



Department for
Business & Trade

Export Client Reported Impact Survey for Businesses Supported April 2022 to March 2023

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



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This work was carried out in accordance with the requirements of the international quality standard for Market Research, ISO 20252.

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1 Executive Summary

1.1 Introduction

The Department for Business and Trade (DBT), formed in February 2023 as part of the Machinery of Government changes which incorporated the former Department for International Trade (DIT), is responsible for promoting exports, both in terms of driving demand from overseas, and encouraging UK businesses to export. DBT offers export promotion services to businesses that wish to seek support with exporting. It tracks the quality and reports the impact of its export promotion services through monthly surveys, known as the Export Client Survey (ECS). The main aims of the ECS are to:

- Track client perceptions of the quality of support and advice provided by DBT
- Provide a measure of reported impact on businesses from using a DBT service
- Understand what drives performance and how services can be improved over time

The ECS comprises two linked surveys: a Quality Survey (QS) and a Reported Impact Survey (RIS). This report presents findings from the RIS. The findings are based on 1,541 interviews conducted by Ipsos UK with businesses who used a DBT service between April 2022 and March 2023 (2022/23). See Section 2.3, Table 2.3.1, below for descriptions of DBT's export promotion services covered by the ECS.

Businesses were classified as 'Sustain', 'Reassure' or 'Promote' depending on their export status. Changes in status between the QS and the RIS, and differences in the proportion of businesses changing status in RIS 2022/23 compared to RIS 2021/22, 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 Advisors (ITAs)

While the proportion of businesses currently exporting (classified as 'Sustain') was not significantly different between the Quality Survey stage (3 months after receiving support, 81%) and the Reported Impact Survey stage (12 months after receiving support, 84%), it was nonetheless lower than in previous years (90% in both the 2021/22 and 2020/21 Reported Impact Surveys). A third of businesses (33%) who had never exported before (classified as 'Promote') at the Quality Survey stage had shifted to being a current exporter at the Reported Impact stage 9 months later.

Businesses reported having won new overseas contracts, with 69% of businesses reporting having won a new overseas contract in the last 12 months, including 32% saying this was with ITA or DBT assistance. Among businesses that won an overseas contract in the past year, 6% said they would not have been able to do this without DBT, and 9% said it would have been unlikely to be able to do this without DBT.

However, businesses were still facing barriers to export. The top barrier was 'cost' (38%) followed by 'time taken to comply' (35%) and 'access to contacts' (34%). These results were in line with the Quality Survey stage.

Businesses who received support from ITAs also reported improvements to their operations 12 months later. The top four changes expected or seen as a result of using the service were: increasing or improving the skills of existing UK employees (47%), safeguarding jobs of existing UK employees (42%), improving job satisfaction of existing UK employees (41%) and increasing export sales per employee (40%).

Lastly, compared to the previous year, Asia replaced Europe as the most common new export market for increased exposure or business. Otherwise, findings remained in line with the previous year.

1.3 Posts

More than 8 in 10 businesses were currently exporting (classified as 'Sustain'), 83% at the Quality Survey stage (3 months after receiving support) and 85% at the Reported Impact Survey stage (12 months after receiving support). Around 1 in 10 businesses that used Posts had never exported before (classified as 'Promote'), 10% at the Quality Survey stage and 8% at the Reported Impact stage, 9 months later.

Businesses reported having won new overseas contracts, with 67% of businesses reporting having won a new overseas contract in the last 12 months, including 29% saying this was with Posts or DBT assistance.

However, businesses were still facing barriers to export. The top barrier was 'access to contacts' (35%) followed by 'lack of knowledge' (29%) and 'cost' (28%). These results were in line with the Quality Survey stage.

Nevertheless, businesses who received support from Posts did report improvements to their operations 12 months later. The top 4 changes expected or seen as a result of using the service were: increasing or improving the skills of existing UK employees (31%), increasing export sales per employee (31%), safeguarding jobs of existing UK employees (29%) and improving job satisfaction of existing UK employees (29%).

Lastly, the survey indicated changes in exporting markets compared to the previous Reported Impact Survey report. Compared to the previous year, Asia replaced Europe as the most common new market for increased exposure or business. In the 2022/23 survey, businesses who had been exposed to new markets were less likely to report increased exposure in Europe (31% compared to 60% in the previous year) and specifically the European Union (24% compared to 48% in the previous year).

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

The proportion of businesses currently exporting (classified as 'Sustain') remained similar between the Quality Survey stage (3 months after receiving support, 92%) and the Reported Impact Survey stage (12 months after receiving support, 90%).

Businesses also reported having won new overseas contracts, with 80% of businesses reporting having won a new overseas contract in the past 12 months, including 31% saying this was with ESS-IM or DBT assistance.

However, businesses were still facing barriers to exporting. The top barriers were 'cost' (39%) and 'access to contacts' (38%) followed by 'lack of knowledge' (34%). These findings were in line with the Quality Survey stage.

Nevertheless, businesses who received support from ESS-IM did report improvements to their operations 12 months later. The top 3 changes expected or seen as a result of using the service were: increasing or improving the skills of existing UK employees (41%), increased export sales per employee (41%) and improving job satisfaction of existing UK employees (38%).

Lastly, the survey indicated that Europe and Asia (including Australia and New Zealand) remained the most common new markets for increased exposure or business. Of businesses who reported increased exposure in at least one new market, 38% said this was in Europe and 37% in Asia.

1.5 Export Academy

The proportion of businesses currently exporting (classified as 'Sustain') remained similar between the Quality Survey stage (3 months after receiving support, 76%) and the Reported Impact Survey stage (12 months after receiving support, 78%). A fifth of businesses (19%) who had never exported before (classified as 'Promote') at the Quality Survey stage had shifted to being a current exporter at the Reported Impact stage 9 months later.

Businesses also reported having won new overseas contracts, with 53% of businesses reporting having won a new overseas contract in the past 12 months, including 18% saying this was with Export Academy or DBT assistance.

However, businesses were still facing barriers to exporting. The top barrier was 'cost' (41%), followed by 'access to contacts' (40%) and 'time taken to comply' (40%). These findings were in line with the Quality Survey stage.

Nevertheless, businesses who received support from Export Academy did report improvements to their operations 12 months later. The top 3 changes expected or seen as a result of using the service were: increasing or improving the skills of existing UK employees (44%), improving job satisfaction of existing UK employees (34%) and safeguarding jobs of existing UK employees (32%).

Lastly, compared to the previous year, Asia replaced Europe as the most common new export market for increased exposure or business. Otherwise, findings remained in line with the previous year.

1.6 Webinars

The proportion of businesses currently exporting (classified as 'Sustain') remained similar between the Quality Survey stage (3 months after receiving support, 74%) and the Reported Impact Survey stage (12 months after receiving support, 78%). 1 in 6 businesses that used Webinars had never exported before (classified as 'Promote'), 17% at the Quality Survey stage and 16% at the Reported Impact stage 9 months later.

Businesses reported having won new overseas contracts, with 59% of businesses reporting having won a new overseas contract in the last 12 months. This included 21% saying this was with Webinars or DBT assistance.

However, businesses were still facing barriers to exporting. The top barrier was 'time taken to comply' (42%), followed by 'access to contacts' (41%) and 'cost' (38%). These findings were in line with the Quality Survey stage.

Nevertheless, businesses who used Webinars did report improvements to their operations 12 months later. The top 2 changes expected or seen as a result of using the service were: increasing or improving the skills of existing UK employees (43%) and safeguarding jobs of existing UK employees (32%).

Lastly, the survey indicated that Asia (including Australia and New Zealand) remained the most common new market for increased exposure or business. Of businesses who reported increased exposure in at least one new market, 55% said this was in Asia, followed by the Middle East (48%), North America (44%) and Europe (37%).

1.7 Issue with OMIS data

A small number (n=3) interviews about the Overseas Market Introduction Service (OMIS) were included in metrics for all services, despite the service not being delivered in 22/23. This data has a negligible impact on overall results. Instances of OMIS being reported separately are noted with footnotes. Service-level metrics for OMIS are not reported due to the low sample size, ensuring comparisons between services remain unaffected.

2 Introduction

2.1 Background and objectives

The Department for Business and Trade (DBT), formed in February 2023 as part of the Machinery of Government changes which incorporated the former Department for International Trade (DIT) and parts of the Department for Business, Energy and Industrial Strategy (BEIS), is responsible for promoting exports, both in terms of driving demand from overseas and encouraging UK businesses to export.

In 2021, the then DIT refreshed its [Export Strategy](#), based on:

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

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

2.2 The Export Client Survey

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

- Track client perceptions of the quality of support and advice provided by DBT
- Provide a measure of reported impact on businesses from using a DBT service
- Understand what drives performance and how services can be improved over time

The ECS forms a key component of the export promotion Monitoring and Evaluation Framework. The ECS comprises two linked surveys: a Quality Survey and a Reported Impact Survey. This report presents findings from the Reported Impact Survey, which is a telephone survey on the reported impact of using DBT 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 DBT services.

The findings in this report are based on 1,541 interviews conducted by Ipsos UK with businesses who used a DBT service between April 2022 and March 2023 (2022/23). In this report, when findings from 2022/23 are compared to findings from the 2021/22 survey, or when findings from the RIS 2022/23 are compared to findings from the QS 2022/23, these are statistically significantly different at the 95% probability level.

2.3 Sample frame and fieldwork

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

Table 2.3.1: DBT export promotion services

Service	Service description	Digital or non-digital
International Trade Advisors (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
Missions	Services related to events (trade fairs and market research) but with a specific focus on face-to-face deal-making.	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
Export Support Service – International Markets ¹ (ESS-IM)	Provides information and advice to small and medium-sized businesses looking to export to particular overseas markets.	Non-digital
Export and Investment Teams	Work directly with industry and the international network to facilitate collaboration between UK businesses, co-ordinate government to government engagement, and support trade missions.	Non-digital
Export Support Service – Service Delivery Centre (ESS-SDC)	A helpline and online service about exporting products or services to Europe. ESS-SDC service deliveries were only recorded for the ECS if escalated through Policy Hub and EU MAC queries.	Non-digital
Export Academy	Gives businesses the know-how to sell to customers around the world by learning from experts in international trade.	Digital
Webinars	Aim to provide information to a target audience, ranging from experienced exporters to businesses that are new to exporting.	Digital
Overseas Market Introduction Service (OMIS) ²	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
Selling Online Overseas (SOO)	An online service containing details of some of the leading e-marketplaces and details of special deals negotiated by DBT.	Digital
Export Opportunities	An online service on great.gov.uk which promotes global exporting opportunities to UK businesses	Digital

¹ Previously known as the Enhanced International Support Service (EISS)

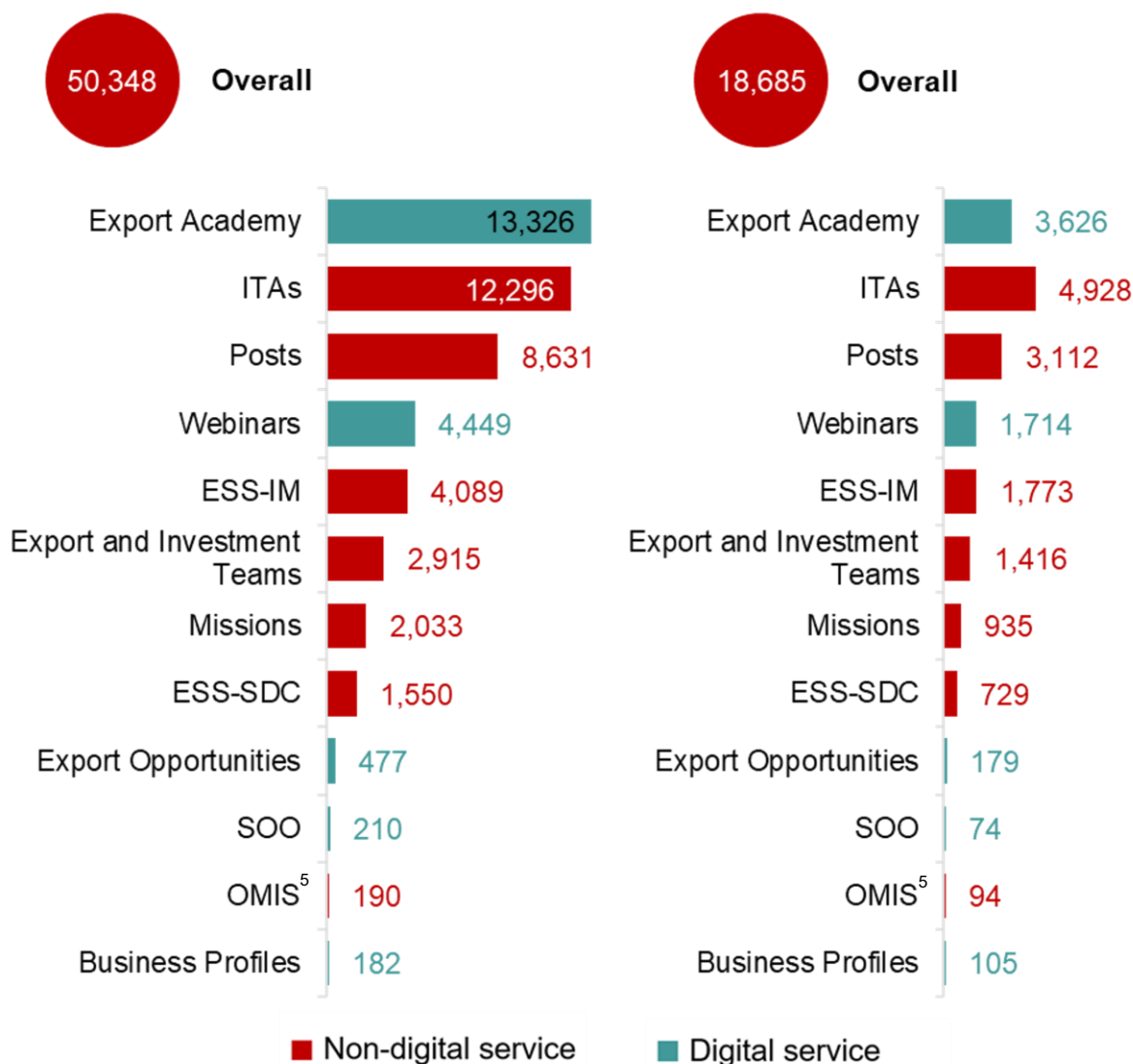
² OMIS service not delivered in 22/23. Please see section 1.7.

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

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

Total number of service deliveries recorded Total number of businesses supported



Description: A bar chart showing the total number of service deliveries recorded and the total number of businesses supported, by service type. On the left hand side a bar chart shows a breakdown of the total number of services deliveries recorded as follows: Export academy 13,326; ITAs 12,296; Posts 8,631; Webinars 4,449; ESS-IM 4,089; Export and Investment Teams 2,915; Missions 2,033; ESS-SDC 1,550; Export Opportunities 477; SOO 210; OMIS 190; Business profiles 182.

³ All 182 eligible Business Profiles service deliveries corresponded to an individual unique business supported, i.e. all businesses were sampled, and there was no overlap with other services.

⁴ Roughly 23% of ESS-IM service deliveries were removed from the sample for service deliveries between April 2022 and November 2022 following an eligibility remapping during survey fieldwork. These ineligible service deliveries have not been reported on in any other part of this report. For more information about sampling and eligibility, please consult the accompanying Technical Report.

⁵ OMIS service not delivered in 22/23. Please see section 1.7.

On the right hand side a bar chart shows a breakdown of the total number of businesses supported as follows: Export Academy 3,626; ITAs 4,928; Posts 3,112; Webinars 1,714, ESS-IM 1,773; Export and Investment Teams 1,416; Missions 935; ESS-SDC 729; Export Opportunities 179; SOO 74; OMIS 94: Business Profiles 105.

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 (CI) and confidentiality of results.

Table 2.3.2: Services covered in this report

Bespoke offers and face to face support
International Trade Advisors (ITAs)
Posts
Export Support Service – International Markets (ESS-IM)
Universal offers (digital and events)
Export Academy
Webinars

3 Methodology

3.1 Sample Design

The Export Client Survey (ECS) involves 2 different surveys. The Quality Survey (QS) takes place first, approximately 3 months after a business has an interaction with DBT. All businesses that completed the QS and agreed to be recontacted for research purposes are included in the sample for the Reported Impact Survey (RIS). The RIS takes place approximately 9 months after the business completed the QS (and 12 months after the business has an interaction with DBT). This ensures sufficient time has lapsed to collect information about reported impact while allowing businesses to be able to recall an event and their business dealings over this period.

3.1.1 Reported Impact Survey (RIS)

Fieldwork for this report began in April 2023 (interviewing businesses who received support from DBT in April 2022 and who participated in the Quality Survey in July 2022). This report covers DBT services delivered between April 2022 and March 2023. The average (mean) interview length was around 18 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 DBT service delivery (provided a rating of 7 or more out of 10 when asked in the QS how satisfied they were with the service).⁶ Table 3.1.1 compares the proportions of businesses that were satisfied in their dealings with the DBT product or service in the QS. The column for ‘All Quality Survey respondents’ presents satisfaction ratings for all who completed the QS. The column for ‘All RIS respondents’ presents the QS satisfaction score for all that completed the RIS. None of the differences in the table are statistically significant (at a 95% confidence level). There is no evidence indicating that there is a positivity bias from this analysis.

⁶ 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 DBT product or service in the QS and RIS (confidence intervals given in square brackets)

DBT Product or Service	All QS respondents (% satisfied)	All RIS respondents (% satisfied)
International Trade Advisors (ITAs)	82% [+/- 2%]	83% [+/- 4%]
Missions	82% [+/- 6%]	79% [+/- 11%]
Export Academy	68% [+/- 3%]	68% [+/- 6%]
Overseas Market Introduction Service (OMIS) (great.gov.uk) ⁷	84% [under 30 base] ⁷	100% [under 30 base] ⁷
Posts	72% [+/- 4%]	69% [+/- 8%]
Export Support Service – International Markets ⁸ (ESS-IM)	66% [+/- 6%]	66% [+/- 9%]
Export Support Service – Service Delivery Centre (ESS-SDC)	55% [+/- 10%]	61% [under 30 base]
Export and Investment Teams	61% [+/- 7%]	68% [+/- 11%]
Webinars	71% [+/- 5%]	65% [+/- 9%]
Business Profiles	35% [under 30 base]	44% [under 30 base]
Selling Online Overseas	62% [under 30 base]	80% [under 30 base]
Export Opportunities	52% [under 30 base]	58% [under 30 base]
Overall	72% [+/- 2%]	72% [+/- 3%]

3.2 Response rates

Table 3.2.1 below shows response rates achieved during fieldwork between April 2023 and March 2024. Table 3.2.2 breaks this down by DBT product or service. As noted in section 1.3, detailed analysis of several products or services has not been included in this report as the base sizes were too low to report on with confidence.

We calculated the overall response rate using the [American Association for Public Opinion Research \(AAPOR\) standard definitions](#), an industry standard metric for calculating response rates. As all businesses in the RIS sample had completed the QS and agreed to be recontacted, there was no ineligible sample. The response rate is calculated by:

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

We achieved a 48% response rate for interviews conducted between April 2023 and March 2024.

⁷ OMIS service not delivered in 22/23. Please see section 1.7.

⁸ Previously known as the Enhanced International Support Service (EISS).
Methodology

Deadwood sample refers to sample that could not be reached either by the Ipsos telephone team or by email.⁹

Table 3.2.1: Fieldwork outcomes April 2023 to March 2024

Fieldwork outcomes	Number of cases (N)
Number of cases issued	3,197
Live sample not interviewed	1012
Deadwood (uncontactable)	120
Refusal	524
Ineligible	294
Completed interviews	1,541
Response rate	48%

⁹ In previous years, Deadwood sample referred only to sample that was uncontactable by telephone. In 2022/23, due to the introduction of an online survey completion option, sample that could not be reached by phone was subsequently emailed with a link to the online survey. This figure therefore refers to sample that could not be contacted by telephone **and** without a valid email address.

3.2.1 Response rate for each DBT service

Table 3.2.2: Fieldwork outcomes April 2023 to March 2024 (by service)

Outcome	ITAs	Missions	ESS-SDC	OMIS ¹⁰	Posts	Export & Investment Teams	Webinars	Export Opportunities	Business Profiles	Selling Online Overseas	Export Academy	ESS-IM
Number of cases issued	1,042	159	81	12	398	186	281	24	17	15	726	256
Live sample not interviewed	276	59	24	7	149	61	87	6	7	3	248	85
Deadwood	31	7	1	0	22	8	11	2	0	2	26	10
Refusal	184	20	18	2	59	28	49	5	2	2	114	41
Complete	551	73	38	3	168	89	134	11	8	8	338	120
Response rate	53%	46%	47%	25%	42%	48%	48%	46%	47%	53%	47%	47%

¹⁰ OMIS service not delivered in 22/23. Please see section 1.7.

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 7 or higher), neutral (a score of 4 to 6), and negative (a score of 3 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 analysis and the charts unless otherwise stated or 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 for 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 RIS 2021/22 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 QS 2022/23 and the RIS 2022/23. 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.

The definition of SMEs and Large businesses is based on the number of employees within the business. SMEs are defined as businesses with 0-249 employees. Large businesses are defined as businesses with 250+ employees.

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 DBT services or products covered by the Reported Impact Survey (RIS). It examines 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 2022 and March 2023. Therefore, the 'current year' refers to 2022/23, while the 'previous year' refers to 2021/22.

As noted in the Introduction and Methodology sections, the report only covers services or products where base sizes were sufficiently comprehensive (section 2.3). Further detail about how to interpret the data can also 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 identify the services and support they need to grow internationally. ITAs offer a broad range of services, including tailored advice, training opportunities and structured programmes. They can also introduce other services from across DBT, other government offices, and independent third-party service providers for more in-depth support across specialist areas.

This chapter explores the impact of using the ITA service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 551 businesses that used ITAs between April 2022 and March 2023 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, two in three businesses had identified new export opportunities or made new contacts (67%). Among non-exporters, six in ten (60%) businesses had assessed their readiness to export after using ITAs.

Compared to the previous year, businesses were more likely to have made investments to support exporting (45%, up from 36% in 2021/22).

Impact on exporting

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) was lower than in previous years (84%, down from 90% in both 2021/2022 and 2020/2021), but in line with the QS 2022/23 (81%).

In total, a third (33%) of businesses classified as 'Promote' in the QS 2022/23 survey had shifted to 'Sustain' in the RIS 2022/23. This was in line with the previous year.

Impact on winning contracts

Of the businesses that exported, 8 in 10 (82%) reported winning new overseas business contracts or gaining extensions to existing overseas contracts in the past year since using the ITA service.

Overall, 70% of businesses won a new overseas contract, including 32% saying this was with ITA or DBT assistance. Among businesses that won an overseas contract in the past year, 6% said they would not have been able to do this without DBT, and 9% said they would have been unlikely to be able to do this without DBT. These findings were in line with the previous year.

Impact on exposure and growth

Around 7 in 10 (69%) businesses who won any new overseas business contracts with the help of DBT said ITAs assisted with expansion into a new market, and around 8 in 10 (78%) said ITAs assisted with expansion within an existing market.

Among all businesses, 1 in 3 (33%) reported being exposed to or starting to do business in at least one new market. This was higher than the previous year (26% in 2021/22).

Compared to the previous year, Asia replaced Europe as the most common new market for increased exposure or business. Otherwise, results remained in line with the previous year.

Impact on contacts and networks

Around 6 in 10 businesses (58%) made at least one new overseas contact after using ITAs. The average number of contacts made was 4, which was an increase from the RIS 2021/22 average of three.

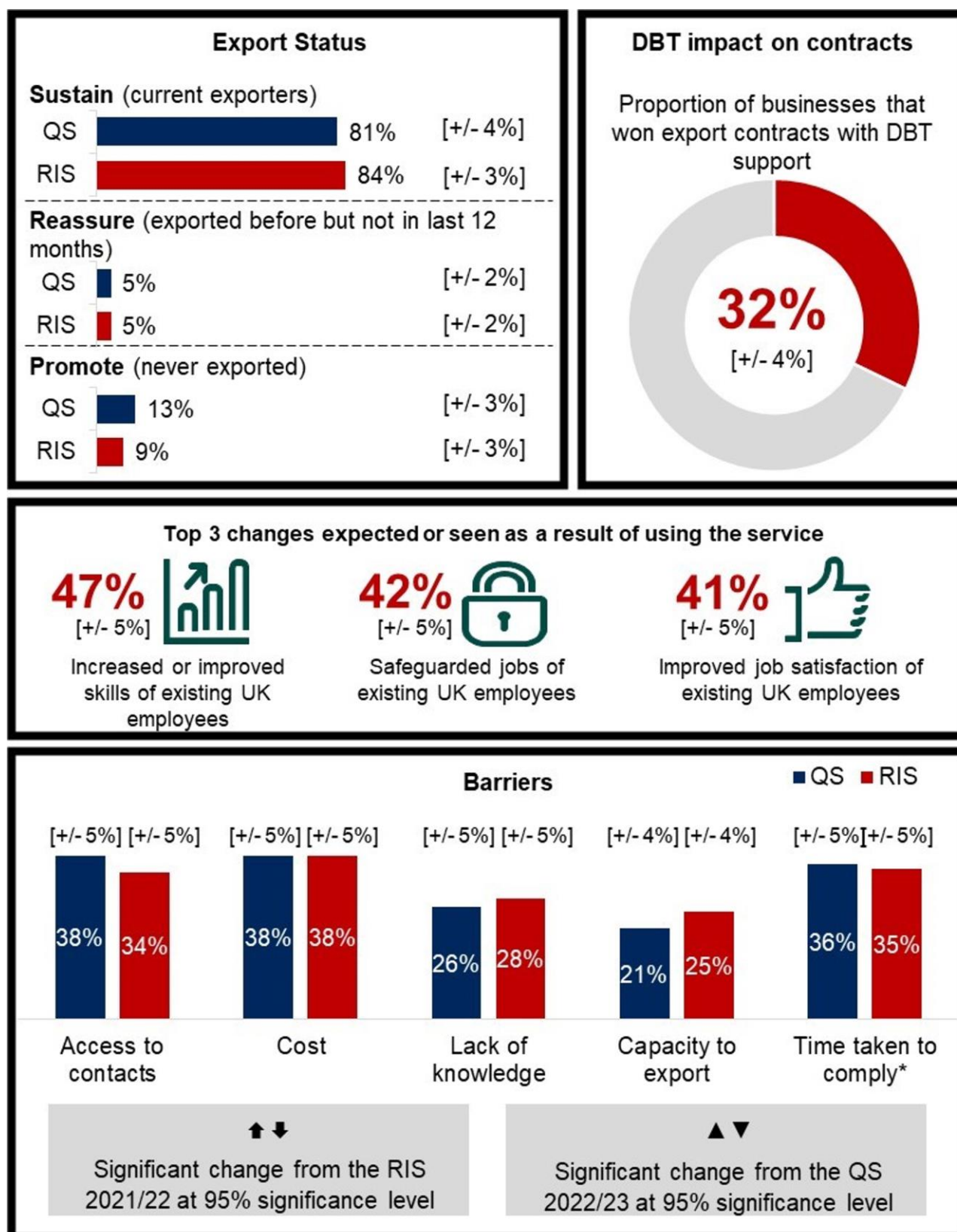
Impact on confidence

4 in 10 (42%) reported that using the ITA service boosted their confidence to export in a new market, and 1 in 3 (35%) said this for increasing exports in an existing market. Results were in line with the previous year.

Other impact

Around 6 in 10 (63%) businesses reported that the ITA service helped them to gain access to information that they would otherwise have been unable to come by. Around half (52%) said that using the ITA service had helped them to gain access to prospective customers, business partners or other people. Results were in line with the previous year.

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



Caption: Base: All businesses that used International Trade Advisors (ITAs) and completed both surveys (n=551); Barriers - Access to contacts (QS n=548, RIS n=544), Cost (QS n=544, RIS n=541), Lack of knowledge (QS n=547, RIS n=546), Capacity to

export (QS n=541, RIS n=541), Time to comply (QS n=539, RIS n=534 * Code amended or added in 2022/23).

Description: A collection of charts showing headline findings for businesses using the service. This includes findings for export status, DBT impact on contracts, changes expected or seen as a result of using the service and barriers. These findings are described in more detail throughout this chapter.

4.1.2 Satisfaction with ITAs (from Quality Survey)

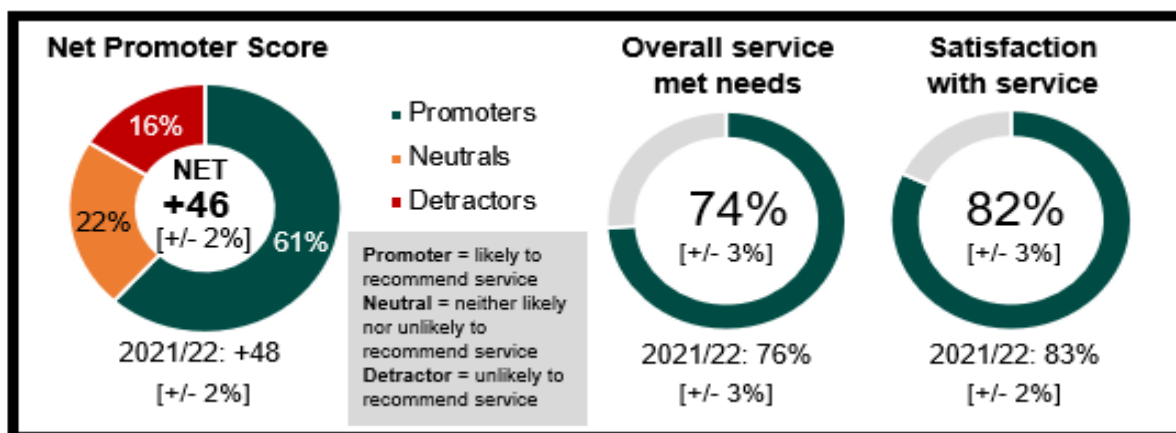
In the QS 2022/23, 6 in 10 businesses (61%) that used ITAs said they would recommend the service, while 1 in 6 (16%) said they would not. This gave ITAs a Net Promoter Score (NPS) of +46. 8 in 10 (82%) reported they were satisfied with the ITA service, and three-quarters (74%) said the overall service met their needs. These results were in line with the previous year.

ITA respondents were particularly positive about the staff knowledge (87%), the straightforwardness of the registration process (86%) and the organisation of the service (84%). Compared to the previous year, businesses were less positive about the organisation of the service (84% compared to 88% in 2021/22).

As a result of using ITAs, over half of businesses (54%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all ITA respondents, 3 in 5 (61%) said they had identified new export opportunities or made new contacts, higher than the previous year (53% in 2021/22). Businesses were more likely to have taken other actions as a result of using ITAs: making investments to support exporting (37%, up from 32%), looking for other export support services (33%, up from 27%), securing finance or funding (31%, up from 24%), making a deal that would yield exports (30%, up from 24%), and using other export support services (22%, up from 17%). Businesses were less likely to have researched the paperwork and regulations needed to export (44%, down from 49% in 2021/22), and this represents a 2-year downward trend (55% in 2020/21).

ITA respondents were most likely to report that 'cost' and 'access to contacts, customers and the right networks' were barriers to exporting (both 39%). This was in line with the previous year.

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



Caption: Base: All businesses who used the service (n=1,479 (2021/22), n=1,277 (2022/23)); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=1,446 (2021/22), n=1,245 (2022/23)); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=1,465 (2021/22), n=1,257 (2022/23))

Description: A collection of three circle charts, showing the NPS score – broken down into Promoters, Neutrals and Detractors – followed by the percentage that thought the overall service met needs, and the percentage satisfaction with service.

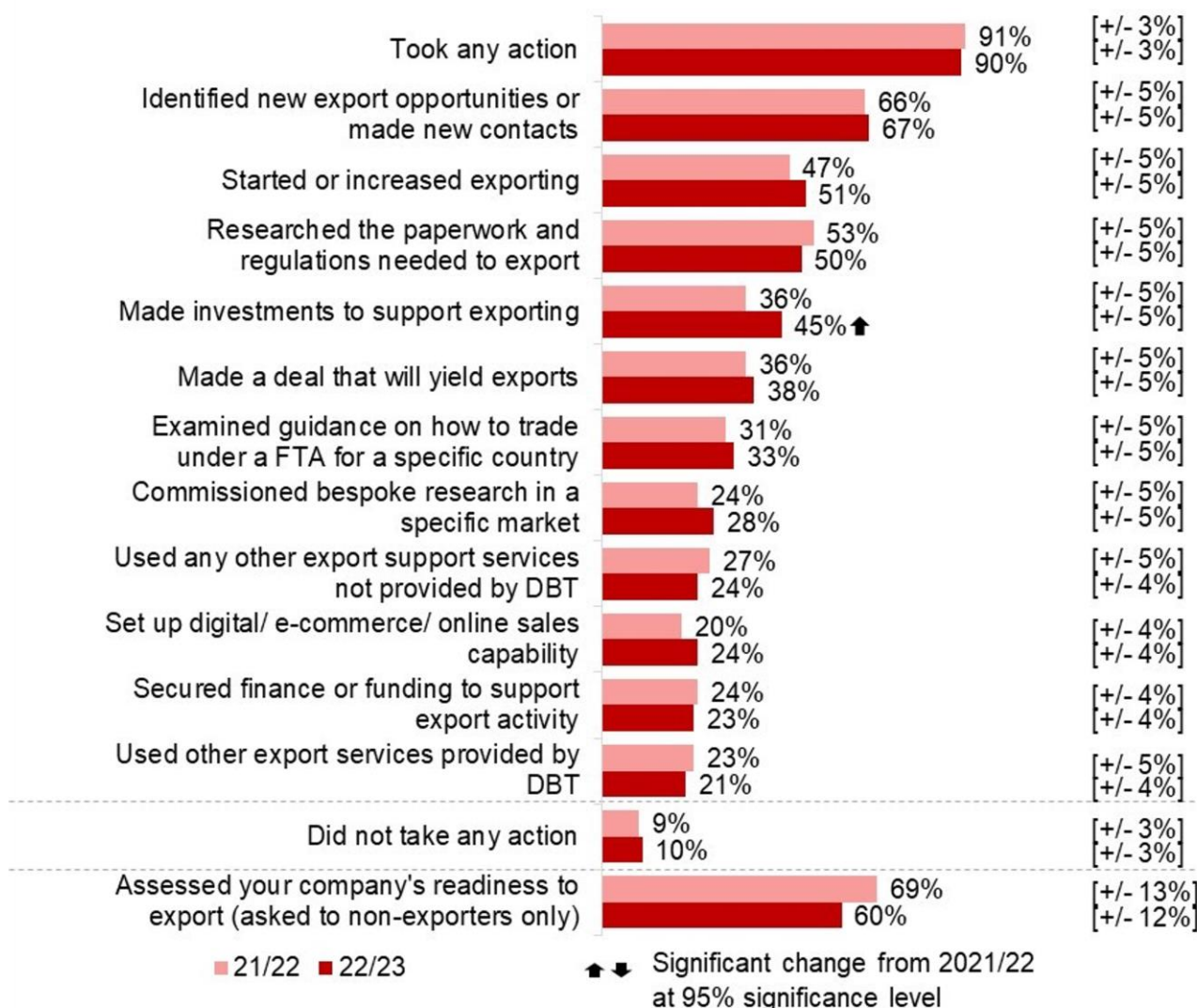
4.1.3 Actions taken as a result of the service

Businesses were asked about the actions they had taken following their use of the ITA service (Chart 4.1.3). Overall, 9 in 10 (90%) businesses had taken an action following their use of the ITA service. 2 in 3 businesses reported they had identified new export opportunities or made new contacts (67%), while around half reported they had started to export or increased exporting (51%) and half had researched the paperwork and regulations needed to export (50%). 3 in 5 businesses (60%) that were not exporting had assessed their business' readiness to export.

Businesses with a turnover of £500,000 or more per year were more likely to use other export services provided by DBT (27%) than those with a lower turnover (16%).

Compared to the previous year, businesses were more likely to have made investments to support exporting (45%, up from 36% in 2021/22).

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



Caption: QResultService: What has your business done as a result of the service?
 Base: All businesses that used International Trade Advisors (ITAs) (n=551 (2022/23), n=563 (2021/22)); All businesses that used International Trade Advisors (ITAs) and were non-exporters (n=95 (2022/23), n=58 (2021/22))

Description: Clustered bar chart comparing what businesses have done as a result of using the service in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Businesses that had made an investment as a result of using the ITA service were asked what investments they had made (249 respondents, see Chart 4.1.4). The most common answer was an increase in marketing and sales activity (78%), followed by increased number of staff (66%) and R&D investment (62%).

Businesses with a turnover of £500,000 or more were more likely to have increased the number of staff (82%) compared with those with lower turnover (49%).

Compared to the previous year, more businesses had increased the number of staff (66%, up from 51% in 2021/22).

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



Caption: QInvestmentMade: Which of the following investments has your business made to support new or increased export opportunities?

Base: All businesses that used International Trade Advisors (ITAs) and made investments to support exporting as a result of using International Trade Advisors (ITAs) (n=249 (2022/23), n=213 (2021/22)), * Redacted due to small base size.

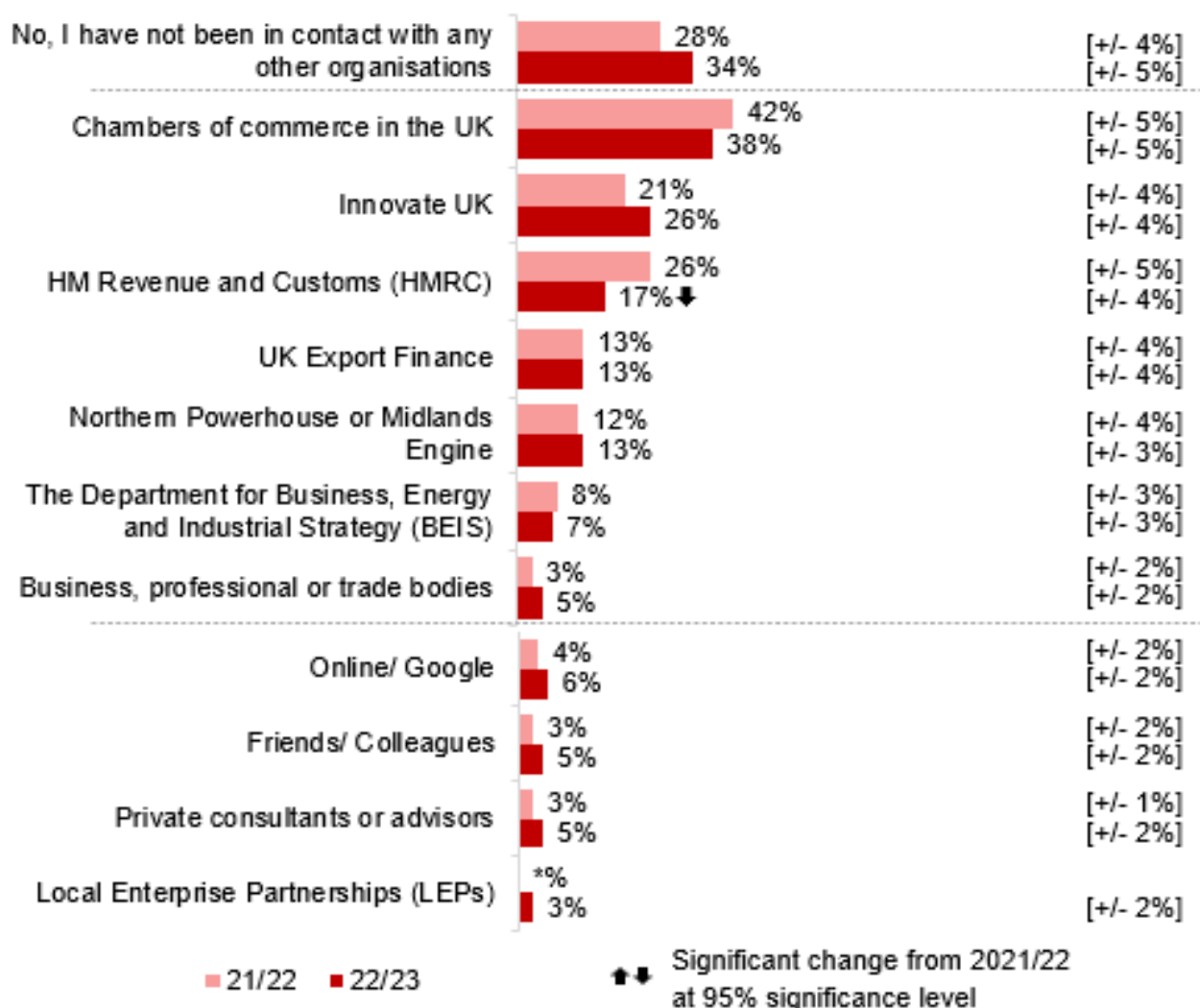
Description: Clustered bar chart comparing what type of investments businesses have made to support new or increased export opportunities following using ITAs in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Businesses were asked what organisations they had been in contact with since using ITAs. Around 4 in 10 (38%) had been in contact with the British Chambers of Commerce, 1 in 4 (26%) had been in contact with Innovate UK and 1 in 6 (17%) had been in contact with HMRC. 1 in 3 (34%) 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 had contact with the British Chambers of Commerce than businesses with a turnover of less than £500,000 (45% and 27% respectively). Businesses with a turnover of less than £500,000 were more likely to have had contact with Local Enterprise Partnerships (LEPs) than businesses with a higher turnover (6% and 1% respectively). They were also more likely to have had contact with friends or colleagues (10% and 4% respectively).

Compared to the previous year, businesses were less likely to have been in contact with HMRC (17%, down from 26% in 2021/22). However, they were more likely to have had contact with Local Enterprise Partnerships (LEPs) (3%, up from 1% in 2021/22).

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



Caption: QAnyContact: Since your business used the service 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 International Trade Advisors (ITAs) (n=551 (2022/23), n=563 (2021/22)), *Redacted due to small base size.

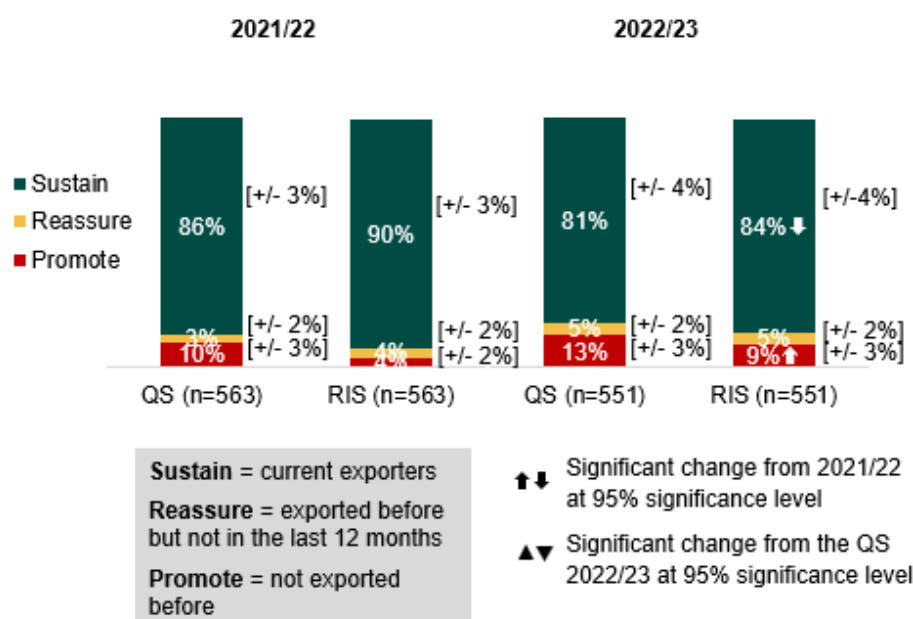
Description: Clustered bar chart comparing what organisations respondents have been in contact since receiving the service in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

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 QS, and their export status 12 months later in the RIS. Responses from those who took part in both surveys were analysed to see whether the export status of these businesses has changed over this period. DBT has grouped UK businesses into segments, which reflect businesses' views on their potential to export (Chart 4.1.6). These segments include:

- **Sustain:** refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around 8 in 10 businesses (81%) that used ITAs fell into this segment at the time of the service delivery (QS 2022/23). This was in line with the RIS 12 months later (84%).
- **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. Among ITA users, 5% fell into this segment at the time of the service delivery (QS 2022/23), and this was unchanged 12 months later (5%).
- **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. More than 1 in 10 (13%) that used ITAs were in this segment at the time of the service delivery (QS 2022/23). This was broadly similar 12 months later (9%).

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



Caption: Source: Composite measure merging data from several variables.

Base: All businesses that used International Trade Advisors (ITAs) and completed both surveys (Quality Survey: n=551 (2022/23), n=563 (2021/22); RIS: n=551 (2022/23), n=563 (2021/22))

Description: Stacked bar charts comparing the export status of respondents at the time of service delivery in 2022/23 to 2021/22, split between sustain, reassure and promote. The main findings were presented in the text preceding the chart.

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).

Around 6 in 10 (58%) businesses from the Reassure segment moved to Sustain, 4% of businesses in the Sustain segment moved to Reassure. These findings were in line with the previous year (2021/22).

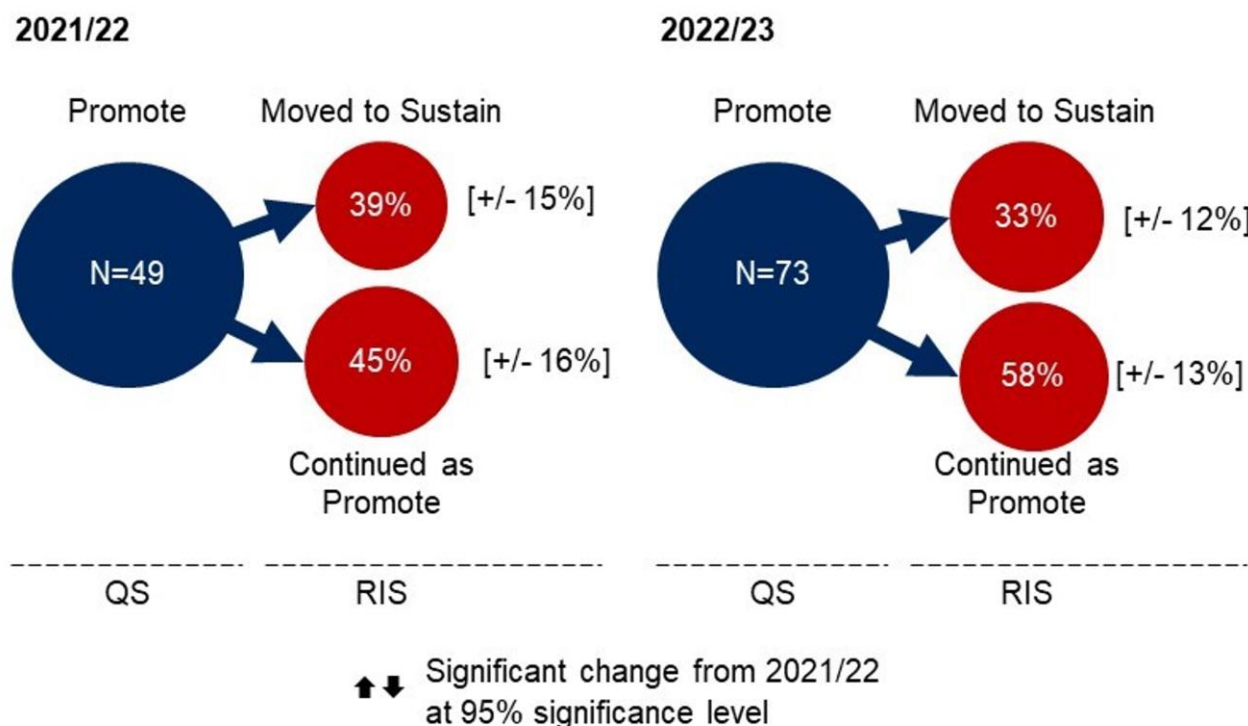
Table 4.1.1 Change in export status at time of the service delivery (QS) and 12 months later (RIS) – ITAs

Quality Survey Export status	RIS Export status	Percentage	Change since 2022/23
Sustain (n=452)	Sustain	95% [+/- 2%]	-
	Reassure	4% [+/- 2%]	-
	Promote	***% [+/- 1%]	-
Promote (n=73*)	Sustain	33% [+/- 15%]	-
	Reassure	***% [+/- 8%]	-
	Promote	58% [+/- 16%]	-

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; **Very small base size. *** Redacted due to small base size

Considering businesses that were in the Promote segment (never exported) at the time of the Quality Survey (73 businesses), 58% remained in Promote, whilst 33% moved to Sustain (exported in the last 12 months) (Chart 4.1.7). On the other hand, considering businesses that were in the Sustain segment at the time of the Quality Survey (452 businesses), 95% continued in Sustain, while 4% moved to Reassure. These findings were in line with the previous year.

Chart 4.1.7 Exporter status reported at time of the service delivery (Quality Survey) and 12 months later (RIS) – ITAs



Caption: Source: Composite measure merging data from several variables.
Base: All businesses that used International Trade Advisors (ITAs) who were in the Promote segment in the Quality Survey: n=73 (2022/23), n=49 (2021/22)

Description: Two charts showing the proportion of respondents who moved from 'Promote' status in the QS to 'Sustain' or 'Promote' in the RIS. One chart is for 2021/22 and the other is for 2022/23. The main findings were presented in the text preceding the chart.

4.1.5 Reported export contracts achieved since receiving the service

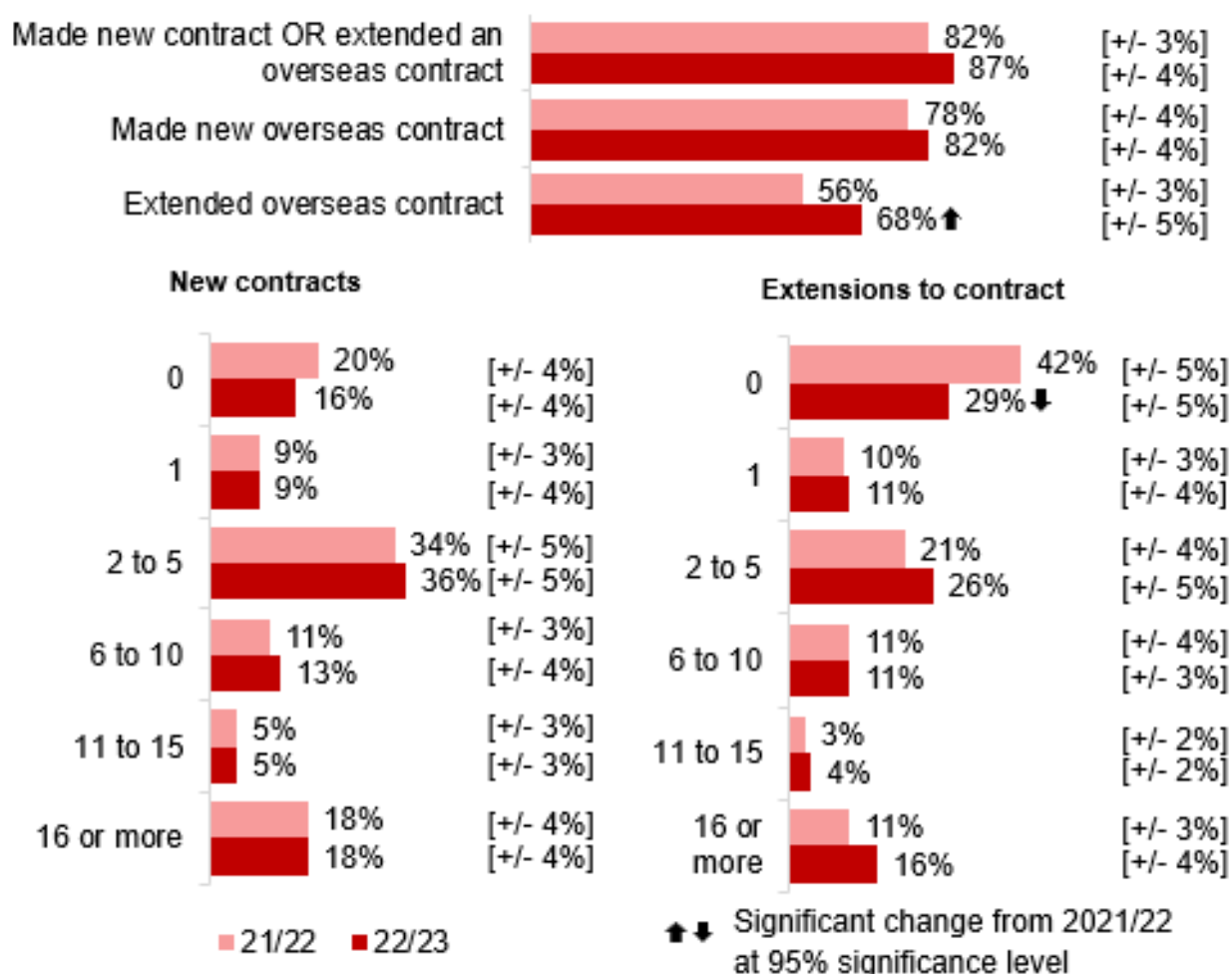
Businesses that had exported in the previous 12 months were asked if they had won any new export contracts, or extended any existing contracts, in the 12 months since using the ITA service. Businesses were asked to think about all contracts, not just those assisted by ITAs or DBT.

Of the 475 businesses that were exporting or had exported in the previous 12 months, 87% 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 (Chart 4.1.8). This was broadly in line with the RIS 2021/22 (82%) but statistically significantly higher than the RIS 2020/21 (81%).

Around 4 in 5 (82%) of the businesses that were exporting or had exported in the previous 12 months had won new overseas business contracts in the year since they used the service (Chart 4.1.8). Specifically, 9% had won one overseas contract, and around a third (36%) had won between two and five overseas contracts. Nearly 1 in 5 (18%) businesses had won 16 or more overseas contracts. The median number of contracts won among exporting businesses that had used ITAs was three. Findings were in line with the previous year.

Two thirds (68%) of the businesses that were exporting or had exported in the previous 12 months reported they had gained extensions to existing overseas business contracts in the year since they used the service.¹¹ This was higher than the previous year (56% in 2021/22). Specifically, 11% extended one contract, and a quarter (26%) extended between 2 and 5 contracts. One in six (16%) extended 16 or more existing overseas sales contracts. Around three in ten (29%) businesses had not extended any existing contracts (down from 42% in 2021/22). The median number of contracts extended (including those that did not extend any) was one.

Chart 4.1.8 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 – ITAs¹²



Caption: QNewcontract: How many new overseas business contracts for export sales did you win in the past year?

QExtendcontract: How many extensions to existing overseas business contracts for export

¹¹ This is taken from the 469 businesses that were exporting or had exported in the previous 12 months 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.

¹² The total percentage of all responses for this question may not sum to 100% due to rounding.

sales did you win in the past year?

Base: All businesses that used International Trade Advisors (ITAs) and were currently selling, or had previously sold goods or services overseas in the previous 12 months (n=475 (2022/23), n=516 (2021/22)); All businesses that used International Trade Advisors (ITAs) and were currently selling, or had previously sold goods or services overseas in the previous 12 months, and that answered how many new business contracts were won in the past year (n=469 (2022/23), n=510 (2021/22))

Description: A set of clustered bar charts comparing data between 2021/22 and 2022/23. One compares the proportion that made or extended overseas contracts, the second compares the proportion of numbers of new contracts, and the last compares the proportion of numbers of extensions to contracts. The main findings were presented in the text preceding the chart.

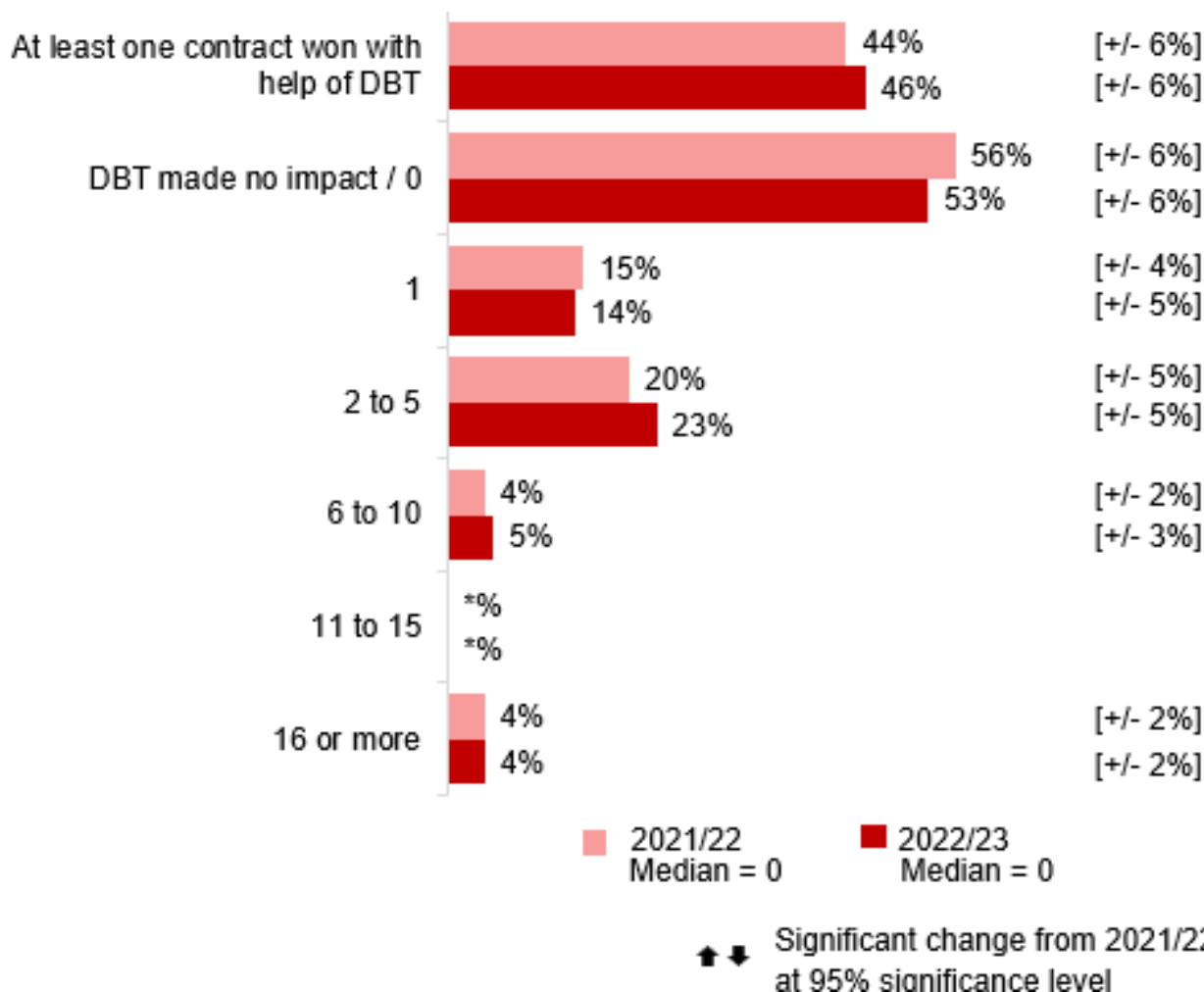
Reported additional contracts which were gained because of DBT support

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 DBT. In total, 378 businesses (that is 69% of the businesses that were interviewed overall) felt able to provide an estimate and were surveyed about their experiences.

As shown in Chart 4.1.9 below, over half of these businesses (53%) said they won no new overseas sales contracts with the help of DBT, or that using DBT services made no impact. Around 1 in 7 (14%) had won one new overseas contract, and around 1 in 4 (23%) had won between 2 and 5 contracts. The median number of contracts that DBT helped win was zero¹³, for current exporters that used ITAs. This was in line with the previous year (RIS 2021/22).

¹³ This includes businesses that reported the ITA service did not help them to win any contracts.

Chart 4.1.9 Number of new overseas contracts said to be won with the help of DBT in the last 12 months (including those who said DBT made no impact) – ITAs



Caption: QContractDBT: 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 DBT?

QContractNumber: How many new overseas contracts were won with help from DBT?

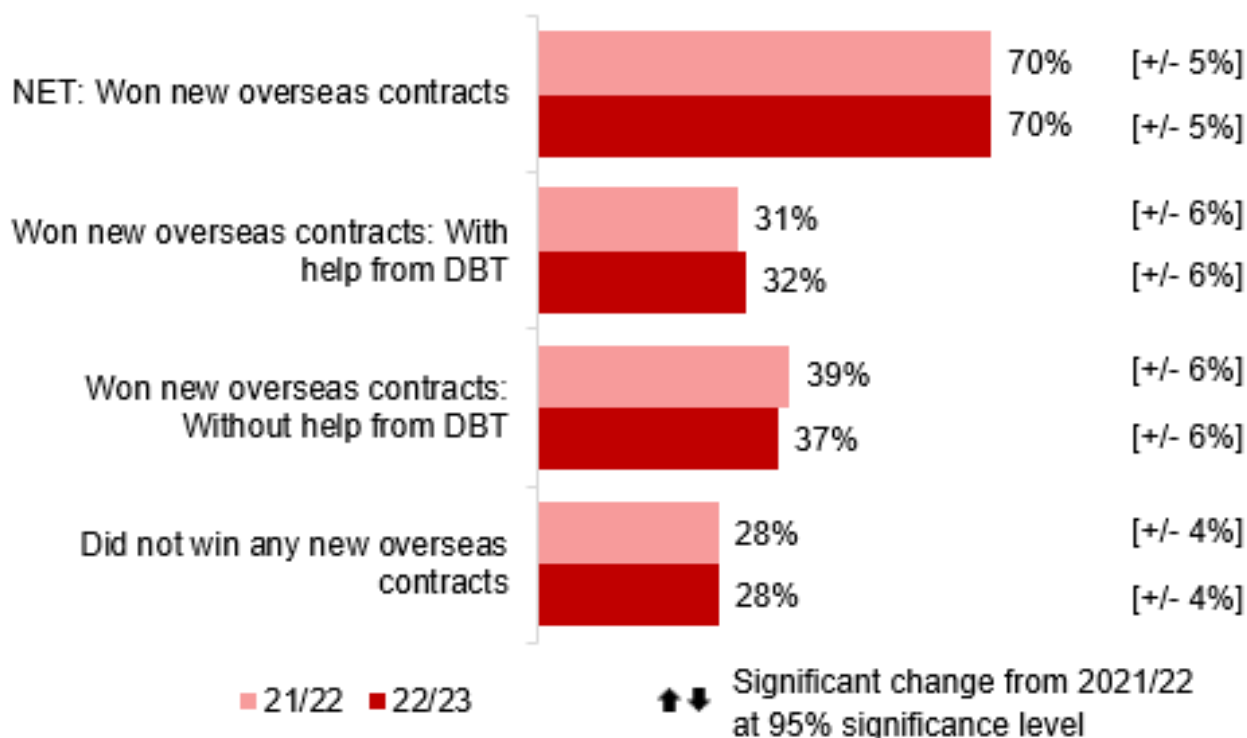
Base: All businesses that used International Trade Advisors (ITAs) and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (n=378 (2022/23), n=386 (2021/22)), *Redacted due to small base size. Median values include zero.

Description: Clustered bar chart comparing the number of new overseas contracts said to be won with the help of DBT in the last 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DBT (Chart 4.1.10). Among all businesses that had used ITAs, 70% said they had won new overseas contracts (either with help from DBT, without help from DBT, or were unsure whether DBT helped). More specifically, we estimate that 32% of ITA respondents had won contracts with help from DBT, while 37% of

ITA respondents said they had won contracts without help from DBT. This was in line with the previous year.¹⁴

Chart 4.1.10 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 DBT support – ITAs



Caption: Source: Composite measure merging data from several variables.
Base: All businesses that used International Trade Advisors (ITAs) (n=551 (2022/23), n=563 (2021/22))

Description: Clustered bar chart comparing the proportion of businesses reported or estimated to have won or not won new overseas contracts with or without DBT support in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Importance of DBT's support in winning overseas contracts

The survey explored views on the importance of DBT'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 DBT in the last 12 months, since the delivery of the ITA service. Exporting businesses who said that DBT 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 DBT' to better understand the level of support that the ITA service provided (Chart 4.1.11).

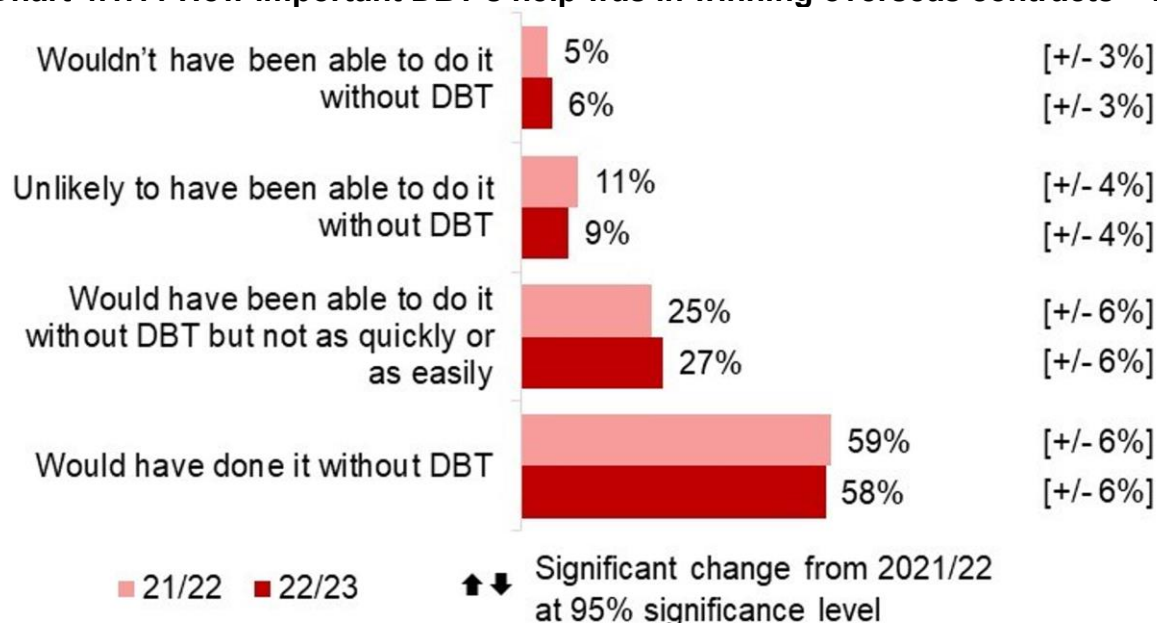
Two fifths of these businesses (42%) reported that DBT support was important in helping them win these contracts to some extent. This includes 6% who said they would not have

¹⁴ Please refer to the annex and survey technical report for a more detailed explanation of this measure.

been able to do it without DBT, and 9% who thought it was unlikely they could have done it without DBT. Around a quarter (27%) thought they would not have been able to do it as quickly or easily without DBT support (Chart 4.1.11). The remaining 58% thought they would have been able to achieve the same outcome without DBT support. These results are in line with the previous year.

Businesses with a turnover of £500,000 or more were more likely to have reported that DBT support was important in helping them win these contracts (48%) than those with a turnover of less than £500,000 (32%). In particular, they were more likely to say they would not have been able to do it as quickly or easily without DBT support (33% compared with 12%).

Chart 4.1.11 How important DBT's help was in winning overseas contracts – ITAs



Caption: QContractHelp: How important was DBT's help in winning these overseas contracts?

Base: All businesses that used International Trade Advisors (ITAs) and won any new overseas contracts in the past year (n=378 (2022/23), n=386 (2021/22))

Description: Clustered bar chart comparing how important DBT's help was in winning overseas contracts in 2021/22 to 2020/21. The main findings were presented in the text preceding the chart.

4.1.6 Reported value of export sales achieved since receiving the service

Reported value of the export sales of new contracts

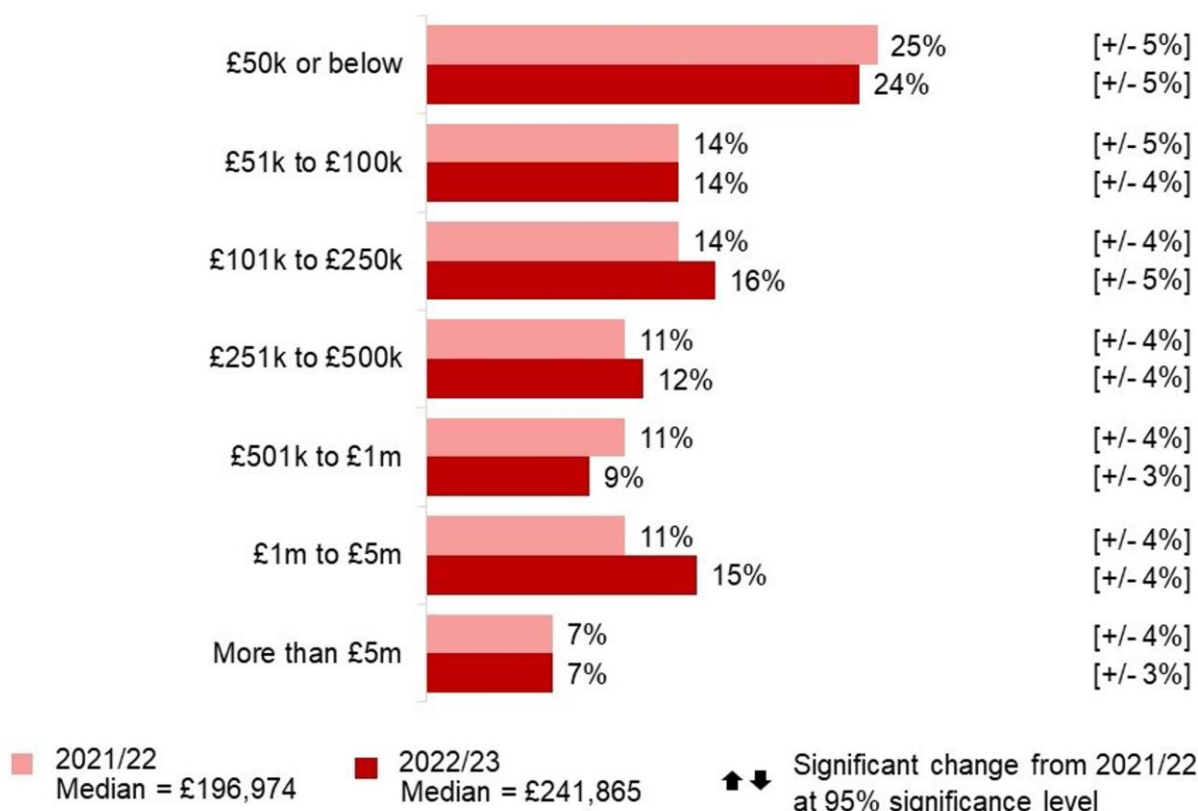
The 69% of businesses that had won new overseas contracts (excluding extensions to existing contracts) were also asked about the value of export sales of those contracts, in total (Chart 4.1.12). The median value of the export sales of all new overseas contracts for these businesses was £241,865 (compared to £196,974 in the RIS 2021/22 and £137,540 in the RIS 2020/21).¹⁵ One quarter (24%) had won contracts with an export sales value of

¹⁵ Values are not adjusted for inflation when comparing to 2021/22.

£50,000 or below. 1 in 5 (22%) said that the export sales value of the new overseas contracts won was more than £1 million.

Results were in line with the previous year.

Chart 4.1.12 Value of all new overseas contracts made in previous 12 months – ITAs



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

Base: All businesses that used International Trade Advisors (ITAs) and won any new overseas business contracts (n=378 (2022/23), n=386 (2021/22))

Description: Clustered bar chart comparing the value of all new overseas contracts made in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Reported additional value of DBT support

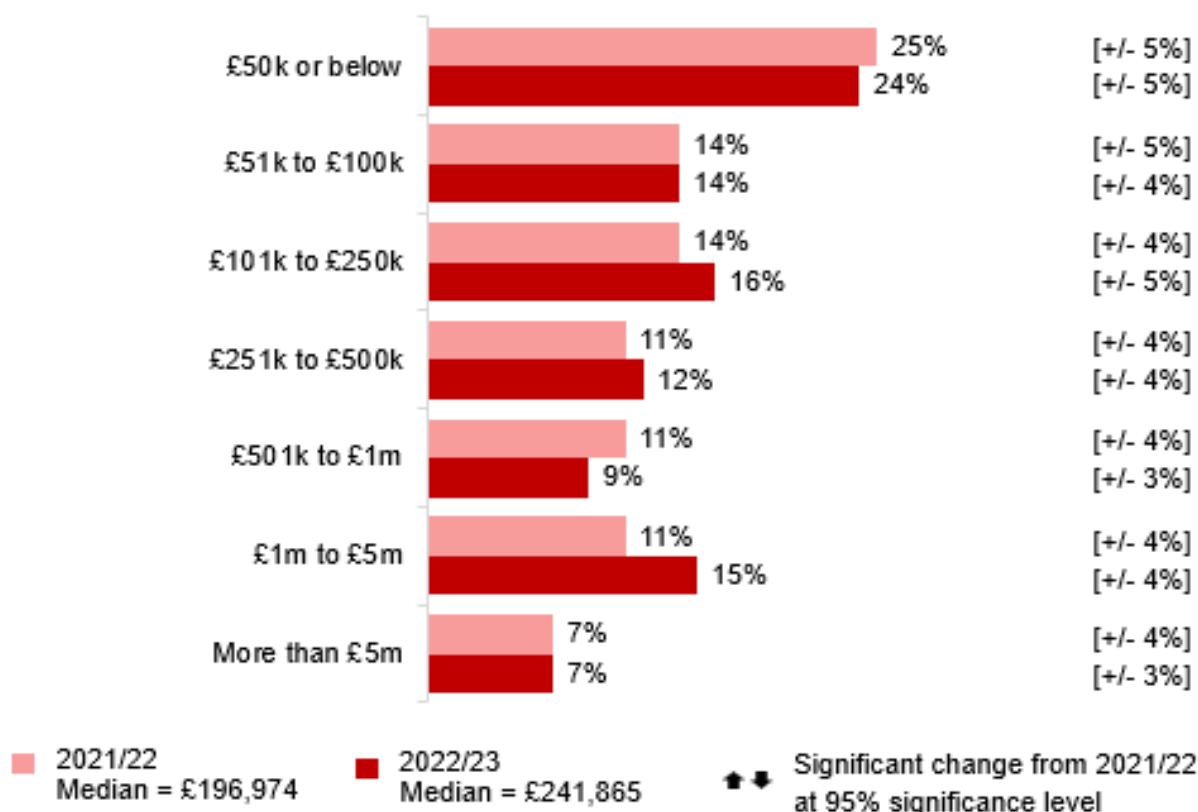
This section considers the value of DBT support to businesses. If businesses were not able to estimate the impact of the ITA service, they were asked to think about the impact from all their interactions with DBT. The analysis in this section measures the additional contribution that DBT made towards 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 DBT support (Chart 4.1.13). This data was used to estimate the 'reported additional export sales' – that is, the reported additional impact of using DBT

services on export sales. The reported additional export sales for ITAs were £90,190, across all the contracts that ITAs helped businesses to win (compared to £74,097 in the RIS 2021/22 and £42,463 in the RIS 2020/21). Note that this does not include businesses that did not win any new export contracts, or businesses that said DBT made no impact on overseas contract wins.

Two fifths (39%) reported additional export sales of £50,000 or below, and 16% reported additional new export sales of between £51,000 and £100,000. A small proportion of businesses had exceptionally large value added by DBT support; 11% won overseas sales contracts with the help of DBT support worth £1 million or more (Chart 4.1.13). These results are in line with the previous year.

Chart 4.1.13 Value of new overseas contracts helped by DBT support in previous 12 months – ITAs



Caption: QContractValueDBT: What was the value of these new overseas business contracts that your business won with the help of support from the service or DBT last year?

Base: All businesses that used International Trade Advisors (ITAs) and won any new overseas business contracts with the help of DBT (n=173 (2022/23), n=166 (2021/22)), * Redacted due to small base size.

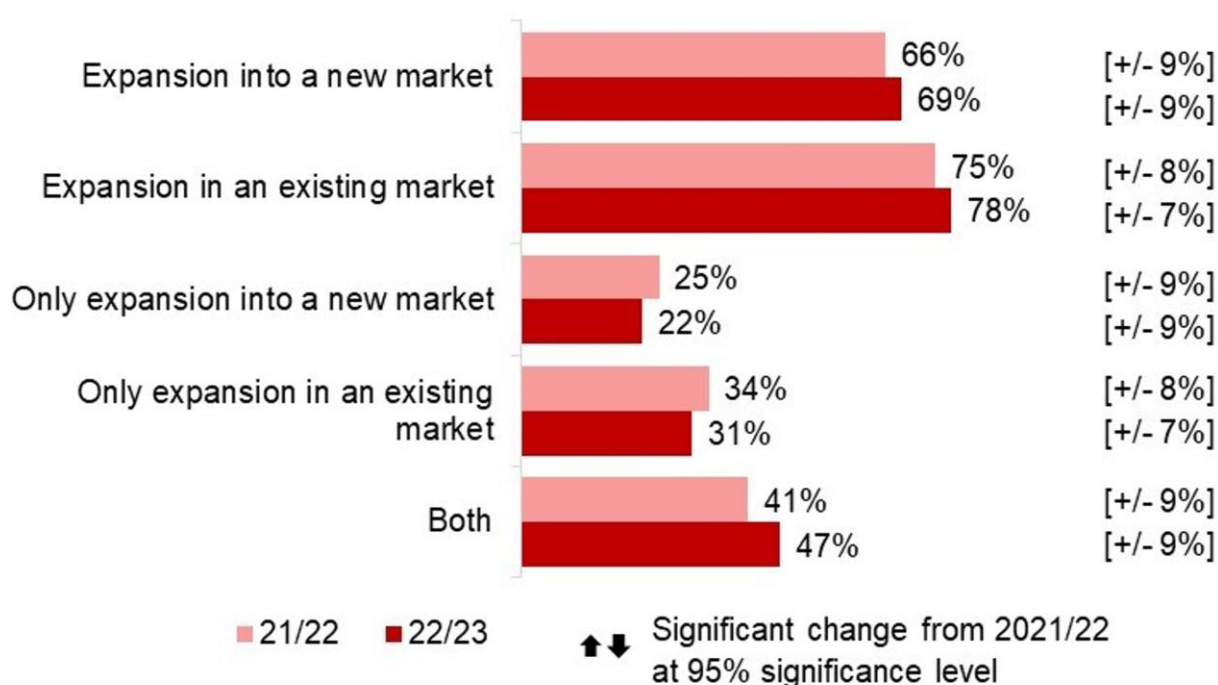
Description: Clustered bar chart comparing the value of all new overseas contracts made with DBT support in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

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 (Chart 4.1.14). This question was asked to businesses that said DBT support helped them to win new overseas contracts and were able to provide details of the number and value of these contracts.

Around two thirds (69%) of these businesses said they were assisted with expansion into a new market and around three-quarters (78%) said they were assisted with expansion within an existing market. This includes 22% who said that DBT helped them expand into new markets (but not existing markets), and 31% who expanded within an existing market (but not into new markets). Almost half (47%) reported that DBT helped them expand into both existing and new markets. These results are in line with the previous year.

Chart 4.1.14 Whether new contracts won with DBT's help represented expansion into new markets or existing markets – ITAs



Caption: QContractRepresent: Did these new overseas contracts represent ...?

Base: All businesses that used International Trade Advisors (ITAs) and won any new overseas business contracts with the help of DBT (n=173 (2022/23), n=166 (2021/22))

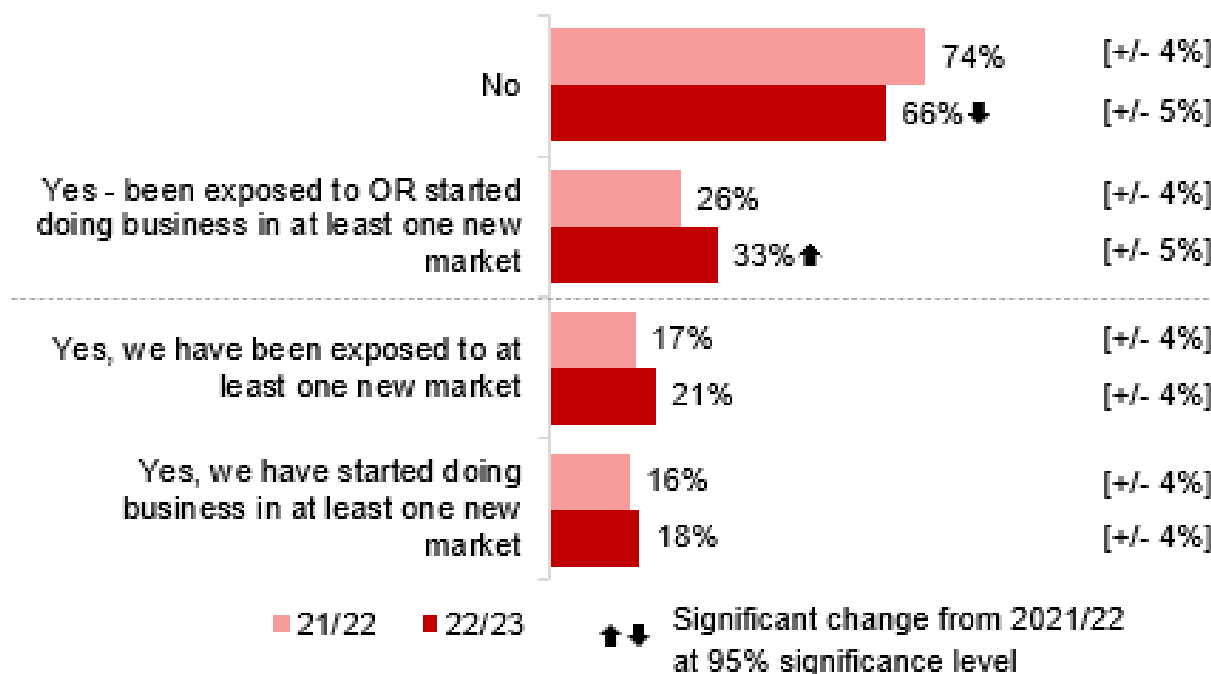
Description: Clustered bar chart comparing whether new contracts won with DBT help represented expansion into new or existing markets in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

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 service¹⁶ (Chart 4.1.15). Similar proportions of businesses said they had been exposed to at least one new market (21%) and had started doing business in at least one new market (18%) as a result

¹⁶ 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.

of using the ITA service. In total, a third (33%) said they had either been exposed to, or had started doing business in, at least one new market, higher than in 2021/22 (26%).

Chart 4.1.15 Whether increased exposure or starting business in a new overseas market – ITAs



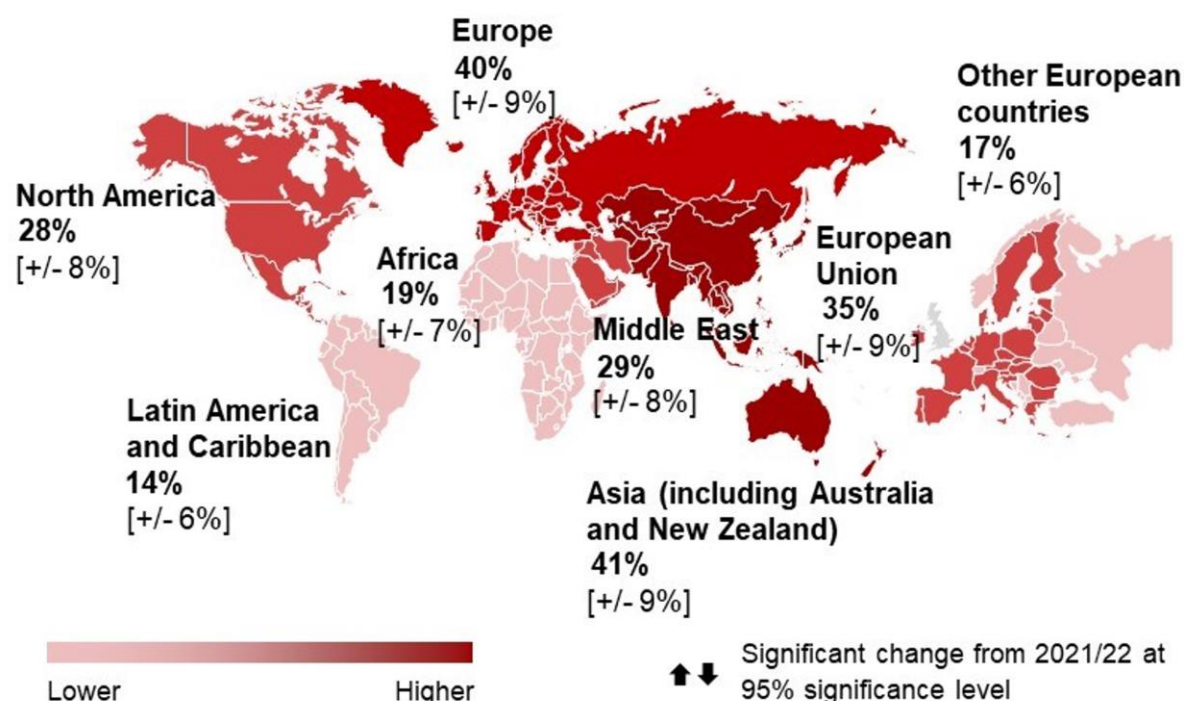
Caption: QGrowthDBT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?
 Base: All businesses that used International Trade Advisors (ITAs) (n=551 (2022/23), n=563 (2021/22))

Description: Clustered bar chart comparing whether increased exposure or starting business in a new overseas market in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

The most common new markets for increased exposure or business were Asia (including Australia and New Zealand) (41%) and Europe (40%), followed by the Middle East (29%) and North America (28%). This can be seen below in Chart 4.1.16 and Table 4.1.2. Looking in more detail at Europe, 35% reported that their increased exposure or new business was within the European Union, while 17% had new or increased exposure in other European countries.

Compared to the previous year, Asia replaced Europe as the most common new market for increased exposure or business. Otherwise, results remained in line with the previous year.

Chart 4.1.16 The new markets that the organisations have started doing business in or been exposed to – ITAs



Caption: QNewRegion: Which of the following new markets has your business started doing business in or been exposed to?

Base: All businesses that used International Trade Advisors (ITAs) and have had increased exposure to, or started doing business in at least one new market (n=168 (2022/23), n=147 (2021/22))

Description: A map of the world. Regions that businesses have done more business in or are more exposed to are shown as darker. The main findings were presented in the text preceding the chart.

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

Region	2021/22	CI (+/-)	2022/23	CI (+/-)	Change ¹⁷
Europe	42%	9%	40%	9%	-
European Union	33%	9%	35%	9%	-
Other European countries	19%	8%	17%	6%	-
Asia (including Australia and New Zealand)	37%	9%	41%	9%	-
Middle East	28%	9%	29%	8%	-
North America	28%	8%	28%	8%	-
Africa	22%	9%	19%	7%	-

¹⁷ Charts and tables represent a statistically significant increase from 2021/22 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

Latin America and Caribbean	14%	6%	14%	6%	-
Base	147		168		

4.1.8 Barriers to exporting

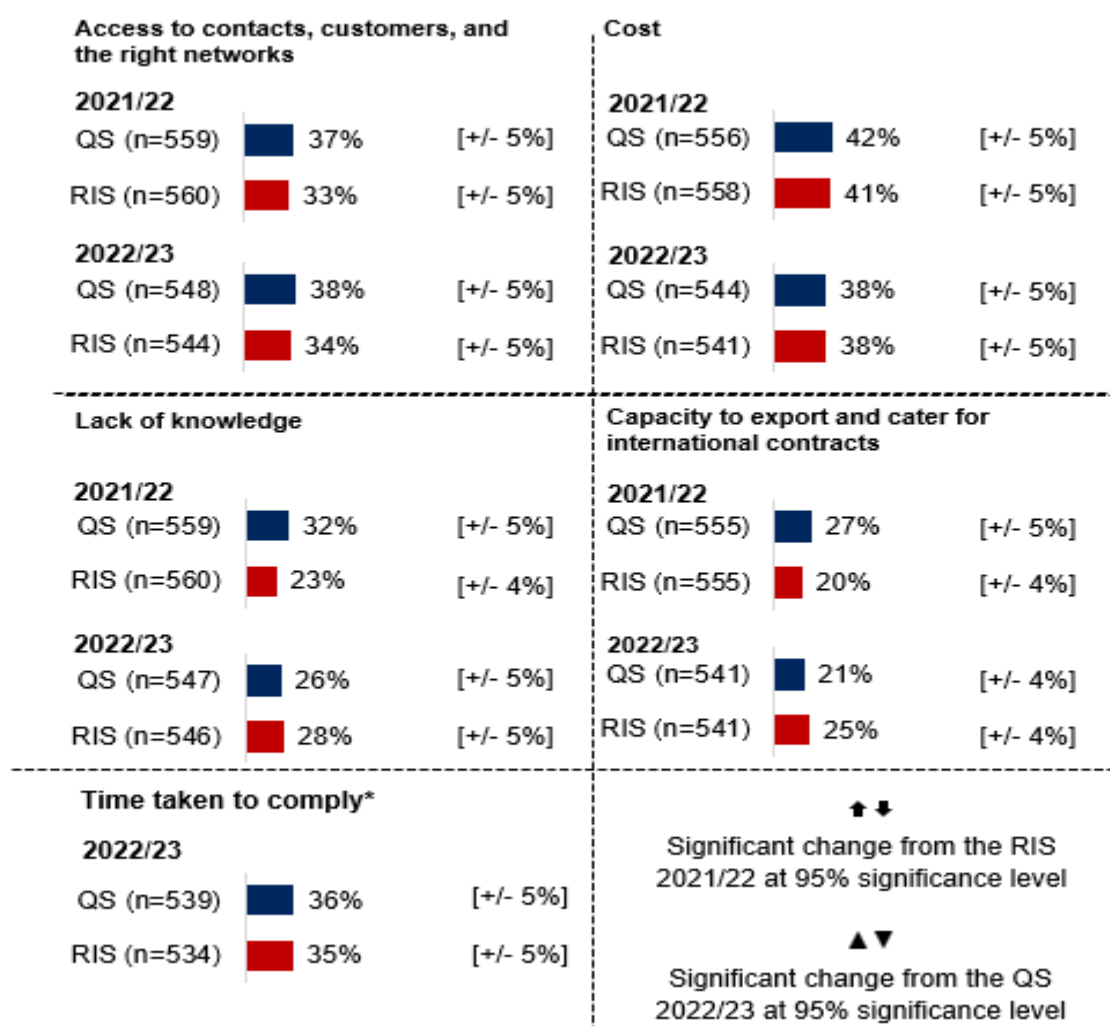
Businesses were asked in both the QS and RIS about five **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all)¹⁸ (Chart 4.1.17).

The top barrier in the RIS 2022/23 was 'cost' (38%), followed by 'the time taken to comply' (35%) and 'access to contacts, customers and the right networks' (34%). Results were consistent with the QS 2022/23 and with the RIS 2021/22.

Businesses with a turnover of less than £500,000 were more likely to report 'capacity' as a barrier (32%) than those with a turnover of £500,000 or more (16%).

¹⁸ 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 4.1.17 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – ITAs¹⁹



Caption: 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 the service not including those who gave a 'not applicable' answer.
*Code amended or added in 2022/23

Description: A set of horizontal bar charts comparing the proportion of QS and RIS respondents encountered barriers. The barriers include access to contacts, customers and the right networks, cost, lack of knowledge, capacity to export and cater for international contracts and time taken to comply.

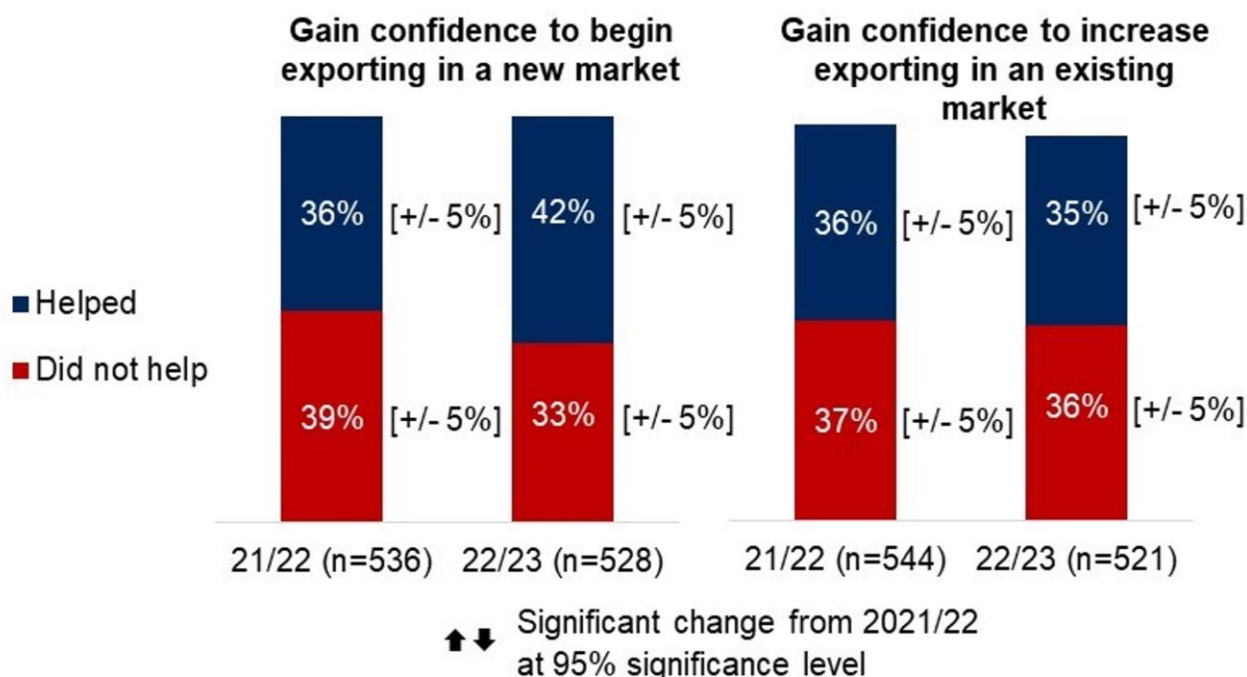
4.1.9 Wider benefits of the service

Businesses were asked to think about the extent to which using the ITA service had **helped them gain confidence** to begin exporting in a new market or increase exporting in an existing market (Chart 4.1.18). 4 in 10 businesses reported that using the ITA service

¹⁹ 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.

had helped them gain confidence to begin exporting in a new market (42%), higher than the proportion that said they had not been helped in this way (33%). Around a third (35%) said that using the ITA service had helped them gain confidence to increase exporting in an existing market, while a similar proportion (36%) said the service had not helped them do this. Results were in line with the previous year.

Chart 4.1.18 To what extent using the ITA service helped to build confidence to export – ITAs



Caption: 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 the service help you to ...? Helped (7-10), Neutral (4-6), Did not help (0-3).

Base: All businesses that used the service not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

Description: Stacked bar chart comparing confidence in exporting between QS and RIS in 2021/22 and 2022/23. The main findings were presented in the text preceding the chart.

Businesses were asked to think about the extent to which the service had **helped them improve their knowledge**.²⁰ Chart 4.1.19 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 DBT and elsewhere)**. Four in ten (41%) said the service helped to do this, and less than three in ten (27%) said it did not help them do this.

Equal proportions said that using the ITA service was helpful (34%) and not helpful (33%) **for increasing their knowledge of export opportunities available**.

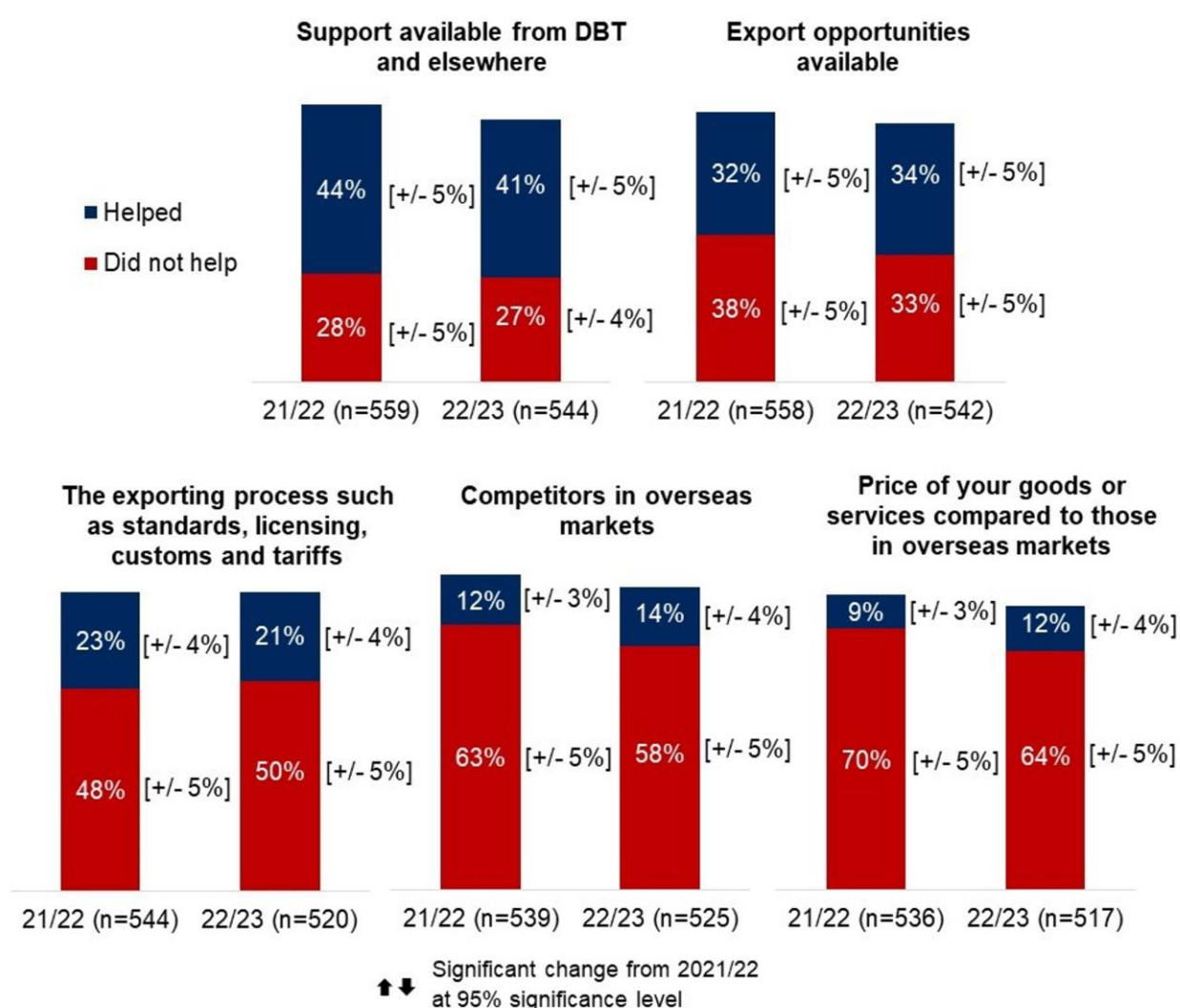
²⁰ Businesses were asked to rate these factors on a scale from 10 (helped a lot) to 0 (did not help at all).

Half (50%) 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 (21%) of businesses that had used ITAs said the service did help them in this way.

Relatively small proportions said that using ITAs improved their **knowledge about their competitors in overseas markets** (14%) or of **the price of goods** compared with those in overseas markets (12%).

These findings were in line with the previous year (2021/22).

Chart 4.1.19 To what extent the business felt that their knowledge has improved as a result of using the service – ITAs



Caption: QImproveKnowledge: Using the same scale, to what extent do you feel that your business improved its knowledge of the following as a result of the service? Helped (7-10), Neutral (4-6), Did not help (0-3).

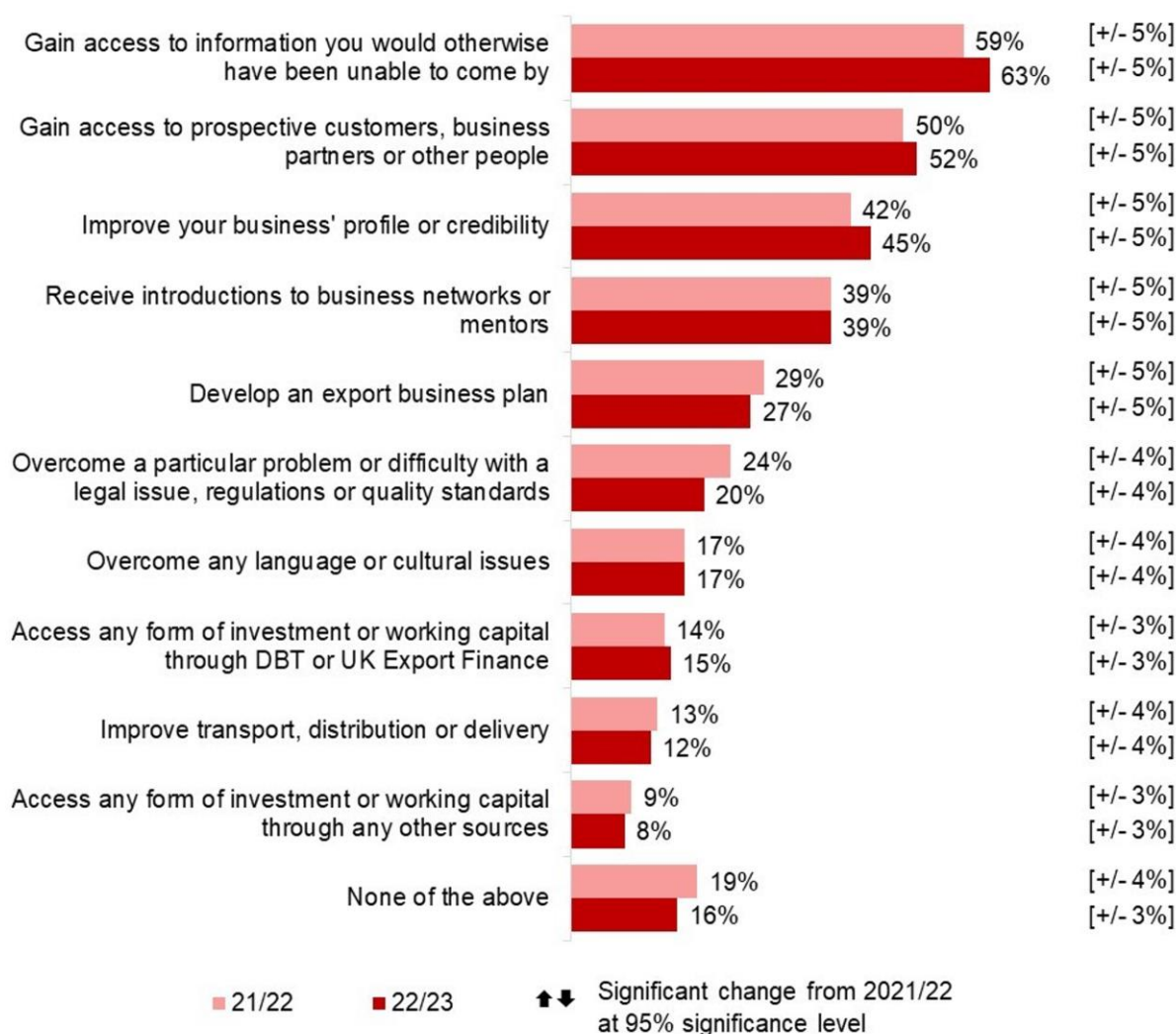
Base: All businesses that used the service not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown

Description: Five stacked bar chart comparing the extent to which businesses felt their knowledge had improved as a result of using the service, between QS and RIS in 2021/22 and 2022/23. The main findings were presented in the text preceding the chart.

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.²¹ A detailed breakdown of responses is shown in Chart 4.1.20.

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 (52%). 1 in 6 (16%) felt that using the ITA service had not helped them in any of the ways listed. Results were in line with the previous year.

Chart 4.1.20 In what ways has the business felt it had benefited from DBT support – ITAs



²¹ Respondents were asked to select from a pre-coded list and had the option to provide an 'other' answer

Caption: QServiceBenefit: in which of the following ways if any, has your business benefited specifically from the service over the last year?

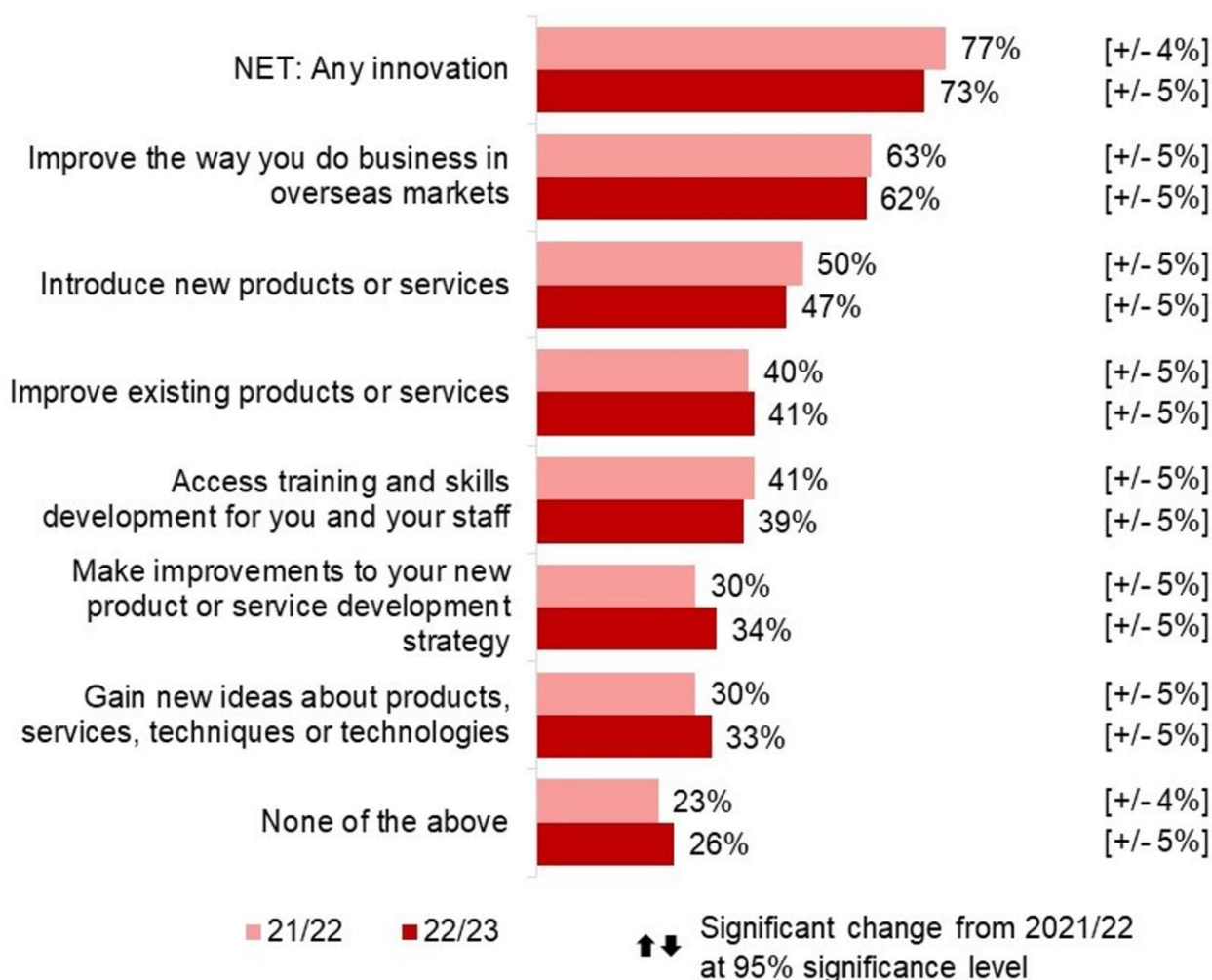
Base: All businesses that used International Trade Advisors (ITAs) (n=551 (2022/23), n=563 (2021/22))

Description: Clustered bar chart comparing how businesses felt they had benefitted from DBT support in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

Businesses were asked whether using the ITA service had helped, or was likely to help, support innovation and/or development in their business (Chart 4.1.21). Three quarters (73%) 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 (62%), to introduce new products or services (47%), to improve existing products or services (41%) and to access training and skills for themselves or their staff (39%).

Businesses with a turnover of less than £500,000 were more likely to have say the service had helped them make improvements to their new product or service development strategy (40%) than those with a turnover of £500,000 or more (28%). Results were in line with the previous year.

Chart 4.1.21 Whether the service has / is likely to help innovation and development – ITAs



Caption: QInnovationSupport: Has this service helped or do you expect it to help your business with development and/or innovation?

Base: All businesses that used International Trade Advisors (ITAs) (n=551 (2022/23), n=563 (2021/22))

Description: Clustered bar chart comparing if businesses felt the service had been or is likely to help innovation and development in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

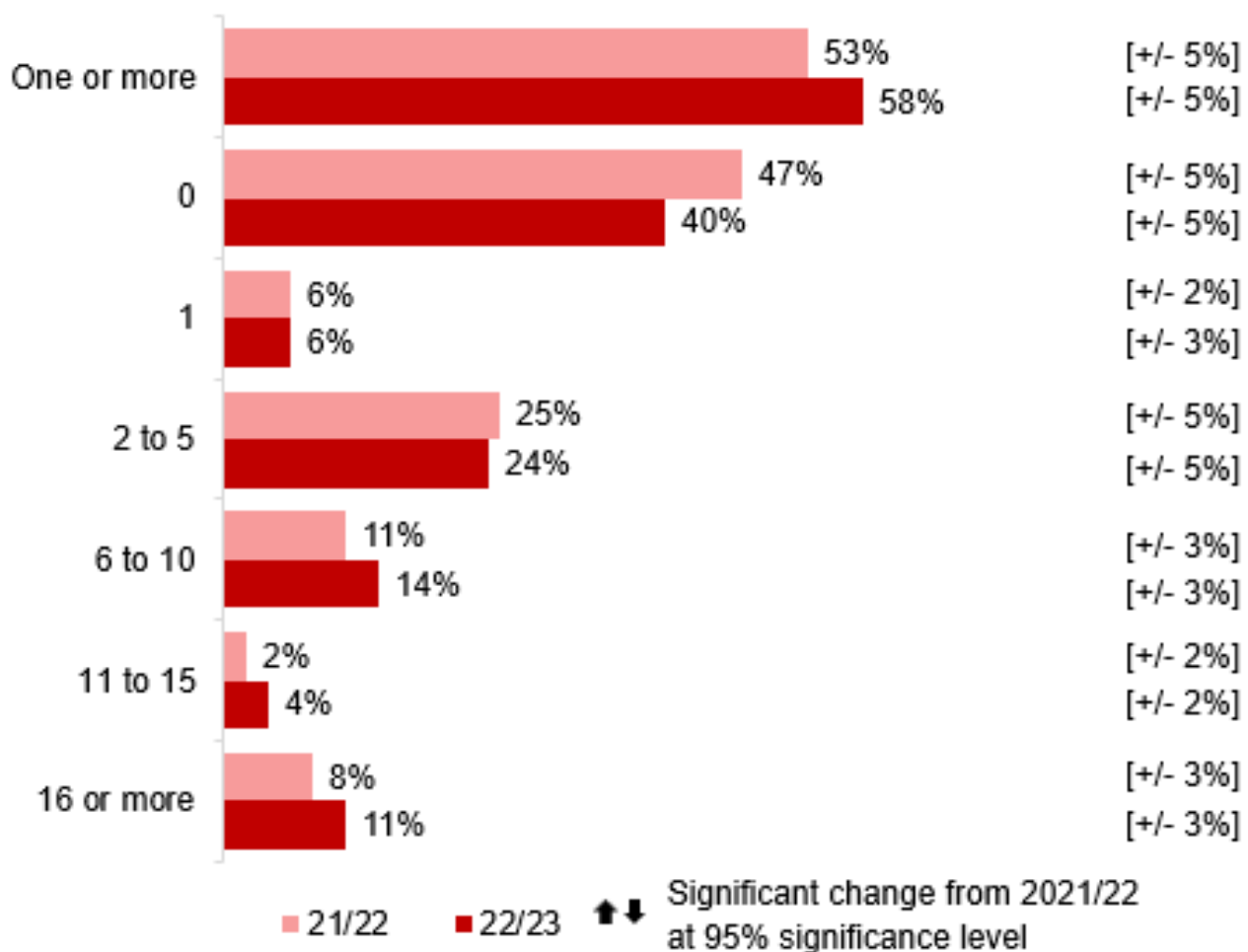
International contacts

Businesses were asked how many overseas contacts they had made as a result of using ITAs over the past year (Chart 4.1.22). The majority (58%) of businesses made at least one new overseas contact in the year since using the ITA service. This was in line with the previous year (53% in the RIS 2021/22).

A quarter (24%) made between two and five new contacts. Around 1 in 10 (11%) reported making a substantial amount of new contacts as result of using ITAs over the past year (16 or more new contacts). 2 in 5 (40%) reported that they had not made any new contacts as a result of using the ITA service. These findings were in line with the RIS 2021/22.

The average (mean) number of contacts made was four, which was an increase from the RIS 2021/22 average of three.

Chart 4.1.22 Number of new overseas contacts made in previous 12 months – ITAs



Caption: QContactsMade: How many new overseas contracts, if any, did your business make as a result of the service in the past year?

Base: All businesses that used International Trade Advisors (ITAs) (n=551 (2022/23), n=563 (2021/22))

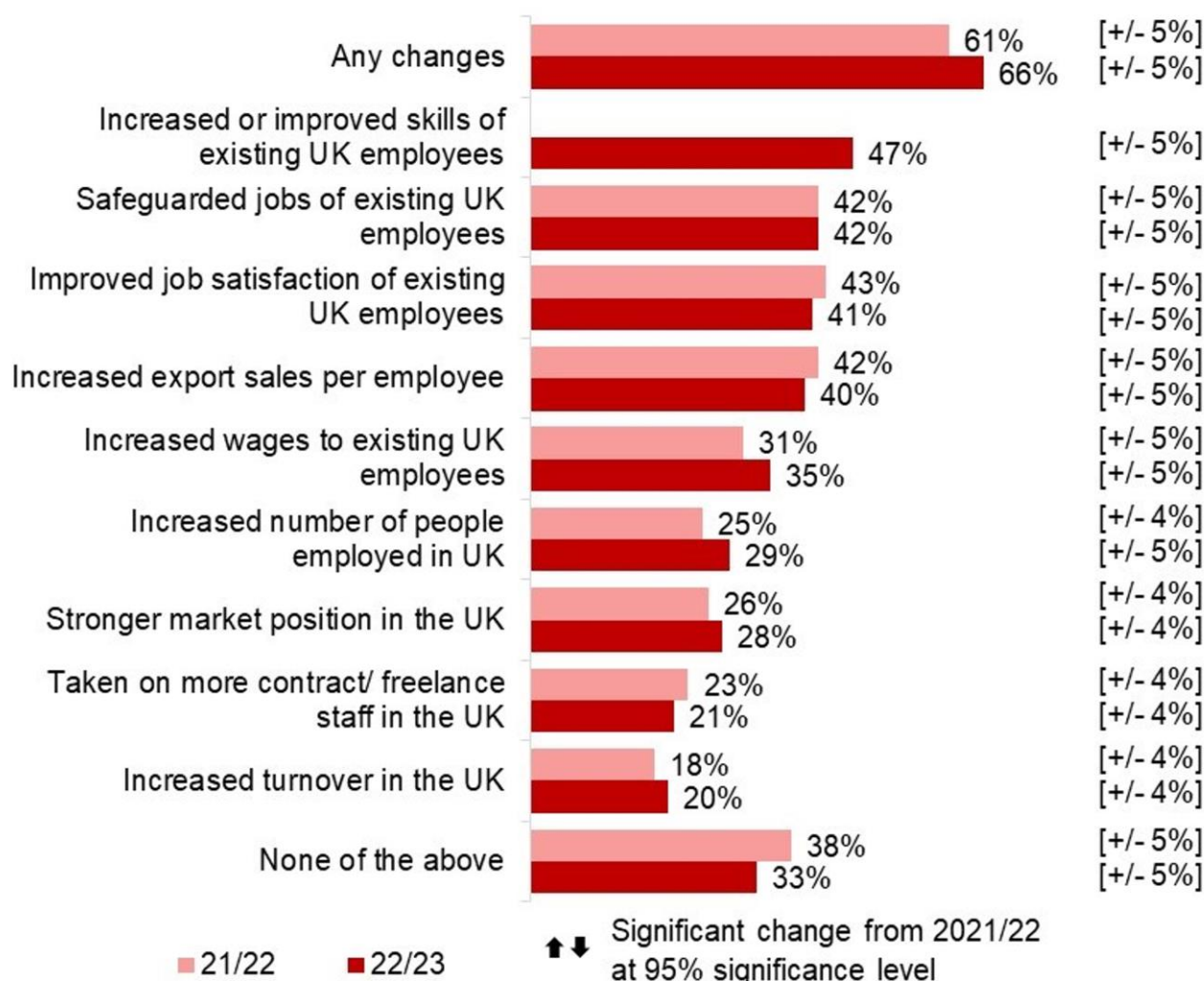
Description: Clustered bar chart comparing the number of new overseas contacts made in the previous 12 months in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

Businesses were asked about the impact they had seen or expected to see as a direct result of using the ITA service (Chart 4.1.23). Almost half of businesses said they thought using the ITA service had, or would, increase or improve the skills of existing UK employees (47%). Two fifths of businesses said they thought using the ITA service had, or would, safeguard jobs in the UK (42%), improve job satisfaction among existing UK employees (41%) or increase export sales per employee (40%).

Businesses with an annual turnover of £500,000 or more were more likely than those with turnover below £500,000 to have seen, or have expected to see, an increased number of people employed in the UK (35% and 20% respectively).

Results were in line with the RIS 2021/22.

Chart 4.1.23 Changes expected / seen in the UK business as a result of receiving the service – ITAs



Caption: QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service?

Base: All businesses that used International Trade Advisors (ITAs) (n=551 (2022/23), n=563 (2021/22))

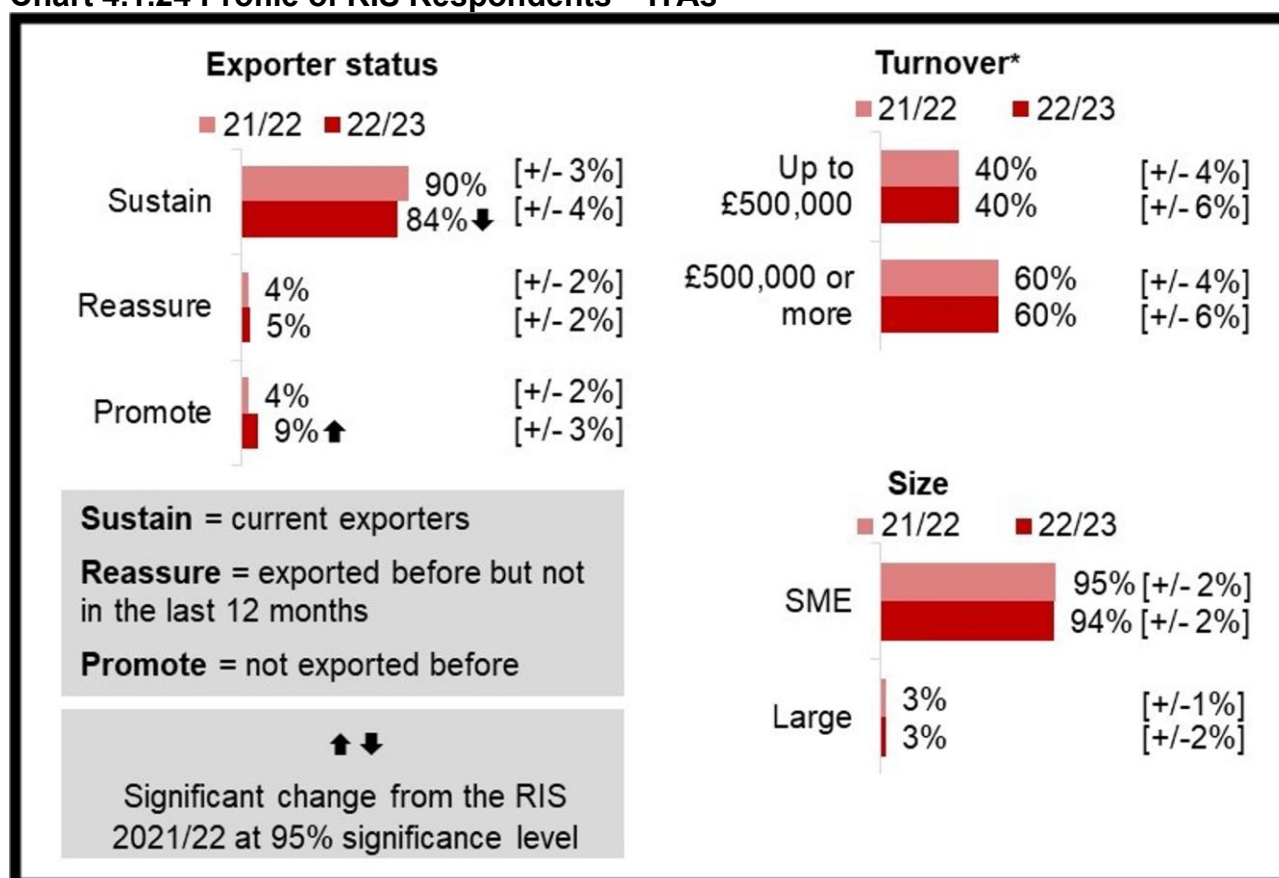
Description: Clustered bar chart comparing changes expected or seen in the business as a result of using the service in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

4.1.10 Profile of respondents

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), more than 8 in 10 (84%) were exporters, meaning they were exporting at the time of service use or in the last 12 months (Chart 4.1.24). This was lower than in the RIS 2021/22 (90%). The turnover and size profiles of the businesses supported by ITAs in the survey remained in line with the previous year.²²

²² 'Don't know' and 'Refused' responses have been removed from Turnover.

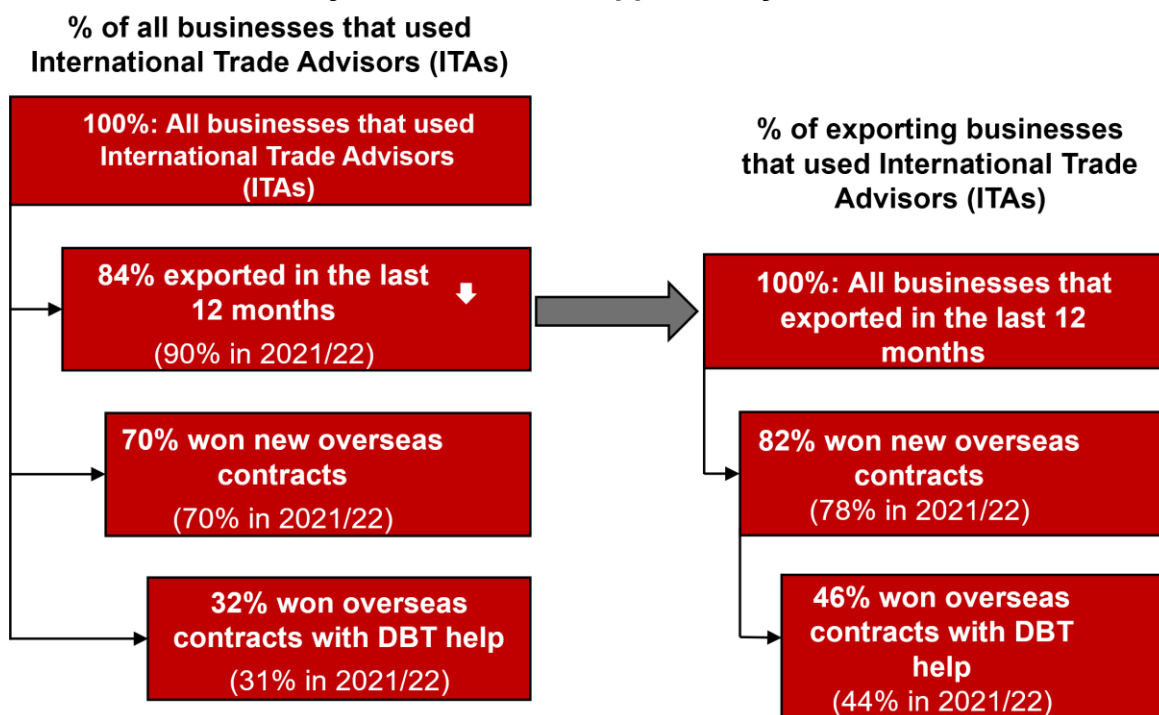
Chart 4.1.24 Profile of RIS Respondents – ITAs



Caption: Base: All businesses that used International Trade Advisors (ITAs) (n=551 (2022/23), n=563 (2021/22)); *All businesses that used International Trade Advisors (ITAs) not including 'Don't know' and 'Refused' responses (n=381 (2022/23), n=462 (2021/22))

Description: Three clustered bar charts comparing exporter status, turnover and size in 2022/23 and 2021/22. The main findings were presented in the text preceding the chart.

Chart 4.1.25 Summary of businesses supported by ITAs



Median value of export sales won per business with DBT support:

£90,190 (£74,097 in 2021/22)

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

Caption: Base: All businesses that used International Trade Advisors (ITAs) (n=551 (2022/23), n=563 (2021/22)); All businesses that used International Trade Advisors (ITAs) and that exported in the last 12 months (n=475 (2022/23), n=516 (2021/22)); All businesses that used International Trade Advisors (ITAs) and that won at least one overseas business contract in the last 12 months (n=378 (2022/23), n=386 (2021/22)); All businesses that used International Trade Advisors (ITAs) and that won at least one overseas business contract with the help of DBT (n=173 (2022/23), n=166 (2021/22))

Description: Flow chart showing how the proportion of overseas contracts won with DBT help is calculated. These findings are described in detail earlier in this chapter.

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 DBT'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 168 businesses that used Posts between April 2022 and March 2023 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, 7 in 10 businesses had identified new export opportunities or made new contacts (72%), while over half had researched the paperwork and regulations needed to export (55%). Among non-exporters, almost two thirds of businesses (63%) had assessed their readiness to export after using Posts. Results were in line with the previous year.

Impact on exporting

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) in the RIS was 85%, similar to the QS 2022/23 (83%).

Impact on winning contracts

Of the businesses that exported, 8 in 10 (81%) reported winning new overseas business contracts or gaining extensions to existing overseas contracts in the past year since using the Posts service, in line with the previous year.

Overall, two thirds (67%) of businesses won a new overseas contract. This included a quarter (24%) who said this was with assistance from Posts or DBT.

Among businesses that reported that DBT support was important in helping them win these contracts, 10% said they would have been unlikely to be able to do this without DBT. These findings were in line with the previous year.

Impact on exposure and growth

7 in 10 (71%) businesses who won any new overseas business contracts with the help of DBT said Posts assisted with expansion into a new market, and 8 in 10 (81%) said Posts assisted with expansion within an existing market. These results are in line with the previous year.

Among all businesses, a quarter (26%) reported being exposed to or starting to do business in at least one new market. Compared to the previous year, these businesses were less likely to report increased exposure or new business in Europe (31%, down from 60% in 2021/22), and this applied both to the European Union (24%, down from 48%) and

other European countries (14%, down from 35%). Asia replaced Europe as the most common new market for increased exposure or business.

Impact on contacts and networks

Around 6 in 10 businesses (62%) made at least one new overseas contact after using Posts. The median number of contacts made was 2, compared with 1 in 2021/22.

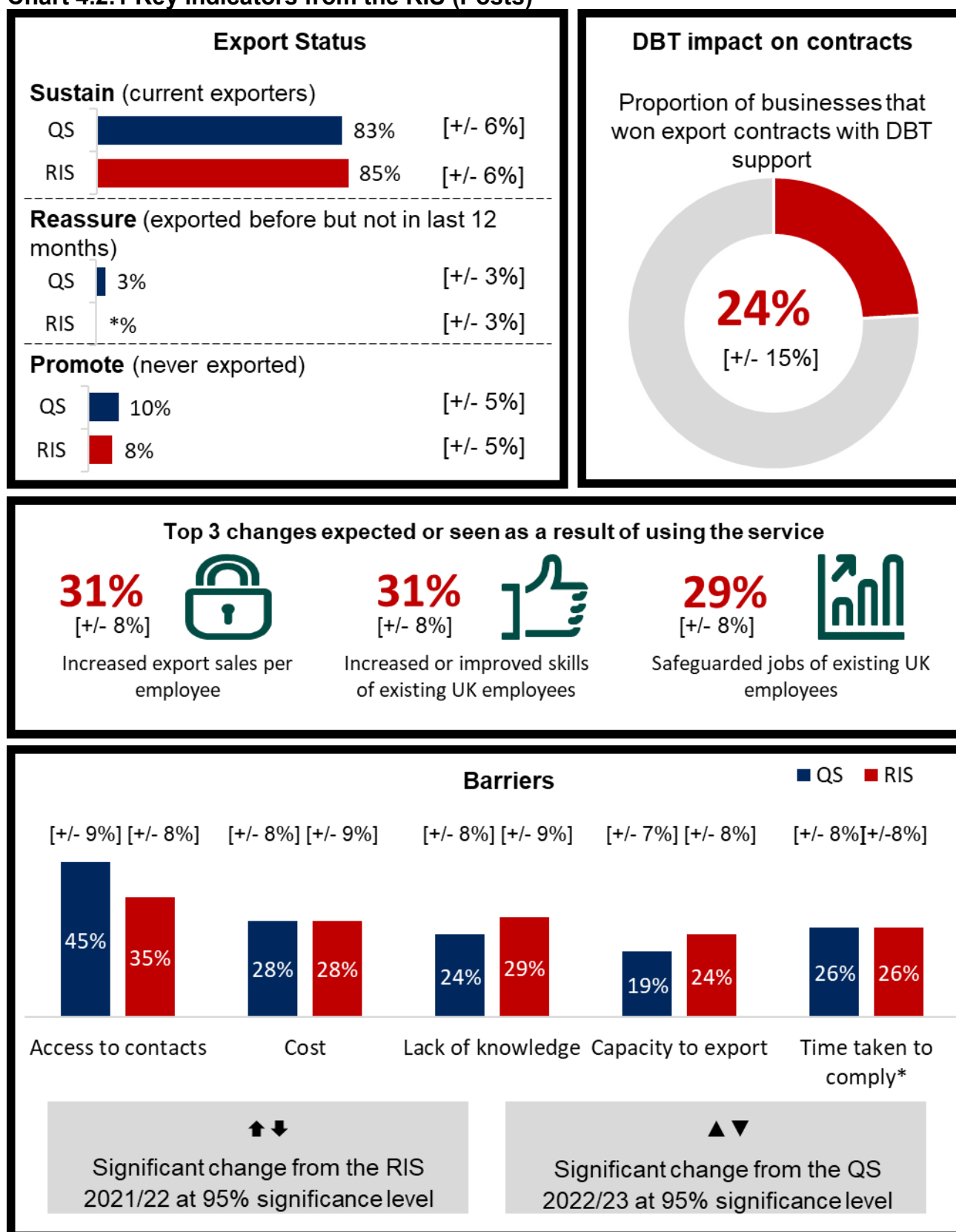
Impact on confidence

A third (32%) of businesses reported that using the Posts service had given them confidence to begin exporting in a new market, while 30% said this for increasing exports in an existing market. These findings were in line with the previous year.

Other impact

Around half of businesses reported that the Posts service helped them gain access to prospective customers or business partners (54%) or to gain access to information that they would otherwise have been unable to come by (51%). Compared to the RIS 2021/22, there was a decrease in the proportion of businesses that said they overcame any language or cultural issues, from 20% to 11%. There were no other significant changes compared to the RIS 2021/22.

Chart 4.2.1 Key indicators from the RIS (Posts)



Caption: Base: All businesses that used Posts and completed both surveys (n=168);
 Barriers - Access to contacts (QS n=167, RIS n=165), Cost (QS n=165, RIS n=164), Lack of knowledge (QS n=165, RIS n=165), Capacity to export (QS n=166, RIS n=164), Time to

comply (QS n=160, RIS n=162 * Redacted due to small base size. *Code amended or added in 2022/23.

Description: A collection of charts showing headline findings for businesses using the service. This includes findings for export status, DBT impact on contracts, changes expected or seen as a result of using the service and barriers. These findings are described in more detail throughout this chapter.

4.2.2 Satisfaction with Posts (from Quality Survey)

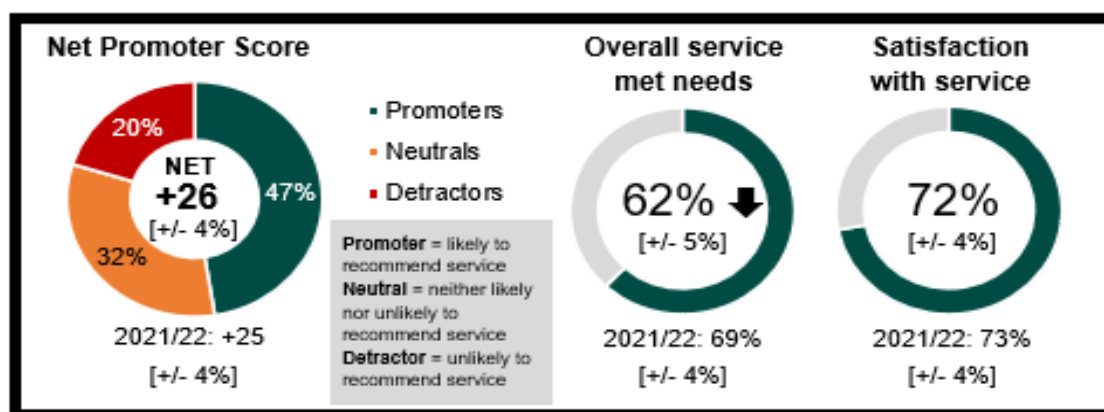
In the QS 2022/23, nearly half of businesses (47%) that used Posts said they would recommend the service, while 1 in 5 (20%) said they would not. This gave Posts a Net Promoter Score (NPS) of +26. 7 in 10 (72%) reported they were satisfied with the Posts service, and 6 in 10 (62%) said the overall service met their needs. These results were in line with the previous year.

Posts users were particularly positive about how straightforward the registration process was (81%), staff knowledge (80%), the organisation of the service (78%) and the amount of time taken to receive information (77%). Compared with the previous year, businesses were less likely to be positive about staff knowledge (80% compared to 85% in 2021/22) and the organisation of the service (78% compared to 86% in 2021/22).

As a result of using Posts, around half of businesses (48%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all Posts users, over 3 in 5 said they had identified new export opportunities or made new contacts (63%). A third (34%) said they had researched the paperwork and regulations needed to export. Compared with the previous year, businesses were more likely to say they had used other export services (17% compared to 12% in 2021/22) or secured finance or funding (13% compared to 8% in 2021/22).

Posts respondents were most likely to report that 'access to networks' (39%) was a barrier to exporting, followed by 'cost' (34%). Businesses were less likely to report 'lack of knowledge' as a barrier than last year (26% compared to 32% in 2021/22). Otherwise, the findings were in line with the previous year.

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



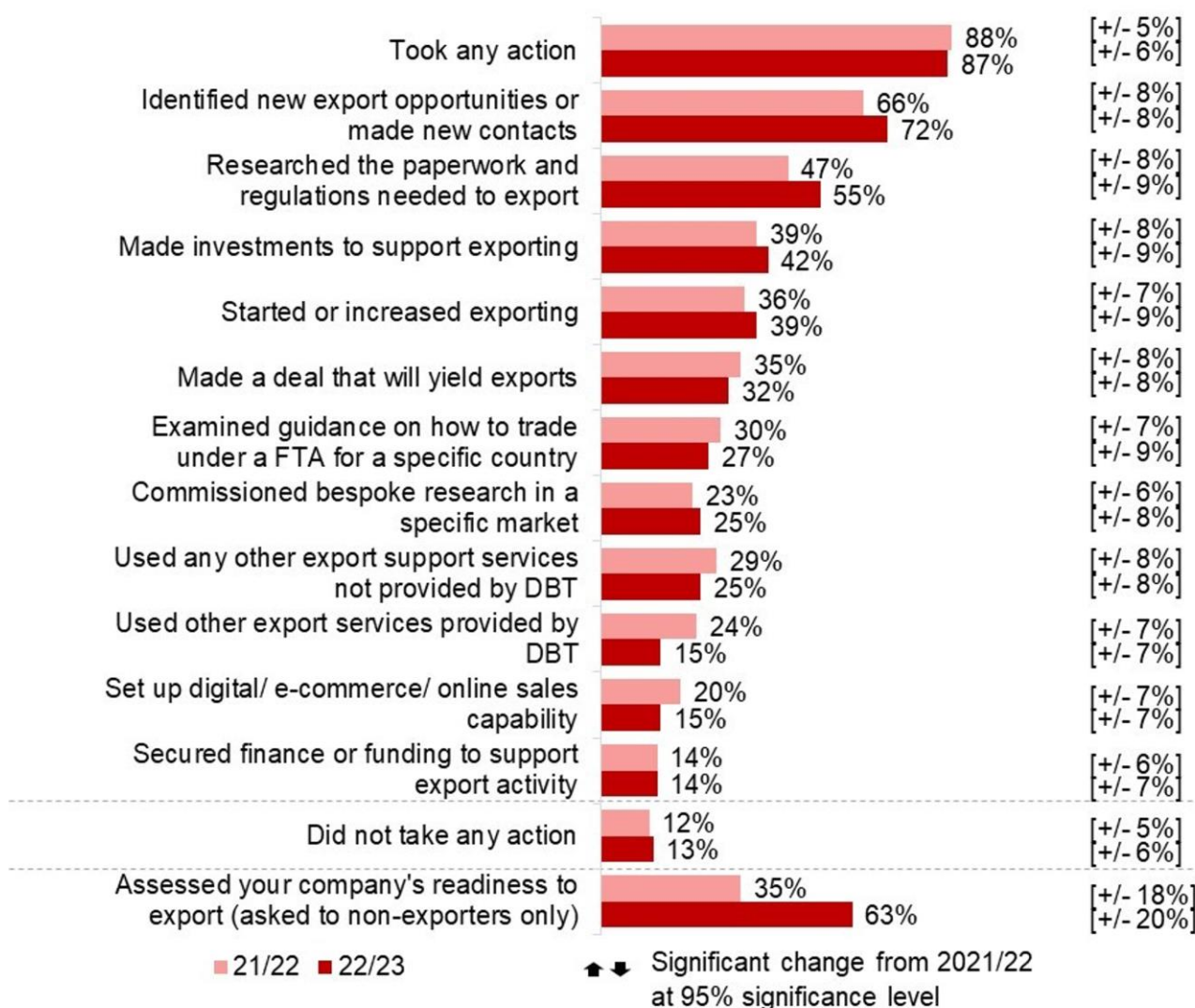
Caption: Base: All businesses who used the service (n=685 (2021/22), n=509 (2022/23)); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=661 (2021/22), n=489 (2022/23)); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=665 (2021/22), n=500 (2022/23))

Description: A collection of three circle charts, showing the NPS score – broken down into Promoters, Neutrals and Detractors – followed by the percentage that thought the overall service met needs, and the percentage satisfaction with service.

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). Almost 9 in 10 businesses (87%) reported taking any action. 7 in 10 businesses had identified new export opportunities or made new contacts (72%), while over half had researched the paperwork and regulations needed to export (55%). Almost two thirds of businesses (63%) that were not exporting had assessed their business' readiness to export. Results were in line with the previous year.

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

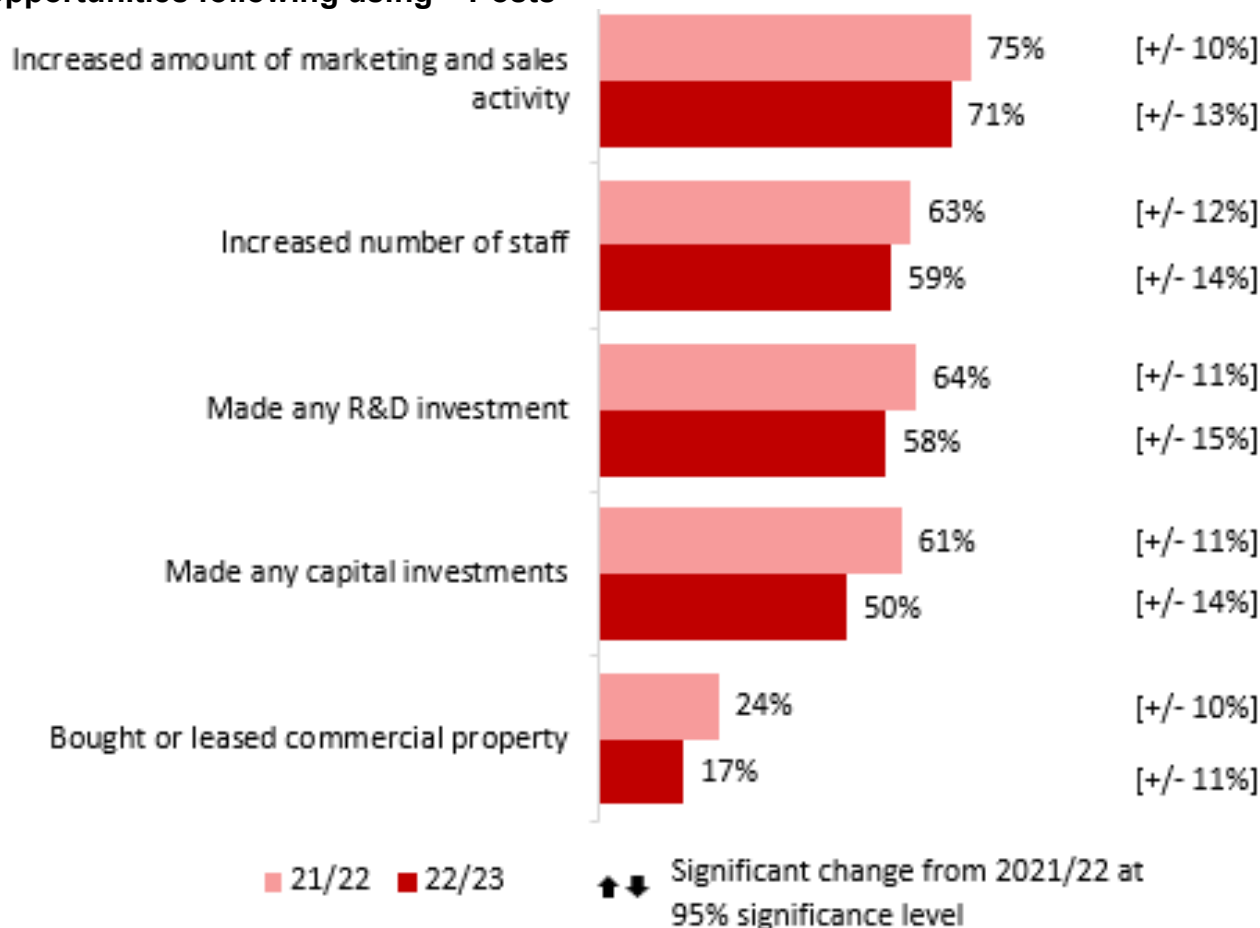


Caption: QResultService: What has your business done as a result of the service?
 Base: All businesses that used Posts (n=168 (2022/23), n=228 (2021/22)); All businesses that used Posts and were non-exporters (n=24 (2022/23), n=36 (2021/22))

Description: Clustered bar chart comparing what businesses have done as a result of using the service in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Businesses that had made an investment as a result of using the Posts service (70 respondents) were asked what investments they had made (Chart 4.2.4). The most common answer was an increase in marketing and sales activity (71%), followed by an increase in staff numbers (59%), R&D investment (58%), or making capital investments (50%). Results were in line with the previous year.

Chart 4.2.4 Type of investments made to support new or increased export opportunities following using – Posts



Caption: QInvestmentMade: Which of the following investments has your business made to support new or increased export opportunities?
 Base: All businesses that used Posts and made investments to support exporting as a result of using Posts (n=70 (2022/23), n=91 (2021/22))

Description: Clustered bar chart comparing what type of investments businesses have made to support new or increased export opportunities following using Posts in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Businesses were asked what organisations they had been in contact with since using Posts (Chart 4.2.5). A third had been in contact with the Chambers of Commerce in the UK (34%) and a quarter with Innovate UK (25%). 3 in 10 (31%) businesses had not been in contact with any other organisations regarding assistance with overseas trade. Results were in line with the previous year.

Chart 4.2.5 What organisations respondents have been in contact with since receiving the service – Posts



Caption: QAnyContact: Since your business used the service 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=168 (2022/23), n=228 (2021/22)). Coded responses with 5% or more in 2021/22 are included.

Description: Clustered bar chart comparing what organisations respondents have been in contact with since receiving the service in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

4.2.4 Reported impact on exporting

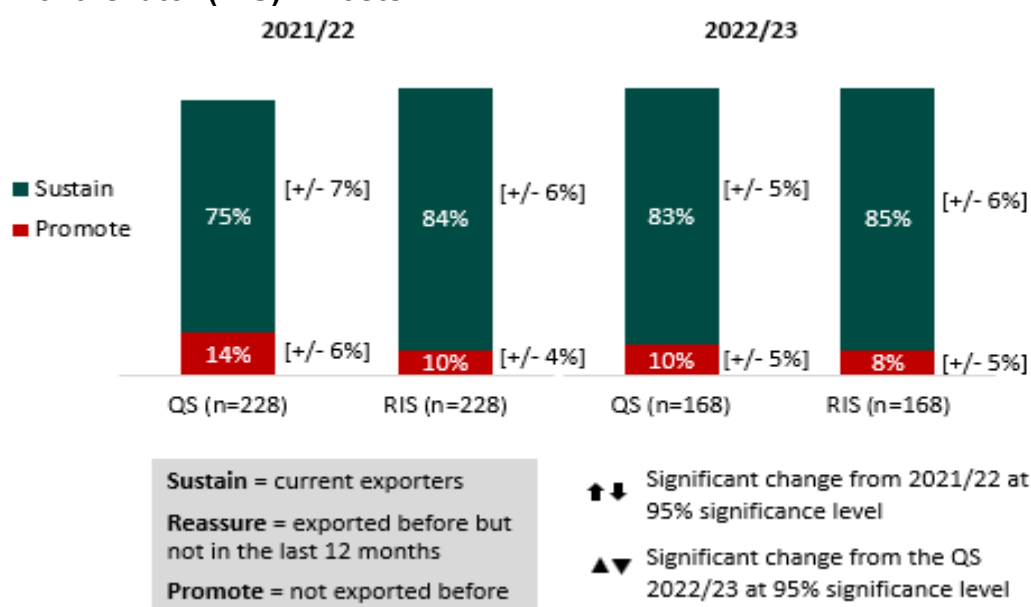
Businesses that used Posts were asked about their export status, both at the time they accessed the Posts service in the Quality Survey, and their export status 12 months later in the RIS. Responses from the 2 surveys were analysed to see whether the export status of these businesses has changed over this period. DBT 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. More than 8 in 10 businesses (83%) that

used Posts fell into this segment at the time of the service delivery (QS 2022/23). This was similar (85%) in the RIS 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. 1 in 10 (10%) that used Posts were in this segment at the time of the service delivery (QS 2022/23) and this remained similar (8%) in the RIS 12 months later.

Chart 4.2.6 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Posts



Caption: Source: Composite measure merging data from several variables.

Base: All businesses that used Posts and completed both surveys (Quality Survey: n=168 (2022/23), n=228 (2021/22); RIS: n=168 (2022/23), n=228 (2021/22))

Description: Stacked bar charts comparing the export status of respondents of the quality survey and 12 months later at the time of service delivery in 2022/23 to 2021/22, split between sustain and promote. The main findings were presented in the text preceding the chart.

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).

Around half (46%) businesses from the Reassure segment moved to Sustain, and 1% of businesses in the Sustain segment moved to Reassure.

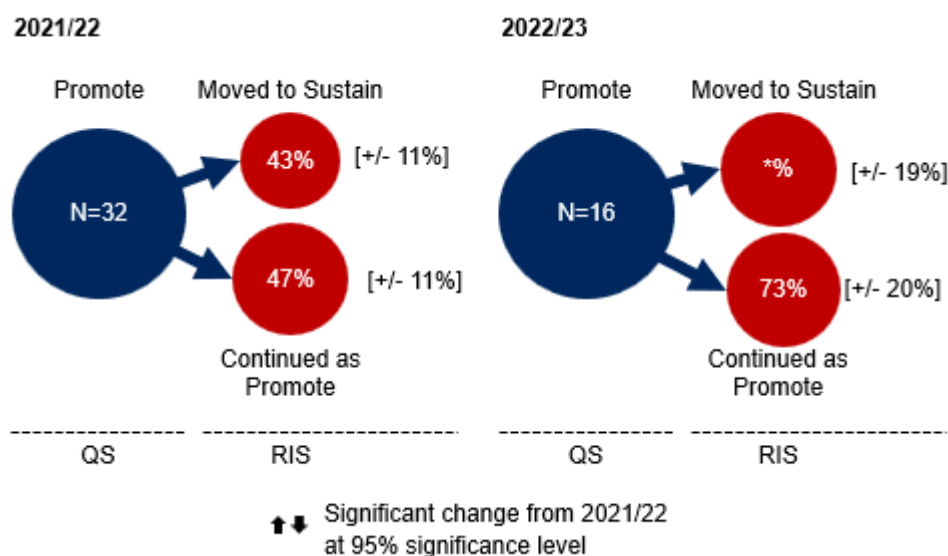
Table 4.2.1 Change in export status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Posts

Quality Survey Export status	RIS Export status	Percentage	Change since 2021/22
Sustain (n=144)	Sustain	97% [+/- 3%]	-
	Reassure	*% [+/- 1%]	-
	Promote	0% [+ 1%]	-

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. *Redacted due to small base size **Very small base size

Considering businesses that were in the Promote segment (never exported) at the time of the Quality Survey (16 businesses), 73% remained in Promote (Chart 4.2.7). On the other hand, considering businesses that were in the Sustain segment at the time of the Quality Survey (144 businesses), 97% continued in Sustain.

Chart 4.2.7 Exporter status reported at time of the service delivery (Quality Survey) and 12 months later (RIS) [rebased] – Posts



Caption: Source: Composite measure merging data from several variables. Base: All businesses that used Posts who were in the Promote segment in the Quality Survey: n=16 (2022/23), n=32 (2021/22). *Redacted due to small base size.

Description: Two charts showing the proportion of respondents who moved from 'Promote' status in the QS to 'Sustain' or 'Promote' in the RIS. One chart is for 2021/22 and the other is for 2022/23. The main findings were presented in the text preceding the chart.

4.2.5 Reported exported contracts achieved since receiving the service

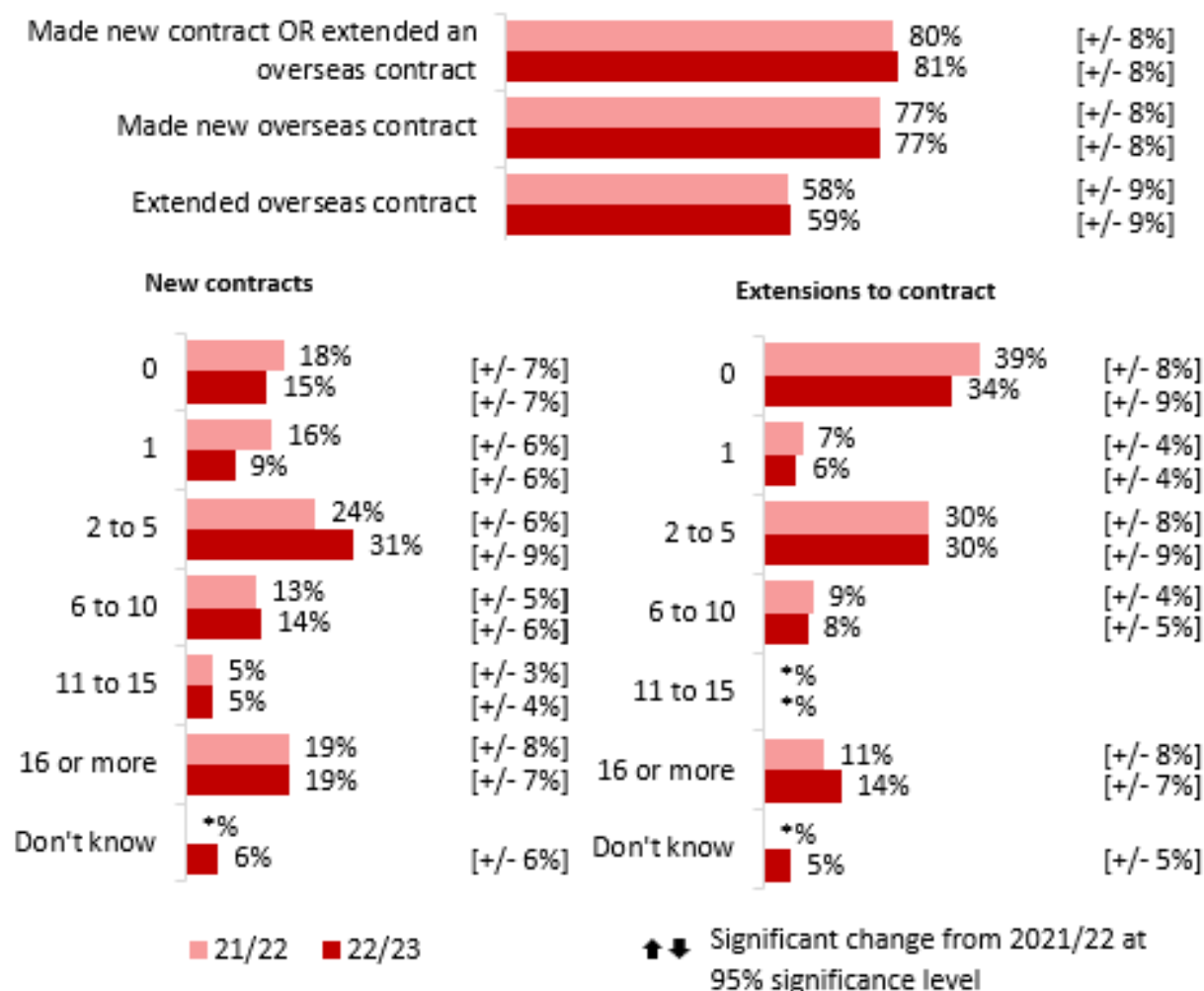
Businesses that had exported in the previous 12 months were asked if they had won any new export contracts, or extended any existing contracts, in the 12 months since using the Posts service (Chart 4.2.8). Businesses were asked to think about all contracts, not just those assisted by Posts or DBT.

Of the 148 businesses that were exporting or had exported in the previous 12 months, 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 was in line with the RIS 2021/22 (80%).

Around three-quarters (77%) of businesses that were exporting or had exported in the previous 12 months had won new overseas business contracts in the year since they used the service. Specifically, 9% had won one overseas contract, and 3 in 10 (31%) had won between 2 and 5 overseas contracts. 1 in 5 (19%) businesses had won 16 or more overseas contracts. The median number of contracts won among exporting businesses that had used Posts was 3. Results were in line with the previous year.

Around 6 in 10 businesses (59%) that were exporting or had exported in the previous 12 months reported that they had gained extensions to existing overseas business contracts in the year since they used the service, with 6% extending one contract, and 3 in 10 (30%) extending between 2 and 5 contracts. One in seven (14%) extended 16 or more existing overseas sales contracts. A third (34%) of businesses had not extended any existing contracts. The median number of contracts extended (including those that did not extend any) was one. Results were in line with the RIS 2021/22.

Chart 4.2.8 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 – Posts



Caption: QNewcontract: How many new overseas business contracts for export sales did you win in the past year?
 QExtendcontract: 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=148 (2022/23), n=198 (2021/22)); All businesses that used Posts and were currently selling, or had previously sold goods or services overseas in the previous 12 months, and that answered how many new business contracts were won in the past year (n=145 (2022/23), n=193 (2021/22)).*Redacted due to small base size.

Description: A set of clustered bar charts comparing data between 2021/22 and 2022/23. One compares the proportion that made or extended overseas contracts, the second compares the proportion of numbers of new contracts, and the last compares the proportion of numbers of extensions to contracts. The main findings were presented in the text preceding the chart.

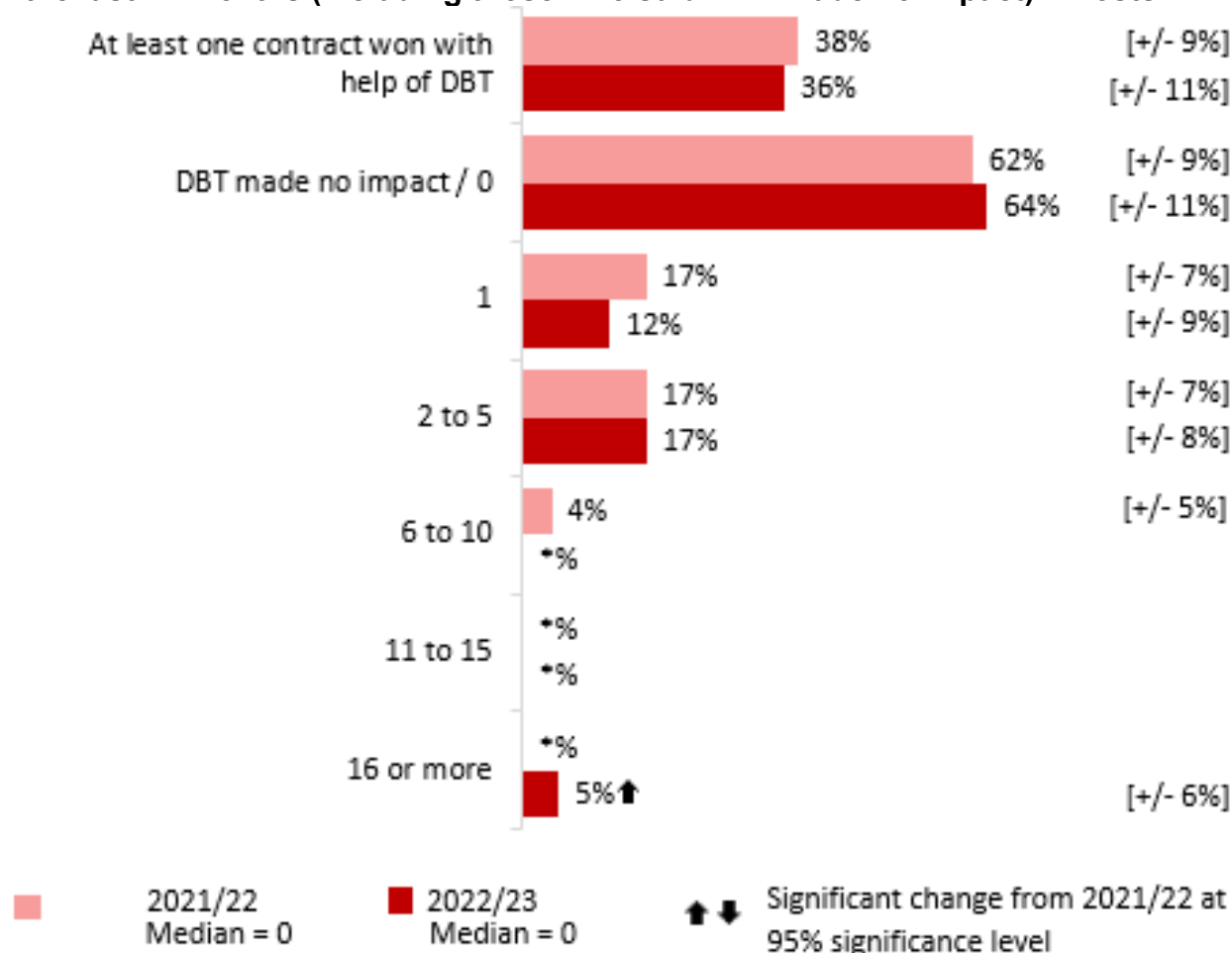
Reported additional contracts which were gained because of DBT support

Businesses that exported and had won at least one new contract in the 12 months since the delivery of the Posts service were asked whether they could estimate the number of contracts won with the assistance of Posts or DBT. In total, 114 businesses (that is 68% of the businesses that were interviewed overall) felt able to provide an estimate and were surveyed about their experiences.

As shown in Chart 4.2.9 below, around two thirds of these businesses (64%) said they won no new overseas sales contracts with the help of DBT or using DBT services made no impact. 1 in 8 (12%) had won one new overseas contract with the help of DBT, and 1 in 6 (17%) had won between 2 and 5 contracts. The median number of contracts that DBT helped win was zero, for current exporters that used Posts.

Businesses were more likely to report winning 16 or more new overseas contracts with the help of DBT (5%) than in the RIS 2021/22 (less than 1%). Otherwise, findings were in line with the previous year.

Chart 4.2.9 Number of new overseas contracts said to be won with the help of DBT in the last 12 months (including those who said DBT made no impact) – Posts



Caption: QContractDBT: 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 DBT?

QContractNumber: How many new overseas contracts were won with help from DBT?

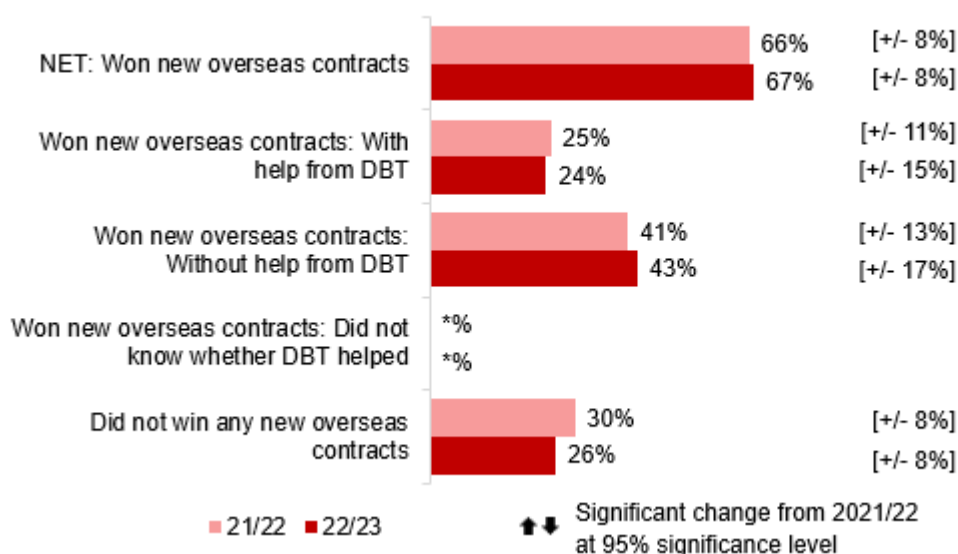
Base: All businesses that used Posts and were able to estimate the number and value of

new overseas business contracts that they won in the last 12 months (n=114 (2022/23), n=158 (2021/22)). *Redacted due to small base size. Median values include zero.

Description: Clustered bar chart comparing the number of new overseas contracts said to be won with the help of DBT in the last 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DBT (Chart 4.2.10). Among all businesses that had used Posts, 67% said they had won new overseas contracts (either with help from DBT, without help from DBT, or were unsure whether DBT helped). More specifically, we estimate that 24% of Posts respondents had won contracts with help from DBT, while 43% of Posts respondents said they had won contracts without help from DBT. These findings were in line with the previous year.

Chart 4.2.10 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 DBT support – Posts



Caption: Source: Composite measure merging data from several variables.

Base: All businesses that used Posts (n=168 (2022/23), n=228 (2021/22)), *Redacted due to small base sizes.

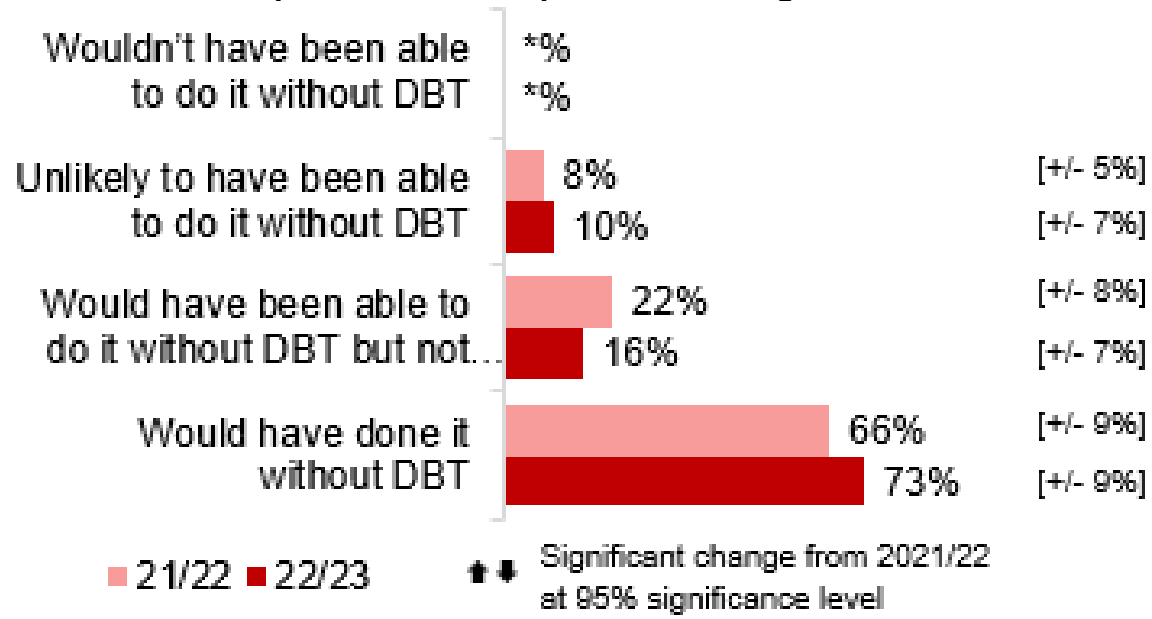
Description: Clustered bar chart comparing the proportion of businesses reported or estimated to have won or not won new overseas contracts with or without DBT support in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Importance of DBT's support in winning overseas contracts

The survey explored views on the importance of DBT'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 DBT in the last 12 months, since the delivery of the Posts service. Exporting businesses that said that DBT 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 DBT' to better understand the level of support that the Posts service provided.

Around a quarter of these businesses (27%) reported that DBT support was important in helping them win these contracts to some extent. This includes 1% who said they would not have been able to do it without DBT, and 10% who thought it was unlikely they could have done it without DBT. 1 in 6 (16%) thought they would not have been able to do it as quickly or easily without DBT support (Chart 4.2.11). The remaining 73% thought they would have been able to achieve the same outcome without DBT support. These results were in line with the previous year.

Chart 4.2.11 How important DBT's help was in winning overseas contracts – Posts



Caption: QContractHelp: How important was DBT's help in winning these overseas contracts?
Base: All businesses that used Posts and won any new overseas contracts in the past year (n=114 (2022/23), n=158 (2021/22), *Redacted due to small base sizes.

Description: Clustered bar chart comparing how important DBT's help was in winning overseas contracts in 2021/22 to 2020/21. The main findings were presented in the text preceding the chart.

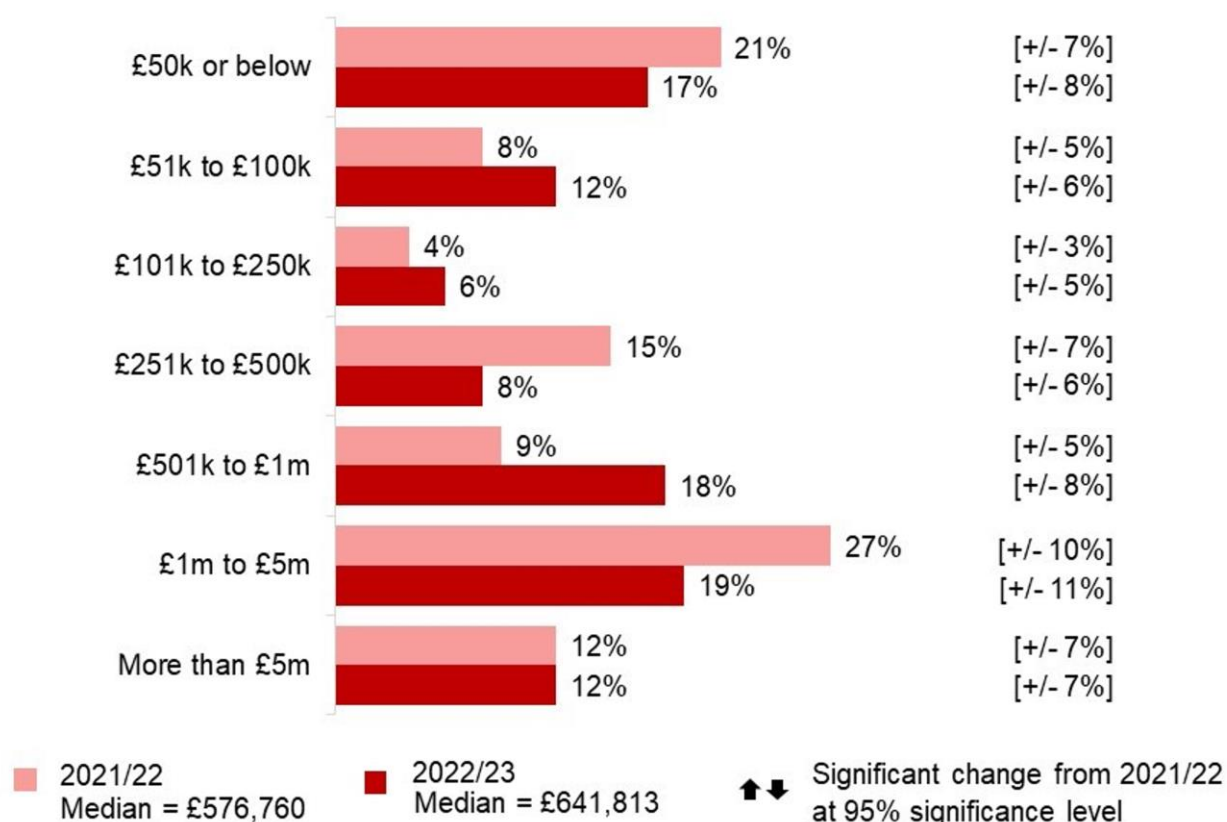
4.2.6 Reported value of export sales achieved since receiving the service

Reported value of the export sales of new contracts

The 68% 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 4.2.12). The median value of the export sales of all new overseas contracts for these businesses was £641,813 (compared to £576,760 in the RIS 2021/22).²³ 1 in 6 (17%) had won contracts with an export sales value of £50,000 or below. More than 1 in 10 (12%) had won contracts with an export sales value between £51,000 to £100,000, while 6% had won contracts with an export sales value between £101,000 to £250,000. Three in ten (31%) had won contracts with an export sales value of more than £1 million. These results were in line with the previous year.

²³ Values are not adjusted for inflation when comparing to 2021/22.

Chart 4.2.12 Value of all new overseas contracts made in previous 12 months – Posts



Caption: 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=114 (2022/23), n=158 (2021/22))

Description: Clustered bar chart comparing the value of all new overseas contracts made in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Reported additional value of DBT support

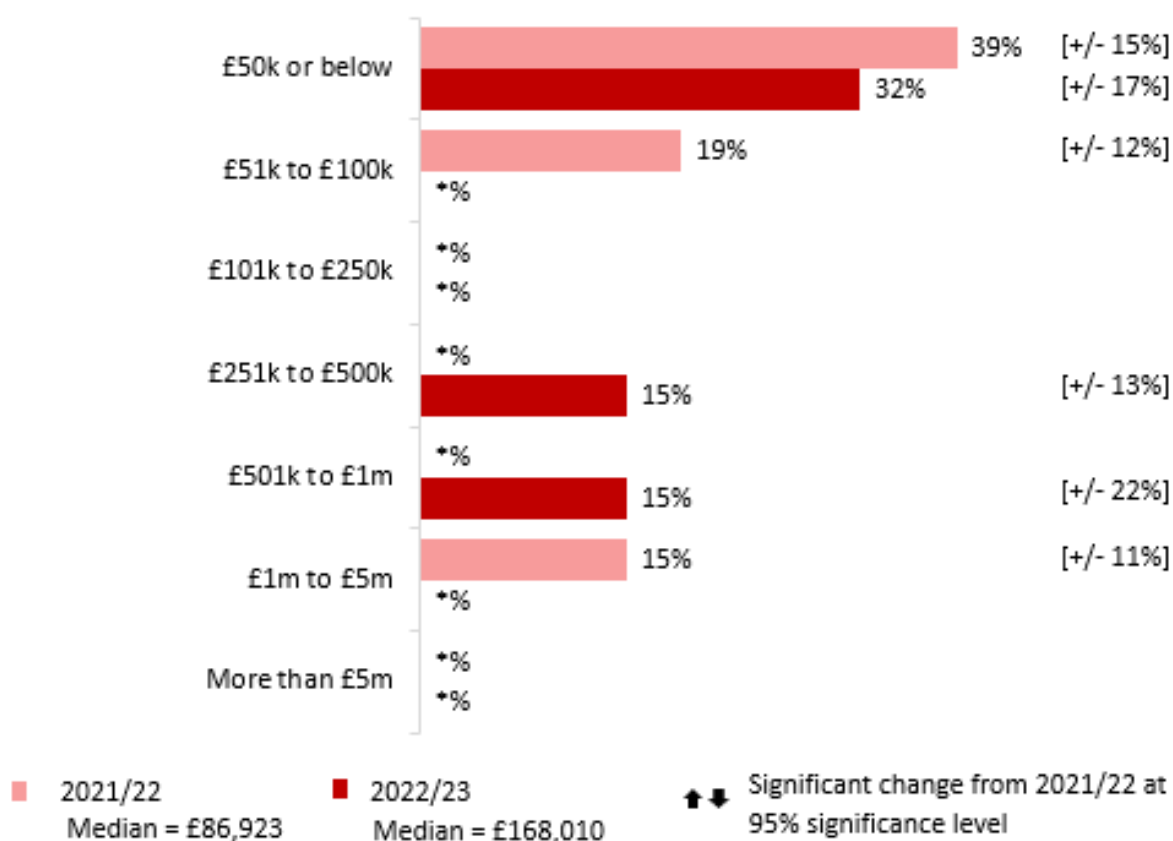
This section considers the value of DBT support to businesses. If businesses were not able to estimate the impact of the Posts service, they were asked to think about the impact from all of their interactions with DBT. The analysis in this section measures the additional contribution that DBT made towards 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 DBT support. This data was used to estimate the 'reported additional export sales' – that is, the reported additional impact of using DBT services on export sales. The reported additional export sales for Posts were £168,010, across all the contracts that Posts helped businesses to win (compared to £86,923 in the RIS 2021/22).

Note that this does not include businesses that did not win any new export contracts, or businesses that said DBT made no impact on overseas contract wins.

A third (32%) reported additional export sales of £50,000 or below, and 7% reported additional new export sales of between £51,000 and £100,000. Some businesses had exceptionally large value added by DBT support, with 15% winning overseas sales contracts with the help of DBT support worth more than £1 million (Chart 4.2.13). These results are in line with the previous year.

Chart 4.2.13 Value of new overseas contracts made in previous 12 months with help from DBT – Posts



Caption: QContractValueDBT: What was the value of these new overseas business contracts that your business won with the help of support from the service or DBT last year?

Base: All businesses that used Posts and won any new overseas business contracts with the help of DBT (n=37 (2022/23), n=55 (2021/22)), *Redacted due to small base sizes.

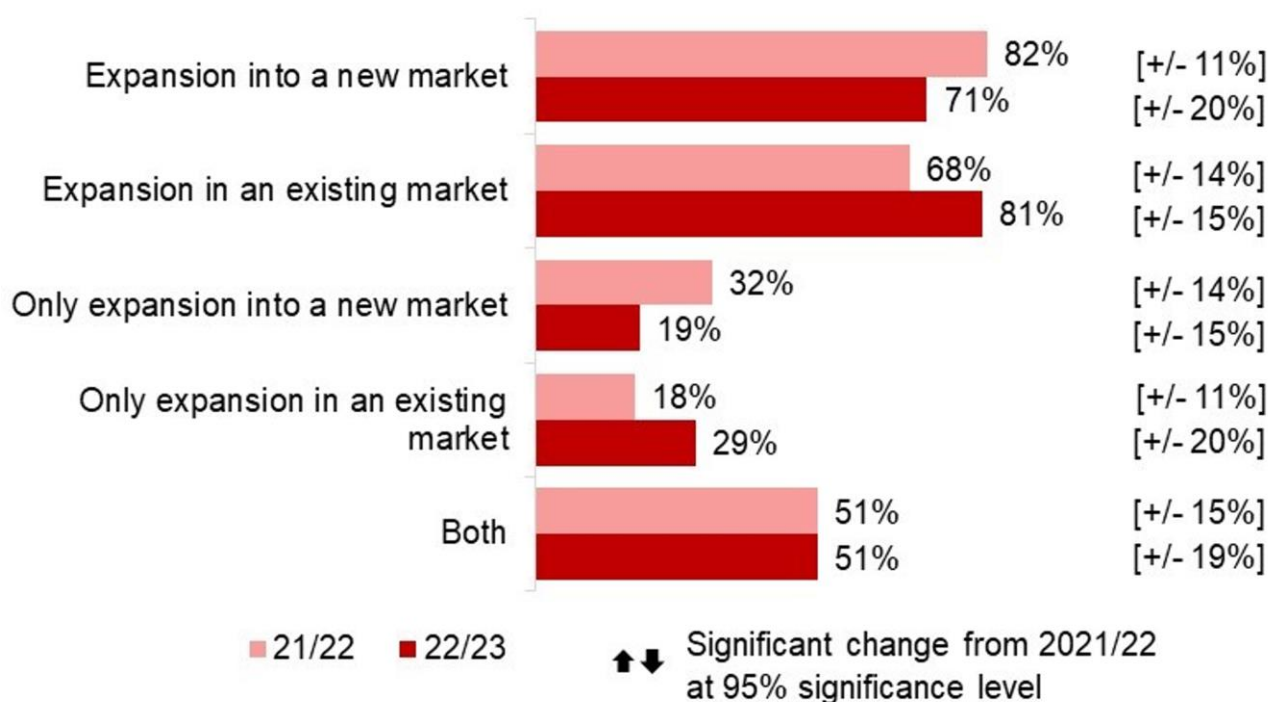
Description: Clustered bar chart comparing the value of all new overseas contracts made with DBT support in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

4.2.7 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 (Chart 4.2.14). This question

was asked to businesses that said DBT 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 (71%) businesses said they were assisted with expansion into a new market and eight in ten (81%) said they were assisted with expansion within an existing market. This includes 19% who said that DBT helped them expand into new markets (but not existing markets), and 29% who expanded within an existing market (but not into new markets). Half (51%) reported that DBT helped them expand into both existing and new markets. These results were in line with the previous year.

Chart 4.2.14 Whether new contracts won with DBT's help represented expansion into new markets or existing markets – Posts



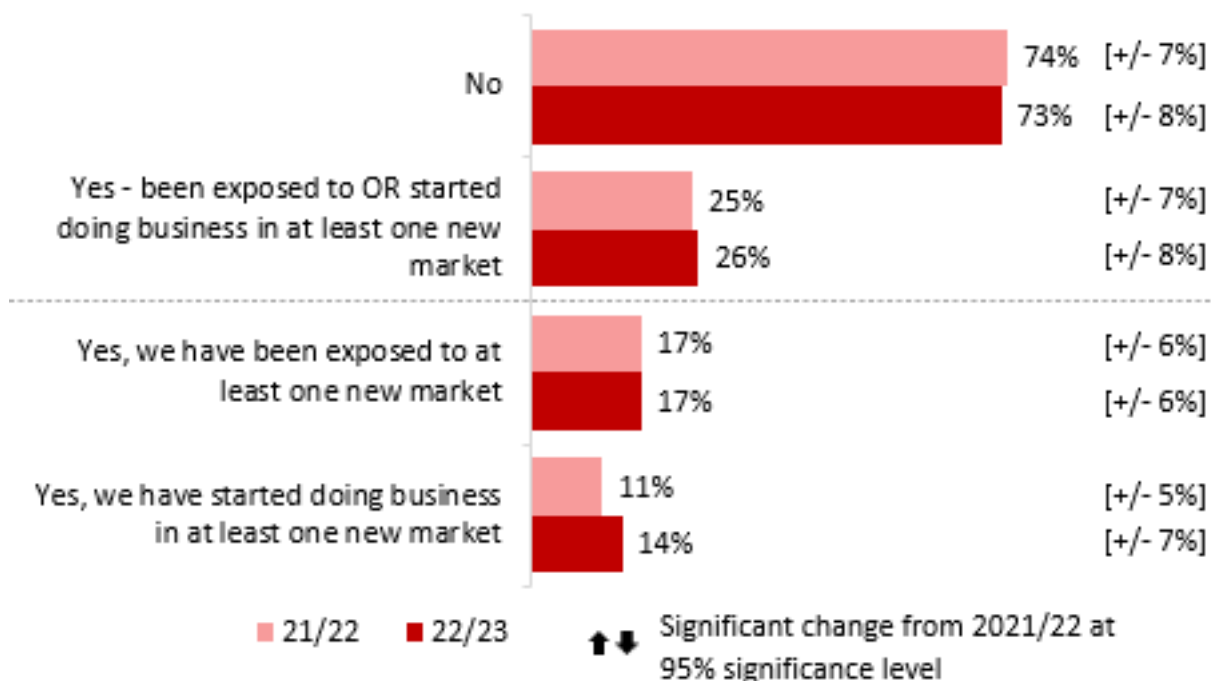
Caption: QContractRepresent: Did these new overseas contracts represent ...?

Base: All businesses that used Posts and won any new overseas business contracts with the help of DBT (n=37 (2022/23), n=55 (2021/22))

Description: Clustered bar chart comparing whether new contracts won with DBT's help represented expansion into new markets or existing markets in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

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 service (Chart 4.2.15). 1 in 6 businesses (17%) said they had been exposed to at least one new market, while 1 in 7 (14%) reported that they had started doing business in at least one new market. These results were in line with the previous year.

Chart 4.2.15 Whether increased exposure or starting business in a new overseas market – Posts



Caption: QGrowthDBT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?

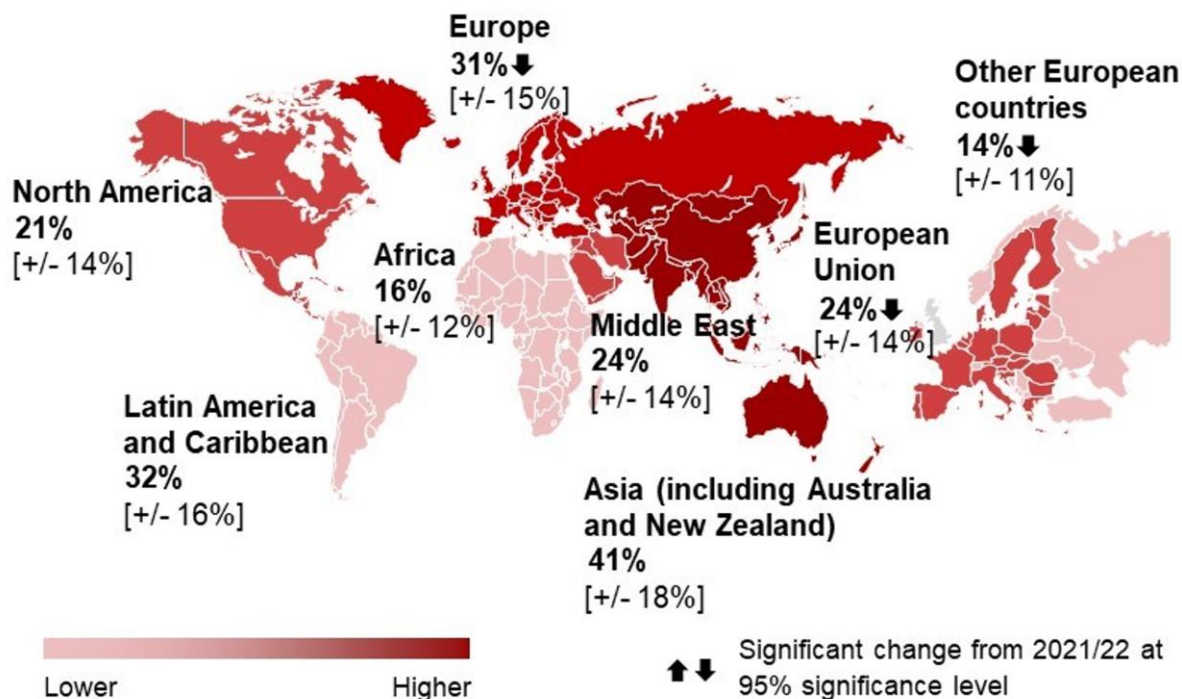
Base: All businesses that used Posts (n=168 (2022/23), n=228 (2021/22))

Description: Clustered bar chart comparing whether increased exposure or starting business in a new overseas market in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Chart 4.2.16 and Table 4.2.2 show that the most common new market for increased exposure or business was Asia (including Australia and New Zealand) (41%), followed by Latin America and the Caribbean (32%) and Europe (31%). Looking in more detail at Europe, 24% reported that their increased exposure or new business was within the European Union, while 14% had new or increased exposure in other European countries.

Compared to the RIS 2021/22, Asia replaced Europe as the most common new market for increased exposure or business. Businesses were less likely to report increased exposure in Europe compared to the RIS 2021/22 (31%, down from 60%), and this applied both to the European Union (24%, down from 48%) and other European countries (14%, down from 35%).

Chart 4.2.16 The new markets that the organisations have started doing business in or been exposed to – Posts



Caption: QNewRegion: Which of the following new markets has your business started doing business in or been exposed to?

Base: All businesses that used Posts and have had increased exposure to, or started doing business in at least one new market (n=42 (2022/23), n=54 (2021/22))

Description: A map of the world. Regions that businesses have done more business in or are more exposed to are shown as darker. The main findings were presented in the text preceding the chart.

Table 4.2.2 The new markets that the organisations have started doing business in or been exposed to – Posts

Region	2021/22	CI (+/-)	2022/23	CI (+/-)	Change
Europe	60%	15%	31%	15%	↓
European Union	48%	15%	24%	14%	↓
Other European countries	35%	14%	14%	11%	↓
Asia (including Australia and New Zealand)	33%	14%	41%	18%	-
North America	28%	14%	21%	14%	-
Latin America and Caribbean	28%	14%	32%	16%	-
Middle East	30%	14%	24%	14%	-
Africa	22%	14%	16%	12%	-
Base	54*		42*		

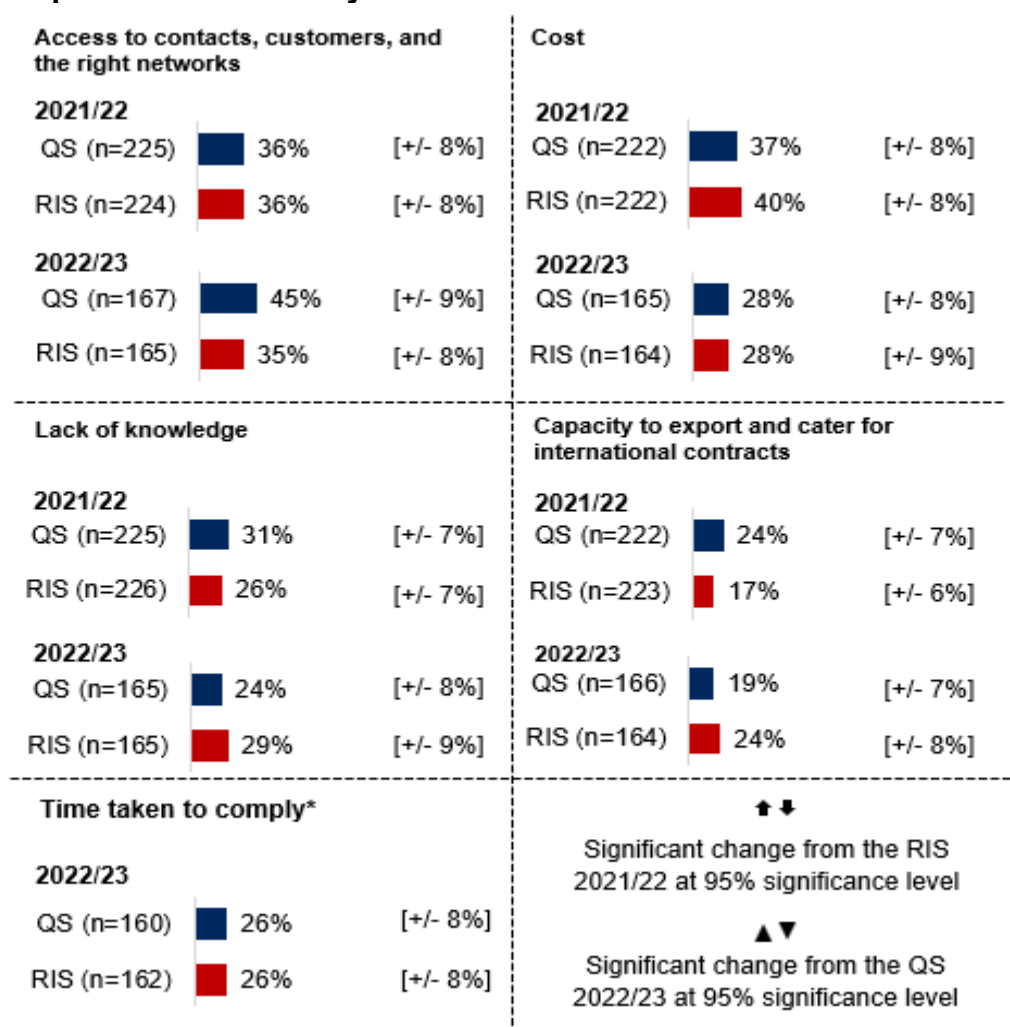
*Small base sizes.

4.2.8 Barriers to exporting

Businesses were asked in both the QS and RIS about 5 **potential barriers for their business in relation to exporting** (Chart 4.2.17); 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).

The top barrier in the RIS 2022/23 was 'access to contacts' (35%) followed by 'lack of knowledge' (29%) and 'cost' (28%). These results were in line with the previous year and with responses in the QS 2022/23.

Chart 4.2.17 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – Posts



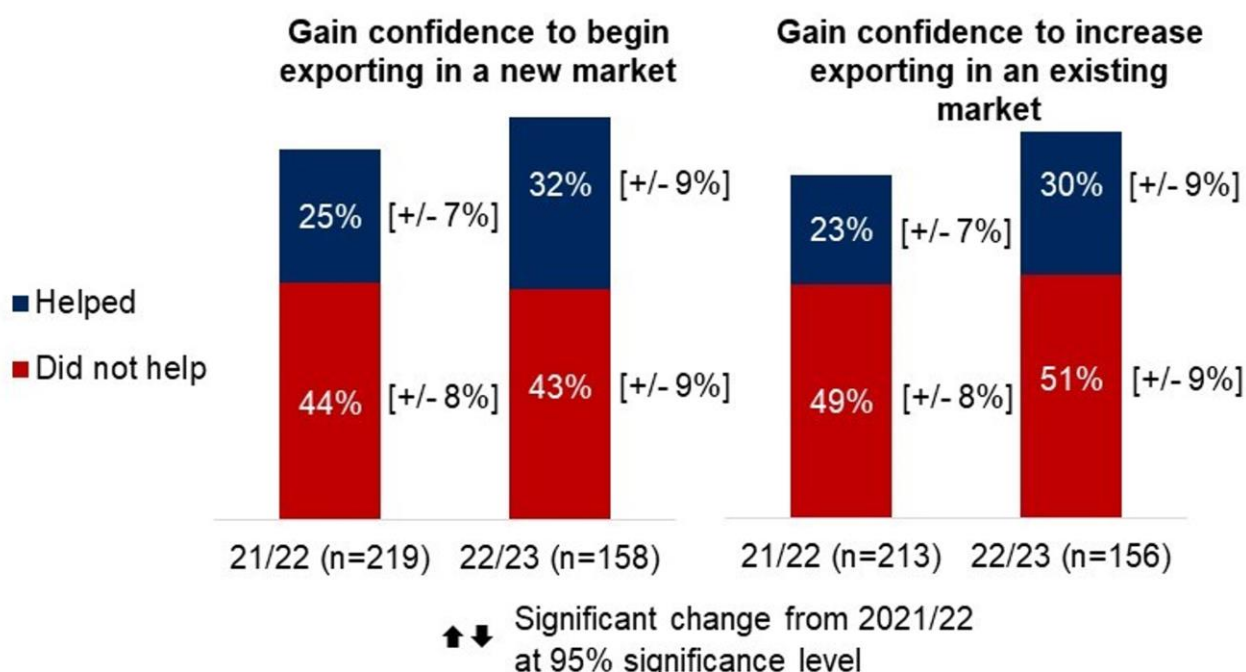
Caption: QBarrier: On a scale of 0 to 10, where 0 means it is not a barrier at all and 10 means it is a very strong barrier, how much of a barrier was the following for your business when it comes to exporting? A barrier is defined as a score between 7 and 10.
Base: All businesses that used the service not including those who gave a 'not applicable' answer. *Code amended or added in 2022/23

Description: A set of horizontal bar charts comparing the proportion of QS and RIS respondents encountered barriers. The barriers include access to contacts, customers and the right networks, cost, lack of knowledge, capacity to export and cater for international contracts and time taken to comply.

4.2.9 Wider benefits of the service

Businesses were asked to think about the extent to which using the Posts service had helped them gain confidence to begin exporting in a new market or increase exporting in an existing market (Chart 4.2.18). A third (32%) of businesses reported that using the Posts service had helped them gain confidence to begin exporting in a new market, while more than 4 in 10 (43%) said the service had not helped them in this way. 3 in 10 (30%) reported that using the Posts service had helped them gain confidence to begin exporting in an existing market, but a larger proportion (51%) said the service did not help them to do this. These results were in line with the previous year.

Chart 4.2.18 To what extent using the Posts service helped to build confidence to export



Caption: 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 the service help you to ...? Helped (7-10), Neutral (4-6), Did not help (0-3).

Base: All businesses that used the service not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

Description: Stacked bar chart comparing confidence in exporting between QS and RIS in 2021/22 and 2022/23. The main findings were presented in the text preceding the chart.

Businesses were asked to think about the extent to which the service had **helped them improve their knowledge**. Chart 4.2.19 below shows how businesses rated the impact of using the Posts service on their knowledge.

On balance, businesses were more likely to say that using the Posts service did not help to improve their knowledge in various ways, rather than say that it did help them.

3 in 10 (30%) said using the Posts service **was helpful for increasing their knowledge of support available to them (from DBT and elsewhere)**, while 35% said that it did not help them in this way.

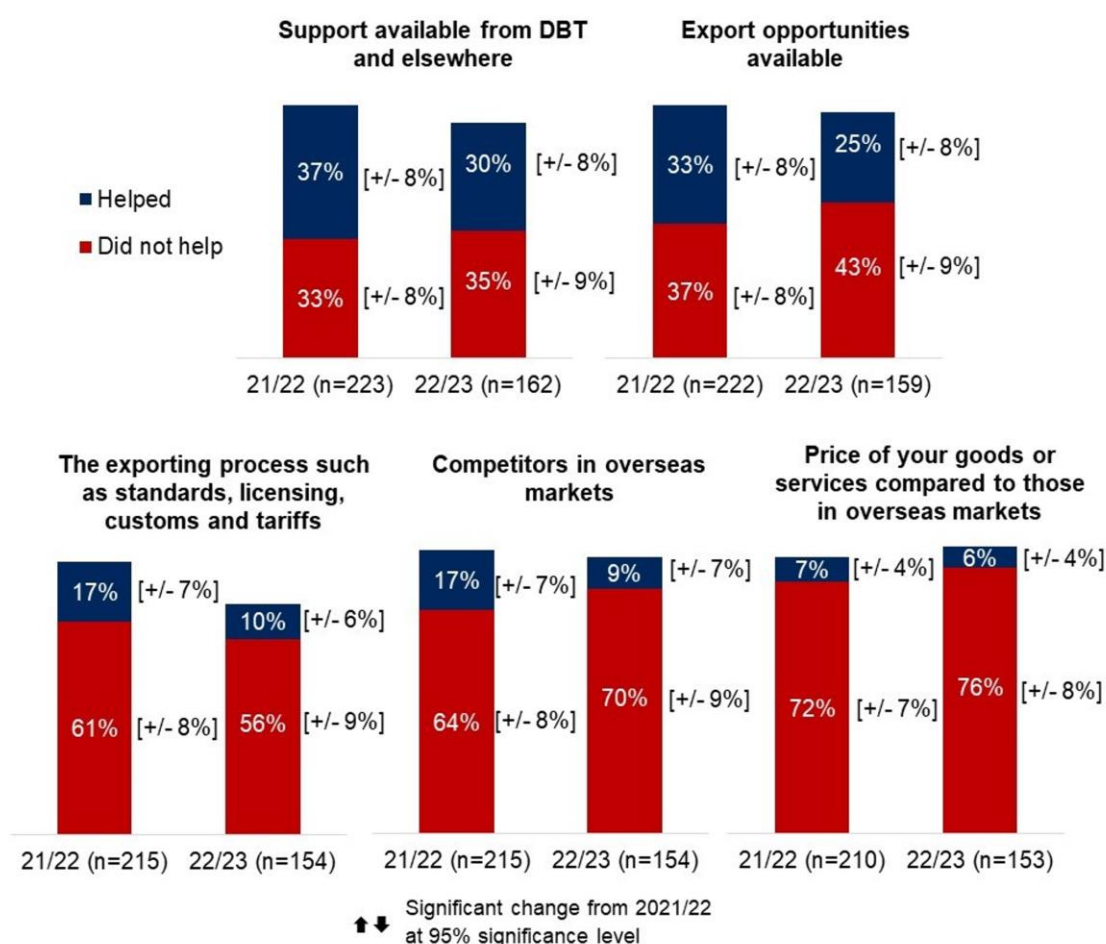
1 in 4 (25%) said the service helped to increase their knowledge of **export opportunities available**, while more than 4 in 10 (43%) said it did not help them do this.

More than half (56%) of businesses said that the service **did not help to improve their knowledge of the exporting process**, such as standards, licensing, customs, and tariffs, while 10% of businesses said the service did help them in this way.

Only small proportions said that using Posts improved their knowledge about their **competitors in overseas markets** (9%) and of **the price of goods** compared with those in overseas markets (6%).

Findings were in line with the RIS 2021/22.

Chart 4.2.19 To what extent the business felt that their knowledge has improved as a result of using the service – Posts



Caption: QImproveKnowledge: Using the same scale, to what extent do you feel that your business improved its knowledge of the following as a result of the service? Helped (7-10), Neutral (4-6), Did not help (0-3).

Base: All businesses that used the service not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not show

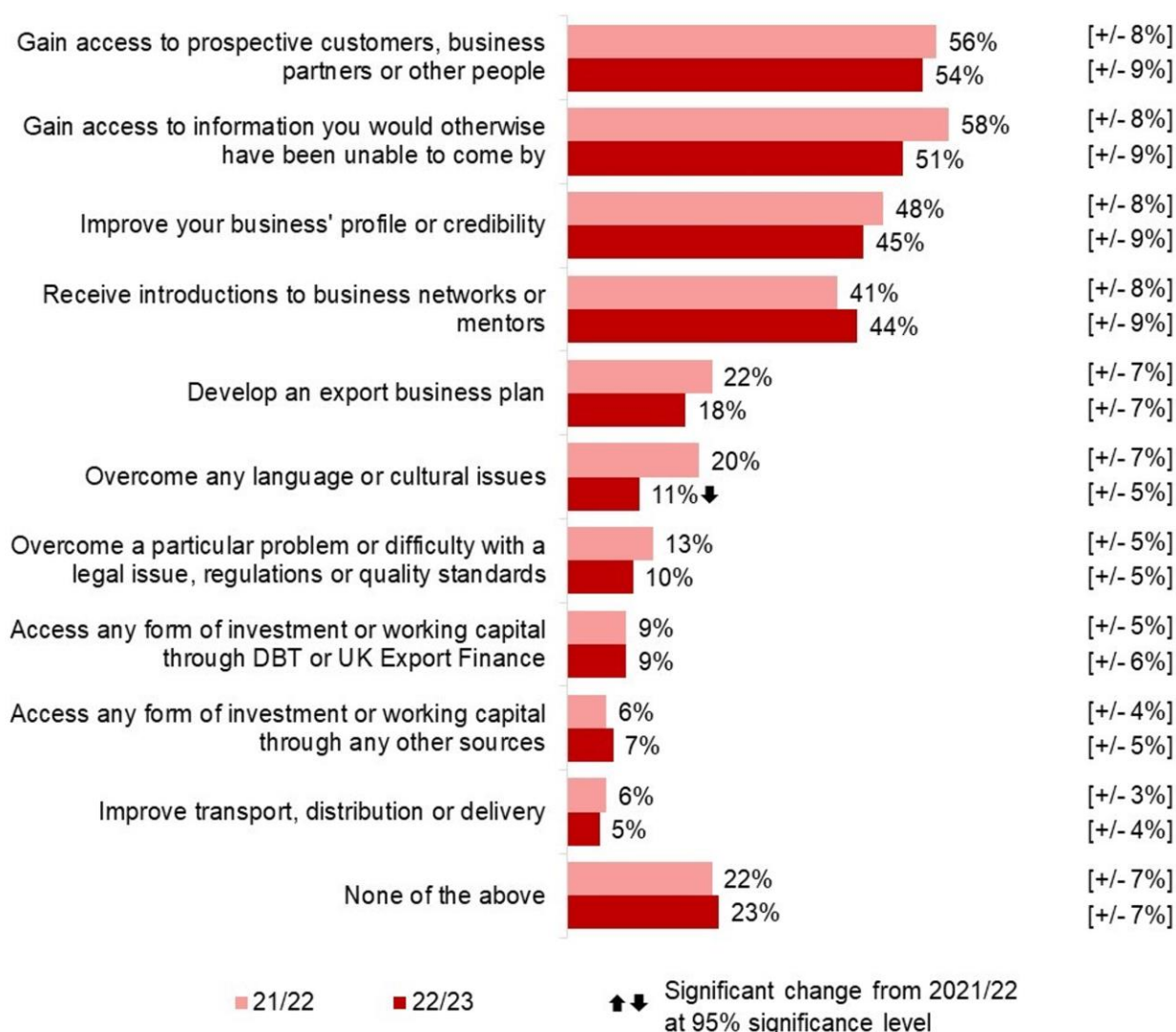
Description: Five stacked bar chart comparing the extent to which businesses felt their knowledge had improved as a result of using the service, between QS and RIS in 2021/22 and 2022/23. The main findings were presented in the text preceding the chart.

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. A detailed breakdown of responses is shown in Chart 4.2.20.

The top responses were: helping businesses to gain access to prospective customers, business partners or other people that they otherwise would have been unable to meet (54%), or to gain information that they would otherwise have been unable to come by (51%). Around a quarter (23%) felt that using the Posts service had not helped them in any of the ways listed.

Compared to the RIS 2021/22, there was a decrease in the proportion of businesses that said they overcame any language or cultural issues, from 20% to 11%. There were no other significant changes compared to the RIS 2021/22.

Chart 4.2.20 In what ways has the business felt it benefited from DBT support – Posts



Caption: QServiceBenefit: in which of the following ways if any, has your business benefited specifically from the service over the last year?

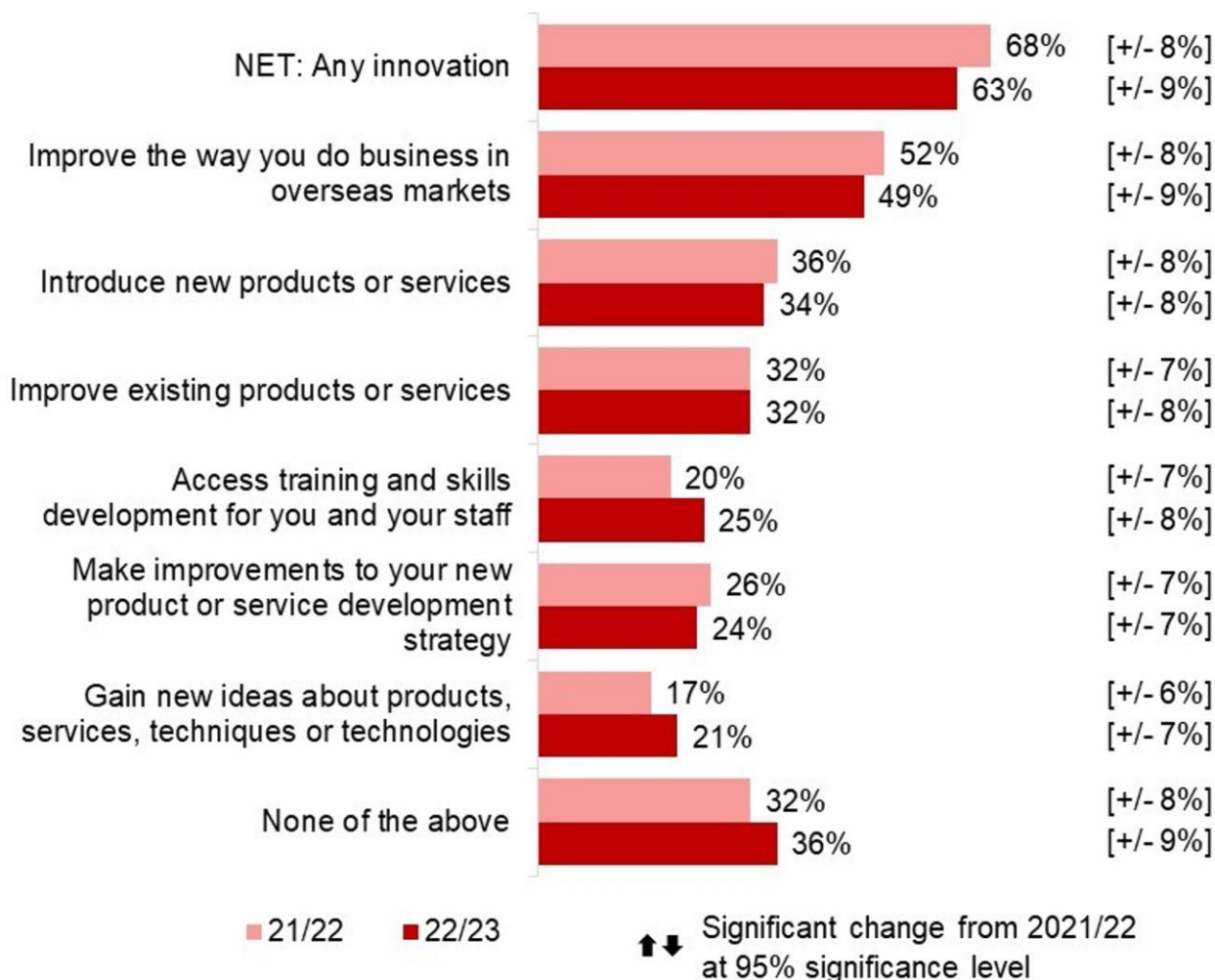
Base: All businesses that used Posts (n=168 (2022/23), n=228 (2021/22))

Description: Clustered bar chart comparing how businesses felt they had benefitted from DBT support in 2022/23 and 2021/22. The main findings were presented in the text preceding the chart.

Businesses were asked whether using the Posts service had helped, or was likely to help, support innovation and/or development in their business (Chart 4.2.21). More than 3 in 5 (63%) 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 (49%), to introduce new products or services (34%) and to improve existing products or services (32%).

Results are in line with the previous year.

Chart 4.2.21 Whether the service has / is likely to help innovation and development – Posts



Caption: QInnovationSupport: 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=168 (2022/23), n=228 (2021/22))

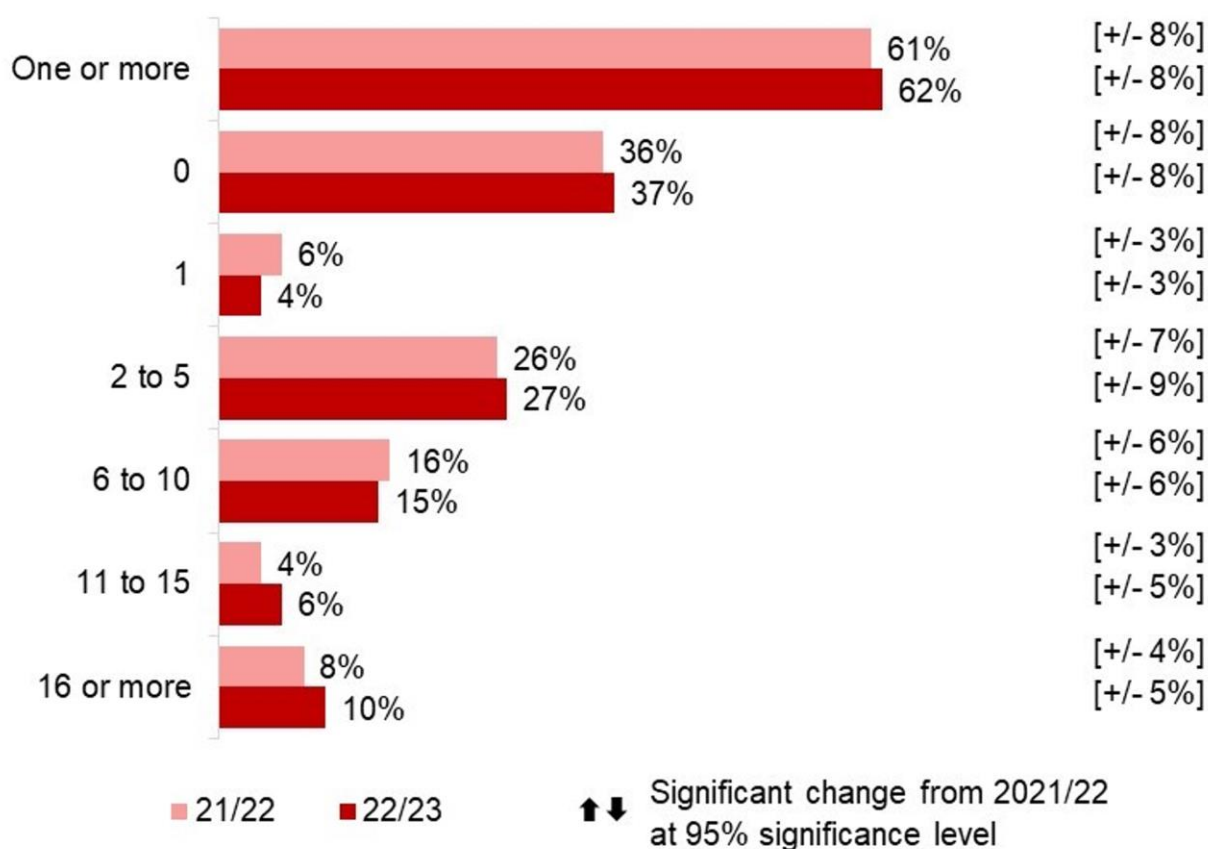
Description: Clustered bar chart comparing whether businesses thought the service has or is likely to help innovation and development in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

International contacts

Businesses were asked how many overseas contacts they had made as a result of using Posts over the past year (Chart 4.2.22). Around 6 in 10 (62%) businesses made at least one new overseas contact in the year since using the Posts service. A quarter (27%) made between 2 and 5 new contacts and 16% made more than 10. More than a third (37%) 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 RIS 2021/22.

The median number of contacts made was 2, compared to 1 in the RIS 2021/22.

Chart 4.2.22 Number of new overseas contacts made in previous 12 months – Posts



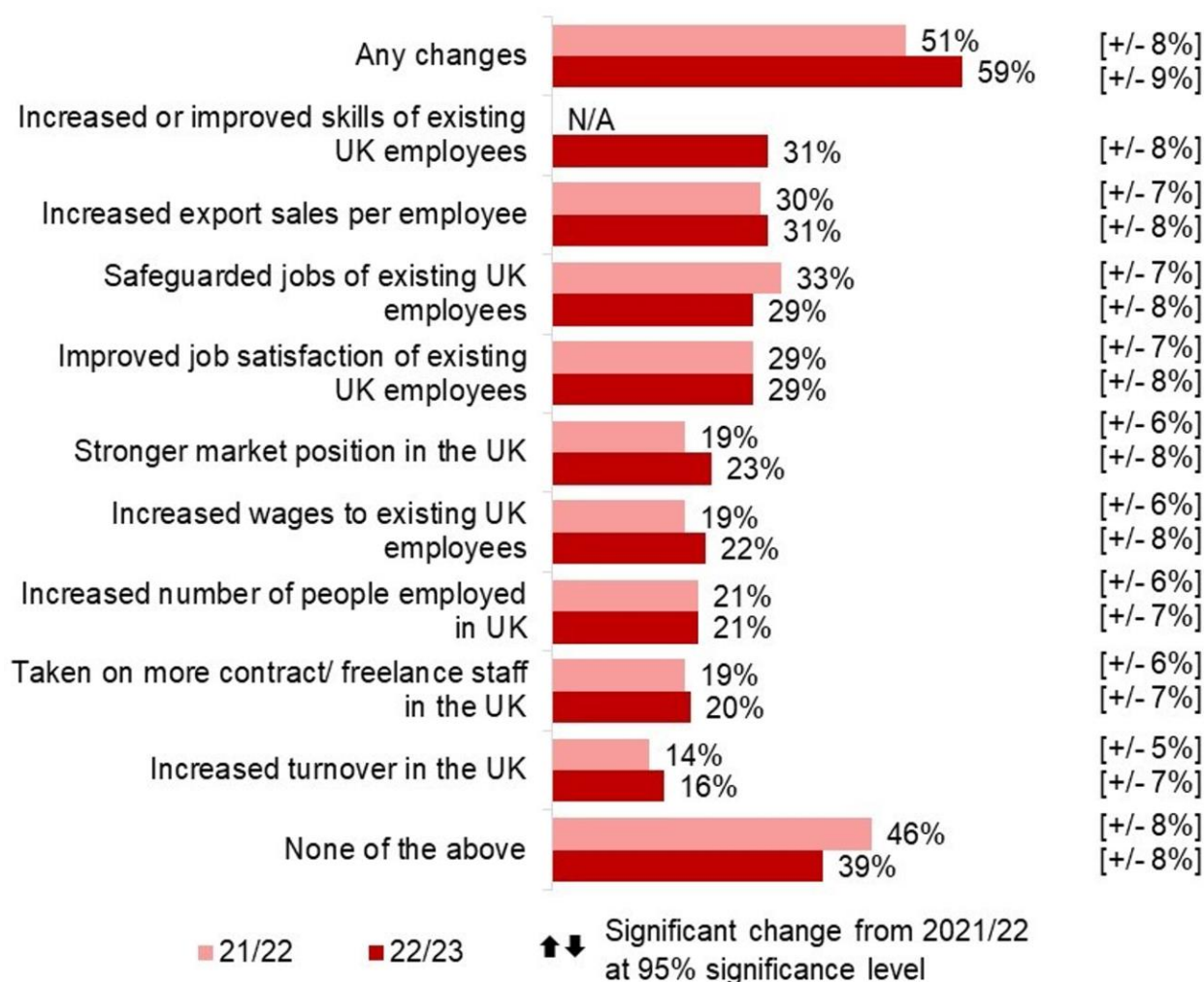
Caption: QContactsMade: How many new overseas contracts, if any, did your business make as a result of the service in the past year?

Base: All businesses that used Posts (n=168 (2022/23), n=228 (2021/22))

Description: Clustered bar chart comparing the number of new overseas contacts made in the previous 12 months in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Posts service (Chart 4.2.23). 3 in 10 businesses (31%) said they thought using the Posts service had, or would, increase or improve the skills of existing UK employees, and the same proportion (31%) said they had seen, or would see, increased export sales per employee. 3 in 10 also mentioned safeguarding jobs in the UK (29%) and improved job satisfaction of existing UK employees (29%). These findings were in line with the previous year.

Chart 4.2.23 Changes expected / seen in the UK business as a result of receiving the service – Posts



Caption: QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service?

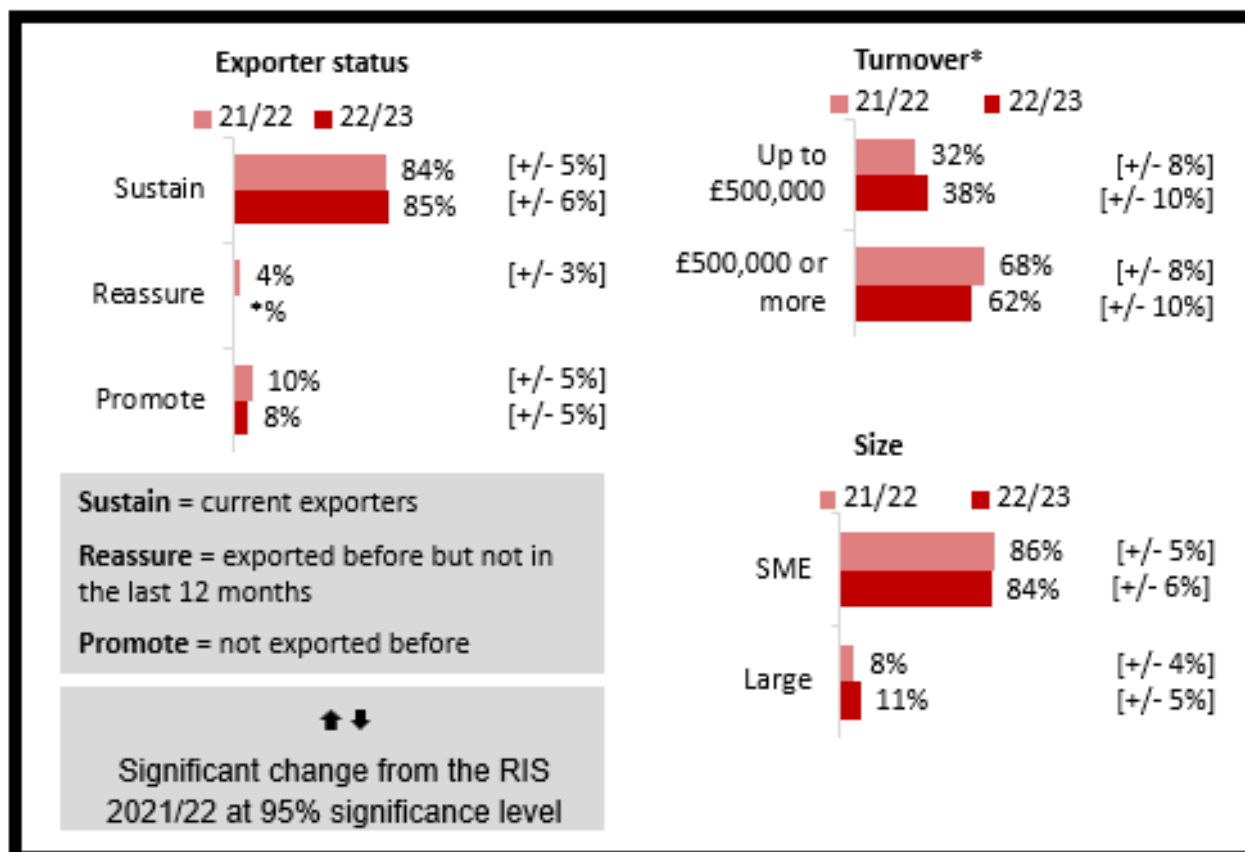
Base: All businesses that used Posts (n=168 (2022/23), n=228 (2021/22))

Description: Clustered bar chart comparing changes expected or seen in the business as a result of using the service in 2021/22 and 2020/2021. The main findings were presented in the text preceding the chart.

4.2.10 Profile of respondents

As shown in Chart 4.2.24, among 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 9 in 10 (85%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months. The size and turnover profile of the businesses supported by Posts in the survey remained in line with the previous year.

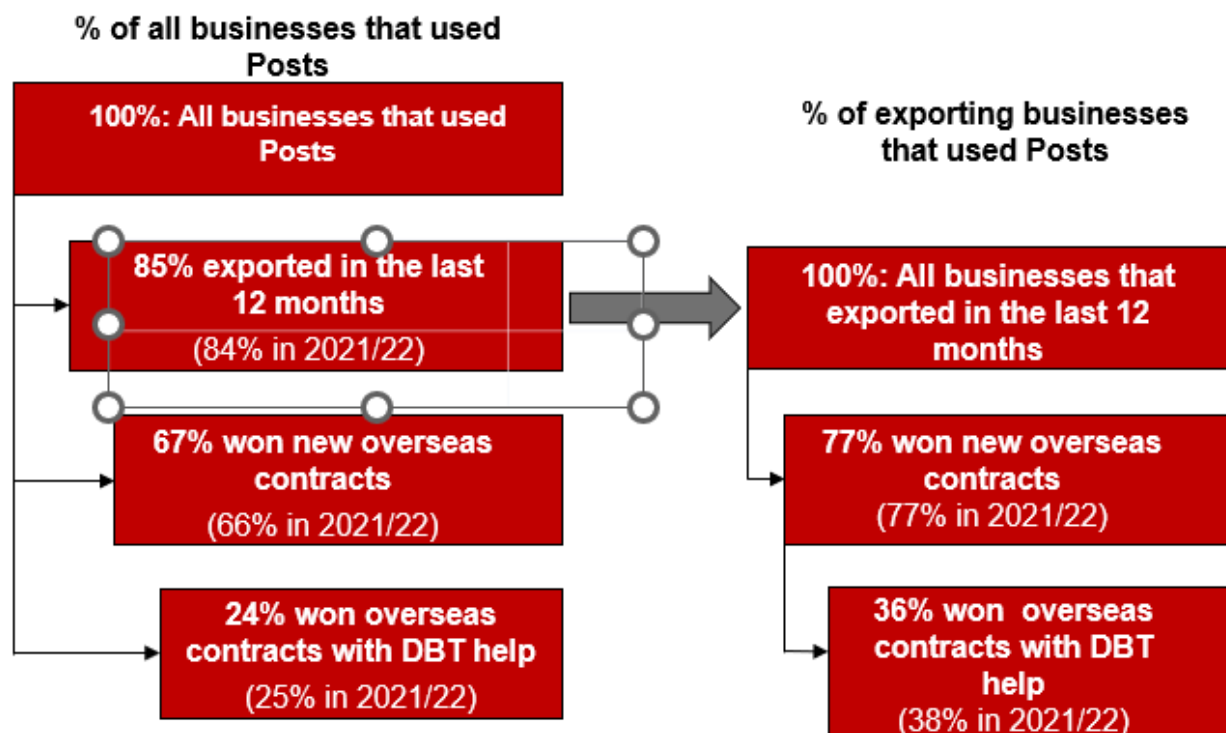
Chart 4.2.24 Profile of RIS Respondents – Posts



Caption: Base: All businesses that used Posts (n=168 (2022/23), n=228 (2021/22)); *All businesses that used Posts not including 'Don't know' and 'Refused' responses (n=116 (2022/23), n=183 (2021/22)). * Redacted due to small base size

Description: Three clustered bar charts comparing exporter status, turnover and size in 2022/23 and 2021/22. The main findings were presented in the text preceding the chart.

Chart 4.2.25 Summary of businesses supported by Posts



Median value of export sales won per business with DBT support:

£168,010 (£86,923 in 2021/22)

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

Caption: Base: All businesses that used Posts (n=168 (2022/23), n=228 (2021/22)); All businesses that used Posts and that exported in the last 12 months (n=148 (2022/23), n=198 (2021/22)); All businesses that used Posts and that won at least one overseas business contract in the last 12 months (n=114 (2021/22), n=158 (2021/22)); All businesses that used Posts and that won at least one overseas business contract with the help of DBT (n=37 (2021/22), n=55 (2021/22))

Description: Flow chart showing how the proportion of overseas contracts won with DBT help is calculated. These findings are described in detail earlier in this chapter.

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

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

This chapter explores the impact of using the ESS-IM service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 120 businesses that used ESS-IM between April 2022 and March 2023 and participated in both the Quality Survey (QS) and RIS. The findings do not include comparisons with the 2021/22 RIS, because of the small number of respondents included in that survey.

4.3.1 Summary of reported impact as a result of ESS-IM support (from RIS)

Actions taken as a result of using ESS-IM

Following their use of the ESS-IM service, 7 in 10 businesses had identified new export opportunities or made new contacts (70%), while over half had researched the paperwork and regulations needed to export (56%). Among non-exporters, almost two thirds of businesses (62%) had assessed their readiness to export after using ESS-IM.

Impact on exporting

The proportion of businesses classified as ‘Sustain’ (i.e. currently exporting) in the RIS was 90%, similar to the QS 2022/23 (92%).

Impact on winning contracts

Of the businesses that exported, 9 in 10 (90%) reported winning new overseas business contracts or gaining extensions to existing overseas contracts in the past year since using the ESS-IM service.

Overall, 4 in 5 (80%) businesses won a new overseas contract. This included 3 in 10 (30%) who said this was with assistance from ESS-IM or DBT.

Impact on exposure and growth

Around 8 in 10 (78%) businesses who won any new overseas business contracts with the help of DBT said ESS-IM assisted with expansion into a new market, and around half (53%) said ESS-IM assisted with expansion within an existing market.

Among all businesses, 3 in 10 businesses (30%) reported being exposed to or starting to do business in at least one new market. The most common new markets for increased exposure or business were Europe (38%) and Asia (37%).

Impact on contacts and networks

Around 6 in 10 businesses (60%) made at least one new overseas contact after using ESS-IM. The median number of contacts made was two.

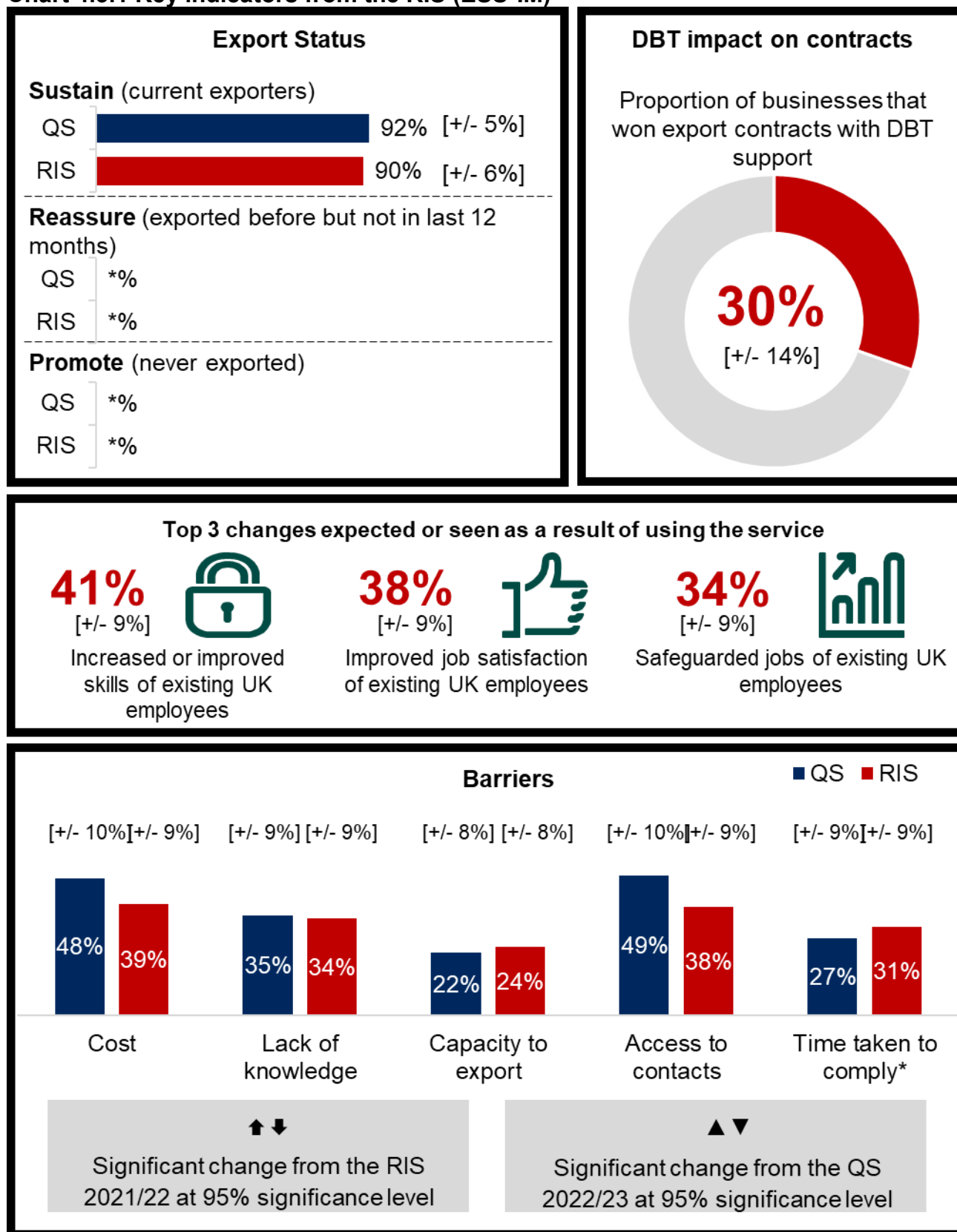
Impact on confidence

A third (33%) of businesses reported that using the ESS-IM service had given them confidence to begin exporting in a new market, while 26% said this for increasing exports in an existing market.

Other impact

6 in 10 businesses (60%) reported that the ESS-IM service helped them gain information that they would otherwise have been unable to come by, while half (50%) said it helped them gain access to prospective customers, business partners or other people that they otherwise would have been unable to meet.

Chart 4.3.1 Key indicators from the RIS (ESS-IM)



Caption: Base: All businesses that used Export Support Service- International Markets (ESS - IM) and completed both surveys (n=120); Barriers - Access to contacts (QS n=119, RIS n=119), Cost (QS n=118, RIS n=119), Lack of knowledge (QS n=119, RIS n=118),

Capacity to export (QS n=120, RIS n=117), Time to comply (QS n=119, RIS n=118 * Code amended or added in 2022/23. * Redacted due to small base size

Description: A collection of charts showing headline findings for businesses using the service. This includes findings for export status, DBT impact on contracts, changes expected or seen as a result of using the service and barriers. These findings are described in more detail throughout this chapter.

4.3.2 Satisfaction with ESS-IM (from Quality Survey)

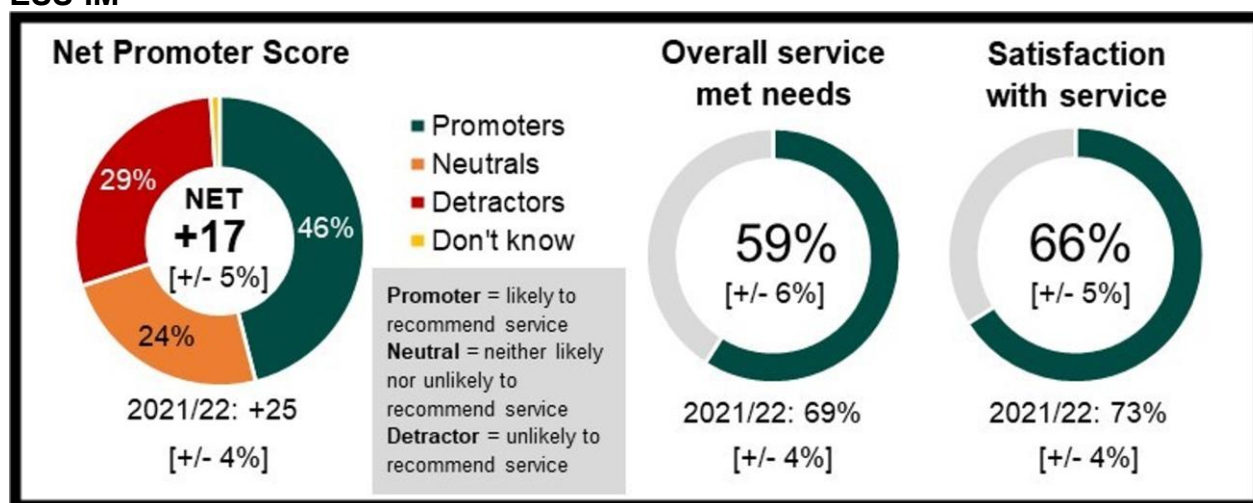
In the QS 2022/23, nearly half of businesses (46%) that used ESS-IM said they would recommend the service, while 3 in 10 (29%) said they would not. This gave ESS-IM a Net Promoter Score (NPS) of +17. Two thirds (66%) reported they were satisfied with the ESS-IM service, and 6 in 10 (59%) said the overall service met their needs. These results were broadly in line with the previous year.

ESS-IM users were particularly positive about the organisation of the service (83%), followed by the straightforwardness of the registration process (76%) and staff knowledge (74%). Compared to the previous year, businesses were less positive about levels of staff knowledge (74%, down from 88% in 2021/22) and the amount of time taken to receive information (68%, down from 86% in 2021/22).

As a result of using ESS-IM, around 3 in 5 businesses (58%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all ESS-IM users, over half said they had identified new export opportunities or made new contacts (53%). 2 in 5 (42%) said they had researched the paperwork and regulations needed to export, and a third had looked for other export support services (32%). Compared to the previous year, fewer businesses set up digital, e-commerce, or online sales capability (10%, down from 19% in 2021/22).

ESS-IM respondents were most likely to report that 'access to networks' (43%) was a barrier to exporting, followed by 'cost' (40%). Findings were broadly in line with the previous year.

Chart 4.3.2 Net Promoter Score and Satisfaction with service (from Quality Survey) – ESS-IM



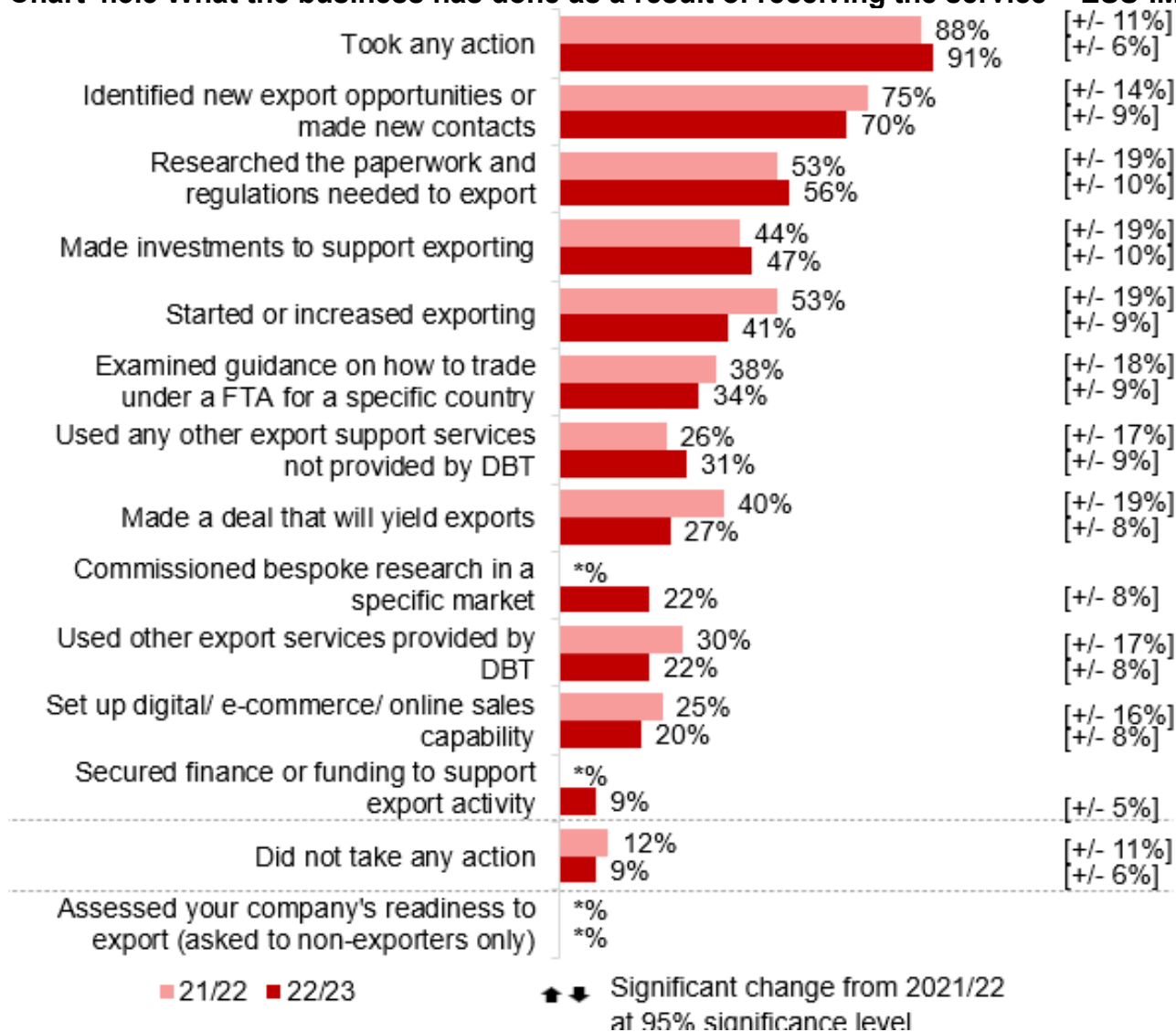
Caption: Base: All businesses who used the service (n=94** (2021/22), n=319 (2022/23)); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=89** (2021/22), n=309 (2022/23)); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=93** (2021/22), n=312 (2022/23))

Description: A collection of three circle charts, showing the NPS score – broken down into Promoters, Neutrals and Detractors – followed by the percentage that thought the overall service met needs, and the percentage satisfaction with service.

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 ESS-IM service (Chart 4.3.3). Around 9 in 10 businesses (91%) reported taking any action. 7 in 10 businesses had identified new export opportunities or made new contacts (70%), while over half had researched the paperwork and regulations needed to export (56%). Around 6 in 10 businesses (62%) that were not exporting had assessed their business' readiness to export.

Chart 4.3.3 What the business has done as a result of receiving the service – ESS-IM



Caption: QResultService: What has your business done as a result of the service?
Base: All businesses that used Export Support Service- International Markets (ESS - IM)

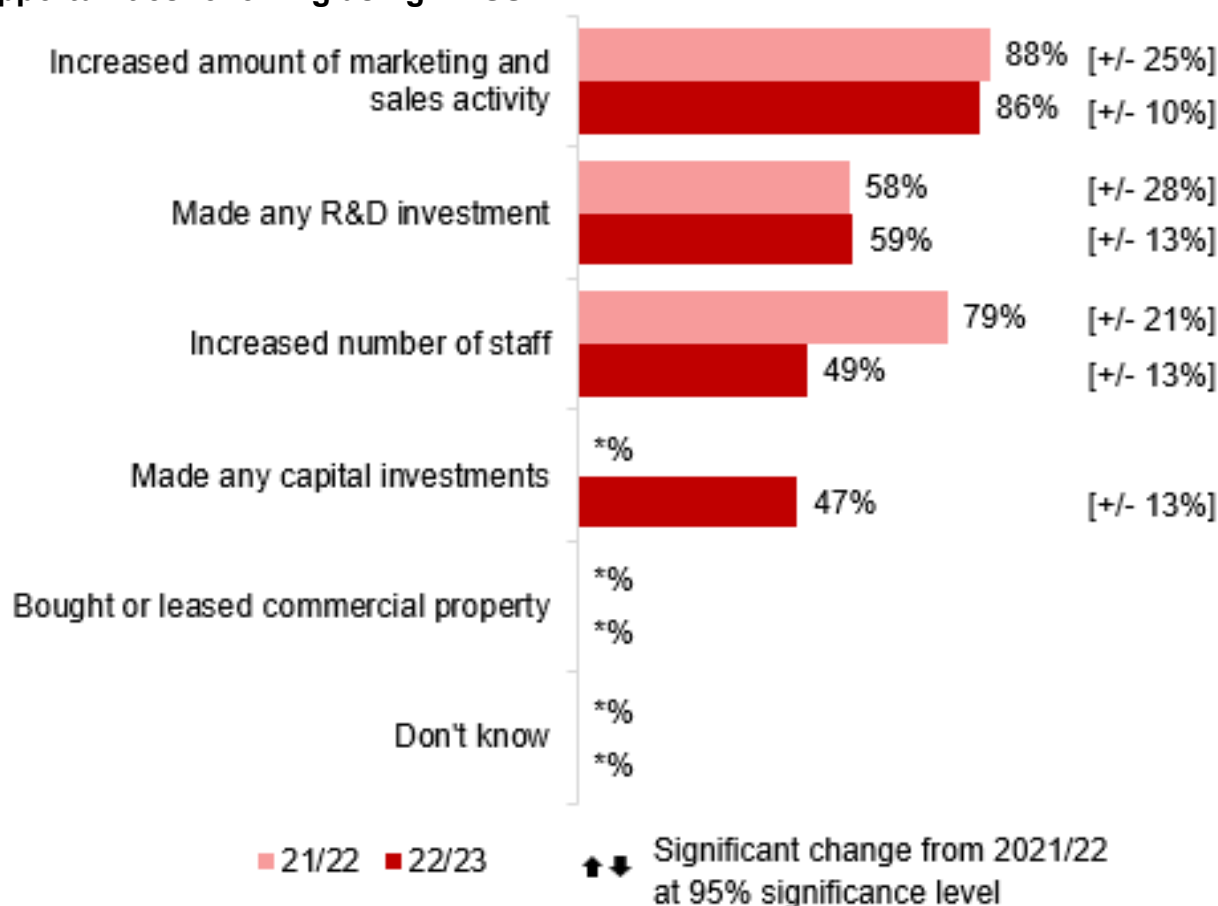
Export Support Service – International Markets (ESS-IM)

(n=120 (2022/23), n=36 (2021/22)); All businesses that used Export Support Service- International Markets (ESS - IM) and were non-exporters (n=13 (2022/23), n=4 (2021/22)).
 * Redacted due to small base size

Description: Clustered bar chart comparing what businesses have done as a result of using the service in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Businesses that had made an investment as a result of using the ESS-IM service were asked what investments they had made (Chart 4.3.4; 59 respondents). The most common answer was an increase in marketing and sales activity (86%), followed by R&D investment (59%), an increase in staff numbers (49%) or making capital investments (47%).

Chart 4.3.4 Type of investments made to support new or increased export opportunities following using – ESS-IM



Caption: QInvestmentMade: Which of the following investments has your business made to support new or increased export opportunities?

Base: All businesses that used Export Support Service- International Markets (ESS - IM) and made investments to support exporting as a result of using Export Support Service- International Markets (ESS - IM) (n=59 (2022/23), n=14 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing what type of investments businesses have made to support new or increased export opportunities following using ESS-IM in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Businesses were asked what organisations they had been in contact with since using ESS-IM (Chart 4.3.5). A third had been in contact with the Chambers of Commerce in the UK (34%), a quarter with HMRC (26%) and a fifth with Innovate UK (19%). 2 in 5 (39%) businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Chart 4.3.5 What organisations respondents have been in contact with since receiving the service – ESS-IM



Caption: QAnyContact: Since your business used the service 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 Support Service- International Markets (ESS - IM) (n=120 (2022/23), n=36 (2021/22)). Coded responses with 5% or more in 2021/22 or 2022/23 are included. * Redacted due to small base size

Description: Clustered bar chart comparing what organisations respondents have been in contact since receiving the service in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

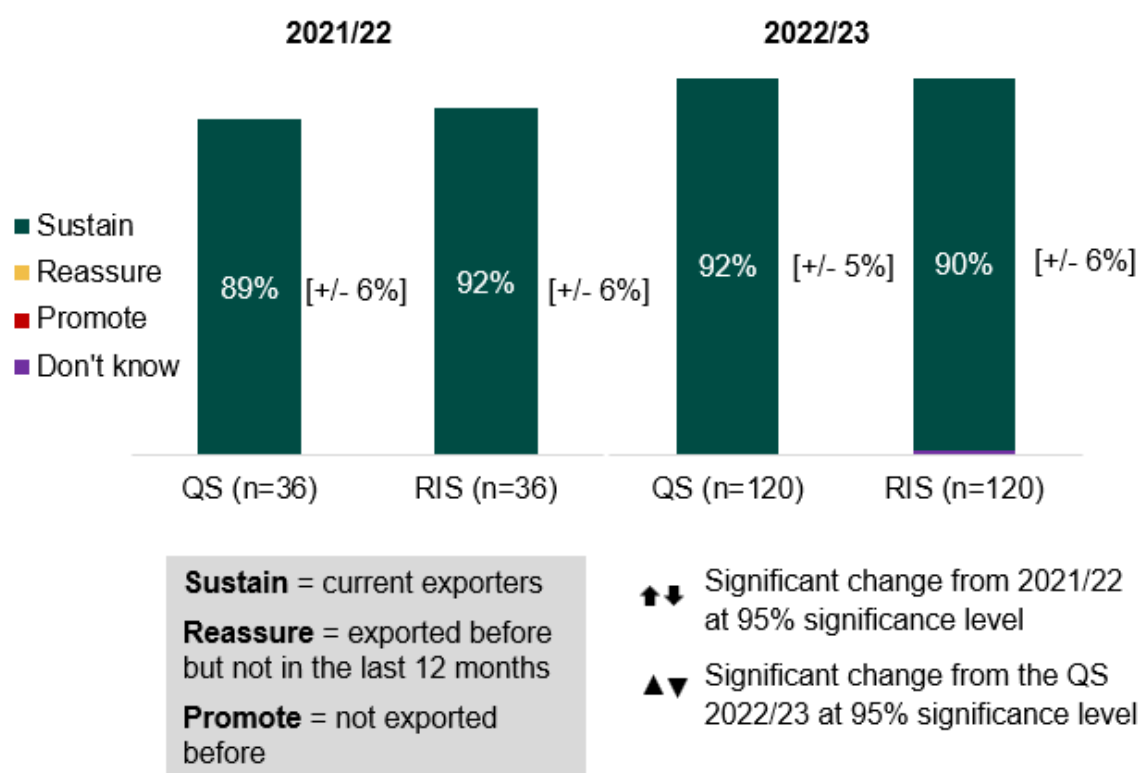
4.3.4 Reported impact on exporting

Businesses that used ESS-IM were asked about their export status, both at the time they accessed the ESS-IM service in the Quality Survey, and their export status 12 months later in the RIS. Responses from the 2 surveys were analysed to see whether the export status of these businesses has changed over this period. DBT 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 9 in 10 businesses (92%) that used ESS-IM fell into this segment at the time of the service delivery (QS 2022/23). This was similar (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. Among ESS-IM users, no businesses fell into this segment at the time of the service delivery (QS 2022/23), while the proportion was 4% in the RIS 12 months later (3%).
- **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. Just 5% that used Posts were in this segment at the time of the service delivery (QS 2022/23) and this remained the same (5%) in the RIS 12 months later.

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



Caption: Source: Composite measure merging data from several variables. Base: All businesses that used Export Support Service- International Markets (ESS - IM) and completed both surveys (Quality Survey: n=120 (2022/23), n=36 (2021/22); RIS: n=120 (2022/23), n=36 (2021/22))

Description: Stacked bar charts comparing the export status of respondents at the time of service delivery in 2022/23 to 2021/22, split between sustain, reassure, promote and don't Export Support Service – International Markets (ESS-IM)

know, though only sustain has been selected. The main findings were presented in the text preceding the chart.

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).

Around half of businesses (45%) from the Promote segment moved to Sustain, and 3% of businesses in the Sustain segment moved to Reassure.

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

Quality Survey Export status	RIS Export status	Percentage	Change since 2021/22
Sustain (n=110)	Sustain	94% [+/- 6%]	-
	Reassure	*% [+/- 4%]	-
	Promote	*% [+/- 4%]	-

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. * Redacted due to small base size

4.3.5 Reported exported contracts achieved since receiving the service

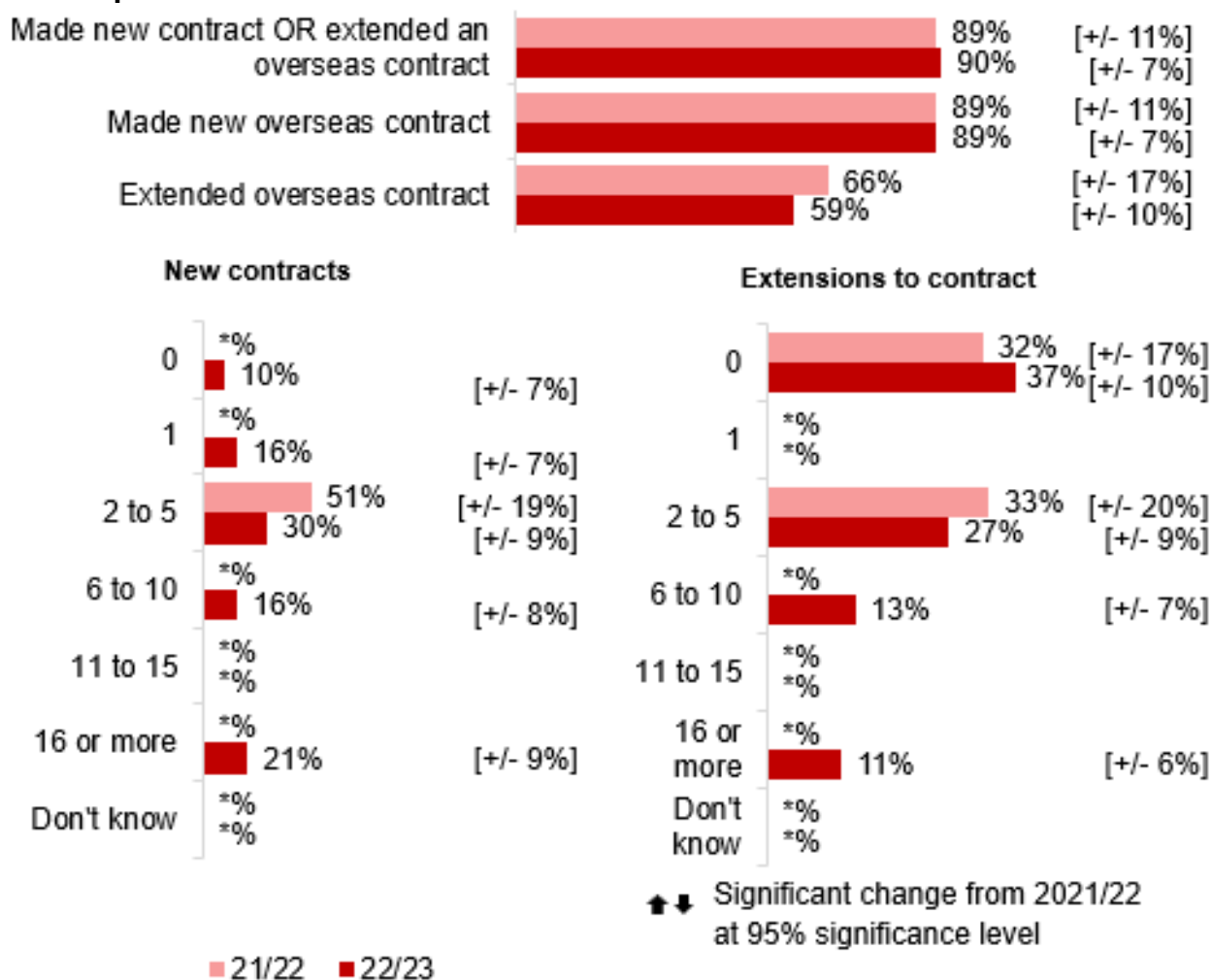
Businesses that had exported in the previous 12 months were asked if they had won any new export contracts, or extended any existing contracts, in the 12 months since using the ESS-IM service (Chart 4.3.8). Businesses were asked to think about all contracts, not just those assisted by ESS-IM or DBT.

Of the 109 businesses that were exporting or had exported in the previous 12 months, 90% 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.

9 in 10 (89%) of these businesses that were exporting or had exported in the previous 12 months had won new overseas business contracts in the year since they used the service. Specifically, 16% had won one overseas contract, and 3 in 10 (30%) had won between two and five overseas contracts. 1 in 5 (21%) businesses had won 16 or more overseas contracts. The median number of contracts won among exporting businesses that had used ESS-IM was three.

Around 6 in 10 (59%) exporting businesses that used ESS-IM reported that they had gained extensions to existing overseas business contracts in the year since they used the service, with 6% extending one contract, and a quarter (27%) extending between two and five contracts. Around one in ten (11%) extended 16 or more existing overseas sales contracts. Around a third (37%) of businesses had not extended any existing contracts. The median number of contracts extended (including those that did not extend any) was 2.

Chart 4.3.8 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 – ESS-IM



Caption: QNewcontract: How many new overseas business contracts for export sales did you win in the past year?

QExtendcontract: How many extensions to existing overseas business contracts for export sales did you win in the past year?

Base: All businesses that used Export Support Service- International Markets (ESS - IM) and were currently selling, or had previously sold goods or services overseas in the previous 12 months (n=109 (2022/23), n=34 (2021/22)); All businesses that used Export Support Service- International Markets (ESS - IM) and were currently selling, or had previously sold goods or services overseas in the previous 12 months, and that answered how many new business contracts were won in the past year (n=109 (2022/23), n=34 (2021/22)). * Redacted due to small base size

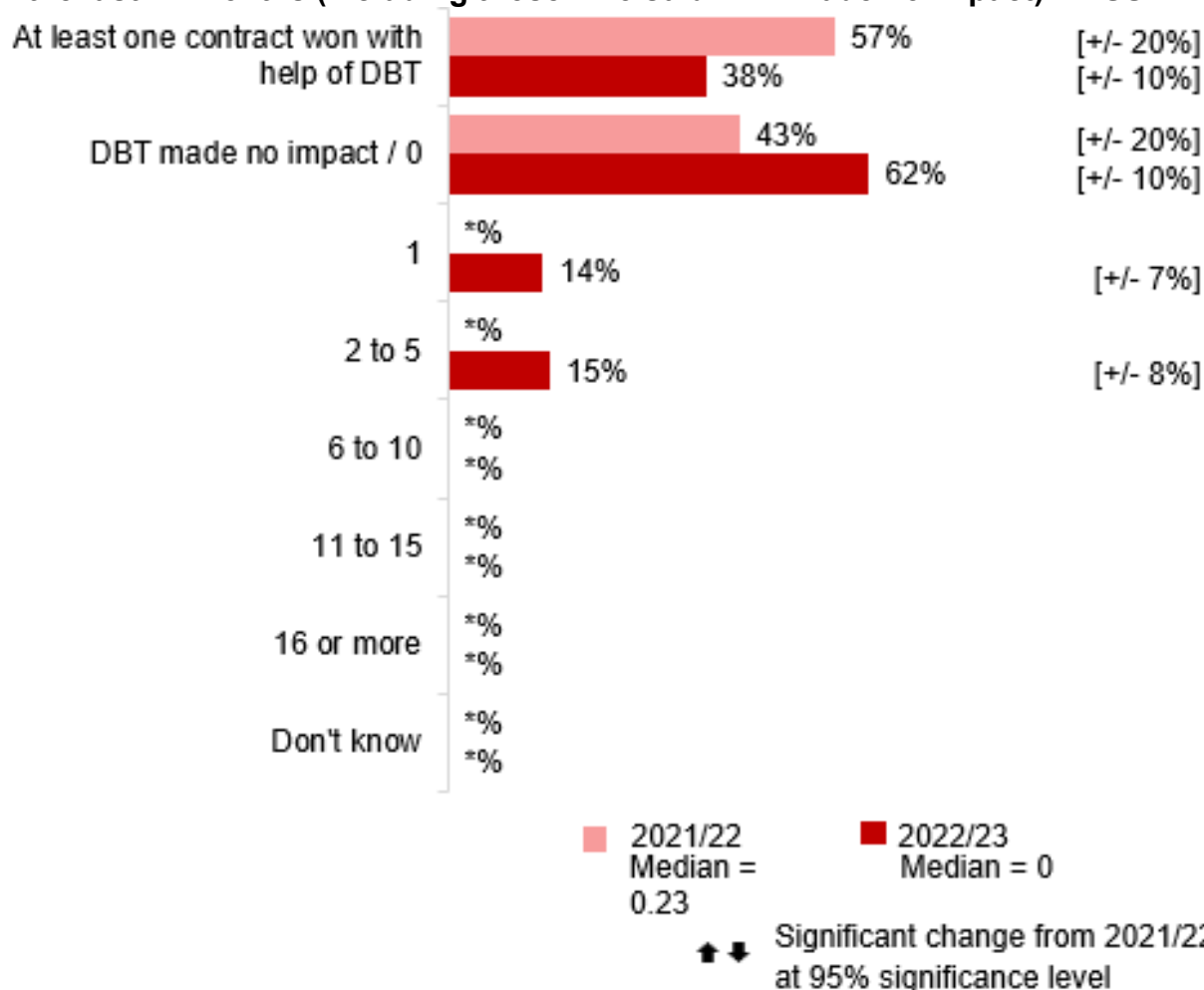
Description: A set of clustered bar charts comparing data between 2021/22 and 2022/23. One compares the proportion that made or extended overseas contracts, the second compares the proportion of numbers of new contracts, and the last compares the proportion of numbers of extensions to contracts. The main findings were presented in the text preceding the chart.

Reported additional contracts which were gained because of DBT support

Businesses that exported and had won at least one new contract in the 12 months since the delivery of the ESS-IM service were asked whether they could estimate the number of contracts won with the assistance of ESS-IM or DBT. In total, 97 businesses (that is 81% of the businesses that were interviewed overall) felt able to provide an estimate and were surveyed about their experiences.

As shown in Chart 4.3.9 below, around 3 in 5 of these businesses (62%) said they won no new overseas sales contracts with the help of DBT or using DBT services made no impact. One in seven (14%) had won one new overseas contract with the help of DBT, and a similar proportion (15%) had won between 2 and 5 contracts. The median number of contracts that DBT helped win was zero, for current exporters that used ESS-IM.

Chart 4.3.9 Number of new overseas contracts said to be won with the help of DBT in the last 12 months (including those who said DBT made no impact) – ESS-IM



Caption: QContractDBT: 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 DBT?

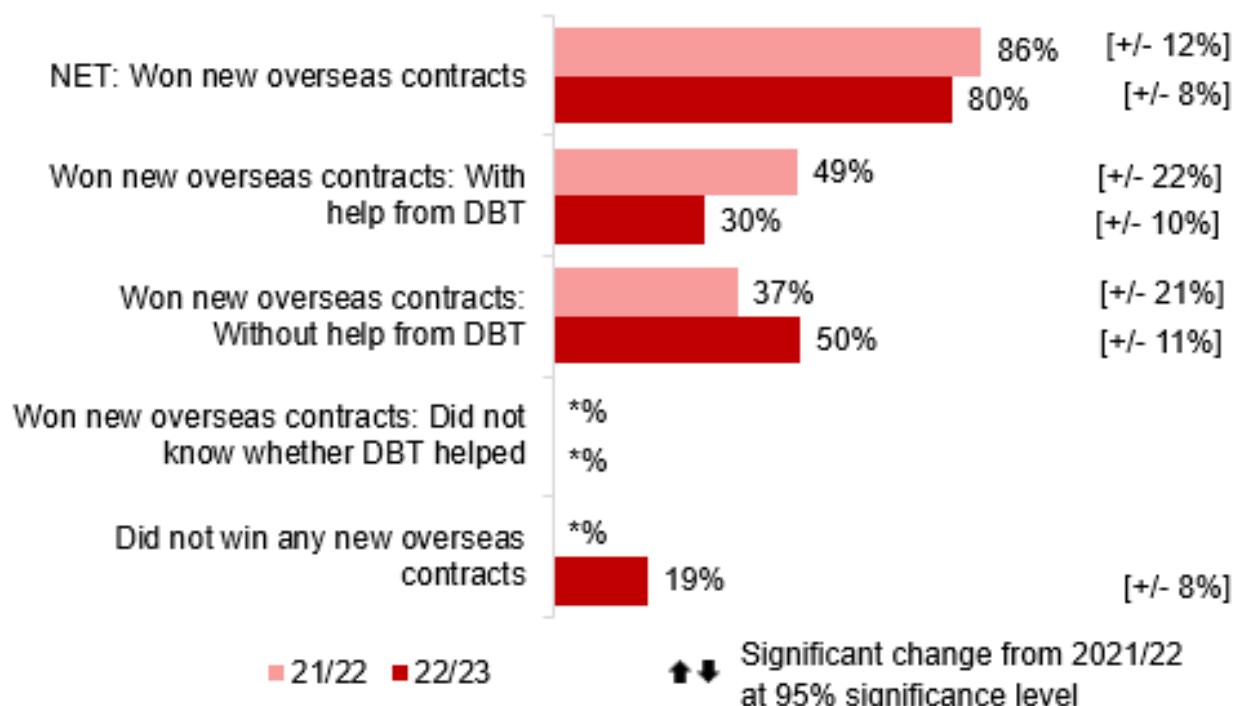
QContractNumber: How many new overseas contracts were won with help from DBT?

Base: All businesses that used Export Support Service- International Markets (ESS - IM) and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (n=97 (2022/23), n=29 (2021/22)). Median values include zero. * Redacted due to small base size

Description: Clustered bar chart comparing the number of new overseas contracts said to be won with the help of DBT in the last 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DBT (Chart 4.3.10). Among all businesses that had used ESS-IM, 80% said they had won new overseas contracts (either with help from DBT, without help from DBT, or were unsure whether DBT helped). More specifically, we estimate that 30% of ESS-IM respondents had won contracts with help from DBT, while 50% of ESS-IM respondents said they had won contracts without help from DBT.

Chart 4.3.10 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 DBT support – ESS-IM



Caption: Source: Composite measure merging data from several variables.

Base: All businesses that used Export Support Service- International Markets (ESS - IM) (n=120 (2022/23), n=36 (2021/22))

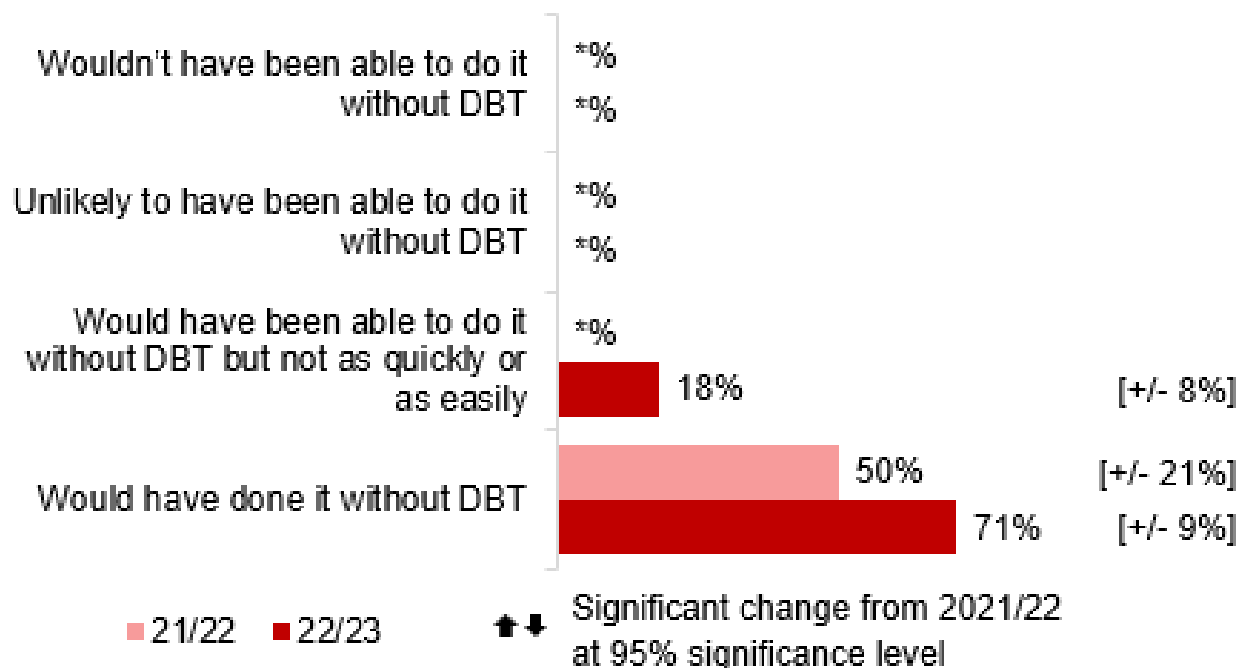
Description: Clustered bar chart comparing the proportion of businesses reported or estimated to have won or not won new overseas contracts with or without DBT support in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Importance of DBT's support in winning overseas contracts

The survey explored views on the importance of DBT'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 DBT in the last 12 months, since the delivery of the ESS-IM service. Exporting businesses that said that DBT 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 DBT' to better understand the level of support that the ESS-IM service provided.

Around 1 in 5 (18%) thought they would not have been able to do it as quickly or easily without DBT support (Chart 4.3.11). The remaining 71% thought they would have been able to achieve the same outcome without DBT support.

Chart 4.3.11 How important DBT's help was in winning overseas contracts – ESS-IM



Caption: QContractHelp: How important was DBT's help in winning these overseas contracts?

Base: All businesses that used Export Support Service- International Markets (ESS - IM) and won any new overseas contracts in the past year (n=97 (2022/23), n=29 (2021/22)). * Redacted due to small base size

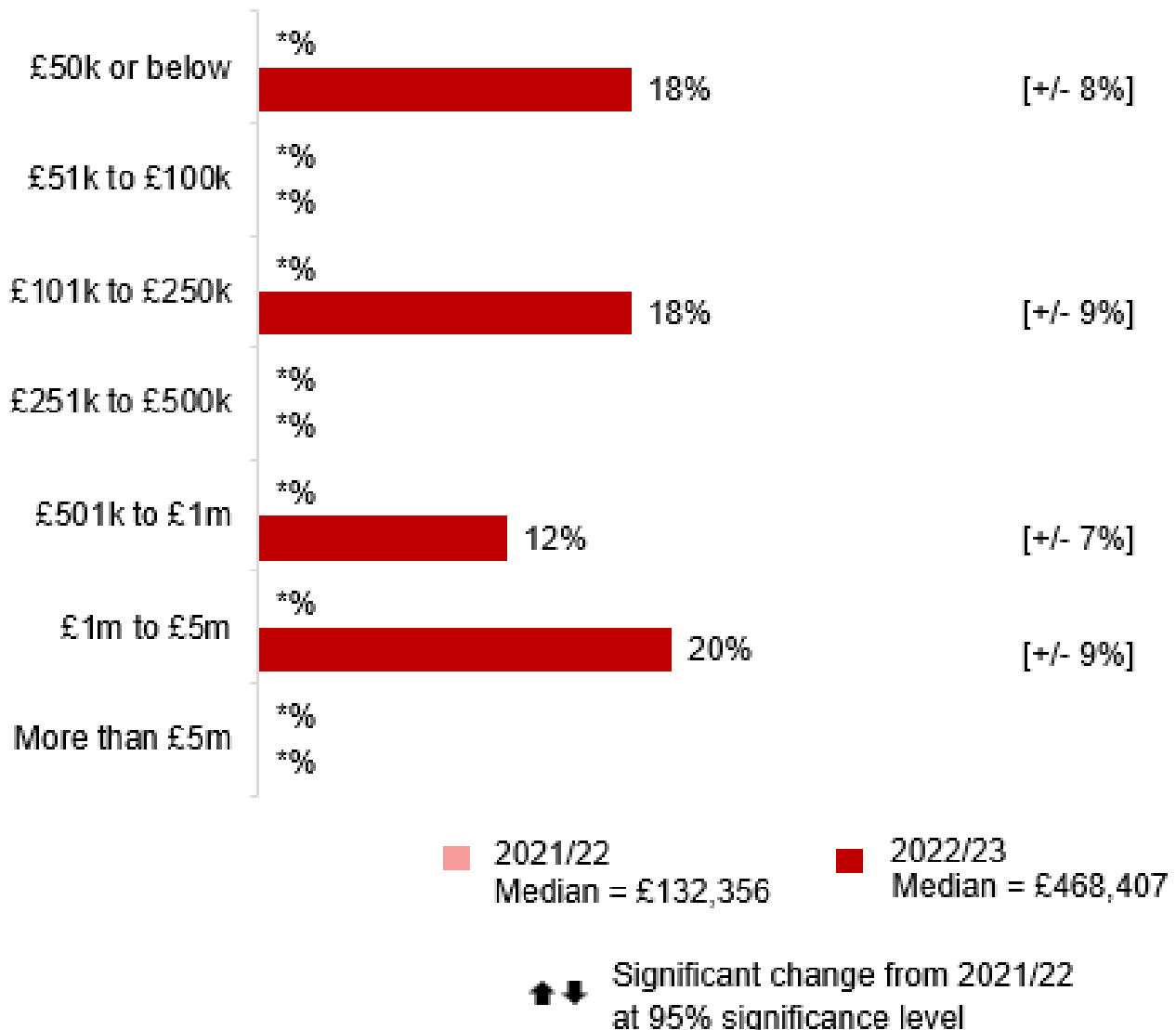
Description: Clustered bar chart comparing how important DBT's help was in winning overseas contracts in 2021/22 to 2020/21. The main findings were presented in the text preceding the chart.

4.3.6 Reported value of export sales achieved since receiving the service

Reported value of the export sales of new contracts

The 80% 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 4.3.12). The median value of the export sales of all new overseas contracts for these businesses was £468,407. Around one in five (18%) had won contracts with an export sales value of £50,000 or below., while 18% had won contracts with an export sales value between £101,000 to £250,000. Around 3 in 10 (28%) had won contracts with an export sales value of more than £1 million.

Chart 4.3.12 Value of all new overseas contracts made in previous 12 months – ESS-IM



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

Base: All businesses that used Export Support Service- International Markets (ESS - IM) and won any new overseas business contracts (n=97 (2022/23), n=28 (2021/22))

Description: Clustered bar chart comparing the value of all new overseas contracts made in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

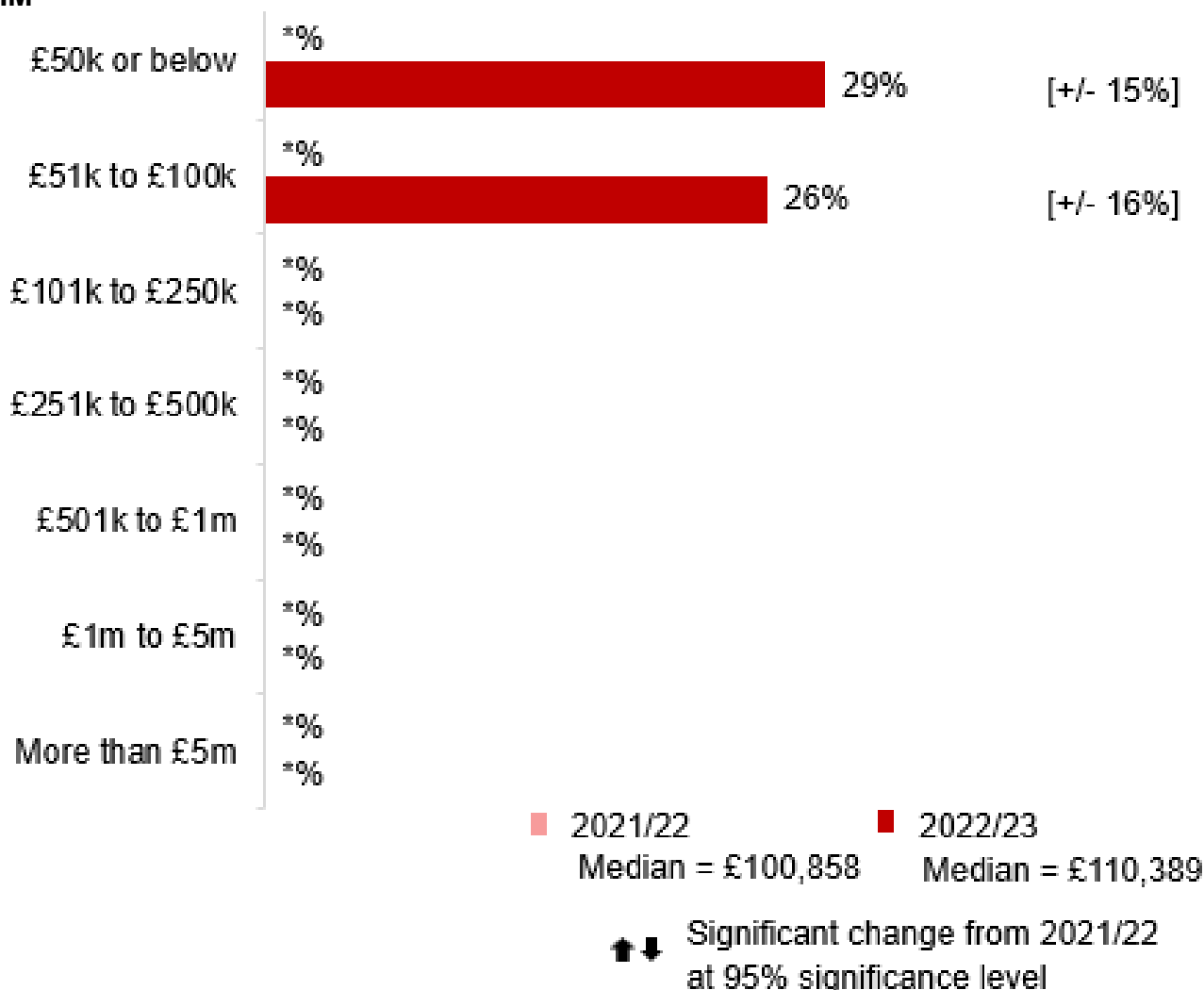
Reported additional value of DBT support

This section considers the value of DBT support to businesses. If businesses were not able to estimate the impact of the ESS-IM service, they were asked to think about the impact from all of their interactions with DBT. The analysis in this section measures the additional contribution that DBT 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 DBT support. This data was used to estimate the 'reported additional export sales' – that is, the reported additional impact of using DBT services on export sales. The reported additional export sales for ESS-IM were £110,389, across all the contracts that ESS-IM helped businesses to win. Note that this does not include businesses that did not win any new export contracts, or businesses that said DBT made no impact on overseas contract wins.

3 in 10 (29%) reported additional export sales of £50,000 or below, and 1 in 4 (26%) reported additional new export sales of between £51,000 and £100,000 (Chart 4.3.13).

Chart 4.3.13 Value of all new overseas contracts made in previous 12 months – ESS-IM



Caption: QContractValueDBT: What was the value of these new overseas business contracts that your business won with the help of support from the service or DBT last year?

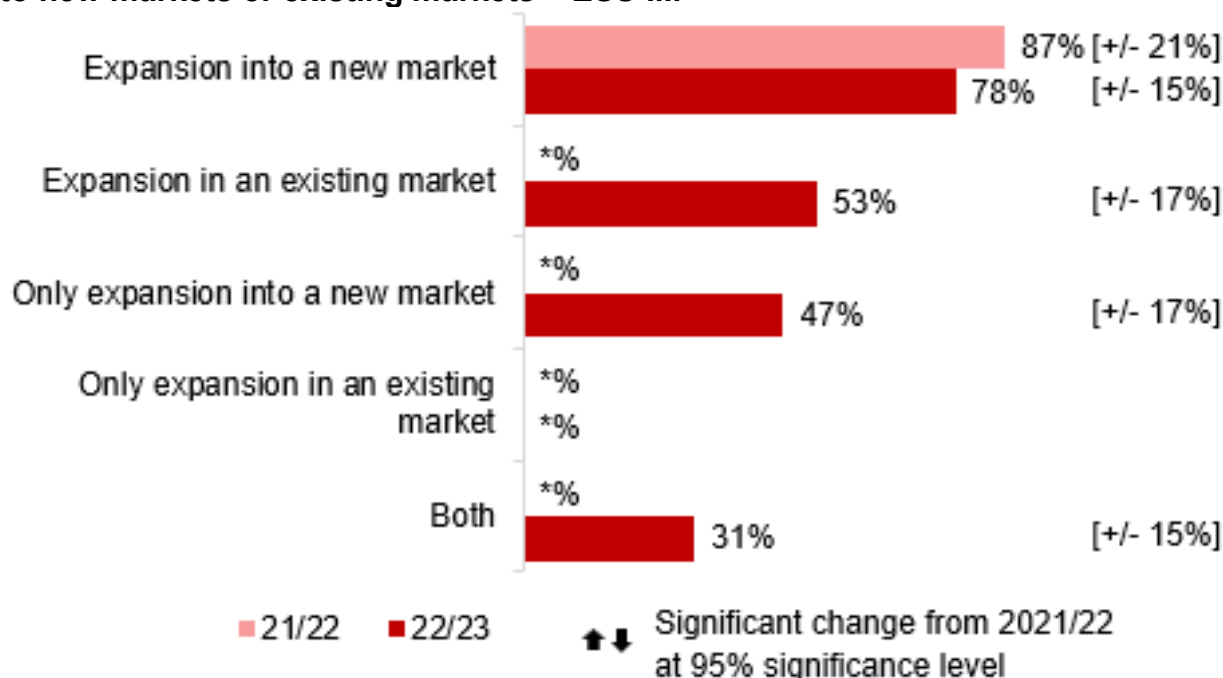
Base: All businesses that used Export Support Service- International Markets (ESS - IM) and won any new overseas business contracts with the help of DBT (n=39 (2022/23), n=13 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing the value of all new overseas contracts made with DBT support in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

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 (Chart 4.3.14). This question was asked to businesses that said DBT support helped them to win new overseas contracts and were able to provide details of the number and value of these contracts. Around 8 in 10 (78%) businesses said they were assisted with expansion into a new market and around half (53%) said they were assisted with expansion within an existing market. This includes 47% who said that DBT helped them expand into new markets (but not existing markets). 3 in 10 (31%) reported that DBT helped them expand into both existing and new markets.

Chart 4.3.14 Whether new contracts won with DBT's help represented expansion into new markets or existing markets – ESS-IM

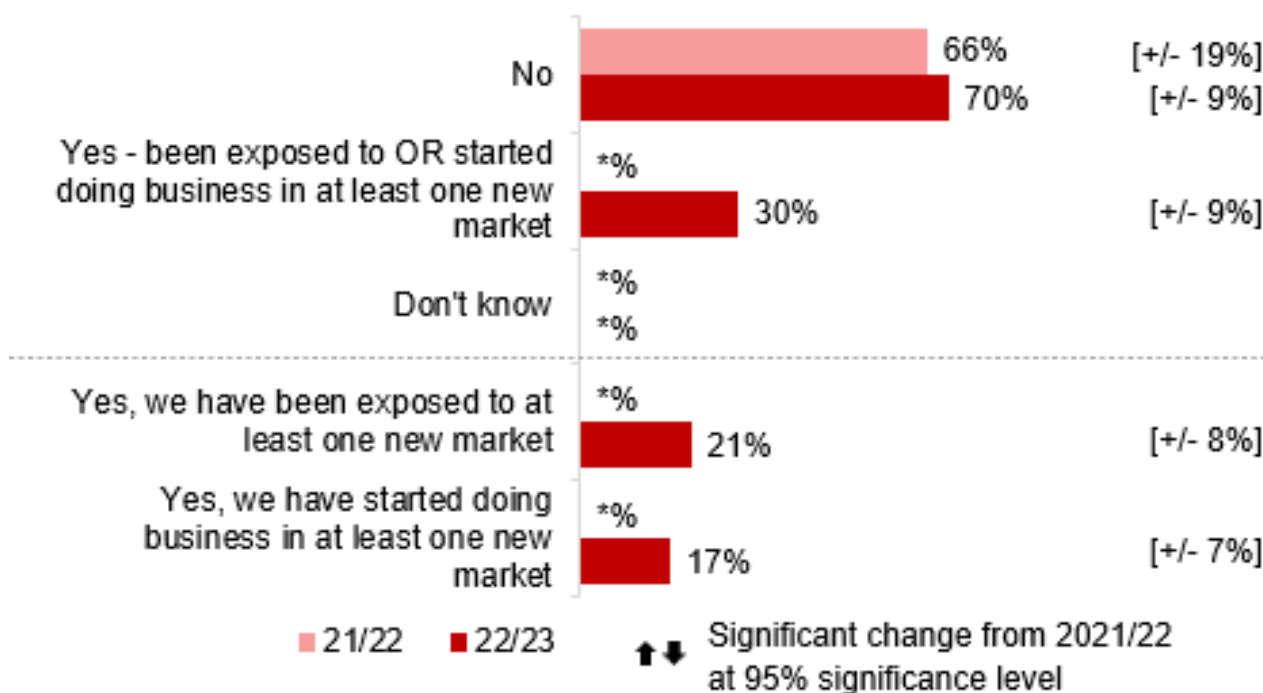


Caption: QContractRepresent: Did these new overseas contracts represent ...?
Base: All businesses that used Export Support Service- International Markets (ESS - IM) and won any new overseas business contracts with the help of DBT (n=39 (2022/23), n=13 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing whether new contracts won with DBT help represented expansion into new or existing markets in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

All businesses that used ESS-IM were asked whether they had increased their exposure or started doing business in any new markets because of using the ESS-IM service (Chart 4.3.15). 1 in 5 businesses (21%) said they had been exposed to at least one new market, while 1 in 6 (17%) reported that they had started doing business in at least one new market. Overall, 3 in 10 (30%) said they had either been exposed to, or had started doing business in, at least one new market.

Chart 4.3.15 Whether increased exposure or starting business in a new overseas market – ESS-IM



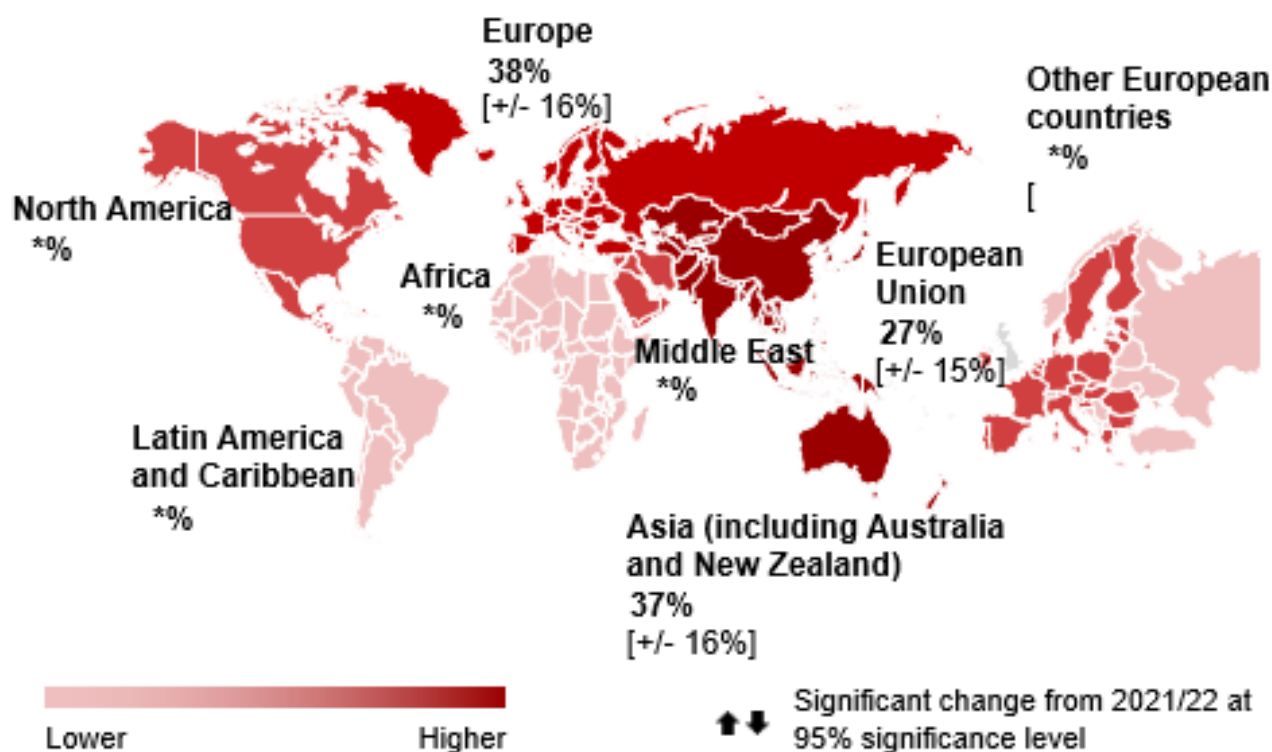
Caption: QGrowthDBT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?

Base: All businesses that used Export Support Service- International Markets (ESS - IM) (n=120 (2022/23), n=36 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing whether increased exposure or starting business in a new overseas market in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Chart 4.3.16 and Table 4.3.2 show that the most common new markets for increased exposure or business were Europe (38%) and Asia (including Australia and New Zealand) (37%). Looking in more detail at Europe, 27% reported that their increased exposure or new business was within the European Union, while 19% had new or increased exposure in other European countries.

Chart 4.3.16 The new markets that the organisations have started doing business in or been exposed to – ESS-IM



Caption: QNewRegion: Which of the following new markets has your business started doing business in or been exposed to?

Base: All businesses that used Export Support Service- International Markets (ESS - IM) and have had increased exposure to, or started doing business in at least one new market (n=39 (2022/23), n=8 (2021/22)). * Redacted due to small base size

Description: A map of the world. Regions that businesses have done more business in or are more exposed to are shown as darker. The main findings were presented in the text preceding the chart.

Table 4.3.2 The new markets that the organisations have started doing business in or been exposed to – ESS-IM

Region	2021/22	CI (+/-)	2022/23	CI (+/-)	Change
Europe	***%		38%	16%	-
European Union	***%		27%	15%	-
Other European countries	***%		***%		-
Asia (including Australia and New Zealand)	***%		37%	16%	-
North America	***%		***%		-
Latin America and Caribbean	***%		***%		-
Middle East	***%		***%		-
Africa	***%		***%		-
Base	8**		39*		

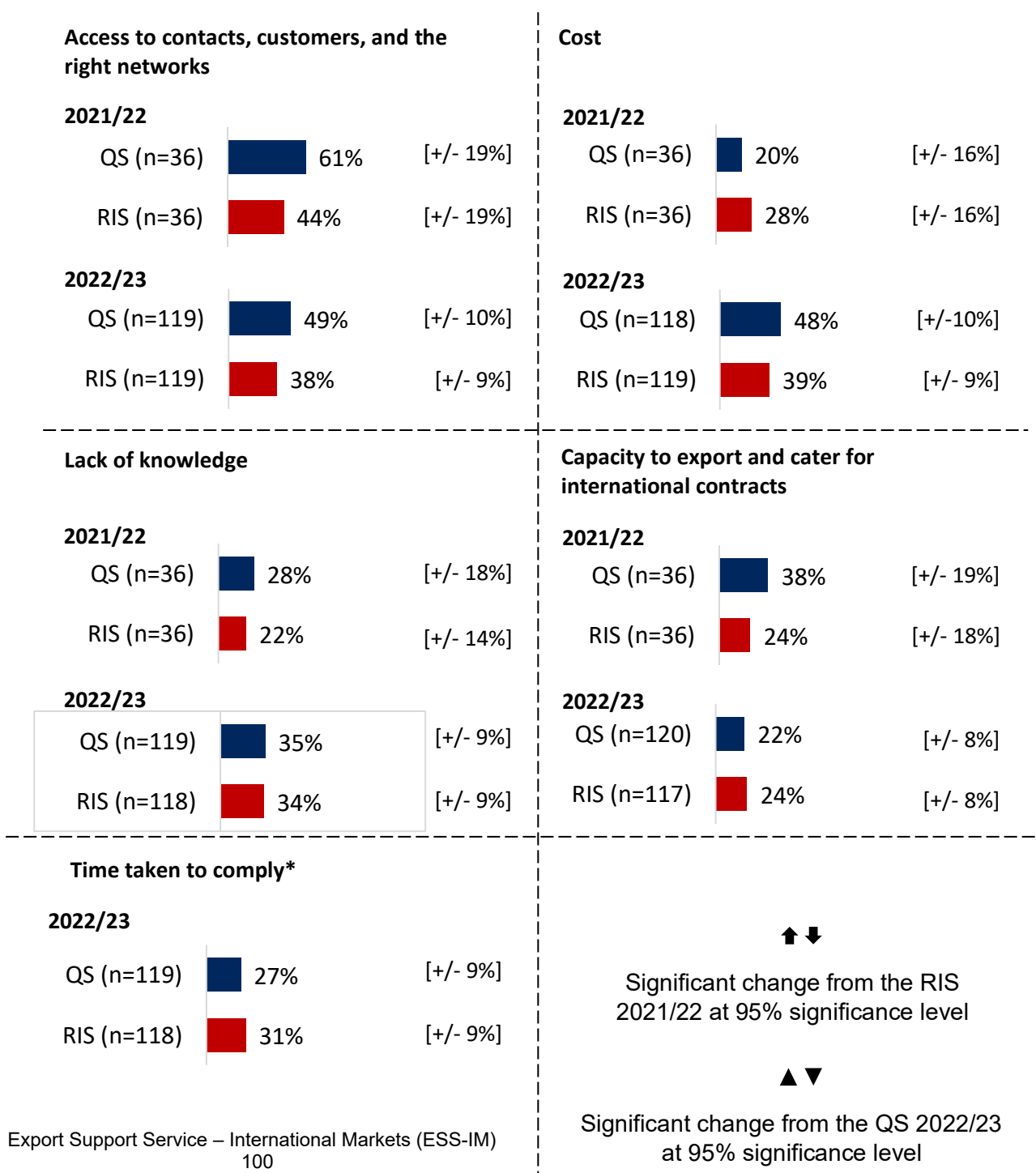
*Small base size; **Very small base size. *** Redacted due to small base size

4.3.8 Barriers to exporting

Businesses were asked in both the QS and RIS about 5 **potential barriers for their business in relation to exporting** (Chart 4.3.17); 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).

The top barriers in the RIS 2022/23 were 'cost' (39%) and 'access to contacts' (38%) followed by 'lack of knowledge' (34%). These results were in line with responses in the QS 2022/23.

Chart 4.3.17 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – ESS-IM



Caption: 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.

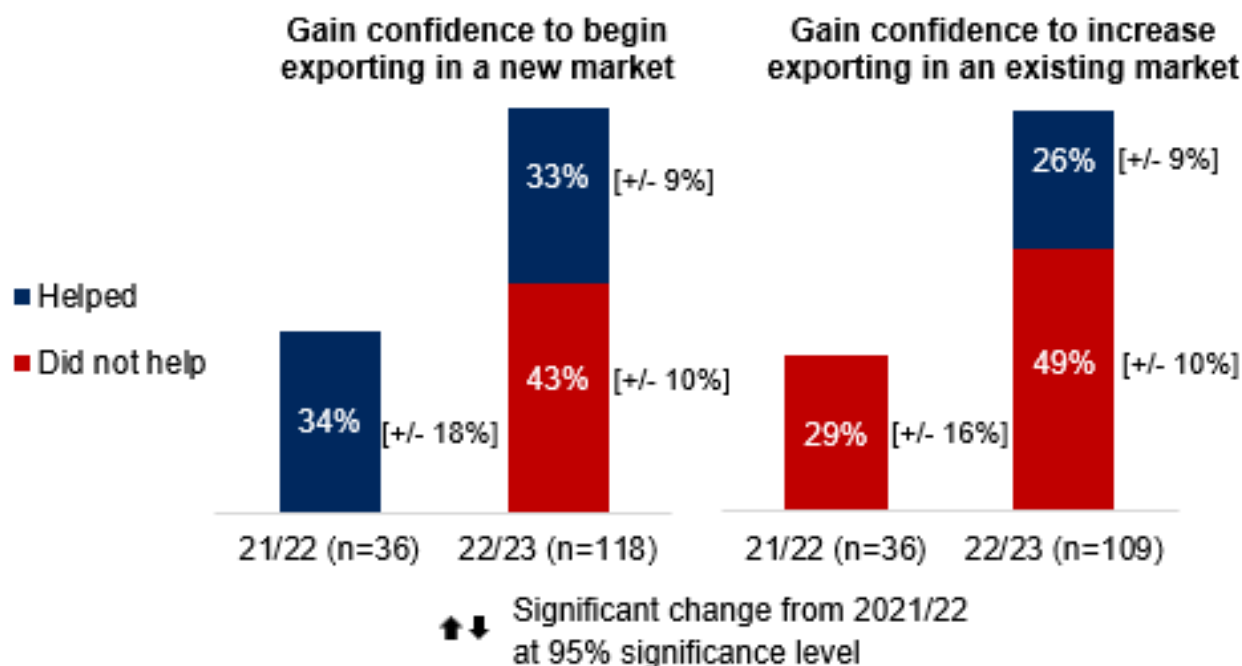
Base: All businesses that used the service not including those who gave a 'not applicable' answer. *Code amended or added in 2022/23

Description: A set of horizontal bar charts comparing the proportion of QS and RIS respondents encountered barriers. The barriers include access to contacts, customers and the right networks, cost, lack of knowledge, capacity to export and cater for international contracts and time taken to comply.

4.3.9 Wider benefits of the service

Businesses were asked to think about the extent to which using the ESS-IM service had given them confidence to begin exporting in a new market or increase exporting in an existing market (Chart 4.3.18). A third (33%) of businesses reported that using the ESS-IM service had helped them gain confidence to begin exporting in a new market, while more than 4 in 10 (43%) said the service had not helped them in this way. A quarter (26%) reported that using the ESS-IM service had helped them gain confidence for increasing exports in an existing market, but a larger proportion (49%) said the service did not help them to do this.

Chart 4.3.18 To what extent using the ESS-IM service helped to build confidence to export



Caption: 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 the service help you to ...? Helped (7-10), Neutral (4-6), Did not help (0-3).

Base: All businesses that used the service not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown. * Redacted due to small base size

Description: Stacked bar chart comparing confidence in exporting between QS and RIS in 2021/22 and 2022/23. The main findings were presented in the text preceding the chart.

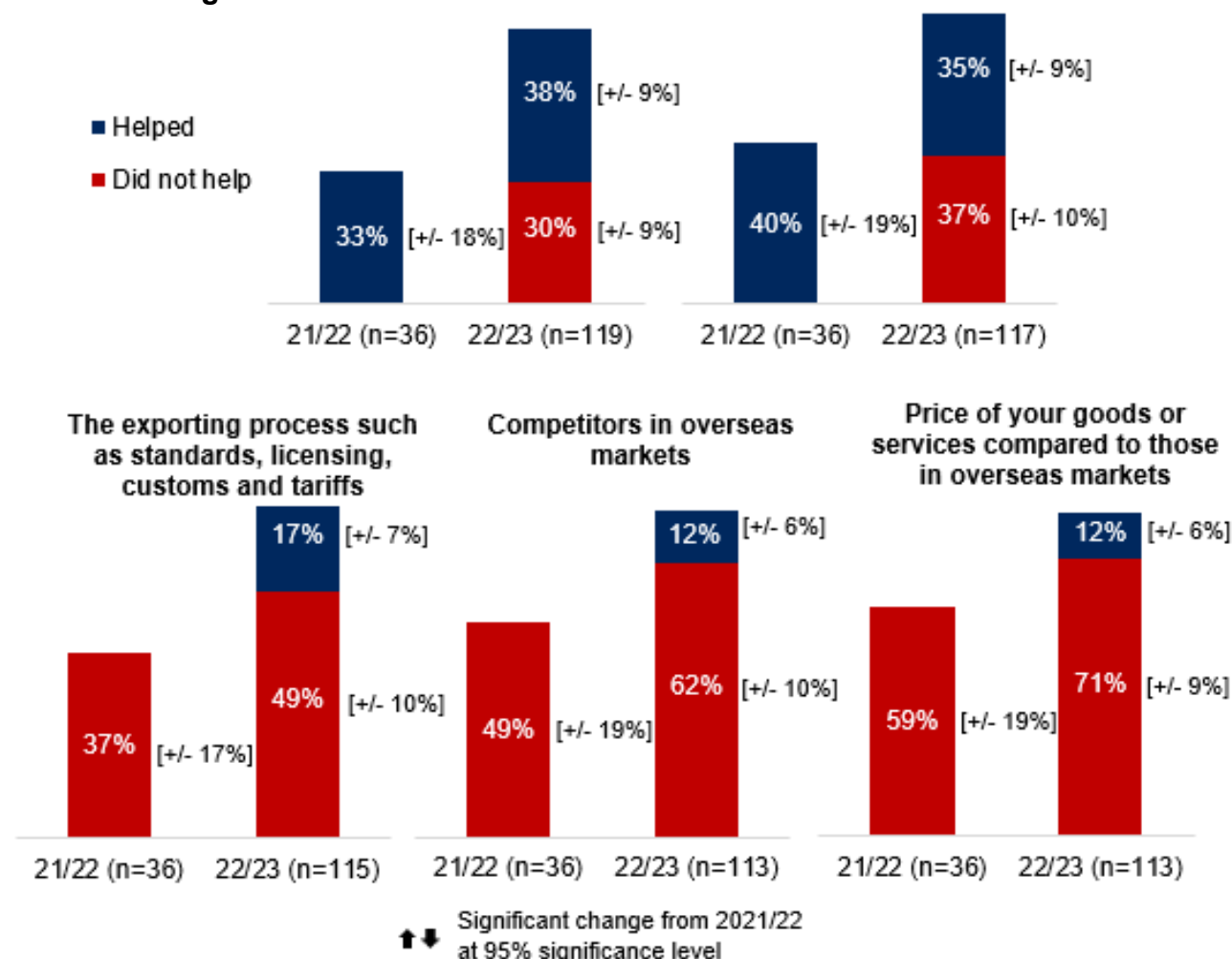
Businesses were asked to think about the extent to which the service had **helped them improve their knowledge**. Chart 4.3.19 below shows how businesses rated the impact of using the ESS-IM service on their knowledge.

On balance, businesses were more likely to say that the service helped to **increase their knowledge of support available to them (from DBT and elsewhere)** (38%), rather than to say that it did not help them (30%).

Around a third (35%) said the service helped to increase their knowledge of **export opportunities available**, while a similar proportion (37%) said it did not help them do this.

Half (49%) of businesses said that the service **did not help to improve their knowledge of the exporting process**, such as standards, licensing, customs, and tariffs, while 17% of businesses said the service did help them in this way. Only small proportions said that using ESS-IM improved their knowledge about their **competitors in overseas markets** (12%) and of **the price of goods** compared with those in overseas markets (12%).

Chart 4.3.19 To what extent the business felt that their knowledge has improved as a result of using the service – ESS-IM



Caption: QImproveKnowledge: Using the same scale, to what extent do you feel that your business improved its knowledge of the following as a result of the service? Helped (7-10), Neutral (4-6), Did not help (0-3).

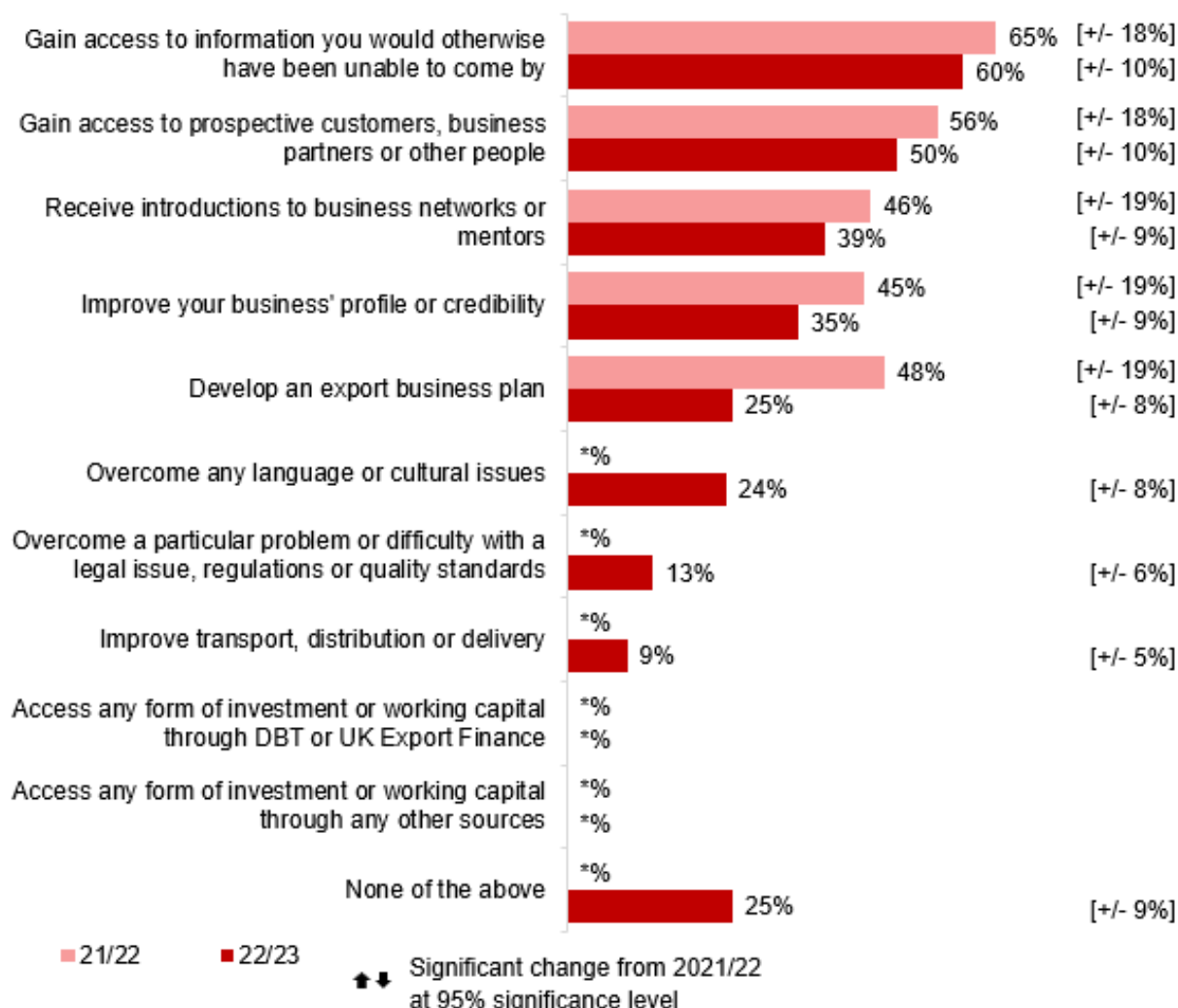
Base: All businesses that used the service not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown. * Redacted due to small base size

Description: Five stacked bar chart comparing the extent to which businesses felt their knowledge had improved as a result of using the service, between QS and RIS in 2021/22 and 2022/23. The main findings were presented in the text preceding the chart.

Businesses were asked about other ways they had benefitted from using ESS-IM in the year between dealing with the ESS-IM and taking part in the RIS. A detailed breakdown of responses is shown in Chart 4.3.20.

The top responses were: helping businesses to gain information that they would otherwise have been unable to come by (60%) and to gain access to prospective customers, business partners or other people that they otherwise would have been unable to meet (50%). A quarter (25%) felt that using the ESS-IM service had not helped them in any of the ways listed.

Chart 4.3.20 In what ways has the business felt it benefited from DBT support – ESS-IM

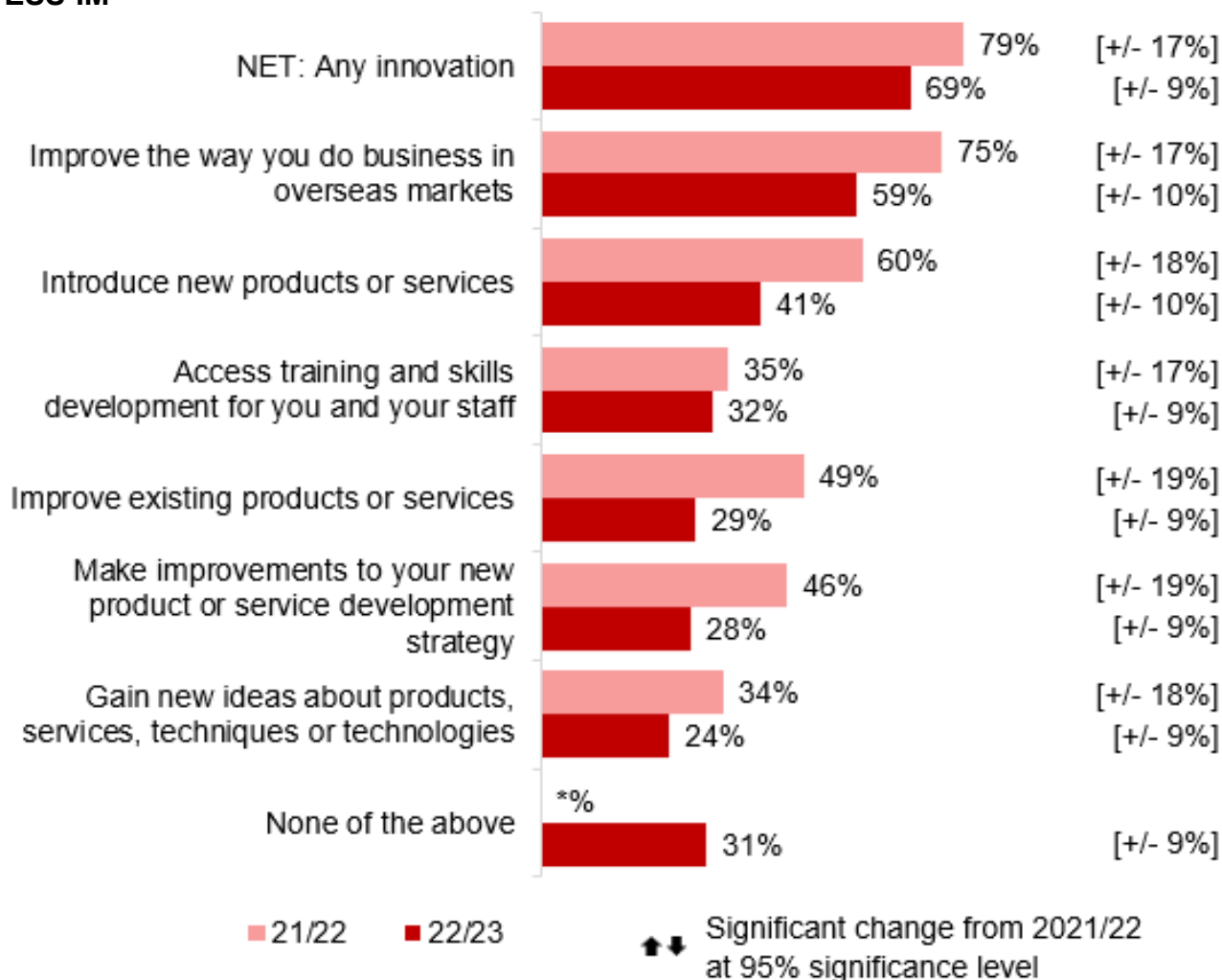


Caption: QServiceBenefit: in which of the following ways if any, has your business benefited specifically from the service over the last year?
 Base: All businesses that used Export Support Service- International Markets (ESS - IM) (n=120 (2022/23), n=36 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing how businesses felt they had benefitted from DBT support in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

Businesses were asked whether using the ESS-IM service had helped, or was likely to help, support innovation and/or development in their business (Chart 4.3.21). Around two thirds (69%) 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 (59%) and to introduce new products or services (41%).

Chart 4.3.21 Whether the service has / is likely to help innovation and development – ESS-IM



Caption: QInnovationSupport: Has this service helped or do you expect it to help your business with development and/or innovation?

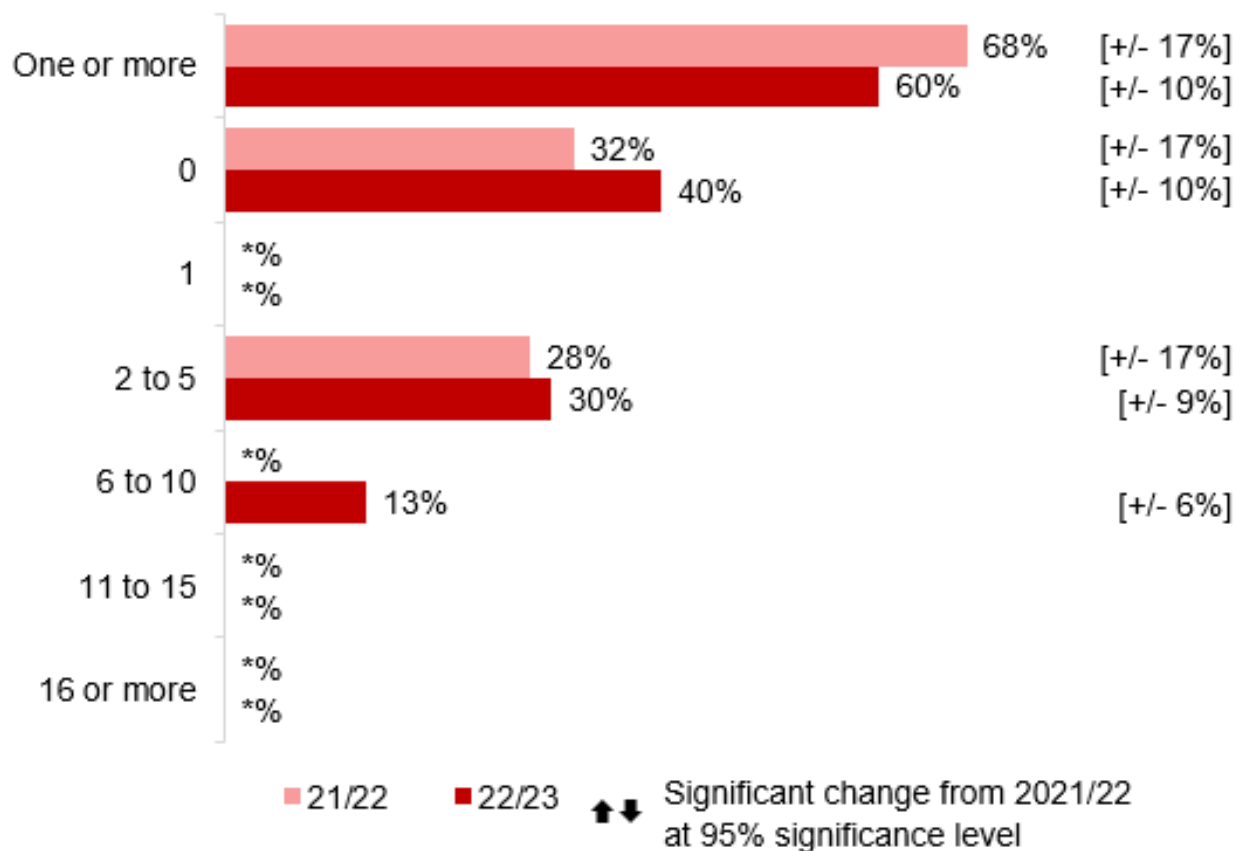
Base: All businesses that used Export Support Service- International Markets (ESS - IM) (n=120 (2022/23), n=36 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing if businesses felt the service had been or is likely to help innovation and development in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

International contacts

Businesses were asked how many overseas contacts they had made as a result of using ESS-IM over the past year (Chart 4.3.22). 6 in 10 (60%) businesses made at least one new overseas contact in the year since using the ESS-IM service. 3 in 10 (30%) made between 2 and 5 new contacts and 13% made more than 10. 2 in 5 (40%) businesses reported that they had not made any new contacts as a result of using the ESS-IM service. The median number of contacts made was 2.

Chart 4.3.22 Number of new overseas contacts made in previous 12 months – ESS-IM



Caption: QContactsMade: How many new overseas contracts, if any, did your business make as a result of the service in the past year?

Base: All businesses that used Export Support Service- International Markets (ESS - IM) (n=120 (2022/23), n=36 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing the number of new overseas contacts made in the previous 12 months in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

Businesses were asked about the impact they had seen or expected to see as a direct result of using the ESS-IM service (Chart 4.3.23). 4 in 10 businesses (41%) said they thought using the ESS-IM service had, or would, increase or improve the skills of existing UK employees, and the same proportion (41%) said they had seen, or would see, increased export sales per employee. Slightly fewer businesses mentioned improved job satisfaction of existing UK employees (38%) and safeguarding jobs in the UK (34%).

Chart 4.3.23 Changes expected / seen in the UK business as a result of receiving the service – ESS-IM



Caption: QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service?

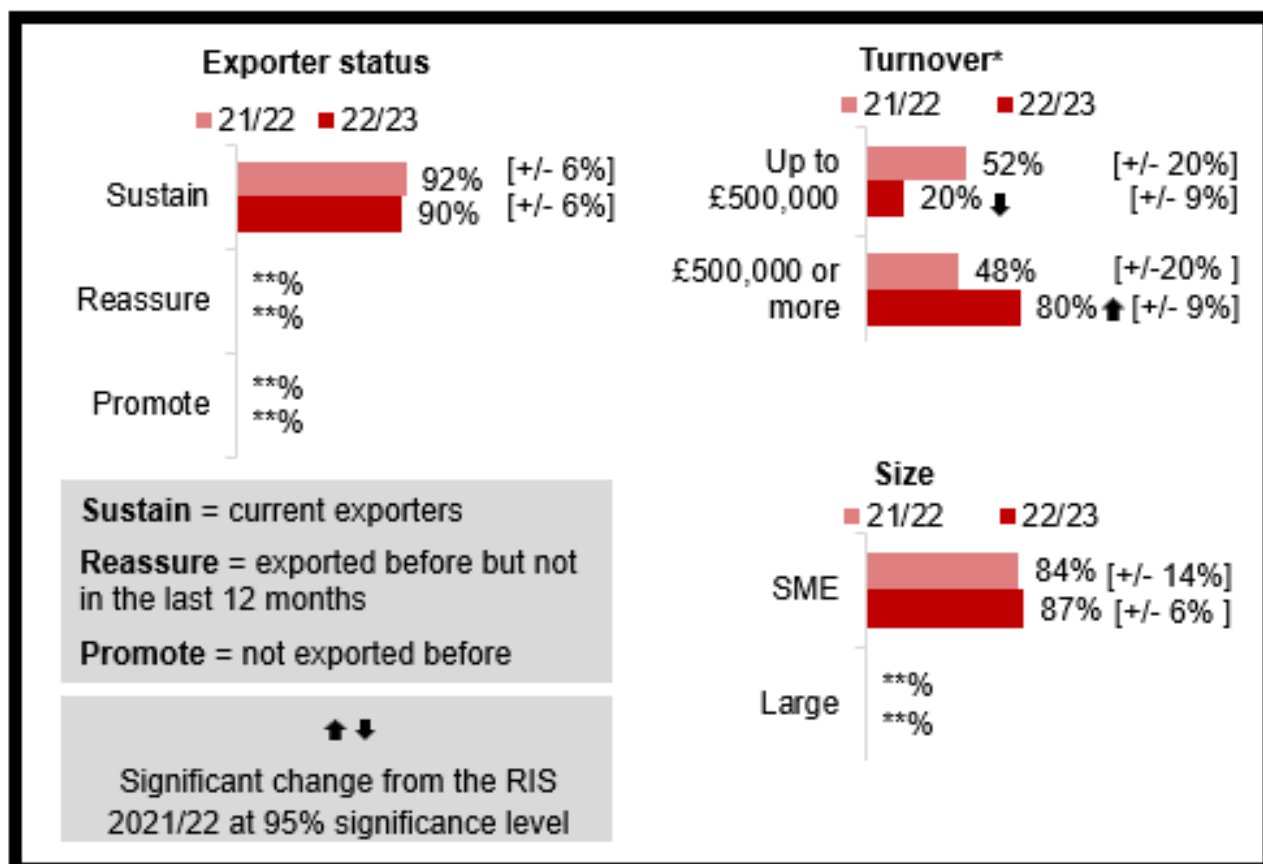
Base: All businesses that used Export Support Service- International Markets (ESS - IM) (n=120 (2022/23), n=36 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing changes expected or seen in the business as a result of using the service in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

4.3.10 Profile of respondents

As shown in Chart 4.3.24, among businesses supported by ESS-IM 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), 9 in 10 (90%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months. Almost 9 in 10 businesses were SMEs (87%), and 8 in 10 reported an annual turnover of £500,000 or more (80%).

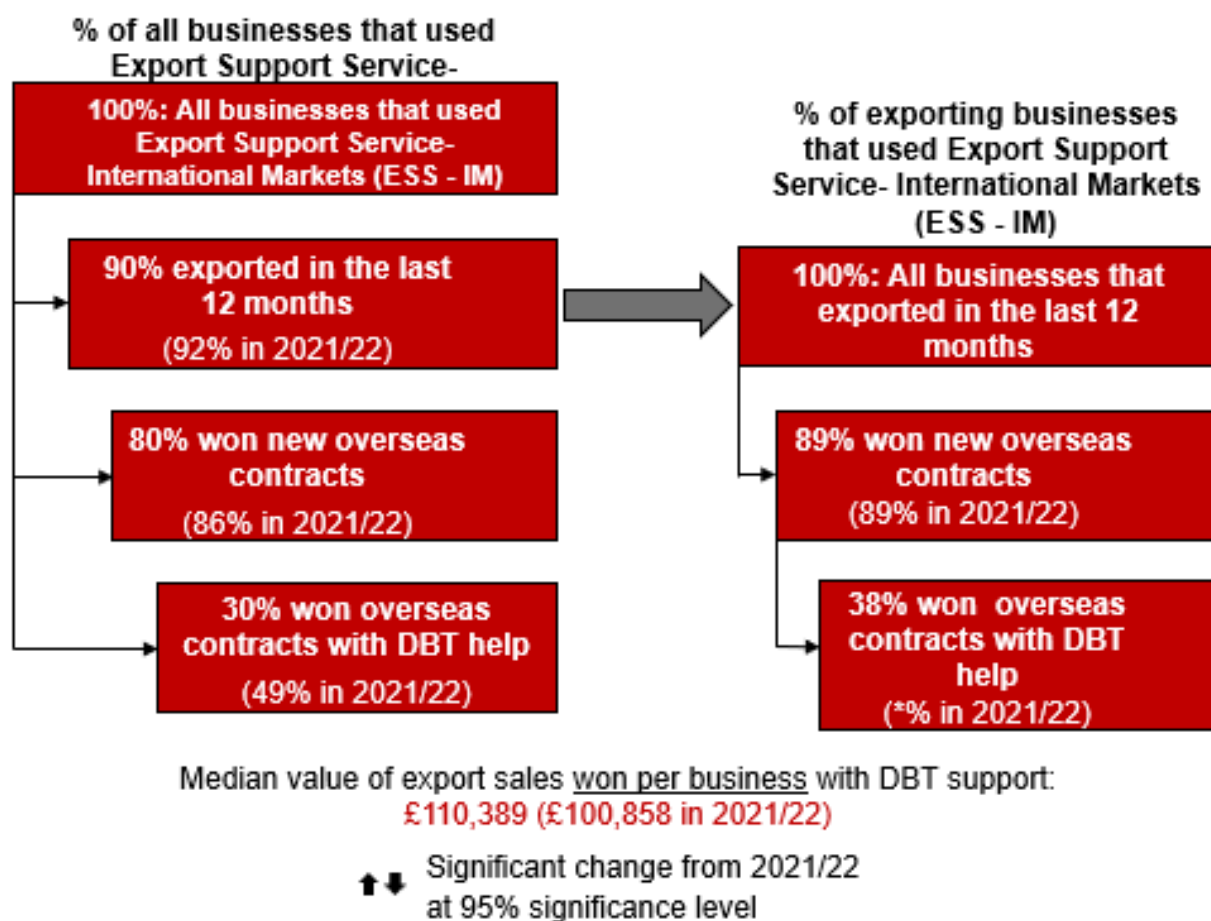
Chart 4.3.24 Profile of RIS Respondents – ESS-IM



Caption: Base: All businesses that used Export Support Service- International Markets (ESS - IM) (n=120 (2022/23), n=36 (2021/22)); *All businesses that used Export Support Service- International Markets (ESS - IM) not including 'Don't know' and 'Refused' responses (n=81 (2022/23), n=31 (2021/22)). ** Redacted due to small base size

Description: Three clustered bar charts comparing exporter status, turnover and size in 2022/23 and 2021/22. The main findings were presented in the text preceding the chart.

Chart 4.3.25 Summary of businesses supported by ESS-IM



Caption: Base: All businesses that used Export Support Service- International Markets (ESS - IM) (n=120 (2022/23), n=36 (2021/22)); All businesses that used Export Support Service- International Markets (ESS - IM) and that exported in the last 12 months (n=109 (2022/23), n=34 (2021/22)); All businesses that used Export Support Service- International Markets (ESS - IM) and that won at least one overseas business contract in the last 12 months (n=97 (2021/22), n=29 (2021/22)); All businesses that used Export Support Service- International Markets (ESS - IM) and that won at least one overseas business contract with the help of DBT (n=39 (2021/22), n=13 (2021/22)). * Redacted due to small base size

Description: Flow chart showing how the proportion of overseas contracts won with DBT help is calculated. These findings are described in detail earlier in this chapter.

4.4 Export Academy

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

This chapter explores the impact of using the Export Academy service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 338 businesses that used Export Academy between April 2022 and March 2023 and participated in both the Quality Survey (QS) and RIS.

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

Actions taken as a result of using Export Academy

Following their use of the Export Academy service, more than eight in ten (86%) businesses had taken some sort of action as a result of using the service. More than half of businesses reported that they had identified new export opportunities or made new contacts (58%), while around half had researched the paperwork and regulations needed to export (52%). Among non-exporters, two thirds (66%) had assessed their readiness to export after using Export Academy. These results were in line with the previous year.

Impact on exporting

Around four fifths (78%) of businesses were classified as 'Sustain' (i.e. currently exporting), in line with findings from the QS 2022/23 (76%).

A fifth (18%) of businesses that were classified as 'Promote' (i.e. never exported before) in the QS 2022/23 had shifted to 'Sustain' in the RIS 2022/23.

Impact on winning contracts

Of the businesses that exported, 8 in 10 (79%) reported winning new overseas business contracts or gaining extensions to existing overseas contracts in the past year since using the Export Academy service.

Overall, 55% of businesses won a new overseas contract, including 19% saying this was with Export Academy or DBT assistance. Among businesses that reported DBT support was important in helping them win these contracts,.

Impact on exposure and growth

3 in 5 businesses (61%) who won any new overseas business contracts with the help of DBT said Export Academy assisted with expansion into a new market, and four fifths (82%) said Export Academy assisted with expansion within an existing market.

Among all businesses, around 1 in 8 (13%) reported being exposed to or starting to do business in at least one new market. Among these businesses, Asia (including Australia and New Zealand) was the most common new market for increased exposure or business

(47%), while 2 in 5 (40%) of these businesses reported having increased exposure or business in Europe. These results were in line with the previous year.

Impact on contacts and networks

Around a third of businesses (35%) made at least one new overseas contact after using Export Academy (2 contacts on average), although 63% reported DBT support did not make any difference to making exporting contacts.

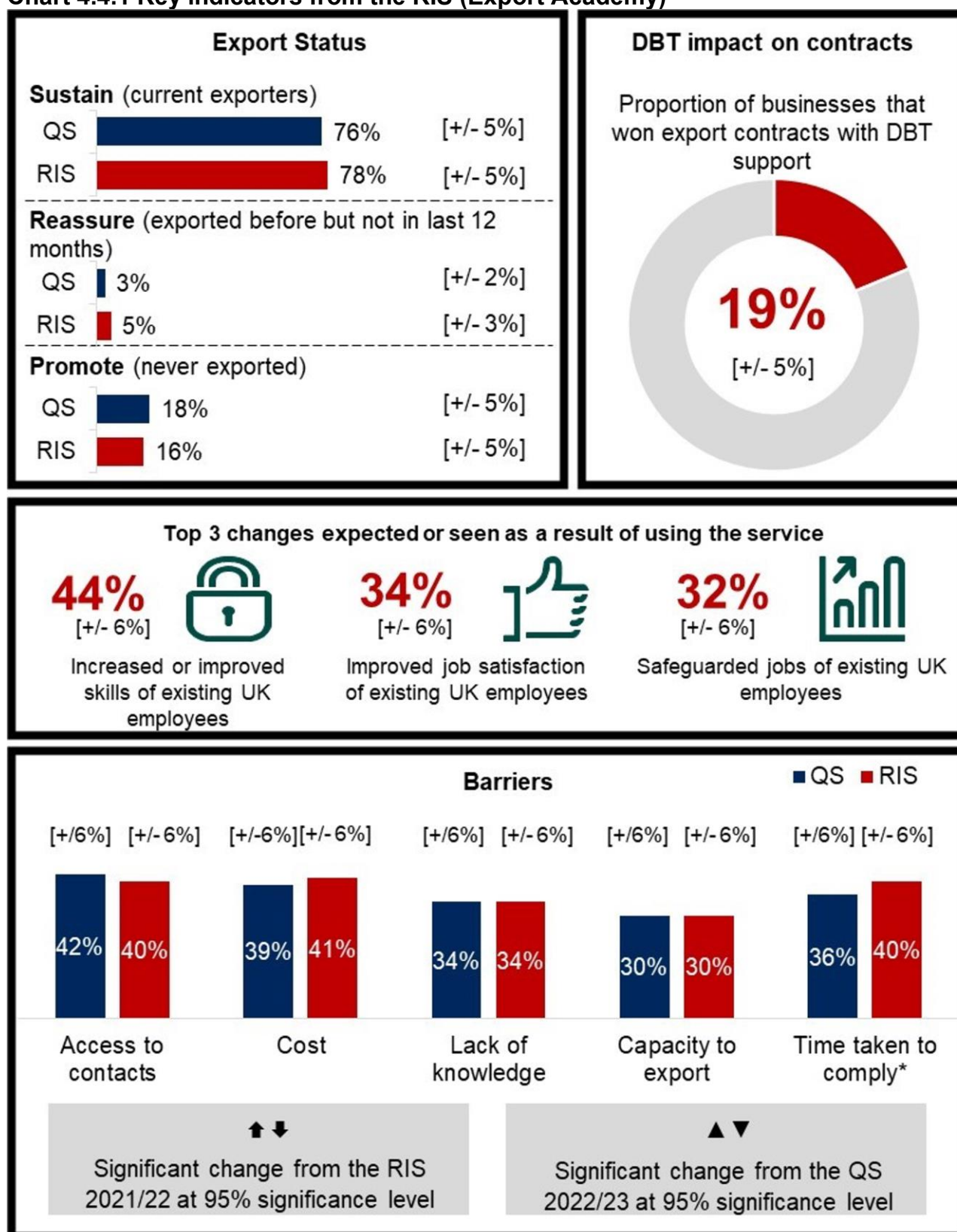
Impact on confidence

Around a third of businesses reported that using the Export Academy service boosted their confidence to export in a new market (35%), while a similar proportion (30%) said this for increasing exports in an existing market. These results were in line with the previous year.

Other impact

More than half (58%) of Export Academy respondents reported that the Export Academy service helped them to gain access to information that they would otherwise have been unable to come by.

Chart 4.4.1 Key indicators from the RIS (Export Academy)



Caption: Base: All businesses that used Export Academy and completed both surveys (n=338); Barriers - Access to contacts (QS n=332, RIS n=335), Cost (QS n=333, RIS

n=333), Lack of knowledge (QS n=331, RIS n=334), Capacity to export (QS n=329, RIS n=332), Time to comply (QS n=330, RIS n=330 * Code amended or added in 2022/23).

Description: A collection of charts showing headline findings for businesses using the service. This includes findings for export status, DBT impact on contracts, changes expected or seen as a result of using the service and barriers. These findings are described in more detail throughout this chapter.

4.4.2 Satisfaction with Export Academy (from Quality Survey)

In the QS 2022/23, half of businesses (49%) that used Export Academy said they would recommend the service, while around 1 in 5 (22%) said they would not. This gave Export Academy a Net Promoter Score (NPS) of +27. Two thirds (68%) reported that they were satisfied with the Export Academy service, and around 3 in 5 (62%) said the overall service met their needs.

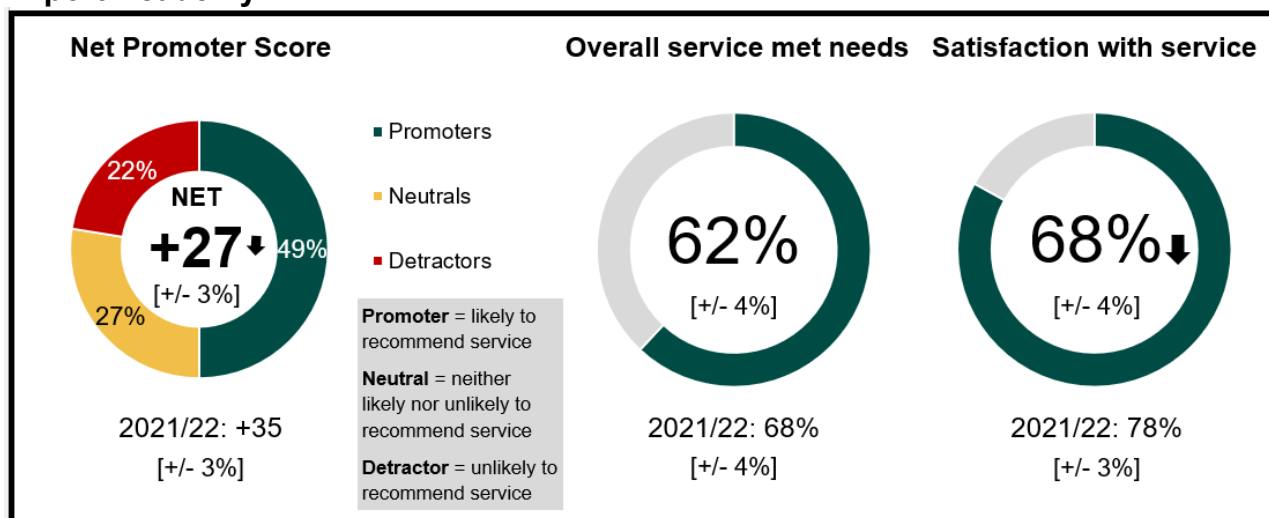
Compared to the previous year, the NPS decreased (+27, down from +35 in 2021/22), as did the proportion satisfied with the service (68%, down from 78%).

Export Academy respondents were particularly positive about the staff knowledge (85%) and the straightforwardness of the registration process (84%). Compared to the previous year, fewer businesses were positive about staff knowledge (85%, compared to 90% in 2021/22), how comprehensive the information was (78%, compared to 84%), the amount of time taken to receive information (72%, compared to 82%) and the clarity of the steps they needed to take, both when using the service (72%, compared to 78%) and after using the service (59% compared to 70%).

As a result of using Export Academy, half of businesses (49%) that were not exporting at the time of using the service had assessed the business' readiness to export. Among all Export Academy respondents, 49% said they had researched the paperwork and regulations needed to export. Compared to the previous year, more businesses had identified new export opportunities or made new contacts (43%, compared to 38% in 2021/22), looked for other export support services (34%, compared to 26%), made investments to support exporting (23%, compared to 16%), used other export services (22%, compared to 15%) and secured finance or funding (11%, compared to 8%). However, businesses were less likely to have started or increased exporting (16%, compared to 21% in 2021/22).

Export Academy respondents were most likely to report that 'cost' was a barrier to exporting (41%).

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



Caption: From the Quality Survey 2022-23:

Qlikrec: Based on your experiences of the service, how likely is it that you would recommend using the service to a colleague or business associate who had similar needs to yours, using the same scale as before?

Base: All businesses that used the service (n=914).

Qqualinfo: How would you rate the extent to which the overall service received met your needs?

Base: All businesses that used the service (excluding 'not applicable' responses) (n=882).

Qsatis: Thinking about your overall experience of the service, how satisfied were you with this service?

Base: All businesses that used the service (excluding 'not applicable' responses) (n=903).

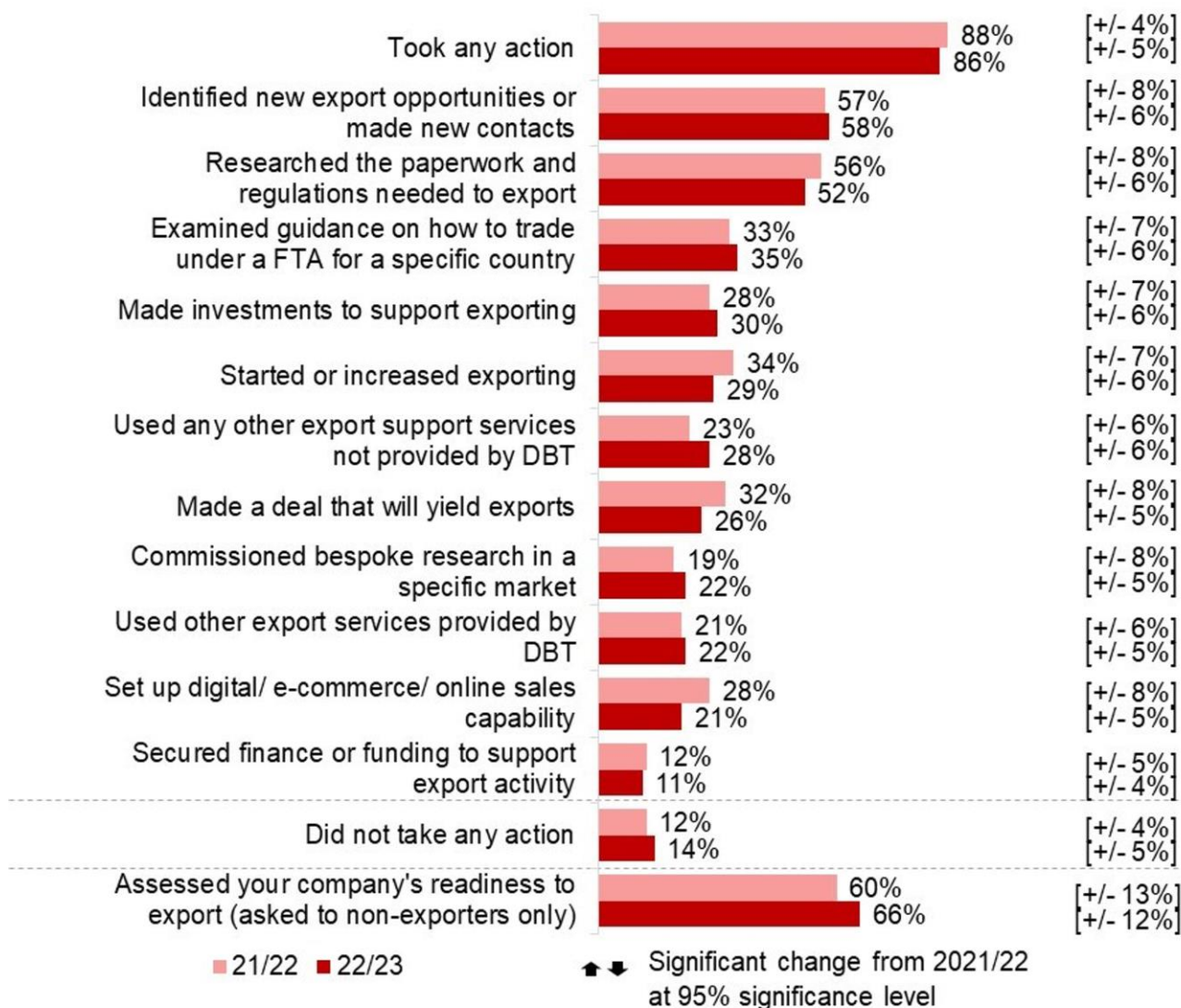
Description: A collection of three circle charts, showing the NPS score – broken down into Promoters, Neutrals and Detractors – followed by the percentage that thought the overall service met needs, and the percentage satisfaction with service.

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 Academy service (Chart 4.4.3). More than 8 in 10 businesses (86%) reported taking any action. More than half of businesses reported that they had identified new export opportunities or made new contacts (58%), while around half had researched the paperwork and regulations needed to export (52%). Two thirds of businesses (66%) that were not exporting had assessed their business' readiness to export. These results were in line with the previous year.

Using other export support services not provided by DBT was more common among businesses with a turnover of £500,000 or more (32%) than among those with lower turnovers (18%). However, setting up digital, e-commerce or online sales capability was more common among businesses with a turnover of up to £500,000 (29%) than among those with a higher turnover (12%).

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

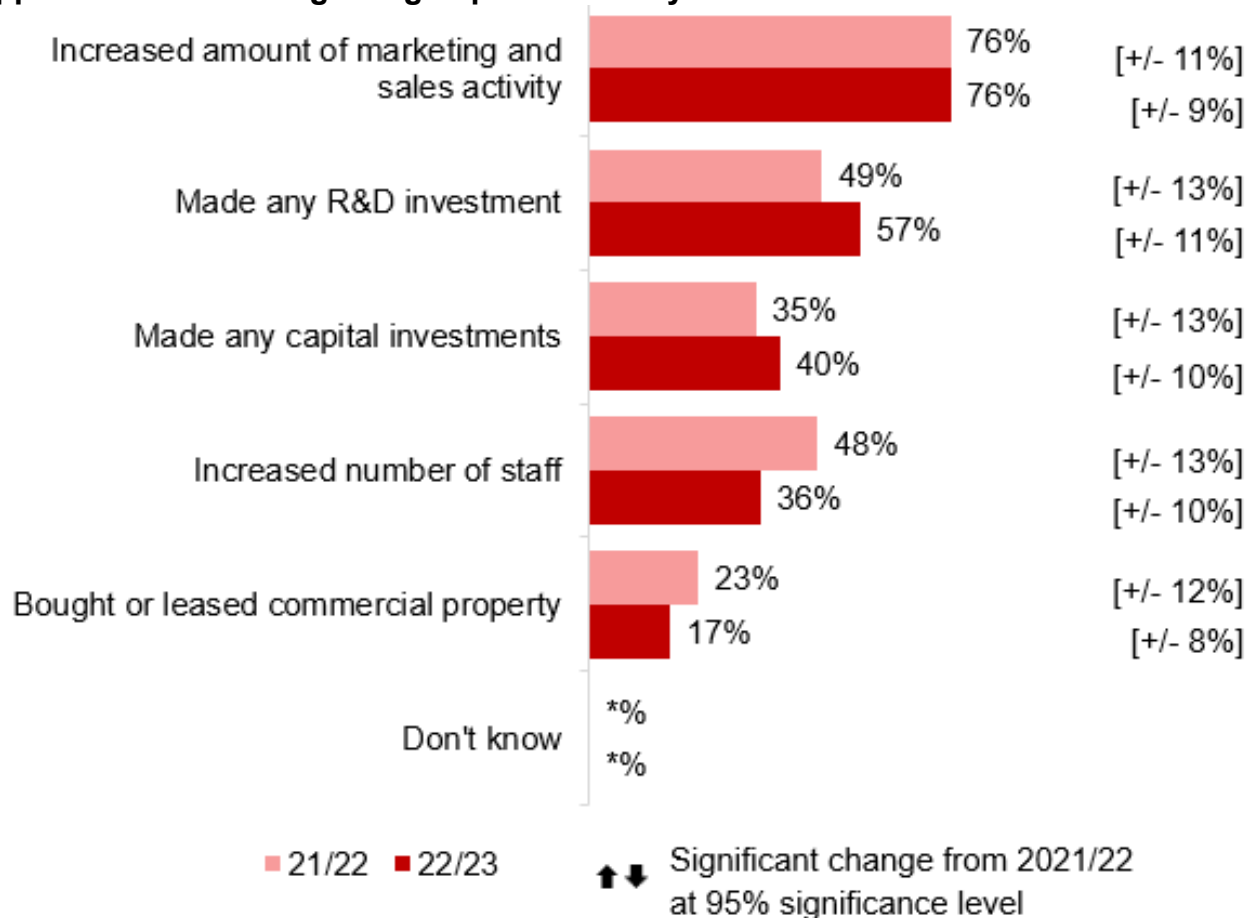


Caption: QResultService: What has your business done as a result of the service?
 Base: All businesses that used Export Academy (n=338 (2022/23), n=251 (2021/22)); All businesses that used Export Academy and were non-exporters (n=82 (2022/23), n=63 (2021/22))

Description: Clustered bar chart comparing what businesses have done as a result of using the service in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Businesses that had made an investment as a result of using the Export Academy service were asked what investments they had made (see Chart 4.4.4). The most common answer was an increase in marketing and sales activity (76%), followed by R&D investment (57%). These results were in line with the previous year.

Chart 4.4.4 Type of investments made to support new or increased export opportunities following using Export Academy



Caption: QInvestmentMade: Which of the following investments has your business made to support new or increased export opportunities?

Base: All businesses that used Export Academy and made investments to support exporting as a result of using Export Academy (n=110 (2022/23), n=67 (2021/22)). * Redacted due to small base size

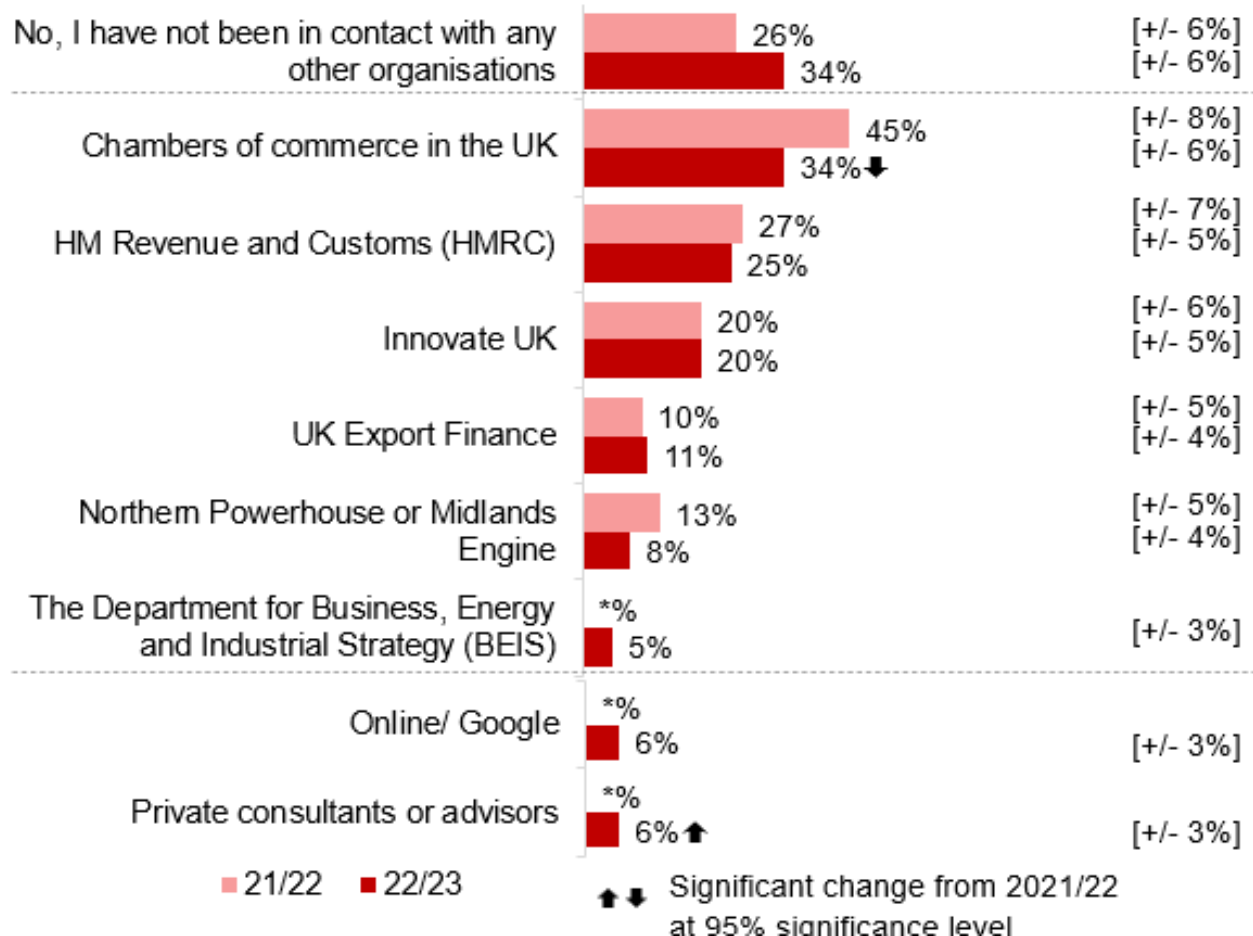
Description: Clustered bar chart comparing what type of investments businesses have made to support new or increased export opportunities following using Export Academy in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Businesses were asked what organisations they had been in contact with since using Export Academy (Chart 4.4.5). A third (34%) had been in contact with the Chambers of Commerce in the UK and a quarter (25%) had been in contact with HMRC. 1 in 5 (20%) had been in contact with Innovate UK. A third (34%) of businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Businesses with a turnover of up to £500,000 were more likely than those with a higher turnover to have been in contact with Innovate UK (33% compared with 14%) and UK Export Finance (14% compared with 4%).

Compared to the previous year, businesses were less likely to have been in contact with the Chambers of Commerce in the UK since using Export Academy (34%, down from 45% in 2021/22).

Chart 4.4.5 What organisations respondents have been in contact with since receiving the service – Export Academy



Caption: QAnyContact: Since your business used the service 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 Academy (n=338 (2022/23), n=251 (2021/22)).

Coded responses with 5% or more in 2021/22 or 2022/23 are included. * Redacted due to small base size

Description: Clustered bar chart comparing what organisations respondents have been in contact since receiving the service in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

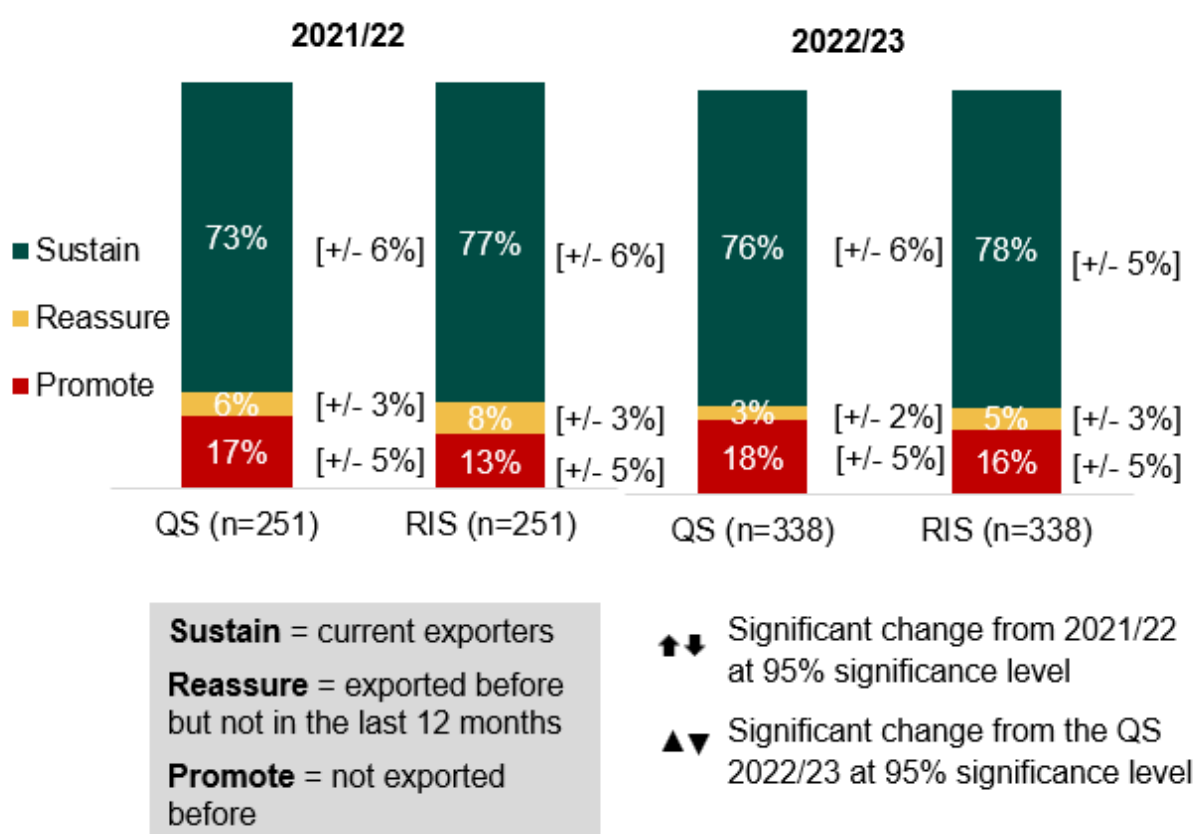
4.4.4 Reported impact on exporting

Businesses that used Export Academy were asked about their export status, both at the time they accessed the Export Academy service in the Quality Survey, and their export status 12 months later in the RIS (Chart 4.4.6). Responses from the 2 surveys were analysed to see whether the export status of these businesses has changed over this period. DBT 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 (76%) that used Export Academy fell into this segment at the time of the service delivery (QS 2022/23). This remained similar in the RIS 12 months later (78%).

- **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. Among Export Academy users, 3% fell into this segment at the time of the service delivery (QS 2022/23), and this was similar 12 months later (5%).
- **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 1 in 5 (18%) that used Export Academy were in this segment at the time of the service delivery (QS 2022/23). This remained in line in the RIS 12 months later (16%).

Chart 4.4.6 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Export Academy



Caption: Source: Composite measure merging data from several variables.
 Base: All businesses that used Export Academy and completed both surveys (Quality Survey: n=338 (2022/23), n=251 (2021/22); RIS: n=338 (2022/23), n=251 (2021/22))

Description: Stacked bar charts comparing the export status of respondents at the time of service delivery in 2022/23 to 2021/22, split between sustain, reassure and promote. The main findings were presented in the text preceding the chart.

The export status of some businesses changed between the time of the service delivery and 12 months later in the RIS (see Table 4.4.1).

Two thirds (67%) of businesses from the Reassure segment moved to Sustain, and 4% of businesses in the Sustain segment moved to Reassure.

Table 4.4.1 Change in export status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Export Academy

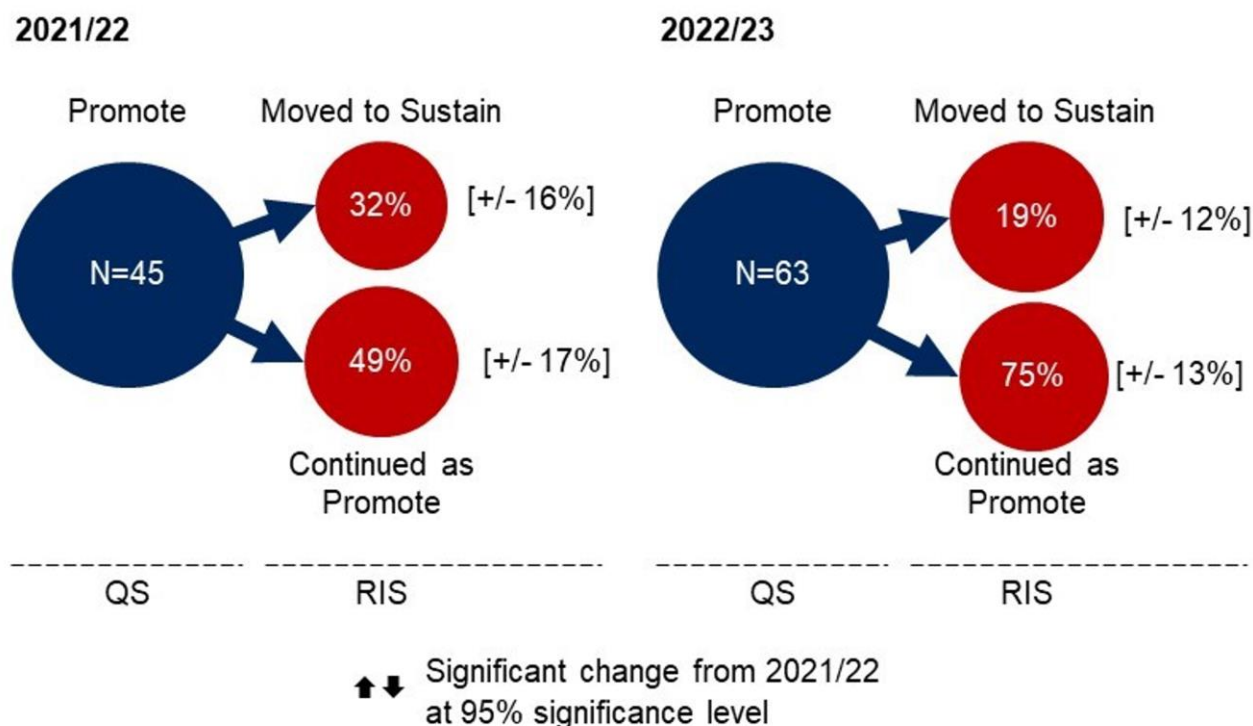
Quality Survey Export status	RIS Export status	Percentage	Change since 2021/22
Sustain (n=260)	Sustain	94% [+/- XX%]	-
	Reassure	4% [+/- XX%]	-
	Promote		-
		***% [+/- XX%]	
Promote (n=63*)	Sustain	19% [+/- 14%]	-
	Reassure	***% [+/- XX%]	-
	Promote	75% [+/- 14%]	-

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; **Very small base size. *** redacted due to small base size.

Considering businesses that were in the Promote segment (never exported) at the time of the Quality Survey (63 businesses), 75% remained in Promote, while 19% moved to Sustain (exported in the last 12 months) (Chart 4.4.7). On the other hand, considering businesses that were in the Sustain segment at the time of the Quality Survey (260 businesses), 94% continued in Sustain, while 4% moved to Reassure.²⁴

²⁴ Of the businesses that were in the Sustain segment at the time of the Quality Survey, 1% moved to Promote. This movement is likely to be caused by respondent error.

Chart 4.4.7 Exporter status reported at time of the service delivery (Quality Survey) and 12 months later (RIS) [rebased] – Export Academy



Caption: Source: Composite measure merging data from several variables.
Base: All businesses that used Export Academy who were in the Promote segment in the Quality Survey: n=63 (2022/23), n=45 (2021/22)

Description: Two charts showing the proportion of respondents who moved from 'Promote' status in the QS to 'Sustain' or 'Promote' in the RIS. One chart is for 2021/22 and the other is for 2022/23. The main findings were presented in the text preceding the chart.

4.4.5 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 Export Academy service (Chart 4.4.8). Businesses were asked to think about all contracts, not just those assisted by Export Academy or DBT.

Of the 267 businesses that were exporting or had exported in the previous 12 months, 79% 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.

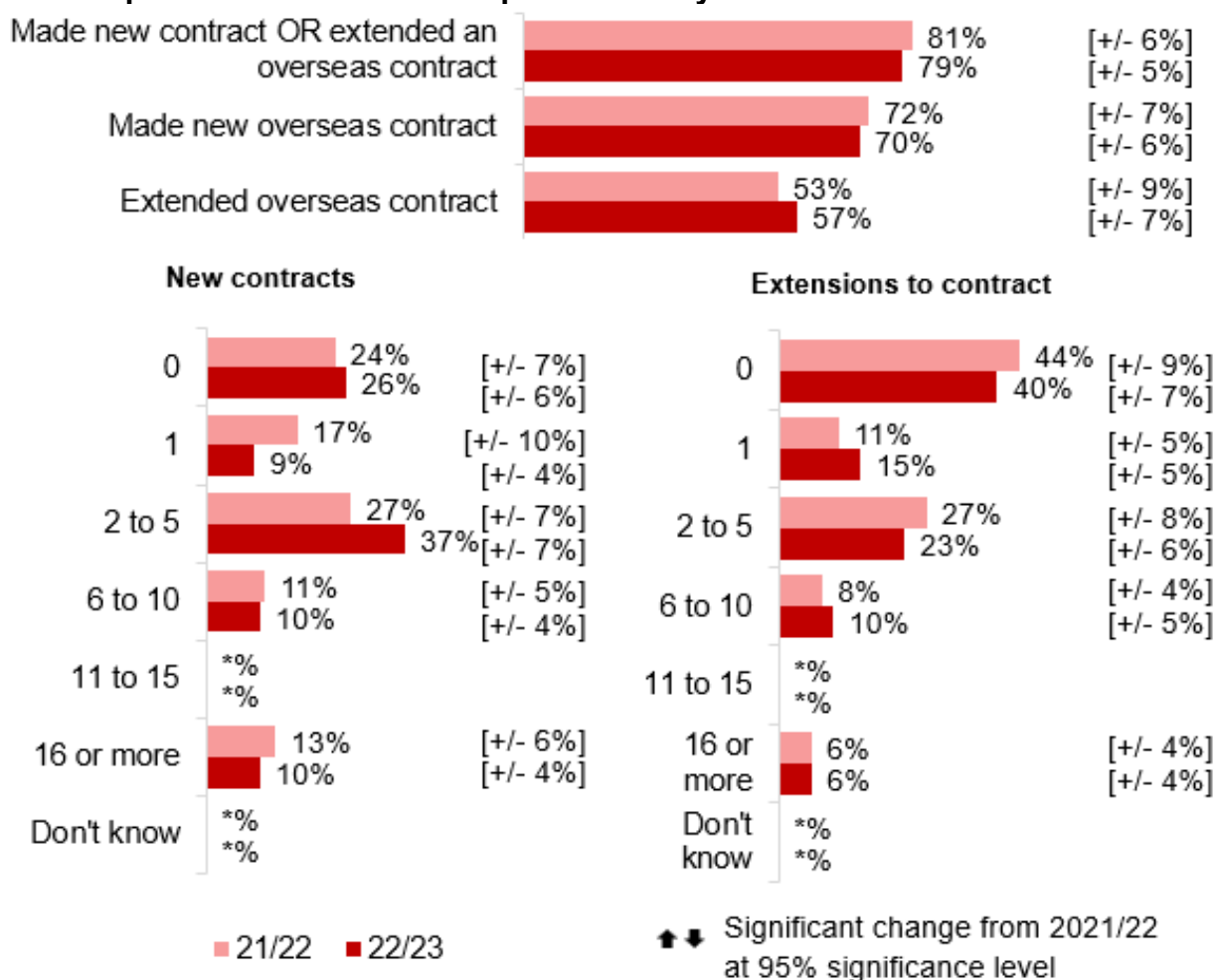
7 in 10 (70%) of businesses that were exporting or had exported in the previous 12 months had won new overseas business contracts in the year since they used the service (Chart 4.4.8). Specifically, 9% had won one overseas contract, and over a third (37%) had won between two and five overseas contracts. 1 in 10 (10%) businesses had won 16 or more

overseas contracts (Chart 4.4.8). The median number of contracts won among exporting businesses that had used Export Academy was two.²⁵

More than half (57%) of exporting businesses that used the Export Academy reported they had gained extensions to existing overseas business contracts in the year since they used the service, with 15% extending one contract, a quarter (23%) extending between two and five contracts, and 6% extending 16 or more contracts. Four in ten (40%) businesses had not extended any existing contracts (Chart 4.4.8). The median number of contracts extended (including those that did not extend any) was zero.

These results were in line with the previous year.

Chart 4.4.8 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 – Export Academy²⁶



Caption: QNewcontract: How many new overseas business contracts for export sales did you win in the past year?

²⁵ This is taken from the 80% 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.

²⁶ The total percentage of all responses for this question may not sum to 100% due to rounding.

QExtendcontract: How many extensions to existing overseas business contracts for export sales did you win in the past year?

Base: All businesses that used Export Academy and were currently selling, or had previously sold goods or services overseas in the previous 12 months (n=267 (2022/23), n=197 (2021/22)); All businesses that used Export Academy and were currently selling, or had previously sold goods or services overseas in the previous 12 months, and that answered how many new business contracts were won in the past year (n=263 (2022/23), n=194 (2021/22)). * Redacted due to small base size

Description: A set of clustered bar charts comparing data between 2021/22 and 2022/23. One compares the proportion that made or extended overseas contracts, the second compares the proportion of numbers of new contracts, and the last compares the proportion of numbers of extensions to contracts. The main findings were presented in the text preceding the chart.

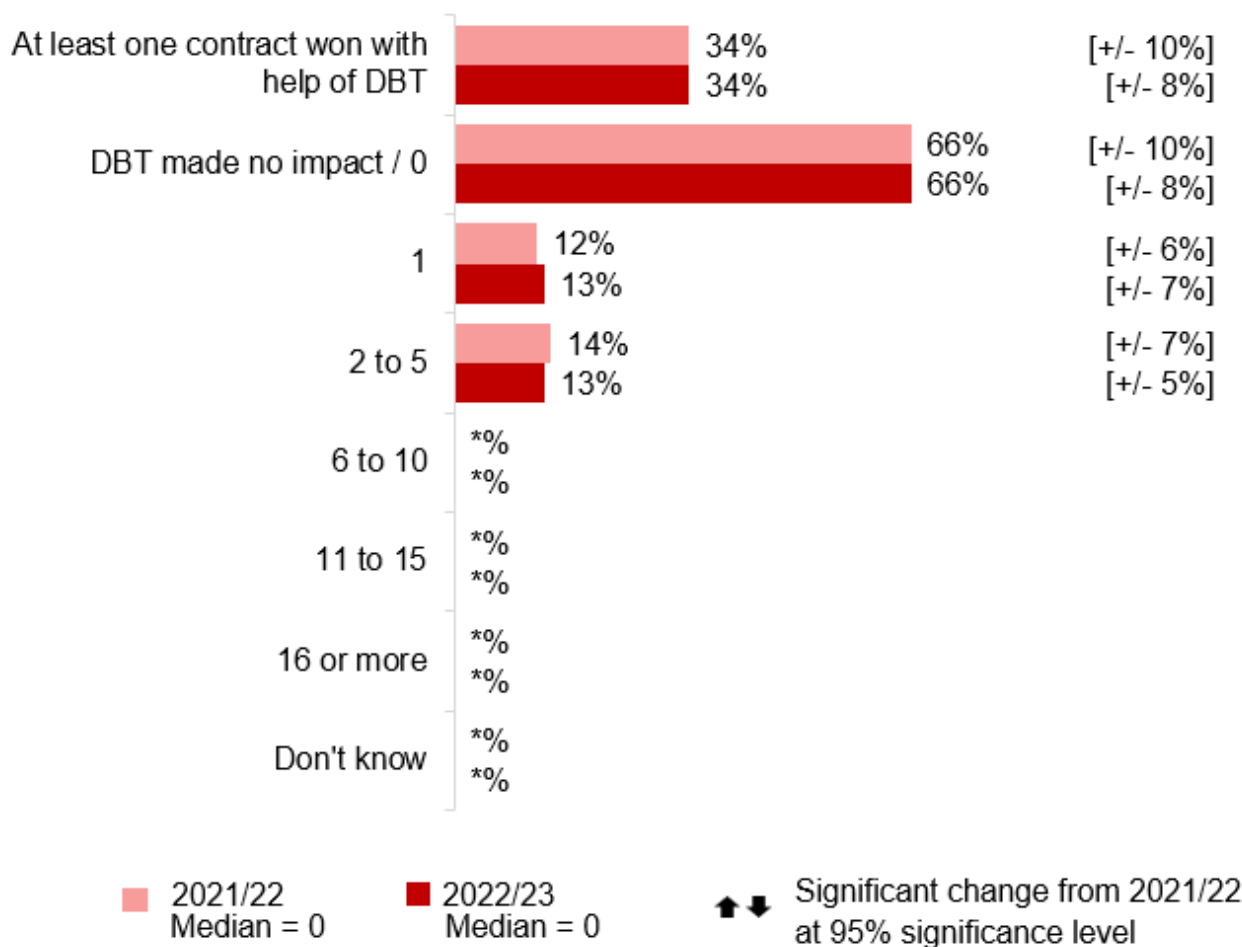
Reported additional contracts which were gained because of DBT support

Businesses that exported and that had won at least one new contract in the 12 months since the delivery of the Export Academy service were asked whether they could estimate the number of contracts won with the assistance of Export Academy or DBT (Chart 4.4.9). In total, 192 businesses (that is 57% of the businesses that were interviewed overall) felt able to provide an estimate and were surveyed about their experiences.

As shown in Chart 4.4.9 below, 2 in 3 of these businesses (66%) said they won no new overseas sales contracts with the help of DBT, or using DBT services made no impact. Around 1 in 8 (13%) had won one new overseas contract, and the same proportion (13%) had won between 2 and 5 contracts. The median number of contracts that DBT helped win was zero²⁷, for current exporters that used Export Academy. These results were in line with the previous year.

²⁷ This includes businesses that reported the Export Academy service did not help them to win any contracts.

Chart 4.4.9 Number of new overseas contracts said to be won with the help of DBT in the last 12 months (including those who said DBT made no impact) – Export Academy



Caption: QContractDBT: 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 DBT?

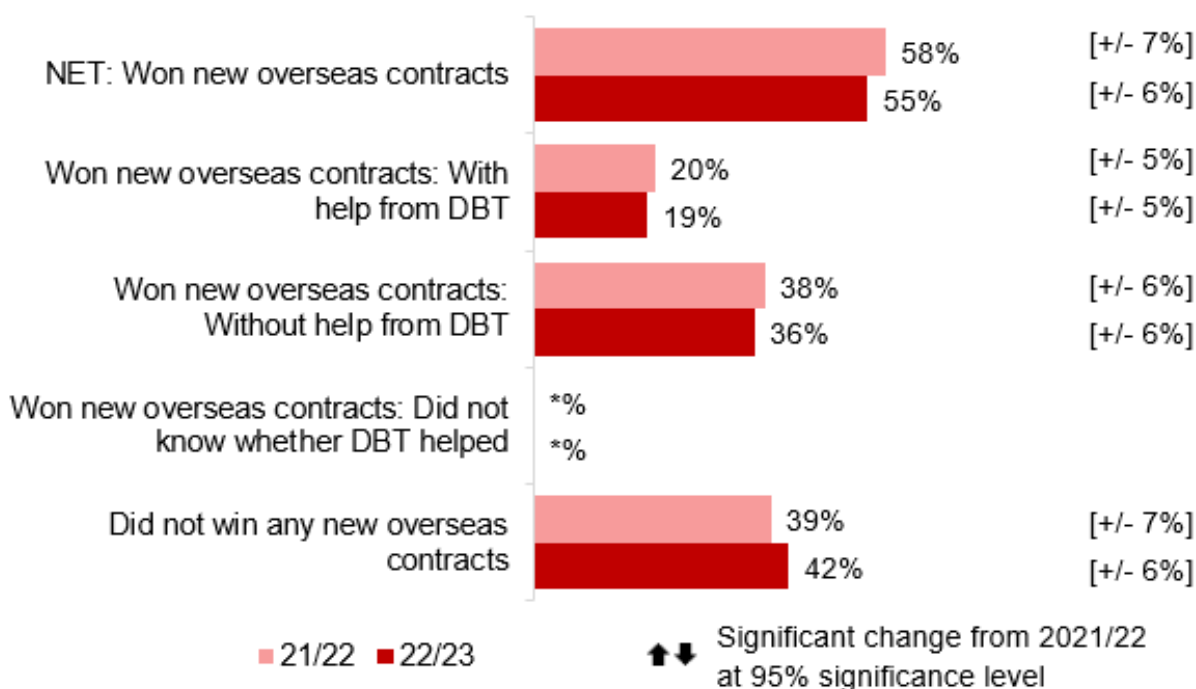
QContractNumber: How many new overseas contracts were won with help from DBT?

Base: All businesses that used Export Academy and were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (n=192 (2022/23), n=138 (2021/22)). Median values include zero. * Redacted due to small base size

Description: Clustered bar chart comparing the number of new overseas contracts said to be won with the help of DBT in the last 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DBT (Chart 4.4.10). Among all businesses that had used Export Academy, 55% said they had won new overseas contracts (either with help from DBT, without help from DBT, or were unsure whether DBT helped). More specifically, we estimate that 19% of Export Academy respondents had won contracts with help from DBT, while 36% of Export Academy respondents said they had won contracts without help from DBT. These results were in line with the previous year.

Chart 4.4.10 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 DBT support – Export Academy



Caption: Source: Composite measure merging data from several variables.
 Base: All businesses that used Export Academy (n=338 (2022/23), n=251 (2021/22)). * Redacted due to small base size

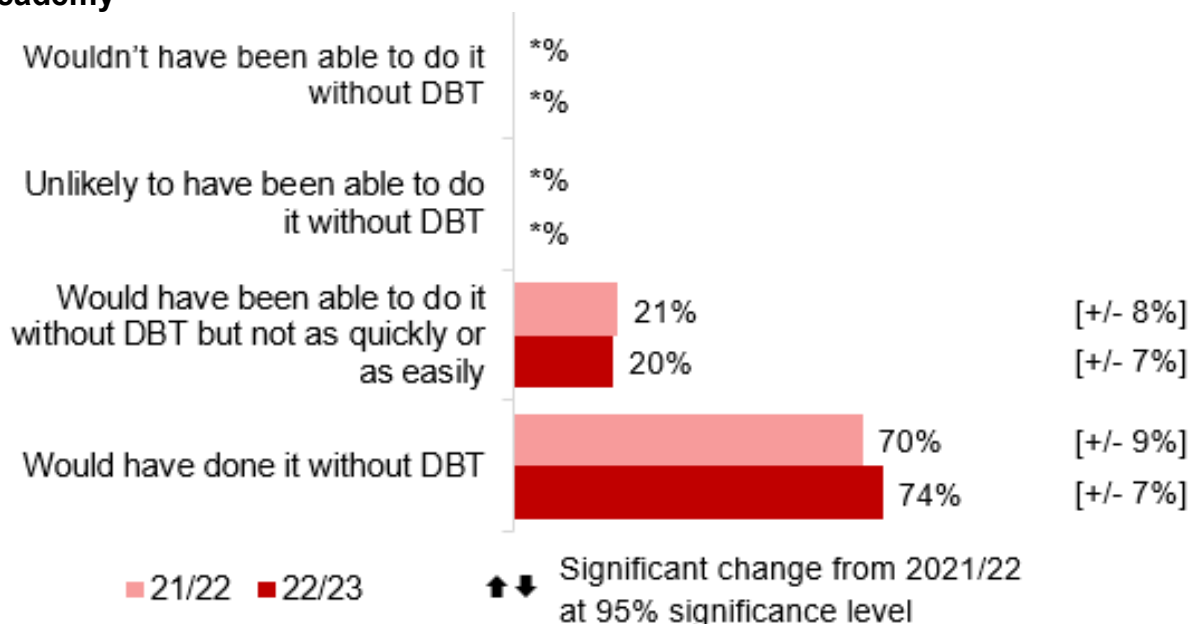
Description: Clustered bar chart comparing the proportion of businesses reported or estimated to have won or not won new overseas contracts with or without DBT support in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Importance of DBT's support in winning overseas contracts

The survey explored views on the importance of DBT'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 DBT in the last 12 months, since the delivery of the Export Academy service. Exporting businesses who said that DBT 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 DBT' to better understand the level of support that the Export Academy service provided.

Around a quarter of these businesses (26%) reported that DBT support was important in helping them win these contracts to some extent. 1 in 5 (20%) thought they would not have been able to do it as quickly or easily without DBT support (Chart 4.4.11). The remaining 74% thought they would have been able to achieve the same outcome without DBT support. These results were in line with the previous year.

Chart 4.4.11 How important DBT's help was in winning overseas contracts – Export Academy



Caption: QContractHelp: How important was DBT's help in winning these overseas contracts?

Base: All businesses that used Export Academy and won any new overseas contracts in the past year (n=192 (2022/23), n=138 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing how important DBT's help was in winning overseas contracts in 2021/22 to 2020/21. The main findings were presented in the text preceding the chart.

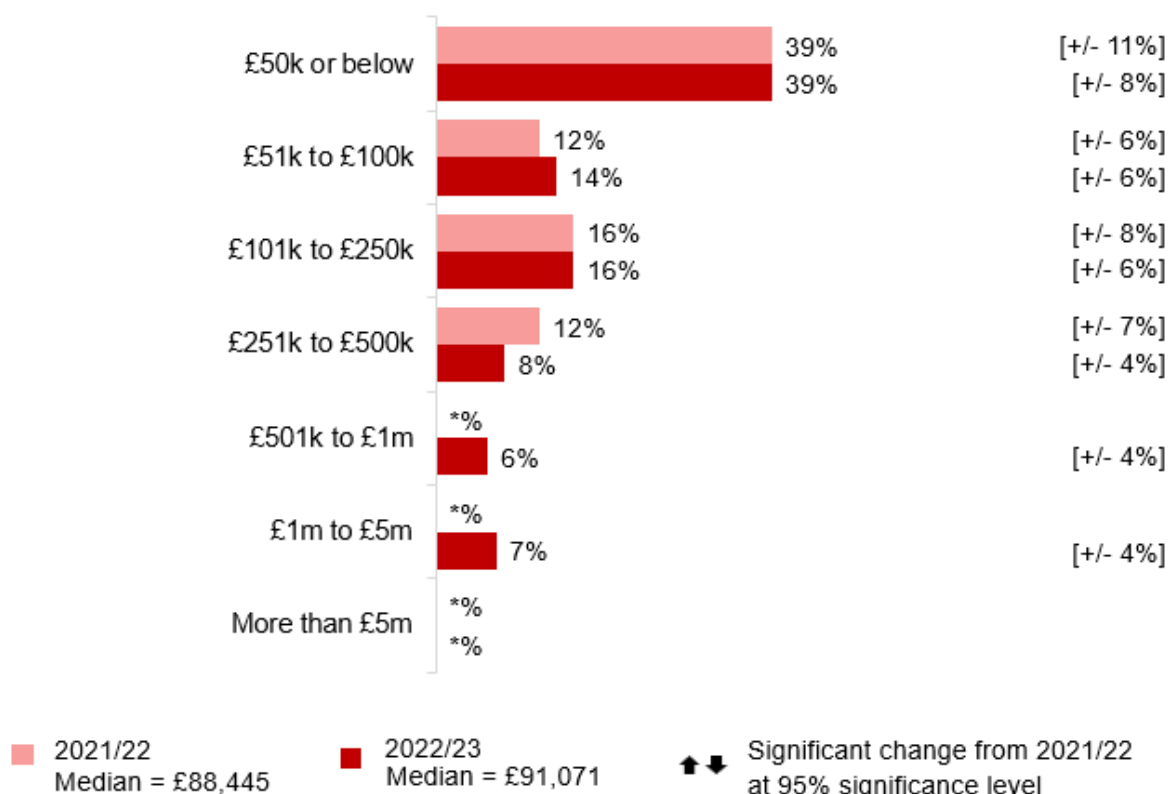
4.4.6 Reported value of export sales achieved since receiving the service

Reported value of the export sales of new contracts

The 55% 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 4.4.12). The median value of the export sales of all new overseas contracts for these businesses was £91,071 (compared to £88,445 in the RIS 2021/22).²⁸ Two fifths (39%) had won contracts with an export sales value of £50,000 or below, while 9% said that the export sales value of the new overseas contracts won was more than £1 million. These results were in line with the previous year.

²⁸ Values are not adjusted for inflation when comparing to 2021/22.

Chart 4.4.12 Value of all new overseas contracts made in previous 12 months – Export Academy



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

Base: All businesses that used Export Academy and won any new overseas business contracts (n=192 (2022/23), n=138 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing the value of all new overseas contracts made in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Reported additional value of DBT support

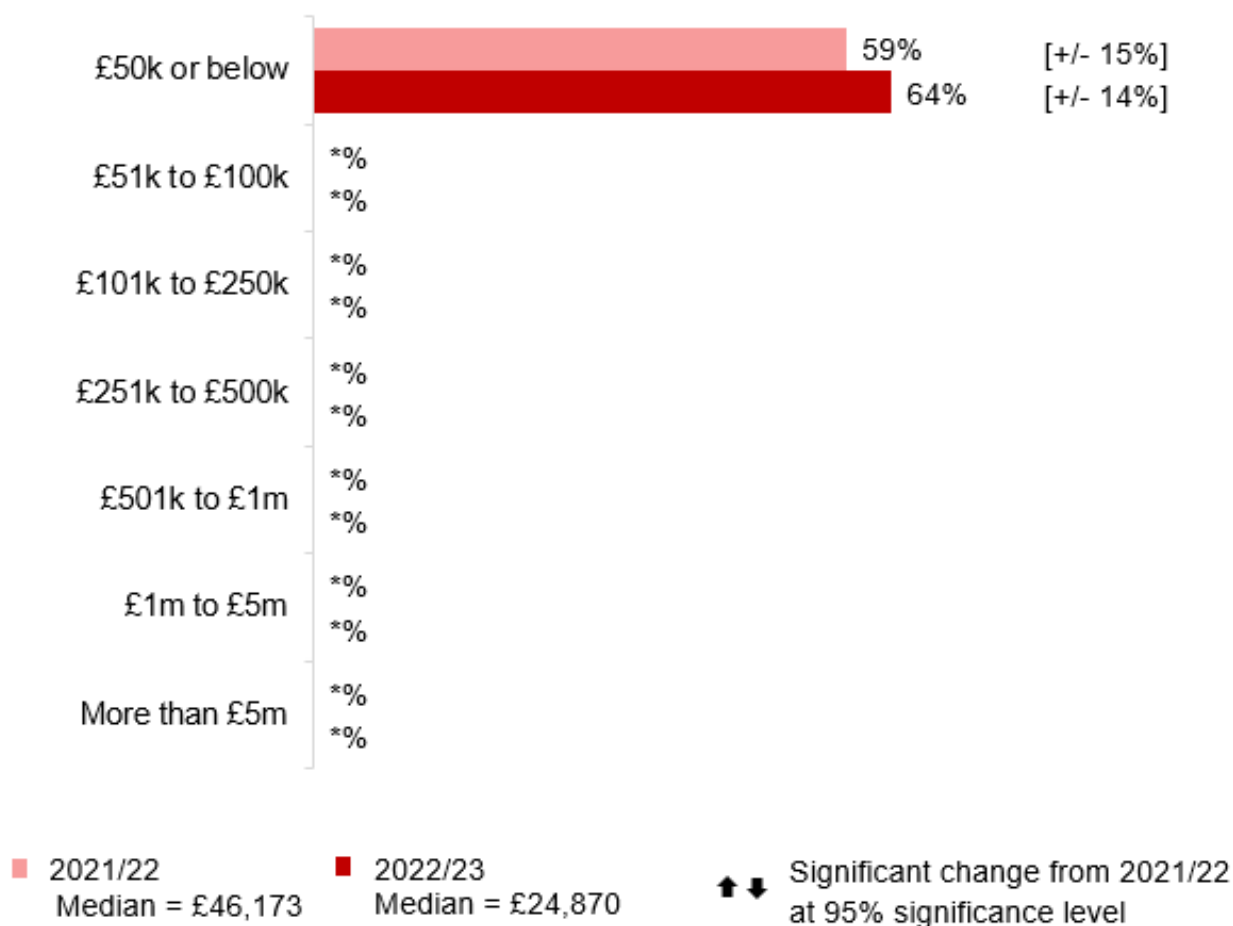
This section considers the value of DBT support to businesses. If businesses were not able to estimate the impact of the Export Academy service, they were asked to think about the impact from all of their interactions with DBT. The analysis in this section measures the additional contribution that DBT 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 DBT support (Chart 4.4.13). This data was used to estimate the 'reported additional export sales' – that is, the reported additional impact of using DBT services on export sales. The reported additional export sales for Export Academy were £24,870, across all the contracts that Export Academy helped businesses to win (compared to £46,173 in the RIS 2021/22). Note that this does not include businesses that

did not win any new export contracts, or businesses that said DBT made no impact on overseas contract wins.

Around two thirds (64%) reported additional export sales of £50,000 or below, (Chart 4.4.13).

Chart 4.4.13 Value of new overseas contracts helped by DBT support in previous 12 months – Export Academy



Caption: QContractValueDBT: What was the value of these new overseas business contracts that your business won with the help of support from the service or DBT last year?

Base: All businesses that used Export Academy and won any new overseas business contracts with the help of DBT (n=60 (2022/23), n=48 (2021/22)). * Redacted due to small base size

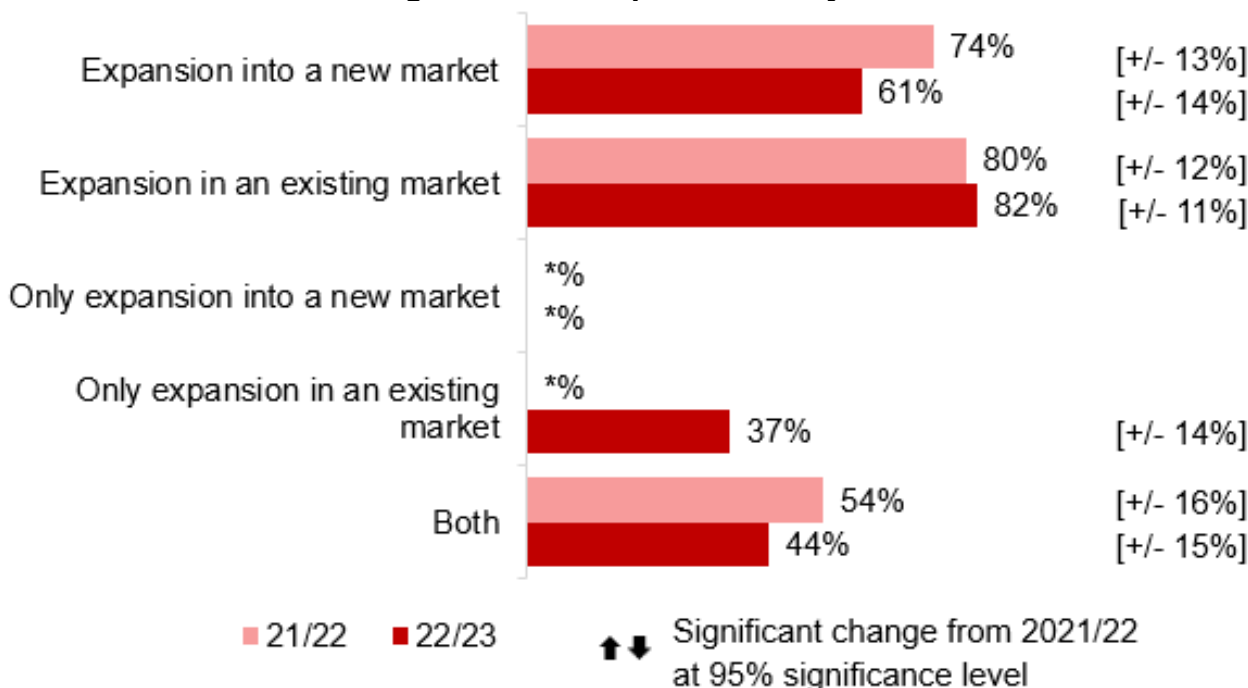
Description: Clustered bar chart comparing the value of all new overseas contracts made with DBT support in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

4.4.7 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 (Chart 4.4.14). This question was asked to businesses that said DBT support helped them to win new overseas contracts and were able to provide details of the number and value of these contracts.

3 in 5 businesses (61%) said they were assisted with expansion into a new market and around four-fifths (82%) said they were assisted with expansion within an existing market. This includes 17% who said that DBT helped them expand into new markets (but not existing markets), and 37% expanded within an existing market (but not into new markets). More than 2 in 5 (44%) reported that DBT helped them expand into both existing and new markets. These results were in line with the previous year.

Chart 4.4.14 Whether new contracts won with DBT's help represented expansion into new markets or existing markets – Export Academy



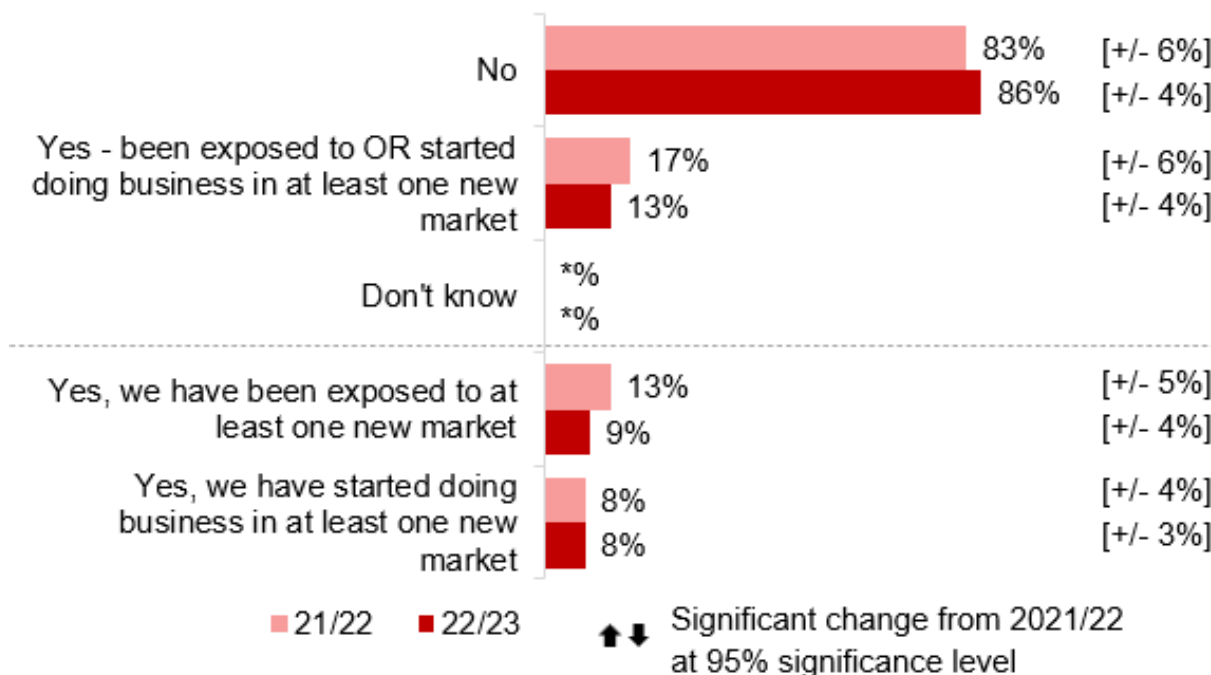
Caption: QContractRepresent: Did these new overseas contracts represent ...?
 Base: All businesses that used Export Academy and won any new overseas business contracts with the help of DBT (n=59 (2022/23), n=48 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing whether new contracts won with DBT help represented expansion into new or existing markets in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

All businesses that used Export Academy were asked whether they had increased their exposure or started doing business in any new markets because of using the Export Academy service²⁹ (Chart 4.4.15). More than four-fifths (86%) of businesses said they had not, while 9% said they had been exposed to at least one new market and 8% said they had started doing business in at least one new market as a result of using the Export Academy service. These results were in line with the previous year.

²⁹ 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 4.4.15 Whether increased exposure or starting business in a new overseas market – Export Academy



Caption: QGrowthDBT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?

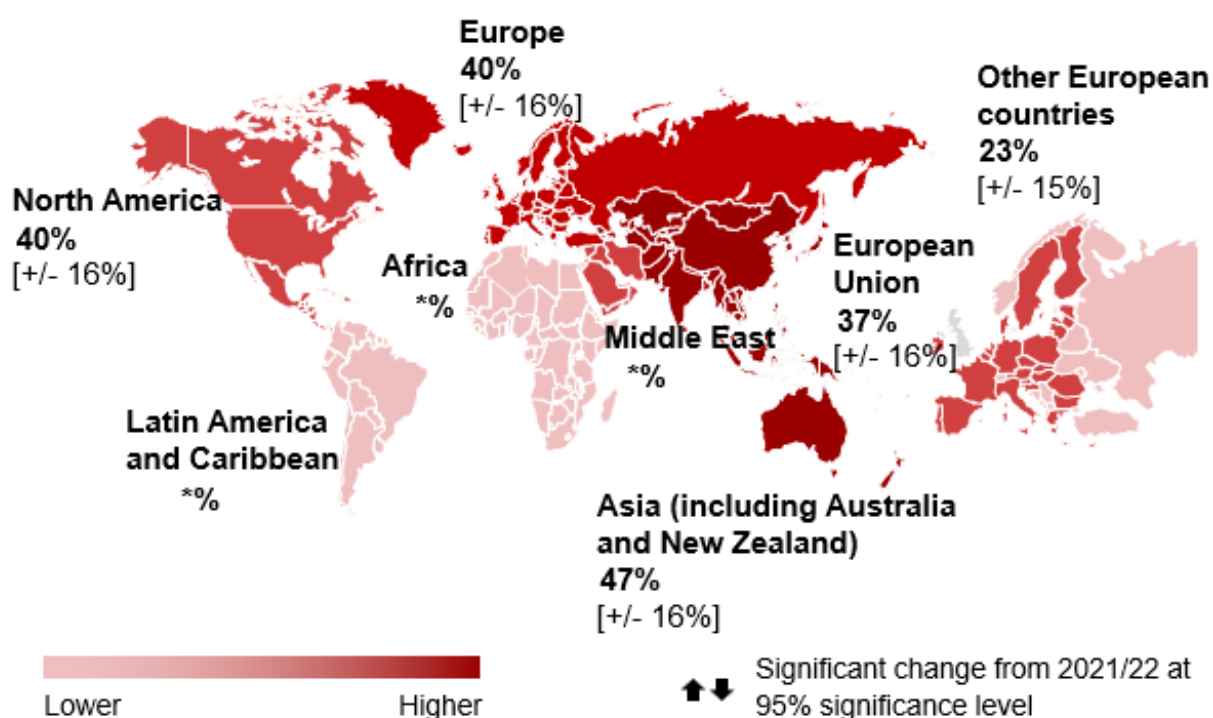
Base: All businesses that used Export Academy (n=338 (2022/23), n=251 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing whether increased exposure or starting business in a new overseas market in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

The most common new market for increased exposure or business was Asia (including Australia and New Zealand) (47%), followed by Europe and North America (both 40%). This can be seen below in Chart 4.4.16 and Table 4.4.2. Looking in more detail at Europe, more than a third (37%) reported that their increased exposure or new business was within the European Union, while 23% had new or increased exposure in other European countries.

Compared to the RIS 2021/22, Asia replaced Europe as the most common new market for increased exposure or business. Otherwise, results were in line with the previous year.

Chart 4.4.16 The new markets that the organisations have started doing business in or been exposed to – Export Academy



Caption: QNewRegion: Which of the following new markets has your business started doing business in or been exposed to?

Base: All businesses that used Export Academy and have had increased exposure to, or started doing business in at least one new market (n=45 (2022/23), n=41 (2021/22)). *

Redacted due to small base size

Description: A map of the world. Regions that businesses have done more business in or are more exposed to are shown as darker. The main findings were presented in the text preceding the chart.

Table 4.4.2 The new markets that the organisations have started doing business in or been exposed to – Export Academy

Region	2021/22	CI (+/-)	2022/23	CI (+/-)	Change
Europe	52%	17%	40%	16%	-
European Union	52%	17%	37%	16%	-
Other European countries	**%	11%	23%	15%	-
Asia (including Australia and New Zealand)	31%	16%	47%	16%	-
Middle East	**%	14%	**%	11%	-
North America	**%	14%	40%	16%	-
Africa	**%	14%	**%	11%	-
Latin America and the Caribbean	**%	14%	**%	7%	-
Base	41*		45*		

*Small base size. ** redacted due to small base size

4.4.8 Barriers to exporting

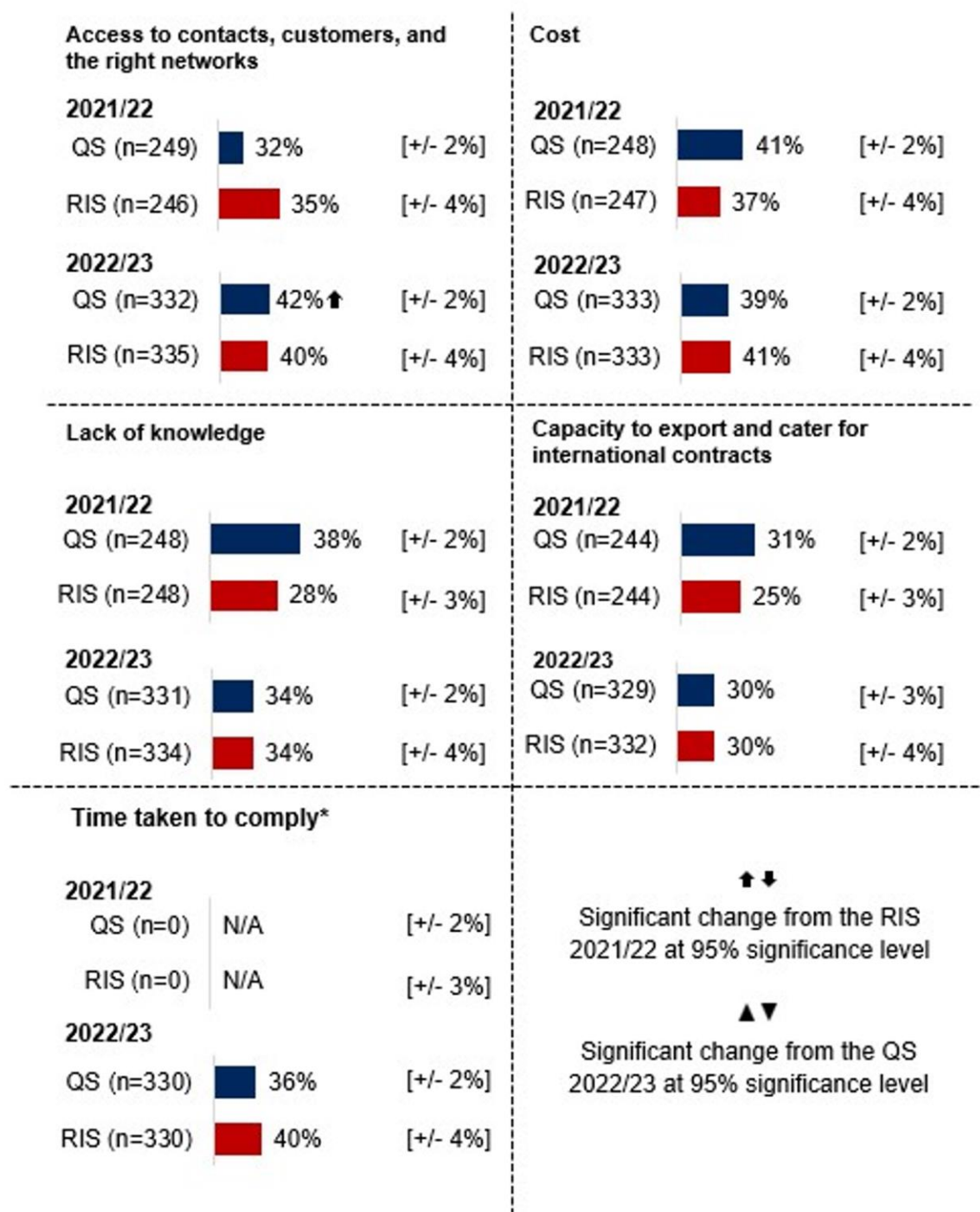
Businesses were asked in both the Quality Survey and Reported Impact Survey about 5 **potential barriers for their business in relation to exporting**; specifically, how much of a barrier they considered each one was for their business, using a scale from 10 (very strong barrier) to 0 (not a barrier at all)³⁰.

The top barriers in the RIS 2022/23 were 'cost' (41%), 'access to contacts' (40%) and 'time taken to comply' (40%).

Results were consistent with the previous year (RIS 2021/22) and the QS 2022/23.

³⁰ 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 4.4.17 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – Export Academy³¹



Caption: 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.

³¹ 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.

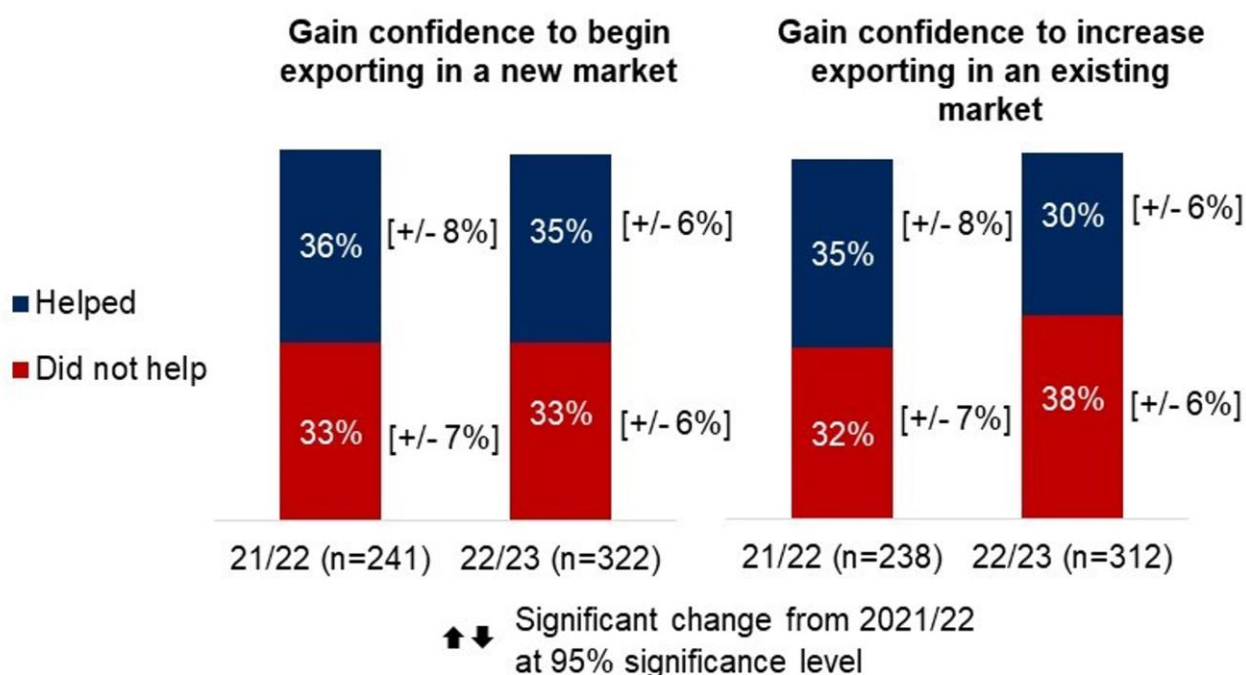
Base: All businesses that used the service not including those who gave a 'not applicable' answer. *Code amended or added in 2022/23

Description: A set of horizontal bar charts comparing the proportion of QS and RIS respondents encountered barriers. The barriers include access to contacts, customers and the right networks, cost, lack of knowledge, capacity to export and cater for international contracts and time taken to comply.

4.4.9 Wider benefits of the service

Businesses were asked to think about the extent to which using the Export Academy service had **given them confidence** to begin exporting in a new market or increase exporting in an existing market (Chart 4.4.18). Around a third of businesses reported that using the Export Academy service had helped them gain confidence to begin exporting in a new market (35%) or to increase exporting in an existing market (30%). However, similar proportions reported that using the Export Academy service had not helped them gain confidence to begin exporting in a new market (33%) or to increase exporting in an existing market (38%). These results were in line with the previous year.

Chart 4.4.18 To what extent using the Export Academy service helped to build confidence to export – Export Academy



Caption: 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 the service help you to ...? Helped (7-10), Neutral (4-6), Did not help (0-3).

Base: All businesses that used the service not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

Description: Stacked bar chart comparing confidence in exporting between QS and RIS in 2021/22 and 2022/23. The main findings were presented in the text preceding the chart.

Businesses were asked to think about the extent to which the service had **helped them improve their knowledge**.³² Chart 4.4.19 shows how businesses rated the impact of using the Export Academy service on their knowledge.

More than a third (36%) of businesses said that the service **helped to improve their knowledge of the exporting process**, such as standards, licensing, customs, and tariffs; while a third (34%) of businesses that had used Export Academy said the service did not help them in this way. The proportion that said the service did not help them was higher than the previous year (25%).

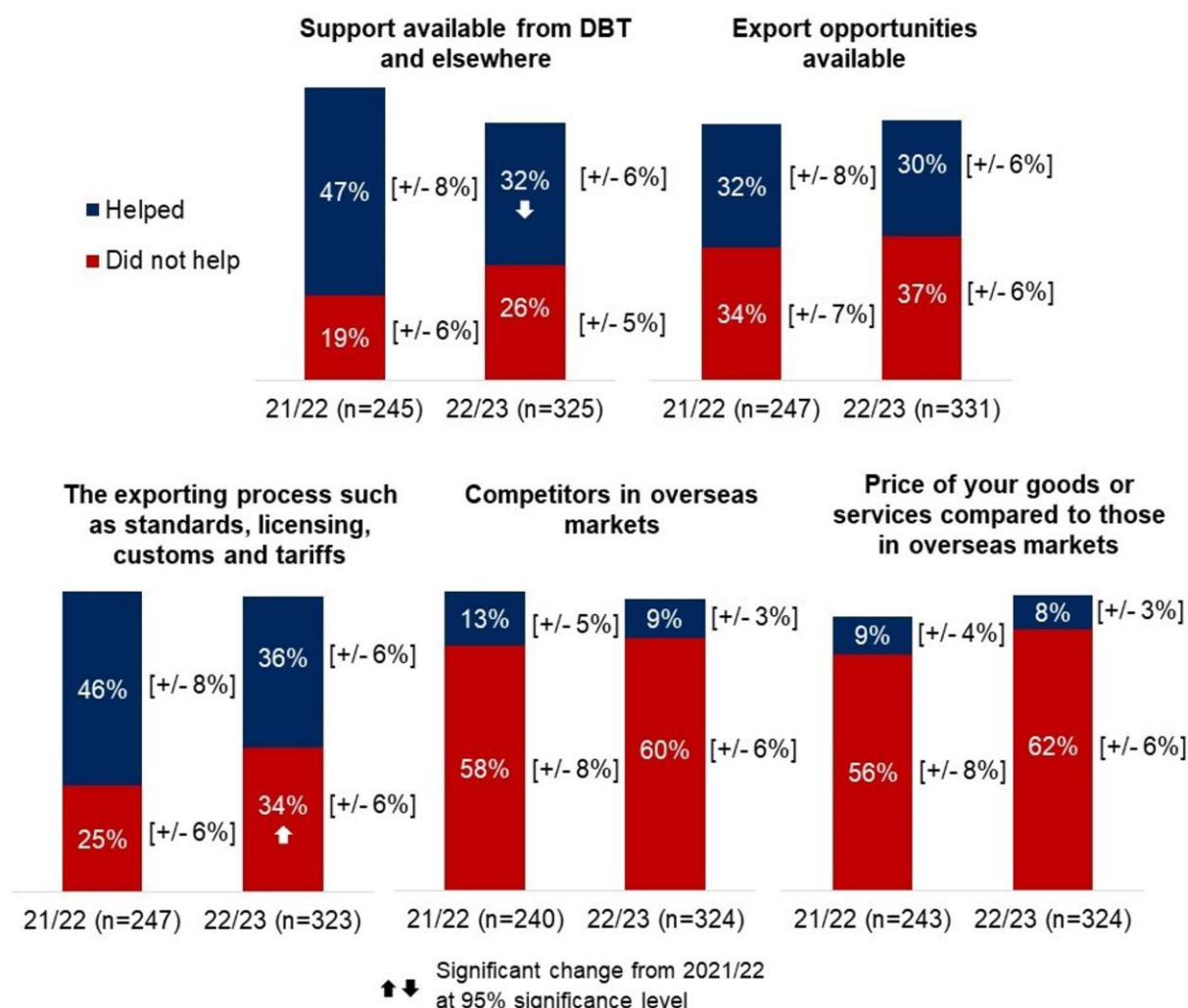
Around a third of businesses (32%) reported that using the Export Academy service was **helpful for increasing their knowledge of support available to them (from DBT and elsewhere)**. This represents a significant decrease from the previous year, when almost half (47%) felt that the service helped them in this way. A quarter (26%) said it did not help them do this.

On balance, more businesses reported that using the Export Academy service was **not helpful for increasing their knowledge of export opportunities available**. More than a third of businesses that had used Export Academy (37%) said that the service had not helped them to increase their knowledge of the export opportunities available. However, three in ten businesses (30%) said they were helped in this way. These results were in line with the previous year.

Only small proportions said that using Export Academy improved their knowledge about their **competitors in overseas markets** (9%) or of **price of goods** compared with those in overseas markets (8%). These results were in line with the previous year.

³² Businesses were asked to rate these factors on a scale from 10 (helped a lot) to 0 (did not help at all).

Chart 4.4.19 To what extent the business felt that their knowledge has improved as a result of using the service – Export Academy



Caption: QImproveKnowledge: Using the same scale, to what extent do you feel that your business improved its knowledge of the following as a result of the service? Helped (7-10), Neutral (4-6), Did not help (0-3).

Base: All businesses that used the service not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown

Description: Five stacked bar chart comparing the extent to which businesses felt their knowledge had improved as a result of using the service, between QS and RIS in 2021/22 and 2022/23. The main findings were presented in the text preceding the chart.

Businesses were asked about other ways they had benefitted from using Export Academy in the year between dealing with the Export Academy and taking part in the RIS 2022/2023.³³ A detailed breakdown of responses is shown in Chart 4.4.20.

³³ Respondents were asked to select from a pre-coded list and had the option to provide an 'other' answer

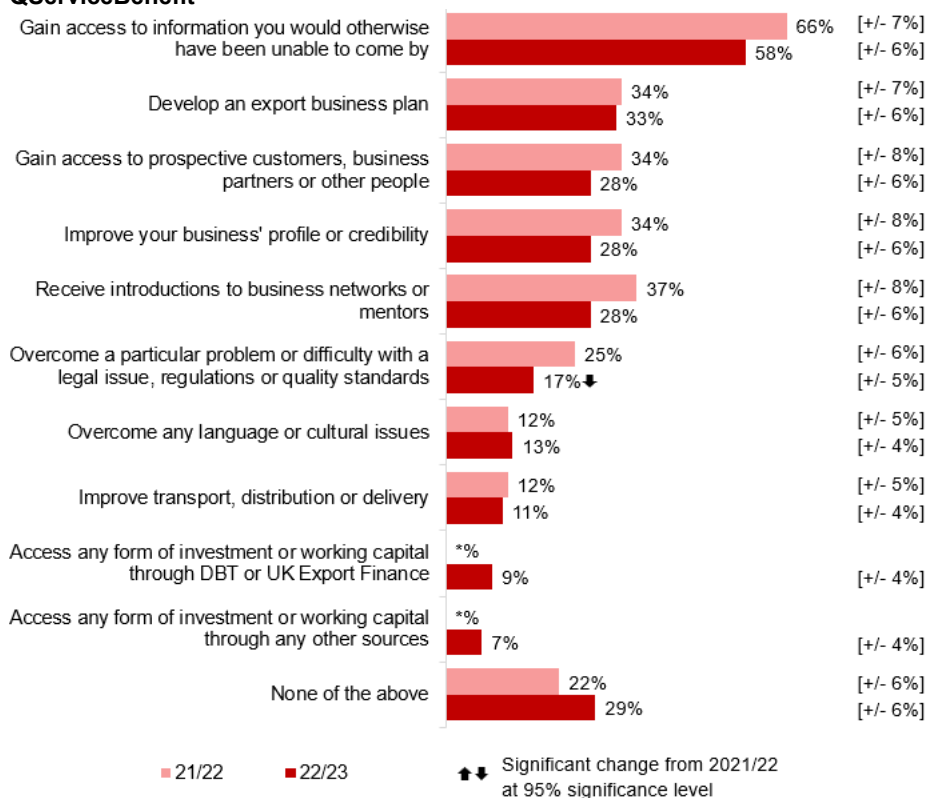
The top response was helping businesses to gain access to information that they would otherwise have been unable to come by (58%). 3 in 10 (29%) felt that using the Export Academy service had not helped them in any of the ways listed.

Businesses with a turnover of up to £500,000 were more likely than those with a higher turnover to say they had accessed any form of investment or working capital through sources other than DBT or UK Export Finance (10% compared with 1%).

Compared to the RIS 2021/22, there was a decrease in the proportion of businesses that said they overcame a particular problem or difficulty with a legal issue, regulations or quality standards, from 25% to 17%. There were no other significant changes compared to the RIS 2021/22.

Chart 4.4.20 In what ways has the business felt it had benefited from DBT support – Export Academy

QServiceBenefit



Caption: QServiceBenefit: in which of the following ways if any, has your business benefited specifically from the service over the last year?

Base: All businesses that used Export Academy (n=338 (2022/23), n=251 (2021/22)). * Redacted due to small base size

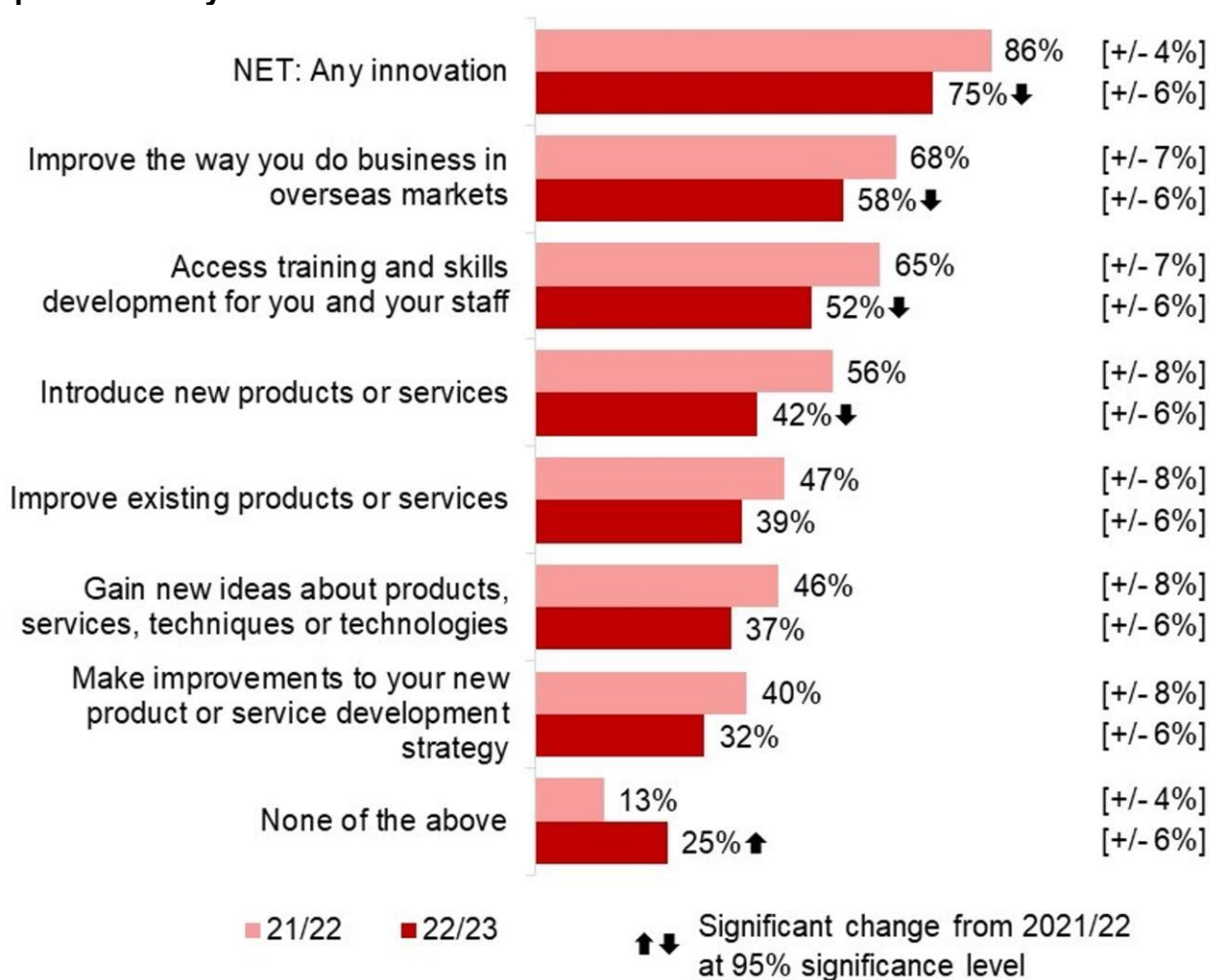
Description: Clustered bar chart comparing how businesses felt they had benefitted from DBT support in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

Businesses were asked whether using the Export Academy service had helped, or was likely to help, support innovation and/or development in their business (Chart 4.4.21). Three quarters (75%) said that using the service helped them with innovation or development in some form, which was lower than the previous year (86%). The most

frequent responses were: to improve the way they do business overseas (58%) and to access training and skills for themselves or their staff (52%).

Compared to the RIS 2021/22, fewer businesses said that the service helped them to improve the way they do business overseas (58%, down from 68% the previous year), access training and skills for themselves or their staff (52%, down from 65%) and introduce new products or services (42%, down from 56%).

Chart 4.4.21 Whether the service has / is likely to help innovation and development – Export Academy



Caption: QInnovationSupport: Has this service helped or do you expect it to help your business with development and/or innovation?

Base: All businesses that used Export Academy (n=338 (2022/23), n=251 (2021/22))

Description: Clustered bar chart comparing if businesses felt the service had been or is likely to help innovation and development in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

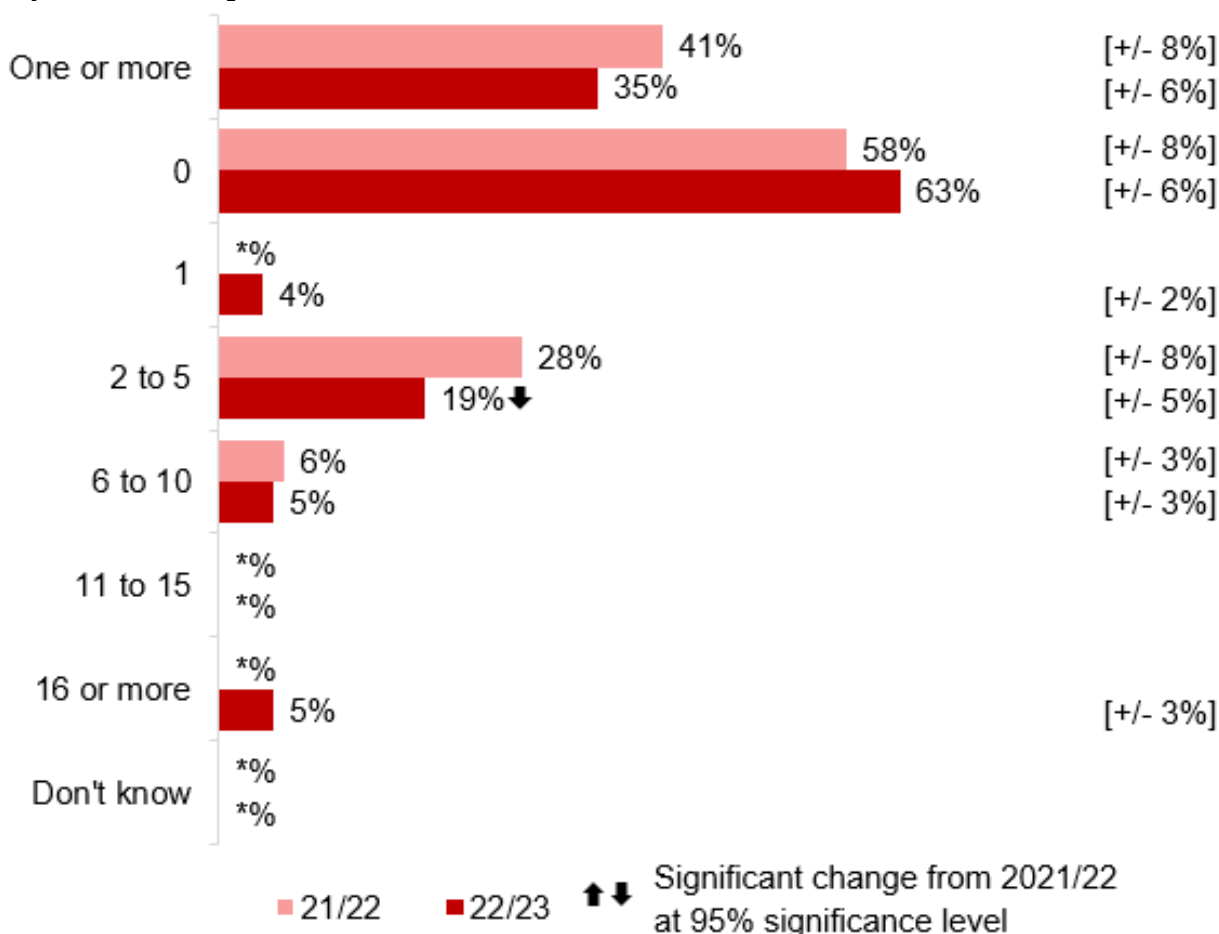
International contacts

Businesses were asked how many overseas contacts they had made as a result of using Export Academy over the past year (Chart 4.4.22). Around a third (35%) of businesses made at least one new overseas contact in the year since using the Export Academy service, with 1 in 5 (19%) making between 2 and 5 new contacts. Around three-fifths (63%) of businesses reported that they had not made any new contacts as a result of using the Export Academy service.

The average number of contacts made was 2.

Results were generally in line with the previous year, although a smaller proportion said that they had made between 2 and 5 new contacts (19% compared with 28% in the previous year).

Chart 4.4.22 Number of new overseas contacts made in previous 12 months – Export Academy



Caption: QContactsMade: How many new overseas contracts, if any, did your business make as a result of the service in the past year?

Base: All businesses that used Export Academy (n=338 (2022/23), n=251 (2021/22)). * Redacted due to small base size

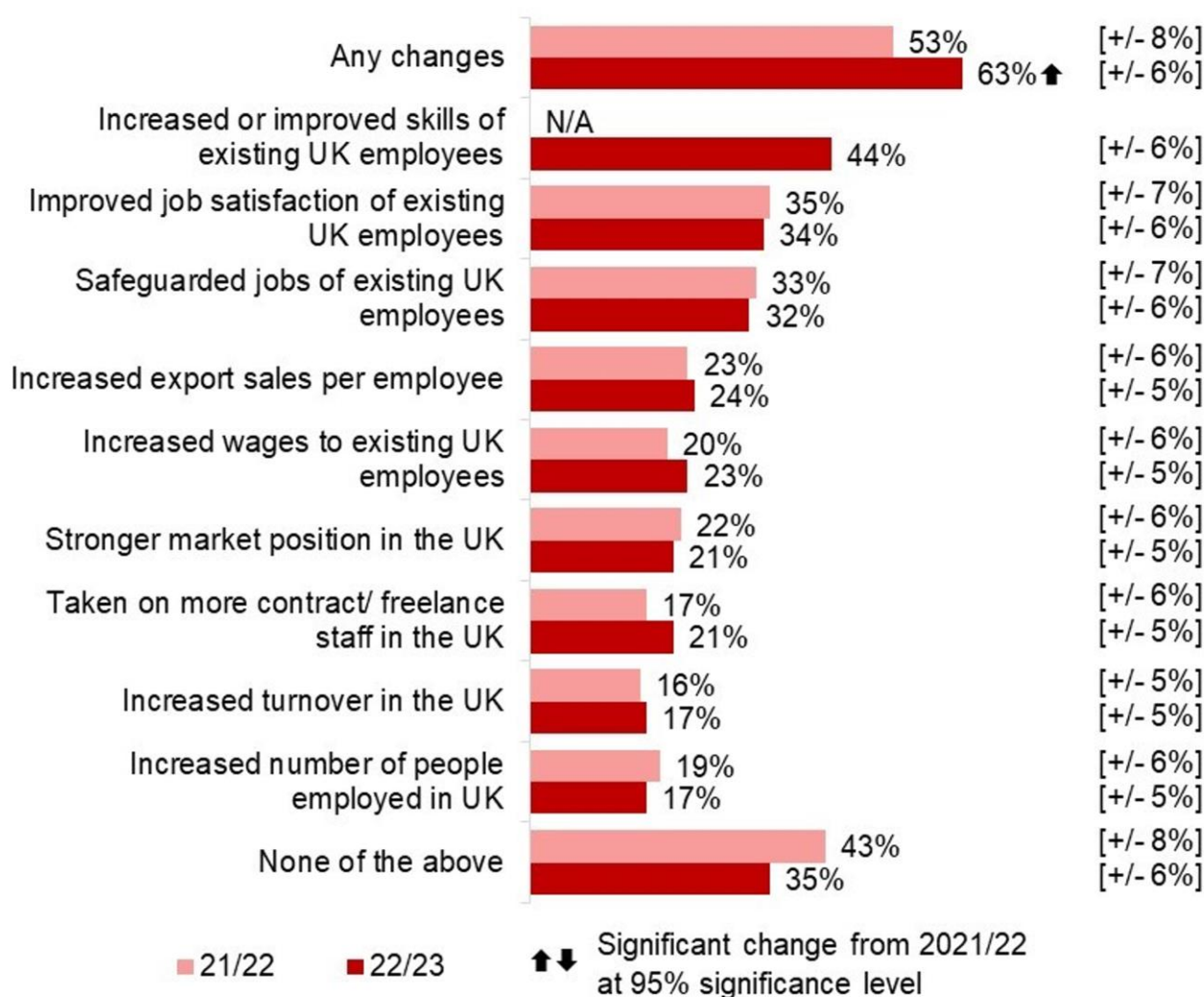
Description: Clustered bar chart comparing the number of new overseas contacts made in the previous 12 months in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Export Academy service (Chart 4.4.23). More than 2 in 5 businesses (44%) said they thought using the Export Academy service had, or would, increase or improve the skills of existing UK employees. Around a third said they thought using the Export Academy service had, or would, improve job satisfaction among existing UK employees (34%) or safeguard jobs in the UK (32%).

Overall, almost two thirds (63%) said they had seen, or expected to see, at least one type of change as a result of receiving the service. While this was higher than in the previous year (53%), this result should be treated with caution as a new option code was introduced in RIS 2022/23.

Businesses with a turnover of £500,000 or more were more likely than those with a lower turnover to say using the Export Academy service had, or would, safeguard jobs in the UK (40% compared with 24%). However, businesses with a turnover of up to £500,000 were more likely than those with a higher turnover to say they had taken on, or would take on, more contract or freelance staff in the UK (34% compared with 13%).

Chart 4.4.23 Changes expected / seen in the UK business as a result of receiving the service – Export Academy



Caption: QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service?

Base: All businesses that used Export Academy (n=338 (2022/23), n=251 (2021/22))

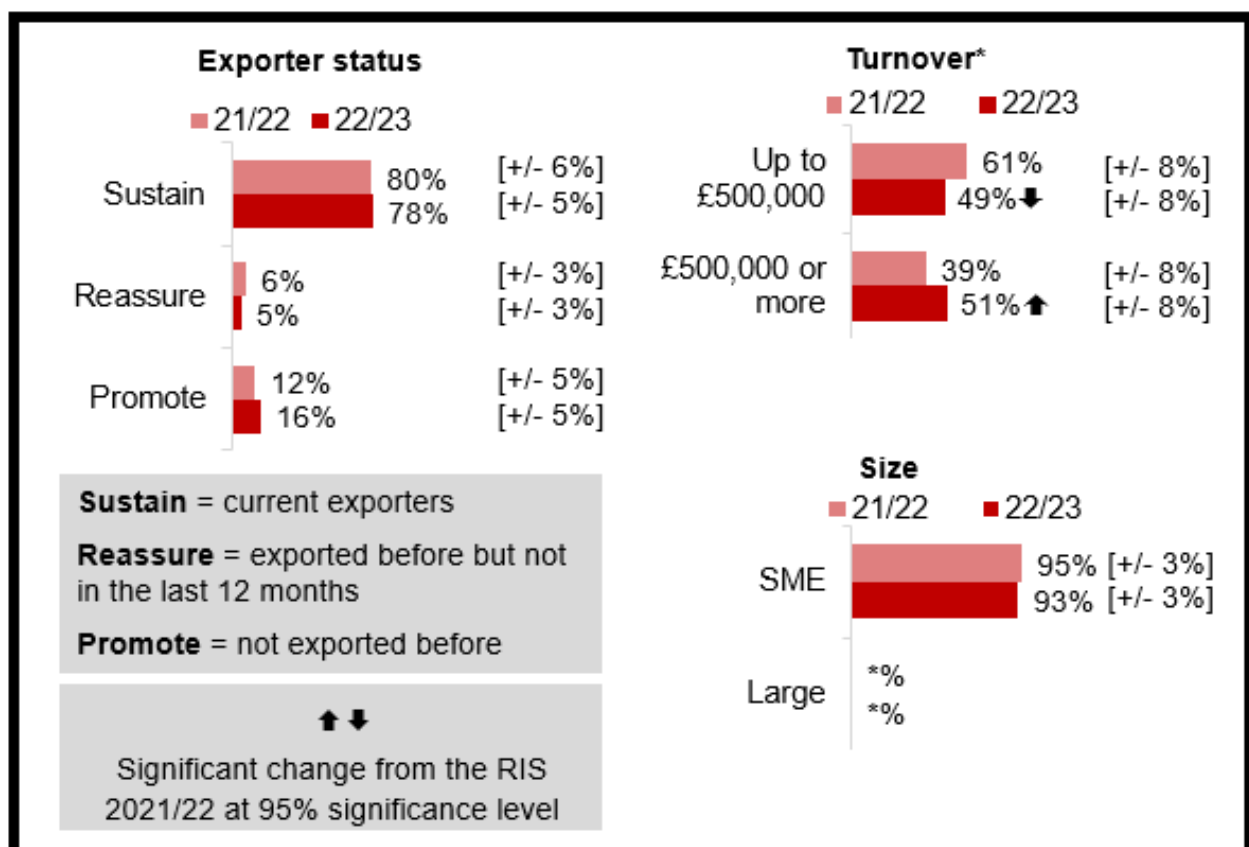
Description: Clustered bar chart comparing changes expected or seen in the business as a result of using the service in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

4.4.10 Profile of respondents

Looking at all businesses supported by Export Academy 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 three quarters (78%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months (Chart 4.4.24). There were no significant changes in exporter status since the previous year.

However, there was a change in turnover profile, with an increase in businesses with a turnover of £500,000 or more (51%, up from 39% in 2021/22), and a corresponding decrease in the proportion of businesses with a turnover of up to £500,000 or more (from 61% in 2021/22 to 49% in 2022/23). There was no change in business size profile since the previous year.

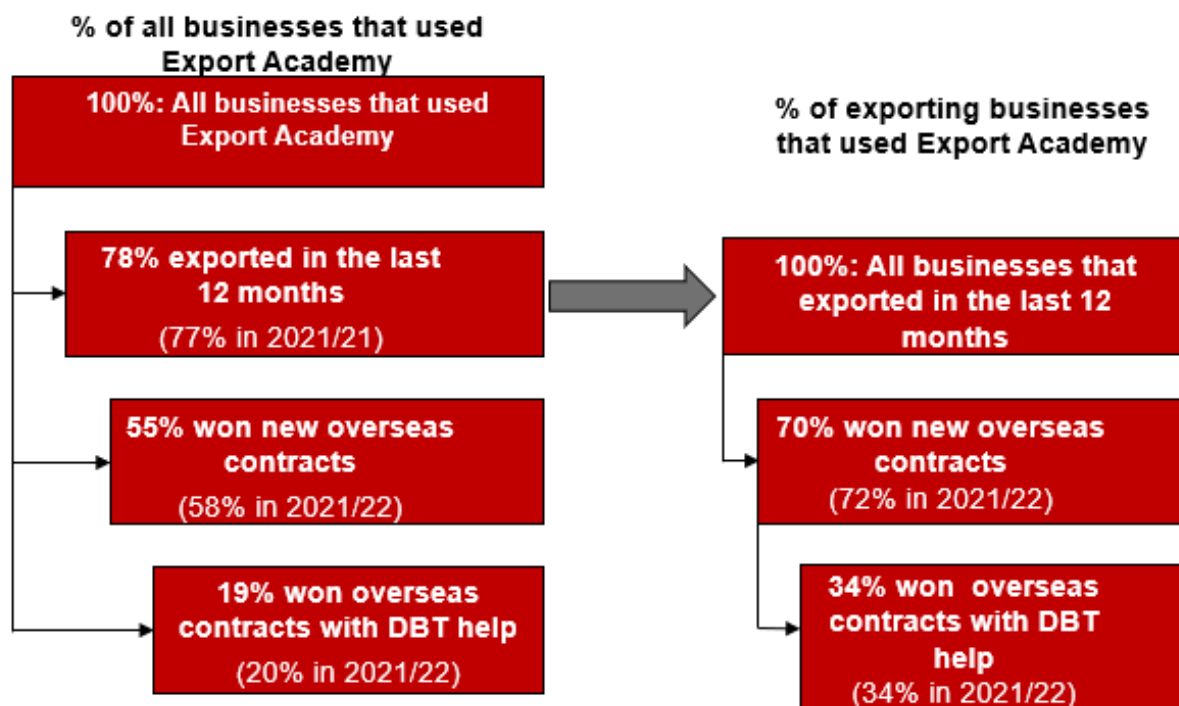
Chart 4.4.24 Profile of RIS Respondents – Export Academy



Caption: Base: All businesses that used Export Academy (n=338 (2022/23), n=251 (2021/22)); *All businesses that used Export Academy not including 'Don't know' and 'Refused' responses (n=214 (2022/23), n=190 (2021/22)). * Redacted due to small base size

Description: Three clustered bar charts comparing exporter status, turnover and size in 2022/23 and 2021/22. The main findings were presented in the text preceding the chart.

Chart 4.4.25 Summary of businesses supported by Export Academy



Median value of export sales won per business with DBT support:
£24,870 (£46,173 in 2021/22)

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

Caption: Base: All businesses that used Export Academy (n=338 (2022/23), n=251 (2021/22)); All businesses that used Export Academy and that exported in the last 12 months (n=267 (2022/23), n=197 (2021/22)); All businesses that used Export Academy and that won at least one overseas business contract in the last 12 months (n=192 (2022/23), n=138 (2021/22)); All businesses that used Export Academy and that won at least one overseas business contract with the help of DBT (n=60 (2022/23), n=48 (2021/22))

Description: Flow chart showing how the proportion of overseas contracts won with DBT help is calculated. These findings are described in detail earlier in this chapter.

4.5 Webinars

Webinars are organised by International Trade Advisors, Overseas Posts, and DBT HQ teams. They are delivered by experts from both private and public sector organisations. The primary aim is to provide information to a target audience, ranging from experienced exporters to businesses that are new to exporting.

This chapter explores the impact of using the Webinars service on businesses, in terms of their exports, growth, and sales. The findings are based on interviews with 134 businesses that used Webinars between April 2022 and March 2023 and participated in both the Quality Survey (QS) and RIS.

4.5.1 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 (67%) reported that they had identified new export opportunities or made new contacts, while around 3 in 5 (58%) had researched the paperwork and regulations needed to export. Among non-exporters, more than half (55%) had assessed the business' readiness to export after using Webinars. These results are in line with the previous year.

Impact on exporting

The proportion of businesses classified as 'Sustain' (i.e. currently exporting) was in line with the previous year (72% compared to 78% in 2021/22) and was also similar to the proportion in the QS 2022/23 (74%). There was an increase in businesses classified as 'Reassure' (that had exported before but not in the last 12 months) (12%, up from 5% in the RIS 2021/22).

Impact on winning contracts

Of the businesses that exported, almost 9 in 10 (87%) reported winning new overseas business contracts or gaining extensions to existing overseas contracts in the past year since using the Webinars service. 8 in 10 (81%) reported that they won new overseas contracts, and this included 3 in 10 who had won more than ten new contracts (29%, up from 14% in 2021/22).

Overall, 59% of businesses won a new overseas contract, including 21% saying this was with Webinars or DBT assistance. Among businesses that reported DBT support was important in helping them win these contracts,

Impact on exposure and growth

Three quarters of businesses who won any new overseas business contracts with the help of DBT said Webinars assisted with expansion into a new market (78%) or expansion within an existing market (77%).

Among all businesses, 1 in 5 (22%) reported being exposed to or starting to do business in at least one new market. Of these, Asia (55%) remained the most common new market for increased exposure or business. These results were in line with the previous year.

Impact on contacts and networks

Around half of businesses (49%) made at least one new overseas contact after using Webinars, in line with the previous year. The average number of contacts made was three.

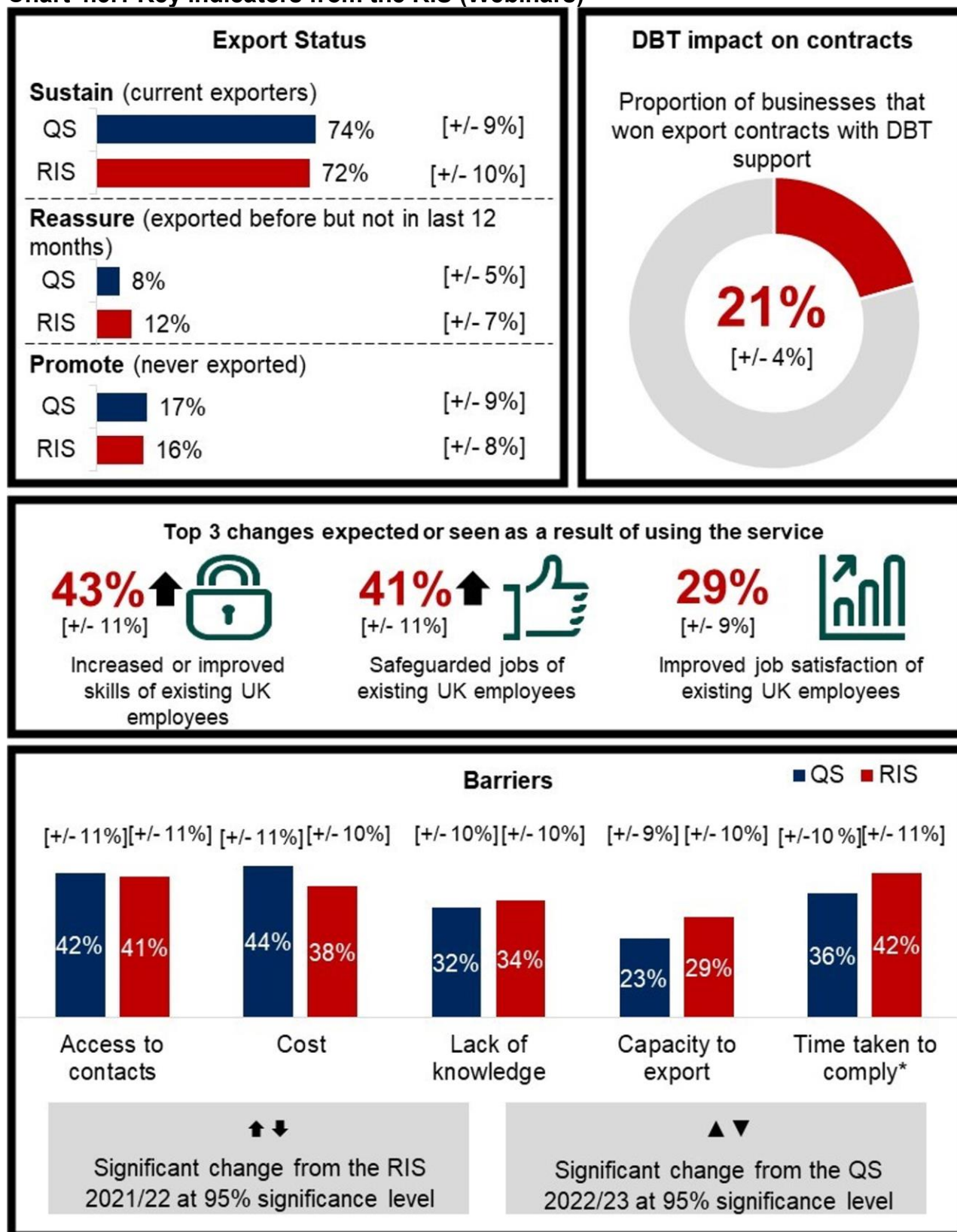
Impact on confidence

Three in ten businesses reported that using the Webinars service boosted their confidence to export in a new market (30%) and boosted their confidence to increase exports in an existing market (33%). These results were in line with the RIS 2021/22.

Other impact

Around half (53%) of businesses reported that the Webinars service helped them to gain access to information that they would otherwise have been unable to come by. 4 in 10 (39%) said that using the Webinars service had helped them to gain access to prospective customers, business partners or other people. Results were in line with the previous year.

Chart 4.5.1 Key indicators from the RIS (Webinars)



Caption: Base: All businesses that used Webinars and completed both surveys (n=134); Barriers - Access to contacts (QS n=134, RIS n=134), Cost (QS n=132, RIS n=134), Lack of knowledge (QS n=134, RIS n=134), Capacity to export (QS n=133, RIS n=134), Time to comply (QS n=133, RIS n=132 * Code amended or added in 2022/23).

Description: A collection of charts showing headline findings for businesses using the service. This includes findings for export status, DBT impact on contracts, changes expected or seen as a result of using the service and barriers. These findings are described in more detail throughout this chapter.

4.5.2 Satisfaction with Webinars (from Quality Survey)

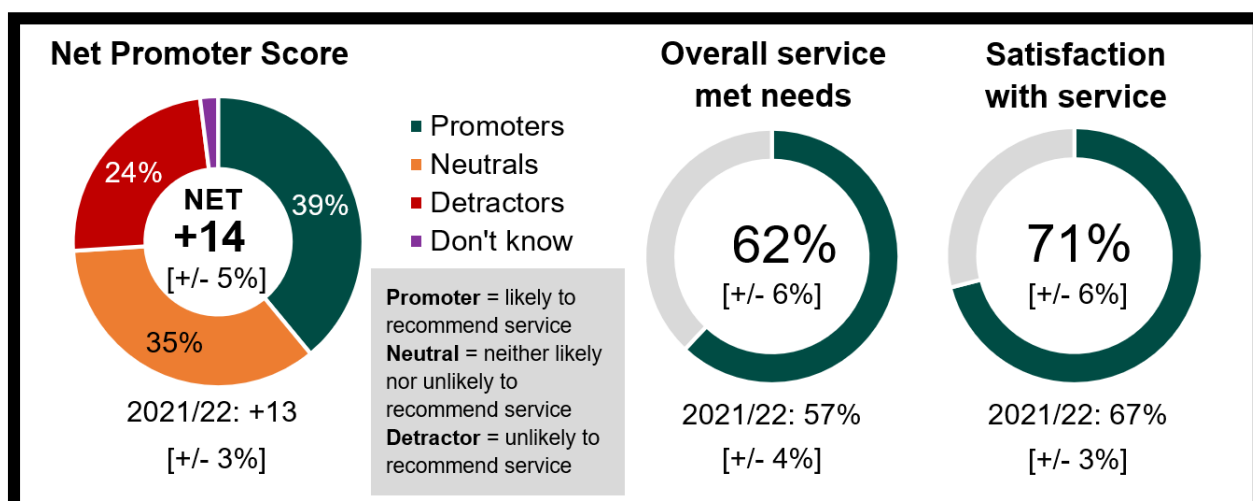
In the QS 2022/23, around 2 in 5 businesses (39%) that used Webinars said they would recommend the service, while a quarter (24%) said they would not. This gave Webinars a Net Promoter Score (NPS) of +14. 7 in 10 (71%) reported they were satisfied with the Webinars service, and around 6 in 10 (62%) said the overall service met their needs. These results were in line with the previous year.

Webinars users were most positive about how straightforward the Webinars registration process was (88%) and staff knowledge (83%). Findings were in line with the previous year.

As a result of using Webinars, nearly 3 in 5 (57%) businesses that were not exporting at the time of using the service had assessed the business' readiness to export. Among all Webinars respondents, around half of businesses said they had identified new export opportunities or made new contacts (48%). Around 2 in 5 (41%) said they had researched the paperwork and regulations needed to export, while a third (34%) had looked for other export support services. Businesses were more likely to have secured finance or funding than in the previous year (13% compared to 7% in 2021/22).

Webinars users were most likely to report that 'cost' was a barrier to exporting (47%, up from 36% in 2021/22), followed by 'access to contacts, customers and the right networks' (42%) and 'time' (38%).

Chart 4.5.2 Net Promoter Score and Satisfaction with service (from Quality Survey) – Webinars



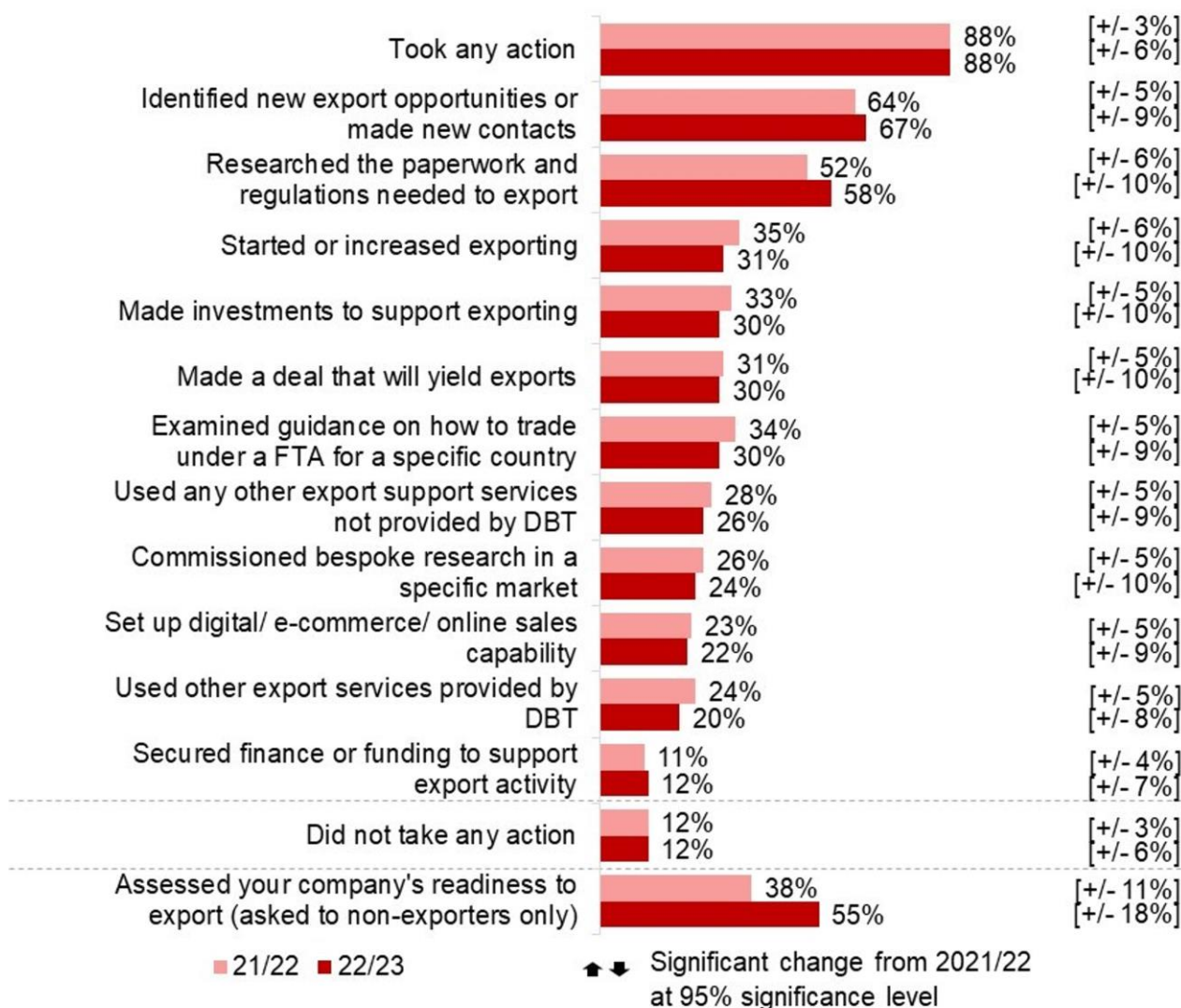
Caption: Base: All businesses who used the service (n=1,155 (2021/22), n=362 (2022/23)); Overall service met needs - All businesses who used the service (excluding 'not applicable' responses) (n=1,120 (2021/22), n=355 (2022/23)); Satisfaction - All businesses who used the service (excluding 'not applicable' responses) (n=1,147 (2021/22), n=357 (2022/23))

Description: A collection of three circle charts, showing the NPS score – broken down into Promoters, Neutrals and Detractors – followed by the percentage that thought the overall service met needs, and the percentage satisfaction with service.

4.5.3 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 4.5.3). Two thirds (67%) reported that they had identified new export opportunities or made new contacts, while around 3 in 5 (58%) had researched the paperwork and regulations needed to export. More than half of businesses (55%) that were not exporting had assessed the business' readiness to export. These results were in line with the previous year.

Chart 4.5.3 What the business has done as a result of receiving the service – Webinars

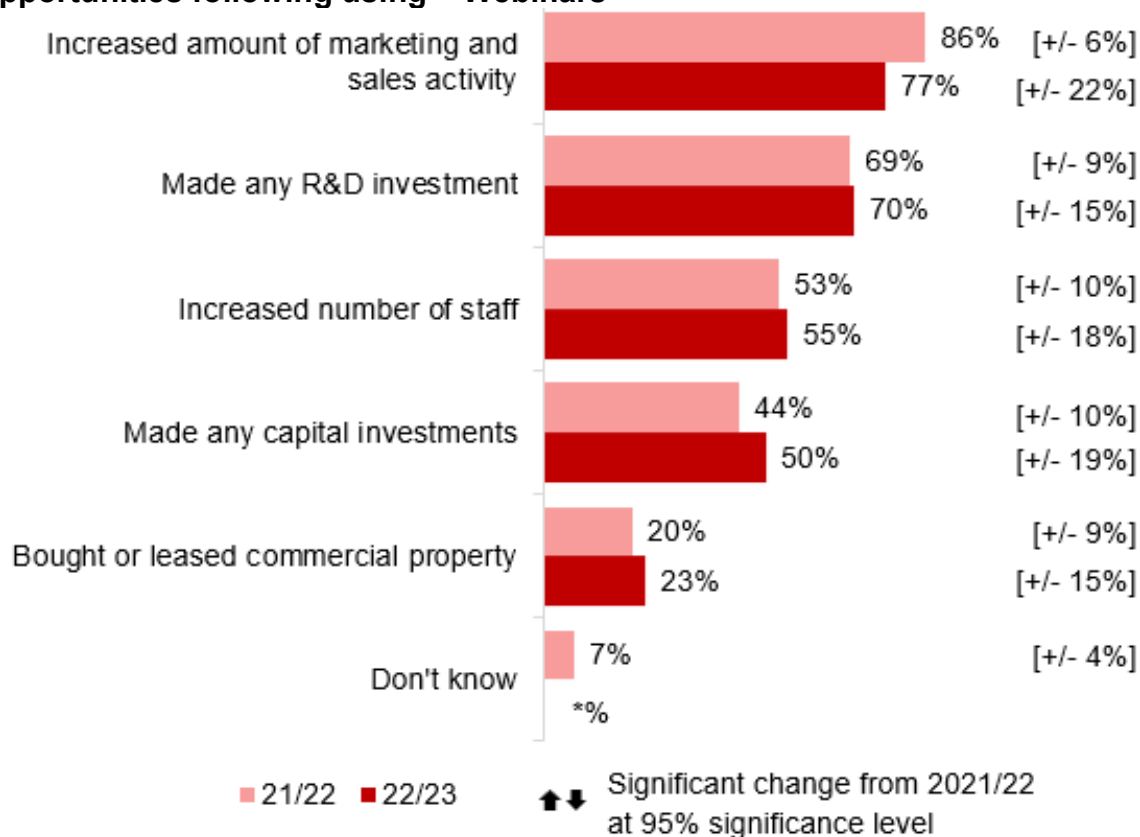


Caption: QResultService: What has your business done as a result of the service?
Base: All businesses that used Webinars (n=134 (2022/23), n=472 (2021/22)); All businesses that used Webinars and were non-exporters (n=38 (2022/23), n=103 (2021/22))

Description: Clustered bar chart comparing what businesses have done as a result of using the service in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Businesses that had made an investment as a result of using the Webinars service were asked what investments they had made (46 respondents). As shown in Chart 4.5.4, the most common answer was an increase in marketing and sales activity (77%), followed by R&D investment (70%) and an increase in the number of staff (55%). These results were in line with the previous year.

Chart 4.5.4 Type of investments made to support new or increased export opportunities following using – Webinars



Caption: 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=46 (2022/23), n=142 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing what type of investments businesses have made to support new or increased export opportunities following using Webinars in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

Businesses were asked what organisations they had been in contact with since using Webinars (Chart 4.5.5). Around 3 in 10 businesses had been in contact with Innovate UK (29%) or Chambers of Commerce in the UK (28%). Around 1 in 4 had been in contact with

HMRC (23%). 3 in 10 (31%) businesses had not been in contact with any other organisations regarding assistance with overseas trade.

Chart 4.5.5 What organisations respondents have been in contact with since receiving the service – Webinars



Caption: QAnyContact: Since your business used the service 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=134 (2022/23), n=472 (2021/22)). Coded responses with 5% or more in 2021/22 are included.* Redacted due to small base size

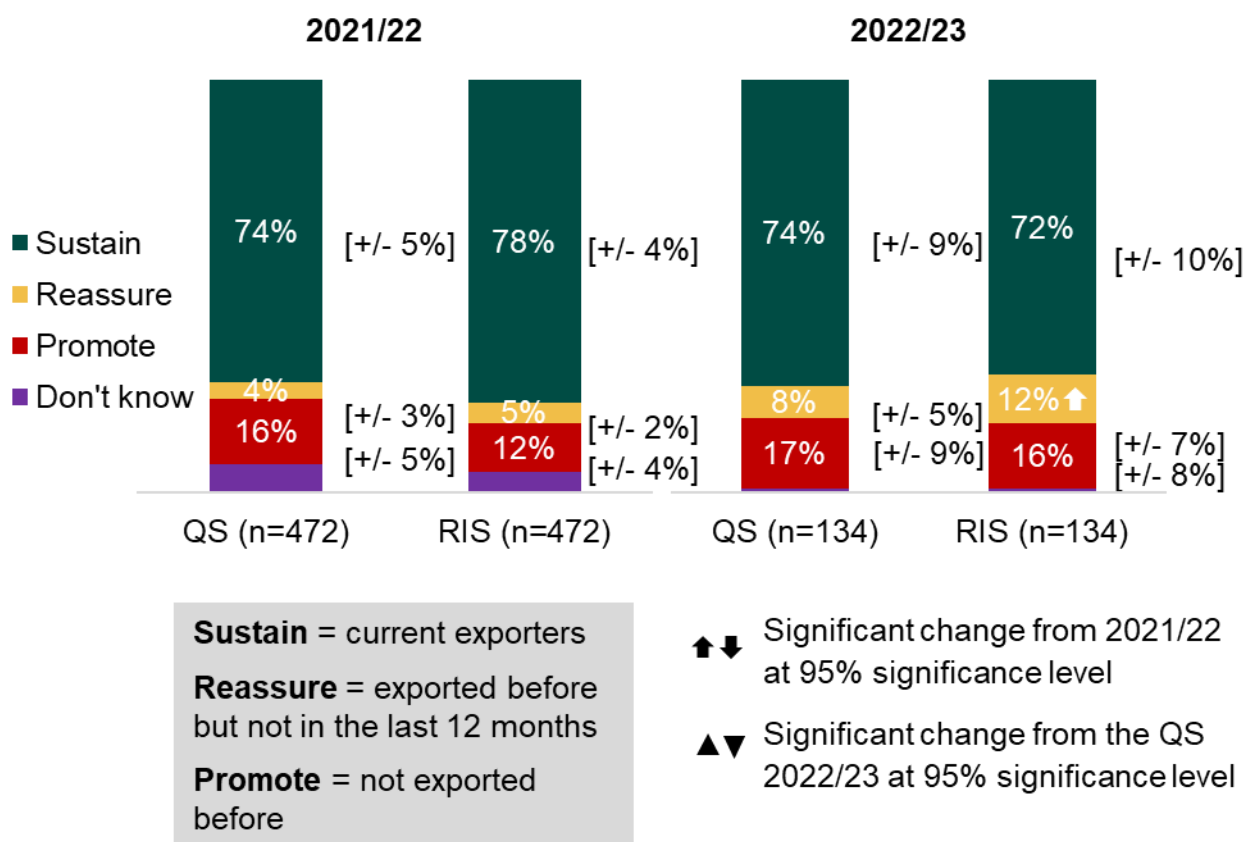
Description: Clustered bar chart comparing what organisations respondents have been in contact since receiving the service in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

4.5.4 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 2 surveys were analysed to see whether the export status of these businesses had changed over this period. DBT 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 (74%) that used Webinars fell into this segment at the time of the service delivery (QS 2022/23). This remained similar (72%) 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. Among Webinars users, 8% fell into this segment at the time of the service delivery (QS 2022/23), and this was similar (12%) in the RIS 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. Around 1 in 6 (17%) of those that used Webinars were in this segment at the time of the service delivery (QS 2022/23), and this was similar (16%) in the RIS 12 months later.

Chart 4.5.6 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Webinars



Caption: Source: Composite measure merging data from several variables.
Base: All businesses that used Webinars and completed both surveys (Quality Survey: n=134 (2022/23), n=472 (2021/22); RIS: n=134 (2022/23), n=472 (2021/22))

Description: Stacked bar charts comparing the export status of respondents at the time of service delivery in 2022/23 to 2021/22, split between sustain, reassure and promote. The main findings were presented in the text preceding the chart.

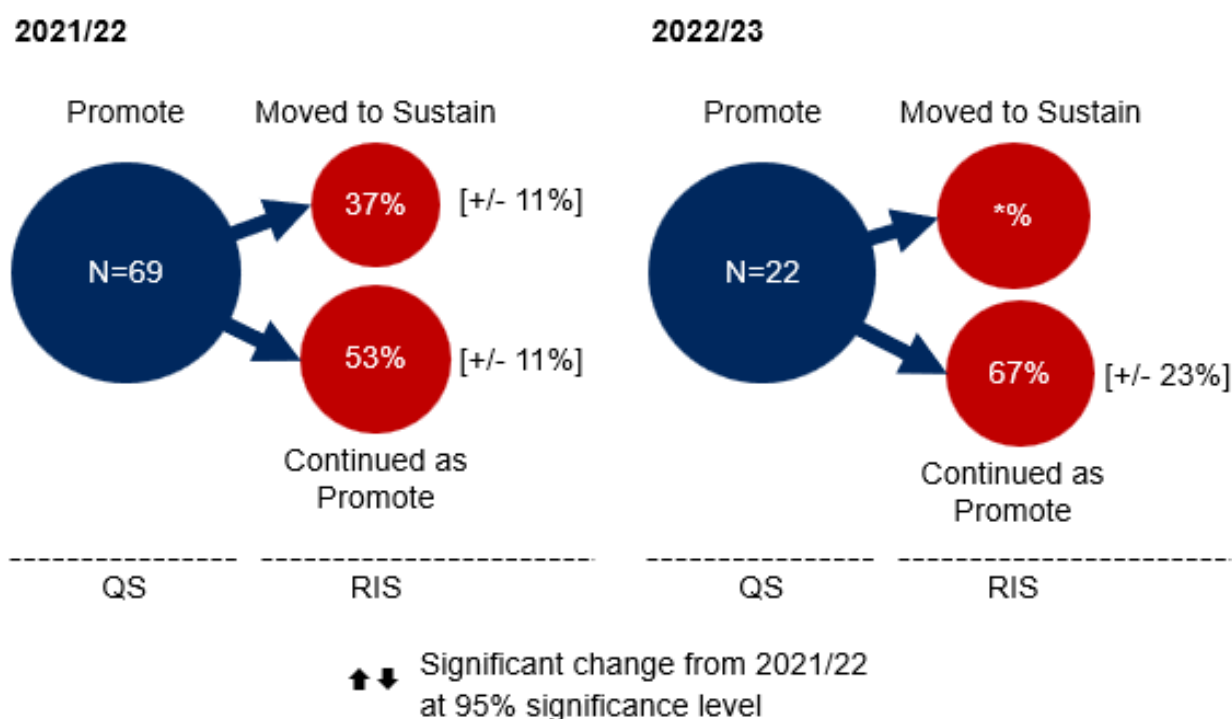
Table 4.5.1 Change in export status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Webinars

Quality Survey Export status	RIS Export status	Percentage	Change since 2021/22
Sustain (n=102)	Sustain	92% [+/- XX%]	
	Reassure	*% [+/- XX%]	
	Promote	*% [+/- XX%]	

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. **Very small base size. * redacted due to small base size

Considering businesses that were in the Promote segment (never exported) at the time of the Quality Survey (22 businesses), 67% remained in Promote (Chart 4.5.7). On the other hand, considering businesses that were in the Sustain segment at the time of the Quality Survey (102 businesses), 92% continued in Sustain.

Chart 4.5.7 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS) – Webinars



Caption: Source: Composite measure merging data from several variables. Base: All businesses that used Webinars who were in the Promote segment in the Quality Survey: n=22 (2022/23), n=69 (2021/22). * Redacted due to small base size

Description: Two charts showing the proportion of respondents who moved from 'Promote' status in the QS to 'Sustain' or 'Promote' in the RIS. One chart is for 2021/22 and the other is for 2022/23. The main findings were presented in the text preceding the chart.

4.5.5 Reported export contract 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 (Chart 4.5.8). Businesses were asked to think about all contracts, not just those assisted by Webinars or DBT.

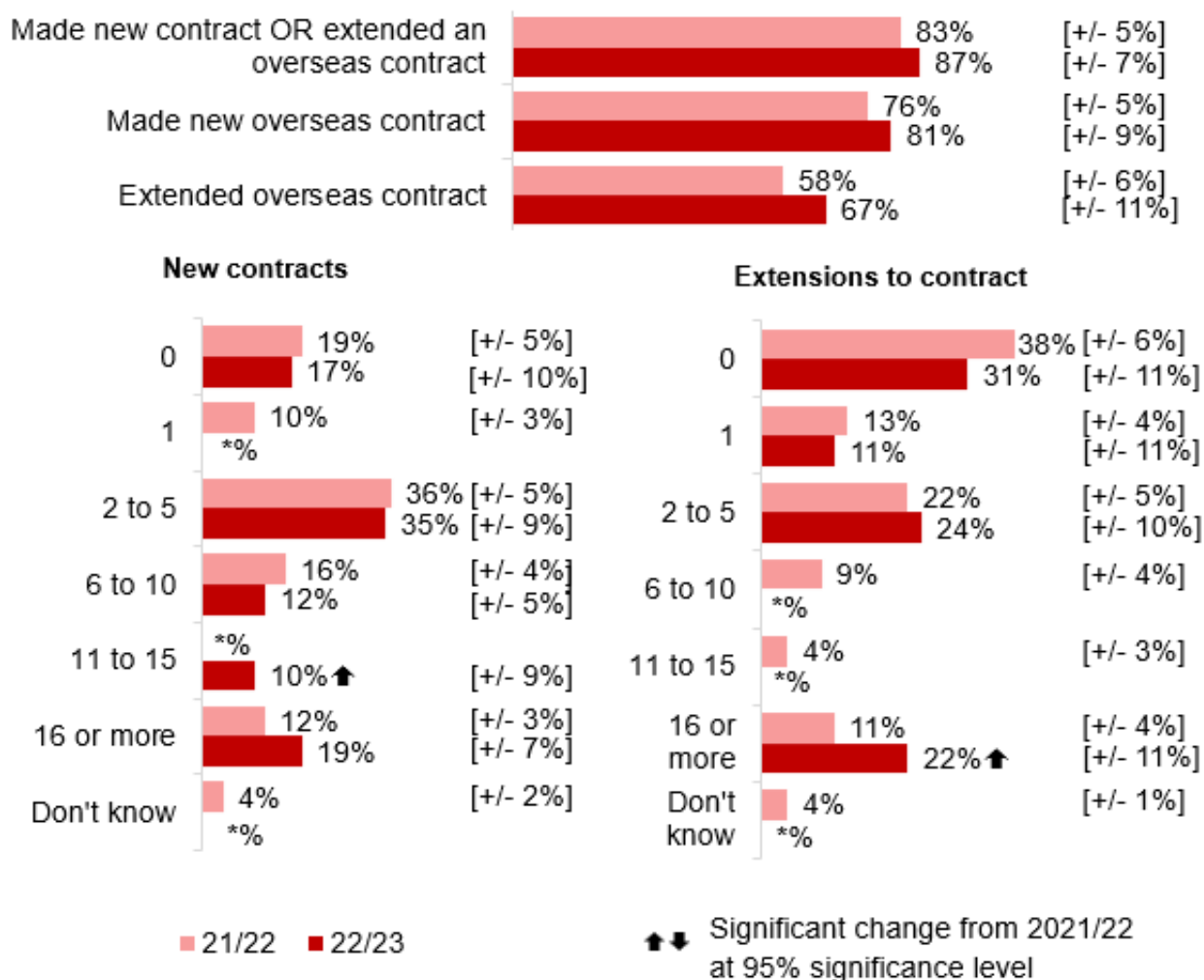
Of the 102 businesses that were exporting or had exported in the previous 12 months, almost 9 in 10 (87%) reported that they had won new overseas business contracts and/or had gained extensions to existing overseas business contracts in the year since they used the service.

8 in 10 (81%) of these businesses that were exporting or had exported in the previous 12 months had won new overseas business contracts in the year since they used the service. Specifically, around a third (35%) had won between 2 and 5 overseas contracts and 1 in 5 businesses (19%) had won 16 or more overseas contracts (Chart 4.5.8). One in six businesses reported winning no new contracts (17%).

Compared with the previous year, more businesses said they had won more than 10 new contracts (29%, up from 14% in 2021/22). The median number of contracts won among exporting businesses that had used Webinars was 4, compared with two in 2021/22.

Two thirds (67%) of businesses that were exporting or had exported in the previous 12 months that used Webinars reported they had gained extensions to existing overseas business contracts in the year since they used the service. Around 1 in 10 (11%) extended one contract, and 1 in 4 (24%) extended between 2 and 5 contracts. Around 1 in 5 (22%) extended 16 or more existing overseas sales contracts, higher than the previous year (up from 11% in 2021/22). 3 in 10 (31%) businesses had not extended any existing contracts (Chart 4.5.8). The median number of contracts extended (including those that did not extend any) was one, similar to the previous year.

Chart 4.5.8 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 – Webinars



Caption: QNewcontract: How many new overseas business contracts for export sales did you win in the past year?

QExtendcontract: 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=102 (2022/23), n=382 (2021/22)); All businesses that used Webinars and were currently selling, or had previously sold goods or services overseas in the previous 12 months, and that answered how many new business contracts were won in the past year (n=102 (2022/23), n=373 (2021/22)). * Redacted due to small base size

Description: A set of clustered bar charts comparing data between 2021/22 and 2022/23. One compares the proportion that made or extended overseas contracts, the second compares the proportion of numbers of new contracts, and the last compares the proportion of numbers of extensions to contracts. The main findings were presented in the text preceding the chart.

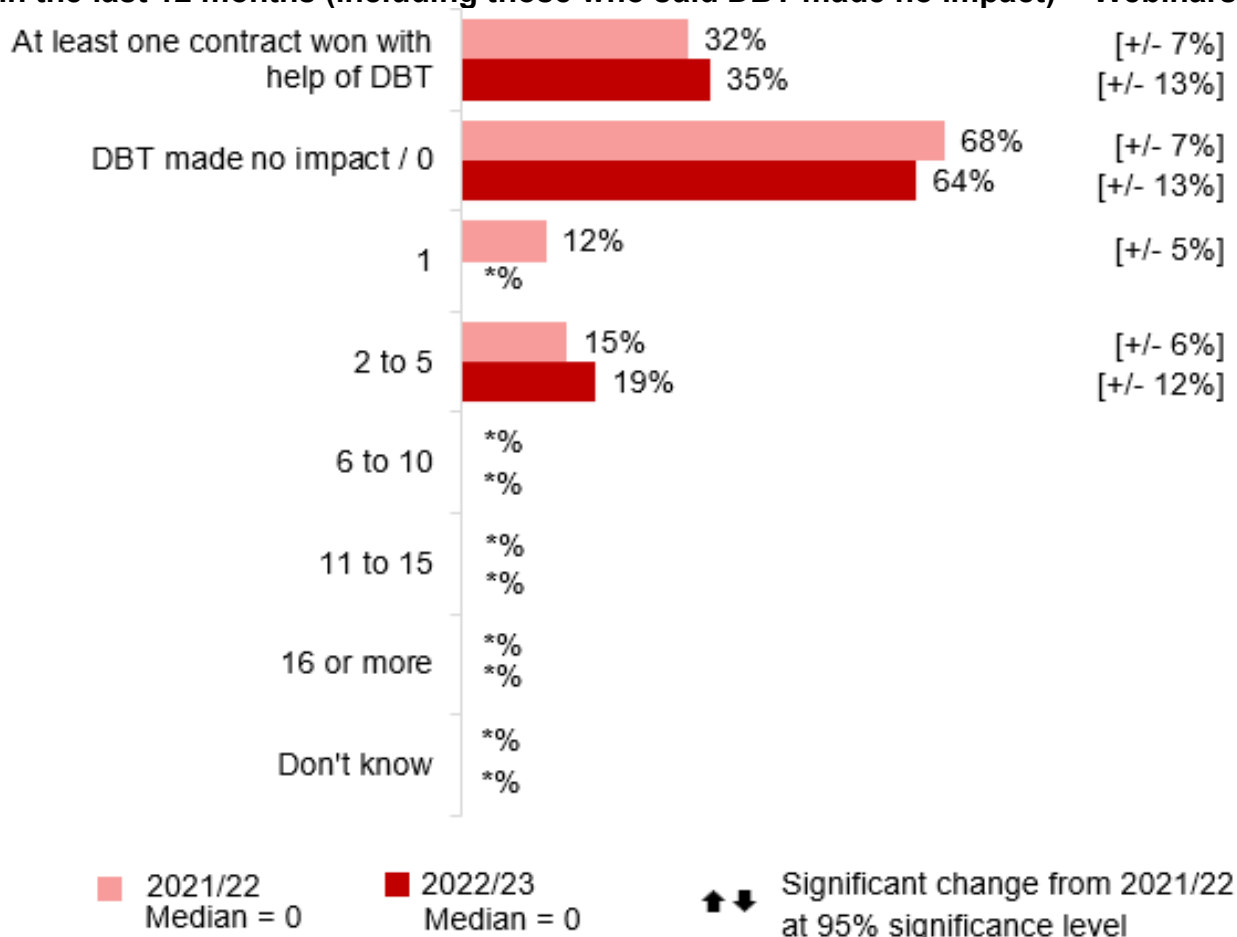
Reported additional contracts which were gained because of DBT support

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 DBT. In total, 80 businesses (that is 60% of the businesses that were interviewed overall) felt able to provide an estimate and were surveyed about their experiences.

As shown in Chart 4.5.9 below, a third of businesses (35%) said they had won at least one contract with the help of DBT, while two thirds of businesses (64%) said they won no new overseas sales contracts with the help of DBT, or using DBT services made no impact.

Around a fifth (19%) had won between 2 and 5 contracts. The median number of contracts that DBT helped win was zero, for current exporters that used Webinars. This was in line with the previous year.

Chart 4.5.9 Number of new overseas contracts said to be won with the help of DBT in the last 12 months (including those who said DBT made no impact) – Webinars



Caption: QContractDBT: 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 DBT?

QContractNumber: How many new overseas contracts were won with help from DBT?

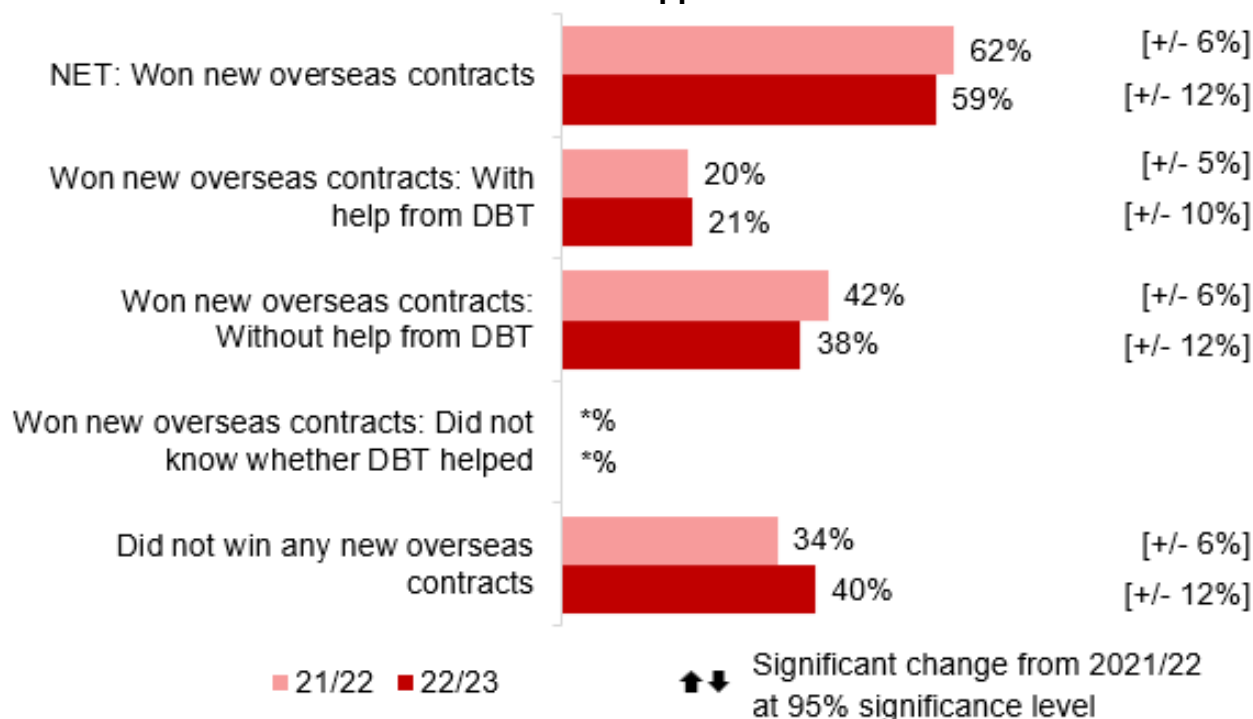
Base: All businesses that used Webinars and were able to estimate the number and value

of new overseas business contracts that they won in the last 12 months (n=80 (2022/23), n=291 (2021/22)). Median values include zero. * Redacted due to small base size

Description: Clustered bar chart comparing the number of new overseas contracts said to be won with the help of DBT in the last 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DBT (Chart 4.5.10). Among all businesses that had used Webinars, 59% said they had won new overseas contracts (either with help from DBT, without help from DBT, or were unsure whether DBT helped). More specifically, 21% of Webinars users said that they had won contracts with help from DBT, while 38% said they had won contracts without help from DBT. These results were in line with the previous year.

Chart 4.5.10 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 DBT support – Webinars



Caption: Source: Composite measure merging data from several variables. Base: All businesses that used Webinars (n=134 (2022/23), n=472 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing the proportion of businesses reported or estimated to have won or not won new overseas contracts with or without DBT support in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

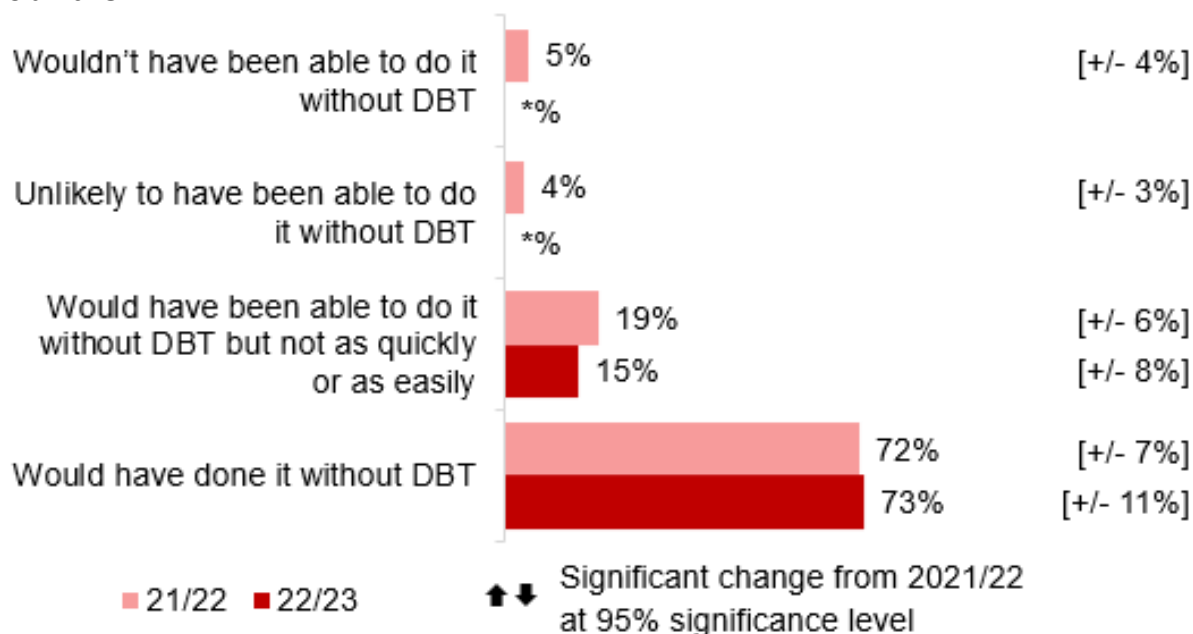
Importance of DBT's support in winning overseas contracts

The survey explored views on the importance of DBT'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 DBT in the last 12 months, since the delivery

of the Webinars service. Exporting businesses who said that DBT 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 DBT' to better understand the level of support that the Webinars service provided.

Around a quarter of these businesses (27%) reported that DBT support was important in helping them win these contracts to some extent. This includes 15% that thought they would not have been able to do it as quickly or easily without DBT support (Chart 4.5.11). The remaining 73% thought they would have been able to achieve the same outcome without DBT support. These results were in line with the previous year.

Chart 4.5.11 How important DBT's help was in winning overseas contracts – Webinars



Caption: QContractHelp: How important was DBT's help in winning these overseas contracts?

Base: All businesses that used Webinars and won any new overseas contracts in the past year (n=80 (2022/23), n=291 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing how important DBT's help was in winning overseas contracts in 2021/22 to 2020/21. The main findings were presented in the text preceding the chart.

4.5.6 Reported value of export sales achieved since receiving the service

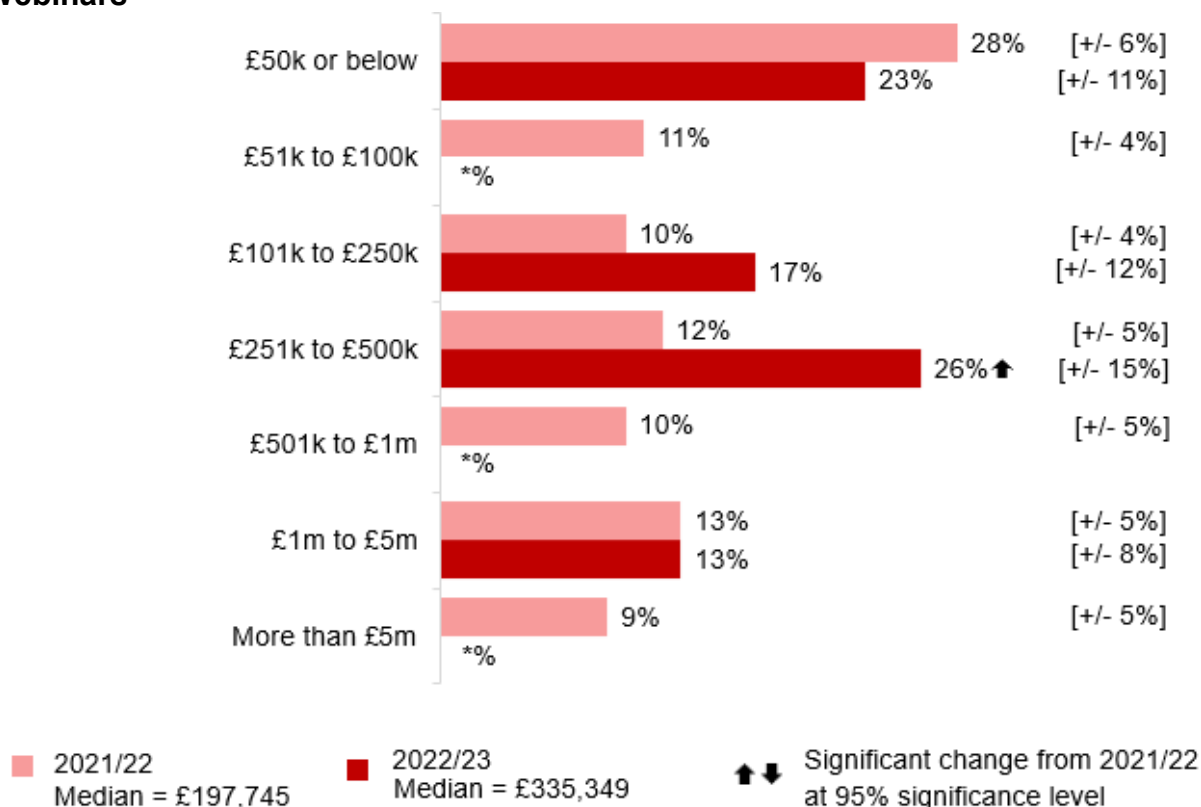
Reported value of the export sales of new contracts

The 59% 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 4.5.12). The median value of the export sales of all new overseas contracts for these businesses was £335,349 (compared to £197,745 in the RIS 2021/22).³⁴ Around a quarter (23%) had won contracts with an export sales value of £50,000 or below. 1 in 5 (19%) said that the export sales value of the new overseas contracts won was more than £1 million.

Compared to the previous year, more businesses said they had won contracts with an export sales value of between £251,000 and £500,000 (26%, up from 12% in 2021/22).

³⁴ Values are not adjusted for inflation when comparing to 2021/22.

Chart 4.5.12 Value of all new overseas contracts made in previous 12 months – Webinars



Caption: 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=80 (2022/23), n=291 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing the value of all new overseas contracts made in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

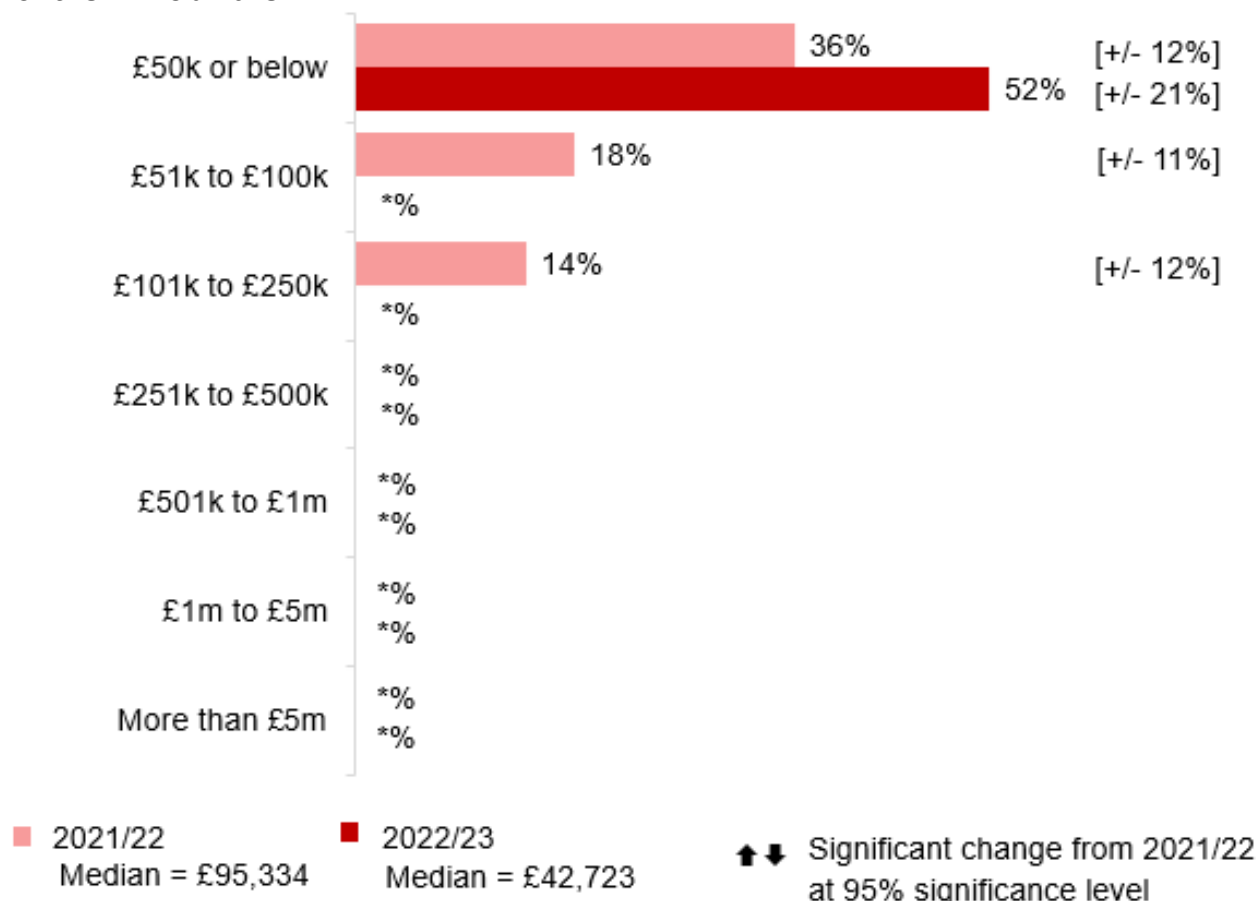
Reported additional value of DBT support

This section considers the value of DBT 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 DBT. The analysis in this section measures the additional contribution that DBT 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 DBT support. This data was used to estimate the 'reported additional export sales' – that is, the reported additional impact of using DBT services on export sales. The reported additional export sales for Webinars was £42,723, across all the contracts that Webinars helped businesses to win (compared to £95,334 in the RIS 2021/22). Note that this does not include businesses that did not win any new export contracts, or businesses that said DBT made no impact on overseas contract wins.

Around half of businesses (52%) reported additional export sales of £50,000 or below, and 8% reported additional new export sales of between £51,000 and £100,000 (Chart 4.5.13). These results were in line with the previous year.

Chart 4.5.13 Value of new overseas contracts helped by DBT support in previous 12 months – Webinars



Caption: QContractValueDBT: What was the value of these new overseas business contracts that your business won with the help of support from the service or DBT last year?

Base: All businesses that used Webinars and won any new overseas business contracts with the help of DBT (n=29 (2022/23), n=84 (2021/22)). * Redacted due to small base size

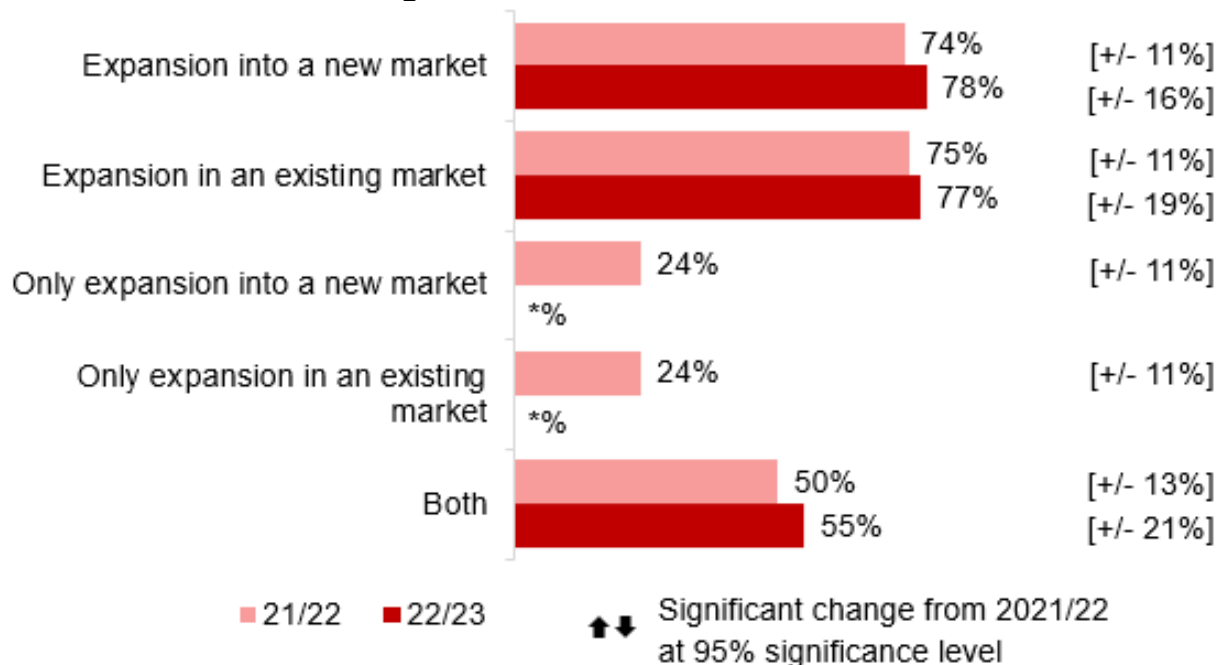
Description: Clustered bar chart comparing the value of all new overseas contracts made with DBT support in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

4.5.7 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 (Chart 4.5.14). This question was asked to businesses that said DBT support helped them to win new overseas contracts and were able to provide details of the number and value of these contracts. Three quarters of businesses said they were assisted with expansion into a new market (78%) or expansion within an existing market (77%).

More than half (55%) reported that DBT helped them expand into both existing and new markets. These results were in line with the previous year.

Chart 4.5.14 Whether new contracts won with DBT's help represented expansion into new markets or existing markets – Webinars



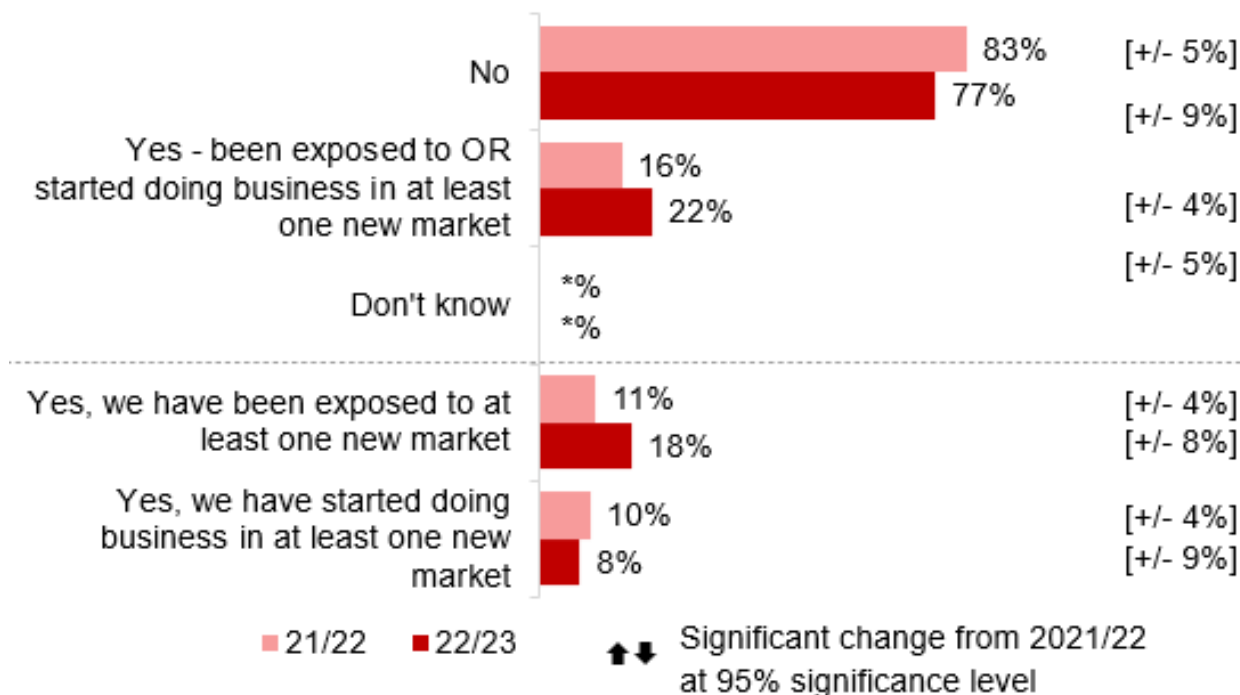
Caption: QContractRepresent: Did these new overseas contracts represent ...?

Base: All businesses that used Webinars and won any new overseas business contracts with the help of DBT (n=28 (2022/23), n=84 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing whether new contracts won with DBT help represented expansion into new or existing markets in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

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 service (Chart 4.5.15). Around 1 in 5 businesses said they had been exposed to at least one new market (18%), and 8% had started doing business in at least one new market as a result of using the Webinars service. In total, around 1 in 5 (22%) said they had either been exposed to or had started doing business in at least one new market. These results were in line with the previous year.

Chart 4.5.15 Whether increased exposure or starting business in a new overseas market – Webinars



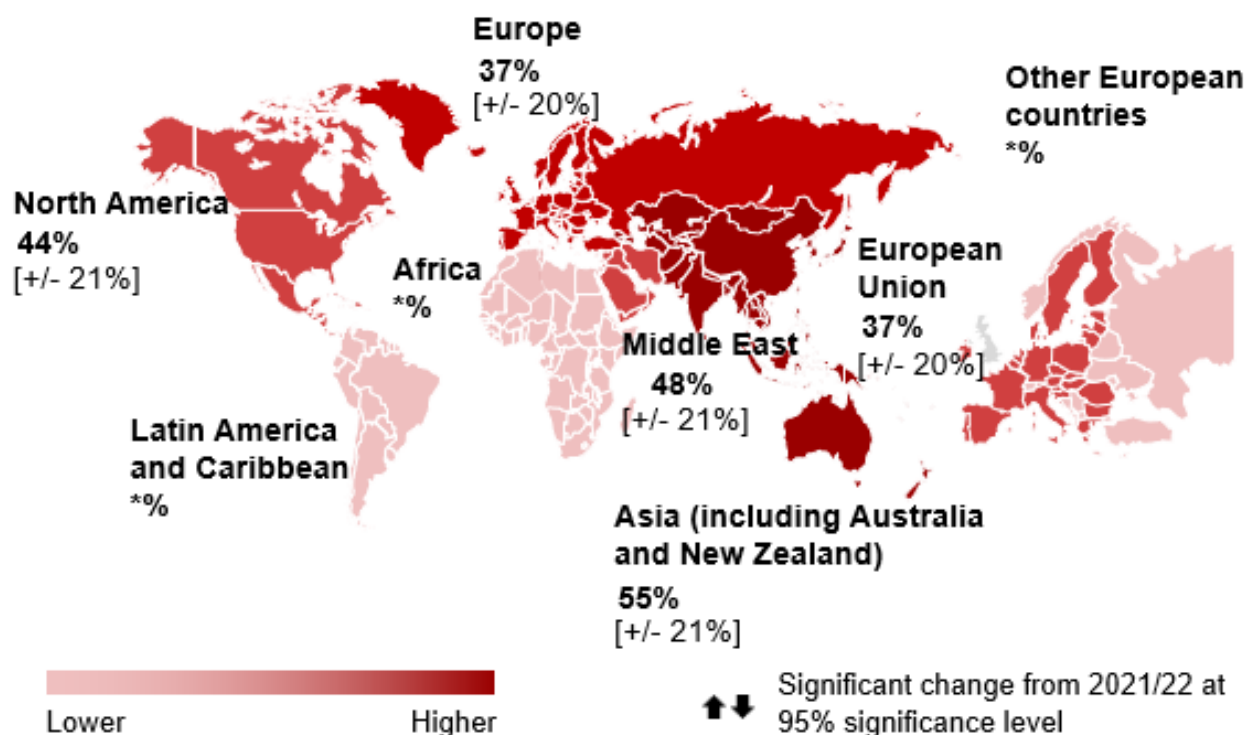
Caption: QGrowthDBT: Has your business had increased exposure to or started doing business in a new overseas market in the past year?
 Base: All businesses that used Webinars (n=134 (2022/23), n=472 (2021/22)). * redacted due to small base size

Description: Clustered bar chart comparing whether increased exposure or starting business in a new overseas market in previous 12 months in 2022/23 to 2021/22. The main findings were presented in the text preceding the chart.

As shown in Chart 4.5.16 and Table 4.5.2, the most common new market for increased exposure or business was Asia (including Australia and New Zealand) (55%), followed by the Middle East (48%), North America (44%) and Europe (37%). Looking in more detail at Europe, 37% reported that their increased exposure or new business was within the European Union.

These results were in line with the previous year.

Chart 4.5.16 The new markets that the organisations have started doing business in or been exposed to – Webinars



Caption: QNewRegion: Which of the following new markets has your business started doing business in or been exposed to?

Base: All businesses that used Webinars and have had increased exposure to, or started doing business in at least one new market (n=29 (2022/23), n=63 (2021/22)). * Redacted due to small base size

Description: A map of the world. Regions that businesses have done more business in or are more exposed to are shown as darker. The main findings were presented in the text preceding the chart.

Table 4.5.2 The new markets that the organisations have started doing business in or been exposed to – Webinars

Region	2021/22	CI (+/-)	2022/23	CI (+/-)	Change
Europe	35%	15%	37%	20%	-
European Union	31%	14%	37%	20%	-
Other European countries	16%	13%	***0%	-	-
Asia (including Australia and New Zealand)	42%	15%	55%	21%	-
Middle East	34%	15%	48%	21%	-
Africa	22%	13%	***0%	-	-
North America	18%	12%	44%	21%	-
Latin America and Caribbean	-	-	***0%	-	-

Base	63*	29**
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*Small base size; **Very small base size. *** Redacted due to small base size

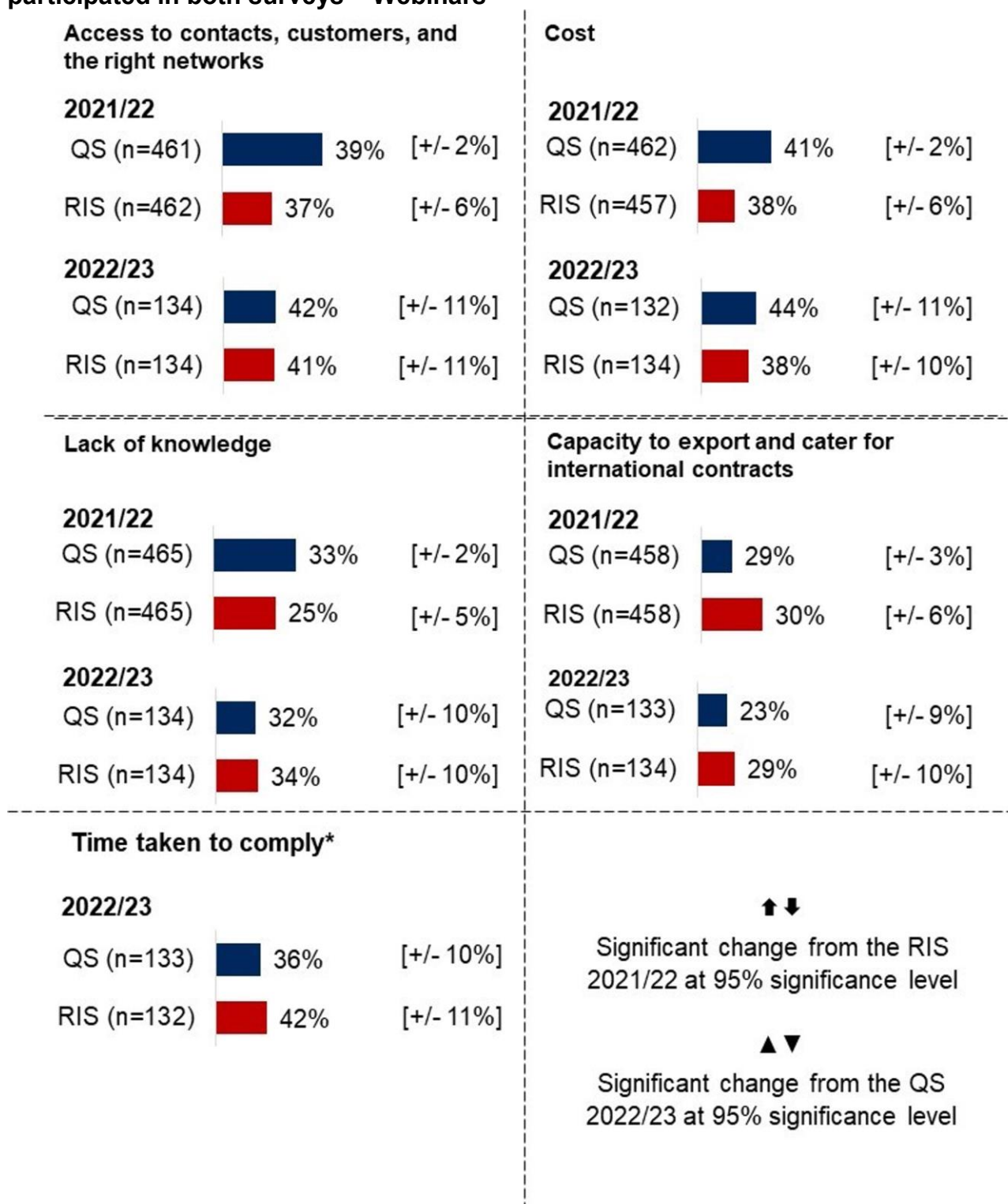
4.5.8 Barriers to exporting

As shown in Chart 4.5.17, businesses were asked in both the QS and RIS about **five 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).

The top barrier in the RIS 2022/23 was 'time taken to comply' (42%), followed by 'access to contacts' (41%) and 'cost' (38%).

Results were consistent with the previous year (RIS 2021/22) and the QS 2022/23.

Chart 4.5.17 Barriers to exporting – QS and RIS comparison with businesses who participated in both surveys – Webinars



Caption: 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 the service not including those who gave a 'not applicable' answer. *Code amended or added in 2022/23

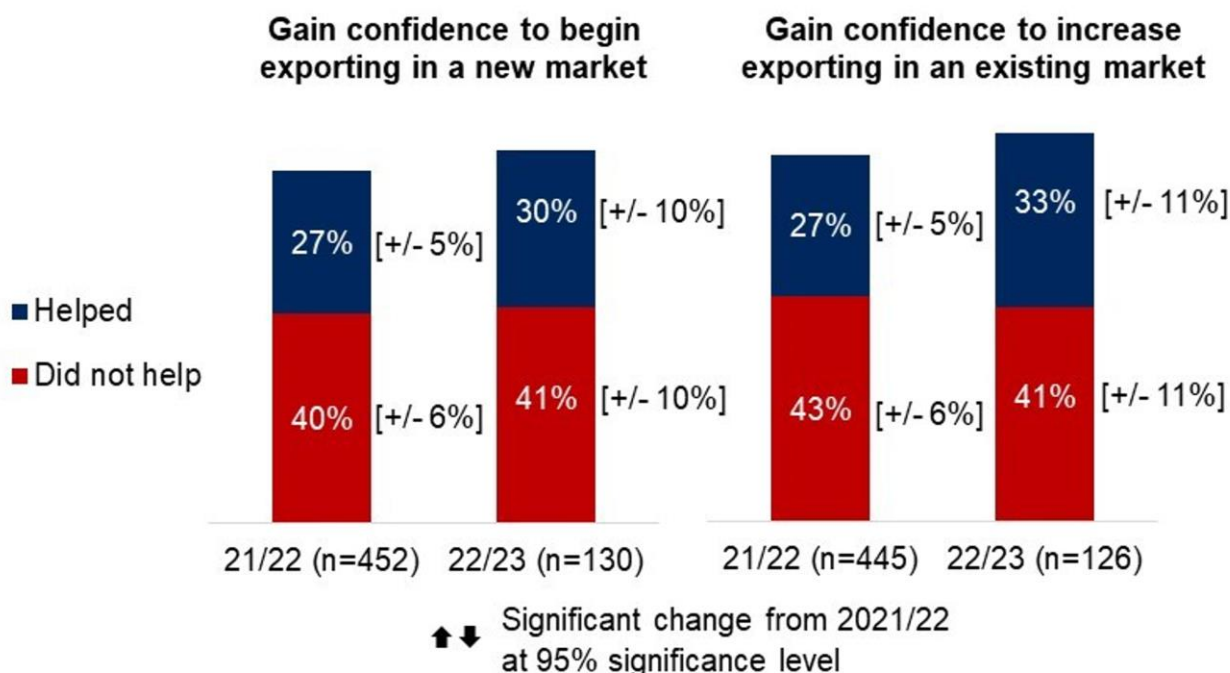
Description: A set of horizontal bar charts comparing the proportion of QS and RIS respondents encountered barriers. The barriers include access to contacts, customers and the right networks, cost, lack of knowledge, capacity to export and cater for international contracts and time taken to comply.

4.5.9 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 (Chart 4.5.18). 3 in 10 reported that using the Webinars service had helped them gain confidence to begin exporting in a new market (30%) and confidence to increase exporting in an existing market (33%). At the same time, 4 in 10 businesses said Webinars did not help them gain confidence to begin exporting in a new market (41%) or to increase exporting in an existing market (41%).

Results were in line with the previous year.

Chart 4.5.18 To what extent using the Webinars service helped to build confidence to export – Webinars



Caption: 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 the service help you to ...? Helped (7-10), Neutral (4-6), Did not help (0-3).

Base: All businesses that used the service not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown.

Description: Stacked bar chart comparing confidence in exporting between QS and RIS in 2021/22 and 2022/23. The main findings were presented in the text preceding the chart.

Businesses were asked to think about the extent to which the service had **helped them improve their knowledge**. Chart 4.5.19 below shows how businesses rated the impact of using the Webinars service on their knowledge.

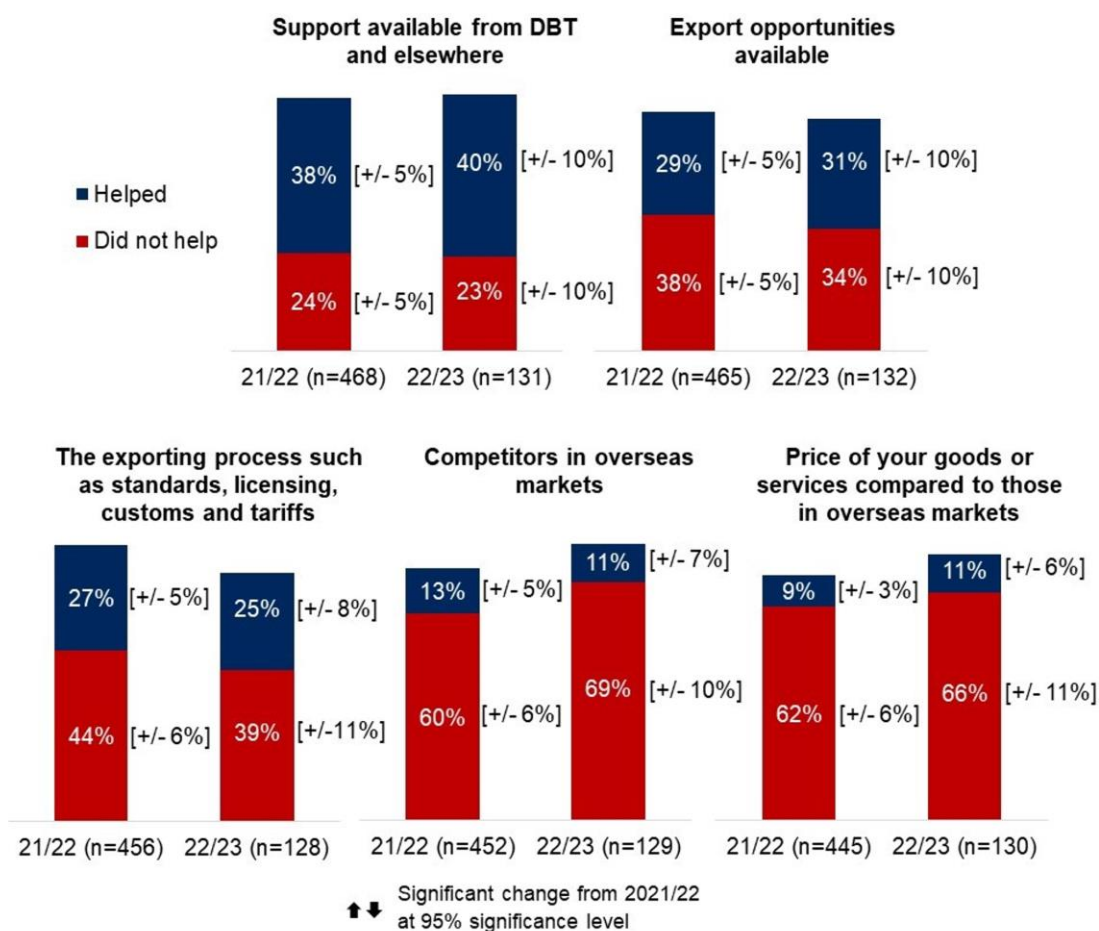
On balance, more businesses reported that using the Webinars service was **helpful for increasing their knowledge of support available to them (from DBT and elsewhere)**. Four in ten (40%) said the service helped to do this, and a quarter (23%) said it did not help them do this.

However, a third of businesses (34%) said the service did not help them to improve their knowledge of **export opportunities available**, slightly higher than the proportion that said it did help them (31%). Similarly, 2 in 5 (39%) reported that the Webinars service had not helped them improve their knowledge of the **exporting process**, while 25% said it was helpful.

Only small proportions said that using Webinars improved their knowledge about their **competitors in overseas markets** (11%) and of **the price of goods** compared with those in overseas markets (11%). In both cases, the majority said that it did not help them improve their knowledge (69% for competitors in overseas markets and 66% for the price of goods).

Results were in line with the previous survey.

Chart 4.5.19 To what extent the business felt that their knowledge has improved as a result of using the service – Webinars



Caption: QImproveKnowledge: Using the same scale, to what extent do you feel that your business improved its knowledge of the following as a result of the service? Helped (7-10), Neutral (4-6), Did not help (0-3).

Base: All businesses that used the service not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown

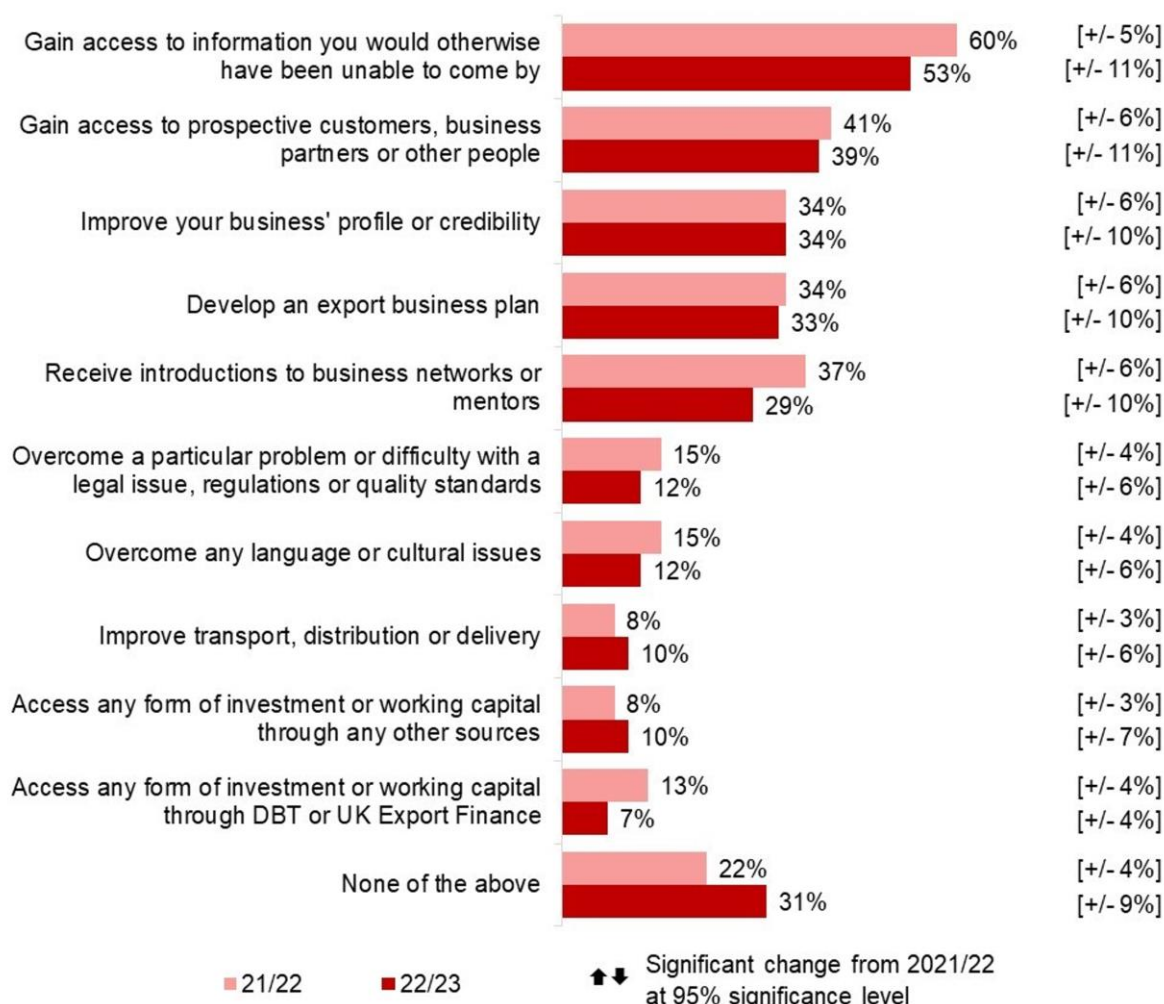
Description: Five stacked bar chart comparing the extent to which businesses felt their knowledge had improved as a result of using the service, between QS and RIS in 2021/22 and 2022/23. The main findings were presented in the text preceding the chart.

Businesses were asked about other ways they had benefitted from using Webinars in the year between using Webinars and taking part in the RIS. A detailed breakdown of responses is shown in Chart 4.5.20.

The top response was gaining access to information that they would otherwise have been unable to come by (53%), followed by gaining access to prospective customers or other people that they would otherwise have been unable to meet (39%). 3 in 10 (31%) felt that using the Webinars service had not helped them in any of the ways listed.

Results were in line with the previous year.

Chart 4.5.20 In what ways has the business felt it had benefited from DBT support – Webinars



QServiceBenefit: in which of the following ways if any, has your business benefited specifically from the service over the last year?
 Base: All businesses that used Webinars (n=134 (2022/23), n=472 (2021/22))

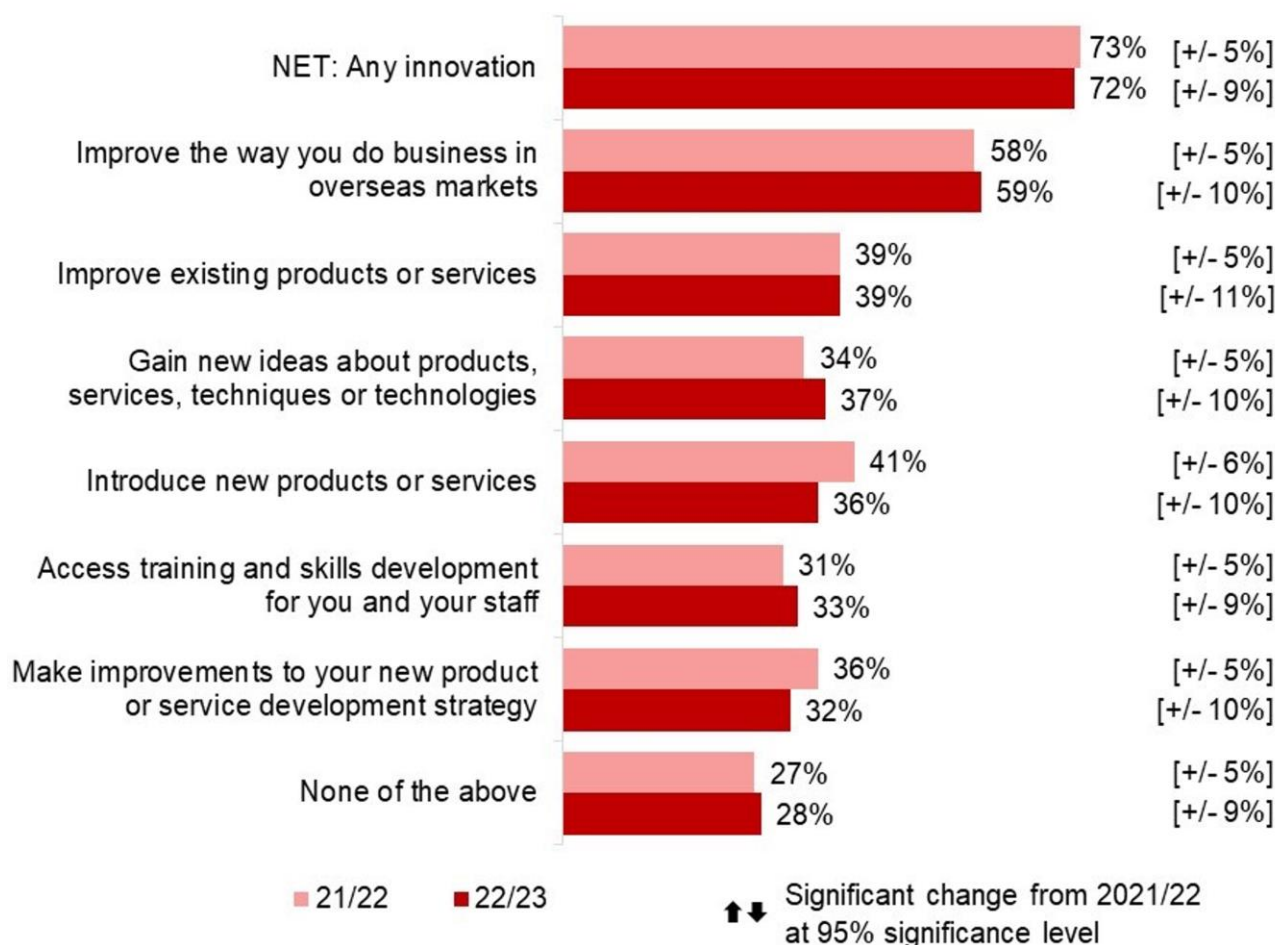
Caption: CQServiceBenefit: in which of the following ways if any, has your business benefited specifically from the service over the last year?

Base: All businesses that used Webinars (n=134 (2022/23), n=472 (2021/22))

Description: Clustered bar chart comparing how businesses felt they had benefitted from DBT support in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

Businesses were asked whether using the Webinars service had helped, or was likely to help, support innovation and/or development in their business (Chart 4.5.21). Nearly three quarters (72%) 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 (59%) or to improve existing products or services (39%). These results were in line with the RIS 2021/22.

Chart 4.5.21 Whether the service has / is likely to help innovation and development – Webinars



Caption: QInnovationSupport: 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=134 (2022/23), n=472 (2021/22))

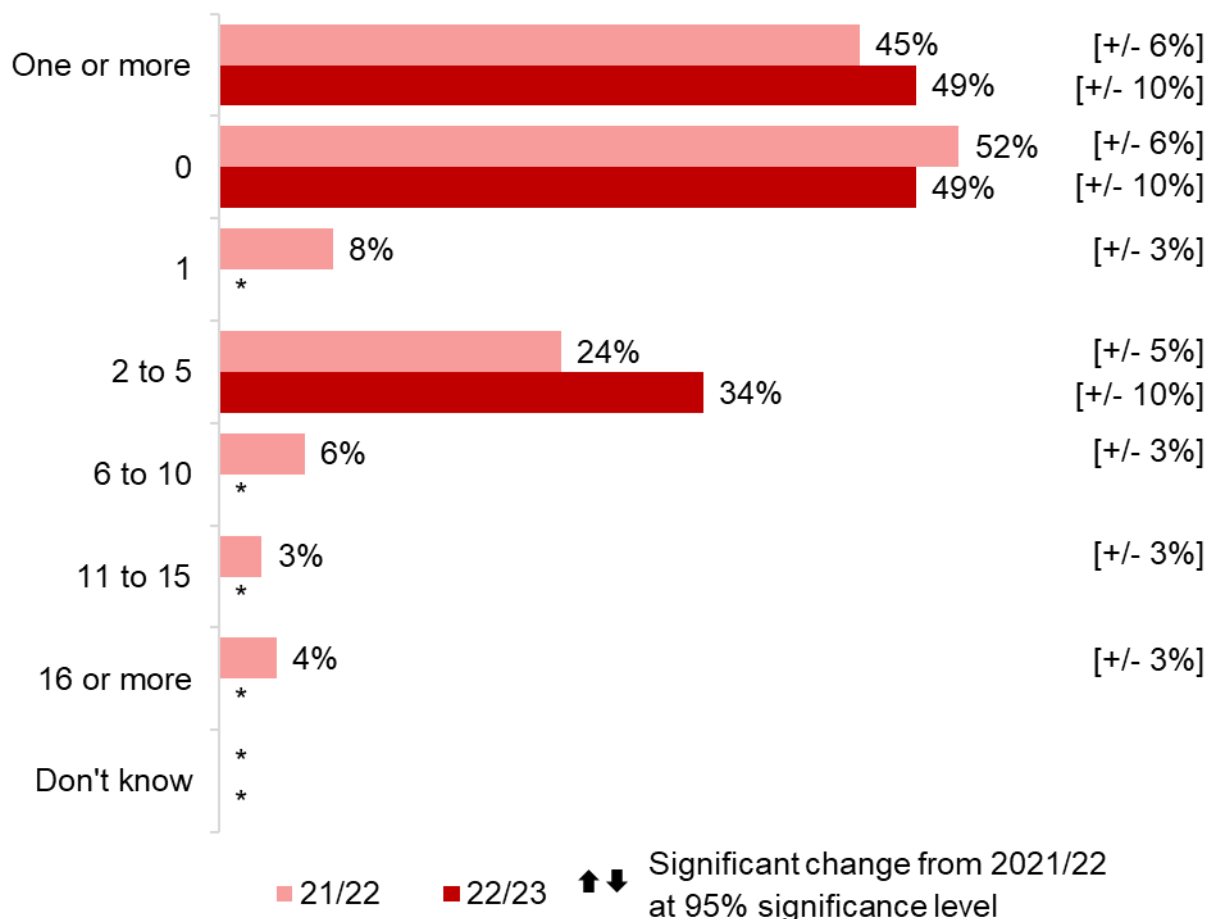
Description: Clustered bar chart comparing if businesses felt the service had been or is likely to help innovation and development in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

International contacts

Businesses were asked how many overseas contacts they had made as a result of using Webinars over the past year (Chart 4.5.22). Around half (49%) of businesses made at least one new overseas contact in the year since using the Webinars service, with 34% making between 2 and 5 new contacts. Half (49%) of businesses reported that they had not made any new contacts as a result of using the Webinars service. The average number of contacts made was three, the same as in the RIS 2021/22.

Other results were also in line with the previous year.

Chart 4.5.22 Number of new overseas contacts made in previous 12 months – Webinars



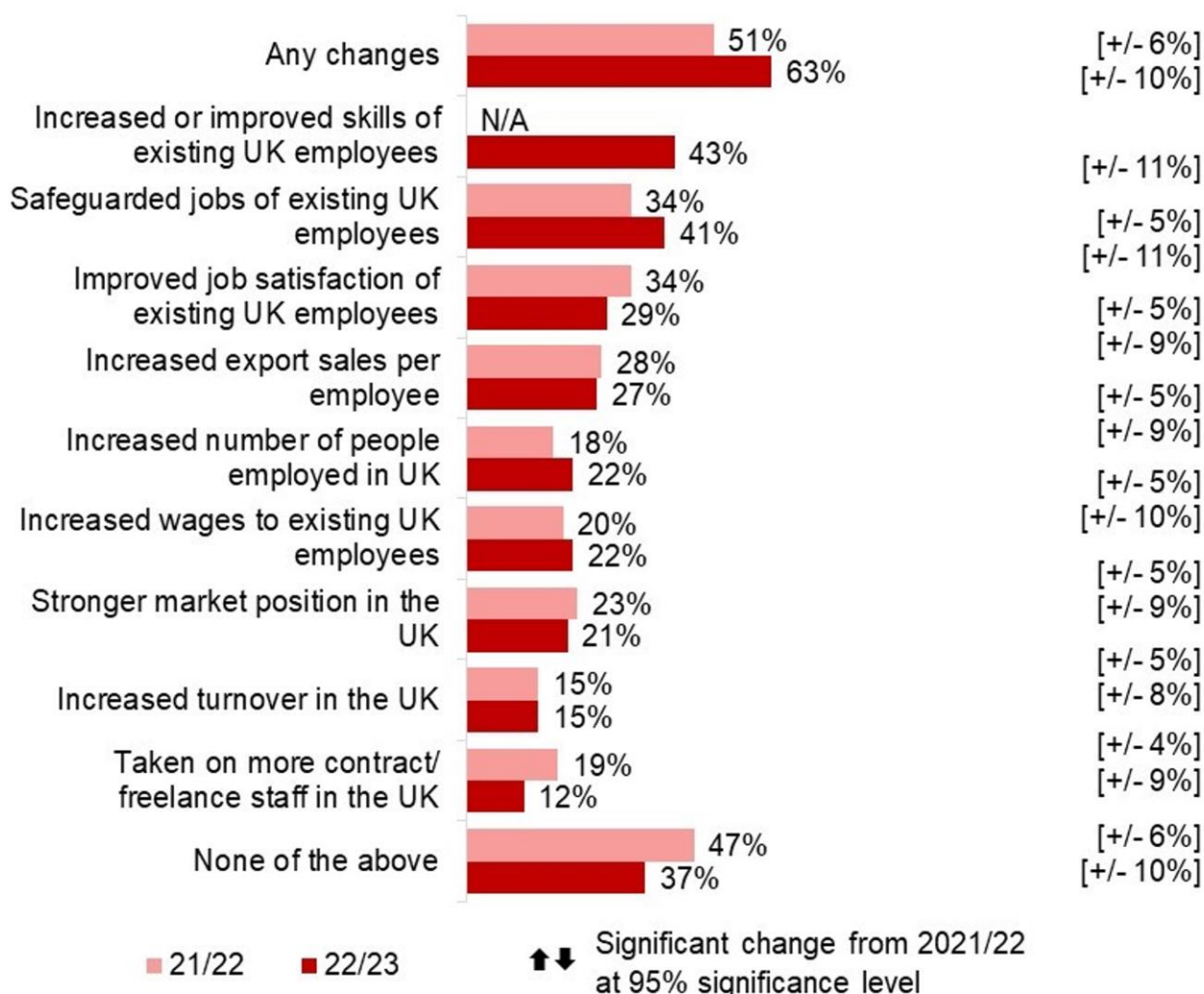
Caption: QContactsMade: How many new overseas contracts, if any, did your business make as a result of the service in the past year?

Base: All businesses that used Webinars (n=134 (2022/23), n=472 (2021/22)). * Redacted due to small base size

Description: Clustered bar chart comparing the number of new overseas contacts made in the previous 12 months in 2022/23 and 2021/2022. The main findings were presented in the text preceding the chart.

Businesses were asked about the impact they had seen or expected to see as a direct result of using the Webinars service. Around 3 in 5 (63%) expected or had seen some kind of change, with the most common responses being increased or improved skills of existing UK employees (43%) and safeguarding jobs of existing UK employees (41%). These results were in line with the previous year.

Chart 4.5.23 Changes expected / seen in the UK business as a result of receiving the service – Webinars



Caption: QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service?

Base: All businesses that used Webinars (n=134 (2022/23), n=472 (2021/22))

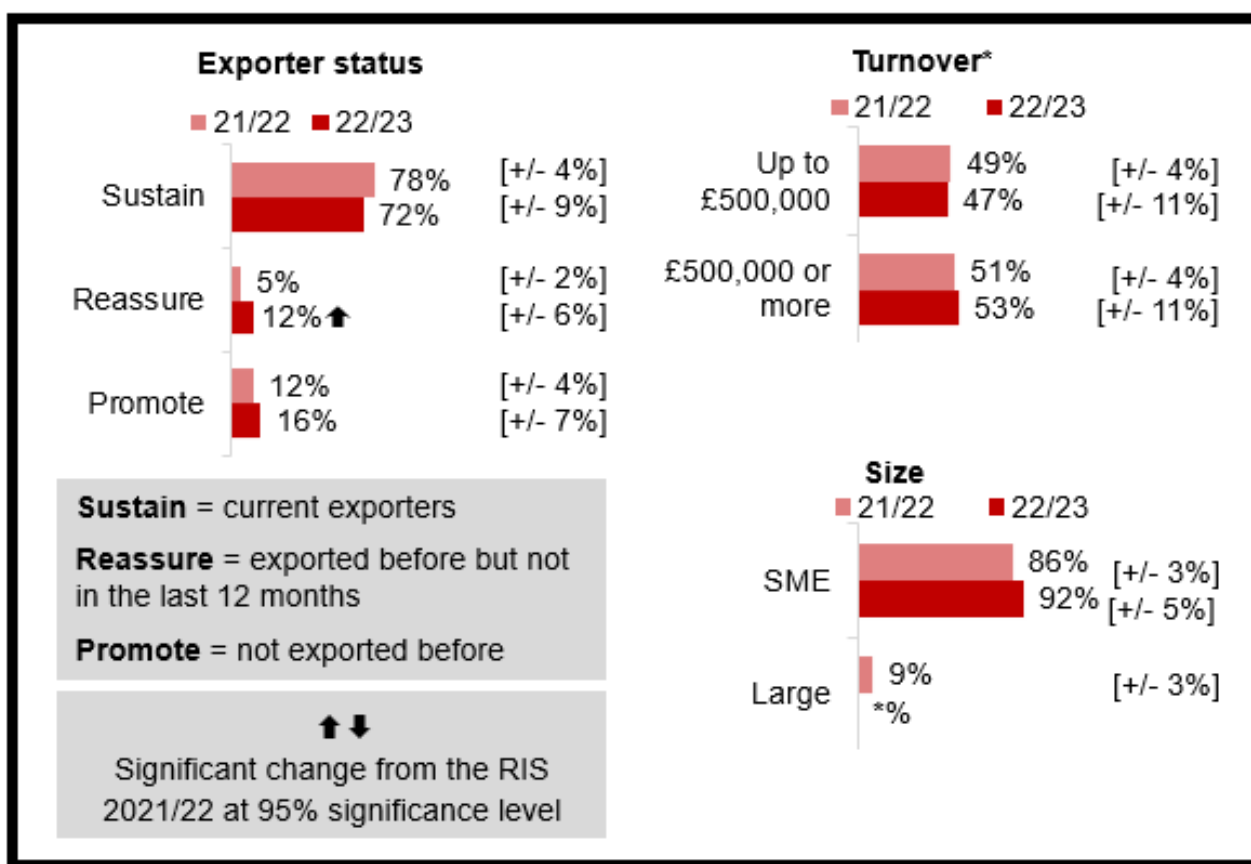
Description: Clustered bar chart comparing changes expected or seen in the business as a result of using the service in 2022/23 and 2021/22. The main findings were presented in the text preceding the chart.

4.5.10 Profile of respondents

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), around 7 in 10 (72%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months. As shown in Chart 4.5.24, there was an increase in businesses that had exported before but not in the last 12 months (12%, up from 5% in 2021/22).

There was no change in business profile in terms of turnover since the previous year..

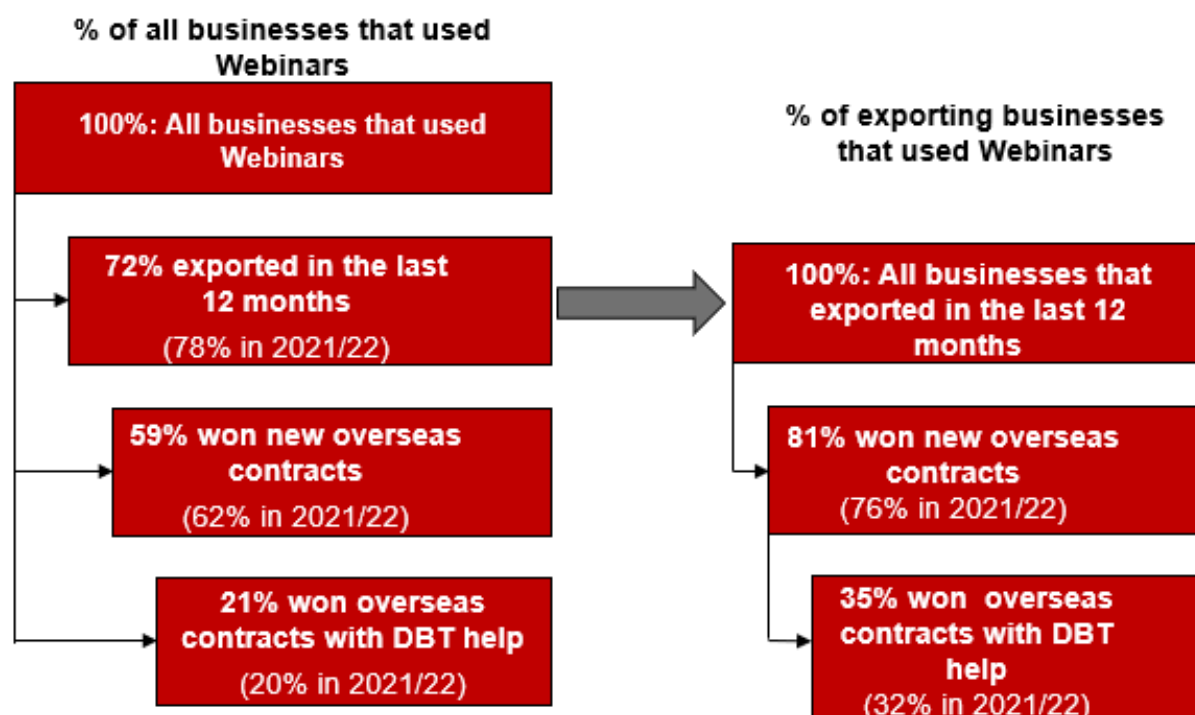
Chart 4.5.24 Profile of RIS Respondents – Webinars



Caption: Base: All businesses that used Webinars (n=134 (2022/23), n=472 (2021/22));
 *All businesses that used Webinars not including 'Don't know' and 'Refused' responses (n=90 (2022/23), n=365 (2021/22)). * Redacted due to small base size

Description: Three clustered bar charts comparing exporter status, turnover and size in 2022/23 and 2021/22. The main findings were presented in the text preceding the chart.

Chart 4.5.25 Summary of businesses supported by Webinars



Median value of export sales won per business with DBT support:

£42,723 (£95,334 in 2021/22)

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

Caption: Base: All businesses that used Webinars (n=134 (2022/23), n=472 (2021/22)); All businesses that used Webinars and that exported in the last 12 months (n=102 (2022/23), n=382 (2021/22)); All businesses that used Webinars and that won at least one overseas business contract in the last 12 months (n=80 (2022/23), n=291 (2021/22)); All businesses that used Webinars and that won at least one overseas business contract with the help of DBT (n=29 (2022/23), n=84 (2021/22))

Description: Flow chart showing how the proportion of overseas contracts won with DBT help is calculated. These findings are described in detail earlier in this chapter.

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 DBT 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 DBT for these new overseas sales contracts.

In line with previous waves, businesses that answered ‘yes’ to questions QContractService³⁵ or QContractDBT³⁶ were asked a series of questions about the impact of DBT services on their new overseas business contracts. Businesses that answered ‘no’ were not asked about the levels of assistance given by DBT 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 DBT help on their ‘export sales’.

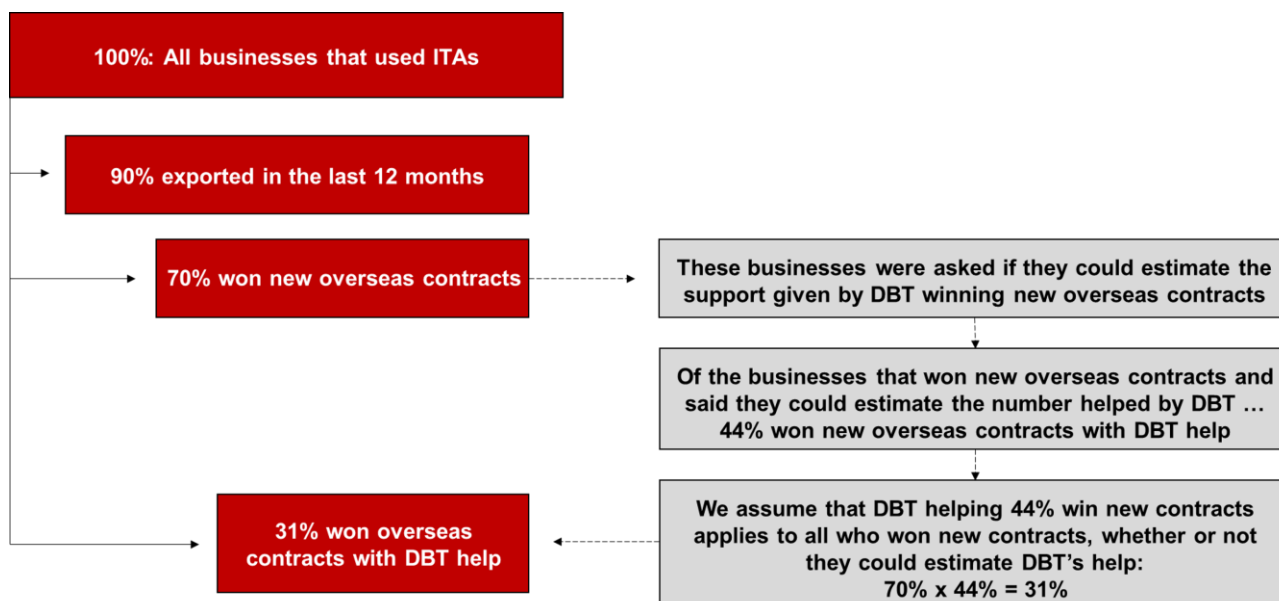
In order to calculate data based on the proportion of all businesses that DBT helped win any new overseas business contracts, an additional calculation was necessary. The assumption was made that the proportion of businesses helped by DBT was the same for those that could provide an estimate as it was 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 DBT and that had won any as a result of DBT help. If the respondent said “No – DBT made no impact”, they were given a response of 0 contracts helped by DBT. Chart 5.1 shows the process.

³⁵ 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 service?

³⁶ If the answer to QContractService above was not “Yes” the respondent was asked QContractDBT: 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 DBT?

Chart 5.1: Process for calculating the proportion of businesses that won new overseas contracts with DBT help (using a hypothetical example)



Description: Flow chart showing how the process for calculating the proportion of businesses that won new contracts overseas with DBT help, using a hypothetical example. The main findings were presented in the text preceding the chart.

Department for Business and Trade

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