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Welsh Government

RESEARCH, DOCUMENT

Export Cluster Programme feedback survey results (summary)

A small-scale research project which gathered feedback from businesses who participated in the Export Cluster Programme, a component of Welsh Government's Export Action Plan for Wales.

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The survey

In 2024, the Welsh Government's Export Team tasked colleagues in the Trade Analysis Team with undertaking a small-scale research project to gather feedback from businesses who have participated in the **Export Cluster Programme (2021 to 2024)** (<https://businesswales.gov.wales/export/supporting-your-export-journey/export-cluster-programme>). The aim of the research was to gather evidence to assess and better understand the effectiveness and impacts of the support provided to businesses via the Programme.

An online survey was developed to capture both quantitative and qualitative evidence. The Survey was distributed via email to all 215 business beneficiaries of the Programme in May and June 2024. A response rate of 36% was achieved. The Survey and analysis focused on businesses who had been members of the Programme for seven or more months (referred to as 'established members') as it was considered that businesses needed this time to engage meaningfully (these responses represented 31% of total membership).

Engagement and satisfaction with the programme

The results indicated broad satisfaction with the Programme, including positive initial perceptions from new members (participating for six months or less). Responses showed widespread satisfaction with Cluster Managers and the service provided by them, as well as with the delivery of events and advice.

Across all survey questions, less than five respondents reported dissatisfaction or issues/difficulties with the Programme and these were distributed across clusters (rather than concentrated in a single one). However, a substantial proportion of indifferent responses were provided to multiple different statements

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around satisfaction, impact and effectiveness. Comments from some respondents suggest that possible explanations for this were: limited engagement with the Programme to date and a time lag in the realisation of benefits as members embarked on longer-term strategies of export development.

The only barrier to participation for many respondents was their own resource constraints. This is important to consider when anticipating participation levels and planning future events, specifically their format and advance notice given. The hybrid approach to organising cluster events/activities currently delivered by some clusters is beneficial in seeking to both reduce burden on businesses while also allowing opportunities for face-to-face networking which were valued by some members.

Not all members agreed that other businesses within their cluster were useful to engage with. Related to this, the 'relevance of events and activities' was identified as a barrier to engagement with the Programme by just over two fifths of businesses. Balancing the specificity and differences in businesses' markets, products and export status/experience is therefore a key challenge and one that appeared relevant to all clusters.

The results revealed comparably different levels of engagement and satisfaction with different activities from members across the five individual clusters. The different perceptions shown by respondents of different clusters reinforces the need for the Export Team to consider the results on a cluster-by-cluster basis and use these to inform the needs and direction of each cluster individually. Separate analysis by cluster was out of scope for the purposes of this report. When broken down by Cluster, the response rate was insufficient for further analysis and could have been disclosive.

Outcomes of the programme

The Programme has most widely benefitted businesses in terms of confidence to export, with half of respondents reporting an increase. Almost two fifths of respondents reported that the Programme had supported them to identify new market opportunities and to improve their export strategies. Meanwhile around a fifth reported increased skills and capability to export as well as developing new commercial partnerships because of the Programme. Subsequent research, further down the line, would be better positioned to identify longer term outcomes and impacts, once businesses have had more time to realise the benefits of support.

Future monitoring

Going forward future versions of the Programme would benefit from more systematic implementation of evidence gathering. This should combine surveys and analysis of monitoring data with a schedule of qualitative data collection (including consultation with delivery partners) while minimising the burden on businesses. A strategically designed monitoring and evaluation framework should be implemented alongside any future versions of the Programme and in coordination with supporting Export Support programmes.

The Export Cluster Programme

The Export Cluster Programme (2021 to 2024) is a key component of the Welsh Government's Export Action Plan for Wales. The Export Cluster Programme (hereafter referenced as 'the Programme') is focused on supporting and developing an increase in the export performance of companies based within

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five priority export sectors for Wales – Renewables and Clean Energy, Consumer Products, High-value Manufacturing, MedTech and Diagnostics and Technology. The Programme provides cluster members with a combination of one-to-many and one-to-one support designed specifically to enhance their export capacity and capabilities as well as the opportunity to collaborate with other members to create networks, niche groups and peer-to-peer mentoring support.

Delivery of the Programme was contracted out to three suppliers (delivery partners) from October 2021 for three years with the option of a fourth year extension to end of October 2025. The Survey feedback played an important part in the overall decision to take up the extension into a fourth year.

Contact details

Researcher: Mair Smith

Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government.

For further information please contact:

Mair Smith

Email: stats.trade@gov.wales (<https://www.gov.walesmailto:stats.trade@gov.wales>)

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