**Client**

**Invest Northern Ireland**

**Project**

**Sales and Marketing Research Project**

**Division**

**Consultancy**

Appendices Report - July 2013

**Table of Contents**

[Appendix 1: Questionnaires 3](#_Toc361735796)

[Appendix 2: Preparing to Export 61](#_Toc361735797)

[Appendix 3: Exporters Survey 77](#_Toc361735798)

[Appendix 4: Non-Exporters Survey 86](#_Toc361735799)

[APPENDIX 5: Focus Groups 98](#_Toc361735800)

[APPENDIX 6: Support Programmes 104](#_Toc361735801)

[APPENDIX 7: CIM Courses 120](#_Toc361735802)

[APPENDIX 8: WORKING FUTURES DATA 128](#_Toc361735803)

Appendix 1: Questionnaires

**Exporters Survey**

**Background to the research**

RSM McClure Watters have been commissioned by Invest NI, Department for Employment and Learning (DEL) and the Department for Enterprise, Trade and Investment (DETI) to assess professional sales, strategic export marketing and international business communication skills in the Northern Ireland workforce.

The purpose of this research study is to make recommendations to address any needs identified in the course of this review.

**Who should complete this questionnaire?**

This questionnaire should be completed by companies already exporting, particularly those exporting outside of the UK and ROI to non-English speaking countries (Note: there is a questionnaire for companies already exporting, a questionnaire for those preparing to export and those who don’t export).

**Timescales**

The deadline for completion is **24th January 2013.**

**Important notes on completing the questionnaire**

* The questionnaire will take approximately 15-20 minutes to complete. For some respondents, the time required may be slightly more, for others it may be slightly less. We appreciate the investment of your time in this important research.
* If you require any assistance or have any queries please do not hesitate to contact Karyn Millar at RSM McClure Watters on **02890 23 43 43** or at [karyn.millar@rsmmcw.com](mailto:karyn.millar@rsmmcw.com)

**Confidentiality**

All responses will be treated in confidence by RSM McClure Watters.

**Section A: General Information and Background**

|  |  |  |
| --- | --- | --- |
| **Q** | **Individual / Organisation Details** | |
|  | Business Name |  |
| Individual Name |  |
| Job Title / Role |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Q** | **How many employees are there in your company at present?** *Tick one* | | | | |
|  | <10 |  |  | 250 – 499 |  |
| 10 – 49 |  |  | 500 – 999 |  |
| 50 – 249 |  |  | 1000 + | ***- If 1000+, Please specify****:* |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Q** | **What sector is your company in?** *Tick one* | | | |
|  | Agriculture, Forestry and Fishing |  | Real Estate Activities |  |
| Mining and Quarrying |  | Professional, Scientific and Technical Activities |  |
| Manufacturing |  | Administrative and Support Service Activities |  |
| Electricity, Gas, Steam and Air Conditioning |  | Public Administration and Defence; Compulsory Social Security |  |
| Water Supply: Sewerage, Waste Management and Remediation Activities |  | Education |  |
| Construction |  | Human Health and Social Work Activities |  |
| Wholesale and Retail Trade: Repair of Motor Vehicles and Motorcycles |  | Arts, Entertainment and Recreation |  |
| Transportation and Storage |  | Other Service Activities |  |
| Accommodation and Food Service Activities |  | Activities of Households as Employers; Undifferentiated Goods- and Services-Producing Activities of Households for own use |  |
| Information and Communication |  | Activities of Extraterritorial Organisations and Bodies |  |
| Financial and Insurance Activities |  | Other - **Please specify**: |  |

| **Q** | **Where are you located?** *Please detail your head office Post Code.* |
| --- | --- |
|  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Q** | **How long has your company been trading?** *Tick one* | | | | |
|  | 1 to 5 years |  |  | 6 to 10 years |  |
| 11 to 15 years |  |  | 16 to 20 years |  |
| 21 to 25 years |  |  | More than 25  years\* | **- \*Please specify:** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you have someone responsible for exporting at a senior level (i.e. Director/Owner/Manager) in your company?** | |
| Yes | | **☐Please go to question 7.** |
| No | | **☐Please go to question 8.** |

|  |  |
| --- | --- |
| **Q** | **Please specify their job title and level.** |
|  | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Does your company have a written sales/marketing plan?** | |
| Yes | | **☐Please go to question 9.** |
| No | | **☐Please go to question 11.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Does the plan cover sales development on a market by market basis?** | |
| Yes | | **☐** |
| No | | **☐** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Is exporting a specific element of this plan?** | |
| Yes | | **☐Please go to question 12.** |
| No | | **☐Please go to question 12.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Can you outline the main reasons why you do not have a written sales/marketing plan?** | |
| Do not have in-house expertise to develop one | | **☐** |
| Do not need one | | **☐** |
| Do not have the time to develop one | | **☐** |
| Cannot afford the cost of using an external source to develop one | | **☐** |
| Other | | **☐Please specify\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |

**Section B: Exporting Activity**

|  |  |  |
| --- | --- | --- |
| **Q** | **Have you conducted any business outside the UK within the last THREE years?** | **(Please tick any)** |
|  | Yes (Go to question 14) |  |
| No, but planning to start (Go to question 14) |  |
| No, and no plans to start (Go to question 13) |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **If you have not conducted any business outside the UK within the last THREE years and are not planning to, why not? (then go to question 19)** | **(Tick all that apply)** |
|  | Have no need, UK market is sufficient for our company |  |
| Product/service is not appropriate for sales outside the UK |  |
| Would require substantial resources and we have other priorities |  |
|  | Perceptions are that the barriers to overcome would be too difficult |  |
|  | Have just never thought about it |  |
|  | Other (specify) |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **Specifically, what motivated the decision to consider trading outside the UK?** | **(Tick all that apply)** |
|  | To achieve our growth goals |  |
| Higher profit margins outside UK |  |
| Utilise existing capacity |  |
|  | Reduce dependency on small number of markets |  |
|  | Opportunity to keep abreast of developments |  |
|  | International markets have always been relevant |  |
|  | Part of an international group set up to trade outside the UK |  |
|  | Other (specify) |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Q | Which of the following markets do you either currently export to, or would like to export to | Existing export destinations  (Tick all that apply) | Proposed export destinations within next 3 years  (Tick all that apply) |
|  | Republic of Ireland |  |  |
|  | Australia |  |  |
|  | Brazil |  |  |
|  | Russia |  |  |
|  | Canada |  |  |
|  | Chile |  |  |
|  | China |  |  |
|  | Colombia |  |  |
|  | Denmark |  |  |
|  | Poland |  |  |
|  | Czech Republic |  |  |
|  | Hong Kong |  |  |
|  | France |  |  |
|  | Germany |  |  |
|  | India |  |  |
|  | Kingdom of Saudi Arabia |  |  |
|  | Kurdistan |  |  |
|  | Libya |  |  |
|  | Malaysia |  |  |
|  | Mexico |  |  |
|  | New Zealand |  |  |
|  | Singapore |  |  |
|  | South Africa |  |  |
|  | South Korea |  |  |
|  | Sweden |  |  |
|  | Thailand |  |  |
|  | Turkey |  |  |
|  | United Arab Emirates |  |  |
|  | United States of America |  |  |
|  | Other |  |  |

|  |  |  |
| --- | --- | --- |
| Q | Specifically, what motivated the decision to consider trading in the international markets you have selected? | Tick all that apply |
|  | Competitors have already entered target market |  |
|  | Information from Government/Trade Agency |  |
|  | Advice from Supplier |  |
|  | Independent research conducted by firm |  |
|  | Research commissioned through Invest NI |  |
|  | Other (specify) |  |

|  |  |  |
| --- | --- | --- |
| Q | What are the barriers to entering your proposed export markets? | Tick all that apply |
|  | Obtaining information on an export market |  |
|  | Products unsuitable for export |  |
|  | No spare production capacity |  |
|  | Difficulty in establishing a dialogue with prospective customers or partners |  |
|  | Language/cultural differences |  |
|  | Preference by overseas customers to work with firms in their own country |  |
|  | Payment difficulties |  |
|  | Finance |  |
|  | Setting competitive prices |  |
|  | Currency/exchange rates |  |
|  | Import tariffs |  |
|  | Transport Costs |  |
|  | Staff not trained for this |  |
|  | Pressure on management time |  |
|  | Legislation/standards |  |
|  | Export documentation |  |
|  | Warranty or service support |  |
|  | Resource (staff) constraints |  |
|  | Other (specify) |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **What percentage of your turnover came from each of the following markets in your last financial year? Please specify where applicable.** | |
| **Market** | | **Turnover in last financial year %** |

|  |  |
| --- | --- |
| Republic of Ireland |  |
| Australia |  |
| Brazil |  |
| Russia |  |
| Canada |  |
| Chile |  |
| China |  |
| Colombia |  |
| Denmark |  |
| Poland |  |
| Czech Republic |  |
| Hong Kong |  |
| France |  |
| Germany |  |
| India |  |
| Kingdom of Saudi Arabia |  |
| Kurdistan |  |
| Libya |  |
| Malaysia |  |
| Mexico |  |
| New Zealand |  |
| Singapore |  |
| South Africa |  |
| South Korea |  |
| Sweden |  |
| Thailand |  |
| Turkey |  |
| United Arab Emirates |  |
| United States of America |  |
| Other |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **Has your level of exports increased, decreased or remained the same over the last three years?** | |
|  | Increased | **☐** |
| Decreased | **☐** |
| Remained the same | **☐** |
| Do not know | **☐** |

**Section C: Marketing Resources and Skills**

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you have professional marketing staff?**  **(I.e. staff that have the learned ability to identify market opportunities and to develop/ implement strategies to deliver on these opportunities).** | |
| Yes | | **☐Please go to question 21.** |
| No | | **☐Please go to question 25.** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Q** | **How many staff do you employ in marketing roles at the following levels? Please specify a number and % of time spent on exporting duties.** | | |
|  | | **Number** | **% of time spent on exporting duties** |
| **Entry Level – covers: Marketing Officer, Marketing Assistant, Researcher, etc.** | |  |  |
| **Middle Management covers Marketing Manager, Brand Manager etc.** | |  |  |
| **Senior Management/Director – Marketing Director; Brand Director; Sales/ Marketing Director; Export director** | |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Q** | **What is the highest qualification of your marketing staff? Please specify one for each applicable level.** | | |
| **Staff Level** | | **Highest Qualification** | |
| **Entry Level – covers: Marketing Officer, Marketing Assistant, Researcher, etc.** | | **Post Graduate level** | **☐** |
| **Marketing Degree** | **☐** |
| **Diploma/ Certificate level** | **☐** |
| **Other Marketing Professional Qualification- please detail** |  |
| **Middle Management covers Marketing Manager, Brand Manager etc.** | | **Post Graduate level** | **☐** |
| **Marketing Degree** | **☐** |
| **Diploma/ Certificate level** | **☐** |
| **Other Marketing Professional Qualification- please detail** |  |
| **Senior Management/Director – Marketing Director; Brand Director; Sales/ Marketing Director; Export director** | | **Post Graduate level** | **☐** |
| **Marketing Degree** | **☐** |
| **Diploma/ Certificate level** | **☐** |
| **Other Marketing Professional Qualification- please detail** |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Q** | **Assess the competence of your staff in the following areas (Scale of 0-5 with 5 being very competent and 0 being having no experience/ skills)** | | | | | | |
|  | **Area** |  | **Scale** | | | | |
|  |  | **0** | **1** | **2** | **3** | **4** | **5** |
|  | **Conduct Market Research to a Professional Standard** |  |  |  |  |  |  |
| **Commercially interpret statistics and prepare Financial Information** |  |  |  |  |  |  |
| **Develop a sales forecast for target financial markets** |  |  |  |  |  |  |
| **Develop Marketing Strategies in response to market opportunities identified through research** |  |  |  |  |  |  |
| **Prepare tactical plans for promotion, digital/on line actions for each export market** |  |  |  |  |  |  |
| **Deliver on the tactical plans developed** |  |  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **How have your employees gained their export marketing skills. Please tick all that apply.** | |
|  | They are recruited based on experience (not related to relevant qualifications) |  |
| They have relevant qualifications only |  |
| They have relevant experience and qualifications |  |
| They have relevant qualifications and receive specific training through the company |  |
| They have no relevant qualification but receive training through the company |  |
| Other | **Please specify:** |
|  | None of the above |  |

**Section D: Sales Resources and Skills**

**NOTE**

**Please only include staff that you have not covered in the marketing section. We realise that companies will have combined the sales/ marketing functions.**

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you have professional sales staff (i.e. staff that can carry out the key elements of a structured approach to executing sales (i.e. prospecting, preparation, relationship building, definition of needs, presentation of benefits, objection handling, closing and follow up)?** | |
| Yes | | **☐Please go to question 26.** |
| No | | **☐Please go to question 30.** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Q** | **How many staff do you employ in sales roles at the following levels? Please specify a number and % of time spent on exporting duties.** | | |
|  | | **Number** | **% of time spent on sales duties** |
| **Entry Level – Sales Executive, Sales Assistant, Sales/ Marketing Officer etc.** | |  |  |
| **Middle Management Level- Sales Manager, Sales/ Marketing Manager** | |  |  |
| **Senior Management/Director Level- Sales Director/ Sales/ Marketing Director** | |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Q** | **What is the highest qualification of your sales staff? Please specify one for each applicable level.** | | |
| **Staff Level** | | **Highest Qualification** | |
| **Entry Level – Sales Executive, Sales Assistant, Sales/ Marketing Officer etc.** | | **Post Graduate level** | **☐** |
| **Sales Degree** | **☐** |
| **Diploma/ Certificate level** | **☐** |
| **Other Sales Professional Qualification- please detail** |  |
| **Entry Level – Sales Executive, Sales Assistant, Sales/ Marketing Officer etc.** | | **Post Graduate level** | **☐** |
| **Sales Degree** | **☐** |
| **Diploma/ Certificate level** | **☐** |
| **Other Sales Professional Qualification- please detail** |  |
| **Senior Management/Director Level- Sales Director/ Sales/ Marketing Director** | | **Post Graduate level** | **☐** |
| **Sales Degree** | **☐** |
| **Diploma/ Certificate level** | **☐** |
| **Other Sales Professional Qualification- please detail** |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Q** | **Assess the competence of your staff in the following areas (Scale of 0-5 with 5 being very competent and 0 being having no experience/ skills)** | | | | | | |
|  | **Area** |  | **Scale** | | | | |
|  |  | **0** | **1** | **2** | **3** | **4** | **5** |
|  | **Able to develop a sales strategy for each market** |  |  |  |  |  |  |
| **Able to identify sales prospects in markets in line with targets set in plan** |  |  |  |  |  |  |
| **Able to develop relationships with prospective clients** |  |  |  |  |  |  |
| **Able to sell your company’s services / products** |  |  |  |  |  |  |
| **Able to close the sale** |  |  |  |  |  |  |
| **Able to provide follow up customer service** |  |  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **How have your employees gained these professional sales skills? Please tick all that apply.** | |
|  | They are recruited based on experience (not related to relevant qualifications) |  |
| They have relevant qualifications only |  |
| They have relevant experience and qualifications |  |
| They have relevant qualifications and receive specific training through the company |  |
| They have no relevant qualification but receive training through the company |  |
| Other | **Please specify:** |
| None of the above |  |

**Section E: Additional Information**

|  |  |  |
| --- | --- | --- |
| **Q** | **Have you encountered any difficulties in recruiting sales/ marketing staff?** | |
| Yes | | **☐Please go to question 31.** |
| No | | **☐Please go to question 32.** |

|  |  |
| --- | --- |
| **Q** | **What were these difficulties? Please list.** |
|  | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you have a current need for additional sales/ marketing staff?** | |
| Yes | | **☐Go to question 33.** |
| No | | **☐Go to question 35.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **What level of staff do you require?** | |
| Graduate (entry level) | | **☐**  **Please specify a number\_\_\_\_\_\_\_** |
| Experienced | | **☐**  **Please specify a number\_\_\_\_\_\_\_** |
| Other | | **☐**  **Please specify a level number\_\_\_\_\_\_\_** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you think your need for staff will increase, decrease or remain the same in the next 2-3 years?** | |
| Increase | | **☐**  **By how many?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| Decrease | | **☐** |
| Remain the same | | **☐** |
| Do not know | | **☐** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you train / develop your existing sales/ marketing staff?** | |
| Yes | | **☐Please go to question 36.** |
| No | | **☐Please go to question 39.** |

|  |  |
| --- | --- |
| **Q** | **How many days approx. training per annum per person?** |
|  | |

|  |  |
| --- | --- |
| **Q** | **What is the approximate cost of training per person per annum?** |
| £ | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Who has delivered this training?** | |
| FE college/s | | **☐** |
| HE college/s | | **☐** |
| Private Provider | | **☐** |
| Other | | **☐Please specify:** |

**Section F: International Business Communication**

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you require staff that are proficient in languages for exporting?** | |
| Yes | | **☐Please go to question 41.** |
| No | | **☐Please go to question 40.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Why is this? Tick all that apply and go to question 44.** | |
| We use external translators/interpreters | | **☐** |
| The countries we export to facilitate English speaking companies | | **☐** |
| Other | | **☐Please specify:** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Q** | **Tick all languages that apply and specify:**   * **The current number of staff in your existing workforce that are proficient in each language;** * **The number you need to meet existing requirements; and** * **The number you are likely to need in the future to meet requirements.** | | | |
| **Language** | | **Current Number in Workforce** | **Number needed to meet existing requirements** | **Number likely to be needed to meet future requirements** |
| **☐**Spanish | |  |  |  |
| **☐**French | |  |  |  |
| **☐**Russian | |  |  |  |
| **☐**German | |  |  |  |
| **☐**Brazilian Portugese | |  |  |  |
| **☐**Mandarin | |  |  |  |
| **☐**Cantonese | |  |  |  |
| **☐**Other | |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **Did you train your staff in these languages?** | |
| Yes | | **☐Please go to question 43.** |
| No, they were recruited already trained | | **☐Please go to question 44.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Who has delivered this training?** | |
| FE college/s | | **☐Please specify course/s:** |
| HE college/s | | **☐Please specify course/s:** |
| Private Provider | | **☐Please specify course/s:** |
| Other | | **☐Please specify:** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do your export staff have International cultural awareness skills related to business (i.e. knowledge of appropriate business etiquette and protocol for the market)?** | |
| Yes | | **☐Please go to question 45.** |
| No | | **☐Please go to question 54.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **How have your employees gained these cultural awareness skills Please tick all that apply.** | |
|  | They are recruited based on experience (not related to relevant qualifications) |  |
| They have relevant qualifications only |  |
| They have relevant experience and qualifications |  |
| They have relevant qualifications and receive specific training through the company |  |
| They have no relevant qualification but receive training through the company |  |
| Other | **Please specify:** |
|  | None of the above |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **Have you encountered any difficulties in recruiting staff with the appropriate cultural awareness skills?** | |
| Yes | | **☐Please go to question 47.** |
| No | | **☐Please go to question 48.** |

|  |  |
| --- | --- |
| **Q** | **What were these difficulties? Please list.** |
|  | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you train and develop your existing staff in cultural awareness skills related to business?** | |
| Yes | | **☐Please go to question 49.** |
| No | | **☐Please go to question 52.** |

|  |  |
| --- | --- |
| **Q** | **How many days training per annum per person?** |
|  | |

|  |  |
| --- | --- |
| **Q** | **What is the approximate cost of training per person per annum?** |
| £ | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Who has delivered this training?** | |
| FE college/s | | **☐Please specify course/s:** |
| HE college/s | | **☐Please specify course/s:** |
| Private Provider | | **☐Please specify course/s:** |
| Other | | **☐Please specify:** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you need more staff with cultural awareness skills related to business?** | |
| Yes | | **☐Go to question 53.** |
| No | | **☐Go to question 54.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **What level of staff do you require?** | |
| Graduate (entry level) | | **☐**  **Please specify a number\_\_\_\_\_\_\_\_\_** |
| Experienced | | **☐**  **Please specify a number\_\_\_\_\_\_\_\_\_** |
| Other | | **☐**  **Please specify a level and number\_\_\_\_\_\_\_\_\_** |

**Section G: Concluding Comments**

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you have any additional comments?** | |
| Yes | | **☐Please go to question 55.** |
| No | | **☐Survey complete.** |

|  |  |
| --- | --- |
| **Q** | **Additional comments:** |
|  | |

**Thank you for taking the time to complete this survey.**

**Companies Preparing to Export Survey**

**Background to the research**

Currently in Northern Ireland, various key policies such as the NI Economic Strategy (2012), Success Through Skills – Transforming Futures, the Skills Strategy for Northern Ireland and the Programme for Government emphasise that in order to strengthen Northern Ireland’s competitiveness, there needs to be a focus on export led economic growth. One of the key elements of achieving this export led growth is for Northern Ireland companies to have in place the right skills mix to sell their products and services. The skills required span the continuum from those needed to sell professionally in local markets, to those required for business to market and sell their products and services internationally. The Economic Strategy clearly articulates what is required in this regard:

“We must also work to develop sales and marketing professionals, alongside foreign language skills, if NI companies are to compete successfully in global markets.”

Thus the purpose of this research study is to assess the supply of these skills at present, forecast the future requirement for these skills, highlight gaps in existing and predicted skills supply and provision, and make recommendations to address any issues identified in the course of this review.

(Source: Invest NI, DETI and DEL Terms of Reference October 2012).

**Who should complete this questionnaire?**

Companies preparing to export, particularly to countries outside of the UK and ROI, should complete this questionnaire. (Note: there is a questionnaire for companies already exporting, a questionnaire for those preparing to export and those who don’t export).

**Timescales**

The deadline for completion is **24th January 2013.**

**Important notes on completing the questionnaire**

* The questionnaire will take approximately 15 minutes to complete. For some respondents, the time required may be slightly more, for others it may be slightly less. We appreciate the investment of your time in this important research to support the sector greatly.
* If you require any assistance or have any queries please do not hesitate to contact Karyn Millar at RSM McClure Watters on **02890 23 43 43** or at [karyn.millar@rsmmcw.com](mailto:karyn.millar@rsmmcw.com)

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**Section A: General Information and Background**

|  |  |  |
| --- | --- | --- |
| **Q** | **Individual / Organisation Details** | |
|  | Business Name |  |
| Individual Name |  |
| Job Title / Role |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Q** | **How many employees are there in your company at present?** *Tick one* | | | | |
|  | <10 |  |  | 250 – 499 |  |
| 10 – 49 |  |  | 500 – 999 |  |
| 50 – 249 |  |  | 1000 + | ***- If 1000+, Please specify****:* |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Q** | **What sector is your company in?** *Tick one* | | | |
|  | Agriculture, Forestry and Fishing |  | Real Estate Activities |  |
| Mining and Quarrying |  | Professional, Scientific and Technical Activities |  |
| Manufacturing |  | Administrative and Support Service Activities |  |
| Electricity, Gas, Steam and Air Conditioning |  | Public Administration and Defence; Compulsory Social Security |  |
| Water Supply: Sewerage, Waste Management and Remediation Activities |  | Education |  |
| Construction |  | Human Health and Social Work Activities |  |
| Wholesale and Retail Trade: Repair of Motor Vehicles and Motorcycles |  | Arts, Entertainment and Recreation |  |
| Transportation and Storage |  | Other Service Activities |  |
| Accommodation and Food Service Activities |  | Activities of Households as Employers; Undifferentiated Goods- and Services-Producing Activities of Households for own use |  |
| Information and Communication |  | Activities of Extraterritorial Organisations and Bodies |  |
| Financial and Insurance Activities |  | Other - **Please specify**: |  |

| **Q** | **Which District Council Area is your company based in?** *Please Enter Post Code*  *(even if your company operates across more than one Council area, it is the location of your company headquarters that we would like to know).* |
| --- | --- |
|  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Q** | **How long has your company been established?** *Tick one* | | | | |
|  | Company not yet formed |  |  | 5 years |  |
| 1 year |  |  | 6 to 10 years |  |
| 2 years |  |  | 11 to 15 years |  |
| 3 years |  |  | 16 to 20 years |  |
| 4 years |  |  | More than 20  years\* | **- \*Please specify:** |

|  |  |
| --- | --- |
| **Q** | **Who has responsibility for exporting at a senior level in your company? Please state their job title.** |
|  | |

|  |  |
| --- | --- |
| **Q** | **Who has responsibility at a senior level for sales/ marketing in your company? Please state their job title.** |
|  | |

|  |  |
| --- | --- |
| **Q** | **Who has responsibility at a strategic level for sales/ marketing/export in your company? Please state their job title.** |
|  | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Does your company have a current structured sales/marketing/export plan?** | |
| Yes | | **☐Please go to question 10.** |
| No | | **☐Please go to question 11.** |

|  |  |
| --- | --- |
| **Q** | **What markets does this cover? List all and go to question 12:** |
|  | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Can you outline the main reasons why you do not have a structured sales/marketing/export plan?** | |
| We are currently forming one as part of our preparation to export | | **☐** |
| Do not have in-house expertise to develop one | | **☐** |
| Do not need one | | **☐** |
| Do not have the time to develop one | | **☐** |
| Cannot afford the cost of using an external source to develop one | | **☐** |
| Other | | **☐Please specify\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |

**Section B: Future Exporting Activity**

|  |  |  |  |
| --- | --- | --- | --- |
| **Q** | **Which market/s do you plan to export to?** | | |
|  | Northern Ireland |  |  |
| Great Britain |  |  |
| Republic of Ireland |  |  |
| Europe |  |  |
| Latin America |  |  |
| Brazil |  |  |
| Russia |  |  |
| India |  |  |
| China |  |  |
| Middle East |  |  |
| Other | **Please specify:** |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **What is the rationale for choosing these future market(s) or regions? (Please state main reasons)** | |
|  | It is an emerging market | **☐** |
|  | My current workforce has the existing skills needed for this market | **☐** |
|  | I have recently made new contacts through networking | **☐** |
|  | Their market fits well with the company’s plans for growth | **☐** |
|  | Other | **☐Please specify:** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Does your company have any difficulty getting access to effective sales & export marketing resources?** | |
| Yes | | **☐Please Elaborate:** |
| No | | **☐** |
| Do not know | | **☐** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you foresee any barriers to beginning/expanding exporting activities?** | |
| Yes | | **☐Please go to question 16.** |
| No | | **☐Please go to question 17.** |
| Do not know | | **☐Please go to question 17.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **What are these barriers?** | |
| Lack of finance/poor cash flow | | **☐** |
| Lack of qualified staff | | **☐** |
| Other | | **☐Please specify\_\_\_\_\_\_\_** |

**Section C: Professional Sales**

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you have professional sales staff?** | |
| Yes | | **☐Please go to question 18.** |
| No | | **☐Please go to question 29.** |

|  |  |
| --- | --- |
| **Q** | **How many staff are in a professional sales role? Please specify a number.** |
|  | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Please detail the ages of these members of staff:** | |
| Staff member 1 | |  |
| Staff member 2 | |  |
| Staff member 3 | |  |
| Staff member 4 | |  |
| Staff member 5 | |  |
| Staff member 6 | |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Q** | **What qualifications do each of the sales professionals (e.g. Directors, Managers, Reps. Etc.) in your company have? Please specify.** | | |
|  | | **Job Title** | **Qualifications (please detail if known)** |
| Staff member 1 | |  |  |
| Staff member 2 | |  |  |
| Staff member 3 | |  |  |
| Staff member 4 | |  |  |
| Staff member 5 | |  |  |
| Staff member 6 | |  |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **What are the salaries and benefits of the different sales roles (e.g. Sales Director; Sales Manager; Sales Rep etc.?** | |
| **Job title 1:** | | |
| **Salary** | | £ |
| **Bonus?** | | £ |
| **Other benefits?** | |  |
| **Job title 2:** | | |
| **Salary** | | £ |
| **Bonus?** | | £ |
| **Other benefits?** | |  |
| **Job title 3:** | | |
| **Salary** | | £ |
| **Bonus?** | | £ |
| **Other benefits?** | |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Q** | **Do you your current professional sales staff that have the following skills that can aid exporting:** | | | | |
| **Can develop an effective sales strategy** | | **☐Yes: All the sales staff have this skill.** | **☐Most of the sales staff have this skill.**  **Can you specify the percentage that DOES?**  **­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_** | **☐ No: None of the sales staff have this skill.** | |
| **Can implement an effective sales strategy through**   * **prospecting;** * **preparation;** * **relationship building;** * **defining needs;** * **presenting benefits;** * **objection handling; and** * **closing and follow up.** | | **☐Yes: All the sales staff have these skills.** | **☐Most of the sales staff have these skills.**  **Can you specify the percentage that DOES?**  **­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_** | | **☐ No: None of the sales staff have these skills.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **How have your employees gained professional sales skills (i.e. skills to allow them to implement and develop an effective sales strategy that will aid exporting). Please tick all that apply.** | |
|  | They are recruited based on experience (not related to relevant qualifications) |  |
| They have relevant qualifications only |  |
| They have relevant experience and qualifications |  |
| They have relevant qualifications and receive specific training through the company |  |
| They have no relevant qualification but receive training through the company |  |
| Other | **Please specify:** |
|  | None of the above |  |
|  | Non applicable |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you train and develop your existing staff to develop their strategic export marketing skills?** | |
| Yes | | **☐Please go to question 25.** |
| No | | **☐Please go to question 29.** |

|  |  |
| --- | --- |
| **Q** | **How many days training per annum per person?** |
|  | |

|  |  |
| --- | --- |
| **Q** | **What is the approximate cost of training per person per annum?** |
| £ | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Who has delivered this training?** | |
| FE college/s | | **☐Please specify course/s:** |
| HE college/s | | **☐Please specify course/s:** |
| Private Provider | | **☐Please specify course/s:** |
| Other | | **☐Please specify:** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Q** | **What is your preferred method of delivery?** | | | |
| Off the job courses | | | **☐** | |
| On the job development | | | **☐** | |
| Conferences | | | **☐** | |
| Seminars | | | **☐** | |
| E-learning | | | **☐** | |
| One to one coaching | | | **☐** | |
| Other | | | **☐Please specify:** | |
| **Q** | **Will you be recruiting professional sales staff with skills that can aid exporting?** | | |
| Yes, there is a need for these professionals | | **☐Please go to question 30.** | |
| No, we do not have a need for these professionals | | **☐Please go to question 31.** | |
| Do not know | | **☐Please go to question 31.** | |

|  |  |
| --- | --- |
| **Q** | **How will you ensure that they have the appropriate skills necessary for exporting? Please list.** |
|  | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you think your need, or lack of, for professional sales staff will increase, decrease or remain the same in the next five years?** | |
| Increase | | **☐** |
| Decrease | | **☐** |
| Remain the same | | **☐** |
| Do not know | | **☐** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you think the existing supply of skills within Northern Ireland (i.e. individuals with relevant skills) is sufficient to meet your needs?** | |
| Yes | | **☐** |
| No | | **☐** |
| Not applicable | | **☐** |
| Do not know | | **☐** |

|  |  |  |
| --- | --- | --- |
| **Q** | **How do you rate existing sales & marketing training provision in Northern Ireland?** | |
| Good | | **☐** |
| Intermediate | | **☐** |
| Poor | | **☐** |
| Do not know | | **☐** |

**Section D: Strategic Export Marketing**

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you currently have marketing staff that are professionals in strategic exporting?** | |
| Yes | | **☐Please go to question 35.** |
| No | | **☐Please go to question 46.** |

|  |  |
| --- | --- |
| **Q** | **How many staff are in this role? Please specify a number.** |
|  | |

|  |  |  |
| --- | --- | --- |
| **Q** | **What are the salary/ benefit packages for each of your key export marketing roles? E.g. Director; Manager; Officer etc.?** | |
| **Job title 1:** | | |
| **Salary** | | £ |
| **Bonus?** | | £ |
| **Other benefits?** | |  |
| **Job title 2:** | | |
| **Salary** | | £ |
| **Bonus?** | | £ |
| **Other benefits?** | |  |
| **Job title 3:** | | |
| **Salary** | | £ |
| **Bonus?** | | £ |
| **Other benefits** | |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Q** | **Do you have strategic export marketing staff that have the following relevant skills:** | | | |
| **Identify market opportunities** | | **☐Yes: all strategic export marketing staff have this skill.** | **☐Most of the strategic export marketing staff have this skill.**  **Please state the percentage that DOES:**  **­­­­­­\_\_\_\_\_\_\_\_\_\_\_** | **☐ No: none of the export marketing staff have this skill.** |
| **Implement strategies in response to identified opportunities with emphasis on export markets.** | | **☐Yes: all strategic export marketing staff have this skill.** | **☐Most of the strategic export marketing staff have this skill.**  **Please state the percentage that DOES:**  **­­­­­­\_\_\_\_\_\_\_\_\_\_\_** | **☐ No: none of the export marketing staff have this skill.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **How have they gained these skills? Please tick all that apply.** | |
|  | They are recruited based on experience (not related to relevant qualifications) |  |
| They have relevant qualifications only |  |
| They have relevant experience and qualifications |  |
| They have relevant qualifications and receive specific training through the company |  |
| They have no relevant qualification but receive training through the company |  |
| Other | **Please specify:** |
|  | None of the above |  |
|  | Not applicable |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you train and develop your existing staff to develop their existing strategic export marketing skills?** | |
| Yes | | **☐Please go to question 42.** |
| No | | **☐Please go to question 46.** |

|  |  |
| --- | --- |
| **Q** | **How many days training per annum per person?** |
|  | |

|  |  |
| --- | --- |
| **Q** | **What is the approximate cost of training per person per annum?** |
| £ | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Who has delivered this training?** | |
| FE college/s | | **☐Please specify course/s:** |
| HE college/s | | **☐Please specify course/s:** |
| Private Provider | | **☐Please specify course/s:** |
| Other | | **☐Please specify:** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Q** | **What is your preferred method of delivery?** | | | |
| Off the job courses | | | **☐** | |
| On the job development | | | **☐** | |
| Conferences | | | **☐** | |
| Seminars | | | **☐** | |
| E-learning | | | **☐** | |
| One to one coaching | | | **☐** | |
| Other | | | **☐Please specify:** | |
| **Q** | **Will you be recruiting any strategic export marketing staff?** | | |
| Yes, there is a need for these professionals | | **☐Please go to question 47.** | |
| No, we do not have a need for these professionals | | **☐Please go to question 48.** | |
| Do not know | | **☐Please go to question 48.** | |

|  |  |
| --- | --- |
| **Q** | **How will you ensure that they have the appropriate skills necessary for exporting? Please list.** |
|  | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you think your need, or lack of, for strategic export marketing staff will increase, decrease or remain the same in the next five years?** | |
| Increase | | **☐** |
| Decrease | | **☐** |
| Remain the same | | **☐** |
| Do not know | | **☐** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you think the existing supply of skills (i.e. people with relevant skills) is sufficient to meet your needs?** | |
| Yes | | **☐** |
| No | | **☐** |
| Do not know | | **☐** |
| Not applicable | | **☐** |

**Section E: International Business Communication**

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you currently require individuals that are proficient in languages?** | |
| Yes | | **☐Please go to question 53.** |
| No | | **☐Please go to question 51.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Will you require individuals that are proficient in languages once you begin exporting?** | |
| Yes | | **☐Please go to question 56.** |
| No | | **☐Please go to question 52.** |
| Do not know | | **☐Please go to question 56.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Why is this? Tick all that apply and go to question 56.** | |
| We use/will use external translators/interpreters | | **☐** |
| The countries we will be exporting to facilitate English speaking companies | | **☐** |
| Other | | **☐Please specify:** |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Q** | **Tick all languages that apply and specify:**   * **The current number of staff in your existing workforce that are proficient in each language; and** * **The number you need to meet existing requirements.** | | | | | |
| **Language** | | **Current Number in Workforce** | | **Number needed to meet existing requirements** | |
| **☐**Spanish | |  | |  | |
| **☐**French | |  | |  | |
| **☐**Russian | |  | |  | |
| **☐**German | |  | |  | |
| **☐**Portugese | |  | |  | |
| **☐**Brazilian | |  | |  | |
| **☐**Mandarin | |  | |  | |
| **☐**Cantonese | |  | |  | |
| **☐**Hokkien | |  | |  | |
| **☐**Other | |  | |  | |
| **Q** | **Did you train your staff in these languages?** | | | |
| Yes | | | **☐Please go to question 55.** | |
| No, they were recruited already trained | | | **☐Please go to question 56.** | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Who has delivered this training?** | |
| FE college/s | | **☐Please specify course/s:** |
| HE college/s | | **☐Please specify course/s:** |
| Private Provider | | **☐Please specify course/s:** |
| Other | | **☐Please specify:** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do your staff have International business communication skills such as cultural awareness skills related to business (i.e. understanding cross-cultural differences, recognising the potential impact of these differences on business development, and knowledge of appropriate business etiquette and protocol)?** | |
| Yes | | **☐Please go to question 57.** |
| No | | **☐Please go to question 65.** |
| Do not know | | **☐Please go to question 65.** |

|  |  |  |
| --- | --- | --- |
| **Q** | **How have your employees gained these cultural awareness skills Please tick all that apply.** | |
|  | They are recruited based on experience (not related to relevant qualifications) |  |
| They have relevant qualifications only |  |
| They have relevant experience and qualifications |  |
| They have relevant qualifications and receive specific training through the company |  |
| They have no relevant qualification but receive training through the company |  |
| Other | **Please specify:** |
|  | None of the above |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **Have you encountered, or foresee any barriers to gaining staff with the appropriate cultural awareness skills?** | |
| Yes | | **☐Please go to question 59.** |
| No | | **☐Please go to question 60.** |

|  |  |
| --- | --- |
| **Q** | **What were these barriers? Please list.** |
|  | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you train and develop your existing staff to develop their cultural awareness skills related to business?** | |
| Yes | | **☐Please go to question 61.** |
| No | | **☐Please go to question 65.** |

|  |  |
| --- | --- |
| **Q** | **How many days training per annum per person?** |
|  | |

|  |  |
| --- | --- |
| **Q** | **What is the approximate cost of training per person per annum?** |
| £ | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Who has delivered this training?** | |
| FE college/s | | **☐Please specify course/s:** |
| HE college/s | | **☐Please specify course/s:** |
| Private Provider | | **☐Please specify course/s:** |
| Other | | **☐Please specify:** |

|  |  |  |
| --- | --- | --- |
| **Q** | **What is your preferred method of delivery?** | |
| Off the job courses | | **☐** |
| On the job development | | **☐** |
| Conferences | | **☐** |
| Seminars | | **☐** |
| E-learning | | **☐** |
| One to one coaching | | **☐** |
| Other | | **☐Please specify:** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you have a current need for staff/more staff with cultural awareness skills related to business?** | |
| Yes | | **☐** |
| No | | **☐** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Do you think your need for staff with cultural awareness will increase, decrease or remain the same in the next five years?** | |
| Increase | | **☐** |
| Decrease | | **☐** |
| Remain the same | | **☐** |
| Do not know | | **☐** |

**Section F: Concluding Comments**

|  |  |
| --- | --- |
| **Q** | **Do you have any additional comments?** |
|  | |

**Thank you for taking the time to complete this survey.**

**Companies currently not Exporting Survey**

**Background to the research**

Currently in Northern Ireland, various key policies such as the NI Economic Strategy (2012), Success Through Skills – Transforming Futures, the Skills Strategy for Northern Ireland and the Programme for Government emphasise that in order to strengthen Northern Ireland’s competitiveness, there needs to be a focus on export led economic growth. One of the key elements of achieving this export led growth is for Northern Ireland companies to have in place the right skills mix to sell their products and services. The skills required span the continuum from those needed to sell professionally in local markets, to those required for business to market and sell their products and services internationally. The Economic Strategy clearly articulates what is required in this regard:

“We must also work to develop sales and marketing professionals, alongside foreign language skills, if NI companies are to compete successfully in global markets.”

Thus the purpose of this research study is to assess the supply of these skills at present, forecast the future requirement for these skills, highlight gaps in existing and predicted skills supply and provision, and make recommendations to address any issues identified in the course of this review.

(Source: Invest NI, DETI and DEL Terms of Reference October 2012).

**Who should complete this questionnaire?**

Companies currently not exporting, and not preparing to export, should complete this questionnaire. (Note: there is a questionnaire for companies already exporting, a questionnaire for those preparing to export and those who don’t export).

**Timescales**

The deadline for completion is **24th January 2013.**

**Important notes on completing the questionnaire**

* The questionnaire will take approximately 10 minutes to complete. For some respondents, the time required may be slightly more, for others it may be slightly less. We appreciate the investment of your time in this important research to support the sector greatly.
* If you require any assistance or have any queries please do not hesitate to contact Karyn Millar at RSM McClure Watters on **02890 23 43 43** or at [karyn.millar@rsmmcw.com](mailto:karyn.millar@rsmmcw.com)

**Confidentiality**

All responses will be treated in confidence by RSM McClure Watters.

**Section A: General Information and Background**

|  |  |  |
| --- | --- | --- |
| **Q** | **Individual / Organisation Details** | |
|  | Business Name |  |
| Individual Name |  |
| Job Title / Role |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Q** | **How many employees are there in your company at present?** *Tick one* | | | | |
|  | <10 |  |  | 250 – 499 |  |
| 10 – 49 |  |  | 500 – 999 |  |
| 50 – 249 |  |  | 1000 + | ***- If 1000+, Please specify****:* |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Q** | **What sector is your company in?** *Tick one* | | | |
|  | Agriculture, Forestry and Fishing |  | Real Estate Activities |  |
| Mining and Quarrying |  | Professional, Scientific and Technical Activities |  |
| Manufacturing |  | Administrative and Support Service Activities |  |
| Electricity, Gas, Steam and Air Conditioning |  | Public Administration and Defence; Compulsory Social Security |  |
| Water Supply: Sewerage, Waste Management and Remediation Activities |  | Education |  |
| Construction |  | Human Health and Social Work Activities |  |
| Wholesale and Retail Trade: Repair of Motor Vehicles and Motorcycles |  | Arts, Entertainment and Recreation |  |
| Transportation and Storage |  | Other Service Activities |  |
| Accommodation and Food Service Activities |  | Activities of Households as Employers; Undifferentiated Goods- and Services-Producing Activities of Households for own use |  |
| Information and Communication |  | Activities of Extraterritorial Organisations and Bodies |  |
| Financial and Insurance Activities |  | Other - **Please specify**: |  |

| **Q** | **Where are you located?** *Please detail your head office Post Code.* |
| --- | --- |
|  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Q** | **How long has your company been established?** *Tick one* | | | | |
|  | 1 to 5 years |  |  | 6 to 10 years |  |
| 11 to 15 years |  |  | 16 to 20 years |  |
| 21 to 25 years |  |  | More than 25  years\* | **- \*Please specify:** |

|  |  |  |
| --- | --- | --- |
| **Q** | **Does your company have a written sales/marketing plan?** | |
| Yes | | **☐Please go to question 7.** |
| No | | **☐Please go to question 8.** |

|  |  |
| --- | --- |
| **Q** | **What markets does this cover? List all and go to question 9:** |
|  | |

|  |  |  |
| --- | --- | --- |
| **Q** | **Can you outline the main reasons why you do not have a written sales/marketing plan?** | |
| Do not have in-house expertise to develop one | | **☐** |
| Do not need one | | **☐** |
| Do not have the time to develop one | | **☐** |
| Cannot afford the cost of using an external source to develop one | | **☐** |
| Other | | **☐Please specify\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |

**Section B: Exporting**

|  |  |  |
| --- | --- | --- |
| **Q** | **Have you, or would you, consider exporting?** | |
| Yes | | **☐Please go to question 10.** |
| No | | **☐Please go to question 11.** |
| It depends | | **☐Please go to question 11.** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Q** | **Which market/s would you consider exporting to?** | | |
|  | Great Britain |  |  |
| Republic of Ireland |  |  |
| Europe | **Please specify:** |  |
| Latin America |  |  |
| Brazil |  |  |
| Russia |  |  |
| India |  |  |
| China |  |  |
| Middle East |  |  |
| Other | **Please specify:** |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Q** | **What barriers prevent you from exporting at present (or from considering exporting)?** | |
| Lack in supply of individuals with relevant skills | | **☐** |
| Cost of upskilling workforce | | **☐** |
| Cost of recruiting staff with relevant skills | | **☐** |
| Other | | **☐Please specify:** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Q** | **What would help you overcome these barriers? Please outline.** | | |
|  | | | |
| **Q** | **Are you aware of the following supports?** | | | |
|  |  | **Yes** | **No** | |
| Challenge (strategic planning) | **☐** | **☐** | |
| FP7 Support (European funding (FP7)) | **☐** | **☐** | |
| Elevate (sales development) | **☐** | **☐** | |
| Acumen (sales & marketing) | **☐** | **☐** | |
| Fusion (collaborative innovation) | **☐** | **☐** | |
| Innova (company to company R&D) | **☐** | **☐** | |
| Go2Tender (tendering and procurement) | **☐** | **☐** | |
| Equity Network | **☐** | **☐** | |
| All-island Innovation Programme | **☐** | **☐** | |
| First Stop Shop & Trade Accelerator Vouchers | **☐** | **☐** | |
| Seedcorn (business competition) | **☐** | **☐** | |
| Business Information Service | **☐** | **☐** | |
| Consultancy Services | **☐** | **☐** | |
| Export Workshops | **☐** | **☐** | |
| Trade Missions | **☐** | **☐** | |
| Trade Exhibitions | **☐** | **☐** | |
| In-Market Support | **☐** | **☐** | |
| Trade Advisory Service; | **☐** | **☐** | |
| Northern Ireland Trade Development Centres | **☐** | **☐** | |
| Going Dutch | **☐** | **☐** | |

**Section C: Staff and Skills**

|  |  |  |
| --- | --- | --- |
| **Q** | **You previously indicated the number of employees in the company. How many of these employees already have the relevant skills needed for international exporting? Please specify where applicable.** | |
|  | **Professional sales skills** | |
| Learned ability to take a structured approach to developing and implementing an effective sales strategy within an organisation. Capacity to deploy the key elements of a structured approach to executing sales (i.e. prospecting, preparation, relationship building, definition of needs, presentation of benefits, objection handling, closing and follow up). | **Please specify:** |
| **Strategic export marketing skills** | |
| Learned ability which enables the effective identification of marketing opportunities and the development and implementation of strategies in response to these opportunities, with a particular emphasis on export markets. | **Please specify:** |
| **International (or intercultural) Business Communication skills** – | |
| 1. Learned ability to use foreign languages in a business context. | **Please specify:** |
| 1. Competence in cultural awareness of different traditions. | **Please specify:** |
|  | Other | **Please specify:** |

**Section D: Concluding Comments**

|  |  |
| --- | --- |
| **Q** | **Do you have any additional comments?** |
|  | |

**Thank you for taking the time to complete this survey.**

Appendix 2: Preparing to Export

Company Profiles

The majority (43%) of companies who responded to the preparing to export survey have been established for over 25 years. Furthermore, the majority (40%) of respondent firms were medium sized companies, with between 10 – 49 employees. The following table outlines the company responses by size of firm.

Table 1: Size of Company (n=30)

|  |  |  |
| --- | --- | --- |
| Number of Employees | Total (%) | Total (n) |
| <10 | 27% | 8 |
| 10-49 | 40% | 12 |
| 50-249 | 30% | 9 |
| 250-499 | 3% | 1 |
| 500-999 | 0% | 0 |
| 1000+ | 0% | 0 |
| Total | 100% | 30 |

The following table outlines the range of industries, within which the respondent companies currently operate within. The majority (43%) of company responses were from companies within the manufacturing sector.

Table 2: Sectors (n=30)

| Sector | Total (%) | Total (n) |
| --- | --- | --- |
| Information and Communication | 4 | 13.3% |
| Construction | 4 | 13.3% |
| Water Supply, Sewerage, Waste Management and Remediation | 2 | 6.7% |
| Wholesale and Retail Trade | 2 | 6.7% |
| Professional, Scientific, Technical | 1 | 3.3% |
| Agriculture, Forestry and Fishing | 1 | 3.3% |
| Human Health and Social Work | 1 | 3.3% |
| Other, including;   * Recycling | 2 | 6.7% |
| Manufacturing | | |
| Food, Drink and Tobacco | 5 | 16.7% |
| Machinery and Equipment | 2 | 6.7% |
| Computing, Electronic and Optical | 1 | 3.3% |
| Rubber and Plastics | 1 | 3.3% |
| Other, including;   * Musical Instruments; * Metal Fabrication; * Packaging | 4 | 13.3% |

Table 5: Sectors by size of company (n=30)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Size of Company | | | | | |
| Sector | <10 | 10-49 | 50-249 | 250-499 | Total (n) | Total (%) |
| Agriculture, Forestry and Fishing | - | 1 | - | - | 1 | 3.3% |
| Water Supply: Sewerage, Waste Management and Remediation Activities | - | 2 | - | - | 2 | 6.7% |
| Construction | 1 | - | 3 | - | 4 | 13.3% |
| Information and Communication | 2 | 1 | 1 | - | 4 | 13.3% |
| Wholesale and Retail Trade | - | 1 | - | 1 | 2 | 6.7% |
| Professional, Scientific and Technical Activities | 1 | - | - | - | 1 | 3.3% |
| Human Health and Social Work Activities | - | 1 | - | - | 1 | 3.3% |
| Other Service Activities | 1 | 1 | - | - | 2 | 6.7% |
| Manufacturing – food, drink and tobacco | - | 3 | 2 | - | 5 | 16.7% |
| Manufacturing – Rubber and Plastics | - | - | 1 | - | 1 | 3.3% |
| Manufacturing – computing, electronic and optical | - | - | 1 | - | 1 | 3.3% |
| Manufacturing – machinery and equipment | 1 | 1 | - | - | 2 | 6.7% |
| Other manufacturing | 2 | 1 | 1 | - | 4 | 13.3% |
| Total (n) | 8 | 12 | 9 | 1 | 30 (100%) | |
| Total (%) | 27% | 40% | 30% | 3% |

General Sales, Marketing and Exporting Background Information

Within the sample of companies, 90% (n=27) had someone within the firm at a senior level who was responsible for exporting. Most of the senior people responsible were directors or owners, with others specifying sales and marketing or business development directors also.

It should be noted that 57% (n=17) of the respondents indicated that their respective companies did not currently have a sales or marketing plan. When asked why the company did not have a sales or marketing plan in place, the most popular response (71%, n=12) was that the company was in the process of developing a plan.

Table 6: Reasons for not having a sales and marketing plan by size of company (n=17, multiple response question)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Reason | Size of Company | | | | Total (n) |
| <10 | 10-49 | 50-249 | 250-499 |
| We are currently forming one as part of our preparation to export | 5 | 6 | 1 | 0 | 12 |
| Do not need one | 0 | 0 | 0 | 0 | 0 |
| Do not have the time to develop one | 1 | 1 | 1 | 0 | 3 |
| Cannot afford the cost of using an external source to develop one |  |  |  |  |  |
| Do not have in-house expertise to develop one | 1 | 2 | 1 | 0 | 4 |
| Other | 0 | 0 | 1 | 0 | 1 |

The one ‘other’ response was as follows:

* Currently trying to recruit a Business Development Manager to oversee Sales / Marketing growth.

Of those that did have a sales and marketing plan in place (n=13), less than half (n=6) stated that it covered sales development on a market by market basis, however just over three quarters (n=10) stated that exporting formed a specific element within their sales and marketing plan.

Future Exporting Activity

80% (n=24) companies stated that they had conducted business outside of the UK within the last three years; the remaining 20% (6) stated they had not but were planning to start. The table below shows the markets that the responding companies were preparing to export to:

Table 7: Future markets (n=30, multiple response question)

| Market | Number |
| --- | --- |
| Republic of Ireland | 24 |
| Denmark | 6 |
| Poland | 4 |
| Czech Republic | 1 |
| France | 10 |
| Germany | 8 |
| Sweden | 5 |
| Brazil | 2 |
| Russia | 3 |
| India | 2 |
| China | 1 |
| Hong Kong | 2 |
| Singapore | 4 |
| Kingdom of Saudi Arabia | 1 |
| United Arab Emirates | 4 |
| Kurdistan | 1 |
| South Africa | 6 |
| Canada | 5 |
| United States of America | 6 |
| Mexico | 1 |
| Australia | 5 |
| New Zealand | 2 |
| Other | 10 |

Other countries included:

* Mainland UK/Great Britain;
* Holland;
* Baltics;
* Poland;
* Portugal; and
* Hungary.

As shown, the most common country selected was the Republic of Ireland (n=24), followed by France (n=10) and Germany (n=8). When asked for rationale behind choosing these markets, the most common reason was ‘due to independent research conducted by the company’ (n=12), followed by ‘competitors have entered the market’ (n=11).

Barriers to Exporting

Table 8: Barriers to exporting (n=28[[1]](#footnote-2), multiple response question)

| Barrier | Number |
| --- | --- |
| Difficulty in establishing a dialogue with prospective customers or partners | 14 |
| Transport costs | 14 |
| Obtaining information on an export market | 13 |
| Pressure on management time | 10 |
| Setting competitive prices | 9 |
| Staff not trained | 9 |
| Resource/staff constraints | 8 |
| Language/cultural differences | 8 |
| Finance | 7 |
| Currency/exchange rates | 7 |
| Legislation/standards | 7 |
| Export documentation | 6 |
| Payment difficulties | 6 |
| Preference by overseas customers to work with firms in their own country | 4 |
| Warranty or service support | 4 |
| Import tariffs | 3 |
| Products unsuitable for export | 2 |
| No spare production capacity | 1 |
| Identifying appropriate trade partners | 1 |

This shows that most common perceived barriers to exporting from the perspective of those preparing to export were:

* Transport costs (50%, n=14);
* Difficulty in establishing a dialogue with prospective customers or partners (50%, n=14);
* Obtaining information on an export market (46%, n=13); and
* Pressure on management time (36%, n=10).

Marketing Resources and Skills

Only 9 companies stated that they currently employ professional marketing staff[[2]](#footnote-3), with a further 11 stating it was their intention to employ professional marketing staff in the future.

The 11 that plan to employ professional marketing staff then stated that they would ensure that these staff have the appropriate skills by:

* Reviewing experience and qualifications;
* Requesting advice from Invest NI;
* Getting advice internally from HR; and
* Through appropriate selection process and training.

Companies were then asked how many marketing staff they had at entry level, middle management level and senior level. The responses are shown in table 14[[3]](#footnote-4).

Table 9: Number of marketing staff at each level (n= 25) [[4]](#footnote-5)

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Level | Number | | | | | | |
| 0 | 1 | 2 | 3 | 4 | 5 | 6+ |
| Entry Level – covers: Marketing Officer, Marketing Assistant, Researcher, etc. **(n=25)** | 13 | 10 | 1 | - | 1 | - | - |
| Middle Management covers Marketing Manager, Brand Manager etc. **(n=25)** | 12 | 8 | 2 | 3 | - | - | - |
| Senior Management/Director – Marketing Director; Brand Director; Sales/ Marketing Director; Export director etc. **(n=25)** | 12 | 13 | - | - | - | - | - |

The most commonly stated highest qualification held by entry level staff was either a postgraduate degree (n=5) or degree in marketing (n=5). In relation to middle management was a diploma/certificate level qualification (n=6) and senior management was post graduate degree (n=5) or diploma/certificate level qualification (n=5%).

Companies were asked whether they had experienced any difficulties in recruiting qualified or experienced marketing staff, at senior management, middle management and entry level. The majority of companies (n=18) indicated that they ‘did not know’ whether they had experienced any difficulties with regard to recruiting qualified and experienced marketing staff at a senior management level; however, a minority of consultees (n=4) responded that it was ‘very difficult’. In relation to both middle management and entry level, the majority of consultees (n=12 for both) responded that again they ‘did not know’ if they had experienced any difficulties in recruiting qualified and experienced marketing staff. However, 16% (n=4) of respondents stated it was ‘not difficult all’ to recruit qualified and experienced market staff at entry level, compared to 16% (n=4) of consultees stating that it was ‘quite difficult’ to recruit qualified and experienced marketing staff at middle management level.

Companies were then asked to assess the competency of their staff in relation to a number of areas. The responses are shown in the following table:

Table 10: Competency of marketing staff (n=25)

| Competency Area | Incompetent / Slightly Incompetent | Moderately Competent / Quite Competent | Very competent / Extremely Competent | Do not know |
| --- | --- | --- | --- | --- |
| Conduct Market Research to a Professional Standard  (n=25) | 32% (n=8) | 36% (n=9) | 28% (n=7) | 4% (n=1) |
| Commercially interpret statistics and prepare financial Information related to market analysis  (n=25) | 32% (n=8) | 40% (n=10) | 20% (n=5) | 8% (n=2) |
| Develop a sales forecast including sales channel market analysis  (n=25) | 32% (n=8) | 36% (n=9) | 24% (n=6) | 8% (n=2) |
| Develop Marketing Strategies in response to market opportunities identified through research  (n=25) | 24% (n=6) | 44% (n=11) | 28% (n=7) | 4% (n=1) |
| Prepare tactical plans for - Market Entry and Market Growth  (n=25) | 32% (n=8) | 36% (n=9) | 24% (n=6) | 8% (n=2) |
| Prepare tactical plans for - Channel Development and Sales Strategy  (n=25) | 40% (n=10) | 28% (n=7) | 24% (n=6) | 8% (n=2) |
| Prepare tactical plans for - Promotional Activity  (n=25) | 32% (n=8) | 32% (n=8) | 28% (n=7) | 8% (n=2) |
| Prepare tactical plans for - Digital Marketing  (n=25) | 48% (n=12) | 28% (n=7) | 20% (n=5) | 4% (n=1) |
| Prepare tactical plans for - Promotion, digital/on line actions for each export market  (n=25) | 36% (n=12) | 20% (n=5) | 24% (n=6) | 8% (n=2) |
| Deliver on the tactical plans developed  (n=25) | 28% (n=7) | 36% (n=9) | 28% (n=7) | 8% (n=2) |

This shows that the areas where companies felt their staff were least competent (i.e. moderately competent and below) were:

* Preparing tactical plans for - Channel Development and Sales Strategy;
* Preparing tactical plans for - Promotional Activity;
* Preparing tactical plans for - Digital Marketing;
* Preparing tactical plans for - Promotion, digital/on line actions for each export market; and
* Delivering on the tactical plans developed.

The areas were staff felt their staff were most competent (i.e. quite competent and above) included:

* Commercially interpreting statistics and preparing financial Information related to market analysis;
* Developing a sales forecast including sales channel market analysis;
* Developing Marketing Strategies in response to market opportunities identified through research; and
* Preparing tactical plans for - Market Entry and Market Growth.

Most staff gained their relevant skills through training provided by the company (28%, n=7/25) or had relevant qualifications and experience (20%, n=5/25). [[5]](#footnote-6)

Sales Resources and Skills

The majority of companies (17/25) [[6]](#footnote-7) reported that they currently employ professional sales staff; 6 companies stated that they are intending to employ professional sales staff in the future and 2 firms indicated that they have no intention of recruiting professional sales staff in the future.

The 6 that plan to employ professional marketing staff then stated that they would ensure that these staff have the appropriate skills by:

* Recruiting experienced individuals;
* Using a recruitment specialist; and
* Through international contacts and research.

Companies were then asked how many sales staff they had at entry level, middle management level and senior level. The responses are shown in the table below:

Table 11: Number of sales staff at each level (n= 23) [[7]](#footnote-8)

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Level | Number | | | | | | |
| 0 | 1 | 2 | 3 | 4 | 5 | 6+ |
| Entry Level – Sales Executive, Sales Assistant, Sales/ Marketing Officer etc. **(n=22)** | 12 | 2 | 3 | - | 1 | 3 | 1[[8]](#footnote-9) |
| Middle Management Level- Sales Manager, Sales/ Marketing Manager **(n=22)** | 13 | 3 | 2 | 3 | - | - | 1[[9]](#footnote-10) |
| Senior Management/Director Level- Sales Director/ Sales/ Marketing Director **(n=23)** | 9 | 8 | 5 | - | 1 | - | - |

The most commonly stated highest qualification held by entry level staff was through training received within the company (n=9 of 20 responses). This was also the case for middle management positions (n=6, of 11 responses) and senior management (n=7 of 19 responses).

When asked how difficult it was to recruit staff with the appropriate experience and qualifications, most respondents did not know.

Companies were then asked to assess the competency of their staff in relation to a number of areas. The responses are shown in the table overleaf:

Table 12: Competency of sales staff (n=21) [[10]](#footnote-11)

| Competency Area | Incompetent / Slightly Incompetent | Moderately Competent / Quite Competent | Very competent / Extremely Competent | Do not know |
| --- | --- | --- | --- | --- |
| Able to develop a sales strategy for each market  (n=21) | 5% (n=1) | 48% (n=10) | 33% (n=7) | 14% (n=3) |
| Able to identify sales prospects in markets in line with targets set in plan  (n=21) | 5% (n=1) | 43% (n=9) | 38% (n=8) | 14% (n=3) |
| Able to develop relationships with prospective clients (n-21) | 5% (n=1) | 33% (n=7) | 48% (n=10) | 14% (n=3) |
| Able to sell your company’s services / products (n=21) | 5% (n=1) | 33% (n=7) | 48% (n=10) | 14% (n=3) |
| Able to close the sale (n=21) | 5% (n=1) | 38% (n=8) | 43% (n=9) | 14% (n=3) |
| Able to provide follow up customer service (n=21) | 5% (n=1) | 29% (n=6) | 52% (n=11) | 14% (n=3) |

This shows that very few companies viewed their staff as below quite competent. The area where companies felt their staff were least competent (i.e. moderately competent) was:

* Able to develop a sales strategy for each market.

The areas were staff felt their staff were mostly competent (i.e. quite, very and extremely competent) included:

* Able to identify sales prospects in markets in line with targets set in plan;
* Able to develop relationships with prospective clients;
* Able to sell your company’s services / products;
* Able to close the sale; and
* Able to provide follow up customer service.

Most staff gained their relevant skills prior to recruitment and were recruited based on their experience (not qualifications) (38%, n=8/21) or had relevant qualifications (38%, n=8/21). [[11]](#footnote-12)

Demand and Training for Sales and Marketing Resources and Skills

65% (n=15/23) companies stated that they had a need for sales/marketing/export staff. 80% indicated that they specifically needed staff that had previous experience. 78% (n=18/23) then stated that they expected their need for sales/marketing/export would increase within the next two to three years. No companies stated that their need would decrease. [[12]](#footnote-13)

Those that stated they saw their need increasing (n=18), were then asked to specify how many staff they thought they would need. Thus within the next two to three years, 18 companies expect to require am accumulated total of 199 individuals with sales and marketing skills for exporting.

60% of companies said they trained the existing sales and marketing staff (n=14/23). 9% (n=2/23) said they did not train existing staff. This training is provided at cost of, on average, £2,000 per annum (based on 13 responses).

Most (n=12 of 13 respondents) of this training has been delivered by private providers.

International Business Communication

74% (n=17/23) [[13]](#footnote-14) of companies preparing to export stated they did not have a need for staff with proficiency in other languages. When asked why this was, most (94%, n=16/17) stated that it was due to the countries they were going to export to facilitated English speaking countries. 94% (n=16 of 17 responses) then stated they would were not planning on recruiting any staff that were proficient in other languages.

When asked if their staff had International cultural awareness skills related to business, [[14]](#footnote-15) 10 stated that they did and 12 stated that they did not. 5 stated that their staff did have these skills due to their qualifications, with 2 stating that they were recruited based on their experience.

Of this 22, the majority (86%) stated they did not train staff in cultural awareness skills and 64% stated they had no need for staff with these skills. Of those that did state they have a need for staff with cultural awareness skills (36%), most needed experienced staff, rather than graduate or other.

Appendix 3: Exporters Survey

Company Profiles

Consistent with the general landscape of business in N, the large majority of exporters in NI were micro business and SMEs (0-250 employees).

Table 3: Size of Company (n=119)

|  |  |  |
| --- | --- | --- |
| Number of Employees | Total (%) | Total (n) |
| <10 | 20.2% | 24 |
| 10-49 | 27.7% | 33 |
| 50-249 | 33.6% | 40 |
| 250-499 | 10.9% | 13 |
| 500-999 | 4.2% | 5 |
| 1000+ | 3.4% | 4 |
| Total | 100% | 119 |

The following table outlines the range of industries, within which the respondent companies currently operate within. The majority (52.9%) of company responses were from companies within the manufacturing sector.

Table 4: Sectors (n=119)

| Sector | Total (%) | Total (n) |
| --- | --- | --- |
| Agriculture, Forestry and Fishing | 4.2% | 5 |
| Mining and Quarrying | 1.7% | 2 |
| Electricity, Gas, Steam and Air Conditioning | 1.7% | 2 |
| Water Supply: Sewerage, Waste Management and Remediation Activities | 0.8% | 1 |
| Construction | 7.6% | 9 |
| Wholesale and Retail Trade: Repair of Motor Vehicles and Motorcycles | 1.7% | 2 |
| Transportation and Storage | 0.0% | 0 |
| Accommodation and Food Service Activities | 0.8% | 1 |
| Information and Communication | 5.0% | 6 |
| Financial and Insurance Activities | 1.7% | 2 |
| Real Estate Activities | 0.0% | 0 |
| Professional, Scientific and Technical Activities | 5.9% | 7 |
| Administrative and Support Service Activities | 0.0% | 0 |
| Public Administration and Defence; Compulsory Social Security | 0.0% | 0 |
| Education | 0.0% | 0 |
| Human Health and Social Work Activities | 0.8% | 1 |
| Arts, Entertainment and Recreation | 1.7% | 2 |
| Other Service Activities | 13.4% | 16 |
| Activities of Households as Employers; Undifferentiated Goods- and Services-Producing Activities of Households for own use | 0.0% | 0 |
| Activities of Extraterritorial Organisations and Bodies | 0.0% | 0 |
| Manufacturing Please Pick from below: | 0.0% | 0 |
| Manufacturing – food, drink and tobacco; | 9.2% | 11 |
| Manufacturing - chemicals and pharmaceuticals; | 3.4% | 4 |
| Manufacturing- rubber and plastics; | 3.4% | 4 |
| Manufacturing – computing, electronic and optical; | 5.0% | 6 |
| Manufacturing – machinery and equipment; | 8.4% | 10 |
| Manufacturing – transport equipment; and | 4.2% | 5 |
| Total | 100% | 119 |

The table below identifies the length of time the respondents had been trading. As can be expected the majority of exporters were generally well established.

Table 5: Length of Time Company Has Been Trading (n=119)

|  |  |  |
| --- | --- | --- |
| Time | Total (%) | Total (n=119) |
| 1 to 5 years | 9.2% | 11 |
| 6 to 10 years | 10.9% | 13 |
| 11 to 15 years | 12.6% | 15 |
| 16 to 20 years | 6.7% | 8 |
| 21 to 25 years | 5.9% | 7 |
| 25+ | 54.6% | 65 |
| Total | 100% | 119 |

Table 6: Reasons for Not Having a Sales/Marketing Plan

|  |  |  |
| --- | --- | --- |
| Reason | Total (%) | Total (n=51) |
| Do not have in-house expertise to develop one | 7.8% | 4 |
| Do not need one | 52.9% | 27 |
| Do not have the time to develop one | 23.5% | 12 |
| Cannot afford the cost of using an external source to develop one | 15.7% | 8 |
| Other (Please Specify) | 5.9% | 7 |
| Total | 100% | 51 |

Table 7: Reasons for Not Trading Outside the UK

|  |  |  |
| --- | --- | --- |
| Reason | Total (%) | Total (n=16) |
| Have no need, UK market is sufficient for our company | 25.0% | 4 |
| Product/service is not appropriate for sales outside the UK | 31.3% | 5 |
| Would require substantial resources and we have other priorities | 18.8% | 3 |
| Perceptions are that the barriers to overcome would be too difficult | 12.5% | 2 |
| Other (Please Specify) | 5.9% | 7 |
| Total | 100% | 16 |

Table 8: Motivation for Trading Outside the UK

|  |  |  |
| --- | --- | --- |
| Reason | Total (%) | Total (n=16) |
| To achieve our growth goals | 65.2% | 75 |
| Higher profit margins outside UK | 20.0% | 23 |
| Utilise existing capacity | 33.9% | 39 |
| Reduce dependency on small number of markets | 41.7% | 48 |
| Opportunity to keep abreast of developments | 13.9% | 16 |
| International markets have always been relevant | 41.7% | 48 |
| Total | 100% | 16 |

Table 8: Current Export & Proposed Export Destinations[[15]](#footnote-16)

| Country | Existing export destinations | Proposed export destinations within next 3 years | Total |
| --- | --- | --- | --- |
| Republic of Ireland | 80 | 11 | 83 |
| Denmark | 24 | 9 | 32 |
| Poland | 26 | 8 | 33 |
| Czech Republic | 17 | 9 | 25 |
| France | 34 | 18 | 50 |
| Germany | 32 | 18 | 50 |
| Sweden | 28 | 9 | 36 |
| Turkey | 18 | 5 | 23 |
| Chile | 13 | 5 | 18 |
| Colombia | 13 | 4 | 17 |
| Brazil | 15 | 9 | 23 |
| Russia | 21 | 4 | 25 |
| India | 18 | 4 | 22 |
| China | 15 | 7 | 22 |
| Hong Kong | 19 | 3 | 21 |
| South Korea | 13 | 3 | 16 |
| Thailand | 16 | 5 | 20 |
| Singapore | 22 | 5 | 27 |
| Kingdom of Saudi Arabia | 23 | 6 | 28 |
| United Arab Emirates | 25 | 10 | 34 |
| Kurdistan | 8 | 3 | 11 |
| Libya | 8 | 5 | 13 |
| Malaysia | 18 | 4 | 22 |
| South Africa | 26 | 6 | 31 |
| Canada | 23 | 10 | 31 |
| United States of America | 40 | 16 | 52 |
| Mexico | 11 | 5 | 16 |
| Australia | 28 | 11 | 38 |
| New Zealand | 18 | 7 | 25 |

Table 9: Barriers to exporting (multiple response question)

| Barrier | Number | Total (n=99) |
| --- | --- | --- |
| Obtaining information on an export market | 23.2% | 23 |
| Products unsuitable for export | 65.0% | 13 |
| No spare production capacity | 8.1% | 8 |
| Difficulty in establishing a dialogue with prospective customers or partners | 26.3% | 26 |
| Language/cultural differences | 23.2% | 23 |
| Preference by overseas customers to work with firms in their own country | 27.3% | 27 |
| Payment difficulties | 9.1% | 9 |
| Finance | 19.2% | 19 |
| Setting competitive prices | 27.3% | 27 |
| Currency/exchange rates | 22.2% | 22 |
| Import tariffs | 17.2% | 17 |
| Transport Costs | 25.3% | 25 |
| Staff not trained for this | 9.1% | 9 |
| Pressure on management time | 20.2% | 20 |
| Legislation/standards | 17.2% | 17 |
| Export documentation | 10.1% | 10 |
| Warranty or service support | 7.1% | 7 |
| Resource (staff) Complaints | 26.3% | 26 |
| Other | 16.2% | 16 |

Appendix 4: Non-Exporters Survey

Company Profiles

Of the 71 companies that responded, most (42%) were in business 21-25 years, followed by more than 25 (31%) and 1-5 years (20%).

The majority of companies (61%) were micro (less than 10 employees). The following table details the sizes of responding companies.

Table 5: Size of Company (n=71)

|  |  |  |
| --- | --- | --- |
| Number of Employees | Total (%) | Total (n) |
| <10 | 61% | 43 |
| 10-49 | 21% | 15 |
| 50-249 | 13% | 9 |
| 250-499 | 4% | 3 |
| 500-999 | 1% | 1 |
| 1000+ | 0% | 0 |
| Total | 100% | 71 |

The following table demonstrates the sectors that the 71 companies were associated with:

Table 6: Sectors (n=71)

| Sector | Total (%) | Total (n) |
| --- | --- | --- |
| Manufacturing | 34.7% | 25 |
| Professional, scientific and technical activities | 22.2% | 16 |
| Wholesale and retail trade: Repair of Motor Vehicles and Motorcycles | 12.5% | 9 |
| Agriculture, Forestry and Fishing | 8.3% | 6 |
| Construction | 6% | 4 |
| Administrative and Support Service Activities | 6% | 4 |
| Financial and Insurance Activities | 4.2% | 3 |
| Accommodation and Food Service Activities | 3% | 2 |
| Information and Communication | 1% | 1 |
| Real Estate Activities | 1% | 1 |
| Total | 100% | 71 |

The following table breaks this information down by size of company.

Table 7: Sectors by size of company (n=71)

|  | Size of Company | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Sector | <10 | 10-49 | 50-249 | 250-499 | 500-999 | Total (n) | Total (%) |
| Manufacturing | 13 | 5 | 6 | 0 | 1 | 25 | 35% |
| Professional, scientific and technical activities | 10 | 5 | 1 | 0 | 0 | 16 | 22% |
| Wholesale and retail trade: Repair of Motor Vehicles and Motorcycles | 8 | 1 | 0 | 0 | 0 | 9 | 12.5% |
| Agriculture, Forestry and Fishing | 3 | 2 | 1 | 0 | 0 | 6 | 8% |
| Construction | 2 | 0 | 1 | 1 | 0 | 4 | 6% |
| Administrative and Support Service Activities | 4 | 0 | 0 | 0 | 0 | 4 | 6% |
| Accommodation and Food Service Activities | 1 | 1 | 0 | 0 | 0 | 2 | 3% |
| Financial and Insurance Activities | 1 | 1 | 0 | 1 | 0 | 3 | 4% |
| Information and Communication | 1 | 0 | 0 | 0 | 0 | 1 | 1% |
| Real Estate Activities | 0 | 0 | 0 | 1 | 0 | 1 | 1% |
| Total (n) | 43 | 15 | 9 | 3 | 1 | 71 (100%) | |
| Total (%) | 61% | 21% | 13% | 4% | 1% |
| Source: RSM McClure Watters Survey Data 2013 | | | | | | | |

This shows that 60% of respondents employed less than 10 staff (i.e. micro companies); most (n=12, 17%) of the responding companies were micro and in the manufacturing sector, followed by micro in the professional, scientific and technical activities sector (n=9, 13%) and micro in the wholesale and retail trade: repair of motor vehicles and motorcycles (n=7, 10%).

Sales and Marketing Information

70% (50) of respondents did not have a written sales and marketing plan in place. The following tables shows the reasons for this broken down by size of company and sector, however in summary, the main response for not having a sales and marketing plan was that the respondent felt there was no need for one (n=36). This was the case across all sizes of companies and sectors. The second most common response was ‘other’ (n=16). Other responses included:

* Plan being developed;
* No need for one as various reasons given, namely:
* Sales come through their web site;
* The industry keeps changing;
* Sales are mostly due to repeat business;
* Business is generated through word of mouth and recommendations;
* Lack of enthusiasm
* Time constraints ; and
* Not sure.

Table 8: Reasons for not having a sales and marketing plan by size of company (n=50, multiple response question)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Reason | Size of Company | | | | | Total (n) |
| <10 | 10-49 | 50-249 | 250-499 | 500-999 |
| Do not need one | 28 | 3 | 4 | 1 | - | 36 |
| Do not have the time to develop one | 6 | 4 | 2 | - | - | 12 |
| Cannot afford the cost of using an external source to develop one | 4 | 2 | 2 | - | - | 8 |
| Do not have in-house expertise to develop one | 4 | 2 | 1 | - | - | 7 |
| Other | 10 | 2 | 4 | - | - | 16 |
| Source: RSM McClure Watters Survey Data 2013 | | | | | | |

Table : Reasons for not having a sales and marketing plan by sector (n=50, multiple response question)

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Reason | Sector | | | | | | | | | | | Total (n) |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| Do not need one | 11 | 8 | 5 | 5 | 1 | 2 | - | - | 1 | 1 | 2 | 36 |
| Do not have the time to develop one | 7 | 1 | 2 | - | - | - | 1 | 1 | - | - | - | 12 |
| Cannot afford the cost of using an external source to develop one | 6 | - | - | - | 1 | - | - | 1 | - | - | - | 8 |
| Do not have in-house expertise to develop one | 5 | - | - | - | 1 | - | - | - | - | - | 1 | 7 |
| Other | 7 | 4 | - | 3 | 1 | - | 1 | - | - | - |  | 16 |
| Source: RSM McClure Watters Survey Data 2013 | | | | | | | | | | | | |

Key:

7=Accommodation and Food Service Activities

8=Financial and Insurance Activities

9=Information and Communication

10=Real Estate Activities

11= Other

1=Manufacturing

2=Professional, scientific and technical activities

3=Wholesale and retail trade: Repair of Motor Vehicles and Motorcycles

4=Agriculture, Forestry and Fishing

5=Construction

6=Administrative and Support Service Activities

The remaining 21 (30%) of companies stated that they did have a written sales and marketing plan. These sales and marketing plans covered the following markets:

Table 10: Markets covered (n=21) [[16]](#footnote-17)

|  |  |
| --- | --- |
| Market | Total (n) |
| Other parts of the United Kingdom (excluding Northern Ireland) | 9 |
| Northern Ireland | 11 |
| Republic of Ireland | 9 |
| Europe | 1 |
| USA | 1 |
| Other | 4 |
| Source: RSM McClure Watters Survey Data 2013 | |

‘Other’ included answers that were not relating to countries, and included, for example, sectors that they were involved in trade with such as “Architecture”.

Interest in Exporting

Non-exporting companies were asked if they have ever considered or would they consider exporting in the future. 41% (n=29) stated that they have or would consider exporting, 44% (n=31) stated they would not and 15% (11) stated that it would depend.

Those that stated they would or have considered exporting or that it depends were then asked which markets they would consider exporting to. Of the 41% that stated they have or would consider exporting, and the 15% that said it would depend, the most commonly selected markets were Great Britain (n=36) and the Republic of Ireland (n=36). More detail is provided in the following table:

Table 11: Markets considered (n=40, multiple response question)

| Market | Total (n) |
| --- | --- |
| Great Britain | 36 |
| Republic of Ireland | 36 |
| Latin America | 3 |
| Brazil | 3 |
| Russia | 5 |
| India | 2 |
| China | 3 |
| Middle East | 7 |
| Europe | 17 |
| Other | 9 |

The European and “Other” countries included:

* Canada;
* Poland;
* France;
* Germany;
* Spain;
* Africa;
* USA;
* Malta; and
* New Zealand.

Barriers to Exporting

24% of the companies that responded felt that lack of supply of individuals with relevant skills was a barrier that prevented them from exporting or considering exporting.

In addition, 45% (n=32) of the 71 companies felt that the cost of upskilling their workforce was a barrier, with same number (n=32) feeling that the cost of recruiting staff with relevant skills was a preventative factor.

52 of the companies also stated additional factors that they felt prevented them from exporting. These included:

* That exporting was not suitable for the nature of their business in general;
* The current economic environment;
* That bringing in additional staff with relevant skills was risky (in case exporting did not take off);
* Costs of marketing activities;
* Logistics too difficult;
* Difficulty gaining information on new markets;
* No profit margin;
* Lack of supply;
* Capacity issues;
* Insurance difficulties; and
* The varying standards and regulations in other countries.

To help overcome these barriers, companies specified that the following help was needed:

* Information on market opportunities, that could be accessed at a low cost;
* Inspiration, guidance and research into identification of what is exportable;
* Financial support and incentives with the costs involved in exporting ;
* A graduate programme, for example the Explorers Programme. If Invest NI was willing to provide someone willing to travel abroad to complete research ;
* Access to foreign contacts, access to foreign trade shows/fairs etc.; and
* More collaboration with other NI companies to share and reduce transport costs to Europe
* More opportunities to meet foreign contacts.

Awareness of Supports

Companies were asked if they were aware of the various support programmes for companies that want to export or that currently export. The following table shows the numbers that were aware and that were not aware by programme:

Table 12: Awareness of programmes (n=71)

| Programme | Aware | | Not Aware | | Total | |
| --- | --- | --- | --- | --- | --- | --- |
|  | N | % | N | % | N | % |
| Sales and marketing skill supports | | | | | | |
| Acumen (sales & marketing) | 30 | 42% | 41 | 58% | 71 | 100% |
| Other supports | | | | | | |
| Challenge (strategic planning) | 3 | 4% | 68 | 96% | 71 | 100% |
| FP7 Support (European funding (FP7)) | 8 | 12% | 63 | 88% | 71 | 100% |
| Elevate (sales development) | 14 | 20% | 57 | 80% | 71 | 100% |
| Fusion (collaborative innovation) | 21 | 30% | 50 | 70% | 71 | 100% |
| Innova (company to company R&D) | 14 | 20% | 57 | 80% | 71 | 100% |
| Go2Tender (tendering and procurement) | 12 | 17% | 59 | 83% | 71 | 100% |
| Equity Network | 4 | 6% | 67 | 94% | 71 | 100% |
| All-island Innovation Programme | 23 | 32% | 48 | 68% | 71 | 100% |
| First Stop Shop & Trade Accelerator Vouchers | 8 | 11% | 63 | 89% | 71 | 100% |
| Seedcorn (business competition) | 10 | 14% | 61 | 86% | 71 | 100% |
| Business Information Service | 30 | 42% | 41 | 58% | 71 | 100% |
| Consultancy Services | 29 | 41% | 42 | 59% | 71 | 100% |
| Export Workshops | 31 | 44% | 40 | 56% | 71 | 100% |
| Trade Missions | 38 | 54% | 33 | 46% | 71 | 100% |
| Trade Exhibitions | 43 | 61% | 28 | 39% | 71 | 100% |
| In-Market Support | 13 | 18% | 58 | 82% | 71 | 100% |
| Trade Advisory Service | 26 | 37% | 45 | 63% | 71 | 100% |
| Northern Ireland Trade Development Centres | 19 | 27% | 52 | 73% | 71 | 100% |
| Going Dutch | 9 | 13% | 62 | 87% | 71 | 100% |

This demonstrates that the supports that the respondent companies were most aware of were Trade Exhibitions (61%) followed by the Trade Missions (54%). All remaining supports received a response of less than 50% in relation to awareness, highlighting a significant unawareness of many of the existing supports. Therefore, they may be a need for increased marketing of supports for businesses that have export potential. Particularly in relation to export sales and marketing skills, Acumen was recognised by only 42% of respondents.

Skills in existing workforce

Companies were asked how many of their existing employees already had the relevant skills needed for international exporting. The responses to this are broken down in the following table, by size of company.

Table 13: Existing skills in workforce (n=71)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Skills | Levels of staff proficiency with exporting. | | | | |
| 0% | 1-25% | 26-50% | 51-99% | 100% |
| Professional sales skills | 47 | 16 | 4 | 1 | 3 |
| Strategic export marketing skills | 51 | 15 | 3 | 0 | 2 |
| International (or intercultural) Business Communication skills | 58 | 11 | 0 | 0 | 2 |
| Competence in cultural awareness of different traditions | 56 | 11 | 1 | 0 | 3 |

The above table shows that most companies did not have any significant percentage of existing staff with the appropriate skills for exporting. The skills area that was most lacking, was international (or intercultural) business communication skills, i.e. the learned ability to use foreign languages in a business context, with 58 (82%)of the 71 companies stating they had 0% of staff with these skills, however all skills areas are very close (47 stated 0% for professional sales skills, 51 stated 0% for strategic exporting skills and 56 stated 0% for competence in cultural awareness).

Additional Comments

Additional comments made were generally positive, for example:

“As a small company however it is difficult (especially in the current economic environment) to devote time and resources to getting all the information required to actually enter these markets. It would be extremely helpful if there was an organisation which could provide cost effective information and research data about entering new countries”.

“Invest NI have been very good in supporting our exports to ROI and GB, and we would appreciate supports like market research for Europe before we seriously considered expanding to meet the demands of that market”.

Other comments reiterated the need for staff with appropriate skills, and financial constraints which cause barriers for exporting.

APPENDIX 5: Focus Groups

Focus Group 1

Focus group 1 was completed with 12 pupils and a careers advisor from the school faculty. Of the sample of pupils, 9 were male and 3 were female, and all were at “Lower Sixth” level (AS level).The pupils were studying a varied number of topics, not being chosen from a particular class or subject, instead chosen from a general “careers” class.

The pupils were introduced to the research, and were initially asked if they had any opinions on marketing, exporting, and sales in general, and when questioned further, none of the pupils revealed a current intention to pursue a career in sales or export marketing. The pupils were then asked about their understanding of the scope of careers in sales, export marketing and business communication, but they confessed to having very poor knowledge of the subject.

When pressed further on the subjects of sales and marketing in particular, the knowledge of marketing was particularly low, with knowledge of sales extending not much further, and none of the pupils said they knew what a career in these fields would entail. Similarly when asked what skills would be necessary or helpful, the pupils remained silent. Concerning language skills, only one of the students was pursuing a language at AS level (German), whilst explicitly saying that this would not be pursued through further education.

Amongst the pupils who provided individual answers as to their intended careers, these included “Music technician”, “Physiotherapist”, “Accountant,” and “Particle Physicist”. When explicitly questioned as to their intention or willingness to explore a career in marketing or sales within these fields, the pupils explicitly stated that they had no interest.

Overall, knowledge and enthusiasm for “business” was observed to be very low, but that many of the pupils had not made definitive career choices yet. It was noted, however, that none of the students had any intention of studying marketing, sales, or languages at a university level. Additionally of note was that none of the pupils had approached the careers advisor regarding opportunities for developing a career in marketing or sales, and that the pupils had received no “one to one” guidance or advocacy for such a career choice.

Focus Group 2

Focus group 2 consisted of ten male pupils aged between 16 and 17. Woodwork, ICT, science and geography were most commonly listed subjects the student were undertaking or enjoyed.

When initially asked what comes to mind when asked about sales and marketing, students referred to selling door to door or cold calling.

When asked about exporting and what it meant to them, some mentioned global marketing, foreign investment, sales, and dealing with other countries, however when asked if they could elaborate, none were able to expand, and felt that they were able to repeat buzz words they had heard before. No students were able to specify any careers.

Awareness of career opportunities in sales/ marketing or exporting was very limited, in particular for exporting, and in most cases students had not considered what they might do at college level.

When given some additional background on the types of careers which could be undertaken in sales/marketing or exporting, none of the students were able to comment on what sort of skills they might need for this, or what kind of duties might be involved. When pressed, one student suggested that business and ICT might be important.

Only one of ten students was participating in a language (Spanish) and when asked if he would consider carrying it on to college he said definitely not. It was too hard and he was not interested in it. Most students stated that when choosing subjects it was primarily about taking something they found easy or that they were interested in.

When asked about who influences them in relation to careers, all students said that parents or teachers had no influence, with the exception of a careers adviser from DEL (Department for Employment and Learning) who visited students once a week for one on one chats. However according to the students, at this stage most of the conversations with the DEL adviser was based on what subjects they may undertake for A level, with little focus on actual careers.

Focus Group 3

Focus group 3 consisted of 8 female pupils aged between 16 and 17. Health and social care, business ICT, science and history were most commonly listed subjects the student were undertaking or enjoyed.

When initially asked what comes to mind when asked about sales and marketing, students referred to retail or business in general.

When asked about exporting and what it meant to them, they were able to give an example of Tayto because they had used it as a case study in business class. However despite having covered exporting in class, they said they had little recollection of what it involved,

Awareness of career opportunities in sales/ marketing or exporting was very limited in particular for exporting, most students preferred to work in clothes shops.

When given some additional background on the types of careers which could be undertaken in sales/marketing or exporting, none of the students were able to comment on what sort of skills they might need for this, or what kind of duties might be involved.

Only one of ten students was participating in a language (French) and when asked if he would consider carrying it on to college she said probably not. It was too hard and it no longer interested her. Most students stated that when choosing subjects it was primarily based on their current grades. Grades pre-determine which subjects they are allowed to choose in the following A level years. From this point subject choice is based on what they like or are interested in.

Travel was not something that appealed to any of the students, with the exception of one who was considering being an airhostess. However, she had no intention of learning a language.

Although many students spoke about the idea that travel as part of a career would appeal to them, of those who had an idea of what they may like to do in the future which included careers as; teachers, business management, medicine or engineering,

When asked about who influences them in relation to careers, all students said that teachers influence them, in that they discuss possibilities particularly in relation to whether they could afford to attend college and the idea of moving away from home. Additionally a careers adviser (they were unsure where from) visited the school every day and was available for students to make appointments to speak to him/her. When this adviser first came to the school it was compulsory for all A-Level students to attend once. However no students had made subsequent appoints since them. Student also reported that the advice was helpful but due to the number of students attending in the first instance, the session was rushed and the adviser could only spend 15 minutes with each student. Students felt if they spoke to the adviser for longer the next time, it would definitely be worthwhile for them to attend.

When asked what might encourage them to undertake a subject or interest in sale/marketing and exporting, student felt that examples of careers in those areas from job sites or within their local area would give them a good idea of what might be involved and give them realistic expectations. All students from this school were given the opportunity to do one week of work placement in year 13 and again in year 14. Most appeared to enjoy their experience in primary schools and hotels, and some in businesses, however they felt that the range of areas for work experience was limited. The students also attended a careers fair in a nearby hotel on year 13. They felt this was not very beneficial because they were not sure what areas most of the companies operated in and were not sure how to approach them.

Focus Group 4

Focus group 4 consisted of ten male pupils aged between 16 and 17. Woodwork, ICT, science and geography were most commonly listed subjects the student were undertaking or enjoyed.

When initially asked what comes to mind when asked about sales and marketing, students referred to business and travelling abroad. One student mentioned exporting.

When asked about exporting and what it meant to them, some mentioned ‘making sure goods get to where they are supposed to go’, and having good people skills was also something that came to mind. No students were able to specify any actual careers.

Awareness of career opportunities in sales/ marketing or exporting was very limited, particularly in relation to exporting.

In most cases students had not considered what they might do at college level. Most of the students stated that any career discussions were based around achieving the grades they needed at A-level or attaining employment if they left school before A-levels.

When given some additional background on the types of careers which could be undertaken in sales/marketing or exporting, again students mentioned people skills, being able to manage and give orders, and being able to multi-task, however no students were able to give any more specific details.

None of the students participated in a language subject, they gave reasons such as, it was too difficult, they didn’t like the teachers which took languages and it was not something they intended to use. Having also spoken to one of their teachers he explained that students in this school were generally very against language subjects. He explained that lack of confidence was a big issue, with the risk of speaking in front of the class in another language and being made fun of was very likely, and more common than in other subjects. Most students stated that when choosing subjects it was primarily about taking something they enjoyed or that would give them the greatest options later on. 8 out of the 10 students were taking ICT.

Additionally, travelling was not something that students appeared to have thought much about before now. Of those that had, they said they would prefer to have a couple of years of work experience in Northern Ireland before attempting to work abroad.

When asked about who influences them in relation to careers, students said that although they spoke to their parents about their subjects, they had little influence on what they actually chose. They careers teachers had the biggest influence. Students had a one on one discussion with their careers adviser once a week. Students also stated that there was a careers adviser from DEL (Department for Employment and Learning) who visited the school every week and they could arrange to speak to them at any time. Again, students stated that careers discussions focused on their school subjects and how they were doing in their subjects. Student had not been to any careers fairs but had been told that they could attend college open days in the coming months.

APPENDIX 6: Support Programmes

Table : Programmes Available to Support Companies

| **Programme** | **Programme Details** | **Provider / Funder and Numbers** | **Funding Available** | **Assessment Against Needs** |
| --- | --- | --- | --- | --- |
| Management / Leadership Network/ Programme | The programme provides:   * First Line Managers Survival Kits; * Developing Middle Managers; * Performance Management/ Skills Utilisation; * Sales & Account Management; * Management Skills for Technical Professionals; * Lean Management; * Project Management; * Growth Fundamentals / Export Skills; * Risk Management; and * Strategic Leadership for Owners/ Directors. * Sales Leadership | DEL. During 2012/13, 13 SME’s have availed of the Sales and Account Management intervention, and 5 SME’s have availed of the Turning Point Sales Leadership intervention  . | 50% grant available for eligible NI-based micro businesses, SMEs and Social Economy Enterprises (maximum cost of £3,000 per participant). | DEL have recently reviewed and realigned the Management and Leadership Development Programme (MLDP) and there is intention to make this DELs primary vehicle for supporting management development. There is an Export Leadership Skills intervention under the Growth Fundamentals heading and also two offerings under the Sales and Account Management banner (Sales, Business Development and Account Management and, secondly, Turning Point Sales Leadership). |
| Business Improvement Training Programme (now developed into the Skills Growth Programme and the Skills Accelerator Grant) | This is a programme for assisting companies improve competitiveness and performance through workforce training. | Invest NI  50 BITP cases over the past two years. | Of the £14.138m proposed company expense on training, £443.9k (3%) was for sales/marketing/CRM type activities. Language training accounted for only £590 or 0.0042% of total proposed spend. | This can help companies meet upskilling needs as the programme tailors workshops to the employer’s needs. |
| Key Worker Grant | This grant offers financial aid to key workers. | Invest NI | Maximum £25,000. | Support to appoint key managers- such as those who are sales, marketing or export managers. |
| Export Development Service | The Export Development Service (EDS) provides specialists to work with Invest NI clients on a 1-1 basis to assist them to grow business in export markets. | Invest NI, delivered by external consultants, 2011/12: 82 companies,  2012/13: 96 companies.  Average of 89 per year | / | This is specific to exporting and therefore meets companies’ needs in developed workforce skills needed for exporting. |
| Propel | This programme is targeted at entrepreneurs that have “the potential to become a significant exporter and employer”. It is delivered in two phases:  -A one month series of workshops to help the entrepreneur develop their business idea; and  -The “second phase runs over ten months and involves workshop training, financial support, mentor support, networking opportunities and visits to other markets. | Invest NI  77 companies as of 2011[[17]](#footnote-18) | Companies can avail of salary support funding. | This involves a large focus on export potential, however, as it is aimed at entrepreneurs, it is unlikely there is much workforce development, i.e. skills development is likely to be on an individual level. This shows there is a route for start-up companies |
| Going South Africa | Going South Africa is a programme that was created to encourage and help businesses in Northern Ireland break into the emerging market in South Africa. The programme provides advisors that offer knowledge of the market and help pinpoint potential clients. | Invest NI  10 companies in 2011/2012[[18]](#footnote-19) | / | This programme is export specific, however it is more advice orientated rather than training or upskilling. |
| Going Dutch | This programme offers businesses practical experience through an experienced marketing organisation that has a range of marketing consultants and contacts to provide support and information. | Invest NI  33 companies in 2011/2012[[19]](#footnote-20) | / | As with Going South Africa, this programme is export specific, however it is more advice orientated rather than training or upskilling. However, the practical experience may provide new skills, especially in relation to cultural awareness. |
| Trade Missions | These are international trips made by businesses that are organised for the purpose of exploring international business opportunities. | InterTradeIreland  94 InterTradeIreland companies in 2011/2012 | / | Trade Missions are not upskilling supports, but does provide some practical experience that could provide some skills such as increased cultural awareness (through visiting the country and advice). |
| Export Skills and Knowledge Workshops | One day workshops which cover:  Market research;  Developing an export market plan  Sales prospecting and networking  Sales communications  Managing distribution channels  Tendering; and  Key account management.  These are available to all export-focused businesses in Northern Ireland. | Invest NI. | Each workshop costs £75 (Inc. VAT) per person. Included in the cost is an optional half- day extended personal workshop session with the consultant trainer (one session per company). | Specific workshops to aid companies that are already exporting or have a focus on exporting. |
| Linkubator Export Leadership Programme | This programme assists SMEs in developing and implementing an export plan.  It consists of 5 half-day workshop modules:  Module 1. Export Selling Leadership  Module 2. International Partners  Module 3. Understanding the International Buyer  Module 4. Managing International Sales  Module 5. International Negotiation  Participants also gain one to one mentoring between modules. | DEL – delivered by Linkubator. 53 SME’s have availed of the service during 2012/13, 30 of which had fewer than 10 employees. | Up to £7000 per year for SME’s from DEL through Management Leadership Development Programme[[20]](#footnote-21) | This programme is export specific and provides companies with a pathway to getting involved in exporting. It does not, however, provide any practical experience, although those delivering the programme are experienced in exporting. |
| ABC’s of Selling Seminars | These are a series of half day seminars which are designed to help companies defy the economic downturn by offering some practical steps on how to improve their selling skills and increase sales. The seminars look at the elements involved in creating an effective sales strategy and managing your sales force. Participants are signposted to other Invest NI services. | Invest NI | No Cost to companies | This programme is aimed at developing sales skills within companies, which can be directly applied in an exporting context. |
| Selling Skills and Sales Related Workshops | These are targeted at both senior and operational staff and the focus in on the sales process and the strategies and skills required to win business.  The workshops are hosted by a team of specialist trainers with practical export experience and are open to all export focused companies (including non-Invest NI companies) from any sector involved in manufacturing or tradable service. | Invest NI | Cost to companies of £75 + VAT per person. | This programme is aimed at developing sales skills within companies, which can be directly applied in an exporting context. |
| Skills Diagnostic Toolkit | “Skills diagnostics” are available for companies, aimed at evaluating the impact of training and development in sales, marketing and leadership within companies. The “skills diagnostic toolkit” offers evaluations from £50 per user for marketing, to £350 per user for sales skills. These evaluations are intended to demonstrate the impact of prior training and development within companies, and also to highlight areas of need for future training. | CIM | Cost of between £50 and £350 per user. | These programmes are aimed at showcasing the skills shortcomings amongst companies for sales and marketing . |
| International Selling Programme | This is an Enterprise Ireland initiative and is promoted as a “Gold Standard” programme designed to help Irish and Northern Irish exporters strengthen their positions in international markets. It is targeted at CEOs, company directors or high level management. The programme comprises eight two-day modules over a ten month period (January to October) and is delivered by the Dublin Institute of Technology (DIT) in conjunction with a panel of sales and management experts.  Each module is accompanied by practical, company specific assignments and from this participants develop a sales plan aligned to their company’s international business strategy. | Enterprise Ireland | €12,989 per participant, Grants available to Enterprise Ireland client companies. (70% grants for SME’s and 50% for large companies) | This programme relates directly to the development of international selling. |

Table : Programmes Available from District Councils

| Programme Title | Programme Details | Target No  of Companies | Dates | Funding |
| --- | --- | --- | --- | --- |
| SEED Export Development Programme  (Banbridge District Council on behalf of the SEED Consortium) | This programme is led by Banbridge Council and it provides Export Development Skill Workshops and mentoring to help SMEs “develop and deliver interregional economic development initiatives focusing on areas of targeted need within the region”. | 20 (14 per wave have participated so far) | October 2011 – December 2013 (Wave 1)  January 2013 – December 2014 (Wave 2) | £95,900 (Invest NI / ERDF: £71,925, SEED councils: £23,975) |
| SW SME Export Development Programme  (Dungannon and South Tyrone Borough Council) | This Programme is delivered through a combination of workshops, one to one mentoring support (up to four days), marketing and promotional support to assist participating companies to achieve their export objectives. Participants may also be supported to visit trade shows and exhibitions. | 105 | 2011-2012,  2012-2013,  2013-2014 | £391,400 |
| Atlanta Trade Development Programme  (Lisburn City Council and Castlereagh Borough Council) | This programme includes workshops and business mentoring | 6 (annually) | Was due to commence 2010, 2011 | £30,206.52 |
| GoCanada | This programme is funded partly by Lisburn City council and primarily by Invest NI. Workshops, coaching and training on doing business in Canada provided by experienced business advisors and support in preparation for a successful market visit. The programme functions as a pilot and is currently undergoing evaluation (as of April 2013) to determine the future | 12 | 2013 | £95,000 (Lisburn City Council - ~£15,000, Invest NI, ~£80,000) |
| International Competitiveness Programme  (Lisburn City Council) | This programme includes workshops and mentoring to help companies export to Netherlands and Central/ Eastern Europe. | 12 (annually) (6 Netherlands and 6 Central & Eastern Europe) | Commenced September 2012 | £204,000 |
| Exploring Exporting Programme (Belfast City Council) [[21]](#footnote-22) | It includes two key stages:  Stage 1   * Export workshops: Four workshops delivered by experienced coaches that are exporting. At the workshops, business can meet successful first time exporters. * Individual business mentoring: Businesses are allocated an experienced business mentor. * Pre-export action plan: Support to develop a pre-export action plan. * Signposting: Additional sources of support for your exporting activity provided.   Stage 2   * Individual business mentoring: Mentoring to help research and plan for an export market visit. * Export market visit: An export market visit that will include a minimum of five pre-arranged meetings with potential new customers. * Export Action Plan: Includes the development of an export plan to help businesses develop new markets for the first time. | 10 businesses with less than 20 employees that have no experience in trading outside of Northern Ireland. | In progress; at time of writing, Belfast City Council was tendering for the delivery of the programme. | Free programme. For businesses that participate in in stage 2, subsidies are available:   * 50% of flight costs to overseas market (to a maximum of £500); and * 50% of accommodation costs (maximum 5 nights at £100 per night).   The programme is funded by Belfast City Council and the European Regional Development Fund under the European Sustainable Competitiveness Programme for Northern Ireland 2007-2013. |
| Cookstown Business Elevate Programme | This programme offers SME’s in the Cookstown district the opportunity to avail of export consultancy support in the following areas:   * New or modified product / process / service introduction or development * Financial management * Sales/marketing * Effective pricing * Developing Business Plans * Implementing quality standards * Information, Communication, Technology * Human resource management   Companies must have been trading for 6 months and not be in receipt of similar support to be eligible for the programme. | Not stated. | From May 2013 | The programme is subsidised by Cookstown District Council to the extent that companies pay approximately £70 to participate. |

APPENDIX 7: CIM Courses

Table : CIM Courses

| Course | | Target Participants | | Details of Course |
| --- | --- | --- | --- | --- |
| Marketing | | | | |
| CIM Professional Certificate in Marketing | Junior marketers, working in a support role or people that conduct marketing as part of their job. | | Participants learn:  The function and fundamentals of marketing, including how to write and execute a marketing plan;  Ways of understanding and communicating with customers;  Understanding of their organisation’s marketing environment; and  Application of practical knowledge, e.g. collecting and analysing of data and marketing budgets. | |
| CIM Professional Diploma in Marketing | Marketers in (or working toward) operational, supervisory or management roles. | | Participants learn:  The marketing planning process, including how to evaluate and implement it in a range of marketing contexts and environments;  How to develop and manage a brand and product portfolio ;  To recommend how marketing functions and how these should be structured; and  To identify the information needs of their organisation, the research required and the resources needed to support it. | |
| ITSMA Professional Diploma in Marketing for Business Services & Solutions | Individuals in the business to business environment, looking to build on existing skills. | | Within the context of business to business services and solutions marketing, participants learn to:  Manage and use marketing research and information, plan activity, and measure the results;  Write a marketing plan at the operational level, conduct a marketing audit, and measure success;  Understand marketing communications and how all parts of the promotional mix work together;  Effectively manage marketing activities and learn how marketing integrates with other functions; and  Understand and apply the key principles of service and solutions marketing. | |
| CIM Chartered Postgraduate Diploma in Marketing | Marketers working at (or working towards) a strategic level. Also for those looking to build on CIM Professional Diploma level. | | Participants learn to:  Make the transition into strategic marketing management;  Work more cross functionally at a senior management level;  How to make a contribution to the organisation's strategy and contribute to board decisions; and  Ways of demonstrating leadership and influence. | |

| Digital Marketing | | |
| --- | --- | --- |
| CAM Diploma in Digital Marketing | Anyone who needs to develop digital marketing plans. | Participants learn:  How to understand tools and the link between marketing and communications, in both its traditional and digital forms, and key stages in digital development;  How to communicate digital communications tools;  Key factors involved with the implementation, measurement and evaluation of successful digital marketing campaigns;  Ways to respond to changing behaviours and expectations through an understanding of the emerging buyer behaviour and the importance of target marketing for an online consumer; and  How to apply relevant tools and concepts to design, measure and monitor and annual online marketing plan. |
| CAM Diploma in Mobile Marketing | Those already working marketing, looking to develop specialist skills in the digital and mobile arenas. | Participants learn:  To refine thinking and planning abilities by understanding the link between marketing and communications, in both its traditional and digital forms, and key stages in digital development;  The definition, legalities, practicalities and evolution of mobile marketing;  How to effectively develop, monitor and evaluate a mobile marketing plan, considering both paid and un-paid mobile marketing opportunities;  Practical ways to apply and integrate marketing opportunities and digital tactics creatively into your existing marketing activities;  How to design and develop a marketing concept using a mobile application;  Understand and utilise the latest trends in the mobile marketplace and how these are integrated into your wider marketing environment; and  Assess the reasons why mobile devices are used and the resulting impact on marketing and communications activities. |
| CAM Diploma in Digital Metrics and Analytics | Anyone in small, medium or large organisations responsible for the measurement and use of digital and social media marketing channels. | Participants learn:  To refine thinking and planning abilities by understanding the tools and the link between marketing and communications, in both its traditional and digital forms, and key stages in digital development;  How to communicate using the tools of the digital communications mix;  Practical ways to assess a range of digital marketing research methodologies and techniques;  How to analyse the effectiveness of digital marketing and social media activities; and  The tools required to measure and evaluate the return on investment through understanding Key Performance Indicators (KPIs). |
| CAM Diploma in Digital Media and Branding | Agencies or clients. | Participants learn:  To refine thinking and planning abilities by understanding the tools and the link between marketing and communications, in both its traditional and digital forms, and key stages in digital development.  How to communicate using the tools of the digital communications mix;  How to evaluate the importance of integrating diverse media in communications, analysing the challenges faced through on- and offline media;  An understanding of the developing role that social media and networks play in communication;  How to appraise evolving technologies, including mobile devices and converging technologies; and  Practical ways to employ an integrated approach to creating, sustaining and promoting a brand and applying key performance indicators in Integrated Marketing Communications. |
| CAM Diploma in Digital Campaign Planning | Anyone, who wants a better understanding of how to plan and implement digital campaigns. | Participants learn:  To refine thinking and planning abilities by understanding the tools and the link between marketing and communications, in both its traditional and digital forms, and key stages in digital development;  How to communicate using the tools of the digital communications mix;  How to plan and execute digital campaigns using available and imminent digital approaches;  The skills and knowledge required to understand the challenges and opportunities presented by advances in digital communications techniques;  Ways to apply the tools available to measure the effectiveness of digital campaigns and recommend appropriate methods and solutions to a given situation;  How social acceptability, the law and voluntary constraints can control and constrain digital communications; and  An understanding of the future trends and direction of digital communications. |

| Sales | | |
| --- | --- | --- |
| Certificate in Professional Sales Practice | Anyone starting a career in sales, or those who need a refresher. | Attendees learn:  The process: obtaining and analysing market information; making recommendations on new product development; matching products and services to markets and market conditions; preparing a sales presentation; identifying customer needs; presenting benefits to meet customer needs and overcoming objections; and gaining commitment to sales actions and agreeing terms and conditions;  The skills: performing a personal skills audit; preparing a personal development plan, including setting personal objectives and identifying strategies for achievement; effective time management; developing and maintaining a network of contacts; delivering professional presentations and evaluating them; and developing, submitting and following-up customer proposals; and  The customer: how to proactively interact with customers, influencers and decision makers; understanding legal, ethical and regulatory requirements; resolving customer complaints; gathering, evaluating and taking appropriate action on customer feedback; and cross-selling and up-selling. |
| Advanced Certificate in Professional Sales Management Practice | Sales or account managers working at an operational level, those moving into a sales management or an account management position and experienced professionals who want to formalise their practical experience in the sales/business environment. | Attendees learn:  • Managing people: understanding the characteristics of a successful sales force; using recruitment basics; maintaining team motivation; successful training and development; and developing integrated internal relationships;  • Customer focus: organising resources effectively, with the objective of maintaining seamless customer relations, including information, systems and skills; and  • Planning: developing, implementing and presenting high impact sales plans. |
| Advanced Certificate in Professional Account Management Practice | Sales or account managers working at an operational level, those moving into a sales management or an account management position and experienced professionals who want to formalise their practical experience in the sales/business environment. | Attendees learn:  Account relationships: understand and utilise the practical aspects of creating and developing successful relationships with account customers; delivering memorable and powerful presentations; and building effective networks;  Customer focus: organising resources effectively, with the objective of maintaining seamless customer and account relations, including information, systems and skills; and  Account planning: developing, implementing and presenting high impact account plans. |
| Intensive Diploma in Strategic Sales Practice | Commercially experienced sales practitioners with at least five years sales experience, or current or potential sales directors. | Attendees learn:  Strategy and plans: understanding and utilising the practical aspects of creating and developing successful relationships with account customers; delivering memorable and powerful presentations; and building effective networks;  Customer focus: organising resources effectively, with the objective of maintaining seamless customer and account relations, including information, systems and skills; and  Account planning: developing, implementing and presenting high impact account plans. |
| Source: <http://www.cimacademy.co.uk> | | |

APPENDIX 8: WORKING FUTURES DATA

For the following tables, the “estimated proportion” takes into account the SOC 2010 4-digit codes which most accurately pertain to export support skills such as sales and marketing. These proportions have been arrived at through analysis of the data in the 2011 Labour Force Survey, assessing the proportion of relevant 4 digit codes in each sub-major group used in the Working Futures model. We have then translated this proportion into the sub-major groups used in Working Futures for Northern Ireland to gain a realistic picture of the current and projected jobs in the “export supporting” footprint. We must assume that the sub-major groups relevant to this footprint are similarly comprised in Northern Ireland[[22]](#footnote-23) in terms of the proportion of sales, marketing and other export-support skills. We have assessed the potential proportion of export roles in the sub major groups[[23]](#footnote-24) to be as follows:

* Corporate managers and directors:
* 1132 Marketing and sales directors: (9.19%)[[24]](#footnote-25);
* 1161 Managers and directors in transport and distribution (4.17%);
* 1115 Chief executives and senior officials (3.73%).
* Business and Public Service related professionals:
* 3536 Importers and exporters (0.52%);
* 354 Sales, Marketing and Related Associate Professionals (44.17%).
* Sales Occupations:
* 7113 Telephone salespersons (2.77%);
* 7129 Sales related occupations n.e.c.4 (3.42%);
* 7130 Sales supervisors (10.64%).
* Customer Service Occupations:
* 7211 Call and contact centre occupations (19.8%);
* 7213 Telephonists (2.77%);
* 7214 Communication operators (6.28%);
* 7215 Market research interviewers (3.33%).

The proportions of the sub-major groups which relate to possible export-supporting roles are therefore as follows:

* Corporate managers and directors: 17.09%
* Business and Public Service related professionals: 44.69%
* Sales Occupations: 16.83%
* Customer Service Occupations: 32.18%

Agriculture - Food and Live Animals and animal & vegetable oils, fats & waxes

**Table 17: Projected numbers in relevant occupations in agriculture**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 1176 | 1125 | 1063 | 1035 | 1002 | 968 | 927 | 887 | 844 | 804 | 765 |
| Adjusted proportion of Corporate Managers and Directors | 201 | 192 | 182 | 177 | 171 | 165 | 158 | 152 | 144 | 137 | 131 |
| Business and Public Service related professionals | 1353 | 1299 | 1238 | 1205 | 1165 | 1127 | 1092 | 1059 | 1024 | 992 | 961 |
| Adjusted proportion of Business and Public Service related professionals | 605 | 581 | 553 | 539 | 521 | 504 | 488 | 473 | 458 | 443 | 429 |
| Sales occupations | 232 | 220 | 208 | 198 | 189 | 180 | 171 | 163 | 155 | 148 | 140 |
| Adjusted proportion of Sales occupations | 39 | 37 | 35 | 33 | 32 | 30 | 29 | 27 | 26 | 25 | 24 |
| Customer service occupations | 93 | 90 | 86 | 84 | 82 | 79 | 76 | 72 | 69 | 66 | 63 |
| Adjusted proportion of Customer service occupations | 30 | 29 | 28 | 27 | 26 | 25 | 24 | 23 | 22 | 21 | 20 |
| Total Occupations | 2854 | 2734 | 2595 | 2522 | 2438 | 2354 | 2266 | 2181 | 2092 | 2010 | 1929 |
| Adjusted Total | 875 | 839 | 798 | 776 | 750 | 725 | 700 | 675 | 650 | 627 | 604 |

Food Products

Table : Projected numbers in relevant occupations in food products

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 972 | 980 | 989 | 1005 | 1021 | 1039 | 1077 | 1113 | 1147 | 1180 | 1212 |
| Adjusted proportion of Corporate Managers and Directors | 166 | 167 | 169 | 172 | 174 | 178 | 184 | 190 | 196 | 202 | 207 |
| Business and Public Service related professional | 991 | 1008 | 1027 | 1053 | 1080 | 1108 | 1147 | 1183 | 1216 | 1249 | 1280 |
| Adjusted proportion of Business and Public Service related professionals | 443 | 450 | 459 | 471 | 483 | 495 | 513 | 529 | 543 | 558 | 572 |
| Sales occupations | 313 | 308 | 303 | 305 | 306 | 307 | 307 | 306 | 304 | 303 | 300 |
| Adjusted proportion of Sales occupations | 53 | 52 | 51 | 51 | 51 | 52 | 52 | 51 | 51 | 51 | 50 |
| Customer service occupations | 192 | 197 | 202 | 207 | 213 | 218 | 224 | 230 | 234 | 239 | 244 |
| Adjusted proportion of Customer service occupations | 62 | 63 | 65 | 67 | 69 | 70 | 72 | 74 | 75 | 77 | 79 |
| Total | 2468 | 2493 | 2521 | 2570 | 2620 | 2672 | 2755 | 2832 | 2468 | 2493 | 2521 |
| Adjusted Total | 723 | 733 | 744 | 760 | 777 | 795 | 820 | 844 | 866 | 888 | 908 |

Beverages and Tobacco

Table : Projected numbers in relevant occupations in beverages and tobacco

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 141 | 142 | 145 | 149 | 153 | 158 | 162 | 165 | 168 | 171 | 173 |
| Adjusted proportion of Corporate Managers and Directors | 24 | 24 | 25 | 25 | 26 | 27 | 28 | 28 | 29 | 29 | 30 |
| Business and Public Service related professionals | 179 | 182 | 185 | 190 | 195 | 201 | 205 | 209 | 214 | 218 | 221 |
| Adjusted proportion of Business and Public Service related professionals | 80 | 81 | 83 | 85 | 87 | 90 | 92 | 93 | 96 | 97 | 99 |
| Sales occupations | 44 | 43 | 44 | 44 | 44 | 44 | 44 | 44 | 44 | 44 | 44 |
| Adjusted proportion of Sales occupations | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 |
| Customer service occupations | 29 | 30 | 31 | 31 | 32 | 33 | 34 | 34 | 35 | 35 | 35 |
| Adjusted proportion of Customer service occupations | 9 | 10 | 10 | 10 | 10 | 11 | 11 | 11 | 11 | 11 | 11 |
| Total | 393 | 397 | 405 | 414 | 424 | 436 | 445 | 452 | 393 | 397 | 405 |
| **Adjusted Total** | **121** | **122** | **125** | **128** | **131** | **135** | **138** | **140** | **143** | **145** | **147** |

Mineral Fuels, Lubricants and Related - Other Mining (Other than coal, oil and gas)

Table : Projected numbers in relevant occupations in other mining

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 272 | 269 | 273 | 275 | 277 | 279 | 279 | 278 | 276 | 274 | 272 |
| Adjusted proportion of Corporate Managers and Directors | 46 | 46 | 47 | 47 | 47 | 48 | 48 | 48 | 47 | 47 | 46 |
| Business and Public Service related professionals | 147 | 144 | 145 | 145 | 145 | 145 | 145 | 144 | 143 | 141 | 140 |
| Adjusted proportion of Business and Public Service related professionals | 66 | 64 | 65 | 65 | 65 | 65 | 65 | 64 | 64 | 63 | 63 |
| Sales occupations | 29 | 27 | 26 | 26 | 25 | 25 | 24 | 24 | 23 | 23 | 22 |
| Adjusted proportion of Sales occupations | 5 | 5 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| Customer service occupations | 29 | 29 | 30 | 30 | 30 | 30 | 30 | 30 | 30 | 30 | 30 |
| Adjusted proportion of Customer service occupations | 9 | 9 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| Total | 477 | 469 | 474 | 476 | 477 | 479 | 478 | 476 | 477 | 469 | 474 |
| **Adjusted Total** | **126** | **124** | **125** | **126** | **126** | **126** | **126** | **126** | **125** | **123** | **122** |

Chemicals & related products - Chemicals etc.

**Table 21: Projected numbers in relevant occupations in chemicals etc.**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 165 | 173 | 183 | 194 | 205 | 221 | 231 | 242 | 253 | 265 | 277 |
| Adjusted proportion of Corporate Managers and Directors | 28 | 30 | 31 | 33 | 35 | 38 | 39 | 41 | 43 | 45 | 47 |
| Business and Public Service related professionals | 122 | 128 | 136 | 145 | 153 | 167 | 176 | 185 | 194 | 204 | 214 |
| Adjusted proportion of Business and Public Service related professionals | 55 | 57 | 61 | 65 | 68 | 75 | 79 | 83 | 87 | 91 | 96 |
| Sales occupations | 34 | 33 | 32 | 33 | 33 | 38 | 38 | 38 | 39 | 40 | 40 |
| Adjusted proportion of Sales occupations | 6 | 6 | 5 | 6 | 6 | 6 | 6 | 6 | 7 | 7 | 7 |
| Customer service occupations | 48 | 51 | 55 | 59 | 62 | 69 | 72 | 76 | 79 | 83 | 87 |
| Adjusted proportion of Customer service occupations | 15 | 16 | 18 | 19 | 20 | 22 | 23 | 24 | 25 | 27 | 28 |
| Total | 369 | 385 | 406 | 431 | 453 | 495 | 517 | 541 | 369 | 385 | 406 |
| **Adjusted Total** | **104** | **109** | **115** | **122** | **129** | **141** | **148** | **155** | **162** | **170** | **178** |

Pharmaceuticals

**Table 22: Projected numbers in relevant occupations in pharmaceuticals**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 142 | 152 | 160 | 166 | 173 | 178 | 182 | 186 | 190 | 195 | 199 |
| Adjusted proportion of Corporate Managers and Directors | 24 | 26 | 27 | 28 | 30 | 30 | 31 | 32 | 32 | 33 | 34 |
| Business and Public Service related professionals | 156 | 167 | 175 | 200 | 210 | 218 | 225 | 232 | 240 | 247 | 255 |
| Adjusted proportion of Business and Public Service related professionals | 70 | 75 | 78 | 89 | 94 | 97 | 101 | 104 | 107 | 110 | 114 |
| Sales occupations | 19 | 20 | 21 | 23 | 24 | 25 | 25 | 26 | 26 | 27 | 27 |
| Adjusted proportion of Sales occupations | 3 | 3 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 5 | 5 |
| Customer service occupations | 33 | 36 | 38 | 42 | 45 | 47 | 49 | 50 | 52 | 54 | 56 |
| Adjusted proportion of Customer service occupations | 11 | 12 | 12 | 14 | 14 | 15 | 16 | 16 | 17 | 17 | 18 |
| Total | 350 | 375 | 394 | 431 | 452 | 468 | 481 | 494 | 350 | 375 | 394 |
| **Adjusted Total** | **108** | **116** | **121** | **135** | **142** | **147** | **152** | **156** | **161** | **166** | **171** |

Manufactured goods classified chiefly by material - Textiles

**Table 23: Projected numbers in relevant occupations in textiles**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 357 | 368 | 374 | 378 | 384 | 392 | 391 | 390 | 390 | 388 | 389 |
| Adjusted proportion of Corporate Managers and Directors | 61 | 63 | 64 | 65 | 66 | 67 | 67 | 67 | 67 | 66 | 66 |
| Business and Public Service related professionals | 200 | 205 | 208 | 210 | 212 | 215 | 213 | 211 | 210 | 210 | 209 |
| Adjusted proportion of Business and Public Service related professionals | 89 | 92 | 93 | 94 | 95 | 96 | 95 | 94 | 94 | 94 | 93 |
| Sales occupations | 59 | 59 | 59 | 58 | 58 | 57 | 55 | 54 | 53 | 54 | 53 |
| Adjusted proportion of Sales occupations | 10 | 10 | 10 | 10 | 10 | 10 | 9 | 9 | 9 | 9 | 9 |
| Customer service occupations | 28 | 29 | 30 | 31 | 32 | 32 | 32 | 32 | 32 | 33 | 33 |
| Adjusted proportion of Customer service occupations | 9 | 9 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 11 | 11 |
| Total | 644 | 661 | 671 | 677 | 686 | 696 | 691 | 687 | 644 | 661 | 671 |
| **Adjusted Total** | **169** | **174** | **176** | **178** | **180** | **183** | **182** | **180** | **180** | **180** | **179** |

Wood and Cork

**Table 24: Projected numbers in relevant occupations in wood and cork**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 218 | 221 | 227 | 230 | 232 | 229 | 225 | 220 | 216 | 213 | 212 |
| Adjusted proportion of Corporate Managers and Directors | 37 | 38 | 39 | 39 | 40 | 39 | 38 | 38 | 37 | 36 | 36 |
| Business and Public Service related professionals | 196 | 201 | 209 | 214 | 217 | 217 | 214 | 211 | 208 | 207 | 208 |
| Adjusted proportion of Business and Public Service related professionals | 88 | 90 | 93 | 96 | 97 | 97 | 96 | 94 | 93 | 93 | 93 |
| Sales occupations | 37 | 37 | 37 | 37 | 36 | 35 | 34 | 32 | 31 | 30 | 30 |
| Adjusted proportion of Sales occupations | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 5 | 5 | 5 | 5 |
| Customer service occupations | 22 | 23 | 23 | 24 | 24 | 23 | 23 | 22 | 21 | 21 | 21 |
| Adjusted proportion of Customer service occupations | 7 | 7 | 7 | 8 | 8 | 7 | 7 | 7 | 7 | 7 | 7 |
| Total | 473 | 482 | 496 | 505 | 509 | 504 | 496 | 485 | 473 | 482 | 496 |
| **Adjusted Total** | **138** | **141** | **146** | **149** | **150** | **149** | **147** | **144** | **142** | **141** | **141** |

Paper etc.

**Table 25: Projected numbers in relevant occupations in paper etc.**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 80 | 84 | 90 | 94 | 97 | 100 | 103 | 109 | 115 | 121 | 126 |
| Adjusted proportion of Corporate Managers and Directors | 14 | 14 | 15 | 16 | 17 | 17 | 18 | 19 | 20 | 21 | 22 |
| Business and Public Service related professionals | 62 | 64 | 68 | 71 | 73 | 75 | 77 | 81 | 86 | 90 | 93 |
| Adjusted proportion of Business and Public Service related professionals | 28 | 29 | 30 | 32 | 33 | 34 | 34 | 36 | 38 | 40 | 42 |
| Sales occupations | 27 | 27 | 28 | 29 | 29 | 29 | 30 | 31 | 32 | 33 | 34 |
| Adjusted proportion of Sales occupations | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 6 | 6 |
| Customer service occupations | 25 | 26 | 28 | 28 | 29 | 29 | 29 | 30 | 31 | 32 | 33 |
| Adjusted proportion of Customer service occupations | 8 | 8 | 9 | 9 | 9 | 9 | 9 | 10 | 10 | 10 | 11 |
| Total | 194 | 201 | 214 | 222 | 228 | 233 | 239 | 251 | 194 | 201 | 214 |
| **Adjusted Total** | **54** | **56** | **59** | **62** | **63** | **65** | **66** | **70** | **73** | **77** | **79** |

Rubber and Plastic

**Table 26: Projected numbers in relevant occupations in rubber and plastic**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 477 | 516 | 521 | 525 | 528 | 532 | 538 | 542 | 546 | 548 | 553 |
| Adjusted proportion of Corporate Managers and Directors | 82 | 88 | 89 | 90 | 90 | 91 | 92 | 93 | 93 | 94 | 95 |
| Business and Public Service related professionals | 366 | 394 | 397 | 398 | 400 | 402 | 404 | 406 | 408 | 408 | 411 |
| Adjusted proportion of Business and Public Service related professionals | 164 | 176 | 177 | 178 | 179 | 180 | 181 | 181 | 182 | 182 | 184 |
| Sales occupations | 187 | 197 | 195 | 190 | 185 | 181 | 178 | 175 | 171 | 167 | 164 |
| Adjusted proportion of Sales occupations | 31 | 33 | 33 | 32 | 31 | 30 | 30 | 29 | 29 | 28 | 28 |
| Customer service occupations | 82 | 89 | 89 | 89 | 88 | 88 | 88 | 87 | 87 | 87 | 86 |
| Adjusted proportion of Customer service occupations | 26 | 29 | 29 | 29 | 28 | 28 | 28 | 28 | 28 | 28 | 28 |
| Total | 1112 | 1196 | 1202 | 1202 | 1201 | 1203 | 1208 | 1210 | 1112 | 1196 | 1202 |
| **Adjusted Total** | **303** | **326** | **328** | **328** | **328** | **329** | **331** | **332** | **332** | **332** | **333** |

Other non-metallic

**Table 27: Projected numbers in relevant occupations in other non-metallic**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 528 | 503 | 486 | 473 | 462 | 458 | 468 | 477 | 482 | 480 | 473 |
| Adjusted proportion of Corporate Managers and Directors | 90 | 86 | 83 | 81 | 79 | 78 | 80 | 82 | 82 | 82 | 81 |
| Business and Public Service related professionals | 300 | 286 | 277 | 270 | 264 | 262 | 269 | 274 | 277 | 277 | 273 |
| Adjusted proportion of Business and Public Service related professionals | 134 | 128 | 124 | 121 | 118 | 117 | 120 | 122 | 124 | 124 | 122 |
| Sales occupations | 72 | 68 | 65 | 62 | 59 | 58 | 58 | 59 | 59 | 58 | 57 |
| Adjusted proportion of Sales occupations | 12 | 11 | 11 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| Customer service occupations | 67 | 64 | 62 | 60 | 59 | 58 | 59 | 60 | 60 | 60 | 59 |
| Adjusted proportion of Customer service occupations | 22 | 21 | 20 | 19 | 19 | 19 | 19 | 19 | 19 | 19 | 19 |
| Total | 967 | 921 | 890 | 865 | 844 | 836 | 854 | 870 | 967 | 921 | 890 |
| **Adjusted Total** | **258** | **246** | **238** | **231** | **226** | **224** | **229** | **233** | **235** | **235** | **231** |

Basic Metals

**Table 28: Projected numbers in relevant occupations in basic metals**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 194 | 195 | 199 | 193 | 192 | 192 | 194 | 196 | 198 | 200 | 203 |
| Adjusted proportion of Corporate Managers and Directors | 33 | 33 | 34 | 33 | 33 | 33 | 33 | 33 | 34 | 34 | 35 |
| Business and Public Service related professional | 103 | 106 | 111 | 108 | 108 | 108 | 109 | 111 | 112 | 113 | 115 |
| Adjusted proportion of Business and Public Service related professionals | 46 | 47 | 50 | 48 | 48 | 48 | 49 | 50 | 50 | 50 | 51 |
| Sales occupations | 18 | 18 | 18 | 17 | 17 | 16 | 16 | 16 | 16 | 16 | 16 |
| Adjusted proportion of Sales occupations | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Customer service occupations | 29 | 28 | 28 | 28 | 28 | 28 | 29 | 29 | 30 | 30 | 31 |
| Adjusted proportion of Customer service occupations | 9 | 9 | 9 | 9 | 9 | 9 | 9 | 9 | 10 | 10 | 10 |
| Total | 344 | 347 | 356 | 346 | 345 | 344 | 348 | 352 | 344 | 347 | 356 |
| **Adjusted Total** | **92** | **93** | **96** | **93** | **93** | **93** | **94** | **95** | **96** | **97** | **99** |

Machinery & transport equipment - Machinery N.E.C

**Table 29: Projected numbers in relevant occupations in machinery n.e.c**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 389 | 398 | 434 | 448 | 460 | 472 | 486 | 495 | 501 | 504 | 506 |
| Adjusted proportion of Corporate Managers and Directors | 66 | 68 | 74 | 77 | 79 | 81 | 83 | 85 | 86 | 86 | 86 |
| Business and Public Service related professionals | 263 | 268 | 291 | 298 | 304 | 311 | 318 | 323 | 325 | 326 | 326 |
| Adjusted proportion of Business and Public Service related professionals | 118 | 120 | 130 | 133 | 136 | 139 | 142 | 144 | 145 | 146 | 146 |
| Sales occupations | 63 | 63 | 67 | 67 | 66 | 67 | 67 | 67 | 66 | 65 | 63 |
| Adjusted proportion of Sales occupations | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 |
| Customer service occupations | 73 | 75 | 82 | 85 | 88 | 90 | 93 | 95 | 95 | 96 | 96 |
| Adjusted proportion of Customer service occupations | 23 | 24 | 26 | 27 | 28 | 29 | 30 | 31 | 31 | 31 | 31 |
| Total | 788 | 804 | 874 | 898 | 918 | 940 | 964 | 980 | 788 | 804 | 874 |
| **Adjusted Total** | **218** | **223** | **242** | **248** | **254** | **260** | **266** | **271** | **273** | **274** | **274** |

Motor Vehicles etc.

Table : Projected numbers in relevant occupations in motor vehicles etc.

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 132 | 139 | 130 | 133 | 138 | 141 | 144 | 147 | 151 | 155 | 158 |
| Adjusted proportion of Corporate Managers and Directors | 23 | 24 | 22 | 23 | 24 | 24 | 25 | 25 | 26 | 26 | 27 |
| Business and Public Service related professionals | 81 | 84 | 78 | 78 | 79 | 80 | 80 | 80 | 80 | 80 | 81 |
| Adjusted proportion of Business and Public Service related professionals | 36 | 38 | 35 | 35 | 35 | 36 | 36 | 36 | 36 | 36 | 36 |
| Sales occupations | 37 | 38 | 35 | 35 | 35 | 35 | 35 | 35 | 35 | 35 | 35 |
| Adjusted proportion of Sales occupations | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 |
| Customer service occupations | 21 | 21 | 19 | 19 | 19 | 19 | 19 | 18 | 18 | 18 | 18 |
| Adjusted proportion of Customer service occupations | 7 | 7 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 |
| Total | 271 | 282 | 262 | 265 | 271 | 275 | 278 | 280 | 284 | 288 | 292 |
| **Adjusted Total** | **72** | **74** | **69** | **70** | **71** | **72** | **72** | **73** | **73** | **74** | **75** |

Motor Vehicle Trade

**Table 31: Projected numbers in relevant occupations in motor vehicle trade**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 960 | 982 | 1009 | 1043 | 1070 | 1109 | 1143 | 1178 | 1215 | 1243 | 1278 |
| Adjusted proportion of Corporate Managers and Directors | 164 | 168 | 172 | 178 | 183 | 190 | 195 | 201 | 208 | 212 | 218 |
| Business and Public Service related professional | 655 | 666 | 683 | 703 | 720 | 743 | 763 | 784 | 803 | 820 | 841 |
| Adjusted proportion of Business and Public Service related professionals | 293 | 298 | 305 | 314 | 322 | 332 | 341 | 350 | 359 | 366 | 376 |
| Sales occupations | 2104 | 2143 | 2195 | 2238 | 2260 | 2304 | 2284 | 2260 | 2232 | 2202 | 2178 |
| Adjusted proportion of Sales occupations | 354 | 361 | 369 | 377 | 380 | 388 | 384 | 380 | 376 | 371 | 367 |
| Customer service occupations | 290 | 302 | 313 | 324 | 329 | 338 | 333 | 328 | 321 | 315 | 309 |
| Adjusted proportion of Customer service occupations | 93 | 97 | 101 | 104 | 106 | 109 | 107 | 106 | 103 | 101 | 99 |
| Total | 4009 | 4093 | 4200 | 4308 | 4379 | 4494 | 4523 | 4550 | 4009 | 4093 | 4200 |
| **Adjusted Total** | **904** | **923** | **948** | **973** | **991** | **1018** | **1028** | **1038** | **1045** | **1051** | **1060** |

Other Transport Equipment

**Table 32: Projected numbers in relevant occupations in other transport equipment**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 358 | 358 | 363 | 366 | 369 | 371 | 374 | 377 | 380 | 381 | 382 |
| Adjusted proportion of Corporate Managers and Directors | 61 | 61 | 62 | 63 | 63 | 63 | 64 | 64 | 65 | 65 | 65 |
| Business and Public Service related professional | 303 | 305 | 311 | 316 | 321 | 325 | 329 | 334 | 339 | 342 | 346 |
| Adjusted proportion of Business and Public Service related professionals | 135 | 136 | 139 | 141 | 143 | 145 | 147 | 149 | 151 | 153 | 155 |
| Sales occupations | 26 | 26 | 26 | 26 | 26 | 26 | 26 | 26 | 25 | 25 | 25 |
| Adjusted proportion of Sales occupations | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| Customer service occupations | 70 | 72 | 75 | 77 | 80 | 81 | 83 | 85 | 86 | 87 | 88 |
| Adjusted proportion of Customer service occupations | 23 | 23 | 24 | 25 | 26 | 26 | 27 | 27 | 28 | 28 | 28 |
| Total | 757 | 761 | 775 | 785 | 796 | 803 | 812 | 822 | 757 | 761 | 775 |
| **Adjusted Total** | **223** | **225** | **230** | **233** | **237** | **239** | **242** | **245** | **248** | **250** | **252** |

Miscellaneous manufactured articles - Electrical Equipment

**Table 33: Projected numbers in relevant occupations in electrical equipment**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 356 | 382 | 406 | 421 | 435 | 451 | 464 | 479 | 491 | 504 | 516 |
| Adjusted proportion of Corporate Managers and Directors | 61 | 65 | 69 | 72 | 74 | 77 | 79 | 82 | 84 | 86 | 88 |
| Business and Public Service related professional | 264 | 282 | 299 | 309 | 318 | 329 | 336 | 345 | 352 | 359 | 366 |
| Adjusted proportion of Business and Public Service related professionals | 118 | 126 | 134 | 138 | 142 | 147 | 150 | 154 | 157 | 160 | 164 |
| Sales occupations | 44 | 46 | 48 | 48 | 49 | 49 | 49 | 49 | 49 | 49 | 48 |
| Adjusted proportion of Sales occupations | 7 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 |
| Customer service occupations | 46 | 49 | 53 | 55 | 57 | 59 | 61 | 62 | 63 | 64 | 65 |
| Adjusted proportion of Customer service occupations | 15 | 16 | 17 | 18 | 18 | 19 | 20 | 20 | 20 | 21 | 21 |
| Total | 710 | 759 | 806 | 833 | 859 | 888 | 910 | 935 | 710 | 759 | 806 |
| **Adjusted Total** | **201** | **215** | **228** | **236** | **243** | **251** | **257** | **264** | **270** | **275** | **281** |

Other Manufacturing

**Table 34: Projected numbers in relevant occupations in other manufacturing**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 51 | 50 | 49 | 49 | 49 | 49 | 49 | 52 | 54 | 57 | 60 |
| Adjusted proportion of Corporate Managers and Directors | 9 | 9 | 8 | 8 | 8 | 8 | 8 | 9 | 9 | 10 | 10 |
| Business and Public Service related professional | 46 | 45 | 45 | 45 | 45 | 46 | 46 | 48 | 51 | 53 | 56 |
| Adjusted proportion of Business and Public Service related professionals | 21 | 20 | 20 | 20 | 20 | 21 | 21 | 21 | 23 | 24 | 25 |
| Sales occupations | 35 | 33 | 32 | 31 | 30 | 29 | 28 | 28 | 29 | 29 | 29 |
| Adjusted proportion of Sales occupations | 6 | 6 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| Customer service occupations | 28 | 28 | 30 | 31 | 32 | 33 | 34 | 35 | 37 | 38 | 39 |
| Adjusted proportion of Customer service occupations | 9 | 9 | 10 | 10 | 10 | 11 | 11 | 11 | 12 | 12 | 13 |
| Total | 160 | 156 | 156 | 156 | 156 | 157 | 157 | 163 | 160 | 156 | 156 |
| **Adjusted Total** | **44** | **43** | **44** | **44** | **44** | **44** | **45** | **46** | **49** | **51** | **53** |

Metal Products

**Table 35: Projected numbers in relevant occupations in metal products**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 444 | 453 | 450 | 436 | 433 | 431 | 426 | 421 | 423 | 425 | 427 |
| Adjusted proportion of Corporate Managers and Directors | 76 | 77 | 77 | 75 | 74 | 74 | 73 | 72 | 72 | 73 | 73 |
| Business and Public Service related professional | 337 | 351 | 357 | 354 | 359 | 365 | 366 | 367 | 367 | 368 | 368 |
| Adjusted proportion of Business and Public Service related professionals | 151 | 157 | 160 | 158 | 160 | 163 | 164 | 164 | 164 | 164 | 164 |
| Sales occupations | 40 | 41 | 41 | 39 | 39 | 38 | 37 | 37 | 36 | 36 | 35 |
| Adjusted proportion of Sales occupations | 7 | 7 | 7 | 7 | 7 | 6 | 6 | 6 | 6 | 6 | 6 |
| Customer service occupations | 50 | 53 | 54 | 54 | 55 | 55 | 55 | 55 | 55 | 55 | 55 |
| Adjusted proportion of Customer service occupations | 16 | 17 | 17 | 17 | 18 | 18 | 18 | 18 | 18 | 18 | 18 |
| Total | 871 | 898 | 902 | 883 | 886 | 889 | 884 | 880 | 871 | 898 | 902 |
| **Adjusted Total** | **249** | **258** | **261** | **257** | **259** | **261** | **260** | **260** | **260** | **261** | **261** |

Commodities/transactions Wearing Apparel

Table : Projected numbers in relevant occupations in wearing apparel

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 32 | 31 | 31 | 31 | 31 | 31 | 32 | 32 | 32 | 31 | 31 |
| Adjusted proportion of Corporate Managers and Directors | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| Business and Public Service related professionals | 28 | 28 | 27 | 27 | 27 | 27 | 27 | 27 | 26 | 26 | 25 |
| Adjusted proportion of Business and Public Service related professionals | 13 | 13 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 12 | 11 |
| Sales occupations | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 19 | 19 | 19 | 18 |
| Adjusted proportion of Sales occupations | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Customer service occupations | 14 | 14 | 14 | 13 | 13 | 13 | 13 | 13 | 13 | 12 | 12 |
| Adjusted proportion of Customer service occupations | 5 | 5 | 5 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| Total | 94 | 93 | 92 | 91 | 91 | 91 | 92 | 91 | 94 | 93 | 92 |
| **Adjusted Total** | **26** | **26** | **25** | **25** | **25** | **25** | **25** | **25** | **24** | **24** | **23** |

Furniture

Table : Projected numbers in relevant occupations in furniture

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 180 | 175 | 178 | 180 | 183 | 188 | 190 | 191 | 192 | 192 | 191 |
| Adjusted proportion of Corporate Managers and Directors | 31 | 30 | 30 | 31 | 31 | 32 | 32 | 33 | 33 | 33 | 33 |
| Business and Public Service related professional | 130 | 125 | 127 | 128 | 130 | 132 | 134 | 134 | 134 | 133 | 132 |
| Adjusted proportion of Business and Public Service related professionals | 58 | 56 | 57 | 57 | 58 | 59 | 60 | 60 | 60 | 59 | 59 |
| Sales occupations | 88 | 82 | 80 | 77 | 75 | 74 | 73 | 72 | 70 | 68 | 66 |
| Adjusted proportion of Sales occupations | 15 | 14 | 13 | 13 | 13 | 12 | 12 | 12 | 12 | 11 | 11 |
| Customer service occupations | 41 | 40 | 40 | 40 | 41 | 41 | 41 | 41 | 41 | 41 | 40 |
| Adjusted proportion of Customer service occupations | 13 | 13 | 13 | 13 | 13 | 13 | 13 | 13 | 13 | 13 | 13 |
| Total | 439 | 422 | 425 | 425 | 429 | 435 | 438 | 438 | 439 | 422 | 425 |
| **Adjusted Total** | **117** | **112** | **114** | **114** | **115** | **117** | **118** | **118** | **118** | **117** | **116** |

Retail Trade

**Table38: Projected numbers in relevant occupations in retail trade**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 7474 | 7815 | 8276 | 8664 | 8985 | 9293 | 9440 | 9597 | 9778 | 9958 | 10092 |
| Adjusted proportion of Corporate Managers and Directors | 1277 | 1336 | 1414 | 1481 | 1536 | 1588 | 1613 | 1640 | 1671 | 1702 | 1725 |
| Business and Public Service related professionals | 5290 | 5502 | 5805 | 6047 | 6247 | 6441 | 6578 | 6725 | 6883 | 7040 | 7173 |
| Adjusted proportion of Business and Public Service related professionals | 2364 | 2459 | 2594 | 2702 | 2792 | 2878 | 2940 | 3005 | 3076 | 3146 | 3206 |
| Sales occupations | 43667 | 42369 | 41425 | 40874 | 40147 | 39313 | 39278 | 39293 | 39359 | 39456 | 39345 |
| Adjusted proportion of Sales occupations | 7349 | 7131 | 6972 | 6879 | 6757 | 6616 | 6610 | 6613 | 6624 | 6640 | 6622 |
| Customer service occupations | 4521 | 4725 | 4984 | 5152 | 5282 | 5400 | 5527 | 5664 | 5808 | 5954 | 6061 |
| Adjusted proportion of Customer service occupations | 1455 | 1521 | 1604 | 1658 | 1700 | 1738 | 1779 | 1823 | 1869 | 1916 | 1950 |
| Total | 60952 | 60411 | 60490 | 60737 | 60661 | 60447 | 60823 | 61279 | 60952 | 60411 | 60490 |
| **Adjusted Total** | **12445** | **12446** | **12584** | **12720** | **12784** | **12821** | **12942** | **13081** | **13240** | **13404** | **13503** |

Wholesale Trade

**Table 39: Projected numbers in relevant occupations in wholesale trade**

|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Corporate managers and directors | 4304 | 4290 | 4348 | 4441 | 4547 | 4626 | 4749 | 4855 | 4946 | 5046 | 5171 |
| Adjusted proportion of Corporate Managers and Directors | 736 | 733 | 743 | 759 | 777 | 791 | 812 | 830 | 845 | 862 | 884 |
| Business and Public Service related professionals | 3389 | 3396 | 3478 | 3592 | 3728 | 3846 | 3986 | 4117 | 4234 | 4348 | 4490 |
| Adjusted proportion of Business and Public Service related professionals | 1515 | 1518 | 1554 | 1605 | 1666 | 1719 | 1781 | 1840 | 1892 | 1943 | 2007 |
| Sales occupations | 2051 | 2046 | 2084 | 2118 | 2160 | 2190 | 2214 | 2234 | 2248 | 2260 | 2280 |
| Adjusted proportion of Sales occupations | 345 | 344 | 351 | 356 | 364 | 369 | 373 | 376 | 378 | 380 | 384 |
| Customer service occupations | 654 | 667 | 693 | 723 | 757 | 789 | 822 | 853 | 883 | 910 | 942 |
| Adjusted proportion of Customer service occupations | 210 | 215 | 223 | 233 | 244 | 254 | 265 | 274 | 284 | 293 | 303 |
| Total | 10398 | 10399 | 10603 | 10874 | 11192 | 11451 | 11771 | 10398 | 10399 | 10603 | 10874 |
| **Adjusted Total** | **2806** | **2810** | **2871** | **2953** | **3050** | **3132** | **3230** | **3320** | **3400** | **3479** | **3577** |

1. 2 respondents skipped this question. [↑](#footnote-ref-2)
2. i.e. staff that have the learned ability to identify market opportunities and to develop/ implement strategies to deliver on these opportunities. [↑](#footnote-ref-3)
3. Note the small number of responses means the data should be interpreted with caution. [↑](#footnote-ref-4)
4. Five respondents failed to provide an answer for this question [↑](#footnote-ref-5)
5. Five respondents failed to provide an answer for this question [↑](#footnote-ref-6)
6. Five respondents failed to provide an answer for this question [↑](#footnote-ref-7)
7. Seven respondents failed to provide an answer for this question; eight respondents failed to provide an answer for the entry level / middle management element of the question [↑](#footnote-ref-8)
8. This respondent stated that they had 40 staff at this level [↑](#footnote-ref-9)
9. This respondent stated they had 7 staff at this level [↑](#footnote-ref-10)
10. Nine respondents failed to provide an answer to this question [↑](#footnote-ref-11)
11. Nine respondents failed to provide an answer to this question [↑](#footnote-ref-12)
12. Seven respondents failed to provide an answer to this question [↑](#footnote-ref-13)
13. Seven respondents failed to provide an answer to this question [↑](#footnote-ref-14)
14. i.e. knowledge of appropriate business etiquette and protocol for the market. [↑](#footnote-ref-15)
15. Data represents all companies exporting to multiple destinations [↑](#footnote-ref-16)
16. The respondents were given the opportunity to provide more than one answer [↑](#footnote-ref-17)
17. Propel Programme Interim Evaluation – Final, March 2012, Cogent. [↑](#footnote-ref-18)
18. From Invest NI database provided to RSM McClure Watters 2012. [↑](#footnote-ref-19)
19. From Invest NI database provided to RSM McClure Watters 2012. [↑](#footnote-ref-20)
20. See previous entry in Table 8.1 [↑](#footnote-ref-21)
21. http://www.belfastcity.gov.uk/businessprogrammes/exploringexportingprogamme.asp [↑](#footnote-ref-22)
22. Available data for N.I. is neither robust nor widely available at this level of disaggregation in LFS [↑](#footnote-ref-23)
23. Based on the proportions in the 2011 Labour Force Survey [↑](#footnote-ref-24)
24. The bracketed numbers show the approximate proportion of the 3-digit or 4-digit code of the total number of roles in the sub-major group. [↑](#footnote-ref-25)