Department for Business & Trade

Export Client Reported Impact Survey for Businesses Supported April 2023 to March 2024

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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 businesses' perceptions of the quality of support and advice provided by DBT
- Provide a measure of self-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, unless specified otherwise. The findings are based on 1,286 interviews conducted by Ipsos UK with businesses who used a DBT service between April 2023 and March 2024 (2023/24). 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 2023/24 compared to RIS 2022/23, 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 Export status and DBT help

Around three quarters of businesses (76%) that used a DBT service fell into the sustain segment at the time of the service delivery (QS), this was 81% in the RIS 12 months later. Some 3% of businesses fell into the reassure segment at the time of the service delivery (QS), 5% in the RIS. Finally, 16% of businesses were in the promote segment at the time of the service delivery (QS), 11% in the RIS.

In the QS businesses were given a Net Promoter Score (NPS). NPS is a summary measure of how likely it is that businesses would recommend using a service or product. Around half of businesses were Promoters (51%) and two in ten businesses were Detractors (20%), which was in line with QS 22/23 (50% and 22% respectively). The overall Net Promoter Score (NPS) saw an increase in QS 2023/24 (+30) compared to QS 22/23 (+28).

In terms of direct impacts from using DBT services, a third of businesses (32%) reported they had won export contracts with the help of DBT, this is lower than the 38% that reported this in the 22/23 wave. Other changes expected or seen from engaging with DBT services included increased or improved skills of existing UK employees (42%), improved job satisfaction of existing UK employees (35%) and safeguarded jobs of existing UK employees (34%).

1.3 Actions taken as a result

More than 8 in 10 businesses (86%) had taken an action following their use of a DBT service. The most frequently taken action by businesses was “identifying new export opportunities or made new contacts” (64%). Among businesses that had made an investment as a result of using a DBT service the most common investment was an increase in marketing and sales activity (81%).

After using a DBT service, 34% of businesses in the RIS reported having no further contact with any other organisations. When a business did report contacting an organisation, this was most often Chambers of Commerce in the UK (33%).

1.4 Reported impact on exporting

Among all businesses that had used DBT support, 64% 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 respondents had won contracts with help from DBT, lower than in RIS 22/23 (38%), Around one in five (19%) reported they had won contracts without help from DBT, higher than in RIS 22/23 (9%).

The median value of the export sales of all new overseas contracts for businesses was £247,556 (compared to £199,184 in 22/23)[1]. The reported additional export sales for DBT services were £97,539 across all contracts that DBT services helped to win (compared to £89,310 in 22/23). 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.

One in five businesses (21%) said they had either been exposed to, or had started doing business in, at least one new market as a result of using a DBT service. Around 8 in 10 (78%) said they had not started doing business or been exposed to any new markets.

The most common new markets for increased exposure or business were Asia (including Australia and New Zealand) (48%) and Europe (45%), followed by the Middle East (39%). Compared to the previous year, the percentage of businesses reporting they had increased exposure of business with the Middle East has increased (39% in 23/24 versus 28% in 22/23).

The most frequently cited barrier to exporting in the RIS 2023/24 was ‘access to contacts, customers and the right networks’ (39%), followed by ‘cost’ (37%). A third of businesses (34%) reported ‘time taken to comply’ as a barrier. A quarter of businesses reported ‘lack of knowledge’ (26%) and ‘The capacity of your business to export and cater for international contracts’ (24%) as barriers.

[1] Values are self-reported and not adjusted for inflation.

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 (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 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 annual surveys known as the Export Client Survey (ECS). The main aims of the ECS are to:

- Track businesses' 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. This report does not contain all metrics from the RIS survey, but instead comprehensively covers key findings of interest.

The findings in this report are based on 1,286 interviews conducted by Ipsos UK with businesses who used a DBT service between April 2023 and March 2024 (2023/24). In this report, when findings from 2023/24 are compared to findings from the 2022/23 survey, or when findings from the RIS 2023/24 are compared to findings from the QS 2023/24, these are statistically significant at the 95% confidence level.

2.3 Sample frame and fieldwork

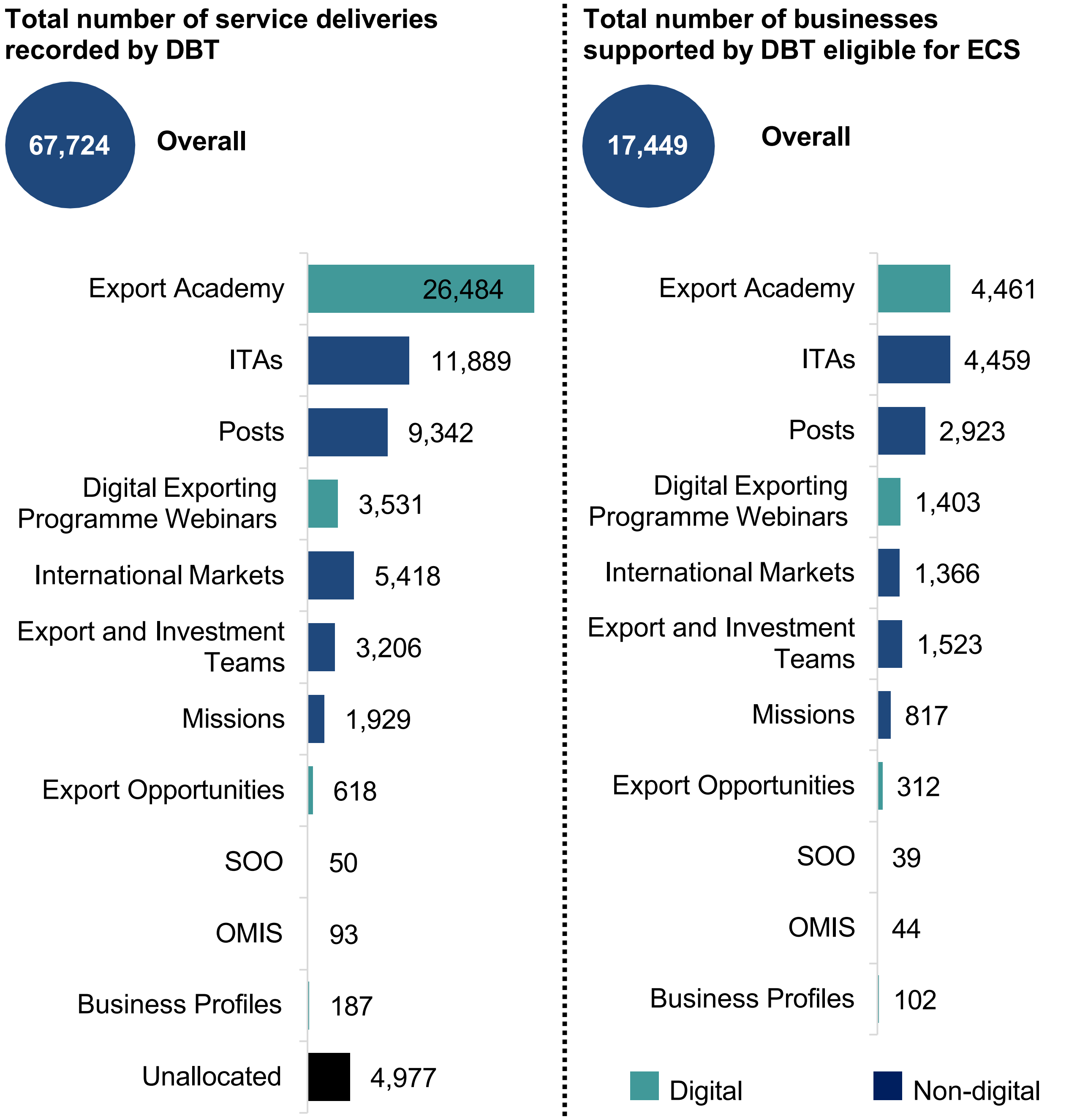
Table 2.3.1 below provides an overview of the services that DBT provides which are in scope of this research:

Table 2.3.1: DBT export promotion services

Service	Service description	Digital or non-digital	Sample size
International Trade Advisers (ITAs)	Provides businesses with impartial face-to-face advice, to help them to identify the services and support they need to grow internationally.	Non-digital	711
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	303
Export and Investment Teams (E&I 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	186
International Markets (IM)	Provides information and advice to small and medium-sized businesses looking to export to particular overseas markets.	Non-digital	184
Missions	Services related to events (trade fairs and market research) but with a specific focus on face-to-face deal-making.	Non-digital	121
Export Academy	Gives businesses the know-how to sell to customers around the world by learning from experts in international trade.	Digital	697
Digital Exporting Programme Webinars (Webinars)	Aim to provide information to a target audience, ranging from experienced exporters to businesses that are new to exporting.	Digital	193
Export Opportunities (ExOpps)	An online service on great.gov.uk which promotes global exporting opportunities to UK businesses	Digital	33
Business Profiles	An online service which enables businesses to promote products and services to international buyers.	Digital	18
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	4

In total, there were 67,724 recorded service deliveries related to the services covered by the ECS between April 2023 and March 2024. From these records, 17,449 individual unique businesses were supported through all the services covered by the ECS in this period. It was agreed with DBT to remove the eight businesses interviewed in the QS about their use of the Overseas Market Introduction Service (OMIS) from the RIS sample. This was due to issues identified retrospectively regarding the timelines of the OMIS support provided. As such, OMIS is included in Chart 2.3.2 below but excluded from Table 2.3.1 above and all subsequent chapters.

Chart 2.3.2: Service deliveries recorded and businesses supported, by service type (April 2024 to March 2025)[2]



Description: One chart shows the total number of service deliveries recorded which is 67,724 overall. The Export Academy had the highest number of service deliveries recorded (26,484) followed by ITAs (11,889) and Posts (9,342). The second chart shows the total number of businesses supported and eligible for ECS which is 17,449 overall. The Export Academy supported the highest number of businesses (4,461), followed by ITA's (4,459) and Posts (2,923).

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[2] A total of 4,977 service deliveries could not be allocated to any of the services shown here that form part of the ECS when Ipsos applied the eligibility mapping criteria provided by DBT. For further details of the sampling preparation process and checks, please refer to the Quality Survey technical report.

3 Methodology

3.1 Sample design

The Export Client Survey (ECS) involves two 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 2024 (interviewing businesses that received support from DBT in April 2023 and participated in the Quality Survey in July 2023). This report covers DBT services delivered between April 2023 and March 2024. 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).[3] 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. No significant differences were identified.

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)[4]

DBT Product or Service	All QS businesses (% satisfied)	All RIS businesses (% satisfied)
International Trade Advisers (ITAs)	80% [+/- 3%]	80% [+/- 4%]
Export Academy	72% [+/- 3%]	73% [+/- 5%]
Posts	76% [+/- 4%]	75% [+/- 7%]
Digital Exporting Programme Webinars	72% [+/- 5%]	67% [+/- 8%]
Overall	74% [+/- 2%]	75% [+/- 2%]

[3] 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.
[4] Only services with a RIS base size of 100 or higher are included in this table.

3.2 Response rates

Table 3.2 shows response rates achieved during fieldwork between April 2024 and March 2025. Table 3.2.1 breaks this down by DBT product or service.

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 70% response rate for interviews conducted between April 2024 and March 2025.

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

Table 3.2.1: Fieldwork outcomes April 2024 to March 2025

Fieldwork outcomes	Number of cases (N)
Number of cases issued	2,450
Live sample not interviewed	300
Deadwood (uncontactable)	614
Refusal	250
Completed interviews	1,286
Response rate	70%

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

Outcome	ITAs	Missions	Posts	E&I Teams	Webinars	ExOpps	Business Profiles	Export Academy	IM	SOO
Number of cases issued	711	121	303	186	193	33	18	697	184	4
Live sample not interviewed	91	16	39	23	20	2	1	80	27	1
Deadwood	165	38	88	51	50	9	2	167	43	1
Refusal	65	6	21	20	17	5	4	87	24	1
Complete	390	61	155	92	106	17	11	363	90	1
Response rate	71%	73%	72%	68%	74%	71%	69%	68%	64%	33%

3.3 Analysis

Several questions in the survey ask respondents to give a rating using a scale from 0 to 10, where 10 was the most positive response and 0 was the least positive response. Responses have been grouped into positive (a score of seven or higher), neutral (a score of four to six), and negative (a score of three or below). Respondents could also say ‘Don’t know’ or ‘Not applicable’.

Respondents who said the question did not apply to them were excluded from the analysis. Those who answered ‘Don’t know’ or ‘Refused’ are included in the 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 will not give an exact representation of the ‘true’ average in the population. When we estimate a population parameter from a survey sample, we use confidence intervals to quantify the uncertainty of only sampling a subset of the population. A 95% confidence interval is a margin of error around an estimate, 95% of confidence intervals will contain the true mean. For example, Chart 4.1 below shows 86% of businesses in 2023/24 reported having taken action as a result of receiving the DBT service with a CI of +/- 2%, so the true value is between 84% and 88%.

In addition, charts and tables represent a statistically significant increase from RIS 2022/23 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 2023/24 and the RIS 2023/24. These are shown using triangle-shaped arrows. See Table 3.3.1 for a guide to the symbols used in the charts.

Table 3.3.1: Fieldwork outcomes April 2023 to March 2024 (by service)

Symbol	Meaning
⬆	Statistically significant increase
⬇	Statistically significant decrease
–	No change
▲▼	Statistically significant changes between QS 23/24 and RIS 23/24

In addition, where the results for one group of businesses are compared with the results for another group, any differences discussed in the text are statistically significant at a 95% significance level, unless otherwise stated. This means that there is a 5% chance that we have reported a significant difference where in fact there was none.

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 Actions taken as a result of using DBT services

Businesses were asked about any actions they had taken as a direct result of their use of DBT services (Chart 4.1). More than 8 in 10 businesses (86%) had taken an action following their use of a DBT service. The most frequently taken actions by businesses following their use of a DBT service were: “identifying new export opportunities or made new contacts” (64%), “researching the paperwork and regulations needed to export” (53%) and “starting or increasing exporting” (38%).

Among non-exporters half (51%) of businesses had assessed their readiness to export after using a DBT service.

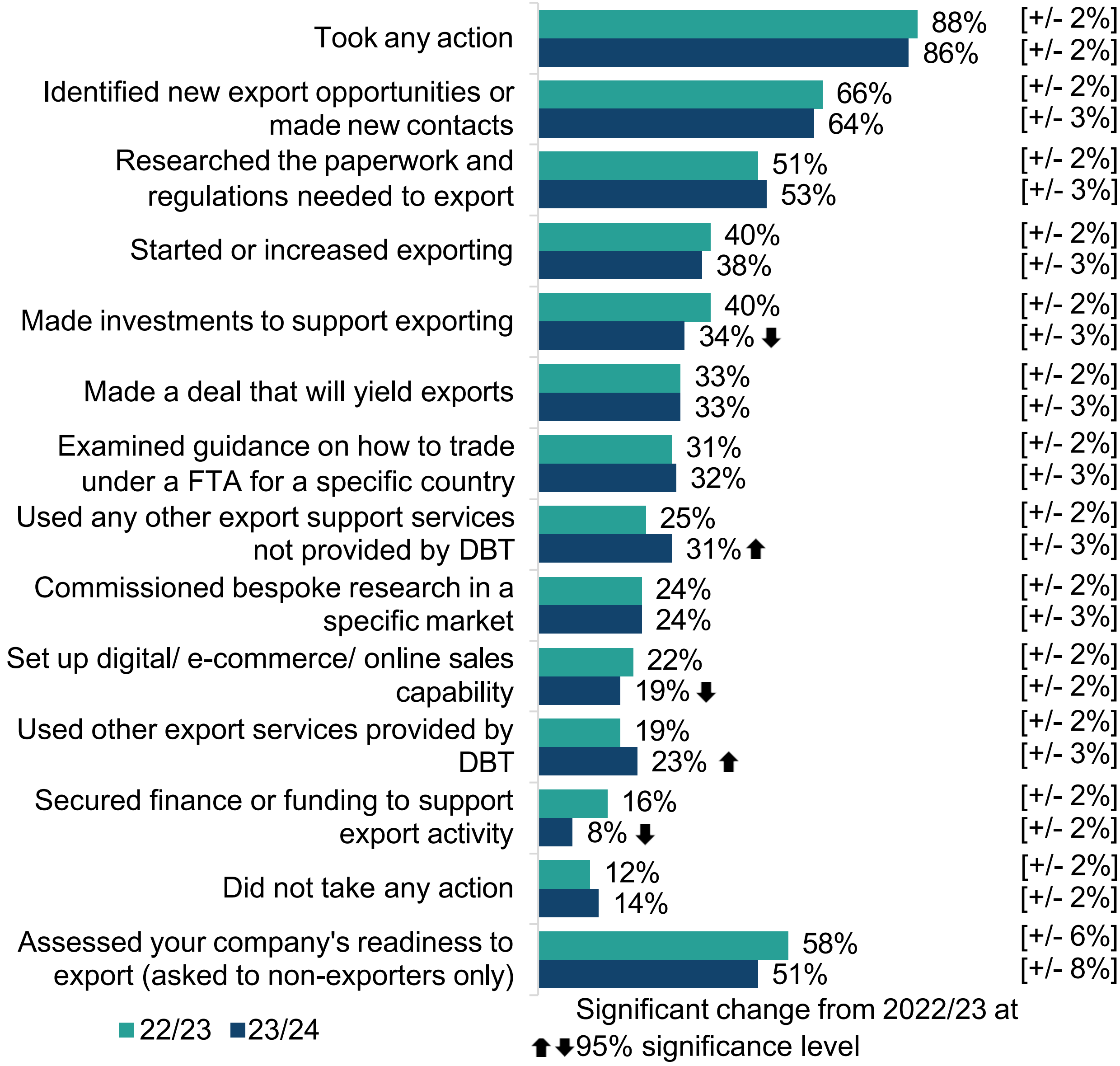
For RIS 23/24 more businesses reported that they had done the following than in RIS 22/23 as a result of using a DBT service:

- used other export services provided by DBT (23% versus 19%)
- used other export support services not provided by DBT (31% versus 25%).

For RIS 23/24 fewer businesses reported they had done the following than in RIS 22/23 as a result of using a DBT service:

- secured finances or funding to support export activity (8% versus 16%)
- made investments to support exporting (34% versus 40%)
- set up digital/ e-commerce/ online sales capability (19% versus 22%).

Chart 4.1 What the business has done as a result of receiving the service

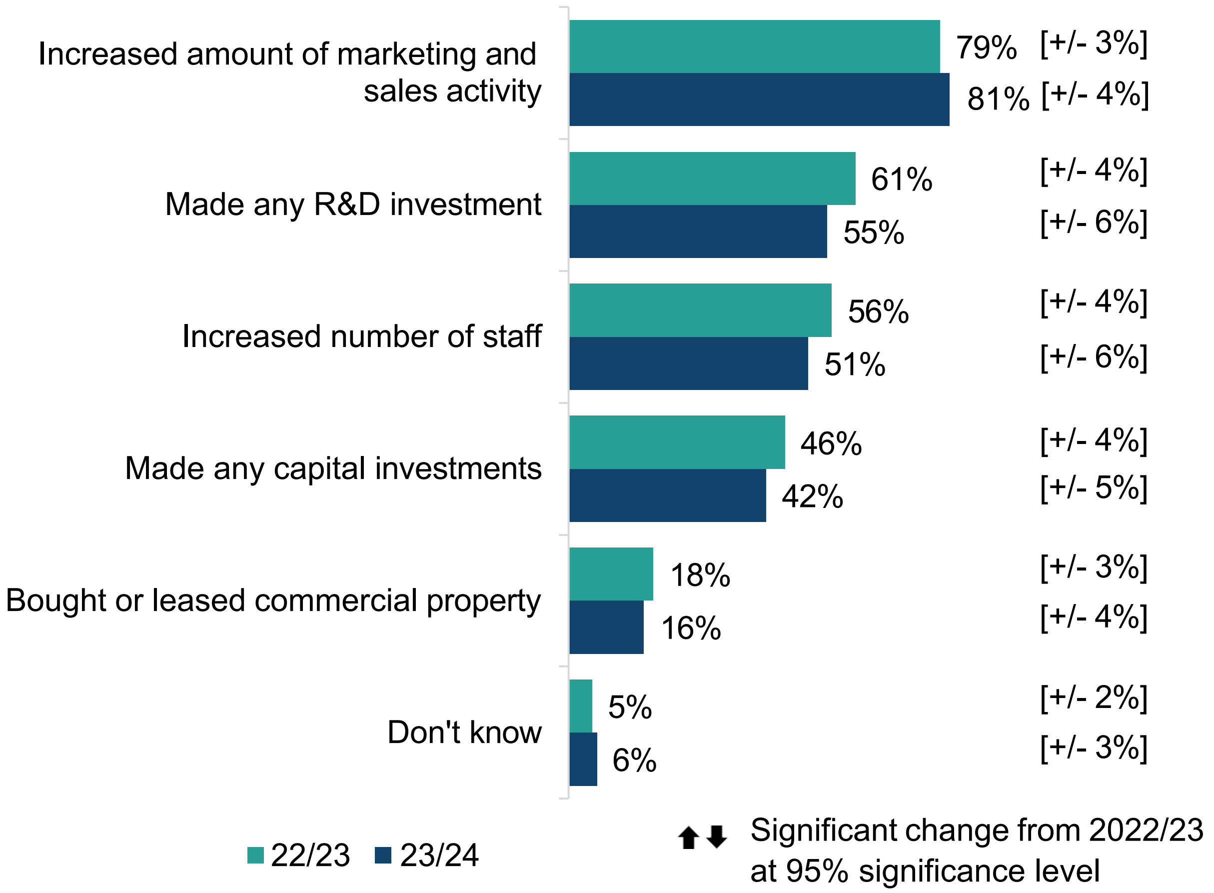


Caption: QResultService: What has your business done as a result of the service? Base: All businesses (n= 1,541 (2022/23), n= 1,286 (2023/24)); All businesses that were non-exporters (n= 288 (2022/23), n= 234 (2023/24))

Description: Chart 4.1 shows there are a few changes from 2022/23 in terms of what the business has done as a result of receiving DBT services, these changes are explained in bullet points above this graph. The chart also shows 86% had taken any action, with the most frequently chosen action remaining 'identified new export opportunities or made new contact' (64%).

Businesses that had made an investment as a result of using a DBT service were asked what investments they had made. The most common answer was an increase in marketing and sales activity (81%), followed by made any R&D investment (55%) and increased number of staff (51%).

Chart 4.2 Type of investments made to support new or increased export opportunities following using DBT services



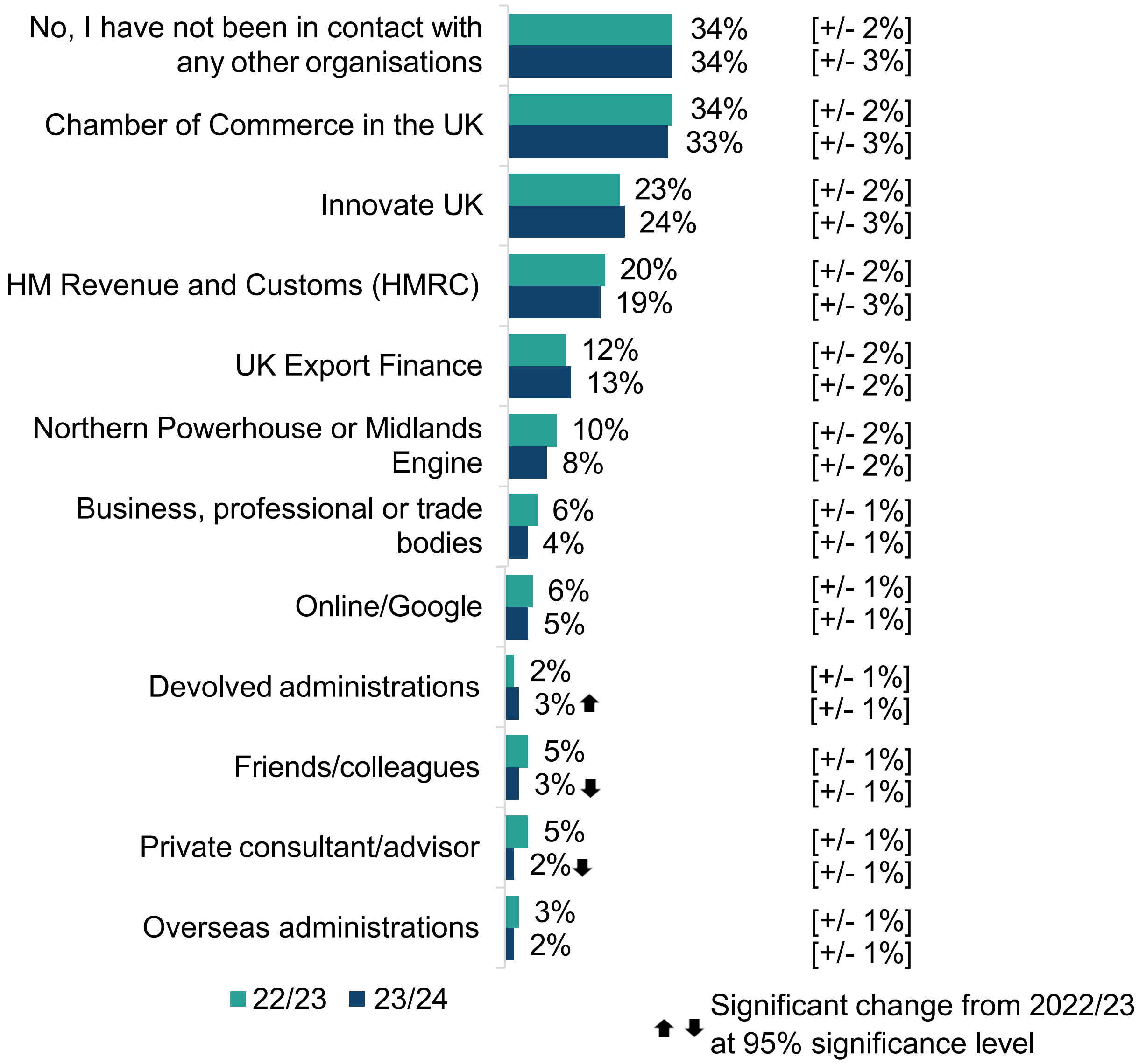
Caption: QInvestmentMade: Which of the following investments has your business made to support new or increased export opportunities? Base: All businesses that made investments to support exporting as a result of using DBT services (n=442 (2023/24), n=613 (2022/23)).

Description: Chart 4.2 shows there were no changes from 2022/23 in terms of type of investments made to support new or increased export opportunities following using DBT services. The most frequently chosen options remained 'increased amount of marketing and sales activity' (81%), followed by 'made any R&D investment' (55%) and 'increased number of staff' (51%).

In RIS 23/24, when asked what organisations they had been in contact with after using DBT services, 34% of businesses reported having no further contact with any other organisations, which was the most chosen answer (see Chart 4.3). When a business did report contacting an organisation, this was most often Chambers of Commerce in the UK (33%). From RIS 22/23 to 23/24 there was little change in terms of which organisations were contacted.

Actions taken as a result of using DBT services

Chart 4.3 Organisations businesses have been in contact with since receiving the service



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 (n=1,286 (2023/24), n=1,541 (2022/23)). Coded responses with 2% or more in 2023/24 are included.

Description: Chart 4.3 shows that there is little change from 2022/23 in terms of with which organisations businesses have been in contact. The most frequently chosen options remained "No contact with any organisations" (34%), followed by Chambers of Commerce in the UK (33%) and Innovate UK (24%).

5 Reported impact on exporting

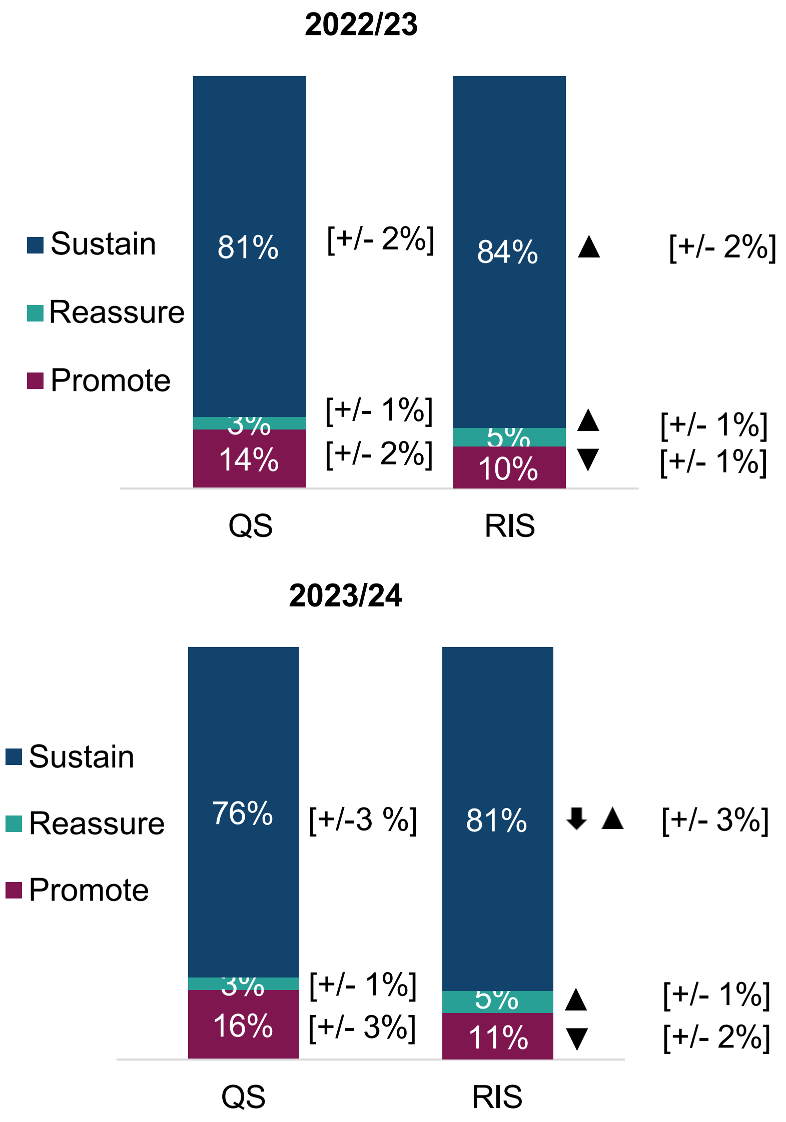
Businesses that used a DBT service were asked about their export status. QS asks businesses what their export status was at the time of using the service and RIS asks about their export status 12 months after that. Responses from those who took part in both surveys were analysed to see whether the export 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 5.1). These segments include:

- **Sustain:** refers to current exporters, defined as UK businesses that have exported goods or services in the past 12 months. Around three quarters of businesses (76%) that used a DBT service fell into this segment at the time of the service delivery (QS 2023/24). This was higher in the RIS 12 months later (81%). Businesses that used the ITAs service were more likely to be classified as Sustain in RIS 23/24 (86% versus the average for RIS 23/24 (81%).

- **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 DBT service users, 3% fell into this segment at the time of the service delivery (QS 2023/24), and this increased 12 months later in the RIS (5%). Business that used the Export Academy service were more likely to be in the Reassure category in the RIS (7% versus the total 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. Some 16% of businesses that used DBT services were in this segment at the time of the service delivery (QS 2023/24). This was slightly lower 12 months later (11%). Business that used the Export Academy service were more likely to be in the Promote category in the RIS (15% versus the total 11%).

Chart 5.1 Exporter status at time of the service delivery (Quality Survey) and 12 months later (RIS)



Sustain = current exporters

Reassure = exported before but not in the last 12 months

Promote = not exported before

⬆⬇ Significant change from RIS 2022/23 at 95% significance level

▲▼ Significant change from the QS 2022/23 or 2023/24 at 95% significance level

Caption: Source: Composite measure merging data from several variables. Base: All businesses that used DBT services and completed both surveys (n=1,286 (2023/24), n=1,541 (2022/23)).

Description: Chart 5.1 shows that the percentage of businesses in the Sustain segment for RIS 2023/24 has decreased compared to 2022/23. Decreasing from 84% in RIS 2022/23 to 81% in RIS 2023/24. The percentage of businesses in the Reassure and Promote categories show little change from RIS 2022/23.

The export status of some businesses changed between the time of the service delivery and 12 months later in the RIS (see Table 5.2 and Chart 5.3).

Around six in ten (59%) businesses from the Reassure segment moved to Sustain, and 3% of businesses in the Sustain segment moved to Reassure. These findings were in line with the previous year (RIS 2022/23).

Table 5.2 Change in export status at time of the service delivery (QS) and 12 months later (RIS)

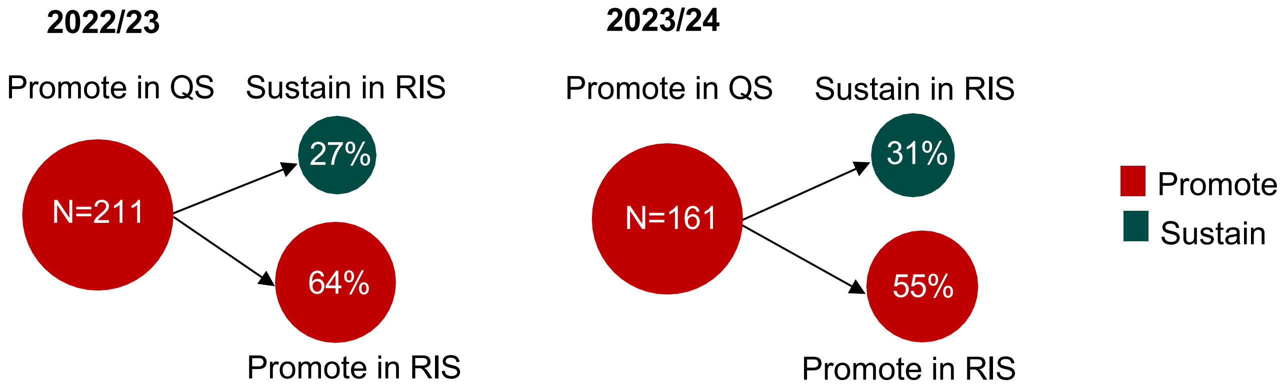
Quality Survey Export status	RIS Export status	Percentage	Change since 2022/23
Sustain (n=1,041)	Sustain	**94%** [+/- 1%]	-
-	Reassure	**3%*** [+/- 1%]	-
-	Promote	*** [+/- %]	-
Promote (n=161)	Sustain	**31%** [+/- 7%]	-
-	Reassure	**7%**** [+/- 4%]	-
-	Promote	**55%** [+/- 8%]	-
Reassure (n=42)[5]	Sustain	*** [+/- %]	-
-	Reassure	*** [+/- %]	-
-	Promote	*** [+/- %]	-

Caption: 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

Description: Table 5.2. shows the percentage of businesses that moved from the Sustain or Promote segment in the QS survey to the Sustain, Reassure and Promote segments in the RIS survey. 94% of businesses in the Sustain segment in QS remained in the Sustain segment in RIS, 3% moved to Reassure. Among the businesses in the Promote segment in QS, 55% remained in the Promote segment in RIS, 31% moved to Sustain and 7% to Reassure. These findings were in line with the previous year.

[5] Respondent base sizes too low to display percentages for “Reassure”.

Chart 5.3 Changes in “Promote” export status reported at time of the service delivery (Quality Survey) and 12 months later (RIS)



Caption: 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.

Description: Chart 5.3 shows the percentage of businesses that moved from Promote segment in the QS survey to the Sustain segment or remained in the Promote segments in the RIS survey. Among the businesses in the Promote segment in QS, 55% remained in the Promote segment in RIS, 31% moved to Sustain. These findings were in line with the previous year.

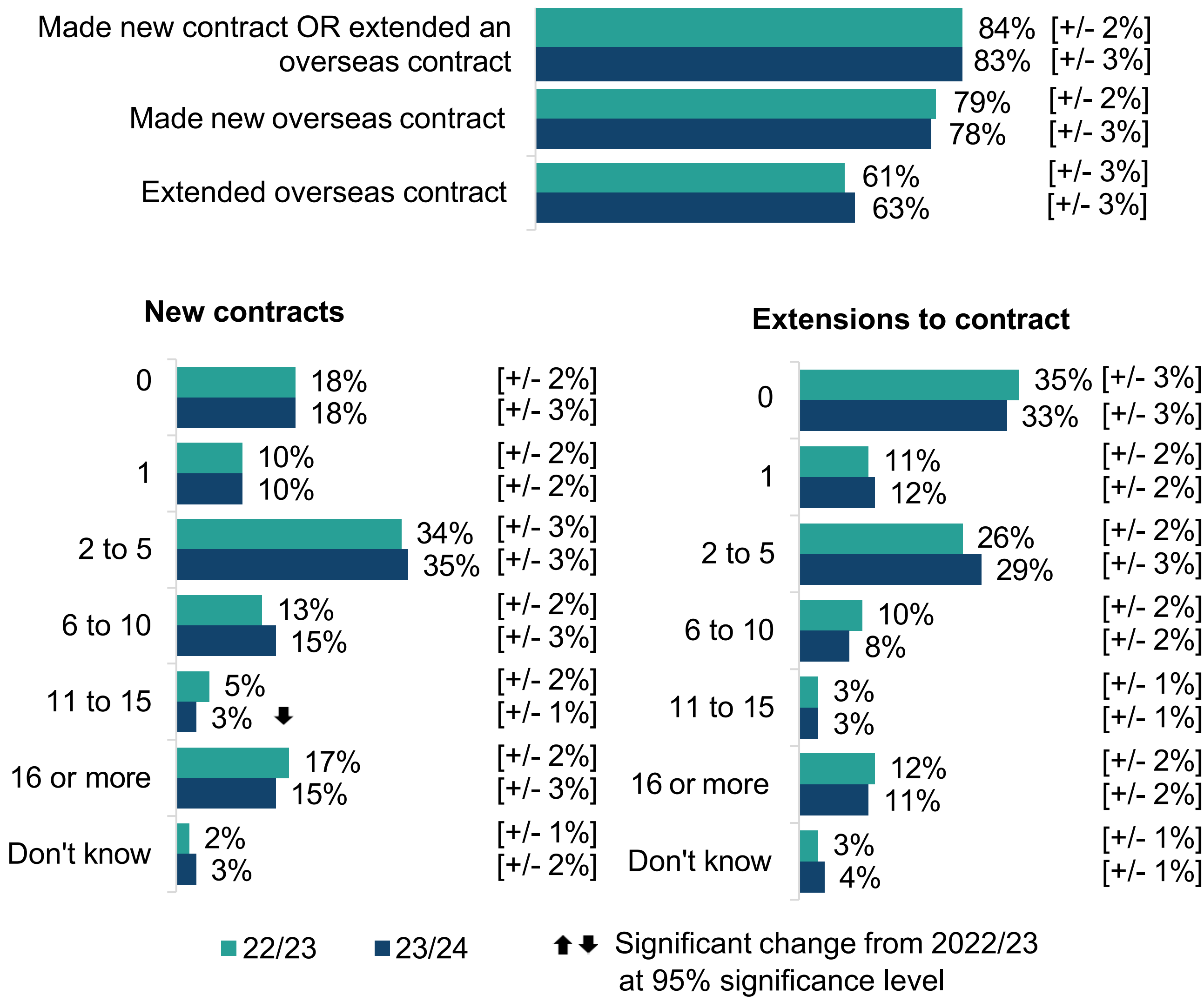
6 Reported export contracts achieved since receiving the service

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 a service. Businesses were asked to think about all contracts, not just those assisted by the service or DBT.

Among the businesses that were exporting or had exported in the previous 12 months, 83% 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 6.1). This was in line with the RIS 2022/23 (84%).

Looking at individual services, businesses that had used the ITAs service were more likely to report that they had made new overseas contracts (86% versus 78% average). Businesses that used the Export Academy service were more likely to report they had not won any new contracts (27% versus 18% average). This broadly fits with overall trends regarding digital and non-digital services, where users of digital services were more likely to report making new overseas contracts (85%) than users of non-digital services (69%).

Chart 6.1 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



Caption: QNewcontract: How many new overseas business contracts for export sales did you win in the past year? Base: All businesses that 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=1,087 (2023/24), n=1,297 (2022/23)). QExtendcontract: How many extensions to existing overseas business contracts for export sales did you win in the past year? Base: All businesses that were currently selling, or had previously sold goods or services overseas in the previous 12 months (n=1,073 (2023/24), n=1,281 (2022/23))

Description: Chart 6.1 shows that there were no statistically significant changes from 2022/23 in terms of the percentage of businesses that had made new overseas contracts (78% in 2023/24), extended overseas contracts (63% in 2023/24) or both (83% in 2023/24). Chart 6.1 also shows overall there were no changes from 2022/23 in the number of new contracts or contract extensions businesses won, apart from fewer businesses reporting they had won 11 to 15 new contracts (3% in 23/24 versus 5% in 22/23).

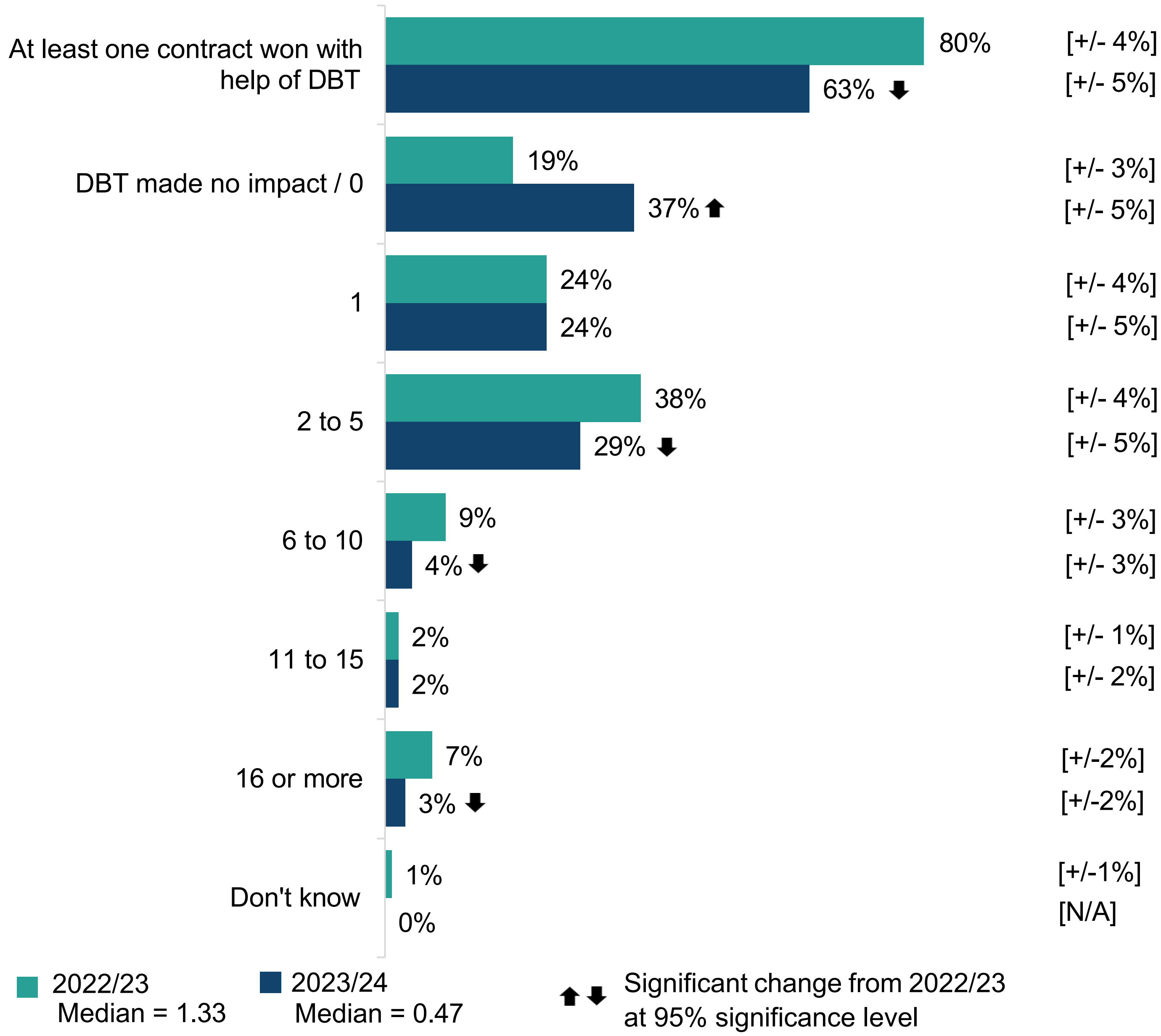
Reported export contracts achieved since receiving the service

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 a service were asked whether they could estimate the number of contracts won with the assistance of DBT services. In total, 45% of businesses felt able to provide an estimate and were surveyed about their experiences.

As shown in Chart 6.2, nearly two thirds of these businesses (63%) said they had won at least one new overseas sales contract with the help of DBT, a median of 0.47 contracts per business. This is lower than in 22/23 when 80% of businesses said this, and median contracts won were 1.33. In 23/24 over a third of businesses (37%) reported that DBT had no impact, higher than in 22/23 (19%).

Chart 6.2 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)



Reported export contracts achieved since receiving the service

Caption: QContractDIT: Are you able to estimate the number and value of new overseas business contracts you won that were helped by the support received from all your interactions with DBT? QContractNumber: How many new overseas contracts were won with help from DBT? Base: All businesses that were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (n=432 (2023/24), n=493 (2022/23)). Median values include zero.

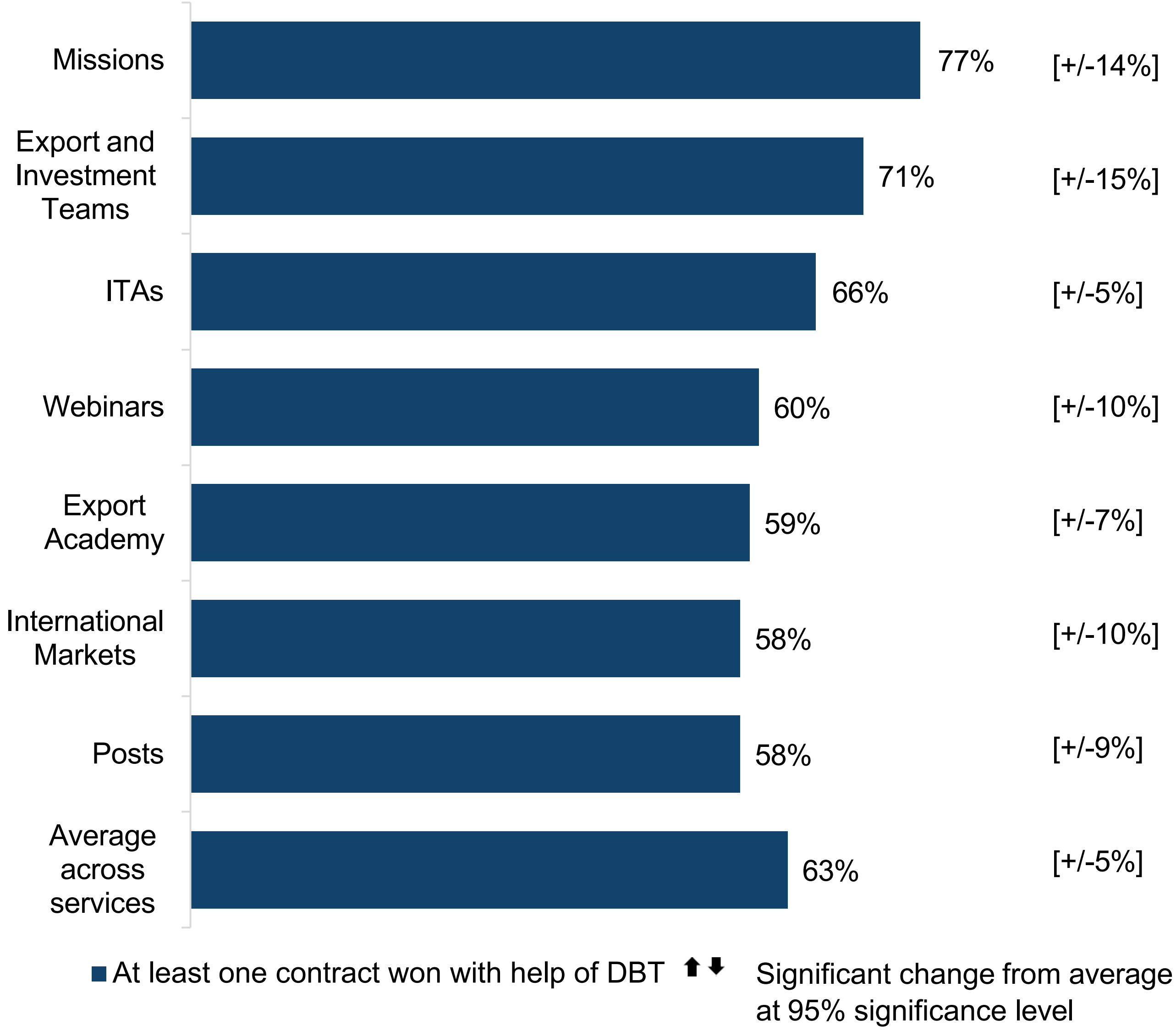
Description: Chart 6.2 shows that fewer businesses reported they had won at least one overseas contract with the help of DBT at 63% down from 80% in 22/23. More businesses reported DBT made no impact (37%, up from 19% in 22/23). Fewer businesses in 23/24 reported they had won: 2-5 contracts (29% versus 38%), 6-10 contracts (4% versus 9%) or 16 or more contracts (3% versus 7%).

Results per service are broken down in Charts 6.3 and 6.4. As shown in 6.3, there were no statistically significant variations between users of different DBT services amongst those who had won at least one contract with the help of DBT. However, Chart 6.4 shows that users of ITAs were more likely to report winning two to five new contracts, at 35%, versus an average of 29%, and 0% of Webinar users reported winning six or more contacts, a statistically significant difference versus the average of 9%.

We used these results to estimate the overall proportion of businesses that won new overseas contracts with help from DBT (Chart 6.5). Among all businesses that had used DBT support, 64% 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 respondents had won contracts with help from DBT, lower than in 22/23 (38%). Around one in five businesses (19%) said they had won contracts without help from DBT, higher than in 2022/23 (9%).[6]

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

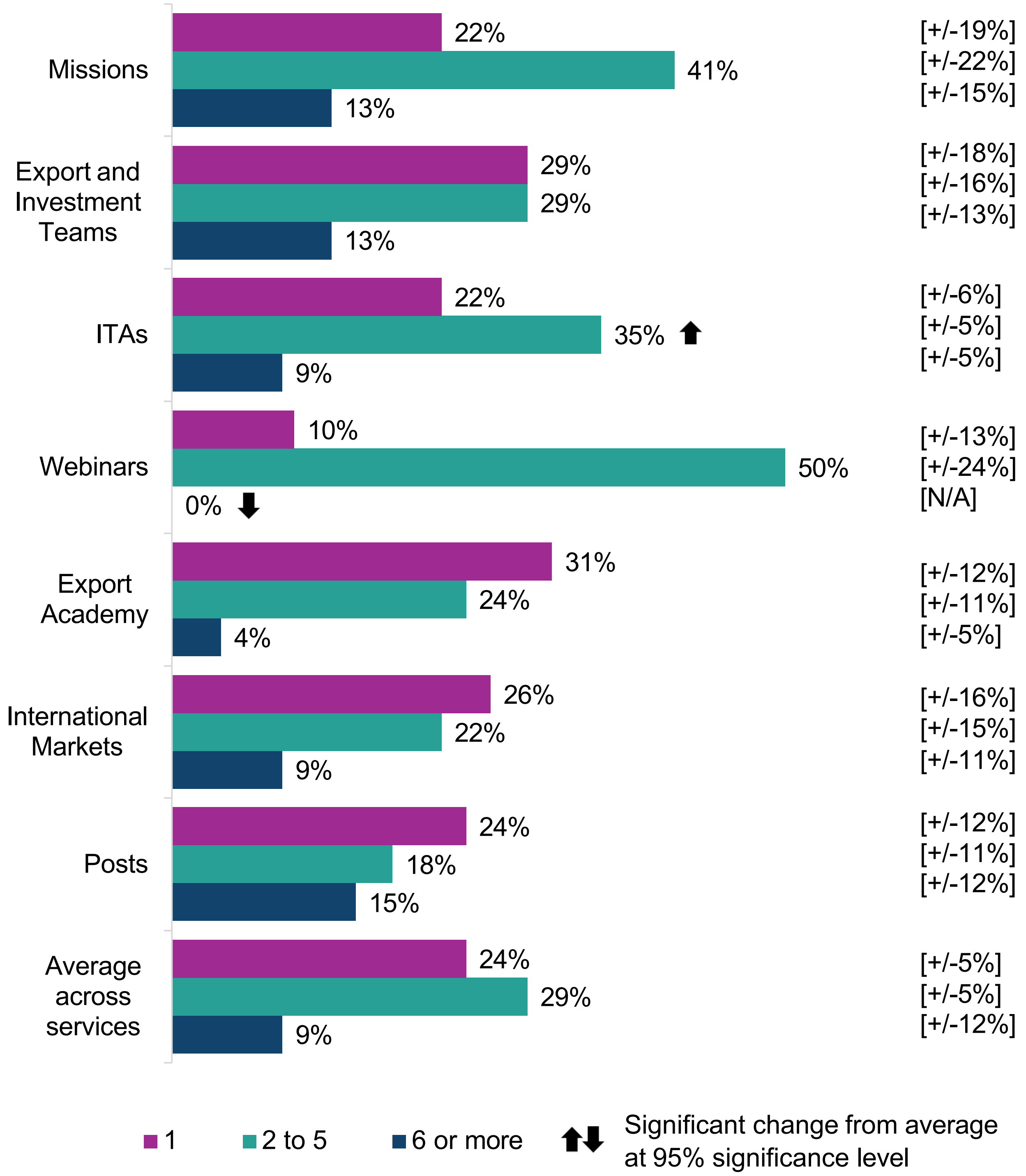
Chart 6.3 Number of new overseas contracts, by service, said to be won with the help of DBT in the last 12 months (including those who said DBT made no impact)



Caption: QContractNumber: How many new overseas contracts were won with help from DBT? Base: All businesses that were able to estimate the number and value of new overseas business contracts that they won in the last 12 months (n=432), ITAs (n=166), Posts (n=63*), E & I Teams (n=38**), International Markets (n=32**), Missions (n=24**), Webinars (n=25**), Export Academy (n=76*). *Small base size; **Very small base size.

Description: Chart 6.3 compares businesses that said they had won at least one contract with DBT's help, broken down by service.

Chart 6.4 Number of new overseas contracts, by service, said to be won with the help of DBT in the last 12 months (including those who said DBT made no impact)

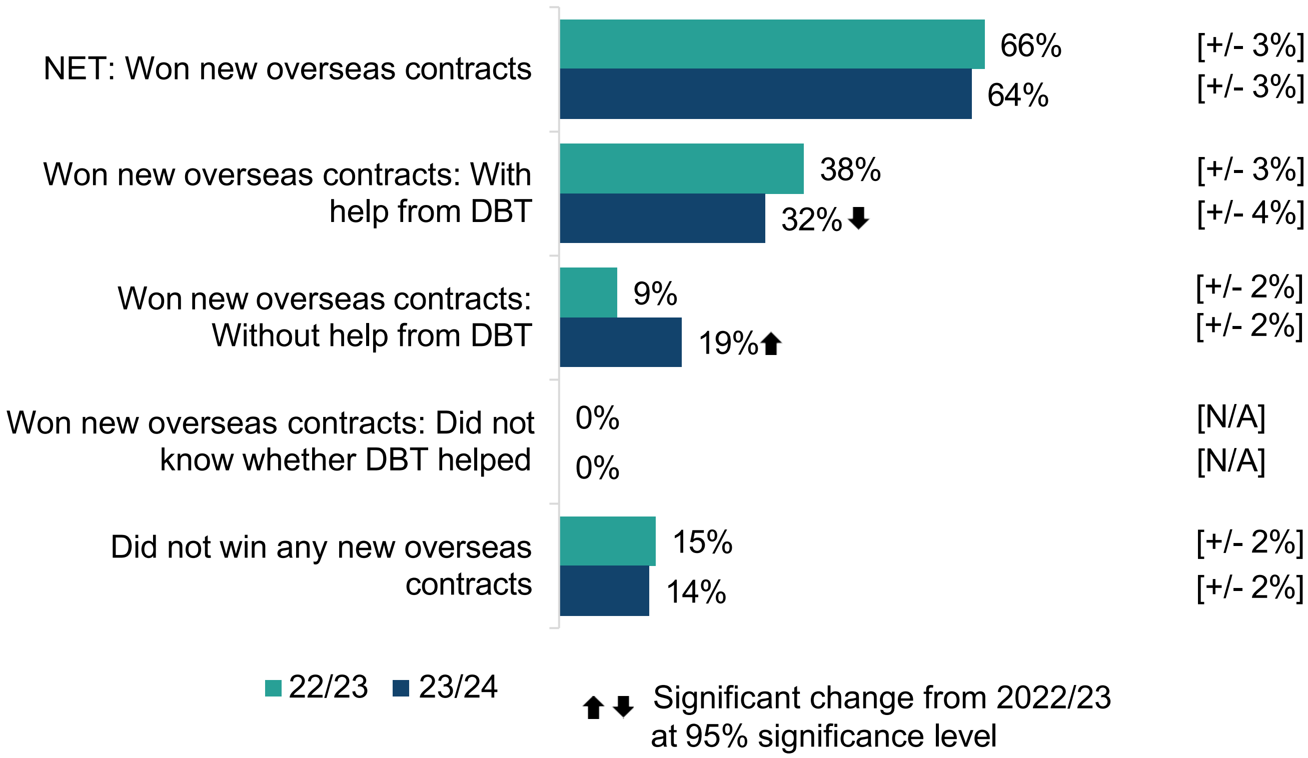


Caption: QContractNumber: How many new overseas contracts were won with help from DBT? Base: All businesses that were able to estimate the number and value of new overseas business contracts that they won in the last 12 months using help from DBT (n=432), ITAs (n=166), Posts (n=63*), E & I Teams (n=38**), International Markets (n=32**), Missions (n=24**), Webinars (n=25**), Export Academy (n=76*). *Small base size; **Very small base size.

Reported export contracts achieved since receiving the service

Description: Chart 6.4 shows that whilst most services tend to help businesses win one new contract in 10-30% of cases, Webinars helped over half of businesses win new contracts in over half (51%) of cases. Missions did the same in 41% of cases and ITAs was significantly above average at 35%.

Chart 6.5 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



Caption: Source: Composite measure merging data from several variables.
Base: All businesses (n=1,286 (2023/24), n=1,541 (2022/23)). Base: All businesses that won any new overseas contracts in the past year (n=850 (2023/24), n= 1,022 (2022/23)).

Description: Chart 6.5 shows that fewer businesses reported they had won overseas contracts with help from DBT, 32% in 23/24 versus 38% in 22/23. The chart also shows more businesses reported they had won new overseas contracts without DBT, 19% in 23/24 versus 9% in 22/23. There were no changes in the proportion of businesses that had won a new contract (64% in 23/24 and 66% in 22/23) or the proportion that did not win any new contracts (14% in 23/24 and 15% in 22/23).

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. Exporting businesses that said DBT made no impact or did not help them win any new contracts were not asked this question. However, these businesses have been included under

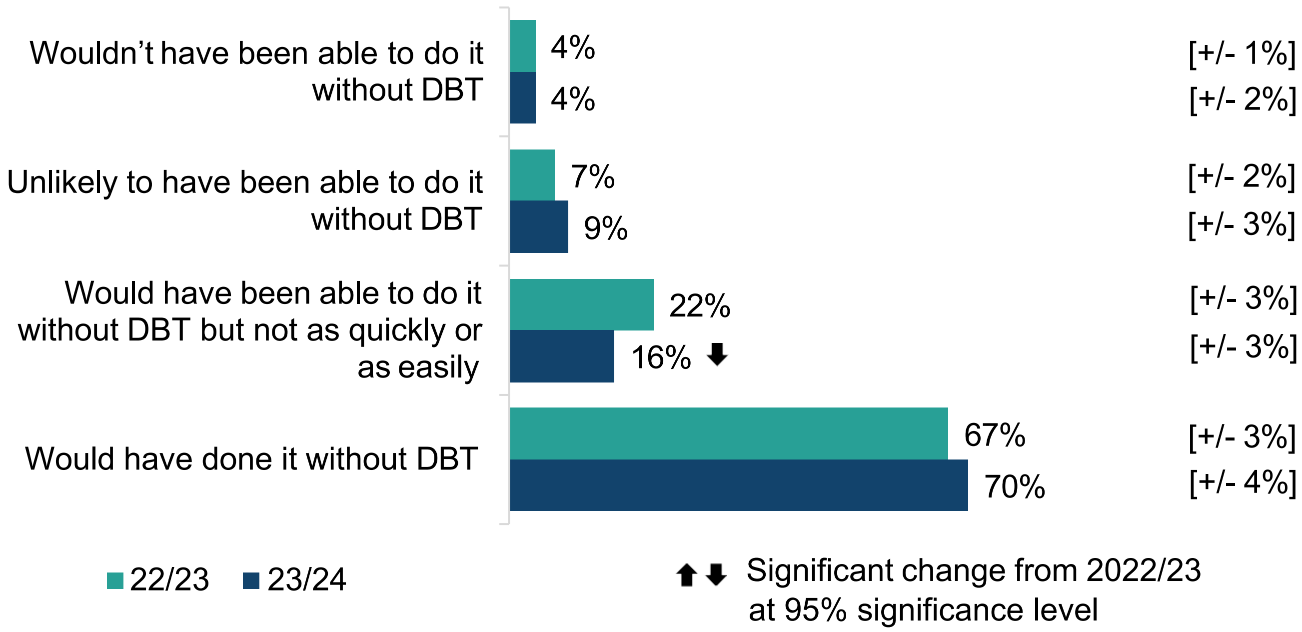
'Would have done it without DBT' to better understand the level of support that DBT provided (Chart 6.6).

Just under 3 in 10 businesses (29%) reported that DBT support was important to some extent in helping them win these contracts. This includes 4% that said they would not have been able to do it without DBT, and 9% that said it was unlikely they could have done it without DBT. Just under a fifth (16%) thought they would not have been able to do it as quickly or easily without DBT support (Chart 6.6). The remaining 70% thought they would have been able to achieve the same outcome without DBT support.

Businesses that used the Export Academy were more likely to report being able to win overseas contracts without DBT support (80% versus 70% average).

When breaking down services between those that are all-digital, such as Export Academy, and those that are non-digital, 79% of users of digital services said they would have won new contracts without DBT help. Users of non-digital services appear to more often found these essential to winning new business, with only 65% saying they would have would new business without DBT help.

Chart 6.6 How important DBT's help was in winning overseas contracts



Caption: QContractHelp: How important was DBT's help in winning these overseas contracts? Base: Base: All firms that won at least one overseas business contract with the help of (n=850 (2023/24), n=1,022 (2022/23))

Description: Chart 6.6 shows 70% of businesses reported they would have been able to win overseas contracts without DBT. Fewer businesses reported they would have been able to win these contracts without DBT but not as quickly (16% in 23/24 versus 22% in 22/23). There was no change in the proportion of businesses that said they would not have been able to (4% for both 22/23 and 23/24) or would have been unlikely to (9% in 23/24 and 7% in 22/23) win these overseas contracts.

Reported export contracts achieved since receiving the service

7 Reported value of export sales achieved since receiving the service

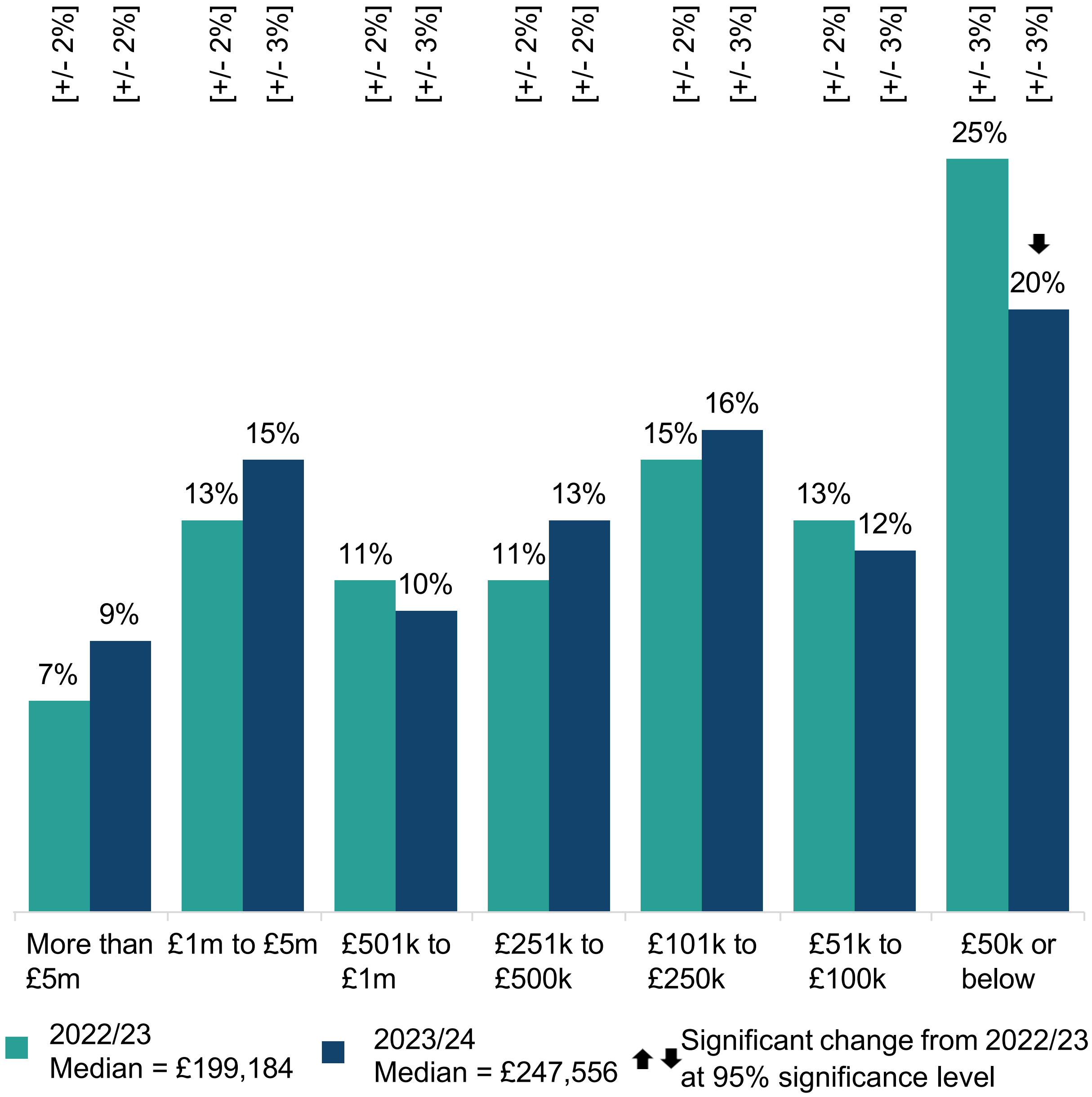
The 64% of businesses that had won new overseas contracts (excluding extensions to existing contracts) were also asked about the value of export sales of those contracts, in total. The majority (94%) of this group provided an estimate of the value of these contracts.

The median value of the export sales of all new overseas contracts for these businesses was £247,556 (compared to £199,184 in RIS 2022/23 and £286,727 in RIS 2021/22)[7]. As shown in Chart 7.1, a fifth of businesses (20%) had achieved export sales of £50,000 or below, this is lower than for 22/23 which was 25%. A quarter of businesses (24%) reported that the export sales value of the new overseas contracts won was more than £1 million.

Looking at differences between the services, businesses that used the Export Academy service were more likely to have achieved export sales of up to £50,000 (31% versus 20% average). Businesses that used the Posts service were more likely to have achieved export sales worth more than £5 million (18% versus 9% average).

[7] Values are not adjusted for inflation, self-reported by businesses and not validated against verified financial data.

Chart 7.1 Value of all new overseas contracts made in previous 12 months



Caption: QContractValue: What is the value of all these new overseas business contracts for export sales? Base: All businesses that won any new overseas business contracts (n=850 (2023/24), n=1,022 (2022/23))

Description: Chart 7.1 shows that there is little change from 2022/23 in terms of the value of all new overseas contracts made in previous 12 months. The most frequently chosen option businesses reported the value of their contracts remained at “£50,000 or below” (20%), although fewer businesses chose this option than in 22/23 (25%).

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 service, they were asked to think about the impact from

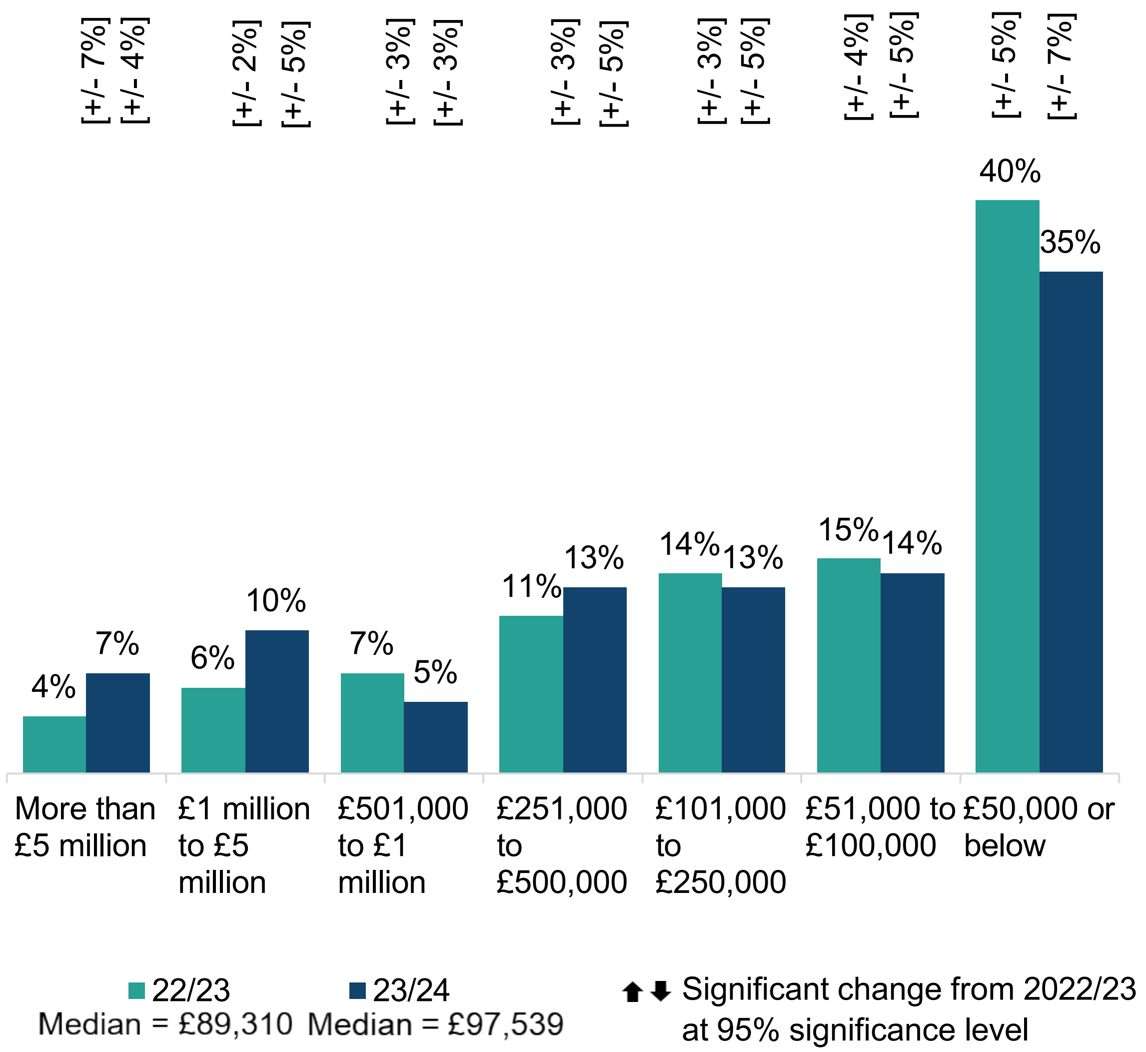
Reported value of export sales achieved since receiving the service

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 7.2). 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 DBT services were £97,539 across all contracts that DBT services helped to win (compared to £89,310 in 22/23 and £97,165 in 21/22). 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.
Over a third (35%) reported additional export sales of up to £50,000. A small proportion of businesses had exceptionally large value added by DBT support; 17% won overseas sales contracts with the help of DBT support worth £1 million or more an increase from 22/23 (10%).

Reported value of export sales achieved since receiving the service

Chart 7.2 Value of new overseas contracts helped by DBT support in previous 12 months



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 won any new overseas business contracts with the help of DBT (n=393 (2022/23), n=267 (2023/24))

Description: Chart 7.2 shows that there is little change from 2022/23 in terms of the value of new overseas contracts helped by DBT support in the previous 12 months. The most frequently chosen option businesses reported the value of the contract(s) that DBT had helped them win remained at “£50,000 or below” (35%).

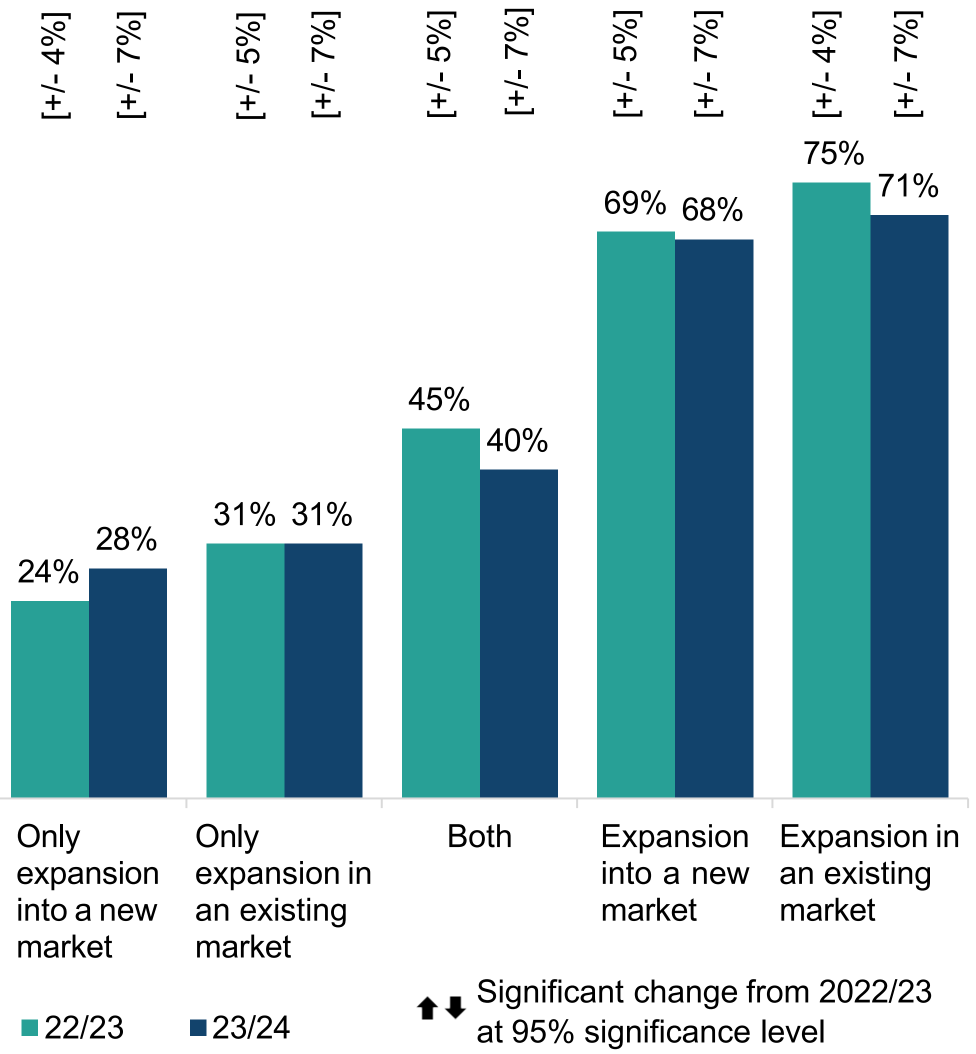
Reported value of export sales achieved since receiving the service

8 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 8.1). 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 (68%) of these businesses said they were assisted with expansion into a new market and around seven in ten businesses (71%) said they were assisted with expansion within an existing market. This includes 28% 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). Four in ten (40%) reported that DBT helped them expand into both existing and new markets. These results are in line with the previous year.

Chart 8.1 Whether new contracts won with DBT's help represented expansion into new markets or existing markets



Caption: QContractRepresent: Did these new overseas contracts represent …? Base: All businesses that won any new overseas business contracts with the help of DBT (n= 266 (2023/24), n=391 (2022/23))

Description: Chart 8.1 shows that there were no changes from 2022/23 in terms of whether new contracts won with DBTs help represented expansion into new markets or existing markets. More than two thirds (68%) of businesses had expanded into new markets, 71% had expanded into an existing market and 40% had expanded into both.

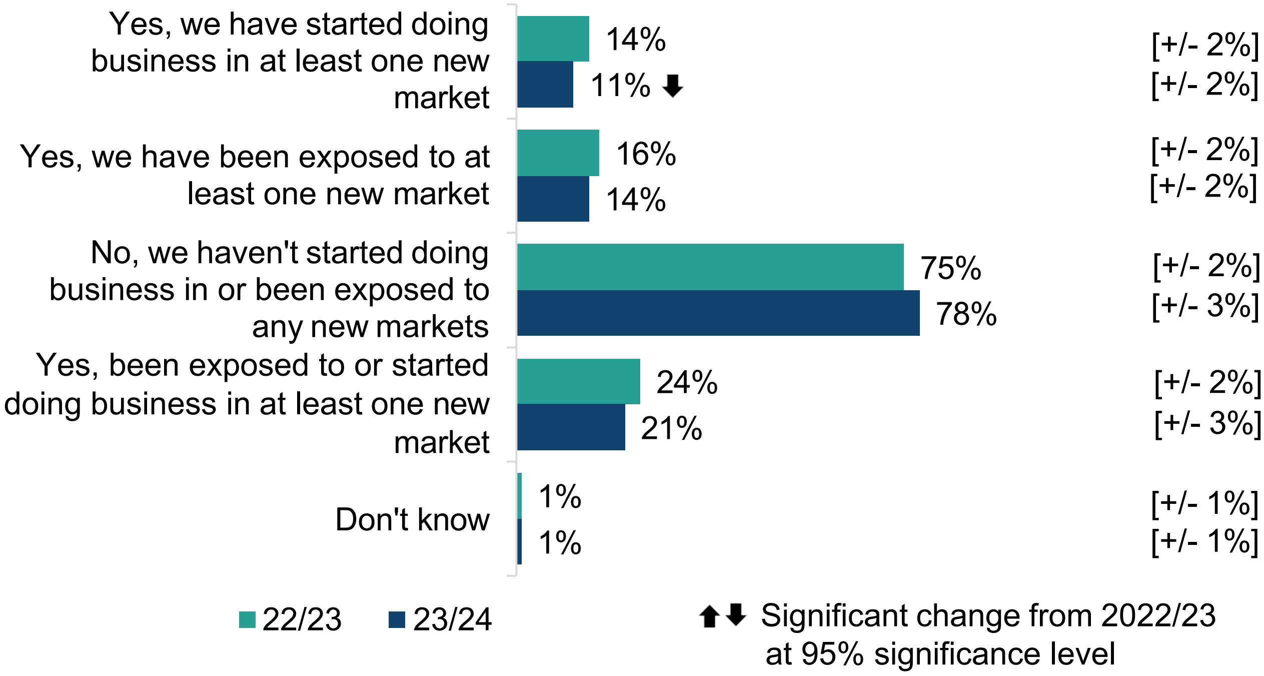
All businesses were asked whether they had increased their exposure or started doing business in any new markets because of using a DBT service[8] (Chart 8.2). Similar proportions of businesses said they had been exposed to at least one new market (14%) and had started doing business in at least one new market (11%) as a result of using a DBT service. In total, a fifth (21%) said they had either been exposed to, or had started doing business in, at least one new market. Eight in ten (78%) said they had not started doing business or been exposed to any new markets.

Breaking down results by DBT service, results that were statistically different than the average for all services included:

- Businesses that used Export and Investment Teams were more likely to report that they had been exposed to or started doing business in at least one new market (35% versus an average of 21%[9]).
- Posts users were more likely to report they had been exposed to or started doing business in at least one new market (29% versus an average of 21%).
- ITAs users were more like report they had been exposed to or started doing business in at least one new market (26% versus an average of 21%).
- Conversely, businesses that used the Export Academy service were more likely to say they had not started doing business in or been exposed to any new markets (87% versus an average of 78%).

[8] 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.
[9] Note low base of 92 for Export and Investment Teams on this measure.

Chart 8.2 Whether businesses increased exposure or starting business in a new overseas market because of receiving the DBT service



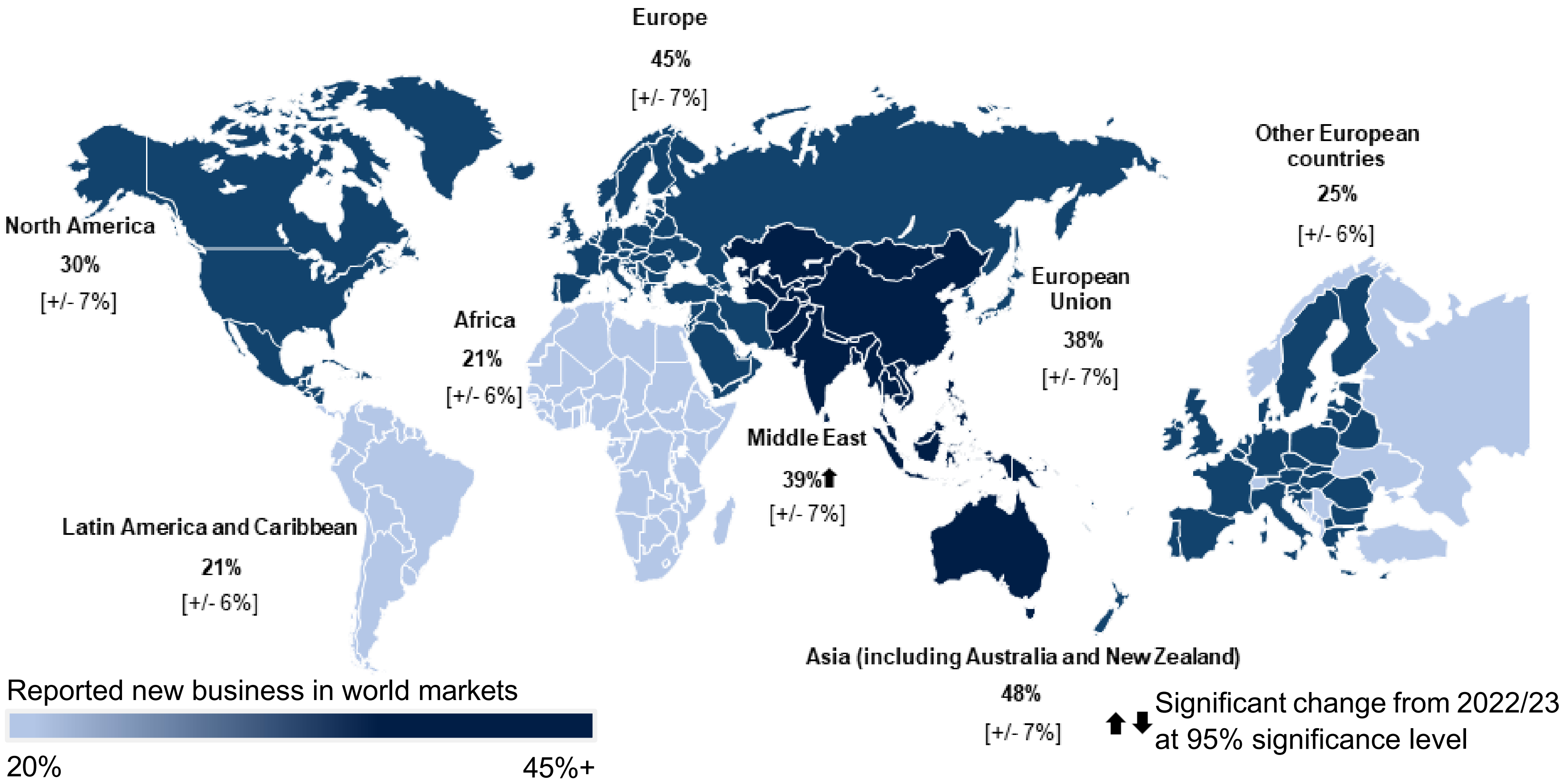
Caption: QGrowthDIT: Whether increased exposure or starting business in a new overseas market has been because of receiving the service? Base: All businesses (n=1,541 (2022/23), n=1,286 (2023/24)

Description: Chart 8.2 shows that 11% of businesses reported they had started doing business in at least one new market as a result of using a DBT service, down from 14% in 2022/23. Some 14% of businesses had been exposed to at least one new market, no significant change from 2022/23.

The most common new markets for increased exposure or business were Asia (including Australia and New Zealand) (48%) and Europe (45%), followed by the Middle East (39%) and North America (30%). This can be seen below in Chart 8.3. Looking in more detail at Europe, 38% reported that their increased exposure or new business was within the European Union, while 25% had new or increased exposure in other European countries.

Compared to the previous year, the percentage of businesses reporting they had increased exposure of business with the Middle East has increased (39% in 2023/24 versus 28% in 2022/23). Otherwise, results remained in line with the previous year.

Chart 8.3 Map: new world markets businesses had started doing business in, or been exposed to



Caption: QNewRegion: And which of the following new markets has your business started doing business in or been exposed to? Base: All firms that have started doing business in or been exposed to new markets (n= 373 (2022/23), n= 264 (2023/24))

Description: Chart 8.3 is a map of the world displaying rates of new activity reported by businesses for each continent. The most common new markets for increased exposure or business were Asia (including Australia and New Zealand) (48%) and Europe (45%), followed by the Middle East (39%) and North America (30%). Most results are in line with 2022/23 apart from the Middle East. Table 8.1.1 overleaf shows the same figures compared to 2022/23 percentage of businesses that said they had started doing business in the Middle East increased from 28% in 2022/23 to 39% in 2023/24

Recorded exposure and growth within new markets

Table 8.4 New world markets businesses had started doing business in, or been exposed to

Region	2022/23	CI (+/-)	2023/24	CI (+/-)	Change [10]
Europe	**40%**	5%	**45%**	7%	-
European Union	**35%**	5%	**38%**	7%	-
Other European countries	**17%**	4%	**23%**	6%	-
Asia (including Australia and New Zealand)	**41%**	5%	**48%**	7%	-
Middle East	**28%**	5%	**39%**	7%	↑
North America	**32%**	5%	**30%**	7%	-
Africa	**17%**	4%	**21%**	6%	-
Latin America and Caribbean	**16%**	4%	**21%**	6%	-
Base	*373*	-	*264*	-	-

[10] Charts and tables represent a statistically significant increase from 2022/23 with an upwards facing arrow, a decrease with a downwards facing arrow and no change with a dash.

Recorded exposure and growth within new markets

9 Barriers to exporting

Businesses were asked in both the QS and RIS about five **potential barriers to exporting for their business**; 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)[11].

The most frequently cited barrier in the RIS 2023/24 was ‘access to contacts’, ‘customers’ and ‘the right networks’ (39%), followed by ‘cost’ (37%). A third of businesses (34%) reported ‘time taken to comply’ was a barrier. Around a quarter of businesses reported ‘lack of knowledge’ and ‘the capacity of your business to export and cater for international contracts’ (26% and 24% respectively) were barriers.

Businesses were less likely to report ‘access to contacts’ as a barrier in RIS 23/24 (39%) versus QS 23/24 (43%). Businesses were also less likely to report ‘lack of knowledge’ as a barrier compared to RIS 22/23 (26% versus 30% in RIS 22/23) and in QS 23/24 (26% in RIS 23/24 versus 33% in QS 23/24).

Micro businesses (0-9 employees) and businesses with a turnover of up to £500,000 were more likely to report ‘capacity’ as a barrier (30% of micro businesses versus an average of 24%, and 36% of businesses with a turnover of up to £500,000 versus 19% of businesses with a turnover of more than £500,000). These businesses were also more likely to report ‘access to contacts’ as a barrier (43% of micro businesses versus an average of 39%, and 50% of businesses with a turnover up to £500,000 versus 38% of those businesses with a turnover of over £500,000).

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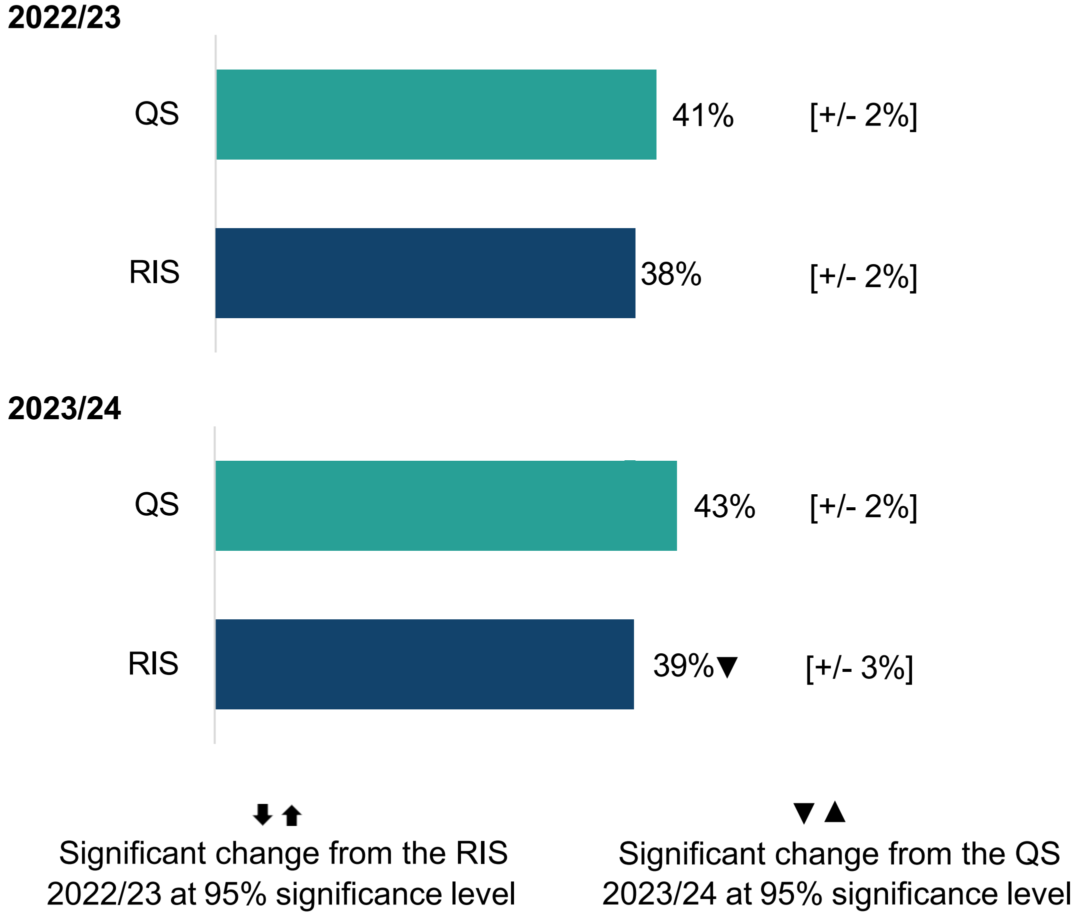
[11] This section compares results for businesses who completed both surveys and provided a response to this question in both surveys. Businesses that said a barrier was not applicable in either survey were excluded.

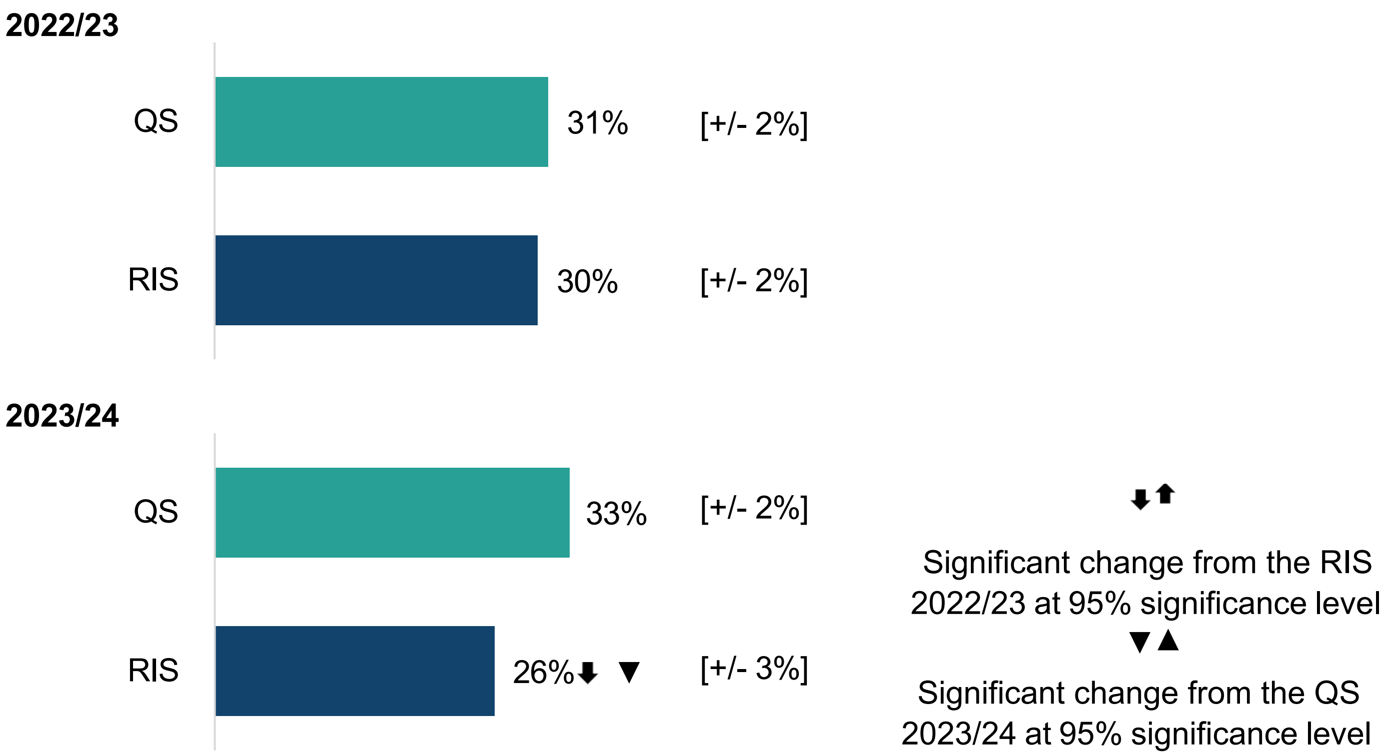
Chart 9.1 Businesses identifying ‘access to contacts, customers, and the right networks’ as a barrier to exporting – QS and RIS comparison with businesses that participated in both surveys



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 not including those who gave a ‘not applicable’ answer. (QS 2022/23 (n=1,527) QS 2023/24 (n=1,263), RIS 2022/23 (n=1,520), RIS 2023/24 (n=1,276))

Description: Chart 9.1 shows businesses were less likely to report ‘access to contacts, customers, and the right networks’ was a barrier in RIS 23/24 (39%) versus QS 23/24 (43%). There was no difference between RIS 22/23 (38%) and RIS 23/24 (39%).

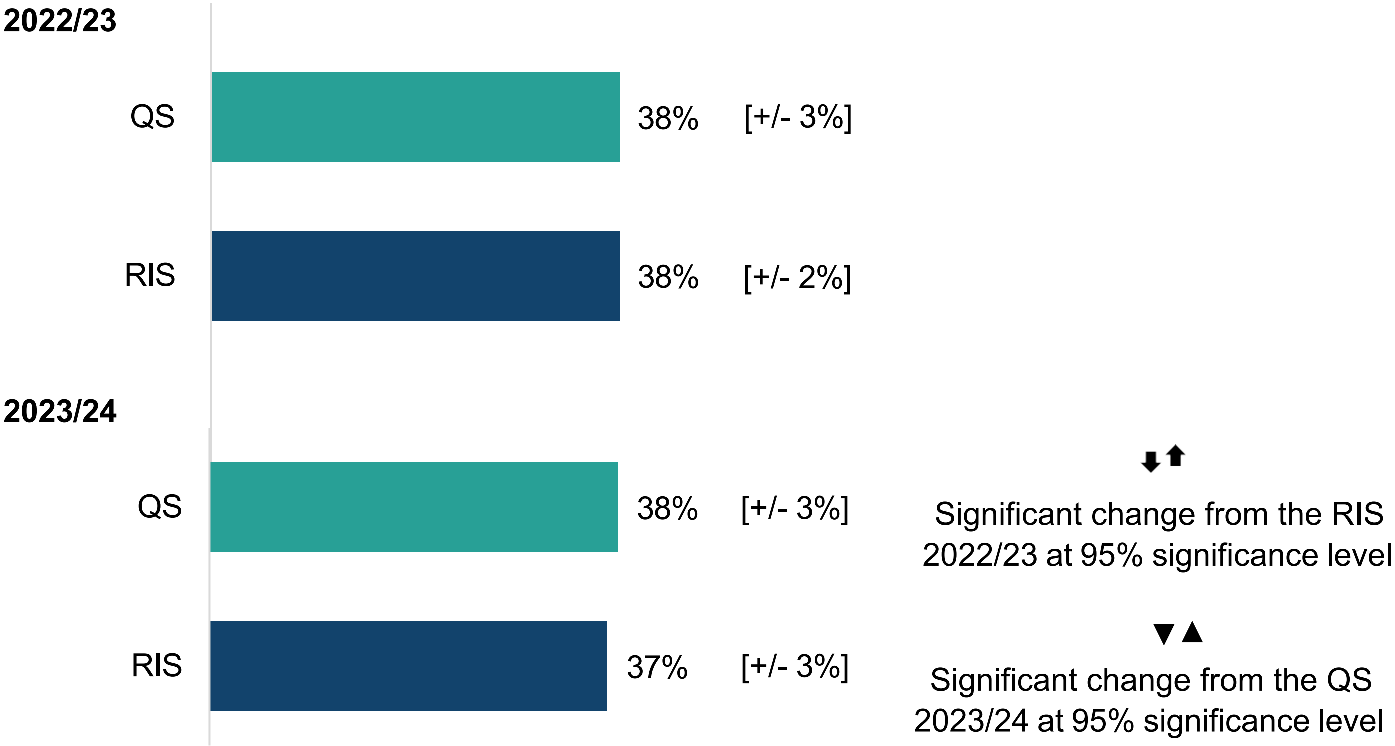
Chart 9.2 Businesses identifying 'lack of knowledge' as a barrier to exporting – QS and RIS comparison with businesses that participated in both surveys



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 not including those who gave a 'not applicable' answer. (QS 2022/23 (n=1,523), QS 2023/24 (n=1,260), RIS 2022/23 (n=1,523), RIS 2023/24 (n=1,274)).

Description: Chart 9.2 shows there was a decrease in the percentage of businesses that reported 'lack of knowledge' as a barrier in RIS 23/24 (26%) compared to both RIS 22/23 (30%) and QS 23/24 (33%).

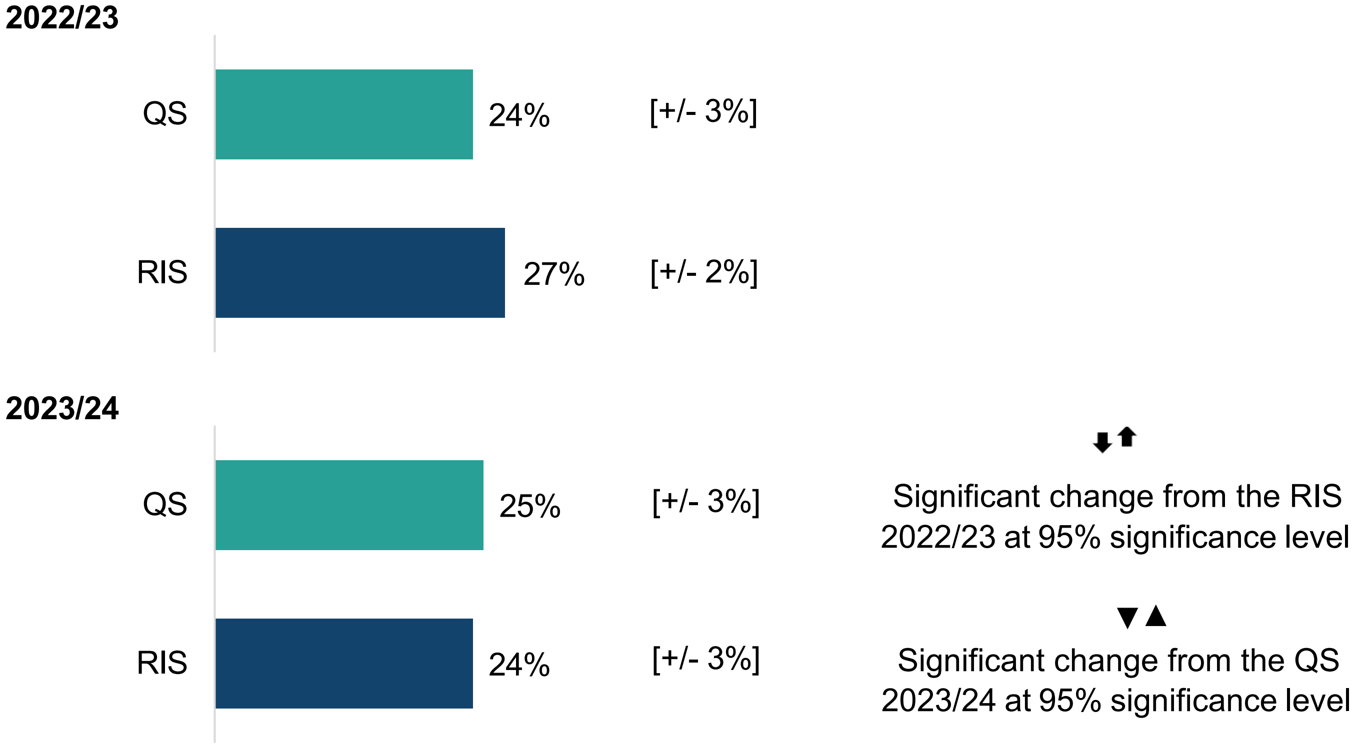
Chart 9.3 Businesses identifying 'cost' as a barrier to exporting – QS and RIS comparison with businesses that participated in both surveys



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 not including those who gave a 'not applicable' answer. (QS 2022/23 (n=1,518) QS 2023/24 (n=1,258), RIS 2023/24 (n=1,268), RIS 2022/23 (n=1,514))

Description: Chart 9.3 shows there were no significant differences between the percentages of businesses that reported 'cost' as a barrier to exporting. The percentage of businesses that reported 'cost' as a barrier in RIS 23/24 was 37% and 38% in QS 23/24.

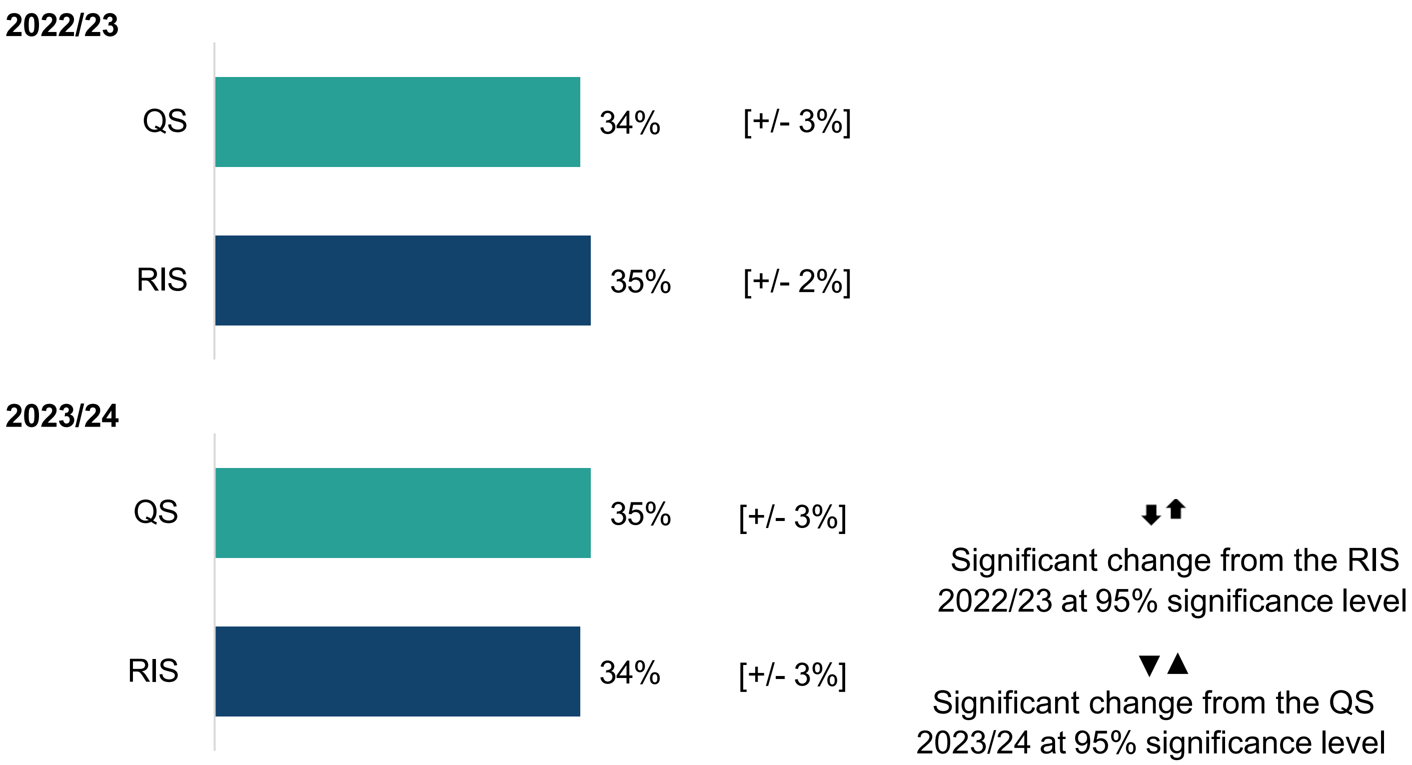
Chart 9.4 Businesses identifying 'capacity to export and cater for international contracts' as a barrier to exporting – QS and RIS comparison with businesses that participated in both surveys



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 not including those who gave a 'not applicable' answer. (QS 2022/23 (n=1,516) QS 2023/24 (n=1,251), RIS 2022/23 (n=1,511), RIS 2023/24 (n=1,267)).

Description: Chart 9.4 shows there were no significant differences between the percentages of businesses that reported 'capacity' as a barrier. The percentage of businesses that reported 'capacity' as a barrier in RIS 23/24 was 24% and 25% in QS 23/24.

Chart 9.5 Business identifying ‘time taken to comply’ as a barrier to exporting – QS and RIS comparison with businesses that participated in both surveys



Capacity: 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 not including those who gave a ‘not applicable’ answer. (QS 2022/23 (n=1,503) QS 2023/24 (n=1,245), RIS 2022/23 (n=1,496), RIS 2023/24 (n=1,258)).

Description: Chart 9.5 shows there were no significant differences between the percentage of businesses that reported ‘time taken to comply’ as a barrier. The percentage of businesses that reported ‘time taken to comply’ as a barrier in RIS 23/24 was 34% and 35% in QS 23/24.

10 Wider benefits of DBT services

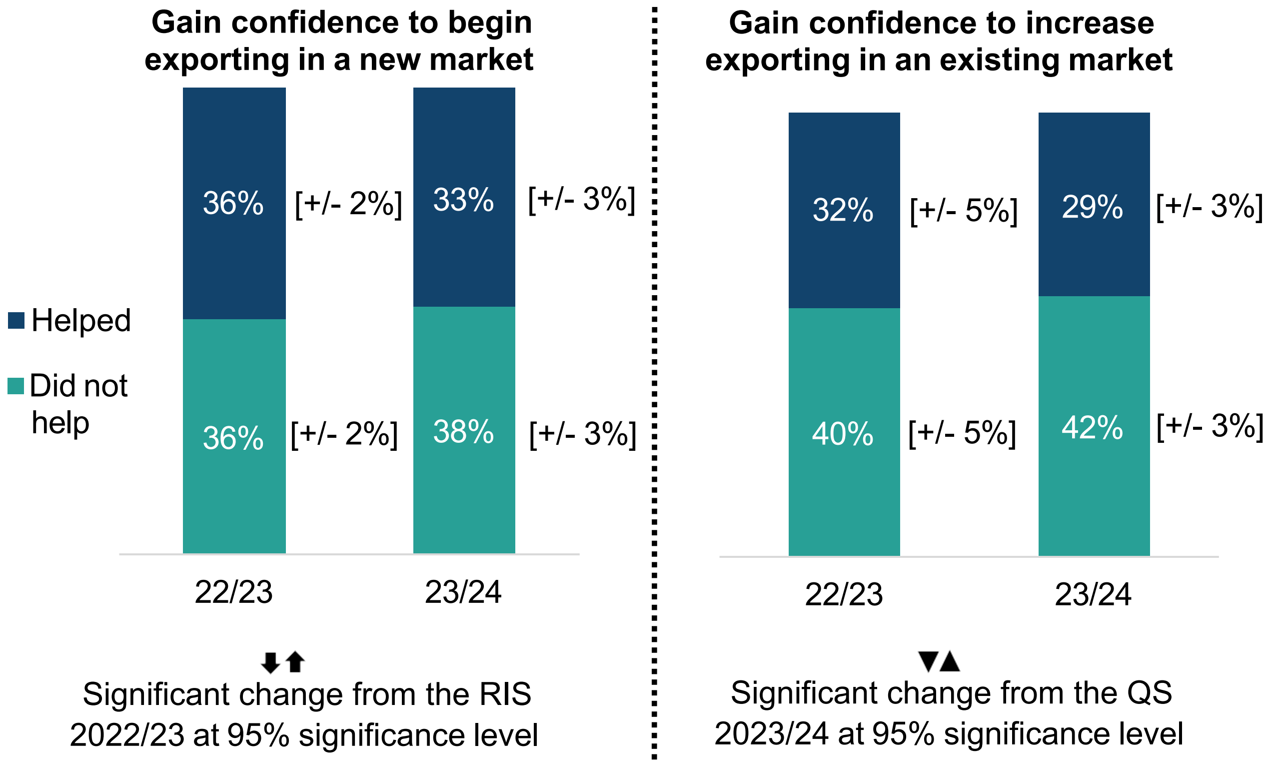
Businesses were asked to think about the extent to which using the DBT service had **helped them gain confidence** to begin exporting in a new market or increase exporting in an existing market (Chart 10.1).

A third of businesses (33%) reported that using the DBT service had helped them gain confidence to begin exporting in a new market. Around 4 in 10 businesses (38%) reported that using the DBT service had not helped them gain confidence export in a new market. A further 28% were neutral on whether DBT services had helped them in this way.

Around 3 in 10 businesses (29%) reported that using the DBT service had helped them gain confidence to increase exporting in an existing market. Around 4 in 10 businesses (42%) reported using the service did not help them gain confidence increase exporting in existing markets, and 29% were neutral.

Businesses that had used ITAs were more likely to report that using the service helped them gain confidence in exporting to a new market (38% versus 33% average) and gain confidence to increase exporting in an existing market (34% versus 29% average).

Chart 10.1 Extent that experience of the service built confidence in exporting



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 not including those who gave a 'not applicable' answer. 'Neutral' and 'Don't know' responses are not shown. Per answer: "…begin exporting to new markets": 22/23, n = 1,471; 23/24, n = 1,243. "…increase exporting in an existing market": 22/23, n = 1,435; 23/24, n = 1,235.

Description: Chart 10.1 shows 33% of businesses reported that using the DBT service had helped them gain confidence to begin exporting in a new market. Three in ten businesses (29%) reported that using the DBT service had helped them gain confidence to increase exporting in an existing market.

Businesses were asked to think about the extent to which the service had **helped them improve their knowledge.**[12] Chart 10.2 shows how businesses rated the impact of using the DBT service on their knowledge.

On balance, more businesses reported that using the DBT service was **helpful for increasing their knowledge of support available to them (from DBT and elsewhere)**. Overall, 4 in 10 businesses (40%) said the service helped to do this, while around 3 in 10 (29%) said it did not help them do this.

Around 3 in 10 businesses (29%) said the service was helpful **for increasing their knowledge of export opportunities available**. Just over a third of businesses (36%) said the DBT service did not help to do this.

A quarter (24%) of businesses said the DBT service helped them **improve their knowledge of the exporting process**, such as standards, licensing, customs, and tariffs. Just under half (46%) of businesses said that the DBT service did **not** help them in this way.

The only statistically significant difference by users of DBT services was that 34% of businesses that used the Export Academy service said it helped them **improve their knowledge of the exporting processes,** against the average of 24%.

Relatively small proportions said that using the DBT service improved their **knowledge** about their **competitors in overseas markets** (14%), or **the price of their goods** compared with those in overseas markets (11%).

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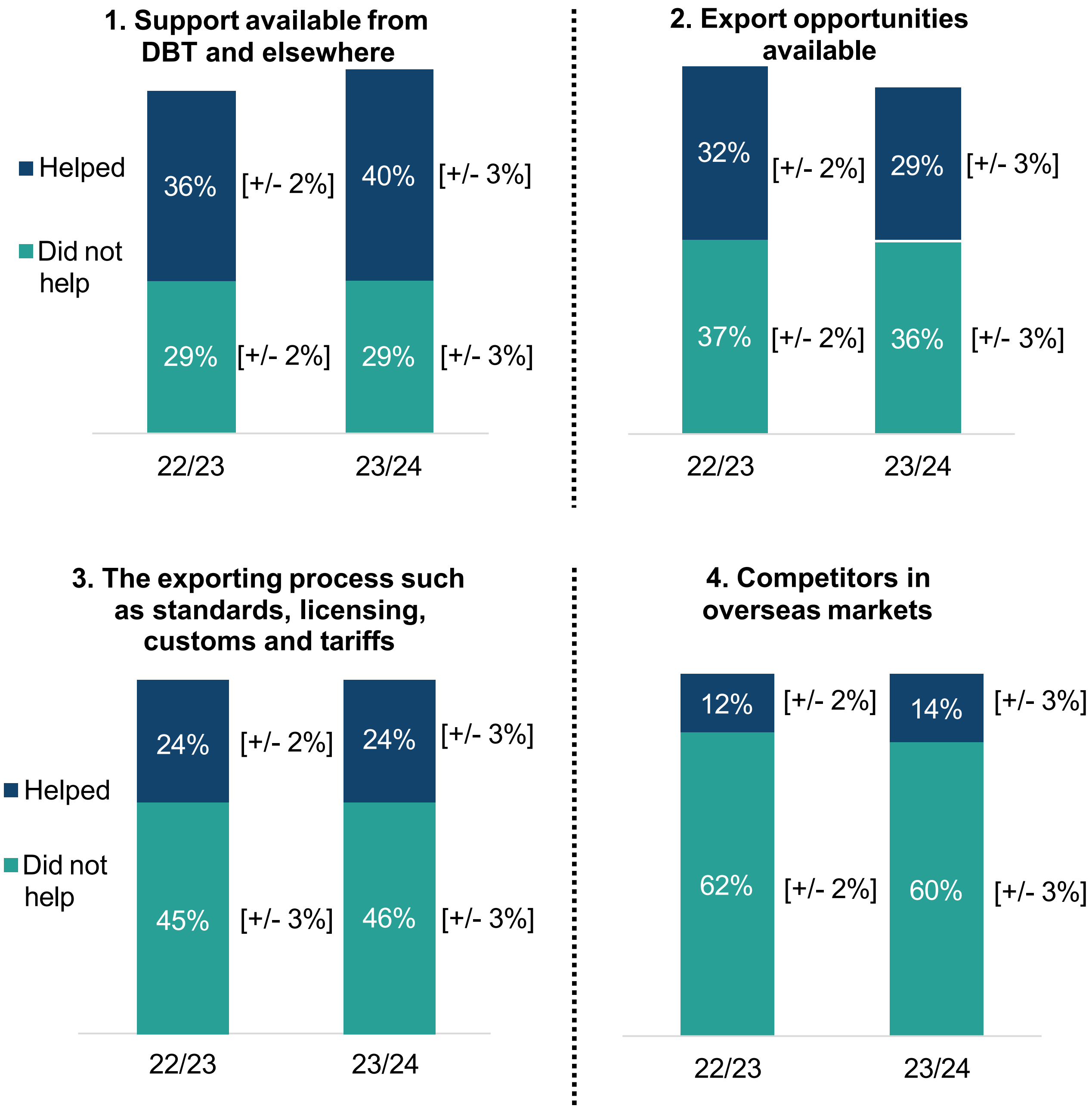
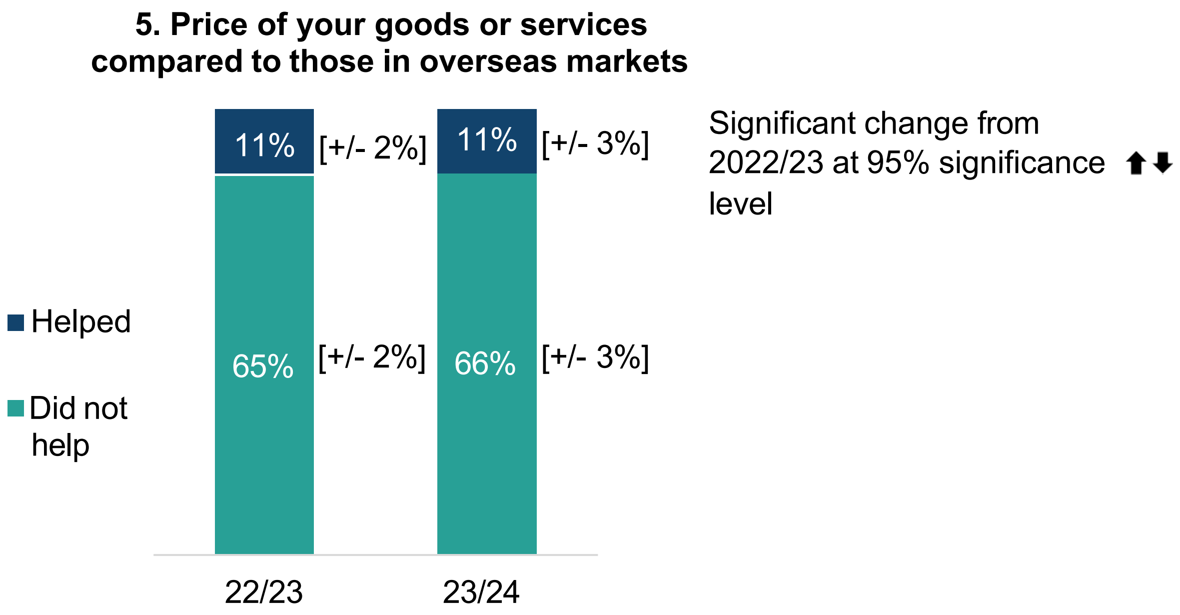
[12] Businesses were asked to rate these factors on a scale from 10 (helped a lot) to 0 (did not help at all).

Chart 10.2 To what extent the business felt it has improved its knowledge as a result of using the service[13]



[13] 1. "Support available from DBT and elsewhere", 22/23 n = 1,503, 23/24 n = 1,281
2. "Export opportunities available", 22/23 n = 1,502, 23/24 n = 1,270
3. "The exporting process such as standards, licensing, customs and tariffs", 22/23 n = 1,453, 23/24 n = 1,250
4. "Competitors in overseas markets", 22/23 n = 1,461, 23/24 n = 1,250
5. "Price of your goods or services compared to those in overseas markets", 22/23 n = 1,448, 23/24 n = 1,241



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 not including those that gave a ‘not applicable’ answer. ‘Neutral’ and ‘Don’t know’ responses are not shown.

Description: Chart 10.2 shows there was little change from the RIS 22/23 in terms of how businesses reported using DBT services had improved their knowledge.

Businesses were asked about other ways they had benefited from using the DBT service in the year between dealing with the service and taking part in the RIS.[14] A detailed breakdown of responses is shown in Chart 10.3.

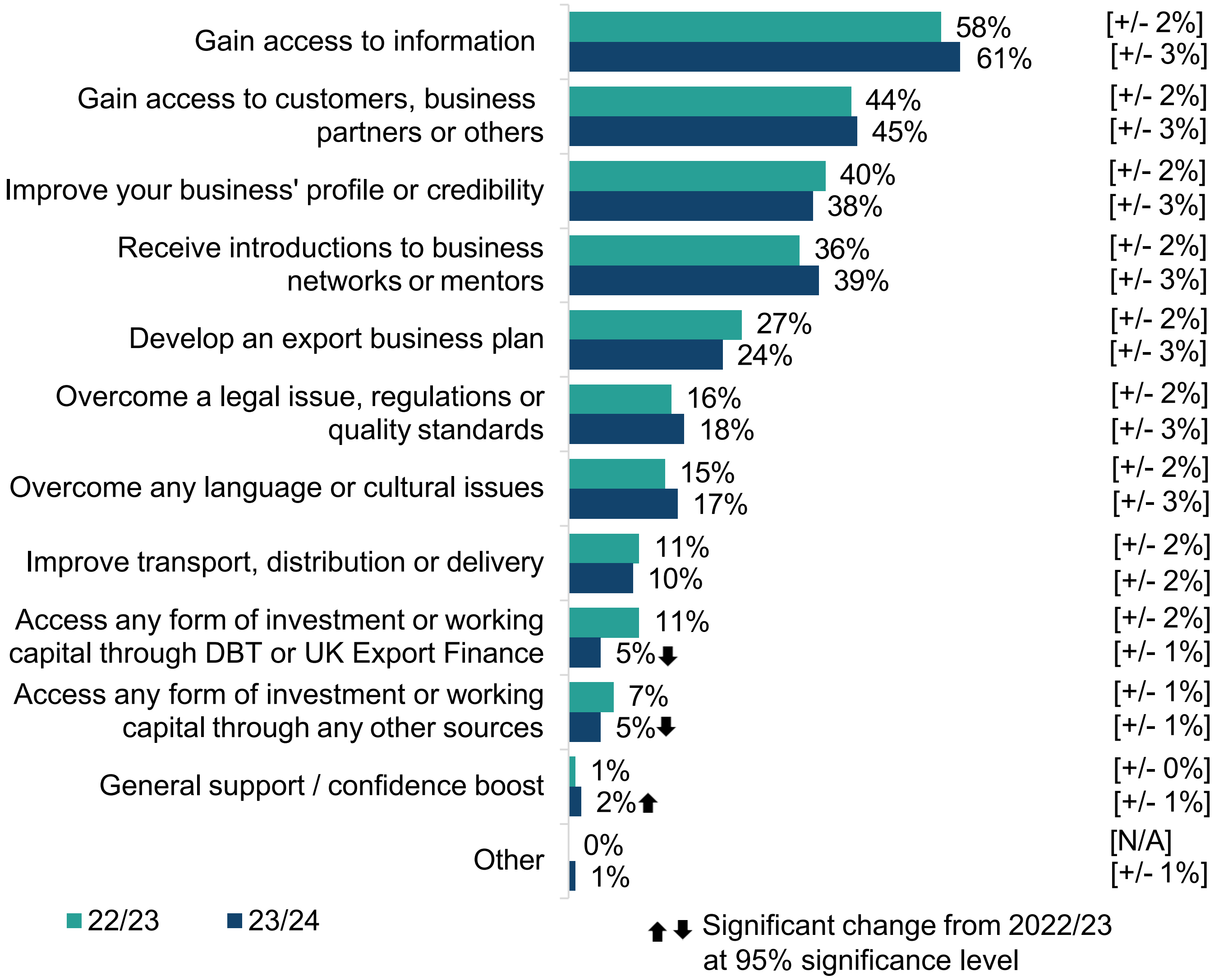
The most commonly mentioned responses were: ‘helping businesses to gain access to information’ that they would otherwise have been unable to come by (61%), or ‘gaining access to prospective customers’, ‘business partners or other people that they otherwise would have been unable to meet’ (45%). Around 1 in 5 businesses (21%) felt that using the DBT service had not helped them in any of the ways listed.

Compared to RIS 22/23, in RIS 23/24 fewer businesses reported using the DBT service had helped with:

- accessing any form of investment or working capital through DBT or UK Export Finance (5% in 23/24 versus 11% in 22/23)
- accessing any form of investment or working capital through any other sources (5% in 23/24 versus 7% in 22/23).

[14] Respondents were asked to select from a pre-coded list and had the option to provide an ‘other’ answer

Chart 10.3 In what ways businesses felt they had benefited from DBT support



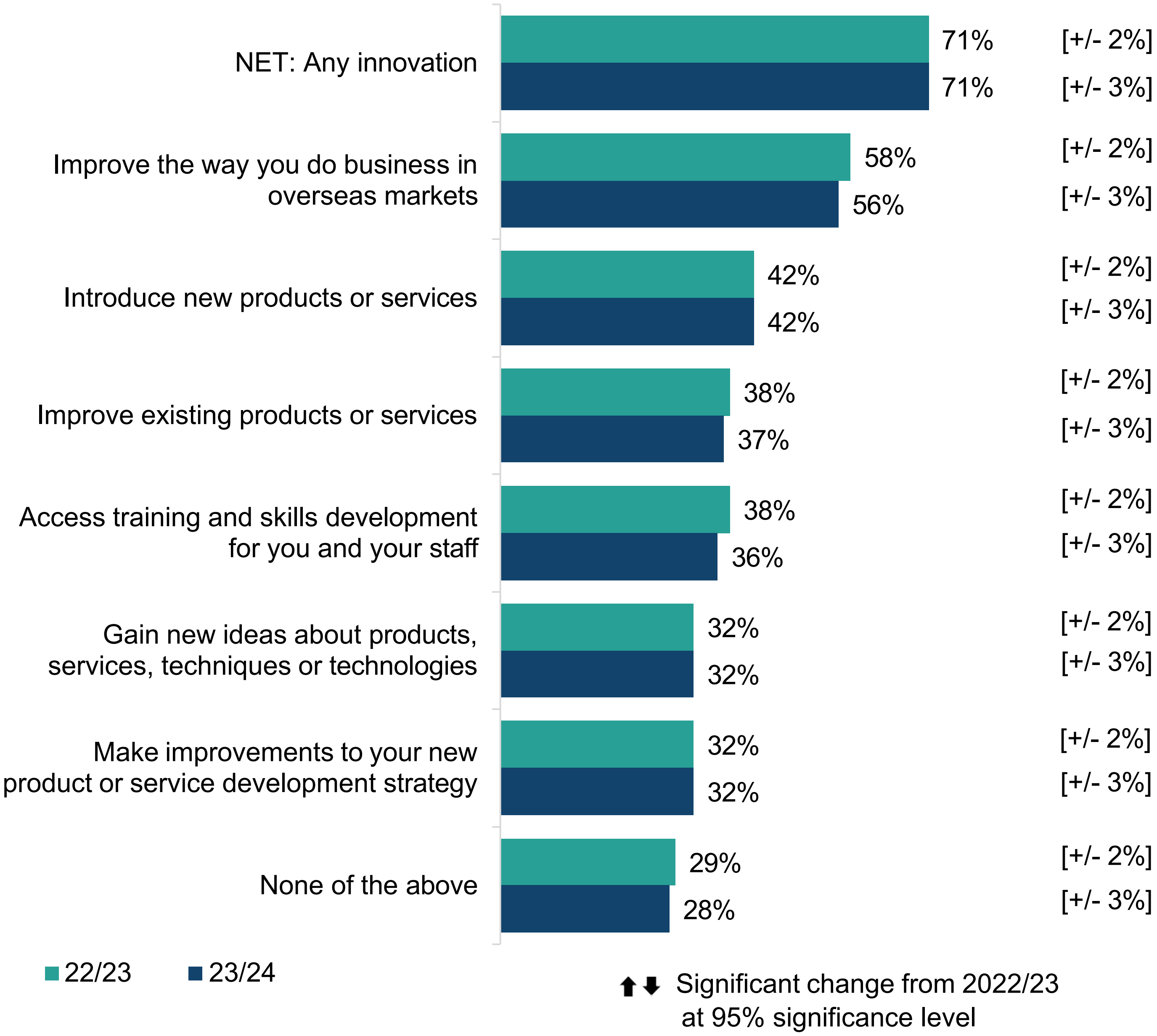
Caption: QServiceBenefit: in which of the following ways if any, has your business benefited specifically from the service over the last year?
Base: All businesses (n=1,286 (2023/24), n= 1,541 (2022/23))

Description: Chart 10.3 shows the top responses regarding how business thought they had benefited from DBT services remained helping businesses to gain access to information that they would otherwise have been unable to come by (61%), or gaining access to prospective customers, business partners or other people that they otherwise would have been unable to meet (45%). Compared to RIS 22/23 in RIS 23/24 fewer businesses reported using the DBT service had helped with: accessing any form of investment or working capital through DBT or UK Export Finance (5% in 23/24 versus 11% in 22/23) and accessing any form of investment or working capital through any other sources (5% in 23/24 versus 7% in 22/23).

Businesses were asked whether using the DBT service had helped, or was likely to help, support innovation and/or development in their business (Chart 10.4). Around 7 in 10 (71%) 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

(56%), to introduce new products or services (42%), to improve existing products or services (37%) and to access training and skills for themselves or their staff (36%). Businesses that used the Export Academy service were more likely to report any of the innovations in the chart below (77% versus 71% average). There were no significant changes from the previous wave.

Chart 10.4 Whether the service has / will help innovation and development



Caption: QInnovationSupport: Has this service helped or do you expect it to help your business with development and/or innovation? Base: All businesses (n= 1,286 (2023/24), n= 1,541 (2022/23))

Description: Chart 10.4 shows there was no change from the RIS 22/23 in terms of whether the service has / will help innovation and development. A total of 71% said that using the service helped them with innovation or development in some form. The most frequent response was to improve the way they do business overseas (56%).

International contacts

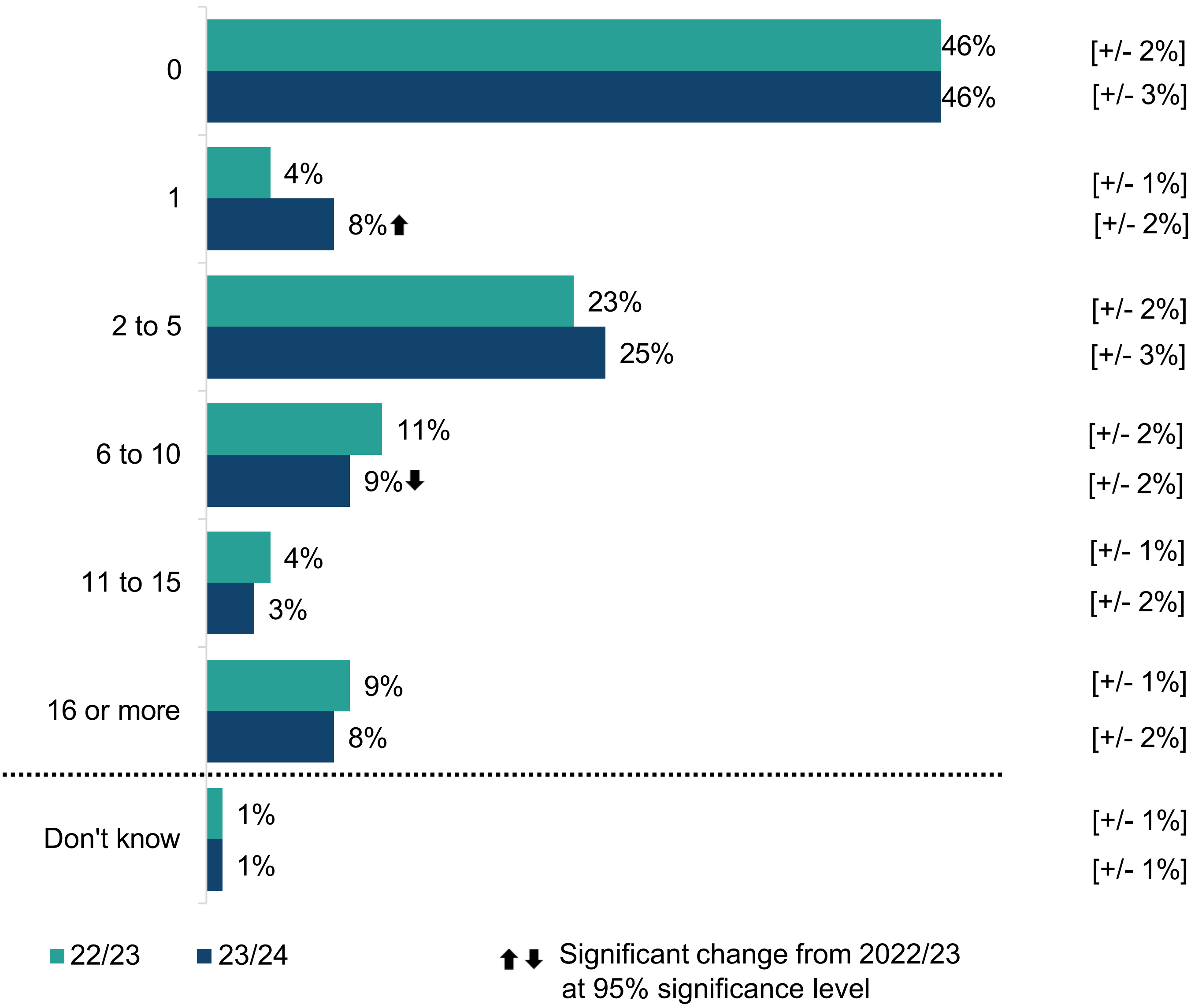
Businesses were asked how many overseas contacts they had made as a result of using the DBT service over the past year (Chart 10.5). Just over half (53%) of businesses made at least one new overseas contact in the year since using a DBT service. This was in line with the previous year (52% in RIS 22/23).

A quarter (25%) made between 2 and 5 new contacts. Some 8% of businesses reported making 16 or more new contacts as result of using a DBT service over the past year. Just under half (46%) reported that they had not made any new contacts as a result of using a DBT service.

This year more businesses reported making 1 contact (8% in 23/24 versus 4% in 22/23) and fewer businesses reported making 6 to 10 contacts (9% in 23/24 versus 11% in 22/23).

Businesses that had used the Export Academy service were more likely to report having made no new overseas contacts (60% versus an average of 46%). Businesses that had used Posts or ITAs were more likely to report they had made 16 or more contacts (17% for Posts and 11% for ITAs versus an average of 8%).

Chart 10.5 Number of new overseas contacts made in previous 12 months



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 (n=1,286 (2023/24), n=1,541 (2022/23))

Description: Chart 10.5 shows the number of new overseas contacts made in the previous 12 months. Just under half of businesses (46%) reported they had not made any new contacts as a result of using a DBT service. A quarter (25%) made between 2 and 5 new contacts. More businesses reported making 1 contact (8% in 23/24 versus 4% in 22/23) and fewer businesses reported making 6 to 10 contacts (9% in 23/24 versus 11% in 22/23).

Businesses were asked about the impact they had seen as a direct result of using a DBT service (Chart 10.6). Around 4 in 10 businesses (42%) said they thought using the DBT service had increased or improved the skills of existing UK employees. Around a third of businesses said they thought using the DBT service had improved job satisfaction among existing UK employees (35%), safeguarded jobs in the UK (34%), or increased export sales per employee (31%).

Wider benefits of DBT services

This year fewer businesses reported they had:

- stronger market position in the UK (20% in 23/24 versus 24% in 22/23)
- taken on more contract/freelance staff in the UK (16% in 23/24 versus 21% in 22/23)
- increased turnover in the UK (15% in 23/24 versus 18% in 22/23)
- increased wages to existing UK employees (24% in 23/24 versus 28% in 22/23)

This year more businesses said none of the changes asked about applied to them (42% in 23/24 versus 37% in 22/23).

Looking at results for "Net: any changes" across the different DBT services, as displayed in Chart 10.7, there were no statistically significant differences from the average to report.

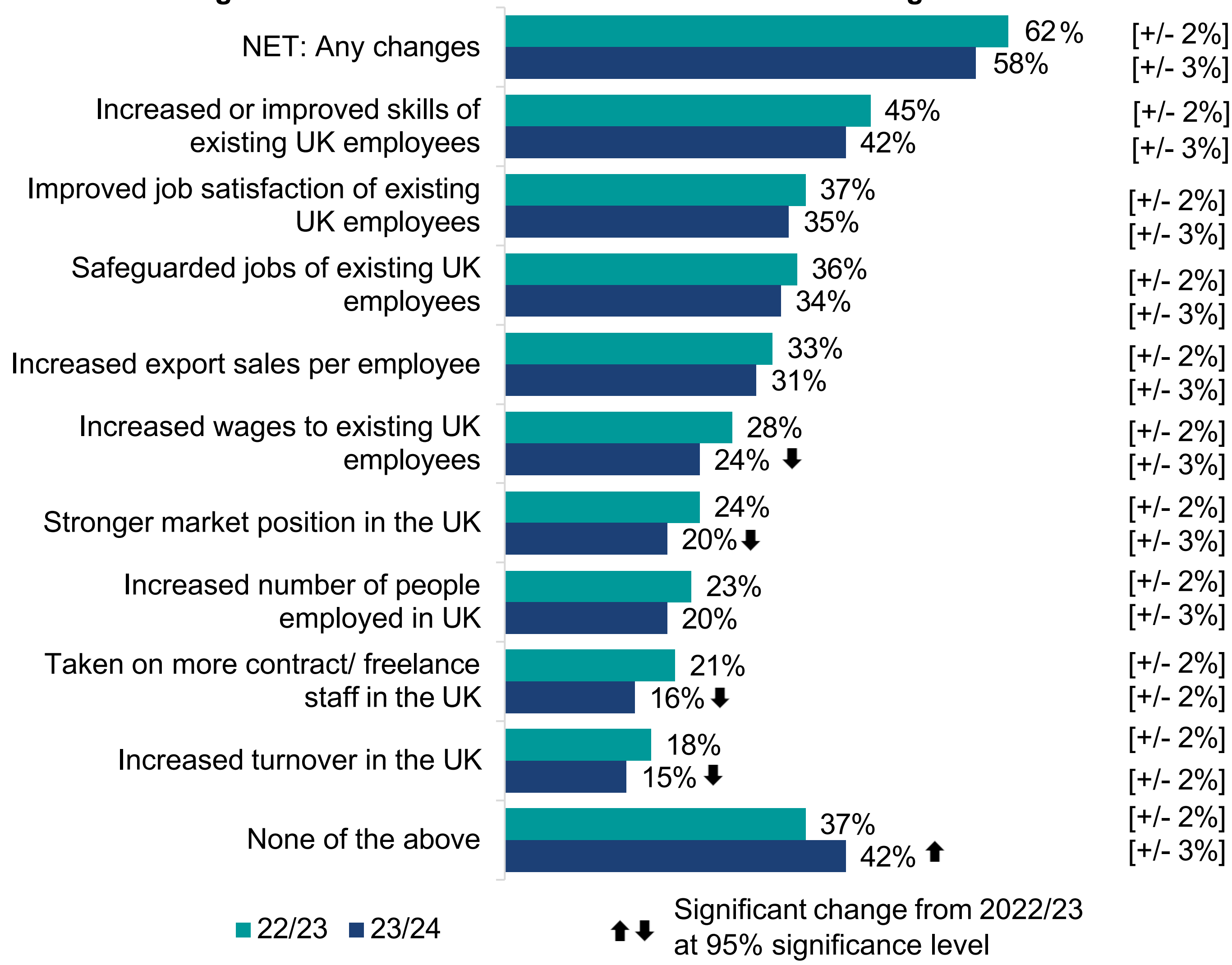
However, when breaking down the most frequently cited changes reported by DBT service used (Chart 10.8), businesses that used the Export Academy service were more likely to report they had seen increased or improved skills of existing UK employees (47% versus 42% average). Conversely, Export Academy users were less likely than the average to say it had safeguarded the roles of existing UK employees (28%, versus 34% across all services).

Businesses that used the Export and Investment Teams service were more likely to than the average to report jobs of existing UK employees were safeguarded (48% versus 34% average).

In addition to the differences by DBT service used that are shown on Chart 10.8, businesses that used the ITAs service were more likely to report they had seen the following changes compared to the average across all services:

- increased wages to existing UK employees (30% versus 24% average)
- increased export sales per employee (35% versus 31% average)

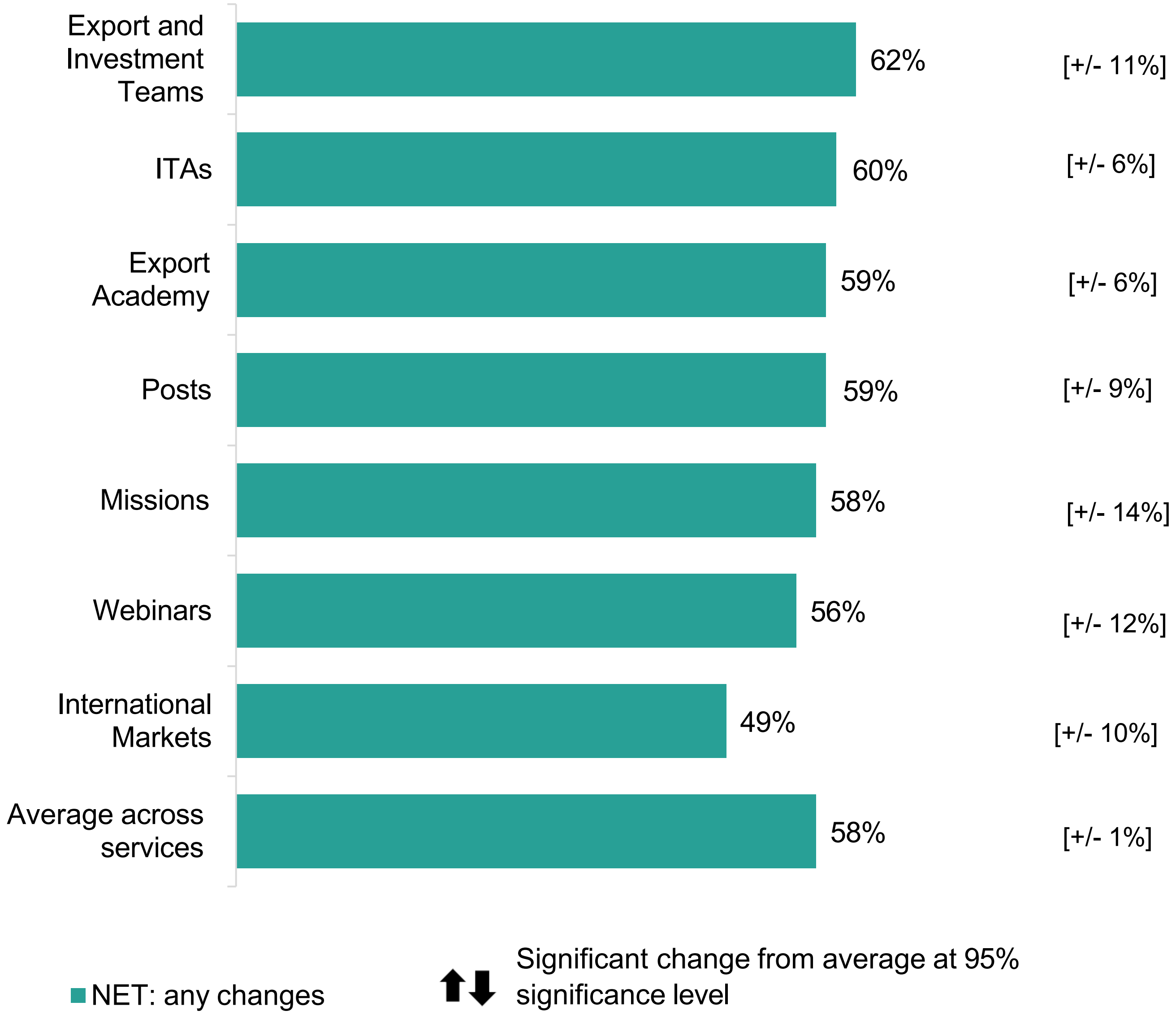
Chart 10.6 Changes seen in the UK business as a result of receiving the service



Caption: QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service? Base: All businesses (n= 1,541 (2022/23), n= 1,286 (2023/24))

Description: Chart 10.6 shows the changes businesses expected / or had seen in the UK business as a result of receiving the service. Overall, 58% had seen or expected to see any of the changes listed in the chart. This year fewer businesses reported they had a stronger market position in the UK (20% in 23/24 versus 24% in 22/23), took on more contract/freelance staff in the UK (16% in 23/24 versus 21% in 22/23), increased turnover in the UK (15% in 23/24 versus 18% in 22/23), and increased wages to existing UK employees (24% in 23/24 versus 28% in 22/23). This year more businesses reported that they had not seen any of the changes listed (42% in 23/24 versus 37% in 22/23).

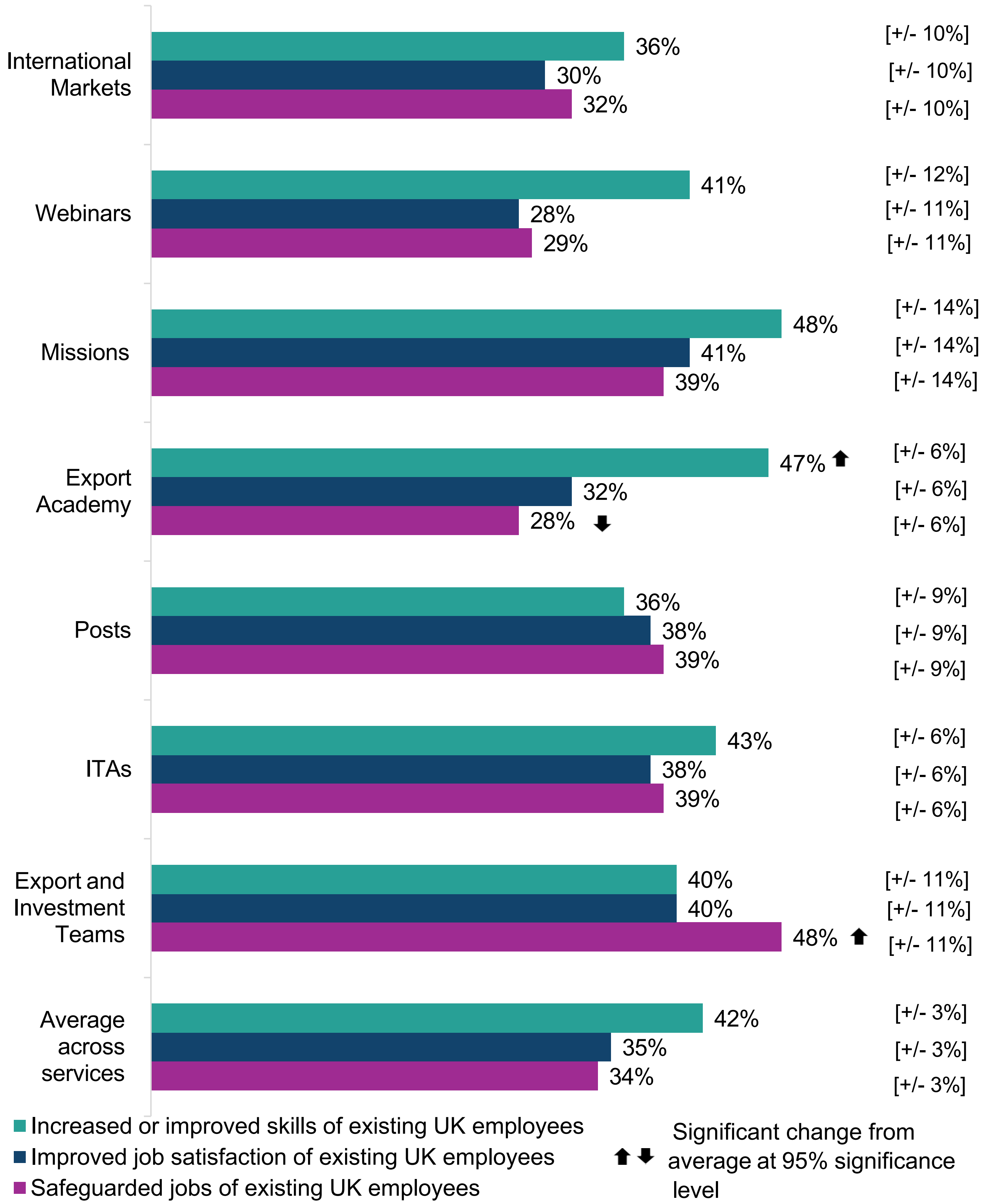
Chart 10.7 Changes seen in the UK business as a result of receiving the service, (any changes reported), by individual service



Caption: QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service? Base: All businesses (n= 1,286), ITAs (n=390), Posts (n=155), E & I Teams (n=92*), International Markets (n=90), Missions (n=61*), Webinars (n=106), Export Academy (n=363). *Small base size

Description: Chart 10.7 shows that, for users of the individual DBT export services, around half of businesses (between 49% and 62%) reported any changes. Businesses that used the E & I Teams service were most likely to report any changes (62%), whilst businesses that used International Markets were least likely to do so (49%).

Chart 10.8 Changes seen in the UK business as a result of receiving DBT services, top three changes reported, by individual service



Caption: QUKChanges: Which of the following changes have you seen within your UK business as a direct result of the service? Base: All businesses (n= 1,286), ITAs (n=390), Posts (n=155), E & I Teams (n=92*), International Markets (n=90*), Missions (n=61*), Webinars (n=106), Export Academy (n=363). *Small base size

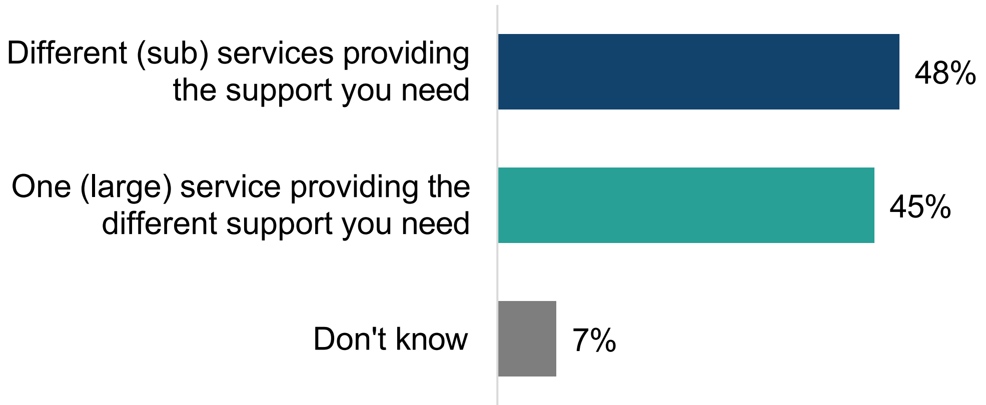
Description: Chart 10.8 displays the top three changes seen by businesses as a result of using DBT services, split by service and compared with the average across all services. Statistically significant results include users of the Export Academy being less likely to report that jobs of UK employees were safeguarded (28% vs 34%), but more likely to report increased or improved skills of existing UK employees (47% vs 42%), and users of the E&I Teams service being more likely to say jobs of existing UK employees were safeguarded (48% vs 34%).

10.1 Business perceptions of DBT services

New for this wave of the RIS, businesses were asked whether they perceived DBT support to consist of one large service providing the different support they need, or as different sub-services providing this support.

There was a near equal split, with 45% of businesses saying they saw DBT's export supports services as one large service, 48% perceiving it as different sub services, and 7% saying don't know (see Chart 10.9).

Chart 10.1.1 Perceptions of DBT services as separate or combined



Caption: Q067_QPerception - What was your perception when you approached DBT for support with exporting? Base: All businesses, RIS 2023/24 (n=1287)

Description: Chart 10.1.1 shows the proportion of businesses that, when they approached DBT, perceived its export support services either to be comprised of different sub services providing support – chosen by 48% – or one large service providing a range of support, chosen by 45%, or who said "don't know" in response to this question (7%).

Perceptions from users of digital and non-digital services were broadly similar, with 46% and 44%, respectively, perceiving DBT services as separate from each other, compared to 45% of all businesses. A similar proportion of non-digital service users – 50% – perceived DBT support as one large service compared to digital service users, on 46%.

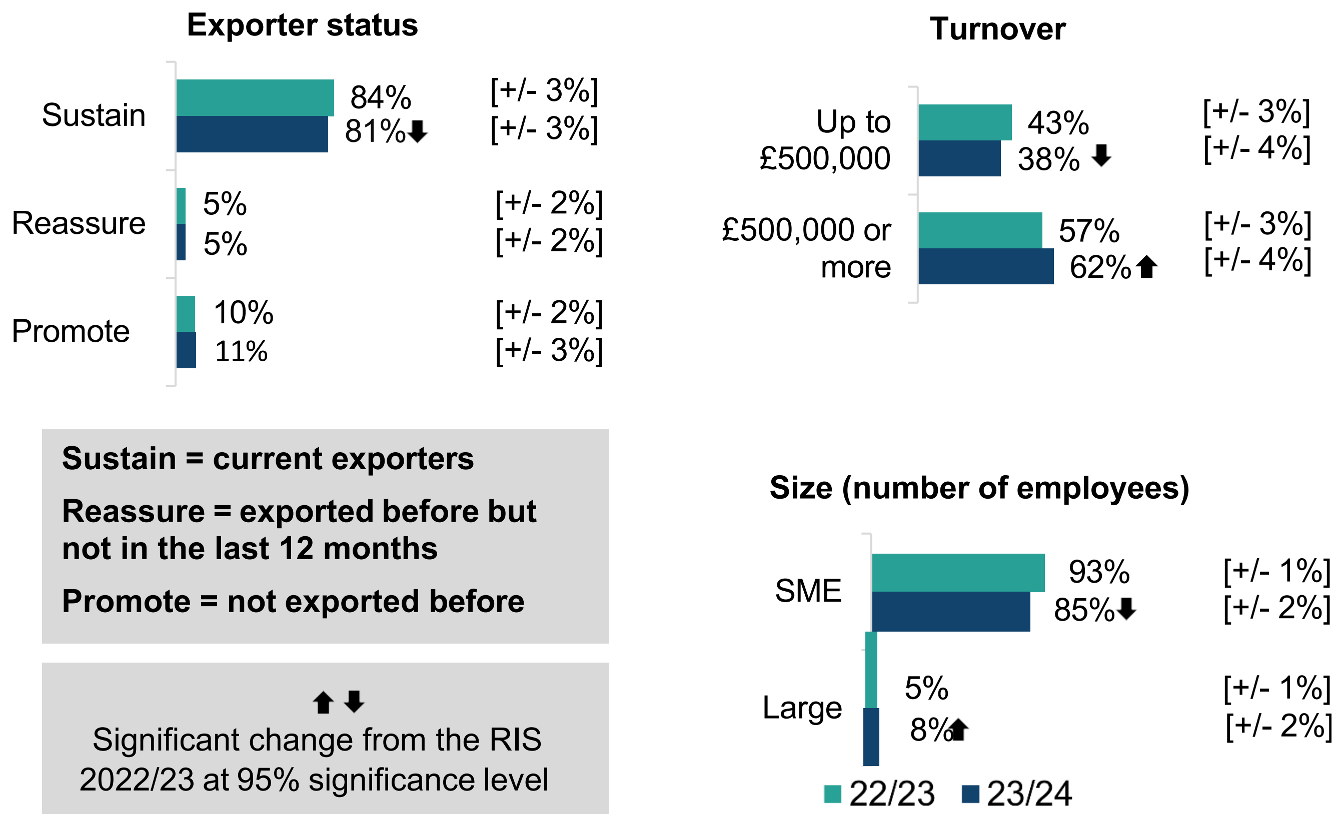
Finally, businesses with turnover above £500,000 were more likely to perceive DBT services as separate, than those with turnover below this figure (52% versus 43%).

11 Profile of respondents

Looking at all businesses that used DBT services 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 8 in 10 (81%) were exporters, meaning they were exporting at the time of service use, or in the last 12 months. This was lower than in 22/23 which was 84%.

There was a change in business profile in terms of turnover and size since the previous year, with more businesses reporting they had a turnover of £500,000[15] or more (62% in 23/24 versus 57% in 22/23) and more businesses classed as large businesses (8% in 23/24 versus 5% in 22/23).

Chart 11.1 Profile of RIS Respondents



Caption: Export Status (from RIS) and size (from QS) Base: All businesses (n=1,541 (2022/23), n=1,286 (2023/24), Turnover (from QS) Base: All businesses excluding Don't know and Refused (n=1,026 (2022/23), n=816 (2023/24)).

Description: A group of charts showing the export status, turnover and size of businesses. For RIS 23/24 fewer businesses were classed as Sustain (81% versus 84% in RIS 22/23), more businesses had a turnover of £500,000 or more (62% versus 57% in RIS 22/23) and more businesses were large businesses (8% versus 5% in RIS 22/23).

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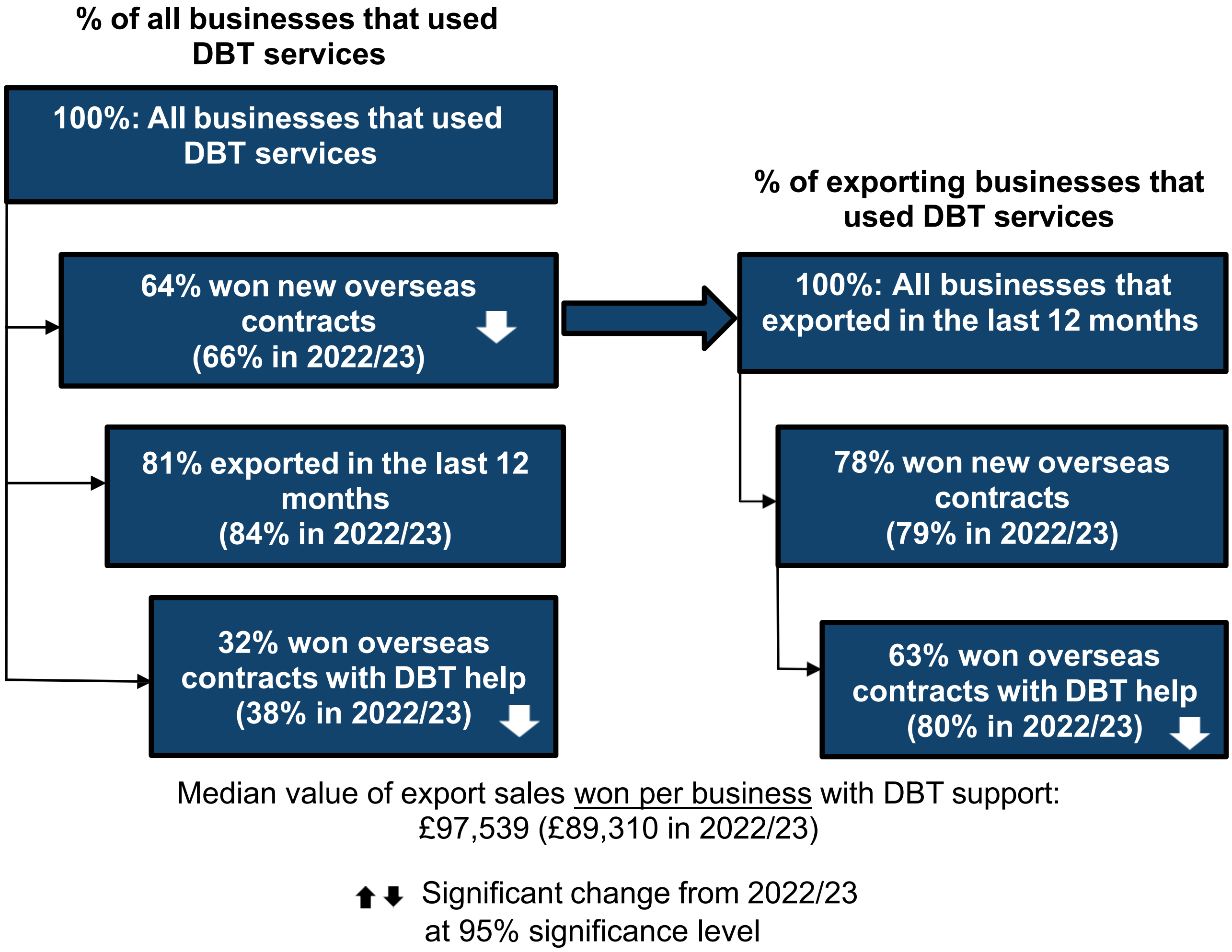
[15] This figure has remained consistent across survey waves, without adjustment for inflation

Chart 11.2 Summary of businesses supported by DBT services



Caption: Base: All businesses (n=1,541 (2022/23), n=1,286 (2023/24)); All businesses that won at least one overseas business contract in the last 12 months (n=1,087 (2023/24), n=1,297 (2022/23); All businesses that won at least one overseas business contract with the help of DBT (n=493 (2022/23), n=432 (2023/24).

Description: Flow chart showing the summary of the proportion of businesses who won overseas contracts with DBTs help. Fewer businesses had exported in the past 12 months (81% versus 84% in RIS 22/23). Of these businesses that did export 78% won new overseas contracts, and 63% said they won these contracts with help from DBT; however this was lower than for RIS 22/23 (80%). Among all businesses DBT helped, 64% had won new overseas contracts, and 32% said they won these with help from DBT, which is lower than for RIS 22/23 (38%).

Appendix: Reporting exporting outcomes based on 'all respondents'

There are several charts within the RIS report 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 QContractService[16] or QContractDBT[17] 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. An example of this is shown in Charts 6.2, 6.3, and 6.4.

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[16] 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?*

[17] 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?*

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