

1. INTRODUCTION

This report represents the findings of an in-depth evaluation of the Scottish Enterprise Market Advantage Programme, operated by Scottish Enterprise Tayside.

The Market Advantage Programme (MAP) involves a series of skills development workshops and best practice visits designed to positively benefit both individual participants, and their businesses, in the Scottish food & drink sector. SAC Aberdeen has managed the Programme since July 1998.

The key objectives of this research are, therefore, to evaluate the extent to which both individuals and businesses in the sector have benefited from their participation since 1998, whether the Programme represents good value for money and provide recommendations on the future continuance, design, delivery and direction of the Programme.

The research, contained in this evaluation report, has been undertaken by Scottish Economic Research based at the Dundee Business School, University of Abertay. The research took place during the period June-September 2003.

2. BACKGROUND

The Market Advantage Programme is a SE Network-wide programme of activities designed to enhance marketing and commercial knowledge in the food and drink sector. The Programme has been operating since July 1998.

SE Tayside has managed the Programme since January 2001, on behalf of the SE Network. Prior to 2001 the Programme was managed centrally by Scottish Enterprise. The Programme of workshops and best practice visits (BPVs), has been operated, under a management contract, by SAC Aberdeen.

A series of regular workshops and BPVs have been available to food and drink sector businesses and other appropriate organisations on a range of topics at various locations across the SE Network areas.

The skill development workshops are designed to fit within the larger marketing and commercial development support programme offered by Scottish Food & Drink. The workshops are designed to cover the key issues of relevance to the day-to-day lives of Scottish food and drink companies. The BPVs are available to highlight to delegates how particular processes work and to look at marketing and development activities in action.

3. AIMS & OBJECTIVES

This section includes a brief statement of the understanding and interpretation of the purpose of the specific objectives of the work. The aims of the research are outlined in the original study brief. In the following these aims and objectives are repeated together with our understanding and interpretation of them.

Objective 1

To evaluate the overall effectiveness of the MAP and of the Workshops and Best Practice Visits

This represents the key study objective. Assessment of MAP effectiveness involves a quantitative and qualitative assessment of the net additional impacts of the Programme on the performance of the participating businesses (elicited through business surveys) set against the resource inputs associated with Programme delivery. This assessment will be based on current SEN output monitoring and evaluation best practice approaches.

The effectiveness of the Workshops and Best Practice Visits will feed into the overall Programme assessment but will also be considered as specific Programme activities. The assessment of Workshop and Best Practice Visits will be based on existing monitoring results collected and analysed by SAC, the Managing Agent, and further information elicited through a delegate survey designed to gather delegate feedback in terms of:

- Benefits in relation to skills, knowledge and performance
- Extent to which additional skills and knowledge gained have been implemented in the workplace
- The extent to which workshops met delegate objectives

We intend to introduce an element of best practice customer satisfaction evaluation contained in the British Standards Institute publication PAS 46. This details best practice approaches to surveying levels of customer/ employee satisfaction and loyalty.

Objective 2

To evaluate the future relevance of past Workshop topics and to recommend relevant topics for 2004/5 and demonstrate strategic alignment (i.e. with Smart, Successful Scotland, SEN's Priority Targets and specific strategic objectives relevant to Scottish Food and Drink

In order to evaluate the future relevance of past Workshop topics we will utilise five key sources of information:

- Delegates
- Delegate businesses
- Strategic documents

- Stakeholder interviews
- Non-participating businesses

Utilisation of these five sources of information will provide views from all those involved/potentially involved in the MAP. An analysis of this qualitative data will highlight any demand for Workshop topics and Best Practice Visits, whether repetitions of previous activities or new inclusions.

Objective 3

To measure the impact of Workshops on delegate performance and on the performance of their businesses

The MAP can have two direct impacts - one will be on the individual participants themselves and the other on their businesses. Eliciting feedback from both delegates and their businesses (as outlined for Objective 1 above and detailed in the Study Methodology) and analysis of their responses will permit evaluation of both the individual and business impacts. Impacts on participants could involve a wide range of factors such as: enhanced loyalty towards their employer, enhanced skills, enhanced employment/ promotion/ earning opportunities; and a range of psychological impacts such as "well-being" and enhanced motivation. From the business perspectives the range of impacts may involve improved HRM systems, staff retention and turnover improvements, reduced internal skill gaps, increased sales/ exports, cost savings, improved supplier/ customer relations; networking benefits and collaborations, enhanced marketing effectiveness; increased employment, productivity and profitability. The delegate and business surveys will be designed to elicit the full range of potentially significant impacts of the Programme.

Objective 4

To examine previous Workshop delivery mechanisms and to make recommendations for the future

Understanding & Interpretation

The delivery of Workshops and Best Practice Visits in terms of locations, timings, length, number of participants, quality of training delivery and other relevant variables are likely to have a significant impact on past satisfaction levels and future participation. This information can then feed into our recommendations for future design and delivery of the key MAP elements.

Objective 5

To analyse future funding options for the Workshops

In economic terms the role of SEN and SET is to address aspects of market failure and, once eliminated, to withdraw from the market place. The future operation of the MAP may involve a range of funding options ranging from 100% public funding to 100%

commercial operation. The views of all stakeholders involved in MAP will be examined in order to direct recommendations for future funding options. The key aspect to addressing this question is whether or not a market exists for a private sector organisation to provide the Workshops i.e. are the businesses willing-to-pay? In addition, does a suitable commercial organisation exist to meet that demand?

4. DATA & METHODOLOGY

Study Methodology

This section outlines the methodology and timetable for the work. The methodology is based on a range of information collection methods, the results of which provide the basis for evaluation to meet the specific objectives of this analysis. The study methodology will involve the following activities:

Data/ Information Capture

- Scoping/ Key Stakeholder Interviews
- Document Review (e.g. strategy documents, monitoring reports)
- Survey Sample Selection
- Participating Business Surveys
- Non-Participating Business Surveys
- Delegate Surveys

Analysis of Data/ Information

- Analysis of quantitative survey responses
- Analysis of stakeholder interviews and qualitative survey responses

Evaluation

- Assessment of Strategic Consistency
- Review of Inputs, Targets, Outputs and Objectives
- Assessment of Net Additional Impacts
- Cost effectiveness Calculation
- Value for Money Assessment
- Assessment of Future Programme Direction
- Identification of Good Practice

Scoping/ Key Stakeholder Interviews

Past experience of undertaking evaluation work indicates that it is critical to undertake initial meetings with the key stakeholders involved. This not only helps to provide practical information to be used in survey sample design, but also helps to provide the key areas of focus for the study and highlights potential avenues of investigation and benchmarking issues. The first task will therefore involve undertaking initial meetings with key partner organisations to determine factors such as:

- the relevant policy/ strategic context of the MAP
- the key issues for focus in the evaluation study
- the availability of monitoring, baseline, benchmarking and other existing information which can inform the study
- the range of programme activities, inputs and client lists (including contact details)

- attitudes and perceptions of MAP performance and future design and delivery

Face-to-face interviews were held with the Programme management team at SAC Aberdeen, representatives of Scottish Food & Drink and SE Tayside. The views of other potential interest groups were also sought although they declined the opportunity to be involved.

Document Review

Linked to the scoping/ stakeholder interviews are the review of documentation on the Programme itself (such as the original, and subsequent strategy documents, monitoring reports and any specific event evaluation questionnaire results that may be available).

Survey Sample Selection

In order to meet the study objectives three distinct survey questionnaires were administered by SER. The survey type, target population and response rate are shown in Table 4.1.

Table 4.1 Sample Populations & Response Rates

	Target Population	Response Rate
Delegate Survey	316	20%
Participating Business Survey	120	23%
Non-Participating Business Survey	150	13%

The response rates in Table 4.1 are relatively low – we would normally expect around a 33% response rate to business surveys. However, there are two plausible explanations for the low response. Firstly, we took the target population of delegates and participating businesses over the entire life of the MAP. In other words, we were surveying delegates and businesses that may have been involved as far back as 1998. Clearly this near 5 year time span is likely to reduce response rates as delegates move on or businesses close/ merge and so on. In addition, as we have attempted to survey non-participants we would almost always expect a lower response rate as they see no/ little benefit in responding to a questionnaire on a Programme in which they have not been involved and may have taken a decision not to do so.

With these response rates in mind, however, we feel that the results are reasonably reliable and can form the basis for rational, informed, decision-making on the future of the MAP.

Delegate Survey

A postal survey aimed at Workshop/Best Practice Visit delegates involved a questionnaire designed to elicit the views of participants on aspects including:

- Benefits in relation to skills, knowledge and performance
- Extent to which additional skills and knowledge gained have been implemented in the workplace
- The extent to which workshops met delegate objectives
- Views on value to their business
- Impact on their personal/ career development
- Impact on their attitudes to employer/ sector
- Views on future participation, design and delivery issues

Participating Business Survey

A postal survey aimed at the senior manager of participating businesses was administered by SER. This survey involved a questionnaire designed to elicit the effects of the MAP on business performance. The questionnaire was designed to collect information on the following:

- Business Characteristics: sub-sector, size, location etc.
- Involvement with the MAP: number of staff involved, workshops/ best practice visits attended
- Impact of MAP: on internal systems, employees, external relations and networking, sales, productivity, exports, skill gaps, profits etc.
- Perceptions of MAP: views on design and delivery, views on future options, funding etc.

In the questionnaire design we have utilised best practice survey techniques, based on the adaptation of British Standard PAS 46 on customer loyalty and satisfaction monitoring (see Exhibit 1)

<p>EXHIBIT 1 KEY CUSTOMER SURVEY QUESTIONS</p> <p>1. Based on your experience over the past six months, how satisfied are you with XYZ Organization?</p>				
Very satisfied	Somewhat satisfied	Neither Satisfied nor dissatisfied	Somewhat dissatisfied	Very dissatisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>2. Based on your overall experience, how likely would you be to continue to use XYZ Organization in the foreseeable future?</p>				
Definitely would	Probably would	Might or might not	Probably would not	Definitely would not
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>3. Based on your overall experience, how likely are you to recommend XYZ Organization to a friend or colleague?</p>				
Definitely would	Probably would	Might or might not	Probably would not	Definitely would not
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Source: BSI/Respond</p>				

Non-Participating Business Survey

A survey of Scottish food & drink businesses that have not, to date, been involved in the MAP was undertaken in order to elicit reasons for non-participation and potential future involvement. The sample was selected at random from the Scottish Food & Drink database provided by SAC Aberdeen.

Analysis of Survey Responses

Survey responses were collated and analysed utilising the SPSS statistical software. Quantitative responses (e.g. impact on sales) are aggregated to produce a total MAP impact. This figure will be grossed-up according to standard statistical protocols in order to account for any survey non-responses. Qualitative responses will, wherever possible, be classified to provide percentage response rates and/ or response rankings on an appropriate scale. Specific comments on issues such as the way forward or criticisms of the MAP will be listed when alternative analysis is not deemed possible.

Programme Evaluation

The previous elements of the study methodology will provide the information on the baseline situation and the current situation that will permit an assessment of the impact of the Programme on business performance over the appropriate evaluation period. In addition, we have been able to evaluate the contribution of the programme to key performance targets and objectives over the period.

5. Analysis of Results

Stakeholder Interviews

Key issues arising from stakeholder consultations are as follows:

- The MAP has tended to work in isolation from other Scottish Food & Drink activities and future MAP activities will have to be better co-ordinated with other SF&D services to business such as the Masterclass Programme. The MAP needs to become part of the "Team for Learning".
- There had been a concern that branding of MAP caused previous confusion among businesses but, with the introduction of centrally co-ordinated marketing materials this concern has reduced. In fact there is a feeling now that Market Advantage has developed a strong brand identity among client groups.
- There needs to be careful consideration of whether or not to run a specific event dependent on the number of delegates registered. A situation whereby workshops have run with very few delegates in the past should not continue. The break-even point needs to be assessed and an agreement reached on minimum delegate numbers. This should be linked to Programme target setting for delegate and business participation.
- The workshop topics and BPVs should be provided based on an understanding of "what the client group wants" as opposed to "what we think they want". This will involve market research by SF&D, SE Tayside and/or the programme managers (currently SAC Aberdeen). It is worth noting that the results of the current study provide some assessment of historical and potential future demand for specific workshop topics and BPVs.
- It is also important to note that, while in the initial year of operation, and prior to SE Tayside taking on the Project Management role, workshop topics were prescribed. Since then, however, client feedback has been collected and appropriate responses made based on that (e.g. plans to link workshops with BPVs in a single event).
- There is a need to establish a protocol designed to collate and disseminate information on the quality of speakers on the MAP.
- The supplier (SAC Aberdeen) needs to meet regularly with the Project Manager (SE Tayside) and co-ordinate fully with SF&D. for example, there is potential duplication between Masterclass topics and MAP workshops (e.g. Approaching the Retail Multiples is likely to be similar to Meet the Buyer)
- Flexibility of Programme activities is important (e.g. current key topics of interest) although delegates/ businesses need sufficient planning time.

- BPVs are proving increasingly popular and an optimal approach in future may involve a combined classroom-based presentation combined with a company visit as part of the same workshop event.

Demand & Satisfaction Levels

Tables 5.1 and 5.2 illustrate the levels of demand for, and satisfaction with, the individual skill development workshops and best practice visits.

Tables 5.1 and 5.2 show both public sector and private sector participation levels and a satisfaction rating based on the following:

Very satisfied =	+3
Somewhat satisfied =	+1
Indifferent =	0
Somewhat dissatisfied =	-1
Very dissatisfied =	-3

Table 5.2 suggests that the Best Practice Visits have proved reasonable popular with businesses - the satisfaction level results should, however, be treated with caution due to the relatively low response rates.

It is clear, however, that in all cases satisfaction ratings are positive. The highest ratings are 3's for both the Mackay's best practice visit (although this is based on a single response), followed by 2.25 for Key Account Management and 2's for a number of workshops as well as the other two best practice visits at Mackie's and Castle MacLellan Foods, as illustrated in Chart 5.3.

The overall average satisfaction rating for the skill development workshops and best practice visits is 1.63 – a positive rating given the possible range –3 to +3.

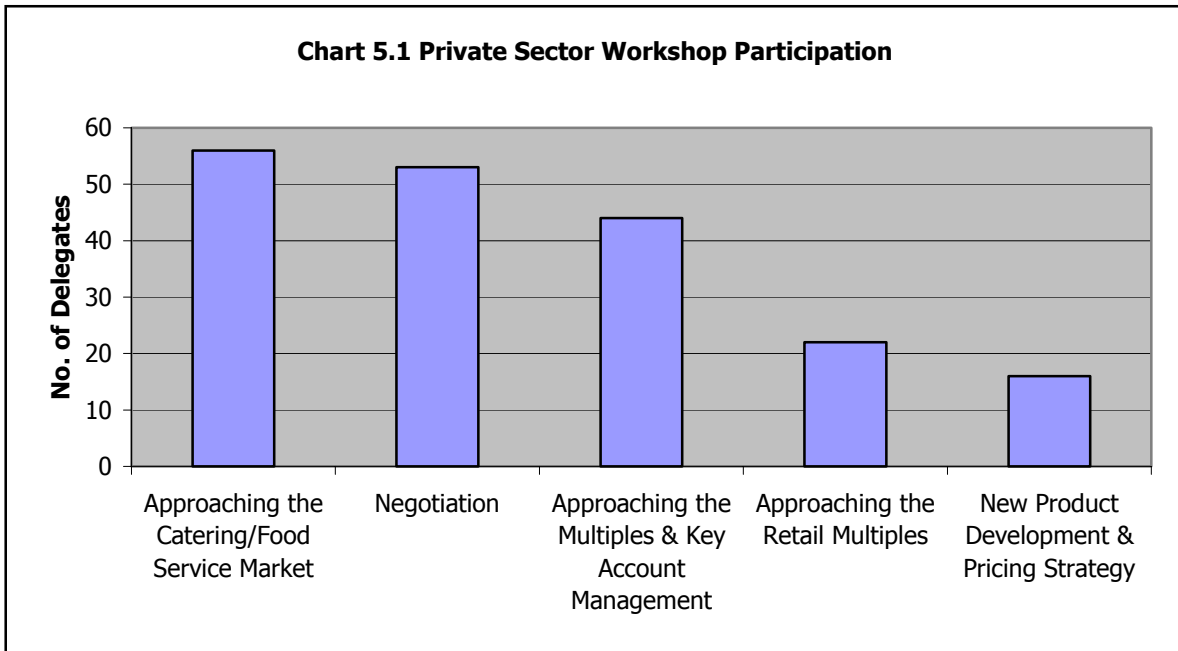
Table 5.1 Workshop Participation & Satisfaction Levels

	No. of Participants (Demand)		No of Responses	Average Response (Satisfaction Level)
	Private	Public		
Direct Marketing	13	4	6	2.00
Approaching the Multiples & Key Acc Mgt	44	8	9	1.78
Customer Service	6	4	2	1.00
Implementing Category Management & ECR	13	4	2	2.00
Market Research & Competitive Intelligence	5	2	4	1.25
Exhibition Skills & Marketing	9	6	4	1.50
Telemarketing	4	0	4	1.50
Advertising & Promotion	15	4	2	1.50
New Product Development & Pricing Strategy	16	1	7	2.00
Negotiation	53	18	8	1.00
Introduction to Category Mgmt	2	3	4	1.50
Approaching the Catering/ Foodservice Market	56	7	11	1.56
Approaching the Retail Multiples	15	4	6	2.00
Key Account Management	4	3	4	2.25
Introduction to ECR	22	4	1	0.00
Relationship Marketing	4	3	1	1.00
Sales Management for Profit	1	1	1	1.67
Knowing Your Consumer	3	5	2	2.00
Marketing Strategy for Small Businesses	4	4	1	0.00

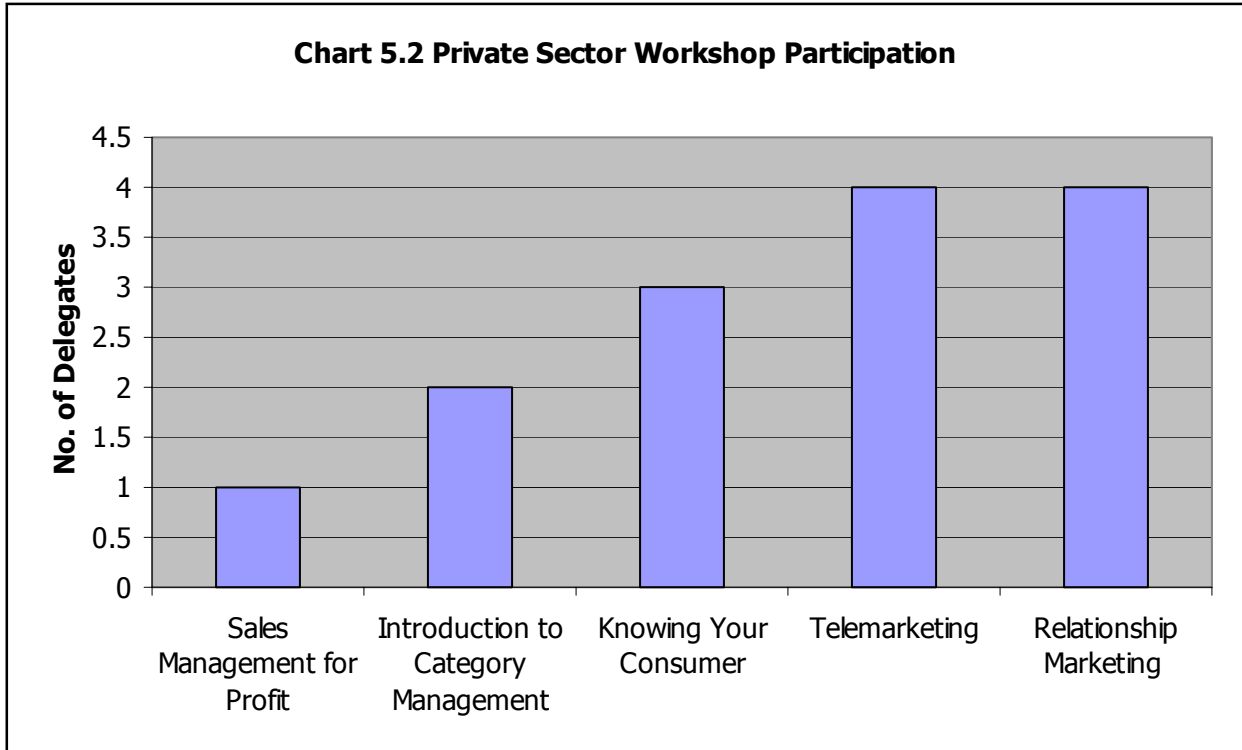
Table 5.2 Best Practice Visit Participation & Satisfaction Levels

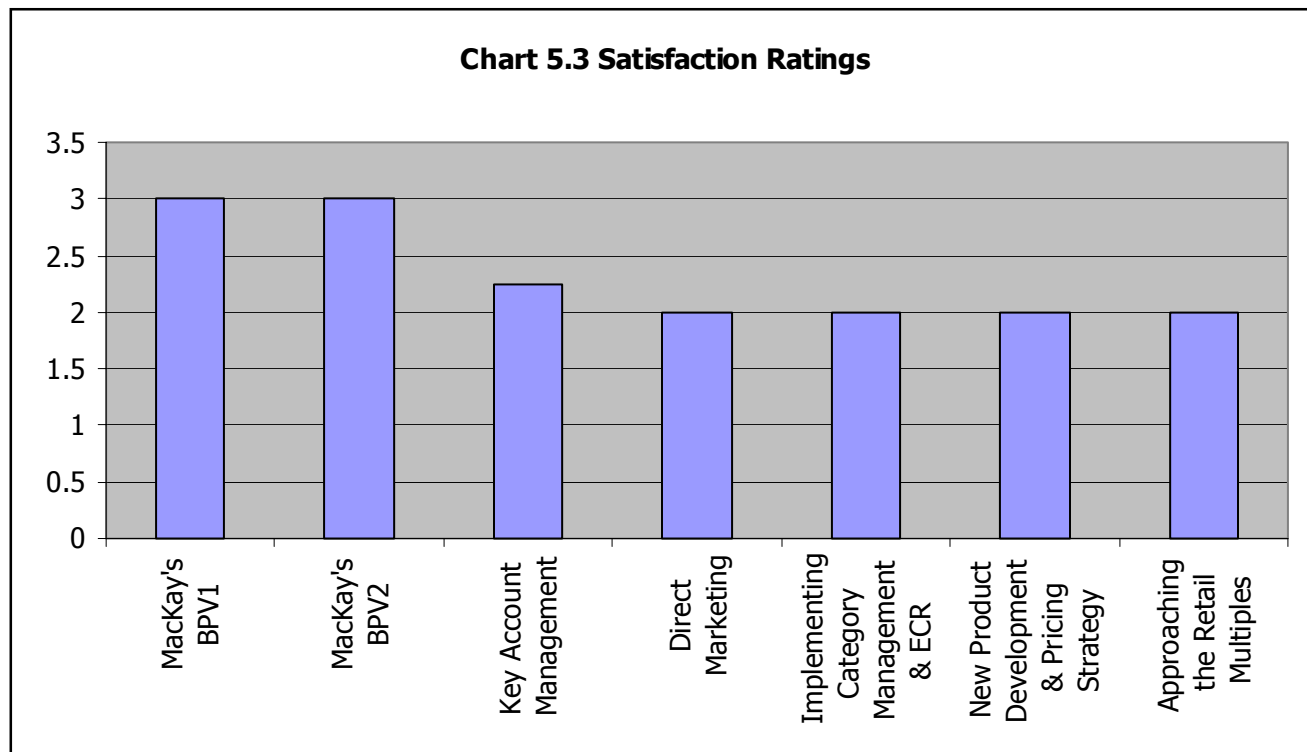
Mackay's (1999)	17	2	4	3.00
Mackay's (2002)	6	2	1	3.00
Mackie's	11	4	2	2.00
Castle MacLellan Foods	4	1	2	2.00

Chart 5.1 shows that the most popular workshop topics among businesses were Approaching the Catering/ Food Service Market (56) Negotiation (53) and Approaching the Multiples & Key Account Management (44). It is worth noting, however, that Approaching the Multiples and Approaching the Retail Multiples combined demand indicates that this may in fact be the single most popular workshop (66).



In contrast to the extremely popular workshops identified in Chart 5.1 there are some workshop topics that have experienced extremely low participation levels, as shown in Chart 5.2. The low private sector participation levels for a number of workshops such as Sales Management for Profit (1) and Telemarketing (4) indicate that there has been little demand for these workshop topics in the past. Given these low demand levels the cost-effectiveness and value for money of these workshops, on an individual basis is questionable.





In order to supplement the analysis of satisfaction ratings identified in Tables 5.1 and 5.2 and Chart 5.3 we have made use of the individual Post Workshop Evaluation Summaries provided by the SAC Aberdeen team for the 2001-2002 period and presented in Table 5.3.

Table 5.3 Post Workshop Evaluation Results

	VERY POOR	POOR	FAIR	GOOD	EXCELLENT
Exhibition Skills & Marketing				3	11
Implementing Category Management & ECR			1	9	8
Negotiation		2	3	2	5
Sales Management for Profit				1	
New Product Development & Pricing Strategy				2	4
Knowing Your Consumer				3	1
Approaching the Catering/ Foodservice Market			1	9	4
Marketing Strategy for Small Businesses				3	5
Market Research & Competitive Intelligence				2	4
Telemarketing				3	1
Advertising & Promotion			3	4	2
Mackay's BPVs				1	8
TOTAL	0	2	8	37	53

Source: SAC Aberdeen

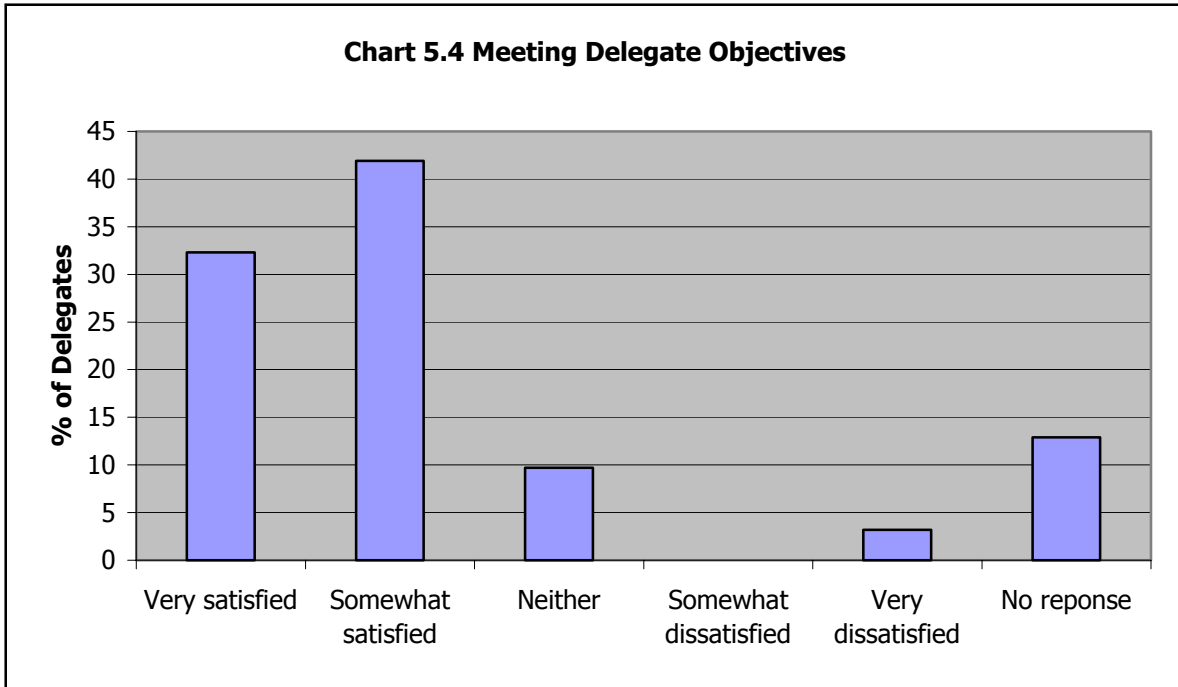
Table 5.3 illustrates that the overall assessment of workshops attended is very positive. In fact if we apply a similar scoring system to that used to calculate satisfaction levels in Table 5.1:

VERY POOR = -3
POOR = -1
FAIR = 0
GOOD = +1
EXCELLENT = +3

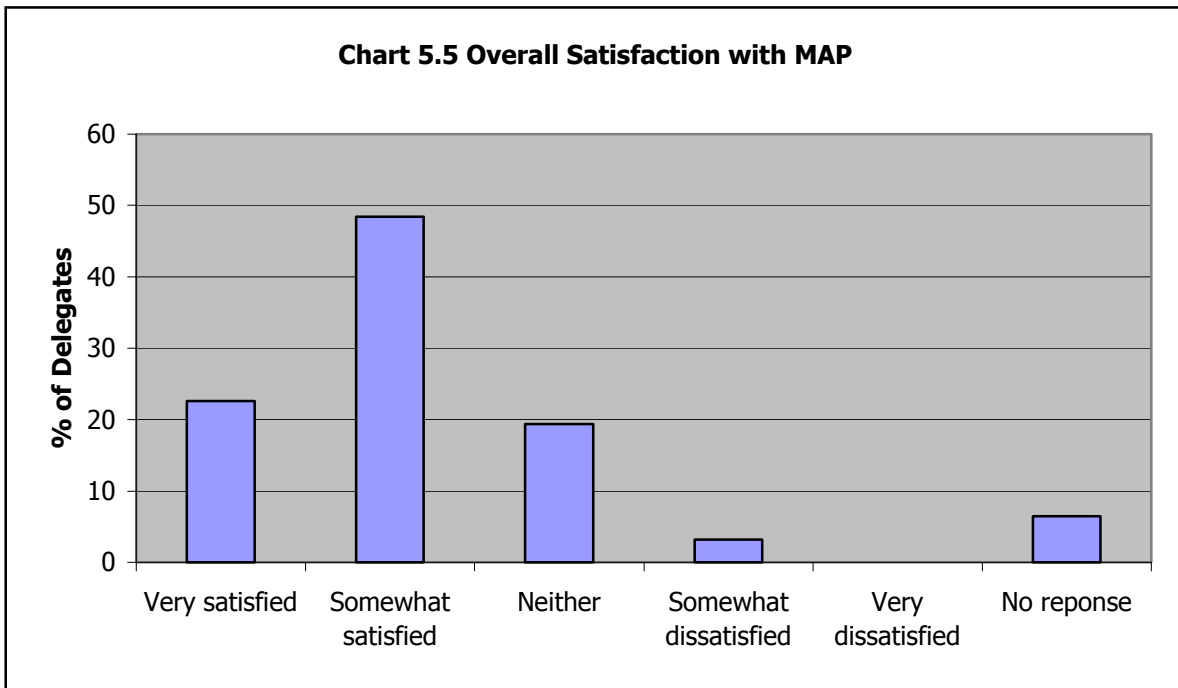
We have an overall average satisfaction rating of 1.94, which approximates the 1.63 average rating calculated from the SER survey results.

Impact on Individuals/ Delegates

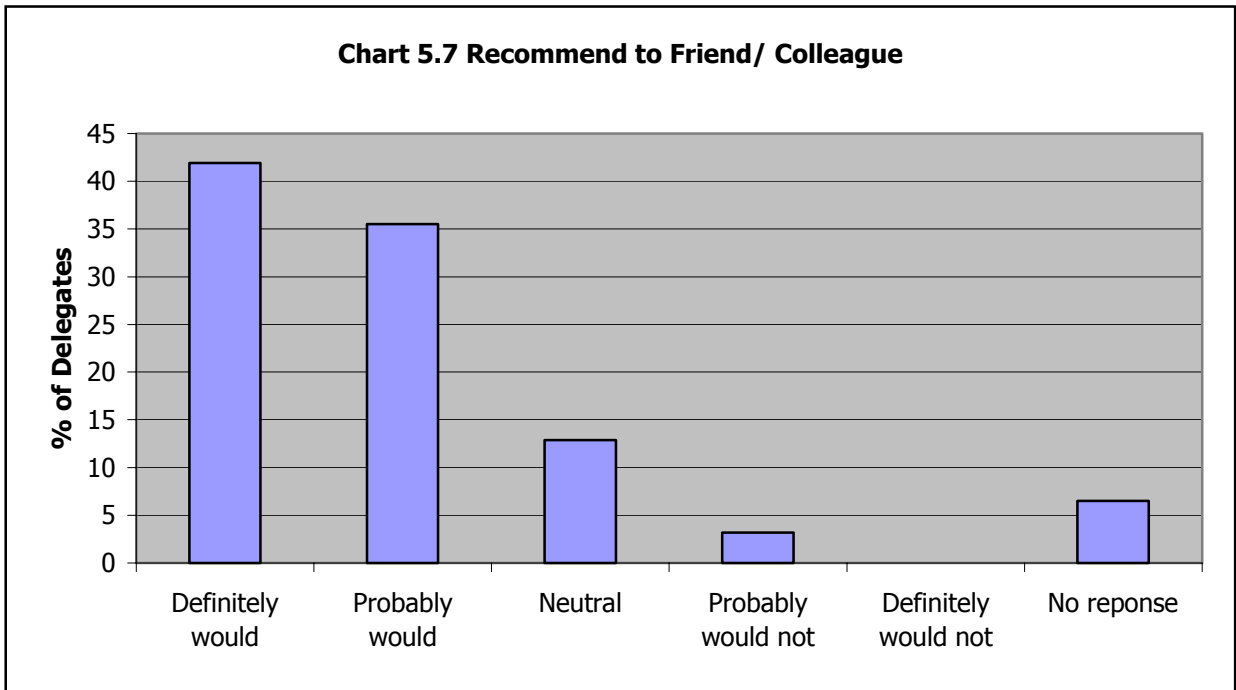
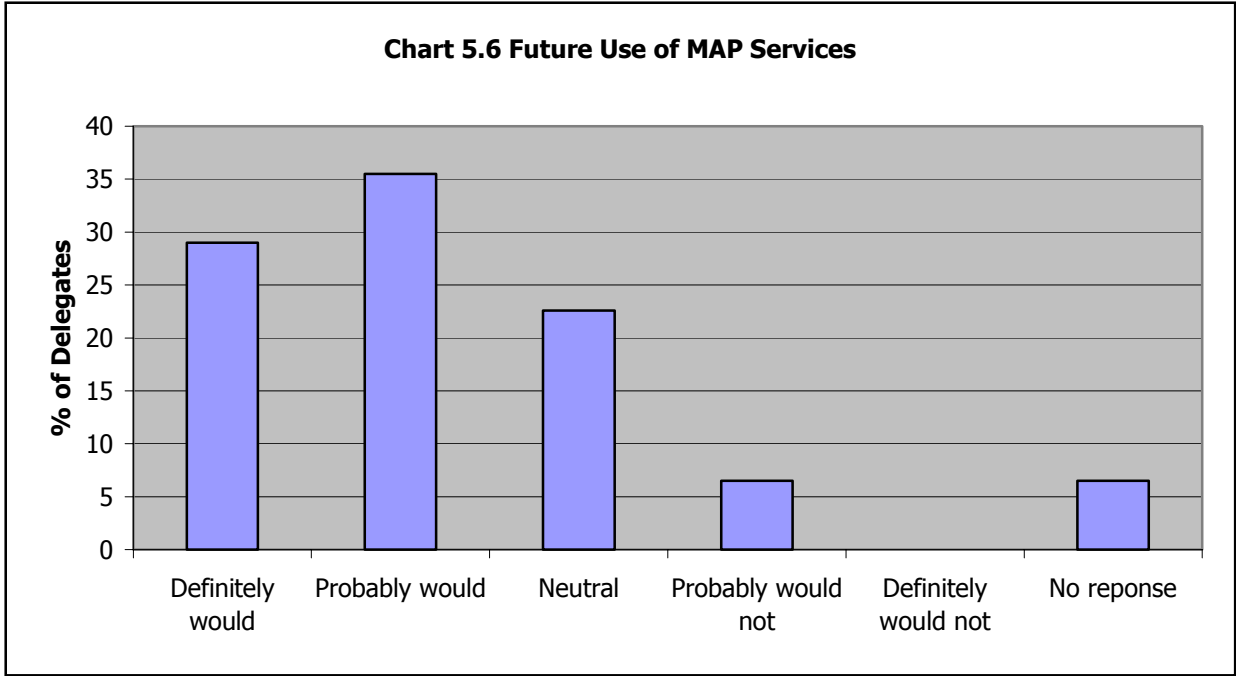
The following set of results are based on the Delegate Survey Questionnaire (Appendix A) designed to identify the impact of MAP participation on the delegates themselves.



74% of the respondents mentioned that the workshops/ best practice visits met their objectives at the either 'very satisfied' or 'somewhat satisfied' level (Chart 5.4).

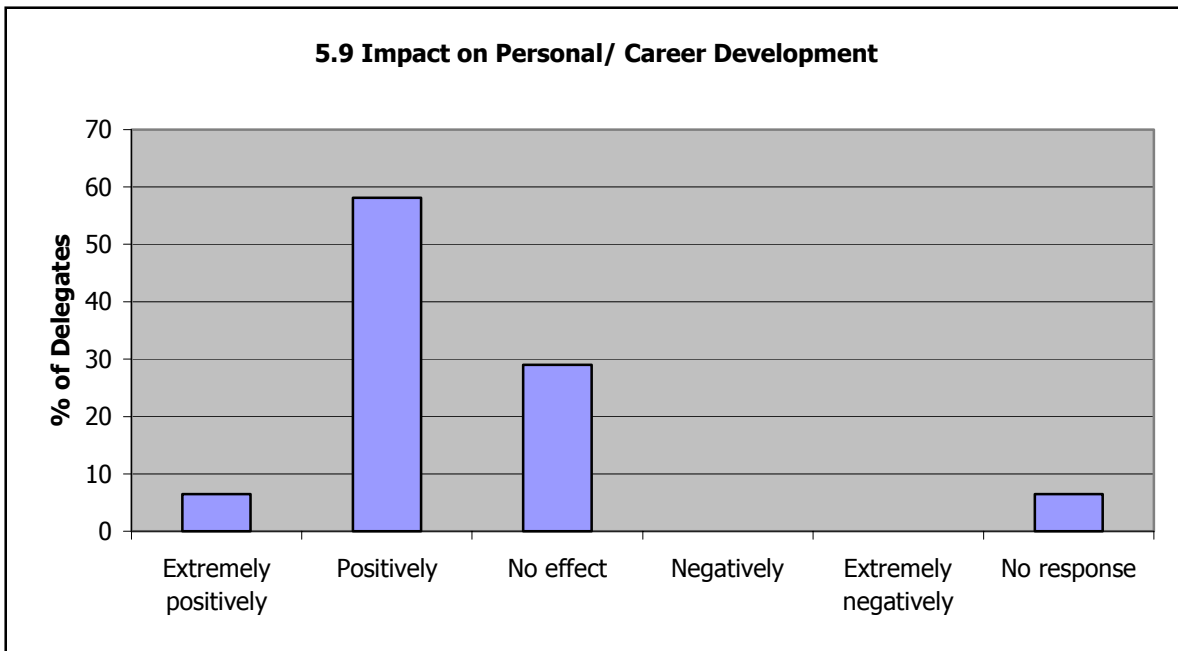
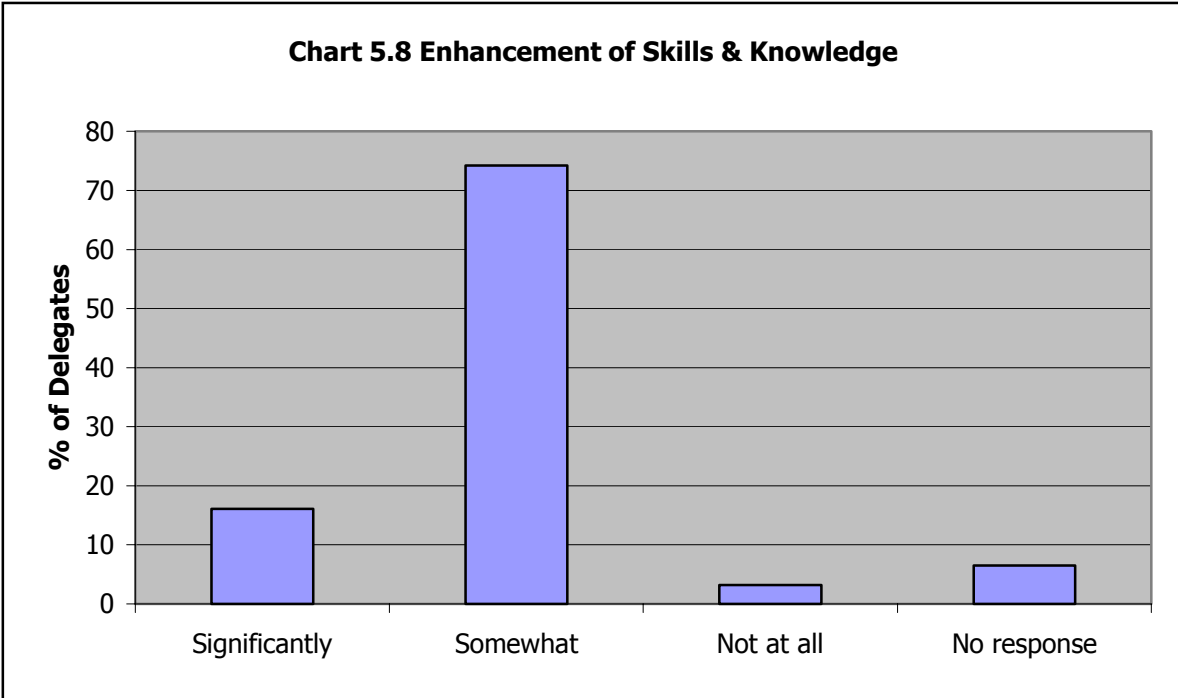


Based on their own experience, 71% of the respondents stated that they were either 'very satisfied' or 'somewhat satisfied' with the Market Advantage Programme (Chart 5.5)



65% of the respondents answered that they will either 'definitely' or 'probably' continue to use the Programme services in the foreseeable future (Chart 5.6).

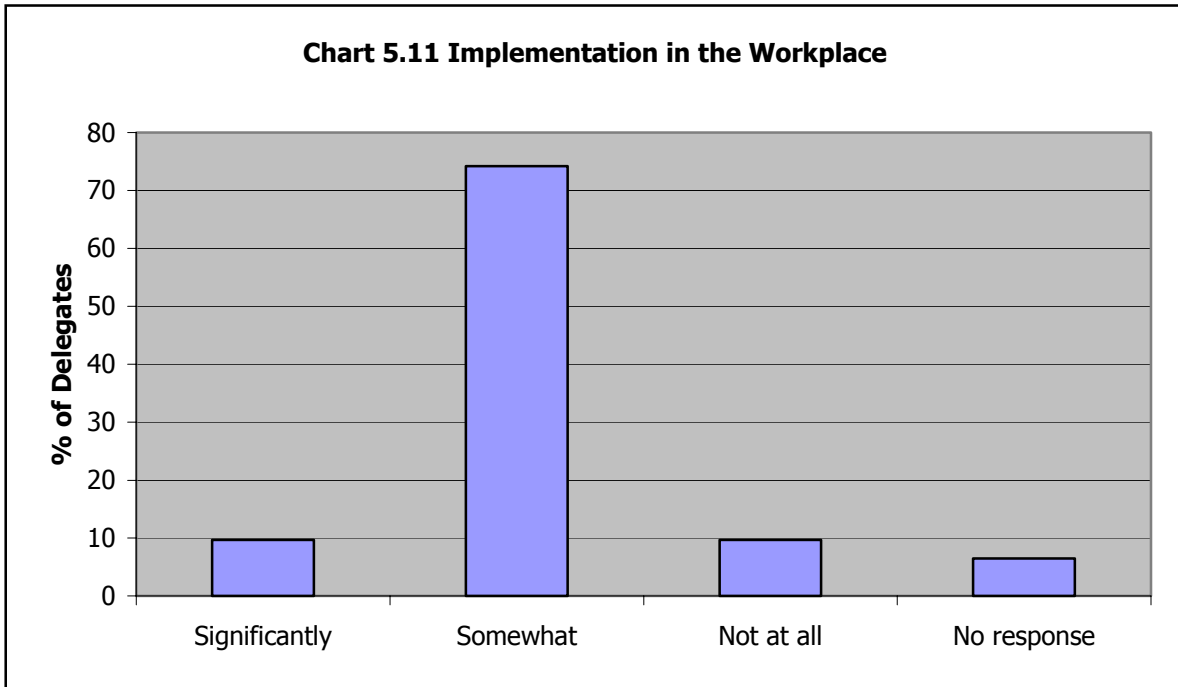
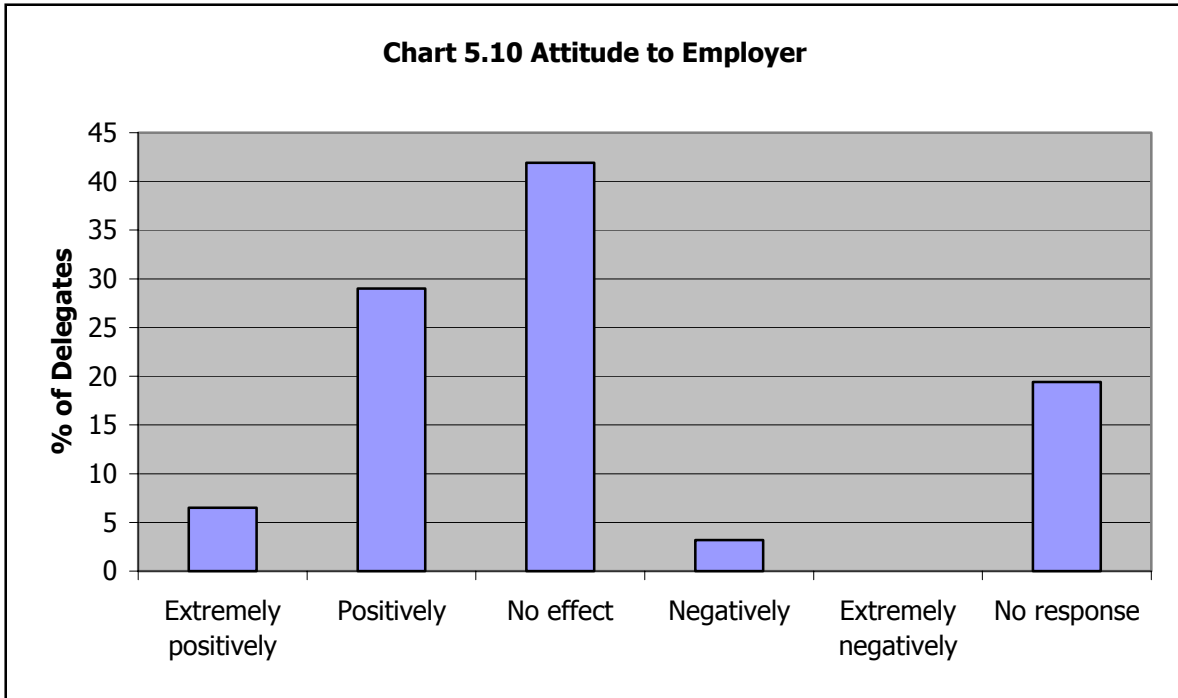
A key test of customer satisfaction according to the PAS 46 British Standard is whether the product would be recommended to someone else - 77% of respondents stated that they would 'definitely' or 'probably' recommend the Programme to a friend or colleague (Chart 5.7)



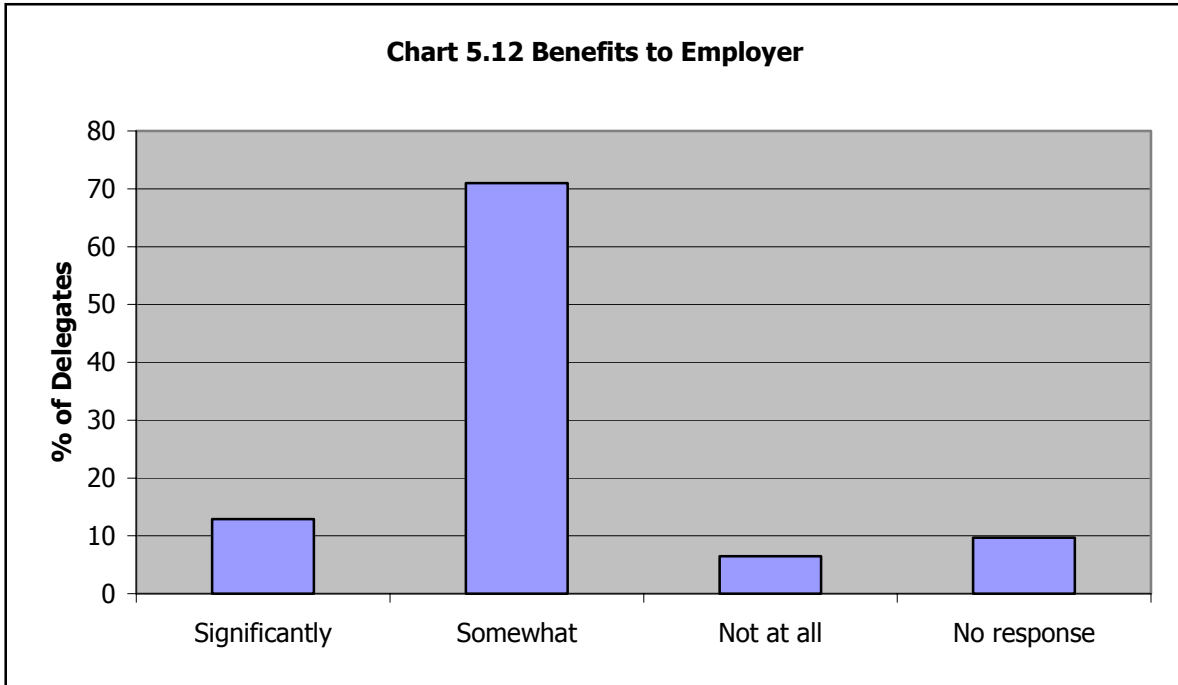
The programme was believed to have enhanced skill and knowledge 'significantly' or 'somewhat' among 90% of all respondents (Chart 5.8).

Involvement in the programme influenced 65% of the respondents 'extremely positively' or 'positively', while 29% felt that the programme had no effect (Chart 5.9).

In terms of the programme's influence on the participants' attitude towards their employer, 36% of the respondents mentioned that the influence was 'extremely positive' or 'positive', compared with 42% answering 'no effect' (chart 5.10).



84% of respondents indicated that the skills and knowledge gained from the programme have been implemented in their workplace either 'significantly' or 'somewhat' (Chart 5.11). Similarly 84% of respondents believed that their business had benefited as a result of their involvement in MAP activities (Chart 5.12).



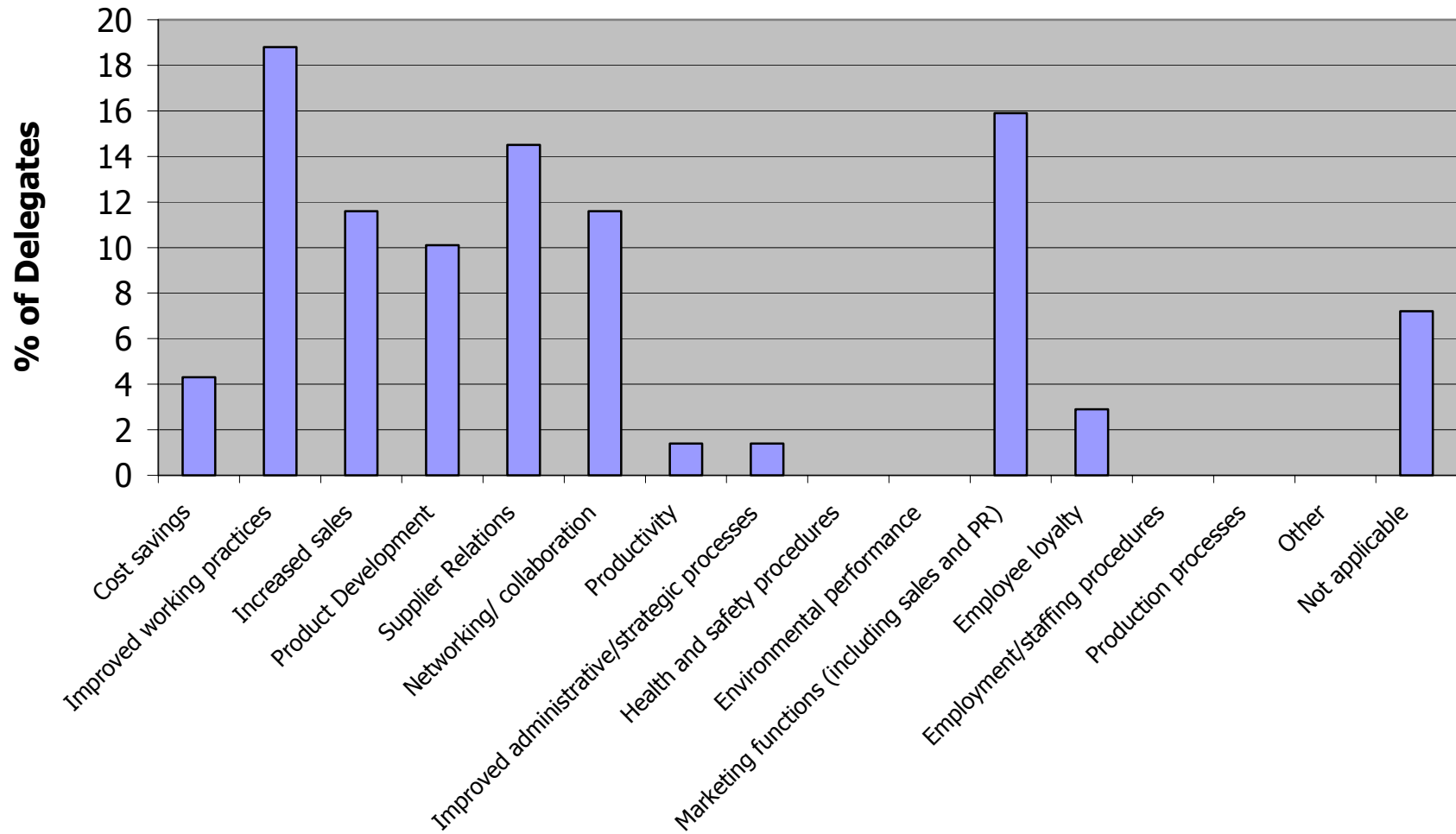
In terms of the areas of the business that were benefited by the programme, 13 respondents described 'Improved working practices' while 11 mentioned 'Marketing functions (including sales and PR)'. The other beneficial areas were 'Supplier relations', cited by 10 respondents, followed by 'Increased sales' and 'Networking/ collaboration', described by 8 respondents respectively (Chart 5.13).

The average number of workshops which the respondents wish to attend in future was 3.4, demonstrating significant demand for future MAP activities.

2 respondents answered that they would like to participate in 6 workshops, which is the largest number, while only one respondent said that he/she will not attend any in future.

24 out of the 31 felt that the cost of workshops was reasonable, while only one respondent did not. The remaining 6 did not comment on the reasonability of the cost.

Chart 5.13 Nature of Benefits to Employer



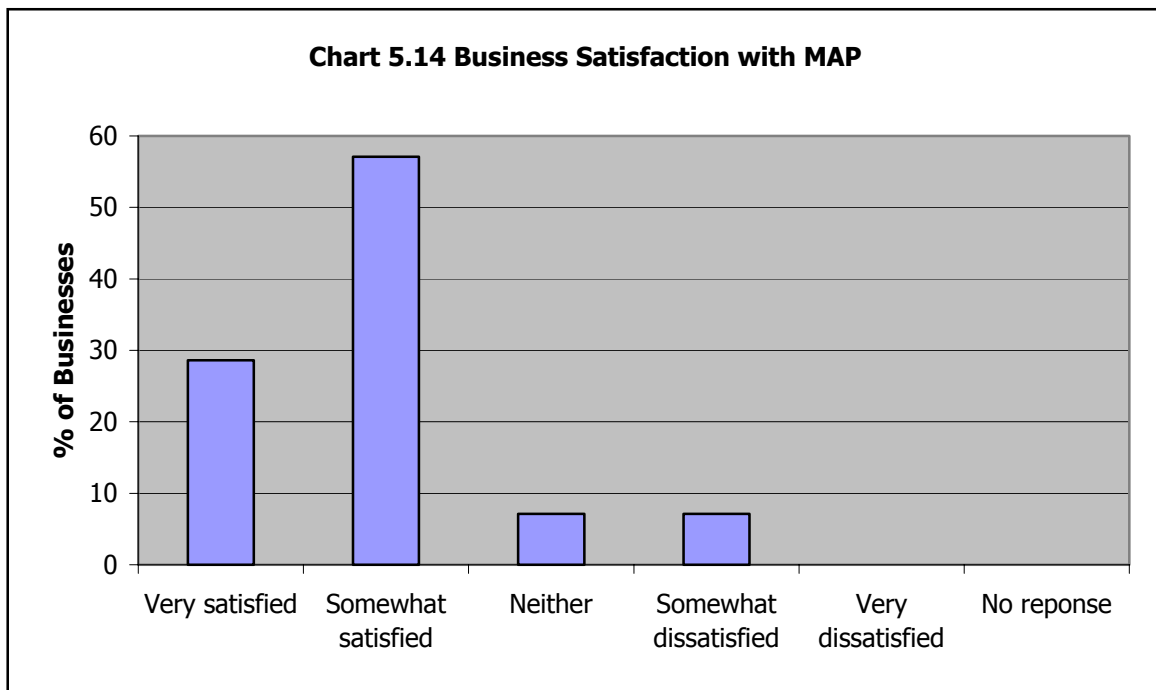
Impact on Businesses/ Employers

This section presents the results from the Participating Business Questionnaire, which involved enquiring about the impact of MAP activities on the delegate’s employer, by asking the Managing Director or other senior manager within the business.

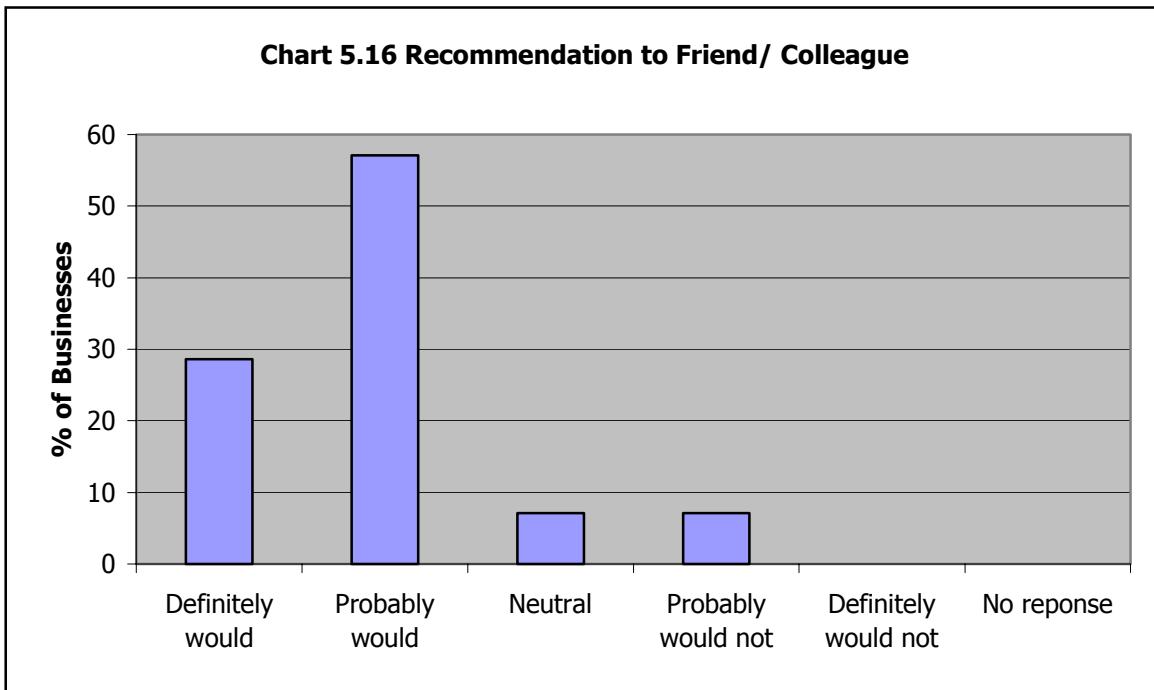
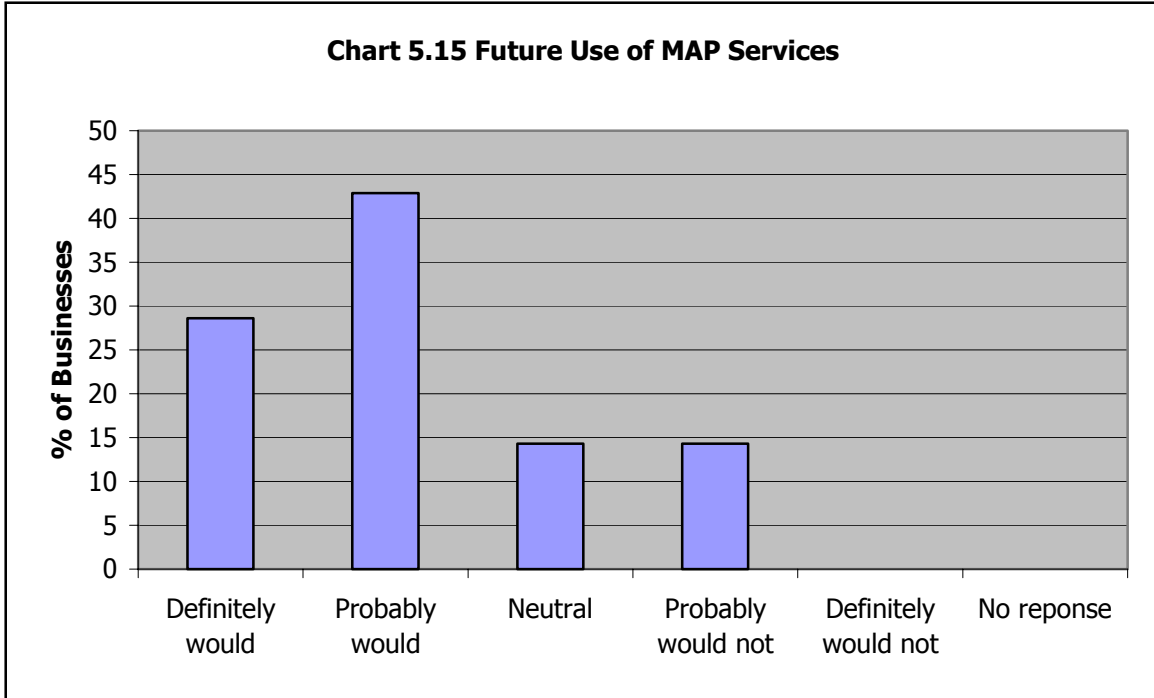
16% of the respondents answered that their employees attended at 2 workshops/ best practice visits while the employers of the other 16% of respondents joined in 3 or more workshops.

42% of the respondents dispatched more than 3 employees to this programme, 25% sent 2 employees and 17% had one employee involved with this programme.

92% of the respondents stated that they were either ‘very satisfied’ or ‘somewhat satisfied’ with the Programme, compared with 8% who indicated that they were ‘somewhat dissatisfied’ (Chart 5.14)

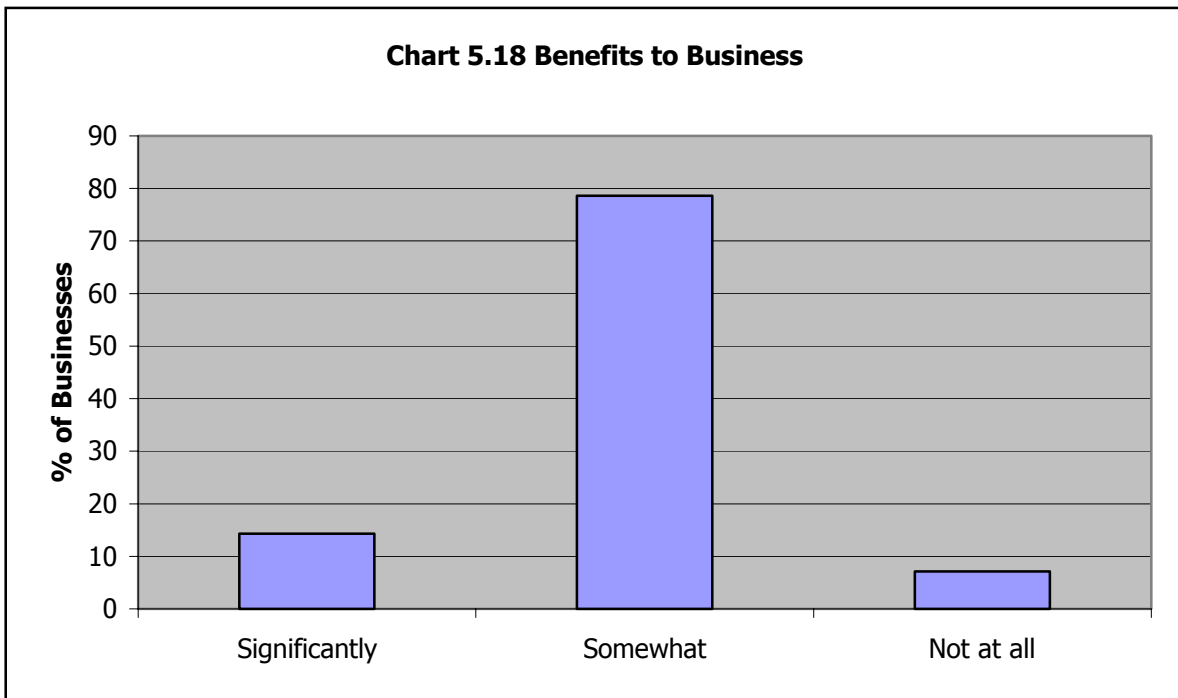
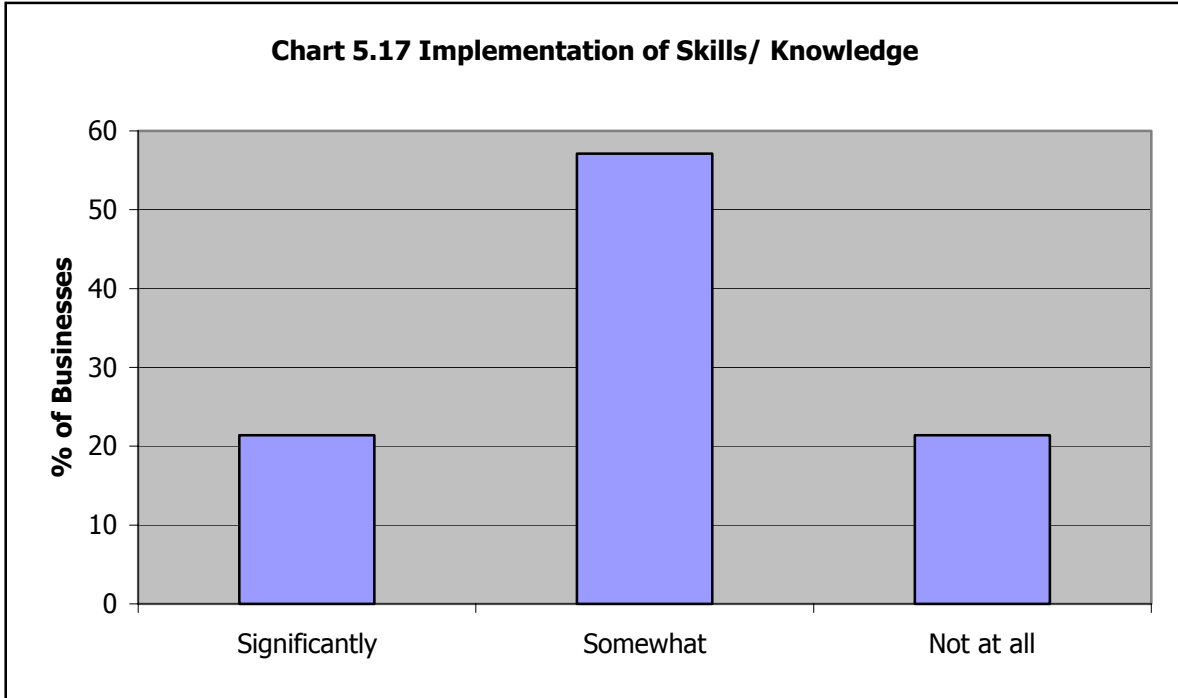


75% of the respondents considered that they would continue to use this programme either 'definitely' or 'probably' in the foreseen future, whereas 17% of the respondents had not decided the continuation.



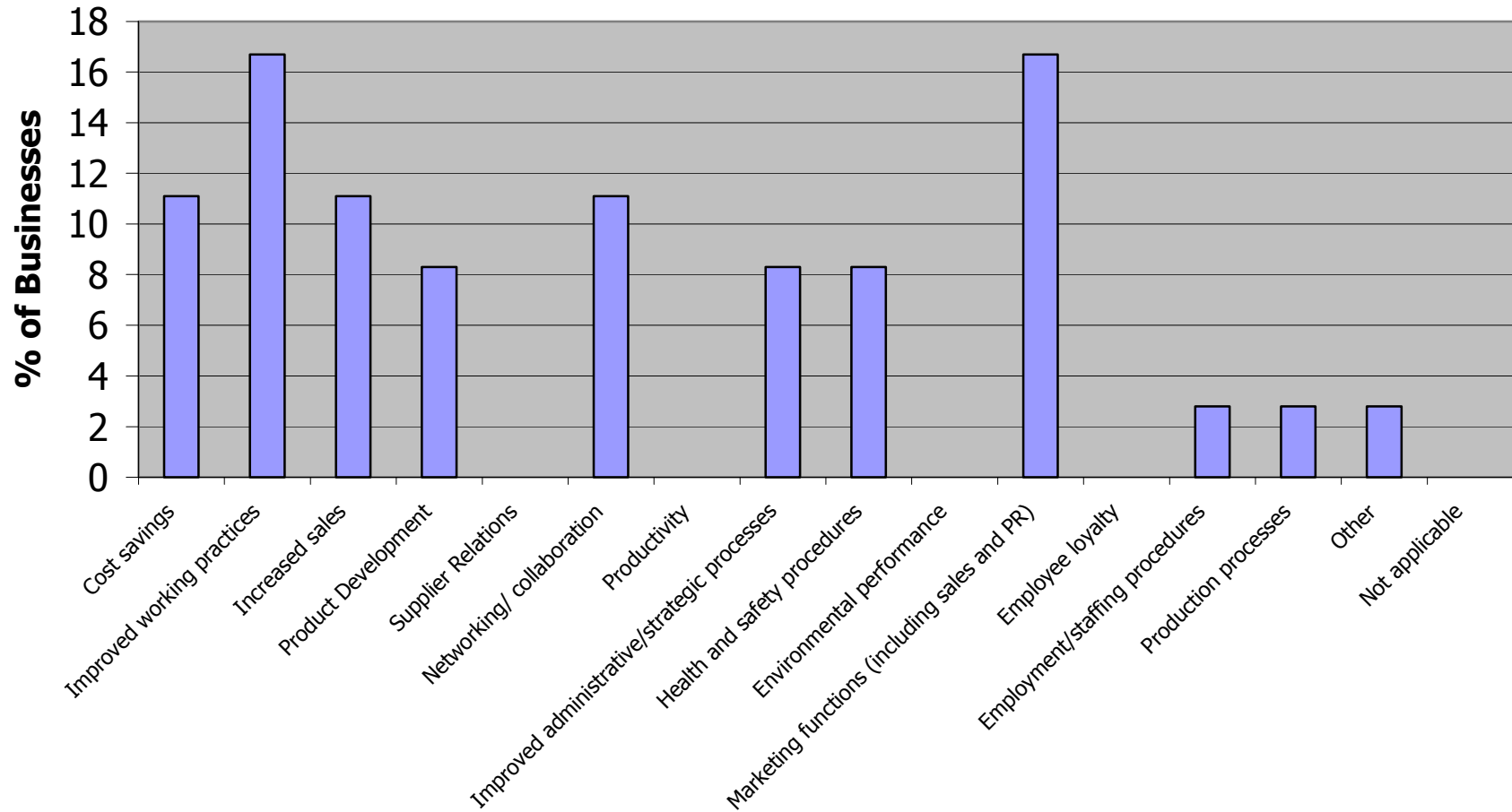
92% of the respondents would 'definitely' or 'probably' recommend this programme to others (Chart 5.16).

83% of the employer respondents believed that their MAP participants had implemented skills and knowledge gained from this program 'significantly' or 'somewhat' in the workplace.



Being involved in this programme was regarded as 'significantly' or 'somewhat' beneficial by 92% of the respondents (Chart 5.18).

Chart 5.19 Nature of Benefits to Business

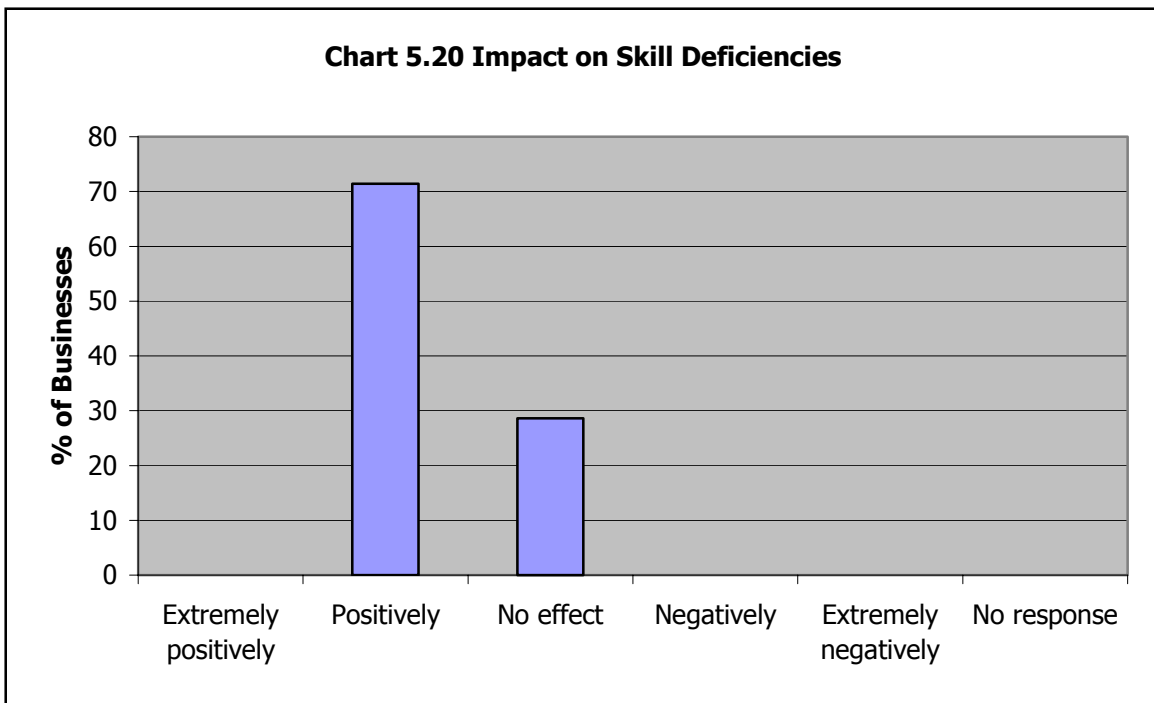


In terms of areas which have been benefited from the programme, 'Improved working practices' and 'Marketing functions (including sales and PR)' were described by 17% of respondents respectively, followed by 'Cost savings', 'Increased sales', and 'Networking/collaboration' which were mentioned by 11% respectively (Chart 5.19).

The total financial benefits that the respondents realised from involvement in this programme ranged from 0 to £20,000. The financial benefits expected to be realised over the next three years varied from 0 to £50,000.

In terms of impact that this programme has had on employment, the maximum number of jobs sustained was 50 while the number of jobs newly created ranged from 0 to 2.

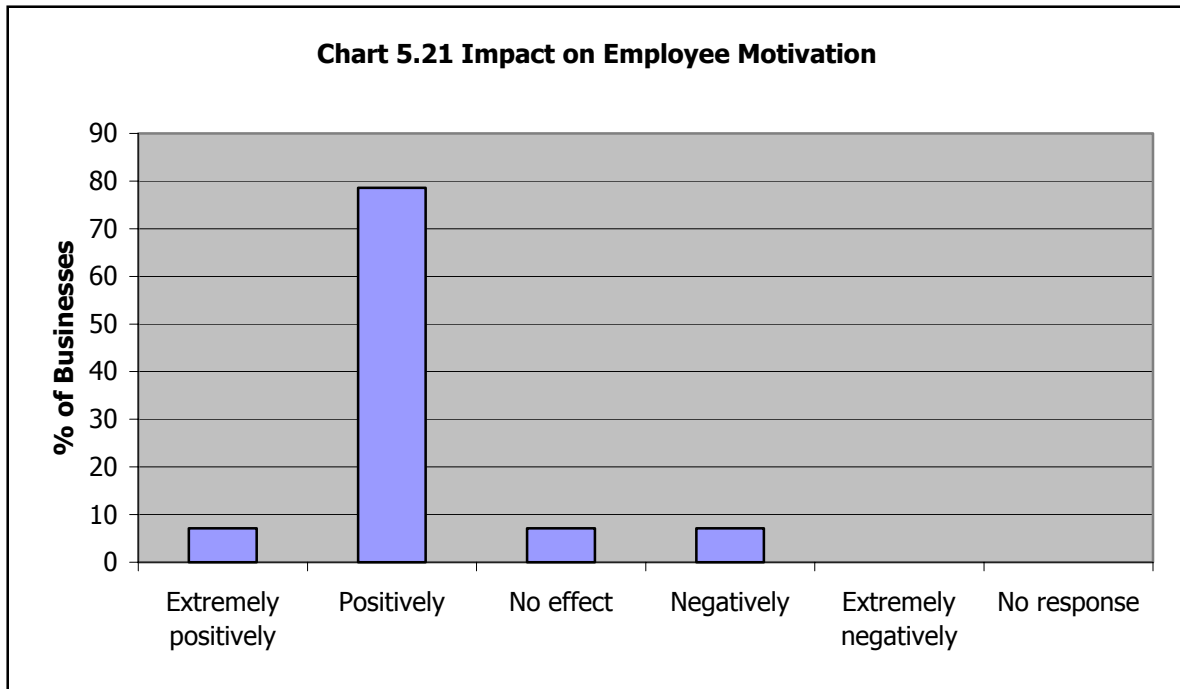
75% of the respondents answered that this programme positively influenced any skill deficiencies within their workforce (Chart 5.20).



In terms of the influence of this programme on motivation/ attitude of the staff that participated in this programme, 83% of the respondents found 'extremely positive' or 'positive' impacts (Chart 5.21).

75% of the respondents would be willing to pay for their staff to participate in future workshops/ best practice visits.

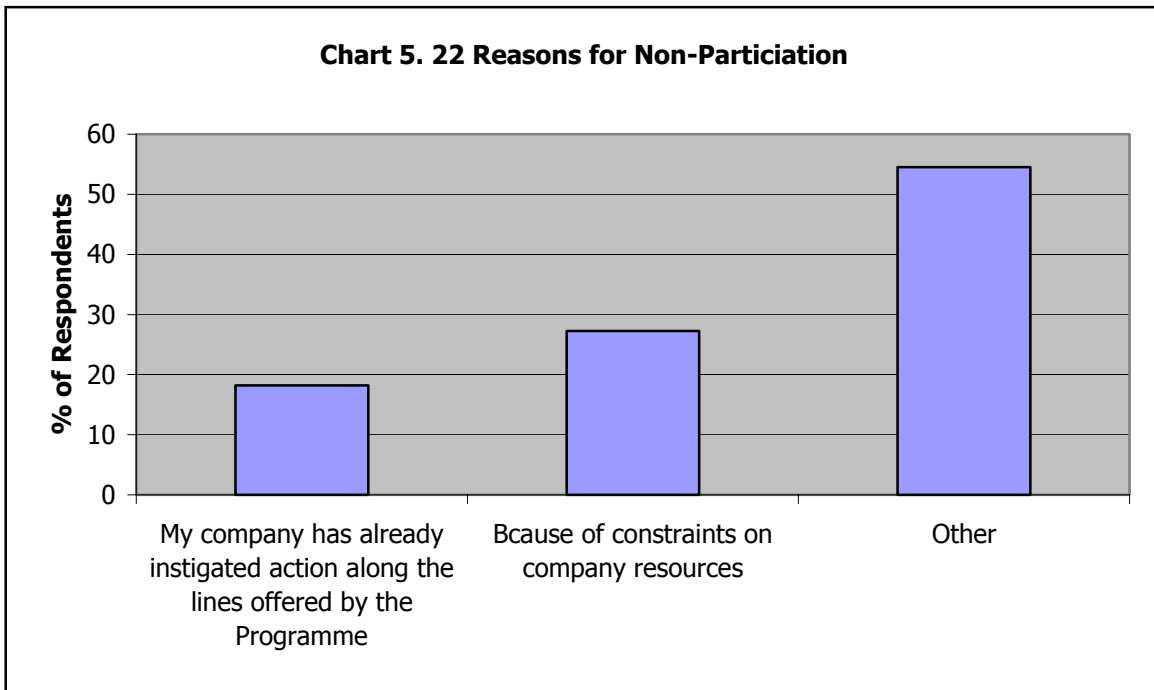
67% of the respondents felt that the cost of the workshops/ best practice visits was reasonable, while 25% of them did not comment on the reasonability of the cost.



Non-Participation Issues

Reasons for Non-Participation

The following set of results are based on the Delegate Survey Questionnaire (Appendix C) designed to identify the reasons why some Scottish Food & Drink businesses have not, to date, been involved in the MAP.



18% of the respondents mentioned that their company has already instigated action along the lines offered by the Programme, while 27% described constraints on company resources (Chart 5.22). More specifically, the respondents with the latter reason frequently explained their limited workforce—usually they are small family-run businesses without the manpower to attend the programmes. ‘Other’ reasons for non-participation shared 55%. The reasons included that the programmes do not exactly suit their business purposes and that for some rural businesses the locations of the programmes give a geographical hurdle to attend.

Tables 5.4 shows how likely it is that non-participating businesses would be interested in specific workshop topics that have been previously offered through the MAP. The ‘interest levels’ are based on the following:

- Definitely would = +3
- Probably would = +1
- Might or might not = 0
- Probably would not = -1
- Definitely would not = -3

Among 18 workshop topics 13 received a positive rating, which suggests that in an aggregate sense non-participants would be interested in those types of workshops, while 5 workshop topics had negative marks. The highest ratings are 1's for Exhibition Skills & Marketing, followed by three workshops, all of which obtained 0.94. They are Telemarketing, Advertising & Promotion, and Introduction to ECR (Chart 5.23).

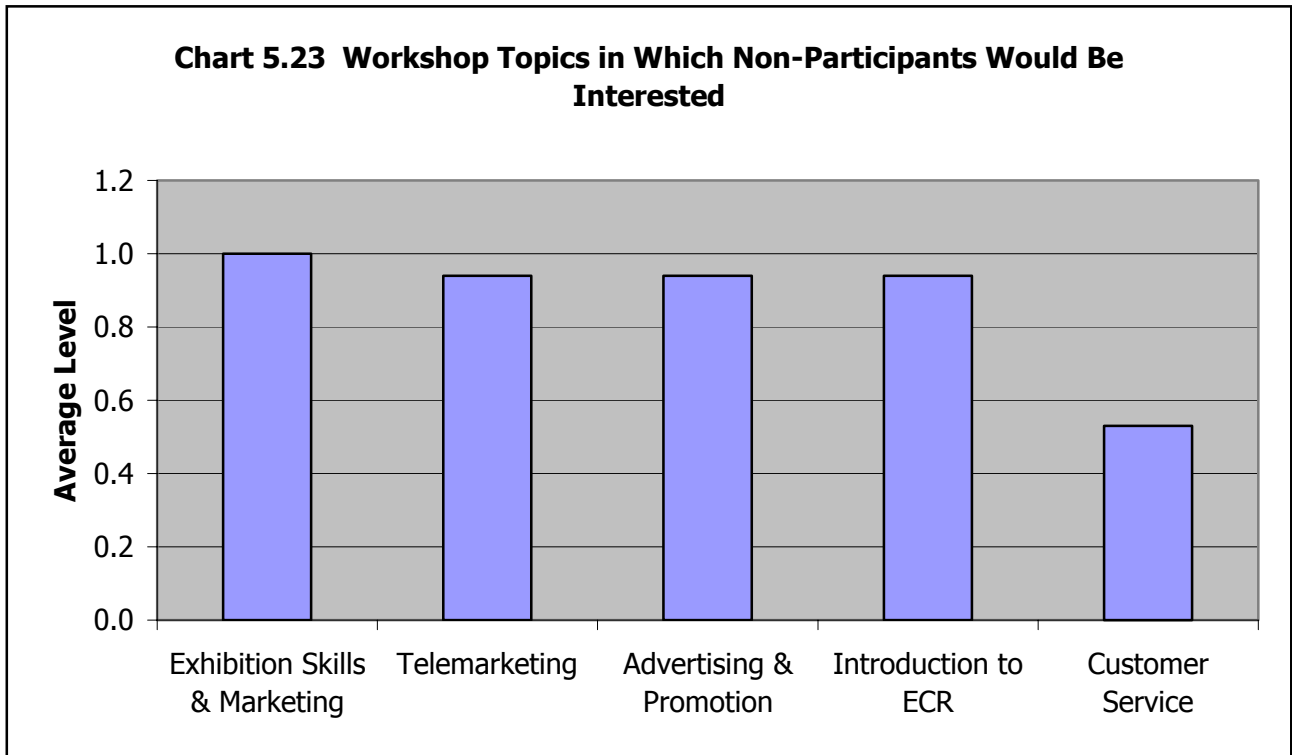
Table 5.4 Workshop in Which Non-Participants Would Be Interested

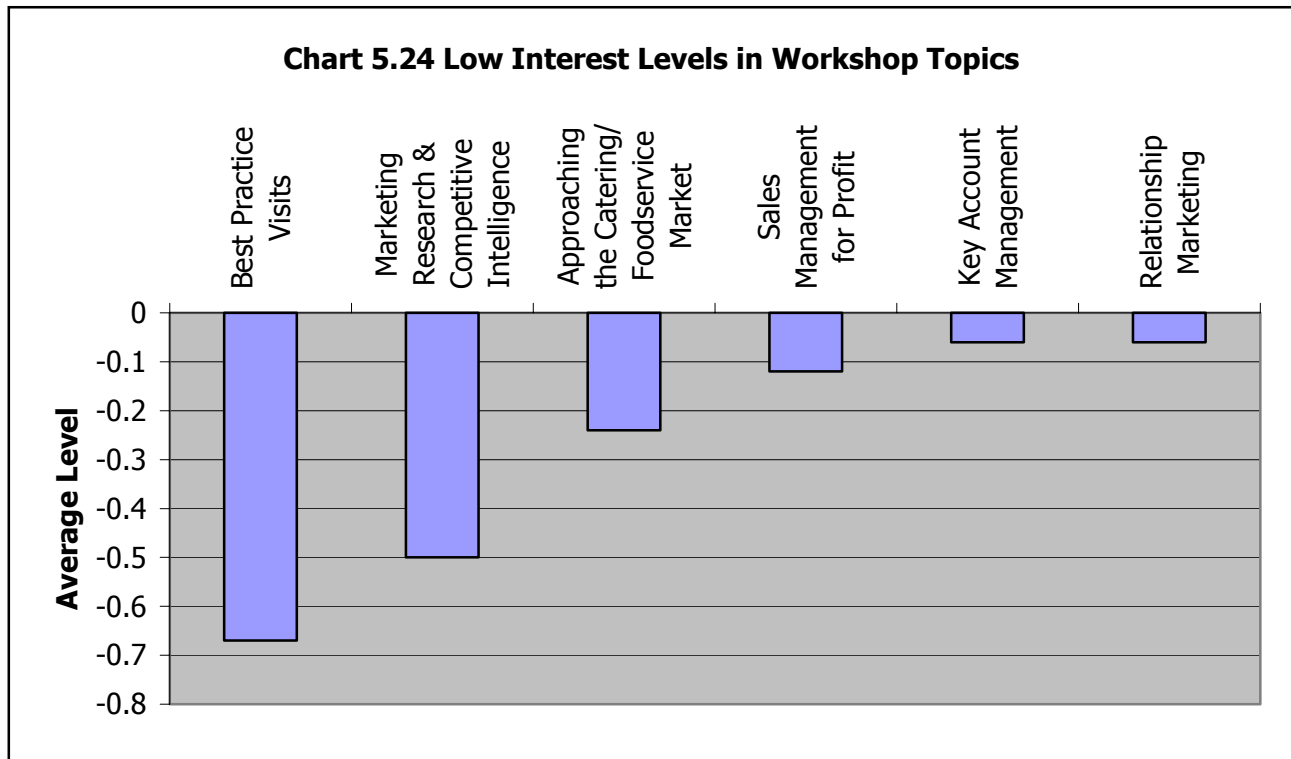
	No of Responses	Average Response (Interest Level)
Direct Marketing	19	0.32
Customer Service	17	0.53
Market Research & Competitive Intelligence	18	-0.50
Exhibition Skills & Marketing	17	1.00
Telemarketing	17	0.94
Advertising & Promotion	17	0.94
New Product Development & Pricing Strategy	16	0.31
Negotiation	17	0.24
Introduction to Category Mgmt	17	0.35
Approaching the Catering/ Foodservice Market	17	-0.24
Approaching the Retail Multiples	17	0.12
Key Account Management	17	-0.06
Introduction to ECR	16	0.94
Relationship Marketing	18	-0.6
Sales Management for Profit	17	-0.12
Knowing Your Consumer	17	0.24
Marketing Strategy for Small Businesses	19	0.37
Best Practice Visits	18	-0.67

It is important to note that the results in Table 5.4 must be treated with an element of caution. Non-participant businesses were asked to indicate their interest in these workshop topics based purely on the title only (see Appendix C). Under normal circumstances a decision on whether or not to participate in a workshop will be informed

by a brief summary of the workshop objectives and content. Given this shortcoming, however, the information in Table 5.4 still provides an initial idea of the topic areas that are likely to be of interest to current non-participants.

In Chart 5.24 there are some workshop topics that have negative interest levels from non-participants. The workshop topics, which received negative ratings, included Best Practice Visits (-0.67), Market Research & Competitive Intelligence (-0.5) and Approaching the Catering/ Foodservice Market (-0.24). As seen previously, however, businesses that have participated in these types of workshops evaluated the programmes positively.





Cost-Effectiveness & Value for Money Assessment

Future Demand

There is a range of evidence that we can utilise to make predictions about likely future demand for MAP services:

- Historical demand levels
- Historical satisfaction levels
- Customer loyalty (delegates and businesses)
- Willingness-to-pay
- Non-participant demand

Historical Demand

Demand for MAP workshops and BPVs in the past has demonstrated a desire within the Food & Drink sector in Scotland for the type of services offered under the Programme. For many of the skill development workshops private sector demand has been exceptionally high (e.g. 50+), while for others demand has been disappointingly low.

Eight of the 19 workshop topics failed to achieve more than 5 private sector delegates. When public sector attendance is taken into account there are still 3 workshops with 5 or fewer attendees. There may be specific circumstances surrounding these poorly attended workshops (e.g. last minute cancellations, clash with other industry-wide events, seasonal patterns within the sector etc.) but it is clear that these workshops are not likely to be cost-effective on an individual basis. Overall however - with the potential to cross-subsidise these with surplus revenues from more popular events – the historical levels of demand suggest that future demand will be sufficient to consider continuation of the Programme.

Satisfaction Levels

Delegate satisfaction levels are generally high, based on our +3 to –3 scale, and these findings are supported by the individual post-workshop evaluation results obtained from SAC Aberdeen.

Customer Loyalty

PAS 46 (British Standards Institution) suggests a three-stage survey process for identifying the extent of true customer satisfaction and loyalty. In both the delegate and participant business survey questionnaires we included this three-stage process for this purpose. The key results are summarised in Table 6.1 below.

Table 6.1 Evidence of Customer Loyalty and Future Demand

	Overall Satisfaction with MAP		Future Use of MAP Services		Recommendation to a Friend/ Colleague	
	Very	Somewhat	Definitely	Probably	Definitely	Probably
Delegates	23%	48%	29%	36%	42%	36%
Participant Businesses	29%	57%	29%	43%	29%	57%

The results in Table 6.1 indicate high levels of customer loyalty towards the Programme services, highlighting potentially strong future demand. It is critical to note that these positive views are consistent across both the individual delegates and their employers.

We can also compare the MAP satisfaction levels with generic satisfaction levels with public sector business support services in Scotland.

- The Audit Commission undertook an evaluation of business attitudes towards business support provision in Scotland in early 2002, as part of the Local Economic Forum process. This showed that 31% of business survey respondents in the SE Network area either agreed or strongly agreed that...*the public sector business services available in the local area are relevant to the needs of my business.*
- FSB/Strathclyde University also undertook a survey of attitudes to business support services in Scotland in 2000 and this showed that only 5% of business were either very satisfied/ satisfied with the co-ordination of business support services
- A further survey, undertaken by SER in 2001, looking at business support services in Tayside highlighted that 37.6% of respondents were either satisfied or very satisfied with the quality and range of business support services available.

While it is not possible to directly compare the business responses to our MAP survey with these other survey results there is a general impression that MAP respondents are, on average, more positive about the support they have received under the Programme relative to generic business perceptions of support provided by public sector agencies in Scotland and Tayside.

Willingness-to-Pay

A further indicator of likely future demand is in the willingness of businesses to continue to pay for attendance at MAP events. 71% of businesses that had already participated in the Programme activities stated that they would be willing to do so, while 21% answered negatively and 7% failed to answer the question. This adds further support to the idea that demand for future MAP events will be significant.

Non-Participant Interest in MAP

In addition to the views of delegates and their employers we questioned non-participant businesses as to why they had not made use of the MAP services and potential future involvement.

18% of respondents stated that they had already instigated action along the lines of that offered by the Programme, indicating that these are unlikely to participate in future unless there are significant changes to Programme services offered. 27%, however, stated that constraints on resources was the main factor for non-participation – indicating potential future involvement if those constraints were removed either by the businesses themselves or, potentially, via public sector intervention. The “other” reasons for non-participation (accounting for 55% of the sample) included factors, such as location of events and because the events do not exactly fit with requirements, that can be influenced by service-providers to encourage future participation.

The above evidence indicates that the strong levels of historical demand are likely to continue in future. In addition, careful selection of workshop topics, BPVs, location and awareness of other constraints on business participation indicates that realised demand levels may be further enhanced. Before moving on to look at the cost and revenue aspects of the Programme it is useful to highlight the specific workshops/BPVs that are likely to generate significant interest among the business community.

Future Demand for Specific Workshop Topics/ BPVs

At this stage, however, it is worth noting the views of some of the key stakeholders, supported by evidence elicited via our survey work, that some sort of market research exercise be undertaken in order to identify potential demand for specific workshop topics. Unfortunately, the evidence on demand for future workshop topics derived from our survey results are rather confusing and, due to the low response rates, we are not able to say with sufficient certainty which workshops should and should not run in future.

Demand for specific events in the past indicate that the following events may prove popular (although all current demand may be "used up"):

- Approaching the Catering/ Food Service Market
- Negotiation
- Approaching the Multiples & Key Account Management
- Introduction to ECR
- New Product Development & Pricing
- Advertising & Promotion
- Approaching the Retail Multiples

Satisfaction levels among delegates suggests that workshops such as the following should be popular in future:

- Key Account Management
- Direct Marketing
- Implementing Category Management & ECR
- New Product Development & Pricing
- Approaching the Retail Multiples
- Knowing Your Consumer
- Approaching the Multiples & Key Account Management

Evidence, from non-participants indicating workshops in which they may be interested, however suggests the following events may prove popular:

- Exhibition Skills & Marketing
- Telemarketing
- Advertising & Promotion
- Introduction to ECR
- Customer Service

The above evidence suggests that there are some workshop events that have proved very popular in the past but that they are not necessarily the best in terms of customer satisfaction. In addition, there is little coincidence between those events that have proved successful in the past and likely demand from those businesses that have, thus far, not participated in the Programme. In addition, because an event was popular in the

past it may mean that all demand for that workshop topic has been used-up, at least in the short-term.

The survey questionnaires also asked delegates, participant employers and non-participant employers to suggest topics for future MAP events. The results provide some limited clues as to how to proceed although response rates were low in all samples.

Topics mentioned include:

- Information on specific categories when dealing with multiples
- Fish industry issues e.g. distribution
- Best practice visits
- Evolution of brands
- Basic IT (e.g. Access and Excel utilisation)
- Internet marketing/ web-site potential
- Meet the buyer
- Supplier co-operation
- Partnering (vis-à-vis open book accounting)
- Sales/ catering sales in food industry

Given the above information it is difficult to state with any certainty what workshop topics and BPVs should be run in the immediate future under the Programme. In addition, as noted in our consultation with stakeholders, it is important to co-ordinate MAP workshop topics with other events available through Scottish Food & Drink as well as other industry-related activities available from other providers.

Financial Assessment

Direct Costs & Revenues

The estimated costs for running a new workshop is £1,500 per day and a repeat workshop is estimated to come in at an average of £900.

Since 1998 20 new workshops have been run and 22 repeat workshops have been offered. This provides an estimated workshop cost of £49,800. We have also assumed that the four BPVs cost on average of £1,500. this gives a total event cost of £55,800

Since 1998 there have been a total of 316 delegates. Businesses pay £132 (+VAT) per delegate and a reduced rate of £80 (+VAT) for second/ subsequent delegate(s) attending the same event. There were 235 delegates paying the full price and a further 81 who received the discounted rate. We estimate direct revenues associated with MAP since 1998 of £37,500.

This represents a net operating deficit on the workshop/ BPV activities of £18,300.

In addition to the workshop/BPV costs, however the managing agents are also paid a fee by SE/SET. The total management fee over the period since July 1998 is £228,450.

Cost-Benefit Assessment

In addition to the direct costs and revenues from service delivery the MAP activities can generate other costs and benefits for participants and participant businesses.

The participant business survey was designed to identify the net additional benefits arising to businesses involved with the Programme.

92.9% of participating business stated that they had benefited from the Programme to some extent. These benefits came in a range of areas. In particular improved working practices, marketing functions, cost savings and network/ collaborative benefits were all significant elements of the business experience. In addition, over 70% of businesses stated that MAP participation had positively affected existing skill deficiencies and around 86% stated that MAP participation had had a positive influence on employee motivation.

At the same time delegates also stated that they received benefits from MAP participation. Around 90% of delegates stated that MAP participation had enhanced their personal skills and knowledge, while 66% believed that participation had a positive impact on their personal and career development. 35% of delegates also stated that MAP participation had improved their attitude towards their employer. 85% of delegates believed that the skills and knowledge gained through MAP had been implemented in the work-place and 85% believed that their employer had benefited from MAP participation. The specific areas of delegate businesses that benefited were believed to be improved working practices, marketing functions, supplier relations and networking/ collaboration – similar to those areas identified by the employers themselves.

While business responses to questions enquiring about actual benefits in financial terms and in terms of jobs were limited, there is evidence that some businesses have benefited financially from MAP involvement and that this has had an impact on employment.

The average estimated financial benefit to participating businesses to date is £2,638. Grossed-up to reflect the total population of participating businesses provides an estimated benefit of £19,785 since 1998.

Based on the sample responses the average financial benefit expected over the next 3 years – arising from participation to date is £6,888. Grossed-up to reflect non-respondents this gives a total financial benefit to date of £51,660.

The previous and expected net additional benefits arising to participants from MAP activities undertaken to date are £71,445.

In addition to the financial impacts on businesses the employment effects can also be examined. Survey responses indicate that the MAP activities have helped to sustain 70 jobs, an average of 2.5 per employer. This can be grossed up for the total population to provide an estimate of total jobs sustained as 300. We would, however, treat this figure

with caution as it is strongly influenced by a single outlier. A more realistic estimate, therefore, would be 169 jobs sustained.

In terms of the number of jobs created the survey responses indicate that an average of 0.21 jobs have been created as a result of MAP participation. Grossing-up to reflect the entire population of participant businesses indicates a total job creation figure of 25.7 FTEs (full-time equivalents).

Cost-Effectiveness Assessment

In the following cost-benefit calculations we use multiplier estimates for Scotland derived from previous Scottish Executive analysis (1998 Scottish Input-Output Tables, 1999). The multipliers adopted are based on those presented in Table 6.2 and 6.3.

Table 6.2 Scotland Food & Drink Multipliers

		Type II	
		Output Multiplier	Employment Multiplier
8	Meat Processing	2.393	2.572
9	Fish and Fruit Processing	1.791	1.756
10	Oils and Fats	1.974	2.905
11	Dairy Products	2.396	3.364
12	Grain Milling and Starch	2.281	4.816
13	Animal Feeding Stuffs	1.939	4.936
14	Bread, Biscuits, etc	1.702	1.476
15	Sugar	2.172	4.455
16	Confectionery	1.685	1.542
17	Miscellaneous Foods	1.925	1.989
18.1	Spirits and Wines, etc	1.772	3.634
18.2	Beer Brewing	1.795	2.755
19	Soft Drinks	1.624	2.568

Source: Scottish Executive

Based on the information in Table 6.2 we assume the following composite multipliers (Table 6.3)

Table 6.3 Composite Food & Drink Multipliers

	Sector	Type II	
		Output Multiplier	Employment Multiplier
	Scotland	1.96	3.00

Source: SER Estimates

The public sector cost of workshop operation (subsidy) is estimated as £18,300, whereas the net additional benefits arising to participants are £71,445.

This implies a cost-benefit ratio of 3.9. In other words, based on our estimates every £1 of public sector input generates £4 of direct benefit to the wider economy.

If we attach the standard output multiplier estimate for food and drink in Scotland this cost-benefit ratio rises to 7.7.

The above calculation, however, fails to account for the management fee also attributable to the MAP. Based on these revised cost estimates, therefore, the total public sector contribution to MAP is:

	£228,450 (management fee)
+	£ 55,800 (workshop costs)
-	<u>£ 37,500 (revenues)</u>
	<u>£246,750</u>

This implies a cost-benefit ratio of 0.3 (without multiplier effects) and 0.57 (with Type II multiplier effects). This is somewhat below the type of returns that may be expected of public sector business support activities. It is, however, important to examine all MAP impacts, not simply the financial impacts on participant businesses.

Based on our estimate of 25.7 FTEs we have a cost-per-job estimate of £9,601 for the MAP activities. If we also introduce the employment multiplier effects we have an estimated 77.1 FTEs created at a cost-per job of £3,200.

There are also an estimated 169 jobs sustained in the sector, implying that further jobs will be sustained throughout the Scottish economy as a result of the significant multiplier effects involved – potentially as high as 507.

In addition to the output and employment effects of MAP it is important to also recognise the other intangible benefits that MAP activities have generated. These include factors such as employee loyalty and motivation and reduced internal skill deficiencies that may not have been factored into employer estimates of the financial benefits associated with MAP participation.

There may also be intangible benefits for the SE Network. Given that MAP activities are well received with relatively high levels of satisfaction and “customer loyalty” the Programme may well produce more favourable attitudes towards SE and other public sector business support agencies, and positive PR, which may have knock-on effects in future business participation in SE Programmes. This PR effect is clearly demonstrated in the likelihood that participants (delegates and their employers) are willing to recommend MAP to friends and colleagues.

Conclusions and Recommendations

The following summarises the key conclusions and recommendations arising from the research undertaken as part of the MAP evaluation exercise. The conclusions are set out according to the original 5 evaluation objectives and recommendations are then presented based on these findings.

Conclusions

Research Objective 1

To evaluate the overall effectiveness of the MAP and of the Workshops and Best Practice Visits

The MAP workshops and BPVs have, overall demonstrated reasonable cost-effectiveness and value for money. Both delegates and participant businesses have identified significant benefits associated with their MAP involvement. Demand has generally been strong for MAP events and satisfaction levels are high. Best practice tests of customer loyalty indicate that both businesses and delegates strongly support MAP activities. Evidence points to continued strong demand for MAP events although the specific nature of these will need to be determined through further consultation with Scottish Food & Drink and businesses themselves. The cost-benefit ratios are somewhat disappointing (e.g. 0.57) although the employment effects in terms of job creation estimates are extremely encouraging indicating an overall sound case for the cost-effectiveness and VFM of the Programme.

Research Objective 2

To evaluate the future relevance of past Workshop topics and to recommend relevant topics for 2004/5 and demonstrate strategic alignment (i.e. with Smart, Successful Scotland, SEN's Priority Targets and specific strategic objectives relevant to Scottish Food and Drink

The levels of demand for, and satisfaction with, the previous MAP events suggest that the Programme has selected appropriate events for the client group in most instances. There are, however, some workshops that have been poorly attended and are unlikely to be cost-effective on an individual basis and have had to be cross-subsidised by more popular events. We have attempted to highlight the most popular past events and attempted to identify popular topics for future MAP activities but the survey responses are somewhat confusing. We would suggest that, dependent on timing issues, workshop topics such as the following are likely to prove popular:

- Approaching the Catering/ Food Service Market
- Negotiation
- Approaching the Multiples & Key Account Management
- Introduction to ECR
- New Product Development & Pricing

- Advertising & Promotion

Discussions with stakeholders and document review indicate that the MAP activities and objectives have demonstrated strategic alignment with wider Scottish Food & Drink, SE Network and Scottish Executive priorities. MAP activities need to be updated in line with changing objectives and/ or priorities among these key organisations and again, we would emphasise the need for regular dialogue between MAP managers and Scottish Food & Drink in order to identify priorities and co-ordinate activities effectively.

Research Objective 3

To measure the impact of Workshops on delegate performance and on the performance of their businesses

The survey responses elicited from both delegates and the participating businesses point to significant benefits arising from MAP involvement.

92.9% of participating business stated that they had benefited from the Programme to some extent. These benefits came in a range of areas. In particular improved working practices, marketing functions, cost savings and network/ collaborative benefits were all significant elements of the business experience. In addition, over 70% of businesses stated that MAP participation had positively affected existing skill deficiencies and around 86% stated that MAP participation had had a positive influence on employee motivation.

Delegates also stated that they benefited from MAP participation. Around 90% of delegates stated that MAP participation had enhanced their personal skills and knowledge, while 66% believed that participation had a positive impact on their personal and career development. 35% of delegates also stated that MAP participation had improved their attitude towards their employer.

The cost-benefit ratio for MAP activities is 5.5 in terms of public sector input and 1.8 when both public and private sector inputs are taken into account. These figures suggest that the Programme is cost-effective and is providing reasonable value-for-money.

Research Objective 4

To examine previous Workshop delivery mechanisms and to make recommendations for the future

Satisfaction ratings and other data elicited from delegates indicate that the design and delivery mechanisms have been generally welcomed. It is unlikely to be possible to "please all of the people all of the time" and negative comments on these issues have been minimal. A good variety of topics and locations have been on offer and this should be continued. There have been some calls for greater inter-action from participants – often critical to learning in management education – and speakers should be encouraged to include a participative element.

Research Objective 5**To analyse future funding options for the Workshops**

The general view from delegates and their employers is that the workshops and BPVs are providing value for money. There may be scope to increase the private sector cost relative to the public sector contribution although this may have a detrimental effect on demand. There are already some organisations that have not participated to date purely because of resource issues in terms of both the direct cost of workshops and the cost associated with the fact that the member of staff will be out of the workplace for the day. Overall, our view is that workshop costs should not rise significantly more than inflation.

Recommendations

The following recommendations are reasonable based on the evidence used within the research outlined in this document:

1. The MAP workshop and BPV activities should continue as they provide overall value for money.
2. Workshops for which demand is below reasonable levels should not proceed and an effective system for both assessing viability and managing any subsequent postponement should be introduced.
3. The selection of workshop topics and BPVs, as well as other issues such as cost, location etc., should be informed by market research (which we expect will be undertaken by Scottish Food & Drink). While feedback from participants has been collected and acted upon since SET took over project management it is also important to consider the views of current non-participant businesses.
4. MAP activities should be fully co-ordinated with other activities undertaken by Scottish Food & Drink, such as the Masterclass programme, and other generic business support services such as for example, e-commerce, where there is potential for overlap.
5. On-going monitoring of individual workshops should be continued, and is important for both quality control (e.g. speakers) and identifying potential workshop/BPV topics.

Appendix A

Market Advantage Evaluation: Workshop/ Best Practice Visit Delegate Survey

Q1. How satisfied are you with the workshops/ best practice visits that you have attended? (please ✓)

Workshops	Very satisfied	Somewhat satisfied	Indifferent	Somewhat dissatisfied	Very dissatisfied
Direct Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approaching the Multiples & Key Account Mgmt.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Implementing Category Management & ECR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Market Research & Competitive Intelligence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exhibition Skills & Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telemarketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advertising & Promotion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Product Development & Pricing Strategy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Negotiation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Introduction to Category Mgmt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approaching the Catering/ Foodservice Market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approaching the Retail Multiple	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Key Account Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Introduction to ECR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relationship Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Management for Profit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowing Your Consumer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Strategy for Small Businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Best Practice Visits	Very satisfied	Somewhat satisfied	Indifferent	Somewhat dissatisfied	Very dissatisfied
Mackay's (1999)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mackay's (2002)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mackie's	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Castle MacLellan Foods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q2 How satisfied are you that the workshops/ best practice visits that you attended met your objectives?

Very satisfied	Somewhat satisfied	Neither Satisfied nor dissatisfied	Somewhat dissatisfied	Very dissatisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q3 Based on your experience, how satisfied are you with the Market Advantage Programme overall?

Very satisfied	Somewhat satisfied	Neither Satisfied nor dissatisfied	Somewhat dissatisfied	Very dissatisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q4 Based on your overall experience, how likely would you be to continue to use the Programme services in the foreseeable future?

Definitely would	Probably would	Might or might not	Probably would not	Definitely would not
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q5 Based on your overall experience, how likely are you to recommend the Programme workshops/ best practice visits to a friend or colleague?

Definitely would	Probably would	Might or might not	Probably would not	Definitely would not
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q6 To what extent has your involvement with the Market Advantage Programme enhanced your own skills and knowledge?

Significantly	Somewhat	Not at all
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q7 Please indicate to what extent your own involvement in the Market Advantage Programme has influenced your personal/ career development

Extremely Positively	Positively	No effect	Negatively	Extremely Negatively
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q8 Please indicate to what extent your own involvement in the Market Advantage Programme has influenced your attitude towards your employer

- Extremely
Positively
- Positively
- No effect
- Negatively
- Extremely
Negatively

Q9 To what extent have any of the skills and knowledge gained from the Programme been implemented in your workplace?

- Significantly
- Somewhat
- Not at all

Q10 In your view, to what extent has your business benefited from your involvement in the Programme?

- Significantly
- Somewhat
- Not at all

Q11 Please indicate areas in which you feel your business has benefited from your involvement with the Programme.

- Cost savings
- Improved working practices
- Increased sales
- Product Development
- Supplier Relations
- Networking/ collaboration
- Productivity
- Improved administrative/strategic processes
- Health and safety procedures
- Environmental performance
- Marketing functions (including sales and PR)
- Employee loyalty
- Employment/staffing procedures
- Production processes
- Other (Please specify)

Q12 Approximately, how many of the workshop topics listed in Q1 would you wish to attend in future?

.....(no. of workshops)

Q13 Do you have any recommendations for future workshop topics? Please specify...

Q14 Do you have any suggestions as to how future workshops/ best practice visits may be improved

(e.g. in terms of locations, timings, length, number of participants, quality of training delivery and other relevant variables)

Q15 Do you feel that the cost of workshops/ best practice visits is reasonable?

Yes No

Q16 Please add any further comments you have relating to the Market Advantage Programme

**Many thanks for completing this survey questionnaire.
All responses will be strictly confidential and will be used in aggregated format only.**

Appendix B
Market Advantage Programme: Participant Business Survey

Company Name _____

Line of Business/Sector _____

Location (e.g. Grampian, Ayrshire) _____

Number of employees _____

Position of Respondent _____

Q1 Please indicate how many of your employees have participated in the Market Advantage Programme’s workshops or best practice visits.

No. of workshops/ best practice visits	1	2	3	More than 3
No. of employees involved				

Q2 Based on your company’s experience, how satisfied are you with the Market Advantage Programme overall?

Very satisfied	Somewhat satisfied	Neither Satisfied nor dissatisfied	Somewhat dissatisfied	Very dissatisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q3 Based on your company’s experience, how likely would you be to continue to use the Programme services in the foreseeable future?

Definitely would	Probably would	Might or might not	Probably would not	Definitely would not
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q4 Based on your overall experience, how likely are you to recommend the Programme to others?

Definitely would	Probably would	Might or might not	Probably would not	Definitely would not
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q5 To what extent have any of the skills and knowledge gained from the participation of your staff in the Programme been implemented in your business?

Significantly	Somewhat	Not at all
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q6 In your view, to what extent has your business benefited from your involvement in the Programme?

Significantly	Somewhat	Not at all
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q7 Please indicate areas in which you feel your business has benefited from it's involvement with the Programme.

- Cost savings
- Improved working practices
- Increased sales
- Product Development
- Supplier Relations
- Networking/ collaboration
- Productivity
- Improved administrative/strategic processes
- Health and safety procedures
- Environmental performance
- Marketing functions (including sales and PR)
- Employee loyalty
- Employment/staffing procedures
- Production processes
- Other (Please specify)

Q8. Could you please give an indication of the total financial benefits your businesses has realised from involvement in the Market Advantage Programme to date?

£.....

Q9 As a result of your business's involvement with the Programme to date, could you please give an indication of the total financial benefits your business expects to realise over the next three years?

£.....

Q10 Could you please indicate any impact that involvement in the Market Advantage Programme has had on the numbers employed in your business?

i.e. Increase in employment (in full-time equivalents i.e. 35 hours per week)

Number of jobs sustained..... Number of jobs created.....

Q11 To what extent has the Market Advantage Programme influenced any skill deficiencies within your workforce?

- | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Extremely Positively | Positively | No effect | Negatively | Extremely Negatively |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q12 To what extent has the Market Advantage Programme influenced the motivation/ attitude of those staff that have participated?

- | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Extremely Positively | Positively | No effect | Negatively | Extremely Negatively |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q13 Would you be willing to pay for your staff to participate in future workshops/ best practice visits?

Yes No

Q14 Do you have any suggestions as to how future workshops/ best practice visits may be improved

(e.g. in terms of locations, timings, length, number of participants, quality of training delivery and other relevant variables)

Q15 Do you feel that the cost of workshops/ best practice visits is reasonable?

Yes No

Q16 Please add any further comments you have relating to the Market Advantage Programme

**Many thanks for completing this survey questionnaire.
All responses will be strictly confidential and will be used in aggregated format only.**

Appendix C
Market Advantage Programme: Non-Participant Business Survey

Company Name _____

Line of Business/Sector _____

Location (e.g. Grampian, Ayrshire) _____

Number of employees _____

Position of Respondent _____

Q1 Are you aware of the services provided under the Scottish Enterprise Market Advantage Programme?

- Yes Go to Q2
 No Go to Q4

Q2 Please indicate why you have decided not to make use of the Market Advantage Programme services.

Because my company has already instigated action along the lines offered by the Programme

Because of constraints on company resources

Please specify the nature of these constraints

Because we consider that participation in this Programme will not provide the type/level of support and advice required.

Please specify the nature of the assistance you might require

Other
Please specify

Q3 Would you like to receive information on future Market Advantage Programme workshops and best practice visits?

- Yes No

Please go to Q7.

Q4 Please indicate how likely it is that your business would be interested in the following Programme activities? (please ✓)

Workshops	Definitely would	Probably would	Might or might not	Probably would not	Definitely would not
Direct Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Market Research & Competitive Intelligence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exhibition Skills & Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telemarketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advertising & Promotion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Product Development & Pricing Strategy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Negotiation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Introduction to Category Mgmt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approaching the Catering/ Foodservice Market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approaching the Retail Multiples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Key Account Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Introduction to ECR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relationship Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Management for Profit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowing Your Consumer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Strategy for Small Businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(cont.)

Best Practice Visits	Definitely would	Probably would	Might or might not	Probably would not	Definitely would not
i.e. to other businesses in the Food & Drink Sector	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q5 Please identify any additional workshop topics that would be of particular interest to your business.

Q6 Would you be willing to pay for your staff to participate in future workshops/ best practice visits?

Yes No

Q7. Please add any further comments you have relating to the Market Advantage Programme

**Many thanks for completing this questionnaire.
All responses will be strictly confidential and will be used in aggregated format only.**