EVALUATION OF THE SOUTH EAST BUSINESS HUB

A Report to the South East Local Enterprise Partnership (SELEP) - June 2019

Contents

Proposal Cover: The Truth Studio, Sheffield.

EXECUTIVE SUMMARY

This is an evaluation of the South East Business Hub ('The Growth Hub'). The South East Business Hub (SEBH) was created to simplify the offer for businesses acting as a focal point for business support. SEBH operates a Federated Model comprised of three hubs: Business Essex, Southend and Thurrock (BEST), Business East Sussex (BES) and Kent & Medway (K&M) Growth Hub ('the hubs'). Building on earlier evaluation this report provides a periodic review covering the period from April 2018 to March 2019.

CONTEXT

The purpose of the evaluation is to help to ensure the SEBH, which comprises of three hubs, is able to continue to track progress effectively, make the most of limited resources by targeting businesses with genuine growth prospects and, most importantly, help meet the LEP's economic growth and productivity ambitions. The evaluation involved a review of progress to date, discussions with stakeholders, a business survey, case studies and a review of monitoring and evaluation arrangements. Chapter 1.0 describes the approach in more detail.

Growth Hubs were introduced for two principle reasons. Firstly, they aim to address a market failure of businesses not knowing where to go for support. Secondly, they were designed to simplify what has become a confusing and fragmented picture of business support.

The SEBH concept fits well with "Smarter, Faster Together", SELEP's Economic Strategy Statement which notes "*with employment levels high – particularly across the South East – the challenge of securing our future prosperity depends less on getting people into work, than on increasing the value of the work we do*". By working 'smarter' SELEP aspires to translating impressive jobs and business growth into a long-term increase in productivity.

The UK's decision to leave the European Union (EU) will result in the loss of some regional business support funding and provides an opportunity to explore a domestic successor/local funds.

THE DELIVERY MODEL

The SEBH is founded on a core service offer of a Business Information Portal and Business Navigators. The Portal is a one-stop shop for businesses looking for information and support. The focus of the SEBH is on improving information flows, linkages and quality across business support services in each SELEP local area driving behaviours in the business support sector to make the market work more efficiently and effectively by providing impartial information to business about the services available and providing better coordination of existing offers.

PERFORMANCE

The following table indicates that for the year ending the 31st of March 2019, 4,426 companies had received support with two-thirds (67.6%) benefiting from light touch support (up to 3 hours), 28.8% receiving medium intensity and 3.6% benefiting from above 12 hours of high-intensity support. The 4,426 companies represent 2.8% of the business base (156,400) in the SELEP area.

Number of Beneficiary Companies		
Enquiries supported	SELEP Total	
Light touch	2,994	67.6%
Medium Intensity	1,273	28.8%
High Intensity	159	3.6%
Total	4,426	100.0%

Source: Hub Databases, 2018/19

The main advice areas that businesses sought were financial assistance (2,778), growth and management (2,122) and starting a new business (999). Other advice requested included skills and recruitment (428), legal advice (257), sales and marketing (235), IT (195), premises (115) and imports and exports (67). The importance of access to finance as part of any support offer was clear representing 39% of all enquiries.

In terms of employee size-bands, 88.6% of the SME company beneficiaries were micro businesses which is representative of the SME share of all businesses in the SELEP (90.2%) area and national figures (89.8%). The number of unique website visitors to the three sites totalled 41,851 over the course of the year.

BUSINESS HEADLINES

- 70% of all light touch (LT) and 86% of the medium and high (M&H) intensity assisted business respondents were 'very satisfied' or 'somewhat satisfied' with their experience of the support.
- When asked to rate the knowledge and experience of the advisers the businesses came into contact with, medium and high intensity firms scored the hubs higher than the light touch firms on every element measured. Friendliness (95% M&H, 77% LT), professionalism (93% M&H, 73% LT), and understanding requirements (87% M&H, 58% LT) were the highest scoring ratings.
- Three quarters (74%) of the light touch sample reported that they would 'very likely' or 'likely' recommend their local hub to a friend or colleague.
- 85% of the medium and high intensity businesses are 'much more likely' or 'more likely' to engage with business support in the future, compared with 68% for light touch firms.
- The hub support appears to have provided medium and high intensity businesses with more confidence to achieve their growth aspirations (85%).
- The referral process scored highly for all four categories of speed, relevance, ability and quality for both the referral and the organisation the business was referred to. Rating of 'very good' or 'good' were all above 72% by both light touch and medium/high intensity.
- When asked about the ease or difficulty of finding information about business support, the majority of all respondents had similar responses with the majority finding information about business support neither easy nor difficult to find.
- 88% of medium and high intensity respondents think it would have taken them longer to find support without the hub.
- 41% of medium and high intensity firms reported improved business confidence already. 59% have or will increase profit as a result of the support and 65% will increase turnover.
- There is a low level of reported deadweight which is encouraging.
- 46% of medium and high intensity firms have create 0.5 Full Time Equivalent (FTE) posts or more as result of the support. The average number of jobs created to date is 1.2 FTE. 61% of medium

and high intensity firms intend to create a job or part thereof in the next 12 months. The average number of additional jobs anticipated is 1.4 FTEs.

DELIVERY HEADLINES

- The Federated Model makes sense with SELEP offering additional weight and ensuring consistent provision across a very large geographical area and can cope with the nuances of local need and delivery. The delivery model is rooted in the local economic landscape.
- All areas have been very proactive in co-ordinating local activity and created steering groups to monitor performance and share information. The relationship between the hubs and local authorities is working well and this has improved over time. Integration with the South East Business Boost (SEBB) has been excellent.
- The relationship with national and local partners has deepened considerably in the last 12 months. Links with IUK, Catapults, Better Business for All and Be the Business team could be improved.
- The visibility of University and partner business support expertise and events including the Department of International Trade (DIT) and Federation of Small Businesses (FSB) could be significantly enhanced.
- Live Chat is a quick and easy entry point into hub services, offering triage enquiries and can establish initial trust. There is a need to consider how this technology can be used in future.
- There was a sense more value added could be realised through joint working.
- There are differences in the way business support data is captured which needs addressing.
- There's been a step change in the service offer but there is scope for more investment readiness support.
- The hubs would welcome more feedback from providers that have been referred to.
- The overall awareness of the SEBH could be higher amongst the business community. A consistent 'drip feeding' of key marketing messages is required to help boost awareness levels.
- There were multiple examples quoted of sharing information about and attending networking events but there is scope for more promotion across hubs and with wider stakeholders.
- The current shift to a central website makes sense from a co-ordination perspective provided local distinctiveness is not lost.
- Stakeholders involved in steering groups and the management of the SEBH recognised the challenges of developing and delivering the service in the face of changes by central Government.
- There was also an appetite from the three hubs to work more closely together in the coming 12 months.
- The hubs hold an Annual Showcase of Business Support Providers which have been well received by local stakeholders and businesses alike.
- There has been a push to understand the impact of the SEBH more widely.

REVIEW OF 2018 RECOMMENDATIONS

The previous evaluation suggested there should be 'careful consideration as to how the new BEIS business data collection requirements are met (Monitoring and Evaluation Framework for Growth Hubs

– 2018/19)'. It noted that the SEBH has struggled to a certain extent with robust data collection. The situation has improved but there is scope for further enhancements to ensure greater consistency (see recommendations). The previous report asked for a review of scaleup support in light of new BEIS priorities. There has been good progress here with each hub addressing this issue head on with new pilots. There was a recommendation about the provision of Brexit support for vulnerable sectors. Brexit resources have been available on all three hub websites and regularly updated. That said it was claimed there was scope for further staff training (see recommendations). The final recommendation was to consider if there are alternative options to secure the longer-term resourcing of the SEBH or elements of it. South East Business Boots (SEBB) 2 is being pursued and there may be scope from some ERDF follow-on resources but there is more to be done here (see recommendations).

CONCLUSION

The SEBH has considerable geographical reach, strong stakeholder relations and wide publicity of local services in each area. Overall the Federated Model has enabled a dedicated local service to be established in each of the three areas within the SELEP area. The benefits recognised included the ability to provide a staffed service with local, hands-on knowledge that local businesses can directly interact with. The next phase of its development should be to maximise the sum of its parts – aligning measurement and resources, and sharing networking, expertise and company intelligence.

RECOMMENDATIONS

In light of the evaluation findings partners may wish to consider the following:

(a) Operational recommendations.

- Encourage partners such as libraries and the FSB to advertise their events on the hub websites free of charge.
- More joint events between the three hubs and more routine cross referral (could the Kent Investor Network be introduced to more prospects elsewhere in the SELEP area?).
- Ensure all three CRM systems are fully aligned.
- Consider new ways to better engage young people, women and ethnic minorities.
- A cross hub marketing plan with appropriate measures and activities to deepen awareness of the brand.
- Training for the SEBH Navigators on helping firms prepare for Brexit.
- More routine aftercare and follow-up.

(b) Strategic recommendations.

- Formalising the SEBH steering group so it directs its efforts towards the collective interests of the SELEP cascading intelligence from all three hubs.
- Using the above to report back on links with national providers to ensure all hubs benefit.

- Deepen links with IUK, Catapults[1], Better Business for All and Be the Business team.
- How the visibility of University and partner business support expertise and events including DIT and FSB could be significantly enhanced.
- Measures to simplify the skills, training and apprenticeships market.
- Lobbying for new resources from the Shared Prosperity Fund and other sources for a new SEBH investment readiness product, SEBB2 and funds to boost the number and capacity of Business Navigators.
- Reflecting on the scaleup pilots, working with The ScaleUp Institute and developing a SELEP wide scaleup programme.
- Engage hubs in the development of the Local Industrial Strategy.

(c) Recommendations on the future monitoring and evaluation.

- Plan for the annual evaluation 2-3 months in advance to allow sufficient time to conduct company surveys, case studies etc.
- How KPIs and monitoring data can be collated much more consistently between the three areas.
  - Although locational data has been made available, this has been collected at the level of towns and other small geographies. These are not formal boundaries such as local authority districts which would make the task of knowing whether areas are adequately supported more difficult.
  - A more clear and consistent method on data collection on sectors is needed by using an agreed level of a standard industrial classification.
  - Enquiry collection methods have varied across the three hubs. These need to be aligned to ensure the hours for each enquiry are recorded consistently.
  - The description of the type of enquiries or advice given (e.g. funding, IT, marketing etc.) should be clearly defined with all three hubs using identical categories.
  - The turnover ranges for companies should be collected consistently. This should be in line with BEIS requirements.
- Whether there is scope to simplify the sharing of company data for evaluation purposes.
- Plan in scaleup impacts to the 2019-2020 evaluation.

[1] Target catapults should be aligned with the Enterprise Zones' industrial specialisms e.g. Off-Shore Renewable Energy, Medicine Discovery and High Value Manufacturing.

South East Business Hub (SEBH)
in Numbers

Impact

994
Gross jobs
(795 direct, 199 indirect)

£11.5m
NPV GVA

£1.00:£13.20
Return on investment

£607
Unit cost per business supported

59%
Have or will increase turnover

48%
Medium and high intensity firms created jobs already
(61% Will do in the next12 months)

83%
Medium and high intensity firms report some form of additionality
(Time, scale, pure additionality etc)

£1,094
Unit cost per gross job

Service

93%
Medium and high rate professionalism as very good or good
(73% LT)

87%
Medium and high rate understanding of their requirement as very good or good
(68% LT)

86%
Satisfied with quality of service
(70% LT)

85%
Medium and high intensity businesses increased confidence in achieving their aspirations

Business Reach

84%
Medium and high referrals rated as very good or good
(72% LT)

85%
Medium and high intensity likely to engage with business support in future
(68% LT)

74%
Light touch likely or very likely to recommend Growth Hub

92%
Medium and high intensity would not have accessed or taken longer to access support without the hub
(70% LT)

1. INTRODUCTION AND APPROACH

Kada Research was commissioned to undertake an evaluation of the South East Business Hub (SEBH) – the Growth Hub for the South East Local Enterprise Partnership (SELEP). The study builds on earlier evaluations and covers the period from April 2018 to March 2019. This first Chapter sets the scene.

THE CONTEXT FOR THE SERVICE

After the demise of the Business Link service, and prior to the establishment of Growth Hubs, the provision of business support was somewhat fragmented with many businesses stating that they did not know where to go for support. The proliferation of organisations offering different types of support can cause confusion. The Government sought to address this by supporting the development of Growth Hubs offering a central repository and single point of access for information, advice and support within a local area, providing a holistic approach.

The SEBH concept fits well with "Smarter, Faster Together", SELEP's Economic Strategy Statement which notes

"with employment levels high – particularly across the South East – the challenge of securing our future prosperity depends less on getting people into work, than on increasing the value of the work we do".

By working 'smarter' SELEP aspires to translating impressive jobs and business growth into a long-term increase in productivity.

At the national level there has been a shift from light touch to scaleup[2] support. The Industrial Strategy White Paper focuses throughout on the value of scaleups which are recognised as part of the solution to the productivity challenges. Launched as part of the Industrial Strategy, the Scaleup Taskforce aims to increase the number of businesses expanding their operations. The focus is on helping high-growth businesses to reach their full potential both at home and overseas. The taskforce looks at barriers to small business growth across different regions and sectors.

"We are already a start-up nation and now the opportunity is to become a scaleup nation – by removing the barriers and creating an ecosystem to enable the entrepreneurs who had the grit and determination to start a business to capitalise on opportunities this new global networked world brings and grow their businesses to scale". Sahar Hashemi, Scaleup Taskforce Co-Chair and entrepreneur

THE MODEL

The focus of the SEBH is on improving information flows, linkages and quality across business support services in each SELEP local area driving behaviours in the business support sector to make the market

[2] A 'scaleup' is an enterprise that is experiencing significant growth rates in employees and turnover, over a number of years.

work more efficiently and effectively by providing impartial information to business about the services available and providing better coordination of existing offers.

The SEBH is founded on a core service offer of a Business Information Portal and Business Navigators. The portal is a one-stop shop for businesses looking for information and support.

The South East Business Hub (SEBH) is comprised of three hubs:

- Business Essex, Southend and Thurrock (BEST) is made up of 15 local authorities. The team includes a manager, a scaleup advisor, a partnerships co-ordinator, two Navigators, and a business engagement officer. It also has three ERDF funding South East Business Boost Advisors and an administrator. It is run in-house by Southend on-Sea Borough Council from the Hive Enterprise Centre.
- Business East Sussex (BES) is delivered by Let's Do Business Group on behalf of East Sussex County Council. It has six Business Navigators, a co-ordinator, an assistant, a business planning specialist, a triage Navigator and marketing specialist and an access to finance specialist.
- Kent & Medway (K&M) hub covers 13 local authority areas and is run by Kent Invicta Chamber of Commerce for Kent County Council. A Live Chat service (ask Phil) is staffed 9.00am to 5.30pm Monday to Friday and deals with enquiries from across the area.

All three services have local Navigators, a helpline and websites and Kent offers a web-chat service.

STUDY AIMS

The evaluation should assess:

- The long-term economic impact of the SEBH.
- Customer satisfaction of businesses who have used the SEBH services including those who have been signposted to external organisations and their satisfaction of this signposting.
- The impact of the scaleup support including customer feedback and future opportunities.
- Strategic partnership working and feedback from stakeholders.
- Progress against recommendations made in the 2018 evaluation.
- Recommendations for the future evaluation, informed by consultation with hub staff and relevant stakeholders and in accordance with the new 2019 framework.

APPROACH

As this is a periodic review, this evaluation reflects on the project's rationale, current operation and impact and performance of SEBH. It also looks at its future. The evaluation is 'framed' by an intervention logic with three principal evaluation strands.

1: Review Strategy & Delivery → 2: Assess Impact & Performance → 3: Distil Lessons to Inform Actions

The review began with an assessment of the project's rationale, that is, how it came about and what it is seeking to achieve. It subsequently assessed the progress of outputs and outcomes and has explored whether the business support landscape is easier to navigate. The evaluation looks at the performance of different levels or intensities of support and whether these lead to different outcomes. The study considers key lessons for strategic direction, operational delivery and evaluation including challenges and strengths to build on. Following an inception meeting with the team a desk review of the context, objectives and targets for the service was undertaken. Local stakeholders were then consulted (see Table) to appraise and assess the service.

SEBH Consultees and Meetings (March and April 2019)

Org	Name	Role
Maldon District Council	Heidi Turnbull	Economic Development Officer
Anglia Ruskin University	Carole Randall	Head Post Award and Commercialisation
Economic Growth Solutions	Sarah Goodwin	Manufacturing Growth Manager
Anglia Ruskin University	Julian Gibbs	Development and Engagement Officer
Chelmsford City Council	Helen Quinnell	Economic Development Officer
BEST Team Meeting	Various	Various
SEBB Team Meeting	Various	Various
BES Team Meeting	Various	Various
K&M Team Meeting	Various	Various
SEBH Team Meeting	Various	Various
K&M EDO Meeting	Various	Various
Alison Palmer	FSB	
Ana Christie	Sussex Chambers of Commerce	Chief Executive
Dan Shelley	East Sussex College Group	Executive Director Strategic Partnerships and Engagement
Gary Crooks	Thurrock Council	ERDF Business Manager, Place
Graham Peters	Business East Sussex	Chair
Ioni Sullivan	East Sussex County	GH Lead
Martin Searle	FSB	
Peter Sharp	Lewes District & Eastbourne Borough Councils	Head of Regeneration
Richard Dawson	East Sussex County Council	EDO
Janine Coomber	University of Kent	EIRA project
Tom Jenkins/Andrew Osborne	Ashford Council	EDOs
Iwona Bainbridge	Growth Hub Lead	SELEP

Primary research with beneficiaries was also conducted. It had several elements:

- An online survey of those engaging with the service on a light touch basis: 145 responses were received.
- An in-depth telephone survey of medium and high intensively support firms: with an additional 59 business beneficiaries to explore in further detail the good practice, areas for improvement and impacts.
- Three case studies: with different business to explore the support in more detail.

The next Chapter looks at the performance of the service focusing mainly on the last year or so.

2. PERFORMANCE SUMMARY

This Chapter provides an overview of programme expenditure, agreed outputs and performance measures were tracked by the hubs and SELEP and reported to BEIS.

EXPENDITURE

The programme secured £656,000 funding from BEIS for business support activities between April 2018 and March 2019. The funding was provided almost equally during each quarter (Q1 £152,948, Q2 £152,198, Q3 £171,117 and Q4 £179,737). The 2018/19 quarter four progress report to BEIS indicates that 100% of the allocated funding for April 2018 to March 2019 had been spent.

In addition, there was SELEP revenue funding earmarked for both 2018/19 and 2019/20 - £85,000 (total available for the two-year period). This funding is being used to make pan-LEP improvements and to bring the service up to the standards required by BEIS.

SEEDA Legacy Funding - £171,000 (2018/19) – is used to support the costs of operational hubs in the SEEDA legacy areas (i.e. south of the Thames), currently core funding does not cover the total costs.

Finally, there is funding available from SEEB and LoCASE.

BUSINESS ENQUIRIES AND INTERACTIONS

The SEBH has supported 4,426 growth businesses between 1 April 2018 and 31 March 2019, and this includes 170 businesses that have received high-intensity, in-depth, support from the Business Navigators. Light touch support equates up to and including 3 hours of assistance and advice. This might include attendance at an event or workshop or webinar attendance or referrals or checks for more intensive support. Medium intensity interventions include firms with over 3 to 12 hours of support; while high intensity interaction is over 12 hours of hub support or scaleup advisor support.

With three separate hubs in place, the method of data collection has varied. In setting up monitoring systems, each interpreted the guidance notes a little differently on enquiries. The result means that the interpretation and quantification of the enquiries was inconsistent. One company may have a number of enquiries on different topics. The hours are added together and classed as a single enquiry because they emanated from one organisation. Another approach would be a single company that may generate several enquires but this is treated as several enquiries. There has, however, been a genuine attempt by the three areas (BEST, BES and K&M) to resolve the data collection differences through a series of meetings, but with systems already established, the task has proved extremely difficult. Apart from the already embedded management information systems, data collection by the three areas was carried out by differing groups: in-house, or sub-contracted or both. Any changes would require each provider to make appropriate adjustments to the methods they had already began to use.

Consequently, the majority of the analysis has concentrated on the number of beneficiary companies rather than the number of enquiries. Annex 1 provides a more detailed breakdown of some of the analysis in this Chapter.

The following table indicates that for the year ending 31 March 2019, 4,426 companies had received support with two-thirds (67.6%) benefiting from light touch support, 28.8% receiving medium intensity and 3.6% benefiting from above 12 hours of high-intensity support. The 4,426 companies represent 2.8% of the business base (156,400) in the SELEP area.

Number of Beneficiary Companies		
Enquiries supported	SELEP Total	
Light touch	2,994	67.6%
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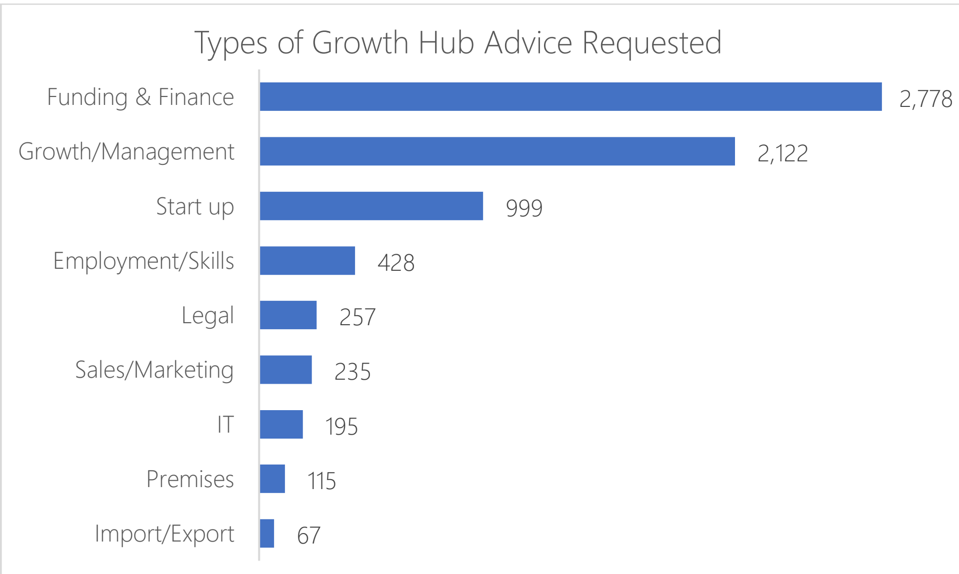
High Intensity	159	3.6%
Total	4,426	100.0%

Source: Hub Databases, 2018/19

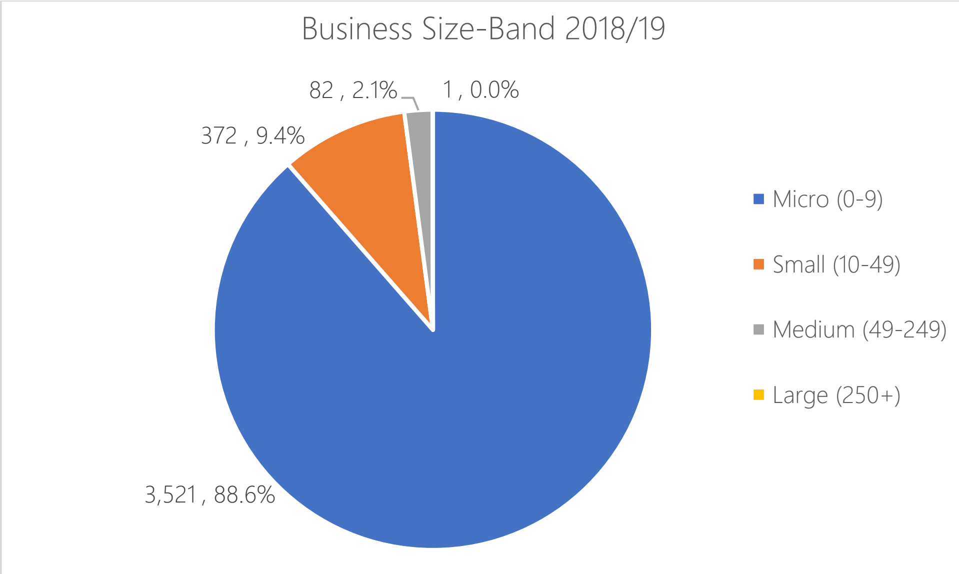
For individual areas (see Annex 1), BEST has delivered half (51%) of the company interventions at medium intensity and nearly 6% at high intensity. BES supported nearly three-quarters at light touch and a quarter at medium. K&M have delivered 83% of the companies supported at the light touch level. Hence BEST has concentrated on medium intensity support, while K&M have focused on light touch support.

The main advice that businesses sought were on financial assistance (2,778), growth and management (2,122) and starting a new business (999). Other advice requested included skills and recruitment (428), legal advice (257), sales and marketing (235), IT (195), premises (115) and imports and exports (67). The importance of access to finance as part of any support offer was clear accounting for 39% of all enquiries. It was however not clear whether the advice provided was categorised consistently across the three areas. The amount of advice categories ranged from 6 to 23 across the three areas. The research team has therefore taken an executive decision to interpret, collapse or merge the data into the nine groups of advice indicated in the following chart. Advice on growth, for example, may include company structure, business planning, mentoring and even help with funding. (Therefore, the chart will contain inaccuracies.)



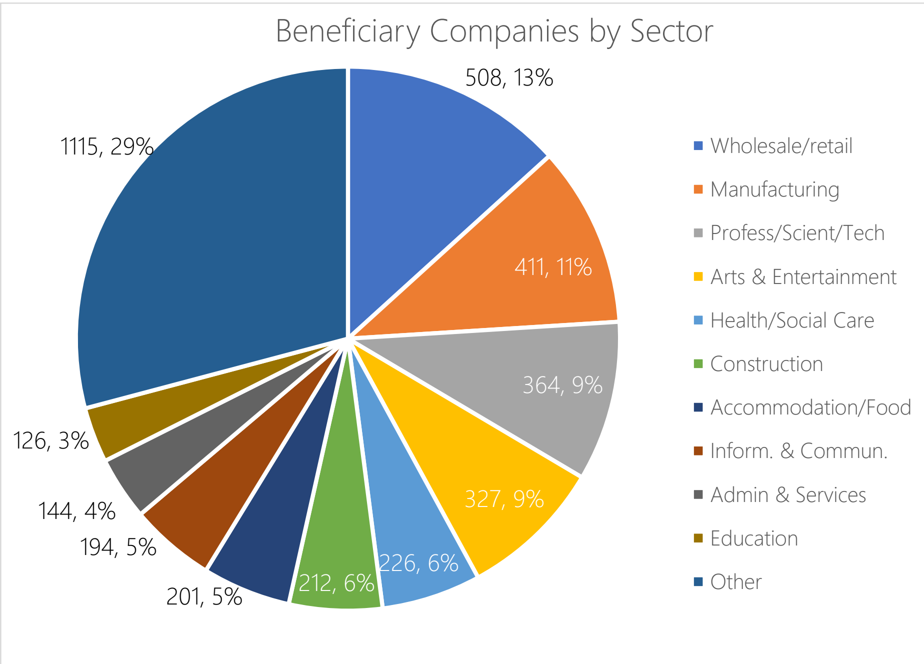
Source: Hub Databases, 2018/19 (n=7,048)

In terms of employee size-bands, the next chart shows 88.6% of the SME company beneficiaries were micro businesses which is representative of the SME share of all businesses in the SELEP (90.2%) area and national figures (89.8%). Small and medium sized enterprises were also representative. A table breakdown by area is provided in Annex 1.



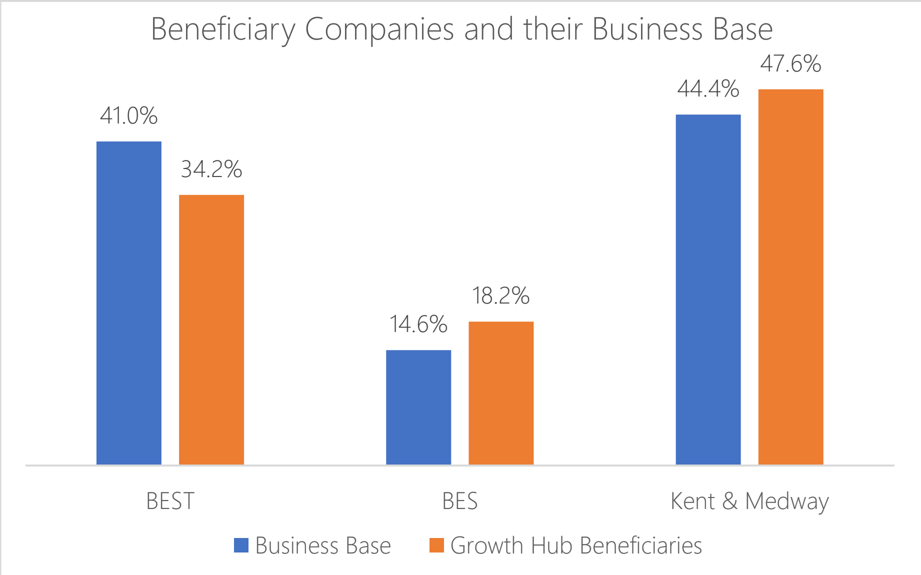
Source: Hub Databases 2018/19 (n=3,976)

The following chart provides a breakdown of sectors engaged in the programme. Wholesale and retail account for 13% of all beneficiary companies followed by manufacturing (11%), professional, scientific and technical (9%) and arts and entertainment (9%). A more comprehensive list is provided in Annex 1.



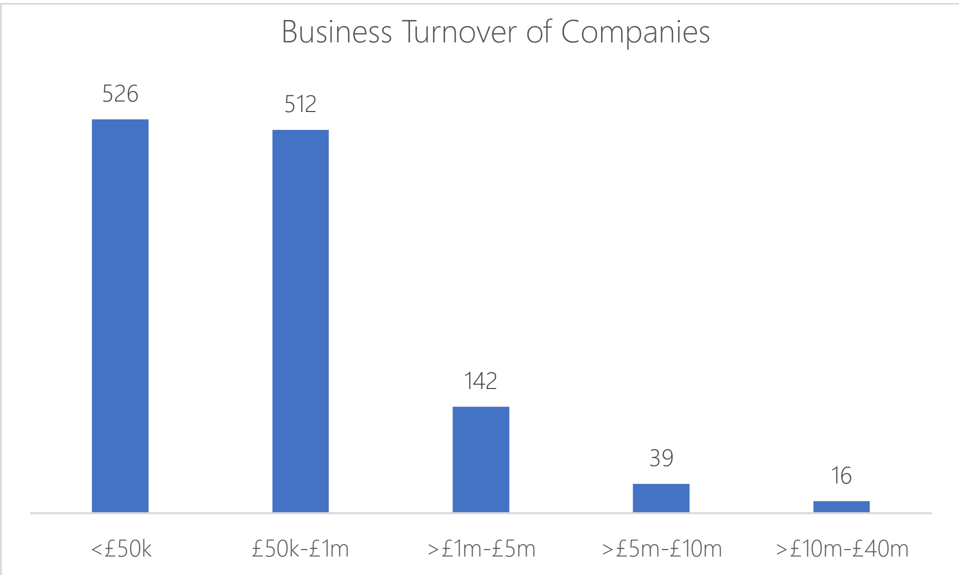
Source: Hub Databases 2018/19 (n=3,976)

The next figure provides a comparison between the size of the business base in each of the three areas and the proportion of assistance received. The share of beneficiary companies in each of the three hub-areas is roughly in line with the proportion of all business in the SELEP economy. BEST is only slightly underrepresented, while the other two areas have a higher number of businesses supported than their share of the SELEP business base.



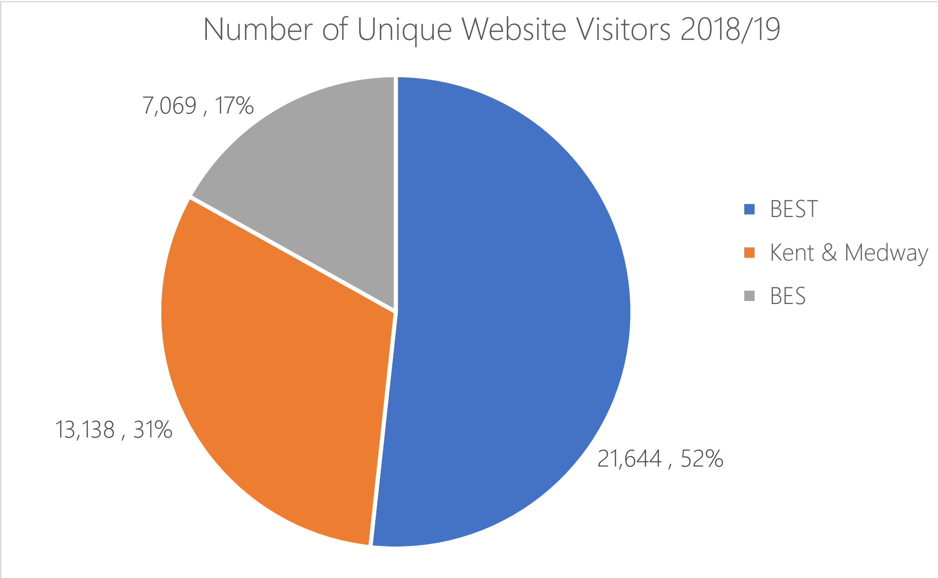
Source: Hub Databases, 2018/19, (n=4,426), Business Count 2018

Information on business turnover is incomplete because it was not always collected for enquiries at the light touch level. Based on information that is available, turnover under £1m accounted for 84% of the businesses. There were also 16 medium sized enterprise with a turnover in excess of £10m.



Source: Hub Databases, 2018/19 (n=1,235)

The number of unique website visitors to the three sites totalled 41,851 over the course of the year.



Source: Hub Databases, 2018/19, (n=41,851)

Analysis of all the data collected by the three hub areas has not been possible because either the information is collected inconsistently or incomplete. Therefore, a breakdown of enquiries, hours of support and referrals has not been possible.

The next Chapter explores the views of SELEP beneficiary businesses that were surveyed.

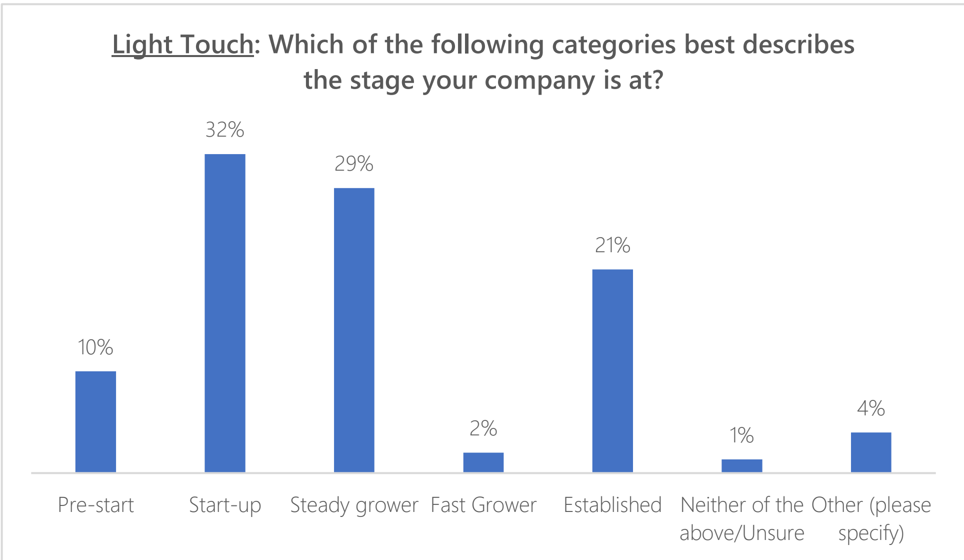
3. BUSINESS PERSPECTIVES: MOTIVATIONS AND SATISFACTION

The survey sought to understand business satisfaction amongst companies receiving assistance, the impacts that have or could be achieved, and what areas of future support might be required.

This Chapter presents findings from the online and telephone surveys. For light touch companies the research team used an online survey, and a telephone interview for the medium intensity and high intensity businesses. The sample size for the light touch supported businesses was 145, and for medium and high intensity it was 59. The surveys took place between March and April 2019.

PROFILE OF RESPONDENT BUSINESSES

Light touch businesses maturity at the point of intervention is highlighted in the chart below. It shows a higher concentration of businesses at the earlier stages of maturity.



Source: KADA Business Survey 2019 (n=145)

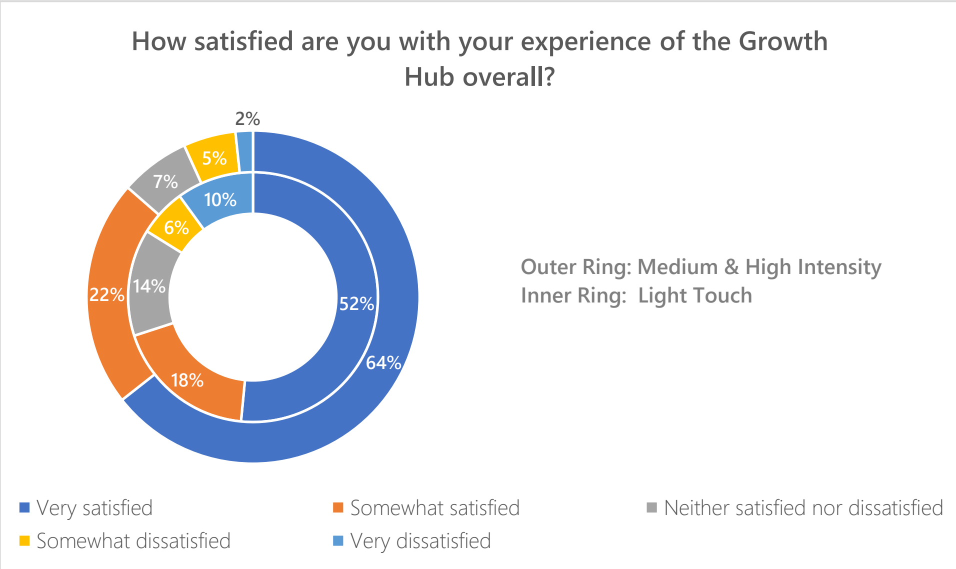
The next chart shows which areas of advice and support the businesses were looking for or interested in when they made enquiries with their hubs. Both surveys identified that funding and finance was the most important enquiry, followed by business growth, start-ups and skills and training (mirroring the performance analysis in the previous Chapter). Energy/efficiency and high growth support were lower down the priority list.

	Light Touch		Medium & High Intensity		Total	
	n	%	n	%	n	%
Business finance / loans / grants	74	56.9%	51	86.4%	**125**	**66.1%**
Business growth advice and support	41	31.5%	36	61.0%	**77**	**40.7%**
Business start-up advice and support	39	30.0%	19	32.2%	**58**	**30.7%**
Skills and training	35	26.9%	15	25.4%	**50**	**26.5%**
Innovation / new products / new processes / R&D	6	4.6%	14	23.7%	**20**	**10.6%**
Broadband, IT and digital support	7	5.4%	9	15.3%	**16**	**8.5%**
Other (please specify)	11	8.5%	5	8.5%	**16**	**8.5%**
International trade and exporting	6	4.6%	8	13.6%	**14**	**7.4%**
High growth support	3	2.3%	7	11.9%	**10**	**5.3%**
Energy and resource efficiency support	3	2.3%	6	10.2%	**9**	**4.8%**
Nothing specific / General advice	9	6.9%	0	0.0%	**9**	**4.8%**
Not applicable	1	0.8%	0	0.0%	**1**	**0.5%**
Don't know	0	0.0%	0	0.0%	**0**	**0.0%**

Source: KADA Business Survey 2019 (n=189)

SATISFACTION

Overall, 70% of all light touch respondents were 'very satisfied' or 'somewhat satisfied' with their experience of the Growth Hub business support (illustrated in the inner ring). This compares with 86% of the medium or high intensity assisted business respondents (the outer ring).



Source: KADA Business Survey 2019 (Light Touch n=130, Medium & High Intensity n=59)

Light Touch Qualitative Comments: Light touch beneficiaries who were surveyed were given the opportunity to comment on the service they received. With up to three hours of support, much of it was based only the advice and training they received within that shorter timescale. There were 37 of the 57 (65%) respondents with comments who said they were satisfied with the support they received and 19% who were dissatisfied. The qualitative feedback and ratings from beneficiary companies from the online survey are grouped and illustrated in the following table.

Light Touch Support Comments from Beneficiary Companies						
	Very Satisfied	Somewhat Satisfied	Neither Sat/Dissat.	Somewhat Dissatisfied	Very Dissatisfied	Total
Advice and Professionalism	25	5				30
Adviser didn't understand need or inappropriate advice			5	4		9
Lack of follow up support	1	3	2		2	8
Self-promotion (SELEP)					2	2
More hours wanted					2	2
Other	1	2	2	1		6
Total	27	10	9	5	6	57

The highest number of comments were positive observations on the quality of the advice and the professionalism of the advisors, all of which were reported as very satisfied or somewhat satisfied (30 citations). This represented over half of the comments.

"The growth hub provided our company with professional, accurate advice. The Navigators especially were very efficient in organising the training we required."

"It fulfilled my requirements and met my expectations. It gave me good insights to future planning to begin to draw up a business plan. The facilitator was knowledgeable approachable and friendly."

"The adviser was really interested in my business and I felt he was trustworthy, reliable and was there to help me."

Some were either less satisfied with the advice provided, although were generally happy with the adviser; or were unhappy about the process because they did not get what they wanted (9 citations).

"I was given the wrong information and directed towards a source of assistance, which then precluded me from pursuing the source of help I was originally interested in. I was then ignored."

"I wanted to diversify and was very clear on what direction I wanted and explained this at the beginning - online marketing and social media, nothing more. I wasted time doing pointless exercises on the financial breakdown of my business. I never got the help I wanted so in the end I paid someone else to do it. I know the representative needed to get to know my business, but I just needed someone to do what I asked."

Some wanted more follow up support in terms of hours received (2 citations) and complained that they did not get it because of the time allocation, while others felt abandoned after the initial help (8 citations).

"After my initial contact with the efficient receptionist, no one contacted me. I chased it up and requested an appointment and there was simply no response, other than from the very good receptionist!"

"Funding was cut half-way through the process, so I did not get the full number of hours originally offered. The time were spent discussing what we needed but no action was taken which ended up being a waste of everyone's time and money."

Two of the companies felt that the programme was largely a self-promotion exercise for the hub and were not designed to help the businesses.

There was also a mixture of largely positive individual comments including the fact that the support was free, helped to set up the business to succeed, and promoted a sense of confidence to deal with their needs.

"I feel like my business is really going to change and grow since attending the first meeting."

"I was given confidence in my idea and straightforward steps to help me without it feeling overwhelming."

Medium and High Intensity Qualitative Comments: Medium and high intensity beneficiary businesses surveyed comments on the service were conducted by telephone interview. They received a longer and wider level of support than the light touch beneficiaries on areas such as grants, business planning and marketing. 51 out of 59 respondents (86%) from the interviews reported that they were satisfied with the support they received and only 4 (7%) said they were dissatisfied. This indicates that the longer provision of the medium and high intensity support pushed the satisfaction scores up by a third. The qualitative feedback and ratings from the interview comments are grouped together in the following table.

Medium and High Intensity Support Comments from Beneficiary Companies						
	Very Satisfied	Somewhat Satisfied	Neither Sat/Dissat.	Somewhat Dissatisfied	Very Dissatisfied	Total
Grants, finance and loans	14	6	2	2		24
Advice	11	5	2		1	19
Service Delivery	7	1			1	9
Business Planning	3					3
Marketing	2					2
Training and new markets	2					2
Total	39	12	4	2	2	59

The highest number of comments were 24 from those who received help with grant applications, loans and other financial comments:

"We clearly outlined the opportunities available to us with funding from the SEBB programme, local grants, Keep + programme and international trade support. Since then we were given an award as an export champion."

"They've been very good at accessing European funding. They've been very good at organising the ice2seas. It's an initiative for various sectors including food and drink to connect us with our counterparts in Europe".

"We haven't got the money yet. We applied and by the time everything went through the pot was empty because the application was difficult to complete and took too long to process. We are currently applying again."

There were similar comments to those for light touch on the quality of advice received. These were largely positive with 16 of the 19 reporting that they were satisfied with the support. One reported that as a direct result of the programme they were able to create job opportunities:

"We asked for help to enable expansion of the business. They listened to us. Since then we have expanded again and have taken on new employees and an apprentice which we couldn't have done without their help."

It also helped companies to broaden their understanding of what was available.

"They went beyond what we were asking help for and engaged us to broaden our horizons. They made us realise what we were missing and what we need. The interaction with them made us realise what we could achieve."

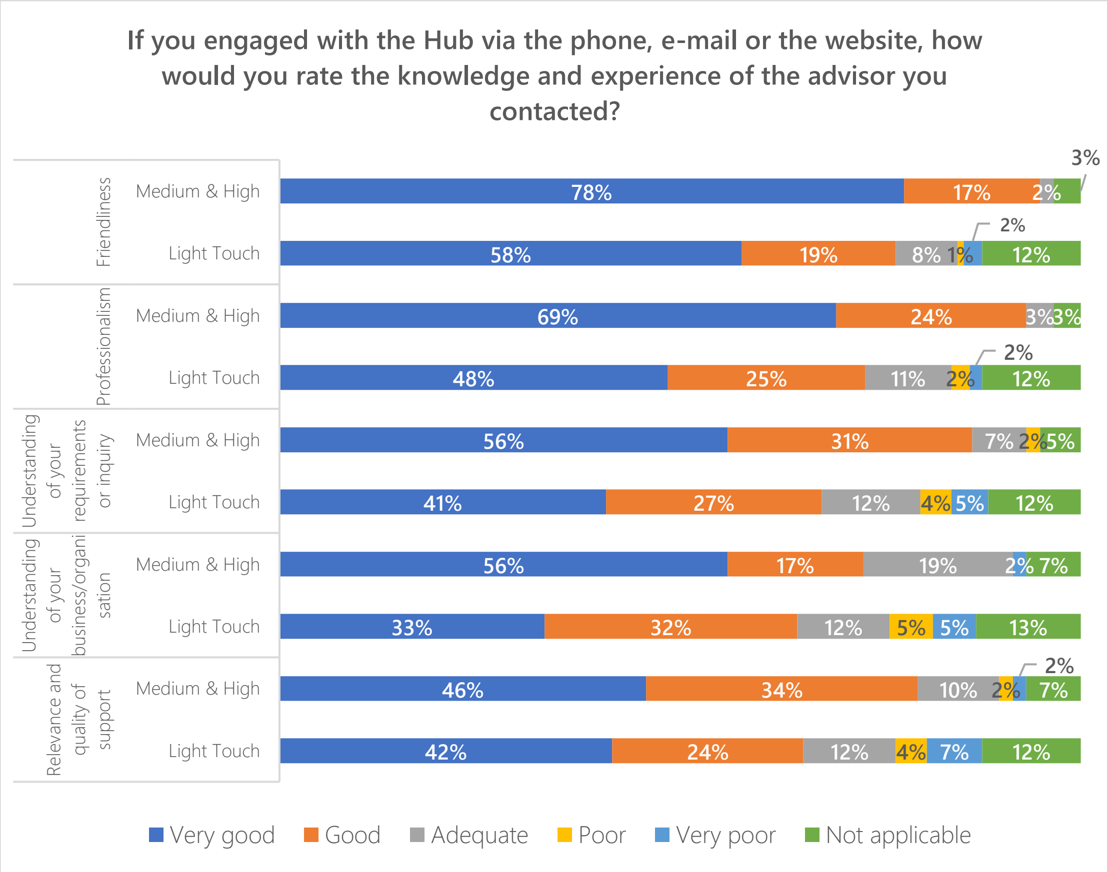
Some reported on the delivery of the service (9 comments) by the programme and the back-up team:

"I was hoping to get much more out of it than I did. I was after advice about grants and funding for consultancies I was hoping they could pay for. I had high expectations, but it wasn't delivered."

"They were very personable and understood my needs. They were responsive, available and provided continuity throughout the process."

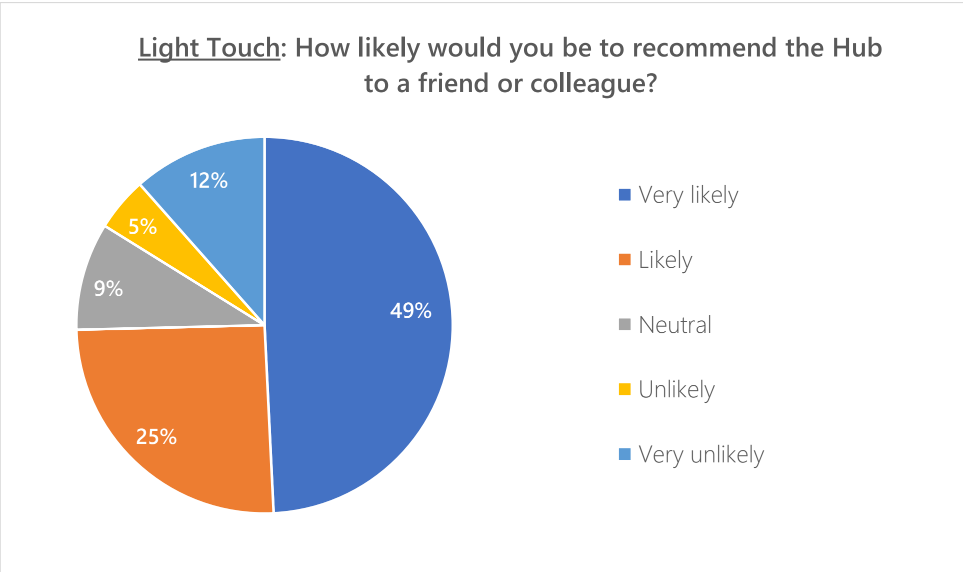
Other qualitative comments from the interviews of the medium and high intensity beneficiary companies included support on marketing, business planning, training and identifying new markets.

When asked to rate the knowledge and experience of the advisers the businesses came into contact with, medium and high intensity firms scored the hubs higher than the light touch firms on every indication provided. Although there were two survey methods used, this is likely to be because of the higher level of support received by those companies. All five categories of friendliness, professionalism, understanding of the requirements and the business and quality of support all reported that the support was either very good or good in 65% of the cases. Friendliness (95% M&H, 77% LT), professionalism (93% M&H, 73% LT), and understanding requirements (87% M&H, 58%) were the highest scoring ratings.



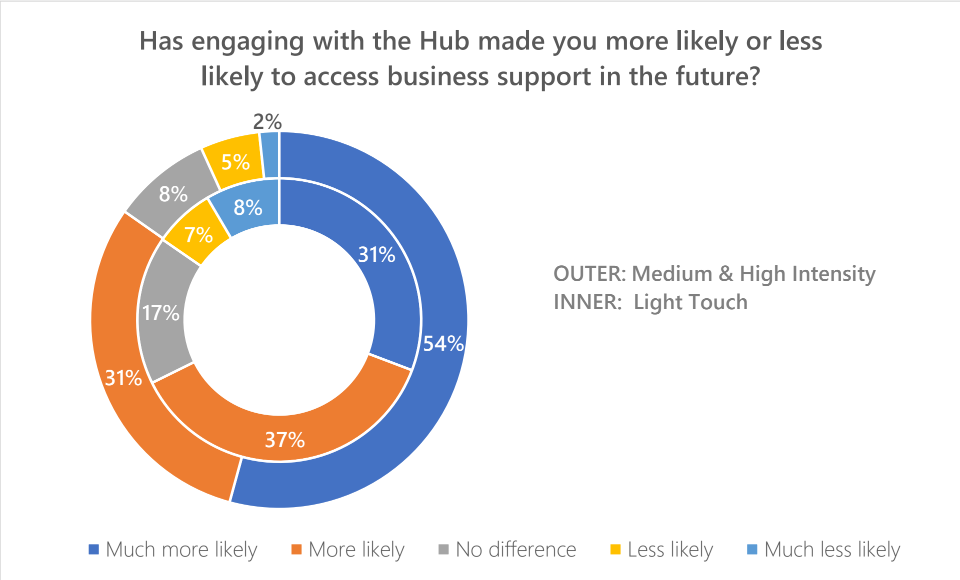
Source: KADA Business Survey 2019 (Light Touch n=130, Medium & High Intensity n=59)

Three quarters (74%) of the light touch sample reported that they would 'very likely' or 'likely' recommend their local hub to a friend or colleague.



Source: KADA Business Survey 2019 (Light Touch n=130)

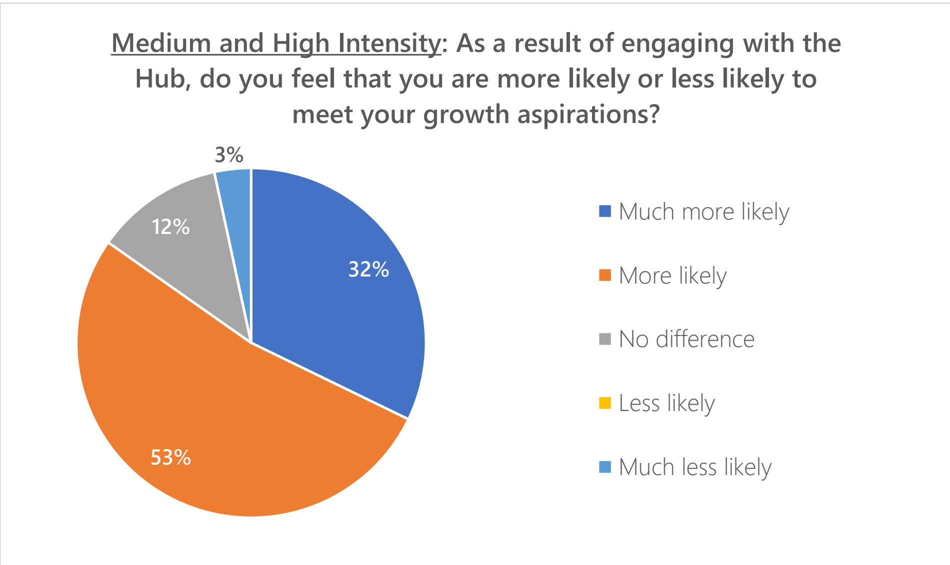
85% of the medium and high intensity businesses are 'much more likely' or 'more likely' to engage with business support in the future, compared with 68% for light touch firms. The businesses who receive higher levels of intensity clearly appreciate the value of the support more and would access business support again. Of the medium and high intensity firms only 2% said they were 'much less likely' to access business support in the future compared to 8% for light touch firms.



Source: KADA Business Survey 2019 (Light Touch n=130, Medium & High Intensity n=59)

ACHIEVEMENTS

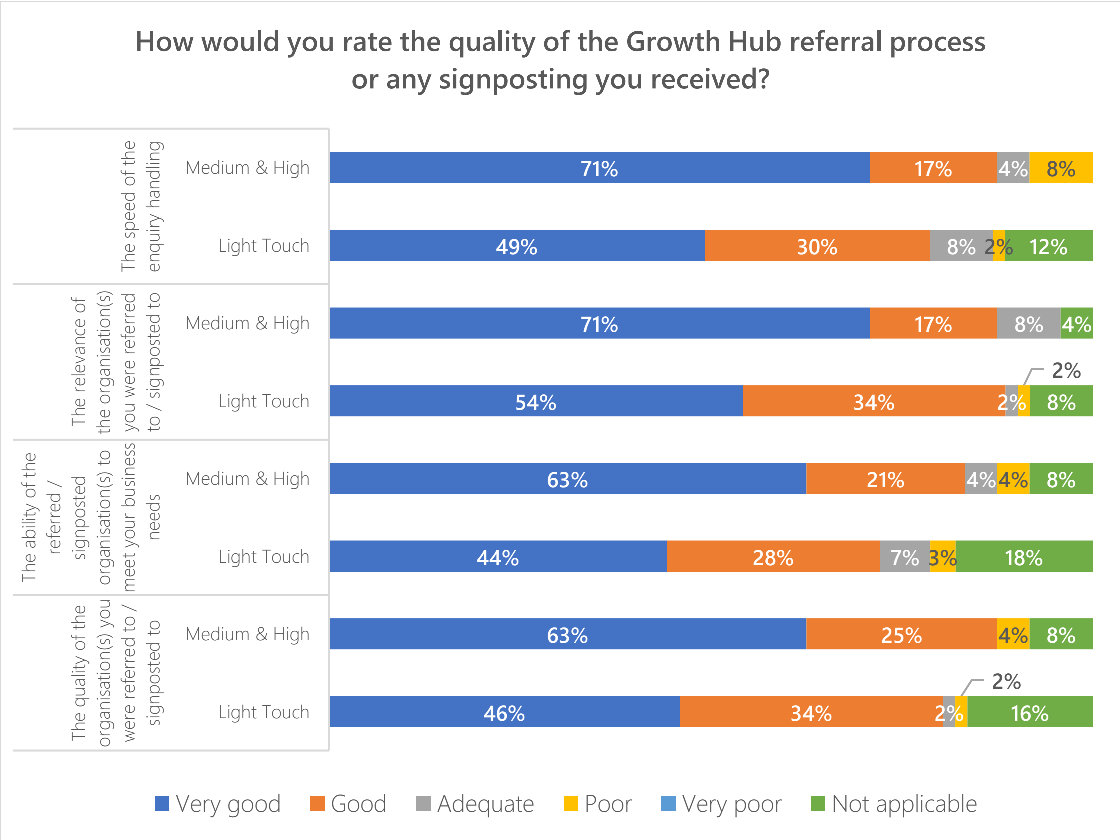
The hub support appears to have provided medium and high intensity businesses with more confidence to achieve their growth aspirations (85%).



Source: KADA Business Survey 2019 (Medium & High Intensity n=59)

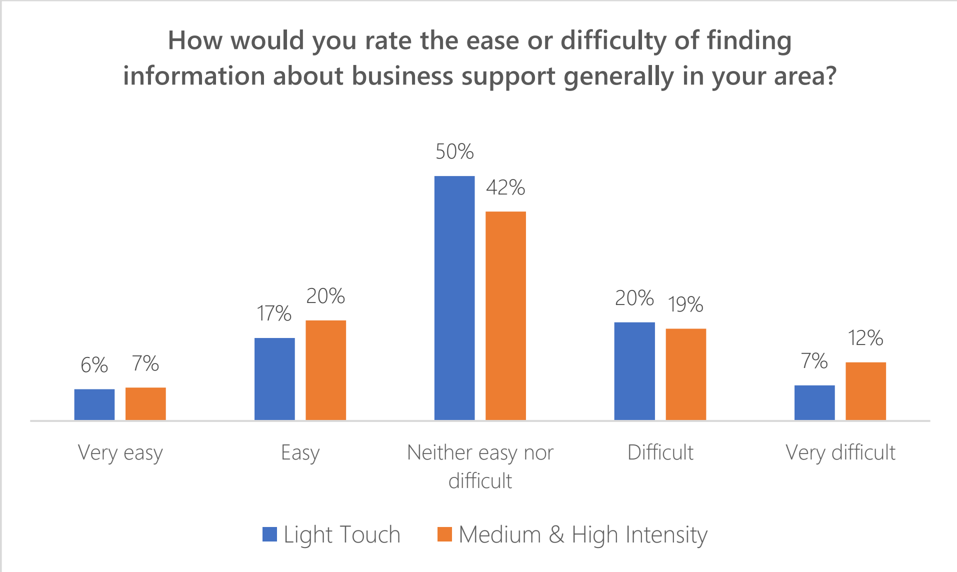
PROGRAMME MANAGEMENT

The referral process scored highly for all four categories of speed, relevance, ability and quality for both the referral and the organisation the business was referred to. Rating of 'very good' or 'good' were all above 72% by both light touch and medium/high intensity.



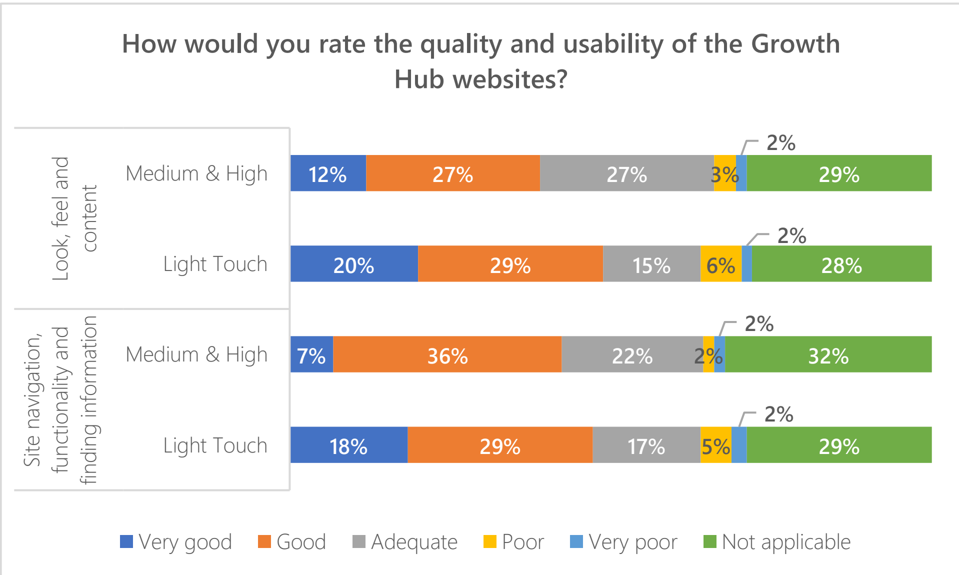
Source: KADA Business Survey 2019 (Light Touch n=61, Medium & High Intensity n=24)

When asked about the ease or difficulty of finding information about business support, the majority of respondents from both light touch and medium and high intensity had similar responses with the majority finding information about business support neither easy nor difficult to find.



Source: KADA Business Survey 2019 (Light Touch n=125, Medium & High Intensity n=59)

Scores for website quality and usability were slightly lower for the medium and high intensity respondents with scores of 39% 'Good' or 'Very good' for 'Look, feel and content' and 43% 'Good' or 'Very good' for 'Site navigation, functionality and finding information'. Whereas light touch scored 49% and 47% respectively.



Source: KADA Business Survey 2019 (Light Touch n=125, Medium & High Intensity n=59)

EFFECT OF PROGRAMME ON BUSINESSES

The online light touch survey asked beneficiary companies to provide a one sentence comment on the effect the programme had on their business. Of the 145 sample of beneficiaries, 108 completed this question. The analysis divided the responses into positive (73, 68%), negative (18, 17%) and either 'mixed' or 'neither' (17, 16%) where there was no clear statement.

Positive Comments: With more than two-thirds of the comments being positive (68%), the majority of these were either linked to the impact on the improved confidence of the beneficiary; the improvement in the organisation/management of the business; and the result of tangible outputs.

The **confidence** gained by the individual for themselves and in their business from the engagement with the project was mentioned 13 times as a positive benefit.

"The support received has been invaluable in boosting my confidence and putting me on the right path. It saved me time and allowed much more progress towards starting my businesses than I would have made on my own within the same time-frame."

"The tailored one-to-one support has made a huge difference to my business, giving me valuable advice, and skills I didn't know I needed; and the confidence and ability to implement changes that I had been putting off for years."

"It gave me the confidence to build a sound foundation for the vision I had and how to market and sell it to others effectively."

The improvement in **management and organisational skills** that were directly linked to the advice received mentioned that the support has helped businesses to:

- have a better understanding of finance and taxes;
- think more clearly;
- not be afraid of making decisions;
- plan and prioritise the most important steps;
- improve marketing skills;
- network better;
- increase their supply chains; and
- speed up their development.

"I have become more efficient in organising my finances at the touch of a button. Also, the advice and support I received has helped our business become ready for 'Making Tax Digital' - something that before we were struggling to do by ourselves."

"The support I received has really helped me think much more in business terms and find much more compelling ways to sell my proposition to potential clients."

"My business is all about social media. The training boosted my knowledge to get better results and reach or target my audience more effectively."

"It has gone from a concept to a planned business that I am in the process of starting, rather than thinking about."

"It has helped us focus on the 'business' of our business; has given us the time and space to articulate our plan; and in very practical terms has helped us create detailed profit and loss breakdowns which have informed several decisions from route to market, to supply source. We've had advice on how best to free up working capital; on how to measure speculative opportunities - all very valuable."

Although the light touch support has been up to 3 hours there have been clear cut outputs and outcomes that have emerged from involvement with the hubs.

Reported outputs and outcomes that have been achieved include:

- creating a new business;
- creating jobs;
- increasing turnover;
- creating business plans;
- more clients;
- more contacts;
- secured funding for the business;
- new spending on equipment and property;
- increasing markets and exports;
- advancing projects on the backburner; and
- overall growing in the business.

"It has helped to get my business from a start up with only a small amount of trading to increase my turnover and taking on another person."

"It's helped me to build my network and make some contacts to offer my services in web-based content writing and digital marketing."

"It has enabled me to successfully apply for the SEBB grant and gave me a steer in the right direction so that I am not wasting my time in applying where the funding wasn't right for me."

"The support has helped me to fine tune my business plan, understand how to find and win business, as well as signposting me to useful training and development opportunities."

"Without the assistance we would not have been able to move forward. We now have focus, and more importantly, we have already gained new business."

"The growth hub service has been professional throughout. It has allowed me to grow my company and I have now opened the new part of the business to the public. So hopefully it will be well received and allow the business to grow further. I have recommended the hub to several other businesses recently."

Mixed Comments: The mixed comments were generally positive about the advisors, but businesses had either not met the criteria or had not yet made time to pursue the options presented to them.

"No progression yet as the finance I was seeking did not fit into any of the categories for which grants are given, but I have to add that the chat I had with your business advisor was very useful in many other respects."

"I have not used any services as such because I have been too preoccupied with company business. I know that the help is already there, and I shall be coming to the agency again very soon."

Negative Comments: All the negative comments were connected to the services provided by individual advisors, or where the programme was not relevant to the company or was too restrictive. There were also comments stating that the funding had been cut and companies were not permitted to complete the process they had begun.

"In general it was a very poor experience with the advisor not understanding the rules of the loans."

"I was unable to use the grants due to the level of fund matching required from me."

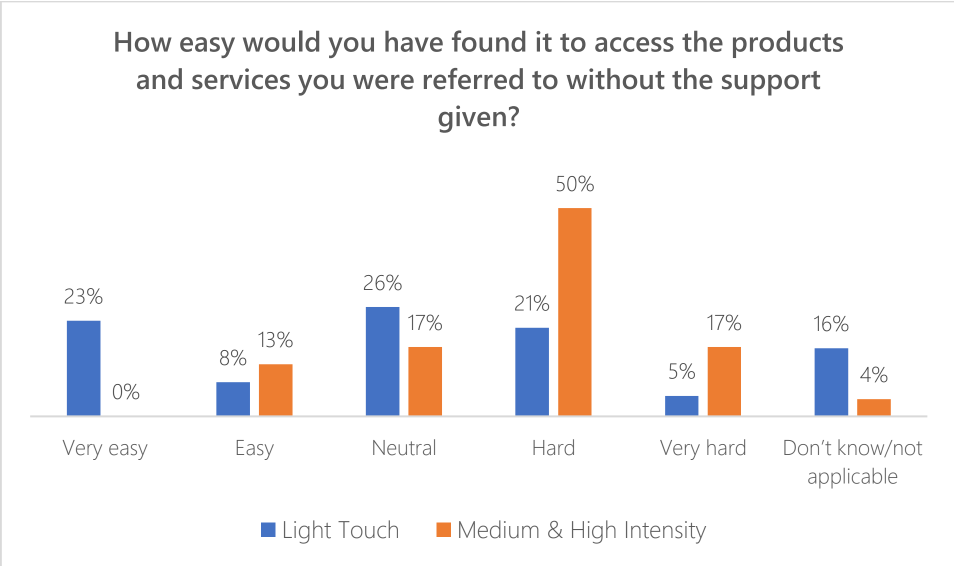
"We were really enthused and felt we were going somewhere. But at the crucial stage of starting it was frustrating as the support was suddenly withdrawn because of funding."

The next Chapter highlights business impacts and future priorities.

4. BUSINESS PERSPECTIVES: IMPACTS AND FUTURE PRIORITIES

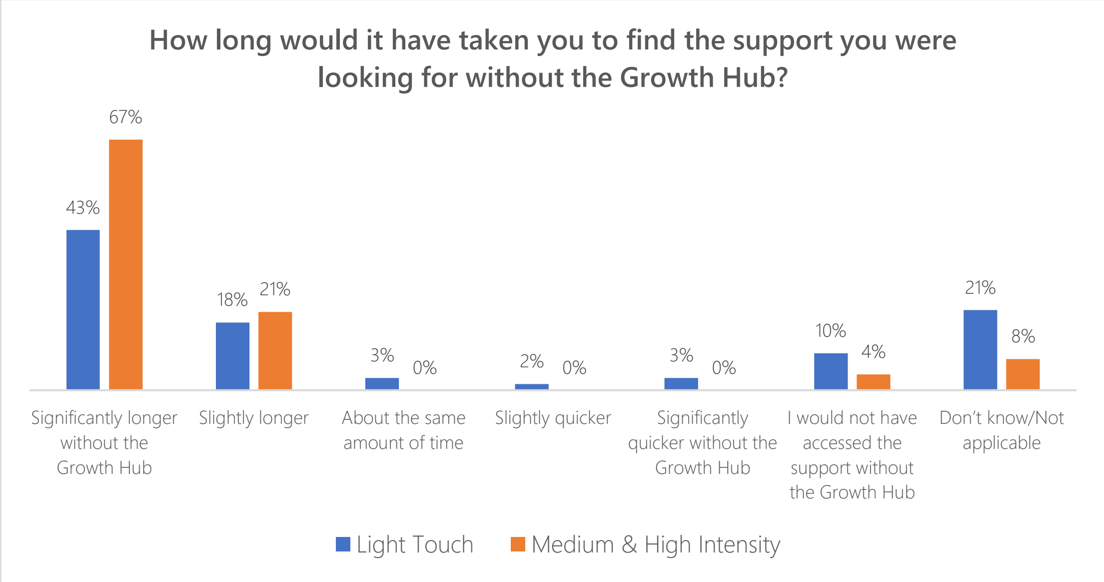
The survey and follow-on interviews sought to understand impacts and future priorities.

IMPACTS AND ADDITIONALITY



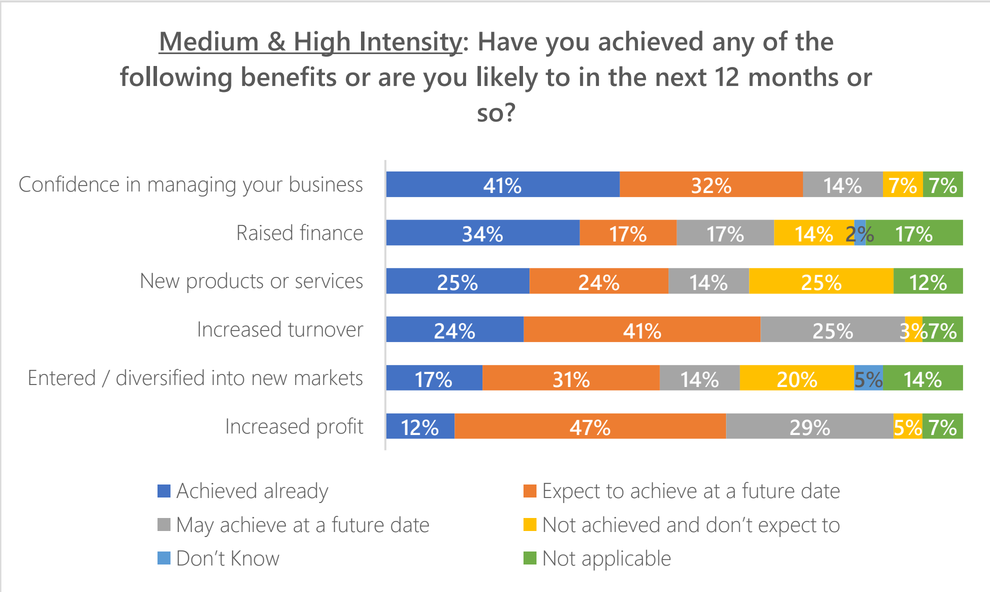
Source: KADA Business Survey 2019 (Light Touch n=61, Medium & High Intensity n=24)

The chart above shows that 31% of light touch respondents and 13% of medium and high intensity respondents would have found it easy or very easy to access the products and services they were referred to in the absence of the support. The next chart shows that 61% of light touch respondents think it would have taken them longer to find support without the hub and 10% of light touch clients would not have accessed support at all without the hub. For the medium and high intensity assisted businesses, 88% of respondents think it would have taken them longer to find support without the hub and 4% of medium and high intensity clients would not have accessed the products and services at all without hub support.



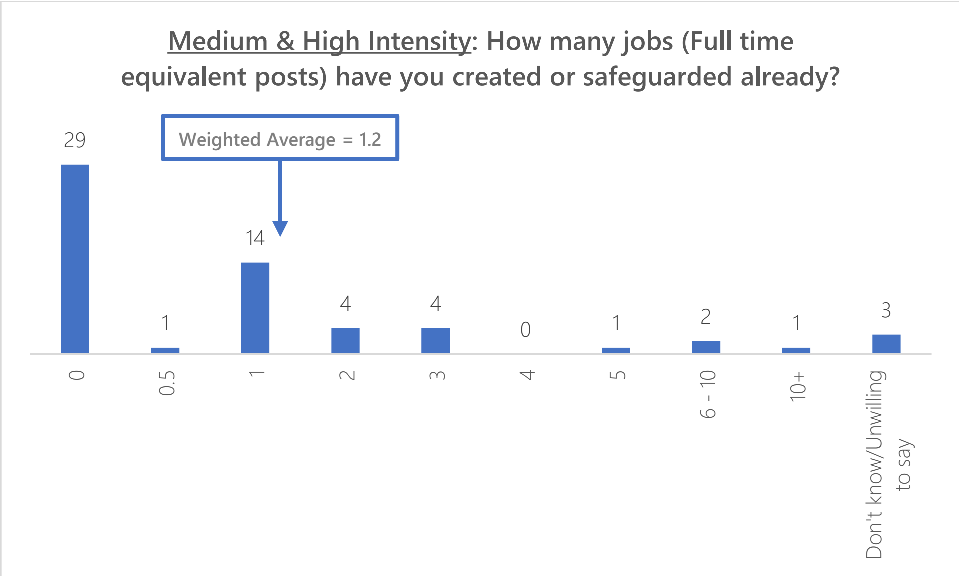
Source: KADA Business Survey 2019 (Light Touch n=61, Medium & High Intensity n=24)

The following question looks at commercial benefits for medium and high intensity firms. 41% of these reported improved business confidence already. 59% have or will increase profit as a result and 65% will increase turnover.

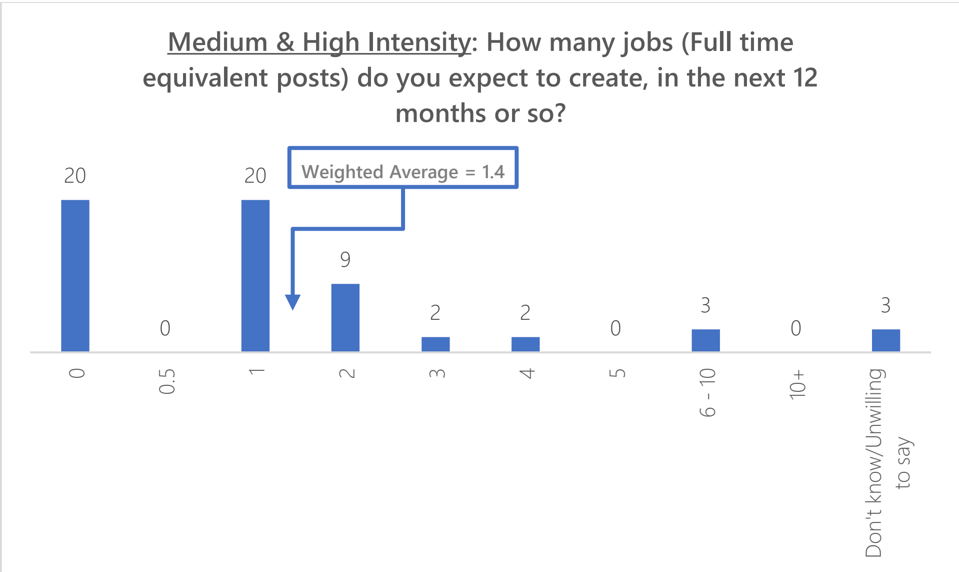


Source: KADA Business Survey 2019 (Medium & High Intensity n=59)

46% of medium and high intensity firms have created 0.5 FTE posts or more as result of the support. The average number of jobs created to date 1.2 FTE. 61% of medium and high intensity firms intend to create a job or part thereof in the next 12 months. The average number of additional jobs anticipated is 1.4 FTEs.

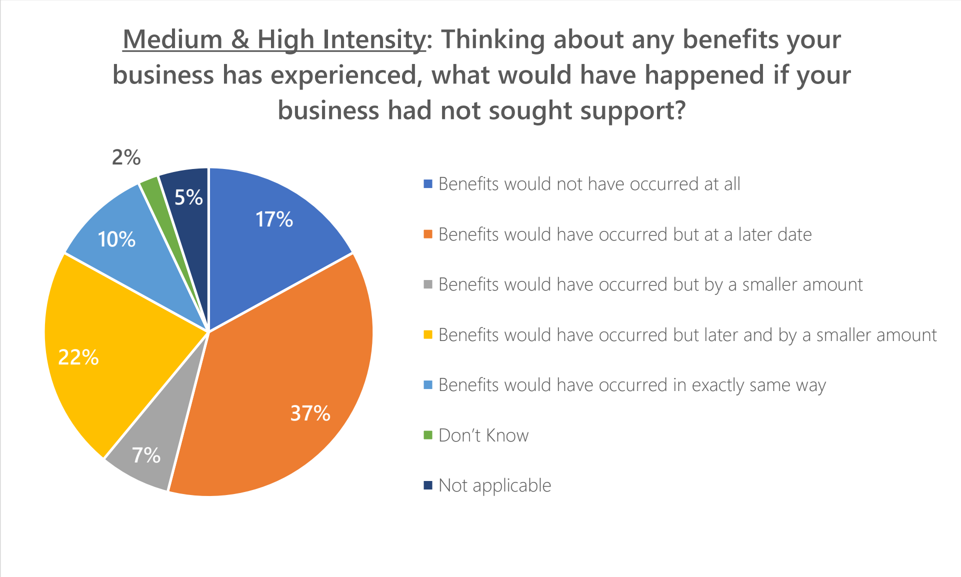


Source: KADA Business Survey 2019 (Medium & High Intensity n=59)



Source: KADA Business Survey 2019 (Medium & High Intensity n=59)

Impact additionality refers to the extent to which businesses would have achieved the same benefits in the absence of the support. Only medium and high intensity businesses were asked this question. Nearly a fifth (17%) of all respondents think that benefits would not have occurred at all without the support, while a further 37% think that benefits would have occurred at a later date and a further 7% think that benefits would have been smaller. 22% of all respondents think that benefits would have occurred but later and by a smaller amount. One-tenth (10%) of all respondents think that benefits would have occurred in exactly the same way even without the hub support. In other words, there is a low level of reported deadweight which is encouraging.



Source: KADA Business Survey 2019 (Medium & High Intensity n=59)

FUTURE PRIORITIES

Are there any of the following areas that you might welcome future support to help grow your business?	Light Touch	
	n	%
Funding and Finance	54	46.2%
Social media, on-line marketing &/or on-line presence	54	46.2%
General business growth assistance or advice	52	44.4%
Networking, collaborations or space to meet	44	37.6%
Strategic business advice, mentoring, management or leadership training	41	35.0%
Skills and training	40	34.2%
New ideas, R&D or protecting your work	24	20.5%
Specific advice for my sector	24	20.5%
Digital technologies or new technologies more generally	19	16.2%
Capital, sites and premises	17	14.5%
New markets including international trade	16	13.7%
Preparations for Brexit	10	8.5%
Investment readiness	9	7.7%
Other (please specify)	9	7.7%
Don't know or not applicable	8	6.8%

Source: KADA Business Survey 2019 (Light Touch n=117)

Light touch firms were also asked where they would welcome future support. The results appear in the table above. The top responses mirror the initial enquiries identified earlier in terms of funding and business growth. Social media and networking score highly.

ECONOMIC IMPACT ASSESSMENT IMPACTS AND VALUE FOR MONEY - APPROACH

This section of this Chapter looks at the economic impacts of the investment in the SEBH as well as value for money.

It assesses the gross value added (GVA) of the SEBH and the extent to which it is making a difference (compared to if the improvements had not been implemented). The analysis is based on reported outputs to date and responses to the business survey. A comprehensive assessment of economic impact was undertaken comprising:

- Net Employment and GVA NPV impacts to date (taking into account 1.5 years of persistence).
- Total public cost impacts and value for money.

Two tiers of effects were considered:

- Direct Employment: Employment impacts and resultant GVA from jobs created. These were based on survey findings from the firms collated by the research team from high and medium intensity (no impact has been counted from light touch firms).
- Indirect Employment Effect: The effect on suppliers and resultant productivity / GVA. These were calculated using a benchmark (see below).

Employment effects are considered both before (gross) and after (net) following adjustments for additionality, displacement, leakage and indirect effects (multipliers and supplier effects). The Treasury's Green Book offers some suggested guidelines in assessing the true impact of investments to adjust the effects from gross to net. In line with these several steps have been taken to assess gross and net GVA and employment impacts and net present value. A very conservative and cautious approach was taken.

- Deadweight was assumed at 47% based on survey findings.
- Displacement and leakage were both assumed moderate at 29.3% and 25% respectively (HCA Additionality Guide Fourth Edition).
- A low composite multiplier was used to calculate the indirect employment effects (from the HCA Additionality Guide Fourth Edition) using the sub-regional mean for business development and competitiveness (1.25).
- The persistence of the benefits i.e. how many years the benefits are expected to persist and the period over which benefits will accrue until they reach their full potential. In this instance, a very conservative 1.5 year time frame was chosen based on experience elsewhere.
- A decay of 10% per annum has been used i.e. the proportion of annual benefits expected to be lost from one year to the next due to economic changes, other investment decisions etc.
- Calculation of the Net Present Value (NPV)[3] of the GVA benefit stream over the appropriate persistence time period by discounting back utilising an appropriate rate. HM Treasury Green Book guidance has been followed which recommends discounting by 3.5% in order to determine NPV.
- A cost benefit ratio calculated by Net Present Cost (NPC) against NPV i.e. the amount each £1 of investment generates.

[3] Net present value is a calculation that compares the amount invested today to the present value of the future cash receipts from the investment. In other words, the amount invested is compared to the future cash amounts after they are discounted by a specified rate of return.

- GVA per head used a conservative population per head-based figure from the House of Commons Library Briefing Paper.
- The employment figures provided by firms were moderated to account for optimum bias and a counterfactual perspective by 50%.

HEADLINE ECONOMIC IMPACTS AND VALUE FOR MONEY

The following tables show that the SEBH programme has:

- Already created 994 direct gross FTE jobs (795 direct and 199 indirect) and a total NPV GVA of £11.5 million.
- The potential to generate a further 1,153 direct gross FTE jobs (922 direct and 231 indirect) and a total NPV GVA of £13.3 million.

As mentioned, the direct jobs are based on an analysis and extrapolation of survey data for medium and high intensity firms and the indirect jobs have been generated using a recognised multiplier (see previous section).[4]

Economic Impacts to Date

	Gross Jobs	Net Jobs	NPV over 1.5 years
Total (FTE)	994	279	£11,491,575
Direct Jobs	795	223	£9,193,260
Indirect	199	56	£2,298,315

Source: Kada Research

Potential Future Economic Impacts

	Gross Jobs	Net Jobs	NPV over 1.5 years
Total (FTE)	1,153	324	£13,333,736
Direct Jobs	922	259	£10,666,988
Indirect	231	65	£2,666,747

Source: Kada Research

Part of the evaluation brief was to explore the impact of scaleup support. Only 5 responses of the 59 received from medium and high intensively support businesses were tracked as scaleups. This was deemed too low to offer any meaningful insights.

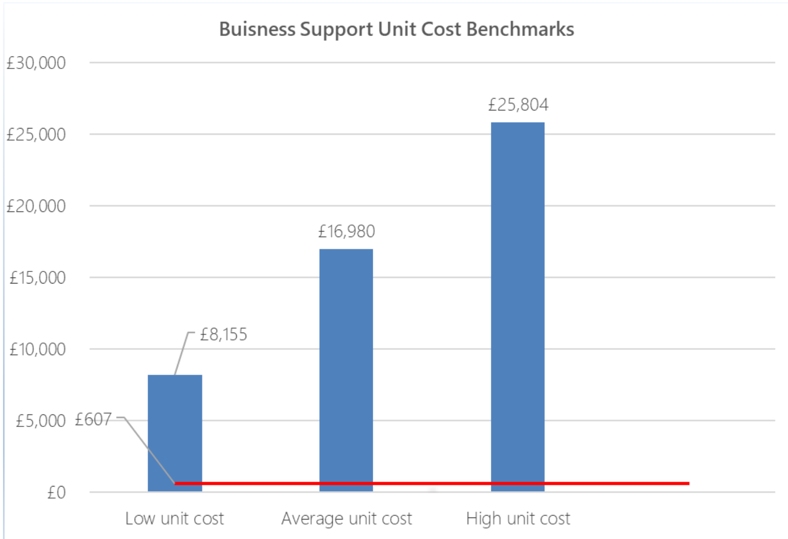
VALUE FOR MONEY ASSESSMENT

The estimated GVA NPV to date of £11.5m would result in a cost benefit ratio (CBR) of 1:13.2 i.e. each £1.00 of public investment will generate £13.20. This is much higher than what is typically expected for this kind of initiative (even with the conservative approach taken). For instance, a review by CRESR of evidence for general business support activity cites a CBR of 1:6.0 to 1:8.7[5]. The reasons for this high return on investment are a

[5] Valuing the Benefits of Regeneration, 2011, Figure 4.8

consequence of the fact that so little funding is provided to run the service (less than £1m) which means generating an immediate return is relatively straightforward when there are so many beneficiaries (1432).

The total project cost per business assisted is £607 and the cost per gross direct job generated to date is £1,094. The cost per business assisted is much lower than what is expected for this kind of activity which ranges from £4,700 lower quartile to £10,000 (median) and £34,000 (mean)[6]. Again, the cost per gross job generated is much lower than might be expected for this kind of activity which varies from £12,000 (lower quartile) to £26,000 (median) and £71,000 (mean)[7]. The very cost-effective nature of the project reflects the fact it was relatively inexpensive to deliver yet managed to generate a considerable number of jobs and resultant GVA impacts.



Source: Regeneris Consulting: ERDF Programme 2014-20

The programme has therefore been a clear success in terms of value for money. Its cost benefit ratio; cost per business assisted; and cost per job are all much better than other similar programmes.

The following Chapter looks in more detail at programme delivery from the stakeholder perspective.

[6] England ERDF Programme 2014-20: Output Unit Costs & Definitions, A Final Report by Regeneris Consulting, 2013, 96
[7] Op. Cit.p10.

5. DELIVERY – STAKEHOLDER OBSERVATIONS

This Chapter presents the views of stakeholders on the delivery and strategic direction of the service. It examines service integration, one of the key BEIS Growth Hub principles. It concludes with an assessment of delivery and added value.

STRATEGY AND CONTEXT

"There is a significant risk that the level of resources for each Growth Hub is insufficient to deliver an effective scaleup support programme".

The original context for the SEBH, in terms of providing a gateway to information and advice for businesses, particularly start-up businesses, was well understood by the stakeholders consulted in each Federated area. There was also wide understanding of the more recent policy shift toward scaleups and the parallel development and national information resources for start-ups and general business information. This policy shift was met with mixed opinions. It makes sense with limited resources but also could cost more per business to deliver. More remote districts are concerned that they simply don't have a sufficient number of businesses to meet the scaleup criteria so were testing the concept locally through pilots.

For those areas with significant scaleup potential, the policy direction provides an opportunity for much closer account management and the chance to work with companies over a longer timescale to achieve more impactful growth results and what one stakeholder referred to as a 'reputational dividend'. BEST believe the scaleup programme has been transformational for some of their businesses and have case studies to back this up. K&M and BES have scaleup programme and pilots. There are recommendations to advance this work.

Brexit was regarded as a very significant issue regarding the context of business support and challenging to help businesses with. The Chambers of Commerce guidance and Government information was well publicised. There is perhaps scope for more direct support and training for advisors (see recommendations).

The Local Industrial Strategy was discussed with stakeholders, but as there has been very little activity to date to develop an approach in the SELEP area with the three Federated areas, there was little comment or insight. There is an opportunity to engage partners more proactively here.

LOCAL AND NATIONAL INTEGRATION

At the national level there has been some involvement of SELEP in Sector Deals. The Government awarded £4.3m to develop the Thames Estuary Production Corridor, a collaborative project aiming to put the South East's creative industries at the heart of the national industrial strategy. Essex and the University of Kent are working together as part of the ambitious collaboration which also brings together local authorities and SELEP. The fund is part of the Government and industry's Creative Industries Sector Deal, to help the country's world-leading cultural and creative businesses thrive.

As part of the second Life Sciences Sector Deal GW Pharmaceuticals, a pioneering UK-based biopharmaceutical company developing and delivering rigorously tested and regulatory-approved cannabis-derived medicines for seriously ill patients, has spent over £20 million expanding its manufacturing facilities in Kent in 2018 and more than £100 million in R&D, creating 111 highly-skilled roles, with an additional 98 planned.

Innovate UK (IUK) have had conversations with each hub directly and the SEBH attend local Innovate UK events. The SELEP team has also been building a joint approach with IUK. An event to raise awareness is being organised in conjunction with IUK, the Knowledge Transfer Network and Enterprise Europe Network. IUK are also invited to attend and contribute to local providers' meetings.

The recent Science and Innovation Audits for the South and East of England set out some of the Universities' key capabilities, highlighting ICT and data analytics at the University of Essex; bioscience at the University of Kent; engineering at Greenwich and Sussex; and environmental sciences at Anglia Ruskin. The hubs have developed strong relationships with these partners and refer business to expertise where appropriate.

The SEBH is engaged closely with the KEEP+ regional team and the K&M hub is in the top five referrers to the programme. There are regular meetings between both DIT and EEN and representatives of the SEBH, including referral network groups, provider networks and direct briefings. There is direct brokering to local International Trade Advisors and there is collaboration on events and activities though it is unclear how much these events are cross referred across the Federated areas. East Sussex County Council recently sponsored a series of 'get exporting' events co-run by DIT.

The BES hub is able to facilitate customer access to, where appropriate, business funding supported by British Business Bank (BBB) Enterprise Finance Guarantee through the Let's Do Business Group, subsidiary of Let's Do Business Finance. The BEST hub is part of the pilot project between the BBB and ICAEW. K&M is a referral partner for the Start Up Loan company and the BBB sits on the K&M Steering Group. ICAEW are also on the K&M Steering Group.

There is quarterly contact with the IPO to exchange information and feedback. The IPO have previously provided training sessions for the hubs and this knowledge is still used. They form part of the wider referral network group and attend the BEST Essex Business Show. The nearest IPO locations are London, Norwich, and Cambridge. Hubs signpost to relevant IPO events.

Be the Business team have presented at the Kent business forum and the University of Kent in the past. There is scope for further involvement in the other two hubs.

In parts of the geography there are really strong relationships with local banks (for instance through pop up cafés) and they are a solid source of referrals. The SEBB programme provides access to a full time 'Access to Finance' co-ordinator with extensive experience of supporting SMEs to gain funding. Two hubs have an on-line business finance finder tool and there is signposting to London networks. Hubs have close links with a variety of traditional and non-traditional finance providers offering loans, grants and equity finance.

K&M hub works with the Kent Investors Network (KIN) who offer equity investment and mentoring. Typical investments range from £50k to £1m. Whilst the majority of investments are Kent based, companies across SELEP have also received funding. Members provide the business funding sought by companies bringing considerable business experience. KIN meets every two months, at various Kent locations, where around a handful of investment-seeking companies present their business plan and showcase their opportunity.

"I am very impressed by the professionalism of the Growth Hub. Their commitment is outstanding and understanding of the market and what business want is very good." (University Partner)

The nine Universities are a core asset and the hubs are helping to support the process of knowledge transfer between the Universities and the business base. Universities sit on local hub Steering Groups and have clear engagement. The University of Kent has a hub for Innovation and Enterprise which make referrals to the hub website if they cannot meet a business requirement. One University partner in Essex claimed they got referrals from their local hub. *"We have enjoyed working with the Growth Hub. It's been a good experience and they are committed and believe in trying to help businesses to improve the economy of Essex"*. There is also engagement through the KEEP+ programme (though the current funding round is almost fully allocated).

It was still claimed more could be done to exploit operational links with Universities as a means of providing business support. While there are some good examples of specific projects happening on the ground, a more strategic approach to deepening business/University links to create business support opportunities could be considered (see recommendations).

The co-located Locate East Sussex inward investment service, means that the BES hub has access to a full time Innovation and Partnerships Manager, who works directly with the Universities to encourage and foster innovation, enabling SMEs to access HE resources. There are also links with FE colleges across the SELEP area and FE colleges are represented on steering groups and skills provider groups.

The four SELEP Enterprise zones are designed to promote large-scale areas of industrial specialisation:

- Newhaven Enterprise Zone: covering advanced engineering, marine and environmental technologies linked to recent major developments.
- North Kent: Centres of excellence for medical and life sciences, engineering and digital technologies.
- Discovery Park: Occupying the former Pfizer site, with five decades of ground-breaking pharmaceutical research and development.
- Harlow: Harlow Enterprise Zone is capitalising upon two of the town's existing strengths – Advanced Manufacturing and Life Sciences.

Wrap around support is offered to prospective businesses moving into some of the Enterprise Zones in the SELEP area. Co-location of hubs and inward investment organisations means there is a great deal of informal knowledge exchange. The first Case Study in Annex Two looks at a print and design company in Essex who, following referrals from the Invest Essex and South East Business Hub via BEST, was able to accelerate ambitious scaleup plans. It demonstrates how well the Business Navigator has worked closely with partners to deliver a comprehensive and impactful portfolio of support to thoroughly modernise the business. The benefits cited are wide ranging and include low carbon technologies, new machinery and refurbished premises, new jobs and a substantial R&D tax rebate.

Currently the hubs have limited engagement with the Catapult network. This is a missed opportunity and it would be worth exploring cross boarder links with relevant catapults at the SEBH steering group with one partner reporting back on the group's behalf. Target catapults are aligned with the Enterprise Zones' industrial specialisms and include Off-Shore Renewable Energy, Medicine Discovery and High Value Manufacturing.

The hubs provide links to local incubators and accelerators. For instance, BEST lists well located and affordable enterprise centres and incubation spaces.

Partners recognise that providing informal advice to a business at an early stage will help achieve compliance, rather than deal with a poor outcome through regulation. This makes good economic sense and businesses are encouraged through the SEBH to seek advice from regulators on legal compliance. BEST has links to relevant support locally and was awarded LGA funding to make a short animation for Essex businesses on regulatory services. Perhaps links with Better Business for All (regulatory advice service) could be strengthened.

Library services and facilities are sign-posted. BEST hub has held many pop-up cafes in Epping, Maldon, Hadleigh, Chelmsford, Harlow, Rochford, Tendring, Basildon, Thurrock, Brentwood and Braintree. Here local, qualified professionals including experts from banking, marketing, accounting and law are on hand to give free advice to businesses at one-to-one sessions.

The SEBH has an outstanding track record of partnership working, with steering groups at a local and pan LEP level. Local steering groups are made up of a wide range of support providers, particularly those interacting directly with businesses, from public and private sectors as well as representational bodies including Chambers of Commerce and the Federation of Small Businesses (FSB). The SEBH links with large numbers of third-party suppliers, having built links over the last three years. This includes specialists in HR, taxation, marketing and third sector. The team has built links with the School for Social Enterprise.

In terms of partnership working with the private sector, SELEP is a key partner in the annual Business Vision Live event - the South East's premier business showcase. The event brings together over 3,000 visitors and 200 exhibitors every year, with the aim of creating new customer, supplier and partner relationships to promote business growth. BEST has an annual showcase of business support providers. They offer workshops and support providers who exhibited on the day. This year's included workshops on Apprenticeships, digital tax, SEO marketing and social enterprise. BES were present at Best4Biz annual conference (Best4Biz is a business conference in East Sussex with over 250 business guests and speakers from around the UK supported by East Sussex County Council).

IoD and FSB also sit on local hub Steering Groups as well as Chambers, and there are very strong links with Chambers of Commerce which are currently providing part of the SEBH service in the South East. There is scope for further practical links between these partners on-line and to their respective events (see recommendations).

"The hub has good engagement with local authorities. This has allowed us to build up a good relationship with our key contact there and share information."

Local Authorities are also on local hub Steering Groups and represented at the SELEP SEBH steering group. The hubs have key links to the Economic Development Officers of local authorities and there are many meetings and, in some cases, joint visits to businesses etc. One local authority noted they had links on their website to their local hub and claimed they [the hub] were *"really good at flagging things to us, coming to any event we do and telling people about funding"*. They added that from a district perspective *"it comes down to Navigators and how visible they are and their contacts"*.

BEST has a new Partnership Coordinator to build on these and similar relationships.

DELIVERY

THE DELIVERY MODEL

"A key strength of the SELEP approach and its success to date is due to delivery being rooted in the local economic landscape, using the knowledge of local business communities and industries. Central Government resources wouldn't provide that."

"Having the LEP as overarching organisation there's a stronger case and identity".

The Federated Model made sense to a wide range of stakeholders across all three Federated areas as an effective way to deliver business support and information in the SELEP area. The model is considered essential as a means of ensuring consistent provision across a very large geographical area and that can cope with the nuances of local need and delivery.

Although the approach makes sense, some stakeholders still note disparities in provision. Even where there is substantial provision available, the hubs are still only reaching a small fraction of businesses overall.

As noted in the previous section, the relationship between hubs and local authorities is working well and it has improved. Significant effort was needed in the early days to ensure communications worked smoothly and that referrals were going from the local authorities to the hubs. Some local authorities still handle some business support activity 'in house' and do not routinely make as many referrals to the hubs as others. Overall local engagement is strong.

Integration between the hubs and the South East Business Boost (SEBB) programme was noted as a key strength in delivery. Co-location is one contributing factor, but advisers also reported instances of joint company visits with other partners such as Universities or local authorities. The East Sussex SEBB team feel the addition of SEBB has helped to improve the skill sets of the whole hub team by having specialists in finance, marketing, entrepreneurship and also sector specialisms.

"ERDF meetings offer an opportunity to share learning and outputs, facilitating communication and collaboration.".

K&M use one template for business support programmes to avoid duplication for businesses. All areas have been very proactive in co-ordinating local activity and created steering groups to share information. Joint ERDF project meetings are also held to reduce duplication and improve understanding and referral. There was scope for better links with some larger national providers (see previous section) and between local areas who do not seem to be making the most of each other's offers.

"Live Chat also a good method to control the triaging of enquiries."

Live Chat is a quick and easy entry point into hub services and means of establishing trust for more in-depth help when ready.

"What could we have expected from Growth Hubs from the SELEP level of

Whilst the Federated Model was regarded by one stakeholder as being useful so far, they also perceived that the continued lack of resources, or further reductions in resources would push each Federated area to consider the economies of scale that they may be able to realise through joint working. Perhaps there was scope to keep the local face to face and networking *administration or leadership? There has been no discussion about shared expertise or economies of scale."*

elements of the Federated Model but achieve some back-office efficiencies in the SELEP area. For some stakeholders, whilst there was some gratitude that SELEP had facilitated the Federated Model, there was a sense more value added could be realised through joint working.

There was also minor criticism of the SEBH, and Federated approach taken by SELEP as not capturing some of the potential benefits of better collaboration with the private sector, as has been achieved in other LEP areas.

There was some concern in East Sussex about the performance of its hub in terms of the number of referrals being made, compared to delivery in the other two SELEP areas. The reasons behind the low incidence of referrals was being investigated by East Sussex County Council and the contract manager. This study has found differences in the way business support data is captured which may explain part of this (see recommendations).

PRODUCTS AND SERVICES

"There has been a step change in the service offer".

"The BEST team understand the differences between various grant schemes – they are knowledgeable to work out what's best for the SME and referral procedures are effective."

There is comprehensive knowledge of local business support offers. K&M have mapped local products and services and conduct their own research on what is available. The SEBH partners have developed good links with local and national providers (see previous section). "*They do look at the whole picture and have no allegiances so are doing the best for the business*" (External Stakeholder).

In terms of gaps there was scope for more investment readiness support as many small or new businesses were not sufficiently prepared to absorb various forms of support resulting in low conversion rates and delays as firms took additional measures to prepare themselves for finance. A lack of financial skills and literacy in many small businesses was noted as well as a lack of basic business competencies.

The SEBH partners have had to cope with disparities in geographic provision and/or need which can make it difficult to signpost. For instance, Dartford was well covered with business support provision and Thanet has more gaps and a higher proportion of hard to reach businesses where 121 advice was highly regarded yet sometimes hard to demonstrate adequate economic potential.

The hubs would welcome more feedback from providers that been referred to so ("some are better than others at providing feedback").

K&M undertook a trial for the Adviser Finder service, a database of private providers of business support. Take up was very low and with businesses tending to prefer using their own personal contacts the idea was scrapped. One stakeholder voiced disappointment about this as they believe this offered a useful, practical service to those businesses who don't have ready access to a wide network of contacts.

In East Sussex, it was recognised that a variety of ERDF-funded business support projects and grants had helped to provide further support for hub advisors to broker to, and that the relationship between BES and the ERDF grant/project coordinators worked well in terms of knowledge and referrals. For example, BES had brokered to a number of successful energy efficiency savings projects facilitated by ERDF funding. It was now felt that both the SEBH and ERDF funded support could try to develop a shared diagnostic system or approach and share data to ease the burden on SMEs, who were asked to repeat themselves a lot in terms of information on the company and its support needs.

Overall, stakeholders in East Sussex perceived referral procedures and agreements to be working very well. This has worked especially well with regard to other ERDF-funded business support initiatives and joint working with FE colleges. There is perhaps scope for more SELEP wide products. SEBB has shown that such collaborations can succeed. In addition to SEBB 2 partners should lobby for a LEP wide investment readiness product.

IDENTITY AND ENGAGEMENT

"Ask Phil is a great bridge building tool for partnership working and also soaks up a lot of the light touch enquiries."

The SEBH has continued to develop its access channels and the successful Ask Phil webchat service offers free advice, information and guidance to help start, grow or improve businesses. It was started in K&M to ensure remote areas could get access to hub services. It will now be rolled out across three hubs. Live Chat is staffed 9.00am to 5.30pm and has be a good tool for partnership working and absorbing many light touch enquiries. Partners such as the FSB would be happy to promote the link to their members.

Although generally well received, some felt there is scope to consider how this very fast-moving technology can be used in future to deliver a more sophisticated service utilising the latest AI technologies, for example and offer better follow up. BES use an #AskFred twitter hashtag to engage local businesses and start conversations through videos etc across the business community.

In East Sussex there was some concern that the brand association with the previous first round of hub funding, for start-up support and general business advice – would now be confused with the focus on scaleups.

Stakeholders in East Sussex noted that the levels of engagement of the hub with local business events and networks had tailed off over the past year, and that opportunities had been missed for promoting the brand and service, and for engaging with the business community.

The overall awareness of the SEBH is low amongst the business community. This is partly down to the success of the SEBH in 'hiding the wiring' to make the process of accessing support as seamless as possible for businesses. That said, there have been notable improvements through initiatives such as radio and bus advertising. This was described as a costly exercise but effective as enquiry numbers surged as a result. However, it is important that this is done regularly rather than in short, occasional bursts. A consistent 'drip feeding' of key marketing messages is required to help boost awareness levels. It is not known if there has been any analysis of return on investment for each marketing element.

There were multiple examples quoted of sharing information and attending networking events. Each hub endeavours to have representatives at major networking events but some respondents believe there is scope to do much more. For example, one external business organisation claimed it would be charged to advertise their events at their local hub website.

The events listings on the hub websites are a valuable asset; however, one respondent remarked that in their area, it was heavily skewed towards hub events and not a comprehensive listing of all that is available. Charged events are excluded which seems short sighted. Events promotion is addressed in the recommendations.

There is considerable support for doing more to share exemplary case studies across SELEP.

"We have met regularly with the Growth Hub to discuss how we can streamline our business networks and contacts, and how we can more effectively cross-refer businesses."

"The aspiration should be for the Growth Hub to be the default, go-to place for a business that wanted to grow. We're not quite there at the moment."

"Business East Sussex has achieved significant reach in terms of the number businesses engaged, and the number of diagnostics and triage sessions. It has unearthed a lot of interesting new relationships."

The current shift to a central website makes sense from a co-ordination perspective. Partners were keen not to lose their local distinctiveness and their capacity to meet and respond to local needs. One area voiced concern that the SEBH should not be used purely to disseminate Government policies on its behalf (e.g. on Brexit) which could dilute the local focus.

There was some perception that hub services and delivery has begun to encroach upon the inward investment and business retention activities that are being delivered within the three Federated Areas within SELEP. There were some views expressed that the bulk of inward investment related activity is focused on retention and repeat investment – and that the nature of the advice and support offered, and some of the beneficiary firms were similar to the aspirations for scaleup support and delivery.

There were consistent views that the hubs didn't use methods that might better engage young people, women and ethnic minorities. These methods could include webinars, YouTube, more user-friendly arrangements for women, and account managers and networking suitable for ethnic minorities. Some believe there is scope to engage on a sector basis with particular potential in the creative and cultural sectors.

More generally, there was considered scope for more face to face methods – including seminars, working groups, networks, and focus groups. One business representative group compared services to another nearby LEP area and by comparison, the SELEP area had fewer dynamic events and business networking meetings.

In summary, the hubs and the SEBH were viewed as having an established a strong and growing brand with good initial engagement. However, it was widely believed that more could be done to promote the SEBH and the hubs branding and engagement, and to engage with more businesses – particularly within more remote rural areas. With the focus changing towards supporting scaleup businesses, this may confuse the brand and also lead to less engagement with local businesses.

MANAGEMENT

"It has been challenging to develop and deliver an effective business support service when central Government keeps changing the

There was general satisfaction that the SEGH services had been procured in an appropriate way, and that steering groups were useful and SELEP was effective and listened to local stakeholders' input.

Stakeholders involved in steering groups and the management of the SEBH recognised the challenges of developing and delivering the service in the face *focus, rules and funding".*

of changes by central Government. There was also an appetite to work more closely together in the coming 12 months.

The hubs hold an Annual Showcase of Business Support Providers which has been well received by local stakeholders and businesses alike. The move towards one event rotated each year would reinforce the SEBH identity and perhaps promote further cross fertilisation.

Members of the BES steering group indicated that they have started to move away from just scrutinising performance data over the past 3-4 months. There has been a push to understand the impact of the SEBH more widely. It has been recognised that the KPIs don't say anything too on impact, and just report outputs. There is an appetite to understand impacts better. *"Current KPIs tell you nothing about impact, they just tell you how many businesses have been contacted."*

6. CONCLUSIONS AND RECOMMENDATIONS

This final Chapter concludes with an assessment of what has worked well, the challenges and future direction of the programme. It reflects progress against the 2018 evaluation recommendations and makes some new recommendations related to strategy, operations and future evaluation.

CHALLENGES

One of the challenges of having a Federated Model is data sharing and CRM systems. The central team have access to two CRM systems but a third is yet to be linked meaning it is a challenge to get live data for the whole area. A solution is currently being explored.

The shifting national Growth Hub priorities towards a scaleups agenda has been a challenge in some geographies including some more remote and rural areas. The SELEP economy has a diverse sectoral mix and several sector strengths that are quite locally concentrated, and the partners would also like to help those firms with ambition to scale. One challenge for SELEP is providing sufficient support to improve productivity within the whole economy whilst recognising that some sectors and scaleups will face specific opportunities and challenges.

Despite successes the profile and awareness of hub services could be further enhanced as the key gateway to business support.

One of the main challenges has been to deepen the collective role and influence of the SEBH. There has been good progress on data sharing, performance monitoring and web alignment (a shared site is due to be launched). There is scope to enhance the consistency of KPIs and these will be discussed and collectively agreed in a working session in coming months (see recommendations). The SEBH Steering Group is in the process of shifting from an information sharing forum to a collaborative working group that shares knowledge and learning, works jointly on shared interests and builds consensus to enhance the development of the Business Hub.

Partners have learned a lot about effective engagement with business and to reach out to remote areas. Live Chat for instance has been a quick and easy entry point into hub services. Many businesses will start here, establish trust and come back for more in-depth help when they are ready. Partners have worked hard to improve the visibility of the SEBH across the geography and helped gain the trust of partners. That said the size of the SELEP area can mean that Business Navigator time is stretched, and they have to prioritise their case load. One partner noted *"the Growth Hub team have not got the capacity to do what they want to do"*.

It was also a concern, that there was insufficient aftercare or follow up with businesses assisted by the hubs. The lack of any systematic follow-up was especially evident when companies were signposted towards a choice of three private providers i.e. if no free support was available. It is possible to flag when follow-up is due via the CRM system, but this is not implemented in any systematic way.

Some ad-hoc follow-up/feedback does occur, but this tends to be the exception rather than the rule and is limited to a few proactive partners. The close hub/SEBB relationship is more conducive to feedback and is not necessarily easy to replicate elsewhere.

There is scope for more investment readiness support as many small or new businesses are not sufficiently investment ready to absorb more intensive support. This is resulting in low conversion rates and delays as firms took additional measures to prepare themselves for finance. A lack of financial skills and literacy in many small businesses was noted as well as lack of basic business competencies.

WHAT HAS WORKED WELL

Key to the success of the SEBH is the effectiveness of the Federated Model. By focusing on shared priorities, the team has an opportunity to add value to, and support, activity at the local level. The Federated Model offers a comprehensive portfolio of impartial tailored support available across the three areas from start-ups to established businesses.

"A key strength of the SELEP approach and its success to date is due to delivery being rooted in the local economic landscape, using the knowledge of local business communities and industries."

The SEBH has considerable geographical reach, strong stakeholder relations and wide publicity of local services. The model offers sufficient flexibility to offer an effective triage and referral service into national, SELEP wide and local support and expertise.

All areas have been very proactive in co-ordinating local activity and created steering groups to share information. Joint ERDF project meetings are also held to reduce duplication and improve understanding and referral. Data sharing agreements are now in place as part of Service Level Agreements and will be reviewed annually. This allows for the responsible sharing of sensitive data.

The hub event listings are well regarded and heavily used. One of the strengths of having three partners is that businesses have potential access to a very wide range of events, workshops, and surgeries with networking opportunities, hands on advice and useful intelligence. Partners agree there is still more that can be done to exploit their collective capabilities. The hubs also have additional services like Find-A-Desk (hot desking directory) in K&M, BEST offers links to a diverse range of enterprise centres and incubation spaces for start-ups and BES has a strong twitter and Facebook feed.

"I make sure I refer to them – sometimes our firms need something else – it makes my life easier. I can refer to them with confidence. They are good at referring out. They are making sure that firms see the whole picture. They make up a large part of our referrals. I meet them weekly and update and chat."

The Business Navigators are perceived as a strength of the service and businesses appreciate the face-to-face time and the fact someone is listening and acting as a sounding board for their growth aspirations. One District Council officer noted that their Navigator is *"thin on the ground but really good at what they do, dynamic, with a great reputation and very dedicated. We have worked closely together. They would be my first person to go for business support"*.

A variety of ERDF and other funded business support projects and grants have helped to extend the support offered hub Business Navigators and build relationships between hub and the ERDF grant/project coordinators have worked well in terms of knowledge and referrals. For example the link here shows some of the local programmes businesses are referred to in K&M.

Overall the Federated Model has enabled a dedicated local service to be established in each of the three areas within SELEP. The benefits recognised included the ability to provide a staffed service with local, hands-on knowledge that local businesses can directly interact with.

FUTURE DELIVERY AND STRATEGIC DIRECTION

"This closer working would result in more of a 'reputational dividend'".

The LEP is well placed to exploit the UK Shared Prosperity Fund anticipated to replace EU funding. There is more scope for direct intervention with businesses via scaleup support with more intensive client account management. It would be possible to enhance onward signposting (e.g. to DIT) and the quality of leads passed on to others.

"Originally the rationale for Growth Hub was to be a one-stop-shop –the place where all other business support services can be coordinated and brought together in one shop window. Government is steering us away from this – and Growth Hubs are now intended to support high growth potential businesses."

Partners would like support to help businesses to complete public sector paperwork (grant bids etc) by bringing in specialists ("grant jockeys"). This would free up advisers from administrative support to focus on business growth advice. There is an appetite for SEBB2 which could build on the successes and learning from the first programme. The simplification of the skills; training and apprenticeships market would also be well received. The marketplace was described as competitive and confusing for businesses.

There was concern about who would qualify for scaleup support, and whether this would cater for businesses with growth potential, but not yet a 'scaleup' in terms of strict definitions. As emphasis on scaleup increases, it will be important to have a pool of high quality, professional and experienced advisers on hand to deal with this more in-depth approach to support. This requires a very different skill set to light touch support.

There was also concern about an emerging gap for start-up support and general small business support, and some scepticism that the Business Support Helpline and online information systems intended to replace hub services (as the moved into scaleup support) were fit for purpose. Finally – there was concern that there was a risk that the budget was not sufficient to deliver an effective scaleup business support programme.

"What about the businesses who do not qualify as a scaleup, but have potential to grow? How do we identify and help these businesses?"

There was recognition that SELEP and the hubs were dealing with a central Government approach that tended to provide short-term funding for prescribed services, eligibility and outcomes. Stakeholders saw enormous potential from embracing modern technology and social media, as well as expanding face to face activities such as networking and events.

A small number of stakeholders thought that having a SEBH Champion on the SELEP strategic board would help raise their profile and help raise enthusiasm and some focus on decision making regarding business support and advice. There was also some opinion that SELEP and the three hubs could be better informed by practice and lessons learnt in other LEP areas.

The financial stresses impacting local authorities were identified by the bulk of stakeholders as a source of potential future risk to enterprise support provision. Once the current funding sources for the SEBH, ERDF programmes, and local authority economic development budgets expired in the next few years, there was much uncertainty about continuity of funding and services. This was especially evident in the case of SEBB teams who had been adversely affected by last minute decisions on contract renewals. Some staff had been lost to the local authority 'talent pool' as they were not willing to risk waiting for decisions on renewals.

There is some debate over the continued provision of free support as opposed to subsidised provision. Opinion ranges from introducing small charges for events and workshops to developing a business plan to grow future commercial opportunities. Implementing any charging system would need careful consideration but could have a positive impact in terms of how businesses value the support they receive. It could also cut down on dropout rates e.g. workshop attendance or even participation in whole programmes of support.

The shift in focus from start-up to scaleup is understandable up to a point, but many stakeholders believe there is still a need for the former. There is clear demand for mentoring and coaching relationships as well as start-up workshops on general topics such as business rates, recruitment or similar. One stakeholder suggested a roll out of the Pop-Up Business School to support this.

REVIEW OF 2018 RECOMMENDATIONS

The previous evaluation suggested there should be 'careful consideration as to how the new BEIS business data collection requirements are met (Monitoring and Evaluation Framework for Growth Hubs – 2018/19)'. It noted that the SEBH has struggled to a certain extent with robust data collection. The situation has improved but there is still scope for further enhancements to ensure greater consistency (see recommendations). It was noted that the CRM system will improve monitoring. There has been progress here, but one area is yet to be fully aligned with live data (see recommendations).

The previous report asked for a review of scaleup support in light of new BEIS priorities. There has been good progress here with each hub addressing this issue head on. For instance:

- Scaleup East Sussex was set up to work with companies in the Newhaven area that have potential to grow faster and be more successful than they have ever been before. It works with firms to identify barriers to faster growth, work out how to break them down, and unleash the growth potential.
- A BEST scaleup advisor was appointed to work with ambitious scaleup businesses to help maximise their growth potential and scaleup. It involves 'inspiring, motivating and encouraging', linking those businesses to the right services, helping identify growth opportunities and constraints; facilitating the mapping of a 3-year strategic journey for the business and assisting with the development of a 12-month Action Plan.
- K&M has a one year, part funded programme of support for businesses in West Kent that have the capacity and ambition to grow. Scaleup Ashford provide support for companies located in Ashford with the ambition and capacity to grow.

There was a recommendation about the provision of Brexit support for vulnerable sectors. Brexit resources have been available on all three hub websites and regularly updated. That said it was claimed there was scope for further staff training to understand and offer Brexit support and advice (see recommendations).

The final recommendation was to consider if there are alternative options to secure the longer-term resourcing of the SEBH or elements of it. SEBB2 is being pursued and there may be scope from some ERDF follow-on resources but there is more to be done here (see recommendations).

CONCLUSION AND RECOMMENDATIONS

The SEBH has considerable geographical reach, strong stakeholder relations and wide publicity of local services in each area. Overall the Federated Model has enabled a dedicated local service to be established in each of the three areas within the SELEP area. *"The single point of contact is now well established and being delivered across the area."* The benefits recognised included the ability to provide a staffed service with local, hands-on knowledge that local businesses can directly interact with. The next phase of its development should be to maximise the sum of its parts – aligning measurement and resources, and sharing networking, expertise and company intelligence.

RECOMMENDATIONS

In light of the evaluation findings partners may wish to consider the following:

(a) Operational recommendations.

- Encourage partners such as libraries and the FSB to advertise their events on the hub websites free of charge.
- More joint events between the three hubs and more routine cross referral (could the Kent Investor Network be introduced to more prospects elsewhere in the SELEP area?).
- Ensure all three CRM systems are fully aligned.
- Consider new ways to better engage young people, women and ethnic minorities.
- A cross hub marketing plan with appropriate measures and activities to deepen awareness of the brand.
- Training for the SEBH Navigators on helping firms prepare for Brexit.
- More routine aftercare and follow-up.

(b) Strategic recommendations.

- Formalising the SEBH steering group so it directs its efforts towards the collective interests of the SELEP cascading intelligence from all three hubs.
- Using the above to report back on links with national providers to ensure all hubs benefit.
- Deepen links with IUK, Catapults[8], Better Business for All and Be the Business team.
- How the visibility of University and partner business support expertise and events including DIT and FSB could be significantly enhanced.

[8] Target catapults should be aligned with the Enterprise Zones' industrial specialisms e.g. Off-Shore Renewable Energy, Medicine Discovery and High Value Manufacturing.

- Measures to simplify the skills, training and apprenticeships market.
- Lobbying for new resources from the Shared Prosperity Fund and other sources for a new SEBH investment readiness product, SEBB2 and funds to boost the number and capacity of Business Navigators.
- Reflecting on the scaleup pilots, working with The ScaleUp Institute and developing a SELEP wide scaleup programme.
- Engage hubs in the development of the Local Industrial Strategy.

(c) Recommendations on the future monitoring and evaluation.

- Plan for the annual evaluation 2-3 months in advance to allow sufficient time to conduct company surveys, case studies etc.
- How KPIs and monitoring data can be collated much more consistently between the three areas.
    - Although locational data has been made available, this has been collected at the level of towns and other small geographies. These are not formal boundaries such as local authority districts which would make the task of knowing whether areas are adequately supported more difficult.
    - A more clear and consistent method on data collection on sectors is needed by using an agreed level of a standard industrial classification.
    - Enquiry collection methods have varied across the three hubs. These need to be aligned to ensure the hours for each enquiry are recorded consistently.
    - The description of the type of enquiries or advice given (e.g. funding, IT, marketing etc.) should be clearly defined with all three hubs using identical categories.
    - The turnover ranges for companies should be collected consistently. This should be in line with BEIS requirements.
- Whether there is scope to simplify the sharing of company data for evaluation purposes.
- Plan in scaleup impacts to the 2019-2020 evaluation.

ANNEX ONE: LOCAL STATISTICS

Level of Support by Company Beneficiaries 2018/19								
Enquiries	Business Essex, Southend & Thurrock		Business East Sussex		Kent & Medway Business Hub		SELEP Total	
Light touch	649	42.9%	588	73.0%	1,757	83.4%	2,994	67.6%
Medium Intensity	778	51.4%	197	24.4%	298	14.2%	1,273	28.8%
High Intensity	87	5.7%	21	2.6%	51	2.4%	159	3.6%
Total	1,514	100.0%	806	100.0%	2,106	100.0%	4,426	100.0%

Source: Hub Databases, 2018/19, (n=4,426)

Location of Beneficiary Companies by Town and District					
Kent & Medway			BEST		
Medway	314	18.8%	Southend	283	18.9%
Ashford	213	12.8%	Chelmsford	202	13.5%
Maidstone	182	10.9%	Basildon	142	9.5%
Canterbury	168	10.1%	Braintree	129	8.6%
Swale	120	7.2%	Colchester	108	7.2%
Thanet	113	6.8%	Maldon	100	6.7%
Tunbridge Wells	98	5.9%	Rochford	93	6.2%
Tonbridge & Malling	93	5.6%	Thurrock	84	5.6%
Folkestone and Hythe	83	5.0%	Epping Forest	70	4.7%
Dover	73	4.4%	Brentwood	67	4.5%
Sevenoaks	71	4.3%	Tendring	67	4.5%
Dartford	56	3.4%	Castle Point	62	4.1%
Gravesham	54	3.2%	Uttlesford	58	3.9%
Other	31	1.9%	Harlow	32	2.1%
TOTAL	1,669	100.0%	TOTAL	1,497	100.0%

BES		
Hastings	219	27.2%
Rother	174	21.6%
Wealden	151	18.8%
Lewes	126	15.7%
Eastbourne	117	14.5%
Other	18	2.2%
TOTAL	805	100.0%

Source: Hub Databases, 2018/19, (n=3,971),

Employment SME Size-bands 2018/19						
Enquiries	SELEP Beneficiary Companies	BEST	BES	Kent & Medway	SELEP	England
Micro (0-9)	88.6%	90.2%	90.5%	90.1%	90.2%	89.8%
Small (10-49)	9.4%	8.4%	8.2%	8.5%	8.4%	8.6%
Medium (50-249)	2.1%	1.4%	1.3%	1.5%	1.4%	1.6%

Source: Hub Databases, 2018/19, (n=3,976), Business Count, 2018

Beneficiary Companies Sector Breakdown					
SIC Code	Sector	BEST	BES	Kent & Medway	SELEP
A	Agriculture	25	11	7	43
B	Mining Quarrying	1			1
C	Manufacturing	222	54	135	411
D	Utilities	3	6		9
E	Water/Waste	8			8
F	Construction	94	51	67	212
G	Wholesale/Retail	215	54	239	508
H	Transport/Storage	32	9	34	75
I	Accommodation/Food	90	29	82	201
J	Information/Communication	88	22	84	194
K	Finance & Insurance	22	9	30	61
L	Real Estate	18	11		29
M	Professional/Scientific/Tech.	163	62	139	364
N	Admin./Support Services	128	16		144
O	Public Admin/Def./Soc Serv.	6			6
P	Education	65	14	47	126
Q	Human Health/Soc. Work	108	41	77	226
R	Arts/Entertainment	92	132	103	327
S	Other Services	127	125	368	620
T	Other	7	5	257	269
	TOTAL	1,514	651	1,669	3,834

Source: Hub Databases, 2018/19, (n=3,834),

ANNEX TWO: CASE STUDIES

Case Study:

Genix Imaging Draws on Multiple Support Measures via BEST to Accelerate Ambitious Scale-up Plans

KGKgenix

KGK/Genix is one of the UK's most reputable multidisciplinary agencies providing creative, large format print and project management solutions. The business has a strong history dating back over 30 years, employing 85 staff over four sites. It designs and produces large format graphics and display solutions to some of the world's biggest brands including Nike, Gap, Selfridges, Calvin Klein, the Royal Academy of Arts and the National Portrait Gallery. Whilst its history is rooted within the large format print sector, it has evolved and developed into an innovative company embracing new production methods and technologies. The company was looking to expand in Harlow, many of their clients were in central London and they were running out of space at other sites nearby in Fitzrovia, Tottenham and Thundridge, in Hertfordshire.

Their planned expansion of the business coincided with BREXIT resulting in a downturn in the industry and the company needed to invest a considerable sum on the Harlow site, which required some updating to meet their requirements. The cost of other new premises nearby was prohibitive.

The KGK/Genix Team planned to introduce a specialist 'print to fabrics' service, known as 'soft signage'. This concept is relatively new to the UK and KGK/Genix was one of the first to bring in equipment to service this growing market, through support from Business Essex, Southend and Thurrock (BEST) and partners. It has enabled them to print to various types of polyester, a material which has required considerable research and development, to get the product ready for the marketplace. The core materials provide both front and backlit graphics plus a flag and blockout materials. They can also print onto specialist finishes like canvas.

> BEST have been an absolutely enormous help to us at a time when we were establishing new premises in Harlow. They introduced us to a number of ideas which have helped us accelerate the growth of the business. We now employ 11 people at that site.
>
> Ken Pitts
> Group MD at KGK/Genix

Group MD, Ken Pitts first got in touch with Invest Essex. One of their advisors, David Watson spent a day with him visiting all of their sites in the South East and evaluating the business's growth ambitions. David then introduced Ken to a business navigator - Karen Hodgkins at BEST, which is part of the South East Business Hub (SEBH). She outlined relevant grants they would be eligible to apply for from various organisations including NWES, LoCase and BEST themselves. "We applied for all of those Karen recommended and were successful in each case!" claimed Ken.

Initially they applied for capital expenditure items through NWES and BEST (via the South East Business Boost scheme (SEEB)) and then were introduced to the Low Carbon Across the South East (LoCase*) team, where they secured a grant to replace all of their lighting, which the Group MD noted was 'frankly an area we were completely unaware that would be eligible for a grant'. The NWES grant offered £20,000 towards a £100,000 investment in new equipment including a new calender unit, complimenting the new fabric printing device, which prints directly onto fabric. It took some time to get the funding through from NWES and the BEST advisor assisted with this process.

The company was also referred to SEBB by their BEST business navigator. This took the total amount of funding received towards new equipment and premises to well over £40,000. Ken was then informed by

David Watson at Invest Essex about the possibility of R&D tax credits and KGK/Genix has since been able to secure tax rebates for activities carried out in various parts of the business.

"That in itself has accelerated the business and allowed us to get ahead of the investment curve and employ new staff sooner than we otherwise would have done" noted Ken.

The team at KGK/Genix were introduced to expert advisors who helped them with an SME R&D tax relief application and have represented the company and submitted claims over the last two tax years. The R&D into each fabric is quite extensive, so expenditure in this area is considerable and consequently the company tries to restrict itself to the manufacture of half a dozen or so core products.

The company has been able to buy a 3.2-metre wide ultra-high resolution soft signage printer with the latest technology for fabric display graphics with high production speeds. They also purchased a second automated sewing station which sews a silicon strip onto the edge of a fabric to allow the product to fit into a frame, so that it is easily installed and very portable. What would have previously required a large van and two installers can now be sent directly to the client in a plastic bag.

Fabric dying previously used a large volume of water. The new machine only uses five litres of water per day so there is a huge resource efficiency saving. KGK/Genix also used some of the grant money to build a special temperature and humidity-controlled room with a high-speed roller shutter door to control the printing process as the variation in seasonal temperatures and humidity affects how the fabric prints and performs.

"These new investments have reduced our carbon footprint considerably and make it less expensive for the customer. We are constantly striving to embrace new technologies and ideas and we see continuation of this process as key to our future success," Ken Pitts Group MD at KGK/Genix

"The signposting from BEST to the grants and support has allowed us to invest in other areas and bring our expansion and investments forward and that, in turn, has led to an increase in our headcount. The jobs created vary from trainees to sew fabrics and run machines that cut, trim and fold manufactured products to printers and positions in the pre-press unit which are aligned with graphic design. We have employed two people locally in pre-press and taken on administration staff. We are about to embark on an apprenticeship scheme after an introduction to a contact that represents several colleges". Ken Pitts Group MD at Genix.

“

The advisors at Invest Essex and BEST seem to work very closely together. They are a combination that works very well.

Ken Pitts
Group MD at KGK/Genix

Their BEST business navigator introduced Ken to BEST's up-scaling mentor and the company has had several sessions with a view to developing a marketing plan and recruiting a specialist to implement it. Ken keeps in touch with both his Invest Essex and BEST advisors. He was recently referred to a specialist IT finance provider, who also offers support in equipment sourcing, with a view to upgrading the firm's computer systems.

Summing up, Ken noted KGK/Genix currently has six vacancies as a result of the investments, four of which are brand new positions, based in the new Harlow premises. In terms of professionalism and friendliness Ken said his BEST advisor was 'spot on' and would give her 'ten out of ten'.

"It's been first class really simply because we were not aware that this kind of support was available and have found it absolutely invaluable. It's been a really worthwhile experience for us and I wouldn't hesitate to recommend it to other businesses".

Case Study:

90 Year Old Family Coach Business Helped to Invest in New Low Emission Vehicles

Empress coaches are a Hastings based coach and minibus company covering East Sussex and further afield. It has a full range of coaches including modern and classic 12, 16, 22 and 28 seaters for school, corporate travel, sports clubs, wedding parties and other trips (the image shows a 1963 heritage model). Empress, established in 1929, is still a family run business. Since 1999 it has been owned by Stephen Dine. Their firm prides itself on high service standards and has customers making repeat bookings every year.

Stephen got in touch with a business navigator at Business East Sussex (BES) looking for financial support to upgrade their fleet (see later). He found out about BES through the Let's Do Business (South East) Group Limited[1] who initially got in touch with him. He rated the quality of the support and friendliness of his navigator as very good and felt he received a good diagnosis of his requirement.

The business had an urgent requirement to upgrade their ageing fleet in advance of a new global emission standard in Central London to help reduce toxic air pollution introduced on the 8th of April (2019). All buses operating in the new Ultra Low Emission Zone (ULEZ) now have to meet or exceed the prescribed emission standards. "I'd already been saying that this [Euro 6 compliance requirement] will become a problem for us" noted Stephen.

Their business navigator thought the South East Business Boost (SEBB) programme, which offered growth grants to SMEs, would be just right for Empress. "Understanding our business need was the catalyst for the grant application" Stephen noted. Their advisor organised a number of introductory meetings, obtained the necessary paperwork and explained carefully the various stages of the process. Stephen noted:

"They knew what they were doing, they were really 'on it'. It was nice to see an organisation that wants to see you try and secure local support. They wanted to support us and help us along the way".

As a result of the BES referral the SEBB funding enabled the firm to buy their first new vehicle in 27 years (see image overleaf). Stephen said the high cost of new vehicles was beyond the means of a typical small transport operator. Their application to SEBB was approved and "we were very lucky to buy a new 22-seat coach" Stephen said.

> "Our BES advisor had a lightbulb moment and thought we needed to know about it. He could see it was very clear that if we weren't able to get some Euro 6 standard vehicles into the fleet it would pull us backwards. We are just over 60 miles from London and of course it is one of the big draws for tourism. You can't run a coach business without going to London
>
> Owner Stephen Dine

[1] A Social Enterprise helping businesses to start-up and grow throughout the South East of England and contracted to deliver the Growth Hub in East Sussex (part of the South East Business Hub).

“

And with that [the new second-hand vehicle] one complementing the new vehicle it has safeguarded jobs at the firm. We've secured two jobs that would have been lost and created two new part-time positions as a result of the support

Owner Stephen Dine

Stephen claims the support from their BES navigator and the subsequent grant has made a huge difference. Before the new coach arrived, the firm was slowly putting the brakes on bookings to London in advance of the ULEZ. It came into force last month and next year the zone will spread outwards from the current 'inner ring' of the zone. Currently if you don't comply you are fined £100 a day which rises to £200 a day next year Stephen added.

The firm's older 22-seat vehicle was getting very costly to maintain, Stephen explained.

“We keep everything maintained to a high standard and your money can haemorrhage keeping an ageing fleet operational. The brand new one is wonderful, you've got no mileage on the clock and, because it's not bought second-hand, you are not fixing other operator's misdemeanours. It has actually helped to keep some of our operational costs down and lifted our profile and made us much more attractive to potential hirers”.

The company's analysis shows that customers are honing in on the new vehicle on the firm's website and their booking system shows that it's by far the most popular. Empress has also managed to sell off two non-Euro 6 compliant vehicles and purchase another recent second-hand Euro 6 vehicle which has had quite an effect on the firm.

Stephen claimed, “the initial signposting [from the BES Business Navigator] was everything because, if we hadn't had that, we'd have just been nowhere”. Since Stephen's predecessor last bought new vehicles (in 1990) the cost of new purchases has increased substantially against hire charges which have, in real terms, reduced compared to operational costs.

“Once or twice over the years I've got close to be able buy new vehicles and never quite made it. So you are trapped in a cycle of always buying high mileage, second-hand stock which needs a lot of straightening-out. If it hadn't been for the grant money there is no way we could have done it. It's always just been beyond reach”.

There are wider benefits too. Stephen recognises that the firm's environmental impact will reduce substantially due to the cleaner, quieter vehicles (“they are so quiet you don't realise they have gone”). Summing up the experience Stephen said “the firm has survived a world war, a depression, two recessions and two fuel crises but you can be complacent anymore. You have keep looking ahead, keep an eye on the future”. The firm is still touch with their BES business navigator and hoping to attend a training course later in the year on marketing and business costings.

“BES always keep us in the loop and make us aware of what is available. They have broad portfolio of support they can offer”. Owner Stephen Dine

Case Study:

Kent based Entrepreneur Seeks Start-Up Advice on a New Arts Business Aimed at Young Children

Deal based Little Artists provide art classes for young children in primary schools and nurseries. The business is a new start-up run by Tanya Foy who was a former early years primary school teacher. Tanya contacted the Kent & Medway Growth Hub after seeing it advertised on social media. She was sent literature and allocated an adviser to help her with starting her business. Tanya was looking for advice with managing company finances, a business plan and other professional advice.

"If I hadn't had this help I would still be going around in circles. He [the advisor] made me think about how much I could earn from each service, where the biggest potential was for making a profit; how much to charge when factoring in costs and preparation work; and made me realise what I had to earn, and how many hours I needed to work to make a go of it."

After one year the business had grown from a single nursery contract to working with a number of nurseries, schools and local centres; much of it repeat work. Tanya has also joined 'Ladies that Latte', which is a network of women who run their own businesses and meet once a month so they can share experiences.

> He [the advisor] listened to my ideas, broke down what I needed to do including obtaining the right public liability insurance, recording cashflow, identifying resources and expenses and helped me to prioritise everything.
>
> Tanya Foy

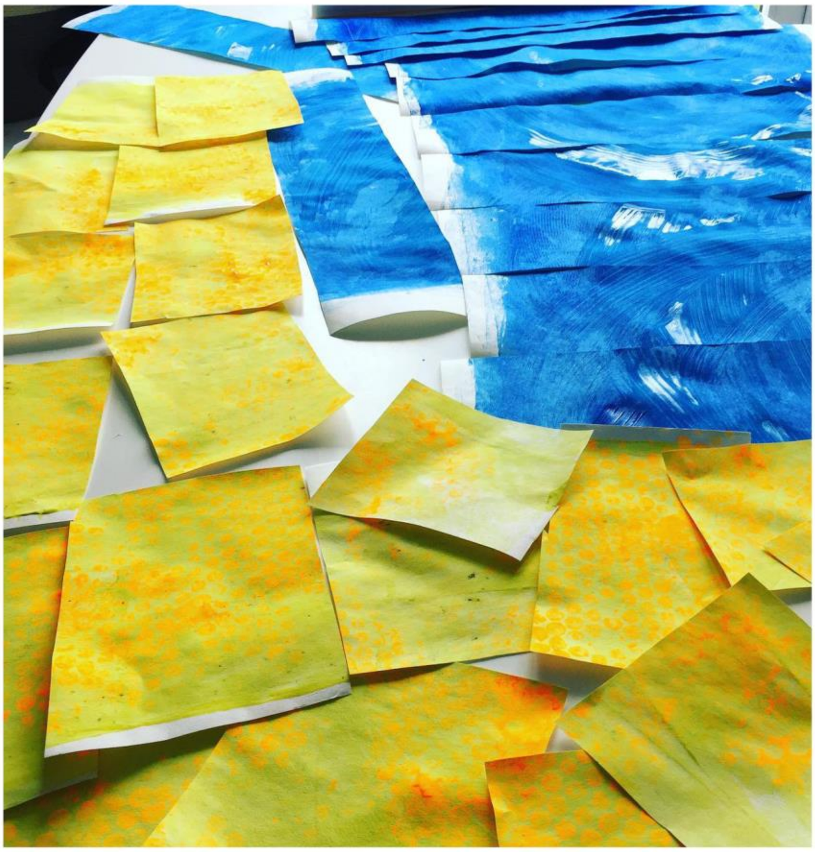
Tanya was starting from scratch and had to build her customer base. This, combined with the cost of equipment and materials, has meant that the business in its first year had made a loss. However, with all the ground work now in place Little Artists is certain to make a profit in its second year.

Looking ahead, Tanya has recently attended a training course which has allowed her to issue children with a nationally recognised qualification called 'The Arts Award'. She wants to branch out further and is due to promote the business to more nurseries. By running more classes, the next challenge would be to employ an assistant.

Reflecting on her achievements so far,

"I am now working every day getting regular work and can confidently say that Little Artists is a success."

> I cannot speak highly enough of the help I have received from the Growth Hub and would like to go back to them when I am ready to employ someone.
>
> Tanya Foy



ANNEX THREE: DETAILED SURVEY RESULTS BY HUB

Source: KADA Business Survey 2019 for all the following.

Which of the following categories, if any, best describes the stage your company is at?

	Light Touch							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Pre-start	9	12.0%	0	0.0%	6	13.0%	**15**	**10.3%**
Start-up	21	28.0%	9	37.5%	17	37.0%	**47**	**32.4%**
Steady grower	26	34.7%	4	16.7%	12	26.1%	**42**	**29.0%**
Fast Grower	0	0.0%	1	4.2%	2	4.3%	**3**	**2.1%**
Established	15	20.0%	8	33.3%	7	15.2%	**30**	**20.7%**
Neither of the above/Unsure	1	1.3%	1	4.2%	0	0.0%	**2**	**1.4%**
Other (please specify)	3	4.0%	1	4.2%	2	4.3%	**6**	**4.1%**
Totals	**75**	**100.0%**	**24**	**100.0%**	**46**	**100.0%**	**145**	**100.0%**

Which areas of advice and support were you looking for or interested in when you first came into contact with Business East Sussex?

	Light Touch							
	BES (n=72)		BEST (n=18)		K&M (n=40)		Total	
	n	%	n	%	n	%	n	%
Business finance / loans / grants	35	48.6%	11	61.1%	28	70.0%	**74**	**56.9%**
Business growth advice and support	26	36.1%	6	33.3%	9	22.5%	**41**	**31.5%**
Business start-up advice and support	19	26.4%	8	44.4%	12	30.0%	**39**	**30.0%**
Skills and training	26	36.1%	2	11.1%	7	17.5%	**35**	**26.9%**
Other (please specify)	7	9.7%	1	5.6%	3	7.5%	**11**	**8.5%**
Nothing specific / General advice	5	6.9%	1	5.6%	3	7.5%	**9**	**6.9%**
Broadband, IT and digital support	5	6.9%	0	0.0%	2	5.0%	**7**	**5.4%**
International trade and exporting	1	1.4%	1	5.6%	4	10.0%	**6**	**4.6%**
Innovation / new products / new processes / R&D	2	2.8%	0	0.0%	4	10.0%	**6**	**4.6%**
High growth support	0	0.0%	1	5.6%	2	5.0%	**3**	**2.3%**
Energy and resource efficiency support	1	1.4%	1	5.6%	1	2.5%	**3**	**2.3%**
Not applicable	1	1.4%	0	0.0%	0	0.0%	**1**	**0.8%**
Don't know	0	0.0%	0	0.0%	0	0.0%	**0**	**0.0%**

	Medium and High Intensity							
	BES (n=19)		BEST (n=36)		K&M (n=4)		Total	
	n	%	n	%	n	%	n	%
Business finance / loans / grants	16	84.2%	31	86.1%	4	100.0%	**51**	**86.4%**
Business growth advice and support	10	52.6%	23	63.9%	3	75.0%	**36**	**61.0%**
Business start-up advice and support	7	36.8%	10	27.8%	2	50.0%	**19**	**32.2%**
Skills and training	6	31.6%	7	19.4%	2	50.0%	**15**	**25.4%**
Innovation / new products / new processes / R&D	5	26.3%	7	19.4%	2	50.0%	**14**	**23.7%**
Broadband, IT and digital support	4	21.1%	5	13.9%	0	0.0%	**9**	**15.3%**
International trade and exporting	2	10.5%	5	13.9%	1	25.0%	**8**	**13.6%**
High growth support	0	0.0%	7	19.4%	0	0.0%	**7**	**11.9%**
Energy and resource efficiency support	1	5.3%	5	13.9%	0	0.0%	**6**	**10.2%**
Other (please specify)	2	10.5%	2	5.6%	1	25.0%	**5**	**8.5%**
Nothing specific / General advice	0	0.0%	0	0.0%	0	0.0%	**0**	**0.0%**
Don't know	0	0.0%	0	0.0%	0	0.0%	**0**	**0.0%**
Not applicable	0	0.0%	0	0.0%	0	0.0%	**0**	**0.0%**

If you engaged with the Growth Hub via the phone, e-mail or the website, how would you rate the knowledge and experience of the advisor you contacted?

Light Touch

BES - Light Touch (n=72)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Friendliness	70.8%	51	13.9%	10	6.9%	5	0.0%	0	0.0%	0	8.3%	6
Professionalism	61.1%	44	19.4%	14	9.7%	7	1.4%	1	0.0%	0	8.3%	6
Relevance and quality of support	52.8%	38	25.0%	18	5.6%	4	2.8%	2	5.6%	4	8.3%	6
Understanding of your requirements or inquiry	51.4%	37	27.8%	20	5.6%	4	4.2%	3	4.2%	3	6.9%	5
Understanding of your business / organisation	40.3%	29	30.6%	22	9.7%	7	5.6%	4	5.6%	4	8.3%	6

BEST - Light Touch (n=18)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Friendliness	50.0%	9	22.2%	4	5.6%	1	0.0%	0	0.0%	0	22.2%	4
Relevance and quality of support	38.9%	7	11.1%	2	22.2%	4	5.6%	1	0.0%	0	22.2%	4
Professionalism	38.9%	7	22.2%	4	16.7%	3	0.0%	0	0.0%	0	22.2%	4
Understanding of your requirements or inquiry	33.3%	6	16.7%	3	27.8%	5	0.0%	0	0.0%	0	22.2%	4
Understanding of your business / organisation	27.8%	5	27.8%	5	16.7%	3	0.0%	0	0.0%	0	27.8%	5

K&M - Light Touch (n=40)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Friendliness	37.5%	15	27.5%	11	10.0%	4	2.5%	1	7.5%	3	15.0%	6
Professionalism	30.0%	12	35.0%	14	10.0%	4	5.0%	2	5.0%	2	15.0%	6
Understanding of your requirements or inquiry	25.0%	10	30.0%	12	17.5%	7	5.0%	2	7.5%	3	15.0%	6
Understanding of your business / organisation	22.5%	9	35.0%	14	12.5%	5	7.5%	3	7.5%	3	15.0%	6
Relevance and quality of support	22.5%	9	27.5%	11	17.5%	7	5.0%	2	12.5%	5	15.0%	6

Medium and High

BES - Medium and High (n=19)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Friendliness	68.0%	13	21.0%	4	5.0%	1	0.0%	0	0.0%	0	5.0%	1
Professionalism	58.0%	11	26.0%	5	11.0%	2	0.0%	0	0.0%	0	5.0%	1
Understanding of your business / organisation	53.0%	10	16.0%	3	26.0%	5	0.0%	0	0.0%	0	5.0%	1
Understanding of your requirements or inquiry	47.0%	9	37.0%	7	11.0%	2	0.0%	0	0.0%	0	5.0%	1
Relevance and quality of support	42.0%	8	37.0%	7	16.0%	3	0.0%	0	0.0%	0	5.0%	1

BEST - Medium and High (n=36)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Friendliness	83.0%	30	14.0%	5	0.0%	0	0.0%	0	0.0%	0	3.0%	1
Professionalism	78.0%	28	19.0%	7	0.0%	0	0.0%	0	0.0%	0	3.0%	1
Understanding of your requirements or inquiry	64.0%	23	25.0%	9	3.0%	1	3.0%	1	0.0%	0	6.0%	2
Understanding of your business / organisation	61.0%	22	17.0%	6	11.0%	4	0.0%	0	3.0%	1	8.0%	3
Relevance and quality of support	50.0%	18	31.0%	11	8.0%	3	0.0%	0	3.0%	1	8.0%	3

K&M - Medium and High (n=4)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Friendliness	75.0%	3	25.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Professionalism	50.0%	2	50.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Understanding of your business / organisation	25.0%	1	25.0%	1	50.0%	2	0.0%	0	0.0%	0	0.0%	0
Understanding of your requirements or inquiry	25.0%	1	50.0%	2	25.0%	1	0.0%	0	0.0%	0	0.0%	0
Relevance and quality of support	25.0%	1	50.0%	2	0.0%	0	25.0%	1	0.0%	0	0.0%	0

As a result of engaging with the Growth Hub, do you feel that you are more likely or less likely to meet your growth aspirations?

	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Much more likely	4	21.0%	14	39.0%	1	25.0%	**19**	**32.2%**
More likely	10	53.0%	19	53.0%	2	50.0%	**31**	**52.5%**
No difference	5	26.0%	2	6.0%	0	0.0%	**7**	**11.9%**
Less likely	0	0.0%	0	0.0%	0	0.0%	**0**	**0.0%**
Much less likely	0	0.0%	1	3.0%	1	25.0%	**2**	**3.4%**
Totals	**19**	**100.0%**	**36**	**101.0%**	**4**	**100.0%**	**59**	**100.0%**

Has engaging with Business East Sussex made you more likely or less likely to access business support in the future?

	Light Touch							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Much more likely	29	40.3%	3	16.7%	8	20.0%	**40**	**30.8%**
More likely	21	29.2%	12	66.7%	15	37.5%	**48**	**36.9%**
No difference	13	18.1%	1	5.6%	8	20.0%	**22**	**16.9%**
Less likely	3	4.2%	2	11.1%	4	10.0%	**9**	**6.9%**
Much less likely	6	8.3%	0	0.0%	5	12.5%	**11**	**8.5%**
Totals	**72**	**100.0%**	**18**	**100.0%**	**40**	**100.0%**	**130**	**100.0%**

	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Much more likely	6	32.0%	23	64.0%	3	75.0%	**32**	**54.2%**
More likely	9	47.0%	9	25.0%	0	0.0%	**18**	**30.5%**
No difference	1	5.0%	3	8.0%	1	25.0%	**5**	**8.5%**
Less likely	2	11.0%	1	3.0%	0	0.0%	**3**	**5.1%**
Much less likely	1	5.0%	0	0.0%	0	0.0%	**1**	**1.7%**
Totals	**19**	**100.0%**	**36**	**100.0%**	**4**	**100.0%**	**59**	**100.0%**

How likely would you be to recommend the Growth Hub to a friend or colleague?

	Light Touch							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Very likely	41	56.9%	8	44.4%	15	37.5%	**64**	**49.2%**
Likely	16	22.2%	6	33.3%	11	27.5%	**33**	**25.4%**
Neutral	5	6.9%	2	11.1%	5	12.5%	**12**	**9.2%**
Unlikely	3	4.2%	1	5.6%	2	5.0%	**6**	**4.6%**
Very unlikely	7	9.7%	1	5.6%	7	17.5%	**15**	**11.5%**
Totals	**72**	**100.0%**	**18**	**100.0%**	**40**	**100.0%**	**130**	**100.0%**

How satisfied are you with your experience of the Growth Hub overall?

	Light Touch							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Very satisfied	44	61.1%	7	38.9%	16	40.0%	**67**	**51.5%**
Somewhat satisfied	13	18.1%	6	33.3%	5	12.5%	**24**	**18.5%**
Neither satisfied nor dissatisfied	5	6.9%	4	22.2%	9	22.5%	**18**	**13.8%**
Somewhat dissatisfied	4	5.6%	1	5.6%	3	7.5%	**8**	**6.2%**
Very dissatisfied	6	8.3%	0	0.0%	7	17.5%	**13**	**10.0%**
Totals	**72**	**100.0%**	**18**	**100.0%**	**40**	**100.0%**	**130**	**100.0%**

	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Very satisfied	9	47.4%	27	75.0%	2	50.0%	**38**	**64.4%**
Somewhat satisfied	6	31.6%	6	16.7%	1	25.0%	**13**	**22.0%**
Neither satisfied nor dissatisfied	2	10.5%	2	5.6%	0	0.0%	**4**	**6.8%**
Somewhat dissatisfied	2	10.5%	0	0.0%	1	25.0%	**3**	**5.1%**
Very dissatisfied	0	0.0%	1	2.8%	0	0.0%	**1**	**1.7%**
Totals	**19**	**100.0%**	**36**	**100.0%**	**4**	**100.0%**	**59**	**100.0%**

Were you referred or signposted to any other services?

	Light Touch							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Yes	41	56.9%	8	44.4%	15	37.5%	**64**	**49.2%**
No/Unsure	31	43.1%	10	55.6%	25	62.5%	**66**	**50.8%**
Totals	**72**	**100.0%**	**18**	**100.0%**	**40**	**100.0%**	**130**	**100.0%**

	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Yes	6	32.0%	16	44.0%	2	50.0%	**24**	**40.7%**
No/Unsure	13	68.0%	20	56.0%	2	50.0%	**35**	**59.3%**
Totals	**19**	**100.0%**	**36**	**100.0%**	**4**	**100.0%**	**59**	**100.0%**

How would you rate the quality of the Growth Hub referral process or any signposting you received?

Light Touch

BES - Light Touch (n=39)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
The relevance of the organisation(s) you were referred to / signposted to	61.5%	24	33.3%	13	0.0%	0	0.0%	0	0.0%	0	5.1%	2
The speed of the enquiry handling	59.0%	23	23.1%	9	7.7%	3	2.6%	1	0.0%	0	7.7%	3
The quality of the organisation(s) you were referred to / signposted to	51.3%	20	30.8%	12	2.6%	1	0.0%	0	0.0%	0	15.4%	6
The ability of the referred / signposted organisation(s) to meet your business needs	48.7%	19	20.5%	8	10.3%	4	2.6%	1	0.0%	0	18.0%	7

BEST - Light Touch (n=8)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
The speed of the enquiry handling	50.0%	4	25.0%	2	0.0%	0	0.0%	0	0.0%	0	25.0%	2
The relevance of the organisation(s) you were referred to / signposted to	50.0%	4	25.0%	2	12.5%	1	0.0%	0	0.0%	0	12.5%	1
The quality of the organisation(s) you were referred to / signposted to	37.5%	3	37.5%	3	0.0%	0	0.0%	0	0.0%	0	25.0%	2
The ability of the referred / signposted organisation(s) to meet your business needs	37.5%	3	37.5%	3	0.0%	0	0.0%	0	0.0%	0	25.0%	2

K&M - Light Touch (n=14)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
The relevance of the organisation(s) you were referred to / signposted to	35.7%	5	42.9%	6	0.0%	0	7.1%	1	0.0%	0	14.3%	2
The quality of the organisation(s) you were referred to / signposted to	35.7%	5	42.9%	6	0.0%	0	7.1%	1	0.0%	0	14.3%	2
The ability of the referred / signposted organisation(s) to meet your business needs	35.7%	5	42.9%	6	0.0%	0	7.1%	1	0.0%	0	14.3%	2
The speed of the enquiry handling	21.4%	3	50.0%	7	14.3%	2	0.0%	0	0.0%	0	14.3%	2

Medium and High

BES - Medium and High (n=6)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
The relevance of the organisation(s) you were referred to / signposted to	83.0%	5	17.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The quality of the organisation(s) you were referred to / signposted to	50.0%	3	50.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The ability of the referred / signposted organisation(s) to meet your business needs	50.0%	3	50.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The speed of the enquiry handling	33.0%	2	50.0%	3	17.0%	1	0.0%	0	0.0%	0	0.0%	0

BEST - Medium and High (n=16)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
The speed of the enquiry handling	81.0%	13	6.0%	1	0.0%	0	13.0%	2	0.0%	0	0.0%	0
The relevance of the organisation(s) you were referred to / signposted to	63.0%	10	19.0%	3	13.0%	2	0.0%	0	0.0%	0	6.0%	1
The quality of the organisation(s) you were referred to / signposted to	63.0%	10	19.0%	3	0.0%	0	6.0%	1	0.0%	0	13.0%	2
The ability of the referred / signposted organisation(s) to meet your business needs	63.0%	10	13.0%	2	6.0%	1	6.0%	1	0.0%	0	13.0%	2

K&M -Medium and High (n=2)	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
The speed of the enquiry handling	100.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The relevance of the organisation(s) you were referred to / signposted to	100.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The quality of the organisation(s) you were referred to / signposted to	100.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The ability of the referred / signposted organisation(s) to meet your business needs	100.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

How easy would you have found it to access the products and services you were referred to without the support given?

	Light Touch							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Very easy	9	23.1%	2	25.0%	3	21.4%	**14**	**23.0%**
Easy	3	7.7%	1	12.5%	1	7.1%	**5**	**8.2%**
Neutral	10	25.6%	0	0.0%	6	42.9%	**16**	**26.2%**
Hard	9	23.1%	3	37.5%	1	7.1%	**13**	**21.3%**
Very hard	3	7.7%	0	0.0%	0	0.0%	**3**	**4.9%**
Don't know/not applicable	5	12.8%	2	25.0%	3	21.4%	**10**	**16.4%**
Totals	39	100.0%	8	100.0%	14	100.0%	61	100.0%

	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Very easy	0	0.0%	0	0.0%	0	0.0%	**0**	**0.0%**
Easy	1	17.0%	1	6.0%	1	50.0%	**3**	**12.5%**
Neutral	0	0.0%	4	25.0%	0	0.0%	**4**	**16.7%**
Hard	5	83.0%	6	38.0%	1	50.0%	**12**	**50.0%**
Very hard	0	0.0%	4	25.0%	0	0.0%	**4**	**16.7%**
Don't know/not applicable	0	0.0%	1	6.0%	0	0.0%	**1**	**4.2%**
Totals	6	100.0%	16	100.0%	2	100.0%	24	100.0%

How long would it have taken you to find the support you were looking for without the Growth Hub?

	Light Touch							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Significantly longer without the Growth Hub	20	51.3%	2	25.0%	4	28.6%	**26**	**42.6%**
Slightly longer	5	12.8%	3	37.5%	3	21.4%	**11**	**18.0%**
About the same amount of time	2	5.1%	0	0.0%	0	0.0%	**2**	**3.3%**
Slightly quicker	0	0.0%	1	12.5%	0	0.0%	**1**	**1.6%**
Significantly quicker without the Growth Hub	1	2.6%	0	0.0%	1	7.1%	**2**	**3.3%**
I would not have accessed the support without the Growth Hub	5	12.8%	1	12.5%	0	0.0%	**6**	**9.8%**
Don't know/Not applicable	6	15.4%	1	12.5%	6	42.9%	**13**	**21.3%**
Totals	39	100.0%	8	100.0%	14	100.0%	61	100.0%

	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Significantly longer without the Growth Hub	4	67.0%	10	63.0%	2	100.0%	**16**	**66.7%**
Slightly longer	1	17.0%	4	25.0%	0	0.0%	**5**	**20.8%**
About the same amount of time	0	0.0%	0	0.0%	0	0.0%	**0**	**0.0%**
Slightly quicker	0	0.0%	0	0.0%	0	0.0%	**0**	**0.0%**
Significantly quicker without the Growth Hub	0	0.0%	0	0.0%	0	0.0%	**0**	**0.0%**
I would not have accessed the support without the Growth Hub	0	0.0%	1	6.0%	0	0.0%	**1**	**4.2%**
Don't know/Not applicable	1	17.0%	1	6.0%	0	0.0%	**2**	**8.3%**
Totals	6	101.0%	16	100.0%	2	100.0%	24	100.0%

How would you rate the ease or difficulty of finding information about business support generally in your area?

	Light Touch							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Very easy	4	5.9%	2	11.1%	2	5.1%	**8**	**6.4%**
Easy	14	20.6%	3	16.7%	4	10.3%	**21**	**16.8%**
Neither easy nor difficult	35	51.5%	10	55.6%	17	43.6%	**62**	**49.6%**
Difficult	13	19.1%	2	11.1%	10	25.6%	**25**	**20.0%**
Very difficult	2	2.9%	1	5.6%	6	15.4%	**9**	**7.2%**
Totals	**68**	**100.0%**	**18**	**100.0%**	**39**	**100.0%**	**125**	**100.0%**

	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Very easy	2	11.0%	1	3.0%	1	25.0%	**4**	**6.8%**
Easy	5	26.0%	7	19.0%	0	0.0%	**12**	**20.3%**
Neither easy nor difficult	11	58.0%	14	39.0%	0	0.0%	**25**	**42.4%**
Difficult	1	5.0%	9	25.0%	1	25.0%	**11**	**18.6%**
Very difficult	0	0.0%	5	14.0%	2	50.0%	**7**	**11.9%**
Totals	**19**	**100.0%**	**36**	**100.0%**	**4**	**100.0%**	**59**	**100.0%**

How would you rate the quality and usability of the Growth Hub websites?

Light Touch

BES - Light Touch	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Look, feel and content	20.6%	14	33.8%	23	13.2%	9	5.9%	4	1.5%	1	25.0%	17
Site navigation, functionality and finding information	19.1%	13	33.8%	23	14.7%	10	4.4%	3	1.5%	1	26.5%	18

BEST - Light Touch	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Look, feel and content	22.2%	4	33.3%	6	11.1%	2	0.0%	0	0.0%	0	33.3%	6
Site navigation, functionality and finding information	16.7%	3	38.9%	7	11.1%	2	0.0%	0	0.0%	0	33.3%	6

K&M - Light Touch	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Look, feel and content	18.0%	7	18.0%	7	20.5%	8	10.3%	4	2.6%	1	30.8%	12
Site navigation, functionality and finding information	18.0%	7	15.4%	6	23.1%	9	7.7%	3	5.1%	2	30.8%	12

Medium and High

BES - Medium and High	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Look, feel and content	5.0%	1	37.0%	7	26.0%	5	0.0%	0	5.0%	1	26.0%	5
Site navigation, functionality and finding information	0.0%	0	37.0%	7	26.0%	5	0.0%	0	5.0%	1	32.0%	6

BEST - Medium and High	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Look, feel and content	14.0%	5	25.0%	9	28.0%	10	3.0%	1	0.0%	0	31.0%	11
Site navigation, functionality and finding information	8.0%	3	39.0%	14	17.0%	7	3.0%	1	0.0%	0	31.0%	11

K&M - Medium and High	Very good		Good		Adequate		Poor		Very poor		Not applicable	
	%	n	%	n	%	n	%	n	%	n	%	n
Look, feel and content	25.0%	1	0.0%	0	25.0%	1	25.0%	1	0.0%	0	25.0%	1
Site navigation, functionality and finding information	25.0%	1	0.0%	0	25.0%	1	0.0%	0	0.0%	0	50.0%	2

Are there any improvements you would like to see made to the support offered through the Growth Hubs?

	Light Touch							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Yes	24	39.3%	4	25.0%	16	44.4%	**44**	**38.9%**
No	37	60.7%	12	75.0%	20	55.6%	**69**	**61.1%**
Totals	**61**	**100.0%**	**16**	**100.0%**	**36**	**100.0%**	**113**	**100.0%**

	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Yes	8	42.0%	14	39.0%	2	50.0%	**24**	**40.7%**
No	11	58.0%	22	61.0%	2	50.0%	**35**	**59.3%**
Totals	**19**	**100.0%**	**36**	**100.0%**	**4**	**100.0%**	**59**	**100.0%**

Are there any of the following areas that you might welcome future support to help grow your business?

	Light Touch							
	BES (n=62)		BEST (n=18)		K&M (n=37)		Total	
	n	%	n	%	n	%	n	%
Funding and Finance	24	38.7%	11	61.1%	19	51.4%	**54**	**46.2%**
Social media, on-line marketing &/or on-line presence	34	54.8%	7	38.9%	13	35.1%	**54**	**46.2%**
General business growth assistance or advice	30	48.4%	9	50.0%	13	35.1%	**52**	**44.4%**
Networking, collaborations or space to meet	23	37.1%	8	44.4%	13	35.1%	**44**	**37.6%**
Strategic business advice, mentoring, management or leadership training	20	32.3%	9	50.0%	12	32.4%	**41**	**35.0%**
Skills and training	22	35.5%	8	44.4%	10	27.0%	**40**	**34.2%**
New ideas, R&D or protecting your work	11	17.7%	5	27.8%	8	21.6%	**24**	**20.5%**
Specific advice for my sector	11	17.7%	3	16.7%	10	27.0%	**24**	**20.5%**
Digital technologies or new technologies more generally	9	14.5%	4	22.2%	6	16.2%	**19**	**16.2%**
Capital, sites and premises	8	12.9%	3	16.7%	6	16.2%	**17**	**14.5%**
New markets including international trade	9	14.5%	3	16.7%	4	10.8%	**16**	**13.7%**
Preparations for Brexit	4	6.5%	2	11.1%	4	10.8%	**10**	**8.5%**
Investment readiness	5	8.1%	4	22.2%	0	0.0%	**9**	**7.7%**
Other (please specify)	5	8.1%	1	5.6%	3	8.1%	**9**	**7.7%**
Don't know or not applicable	3	4.8%	0	0.0%	5	13.5%	**8**	**6.8%**

Have you achieved any of the following benefits or are you likely to in the next 12 months or so?

Increased turnover	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Achieved already	3	16%	10	28%	1	25%	**14**	**24%**
Expect to achieve at a future date	6	32%	16	44%	2	50%	**24**	**41%**
May achieve at a future date	8	42%	7	19%	0	0%	**15**	**25%**
Not achieved and don't expect to	1	5%	0	0%	1	25%	**2**	**3%**
Don't Know	0	0%	0	0%	0	0%	**0**	**0%**
Not applicable	1	5%	3	8%	0	0%	**4**	**7%**
Totals	19	100%	36	99%	4	100%	59	100%

Increased profit	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Achieved already	1	5%	6	17%	0	0%	**7**	**12%**
Expect to achieve at a future date	9	47%	16	44%	3	75%	**28**	**47%**
May achieve at a future date	6	32%	11	31%	0	0%	**17**	**29%**
Not achieved and don't expect to	2	11%	0	0%	1	25%	**3**	**5%**
Don't Know	0	0%	0	0%	0	0%	**0**	**0%**
Not applicable	1	5%	3	8%	0	0%	**4**	**7%**
Totals	19	100%	36	100%	4	100%	59	100%

Confidence in managing your business	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Achieved already	9	47%	14	39%	1	25%	**24**	**41%**
Expect to achieve at a future date	4	21%	13	36%	2	50%	**19**	**32%**
May achieve at a future date	3	16%	5	14%	0	0%	**8**	**14%**
Not achieved and don't expect to	2	11%	1	3%	1	25%	**4**	**7%**
Don't Know	0	0%	0	0%	0	0%	**0**	**0%**
Not applicable	1	5%	3	8%	0	0%	**4**	**7%**
Totals	19	100%	36	100%	4	100%	59	100%

Entered / diversified into new markets	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Achieved already	1	5%	9	25%	0	0%	**10**	**17%**
Expect to achieve at a future date	7	37%	9	25%	2	50%	**18**	**31%**
May achieve at a future date	3	16%	5	14%	0	0%	**8**	**14%**
Not achieved and don't expect to	4	21%	6	17%	2	50%	**12**	**20%**
Don't Know	2	11%	1	3%	0	0%	**3**	**5%**
Not applicable	2	11%	6	17%	0	0%	**8**	**14%**
Totals	19	101%	36	101%	4	100%	59	100%

New products or services	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Achieved already	5	26%	9	25%	1	25%	**15**	**25%**
Expect to achieve at a future date	3	16%	9	25%	2	50%	**14**	**24%**
May achieve at a future date	3	16%	5	14%	0	0%	**8**	**14%**
Not achieved and don't expect to	6	32%	8	22%	1	25%	**15**	**25%**
Don't Know	0	0%	0	0%	0	0%	**0**	**0%**
Not applicable	2	11%	5	14%	0	0%	**7**	**12%**
Totals	**19**	**101%**	**36**	**100%**	**4**	**100%**	**59**	**100%**

Raised finance	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Achieved already	5	26%	14	39%	1	25%	**20**	**34%**
Expect to achieve at a future date	2	11%	6	17%	2	50%	**10**	**17%**
May achieve at a future date	6	32%	4	11%	0	0%	**10**	**17%**
Not achieved and don't expect to	3	16%	4	11%	1	25%	**8**	**14%**
Don't Know	0	0%	1	3%	0	0%	**1**	**2%**
Not applicable	3	16%	7	19%	0	0%	**10**	**17%**
Totals	**19**	**101%**	**36**	**100%**	**4**	**100%**	**59**	**100%**

How many jobs (Full time equivalent posts) Have you created or safeguarded already?

	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
0	11	58%	15	42%	3	75%	**29**	**49%**
0.5	1	5%	0	0%	0	0%	**1**	**2%**
1	3	16%	10	28%	1	25%	**14**	**24%**
2	2	11%	2	6%	0	0%	**4**	**7%**
3	1	5%	3	8%	0	0%	**4**	**7%**
4	0	0%	0	0%	0	0%	**0**	**0%**
5	0	0%	1	3%	0	0%	**1**	**2%**
6 - 10	0	0%	2	6%	0	0%	**2**	**3%**
10+	0	0%	1	3%	0	0%	**1**	**2%**
Don't know/Unwilling to say	1	5%	2	6%	0	0%	**3**	**5%**
Totals	**19**	**100%**	**36**	**102%**	**4**	**100%**	**59**	**100%**

How many jobs (Full time equivalent posts) Do you expect to create, in the next 12 months or so?

	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
0	7	37%	11	31%	2	50%	**20**	**34%**
0.5	0	0%	0	0%	0	0%	**0**	**0%**
1	9	47%	10	28%	1	25%	**20**	**34%**
2	1	5%	7	19%	1	25%	**9**	**15%**
3	0	0%	2	6%	0	0%	**2**	**3%**
4	0	0%	2	6%	0	0%	**2**	**3%**
5	0	0%	0	0%	0	0%	**0**	**0%**
6 - 10	1	5%	2	6%	0	0%	**3**	**5%**
10+	0	0%	0	0%	0	0%	**0**	**0%**
Don't know/Unwilling to say	1	5%	2	6%	0	0%	**3**	**5%**
Totals	**19**	**99%**	**36**	**102%**	**4**	**100%**	**59**	**100%**

Thinking about any benefits your business has experienced, what would have happened if your business had not sought support?

	Medium and High Intensity							
	BES		BEST		K&M		Total	
	n	%	n	%	n	%	n	%
Benefits would not have occurred at all	1	5%	7	19%	2	50%	**10**	**17%**
Benefits would have occurred but at a later date	6	32%	15	42%	1	25%	**22**	**37%**
Benefits would have occurred but by a smaller amount	2	11%	2	6%	0	0%	**4**	**7%**
Benefits would have occurred but later and by a smaller amou	4	21%	8	22%	1	25%	**13**	**22%**
Benefits would have occurred in exactly same way	4	21%	2	6%	0	0%	**6**	**10%**
Don't Know	1	5%	0	0%	0	0%	**1**	**2%**
Not applicable	1	5%	2	6%	0	0%	**3**	**5%**
Totals	**19**	**100%**	**36**	**101%**	**4**	**100%**	**59**	**100%**

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