



Department for
Business, Innovation,
Science and Trade

DBT National Survey of UK Registered Businesses 2025

2025 Report

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Contents

1. Executive Summary	4
1.1 About the National Survey of Registered Businesses (NSRB)	4
1.2 Overall context and main findings (<i>£500,000+ turnover businesses</i>)	4
1.3 Key findings by theme – (<i>£500,000+ turnover businesses</i>)	6
2. Background	12
2.1 DBT's objectives	12
2.2 Context	12
3. Survey methodology	16
3.1 The objectives of the NSRB	16
3.2 Sample and fieldwork design	17
3.3 Sample size and effective base sizes	19
3.4 Statistical significance	20
3.5 Segment definitions	21
4. Current and future exporting behaviours – (<i>£500,000+ turnover businesses</i>)	23
Key findings	23
4.1 Current exporting behaviours	24
4.2 Exporting goods and services	30
4.3 Export change in the last 12 months	33
4.4 Active and passive exporting	34
4.5 Export markets	35
4.6 Future plans for exporting	36
5. Barriers to exporting – (<i>£500,000+ turnover businesses</i>)	38
Key findings	38
5.1 Capabilities to focus on exporting	39
5.2 Barriers to exporting goods and services (introduction)	41
5.3 Barriers to exporting goods	42
5.4 Barriers to exporting services	44
6. Free Trade Agreements (FTAs) – (<i>£500,000+ turnover businesses</i>)	47
Key findings	47
6.1 Knowledge of FTAs	48
6.2 Expected effects of FTAs	49
6.3 Information and support relating to FTAs	50
6.4 Experience of FTA benefits	51
7. Supply Chains – (<i>£500,000+ turnover businesses</i>)	53

Key findings	53
7.1 Experiences with supply chains	53
7.2 Supply chain issues and resolutions	54
7.3 Having adequate supply chains to start and continue exporting	56
8. Knowledge, information and support – (£500,000+ turnover businesses)	57
Key findings	57
8.1 Current knowledge about exporting	57
8.2 Knowledge about where to go for information, help and support	59
8.3 Interest in support and advice about exporting	61
8.4 Awareness and usage of DBT export services	62
8.5 Knowledge and skills gaps picked up throughout the survey	65
9. Expectations for growth and trade – (£500,000+ turnover businesses)	66
Key findings	66
9.1 Business thinking on growth	66
9.2 Attitudes to exporting, and demand for UK products	68
9.3 Expectations for growth over the next 12 months	69
10. Importing – (£500,000+ turnover businesses)	71
Key findings	71
10.1 Importing activity	71
10.2 Eligibility for FTA benefits	72
11. Advertising and campaign metrics – (£500,000+ turnover businesses)	73
Key findings	74
11.1 Awareness of advertising and information about exporting	75
11.2 'Made in the UK, Sold to the World' campaign recognition	79
11.3 UK Export Academy campaign and great.gov.uk help and support pages recognition	82
11.4 DBT campaign effectiveness	84
11.5 Overall impact of campaign materials	85
12. Findings within the total registered business population	87
Key findings	87
12.1 Exporting behaviours	88
12.2 Barriers to exporting	89
12.3 Free Trade Agreements (FTAs)	91
12.4 Supply chains	91
12.5 Knowledge, information and support	92
12.6 Expectations for growth and trade	93
12.7 Advertising and Campaign metrics	94

1. Executive Summary

1.1 About the National Survey of Registered Businesses (NSRB)

In July 2026, the government created a new department called The Department for Business, Innovation, Science and Trade (BIST). The new department encompasses the previous Department for Business and Trade (DBT) with parts of the former Department for Science, Innovation and Technology (DSIT) and the Investment Security Unit. The new department, BIST, brings together Britain's strengths in science, technology and innovation with the government's economic and industrial priorities. The new department has greater power to drive investment, support innovation and remove barriers holding back growth.

The National Survey of Registered Businesses' exporting behaviours, attitudes and needs (NSRB) was commissioned by the then-Department for Business and Trade (DBT), now part of the Department for Business, Innovation, Science and Trade. It monitors exporting behaviours, plans, capabilities, and attitudes of businesses across the UK. It is also used as a tool for evaluating the performance of DBT communication campaigns.

In total, 10 annual waves of the NSRB have been completed, commencing in 2015. This report is focused on the tenth and most recent wave of data, collected across 2025. In 2025, a total of 2,894 responses were collected from businesses throughout the year, split into 4 quarters, across 3 collection periods. Data for quarter 1 was collected between 6 March and 28 April. Data for quarter 2 was collected between 2 June and 18 July. Data for quarter 3 and quarter 4 was collected across an extended collection period between 3 September and 19 November. This report focuses on findings from across the year, comparisons with previous years, and sub-group differences where appropriate. Throughout the report, figures have been rounded to the nearest whole number and as such, breakdowns may not always sum to the expected total. Since fieldwork for NSRB Wave 10 took place on behalf of the Department for Business and Trade, before the change to BIST, references to DBT remain throughout where appropriate.

The primary focus of the NSRB is on businesses with an annual turnover of £500,000 or more. This is on the basis that these larger businesses can potentially generate high value exports at larger scale. Throughout most of this report, 'UK businesses' is referring only to those with a turnover of £500,000 or higher. This is not true of chapter 12, which reports on findings from the 'total business population'. The 'total business population' refers to the whole respondent population, incorporating businesses with a turnover of less than £500,000.

1.2 Overall context and main findings (*£500,000+ turnover businesses*)

Throughout 2025, businesses continued to face challenges. While pre-existing concerns around the EU exit, inflation and economic uncertainty, rising energy prices and COVID-19 were still prominent, these were stable or decreased compared to 2024. In addition, while the proportion of exporting businesses has declined over time, the net balance of reported exporting volumes for goods improved since 2024, while the net balance for the export of services remained stable, indicating a stabilisation of the business environment. In contrast, businesses were less optimistic about their business growth, and the growth in the value of UK exports.

In July 2024 the UK held a general election, which led to a change in government. All data from Wave 10 was collected under the new, Labour, government. During 2025, a number of

new policy frameworks were introduced, including the [Industrial Strategy](#) and [Trade Strategy](#), both launched in June 2025, and the [Small Business Strategy](#) (July 2025), which together set out the government's approach to supporting business growth, productivity and international trade. Alongside these strategies, 2025 also saw continued policy development in areas affecting the business environment, including progression of the Employment Rights Bill, which set out proposed reforms to employment rights and workplace practices.

Internationally, businesses were operating against a backdrop of evolving global trade policy, including the introduction of new US tariff measures and uncertainty around the potential implications for UK exporters and international trade. Fieldwork for Wave 10 concluded in November 2025 and therefore reflects business attitudes before the escalation of conflict in the Middle East during 2026; the findings in this report do not capture the impact that subsequent geopolitical developments may have had on business sentiment, trade activity or supply chains.

Exporting Behaviour: The proportion of businesses currently exporting has remained stable in 2025. However, since 2021 there has been a downward trend in the proportion of businesses who have ever exported (45% in 2021 to 35% in 2025), and for the first time is statistically significantly lower than levels seen between 2015 and 2020 (40% to 42%). Among goods exporters, the difference between those reporting increased export volumes versus those reporting decreased export volumes improved from -13% in 2024 to -5% in 2025, continuing a trend of gradual improvement. Among exporters of services, the equivalent figure remained stable at +2%, indicating broadly equal proportions reporting increases and decreases in export volumes. Nine in 10 (90%) businesses who had ever exported said they had exported to one of the 'core markets',¹ in line with 2024 (90%) but a decrease from 94% in 2023. Most businesses (86%) said they had exported to the EU, consistent with 2024.

Business Concerns: General concerns around COVID-19 decreased further in 2025 compared with 2024. Concerns about war or conflict, and industrial action were also reduced compared with 2024. However, this reflects attitudes at the time of fieldwork and does not capture the impact of the escalation of conflict in the Middle East during 2026, which occurred after data collection had concluded. Concerns relating to the UK's exit from the EU, economic/inflationary pressure, and rising energy prices continued to be prominent and were unchanged compared with 2024. A code relating to the 'rising cost of tariffs' was introduced in Quarter 2 of Wave 10, following the introduction of new US tariff measures. Concerns about tariffs were reported by 29% of businesses.

Exporting Barriers: Across all business capabilities for exporting such as adequate supply chains, financial resources, staff skills and staff capacity, findings were consistent with 2024. Thinking about respondents' ability to export to core markets, barriers relating to customs procedures and compliance regulations (53%), and administrative costs and regulations abroad (28%) were seen as the greatest barriers.

Free Trade Agreements (FTAs): Findings relating to FTAs were consistent with 2024. Among all £500K+ turnover businesses, three quarters (76%) had heard of FTAs, though only 1 in 5 (20%) reported any knowledge about them. Among businesses who have or could export ('Sustain', 'Reassure' and 'Promote' segments), 81% had heard of FTAs, with 1 in 5 (23%) knowing anything about them. Despite this, over 2 in 5 (45%) felt that FTAs would

¹ There were 5 overseas markets designated as 'core markets' at wave 10: the EU, the USA, the Gulf States, Australia and India and have been unchanged since wave 8. The EU was included as a core market for the first time in wave 8. These markets were chosen at the start of the 2025 wave on the basis of strategic significance for UK trade.

benefit their business (61% among current or previous exporters), and half (50%) felt FTAs would benefit their sector or industry (65% among current or previous exporters). Businesses reported low confidence in how to trade through an FTA, and a lack of information or support to access the benefits of FTAs, indicating a need for further guidance.

Information Sources and Awareness: The proportions of businesses that reported high levels of knowledge on how to export (19%), where to go for information (24%) or help and support about exporting (22%) were stable in 2025. The proportion of businesses who had ever sought advice or support about exporting (40%) also remained stable. GOV.UK pages remained the main source of government support on exporting and trade, both in awareness (54%) and use (36%), both unchanged since 2024, though remaining lower than 2023 (awareness: 68%, use 45%). Most services were still not familiar to or used by the majority of businesses.

Campaign Recognition: Around 1 in 5 businesses (21%) were able to recall the DBT 'Made in the UK, Sold to the World' (MIUK) campaign, an increase from 11% in 2024. Just over one-quarter of businesses who were able to view the MIUK campaign ads during the interview felt they were relevant to their business (29%). The campaign was largely seen to be clear (75%) and trusted (69%) sources of information. Seven in 10 agreed that the ads made it clear where to go for exporting information (70%), an increase from 57% in 2024. Fewer recognised the UK Export Academy campaign (8%).

1.3 Key findings by theme – (£500,000+ turnover businesses)

1.3.1 General exporting behaviours

The NSRB allocates businesses into 4 separate segments as described below (see also section 3.5 for segment definitions) to reflect their exporting behaviour. In 2025, businesses were distributed across these segments as follows:

- almost 3 in 10 (29%) of businesses had exported goods and/or services in the past 12 months and fell into the 'Sustain' segment
- additionally, 7% of businesses were either lapsed or intermittent exporters, meaning they had not exported in the last 12 months but had done so previously – these businesses made up the 'Reassure' segment
- a third segment, accounting for 18% of businesses, were those that had never exported before but believed that they could – these businesses reported having a product or service that they self-identified as being suitable, or could be developed to be suitable, for export, and formed the 'Promote' segment
- the final segment was made up of businesses that have never exported and did not see their goods or services as being suitable for export – this group is referred to as the 'Challenge' segment and accounted for 47% of all businesses
- a remaining 1% of businesses fell outside of these segment definitions, as they were unsure of their exporting potential or history

Figure 1.1: Percentage of respondents in each exporting segment from 2015 - 2025

Segment	2015	2016	2017	2018	2020	2021	2022	2023	2024	2025
Sustain	33%	33%	35%	33%	34%	35%	34%	31%	32%	29%
Reassure	8%	9%	7%	7%	6%	10%	9%	8%	6%	7%
Promote	11%	12%	12%	13%	15%	15%	15%	18%	17%	18%

Challenge	43%	41%	39%	38%	44%	38%	42%	42%	44%	47%
Not specified	5%	5%	7%	8%	1%	1%	1%	1%	1%	1%
Total (Base)	1,160	1,139	2,535	2,448	2,557	2,485	2,405	2,181	2,182	2,122

In 2025, 35% of respondents had exported before and 64% had never exported. This represents a continued downward trend since 2021 (45% in 2021 to 35% in 2025) and for the first time is statistically significantly lower than levels seen between 2015 and 2020 (40% to 42%). The overall trend arises through incremental changes across the 'Sustain' and 'Reassure' segments. The proportion of businesses in the 'Promote' segment has been trending up over the 8 waves of the NSRB though was stable in 2025, while the proportion of 'Challenge' businesses has fluctuated across years but remained stable in the past 12 months.²

Exporting behaviour in Northern Ireland (NI) remained high in comparison to the rest of the UK. However, a large proportion of NI businesses that exported did so only to the Republic of Ireland. In 2025, 36% of NI businesses reported that they had exported in the previous 12 months, but only to the Republic of Ireland. A further 13% said they exported both to the Republic of Ireland and overseas in the previous 12 months. Finally, 1% said they exported to overseas destinations only. These figures were in line with previous years.

The proportion of exporting businesses reporting either an increase or a reduction in their exports of goods and services in 2025 remained consistent with 2024. Among exporters of goods, almost 1 in 4 (24%) stated that their exports of goods had increased in the past 12 months, while 3 in 10 (29%) stated that they had decreased. For service exporters, 1 in 4 (26%) stated that their exports had increased in the past year, whilst a further 1 in 4 (25%) stated that exports had decreased.

Three in 4 exporters (75%) said that they were 'passive' in their exporting behaviour, meaning that they responded to orders from other countries but did not actively target these customers. Conversely, almost 1 in 4 exporters (23%) said they did actively target customers abroad, both in line with 2024. Almost 1 in 5 potential or lapsed exporters (18%) were planning to start or resume exporting at some point in the future, in line with previous years. This is equivalent to 4% of the whole £500,000+ business sample.

1.3.2 Barriers to exporting

Across all aspects of capabilities and capacity in relation to exporting that had been measured in previous years, findings were consistent with 2024. Businesses were most confident in having adequate supply chains (71%), the capabilities to assess demand for products or services (71%), to assess the cost of exporting (70%), to research and understand Free Trade Agreements (70%), or had the financial resources (69%) or staff skills (69%) to export. Perceptions of having the capability to research and understand Free Trade Agreements (up from 63% in 2023 to 70% in 2025), sufficient staff skills (up from 61% in 2023 to 69% in 2025), staff capacity (up from 52% in 2023 to 65% in 2025) and

² In 2020, the exporting segments were measured using a new set of questions in the NSRB questionnaire, which improved the allocation of respondents to segments, leaving fewer respondents unallocated. Questions have remained consistent since then. Most respondents were allocated to one of the 4 exporting segments, with a small number of unallocated businesses being those who reported being unsure of exporting behaviour, or who refused to answer questions necessary for the segmentation.

managerial time (up from 56% in 2023 to 64% in 2025) all improved over the last 2 years, but otherwise the overall picture was consistent.

Businesses who had exported or whose products could be developed for export were asked a set of questions on barriers to exporting, last asked in 2023.³ Around 6 in 10 (62%) of those who had exported goods before (to any market), and had exported or considered exporting to a core market, reported facing any barriers to their exports of goods. This was in line with 2023 but up from 45% in 2021. The most mentioned barrier to exporting goods was that relating to customs procedures (53%, up from 32% in 2021). These changes from 2021 are likely to be driven by the change in core markets and the inclusion of the EU as a core market from 2023. Reported barriers to exporting goods to the EU were higher than for other core markets (driven by barriers related to custom procedures), as they had been in 2023.

Just over 4 in 10 (43%) of those who had exported services before (to any market), and had exported or considered exporting to a core market, reported facing any barriers to their exports of services. In contrast to the equivalent measure for barriers to goods exports, this was unchanged from when it was previously asked in 2018, 2021 and 2023, and does not appear to have been impacted by the inclusion of the EU as a key market from 2023. Barriers faced were split fairly equally between those related to administrative costs, burdens and regulations abroad (28%), to the different treatment of domestic and foreign businesses (23%), and to the conditions for the supply of services abroad (22%). Unlike for exports of goods, there was no one barrier which stood out as being more likely to be faced by those exporting services to the EU than those exporting services to other core markets.

1.3.3 Free Trade Agreements (FTAs)⁴

Among businesses who have or could export ('Sustain', 'Reassure' and 'Promote' segments), 81% had heard of FTAs, though less than 1 in 4 (23%) reported knowing anything about them. Current or previous exporters ('Sustain' 28% and 'Reassure' 24%) were more likely to report knowledge of FTAs compared with potential exporters ('Promote' 15%).

Despite overall low knowledge levels, 56% of all respondents agreed that FTAs would benefit their business, which was higher among current and previous exporters (61%). However, just over a third (35%) felt that they are confident in knowing how to trade through an FTA, and fewer (24%) agreed that the government is providing information and support to help businesses access the benefits of FTAs. Agreement with these statements was consistent with 2024. For most businesses, GOV.UK was seen as the primary source they would use to find information about FTAs (73%). More than half mentioned the UK government (including DBT, 54%) or business or professional contacts (53%), though all had decreased compared with 2024.

Just over half (52%) of businesses who have ever exported reported that their goods or services were eligible for any FTA benefits, with the most commonly reported benefits being reduced customs duties (28%) and ability to easily transfer data between countries (22%).

³ Two sets of barriers questions alternate between waves, covering internal and external barriers. wave 10 covered external barriers, last asked in wave 8.

⁴ Free Trade Agreements set out the rules that cover trade between 2 or more countries and aim to make trading between these countries easier. This may include the removal or reduction of customs duties. See <https://www.gov.uk/government/collections/the-uks-trade-agreements>

1.3.4 Supply chains

In 2025, all businesses were asked about their experience of supply chains. Just under half (49%) reported any experience of supply chain issues, a decrease from 53% in 2024. Among these, 17% were currently experiencing supply chain issues, consistent with 2024, and 32% said these had been resolved.

Among all those who had experienced supply chain issues in the last 3 years, the most commonly cited causes for supply chain issues were the EU Exit (59%), general economic or inflationary pressure (54%) or COVID-19 (53%, a decrease from 63% in 2024). Other causes of supply chain issues included rising energy prices (42%), difficulty sourcing suitable or affordable parts (42%), the cost of shipping (40%), and war or conflict (31%, a decrease from 44% in 2024). A new code added in Q2 of Wave 10, rising costs of tariffs, was cited by 29%.

1.3.5 Export knowledge and support

One fifth of businesses who do or could export felt that they had a high level of knowledge of how to export (19%), while a greater proportion felt they had low knowledge (29%), unchanged from 20% and 31% in 2024, respectively.

Around 1 in 4 businesses felt they had a high level of knowledge about where to go for information on exporting (24%) or help and support (22%). Though not significant changes from 2024, these figures are both declines since 2018 (34% and 32% respectively), and the lowest ever reported. The proportion of those reporting a moderate level of knowledge about where to go for information about exporting (59%) and help and support with exporting (58%) both increased since 2024 (both 52%), and represents an upwards trend, with an increase from 2018 (44% and 46% respectively).

The proportion of businesses that do or could export who sought advice and support remained stable at 40% in 2025, compared with 43% in 2024.

Eight in 10 businesses that do or could export reported being aware of at least one UK government trade support service (80%), an increase from 72% in 2024. In line with previous years, the most common of these were GOV.UK tools 'check how to export goods' (54%). There was moderate awareness of business.gov.uk services 'report a trade barrier' or 'check international trade barriers' at 32%.

Awareness of International Trade Advisors (27%) and the Export Support Service (20%) were not significantly changed from 2024 (31% and 20%, respectively) but continued a decline from 38% and 31% in 2022.

Levels of usage were lower than their level of awareness, with GOV.UK tools 'check how to export goods' at 36%, business.gov.uk services 'report a trade barrier' at 12%, the Export Support Service at 7% and the UK Export Academy at 2%, all unchanged from 2024.

1.3.6 Expectations for growth and trade

In 2025, almost two thirds (65%) of businesses were aiming to grow, a slight, though not significant decrease from 68% in 2024. A further 23% were aiming for consolidation (again a slight but not significant increase from 20% in 2024) and 12% felt they needed to return to profitability.

Perceptions of there being a lot of demand for UK products and services around the world had been declining since 2020 (63% in 2020 to 52% in 2023). However, in 2024 this increased, with 62% agreeing with the statement, and remained stable in 2025 (61%). For reference, this measure peaked in 2017 when 73% thought there was a lot of demand and had been declining steadily since.

Other attitudes towards exporting were also stable in the last year. However, there has been an increase over the longer term in the proportion who feel there would not be enough demand for my business overseas to make it worthwhile (35%, up from 28% in 2020). There has also been a decrease in those who feel there is a lot of support available to help small and medium businesses start exporting (24% in 2025 down from 35% in 2020).

The balance of opinion on expectations for growth in the value of UK exports over the next 12 months has become more negative over the last year. There has been an increase in the proportion who felt the value of UK exports would decrease (30% in 2025 up from 22% in 2024). Almost a third (32%) felt that the value of exports will stay the same in the next 12 months (down from 38% in 2024), while around 1 in 5 (22%) felt that exports would increase, consistent with 2024 (24%).

1.3.7 Importing

Just under half of businesses stated that they had ever imported (45%), with 2 in 5 (38%) having imported in the last 12 months, consistent with 2024. In 2025, current exporters (those in the 'Sustain' segment) were most likely to have also imported in the last 12 months, and lapsed exporters ('Reassure') were most likely to have previously imported but not in the last 12 months, indicating that exporting and importing behaviour is closely related.

1.3.8 Advertising and campaign metrics

In 2021, high profile information and publicity around the EU Exit transition period contributed to higher awareness levels of communications activity on exporting. In 2022, awareness returned to the levels more typically seen in the years prior (28%), and has continued to incrementally decline to 22% in 2025.

Government remains the main source to which businesses attribute publicity around exporting. In 2025 general mentions of the UK government were unchanged (58% compared to 57% in 2024) as were specific mentions of the Department for Business and Trade or predecessor departments (16% in 2025, 14% in 2024).⁵

The 'Made in the UK, Sold to the World' campaign was DBT's principal export promotion marketing campaign, designed to shift business attitudes towards exporting by making international growth feel more achievable and desirable. The campaign showcased real UK exporter success stories across sectors and places, and signposted businesses to government export support. Paid marketing activity for the campaign ended on 31 March 2025, although some low-cost and no-cost export promotion activity continued under the campaign umbrella throughout 2025. The cross-government 'Backing Your Business' campaign is now established as the principal campaign on business support and includes export promotion. The 'Backing Your Business' campaign was not explored during wave 10 fieldwork, as in previous waves, the NSRB focus remained on the MIUK campaign.

The 'Made in the UK, Sold to the World' (MIUK) campaign was recognised by 21% of businesses, an increase from 11% in 2024, with fewer recognising ads for the UK Export Academy campaign (8%) or great.gov.uk help and support pages (8%). The 2025 MIUK campaign was largely seen as clear (75%) and a trusted source of information (69%). Agreement that the campaign made it clear where to go for exporting information increased from 57% in 2024 to 70% in 2025. However, agreement that the ads stood out from other ads or was relevant to them was lower at 46% and 27%, respectively. Businesses who

⁵ In previous waves, this referred to mentions of Department for International Trade (DIT) or Department for Trade and Industry (DTI). DBT came into existence in February 2023. Since the 2024 survey, mentions of Department for International Trade (DIT) or Department for Trade and Industry (DTI) were included in the DBT attribution figure.

recognised the ads were asked if they had taken any action as a result. Overall, 22% had either taken some action, planned to take action, or would consider doing so in future, unchanged from 21% in 2024.

2. Background

This chapter provides an overview of the policy background to the National Survey of Registered Businesses' exporting behaviours, attitudes and needs, as well as a summary of the aims of the survey. The full survey name has been abbreviated to 'the NSRB' throughout this report. Fieldwork for this wave (wave 10) of the NSRB took place across 2025.

2.1 DBT's objectives

The Department for Business and Trade is the department for economic growth. DBT supports businesses to invest, grow and export, creating jobs and opportunities across the country. The department plays a critical role in driving the government's manifesto commitments on industrial strategy, investment, small business, trade and employment rights.

The department's three objectives are outlined in its Operational Delivery Plan (ODP). This states the core outcomes of the Department for Business and Trade are to make the UK the best place in the world to do business and the best-connected global economy, whilst delivering great services to business.

2.2 Context

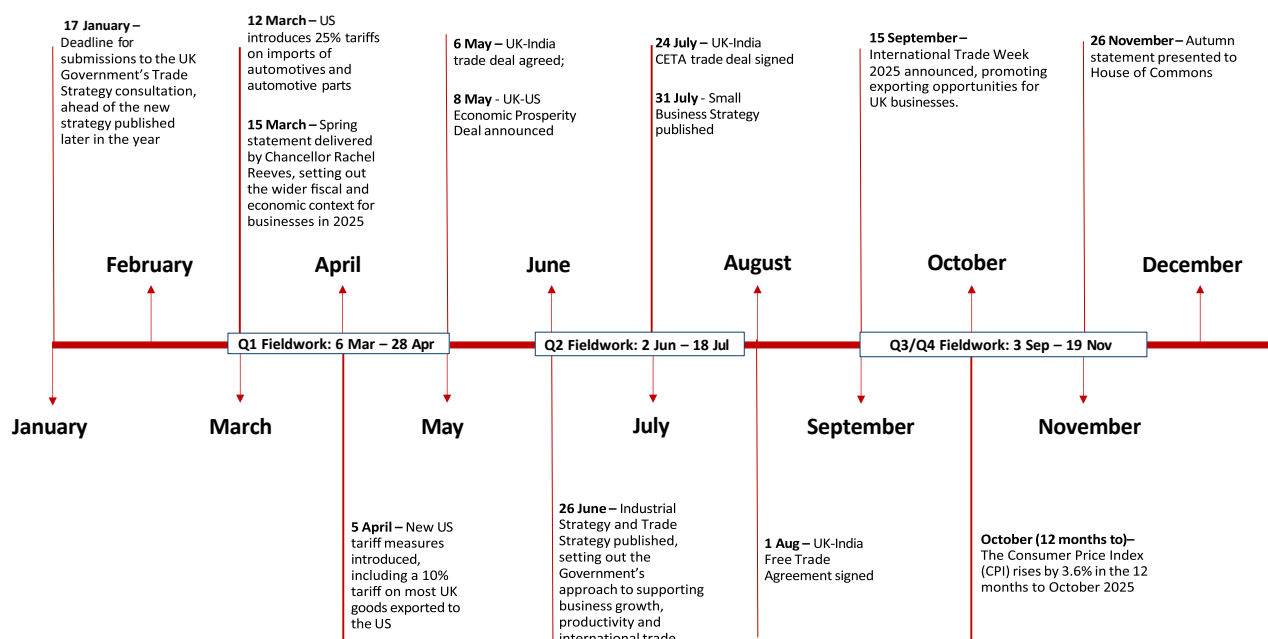
2.2.1 Timeline of relevant events

This survey year (2025) was set within the context of several new and ongoing events that have affected businesses both in the UK and around the world. In recent years, global trade has been under strain from the effects of the COVID-19 pandemic, and suffered further from shocks including high inflation, rising energy prices, tight financial conditions, economic slowdown in China, supply chain restrictions and the continued impact of Russia's invasion of Ukraine. In 2025, businesses were operating against a backdrop of evolving global trade policy, including the introduction of new US tariff measures and uncertainty around the potential implications for UK exporters and international trade.

Circumstances specific to the UK have also continued to have an influence on businesses, such as the UK's exit from the EU, as well as the Autumn 'Growth Plan' (mini budget) that was introduced by the previous government in September 2022 and the 2024 General Election leading to a change in government in July 2024. All data from Wave 10 was collected under the new, Labour, government. During 2025, a number of new policy frameworks were introduced, including the [Industrial Strategy](#) and [Trade Strategy](#), both launched in June 2025, and the [Small Business Strategy](#) (July 2025), which together set out the government's approach to supporting business growth, productivity and international trade. Alongside these strategies, 2025 also saw continued policy development in areas affecting the business environment, including progression of the Employment Rights Bill, which set out proposed reforms to employment rights and workplace practices.

Fieldwork for Wave 10 concluded in November 2025 and therefore reflects business attitudes before the escalation of conflict in the Middle East during 2026; the findings in this report do not capture the impact that subsequent geopolitical developments may have had on business sentiment, trade activity or supply chains.

Figure 2.1: Summary of key events potentially impacting business in 2025



2.2.2 EU Exit and future trade

The United Kingdom European Union membership referendum took place on 23 June 2016. This was an important contextual factor which was highly likely to have impacted on the data collected in waves 2 to 6 of the NSRB.

- Wave 2 of the NSRB was conducted in 2016 in the run-up to the referendum, at which point businesses would have been exposed to arguments both for and against EU membership and the potential impacts on future trading arrangements.
- Waves 3 (2017) and 4 (2018/19) were conducted in the aftermath of the referendum result and against a background where there had been ongoing and extensive discussion of matters that would have a direct impact on exporting.
- Wave 5 (2020) fieldwork was conducted after the beginning of the transition period. The transition period was a time during which the UK and EU decided their future relationship post-EU withdrawal. This began on 1 January 2020 and ended on 31 December 2020, during which time the UK remained in the EU customs union and the single market. It was only towards the latter end of 2020 that clarification about the UK's future trading relationship with the EU and wider world emerged, enabling businesses to better plan their futures.

EU Exit officially came into effect following the end of the transition period on 31 December 2020. By the start of May 2021, the EU / UK Trade and Cooperation agreement had been ratified. Wave 6 (2021) fieldwork was conducted throughout this post-transition period. According to the ONS, the end of the EU transition period was cited as the primary reason for challenges in exporting and importing goods (compared with services). Companies reported difficulties with finding staff in the UK resulting in the need to import more services,

issues with suppliers because of shortages of materials, fuel, and drivers, and the requirement for additional paperwork and fees leading to increased costs.⁶

Throughout 2020 and the majority of 2021, DBT campaign activity was reduced to make way for a high-profile campaign about the EU Exit transition.

2.2.3 Disruption across the world due to conflict

One of the most significant international developments affecting businesses over recent years has been Russia's full-scale invasion of Ukraine in February 2022. In coordination with allies around the world, the UK government implemented a range of sanctions on Russia and Belarus, including import tariff increases and the withdrawal of Most Favoured Nation (MFN) status. The conflict continued to influence global trade and business conditions during 2025 through its effects on energy markets, commodity prices and supply chains.

The end of 2023 and throughout 2024 also saw conflict in the Middle East and disruption to shipping routes through the Red Sea, contributing to wider uncertainty for international trade. While these issues evolved over time, they continued to affect international trade and supply chains during 2025 and formed part of the wider global trading environment in which businesses were operating. This was accompanied by evolving global trade policy, including the introduction of new US tariff measures and uncertainty about the implications for exporters, supply chains and international trade.

2.2.4 Economic instability and inflation

UK economic growth remained modest during 2025, with ONS estimates indicating that GDP increased by 1.3% over the year, compared with 1.1% in 2024. Inflation remained below the elevated levels experienced in 2022 and 2023, although it increased compared with 2024. The Consumer Prices Index (CPI) inflation rate averaged 3.4% during 2025, compared with 2.5% in 2024 and 7.4% in 2023. Businesses therefore continued to face cost pressures, including labour costs, input prices and financing costs.

Interest rates remained above pre-pandemic levels for much of 2025, reflecting the Bank of England's efforts to return inflation to its 2% target. While the economic environment was more stable than in recent years, business confidence and investment continued to be influenced by ongoing cost pressures and uncertainty about future economic conditions in domestic and international markets.

Other factors influencing the UK business environment during the Wave 10 fieldwork period likely included the introduction of new policy initiatives by the Labour government, including the Industrial Strategy, Trade Strategy and Small Business Strategy, and wider international developments such as the introduction of new US tariff measures and ongoing geopolitical uncertainty.

2.2.5 COVID-19

The COVID-19 outbreak in the UK began in early 2020 and rapidly grew to affect UK and international businesses to varying degrees. Throughout 2020 and 2021, the UK experienced a series of lockdowns and public health measures including social distancing, mask wearing and business or venue closure. By the start of 2022, national restrictions

⁶ See: Office for National Statistics, The impacts of EU Exit and coronavirus (COVID-19) on UK trade in services: November 2021. Released 22 November 2021 at <https://www.ons.gov.uk/releases/theimpactsofeuexitandcoronaviruscovid19onuktradeinservicesnovember2021>

began to be eased, with 'Plan B' measures lifted across the UK on 27 January, and all legal restrictions around COVID-19 officially lifted in England on 24 February 2022.

By 2023, impacts of COVID-19 were less prominent, and this continued further in 2024 and 2025. However, businesses were still likely to be affected in the longer term by the issues arising during the period between 2020 and 2022. As such, this will likely have continued to affect how businesses answered questions and should be considered when interpreting results across different waves of the NSRB.

3. Survey methodology

This chapter provides an overview of the survey methodology and contains information which is important for readers be aware of. Further details of the survey methodology are included in the Technical Report which is published alongside this main report.

Key points to acknowledge when reading this report are as follows:

- the NSRB was conducted using a CATI method (Computer Assisted Telephone Interviewing)
- interviews were undertaken with the senior manager at each participating business who was best qualified to talk about specifics of the business – this was typically the owner, proprietor, managing director or another senior decision-maker
- there are 2 separate data sets:
 - the annual findings of surveyed UK registered businesses with a turnover of £500,000+, weighted to be representative of this group
 - the annual findings of surveyed UK registered businesses weighted to be representative of the total population of UK registered businesses
- data were collected at an enterprise level (that is where respondents provide answers relating to their organisation as a whole, rather than at branch or site level)
- there are margins of error around the survey data quoted in this report and some apparent trends in charts may not be statistically significant
- written commentary focuses on findings where significance testing indicates that we can be confident the survey data show statistically significant change in relation to previous waves, i.e. unless otherwise stated, where change is discussed, these patterns are statistically significant.
- the sample sizes of waves 3 to 10 are larger than those of earlier waves (and the margins of error surrounding data from these later waves are, accordingly, smaller)
- for some regional analysis, aggregated regions are occasionally used: North (covering North-West England, North-East England and Yorkshire and the Humber), and Midlands (covering East Midlands and West Midlands)
- chart footnotes below each chart provide reference to the source question number or name and question text, and the unweighted base (number of businesses who answered the question)

3.1 The objectives of the NSRB

The NSRB functions to support DBT's objectives. It is a strategic survey for the department, used by policy and strategy stakeholders across government to monitor businesses' exporting behaviours, plans, capabilities and attitudes towards exporting. It is also used as an evaluation tool for measuring the performance of DBT's communications campaigns.

Relating to the first of these aims, the NSRB is designed to:

- measure the size of the opportunity and challenge for DBT in terms of the proportion and number of companies at different stages of the exporting journey
- ascertain business attitudes to trade and exporting
- give information on barriers to exporting and how they might be addressed
- identify the level of business interest in, and engagement with, exporting support and advice
- highlight skills, resource, and knowledge gaps among businesses
- identify the barriers preventing or hindering businesses from exporting
- understand the perceived impact of Free Trade Agreements on businesses
- investigate businesses' knowledge and perceptions of Free Trade Agreements
- investigate businesses' experience of supply chain issues and resolution

3.2 Sample and fieldwork design

The sample for all 10 waves of the NSRB was drawn from the Inter-Departmental Business Register (IDBR). The IDBR provides the main sampling frame for surveys of businesses carried out by the Office for National Statistics (ONS) and other government departments. It covers approximately 2.7 million businesses in all sectors of the UK economy, other than very small businesses (those without employees and with turnover below the tax threshold) and some non-profit making organisations. The 2 main sources of input are Value Added Tax (VAT) and Pay As You Earn (PAYE) records from HMRC. Additional input comes from Companies House, Dun and Bradstreet and ONS business surveys.⁷ When drawing the sample for the NSRB, it was specified that businesses with a turnover of less than £500,000 must also be VAT registered to be included in the sample.

Businesses with £500,000+ turnover were oversampled relative to their true proportion in the underlying population, reflecting DBT's focus on High Export Potential (HEP) businesses. This allowed for more robust sub-group analysis when examining the set of businesses with £500,000+ turnover, which is the primary focus of this report. However, this sampling approach has limited the analysis of the total sample of all businesses. The weighting scheme required to compensate for the smaller proportion of lower turnover businesses results in a lower effective base size and larger margins of error around the all-business estimates.

The sample was stratified, and quotas were applied to ensure that the required number of interviews were achieved with companies of various sizes and based in different regions across the UK.

The findings from all 10 waves are referenced in this report. However, for readability, in most cases charts display data from Wave 5, or from the Wave the question was introduced into the survey. At wave 5, a new quarterly approach was introduced to the survey, which was continued for each subsequent wave. This quarterly approach allowed the questionnaire

⁷ Information about the IDBR is available online from the ONS
<https://www.ons.gov.uk/aboutus/whatwedo/paidservices/interdepartmentalbusinessregisteridbr>

design to be more flexible to DBT's changes of priority and to political and current affairs which may have very significant impacts on businesses' exporting attitudes and behaviours. In the most recent wave for 2025 (wave 10), a minimum of 750 interviews were targeted per quarter. Wave 10 quarter 3 and quarter 4 fieldwork was concluded early, due to new IDBR sample use restrictions. The timing of fieldwork for each wave was as follows:

- Wave 1: 20 October to 6 November 2015
- Wave 2: 1 April to 4 May 2016
- Wave 3: 26 July to 7 September 2017
- Wave 4: 23 October 2018 to 4 January 2019
- Wave 5 quarter 1: 3 February to 20 March 2020
- Wave 5 quarter 2: 5 June to 10 July 2020
- Wave 5 quarter 3/ quarter 4: 5 November to 14 December 2020
- Wave 6 quarter 1: 1 February to 11 March 2021
- Wave 6 quarter 2: 10 May to 14 June 2021
- Wave 6 quarter 3: 9 August to 17 September 2021
- Wave 6 quarter 4: 1 November to 15 December 2021
- Wave 7 quarter 1: 21 February to 7 April 2022
- Wave 7 quarter 2: 2 May to 16 June 2022
- Wave 7 quarter 3/ quarter 4: 20 September to 13 December 2022
- Wave 8 quarter 1: 27 February to 31 March 2023
- Wave 8 quarter 2: 19 April to 30 May 2023
- Wave 8 quarter 3/ quarter 4: 23 August to 23 November 2023
- Wave 9 quarter 1: 8 March to 7 May 2024
- Wave 9 quarter 2: 10 July to 28 August 2024
- Wave 9 quarter 3/ quarter 4: 26 September 2024 to 9 January 2025
- Wave 10 quarter 1: 6 March to 28 April 2025
- Wave 10 quarter 2: 2 June to 18 July 2025
- Wave 10 quarter 3/ quarter 4: 3 September to 19 November 2025

The survey data are not longitudinal – a separate sample of businesses was interviewed at each wave.

The NSRB collects enterprise level data whereby respondents give answers in relation to their organisation as a whole rather than focusing on smaller reporting units within the organisation. This means that the NSRB reports a higher incidence of exporters than is found in surveys which publish data based on reporting units (given that many businesses

will comprise some reporting units which export and some reporting units which do not). The Annual Business Survey is the UK's main structural business survey which provides reporting-unit level data.⁸

3.3 Sample size and effective base sizes

The unweighted sample sizes achieved in each wave are shown in Figure 3.1 and the quarterly breakdown for wave 10 in Figure 3.2.

All waves of the survey were weighted to ensure that they matched the profile of businesses on the IDBR at the time the sample was drawn in terms of:

- Business turnover interlocked with number of employees
- Region
- Broad sector

Both sets of data that have been produced are weighted on the above factors. The first data set is based only on £500,000+ turnover businesses (the focus of Chapters 4-11). The second is based on the total population of registered businesses (the focus of Chapter 12).

The effective base sizes for each of these data sets are also shown in Figure 3.1 and in Figure 3.2. The effective base size takes account of the reduction in statistical reliability associated with weighting data and is the value which is used in any significance testing conducted throughout this report. Chart footnotes report unweighted bases throughout, reflecting the raw number of businesses who answered each question underlying the weighted proportions reported. Where base sizes are low and as such findings should be treated with caution, this is noted in the chart notes. See the accompanying technical report for further details of the weighting schemes.

⁸ See:

<https://www.ons.gov.uk/surveys/informationforbusinesses/businesssurveys/annualbusinesssurvey>

Figure 3.1: Unweighted and effective base sizes by data set

Sample	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6	Wave 7	Wave 8	Wave 9	Wave 10
£500,000+ businesses – unweighted base	1,160	1,139	2,535	2,448	2,557	2,485	2,405	2,181	2,182	2,122
£500,000+ businesses – effective base	922	909	1,617	1,319	1,457	1,080	1,422	1,471	1,487	1,392
All businesses – unweighted base	1,405	1,418	2,991	3,000	3,001	3,002	3,001	3,004	2,969	2,894
All businesses – effective base	347	405	550	635	529	674	855	1,199	1,241	1,207

Figure 3.2: Unweighted and effective base sizes by quarter, wave 9

Sample	Quarter 1	Quarter 2	Quarter 3/ Quarter 4
£500,000+ businesses – unweighted base	545	547	1,030
£500,000+ businesses – effective base	316	360	721
All businesses – unweighted base	750	750	1,394
All businesses – effective base	317	317	576

3.4 Statistical significance

Survey data is subject to error. In most cases, the responses obtained from a survey sample will not perfectly reflect the wider population that the sample represents. For example, bias may be introduced depending on the unwillingness of certain respondents to participate in the survey.

The contact sample for this survey is originally drawn using a stratified sampling approach, then quotas are set for interviewers to fill to ensure that some sub-groups of the population are over-sampled, with the intention that base sizes for these subgroups can be sufficiently large to provide robust results. For example, businesses with a turnover of more than £500,000 are over-sampled.

Confidence Intervals are used to provide a range (based on the sample) within which the true value (in the whole study population) is expected to lie, a certain percentage of the time. For the NSRB we use a 95% confidence interval, meaning that we accept that 5% of the

time the true value will fall outside of the confidence limit. However, as confidence intervals rely on a known probability of selection, with a quota sample – like this in this study – the probabilities of selection are not equal or known and so confidence intervals do not apply in the traditional sense. Similarly, formal significance tests cannot be used with quota sampling for similar reasons.

Despite this, we have still turned to confidence intervals to give an idea of the uncertainty around the results and significance testing has been used throughout this report to guide our commentary.⁹ Charts also highlight where differences across waves or between sub-groups are sufficiently large to note.

Confidence intervals and significance testing have been applied in the way that they would for data generated from a random probability sample. The effective base, which considers the reduction in statistical reliability associated with weighting the data, is used in the significance testing as opposed to the unweighted or weighted base. Significance tests considered in this report are two-tailed, that is, they test for a difference between two results at the 95% confidence level, rather than for an increase or a decrease. It must be made clear that since the data has been generated from a quota sample, none of the findings in this report are statistically significant in the conventional sense; that is, being able to assume to within a stated degree of probability that they also apply to the wider population. Where 'significance' is referenced, this is only intended as a guide as to which findings are notably different. Given the multiple factors such as the effective base and design weight that influence 'significance', this also means that the absolute size of the difference between two proportions does not alone determine whether the difference is statistically significant. For example, a 5% difference between two proportions may in one case be a significant difference, and in another case it may not.

3.5 Segment definitions

DBT groups all UK businesses into 4 segments that reflect businesses' views on their potential to export. At wave 5, some amendments were made to questions used to define the segments. These changes have enabled DBT to group businesses by segment more accurately and have substantially reduced the numbers of businesses unallocated to a segment whilst keeping proportions in each segment consistent. For more on this, please see the wave 5 technical report.¹⁰

The 4 segments are outlined in Figure 3.3 below:

⁹ Commentary throughout the report focuses on data that, in an equivalent random probability sample, would be statistically significant at a 95 per cent confidence level. This means that if the survey were to be conducted 100 times, a finding of the same nature (for example sub-group A is more likely to respond in a certain way than sub-group B) would be found on at least 95 occasions.

¹⁰ See: Department for International Trade, DIT National Survey of Registered Businesses Technical Report – wave 5, 16 June 2021: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/994096/dit-national-survey-of-registered-businesses-exporting-behaviours-attitudes-and-needs-2020-technical-report-wave-5.pdf

Figure 3.3: Exporting segments

Sustain (current exporters): businesses that have exported goods or services in the past 12 months
Reassure (lapsed exporters): businesses that have not exported in the past 12 months, but had exported previously
Promote (potential exporters): businesses that have never exported but self-identify as having goods or services that could potentially be exported or developed for export
Challenge (non-exporters): businesses that have never exported and do not currently see their goods or services as suitable for export

4. Current and future exporting behaviours – (£500,000+ turnover businesses)

This chapter examines whether UK businesses are currently exporting and, if not, whether they potentially could. It also investigates how this has changed over time, and whether businesses are planning to start exporting.

Overall, findings are broadly consistent with previous years, although there is a continuing decline in the proportion of businesses which have exported before. This is particularly the case for exports of goods, with exports of services being more stable. However, there has been an improvement in the balance between businesses reporting a decline and those reporting an increase in their exports of goods.

Key findings

- In 2025, 3 in 10 (29%) businesses reported exporting¹¹ in the last 12 months, while a further 7% reported exporting more than 12 months ago but not in the last 12 months. As such, a total of 35% of businesses had direct experience of exporting (whether current or past). There has been a steady downward trend in the proportion of businesses which have exported before (from 45% in 2021 to 35% in 2025). This has been driven by declines in both the proportion of current exporters (from 35% to 29%) and in the proportion of businesses which had exported more than 12 months ago but not in the last 12 months (from 10% to 7%).
- In line with previous years, businesses in Northern Ireland were more likely to be current exporters (49%) than those in the rest of the UK, although this is driven by exports to the Republic of Ireland, with very few Northern Irish businesses exporting solely to overseas destinations.
- The sectors containing the largest proportion of current exporters were information and communication (51%) and manufacturing, raw materials and energy (48%), followed by professional and services (38%) and wholesale and retail (36%).¹² This is in line with previous years. Businesses in key Industrial Strategy (IS) sectors¹³ were more likely than those in non-IS sectors to have exported in the last 12 months (39% compared with 25%).
- 2 in 10 (20%) businesses had exported goods in the past 12 months. This has been trending downwards from 27% in 2021. The proportion of businesses which had

¹¹ This was self-reported by respondents, who stated that they had exported either goods or services outside of the UK. Goods are defined as physical, consumable items that are exchanged/transferred between a buyer and a seller. Services are defined as transactions in which knowledge, actions or skills are provided by the seller to the buyer, and no physical goods are transferred. Services include intangible goods, such as digital goods, where the consumer does not own the intellectual property but is instead accessing it via a digital platform (such as music streaming).

¹² Businesses were classified into sectors during the survey interview. The sectors shown in this report are based on UK SIC (2007) sections, with some sectors combined for reporting purposes. See the Technical Report for full details.

¹³ Questions to identify businesses in key IS (Industrial Strategy) sectors were new for 2025.

exported services in the past 12 months has remained more stable over recent years (12% in 2025).

- As has been the case in previous years, those who had exported goods in the past 12 months were more likely to report a reduction (29%) than an increase in these exports (24%). However, the gap between the proportion of businesses reporting a reduction and those reporting an increase in exports has been steadily reducing, most notably driven by a decrease in the proportion of exporting businesses which reported a decline in their exports. Among those who had exported services in the previous 12 months, a similar number reported a reduction (24%) as reported an increase (26%) in these exports. This is in line with previous years.
- 3 in 4 (75%) businesses which had exported before stated that they respond to orders from abroad, but do not specifically target customers in other countries (essentially 'passive' in their exporting behaviour), while 1 in 4 (23%) took a more active approach, intentionally targeting customers in specific countries. Both of these results are in line with previous years.
- 9 in 10 (90%) current and lapsed exporters had exported to at least one of the core markets in the past 5 years. These 'core markets' have been defined since 2023 as the EU, the USA, the Gulf States, Australia and India. Almost all current and lapsed exporters (86%) had exported to the EU in the past 5 years and almost half (46%) had exported to the USA. There was a decline in the proportion of current and lapsed exporters which had exported to the Gulf States in the past 5 years (from 35% in 2024 to 28% in 2025). The proportion which had exported to other core markets remained stable.
- There continued to be a substantial pool of businesses with self-reported potential for exporting, but who were not currently doing so (those businesses in the 'Promote' and 'Reassure'¹⁴ segments). The majority of these, however, did not have plans to start exporting (82% and 78% respectively).

4.1 Current exporting behaviours

This section focuses on the exporting segments outlined in Figure 3.3. These segments provide a summary of where businesses are positioned on their exporting journey. In 2020, the exporting segments were measured using a new set of questions in the NSRB questionnaire, which improved the allocation of respondents to segments, leaving fewer respondents unallocated. Questions have remained consistent since then. Most respondents were allocated to one of the 4 exporting segments outlined in Figure 3.3, with a small number of unallocated businesses being those who reported being unsure of exporting behaviour, or who refused to answer questions necessary for the segmentation.

As shown in Figure 4.1, 3 in 10 (29%) businesses had exported either goods or services in the past 12 months and fell into the 'Sustain' segment. A further 7% were lapsed exporters, who had exported before but not in the past 12 months, known as the 'Reassure' segment. As such, a total of 35% of businesses had direct experience of exporting (whether current or past).

Around 1 in 6 (18%) businesses had never exported but self-identified as having goods or services that were suitable, or which could be developed, for export – constituting the 'Promote' segment. This is the group from which brand-new exporters are most likely to

¹⁴ See section 3.5 'Segment Definitions' for a full explanation.

come. Given that the population of registered businesses with a turnover of at least £500,000 is 521,000,¹⁵ the number of businesses in the 'Promote' segment is estimated to be between 81,000 and 102,000 in 2025.¹⁶ This is slightly higher than 2024, when there were between 76,000 and 95,000 businesses in the 'Promote' segment. The increase is driven by small increases in both the total number of registered businesses with a turnover of at least £500,000 (508,000 in 2024) and in the proportion of promote businesses (17% in 2024).

Combining the number of potential brand-new exporters in the 'Promote' segment with lapsed exporters in the 'Reassure' segment, who could restart their exporting journey, there are potentially 24% of UK businesses with turnover of at least £500,000 who could start or resume exporting in the future. This equates to between 115,000 and 138,000 businesses.¹⁷

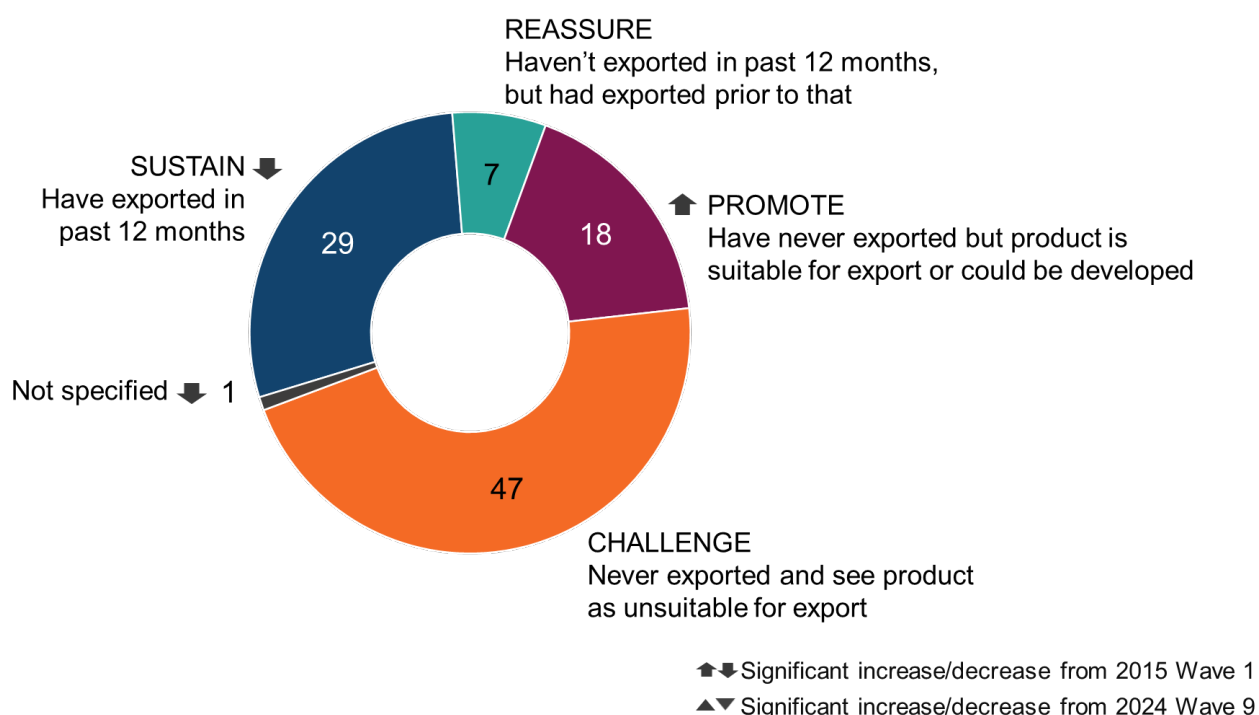
The 'Challenge' segment, comprising businesses that have never exported and who view their product or service as unsuitable for export, accounted for almost half (47%) of all businesses in 2025. The remaining 1% of businesses fell outside the segment definitions and were typically uncertain of their exporting potential or history

¹⁵ Population count taken from the Inter-Departmental Business Register (IDBR) which was drawn by DBT and provided to Verian on 24 January 2025.

¹⁶ The unrounded proportion of businesses in the 'Promote' segment was 17.53%. There is a margin of error of $\pm 1.999\%$ associated with the survey estimate at a 95% confidence level and so the proportion of businesses in this segment is estimated to lie between 15.53% and 19.53%. The lower estimate is therefore 15.53% of 521,000 and the upper estimate is 19.53% of 521,000, which give rounded values of 81,000 and 102,000 respectively. The provisos for the calculation of confidence intervals on quota samples outlined in chapter 3 also apply here.

¹⁷ The unrounded proportion of businesses in the 'Promote' and 'Reassure' segments combined was 24.33%. There is a margin of error of $\pm 2.256\%$ associated with the survey estimate at a 95% confidence level and so the proportion of businesses in this segment is estimated to lie between 22.07% and 26.59%. The lower estimate is therefore 22.07% of 521,000 and the upper estimate is 26.59% of 521,000, which give rounded values of 115,000 and 138,000 respectively. The provisos for the calculation of confidence intervals on quota samples outlined in chapter 3 also apply here.

Figure 4.1: Proportion of businesses in each exporting segment (% all respondents)



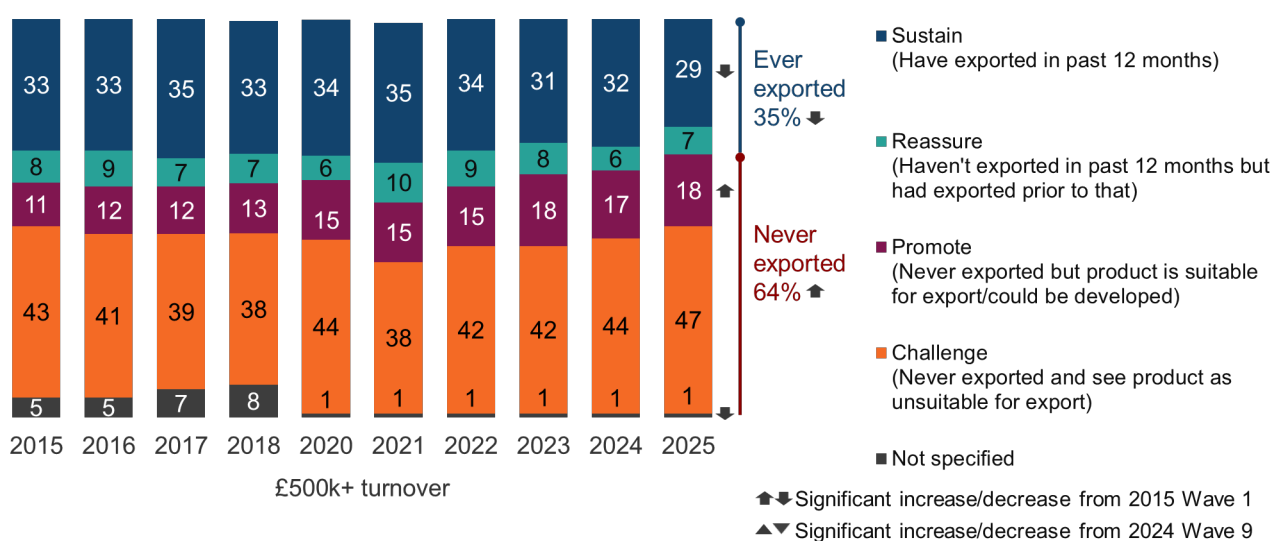
Source: Composite measure merging data from several variables.

Base: All respondents: £500,000+ turnover 2025 W10 (2,122)

Since 2021 (wave 6), there has been a steady downward trend in the proportion of businesses who have exported before (from 45% in 2021 to 35% in 2025). This has been driven by declines in the proportion of businesses in both 'Sustain' (from 35% to 29%) and 'Reassure' (from 10% to 7%) segments. Over the same period, the proportion of 'Challenge' businesses increased from 38% to 47% (Figure 4.2).

The proportion of businesses in the 'Promote' segment has been trending upwards over the 10 waves of the NSRB (from 11% in 2015 to 18% in 2025), although this has levelled off since 2023.

Figure 4.2: Proportion of businesses in each exporting segment over time (% all respondents)



Source: Composite measure merging data from several variables.

Base: All respondents: 2015 W1 / 2016 W2 / 2017 W3 / 2018 W4 / 2020 W5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: All £500,000+ turnover (1,160 / 1,139 / 2,535 / 2,448 / 2,557 / 2,485 / 2,405 / 2,181 / 2,182 / 2,122)

In 2025, there were no statistically significant differences in segment profiles by business size and the downward trend in exporting since 2021 was apparent across all business sizes.

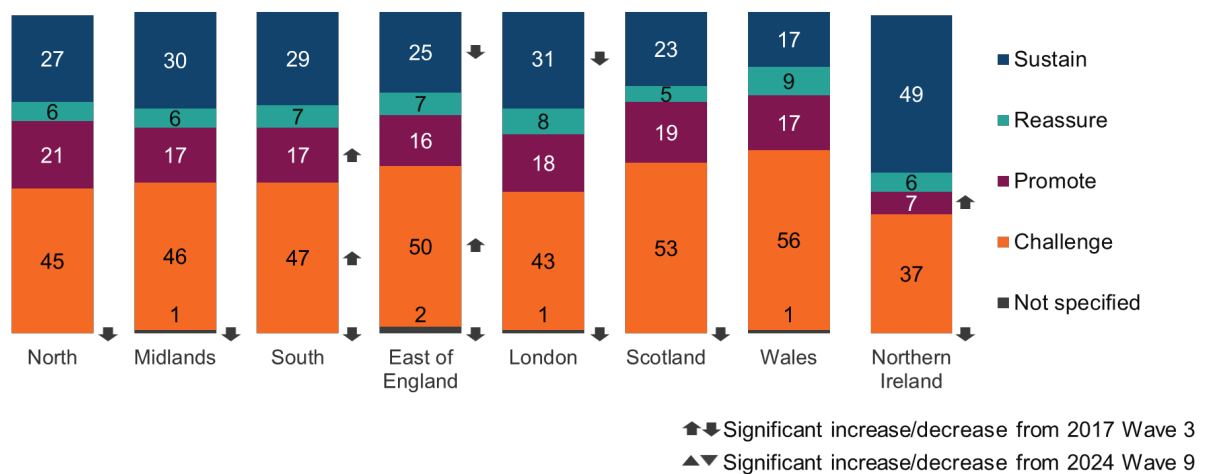
When looking at the results at the national and regional levels, some care is required when interpreting the results given smaller sample bases. What is evident is that, as in previous years, businesses in Northern Ireland (49%) were more likely to be current exporters (in the 'Sustain' segment) than those in other regions, where the proportion of businesses in the 'Sustain' segment ranged from 17% in Wales to 31% in London (Figure 4.3). Correspondingly, Northern Ireland also had the smallest proportion of 'Challenge' businesses (37%), compared with between 43% to 50% in most other regions, rising to 53% in Scotland and 56% in Wales.

It is worth noting that although exporting behaviour in Northern Ireland appears to be high in comparison with the rest of the UK, a sizeable proportion only export to the Republic of Ireland. In 2025, 36% of Northern Irish businesses reported that they had exported in the past 12 months but only to the Republic of Ireland, while 13% said they exported both to the Republic of Ireland and overseas, and 1% exported to overseas destinations only. This is a similar pattern to previous years.

Across all regions, the year-on-year picture was stable, with no significant changes from 2024. However, the trend of declining numbers of exporters since 2021 was apparent across all regions, although this was not significant in all regions (in part due to small sample sizes in some of the regions¹⁸).

¹⁸ A larger movement is necessary for a change to be statistically significant when the sample size is smaller.

Figure 4.3: Proportion of businesses in each exporting segment by super-region¹⁹ and region (% all respondents)



Source: Composite measure merging data from several variables.

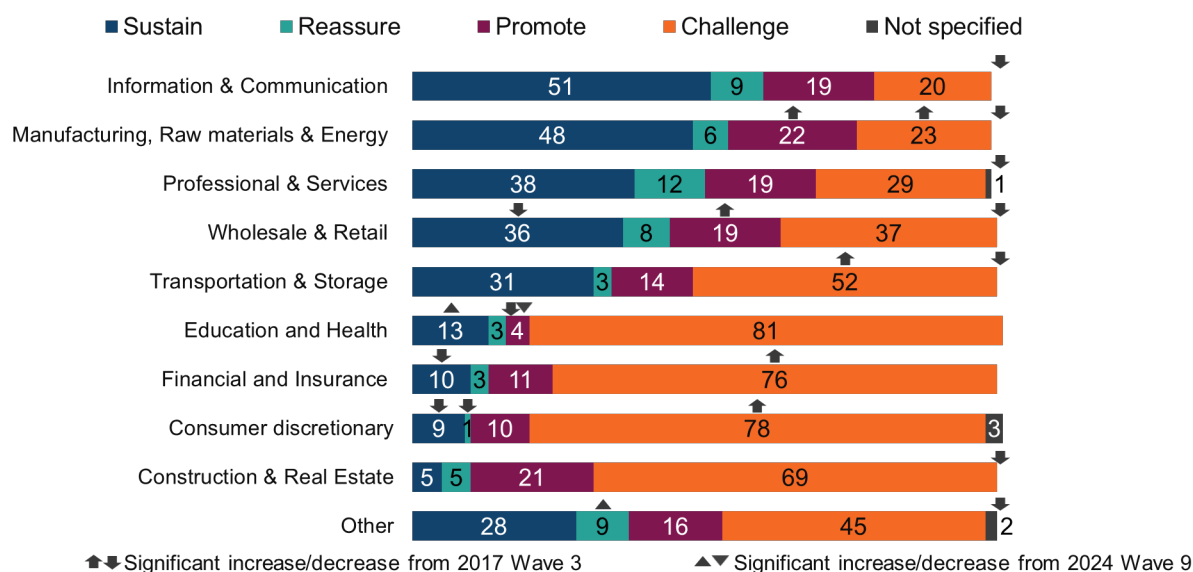
Base: All respondents: 2025 W10: All £500k+ turnover (2,122); North (333); Midlands (299); South (506); East of England (217); London (251); Scotland (176); Wales (171); Northern Ireland (169)

As shown in Figure 4.4, businesses in the information and communication and the manufacturing, raw materials and energy sectors were particularly likely to have exported in the last 12 months (51% and 48% respectively). For both these sectors, this was consistent with previous years. Just under 4 in 10 businesses in professional and services (38%) and wholesale and retail (36%) sectors also fell into the 'Sustain' segment, which was again consistent with previous years. As in previous years, there was low prevalence of current exporters in the construction and real estate (5%), consumer discretionary (9%), financial and insurance (10%), and education and health (13%) sectors, with these businesses more likely to be in the 'Challenge' segment (69%, 78%, 76% and 81% respectively).

In 2024, the proportion of education and health businesses in the 'Sustain' segment fell to 3% (from 12% in 2023). However, this returned to 13% in 2025, which is a more typical level, although there is often some fluctuation in segment sizes within this sector.

¹⁹ The super-regions are the North (comprising the North East, North West, and Yorkshire and the Humber), Midlands (comprising East Midlands and West Midlands) and South (comprising the South East and South West)

Figure 4.4: Proportion of businesses in each exporting segment by sector (% all respondents)



Source: Composite measure merging data from several variables (Q15A, Q15Ai, Q15B, Q15Bi, Q17A, Q17Ai, Q17B, Q17Bi, Q19A)

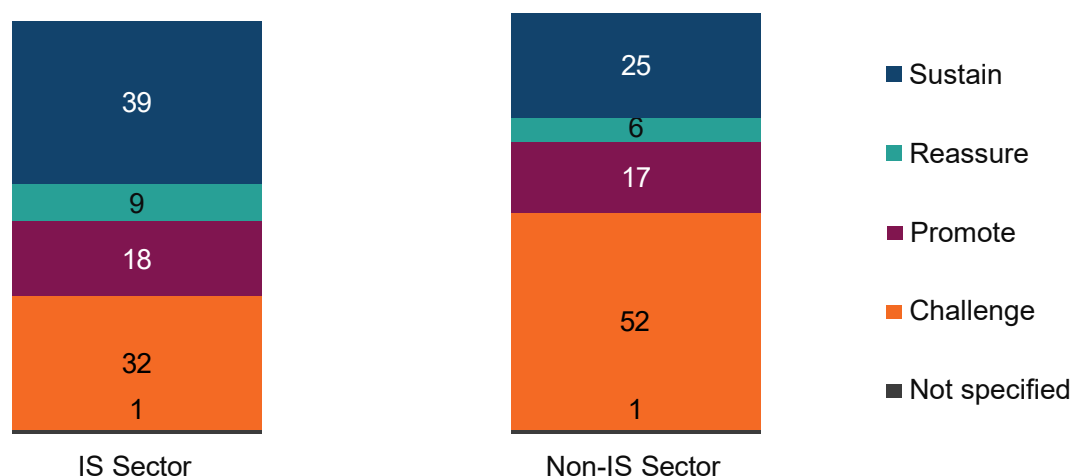
Base: All £500,000+ turnover respondents: 2025 W10: Construction & Real Estate (283); Consumer discretionary (135); Financial and Insurance (47*); Education and Health (143); Manufacturing, Raw Materials & Energy (380); Information & Communication (73*); Other (155); Wholesale & Retail (551); Professional & Services (282); Transportation & Storage (73*)

* Base size is below 100; treat with caution

In 2025, the NSRB survey included new questions to identify businesses in key Industrial Strategy (IS) sectors. Overall, 27% of businesses were classified as being in an IS sector, which included professional and business (12%), creative industries (5%), financial services (5%), advanced manufacturing (3%), and digital and tech (2%). Other IS sector businesses included those in clean energy, life sciences, and defence, each of which accounted for less than 1% of the survey population. As the number of businesses in most of the IS sectors is very small, they have been aggregated for reporting purposes.

Figure 4.5 shows the proportion of businesses in each exporting segment according to whether they are classified as an IS sector business or not. Almost half (48%) of IS sector businesses had ever exported, compared with 31% of non-IS sector businesses, with 39% having exported in the last 12 months (compared with 25% of non-IS sector businesses).

Figure 4.5: Proportion of businesses in each exporting segment by IS sectors vs. non-IS sectors (% all respondents)



Source: Composite measure merging data from several variables (Q15A, Q15Ai, Q15B, Q15Bi, Q17A, Q17Ai, Q17B, Q17Bi, Q19A)

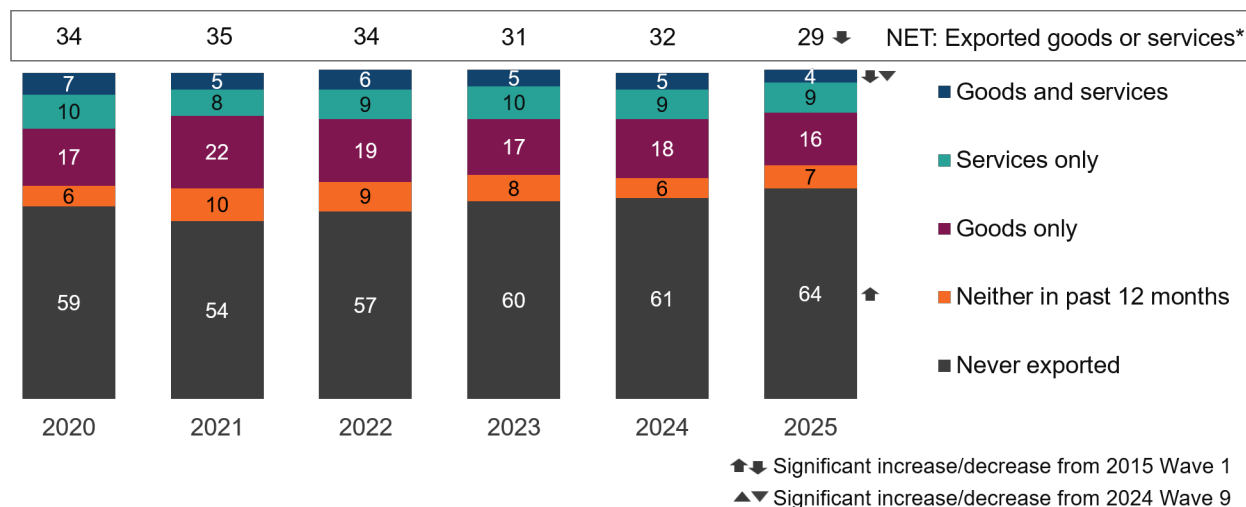
Base: All £500,000+ turnover respondents: 2025 W10: IS Sector (544); Non-IS Sector (1,578)

4.2 Exporting goods and services

In 2025, 24% of businesses stated that they previously exported goods outside of the UK and 17% stated that they had previously exported services. In the past 12 months, 20% had exported goods and 12% had exported services. The proportion of businesses which had exported goods, both ever and in the last 12 months, has been trending downwards since 2021 (34% ever, 27% in the past 12 months), while the proportion of businesses exporting services has remained more stable over the past few years.

In 2025, 16% of businesses reported exporting only goods in the past 12 months, while 9% had exported only services in the past 12 months. A minority (4%) reported that they had exported both goods and services in the past 12 months. This reflects the overall decline in exports over recent years reported in Section 4.1 (Figure 4.6).

Figure 4.6: Whether exported goods and/or services in past 12 months (% all respondents)



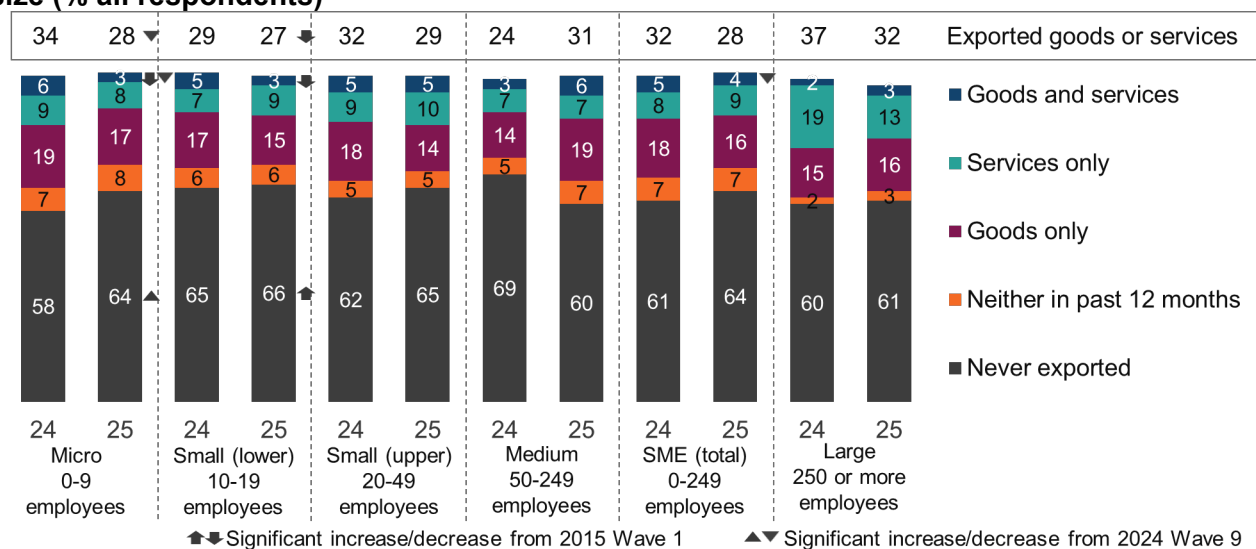
Source: Composite measure merging data from several variables (Q15A, Q15Ai, Q15B, Q15Bi, Q17A, Q17Ai, Q17B, Q17Bi).

Base: All respondents: 2020 W5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: All £500,000+ turnover (2,557 / 2,485 / 2,405 / 2,181 / 2,182 / 2,122) NB: 'Don't know' is not shown so values may not add to 100%. * NET exported goods or services includes those exporting either goods or services only, or both.

As in previous years, large businesses (with 250+ employees) were the most likely to have exported services (17%) in the past 12 months. Year on year, the proportion of micro businesses (with 0-9 employees) which had exported either goods or services fell from 34% in 2024 to 28% in 2025, with the proportion exporting both falling from 6% to 3% (Figure 4.7).

The longer-term picture is a decline in past 12 months exports of goods among the smallest (up to 19 employees) and largest (250+ employees) businesses since 2021. This trend is also apparent among small (upper band) (20-49 employees) and medium (50-249 employees) businesses, although changes over the same period are not significant. Past 12 months exports of services are more stable across all business sizes.

Figure 4.7: Whether exported goods and/or services in past 12 months - by business size (% all respondents)



Source: Composite measure merging data from several variables (Q15A, Q15Ai, Q15B, Q15Bi, Q17A, Q17Ai, Q17B, Q17Bi).

Base: All £500,000+ turnover respondents: 2024 W9 / 2025 W10: Micro (911 / 818); Small (lower band) (461 / 430); Small (upper band) (413 / 409); Medium (302 / 351); SME (2,087 / 2,008); Large (95* / 114) NB: 'Don't know' is not shown so this does not always add to 100%

* Base size is below 100; treat with caution

In 2025, businesses in Northern Ireland were most likely to have exported goods in the past 12 months (36%), followed by the Midlands (25%), North (22%) and South (20%). However, for Northern Ireland, this includes exports of goods to the Republic of Ireland, and only 10% of businesses in Northern Ireland had exported goods to countries excluding the ROI in the past 12 months. This is in line with London (12%) and Wales (13%), which had the lowest levels of exports of goods in the past 12 months across the regions and nations.

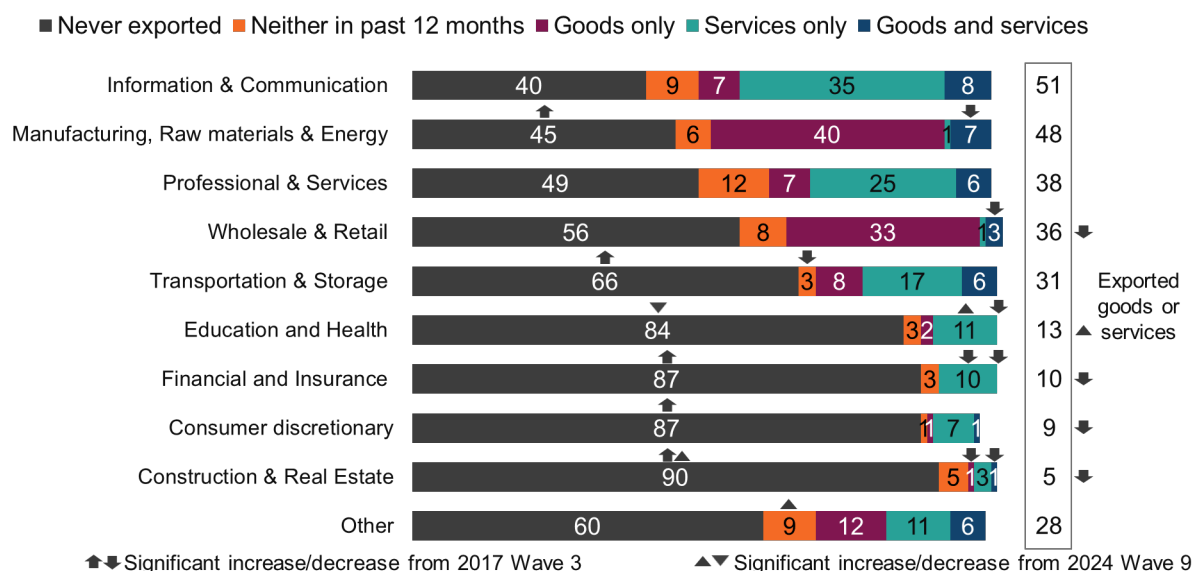
Businesses in Northern Ireland (22%) and London (20%) were most likely to have exported services in the past 12 months, although for Northern Ireland this includes those exporting services to the ROI and just 6% had exported services to countries excluding the ROI in the past 12 months. Aside from Northern Ireland excluding exports to the ROI, Wales (7%), the North (8%) and the Midlands (9%) had the lowest levels of exports of services in the past 12 months.

Figure 4.8 shows differences in exports by sector. Around half of businesses in the information and communication and manufacturing, raw materials and energy sectors had exported in the past 12 months (51% and 48% respectively). For information and communication businesses this was driven by exports of services (43% overall, and 35% had only exported services), whereas for manufacturing, raw materials and energy businesses this was driven by exports of goods (47% overall and 40% had only exported goods). Levels of last 12 months exports of goods were also relatively high among businesses in the wholesale and retail sector (35%), while professional and services businesses had relatively high levels of exports of services in the last 12 months (31%).

In the education and health sector, there was a year-on-year increase in the proportion of businesses which had exported services in the past 12 months, from 3% in 2024 to 11% in 2025. However, this represents a return to 2023 levels in a sector where there is often year on year fluctuation, perhaps indicative of the diversity of businesses which it includes.

Around 9 in 10 businesses in construction and real estate (90%), consumer discretionary (87%) and financial and insurance (87%) sectors stated that they had never exported. This was an increase from 83% in 2024 for construction and real estate businesses.

Figure 4.8: Whether exported goods and/or services in past 12 months - by sector (% all respondents)



Source: Composite measure merging data from several variables (Q15A, Q15Ai, Q15B, Q15Bi, Q17A, Q17Ai, Q17B, Q17Bi).

Base: All £500,000+ turnover respondents: 2025 W10: Construction & Real Estate (283); Consumer discretionary (135); Financial and Insurance (47*); Education and Health (143); Manufacturing, Raw Materials & Energy (380); Information & Communication (73*); Other (155); Wholesale & Retail (551); Professional & Services (282); Transportation & Storage (73*) NB: 'Don't know' is not shown so this does not always add to 100%

* Base size is below 100; treat with caution

Businesses in IS sectors were more likely than those in non-IS sectors to have exported services in the past 12 months (26% compared with 7%), but there was no difference between the two groups in last 12 months exports of goods (both 20%).

4.3 Export change in the last 12 months

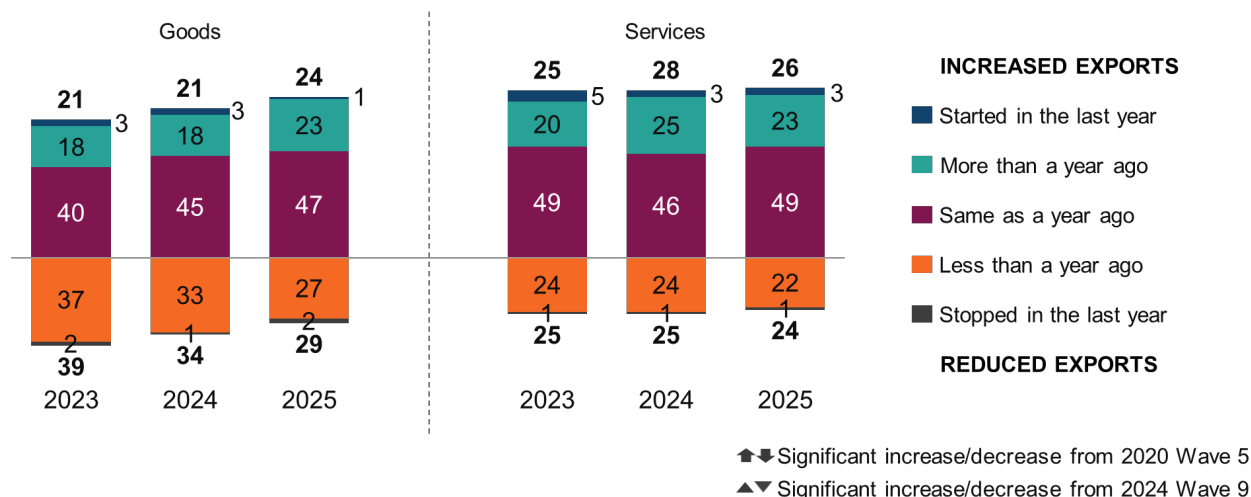
Figure 4.9 shows the proportion of exporting businesses reporting growth, stability or contraction in their exports of goods and services over the past year. These figures have some caveats attached. Businesses in Northern Ireland were asked separate questions about their change in exports to each of the Republic of Ireland and elsewhere. The figures we use here, which report on the data at an 'overall' level, exclude responses from businesses in Northern Ireland who exported only to the Republic of Ireland. This is to avoid double-counting of businesses who exported both to the Republic of Ireland and elsewhere (and were therefore asked both questions in the survey). We do not separately report on businesses in Northern Ireland which export to the Republic of Ireland due to the small sample size of this group.

Among current exporters of goods (those who said they had exported in the past 12 months), 24% stated that their exports of goods had increased in the past 12 months, while

29% stated that they had decreased. This equates to a net balance score²⁰ of -5%, which is an improvement from 2024 (-13%) and continues a trend of improvements over recent years, most notably driven by a decrease in the proportion of exporting businesses which reported a decline in their exports, from a high of 43% in 2022.

Among current exporters of services, 26% stated that their exports of services had increased in the past 12 months, with a further 24% stating that they had decreased. This equates to a net balance score of +2%, which is in line with recent years.

Figure 4.9: Changes in exports over past year (% of exporters of goods/services in past 12 months)



Source: Q16A/C/Q18A/C. Thinking about the last 12 months or so, which of the following best describes your export of [goods/services]?

Base: All £500,000+ businesses who have exported goods/services in past 12 months, excluding exports from NI to the ROI: 2023 W8 / 2024 W9 / 2025 W10: Goods (570 / 554 / 484) Services (303 / 274 / 246) NB: 'Don't know' is not shown so values may not add to 100%.

4.4 Active and passive exporting

In 2025, 75% of exporters said that they were essentially 'passive' in their exporting behaviours. Passive was defined as businesses which stated that they respond to orders from abroad when received, but do not specifically target customers in other countries. This was a significant increase from when the question was first asked in 2018 (66%), but in line with more recent years (Figure 4.10). Around 1 in 4 exporters (23%) reported that they intentionally targeted customers in specific countries and would therefore be classified as 'active' exporters.

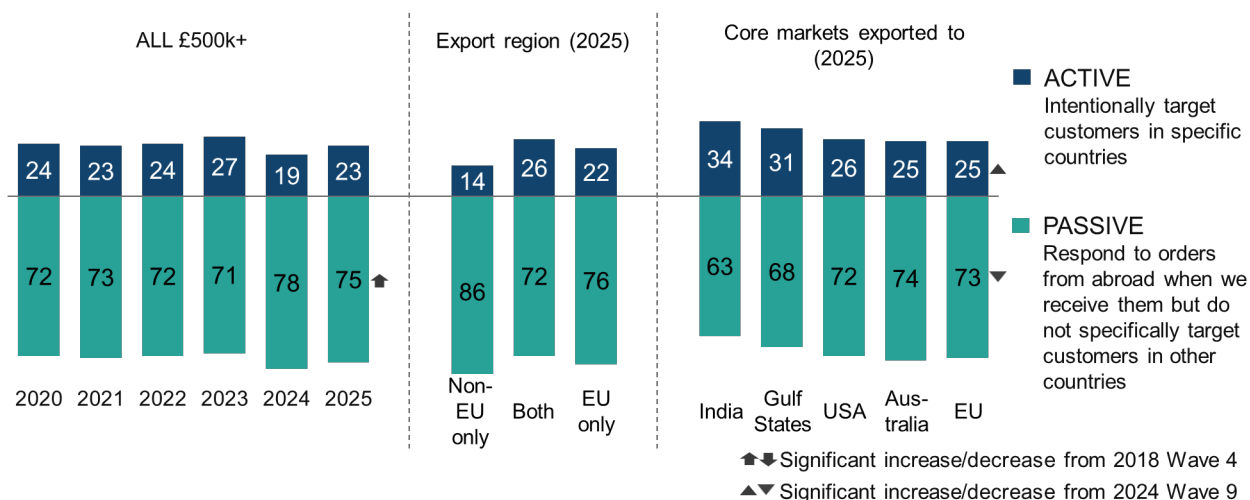
In 2025, businesses which exported only to non-EU countries were more likely than those which exported to both EU and non-EU countries to be 'passive' in their exporting behaviours (86% compared with 72%). There were also differences between exporters to different core markets,²¹ which in 2025 (as in 2023 and 2024) were defined as India, Australia, the Gulf States, the USA and the EU. Businesses which exported to India (34%) or

²⁰ The net balance score is calculated as the percentage of businesses that have increased their exports minus the percentage of businesses that have decreased their exports.

²¹ Core export markets are described further in Section 4.5.

the Gulf States (31%) were more likely than those exporting to other core markets to take an 'active' approach, with those exporting to Australia (74%), the EU (73%) or USA (72%) more likely to take a 'passive' approach'. Compared with 2024, there was an increase in the proportion of exporters to the EU which took an 'active' approach (up from 19% to 25%) and a corresponding decrease in the proportion which took a 'passive' approach (down from 79% to 73%). This represented a return to 2023 levels.

Figure 4.10: Passive or active approach to exporting (% of all who have ever exported)



Source: Q24A1. Thinking about countries that you have exported to, which of the following statements best describes the typical approach of your business to exporting?

Base: All £500,000+ businesses who have exported: 2020 W5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10 (1,173 / 1,269 / 1,170 / 957 / 887 / 836); Export region 2025 W10: Non-EU only / Both / EU only (55* / 499 / 203), Export market 2025 W10: India / Gulf States / USA / Australia / EU (148 / 234 / 375 / 237 / 702) * Base size is below 100; treat with caution

4.5 Export markets

In 2023 DBT identified the EU, USA, Gulf States,²² Australia and India and as priorities for inclusion in the NSRB, based on their strategic significance to UK trade and relevance to DBT policies.²³ These core markets remained the same for 2024 and 2025, although have previously typically changed each year. In 2025, 90% of those who had exported before had exported to one of these markets in the past 5 years, in line with 2024, but down from 94% in 2023 (Figure 4.11).²⁴ This was largely made up of those who had exported to the EU (86%), consistent with previous years.²⁵

Almost half (46%) of those who had ever exported reported exporting to the USA in the past 5 years, in line with previous years, and just under 3 in 10 reported exporting to the Gulf

²² In 2023 Gulf States included United Arab Emirates (UAE), Bahrain, Oman, Qatar and Saudi Arabia. In 2022 UAE was not included in the definition and was asked about separately.

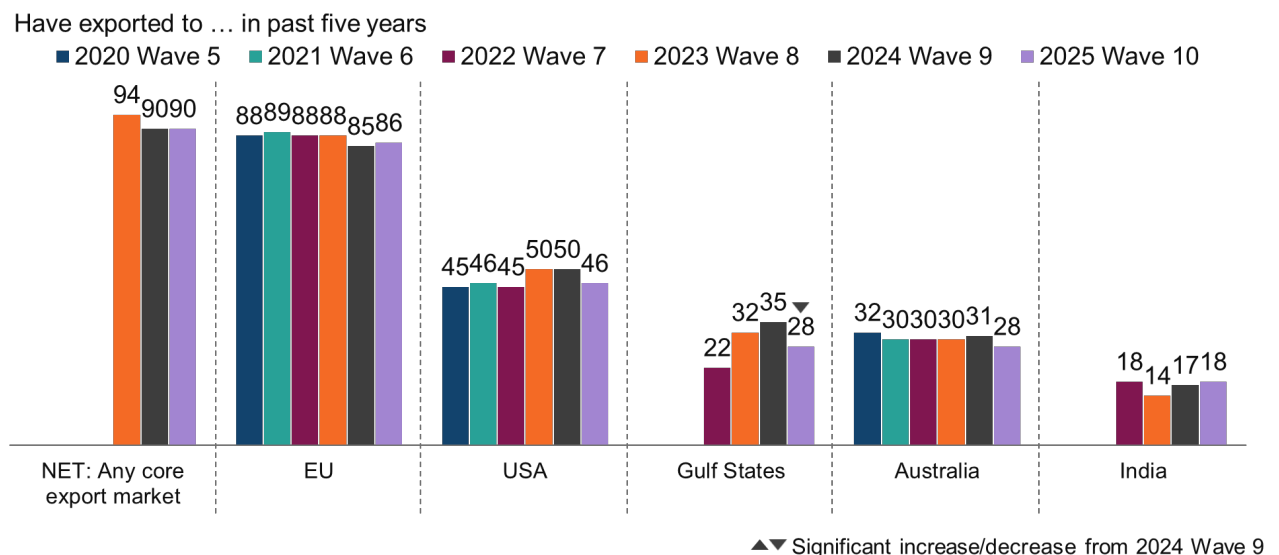
²³ The core market set also has an impact on the way respondents are routed through the questionnaire, and therefore also on the data available for analysis.

²⁴ Exports to any core market are not shown for years prior to 2023 due to the change in which markets were included.

²⁵ The EU has been included in the survey since 2020 but has only been defined as a core market since 2023.

States and Australia (both 28%). This was a decrease for the Gulf States²⁶ from 2024 (35%), following a period of steady increase from when they were first included in 2022 (22%). This figure of 22% should however be caveated due to a slight change in definition from 2022, when UAE was considered separately (30% exported to the UAE and 22% to the Gulf States in 2022). The proportion of current and lapsed exporters who stated that they had exported to India in the past 5 years remained stable at 18%.

Figure 4.11: Involvement in exporting to core markets (% of all who have ever exported)



Source: Q25A. Which, if any, of the following countries have you exported to over the past five years?

Base: All £500,000+ turnover businesses who have exported: 2020 W5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10 (1,173 / 1,269 / 1,170 / 957 / 887 / 836)

As in 2024, current and lapsed exporters in Northern Ireland were less likely than those in other parts of the UK to have exported to any core market (56%), and to each of the core markets individually (EU: 56%, USA: 15%, Gulf States: 3%, Australia: 5%, India: 1%), in the past 5 years. Almost all businesses in the East Midlands (99%), Scotland (96%) and South West (95%) which had ever exported had exported to a core market in the past 5 years.

4.6 Future plans for exporting

As shown in Figure 4.12, 18% of those who had not exported in the previous 12 months but had a suitable product or service were planning to start exporting at some point in the future. This was in line with previous years, and as in previous years, more businesses were planning to start exporting further than 12 months into the future (10%) than in the next 12 months (8%). However, these figures were closer than they have been in the past and this

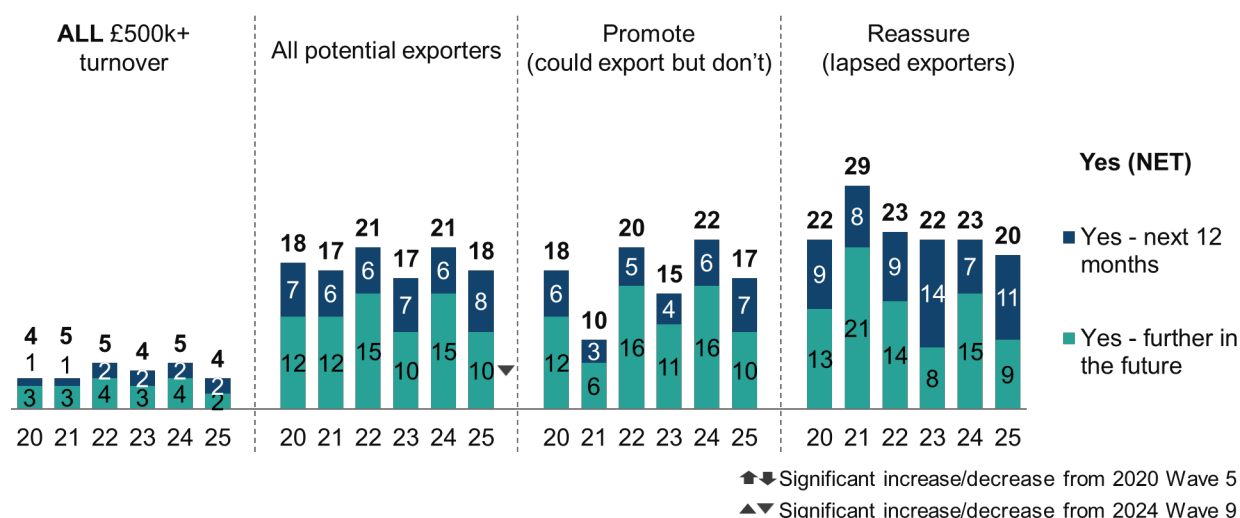
²⁶ While the proportion exporting to the Gulf States declined in 2025, during 2025 and 2026, the UK government continued negotiations towards a Free Trade Agreement with the Gulf Cooperation Council (GCC), which may influence future exporting activity in the region.

was a decline in the proportion of businesses which planned to start exporting more than 12 months in the future (from 15% in 2024, although in line with 2023).

As in previous years, there remains a substantial pool of businesses with self-reported potential for exporting, but who are not currently doing so (those businesses in the 'Promote' and 'Reassure' segments). The majority of these did not have plans to start exporting (82% and 78% respectively, in line with previous years).

The proportion of businesses planning to begin or recommence exporting at some point in the future (be it in the next 12 months or longer) is equivalent to 4% of the whole £500,000+ business sample.

Figure 4.12: Whether plan to start exporting (% all respondents)



Source: Q27. Do you have plans to start exporting or licensing your goods or services outside the UK? If yes: do you think this will be in the next 12 months or further in the future?

Base: All respondents 2020 W5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: £500k+ turnover (2,557 / 2,485 / 2,405 / 2,181 / 2,182 / 2,122), All potential exporters who have not exported in past 12 months but could (539 / 590 / 556 / 557 / 513 / 491), Promote (368 / 351 / 341 / 380 / 365 / 351), Reassure (148 / 217 / 196 / 152 / 130 / 129)

5. Barriers to exporting – (£500,000+ turnover businesses)

This chapter examines what capabilities and capacity businesses have for exporting and subsequently identifies what barriers to exporting they face when exporting to those regions designated as 'core markets'.

As set out in section 4.5, the focus for core export markets changes from year to year and in 2025 DBT identified the EU, USA, Gulf States, Australia and India and as priorities for inclusion in the NSRB. These core markets were the same as in 2023 and 2024. Businesses that had ever exported goods or services and had done so (or considered doing so) to at least one of these core markets, were asked an additional series of questions about barriers to exporting to these markets. Those exporting goods were specifically asked about product or production processes, customs procedures and business conditions abroad. Those exporting services were asked about barriers relating to the conditions for the supply of services, administrative costs and burdens, and treatment of domestic and foreign businesses. These questions are asked in alternate waves, so comparisons are made with 2023 (Wave 8), 2021 (Wave 6) and 2018 (Wave 4). However, due to changes in which markets are chosen as core markets from year to year, comparisons with previous waves are limited.

Key findings

- Businesses were most confident in having adequate supply chains (71%), the capabilities to assess demand for products or services (71%), assess the cost of exporting (70%), research and understand Free Trade Agreements (70%), or had the financial resources (69%) and staff skills (69%) to export.
- Perceptions of having the capability to research and understand Free Trade Agreements (up from 63% in 2023 to 70% in 2025), sufficient staff skills (up from 61% in 2023 to 69% in 2025), staff capacity (up from 52% in 2023 to 65% in 2025) and managerial time (up from 56% in 2023 to 64% in 2025) all improved over the last 2 years, but otherwise the overall picture was consistent.
- As in previous years, current and lapsed exporters were more likely to feel they had the capability and capacity for exporting than businesses which had the potential for export but had not yet done so.
- Around 6 in 10 (62%) of those who had exported goods before (to any market), and had exported or considered exporting to a core market, reported facing any barriers to their exports of goods. This was in line with 2023 but up from 45% in 2021. The most mentioned barrier to exporting goods was that relating to customs procedures (53%, up from 32% in 2021). These changes from 2021 are likely to be driven by the change in core markets and the inclusion of the EU as a core market from 2023. Reported barriers to exporting goods to the EU were higher than for other core markets (driven by barriers related to custom procedures), as they had been in 2023.
- Just over 4 in 10 (43%) of those who had exported services before (to any market), and had exported or considered exporting to a core market, reported facing any barriers to their exports of services. In contrast to the equivalent measure for barriers to goods exports, this was unchanged from when it was previously asked in 2018, 2021 and 2023, and does not appear to have been impacted by the inclusion of the EU as a key market

from 2023. Barriers faced were split fairly equally between those related to administrative costs, burdens and regulations abroad (28%), to the different treatment of domestic and foreign businesses (23%), and to the conditions for the supply of services abroad (22%). Unlike for exports of goods, there was no one barrier which stood out as being more likely to be faced by those exporting services to the EU than those exporting services to other core markets.

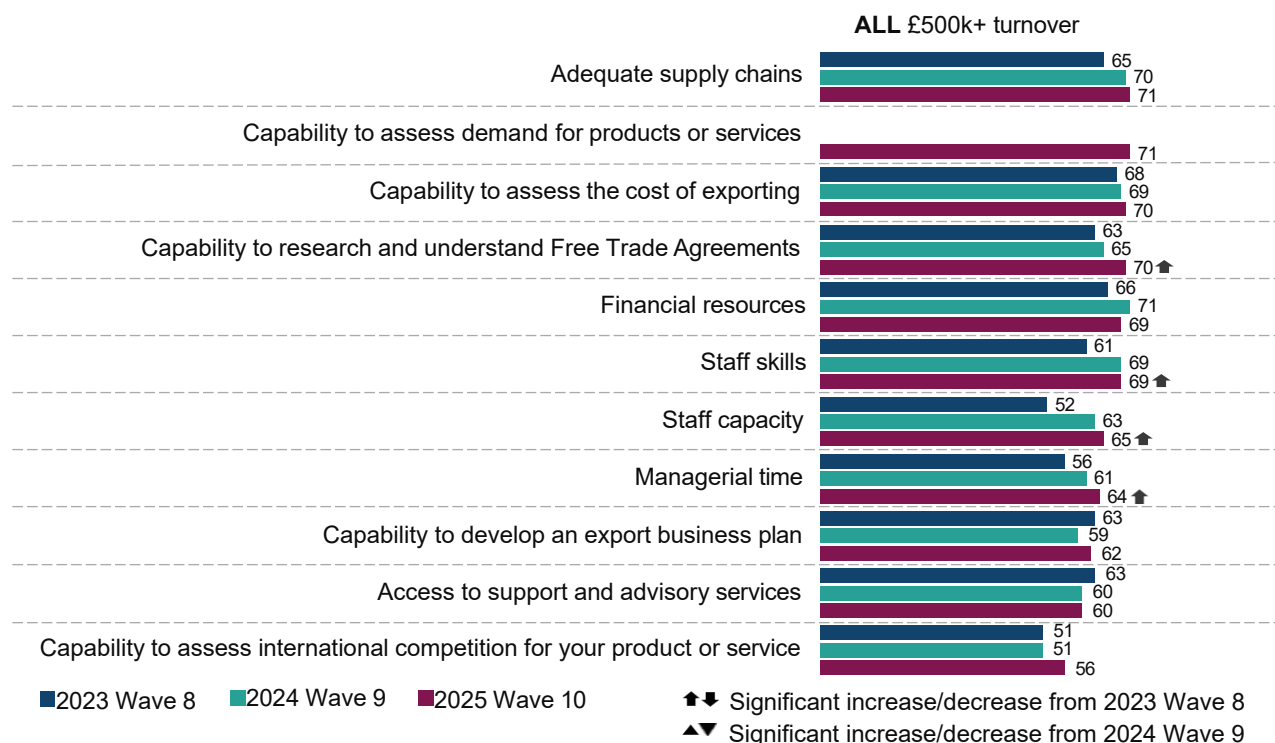
5.1 Capabilities to focus on exporting

Businesses whose goods or services were suitable for export were questioned about the capabilities and capacity they possessed for exporting. This covered businesses in the 'Sustain' and 'Reassure' segments, which were current or previous exporters and made up 35% of all £500,000+ businesses, and businesses in the 'Promote'²⁷ segment, who had never exported but whose goods or services could be developed for export, accounting for a further 18% of businesses.

Around 7 in 10 of these businesses felt they had adequate supply chains (71%), the capabilities to assess demand for products or services (71%), assess the cost of exporting (70%), research and understand Free Trade Agreements (70%), or had the financial resources (69%) and staff skills (69%) to export. Having the capability to research and understand Free Trade Agreements (up from 63% in 2023 to 70% in 2025) and sufficient staff skills (up from 61% in 2023 to 69% in 2025) had both improved over the last 2 years (Figure 5.1). There were also improvements over this period in having enough staff capacity (up from 52% in 2023 to 65% in 2025) and managerial time (up from 56% in 2023 to 64% in 2025).

²⁷ See section 3.5 'Segment Definitions' for a full explanation.

Figure 5.1: Whether businesses have enough capability and capacity to focus on exporting (% 'yes' of all whose product is suitable for export)

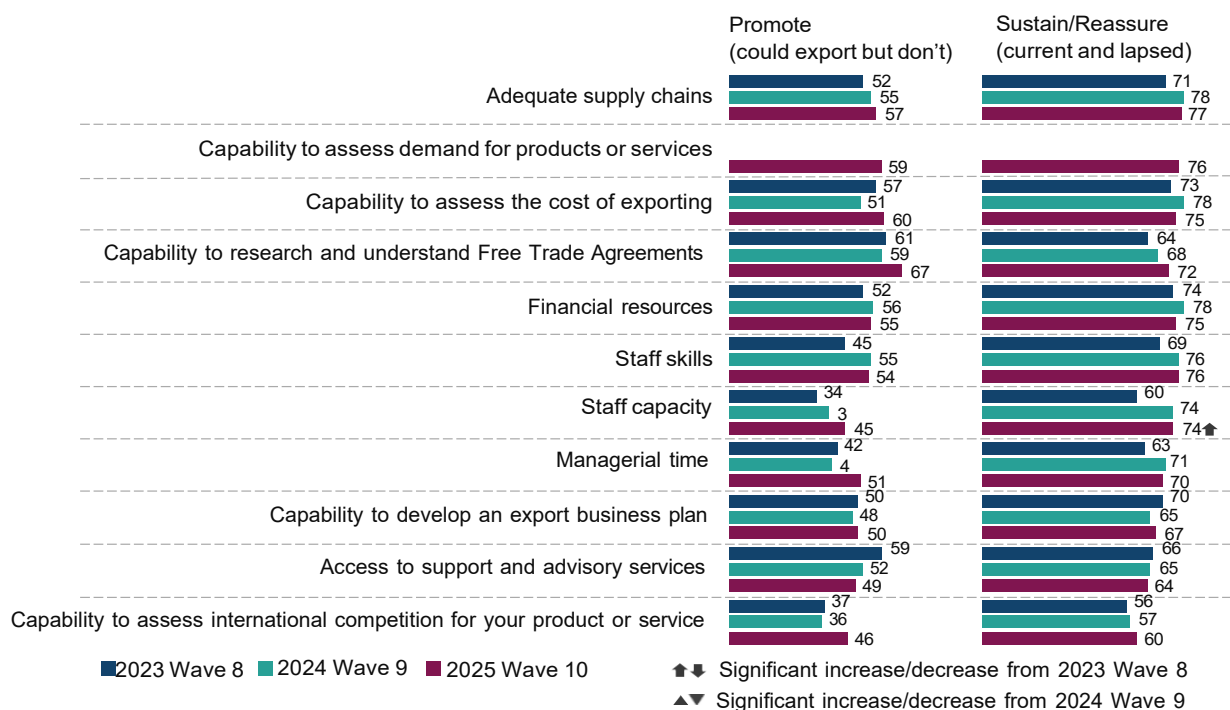


Source: Q31a Thinking about your business' ability to start or continue exporting, does your business have enough of each of the following?

Base: All businesses whose product is suitable for export, half selected at random 2023 W8 / 2024 W9 / 2025 W10: £500k+ turnover businesses (656 / 635 / 594)

As seen in previous years, current and lapsed exporters (in the 'Sustain' and 'Reassure' segments) were more confident than those in the 'Promote' segment about their capabilities and capacity for export across most areas (Figure 5.2). As was the case in both 2023 and 2024, the exception was in having the capability to research and understand Free Trade Agreements, where there was no difference between segments.

Figure 5.2: Whether businesses have enough capability and capacity to focus on exporting (% 'yes' of all whose product is suitable for export)



Source: Q31a Thinking about your business' ability to start or continue exporting, does your business have enough of each of the following?

Base: All businesses whose product is suitable for export, half selected at random 2023 W8 / 2024 W9 / 2025 W10: Promote (186 / 197 / 164), Sustain/Reassure (458 / 426 / 425)

Across the majority of measures, medium sized businesses with 50 to 249 employees were most likely to feel that they had the capability and capacity to focus on exporting, and in many cases it was large businesses which were least likely to feel this was the case. For example:

- Adequate supply chains (medium 81%, large 55%)
- Capability to assess demand for products or services (medium 84%, large 59%)
- Capability to assess the cost of exporting (medium 79%, large 51%)
- Capability to develop an export business plan (medium 78%, large 56%)
- Access to support & advisory services (medium 75%, large 51%)

5.2 Barriers to exporting goods and services (introduction)

Businesses that had exported before were asked if they had exported or considered exporting to various markets in the past 5 years²⁸ (see section 4.5). If they had exported goods and had exported to one of the core markets (EU, USA, Gulf States, Australia or India

²⁸ Refer to survey questionnaire included within accompanying technical report for full list of markets asked about.

in 2025²⁹), they were asked if they had faced any barriers to exporting goods to the market in question, with follow up questions on the specific nature of these barriers. If they had exported or considered exporting goods to more than one market, then one market at random was selected for response. A similar series of follow-up questions were asked to exporters of services, using equivalent routing.

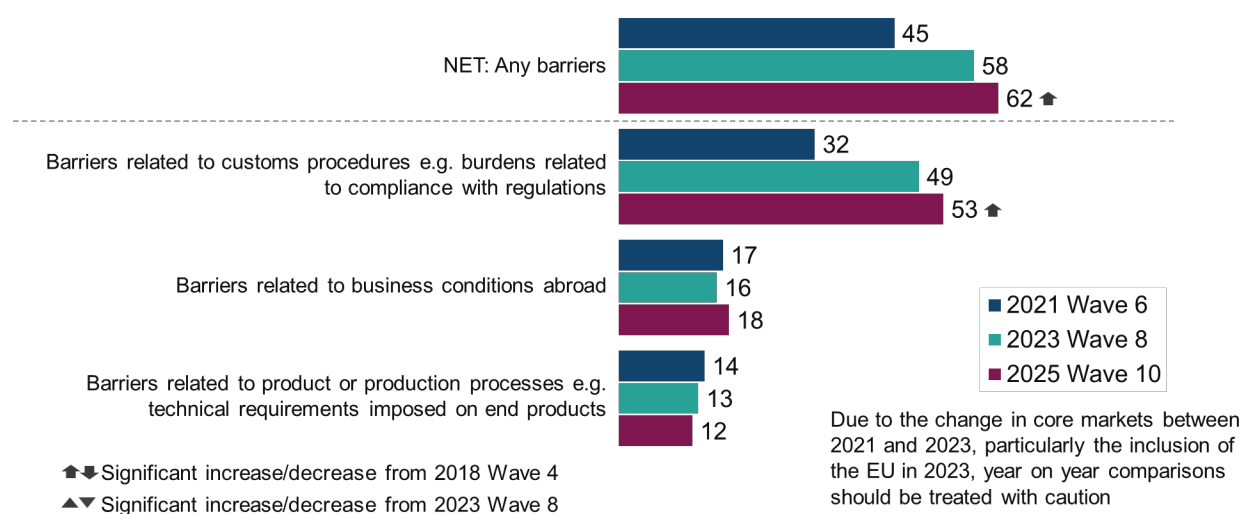
Due to the change in core markets between 2021 and 2023, any comparisons with 2021 (or 2018) should be treated with caution, particularly since 2023 and 2025 included the EU, the most common export destination, which can therefore dominate the findings.

5.3 Barriers to exporting goods

Around 6 in 10 (62%) of those who had exported goods before, and had exported or considered exporting to a core market, reported facing any of the listed barriers to their exports of goods. This was in line with 2023 (58%), but up from 45% in 2021 (Figure 5.3) and also higher than when the question was first asked in 2018 (51%).

In 2025, barriers related to customs procedures were again the most frequently cited issue, mentioned by half (53%), up from 32% in 2021, and likely driven by the additional inclusion of the EU as a core market in 2023 (when customs procedures were mentioned by 49%) and 2025. This is described in more detail later in this section. Fewer than 1 in 5 mentioned barriers related to business conditions abroad (18%) or barriers related to product or production processes (12%), with both of these in line with previous years.

Figure 5.3: Barriers to exporting goods (% of all respondents who export goods and had exported/considered exporting to one of the core markets)



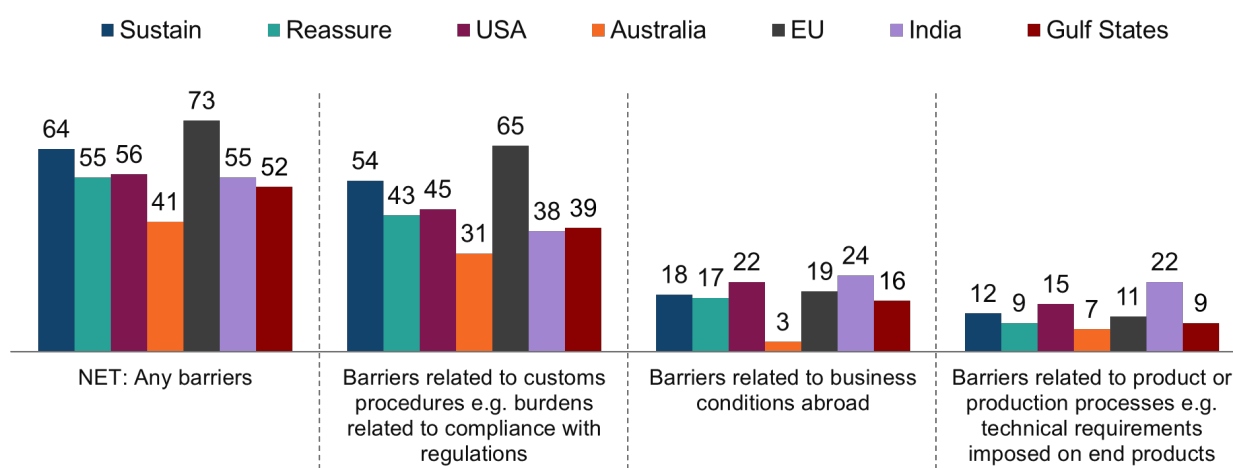
Source: Q25C1. Which, if any, of the following were the main barriers that cost (or would have ended up costing) your organisation time, money or other resources when you considered exporting/exported GOODS to [MARKET] in the past 5 years?

Base: 2021 W6 / 2023 W8 / 2025 W10: All who export goods and had exported/considered exporting to one of the core markets (asked about one at random if more than one): £500,000+ turnover businesses (610 / 701 / 552)

²⁹ These were the same core markets as in 2023. In 2018 and 2021, the core markets were USA, Australia, China and New Zealand.

In 2025, there were no significant differences in the proportion of businesses reporting facing barriers to exporting goods either by business size or segment. However, as was also the case in 2023, businesses which exported goods to the EU were more likely than those who exported goods to other core markets to report facing barriers related to customs procedures (65%). As shown in Figure 5.4, this was the driver of overall higher levels of reported barriers to exporting goods by those who exported to the EU (73%). Those who exported goods to Australia were least likely to report any barriers to doing so (41%). Given this pattern of responses, which was also observed in 2023 when the EU was first included as a core market, it is clear that the shifts in the overall proportion of those facing barriers to exporting goods, and in particular in experiencing barriers related to customs procedures, are driven by the inclusion of the EU as a core market since 2023.

Figure 5.4: Barriers to exporting goods – by segment and market (% of all respondents who export goods and had exported/considered exporting to one of the core markets)



Source: Q25C1. Which, if any, of the following were the main barriers that cost (or would have ended up costing) your organisation time, money or other resources when you considered exporting/exported GOODS to [MARKET] in the past 5 years?

Base: 2025 W10: All £500,000+ businesses which export goods and had exported/considered exporting to one of the core markets (asked about one at random if more than one): Sustain / Reassure (496 / 56*), Exported or considered exporting to, and asked about, USA / Australia / EU / India / Gulf States (118 / 47* / 290 / 32* / 65*) * Base size is below 100; treat with caution

For each goods export barrier, businesses facing that barrier were asked about specific issues relating to it. Given low base sizes, it is not possible to analyse specific barriers by core market or any other subgroup.

5.3.1 Customs procedures

Just over 6 in 10 (63%) of those who mentioned barriers related to customs procedures cited document requirements as a key barrier, in line with 2023 (68%), but a greater proportion than in earlier years. This is most likely driven by the inclusion of the EU from 2023 onwards, although sample sizes are too small to draw any firm conclusions. Around 1 in 4 (24%) mentioned the cost of time taken to complete procedures, up from 15% in 2023. Slightly fewer cited payments/fees for documents and inspections (17%), delays at the border (17%)

and a lack of information and guidance on procedures (16%), all of which were in line with 2023. Tariff related issues, which were added as a response option to the 2025 survey at the start of quarter 2, were mentioned by 14%³⁰ of those who experienced barriers related to customs procedures.

5.3.2 Business conditions

Among those who had experienced business conditions abroad as a barrier to exporting, 18% cited country specific delivery challenges, up from 3% in 2023, while 12% mentioned changes to internal trade policy in the partner country³¹ and 11% mentioned increased shipping costs.

5.3.3 Product or production processes

Of those who cited barriers related to product or production processes, 32% mentioned requirements to meet product standards and 24% mentioned requirements on safety or quality regulations. Slightly fewer mentioned restrictions on accessing raw materials (13%), high customs duties due to there being no FTA agreement in place (10%) and tariffs imposed on raw materials or parts (10%³²). The only significant change from 2023 was in mentions of cost implications, which fell from 21% in 2023 to 3% in 2025³³.

5.4 Barriers to exporting services

In 2025, just over 4 in 10 (43%) businesses which had ever exported services, and had exported or considered exporting to a core market, reported facing any of the listed barriers to their exports of services. Unlike for the export of goods, this was unchanged from when it was previously asked in 2018, 2021 and 2023, and in particular does not appear to have been impacted by the inclusion of the EU as a core market from 2023.

Around 1 in 4 mentioned barriers related to administrative costs, burdens and regulations abroad (28%), to the different treatment of domestic and foreign businesses (23%) and to the conditions for the supply of services abroad (22%). Mentions of barriers related to the different treatment of domestic and foreign businesses have been steadily increasing over the years, from 12% when the question was first asked in 2018.

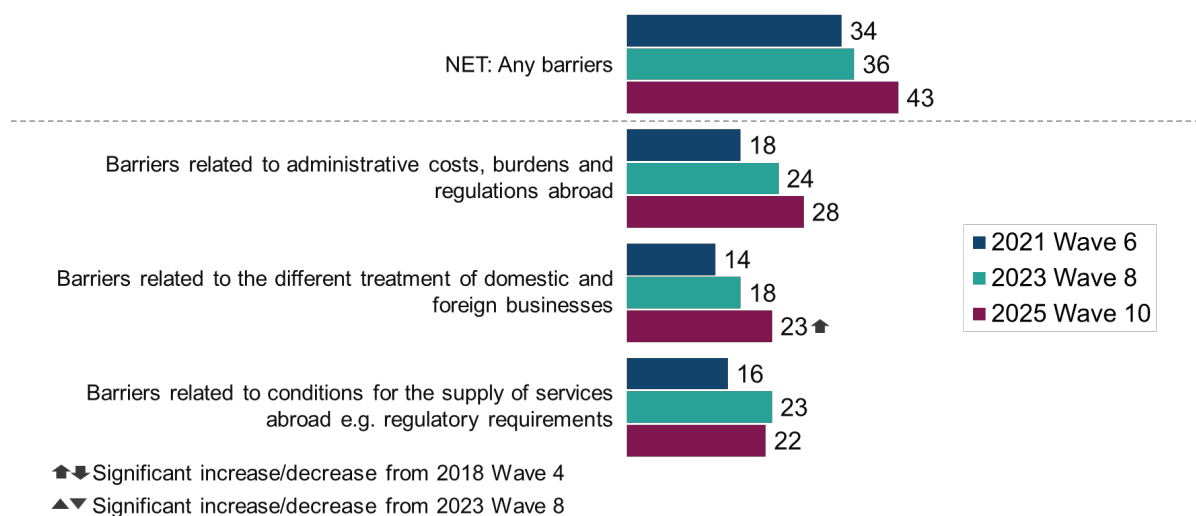
³⁰ The percentage quoted for tariff related issues is based on respondents interviewed from 2025 quarter 2 onwards.

³¹ Changes to internal trade policy in the partner country was a new response option added at the start of quarter 2 of the 2025 survey and the percentage quoted is based on respondents interviewed from 2025 quarter 2 onwards.

³² Tariffs imposed on raw materials or parts was a new response option added at the start of quarter 2 of the 2025 survey and the percentage quoted is based on respondents interviewed from 2025 quarter 2 onwards.

³³ This finding should be interpreted with caution given the relatively small base size. Changes since 2023 may reflect a range of factors, including wider changes in business and supply chain conditions, as well as differences in how respondents categorised cost-related barriers.

Figure 5.5: Barriers to exporting services (% of all respondents who export services and had exported/ considered exporting to one of the core markets)



Source: Q25C5. Which, if any, of the following were the main barriers that cost (or would have ended up costing) your organisation time, money or other resources when you considered exporting/exported SERVICES to [MARKET] in the past 5 years?

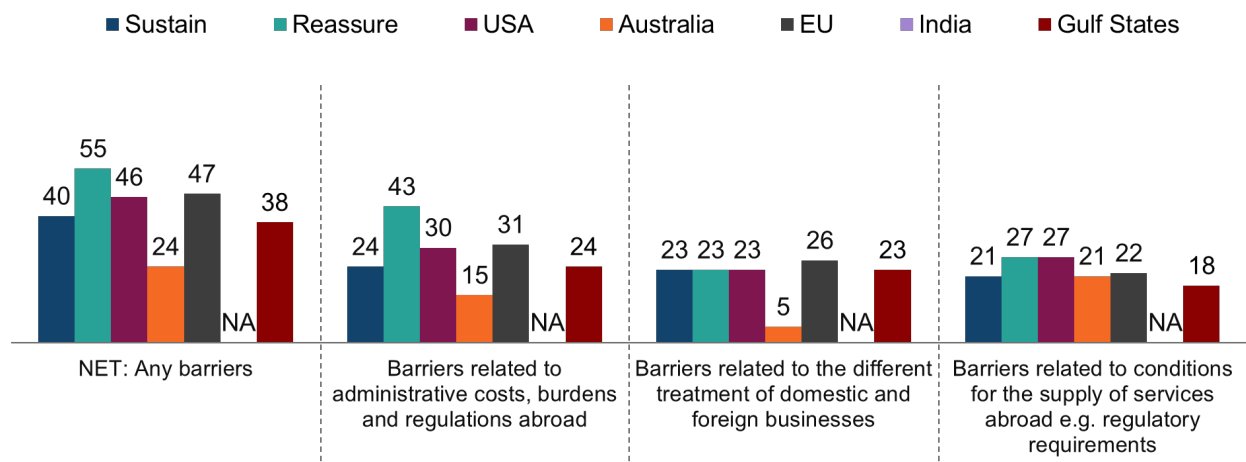
Base: 2021 W6 / 2023 W8 / 2025 W10: All who export services and had exported/considered exporting to one of the core markets (asked about one at random if more than one): £500,000+ turnover businesses (300 / 369 / 300)

In 2025, there were no significant differences³⁴ between the current exporter ('Sustain') and lapsed exporter ('Reassure') segments in overall mentions of barriers to exporting services, but lapsed exporters were significantly more likely than current exporters to cite barriers related to administrative costs, burdens and regulations abroad (43% compared with 24%, as shown in Figure 5.6). This has been steadily increasing for lapsed exporters (up from 11% in 2021) but has remained unchanged for current exporters.

Those describing their exports of services to the USA and the EU were more likely to report facing barriers (46% and 47% respectively) than those describing their exports of services to Australia (24%) or the Gulf States (38%). However, unlike with exports of goods, there was no one barrier which stood out as being more likely to be faced by those exporting services to the USA or EU than those exporting services to other core markets (Figure 5.6).

³⁴ Although there is a difference of 15 percentage points, a larger difference is required for it to be significant due to the relatively small number of 'Reassure' businesses which exported or considered services to a core market and were therefore asked this question.

Figure 5.6: Barriers to exporting services – by segment and market (% of all respondents who export services and had exported/considered exporting to one of the core markets)



Source: Q25C5. Which, if any, of the following were the main barriers that cost (or would have ended up costing) your organisation time, money or other resources when you considered exporting/exported SERVICES to [MARKET] in the past 5 years?

Base: 2025 W10: All £500,000+ businesses which export services and had exported/considered exporting to one of the core markets (asked about one at random if more than one): Sustain/Reassure (258 / 42*), Exported or considered exporting to, and asked about, USA / Australia / EU / India / Gulf States (60* / 29* / 152 / 16** / 43*) * Base size is below 100; treat with caution ** Base size too low to show data

For each services export barrier, businesses facing that barrier were asked about specific issues relating to it. Given low base sizes, it is not possible to analyse specific barriers by core market or any other subgroup.

5.4.1 Administrative costs, burdens and regulations

Around 1 in 4 of those who cited barriers related to administrative costs, burdens and regulations abroad as a barrier mentioned customs costs, procedures or import restrictions (25%) and restrictive and costly start-up procedures (23%) as specific challenges, with the latter steadily increasing and from 6% in 2021. Around 1 in 10 mentioned cost implications (14%), a lack of transparency in how local laws are enforced (9%) and visa costs or difficulties in obtaining visas (9%).

5.4.2 Conditions for the supply of services abroad

Among those who mentioned they had experienced barriers related to conditions for the supply of services abroad, just under 1 in 4 had experienced issues with documents or paperwork (23%) and barriers related to licenses and permits (22%). For the latter this was a decrease from 43% in 2023. Around 1 in 6 (15%) cited requirements on the nationality of businesses owners/employees as a barrier, in line with 2023.

5.4.3 Different treatment of domestic and foreign businesses

In 2025, 30% of businesses which said they had experienced barriers related to the different treatment of domestic and foreign businesses mentioned practices or rules giving preference to domestic suppliers, up from 9% in 2023. Around 1 in 10 mentioned rules, state subsidies or taxes (other than tariffs) which favour domestic over foreign firms (14%), requirements to use local assets, use local components or train local workers (12%), legal minimum or maximum prices for specific services (10%) and taxation issues (10%). These were all broadly in line with 2023.

6. Free Trade Agreements (FTAs) – (£500,000+ turnover businesses)

There were several major Free Trade Agreement–related announcements and events during 2025 in the period of NSRB fieldwork. The Labour government continued to set out its position on the UK’s approach to Free Trade Agreements, including activity relating to agreements previously announced or under negotiation with partners such as India, the Gulf Cooperation Council, Israel, the Republic of Korea, Switzerland and Turkey. The UK’s accession to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), agreed in 2024, formed part of the wider trade policy context during 2025.

Other FTA-related activity throughout the year included ongoing discussions with a range of trading partners, as well as continued use of Memorandums of Understanding (MoUs) aimed at supporting trade and investment with the United States. Negotiations and engagement with major economies, including India and the Gulf Cooperation Council, also took place at various points during the year and continued to attract media and political attention.³⁵

For several years, the NSRB has asked businesses to predict the effects of negotiated FTAs on their business. New questions introduced in 2023 asked businesses to describe their knowledge of FTAs, anticipated effects of the agreements, as well as their experiences of FTA benefits. This chapter explores these subjects in turn. It is important to note that these questions were asked at an overall level rather than focussing on specific negotiations or agreements.

The findings in this chapter are reported on businesses who have ever exported or whose products could be developed for export. Overall, the findings from this chapter indicate that most have heard of FTAs (81%) and almost a quarter (23%) know something about them. There was agreement from 56% of those surveyed that FTAs will benefit their business, but fewer agree they are confident they would know how to trade through an FTA (35%) or that the government is providing information and support to help businesses access FTA benefits (24%). This suggests a need for DBT to provide further information and support in these areas to help businesses capitalise on benefits.

All businesses who have ever exported or whose products could be developed for export were asked where they would go for information and support relating to FTAs, with the most mentioned source being GOV.UK (73%). This was followed by the UK government (54%) and business or professional contacts (53%).

Key findings

- Among businesses who have ever exported or whose product could be developed for export, 81% had heard of FTAs. Almost a quarter (23%) knew a ‘great deal’ or ‘fair amount’ about them, consistent with 2024.
- Over half of exporters and potential exporters (56%) agreed that FTAs will benefit their business. Fewer agreed that they would know how to trade through an FTA (35%) or that

³⁵ For further information on trade agreements signed and being negotiated by the UK, visit the GOV.UK webpage: <https://www.gov.uk/government/collections/the-uks-trade-agreements>

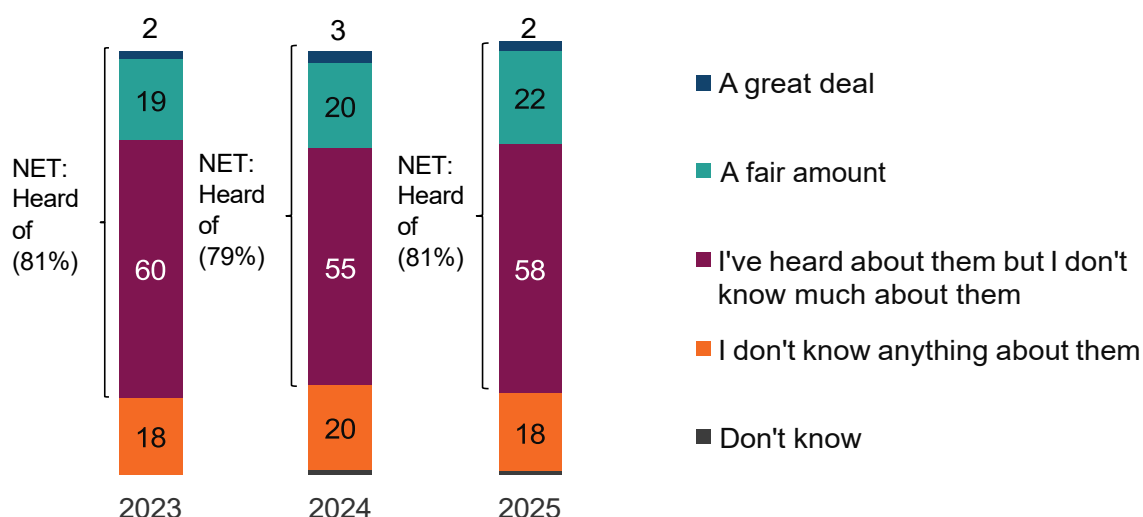
the government is providing information and support to help businesses access FTA benefits (24%).

- GOV.UK remained the most cited source of information and support relating to FTAs (73%) among businesses, though mentions of the UK government, including DBT, decreased in 2025 (54%, down from 62% in 2024).
- Over half of exporters said their exports are eligible for any FTA benefits (52%).
- Reduced customs duties was the FTA benefit businesses most frequently cited being eligible for, among both exporters (28%) and importers (29%).

6.1 Knowledge of FTAs

In 2025, all businesses who have ever exported or whose products could be developed for export were asked about their level of knowledge of FTAs. Overall, 81% businesses had heard of FTAs, with 58% not knowing much about them, 22% knowing 'a fair amount', and just 2% knowing 'a great deal' (Figure 6.1), consistent with 2024.

Figure 6.1: Level of knowledge about FTAs (% of all respondents who have ever exported or whose products could be developed for export)



Source: FTA1. How much do you know about the UK's Free Trade Agreements?

Base: All £500k+ turnover businesses who have ever exported or whose products could be developed for export: 2023 W8 / 2024 W9 / 2025 W10 (1,337 / 1,252 / 1,187).

Looking further at individual segments, businesses in the 'Sustain' (28%) and 'Reassure' (24%) segments were more likely to say they know 'a great deal' or 'a fair amount' about FTAs, compared with those in the 'Promote' (15%) segment.

There were no significant differences in awareness or knowledge about FTAs by region or business size (number of employees). However, businesses with a turnover of £10,000,000 to £49,000,000 were most likely to report they had **heard** of FTAs (91%), while those with a turnover of £5,000,000 to £9,999,999 were most likely to report having **any knowledge** about them (39%), compared with businesses with a turnover of £500,000-£1,999,999 who were less likely to report they had heard of FTAs (80%), or have any knowledge about them (21%).

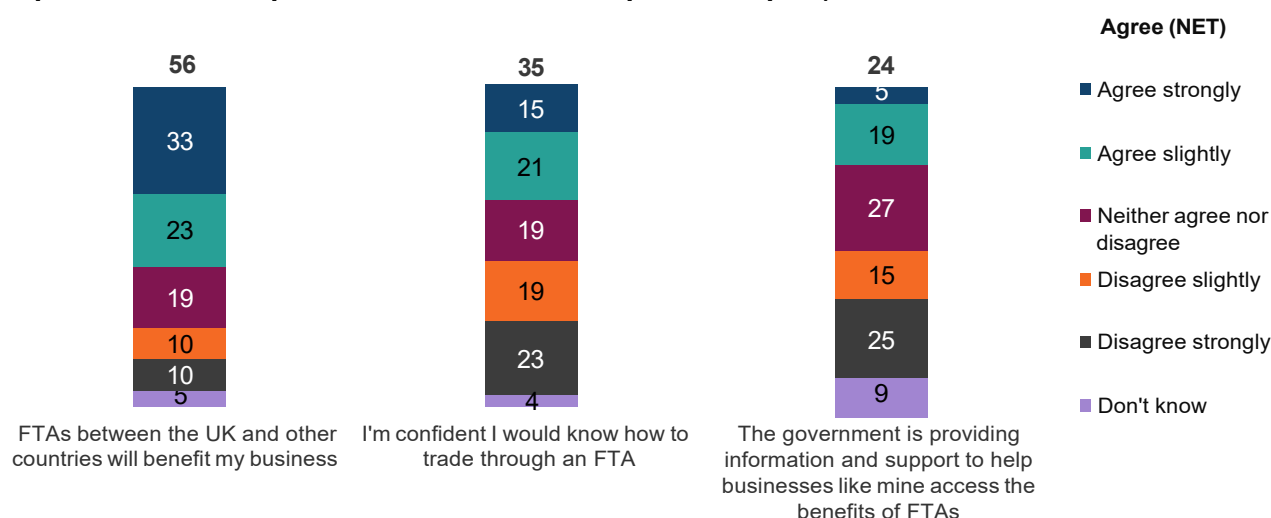
Among exporters or potential exporters (Sustain, Reassure, Promote) who have ever **imported**, 82% had heard of FTAs, with 55% not knowing much about them, 24% knowing 'a fair amount' and 2% knowing 'a great deal'. Knowledge was lower among non-importers, while 80% had heard of them (likely due to these businesses being exporters or potential exporters), only 18% reported any knowledge about them, compared to 26% of those who had ever imported.

6.2 Expected effects of FTAs

Exporters and potential exporters were then asked their level of agreement with a series of statements relating to FTAs.

As shown in Figure 6.2, 56% of businesses agreed that FTAs will benefit their business. Over a third agreed they were confident that they would know how to trade through an FTA (35%), while almost a quarter (24%) agreed that the government is providing information and support to help businesses like theirs access the benefits of FTAs. Agreement with these statements in 2025 remained consistent with 2024 levels. This suggests a continued need for DBT to provide further information and support to businesses on trading through an FTA and accessing benefits.

Figure 6.2: Agreement with FTA statements (% of all respondents who have ever exported or whose products could be developed for export)



Source: FTA5. To what extent do you agree or disagree with the following statements relating to Free Trade Agreements?

Base: All £500,000+ turnover businesses who have ever exported or whose products could be developed for export: 2025 W10 (1,187)

Businesses who had ever exported ('Sustain' and 'Reassure') were more likely to agree that FTAs would benefit their business (61%) than potential exporters ('Promote' 46%). Businesses in England were more likely to agree FTAs will benefit their business (57%), compared to those in Wales (46%) or Scotland (40%). Businesses with a turnover between £2,000,000 and £4,999,999 were also more likely to agree that FTAs would benefit their business (62%) compared with those with a turnover between £5,000,000 and £9,999,999 (45%).

Similarly, businesses who had ever exported ('Sustain' and 'Reassure') were more likely to agree that they felt confident in knowing how to trade through an FTA (41%) than potential exporters ('Promote', 24%).

Businesses in Northern Ireland were more likely to agree (35%) that the government is providing enough information and support, compared to Great Britain as a whole (23%), and most individual regions.

SMEs were more likely to disagree that the government is providing information and support to help business like theirs access the benefits of FTAs (41%) compared to large businesses (16%). This suggests DBT should continue to further target the SME group in their communications surrounding FTAs.

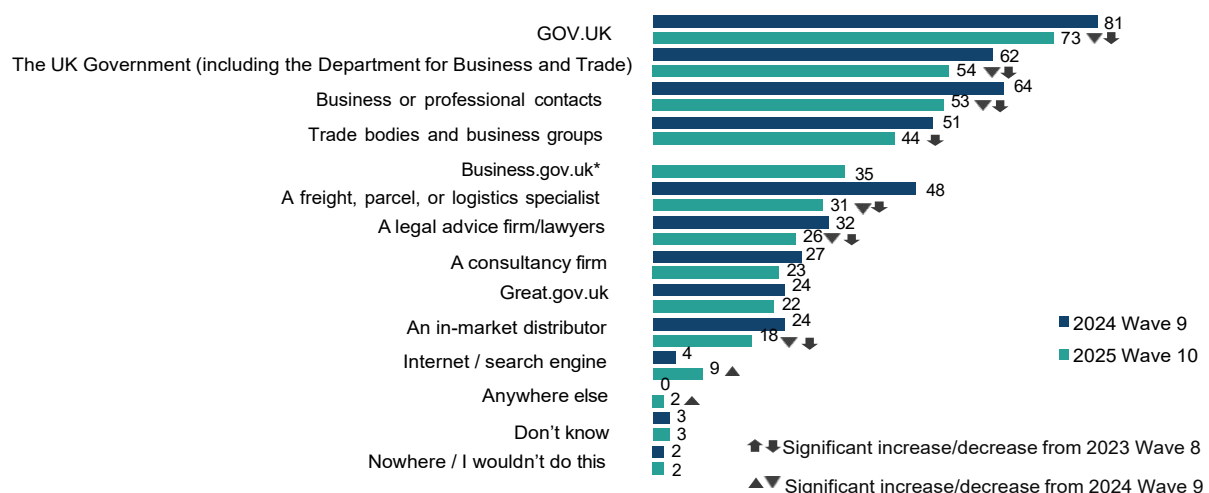
Exporters and potential exporters who had ever **imported** were more likely to agree that FTAs will benefit their business (64% compared with 41% of non-importers), and that they felt confident that they would know how to trade through an FTA (41% compared with 24% of non-importers). Importers were slightly, but not significantly, more likely to agree that the government is providing information and support to help businesses like theirs access the benefits of FTAs (25% compared with 21% of non-importers).

6.3 Information and support relating to FTAs

Businesses who have ever exported or whose products could be developed for export were subsequently asked where they would go to find information and support relating to FTAs. Figure 6.3 shows that most businesses (73%) would visit GOV.UK, a decrease from 81% in 2024. Just over half (54%) mentioned the UK government (a decrease from 62% in 2024), or business and professional contacts (53%), also a decrease from 2024 (64%).

Among businesses who have never imported, 63% would go to the UK government to find out information about FTAs, compared with 49% of those who have ever imported who were more likely to mention freight, parcel or logistics specialists (38% compared to 17% of non-importers).

Figure 6.3: Sources of information and support relating to FTAs (% of all respondents who have ever exported or whose products could be developed for export)



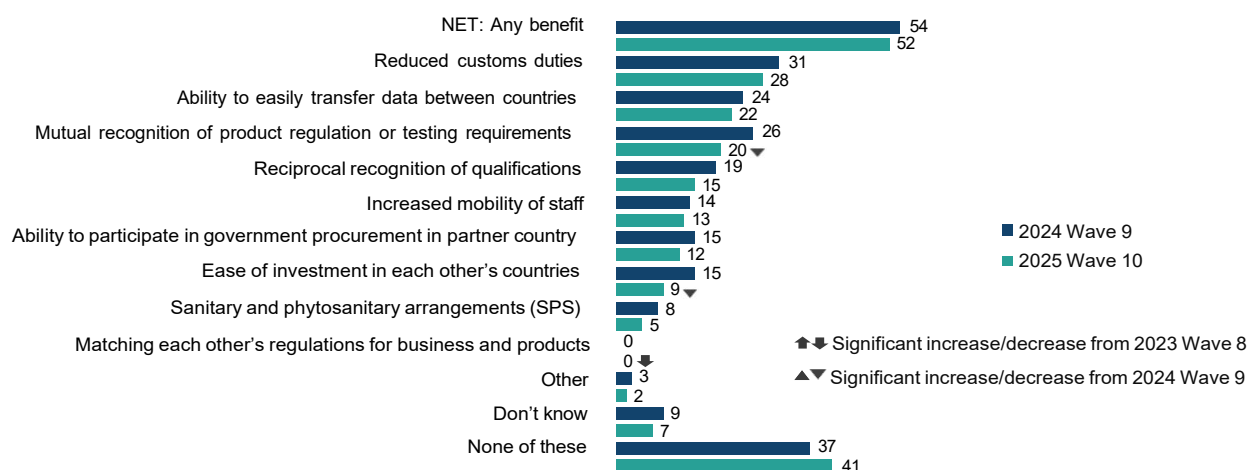
Source: FTA6. Where would you go to find information and support relating to Free Trade Agreements?

Base: All £500,000+ turnover businesses who have ever exported or whose products could be developed for export (random half sample): 2024 W9 / 2025 W10 (613 / 606) * New code added at W10Q2.

6.4 Experience of FTA benefits

Businesses who had exported before were asked about which benefits their goods or services were eligible for. Just over half (52%) said they were eligible for any benefit, with 28% citing eligibility for reduced customs duties and 22% citing the ability to easily transfer data between countries. One in 5 (20%) mentioned the mutual recognition of product regulation, a decrease from 26% in 2024 (Figure 6.4). Fewer businesses mentioned ease of investment in each other's countries in 2025 (9%), compared with 15% in 2024.

Figure 6.4: Eligibility for FTA benefits (% of respondents who have ever exported)



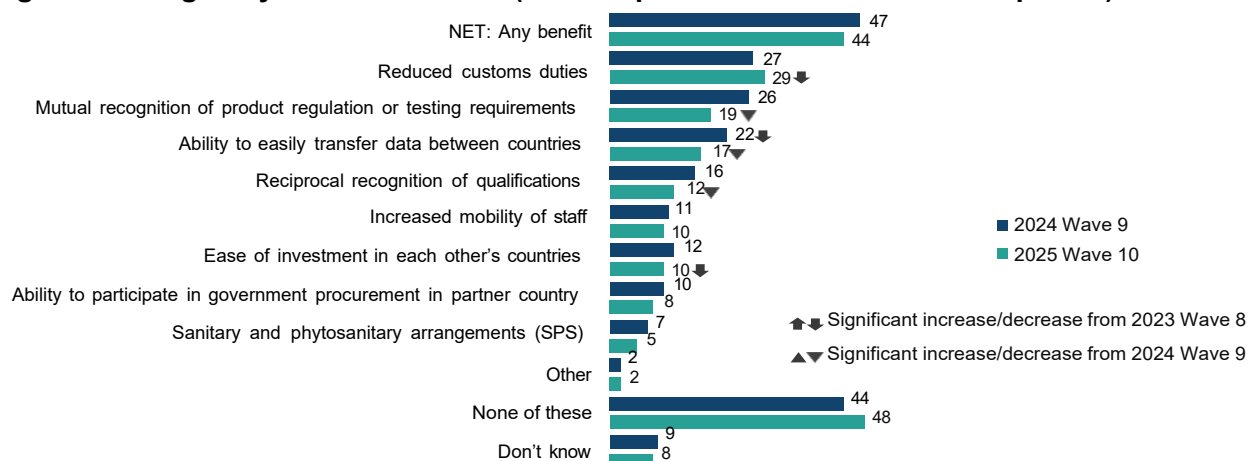
Source: FTA2. Thinking about the goods or services you most frequently export, are they eligible for any of the following benefits?

Base: All £500,000+ turnover businesses who have ever exported: 2024 W9 / 2025 W10 (887 / 836)

Businesses who said they had imported before were also asked about the benefit eligibility of their goods or services. In 2025, 44% said they were eligible for any benefit. Though not a significant decrease, continued a year-on-year decline from 2023 when this question was introduced (54% in 2023, 47% in 2024).

Similar to exporters, the benefit of reduced customs duties was cited by 29% of businesses who had imported, consistent with 2024 (27%). However, there were significant decreases among other specific benefits cited. One in 5 (19%) cited mutual recognition of product regulation or testing requirements, a decrease from 2024 (26%), ability to easily transfer data between countries (17%), down from 2024 (22%), and reciprocal recognition of qualifications (12%), down from 16% in 2024 (see Figure 6.5).

Figure 6.5: Eligibility for FTA benefits (% of respondents who have ever imported)



Source: FTA4. Thinking about the goods or services you most frequently import, are they eligible for any of the following benefits?

Base: All £500,000+ turnover businesses who have ever imported: 2023 W8 / 2024 W9 (1,100 / 1,016)

7. Supply Chains – (£500,000+ turnover businesses)

Understanding the supply chain issues facing businesses and the impact they have on their ability to export is a priority for DBT, particularly so in the context of COVID-19, EU Exit, and other global challenges.

This chapter focuses on businesses' experience of supply chains issues, what issues these were, and if and how they were resolved.

Overall, the findings from this chapter show that just under half of businesses (49%) have experienced supply chain issues. Those who were currently experiencing issues or had in the last 3 years were asked what they believe caused them, EU Exit (59%) and general economic/ inflationary pressure (54%) were the most cited cause for supply chain issues, for businesses who had supply chain issues, followed by COVID-19 (53%). Of businesses who had resolved issues they faced, almost half reported they had to wait until matters resolved themselves (47%), while 2 in 5 resolved these by finding alternative suppliers (40%). Over two thirds (71%) of businesses who believe their products or services could be exported said they had adequate supply chains to start or continue exporting.

Key findings

- Just under half of businesses (49%) said they had experienced supply chain issues, with one third reporting that the issues were now resolved (32%) and just under one in five reporting that they were still experiencing them (17%). One quarter had never experienced issues (24%) and a further quarter (26%) do not have a supply chain.
- The EU Exit and general economic/ inflationary pressure were the most cited cause for supply chain issues, mentioned by 59% and 54% retrospectively of businesses who had experienced supply chain issues.
- The proportion of business citing COVID-19 as the cause of supply chain issues continued to decrease in 2025 (53%). Mentions of war or conflict (31%) or strikes / industrial action (9%) also both decreased since 2024. A new code added in Q2 of Wave 10 'rising costs of tariffs', was cited by 29%.
- Almost half of businesses who had resolved the issues they had experienced said they had to wait until matters resolved themselves (47%), while 2 in 5 (40%) had found alternative suppliers, with 11% of these being in the UK and 6% overseas. Just 1% received advice or support from any sources to resolve the issue.
- Of businesses who believe their products or services could be exported, 7 in 10 (71%) said they had adequate supply chains to start or continue exporting, one in five (22%) said they did not, and 7% said they did not know.

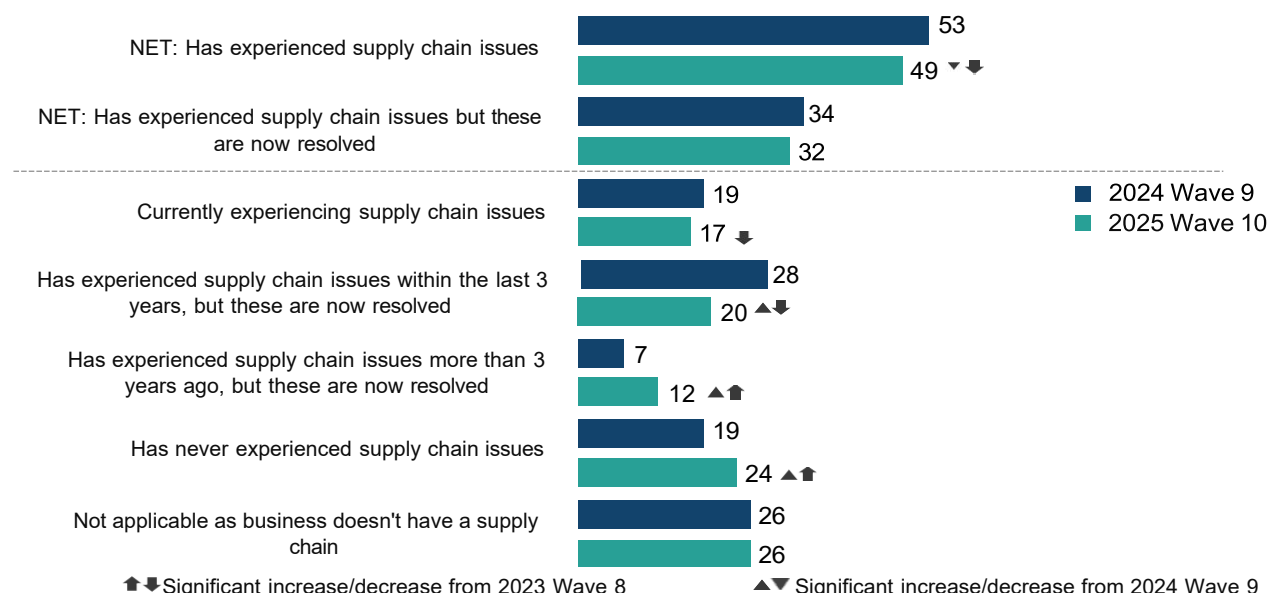
7.1 Experiences with supply chains

In 2025, all businesses were asked about their experience with supply chains. Just under half (49%) said they had experienced supply chain issues. This represents a decrease from 53% in 2024; see Figure 7.1. Around 1 in 3 (32%) said that they had experienced issues but that they are now resolved. Around 1 in 5 (17%) are currently experiencing supply chain

issues, consistent with 2024 (19%). One quarter (24%) had never experienced supply chain issues (up from 19% in 2024), while 26% said they do not have a supply chain.

Businesses in the 'Sustain' or 'Reassure' segments were more likely to have experienced supply chain issues (58%) than those in the 'Promote' or 'Challenge' segments (43%). Businesses in the wholesale and retail sector (67%) and manufacturing, raw materials, and energy sector (62%) were also more likely to have experienced issues than other sectors.

Figure 7.1: Businesses' experience of supply chains (% of all respondents)



Source: SCHAIN1. Which of the following best describes your business's experience of supply chains?

Base: 2024 W9 / 2025 W10: All £500,000+ businesses (2,182 / 2,122)

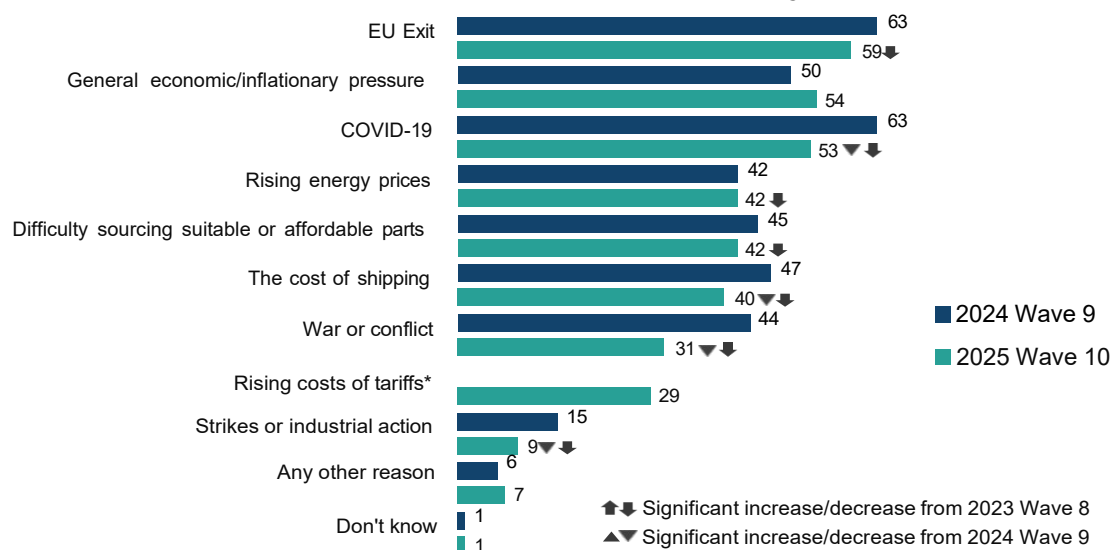
7.2 Supply chain issues and resolutions

Businesses who said they had experienced supply chain issues in the last 3 years or were currently experiencing them were asked what they felt caused these issues. The EU exit was the most common reason, cited as a cause for supply chain issues by 59% of businesses, a decrease from when this was first asked in 2023 (65%).

The next most cited reason was general economic or inflationary pressure (54%). A similar proportion (53%) cited COVID-19, a decrease from 63% in 2024 and 72% in 2023. Other cited reasons included rising energy prices (42%), difficulty sourcing suitable or affordable parts (42%) or the cost of shipping (40%). Around 3 in 10 mentioned war or conflict (31%), a decrease from 2024 (44%). A new code added in Q2 of Wave 10, rising costs of tariffs, was cited by 29%. Around 1 in 10 (9%) cited strikes or industrial action, a decrease from 15% in 2024, and a sale, merger or acquisition of a business within a supply chain (8%, added in Q3 of Wave 10). All other reasons for supply chain issues mentioned were less than 3%.

Exporters or potential exporters ('Sustain', 'Reassure' or 'Promote' segments) were more likely to cite EU Exit as a cause (65%) than those who do not have products or services suitable for export ('Challenge' segment, 50%).

Figure 7.2: Cause of supply chain issues (% of respondents currently experiencing supply chain issues, or have experienced them within the last 3 years)



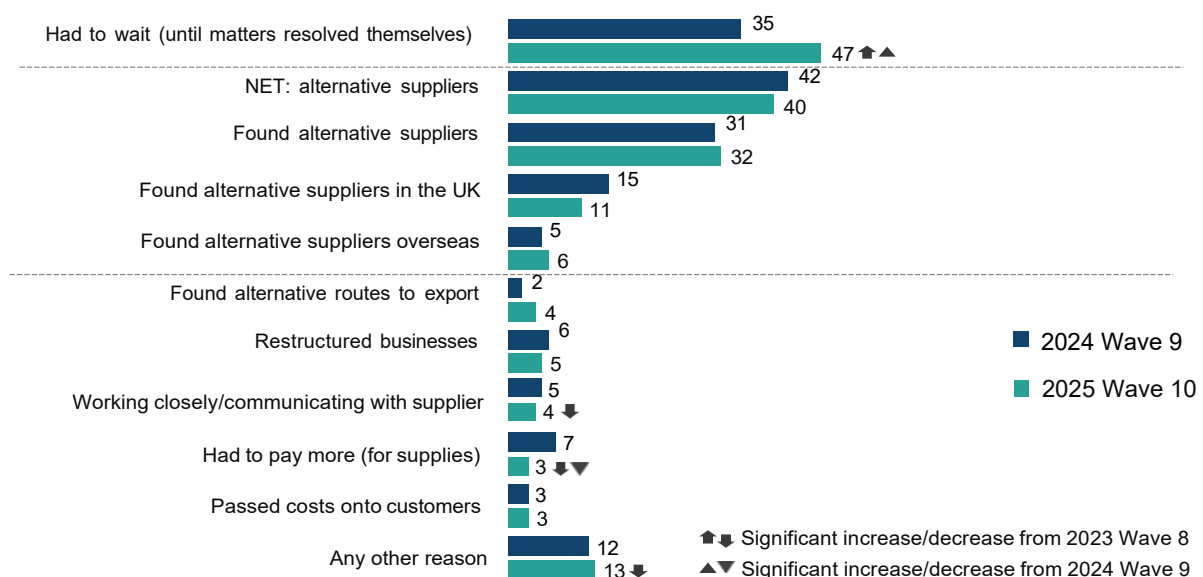
Source: SCHAIN2. Which of the following do you feel caused the supply chain issues you are currently experiencing / experienced within the last few years?

Base: 2024 W9 / 2025 W10: All £500,000+ businesses currently experiencing supply chain issues, or have experienced them within the last 3 years (1,077 / 831)

*New code added W10Q2

All businesses who had experienced supply chain issues within the last 3 years, but had now resolved them, were asked how they were resolved. As seen in Figure 7.3, 2 in 5 businesses (40%) said they found alternative suppliers, with 11% of these being in the UK and 6% overseas. Almost half (47%) said they had to wait until matters resolved themselves, an increase from 35% in 2024.

Figure 7.3: How supply chain issues were resolved (% of respondents who have experienced supply chain issues within the last 3 years, which are now resolved)



Source: SCHAIN3. How were you able to resolve the supply chain issues you experienced in the last few years?

Base: 2024 W9 / 2025 W10: All £500,000+ businesses who have experienced supply chain issues within the last 3 years, which are now resolved (632 / 461). Only showing responses given by at least 3% in 2025

7.3 Having adequate supply chains to start and continue exporting

Along with several other capabilities and resources, businesses with an exportable product or service were asked whether they had adequate supply chains to start or continue exporting. Seven in 10 (71%) said that they had adequate supply chains, while 22% said they did not, and 7% said they didn't know. Those who had exported (in the 'Sustain' or 'Reassure' segments) were more likely to say they had adequate supply chains (77%) than those who had not (in the 'Promote or challenge' segment; 57%).

8. Knowledge, information and support – (£500,000+ turnover businesses)

To be effective exporters, businesses need good levels of knowledge about exporting as well as where to go for help, information and support. It is also necessary for businesses to be willing to seek advice and support. This chapter looks at knowledge levels for exporting-related topics as well as use of and interest in using support and advice from DBT, the government, and other sources.

Overall, the findings from this chapter substantiate conclusions from previous chapters that businesses have knowledge gaps in relation to exporting, including how to export and where to go for information, help or advice. Businesses have continued to use internet searches, government websites and personal connections (including friends, colleagues, business associates and informal connections) to source information.

Key findings

- One in 5 businesses who do or could export felt they had a **high** level of knowledge about how to export (19%). This is in line with 2024 (20%) but represents a decline from 2018 (29%). A greater proportion (29%) reported low knowledge, in line with 2024 (31%). The proportion reporting a **moderate** level of knowledge has remained relatively stable over recent years. After decreasing to 49% in 2024, there was a slight but not significant increase to 52% in 2025.
- Around 1 in 4 businesses felt they had a **high** level of knowledge about where to go for information on exporting (24%) or help and support (22%). Though not significant changes from 2024, these figures are both declines since 2018 (34% and 32% respectively), and the lowest ever reported. The proportion of those reporting a moderate level of knowledge about where to go for information about exporting (59%) and help and support with exporting (58%) both increased since 2024 (both 52%), and represents an upwards trend, with an increase from 2018 (44% and 46% respectively).
- Of businesses who have exported or could export, over 2 in 5 (40%) reported having ever sought advice or information about exporting from any source, in line with 2024 (43%) and remaining higher than 2020 (33%).
- Of businesses who have exported or could export, 80% were aware of any UK government trade support services, an increase from 2024 (72%). Half had used any of these services (50%), in line with 2024 (45%). GOV.UK tools were the most popular (used by 36% of businesses who have ever exported or could export).

8.1 Current knowledge about exporting

Businesses that had exported or saw their goods or services as suitable for export ('Sustain', 'Reassure' and 'Promote' segments)³⁶ were asked to self-assess their level of knowledge

³⁶ See section 3.5 'Segment Definitions' for a full explanation.

about various aspects of exporting on a 0 to 10 scale. In this section their responses have been grouped into 3 bands:

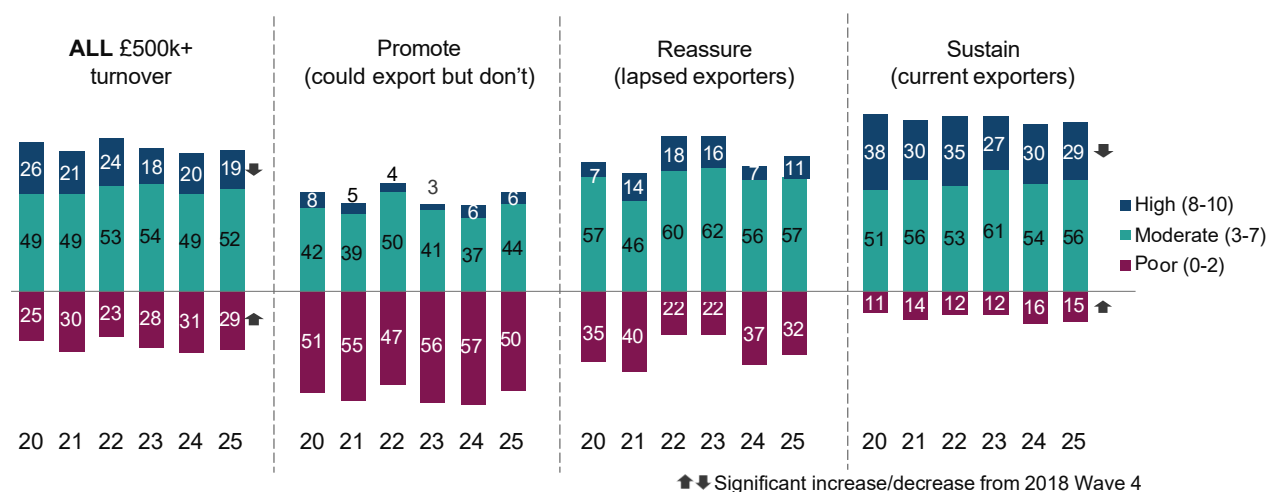
- a score of 8 to 10 has been classified as a 'high level of knowledge'
- a score of 3 to 7 is classified as a 'moderate knowledge level'
- a score of 0 to 2 represents 'poor or no knowledge'

As shown in Figures 8.1 and 8.2, 1 in 5 businesses who do or could export felt they had a **high** level of knowledge about how to export (19%). This is in line with 2024 (20%) but represents a decline from 2018 (29%).

Correspondingly, just under 3 in 10 (29%) reported having **poor** knowledge of how to export in 2025, in line with 2024 (31%). The proportion reporting a **moderate** level of knowledge has remained relatively stable in recent years. After decreasing to 49% in 2024, there was a slight but not significant increase to 52% in 2025.

Businesses in the 'Sustain' segment were more likely to score their knowledge about how to export highly (29%) than 'Reassure' (11%) or 'Promote' (6%).

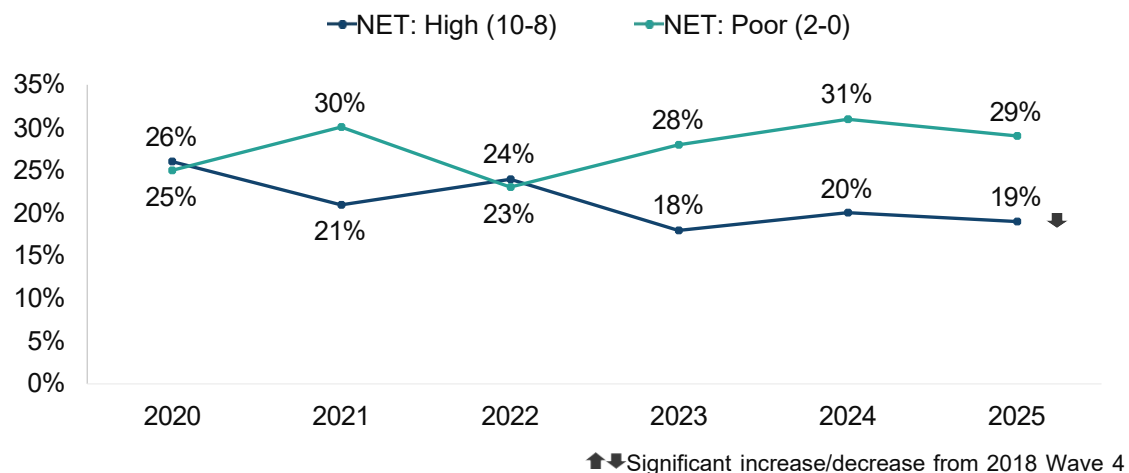
Figure 8.1: Description of current knowledge about how to export (% of all who could export)



Source: Q30 (EXP_KNOW). On a scale of 0 to 10, where 10 means you have very good knowledge and 0 means you have no knowledge at all, how would you describe: Your knowledge of HOW to export

Base: All £500k+ turnover businesses for whom exporting is possible 2020 W 5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: (1,564 / 1,642 / 1,530 / 1,362 / 1,270 / 1,198); Promote (368 / 351 / 341 / 380 / 365 / 351), Reassure (148 / 217 / 196 / 152 / 130 / 129), Sustain (1,025 / 1,052 / 974 / 805 / 757 / 707)

Figure 8.2: Time series for description of current knowledge about how to export (% of all who could export)



Source: Q30: EXP_KNOW: On a scale of 0 to 10, where 10 means you have very good knowledge and 0 means you have no knowledge at all, how would you describe: Your knowledge about HOW to export

Base: All respondents with an annual turnover of £500k+, excluding those whose products / services would never be suitable for export: 2020 W5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / W10 (1,564 / 1,642 / 1,530 / 1,362 / 1,270 / 1,198)

8.2 Knowledge about where to go for information, help and support

Businesses that had exported or saw their goods or services as suitable for export were also asked to self-assess their level of knowledge about where to go for information, help and support about exporting.

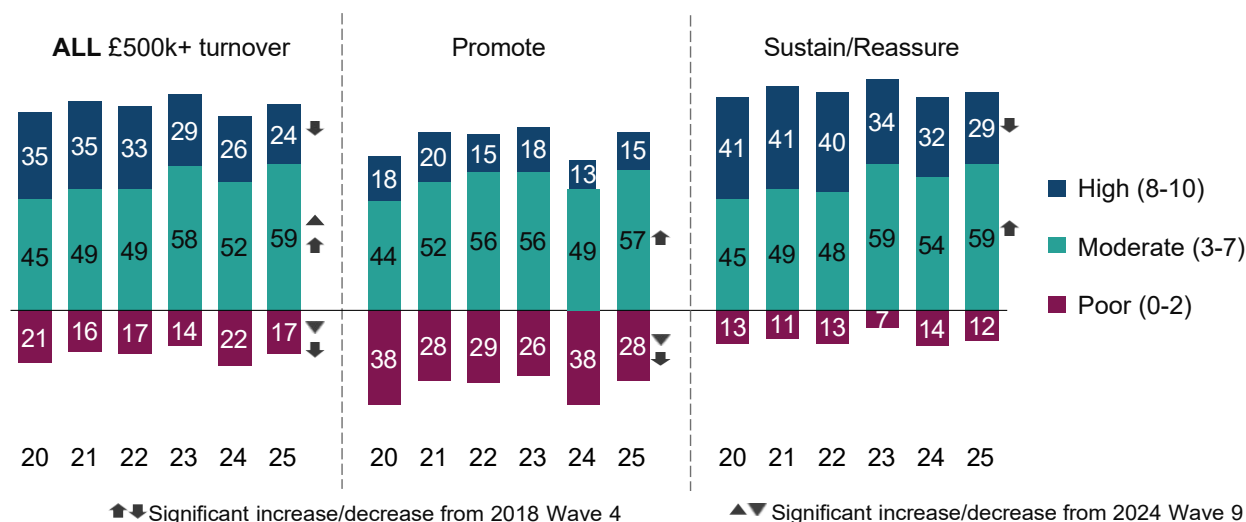
As shown in Figures 8.3, 8.4, and 8.5, in 2025 there has been a decrease in businesses reporting **poor** knowledge about where to go for information about exporting (17%, compared with 22% in 2024). The proportion reporting a poor knowledge of where to go for help and support with exporting decreased slightly but not significantly so (19% compared with 23% in 2024).

At the same time, the proportion of businesses reporting **high** knowledge has decreased, while the proportion reporting **moderate** knowledge has increased. In 2025, around 1 in 4 businesses felt they had a high level of knowledge about where to go for information on exporting (24%) or help and support (22%). Though not significant changes from 2024, these figures are both declines since 2018 (34% and 32% respectively), and the lowest ever reported. The proportion of those reporting a moderate level of knowledge about where to go for information about exporting (59%) and help and support with exporting (58%) both increased since 2024 (both 52%), and represents an upwards trend, with an increase from 2018 (44% and 46% respectively).

Among the 'Promote' segment, across the period 2018 to 2023, the proportion of businesses who reported **moderate** knowledge of where to go for information on exporting has increased from 41% to 56%, with 2024 seeing a decrease, but not significantly so, to 49%. However, in 2025, this increased to 57%, continuing the increasing trend. The proportion of this segment reporting low levels of knowledge had gradually declined from 40% in 2018 to 26% in 2023. In 2024, it saw a sharp increase in 38%. However, in 2025, decreased to 28%, in line with previous years.

Those in the 'Promote' segment remained more likely to rate their knowledge of where to go for information or help and support as lower than those in the 'Sustain'³⁷ and 'Reassure'^{Error!} segments. 'Sustain/Reassure' businesses were more likely to report a high level of knowledge of where to go for information on exporting than those in the 'Promote' segment (29% compared with 15%).

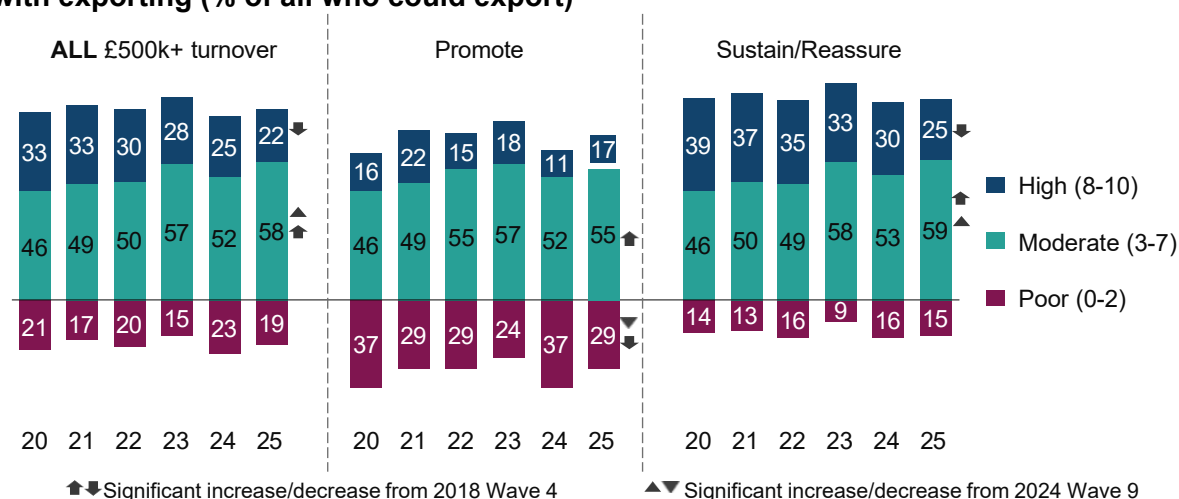
Figure 8.3: Description of current knowledge about: where to go for information about exporting (% of all who could export)



Source: Q30 (EXP_KNOW). On a scale of 0 to 10, where 10 means you have very good knowledge and 0 means you have no knowledge at all, how would you describe: Your knowledge of where to go for INFORMATION about exporting

Base: All £500k+ turnover businesses for whom exporting is possible 2020 W5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: (1,564 / 1,642 / 1,530 / 1,362 / 1,270 / 1,198); Promote (368 / 351 / 341 / 380 / 365 / 351), Sustain/Reassure (1,173 / 1,269 / 1,170 / 957 / 887 / 836)

Figure 8.4: Description of current knowledge about: where to go for help and support with exporting (% of all who could export)

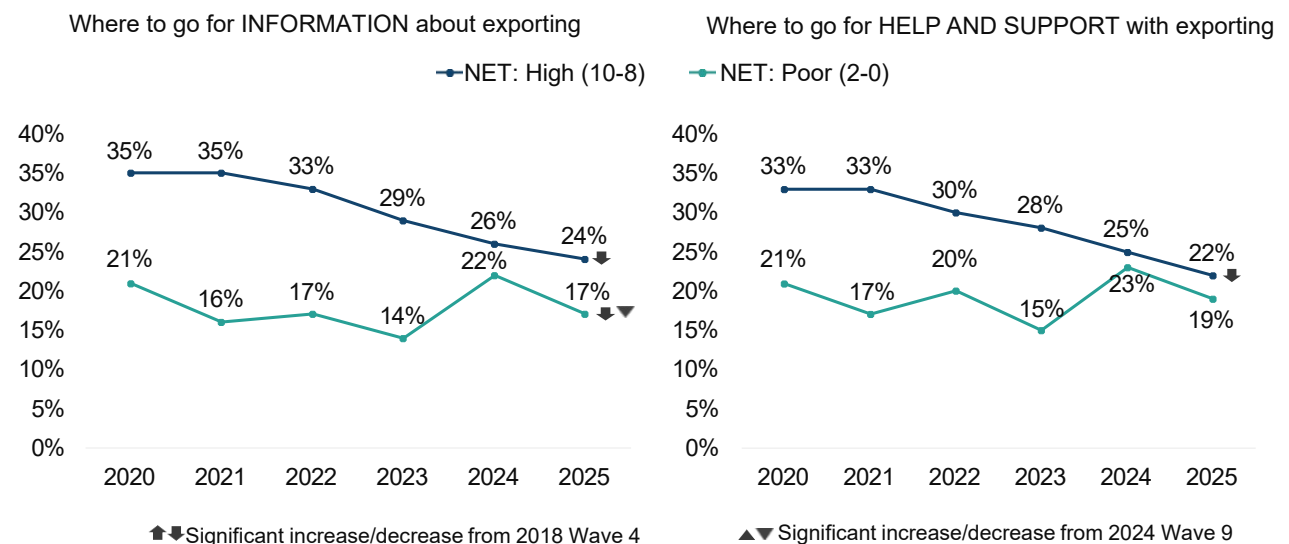


³⁷ See section 3.5 'Segment Definitions' for a full explanation.

Source: Q30 (EXP_KNOW). On a scale of 0 to 10, where 10 means you have very good knowledge and 0 means you have no knowledge at all, how would you describe: Your knowledge of where to go for HELP AND SUPPORT with exporting

Base: All £500k+ turnover businesses for whom exporting is possible 2020 W5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: (1,564 / 1,642 / 1,530 / 1,362 / 1,270 / 1,198); Promote (368 / 351 / 341 / 380 / 365 / 351), Sustain/Reassure (1,173 / 1,269 / 1,170 / 957 / 887 / 836)

Figure 8.5: Time series for description of current knowledge about: where to go for information about / help and support with exporting (% of all who could export)



Source: Q30 (EXP_KNOW). On a scale of 0 to 10, where 10 means you have very good knowledge and 0 means you have no knowledge at all, how would you describe: Your knowledge of where to go for INFORMATION about exporting / Your knowledge of where to go for HELP AND SUPPORT with exporting

Base: All respondents with an annual turnover of £500k+ excluding those whose products / services would never be suitable for export: 2020 W5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / W10 (1,564 / 1,642 / 1,530 / 1,362 / 1,270 / 1,198)

8.3 Interest in support and advice about exporting

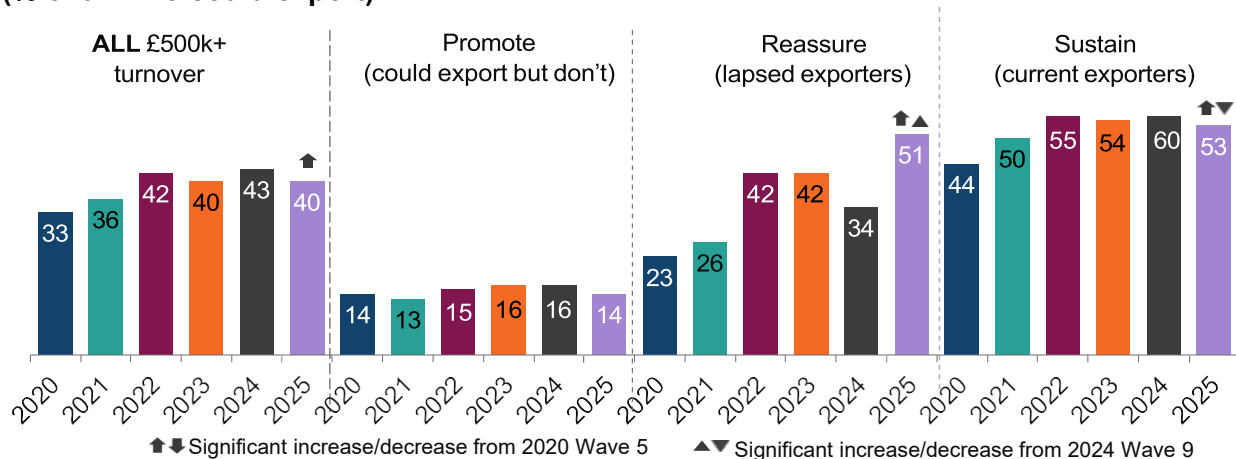
Among businesses that had previously exported or who identified their goods or services as suitable for export, 2 in 5 (40%) said they had previously sought advice about exporting, consistent with 2024 (43%) though remains higher than 2020 (33%, see Figure 8.6).

The percentage of businesses seeking advice and support was greatest in the 'Sustain' segment compared with the other segments, having risen since 2020 from 44%, to 60% in 2024, though decreased in 2025 (53%) to levels similar to those in the 'Reassure' segment. Correspondingly, the proportion of 'Reassure' segment businesses accessing information and support increased, from 34% in 2024 to 51% in 2025, a positive indication that these lapsed exporters may be looking to resume exporting. Within the 'Promote' segment, the proportion of businesses seeking advice has been stable since 2020 (14% in 2020 and remaining at 14% in 2025).

Businesses in Scotland (51%) were most likely to report they had sought out advice or support about exporting, with businesses in the North East being least likely (22%).

Businesses in the manufacturing, raw materials and energy sector (52%) were more likely to have sought support compared with those in construction and real estate (29%), information and communication (28%), professional services (37%) and wholesale and retail (40%) sectors.

Figure 8.6: Whether businesses have ever sought advice and support about exporting (% of all who could export)



Source: Q33 (EXPAD_B). Have you ever sought advice and support about exporting?

Base: All £500k+ turnover businesses for whom exporting is possible 2020 W5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: (1,564 / 1,642 / 1,530 / 1,362 / 1,270 / 1,198); Promote (368 / 351 / 341 / 380 / 365 / 351), Reassure (148 / 217 / 196 / 152 / 130 / 129), Sustain (1,025 / 1,052 / 974 / 805 / 757 / 707)

8.4 Awareness and usage of DBT export services

In the last quarter of 2021, a new question was introduced for all businesses (excluding those whose products would never be suitable for export), designed to assess which government support services they were aware of (Figure 8.7). In 2025, new codes were added for:

- Business.gov.uk (added W10Q2)
- UK Export Finance

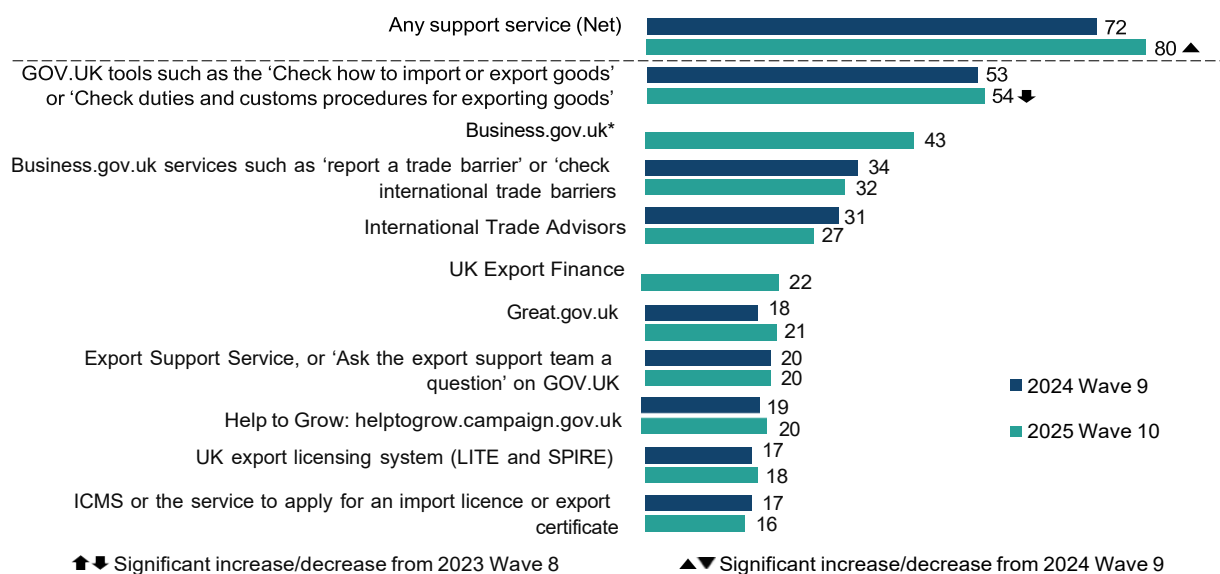
In 2025, 4 in 5 businesses reported being aware of at least one support service (80%), an increase from 72% in 2024. In line with last year, the most common of these were GOV.UK tools (54%), but this was also a decrease compared to 2023 (68%).³⁸ Just over 2 in 5 mentioned Business.gov.uk (43%).³⁹ Around 1 in 3 mentioned business.gov.uk services: 'report a trade barrier' or 'check international trade barriers' (32%) and International Trade Advisors (27%).

³⁸ GOV.UK tools include 'Check how to import or export goods' and 'Check duties and customs procedures for exporting goods'.

³⁹ Reported awareness and usage of the Business.gov.uk website should be interpreted with caution. It was added to the survey shortly prior to DBT's official launch and communications to businesses in July 2025. Clarification was added to the survey during Q2 fieldwork to ensure this was not confused with GOV.UK webpages. However, reported awareness and use may still be overstated.

Around 1 in 5 mentioned UK Export finance (22%), great.gov.uk (21%), Export Support Service (20%), Help to Grow (20%), UK export licensing system (18%), and Import case management system (ICMS) (16%). This suggests a need for DBT to continue to focus on increasing awareness of the support services available to businesses.

Figure 8.7: Awareness of UK government trade support services (% of businesses excluding those whose products/services would never be suitable for export)



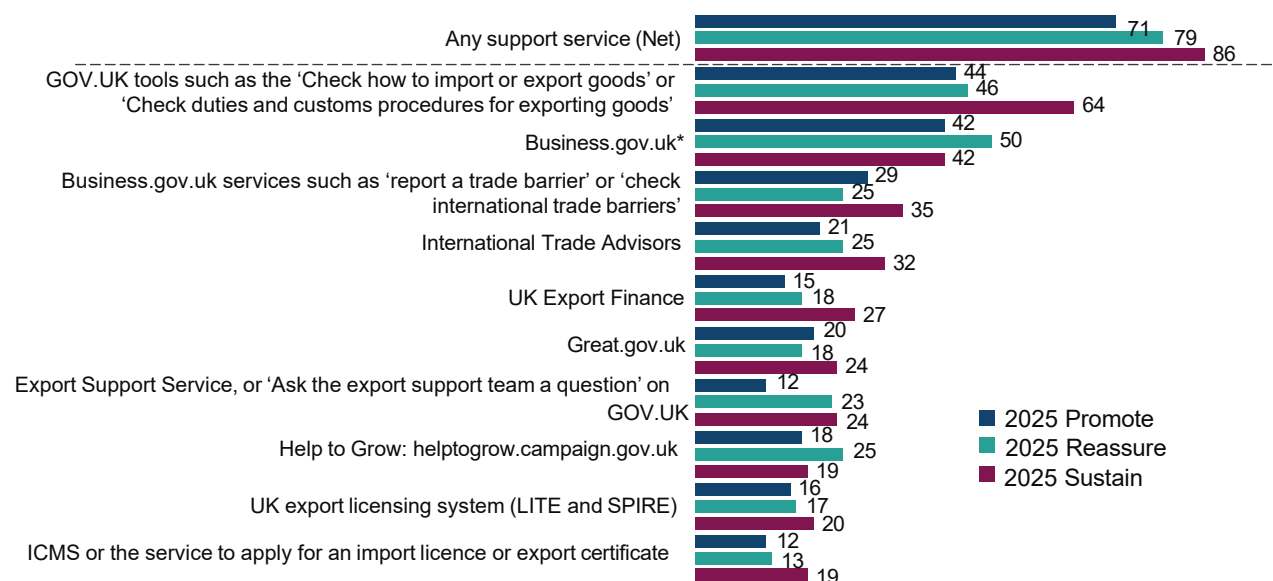
Source: Q34B. Which, if any, of the following UK government trade support services are you aware of?

Base: All £500k+ businesses excluding those whose products/services would never be suitable for export 2024 W9 / 2025 W10 (1,270 / 1,198) *Business.gov.uk added 2025 W10 Q2.

Businesses who had exported in the past 12 months (86%, in the 'Sustain' segment) and those that had exported over 12 months ago ('Reassure', 79%) were more likely to be aware of any UK government trade support service than those who could but have never exported ('Promote', 71%). The 'Sustain' segment group was more likely to be aware of GOV.UK tools (64%), such as 'Check how to import or export goods' or 'Check duties and customs procedures for exporting goods' than the 'Promote' segment (44%) and 'Reassure' segment (46%).

Businesses in the North East were most likely to be aware of at least one support service (96%), while those in Wales and Northern Ireland were least likely (both 71%).

Figure 8.8: Awareness of UK government trade support services by exporting segment (% of businesses excluding those whose products/services would never be suitable for export)



Source: Q34B. Which, if any, of the following UK government trade support services are you aware of?

Base: All £500k+ businesses excluding those whose products/services would never be suitable for export 2025 W10: Promote (351), Reassure (129), Sustain (707)

*Business.gov.uk added 2025 W10 Q2

A new question added in 2022 asked all respondents (excluding those businesses whose products/services would never be suitable for export) whether they had used any government trade support service (see Figure 8.9). In 2025, half of those who had heard of any support service reported that they had used one (50%), consistent with 45% in 2024. GOV.UK tools were again the most cited service, selected by 36%, a slight but not significant increase from 32% in 2024. The second most used service was Business.gov.uk³⁹ (19%) followed by Business.gov.uk services such as 'report a trade barrier' or 'check international trade barriers' (12%).

Businesses who have ever exported ('Sustain' or 'Reassure' segments) were more likely to have used any support service (57%) than those who had not exported ('Promote' or 'Challenge' segments; 34%). In particular, businesses who had exported were more likely to have used GOV.UK tools (43% compared with 22%) and Business.gov.uk services (such as 'report a trade barrier' or 'check international trade barriers') (16% compared with 7%).

Figure 8.9: Use of UK government trade support services (% of businesses excluding those whose products/services would never be suitable for export)



Source: Q34C. And which, if any, of these have you used?

Base: All £500k+ businesses excluding those whose products/services would never be suitable for export 2024 W9 / 2025 W10 (1,270 / 1,198) * New codes added at W10. Only showing new codes and responses given by at least 7% in 2025

8.5 Knowledge and skills gaps picked up throughout the survey

This section gathers and summarises businesses' knowledge and skills gaps that became apparent throughout the survey, to highlight groups for DBT to target.

One knowledge gap that surfaced in the survey findings is around Free Trade Agreements. Just under 1 in 5 (18%) of businesses who have ever exported or whose products could be developed for export said they do not know anything about FTAs, and just under a quarter (23%) combined knew 'a great deal' or 'a fair amount'.

Businesses in the 'Sustain' (28%) 'segment were more likely to know something about FTAs than those in the 'Promote' (15%) segment. Just over one third (35%) of businesses who have ever exported or whose products could be developed for export agreed that they are confident they would know how to trade through an FTA, with those in the 'Sustain' segment more likely to agree (42%) compared with 24% of those in the 'Promote' segment. This suggests a further need among businesses, especially those in the 'Promote' segment, to receive information on FTAs.

As in previous years, GOV.UK tools were most familiar among businesses, with just over half (54%) being aware of these in 2025, unchanged from 2024 (53%). Although this represents a decrease from 2023 (68%) and suggests DBT should continue to target awareness of these tools. Businesses who had ever exported (Sustain or Reassure) were most likely to be aware of (85%) and have used (57%) any support services, though there were no other notable differences in awareness or use by business size or sector.

9. Expectations for growth and trade – (£500,000+ turnover businesses)

Positive attitudes and interest in exporting are the starting points for businesses embarking on their exporting journey. This chapter looks at business innovation and plans for growth, trends in attitudes related to exporting, and expectations for growth in UK exports.

Overall, the findings from this chapter indicate that the proportion of businesses aiming to grow has decreased since 2024, with businesses more focused on consolidating. Between 2018 and 2024, there had been a general decline in the proportion of businesses who felt that the value of UK exports would **decrease**, indicating an incremental improvement in business confidence. However, this trend reversed in 2025, with the proportion expecting UK exports to decrease rising from 22% to 30%, suggesting a deterioration in confidence.

Key findings

- Almost two thirds of businesses were aiming to grow (65%), a slight, though not significant decrease from 68% in 2024. Almost one quarter, 23% stated that they were aiming for consolidation rather than growth (again a slight but not significant increase from 20% in 2024) and a further 12% felt they needed to return to profitability.
- Attitudes towards exporting were stable in the last year, although there has been an increase over the longer term in the proportion who feel there would not be enough demand for my business overseas to make it worthwhile (35%, up from 28% in 2020) and a decrease in those who feel there is a lot of support available to help small and medium businesses start exporting (24% in 2025 down from 35% in 2020).
- Perceptions of there being a lot of demand for UK products and services around the world had been declining since 2020 (63% in 2020 to 52% in 2023). However, in 2024 this increased, with 62% agreeing with the statement, and remained stable in 2025 (61%).
- The balance of opinion on expectations for growth in the value of UK exports over the next 12 months has become more negative over the last year. There has been an increase in the proportion who felt the value of UK exports would decrease (30% in 2025 up from 22% in 2024). Almost a third (32%) felt that the value of exports will stay the same in the next 12 months (down from 38% in 2024), while 22% felt that exports would increase, consistent with 2024 (24%).

9.1 Business thinking on growth

The question on growth was updated between 2020 and 2021 to reflect the potential impact of COVID-19 on business profitability. This reflected the fact that returning to profitability may be a key challenge for many businesses as they embarked on a road to recovery after COVID-19, but the question continues to be relevant given ongoing global events such as high energy prices, the rising cost of living, and general economic uncertainty.

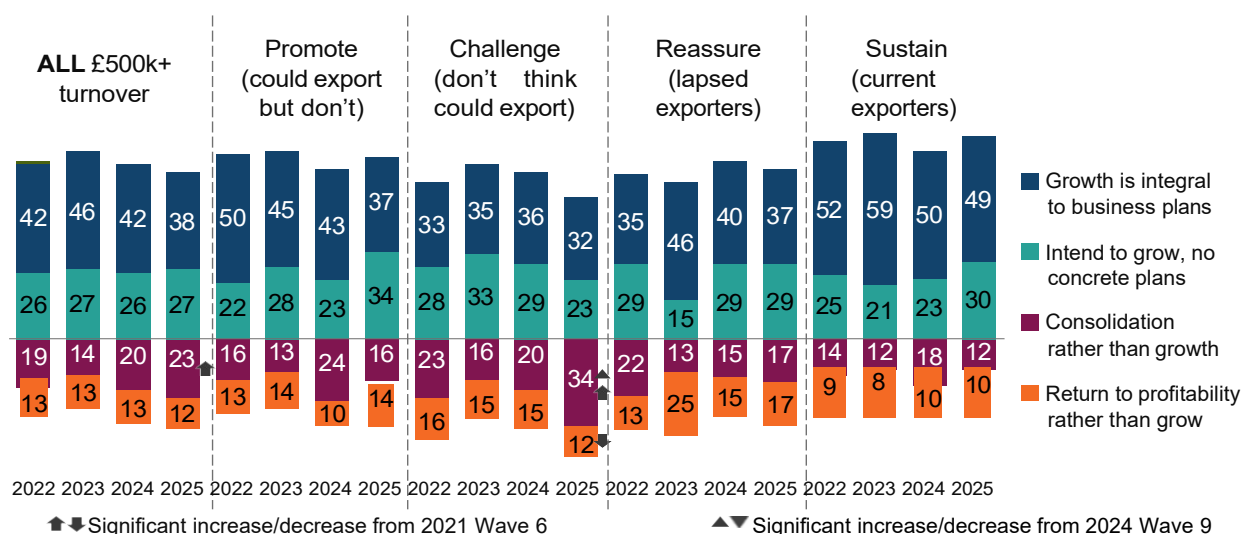
The introduction of an additional response option covering the return to profitability reduces the ability for direct year-on-year comparisons to be made with data collected prior to 2021, although the responses reflecting growth are broadly comparable with earlier years.

Overall, almost two thirds of businesses (65%) reported that they were aiming to grow, a small but not significant decrease from 2024 (68%). Growth was seen as integral to business

plans for 38%, while 27% intended to grow but had no concrete plans to achieve this. Almost one quarter (23%) stated that they were aiming for consolidation rather than growth, a slight but not significant increase from 20% in 2024, and a further 12% felt they needed to return to profitability. As shown in Figure 9.1, this indicates an incremental decrease in the proportion of businesses aiming to grow since 2023.

Businesses in the 'Sustain'⁴⁰ segment (current exporters) were the most likely to state that growth is an integral part of their business plans (49%). 'Challenge'⁴⁰ businesses (whose products or services were not suitable for export) were less likely than current exporters (Sustain) to report that growth is an integral part of their business plan (32%). Furthermore, the proportion of 'Challenge' businesses aiming to consolidate rather than grow their business increased from 20% in 2024 to 34% in 2025.

Figure 9.1: Current thinking on growth (% of all respondents)



Source: Q11 (GROWATT). Which of these best describes your thinking on growth?

Base: 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: All £500k+ turnover businesses: (2,405 / 1,087 / 1,085 / 1,043), Promote (341 / 200 / 174 / 165), Challenge (875 / 391 / 451 / 476), Reassure (196 / 78* / 73* / 46*), Sustain (974 / 408 / 378 / 347) [Half sample selected at random since 2023 W8]

* Base size is below 100; treat with caution

As in previous years, intentions to grow were stronger among larger businesses: 74% of large businesses (250+ employees) and 43% of medium businesses (50 to 249 employees) said growth was an integral part of their business plans, compared with 30% of micro businesses (0 to 9 employees). Micro businesses were more likely than other businesses to be aiming for consolidation (27% compared with 19%).

Businesses in the North West were most likely to state that growth was an integral part of their business plans (49%), higher than businesses in the East of England (30%) and Wales (29%). Those in the North East (26%) and East Midlands (20%) were more likely than businesses in other regions to be aiming for a return to profitability rather than growth.

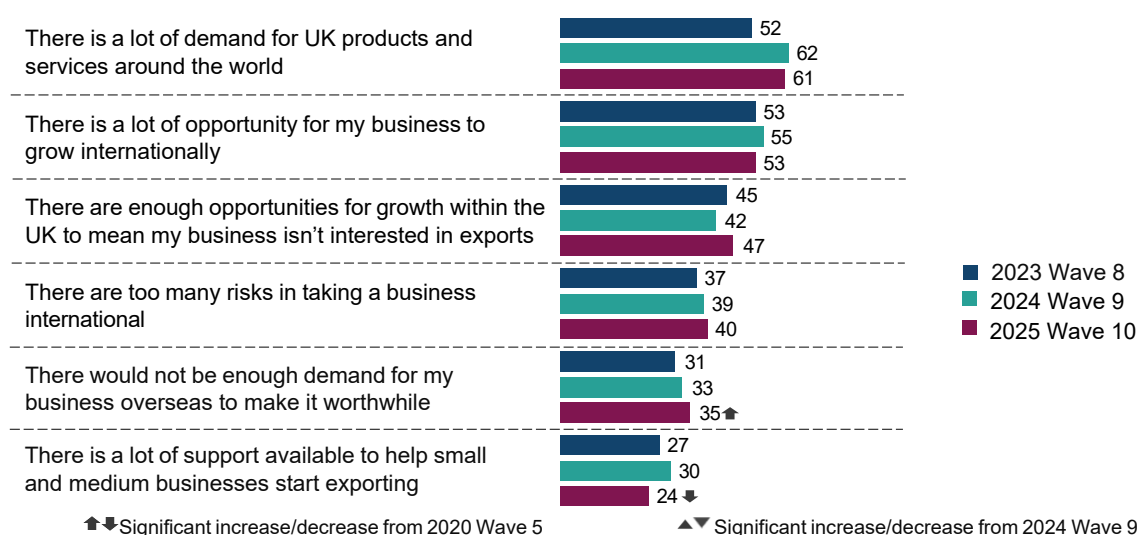
⁴⁰ See section 3.5 'Segment Definitions' for a full explanation.

9.2 Attitudes to exporting, and demand for UK products

Businesses with either experience of or potential for exporting were asked a series of questions about their attitudes towards exporting. The proportion who agreed with each statement (either strongly or slightly) is shown in Figure 9.2. Overall, the picture is broadly similar to the previous 5 years, although over this time there has been a decrease in the proportion who feel there is a lot of support available to help small and medium businesses start exporting (24% in 2025, down from 35% in 2020). There has also been an increase over time in businesses who feel there would not be enough demand for their business overseas to make exporting worthwhile (28% in 2020 to 35% in 2025).

Agreement that there is a lot of demand for UK products and services around the world had been declining from 2020 (63%) to 2023 (52%). In 2024, this increased, with 62% agreeing with the statement and remained stable in 2025 (61%). For reference, this measure peaked in 2017 when 73% thought there was a lot of demand and had been declining steadily since.

Figure 9.2: Attitudes to exporting (% of respondents who could/do export)



Source: Q31(EXP_STAT). To what extent do you agree or disagree that...

Base: 2023 W8 / 2024 W9 / 2025 W10: All who export or could potentially export: £500k+ turnover (706 / 635 / 604) [Half sample selected at random since 2023 W8]

Current exporters, in the 'Sustain' segment, were more likely than lapsed or potential exporters, (in the 'Reassure' or 'Promote' segments) to agree that there is a lot of opportunity for their business to grow internationally (68%, compared with 41% and 37% respectively). Conversely, businesses in the 'Reassure' and 'Promote' segments, which by definition have less of a focus on exporting, were more likely than 'Sustain' businesses to agree that:

- there are enough opportunities for growth in the UK (62% 'Reassure' and 67% 'Promote' compared with 31% 'Sustain')
- there would not be enough demand for their business overseas to make it worthwhile (53% 'Reassure' and 50% 'Promote' compared with 20% 'Sustain')
- there are too many risks in taking a business international (52% 'Promote' compared with 31% 'Sustain')

Just under 1 in 7 (15%) lapsed exporters (in the 'Reassure' segment) and just under 2 in 10 (18%) of potential exporters (Promote) agreed that there is a lot of support available to help

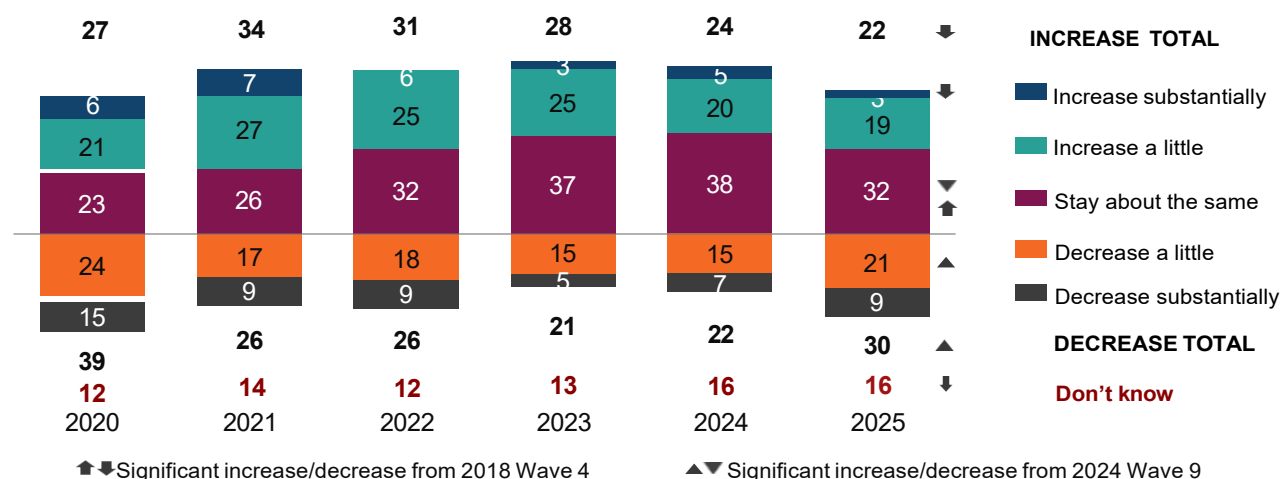
small and medium businesses start exporting. By comparison, 30% of current exporters agreed with this statement in 2025, though this has also seen a decrease over time (41% in 2020). More visible and/or additional targeted communications around help and support services may be required to improve this measure.

9.3 Expectations for growth over the next 12 months

To get a sense of business confidence in the prospects for UK exports, businesses were asked whether they believed the value of UK exports would increase, decrease or stay the same over the next 12 months.

Around 1 in 5 (22%) believed the value of UK exports would increase, consistent with 2024 (24%), though represents a decline from earlier years (see Figure 9.3). Three in 10 businesses (30%) believed it would decrease, an increase from 2024 (22%).

Figure 9.3: Whether businesses believe value of UK exports will increase or decrease over the next 12 months (% of all respondents)



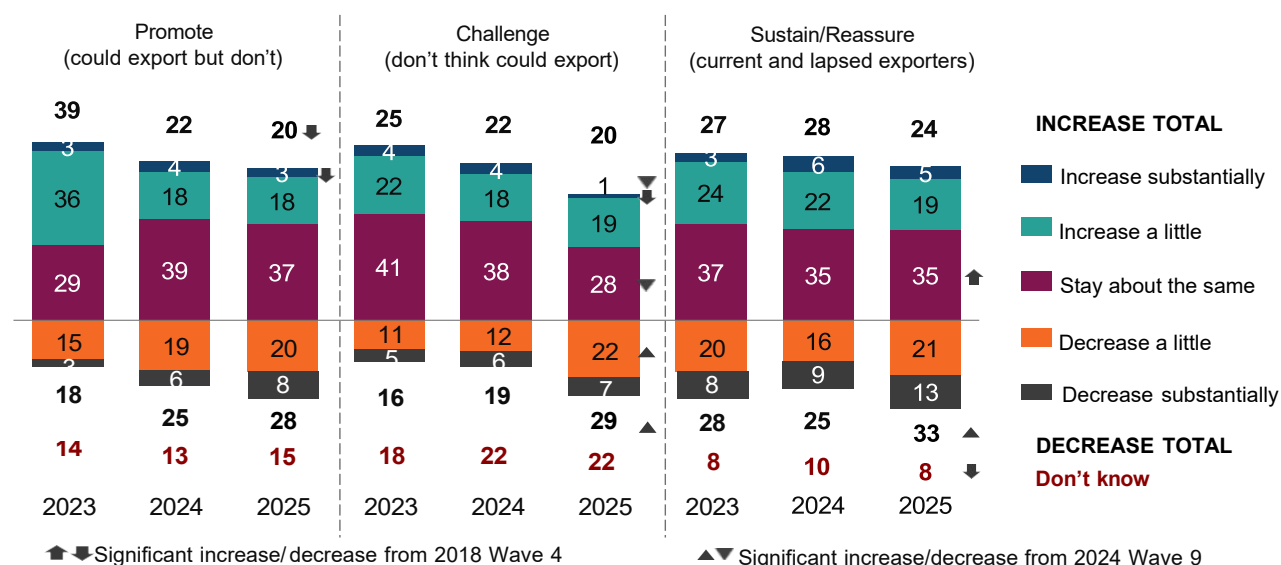
Source: Q40b. And over the next 12 months or so, do you think that the total value of exports by UK businesses will...

Base: 2020 W5 / 2021 W6 / 2022 W7* / 2023 W8* / 2024 W9* / 2025 W10*: All £500k+ turnover businesses (2,557 / 2,485 / 1,199 / 1,094 / 1,097 / 1,079)

* Half sample selected at random in W8, W9, W10

Businesses in the 'Sustain' and 'Reassure' sectors (current and lapsed exporters) were more likely than those in other segments to feel that the value of UK exports would increase over the next 12 months (24%; Figure 9.4). However, the proportion of these businesses who felt the value of UK exports would decrease, increased from 25% in 2024 to 33% in 2025, driving the overall negative balance shift. Around 1 in 5 (20%) of businesses in the 'Promote' sector (those who had not exported but whose product or service could be suitable), felt that the value of UK exports would increase, while 28% felt they would decrease.

Figure 9.4: Whether businesses believe value of UK exports will increase or decrease over the next 12 months (% of all respondents)



Source: Q40b. And over the next 12 months or so, do you think that the total value of exports by UK businesses will...

Base: 2023 W8* / 2024 W9* / 2025 W10*: Promote (180 / 191 / 186), Challenge (428 / 461 / 448), Sustain/Reassure (471 / 436 / 443)

* Half sample selected at random in W8, W9, W10

By region, those in the North East were most likely to feel that the value of UK exports would increase in the next 12 months (28%). By sector, this view was most likely to be held by those in education and health (29%) and professional services (26%).

10. Importing – (£500,000+ turnover businesses)

This chapter covers businesses' importing activity and eligibility for FTA benefits. These questions on importing were added in 2023.

Key findings

- Just under half of businesses had imported (45%). Just under 2 in 5 businesses (38%) had imported in the last 12 months and 6% had not imported in the last 12 months but had done so previously.
- Businesses in the 'Sustain' segment were most likely to have imported in the last 12 months and businesses in the 'Reassure' segment were most likely to have imported, but not in the last 12 months, suggesting that exporting and importing behaviour is closely related.
- Over 2 in 5 (44%) said they were eligible for any benefit arising from an FTA when importing goods or services. Reduced customs duties was cited by just under 3 in 10 businesses (29%), followed by mutual recognition of product regulation or testing requirements (19%) and ability to easily transfer data between countries (17%).

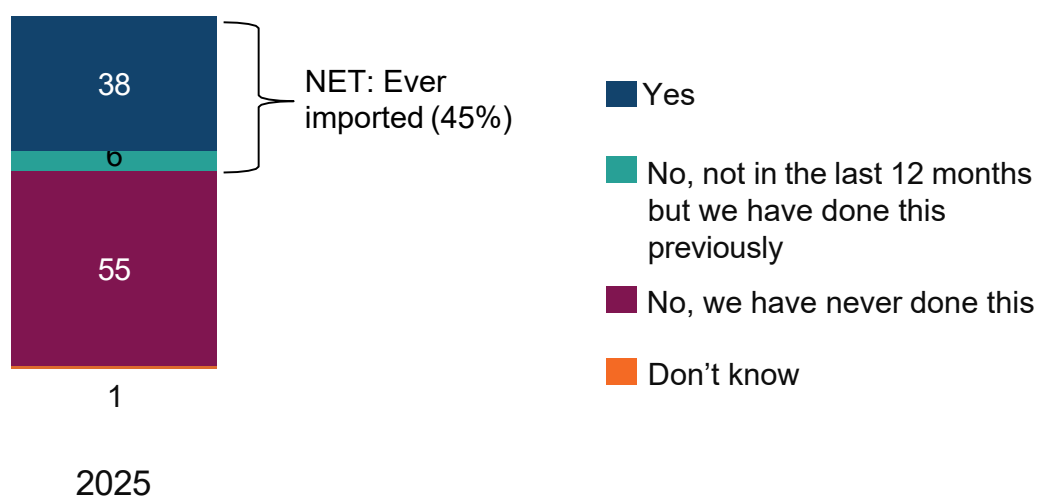
10.1 Importing activity

All businesses were asked about whether they had imported over the past 12 months (Figure 10.1). Just under half of businesses (45%) had imported, with 38% having done so in the last 12 months and 6% having done so previously. This was in line with findings from 2024.

Businesses in the 'Sustain' segment were most likely to have imported in the last 12 months (69%) compared with all other segments (56% 'Reassure', 39% 'Promote', 17% 'Challenge'). 'Reassure' businesses were most likely to have imported more than 12 months ago (12%) compared with all other segments (6% 'Sustain', 10% 'Promote', 4% 'Challenge').

Businesses in manufacturing, raw materials, and energy (57%) and wholesale and retail (56%) sectors (56%) were most likely to have imported in the last 12 months. Education and health (12%) and finance and insurance (7%) sectors were least likely to have imported in the last year.

Figure 10.1: Importing activity (% of all respondents)



Source: QIMP1. In the last 12 months has your business imported goods and services from outside the UK?

Base: All £500,000+ businesses: 2025 W10 (2,122)

10.2 Eligibility for FTA benefits

Businesses who said they had imported before were asked about the eligibility of their goods or services for benefits arising from FTAs. Over 2 in 5 (44%) said they were eligible for any benefit when importing goods or services, in line with 2024 (47%).

Reduced customs duties were cited by just under 1 in 3 businesses (29%), in line with 2024 (27%). This was followed by mutual recognition of product regulation or testing requirements (19%), ability to easily transfer data between countries (17%) and reciprocal recognition of qualifications (12%), all of which decreased from 2024 (26%, 22%, 16%, respectively). Findings for this question are explored in more detail in Chapter 6.4.

11. Advertising and campaign metrics – (£500,000+ turnover businesses)

As part of the NSRB, businesses are asked a series of questions about DBT's campaign activity, including awareness and recall of campaigns, as well as diagnostic measures to capture businesses' views on campaign relevance, clarity, support and information, and action that businesses have taken or plan to take as a result of seeing these campaigns. The campaign materials have changed over time, however. Since wave 7 (2022), questions have focussed on recognition of and diagnostics relating to the 'Made in the UK, Sold to the World' (MIUK) campaign, and the UK Export Academy campaign. It is useful to understand these campaign measures in line with the context below.

- Wave 1 was conducted prior to the launch of the Exporting is GREAT campaign. Subsequent waves have been conducted around bursts of campaign activity.
- Due to the variability of campaign activity, the relative timings of fieldwork have varied between waves.
- Wave 2 was conducted immediately after the campaign had aired.
- Wave 3 was conducted 3 months after the campaign had aired, which may have affected the recorded levels of campaign awareness.
- Wave 4 was conducted during campaign activity, so there was no time lag. However, the amount of activity which took place prior to fieldwork was lower than for previous waves, which may also have impacted on campaign awareness.
- 'Exporting is GREAT' campaign activity paused while the first quarter of wave 5 was in field and has not resumed since.
- From wave 2 through to wave 5 quarter 1, respondents were directed to a website which allowed them to view campaign materials during the telephone interview.
- In the time period covered by last half of wave 5 and beginning of wave 6, DBT's campaign activity was minimal to allow for the EU transition campaign in preparation for the UK's exit from the EU. In wave 6 quarter 4 new campaign activity was launched to direct businesses to export support services and export advice/webinars.
- For wave 7 and 8, respondents were again directed to a website which allowed them to view campaign materials during the telephone interview.
- 'Made in the UK, Sold to the World' (MIUK) launched in November 2021, prior to the start of wave 7 fieldwork and since then has been the singular export promotion campaign for the department. Marketing ran across paid media channels until March 2022 and then resumed in October 2022, continuing beyond the close of wave 7 fieldwork. Other services-based promotions such as those for the Export Support Service (ESS) and UK Export Academy (UKEA) are included under the umbrella of the MIUK campaign.
- Campaign materials were refreshed ahead of waves 8, 9 and 10, and businesses were shown the most up-to-date images from the MIUK and UKEA campaigns during fieldwork. Images for the great.gov.uk help and support pages were also introduced in wave 9 and refreshed in wave 10.

The multi-channel export promotion marketing campaign ran until 31 March 2025. At that point activity was paused and is expected to resume as a wider SME support campaign in

November 2025. Some low cost / no cost activity has still been running, including some export promotion work under Made in the UK, Sold to the World, as well as wider SME support and the launch of the Business Growth Service. While these changes did not affect the time period reported on in this report, this context is useful for understanding the current status of the campaign with regards to these results.

Questions about the recognition of 'Made in the UK, Sold to the World', UK Export Academy and great.gov.uk help and support pages are asked about in the NSRB. Diagnostic questions are also asked about 'Made in the UK, Sold to the World'. This campaign was developed during the period after the UK exited the European Union. As part of exiting the EU, the UK entered a year-long transition period on 31 January 2020, which allowed for the negotiation of a trade agreement between the UK and EU (and for businesses to prepare for any new rules arising from that trade agreement). As such, there was considerable government campaign activity from July 2020 and into early 2021 aimed at making businesses aware of when the transition period was ending and the need to prepare for the new rules. Over this period, DBT was only running relatively light-touch campaigns relating to exporting, or none at all. This was to allow for the EU transition messaging to be communicated to businesses while minimising 'noise' from any other campaigns focusing on different aspects of international trade.

In the final quarter of 2021, new campaign materials designed to direct businesses to export support services were launched and were refreshed in 2022. The 'Made in the UK, Sold to the World' campaign was also launched during International Trade Week 2021. Although the launch of the new campaign would have played a role in boosting awareness of advertising and publicity on the topic of exporting at the end of 2021, spend on the campaign was relatively low at this time and so the increases in awareness recorded in 2021 was likely to be attributable largely to the EU transition campaign. In 2022, the impact of DBT's 'Made in the UK, Sold to the World' campaign was more clearly measurable, although there was still evidence that recall of publicity from the EU transition period remains (in 2022, 4% of those who were spontaneously aware of advertising or publicity cited references to 'Brexit or preparing for Brexit' in the advertising they had seen). However, in 2023, references to Brexit or preparing for Brexit decreased to 1%, indicating a reduction in recall of the EU transition campaign.

The aim of the 'Made in the UK, Sold to the World' campaign is to shift attitudes in favour of exporting by making it feel possible and desirable for businesses. The aim is that this will encourage businesses to pursue international opportunities and increase the number of first-time exporters and businesses exporting into new markets. The campaign showcases real stories from successful exporters in a variety of sectors across the UK and demonstrates the range of opportunities that are available.

Alongside the core 'Made in the UK, Sold to the World' campaign, adverts for the UK Export Academy campaign and great.gov.uk help and support pages continued to signpost businesses towards specific export support.

Key findings

- High profile information and publicity around the EU Exit transition period contributed to raising levels of awareness of communications activity around exporting in 2021. Following an uplift in awareness in 2021, awareness reduced to more usual levels in 2022 (28%), and has continued to incrementally decline to 22% in 2025.
- Government remains the main source to which businesses attribute publicity around exporting. In 2025, general mentions of the UK government were unchanged (58%, compared to 57% in 2024). Specific mentions of the Department for Business and Trade

were also unchanged (16%, compared to 14% in 2023), though is an increase from 8% in 2020.

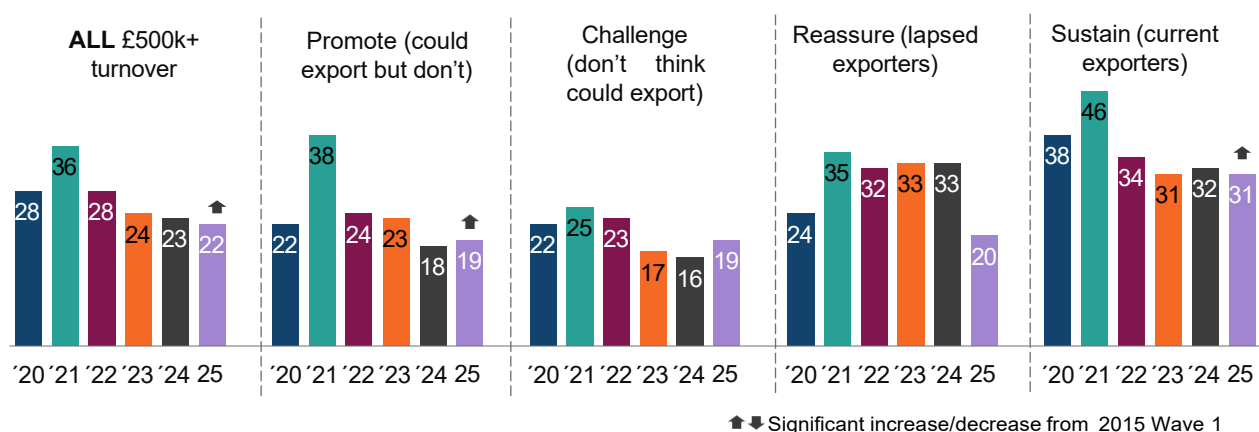
- The 'Made in the UK, Sold to the World' campaign was recognised by 21% of businesses, an increase from 11% in 2024, while 8% recognised adverts for the UK Export Academy campaign and 8% recognised the great.gov.uk help and support campaigns.
- Overall, the 2025 DBT MIUK campaign was seen as clear by 75% and a trusted source of information (69%). Just under half (46%) felt that the ads stood out. Just under 1 in 3 (29%) felt the campaign was relevant to them, an increase from 2022 (24%).
- The campaign was seen to contain new information by just over than 2 out of 5 (42%) businesses, down from 62% in 2022. Agreement that the ads made clear where to go for exporting information increased to 70% in 2025 from 57% in 2024.
- In total, 22% of those who viewed the ads had either taken some action as a result of seeing the ads previously, planned to take action, or would consider doing so in future. The main actions either taken, planned or considered were visiting the great.gov.uk website, DBT's great.gov.uk guidance and support pages, or research other aspects of an overseas market (e.g. demand, competitors etc).
- Just under 1 in 10 (8%) of those recognising the ads had already taken action at the time of interview, while 16% stated that there were actions (including additional actions) they planned to take or would consider taking in the future. This suggests that the campaigns are reasonably successful at prompting businesses to act if they are aware of them. However, overall awareness remains relatively low. DBT should aim to increase overall awareness and recognition of campaigns and ensure clear signposting and calls to action to encourage more businesses to explore exporting.

11.1 Awareness of advertising and information about exporting

Spontaneous awareness of 'any advertising, publicity or other types of information encouraging businesses to think about exporting' was first asked to all businesses in 2015. This created a baseline against which the potential impact of subsequent campaign activities could be measured. Spontaneous awareness increased in the year following the baseline (from 18% in 2015 to 30% in 2016), reflecting the launch of DBT's 'Exporting is GREAT' campaign. It then remained broadly consistent up until 2020, supported by ongoing bursts of campaign activity. Following an uplift in awareness in 2021, awareness reduced to more usual levels in 2022 (28%), and has continued to incrementally decline to 22% in 2025.

There has been variation over the years in spontaneous awareness of advertising and publicity about exporting between segments, although awareness has typically been higher in the exporting segments ('Sustain' and 'Reassure') than for those who had never exported ('Promote' and 'Challenge'). In 2025, awareness stood at 31% in the 'Sustain' segment, consistent with 2024. In the 'Reassure' segment, there was a decrease, though not significantly so, in awareness from 33% in 2024 to 20% in 2025. Around 1 in 5 (19%) of businesses in the 'Promote' segment were aware of advertising and publicity about exporting, in line with 2024 (18%). Within the 'Challenge' segment (those whose product or service is not suitable for export) awareness of publicity about exporting has previously remained at around 1 in 4 in the years since the 2015 baseline. In 2023, this decreased from 23% in 2022 to 16% in 2024, with this group driving the overall reduction in awareness. However, this has stabilised in 2025, increasing, though not significantly so, to 19%.

Figure 11.1: Spontaneous awareness of exporting publicity (% of all respondents spontaneously aware of exporting publicity)



Source: Q39. In the last year, have you seen or heard any advertising, publicity or other types of information encouraging businesses to think about exporting?

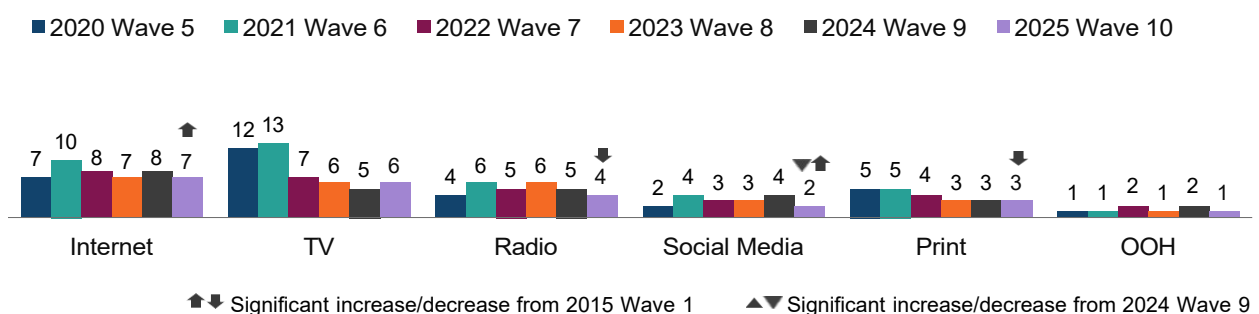
Base: 2020 W5 / 2021 W6[^] / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: All £500,000+ turnover businesses (2,557 / 1,243 / 2,405 / 2,181 / 2,182 / 2,122), Promote (368 / 165 / 341 / 380 / 365 / 351), Challenge (993 / 429 / 875 / 819 / 912 / 924), Reassure (148 / 100 / 196 / 152 / 130 / 129), Sustain (1,025 / 536 / 974 / 805 / 757 / 707)

[^] Random half sample at 2021 W6.

In 2025, spontaneous awareness of advertising or publicity about exporting by business size remained in line with 2024 levels. By sector, businesses in information and communication sector were most likely to be aware of advertising (32%), whereas those in the consumer discretionary sectors were least likely to be aware of advertising (17%). By region, awareness was highest in Northern Ireland (33%), and this was higher than the average across Great Britain (22%). Awareness was lowest in the Scotland and Wales at 18%.

Businesses were also asked to specify where they had seen or heard information or advertising about exporting. As in 2024, the internet (7%) was the most mentioned source, remaining higher than mentions of TV (6%, Figure 11.2). This reflects the different media focus of the 'Made in the UK, Sold to the World' campaign, which has not run on TV. This contrasts with the previous 'Exporting is GREAT' campaign and EU Exit campaigns, for which TV played an important role.

Figure 11.2: Source of awareness of information and advertising about exporting (% of all respondents spontaneously aware of exporting publicity on ...)



Source: Q40. Where did you see or hear this information or advertising?

Base: 2020 W5 / 2021 W6^ / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: All £500,000+ turnover (2,557 / 1,243 / 2,405 / 2,181 / 2,182 / 2,122) ^Random half sample at 2021 W6

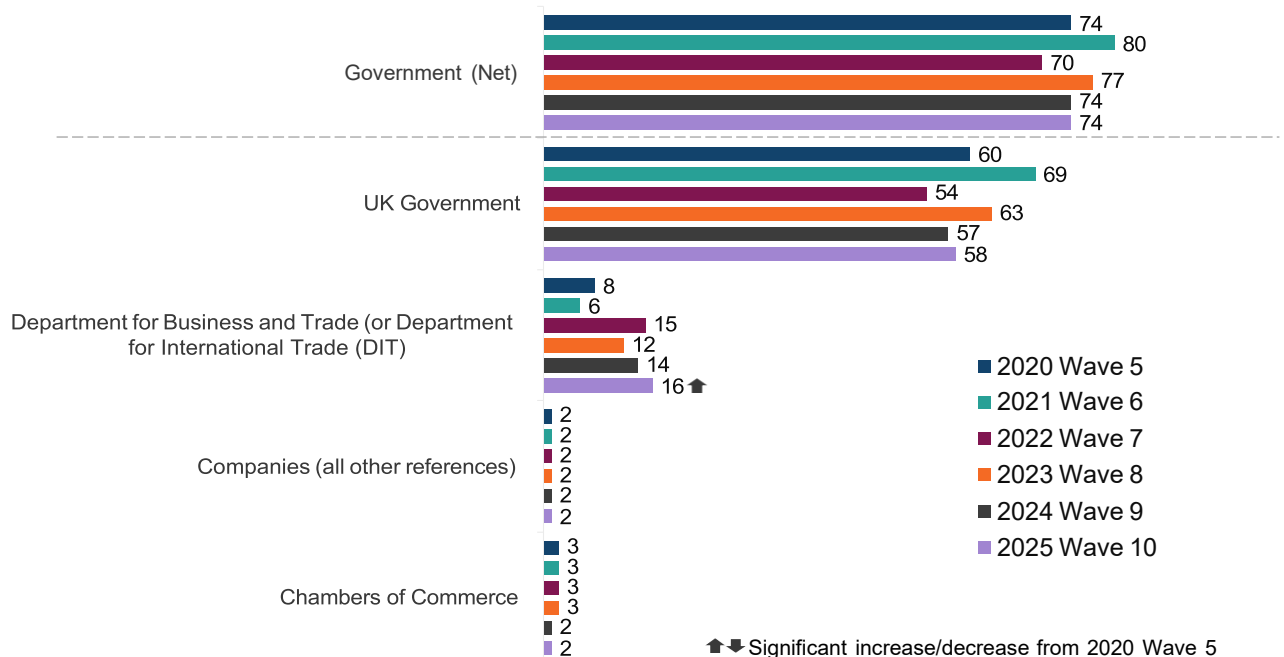
Businesses with experience of exporting (in the 'Sustain' and 'Reassure' segments) were more likely than non-exporters (in the 'Promote' and 'Challenge' segments) to be aware of publicity about exporting from the internet (10% compared with 5%), print (3% compared with 2%) and TV (7% compared with 5%).

Businesses that were aware of advertising or publicity were asked who they believed was responsible for what they saw. As in previous years, the government (net measure of all government bodies, campaigns and general reference to UK government) was the main source to which businesses attributed advertising (74%). Within this measure, there was no significant change in general attributions to the UK government (58%, compared to 57% in 2024). Attributions to the Department for Business and Trade (or DIT or DTI)⁴¹ was also unchanged in 2025 (16%, compared to 14% in 2024), though this was an increase from 2020 (8%, Figure 11.3).

Businesses in the 'Promote' segment (potential exporters) were more likely to attribute advertising to the UK government (71%) than those with experience of exporting (51%, 'Sustain' or 'Reassure' segments). However, those who had never exported were less likely to attribute advertising to the DBT compared to those who had exported before (20% in the 'Sustain' or 'Reassure' segments), compared to 12% in the 'Promote or Challenge' segments.

⁴¹ In 2022, mentions of Department for Trade and Industry (DTI) were combined with those for Department for International Trade (DIT) for the first time. DTI is a predecessor department to DIT and has not existed under that name since 2007. However, combining these mentions together is unlikely to have caused the large increase in attribution to DIT in 2022 as mentions of DTI had fallen to 2% in 2021. In 2023, this was changed to the Department for Business and Trade (or DIT or DTI).

Figure 11.3: Who businesses thought was responsible for information or advertising they saw (% of respondents who are aware of advertising/publicity)

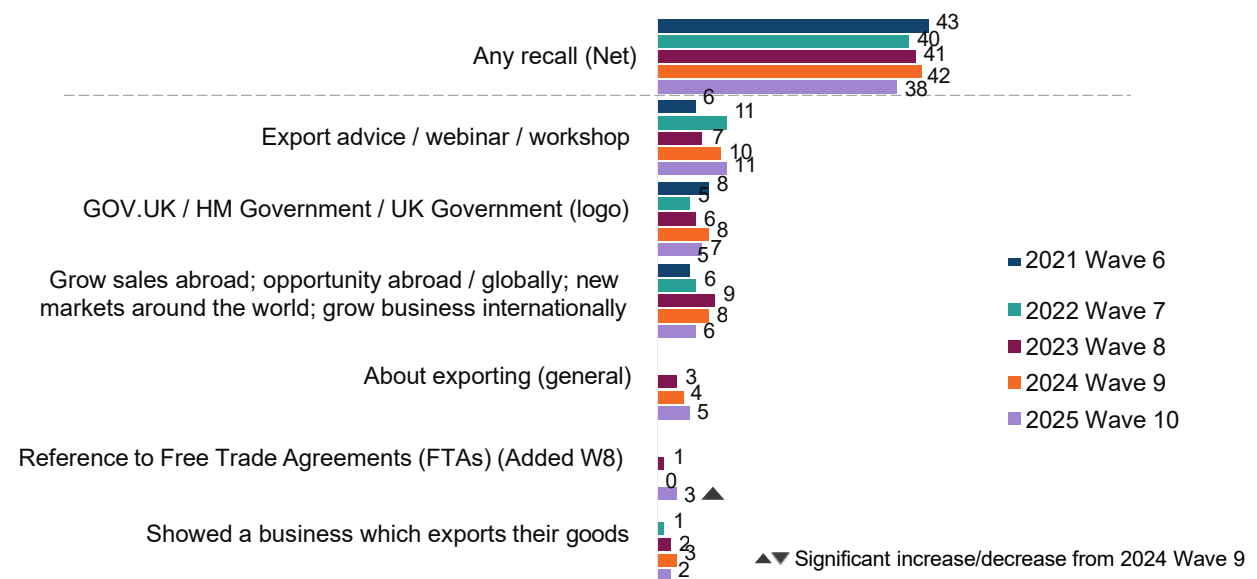


Source: AD4. Who do you think was responsible for the information or advertising you remember seeing?

Base: 2020 W5 / 2021 W6 / 2022 W7 / W8 2023 / 2024 W9 / 2025 W10: All aware of advertising or publicity: £500,000+ turnover (791 / 453 / 676 / 537 / 523 / 478)
Only showing responses given by at least 2% in 2025

In 2021, a new question was added to the survey to start tracking what businesses spontaneously recalled from the advertisements or information they had seen about exporting. In 2025, just under 2 in 5 (38%) businesses were able to recall something specific about the advert or publicity they had seen, in line with 2024 (Figure 11.4). Overall likelihood of recalling specifics about advertisements remained consistent from 2024 to 2025, with the exception of references to FTAs (3% in 2025 compared with less than 1% in 2024). Mentions of exports advice, webinars and workshops were the most mentioned element of advertising remembered, followed by mentions of GOV.UK.

Figure 11.4: Elements recalled of information or advertising about exporting (% of respondents who are aware of advertising/publicity)



Source: Q40_AD_SOURCE_B. Can you briefly describe any elements of the advertisements you have seen?

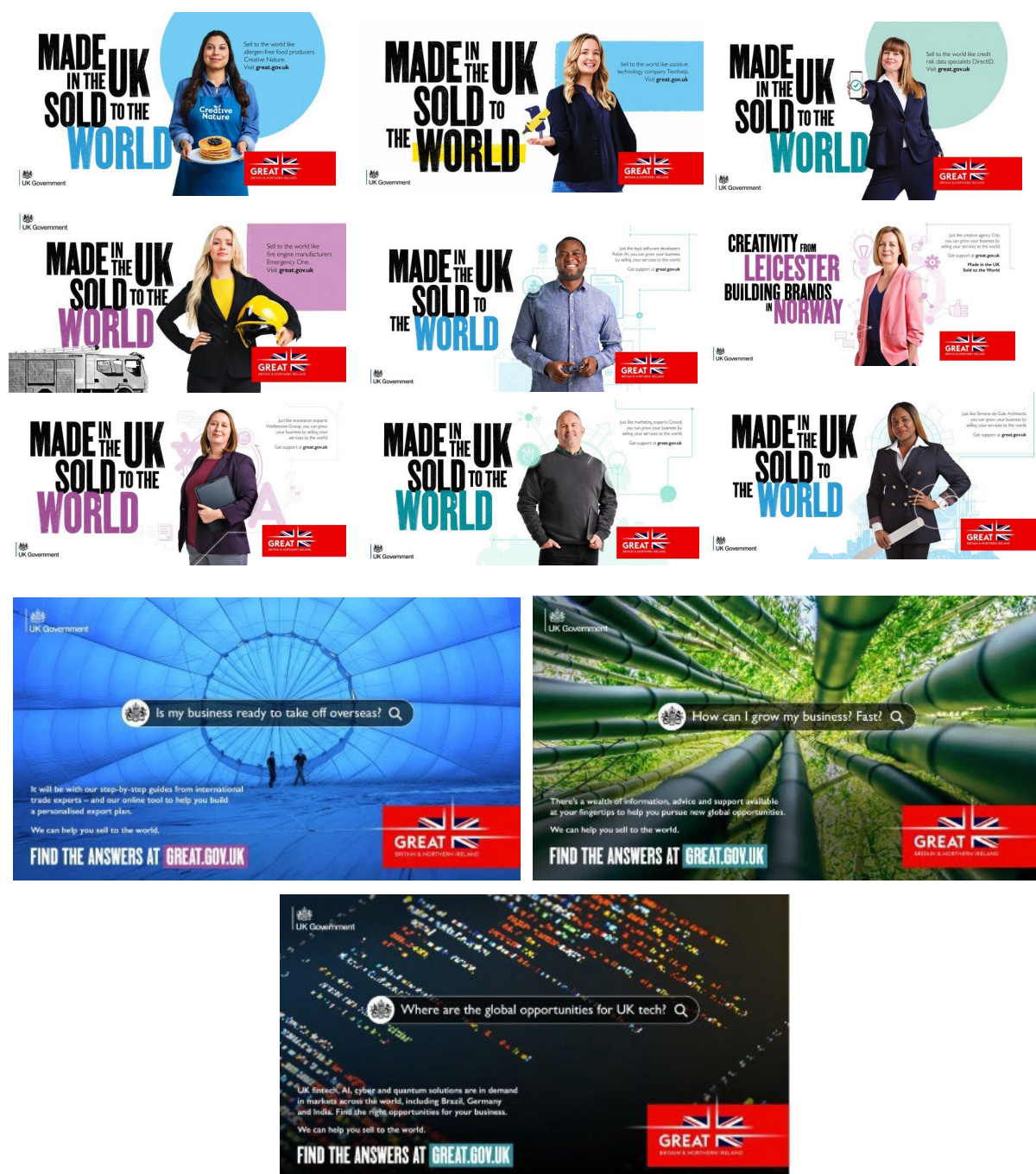
Base: 2021 W6 Q2-Q4 / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: All aware of advertising or publicity: £500,000+ turnover (318 / 676 / 537 / 524 / 478) *Q4 only in W6
Only showing responses given by at least 2% in 2025

11.2 ‘Made in the UK, Sold to the World’ campaign recognition

During the interview, all respondents were asked to navigate to a website to view the campaign materials – 45% of respondents agreed and were able to do this.⁴² From the ‘Made in the UK, Sold to the World’ campaign, respondents were shown a montage of ads from the campaign (Figure 11.5). After viewing, they were asked if it was something they had seen, or similar to something they had seen before.

⁴² There could be several reasons why a respondent was unable to access the website, including refusal, lack of computer access, internet issues etc.

Figure 11.5: 'Made in the UK, Sold to the World' ads shown in interview⁴³

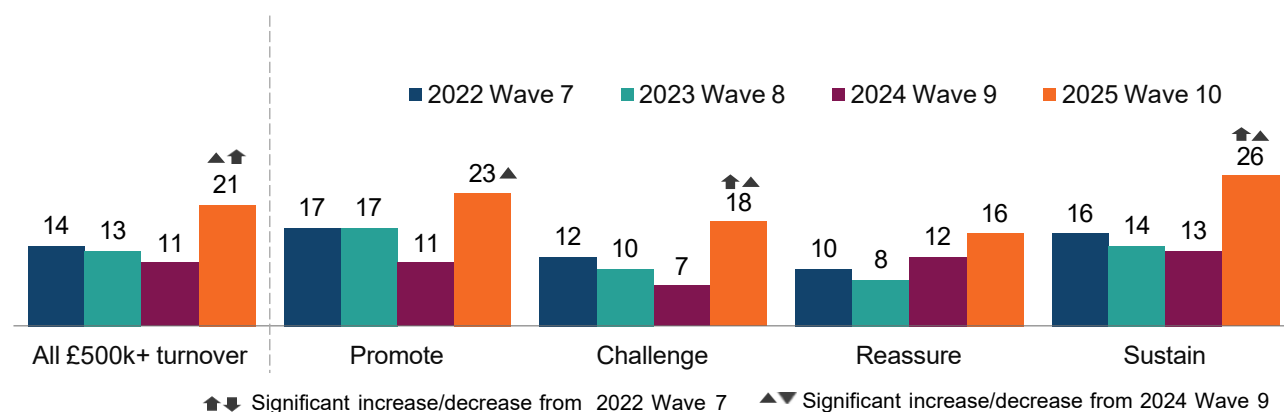


Overall, the campaign was recognised by 21% of those who were able to view the materials on the survey website, an increase from 11% in 2024 and 14% in 2022 (Figure 11.6).

Recognition of 'Made in the UK, Sold to the World' ads was higher for current exporters in the 'Sustain' segment (26%) than non-exporters in the 'Challenge' segment (18%). Recognition was lower amongst micro businesses (0 to 9 employees) compared to small/medium businesses (10 to 249 employees) (17% compared to 26%).

⁴³ These images, shown to survey respondents, were the latest available campaign materials during fieldwork.

Figure 11.6: Campaign recognition – ‘Made in the UK, Sold to the World’ (% of all respondents recognising ‘Made in the UK, Sold to the World’ advertisements)



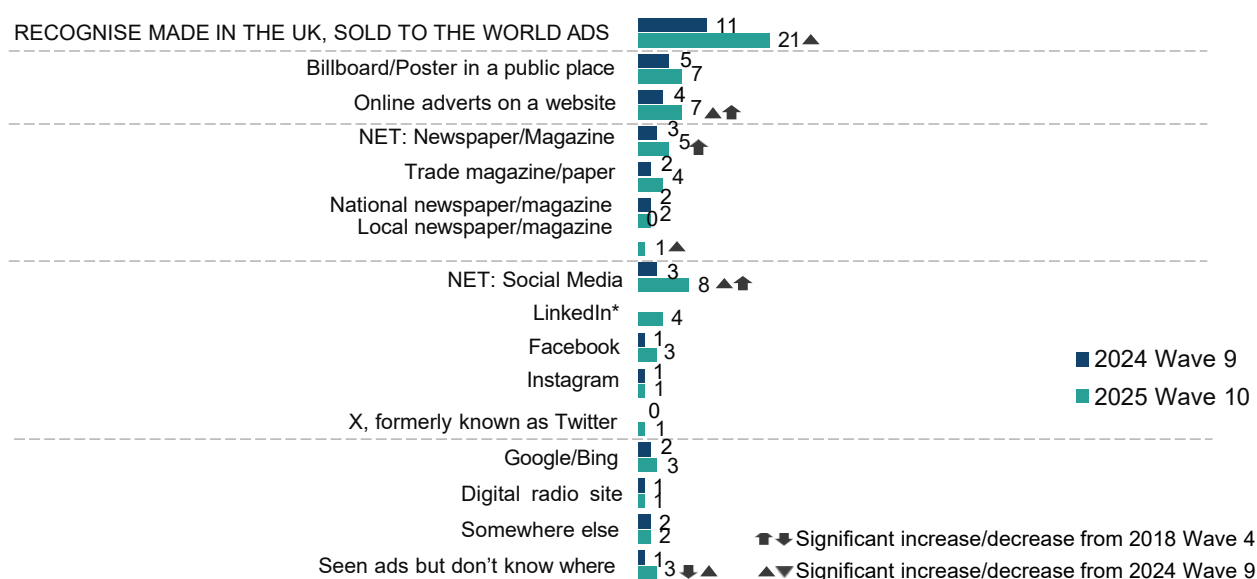
Source: AD7. This screen shows images from a range of adverts. Please scroll down and when you have seen all of the images, I'd like you to tell me whether you have seen any of these adverts, or adverts very similar to them, since October 2022.

Base: 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: All respondents who could access the website during the interview and could view at least one image: All £500,000+ turnover (1,373 / 1,292 / 1,037 / 950); Promote (199 / 214 / 195 / 161); Challenge (445 / 454 / 392 / 362); Reassure (113 / 95 / 63* / 69*); Sustain (604 / 520 / 381 / 355)

* Base size is below 100; treat with caution

Those who recognised the ‘Made in the UK, Sold to the World’ ads were asked where they had seen them. Just under 1 in 10 had seen them on social media (8%), an increase from 3% in 2024. Just under 1 in 15 (7%) had seen them on a billboard or poster or on a website. Recognition from online adverts on a website (7%) increased from 4% in 2024 (Figure 11.7). Among those who said they had seen any of the ads or adverts similar to them before, just under 2 in 5 (39%) had seen them on social media, 32% on a billboard or poster (down from 47% in 2024), 31% on a website and 25% in a newspaper or magazine.

Figure 11.7: Recognition and source of recognition of ‘Made in the UK, Sold to the World’ ads (% of all respondents recognising ‘Made in the UK, Sold to the World’ ads and where seen)



Source: AD7. This screen shows images from a range of adverts. Please scroll down and when you have seen all of the images, I'd like you to tell me whether you have seen any of these adverts, or adverts very similar to them, since October 2022. AD8. And where did you see those adverts? Were they on or in...

Base: 2024 W9 / 2025 W10: All respondents who could access the website during the interview and could view images of MIUK ads: All £500,000+ turnover (1,037 / 950). * New code added at W10.

11.3 UK Export Academy campaign and great.gov.uk help and support pages recognition

Figure 11.8 shows the images from the UK Export Academy campaign (UKEA) and the great.gov.uk help and support campaign that respondents were asked to view on the website during the interview.

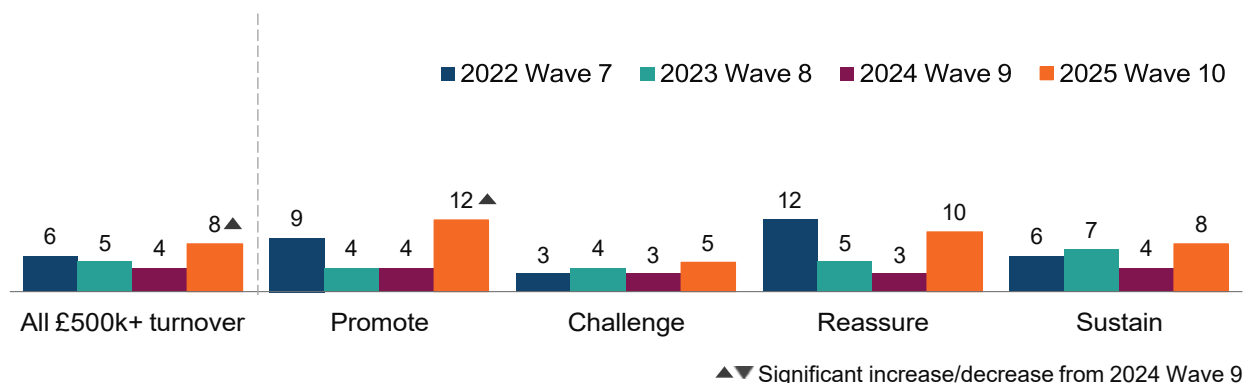
Figure 11.8: UKEA campaign ads shown in interview⁴⁴



Just under 1 in 10 (8%) of the respondents who could access the website and view the images recognised the UKEA ads (purple image and text, Figure 11.8), an increase compared to 2024 (4%; Figure 11.9). Those in the 'Promote' segment (12%) were more likely to recognise the ads than other segments, an increase from 4% in 2024.

⁴⁴ These images, shown to survey respondents, were the latest available campaign materials during fieldwork. They are no longer the current campaign materials at the time of writing this report.

Figure 11.9: Campaign recognition - UK Export Academy (% of all respondents recognising UK Export Academy)



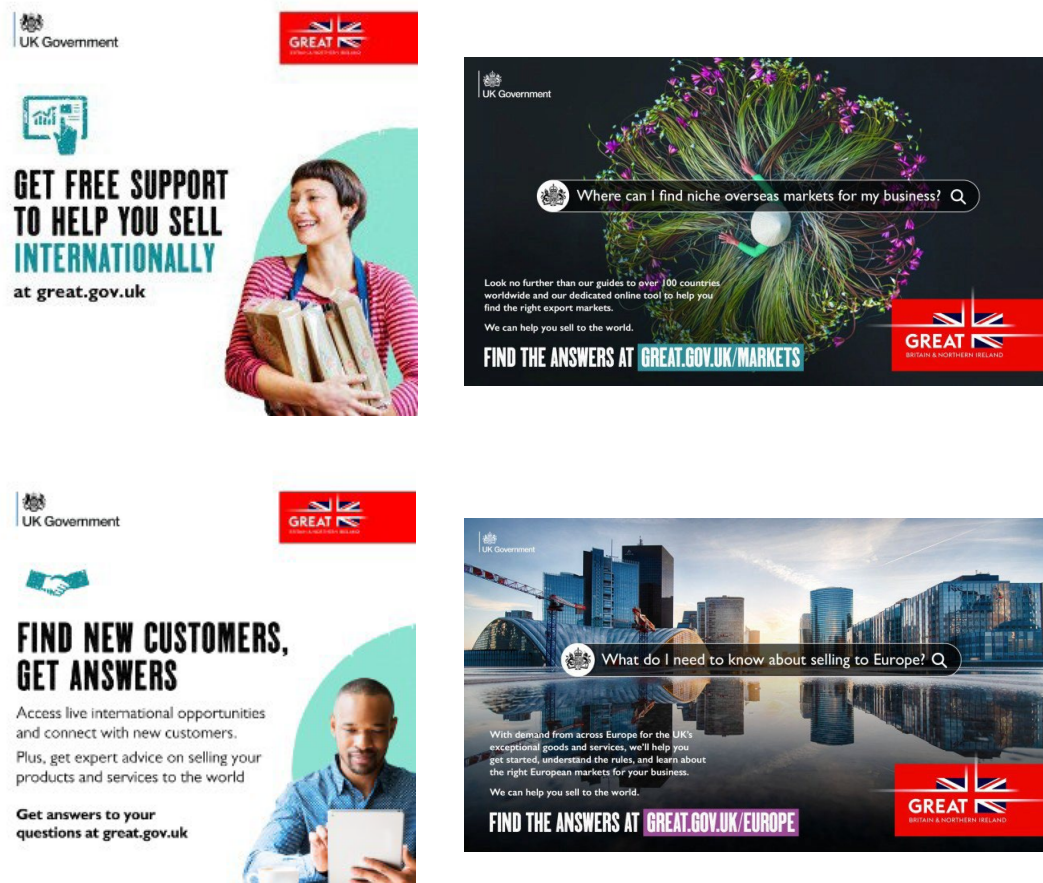
Source: AD6B. Before today had you seen any of these adverts on this screen before?

Base: 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: All respondents who could access the website during the interview and could view UKEA images: All £500,000+ turnover (1,376 / 1,281 / 1,020 / 937); Promote (201 / 212 / 192 / 161); Challenge (446 / 450 / 385 / 355); Reassure (113 / 95* / 62* / 68*); Sustain (604 / 515 / 375 / 350)

* Base size is below 100; treat with caution

In 2025, a separate page of ads relating to the great.gov.uk help and support pages were introduced (Figure 11.10). Less than 1 in 10 (8%) recognised the great.gov.uk help and support ads, similar to the UKEA campaign.

Figure 11.10: great.gov.uk help and support campaign ads shown in interview



11.4 DBT campaign effectiveness

After viewing the DBT materials from the 'Made in the UK, Sold to the World' campaign, those able to view the ads⁴⁵ were asked a series of questions designed to assess the effectiveness of the advertising activity. These questions were asked after viewing the MIUK materials only, so respondents were only considering the MIUK campaign.⁴⁶

Around a quarter (24%) of those able to view the campaign materials said that they had increased their interest in finding out more about exporting. This is in line with the 'Exporting is GREAT' campaign in 2018 (27%). Among all of those who viewed the campaign materials, those in the 'Sustain' (31%) segment were more likely than those in the 'Challenge' (16%) segment to state that the 2025 DBT materials increased their interest in finding out more about exporting. Businesses in London were the most likely region in the country to state the materials had increased their interest (34% in London, compared to 24% as a net average across Great Britain).

Further questions went on to evaluate the campaigns in terms of their ability to stand out, the way in which the information was conveyed (whether it was clear, relevant, new or trustworthy), communication of messages specific to the campaigns, and whether they prompted respondents to consider exploring exporting options (Figure 11.11).

- Just under half (46%) agreed that the advertising stood out from other advertising, making it more impactful than the 'Exporting is GREAT' campaign in 2018 (37%). However, this is a decrease from 2022, where 55% of business felt the advertising stood out.
- Information conveyed in the adverts was seen to be clear and easy to understand (75%), a decrease from 84% in 2022.
- Over two-thirds (69%) of businesses agreed they trust the information given. This was unchanged since 2024 (69%) following a decrease from 76% in 2022, and in line with as for the 'Exporting is GREAT' campaign in 2018 (66%).
- Just over 2 in 5 (42%) agreed that the adverts told them something new. This is a slight increase, though not significantly so, from 37% in 2024, though remains below 2022 levels (62%).
- Almost 3 in 10 (29%) respondents felt the campaigns were relevant to them, an increase compared to 2022 (24%) and in line with the 2018 'Exporting is GREAT' campaign (29%). In 2025, agreement that the campaigns were relevant varied by segment – it was highest for 'Sustain' (exported in the past 12 months, 44%) followed by 'Promote' (haven't exported but has a suitable product, 36%) and 'Reassure' (exported more than 12 months ago, 27%), with agreement among the 'Challenge' segment (without an exportable product) much lower (13%).

While there was little difference between the segments in terms of how clear they found the ads to be and whether they felt the ads told them something new, those in the 'Reassure' segment were more likely to say that they could trust the information given by the adverts (79%) than those in the 'Challenge' (65%) segment.

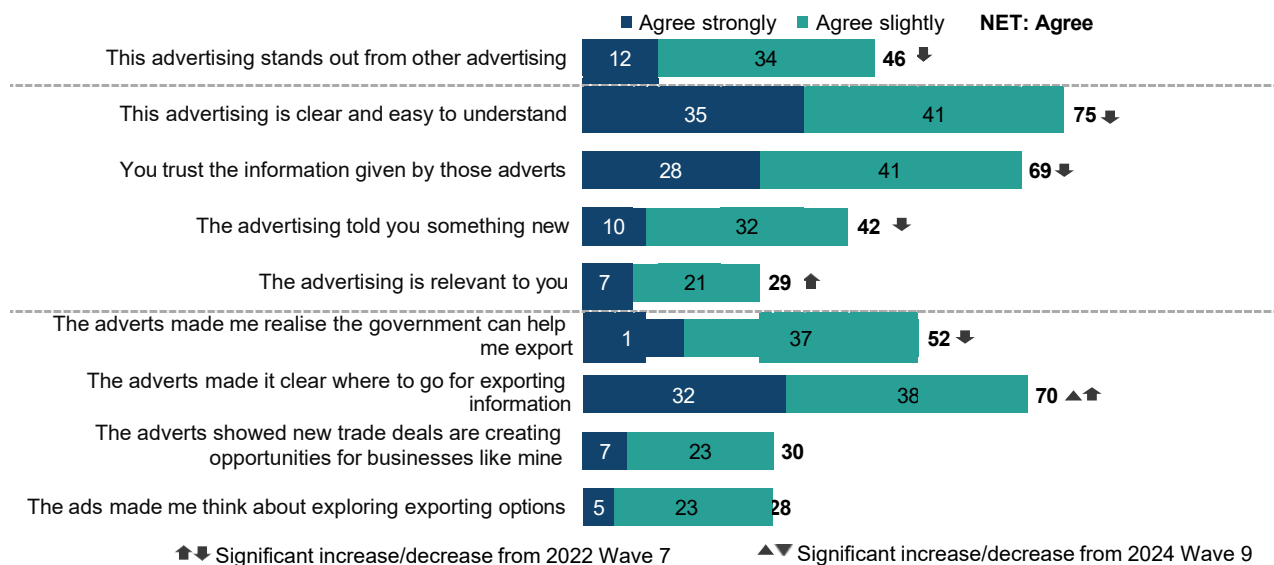
⁴⁵ The vast majority of those able to access the website and view at least one screen of campaign materials were able to view all of them.

⁴⁶ In Q2-Q4 of W8 and all quarters of wave 9 and wave 10, these questions were asked after viewing only the MIUK campaign.

In relation to specific campaign messages, 70% agreed that the ads made clear where to go for exporting information, an increase from 57% in 2024 and 60% in 2022. Around half agreed the ads made them realise the government can help them export (52%) and less than a third (30%) agreed the ads showed that new trade deals were creating opportunities for businesses like theirs.

The ads prompted just over one quarter (28%) of respondents to think about exploring exporting options. In 2025, agreement was higher among those in the 'Sustain' (36%) and 'Promote' (34%) segments, compared to those in the 'Challenge' (19%) segment.

Figure 11.11: Response to DBT campaigns (% of respondents who could view the ads)



Source: AD12. Thinking about these adverts, please tell me to what extent you agree or disagree with each of the following statements.

Base: 2025 W10: All respondents who could access the website during the interview and could view at least one image: £500,000+ turnover (950)

11.5 Overall impact of campaign materials

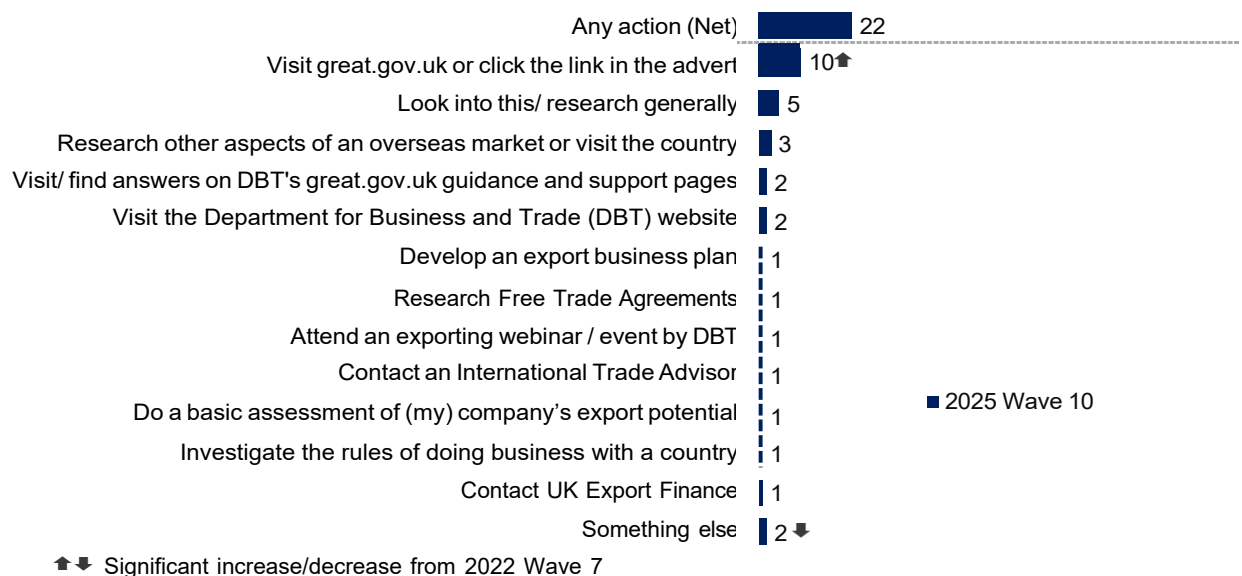
Those who had seen the campaign materials prior to interview were additionally asked if they had done anything, planned to do anything, or would consider doing anything having seen the ads. Among those who recognised the ads (i.e. reported having seen them prior to the interview), just under 1 in 10 (8%) had already taken some action. This is a decrease, though not significantly so, from 14% in 2024. In addition, 16% said there were actions that they planned to take or would consider taking (13% in 2024). By comparison, 17% of those who recognised the 2018 'Exporting is GREAT' campaign had already taken some action as a result of seeing that campaign. However, as the 'Exporting is GREAT' campaign had been running for a number of years it is possible that these were actions that had been taken over a longer period of time. It is also likely that businesses were more actively open to taking actions at that time, in preparation for the UK's exit from the EU.

Still among those who recognised the ads, specific actions already taken as a consequence of seeing the 2025 DBT campaigns were visiting the great.gov.uk website (1%, 3% in 2024), developing an export business plan (1%, 0% in 2024) and visiting or finding answers on the DBT website (1%, unchanged from 2024).

Combining actions already taken with those planned or considered, 22% of those who recognised the ads had either taken some action, planned to, or would consider doing so in

future (Figure 11.12). The main action either taken, planned, or considered was visiting the great.gov.uk website (10%), with all other actions at or below 5%. This suggests that the campaigns are reasonably successful at prompting businesses to act if they are aware of them. However, overall awareness remains relatively low (21% MIUK, 8% UKEA), though this is an increase from 2024 (11% MIUK, 4% UKEA); DBT should aim to continue to increase overall awareness and recognition of campaigns and ensure clear signposting and calls to action to encourage more businesses to explore exporting.

Figure 11.12: Action taken, planned to take or will consider taken as a result of seeing ads (% of respondents who recognised ads)



Source: AD13A. What, if anything, have you done as a result of seeing or hearing these adverts? AD13B. And is there anything else that you plan to do, or will consider doing, as a result of seeing or hearing these adverts?

Base: 2025 W10: All respondents who recognised at least one of the ads: All £500,000+ turnover (198)

There were no differences in the impact of the campaigns on actions taken, planned or considered between those who recognised only the 'Made in the UK, Sold to the World' campaign or the UK Export Academy (UKEA) campaign adverts, and those who recognised both 'Made in the UK, Sold to the World' and UKEA campaigns.

12. Findings within the total registered business population

The preceding chapters in this report have focused on businesses with an annual turnover of £500,000 or more. This chapter will focus on findings relating to the total population of surveyed businesses, which also includes those with a turnover below £500,000.

The majority of the total registered business population is made up of small and micro businesses, and the data explored in this chapter are strongly influenced by these. In the total sample, £500,000+ turnover businesses were oversampled relative to their true proportion in the wider population, reflecting DBT's focus on high export potential businesses. This allowed for more robust sub-group analysis when examining the £500,000+ businesses, which were the primary focus of this report. However, as a caveat to this section, this sampling approach has limited the analysis of the total sample of all businesses. The weighting scheme required to compensate for the smaller proportion of lower turnover businesses resulted in a lower effective base size and larger margins of error around the all-business estimates.

Overall, results within the total registered business population align with those observed among businesses with a turnover of £500,000 or more. Differences between the two populations are highlighted where relevant throughout this chapter and generally reflect the inclusion of smaller businesses in the total sample.

Key findings

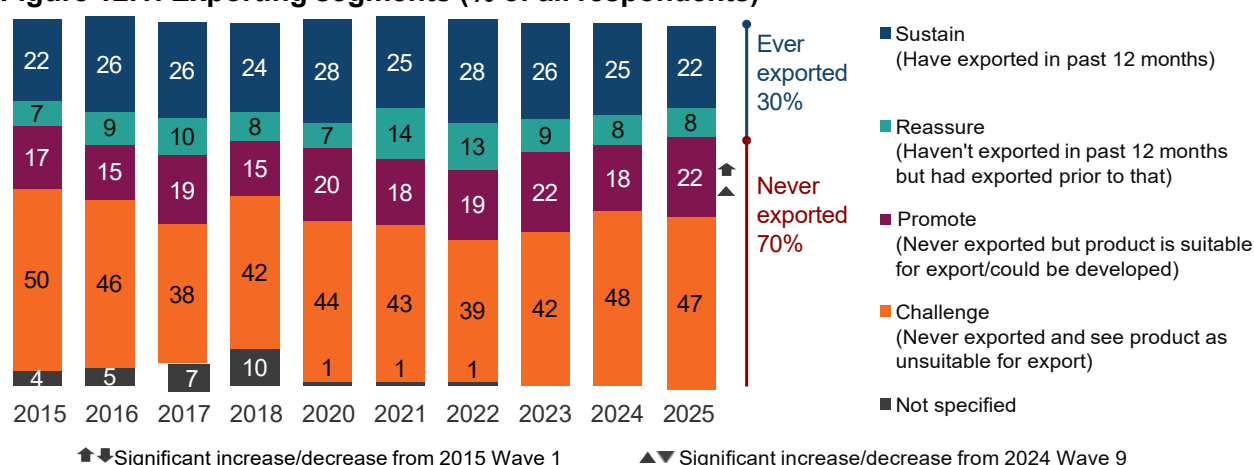
- Just under a third of businesses (30%) in 2025 reported having ever exported, consistent with 2024 (33%) though continuing a decline from a peak of 41% in 2022 and returning to levels seen between 2015 and 2018 (29% to 33%).
- Just over 3 in 4 (78%) businesses who have or could export had heard of FTAs, though just 1 in 4 (25%) reported any knowledge about them. Despite limited self-reported knowledge, almost half (48%) agreed that FTAs will benefit their business.
- Just over half (54%) of businesses reported having adequate supply chains to export, a decrease from 66% in 2024. Around 1 in 10 (12%) businesses stated that they were currently experiencing supply chain issues, a decrease from 17% in 2024. Among these, supply chain issues were attributed to the UK's exit from the EU (61%), general economic or inflationary pressure (58%) or the cost of shipping (51%), all consistent with 2024. Over 4 in 10 (45%) attributed current supply chain issues to the rising costs of tariffs. Of those that had faced issues that were now resolved, 43% reported they had to wait until matters resolved themselves, while 34% were able to use alternative suppliers.
- Of businesses that believed their product and services can be exported, less than 2 in 10 (14%) reported a high knowledge of how to export, a decrease from 19% in 2024. Almost 4 in 10 (37%) stated that they had poor or no knowledge of how to export, which was similar to 2024 (33%).
- In the total business population, 3 in 10 (31%) of businesses had growth as an integral part of their business plans, a decrease from 38% in 2024, whilst one-quarter (24%) intended to grow their business but had no concrete plans on how to do this. A further 32% were aiming to consolidate instead, an increase from 25% in 2024, and 13% were aiming to return to profitability first.

- Two in 10 (19%) businesses believed UK exports would increase over the next 12 months, continuing a year on year decline from 31% in 2023 and 22% in 2024.
- One in 5 (21%) said they had seen any advertising, publicity, or other information to make them think about exporting in the last year or so. Respondents were then shown images from the 'Made in the UK, Sold to the World' campaign. Of those who could view these images, 25% agreed that it was relevant to them, while 74% disagreed. Overall, when asked whether the adverts shown increased their interest in finding out more about exporting, 1 in 5 (22%) responded yes, whilst 3 in 4 (76%) responded no.

12.1 Exporting behaviours

Just under a third of all businesses said they had ever exported (30%), consistent with 2024 (33%) though this showed a continuing decline from a peak of 41% in 2022, and returning to levels seen between 2015 and 2018 (29% to 32%). These proportions are similar to businesses with a turnover of £500,000 or more with 35% having ever exported, although a slightly higher proportion of the £500,000 or more group fell into the 'Sustain'⁴⁷ segment (29% compared with 22%). The proportion of businesses who had never exported continued to trend upwards (70%, compared with 67% in 2024), and higher than in any previous wave. In 2025, less than 1% fell into the 'unallocated' category, consistent with 2024.

Figure 12.1: Exporting segments (% of all respondents)



Source: Composite measure merging data from several variables

Base: All respondents: 2015 W1 / 2016 W2 / 2017 W3 / 2018 W4 / 2020 W5 / 2021 W6 / 2022 W7 / 2023 W8 / 2024 W9 / 2025 W10: Total (1,405 / 1,418 / 2,991 / 3,000 / 3,001 / 3,002 / 3,001 / 3,004 / 2,969 / 2,894)

As a proportion of all businesses, 9% stated that they had exported only goods in the last 12 months. This was higher among businesses with a turnover of £500,000 and above (16%) compared with of businesses with a turnover below £500,000 (10%). One in 10 (11%) had exported only services. Conversely to those exporting only goods, the proportion of businesses who had only exported services was higher among those below £500,000 (17%) compared to businesses £500,000 and above (11%). Overall, only a minority (2%) had exported both goods and services. However, this was higher among businesses £500,000 and above (5%) compared with businesses below £500,000 (3%).

⁴⁷ See section 3.5 'Segment Definitions' for a full explanation.

Those businesses that had exported goods in the past 12 months (excluding exports to Republic of Ireland) were more likely to report a reduction in exports in the last year (30%) than an increase (22%). Among those exporting services (excluding exports to Republic of Ireland), 20% stated they had increased and 24% decreased.

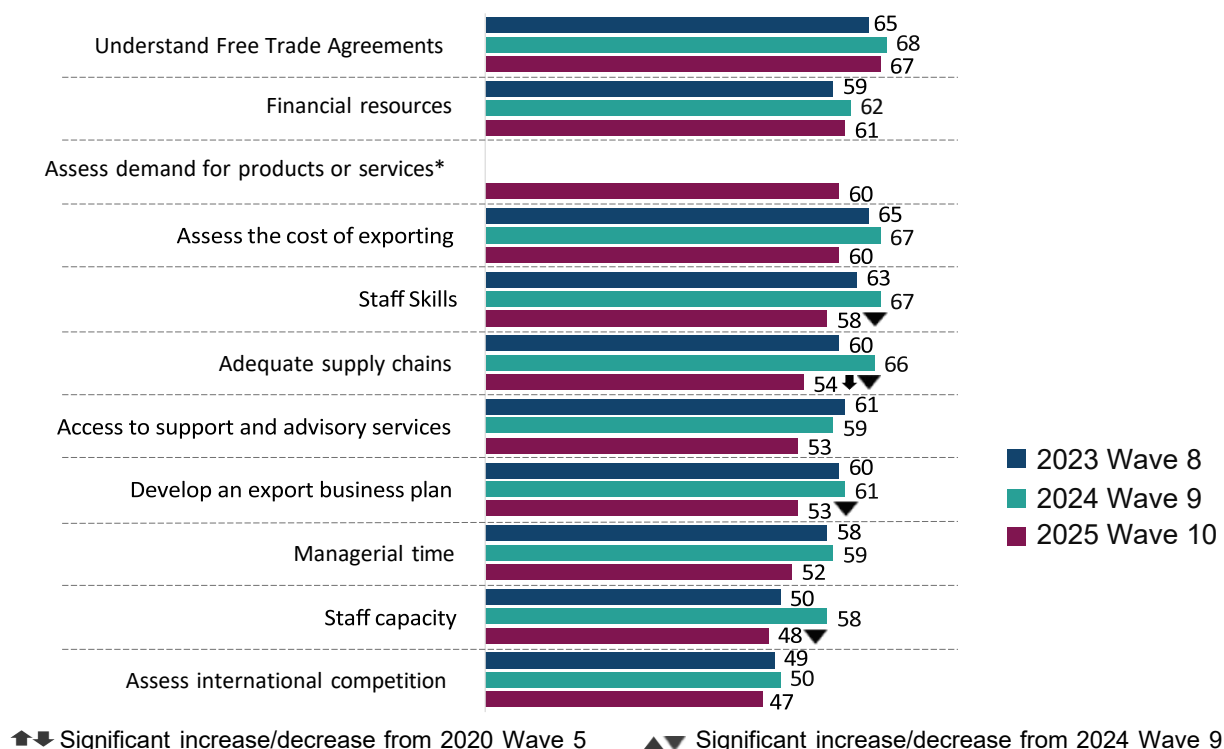
Among businesses that had never exported, just over two-thirds (68%) believed that their products or services would never be suitable for export, a decrease from 73% in 2024 and returning to 2022 levels (68%). One third (32%) believed their products or services could potentially be developed for export, an increase from 27% in 2024.

One in 5 exporters (21%) reported taking an active approach to exporting, intentionally targeting customers in specific countries, a slight but not significant increase from 2024 (17%). This was in line with what was observed in the £500,000+ group where 23% reported taking an active approach, a slight but not significant increase from 19% in 2024. Within the total business population, 78% reported a more passive approach (responding to orders from abroad when received, but not specifically targeting customers in other countries), a slight but not significant decrease from 81% in 2024.

12.2 Barriers to exporting

Among all businesses (excluding those that could never export), there were decreases in reported capabilities and capacities for exporting between 2024 and 2025. Specifically, reported adequate supply chains (54%), staff skills (58%), staff capacity (48%) and capability to develop an export business plan (53%) decreased between 2024 and 2025. Reported managerial time (52%) and capability to assess the cost of exporting (60%) were also lower than in 2024 though were not statistically significant changes (Figure 12.2). This is converse to the trends observed among businesses with a turnover of £500,000 or more, which in 2025 saw small but not significant increases in some capabilities, continuing a recent year on year trend. For example, staff capacity (65% compared with 63% in 2024, 52% in 2023) and managerial time (64% compared with 61% in 2024, 56% in 2023).

Figure 12.2: Whether businesses have enough capacity and capability to focus on exporting (% saying 'yes')



Source: Q31a - Thinking about your business' ability to start or continue exporting internationally, would you say that your business has enough of each of the following to focus on exporting.

Base: All businesses whose product is suitable for export: **2023 W8 / **2024 W9 / **2025 W10: Total (1,813 / 1,921 / 1,885 / 888 / 834 / 799)

*New code at Wave 10. **W8 / W9 and W10 half sample.

Respondents that had either exported to a core market, or had considered doing so but decided against it, were asked about barriers they faced when exporting goods or services to these markets. The following options were read out and the proportions citing each as a strong barrier were:

Goods

- Barriers to product or production processes: 13%, unchanged from 15% in 2023
- Barriers related to customs procedures: 57%, though not a statistically significant change compared with 2023 (53%), continuing an increase from previous years (25% in 2021, 23% in 2018)
- Barriers related to business conditions abroad: 15%, a decrease from 22% in 2023, returning to 2021 levels (14%)

Services

- Barriers related to administrative costs, burdens and regulations abroad: 21%, a decrease from 30% in 2023
- Barriers related to conditions for the supply of services abroad: 17%, a decrease from 27% in 2023

- Barriers related to the different treatment of domestic and foreign businesses: 15%, suggesting a decrease, though not a statistically significant change, compared with 22% in 2023

12.3 Free Trade Agreements (FTAs)

Among all respondents who have ever exported or whose products could be developed for export, 78% had heard of FTAs, though just 25% stated they have any knowledge about them, consistent with 81% and 23% respectively among businesses with £500,000 turnover or more.

Overall, almost half (48%) of businesses who have ever exported said their exports were eligible for benefits related to FTAs. Most commonly, these were the ability to easily transfer data between countries (22%) and reduced customs duties (21%). The proportion of businesses with £500,000 turnover or more that said their exports were eligible for any benefits was similar (52%), though they were slightly more likely to say their exports were eligible for reduced customs duties (28%).

Among all respondents who have ever exported or whose products could be developed for export, just over half (53%) agreed that FTAs between the UK and other countries will benefit their business, while 19% disagreed. Three in 10 (30%) agreed that they are confident they would know how to trade through an FTA and 22% agreed that the government is providing information and support to help businesses access the benefits of FTAs (45% and 37% disagreed with these statements, respectively).

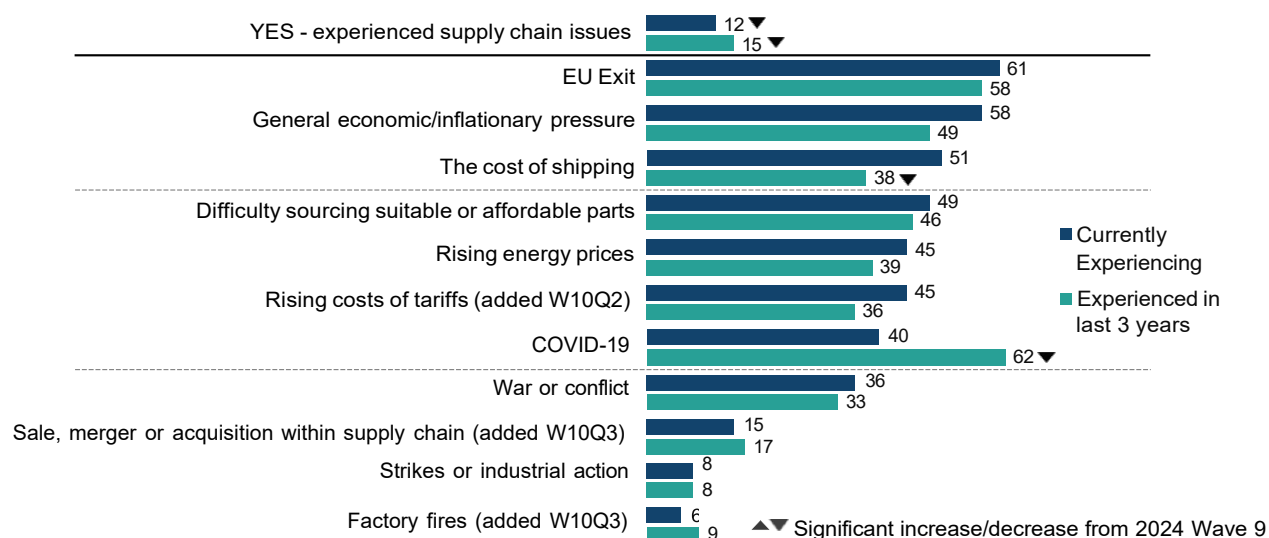
To find information and support on FTAs, respondents most commonly reported that they would refer to GOV.UK (65%), business or professional contacts (53%), or the UK government (general mentions), including DBT (50%).

12.4 Supply chains

In 2025, just over half (54%) reported adequate supply chains to start or continue exporting. This is a significant decrease from 2024 (66%) and lower than in 2020 when first asked (63%). Among all businesses, 37% had any experience of supply chain issues, with 12% reporting they were currently experiencing these, both of which decreased since 2024 (44% and 17%, respectively). Less than 2 in 10 (15%) reported they had experienced supply chain issues within the last three years but were now resolved, a continued decrease from 22% in 2024 and 26% in 2023. Findings are broadly consistent with businesses with £500,000 turnover or more, among whom 49% had any experience of supply chain issues (down from 53% in 2024) and 17% were currently experiencing these, unchanged from 19% in 2024.

As shown in Figure 12.3, among those currently experiencing supply chain issues, around 6 in 10 attributed this to the UK's exit from the EU (61%) or general economic or inflationary pressure (58%), and half (51%) to the cost of shipping, all consistent with 2024. Over 4 in 10 (45%) attributed current supply chain issues to the rising costs of tariffs (added in wave 10, quarter 2) or to COVID-19 (40%). Among businesses reporting supply chain issues that were now resolved, 43% reported they had to wait until matters resolved themselves, while 34% were able to use alternative suppliers.

Figure 12.3: Experience of and cause of supply chain issues (% of respondents experiencing / experienced supply chain issues within last 3 years)



Source: SCHAIN2. Which of the following do you feel caused the supply chain issues you are currently experiencing/experienced within the last 3 years but now resolved?

Base: All respondents who are currently experiencing supply chain issues, All respondents who have experienced supply chain issues within the last 3 years but which have now been resolved. Total 2025 W10 (459 / 561)

12.5 Knowledge, information and support

Of businesses that believed their product and services could be exported, less than 2 in 10 (14%) reported a high knowledge of how to export, a decrease from 19% in 2024. Almost 4 in 10 (37%) stated that they had poor or no knowledge of how to export, which was similar to 2024 (33%). Businesses with a turnover of £500,000 and above were more likely to report high knowledge of how to export (19%) compared with businesses below £500,000 (13%).

One quarter (24%) of businesses reported a high level of knowledge of where to go for information about exporting, unchanged from 2024 (25%) and with no difference by business turnover (23% of businesses below £500,000, 25% of businesses £500,000 and above). A similar proportion reported poor or no knowledge of where to go for information (23%), unchanged from 2024 (24%). This was higher among businesses below £500,000 (24%) compared with 18% of businesses £500,000 and above.

Similarly, the proportion of all businesses reporting a high level of knowledge of where to go for help and support with exporting was unchanged in 2025 (21%) compared to 2024 (23%) and with no difference by business turnover (21% of businesses below £500,000, 24% of businesses £500,000 and above). A similar proportion reported poor or no knowledge (25%) unchanged from 24% in 2024, with businesses below £500,000 more likely to report poor or no knowledge (27%) compared with 20% of businesses £500,000 and above.

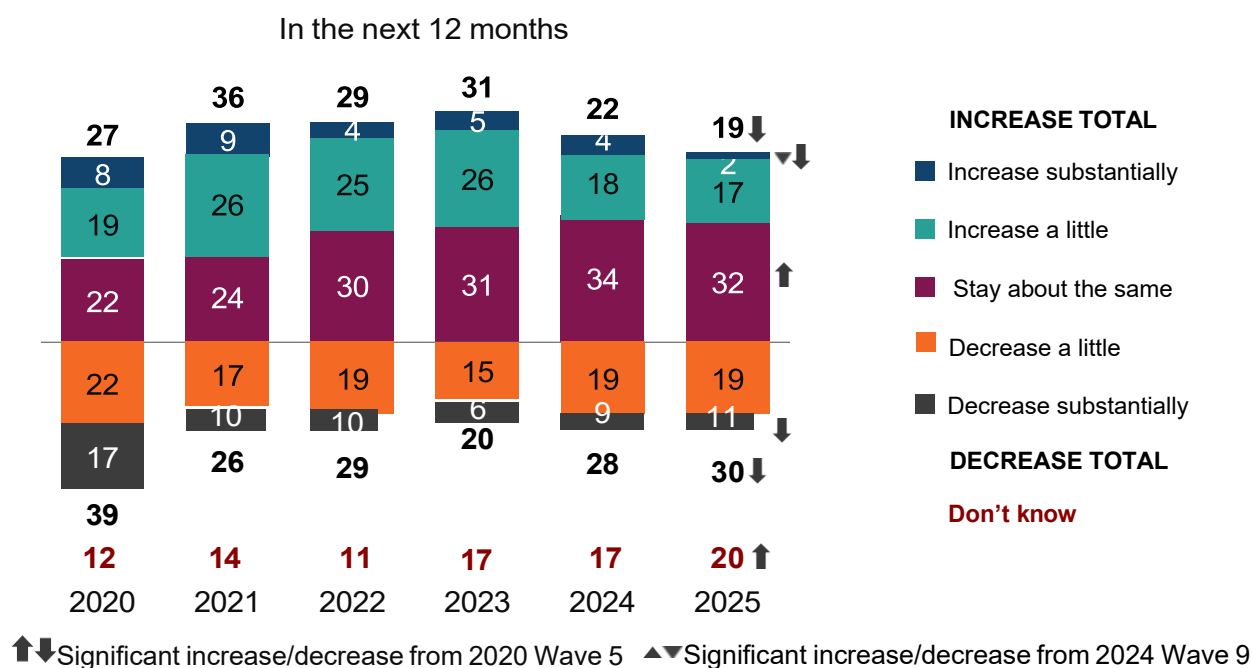
Of those businesses who have exported or could potentially export, 30% said they had ever sought advice or support with exporting, a decrease since 2024 (35%), though there has been very little year-on-year change since 2015, with figures ranging between 28% and 35%.

12.6 Expectations for growth and trade

In the total business population, 31% of all businesses had growth as an integral part of their business, a decrease from 38% in 2024 (28% of businesses below £500,000, 39% of businesses £500,000 and above), whilst 24% intended to grow their business but had no concrete plans how to do this (unchanged from 22% in 2024). Rather than growing the business, a further 32% were aiming to consolidate instead, an increase from 25% in 2024 (34% of businesses below £500,000, 26% of businesses £500,000 and above), and another 13% were aiming to return to profitability first.

Overall, 19% of all businesses thought the total UK export value will increase over the next 12 months. While not a significant change, this continues a decline seen since 2023 (31%) and 2024 (22%) (see Figure 12.4). Correspondingly, the proportion of businesses who thought the total export value will decrease did not significantly change but was higher in 2025 (30%) compared with 2024 (28%) and 2023 (20%), though remained lower than 2020 (39%).

Figure 12.4: Whether businesses believe UK exports will increase or decrease in the next 12 months (% of all respondents)



Source: Q40b Thinking about UK exports over the next 12 months or so, do you think that the total value of exports by UK businesses will...

Base: All respondents 2020 W5 / 2021 W6 / 2022 W7* / 2023 W8* / 2024 W9* / 2025 W10*: Total (3,001 / 3,002 / 1,497 / 1,514 / 1,487 / 1,449)

*W7/W8/W9/W10 asked of random half sample

When cross-referenced with other exporting attitudes metrics, businesses were less optimistic about levels of demand. Agreement that there is a lot of demand for UK goods or services around the world decreased in 2025 (57% from 65% in 2024), returning to levels seen in recent years (59% in 2021, 53% in 2022 and 50% in 2023). This indicates a reversal in expectations of demand compared with 2024, and remains below 2018 when a peak figure of 73% was recorded.

All other statements exploring attitudes to exporting were unchanged compared with 2024, though suggest mixed views. Of businesses that do export or could export, over a third

(35%) felt there would not be enough demand for their business overseas to make exporting worthwhile, similar to 2024 (37%). However, over half (55%) felt that there is a lot of opportunity for their business to grow internationally. Though not a significant change compared with 2024 (52%), this reflects a year-on-year incremental increase since 2023 (50%).

There are also indications that some businesses may be looking beyond exporting to facilitate growth. Just under half (49%) agreed that there are enough opportunities for growth within the UK to mean their business is not interested in exports (48% in 2024). Just over 2 in 5 (43%) of businesses felt that there are too many risks in taking a business international, a slight though not a significant increase from 2022 to 2024 inclusive (all 40%), and only 1 in 5 agreed there is a lot of support available to help small and medium businesses start or continue exporting (22%).

12.7 Advertising and Campaign metrics

One in 5 (21%) of all businesses said they had seen any advertising, publicity or other information to make them think about exporting. Though no change from 2024 (21%), there has been a year-on-year decline from 36% in 2021. These findings are in line with trends among businesses with a turnover of £500,000 or more. Recognition of any DBT campaign ('Made in the UK, Sold to the World' / UK Export Academy / great.gov.uk help and support services) was at 22%, an increase from 14% in 2024. Recognition of the 'Made in the UK, Sold to the World' adverts was 7% (10% in 2024). Recognition of adverts relating to the UK Export Academy was 8%, an increase from 4% in 2024, and great.gov.uk help and support services was 5% (unchanged from 3% in 2024).

When businesses were asked where they had seen any advertising or information, 7% of all businesses were aware of internet advertising, 4% for radio, 4% for TV, 2% for social media and 2% for print, all consistent with 2024.

Seven in 10 (70%) businesses reported that the government was responsible for this advertising (unchanged from 71% in 2024), with the UK government more generally (53%) being the most prominent response (unchanged from 54% in 2024). Recognition of the Department for Business and Trade (or Department for International Trade (DIT)) was 16% (unchanged from 14% in 2024), whilst all other sources were 2% or below. Of the businesses that were aware of information or advertising, very few businesses were able to recall details or elements from the advertising that they have seen. One in 10 (10%) recalled the advertising mentioning 'export advice/webinar/workshop' support (unchanged from 10% in 2024). Fewer than 1 in 10 mentioned responses relating to GOV.UK / HM Government / UK government logo (7%) or growing sales/opportunities abroad (6%). Awareness of any other elements from advertising were at 3% or below.

As described in section 11.5, after viewing the DBT materials from the 'Made in the UK, Sold to the World', those able to view the MIUK ads⁴⁸ were asked a series of questions designed to assess the effectiveness of the advertising activity. These questions were asked after viewing the MIUK materials only, so respondents were only considering the MIUK campaign and not the UK Export Academy or great.gov.uk help and support services.

⁴⁸ The vast majority of those able to access the website and view one screen of campaign materials were able to view all of them.

One in 5 (22%) of those able to view the campaign materials said that they had increased their interest in finding out more about exporting, consistent with 2024 (25%).

There was mixed evidence of shifts in attitudes towards the advertising in 2025 compared with 2024:

- One in 4 (25%) agreed that the advertising was relevant to them, while 77% disagreed, representing a negative shift from 29% who agreed and 69% who disagreed in 2024.
- Four in 10 (43%) agreed that the advertising told them something new, compared with 53% who said that it did not, consistent with 42% who agreed and 56% who disagreed in 2024.
- Seven in 10 (71%) agreed that the adverts made it clear where to go for exporting information, compared with 27% who disagreed, representing a positive shift from 53% who agreed and 46% who disagreed in 2024.
- Almost two-thirds (65%) said that they trusted the information in the adverts, compared with 29% that did not, unchanged from 2024 (65% and 30%, respectively).
- Just over half (54%) agreed that the adverts made them realise the government can help them to export, compared with 42% that did not, representing a positive shift from 2024 when 46% agreed and 50% disagreed.
- One in 3 (30%) agreed that the adverts showed that new trade deals are creating opportunities for businesses like theirs, compared with 67% that disagreed, consistent with 2024 when 30% agreed and 66% disagreed.
- Overall, when asked whether the adverts shown increased their interest in exploring exporting options or finding out more about exporting, 22% responded yes, unchanged from 25% in 2024, whilst 76% responded no, unchanged from 74% in 2024. Almost 3 in 10 (28%) stated that the adverts had made them think about exploring export options, unchanged from 25% in 2024 but continuing a year-on-year increase from 23% in 2023.

All businesses (excluding those that could never export) were asked about their awareness of government export support services. Of this group, 73% were aware of any support service, an increase from 66% in 2024. Just under half (47%) said they were aware of GOV.UK tools such as 'Check how to export goods' or 'Check duties and customs procedures for exporting goods', unchanged from 46% in 2024. A new code added in Q2 asked awareness of Business.gov.uk, of which 39% were aware, though this should be interpreted with caution as the site had not formally been publicised until after fieldwork was underway, and recognition was likely over-reported. There was also some awareness of GOV.UK services 'report a trade barrier' or 'check international trade barriers'⁴⁹ (26%), International Trade Advisors (26%) and UK Export Finance (20%). Less than 2 in 10 were aware of the Export Support Service and/or 'Ask the export support team a question' on GOV.UK (19%), Help to Grow (17%), great.gov.uk (16%), UK export licensing system (LITE and SPIRE) (15%), and the Import case management system (ICMS), or the service to apply for an import licence or export certificate (13%).⁴⁹

⁴⁹ New items introduced into the 2024 wave 9 survey were GOV.UK services 'report a trade barrier' or 'check international trade barriers', Help to Grow, great.gov.uk, UK export licensing system (LITE and SPIRE), and the Import case management system (ICMS), or the service to apply for an import licence or export certificate

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