



International  
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# ITC Market Analysis Tools (MAT) Survey results

Geneva, September 2010



# Objective of the ITC Market Analysis Tools survey

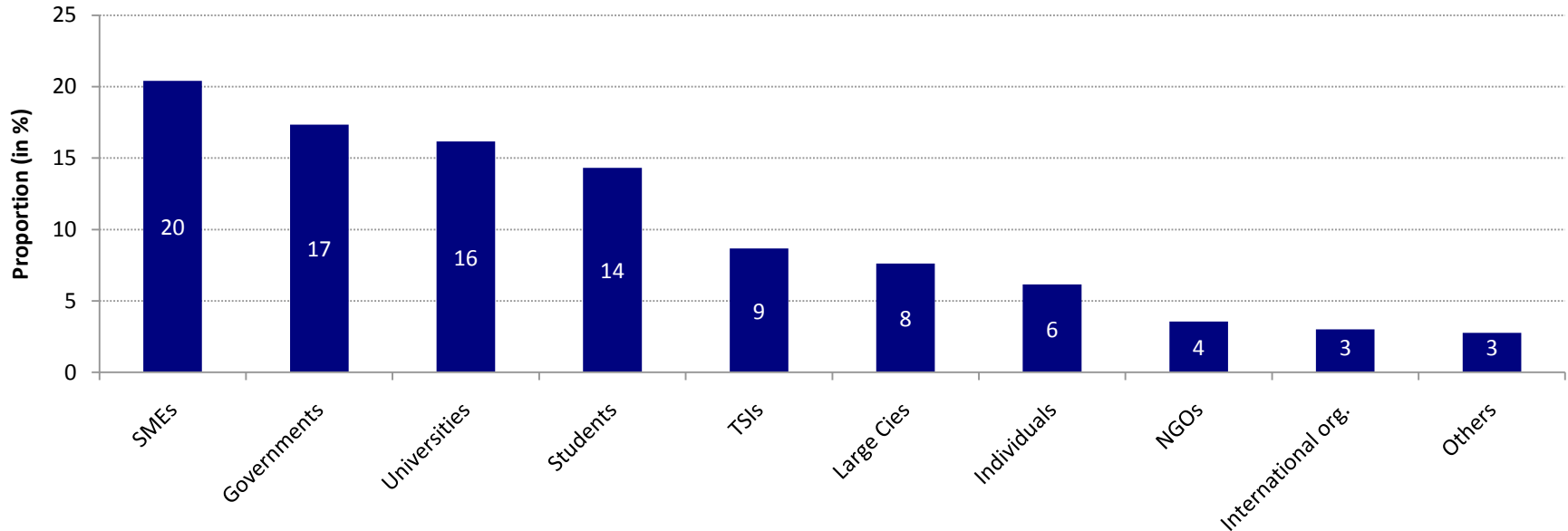
- To monitor relevance, utilisation and performance of market analysis tools: Trade Map, Market Access Map, Investment Map and Product Map
- To provide insights on the impact of ITC market analysis tools
- To obtain feedback for future improvements of the tools

# The survey in figures

Questionnaires sent to users who have **visited** one or more tools at least **twice**.

- **60 414** emails sent (in 3 languages)
  - 1 reminder
  - + 1 popup upon logging into a tool
- The survey was available online for 3 weeks between June 4<sup>th</sup> and June 27<sup>th</sup>. It consisted of a total of 17 questions
- 5 144 answers (i.e. answer rate = 8.5%)
- **4 558** usable answers (i.e. answer rate = 7.5%)

# Users activities



MAT users are mainly:

- Universities and students (30%)
- Enterprises (28%)
- Governments (17%)
- Trade Support Institutions (TSI) (9%)

Significant but **weak** link between the activity and the location:

- Latin America:
  - universities and students (40%)
  - governments (13%)
- Africa:
  - governments (27%)
  - Trade Support Institutions (TSI) (19%)

# Rating the influence of MAT\* ...

... “on the service you deliver”

\* question not asked to enterprises

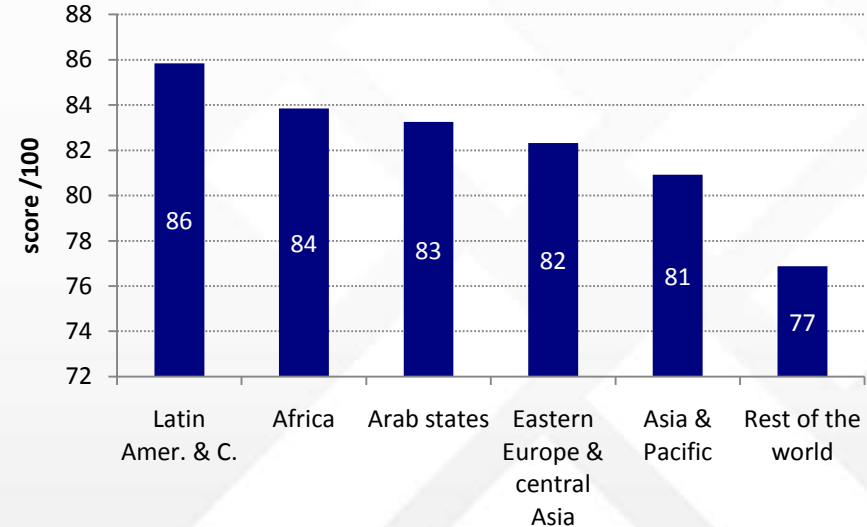


Results:

Average score = **84 / 100**

Answers vary depending on the location:

*Market analysis tools have more influence in Latin America and the Caribbean than in Asia and Eastern Europe.*



# Enterprises rating the influence of MAT\*...

... “on your import or export activity”

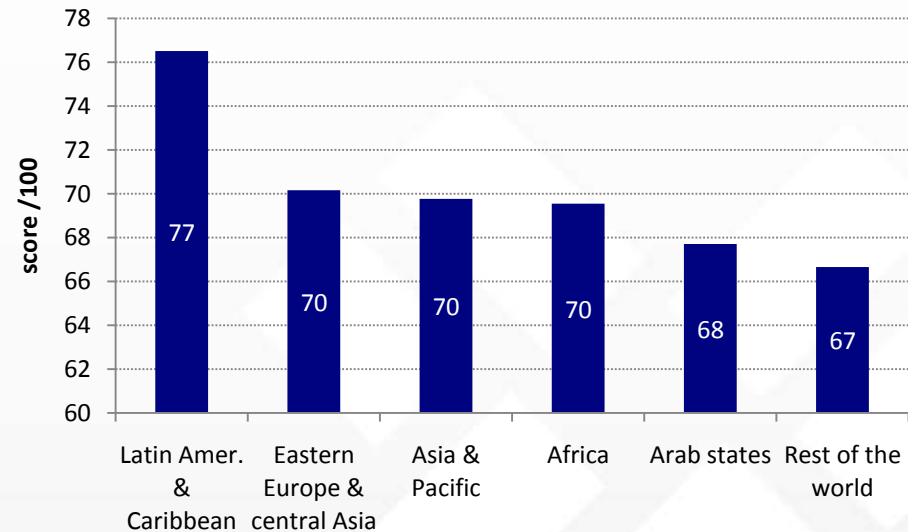
\* Question asked to enterprises only

Average score = **73 / 100**

Answers vary depending on the location:

*Market analysis tools have from far more influence in Latin America and the Caribbean.*

The **size** of the enterprise is irrelevant.



# Enterprises trading activities

- 73% of enterprises declare exporting/importing either goods or services, of which:
  - products and services: 11%
  - products but not services: 9%
  - services but not products: 5%
  - did not answer to “services”: 40%
  - did not answer to “products”: 8%
- 10% declare not trading internationally
- remaining 17%: no answer or “don’t know”

# Tools and companies' turnover

**“What is the size (in US\$) of your import/export turnover for which the ITC market analysis tools have helped you to make your decision?”**

Question asked to companies who declared:

- ✓ **exporting** and/or **importing**,
- ✓ found **positive** or **very positive influence** of the tools on their import/export activity.

- 1411 enterprises in the sample
- 676 were asked the question
- 318 answers
- 299 declared a positive turnover

for a total of **2.7 billion US\$** overall (excluding an outlier of 1 billion US\$).

# Tools and companies' turnover

- 299 enterprises declared a positive turnover
  - Average = 12.4 million US\$ (standard deviation > 69 million US\$)
  - Median = 200 000 US\$
  - 1 outlier: 1 billion US\$ (removed from the analysis)

Without the outlier and assuming 0 US\$ for the 1112\* enterprises that have not declared a positive turnover:

Average = 2 million US\$ (over the 1411 enterprises)

\* Including the enterprises for which the question has not been asked

The **larger** the company the **bigger** the turnover:  
On average:

Large company = **3** x SMEs

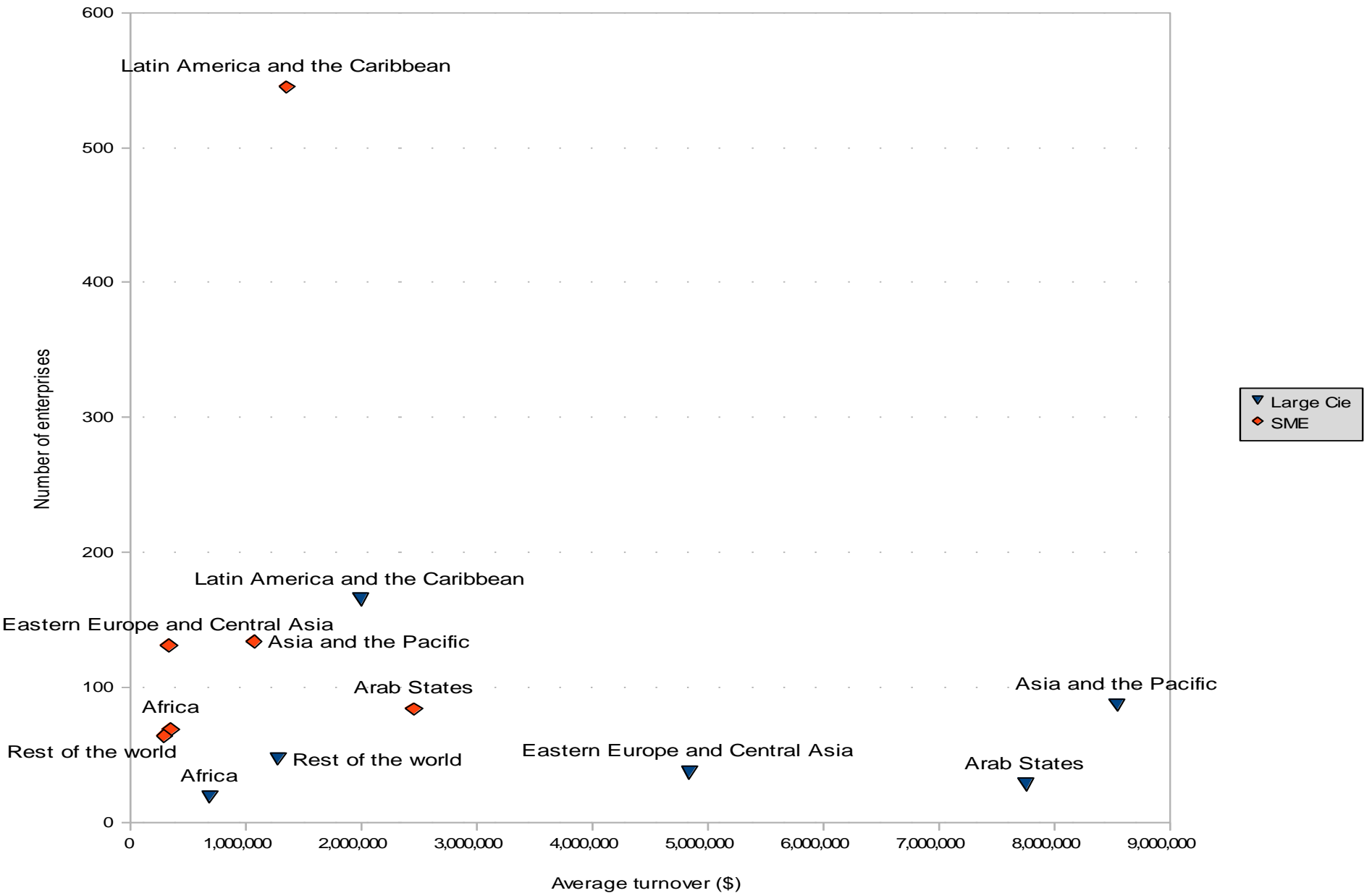
Generalizing to the MAT user database:

*Total turnover around **38 billion US\$***

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# Average turnover and number of enterprises in the sample

by region and size of company



# Impact of ITC market analysis tools

Some examples out of a sample of over 2000 answers

## Enterprises:

- Success export to Bahamas after company thought it would be impossible to export due to import duties. ITC helped determine that which countries were currently exporting to Bahamas, and that they were subject to the same import duties. The result was a successful attempt to export to the Bahamas.
- Efectuamos un estudio del mercado ruso para la exportación de café Cubita tostado en grano y molido donde a partir de las herramientas que ustedes nos proporcionan nos permitieron conocer los niveles de crecimiento de las importaciones de Café por Rusia, sus principales suministradores, las tendencias de crecimiento, los niveles de aranceles etc, dicho estudio culminó con la materialización de una transacción en el mes de Febrero por valor de 500'000 USD
- ITC data revealed the importance of India's imports for our Polymer which we did not expect. This set us to work on the market.

## Governments:

- I am a co-author of Syrian Agricultural Trade Report, which is an annual report. I study the markets of 7 main agricultural commodities. Without the crucial assistance of ITC market analysis, I wouldn't be able to study these markets.
- We teach a course on trade diplomacy to members of the Mexican foreign service, and other Mexican public officials around the world. ITC market tools offer the necessary data to the planning and decision-making process of our trade and financial promotion.



# ...Impact of ITC market analysis tools (continued)

## Governments:

- In negotiation of Bilateral trade agreement, we participated in the discussion for identifying the new 18 products to enter into the Bangladesh market. We study the products using ITC market analysis online tools to ascertain the trade advantage for both countries.

## Trade support institutions:

- We are an export promotion organization- the market analysis tools provided by ITC are absolutely necessary for informed decisions on strategies and modalities we adopt for export promotions programs

- L'outil d'analyse des marchés du CCI est devenu un outil incontournable pour notre service. Comme impact, nous pouvons citer la possibilité pour mon service d'identifier les marchés d'exportation de tel ou tel produit. La rapidité avec laquelle nous traitons les demandes d'informations fait de notre service, une IAC très sollicité dans ce sens.

- In looking at Mexico as an export outlet for livestock, and lobster, we needed the import duty and any other taxes that are applied on these products. ITC tools was useful as it allowed us to make a decision of whether it was useful to pursue the market.

## Universities:

- I teach bachelor students (Business Administration) how to start searching international markets, how to build international strategies, etc. All your tools are very useful for these purposes.

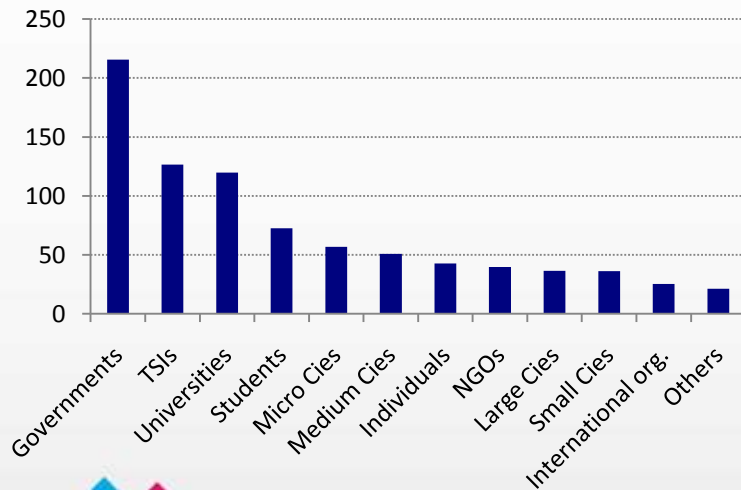
- I work at an exporter company of fruit juices and concentrates as well as frozen fruit. Additionally I m a teacher at the University. In both cases ITC market analysis tools have impacted positively my work. At the export company we build our strategy considering information provided by Trade Map, Product Map and the other tools. At the university I teach to my student how to select international markets, evidently part of the course is strongly based on your tools.



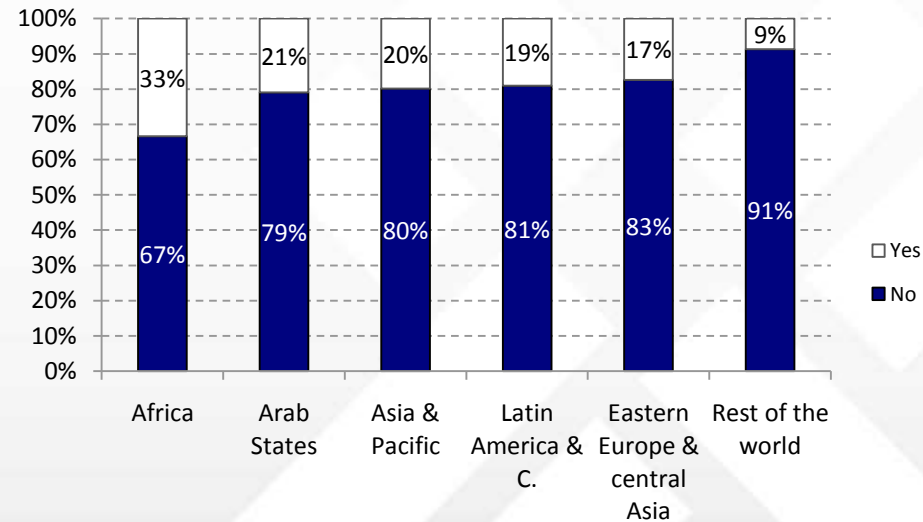
# ITC trainings reach a small number of people

- Less than 20% of our users have been trained.
- Trainees firstly come from governments.
- The strongest effort is made with TSIs, 32% of which are trained.
- Accent is clearly made on the training in Africa

**Number of trained people by activity**

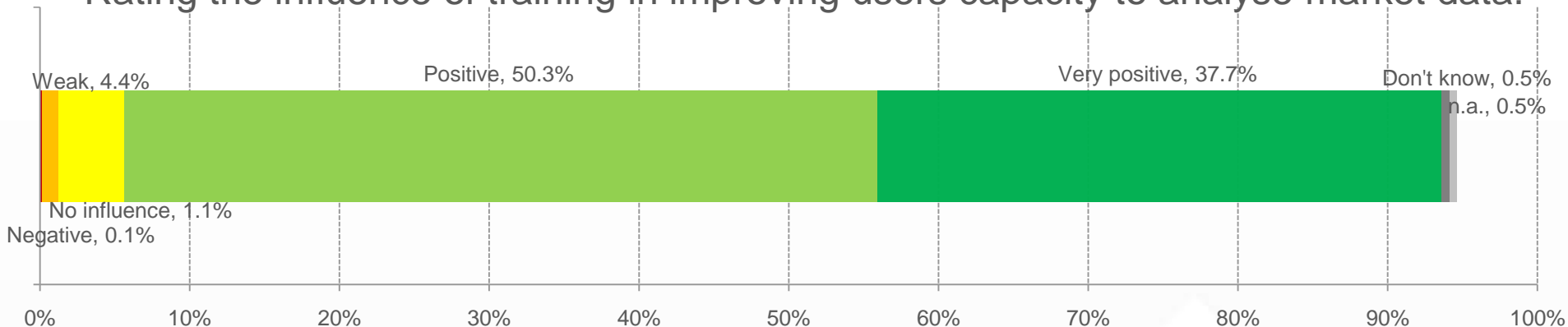


**Participation to a training by region**



# Trainings have impact

Rating the influence of training in improving users capacity to analyse market data:



“n.a.” correspond to the answer: “I do not analyse market data”; blank space correspond to no-answer.

Statistical analysis shows:

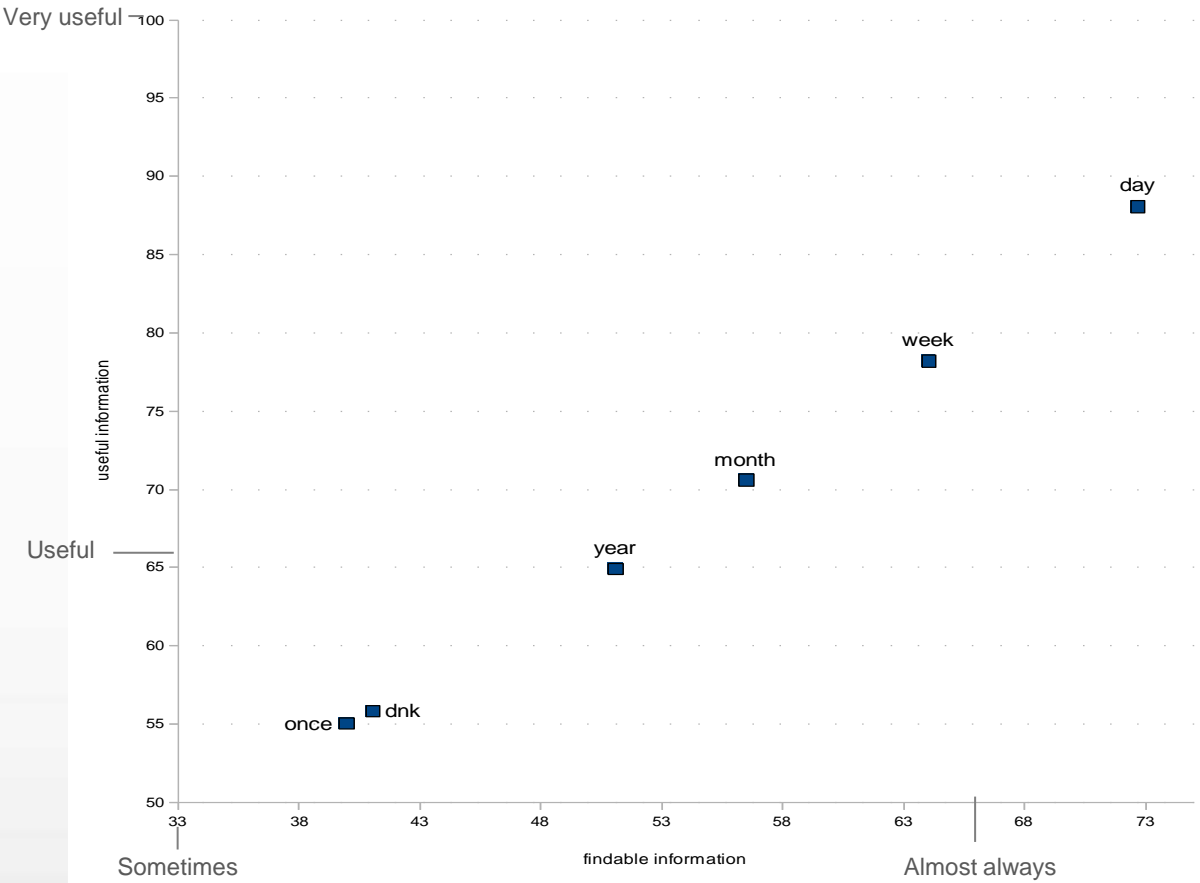
Participating in a training has a **significant** influence (+2 points on average over 100) on the following ratings:

- finding the information,
- find it useful.

# Visiting is finding ... useful information

The example of Investment Map:

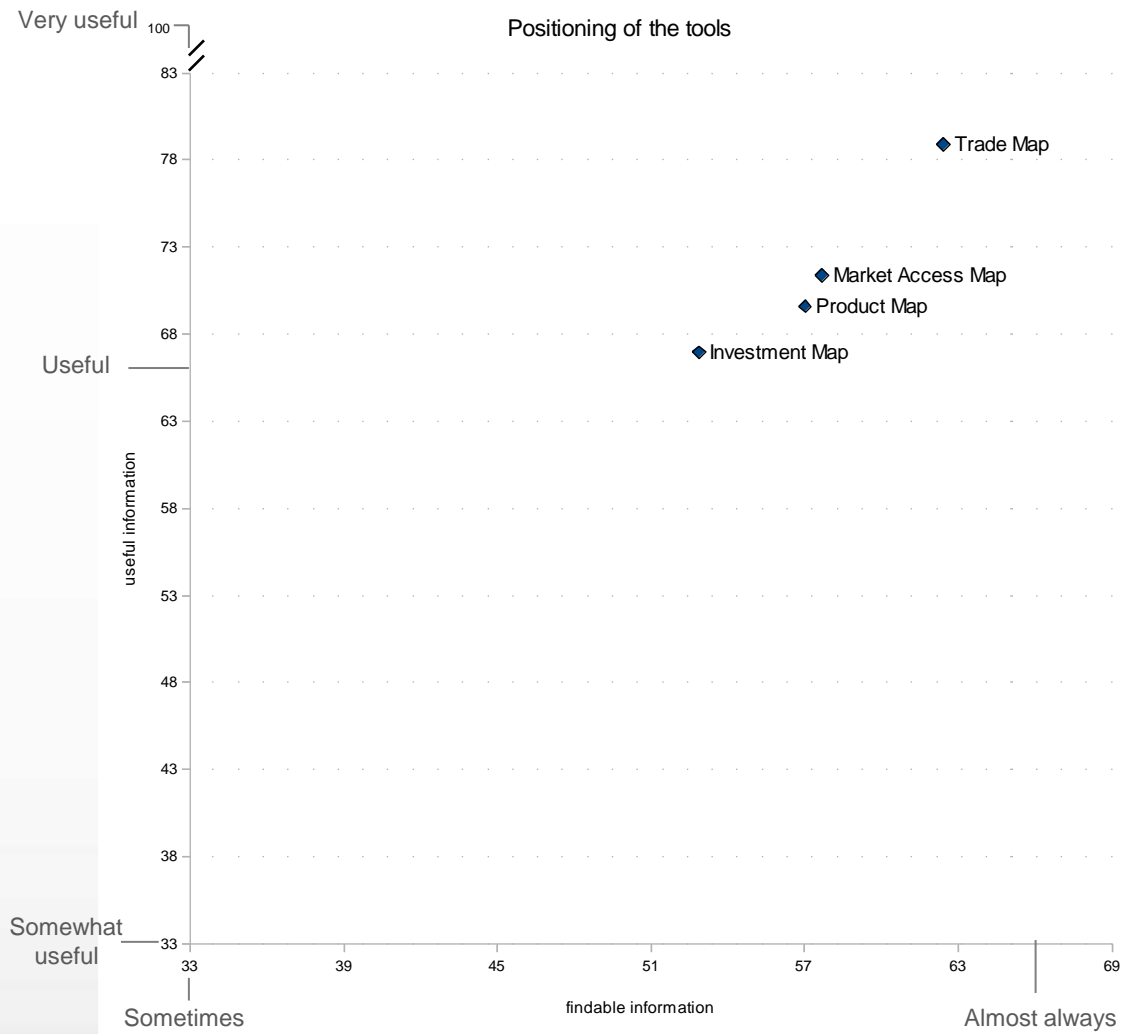
Investment Map



The more often you visit,  
the more you find the  
information,  
the more useful it is.

Similar results for other tools.

# Found information is useful information

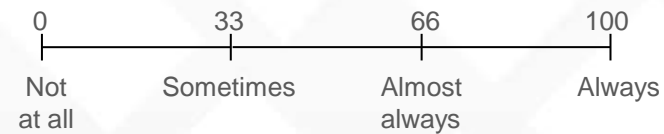


All the tools are performing well: the marks are all above 50 points.

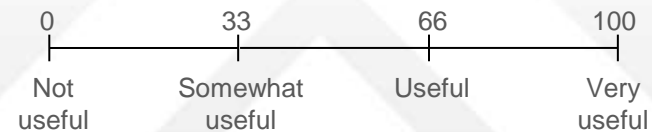
Trade Map is the best performing tool, especially in terms of usefulness.

scales used for the rating:

“do you find the information you are looking for?”

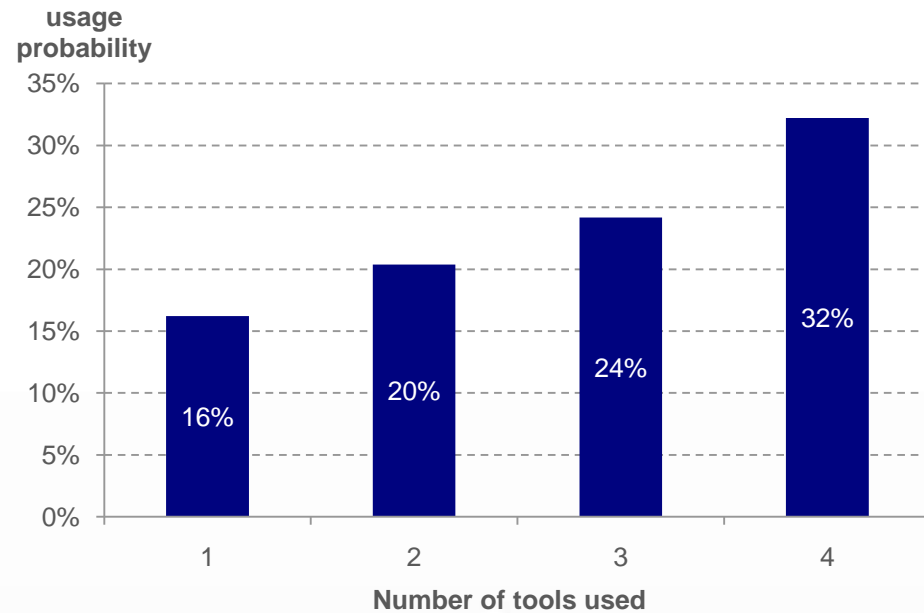
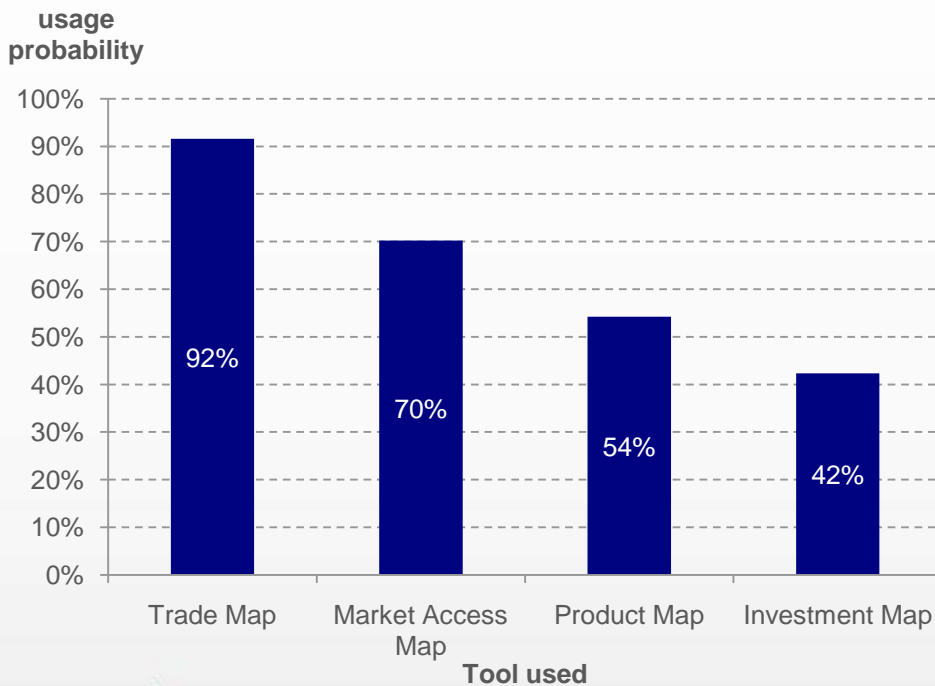


“How useful do you find [the] information?”



# The basket of a user

People tend to use several tools.



e.g. 20% of the users use only 2 tools.

The most frequent combinations are:

1. All tools (32%)
2. All tools but InvMap (15%)
3. Trade Map only (15%)
4. Trade Map + MAcMap (14%)

# “I want more!”

To the question “Which additional features would you like to see included in...?”, the following points came out:

## Trade Map:

- data update
- new indicators
- information on enterprises

## Market Access Map:

- qualitative data
- already available data (e.g. ad-valorem equivalents)
- data update
- improved navigation

## Product Map:

- data coverage
- data update

# Additional comments regarding MAT

<b>Main comments</b>
Thank you, tools are helpful
Keep access free for developing countries
More training activities on the tools
More update
We are not well informed. Tools are not widely disseminated