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### EXECUTIVE SUMMARY

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# GROWING PAINS: SUPPORTING INCLUSIVE GROWTH THROUGH UNDERSTANDING WOMEN- LED BUSINESS EXPORTING

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### ABSTRACT

This study employs a mixed-methods approach to explore the extent of, and factors influencing, the gender gap in exporting activity in the UK. We empirically analyse how being women-led influences exporting activity, using UK data between 2018-2023, and subsequently utilise a decomposition analysis to understand the factors contributing to observed gender gaps. We complement this with personal interviews with a small purposive sample of women-led firms. Our findings support the existence of a gender gap in exporting. Our decomposition results suggest gaps are influenced by factors such as firm sector and region. Women-led firms engaging in innovation and accessing business advice seems to contribute to narrowing the gap. Our qualitative findings highlight how gender may inform demand-side discrimination in foreign markets given cultural attitudes toward women in management and leadership roles in some country contexts.

### BACKGROUND

Exporting can positively influence firm performance, growth, productivity, and also induce learning to support innovation activities (Golovko and Valentini, 2011; Love and Roper, 2015; Gkypali et al., 2021). Despite these potential benefits, SMEs face a range of challenges to exporting (Haddoud et al., 2021) with prior research examining which SMEs engage in exporting, the challenges they face, and how exporters differ from non-exporters (Phillipson et al., 2019; Haddoud et al., 2021). Yet, little attention has been devoted to the participation, or reasons underpinning a potential lack thereof, of women-led SMEs in exporting (Pergelova et al., 2018; Mole et al., 2022; Arshed et al., 2025). Thus, understanding remains limited as to whether an SME being woman-led influences exporting capability and engagement, and if, or how, such patterns of exporting activity may be distinctive from male-led firms (Orser et al., 2010; Mole et al., 2022). This report aims to advance the evidence base on how gender influences SME exporting in the UK. Adopting a mixed-methods approach, we aim to address the following research questions:

1. *What are the differences and similarities between women-led and men-led SMEs in terms of their exporting capability and behaviour, how do these vary across characteristics such as firm size, sector, UK region, business challenges, and innovative capability, and which observable characteristics may explain such gender exporting differences?*

2. *How does being women-led influence SME a). export capability and b). exporting behaviour, and how do characteristics, such as firm innovation, size, region, and sector, moderate the effects of being women-led on SME exporting?*

## Key Findings

Our key findings are as follows:

- Generally, our probit regression results suggest that being a women-led business is significantly and negatively associated with export engagement and capability.
- Distinguishing by gender composition reveals more nuanced insights. While the negative association with export engagement and capability was consistently observed in our probit regression results for majority women-led businesses, the influence of being equally-led and majority male-led is comparatively less clear. For equally-led businesses, a significant negative association was observed for three of the five dependent variables in our probit regressions (either goods or services export; both goods and services export; goods export). For majority male-led businesses, a significant negative association was only observed for both goods and services exporting in our probit regressions.
- The decomposition analysis suggests factors that significantly contribute to the gender exporting gaps. Overall, sector and product/service development plans mainly widen the gap, while factors like product innovation and seeking business advice/information help reduce the gap.
- In deploying gender as an analytical lens in qualitative analysis, we aid understanding of the gender gap in exporting by highlighting the individual-level factors informing observed differences. We highlight how structural gendered barriers in the labour market informs women's over-representation as firm owners in crowded, service sectors with lower growth and export potential. Our qualitative findings illustrate how demand-side discrimination may be experienced by women leading businesses in different country contexts due to different cultural, and sometimes legal, institutional environments.

## POLICY IMPLICATIONS

For policymakers, our results highlight several important implications for supporting a more inclusive export ecosystem.

- Our finding that generally being a women-led business is negatively associated with export engagement and capability supports the rationale for targeted support for women-led businesses. While women tend to establish and lead smaller firms in sectors less conducive to export, many women wish to pursue growth through exporting but face various challenges, not least gendered barriers which contribute to the gender export gap.
- The findings suggested that a lack of awareness of available export assistance may hamper service uptake, with ensuing implications for SME export trajectories, experiences and success. To raise awareness among women-led SMEs and start-ups with early export potential, policymakers may wish to consider a targeted outreach campaign featuring women-led exporting firms as role models, across a range of sectors, firm sizes and regions.
- Our results highlight the potential value of product innovation and business advice in helping to close the gender exporting gap. For policymakers, this suggests that alongside the range of focused support to encourage greater SME exporting and make participation more inclusive, complementary areas of support focused on providing business advice and helping firms to enhance their innovation activities (e.g., innovation policy) may also have an important role to play. In this way, policymakers may seek to strive for greater cross-departmental coordination to deliver support to women on both product innovation and exporting to support enhanced and more inclusive export activity. Equally, given the potentially important role of business advice, policymakers may wish to build upon existing programmes, for example, the Women's International Network (WIN) Programme, and other business advice programmes, to support expanded and more inclusive export participation.