



Llywodraeth Cymru
Welsh Government

STATISTICS

Analysis of Wales' exporting behaviours of Small Medium Enterprises: Autumn 2020

This article details the results from a survey conducted by Beaufort Research analysing the exporting behaviours of Small Medium Enterprises (SMEs).

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Background

Beaufort's Wales Business Omnibus provides a way to gauge the views of SMEs across Wales. The fieldwork for the Business Omnibus survey is syndicated with different subscribers each round asking a few questions of a representative sample of around 500 Welsh SMEs. Quotas are set on region, business activity (SIC) and size of business to ensure the interviewed sample is representative of Welsh based SMEs. Interviews are carried out by telephone with a fresh sample of businesses across Wales twice a year. Welsh Government subscribed to the autumn 2020 survey with a bank of questions around exports, or barriers to exports.

Main results

- Just over 1 in 10 (12%) SMEs report that they currently export outside the UK. Around 84% of SMEs had never exported.
- Just over 1 in 5 (21%) SMEs with 10+ employees report that they currently

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export goods and services outside the UK.

- Exporting activity was most prevalent in the manufacturing sector. Just over half (51%) SMEs within the manufacturing sector report that they currently export outside the UK.
- Among SMEs with a turnover of £501k+, around 2 in 10 (23%) currently export goods and services outside the UK.
- Approximately 1 in 10 (10%) SMEs that do not export report that they would at least consider doing so in the future.
- EU Exit, competition in overseas markets and transportation costs were the main barriers preventing SMEs exporting more in Autumn 2020.

Additional data is available in the [data tables](#) accompanying this report.

Methodology sampling and fieldwork

Beaufort Research design the business omnibus sample to be representative of all SME business establishments located in Wales. Business establishments are identified through ownership of a business telephone line. Participants are either single location businesses based in Wales, or have head offices in Wales.

'Businesses' are defined using [UK Standard Industrial Classification \(2003\)](#) categories.

- Agriculture, fishing, mining and utilities: A, B, C, E
- Manufacturing: D
- Construction, transport and communications: F, I
- Wholesale and retail: G
- Finance, real estate and business activities: J, K
- Hotels, restaurants and other services: H, O (90, 92, 93 only)

Note: categories L (Public administration and defence), M (Education), N (Health and Social Work), O (91 only: Membership organisations), P (Private households) and Q (Extra-territorial organisations) are excluded from the survey.

SMEs are defined as businesses with up to 250 employees (full or part-time) at the location contacted.

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Eligible respondents are defined as The Manager, Proprietor, Owner, Managing Director or other senior manager present at the time of interview.

A sample of businesses was selected randomly by Experian. Businesses within each activity group and region were then randomly contacted and interviewed until the quota targets had been met. Only one interview was conducted within any one business.

In total 504 telephone interviews were undertaken between 14 October and 19 November 2020.

All interviewing was undertaken by trained fieldworkers at Beaufort research in central Cardiff.

Interviews were conducted using Computer Aided Telephone Interviewing (CATI) technology.

Interlocking quotas were set on business activity and size within region by Beaufort Research based on universe counts supplied by Experian, from their **National Business Database**. The National Business Database consists mainly of data collect from Companies House (Ltd Company information) and Thomson Directory. This data is matched every month to produce a database of many millions of business location records.

The survey generated the following sample sizes in relation to exporting:

- 77 current exporters
- 19 who previously exported, but no longer do so
- 40 who would at least consider exporting in the future
- 385 who would not consider export / exporting not relevant

Output tables

A 24 cell weighting matrix (4 regions x 6 business activity groups) has been used to weight data to correct small deviations from the required quota, to match the National Business Database universe profile.

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Care should be taken in interpretation of data where the base sizes are particularly small. The following is a guide showing confidence intervals attached to various sample sizes (showing confidence intervals where the results would be at 50% and at 10 or 90%).

Table 1: 95% confidence intervals (excluding design factors) for different sample sizes

| | Un-weighted sample size | | |
|--------|-------------------------|----------|----------|
| | 500 | 75 | 40 |
| 50% | +/-4.4% | +/-11.3% | +/-15.5% |
| 10/90% | +/-2.6% | +/-6.8% | +/-9.3% |

Source: Beaufort Research Analysis

Data analysis categories

The following lists provide the categories the analysis is broken down by in the data tables.

Exporting status

- Exporter: currently export goods or services outside of the UK
- Previous exporter: previously exported goods/services, but no longer do so
- Consider exporting: report that they would definitely/possibly/at least consider exporting in the future
- Not consider and not relevant: report that they would not consider exporting / that it is not relevant to them

Number of employees (all part-time and full-time employees permanently employed at the location contacted, including

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respondent)

- 1 to 9
- 10 to 250

Standard Industrial Classification (2007) activity group

- Wholesale and retail: G
- Hotels, restaurants and other services: I, J (58, 59, 60 only), R, S (95, 96 only)
- Agriculture, fishing, mining and utilities: A, B, D, E
- Manufacturing: C
- Construction, transport/communications: F, H, J (61 only)
- Finance, real estate / business activities: J (62, 63 only), K, L, M, N

Turnover (for last financial year in relation to location contacted only)

- Under 100k
- £101 to 500k
- £501+
- Refused and DK

Area

- North Wales: Wrexham, Flintshire, Denbighshire. Conwy, Anglesey, old districts of Arfon and Dwyfor
- South east Wales: Bridgend, Blaenau Gwent, Caerphilly, Cardiff, Rhondda Cynon Taf, Monmouthshire, Newport, Merthyr, Torfaen, Vale of Glamorgan
- South west: Swansea, Neath & Port Talbot, Carmarthenshire, Pembrokeshire
- Mid Wales: Ceredigion, Powys, old district of Meirionnydd

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Comparability and coherence

Please note that these statistics are based on a business survey undertaken in Autumn 2020. The results can be considered alongside other sources of data on SME exporters such as the [Business Impact of COVID-19 Survey \(BICS\)](#), [Longitudinal Small Business Survey \(LSBS\)](#) and [Economic intelligence Wales report on export finance](#).

Notes on the use of statistical articles

Statistical articles generally relate to one-off analyses for which there are no updates planned, at least in the short-term, and serve to make such analyses available to a wider audience than might otherwise be the case. They are mainly used to publish analyses that are exploratory in some way, for example:

- introducing a new experimental series of data
- a partial analysis of an issue which provides a useful starting point for further research but that nevertheless is a useful analysis in its own right
- drawing attention to research undertaken by other organisations, either commissioned by the Welsh Government or otherwise, where it is useful to highlight the conclusions, or to build further upon the research
- an analysis where the results may not be of as high quality as those in our routine statistical releases and bulletins, but where meaningful conclusions can still be drawn from the results.

Where quality is an issue, this may arise in one or more of the following ways:

- being unable to accurately specify the timeframe used (as can be the case when using an administrative source)
- the quality of the data source or data used
- other specified reasons.

However, the level of quality will be such that it does not significantly impact upon the conclusions. For example, the exact timeframe may not be central to the conclusions that can be drawn, or it is the order of magnitude of the results,

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rather than the exact results, that are of interest to the audience.

The analysis presented does not constitute a National Statistic, but may be based on National Statistics outputs and will nevertheless have been subject to careful consideration and detailed checking before publication. An assessment of the strengths and weaknesses in the analysis will be included in the article, for example comparisons with other sources, along with guidance on how the analysis might be used, and a description of the methodology applied.

Articles are subject to the release practices as defined by the [release practices protocol](#), and so, for example, are published on a pre-announced date in the same way as other statistical outputs.

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