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Welsh Government export support programmes: impact evaluation

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Welsh Government export support programmes:
impact evaluation

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Glossary

ACCA
Association of Chartered Certified Accountants
ABHI
The Association of British HealthTech Industries
AGP
Accelerated Growth Programme
AMRC
Advanced Manufacturing Research Centre
BCR
Benefit Cost Ratio
CBAM
Carbon Border Adjustment Mechanism
CBI
Confederation of British Industry
CBS
Cost per Business Supported
CPD
Cost per Project Delivered
CRN
Company Registration Numbers
DBT
Department for Business and Trade
EEN
Enterprise Europe Network
EMEA
Europe, Middle East, and Africa
ExAP
Export Action Plan
FAME
Financial Analysis Made Easy
FSB
Federation of Small Businesses
GPSR
General Product Safety Regulations
IDBR
Inter-Departmental Business Register
IM4H
International Manager for Hire
IoD
Institute of Directors
IoE
Chartered Institute of Export and International Trade
ITA
International Trade Advisor
ITD
International Trade Development
ITO
International Trade Opportunities
OBDV
Overseas Business Development Visits

OVE
Overseas Visits and Exhibitions
R&D
Research and Development
UKIE
UK Interactive Entertainment
UKTI
UK Trade and Invest (now DBT)
VfM
Value for Money
WG
Welsh Government

1. Introduction and background

1.1. Wales' export profile

Growth of exports in Wales is a central part the Welsh Government's overall strategy of enhancing the country's global presence and economic prosperity. This is in alignment with flagship policies and strategies, such as the Programme for Government,[footnote 1] the International Strategy for Wales,[footnote 2] Economic Mission, [footnote 3] and the Wellbeing of Future Generations Act[footnote 4], which seek to raise Wales' international profile as a globally responsible nation and a place of creativity, sustainability and technology.

The importance of exports for the Welsh economy is reflected in the latest data (ONS, 2023), which indicates that the combined value of Welsh exports of goods and services was equivalent to 34% of GDP, higher than any other UK nation. [footnote 5 and 6]

However, in recent years exporting from Wales has also faced significant challenges, including the United Kingdom's exit from the European Union (hereafter referred to as EU-Exit), the Covid-19 pandemic, international conflicts and fluctuating inflation. Furthermore, the latest provisional HMRC data for the year ending June 2025 indicates that the value of goods exports from Wales (to both EU and non-EU countries) was down £1.5bn (8.2%) compared to the year ending June 2024. Excluding oil, the decrease was £0.9bn (3.1%).[footnote 7] In this context, although government intervention in support of a country's export sector cannot be expected to fully compensate for macroeconomic changes and volatility, Welsh Government (WG) export support programmes are of considerable value in providing opportunities and building confidence, enabling businesses to overcome identified exporting challenges in particular market situations.

1.2. Rationale for the evaluation

In December 2023, the WG commissioned Miller Research (UK) Ltd to undertake an external evaluation of its core export support programmes. The evaluation was organised into two stages, with the first undertaking a process evaluation and the second an impact evaluation. This report sets out the results of the impact evaluation (further information regarding the methodology, findings and early indications from the process evaluation can be found in Annex B).

The aim of the impact evaluation was to collect primary data to assess the impact and overall effectiveness of the core export support programmes through answering the following research questions, as outlined in the specification:

1 Programme for government | GOV.WALES
2 Welsh Government International Strategy
3 Economic mission: priorities for a stronger economy [HTML] | GOV.WALES
4 The Well-being of Future Generations (Wales) Act 2015
5 Regional gross domestic product: all ITL regions - Office for National Statistics
6 For England, Scotland and Northern Ireland, exports of goods and services were equivalent to 30.1%, 32.9% and 30.1% of GDP respectively.
7 Welsh international goods trade: July 2024 to June 2025 (headline data) | GOV.WALES

- what impact have the programmes had on **individual businesses' exporting journeys**, and to what extent can these be attributed as 'net' impacts of WG export support?
- what **non-financial outcomes** of WG export support programmes can be identified and measured (e.g. internal changes to business structure and recruitment strategy to enhance export potential; changes to and expansion of export products; business perceptions of programme 'success')?
- what level of **satisfaction do participating businesses express** on receipt of WG export support?

The methodological approach adopted to answer these questions is outlined in Chapter 2.

1.3. Programme overview

The Export Action Plan[footnote 8] (hereafter referred to as the ExAP) was published in December 2020, as part of the Welsh Government's International Strategy. [footnote9]. It aims to consolidate and streamline the diverse range of services offered by the Welsh Government, some of which have been provided since 2011-12, to support new and existing export businesses in Wales, as well as introduce a series of new export support initiatives.

The ExAP includes a variety of export support programmes and initiatives that seek to provide a comprehensive range of support, guidance, and advice to Wales-based businesses at different stages of their export journeys (delivered on a bespoke one-to-one basis, and through one-to-many activity). These programmes deliver support aligned with the 5 strategic pillars of the ExAP:

Inspiring exports

This pillar aims to foster a strong culture of exporting and international engagement among Welsh businesses, with the goal of increasing the number that export regularly and sustainably. There is a particular focus on new exporters, those with either high growth - or untapped - export potential, as well as encouraging established exporters to expand into overseas markets.

Building capability

With lack of time and capacity identified as a major barrier to businesses exporting, the Plan outlines the importance of building the capacity and capability of businesses (especially those entering new markets and with untapped export potential), with a focus on developing their knowledge and skills.

[8] Welsh Government International action plans | GOV.WALES
[9] Welsh Government International Strategy

Finding customers

Finding the right contacts in overseas markets is a common barrier to entering new export markets, especially for SMEs. As such, the Plan outlines actions that will support businesses to identify potential partners/customers in market, particularly those which are established exporters or have untapped export potential.

Getting to market

Attendance at targeted international trade exhibitions and trade development missions has been identified as an important component of growing exports and improving the competitiveness of businesses in Wales, alongside raising Wales' profile as a location for quality production and inward investment.

Working with others

To achieve these ambitious goals, there is a reliance on support from other organisations in the export support ecosystem to ensure a comprehensive offering to businesses. This entails fostering and strengthening existing networks of contacts both within Wales and across the UK.

The ExAP programmes and initiatives that are within and beyond the scope of this evaluation are set out in Table 1.1 and Table 1.2 respectively.

Table 1.1: ExAP programmes by mode of delivery and inclusion in the evaluation

Programme	One-to-One support	One-to-Many support	Online	Fully Funded by WG	Cost to WG per Company (average)	2024-25 Funding [footnote 10]	ExAP Pillar
International Trade Development (ITD)	✓			✓	£7,600	£300,000	Building Capability, Inspiring Exports
International Trade Opportunities (ITO)	✓				£7,864	£415,000	Finding Customers
Overseas Business Development Visits (OBDV)	✓				£3,962	£530,000	Finding Customers / Getting to Market
Overseas Trade Missions & Exhibitions		✓			Up to 50% of costs	£1.5 million	Finding Customers / Getting to Market

Source: WG Export Team data, 2025

Table 1.2: ExAP programmes by mode of delivery not included in the evaluation

Programme	One-to-One support	One-to-Many support	Online	Fully Funded by WG	Cost to WG per Company (average)	2024-2025 Funding	ExAP Pillar
Export Training Grant					£2,204	50% funding comes from the skills department	Building Capability
Export Cluster Programme		✓		✓	Fully funded	£500,000	Building Capability
New Exporter Programme	✓	✓		✓	Fully funded	£120,000	Inspiring Exports
In-Wales Events		✓		✓	Fully funded	£150,000	Inspiring Exports, Working with Others
Export Hub		✓	✓	✓	Fully funded	£125,000	Building Capability, Finding Customers
Export Zone (webpages/online export training modules)			✓	✓	Fully funded	Variable	Building Capability

Source: WG Export Team data, 2025

[10] It is important to note that these figures are indicative and do not reflect the flexibility that exists within the budget. As such, they are subject to change. This also applies to the funding figures in Table 1.2.

Within the suite of services offered to businesses, the ExAP encompasses 4 core export support programmes, which form the focus of this evaluation (as outlined in Table 1.1). As noted above, these programmes were included within the scope of this evaluation as they constitute a significant proportion of the overall export support budget and are the most resource intensive to deliver.

The programmes are accessed through a dedicated team of WG International Trade Advisors (ITAs), who form part of the WG Export Team. Although the ITA team is not a focus of this evaluation, it plays a significant role in providing tailored advice and support to Welsh businesses in their international trade efforts. ITAs perform this role through assessing a business's suitability for support through the core export support programmes and can also refer businesses to support available beyond the Welsh Government, such as that provided by the UK Government and Chamber of Commerce organisations. It is important therefore to acknowledge the ITA team as a critical component of the overall delivery of WG export support.

1.3.1. The International Trade Development (ITD) Programme

The ITD programme is aligned with the pillars of **Building Capability** and **Inspiring Exports**. It serves as a comprehensive research tool that evaluates a business's readiness to enter new markets. This programme supports businesses in developing an export strategy, selecting optimal markets, and determining effective market entry methods. The programme also assists with navigating financial matters such as pricing, payments and taxes, and provides guidance on export procedures, regulations and logistics. For the financial year 2023-24, 35 ITD projects were successfully completed. The programme is fully funded by the Welsh Government, with an approximate cost of £7,600 per project. It connects businesses with export experts through a rotation system among 4 suppliers to deliver tailored consultant support. The programme aims to enhance exporting strategy development, market research, and operational logistics.

1.3.2. The International Trade Opportunities (ITO) Programme

The ITO programme aligns with the **Finding Customers** pillar and is designed to assist businesses in navigating the complexities of the global market by identifying potential market opportunities, clients, and customers. With an approximate cost of £7,900 per project for participation, businesses are required to contribute £500, or £750 if they opt for the additional support of an in-market consultant (a subcontractor) to join them in meetings. In return, the ITO provides access to business consultants across major trading regions worldwide, detailed business information at the local level, advice on local trading conditions and regulations, assistance in identifying and contacting potential customers, agents and distributors, and organising face-to-face meetings with interested parties. In the 2023-24 financial year, 57 ITO projects were completed, showing its effectiveness in assisting businesses to expand internationally.

1.3.3. The Overseas Business Development Visits (OBDV) grant

The Overseas Business Development Visit (OBDV) grants align with the **Finding Customers** and **Getting to Market** pillar and are a highly sought-after programme that offers match funding of up to £10,000. The OBDV seeks to support businesses by providing them with financial support towards undertaking independent visits to overseas markets and/or exhibiting at major overseas trade shows and exhibitions. This programme operates on a mutual value exchange basis, where businesses are expected to report export wins and demonstrate clear international growth opportunities. Applications for OBDV support are assessed based on the potential return on investment of export opportunities, amongst other criteria. The funding assists in supporting part of the costs of elements such as flights, accommodation, and exhibition fees, facilitating businesses' participation in trade fairs, exhibitions, and conferences. Businesses can receive support for up to 3 visits in any given financial year. In the 2023-24 period, 145 OBDV projects were delivered.

1.3.4. Trade Missions and Exhibitions (OVE)

Trade Missions and Exhibitions are also a core component of the **Getting to Market** and **Finding Customers** pillars, with a schedule of annual overseas trade events providing opportunities for businesses to attend or exhibit at important trade shows and visit a range of target markets as part of a supported WG trade mission delegation. (A list of event opportunities is available on the Business Wales exporting website.[footnote11]) Businesses can apply to participate, with WG support covering up to 50% of the costs. These missions facilitate business introductions and networking opportunities, often in collaboration with WG overseas teams and/or DBT overseas networks (Embassies/Consulates). Businesses can also engage with the ITO programme in advance of their participation in the trade mission/exhibition for additional in-depth market insights, and to arrange meetings with potential customers. Exhibitions provide a significant platform for Welsh businesses to showcase their products globally, with dedicated WG support including a branded 'Cymru/Wales' pavilion, individual business pods, and meeting spaces. This approach greatly enhances the international visibility of Welsh businesses and raises the profile of Wales internationally.

1.4. Evolution of support

As indicated by Table 1.3 below, the uptake of core export support programmes on offer to businesses has fluctuated in the period 2017-18 to 2024-25. Programmes such as ITD and OVE currently support fewer businesses than they did in 2017-18, despite both experiencing increases in some of the interim years. ITO supported more businesses in 2024-25 than in 2017-18, but the number of businesses supported has substantially fallen from its peak in 2022-23. In contrast, more businesses received support through OBDV in the most recent financial year, when compared to any other year within the evaluation timeframe.

The impact of the Covid-19 pandemic is evident, with 2020-21 marking a substantial drop off in businesses supported across all programmes, most notably in relation to OBDVs where only 3 engaged in comparison to 85 the previous year. This is unsurprising given the restrictions on international travel during this time.

[11] Business Wales export support

Table 1.3: Number of businesses supported by programmes [footnote12]

Financial Year	ITD	ITO	OBDV	OVE	Total Businesses supported
2017-18	47	22	96	156	
2018-19	60	31	106	184	
2019-20	47	36	85	123	
2020-21	26	17	3	102	
2021-22	34	21	25	100	
2022-23	40	51	89	118	
2023-24	29	41	90	143	
2024-25	32	30	130	145	
Total	251	196	349	582	1,378

Source: WG Export Team data, 2025

When analysing the support provided through the core export support programmes, it is important to differentiate between the number of businesses supported and the number of projects completed, as businesses frequently engage in more than 1 programme of support.

As shown in Table 1.4 below, the number of projects delivered on a yearly basis across the 4 programmes is either the same as or higher than the number of businesses supported. It can be inferred from the data that a business, on average, received 3 instances of core programme support over the evaluation period.

Once again, the impact of Covid-19 is evident in the data for 2020-21, with substantially fewer projects delivered or supported when compared to the previous year. It is also evident that projects delivered through the ITD and OVE programmes are yet to attain pre-pandemic levels.

This trend is also reflected in the number of projects completed, with ITO and OBDV projects experiencing the largest increase when compared to 2017- 2018. The total number of projects completed through the ITD programme in the most recent financial year stands at 60% of 2017-2018 levels.

[12] For clarification, the figures in each individual column do not sum to the respective total figures presented on the bottom row of each column as some businesses have received several tranches of support across the time period in scope. These have not been ‘double counted’ so as to avoid misrepresentation / duplication.

Table 1.4: Number of projects delivered by programme

Financial Year	ITD	ITO	OBDV	OVE	Total Projects
2017-18	52	26	128	211	417
2018-19	81	40	146	277	544
2019-20	52	44	116	162	374
2020-21	36	21	3	141	201
2021-22	42	36	31	139	248
2022-23	49	66	124	151	390
2023-24	35	57	145	177	414
2024-25	31	34	161	160	386
Total	374	320	853	1382	2929

Source: WG Export Team data, 2025

1.5. Report structure

The remainder of the report is structured as follows:

- Chapter 3 presents the findings from qualitative interviews with internal and external stakeholders [footnote13]
- Chapter 4 presents the analysis of survey responses from beneficiaries [footnote14] who have received core programme support from the WG
- Chapter 5 sets out in-depth insights from qualitative interviews with beneficiaries of WG export support
- Chapter 6 provides an overview of survey responses from non-beneficiaries (businesses who had not received any support from the WG during the 2017-2024 evaluation period). The chapter offers indicative insights into unmet needs and allows for tentative comparisons with beneficiary responses that suggest potential relationships between export support and business outcomes worthy of further exploration
- Chapter 7 outlines the findings from the perceived additionality assessment, detailing what programme outcomes beneficiaries consider may have occurred in the absence of WG support. The chapter also addresses the analytical challenges of attributing

[13] External stakeholders interviewed as part of this evaluation included representatives from organisations who offer some form of export support, such as Chambers of Commerce and the Department of Business and Trade (DBT).

[14] In this evaluation, 'beneficiaries' refers to businesses who have engaged with / experienced support from one of the WG's four core export support programmes in scope of this evaluation.

outcomes to programme participation, and the need for further analysis in the form of a value for money assessment, aligned with HM Treasury Green Book principles

- Chapter 8 sets out the conclusions and final thoughts
- Chapter 9 details the recommendations stemming from the evaluation findings
- Chapter 10 catalogues all annexes cited throughout the report, including case studies, links to survey questions and a summary of the process evaluation

2. Methodology

2.1. Introduction

The aim of this evaluation is to assess the impact of the Welsh Government's core export support programmes on businesses that received support (beneficiaries), compared with those that did not (non-beneficiaries), and to evaluate the overall effectiveness of these programmes in achieving their intended outcomes. A mixed-methods approach was employed, integrating quantitative surveys and qualitative interviews, to provide a comprehensive understanding of programme outcomes.

2.2. Statistical reporting conventions

Throughout the report, percentages are typically presented in the main text, with absolute frequencies shown in brackets. Where relevant to understanding the size of the response base, especially in cases without an accompanying figure, the total number of responses (n) has been included. This ensures transparency in interpreting percentages and allows for direct alignment with data presented in visual summaries. This approach was adopted to strike a balance between clarity and analytical rigour across beneficiary and non-beneficiary datasets.

2.3. Data collection

For the impact evaluation, data was collected through 2 surveys, a series of semi-structured interviews, and case studies. The surveys aimed to gather quantitative data on export turnover and business characteristics, while the interviews and case studies provided a deeper understanding of how businesses experienced the support and its effect on their export activities.

2.3.1. Beneficiary survey

The beneficiary survey was distributed to 760 beneficiary businesses using SmartSurvey. A total of 196 businesses were removed from the initial sample (further detail is provided in Chapter 4: Welsh Government beneficiary survey responses). Following these adjustments, the final sample size was reduced to 564 businesses, with 149 responses in English and 5 in Welsh, resulting in a 27.3% response rate. An additional 160 partial responses were received; however, these were classified as non-responses and excluded from the final analysis.

The survey aimed to gather data on key metrics such as export turnover during the period from 2017 to 2024, as well as business characteristics such as sector, size, and export history. Additionally, questions were included to capture the types and frequency of support received and how businesses perceived the programmes' effectiveness. This allowed the assessment of both quantitative outcomes (such as changes in export turnover) and qualitative insights about the perceived usefulness of the support provided. The survey topic guide has been included in Annex C.

2.3.2. Non-beneficiary survey

A second survey adopted a 'push-to-web' approach, in which hardcopy letters were sent to directors of Wales-based non-beneficiary businesses, identified as 'exporters' through secondary data sources.[footnote15] This letter directed recipients to the survey via an online link. A total of 6 businesses were removed from the initial contact list (this is explained in detail in Chapter 6: non-beneficiary survey responses). Following these adjustments, the final sample size included 2,022 businesses, with 110 responses in English and 1 in Welsh, resulting in a 5.5% response rate.

This survey aimed to gather similar data on export turnover, business characteristics, and challenges in export growth. While not designed as a formal control group, the responses to this survey provided a comparison group allowing a tentative exploration of differences in export performance between those who received WG support and those who did not. A robust counterfactual assessment was not possible within the confines of this project, partly due to the retrospective nature of the evaluation and the challenges in defining a comparison group. However, such analysis - while methodologically complex – would be recommended.

The full methodology adopted for the non-beneficiary survey is outlined in Chapter 6.

2.3.3. Qualitative interviews

In addition to the surveys, a series of semi-structured interviews were conducted to generate qualitative insights across 3 groups of respondents. These included: internal stakeholders (WG ITAs), external stakeholders (representatives from the wider export support ecosystem), and beneficiary businesses.

In total, 3 interviews were conducted with internal stakeholders. A further 5 semi-structured interviews were carried out virtually via Microsoft Teams with external stakeholders from organisations that offer support to Welsh businesses. This included representatives from: the DBT, Chambers of Commerce organisations, Association of Chartered Certified Accountants (ACCA), Federation of Small Businesses (FSB), and the WG – team of Smart Innovation specialists. 17 semi-structured interviews were completed with businesses who provided their contact details in the beneficiary survey.

2.3.4. Analysis approach

Qualitative interview and survey data were analysed systematically using thematic coding to identify important trends and patterns in business experiences. A mind mapping software tool was used to organise, categorise, and visually map recurring themes, allowing for a structured approach to identifying commonalities in the perceived challenges and benefits of receiving WG export support. This method enabled a comprehensive synthesis of qualitative insights while preserving the nuances of individual business experiences.

[15] This involved use of the UK Government's Find UK Traders and Companies House portals, in combination with the commercial business database, FAME.

2.3.5. Perceived additionality assessment

In addition to the survey and interview analysis, an assessment of what beneficiary businesses would have done in the absence of WG export support was undertaken. Beneficiaries were asked whether they would have pursued export activities without the programme and where they would have sought alternative support. This helped assess the programmes' perceived additionality and whether they addressed gaps in existing business support structures.

2.3.6. Case studies

The case studies were designed to provide detailed insights into the experiences of businesses that received WG export support. A structured sampling approach based on a cluster analysis of supported businesses was used to ensure representation across a range of business characteristics, including business size (micro, small, medium, and large), geographical regions, industry sectors, and the frequency and period of accessing WG support. An initial pool of 12 businesses was identified, from which 5 were selected based on availability and willingness to participate. While the selection aimed for a balanced representation, practical constraints meant that some sectoral and size distributions varied from the ideal. Despite this, the final case studies—Haia Communications, Dulas Ltd, Frontier Medical Group, Triumph, and Brain Box—offer a diverse range of perspectives on how WG export support has influenced business growth and international expansion. Further details on the selection process are provided in Annex A.

2.3.7. Presentation of findings

At an advanced stage of the report writing process, Miller Research presented draft report materials to WG officials. This included discussion of the recommendations, which were sense-checked for feasibility and alignment with ongoing initiatives that may not have been fully visible in the evaluation process. The insights generated by these discussions were used to inform the final stages of report preparation.

2.3.8. Data limitations

As with any mixed-methods evaluation, several limitations should be considered when interpreting the findings. Firstly, in terms of qualitative interviews with businesses, some individuals only had limited recollection of the support they had received from the Welsh Government. In addition, others who engaged had only recently joined the business and thus had limited knowledge of prior support received. In a few cases, some of the feedback from businesses indicated areas of misunderstanding regarding what WG export support programmes offer, with examples of requests for types of support that are already on offer, indicating possible confusion about the remit and scope of programmes. In addition, several requests extended beyond the devolved powers of the Welsh Government, limiting their relevance to the evaluation.

In relation to the quantitative surveys, all turnover and export sales data provided by businesses was self-reported and has been taken at face value. While this is standard practice in many business support evaluations, it does mean that the financial data cannot be independently verified and should be interpreted with caution.

There was also variation in response rates, sample sizes and sample composition between the beneficiary and non-beneficiary surveys. While the analysis sought to account for this imbalance (e.g., through qualitative triangulation), it introduced a level of uncertainty into cross-group comparisons.

Taken together, while these limitations do not undermine the overall validity of the evaluation, they do highlight the need for cautious interpretation, particularly when assessing attribution, causality, and financial impact.

3. Qualitative interviews with internal and external stakeholders

Chapter 3 summary

As set out in Chapter 2, 8 semi-structured interviews with stakeholder were conducted for the research, including 3 with internal stakeholders and 5 with external stakeholders. This chapter is based on analysis of the results of these interviews.

Effectiveness of export support
Stakeholders agreed that WG export support plays a vital role in helping Welsh businesses access international markets. Among these, 6 stakeholders praised the Trade Missions, OBDVs, and the ITD programmes for facilitating market entry and reducing the financial risks of exporting. OBDVs were valued for their cost-effectiveness and accessibility. The ITO programme received more mixed feedback. The 3 internal stakeholders noted that some businesses found the outcomes underwhelming, particularly when overseas meetings failed to materialise or lacked value. These concerns were considered isolated and mainly during the virtual delivery of the programme.

Engagement and awareness
- All 3 internal stakeholders highlighted the positive role of initiatives such as the Explore Export Wales events; these events were viewed as major entry points, offering networking opportunities with export advisors and industry peers.
- Several stakeholders (3 internal and 2 external) identified a need for more targeted outreach to first-time exporters and micro-businesses.
- Stakeholders emphasised the importance of earlier engagement in the export journey.

Challenges and areas for improvement
- Gaps in technical expertise: 2 external stakeholders felt that WG export support could be better aligned with business needs in regulated sectors; they cited gaps in specialist trade knowledge—particularly regarding tariff classification, customs documentation, and regulatory compliance.
- Referral processes and signposting: 2 external stakeholders noted that signposting between export support organisations could be more structured; they called for stronger collaboration with industry bodies and improved referral mechanisms.

Future considerations for the export support
- Targeted sectoral support: 3 external stakeholders suggested prioritising high-growth sectors (e.g. semiconductors and agrifood) and building on cluster-based models.
- Regulatory clarity and guidance: 2 external stakeholders highlighted the need for clearer, more accessible guidance on post-EU exit regulatory requirements; this was not a criticism of existing resources, but a call for enhanced outreach to increase confidence among exporters.
- Stronger collaboration across agencies: 3 external stakeholders recommended deepening collaboration between the export support agencies, highlighting the value of joint events and formal referral processes.

3.1. Introduction

This chapter synthesises the eight qualitative interviews that were conducted with internal stakeholders (ITAs) and external stakeholders. While the sample size was small, the interviews yielded valuable qualitative perspectives on the strengths, challenges, and opportunities associated with WG export support. These insights align with several of the themes raised by businesses in the survey, and help to contextualise findings on engagement, challenges, and programme effectiveness. However, given the limited number of participants, and that qualitative data generally reflects perceptions and experiences rather than objective conditions, these findings should be interpreted as indicative rather than conclusive.

3.2. Effectiveness of the export support

Among the stakeholder interviewees, 6 out of 8 agreed that WG export support is a crucial enabler for Welsh businesses, particularly SMEs, looking to expand into international markets.

3.2.1. Main programmes highlighted

Trade missions, OBDVs, and ITD initiatives were widely praised for their role in facilitating market entry and reducing the financial burden of exporting.

OBDVs were regarded as highly valuable and cost-effective, offering a 50% subsidy that makes international trade visits more accessible for smaller businesses.

3.2.2. ITO programme

The ITO received more mixed feedback. While its aims were appreciated, 3 internal stakeholders noted that businesses often found the outcomes underwhelming—particularly when expected meetings in overseas markets failed to materialise or lacked strategic value. This is further discussed in 3.3.1.

3.2.3. Awareness and engagement events

The 3 internal stakeholders praised the Explore Export Wales conferences (North and South Wales) as effective in increasing engagement and awareness. These events were seen to drive businesses to the Business Wales export support website and encourage them to register for support. Conferences also offered networking opportunities, enabling businesses to connect with export advisors, industry experts, and fellow exporters.

3.3. Challenges and areas for improvement

While WG export support was broadly seen as effective, stakeholders identified areas where the current model could be refined to improve efficiency and impact.

3.3.1. Internal stakeholders

Three stakeholders observed that delivery of export support is often reactive rather than proactive, with businesses typically seeking support themselves rather than being actively identified and encouraged to participate.

Events such as the Explore Export Wales conference have engaged some businesses, but stronger marketing and targeted outreach are needed to reach currently unsupported businesses.

First-time exporters and micro-businesses may require more proactive engagement to explore international opportunities.

Two stakeholders suggested the reactive approach may reflect operational or resourcing constraints, such as the need to assess eligibility and capacity before engaging businesses more actively.

All 3 stakeholders agreed that more could be done to raise awareness earlier in the export journey, particularly for businesses with potential but limited international experience.

It was noted that some businesses expressed dissatisfaction with elements of the ITO programme. Consultants sometimes struggled to secure meetings in overseas markets, resulting in fewer high-value connections than expected.

This was more common during or shortly after the virtual delivery period introduced during Covid-19, and in cases where businesses had limited prior engagement.

As these comments regarding to the ITO programme were raised by a minority of internal stakeholders, the findings should be interpreted as reflecting isolated concerns rather than a systemic issue. [footnote 16]

3.3.2. External stakeholders

Two stakeholders stated that the expertise provided by WG is not always sufficiently in-depth or tailored to business needs. It was noted that some businesses require more technical trade expertise — for example:

- detailed, market-specific knowledge of tariff codes
- commercial invoices and export documentation for overseas customers
- country-specific regulatory compliance

[16] The evaluators note that all ITO projects are subject to a formal sign-off process by the recipient business, and where delivery falls short, actions such as supplier intervention, fee waivers, or alternative support may be considered.

- WG staff were described as offering broad and effective support, but more specialised technical knowledge would help businesses in complex regulatory environments or high-risk markets [footnote 17]

Two stakeholders suggested that advice could be better aligned with the requirements of highly regulated sectors (e.g. aerospace, life sciences, renewables). Additionally, referrals and awareness-raising efforts could be more structured and proactive; signposting to other export support remains informal and inconsistent.

One stakeholder noted limited follow-up on referrals, with some referrals from other organisations to WG not acted upon, leading to missed engagement opportunities. It was suggested that WG strengthen sector-specific expertise by:

- deepening collaboration with industry specialists, trade associations, and other export support organisations
- improving referral mechanisms and signposting processes to ensure businesses receive timely and relevant support

3.4. Future changes to the core export support programmes

Five stakeholders – 3 internal and 2 external – agreed that the WG export support needs to evolve in response to changing trade dynamics, post EU-exit challenges, and shifting business needs. A main priority is expanding outreach to first-time exporters and micro-businesses, with calls for the WG to proactively identify and engage businesses that have export potential. [footnote 18] It was highlighted that there is a disparity between businesses that are highly engaged with WG export support and those that are unaware of the opportunities available. Addressing this awareness gap is critical to ensuring that more businesses can access relevant support.

External stakeholders identified the following areas for development.

3.4.1. Sectoral focus

Three external stakeholders suggested a stronger sectoral focus, particularly in high-growth industries such as semiconductors, agrifood, and professional services. Freeports were also highlighted as opportunities that could be maximised to strengthen Wales' export capacity.

3.4.2. Cluster-based engagement

Two external stakeholders highlighted the importance of cluster-based support in improving engagement and impact, emphasising the need for targeted sector-specific engagement. It was suggested that future WG export support should build on this, ensuring that businesses

[17] The evaluators note that WG are not expected to provide technical trade compliance advice directly (e.g. on commercial invoices, tariffs, or overseas regulations). Instead, businesses requiring specialist technical guidance are typically referred to delivery partners such as Chambers of Commerce organisations, the Rapid Deployment Programme, or appropriate ITO consultants. ITAs focus on advisory and coordination roles and are not insured to provide formal regulatory advice.

[18] In recognition of this area of need, WG introduced the New Exporters Programme in the 2021-22 financial year. See [New Exporter Programme | Business Wales - Export]

receive tailored assistance that aligns with the unique challenges and opportunities within their respective industries. [footnote 19]

3.4.3. Regulatory clarity

External stakeholders noted that many businesses – particularly SMEs and first-time exporters often struggle with post-EU exit trade frictions and compliance for markets such as the EU and US.

3.4.4. Enhanced guidance

It was noted that while WG information channels exist, businesses would benefit from:

- targeted webinars
- clearer signposting
- responsive support on evolving regulatory issues.

These suggestions were not framed as criticisms of existing provision, but as a call to enhance visibility, confidence, and access to practical guidance. [footnote 20]

3.4.5. Collaboration

Three external stakeholders encouraged WG to deepen collaboration with DBT, Chambers of Commerce, IoD, and CBI. Stakeholders suggested that businesses would benefit from:

- more formal signposting and communication between export support organisations
- joint events, workshops, and collaborative initiatives to widen access to expertise, market insights, and funding opportunities

3.4.6. Strengthening Wales' International Profile

Two external stakeholders suggested that raising Wales' international profile should be a strategic priority. They identified the following areas for development:

3.4.7. National branding strategy

It was suggested that WG place greater emphasis on a clear and cohesive national branding strategy to promote the uniqueness and quality of Welsh products and services globally. One stakeholder proposed developing a branding initiative, similar to 'Made in

[19] In this regard, the WG Export Team introduced the Export Clusters programme in 2021, with the intention to provide tailored sector-specific support to exporting businesses in Wales.

[20] The evaluators note that technical sessions on CBAM, export licensing, and GPSR have been delivered through Explore Export Wales and other channels. The stakeholder comments reflect a desire for expanded outreach and reinforcement of existing guidance, particularly for newer exporters or those in highly regulated sectors.

Britain', to strengthen recognition of Welsh goods and services and position Wales as a trusted and recognised exporter. [footnote 21]

3.4.8. Cultural distinctiveness and soft power

Two external stakeholders noted that Welsh culture and identity are not always leveraged effectively in international trade promotion. They suggested that enhancing Wales' international presence, by emphasising cultural distinctiveness and soft power, could help unlock additional trade and investment opportunities, particularly in sectors where origin and identity matter.

[21] In this regard, the Cymru/Welsh brand is already used as part of international promotion efforts, including through the Trade & Invest Wales campaign and dedicated branding at overseas events.

4. Welsh Government beneficiary survey responses

Chapter 4: summary

Main findings on export support effectiveness (1 of 2)

- Businesses cited trade missions, ITD, and OBDVs to be the most impactful interventions, particularly in helping them secure new clients and expand into international markets.
- Physical trade missions were rated the highest-impact intervention, with respondents highlighting the importance of in-person engagement in building trust with overseas buyers.
- Online export support tools (e.g., Export Hub, BOSS training) received mixed feedback, with lower engagement levels and a higher proportion of businesses stating they had minimal or no impact on export performance.
- Among qualitative responses to the survey, 24 respondents reported that WG support enhanced their strategic thinking or market focus.
- However, 5 respondents said the market intelligence provided by consultants was of limited value and could be replicated in-house.

Export performance and market expansion

- 63.4% (78) of surveyed businesses reported increased turnover since receiving support, and 60.0% (72) reported an increase in export sales.
- 55.4% (67) attributed their export growth to WG support, while 16.5% (20) disagreed, citing other business strategies or market conditions as the primary drivers.
- Businesses reported expanding into new international markets, including the US, Germany, as well as Middle Eastern and emerging markets.
- 28.3% (34) reported diversifying into new sectors, particularly in industries such as civil nuclear, offshore renewables, aerospace, and healthcare technologies.

Employment and business growth

- 43.8% (46) reported safeguarding jobs, while 17.1% (18) reported increasing their workforce as a direct result of export support.
- Several credited OBDVs and trade missions with helping them secure long-term contracts, which in turn supported sustained job creation.
- Several businesses (5) reported that support helped them strengthen existing international relationships or expand into adjacent markets.

Chapter 4: Main findings on export support effectiveness (2 of 2)

Challenges and areas for improvement

- Market intelligence gaps, market selection, and external shocks were the most common export challenges businesses faced.
- Eight respondents highlighted that while the support helped address some of these challenges, its impact was often moderate rather than transformative.
- Nine businesses cited ongoing disruption from EU-exit (e.g. compliance burdens, loss of EU customers), while 6 referenced residual effects from Covid-19.
- Three respondents reported frustration with inflexible trade mission schedules or administrative eligibility rules, which limited their ability to fully engage with support programmes.

Future support needs

- Five respondents called for more sector-specific support, especially in highly regulated industries like aerospace and life sciences.
- Six respondents requested better regulatory guidance, particularly around post-EU-exit compliance, product certification, and documentation.
- Four respondents requested greater flexibility in funding cycles, while others suggested more responsive support for bespoke trade shows or market-entry activities.

4.1. Introduction

The online survey targeted 760 Welsh businesses known to have accessed the WG export support between the financial years 2017-2024. This included both active exporters and those yet to begin exporting.

Participation in the survey was voluntary, with each question designed to be optional to encourage maximum response rates. The survey was live from the end of July to mid-November 2024. A total of 196 businesses were removed from the initial sample for various reasons.[footnote22]

Following these adjustments, the final sample size was reduced to 564 businesses. The survey achieved 154 complete responses, with 149 responses in English and 5 in Welsh, resulting in a 27.3% response rate. An additional 160 partial responses were received; however, due to incomplete submission of the survey, these were classified as non-responses and excluded from the final analysis.

Contact details and information regarding the type of support accessed were prepared by the WG Trade Analysis Team, who undertook the data collation and cleaning process. Miller Research reviewed the final dataset to resolve any remaining duplications or inconsistencies before survey dissemination.

The survey dissemination included an initial invitation, and 4 subsequent reminder emails aimed at both non-respondents and partially responding businesses. In the survey,

[22] 172 were undeliverable, 21 ceased operations, and 3 had full mailboxes.

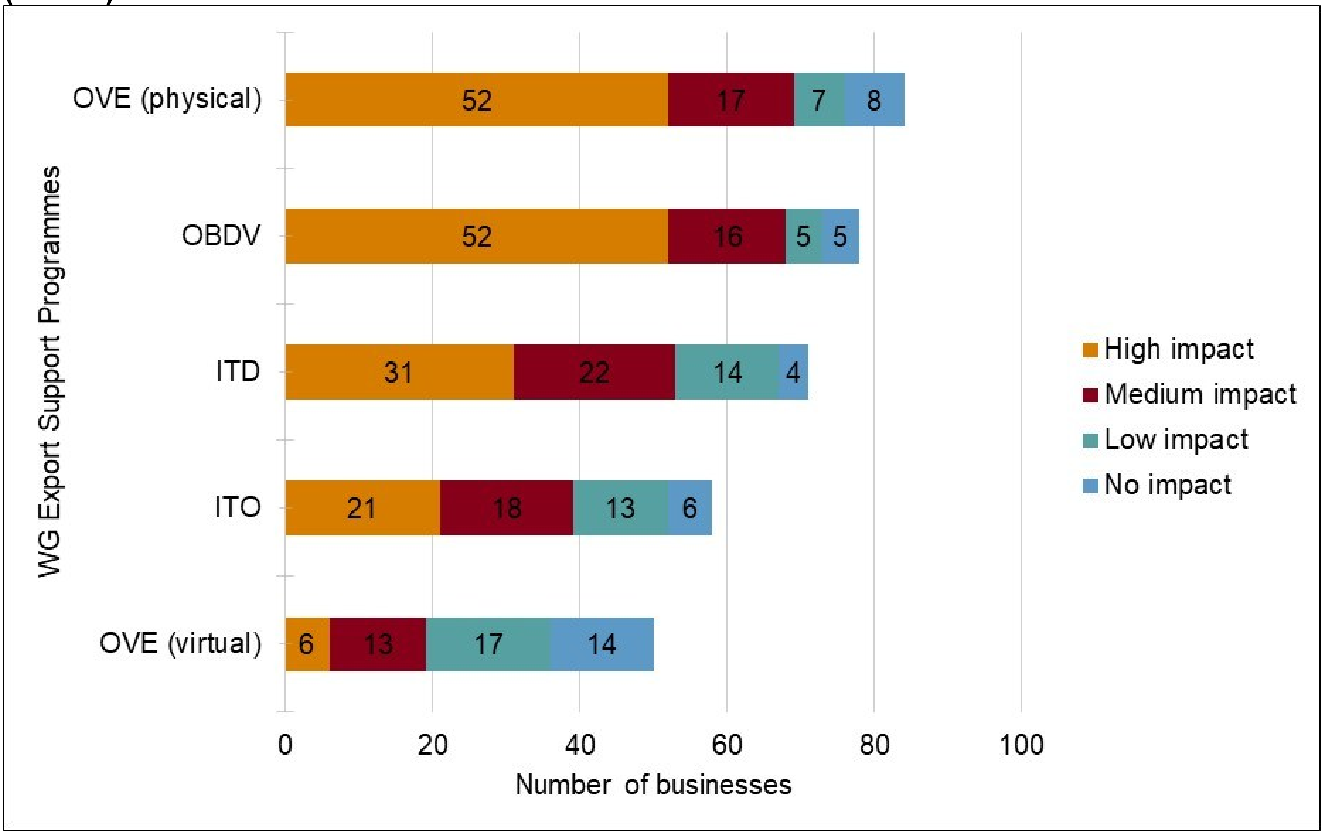
businesses were also invited to participate in follow-up qualitative interviews; 38 of the 81 respondents to this question agreed to be recontacted, representing 47.0% of this subgroup. This led to the completion of 17 in-depth interviews, providing qualitative insights into the impact of WG export support. These are discussed in Chapter 5.

4.2. Analysis of beneficiary survey responses

This chapter presents findings from the beneficiary survey of 154 supported businesses. Information regarding beneficiary business characteristics and how this reflects the population of all supported businesses is provided in Annex D.

4.2.1. Insights on export support impact

Figure 4.1. Number of businesses rating impact of export support on export sales (n=114)

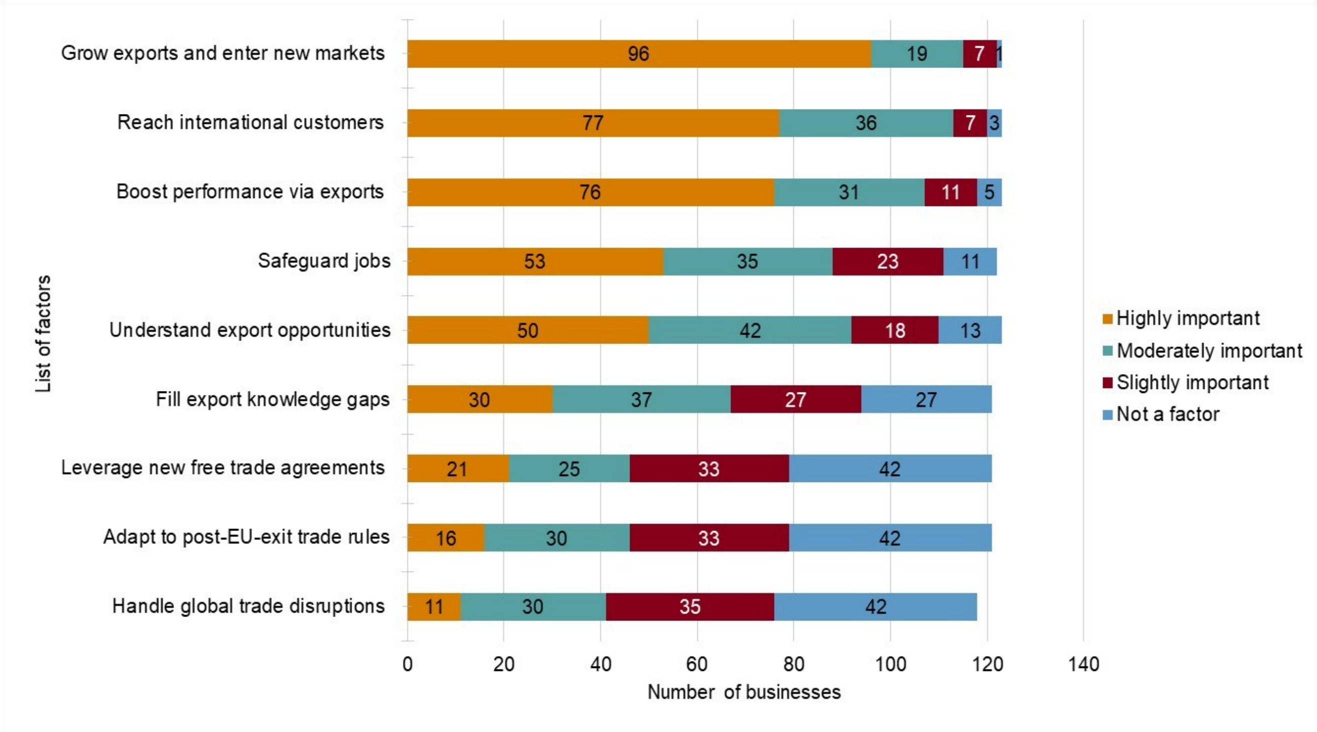


Source: Export support evaluation - beneficiary survey, 2024

Survey respondents were asked to assess the impact of the export support services provided by the WG. As shown in Figure 4.1, OBDV and physical trade missions/exhibitions had the highest impact, with 52 respondents rating both programmes as having a high impact on their export sales. ITD was also rated highly (31), followed by ITO (21).

In contrast, virtual overseas trade missions/exhibitions were perceived as less impactful with 6 respondents reporting a high impact, compared to 17 reporting low impact and 14 indicating no impact at all. This difference suggests that respondents place greater value on in-person engagement and direct market access opportunities over virtual alternatives.

Figure 4.2. Factors influencing business' decision to seek export support (n=124)



Source: Export support evaluation - beneficiary survey, 2024

Respondents were asked to assess the importance of various factors that influenced their decision to seek support from the WG. Figure 4.2 shows that in terms of factors identified as 'highly important', the most important was growing exports and entering new markets (96 respondents), followed by reaching international customers (77), and boosting business performance via exports (76).

Safeguarding jobs (53 respondents), gaining a better understanding of export opportunities (50), and addressing gaps in a company's internal exporting expertise (30) were also important drivers, while factors including leveraging new free trade agreements (21), adapting to trade regulation changes (16) and managing global trade disruptions (11) were less important to respondents. A small number of respondents offered additional qualitative comments on these themes. These views should not be assumed to reflect the wider respondent base. They are presented here as potentially useful feedback for WG consideration.

Qualitative feedback

Two respondents highlighted a need for continued support to maintain and strengthen existing market presence, particularly in industries with rapidly shifting trade dynamics.

One respondent in the perishable foods industry described the highly perishable nature of their goods and the short-term nature of contracts, noting that the export landscape can shift within a week. They emphasised the importance of maintaining a presence in existing markets, which, in their view, includes ongoing support to help sustain relationships with existing customers.

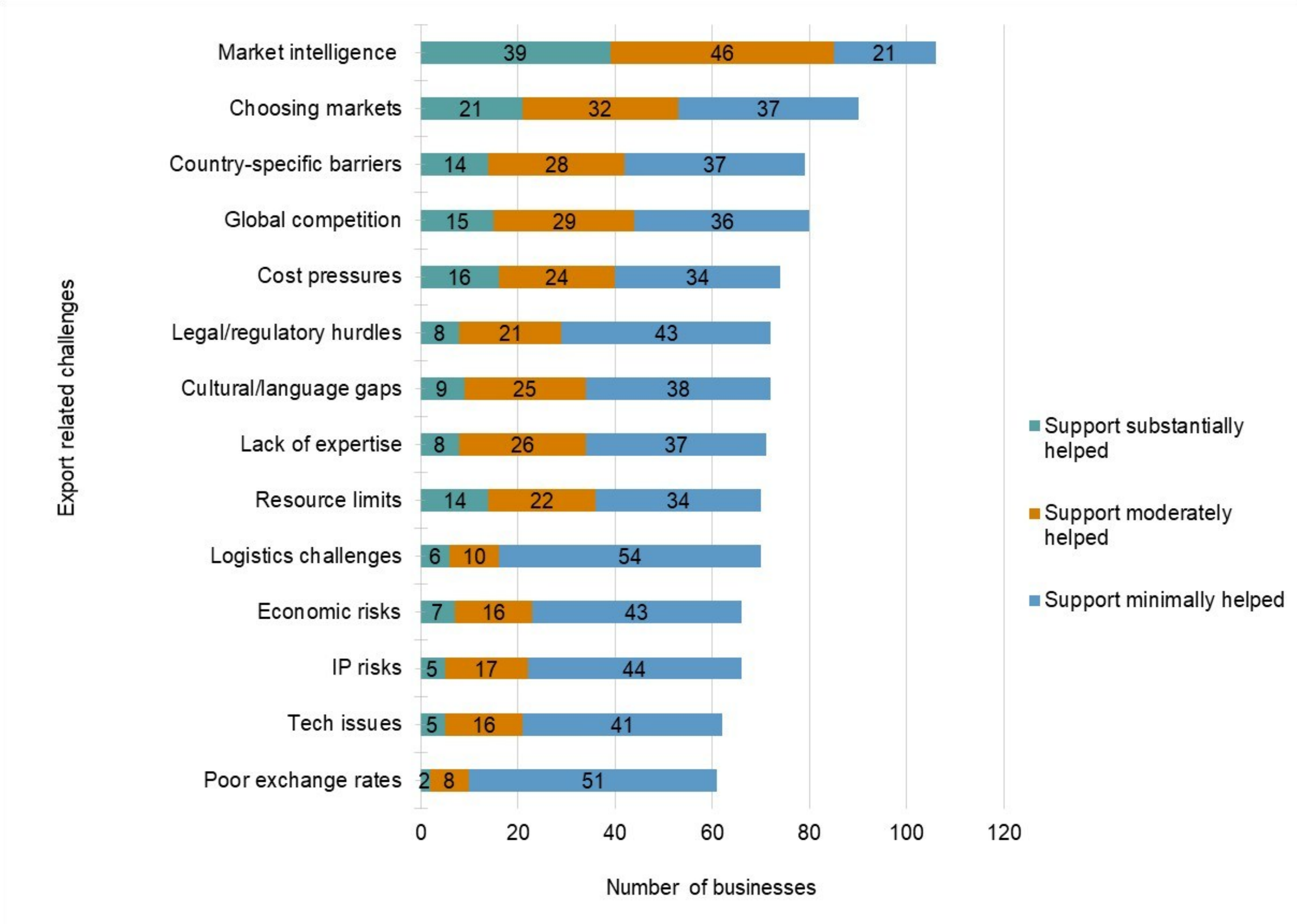
Another noted that while the WG Export Team had been invaluable to their export success, the ability to maintain relationships with existing international customers was just as crucial as market expansion. While the day-to-day responsibility for managing these relationships rests with businesses, this suggests that continued government support can be seen by some as an important enabler of their ability to do so effectively.

Participation in trade shows and international events was highlighted as an enabler of growth, with one respondent noting that attendance at Mining Indaba (an industry-specific trade fair focused on the African mining sector) resulted in their most significant sales and future pipeline.

However, 2 respondents raised concerns about funding limitations, particularly in terms of the number of staff members that could be supported to attend trade shows. One of these respondents noted that due to the nature of their business, they needed to take multiple members of staff to trade shows to “make the best of the opportunities”. They further stated that increased funding to cover additional staff members would be beneficial and would allow them to maximise commercial opportunities.

It should be noted that under the WG export support arrangements, there are limitations on the number of staff supported. Funding covers up to 2 representatives for exhibitions, and one representative for OBDVs. Businesses can send additional staff at their own expense if they wish.

Figure 4.3. Export related challenges and the effectiveness of the support (n=115)



Source: Export support evaluation - beneficiary survey, 2024

Survey respondents were asked about the export challenges they faced and the extent to which WG support helped them overcome these. As Figure 4.3 indicates, the most common challenges experienced by respondents were market intelligence (106 respondents), choosing markets (90), and country-specific barriers (79). Among those who responded to this question, ‘moderate’ and ‘minimal’ impact ratings were more frequent than ‘substantial’, suggesting that while support was helpful, it did not fully address these challenges for many respondents. It is worth noting that market intelligence – the most commonly cited challenge – was perceived to have the most substantial impact. This suggests that, where support was provided, it was effective in addressing businesses’ most pressing needs. A small number of respondents offered additional qualitative comments on these themes.

Qualitative feedback

Two respondents reported that in-market research services and pre-overseas visit meetings had been valuable for strategic planning and maximising time spent overseas.

Similarly, 2 other respondents praised the travel support offered when entering new markets. One respondent noted that assistance from the WG Export Team had been crucial for assessing their product and market fit in Indiana, USA, describing the insights provided as extremely valuable for understanding regional opportunities.

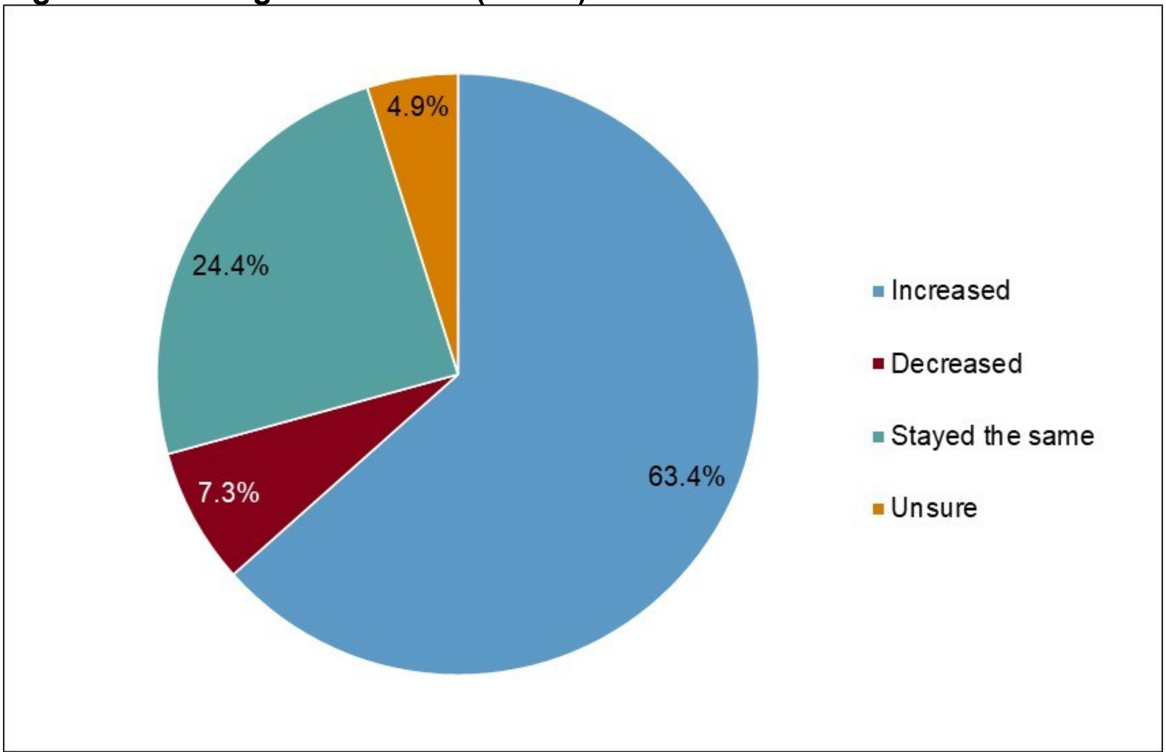
Two other respondents indicated that consultant-led research was less effective than anticipated, with one stating that they could replicate most of the findings in a fraction of the time. Another respondent commented that they were unable to access financial support due to restrictions on eligibility for recent WG funds, despite their position at the forefront of their industry. The respondent did not specify which eligibility criteria or funding programme this referred to.

Beyond funding, external factors such as EU-exit and Covid-19 were also reported as having a significant negative impact on export activity. One business, for example, described achieving regular monthly sales to EU markets prior to the EU-exit, but reported that post EU-exit regulations had effectively ended this trade, resulting in substantial cumulative revenue losses. The respondent also suggested that if the WG created an EU-based distribution hub this could potentially help Welsh exporters in the future. [footnote23]

One respondent outlined difficulties in establishing cost-effective distribution arrangements for US and EU markets following EU-exit, leading them to independently set up alternative systems.

While these views reflect individual experiences rather than sector-wide trends, they illustrated the practical barriers Welsh exporting businesses may face when adapting to new international trade conditions.

Figure 4.4. Change in turnover (n=123)

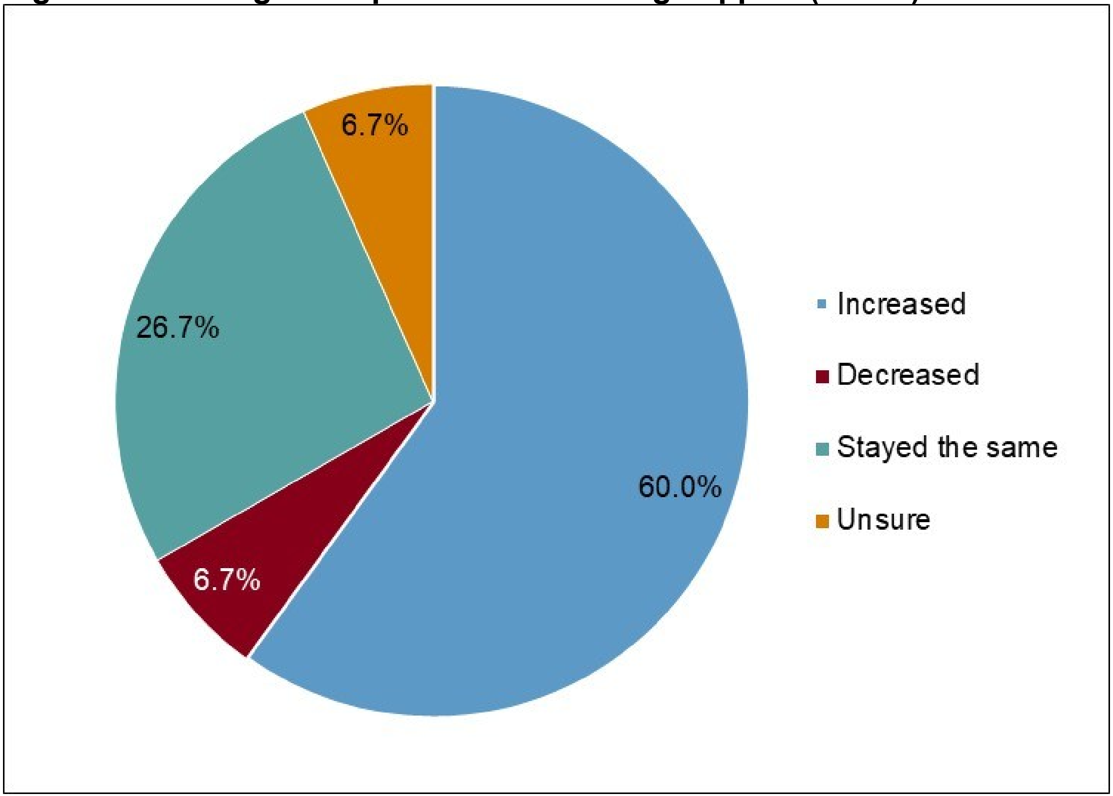


Source: Export support evaluation - beneficiary survey, 2024

[23] The evaluators note that decisions regarding distribution infrastructure are typically commercial matters for businesses rather than areas for government intervention.

Respondents were asked whether their turnover had changed since receiving WG export support. Figure 4.4 shows that 63.4% (78) of respondents reported an increase in turnover, while 24.4% (30) saw no change, and 7.3% (9) experienced a decline. 4.9% (6) were unsure. No qualitative comments were provided.

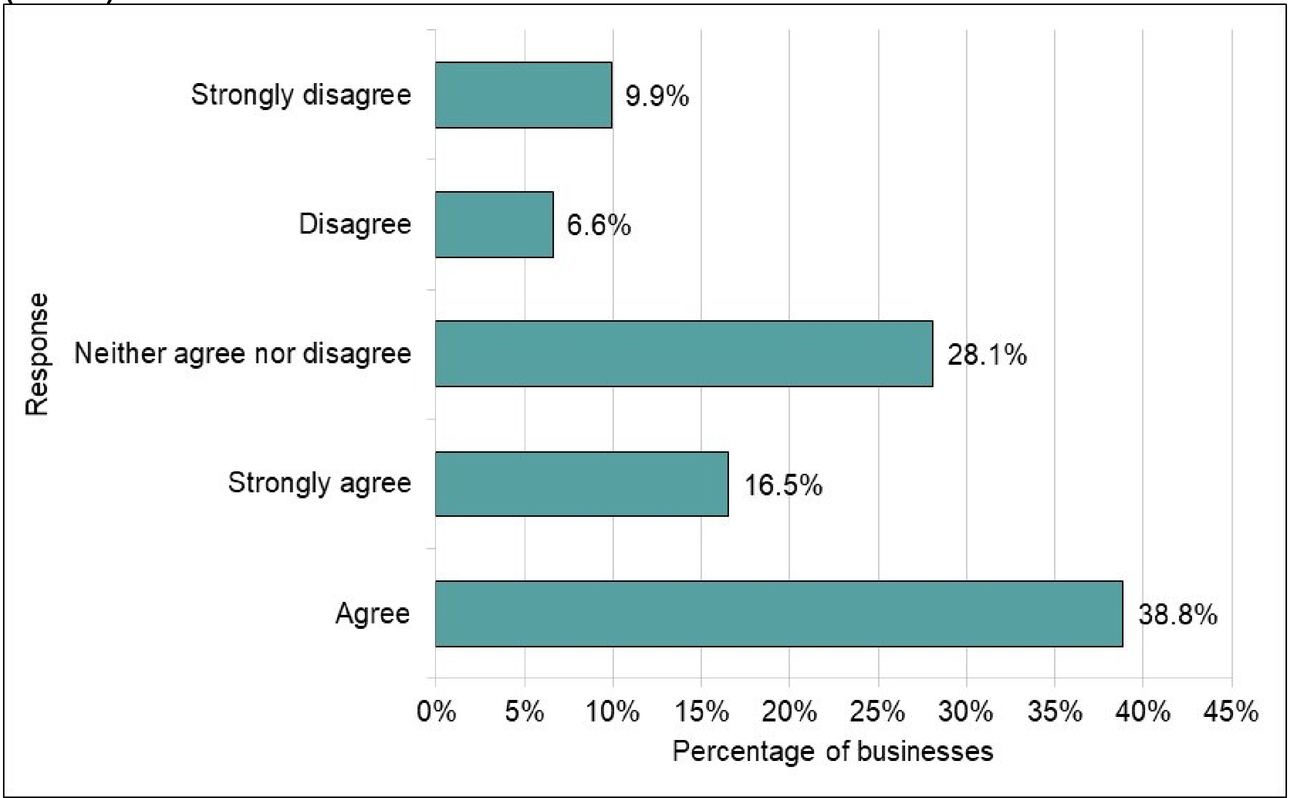
Figure 4.5. Change in export sales following support (n=120)



Source: Export support evaluation - beneficiary survey, 2024

Respondents were asked whether their export sales had changed since receiving WG export support. As shown in Figure 4.5, 60.0% (72) of respondents reported an increase in exports, while 26.7% (32) saw no change, and 6.7% (8) experienced a decline. 6.7% (8) were unsure. No qualitative comments were provided.

Figure 4.6. Attribution of export sales to Welsh Government following support (n=121)



Source: Export support evaluation - beneficiary survey, 2024

When asked about the extent to which they attributed export sales growth to WG support, 55.4% (67) of respondents agreed or strongly agreed that such changes could be attributed to the support received, while 28.1% (34) remained neutral and 16.5% (20) disagreed. [footnote24] Qualitative feedback revealed a spectrum of views.

Qualitative feedback

Five respondents stressed the importance of participating in major international trade events and sector-specific exhibitions, noting that this visibility was important for building customer engagement and accessing new markets. Events including Mining Indaba (Cape Town), MINExpo (Las Vegas), Seafood Expo Global (Barcelona), and China Fisheries & Seafood Expo (Qingdao), were cited as instrumental in their export development strategies.

While these examples reflect individual experiences rather than majority views, they offer useful insights into the perceived value of face-to-face international exposure for some sectors.

One respondent stated that WG support in international markets enabled them to diversify into new sectors and regions, securing valuable contracts and new business opportunities.

[24] Among the 55.4% of respondents (n=67/121) who 'agreed' or 'strongly agreed' that such changes could be attributed to the support they received, 9.0 % received support prior to 2017, 3.72% in 2017, 0.83% in 2018, 4.96% in 2019, 4.13% in 2020, 1.65% in 2021, 5.79% in 2022, 12.40% in 2023, and 12.40% in 2024.

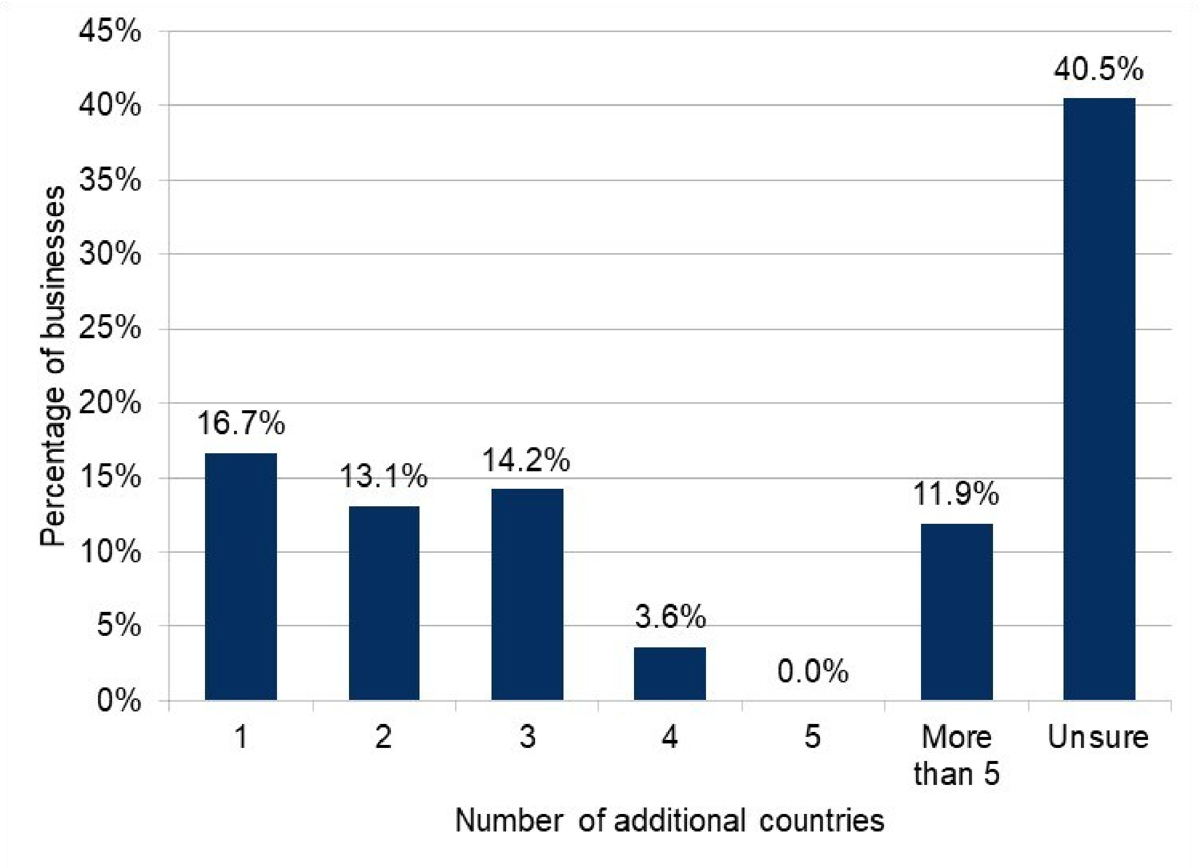
Two respondents explained that the market intelligence and advice provided through ITD and ITO support enabled them to identify commercially unviable markets early, allowing them to avoid investing resources into low-potential opportunities and to refocus their export strategies more effectively.

Another noted that long-term aerospace opportunities facilitated through WG support had the potential to double their business size over the next 5 to 10 years. However, not all respondents found a direct link between WG support and export growth.

Five attributed their success primarily to direct client relationships fostered outside of WG support, while 3 pointed to challenges such as long sales cycles—sometimes extending up to 5 years—making it difficult to immediately connect revenue growth to government assistance.

Additionally, administrative constraints limited the effectiveness of support for 3 respondents, with one noting that administrative barriers, particularly the perceived inflexibility of the WG’s calendar of supported international trade shows and eligibility processes, made it difficult to access support for events that aligned with their commercial strategies. In these cases, the timing of pre-approved trade missions did not match the businesses' target markets or critical growth periods.

Figure 4.7. Expansion into new countries (n=84)



Source: Export support evaluation - beneficiary survey, 2024

Respondents were asked how many additional countries they had exported to because of WG export support. Figure 4.7 indicates that of those that were able to answer, 16.7% (14) reported expanding into one new market, 13.1% (11) into 2, 14.2% (12) into 3, 3.6% (3) into 4, and 11.9% (10) expanded into more than 5. 40.5% (34) were unsure. Qualitative comments highlighted a broad range of new export destinations, including the USA, Germany, and Spain.

Qualitative feedback

Nine respondents noted expansion into Middle Eastern markets such as UAE, Saudi Arabia, and Qatar, reflecting strategic interest in this region.

Five noted entry into less traditional markets like Kazakhstan, Uzbekistan, and Costa Rica. (The full list of new markets beneficiary businesses exported to is detailed in Annex F).

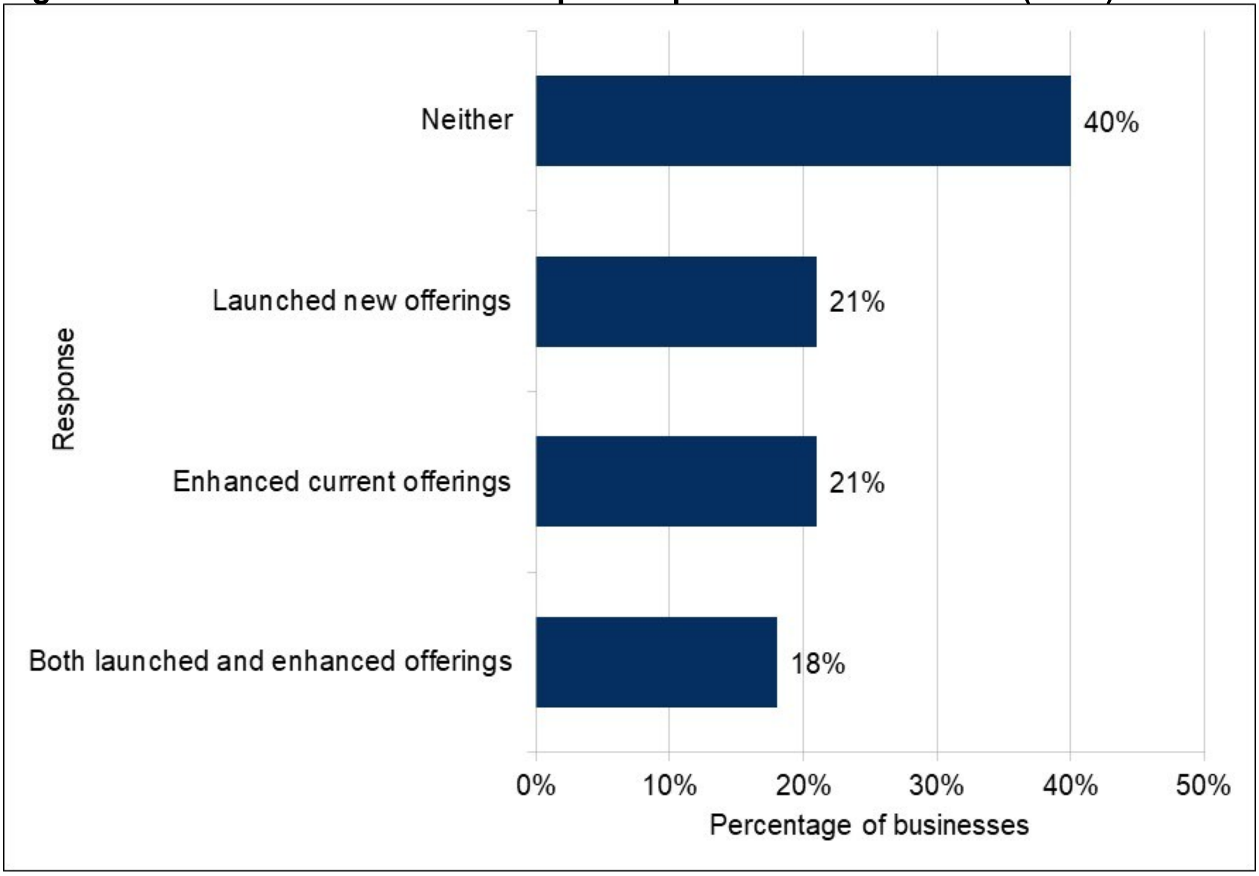
For some, WG export support helped strengthen existing trade relationships rather than open entirely new markets.

Four respondents noted improvements in exports to South Korea, Singapore, Australia, China, and Japan, where market engagement was deepened or scaled up with WG assistance.

Respondents were also asked whether they had expanded their export activities into new sectors because of the support received from the Welsh Government. 28.3% (34) of respondents reported that they had entered new sectors, while 71.6% (86) had not, suggesting that many respondents prioritised strengthening their existing market positions rather than diversifying into new sectors.

Qualitative comments from 3 respondents indicated that WG support enabled shifts in their export models. One of these respondents transitioned to online book sales via third-part sellers, while another experienced growth in international television programme sales. The third respondent noted that participation in export support activities had expanded their business development opportunities, particularly through increased inward investment intelligence and access to new business-to-business export leads.

Figure 4.8. Introduction of new or improved products and services (n=95)



Source: Export support evaluation - beneficiary survey, 2024

Respondents were asked whether they had launched or enhanced offerings because of the support received. As indicated in Figure 4.8, of those that responded, 21% (20) had enhanced current offerings. A further 21% (20) had launched new offerings, and 18% (17) had done both. Therefore, 60% (57) of respondents had launched or enhanced products or services because of WG support. Qualitative feedback was also provided by several respondents.

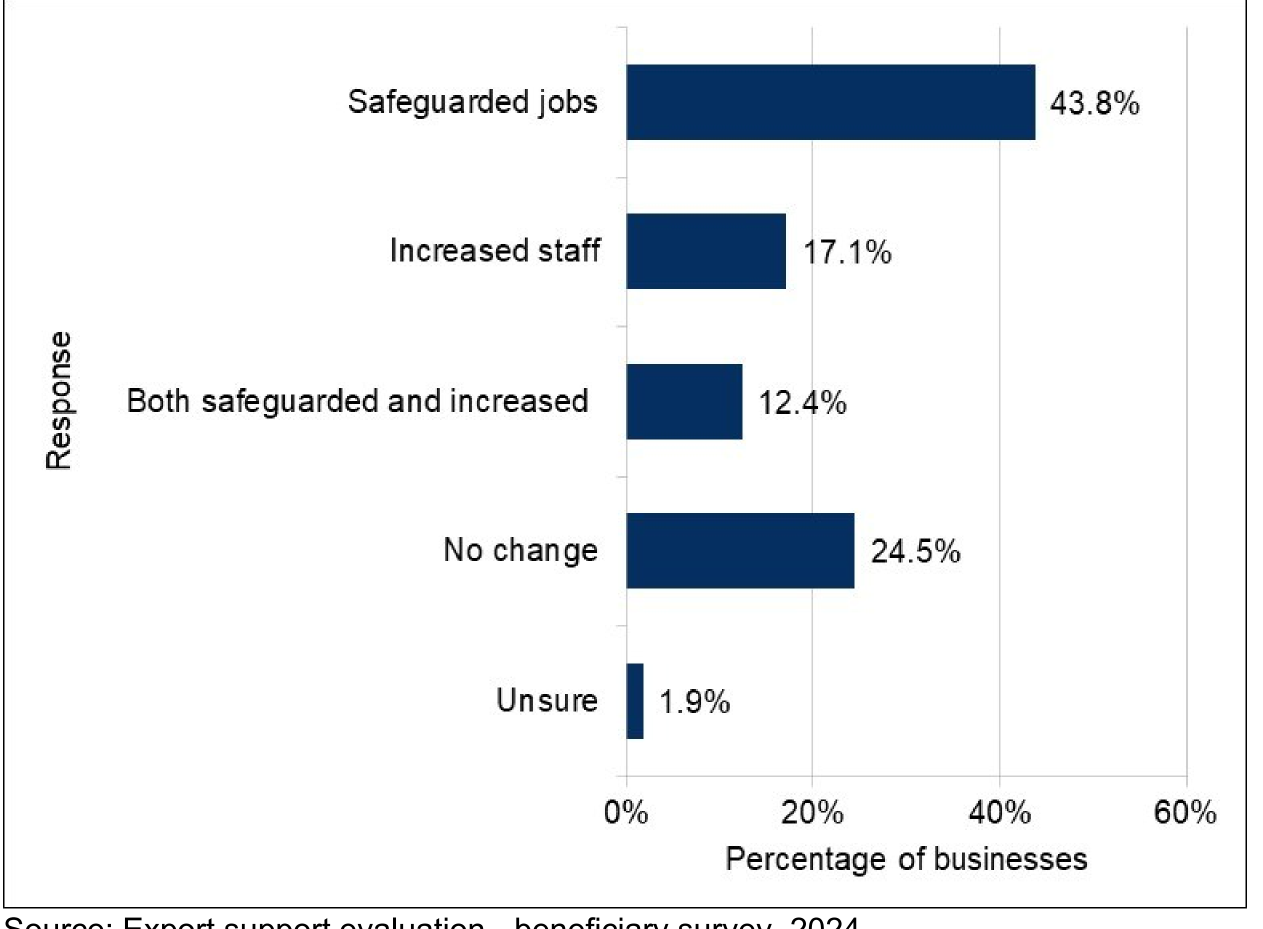
Qualitative feedback

In qualitative comments, 5 respondents stated WG support played a pivotal role in product development, crediting insights gained from market visits and customer engagement with shaping their offerings to better align with international market demands.

OBDVs were highlighted by 2 respondents as valuable in helping them better understand customer needs, leading to strategic product adaptations.

Another 3 respondents noted that WG support either facilitated new product development directly or helped identify opportunities that reshaped existing product strategies.

Figure 4.9. Employment impact of the WG export support (n=105)



Source: Export support evaluation - beneficiary survey, 2024

Respondents were asked whether the export support had contributed to job creation or the safeguarding of existing roles. 43.8% (46) of respondents stated that the support helped safeguard existing jobs, 17.1% (18) stated that they had increased the number of people employed because of the support, while 12.4% (13) indicated that they had both safeguarded jobs and created new roles.

Respondents also commented on the indirect role the export support played in sustaining or expanding their workforce.

Qualitative feedback

One medium-sized business had expanded its workforce by approximately 60 to 100 employees since 2020, attributing 20 of those jobs to WG export support.

One company recruited a dedicated International Marketing Manager, who is leading efforts to enhance multilingual marketing strategies and expand their global presence.

The following tables provide a breakdown of the number of new hires and jobs safeguarded by beneficiary survey respondents, further illustrating the employment impact of export support.

Table 4.1. Number of new hires reported by survey respondents following WG export support (n=27)

New hires	Number of respondents	Percentage of respondents
1-4	17	63.0
5-9	5	18.5
10-19	2	7.4
20- 29	1	3.7
50-100	1	3.7
>100	1	3.7

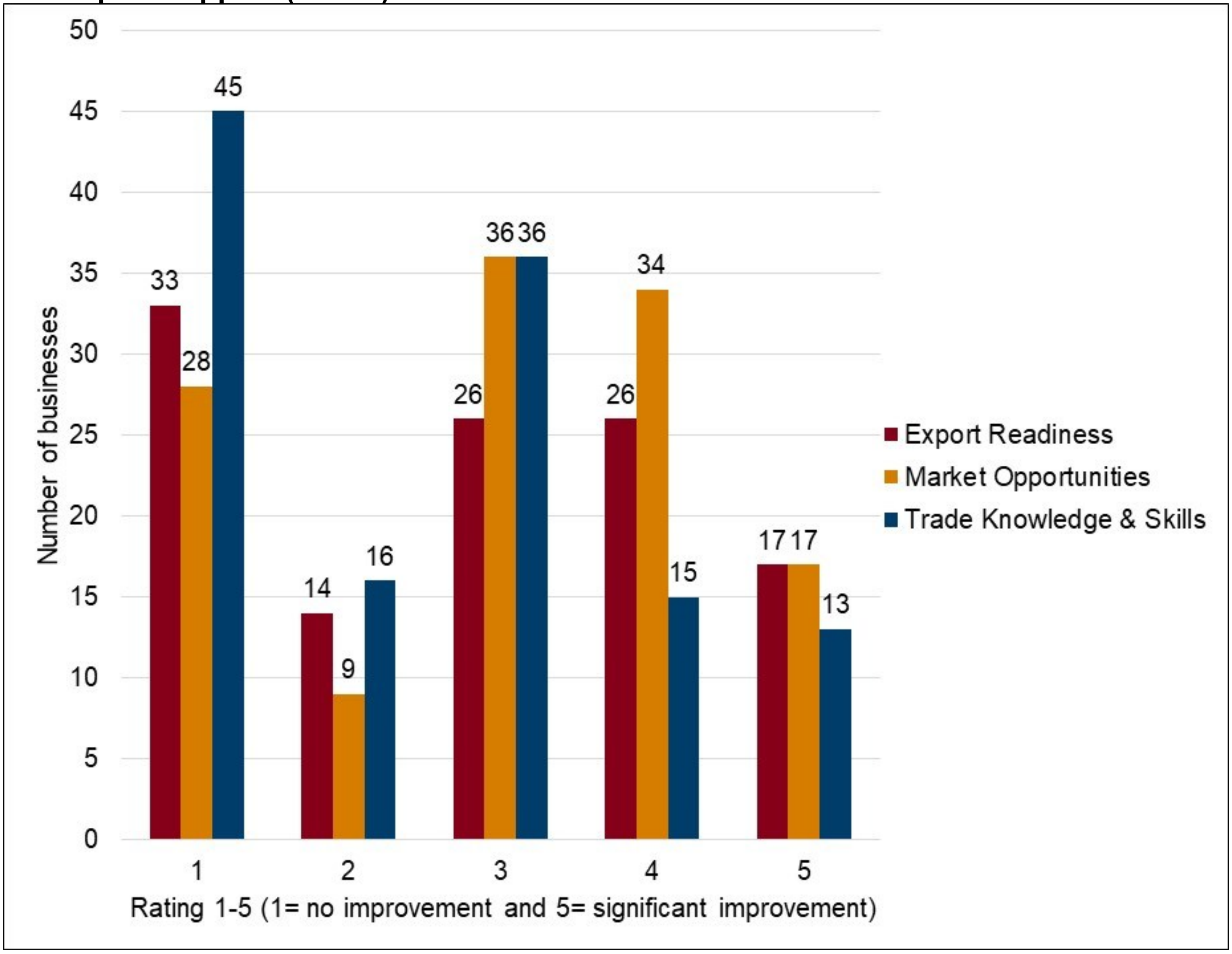
Source: Export support evaluation - beneficiary survey, 2024

Table 4.2. Number of jobs safeguarded by survey respondents following WG export support (n=58)

Jobs safeguarded	Number of respondents	Percentage of respondents
1-4	29	50.0
5-9	14	24.1
10-19	5	8.6
20-29	4	6.9
30-49	3	5.2
50-100	2	3.4
>100	1	1.7

Source: Export support evaluation - beneficiary survey, 2024

Figure 4.10. Respondent perceptions of improvement in export capabilities following WG export support (n=125)

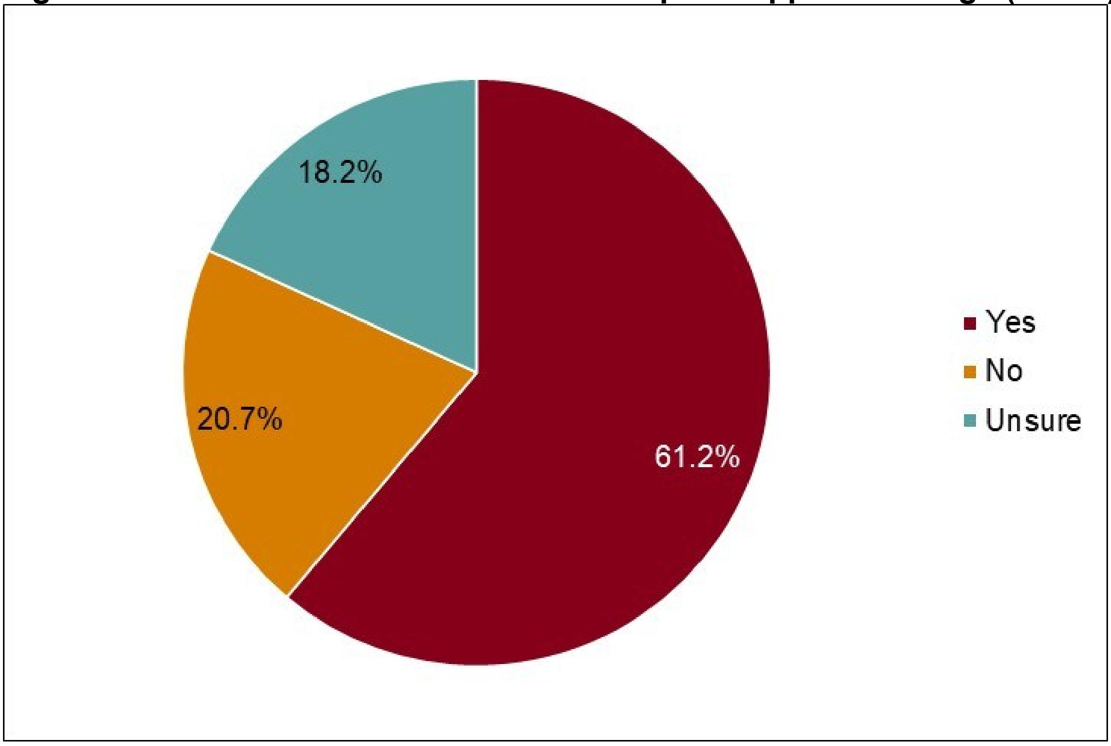


Source: Export support evaluation - beneficiary survey, 2024

Respondents were asked to rate the improvement in their export capabilities following support from the WG, using a scale from 1 to 5, where 1 represented 'No Improvement' and 5 represented 'Significant Improvement'.

A rating of 1 (no improvement) was the most common response for both Export Readiness (33 respondents) and Trade Knowledge & Skills (45), indicating that many businesses perceived limited gains in these areas. In contrast, Market Opportunities was more positively rated, with 36 respondents selecting 3 (moderate improvement) followed by 34 selecting 4 (considerable improvement), suggesting stronger perceived benefit in this area.

Figure 4.11. Increased awareness of WG export support offerings (n=121)



Source: Export support evaluation - beneficiary survey, 2024

Respondents were asked whether their awareness and utilisation of other WG export support offerings had increased due to the export support received. As shown in Figure 4.11, 61.2% (74) reported that it had, 20.7% (25) stated it had not, and 18.2% (22) were unsure. Among the 61.2% (74) of respondents who stated that their awareness and use of other WG support had increased, one provided an additional insight in the optional qualitative comments section, indicating that they had subsequently accessed the WG's Accelerated Growth Programme (AGP) to support business development and obtain research funding.

Among the 20.7% (25) who stated that their awareness or use of other WG support had not increased, 4 provided additional comments.

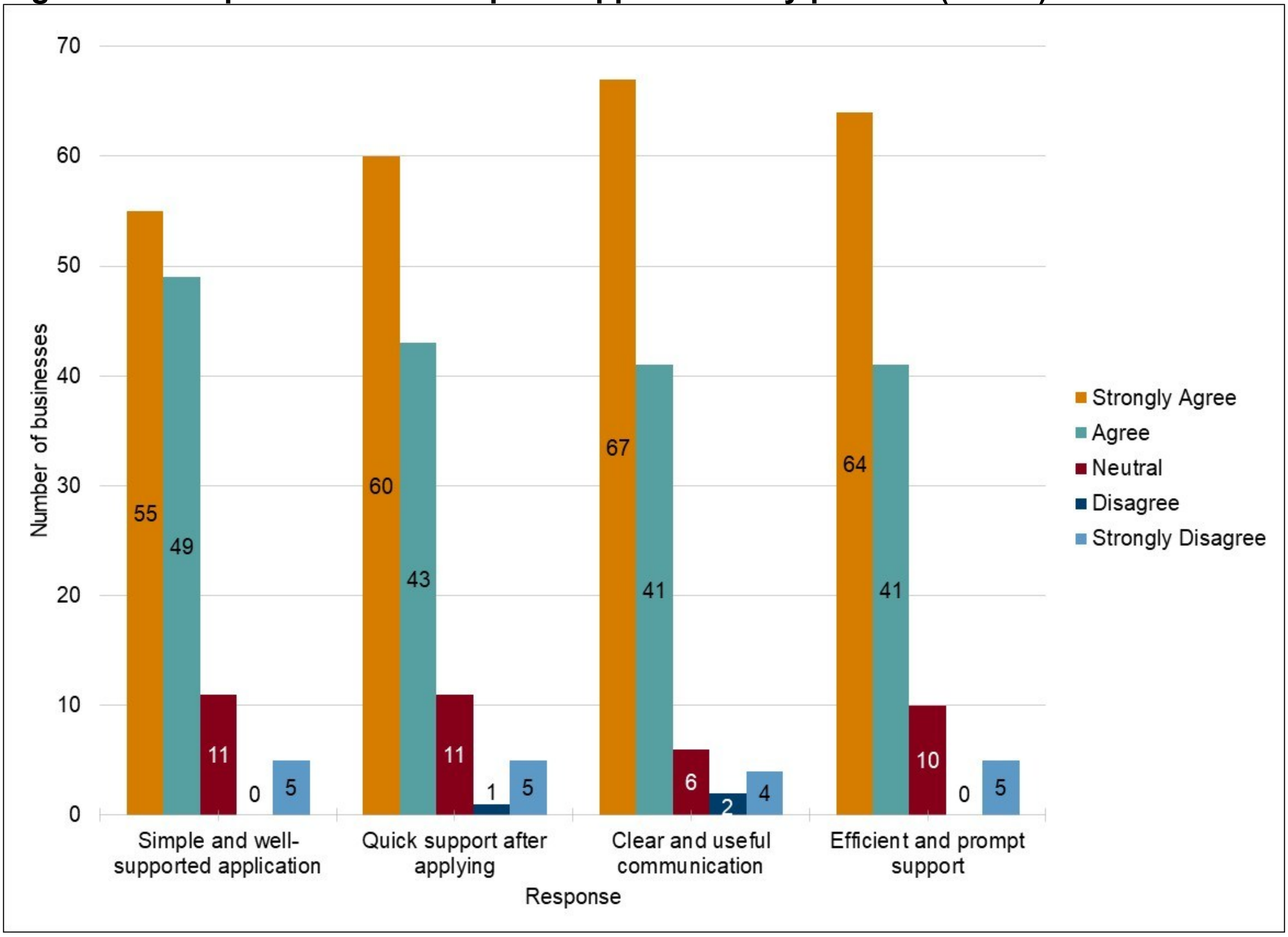
Qualitative feedback

Two noted low awareness of the support available.

One reported lack of outcomes from previous engagement.

One referenced poor experience with WG export support. No further detail on the nature of the issue with the export support was provided.

Figure 4.12. Experience of the export support delivery process (n=120)



Source: Export support evaluation - beneficiary survey, 2024

Respondents were asked to reflect on their experience with the WG export support programmes, including the application process, timeliness of support, communication, and overall delivery. As shown in Figure 4.12, 88.1% (104) strongly agreed or agreed that the application process was considered simple and well-supported, while 87.3% (103) stated that support was received quickly after applying. Communication from the support team was rated positively, with 91.5% (108) finding it clear and useful, and 89.0% (105) agreeing that overall delivery and support were efficient and prompt. Additional Qualitative comments were provided by several respondents.

Qualitative feedback

Five respondents highlighted positive experiences with the funding applications, describing these as professional, well-supported, and helpful.

Two noted that they were able to attend international exhibitions they may not have otherwise reached and described the support as easy to access and accompanied by reliable guidance.

However, there were some concerns raised about process rigidity and logistical challenges, as follows:

One respondent noted that although the support was valuable, the application process took 6 months instead of the expected 3, delaying their ability to act on opportunities.

Three mentioned challenges in trade mission organisation, including last-minute confirmations from WG, which limited preparation time and meeting scheduling.

Three respondents raised concerns about the supplier selection process, stating that they were unable to engage with or meet suppliers prior to making a selection.

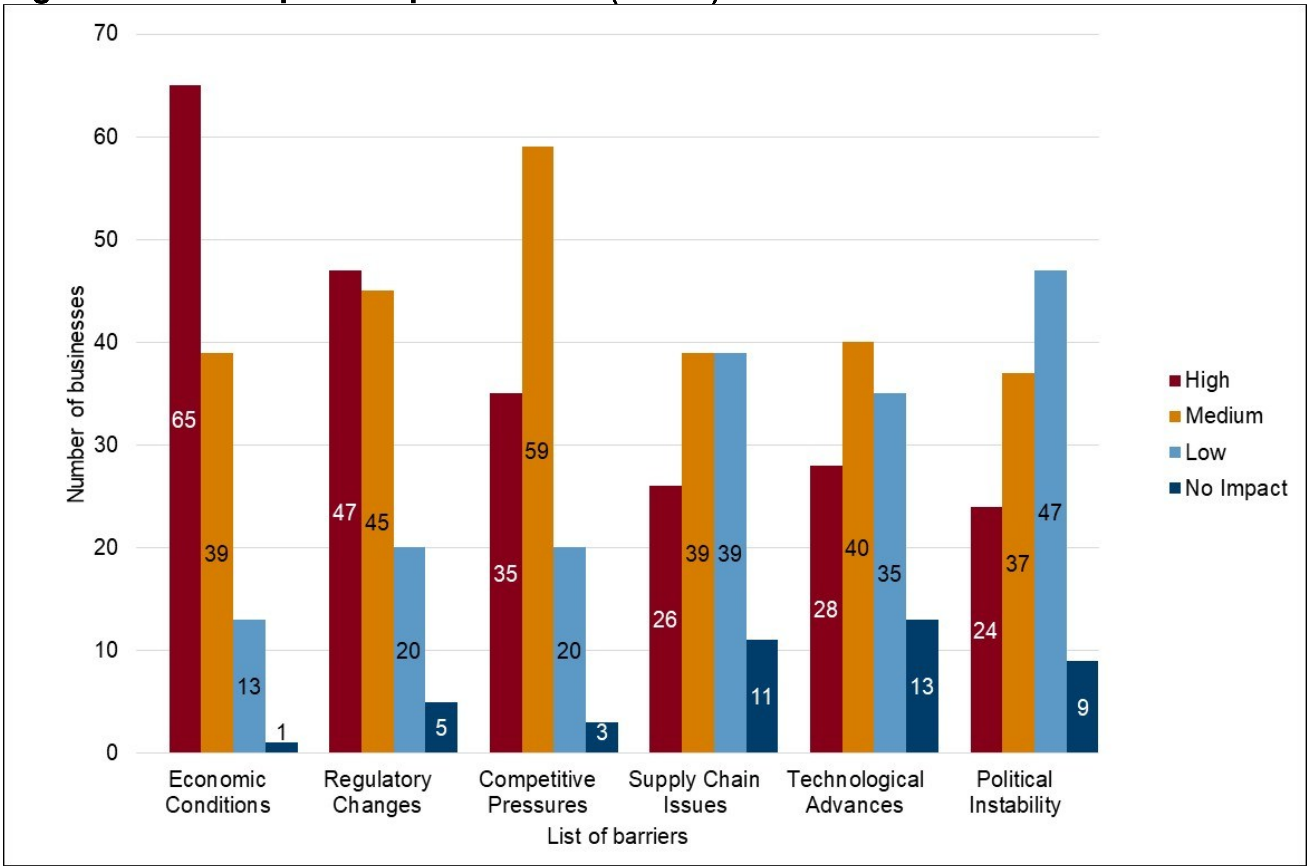
One explained that they were provided with quotes from approved providers and asked to rate the responses but were not permitted to speak with the suppliers beforehand. They noted that, in any commercial context, a buyer would typically expect to engage with potential suppliers before deciding. While they recognised that this restriction may be in place for reasons of fairness, they felt it did not reflect real-world practice and said they had to select based solely on paper proposals, which they described as “not ideal.”

Three other respondents raised concerns about the timing of grant funding for trade shows. They explained that prime exhibition spaces, flights, and hotels are booked far in advance, but due to the grant approval process, they could not reserve space or accommodation early enough, leading to higher costs and less favourable booth locations.

Two respondents highlighted a preference for greater flexibility in the funding approval process, specifically around the ability to reserve exhibition space or commit to travel arrangements before funding approval was formally issued. They noted that the current restriction can delay planning and increase costs.[footnote25]

[25] The evaluators note that under current WG eligibility requirements, businesses are not permitted to commit funds or book exhibition space prior to receiving a formal offer letter. This condition is in place to ensure that public support demonstrates additionality and that businesses would not have proceeded without assistance.

Figure 4.13. Anticipated export barriers (n=119)



Source: Export support evaluation - beneficiary survey, 2024

Respondents were asked to assess potential barriers that could impact their export activities in the future. Figure 4.13 shows that the most cited challenge was economic conditions, with 56% (65) rating this as having a high impact. Regulatory changes and competitive pressures were also widely held concerns, with 40.9% (47) and 30.4% (35) stating they would have a high impact respectively. Other high impact challenges included supply chain issues (23.0%, 26 respondents), technological advances (24.6%, 28 respondents), and political instability (20.9%, 24 respondents), although these were generally rated as having a lower overall impact compared to economic and regulatory concerns.

Qualitative survey responses reinforced the widespread concern over economic instability and regulatory barriers related to EU-exit.

Qualitative feedback

Three respondents cited post EU-exit costs and new trade restrictions as major factors limiting their ability to sell to European markets, with one stating that regulatory changes made it unviable to continue exporting medical devices to the EU.

Another highlighted the impact of new UK Government tax policies, indicating that increased costs and investor concerns could lead to more staff being hired overseas or parts of their business relocating.

Global trade disruptions were also a recurring theme, with 7 respondents pointed to Covid-19, EU-exit, the Ukraine/Russia War, and the Red Sea freight crisis as challenges that had severely disrupted their operations.

One business in the Food and Drink sector highlighted how a 5-year export ban on brown crab in China had significantly impacted growth plans, requiring financial support to recover lost opportunities and re-establish market presence. It was noted that rising logistics costs, supply chain delays, and increased customer uncertainty made it harder to maintain global operations.

Three respondents expressed the need for greater government intervention to help mitigate export barriers, particularly in relation to post-EU-exit trade with the EU.

Two highlighted the financial burden of establishing a presence in foreign markets as a major obstacle to expansion. They noted that additional funding and targeted support would be necessary to facilitate market entry and long-term international growth.

4.2.2. WG support for future export challenges

Respondents were asked whether they believed WG export support could help them overcome future trade challenges. While many valued the current offer, 27 identified specific gaps and opportunities for refinement:

Strategic role in EU trade barriers: 3 respondents suggested that WG could play a more active strategic role in tackling systemic challenges — particularly EU trade restrictions — by advocating for improved regulatory clarity and post-EU-exit market access conditions. Two others echoed this, specifically citing the need for clearer support to re-enter EU markets and financial assistance to mitigate related compliance costs.

Sector-specific support: 5 respondents called for tailored support packages, including enhanced market intelligence, compliance guidance, and industry-focused research to help navigate regulatory complexity and global market volatility.

Support for high-cost market entry: 2 respondents highlighted raised concerns about the cost of establishing in-country operations — particularly in the USA. They suggested WG support could include legal, staffing, and business set-up guidance.

Business matchmaking and peer networks: 4 respondents highlighted the need for enhanced business matchmaking support, including targeted introductions to buyers, distributors, or agents in overseas markets. Two of these also proposed structured peer networking initiatives, such as pre-visit meetings hosted by established Welsh exporters, to help guide new entrants into international trade.[footnote26]

Trade missions and international promotion: 5 respondents suggested broadening the scope and reach of these missions to include wider sector representation and target specific

[26] The evaluators note that the WG's Export Action Plan includes the Export Clusters programme, which is designed to foster stronger sector-based networks and peer support among Welsh exporters. This includes collaboration and shared learning across businesses at different stages of their export journey.

international markets such as the US and Europe. This included calls for better alignment between trade mission content and business objectives.

Capacity building and training: 2 respondents requested matched funding to support early-stage R&D for new exportable products, while 2 others highlighted the need for training in customs procedures, VAT, and logistics – areas where many currently rely on third-party expertise at their own cost.

Support for domestic UK markets: 2 respondents suggested WG could better support access to domestic near-markets such as London, Scotland, and Northern Ireland. These were framed as near-market growth opportunities that could benefit from targeted support, events, and market introductions.

5. Qualitative interviews with businesses

Chapter 5: Summary of main findings (1 of 2)

Core support mechanisms accessed
Businesses accessed various WG export support programmes to expand their international market presence, develop networks, and secure contracts.

- ITD – 4 businesses valued the market research and regulatory insights offered.
- ITO – 3 businesses credited ITO support with securing contracts and arranging market meetings, with WG introductions enhancing credibility with international clients.
- Trade Missions and Exhibitions – Recognised by 5 businesses as instrumental in international networking, customer acquisition, and market exploration, particularly with support from UK embassies.
- OBDV – Highlighted by 3 businesses as critical for enabling international expansion, especially where budget limitations would otherwise have limited in-person engagement.

Impact of the support
Businesses reported multiple positive outcomes from engaging with WG export support including:

- Competitiveness – 4 businesses noted improved international visibility and better market positioning.
- Internal business changes – 3 businesses expanded their workforce and adapted export strategies.
- Export growth and market entry – 4 businesses reported accelerated market entry and stronger international connections, with some securing significant long-term export deals.
- Product innovation – 2 businesses used insights gained from market intelligence and feedback to inform new product or service development.

Chapter 5: Summary of main findings (2 of 2)

Future exporting plans and support needs

- Six businesses expressed a commitment to continuing their export development with plans to leverage trade missions, in-market research, and targeted country visits – particularly focused on the USA, Europe, Japan, and Korea.
- Four businesses reported plans to develop new product lines or expand their international client bases.
- Five businesses called for improvements in access to grant schemes, better coordinated trade mission planning, and clearer, sector-specific intelligence to help them navigate complex regulatory environments.

Challenges and areas for improvement

While businesses valued the support provided, tailored guidance, administrative processes, and proactive engagement were highlighted as needing improvement:

- Sector-specific guidance – 5 businesses expressed a need for more specialist, industry-tailored intelligence, noting that the consultant advice, market insights, and regulatory guidance they received was sometimes too generic or lacked sufficient alignment with their specific sector needs
- Rigid funding processes – Delays in funding approvals for trade shows meant 2 businesses missed important events or paid higher costs due to late confirmations
- Limited outreach and engagement – 3 businesses noted that export support was largely reactive, with insufficient direct outreach or proactive engagement, and called for clearer communication and better signposting of available support
- Challenges securing high-value meetings through the ITO – While the ITO was generally well-received, 2 businesses reported difficulties connecting with the right distributors or partners, citing inconsistent consultant effectiveness across different regions

5.1. Introduction

This chapter summarises the 17 in-depth follow-up interviews with businesses that provided their contact details in the beneficiary survey. The interviewed businesses varied in size, sector, and export experience, with representation from industries including manufacturing, technology, life sciences, and creative industries.

The sample included both experienced exporters seeking to expand into new markets and new exporters looking for structured support to develop international trade strategies. The findings below present aggregated insights from these interviews, highlighting how businesses engaged with WG export support and its influence on market expansion, export strategies, and broader business outcomes. These qualitative findings complement the survey data presented in Chapter 4.

As qualitative research, the interview findings reflect the subjective experiences and perceptions of participating businesses. While these insights offer valuable depth and context, they do not necessarily represent objective conditions or generalisable outcomes and should be understood as perceptions rather than verified facts.

5.1.1. Main support mechanisms accessed by businesses

Beneficiary businesses had accessed a range of WG export support mechanisms to enhance international market presence, build networks, and secure new customers. This included:

ITD: 6 businesses noted that they valued the subsidised market research, particularly for identifying specific market terminology, regulatory requirements, and customer demand. Three businesses credited the ITD with providing intelligence that led to export contracts, while 2 used it to understand intellectual property protection and product design rights.

ITO: 7 businesses that accessed the ITO highlighted how the in-country consultants helped them secure valuable market contracts, arrange relevant meetings, and provide insight into local market conditions. Three businesses specifically noted that the credibility of being introduced by the WG helped facilitate stronger relationships with potential clients and partners.

Trade Missions and Exhibitions: 7 businesses interviewed noted that they had participated in WG trade missions and exhibitions. These were found to be valuable for networking, meeting new customers, and exploring new markets. Businesses highlighted the role of UK embassies in supporting the events that facilitated connections with buyers. Four businesses reported securing new customers or reinforcing relationships with existing ones through these missions.

OBDV: Funding for overseas visits, trade missions and exhibitions was frequently cited as crucial for enabling businesses to expand their international exports. Five businesses noted that attending these events enhanced brand recognition and provided direct access to potential buyers and distributors. One business reported they had accessed OBDV funding over 20 times since 2015.

ITAs: 6 businesses directly engaged with ITAs, describing them as responsive, knowledgeable, and business-focused. ITAs assisted with export strategy development, funding applications, and identifying relevant support mechanisms. The tailored advice and business-focused support from ITAs was particularly valuable for micro and small businesses in providing targeted, practical, and actionable export guidance.

Motivations for engaging with the WG support varied:

- four businesses required financial assistance to de-risk export activities
- three sought guidance on navigating post EU-exit trade barriers or expanding into new markets
- five aimed to develop a structured export strategy rather than pursuing international growth reactively

This aligns with the beneficiary survey responses, which showed that market access, funding, and expert advice were the primary reasons for seeking WG support.

5.1.2. Challenges and areas for improvement

While businesses valued the support provided, 14 highlighted areas for improvement, particularly in tailored, sector-specific guidance, administrative processes, and proactive engagement:

5.1.2.1. Strengthening of tailored, sector-specific support

Five businesses felt that the WG export support was too generalist and did not fully account for industry-specific complexities.

Specifically, 4 businesses, from highly regulated or niche industries such as aerospace, renewables, and life sciences, noted that while general market intelligence was useful, the support did not always cover their specific compliance, documentation, or technical standards. One business expressed concern that being grouped under broader categories (e.g., fisheries under Food and Drink) meant its distinct export needs were overlooked. While these perceptions may not fully reflect the tailored nature of the ITD and ITO programme delivery in practice, they represent how businesses themselves experienced the support. These gaps were described as contributing to missed opportunities, particularly in identifying the right international contacts, compliance pathways, or specialised distributor networks.

Three businesses raised the need for more digital training and practical guidance covering topics such as online marketing, website development, virtual working, and accounting. The need for a structured webinar series to provide ongoing support was mentioned. One business noted that the return of previous training on writing procurement documents would benefit others as they found it particularly useful.

5.1.2.2. Administrative and funding barriers

Eight businesses raised concerns about administrative hurdles and funding processes, particularly around grant approvals for trade shows.

Three businesses mentioned uncertainty in funding availability, noting they missed major trade shows or faced higher costs due to late confirmations.

Two businesses reported that restrictions on covered expenses (e.g., in-country travel, transport between airports) created logistical challenges. While these eligibility rules are necessarily set to ensure appropriate use of public funds, they were nonetheless experienced by these businesses as a constraint.

Three businesses described funding approval timelines as lengthy and administratively demanding, making it difficult to align with commercial deadlines. In some cases, delays meant that businesses missed opportunities to secure prime exhibition spaces or cost-effective flights and accommodation.

5.1.2.3. Engagement, awareness, and outreach challenges

Three businesses expressed a desire for WG to take an even more proactive role in reaching out directly to businesses, such as offering tailored invitations to trade missions and providing targeted guidance. While the programme actively promotes its services and maintains structured engagement through ITAs and other channels, this feedback reflects some businesses' perception that outreach could be further strengthened to ensure opportunities are widely understood.

Two businesses called for improved communication and clearer signposting on the WG website, particularly regarding available support streams and application processes. They expressed a desire for clearer, more accessible information to help businesses navigate the full range of available export support.

Lastly, while satisfaction with the ITO is generally high, 2 businesses reported difficulties in securing meetings with relevant buyers and distributors. In certain regions, in-market consultants struggled to connect businesses with the right distributors, limiting the effectiveness of international trade engagement. It was also noted that while the consultants helped them secure introductions, there was little structured follow-up or ongoing support by the WG, making it difficult to maintain and convert initial contacts into export deals.

5.2. Impact of the support

5.2.1. Competitiveness

In line with survey responses, 9 businesses noted that the WG export support helped them enhance their competitiveness in international markets. It was reported that attending trade shows and events increased brand visibility, facilitated networking with important industry players, and provided intelligence on market trends. Six businesses credited WG export support with allowing them to price their products more competitively, enter markets faster than anticipated, and position themselves alongside larger global competitors.

5.2.2. Internal business changes

WG export support frequently led to internal changes in business strategy, staffing, and investment decisions. Specific outcomes included:

Workforce growth: in line with survey responses, 4 businesses expanded their teams as a direct result of increased export sales facilitated by WG export support. One business hired 14 additional staff members, while another reported growing from 15 to 20 employees due to successful trade show participation.

Shift in export strategy: 5 businesses highlighted that they had adapted their marketing approaches, rebranded, or entered new markets after receiving export guidance.

Greater financial resilience: 3 businesses stated that the support helped them invest in growth with more confidence, particularly in the aftermath of the Covid-19 pandemic.

5.2.3. Export growth, market entry, and financial impact

Across the interviews, 10 businesses reported that the export support had significantly contributed to businesses expanding into new export markets, establishing overseas partnerships, and securing long-term client relationships. Businesses described how trade missions, in-country visits, and WG-facilitated introductions helped them overcome entry barriers and accelerate their international presence.

Four businesses reported success at European trade shows, such as the Frankfurt Book Fair, where they directly gained new customers and contracts. These events were credited not only for immediate sales but also for reinforcing the long-term strategic value of consistent market presence.

Three businesses pointed to the important role of regulatory and compliance advice provided through the ITO programme. This specialist guidance helped them navigate complex market rules, particularly in Belgium and other EU countries, enabling them to secure contracts that might otherwise not have been possible.

Two businesses noted that WG-supported in-person introductions were essential when operating in culturally sensitive markets, such as Japan. It was highlighted that face-to-face meetings, which are highly valued in these regions, were instrumental in building trust, progressing negotiations, and ultimately closing deals.

Lastly, 5 businesses reported that the financial and advisory support they received helped them withstand long sales cycles, particularly in sectors where contracts can take years to materialise. They noted how WG's sustained engagement, through both funding and expertise, provided the stability and confidence needed to pursue high-value export opportunities.

5.2.4. Product innovation

Five businesses reported that WG export support contributed to the development, refinement, and expansion of their product offerings, enabling them to respond to market demand, improve competitiveness, and secure new customers. Market intelligence gained through WG-supported conferences, trade events, and innovation partnerships provided valuable insights that directly shaped product strategies.

Three businesses credited WG support with facilitating product innovation. They highlighted how customer feedback at international trade shows led to product redesigns and new development opportunities, while 2 specifically used partnerships with research institutions—such as the Advanced Manufacturing Research Centre—to prototype new products set for launch in 2025.

Expanding product ranges was also an important outcome for 3 businesses. Two of these benefited from WG-facilitated supplier and manufacturing connections, which were instrumental in launching new products. The other noted that WG support helped them diversify and extend product lines, opening up sales to new customers.

The table below summarises the main takeaways from businesses that accessed WG export support and how they applied this support to enhance their export strategies and market growth.

Table 5.1 Forms of WG support and impacts on business export strategies

Main business takeaways from the WG export support	Application to export strategy and growth
Market intelligence from ITD research	Informed export market selection and strategy
Funding for trade missions	Enabled direct client engagement and contract negotiation
Access to in-country consultants	Facilitated connections with important market contacts
Financial assistance for exhibitions	Increased brand visibility and secured international buyers
ITA support and export planning	Strengthened long-term business growth strategy

Source: Export support evaluation - beneficiary interviews, 2024

5.2.5. Awareness and utilisation of other export support

In addition to WG export support, 8 businesses indicated they had engaged with other export-related services, including trade missions, trade show attendance, and market research assistance. While these services were seen as useful, businesses generally highlighted that WG's support offered greater flexibility and closer working relationships.

Businesses perceived WG's approach as more collaborative and adaptable than other providers of export support, allowing them to shape and engage directly with the support offering. One business specifically noted that compared to other providers, the WG's communication channels provided more direct interaction, such as access to trade advisors, rather than relying solely on formal online systems.

Despite the differences in delivery style, businesses recognised that the WG and other export support providers worked in a complementary manner, with referrals and coordination across services.

5.2.6. Future exporting

Businesses reported that WG support had played a crucial role in shaping their future export plans, with many directly attributing ongoing and anticipated growth opportunities to the assistance received. Several businesses highlighted that their export success had enabled reinvestment in expansion, and they viewed continued WG support as essential for accessing new markets and securing future deals.

Businesses explained that the support had directly contributed to securing export sales, providing the financial foundation needed for business growth. One business stated they had 6 or 7 export opportunities in the pipeline that would not have materialised without WG assistance. Others credited market research support, particularly for the US, with helping them establish valuable industry contacts and potential customers. One business expressed strong confidence in their future outlook, stating:

> "The WG support opened up new export opportunities and international visits that we would not have been able to access on our own. I am confident about our future because of the WG support."[footnote27]

Looking ahead, 11 businesses expressed a strong commitment to continuing their engagement with WG support, viewing it as an important enabler for accessing new markets. Eight planned to make use of trade missions, in-country visits, and further market research to explore expansion opportunities. Five intended to leverage WG-supported conferences and events to build on their existing export strategies, while 6 emphasised the importance of maintaining an ongoing relationship with the WG Export Team to act quickly on emerging opportunities and identify new clients and potential export markets.

5.2.7. Sharing information with the Welsh Government

Ten businesses expressed a preference for simple, low-burden methods of sharing export activity data, such as export sales, turnover, and engagement with WG support. Seven respondents specifically identified annual online reporting as a practical solution, provided the process remained concise and manageable. However, 4 businesses cautioned that export lead times often exceed a year, making it difficult to capture the immediate impact of support. They suggested that a longer-term monitoring approach — spanning multiple years — would provide a more accurate picture of export outcomes.

While some respondents supported formalised digital reporting, 5 businesses preferred more personalised engagement, such as direct conversations with an International Trade Advisor (ITA), to capture the nuances of their export progress. They explained that traditional surveys and reporting mechanisms often go unanswered, particularly in smaller businesses with limited administrative capacity. In contrast, phone or in-person dialogue were viewed as more meaningful and efficient forms of engagement.

Two businesses expressed interest in a dedicated business portal, where they could register, access support, receive advice, and provide feedback in a single platform. One business suggested a system modelled on the FSB portal, which would streamline interactions and make engagement with WG export support more accessible and efficient.

[27] Source: Qualitative business interview, 2024

6. Non-beneficiary survey responses

Chapter 6: Non-beneficiary survey responses summary (1-2)

Business performance and export activity

- 51.8% (43) reported increased turnover since they began exporting, while 31.7% (26) reported an increase in export sales.
- Growth in turnover was most attributed to increased market demand by 45.5% (35), improved product offerings by 39.0% (30), and expansion into new markets by 39.0% (30).
- 52.1% (37) reported safeguarding or creating jobs in the past 24 months.

Investment in exporting

- 52.0% (26) reported making no investment in export-related activities over the past year. Those who did invested in trade events, marketing, and R&D.
- Qualitative comments suggest this was often due to challenges linked to EU -exit or limited perceived return on investment.
- For those who did invest, spending was primarily directed at trade events, marketing, and internal activities.
- Four respondents reported substantial investment, including one citing over £100,000 for commercial and research expansion.

Market expansion and product development

- 28.9% (24) reported no expansion into new international markets, while 15.7% (13) entered 5 or more new countries.
- 32.1% (26) reported making no changes to their product or service offerings. In contrast, 19.8% (16) introduced new products or services, 16.0% (13) improved existing ones, and 28.4% (23) did both.
- Expansions into niche and technical markets were noted, often accompanied by adaptations in response to international customer demand.

Employment Impacts

- 25.3% (18) reported that they had increased staff,18.3% (13) had safeguarded jobs, and 8.5% (6) had done both.
- Among those hiring, 61.1% (22) hired between 1–5 new employees.
- 46.6% (27) reported safeguarding 1–5 roles, while one business reported safeguarding over 800 jobs.

Chapter 6: Non-beneficiary survey responses summary (2-2)

Export challenges
- The most frequently reported challenges included shipping and logistics (63) respondents, high costs (55), and economic uncertainties such as Covid-19 or EU-exit (52).
- Other reported barriers included regulatory changes (41), exchange rate fluctuations (39), and competition in overseas markets (37).
- Qualitative comments from respondents cited EU-exit as a major disruption, noting customs paperwork difficulties, changing regulations, and lack of financial support.

Alternative export support sought
- 66.2% of respondents had not sought any export support from external organisations.
- Among those who did, Chamber of Commerce organisations, DBT, and the former UKTI (since replaced by the DBT) were most cited.

Interest in WG export support
- 50.6% (42) were unaware of WG export support. Of these, 65.9% (27) said they would have used the support had they known about it.
- The most sought-after types of support were financial assistance with 59.2% (42), export advice and consultancy with 57.7% (41), and training and workshops with 45.1% (32).
- Qualitative comments from 3 respondents highlighted a need for clearer regulatory guidance, sector-specific export support, and assistance with temporary import/export procedures.

Future export support needs
- 53.4% (47) expressed interest in funding for international business development. Other frequently selected support types included legal and regulatory assistance with 29.5% (26), one-to-one export advice with 29.5% (26), and expert marketing support with 28.4% (25).
- 27.3% (24) requested training and workshops, 25.0% (22) sought export market research, and 20.5% (18) selected tailored support for early-stage exporters.
- Respondents identified the need to improve export capability in areas such as connecting with international customers (26) and understanding trade regulations (25).
- Qualitative comments reinforced these findings, with businesses requesting financial support, clearer regulatory guidance, and help with certification, language training, and attendance at overseas events.

6.1. Introduction

A survey was conducted with exporting businesses in Wales that had not received WG export support between the financial years 2017-2018 to 2023-2024. To achieve this, the WG sourced a full list of Wales-based exporters from Find UK Traders[28] which was cross-checked against records in FAME, a business database which holds information on business size, industry sector classification, director contact details, and Company

[28] Find UK Traders

Registration Numbers (CRNs). Where a direct match was not found in the database, Companies House records were used to identify additional details.

To ensure that only non-beneficiaries were included in the final sample, a data cleaning process was undertaken by the WG to remove businesses that had received WG export support. Elimination of beneficiary businesses from the sample involved:

- CRN matching to WG records
- ‘fuzzy’ index-matching on company names
- postcode matching

For the administration of the survey, a ‘push-to-web’ approach was adopted, in which hardcopy letters were sent to named directors of Wales-based non-beneficiary businesses, identified through the process outlined above. The letter then directed recipients to the survey via an online link. As with the beneficiary survey, participation in the non-beneficiary survey was voluntary, with each question designed to be optional to encourage maximum participation and responses. The survey was live from mid-August to mid-November 2024. A total of 6 businesses were removed from the initial sample for various reasons:

- 4 emailed the evaluators to opt out of the survey
- one emailed the evaluators stating that they had ceased exporting
- one emailed the evaluators stating they had ceased operations

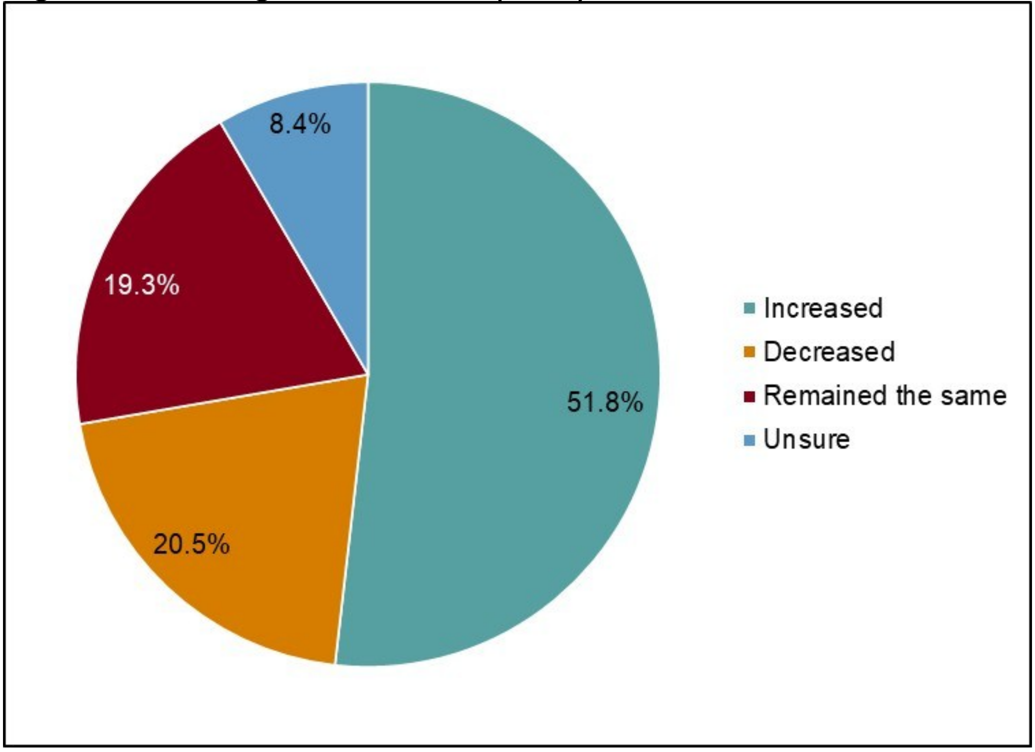
Following these adjustments, the contact list reduced to 2,022 businesses, with 110 responses in English and one in Welsh, resulting in a 5.5% response rate. An additional 99 partial responses were received; however, due to incomplete data, these were classified as non-responses and excluded from the analysis.

6.2. Analysis of non-beneficiary survey responses

This chapter presents findings from the non-beneficiary survey. Information regarding non-beneficiary business characteristics is provided in Annex F.

6.2.1. Business performance

Figure 6.1. Changes in turnover (n=83)



Source: Export support evaluation – non-beneficiary survey, 2024

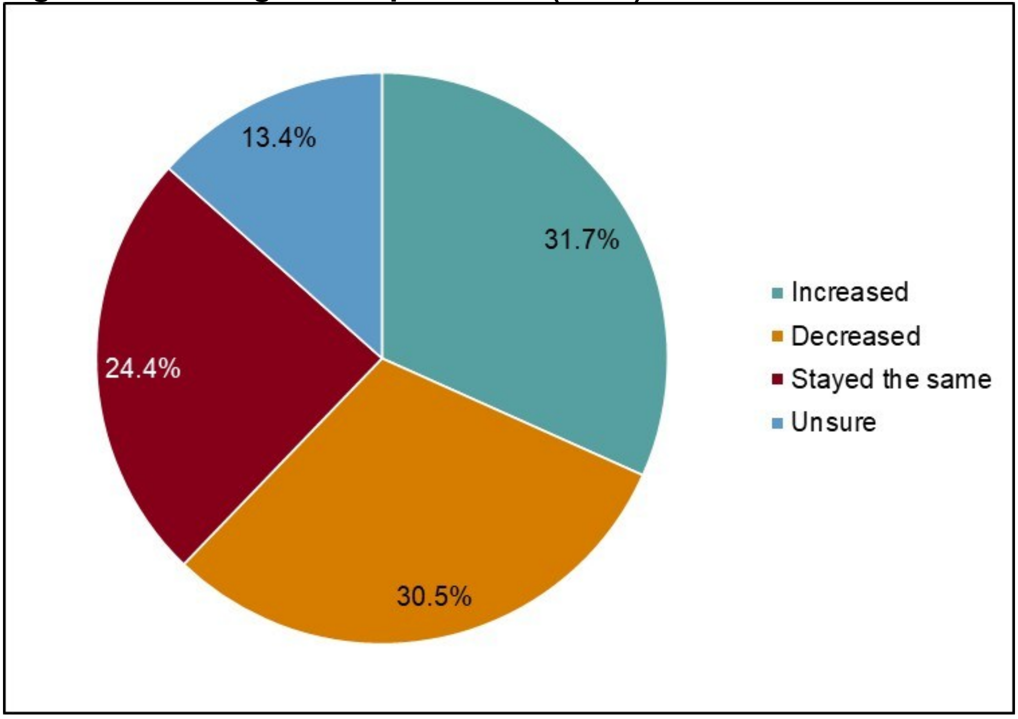
Respondents were asked about changes in their business turnover since they began exporting. As indicated in Figure 6.1, 51.8% (43) reported that their turnover had increased since they began exporting, 20.5% (17) reported a decrease, and 19.3% (16) said turnover had remained the same.

Businesses were asked a follow-up question regarding the reasons behind the change in turnover. In response, 45.5% (n=35/77) cited increased market demand, 39.0% (n=30/77) noted an enhanced product or service offering, and 39.0% (n=30/77) attributed it to expansion into new markets. A further 28.6% (n=22/77) identified marketing and promotion as contributing factors. Qualitative comments were also left by several respondents.

Qualitative feedback

33.8% (n=26/77) identified “other” factors, which included EU-exit, the Covid-19 pandemic, price increases, and wider geopolitical and economic fluctuations.

Figure 6.2. Changes in export sales (n=82)



Source: Export support evaluation – non-beneficiary survey, 2024

Figure 6.2 shows that, when asked about how their export sales had changed since they had begun exporting, 31.7% (26) reported an increase, while 30.5% (25) reported a decrease. A further 24.4% (20) said their export sales had stayed the same, while 13.4% (11) were unsure. Six respondents provided qualitative feedback.

Qualitative feedback

Six respondents commented that EU-exit impacted their export sales negatively due to tax increases, supply-side cost increases and loss of EU customers.

6.2.2. Money invested in exporting activities

Respondents were asked how much money they invested in exporting activities (such as market research, trade missions and marketing) in the past year: of the 50 that answered, 52.0% (26) had allocated no money towards exporting activities during that period; 16%) (8) allocated up to £10,000; 18% (9) allocated between £10,000 and £20,000, and 14% (7) allocated over £20,000, with the highest investment in exporting activities being £200,000. Several respondents provided qualitative comments.

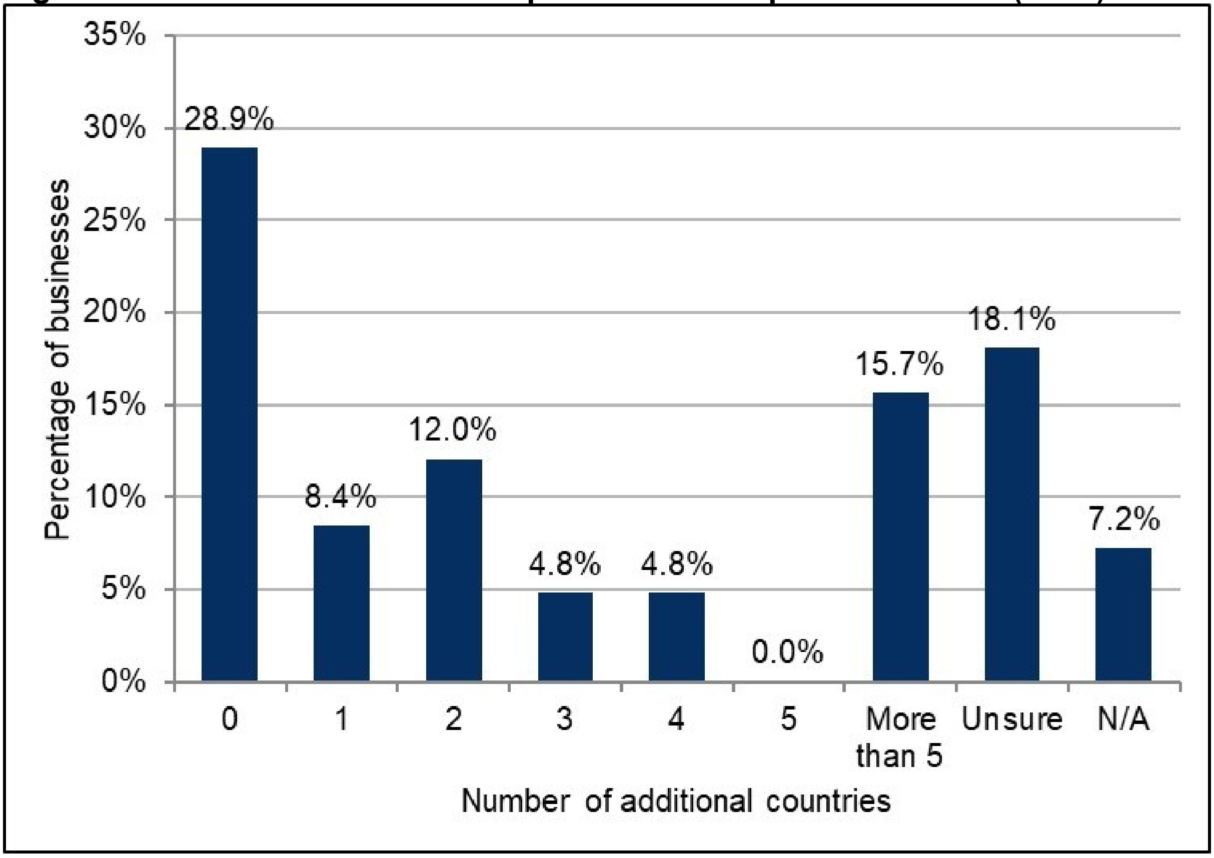
Qualitative feedback

Several respondents commented that they had made targeted investments in trade events and marketing, with 5 providing examples such as attendance at sector-specific exhibitions or direct investment in promotional activity.

Four respondents reported substantial investments in market research and development, with one business estimating £100,000 in spending across its UK commercial and R&D teams.

Six respondents reported that they had made no recent investment in exporting due to challenges linked to the UK's exit from the EU – such as increased paperwork, regulatory burdens, and diminished commercial viability, which for some reduced the incentive to pursue international trade.

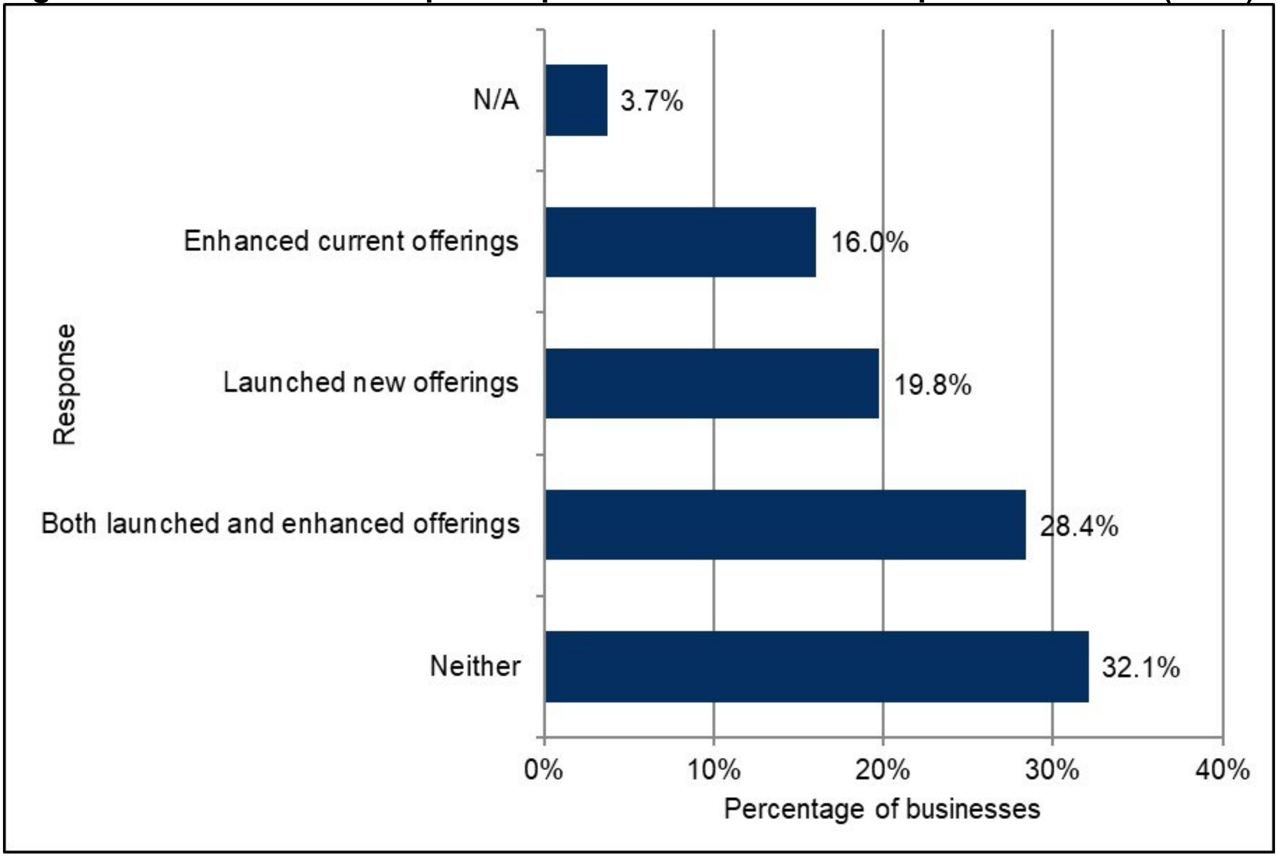
Figure 6.3. Additional countries exported to in the past 24 months (n=83)



Source: Export support evaluation – non-beneficiary survey, 2024

Respondents were asked if they had exported to any additional countries in the past 24 months. As Figure 6.3 shows, 28.9% (24) reported no expansion into new markets, while 15.7% (13) reported exporting to more than 5 additional countries, highlighting that a subset of respondents have actively pursued global market growth. 12.0% (10) entered two new markets, 8.4% (7) entered one, and 4.8% (4) each entered 3 or 4 new countries. A full list of new countries exported to by non-beneficiaries is set out in Annex I.

Figure 6.4. Introduced or improved products/services in the past 24 months (n=81)



Source: Export support evaluation – non-beneficiary survey, 2024

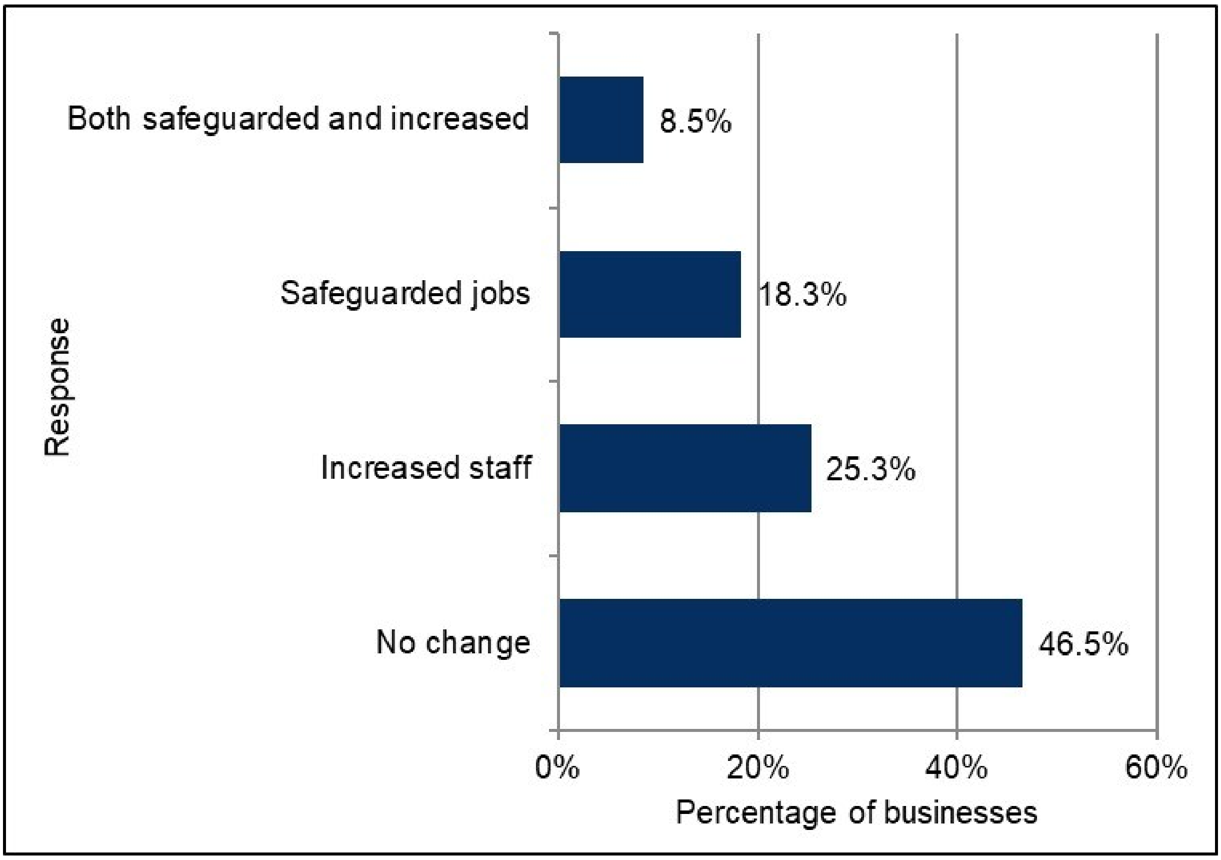
Respondents were asked whether they had launched or enhanced products and services in the past 24 months. As shown in Figure 6.4, 19.8% (16) launched new offerings, while 16.0% (13) focused on enhancing current offerings. A further 28.4% (23) did both. 32.1% (26) made no changes, suggesting that a substantial portion maintained their existing product lines. Several qualitative comments were provided.

Qualitative feedback

Qualitative comments from respondents indicate diverse activities, including developing new musical instruments for export, enhancing switchgear for international markets, and expanding product ranges to address rising delivery costs.

Others noted that their products remained unchanged due to their specialised nature.

Figure 6.5. Increased number of employees and/or safeguarded jobs in the past 24 months (n=71)



Source: Export support evaluation – non-beneficiary survey, 2024

Respondents were asked whether they had increased employee numbers or safeguarded existing jobs in the past 24 months. As Figure 6.5 reveals, 25.3% (18) reported that they had increased staff, 18.3% (13) had safeguarded jobs, and a further 8.5% (6) had done both. In contrast, 46.5% (33) indicated that there had been no change in employment during this period.

Tabes 6.1 and 6.2 provide a breakdown of the number of new hires and safeguarded jobs reported by respondents, broken down by business size.

Table 6.1. Number of new hires reported by respondents in the past 24 months (n=23)

New Hires	Number of respondents	Percentage of respondents
1-5	14	61.0
10-19	4	17.0
20-49	3	13.0
50-100	1	4.3
>100[footnote29]	1	4.3

Source: Export support evaluation – non-beneficiary survey, 2024

29 One respondent reported 1,500 new hires, which significantly exceeds all other responses and likely reflects group-level or international recruitment rather than direct hires in Wales. This outlier has been grouped in the "100+" category for reporting purposes.

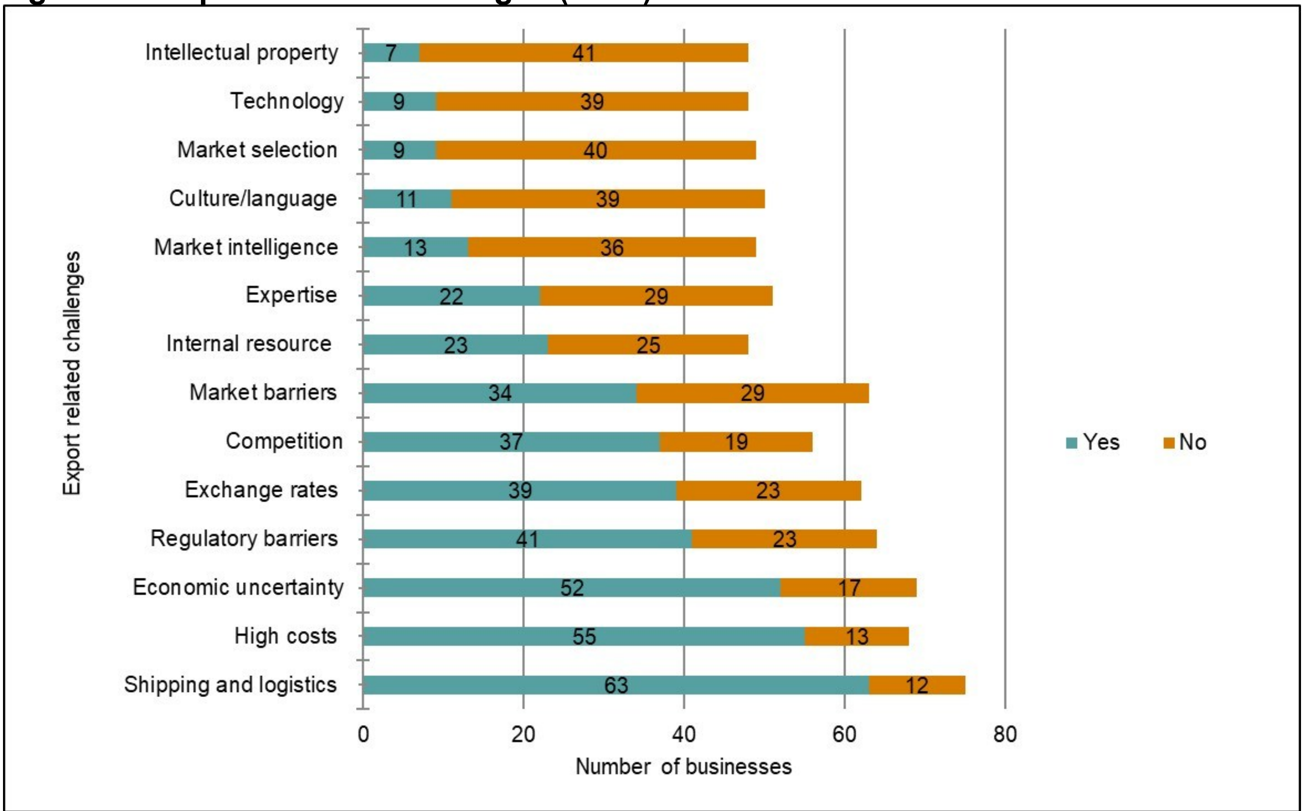
Table 6.2. Number of jobs safeguarded by respondents in the past 24 months (n=31)

Jobs safeguarded	Number of respondents	Percentage of respondents
1-5	15	48.4
10-19	6	19.4
20-49	6	19.4
50-100	3	9.7
>100[footnote 30]	1	3.2

Source: Export support evaluation – non-beneficiary survey, 2024

6.2.3. Export challenges

Figure 6.6 Export related challenges (n=83)



Source: Export support evaluation – non-beneficiary survey, 2024

Figure 6.6 shows that when asked about export-related challenges, the top challenges counted were shipping and logistics issues (63), high costs (55) and economic uncertainties such as Covid-19 or EU-exit (52). These were followed by regulatory barriers (41), unfavourable exchange rates (39), competition in international markets (37) and market (country) barriers (34). Fewer respondents cited internal challenges such as internal resource constraints (23) and limited internal expertise (22) as challenges they experienced.

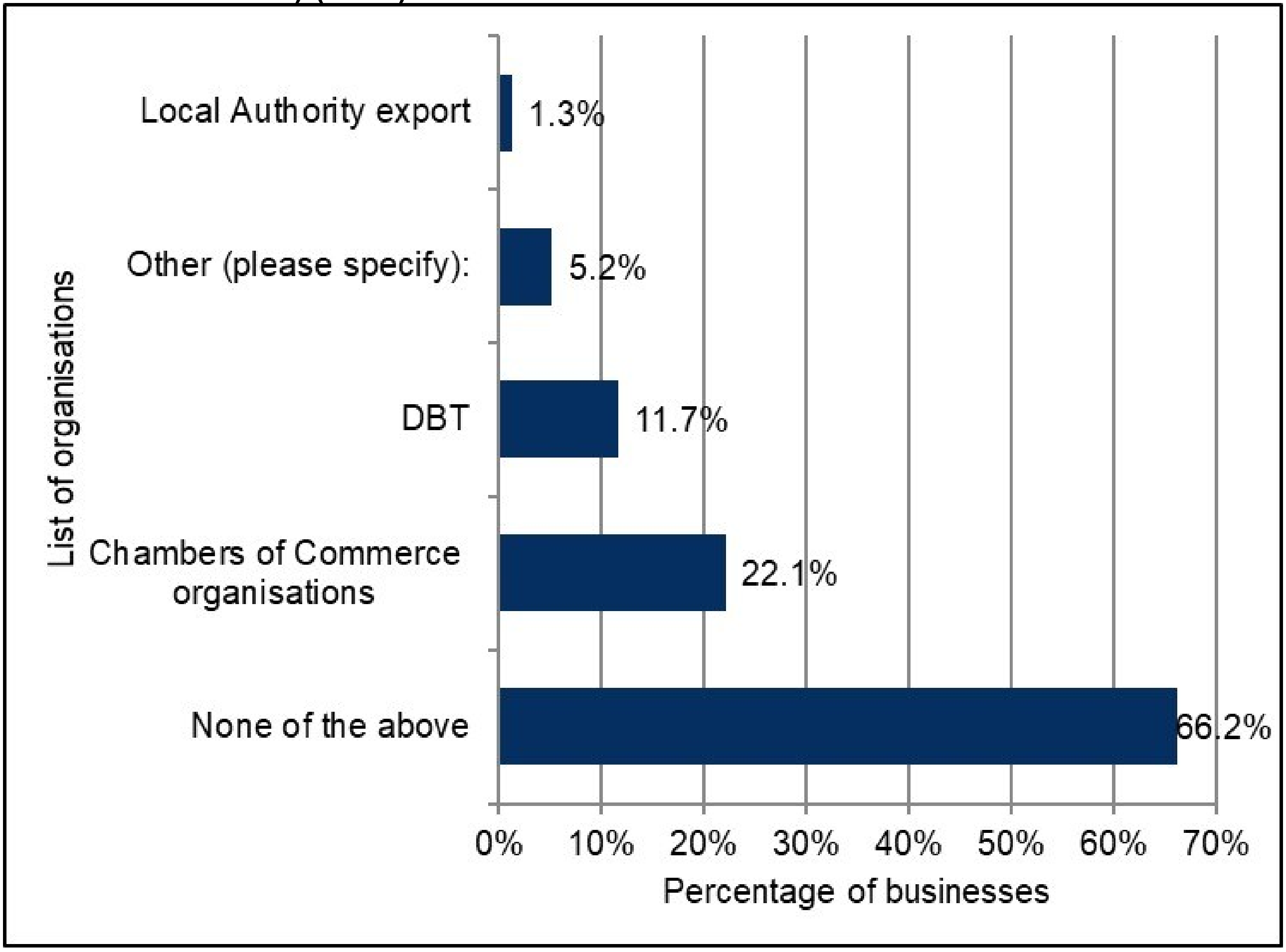
30 One respondent reported safeguarding 820 jobs, significantly higher than other responses. This figure has been grouped in the ">100" category and may reflect the size of the business or group-level reporting.

Qualitative feedback

Additional qualitative comments highlighted the significant impact of EU-exit on exporting to the EU, specifically referencing the difficulty of customs paperwork, changes in legislation between the UK and EU, technical specification requirements from the EU and a lack of financial support for exporting.

6.2.4. Other export support

Figure 6.7. Respondents who sought export support from organisations (excluding Welsh Government) (n=77)



Source: Export support evaluation – non-beneficiary survey, 2024

Respondents were asked whether they had sought financial or advisory export support from Chambers of Commerce organisations, the UK Government DBT, or their Local Authority. Figure 6.7 indicates that 66.2% (51) had not sought support from any listed organisations. Among those who did, 22.1% (17) approached Chambers of Commerce organisations, 11.7% (9) sought support from the DBT, and 1.3% (1) sought assistance from their local authority. 5.1% (4) selected “Other” and specified that they had sought support from: UK Export Finance and the Investment Fund for Wales; M-Sparc; Welsh Government, [footnote31]

31 Note: For the purposes of this evaluation, non-beneficiaries were defined as businesses that had not received support from one of the Welsh Government’s core export support programmes between 2017 and 2024. It is possible that some businesses accessed Welsh Government support outside of this timeframe or through non-export support core programmes or through support offered outside of the WG export support. Do

and Business Wales. Qualitative comments from respondents reflected various experiences with past attempts to access non-WG export-related support.

Qualitative feedback

Three respondents acknowledged positive outcomes from recent match-funded investments as beneficial to their operations.

Five reported specific difficulties such as lack of follow-up, unclear advice, or challenges navigating eligibility criteria.

Two noted more general difficulties in identifying or accessing support they felt was relevant to their needs. These comments referred to a range of experiences but did not consistently identify the organisations involved.

A small number of respondents highlighted barriers to support linked to eligibility criteria.

Three stated that when seeking support in areas such as product development, certification testing, or regulatory advice, they encountered limited availability of services aligned to those needs.

Two noted that they had been offered loans rather than grants, which they felt did not provide sufficient advantage over commercial financing.

Four respondents noted that they relied on private sector advisers, such as accountants and VAT specialists, for EU-exit related training and documentation support, rather than receiving guidance from government sources.

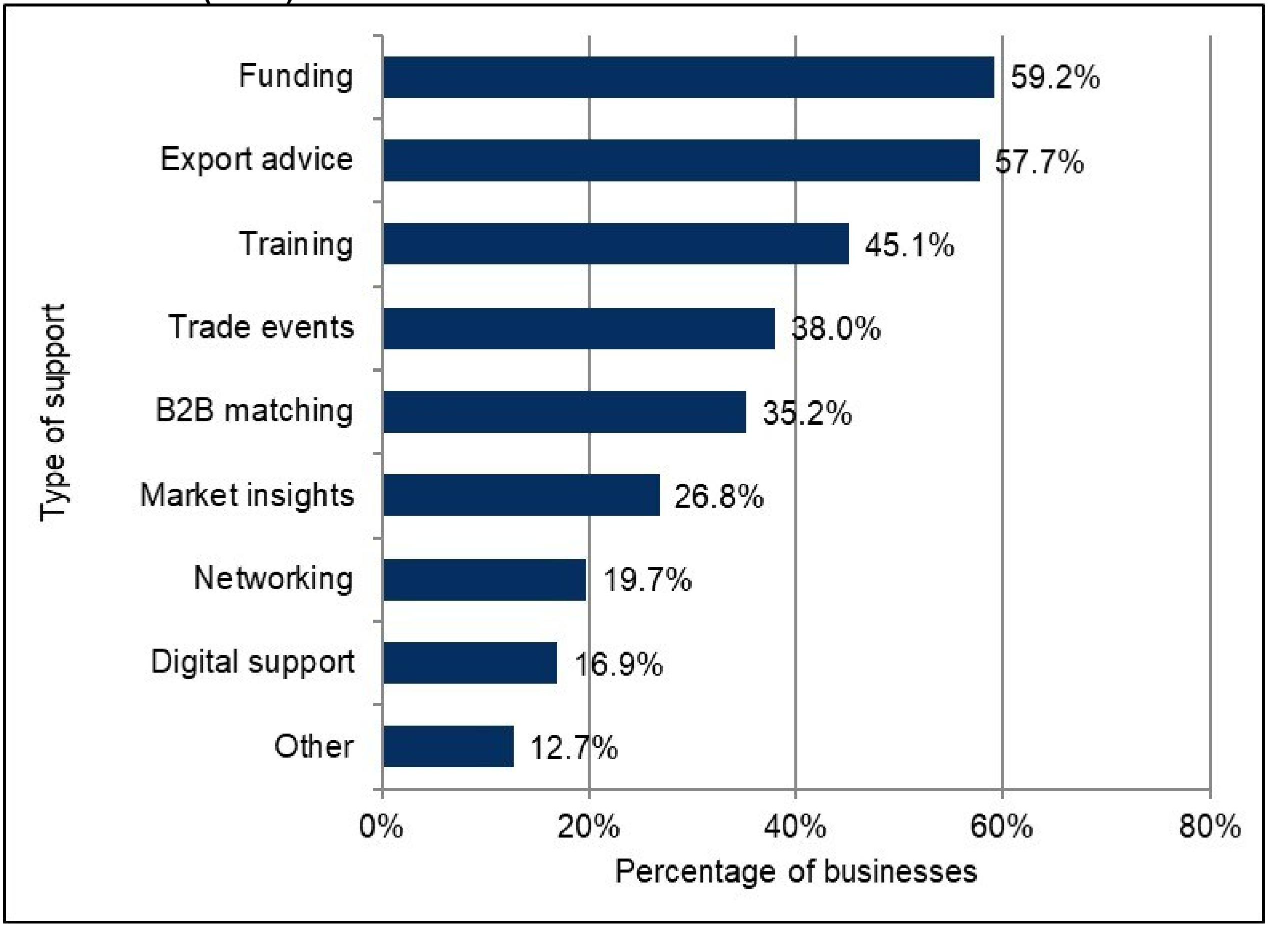
Lastly, 3 respondents raised concerns relating to export documentation and regulatory processes following EU-exit. They described uncertainty during the transition to new customs systems and processes

6.2.5. Interest in Welsh Government support and future outlook

When respondents were asked if they were aware that the WG offers export support programmes to Welsh businesses, 50.6% (n=42/83) were unaware.[footnote32] Of these respondents, 64.3% (n=27/42) stated they would have sought WG export support if they had known.

[32] Of those that were unaware of the Welsh Government export support, 64% (27) were Micro-sized businesses, 22% (9) were Small, 11% (5) were Medium, and 2.4% (1) were Large.

Figure 6.8. Type of export support respondents would seek from the Welsh Government (n=71)



Source: Export support evaluation – non-beneficiary survey, 2024

As shown in Figure 6.8, the most commonly selected types of support respondents would have sought from WG were financial support, selected by 59.2% (42), and export advice, selected by 57.7% (41). This was followed by training, selected by 45.1% (32), trade events, selected by 38.0% (27), business-to-business matching, selected by 35.2% (25) and market insights, selected by 26.8% (19). Several respondents provided additional qualitative comments.

Qualitative feedback

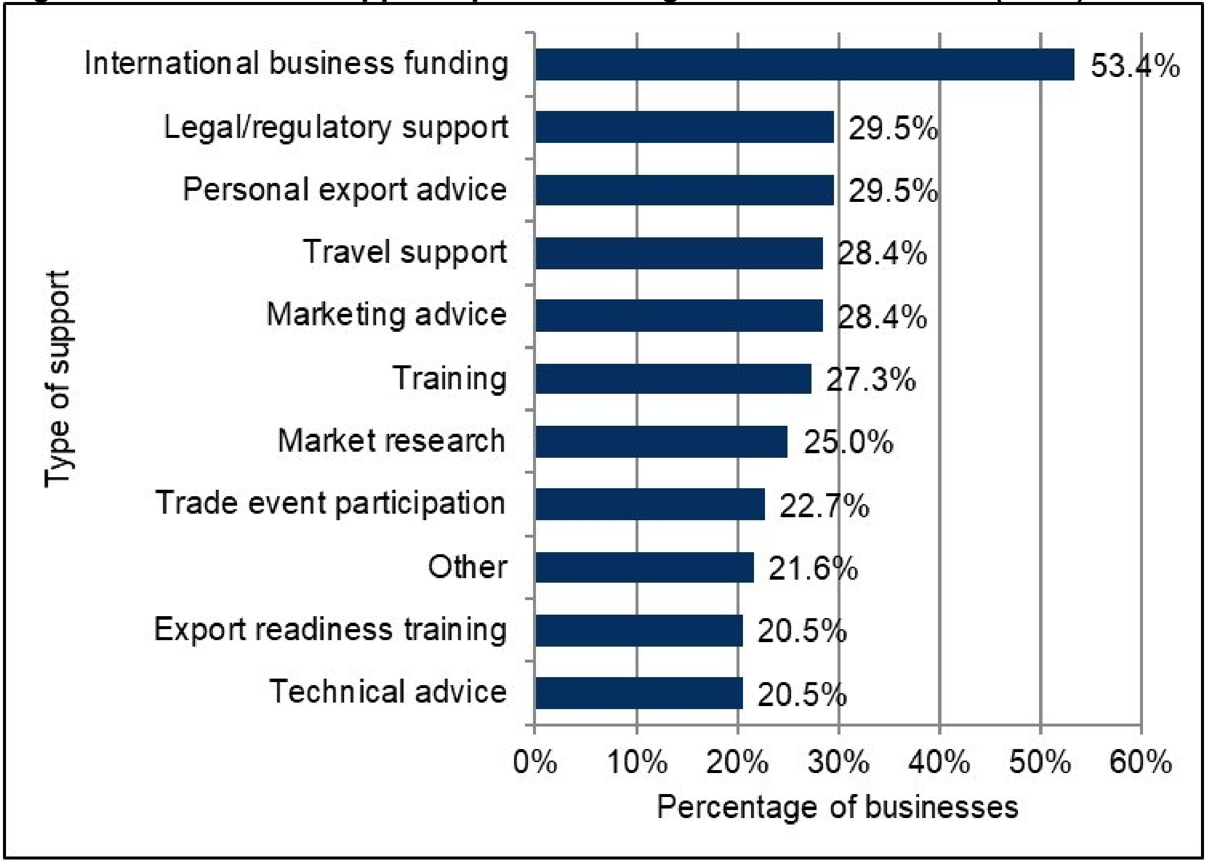
Of the 12.7% (9) who answered "Other", qualitative comments included that they would not seek support from WG or had previously accessed support at the start of the exporting journey and no longer needed it.[footnote33] One business commented that 65% of their company shareholders did not reside in the UK, which they believed disqualified them from accessing export support.[footnote34] Three respondents commented they would have sought support for paperwork and understanding regulations for exporting.

33 Two respondents noted that they had received WG export support during the early stages of their operations. While this means they were 'beneficiaries', the support was provided prior to the 2017–2024 evaluation period. As such, they are classified as non-beneficiaries for the purposes of this research.

34 It is important to note here that shareholder domicile is not an eligibility criterion for WG export support. Businesses with operations in Wales are eligible to receive support, regardless of ownership structure.

When asked why they might not have sought WG export support, 2 respondents stated they had sufficient internal resources to manage their exporting needs. Two others believed that the support would not meet their needs, and one noted that their product was very ‘niche and expensive’ which meant that they did not export on a regular basis.

Figure 6.9. Preferred support options amongst non-beneficiaries (n=88)



Source: Export support evaluation – non-beneficiary survey, 2024

Respondents were asked what types of support they would find most beneficial to aid in expanding their export activities. As indicated in Figure 6.9, 53.4% (47) cited funding for international business development. This was followed by legal and regulatory assistance with 29.5% (26), and personal exporting advice 29.5% (26). 28.4% (25) cited marketing advice, and 28.4% (25) also selected travel support.

Other forms of possible support included training and workshops with 27.3% (24), market research support with 25.0% (22), international market event participation with 22.7% (20) preparing to export training with 20.5% (18) and expert technical advice with 20.5% (18). While there may be some conceptual overlap between “training and workshops” and “preparing to export” training, the latter is understood to refer more specifically to tailored support for new or inexperienced exporters. 21.6% (19) selected “Other” and provided qualitative comments.

Qualitative feedback

Seven respondents stated they would not benefit from any export support.

Three respondents highlighted the need for finance and asset funding support, including affordable loans and export funding guarantees to reduce financial risks.

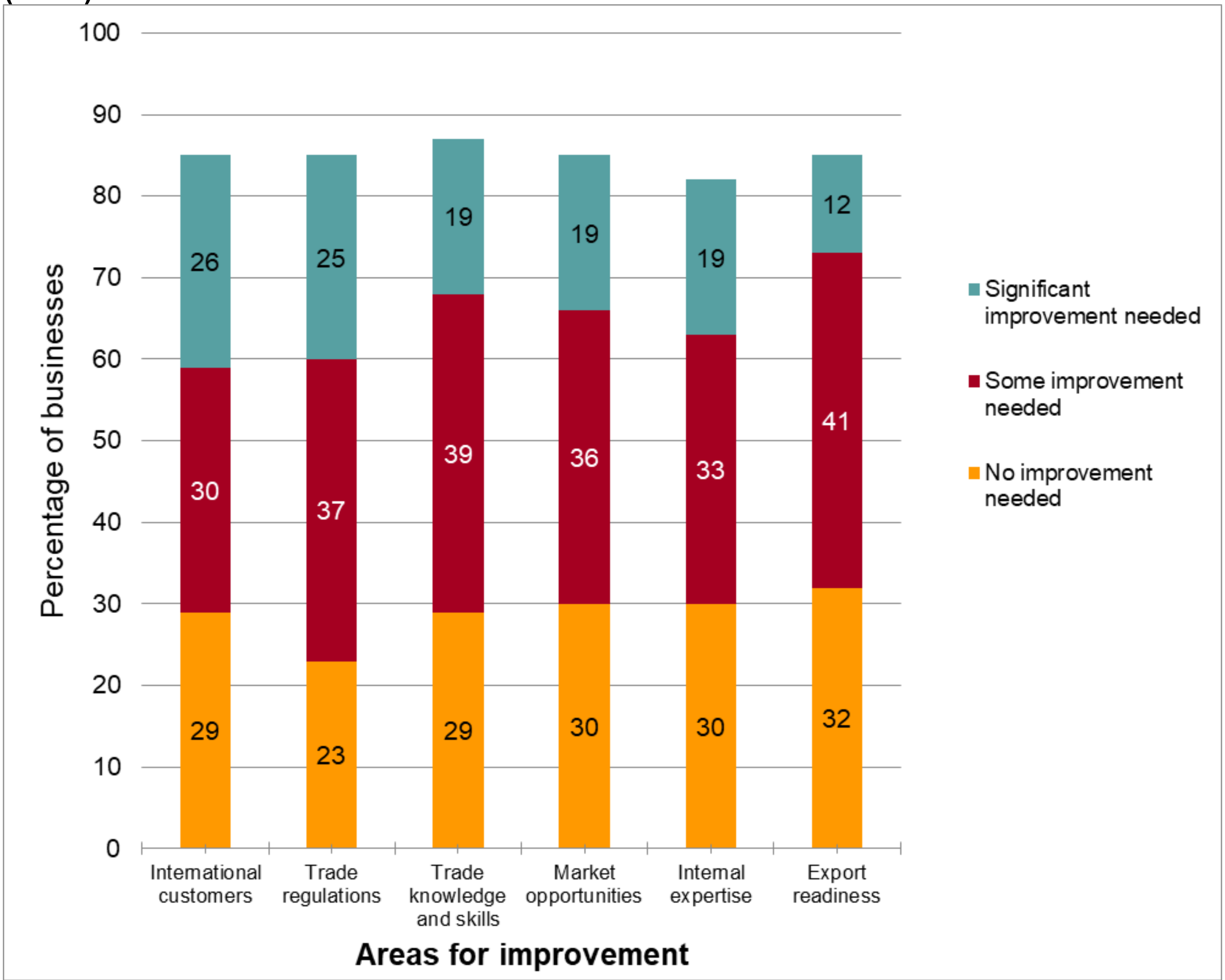
Three respondents proposed clearer regulatory and certification guidance on shipping, customs, VAT, and compliance with overseas standards, particularly for chemicals.

Two respondents noted the need for training and skills development, including practical export process training, language support for international engagement, and support for attending overseas exhibitions.

Two respondents identified export market research and business strategy support as a priority, expressing interest in government-backed research and expert guidance on international market entry and expansion.

One respondent cited technical specifications, as was sector-specific recognition of UK food standards in overseas markets, and more guidance on temporary import/export regulations.

Figure 6.10. Areas requiring improvement to enhance business's export activities (n=91)



Source: Export support evaluation – non-beneficiary survey, 2024

Respondents were asked to identify the areas in which their business needed to improve in order to enhance their export activities. Figure 6.10 shows that the most commonly identified area was connecting with international customers (26), followed closely by trade regulations (25), while trade knowledge and skills, market opportunities, and internal export expertise were each identified by 19 respondents. The area with the lowest number of respondents indicating significant improvement was export readiness (12). This suggests that while many businesses are progressing in their export development, a core group continue to face substantial challenges in reaching international customers, understanding regulatory requirements, and building the internal capabilities necessary for successful exporting.

6.3. Comparative insights: beneficiaries and non-beneficiaries

This subchapter draws on selected questions from the beneficiary and non-beneficiary surveys to present high-level comparisons between the 2 groups. While these comparisons offer useful insight into how export outcomes, challenges, and support needs differ between businesses that received WG export support and those that did not, there are important limitations that should be noted.

Above all, given that the evaluation was commissioned and undertaken retrospectively, i.e. after the interventions had been implemented, it was not possible to design and embed a robust evaluation framework from the outset, including the collection of baseline data. The samples used in this study were self-selected and drawn from discrete contact lists (as outlined in Chapter 2), rather than through randomised assignment. As such, beneficiary and non-beneficiary groups may differ on important unobserved characteristics (including motivational factors underlying participation of the beneficiary group in WG export support programmes).

These limitations constrain the ability to apply more rigorous causal inference methods within the scope of this report. As such, the findings presented below should be interpreted as indicative rather than causal, with observed associations reflecting descriptive patterns rather than robust correlation. However, further analysis, such as through post-hoc application of a quasi-experimental design, could be explored to strengthen the assessment of potential impacts, subject to data screening and assessment of methodological feasibility.

6.3.1. Export performance

Export performance was a central outcome measure in both surveys. Among supported businesses, 63.4% (n=78/123) reported an increase in turnover since receiving WG export support. In comparison, 51.8% (n=43/83) of non-beneficiaries reported turnover growth since they started exporting, a timeframe that in some cases may span years or even decades. Although the reference periods differ, the higher proportion of growth among beneficiaries suggests that support may indicate a potential association between programme participation and turnover worthy of further investigation.

A similar pattern was observed in relation to export sales. Among beneficiaries, 60.0% (n=72/120) reported growth in export sales during 2017–2024. Among non-beneficiaries, 31.7% (n=26/82) reported growth since 2016 or the year before they began exporting — whichever was later. Although the timeframes are not directly aligned, the data suggests a possible real difference in outcome which would be worthy of further investigation, pointing towards the possibility that WG export support helped sustain and expand export revenue streams.

6.3.2. Employment impact

Both groups were also asked about the employment effects of developing their exporting activities. Among beneficiaries, 43.8% (n=46/105) reported that WG support helped them safeguard jobs, 17.1% (n=18/105) noted it enabled job creation, and 12.4% (n=13/105) reported both. Overall, 73.3% (n=77/105) of respondents experienced employment impacts they directly attributed to WG support.

Among non-beneficiaries, 25.3% (n=18/71) reported job creation, 18.3% (n=13/71) reported safeguarding roles, and 8.5% (n=6/71) reported both. In total, 52.1% of non-beneficiaries reported employment changes, compared to 73.3% of beneficiaries, where changes were linked explicitly to WG export support. While these findings suggest a potential association between WG export programmes and employment stability and growth—especially among internationally active SMEs—this should be interpreted with caution, as the analysis does not establish a causal link for the reasons outlined at the beginning of this chapter.

6.3.3. Market expansion and diversification

Export diversification was assessed through questions on expansion into new international markets. Among beneficiaries, 44.0% (n=37/84) entered one to three new markets, 3.6% (3) expanded into 4 to 5 markets, and 11.9% (10) expanded into more than 5. Qualitative feedback often attributed this growth to structured support mechanisms, including attendance at trade missions and OBDVs. 31.7% (38) noted that they had exported to 0 additional countries.

Among non-beneficiaries, 25.3% (n=21/83) had entered 1 to 3 new markets, while 4.8% (4) had expanded into four to five markets, and 15.7% (13) had expanded into more than 5. 28.9% (24) reported they had exported to no additional countries in the past 24 months.

Although a greater share of non-beneficiaries entered more than 5 markets, 44.0% of expansion among beneficiaries clustered around 1 to 3 markets — a level often considered a significant strategic milestone. This more concentrated pattern among beneficiaries may reflect targeted and phased approaches encouraged by WG support. In contrast, the more distributed pattern seen among non-beneficiaries could indicate organic, less structured diversification. However, these findings should be interpreted as indicative rather than definitive, given the limitations in comparability and attribution.

6.3.4. Product and service innovation

When asked whether they had introduced new products or services, improved existing ones, or done both, 60% (n=57/95) of beneficiary respondents said yes, attributing these changes directly to insights gained through WG support (e.g. from buyer/customer engagement on trade visits or adapting to new market requirements).

When asked the same question, 64.2% (n=52/81) of non-beneficiary respondents reported that they had introduced new products or services, improved existing ones, or done both. While this is a slightly higher rate, these changes were not linked to any specific external support. This may suggest that innovation is a broader feature of export-active businesses, regardless of programme participation. However, the direct attribution among beneficiaries points to a potential added value in how public support can shape or enhance the innovation process. As with other findings in this section, this relationship should be interpreted cautiously, as the analysis does not establish a definitive causal link.

6.3.5. Future support needs

Both surveys asked what types of export support businesses would find most beneficial moving forward. Non-beneficiaries were directly asked to identify the support they would find most useful to expand their export activity, while beneficiaries provided input through qualitative survey comments and follow-up interviews, reflecting on gaps in provision and unmet needs.

Among non-beneficiaries, the top priorities were funding for international business development with 53.4% (n=47/88), legal and regulatory assistance and one-to-one exporting advice, both with 29.5% (n=26/88), and expert marketing advice with 28.4% (n=25/88). Responses reflected a need for accessible, practical, and foundational support. In contrast, feedback from beneficiaries highlighted the importance of more tailored and sector-specific assistance, especially in highly regulated industries. Beneficiaries also called for greater flexibility in funding mechanisms, and improved referral and signposting processes.

While not directly comparable due to differences in question format, the responses from both groups highlight a consistent demand for more personalised, flexible, and sector-informed support. Non-beneficiaries tended to express a need for core services such as finance, regulatory help, and foundational export advice. In contrast, beneficiaries, having already accessed basic support, tended to emphasise the need for deepening and refining provision to better meet the complex needs of mature or niche exporters.

6.4. Comparative reflections on seeking export support

While only beneficiaries were asked directly about what they would have done without WG support, responses from non-beneficiaries allow for a thematic comparison. Among beneficiaries, many respondents indicated that their export activity would have been significantly delayed, reduced in scale, or not pursued at all in the absence of WG support. Others reported that they would have attempted to access alternative sources of assistance, albeit at greater cost or risk. These self-reported responses suggest a perceived degree of programme additionality, though this should be interpreted cautiously given the lack of a direct counterfactual from non-beneficiaries.

In contrast, 66.2% (n=51/77) of non-beneficiaries reported that they had not sought export support from any organisation, highlighting a gap in support-seeking behaviour. Among those who were unaware of WG support, 65.9% (n=27/41) said they would have accessed it had they known it was available, indicating latent demand for export support within the non-beneficiary group, and reinforcing the importance of improving outreach and visibility of WG programmes.

Taken together, findings suggest that WG support may not only accelerate or expand export activity among beneficiaries, but also fill a critical gap in the wider support ecosystem. The fact that so few non-beneficiaries had accessed any form of support, despite reporting barriers to growth, points to opportunities for further programme promotion among existing and potential exporters in Wales.

6.4.1. Barriers to exporting

Both groups identified similar export barriers, but their experiences differed. Among non-beneficiaries, the most commonly cited challenges included shipping and logistics (63 respondents), high costs (55), economic uncertainties (52), and regulatory barriers (41). Qualitative comments emphasised EU-exit-related difficulties and a lack of accessible advice.

Beneficiaries echoed many of these themes but also reported ways in which WG support had partially mitigated them — for example, funding for trade missions, or guidance through the ITD and ITO programmes. However, some felt the support could be more responsive and better aligned to their sector.

The findings suggest that core barriers to export growth, such as cost, complexity, and regulatory friction, were broadly shared across both groups. For beneficiaries, these challenges were sometimes alleviated by support, but not always fully addressed. For non-beneficiaries, the lack of engagement with support may have left them more exposed to these obstacles.

6.4.2. Summary of comparative findings

While caution is warranted due to differences in sample composition and question design, the comparative findings suggest that WG export support contributes meaningfully to export growth, innovation, and employment stability. Beneficiaries tended to report positive outcomes across nearly all metrics examined, and more importantly, to attribute those outcomes to structured public support.

At the same time, the non-beneficiary survey revealed significant latent demand for support, especially among businesses that have not previously engaged with WG or other providers. These insights underscore the importance of targeted outreach, tailored service delivery, and a more inclusive export support ecosystem to unlock wider international potential across Wales’ business base.

It is also important to acknowledge that while targeted outreach and inclusive support structures are already in place, some non-beneficiaries appear to be either disengaged by choice or operating effectively without external assistance—suggesting that, for certain firms, market mechanisms are functioning well without the need for intervention. These insights highlight the importance of maintaining a responsive and proportionate support offer: one that continues to reach those with unmet needs while recognising that not all businesses require or seek government involvement.

7. Perceived additionality assessment

Chapter 7: Perceived additionality assessment summary

Barriers to exporting without WG support
11 beneficiary businesses stated they would not have exported at all or would have faced significant difficulties without WG support. Major barriers identified included:

- Lack of knowledge and confidence.
- Limited access to market intelligence and contacts.
- Financial constraints.

Slower export growth without support
Even among businesses that believed they would have pursued exporting independently, 8 felt that their growth would have been much slower. Specific impacts included:

- Delayed or prevented entry into important markets.
- Fewer international connections.
- Reduced business growth.

Impact on trade show participation and networking
Several businesses (7) stated they would not have attended international trade shows without WG support due to cost constraints. The absence of support would have negatively affected their ability to:

- Find and secure new clients.
- Stay competitive – trade shows enabled businesses to keep up with industry trends and technological advancements.
- Build credibility and market presence.

Likelihood of exporting without WG support
- 52.1% (63) of businesses believed they would have exported regardless, and12.4% (15) stated they would not have pursued exporting without WG support.
- Among businesses uncertain about exporting independently, 64.0% (16) were unsure when they would have started exporting, while 28.0% (7) estimated delays of between 1 to 5 years. 8.0% (2) stated they would never have exported.

7.1. Introduction

The concept of 'additionality' is necessary in understanding the unique impact of the core export support programmes and refers to the positive changes attributable to them, beyond what would have occurred in their absence. It assesses the net effect of these programmes by distinguishing between outcomes that businesses believed to have resulted from them and those that can be reasonably assumed would have happened anyway. In assessing additionality in this way, the evaluation aimed to arrive at an understanding of these programmes' added value.

This chapter provides a perceived additionality assessment of the 4 core export support programmes, exploring what business outcomes, both financial and non-financial, might have looked like in the absence of WG support. Drawing on qualitative insights from interviews with beneficiary businesses and beneficiary survey responses, the analysis evaluates the role of WG support in driving export growth, market expansion, and business development. It also identifies the potential barriers businesses might have faced in the absence of assistance and assesses whether businesses would have exported independently or sought support from alternative sources.

While based on subjective data, the chapter provides evidence in support of the conclusion that WG export support programmes are likely to have been effective in generating impact for beneficiary businesses. The final section of the chapter addresses some of the analytical challenges that need to be overcome to generate a robust assessment of the extent to which the programmes may reflect value for money.

7.2. Barriers to exporting without WG support

Eleven beneficiary businesses interviewed stated they would not have exported at all or would have struggled significantly without WG support. The most common barriers identified included:

Lack of knowledge and confidence: 9 businesses said they would not have known where to start or which markets to target. Without structured support, they would have felt apprehensive about entering new markets, and unsure of how to navigate regulatory requirements or international business processes on their own.

Limited access to market intelligence and contacts: 7 businesses noted they would have relied on LinkedIn and informal networks to find potential partners, which they felt would have been less effective than WG-supported introductions. They reported that without the WG support they would have lacked the local knowledge, regulatory insight, and market research needed to enter international markets successfully.

Financial constraints: 6 businesses stated that attending international trade shows, securing in-market consultants, and meeting potential buyers would have been prohibitively expensive without WG funding. They believed they would have missed major trade events that were instrumental in securing new customers.

7.3. Export growth and market expansion would have been slower

Even among beneficiaries who believed they would have still pursued exporting; 8 felt their growth would have been much slower and more limited. Businesses noted the following:

Delayed or missed entry into major markets: 5 businesses said they would not have entered specific countries, such as China, Kazakhstan, or Australia, without WG guidance and financial assistance.

Fewer international connections: 6 businesses reported that without WG support, they would have had a weaker understanding of global markets, fewer industry relationships, and less exposure to international trade opportunities.

Reduced business growth: 2 businesses described how WG support in one market had a domino effect in opening opportunities in other regions such as Germany, leading to expansion in the USA. One business, with only six customers prior to WG support, credited WG-supported trade shows with helping them grow into a multi-million-pound company with over 100 customers and 10 employees.

7.4. Impact on trade show participation and networking

Seven beneficiaries said they would not have attended international trade shows without WG support due to cost constraints. They believed this would have significantly impacted their ability to:

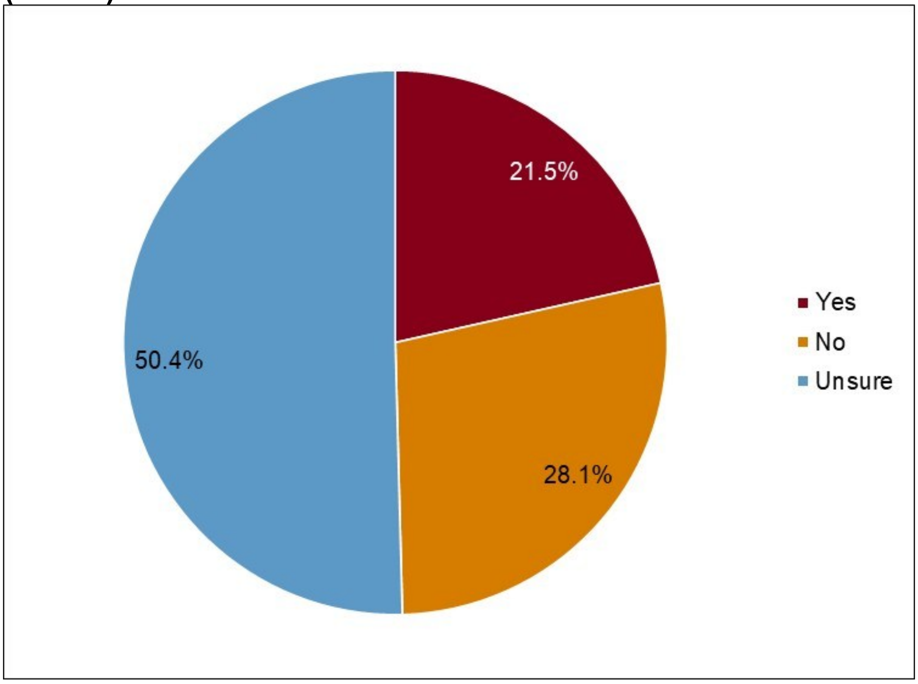
Find and secure new clients: 4 businesses felt that without WG-supported trade missions, they would have missed the chance to develop important customer relationships that were crucial to their export success

Stay competitive and up to date: 3 businesses noted that trade shows allowed them to keep up with industry trends and scientific developments, ensuring they remained competitive in their sector

Build credibility and market presence: 2 businesses stated that attending events helped them enhance their reputation in international markets. Without this, they would have had to work harder and take longer to establish themselves globally

7.5. Alternative support

Figure 7.1. Percentage of beneficiaries that would have sought alternative support (n=121)



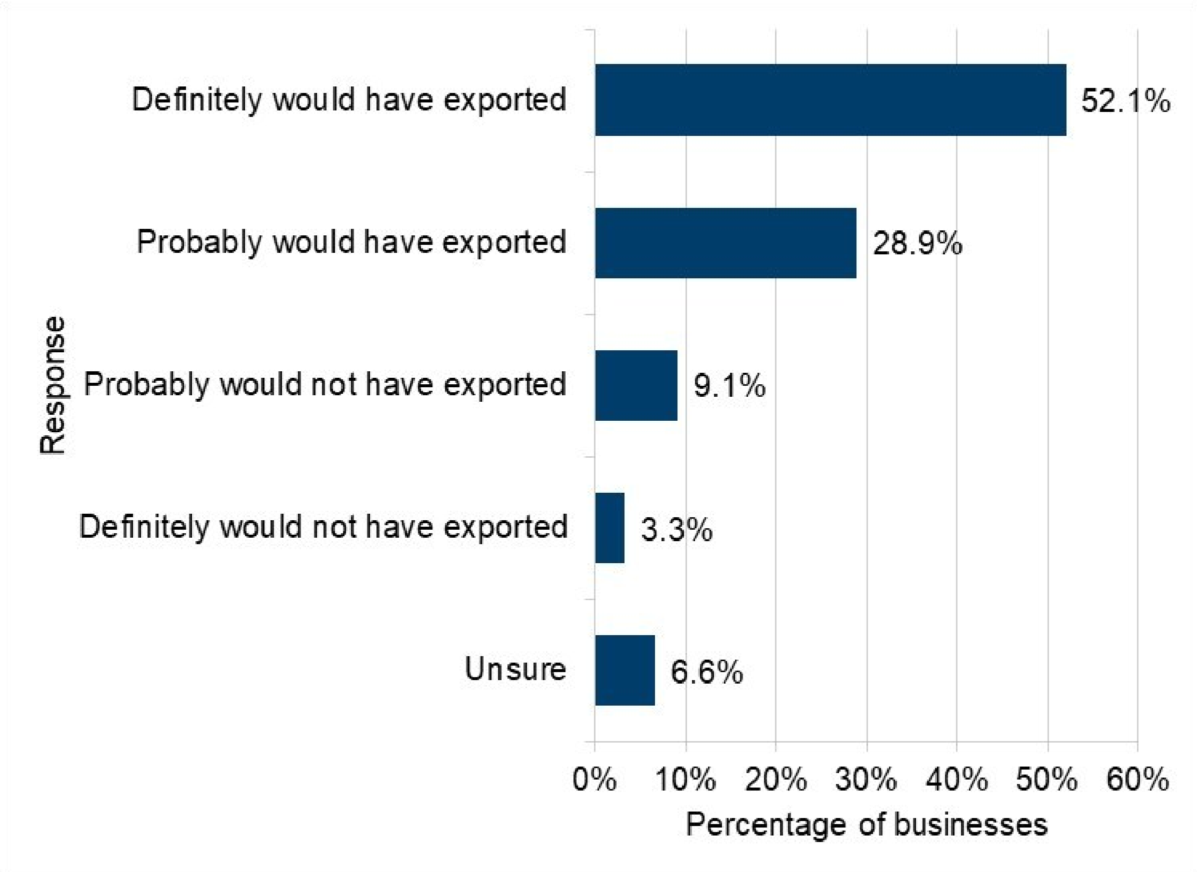
Source: Export support evaluation – non-beneficiary survey, 2024

Surveyed beneficiary businesses were asked whether they would have sought alternative export support to assist in achieving their export goals. The pie chart in Figure 7.1 indicates that 50.4% (61) were unsure, while 28.1% (34) noted they would not have looked elsewhere. 21.5% (26) reported they would have considered alternative support.

Among those who would have looked elsewhere, the most common organisations noted were Chamber of Commerce organisations, the DBT, the FSB, and Innovate UK. Other mentions included the Enterprise Europe Network (EEN), the Association of British HealthTech Industries (ABHI), the North Wales Exporters Club, UK Interactive Entertainment (UKIE), and private consultants.

7.6. Businesses that would have struggled to export

Figure 7.2. Likelihood of exporting without WG support (n=121)



Source: Export support evaluation – non-beneficiary survey, 2024

Beneficiaries were asked whether they would have exported without Welsh Government support. Figure 7.2 shows 52.1% (63) of respondents stated they definitely would have, and 28.9% (35) said they probably would have.

In contrast, 9.1% (11) reported they probably would not have exported without support, while 3.3% (4) said they definitely would not have. 6.6% (8) were unsure whether they would have pursued exporting independently.

7.7. Challenges in assessing programme benefits

For the purposes of ongoing programme monitoring, the Welsh Government Export Team currently reports a ratio of export value to direct programme costs. The programme costs typically include marketing, events, and the cost of support provided to businesses. The figure for export value represents the gross value of new export deals which beneficiary businesses self-report as attributable to WG export support. This is identified through regular follow-up with businesses who participated in the core export support programmes. This ratio provides a valuable indication of programme activity and performance within and across financial years.

Between 2017–18 and 2024–25, businesses that participated in core export support programmes reported export deals totalling £455.5 million. Over the same period, direct programme costs amounted to £22.2 million, yielding a ratio of gross export value to direct programme costs of 20.5. This figure offers a useful, high-level view of aggregate outcomes from the four core support programmes across the evaluation period and reflects the scale of reported export activity.

However, further analysis is recommended to establish the programmes' value for money and benefit cost ratio (BCR) in accordance with HM Treasury Green Book and the Magenta Book principles. For this, a broader range of factors – lying beyond the scope of the present evaluation – would need to be considered. Above all, such analysis would need to address the question of attribution and causation, to account for the possibility that not all reported outcomes may be the direct result of programme support.

7.8. Final reflections

The perceived additionality analysis presented above indicates that the core export support programmes have played a potentially important role in helping Welsh beneficiary businesses to enter new markets, sustain export growth, and navigate international trade challenges more effectively than those without support. Without the support, many beneficiaries reported that they would have lacked the financial means, strategic insights, or global connections necessary for successful expansion of their exporting activity. While these self-reported accounts point to a potentially meaningful contribution from WG export support, as commented in Chapter 6 and subchapter 7.7 above, they should be interpreted as indicative rather than conclusive, given the absence of a formal counterfactual or causal analysis. Further analytical work is recommended to validate these indicative findings.

8. Conclusions

8.1. Introduction

This evaluation has assessed the impact of the core export support programmes delivered through the WG's ExAP, focusing on their role in supporting export growth, market expansion, and business development. Through a combination of survey data, qualitative interviews, case studies, and perceived additionality analysis, the findings demonstrate that the core export support programmes have played a substantial role in supporting businesses to access international markets, strengthen export capabilities, and secure trade deals.

The analysis highlights that many businesses have benefited from targeted financial and advisory support through the OVE, OBDV, ITO, and ITD initiatives. Among surveyed beneficiary businesses, 63.4% (n=78/123) reported increased turnover and 60.0% (n=72/120) reported increased export sales. While further analysis would be necessary along the lines set out in Chapters 6 and 7 to fully identify the net benefits of programme participation, 55.4% (n=67/121) of beneficiaries attributed gains in export sales and turnover to WG support. WG export support has also contributed to employment impacts, with many beneficiary businesses reporting both job creation and the safeguarding of existing roles.

However, findings also indicate that while one-to-one and in-market support were rated highly, 5 businesses found aspects of market intelligence and consultancy-led research to be less impactful. Additionally, sector-specific needs—particularly in highly regulated industries—were not always fully met, pointing to an opportunity for more tailored, industry-specific export support.

8.2. Programme impact and areas for improvement

The core export support programmes have proven instrumental in helping businesses overcome export challenges, such as market entry barriers, logistical constraints, and financial risks associated with international expansion. Businesses valued the direct connections facilitated by WG export support, with many crediting networking opportunities, financial subsidies, and in-market assistance with accelerating their export journeys.

Stakeholders highlighted that stronger coordination between WG and other export support bodies to improve signposting, referral processes, and awareness of available support would be beneficial. Beneficiary businesses also expressed a desire for greater flexibility in funding cycles and improvements in grant approval timelines to better align with trade event planning.

8.3. Looking ahead

The evaluation highlights the continued relevance of the core export support programmes in supporting Welsh businesses to compete in global markets. To maintain their effectiveness and strategic value, it is important that programmes continue to adapt to evolving trade dynamics, address gaps in sector-specific expertise, and enhance engagement with businesses at different stages of their export journeys. The findings provide a strong evidence base to inform future refinements, ensuring that WG export support remains responsive, impactful, and aligned with the needs of businesses in an increasingly competitive and uncertain global landscape.

9. Recommendations

9.1. Introduction

The recommendations outlined in this chapter reflect areas where the evidence suggests enhancements to export support could deliver improved outcomes for Welsh businesses. Many are deliberately ambitious, aiming to improve the responsiveness, sector relevance, and long-term effectiveness of support in an increasingly competitive global environment. However, it is recognised that implementing these changes—particularly those involving increased personalisation, sector-specific expertise, or expanded outreach—may carry significant financial and human resource implications. As such, the recommendations are intended to inform future planning and prioritisation, rather than prescribe a fixed programme of action. In weighing ambition against operational constraints, decision-makers may wish to prioritise actions with the strongest alignment to strategic goals, emerging sector needs, or areas where existing delivery infrastructure can be adapted with minimal additional burden.

9.2. Recommendation 1: Enhancing the effectiveness of the export support programmes

Recommendation 1.1: Refining the ITD Programme

While overall satisfaction with the ITD programme was high, 15 survey respondents and 6 interviewees reported that the consultants they were matched with lacked sufficient alignment with their sector, target market, or export goals. Several of these businesses highlighted that the current rotational model of consultant allocation reduced the ability to secure relevant and impactful advice. This concern was especially evident among businesses in complex or emerging sectors such as offshore renewables, aerospace, and healthcare technologies.

To improve business–consultant alignment, WG should:

- review the consultant matching process, with the aim of enabling greater flexibility to pair businesses with consultants whose expertise and networks are better aligned with sector and market needs. If possible, introducing a more competitive consultant appointment process could help improve the quality of connections and market opportunities
- refine follow-up support to go beyond evaluation feedback forms that primarily focus on logistics, instead ensuring that businesses can maintain and develop overseas relationships beyond the initial introduction, helping them translate early-stage discussions into tangible trade outcomes

Recommendation 1.2: Strengthening business preparedness for OVEs and OBDVs

While OBDVs and OVEs were well received overall, several businesses reported feeling underprepared for in-market engagement. 12 survey respondents and 4 interviewees indicated that they would have benefitted from clearer expectations, structured goal-setting, or practical preparation on cultural and commercial norms. It was stated that this lack of readiness limited their ability to convert initial contacts into meaningful export outcomes. To maximise the value of these visits — while recognising that responsibility is shared between government and business — it is recommended that WG:

- continue to offer pre-mission preparation sessions, covering market intelligence, cultural insights, and networking strategies.
- provide optional goal-setting tools to help articulate clear, realistic objectives that align with their export strategies
- enhance post-mission follow-up support, signposting follow-up support that enables businesses to build on contacts made during visits and embed learnings into future planning.

Recommendation 1.3: Expand sector-specific and regulatory export guidance

Evaluation findings highlighted a need for more targeted export guidance tailored to the specific challenges faced by businesses in regulated or technically complex industries. 13 survey respondents and 5 interviewees in sectors such as life sciences, renewables, and aerospace reported that available support was often too general and lacked sufficient depth on compliance, certification, and market access requirements. These businesses emphasised the importance of specialised guidance aligned with industry standards and regulatory frameworks.

In addition, post-EU exit changes to trade conditions have added a further layer of complexity. Across the evidence base, businesses expressed difficulty navigating customs procedures, VAT registration, and new certification requirements, especially for trade with the EU and USA. While the WG already provides access to online guidance via the Export Hub and Business Online Support Service (BOSS), the evaluation found that awareness and usage of these resources remains limited. Additionally, many businesses are unsure where to seek detailed answers on sector-specific compliance challenges.

While providing highly technical sector expertise may sit beyond the WG Export Team’s direct remit, its role in signposting and facilitating access to trusted external sources of guidance remains central. To ensure businesses in high-growth and high-compliance sectors are effectively supported, WG should:

- strengthen collaboration with sector bodies, trade associations, and academic institutions (e.g., Life Science Hub Wales, Industry Wales, AMRC Cymru, and Chambers of Commerce organisations) to embed deeper industry expertise into the wider export support ecosystem

- increase promotion and accessibility of the BOSS training platform and Export Hub, ensuring that businesses are aware of these resources through targeted outreach, integration into export advisory sessions, and clearer signposting on Business Wales platforms

- consider expanding sector-specific regulatory guidance within the Export Hub, particularly for industries with high compliance requirements (e.g., life sciences, food & drink, aerospace and renewables)

- strengthen the visibility and effectiveness of signposting to specialist export support organisations, such as the Institute of Export and International Trade, and Chambers of Commerce organisations [footnote35]

Recommendation 1.4: Support overseas buyers and partners to visit Wales

While trade missions and overseas visits have proven effective in connecting Welsh businesses with international markets, the evaluation also identified strong support among businesses for facilitating inward visits by international buyers and partners.

The Food and Drink Export Team within WG is currently exploring opportunities in this area, particularly regarding strategic inward visits for that sector. While this activity may not yet be part of the wider ExAP, feedback from businesses across multiple sectors suggests there is cross-cutting potential to expand and formalise such support.

Welsh Government already hosts inward-facing events with global actors such as CERN and UN procurement teams. Building on this established good practice, there may be opportunities to:

- develop sector-specific inward visit models where there is a strong commercial case, working in partnership with trade associations or clusters to co-design compelling offers

- incorporate selective inward visit opportunities into broader trade promotion strategies, especially in industries where site visits or product demonstrations are integral to export success

- explore light-touch support, such as co-hosting, convening, or logistical coordination, rather than full-scale buyer recruitment

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[35] While these relationships already exist, evaluation findings suggest that many businesses—particularly those with complex regulatory needs—are either unaware of these routes or unclear on how to access them. Improved integration into advisory sessions and clearer guidance on where to seek sector-specific compliance support would help address this gap.

Any expansion should be clearly demand-led and designed to complement the efforts of businesses, reinforcing WG's enabling role rather than creating expectations of direct delivery.

9.3. Recommendation 2: Increasing awareness and accessibility of export support

Recommendation 2.1: Sector-specific export forums and events

While recommendation 1.3 addressed the need to improve the quality and sector-relevance of export guidance through stronger collaboration with trade and industry bodies, this recommendation focuses on how such partnerships can also be leveraged to raise awareness and increase participation in WG export support programmes—particularly among businesses that have yet to engage.

The evaluation found that 42 non-beneficiaries (50.6%) who responded to a question on awareness of WG export support programmes reported being unaware of the support. This indicates that many exporting businesses and those with export potential are not accessing available resources. While the Explore Export Wales events serve as a Wales-wide engagement opportunity, there is scope for more targeted, industry-specific support that aligns with the specific challenges and opportunities faced by businesses in different sectors. To address this, WG should:

- host forums held in collaboration with sector bodies and trade associations (e.g., High Value Manufacturing Catapult, Life Sciences Hub Wales), integrated into existing sector conferences and business networking events. These forums can serve to deliver tailored export advice, discuss market trends, and promote available support services through relatable sector case studies and peer engagement.

Position forums as a bridge between awareness and action, helping businesses move from initial interest to active participation in WG export programmes.

Recommendation 2.2: Enhance digital outreach and targeted social media marketing campaigns

In addition to highlighting case studies on the BW website, targeted industry-specific forums/ LinkedIn/Twitter (X) campaigns promoting case studies and success stories to sector-specific audiences should be implemented.

Enhancing the strategic focus of digital outreach would ensure that businesses in particular sectors are regularly exposed to export opportunities, funding support, and case studies that highlight examples of Welsh exporters succeeding internationally. This includes:

- ad placements and sponsored content in strategic business forums and networks, such as Federation of Small Businesses (FSB), Wales Business Insider, Confederation of British Industry, and trade-specific LinkedIn groups, ensuring WG export support is visible to businesses already engaged in industry discussions

- short-form video content (e.g. LinkedIn Reels or YouTube Shorts) featuring Welsh exporters discussing their international journey. These should be platform-appropriate and focused on practical lessons, personal insights, or market tips — tailored more to peer-to-peer business audiences than general consumer branding
- targeted video ads and boosted posts on Facebook, to reach SMEs and sole traders who may not engage with professional platforms. These could showcase relevant schemes, signpost users to support channels, or profile relatable success stories

A dedicated social media campaign (e.g., #ExportWalesSuccess 'Made in Wales' branding-highlighting the uniqueness, quality, and innovation of Welsh products), featuring weekly content on export opportunities, testimonials, and expert-led discussions on market trends, raising awareness of support.

Recommendation 2.3: Strengthen peer signposting and intermediary collaboration

WG actively engages in a range of outreach activities to raise awareness of its export support among Welsh exporting businesses. However, evaluation feedback indicated that some businesses first became aware of the offer through informal channels—including industry peers, sector groups, and regional intermediaries—rather than through direct engagement with Business Wales or the WG Export Team. This highlights an opportunity to complement formal outreach efforts by strengthening alignment with external networks that businesses frequently engage with.

Improving coordination and consistency across these intermediary channels would help ensure that export-ready businesses—particularly micro-enterprises and first-time exporters—are signposted to the most relevant support at the right time. To support this, WG should:

- continue to enhance collaboration with local business networks (such as, M-Sparc), local authorities, and sector intermediaries (such as Chambers of Commerce organisations, AMRC Cymru, Life Sciences Hub Wales), equipping them with up-to-date information and tools to promote export support consistently
- consider developing a standardised referral and awareness toolkit, outlining the main support pathways for businesses at various stages of export readiness and providing materials that partners can use in their own communications
- explore the development of periodic briefings and knowledge-sharing sessions for important intermediaries, including Chambers of Commerce organisations, DBT, local authorities, and cluster leads, to ensure consistent messaging and timely referrals.

9.4. Recommendation 3: Strengthening monitoring, outcome tracking, and evaluation

Recommendation 3.1: Introducing structured long-term export tracking

Welsh Government has made significant progress in modernising its business support systems and data collection processes. Building on these developments, there is an opportunity to enhance the structured tracking of long-term business outcomes, particularly in relation to exports.

The evaluation found that while valuable performance data is collected, gaps remain in capturing consistent baseline indicators (e.g. employment, turnover, and export sales). This limits the ability to measure longitudinal impact.

To build on recent improvements and strengthen the evidence base, WG could consider:

- integrating outcome tracking into existing CRM or business support management systems, enabling programme teams to view longitudinal progress data in one place
- using short, consistent survey formats or light-touch check-ins, designed to capture meaningful outcome data without placing additional strain on businesses or ITAs
- using this data to inform learning cycles, feeding insights back into programme design, resource allocation, and sector strategy development

10. Annex A: Case studies

10.1. Overview

As part of the impact evaluation, 5 case studies were conducted to provide in-depth insights into the experiences of businesses that received WG export support. The objective was to select businesses that reflect the diversity of the core export support programme beneficiaries, including variations in size, sector, geography, and level of engagement with support programmes.

10.2. Selection process

To facilitate the case study selection, Miller research provided the WG Trade Analysis Team with a preliminary 'sampling guide', outlining the factors to be used in the selection. These included the following:

Business size

Representation of micro, small, medium, and large businesses to capture differences in how businesses of varying scales engage with and benefit from export support.

Geographic location

Ensuring coverage from different regions of Wales (North, Mid, South East, and South West) to understand regional variations in support access and impact.

Business sector

Prioritising businesses from manufacturing, technology, Life Sciences, food and drink, and other important export sectors to capture diverse industry perspectives.

Frequency and period of support accessed

Including businesses that had accessed support both frequently and infrequently, to examine the impact of both one-off and long-term engagement with WG export initiatives.

Based on these criteria, the WG used data on supported businesses kept on file, combined with secondary data from FAME, a business database, to conduct a cluster analysis of Wales-based businesses who had received WG export support during the evaluation period, 2017-2024. To ensure impartiality, the results of the cluster analysis were then passed to Miller Research to make the final selection of cases for further investigation. From the initial list of 12 businesses, 5 were selected as case studies. The final selection was influenced by businesses' availability and willingness to participate in interviews. While the selection aimed for an ideal balance of cases, real-world constraints such as the availability and time commitments of businesses resulted in some deviations from the initial selection criteria. However, the final sample still reflected a wide range of experiences and provided valuable insights into the working and impact of core export support programmes.

10.3. Final case study businesses

The following 5 businesses were selected for case studies:

1. **Haia Communications** (North Wales) – A micro sized business in the technology/communications sector.
2. **Dulas Ltd** (Mid Wales) – A medium-sized business in the renewable energy sector.
3. **Frontier Medical Group** (South East Wales) – A medium sized business in the healthcare/medical devices business.
4. **Triumph** (North Wales) – A medium sized company representing the advanced manufacturing sector.
5. **BrainBox** (South Wales Central) – A small sized business engaged in the healthcare and social services sector, as well as the professional services sector.

10.4. Haia Communications: Navigating Market Shifts with Welsh Government Export Support

10.4.1. Business Overview and Export Journey

Established in August 2020 and headquartered at M-Sparc Menai Science Park in Gaerwen, North Wales, Haia Communications Ltd is a private limited company specialising in software publishing and development. The company offers a web-based platform designed to facilitate virtual and hybrid events, emphasising accessibility and user engagement. Haia's services cater to a diverse range of events, including corporate meetings, public engagements, community events, and art performances.

Initially, Haia focused on providing a hybrid events platform to meet the surge in demand for virtual solutions during the COVID-19 pandemic. The platform featured integrated translation services, allowing users speaking different languages to interact seamlessly, and an intuitive agenda-building system to enhance user experience. However, as pandemic restrictions eased, the demand for hybrid events declined, prompting Haia to pivot towards the rapidly expanding e-sports sector. This shift led to the development of Streams+, a global e-sports streaming network aimed at connecting fans, event organisers, and influencers.

10.4.2. Engagement with Welsh Government Export Support

Haia Communications began engaging with Welsh Government export support in 2021 by attending the Explore Export Wales event, which introduced the company to the range of resources and programmes available to Welsh businesses looking to expand internationally. This initial exposure marked the start of Haia's export journey, as the company began exploring opportunities to scale its hybrid events platform in global markets. Following this, Haia leveraged various Welsh Government programmes to support its evolving business strategy over the years. The company utilised the ITD (International Trade Development) support to conduct market research for the U.S., gaining a deeper understanding of potential opportunities and challenges in the hybrid events sector. Their first OBDV (Overseas Business Development Visit) in 2023 took them to Event Technology Live in Las Vegas, where they exhibited alongside global players and engaged with high-profile stakeholders, including Bloomberg. While the shrinking demand for hybrid events limited the immediate outcomes, this event provided valuable insights and highlighted the importance of maintaining a presence in key markets.

Haia also accessed the ITO (International Trade Opportunities) support, which facilitated meetings with potential clients and stakeholders in markets such as the Netherlands and Germany. These connections provided meaningful feedback and helped Haia refine its export strategy. Their participation in the Berlin Innovation Festival during their pivot to e-sports was a significant milestone, allowing Haia to showcase their new platform, Streams+, and establish networks within the e-sports sector.

Since 2021, the organisation has accessed support on eight occasions, participating in trade visits, exhibitions, and networking events. This support has provided foundational insights and connections that informed Haia’s transition from hybrid events to a longer-term focus on e-sports, while equipping the company with tools to pursue future growth in emerging markets.

10.4.3. Impact of Welsh Government Support: Financial Outcomes

While Haia Communications has benefited from Welsh Government support to explore international markets and establish connections, this has not yet translated into significant revenue growth. The timing of their initial export efforts coincided with the rapid decline in demand for hybrid events, limiting the financial impact of programmes such as their OBDV-funded visit to Event Technology Live in Las Vegas. Similarly, while the Netherlands trade visit enabled valuable market research and facilitated meetings with potential clients, the shrinking hybrid events market prevented these efforts from resulting in revenue.

Haia’s pivot to the e-sports sector in 2024 introduces a longer-term financial strategy. The company’s new business model focuses on building a user base for their platform, Streams+, with plans to generate revenue through transactions such as subscriptions. While these efforts have yet to yield measurable financial returns, the groundwork laid through Welsh Government-supported events and market exploration is expected to inform future growth in global e-sports markets.

10.4.4. Non-Financial impact

Despite limited financial returns, the export support has provided Haia with important non-financial benefits that have shaped their strategic direction and informed their pivot to e-sports. The trade visits and events allowed Haia to establish valuable connections with stakeholders in markets such as the United States, the Netherlands, and Germany. For example, the company’s participation in the Berlin Innovation Festival gave them the opportunity to present their pivot into e-sports to an international audience, gaining feedback that continues to guide their approach to this emerging sector. The support also enhanced Haia’s understanding of market dynamics, particularly through ITD-led market research. These insights were instrumental in shaping their plans to expand into regions such as Southeast Asia, the United States, and Europe, where the e-sports market is thriving. Additionally, networking opportunities provided by the export support programmes introduced Haia to other start-ups and businesses, fostering cross-sector connections that remain valuable as they refine their business model.

The company also highlighted the credibility gained from its association with the Welsh Government. This credibility has opened doors for Haia to engage with prominent stakeholders, such as Bloomberg, during the Las Vegas conference and other events. While these connections have not yet materialised into direct outcomes, they have positioned Haia to pursue future opportunities in their target markets.

10.4.5. Challenges

Haia Communications encountered two challenges during its engagement with Welsh Government export support. The first was the administrative burden associated with grant applications. The process was described as time-intensive, with lengthy forms and repetitive questions creating inefficiencies. Securing OBDV funding for the Las Vegas event, for example, required substantial effort to ensure the application was processed in time. This placed additional pressure on Haia's small team, which was already managing the demands of transitioning its business model. The second challenge was the missed opportunity to focus on the domestic market. Haia noted that greater support for developing business connections within major UK cities, such as London and Manchester, could have helped establish a stronger domestic foundation before pursuing international markets. The company suggested that Welsh Government could expand its focus to include intra-UK trade opportunities, providing businesses like Haia with a stepping stone to build networks and refine their strategies before expanding globally. Despite these challenges, Haia greatly values the Welsh Government export support and the foundational benefits of the assistance they received.

10.4.6. Future Plans & Continued Collaboration

Looking ahead, Haia aims to establish a strong foothold in the global e-sports market through their Streams+ platform. The company plans to target regions with thriving e-sports communities, such as Southeast Asia, the United States, and Europe, while using the UK as a base to refine their approach. In the short term, Haia is focusing on building brand awareness through content creation and social media outreach. This includes producing video content for platforms like YouTube and TikTok to attract users and drive engagement. The company has set a timeline for launching this strategy by mid-2025, aiming to build a consistent pipeline of content to grow their user base.

Haia sees potential for further collaboration with Welsh Government, particularly in facilitating trade visits and networking events to connect them with stakeholders in key regions. The company noted that support programmes such as the ITD and ITO could be highly valuable in addressing the unique needs of emerging sectors like e-sports. Additionally, Haia expressed interest in Welsh Government-led support programmes that would foster connections within the UK market. This includes greater support for attending events and building networks in major UK cities, which could provide a stronger foundation for their global ambitions. With continued collaboration and more tailored assistance, Haia hopes to strengthen its position in the e-sports sector and achieve sustainable growth in international markets.

10.4.7. Final Reflections from Tom Burke:

> "The Welsh Government export support is a fantastic initiative. While some elements didn't align perfectly with our journey, the groundwork and opportunities provided have been invaluable. I hope to see these programmes continue to evolve to meet the needs of businesses like ours" - Tom Burke, CEO and Co-Founder

10.5. Dulas Renewables: A Case Study of Export Growth and Product Innovation in Renewable Energy

10.5.1. Business Overview and Export Journey

Dulas, founded in 1982 and headquartered in Mid Wales, is a renewable energy company specialising in solar-powered technologies. The company is globally recognised as the only UK manufacturer of WHO PQS-accredited solar-powered refrigerators, which are vital for storing vaccines in remote areas with limited electricity access. Each solar fridge has the capacity to vaccinate up to 10,000 children, playing a crucial role in public health initiatives across sub Saharan Africa and other underserved regions. Over its 40-year history, Dulas has continually innovated in the renewable energy sector, expanding its offerings to include products and services for hydro, wind and solar. Exporting has long been a cornerstone of its operations, with a focus on providing life-saving technologies to humanitarian markets worldwide. In recent years, the company has strategically targeted regions like Latin America and West Africa, leveraging Welsh Government support to forge new partnerships and expand its global reach.

10.5.2. Engagement with Welsh Government Export Support

Dulas has been accessing Welsh Government export support since 2012, with increased reliance on these programmes over the past five years. The company engaged with Welsh Government support to address specific challenges, including limited visibility in key markets, the need to secure contracts in new regions, and the desire to innovate and improve its product offerings. Welsh Government export support has provided Dulas with the tools and resources to enter unfamiliar markets and differentiate itself in competitive spaces. The decision to engage with Welsh Government support was driven by three primary goals:

1. Expand Market Reach: Dulas sought to establish relationships in new markets, particularly in regions such as West Africa and Latin America, where its renewable energy solutions could have the greatest impact. The ITO (International Trade Opportunities) support helped identify distributors and stakeholders, enabling the company to build connections in critical markets.
2. Increase Brand Awareness: Dulas aimed to enhance its visibility by attending major exhibitions and events. The OBDV (Overseas Business Development Visit) funded participation in events like Aidex in Geneva, humanitarian exhibitions in Panama, and Welsh Government pavilions at international trade shows, including MEDICA in Germany and Arab Health in the Middle East.
3. Drive Product Innovation: Research support also assisted Dulas' transition from battery-powered refrigerators to more sustainable solar-powered models. This shift not only improved product longevity but also aligned with the company's renewable energy mission. The company participated in Welsh Government training events, including a session on internationalising their website, which has helped enhance their digital and global presence. Dulas noted that they have also been highlighted by the Welsh Government as an example of success, featuring in promotional activities to showcase the benefits of the Welsh Government support to other small businesses.

10.5.3. Impact of Welsh Government Support: financial outcomes

Welsh Government support has significantly bolstered Dulas' performance, enabling the company to secure contracts worth over £2.5 million in the past decade. The ability to attend exhibitions in regions including West Africa and Latin America has opened doors to new opportunities. For example, Dulas' participation in events in Panama, supported by OBDV grants, led to contracts in Venezuela and has expanded the company's footprint in Latin America. Similarly, support for in-person engagement in West Africa allowed Dulas to meet with Ministries of Health, securing contracts that would not have been possible without the Welsh Government export support.

10.5.4. Non-Financial impact

Beyond financial gains, Welsh Government support has led to significant operational improvements and increased visibility for Dulas. The company expanded its international solar team and recruited two new account managers, directly addressing the rising demand for its products in export markets. At the same time, it has doubled its production capacity to meet growing global needs. Research support provided by the Welsh Government has been critical in transitioning the company from battery-powered to solar-powered refrigerators, a move that is improving product sustainability and strengthening its position in the renewable energy sector.

The support also enhanced Dulas' ability to engage with global markets. Participation in international exhibitions and events, often through Welsh Government pavilions, enabled the company to interact directly with decision-makers and build trust with potential clients. During the COVID-19 pandemic, Welsh Government grants allowed Dulas to create an online training platform, ensuring it could maintain engagement with customers and partners despite restrictions on travel. These efforts have reinforced Dulas' credibility and competitiveness in international markets.

10.5.5. Challenges

While Welsh Government support has been overwhelmingly positive for Dulas, a few challenges were noted. The timing of grant approvals for programmes like OBDV occasionally created logistical difficulties, as the company could not confirm travel arrangements until funding decisions were finalised. On a few occasions this led to higher costs for last-minute bookings. Additionally, short lead times for grant applications limited Dulas' ability to plan participation in events far in advance. Despite these challenges, the company praised the simplicity of the grant application process and the proactive support provided by Welsh Government advisors.

10.5.6. Future Plans & Continued Collaboration

Looking ahead, Dulas plans to deepen its presence in Latin America and West Africa, building on the relationships and opportunities facilitated by the Welsh Government export support. The company aims to expand its distributor network and establish localised training programmes to better serve its markets. Developing new renewable energy products also remains a priority, with plans to leverage additional Welsh Government research support to drive innovation. Participation in international events, such as Arab Health 2025, is another key component of Dulas' future strategy, with support from OBDV grants anticipated. By continuing its collaboration with Welsh Government, Dulas hopes to sustain its growth trajectory while addressing critical global needs in renewable energy and vaccine storage.

10.5.7. Final Reflections

Welsh Government support has been essential to Dulas' success, offering both financial and strategic value. The combined impact of the ITO, ITD, and OBDV support has enabled the company to achieve sustained growth, enter new markets, and innovate its product offerings. Dulas emphasised that the support from the Welsh Government has exceeded expectations, providing the resources and expertise to compete on a global stage.

> "The support from Welsh Government has been invaluable in helping us grow and innovate. From securing contracts to developing new products, the impact of their assistance has been profound. We're excited to continue working with the export team as we explore new opportunities and expand our global footprint."
>
> -Catherine McLennan, Commercial Lead. Dulas Life Sciences

10.6. Frontier Medical group: A Case Study of Export Growth and Distributor Network Expansion

10.6.1. Business Overview and Export Journey

Frontier Medical Group, headquartered in Tredegar, South East Wales, is a manufacturer of innovative pressure area care solutions. Backed by private equity investment, the company has focused on expanding its international footprint, driven by its flagship products, Repose and Toto. Repose, a well-established product in the portfolio, is designed to prevent and manage pressure ulcers, while Toto, a newer device, automates the process of patient turning to relieve pressure, reducing nurse workload and healthcare costs.

Despite the strength of its product offerings and extensive clinical evidence supporting their efficacy, Frontier faced challenges early in its export journey. Until recent years, exporting was treated opportunistically rather than strategically. When private equity investors emphasised the importance of international growth, the company began to lay the foundation for a more sustainable export strategy. Over the past two years, Frontier has transformed its approach, focusing on building reliable distributor networks, entering new markets, and aligning internal processes with the demands of international trade.

10.6.2. Engagement with Welsh Government Export Support

Frontier began engaging with Welsh Government export support in 2022 when a WG International Trade Adviser (ITA), reached out to offer assistance. Recognising the scale of support available through programmes including ITD (International Trade Development) and ITO (International Trade Opportunities), Frontier's leadership quickly embraced the opportunity.

The company initially tested the waters with a single ITD and ITO to gauge their effectiveness. Impressed by the results, they expanded their use of these programmes, eventually accessing five ITOs, three ITDs, and an OBDV (Overseas Business Development Visit) grant to attend a major industry exhibition in Switzerland.

Frontier utilised ITDs to gather critical market intelligence, particularly for challenging regions like Japan. This helped the company understand regulatory requirements and market dynamics before committing significant resources. ITOs, on the other hand, were used to identify and connect with suitable distributors, particularly in markets where Frontier had no prior presence, such as Canada. This enabled Frontier to develop tailored approaches for its products, ensuring better alignment with local market needs.

The ITA remained a constant support throughout this period, providing strategic advice and meeting quarterly to review projects and plan future initiatives. Another member of the Welsh Government export team, also offered valuable feedback, helping Frontier refine its approach to market expansion.

10.6.3. Impact of Welsh Government Support: Financial Outcomes

Welsh Government support has played a pivotal role in Frontier's recent international growth. Over the past two years, the company has achieved 20% growth in its international business, entering new markets, and strengthening its presence in existing ones.

The support that Frontier has accessed has enabled the company to explore nine new markets—three times the pace it could have achieved independently without this assistance.

The support provided by ITDs and ITOs has helped de-risk market entry, accelerate decision-making processes, and ensure that Frontier allocates its resources more effectively. Additionally, The OBDV grant was also instrumental in enabling Frontier to participate in a major industry exhibition in Switzerland, where the company secured valuable leads and end-user insights that shaped its distributor strategy and future market approach.

10.6.4. Non-Financial impact

Welsh Government support has significantly influenced Frontier's internal operations. Processes from ITDs, such as leveraging detailed market research and regulatory insights, have now been integrated into Frontier's decision-making framework, enabling the company to evaluate potential markets with greater confidence. Similarly, ITOs introduced a structured approach to identifying and vetting distributors, ensuring a consistent method for partner selection and engagement. This integration has formalised the company's export strategy, providing a clear roadmap for market entry and distributor network expansion.

10.6.5. Transformative Moments

Frontier highlighted the personalised support provided by the Welsh Government export support team. The ITA was praised for their consistent engagement and the ability to offer strategic insights beyond routine advice. Quarterly meetings with the ITA were described as pivotal for resetting the company's thinking and ensuring a forward-looking approach to export strategy.

The company also highlighted the transformative impact of its participation in the Swiss industry exhibition, made possible by OBDV support. This event allowed Frontier to engage directly with end users and distributors, gaining invaluable market insights that would have been difficult to obtain otherwise.

10.6.6. Challenges

While Frontier's experience with Welsh Government support has been overwhelmingly positive, a few challenges were noted. The most significant was the administrative burden of accessing OBDV funding. The application process was described as time-consuming and sometimes misaligned with the company's internal processes and timelines. For example, funding cycle restrictions occasionally led to delays, forcing Frontier to make last-minute travel arrangements at a higher cost.

Additionally, Frontier highlighted that Welsh Government could be more mindful of the complexities within larger organisations. Requests for information or quick responses were not always feasible due to Frontier's internal protocols, creating occasional friction. Despite these challenges, the overall impact of Welsh Government support far outweighed the difficulties encountered, with Frontier emphasising the value of their partnership.

10.6.7. Future Plans & Continued Collaboration

Frontier's ambitions include expanding its presence in the Americas, the Middle East, and Asia, alongside introducing new products to market. To achieve these goals, the company plans to undertake ITOs and ITDs. Recruiting regional specialists to oversee these markets is also a priority, ensuring sustained growth and effective distributor management.

Frontier also aims to leverage Welsh Government support for research and innovation grants, which will be crucial for developing new technologies and entering new sectors. Frontier expressed appreciation for Welsh Government's strong presence at international events like Medica and Arab Health, describing the Welsh stands as more appealing and better organised than other export support organisations.

Frontier views the Welsh Government export support as integral to its success. The company attributes its accelerated international expansion and improved internal processes directly to the support received. Ian Poulter, the International Distribution Manager at Frontier, emphasised that without this assistance, the company would have progressed at a much slower pace and potentially made costly mistakes in new markets.

10.6.8. Final Reflections from Ian Poulter:

> "Welsh Government support has been a game-changer for us. From enabling us to explore new markets to supporting our attendance at key industry events, the impact has been profound. We've redefined our ambitions as a company because of the resources and guidance provided. Their support is a credit to what they do, and we look forward to continuing this valuable partnership."

- Ian Poulter, International Distribution Manager

10.7. Triumph Aerospace Operations UK: A Case Study of Export Growth and Strategic Partnerships

10.7.1. Business Overview and Export Journey

Triumph Aerospace Operations UK, a division of the global Triumph Group Inc., is a specialised SME headquartered in Deeside, Flintshire, with additional facilities in Cheltenham and the Isle of Man. Employing over 200 staff across Wales, the Isle of Man, and other UK locations, the company is a global leader in hydraulic and electrical actuation products. Triumph's products are integral to platforms such as the Airbus A320 and Boeing 787, with over 90% of its output exported globally.

The company's rich heritage, tracing back to the Dowty brothers and iconic platforms like the Spitfire and Typhoon, underscores its long-standing contribution to the aerospace sector. Triumph has expanded its export operations over time, focusing primarily on the civil aviation market. However, recent years have seen a strategic shift toward the defence sector to diversify its portfolio and secure new revenue streams.

10.7.2. Engagement with Welsh Government Export Support

Triumph first engaged with Welsh Government export support in 2021 after relocating its UK headquarters to Deeside, Flintshire. This connection was facilitated through Aerospace Wales, a key industry body that serves as an interface between Welsh Government and the aerospace industry.

Triumph received financial support through the Overseas Business Development Visits (OBDV) and Events & Exhibitions programmes including subsidies for attending major international trade shows and events such as DSEI London, the Farnborough International Air Show, and the Paris Air Show, covering travel, exhibition costs, and event coordination. Triumph highlighted the role of the Event Manager in directly assisting with preparing Triumph's exhibition stands, ensuring professional representation at global events.

A WG representative within high-value manufacturing, played a pivotal role in guiding Triumph's strategic export journey by signposting opportunities and facilitating introductions to key contacts.

The export support team also facilitated strategic introductions with key decision-makers, including the Vice President of Procurement at BAE Systems, while also providing market insights to help Triumph refine its approach to entering military markets. Furthermore, the export support team helped the company gain visibility at diplomatic receptions, such as a British Embassy event in Paris, enhancing credibility and providing access to critical networking spaces.

The support, while event-specific and intermittent since 2021, was described as exceptionally effective by Triumph. The company emphasised the personalised nature of the engagement, particularly the continued support and direct relationships maintained with Welsh Government personnel. The ongoing collaboration, even when not tied to specific events, provided consistent access to strategic insights and event opportunities that contributed to Triumph’s ability to secure new export opportunities.

10.7.3. Financial impact

Welsh Government export support has played a direct role in Triumph securing between six and seven significant defence contract opportunities. One defence opportunity initiated in 2021 is approaching a key decision point in early 2025, with the potential to increase Triumph’s revenue by 10-20%. This success was driven largely by the visibility and credibility gained through attending Welsh Government-backed trade events and strategic introductions to major defence contractors. If successful, Triumph anticipates revenue growth from its current £50 million to over £100 million by 2030.

10.7.4. Non-Financial impact

Beyond the financial gains, the Welsh Government support has transformed Triumph’s strategic positioning in defence markets. The company reported significant improvements in credibility when operating in new markets, with direct introductions at key events enhancing trust with potential clients. The financial support in the form of subsidies also allowed Triumph to redirect internal resources toward strategic expansion, minimising the time spent on administrative tasks related to trade events. This support has positioned Triumph to diversify its revenue streams by expanding into defence contracts, complementing its existing civil aviation business.

10.7.5. Transformative Moments

Triumph’s UK Programmes Director, David Chapman, highlighted how Welsh Government support not only met but exceeded expectations. He described the personalised nature of the assistance as pivotal, particularly when compared to the broader and less specialised support from other export support organisations. Chapman recounted how direct introductions to decision-makers at events such as DSEI London and the Paris Air Show were instrumental in securing defence opportunities.

A particularly transformative moment involved a strategic introduction to the Vice President of Procurement at BAE Systems during a Welsh Government-sponsored trade event. This introduction, paired with the visibility provided through participation in British Embassy receptions, significantly enhanced Triumph's credibility in the defence market. Chapman emphasised that these introductions created immediate opportunities that would have been difficult to secure independently, highlighting the importance of Welsh Government’s relationship-driven approach.

10.7.6. Key Milestones

- Gained International Traffic in Arms Regulations (ITAR) approval, allowing involvement in U.S. military projects.
- Secured JOSCAR accreditation, a UK defence and aerospace supplier accreditation necessary for bidding on UK defence contracts.

- Expanded into the European defence sector and is participating in key defence projects, targeting programmes such as the Global Combat Air Programme (GCAP).

Despite these successes, Triumph faced challenges entering new defence markets due to complex approval processes and intense competition from established contractors.

10.7.7. Challenges and lessons learned

Triumph encountered challenges related to the complexity of defence sector approvals and balancing core operations with growth ambitions. Gaining JOSCAR accreditation was essential for defence market entry, but the process was resource-intensive. Similarly, while Welsh Government support effectively reduced administrative burdens, Triumph noted the challenge of balancing export expansion with day-to-day business operations in the highly regulated aerospace sector.

The company praised the Welsh Government's efforts in providing networking opportunities and strategic introductions, which addressed many of these challenges.

10.7.8. Future Plans & Continued Collaboration

Triumph aims to double its revenue to £100 million by 2030, with a strategic focus on military aviation projects, including continued engagement with the GCAP and missile system contracts. The company also plans to expand into new markets, such as Japan and India, where strategic defence collaborations are emerging.

Triumph's future collaboration with the Welsh Government will focus on continued support for international trade missions, including DSEI Japan, and assistance with networking strategies in new defence markets. Additionally, Triumph is exploring opportunities for Welsh Government involvement in advocating for Welsh content requirements in UK defence contracts to ensure regional economic benefits.

Triumph views the Welsh Government's export support as critical for its export success. The financial assistance, strategic introductions, and long-term relationship management have directly contributed to significant revenue opportunities and market positioning.

10.7.9. Final Reflections from David Chapman:

> "Welsh Government support has been a game-changer for us. The tailored, proactive assistance, from strategic introductions to financial backing for trade shows, has had a direct impact on our ability to expand into defence markets. The relationship has far exceeded our expectations, and we continue to view this partnership as central to our future growth."
>
> - David Chapman, Triumph Programme Director

10.8. Brainbox Ltd: A Case Study of Export Growth and Product Innovation in Renewable Energy

10.8.1. Business Overview and Export Journey

Brainbox Ltd, established in 2010 and headquartered in Cardiff, Wales, specialises in providing integrated non-invasive brain stimulation and brain imaging technology. Leveraging decades of technical and academic expertise, the company offers tailored solutions to support advanced neuroscience research.

Operating in the life sciences sector, Brainbox collaborates with universities and hospitals globally, targeting advanced economies with substantial funding for scientific research, including the United States, Japan, China, and Europe. With 80% of its £5 million annual turnover generated through exports, the company has maintained a global presence in its niche market since inceptions

Brainbox's export journey began alongside its inception in 2010, as the company's highly specialised products required immediate engagement with international markets to access its target audience and sustain growth. Initially working with two manufacturers, the company has since expanded its portfolio to include equipment from multiple key suppliers. Over the years, Brainbox has achieved significant milestones, including penetration into Japan and China, launching new products globally, and securing contracts in Belgium and France. A £1 million system was sold to a French start-up following a Welsh Government-supported conference, further solidifying Brainbox's position as a leader in its field.

10.8.2. Engagement with Welsh Government Export Support

Brainbox first engaged with the Welsh Government export support team in 2013 to attend a company visit in the United States under the OBDV (Overseas Business Development Visit) programme. After a brief pause in their engagement, they resumed in 2020 and have since accessed extensive support, including OBDVs, ITD (International Trade Development), and participation in trade missions. Between 2022 and 2024, Brainbox accessed the OBDV programme, enabling it to attend conferences that were tailored to its highly specific target audience of researchers and end-users.

The ITD programme, though not fully completed, provided valuable market research insights into the U.S., which informed Brainbox's export strategy. Ultimately, the company chose an alternate approach to expand into this market, demonstrating flexibility in its decision-making. Brainbox also praised the support provided by their International Trade Advisor (ITA), who consistently flagged relevant opportunities. For example, Brainbox was invited to a roundtable discussion with the Australian government for life sciences companies, a direct result of proactive engagement by their ITA.

Brainbox also participated in trade missions to events such as Medica and Arab Health, which were facilitated by the export support team. While these were useful for gaining exposure, they were less impactful compared to OBDV-funded attendance at niche conferences specific to their sector. These events, including conferences in South Korea and Germany, provided opportunities to launch new products, connect with distributors, and secure significant contracts.

10.8.3. Impact of the Welsh Government Export Support: Financial Outcomes

The export support has made a measurable contribution to Brainbox's financial growth. Between 2021 and 2022, the company secured £800,000 in contracts directly tied to their presence at Welsh Government-supported conferences, with an additional £1.3 million generated through follow-up sales.

These events also facilitated the sale of a £1 million system to a French start-up, a significant milestone for the company. By providing financial assistance for high-cost events, OBDV support allowed Brainbox to reallocate internal resources, enabling them to attend additional events and expand their marketing efforts domestically and internationally.

10.8.4. Non-Financial impact

The Welsh Government export support has also played a key role in enabling Brainbox to scale its operations and refine its export strategy. By focusing their marketing efforts on high-priority regions and launching new products through conferences, the company has strengthened its relationships with distributors, researchers, and end-users. These relationships have been instrumental in sustaining long-term growth and increasing Brainbox's visibility in the neuroscience research community.

The company has also expanded its workforce, growing from five employees in 2018 to twelve in 2024, and secured exclusive distribution agreements for new products. For example, the launch of a transcranial ultrasound stimulation system—a product now central to Brainbox's portfolio—was supported by OBDV-funded events, enabling the company to reach new audiences and drive momentum for future sales.

10.8.5. Challenges

While the export support has been highly effective for Brainbox, the company identified a few areas for improvement. The administrative process for applying for and claiming support was described as time-consuming, requiring extensive documentation such as invoices and receipts. This created additional pressure for the small team, though they acknowledged that the process was manageable and worthwhile given the value of the support.

Another challenge was the limited flexibility in travel funding rules, which restricted support to travel originating in the UK. This was problematic for Brainbox, as team members based in other countries were ineligible for reimbursement, even for conferences that were integral to the company's export strategy. Brainbox suggested that expanding support to include in-country travel or internal flights for global teams could significantly enhance the impact of the export support programmes.

10.8.6. Future Plans & Continued Collaboration

Brainbox's future plans focus on strengthening their presence in key markets, particularly the EU and United States, which remain critical regions for the neuroscience research sector. The company aims to achieve this by continuing to attend conferences with the Welsh Government export support, leveraging these events to launch new products and connect with distributors and end-users. Expanding their product portfolio is also a priority, with plans to secure additional distribution agreements and grow their reach within the life sciences community.

Additionally, Brainbox is exploring the potential of establishing a subsidiary in the EU to navigate post EU-exit trade barriers more effectively and streamline operations. They also expressed interest in receiving support or guidance from Welsh Government in managing the logistical and administrative aspects of setting up a subsidiary, further demonstrating the value of tailored assistance for businesses undergoing structural expansion.

Brainbox reflected on the Welsh Government export support as an important part of their growth and success in international markets. The programmes, particularly OBDV, allowed the company to attend conferences that would have otherwise been beyond their financial reach, providing essential opportunities to connect with distributors, researchers, and end-users in their niche market. These events not only facilitated significant sales but also enabled the company to secure exclusive distribution agreements, contributing to the growth of their product portfolio and turnover.

10.8.7. Final Reflections from Dan Phillips

> "Welsh Government support has been critical to our growth and export success. From launching new products to maintaining long-term relationships, the impact has been invaluable. We hope the programme continues to support companies like ours as we expand into new markets and innovate in our field."
>
> -Dan Phillips, CEO and Co-founder

Annex B: Process evaluation summary

10.9. Background

Miller Research carried out a process evaluation of the 4 core export support programmes between December 2023 and March 2024. The focus of this evaluation was to provide an initial examination of these programmes' foundation, their operational mechanisms, and their preliminary impacts on Welsh businesses' export activities, laying the foundations for further exploration in the impact evaluation.

The research questions addressed as part of the process evaluation were as follows:

- how were the results of previous evaluations of export support programmes taken into consideration in development of the current Plan?
- to what extent are decisions about the implementation of the core export support programmes based on use of market intelligence with regards to priority and changing export markets, and Wales's sectoral strengths?
- are the available resources sufficient for the needs of the different core export programmes and are they allocated in a way that ensures maximum benefit to programme users?
- to what extent has the changing economic context (including the effects of EU-exit and new Free Trade Agreements) affected delivery and take up of export support? Have these effects differed across export sectors?
- are monitoring and data gathering practices sufficiently detailed and timely to capture the effects of programme participation upon beneficiaries, and to identify any enhancements to delivery that might be made
- are the available budget and team resources being allocated most effectively, both amongst the core export support programmes and between Welsh businesses?
- are the core export programmes being promoted effectively? Does the promotion ensure that knowledge and take-up of programmes are distributed effectively across priority and other sectors?

10.10. Method

A mixed-methods approach was adopted, entailing 5 qualitative stakeholder interviews with relevant WG officials and documentation analysis of secondary data. The main outputs of the evaluation included the development of a programme logic model and monitoring framework, as well as an internal report.

10.11. Findings

The evaluation findings delved into the policy and contextual background influencing the 4 core programmes' development and implementation. The review of existing policies, coupled with a contextual analysis of external factors such as EU-exit and Covid-19, established the complex landscape within which the core programmes operate. A comprehensive literature review underscored the necessity of tailored, responsive export support programmes.

Insights from the core export support programmes' rationale, inputs, and research activities highlighted a strategic focus on enhancing Welsh businesses' export capabilities through proactive engagement, financial support, and capability building. The evolution of support mechanisms, informed by past evaluations and stakeholder feedback, signified the core programmes' adaptive approach to meeting the dynamic needs of Welsh businesses.

An assessment of the management and governance of the core export support programmes revealed a commitment to continuous improvement, with adaptations in response to identified challenges and stakeholder needs. Monitoring and data gathering practices underscored a systematic approach to capturing the core programmes' impact, although the need for specific, measurable targets was evident.

Emerging outcomes and impacts, while preliminary, indicated the core export support programmes' potential in fostering export growth, diversification, and resilience amongst Welsh businesses. Stakeholders emphasised the importance of the export support in facilitating market entry and expansion, particularly in navigating the post-EU-exit landscape.

10.12. Early indications

While these efforts mark significant progress, the evaluation pinpointed areas requiring further development to enhance the WG export support's overall effectiveness and its contribution to the Welsh economy. These are as follows:

Resource optimisation for Trade Missions: It was recommended that the WG Export Team conducts a comparison of current trade event delivery levels against previous years to determine if additional resources are needed, with scope to consider hiring additional staff, or reallocating resources from other core programmes to the trade mission team.

System of target-setting: Despite some targets featuring in the Trade and Invest internal Delivery Plan, the research identified potential to develop a comprehensive set of specific, measurable targets across all major performance areas to assess the contribution of the core export support programmes to business growth. Suggested targets included:

- number of businesses supported
- number of first-time exporters supported
- increase in total export sales
- export growth achieved by supported businesses

Enhance collaboration and transparency: Given the potential similarity between WG and DBT in terms of their export support offer, it was suggested that both organisations explore ways of establishing some form of partnership agreement which sets out roles and approaches to working with exporting businesses in Wales.

Annex C: Survey questionnaires

10.13. Beneficiary survey questionnaire

Section 1: Business characteristics

We would like to understand some basic information about your business. This helps us assess the diversity of companies benefiting from export support and better tailor the Welsh Government export support services. Your answer to the next question will remain confidential and will not be shared with the Welsh Government or any other parties.

1. What is the name of your business? (If possible, please use the official registered name)

2. According to the Welsh Government records, your business has received support from the Welsh Government WG Export Team. If your business has indeed received this support, please indicate below. If your business has not received this support, please leave this option blank, selecting all other options that apply. Please select all organisations from which your business has received export support (financial or advisory) between April 2017 and March 2024.
    - The Welsh Government Export Team
    - British Chambers of Commerce/Chambers Wales
    - UK Government – Department of Business and Trade
    - Local Authority export support
    - Other (please specify):

3. As you have indicated that your business has not received support from the Welsh Government, would you be interested in completing a non-beneficiary survey? If so, please provide your email address below, and a link to the survey will be sent to you. If you are not interested in completing the survey, this survey will end when you click 'Next.'

4. Where is your business headquartered?
    - North Wales (Anglesey, Conwy, Denbighshire, Flintshire, Gwynedd, Wrexham)
    - Mid and West Wales (Ceredigion, Carmarthenshire, Pembrokeshire, Powys)
    - South Wales West (Bridgend, Neath Port Talbot, Swansea)
    - South Wales East (Blaenau Gwent, Caerphilly, Monmouthshire, Newport, Torfaen)
    - South Wales Central (Cardiff, Merthyr Tydfil, Rhondda Cynon Taf, Vale of Glamorgan)
    - Other UK nation (please specify)
    - Other (please specify):

5. Is your business primarily based in Wales as of the 5th of April 2023?
    - Yes, the majority of our operations are located in Wales.
    - No, the majority of our operations are outside Wales but we have significant activities in Wales.
    - No, we have minimal or no operations in Wales.
    - No, but we are planning to relocate or expand significantly into Wales.

6. Please specify the location of your primary operations if outside Wales and describe any plans for expansion or relocation, including how these might impact your operations in Wales.

7. How many people were employed by your business within Wales before you started receiving financial or advisory support from the Welsh Government export support team?
   - 1-10 (Micro)
   - 11-50 (Small)
   - 51-249 (Medium)
   - 250+ (Large)

8. As of the 5th of April 2024, how many staff are employed by your business within Wales?
   - 1-10 (Micro)
   - 11-50 (Small)
   - 51-249 (Medium)
   - 250+ (Large)

Please provide any additional details about your workforce size after receiving support, especially if your employment numbers changed significantly without crossing into a different size category

9. What sector(s) does your business operate in? Please select all that apply.
   - Agriculture, Forestry and Fishing
   - Mining and Quarrying
   - Manufacturing
   - Electricity, gas, steam and air conditioning supply
   - Water supply, sewerage, waste management and remediation activities
   - Construction
   - Wholesale and retail trade; repair of motor vehicles and motorcycles
   - Transportation and storage
   - Accommodation and food service activities
   - Information and Communication
   - Financial and insurance activities
   - Real estate activities
   - Professional, scientific and technical activities
   - Administrative and support service activities
   - Public administration and defence; compulsory social security
   - Education
   - Human health and social work activities
   - Arts, entertainment and recreation
   - Other service activities
   - Activities of households as employers; undifferentiated goods/services and producing activities of households for own use
   - Activities of extraterritorial organisations and bodies
   - Other (please specify):

Section 2: Exporting behaviour

This section is focused on gathering insights about the your export activities.

10. Does your business currently export goods, services, or both?
    - Goods
    - Services
    - Both
    - My business does not export currently

11. Which option best describes your business?
    - We exported within the last 6 years and have plans to export in the future
    - We exported within the last 6 years but we currently do not export or have plans to export in the future
    - We have not exported within the last 6 years, but we have plans to export in the future
    - We have not exported within the last 6 years and we do not have plans to export in the future

12. Which programme(s) did your business access from the Welsh Government export support team (International Trade Development (ITD), International Trade Opportunities (ITO), Overseas Business Development Visits (OBDV), Exhibitions and Trade Missions)?

13. Were there any benefits to your participation in the programme (e.g. changes in business plans and decision-making processes)?

14. In which year did your business first start exporting?
    - Prior to 2017
    - 2017
    - 2018
    - 2019
    - 2020
    - 2021
    - 2022
    - 2023
    - 2024

15. Which international markets has your business exported to? Tick all that apply
    - United States
    - Germany
    - Ireland
    - Netherlands
    - France
    - China
    - Canada
    - Belgium

- Spain
- Italy
- Other EU countries (please specify)
- Other countries (please specify):

Section 3: Support received

The following questions relate specifically to the support you received from the export support team.

16. Please rate the significance of each factor listed below that influenced your decision to seek support from the Welsh Government export support team. For any factors not listed, please specify in the comment box.

    Not a factor, Slightly important, Moderately important, Highly important

    Factors Influencing Support Decision: A need to…

- Enhance business performance through increased trade and exports
- Safeguard jobs within the company long-term
- Expand export activities and reach new markets
- Gain better understanding and navigation of exporting opportunities
- Find and connect with international customers
- Address gaps in company's internal exporting expertise
- Adapt the business to changes in trade regulations after the EU exit
- Manage challenges related to global economic uncertainties and supply chain disruptions
- Take advantage of new free trade agreements
- Other (please specify)

17. Please indicate whether your company faced any of these listed export-related challenges, and to what extent the support you received from the Welsh Government helped overcome these challenges. If this was not a challenge your business faced, please leave the row blank.

    Support minimally helped, Support moderately helped, Support substantially helped

- Export Challenges
- Market (country) barriers
- Market selection
- Market intelligence
- Regulatory barriers
- High costs
- Unfavourable exchange rates
- Shipping and logistics issues
- Cultural and language barriers
- Economic uncertainties (e.g., Covid-19, EU-exit)
- Competition in international markets
- Intellectual property concerns

- Technological challenges
- Internal resource constraints
- Limited internal expertise
- Please use the comment box to specify any other challenges and/or expand on the answers you have provided above.

18. Is your business a member of one of the following Welsh Government Export Clusters? (Please tick the one that applies)
    - Clean Energy and Renewables
    - Consumer Products
    - High Value Manufacturing
    - MedTech & Diagnostics
    - Technology
    - Food and Drink
    - None of the above

19. Please indicate which types of one-to-one support offered by the Welsh Government your business has received, and rate their impact on your export sales. If you did not receive that type of support, please leave the row blank.

    Low Impact, Medium Impact, High Impact, No Impact

    Support Area:

    - ITD (International Trade Development)
    - ITO (International Trade Opportunities)
    - OBDV (Overseas Business Development Visits)
    - Overseas trade missions/ exhibitions (physical)
    - Overseas trade missions / exhibitions (virtual)
    - International Trade Adviser
    - IM4H (International Manager for Hire)
    - Other (please specify):

20. Please indicate which types of one-to-many support offered by the Welsh Government your business has received, and rate their impact on your export sales. If you did not receive that type of support, please leave the row blank.

    Low Impact, Medium Impact, High Impact, No Impact

Support Area:

- Workshops and Webinars
- Events (Conference)
- Export Cluster Programme
- New Exporter Programme
- Overseas trade missions / exhibitions (physical)
- Overseas trade missions / exhibitions (virtual)
- Other (please specify):

21. Please indicate which types of online support offered by the Welsh Government your business has received, and rate their impact on your export sales. If you did not receive that type of support, please leave the row blank.

    Low Impact, Medium Impact, High Impact, No Impact

    Support Area:

- Online Export Training (BOSS)
- Export Hub
- Other (please specify):

The next question asks about when you have received export support from the Welsh Government, based on calendar years. In each column please select the year that applies.

22. Thinking specifically of the core export support programmes (ITO, ITD, OBDV or Overseas missions / exhibitions) in which year did your business first, and most recently, receive export support from the Welsh Government export support team?

- Prior to 2017
- 2017
- 2018
- 2019
- 2020
- 2021
- 2022
- 2023
- 2024

    Most recently received support

- Prior to 2017
- 2017
- 2018
- 2019
- 2020
- 2021
- 2022
- 2023
- 2024

Comment:

23. Has your business's turnover changed during the period since you received export support from the Welsh Government?

- Yes, it has increased
- Yes, it has decreased
- No, it has remained the same
- Unsure

24. What was the approximate turnover of your business in the following years?

    If you are unsure of your turnover for a particular year, please provide your best estimate, otherwise leave that year blank.

2017	2018	2019	2020	2021	2022	2023	2024

£

25. Have your business's export sales changed during the period since you received export support from the Welsh Government?
    - Yes, it increased
    - Yes, it decreased
    - No, it remained the same
    - Unsure

Comment:

26. What was the approximate total value of your export sales in the following years?

Specify 0 if you did not export in a particular year. If you are unsure of your export sales for a particular year, please provide your best estimate, otherwise leave that year blank.

2017	2018	2019	2020	2021	2022	2023	2024

£

27. To what extent would you agree that any changes in the value of your export sales can be attributed directly to the Welsh Government export support received?

    Strongly agree, Agree, Neither agree nor disagree, Disagree, Strongly disagree

Comment:

28. Reflecting on your experience with the Welsh Government export support programmes, please rate the following statements regarding the support delivery process.

    Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree

    - The application process for receiving support was straightforward and well guided
    - Support was received in a timely manner after application.
    - The communication from the support team was clear and helpful throughout the process.
    - The overall support delivery was well organised and timely
    - Please feel free to tell us more about your experience of the export support delivery process here:

Section 4: Impact of support

Please reflect on the immediate and longer-term impacts of the Welsh Government export support you received, focusing on how it has influenced your business operations and growth.

29. What was the estimated total financial investment required from your business to participate in the Welsh Government export support programmes (including travel, time, fees, etc.)? Please specify the estimated amount in £. If not known, please leave blank.

30. Thinking about the money and time your business spent on export activities due to participating in the Welsh Government export support programme, how would you rate the overall value of the programme? (1 represents ‘Very Poor Value’ and 5 represents ‘Excellent Value’). Please move the blue dot along the slider to change the rating.

31. How many additional countries have you exported to as a result of receiving export support from the Welsh Government?
    - 1
    - 2
    - 3
    - 4
    - 5
    - More than 5
    - Unsure
    - N/A

32. To which new countries did you begin exporting after receiving export support from the Welsh Government? Please list in the comment box.

33. Have you expanded your export activities into new sectors as a result of the support received?
    - Yes
    - No

34. Please specify the sector(s):

Please indicate any changes you have made in the following areas of your business as a result of the support received from the Welsh Government export support team.

35. Have you introduced or improved products / services as a result of the support you received from the Welsh Government?
    - Introduced new products / services
    - Improved existing products / services
    - Both introduced new products / services and improved existing products / services
    - Neither
    - N/A
    - Comment:

36. Have you increased the number of people employed at your company, or safeguarded any existing jobs, as a result of the Welsh Government support you received to develop your exporting activities?
    - Yes - increased the number of people employed

- Yes - safeguarded existing jobs
- Yes - both
- No
- N/A - we were not focused on changing employment levels at that time
- Unsure

37. Approximately how many new employees have you hired as a result of the support received from the Welsh Government for developing your exporting activities?

38. Approximately, how many existing jobs have you safeguarded as a result of the support received to develop your exporting activities?

39. Since receiving export support from the Welsh Government, how would you rate the improvement in the following areas of your business? (1 represents 'No Improvement' and 5 represents 'Significant Improvement') Please move the blue dot along the slider to change the rating.

    - Business's Export Readiness: How has the export support improved your business's overall readiness to engage in exporting?
    - Understanding of Market Opportunities: How has the export support enhanced your understanding of new and existing market opportunities through research, visits, and networking?
    - Improvement in International Trade Knowledge and Skills: How has the training and support you received improved your international trade knowledge and skills?

40. Has your awareness and utilisation of other Welsh Government export support offerings increased due to the support you have received?
    - Yes
    - No
    - Unsure
    - Comment

41. If you had not received support from the Welsh Government export support team, would you have sought alternative export support to assist you in achieving your exporting goals?
    - Yes
    - No
    - Unsure
42. From which organisation(s)?

43. If you had not received support from the Welsh Government export support team, would you still have engaged in exporting?
    - Definitely would have exported
    - Probably would have exported
    - Probably would not have exported
    - Definitely would not have exported

- Unsure

44. When do you think you would have started exporting if you had not received this support?
    - Up to 1 year later
    - Up to 2 years later
    - Up to 3 years later
    - Up to 4 years later
    - Up to 5 years later
    - 5 years and more later
    - Never
    - Unsure

Section 5: Future export activities

45. Looking forward, what potential barriers could impact your export activities? Please consider the following and rate the likely impact in each case.

    High, Medium, Low, No Impact

    - Potential Barriers
    - Economic Conditions (e.g., downturns, volatility)
    - Regulatory Changes (e.g., new laws, trade agreements
    - Competitive Pressures (e.g., competition, saturation)
    - Supply Chain Issues (e.g., disruptions, costs)
    - Technological Advances (e.g., new tech, innovations)
    - Political Instability (e.g., leadership changes)
    - Other (please specify):

46. For the barriers you indicated as having a ‘high’ or ‘medium’ potential impact, do you believe the Welsh Government export support team can assist your business in overcoming these barriers?

    Yes, No, Unsure

    - Anticipated Barriers
    - Economic Conditions
    - Regulatory Changes
    - Competitive Pressures
    - Supply Chain Issues
    - Technological Advances
    - Political Instability
    - Comment:

47. Are there areas where you would have liked to receive more export support from the Welsh Government?

48. Would you be willing to take part in an interview to discuss the support you received? The interview will take place via Microsoft Teams with a member of Miller Research and

will last approximately 45-60 minutes. Please note that the information you provide will be anonymised in accordance with our data protection policy and privacy notice.

- Yes
- No

49. Please provide your email address:

50. Would you be willing to be contacted by the Welsh Government after completion of this project for future business-related research, yet to be specified? You have the option to opt out of participating at any time.
    - Yes
    - No

51. Please provide your email address if you haven't done so already:

10.14. Non-beneficiary survey questionnaire

Section 1: Business characteristics

In this section, we will ask you to provide details about your business's location, sector and size. Your answer to the next question will remain confidential and will not be shared with the Welsh Government or any other parties.

1. What is the name of your business? (If possible, please use the official registered name)

2. The Welsh Government has export support programmes that offer the following types of support:

   One to One Support:

- ITD (International Trade Development): Support for market research and qualification.
- ITO (International Trade Opportunities): Help in identifying and securing in-market opportunities.
- OBDV (Overseas Business Development Visits): Grants to support travel for developing export business.
- Overseas trade missions/exhibitions (physical): Assistance with attending and participating in international market visits.

   One to Many Support:

- Workshops and Webinars: Interactive sessions designed to enhance export skills and knowledge.
- Events (Conference): Annual export conferences to promote export opportunities and provide networking.
- Export Cluster Programme: Online and in person events coordinated to bring together networks of businesses grouped by subsector e.g. Technology

- New Exporter Programme: Intensive support for businesses aiming to become new exporters.
- Market Visits: Assistance with attending and participating in international market visits.
- Exhibitions: Support for participating in international trade exhibitions and fairs.

Online Support:

- Export Hub: A digital hub providing in-depth guidance on various aspects of exporting.
- BOSS Training: Provides online training modules and resources for businesses to build export skills.

In the period of 2017-2024, have you received export support from the Welsh Government export support team through one of these programmes?

- Yes
- No

3. As you have indicated that your business has received export support from the Welsh Government you should complete the beneficiary survey rather than this, non-beneficiary survey. To access that survey, please provide your email address below and a link will be sent to you. If you'd rather not, simply click 'Next' and this survey will end.

4. Where is your business headquartered?

- North Wales (Anglesey, Conwy, Denbighshire, Flintshire, Gwynedd, Wrexham)
- Mid and West Wales (Ceredigion, Carmarthenshire, Pembrokeshire, Powys)
- South Wales West (Bridgend, Neath Port Talbot, Swansea)
- South Wales East (Blaenau Gwent, Caerphilly, Monmouthshire, Newport, Torfaen)
- South Wales Central (Cardiff, Merthyr Tydfil, Rhondda Cynon Taf, Vale of Glamorgan)
- Other (please specify):

5. Is your business primarily based in Wales as of the 5th of April 2023?

- Yes, the majority of our operations are located in Wales
- No, the majority of our operations are outside Wales, but we have significant activities in Wales
- No, we have minimal or no operations in Wales
- No, but we are planning to relocate or expand significantly into Wales

6. Please specify the location of your primary operations if outside Wales.

7. As of the 5th of April 2024, how many staff are employed by your business within Wales?

- 1-10 (Micro)
- 11-50 (Small)
- 51-249 (Medium)

- 250+ (Large)

8. What sector(s) does your business operate in? Please select all that apply.
- Agriculture, Forestry and Fishing
- Mining and Quarrying
- Manufacturing
- Electricity, gas, steam and air conditioning supply
- Water supply, sewerage, waste management and remediation activities
- Construction
- Wholesale and retail trade; repair of motor vehicles and motorcycles
- Transportation and storage
- Accommodation and food service activities
- Information and Communication
- Financial and insurance activities
- Real estate activities
- Professional, scientific and technical activities
- Administrative and support service activities
- Public administration and defence; compulsory social security
- Education
- Human health and social work activities
- Arts, entertainment and recreation
- Other service activities
- Activities of households as employers; undifferentiated goods/services and producing activities of households for own use
- Activities of extraterritorial organisations and bodies
- Other (please specify):

Section 2: Exporting behaviour

This section is focused on gathering insights about your export activities.

9. Does your business currently export goods, services, or both?
- Goods
- Services
- Both
- My business does not export currently

10. Which option best describes your business?
- We exported within the last 6 years, are currently exporting, and have plans to continue exporting in the future
- We exported within the last 6 years and have plans to export in the future
- We exported within the last 6 years but we currently do not export or have plans to export in the future
- We have not exported within the last 6 years, but we have plans to export in the future
- We have not exported within the last 6 years and we do not have plans to export in the future

11. In which year did your business first start exporting?
- Prior to 2017
- 2017
- 2018
- 2019
- 2020
- 2021
- 2022
- 2023
- 2024

12. Which international markets has your business exported to? Tick all that apply
- United States
- Germany
- Ireland
- Netherlands
- France
- China
- Canada
- Belgium
- Spain
- Italy
- Other countries (please specify):

Section 3: Financial performance and export impact

This section aims to understand your business's financial performance and the impact of your export activities.

13. Has your business's turnover changed during the period since you began exporting?
- Yes, it has increased
- Yes, it has decreased
- No, it has remained the same
- Unsure

14. What was the approximate turnover in £ of your business in the following years? If you are unsure of your turnover for a particular year, please provide your best estimate, otherwise leave that year blank.

	2017	2018	2019	2020	2021	2022	2023	2024
£								

15. What do you attribute this change in turnover to? (Please tick all that apply)
- Increased market demand
- Expansion into new markets
- Enhanced product/service offering

- Cost reduction strategies
- Marketing and promotion efforts
- Supply chain improvements
- Favourable exchange rates
- Economic growth
- Government policies or incentives
- Technological advancements
- Increased competition
- Other (please specify):

16. Have your business's export sales changed during the period since 2016 or the year before you began exporting, whichever is later?

- Yes, it increased
- Yes, it decreased
- No, it remained the same
- Unsure
- Comment:

17. What was the approximate total value of your export sales (in £) in the following years? Specify 0 if you did not export in a particular year. If you are unsure of your export sales for a particular year, please provide your best estimate, otherwise leave that year blank.

	2017	2018	2019	2020	2021	2022	2023	2024
£								

18. Approximately how much investment in GBP (£) did your company allocate towards exporting activities in the past 24 months (e.g., market research, trade missions, marketing)?

Section 4: Export challenges and support preferences

This section aims to identify the challenges your business faces in exporting and the types of support that could potentially help you expand your export activities.

19. Listed below are various export related challenges businesses may face when exporting their goods and services. Has your business encountered any of the following challenges?

Yes No

- Export Challenges
- Market (country) barriers
- Market selection
- Market intelligence
- Regulatory barriers
- High costs
- Unfavourable exchange rates

- Shipping and logistics issues
- Cultural and language barriers
- Economic uncertainties (e.g., Covid-19, EU-exit)
- Competition in international markets
- Intellectual property concerns
- Technological challenges
- Internal resource constraints
- Limited internal expertise

Please use the comment box to specify any other challenges and/or expand on the answers you have provided above.

20. Are you aware that the Welsh Government offers export support programmes to Welsh businesses?
- Yes
- No

21. If you had known about the Welsh Government export support programmes, would you have sought support from them?
- Yes
- No
- Unsure

22. Which type(s) of support might you have sought from the Welsh Government export support team? (Select all that apply)
- Market Research and intelligence (Market reports and analysis, overseas market research services, industry-specific intelligence)
- Export advice and consultancy (export readiness assessment, market selection advice, legal and regulatory advice)
- Financial support (Export funding grants e.g., for trade missions, exhibitions, market development grants)
- Training and workshops (Export skills workshops and webinars, masterclasses in export marketing and sales strategies, compliance and documentation training)
- Trade missions and exhibitions (participation in international trade missions, support for exhibiting at overseas trade fairs, virtual trade missions and events)
- Business-to-Business matching (Introductions to potential partners, distributors, or buyers)
- Networking support (Networking with other Welsh exporters)
- Digital export support (Online marketing and e-commerce advice, website localisation and international SEO)
- Other (please specify):

23. What are the reasons you might not seek export support from the Welsh Government? (Select all that apply)
- Perceived complexity of the application process
- Previous negative experiences with Welsh Government support
- Belief that the available support would not meet our business needs

- Sufficient internal resources to manage exporting independently
- Other (please specify):

24. Have you sought export support (financial or advisory) from any of the following organisations between April 2017 and March 2024? (Please select all that apply):

- British Chambers of Commerce/Chambers Wales
- UK Government – Department of Business and Trade
- Local Authority export
- None of the above
- Other (please specify):

Please share any specific experiences or feedback you have regarding the export support you sought and/or received)

25. How many additional countries have you exported to in the past 24 months?

- 0
- 1
- 2
- 3
- 4
- 5
- More than 5
- Unsure
- N/A

26. To which new countries did you begin exporting in the past 24 months?

27. Have you expanded your export activities into new sectors in the past 24 months?

- Yes
- No

28. Please specify the sector(s):

29. Have you introduced or improved products / services in the past 24 months?

- Introduced new products / services
- Improved existing products / services
- Both introduced new products / services and improved existing products / services
- Neither
- N/A
- Comment:

30. Have you increased the number of people employed at your company, or safeguarded any existing jobs in the past 24 months?

- Yes - increased the number of people employed
- Yes - safeguarded existing jobs
- Yes - both
- No

- N/A - we were not focused on changing employment levels at that time
- Unsure

31. Approximately how many new employees have you hired in the past 24 months?

32. Approximately how many existing jobs have you safeguarded in the past 24 months?

Section 5: Future export plans and support preferences

This section seeks to understand your future export intentions and the specific types of support that would aid your business. It also seeks to understand your preferences for different support services.

33. What type of support would you find most beneficial in helping your business expand its export activities? (Please select all that apply)

- Expert technical advice
- Training and workshops
- Expert marketing advice
- One-to-one exporting advice
- Travel/accommodation support
- Legal and regulatory assistance
- Funding for international business development
- International market event participation
- Market research support
- Preparing to export training
- Other (please specify):

Section 6: Business development and satisfaction

This final section considers your business's export readiness and satisfaction with current processes and gathers feedback on how government support could be more effectively tailored to meet your needs.

34. How would you rate the level of improvement your business requires in the following areas to enhance your export activities?

    No improvement needed, Some improvement needed, Significant improvement needed

- Business Area
- Export readiness
- Understanding of market opportunities
- International trade knowledge and skills
- Internal exporting expertise
- Finding and connecting with international customers
- Adapting to trade regulations
- Comment:

35. If you have any additional comments or suggestions regarding the Welsh Government's export support services, please provide them in the comment box below.

36. Would you be willing to be contacted by the Welsh Government after completion of this project for future business-related research (yet to be specified)? You have the option to opt out of participating at any time. Selecting ‘no’ will end the survey, you will not be able to return to your answers.

- Yes
- No

37. Please provide your name and email address below:
    Comment box

Annex D: Survey respondent characteristics

10.15. Note on response totals and skip logic

Both the beneficiary and non-beneficiary surveys were administered using SmartSurvey, which allows for skip logic and non-mandatory question formats. As a result, respondents were able to bypass questions that were not relevant to them or that they chose not to answer. This means that response totals (n values) vary between questions. All percentages are calculated based on the number of respondents who answered each specific question, rather than the total survey population.

10.16. Beneficiary business characteristics

Table AD1. Survey respondents by Wales region (n=141)

Region	Frequency	Percentage
North Wales	39	27.7
Mid Wales	17	12.0
South East Wales	61	43.3
South West Wales	24	17.0
Total	**141**	**100**

Source: Export support evaluation - beneficiary survey, 2024

Beneficiary survey respondents have been grouped by the location of their principal operational site in Wales, in line with the export programmes' eligibility criterion that beneficiary businesses must maintain an active Welsh presence. As shown in Table AD1, 60.3% (85) of respondents were located in South Wales with 43.3% in South East Wales, and 17.0% in South West Wales. North Wales hosted 27.7% of respondents, while Mid Wales accounted for 12.0%.

95.2% (138) of respondents also stated that Wales remains their primary base of operations. 4.8% (7) indicated that most of their activities occur outside Wales, reflecting the presence of multinational ownership or corporate structures. These businesses nevertheless operate Welsh-based facilities that directly benefitted from WG export support. Headquarter locations reported by respondents included cities elsewhere in the UK, the Republic of Ireland, and internationally.

10.17. Comparison with total beneficiary population: Location

Table AD2. Total beneficiary population by Wales region (n=616)

Region	Frequency	Percentage
North Wales	129	20.9
Mid Wales	44	7.1
South East Wales	328	53.2
South West Wales	115	18.7
Total	**616**	**99.9**

Source: WG Export Team data

When comparing the regional distribution of surveyed beneficiaries (Wales-based only) with the total WG export beneficiary population, the sample broadly reflects the population characteristics, but with some variation. South East Wales remains the most prominent base of operations for supported businesses, accounting for 42.6% (61) of survey respondents as opposed to 53.2% (328) of the total beneficiary population. North and Mid Wales are slightly overrepresented among survey respondents – by 6.3 and 5.4 percentage points respectively - suggesting that these regions may have had comparatively higher engagement with the survey. South West Wales shows close alignment between sample and population.

Table AD3. Beneficiary respondents' business size prior to WG export support (n=137)

Company size (range)	Frequency	Percentage
1-10 (Micro)	71	51.8
11-50 (Small)	41	29.9
51-249 (Medium)	24	17.5
250+ (Large)	1	0.7
Total	**137**	**100**

Source: Export support evaluation - beneficiary survey, 2024

Businesses were asked about the number of employees they had in Wales before they started receiving financial or advisory support from the WG Export Team. The results set out in Table AD3 show that most businesses were small enterprises, with 51.8% (71) categorised as micro-businesses (1-10 employees) and 29.9% (41) as small businesses (11-50 employees). 17.5% (of businesses were medium-sized (51-249 employees), while only 0.7% classified as large (250+ employees). Five businesses provided additional qualitative feedback on employment size.

Qualitative feedback

Staff reductions were noted by 2 businesses due to market conditions, while 3 highlighted that they operate as sole traders or freelancers.

10.18. Comparison with total beneficiary population: Size

Table AD4. Total beneficiary population business size (n=544)[footnote36]

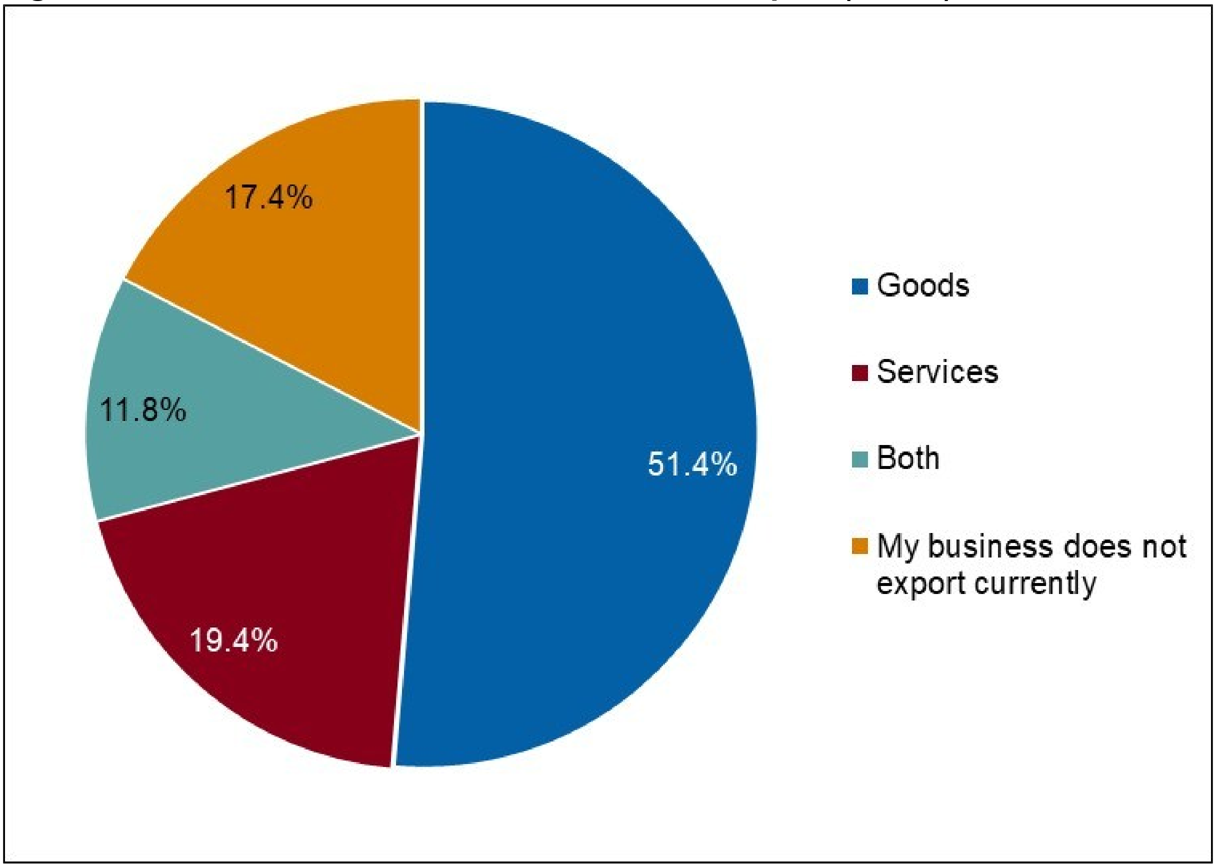
Company size (range)	Frequency	Percentage
1-10 (Micro)	232	42.6
11-50 (Small)	187	34.4
51-249 (Medium)	106	19.5
250+ (Large)	19	3.5
Total	**544**	**100.0**

Sources: WG Export Team data and FAME Database, 2024

Table AD4 shows that the survey sample broadly reflects the size profile of the total beneficiary population, though with some variation. Among survey respondents, micro-businesses (1-10 employees) were the most common, accounting for 51.8% (71) of responses, compared with 42.6% (232) of the total beneficiary population. Small businesses (11-50 employees) were similarly represented – with 29.9% (41) in the survey versus 34.4% (167) in the overall population. Medium-sized businesses (51-249 employees) made up 17.5% (24) of survey respondents, closely aligning with the 19.5% (106) seen in the full beneficiary dataset. Large businesses (250+ employees) were underrepresented, with just 0.7% (1) in the survey compared to 3.5% (19) overall. This suggests the survey responses slightly over-represent micro-businesses and under-represent larger businesses, though the general pattern remains consistent with the total population of supported businesses. These proportions reaffirm that the WG export support is predominantly accessed by SMEs, with micro and small enterprises forming the bulk of both the wider beneficiary population, and those who responded to the survey.

[36] The data in Table AD4 report the latest available information on business size upon accessing the FAME database in May 2024.

Figure AD5. Goods and/or services businesses export (n=144)



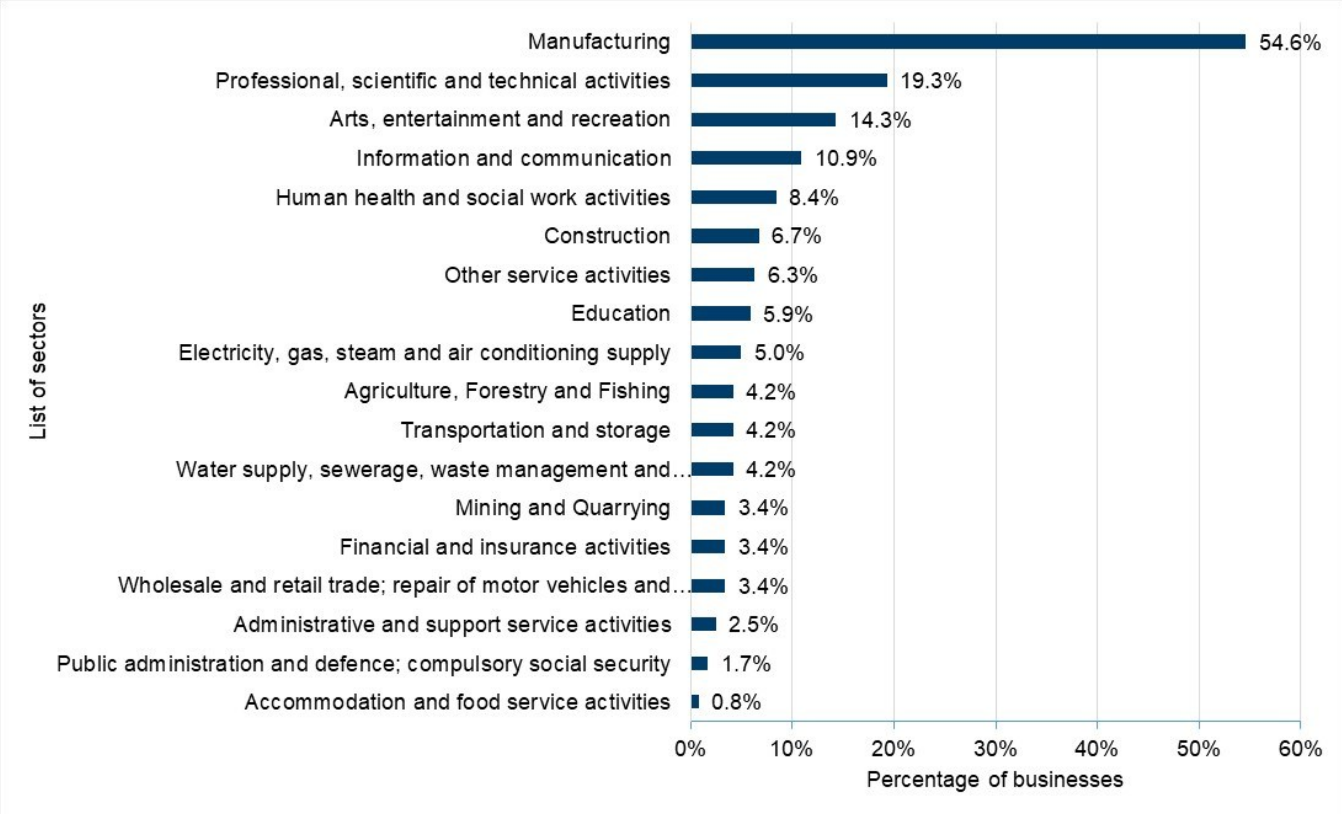
Source: Export support evaluation - beneficiary survey, 2024

As shown in Figure AD5, 51.4% (74) reported exporting goods, compared to 19.4% exporting services (28), and 11.8% (17) exporting both. Figure AD6 below shows that 54.6% of beneficiary survey respondents were from the manufacturing sector. This dominance of goods exporters aligns with the sector profile of the sample and may reflect the strong representation of product-led businesses. It also underlines the importance of support mechanisms that address physical trade barriers, certification requirements, and logistics.

17.5% (25) stated that their business does not currently export. Of these, 2 reported that they exported within the last 6 years and had plans to export in the future; 3 reported that they exported within the last 6 years; but currently do not export or have plans to export in the future; and 5 said they had not exported within the last 6 years and did not have plans to export in the future.

Businesses were also asked when they started exporting. 71.4% (n=90/126) said that they had started exporting prior to 2017.

Figure AD6. Beneficiary survey respondents' economic sector (n=119)

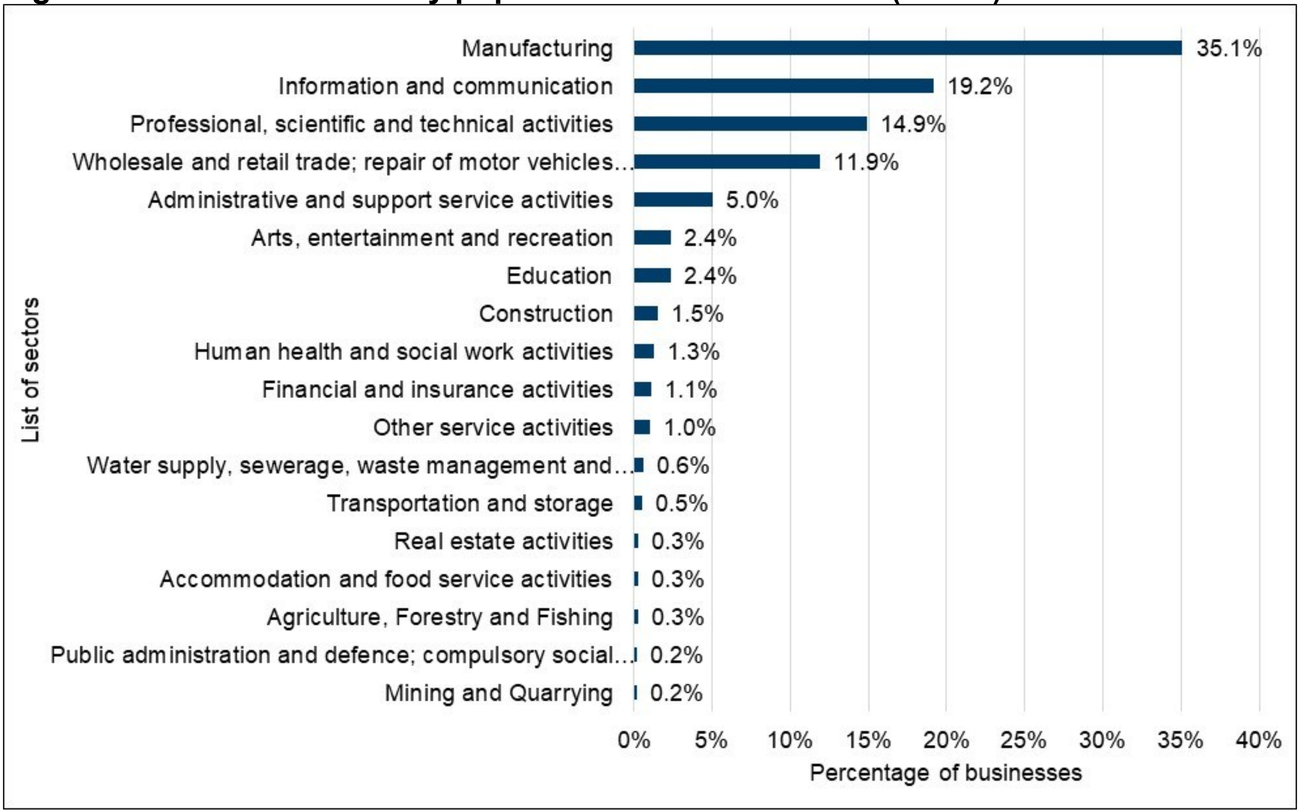


Source: Export support evaluation - beneficiary survey, 2024

Figure AD6 shows that 54.6% (65) of beneficiary survey respondents were from the manufacturing sector, making it the most represented industry. This was followed by professional, scientific, and technical activities at 19.3% (23), arts, entertainment, and recreation at 14.3% (17), information and communication at 10.9% (13), and human health and social work at 8.4% (10). While manufacturing was the most prevalent sector among respondents, the presence of knowledge-based and creative industries suggests a degree of sectoral diversity within the surveyed sample. In the other category respondents identified life sciences, renewables, aerospace and defence, software development, and healthcare as areas of activity, further illustrating the varied backgrounds of businesses engaging with Welsh Government export support.

10.19. Comparison with total beneficiary population: Sector

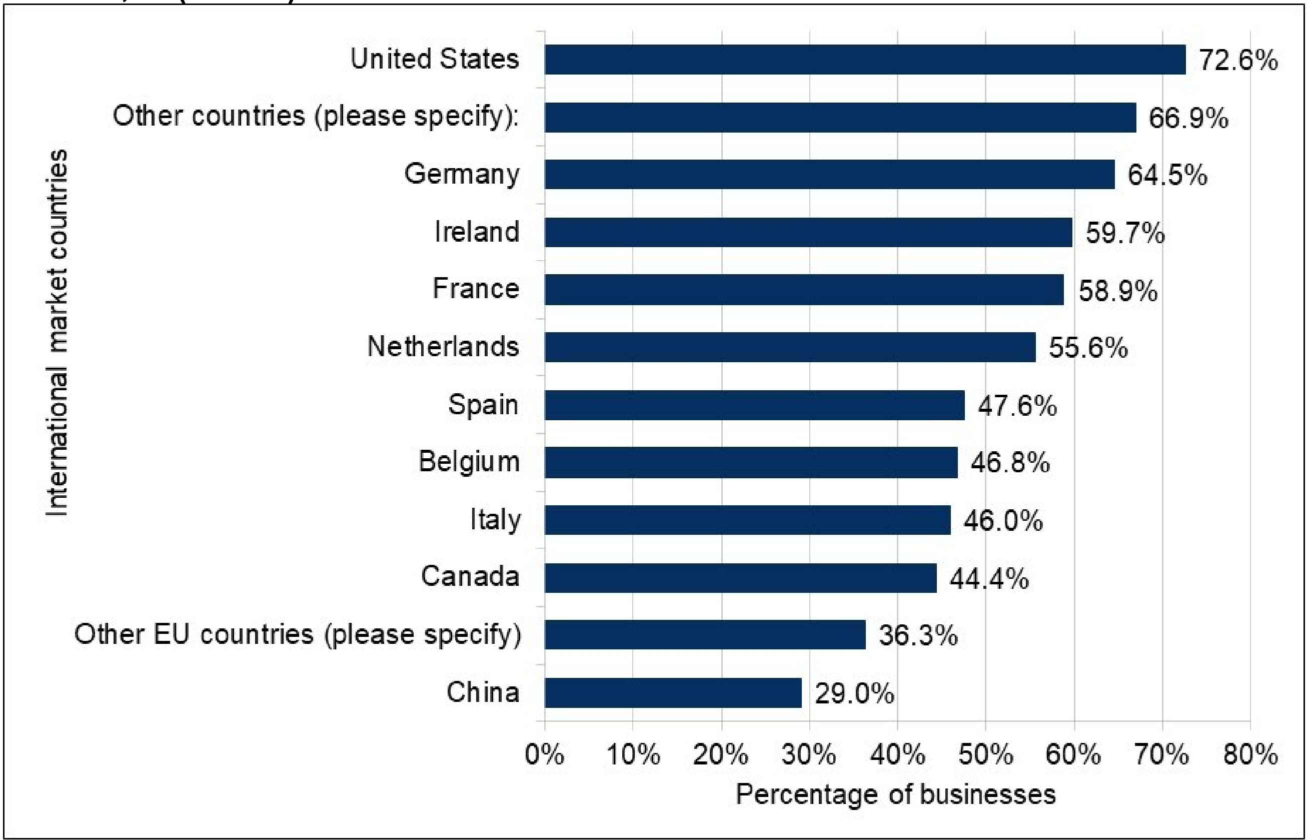
Figure AD7. Total beneficiary population economic sector (n=616)



Sources: WG Export Team data and FAME Database, 2024

The sector profile of survey respondents shows some alignment with the overall beneficiary population, though notable differences are apparent. Thus, comparing the charts in Figures AD6 and AD7, manufacturing was overrepresented in the survey sample 54.6% (65) compared with 35.1% (216) of all beneficiaries. Conversely, wholesale and retail trade with 11.9% (73) and administrative and support services with 5.0% (31) featured more in the overall beneficiary population than in survey responses. Representation of professional, scientific, and technical activities was similar across both groups – with 19.3% (23) in the survey vs 14.9% (92) overall – as was information and communication – with 10.9% (13) in the survey vs 19.2% (118) overall. This suggests that businesses in manufacturing were more predominantly represented in the survey responses, while responses from some service sectors were more limited. Nonetheless, the overall sectoral spread reflects the diverse composition of businesses supported through the Welsh Government's export programmes.

Figure AD8. Markets beneficiary respondents exported to, multiple selections allowed, % (n =124)



Source: Export support evaluation - beneficiary survey, 2024

Beneficiaries were also asked which international market their business export to. Figure AD8 reveals that the most frequently reported export destination among respondents was the USA, with 72.6% (90) of businesses exporting to this market. This was followed by a high concentration of exporters in other non-EU countries with 66.9% (83), as well as significant European markets, including Germany with 64.5% (80), the Republic of Ireland with 59.7% (74), and France with 58.9% (73). This suggests that the USA was a dominant market for beneficiary respondents, with respondents also exporting to European markets, particularly Germany, the Republic of Ireland, and France. Beyond the most commonly reported destinations, businesses also identified a diverse range of additional export markets through open-ended responses.

Qualitative feedback

Five respondents highlighted their global reach, with 2 stating they export to over 60 countries and one noting they trade in 137 countries.

A full list of countries is included in Annex E.

Annex E: New export markets (beneficiaries)

10.20. Additional countries exported to by surveyed beneficiary businesses after Welsh Government export support

Argentina	Germany	Mexico	Singapore
Australia	Hong Kong	Middle East	South Africa
Austria	Hungary	Netherlands	South America
Belgium	Iceland	New Zealand	South Korea
Brazil	Indonesia	Oman	Spain
Canada	Italy	Pakistan	Switzerland
Central America	Japan	Peru	Taiwan
Chile	Kazakhstan	Poland	Tajikistan
China	Kuwait	Qatar	United States
Costa Rica	Lithuania	Republic of Ireland	Uzbekistan
Dubai	Luxembourg	Russia	Vietnam
France	Malaysia	Saudi Arabia (KSA)	

Annex F: Non-beneficiary business characteristics

10.21. Non-beneficiary survey respondent location

Table AF1 below presents full survey responses from non-beneficiaries about business location. Only those with confirmed operational activity in Wales were included in the evaluation analysis. [footnote37]

Table AF1. Non-beneficiary survey respondents by business location in Wales region (n=107)

Region	Frequency	Percentage
North Wales	27	25.2
Mid Wales	28	26.2
South East Wales	28	26.2
South West Wales	23	21.5
Other UK nation (please specify)	1	0.9
Total	107	100.0

Source: Export support evaluation – non-beneficiary survey, 2024

Businesses were asked where their primary headquarters was located (Table AF1). Responses indicated that Welsh exporters are concentrated in South Wales, with 47.7% (51) of businesses located in the region. South East Wales accounted for 26.2% (28), followed by South West Wales which accounted for 21.5% (23).

Qualitative feedback

In qualitative comments, one business reported their headquarters as being located outside of Wales (in Switzerland) but indicated they had some operational presence in Wales.

Non-beneficiary businesses were also asked if their business was primarily based in Wales as of the 5th of April 2023. A total of 106 businesses responded to this question. Of these, 94 confirmed that the majority of their operations were located in Wales. 10 respondents reported that they had operations primarily outside Wales but did have significant activity within Wales.

In terms of respondents' primary locations, qualitative comments identified England, Sierra Leone, Canada, Switzerland, Belgium, Czech Republic, Spain, Brazil, the USA and the Middle East.

[37] One respondent reported limited or no operational footprint in Wales. Their response is included here for transparency but was excluded from the evaluation analysis.

10.22. Comparison with total non-beneficiary population: Location

Table AF2. Non-beneficiary population by Wales region (n=2,022)[footnote38]

Region	Frequency	Percentage
North Wales	586	29.0
Mid Wales	31	1.5
South East Wales	1061	52.5
South West Wales	344	17.0
Total	2,022	100.0

Source: FAME Database, 2024

When compared to the population of non-beneficiary exporters in Wales – based on a dataset of 2,022 businesses identified as exporters who had not accessed WG core export support during the evaluation timeframe – the regional spread of non-beneficiary survey respondents shows some clear imbalances. Table AF2 shows that businesses in North and Mid Wales were proportionally greater in the survey than in the population as a whole – particularly Mid Wales, which made up over a quarter of survey responses despite accounting for just 1.5% of the total exporter base. Meanwhile, South East Wales was underrepresented, with only 26.4% of survey respondents compared to more than half of all exporters in the region. South West Wales was more closely aligned. These differences suggest that while the survey provides useful insights, the views of businesses in South East Wales, where the largest concentration of exporters are based, may be somewhat under-reflected in the non-beneficiary sample.

Table AF3. Non beneficiary respondents' business size as of 5th April 2024 (n=106)

Company size (range)	Frequency	Percentage
1-10 (Micro)	61	57.0
11-50 (Small)	23	21.5
51-249 (Medium)	18	16.8
250+ (Large)	5	4.7
Total	107	100.0

Source: Export support evaluation – non-beneficiary survey, 2024

Businesses were asked about the number of employees they had in Wales as of 5th April 2024. The results shown in Table AF3 indicate that 57.0% (61) of businesses were micro-businesses (1-10 employees), followed by 21.5% (23) were small businesses (11-50 employees) and 16.8% (18) were medium businesses (51-249 employees). 4.7% businesses were classed as large (250+ employees).

[38] Differences in the base sizes in Tables AF2 and AF4 and Figure AF6 are on account of varying degrees of missing data on selected characteristics in the FAME database, which was used to generate the non-beneficiary exporter population in Wales.

10.23. Comparison with total non-beneficiary population: Size

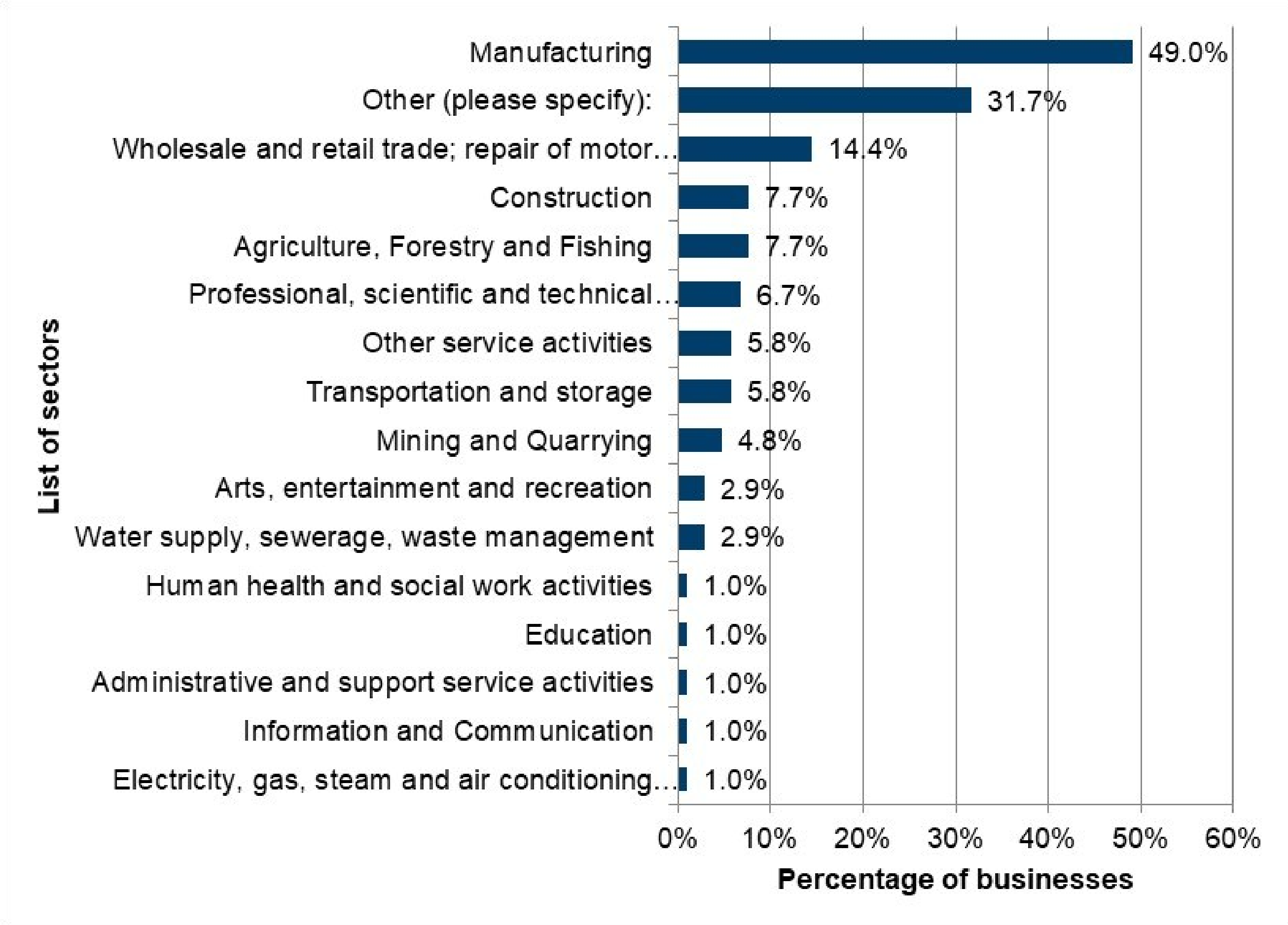
Table AF4. Total non-beneficiary businesses size as of 5th April 2024 (n=1668)

Company size (range)	Frequency	Percentage
1-10 (Micro)	911	54.6
11-50 (Small)	447	26.8
51-249 (Medium)	231	13.8
250+ (Large)	79	4.7
Total	1668	100.0

Source: FAME Database, 2024

As shown in Table AF4, the size profile of survey respondents largely mirrors that of the wider non-beneficiary business population. Micro-businesses (1-10 employees) made up 56.6% of survey responses, which is almost identical to their share in the overall non-beneficiary population (54.6%). Small businesses (11-50 employees) accounted for 21.7% of the sample, slightly lower than the 26.8% seen across the wider population. Medium-sized businesses (51-249 employees) made up 17.0% of survey responses versus 13.8% in the full population, while large businesses (250+ employees) were represented equally in both at 4.7%. Overall, the figures indicate that the survey data provides a broadly proportionate cross-section of non-beneficiary businesses by size, with only modest variation in the distribution across categories.

Figure AF5. Survey respondents' economic sector (s) (n=104)

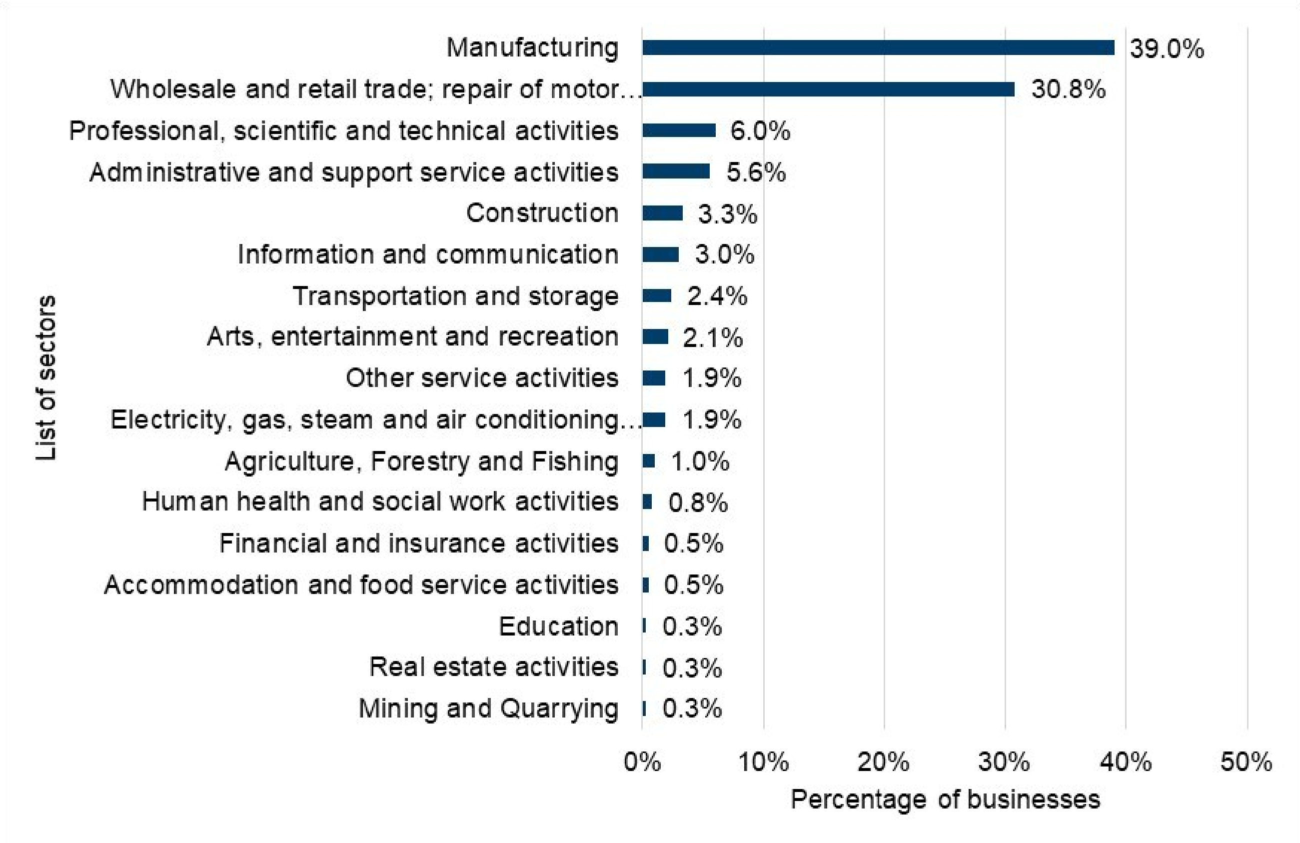


Source: Export support evaluation – non-beneficiary survey, 2024

Non-beneficiaries were asked to specify what sector(s) their business operates in. As shown in Figure AF5, 49.0% (51) of businesses stated that they operated in the manufacturing sector. 31.7% (33) selected "Other" noting retail, research, healthcare and engineering sectors in an open-ended box. This was followed by wholesale and retail trade with 14.4% (15), construction with 7.7% (8), and agriculture, forestry and fishing with 7.7% (8). Small numbers of business operated in a variety of other sectors. These results suggest that manufacturing is predominantly represented in the non-beneficiary survey responses, while responses from other sectors were more fragmented.

10.24. Comparison with total non-beneficiary population: Sector

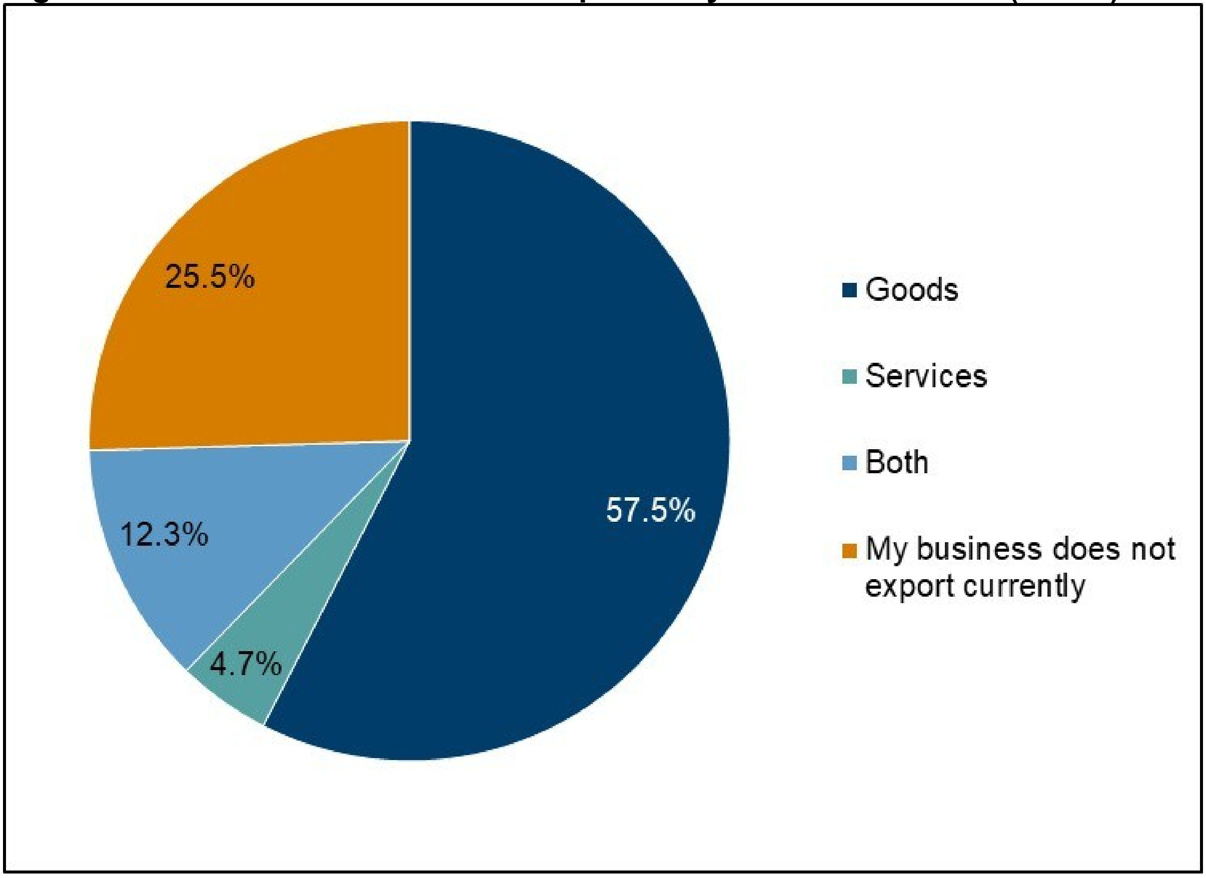
Figure AF6. Total non-beneficiary economic sector (s) (n=1829)



Source: FAME Database, 2024

The sector profile of non-beneficiary survey respondents differs notably from the broader population of non-beneficiary exporters in Wales. Manufacturing was the largest sector in both groups but was more heavily represented in the survey responses 49.0% (51) compared to 39.0% (714) in the full population. In contrast, wholesale and retail trade, which made up 30.8% (564) of the overall population, accounted for just 14.4% (15) of survey respondents, suggesting underrepresentation in this sector. Other sectors such as construction and agriculture, forestry, and fishing were slightly overrepresented in the survey with 7.7% (8) each compared with 3.3% (61) and 1.0% (19) in the population profile respectively. Meanwhile, several service-oriented sectors, such as administrative support, information and communication, and finance, were present in the population but either marginally captured or absent in the survey responses, indicating a limited sample spread across some industries. Overall, while the survey sample captured the core sectoral profile of Welsh exporters, manufacturing was somewhat more prominent in responses, suggesting that businesses in this sector may have been more engaged with the survey or tended to self-identify as exporters.

Figure AF7. Goods and/or services exported by non-beneficiaries (n=107)



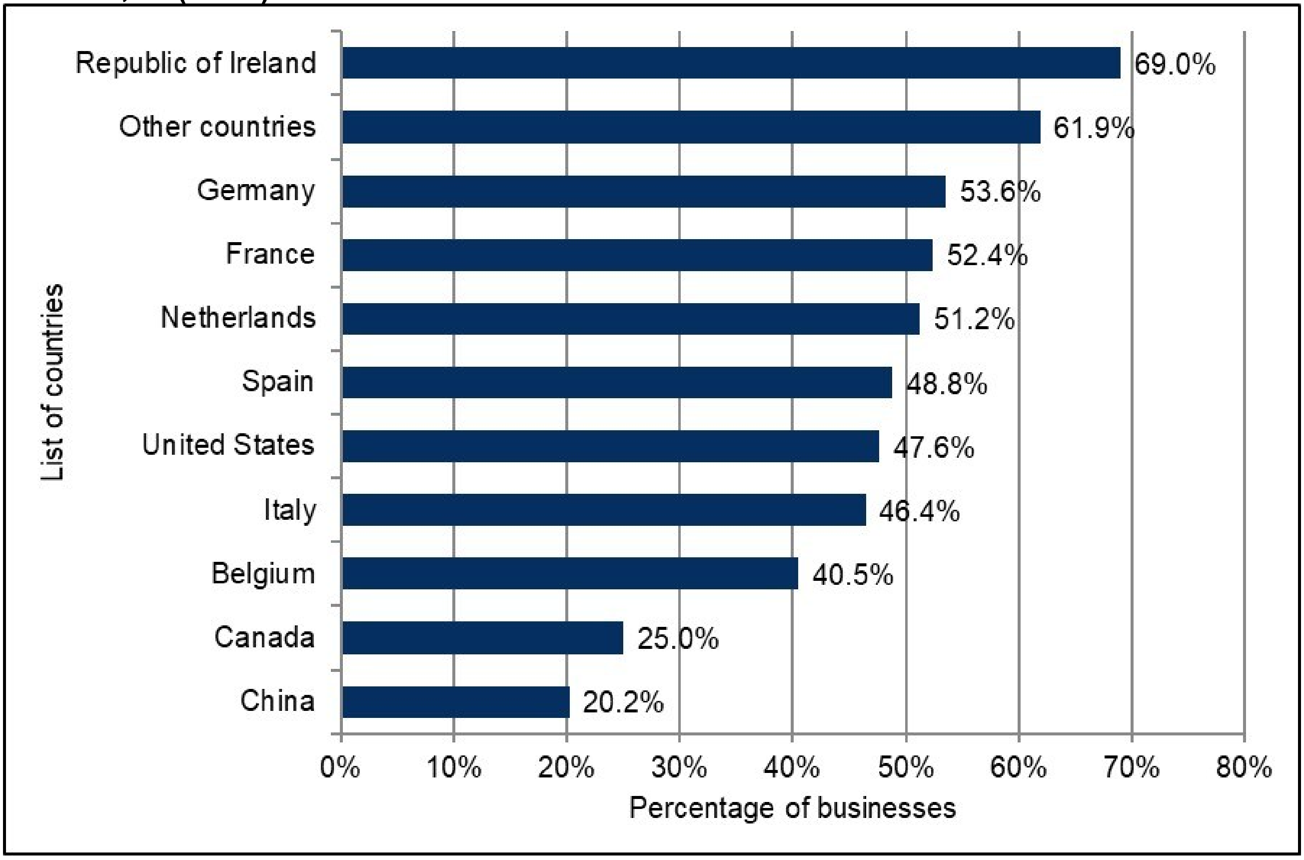
Source: Export support evaluation – non-beneficiary survey, 2024

As shown in Figure AF7, 57.5% (61) of non-beneficiary respondents reported that they exported goods, 4.7% (5) exported services, and 12.3% (13) exported both goods and services. A further 25.5% (27) stated that they did not currently export.

Of those who were not currently exporting, respondents were asked a follow-up question about their export history and future intentions. 80.8% (n=21/26) stated that they had not exported in the last 6 years and had no plans to export in future. 7.7% (n=2/26) said they had not exported in the last 6 years but planned to in future, and another 7.7% (n=2/26) said they had exported in the past 6 years and plans to in future. 3.8% (n=1/26) said they had exported in the past 6 years, but did not plan to in future.

Businesses were also asked when they had started exporting. 82.1%(n=69/84) reported that they began exporting before 2017.

Figure AF8. Markets non beneficiary businesses exported to, multiple selections allowed, % (n=84)



Source: Export support evaluation – non-beneficiary survey, 2024

Non-beneficiary respondents were asked which international market(s) they exported to. As shown in Figure AF8, the largest export location was the Republic of Ireland, with 69.0% (58) of businesses exporting there. This was followed by European countries - Germany with 53.6% (45), France with 52.4% (44), Netherlands with 51.2% (43) and Spain with 48.8% (41). The next highest export country was the US, to which 47.6% (40) of businesses exported.

61.9% (52) of businesses specified “Other” countries they exported to, a full list of which can be found in Annex G.

10.25. Cross-comparison of beneficiary and non-beneficiary business demographics

As this evaluation was commissioned retrospectively, it was not possible to design and embed a control or comparison group from the outset. This limited the ability to apply more robust counterfactual methods. In addition, the use of voluntary survey responses—while valuable for gathering insights—meant that important variables, such as business size or location, could not be controlled for without significantly reducing sample sizes, which would have limited the robustness of any subgroup analysis. As a result, while the comparisons between beneficiary and non-beneficiary groups offer beneficial findings that can help contextualise export support reach and inform future targeting, they should be interpreted cautiously and treated as indicative rather than conclusive.

In terms of regional distribution, both beneficiary and non-beneficiary respondents were heavily concentrated in South Wales, though with notable differences. Among beneficiary survey respondents, 60.3% were located in South Wales (43.3% in South East, 17.0% in South West), compared to 52.5% of the total beneficiary population in South East Wales and 18.7% in South West Wales. Among non-beneficiary respondents, 47.7% were based in South Wales (26.2% in South East and 21.5% in South West), compared to 52.5% in South East Wales and 17.0% in South West Wales across the full non-beneficiary population. North Wales showed fairly similar representation across groups: 27.7% among beneficiary respondents vs. 25.2% among non-beneficiary respondents. However, Mid Wales was more represented among beneficiaries (12.0%) than in the total beneficiary population (7.1%) or non-beneficiary population (1.5%). This suggests that while support has reached across Wales, beneficiaries were more concentrated in the South East and Mid Wales regions.

Business size shows a more pronounced contrast. Among beneficiaries, micro-businesses (1-10 employees) dominated the survey sample with 51.8%, slightly above their representation in the full population at 42.6%. In the non-beneficiary group, micro-businesses also formed the majority of survey respondents at 57.0%, closely aligned with their representation in the overall non-beneficiary population at 54.6%. However, small businesses (11–50 employees) were underrepresented in the non-beneficiary survey sample at 21.5% compared to their share in the full non-beneficiary population of 26.8%, while medium-sized businesses (51–249 employees) were slightly overrepresented (16.8% vs. 13.8%). Larger businesses (250+ employees) were equally underrepresented in both survey samples and their respective populations. These patterns suggest that while the survey samples broadly reflect the underlying business size distribution — especially among micro-businesses — the non-beneficiary sample is more closely aligned with the overall non-beneficiary population. In contrast, micro and small firms appear slightly overrepresented in the beneficiary sample relative to its wider population.

Sectorally, manufacturing was the leading sector for both groups, but with clearer dominance among beneficiaries with 54.6% of respondents operating in manufacturing, compared to 49.0% of non-beneficiaries. In contrast, wholesale and retail trade was more prevalent among non-beneficiaries (30.8% of the total population vs 14.4% in the survey).

The non-beneficiary group also showed greater presence in agriculture, construction, and other primary sectors, whereas beneficiaries were more concentrated in higher-value-added activities such as professional, scientific, and technical services.

Taken together, the data suggests that while the programmes have reached a reasonably broad segment of the exporter population, the greatest responses have been from small to medium-sized manufacturers and technical service businesses, particularly those based in South and North Wales. Non-beneficiaries appear more dispersed across sectors, such as agriculture, wholesale and retail trade, and construction.

Annex G: Current export markets (non-beneficiaries)

10.26. Full list of international countries surveyed non-beneficiary businesses currently export to

Algeria
Australia
Austria
Bahrain
Bangladesh
Barbados
Brazil
Bulgaria
Cambodia
China
Colombia
Cyprus[39]
Cyprus[40]
Czech Republic
Denmark
Dubai
Egypt
Estonia
Falkland Islands
Finland
Georgia
Germany
Ghana
Greece
Guatemala
Guinea
Hong Kong
Hungary
Iceland
India
Indonesia
Israel
Italy
Ivory Coast
Japan
Jordan
Kuwait
Laos
Latvia
Lebanon
Libya
Lithuania
Malaysia
Mali
Malta
Mauritius
Mexico
Netherlands
New Zealand
Nigeria
Norway
Oman
Pakistan
Poland
Portugal
Qatar
Republic of Ireland
Romania
Russia
Saudi Arabia
Serbia
Sierra Leone
Singapore
Slovakia
Slovenia
South Africa
South Korea
Sri Lanka
St Maarten
Sweden
Switzerland
Taiwan
Thailand
Trinidad & Tobago
Turkey
Uganda
Ukraine
United Arab Emirates
USA
Uzbekistan
Vietnam

[39] Republic of

[40] Turkish Republic of Northern

Annex H: New export markets (non-beneficiaries)

10.27. Full list of new international countries surveyed non-beneficiary businesses exported to in the past 24 months

Algeria	Germany	Nigeria	Spain
Australia	Greece	Pakistan	St Maarten
Azerbaijan	India	Philippines	Sweden
Barbados	Indonesia	Poland	Switzerland
Canada	Israel	Portugal	Taiwan
China	Italy	Republic of Ireland	Tanzania
Czech Republic	Korea	Saudi Arabia	Thailand
Denmark	Kuwait	Serbia	Uganda
Egypt	Lithuania	Seychelles	United Arab Emirates
Estonia	Malaysia	Singapore	USA
Finland	Malta	South Africa	Vietnam
France	New Zealand		