



SMMT – Supply Chain Membership Survey

METHODOLOGY NOTE

ComRes interviewed 112 Supply Chain members of the Society of Motor Manufacturers and Traders (SMMT) online between 6th and 26th May 2016. ComRes is a member of the British Polling Council and abides by its rules.

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SMMT – SUPPLY CHAIN MEMBERSHIP SURVEY 2016

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Q1. Do you think that the overall state of the UK automotive supply chain has improved, stayed the same or worsened over the past 3 years?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
Improved	57 51%	7 58%	13 39%	19 50%	39 47%	18 62%
Stayed the same	36 32%	2 17%	12 36%	14 37%	28 34%	8 28%
Worsened	7 6%	- -	4 12%	1 3%	5 6%	2 7%
Don't know	12 11%	3 25%	4 12%	4 11%	11 13%	1 3%
NETS						
Net: Improved or stayed the same	93 83%	9 75%	25 76%	33 87%	67 81%	26 90%

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Q2. At the current time, how positive or negative do you feel about your business' prospects over the next 3 years?

Base: All respondents

	Total	BUSINESS SIZE				NET: SMEs (0-249)	Large (250+)
		Micro (0-9)	Small (10-49)	Medium (50-249)			
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%	
Very positive (5)	29 26%	4 33%	9 27%	6 16%	19 23%	10 34%	
Fairly positive (4)	58 52%	6 50%	13 39%	24 63%	43 52%	15 52%	
Neutral (3)	21 19%	2 17%	10 30%	5 13%	17 20%	4 14%	
Fairly negative (2)	3 3%	- -	- -	3 8%	3 4%	- -	
Very negative (1)	1 1%	- -	1 3%	- -	1 1%	- -	
Don't know	- -	- -	- -	- -	- -	- -	
NETS							
Net: Positive	87 78%	10 83%	22 67%	30 79%	62 75%	25 86%	
Net: Negative	4 4%	- -	1 3%	3 8%	4 5%	- -	
Mean score	3.99	4.17	3.88	3.87	3.92	4.21	

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Q3. How important or unimportant to your business's future is increasing the volume of business you do with UK-based vehicle manufacturers and major suppliers?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
Very important (4)	68 61%	8 67%	19 58%	24 63%	51 61%	17 59%
Fairly important (3)	36 32%	3 25%	9 27%	13 34%	25 30%	11 38%
Not very important (2)	6 5%	1 8%	4 12%	- -	5 6%	1 3%
Not at all important (1)	2 2%	- -	1 3%	1 3%	2 2%	- -
Don't know	- -	- -	- -	- -	- -	- -
NETS						
Net: Important	104 93%	11 92%	28 85%	37 97%	76 92%	28 97%
Net: Not important	8 7%	1 8%	5 15%	1 3%	7 8%	1 3%
Mean score	3.52	3.58	3.39	3.58	3.51	3.55

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Q4. Does your business plan to invest in itself over the next 3 years?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
Yes	105 94%	12 100%	31 94%	36 95%	79 95%	26 90%
No	2 2%	-	1 3%	-	1 1%	1 3%
Don't know	5 4%	-	1 3%	2 5%	3 4%	2 7%

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Q5. Please give an indication of how much your business intends to invest in itself over the next 3 years.

Base: All respondents who plan to invest in the next 3 years

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	105 100%	12 100%	31 100%	36 100%	79 100%	26 100%
£0 - £200,000	16 15%	3 25%	8 26%	4 11%	15 19%	1 4%
£200,001 - £1,000,000	20 19%	1 8%	8 26%	10 28%	19 24%	1 4%
£1,000,001 - £5,000,000	15 14%	2 17%	3 10%	6 17%	11 14%	4 15%
£5,000,001+	9 9%	- -	- -	- -	- -	9 35%
Don't know/no response	45 43%	6 50%	12 39%	16 44%	34 43%	11 42%
Median	675000	250000	250000	550000	400000	1000000
Minimum	0	50000	10000	50000	10000	0
Maximum	50000000	3000000	5000000	5000000	5000000	50000000
Total	224485000	6625000	15110000	27550000	49285000	175200000

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Q6. Which of the following, if any, does your business plan to do in the next 3 years?

Base: All respondents who plan to invest in the next 3 years

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	105 100%	12 100%	31 100%	36 100%	79 100%	26 100%
Invest in plant, machinery or tooling	83 79%	3 25%	23 74%	33 92%	59 75%	24 92%
Secure new UK-based customers	81 77%	10 83%	24 77%	28 78%	62 78%	19 73%
Invest in skills / apprentices	77 73%	7 58%	20 65%	26 72%	53 67%	24 92%
Invest in new product development	69 66%	6 50%	18 58%	26 72%	50 63%	19 73%
Invest in R&D	58 55%	6 50%	12 39%	23 64%	41 52%	17 65%
Enter new overseas markets	48 46%	6 50%	13 42%	15 42%	34 43%	14 54%
Company buy-outs or mergers	31 30%	4 33%	4 13%	11 31%	19 24%	12 46%
Joint ventures	24 23%	3 25%	7 23%	6 17%	16 20%	8 31%
Other	2 2%	1 8%	- -	1 3%	2 3%	- -
Don't know	- -	- -	- -	- -	- -	- -
NETS						
Net: Investment of any type	104 99%	11 92%	31 100%	36 100%	78 99%	26 100%
Net: Any joint venture or merger	43 41%	5 42%	9 29%	14 39%	28 35%	15 58%

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Q7. Does your business plan to expand its UK-based workforce over the next 3 years?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
Yes	76 68%	10 83%	26 79%	24 63%	60 72%	16 55%
No	15 13%	1 8%	3 9%	4 11%	8 10%	7 24%
Don't know	21 19%	1 8%	4 12%	10 26%	15 18%	6 21%

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Q8. How many UK jobs does your business plan to create over the next 3 years?

Base: All respondents who plan to expand their UK workforce in the next 3 years

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	76 100%	10 100%	26 100%	24 100%	60 100%	16 100%
1-5	23 30%	6 60%	14 54%	3 13%	23 38%	- -
6-10	16 21%	3 30%	6 23%	7 29%	16 27%	- -
11-25	11 14%	1 10%	4 15%	5 21%	10 17%	1 6%
26-50	8 11%	- -	1 4%	3 13%	4 7%	4 25%
51-100	2 3%	- -	- -	- -	- -	2 13%
100+	5 7%	- -	- -	2 8%	2 3%	3 19%
Don't know	11 14%	- -	1 4%	4 17%	5 8%	6 38%
NETS						
Net: 1-50	58 76%	10 100%	25 96%	18 75%	53 88%	5 31%
Net: 50+	7 9%	- -	- -	2 8%	2 3%	5 31%

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Q9. Which of the following, if any, has your business done in the past 12 months?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
Won a bid for a supply contract	76 68%	4 33%	16 48%	30 79%	50 60%	26 90%
Lost a bid for a supply contract	38 34%	1 8%	12 36%	14 37%	27 33%	11 38%
Not applicable - we have not bid for any supply contracts in the past 12 months	24 21%	7 58%	10 30%	6 16%	23 28%	1 3%
Don't know	7 6%	1 8%	4 12%	-	5 6%	2 7%

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Q10. Which of the following obstacles, if any, have prevented your business from successfully securing supply contracts in the past 12 months?

Base: All respondents who have lost a supply contract in the last 12 months

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	38 100%	1 100%	12 100%	14 100%	27 100%	11 100%
We could not compete on cost	30 79%	1 100%	9 75%	12 86%	22 81%	8 73%
Purchasing decisions were not made in the UK	24 63%	- -	7 58%	10 71%	17 63%	7 64%
We could not compete on turnaround time / logistics	3 8%	- -	- -	2 14%	2 7%	1 9%
We did not have the capacity to meet the scale of the supply required	2 5%	- -	- -	1 7%	1 4%	1 9%
Our workforce lacked the relevant skills	2 5%	- -	- -	1 7%	1 4%	1 9%
We could not compete on quality	- -	- -	- -	- -	- -	- -
We could not compete on Health, Safety, Environmental or Regulatory requirements	- -	- -	- -	- -	- -	- -
Other	3 8%	- -	2 17%	- -	2 7%	1 9%
Don't know	- -	- -	- -	- -	- -	- -
None of the above	1 3%	- -	- -	- -	- -	1 9%
NETS						
Net: Could not compete for any reason	31 82%	1 100%	9 75%	13 93%	23 85%	8 73%

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Q11. Which of the following challenges, if any, do you think are likely to impede your company's ability to invest / grow over the next three years?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
Exchange rate fluctuations	69 62%	10 83%	16 48%	24 63%	50 60%	19 66%
Competition from overseas suppliers	65 58%	7 58%	16 48%	20 53%	43 52%	22 76%
Availability of skilled workers / apprentices / graduates	46 41%	4 33%	12 36%	13 34%	29 35%	17 59%
Fluctuations in the price of materials	37 33%	5 42%	4 12%	17 45%	26 31%	11 38%
Lack of visibility among purchasers	35 31%	4 33%	12 36%	14 37%	30 36%	5 17%
Cost of energy	28 25%	1 8%	9 27%	10 26%	20 24%	8 28%
Difficulty securing funding or finance	23 21%	4 33%	10 30%	5 13%	19 23%	4 14%
Business rates	17 15%	3 25%	5 15%	3 8%	11 13%	6 21%
Other	10 9%	1 8%	3 9%	3 8%	7 8%	3 10%
Don't know	1 1%	- -	1 3%	- -	1 1%	- -
None of the above	6 5%	- -	2 6%	4 11%	6 7%	- -

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Q12. What proportion, if any, of the products that you manufacture in the UK do you currently export?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
None - 0% (0.0)	15 13%	5 42%	6 18%	4 11%	15 18%	- -
1-20% (10.5)	43 38%	2 17%	15 45%	18 47%	35 42%	8 28%
21-40% (30.5)	18 16%	4 33%	5 15%	4 11%	13 16%	5 17%
41-60% (50.5)	9 8%	- -	2 6%	3 8%	5 6%	4 14%
61-80% (70.5)	13 12%	- -	4 12%	2 5%	6 7%	7 24%
81-99% (90.0)	8 7%	1 8%	- -	5 13%	6 7%	2 7%
All of it - 100% (100.0)	1 1%	- -	1 3%	- -	1 1%	- -
Don't know	5 4%	- -	- -	2 5%	2 2%	3 10%
NETS						
Net: 40% or less	76 68%	11 92%	26 79%	26 68%	63 76%	13 45%
Median	11	11	11	11	11	41
Mean score	29.83	19.42	24.03	29.26	25.67	42.77

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Q13a. To which of the following export markets, if any, do you currently export?

Base: All respondents who export

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	92 100%	7 100%	27 100%	32 100%	66 100%	26 100%
Western Europe	81 88%	7 100%	24 89%	29 91%	60 91%	21 81%
North America	50 54%	3 43%	15 56%	17 53%	35 53%	15 58%
Eastern Europe	49 53%	4 57%	14 52%	17 53%	35 53%	14 54%
China	24 26%	2 29%	4 15%	11 34%	17 26%	7 27%
India	19 21%	1 14%	7 26%	6 19%	14 21%	5 19%
South America	17 18%	1 14%	7 26%	4 13%	12 18%	5 19%
Oceania (including Australia and New Zealand)	17 18%	1 14%	7 26%	6 19%	14 21%	3 12%
Middle East	14 15%	- -	7 26%	4 13%	11 17%	3 12%
Japan	14 15%	1 14%	4 15%	5 16%	10 15%	4 15%
Russia	13 14%	- -	3 11%	2 6%	5 8%	8 31%
South East Asia	12 13%	1 14%	6 22%	4 13%	11 17%	1 4%
Africa	11 12%	1 14%	4 15%	3 9%	8 12%	3 12%
Other	4 4%	- -	- -	1 3%	1 2%	3 12%
Don't know	1 1%	- -	- -	- -	- -	1 4%
NETS						
Net: Europe (incl. Russia)	85 92%	7 100%	25 93%	31 97%	63 95%	22 85%
Net: Asia (incl. Far East)	36 39%	3 43%	11 41%	12 38%	26 39%	10 38%

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Q13b. To which of the following export markets, if any, do you currently export?

Base: All respondents who export

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	92 100%	7 100%	27 100%	32 100%	66 100%	26 100%
North America	50 54%	3 43%	15 56%	17 53%	35 53%	15 58%
South America	17 18%	1 14%	7 26%	4 13%	12 18%	5 19%
Africa	11 12%	1 14%	4 15%	3 9%	8 12%	3 12%
Western Europe	81 88%	7 100%	24 89%	29 91%	60 91%	21 81%
Eastern Europe	49 53%	4 57%	14 52%	17 53%	35 53%	14 54%
Russia	13 14%	- -	3 11%	2 6%	5 8%	8 31%
Middle East	14 15%	- -	7 26%	4 13%	11 17%	3 12%
China	24 26%	2 29%	4 15%	11 34%	17 26%	7 27%
India	19 21%	1 14%	7 26%	6 19%	14 21%	5 19%
Japan	14 15%	1 14%	4 15%	5 16%	10 15%	4 15%
South East Asia	12 13%	1 14%	6 22%	4 13%	11 17%	1 4%
Oceania (including Australia and New Zealand)	17 18%	1 14%	7 26%	6 19%	14 21%	3 12%
Other	4 4%	- -	- -	1 3%	1 2%	3 12%
Don't know	1 1%	- -	- -	- -	- -	1 4%
NETS						
Net: Europe (incl. Russia)	85 92%	7 100%	25 93%	31 97%	63 95%	22 85%
Net: Asia (incl. Far East)	36 39%	3 43%	11 41%	12 38%	26 39%	10 38%

SMMT – SUPPLY CHAIN MEMBERSHIP SURVEY 2016

Q14a. In which, if any, of the following export markets are you looking to identify new export opportunities over the next 3 years?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
Western Europe	49 44%	4 33%	18 55%	13 34%	35 42%	14 48%
Eastern Europe	33 29%	1 8%	11 33%	11 29%	23 28%	10 34%
North America	30 27%	4 33%	10 30%	10 26%	24 29%	6 21%
South America	22 20%	1 8%	6 18%	8 21%	15 18%	7 24%
China	21 19%	4 33%	7 21%	7 18%	18 22%	3 10%
Russia	16 14%	1 8%	4 12%	5 13%	10 12%	6 21%
Middle East	16 14%	2 17%	5 15%	7 18%	14 17%	2 7%
India	16 14%	2 17%	6 18%	4 11%	12 14%	4 14%
Oceania (including Australia and New Zealand)	12 11%	1 8%	7 21%	3 8%	11 13%	1 3%
Japan	11 10%	3 25%	3 9%	3 8%	9 11%	2 7%
South East Asia	10 9%	1 8%	4 12%	4 11%	9 11%	1 3%
Africa	8 7%	- -	3 9%	2 5%	5 6%	3 10%
Other	1 1%	- -	- -	- -	- -	1 3%
Don't know	19 17%	1 8%	6 18%	6 16%	13 16%	6 21%
We are not seeking to identify new export markets	24 21%	4 33%	7 21%	10 26%	21 25%	3 10%
NETS						
Net: Europe (incl. Russia)	57 51%	5 42%	19 58%	16 42%	40 48%	17 59%

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Q14a. In which, if any, of the following export markets are you looking to identify new export opportunities over the next 3 years?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
Net: Asia (incl. Far East)	31 28%	4 33%	10 30%	11 29%	25 30%	6 21%

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Q14b. In which, if any, of the following export markets are you looking to identify new export opportunities over the next 3 years?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
North America	30 27%	4 33%	10 30%	10 26%	24 29%	6 21%
South America	22 20%	1 8%	6 18%	8 21%	15 18%	7 24%
Africa	8 7%	- -	3 9%	2 5%	5 6%	3 10%
Western Europe	49 44%	4 33%	18 55%	13 34%	35 42%	14 48%
Eastern Europe	33 29%	1 8%	11 33%	11 29%	23 28%	10 34%
Russia	16 14%	1 8%	4 12%	5 13%	10 12%	6 21%
Middle East	16 14%	2 17%	5 15%	7 18%	14 17%	2 7%
China	21 19%	4 33%	7 21%	7 18%	18 22%	3 10%
India	16 14%	2 17%	6 18%	4 11%	12 14%	4 14%
Japan	11 10%	3 25%	3 9%	3 8%	9 11%	2 7%
South East Asia	10 9%	1 8%	4 12%	4 11%	9 11%	1 3%
Oceania (including Australia and New Zealand)	12 11%	1 8%	7 21%	3 8%	11 13%	1 3%
Other	1 1%	- -	- -	- -	- -	1 3%
Don't know	19 17%	1 8%	6 18%	6 16%	13 16%	6 21%
We are not seeking to identify new export markets	24 21%	4 33%	7 21%	10 26%	21 25%	3 10%
NETS						
Net: Europe (incl. Russia)	57 51%	5 42%	19 58%	16 42%	40 48%	17 59%

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Q14b. In which, if any, of the following export markets are you looking to identify new export opportunities over the next 3 years?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
Net: Asia (incl. Far East)	31 28%	4 33%	10 30%	11 29%	25 30%	6 21%

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Q15. Based on your current export plans, what proportion of the products that you manufacture in the UK do you plan to export in the next 3 years?

Base: All respondents who are looking to identify new export markets in the next 3 years

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	88 100%	8 100%	26 100%	28 100%	62 100%	26 100%
None - 0% (0.0)	2 2%	1 13%	1 4%	- -	2 3%	- -
1-20% (10.5)	25 28%	1 13%	9 35%	11 39%	21 34%	4 15%
21-40% (30.5)	18 20%	2 25%	6 23%	3 11%	11 18%	7 27%
41-60% (50.5)	17 19%	2 25%	5 19%	5 18%	12 19%	5 19%
61-80% (70.5)	8 9%	- -	3 12%	1 4%	4 6%	4 15%
81-99% (90.0)	7 8%	1 13%	- -	4 14%	5 8%	2 8%
All of it - 100% (100.0)	1 1%	- -	1 4%	- -	1 2%	- -
Don't know	10 11%	1 13%	1 4%	4 14%	6 10%	4 15%
Median	31	31	31	31	31	41
Mean score	38.00	37.50	33.66	37.08	35.61	44.09

SMMT – SUPPLY CHAIN MEMBERSHIP SURVEY 2016

Q16. How many people are directly employed by your business in all UK locations?

Base: All respondents

	Total	BUSINESS SIZE				
		Micro (0-9)	Small (10-49)	Medium (50-249)	NET: SMEs (0-249)	Large (250+)
Total	112 100%	12 100%	33 100%	38 100%	83 100%	29 100%
0-9	12 11%	12 100%	-	-	12 14%	-
10-49	33 29%	-	33 100%	-	33 40%	-
50-249	38 34%	-	-	38 100%	38 46%	-
250+	29 26%	-	-	-	-	29 100%
NETS						
Net: SMEs	83 74%	12 100%	33 100%	38 100%	83 100%	-
Net: Large	29 26%	-	-	-	-	29 100%