

iCEX

SECTOR-BASED PROMOTION PLAN PROGRAM

IMPACT EVALUATION

SECTOR-BASED PROMOTION PLAN PROGRAM

RESPONSIBLE OF THE EVALUATION

**Evaluation Department
Executive Office
ICEX Spain Trade & Investment**

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OBJECTIVE OF THE EVALUATION



Ex post impact evaluation of the ICEX Sector Plans Program to gather evidence on its medium- and long-term effectiveness for participating companies.

WHAT IS THE ACTIVITY BEING EVALUATED?

The ICEX Sector-Based Promotion Plan Program promotes Spanish offerings and brand image abroad for sectors that have well-organized, influential exporters' associations. These plans are proposed by the associations and approved by ICEX. To date, a total of 148 plans has received support. We were able to evaluate 112 plans that were active from 2009 to 2011, which is the time frame of this evaluation.

The plans include 22 different support instruments, grouped into four categories: exhibitions (trade shows), networking, public relations (communication and marketing), and information.

We focused on the ten instruments with the largest number of beneficiaries, which were each evaluated separately.

The beneficiaries are divided into the following categories:

- **Repeat clients:** those who have participated significantly in more than one instrument category.
- **Occasional clients:** those who have participated significantly in only one instrument category.

Only repeat clients were asked about the effects of the collective action of the Sector-Based Promotion Plans.

WHAT IS THE PURPOSE OF ICEX'S SUPPORT?



Immediate objective: (short-term) to generate sales opportunities and facilitate direct contact with international customers.



Mediate objective: (medium-term) to increase sales contracts and improve customer loyalty and (long-term) to enhance the competitiveness of Spanish companies.

EVALUATION QUESTIONS

- What types of companies participate in the Sector-Based Promotion Plans?
- Are there differences in the way associations use resources to organize and implement the Sector-Based Promotion Plans?
- What effect do the collective promotion efforts have?
- What impact does participation in the Sector-Based Promotion Plans have?

EVALUATION FACT SHEET



TARGET POPULATION

Spanish companies with exportable products or services.

UNIVERSE

7.056 unique companies that participated in any activity under the ICEX Sector-Based Promotion Plan Program.

TIME FRAME

2009-2011.

SAMPLE

1,995 unique clients.

SAMPLING METHOD

Simple random sample.

RESPONSE RATE

28.27%

FIELDWORK

June 2012.

IMPACT ESTIMATION TECHNIQUE

Implicit question (counterfeit counterfactual). Two additional questions, called “benefits” (interpretable as value for money) and “additionality”, have been added to the implicit questions in the questionnaire, which make up the value-added section.

A logistic regression model was constructed to check which impact and outcome variables designed to capture effects on the company after receiving support affect the recognition of additionality and benefits of the public intervention.

The analysis was carried out by client type. This analysis consisted of: client impact analysis and analysis of the suitability of the program for surmounting specific barriers faced by the company.

CLASSIFICATION OF SECTOR-BASED PROMOTION PLANS

SEGMENTATION TECHNIQUE: Hierarchical clustering based on the characterization variables of the sector plans between 2003 and 2011. Discriminant analysis reduced these variables to three main canonical linear components: the intensity of resources allocated to the promotion plan, the concentration of resources on individual clients, and the investment and time devoted to each participating company.

There are **11 well-defined plan types:**

TYPE 1	Plans with 100% recurrence, short duration (generally less than two years), and low investment.
TYPE 2	Plans with few unique clients, high recurrence (generally over 50%), and low annual investment (under €1,000,000)..
TYPE 3	Eight-year plans with a limited number of unique clients (10 or fewer), no PIPE companies, and high investment per unique client (over €300,000).
TYPE 4	Plans with a limited number of instruments and low investment per client (under €25,000), with a minimum duration of six years.

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There are **11 well-defined plan types:**

TYPE 5	Plans with a limited number of instruments and low investment per client (under €25,000), with a duration of less than six years.
TYPE 6	Long-term plans (nine years) with high recurrence (over 30%) and large annual investment (over €1,300,000).
TYPE 7	Plans with high company turnover (low recurrence and average duration under three years), annual investment under €200,000, and a reasonable number of countries.
TYPE 8	Plans with low turnover (recurrence over 30%), a limited number of countries, and annual investment under €1,000,000.

CLASSIFICATION OF SECTOR-BASED PROMOTION PLANS

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There are **11 well-defined plan types:**

TYPE 9	Plans with a high number of unique clients (over 300) and large annual investment (over €1,000,000).
TYPE 10	Plans with moderate recurrence (under 40%), a high number of countries (over 50), and a high number of unique clients (between 150 and 400).
TYPE 11	Plans with very large annual investment (€6,000,000). This type only includes the General Plan of Wines, which is part of the Sector-Based Promotion Plan Program because it's managed through the regulatory councils.

CLIENT SEGMENTATION

SEGMENTATION TECHNIQUE: Hierarchical clustering based on the characterization variables included in the survey and variables collected from INFORMA D&B.

There are **10 well-defined client types**.

TYPE 1

Stable or declining companies with more than 20 years of international experience, a turnover below €6 million, diversified in more than ten countries, an export share above 50%, and a commitment to R&D&I, though they are not aware of quality certification. These companies exhibit a higher concentration of consumer-sector businesses than expected.

TYPE 2

Growing companies with a turnover below €2 million, less than six years of international experience, and a willingness to invest in R&D&I, though they are not aware of quality certification. Their export share generally exceeds 30% and is spread across one to ten countries. There is a higher concentration in agri-food than expected. These companies are occasional clients.

TYPE 3

Companies with a turnover below €6 million, international experience, an export share above 20% spread across fewer than ten countries, and a tendency to invest in R&D&I, though they are not aware of quality certification. The majority are consumer and industrial companies. These companies are occasional clients.

CLIENT SEGMENTATION

SEGMENTATION TECHNIQUE: Hierarchical clustering based on the characterization variables included in the survey and variables collected from INFORMA D&B.

There are **10 well-defined client types**.

TYPE 4

Primarily declining companies with a turnover above €2 million, over 11 years of international experience, an export share above 20% spread across more than 11 countries, a willingness to invest in R&D&I, and an awareness of quality certification. There is a higher concentration of industrial companies than expected.

TYPE 5

Growing companies with a turnover below €6 million, more than six years of international experience, an export share above 50% spread across more than ten countries, and an awareness of R&D&I, although only half of them have a certified quality system. There is a higher concentration of industrial companies than expected

TYPE 6

Stable companies with a turnover below €2 million, less than six years of international experience, and an export share below 10% spread across few countries. They are generally aware of R&D&I but not of quality certification. There is a higher concentration of industrial and service companies than expected. These companies are occasional clients.

CLIENT SEGMENTATION

SEGMENTATION TECHNIQUE: Hierarchical clustering based on the characterization variables included in the survey and variables collected from INFORMA D&B.

There are **10 well-defined client types**.

TYPE 7

Declining companies with a turnover below €2 million, less than 11 years of international experience, and an export share below 20% spread across few countries. They aren't aware of quality certification but show some commitment to R&D&I. There is a lower concentration of agri-food companies than expected. These companies are occasional clients.

TYPE 8

Companies with a turnover between €2 million and €6 million, less than ten years of international experience, and an export share below 20% spread across few countries. They are aware of quality certification and R&D&I, and the majority are industrial companies. These companies are occasional clients.

TYPE 9

Growing companies with a turnover above €10 million, more than 20 years of experience, and an export share above 60% spread across more than 20 countries. They are aware of quality certification and R&D&I, and the majority are industrial companies.

TYPE 10

Similar to Type 9, but stable and with lower turnover.

OVERALL EFFECTIVENESS

- The delivery of the Sector-Based Promotion Plan Program is consistent across geographic destinations in achieving its objectives.
- **82% of companies recognize the added value** of participating in the Sector-Based Promotion Plan Program.
- Metrics on the impact of collective action show that it exists and is widely recognized by participating companies. This impact is particularly evident in the improvement of the sector's image and in the bandwagon effect.
- **Companies across the board acknowledge additionality in market entry**, in strengthening and enhancing the sector's image, **in increasing confidence to operate in international markets, and gaining new ideas** for products, services or technologies that define their competitive environment in foreign markets.
- Beyond the overall effectiveness of participating in the plan, we also were able to identify the effectiveness of each type of support for each type of company.

EFFECTIVENESS OF NETWORKING INSTRUMENTS BY COMPANY TYPE

- The evaluation shows that **the only companies that recognize the value of the support are those that request a meeting agenda** in addition to the ICEX-supported activity **and actually use it.**
- **Type 1** companies attribute easier entry into new markets to public support.
- **Type 2** companies attribute greater awareness of the importance of intangibles and improvements in marketing strategy to public support.
- **Type 3** companies attribute improvements in their marketing strategy and the ability to maintain their customer portfolio to public support.
- **Type 4** companies attribute entry into new markets, greater awareness of the importance of intangibles, and a positive effect on turnover to public support.
- **Type 5** companies attribute increased confidence when entering a new market or expanding in an existing one, improvements in marketing strategy, and a positive effect on their income statement to public support.
- **Type 6** companies attribute increased confidence when entering a new market or expanding in an existing one, as well as entry into new markets to public support.

EFFECTIVENESS OF NETWORKING INSTRUMENTS BY COMPANY

- **Type 7** companies attribute new insights gained about their competitive environment in foreign markets, improvements in their products, services, processes or management methods, increased confidence when entering a new market or expanding in an existing one, and a positive effect on turnover to public support.
- **Type 8** companies attribute entry into new markets, greater awareness of the importance of intangibles, and a positive effect on turnover to public support.
- **Type 9** companies attribute greater awareness of the importance of intangibles, increased confidence when entering a new market or expanding in an existing one, and a positive effect on their income statement to public support.
- **Type 10** companies attribute greater awareness of the importance of intangibles, increased confidence when entering a new market or expanding in an existing one, easier entry into new markets, and a positive effect on their income statement to public support.

EFFECTIVENESS OF TRADE SHOW INSTRUMENTS BY COMPANY TYPE

- **Type 1** companies attribute improvements in their products, services, processes or management methods, customer retention, a positive effect on turnover, and easier entry into new markets to public support.
- **Type 2** companies attribute increased confidence when entering a new market or expanding in an existing one, as well as a positive effect on turnover to public support.
- **Type 3** companies attribute a positive effect on turnover and easier entry into new markets to public support.
- **Type 4** companies attribute increased confidence when entering a new market or expanding in an existing one, a positive effect on their income statement and turnover, and the decision to make it easier to increase R&D spending to public support.
- **Type 5** companies attribute a positive effect on their income statement, easier entry into new markets, and greater awareness of the importance of intangibles to public support.
- **Type 6** companies attribute entry into new markets to public support.
- **Type 7** companies attribute entry into new markets and greater awareness of the importance of intangibles to public support.

EFFECTIVENESS OF TRADE SHOW INSTRUMENTS BY COMPANY TYPE

- ↗ **Type 8** companies attribute the ability to maintain their customer portfolio and easier entry into new markets to public support.
- ↗ **Type 9** companies attribute increased confidence when entering a new market or expanding in an existing one, entry into new markets, easier improvements in their products, services, processes or management methods, and a positive effect on their income statement to public support.
- ↗ **Type 10** companies attribute gaining new ideas for products, services or technologies that define their competitive environment in foreign markets, as well as easier improvements to their marketing strategy to public support.

EFFECTIVENESS OF COMMUNICATION AND MARKETING INSTRUMENTS BY COMPANY TYPE

- ↗ **Type 1** companies attribute a positive effect on their income statement and increased confidence in operating in international markets to public support.
- ↗ **Type 2** companies attribute gaining new ideas for products, services or technologies that define their competitive environment in foreign markets, as well as the ability to more easily maintain their customer portfolio to public support.
- ↗ **Type 3** companies attribute entry into new markets and a positive effect on their income statement to public support.
- ↗ **Type 4** companies attribute increased confidence in operating in international markets to public support.
- ↗ **Type 5** companies attribute increased confidence in operating in international markets, a positive effect on their income statement, and the decision to make it easier to increase R&D spending to public support.
- ↗ **Type 6** companies attribute gaining new ideas for products, services or technologies that define their competitive environment in foreign markets to public support.
- ↗ **Type 7** companies attribute improvements in their marketing strategy to public support.

EFFECTIVENESS OF COMMUNICATION AND MARKETING INSTRUMENTS BY COMPANY TYPE

- **Type 8** companies attribute a positive effect on turnover and the ability to more easily maintain their customer portfolio to public support.
- **Type 9** companies attribute improvements in their marketing strategy, increased confidence in operating in international markets, gaining new ideas for products, services or technologies that define their competitive environment in foreign markets more easily to public support.
- **Type 10** companies attribute a positive effect on their income statement and easier improvements in their products, services, processes or management methods to public support.

RECOMMENDATIONS

Implementing a comprehensive CRM system is recommended to characterize and understand Spanish companies, as well as foreign importers, distributors, prescribers, decision-makers and public institutions. This CRM should include an information system of company characteristics with the ability to classify them, thereby improving client knowledge and relationship management. This system would also facilitate data-driven management and more efficient data mining.

Patterns are evident in preferences for public support to help companies overcome barriers to entering foreign markets. Regular clients tend to favour financial support, while occasional clients are more likely to seek credibility reinforcement. This suggests that companies that repeatedly participate in a certain type of support, regardless of the real attributable effects, are motivated by the opportunity to reduce participation fees. Access to clients and access to relevant information consistently appear as linked priorities and represent the main preference group for all company types. These two linked preferences are somewhat opposed to in-person promotional activities. Therefore, **we recommend that the public fees for participation in activities be reconsidered, and that a temporal criterion be introduced.** Under this criterion, the level of subsidy would decrease as participation in the same activity becomes more frequent over time.

RECOMMENDATIONS

The individual usefulness of certain instruments should also be reassessed. In particular, given the large number of beneficiaries and the budget cuts imposed on ICEX in 2012, **an ex-ante needs assessment is recommended for the trade missions instrument to enhance customer value.** The real value of this support appears to largely depend on the inclusion of complementary meeting agendas. Without these agendas, the trade missions instrument essentially serves only as a travel grant that reimburses expenses for trade promotion activities organized by associations in a destination country.

Among the suggestions for improvement, participants in a small group of Sector-Based Promotion Plans pointed to the poor organization of activities by their associations, and participants in another reduced group called for the removal of intermediaries in ICEX support. **We recommend that ICEX reconsider the effectiveness of its collaboration with certain associations.**

COMPLIANCE WITH RECOMMENDATIONS

The recommendations set out in this evaluation have been accepted as necessary and feasible by both the organization and those responsible for providing the various ICEX services. The implementation of these recommendations will enable improvements to be made in the provision of services, bearing in mind that the improvement process is ongoing, thanks to other evaluations that are either already underway or will be launched if necessary.

PROCURING INFORMATION

The fieldwork and descriptive analysis were carried out by means of a below-threshold contract awarded to the company **WEBTOOLS, S.L.**



ICEX