



**UK Trade
& Investment**



UK Trade & Investment

Performance & Impact Monitoring Survey (PIMS)

PIMS 32-35 Report (Part 2)

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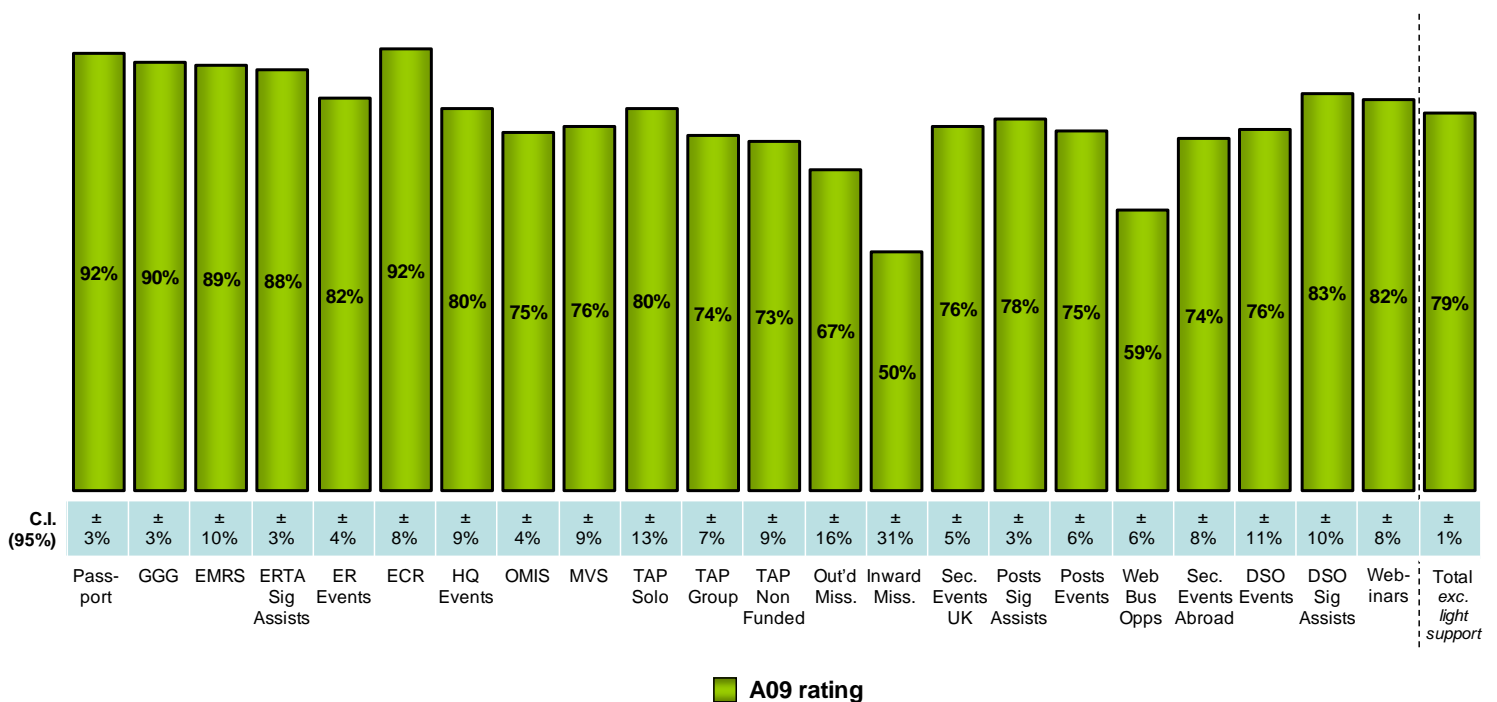
9. Quality & Satisfaction

9.1 Quality Rating - Measure A09

9.1.1 Summary

All supported businesses were asked to rate a number of aspects of the support they received, and these ratings have been summarised through the calculation of the weighted average proportion of firms providing a score of '4' or '5' on the 5-point scale across these aspects of service⁴⁰. This analysis forms one of the key survey measures, namely 'Measure A09 – Quality rating'.

Figure 9.1.1.1 Measure A09 – Quality Rating



Base: All respondents (Base) - Passport (360), GGG (362), EMRS (40), ERTA (360), ER Events (305), ECR (41), HQ Events (71), OMIS (380), MVS (96), TAP Solo (38), TAP Group (150), TAP Non Funded (102), Outward Missions (32), Inward Missions (10), Sector Events UK (297), Posts Sig Assists (617), Posts Events (201), Website Bus Opps (289), Sector Events Abroad (104), DSO Events (59), DSO Sig Assists (60), Webinars (80), Total excl. light support (3714)

The support provided by UKTI is generally felt to be of a high quality, with a mean quality rating of 79% across all services. This is just below the UKTI target of 80%.

The quality rating is highest for Passport, ECR, GGG, EMRS and ERTA Significant Assists, with a mean score of around 90% for these services.

⁴⁰ Further details of the specific service elements rated for each service are provided later in this section.

Each product/service has been classified according to UKTI's traffic light system, based on the following definitions:

'Super' green	A09 = 80%+ and all individual ratings are 80% or more
Green	A09 = 80%+ but at least one individual score is under 80%
Amber green	A09 = 75-79%
Amber red	A09 = 70-74%
Red	A09 = < 70%

Figure 9.1.1.2 Measure A09 – Quality Rating Classification

	Total (exc. light support)	Passport	GGG	EMRS	ERTA	ER Events	ECR
Base	3714	360	362	40	360	305	41
Average proportion scoring '4' or '5'	79%	92%	90%	89%	88%	82%	92%

	HQ Events	OMIS	MVS	TAP SOLO	TAP Group	TAP Non Funded	Out'd Miss.	In'd Miss.
Base	71	380	96	38	150	102	32	10
Average proportion scoring '4' or '5'	80%	75%	76%	80%	74%	73%	67%	50%

	Sector Events UK	Posts Sig. Assists	Post Events	Web Bus Opps	Sector Events Abroad	DSO Events	DSO Sig. Assists	Webinars
Base	297	617	201	289	104	59	60	80
Average proportion scoring '4' or '5'	76%	78%	75%	59%	74%	76%	83%	82%

Passport, EMRS and ECR have been classed as 'super green' by virtue of the fact that a score of at least 80% is achieved for every individual element that makes up the overall quality rating. GGG, ERTA, ER Events, HQ Events, TAP Solo, DSO Significant Assists and Webinars are all classified as 'green' by the traffic light system, as the overall quality rating is at least 80% for these services.

Outward Missions, Inward Missions and the Website Business Opportunities service are all categorised as 'red' services, as the overall quality rating is less than 70%. However, the low base sizes for Outward Missions (32 respondents) and particularly Inward Missions (just 10 respondents) should be considered when interpreting these results.

Measure A09 has also been calculated separately for each broad type of UKTI service and, as seen below, UK-based advisory services receive significantly higher quality ratings than all the other support categories.

Figure 9.1.1.3 Measure A09 – Quality Rating – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Average proportion providing a rating of '4' or '5'	89%	77%	77%	75%	75%

Very recent exporters with less than 2 years' experience are also more positive about the quality of the UKTI support.

Figure 9.1.1.4 Measure A09 – Quality Rating – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Average proportion providing a rating of '4' or '5'	82%	77%	77%

However, there is no statistically significant difference in the perceived quality of the UKTI support delivered to innovative and non-innovative firms.

Figure 9.1.1.5 Measure A09 – Quality Rating – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Average proportion providing a rating of '4' or '5'	78%	80%	78%	80%

Although it appears that firms who plan to grow over the next 5 years have a better perception of the quality of the support they have received, this difference is not statistically significant.

Figure 9.1.1.6 Measure A09 – Quality Rating – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Average proportion providing a rating of '4' or '5'	72%	78%	80%

There are also no significant differences by whether firms are 'born global' or not, or by age of firm.

Figure 9.1.1.7 Measure A09 – Quality Rating – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Average proportion providing a rating of '4' or '5'	78%	78%	82%	80%	78%

As seen below, size of firm also has little impact on the perceived quality of UKTI export support.

Figure 9.1.1.8 Measure A09 – Quality Rating – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Average proportion providing a rating of '4' or '5'	79%	78%	77%	78%

There is also little difference in the mean quality ratings by annual turnover

Figure 9.1.1.9 Measure A09 – Quality Rating – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Average proportion providing a rating of '4' or '5'	81%	78%	78%	77%	83%

UKTI support about high growth and established markets appears to be of a similar quality.

Figure 9.1.1.10 Measure A09 – Quality Rating – By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Average proportion providing a rating of '4' or '5'	79%	80%

There is also no difference in the quality ratings by whether or not firms have a business plan or have degree-level educated members of the senior management team.

Figure 9.1.1.11 Measure A09 – Quality Rating – By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Average proportion providing a rating of '4' or '5'	79%	78%	78%	79%	77%

As seen below, quality levels are similar for production and service sector firms.

Figure 9.1.1.12 Measure A09 – Quality Rating – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Average proportion providing a rating of '4' or '5'	78%	79%	82%

9.1.2 Passport

The table below shows the individual ratings provided for each aspect of the Passport scheme, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating.

Figure 9.1.2.1 Individual Quality Ratings - Passport

Individual Quality Rating	Passport To Export (A09=92%)		
	% scoring 4 or 5	Base	Weight
Impartiality of ITA	92%	All respondents (360)	17%
Competence & knowledge of ITA	92%	All respondents (360)	17%
Ability of ITA to communicate clearly & effectively	93%	All respondents (360)	17%
Quality & relevance of info & advice	88%	All respondents (360)	25%
Attitude & professionalism of ITA	94%	All respondents (360)	25%

The Passport scheme receives very high quality ratings across all elements of the service. The overall quality rating for Passport has increased very slightly from 91% in 2012 to 92% currently, and although this change is not statistically significant it does suggest a continuation of the upward pattern observed from the 87% reported in 2011.

9.1.3 GGG

The table below shows the individual ratings provided for each aspect of the Gateway to Global Growth programme, along with details of which respondents rated each element and the weights applied in calculating the overall quality rating. Please note that the weights are adjusted accordingly if respondents have not rated all service elements (e.g. if they were not referred to other support).

Figure 9.1.3.1 Individual Quality Ratings - GGG

Individual Quality Rating	Gateway to Global Growth (A09=90%)		
	% scoring 4 or 5	Base	Weight
Impartiality of ITA	93%	All respondents (362)	17%
Competence & knowledge of ITA	91%	All respondents (362)	17%
Ability of ITA to communicate clearly & effectively	94%	All respondents (362)	17%
Quality & relevance of info & advice	85%	All respondents (362)	8%
Attitude & professionalism of ITA	96%	All respondents (362)	25%
Relevance of UKTI referrals	69%	All referred to other UKTI support (267)	8%
Relevance of non-UKTI referrals	66%	All referred to non-UKTI support (120)	8%

The overall quality rating for GGG remains high, and is the same as that seen last year (90%). GGG receives high quality ratings for those elements directly relating to the ITAs, but the relevance of any referrals to other support services/providers could undoubtedly be improved.

9.1.4 EMRS

The table below shows the individual ratings provided for each aspect of the EMRS scheme, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating. Please note that the weights are adjusted as necessary where respondents have not rated all service elements (e.g. if they have not done a subsidised research project).

Figure 9.1.4.1 Individual Quality Ratings - EMRS

Individual Quality Rating	Export Marketing Research Scheme (A09=89%)		
	% scoring 4 or 5	Base	Weight
Quality & relevance of research project	94%	All doing a subsidised research project (31)	17%
Impartiality of the advisor	88%	All respondents (40)	13%
Competence & knowledge of advisor	90%	All respondents (40)	13%
Ability of advisor to communicate clearly & effectively	93%	All respondents (40)	13%
Advice & assistance provided by advisor in helping select & manage the research consultant	81%	All doing a subsidised research project (31)	13%
The quality and relevance of any (other) advice or assistance provided by advisor	80%	All respondents (40)	17%
Attitude & professionalism of advisor	95%	All respondents (40)	17%

The overall quality rating for EMRS is high at 89%, which is a small (but not statistically significant) increase from the 87% recorded in 2012. This change is largely driven by a major improvement in the quality of the advice provided by the Export Marketing Research Advisor in helping to select and manage the consultant used for the research project (up from 57% to 81%).

9.1.5 ERTA Significant Assists

The table below shows the individual ratings provided for ERTA Significant Assists, along with details of which respondents rated each element and the weights applied in calculating the overall quality rating.

Figure 9.1.5.1 Individual Quality Ratings – ERTA Significant Assists

Individual Quality Rating	ERTA Significant Assists (A09=88%)		
	% scoring 4 or 5	Base	Weight
Impartiality of ITA	92%	All respondents (360)	17%
Competence & knowledge of ITA	88%	All respondents (360)	17%
Ability of ITA to communicate clearly & effectively	91%	All respondents (360)	17%
Quality & relevance of information & advice	78%	All except 'signposted only' (350)	25%
Attitude & professionalism of ITA	94%	All respondents (360)	25%

At 88% the overall ERTA quality rating remains high, and very similar to the 87% recorded a year ago. The ITAs themselves receive consistently high ratings, although there is still scope to improve the quality and relevance of the information and advice provided.

9.1.6 ER Events

The table below shows the individual ratings provided for each aspect of the English Regions' Events, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating. Please note that the weights are adjusted as necessary where respondents have not rated all service elements (e.g. if they have not attended an event with speaker presentations).

Figure 9.1.6.1 Individual Quality Ratings – ER Events

Individual Quality Rating	English Regions' Events (A09=82%)		
	% scoring 4 or 5	Base	Weight
Organisation of the practical arrangements	87%	All respondents (305)	20%
Competence & knowledge of the speakers	91%	All attending event with speaker presentations (266)	20%
Speakers' ability to communicate clearly & effectively	91%	All attending event with speaker presentations (266)	20%
Quality & relevance of the presentations	87%	All attending event with speaker presentations (266)	20%
Quality & relevance of any contacts made	54%	All attending event with networking opportunities (243)	20%

ER Events receive an overall quality rating of 82%, consistent with the 81% recorded in 2012. Most service aspects are rated highly, but the quality and relevance of the contacts made by firms attending networking events is clearly an area that could be improved.

9.1.7 ECR

The table below shows the individual ratings provided for ECR, along with details of which respondents rated each element and the weights applied to each one.

Figure 9.1.7.1 Individual Quality Ratings – ECR

Individual Quality Rating	Export Communications Review (A09=92%)		
	% scoring 4 or 5	Base	Weight
Quality & relevance of information & advice	90%	All respondents (41)	33%
Impartiality of communications consultant	90%	All respondents (41)	17%
Competence & knowledge of communications consultant	93%	All respondents (41)	17%
Ability of communications consultant to communicate clearly and effectively	95%	All respondents (41)	17%
Attitude & professionalism of communications consultant	95%	All respondents (41)	17%

The overall ECR quality rating is high at 92%, a similar level to the 90% achieved in 2012. All aspects of ECR receive extremely positive ratings, and this has pushed the overall A09 score into the 'super' green category.

9.1.8 HQ Events

The table below shows the individual ratings provided for each aspect of the HQ Events, along with details of which respondents rated each element and the weights applied in calculating the overall quality rating. Please note that the weights are adjusted accordingly where respondents have not rated all service elements.

Figure 9.1.8.1 Individual Quality Ratings – HQ Events

Individual Quality Rating	HQ Events (A09=80%)		
	% scoring 4 or 5	Base	Weight
Organisation of the practical arrangements	85%	All respondents (71)	20%
Competence & knowledge of the speakers	92%	All attending event with speaker presentations (53)	20%
Speakers' ability to communicate clearly & effectively	91%	All attending event with speaker presentations (53)	20%
Quality & relevance of presentations	87%	All attending event with speaker presentations (53)	20%
Quality & relevance of any contacts made	52%	All attending event with networking opportunities (60)	20%

The overall quality rating for HQ Events is 80%, a similar level to that seen last year (82%). The speakers are a particular strength of these events. However, there is clear scope to improve the quality of the contacts made by attendees.

9.1.9 OMIS

The table below shows the individual ratings provided for each aspect of the OMIS service, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating. Please note that the weights are adjusted accordingly where respondents have not rated all elements.

Figure 9.1.9.1 Individual Quality Ratings - OMIS

Individual Quality Rating	OMIS (A09=75%)		
	% scoring 4 or 5	Base	Weight
Quality & relevance of information & advice	71%	All except those where only support was event organisation (370)	19%
Clarity & ease of understanding of information & advice	82%	All except those where only support was event organisation (370)	19%
Quality & relevance of any contacts provided	62%	All receiving contacts, appointments or event organisation (360)	19%
Communications with staff at main access point (ITA/post/other)	81%	All respondents (380)	8%
Communications with embassy staff	75%	All having contact with embassy but not as main access point (234)	8%
Embassy staff's objectivity & acting in your best interests	80%	All having contact with embassy (338)	4%
Attitude & professionalism of embassy staff	86%	All having contact with embassy (338)	4%
Organisation of practical arrangements for event	93%	All having event organised for them (133)	19%

With an overall quality rating of 75% (almost the same level as the 76% seen in 2012), there is still some room for improvement on the OMIS service.

The key strength of OMIS is the organisation of events and the professionalism of the staff at the posts. However, the overall quality rating is being pulled down by the quality and relevance of the contacts provided and, to a slightly lesser extent, the quality of the information provided and the communications with the embassy staff (where they are not the main access point).

Previous qualitative work⁴¹ that explored perceptions of the OMIS service in more detail concluded that the quality and relevance of the contacts and information are seen as ‘must haves’ and are instrumental to firms’ overall satisfaction with the service. Whilst it is clearly desirable to deliver well in other areas (e.g. professional and courteous staff, good communication, etc) this will not lead to a positive perception of the service if the basic requirements of good quality contacts and/or information are not provided.

9.1.10 MVS

The table below shows the individual ratings provided for each aspect of the MVS service, along with details of which respondents rated each element and the weights applied. Please note that the weights are adjusted accordingly if respondents have not rated all service elements (e.g. if they did not attend as part of a group/delegation).

Figure 9.1.10.1 Individual Quality Ratings - MVS

Individual Quality Rating	Market Visit Support (A09=76%)		
	% scoring 4 or 5	Base	Weight
UKTI helping to prepare for the visit	77%	All respondents (96)	33%
Organisation of practical arrangements	90%	All attending as part of a group (20)	33%
Quality & relevance of any contacts made	71%	All respondents (96)	17%
Quality & relevance of any info obtained	77%	All respondents (96)	17%

All of the individual quality elements have decreased for MVS over the past year. As a result, the overall quality score has fallen from 85% last year to 76% currently and it is now classed as an ‘amber green’ service. However, it should be noted that this change is not statistically significant due to the relatively low base size.

⁴¹ Understanding dissatisfaction with UKTI’s OMIS service and exploring ideas for improvement (OMB Research, 2012).

9.1.11 TAP Solo

The table below shows the individual ratings provided for each aspect of the TAP Solo service, along with details of which respondents rated each element and the weights applied in calculating the overall quality rating.

Figure 9.1.11.1 Individual Quality Ratings – TAP Solo

Individual Quality Rating	TAP Solo (A09=80%)		
	% scoring 4 or 5	Base	Weight
UKTI helping to prepare for the event	71%	All respondents (38)	33%
Overall quality of the event	84%	All respondents (38)	33%
Quality & relevance of any contacts made	89%	All respondents (38)	17%
Quality & relevance of any info obtained	79%	All respondents (38)	17%

The overall quality rating of 80% for TAP Solo is consistent with that recorded a year ago. Firms are particularly positive about the quality and relevance of the contacts they made, although the assistance provided to help firms prepare for the event could still be improved.

9.1.12 TAP Group

The table below shows the individual ratings provided for each aspect of the TAP Group service, along with details of which respondents rated each element and the weights applied in calculating the overall quality rating. Please note that the weights are adjusted accordingly if respondents have not rated all service elements.

Figure 9.1.12.1 Individual Quality Ratings – TAP Group

Individual Quality Rating	TAP Group (A09=74%)		
	% scoring 4 or 5	Base	Weight
Trade Association/ATO ⁴² in helping to prepare for the event	72%	All respondents (150)	11%
Trade Association/ATO's organisation of practical arrangements for the delegation	71%	All respondents (150)	11%
Quality & relevance of Trade Association/ATO briefing or report	70%	All receiving briefing/report (33)	11%
Overall quality of the event	83%	All respondents (150)	17%
Quality & relevance of any contacts made	80%	All respondents (150)	17%
Quality & relevance of any info obtained	71%	All respondents (150)	17%
Quality and profile of the UK delegation	73%	All respondents (150)	17%

The overall quality rating for TAP Group (74%) is at a similar level to that seen in the last year (73%). The main strengths of the service are the quality of the events themselves and the contacts that firms are able to make while at the tradeshow.

⁴² UKTI Accredited Trade Organisation

9.1.13 TAP Non Funded

The table below shows the individual ratings provided for each aspect of the TAP Non-Funded service, along with the weights applied to each one in calculating the overall quality rating. Please note that the weights are adjusted accordingly if respondents have not rated all service elements.

Figure 9.1.13.1 Individual Quality Ratings – TAP Non-Funded

Individual Quality Rating	TAP Non-Funded (A09=73%)		
	% scoring 4 or 5	Base	Weight
Trade Association/ATO ⁴³ in helping to prepare for the event	74%	All where trip organised by Trade Association/ATO (90)	11%
Trade Association/ATO's organisation of practical arrangements for the delegation	71%	All where trip accredited by Trade Association/ATO (90)	11%
Quality & relevance of Trade Association/ATO briefing or report	76%	All receiving briefing/report (17)	11%
Overall quality of the event	80%	All respondents (102)	17%
Quality & relevance of any contacts made	78%	All respondents (102)	17%
Quality & relevance of any info obtained	71%	All respondents (102)	17%
Quality and profile of the UK delegation	65%	All respondents (102)	17%

The overall quality rating for TAP Non-Funded has increased from 65% last year to 73% currently, although this difference is not statistically significant. While the events themselves and the contacts made are both highly rated, firms are often less impressed with the quality and profile of the UK delegation.

9.1.14 Outward Missions

The table below shows the individual ratings provided for each aspect of the Outward Missions, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating.

Figure 9.1.14.1 Individual Quality Ratings – Outward Missions

Individual Quality Rating	Outward Missions (A09=67%)		
	% scoring 4 or 5	Base	Weight
UKTI helping to prepare for the mission	56%	All respondents (32)	17%
UKTI's organisation of the practical arrangements	91%	All respondents (32)	17%
Quality & relevance of any contacts made	59%	All respondents (32)	50%
Quality of any activities arranged for the mission	78%	All respondents (32)	17%

The overall Outward Missions quality rating of 67% is at a similar level to that reported a year ago (64%), and this service is still classified as 'red'. Just over half of firms give a 'good' score for the quality of the contacts they make on these missions or for the assistance provided to help them prepare for their visit. However, it should be noted that most of the remainder gave ambivalent scores of 3 out of 5 for these elements rather than a poor score of 1-2.

⁴³ UKTI Accredited Trade Organisation

9.1.15 Inward Missions

The table below shows the individual ratings provided for each aspect of the Inward Missions, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating. Please be aware of the extremely low base size when interpreting these results.

Figure 9.1.15.1 Individual Quality Ratings – Inward Missions

Individual Quality Rating	Inward Missions (A09=50%)		
	% scoring 4 or 5	Base	Weight
UKTI's organisation of the practical arrangements	80%	All respondents (10)	33%
Profile of the overseas delegation	40%	All respondents (10)	33%
Quality & relevance of any contacts made	30%	All respondents (10)	33%

UKTI is generally doing a good job when it comes to the practical arrangements for Inward Missions. However, in many cases this is being undermined by the profile of the overseas visitors attending and, connected to this, the quality and relevance of any contacts made (with only 40% and 30% respectively giving a score of 4-5 for these elements). This has resulted in an overall quality rating of just 50% (no significant change on the 65% recorded last year, due to very low base sizes).

9.1.16 Sector Events UK

The table below shows the individual ratings provided for each aspect of the Sector Events UK, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating. Please note that the weights are adjusted accordingly where respondents have not rated all service elements (e.g. if they have not had attended an event with speaker presentations).

Figure 9.1.16.1 Individual Quality Ratings – Sector Events UK

Individual Quality Rating	Sector Events in the UK (A09=76%)		
	% scoring 4 or 5	Base	Weight
UKTI staff's organisation of the practical arrangements	82%	All respondents (297)	20%
Competence & knowledge of the speakers	85%	All attending event with speaker presentations (227)	20%
Speakers' ability to communicate clearly & effectively	82%	All attending event with speaker presentations (227)	20%
Quality & relevance of the presentations	78%	All attending event with speaker presentations (227)	20%
Quality & relevance of any contacts made	58%	All attending event with networking opportunities (268)	20%

Sector Events UK remain an 'amber green' service, with an overall quality rating of 76% (compared to 79% a year ago). The competence and knowledge of the speakers is still a major strength of these events. However, less than two-thirds of those attending an event with networking opportunities gave a high rating for the quality and relevance of the contacts they made.

9.1.17 Posts Significant Assists

The table below shows the individual ratings provided by firms recorded as significant assists by the overseas posts, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating. Please note that the weights are adjusted accordingly where respondents have not rated all service elements (e.g. if they were not provided with any contacts).

Figure 9.1.17.1 Individual Quality Ratings – Posts Significant Assists

Individual Quality Rating	Posts Significant Assists (A09=78%)		
	% scoring 4 or 5	Base	Weight
Competence & knowledge of embassy staff	82%	All respondents (617)	13%
Ability of embassy staff to communicate clearly & effectively	88%	All respondents (617)	13%
Quality & relevance of information & advice	69%	All except 'signposted only' (601)	25%
Attitude & professionalism of embassy staff	89%	All respondents (617)	25%
Embassy staff for being objective and acting in your best interests	75%	All respondents (617)	13%
Quality & relevance of any contacts made	57%	All receiving contact lists, political support or contact facilitation (409)	13%

The overall quality rating for Posts Significant Assists (78%) is similar to the level seen a year ago (79%).

Those aspects relating to the embassy staff themselves are generally highly rated, particularly their attitude, competence and communication skills. However, there is clear scope to improve the quality and relevance of the contacts provided and, to a lesser extent, the quality and relevance of the information provided. It also appears that some firms have reservations about the objectivity of the advice provided by staff in post, with only 75% scoring 4-5 out of 5 for this aspect.

9.1.18 Posts Events

Firms attending Posts Events were asked slightly different quality ratings depending on whether they were one of the speakers at a seminar or whether they were simply an attendee/audience member at the event. The table below shows the individual ratings for each of these groups, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating. Please note that the weights are adjusted accordingly if respondents have not rated all service elements (e.g. if the event was not a seminar).

Please also be aware of the extremely low base sizes for the ‘seminar speakers’ group (just 15 firms).

Figure 9.1.18.1 Individual Quality Ratings – Posts Events

Individual Quality Rating	Posts Events (A09=75%)		
	% scoring 4 or 5	Base	Weight
Event Attendees (non-speakers)			
Organisation of the practical arrangements for the event	84%	All event attendees (186)	25%
Quality & relevance of the presentations	74%	All attending a seminar (43)	25%
Quality & relevance of the briefing	73%	All attending a briefing (89)	25%
Quality & relevance of any contacts made	66%	All attending a networking event (153)	25%
Seminar Speakers			
Organisation of the practical arrangements for the event	80%	All speakers (15)	20%
Size of seminar audience	53%	All speakers (15)	20%
Profile of seminar audience in terms of the right people being there	40%	All speakers (15)	20%
Quality of other speakers from the UK	87%	All speakers (15)	20%
Quality & relevance of any contacts made	40%	All speakers (15)	20%

The overall quality rating for Posts Events is unchanged on the level seen last year, at 75%.

Among attendees (who did not speak at these events) the organisation of the practical arrangements for these events is highly rated. However, the quality and relevance of the contacts that firms make at these events could certainly be improved.

It is not possible to draw any robust conclusions on the experiences of seminar speakers as the data is based on just 15 interviews. However, there is some suggestion that the organisation of the practical arrangements for the events and the quality of the other speakers are highly regarded, whereas the size and profile of the seminar audience and the quality of the contacts made could be improved.

9.1.19 Website Business Opportunities Service

The table below shows the individual ratings provided for the Website Business Opportunities service, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating. Please note that the weights are adjusted accordingly if respondents have not rated all service elements (e.g. if they did not have any contact with staff in post).

Figure 9.1.19.1 Individual Quality Ratings – Website Business Opportunities

Individual Quality Rating	Website Business Opportunities (A09=59%)		
	% scoring 4 or 5	Base	Weight
Quality & relevance of info in the web summary	56%	All respondents (289)	14%
Clarity & ease of understanding of info in the web summary	67%	All respondents (289)	14%
Level of detail provided in the web summary	46%	All respondents (289)	14%
Ease of use and navigation of the site (in terms of finding the business opportunities area)	64%	All respondents (289)	16%
Quality & relevance of info provided by embassy staff	55%	All having contact with embassy staff (266)	11%
Clarity & ease of understanding of info provided by embassy staff	64%	All having contact with embassy staff (266)	11%
Level of detail provided by embassy staff	54%	All having contact with embassy staff (266)	11%
Speed of response from post	65%	All having contact with embassy staff (266)	11%

The Website Business Opportunities service continues to be classified as ‘red’, with an overall quality rating of just 59%. This is a slight improvement on the 55% recorded a year ago, although this is not statistically significant.

There is clear scope to improve all aspects of the service, with the most obvious areas being the level of detail provided about each opportunity (both in the summary posted on the website and to a lesser extent in the information provided by the embassy staff) and the quality and relevance of this information.

Encouragingly, there has been a significant increase in the proportion scoring 4-5 out of 5 for the ease of using the site and navigating to the business opportunities area (from 54% in 2012 to 64% currently).

Those Website Business Opportunities users that gave a poor score (1-3 out of 5) for the level of detail provided in the summary posted on the website were asked whether this was because it did not contain enough detail or because it provided too much detail. As seen below, in almost all cases it was felt that the summary information was too brief.

Figure 9.1.19.2 Reasons for Giving Poor Score for Level of Detail in Web Summary – Website Business Opportunities

	Web Bus Opps
<i>Base: All giving poor score (1-3 out of 5)</i>	144
Did not contain enough detail	90%
Contained too much detail	2%
Don't know	8%

A similar question was asked to those firms giving a poor score (1-3 out of 5) for the level of detail provided by the embassy/consulate staff. As with the web summary, the overwhelming consensus was that where the level of detail provided by post staff is poor, this is because it lacks sufficient detail.

Figure 9.1.19.3 Reasons for Giving Poor Score for Level of Detail from Post Staff – Website Business Opportunities

	Web Bus Opps
<i>Base: All giving poor score (1-3 out of 5)</i>	99
Did not provide enough detail	87%
Provided too much detail	6%
Don't know	7%

The above results were echoed in qualitative research undertaken for UKTI into the Web Business Opportunities service⁴⁴. Feedback from this study indicated that some of the opportunities posted on the site are not specific enough, and often omit relevant information about the type of firm offering the opportunity or about exactly what potential suppliers will be expected to deliver. Some firms felt that the web summaries should ideally include either links to the client's website or other supplementary information such as a full written brief or similar, as this would allow those wanting more detail to access it while maintaining the required degree of brevity within the summaries themselves.

The qualitative research also found that when it comes to the information provided by the staff at the embassy/consulate, firms generally expect more detail about specific aspects of the opportunity. Crucially they felt that it was imperative that they be provided with enough information to decide whether or not to formally pursue an opportunity at this point. Some firms mentioned needing details of the specific technical or commercial requirements, information about the type of supplier/service being sought (e.g. size, type of goods/services, quantities, etc) and details about the end-client company (including a named contact). It was also noted that the level of detail provided is not consistent from market to market.

⁴⁴ Understanding dissatisfaction with Website Business Opportunities service and exploring ideas for improvement (OMB Research, 2012)

9.1.20 Sector Events Abroad

Firms attending Sector Events Abroad were asked slightly different quality ratings depending on whether they were one of the speakers at a seminar or whether they were simply an attendee/audience member at the event. The table below shows the individual ratings for each of these groups, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating. Please note that the weights are adjusted as necessary where respondents have not rated all service elements (e.g. if the event was not a seminar).

Please also be aware of the low base sizes for the ‘seminar speakers’ group (just 10 firms).

Figure 9.1.20.1 Individual Quality Ratings – Sector Events Abroad

Individual Quality Rating	Sector Events Abroad (A09=74%)		
	% scoring 4 or 5	Base	Weight
Event Attendees (non-speakers)			
Organisation of the practical arrangements for the event	80%	All event attendees (94)	33%
Quality & relevance of the presentations	85%	All attending a seminar (40)	33%
Quality & relevance of any contacts made	63%	All attending a networking event (52)	33%
Seminar Speakers			
Organisation of the practical arrangements for the event	100%	All speakers (10)	20%
Size of seminar audience	50%	All speakers (10)	20%
Profile of seminar audience in terms of the right people being there	60%	All speakers (10)	20%
Quality of other speakers from the UK	90%	All speakers (10)	20%
Quality & relevance of any contacts made	50%	All speakers (10)	20%

Overall, Sector Events Abroad receives a relatively low quality rating of 74%. Although this compares favourably to the 69% seen last year, this apparent increase is not statistically significant. However, it is now classified as ‘amber red’ rather than a ‘red’ performing service.

Among event attendees (i.e. non-speakers) results are highest for the quality and relevance of the presentations and the organisation of the practical arrangements. However, the quality and relevance of the contacts made at these events could certainly be improved.

All 10 of the speakers at these events give a very high rating for UKTI’s organisation of the practical arrangements, and the majority were also positive about the quality of other speakers from the UK. There is scope to improve all other aspects of the service, although the low base size should be taken into account when interpreting these results.

9.1.21 DSO Events

The table below shows the individual ratings provided for each aspect of the DSO Events, along with details of which respondents rated each element and the weights applied. Please note that the weights are adjusted accordingly where respondents have not rated all service elements (e.g. if there were no speaker presentations).

Figure 9.1.21.1 Individual Quality Ratings – DSO Events

Individual Quality Rating	DSO Events (A09=76%)		
	% scoring 4 or 5	Base	Weight
Organisation of the practical arrangements	90%	All respondents (59)	20%
Competence & knowledge of the speakers	83%	All attending event with speaker presentations (35)	20%
Speakers' ability to communicate clearly & effectively	77%	All attending event with speaker presentations (35)	20%
Quality & relevance of the presentations	74%	All attending event with speaker presentations (35)	20%
Quality & relevance of any contacts made	60%	All attending event with networking opportunities (52)	20%

DSO Events achieve an overall quality rating of 76%, the same figure as that recorded a year ago. The organisation of the practical arrangements and the competence and knowledge of the speakers are both clear strengths of these events, but firms are less positive about the quality of the contacts they made.

9.1.22 DSO Significant Assists

The table below shows the individual ratings provided by firms recorded as DSO Significant Assists, along with details of which respondents rated each element and the weights applied in calculating the overall quality rating.

Figure 9.1.22.1 Individual Quality Ratings – DSO Significant Assists

Individual Quality Rating	DSO Significant Assists (A09=83%)		
	% scoring 4 or 5	Base	Weight
Impartiality of ITA	85%	All respondents (60)	17%
Competence & knowledge of ITA	83%	All respondents (60)	17%
Ability of ITA to communicate clearly & effectively	88%	All respondents (60)	17%
Quality & relevance of information & advice	68%	All except 'signposted only' (59)	25%
Attitude & professionalism of ITA	93%	All respondents (60)	25%

An overall quality rating of 83% is achieved for DSO Significant Assists, meaning that it is classified as a 'green' performing service. This rating is similar to the 86% recorded in the previous year. All aspects of this service receive extremely high ratings, with the exception of the quality and relevance of the information and advice which needs to be improved to bring it more in line with the other elements.

9.1.23 Webinars

The table below shows the individual ratings provided by firms attending webinars, along with details of which respondents rated each element and the weights applied to each one in calculating the overall quality rating.

Figure 9.1.23.1 Individual Quality Ratings – Webinars

Individual Quality Rating	Webinars (A09=82%)		
	% scoring 4 or 5	Base	Weight
Competence & knowledge of speakers	91%	All respondents (80)	20%
Ability of speakers to communicate clearly & effectively	86%	All respondents (80)	20%
Quality & relevance of presentations	68%	All respondents (80)	20%
Ease of installing software & logging on	88%	All respondents (80)	13%
Reliability & quality of streaming (i.e. audio & visuals)	83%	All respondents (80)	13%
Ease of using system during webinar (e.g. asking questions, etc.)	75%	All respondents (80)	13%

The overall webinar quality rating is high, at 82%, and it is therefore classified as a 'green' performing service.

The competence, knowledge and communication skills of the speakers, as well as the ease of set up (installing software and logging in) are very highly rated. In comparison, there is room for improvement in the quality and relevance of presentations, with only 68% scoring 4-5 out of 5 for this aspect. There are also some concerns about the ease of using the system during the webinar (e.g. asking questions, etc.), with only 75% giving a high score for this service aspect.

9.2 Clear Information Rating - Measure B09 (OMIS)

OMIS users were asked to rate a number of aspects relating to the clarity of the support they received, and these ratings have been summarised through the calculation of the (weighted) average proportion of firms providing a score of '4' or '5' on a 5-point scale across these aspects of service. This analysis forms one of the key survey measures, namely 'Measure B09 – Clear Information Rating'.

The table below provides details of the results for this measure, both in total and by the number of years firms have been doing business overseas.

Figure 9.2.1 Measure B09 – Clear Information Rating

	OMIS Total	When Started Exporting		
		Less than 2 years	2-10 years	More than 10 years
<i>Base</i>	380	79	123	171
Average proportion providing a rating of '4' or '5'	81%	80%	84%	80%
95% confidence intervals	± 4%	± 9%	± 6%	± 6%

Overall, 81% of OMIS users score against 'Measure B09 – Clear Information Rating'. This is marginally higher than the 79% seen a year ago (during the PIMS 28-31 period), but this difference is not statistically significant.

There are no significant differences by export experience when looking at Measure B09 and, as seen below, there is also no difference by whether or not firms have a business plan or degree-level qualified members of the senior management team.

Figure 9.2.2 Measure B09 – Clear Information Rating – By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base</i>	210	56	72	279	37
Average proportion providing a rating of '4' or '5'	84%	81%	78%	84%	78%
95% confidence intervals	± 5%	± 10%	± 10%	± 4%	± 13%

The panel below provides further details of how Measure B09 has been calculated for this survey (please note that the references in brackets refer to the question number, with the questionnaire appended to this report).

B09 – Clear Information Rating (OMIS)

The clear information rating is the (weighted) average proportion of OMIS users scoring ‘4’ or ‘5’ on a 5-point scale for the extent to which it was made clear what to expect in terms of...

- The format and content of the final report (C2c(a)) - 50% weight
- And, the time it would take to receive the report (C2c(b)) - 25% weight
- And, the cost of using the OMIS service (C2c(c)) - 25% weight

Please note that if the OMIS did not take the form of a ‘report’ then Measure B09 is based only on the rating for the cost of using the service (C2c(c))

The table below shows the proportion of firms providing a score of ‘4’ or ‘5’ out of 5 for each individual element of the Clear Information Rating. The majority of firms felt that the format/content of the report, timescales involved and cost had been made clear to them. That said, it could be argued that these 3 key elements should be made clear in 100% of cases as they are a fundamental part of the specification process, so there is still scope for further improvement in this regard.

Figure 9.2.3 Individual Clear Information Ratings

	OMIS Total	When Started Exporting		
		Less than 2 years	2-10 years	More than 10 years
<i>Base</i>	380	79	123	171
Format & content of final report	77%	75%	81%	76%
Time taken to receive report	76%	79%	72%	77%
Cost of using the service	89%	87%	92%	88%

9.3 Comparison with Expectations

Firms accessing support through OMIS, the Website Business Opportunities service and Webinars were asked a number of questions to assess how this compared to their expectations.

9.3.1 OMIS

OMIS users were asked how their experience of the support had compared with their initial expectations, with the following results.

Figure 9.3.1.1 Comparison with Expectations

	OMIS Total	When Started Exporting		
		Less than 2 years	2-10 years	More than 10 years
<i>Base: OMIS users</i>	380	79	123	171
Exceeded	17%	22%	20%	13%
Fully met	33%	30%	33%	35%
Met in the main	22%	18%	23%	24%
Partially met	19%	25%	15%	19%
Not met at all	6%	3%	7%	7%
Don't know	0%	1%	0%	0%
No prior expectations	3%	1%	3%	2%

Half of all OMIS users (50%) indicated that their expectations had been fully met or exceeded, and more than a fifth felt that they had been met in the main. However, this does leave a significant proportion (25%) whose initial expectations of the service were only partially met or not met at all. There is little difference in performance against expectations by overseas experience.

The table below provides analysis of the Quality Rating (including key individual elements of this measure) and the Overall Satisfaction measure by the extent to which OMIS participants' initial expectations were met.

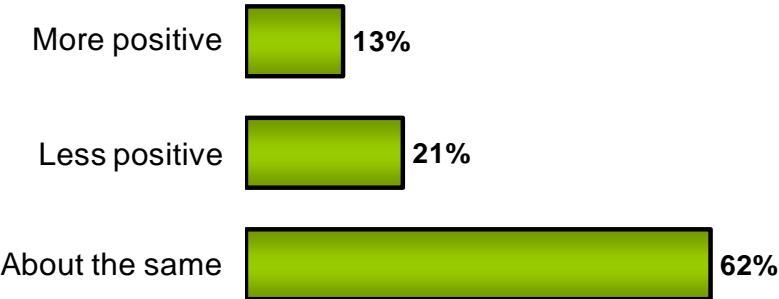
Figure 9.3.1.2 Quality & Satisfaction Ratings – By Expectations

	OMIS Total	Comparison with expectations				
		Exc-ceeded	Fully met	Met in main	Partially met	Not met at all
<i>Base: OMIS users</i>	380	64	126	84	73	22
Quality Rating (A09)	75%	94%	92%	78%	44%	26%
- <i>Quality & relevance of info & advice</i>	71%	95%	94%	71%	30%	10%
- <i>Quality & relevance of contacts</i>	62%	90%	82%	65%	19%	5%
Overall Satisfaction (B10)	69%	98%	97%	77%	11%	0%

Firms whose initial expectations are met or exceeded are significantly more likely to have a positive perception of the quality of the OMIS service and to be satisfied with the assistance they received. This demonstrates that if firms' expectations of the service are carefully managed to ensure that they do not have an unrealistic view of the likely benefits, this will ultimately lead to higher quality and satisfaction ratings.

Those OMIS users that received an analysis of the market and indicated that the support related to entering a new overseas market were asked how the potential opportunities identified in the report compared with what they had expected, with the following results.

Figure 9.3.1.3 How Picture in Report Compared with Expectations



Base: All OMIS commissioning report in relation to market entry (Base, Don't know) (109, 4%)

As seen above, almost two-thirds of all firms found the picture presented in the OMIS report to be similar to what they had expected.

This data has been used to calculate the 'Realistic Market Expectations' measure and the table below provides details of the results for this measure, both in total and by the number of years firms have been doing business overseas.

Figure 9.3.1.4 Measure RME – Realistic Market Expectations

	OMIS Total	When Started Exporting		
		Less than 2 years	2-10 years	More than 10 years
<i>Base: All OMIS receiving market analysis of a new market</i>	109	31	45	31
Firms with Realistic Market Expectations	75%	87%	64%	77%
95% confidence intervals	± 8%	± 12%	± 14%	± 15%

Overall, 75% of OMIS users felt that the picture in the report was either the same or more positive than expected and are therefore classified as having 'Realistic Market Expectations'.

The panel below provides further details of how the Realistic Market Expectations measure has been calculated for this survey (please note that the references in brackets refer to the question number, with the questionnaire appended to this report).

Realistic Market Expectations (OMIS)

Firms are classified as having ‘realistic market expectations’ if they indicate that...

- The potential opportunities identified in the OMIS report were ‘more positive’ or ‘about the same’ as they had expected (X10g)

Please note that this measure is based only on firms that received an OMIS report that contained an analysis of the market, and indicated that they used the service in relation to entering a new market.

The following table provides an analysis of the proportion of firms scoring against the Quality Rating and its constituent elements, by whether they found the report to be more positive, less positive or about the same as they had expected.

Figure 9.3.1.5 Quality Ratings by How Picture in Report Compared With Expectations

	OMIS report was...		
	More positive	About the same	Less positive
<i>Base: All OMIS receiving market entry support</i>	14	68	23
A09 – Quality Rating	97%	87%	47%
<i>Quality & relevance of info & advice</i>	100%	85%	39%
<i>Clarity & ease of understanding of info & advice</i>	100%	94%	61%
<i>Quality & relevance of any contacts provided</i>	92%	77%	33%
<i>Communications with staff at main access point</i>	86%	85%	57%
<i>Communications with embassy staff</i>	100%	88%	47%
<i>Objectivity of embassy staff</i>	100%	95%	45%
<i>Attitude & professionalism of embassy staff</i>	100%	95%	55%
<i>Organisation of the event</i>	100%	95%	100%

As seen above, those firms that felt the picture of the market presented in the OMIS report was more positive or similar to what they had initially expected tended to give higher quality ratings for all aspects of the service. This suggests that some firms are ‘shooting the messenger’ in the sense that they give poor quality scores simply because the OMIS appraisal of their market potential is worse than they had hoped (rather than the advice itself being poor).

9.3.2 Website Business Opportunities

Web Business Opportunities users were asked how the level of help and assistance provided by the staff at the overseas embassy or consulate about the opportunity had compared with their expectations. As detailed below, only around a third of firms (36%) indicated that their expectations had been fully met or exceeded in this respect, and a significant minority (30%) indicated that they had only been partially met or not met at all.

Figure 9.3.2.1 Level of Help and Assistance Provided by Staff at Embassy/Consulate - Comparison with Expectations

	Web Business Opportunities
<i>Base: Web Bus Opps users</i>	289
Exceeded	7%
Fully met	28%
Met in the main	27%
Partially met	17%
Not met at all	13%
No prior expectations	5%
Don't know	2%

Those Website Business Opportunities users whose expectations about the level of help provided by the post staff were only 'partially met' or 'not met at all' were asked for their reasons. As seen below, the most widespread criticisms of the service were the information not being specific enough and the lack of reply or follow-up to enquiries.

Figure 9.3.2.2 Level of Help and Assistance Provided by Staff at Embassy/Consulate - Reasons for Not Matching Expectations

Top Mentions (2%+)	Website Business Opportunities
<i>Base: All whose expectations were partially/not met</i>	88
Not enough specific information	39%
No follow-up/reply/lack of communication	27%
Information was inaccurate/lacked clarity/not up-to-date	8%
Post offered little support/help	3%
Couldn't proceed due to language barriers	2%
Not being given contact details for the contracting organisation	2%

Firms were also asked whether they expected to use the service again in future. Encouragingly, and despite the above issues, almost all Website Business Opportunities users plan to continue to use the service. This indicates that although the service can undoubtedly be improved (as detailed in Section 9.1.19) it still provides a valuable resource to internationalising firms.

Figure 9.3.2.3 Expect to Use UKTI Web Business Opportunities in Future

	Website Business Opportunities
<i>Base: Web Bus Opps</i>	289
Yes	85%
Maybe	12%
No	2%

9.3.3 Webinars

Webinar attendees were asked how the topics covered in the webinar had compared with their expectations. As detailed below, over three-quarters of firms indicated that their expectations had been at least met in the main, although a fifth (21%) indicated that they had only been partially met or not met at all.

Figure 9.3.3.1 Topics Covered in Webinars - Comparison with Expectations

	Webinars
<i>Base: Webinars</i>	80
Exceeded	6%
Fully met	29%
Met in the main	43%
Partially met	15%
Not met at all	6%
No prior expectations	1%

Webinar attendees were also asked how the level of detail provided in the webinar had compared with their expectations. Again, three-quarters felt their expectations had been at least met in the main but this still leaves a considerable proportion (23%) who indicated that they had only been partially met or not met at all.

Figure 9.3.3.2 Level of Detail Provided in Webinars - Comparison with Expectations

	Webinars
<i>Base: Webinars</i>	80
Exceeded	3%
Fully met	35%
Met in the main	39%
Partially met	16%
Not met at all	6%
No prior expectations	1%

Webinar attendees were also asked whether they expected to participate in any more UKTI webinars in future. Encouragingly, 18% of firms said they had already attended another webinar, and only 1% said they would not participate in any other webinars in further.

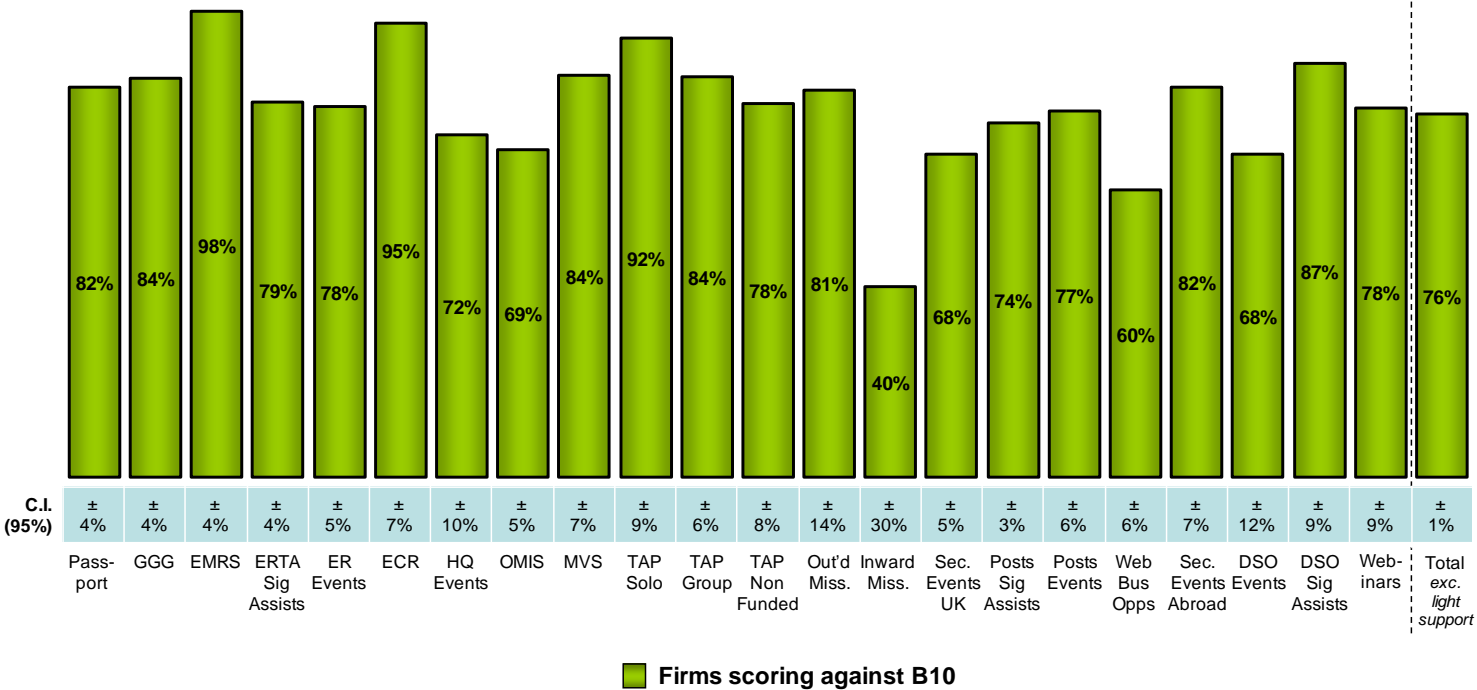
Figure 9.3.3.3 Expect to Participate in Any More UKTI Webinars in Future

	Webinars
<i>Base: Webinars</i>	80
Already have done	18%
Definitely will	61%
Probably will	20%
Probably will not	0%
Definitely will not	1%

9.4 Overall Satisfaction - Measure B10

Supported businesses were asked to rate their overall satisfaction with the support received. This analysis forms one of the key survey measures, namely 'Measure B10 – Overall satisfaction'.

Figure 9.4.1 Measure B10 – Overall Satisfaction



Base: All respondents (Base) - Passport (360), GGG (362), EMRS (40), ERTA (360), ER Events (305), ECR (41), HQ Events (71), OMIS (380), MVS (96), TAP Solo (38), TAP Group (150), TAP Non Funded (102), Outward Missions (32), Inward Missions (10), Sector Events UK (297), Posts Sig Assists (617), Posts Events (201), Website Bus Opps (289), Sector Events Abroad (104), DSO Events (59), DSO Sig Assists (60), Webinars (80), Total excl. light support (3714)

Overall, 76% of supported firms give a satisfaction rating of 4-5 out of 5 and therefore score against this measure. This figure is consistent with the 77% recorded a year ago, and is still below the UKTI target of 80%.

It is also worth noting that those firms that do not score against the measure do not tend to be *dissatisfied* with the support receive. Most of these firms give a score of 3 out of 5 (indifferent) and only 7% of all firms give a score of 1 or 2 out of 5 (very/fairly dissatisfied).

Satisfaction levels are particularly high for EMRS, ECR, and TAP Solo, but notably low for the Website Business Opportunities service and Inward Missions.

The panel below provides further details of how Measure B10 has been calculated for this survey (please note that the references in brackets refer to the question number, with the questionnaire appended to this report).

B10 – Overall Satisfaction

The overall satisfaction rating is the proportion of firms scoring ‘4’ or ‘5’ on a 5-point scale for...

- Thinking now about your total experience of <the support>, how would you rate your satisfaction overall? (B12)

As seen below, firms receiving support through the UK-based advisory services and tradeshows/missions display the highest satisfaction levels. There is a need to improve overall satisfaction for the other service types if UKTI is to meet its 80% target.

Figure 9.4.2 Measure B10 – Overall Satisfaction – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Proportion giving a rating of ‘4’ or ‘5’	81%	74%	74%	83%	72%

There are no major differences in satisfaction levels by firms’ export experience.

Figure 9.4.3 Measure B10 – Overall Satisfaction – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Proportion giving a rating of ‘4’ or ‘5’	78%	75%	76%

There is some indication that non-innovative firms display slightly higher satisfaction levels than their innovative counterparts, although this difference is only statistically significant when the tighter, alternative measure of innovation is used.

Figure 9.4.4 Measure B10 – Overall Satisfaction – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Proportion giving a rating of ‘4’ or ‘5’	76%	78%	75%	78%

As seen below, firms with substantial growth aspirations display higher satisfaction levels with the UKTI support.

Figure 9.4.5 Measure B10 – Overall Satisfaction – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Proportion giving a rating of '4' or '5'	73%	75%	78%

However, there is no statistically significant difference in satisfaction levels between firms that were 'born global' and those that started exporting at some point after they were established. There is also no significant difference in this respect between younger firms and those established for over 5 years.

Figure 9.4.6 Measure B10 – Overall Satisfaction – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Proportion giving a rating of '4' or '5'	74%	74%	78%	76%	77%

There are also no statistically significant differences in satisfaction levels by size of firm.

Figure 9.4.7 Measure B10 – Overall Satisfaction – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Proportion giving a rating of '4' or '5'	76%	77%	75%	78%

As seen below, firms with an annual turnover of more than £500 million report significantly higher satisfaction levels than smaller firms (in turnover terms).

Figure 9.4.8 Measure B10 – Overall Satisfaction – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Proportion giving a rating of '4' or '5'	75%	77%	78%	76%	89%

Levels of satisfaction are similar for firms accessing UKTI support in relation to high growth markets and those obtaining assistance with established markets.

Figure 9.4.9 Measure B10 – Overall Satisfaction – By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Proportion giving a rating of '4' or '5'	77%	79%

As seen below, there is also no significant difference in satisfaction levels by whether or not firms have a business plan or degree-educated senior management.

Figure 9.4.10 Measure B10 – Overall Satisfaction – By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Proportion giving a rating of '4' or '5'	76%	77%	75%	77%	74%

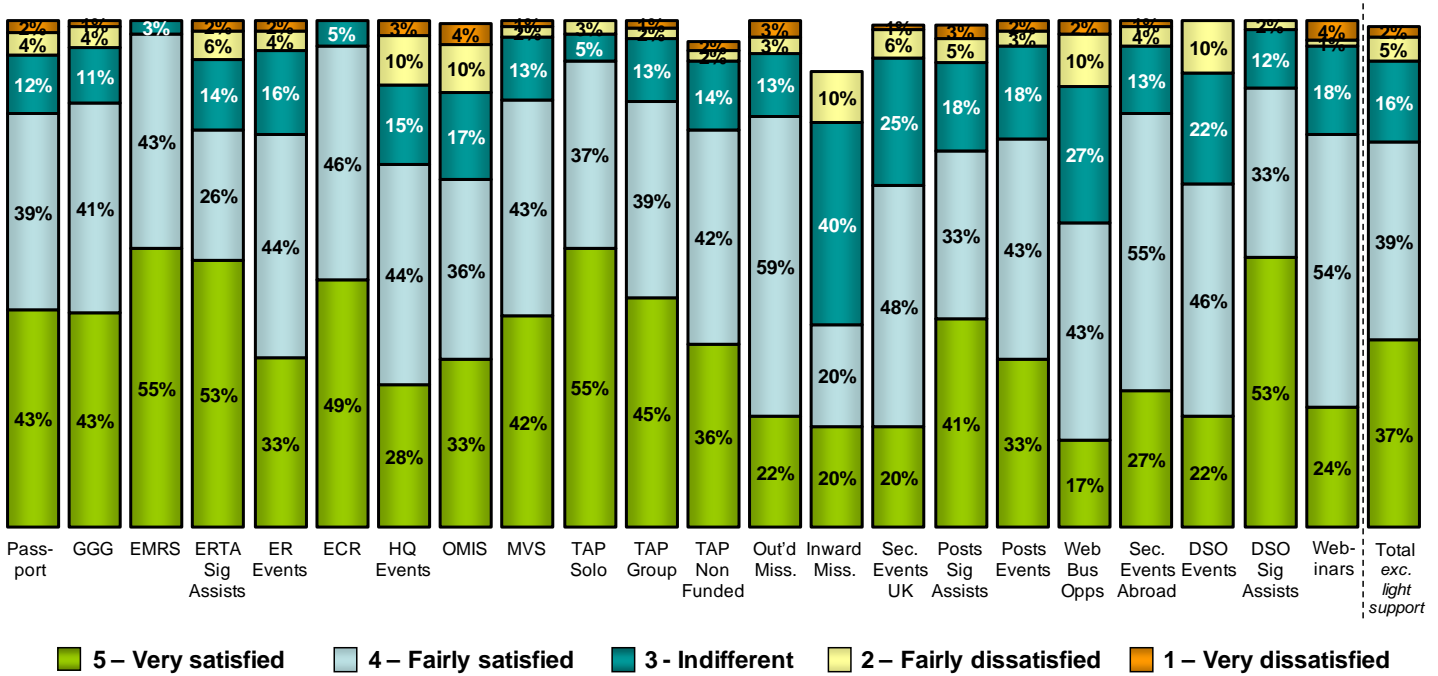
There are also no significant differences in satisfaction levels by market sector.

Figure 9.4.11 Measure B10 – Overall Satisfaction – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Proportion giving a rating of '4' or '5'	78%	76%	77%

The chart below provides a more detailed analysis of the distribution of the satisfaction ratings.

Figure 9.4.12 Overall Satisfaction



Base: All respondents (Base, Don't Know/Can't Remember) - Passport (360, 0%), GGG (362, 0%), EMRS (40, 0%), ERTA (360, 0%), ER Events (305, 0%), ECR (41, 0%), HQ Events (71, 0%), OMIS (380, 1%), MVS (96, 0%), TAP Solo (38, 0%), TAP Group (150, 0%), TAP Non Funded (102, 4%), Outward Missions (32, 0%), Inward Missions (10, 10%), Sector Events UK (297, 1%), Posts Sig Assists (617, 1%), Posts Events (201, 0%), Website Bus Opps (289, 0%), Sector Events Abroad (104, 0%), DSO Events (59, 0%), DSO Sig Assists (60, 0%), Webinars (80, 0%), Total excl. light support (3714, 0%)

Encouragingly, dissatisfaction levels are very low. In most cases where firms do not score against Measure B10 this is because they give an 'indifferent' score of 3 out of 5 for their overall satisfaction rather than a 'dissatisfied' score of 1 or 2.

OMIS, Sector Events UK, DSO Events and Webinar users that were dissatisfied with the support they received were asked to give their reasons.

As seen below, the most widespread criticism of the OMIS service related to the contacts provided being of poor quality. There were also criticisms of the information provided.

Figure 9.4.13 Reasons for Dissatisfaction - OMIS

Top Mentions (5%+)	OMIS
<i>Base: All dissatisfied firms</i>	52
Contacts were poor	17%
Information was of poor quality	12%
Was expecting more/didn't get much from them	8%
Communication/contact was poor	8%
Poor quality of report	8%
Have received nothing / no leads from contacts	8%
Information not specific to our needs	6%
Wasn't suitable for our type of business	6%
They were unhelpful / unsupportive	6%
There was no follow-up	6%
Slow response	6%
Received information that was inaccurate	6%

Only 20 of the 297 Sector Events UK attendees were dissatisfied, and the main reasons given by this group were that the information they received at the event was not suitable for their type of business and that there was a lack of follow-up (each mentioned by 3 respondents).

Just 6 of the 59 DSO Event attendees were dissatisfied and a variety of reasons were given for this including the information not being specific enough, a lack of follow up, poor contacts and not enough people attending the event.

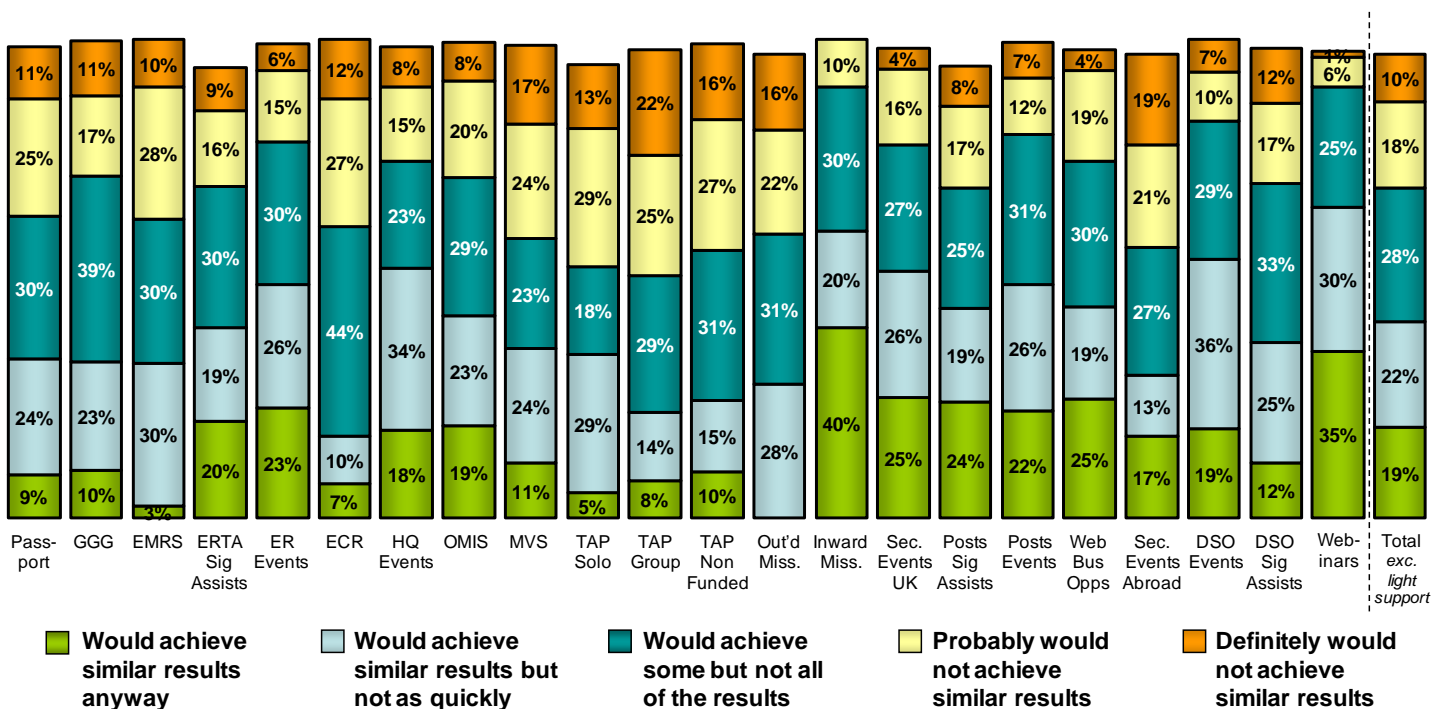
Only 4 of the 80 Webinar attendees interviewed were dissatisfied. The reasons given included the webinar content not being suitable/relevant for their business, the information being too general and poor communication.

10. Additionality

10.1 Generic Additionality

Supported firms were asked whether or not they felt that they would achieve similar results anyway had they not received the UKTI support in question. This has been used as the key indicator of additionality levels and is used to adjust the impact assessment of UKTI support (by identifying and excluding non-additional interventions).

Figure 10.1.1 Generic Additionality: Would Achieve Similar Results Anyway?



Base: All respondents (Base, None of these/Signposted only) - Passport (360, 1%), GGG (362, 0%), EMRS (40, 0%), ERTA (360, 6%), ER Events (305, 1%), ECR (41, 0%), HQ Events (71, 1%), OMIS (380, 1%), MVS (96, 1%), TAP Solo (38, 5%), TAP Group (150, 2%), TAP Non Funded (102, 1%), Outward Missions (32, 3%), Inward Missions (10, 0%), Sector Events UK (297, 2%), Posts Sig Assists (617, 6%), Posts Events (201, 0%), Website Bus Opps (289, 2%), Sector Events Abroad (104, 3%), DSO Events (59, 0%), DSO Sig Assists (60, 2%), Webinars (80, 3%), Total excl. light support (3714, 3%)

In a quarter of cases (28%) the UKTI support is classified as being 'fully additional' via this generic measure as firms feel that they probably or definitely would not achieve similar results without the support. Whilst most of the remainder are judged to be 'partially additional', almost a fifth of all supported firms (19%) believe that they would achieve similar outcomes anyway and the support is therefore classed as 'non-additional'. This proportion of non-additional interventions is significantly lower than the 23% seen a year ago (in PIMS 28-31).

Non-additionality levels are highest for Inward Missions and Webinars.

As detailed in the following table, support provided through tradeshows and missions is significantly more likely to be classified as fully additional.

Figure 10.1.2 Generic Additionality – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Fully additional	27%	26%	23%	44%	18%
Partially additional	54%	49%	54%	48%	62%
Non-additional	16%	23%	23%	9%	19%

It also seems that the additionality of the support declines the longer that firms have been exporting, which might imply that experienced exporters have access to more resources or networks that would enable them to achieve the same outcomes if the UKTI support was not available.

Figure 10.1.3 Generic Additionality – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Fully additional	32%	29%	24%
Partially additional	49%	50%	56%
Non-additional	17%	20%	20%

Innovative firms are more likely to judge the support to be fully additional, although this difference is not significant when the tighter definition of innovation is used.

Figure 10.1.4 Generic Additionality – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Fully additional	28%	24%	28%	27%
Partially additional	52%	54%	52%	52%
Non-additional	19%	22%	19%	20%

There are no significant differences in additionality by firms' growth aspirations.

Figure 10.1.5 Generic Additionality – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Fully additional	27%	29%	28%
Partially additional	52%	52%	51%
Non-additional	19%	18%	20%

There is also no difference in additionality by whether firms were ‘born global’ or not and, as a whole, there is no significant difference between younger firms and those established for more than 5 years.

Figure 10.1.6 Generic Additionality – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Fully additional	32%	29%	29%	29%	27%
Partially additional	48%	48%	50%	49%	53%
Non-additional	19%	21%	20%	21%	19%

However, there is a clear relationship between size of firm and the additionality of the UKTI support. Smaller firms are considerably more likely to judge the support to be fully additional, suggesting that UKTI plays a more critical role in the development of small businesses as they presumably have less resources or information sources at their disposal.

Figure 10.1.7 Generic Additionality – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Fully additional	32%	26%	24%	19%
Partially additional	49%	54%	55%	58%
Non-additional	19%	19%	21%	22%

Reflecting the results by employee numbers, firms with a lower annual turnover are significantly more likely to describe the support as ‘fully additional’ than those with a higher turnover.

Figure 10.1.8 Generic Additionality – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Fully additional	32%	30%	28%	21%	23%
Partially additional	48%	53%	54%	52%	55%
Non-additional	19%	16%	17%	26%	20%

There are no significant differences in additionality between firms focussing on high growth or established markets.

Figure 10.1.9 Generic Additionality – By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Fully additional	28%	30%
Partially additional	54%	51%
Non-additional	17%	18%

Interestingly, firms that do not have a current business plan are more inclined to describe the support as 'fully additional' (although it should be noted that this difference is only statistically significant compared to firms whose business plan contains overseas targets).

Figure 10.1.10 Generic Additionality – By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Fully additional	27%	29%	33%	28%	31%
Partially additional	54%	50%	48%	52%	48%
Non-additional	19%	21%	19%	18%	20%

There are no major differences in additionality levels by the market sector in which supported firms operate.

Figure 10.1.11 Generic Additionality – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Fully additional	29%	27%	30%
Partially additional	51%	52%	53%
Non-additional	19%	20%	17%

10.2 Activity Additionality

Where relevant, supported businesses were asked whether they would still have gone ahead with a particular action (e.g. attending the trade fair) had the UKTI support not been available. Please note that, with the exception of OMIS, these questions were only asked in one quarter (PIMS 34) and therefore base sizes can be very low for some services. In cases where the base is less than 10 the results are displayed as the number of respondents rather than as percentages.

As detailed below, the majority of OMIS, EMRS & ECR users would probably or definitely not have undertaken a similar activity had the UKTI support not been available.

Figure 10.2.1 Whether Would Have Commissioned Something Similar From External Source if UKTI Support Was Not Available (OMIS, EMRS & ECR)

	Sample Group		
	OMIS	EMRS	ECR
<i>Base</i>	380	10	11
Whether firm would have commissioned similar support elsewhere			
Yes - definitely	18%	0%	0%
Yes - probably	23%	20%	27%
Probably not	32%	40%	36%
Definitely not	25%	40%	27%
Don't know	3%	0%	9%

Just over half of the MVS users indicated that they definitely or probably would have visited the same market in the same broad timeframe even if they had not been able to access the UKTI support. As there was only 1 Outward Mission participant in PIMS 34, the base is too low to draw any conclusion.

Figure 10.2.2 Whether Would Still Have Visited Market in Same Broad Timeframe if UKTI Support Not Available (MVS & Outward Missions)

	Sample Group	
	MVS	Outward Missions
<i>Base</i>	15	1
Whether firm would have visited market in same timeframe		
Yes - definitely	40%	0/1
Yes - probably	13%	0/1
Probably not	20%	0/1
Definitely not	27%	0/1
Don't know	0%	1/1

The majority of TAP Solo and TAP Non-Funded participants (80% and 71% respectively) indicated that they would still have exhibited at the same trade fair even if the TAP support had not been available. This proportion falls to just 43% for TAP Group, although it is interesting to note that most of these firms believe that they would have attended with the same or similar group of companies.

Figure 10.2.3 Whether Would Still Have Exhibited at the Same/Similar Trade Fair if Had Not Received TAP Support (TAP Solo, TAP Group & TAP Non-Funded)

	Sample Group		
	TAP Solo	TAP Group	TAP Non Funded
<i>Base</i>	10	40	17
Whether firm would still have exhibited at same/similar trade fair			
Yes - definitely	30%	23%	53%
Yes - probably	50%	20%	18%
Probably not	20%	23%	12%
Definitely not	0%	28%	18%
Don't know	0%	8%	0%
Whether firm would have gone with same/similar group of companies			
Yes - definitely	-	18%	-
Yes - probably	-	15%	-
Probably not	-	8%	-
Definitely not	-	0%	-
Don't know	-	3%	-
Would not have exhibited at fair	-	50%	-
Don't know if would have exhibited	-	8%	-

For Passport, GGG and ERTA users, the majority of firms feel that similar advice or support would not have been available from a non-UKTI source.

Figure 10.2.4 Whether Would Have Obtained Similar Advice from Another Source if UKTI Support Not Available (Passport, GGG & ERTA Sig Assists)

	Sample Group		
	Passport	GGG	ERTA Sig Assists
<i>Base</i>	90	92	91
Whether firm would <u>have been able to obtain</u> similar advice elsewhere			
Yes	14%	22%	16%
Maybe	19%	12%	19%
No	62%	59%	54%
Don't know	4%	8%	11%
Whether firm would <u>actually have obtained</u> this advice elsewhere			
Yes	10%	11%	15%
Maybe	8%	4%	8%
No	13%	17%	10%
Don't know	2%	1%	2%
Not able to obtain similar advice	62%	59%	54%
Don't know if able to obtain similar advice	4%	8%	11%

There is an even split among webinar participants between those believing that they could have obtained similar information elsewhere and those not believing this to be the case.

Figure 10.2.5 Whether Would Have Obtained Similar Information from Another Source if UKTI Webinar Not Available (Webinars)

	Webinars
<i>Base</i>	40
Whether firm would have been able to obtain similar information elsewhere	
Yes	28%
Maybe	35%
No	28%
Don't know	10%

The support has then been classified as 'additional' based on whether or not firms would have undertaken similar action in the absence of the UKTI support, as detailed below.

Activity Additionality

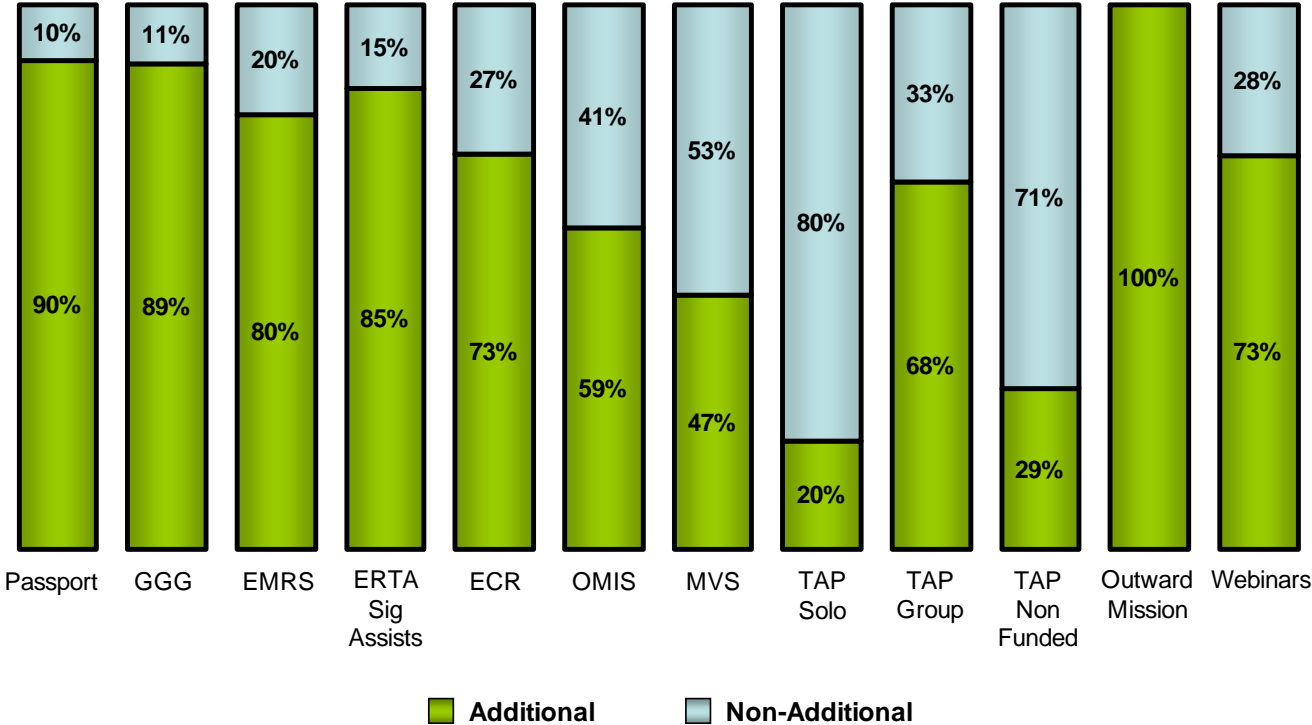
The support is classified as 'non-additional' in the following circumstances...

- **OMIS, EMRS & ECR:** Firms indicating they would 'probably' or 'definitely' have commissioned something similar from an external source
- **TAP Solo & TAP Non Funded:** Firms indicating they would 'probably' or 'definitely' have exhibited at a similar trade fair
- **TAP Group:** Firms indicating they would 'probably' or 'definitely' have exhibited at a similar trade and would have attended with a similar delegation
- **Passport, GGG & ERTA:** Firms indicating they would have been able to obtain similar support and would have actually done so
- **Outward Mission:** Firms indicating they would 'probably' or 'definitely' have visited the market in the same broad time frame
- **MVS:**
 - *Attended alone:* Firms indicating that they would 'probably' or 'definitely' have visited the market in the same broad time frame
 - *Attended with group:* Firms indicating that they would 'probably' or 'definitely' have visited the market and gone with a similar delegation
- **Webinars:** Firms indicating that they would have been able to obtain similar information from a non-UKTI source

In all other cases the support is classified as 'additional'.

The chart below provides details of the proportion of firms where the support is classified as 'additional' by this measure of activity additionality.

Figure 10.2.5 Activity Additionality



Base: PIMS 32-35 OMIS, PIMS 34 Others (Base) – Passport (90), GGG (92), EMRS (10), ERTA (91), ECR (11), OMIS (380), MVS (15), TAP Solo (10), TAP Group (40), TAP Non-Funded (17), Outward Mission (1), Webinars (40)

The vast majority of Passport, GGG, EMRS, ERTA Significant Assists, ECR, OMIS and TAP Group interventions are classified as being additional by this measure of activity additionality. Reaction is more mixed for MVS, and most TAP Non-Funded and TAP Solo participants judge the support to be non-additional. Once again the low base sizes for many services should be taken into account when interpreting this data, particularly for Outward Missions, where additionality stands at 100% but is only based on 1 participant.

Micro SMEs and those with under 2 years export experience are more likely to indicate that they would not have taken a similar action without UKTI’s assistance (and the support is therefore classified as ‘additional’ by this measure of activity additionality). This reflects the results seen when the generic measure of additionality is employed, and suggests that these types of firms have fewer alternatives available to them when it comes to getting information on overseas markets or attending overseas visits, and hence UKTI can play a more vital role in their development.

There are no significant differences in activity additionality by whether or not firms are innovative, have a business plan, or have degree-level educated members of the senior management team.

The table below compares activity additionality with the generic additionality classification (i.e. the extent to which firms would have achieved similar business outcomes anyway).

Figure 10.2.6 Activity Additionality – By Generic Additionality

Activity Additionality	Generic Additionality		
	Fully additional	Partially additional	Non additional
<i>Base: All in relevant schemes</i>	247	417	132
Additional	74%	64%	57%
Non-additional	26%	37%	43%

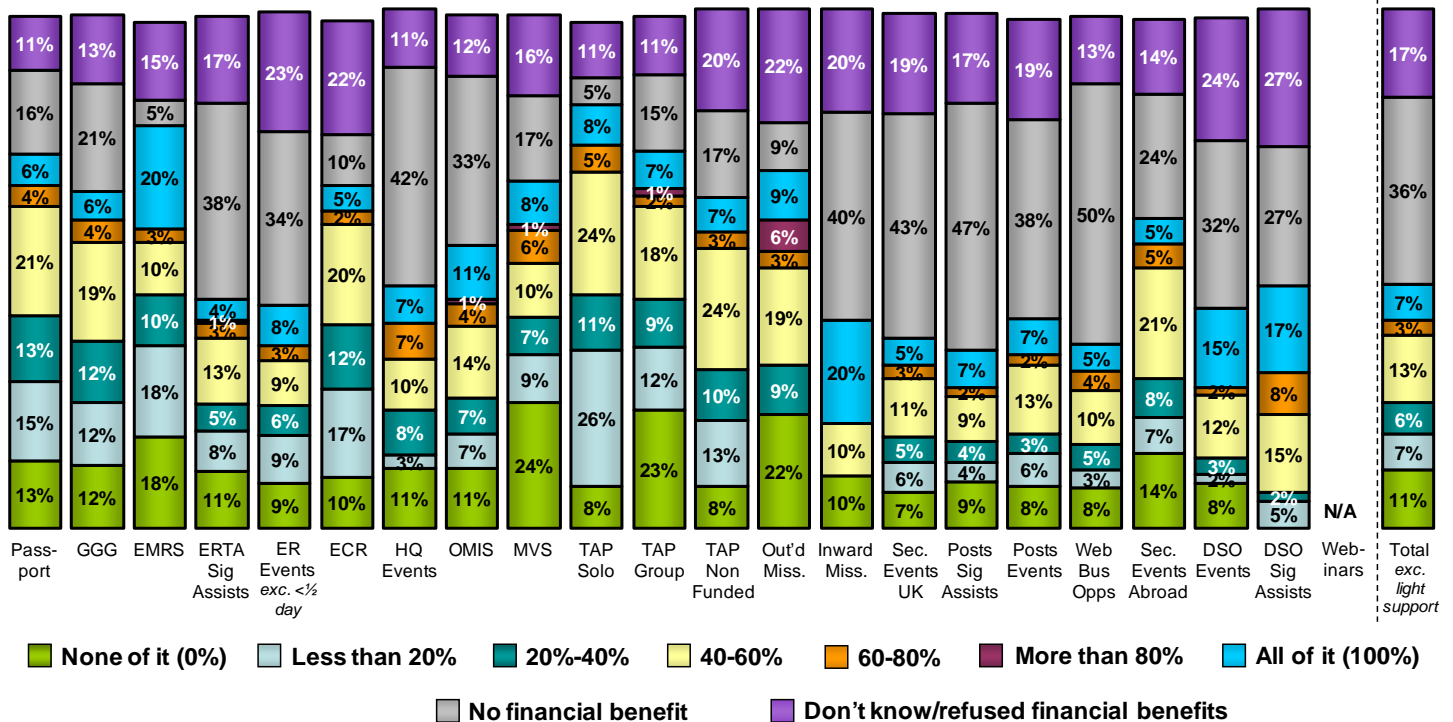
There is some degree of correlation between these two measures of additionality, although the relationship is perhaps not as strong as might be expected. Overall, 26% of the firms classifying the support as fully additional (i.e. they would not have achieved similar business outcomes without UKTI) actually claim that they would have gone ahead with a similar action without UKTI assistance.

This suggests that even though these firms would have commissioned something similar or visited the same market/event, they would not have been able to achieve the same *business outcomes* without UKTI’s help. This picture is consistent with the findings from the PIMS Non-User surveys, which indicate that firms receiving non-UKTI export assistance report substantially lower impact scores than UKTI support recipients.

10.3 Extent to Which Financial Benefits Are Attributable

Supported firms were asked to consider the total financial benefit of the UKTI support they had received, and indicate the proportion of this amount that they would expect to have realised anyway within the same timeframe had they not received the support in question. Please note that those firms attending ER Events lasting less than half a day were not asked this question and have been excluded from the analysis.

Figure 10.3.1 Proportion of Financial Benefit That Would Be Realised Anyway



Base: All except Webinars & short ER Events (Base, Don't know/Refused % attributable) - Passport (360, 1%), GGG (362, 1%), EMRS (40, 3%), ERTA (360, 1%), ER Events (excl. <1/2 day) (140, 1%), ECR (41, 2%), HQ Events (71, 0%), OMIS (380, 1%), MVS (96, 1%), TAP Solo (38, 3%), TAP Group (150, 1%), TAP Non Funded (102, 0%), Outward Missions (32, 0%), Inward Missions (10, 0%), Sector Events UK (297, 1%), Posts Sig Assists (617, 1%), Posts Events (201, 2%), Website Bus Opps (289, 1%), Sector Events Abroad (104, 2%), DSO Events (59, 2%), DSO Sig Assists (60, 0%), Total excl. light support (3714, 1%)

Overall, 39% of supported firms experienced some level of financial benefit from the support and indicated that at least some of this financial gain would *not* have been realised without the UKTI support. These interventions can therefore be classed as additional by this measure of financial additionality.

11% of firms reported full additionality (i.e. they would have received none of the financial benefits had they not received the support). While only a small minority (7%) of supported firms feel that they would have received the full financial benefits irrespective of the UKTI support, it should be noted that a further 36% of firms indicated that they have not received (and do not expect to receive) any financial benefits at all from the support.

The following table provides details of the proportion of the financial benefit that firms would have received anyway, analysed by their generic additionality classification (i.e. the extent to which they feel they would have achieved similar business outcomes anyway without the UKTI assistance).

Figure 10.3.2 Proportion of Financial Benefit That Would Be Realised Anyway – By Generic Additionality

	Generic Additionality		
	Fully additional	Partially additional	Non additional
<i>Base: Exc. light support</i>	1060	1979	648
None of it (0%)	23%	8%	-
Less than 20%	13%	7%	-
20-40%	10%	6%	-
40-60%	14%	17%	-
60-80%	2%	5%	-
More than 80%	0%	1%	-
All of it (100%)	4%	12%	-
No £ benefit	13%	22%	100%
Don't know/refused % attributable	1%	2%	-
Don't know/refused £ benefit	20%	22%	-

As might be expected, there is a correlation between generic additionality and the proportion of any financial benefit that firms feel they would have realised anyway. A quarter (23%) of fully additional firms indicated that they would have achieved none of the financial benefit without the UKTI support, compared to only 8% of partially additional firms.

Please note that non-additional firms are not asked the financial benefit questions and are automatically classified as having zero financial benefit, on the basis that they would not be able to score against Measure A49 in any case (due to the additionality adjustments used in the calculation of this measure).

As seen below, financial additionality is highest for tradeshows and missions, with over half of this group (62%) anticipating some level of financial benefit and indicating that at least part of this would not have been realised without the UKTI support.

Figure 10.3.3 Proportion of Financial Benefit That Would Be Realised Anyway
– By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
None of it (0%)	11%	9%	8%	18%	7%
Less than 20%	10%	4%	6%	12%	3%
20-40%	7%	4%	5%	9%	2%
40-60%	15%	10%	12%	18%	12%
60-80%	3%	2%	3%	4%	4%
More than 80%	0%	0%	0%	1%	0%
All of it (100%)	5%	8%	6%	8%	15%
No £ benefit	31%	44%	39%	15%	34%
Don't know/refused % attributable	1%	1%	1%	1%	1%
Don't know/refused £ benefit	16%	16%	19%	15%	23%

There is little difference in the level of financial additionality by the length of time that firms have been doing business overseas.

Figure 10.3.4 Proportion of Financial Benefit That Would Be Realised Anyway
– By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
None of it (0%)	12%	12%	8%
Less than 20%	10%	7%	6%
20-40%	5%	6%	6%
40-60%	12%	14%	13%
60-80%	2%	3%	3%
More than 80%	0%	0%	0%
All of it (100%)	6%	6%	8%
No £ benefit	33%	34%	38%
Don't know/refused % attributable	1%	1%	1%
Don't know/refused £ benefit	19%	16%	16%

11. Impacts & Outcomes

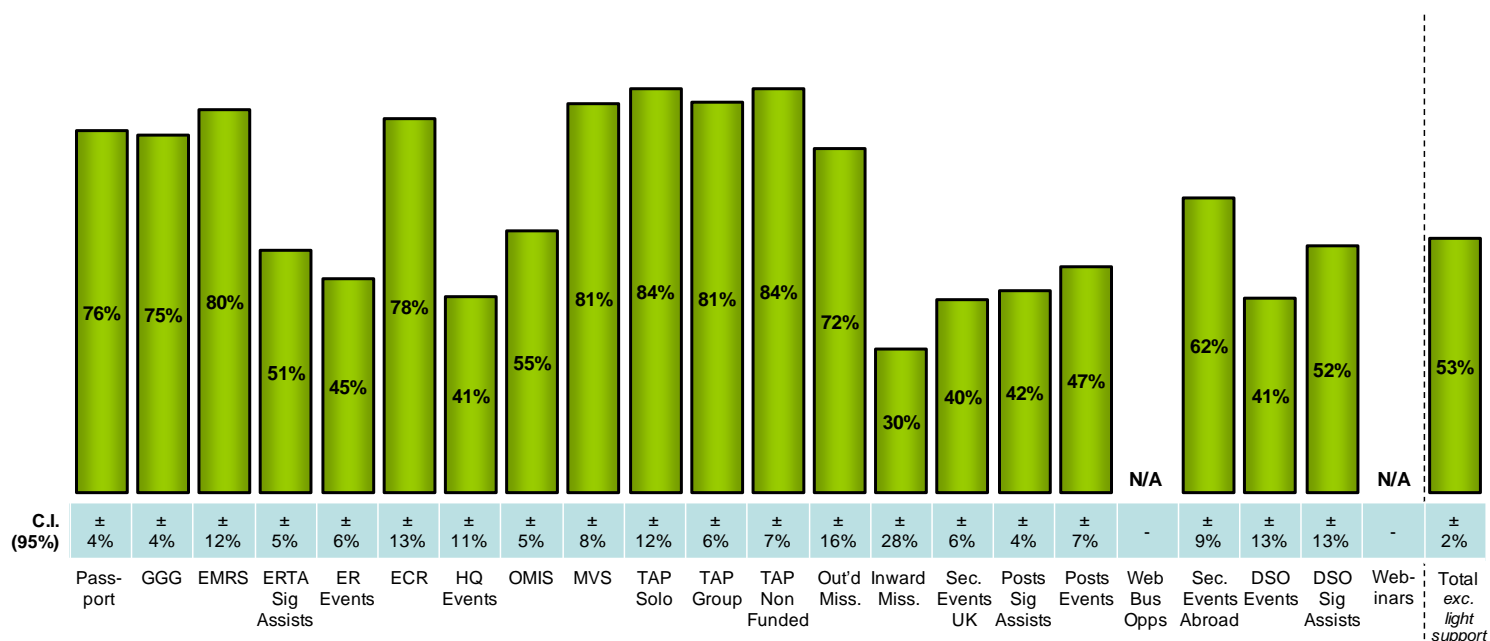
This section of the report provides details of the impact of the UKTI support on assisted firms. Please note that in the main PIMS interviews firms are asked to report *anticipated* outcomes and not just outcomes that have already been realised. The PIMS follow-up surveys (conducted 9-12 months after the initial PIMS interview) provide further evidence on the actual outcomes experienced to date and how these compare with firms' initial expectations.

11.1 Improved Business Performance Measure

11.1.1 Summary

The proportion of firms assisted by UKTI that improve their business performance is captured via the 'Improved Business Performance' measure. The chart below shows the proportion of supported businesses that score against this measure, along with the associated confidence intervals. Please note that users of the Website Business Opportunities service and Webinar attendees are excluded from this measure.

Figure 11.1.1.1 Improved Business Performance Measure



■ Firms Improving Their Business Performance

Base: All respondents exc. Web Business Opportunities & Webinars (Base) - Passport (360), GGG (362), EMRS (40), ERTA (360), ER Events (305), ECR (41), HQ Events (71), OMIS (380), MVS (96), TAP Solo (38), TAP Group (150), TAP Non Funded (102), Outward Missions (32), Inward Missions (10), Sector Events UK (297), Posts Sig Assists (617), Posts Events (201), Sector Events Abroad (104), DSO Events (59), DSO Sig Assists (60), Total excl. light support (3714)

Just over half (53%) of all supported firms are expecting to improve their business performance as a result of the UKTI assistance, and therefore score against the Improved Business Performance measure.

The different UKTI services vary considerably in both the intensity and type of support provided and, as a result, the proportion of firms improving their performance differs widely. At least three-quarters of Passport, GGG, EMRS, ECR, MVS and TAP participants score against the measure. However, the proportion of firms improving their performance is significantly lower for most of the event and 'significant assist' categories of support.

The Improved Business Performance measure (previously the PSA measure) was initially developed by academics at the University of Reading, and has subsequently been refined to make the component questions clearer and more suitable for use in the context of a telephone interview. The panel below provides details of how this measure has been calculated (please note that the references in brackets refer to the question number, with the questionnaire appended to this report).

Improved Business Performance Measure

Firms are classified as improving their business performance if they...

- Expect that in 5 years time the support will have had a positive impact on their annual profits (E21e)
- And, expect a positive impact on their productivity (in terms of sales per employee) (E21c)
- And, have or expect to increase their sales, win new orders or be invited to tender or quote for work (D8a/b)

As detailed above, to score against this measure the UKTI support has to result in increased profits and increased productivity and additional revenues. It should be noted that many UKTI clients who do not score against this measure still report other softer, but significant, business benefits (e.g. access to useful contacts, increased profile/credibility, improved knowledge of overseas markets, confidence to expand overseas, etc).

The Improved Business Performance measure has been calculated separately for each broad type of UKTI support. As seen below, firms attending tradeshows and missions are, by some distance, the most likely to improve their business performance as a result of the UKTI support.

Figure 11.1.1.2 Improved Business Performance Measure – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Proportion improving performance	59%	45%	46%	82%	42%

When looking at the likelihood of firms improving their business performance as a result of the UKTI support, there are no clear or consistent differences by the length of time they have been exporting.

Figure 11.1.1.3 Improved Business Performance Measure – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Proportion improving performance	52%	55%	53%

Innovative firms are more likely to score against this measure than their non-innovative counterparts.

Figure 11.1.1.4 Improved Business Performance Measure – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Proportion improving performance	55%	44%	55%	51%

Firms that plan to grow over the next 5 years are also more likely to score against this measure, with this particularly true of those anticipating ‘substantial’ growth. This suggests that UKTI support can play an important role in helping firms achieve their growth aspirations.

Figure 11.1.1.5 Improved Business Performance Measure – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Proportion improving performance	41%	52%	58%

There is no statistically significant difference between firms that were 'born global' and those that started exporting at some point after they were established. However, as a whole, young firms are more likely to score against this measure than those that have been trading for more than 5 years.

Figure 11.1.1.6 Improved Business Performance Measure – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Proportion improving performance	61%	59%	55%	57%	53%

It is clear from the analysis below that UKTI assistance is less likely to have a significant impact on the business performance of larger firms with 250 or more employees. However, it is still the case that two-fifths of these firms do score against this measure.

Figure 11.1.1.7 Improved Business Performance Measure – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Proportion improving performance	56%	55%	54%	40%

Similarly, UKTI assistance is less likely to have a significant impact on the business performance of firms with an annual turnover of £25million or more.

Figure 11.1.1.8 Improved Business Performance Measure – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Proportion improving performance	56%	55%	57%	47%	49%

Firms receiving support in relation to established markets are more likely to improve their business performance than those accessing support about high growth markets, perhaps because the latter represent more challenging targets and therefore the chances of success are reduced.

Figure 11.1.1.9 Improved Business Performance Measure
– By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Proportion improving performance	54%	58%

Firms with a current business plan that contains overseas targets are most likely to improve their business performance following the UKTI support.

Figure 11.1.1.10 Improved Business Performance Measure
– By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Proportion improving performance	59%	44%	51%	56%	55%

As seen below, firms in the production sector are more likely to improve their performance than service sector firms.

Figure 11.1.1.11 Improved Business Performance Measure – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Proportion improving performance	56%	52%	51%

11.1.2 Constituent Elements

As detailed previously, firms score against the Improved Business Performance measure if they indicate that the support will have a positive impact on their productivity in 5 years time and a positive impact on their profitability and they have or expect to increase their sales, win new orders or be invited to tender or quote for new work.

The table below summarises the proportion of firms anticipating a lasting impact on the profit levels and the proportion expecting increased sales/orders. Please note that this level of data is not available for the 'productivity' element of the measure, as this question was only asked to those that had already qualified for the other constituent parts of the measure (i.e. it was not asked to those firms that would not be able to score against the Improved Business Performance measure).

Figure 11.1.2.1 Improved Business Performance Measure – Constituent Elements

	Total exc. light support	Pass-port	GGG	EMRS	ERTA Sig. Assists	ER Events	ECR
<i>Base</i>	3714	360	362	40	360	305	41
Positive impact on annual profit	60%	83%	83%	90%	57%	61%	93%
Increase sales/orders/tenders	62%	84%	85%	95%	56%	50%	88%

	HQ Events	OMIS	MVS	TAP SOLO	TAP Group	TAP Non Funded	Out'd Miss.	In'd Miss.
<i>Base</i>	71	380	96	38	150	102	32	10
Positive impact on annual profit	44%	63%	88%	92%	87%	91%	81%	30%
Increase sales/orders/tenders	48%	69%	86%	92%	91%	87%	88%	40%

	Sector Events UK	Posts Sig. Assists	Posts Events	Web Bus Opps	Sector Events Abroad	DSO Events	DSO Sig. Assists	Webinars
<i>Base</i>	297	617	201	-	104	59	60	-
Positive impact on annual profit	47%	48%	55%	-	69%	47%	57%	-
Increase sales/orders/tenders	51%	51%	59%	-	73%	53%	63%	-

Overall, firms are equally likely to anticipate an increase in annual profits as they are an increase to additional sales or orders.

As seen below, firms attending tradeshows and missions are most likely to benefit from each of the individual elements of the Improved Business Performance measure.

Figure 11.1.2.2 Improved Business Performance Measure – Constituent Elements – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Positive impact on annual profit	66%	51%	53%	89%	47%
Increase sales/orders/tenders	66%	54%	53%	89%	53%

There is no relationship between export experience and the likelihood of seeing additional profit or additional sales as a result of UKTI support.

Figure 11.1.2.3 Improved Business Performance Measure – Constituent Elements – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Positive impact on annual profit	58%	60%	60%
Increase sales/orders/tenders	59%	61%	62%

11.1.3 Improved Business Performance Measure by Key Quality Ratings

Users of each UKTI service have been separated into 3 groups depending on the ratings they gave for the service aspects relating to the quality and relevance of contacts and the quality and relevance of information/advice. The analysis below shows the likelihood of firms in each of these groups scoring against the Improved Business Performance measure. Please note that the individual areas that firms were asked to rate differed across the various services, but all firms were asked to provide ratings relating to at least one of the above areas.

Figure 11.1.3.1 Improved Business Performance Measure – By Key Quality Ratings

<i>Percentage of firms scoring against the Improved Business Performance Measure</i>	Total	Ratings related to the quality & relevance of contacts and info/advice		
		4-5 out of 5	3 out of 5	1-2 out of 5
Passport	76%	79%	59%	23%
GGG	75%	80%	45%	25%
EMRS	80%	81%	100%	0%
ERTA Sig. Assists	51%	58%	39%	17%
ER Events	54%	53%	40%	19%
ECR	78%	81%	50%	0%
HQ Events	41%	55%	59%	0%
OMIS	55%	64%	33%	9%
MVS	81%	84%	55%	100%
TAP SOLO	84%	83%	100%	0%
TAP Group	81%	86%	67%	40%
TAP Non-Funded	84%	85%	79%	100%
Outward Missions	72%	84%	54%	0%
Inward Missions	30%	67%	20%	0%
Sector Events UK	40%	55%	29%	3%
Posts Sig. Assists	42%	51%	28%	13%
Posts Events	47%	56%	42%	17%
Sector Events Abroad	62%	70%	41%	38%
DSO Events	41%	61%	25%	0%
DSO Sig. Assists	52%	65%	31%	0%

It is clear from the above table that there is a strong correlation between the quality of the support and the likelihood of firms scoring against the Improved Business Performance measure (with this correlation evident for the vast majority of services).

This analysis demonstrates what can be achieved if the quality and relevance of the contacts and information provided by UKTI is improved. For example, 79% of Passport participants that gave a rating of 4-5 for any of the key quality aspects scored against the Improved Business Performance measure, compared to only 23% of those giving a rating of just 1-2 for all of these quality aspects.

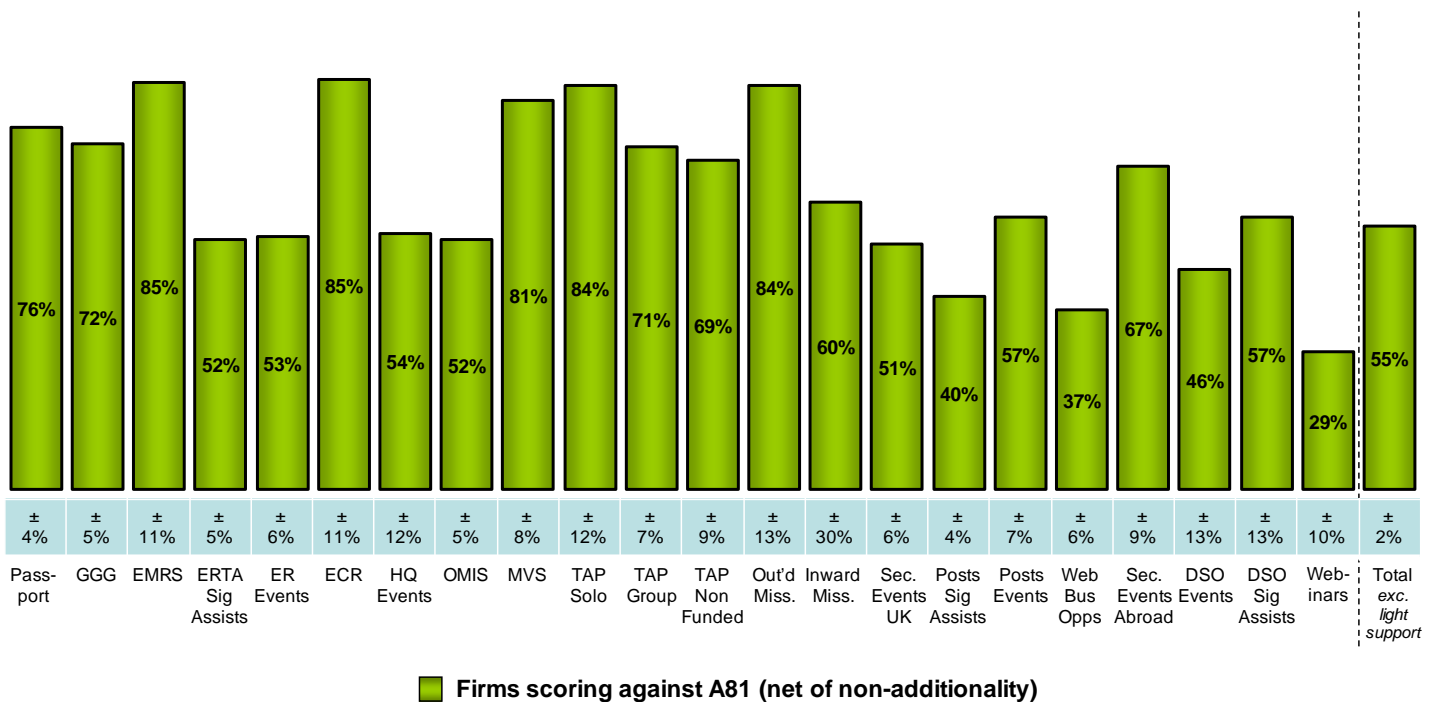
Please note that the remaining measures reported in this section are **adjusted for additionality**. In most cases the generic measure of additionality is used (please refer to Section 10.1 for details), and firms indicating that they would 'achieve similar results anyway' do not score against the measure. However, at times an alternative approach has been adopted, such as in the calculation of Measure A49 - £ Estimated Additional Profit. Full details of the construction of each measure are provided throughout this section.

11.2 Increased Skills - Measure A81

11.2.1 Summary

The chart below shows the proportion of supported businesses that anticipate benefiting from the UKTI support through increasing their skills, along with the associated confidence intervals. This analysis forms one of the key survey measures, namely 'Measure A81 – Increased skills'.

Figure 11.2.1.1 Measure A81 Increased Skills



Base: All respondents (Base) - Passport (360), GGG (362), EMRS (40), ERTA (360), ER Events (305), ECR (41), HQ Events (71), OMIS (380), MVS (96), TAP Solo (38), TAP Group (150), TAP Non Funded (102), Outward Missions (32), Inward Missions (10), Sector Events UK (297), Posts Sig Assists (617), Posts Events (201), Website Bus Opps (289), Sector Events Abroad (104), DSO Events (59), DSO Sig Assists (60), Webinars (80), Total excl. light support (3714)

Over half of all supported firms (55%) are judged to increase their skills as a result of the assistance they have received. The proportion of firms scoring against this measure does vary depending on the type of support received and, as might be expected, schemes that are aimed at capability building (such as EMRS, Passport, ECR and GGG) tend to score well.

Many of the UKTI services that involve attending overseas visits/events (such as MVS, TAP, Outward Missions and Sector Events Abroad) are also more likely to result in increased skills, perhaps due to the knowledge/idea sharing opportunities these visits provide through contact with other delegates, competitors and potential customers or partners.

The panel below provides further details of how Measure A81 has been calculated for this survey (please note that the references in brackets refer to the question number, with the questionnaire appended to this report).

A81 – Increased Skills

Firms are classified as indicating increased skills if they feel that they have or will ‘to a significant extent’ (i.e. scored ‘4’ or ‘5’ for)...

- Improve their knowledge of the competitive environment in an overseas market (D2i)
- Qr, gain new ideas about products, services, techniques or technologies (D2k)
- Qr, improve their overseas marketing strategy (D2o)
- Qr, improve their marketing research skills (D2u) – *EMRS only*

In each case net of non-additionality, so firms indicating that they ‘would achieve similar results anyway’ (D10) do not score against the measure.

Measure A81 has also been calculated separately for each broad type of UKTI support. As seen below, firms attending tradeshows and missions are most likely to increase their skills, followed by those accessing UK-based advisory services.

Figure 11.2.1.2 Measure A81 Increased Skills – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Proportion increasing skills, net of non-additionality	60%	43%	55%	74%	45%

As is seen with many of the impact measures, well established exporters are less likely to increase their skills as a result of the support. This suggests that less experienced exporters may have greater knowledge or capability gaps that UKTI assistance can help to overcome.

Figure 11.2.1.3 Measure A81 Increased Skills – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Proportion increasing skills, net of non-additionality	60%	55%	52%

Innovative firms are also significantly more likely to increase their skills following the UKTI support.

Figure 11.2.1.4 Measure A81 Increased Skills – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Proportion increasing skills, net of non-additionality	56%	48%	57%	52%

There is no statistically significant difference in results to this measure by firms' growth objectives. .

Figure 11.2.1.5 Measure A81 Increased Skills – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Proportion increasing skills, net of non-additionality	51%	55%	57%

Interestingly, young firms that were not 'born global' are more likely to increase their skills as a result of the support than those that were, perhaps because they have a greater skills gap due to their inexperience overseas.

Figure 11.2.1.6 Measure A81 Increased Skills – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Proportion increasing skills, net of non-additionality	54%	54%	60%	57%	54%

There is also a relationship between business size and increased skills, with smaller firms most likely to score against this measure.

Figure 11.2.1.7 Measure A81 Increased Skills – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Proportion increasing skills, net of non-additionality	59%	53%	49%	49%

Similarly, there is a relationship between turnover and increased skills, with smaller firms more likely to benefit.

Figure 11.2.1.8 Measure A81 Increased Skills – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Proportion increasing skills, net of non-additionality	60%	56%	55%	46%	49%

There is no difference in this respect by the broad type of market that firms obtained UKTI assistance with.

Figure 11.2.1.9 Measure A81 Increased Skills – By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Proportion increasing skills, net of non-additionality	58%	57%

As seen below, firms with a business plan with overseas targets are more likely to benefit from increased skills than those with no business plan, or those with a business plan that has no overseas targets. However, there is no difference between firms that have degree-level members of the management team and those who do not.

Figure 11.2.1.10 Measure A81 Increased Skills – By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Proportion increasing skills, net of non-additionality	59%	50%	54%	57%	55%

There are no significant differences by the market sector in which firms operate.

Figure 11.2.1.11 Measure A81 Increased Skills – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Proportion increasing skills, net of non-additionality	57%	54%	58%

11.2.2 Constituent Elements

The table below summarises the proportion of firms indicating a 'significant' benefit (i.e. '4' or '5' out of 5) for each of the constituent elements of Measure A81. Please note that this data is shown net of non-additionality.

Figure 11.2.2.1 Measure A81 Increased Skills – Constituent Elements

<i>Proportion benefiting to a significant extent</i>	Total exc. light support	Pass-port	GGG	EMRS	ERTA Sig. Assists	ER Events	ECR
<i>Base</i>	3714	360	362	40	360	305	41
Improved knowledge of competitive environment	40%	55%	47%	75%	35%	32%	37%
Gained new ideas about products, services, etc	25%	34%	29%	30%	21%	23%	34%
Improved overseas marketing strategy	37%	66%	57%	60%	38%	39%	83%
Improved marketing research skills (<i>EMRS only</i>)	50%	-	-	50%	-	-	-

<i>Proportion benefiting to a significant extent</i>	HQ Events	OMIS	MVS	TAP SOLO	TAP Group	TAP Non Fund	Out'd Miss.	In'd Miss.
<i>Base</i>	71	380	96	38	150	102	32	10
Improved knowledge of competitive environment	41%	38%	65%	71%	57%	49%	72%	50%
Gained new ideas about products, services, etc	14%	16%	46%	45%	45%	36%	25%	60%
Improved overseas marketing strategy	32%	37%	53%	55%	51%	46%	53%	30%

<i>Proportion benefiting to a significant extent</i>	Sector Events UK	Posts Sig. Assists	Posts Events	Web Bus Opps	Sector Events Abroad	DSO Events	DSO Sig. Assists	Web-inars
<i>Base</i>	297	617	201	289	104	59	60	80
Improved knowledge of competitive environment	33%	31%	40%	29%	55%	31%	42%	23%
Gained new ideas about products, services, etc	28%	14%	26%	0%	36%	20%	18%	0%
Improved overseas marketing strategy	28%	27%	36%	21%	45%	22%	42%	11%

At the total level, the most widely experienced increased skills are an improved knowledge of the competitive environment in an overseas market and improvements to firms' overseas marketing strategy, with around 40% of all firms experiencing significant benefits in these areas.

As detailed below, firms receiving assistance through tradeshows and missions are most likely to improve their knowledge of the competitive environment overseas, gain new ideas and also improve their overseas marketing strategy.

Figure 11.2.2.2 Measure A81 Increased Skills – Constituent Elements – By Service Type

<i>Proportion benefiting to a significant extent</i>	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Improved knowledge of competitive environment overseas	40%	33%	38%	58%	31%
Gained new ideas about products, services, techniques or technologies	25%	15%	27%	42%	17%
Improved overseas marketing strategy	46%	30%	35%	50%	27%

Well established exporters are less likely to benefit from new ideas or through improving their marketing strategy.

Figure 11.2.2.3 Measure A81 Increased Skills – Constituent Elements – By Number of Years Exporting

<i>Proportion benefiting to a significant extent</i>	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Improved knowledge of competitive environment overseas	44%	38%	39%
Gained new ideas about products, services, techniques or technologies	31%	25%	21%
Improved overseas marketing strategy	43%	39%	32%

The table below summarises the two strongest 'increased skills' impacts for each UKTI service, along with the proportion of firms scoring 4-5 for each one.

Figure 11.2.2.4 Measure A81 Increased Skills – Strongest Impacts

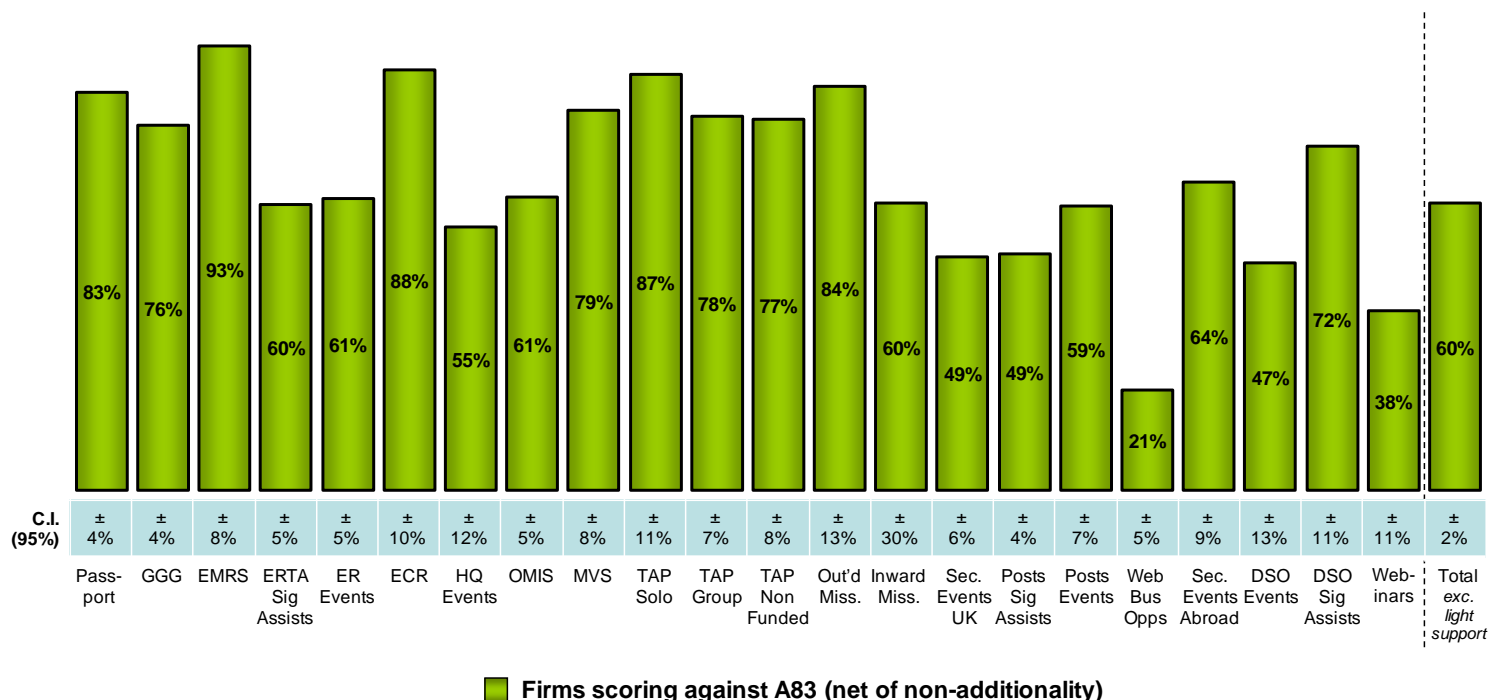
Sample Group	Strongest Impact	2 nd Strongest Impact
Passport	Improved overseas marketing strategy (66%)	Improved knowledge of competitive environment in overseas market (55%)
GGG	Improved overseas marketing strategy (57%)	Improved knowledge of competitive environment in overseas market (47%)
EMRS	Improved knowledge of competitive environment in overseas market (75%)	Improved overseas marketing strategy (60%)
ERTA Significant Assists	Improved overseas marketing strategy (38%)	Improved knowledge of competitive environment in overseas market (35%)
ER Events	Improved overseas marketing strategy (39%)	Improved knowledge of competitive environment in overseas market (32%)
ECR	Improved overseas marketing strategy (83%)	Improved knowledge of competitive environment in overseas market (37%)
HQ Events	Improved knowledge of competitive environment in overseas market (41%)	Improved overseas marketing strategy (32%)
OMIS	Improved knowledge of competitive environment in overseas market (38%)	Improved overseas marketing strategy (37%)
MVS	Improved knowledge of competitive environment in overseas market (65%)	Improved overseas marketing strategy (53%)
TAP Solo	Improved knowledge of competitive environment in overseas market (71%)	Improved overseas marketing strategy (55%)
TAP Group	Improved knowledge of competitive environment in overseas market (57%)	Improved overseas marketing strategy (51%)
TAP Non Funded	Improved knowledge of competitive environment in overseas market (49%)	Improved overseas marketing strategy (46%)
Outward Missions	Improved knowledge of competitive environment in overseas market (72%)	Improved overseas marketing strategy (53%)
Inward Missions	Gained new ideas (60%)	Improved knowledge of competitive environment in overseas market (50%)
Sector Events UK	Improved knowledge of competitive environment in overseas market (33%)	Gained new ideas (28%)
Posts Significant Assists	Improved knowledge of competitive environment in overseas market (31%)	Improved overseas marketing strategy (27%)
Posts Events	Improved knowledge of competitive environment in overseas market (40%)	Improved overseas marketing strategy (36%)
Website Business Opps	Improved knowledge of competitive environment in overseas market (29%)	Improved overseas marketing strategy (21%)
Sector Events Abroad	Improved knowledge of competitive environment in overseas market (55%)	Improved overseas marketing strategy (45%)
DSO Events	Improved knowledge of competitive environment in overseas market (31%)	Improved overseas marketing strategy (22%)
DSO Significant Assists	Improved knowledge of competitive environment in overseas market (42%)	Improved overseas marketing strategy (42%)
Webinars	Improved knowledge of competitive environment in overseas market (23%)	Improved overseas marketing strategy (11%)

11.3 Changed Behaviour – Measure A83

11.3.1 Summary

The chart below shows the proportion of supported businesses that anticipate benefiting from the UKTI support through changing their behaviour, along with the associated confidence intervals. This analysis forms one of the key survey measures, namely ‘Measure A83 – Changed Behaviour’.

Figure 11.3.1.1 Measure A83 Changed Behaviour



Base: All respondents (Base) - Passport (360), GGG (362), EMRS (40), ERTA (360), ER Events (305), ECR (41), HQ Events (71), OMIS (380), MVS (96), TAP Solo (38), TAP Group (150), TAP Non Funded (102), Outward Missions (32), Inward Missions (10), Sector Events UK (297), Posts Sig Assists (617), Posts Events (201), Website Bus Opps (289), Sector Events Abroad (104), DSO Events (59), DSO Sig Assists (60), Webinars (80), Total excl. light support (3714)

Almost two thirds of supported firms (60%) have benefited to a significant extent from at least one change in behaviour. This proportion rises to more than 80% in the case of Passport, EMRS, ECR, TAP Solo and Outward Mission participants.

The panel below provides further details of how Measure A83 has been calculated for this survey (please note that the references in brackets refer to the question number, with the questionnaire appended to this report).

A83 – Changed Behaviour

Firms are classified as having changed their behaviour if they feel that they have or will ‘to a significant extent’ (i.e. scored ‘4’ or ‘5’ for)...

- Introduce new products or services or make improvements to existing ones (D2l)
- Or, make improvements to their new product or service development strategy (D2t)
- Or, improve the way they do business in an overseas market (D2n)
- Or, improve their overseas marketing strategy (D2o)
- Or, gain the confidence to either explore a new market or expand in an existing one (D2h)

In each case net of non-additionality, so firms indicating that they ‘would achieve similar results anyway’ (D10) do not score against the measure.

Measure A83 has also been calculated separately for each broad type of UKTI support. As seen below, firms attending tradeshows and missions are most likely to have significantly changed their behaviour as a result of the UKTI support, followed by users of UK-based advisory services.

Figure 11.3.1.2 Measure A83 Changed Behaviour – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Proportion changing behaviour, net of non-additionality	67%	52%	57%	79%	51%

The longer a firm has been operating overseas, the less likely it is to indicate that the UKTI support has prompted it to change its behaviour.

Figure 11.3.1.3 Measure A83 Changed Behaviour – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Proportion changing behaviour, net of non-additionality	65%	61%	56%

As seen below, firms that are classified as being innovative are more likely to change their behaviour following the UKTI support.

Figure 11.3.1.4 Measure A83 Changed Behaviour – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Proportion changing behaviour, net of non-additionality	61%	52%	62%	56%

Firms that plan to grow substantially over the next 5 years are also significantly more likely to change their behaviour as a result of the UKTI assistance.

Figure 11.3.1.5 Measure A83 Changed Behaviour – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Proportion changing behaviour, net of non-additionality	54%	59%	64%

There are no statistically significant differences between firms who were born global and those who started exporting after they were established. There is also no difference between firms established in the last 5 years and older firms.

Figure 11.3.1.6 Measure A83 Changed Behaviour – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Proportion changing behaviour, net of non-additionality	61%	60%	64%	62%	59%

There is clear evidence that the smaller a firm is, the more likely the UKTI support is to result in changed behaviour.

Figure 11.3.1.7 Measure A83 Changed Behaviour – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Proportion changing behaviour, net of non-additionality	64%	60%	56%	50%

There is a similar picture when it comes to turnover, and firms with annual sales of less than £25million are considerably more likely to score against this measure.

Figure 11.3.1.8 Measure A83 Changed Behaviour – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Proportion changing behaviour, net of non-additionality	64%	63%	62%	52%	49%

There is no difference in the Changed Behaviour measure between those accessing support about high growth and established markets.

Figure 11.3.1.9 Measure A83 Changed Behaviour – By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Proportion changing behaviour, net of non-additionality	64%	63%

Firms with a business plan with overseas targets are far more likely to report changed behaviour than those with no business plan or a business plan with no overseas targets. There is little difference in this respect by whether or not firms have degree-level owners, partners or directors.

Figure 11.3.1.10 Measure A83 Changed Behaviour – By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Proportion changing behaviour, net of non-additionality	65%	53%	57%	62%	60%

Firms in the production sector are more likely than those in the services sector to have changed their behaviour as a result of the support.

Figure 11.3.1.11 Measure A83 Changed Behaviour – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Proportion changing behaviour, net of non-additionality	64%	58%	57%

11.3.2 Constituent Elements

The table below summarises the proportion of firms indicating a ‘significant’ benefit (i.e. ‘4’ or ‘5’ out of 5) for each of the constituent elements of Measure A83. Please note that this data is shown net of non-additionality.

Figure 11.3.2.1 Measure A83 Changed Behaviour – Constituent Elements

<i>Proportion benefiting to a significant extent</i>	Total exc. light support	Passport	GGG	EMRS	ERTA Sig. Assists	ER Events	ECR
<i>Base</i>	3714	360	362	40	360	305	41
Introduced or improved products/services	28%	43%	35%	40%	24%	20%	44%
Improved NPD strategy	28%	45%	38%	40%	26%	29%	46%
Improved way do business overseas	37%	64%	56%	68%	40%	42%	63%
Improved overseas marketing strategy	37%	66%	57%	60%	38%	39%	83%
Gained confidence to explore/ expand overseas	43%	68%	59%	78%	45%	40%	63%

<i>Proportion benefiting to a significant extent</i>	HQ Events	OMIS	MVS	TAP SOLO	TAP Group	TAP Non Fund	Out'd Miss.	In'd Miss.
<i>Base</i>	71	380	96	38	150	102	32	10
Introduced or improved products/services	24%	21%	52%	50%	51%	49%	59%	50%
Improved NPD strategy	28%	24%	45%	45%	50%	42%	53%	40%
Improved way do business overseas	30%	36%	50%	47%	50%	43%	38%	50%
Improved overseas marketing strategy	32%	37%	53%	55%	51%	46%	53%	30%
Gained confidence to explore/ expand overseas	35%	44%	63%	68%	62%	49%	53%	50%

<i>Proportion benefiting to a significant extent</i>	Sector Events UK	Posts Sig. Assists	Posts Events	Web Bus Opps	Sector Events Abroad	DSO Events	DSO Sig. Assists	Webinars
<i>Base</i>	297	617	201	289	104	59	60	80
Introduced or improved products/services	20%	20%	25%	0%	31%	19%	32%	0%
Improved NPD strategy	23%	17%	25%	0%	31%	15%	32%	0%
Improved way do business overseas	25%	30%	36%	0%	32%	29%	45%	14%
Improved overseas marketing strategy	28%	27%	36%	21%	45%	22%	42%	11%
Gained confidence to explore/ expand overseas	33%	36%	36%	0%	43%	36%	53%	24%

The most widely experienced individual impacts are an increased confidence to explore new markets or expand in existing ones, improvements to the way firms do business overseas and an improved overseas marketing strategy.

Firms attending tradeshows/missions and using UK-based advisory services are generally most likely to benefit from each of the individual elements of Measure A83.

Figure 11.3.2.2 Measure A83 Changed Behaviour – Constituent Elements
– By Service Type

<i>Proportion benefiting to a significant extent</i>	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Introduced or improved products/services	29%	21%	23%	51%	20%
Improved NPD strategy	31%	19%	27%	46%	16%
Improved way do business overseas	47%	33%	33%	47%	30%
Improved overseas marketing strategy	46%	30%	35%	50%	27%
Gained confidence to explore/expand overseas	51%	38%	37%	58%	38%

Firms with more than 10 years overseas experience are least likely to experience each of these benefits.

Figure 11.3.2.3 Measure A83 Changed Behaviour – Constituent Elements
– By Number of Years Exporting

<i>Proportion benefiting to a significant extent</i>	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Introduced or improved products/services	32%	28%	24%
Improved NPD strategy	33%	30%	23%
Improved way do business overseas	44%	38%	32%
Improved overseas marketing strategy	43%	39%	32%
Gained confidence to explore/expand overseas	50%	45%	37%

The table below summarises the two strongest 'changed behaviour' impacts for each UKTI service, along with the proportion of firms scoring of 4-5 for each one.

Figure 11.3.2.4 Measure A83 Changed Behaviour – Strongest Impacts

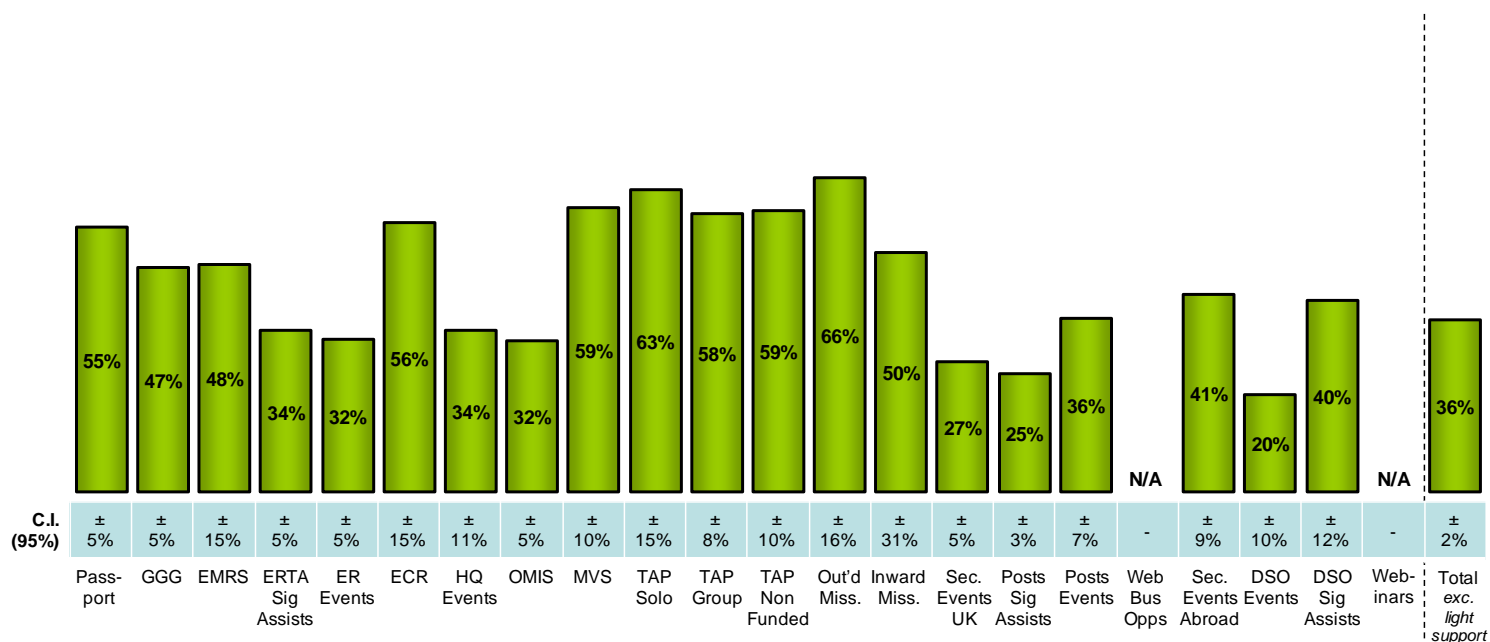
Sample Group	Strongest Impact	2 nd Strongest Impact
Passport	Confidence to explore new/expand in existing markets (68%)	Improved your overseas marketing strategy (66%)
GGG	Confidence to explore new/expand in existing markets (59%)	Improved your overseas marketing strategy (57%)
EMRS	Confidence to explore new/expand in existing markets (78%)	Improved the way you do business in overseas markets (68%)
ERTA Significant Assists	Confidence to explore new/expand in existing markets (45%)	Improved the way you do business in overseas markets (40%)
ER Events	Improved the way you do business in overseas markets (42%)	Confidence to explore new/expand in existing markets (40%)
ECR	Improved your overseas marketing strategy (83%)	Confidence to explore new/expand in existing markets (63%)
HQ Events	Confidence to explore new/expand in existing markets (35%)	Improved your overseas marketing strategy (32%)
OMIS	Confidence to explore new/expand in existing markets (44%)	Improved your overseas marketing strategy (37%)
MVS	Confidence to explore new/expand in existing markets (63%)	Improved your overseas marketing strategy (53%)
TAP Solo	Confidence to explore new/expand in existing markets (68%)	Improved your overseas marketing strategy (55%)
TAP Group	Confidence to explore new/expand in existing markets (62%)	Improved your overseas marketing strategy (51%)
TAP Non Funded	Confidence to explore new/expand in existing markets (49%)	Introduced new/improved products or services (49%)
Outward Missions	Introduced new/improved products or services (59%)	Confidence to explore new/expand in existing markets (53%)
Inward Missions	Introduced new/improved products or services (50%)	Confidence to explore new/expand in existing markets (50%)
Sector Events in the UK	Confidence to explore new/expand in existing markets (33%)	Improved your overseas marketing strategy (28%)
Posts Significant Assists	Confidence to explore new/expand in existing markets (36%)	Improved the way you do business in overseas markets (30%)
Posts Events	Confidence to explore new/expand in existing markets (36%)	Improved your overseas marketing strategy (36%)
Website Business Opps	Improved your overseas marketing strategy (21%)	-
Sector Events Abroad	Improved your overseas marketing strategy (45%)	Confidence to explore new/expand in existing markets (43%)
DSO Events	Confidence to explore new/expand in existing markets (36%)	Improved the way you do business in overseas markets (29%)
DSO Significant Assists	Confidence to explore new/expand in existing markets (53%)	Improved the way you do business in overseas markets (45%)
Webinars	Confidence to explore new/expand in existing markets (24%)	Improved the way you do business in overseas markets (14%)

11.4 Increased Innovation – Measure A04

11.4.1 Summary

The chart below shows the proportion of supported businesses that anticipate benefiting from the UKTI support through increasing their innovation activity, along with the associated confidence intervals. This analysis forms one of the key survey measures, namely 'Measure A04 – Increased Innovation'. Please note that users of the Website Business Opportunities service and Webinar attendees are excluded from this measure.

Figure 11.4.1.1 Measure A04 Increased Innovation



■ Firms scoring against A04 (net of non-additionality)

Base: All respondents exc. Web Business Opportunities & Webinars (Base) - Passport (360), GGG (362), EMRS (40), ERTA (360), ER Events (305), ECR (41), HQ Events (71), OMIS (380), MVS (96), TAP Solo (38), TAP Group (150), TAP Non Funded (102), Outward Missions (32), Inward Missions (10), Sector Events UK (297), Posts Sig Assists (617), Posts Events (201), Sector Events Abroad (104), DSO Events (59), DSO Sig Assists (60), Total excl. light support (3714)

Over a third of supported firms (36%) have benefited or anticipate benefiting from increased innovation levels as a result of the assistance received. Passport, ECR, MVS, TAP and Outward Missions are most likely to result in increased innovation, with more than half of participants scoring against this measure.

The panel below provides further details of how Measure A04 has been calculated for this survey (please note that the references in brackets refer to the question number, with the questionnaire appended to this report).

A04 – Increased Innovation

Firms are classified as having increased innovation if they feel that they have or will ‘to a significant extent’ (i.e. scored ‘4’ or ‘5’ for)...

- Introduce new products or services or make improvements to existing ones (D2l)
- Or, make improvements to their new product or service development strategy (D2t)

In each case net of non-additionality, so firms indicating that they ‘would achieve similar results anyway’ (D10) do not score against the measure.

Measure A04 has also been calculated separately for each broad type of UKTI support. As seen below, firms attending tradeshows and missions are significantly more likely to have experienced innovation benefits than users of other services.

Figure 11.4.1.2 Measure A04 Increased Innovation – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Proportion increasing innovation, net of non-additionality	39%	26%	33%	59%	23%

As seen with the other impact measures, support directed at more established exporters is least likely to result in increased innovation levels.

Figure 11.4.1.3 Measure A04 Increased Innovation – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Proportion increasing innovation, net of non-additionality	41%	37%	32%

Innovative firms are significantly more likely to benefit from increased innovation than their non-innovative counterparts.

Figure 11.4.1.4 Measure A04 Increased Innovation – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Proportion increasing innovation, net of non-additionality	37%	30%	38%	31%

Those firms that are planning to grow over the next 5 years are significantly more likely to increase their innovation levels as a result of the support. This is consistent with the 2014 UKTI Internationalisation Survey⁴⁵, which found strong links between growth and innovation (firms with more ambitious growth objectives were much more likely to be planning to develop new products/services and to make changes to their existing ones).

Figure 11.4.1.5 Measure A04 Increased Innovation – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Proportion increasing innovation, net of non-additionality	31%	34%	39%

There is no statistically significant difference between born global firms and other young firms that started exporting at some point after they were established. As a whole, younger firms are significantly more likely to benefit in this way than their more well-established counterparts.

Figure 11.4.1.6 Measure A04 Increased Innovation – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Proportion increasing innovation, net of non-additionality	38%	39%	44%	42%	34%

It is also the case that smaller firms, and particularly micro SMEs, are more likely to benefit from increased innovation.

Figure 11.4.1.7 Measure A04 Increased Innovation – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Proportion increasing innovation, net of non-additionality	40%	34%	28%	29%

⁴⁵ Internationalisation Strategies, Barriers & Awareness Survey 2014, OMB Research (August 2014)

Reflecting the results by employee numbers, firms with an annual turnover of less than £500,000 are most likely to report significant benefits to their innovation activity.

Figure 11.4.1.8 Measure A04 Increased Innovation – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Proportion increasing innovation, net of non-additionality	42%	34%	35%	27%	30%

There is no difference between firms receiving support in relation to established markets and those targeting high growth markets.

Figure 11.4.1.9 Measure A04 Increased Innovation – By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Proportion increasing innovation, net of non-additionality	37%	39%

As detailed below, firms with a business plan that contains overseas targets are significantly more likely to benefit from increased innovation as a result of UKTI support compared to those with no business plan. There is little difference in this respect by whether or not firms have any degree-level owners, partners or directors.

Figure 11.4.1.10 Measure A04 Increased Innovation – By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Proportion increasing innovation, net of non-additionality	40%	29%	34%	37%	39%

As seen below, there is also no difference between production and service sector firms in this respect.

Figure 11.4.1.11 Measure A04 Increased Innovation – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Proportion increasing innovation, net of non-additionality	36%	36%	28%

11.4.2 Constituent Elements

The constituent elements of Measure A04 are a sub-set of those that make up Measure A83 Changed Behaviour. The table below summarises the two strongest 'increased innovation' impacts for each UKTI service.

Figure 11.4.2.1 Measure A04 Increased Innovation – Strongest Impacts

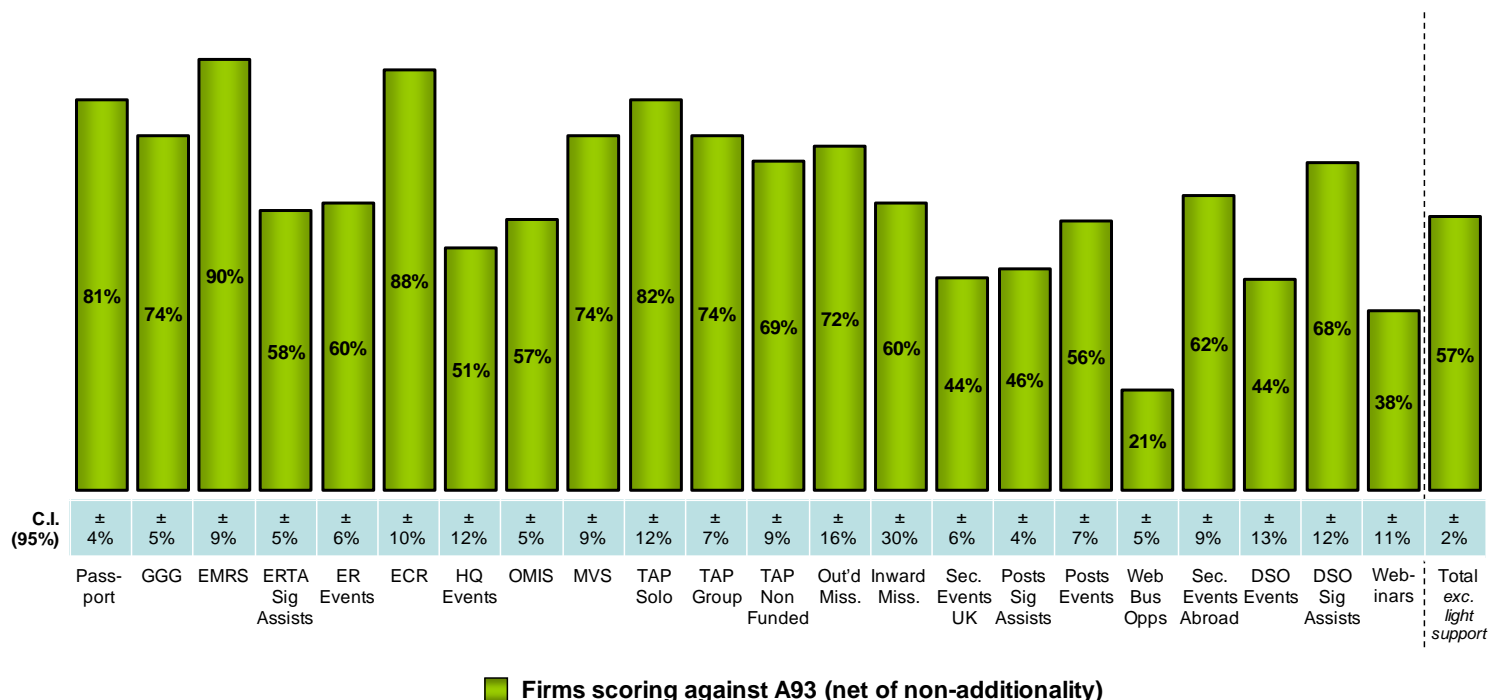
Sample Group	Strongest Impact	2 nd Strongest Impact
Passport	Made improvements to NPD strategy (45%)	Introduced new/improved products or services (43%)
GGG	Made improvements to NPD strategy (38%)	Introduced new/improved products or services (35%)
EMRS	Introduced new/improved products or services (40%)	Made improvements to NPD strategy (40%)
ERTA Significant Assists	Made improvements to NPD strategy (26%)	Introduced new/improved products or services (24%)
ER Events	Made improvements to NPD strategy (29%)	Introduced new/improved products or services (20%)
ECR	Made improvements to NPD strategy (46%)	Introduced new/improved products or services (44%)
HQ Events	Made improvements to NPD strategy (28%)	Introduced new/improved products or services (24%)
OMIS	Made improvements to NPD strategy (24%)	Introduced new/improved products or services (21%)
MVS	Introduced new/improved products or services (52%)	Made improvements to NPD strategy (45%)
TAP Solo	Introduced new/improved products or services (50%)	Made improvements to NPD strategy (45%)
TAP Group	Introduced new/improved products or services (51%)	Made improvements to NPD strategy (50%)
TAP Non Funded	Introduced new/improved products or services (49%)	Made improvements to NPD strategy (42%)
Outward Missions	Introduced new/improved products or services (59%)	Made improvements to NPD strategy (53%)
Inward Missions	Introduced new/improved products or services (50%)	Made improvements to NPD strategy (40%)
Sector Events UK	Made improvements to NPD strategy (23%)	Introduced new/improved products or services (20%)
Posts Significant Assists	Introduced new/improved products or services (20%)	Made improvements to NPD strategy (17%)
Posts Events	Introduced new/improved products or services (25%)	Made improvements to NPD strategy (25%)
Sector Events Abroad	Made improvements to NPD strategy (31%)	Introduced new/improved products or services (31%)
DSO Events	Introduced new/improved products or services (19%)	Made improvements to NPD strategy (15%)
DSO Significant Assists	Introduced new/improved products or services (32%)	Made improvements to NPD strategy (32%)

11.5 Improved Overseas Approach – Measure A93

11.5.1 Summary

The chart below shows the proportion of supported businesses that anticipate benefiting from the UKTI support through improving their approach to doing business overseas, along with the associated confidence intervals. This analysis forms one of the key survey measures, namely ‘Measure A93 – Improved Overseas Approach’.

Figure 11.5.1.1 Measure A93 Improved Overseas Approach



Base: All respondents (Base) - Passport (360), GGG (362), EMRS (40), ERTA (360), ER Events (305), ECR (41), HQ Events (71), OMIS (380), MVS (96), TAP Solo (38), TAP Group (150), TAP Non Funded (102), Outward Missions (32), Inward Missions (10), Sector Events UK (297), Posts Sig Assists (617), Posts Events (201), Website Bus Opps (289), Sector Events Abroad (104), DSO Events (59), DSO Sig Assists (60), Webinars (80), Total excl. light support (3714)

Well over half of UKTI users score against the improved overseas approach measure, with EMRS, ECR, Passport and TAP Solo users particularly likely to benefit in this way.

The panel below provides further details of how Measure A93 has been calculated for this survey (please note that the references in brackets refer to the question number, with the questionnaire appended to this report).

A93 – Improved Overseas Approach

Firms are classified as having improved their approach to doing business overseas if they feel that they have or will ‘to a significant extent’ (i.e. scored ‘4’ or ‘5’ for)...

- Improve the way they do business in an overseas market (D2n)
- Or, improve their overseas marketing strategy (D2o)
- Or, gain the confidence to either explore a new market or expand in an existing one (D2h)

In each case net of non-additionality, so firms indicating that they ‘would achieve similar results anyway’ (D10) do not score against the measure.

Measure A93 has also been calculated separately for each broad type of UKTI support. Firms who attend UKTI tradeshows or missions are most likely to improve their overseas approach, closely followed by firms using UK-based advisory services.

Figure 11.5.1.2 Measure A93 Improved Overseas Approach – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Proportion improving overseas approach, net of non-additionality	65%	49%	53%	72%	48%

Experienced exporters that have been trading overseas for more than 10 years are least likely to improve their overseas approach as a result of UKTI support.

Figure 11.5.1.3 Measure A93 Improved Overseas Approach – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Proportion improving overseas approach, net of non-additionality	62%	58%	52%

Innovative firms are more likely to improve on their overseas approach than their non-innovative counterparts.

Figure 11.5.1.4 Measure A93 Improved Overseas Approach – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Proportion improving overseas approach, net of non-additionality	58%	50%	58%	54%

As shown below, firms that have aspirations to grow their business in the next 5 years are more likely to score against the A93 Improved Overseas Approach measure.

Figure 11.5.1.5 Measure A93 Improved Overseas Approach – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Proportion improving overseas approach, net of non-additionality	48%	55%	60%

There is little difference between firms that were born global and those that were not, and similarly there is no significant difference by age of firm.

Figure 11.5.1.6 Measure A93 Improved Overseas Approach – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Proportion improving overseas approach, net of non-additionality	57%	57%	60%	59%	56%

However, there is a clear relationship between company size and the likelihood of scoring against this measure.

Figure 11.5.1.7 Measure A93 Improved Overseas Approach – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Proportion improving overseas approach, net of non-additionality	60%	56%	53%	46%

Likewise, the smaller a firm is in terms of turnover, the more likely it is to improve its approach to doing business overseas as a result of the UKTI support.

Figure 11.5.1.8 Measure A93 Improved Overseas Approach
– By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Proportion improving overseas approach, net of non-additionality	61%	60%	58%	47%	42%

There is no difference in this measure between firms that received support about high growth or established markets.

Figure 11.5.1.9 Measure A93 Improved Overseas Approach
– By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Proportion improving overseas approach, net of non-additionality	60%	59%

Firms with a business plan containing overseas targets are most likely to improve their overseas approach as a result of UKTI support. However, there is little difference in this respect by whether firms with degree-level senior management.

Figure 11.5.1.10 Measure A93 Improved Overseas Approach
– By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Proportion improving overseas approach, net of non-additionality	61%	50%	54%	59%	57%

As detailed below, firms in the production sector are more likely than those in the services sector to report improvements to their overseas approach.

Figure 11.5.1.11 Measure A93 Improved Overseas Approach – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Proportion improving overseas approach, net of non-additionality	60%	54%	55%

11.5.2 Constituent Elements

The constituent elements of Measure A93 are a sub-set of those that make up Measure A83 Changed Behaviour. The table below summarises the two strongest 'increased innovation' impacts for each UKTI service.

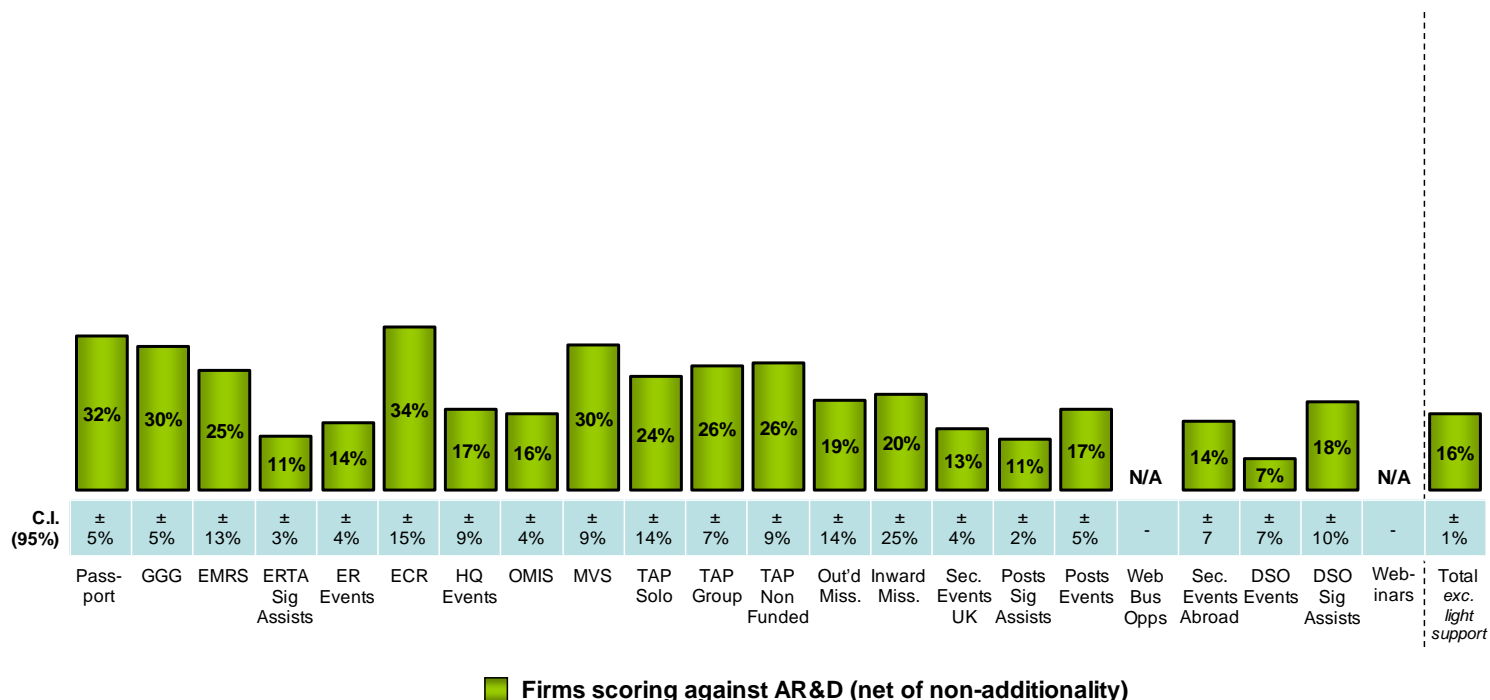
Figure 11.5.2.1 Measure A93 Improved Overseas Approach – Strongest Impacts

Sample Group	Strongest Impact	2 nd Strongest Impact
Passport	Confidence to explore new/expand in existing markets (68%)	Improved your overseas marketing strategy (66%)
GGG	Confidence to explore new/expand in existing markets (59%)	Improved your overseas marketing strategy (57%)
EMRS	Confidence to explore new/expand in existing markets (78%)	Improved the way you do business in overseas markets (68%)
ERTA Significant Assists	Confidence to explore new/expand in existing markets (45%)	Improved the way you do business in overseas markets (40%)
ER Events	Improved the way you do business in overseas markets (42%)	Confidence to explore new/expand in existing markets (40%)
ECR	Improved your overseas marketing strategy (83%)	Confidence to explore new/expand in existing markets (63%)
HQ Events	Confidence to explore new/expand in existing markets (35%)	Improved your overseas marketing strategy (32%)
OMIS	Confidence to explore new/expand in existing markets (44%)	Improved your overseas marketing strategy (37%)
MVS	Confidence to explore new/expand in existing markets (63%)	Improved your overseas marketing strategy (53%)
TAP Solo	Confidence to explore new/expand in existing markets (68%)	Improved your overseas marketing strategy (55%)
TAP Group	Confidence to explore new/expand in existing markets (62%)	Improved your overseas marketing strategy (51%)
TAP Non Funded	Confidence to explore new/expand in existing markets (49%)	Improved your overseas marketing strategy (46%)
Outward Missions	Confidence to explore new/expand in existing markets (53%)	Improved your overseas marketing strategy (53%)
Inward Missions	Confidence to explore new/expand in existing markets (50%)	Improved the way you do business in overseas markets (50%)
Sector Events UK	Confidence to explore new/expand in existing markets (33%)	Improved your overseas marketing strategy (28%)
Posts Significant Assists	Confidence to explore new/expand in existing markets (36%)	Improved the way you do business in overseas markets (30%)
Posts Events	Confidence to explore new/expand in existing markets (36%)	Improved your overseas marketing strategy (36%)
Website Business Opps	Improved your overseas marketing strategy (21%)	-
Sector Events Abroad	Improved your overseas marketing strategy (45%)	Confidence to explore new/expand in existing markets (43%)
DSO Events	Confidence to explore new/expand in existing markets (36%)	Improved the way you do business in overseas markets (29%)
DSO Significant Assists	Confidence to explore new/expand in existing markets (53%)	Improved the way you do business in overseas markets (45%)
Webinars	Confidence to explore new/expand in existing markets (24%)	Improved the way you do business in overseas markets (14%)

11.6 Increased R&D – Measure AR&D

The chart below shows the proportion of supported businesses that anticipate benefiting from the UKTI support through increasing their R&D activity, along with the associated confidence intervals. This analysis forms one of the key survey measures, namely 'Measure AR&D – Increased R&D'. Please note that users of the Website Business Opportunities service and Webinar attendees are excluded from this measure.

Figure 11.6.1.1 Measure AR&D Increased R&D



Base: All respondents exc. Web Business Opportunities & Webinars (Base) - Passport (360), GGG (362), EMRS (40), ERTA (360), ER Events (305), ECR (41), HQ Events (71), OMIS (380), MVS (96), TAP Solo (38), TAP Group (150), TAP Non Funded (102), Outward Missions (32), Inward Missions (10), Sector Events UK (297), Posts Sig Assists (617), Posts Events (201), Sector Events Abroad (104), DSO Events (59), DSO Sig Assists (60), Total excl. light support (3714)

Overall, 16% of firms are judged to have increased their R&D activity as a result of the UKTI support they have received (or anticipate doing so in future). This proportion increases to around a third of clients in the case of Passport, Gateway to Global Growth, ECR and MVS.

The panel below provides further details of how Measure AR&D has been calculated for this survey (please note that the references in brackets refer to the question number, with the questionnaire appended to this report).

AR&D – Increased R&D

Firms are classified as having increased their R&D if they feel that the support has influenced them (or will influence them) to...

- Increase the amount they spend on R&D or new product/service development (F22b)
- And, increase the number of people engaged in or total amount of time spent on R&D or new product/service development (F22a)

In each case net of non-additionality, so firms indicating that they ‘would achieve similar results anyway’ (D10) do not score against the measure.

Measure AR&D has also been calculated separately for each of the broad types of UKTI support. As seen below, firms attending tradeshows and missions are most likely to increase their R&D activity.

Figure 11.6.1.2 Measure AR&D Increased R&D – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Proportion increasing R&D activity, net of non-additionality	18%	12%	15%	27%	10%

As with most of the impact measure, firms that have been doing business overseas for more than 10 years are least likely to increase their R&D activity as a result of the UKTI support.

Figure 11.6.1.3 Measure AR&D Increased R&D – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Proportion increasing R&D activity, net of non-additionality	20%	18%	13%

As might be expected, innovative firms are much more likely to increase their R&D activity as a result of the UKTI support than their non-innovative counterparts.

Figure 11.6.1.4 Measure AR&D Increased R&D – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Proportion increasing R&D activity, net of non-additionality	18%	4%	21%	8%

Firms with ‘substantial’ growth aspirations are also considerably more likely to benefit in this way.

Figure 11.6.1.5 Measure AR&D Increased R&D – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Proportion increasing R&D activity, net of non-additionality	8%	13%	23%

Firms that were ‘born global’ appear less likely to increase their R&D levels as a result of the support than other young firms. As a whole, young firms are more likely to score against this measure than those that have been trading for more than 5 years.

Figure 11.6.1.6 Measure AR&D Increased R&D – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Proportion increasing R&D activity, net of non-additionality	17%	18%	23%	21%	15%

Support directed at smaller firms with less than 10 staff is significantly more likely to result in increased R&D than that provided to larger companies.

Figure 11.6.1.7 Measure AR&D Increased R&D – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Proportion increasing R&D activity, net of non-additionality	20%	16%	15%	9%

There is also a similar relationship between annual turnover and the Increased R&D measure.

Figure 11.6.1.8 Measure AR&D Increased R&D – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Proportion increasing R&D activity, net of non-additionality	21%	20%	16%	10%	9%

Firms receiving support about established markets are slightly more likely to increase their R&D activity following the UKTI support than those looking at high growth markets.

Figure 11.6.1.9 Measure AR&D Increased R&D – By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Proportion increasing R&D activity, net of non-additionality	16%	19%

Firms with a formal business plan that contains targets for overseas revenues are most likely to increase their R&D activity as a result of the UKTI support. Companies with degree-level senior management are also more likely to report increased R&D.

Figure 11.6.1.10 Measure AR&D Increased R&D – By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Proportion increasing R&D activity, net of non-additionality	19%	14%	14%	19%	15%

There are no major differences by market sector when it comes to the proportion of firms increasing their R&D activity.

Figure 11.6.1.11 Measure AR&D Increased R&D – By Sector

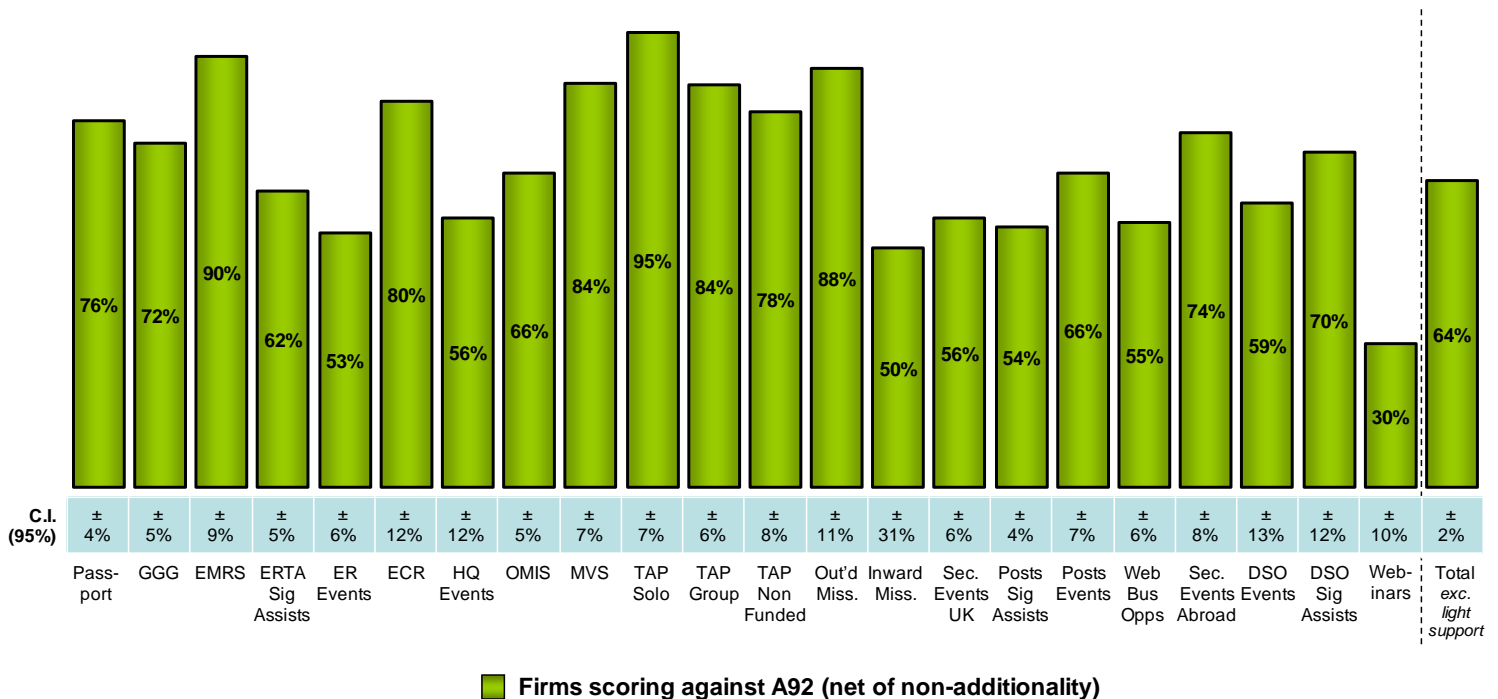
	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Proportion increasing R&D activity, net of non-additionality	17%	16%	21%

11.7 Barriers to Market Access Overcome – Measure A92

11.7.1 Summary

The chart below shows the proportion of supported businesses that anticipate benefiting from the UKTI support through overcoming barriers to market access, along with the associated confidence intervals. This analysis forms one of the key survey measures, namely ‘Measure A92 – Barriers Overcome’.

Figure 11.7.1.1 Measure A92 Barriers Overcome



Base: All respondents (Base) - Passport (360), GGG (362), EMRS (40), ERTA (360), ER Events (305), ECR (41), HQ Events (71), OMIS (380), MVS (96), TAP Solo (38), TAP Group (150), TAP Non Funded (102), Outward Missions (32), Inward Missions (10), Sector Events UK (297), Posts Sig Assists (617), Posts Events (201), Website Bus Opps (289), Sector Events Abroad (104), DSO Events (59), DSO Sig Assists (60), Webinars (80), Total excl. light support (3714)

In almost two thirds (64%) of all cases the UKTI support has enabled firms to overcome at least one barrier to market access.

However, this does differ considerably across the various services, with users of EMRS, TAP Solo and Outward Missions most likely to benefit in this way. Webinars are least likely to result in firms overcoming barriers.

The panel below provides further details of how Measure A92 has been calculated for this survey (please note that the references in brackets refer to the question number, with the questionnaire appended to this report).

A92 – Barriers Overcome

Firms are classified as indicating barriers to market access overcome if they feel that they have or will ‘to a significant extent’ (i.e. scored ‘4’ or ‘5’ for)...

- Gain access to prospective customers, business partners or other people that they would otherwise have been unable to meet (D2a)
- Or, gain access to information that they would otherwise have been unable to come by (D2e)
- Or, improve their company’s profile or credibility (D2c)
- Or, overcome a particular problem or difficulty with a legal issue, regulations or quality standards (D2f) – *OMIS, Posts Sig Assists & HVO Sig Assists only*

In each case net of non-additionality, so firms indicating that they ‘would achieve similar results anyway’ (D10) do not score against the measure.

Measure A92 has also been calculated separately for each of the broad types of UKTI support. As seen below, firms attending tradeshows and missions are most likely to overcome barriers.

Figure 11.7.1.2 Measure A92 Barriers Overcome – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Proportion overcoming barriers, net of non-additionality	66%	57%	61%	83%	60%

Firms with less overseas experience tend to be more likely to overcome barriers, with 68% of firms that have less than 2 years export experience overcoming barriers. However, it is still the case that almost two-thirds of firms that have been exporting for more than 10 years have benefited in this way, which suggests that barriers can occur at any stage of a firm’s overseas development and highlights the effectiveness of UKTI at enabling firms to overcome these issues.

Figure 11.7.1.3 Measure A92 Barriers Overcome – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Proportion overcoming barriers, net of non-additionality	68%	65%	61%

As seen below, innovative firms are more likely to overcome barriers than their non-innovative counterparts.

Figure 11.7.1.4 Measure A92 Barriers Overcome – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Proportion overcoming barriers, net of non-additionality	65%	60%	65%	62%

Firms that plan to grow over the next 5 years are much more likely to overcome barriers as a result of the UKTI support than those that simply intend to remain the same size (or become smaller).

Figure 11.7.1.5 Measure A92 Barriers Overcome – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Proportion overcoming barriers, net of non-additionality	55%	64%	67%

There is little difference between born global firms and other young businesses. However, as a whole, young firms are significantly more likely to score against this measure than those that have been trading for over 5 years.

Figure 11.7.1.6 Measure A92 Barriers Overcome – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Proportion overcoming barriers, net of non-additionality	68%	66%	68%	67%	63%

Micro SMEs are most likely to overcome barriers as a result of the UKTI support. However, well over half of all non-SMEs have still benefited in this way, demonstrating that access barriers are experienced by all exporters, irrespective of size, and suggesting that the UKTI support plays a valuable role in enabling all types of firm to overcome these barriers.

Figure 11.7.1.7 Measure A92 Barriers Overcome – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Proportion overcoming barriers, net of non-additionality	67%	63%	63%	59%

While smaller firms with annual sales of less than £25million are the most likely to overcome barriers as a result of the UKTI support, it is still the case that the majority of Medium Sized Business (MSBs) and large firms report this outcome.

Figure 11.7.1.8 Measure A92 Barriers Overcome – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Proportion overcoming barriers, net of non-additionality	67%	65%	66%	56%	57%

Although it might be expected that high growth markets involve more barriers, firms accessing support about established markets are equally as likely to score against the Barriers Overcome measure.

Figure 11.7.1.9 Measure A92 Barriers Overcome – By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Proportion overcoming barriers, net of non-additionality	66%	68%

Firms with a business plan that does not include overseas targets are least likely to score against this measure, perhaps because their primary focus is on the UK. There is no difference in the proportion overcoming barriers by whether the firm has degree-educated members of their senior management team or not.

Figure 11.7.1.10 Measure A92 Barriers Overcome – By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Proportion overcoming barriers, net of non-additionality	67%	57%	65%	66%	64%

As seen below, there is no difference in this respect by market sector.

Figure 11.7.1.11 Measure A92 Barriers Overcome – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Proportion overcoming barriers, net of non-additionality	65%	64%	62%

11.7.2 Constituent Elements

The table below summarises the proportion of firms indicating a 'significant' benefit (i.e. '4' or '5' out of 5) for each of the constituent elements of Measure A92. Please note that this data is shown net of non-additionality.

Figure 11.7.2.1 Measure A92 Barriers Overcome – Constituent Elements

<i>Proportion benefiting to a significant extent</i>	Total exc. light support	Passport	GGG	EMRS	ERTA Sig. Assists	ER Events	ECR
<i>Base</i>	3714	360	362	40	360	305	41
Access to customers, partners, etc	47%	58%	54%	80%	40%	27%	51%
Access to info otherwise unable to come by	46%	61%	54%	58%	52%	40%	51%
Improved profile/credibility	42%	54%	46%	73%	35%	26%	71%
Overcome a legal/regulatory issue (<i>OMIS, Posts Sig Assists & HVO Sig Assists only</i>)	14%	-	-	-	-	-	-

<i>Proportion benefiting to a significant extent</i>	HQ Events	OMIS	MVS	TAP SOLO	TAP Group	TAP Non Fund	Out'd Miss.	In'd Miss.
<i>Base</i>	71	380	96	38	150	102	32	10
Access to customers, partners, etc	39%	53%	78%	89%	81%	69%	66%	40%
Access to info otherwise unable to come by	44%	45%	65%	74%	54%	43%	53%	40%
Improved profile/credibility	35%	41%	65%	82%	72%	66%	69%	40%
Overcome a legal/regulatory issue (<i>OMIS, Posts Sig Assists & HVO Sig Assists only</i>)	-	12%	-	-	-	-	-	-

<i>Proportion benefiting to a significant extent</i>	Sector Events UK	Posts Sig. Assists	Posts Events	Web Bus Opps	Sector Events Abroad	DSO Events	DSO Sig. Assists	Webinars
<i>Base</i>	297	617	201	289	104	59	60	80
Access to customers, partners, etc	39%	36%	46%	40%	62%	39%	50%	0%
Access to info otherwise unable to come by	41%	38%	43%	43%	53%	37%	48%	26%
Improved profile/credibility	29%	33%	45%	29%	54%	36%	53%	11%
Overcome a legal/regulatory issue (<i>OMIS, Posts Sig Assists & HVO Sig Assists only</i>)	-	14%	-	-	-	-	-	4%

Almost half of supported firms have benefited through access to contacts and information that they would otherwise have been unable to come by, and two-fifths have improved their profile or credibility.

As seen below, firms supported through tradeshows/missions are the most likely to benefit from each of the individual elements of the Barriers Overcome measure (and particularly access to contacts). UK-based advisory services are equally likely to provide information that firms would otherwise have not been able to access.

Figure 11.7.2.2 Measure A92 Barriers Overcome – Constituent Elements
- By Service Used

<i>Proportion benefiting to a significant extent</i>	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Access to customers, partners, etc	45%	39%	42%	77%	40%
Access to info otherwise unable to come by	53%	40%	43%	54%	38%
Improved profile/ credibility	41%	35%	36%	69%	40%
Overcome a legal/ regulatory issue (<i>OMIS, Posts Sig Assists & HVO Sig Assists only</i>)	3%	14%	-	-	-

More established exporters (i.e. those exporting for over 10 years) are least likely to benefit from access to information or contacts and improved profile/credibility. This might suggest that newer exporters encounter more barriers (and hence have greater need for support to help overcome them), but this is not consistent with other UKTI survey data on barriers⁴⁶, which indicates that the likelihood of encountering significant barriers actually *increases* slightly among more experienced exporters.

Figure 11.7.2.3 Measure A92 Barriers Overcome – Constituent Elements
– By Number of Years Exporting

<i>Proportion benefiting to a significant extent</i>	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Access to customers, partners, etc	49%	48%	44%
Access to info otherwise unable to come by	52%	46%	42%
Improved profile/ credibility	46%	42%	39%
Overcome a legal/ regulatory issue (<i>OMIS, Posts Sig Assists & HVO Sig Assists only</i>)	13%	16%	13%

⁴⁶ Internationalisation Strategies, Barriers & Awareness Survey 2014, OMB Research (August 2014)

The table below summarises the two strongest 'barriers overcome' impacts for each UKTI service, along with the proportion of firms scoring 4-5 for each one.

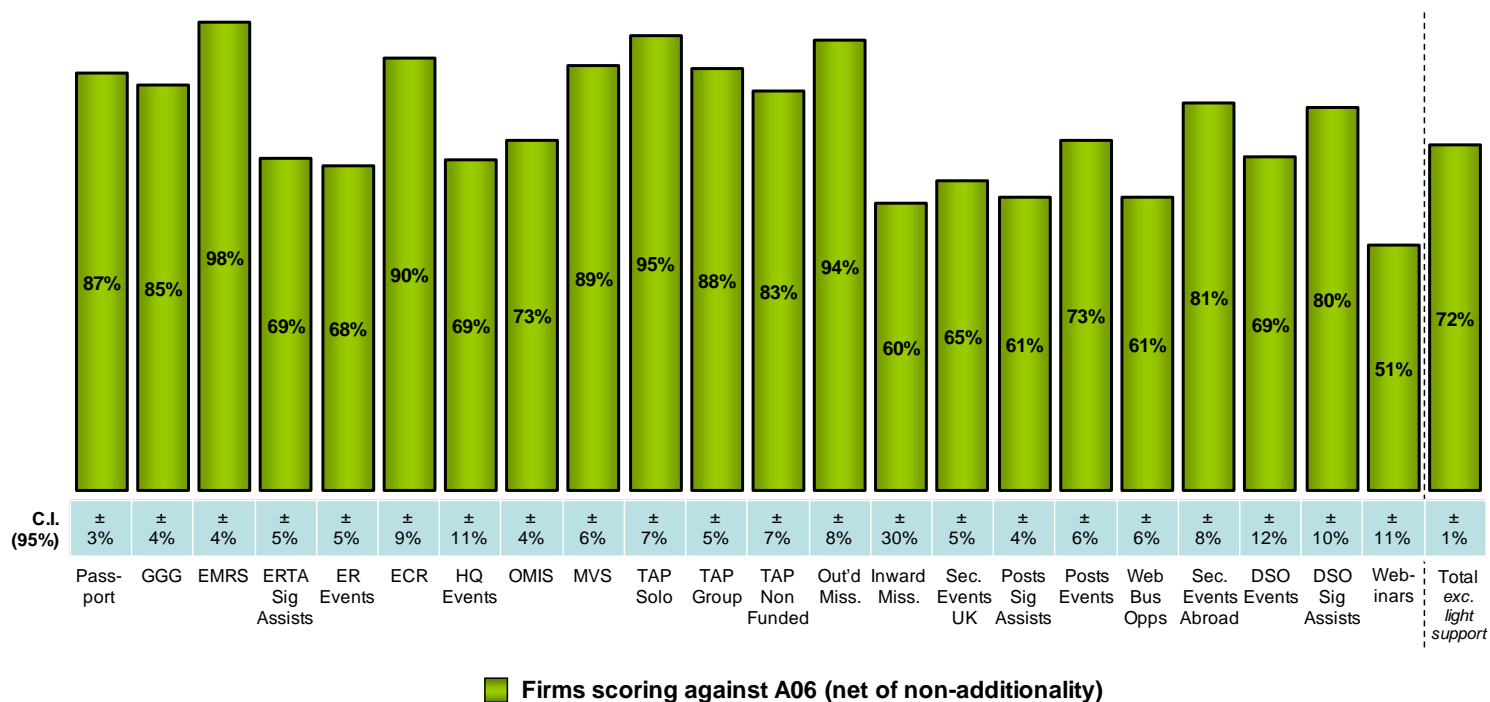
Figure 11.7.2.4 Measure A92 Barriers Overcome – Strongest Impacts

Sample Group	Strongest Impact	2 nd Strongest Impact
Passport	Access to information otherwise unable to come by (61%)	Access to prospective customers or business partners (58%)
GGG	Access to information otherwise unable to come by (54%)	Access to prospective customers or business partners (54%)
EMRS	Access to prospective customers or business partners (80%)	Improved your company's profile or credibility (73%)
ERTA Significant Assists	Access to information otherwise unable to come by (52%)	Access to prospective customers or business partners (40%)
ER Events	Access to information otherwise unable to come by (40%)	Access to prospective customers or business partners (27%)
ECR	Improved your company's profile or credibility (71%)	Access to information otherwise unable to come by (51%)
HQ Events	Access to information otherwise unable to come by (44%)	Access to prospective customers or business partners (39%)
OMIS	Access to prospective customers or business partners (53%)	Access to information otherwise unable to come by (45%)
MVS	Access to prospective customers or business partners (78%)	Access to information otherwise unable to come by (65%)
TAP Solo	Access to prospective customers or business partners (89%)	Improved your company's profile or credibility (82%)
TAP Group	Access to prospective customers or business partners (81%)	Improved your company's profile or credibility (72%)
TAP Non Funded	Access to prospective customers or business partners (69%)	Improved your company's profile or credibility (66%)
Outward Missions	Improved your company's profile or credibility (69%)	Access to prospective customers or business partners (66%)
Inward Missions	Access to prospective customers or business partners (40%)	Improved your company's profile or credibility (40%)
Sector Events UK	Access to information otherwise unable to come by (41%)	Access to prospective customers or business partners (39%)
Posts Significant Assists	Access to information otherwise unable to come by (38%)	Access to prospective customers or business partners (36%)
Posts Events	Access to prospective customers or business partners (46%)	Improved your company's profile or credibility (45%)
Website Business Opps	Access to information otherwise unable to come by (43%)	Access to prospective customers or business partners (40%)
Sector Events Abroad	Access to prospective customers or business partners (62%)	Improved your company's profile or credibility (54%)
DSO Events	Access to prospective customers or business partners (39%)	Access to information otherwise unable to come by (37%)
DSO Significant Assists	Improved your company's profile or credibility (53%)	Access to prospective customers or business partners (50%)
Webinars	Access to information otherwise unable to come by (26%)	Improved your company's profile or credibility (11%)

11.8 Significant Business Benefit – Measure A06

The chart below shows the proportion of supported businesses that anticipate benefiting from any of the qualitative impacts tested in PIMS, along with the associated confidence intervals. This analysis forms one of the key survey measures, namely 'Measure A06 – Significant Business Benefit'.

Figure 11.8.1 Measure A06 – Significant Business Benefit



Base: All respondents (Base) - Passport (360), GGG (362), EMRS (40), ERTA (360), ER Events (305), ECR (41), HQ Events (71), OMIS (380), MVS (96), TAP Solo (38), TAP Group (150), TAP Non Funded (102), Outward Missions (32), Inward Missions (10), Sector Events UK (297), Posts Sig Assists (617), Posts Events (201), Website Bus Opps (289), Sector Events Abroad (104), DSO Events (59), DSO Sig Assists (60), Webinars (80), Total excl. light support (3714)

Almost three quarters of firms (72%) are judged to experience one or more significant business benefits as a result of the UKTI support.

There is some difference across the various UKTI trade services in this respect, with results particularly positive for EMRS, TAP Solo and Outward Missions. The impact is lower for Posts Significant Assists, many of the event categories and, unsurprisingly, 'lighter touch' support (i.e. the Website Business Opportunities service and Webinars).

The panel below provides further details of how Measure A06 has been calculated for this survey.

A06 – Significant Business Benefit

Firms are classified as experiencing significant business benefits if they score 4-5 out of 5 for...

- Increased Skills (A81) – 55%
 - Improved your knowledge of the competitive environment in an overseas market – 40%
 - Or, gained new ideas about products, services, techniques or technologies – 25%
 - Or, improved your overseas marketing strategy – 37%
 - Or, improved your marketing research skills (EMRS only) – 50%
- Or Changed Behaviour (A83) – 60%
 - Introduced new products or services or made improvements to existing ones – 28%
 - Or, made improvements to your new product development strategy – 28%
 - Or, improved the way you do business in an overseas market – 37%
 - Or, improved your overseas marketing strategy – 37%
 - Or, gained the confidence to either explore a new market or expand in an existing one – 43%
- Or, Barriers to Market Access Overcome (A92) – 64%
 - Gained access to prospective customers or business partners – 47%
 - Or, gained access to information that you would otherwise have been unable to come by – 46%
 - Or, improved your company's profile or credibility – 42%
 - Or, overcome a particular problem or difficulty with a legal or regulatory issue or quality standards (*OMIS, Posts Sig Assists & HVO Sig Assists only*) – 14%

In each case net of non-additionality, so firms indicating that they 'would achieve similar results anyway' (D10) do not score against the measure.

The analysis below clearly demonstrates that tradeshow/mission attendees are most likely to experience significant business benefits, and firms accessing support through the overseas network are least likely to do so.

Figure 11.8.2 Measure A06 – Significant Business Benefit – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Proportion experiencing significant business benefit, net of non-additionality	75%	64%	70%	87%	70%

As seen below, firms with less than 2 years overseas experience are significantly more likely to report significant business benefits as a result of the UKTI support.

Figure 11.8.3 Measure A06 – Significant Business Benefit – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Proportion experiencing significant business benefit, net of non-additionality	76%	71%	70%

Innovative firms are also significantly more likely to experience significant business benefits as a result of the UKTI support. However, this difference disappears when using the tighter definition of innovation.

Figure 11.8.4 Measure A06 – Significant Business Benefit – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Proportion experiencing significant business benefit, net of non-additionality	73%	66%	73%	70%

Although firms on an upward growth trajectory appear more likely to benefit from the support, this difference is not statistically significant.

Figure 11.8.5 Measure A06 – Significant Business Benefit – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Proportion experiencing significant business benefit, net of non-additionality	67%	72%	73%

There are also no statistically significant differences by whether firms were 'born global' or started exporting at some point after they were established, or by age of firm.

Figure 11.8.6 Measure A06 – Significant Business Benefit
– By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Proportion experiencing significant business benefit, net of non-additionality	74%	72%	75%	73%	71%

However, there is evidence that micro SMEs are most likely to experience significant business benefits as a result of the UKTI support (particularly in comparison to large firms with 250+ employees).

Figure 11.8.7 Measure A06 – Significant Business Benefit
– By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Proportion experiencing significant business benefit, net of non-additionality	74%	71%	72%	68%

Echoing the above findings, firms with an annual turnover of less than £25million are more likely to score against this measure than larger companies.

Figure 11.8.8 Measure A06 – Significant Business Benefit
– By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Proportion experiencing significant business benefit, net of non-additionality	74%	73%	74%	66%	68%

There is no statistically significant difference between firms receiving support about high growth markets and those assisted with established markets when it comes to the proportion experiencing significant business benefits.

Figure 11.8.9 Measure A06 – Significant Business Benefit – By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Proportion experiencing significant business benefit, net of non-additionality	75%	74%

There is also no difference between firms with a business plan containing overseas targets and those with no business plan at all. However, firms that have a business plan that does not contain overseas targets are least likely to experience significant business benefits. There is no difference between firms with skilled owners, partners or directors and those without.

Figure 11.8.10 Measure A06 – Significant Business Benefit – By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Proportion experiencing significant business benefit, net of non-additionality	74%	66%	72%	73%	71%

There is little difference when looking at results by market sector.

Figure 11.8.11 Measure A06 – Significant Business Benefit – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Proportion experiencing significant business benefit, net of non-additionality	73%	71%	71%

11.9 Estimated Additional Profit – Measure A49

11.9.1 Estimated Additional Profit

An attempt has been made to measure the anticipated financial benefit to businesses of the UKTI support in terms of the additional profit it is likely to generate. To this end a key survey measure (A49) has been constructed, adopting the multi-stage approach detailed in the panel below.

A49 – £ Estimated Additional Profit

Stage 1

- Firms are first asked to estimate the anticipated financial gain to their business of the support received in terms of bottom-line profit.
 - Where respondents are unable to provide an exact figure, they are prompted with discreet ‘bands’ and the mid-point of this band is used in the calculation.
- Firms not reporting any significant benefit in terms of ‘Changed Behaviour (A83)’ or ‘Barriers Overcome (A92)’ are not asked for the expected financial benefit and are instead treated as £0.

Stage 2

- An additional questioning stage is incorporated to check that the figure provided does indeed relate to bottom-line profit or whether it actually refers to turnover.
- For those giving a figure in terms of turnover, these are converted to profit as follows:
 - Firms’ annual profit margin collected earlier in the interview is applied to the financial benefit figure.
 - If they did not provide their annual profit margin, the average profit margin is applied.

Stage 3

- Future expectations in respect of the financial benefits of the support are then accounted for, recognising the fact that overseas investment can often generate a return over a relatively long period of time.
- Firms are asked whether the financial benefit figure provided is an annual or total figure, and if an annual figure they are asked for how many years they expect it to continue.
 - The future benefit duration is capped at 10 years (even if firms indicate the financial benefits will continue for longer).
 - Where firms indicate the benefit will continue ‘indefinitely’ or ‘don’t know’ how long it will continue this is treated as 5 years.
 - An annual discounting rate of 8% is applied to all estimates of future benefits.

Stage 4

- All estimates of £ benefit are adjusted for additionality, based on the proportion of this benefit that the firm indicates they would expect to realise anyway had they not received the UKTI support.
 - In cases where no response was provided to this question the mean proportion realised anyway by those providing data is applied.

The table below provides details of the anticipated additional profit resulting from the support. Please note that firms attending ER Events of less than ½ day duration and those participating in Webinars are not asked these questions.

Figure 11.9.1.1 - Measure A49 - £ Estimated Additional Profit

	Total exc. light support	Pass-port	GGG	EMRS	ERTA Sig. Assists	ER Events (exc. < ½ day)	ECR
<i>Base</i>	3714	360	362	40	360	140	41
Mean additional profit (£)	205k	189k	139k	73k	303k	528k	183k
Confidence interval (95% level)	± 68k	±77k	±34k	±54k	±333k	±894k	±300k
Median additional profit (£)	0k	21k	23k	9k	0k	0k	16k
% reporting a positive £ benefit	41%	67%	61%	60%	41%	36%	63%
% reporting zero £ benefit	43%	22%	26%	25%	42%	41%	15%
% unable/unwilling to estimate	17%	11%	13%	15%	17%	23%	22%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	420k	252k	199k	103k	608k	1,140k	225k

	HQ Events	OMIS	MVS	TAP SOLO	TAP Group	TAP Non Fund	Out'd Miss.	In'd Miss.
<i>Base</i>	71	380	96	38	150	102	32	10
Mean additional profit (£)	138k	169k	141k	58k	90k	106k	96k	10k
Confidence interval (95% level)	±116k	±71k	±142k	±39k	±93k	±70k	±88k	±17k
Median additional profit (£)	0k	1k	11k	12k	10k	8k	5k	0k
% reporting a positive £ benefit	39%	45%	59%	76%	67%	57%	59%	20%
% reporting zero £ benefit	49%	43%	25%	13%	22%	24%	19%	60%
% unable/unwilling to estimate	11%	12%	16%	11%	11%	20%	22%	20%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	310k	331k	200k	68k	120k	150k	126k	40k

	Sector Events UK	Posts Sig. Assists	Posts Events	Web Bus Opps	Sector Events Abroad	DSO Events	DSO Sig. Assists	Webinars
<i>Base</i>	297	617	201	289	104	59	60	-
Mean additional profit (£)	144k	274k	149k	116k	110k	268k	90k	-
Confidence interval (95% level)	±118k	±215k	±118k	±86k	±97k	±393k	±74k	-
Median additional profit (£)	0k	0k	0k	0k	5k	0k	0k	-
% reporting a positive £ benefit	32%	28%	35%	31%	57%	29%	30%	-
% reporting zero £ benefit	48%	55%	45%	55%	29%	47%	43%	-
% unable/unwilling to estimate	19%	17%	19%	13%	14%	24%	27%	-
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	360k	807k	339k	321k	165k	709k	220k	-

The mean additional profit of the UKTI assistance is £205,000. However, the distribution of the financial benefit estimates derived via this approach are extremely skewed in nature, with the majority of firms reporting fairly modest or no impact on their profit, but a significant minority indicating very large benefits. Almost half of firms (43%) report zero financial benefit, but there is a small minority of firms (4%) that report additional profits in excess of £500,000 and this group have a very significant impact on the overall mean value.

The skew in the distribution is particularly evident from the mean and median values, with a median value of £0 at the total sample level even though the mean value is £205,000. As a result of this skewed distribution the confidence intervals associated with these estimates are high, particularly at an individual service level where base sizes are lower. The confidence interval for the overall mean UKTI benefit of £205,000 is +/- £68,000, meaning that we can be 95% confident that the true mean financial benefit of UKTI support lies between £137,000 and £273,000.

At this stage it should be noted that, where possible, all large financial benefit 'outliers' are identified at the analysis stage and re-contacted by the research team to confirm that the anticipated financial benefits are correct (to the best of their knowledge). More detail of the distribution of the additional profit figures and the number of outliers is provided later in this report (Section 11.9.4).

Based solely on the *mean* values, it appears that ER Events deliver the greatest financial benefits, with a mean additional profit of £528,000 (although it should be noted that this figure only relates to ER Events lasting more than half a day, as those attending shorter events are not asked the financial benefit questions). The mean additional profit figures are also high for ERTA Significant Assists, Posts Significant Assists and DSO Events. However, the high mean benefits reported for these groups are typically influenced by the presence of a small number of 'big wins' (i.e. firms reporting very large financial rewards), and the confidence intervals associated with these estimates are often very large. If just the *median* values are taken into account then GGG and Passport generate the greatest financial benefit with a median value of £23,000 and £21,000 respectively.

The following table shows the results separately for each broad category of UKTI assistance.

Figure 11.9.1.2 Measure A49 - £ Estimated Additional Profit – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Mean additional profit (£)	269k	238k	195k	105k	181k
Confidence interval (95% level)	±156k	±131k	±145k	±51k	±208k
Median additional profit (£)	3k	0k	0k	10k	0k
% reporting a positive £ benefit	49%	31%	36%	63%	28%
% reporting zero £ benefit	35%	52%	45%	23%	49%
% unable/unwilling to estimate	16%	16%	19%	15%	23%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	464k	634k	442k	143k	501k

The mean additional profit is highest for UK-based advisory services and the overseas network. However, these apparent differences are not statistically significant as the confidence intervals are high. Furthermore, although the mean benefit is lowest for tradeshows and missions, it is important to note that this type of support is actually most likely to lead to some level of financial benefit for participating firms (63% reported some degree of additional profit, with a median benefit of £10,000).

There are no major differences by export experience, although it is clear that even very recent exporters can see significant additional profits as a result of UKTI assistance.

Figure 11.9.1.3 Measure A49 - £ Estimated Additional Profit – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Mean additional profit (£)	199k	192k	219k
Confidence interval (95% level)	±69k	±117k	±128k
Median additional profit (£)	0k	1k	0k
% reporting a positive £ benefit	42%	44%	38%
% reporting zero £ benefit	40%	40%	46%
% unable/unwilling to estimate	19%	16%	16%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	387k	370k	489k

Innovative firms tend to see a greater financial impact from UKTI support than their non-innovative counterparts.

Figure 11.9.1.4 Measure A49 - £ Estimated Additional Profit – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Mean additional profit (£)	222k	95k	257k	109k
Confidence interval (95% level)	±78k	±67k	±102k	±38k
Median additional profit (£)	0k	0k	0k	0k
% reporting a positive £ benefit	42%	34%	42%	38%
% reporting zero £ benefit	42%	47%	41%	45%
% unable/unwilling to estimate	17%	19%	17%	17%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	446k	227k	511k	237k

Firms with ambitious growth aspirations also report significantly greater financial rewards from the UKTI support, and it may of course be the case that the level of financial benefit firms expect to see is influencing their overall growth objectives.

Figure 11.9.1.5 Measure A49 - £ Estimated Additional Profit – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Mean additional profit (£)	49k	86k	350k
Confidence interval (95% level)	±35k	±26k	±148
Median additional profit (£)	0k	0k	1k
% reporting a positive £ benefit	31%	42%	43%
% reporting zero £ benefit	48%	43%	39%
% unable/unwilling to estimate	21%	15%	18%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	124k	175k	667k

Firms that were 'born global' (and particularly those defined as 'born global' through the tighter definition) see significantly less financial benefit from the UKTI support than other young firms that started exporting at a later date. This might suggest that UKTI support can have the greatest impact among firms that are in the process of learning how best to export.

Figure 11.9.1.6 Measure A49 - £ Estimated Additional Profit – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Mean additional profit (£)	58k	99k	171k	138k	222k
Confidence interval (95% level)	±26k	±55k	±91k	±56k	±90k
Median additional profit (£)	2k	1k	1k	1k	0k
% reporting a positive £ benefit	48%	47%	44%	45%	39%
% reporting zero £ benefit	39%	40%	38%	39%	44%
% unable/unwilling to estimate	13%	13%	18%	16%	17%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	105k	182k	321k	257k	469k

There is also evidence that larger firms with 100+ employees tend to see more additional profit from UKTI support. However, this should be interpreted in the context of their overall turnover/profit levels, and it may well be that the proportional impact on profits is in fact greater for smaller firms (e.g. £175,000 additional profit for a micro SME may be more significant to them than £454,000 additional profit is to a large firm). It should also be noted that smaller firms are more likely to report *any* financial benefit from the support (44% of those with 0-9 employees compared to just 31% of those with 250+ employees).

Figure 11.9.1.7 Measure A49 - £ Estimated Additional Profit – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Mean additional profit (£)	175k	169k	304k	454k
Confidence interval (95% level)	±100k	±96k	±159	±495
Median additional profit (£)	1k	0k	0k	0k
% reporting a positive £ benefit	44%	41%	39%	31%
% reporting zero £ benefit	39%	44%	42%	51%
% unable/unwilling to estimate	17%	15%	19%	19%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	328k	351k	633k	1,202k

Similarly, there is also evidence firms with larger turnovers tend to see more additional profit from UKTI support (although this pattern is not as linear as that seen for the above analysis by number of employees). However, it is again the case that smaller firms (with a turnover of less than £25million) are more likely to report *any* financial benefit from the support.

Figure 11.9.1.8 Measure A49 - £ Estimated Additional Profit – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Mean additional profit (£)	186k	105k	274k	230k	1,543k
Confidence interval (95% level)	±129k	±52k	±134k	±121k	±2,723k
Median additional profit (£)	1k	1k	1k	0k	0k
% reporting a positive £ benefit	46%	44%	46%	34%	25%
% reporting zero £ benefit	38%	41%	42%	52%	51%
% unable/unwilling to estimate	16%	14%	13%	15%	23%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	339k	202k	526k	585k	4,657k

Although the data below suggests that support relating to high growth markets typically generates higher financial benefits, this apparent difference is not statistically significant.

Figure 11.9.1.9 Measure A49 - £ Estimated Additional Profit
– By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Mean additional profit (£)	329k	190k
Confidence interval (95% level)	±161k	±89k
Median additional profit (£)	0k	1k
% reporting a positive £ benefit	40%	46%
% reporting zero £ benefit	41%	39%
% unable/unwilling to estimate	18%	15%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	666k	349k

The analysis below shows that firms who are more strategic in their overseas approach (in the sense that they have a current written business plan containing overseas targets) typically realise larger financial benefits as a result of the UKTI support than those without a business plan. It is also true that firms with degree-level educated members of the senior management team forecast significantly greater financial benefits.

Figure 11.9.1.10 Measure A49 - £ Estimated Additional Profit
– By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Mean additional profit (£)	305k	77k	97k	247k	48k
Confidence interval (95% level)	±119k	±31k	±41k	±90k	±14k
Median additional profit (£)	1k	0k	0k	1k	0k
% reporting a positive £ benefit	44%	33%	43%	44%	40%
% reporting zero £ benefit	40%	50%	41%	40%	43%
% unable/unwilling to estimate	16%	17%	16%	15%	16%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	579k	192k	188k	472k	104k

As seen below, there is some indication that firms in the production sector see the greatest financial impact from UKTI support than those on the service sector (although this difference is only statistically significant at the 90% level of confidence rather than 95%). While the mean additional profit is highest for firms in 'other' sectors, the low base size and extremely large confidence interval associated with this estimate should be taken into account.

Figure 11.9.1.11 Measure A49 - £ Estimated Additional Profit – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Mean additional profit (£)	287k	148k	386k
Confidence interval (95% level)	±135k	±71k	±486k
Median additional profit (£)	1k	0k	0k
% reporting a positive £ benefit	43%	39%	29%
% reporting zero £ benefit	41%	43%	56%
% unable/unwilling to estimate	15%	18%	15%
<i>Mean additional profit (£) among those reporting positive £ benefit</i>	561k	308k	1,136k

11.9.2 Estimated Total Additional Profit

An attempt has been made to estimate the total additional profit generated by UKTI support over the last year. Details of the calculation approach are shown below.

£ Estimated Total Additional Profit	
Stage 1	
	<ul style="list-style-type: none">• Calculation of the mean £ estimated additional profit across the last year (A49 measure)
Stage 2	
	<ul style="list-style-type: none">• Aggregation of the number of individual firms supported in the last year (Annual A01 measure)<ul style="list-style-type: none">• Each firm is only counted once in the Annual A01, even if they have used multiple services in the last year.
Stage 3	
	<ul style="list-style-type: none">• The estimated total additional profit is calculated by multiplying the mean £ additional profit by the number of individual firms supported in the past year.

As seen below, this calculation estimates that the UKTI export support delivered in the last year will generate £6.5 billion of additional profit to UK businesses.

Figure 11.9.2.1 Estimated Total Additional Profit

	Total (exc. light support)
Mean additional profit (A49)	£205,000
Total number of firms supported (Annual A01)	£31,470
Estimated total additional profit	£6.5 billion

It should be noted that the mean additional profit figure (and hence the total grossed-up estimate) is heavily influenced by a small number of firms that report extremely high levels of financial benefit. This does not mean that the estimate is incorrect, and indeed this skewed distribution is common when evaluating business support programmes. However, it should be considered when interpreting the results. The following sections of this report (11.9.3 and 11.9.4) explore the distribution of financial benefit estimates and the impact of 'big wins' in more detail.

11.9.3 Additional Profit Distributions

The table below provides more details of the scale of the anticipated additional profit anticipated by supported firms.

Figure 11.9.3.1 - Additional Profit Distribution

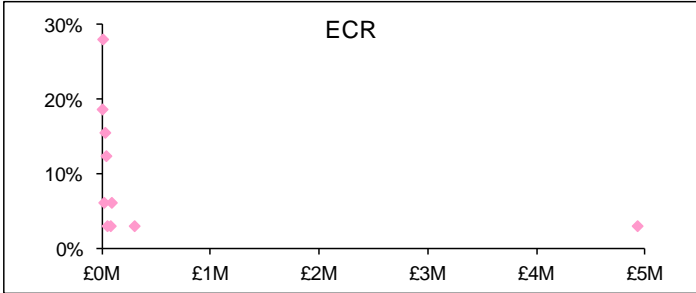
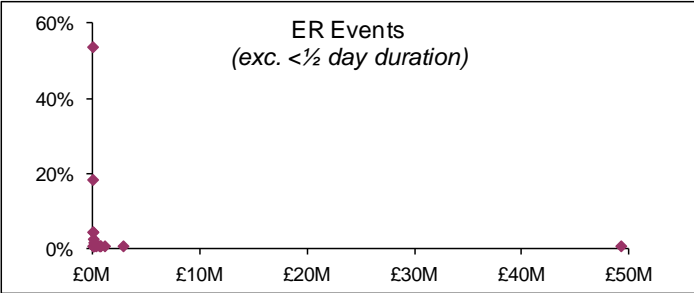
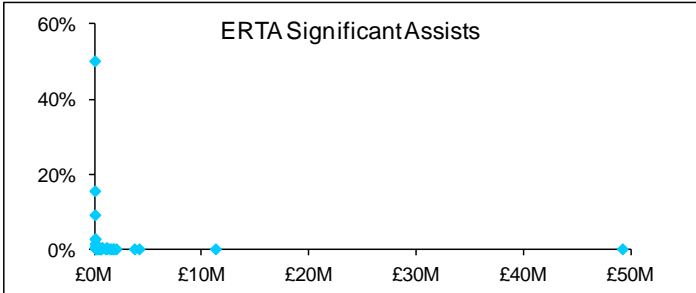
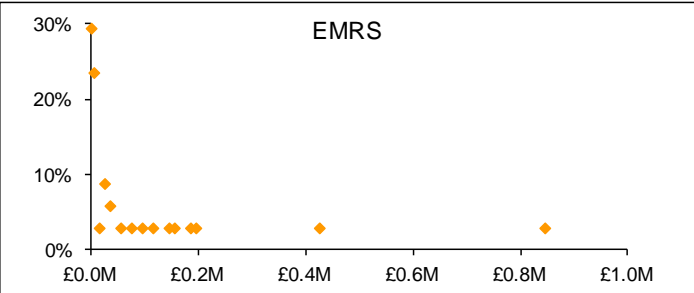
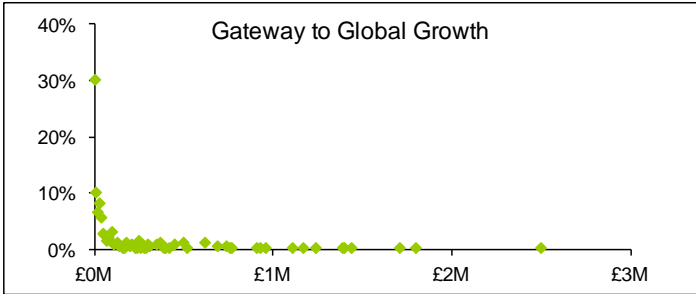
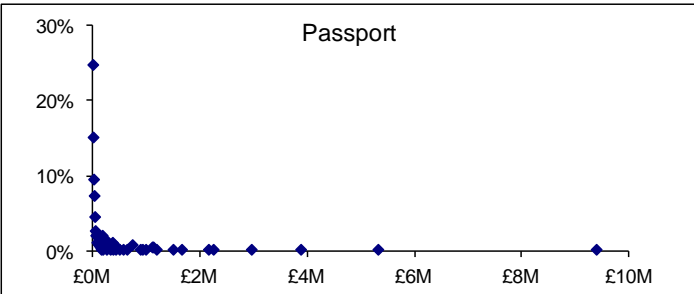
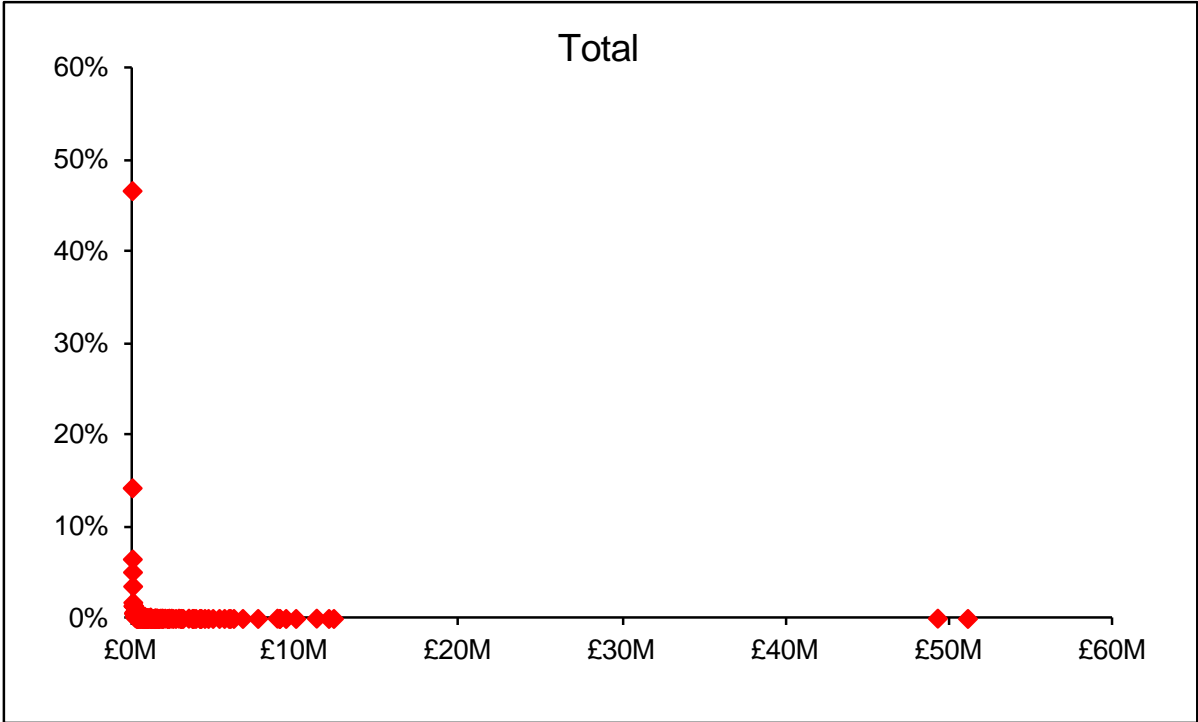
	Total exc. light support	Pass-port	GGG	EMRS	ERTA Sig. Assists	ER Events (exc. < ½ day)	ECR
Base	3714	360	362	40	360	140	41
Zero	43%	22%	26%	25%	42%	41%	15%
Up to £10,000	12%	14%	9%	20%	13%	14%	22%
£10,001-£50,000	13%	22%	20%	15%	14%	9%	29%
£50,001-£100,000	4%	8%	10%	8%	4%	4%	7%
£100,001-£500,000	7%	18%	15%	15%	5%	4%	2%
More than £500,000	4%	6%	6%	3%	5%	4%	2%
Don't know/ Refused	17%	11%	13%	15%	17%	23%	22%

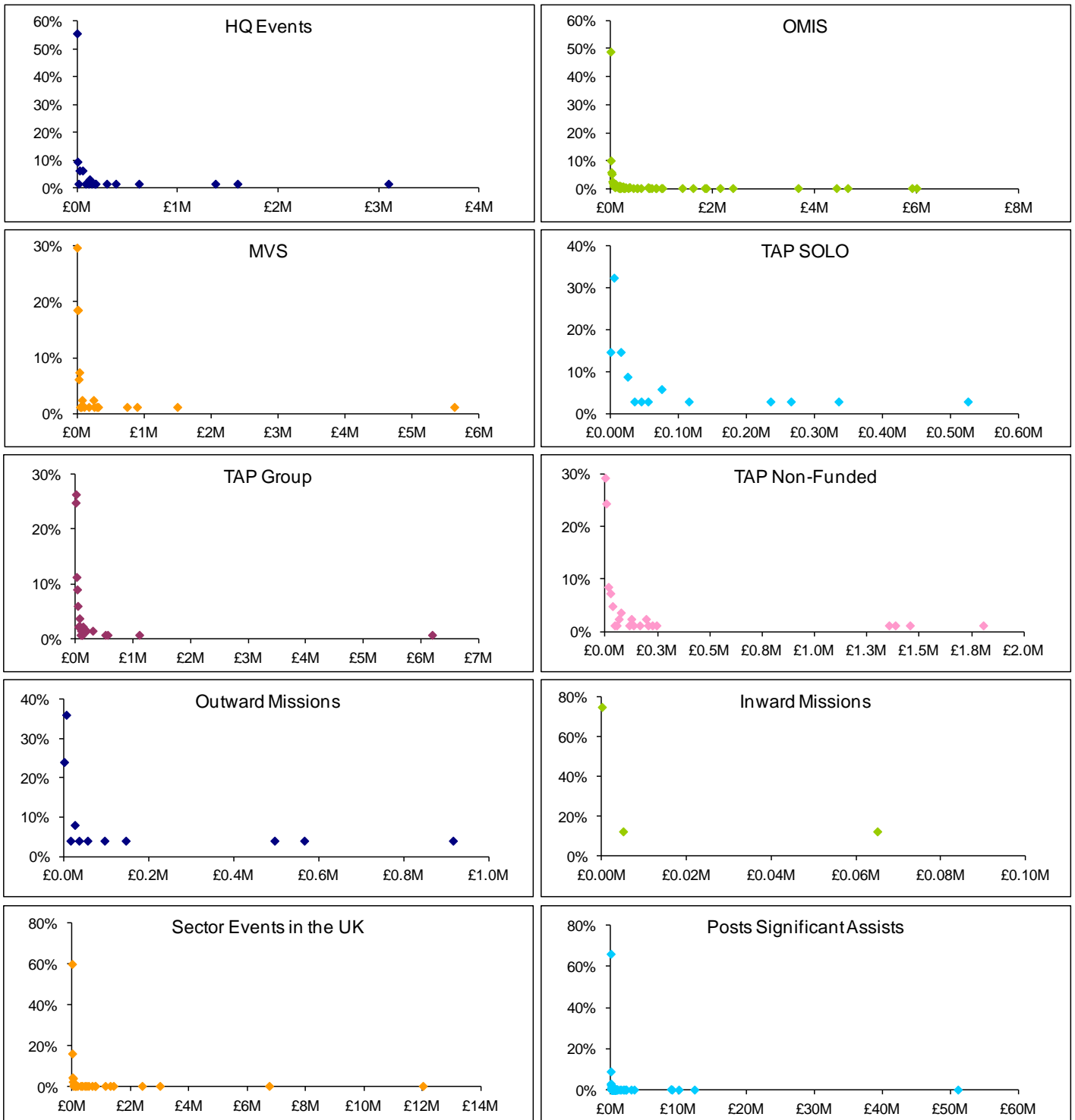
	HQ Events	OMIS	MVS	TAP SOLO	TAP Group	TAP Non Fund	Out'd Miss.	In'd Miss.
Base	71	380	96	38	150	102	32	10
Zero	49%	43%	25%	13%	22%	24%	19%	60%
Up to £10,000	8%	9%	16%	29%	23%	20%	28%	10%
£10,001-£50,000	7%	14%	28%	26%	25%	18%	13%	0%
£50,001-£100,000	7%	5%	4%	8%	9%	6%	6%	10%
£100,001-£500,000	11%	11%	7%	11%	6%	10%	6%	0%
More than £500,000	6%	6%	4%	3%	3%	4%	6%	0%
Don't know/ Refused	11%	12%	16%	11%	11%	20%	22%	20%

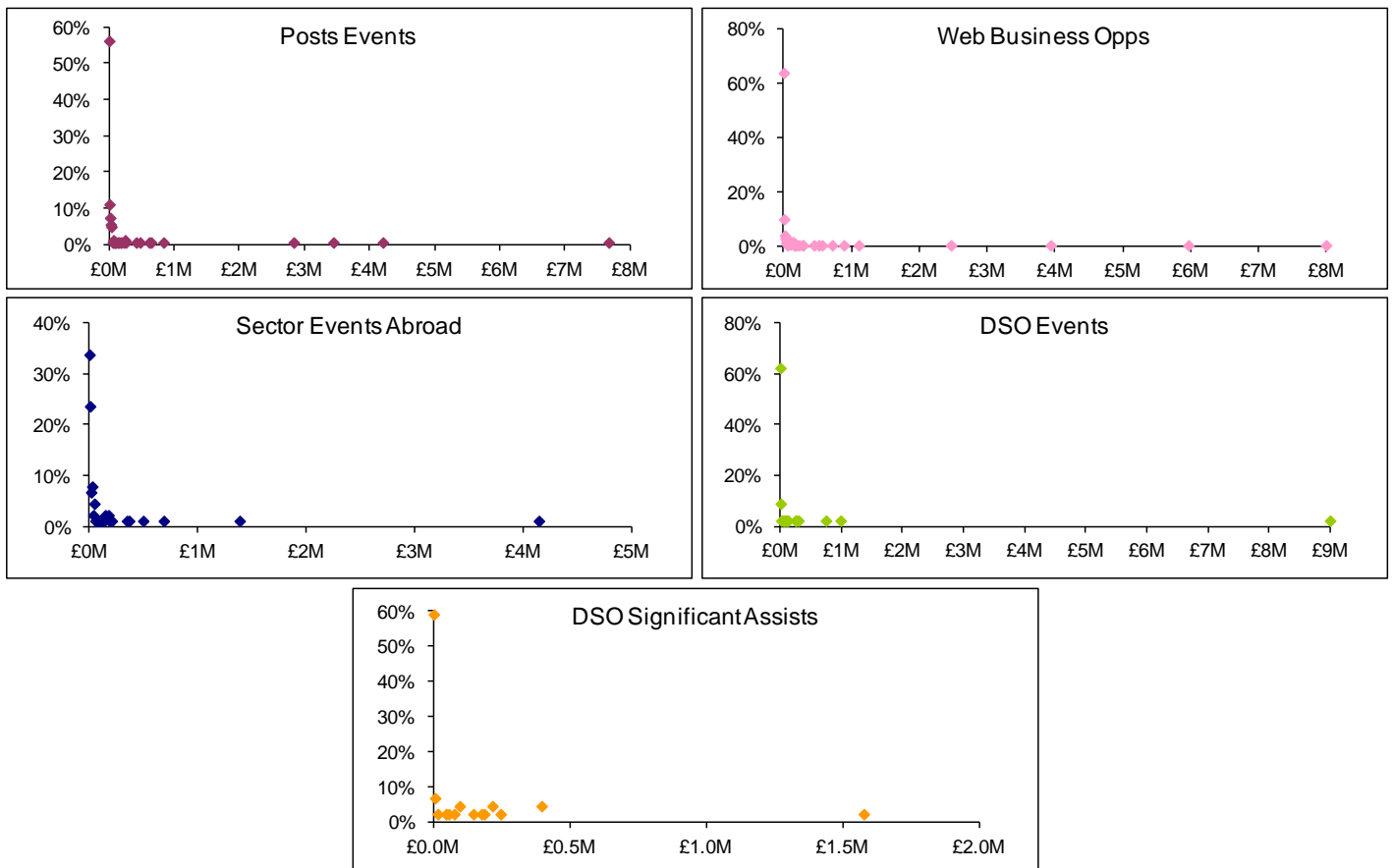
	Sector Events UK	Posts Sig. Assists	Posts Events	Web Bus Opps	Sector Events Abroad	DSO Events	DSO Sig. Assists	Web-inars
Base	297	617	201	289	104	59	60	-
Zero	48%	55%	45%	55%	29%	47%	43%	-
Up to £10,000	13%	7%	9%	9%	20%	7%	5%	-
£10,001-£50,000	9%	8%	14%	9%	18%	3%	3%	-
£50,001-£100,000	3%	3%	3%	5%	4%	5%	7%	-
£100,001-£500,000	3%	5%	5%	6%	12%	8%	13%	-
More than £500,000	4%	5%	3%	3%	3%	5%	2%	-
Don't know/ Refused	19%	17%	19%	13%	14%	24%	27%	-

Although over two-fifths (43%) of all UKTI clients do not anticipate any additional profit as a direct result of the support, 4% forecast an extremely large benefit in excess of £500,000 and a further 7% expect to see more than £100,000 additional profit.

The following charts provide a visual representation of the distributions of the estimated additional profit figures, and illustrate quite clearly the skewed nature of this distribution.







The table below shows the mean benefit recorded for each financial benefit 'banding', the % of all firms falling into that band and the % of the estimated total additional profit generated by UKTI that is accounted for by that group.

Figure 11.9.3.2 Contribution to Total UKTI Financial Benefit

	<i>Base (exc. light support)</i>	Mean additional profit	% of all firms	% of total UKTI £ benefit
Zero	1455	£0	43%	0%
Up to £10,000	445	£4,000	12%	0.3%
£10,001-£50,000	529	£25,000	13%	1.9%
£50,001-£100,000	196	£73,000	4%	1.9%
£100,001-£500,000	323	£231,000	7%	9.0%
More than £500,000	171	£3,456,000	4%	86.9%
Don't know refused	595	-	17%	-

Among the firms that report additional profits in excess of £500,000 the mean benefit is actually around £3.5million. While only 4% of firms fall into this category, cumulatively they account for 87% of the total additional profit generated by UKTI export support. This once again demonstrates the impact that these 'big wins' have on Measure A49.

As detailed above, the distribution of financial benefit is extremely skewed in nature. However, it should be noted that this pattern is typical of business populations and is also seen in the employee and turnover profiles of UKTI clients. The tables below show the distribution of employee numbers and annual turnover

Figure 11.9.3.3 Profile Distribution of UKTI Clients⁴⁷

UK employees (banded)	Mean no. of employees	% of all UKTI clients	% of total employees
0-249	29	92%	10%
250-4999	902	7%	22%
5000+ employees	17,021	1%	70%
Total	268	100%	100%
Annual turnover (banded)	Mean turnover	% of all UKTI clients	% of total turnover
Up to £2m	£0.5m	55%	1%
£2m-£25m	£7.8m	34%	10%
£25m-£500m	£100.9m	9%	34%
Over £500m	£834.5m	2%	55%
Total	£25.8m	100%	100%

As detailed above, the vast majority of UKTI clients (92%) are SMEs. However, this group only account for 10% of all staff employed by UKTI clients. Conversely, there is a small number of very large firms (just 1% of the UKTI client base) that each have over 5,000 UK staff and together account for 70% of the total employee numbers.

A similar pattern is also seen when it comes to the contribution towards the total sales/turnover of UKTI clients. Overall, 55% of firms have an annual turnover of less than £2 million but this group contribute just 1% of the total sales of all UKTI clients. Conversely, only 2% of UKTI clients have an annual turnover of more than £500 million, but this group accounts for 55% of the total turnover figure.

This analysis demonstrates that, although the financial benefit distribution is highly skewed, this pattern is also typical of business population profiles.

⁴⁷ For consistency with the financial benefit distributions, this analysis excludes firms receiving 'light' support.

11.9.4 'Big Wins'

In the following analysis the small subgroup of firms reporting very large additional profits (i.e. the outliers in the £ benefit distribution) has been studied, so that the profile of this group can be explored further. For the purposes of this analysis an anticipated additional profit of more than £3,000,000 has been classified as being a 'big win'. The table below provides an analysis of the number of 'big wins' recorded against each UKTI service in the last 4 waves, along with the proportion of all 'big wins' that this represents and, for comparative purposes, the proportion of all interviews conducted that are accounted for by that service.

Figure 11.9.4.1 Estimated Additional Profit 'Big Wins' – By Support Type

Service	Number of 'big wins' (£3million+)					PIMS 32-35	
	PIMS 32	PIMS 33	PIMS 34	PIMS 35	Total	% of all 'big wins'	% of all interviews
Passport	0	1	2	0	3	9%	10%
ERTA	2	1	1	0	4	12%	10%
ER Events (exc. <½ day)	0	0	0	1	1	3%	4%
ECR	0	1	0	0	1	3%	1%
HQ Events	0	1	0	0	1	3%	2%
OMIS	3	2	0	0	5	15%	10%
MVS	0	0	1	0	1	3%	3%
TAP Group	0	1	0	0	1	3%	4%
Sector Events UK	2	1	0	0	3	9%	8%
Posts Significant Assists	2	1	1	3	7	21%	17%
Post Events	0	1	0	2	3	9%	5%
Sector Events Abroad	0	0	0	1	1	3%	3%
DSO Events	0	0	1	0	1	3%	2%
UKIBC Significant Assists	1	1	0	0	2	6%	1%
Total	10	11	6	7	34	100%	80%

The number of firms reporting additional profit of £3million ranges from between 6 and 11 per quarterly PIMS wave. The proportion of the total number of 'big wins' recorded for each service across PIMS 32-35 is broadly in line with what would be expected given the proportion of interviews that they account for (e.g. Posts Significant Assists account for 21% of all 'big wins' and 17% of all interviews conducted).

The influence of these large outliers on the mean anticipated additional profit is clearly very significant, and this is demonstrated by the fact that if the 'big wins' (£3million+) were removed from the analysis, the overall mean additional profit would decrease from £205,000 to just £73,000.

It should be noted that as part of the data validation process all of the firms appearing in the outer tail of the additional profit distribution (i.e. reporting extremely large financial benefits) are re-contacted by the analysis team and their answers discussed in more detail to confirm their authenticity⁴⁸. This being the case, it is clearly

⁴⁸ Although please note that in some instances the respondent is unavailable during the analysis period or is unwilling to undergo further questioning on this area.

important that these significant (and validated) ‘big wins’ are included in the analysis of anticipated additional profit. However, their impact on the precise value of the overall mean must be borne in mind when interpreting results relating to financial benefits, and particularly when comparing groups of firms.

The following table gives details of the number of firms anticipating large additional profits in PIMS 32-35 according to their profile. In addition to showing the firms expecting additional profit of £3million or more, the table also includes analysis of those expecting a benefit of £500,000 or more.

Figure 11.9.4.2 Estimated Additional Profit ‘Big Wins’ – By Profile

	£3m+ Additional Profit		£500k+ Additional Profit		% of all interviews
	No. of £3m+ ‘big wins’	% of all £3m+ ‘big wins’	No. of £500k+ ‘big wins’	% of all £500k+ ‘big wins’	
Size (Number of Employees)					
Not yet trading	2	6%	4	2%	1%
0-9	11	32%	51	30%	43%
10-99	8	24%	73	43%	38%
100-249	7	21%	22	13%	8%
250+	6	18%	19	11%	7%
Innovative					
Yes	31	91%	157	92%	87%
No	3	9%	14	8%	13%
Innovative (Alternative)					
Yes	26	76%	122	71%	65%
No	8	24%	49	29%	35%
Years Exporting					
Not yet exporting	7	21%	19	11%	10%
< 2 years	4	12%	34	20%	15%
2-10 years	11	32%	56	33%	36%
> 10 years	12	35%	61	36%	39%
Growth Objectives (Next 5 Years)					
Grow substantially	25	74%	113	66%	45%
Grow moderately	7	21%	50	29%	46%
No growth	0	0%	2	1%	5%
Not yet trading	2	6%	4	2%	1%

The above analysis suggests that larger firms with 100 or more employees are disproportionately more likely to experience a very large financial benefit from the support, with these firms accounting for 38% of all £3million+ ‘big wins’ but only 15% of all interviews. A similar picture was seen in each of the previous 4 years. The same pattern is true, although to a lesser extent, when it comes to the likelihood of benefiting by £500,000 or more, with larger firms of 100+ employees accounting for 24% of the ‘big wins’ when defined in this way (compared to 15% of all interviews).

Those firms that expect ‘substantial’ growth over the next 5 years are also significantly more likely to report very high additional profits; 45% of all firms interviewed expect substantial growth but this group accounts for 74% of all the £3million+ ‘big wins’ and 66% of the £500,000+ ‘big wins’. This suggests that the

UKTI support (and the associated financial gain) is having a positive influence on firms' growth expectations and aspirations.

Firms classified as being innovative under the tighter definition are also more likely to see large financial benefits from the support; 65% of all firms are classified as innovative but this group accounts for 76% of all the £3million+ 'big wins' and 71% of the £500,000+ 'big wins'. Firms that are not yet exporting are also disproportionately likely to fall into the £3million+ additional profit group.

The table below provides details of the number of 'big wins' (£3million+ benefits) recorded for each UKTI service over the last 5 years and demonstrates that this has been broadly consistent (with the exception of an increase in the PIMS 20-23 period)

Figure 11.9.4.3 Estimated Additional Profit 'Big Wins' - Over Time by Support Type

	Number of 'big wins' (£3million+)				
	PIMS 16-19 (2009)	PIMS 20-23 (2010)	PIMS 24-27 (2011)	PIMS 28-31 (2012)	PIMS 32-35 (2013)
Passport	3	4	7	1	3
GGG	0	5	3	4	0
EMRS	0	0	0	0	0
ERTA Significant Assists	0	4	4	0	4
ER Events > ½ day	0	0	3	0	1
ECR	0	0	0	0	1
HQ Events	0	1	0	0	1
OMIS	3	6	2	6	5
MVS	2	5	0	0	1
TAP SOLO	0	0	0	0	0
TAP Group	0	0	0	0	1
TAP Non-Funded	0	1	0	0	0
Outward Missions	2	0	0	2	0
Inward Missions	0	1	1	1	0
Sector Events UK	1	3	4	5	3
Special Reports	0	1	0	0	0
Posts Significant Assists	13	9	7	5	7
Posts Events	1	2	0	1	3
Web Bus Opps	0	0	0	0	0
Sector Events Abroad	1	3	2	0	1
DSO Events	3	1	1	0	1
DSO Significant Assists	4	5	4	4	0
CBBC Significant Assists	0	0	1	1	0
FSI Events	0	1	-	-	-
CBBC Events	0	0	0	1	0
UKIBC Significant Assists	0	0	0	2	2
UKIBC Events	0	0	0	1	0
Total	33	52	39	36	34
<i>Total number of interviews</i>	<i>4158</i>	<i>4190</i>	<i>4419</i>	<i>4309</i>	<i>4248</i>

The following table below provides details of the number of outliers (£3million+ benefits) over time, by company profile.

Figure 11.9.4.4 Estimated Additional Profit 'Big Wins' - Over Time by Profile

	Number of 'big wins' (£3million+)				
	PIMS 16-19 (2009)	PIMS 16-19 (2009)	PIMS 16-19 (2009)	PIMS 16-19 (2009)	PIMS 16-19 (2009)
Size (Number of Employees)					
Not yet trading	2	2	3	2	2
0-9	9	15	10	4	11
10-99	10	16	11	17	8
100-249	4	9	4	4	7
250+	8	10	11	9	6
Innovative					
Yes	29	46	32	29	31
No	4	6	7	7	3
Innovative (Alternative)					
Yes	25	37	26	28	26
No	8	15	13	8	8
Years Exporting					
Not yet exporting	4	9	7	7	7
< 2 years	5	4	11	8	4
2-10 years	11	17	5	6	11
> 10 years	13	22	15	15	12

11.9.5 Links between Estimated Additional Profit & Other Measures

The table below provides details of the proportion of firms scoring against the key impact measures, analysed by the level of financial benefit they expect to receive as a result of the support.

Figure 11.9.5.1 Key Impact Measures – By £ Estimated Additional Profit

Key Impacts	£ Estimated Additional Profit							
	Total	Zero	Up to £10k	£10k - £50k	£50k - £100k	£100k- £500k	More than £500k	Don't know/ refused
<i>Base: Exc. light support</i>	3714	1455	445	529	196	323	171	595
Imp. Business Performance	53%	25%	70%	83%	88%	90%	84%	58%
A81 – Increased Skills	55%	23%	80%	81%	82%	87%	83%	72%
A83 – Changed Behaviour	60%	23%	87%	90%	92%	95%	93%	81%
A92 – Barriers Overcome	64%	26%	92%	93%	94%	94%	96%	89%
A06 – Sig. Business Benefit	72%	33%	100%	100%	100%	100%	100%	100%
Increased Employees	25%	7%	25%	41%	49%	60%	68%	24%

It is clear from the above analysis that firms that do not gain any financial benefit from the support are much less likely to score against the other key impact measures. Generally, the greater the anticipated additional profit, the more likely firms are to score against the other measures.

There is also a strong relationship between the level of financial benefit expected and the likelihood of firms' increasing their employee numbers. Well over half of those firms anticipating a financial gain of more than £100,000 expect to increase their staffing levels as a result of the UKTI support, suggesting that these firms may *need* to take on more staff to be in a position to realise the additional profit resulting from the UKTI support.

The following table provides an alternative analysis, this time looking at the additional profit by whether or not firms scored against the other impact measures.

Figure 11.9.5.2 £ Estimated Additional Profit – By Key Impact Measures

£ Estimated Additional Profit	Key Measures					
	Imp. Bus. Performance		Increased Skills (A81)		Changed Behaviour (A83)	
	Yes	No	Yes	No	Yes	No
<i>Base: Exc. light support</i>	2114	1573	2169	1518	2381	1306
Zero	20%	67%	17%	73%	16%	82%
Up to £10,000	16%	8%	18%	6%	18%	4%
£10,001-£50,000	20%	5%	19%	5%	19%	3%
£50,001-£100,000	7%	1%	7%	2%	7%	1%
£100,001-£500,000	11%	2%	11%	2%	10%	1%
More than £500,000	7%	1%	6%	2%	7%	1%
Don't know/ Refused	18%	16%	22%	11%	23%	8%
<i>Mean additional profit (£)</i>	<i>352k</i>	<i>44k</i>	<i>319k</i>	<i>86k</i>	<i>333k</i>	<i>44k</i>
<i>Median additional profit (£)</i>	<i>15k</i>	<i>0k</i>	<i>14k</i>	<i>0k</i>	<i>15k</i>	<i>0k</i>
£ Estimated Additional Profit	Barriers Overcome (A92)		Sig. Bus. Benefit (A06)		Increased Employees	
	Yes	No	Yes	No	Yes	No
<i>Base</i>	<i>2458</i>	<i>1229</i>	<i>2767</i>	<i>920</i>	<i>1108</i>	<i>2606</i>
Zero	17%	87%	20%	100%	13%	52%
Up to £10,000	18%	3%	17%	0%	12%	12%
£10,001-£50,000	19%	3%	18%	0%	21%	10%
£50,001-£100,000	7%	1%	6%	0%	9%	3%
£100,001-£500,000	10%	1%	9%	0%	16%	4%
More than £500,000	6%	1%	6%	0%	12%	2%
Don't know/ Refused	24%	5%	24%	0%	18%	17%
<i>Mean additional profit (£)</i>	<i>335k</i>	<i>19k</i>	<i>312k</i>	<i>0k</i>	<i>569k</i>	<i>85k</i>
<i>Median additional profit (£)</i>	<i>14k</i>	<i>0k</i>	<i>11k</i>	<i>0k</i>	<i>36k</i>	<i>0k</i>

There is a clear link between the other impact measures and the amount of financial benefit realised, with firms much more likely to report (higher) additional profits if they score against these other measures.

This is particularly true of those increasing their employee numbers as a result of the support, with a mean additional profit of £569,000 for this group.

The table below analyses the level of anticipated additional profit by how firms rated the quality of the support they received.

Figure 11.9.5.3 £ Estimated Additional Profit – By Quality Rating (A09)

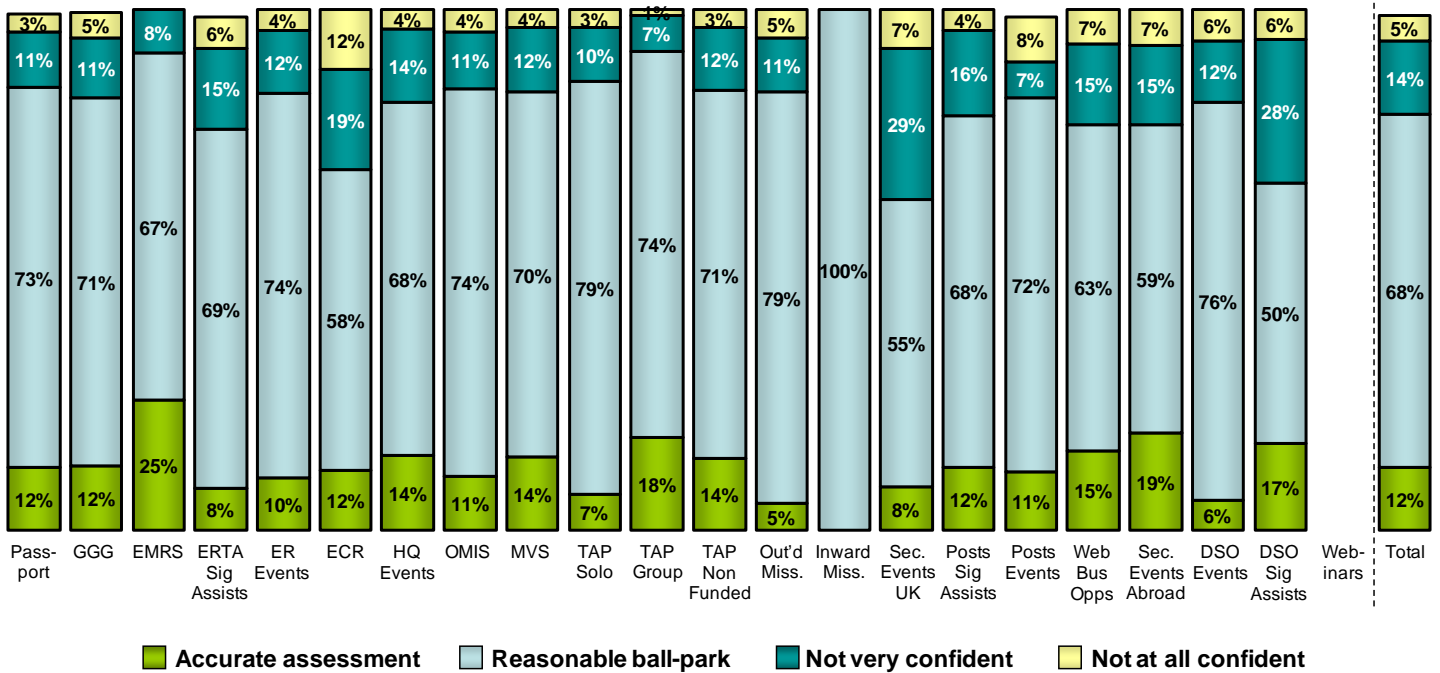
£ Estimated Additional Profit	Quality Rating		
	4-5 out of 5 for <u>all</u> of the quality elements	4-5 out of 5 for <u>some</u> of the quality elements	4-5 out of 5 for <u>none</u> of the quality elements
<i>Base: Exc. light support</i>	1902	1690	122
Zero	30%	51%	86%
Up to £10,000	13%	12%	5%
£10,001-£50,000	17%	10%	2%
£50,001-£100,000	5%	4%	0%
£100,001-£500,000	8%	5%	2%
More than £500,000	6%	3%	0%
Don't know/ Refused	21%	15%	5%
<i>Mean additional profit (£)</i>	<i>276k</i>	<i>162k</i>	<i>4k</i>
<i>Median additional profit (£)</i>	<i>7k</i>	<i>0k</i>	<i>0k</i>

There is also a clear link between the quality of support delivery and the likelihood of firms benefiting from additional profits. The mean additional profit for firms giving 'good' scores of 4-5 out of 5 for all of the service aspects rated is £276,000 compared to just £4,000 for those not scoring 4-5 for any of the service aspects.

11.9.6 Accuracy of Estimates

Respondents were asked to assess the accuracy of the assessment they had provided during the interview of the financial gains associated with the UKTI support. Please note that this question was only asked to those anticipating a positive financial benefit, and the analysis below is therefore based just on this group.

Figure 11.9.6.1 Accuracy of Estimates



Base: All reporting a positive £ benefit (Base, Don't know) - Passport (242, 1%), GGG (219, 0%), EMRS (24, 0%), ERTA (149, 1%), ER Events (50, 0%), ECR (26, 0%), HQ Events (28, 0%), OMIS (171, 0%), MVS (57, 0%), TAP Solo (29, 0%), TAP Group (100, 0%), TAP Non-Funded (58, 0%), Outward Missions (19, 0%), Inward Missions (2, 0%), Sector Events UK (96, 0%), Posts Significant Assists (173, 0%), Posts Events (71, 1%), Website Bus Opps (91, 0%), Sector Events Abroad (59, 0%), DSO Events (17, 0%), DSO Significant Assists (18, 0%), Total (1755, 0%)

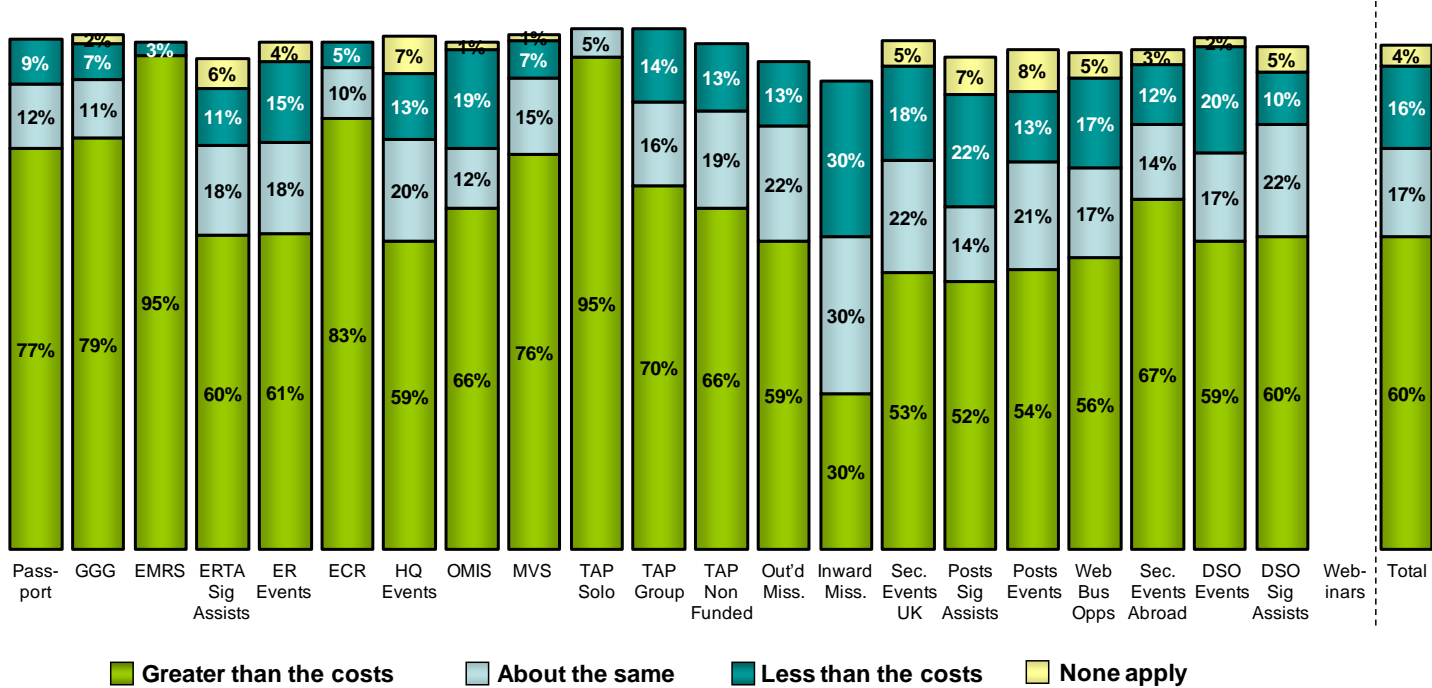
Firms can have difficulty in forecasting the likely financial benefits of the UKTI support as this can be affected by many different/external factors (e.g. the number of contracts likely to be won, the wider economic climate, the proportion of any financial benefit that can be attributed to the UKTI support in question, etc).

This is demonstrated by the fact that only 12% claimed that the financial data they provided during the survey was an 'accurate assessment'. However, although they recognise that it may not be absolutely accurate, the vast majority of firms do feel that they were able to provide a 'reasonable ball park estimate' of the financial benefits associated with the UKTI support.

11.9.7 Whether Benefits Will Outweigh Costs

Prior to being asked to quantify the financial impact of the UKTI support, firms were first asked whether they anticipated that the financial gains would be greater or less than the costs they had incurred.

Figure 11.9.7.1 Whether Benefits Will Outweigh Costs



Base: All except Webinar attendees (Base, Don't know/None apply, Signposted only) - Passport (360, 2%, 0%), GGG (362, 1%, 0%), EMRS (40, 3%, 0%), ERTA (360, 3%, 3%), ER Events (305, 3%, 0%), ECR (41, 2%, 0%), HQ Events (71, 1%, 0%), OMIS (380, 3%, 0%), MVS (96, 1%, 0%), TAP Solo (38, 0%, 0%), TAP Group (150, 0%, 0%), TAP Non-Funded (102, 3%, 0%), Outward Missions (32, 6%, 0%), Inward Missions (10, 10%, 0%), Sector Events UK (297, 2%, 0%), Posts Significant Assists (617, 3%, 3%), Posts Events (201, 4%, 0%), Website Bus Opps (289, 5%, 0%), Sector Events Abroad (104, 4%, 0%), DSO Events (59, 2%, 0%), DSO Significant Assists (60, 2%, 2%), Total (4168, 3%, 1%)

The vast majority of firms (60%) are expecting that the financial benefits of the UKTI assistance will exceed the costs, and just 16% believe that they will be less than the costs.

As seen in the earlier analysis of Measure A49 (Section 11.9.1) 41% of firms reported a positive financial benefit from the support, 17% were unwilling/unable to estimate the financial benefit and 43% reported zero benefit. The fact that 60% of firms expect the benefits to be greater than the costs strongly suggests that those firms who are unable/unwilling to estimate the financial benefit are still expecting it to have a net positive impact (but just cannot quantify it).

11.10 Estimated Additional Sales

11.10.1 Estimated Additional Sales

An estimate of the additional sales/turnover generated by UKTI clients as a result of the support has also been calculated, as detailed below.

£ Estimated Additional Sales	
•	The value of additional sales is calculated by taking each firm's estimated additional profit figure (Measure A49) and converting this from profit into <u>turnover</u> .
•	Some firms initially give an estimated financial benefit in terms of turnover, in which case this figure is used.
•	For those firms that give an estimated financial benefit in terms of profit, their profit figure is converted to turnover using their overall profit margin. <ul style="list-style-type: none"> • If firms have not provided details of their overall profit margin (e.g. don't know/refused or breaking even/making a loss) then the mean profit margin for all firms interviewed in that quarter is used.
•	The remaining stages mirror those employed in the calculation of the estimated additional profit (see Section 11.9.1)

The table below provides details of the anticipated additional sales resulting from the support. Please note that ER Events of less than ½ day are excluded from this analysis.

Figure 11.10.1.1 - £ Estimated Additional Sales

	Total exc. light support	Pass-port	GGG	EMRS	ERTA Sig. Assists	ER Events (exc. < ½ day)	ECR
<i>Base</i>	3714	360	362	40	360	140	41
Mean additional sales (£)	1,992k	1,329k	1,220k	587k	3,555k	3,780k	949k
Confidence interval (95% level)	± 940k	± 531k	± 380k	± 43k	±4,994k	±6,383k	±1,501k
Median additional sales (£)	0k	136k	170k	63k	0k	0k	77k
% reporting a positive £ benefit	41%	67%	61%	60%	41%	36%	63%
% reporting zero £ benefit	43%	22%	26%	25%	42%	41%	15%
% unable/unwilling to estimate	17%	11%	13%	15%	17%	23%	22%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	4,084k	1,768k	1,750k	831k	7,135k	8,164k	1,168k

Figure 11.10.1.1 - £ Estimated Additional Sales (Cont'd)

	HQ Events	OMIS	MVS	TAP SOLO	TAP Group	TAP Non Fund	Out'd Miss.	In'd Miss.
<i>Base</i>	71	380	96	38	150	102	32	10
Mean additional sales (£)	948k	1,501k	1,262k	490k	625k	813k	704k	69k
Confidence interval (95% level)	± 816k	± 837k	±1,396k	± 364k	± 663k	± 530k	± 647k	± 121k
Median additional sales (£)	0k	4k	71k	66k	55k	52k	35k	0k
% reporting a positive £ benefit	39%	45%	59%	76%	67%	57%	59%	20%
% reporting zero £ benefit	49%	43%	25%	13%	22%	24%	19%	60%
% unable/unwilling to estimate	11%	12%	16%	11%	11%	20%	22%	20%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	2,132k	2,949k	1,793k	574k	832k	1,149k	926k	275k

	Sector Events UK	Posts Sig. Assists	Posts Events	Web Bus Opps	Sector Events Abroad	DSO Events	DSO Sig. Assists	Webinars
<i>Base</i>	297	617	201	289	104	59	60	-
Mean additional sales (£)	1,077k	3,600k	1,193k	538k	474k	2,323k	637k	-
Confidence interval (95% level)	±1,077k	±4,007k	±1,064k	± 366k	± 255k	±2,767k	± 530k	-
Median additional sales (£)	0k	0k	0k	0k	35k	0k	0k	-
% reporting a positive £ benefit	32%	28%	35%	31%	57%	29%	30%	-
% reporting zero £ benefit	48%	55%	45%	55%	29%	47%	43%	-
% unable/unwilling to estimate	19%	17%	19%	13%	14%	24%	27%	-
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	2,694k	10,654k	2,723k	1,484k	715k	6,150k	1,558k	-

The mean additional sales resulting from the UKTI assistance is £1,992,000. However, the confidence interval for the overall mean additional sales is +/- £940,000. This means that we can be 95% confident that the true mean additional sales figure lies between £1,052,000 and £2,932,000.

It should be noted that the distribution of these additional sales figures is skewed in nature and includes some very large 'outliers' that report extremely high financial benefits. These have a significant impact on the mean figures, and the majority of firms report fairly modest or no impact on their sales (and the median is £0). The impact of these 'big wins' is explored in more detail in the previous section of this report in relation to the additional profit estimates, and the same issues and considerations apply to the additional sales estimates.

Based solely on the mean value, it appears that ERTA Significant Assists, ER Events and Posts Significant Assists generate the greatest additional sales for supported firms. However, when interpreting these findings the high confidence intervals and low base sizes for some services should be considered. When the median values are examined, the GGG and Passport schemes emerge as the top services (with median benefits of £170,000 and £136,000 respectively).

The following table shows these results separately for the broad categories of UKTI assistance. The mean additional sales are highest for those using UK-based advisory services and the overseas network, but the large confidence intervals should be taken into account when interpreting this data. Based on the median additional sales, results are most positive for tradeshows/missions (and almost two-thirds of this group report some level of additional sales).

Figure 11.10.1.2 £ Estimated Additional Sales – By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Mean additional sales (£)	2,958k	2,794k	1,413k	816k	1,588k
Confidence interval (95% level)	± 2,319k	± 2,375k	± 1,042k	± 429k	± 1,500k
Median additional sales (£)	19k	0k	0k	66k	0k
% reporting a positive £ benefit	49%	31%	36%	63%	28%
% reporting zero £ benefit	35%	52%	45%	23%	49%
% unable/unwilling to estimate	16%	16%	19%	15%	23%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	5,104k	7,469k	3,195k	1,112k	4,390k

The mean additional sales figure is highest for firms that have been exporting for more than 10 years. However, although the confidence interval is extremely high for this group suggesting that it contains some very large ‘outliers’ who are driving up the mean value. It is also worth noting that firms with less than 10 years export experience are actually more likely to report *any* positive financial benefit.

Figure 11.10.1.3 £ Estimated Additional Sales – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Mean additional sales (£)	1,332k	1,567k	2,749k
Confidence interval (95% level)	± 259k	± 869k	± 2,225k
Median additional sales (£)	2k	5k	0k
% reporting a positive £ benefit	42%	44%	38%
% reporting zero £ benefit	40%	40%	46%
% unable/unwilling to estimate	19%	16%	16%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	2,596k	3,015k	6,135k

Innovative firms are more likely to benefit from additional sales than their non-innovative counterparts.

Figure 11.10.1.4 £ Estimated Additional Sales – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Mean additional sales (£)	2,217k	539k	2,571k	911k
Confidence interval (95% level)	± 1,081k	± 420k	± 1,426k	± 363k
Median additional sales (£)	0k	0k	1k	0k
% reporting a positive £ benefit	42%	34%	42%	38%
% reporting zero £ benefit	42%	47%	41%	45%
% unable/unwilling to estimate	17%	19%	17%	17%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	4,446k	1,293k	5,111k	1,986k

Firms with the most ambitious growth objectives report the highest additional sales, particularly in comparison to those who do not anticipate any growth at all over the next 5 years. This might suggest that the UKTI support, and the associated impact on sales, is influencing firms' growth aspirations.

Figure 11.10.1.5 £ Estimated Additional Sales – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Mean additional sales (£)	362k	778k	3,558k
Confidence interval (95% level)	± 250k	± 244k	± 2,080k
Median additional sales (£)	0k	0k	9k
% reporting a positive £ benefit	31%	42%	43%
% reporting zero £ benefit	48%	43%	39%
% unable/unwilling to estimate	21%	15%	18%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	917k	1,586k	6,778k

Firms that were 'born global' report slightly lower additional sales than other young firms. The mean additional sales are also higher for older firms than those that have been trading for less than 5 years.

Figure 11.10.1.6 £ Estimated Additional Sales – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Mean additional sales (£)	368k	831k	1,096k	974k	2,325k
Confidence interval (95% level)	± 169k	± 525k	± 570k	± 393k	± 1,267k
Median additional sales (£)	14k	8k	5k	7k	0k
% reporting a positive £ benefit	48%	47%	44%	45%	39%
% reporting zero £ benefit	39%	40%	38%	39%	44%
% unable/unwilling to estimate	13%	13%	18%	16%	17%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	<i>665k</i>	<i>1,535k</i>	<i>2,052k</i>	<i>1,816k</i>	<i>4,912k</i>

There is evidence that larger firms tend to benefit from higher additional sales as a result of UKTI support. However, it should be noted that although the mean benefit is higher, large firms are actually less likely to report any positive financial benefit.

Figure 11.10.1.7 £ Estimated Additional Sales – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Mean additional sales (£)	1,276k	1,985k	2,739k	5,879k
Confidence interval (95% level)	± 716k	± 1,832k	± 1,539k	± 7,516k
Median additional sales (£)	5k	0k	0k	0k
% reporting a positive £ benefit	44%	41%	39%	31%
% reporting zero £ benefit	39%	44%	42%	51%
% unable/unwilling to estimate	17%	15%	19%	19%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	<i>2,399k</i>	<i>4,114k</i>	<i>5,698k</i>	<i>15,550k</i>

There are less clear or consistent differences by turnover. Very large firms with an annual turnover in excess of £500million do report extremely high additional sales (a mean of almost £25million), but the confidence interval associated with this figure is very high. Smaller firms with a turnover of less than £25million are most likely to report *any* positive financial benefit.

Figure 11.10.1.8 £ Estimated Additional Sales – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Mean additional sales (£)	1,370k	746k	3,135k	1,859k	24,762k
Confidence interval (95% level)	± 927k	± 373k	± 2,476k	± 851k	± 41,938k
Median additional sales (£)	7k	8k	8k	0k	0k
% reporting a positive £ benefit	46%	44%	46%	34%	25%
% reporting zero £ benefit	38%	41%	42%	52%	51%
% unable/unwilling to estimate	16%	14%	13%	15%	23%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	2,503k	1,438k	6,026k	4,721k	74,731k

There is some indication that firms receiving support in relation to high growth markets see a greater impact on their sales than those targeting established markets, although this difference is not statistically significant.

Figure 11.10.1.9 £ Estimated Additional Sales – By Markets to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Mean additional sales (£)	3,496k	1,384k
Confidence interval (95% level)	± 2,294k	± 639k
Median additional sales (£)	0k	8k
% reporting a positive £ benefit	40%	46%
% reporting zero £ benefit	41%	39%
% unable/unwilling to estimate	18%	15%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	7,080k	2,548k

Firms with a business plan containing overseas targets report the highest mean additional sales. The same is true of firms with degree-level educated members of the senior management team.

Figure 11.10.1.10 £ Estimated Additional Sales
– By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Mean additional sales (£)	3,072k	575k	822k	2,451k	457k
Confidence interval (95% level)	± 1,662k	± 241k	± 372k	± 1,256k	± 159k
Median additional sales (£)	8k	0k	2k	5k	0k
% reporting a positive £ benefit	44%	33%	43%	44%	40%
% reporting zero £ benefit	40%	50%	41%	40%	43%
% unable/unwilling to estimate	16%	17%	16%	15%	16%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	5,832k	1,438k	1,603k	4,682k	959k

As seen below, there is evidence that firms in the production sector benefit from greater additional sales than those in the service sector. The mean benefit is also high for firms in 'other' sectors (i.e. primary/construction) but the low base and large confidence interval means that results for this group should be treated with caution.

Figure 11.10.1.11 £ Estimated Additional Sales – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Mean additional sales (£)	3,310k	1,136k	2,586k
Confidence interval (95% level)	± 2,294k	± 518k	± 3,238k
Median additional sales (£)	4k	0k	0k
% reporting a positive £ benefit	43%	39%	29%
% reporting zero £ benefit	41%	43%	56%
% unable/unwilling to estimate	15%	18%	15%
<i>Mean additional sales (£) among those reporting positive £ benefit</i>	6,475k	2,378k	7,617k

11.10.2 Estimated Total Additional Sales

An attempt has been made to estimate the total additional sales generated by UKTI support over the last year. Details of the calculation approach are shown below.

£ Estimated Total Additional Sales	
Stage 1	
	<ul style="list-style-type: none">• Calculation of the mean £ estimated additional sales across the last year
Stage 2	
	<ul style="list-style-type: none">• Aggregation of the number of individual firms supported in the last year (Annual A01 measure)<ul style="list-style-type: none">• Each firm is only counted once in the Annual A01, even if they have used multiple services in the last year.
Stage 3	
	<ul style="list-style-type: none">• The estimated total additional sales is calculated by multiplying the mean £ additional sales by the number of individual firms supported in the past year.

As seen below, this calculation estimates that the UKTI export support delivered in the last year will generate £62.7 billion of additional sales to UK businesses.

Figure 11.10.2.1 Estimated Total Additional Sales

	Total (exc. light support)
Mean additional sales	£1,992,000
Total number of firms supported (Annual A01)	£31,470
Estimated total additional sales	£62.7 billion

As detailed previously, the mean additional sales and profit figures (and hence the total grossed-up estimates) are heavily influenced by a small number of firms that report extremely high levels of financial benefit.

For more details of the distribution of financial benefits and the impact of the relatively small number of very significant 'big wins', please refer to sections 11.9.3 and 11.9.4 of this report.

11.11 Impact on UK or Overseas Sales

All those firms that expected to see a positive financial benefit from the UKTI support were asked whether this solely related to additional sales to overseas customers, or whether any of the expected benefit was likely to come from additional UK sales. If the latter, they were asked to estimate the proportion of the anticipated financial benefit that was expected to come from UK sales. Please note that these questions were only asked in PIMS 35.

Figure 11.11.1 Proportion of £ Benefit Coming From Additional UK Sales

	Total
<i>Base: All reporting positive £ benefit & exc. light support (PIMS 35 only)</i>	399
All (100%) from sales to UK customers	2%
60-80%	4%
40-60%	6%
20-40%	6%
Less than 20%	10%
None of it (0%) from sales to UK customers	70%
Don't know/refused	1%
<i>Mean % coming from sales to UK customers</i>	12%

As might be expected, the majority of UKTI clients that expect a financial benefit report that this will come entirely from additional overseas sales (70%). However, this does leave a significant minority of firms where the UKTI assistance will have a positive impact on domestic sales as well as overseas ones (and in 2% of cases the financial benefit is expected to be entirely down to additional UK sales).

As shown elsewhere in this report, UKTI export support can benefit firms in a range of different ways (e.g. helping them upgrade or improve their products/services, improving their marketing strategy) and the above results imply that this can make firms more competitive in their domestic market as well as in overseas markets.

The mean proportion of the benefit attributed to UK sales is 12%. If this proportion is applied to the estimates of total additional profit/sales (as reported in Sections 11.9.2 and 11.10.2) then the split would be as follows:

Figure 11.11.2 £ Estimated Total Benefit – By UK & Overseas Sales

	Total	Overseas sales	UK sales
Estimated total additional profit	£6.5b	£5.7b	£0.8b
Estimated total additional sales	£62.7b	£55.1b	£7.6b

As seen below, there is no evidence of any link between firms' overseas experience and the proportion of the financial benefit attributed to UK sales.

Figure 11.11.3 Proportion of £ Benefit Coming From Additional UK Sales
– By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: All reporting positive £ benefit & exc. light support (PIMS 35 only)</i>	96	171	132
All (100%) from sales to UK customers	2%	0%	5%
60-80%	3%	4%	4%
40-60%	9%	7%	4%
20-40%	4%	9%	4%
Less than 20%	9%	13%	8%
None of it (0%) from sales to UK customers	73%	66%	73%
Don't know/refused	0%	1%	2%
<i>Mean % coming from sales to UK customers</i>	12%	12%	13%

However, there is some indication that micro SMEs with fewer than 10 employees are more likely to report some positive impact on their UK business, with 36% indicating that at least some of the financial benefit will be down to additional UK sales.

Although a similar picture is seen for large firms with 250+ employees, the very low base size (17 interviews) means that this result should be interpreted with caution

Figure 11.11.4 Proportion of £ Benefit Coming From Additional UK Sales
– By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: All reporting positive £ benefit & exc. light support (PIMS 35 only)</i>	186	155	30	17
All (100%) from sales to UK customers	2%	3%	0%	0%
60-80%	4%	3%	3%	9%
40-60%	9%	6%	0%	2%
20-40%	8%	6%	0%	0%
Less than 20%	13%	7%	0%	26%
None of it (0%) from sales to UK customers	64%	74%	91%	60%
Don't know/refused	0%	1%	5%	3%
<i>Mean % coming from sales to UK customers</i>	14%	12%	3%	15%

Reflecting the results by employee numbers, firms with an annual turnover of less than £500,000 are also comparatively more likely to report a positive impact on their UK sales. Please note that the results for larger firms (£25m+) should be treated with caution due to the low base size.

Figure 11.11.5 Proportion of £ Benefit Coming From Additional UK Sales
– By Turnover

	Annual Turnover			
	Up to £500k	£500k-£2m	£2m-£25m	£25m+
<i>Base: Exc. light support & all reporting positive £ benefit (PIMS 35)</i>	158	85	113	24
All (100%) from sales to UK customers	2%	0%	4%	0%
60-80%	3%	3%	4%	9%
40-60%	11%	5%	3%	4%
20-40%	5%	9%	6%	0%
Less than 20%	14%	8%	6%	17%
None of it (0%) from sales to UK customers	65%	75%	75%	59%
Don't know/refused	0%	0%	2%	12%
<i>Mean % coming from sales to UK customers</i>	14%	9%	11%	14%

11.12 Impact on Employee Numbers

11.12.1 Summary

Businesses were asked whether, as a result of the UKTI support received, they had increased the number of people employed by their company or safeguarded any existing jobs (or expected to do so). Please note that the results for this analysis of impact on employee numbers have been calculated net of non-additionality, so any firms indicating that they would have achieved similar results anyway do not score against the measure.

Figure 11.12.1.1 Impact of Support on Employee Numbers

	Total exc. light support	Passport	GGG	EMRS	ERTA Sig. Assists	ER Events (exc. < ½ day)	ECR
<i>Base: Exc. light support</i>	3714	360	362	40	360	140	41
Increased employees	25%	54%	48%	60%	25%	23%	51%
Safeguarded jobs	27%	43%	48%	43%	24%	26%	54%
Neither/non-additional	59%	34%	32%	23%	63%	64%	29%
Don't know	3%	1%	2%	0%	2%	1%	0%

	HQ Events	OMIS	MVS	TAP SOLO	TAP Group	TAP Non Fund	Out'd Miss.	In'd Miss.
<i>Base: Exc. light support</i>	71	380	96	38	150	102	32	10
Increased employees	25%	25%	29%	42%	42%	29%	28%	30%
Safeguarded jobs	27%	29%	46%	50%	51%	39%	31%	20%
Neither/non-additional	63%	57%	40%	32%	33%	41%	50%	50%
Don't know	0%	2%	3%	5%	1%	5%	3%	10%

	Sector Events UK	Posts Sig. Assists	Posts Events	Web Bus Opps	Sector Events Abroad	DSO Events	DSO Sig. Assists	Webinars
<i>Base: Exc. light support</i>	297	617	201	-	104	59	60	-
Increased employees	15%	20%	22%	-	29%	17%	30%	-
Safeguarded jobs	17%	19%	23%	-	27%	25%	27%	-
Neither/non-additional	71%	67%	64%	-	53%	59%	57%	-
Don't know	3%	3%	2%	-	4%	5%	5%	-

A quarter of firms indicate that the support has led (or will lead) them to employ additional staff, and a similar proportion believe that it has enabled them to safeguard existing positions. It should be noted that in many cases firms report both of these impacts, and overall just over a third of supported firms (39%) report some positive impact on UK employment (i.e. jobs created and/or safeguarded).

Passport, GGG, EMRS and ECR are most likely to lead to the creation of new jobs. These services, along with MVS and TAP, are also most likely to result in companies safeguarding existing positions.

Firms supported through UK-based advisory services and tradeshows/missions are most likely to have created new jobs and safeguarded existing ones as a result of the UKTI assistance.

Figure 11.12.1.2 Impact of Support on Employee Numbers - By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Increased employees	34%	21%	20%	36%	19%
Safeguarded jobs	32%	21%	22%	46%	22%
Neither/non-additional	52%	64%	66%	36%	62%
Don't know	2%	3%	2%	3%	5%

Less experienced exporters are also more likely to increase their employee numbers as a result of the support.

Figure 11.12.1.3 Impact of Support on Employee Numbers – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Increased employees	33%	26%	20%
Safeguarded jobs	25%	29%	27%
Neither/non-additional	55%	57%	62%
Don't know	3%	2%	3%

Innovative firms are more likely to report a positive impact on their staff numbers following the UKTI support.

Figure 11.12.1.4 Impact of Support on Employee Numbers – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: Exc. light support</i>	3218	496	2425	1289
Increased employees	26%	20%	27%	22%
Safeguarded jobs	29%	17%	30%	22%
Neither/non-additional	57%	70%	55%	65%
Don't know	3%	2%	3%	2%

There is a strong link between firms' growth objectives and the likelihood of them employing additional staff as a result of the UKTI support, with 33% of those planning substantial growth doing so compared to just 7% of those not anticipating any growth over the next 5 years.

Figure 11.12.1.5 Impact of Support on Employee Numbers – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Increased employees	7%	20%	33%
Safeguarded jobs	21%	29%	28%
Neither/non-additional	71%	60%	54%
Don't know	3%	2%	3%

As a whole, younger firms are more likely to believe that the support will lead to the creation of new jobs. Young firms that were 'born global' are less likely to increase employee numbers than those that started exporting at some point after they were established.

Figure 11.12.1.6 Impact of Support on Employee Numbers – By Whether or Not Born Global

	Up to 5 Years Old				Over 5 Years Old
	Born global (tighter)	Born global	Other	Total	
<i>Base: Exc. light support</i>	266	392	523	916	2745
Increased employees	27%	28%	35%	32%	23%
Safeguarded jobs	26%	27%	25%	26%	28%
Neither/non-additional	56%	56%	54%	55%	60%
Don't know	1%	1%	2%	2%	3%

There is a relationship between company size and the impact of the UKTI support on employee numbers, with smaller firms more likely to take on new staff.

Figure 11.12.1.7 Impact of Support on Employee Numbers – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Increased employees	28%	24%	23%	15%
Safeguarded jobs	27%	29%	30%	19%
Neither/non-additional	57%	58%	57%	70%
Don't know	2%	2%	5%	3%

There is a similar relationship between annual turnover and employment growth, with firms with lower turnovers more inclined to increase their staff numbers as a direct result of the UKTI assistance.

Figure 11.12.1.8 Impact of Support on Employee Numbers – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: Exc. light support</i>	1175	747	1037	251	49
Increased employees	29%	26%	26%	17%	21%
Safeguarded jobs	27%	33%	30%	22%	26%
Neither/non-additional	56%	54%	56%	66%	63%
Don't know	2%	1%	3%	2%	3%

Firms accessing support in relation to established markets are significantly more likely to create new jobs and safeguard existing ones than those focussing on high growth markets.

Figure 11.12.1.9 Impact of Support on Employee Numbers – By Market to Which Support Referred

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Increased employees	25%	29%
Safeguarded jobs	27%	31%
Neither/non-additional	57%	54%
Don't know	3%	2%

As shown below, firms with a business plan that contains overseas targets are significantly more likely to feel they will create additional jobs as a result of the UKTI support. However, there is no statistically significant difference in this respect between firms with degree-level owners, partners or directors and those without.

Figure 11.12.1.10 Impact of Support on Employee Numbers – By Business Planning & Skilled Owners

	Current written business plan			Degree level owners, partners or directors	
	Yes (overseas targets)	Yes (no overseas targets)	No	Yes	No
<i>Base: Exc. light support</i>	2093	584	821	2740	529
Increased employees	30%	17%	21%	27%	24%
Safeguarded jobs	30%	19%	29%	29%	32%
Neither/non-additional	53%	69%	61%	56%	56%
Don't know	3%	3%	2%	2%	1%

Firms in the production sector are considerably more likely to have safeguarded jobs as a result of the UKTI support, and are also slightly more inclined to take on new staff.

Figure 11.12.1.11 Impact of Support on Employee Numbers – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Increased employees	27%	24%	26%
Safeguarded jobs	32%	24%	26%
Neither/non-additional	54%	62%	56%
Don't know	2%	3%	6%

11.12.2 Detailed Results

Those firms reporting a positive impact on employee numbers were asked to give details of the specific number of jobs likely to be created and safeguarded.

Figure 11.12.2.1 Number of Jobs Created/Safeguarded

	Total
<i>Base</i>	3714
Number of Jobs Created	
50+	1%
20-49	1%
10-19	2%
1-9	19%
Zero/non-additional	73%
Don't know	4%
<i>Mean</i>	2.2
Number of Jobs Safeguarded	
50+	1%
20-49	1%
10-19	3%
1-9	19%
Zero/non-additional	71%
Don't know	4%
<i>Mean</i>	3.7

In the vast majority of cases where firms expect to increase their staff numbers as a result of the support, they anticipate employing less than 10 additional staff. Across the entire sample (and including those not expecting any employment impacts), the mean number of new employees is 2.2.

A similar picture is seen when it comes to safeguarding jobs, although the mean is slightly higher at 3.7 safeguarded positions per firm.

Based on the means, it appears that events are least likely to lead to new employees, which is perhaps not surprising given the more passive (and often fairly brief) nature of this support.

Figure 11.12.2.2 Number of Jobs Created/Safeguarded - By Service Type

	UK-based advisory	Overseas network	Events	Tradeshows & Missions	DSO
<i>Base: Exc. light support</i>	1187	1077	913	418	119
Number of Jobs Created					
50+	1%	1%	1%	0%	0%
20-49	1%	1%	1%	1%	3%
10-19	2%	3%	2%	2%	5%
1-9	28%	15%	16%	30%	11%
Zero/non-additional	65%	76%	78%	62%	75%
Don't know	3%	4%	4%	5%	6%
<i>Mean</i>	2.8	2.6	1.5	2.5	2.3
Number of Jobs Safeguarded					
50+	1%	1%	1%	2%	1%
20-49	2%	1%	1%	3%	2%
10-19	2%	2%	2%	4%	6%
1-9	24%	16%	15%	35%	7%
Zero/non-additional	68%	76%	77%	51%	74%
Don't know	3%	4%	4%	5%	9%
<i>Mean</i>	4.4	2.7	2.9	6.5	7.1

The mean number of safeguarded jobs is highest for firms with more than 10 years overseas experience (and it should be noted that these firms tend to be larger than more recent exporters). However, it is still the case that only 8% of these firms anticipate that the UKTI support will safeguard 10 or more new positions.

Figure 11.12.2.3 Number of Jobs Created/Safeguarded – By Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: Exc. light support</i>	923	1333	1432
Number of Jobs Created			
50+	1%	0%	1%
20-49	2%	1%	1%
10-19	3%	2%	2%
1-9	25%	22%	14%
Zero/non-additional	65%	72%	78%
Don't know	5%	4%	4%
<i>Mean</i>	2.9	1.2	2.7
Number of Jobs Safeguarded			
50+	0%	1%	2%
20-49	1%	1%	2%
10-19	2%	2%	3%
1-9	20%	23%	17%
Zero/non-additional	73%	70%	71%
Don't know	4%	3%	5%
<i>Mean</i>	1.4	1.9	6.7

The more ambitious a firm's growth objectives, the greater the number of new jobs they attribute to the UKTI support.

Figure 11.12.2.4 Number of Jobs Created/Safeguarded – By Growth

	Growth Objectives		
	Same/smaller	Moderate growth	Substantial growth
<i>Base: Exc. light support</i>	174	1692	1669
Number of Jobs Created			
50+	0%	0%	1%
20-49	0%	1%	1%
10-19	0%	1%	3%
1-9	6%	17%	25%
Zero/non-additional	90%	78%	64%
Don't know	3%	3%	5%
<i>Mean</i>	0.3	1.3	2.8
Number of Jobs Safeguarded			
50+	2%	1%	1%
20-49	1%	1%	2%
10-19	3%	3%	2%
1-9	14%	21%	20%
Zero/non-additional	77%	69%	71%
Don't know	4%	4%	4%
<i>Mean</i>	3.4	3.9	3.8

Although large firms are less likely to report an impact on their staffing levels, when this does occur it tends to be on a larger scale than that seen for small firms (with a mean of 7.4 additional jobs for 250+ employee firms). Larger firms are also less likely to safeguard jobs as a result of UKTI support, but when this does happen it typically involves a greater number of positions.

Figure 11.12.2.5 Number of Jobs Created/Safeguarded – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: Exc. light support</i>	1603	1425	288	253
Number of Jobs Created				
50+	0%	1%	1%	2%
20-49	1%	1%	2%	2%
10-19	1%	2%	4%	2%
1-9	24%	19%	15%	7%
Zero/non-additional	70%	74%	73%	82%
Don't know	4%	4%	6%	5%
<i>Mean</i>	1.2	1.5	3.3	7.4
Number of Jobs Safeguarded				
50+	0%	1%	6%	4%
20-49	0%	3%	2%	3%
10-19	1%	4%	5%	2%
1-9	25%	18%	15%	6%
Zero/non-additional	71%	69%	66%	78%
Don't know	3%	4%	6%	7%
<i>Mean</i>	1.0	2.7	10.6	18.2

The mean number of new and safeguarded employees is higher for firms supported about high growth markets than those accessing assistance with established markets.

Figure 11.12.2.6 Number of Jobs Created/Safeguarded – By Support Market

	High Growth	Established
<i>Base: Exc. light support</i>	1569	1824
Number of Jobs Created		
50+	1%	0%
20-49	1%	1%
10-19	2%	2%
1-9	19%	23%
Zero/non-additional	72%	70%
Don't know	5%	4%
<i>Mean</i>	2.7	1.5
Number of Jobs Safeguarded		
50+	1%	1%
20-49	2%	1%
10-19	3%	3%
1-9	18%	23%
Zero/non-additional	70%	68%
Don't know	5%	4%
<i>Mean</i>	5.2	2.9

The employment impacts of UKTI support are also greatest for production sector firms. Figures are also high for firms operating in 'other' sectors (i.e. primary and construction) but the low base size should be considered when interpreting results for this latter group.

Figure 11.12.2.7 Number of Jobs Created/Safeguarded – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: Exc. light support</i>	1422	2222	70
Number of Jobs Created			
50+	1%	0%	7%
20-49	2%	1%	0%
10-19	2%	2%	3%
1-9	21%	19%	16%
Zero/non-additional	72%	74%	68%
Don't know	3%	5%	6%
<i>Mean</i>	3.1	1.4	9.5
Number of Jobs Safeguarded			
50+	2%	1%	2%
20-49	3%	0%	0%
10-19	4%	2%	0%
1-9	21%	18%	24%
Zero/non-additional	67%	74%	68%
Don't know	4%	4%	6%
<i>Mean</i>	6.1	2.2	5.3

11.12.3 Estimated Total Employment Impacts

An attempt has been made to estimate the total number of jobs created and safeguarded as a result of UKTI support over the last year. Details of the calculation approach are shown below.

Estimated Total Jobs Created & Safeguarded	
Stage 1	
<ul style="list-style-type: none"> Calculation of the mean number of jobs created and safeguarded across all firms interviewed in the last year 	
Stage 2	
<ul style="list-style-type: none"> Aggregation of the number of individual firms supported in the last year (Annual A01 measure) <ul style="list-style-type: none"> Each firm is only counted once in the Annual A01, even if they have used multiple services in the last year. 	
Stage 3	
<ul style="list-style-type: none"> The estimated total number of new and safeguarded jobs sales is calculated by multiplying the mean by the number of individual firms supported. 	

As seen below, this calculation estimates that the UKTI export support delivered in the last year will lead to the creation of around 69,000 new jobs and will safeguard a further 116,000 existing positions.

Figure 11.12.3.1 Estimated Total Employment Impacts

	Total (exc. light support)
New jobs	
Mean number of new jobs created	2.2
Median number of new jobs created	0
Total number of firms supported (Annual A01)	31,470
Estimated total new jobs	69,240
Safeguarded jobs	
Mean number of jobs safeguarded	3.7
Median number of jobs safeguarded	0
Total number of firms supported (Annual A01)	31,470
Estimated total safeguarded jobs	116,450

It should be noted that the above calculation uses the mean number of new/safeguarded jobs, but the median as also been shown for information. The large difference between the mean and the median values indicates that the distribution is significantly skewed by outliers (i.e. a minority of firms reporting very large employment impacts).

12. Willingness to Pay (OMIS)

OMIS clients were asked whether they would still have used the service had the charges been 25% or 50% higher, with the following results.

Figure 12.1 Whether Would Have Gone Ahead If Charges Were Higher (OMIS)

	OMIS
<i>Base: All OMIS users</i>	380
Whether still go ahead if 50% more	
Yes, definitely	21%
Yes, probably	27%
Probably not	25%
Definitely not	23%
Don't know	4%
Whether still go ahead if 25% more	
Definitely	39%
Probably	34%
Probably not	14%
Definitely not	10%
Don't know	4%
Summary	
Would go ahead if 50% more	48%
Would go ahead if 25% more (but not 50%)	25%
Would not go ahead if more	25%
Don't know if would go ahead	2%

Almost half of OMIS users (48%) would have been prepared to pay 50% more for the service, with a further quarter willing to pay 25% more (but not 50%). However, this does leave a quarter who claim that they would not have been prepared to pay any more for the service, suggesting that any future price increase will impact on the number of firms using OMIS.

The table below demonstrates that new/inexperienced exporters are significantly less likely to have gone ahead with the support if the price was increased by 50%. However, it is still the case that 59% of this group would still have commissioned the OMIS had the costs been 25% higher.

Figure 12.2 Whether Would Have Gone Ahead If Charges Were Higher
– By Number of Years Exporting (OMIS)

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: All OMIS users</i>	79	123	171
Would go ahead if 50% more	35%	53%	50%
Would go ahead if 25% more (but not 50%)	24%	26%	26%
Would not go ahead if more	37%	20%	23%
Don't know if would go ahead	4%	1%	1%

The table below provides clear evidence that smaller firms would be less likely to go ahead with OMIS if the costs were higher, particularly if they rose by 50%. This implies that any future increase in charges may discourage some smaller firms from taking up the support. That said, two-thirds would still have gone ahead if the costs were 25% higher.

Figure 12.3 Whether Would Have Gone Ahead If Charges Were Higher – By Employee Numbers (OMIS)

	Number of Employees		
	0-9	10-19	100+
<i>Base: All OMIS users</i>	116	164	69
Would go ahead if 50% more	37%	49%	61%
Would go ahead if 25% more (but not 50%)	29%	25%	20%
Would not go ahead if more	31%	23%	19%
Don't know if would go ahead	3%	2%	0%

The table below provides a similar analysis by whether or not firms scored against the Improved Business Performance measure and the Significant Business Benefit (A06) measure.

Firms that improved their business performance as a result of the assistance are more likely to have accepted a 50% price rise (although the 'hindsight' factor should be considered when interpreting this result). However, it is also noteworthy that a quarter (26%) of firms that did improve their performance claim that they still would *not* have gone ahead even if the cost had been just 25% higher, implying that a significant increase in charges may result in a lower OMIS take-up amongst firms that would ultimately benefit from the service (and count against UKTI's performance targets). A very similar picture is seen for those firms scoring against the Significant Business Benefit measure (A06).

Figure 12.4 Whether Would Have Gone Ahead If Charges Were Higher – By Key Impact Measures (OMIS)

	Improved Business Performance		Significant Business Benefit (A06)	
	Yes	No	Yes	No
<i>Base: All OMIS users</i>	208	172	278	102
Would go ahead if 50% more	55%	38%	51%	39%
Would go ahead if 25% more (but not 50%)	26%	24%	26%	25%
Would not go ahead if more	17%	35%	22%	34%
Don't know if would go ahead	1%	2%	2%	2%

The table below provides details of the proportions of firms scoring against the key survey measures, analysed by their likelihood of going ahead with the support had the charges been higher.

Figure 12.5 Key Measures – By Whether Would Have Gone Ahead If Charges Were Higher (OMIS)

	Likelihood of going ahead if charges increased		
	Would go ahead if 50% more	Would go ahead if 25% more (but not 50%)	Would not go ahead if more
<i>Base: All OMIS users</i>	181	96	96
A09 – Quality Rating	80%	74%	67%
B10 – Overall Satisfaction	78%	64%	55%
Improved Business Performance	64%	57%	36%
A83 – Changed Behaviour	65%	64%	51%
AR&D – Increased R&D	20%	14%	10%
A92 – Barriers Overcome	70%	67%	55%
A06 – Sig. Business Benefit	78%	74%	64%
A49 - £ Estimated Additional Profit	£160,000	£212,000	£154,000

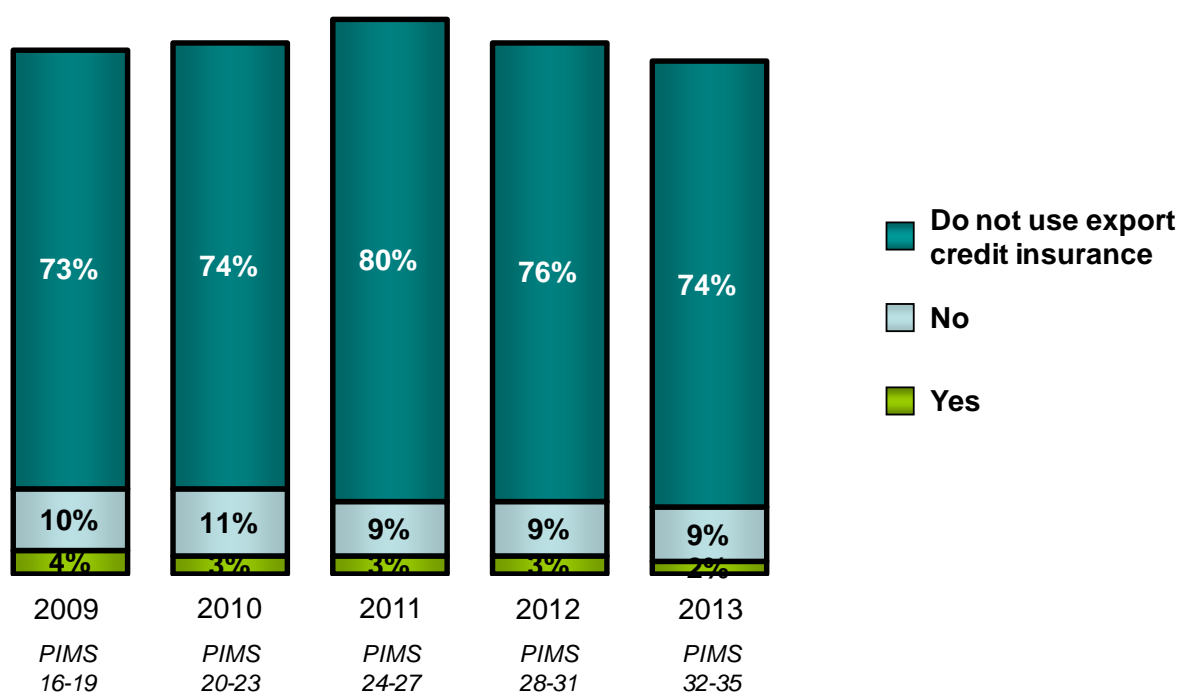
As might be expected, those firms that subsequently indicate that they would still have gone ahead with the support had the charges been higher tend to have a better perception of the quality of the OMIS service and demonstrate higher satisfaction levels. They are also more likely to score against the various impact measures.

13. Impact of Economic Climate & Other External Factors

13.1 Difficulties Accessing Export Credit Insurance

Firms were asked whether they used export credit insurance and, if so, whether they had experienced any difficulties in accessing this over the previous 6 months. Please note that this question was only asked to firms that were exporting, and non exporters have been excluded from the analysis. The chart below provides an analysis of responses to this question over time⁴⁹.

Figure 13.1.1 Difficulties Accessing Export Credit Insurance in Last 6 Months – Over Time



Base: All except not currently exporting (Base, Don't know/Refused)
 2009 (3636, 14%), 2010 (3758, 13%), 2011 (3518, 9%), 2012 (3624, 12%), 2013 (3498, 15%)

While only 2% of firms reported difficulties accessing export credit insurance in 2013, this does equate to almost a fifth of the firms that use it.

There appears to have been a marginal decline over time in the proportion of firms using export credit insurance and the proportion experiencing difficulties in accessing it.

⁴⁹ Please note that throughout this section of the report, the years shown in the charts refer to the time when the support was delivered but firms were interviewed c.6 months after this point.

The following analysis demonstrates that established exporters are more likely to use export credit insurance. Once the higher use among experienced firms is taken into account, there is little difference in the likelihood of having difficulties accessing it (i.e. as a proportion of all those that use it).

Figure 13.1.2 Difficulties Accessing Export Credit Insurance in Last 6 Months – By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: All exporters (PIMS 32-35)</i>	593	1379	1499
Yes	1%	1%	4%
No	3%	7%	13%
Don't know	0%	1%	2%
Do not use export credit insurance	90%	82%	62%
Don't know if use export credit insurance	6%	9%	19%

It is also the case that micro SMEs are much less likely to be using export credit insurance. Proportionally, the likelihood of experiencing difficulties in accessing this insurance is similar irrespective of company size.

Figure 13.1.3 Difficulties Accessing Export Credit Insurance in Last 6 Months – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: All exporters (PIMS 32-35)</i>	1452	1415	287	253
Yes	1%	3%	6%	4%
No	4%	12%	17%	11%
Don't know	0%	1%	3%	3%
Do not use export credit insurance	91%	69%	52%	51%
Don't know if use export credit insurance	3%	14%	22%	30%

Overall, 20% of production sector firms use export credit insurance and around a fifth of this group have experienced problems accessing it. Use of export credit insurance is much less prevalent in the services sector.

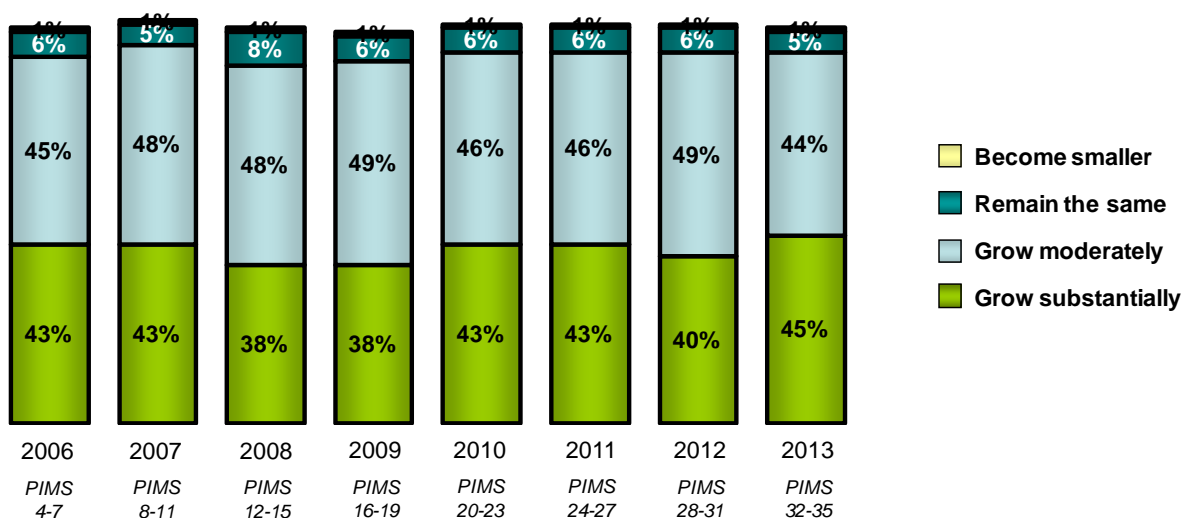
Figure 13.1.4 Difficulties Accessing Export Credit Insurance in Last 6 Months – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: All exporters (PIMS 32-35)</i>	1371	2069	58
Yes	4%	1%	2%
No	14%	6%	20%
Don't know	2%	1%	1%
Do not use export credit insurance	65%	79%	68%
Don't know if use export credit insurance	15%	13%	9%

13.2 Links with Growth Objectives & R&D Activity

The chart below provides analysis of how firms' growth objectives have changed over time. This indicates that the economic downturn of 2008/9 had a detrimental effect on firms' growth aspirations. However, this has picked up over the last few years and the proportion expecting substantial growth is now higher than the levels seen 4-5 years ago, suggesting that firms feel the worst of the downturn is behind them.

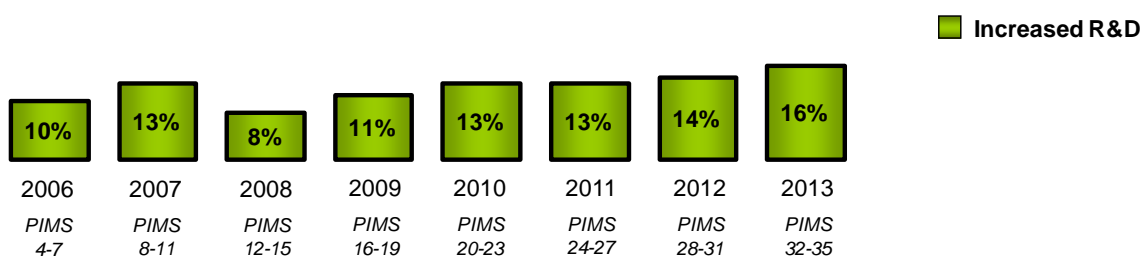
Figure 13.2.1 Growth Objectives for Next 5 Years - Over Time



Base: All respondents (Base, Don't know, Not yet trading)
 2006 (2801, 5%, 0%), 2007 (3406, 2%, 0%), 2008 (4035, 3%, 2%), 2009 (4158, 3%, 2%), 2010 (4190, 3%, 2%), 2011 (4419, 2%, 2%), 2012 (4309, 2%, 2%), 2013 (4248, 4%, 2%)

The following chart provides details of how the proportion of firms increasing their R&D activity as a result of the UKTI support has changed over time. There was a dip in the proportion of firms increasing their R&D activity during the 2008 and 2009, suggesting that firms cut back on R&D when economic conditions mean that their growth prospects are limited.

Figure 13.2.2 Measure AR&D Increased R&D – Over Time

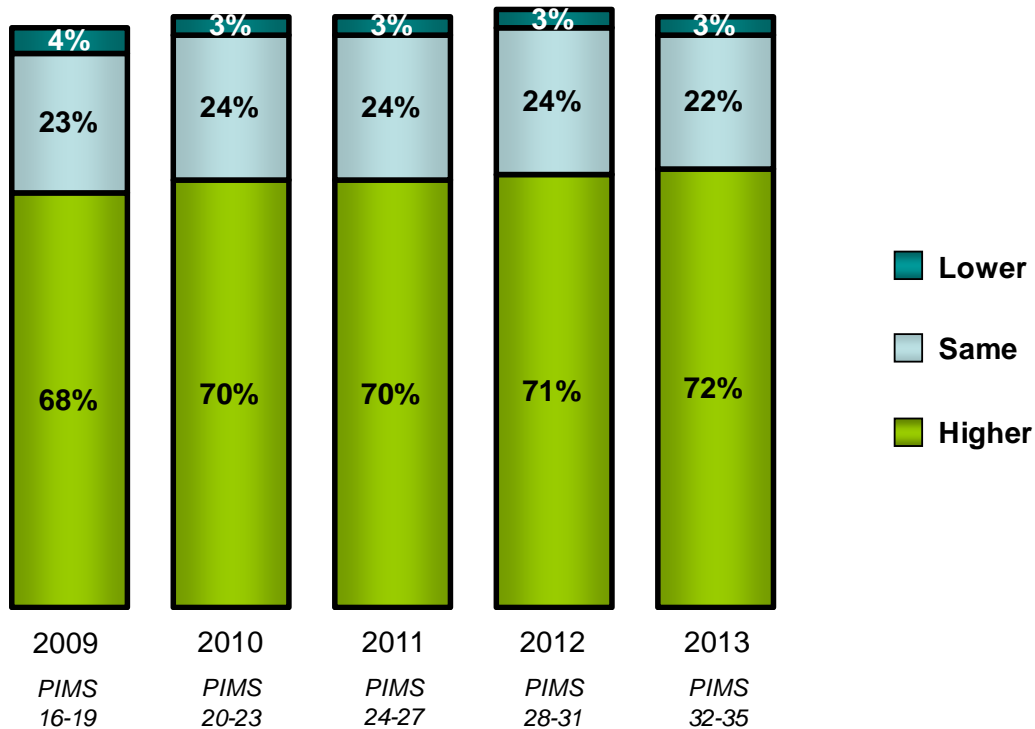


Base: All exc. light support (Base)
 2006 (2761), 2007 (3284), 2008 (3944), 2009 (4039), 2010 (4000), 2011 (3817), 2012 (4025), 2013 (3714)

13.3 Links with Anticipated Export Turnover

The chart below provides details of whether firms expect the proportion of their turnover accounted for by export sales to increase, decrease or remain the same over the next 3 years, and how this has changed over time.

Figure 13.3.1 Anticipated Change in Proportion of Turnover Accounted for by Overseas Sales in Next 3 Years – Over Time



Base: All respondents (Base, Don't know/Refused)
2009 (4158, 5%), 2010 (4190, 4%), 2011 (4419, 3%), 2012 (4309, 3%), 2013 (4248, 2%)

Reflecting the recent uplift in firms' overall growth objectives, there has been a gradual (but statistically significant) increase since 2009 in the proportion of firms expecting an increase in their export sales.

13.4 Impact of London 2012 Olympics

Firms were also asked whether the London 2012 Olympics had any positive impact on their overseas business. If so, they were asked whether this was in terms of additional overseas sales, more interest in doing business with UK firms or more positive perceptions of the UK generally.

Figure 13.4.1 Impact of London 2012 on Overseas Business – All UKTI Clients

	Total
<i>Base: All except webinar participants</i>	4168
Yes, positive impact	17%
- <i>Additional sales from overseas markets</i>	8%
- <i>More interest in doing business with UK firms</i>	12%
- <i>More positive perception of the UK</i>	16%
No	79%
Negative impact	0%
Don't know/refused	4%

Overall, 17% of UKTI clients feel that the export side of their business has benefited in some way from the 2012 Olympics. In most cases this Olympic impact relates to a generally more positive perception of the UK or greater interest from overseas customers in doing business with UK firms. However, 8% of all firms report a concrete financial impact of the Olympics through additional sales from overseas markets.

As seen below, firms that have been doing business overseas for at least 2 years are more likely to report a positive impact of the Olympics on their overseas business.

Figure 13.4.2 Impact of London 2012 on Overseas Business
– By Number of Years Exporting

	When Started Exporting		
	Less than 2 years	2-10 years	More than 10 years
<i>Base: All except webinar participants</i>	1057	1485	1598
Yes, positive impact	13%	17%	19%
- <i>Additional sales from overseas markets</i>	6%	8%	10%
- <i>More interest in doing business with UK firms</i>	10%	11%	13%
- <i>More positive perception of the UK</i>	12%	15%	18%
No	82%	81%	76%
Negative impact	0%	0%	0%
Don't know/refused	4%	2%	4%

There is no evidence that innovative firms were better placed to benefit from the London 2012 Olympics.

Figure 13.4.3 Impact of London 2012 on Overseas Business – By Innovation

	Innovative		Innovative Alternative (Tighter Definition)	
	Yes	No	Yes	No
<i>Base: All except webinar participants</i>	3587	581	2687	1481
Yes, positive impact	17%	15%	17%	16%
- <i>Additional sales from overseas markets</i>	8%	8%	8%	8%
- <i>More interest in doing business with UK firms</i>	12%	11%	12%	12%
- <i>More positive perception of the UK</i>	16%	14%	16%	15%
No	79%	79%	79%	79%
Negative impact	0%	0%	0%	1%
Don't know/refused	4%	5%	3%	4%

However, larger firms are more likely to have benefited from London hosting the 2012 Olympics.

Figure 13.4.4 Impact of London 2012 on Overseas Business – By Employee Numbers

	Number of Employees			
	0-9	10-99	100-249	250+
<i>Base: All except webinar participants</i>	1814	1590	326	276
Yes, positive impact	14%	18%	21%	28%
- <i>Additional sales from overseas markets</i>	7%	9%	8%	15%
- <i>More interest in doing business with UK firms</i>	10%	12%	14%	18%
- <i>More positive perception of the UK</i>	13%	17%	19%	23%
No	83%	79%	73%	62%
Negative impact	1%	0%	0%	0%
Don't know/refused	3%	3%	6%	10%

As shown below, firms with a higher annual turnover are also more likely to have benefited from the Olympics.

Figure 13.4.5 Impact of London 2012 on Overseas Business – By Turnover

	Annual Turnover				
	Up to £500k	£500k-£2m	£2m-£25m	£25m-£500m	Over £500m
<i>Base: All except webinar participants</i>	1345	829	1157	273	52
Yes, positive impact	14%	14%	19%	24%	38%
- <i>Additional sales from overseas markets</i>	7%	7%	9%	14%	21%
- <i>More interest in doing business with UK firms</i>	9%	10%	13%	15%	21%
- <i>More positive perception of the UK</i>	13%	13%	18%	21%	27%
No	82%	84%	78%	69%	53%
Negative impact	1%	0%	0%	0%	0%
Don't know/refused	3%	2%	3%	7%	8%

Firms operating in the 'other' sectors (which primarily include the construction industry) are most likely to have benefited from the Olympics. Firms operating in the services sector are also slightly more likely than those in the production sector to have report a positive impact.

Figure 13.4.6 Impact of London 2012 on Overseas Business – By Sector

	Market Sector		
	Production	Services	Other
<i>Base: All except webinar participants</i>	1557	2532	78
Yes, positive impact	15%	18%	27%
- <i>Additional sales from overseas markets</i>	6%	9%	13%
- <i>More interest in doing business with UK firms</i>	10%	13%	19%
- <i>More positive perception of the UK</i>	13%	17%	24%
No	81%	78%	70%
Negative impact	1%	0%	0%
Don't know/refused	4%	3%	3%

Annex A – Regional Analysis

A.1 Passport

Below are the key survey results for the Passport scheme, analysed by English region.

Figure A.1.1 Measure A01 – Number of Firms Supported (Passport)

	East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
PIMS 32 (Apr-Jun 12) ⁵⁰	16	35	40	23	65	41	33	48	40
PIMS 33 (Jul-Sep 12)	26	28	28	24	32	38	26	41	22
PIMS 34 (Oct-Dec 12)	23	32	37	23	24	35	30	29	30
PIMS 35 (Jan-Mar 13)	35	39	37	32	12	50	33	40	37
- % of records complete (PIMS 35)	94%	100%	97%	97%	100%	98%	97%	93%	97%
- % with contact details incorrect (PIMS 35)	15%	16%	33%	16%	25%	0%	25%	13%	18%

Figure A.1.2 Profile (Passport)

		East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
Base		38	41	42	38	33	43	39	43	43
Growth objectives	Substantial	53%	59%	50%	47%	39%	56%	62%	47%	49%
	Substantial or moderate	100%	90%	95%	92%	94%	98%	97%	95%	98%
Innovative firms	Yes	87%	85%	93%	76%	79%	93%	97%	86%	79%
	Yes (alt)	61%	66%	74%	55%	70%	72%	72%	67%	49%
Age	0-5 years	29%	49%	40%	53%	33%	40%	36%	44%	30%
	6-10 years	21%	22%	17%	21%	9%	14%	23%	21%	16%
	>10 years	50%	29%	43%	26%	58%	47%	41%	35%	53%
Size	<10 emps	50%	63%	57%	66%	64%	60%	54%	65%	51%
	10-249 emps	47%	32%	43%	32%	36%	37%	41%	35%	44%
	250+ emps	0%	0%	0%	0%	0%	0%	3%	0%	2%
Export experience	<2 years	42%	49%	33%	58%	48%	49%	49%	51%	42%
	2-10 years	34%	41%	55%	37%	33%	37%	41%	44%	35%
	>10 years	24%	10%	12%	5%	15%	14%	8%	5%	23%
Support focus	Exporting	97%	100%	98%	95%	97%	98%	97%	98%	100%
	Sourcing	5%	7%	14%	13%	9%	2%	8%	9%	7%
	JV/franchising	47%	54%	52%	45%	39%	37%	51%	33%	51%
	Investing/overseas site	21%	34%	38%	29%	27%	42%	36%	30%	30%

⁵⁰ Please note that these dates show when firms signed up to Passport.

Figure A.1.3 Key Measures (Passport)

	East Mids	East Eng	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>	38	41	42	38	33	43	39	43	43
A09 – Quality Rating	93%	93%	89%	90%	89%	89%	95%	93%	93%
B10 – Overall Satisfaction	79%	85%	83%	79%	79%	84%	85%	72%	88%
Imp. Business Performance	74%	76%	76%	71%	76%	79%	77%	74%	77%
A81 – Increased Skills	84%	73%	69%	79%	73%	70%	79%	70%	84%
A83 – Changed Behaviour	89%	83%	81%	84%	76%	79%	90%	79%	86%
A04 – Increased Innovation	55%	51%	48%	45%	61%	63%	67%	51%	58%
AR&D – Increased R&D	21%	22%	40%	34%	27%	44%	31%	33%	35%
A92 – Barriers Overcome	76%	78%	67%	76%	70%	74%	77%	77%	91%
A06 – Sig. Business Benefit	89%	88%	83%	92%	76%	84%	92%	84%	93%

Figure A.1.4 Individual Quality Ratings (Passport)

<i>Proportion scoring '4' or '5' out of 5 for...</i>	East Mids	East Eng	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>	38	41	42	38	33	43	39	43	43
Impartiality of ITA	89%	93%	88%	89%	91%	88%	95%	93%	98%
Competence & knowledge of ITA	92%	93%	83%	92%	88%	95%	95%	93%	93%
Ability of ITA to communicate clearly & effectively	97%	93%	98%	87%	91%	91%	95%	95%	91%
Quality & relevance of information & advice	87%	88%	83%	92%	82%	84%	92%	91%	88%
Attitude & professionalism of ITA	97%	98%	93%	89%	94%	91%	97%	95%	95%

A.2 GGG

Below are the key survey results for the GGG programme, analysed by English region.

Figure A.2.1 Measure A01 – Number of Firms Supported (GGG)

	East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
PIMS 32 (Jul-Sep 12) ⁵¹	25	30	56	20	44	59	28	36	32
PIMS 33 (Oct-Dec 12)	26	50	56	34	40	46	38	32	41
PIMS 34 (Jan-Mar 13)	41	72	108	12	42	107	66	66	46
PIMS 35 (Apr-Jun 13)	31	36	52	28	41	35	50	76	57
- % of records complete (PIMS 35)	100%	97%	98%	100%	98%	100%	100%	99%	100%
- % with contact details incorrect (PIMS 35)	13%	8%	17%	13%	5%	4%	17%	13%	4%

Figure A.2.2 Profile (GGG)

		East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>		42	43	40	30	42	41	43	40	41
Growth objectives	Substantial	43%	51%	55%	53%	33%	41%	44%	28%	34%
	Substantial or moderate	98%	95%	95%	97%	95%	100%	93%	98%	93%
Innovative firms	Yes	90%	93%	95%	97%	93%	93%	86%	93%	90%
	Yes (alt)	67%	74%	68%	80%	76%	59%	67%	73%	76%
Age	0-5 years	19%	12%	30%	40%	10%	17%	9%	13%	22%
	6-10 years	17%	9%	15%	10%	26%	15%	19%	8%	12%
	>10 years	64%	79%	55%	50%	64%	68%	72%	80%	66%
Size	<10 emps	48%	30%	40%	40%	31%	37%	42%	35%	46%
	10-249 emps	50%	70%	55%	57%	64%	59%	56%	58%	46%
	250+ emps	2%	0%	3%	3%	2%	5%	2%	8%	5%
Export experience	<2 years	12%	16%	13%	20%	12%	7%	9%	8%	15%
	2-10 years	43%	21%	55%	43%	55%	37%	44%	30%	56%
	>10 years	45%	63%	33%	37%	33%	56%	47%	63%	29%
Support focus	Exporting	98%	93%	100%	100%	95%	98%	93%	95%	100%
	Sourcing	12%	7%	13%	3%	10%	15%	2%	5%	2%
	JV/franchising	24%	40%	38%	37%	36%	27%	26%	23%	27%
	Investing/overseas site	17%	16%	43%	33%	26%	24%	14%	25%	15%

⁵¹ Please note that these dates show when firms signed up to GGG.

Figure A.2.3 Key Measures (GGG)

	East Mids	East Eng	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>	42	43	40	30	42	41	43	40	41
A09 – Quality Rating	88%	91%	86%	89%	92%	86%	92%	89%	93%
B10 – Overall Satisfaction	81%	81%	80%	73%	90%	78%	88%	83%	95%
Imp. Business Performance	60%	74%	65%	77%	83%	71%	84%	80%	78%
A81 – Increased Skills	62%	65%	68%	80%	69%	71%	81%	78%	78%
A83 – Changed Behaviour	67%	70%	68%	80%	76%	80%	86%	83%	78%
A04 – Increased Innovation	43%	30%	50%	47%	50%	56%	53%	38%	56%
AR&D – Increased R&D	24%	23%	23%	30%	36%	39%	40%	28%	29%
A92 – Barriers Overcome	71%	60%	70%	73%	69%	76%	79%	73%	76%
A06 – Sig. Business Benefit	81%	79%	83%	87%	83%	88%	88%	90%	83%

Figure A.2.4 Individual Quality Ratings (GGG)

<i>Proportion scoring '4' or '5' out of 5 for...</i>	East Mids	East Eng	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>	42	43	40	30	42	41	43	40	41
Impartiality of ITA	86%	95%	93%	93%	93%	88%	98%	95%	98%
Competence & knowledge of ITA	86%	91%	88%	97%	93%	95%	95%	90%	90%
Ability of ITA to communicate clearly & effectively	90%	95%	93%	90%	95%	88%	98%	95%	100%
Quality & relevance of information & advice	86%	79%	70%	83%	93%	83%	93%	80%	95%
Attitude & professionalism of ITA	93%	100%	93%	93%	98%	93%	98%	98%	100%
Relevance of referrals to other UKTI support	83%	75%	65%	71%	74%	68%	67%	62%	56%
Relevance of referrals to non-UKTI support	77%	69%	84%	88%	64%	56%	29%	64%	69%

A.3 ERTA Significant Assists

Below are the key survey results for firms receiving significant assistance from the English Regions Trade Advisors, analysed by region.

Figure A.3.1 Measure A01 – Number of Firms Supported (ERTA Sig. Assists)

	East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
PIMS 32 (Jan-Mar 13)	209	294	334	69	288	342	211	193	210
PIMS 33 (Apr-Jun 13)	114	239	194	225	276	212	57	216	170
PIMS 34 (Jul-Sep 13)	125	204	280	152	244	340	214	302	197
PIMS 35 (Oct-Dec 13)	127	257	357	171	255	403	157	195	257
- % of records complete (PIMS 35)	98%	99%	94%	99%	99%	98%	99%	99%	100%
- % with contact details incorrect (PIMS 35)	12%	4%	17%	12%	21%	20%	32%	14%	4%

Figure A.3.2 Profile (ERTA Sig. Assists)

		East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>		42	44	38	40	34	41	38	43	40
Growth objectives	Substantial	40%	34%	61%	45%	32%	54%	53%	40%	38%
	Substantial or moderate	90%	93%	95%	88%	91%	90%	97%	86%	88%
Innovative firms	Yes	83%	75%	76%	93%	97%	88%	76%	93%	78%
	Yes (alt)	60%	48%	63%	58%	62%	51%	58%	74%	65%
Age	0-5 years	14%	36%	58%	43%	26%	32%	50%	26%	40%
	6-10 years	19%	16%	8%	25%	12%	15%	8%	19%	13%
	>10 years	67%	48%	34%	33%	62%	54%	42%	56%	48%
Size	<10 emps	48%	59%	66%	70%	59%	54%	61%	47%	55%
	10-249 emps	43%	32%	26%	23%	38%	37%	37%	47%	38%
	250+ emps	10%	7%	3%	8%	3%	7%	0%	2%	5%
Export experience	<2 years	40%	34%	63%	53%	32%	29%	39%	28%	43%
	2-10 years	24%	34%	21%	28%	47%	39%	34%	30%	23%
	>10 years	33%	32%	16%	20%	21%	32%	26%	42%	35%
Support focus	Exporting	93%	98%	97%	88%	94%	95%	87%	95%	95%
	Sourcing	17%	7%	8%	10%	12%	2%	11%	7%	5%
	JV/franchising	24%	18%	39%	40%	24%	34%	34%	37%	25%
	Investing/overseas site	19%	14%	47%	28%	21%	24%	5%	19%	23%

Figure A.3.3 Key Measures (ERTA Sig. Assists)

	East Mids	East Eng	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>	42	44	38	40	34	41	38	43	40
A09 – Quality Rating	89%	91%	87%	79%	82%	85%	95%	90%	93%
B10 – Overall Satisfaction	76%	77%	82%	75%	76%	76%	87%	74%	85%
Imp. Business Performance	50%	55%	53%	35%	41%	49%	55%	53%	63%
A81 – Increased Skills	52%	43%	58%	48%	41%	39%	66%	53%	70%
A83 – Changed Behaviour	62%	59%	66%	48%	50%	46%	71%	58%	78%
A04 – Increased Innovation	36%	30%	39%	23%	24%	27%	45%	33%	48%
AR&D – Increased R&D	10%	14%	18%	5%	3%	5%	13%	14%	20%
A92 – Barriers Overcome	60%	59%	71%	58%	59%	46%	71%	60%	75%
A06 – Sig. Business Benefit	69%	70%	82%	60%	65%	54%	79%	63%	83%

Figure A.3.4 Individual Quality Ratings (ERTA Sig. Assists)

<i>Proportion scoring '4' or '5' out of 5 for...</i>	East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>	42	44	38	40	34	41	38	43	40
Impartiality of ITA	98%	95%	87%	88%	88%	88%	100%	91%	93%
Competence & knowledge of ITA	90%	93%	89%	75%	82%	83%	97%	86%	95%
Ability of ITA to communicate clearly & effectively	90%	95%	92%	78%	88%	85%	95%	95%	98%
Quality & relevance of information & advice	80%	77%	76%	66%	71%	74%	89%	84%	85%
Attitude & professionalism of ITA	90%	95%	92%	93%	88%	98%	95%	95%	95%

A.4 OMIS

Below are the key survey results for the OMIS scheme, analysed by English region and by the overseas region to which the support referred.

Figure A.4.1 Measure A01 Number of Firms Supported (OMIS) – By English Region

	East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
PIMS 32 (Jan-Mar 13)	96	121	328	59	92	196	104	113	126
PIMS 33 (Apr-Jun 13)	66	88	339	63	91	156	93	109	84
PIMS 34 (Jul-Sep 13)	52	78	248	49	79	134	81	89	63
PIMS 35 (Oct-Dec 13)	73	129	329	52	115	190	110	134	81
- % of records complete (PIMS 35)	100%	100%	98%	100%	100%	96%	99%	99%	99%
- % with contact details incorrect (PIMS 35)	18%	12%	30%	9%	15%	0%	14%	7%	0%

Figure A.4.2 Profile (OMIS) – By English Region

		East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>		30	32	74	28	31	60	29	42	31
Growth objectives	Substantial	43%	31%	42%	43%	55%	63%	52%	48%	48%
	Substantial or moderate	90%	84%	80%	89%	94%	83%	86%	88%	87%
Innovative firms	Yes	90%	88%	73%	79%	90%	78%	86%	86%	87%
	Yes (alt)	73%	69%	47%	61%	71%	65%	59%	57%	55%
Age	0-5 years	3%	9%	23%	21%	16%	27%	24%	17%	19%
	6-10 years	20%	13%	14%	32%	6%	15%	17%	19%	13%
	>10 years	77%	78%	64%	46%	77%	58%	59%	64%	68%
Size	<10 emps	30%	31%	24%	54%	29%	35%	38%	31%	13%
	10-249 emps	57%	63%	51%	46%	68%	42%	41%	55%	74%
	250+ emps	13%	3%	9%	0%	3%	8%	10%	12%	3%
Export experience	<2 years	20%	9%	18%	25%	19%	20%	31%	24%	26%
	2-10 years	40%	28%	27%	43%	35%	40%	31%	29%	29%
	>10 years	40%	59%	50%	32%	45%	38%	38%	48%	45%
Support focus	Exporting	87%	88%	65%	86%	90%	88%	97%	93%	84%
	Sourcing	3%	6%	7%	7%	0%	5%	0%	5%	6%
	JV/franchising	30%	38%	23%	29%	26%	28%	28%	40%	35%
	Investing/overseas site	13%	13%	20%	21%	19%	13%	10%	21%	16%

Figure A.4.3 Profile (OMIS) – By Overseas Region

		Europe	North America	Latin America	Asia Pacific	M.East & Africa
<i>Base</i>		123	47	43	118	49
Growth objectives	Substantial	45%	62%	40%	48%	51%
	Substantial or moderate	89%	89%	79%	83%	84%
Innovative firms	Yes	81%	85%	79%	81%	86%
	Yes (alt)	59%	66%	56%	61%	61%
Age	0-5 years	16%	30%	9%	17%	31%
	6-10 years	20%	19%	12%	13%	14%
	>10 years	64%	51%	79%	70%	55%
Size	<10 emps	29%	45%	14%	30%	37%
	10-249 emps	54%	47%	67%	55%	43%
	250+ emps	11%	2%	7%	5%	14%
Export experience	<2 years	18%	26%	12%	26%	18%
	2-10 years	36%	43%	21%	28%	35%
	>10 years	46%	28%	65%	44%	45%
Support focus	Exporting	85%	91%	86%	76%	86%
	Sourcing	7%	4%	0%	4%	6%
	JV/franchising	24%	15%	37%	34%	41%
	Investing/overseas site	13%	23%	5%	17%	29%

Figure A.4.4 Key Measures (OMIS) – By English Region

	East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>	30	32	74	28	31	60	29	42	31
A09 – Quality Rating	81%	75%	73%	76%	64%	76%	76%	77%	78%
B10 – Overall Satisfaction	80%	69%	72%	64%	48%	68%	59%	74%	81%
B09 – Clear Information	83%	84%	81%	79%	85%	81%	85%	80%	77%
Imp. Business Performance	63%	66%	47%	64%	39%	50%	69%	62%	61%
A81 – Increased Skills	67%	47%	39%	61%	32%	57%	59%	69%	52%
A83 – Changed Behaviour	70%	69%	57%	61%	39%	57%	59%	76%	65%
A04 – Increased Innovation	30%	25%	30%	36%	13%	37%	31%	45%	26%
AR&D – Increased R&D	23%	13%	7%	25%	10%	22%	24%	17%	19%
A92 – Barriers Overcome	63%	66%	59%	71%	55%	72%	62%	76%	65%
A06 – Sig. Business Benefit	87%	72%	64%	75%	61%	75%	72%	86%	77%

Figure A.4.5 Key Measures (OMIS) – By Overseas Region

	Europe	North America	Latin America	Asia Pacific	M.East & Africa
<i>Base</i>	123	47	43	118	49
A09 – Quality Rating	76%	70%	80%	74%	76%
B10 – Overall Satisfaction	65%	74%	74%	66%	73%
B09 – Clear Information	79%	78%	87%	81%	88%
Imp. Business Performance	52%	57%	58%	58%	47%
A81 – Increased Skills	49%	57%	47%	56%	51%
A83 – Changed Behaviour	56%	64%	51%	69%	61%
A04 – Increased Innovation	23%	32%	37%	36%	37%
AR&D – Increased R&D	7%	26%	16%	20%	18%
A92 – Barriers Overcome	59%	68%	70%	70%	63%
A06 – Sig. Business Benefit	69%	70%	74%	80%	69%

Figure A.4.6 Individual Quality Ratings (OMIS) – By English Region

<i>Proportion scoring '4' or '5' out of 5 for...</i>	East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>	30	32	74	28	31	60	29	42	31
Quality & relevance of information & advice	83%	71%	69%	71%	52%	70%	72%	78%	70%
Clarity & ease of understanding of information & advice	90%	68%	77%	86%	81%	82%	90%	83%	80%
Quality & relevance of contacts	57%	68%	69%	68%	47%	53%	62%	56%	83%
Communications with staff at main access point	87%	78%	66%	93%	81%	82%	83%	86%	90%
Communications with embassy staff	70%	80%	79%	73%	68%	88%	67%	84%	68%
Objectivity of embassy staff	92%	85%	81%	70%	62%	89%	75%	84%	81%
Attitude & professionalism of embassy staff	100%	92%	81%	81%	65%	91%	79%	95%	85%
Organisation of practical arrangements for event	100%	100%	88%	100%	100%	93%	100%	94%	100%

Figure A.4.7 Individual Quality Ratings (OMIS) – By Overseas Region

<i>Proportion scoring '4' or '5' out of 5 for...</i>	Europe	North America	Latin America	Asia Pacific	M.East & Africa
<i>Base</i>	123	47	43	118	49
Quality & relevance of information & advice	72%	66%	69%	71%	71%
Clarity & ease of understanding of information & advice	82%	73%	90%	81%	86%
Quality & relevance of contacts	62%	53%	74%	63%	59%
Communications with staff at main access point	78%	85%	77%	77%	94%
Communications with embassy staff	80%	60%	77%	75%	74%
Objectivity of embassy staff	83%	81%	79%	79%	78%
Attitude & professionalism of embassy staff	89%	81%	92%	84%	80%
Organisation of practical arrangements for event	100%	100%	100%	80%	92%

Figure A.4.8 Individual Clear Information Ratings (OMIS) – By English Region

<i>Proportion scoring '4' or '5' out of 5 for...</i>	East Mids	East	London	North East	North West	South East	South West	West Mids	Yorks
<i>Base</i>	30	32	74	28	31	60	29	42	31
Format & content of report	76%	83%	72%	69%	70%	77%	80%	78%	86%
Time taken to receive report	80%	87%	72%	81%	70%	74%	65%	70%	81%
Cost of using the service	87%	91%	89%	89%	100%	87%	93%	93%	81%

Figure A.4.9 Individual Clear Information Ratings (OMIS) – By Overseas Region

<i>Proportion scoring '4' or '5' out of 5 for...</i>	Europe	North America	Latin America	Asia Pacific	M.East & Africa
<i>Base</i>	123	47	43	118	49
Format & content of report	74%	74%	80%	77%	82%
Time taken to receive report	73%	69%	80%	78%	82%
Cost of using the service	87%	87%	95%	87%	96%

A.5 Posts Significant Assists

Below are the key survey results for Posts Significant Assists, analysed by the overseas region to which the support referred.

Figure A.5.1 Profile (Posts Sig. Assists) – By Overseas Region

		Europe	North America	Latin America	Asia Pacific	M.East & Africa
<i>Base</i>		237	74	72	144	90
Growth objectives	Substantial	43%	59%	51%	56%	37%
	Substantial or moderate	87%	89%	89%	93%	87%
Innovative firms	Yes	84%	80%	92%	91%	81%
	Yes (alt)	63%	70%	69%	70%	61%
Age	0-5 years	22%	35%	26%	24%	24%
	6-10 years	14%	23%	18%	20%	19%
	>10 years	63%	42%	56%	56%	56%
Size	<10 emps	39%	59%	39%	40%	32%
	10-249 emps	49%	28%	46%	46%	51%
	250+ emps	7%	3%	8%	10%	8%
Export experience	<2 years	26%	35%	22%	23%	16%
	2-10 years	28%	42%	29%	40%	40%
	>10 years	45%	23%	49%	37%	43%
Support focus	Exporting	89%	85%	85%	83%	84%
	Sourcing	5%	3%	10%	7%	7%
	JV/franchising	20%	30%	40%	34%	32%
	Investing/overseas site	12%	34%	25%	26%	28%

Figure A.5.2 Key Measures (Posts Sig. Assists) – By Overseas Region

	Europe	North America	Latin America	Asia Pacific	M.East & Africa
<i>Base</i>	237	74	72	144	90
A09 – Quality Rating	81%	75%	81%	77%	69%
B10 – Overall Satisfaction	77%	72%	79%	73%	68%
Imp. Business Performance	41%	38%	50%	43%	41%
A81 – Increased Skills	38%	38%	54%	42%	33%
A83 – Changed Behaviour	46%	49%	56%	53%	48%
A04 – Increased Innovation	22%	24%	24%	28%	28%
AR&D – Increased R&D	8%	14%	10%	15%	9%
A92 – Barriers Overcome	56%	51%	64%	51%	52%
A06 – Sig. Business Benefit	60%	58%	71%	62%	58%

Figure A.5.3 Individual Quality Ratings (Posts Sig. Assists) – By Overseas Region

<i>Proportion scoring '4' or '5' out of 5 for...</i>	Europe	North America	Latin America	Asia Pacific	M.East & Africa
<i>Base</i>	237	74	72	144	90
Competence & knowledge of embassy staff	85%	84%	89%	79%	74%
Ability of embassy staff to communicate clearly & effectively	91%	91%	92%	84%	83%
Quality & relevance of information & advice	72%	60%	71%	72%	60%
Attitude & professionalism of embassy staff	92%	92%	88%	88%	80%
Embassy staff for their objectivity & acting in your best interests	79%	77%	81%	74%	61%
Quality & relevance of any contacts made	59%	41%	72%	61%	45%

Annex B – China Britain Business Council (CBBC)

The following tables provide the key survey results for support provided by the CBBC. Results have been shown separately for significant assists, events and OMIS service deliveries⁵².

Figure B.1 Measure A01 – Number of Firms Supported (CBBC)

	CBBC Total	CBBC Sig. Assists	CBBC Events	CBBC OMIS
Number of Firms Supported (A01)				
PIMS 32 (Jan-Mar 13)	485	218	230	37
PIMS 33 (Apr-Jun 13)	733	351	359	23
PIMS 34 (Jul-Sep 13)	716	257	437	22
PIMS 35 (Oct-Dec 13)	392	135	219	38
Completeness & Accuracy of Records (PIMS 35)				
% of records complete	100%	100%	100%	100%
% with contact details incorrect	15%	24%	9%	6%
% refusing as no/minimal support	11%	12%	13%	6%

Figure B.2 Profile – CBBC

		CBBC Total	CBBC Sig. Assists	CBBC Events	CBBC OMIS
<i>Base</i>		124	50	50	24
Growth objectives	Substantial	39%	40%	34%	54%
	Substantial or moderate	85%	88%	84%	88%
Innovative firms	Yes	85%	86%	86%	79%
	Yes (alternative)	58%	62%	52%	67%
Age	0-5 years	18%	22%	18%	4%
	6-10 years	10%	10%	8%	17%
	>10 years	72%	68%	74%	79%
Size	<10 emps	34%	42%	30%	29%
	10-249 emps	50%	48%	48%	63%
	250+ emps	13%	8%	18%	4%
Export experience	<2 years	19%	18%	18%	29%
	2-10 years	30%	36%	28%	17%
	>10 years	50%	46%	54%	54%

⁵² Please note that CBBC OMIS users are included in the main OMIS results throughout this report. CBBC Significant Assists and CBBC Events have not been reported separately in the report but have been included in the 'total' figures.

Figure B.3 Key Measures – CBBC

	CBBC Total	CBBC Sig. Assists	CBBC Events	CBBC OMIS
<i>Base</i>	124	50	50	24
Quality Rating (A09)	78%	83%	75%	78%
Overall Satisfaction (B10)	75%	86%	66%	71%
Improved Business Performance	42%	46%	36%	63%
Increased Skills (A81)	53%	58%	48%	63%
Changed Behaviour (A83)	60%	64%	56%	79%
Increased R&D (AR&D)	13%	14%	10%	21%
Barriers Overcome (A92)	58%	64%	52%	67%
Sig. Business Benefit (A06)	66%	72%	58%	83%
£ Estimated Additional Profit (A49)	£66k	£45k	£23k	£335k
£ Estimated Additional Sales	£473k	£300k	£151k	£2,521k

Annex C – UK India Business Council (UKIBC)

The following tables provide the key survey results for support provided by the UKIBC. Results have been shown separately for significant assists and events⁵³.

Figure C.1 Measure A01 – Number of Firms Supported (UKIBC)

	UKIBC Total	UKIBC Sig. Assists	UKIBC Events
Number of Firms Supported (A01)			
PIMS 32 (Jan-Mar 13)	433	182	251
PIMS 33 (Apr-Jun 13)	202	56	146
PIMS 34 (Jul-Sep 13)	277	0	277
PIMS 35 (Oct-Dec 13)	412	103	309
Completeness & Accuracy of Records (PIMS 35)			
% of records complete	100%	99%	100%
% with contact details incorrect	21%	16%	26%
% refusing as no/minimal support	17%	16%	17%

Figure C.2 Profile – UKIBC

		UKIBC Total	UKIBC Sig. Assists	UKIBC Events
<i>Base</i>		70	30	40
Growth objectives	Substantial	41%	40%	40%
	Moderate	86%	87%	85%
Innovative firms	Yes	79%	77%	80%
	Yes (alternative)	57%	63%	53%
Age	0-5 years	39%	27%	43%
	6-10 years	15%	17%	15%
	>10 years	46%	57%	43%
Size	<10 emps	51%	27%	60%
	10-249 emps	29%	43%	23%
	250+ emps	15%	20%	13%
Export experience	<2 years	30%	20%	35%
	2-10 years	32%	30%	33%
	>10 years	38%	50%	33%

⁵³ Please note that UKIBC Significant Assists and UKIBC Events have not been reported separately in the report but have been included in the 'total' figures.

Figure C.3 Key Measures – UKIBC

	UKIBC Total	UKIBC Sig. Assists	UKIBC Events
<i>Base</i>	70	30	40
Quality Rating (A09)	81%	80%	83%
Overall Satisfaction (B10)	76%	77%	78%
Improved Business Performance	42%	27%	45%
Increased Skills (A81)	40%	33%	43%
Changed Behaviour (A83)	49%	40%	50%
Increased R&D (AR&D)	20%	10%	23%
Barriers Overcome (A92)	58%	53%	60%
Sig. Business Benefit (A06)	64%	67%	63%
£ Estimated Additional Profit (A49)	£254k	£749k	£78k
£ Estimated Additional Sales	£1,897k	£4,484k	£776k

Annex D – High Value Opportunities Support (HVO)

The following tables provide the key survey results for support provided through UKTI's High Value Opportunities programme. Results have been shown separately for significant assists and events. Please note that only events directly arranged by HVO have been included in the HVO Events category. HVO supported events are still covered in PIMS but are included in the main PIMS category in which they are recorded (e.g. Sector Events UK).

Figure D.1 Measure A01 – Number of Firms Supported (HVO)

	HVO Total	HVO Sig. Assists	HVO Events
Number of Firms Supported (A01)			
PIMS 32 (Jan-Mar 13)	32	32	0
PIMS 33 (Apr-Jun 13)	6	6	0
PIMS 34 (Jul-Sep 13)	14	14	0
PIMS 35 (Oct-Dec 13)	15	15	0
Completeness & Accuracy of Records (PIMS 35)			
% of records complete	100%	100%	-
% with contact details incorrect	14%	14%	-
% refusing as no/minimal support	0%	0%	-

Figure D.2 Profile – HVO

		HVO Total	HVO Sig. Assists	HVO Events
<i>Base</i>		24	24	0
Growth objectives	Substantial	54%	54%	-
	Substantial or moderate	96%	96%	-
Innovative firms	Yes	92%	92%	-
	Yes (alternative)	75%	75%	-
Age	0-5 years	25%	25%	-
	6-10 years	8%	8%	-
	>10 years	67%	67%	-
Size	<10 emps	25%	25%	-
	10-249 emps	50%	50%	-
	250+ emps	25%	25%	-
Export experience	<2 years	25%	25%	-
	2-10 years	13%	13%	-
	>10 years	63%	63%	-

Figure D.3 Key Measures – HVO

	HVO Total	HVO Sig. Assists	HVO Events
<i>Base</i>	24	24	0
Quality Rating (A09)	83%	83%	-
Overall Satisfaction (B10)	88%	88%	-
Improved Business Performance	33%	33%	-
Increased Skills (A81)	54%	54%	-
Changed Behaviour (A83)	67%	67%	-
Increased R&D (AR&D)	8%	8%	-
Barriers Overcome (A92)	54%	54%	-
Sig. Business Benefit (A06)	71%	71%	-
£ Estimated Additional Profit (A49)	£25k	£25k	-
£ Estimated Additional Sales	£274k	£274k	-

Firms receiving support through the HVO programme were also asked whether the assistance received related to specific contracts or opportunities. If so, they were asked whether they were aware of these opportunities before accessing the UKTI support, and whether the support improved their chances of winning these contracts.

Figure D.4 Specific Contract/Opportunities – HVO

	HVO Total	HVO Sig. Assists	HVO Events
<i>Base</i>	24	24	0
Did the assistance/event relate to any specific contracts or opportunities?			
Yes	50%	50%	-
No	50%	50%	-
Don't know/can't remember	0%	0%	-
Were you already aware of these contracts or opportunities before accessing the support?			
Aware of all of them	13%	13%	-
Aware of some of them	13%	13%	-
Not aware	25%	25%	-
Did not relate to specific contracts/opps	50%	50%	-
Did the support improve your chances of winning this business?			
Greatly improved chances	17%	17%	-
Slightly improved chances	21%	21%	-
No impact in this respect	13%	13%	-
Don't know/can't remember	0%	0%	-
Did not relate to specific contracts/opps	50%	50%	-

Annex E – Analysis by Membership of Business Bodies

This annex provides the key survey results analysed by whether or not firms are members of any trade associations, sector bodies, the Chamber of Commerce or other organisations representing business (e.g. the CBI or FSB).

Figure E.1 Profile – By Membership of Business Bodies

		Member of Any Business Bodies/Organisations	
		Yes	No
<i>Base</i>		2739	1255
Growth objectives	Substantial	47%	44%
	Substantial or moderate	93%	89%
Innovative firms	Yes	90%	81%
	Yes (alternative)	68%	58%
Age	0-5 years	21%	42%
	6-10 years	16%	19%
	>10 years	64%	39%
Size	<10 emps	37%	62%
	10-249 emps	52%	31%
	250+ emps	9%	2%
Sector	Services	59%	69%
	Production	39%	30%
	Other	2%	1%
Export experience	<2 years	20%	38%
	2-10 years	34%	39%
	>10 years	46%	22%

Figure E.2 Key Measures – By Membership of Business Bodies

	Member of Any Business Bodies/Organisations	
	Yes	No
<i>Base</i>	2739	1255
Quality Rating (A09)	77%	76%
Overall Satisfaction (B10)	73%	77%
Improved Business Performance	53%	53%
Increased Skills (A81)	54%	53%
Changed Behaviour (A83)	58%	54%
Increased R&D (AR&D)	16%	18%
Barriers Overcome (A92)	62%	63%
Sig. Business Benefit (A06)	71%	70%
£ Estimated Additional Profit (A49)	£187k	£225k
£ Estimated Additional Sales	£2.0m	£1.6m

Annex F – Equality Monitoring Analysis

For the purposes of equality monitoring, this annex provides results to the key survey measures (and additionality) for those firms that are equally or majority-led by female, ethnic minority or disabled owners, partners or directors. Results have also been shown for all PIMS respondents for comparative purposes, although please note that this analysis is based only on PIMS 33 as these questions are only included once a year.

When interpreting the result for firms that are led by owners, partners or directors with a longstanding illness or disability, the low base size should be taken into account.

Figure F.1 Key Measures – By Equality Groups (PIMS 33 only)

	Total (PIMS 33)	50%+ owners, partners, directors that are...		
		Female	Ethnic minority	Disabled/infirm
<i>Base: PIMS 33 respondents</i>	1086	268	112	33
Quality Rating (A09)	78%	75%	72%	78%
Overall Satisfaction (B10)	78%	75%	68%	84%
Improved Business Performance	48%	48%	44%	76%
Increased Skills (A81)	56%	55%	54%	52%
Changed Behaviour (A83)	57%	61%	54%	62%
Increased R&D (AR&D)	15%	20%	18%	14%
Barriers Overcome (A92)	65%	68%	61%	70%
Sig. Business Benefit (A06)	72%	74%	68%	72%
<i>Fully additional</i>	27%	33%	21%	24%
<i>Partially additional</i>	54%	49%	51%	56%
<i>Non-additional</i>	20%	18%	28%	21%

Annex G – Analysis Over Time

G.1 UKTI Total

This annex shows performance against the key measures over time for UKTI trade development services as a whole. Due to the size of the tables, this has been provided in Excel. Please click on the link below to access this analysis.



Key measures over
time - UKTI total

In order to provide comparable data over time, all results for previous waves exclude 'light' support (i.e. ER Events of less than half a day, the Website Business Opportunities service and Webinars).

G.2 Individual Services

This annex shows performance against the key measures over time for each individual UKTI service.



Key measures over
time - Individual servi

G.3 Intellectual Property Protection

All firms receiving support through Passport, GGG, ERTA Significant Assists, DSO Significant Assists and HVO Significant Assists were asked whether their International Trade Advisor had spoken to them about any intellectual property protection issues. This annex provides results for this question over time.



IPP advice over time
- Selected services

Annex H - Weighting

Since the sampling fractions differ considerably across the different UKTI services there is a clear need to weight the data before any analysis can be conducted at the overall level. It is also the case that for some services a disproportionate stratified sampling approach was taken, which again has resulted in unequal sampling fractions (although to a far lesser extent than across services). A number of potential weighting approaches were considered during the initial development of the PIMS surveys. These approaches were explored via test analysis and it was decided that weighting across service was the most appropriate course of action (since weighting within service made little discernable difference to the results). The weights applied in each of the waves covered by this report are set out below.

Figure H.1 Weights

	PIMS 32	PIMS 33	PIMS 34	PIMS 35
Passport	0.182	0.154	0.143	0.143
GGG	0.177	0.211	0.298	0.184
EMRS	0.188	0.277	0.166	0.184
ERTA Sig. Assists	1.092	0.917	1.007	0.902
ER Events	1.424	1.402	1.381	1.512
ECR	0.515	0.690	0.921	0.821
HQ Events	1.401	1.304	1.139	1.587
OMIS	0.639	0.616	0.505	0.590
MVS	1.448	1.202	1.370	1.391
TAP SOLO	0.969	1.259	1.121	1.041
TAP Group	1.446	1.343	1.319	1.482
TAP Non Funded	1.539	1.407	1.551	1.530
Outward Mission	1.366	0.141	0.538	0.265
Inward Mission	-	0.476	-	-
Sector Events UK	1.435	1.342	1.505	1.480
Posts Sig. Assists	1.115	1.496	1.324	1.352
Posts Events	1.473	1.336	1.167	1.487
Website Business Opportunities	1.445	1.356	1.455	1.498
Sector Events Abroad	1.331	1.359	0.969	1.504
DSO Events	1.352	1.021	0.662	0.505
DSO Sig Assists	0.430	0.341	0.336	0.171
Webinars	-	-	1.059	1.095
CBBC Sig. Assists	1.050	1.223	0.838	0.551
CBBC Events	1.108	1.251	1.426	0.894
UKIBC Sig. Assists	0.876	0.293	-	0.421
UKIBC Events	1.209	0.763	1.355	1.262
HVO Sig. Assists	0.154	0.157	0.137	0.087

Annex I - Questionnaire

OMB RESEARCH LIMITED
UKTI Trade Development – PIMS 35 Questionnaire
April-May 2014

Code	Sample Group	Notes
B	Sector Events Abroad	
C	ECR	
E	Passport	Quotas by English region
F	OMIS	Includes a boost for China to cover CBBC OMIS support. F1 – OMIS delivered by posts F2 – OMIS delivered by CBBC
G1	TAP Group	
G2	TAP SOLO	
G4	Outward Missions	
G5	TAP Non-Funded	
I	CBBC Sig. Assists	
J	Posts Sig. Assists	
K	Int'l Business Specialists	To be covered in research but not included in main results. No sample PIMS 35 period
L	ERTA Sig. Assists	Quotas by English region.
M	EMRS	
N	Posts Events	
O	ER Events	
P	MVS	Quotas by English region
R	Inward Missions	
S	Sector Events UK	
T1	Web Business Opportunities	
X	DSO Events	
Y	DSO Sig. Assists	
Z	HQ Events	
AD	Gateway to Global Growth	
AE	CBBC Events	
AF	UKIBC Sig. Assists	
AG	UKIBC Events	
AH	HVO Sig. Assists	
AI	HVO Events	
AJ	Webinars	Those attending at least 50% of the webinar

INTRODUCTION

Ask for named respondent.

ASK ALL

Good morning/afternoon, my name is ... and I am calling on behalf of OMB Research, an independent market research agency. We have been commissioned by UK Trade & Investment and the Department for Business, Innovation & Skills to conduct an EVALUATION of the effectiveness <IF G5 of overseas tradeshows and exhibitions / ALL OTHERS to businesses of various activities supported by them>.

IF RECEIVED CONTACT LETTER (SEE VARIABLE "PRE-CONTACT LETTER")

You should have recently received a letter explaining that we were conducting this research.

TEXT FOR SAMPLE GROUP B (SECTOR EVENTS ABROAD)

I understand that you went to the <EVENT> in <MARKET> in <MONTH YEAR>.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This could have been arranged by UK Trade & Investment, a Trade Association or sector body, or the embassy or consulate in <MARKET>.

TEXT FOR SAMPLE GROUP C (ECR)

I understand that you received an Export Communications Review in <MONTH YEAR>.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: The Export Communications Review helps companies to develop effective communications strategies by providing advice on language and cultural issues. The review involves an in-depth discussion with a communications consultant who then prepares a report for your business.

TEXT FOR SAMPLE GROUP E (PASSPORT)

I understand that you have recently taken part in UK Trade & Investment's Passport to Export scheme.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: The Passport scheme is aimed at helping businesses who are either new to exporting or fairly inexperienced exporters. The scheme is made up of a number of elements including a readiness assessment and an export plan, and includes other services aimed at helping firms to research and visit prospective overseas markets. You would probably have accessed the scheme through your local UKTI International Trade Advisor.

TEXT FOR SAMPLE GROUP F (OMIS)

I understand that you have recently requested information, advice or support about < MARKET > from UK Trade & Investment through the Overseas Market Introduction Service (known as OMIS).

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY:

OMIS is a charged service delivered by UK Trade & Investment staff based in UK embassies and consulates overseas and can provide firms with both advice about a market and support during an overseas visit. This could include an analysis of possible market entry strategies, the identification of possible business partners and arranging for you to meet with key people when you visit the market itself. You may have accessed the service through an International Trade Advisor based in the UK, or UK Trade & Investment staff based in the embassy or consulate in the market in question <IF F2 , or through the China Britain Business Council (CBBC) >.

TEXT FOR SAMPLE GROUP G1 (TAP GROUP)

I understand that you attended < EVENT > in < MARKET > in < MONTH YEAR >, through the Tradeshow Access Programme (also known as TAP).

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: **TAP provides subsidised opportunities for UK firms to exhibit at International trade fairs. Your visit would probably have been organised by your Trade Association or an Accredited Trade Organisation, in conjunction with UK Trade & Investment.**

TEXT FOR SAMPLE GROUP G2 (TAP SOLO)

I understand that you received support from UK Trade & Investment under the Tradeshow Access Programme (also known as TAP) to attend <EVENT> in < MARKET > in <MONTH YEAR>.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: **TAP provides subsidised opportunities for UK firms to exhibit at International trade fairs.**

TEXT FOR SAMPLE GROUP G4 (OUTWARD MISSIONS)

I understand that you participated in a mission to < MARKET > in < MONTH YEAR >, organised by UK Trade & Investment

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: **UK Trade & Investment provides opportunities for UK firms to attend Sector Focussed Missions overseas such as the one you attended.**

TEXT FOR SAMPLE GROUP G5 (TAP NON-FUNDED)

I understand that you attended < EVENT > in < MARKET > in < MONTH YEAR >.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: **Your visit may have been organised by a Trade Association or another accredited organisation. UKTI works with Trade Associations, etc to help British companies at these events.**

TEXT FOR SAMPLE GROUP I (CBBC SIG. ASSISTS)

I understand that you received some information, advice or support from staff at the China Britain Business Council at some point between October and December 2013.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: **This could have been by any method, including email.**

TEXT FOR SAMPLE GROUP J (POSTS SIG. ASSISTS)

I understand that you received some information, advice or support from staff at the UK embassy or consulate in < MARKET > sometime between October and December 2013.

AS NECESSARY: I believe you dealt with <ADVISOR> from the embassy or consulate.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This could have been by any method, including telephone or email. You may have met staff from the embassy or consulate while attending a larger event.

INTERVIEWER NOTE:

- If the respondent explains that they received so little assistance that they can't justify doing an interview then use the 'Refused personally on the basis that support received was minimal/too insignificant to complete an interview' outcome code.
- However, do not use this outcome code just because the assistance they received wasn't very good, it should only be used to pick up cases where they didn't get any significant/substantial help.

TEXT FOR SAMPLE GROUP K (INTERNATIONAL BUSINESS SPECIALISTS)

I understand that you have received information, advice or support from one of UK Trade & Investment's international business specialists, at some point during the last 12 months.

AS NECESSARY: I believe that the International Business Specialist you dealt with was called <ADVISOR>.

TEXT FOR SAMPLE GROUP L (ERTA SIG. ASSISTS)

I understand that you have received information, advice or support from one of UKTI's International Trade Advisors, at some point during the last 12 months.

AS NECESSARY: I believe that the International Trade Advisor you dealt with was called <ADVISOR>.

TEXT FOR SAMPLE GROUP M (EMRS)

I understand that you have recently used UK Trade & Investment's Export Marketing Research scheme in relation to <MARKET>.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: The Export Marketing Research scheme provides firms with advice on how to research an export market as well as financial assistance towards the cost of conducting a marketing research project.

TEXT FOR SAMPLE GROUP N (POSTS EVENTS)

I understand that you attended the <EVENT> in <MARKET> in <MONTH YEAR>.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This could have been organised by UK Trade & Investment directly, by an overseas embassy or consulate, or by the Foreign Office.

INTERVIEWER NOTE – In a small number of cases, this event may have been put on by the company that you are speaking to, with help from the embassy or consulate. We still want to interview these firms, and the questionnaire will account for this.

TEXT FOR SAMPLE GROUP O (ER EVENTS)

I understand that you attended the < EVENT > in < MONTH YEAR >, organised by the International Trade Advisor in the < REGION > region.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This event would have provided you with information and advice specific to your industry and regarding business opportunities available overseas.

TEXT FOR SAMPLE GROUP P (MVS)

I understand that you visited < MARKET > in < MONTH YEAR >, through UK Trade & Investment's Market Visit Support programme. I believe this visit was organised by the International Trade Advisor in the < REGION > region.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: The Market Visit Support facility provides support and assistance to businesses visiting overseas markets either individually, or as part of an organised group.

TEXT FOR SAMPLE GROUP R (INWARD MISSIONS)

I understand that you attended the <EVENT> in < MONTH YEAR >, to which UK Trade & Investment had brought a number of visitors from overseas.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This meeting would have provided you with an opportunity to demonstrate your business offering to buyers, decision-makers or influencers from overseas.

TEXT FOR SAMPLE GROUP S (SECTOR EVENTS UK)

I understand that you attended the < EVENT > in < MONTH YEAR >, organised by either UK Trade & Investment or a Trade Association or sector body on their behalf.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This event would have provided you with information and advice specific to your industry and regarding business opportunities available overseas.

TEXT FOR SAMPLE GROUP T1 (WEBSITE BUSINESS OPPORTUNITIES)

I understand that back in <MONTH YEAR> you registered your interest in one of the business opportunities published on the UK Trade & Investment website, titled "<EVENT (THIS FIELD WILL CONTAIN THE OPPORTUNITY NAME)>".

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: UK Trade & Investment's website includes a Business Opportunities section. A summary of each opportunity or contract is put on the website by staff at UK embassies and consulates overseas, and firms can also sign up to email alerts about relevant opportunities. When firms register their interest in a particular opportunity they are then sent more detailed information about it from the overseas staff.

TEXT FOR SAMPLE GROUP X (DSO EVENTS)

I understand that you attended the < EVENT > in < MONTH YEAR >, organised by UK Trade & Investment's Defence & Security Organisation (DSO).

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This event would have provided you with information, advice or contacts specific to your industry and regarding business opportunities available overseas.

TEXT FOR SAMPLE GROUP Y (DSO SIGNIFICANT ASSISTS)

I understand that you have received information, advice or support from one of the international trade advisors at UK Trade & Investment's Defence & Security Organisation (DSO), during the last 12 months.

AS NECESSARY: I believe that the DSO International Trade Advisor you dealt with was called <ADVISOR>.

TEXT FOR SAMPLE GROUP Z (HQ EVENTS)

I understand that you attended the < EVENT > in < MONTH YEAR >, organised by UK Trade & Investment.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This event would have provided you with information and advice regarding business opportunities available overseas.

TEXT FOR SAMPLE GROUP AD (GATEWAY TO GLOBAL GROWTH)

I understand that you have recently received support through UK Trade & Investment's Gateway to Global Growth programme.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: The Gateway to Global Growth programme is a service for firms that have some export experience. It involves working with an International Trade Advisor, and normally includes a strategic review, planning and support to help firms' grow their overseas business. You may know this as G3, 3G or GGG.

TEXT FOR SAMPLE GROUP AE (CBBC EVENTS)

I understand that you attended the < EVENT > in < MONTH YEAR >, organised by the China Britain Business Council (CBBC).

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This event would probably have provided you with information and advice regarding business opportunities available in China.

TEXT FOR SAMPLE GROUP AF (UKIBC SIG. ASSISTS)

I understand that you received some information, advice or support from staff at the UK India Business Council sometime between October and December 2013.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This could have been by any method, including email.

TEXT FOR SAMPLE GROUP AG (UKIBC EVENTS)

I understand that you attended the < EVENT > in < MONTH YEAR >, organised by the UK India Business Council (UKIBC).

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This event would probably have provided you with information and advice regarding business opportunities available in India.

TEXT FOR SAMPLE GROUP AH (HVO SIG. ASSISTS)

I understand that you have received information, advice or support from one of UK Trade & Investment's international business specialists, during the last 12 months.

AS NECESSARY: I believe that the International Business Specialist you dealt with was called <ADVISOR>.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This support would have focussed on accessing business opportunities overseas.

TEXT FOR SAMPLE GROUP AI (HVO EVENTS)

I understand that you attended the < EVENT > in < MONTH YEAR >, organised by UK Trade & Investment.

READ OUT FURTHER IN-DEPTH DESCRIPTION AS NECESSARY: This event would have provided you with information and advice about business opportunities available overseas.

TEXT FOR SAMPLE GROUP AJ (WEBINARS)

I understand that back in < MONTH YEAR >, you participated in a webinar, titled "< EVENT (THIS FIELD WILL CONTAIN THE WEBINAR NAME) >". This webinar could have been organised by UK Trade & Investment or a British embassy or consulate overseas. It would probably have focussed on a specific country or market sector.

ALL SAMPLE GROUPS – DISPLAY UNDER MAIN DESCRIPTION:

INTERVIEWER NOTE:

- **SHOW IF 'SERVICE DELIVERY NOTES' IS NOT BLANK BUT DO NOT SHOW IF C, G1, G2 OR G5**
If available, the notes recorded by UKTI are shown below. They may be helpful in clarifying exactly what we want to talk about with the respondent, but may also be irrelevant. Please use them carefully and do NOT read them out verbatim:
 - <SERVICE DELIVERY NOTES>
- **SHOW IF (E, K, L, O, R, S, X, Y, Z, AD, AH, AI, AJ) & 'MARKET IS NOT BLANK**
If available the market is also shown below. <IF X, Z, AH, AJ: This might be the country where the event was held or might be the country that the event focussed on / E, K, L, O, R, S, Y, AD, AI: This should be the country that the support related to>.
 - <MARKET>
- **SHOW FOR ALL EXCEPT E & AD**
The exact date recorded on sample was <INTERVENTION DATE>.

ASK ALL

This research will cover areas such as your experiences of...

- B – this event in <MARKET>**
- C – the Export Communications Review**
- E - the Passport scheme**
- F – the Overseas Market Introduction Service**
- G1 – the Tradeshow Access Programme**
- G2 – the Tradeshow Access Programme**
- G4 - this event organised by UK Trade & Investment**
- G5 – this tradeshow**
- I - the support provided by the China Britain Business Council**
- J – the support provided by staff from the UK embassy or consulate in <MARKET>**
- K – the support provided by UKTI’s international business specialists**
- L – the support provided by your International Trade Advisor**
- M – the Export Marketing Research Scheme in relation to <MARKET>**
- N – this event in <MARKET>**
- O – this event organised by your International Trade Advisor**
- P – this Market Visit support**
- R – meeting with these overseas businesses**
- S – this event organised by UK Trade & Investment**
- T1 – using the website business opportunities service**
- V – receiving this report**
- X – this event organised by UKTI’s Defence & Security Organisation**
- Y - the support provided by the DSO international trade advisor**
- Z – this event organised by UK Trade & Investment**
- AD – the Gateway to Global Growth programme**
- AE – this event organised by the China Britain Business Council**
- AF - the support provided by the UK India Business Council**
- AG – this event organised by the UK India Business Council**
- AH – the support provided by UKTI’s international business specialists**
- AI – this event organised by UK Trade & Investment**
- AJ – this webinar**

..., your reactions to it and any subsequent benefits that have been felt by your business and will take around <IF AJ 15 / OTHERS 20 minutes>, depending on your answers. Is it convenient to speak to you now or would you prefer to make an appointment for another time?

REFERRALS CAN BE TAKEN TO ANY SITE WHEN THE CONTACT FEELS THAT THERE IS SOMEONE WITHIN THE COMPANY BETTER PLACED TO ANSWER QUESTIONS ON THE TOPIC AREAS OUTLINED

ADD IF NECESSARY

- The research is being conducted under the Code of Practice of the Market Research Society, which means that all of the answers you give are strictly confidential and anonymous. Participation in this survey is voluntary.**
- The responses of all organisations taking part will be combined into a statistical report**
- Your organisation was selected at random from a list supplied by UK Trade & Investment**

If you wish to check that OMB Research is a bona fide market research agency, you can contact the Market Research Society on 0500 396999, or call James Murray at OMB Research on 01732 220582 or contact Maria del Castillo at UK Trade & Investment on maria.delcastillo@ukti.gsi.gov.uk or 020 7215 8390.

ASK ALL

S1 – Can I confirm that you are one of the people best qualified to talk about your company’s experience of...

- B – this event
- C – the Export Communications Review on this occasion
- E - the Passport scheme
- F – the Overseas Market Introduction Service on this occasion
- G1 – the Tradeshow Access Programme on this occasion
- G2 – the Tradeshow Access Programme on this occasion
- G4 – this visit organised by UK Trade & Investment
- G5 – attending this tradeshow on this occasion
- I – the support provided by the China Britain Business Council on this occasion
- J – the support provided by staff from the UK embassy or consulate in <MARKET> on this occasion
- K – the support provided by the International Business Specialist during the last year
- L – the support provided by your International Trade Advisor during the last year
- M – the Export Marketing Research Scheme on this occasion
- N – this event
- O – this event organised by your International Trade Advisor
- P – this Market Visit support
- R – this meeting with overseas businesses
- S – this event organised by UK Trade & Investment
- T1 – using the website business opportunities service on this occasion
- X – this event organised by UKTI’s Defence & Security Organisation
- Y - the support provided by your DSO Advisor during the last year
- Z – this event organised by UK Trade & Investment
- AD – the Gateway to Global Growth programme
- AE – this event organised by the China Britain Business Council
- AF – the support provided by the UK India Business Council on this occasion
- AG – this event organised by the UK India Business Council
- AH – the support provided by the International Business Specialist during the last year
- AI – this event organised by UK Trade & Investment
- AJ – this webinar

....., including any benefits your business may have derived from it?

INTERVIEWER NOTE: IF KNOW ALREADY THAT YOU ARE SPEAKING TO THE CORRECT PERSON THEN CODE YES AUTOMATICALLY

REFERRALS CAN BE TAKEN TO ANY SITE WHEN THE CONTACT FEELS THAT THERE IS SOMEONE WITHIN THE COMPANY BETTER PLACED TO ANSWER QUESTIONS ON THE TOPIC AREAS OUTLINED

- Yes 1
- No – take referral and being transferred 2
- No – take referral and arrange callback 3
- No – refused referral..... 4

CATI TO INSERT TIME MARKER

SECTION S – SUPPORT DETAILS

READ OUT IF SAMPLE GROUP X OR Y

From now on I'll refer to UKTI's Defence & Security Organisation as 'DSO'.

READ OUT IF SAMPLE GROUP C

From now on I'll refer to the Export Communications Review as 'ECR'.

READ OUT IF SAMPLE GROUP M

From now on I'll refer to the Export Marketing Research Scheme as 'EMRS'.

READ OUT IF SAMPLE GROUP G1 OR G2

From now on I'll refer to the Tradeshow Access Programme as 'TAP'.

READ OUT IF SAMPLE GROUP I OR AE

From now on I'll refer to the China Britain Business Council as the 'CBBC'.

READ OUT IF SAMPLE GROUP F & F/SPLIT IS F2

I understand that the OMIS service was provided by the China Britain Business Council, who I'll refer to as 'CBBC' from now on.

READ OUT IF SAMPLE GROUP AF OR AG

From now on I'll refer to the UK India Business Council as the 'UKIBC'.

ASK ALL

S1f – Can I confirm that your organisation is a business rather than a trade association or public sector body? SINGLE CODE

- A business 1
- A trade association 2 – CLOSE
- A public sector organisation such as a Government department, local council, etc..... 3 – CLOSE
- Other (SPECIFY) 4
- (Don't know) 5

CLOSE SCREEN TO SAY

Thank you very much for your time, but on this occasion we are only looking to speak to businesses.

ASK ALL EXCEPT SAMPLE GROUPS B OR N

S1c – And was <IF G5 your attendance at / OTHERS the information, advice or support that you received through>

- C – ECR...?
- E – the Passport scheme...?
- F – OMIS...?
- G1 – TAP...?
- G2 – TAP...?
- G4 – this visit...?
- G5 – this tradeshow...?
- I – the CBBC...?
- J – staff from the embassy or consulate in <MARKET>...?
- K – the UKTI International Business Specialist...?
- L – your International Trade Advisor...?
- M – EMRS in relation to <MARKET>...?
- O – this event...?
- P – this Market Visit Support...?
- R – this meeting with overseas businesses...?
- S – this event...?
- T1 – the business opportunities service on this occasion...?
- V – this report...?
- X – this event...?
- Y – your DSO Advisor...?
- Z – this event...?
- AD – the Gateway to Global Growth programme...?
- AE – this event...?
- AF – the UKIBC...?
- AG – this event...?
- AH – the UKTI International Business Specialist...?
- AI – this event...?
- AJ – this webinar...?

READ OUT. SINGLE CODE

- In connection with your business 1
- Or, were you acting on behalf of another business 2 - CLOSE
- (Or was it not for business purposes i.e. personal use)..... 5 - CLOSE
- (Don't know) 6

CLOSE SCREEN TO SAY

Thank you very much for your time, but on this occasion we are only looking to speak to people accessing support in connection with their own business.

ASK IF SAMPLE GROUP N

S39a – Which of the following best describes the <EVENT> and the activities that it involved? Was it...? READ OUT. AIM FOR SINGLE CODE BUT MULTICODE ALLOWED

An exhibition or trade show	1
A trade mission or organised group visit	2
A seminar or lecture.....	3
A networking reception or function (AS NECESSARY: including lunches, dinners and business breakfasts).....	4
An event to provide a briefing about the market.....	5
Or, something else?.....	95
(Don't know)	97

ASK IF NETWORKING RECEPTION & NOT ANY OTHER PURPOSE (CODE 4 AT S39a & NOT CODES 1-3 OR 5-97 AT S39a)

S39e – And can I just check whether you were a guest at this reception or function, or was it actually organised or hosted by your company? SINGLE CODE

AS NECESSARY: By ‘organised or hosted by your company’ I mean that your company put on the event with help from the embassy or consulate - for example, they hosted it for you at official premises or helped with the practical arrangements.

Guest at event	1
Hosted/organised for their company	2
(Don't know)	3

ASK IF EVENT WAS ORGANISED FOR THEIR COMPANY (CODE 2 AT S39e)

S39f – Thinking about the role of the embassy or consulate staff in organising this event, which of the following did they do? READ OUT. CODE ALL THAT APPLY

Provide or help compile the guest list.....	1
Provide or help obtain a key speaker for the event, such as the ambassador ...	2
Undertake some or all of the practical arrangements for the event	3
Host the event at official premises such as the embassy or the ambassador's residence	4
(Other)	95
(None of these).....	96
(Don't know)	97

ASK IF EXHIBITION, MISSION, OTHER OR DON'T KNOW & NOT SEMINAR, RECEPTION OR BRIEFING ((CODES 1, 2, 95 OR 97 AT S39a AND NOT CODES 3, 4 OR 5 AT S39a)

S39b – Did you go to a specific event or function organised by the embassy or consulate while you were there <IF CODE 1 AT S39a , or did you just attend the main exhibition or trade show> ?

Yes, attended a specific event hosted by embassy/consulate.....	1
No <IF CODE 1 AT S39a, just attended the main exhibition/tradeshows>	2 - CLOSE
(Don't know)	3 - CLOSE

CLOSE SCREEN TO SAY

Thank you very much for your time. In fact on this occasion we are looking to speak to people that also attended an event organised by the embassy or consulate.

ASK IF SAMPLE GROUP N & CODE 1 AT S39b

S39c – Which of the following best describes the main purpose of this event or function organised by the embassy or consulate? Was it...?

READ OUT – AIM FOR SINGLE CODE BUT MULTICODE ALLOWED

A seminar or lecture.....	1
A networking reception or function (AS NECESSARY: including lunches, dinners and business breakfasts).....	2
An event to provide a briefing about the market.....	3
Or, something else?.....	95
(Don't know)	97 - CLOSE

CLOSE SCREEN TO SAY

Thank you very much for your time, but on this occasion we are looking to speak to people attending particular types of events.

ASK IF SEMINAR, RECEPTION OR BRIEFING & NOT EXHIBITION, MISSION, OTHER OR DON'T KNOW ((CODES 3, 4 OR 5 AT S39a) & (NOT CODES 1, 2, 95 OR 97 AT S39a))

S39d – Was <IF S39a=3 & NOT 4 OR 5 this seminar / IF S39a=4 & NOT 3 OR 5 this reception or function / IF S39a=5 & NOT 3 OR 4 this briefing event / IF S39a=3&4 & NOT 5 this seminar and reception / IF S39a=3 & 5 & NOT 4 this seminar and briefing event / IF S39a=4&5 & NOT 3 this reception and briefing event / IF S39a=3, 4 & 5 this seminar, reception and briefing event > associated with, or timed to coincide with, a larger event such as a trade fair or exhibition?

Yes	1
No	2
(Don't know)	3

ASK IF SAMPLE GROUP B OR (SAMPLE GROUP N & SEMINAR – CODE 3 AT S39a OR CODE 1 AT S39c)

S27a – <IF B Can I just check, was the < EVENT > a seminar at which you were one of the speakers? / IF N And were you one of the speakers at the seminar, or were you just one of the attendees?>

Yes, speaker.....	1
No, not a speaker.....	2
(Don't know).....	3

REALLOCATION OF SAMPLE GROUP B & N

- IF YES (CODE 1) AT S27a – ALLOCATE TO B1 (SPEAKER)
- IF NO/DK (CODE 2-3) AT S27a – ALLOCATE TO B2 (OTHER)
- IF YES (CODE 1) AT S27a – ALLOCATE TO N1 (SPEAKER)
- IF NO/DK (CODE 2-3) AT S27a OR NOT ASKED S27a – ALLOCATE TO N2 (OTHER)

TEXT SUBSTITUTIONS FOR SAMPLE GROUP N2 (N2 TEXT SUB)

- N2 & (S39c=1 & NOT 2, 3 OR 95) **the seminar hosted by the embassy or consulate**
- N2 & (S39c=2 & NOT 1, 3 OR 95) **the reception or function hosted by the embassy or consulate**
- N2 & (S39c=3 & NOT 1, 2 OR 95) **the briefing event hosted by the embassy or consulate**
- N2 & (S39c=95 & NOT 1, 2 OR 3) **the event hosted by the embassy or consulate**
- N2 & (S39c=1&2 & NOT 3 OR 95) **the seminar and reception hosted by the embassy or consulate**
- N2 & (S39c=1&3 & NOT 2 OR 95) **the seminar and briefing event hosted by the embassy or consulate**
- N2 & (S39c=2&3 & NOT 1 OR 95) **the reception and briefing event hosted by the embassy or consulate**
- N2 & (S39c=1, 2 & 3 & NOT 95) **the seminar, reception and briefing event hosted by the embassy or consulate**
- N2 & (S39c=95 & 1, 2 OR 3) **the events hosted by the embassy or consulate**

- N2 & (S39a=3 & NOT 4 OR 5) **the seminar**
- N2 & (S39a=4 & NOT 3 OR 5) **the reception or function**
- N2 & (S39a=5 & NOT 3 OR 4) **the briefing event**
- N2 & (S39a=3 & 4 & NOT 5) **the seminar and reception**
- N2 & (S39a=3 & 5 & NOT 4) **the seminar and briefing event**
- N2 & (S39a=4 & 5 & NOT 3) **the reception and briefing event**
- N2 & (S39a=3, 4 & 5) **the seminar, reception and briefing event**

IF (SAMPLE GROUP N1 & CODE 1 AT S39d OR CODES 1, 2, 4, 5, 95 OR 97 AT S39a) OR IF (SAMPLE B1 & CODE 1 AT S28)

For the rest of this interview I'd like you to focus just on this seminar that you spoke at.

IF SAMPLE GROUP N2 AND NOT CODES 2-3 AT S39d

For the rest of this interview I'd like you just to focus on <N2 TEXT SUB>, but not the wider event that it coincided with.

IF SAMPLE GROUP B1

S28 – And was the seminar associated with, or timed to coincide with a larger event, such as a trade fair or exhibition?

Yes 1
 No..... 2
 (Don't know) 3

IF SAMPLE GROUPS B1, B2, N1 OR N2

E6d – How long did <IF B1/N1 the seminar / IF B2 the event / IF N2 <N2 TEXT SUB>> last? Was it...? READ OUT. SINGLE CODE

SHOW IF N2

Interviewer note: If the event consisted of several different things (e.g. a seminar and a reception), ask the respondent to give the total combined time that these lasted

Up to half a day	1
Up to 1 day	2
More than 1 day.....	3
(Don't know)	4

ASK IF SAMPLE GROUP B2

S27f – Which of the following best describes the < EVENT >? Was it...? READ OUT. CODE ALL THAT APPLY

A networking reception or function (AS NECESSARY: including lunches, dinners and business breakfasts).....	1
A seminar at which you were in the audience, but not a speaker	2
An exhibition or trade show.....	3
Or, something else?.....	95
(Don't know)	97

ASK IF ATTENDED AN EXHIBITION/TRADE SHOW (CODE 3 AT S27f)

S27g – Were you invited to attend a specific event or function at the < EVENT > or were you just going to the main exhibition or trade show? SINGLE CODE

Expecting to attend a specific event/function	1
Just to attend the exhibition/tradeshow	2
(Other)	95
(Don't know)	97

ASK IF ATTENDED A NETWORKING RECEPTION (CODE 1 AT S27f) OR IF ATTENDED SPECIFIC EVENT AT EXHIBITION/TRADESHOW (CODE 1 AT S27g)

S27h – When you were invited, were you specifically expecting to be introduced to potential clients or business contacts <IF CODE 1 AT S27f , or were you just expecting a general social event>? SINGLE CODE

Expecting to be introduced to potential clients/contacts	1
Just expecting a general event	2
(Other)	95
(Don't know)	97

ASK IF SAMPLE GROUP R

S30 – Can I just confirm that you met with one or more overseas businesses at the <EVENT> in <MONTH YEAR>?

Yes	1
No.....	2 - CLOSE
Don't know.....	3 - CLOSE

CLOSE SCREEN TO SAY

Thank you very much for your time, but on this occasion we are looking to speak to people that met overseas businesses at these events

ASK IF SAMPLE GROUP R**S31 – And which of the following forms did this event take? Was it...?**

READ OUT. CODE ALL THAT APPLY

- One or more, pre-arranged one-to-one meetings with overseas companies1
 One or more one-to-one meetings with overseas companies that were NOT pre-arranged.....2
 Or, would you describe it as briefer contact with overseas companies, for example with companies you may have met at a larger event.....3
 (Other)95
 (Don't know)97

ASK IF SAMPLE GROUP O, S, X, Z, AE, AG & AI**S56a – Did you attend the < EVENT > to try and develop your overseas business, or were you only focussing on the UK side of your business?**

SINGLE CODE

- To develop overseas business.....1
 Only focussing on UK business2
 (Both).....3
 (Don't know)4- CLOSE

ASK IF ONLY FOCUSING ON UK BUSINESS (CODE 2 AT S56a)**S56b – And although you were only focussing on the UK side of your business, did this event ultimately have any benefit or impact on the development of your overseas business? SINGLE CODE**

- Yes - had impact on overseas business.....1
 No – no impact on overseas business2 - CLOSE
 (Don't know)3 - CLOSE

CLOSE SCREEN (FOR S56a&b) TO SAY**Thank you very much for your time, but on this occasion we are looking to speak to people that attended these events to develop their overseas business**ASK IF SAMPLE GROUP O, S, X, Z, AE, AG & AI**S35 – Which of the following forms did the < EVENT > take? Was it...?**

READ OUT. CODE ALL THAT APPLY

- An event or seminar that included one or more speaker presentations1
 An event where you were given an opportunity to meet and network with other companies2
 (An exhibition or trade show)3
 (Other)95
 (Don't know)97

ASK IF SAMPLE GROUP S OR O & SPEAKERS (CODE 1 AT S35)**S35c – And were any of these speakers actually based in the country that they were talking about?**

- Yes1
 No2
 (Don't know)3

ASK IF SAMPLE GROUP O, S, X, Z, AE, AG, AI & ATTENDED EXHIBITION/TRADE SHOW (CODE 3 AT S35)

S35a – Were you invited to attend a specific event or function at the < EVENT > or were you just going to the main exhibition or trade show? SINGLE CODE

Expecting to attend a specific event/function .. 1
 Just to attend the exhibition/tradeshaw 2 – CLOSE IF O, S, Z, AE, AG OR AI
 (Other) 95
 (Don't know) 97

CLOSE SCREEN TO SAY

Thank you very much for your time, but on this occasion we are looking to speak to people that attended specific events or functions

ASK IF SAMPLE GROUP X

S35b – And did you have contact with anyone from DSO while you were actually at this event?

Yes1
 No2
 (Don't know)3

ASK IF SAMPLE GROUP O, S, X, Z, AE, AG, AI AND NOT EXHIBITION/TRADE SHOW (NOT CODE 3 AT S35)

S36 – Can I just check, was this < IF S, O, Z, AI UK Trade & Investment / IF X DSO / IF AE CBBC / IF AG UKIBC> event or function part of a wider event?

Yes - part of wider event1
 No – solely a <IF O, S, Z, AI: UKTI / IF X: UKTI/DSO / IF AE: CBBC / IF AG: UKIBC> event2
 (Don't know)3

ASK IF SAMPLE GROUPS O, S, Z, AE, AG, AI AND PART OF LARGER EVENT (CODE 1 AT S36 OR CODE 3 AT S35)

For the rest of this interview I'd like you just to focus on the support you received through <IF S, O, Z, AI: UK Trade & Investment / IF AE the CBBC / IF AG: the UKIBC> at the < EVENT > and not the wider event.

IF SAMPLE GROUPS O, S, Z, X, AE, AG, AI

E6c – How long did the event itself last? Was it...? READ OUT. SINGLE CODE

Up to half a day 1
 Up to 1 day 2
 More than 1 day..... 3
 (Don't know) 4

ASK IF SAMPLE GROUPS O, S, Z, AI

S36b – As far as you can recall, were participants given the opportunity to meet any of UKTI's International Trade Advisors at this event?

Yes1
 No2
 (Don't know)3

IF SAMPLE GROUP O, S, Z, X, AI

S59a – And did this event focus on any specific contracts or opportunities overseas? SINGLE CODE.

- Yes 1
 No..... 2
 (Don't know) 3

IF RELATED TO SPECIFIC CONTRACTS/OPPORTUNITIES (CODE 1 AT S59a)

S59b – And were you already aware of these specific contracts or opportunities before you attended this event? IF YES, PROBE FOR WHETHER AWARE OF ALL OR SOME OF THESE CONTRACTS. SINGLE CODE

- Yes – aware of all of them 1
 Yes – aware of some of them 2
 No..... 3
 (Don't know) 4

IF SAMPLE GROUP O, S, Z, X, AI

S59c – And before you went, were you expecting this event to provide information about specific contracts or opportunities overseas? SINGLE CODE.

- Yes 1
 No..... 2
 (Don't know) 3

ASK IF SAMPLE GROUP F

S7a1 – Can I just check, did you receive any form of written report as part of the OMIS you commissioned about <MARKET>?

- Yes 1
 No..... 2
 (Don't know) 3

ASK IF SAMPLE GROUP F

S7a – Thinking about the support you received through OMIS about < MARKET >, which of the following did you receive? READ OUT. CODE ALL THAT APPLY. DO NOT ROTATE

- An analysis of the market in question, including information on things like the competition, opportunities, prospects and evaluation of market entry strategies 11
Lists of contacts, such as potential customers or business partners 12
Appointments with targeted contacts, such as potential customers or business partners..... 13
Organising an event for you in <MARKET> 14
One-to-one advice from the < IF F1 embassy / IF F2 CBBC> staff in <MARKET>..... 15
Other support in connection with a visit to <MARKET>, such as use of official premises or publicity for your firm 16
 Anything else? 95
 (Don't know) 97

ASK IF ORGANISED EVENT (CODE 14 AT S7a)

S7p – Thinking specifically about the help you got organising an event in <MARKET>, which of the following did they do? READ OUT. CODE ALL THAT APPLY. DO NOT ROTATE

Provide or help compile the guest list.....	1
Provide or help obtain a key speaker for the event, such as the ambassador ...	2
Undertake some or all of the practical arrangements for the event	3
Host the event at official premises such as the embassy or the ambassador's residence	4
(Other)	95
(None of these).....	96
(Don't know)	97

ASK IF SAMPLE GROUP F

S7b – And on this occasion, did you access the OMIS service through an International Trade Advisor based in the UK, or did you arrange it with the <IF F1 embassy or consulate / IF F2 CBBC staff> in < MARKET > directly?

INTERVIEWER NOTE: IF RESPONDENT HAD ANY CONTACT AT ALL WITH AN INTERNATIONAL TRADE ADVISOR IN RELATION TO OMIS PLEASE CODE AS 'ACCESSED THROUGH INTERNATIONAL TRADE ADVISOR'

Accessed through International Trade Advisor in UK.....	1
Arranged with < IF F1 the embassy or consulate / IF F2 CBBC> directly.....	2
(Other)	3
(Don't know)	4

IF ACCESSED OMIS THROUGH AN ITA (CODE 1 AT S7b)

S7c - Did the International Trade Advisor...? READ OUT. CODE ALL THAT APPLY.

Help you to decide which countries to cover	1
Help you draw up details of the specification that got sent to < IF F1 the embassy or consulate / IF F2 CBBC> in < MARKET >.....	2
(None of these).....	3

IF NOT ACCESSED OMIS THROUGH POST (CODES 1, 3 OR 4 AT S7b)

S7d – Can I just check, during the process did you have ANY direct contact with any of the staff based at <IF F1 the embassy or consulate / IF F2 CBBC > in < MARKET >?

Yes	1
No.....	2
(Don't know)	3

IF CONTACT WITH POST BUT NOT MAIN ACCESS POINT (CODE 1 AT S7d)

S7I – And did anyone from <IF F1 the embassy or consulate / IF F2 CBBC > contact you when you commissioned the OMIS to discuss or confirm your requirements?

Yes	1
No.....	2
(Don't know)	3

IF ACCESSED OMIS DIRECTLY THROUGH POST (CODE 2 AT S7b)

S7o – Was this as a result of meeting someone from <IF F1 the embassy or consulate / IF F2 CBBC > while they were visiting the UK, or did it come about in some other way? SINGLE CODE

- Through meeting <F1 embassy/consulate / F2 CBBC> staff in the UK 1
- Some other way..... 2
- (Don't know) 3

IF ANY CONTACT WITH POST INCLUDING MAIN ACCESS POINT (CODE 2 AT S7b OR CODE 1 AT S7d)

S7m – And did anyone from <IF F1 the embassy or consulate / IF F2 CBBC > contact you during the OMIS process to update you on progress?

- Yes 1
- No..... 2
- (Don't know) 3

ASK IF SAMPLE GROUP P

S8f – Did you go on this visit as part of an organised group of businesses or did you go alone? SINGLE CODE

- Organised group.....1
- Alone2
- (Don't know/can't remember)3

ASK IF SAMPLE GROUP G2 OR P

S7q – Before you went <IF G2 to <EVENT>/ IF P on this visit to <MARKET>>, did you have a conversation with one of UKTI's international trade advisors in the UK about the potential impact of this <IF G2 event / IF P visit> on your business?

- Yes 1
- No..... 2
- (Don't know) 3

ASK IF SAMPLE GROUP G5

S64a – Was your trip to <EVENT> organised by an Accredited Trade Organisation or your Trade Association?

- Yes 1
- No..... 2
- (Don't know) 3

ASK IF SAMPLE GROUP G5

S64b – And while you were at <EVENT>, did you take part in any events or activities supported by UKTI, or have any contact with anyone from UKTI?

AS NECESSARY: This could include events or activities put on by the British embassy or consulate in <MARKET>

- Yes 1
- No..... 2 – CLOSE IF S64a=2-3 & S64b=2-3
- (Don't know) 3 – CLOSE IF S64a=2-3 & S64b=2-3

CLOSE SCREEN TO SAY

Thank you very much for your time, but on this occasion we are looking to speak to people that attended tradeshows with assistance from their Trade Association or UKTI.

ASK IF SAMPLE GROUP G1 OR (G5 & CODE 1 AT S64a)

S7g – <IF G5 You mentioned that> Your trip to <EVENT> was mainly organised by an Accredited Trade Organisation or your Trade Association. Can I just check, other than their involvement in the practical arrangements, did they provide you with any other information or support in relation to your visit?

- Yes 1
- No..... 2
- (Don't know) 3

IF RECEIVED OTHER SUPPORT FROM ATO (CODE 1 AT S7g)

S7h – And did this include a written briefing or report about <MARKET>?

AS NECESSARY: This might have covered opportunities for your sector in this market

- Yes 1
- No..... 2
- (Don't know) 3

IF RECEIVED OTHER SUPPORT FROM ATO (CODE 1 AT S7g)

S7i – As far as you know, did any of the information provided by your Accredited Trade Organisation or trade association include material that had been provided by the embassy or consulate in <MARKET>?

- Yes 1
- No..... 2
- (Don't know) 3

ASK IF SAMPLE GROUPS G1, G2, G4, G5 OR P

S7j – <IF G4 At any point before or during this mission, / IF G1 OR G5 & CODE 1 AT S7i And other than this, > were you invited to commission any tailored information from the embassy or consulate in <MARKET>?

AS NECESSARY: You might have been invited to do so by < G1 OR G5 your International Trade Advisor, your Accredited Trade Organisation / G2 OR P your International Trade Advisor / G4 the mission organisers >, or by the staff at the embassy or consulate itself.

- Yes 1
- No..... 2
- (Don't know) 3

IF INVITED TO COMMISSION ANY TAILORED INFORMATION (CODE 1 AT S7j)

S7k – And did you actually commission this information?

- Yes 1
- No..... 2
- (Don't know) 3

ASK IF SAMPLE GROUP M

S8a – Thinking now about the support you received through EMRS in relation to <MARKET>, which of the following forms has it taken? READ OUT. CODE ALL THAT APPLY. DO NOT ROTATE

- A subsidy towards the cost of a bespoke market research project1
- A subsidy to go on your own visit to <MARKET>2
- A subsidy towards the cost of purchasing desk research3
- Other general advice about how to use export marketing research effectively4
- Anything else?95
- (Don't know)97

ASK IF SAMPLE GROUP AD

S46a – Can I just check, has your firm previously received support through UK Trade & Investment’s ‘Passport to Export’ scheme?

- Yes 1
- No..... 2
- (Don't know) 3

ASK IF SAMPLE AD & USED PASSPORT (CODE 1 AT S46a)

S46b – How long ago did you finish the Passport scheme? READ OUT AS NECESSARY. SINGLE CODE

- Within the last year 1
- 1-2 years ago..... 2
- 3 or more years ago..... 3
- (Still on Passport scheme) 4
- (Don't know) 5

IF SAMPLE GROUP AD & DONE PASSPORT (CODE 1 AT S46a)

For the rest of this interview I'd like you to focus just on the support you have received through the Gateway to Global Growth programme. Please do not include any support you received through Passport.

ASK IF SAMPLE GROUP AD

S47 – Thinking now about the support you have received to date through the Gateway to Global Growth programme, which of the following forms has it taken? READ OUT. CODE ALL THAT APPLY. DO NOT ROTATE

- One-to-one advice and support from your International Trade Advisor3
- A strategic review or ‘health-check’ to assess your current overseas activities and plans..... 1
- Formulation of an action plan.....2
- Follow-up advice and support from your International Trade Advisor to assess your progress4
- Training5
- Networking opportunities with other firms7
- Referrals to other UKTI support (e.g. OMIS, other support from overseas embassies or consulates, etc).....8
- Referrals to other non-UKTI support9
- Anything else?95
- (Don't know)97

ASK IF SAMPLE GROUP E**S6 – Thinking now about the support you have received to date through the Passport scheme, which of the following forms has it taken?**

READ OUT. CODE ALL THAT APPLY. DO NOT ROTATE

One-to-one advice and support from your local International Trade Advisor.....	3
An initial 'assessment' or 'diagnostic' to assess your current overseas activities and plans)	1
Formulation of an action plan.....	2
Follow-up advice and support from your International Trade Advisor to assess your progress.....	4
Training	7
Networking opportunities with other firms	9
Referrals to other UKTI support (e.g. OMIS, other support from overseas embassies or consulates, etc).....	5
Referrals to other non-UKTI support	6
Anything else?	95
(Don't know)	97

ASK IF SAMPLE GROUP E OR AD & RECEIVED TRAINING (CODE 7 AT S6 OR CODE 5 AT S47)**S47a - Was the training provided by UKTI or were you referred elsewhere?**

Provided by UKTI.....	1
Referred elsewhere	2
(Both).....	4
(Don't know)	3

ASK SAMPLE GROUP J**S40a – Can I firstly just ask, as part of the support you received from the embassy or consulate in <MARKET>, did you attend a specific reception, seminar, lecture or briefing event that was organised or hosted by the embassy or by UK Trade & Investment?**

INTERVIEWER NOTE: This is trying to identify firms that attended an event specifically organised by the embassy. If they met the embassy staff at a wider event or tradeshow that was not organised by the embassy then please code as 'no'.

Yes	1
No.....	2
Don't know.....	3

ASK IF ATTENDED EVENT (CODE 1 AT S40a)**S40b – In addition to attending this event did you receive any other information, advice or support directly from staff at the embassy or consulate in <MARKET>?**

Yes	1
No.....	2 - CLOSE
Don't know.....	3 - CLOSE

CLOSE SCREEN TO SAY

Thank you very much for your time. On this occasion we are looking to speak to firms that have received specific information, advice or support directly from the embassy or consulate, and not just attended an event.

READ OUT IF SAMPLE GROUP L

Throughout this interview please can you answer about all the support you have received from your International Trade Advisor during the last year.

AS NECESSARY: If you've only dealt with them on a single occasion in the last year that's fine, please just answer about that.

ASK SAMPLE GROUP L

S1x1 – At the time you received this assistance from your International Trade Advisor, was your company participating in either the Passport to Export Scheme or Gateway to Global Growth programme?

INTERVIEWER NOTES:

- If the company was previously on Passport or GGG but had finished before this support from the ITA then code as 'no'
- If the company joined Passport or GGG after this support from the ITA but was not on Passport/GGG at the time, then code as 'no'.
- If the respondent has never heard of Passport and GGG then just code as 'no'.

Yes – was on Passport or GGG at the time 1 - CLOSE
 No..... 2
 Don't know..... 3

CLOSE SCREEN TO SAY

Thank you very much for your time. On this occasion we are looking to speak to people that have received support from their International Trade Advisor that didn't fall under the Passport or Gateway to Global Growth schemes.

READ OUT IF SAMPLE GROUP K, Y OR AH

Throughout this interview please can you answer about all the support you have received from <IF K OR AH the International Business Specialist / IF Y your DSO Advisor> during the last year.

AS NECESSARY: If you've only dealt with them on a single occasion in the last year that's fine, please just answer about that.

ASK IF SAMPLE GROUP I, J, K, Y, AF, AH

S9 – Thinking about the information, advice or support you received from

- IF J the embassy or consulate staff in < MARKET >
- IF K/AH the International Business Specialist during the last year
- IF Y your DSO Advisor during the last year
- IF I the CBBC on this occasion
- IF AF the UKIBC on this occasion

...was this solely delivered by them or did they refer you to somewhere or someone else for any of it?

Yes – referred for some or all of it..... 1
 No – not referred for any of it..... 2
 (Don't know) 3

IF REFERRED (CODE 1 AT S9)

S9a – And were you referred...? READ OUT. CODE ALL THAT APPLY.

SHOW IF J, K, Y OR AH

INTERVIEWER NOTE: If they were referred to the China Britain Business Council (CBBC) or the UK India Business Council (UKIBC) please code this as **outside UKTI**.

- IF I OR AF: Within <IF I: CBBC / IF AF: UKIBC>? 1
- Within UK Trade & Investment <IF Y: or DSO>?..... 2
- Somewhere else outside of <IF I: CBBC and / IF AF: UKIBC and>
UK Trade & Investment <IF Y: or DSO>? 3
- (None of these)..... 4
- (Don't know) 5

IF REFERRED OUTSIDE UKTI (CODE 3 AT S9a)

S9b – Did <IF J the embassy or consulate staff in < MARKET > / IF K OR AH the International Business Specialist / IF Y your DSO Advisor / IF I the CBBC / IF AF the UKIBC> follow-up with you to see how this referral went and if it was helpful?

- Yes 1
- No..... 2
- (Don't know) 3

IF SAMPLE GROUP I, J, K, L, Y, AF, AH, E & AD

S37a –Were you offered the OMIS service by <IF J the embassy or consulate staff in <MARKET> / IF I the CBBC / IF AF the UKIBC / IF K OR AH the International Business Specialist / IF Y your DSO Advisor / IF L/E/AD your International Trade Advisor >?

AS NECESSARY: **OMIS is the ‘Overseas Market Introduction Service’. It is delivered by UK embassies and consulates overseas and can provide information about an overseas market and contacts for possible customers or business partners. It can also provide other help such as planning and organising events or promotional activity in overseas markets.**

- Yes 1
- No..... 2
- (Don't know) 3

IF OFFERED OMIS (CODE 1 AT S37a)

S37b – And did you actually use the OMIS service that you were offered on this occasion? IF NO, PROBE FOR WHETHER STILL PLANNING TO USE THE OMIS THEY WERE OFFERED

- Yes – used OMIS..... 1
- No – but planning to use it 2
- No – and not planning to use it 3
- (Don't know) 4

IF SAMPLE GROUP I, J, K, Y, AF, AH

S15 - Thinking now only about any information, advice or support that you received DIRECTLY through <IF J the embassy or consulate staff / IF K OR AH the International Business Specialist during the last year / IF Y your DSO Advisor during the last year / IF I the CBBC on this occasion/ IF AF the UKIBC on this occasion > <IF CODE 1 AT S37b , and excluding any support provided through OMIS >, which of the following forms did this support take? Did you receive...? READ OUT. CODE ALL THAT APPLY. DO NOT ROTATE

K, Y OR AH: General information about doing business overseas.....	1
J, I OR AF: An analysis of the market or general information about the market.....	9
Advice or information about a specific issue or problem.....	2
IF J, Y, OR AH: Political or diplomatic support.....	6
Introductions to, or help dealing with, potential customers, partners, etc.....	8
Lists of contacts.....	10
Anything else?	95
(No support received)	96
(Don't know)	97

ASK IF SAMPLE GROUP L

S15b – Thinking now only about the information, advice or support you received DIRECTLY through your International Trade Advisor during the last year <IF CODE 1 AT S37b , and excluding any support provided through OMIS >, which of the following forms did this take? READ OUT. CODE ALL THAT APPLY. DO NOT ROTATE

One-to-one advice from your International Trade Advisor.....	3
A strategic review or 'health-check' to assess your current overseas activities and plans.....	1
Formulation of an action plan.....	2
Referrals to training events or training providers.....	7
Referrals to networking events or opportunities	8
Anything else?	95
(No support received)	96
(Don't know)	97

IF (SAMPLE GROUP I, J, K, Y, AF, AH & (S9=1 OR S37a=1) & (S15=96)) OR IF (SAMPLE GROUP L & (S37a=1 OR S15b=7-8) & (S15b=NOT 1 & NOT 3))

S16 – Can I just check, other than referring you to somewhere or someone else who could help you < IF CODE 1 AT S37b and providing the OMIS service >, did

- IF J the embassy or consulate staff in < MARKET >
- IF K OR AH the International Business Specialist
- IF Y your DSO Advisor
- IF I the CBBC
- IF L the International Trade Advisor
- IF AF the UKIBC

.....provide you with ANY information, advice or support?

Yes	1
No.....	2
(Don't know)	3

REALLOCATION OF SAMPLE GROUPS FOR J, K, L, I, Y, AF & AH

- IF YES (CODE 1) AT S16 OR NOT ASKED S16 – ALLOCATE TO J1, K1, L1, I1, Y1, AF1, AH1
- IF NO OR DON'T KNOW (CODES 2-3) AT S16 – ALLOCATE TO J2, K2, L2, I2, Y2, AF2, AH2

IF SAMPLE GROUP I1, J1, K1, L1, Y1, AF1, AH1 OR IF SAMPLE GROUP E OR AD
S16b – Overall, how much time would you estimate that

- IF J the staff from the embassy or consulate in < MARKET >
- IF K OR AH the International Business Specialist
- IF Y your DSO Advisor
- IF I the CBBC
- IF L/E/AD your International Trade Advisor
- IF AF the UKIBC

.....spent providing the information, advice or support that you've received <IF E through the Passport scheme / IF AD through the Gateway to Global Growth programme / IF K/L/Y/AH during the last year>? Would you say it has been...? READ OUT

- More than a week of their time..... 1
- 3-5 day's work 2
- 1-2 day's work 3
- Or, less than a day's work..... 4
- (Don't know) 5

IF LESS THAN A DAY (CODE 4)

S16c – Would you say that is was more or less than an hour's work? READ OUT

- More than an hour's work 1
- Less than an hour's work 2
- (Don't know) 3

ASK IF SAMPLE GROUP E, AD OR L

S57 – Did your International Trade Advisor discuss the potential financial impacts of exporting or increasing your overseas activity? This could have included talking about the costs, the potential for revenue growth, etc.

- Yes 1
- No..... 2
- (Don't know) 3

IF SAMPLE GROUP AH

S58a – Did the assistance you received from the International Business Specialist relate to any specific contracts or opportunities overseas?

- Yes 1
- No..... 2
- (Don't know) 3

IF RELATED TO SPECIFIC CONTRACTS/OPPORTUNITIES (CODE 1 AT S58a)

S58b – And were you already aware of these specific contracts or opportunities before you spoke to the International Business Specialist? IF YES, PROBE FOR WHETHER AWARE OF ALL OR SOME OF THESE CONTRACTS. SINGLE CODE

- Yes – aware of all of them 1
- Yes – aware of some of them 2
- No..... 3
- (Don't know) 4

IF SAMPLE GROUP E, L, Y, AD, AH

S43 – And did <IF E, L OR AD your International Trade Advisor / IF Y your DSO Advisor / IF AH the International Business Specialist> speak to you at all about any Intellectual Property protection issues?

- Yes 1
- No..... 2
- (Don't know) 3

IF SAMPLE GROUP E, L, AD

S60 – And did your International Trade Advisor talk to you about dealing with language or cultural issues overseas, or refer you to any seminars or events that focussed on this?

- Yes 1
- No..... 2
- (Don't know) 3

IF SAMPLE GROUP T1

S54h – When you use the UKTI website business opportunities service, how do you find out about opportunities that might be relevant to your business? Do you...? READ OUT. SINGLE CODE

- Receive email alerts 1
- Search on the UKTI website directly 2
- Or both 3
- (Neither/do not look for opportunities) 5
- (Don't know) 4

READ OUT IF EMAIL ALERTS (CODES 1 OR 3 AT S54h)

For the remainder of this interview, when I talk about ‘opportunities on the UKTI website’ please include those that you receive email alerts about.

ASK IF SAMPLE GROUP T1

S54a – I'd now like to focus on the opportunity that you responded to in <MONTH YEAR>, titled “<EVENT (THIS FIELD WILL CONTAIN THE OPPORTUNITY NAME)>”. Did you receive a reply from the staff at the overseas embassy or consulate once you'd registered your interest in this business opportunity?

- Yes 1
- No..... 2
- (Don't know/Can't remember) 3

ASK IF GOT RESPONSE FROM POST (CODE 1 AT S54a)

S54b – Roughly how long after you registered your interest in the opportunity did you receive this reply? Was it...? READ OUT. SINGLE CODE

REMIND AS NECESSARY: **Please just give me your best estimate.**

- On the same day 1
- 1-2 days later..... 2
- Up to a week later..... 3
- 1-2 weeks later 4
- Or more than 2 weeks later..... 5
- (Don't know/Can't remember) 6

ASK IF GOT RESPONSE FROM POST (CODE 1 AT S54a)

S54c – After the initial reply from the staff at the overseas embassy or consulate, did you then obtain any further information or assistance from them in relation to this opportunity?

- Yes 1
- No..... 2
- (Don't know/Can't remember) 3

ASK IF GOT FURTHER INFO (CODE 1 AT S54c)

S54d – And did you have to pay for any of this additional information or assistance?

- Yes 1
- No..... 2
- (Don't know/Can't remember) 3

ASK IF DID NOT GET RESPONSE FROM POST (CODES 2-3 AT S54a)

S54e – Did you do anything else to try and pursue this opportunity?

- Yes 1
- No..... 2 - CLOSE
- (Don't know/Can't remember) 3 - CLOSE

CLOSE SCREEN TO SAY

Thank you very much for your time. On this occasion we are looking to speak to people that have had some contact with the overseas embassy or consulate in relation to these business opportunities.

ASK IF SAMPLE GROUP T1

S54f – Did you ultimately decide to try and win this particular business opportunity?

AS NECESSARY: **By this I mean did you contact the overseas company involved, put forward a tender or submit a proposal?**

REMIND AS NECESSARY: **The business opportunity we're focussing on was titled "<EVENT>".**

- Yes 1
- No..... 2
- (Don't know/Can't remember) 3
- (Did not relate to a specific contract / was just about general business opportunities) 4

ASK IF TRIED TO WIN OPPORTUNITY (CODE 1 AT S54f)**S54g – And were you...? READ OUT. SINGLE CODE**

INTERVIEWER NOTE: Code as 'Not heard yet' if they mention that it's on-going, pending, no decision's been made yet, or the contract hasn't been awarded yet.

- Successful (i.e. you won the contract) 1
- Unsuccessful 2
- Or have you not heard yet 3
- (Don't know) 4

ASK IF NOT HEARD YET (CODE 3 AT S54g)**S54i – And would you have expected to hear whether or not you'd been successful by now?**

- Yes 1
- No..... 2
- (Don't know/Can't remember) 3

ASK IF SAMPLE GROUP AJ**S61 – Roughly how much of the webinar session did you attend? SINGLE CODE**

AS NECESSARY: **By this I mean the time spent logged in and actively engaged with the webinar.**

- All of it..... 1
- Most of it..... 2
- About half 3
- Less than half of it..... 4 – CLOSE
- (Don't know) 5

CLOSE SCREEN TO SAY

Thank you very much for your time, but on this occasion we are only looking to speak to people who attended at least half of the webinar.

ASK IF SAMPLE GROUP AJ**S62 – And did you stay online for the Q&A session at the end of the webinar? IF YES PROBE WHETHER ALL OR SOME OF IT. SINGLE CODE**

- Yes – all of it..... 1
- Yes – some of it..... 2
- No 3
- (Don't know) 4
- (No Q&A after webinar)..... 5

ASK IF SAMPLE GROUP AJ**S63 – Thinking about the content of the webinar, which of the following did it cover? READ OUT. CODE ALL THAT APPLY**

- Information about a specific country..... 1
- Information about a specific sector 2
- General information or advice about doing business overseas 3
- Information about specific contracts or opportunities overseas 4
- (Other - SPECIFY)..... 5
- (Don't know) 6

ASK ALL EXCEPT SAMPLE GROUPS B1, N1, T1 & AJ

S1a – And which of the following areas did the information, advice or <IF G1, G2, G5 contacts / OTHERS support> you received through

- B2 – this event
- C – ECR
- E – the Passport scheme
- F – OMIS
- G1 – TAP
- G2 – TAP
- G4 – this visit
- G5 – this tradeshow
- I – the CBBC
- J – the embassy or consulate in < MARKET >
- K – the International Business Specialist
- L – your International Trade Advisor
- M – EMRS
- N2 – this event
- O – this event
- P – this Market Visit Support
- R – this meeting with overseas businesses
- S – this event
- X – this event
- Y – your DSO Advisor
- Z – this event
- AD – the Gateway to Global Growth programme
- AE – this event
- AF – the UKIBC
- AG – this event
- AH - the International Business Specialist
- AI – this event

...relate to? Was it...? READ OUT – CODE ALL THAT APPLY

Interviewer Note: If they received support with finding agents or distributors overseas or with licensing overseas, then this should go into 'Selling goods or service overseas' (and not 'Joint venturing, partnering or franchising')

- Selling goods or services overseas 1
- Sourcing raw materials or other goods overseas 2
- Joint venturing, partnering or franchising overseas 4
- Setting up an office or site overseas 5
- (Other) 6
- Don't know 7

IF SAMPLE GROUP J

S38 – And did any of the support you received on this occasion specifically relate to doing business with aid agencies, such as the World Bank or the World Health Organisation?

- Yes 1
- No 2
- (Don't know) 3

ASK IF SAMPLE GROUPS G1, G2 OR G5

A18 – Would you agree or disagree that <EVENT> is ‘the single most important international event’ for firms in your sector?

- Agree 1
 Disagree 2
 (Don't know) 3

ASK IF SAMPLE GROUP G1, G2 OR G5

S32 – Was this the first time that you had exhibited at this particular trade fair, either with or without UKTI assistance?

- Yes 1
 No..... 2
 (Don't know) 3

ASK IF ATTENDED FAIR PREVIOUSLY (CODE 2 AT S32)

S32b – In total, how many times have you exhibited at this particular trade fair?
 PROMPT AS NECESSARY

AS NECESSARY: It doesn't matter whether you exhibited with or without UKTI assistance, please just give me the total number of occasions.

- Twice 1
 Three times..... 2
 Four times..... 3
 Five times 4
 More than five times 5
 (Don't know/Can't remember) 6

IF SAMPLE GROUP G1, G2 OR G5 AND CODE 2 AT S32

For the rest of this interview I'd like you to focus just on your attendance at this trade fair in <MONTH YEAR>.

IF SAMPLE GROUP F, J, N1, N2

S44 - IF F: On this occasion did <IF F1 someone from UK Trade & Investment / IF F2 someone from the CBBC or UKTI > initially contact you about using OMIS, or did you initiate the contact with them?

IF J: On this occasion did someone from the embassy or consulate in <MARKET> initially contact you about the support you received, or did you initiate the contact with them?

IF N1/2: Did someone from UK Trade & Investment or the embassy or consulate initially contact you about the attending this event, or did you initiate the contact with them?

- They contacted us first..... 1
 We contacted them first 2
 (Other (SPECIFY))..... 3
 (Don't know) 4

IF SAMPLE GROUP C, E, K1, L1, O, R, S, X, Y1, Z, AD, AH1, AI, AJ

S22 – Which countries did < IF C, E, K1, L1, Y1, AD, AH: the support you received relate to / IF O, S, X, Z, AI: this event relate to / IF AJ this webinar relate to / IF R: the firms you met at this event come from>? WRITE IN

IF O, S, X, Z, AI, AJ

By this I mean were you attending this <IF O, S, X, Z, AI event / IF AJ webinar> to develop your business in any particular countries?

INTERVIEWER NOTE: Please record all countries mentioned as accurately as possible

.....

(No particular market)..... 2

(Don't know)..... 3

QUESTIONS DELETED FROM SECTION S:

- S1d, S1e, S2, S7e, S7f, S7n, S8b, S8c, S8d, S8e, S8g, S8h, S10, S11, S12, S13, S14, S17, S18a, S18b, S19, S20, S21, S27b, S27c, S27d, S27e, S29, S29b, S33, S34, S36c, S37c, S37d, S37e, S41, S45, S47b, S48a, S48b, S48c, S49, S50, S51, S52, S53a, S53b, S55a, S55b, S55c, B1g, B3l, B4f, B4j, B5i, B6h, B7f, B7j, B15h, B17d

CATI TO INSERT TIME MARKER

TEXT SUBSTITUTIONS FOR USE THROUGHOUT QUESTIONNAIRE

VARIATION 1

- B1 – speaking at the < EVENT >
- B2 – the < EVENT >
- C – ECR
- E – Passport
- F – OMIS
- G1 – < EVENT >
- G2 – < EVENT >
- G4 - the visit to < MARKET >
- G5 – < EVENT >
- I – the support available through the CBBC
- J – the support available through the embassy in < MARKET >
- K – the support available through the International Business Specialist
- L – the support available through your International Trade Advisor
- M – EMRS
- N1 – speaking at this event
- N2 – this event
- O – the < EVENT >
- P – the Market Visit Support
- R – this visit from overseas businesses
- S – the < EVENT >
- V – this report
- X – the < EVENT >
- Y – the support available through your DSO Advisor
- Z – the < EVENT >
- AD – Gateway to Global Growth
- AE – the < EVENT >
- AF – the support available through the UKIBC
- AG – the < EVENT >
- AH – the support available through the International Business Specialist
- AI – the < EVENT >
- AJ – this webinar

VARIATION 2

- B2 – attend the < EVENT >
- C – use the ECR service
- E – participate in Passport
- F – use the OMIS service
- G1 – attend this event through TAP
- G2 – attend this event through TAP
- G4 – visit < MARKET >
- G5 – attend this tradeshow
- I – contact the CBBC
- J – contact the embassy in < MARKET >
- K – contact the International Business Specialist
- L – contact your International Trade Advisor
- M – participate in EMRS
- N2 – attend this event
- O – attend the < EVENT >
- P – visit < MARKET > with Market Visit Support

- R – participate in this meeting with overseas businesses
- S – attend the < EVENT >
- V – request or read this report
- X – attend the < EVENT >
- Y – contact your DSO Advisor
- Z – attend the < EVENT >
- AD – participate in Gateway to Global Growth
- AE – attend the < EVENT >
- AF – contact the UKIBC
- AG – attend the < EVENT >
- AH – contact the International Business Specialist
- AI – attend the < EVENT >
- AJ – attend this webinar

VARIATION 3

- B1 – this event
- B2 – this event
- C – ECR
- E – Passport
- F – OMIS
- G1 – TAP
- G2 – TAP
- G4 – this visit to < MARKET >
- G5 – this tradeshow
- I – the support available through the CBBC
- J – the support available through the embassy in < MARKET >
- K – the support available through the International Business Specialist
- L – the support available through your International Trade Advisor
- M – EMRS
- N1 – this event
- N2 – this event
- O – this event
- P – Market Visit Support
- R – this meeting with overseas businesses
- S – this event
- T1 – the website business opportunities service
- V – this report
- X – this event
- Y – the support available through your DSO Advisor
- Z – this event
- AD – Gateway to Global Growth
- AE – this event
- AF – the support available through the UKIBC
- AG – this event
- AH – the support available through the International Business Specialist
- AI – this event
- AJ – this webinar

VARIATION 4

- B1 – speaking at the < EVENT >
- B2 – attending the < EVENT >
- C – using the ECR service

- E – participating in Passport
- F – using the OMIS service
- G1 – receiving support through TAP to attend this event
- G2 – receiving support through TAP to attend this event
- G4 – visiting < MARKET > on this mission
- G5 – attending this tradeshow
- I – your contact with the CBBC
- J – your contact with the staff from the embassy
- K – your contact with the International Business Specialist
- L – your contact with your International Trade Advisor
- M – participating in EMRS
- N1 – speaking at this event
- N2 – attending this event
- O – attending the < EVENT >
- P – visiting < MARKET > with Market Visit support
- R – participating in this meeting with overseas businesses
- S – attending the < EVENT >
- T1 – using the UKTI business opportunities service
- V – receiving this report
- X – attending the < EVENT >
- Y – your contact with the DSO Advisor
- Z – attending the < EVENT >
- AD – participating in Gateway to Global Growth
- AE – attending the < EVENT >
- AF – your contact with the UKIBC
- AG – attending the < EVENT >
- AH – your contact with the International Business Specialist
- AI – attending the < EVENT >
- AJ – participating in this webinar

VARIATION 5

- B1 – spoken at this event
- B2 – attended this event
- C – used the ECR service
- E – participated in Passport
- F – used the OMIS service
- G1 – received support through TAP to attend this event
- G2 – received support through TAP to attend this event
- G4 – visited < MARKET > on this mission
- G5 – attended this tradeshow
- I – received any assistance from the CBBC
- J – received any assistance from the embassy in < MARKET >
- K – received any assistance from the International Business Specialist
- L – received any assistance from your International Trade Advisor
- M – participated in EMRS
- N1 – spoken at this event
- N2 – attended this event
- O – attended this event
- P – visited < MARKET > with Market Visit support
- R – participated in this meeting with overseas businesses
- S – attended this event
- T1 – used the business opportunities service on the UKTI website

- V – received this report
- X – attended this event
- Y – received any assistance from the DSO Advisor
- Z – attended this event
- AD – participated in Gateway to Global Growth
- AE – attended this event
- AF – received any assistance from the UKIBC
- AG – attended this event
- AH – received any assistance from the International Business Specialist
- AI – attended this event
- AJ – attended this webinar

VARIATION 6

- B2 – the <EVENT>
- C – the ECR service
- E – Passport
- F – OMIS
- G1 – TAP
- G2 – TAP
- G4 – your UK Trade & Investment International Trade Team
- G5 – <EVENT>
- I – the CBBC
- J – the embassy in < MARKET >
- K – the International Business Specialist
- L – your International Trade Advisor
- M – EMRS
- N2 – this event
- O – the < EVENT >
- P – this Market Visit Support
- R – this meeting with overseas businesses
- S – the < EVENT >
- V – this report
- X – the < EVENT >
- Y – your DSO Advisor
- Z – the < EVENT >
- AD – Gateway to Global Growth
- AE – the < EVENT >
- AF – the UKIBC
- AG – the < EVENT >
- AH – the International Business Specialist
- AI – the < EVENT >
- AJ – this webinar

VARIATION 7

- B1 – speaking at this event
- B2 – attending this event
- C – use of the ECR service
- E – participation in Passport
- F – use of the OMIS service
- G1 – attendance at this event through TAP
- G2 – attendance at this event through TAP
- G4 – visit to < MARKET >

- G5 – attendance at this tradeshow
- I – contact with the CBBC
- J – contact with the staff from the embassy in < MARKET >
- K – contact with the International Business Specialist
- L – contact with your International Trade Advisor
- M – participation in EMRS
- N1 – speaking at this event
- N2 – attending this event
- O – attendance at this event
- P – visit to < MARKET >
- R – participation in this meeting with overseas businesses
- S – attendance at this event
- T1 – use of the website business opportunities service
- V – receipt of this report
- X – attendance at this event
- Y – contact with your DSO International Trade Advisor
- Z – attendance at this event
- AD – participation in Gateway to Global Growth
- AE – attendance at this event
- AF – contact with the UKIBC
- AG – attendance at this event
- AH – contact with the International Business Specialist
- AI – attendance at this event
- AJ – participation in this webinar

SECTION A – AWARENESS & ALTERNATIVES

ASK ALL EXCEPT SAMPLE GROUP T1**A5 – Before this interview, were you aware that...**

B1/B2/O/R/S/X/Z/AE/AG/AI: the <EVENT> was supported by UK Trade & Investment?

C: the ECR service is supported by UK Trade & Investment?

E: the Passport scheme is provided by UK Trade & Investment?

F: the OMIS service is provided by UK Trade & Investment?

G1/G2: the TAP service is provided by UK Trade & Investment?

G5: UK Trade & Investment had supported any of the activities that you took part in at this tradeshow?

G4: your visit to <MARKET> was supported by UK Trade & Investment?

I: the assistance available through the CBBC is supported by UK Trade & Investment?

J: the support you received from the embassy staff in <MARKET> was provided by UK Trade & Investment?

K/AH: the support you received from the International Business Specialist was provided by UK Trade & Investment?

L: the support you received from your International Trade Advisor was provided by UK Trade & Investment?

M: the Export Marketing Research Scheme is supported by UK Trade & Investment?

N1/N2: this event was supported by UK Trade & Investment?

P: the Market Visit Support service is provided by UK Trade & Investment?

Y: the support you received from your DSO Advisor was provided by UK Trade & Investment?

AD: the Gateway to Global Growth programme is provided by UK Trade & Investment?

AF: the assistance available through the UKIBC is supported by UK Trade & Investment?

AJ: this webinar was provided by UK Trade & Investment?

Yes 1
 No..... 2
 (Don't know/Can't remember) 3

IF SAMPLE GROUP I, AE, AF OR AG

S42 – Are you a member of the <IF I OR AE: China Britain Business Council / IF AF OR AG: UK India Business Council>? PROBE AS NECESSARY: Is this personal or corporate membership? SINGLE CODE

Yes, personal member..... 1
 Yes, corporate member 2
 No..... 3
 (Both personal & corporate member) 4
 (Don't know) 5

Activity additionality questions to be asked once a year in PIMS 34, PIMS 38, etc (other than A12 for OMIS which is asked every wave)

ASK IF SAMPLE GROUP F

A12 – Can I just check, if <VARIATION 3> had not been available, would you have commissioned something similar from someone external to your business? PROBE AS PER PRECODES

- Yes – definitely 1
 Yes – probably 2
 Probably not 3
 Or, definitely not 4
 (Don't know) 5

A13, A14, A15, A16, A17, A19a, A19b, A20 DELETED UNTIL PIMS 38

Activity Additionality

The support is judged to be **additional** if....

- *OMIS, EMRS, ECR*
 - Would probably/definitely not have commissioned similar from external source (A12=3-4)
- *TAP Group*
 - Would probably/definitely not have exhibited at trade fair or probably/definitely not have gone with similar delegation (A13=3-4 or A14=3-4)
- *TAP Solo & TAP Non-funded*
 - Would probably/definitely not have exhibited at trade fair (A13=3-4)
- *Outward Mission*
 - Would probably/definitely not have visited market (A17=3-4)
- *MVS*
 - If attended with group: Would probably/definitely not have visited market or probably/definitely not have gone with similar delegation (S8f=1 & (A15=3-4 or A16=3-4))
 - If attended alone: Would probably/definitely not have visited market (S8f=2-3 & A15=3-4)
- *Passport, GGG & ERTA Sig. Assists*
 - Would not have been able to obtain similar support or would not have done so (A19a=3-4 or A19b=2-4)
- *Webinars*
 - Would not have been able to obtain similar information from a non-UKTI source (A20=3-4)

CATI TO INSERT TIME MARKER

SECTION B – QUALITY & SATISFACTION

READ TO ALL

I'm now going to read through a list of service aspects and I would like you to rate your experience of each one, on a scale of 1 to 5, where 5 is 'very good' and 1 is 'very poor'.

ALL QUALITY RATINGS IN SECTION B TO USE THE FOLLOWING SCALE

1 – Very poor	1
2 - Poor.....	2
3 - Average.....	3
4 - Good	4
5 – Very good	5
(Don't know/Can't remember)	6
(Not applicable)	7

IF SAMPLE GROUP E & AD

B1 - Thinking specifically about the International Trade Advisor that you have been working with in the context of the < IF E Passport scheme / IF AD Gateway to Global Growth programme >, how would you rate this person in terms of being... ROTATE a-c

- (a) Impartial**
- (b) Competent and knowledgeable**
- (c) Able to communicate in a clear and effective manner**

And how would you rate... DO NOT ROTATE D, K & L

(d) The quality and relevance of the information and advice you have received from your International Trade Advisor

IF SAMPLE AD & CODE 8 AT S47

(k) The relevance of any referrals from your International Trade Advisor to other UKTI support

IF SAMPLE AD & CODE 9 AT S47

(l) The relevance of any referrals from your International Trade Advisor to other non-UKTI support

ASK ALL E & AD

And how would you rate...

(f) The attitude and professionalism of the International Trade Advisor

Measure A09 (Quality Rating) – Passport & Gateway

- (Weighted) average proportion of firms providing a rating of '4' or '5' for...
 - B1a – Impartiality of ITA – (17%)
 - B1b – Competence & knowledge of ITA (17%)
 - B1c – Ability of ITA to communicate (17%)
 - B1d – Quality & relevance of the information & advice (E - 25%, AD – 8%)
 - B1k – Quality & relevance of UKTI referrals (AD – 8%)
 - B1l – Quality & relevance of non-UKTI referrals (AD – 8%)
 - B1f – Attitude and professionalism of ITA (25%)
- *N.B: For Gateway the total weight of B1d, k & l must equal 25% (so if one or more not asked then weights for the others to be recalculated accordingly)*

IF SAMPLE GROUP F**B2 - How would you rate... ROTATE A, B & D**

IF F & CODES 11, 12, 13, 15, 16, 95 OR 97 AT S7a (I.E. SKIP IF ONLY SUPPORT WAS EVENT ORGANISATION)

(a) The quality and relevance of the information and advice you have received
IF F & CODES 11, 12, 13, 15, 16, 95 OR 97 AT S7a (I.E. SKIP IF ONLY SUPPORT WAS EVENT ORGANISATION)

(b) The clarity and ease of understanding of the information and advice provided

IF F & CODES 12, 13, 14 OR 16 AT S7a

(d) The quality and relevance of any contacts provided

IF F & CODE 14 AT S7a (ORGANISED EVENT)

(j) The organisation of the practical arrangements for the event

AS NECESSARY: You mentioned earlier that as part of the OMIS service, they arranged an event for you in <MARKET>

ALL SAMPLE GROUP F

And how would you rate...

(f) The communications between your business and < IF CODE 2 AT S7b the <IF F1 embassy / IF F2 CBBC> staff in < MARKET >, IF CODE 1 AT S7b your International Trade Advisor in the UK, IF CODES 3 OR 4 AT S7b the UKTI staff > throughout the process

IF F & YES AT S7d

(g) The communications between your business and the <IF F1 embassy / IF F2 CBBC> staff in <MARKET> throughout the process

IF F & YES AT S7d OR CODE 2 AT S7b (i.e. had any contact with the embassy)

And how would you rate the <IF F1 embassy / IF F2 CBBC> staff in <MARKET> for...ROTATE H & I

(h) their objectivity and acting in your best interests

(i) their attitude and professionalism

Measure A09 (Quality Rating) - OMIS

- (Weighted) average proportion of firms providing a rating of '4' or '5' for...
 - B2a – Quality and relevance of the information & advice (19%)
 - B2b – Clarity and ease of understanding of the information & advice (19%)
 - B2d – Quality & relevance of contacts (19%)
 - B2f – Communications (main contact – ITA/post/other) (8%)
 - B2g – Communications (post) (8%)
 - B2h – Objectivity (post) (4%)
 - B2i – Professionalism (post) (4%)
 - B2j – Organisation of event (19%)

IF SAMPLE GROUP G1 OR (G5 & CODE 1 AT S64a)

B3 – Your trip to <EVENT> was mainly organised by an Accredited Trade Organisation or your Trade Association. How would you rate the quality of the assistance provided by them... DO NOT ROTATE A & C

(a) In helping you to prepare for the event

(c) And how would you rate their organisation of the practical arrangements for the delegation

IF G1 OR G5 & RECEIVED BRIEFING/REPORT (CODE 1 AT S7h)

(s) You mentioned earlier that you received a written briefing or report from your Accredited Trade Organisation or Trade Association. How would you rate the quality and relevance of this briefing or report?

IF G1 OR G5

Thinking about your visit to <EVENT>, how would you rate...

DO NOT ROTATE E, F, U, T & G

(e) The overall quality of the event itself

(f) The quality and relevance of any contacts it allowed you to make

(u) The quality and relevance of any information you obtained

(t) The quality and profile of the UK delegation (AS NECESSARY: By 'delegation' I mean the other exhibitors from the UK)

ASK IF G1

B3j - Although your trip was mainly organised by an Accredited Trade Organisation or Trade Association, did you have any contact with your local UKTI International Trade Team?

AS NECESSARY This could have been before or during your trip.

Yes 1
 No..... 2
 (Don't know) 3

Measure A09 (Quality Rating) – TAP Group & TAP Non-Funded

- (Weighted) average proportion of firms providing a rating of '4' or '5' for...
 - B3a – ATO helping to prepare for the event (11%)
 - B3c – ATO organisation of practical arrangements (11%)
 - B3s – Quality & relevance of ATO report (11%)
 - B3e – Event quality (17%)
 - B3f – Quality & relevance of contacts (17%)
 - B3t – Quality & profile of UK delegation (17%)
 - B3u – Quality & relevance of information (17%)

ASK IF G1 & YES AT B3j

B3k – Did you discuss the role of this event, in terms of its usefulness to your business, with your International Trade Team prior to attending?

Yes 1
 No..... 2
 (Don't know) 3

IF G2 OR G4

B4 – How would you rate the assistance provided by < IF G2 your international trade advisor / IF G4 UKTI > ... DO NOT ROTATE A & I

ASK IF G4 OR IF G2

(a) In helping you to prepare for the < IF G2 event / IF G4 ‘mission’>

ASK IF G4 ONLY

(i) Their organisation of the practical arrangements for the mission

IF SAMPLE GROUP G2 OR G4

Thinking about the < IF G2 event / IF G4 mission> overall , how would you rate... ROTATE D, E, L & K

ASK IF G2 ONLY

(d) The overall quality of the event itself

ASK IF G2 OR G4

(e) The quality and relevance of any contacts it allowed you to make

ASK IF G2 ONLY

(l) The quality and relevance of any information you obtained

ASK IF G4 ONLY

(k) The quality of any activities arranged for the mission

Measure A09 (Quality Rating) – TAP Solo & Outward Missions

- (Weighted) average proportion of firms providing a rating of ‘4’ or ‘5’ for...
 - B4a – UKTI helping to prepare for the event (G2-33%, G4-17%)
 - B4i – UKTI Organisation of practical arrangements for mission (G4-17%)
 - B4d – Event quality (G2-33%)
 - B4e – Quality and relevance of contacts (G2-17%, G4-50%)
 - B4k – Quality of activities on mission (G4 – 17%)
 - B4l – Quality & relevance of information (G2 - 17%)

IF SAMPLE GROUP J, K, L, I, Y, AF, AH

B5 - Thinking specifically about....

IF J - the staff that you have been in contact with from the embassy or consulate in < MARKET >

IF I – the CBBC staff that you dealt with on this occasion

IF L - your International Trade Advisor

IF K/AH – the International Business Specialist that you dealt with

IF Y – your DSO International Trade Advisor

IF AF – the UKIBC staff that you dealt with on this occasion

.....how would you rate them in terms of being... ROTATE A, B & C

IF SAMPLE GROUP K, L, Y, AH

(a) Impartial

IF SAMPLE GROUP J, K, L, I, Y, AF, AH

(b) Competent and knowledgeable

IF SAMPLE GROUP J, K, L, I, Y, AF, AH

(c) Able to communicate in a clear and effective manner

IF SAMPLE GROUP J1, K1, L1, I1, Y1, AF1, AH1 ONLY

And how would you rate...

(d) The quality and relevance of the information and advice you received <IF K/L/Y/AH from them during the last year / IF I/AF on this occasion>

IF SAMPLE GROUP J1, I1 OR AF1 & RECEIVED CONTACT LISTS, INTRODUCTIONS OR POLITICAL SUPPORT (CODES 6 OR 8 OR 10 AT S15)

(m) The quality and relevance of any contacts it allowed you to make

IF SAMPLE GROUP J, K, L, I, Y, AF, AH

(g) And how would you rate the attitude and professionalism of...

J - the embassy or consulate staff

K/AH – the International Business Specialist

I – the CBBC staff

L - your International Trade Advisor

Y – your DSO Advisor

AF – the UKIBC staff

ASK IF SAMPLE GROUP J, I OR AF

(h) And how would you rate the <IF J embassy or consulate / IF I CBBC / IF AF UKIBC> staff for their objectivity and acting in your best interests?

Measure A09 (Quality Rating) – Posts Sig Assists, Int'l Bus Spec, ERTA Sig Assists, CBBC Sig Assists, UKIBC Sig Assists, HVO Sig Assists

- (Weighted) average proportion of firms providing a rating of '4' or '5' for...
 - B5a – Impartiality (K, L, Y, AH - 17%)
 - B5b – Competence & knowledge (K, L, Y, AH - 17%, J, I, AF - 13%)
 - B5c – Ability to communicate (K, L, Y, AH - 17%, J, I, AF - 13%)
 - B5d – Quality and relevance of the information & advice (25%)
 - B5g – Attitude and professionalism (25%)
 - B5h – Objectivity (J, I, AF - 13%)
 - B5m – Quality & relevance of contacts (J, I, AF - 13%)

IF SAMPLE GROUP AH & SUPPORT RELATED TO SPECIFIC OPPORTUNITY/ CONTRACT (CODE 1 AT S58a)

B5n – You mentioned earlier that the assistance you received from the International Business Specialist related to specific contracts or opportunities overseas. Would you say that this assistance...? READ OUT. SINGLE CODE.

- Greatly improved your chances of winning this business1
- Slightly improved your chances2
- Or had no impact in this respect3
- (Don't know)4

IF SAMPLE GROUP M AND CODE 1 AT S8a**B6 - How would you rate...****(a) The quality and relevance of the export marketing research project**IF SAMPLE GROUP M AND CODE 1 AT S8a**(f) Thinking specifically about your Export Marketing Research advisor, how would you rate the advice and assistance they provided to help you select and manage the research consultant?**IF SAMPLE GROUP M**l) <IF S8a=1 And / IF S8a=NOT 1 Thinking specifically about your Export Marketing Research advisor> , how would you rate the quality and relevance of any <IF S8a=1 other> advice or assistance they provided?**IF SAMPLE GROUP M**Still thinking about the Export Marketing Research advisor who advised you on this project, how would you rate them in terms of being... ROTATE C, D & E****(c) Impartial****(d) Competent and knowledgeable****(e) Able to communicate in a clear and effective manner**IF SAMPLE GROUP M**And how would you rate...****(g) Their attitude and professionalism****Measure A09 (Quality Rating) - EMRS**

- (Weighted) average proportion of firms providing a rating of '4' or '5' for...
 - B6a – Quality and relevance of MR project (17%)
 - B6c – EMRA – impartial (13%)
 - B6d – EMRA - competent & knowledgeable (13%)
 - B6e – EMRA - clear & effective communication (13%)
 - B6f – Help managing and selecting consultant (13%)
 - B6l – Quality & relevance of advice/assistance (17%)
 - B6g – EMRA attitude and professionalism (17%)

IF SAMPLE GROUP P

B7 – How would you rate the assistance provided by the International Trade Team in your region...

(a) In helping you to prepare for the visit

And thinking about the visit overall, how would you rate...DO NOT ROTATE E, L & I

(e) The quality and relevance of any contacts it allowed you to make

(l) The quality and relevance of any information you obtained

ONLY IF SAMPLE GROUP P & CODE 1 AT S8f

(i) The organisation of the practical arrangements for the visit

Measure A09 (Quality Rating) - MVS

- (Weighted) average proportion of firms providing a rating of '4' or '5' for...
 - B7a – ITT helping to prepare for the visit (33%)
 - B7e – Quality and relevance of contacts (17%)
 - B7i – Organisation of practical arrangements (33%)
 - B7l – Quality & relevance of information (17%)
 - *N.B: If did not attend as part of group, 50% weight for B7a, 25% for e & u*

IF SAMPLE GROUP R

B9 – How would you rate...

(b)The organisation of the practical arrangements for the meeting

And thinking about the meeting itself, how would you rate... ROTATE E & F

(e) The profile of the overseas delegation

(f) The quality and relevance of any contacts it allowed you to make

Measure A09 (Quality Rating) – Inward Missions

- (Weighted) average proportion of firms providing a rating of '4' or '5' for...
 - B9b – Organisation of practical arrangements (33%)
 - B9e– Profile of the delegation (33%)
 - B9f – Quality & relevance of contacts (33%)

IF (SAMPLE GROUP S, O, Z, X, AE, AG, AI) & CODE 1 AT S35

B10 – How would you rate the < EVENT > in terms of...

(p) The quality and relevance of the presentations

IF (SAMPLE GROUP S, O, Z, X, AE, AG, AI) & CODE 1 AT S35

B10 – And thinking specifically about the speakers how would you rate them in terms of being... ROTATE A & B

(a) Competent and knowledgeable

(b) Able to communicate in a clear and effective manner

DISPLAY ON B10p, a & b

INTERVIEWER NOTE: If the event included several speakers/presentations, please ask them to give an average rating based on all them

IF (SAMPLE GROUP S, O, Z, X, AE, AG, AI) & CODE 2 AT S35

B10 – How would you rate the < EVENT > in terms of...

(m) The quality and relevance of any contacts it allowed you to make

IF SAMPLE GROUP S, O, Z, X, AE, AG, AI

How would you rate...

(c) The organisation of the practical arrangements for the event

Measure A09 (Quality Rating) – Sector Events UK, ER Events, HQ Events, DSO Events, CBBC Events, UKIBC Events, HVO Events

- (Weighted) average proportion of firms providing a rating of ‘4’ or ‘5’ for...
 - B10a – Competence and knowledge (20%)
 - B10b – Clear and effective communication (20%)
 - B10m – Quality and relevance of any contacts (20%)
 - B10c – Organisation of practical arrangements for event (20%)
 - B10p – Quality and relevance of presentations (20%)

IF SAMPLE GROUP S, O, Z, X, AI & EVENT RELATED TO SPECIFIC OPPORTUNITY/ CONTRACT (CODE 1 AT S59a)

B10q – You mentioned earlier that this event focussed on specific contracts or opportunities overseas. Would you say that attending this event...? READ OUT. SINGLE CODE.

- Greatly improved your chances of winning this business1
- Slightly improved your chances2
- Or had no impact in this respect3
- (Don't know)4

IF SAMPLE GROUP B1 & N1

B15 – How would you rate the quality of the assistance provided by the UK Trade & Investment staff, including both the embassy staff and any UK based staff involved, in terms of ...

(b) Their organisation of the practical arrangements for the seminar

And how would you rate... DO NOT ROTATE

(d) The size of the seminar audience

(e) The profile of the seminar audience in terms of the right people being there

(g) The quality of the other speakers from the UK

(k) The quality and relevance of any contacts it allowed you to make

INTERVIEWER TO NOTE: IF ANSWERING ABOUT MORE THAN ONE SEMINAR
ASK FOR AN OVERALL/AVERAGE RATING

**Measure A09 (Quality Rating) – Sector Events Abroad (Seminars) & Posts
Events (Seminars)**

- (Weighted) average proportion of firms providing a rating of '4' or '5' for...
 - B15b – UKTI organisation of practical arrangements (20%)
 - B15d – Size of the audience (20%)
 - B15e – Profile of the audience (20%)
 - B15g – Quality of the other speakers from the UK (20%)
 - B15k – Quality and relevance of contacts (20%)

IF SAMPLE GROUP C (ECR)

B16 - How would you rate...

(a) The quality and relevance of the information and advice you have received

Now thinking specifically about the communications consultant who conducted the review and prepared the report, how would you rate them in terms of being... ROTATE C, D & E

(c) Impartial

(d) Competent and knowledgeable

(e) Able to communicate in a clear and effective manner

(f) And how would you rate the attitude and professionalism of the communications consultant?

Measure A09 (Quality Rating) - ECR

- (Weighted) average proportion of firms providing a rating of '4' or '5' for...
 - B16a – Quality and relevance (33%)
 - B16c – Consultant – impartial (17%)
 - B16d – Consultant - competent & knowledgeable (17%)
 - B16e – Consultant - clear & effective communication (17%)
 - B16f – Attitude & professionalism of consultant (17%)

IF SAMPLE GROUP B2 & N2

B17 – <IF N2 & NOT CODES 2-3 AT S39d Still thinking just about <N2 TEXT SUB>, > How would you rate the quality of the assistance provided by the UK Trade & Investment staff, including both the embassy staff and any UK based staff involved, in terms of ...

(a) Their organisation of the practical arrangements for the event

And how would you rate... ROTATE C, G & H

(c) The quality and relevance of any contacts it allowed you to make

ASK IF SEMINAR ((B2 AND CODE 2 AT S27f) OR (N2 AND CODE 2 AT S27a))

(g) The quality & relevance of the presentations

ASK IF BRIEFING (N2 AND CODE 5 AT S39a OR CODE 3 AT S39c)

(h) The quality & relevance of the briefing

Measure A09 (Quality Rating) – Sector Events Abroad (Other) & Posts Events (Other)

- (Weighted) average proportion of firms providing a rating of '4' or '5' for...
 - B17a – Organisation of practical arrangements (B2 33% / N2 25%)
 - B17g – Quality and relevance of presentations (B2 33% / N2 25%)
 - B17h – Quality and relevance of briefing (N2 25%)
 - B17c – Quality and relevance of contacts (B2 33% / N2 25%)

IF SAMPLE GROUP T1

B21 – For these questions I'd like you just to focus on the business opportunity titled <EVENT>. Thinking about the summary of this opportunity that was posted on the website, how would you rate... ROTATE A, B & C

(a) The quality and relevance of the information provided in this summary

(b) The clarity and ease of understanding of the information provided in this summary

(c) The level of detail provided about this opportunity

(d) And thinking about your experience of finding the business opportunity section of the website, how would you rate the ease of use and navigation of the site?

IF SAMPLE GROUP T1 & CONTACT FROM POST (CODE 1 AT S54a)

I'd now like you to think specifically about the contact you had with the staff at the overseas embassy or consulate in relation to this particular opportunity, including both the initial response after registering your interest and any further dealings you had with them. How would you rate... ROTATE E, F & G

(e) The quality and relevance of the information provided by the embassy or consulate staff

(f) The clarity and ease of understanding of the information provided by the embassy or consulate staff

(g) The level of detail the embassy or consulate staff provided about this opportunity

IF SAMPLE GROUP T1 & CONTACT FROM POST (CODE 1 AT S54a)

(j) And <IF CODE 1 AT S54c still thinking about both their initial response and any further contact you had with them, > how would you rate their speed of response?

Measure A09 (Quality Rating) – Website Bus Opps

- (Weighted) average proportion of firms providing a rating of ‘4’ or ‘5’ for...
 - B21a – Quality and relevance of info in summary (14%)
 - B21b – Clarity & ease of understanding of info in summary (14%)
 - B21c – Level of detail in summary (14%)
 - B21d – Ease of use and navigation (16%)
 - B21e – Quality and relevance of info from post (11%)
 - B21f – Clarity & ease of understanding of info from post (11%)
 - B21g – Level of detail from post (11%)
 - B21j – Speed of response from post (11%)

IF SAMPLE GROUP T1 & CODES 1-3 AT B21c

B21h – You only gave a score of < INSERT SCORE FROM B21c > out of 5 for the level of detail provided in the summary that was posted on the website. Was this because the summary...? READ OUT. SINGLE CODE

- Did not contain enough detail..... 1
- Or because it contained too much detail 2
- (Don't know) 3

IF SAMPLE GROUP T1 & CODES 1-3 AT B21g

B21i – You <IF B21c=1-3 also >only gave a score of < INSERT SCORE FROM B21g > out of 5 for the level of detail provided by the embassy or consulate staff. Was this because they...? READ OUT. SINGLE CODE

- Did not provide enough detail 1
- Or because they provided too much detail 2
- (Don't know) 3

IF SAMPLE GROUP AJ

B23 – Thinking specifically about the speakers at this webinar, how would you rate... ROTATE A & B

- (a) Their knowledge and expertise**
- (b) Their ability to communicate in a clear and effective manner**

And how would you rate...

(c) The quality and relevance of the information provided in the webinar presentations

I'd now like you to think specifically about the webinar software and technology. How would you rate...

- (d) The ease of installing the software and logging on**
- (e) The reliability and quality of the webinar streaming (e.g. the audio and visuals)**
- (f) The ease of using the system during the webinar (e.g. asking questions, etc)**

Measure A09 (Quality Rating) – Webinars

- (Weighted) average proportion of firms providing a rating of ‘4’ or ‘5’ for...
 - B23a – Knowledge & expertise (20%)
 - B23b – Clear and effective communication (20%)
 - B23c – Quality and relevance of info (20%)
 - B23d – Ease of set-up (13%)
 - B23e – Reliability & quality of streaming (13%)
 - B23f – Ease of using the system (13%)

IF SAMPLE GROUP AJ

B24 – I’d now like to move on to thinking about how the webinar compared with your initial expectations. To what extent were your expectations met when it comes to...

- a) The topics covered in the webinar?
- b) The level of detail provided in the webinar?

Were your expectations...? READ OUT. SINGLE CODE

Exceeded	1
Fully met.....	2
Met in the main	3
Partially met.....	4
Or, not met at all.....	5
(Don’t know)	6
(Did not have any prior expectations).....	7

ASK ALL

B12 - Thinking now about your TOTAL experience of < VARIATION 4 > <IF C, F, I, J, M, T1, AF on this occasion, > how would you rate your satisfaction overall? Please give me a score between 1 and 5, where 5 means ‘very satisfied’ and 1 means ‘very dissatisfied’.

1 – Very dissatisfied.....	1
2 – Fairly dissatisfied	2
3 – Indifferent.....	3
4 – Fairly satisfied.....	4
5 – Very satisfied	5
(Don’t know/Can’t remember)	6

Measure B10 (Overall Satisfaction)

- Proportion of firms that are ‘fairly satisfied’ or ‘very satisfied’ with the support (4-5 out of 5 at B12)

IF (SAMPLE GROUP F, X, S OR AJ) AND CODES 1-2 AT B12 ASK

B12a - Thinking about your reasons for giving a score of < INSERT SCORE FROM B12 > out of 5, what aspect of the service would you say was the least satisfactory?

.....
.....

QUESTIONS DELETED FROM SECTION B:

- B1e, B1h, B1i, B1j, B2e, B3b, B3d, B3h, B3i, B3m, B3p, B3q, B3r, B4b, B4c, B4g, B4h, B5e, B5f, B5j, B5k, B5l, B6b, B6i, B6j, B6k, B7b, B7c, B7d, B7g, B7h, B7k, B8a, B8b, B8c, B8d, B8e, B8f, B8g, B9a, B9c, B9d, B10d, B10e, B10f, B10g, B10h, B10i, B10j, B10k, B10l, B10n, B10o, B11a, B11b, B11c, B11d, B11e, B13a, B13b, B14, B14b1, B14b2, B15a, B15c1, B15c2, B15f, B15i, B15j, B16b, B16g, B17b, B17e, B17f, B18a, B18b, B18c, B18d, B19, B20, B22a, B22b, B22c, B22d, B22e, B22f, B22g, B22h, B22i,

CATI TO INSERT TIME MARKER

SECTION C - COMPARISON WITH EXPECTATIONS

IF SAMPLE GROUP F

C1 - Overall, how did your experience of < VARIATION 3 > compare with your expectations? Were your expectations...? READ OUT – SINGLE CODE

Exceeded	1
Fully met.....	2
Met in the main.....	3
Partially met.....	4
Or, not met at all.....	5
(Don't know)	6
(Did not have any prior expectations).....	7

ASK IF SAMPLE GROUP F

C2c - And to what extent do you feel that it was made clear to you what you should expect in terms of... CATI TO DISPLAY QUESTION TEXT ABOVE STATEMENTS B & C AS WELL. ROTATE A, B & C

- (a) IF RECEIVED REPORT (CODE 1 AT S7a1): **The likely format and content of the final report**
- (b) IF RECEIVED REPORT (CODE 1 AT S7a1): **The time it would take for you to receive your OMIS report**
- (c) **The cost of using the OMIS service**

Please give me a score on a scale of 1 to 5, where 5 is 'very clear' and 1 is 'not at all clear'.

1 - Not at all clear.....	1
2	2
3	3
4	4
5 - Very clear	5
(Not given any indication as to what to expect)	6
(Don't know)	7

Measure B09 (Clear Information Rating)

- (Weighted) average proportion of firms providing a rating of '4' or '5' for extent to which it was made clear what to expect in terms of...
 - C2a – Format & content of the final report (50%)
 - C2b – Time it would take to receive report (25%)
 - C2c – Cost of using the OMIS service (25%)
- *B09 is based only on C2c(c) for those not receiving a report*

IF SAMPLE GROUP T1

C7a – Thinking specifically about the level of help and assistance that the staff at the overseas embassy or consulate provided in relation to this opportunity, how did this compare with your expectations? Were your expectations...?

READ OUT – SINGLE CODE

- Exceeded 1
- Fully met..... 2
- Met in the main 3
- Partially met..... 4
- Or, not met at all 5
- (Don't know) 6
- (Did not have any prior expectations)..... 7

IF EXPECTATIONS PARTIALLY/NOT MET (CODES 4-5 AT C7a)

C7b – Why were your expectations <IF C7a=4 only partially met / IF C7a=5 not met> in this respect? PROBE What were you hoping for that you did not receive? RECORD VERBATIM

.....
.....

IF SAMPLE GROUP AJ

C8 – Do you think that you will participate in any more UKTI webinars in future? SINGLE CODE. PROBE AS PER PRECODES

- Already have done..... 1
- Definitely will 2
- Probably will 3
- Probably will not 4
- Definitely will not..... 5
- (Don't know) 6

QUESTIONS DELETED FROM SECTION C:

- o C2a, C2b, C3, C4, C5a, C5b, C6a, C6b

CATI TO INSERT TIME MARKER

SECTION X – EXPORT EXPERIENCE & STRATEGY

READ OUT TO ALL

I'd like to move on to talking about the background to your business. <IF BASED OVERSEAS I believe you are based overseas, but please can you answer about your company in the UK.>

ASK ALL

S3 – Firstly, what is the main activity of your <IF BASED OVERSEAS UK> business?

.....

INTERVIEWER NOTE: Record the respondent's answer verbatim, but you only need to probe in enough detail so that responses can be coded into one of the following sectors:

- Agriculture, forestry or fishing
- Mining or quarrying
- Manufacturing
- Electricity or gas supply
- Water supply or waste management
- Construction
- Wholesale or retail
- Transport or storage
- Accommodation or foodservice
- Information & communication (ICT)
- Financial or insurance
- Real estate
- Professional, scientific or technical activities
- Administrative or support services
- Education
- Health or social work
- Arts, entertainment or recreation
- Other activities

CODING NOTE: RESPONSES TO BE CODED INTO SIC 2007 CODES AS FOLLOWS

A – Agriculture, forestry & fishing.....	1
B – Mining & quarrying.....	2
C – Manufacturing	3
D – Electricity, gas, steam & air conditioning supply	4
E – Water supply, sewerage, waste management & remediation activities	5
F – Construction	6
G – Wholesale & retail trade; Repair of motor vehicles & motorcycles	7
H – Transport & storage.....	8
I – Accommodation & food service activities	9
J – Information & communication.....	10
K – Financial & insurance activities.....	11
L – Real estate activities	12
M – Professional, scientific & technical activities.....	13
N – Administrative & support service activities.....	14
O – Public administration & defence; Compulsory social security	15
P – Education	16
Q – Human health & social work activities	17
R – Arts, entertainment & recreation.....	18
S – Other service activities	19
T – Activities of households as employers	20
U – Activities of extraterritorial organisations and bodies	21

S3c to be asked once a year (PIMS 37, PIMS 41, etc)**S3c – DELETED UNTIL PIMS 37**ASK ALL

S4 – How long ago was your business established <IF BASED OVERSEAS in the UK>? READ OUT AS NECESSARY. SINGLE CODE

AS NECESSARY:

- **This means when the business started trading**
- **If the business is a subsidiary this refers to the subsidiary in which you work**

Within the last year	1
Over 1, up to 2 years ago	2
Over 2, up to 3 years ago	3
Over 3, up to 4 years ago	4
Over 4, up to 5 years ago	5
Over 5, up to 10 years ago	6
Over 10, up to 20 years ago	7
Over 20 years ago	8
(Not yet trading)	9
(Don't know)	10
(Refused).....	11

ASK IF ESTABLISHED 1-2 YEARS (CODES 1-2 AT S4)

S4b – Can I just check, has your business actually started trading yet?

Yes	1
No	2
(Don't know)	3

ASK ALL EXCEPT NOT YET TRADING (I.E. DO NOT ASK IF CODE 9 AT S4 OR CODE 2 AT S4b)

S5a – And how long ago did your <IF BASED OVERSEAS UK> company start conducting business overseas, and by that I mean selling goods or services to either businesses or individuals based abroad? READ OUT AS NECESSARY. SINGLE CODE. CATI TO ONLY SHOW FEASIBLE CODES BASED ON S4

AS NECESSARY:

- **If the business is a subsidiary this refers to the UK subsidiary in which you work**
- **Please include any licensing deals with overseas companies**

Within the last year	1
Over 1, up to 2 years ago	2
Over 2, up to 3 years ago	3
Over 3, up to 4 years ago	4
Over 4, up to 5 years ago	5
Over 5, up to 10 years ago	6
Over 10, up to 20 years ago	7
Over 20 years ago	8
(Have not yet started exporting).....	9
(Don't know)	10
(Refused).....	11

IF NOT YET STARTED EXPORTING (CODE 9 AT S5a)

S5b – Have you actually attempted to win any overseas business within the last two years?

- Yes 1
 No..... 2
 (Don't know) 3

IF NOT YET STARTED EXPORTING OR NOT YET TRADING (CODE 9 AT S5a OR CODE 9 AT S4 OR CODE 2 AT S4b)

S5c – And do you anticipate conducting business overseas at all over the next 3 years? IF YES, PROBE FOR WHEN LIKELY TO START DOING BUSINESS OVERSEAS. SINGLE CODE

- Yes – within the next year 4
 Yes – in 1-2 years time 5
 Yes – in 2-3 years time 6
 No..... 7
 (Don't know) 8

IF ALREADY EXPORTING (S5a NOT CODE 9 & S4 NOT CODE 9 & S4b NOT CODE 2)

X1a – In the last year, approximately what percentage of your <IF BASED OVERSEAS UK company's> turnover was accounted for by overseas sales? RECORD PERCENTAGE

AS NECESSARY Please include any fees received from overseas companies or overseas licensing deals.

AS NECESSARY Please answer just for the UK part of your business.

- Write in (%) - CATI TO CHECK NUMBER IS BETWEEN 0 AND 100
 (Don't know)
 (Refused)

IF DON'T KNOW AT X1a

X1b – If you had to estimate this percentage, into which of the following bands would you put your business? READ OUT

- Up to 5% 1
 6 - 10% 2
 11 - 15% 3
 16 – 25% 4
 26 – 50% 5
 51 – 75% 6
 More than 75% 7
 (Don't know) 8
 (Refused)..... 9

IF ALREADY EXPORTING (S5a NOT CODE 9 & S4 NOT CODE9 & S4b NOT CODE 2)

X1e – In three years’ time do you think the percentage of your turnover that is accounted for by overseas sales will be higher than it is now, lower, or about the same? READ OUT

- | | |
|---------------------|---|
| Higher | 1 |
| Lower..... | 2 |
| About the same..... | 3 |
| (Don't know)..... | 4 |
| (Refused)..... | 5 |

ASK ALL EXCEPT NOT PLANNING TO EXPORT (I.E. DO NOT ASK IF CODE 7 AT S5c) & DO NOT ASK SAMPLE AJ

X22 – I’m going to read out some possible reasons for <IF S5a=1, 2 OR 9 OR S4=9 OR S4b=2 starting to sell overseas / IF S5a=3-8 OR 10-11 AND X1e=1 seeking to increase your overseas sales / IF S5a=3-8 OR 10-11 AND X1e=2-5 doing business overseas >, and I’d like you to tell me the extent to which each one applies to your business. Please give me a score of 1 to 5 where 5 means that you ‘agree strongly’ and 1 means that you ‘disagree strongly’. So firstly... ORDER OF STATEMENTS TO BE RANDOMISED BUT ALWAYS ASK H LAST

ON EACH OF THE X22 SCREENS SHOW (AT BOTTOM):
To what extent do you agree with that?

(a) You <IF S5a=1-2 started selling overseas / IF S5a=9 OR S4=9 OR S4b=2 are looking to start selling overseas / IF S5a=3-8 OR 10-11 AND X1e=1 are looking to increase your overseas sales / IF S5a=3-8 OR 10-11 AND X1e=2-5 sell overseas > to enable you to achieve a level of growth otherwise not possible

(b) You <IF S5a=1-2 started selling overseas / IF S5a=9 OR S4=9 OR S4b=2 are looking to start selling overseas / IF S5a=3-8 OR 10-11 AND X1e=1 are looking to increase your overseas sales / IF S5a=3-8 OR 10-11 AND X1e=2-5 sell overseas > because it allows you to more fully utilise your existing capacity

(e) You <IF S5a=1-2 started selling overseas / IF S5a=9 OR S4=9 OR S4b=2 are looking to start selling overseas / IF S5a=3-8 OR 10-11 AND X1e=1 are looking to increase your overseas sales / IF S5a=3-8 OR 10-11 AND X1e=2-5 sell overseas > to improve your firm’s profile or credibility

(g) You <IF S5a=1-2 started selling overseas / IF S5a=9 OR S4=9 OR S4b=2 are looking to start selling overseas / IF S5a=3-8 OR 10-11 AND X1e=1 are looking to increase your overseas sales / IF S5a=3-8 OR 10-11 AND X1e=2-5 sell overseas > because you <IF EXPORTING 2 YEARS OR LESS received / IF EXPORTING OVER 2 YEARS keep getting> orders or enquiries from overseas customers

(h) IF EXPORTING 2 YEARS OR LESS You <IF S5a=1-2 started selling overseas because you had / IF S5a=9 OR S4=9 OR S4b=2 are looking to start selling overseas because you have > personal connections overseas or a desire to travel abroad

- | | |
|-----------------------------|---|
| 1 – Disagree strongly | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 – Agree strongly | 5 |
| (Don't know) | 6 |

ASK ALL EXCEPT SAMPLE AJ

X26a – Moving on, has the London 2012 Olympics had, or will it have, any positive impact on your overseas business?

- Yes 1
 No 2
 (Had a negative impact on your overseas business) 3
 (Don't know) 4

ASK IF IMPACT ON BUSINESS (CODE 1 AT X26a)

X26b – Specifically, is this Olympic impact in terms of...? READ OUT. CODE ALL THAT APPLY.

- Additional sales from overseas markets..... 1
 More interest from overseas in doing business with UK firms 2
 More positive perceptions of the UK 3
 (Other) 4
 (Don't know) 5

IF SAMPLE GROUP F

X7 – Can I just check, was the information, advice or support you received in relation to < MARKET > through OMIS concerned with your ENTRY into this market, or were you already doing business there?

- Entry into this market 1
 Already doing business there..... 2
 (Don't know) 3

ASK IF SAMPLE GROUP F AND CODE 1 AT X7 (RECEIVED INFORMATION ABOUT ENTRY INTO MARKET) AND CODE 11 AT S7a (RECEIVED AN ANALYSIS OF THE MARKET IN QUESTION) AND CODE 1 AT S7a1 (RECEIVED REPORT)

X10g – Moving on to thinking about the market information you received through the OMIS report, how did the potential opportunities identified for your company in the report compare with what you had expected? Would you say the picture in the report was...? READ OUT

- More positive 1
 Less positive 2
 Or, about the same as you expected 3
 (Don't know) 4

QUESTIONS DELETED FROM SECTION X:

- S3b, X1c, X1d, X1f, X2, X2b, X2c, X3, X4a, X4b, X4c, X5, X6, X8, X9, X10, X10f, X11a, X11b, X12a, X12b, X12c, X13a, X13b, X14, X15, X16, X17a, X17b, X18a, X18b, X18c, X18d, X18e, X18f, X19, X20a, X20b, X20c, X20d, X20e, X20f, X20g, X21, X22c, X22d, X22f, X23, X24a, X24b, X25a, X25b, X25d, X25e, X25f, F19, F20

CATI TO INSERT TIME MARKER

SECTION D – IMPACTS & OUTCOMES

ASK IF SAMPLE GROUP AJ

D32 – I'd now like you to think about any actions you took as a result of participating in this webinar. Firstly, have you or will you do any of the following? READ OUT. CODE ALL THAT APPLY.

REMIND AS NECESSARY: **The webinar we're focussing on was called <'EVENT'>.**

Obtain copies of the presentations or recordings	1
Share the webinar information or key messages with colleagues	2
Make contact with other webinar participants or speakers	3
Seek out further information on the topic or market covered by the webinar	4
Obtain further support from UKTI as a result of attending this webinar	5
Anything else? (SPECIFY).....	95
(None of these).....	96
(Don't know)	97

ASK IF SAMPLE GROUP T1

S17b – Overall, roughly how many of the business opportunities on the UKTI website have you responded to in the last year? PROBE AS PER PRECODES

Just one.....	1
2	2
3-5	3
6-10.....	4
More than 10	5
(Don't know/Can't remember)	7

ASK IF SAMPLE GROUP T1

S17c – And do you think that you will respond to any more of the business opportunities published on the UKTI website in future? PROBE AS PER PRECODES

Yes	1
No	2
Maybe.....	3
(Don't know)	4

IF SAMPLE T1 & USED SERVICE MORE THAN ONCE (CODES 2-7 AT S17b)

I'm now going to ask some questions about the impact of using the business opportunities service on the UKTI website. From now on, please answer about all your experiences of using the business opportunities service over the last year, and not just in relation to the specific opportunity we were talking about earlier.

ASK ALL EXCEPT SAMPLE GROUP J2, K2, L2, I2, Y2, AF2, AH2

D2 – <IF N2 & NOT CODES 2-3 AT S39d Still thinking just about <N2 TEXT SUB>, > I'm now going to read out a list of possible ways in which your business may benefit from <VARIATION 4> <IF C, F, I, J, M, AF on this occasion / IF (T1 & S17b=2-7) OR K, L, Y OR AH over the last year>. Please tell me if you feel it is a benefit that you have experienced or expect to experience as a direct result.

IF SUPPORT RECEIVED WAS LESS THAN AN HOUR (CODE 2 AT S16c)

I understand that the support you received was fairly brief so if you do not expect any of these benefits to apply then please just answer no.

STATEMENTS TO BE RANDOMISED WITHIN GROUPS. ORDER OF GROUPS 1-3 TO BE RANDOMISED.

ON EACH OF THE D2 SCREENS ADD AFTER EACH STATEMENT AS NECESSARY- *'Is this a benefit you are expecting your business to experience as a direct result of <VARIATION 4> <IF I/J/AF on this occasion>?'*

GROUP 1 - BARRIERS TO MARKET ACCESS OVERCOME

<IF N2 & NOT CODES 2-3 AT S39d Still focussing just on <N2 TEXT SUB>

ASK ALL EXCEPT AJ

(a) Have you, or will you, gain access to prospective customers, business partners or other people that you would otherwise have been unable to meet (as a result of your <VARIATION 7>)?

ASK ALL

(c) Have you, or will you, improve your company's profile or credibility (as a result of your <VARIATION 7>)?

ASK ALL

(e) Have you, or will you, gain access to information that you would otherwise have been unable to come by (as a result of your <VARIATION 7>)?

ONLY ASK IF F, J, AH OR AJ

(f) Have you, or will you, overcome a particular problem or difficulty with a legal issue, regulations or quality standards (as a result of your <VARIATION 7>)?

GROUP 2 - INCREASED SKILLS

<IF N2 & NOT CODES 2-3 AT S39d Still focussing just on <N2 TEXT SUB>

ASK ALL EXCEPT B1, N1 & T1

(h) Have you, or will you, gain the confidence to either explore a new market or expand in an existing market (as a result of your <VARIATION 7>)?

ASK ALL

(i) Have you, or will you, improve your knowledge of the competitive environment in an overseas market (as a result of your <VARIATION 7>)?

ASK ALL EXCEPT T1 & AJ

(k) Have you, or will you, gain new ideas about products, services, techniques or technologies (as a result of your <VARIATION 7>)?

ONLY ASK M

(u) IF M Have you, or will you, improve your marketing research skills (as a result of your <VARIATION 7>)?

GROUP 3 - CHANGED BEHAVIOUR

CATI NOTE: GROUP 3 STATEMENTS NOT TO BE RANDOMISED, ASK IN THE ORDER SHOWN BELOW.

<IF N2 & NOT CODES 2-3 AT S39d **Still focussing just on** <N2 TEXT SUB>

ASK ALL EXCEPT T1 & AJ

(t) Have you, or will you, make improvements to your new product or service development strategy (as a result of your <VARIATION 7>)?

ASK ALL EXCEPT T1 & AJ

(l) Have you, or will you, introduce new products or services or improve any of your existing ones (as a result of your <VARIATION 7>)?

ASK ALL EXCEPT T1

(n) Have you, or will you, improve the way you do business in overseas markets (as a result of your <VARIATION 7>)?

ASK ALL

(o) Have you, or will you, improve your overseas marketing strategy (as a result of your <VARIATION 7>)?

FOR EACH THAT RESPONDENT AGREES IS A BENEFIT (ASK D3 DIRECTLY AFTER D2)

D3 - And to what extent do you feel that this has been, or will be, a benefit? Please give me a score of 1 to 5, where 5 means it will benefit your business to a critical extent and 1 means to no extent. READ OUT SCALE IN FULL ON FIRST OCCASION AND THEN EVERY 2-3 TIMES

1 – To no extent.....	1
2	2
3	3
4	4
5 -To a critical extent	5
(Don't know)	6

Measure A92 (Barriers To Market Access Overcome)

Proportion of firms providing a rating of '4' or '5' for...

- D2a – Gained access to prospective customers, partners, etc
- Or, D2e – Gained access to info otherwise unable to come by
- Or, D2c – Improved company's profile or credibility
- Or, D2f – Overcome problem with a legal/regulatory issue (F, J & AH only)

Measure A81 (Increased Skills)

Proportion of firms providing a rating of '4' or '5' for...

- D2i – Improved knowledge of competitive environment in overseas market
- Or D2k – Gained new ideas about products, services, etc
- Or D2o – Improved overseas marketing strategy
- Or D2u – Improved marketing research skills (M only)

Measure A83 (Changed Behaviour)

Proportion of firms providing a rating of '4' or '5' for...

- D2l – Introduced new products/services or improved existing ones
- Or D2t – Made improvements to new product/service development strategy
- Or D2n – Improved way do business in overseas market
- Or D2o – Improved overseas marketing strategy
- Or D2h – Gained confidence to explore new market/expand in existing market

Measure A04 (Increased Innovation)

Proportion of firms providing a rating of '4' or '5' for...

- D2l – Introduced new products/services or improved existing ones
- Or D2t – Made improvements to new product/service development strategy

Measure A93 (Improved Overseas Approach)

Proportion of firms providing a rating of '4' or '5' for...

- D2n – Improved way do business in overseas market
- Or D2o – Improved overseas marketing strategy
- Or D2h – Gained confidence to explore new market/expand in existing market

Measure A06 (Significant Business Benefit)

Proportion of firms scoring under...

- A92 – Barriers to Market Access Overcome
- Or A81 – Increased Skills
- Or A83 – Changed Behaviour

Additionality Adjustment

All of the above measures are adjusted for additionality as follows...

- *Do not score against measure if 'would have achieved similar results anyway' at D10*

ASK ALL EXCEPT SAMPLE GROUPS J2, K2, L2, I2, Y2, AF2, AH2, AJ OR IF NO (CODE 2) AT EVERY D2 STATEMENT ASKED, & ONLY ASK T1 IF S54f=1 OR S17b=2-7

D8a – As a result of < VARIATION 4 > have you, or do you expect to, increase your sales or win any new orders?

- Yes 1
- No 2
- (Don't know) 3

ASK IF EXPECT SALES/ORDERS (CODE 1 AT D8a)

D8d – And have you ALREADY won any contracts, orders or additional sales as a result of your < VARIATION 7 >?

AS NECESSARY: Please only answer yes if you have actually signed contracts, confirmed orders or already made new sales as a result.

- Yes 1
- No 2
- (Don't know) 3

ONLY ASK D8b IF D8a=2-3 & DO NOT ASK IF T1

D8b – As a result of < VARIATION 4 > have you, or do you expect to, be invited to tender or quote for any work?

- Yes 1
- No 2
- (Don't know) 3

ASK ALL EXCEPT SAMPLE GROUPS J2, K2, L2, I2, Y2, AF2, AH2 & DO NOT ASK IF NO (CODE 2) AT EVERY D2 STATEMENT ASKED

D10 – Thinking about all of the benefits you've just mentioned, which of the following best describes your view on the contribution < VARIATION 4 > has made to your firm, or is expected to make to your firm?

READ OUT EVERY CODE BEFORE ACCEPTING ANSWER. SINGLE CODE

- You would achieve similar results anyway 1
- You would achieve similar results, but not as quickly 2
- You would achieve some but not all of the results 3
- You probably would not achieve similar results 4
- You definitely would not achieve similar results 5
- (None of these) 6

ASK ANYONE SCORING 4-5 AT ANY D2/3 STATEMENT BUT DO NOT ASK IF NON-ADDITIONAL (CODE 1 AT D10) OR IF (SAMPLE GROUP O & E6c=1) OR IF SAMPLE GROUP T1 OR AJ

D25 – And as a direct result of your < VARIATION 7 > have you, or do you expect to, increase the number of people employed by your company, or safeguard any existing jobs? READ OUT AS NECESSARY

- Yes – increase number of people employed 1
- Yes – safeguard existing jobs 2
- Yes – both 3
- No 4
- (Don't know) 5

IF INCREASED NUMBER OF PEOPLE EMPLOYED (CODE 1 OR 3 AT D25)

D26a – How many more people are or will be employed by your company as a result of your <VARIATION 7>?

INTERVIEWER NOTE: If respondent asks what time period we're talking about, suggest the next 5 years.

- Write in number
- (Don't know)
- (Refused)

IF DON'T KNOW AT D26a

D26b – If you had to estimate, approximately how many more people are or will be employed by your company (as a result of your <VARIATION 7>)? READ OUT AS NECESSARY

- Zero 1
- One..... 2
- 2-4 3
- 5-9 4
- 10-19 5
- 20-49 6
- 50-99 7
- 100-199 8
- 200-249 9
- 250-499 10
- 500 or more 11
- (Don't know) 12
- (Refused)..... 13

IF SAFEGUARDED JOBS (CODE 2 OR 3 AT D25)

D27a – <IF CODE 3 AT D25 And >How many jobs have been or will be safeguarded as a result of your <VARIATION 7>?

- Write in number
- (Don't know)
- (Refused)

IF DON'T KNOW AT D27a

D27b – If you had to estimate, approximately how many jobs have been or will be safeguarded (as a result of your <VARIATION 7>)? READ OUT AS NECESSARY

Zero	1
One.....	2
2-4	3
5-9	4
10-19	5
20-49	6
50-99	7
100-199	8
200-249	9
250-499	10
500 or more	11
(Don't know)	12
(Refused).....	13

QUESTIONS DELETED FROM SECTION D:

- D1, D2b, D2d, D2g, D2j, D2m, D2p, D2q, D2r, D2s, D2v, D2w, D4a, D4b, D4c, D5, D6b, D6c, D6d, D8c, D9, D11, D12, D13, D14, D15, D16, D17, D18, D19, D20, D21, D22, D23, D24, D26, D28, D29, D30, D31, E29

CATI TO INSERT TIME MARKER

SECTION E – QUANTIFYING FINANCIAL IMPACT

ASK ALL (EXCEPT SAMPLE GROUP J2, K2, L2, I2, Y2, AF2, AH2 & AJ)

E6a – Moving on, approximately how much staff time would you say has been tied up < ADD IF SAMPLE GROUP E OR AD so far >...

IF ALL EXCEPT SAMPLE GROUPS B1 & N1 ..in your <VARIATION 7>< IF (T1 & CODES 2-7 AT S17b) OR K, L, Y OR AH over the last year>, in **days?**

IF SAMPLE GROUP B1 ..in your firm's participation in the < EVENT >, in **days?**

IF SAMPLE GROUP N1 ..in your firm's participation in this seminar, in **days?**

ADD IF NECESSARY

By this I mean the time specifically involved in <IF B1, B2, G1, G2, G5, N, O, R, S, X, Z, AE, AG, AI preparing for and attending the event / IF G4 OR P preparing for and attending this market visit / IF C, E, F, I, J, K, L, M, T1, Y, AD, AF, AH <VARIATION 4>>, but not any subsequent action you may have taken.

INTERVIEWER NOTE – USE DECIMALS IF NEEDED (E.G. ENTER 0.5 FOR HALF A DAY)

Write in number of days (MAY BE ZERO)
(Don't know)
(Refused)

IF DON'T KNOW AT E6a

E6b - If you had to estimate the number of days involved, into which of the following bands would you place it? READ OUT AS NECESSARY

Zero/none	1
Up to 1.....	2
2-5	3
6-10	4
11-20	5
21-50	6
51-100	7
101-500	8
More than 500	9
(Don't know)	10
(Refused).....	11

ASK ALL (EXCEPT SAMPLE GROUP J2, K2, L2, I2, Y2, AF2, AH2 & AJ)

E8 – Considering the anticipated financial gains to your business of your < VARIATION 7 >, would you say that the gains are expected to be greater than the costs, about the same as the costs or less than the costs?

AS NECESSARY: **When assessing costs, please take account of staff time as well as any direct expenditure.**

Greater than the costs	1
About the same as the costs	2
Less than the costs.....	3
(None apply)	4
(Don't know)	5

ASK ANYONE SCORING 4-5 AT ANY D2/3 STATEMENT BUT DO NOT ASK IF NON-ADDITIONAL (CODE 1 AT D10) OR IF (SAMPLE GROUP O & E6c=1) OR IF SAMPLE GROUP AJ

E9a – <IF N2 & NOT CODES 2-3 AT S39d Still thinking just about <N2 TEXT SUB>, > I would now like you to consider any financial gain to YOUR BUSINESS, in terms of additional profit, of your < VARIATION 7 >< IF (T1 & CODES 2-7 AT S17b) OR IF K, L, Y OR AH over the last year>. Please could you estimate what the financial gain will be in £. Please include benefits you expect to experience in the future, as long as they are a result of <VARIATION 4> <IF C, F, I, J, M, AF on this occasion / IF (T1 & S17b=2-7) OR K, L, Y OR AH over the last year>.

AS NECESSARY: **Please just give me your best estimate.**

AS NECESSARY: **It's fine to give me a figure in terms of additional turnover if this is easier than additional profit.**

Insert amount in £ (ALLOW ZERO)

(Don't know)

(Refused)

CATI TO VALIDATE AMOUNT ENTERED USING RANGES AT E9B

INTERVIEWER NOTE: If respondent asks what time period, say that ideally we want a total amount, but if it's easier they could think in terms of the next 5 years or next 10 years.

IF DON'T KNOW AT E9a

E9b – Which of the following do you think would be most applicable? READ OUT AS NECESSARY

Zero/nothing	1
Up to £500.....	2
£501 -£1,000	3
£1,001 -£2,000	4
£2,001 -£5,000	5
£5,001 -£10,000	6
£10,001 -£20,000	7
£20,001 -£50,000	8
£50,001 -£100,000	9
£100,001 -£500,000.....	10
£500,001 -£1million	11
£1million -£5million	12
More than £5million	13
(Don't know)	14
(Refused).....	15

ASK IF AMOUNT GIVEN AT E9a (IE. NOT ZERO), OR IF 2-13 AT E9b

E10 – Can I just check, is that figure of £ <CATI TO INSERT FROM E9a/E9b> the expected gain in terms of the increase to your profit, or the increase to your turnover?

Profit.....	1
Turnover	2
(Don't know)	3

ASK IF AMOUNT GIVEN AT E9a (IE. NOT ZERO), OR IF 2-13 AT E9b

E11 – Is that an annual or a total figure?

Annual figure 1
 Total amount 2
 (Don't know) 3

IF TOTAL AMOUNT AT E11 (CODE 2)

E12a – Over how many years would you expect this to be spread?

Write in (whole number of years)
 (Indefinitely)
 (Don't know)

ASK IF ANNUAL OR DON'T KNOW AT E11 (CODE 1 OR DK)

E13 – For how many years would you expect this to continue?

Write in (whole number of years)
 (Indefinitely)
 (Don't know)

ASK IF (NON-ZERO) AMOUNT GIVEN AT E9a/b

E14a – Thinking again about the earlier figure of £< INSERT FIGURE FROM E9a/E9b >, had you not < VARIATION 5 >, and taking into account any alternative action you may have taken instead of doing this, approximately what percentage of this financial gain would you expect to realise anyway? RECORD AS A PERCENTAGE

AS NECESSARY **Please just provide me with your best estimate.**

Write in (% -ALLOW ZERO)
 (Don't know)
 (Refused)
 CATI TO CHECK AMOUNT IS BETWEEN 0 AND 100

ASK IF DON'T KNOW AT E14a

E14b - If you had to estimate this proportion, into which of the following bands would it fall? READ OUT AS NECESSARY

Would have realised all of the financial benefit anyway (100%)1
 More than 80% of it2
 60%-80% of it3
 40%-60% of it4
 20%-40% of it5
 Less than 20% of it6
 Wouldn't have realised any of it without the support (0%)7
 (Don't know)8

ASK IF AMOUNT BETWEEN 0 AND 100 GIVEN AT E14a (BUT NOT IF 50)

E14c – So can I just confirm, had you NOT <VARIATION 5> you would have realised <CATI TO INSERT AMOUNT GIVEN AT E14a> % of the financial benefits anyway. Is that correct?

- Yes 1
- No - different amount 2
- (Don't know) 3

ASK IF NO CODE 2 AT E14c

E14d – So what proportion of this £< INSERT FIGURE FROM E9a/E9b > would you expect to realise had you not <VARIATION 5>? RECORD AS A PERCENTAGE

AS NECESSARY Please just provide me with your best estimate.

- Write in (% -ALLOW ZERO)
- (Don't know)
- (Refused)
- CATI TO CHECK AMOUNT IS BETWEEN 0 AND 100

Measure A49 (£ Estimated Additional Profit)

- Stage 1 – Firms estimate the expected financial benefit of the support (E9)
 - Firms not reporting any significant benefit in terms of 'Changed Behaviour (A83)' or 'Barriers Overcome (A92)' are counted as £0
- Stage 2 – Estimates converted to profit for those indicating the figure given was in terms of turnover (E10/E4)
- Stage 3 – Future expectations allowed for (using annual discounting rate of 8%) (E11-13)
- Stage 4 – Figures adjusted for additionality using the proportion of the financial benefit the firm 'would have realised anyway' (E14)

ASK ALL GIVING A POSITIVE BENEFIT AT E9a/b

E20 – Would you say that the estimates you've just provided on the financial benefits of < VARIATION 4 > have been...? READ OUT

- An accurate assessment 1
- A reasonable ball-park estimate 2
- Or are you either, not very confident of the accuracy 3
- Or, not at all confident of the accuracy 4
- (Don't know) 5

E35a-c only to be asked once a year (PIMS 35, 39, etc)ASK IF (NON-ZERO) AMOUNT GIVEN AT E9a/b

E35a – Thinking again about the additional £< INSERT FIGURE FROM E9a/E9b> <IF E10=1 profit / IF E10=2 turnover> that you expect to see as a result of <VARIATION 4>, will this come from...? READ OUT. SINGLE CODE.

- Additional sales to overseas customers 1
- Additional sales to UK customers 2
- Or a combination of these (i.e. UK and overseas customers)..... 3
- (None of these)..... 4
- (Don't know) 5

ASK IF BOTH OVERSEAS & UK SALES (CODE 3 AT E35a)

E35b - Approximately what percentage of the £< INSERT FIGURE FROM E9a/E9b> do you expect to come from additional sales to UK customers? RECORD AS A PERCENTAGE

AS NECESSARY **Please just provide me with your best estimate.**

- Write in (% - MUST BE BETWEEN 1% & 99%)
- (Don't know)
- (Refused)
- CATI TO CHECK AMOUNT IS BETWEEN 1 AND 99

ASK IF DON'T KNOW AT E35b

E35c - If you had to estimate this proportion, into which of the following bands would it fall? READ OUT AS NECESSARY

- More than 80% of it will come from sales to UK customers.....1
- 60%-80% of it2
- 40%-60% of it3
- 20%-40% of it4
- Or less than 20% of it will come from sales to UK customers.....5
- (Don't know)6
- (Refused).....7

ASK IF CODE 1 AT D8a OR CODE 1 AT D8b (BUT DO NOT ASK IF SAMPLE T1 OR AJ)

E21e – <IF N2 & NOT CODES 2-3 AT S39d Please can you still focus just on the <N2 TEXT SUB>, and not the wider event. > Thinking ahead, do you expect that in 5 years time your < VARIATION 7 > will have had any positive impact on your annual profit?

- Yes 1
- No 2
- (Don't know) 3

ASK IF CODE 1 AT E21e

E21c –Similarly, do you anticipate that in 5 years time it will have had any positive impact on your firm’s sales per employee (i.e. productivity)?

- Yes 1
- No 2
- (Don’t know) 3

Improved Business Performance Measure

Firms score against this measure if they...

- Expect that in 5 years time the support will have had a positive impact on their annual profit (E21e)
- And expect a positive impact on their sales per employee/productivity (E21c)
- And have or expect to increase sales/win new orders (D8a) or be invited to tender or quote for work (D8b)

CATI DIVIDE SAMPLE GROUP F INTO TWO GROUPS (GROUP 1 & GROUP 2) FOR ROTATION PURPOSES ON QUESTIONS E25a-d:

ASK IF F & GROUP 1

E25a - We understand that you paid <INSERT CHARGES FROM SAMPLE> for the OMIS service on this occasion. If this charge had been 25% higher would you still have gone ahead with it? PROBE AS PER PRECODES

- Yes - definitely 1
- Yes - probably 2
- Probably not 3
- Definitely not..... 4
- (Don’t know) 5

IF NOT ‘DEFINITELY NOT’ AT E25a.

E25b And if this charge had been 50% higher would you still have gone ahead with it? PROBE AS PER PRECODES

IF CODE 2 AT E25a DO NOT DISPLAY CODE 1 AT E25b

IF CODE 3 AT E25a DO NOT DISPLAY CODE 1 OR CODE 2 AT E25b

- Yes - definitely 1
- Yes - probably 2
- Probably not 3
- Definitely not..... 4
- (Don’t know) 5

ASK IF F & GROUP 2

E25c - We understand that you paid <INSERT CHARGES FROM SAMPLE> for the OMIS service on this occasion. If this charge had been 50% higher would you still have gone ahead with it? PROBE AS PER PRECODES

- Yes - definitely 1
- Yes - probably 2
- Probably not 3
- Definitely not..... 4
- (Don't know) 5

IF NOT 'YES - DEFINITELY' AT E25c.

E25d And if this charge had been 25% higher would you still have gone ahead with it? PROBE AS PER PRECODES

IF CODE 2 AT E25c DO NOT DISPLAY CODE 3 OR CODE 4 AT E25d

IF CODE 3 AT E25c DO NOT DISPLAY CODE 4 AT E25d

- Yes - definitely 1
- Yes - probably 2
- Probably not 3
- Definitely not..... 4
- (Don't know) 5

QUESTIONS DELETED FROM SECTION E:

- E4d, E4e, E4f, E4g, E4h, E4i, E4j, E5a, E5a1, E5a2, E5a3, E5b, E7a, E7a1, E7b, E10a, E10b, E12b, E12c, E15, E16, E17a, E17b, E17c, E18a, E18b, E18c, E19, E21a, E21b, E21d, E21e2, E21f, E22, E23, E24, E26, E27a, E27b, E27c, E27d, E27e, E27f, E28a, E28b, E28c, E28d, E29, E30a, E30b, E31, E32, E33, E34, F1b, F1d, F1e

CATI TO INSERT TIME MARKER

SECTION F – BUSINESS PROFILE

READ OUT TO ALL

I'd now like to ask you some questions about your business. These are just to classify your answers for analysis purposes. Please be assured your responses are confidential and UKTI can never identify individual companies.

ASK ALL EXCEPT 'NOT YET TRADING' (CODE 9 AT S4 OR CODE 2 AT S4b) & DO NOT ASK IF SAMPLE AJ

F1 - Which of these best describes the current status of your business? READ OUT – MULTICODE

SHOW IF OVERSEAS BASED

INTERVIEWER NOTE: If the respondent is based overseas, please ask them about the status of the overseas company where they work.

An independent business with no subsidiaries.....	1
A business with subsidiaries.....	2
Or, a subsidiary of another business.....	3
(A not for profit organisation)	4
(Other (SPECIFY)).....	95
(Don't know)	97
(Refused).....	98

IF CODES 1-3 AT F1

F1c – Can I just check, is the business UK or foreign-owned?

SHOW IF OVERSEAS BASED

INTERVIEWER NOTE: If the respondent is based overseas, please ask them about the ownership of the overseas company where they work.

UK-owned.....	1
Foreign-owned.....	2
(Joint UK and foreign-owned)	3
(Don't know)	4

TEXT IF CODE 3 AT F1 UNLESS OVERSEAS-BASED

From now on when I ask about your business I'd like you to answer just for the subsidiary in which you work.

ASK ALL EXCEPT NOT YET TRADING (CODE 9 AT S4 OR CODE 2 AT S4b) OR OVERSEAS-BASED

F2a – How many people are currently employed by your business within the UK?

AS NECESSARY Please include both full and part-time staff. Please only include UK based staff

INTERVIEWER NOTE – IF THE RESPONDENT OWNS THE COMPANY AND DOES NOT EMPLOY ANYONE ELSE, PLEASE CODE AS ZERO EMPLOYEES.

Write in number (0+):
 (Don't know) – PROMPT WITH RANGES
 (Refused)

SHOW IF ZERO ENTERED AT F2a

INTERVIEWER NOTE - PLEASE CONFIRM THAT THE FIRM HAS NO EMPLOYEES IN THE UK. IF THEY ARE UNSURE OR DON'T KNOW PLEASE CODE ACCORDINGLY RATHER THAN PUTTING ZERO

IF DON'T KNOW AT F2a

F2b – If you had to estimate, approximately how many people are employed by your business in the UK? READ OUT AS NECESSARY

INTERVIEWER NOTE – If the respondent owns the company and does not employ anyone else, please code as zero employees.

No employees.....	1
1-4	2
5-9	3
10-19	4
20-49	5
50-99	6
100-199	7
200-249	8
250-499	9
500 or more	10
(Don't know)	11
(Refused).....	12

IF F2a=250+ OR IF F2b=9-10

F2c – So can I just confirm that you have <INSERT RESPONSE FROM F2a/b> employees based in the UK?

Yes	1
No	2

IF NO, CATI TO ROUTE INTERVIEW BACK TO F2a & INTERVIEWER TO AMEND

ASK ALL EXCEPT NOT YET TRADING (CODE 9 AT S4 OR CODE 2 AT S4b) OR OVERSEAS-BASED

E1a – <IF NOT ESTABLISHED IN THE LAST YEAR (S4 NOT 1) Can I ask, what is the current annual turnover of your business? / IF ESTABLISHED IN LAST YEAR (S4=1) What do you anticipate will be the turnover of your business in the first year of trading?>

AS NECESSARY **By this I mean your annual sales, income or receipts.**

SHOW IF A SUBSIDIARY (CODE 3 AT F1)

AS NECESSARY **Please just give me the turnover of the subsidiary in which you work**

SHOW IF HAS SUBSIDIARIES (CODE 2 AT F1)

AS NECESSARY **Please give me the turnover for the UK part of your business, but including revenues from overseas sales made from the UK**

Write in amount in £ (£0+):
(Don't know) – PROMPT WITH RANGES
(Refused)

CATI TO VALIDATE AMOUNT ENTERED USING RANGES IN E1b

SHOW IF ZERO ENTERED AT E1a

INTERVIEWER NOTE - Please confirm that the firm has zero turnover in the UK. If they are unsure or don't know please code accordingly rather than putting zero

IF DON'T KNOW AT E1a

E1b - If you had to estimate your total turnover, into which of the following bands would you put yourself? READ OUT AS NECESSARY

£0	1
£100,000 or less	2
£100,001 - £500,000.....	3
£500,001 - £2million	4
£2million - £10million	5
£10million - £25million	6
£25million - £50million	7
£50million - £250million	8
£250million - £500million	12
More than £500million	9
(Don't know)	10
(Refused).....	11

ASK ALL UNLESS OVERSEAS-BASED & DO NOT ASK IF SAMPLE AJ

E4a – < IF NOT ESTABLISHED IN THE LAST YEAR (S4 NOT 1 & NOT 9 & S4b NOT 2) Is your company currently making an annual profit or loss / IF ESTABLISHED IN LAST YEAR (S4=1 OR S4=9 OR S4b=2) do you anticipate that your company will make a profit or loss in its first year of trading >?

SHOW IF NOT FOR PROFIT ORG (CODE 4 AT F1)

INTERVIEWER NOTE: IF A NOT FOR PROFIT COMPANY ASK RESPONDENT TO ANSWER FOR TRADING SURPLUS RATHER THAN PROFIT

Profit	1
Loss.....	2
(Break even)	3
(Don't know)	4
(Refused).....	5

IF PROFIT (CODE 1) AT E4a

E4b – Approximately what proportion of your < IF NOT ESTABLISHED IN THE LAST YEAR (S4 NOT 1 & NOT 9 & S4b NOT 2) annual turnover is / IF ESTABLISHED IN THE LAST YEAR (S4=1 OR S4=9 OR S4b=2) turnover in the first year of trading do you anticipate will be > accounted for by profits?

AS NECESSARY **By this I mean what is your profit margin?**
AS NECESSARY **Please answer in relation to pre-tax profit**

Write in (% - ALLOW ZERO)
(Don't know)
(Refused)

CATI TO CHECK NUMBER IS BETWEEN 0 AND 100

IF DON'T KNOW AT E4b

E4c - If you had to estimate this proportion, into which of the following bands would you place your business? READ OUT AS NECESSARY

Zero/nothing	1
Up to 10%.....	2
11% – 25%	3
26%-50%.....	4
51%-75%.....	5
More than 75%	6
(Don't know)	7
(Refused).....	8

CATI DIVIDE TOTAL SAMPLE INTO TWO GROUPS FOR ROTATION PURPOSES ON QUESTIONS F3, F3x, F3b, F4, E1c & F5

- SPLIT INTO GROUP1 AND GROUP2
- GROUP1 TO GET F3, F3x & F4 AND THEN E1c, F5 & F23b
- GROUP2 TO GET E1c, F5 & F23b FIRST, AND THEN F3, F3x & F4

ASK ALL EXCEPT NOT YET TRADING (CODE 9 AT S4 OR CODE 2 AT S4b) OR NO EMPLOYEES (0 AT F2A OR CODE 1 AT F2B) OR OVERSEAS-BASED OR SAMPLE AJ

F3 – Approximately how many of your UK-based employees are engaged wholly or partly in R&D or new product or service development activity? READ OUT AS NECESSARY. CATI TO ONLY SHOW FEASIBLE CODES BASED ON RESPONSE AT F2a/b

AS NECESSARY: **By 'R&D' I mean research & development**

Zero.....	1
One.....	2
2-4.....	3
5-9.....	4
10-49.....	5
50 or more	6
(Don't know)	12
(Refused).....	13

ASK IF F3 IS CODES 3-6

F3x – Can I just check, are any of these employees involved in activities that could be described as 'the development of scientific or technical knowledge that is not commonly available'?

Yes	1
No.....	2
(Don't know)	3

ASK ALL EXCEPT NOT YET TRADING (CODE 9 AT S4 OR CODE 2 AT S4b) OR OVERSEAS-BASED OR SAMPLE AJ

F4 – In the last year have you commissioned anyone external to your business to conduct any R&D or new product or service development activity for you?

AS NECESSARY: By ‘R&D’ I mean research & development

- Yes 1
- No..... 2
- (Don't know) 3

ASK ALL UNLESS ESTABLISHED IN LAST TWO YEARS (I.E. NOT 1-2 OR 9 AT S4 OR 2 AT S4b) OR OVERSEAS-BASED OR SAMPLE AJ

E1c – Have you introduced any new products or services over the last three years?

- Yes 1
- No..... 2
- (Don't know) 3

ASK IF YES AT E1c

F5 - And are these new products or services... READ OUT - SINGLE CODE

ADD AS NECESSARY: **By completely new I mean that, to the best of your knowledge, they have not been introduced by anyone before you**

- Just new to your business 1
- New to your industry or sector 2
- Or, are they completely new to the world 3
- (Some are just new to the business and some are completely new) ... 4
- (Don't know) 5

ASK ALL UNLESS OVERSEAS-BASED OR SAMPLE AJ

F23b –Have you either applied for or obtained any patents, trademarks or other legal protection for any of your products or services?

ADD AS NECESSARY: **Please answer yes if you have any patents, etc either in the UK or in overseas countries.**

- Yes 1
- No..... 2
- (Don't know) 3

Innovative Firms

- Have more than one employee engaged in R&D activity or new product or service development (F3)
- Or, have employed someone external to conduct R&D/new product or service development in the last year (F4)
- Or, introduced new products or services in the last 3 years (E1c) *except firms established in the last 2 years*

Innovative Firms – Alternative (Tighter) Definition

- Have more than one employee engaged in R&D activity or new product or service development (F3) and any employees are engaged in the 'development of scientific or technical knowledge that is not commonly available' (F3x)
- Or, have employed someone external to conduct R&D/new product or service development in the last year (F4)
- Or, introduced new products or services in the last 3 years (E1c) *except firms established in the last 2 years* and these products & services are either 'new to the world' or 'new to the industry/sector' (F5)

IP Active Firms

- Have applied for or obtained any patents, trademarks or other legal protection for their products or services (F23b)

ASK IF (CODE 1 AT D2i, D2k, D2l, D2t, OR D8a) AND (F3=2-6 OR F4=1) BUT DO NOT ASK IF SAMPLE T1 OR AJ OR IF NON-ADDITIONAL (CODE 1 AT D10)

F22a – <IF N2 & NOT CODES 2-3 AT S39d Again, please can you just focus on <N2 TEXT SUB> and not the wider event. > Has < VARIATION 4 > increased, or will it increase, the number of people engaged in, or the total time devoted to, R&D or new product or service development?

Yes 1
 No 3
 (Don't know)..... 4

ASK IF CODE 1 AT F22a

F22b – And has it increased, or will it increase, the amount you spend on R&D or new product or service development?

AS NECESSARY Please include expenditure on salaries, wages and staff time as well as equipment, and any expenditure on 'bought-in' product development services.

Yes 1
 No 3
 (Don't know)..... 4

Increased R&D

- Firms score against this measure if they have or expect to...
 - Increase the time spent R&D or NPD (F22a)
 - And increase the amount they spend on R&D or NPD (F22b)
- Adjusted for additionality, so firms do not score against the measure if 'would have achieved similar results anyway' (D10)

ASK ALL EXCEPT LESS THAN 1 YEAR OLD OR NOT YET TRADING (CODES 1 OR 9 AT S4 OR CODE 2 AT S4b) OR OVERSEAS-BASED

F7 - Thinking about your business as a whole, < IF OVER 5 YRS OLD (S4=6-8 OR 10-11) in the last FIVE years would you say that it has / IF 1-5 YRS OLD (S4=2-5) since it was established would you say that your business has>...? READ OUT

AS NECESSARY **This is just your overall impression of the growth of the business taking account of factors like size, number of employees, turnover and sales**

Remained the same size	1
Become smaller.....	2
Grown moderately	3
Or, grown substantially	4
(Don't know)	5
(Refused).....	6

ASK ALL EXCEPT NOT YET TRADING (CODE 9 AT S4 OR CODE 2 AT S4b) OR OVERSEAS-BASED

F8 – < ADD IF AT LEAST 1 YEAR OLD (NOT CODE 1 AT S4) And > what growth objectives do you have for the business over the next FIVE years? Do you plan to...? READ OUT

Remain the same size	1
Become smaller.....	2
Grow moderately	3
Or, grow substantially	4
(Don't know)	5
(Refused).....	6

ASK ALL UNLESS OVERSEAS-BASED OR SAMPLE AJ

F10 – Can I just check, do you have a current, written business plan?

Yes	1
No	2
(In progress/currently writing business plan)	5
(Don't know)	3
(Refused).....	4

IF HAVE OR WRITING PLAN (CODE 1 OR 5 AT F10)

F13 - <IF F10=1 Does / IF F10=5 Will> the plan contain any targets relating to revenues from overseas sales?

- Yes 1
 No 2
 (Don't know) 3
 (Refused)..... 4

ASK ALL CURRENTLY EXPORTING (S5a NOT CODE 9 & S4 NOT CODE 9 & S4b NOT CODE 2) BUT DO NOT ASK IF SAMPLE T1 OR AJ OR OVERSEAS-BASED
F25a – Does your firm use export credit insurance? SINGLE CODE

INTERVIEWER NOTE: If respondent does not know what export credit insurance is then code as 'no'

- Yes 1
 No..... 2
 (Don't know) 3

IF USE EXPORT CREDIT INSURANCE (CODE 1) AT F25a

F25b – And over the last 6 months, have you had any difficulties in obtaining export credit insurance? SINGLE CODE

- Yes 1
 No..... 2
 (Don't know) 3
 (Refused) 4

ASK ALL EXCEPT NOT YET TRADING (CODE 9 AT S4 OR CODE 2 AT S4b) OR OVERSEAS-BASED OR SAMPLE AJ

F15a - How many owners, partners or directors are there in day-to-day control of the business? (at this site) PROBE FOR BEST ESTIMATE

- Enter number
 (Don't know)
 (Refused)

IF ANY NUMBER GIVEN AT F15a (1+)

F15b – < IF 2+ AT F15a How many of these owners, partners, or directors / IF 1 AT F15a Does this person> have degree level or equivalent qualifications? PROBE FOR BEST ESTIMATE

IF F15a=1 SHOW:

INTERVIEWER NOTE: ENTER '1' IF YES OR '0' IF NO

- Enter number (ALLOW FOR ZERO)
 (Don't know)
 (Refused)

F15c-g only to be asked once a year (PIMS 37, 41, etc)

F15c, F15d, F15f, F15g – DELETED UNTIL PIMS 37

ASK ALL UNLESS OVERSEAS-BASED OR SAMPLE AJ

F27 – Finally, <IF I OR AE & S42=2 or 4: aside from the CBBC, / IF AF OR AG & S42=2 or 4: aside from the UKIBC, > does your firm belong to any of the following? READ OUT. CODE ALL THAT APPLY.

- The Chamber of Commerce 1
- Any trade associations or sector bodies..... 2
- Any other organisations representing business such
as the CBI or the Federation of Small Businesses 3
- None of these 4
- (Don't know) 5

ASK ALL

F16 – That's the end of the interview, thank you very much for taking part. Would you be willing to take part in any future UK Trade & Investment research about your <VARIATION 7>?

AS NECESSARY: If you say yes you are not obliged to take part and can always decline if it's not convenient at the time

- Yes 1
- No 2
- (Don't know) 3

ASK ALL

F16a – Are there any other comments you'd like to make about <VARIATION 3>, or any improvements you'd like to suggest? - MULTICODE

INTERVIEWER NOTE: Please record all comments, whether positive or negative.

- Yes (SPECIFY)..... 1
- No 2
- (Don't know) 3

IF YES AT F16a

F16b – INTERVIEWER: WOULD THIS RESPONDENT BENEFIT FROM THEIR COMMENTS BEING PASSED ON TO UKTI SO THAT THEY CAN FOLLOW-UP WITH THEM AND/OR RESOLVE ANY ISSUES?

Please note that UKTI will still see all the comments anyway but without the name of the firm making the comment. Only code yes if the respondent has a specific issue that they need UKTI to contact them about.

- Yes 1
- No 2

ASK IF YES AT F16b

F16c – Would you like me to pass on your contact details to UKTI, along with this comment, in case someone there would like to respond to you directly about it?

AS NECESSARY: The rest of your survey responses will still be treated confidentially, we will only pass UKTI your specific comment.

- Yes 1
- No 2

IF YES AT F16c

We will pass your comments to UKTI. In the meantime, I can give you the number of the main UKTI Helpline or the UKTI office in your region of the UK if you'd like to contact them? OFFER RELEVANT NUMBERS AS REQUIRED

IF 'REGION BUSINESS' IS NOT BLANK ON SAMPLE

INTERVIEWER NOTE: According to the sample data, this business is based in <REGION BUSINESS>.

Region	Team	Telephone
Main UKTI Helpline	UKTI	020 7215 8000
East Midlands	East Midlands International Trade Team	0845 052 4001
East of England	UKTI East of England	0845 641 9955
London	London International Trade Team	020 7234 3050
North East	North East International Trade Team	0845 05 05 054
North West	North West International Trade Team	0845 603 7053
South East	South East International Trade Team	08452 789 600
South West	UKTI South West	0845 60 60 969
West Midlands	West Midlands International Trade Team	0845 074 3515
Yorkshire & Humber	UKTI Yorkshire	0300 365 1000
Scotland	Scottish Development International	0800 917 9534
Wales	Business Wales	03000 6 03000
Northern Ireland	Invest NI	028 9023 9090

CATI TO INSERT TIME MARKER

ASK ALL

F17 – Finally as proof of this interview please could I just confirm your business postcode? CATI TO DISPLAY POSTCODE IF AVAILABLE – AMEND IF MISSING OR INCORRECT

.....

ASK ALL

F18 – And may I take a note of your name? CATI TO DISPLAY CONTACT NAME FROM SAMPLE – AMEND IF DIFFERENT PERSON OR INCORRECT

.....

ASK ALL

F30 – And can I confirm the best telephone number to contact you on? CATI TO DISPLAY NUMBER CALLED – AMEND IF DIFFERENT OR INCORRECT

AS NECESSARY: This is just in case we have any queries <IF F16=1 or so that we can contact you about any further UKTI research on this topic>.

ASK ALL

F29 – INTERVIEWER TO CODE GENDER OF RESPONDENT

Male.....	1
Female	2

STANDARD THANK & CLOSE

QUESTIONS DELETED FROM SECTION F:

- E1d, E1e, E2a, E2b, F6, F9a, F9b, F11, F12, F14, F15c, F21a, F21b, F21c, F21d, F21e, F22c, F23a, F23c, F26a, F26b, F28a, F28b, F28c

CATI TO INSERT TIME MARKER