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The Canadian
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Comprehensive Client Survey

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EXECUTIVE SUMMARY

The Canadian Trade Commissioner Service (TCS) is a component of Foreign Affairs, Trade and Development Canada (DFATD)[1] and has a 14-year history of consulting with clients regarding their experiences. In 2013, results of the Comprehensive Client Survey of the TCS provide necessary information about service achievements, client satisfaction and needs. This will support annual departmental performance reporting on the results of its programs, as well as Treasury Board requirements to obtain client feedback regarding program/service results. Managers will use performance information gathered through this survey to identify areas where further research will be required to understand specific client needs and inform priorities and goals for service improvement. Finally, the 2013 survey presents the opportunity for the department to compare TCS performance to other federal and provincial international business promotion organizations and determine if changes in approaches and practices including the Global Commerce Strategy, sector practices and the Integrative Trade Model, have had a positive impact on clients.

This survey supplements information that is gathered through the TCS Continuous Online Client Survey, which is administered to all clients 60 days after a specific service is closed in order to measure the quality elements of that particular service in light of its short-term commercial impact. The TCS Comprehensive Client Survey differs in that it focuses on the impressions of clients from TCS services delivered during a longer 18-month period and captures other aspects of service and longer-term results obtained such as those related to the conclusion of commercial agreements, and the contribution made by the TCS. In addition, the Comprehensive Client Survey is forward-focused as it inquires about the kinds of markets for which clients are likely to require TCS services in the future.

The Comprehensive survey of 1,222 clients was conducted in April and May 2013, based on invitations successfully sent by email to the universe of 17,255 organizations receiving TCS assistance during the period of July 1, 2011 to December 31, 2012. The response rate to the survey was 7 per cent. Characteristics of the final sample of 1,222 mirror the population with regard to location, sector and services received. However, as in previous surveys, the population surveyed is not a representative sample of the entire target group of TCS clients; therefore, the findings from this survey cannot be extrapolated to the entire client population. The report provides comparisons to the 2009 client survey results, where applicable.

This report will be used to identify specific areas of service delivery where further research can be conducted to assess the effectiveness of the TCS and its impact on clients. The total cost of this research was $34,973.95.

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1 The name of the department was changed to Foreign Affairs, Trade and Development Canada (DFATD) from Foreign Affairs and International Trade Canada (DFAIT) on June 26, 2013.

TCS client profile

TCS clients generally have their headquarters, manufacturing, and/or R&D facilities in Ontario, Quebec, or British Columbia (seven in ten). The vast majority of clients are headquartered in Canada (almost nine in ten). More than six in ten clients (61 per cent) are small businesses (fewer than 100 employees), 17 per cent are medium-sized organizations (100 to 499 employees), and 18 per cent are large organizations (500 or more employees). Size of worldwide revenues vary a great deal between clients, from 12 per cent who record less than $250,000 to 23 per cent who record more than $25 million in revenues.

Most clients (more than eight in ten) were already doing business internationally when they accessed the TCS, including 36 per cent who at the time were interested in expanding to new countries. The primary reasons for interest in conducting international business are exporting goods (57 per cent) and exporting services (31 per cent).

Clients were asked to choose their top three most important markets. About half of TCS clients expect that their organization's top region in terms of growth, obstacles or opportunities over the next three years will be the U.S.A. (51 per cent), followed closely by South Asia/Southeast Asia (45 per cent) and the European Union's EU27 countries (43 per cent).

Service profile

Most respondents are private sector businesses based in Canada that accessed TCS services from abroad or within Canada (75 per cent). One in six (16 per cent) are public or not for profit sector partners such as provincial governments, schools, or associations, and one in ten (nine per cent) are Canadian business subsidiaries based in another country known as Canadian Offices Abroad (COAs).

The majority of clients (77 per cent) accessed TCS services under the trade promotion business line. Services in other TCS business lines were accessed by fewer than six per cent each.[2] Almost all TCS clients have previously received services through an embassy, high commission, consulate or trade office located outside of Canada (91 per cent). The services that clients most often say they have received from TCS are assistance with finding contacts (69 per cent) and preparation for international markets (61 per cent). When asked what service they most recently received in the last 18 months, obtaining qualified contacts (44 per cent) and services to prepare them for international markets (25 per cent) are most often cited.

[2] The other TCS business lines are: Attracting Foreign Direct Investment; Innovation, Science and Technology; Trade Policy / Market Access; and Canadian Direct Investment Abroad.

Satisfaction with last service received

Strong majorities of clients were satisfied with various aspects of the last service that they received, agreeing that staff understood enough about the dynamics of the specific business or sector involved to add value to their business development effort (81 per cent, up from 74 per cent in 2009), and the amount of time they waited to obtain the service they needed was reasonable (77 per cent, on par with 78 per cent in 2009). Satisfaction is high regardless of the type of service received.

Satisfaction among clients who received specific services is also generally higher than in 2009:

- More than eight in ten respondents who received services to assess their potential in target markets felt that the market intelligence/information they received was useful (85 per cent, up 14 points from 2009). Nearly eight in ten of these same respondents say that the intelligence provided to them identified both opportunities and potential difficulties (78 per cent, up 15 points from 2009).
- Eight in ten respondents who received services to assist them with finding qualified contacts in their target market felt that they were provided with the right ones with whom to do business (79 per cent, up seven points from 2009).
- More than eight in ten respondents who received services to help resolve problems related to business challenges found this advice to be useful (83 per cent agreeing, consistent with results from 2009, 81 per cent). Three in four agreed that in cases where staff could not help them correctly, they received a referral to the right contacts (75 per cent, up six points from 2009).
- Additionally, more than eight in ten who received services to prepare them for international markets felt that the information they received was helpful for them to understand overall market conditions (85 per cent, not asked in 2009).

Foreign Direct Investment client satisfaction

Among Foreign Direct Investment (FDI) clients (n=34), satisfaction is particularly strong on two measures: with the information and documentation they received (80 per cent) and the referrals provided (75 per cent). Two in three were satisfied with the level of site visit support (65 per cent), and just over half felt that staff were knowledgeable and competent about investment opportunities in Canada (55 per cent).

Client needs

The top areas where clients say they require assistance are obtaining qualified contacts (82 per cent), getting information on local organizations/companies (74 per cent), and market intelligence (69 per cent). These top needs are consistent with those identified in 2009. There is an increased need for referral of technology partnership opportunities or foreign research/development partnership (38 per cent, up nine points from 2009). Two other important areas of needs identified by just under half of clients are: support for protecting their intellectual property rights, procurement, and regulatory matters (46 per cent); and understanding responsible business practices (45 per cent).

Obstacles

The two greatest obstacles facing clients are the uncertainty of regulatory requirements in other countries (55 per cent), and not having contacts in their desired markets (53 per cent). Relatively more minor challenges are labour/skills availability (although reported to be a large obstacle to 27 per cent), Canadian export taxes or permits (21 per cent), and discriminatory or arbitrary treatment toward Canadian investors or their investments (15 per cent).

Impact of TCS assistance

Majorities of TCS clients report positive impacts from receiving TCS assistance including gaining access to intelligence that would otherwise have been difficult to obtain (63 per cent), gaining access to customers/partners that would have otherwise been difficult to obtain (60 per cent), improving their profile and credibility in foreign markets (59 per cent), improving their knowledge of the competitive environment in target markets (55 per cent), obtaining and assessing market information to decide on whether to pursue an opportunity (54 per cent), and gaining confidence to explore or expand in a foreign market (54 per cent). These frequencies are roughly the same as reported in 2009. Other impacts are reported by fewer than half of clients and in frequencies similar to 2009. Fewer clients now report the avoidance of mistakes and delays (36 per cent, down eight points from 2009).

Results of TCS assistance

Since July 1, 2011, half of clients have pursued a commercial agreement (51 per cent, in line with the 55 per cent recorded in 2009). About half of these clients (49 per cent or 25 per cent overall) concluded this commercial agreement, consistent with the proportion who did so in 2009 (47 per cent). Just over half of clients who concluded a commercial agreement also recorded financial results (55 per cent or 16 per cent overall), which is in line with the 60 per cent recorded in 2009.

Among clients indicating financial results, the main type of results are in areas of exporting goods (65 per cent) and exporting services (44 per cent), consistent with what clients say are their top reasons for having interest in international markets. The magnitude of these financial results ranges from under $25,000 (11 per cent) to more than $50 million (six per cent).

Nearly two in three TCS clients who achieved financial results in the form of export of either goods or services (n=166) say the TCS had a high (31 per cent) or moderate (33 per cent) contribution to this result. These results are largely in line with 2009 results. Only one-quarter of these clients indicate they would have achieved this result regardless of the assistance of the TCS (23 per cent); two in three, however, attribute this outcome at least partially to the contribution of the TCS, similar to the results from 2009.

Six out of ten clients that recorded a financial result say this result had no impact on the size of the workforce in Canada (62 per cent). More than one in three observed a positive change in the workforce (36 per cent), reporting an average increase of 15 per cent (the average driven up by larger increases among the smallest organizations).

Transfer of new technology

For TCS clients who reported that TCS assistance led to the conclusion of new sales and partnership agreement with overseas partners, one-quarter say that these new partnerships led to transfer of new technology (24 per cent). In the majority of cases the technology flowed from Canada to the foreign partner (80 per cent). In one in five cases the technology flowed from the foreign partner to Canada (20 per cent). Three in ten say that joint research and development was pursued (29 per cent).

Roughly one in three to just under four in ten TCS clients said that they introduced or improved goods, services, or manufacturing/production processes on either a domestic or international scale, or both.

For the most part, the impact of the TCS on the transfer of technology was low (57 per cent) to moderate (23 per cent). Just over one in ten TCS clients reported that TCS services had a strong impact on something they improved or introduced (13 per cent).

Overall satisfaction

In line with results from the TCS Continuous Online Client Survey, 83 per cent of respondentss rated themselves as satisfied or very satisfied with the service they received. This is a sizable increase from the 66 per cent recorded in 2009. Satisfaction is highest among the largest organizations, but notably less among small organizations and those receiving service in Canada.

Two in three clients say that they would definitely use the TCS again and/or recommend it to others. Adding in those who said that they would likely or probably return or recommend TCS services, the proportion rises to 86 per cent in each case. Very few clients would not use TCS services again or recommend TCS services to others. A Net Promoter Score[3] is calculated on the basis of removing the proportion of Detractors (providing a rating of 1 to 6 on 10 with regard to likelihood to recommend the TCS) from the proportion of Promoters (rating TCS services with a 9 or 10). The overall Net Promoter Score is 50 for TCS services. It is highest among the largest organizations and those receiving services related to investment and problem solving.

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[3] The Net Promoter Score was developed by Satmetrix, Bain & Company and Fred Reichheld in 2003 and is used to measure the customer experience. http://www.netpromoter.com

Just under half of TCS clients also received trade promotion services from other trade promotion organizations in Canada. Among these, roughly three in ten rated TCS services as better than other services they have received in terms of overall quality, timeliness and impact on their organization. Between 18 and 22 per cent rate TCS services as inferior to those provided by other organizations. Again, satisfaction is highest among the largest organizations.

Overall conclusions and considerations

- Overall satisfaction with TCS services received over the 18 months under study is very high at 83 per cent, which is consistent with results obtained 60 days after service delivery in the Continuous Client Survey.
- Current survey results indicate that the TCS has a strong positive impact on its clients' access to and understanding of the foreign markets, their confidence to act, their financial bottom line, and their transfer of new technologies to other countries and workforce expansion.
- Going forward, the TCS can play an important role in supporting clients in areas where they have identified their greatest needs for assistance and their challenges in the next few years, particularly regarding obtaining qualified contacts in desired markets, and gathering information about local organizations/companies and the regulatory requirements in other countries.
- Given the general lower satisfaction among small organizations, it is recommended that additional in-depth and qualitative research be undertaken to better understand the nature of this low rate. A more in-depth analysis should lead to implications for additional communications about the services offered by the TCS, additional steps in preparing TCS staff to deal with these requests and, ultimately, increased satisfaction.
- Given the pronounced difference between those services which clients reported having received and the actual services recorded in the administrative data noted in this survey, there is also a pressing need to explore the underlying reason in order to increase the accuracy and reliability of feedback related to service needs and experiences.
- The current survey suggests a number of considerations for future client questionnaires including a significantly more focused survey of less than 15 minutes, more frequent collection (e.g., annually), more refined segmenting of clients who have received a service versus those who accessed but did not received services, and the possible addition of specific questions designed to measure financial impact of services received.

SOMMAIRE

Le Service des délégués commerciaux du Canada (SDC), une composante d'Affaires étrangères, Commerce et Développement Canada (MAECD)[4], consulte depuis 14 ans ses clients au sujet de leurs expériences. Les résultats du Sondage exhaustif de 2013 auprès des clients du SDC apportent une information essentielle concerrnant les réalisations en matière de service, la satisfaction des clients et leurs besoins. Cette information sera utile au Ministère pour son rapport annuel sur le rendement et les résultats de ses programmes, de même que pour satisfaire aux exigences du Conseil du trésor sur la nécessité d'obtenir la rétroaction des clients touchant les résultats d'un programme ou d'un service. Les gestionnaires se serviront des renseignements sur le rendement obtenus au moyen du présent sondage afin de déceler les domaines où une recherche plus poussée s'impose afin de bien saisir les besoins particuliers des clients et d'en tenir compte dans les priorités et les objectifs de l'amélioration des services. Enfin, le sondage de 2013 constitue pour le Ministère l'occasion de comparer le rendement du SDC avec celui d'autres organismes fédéraux et provinciaux de promotion du commerce international, et de déterminer si les modifications apportées dans ses approches et méthodes, notamment la Stratégie commerciale mondiale, les pratiques sectorielles et le Modèle axé sur le commerce d'intégration, ont été bénéfiques pour ses clients.

Les observations du présent sondage s'ajoutent à celles que permet de recueillir le Sondage automatique en ligne que le SDC demande à tous ses clients de remplir 60 jours après avoir obtenu un service particulier, en vue de mesurer les éléments qui en ont fait un service de qualité du point de vue de ses répercussions commerciales à court terme. Le sondage exhaustif auprès des clients du SDC diffère en ce qu'il se concentre sur les impressions que les clients retiennent des services du SDC livrés sur une plus longue période, soit dix-huit mois, et qu'il cerne d'autres aspects du service ainsi que les résultats obtenus à plus long terme, comme la conclusion d'ententes commerciales et l'apport du SDC à cet égard. De plus, le sondage exhaustif auprès des clients est de nature prospective puisqu'il y est question des genres de marchés pour lesquels les clients pourraient à l'avenir avoir recours aux services du SDC.

Le sondage exhaustif auprès de 1 222 clients s'est déroulé en avril et mai 2013, après l'envoi effectif par courriel d'invitations à l'univers des 17 255 organisations qui ont obtenu l'aide du SDC durant la période allant du 1er juillet 2011 au 31 décembre 2012. Le taux de réponse au sondage est de 7 p. 100. Les caractéristiques de l'échantillon définitif de 1 222 clients reflètent la population quant au lieu, au secteur et aux services reçus. Cependant, comme pour les sondages précédents, la population sondée ne constitue pas un échantillon représentatif du groupe cible des clients du SDC; par conséquent, on ne peut généraliser les résultats du présent sondage à l'ensemble des clients. Le rapport que voici fournit dans la mesure du possible des comparaisons avec les résultats du sondage de 2009 auprès des clients.

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4 Le nom du Ministère a été modifié le 26 juin 2013, d'Affaires étrangères et Commerce international Canada (MAECI) en celui d'Affaires étrangères, Commerce et Développement Canada (MAECD).

Le rapport permettra de savoir dans quels domaines de la prestation du service il convient de poursuivre la recherche afin d'évaluer l'efficacité du SDC et et de son impact sur les clients. Le coût de la présente recherche s'élève en tout à 34 973,95 $.

Profil des clients du SDC

De façon générale, les clients du SDC ont leur siège social, leurs installations de fabrication ou de R-D en Ontario, au Québec ou en Colombie-Britannique (sept sur dix). La vaste majorité des clients ont leur siège social au Canada (près de neuf sur dix). Plus de six clients sur dix (61 p. 100) sont de petites entreprises (moins de 100 employés), 17 p. 100 sont des organisations de taille moyenne (de 100 à 499 employés) et 18 p. 100 sont de grandes organisations (500 employés ou plus). Le revenu provenant de leurs activités mondiales varie énormément d'un client à l'autre, allant de 12 p. 100 qui enregistrent moins de 250 000 $ à 23 p. 100 dont le revenu dépasse les 25 millions de dollars.

La plupart des clients (plus de huit sur dix) transigeaient déjà à l'échelle internationale lorsqu'ils se sont adressés au SDC, dont 36 p. 100 qui souhaitaient alors trouver de nouveaux débouchés à l'étranger. Leurs principales raisons de rechercher des occasions d'affaires sur la scène internationale sont l'exportation de biens (57 p. 100) et l'exportation de services (31 p. 100).

On a demandé aux clients d'identifier les trois marchés les plus importants pour eux. Environ la moitié des clients du SDC s'attendent à ce que la région où leur organisation prévoit le plus prendre de l'expansion, affronter des obstacles ou trouver des occasions d'affaires au cours des trois prochaines années est celle des États-Unis (51 p. 100), suivie de près par la région de l'Asie du Sud ou du Sud-est (45 p. 100) et les vingt-sept pays de l'Union européenne (43 p. 100).

Profil du service

La plupart des répondants sont des entreprises privées situées au Canada qui ont demandé des services du SDC à partir de l'étranger ou au Canada même (75 p. 100). Un sur six (16 p. 100) est un partenaire des secteurs public ou sans but lucratif, comme un gouvernement provincial, une école ou une association, et un sur dix (9 p. 100) est une filiale d'une entreprise canadienne établie dans un autre pays, appelée bureau canadien à l'étranger (BCE).

La majorité des clients (77 p. 100) ont eu accès aux services du SDC s'inscrivant dans le cadre du secteur d'activité faisant la promotion du commerce. Moins de 6 p. 100 des clients ont fait appel aux services offerts dans chacun des autres secteurs d'activité du SDC[5]. Presque tous les clients du SDC avaient auparavant obtenu les services d'une ambassade, d'un haut-commissariat, d'un consulat ou d'un bureau commercial du Canada situé à l'étranger (91 p. 100). Les services que les clients disent le plus souvent avoir reçus du SDC consistent en de l'aide pour trouver des contacts (69 p. 100) ainsi qu'une

[5] Les autres secteurs d'activité du SDC sont les suivants : Attirer les investissements directs étrangers; Innovation, science et technologie; Politique commerciale / Accès aux marchés et l'Investissement direct canadien à l'étranger.

préparation aux marchés mondiaux (61 p. 100). Quant au service reçu le plus récemment au cours des dix-huit derniers mois, les plus souvent cités sont l'obtention de contacts qualifiés (44 p. 100) et une préparation aux marchés mondiaux (25 p. 100).

Satisfaction à l'égard du dernier service reçu

Une forte majorité des clients sont satisfaits de divers aspects du dernier service qu'ils ont reçu : ils s'accordent à dire que le personnel comprenait assez bien la dynamique de l'entreprise ou du secteur spécifique pour apporter une lvaleur ajoutée aux efforts de développement de leur entreprise (81 p. 100, soit une hausse en regard de 74 p. 100 en 2009), et que le délai avant d'obtenir ce dont ils avaient besoin leur était raisonnable (77 p. 100, l'équivalent de 78 p. 100 en 2009). La satisfaction est élevée quel que soit le genre de service obtenu.

La satisfaction des clients à l'égard des services particuliers qu'ils ont reçus est également supérieure en général à celle de 2009 :

- Plus de huit répondants sur dix qui ont bénéficié d'une évaluation de leur potentiel dans un marché cible estiment que les renseignements qu'ils ont reçus sur ce marché leur ont été utiles (85 p. 100, soit une hausse de 14 points en regard de 2009). Près de huit de ces répondants sur dix affirment que les renseignements qu'on leur a fournis cernaient à la fois les possibilités d'affaires et les difficultés potentielles (78 p. 100, soit une hausse de 15 points en regard de 2009).
- Huit répondants sur dix qui ont reçu des services pour les aider à trouver des contacts qualifiés dans leur marché cible jugent que les personnes-ressources qui leur ont été recommandées étaient les personnes indiquées avec qui faire des affaires (79 p. 100, soit sept points de plus qu'en 2009).
- Plus de huit répondants sur dix qui ont reçu des conseils pour les aider à surmonter des défis commerciaux les ont trouvés utiles (83 p. 100 se disent d'accord, soit un taux semblable à celui de 81 p. 100 en 2009). Les trois quarts s'accordent à dire que lorsque les employés n'étaient pas en mesure de leur donner l'aide voulue, ils leur ont recommandé les bonnes personnes-ressources (75 p. 100, soit six points de plus qu'en 2009).
- En outre, plus de huit répondants sur dix qui ont reçu des services pour les préparer aux marchés internationaux ont trouvé utiles les renseignements qu'ils ont obtenus afin de comprendre la conjoncture globale du marché (85 p. 100; question non posée en 2009).

Satisfaction des clients à l'égard de l'Investissement direct étranger

Les clients de l'Investissement direct étranger (IDE) (n=34) se montrent particulièrement satisfaits de deux mesures : l'information et la documentation obtenues (80 p. 100) ainsi que les personnes-ressources recommandées (75 p. 100). Les deux tiers sont satisfaits de l'appui touchant les visites de lieu/site (65 p. 100) et ils sont un peu plus de la moitié à trouver que les employés étaient compétents et bien renseignés sur les possibilités d'investir au Canada (55 p. 100).

Besoins des clients

Les domaines où les clients disent avoir le plus besoin d'aide consistent à obtenir des recommandations de personnes-ressources (82 p. 100), de l'information sur les organisations ou compagnies locales (74 p. 100) et des renseignements sur les marchés (69 p. 100). Ces principaux besoins correspondent à ceux qui sont ressortis en 2009. Le besoin de recommandations sur les possibilités de partenariat en technologie ou en recherche et développement a augmenté (38 p. 100, soit neuf points de plus qu'en 2009). Deux autres domaines où les besoins sont importants sont mentionnés par un peu moins de la moitié des clients : de l'aide en matière de protection de la propriété intellectuelle, d'approvisionnement et de réglementation (46 p. 100) ainsi que pour comprendre les pratiques commerciales responsables (45 p. 100).

Obstacles

Les deux plus grands obstacles auxquels font face les clients résident dans l'incertitude quant aux exigences réglementaires des autres pays (55 p. 100) et l'absence de personnes-ressources dans les marchés convoités (53 p. 100). Il existe aussi des difficultés relativement moins importantes, comme en ce qui concerne la disponibilité ou la compétence de la main-d'œuvre (bien que 27 p. 100 y voient un obstacle majeur), les taxes ou permis d'exportation canadiens (21 p. 100) de même que le traitement discriminatoire ou arbitraire des investisseurs ou investissements canadiens (15 p. 100).

Incidence de l'aide du SDC

Les clients du SDC qualifient majoritairement de positive l'aide qu'ils ont reçue du SDC, notamment l'accès à de l'information qu'il leur aurait été difficile d'obtenir autrement (63 p. 100), l'accès à des clients ou à des partenaires qu'il leur aurait été difficile de joindre autrement (60 p. 100), l'amélioration de leur profil et de leur crédibilité dans des marchés étrangers (59 p. 100), une meilleure connaissance de l'environnement concurrentiel dans les marchés cibles (55 p. 100), l'obtention et l'évaluation de renseignements sur le marché avant de décider de poursuivre ou non une occasion d'affaires (54 p. 100) et le regain de confiance pour explorer un marché étranger ou y accroître ses activités (54 p. 100). Ces fréquences sont à peu près les mêmes qu'en 2009. Les autres impacts sont mentionnés par moins de la moitié des clients et dans une fréquence semblable à celle de 2009. Les clients citent moins souvent cette fois le fait d'éviter les erreurs et délais (36 p. 100, soit huit points de moins qu'en 2009).

Résultats de l'aide obtenue du SDC

Depuis le 1er juillet 2011, la moitié des clients ont poursuivi des négociations commerciales (51 p. 100, du même ordre que 55 p. 100 en 2009). Environ la moitié de ces clients (49 p. 100 ou 25 p. 100 de l'ensemble) ont conclu l'entente commerciale visée, soit une proportion semblable à celle de 2009

(47 p. 100). Un peu plus de la moitié des clients qui ont conclu une entente commerciale en ont aussi tiré des résultats financiers (55 p. 100 ou 16 p. 100 de l'ensemble), ce qui correspond au taux de 60 p. 100 obtenu en 2009.

Parmi les clients qui disent avoir obtenu des résultats financiers, il s'agit surtout de résultats dans l'exportation de biens (65 p. 100) et l'exportation de services (44 p. 100), ce qui correspond aux principales raisons que donnent les clients de s'intéresser aux marchés internationaux. L'ampleur de ces résultats financiers va de moins de 25 000 $ (11 p. 100) à plus de 50 millions de dollars (6 p. 100).

Près de deux clients du SDC sur trois qui ont atteint des résultats financiers sous forme d'exportation de biens ou de services (n=166) qualifient la contribution du SDC d'élevée (31 p. 100) ou de moyenne (33 p. 100). Ces résultats correspondent de près à ceux de 2009. Seulement le quart de ces clients sont d'avis qu'ils auraient obtenu les mêmes résultats sans l'aide du SDC (23 p. 100); ils sont toutefois les deux tiers à attribuer ce résultat en partie du moins à la contribution du SDC, un peu comme en 2009.

Six clients sur dix parmi ceux qui ont déclaré un résultat financier affirment que celui-ci n'a pas eu d'effet sur la taille de la main-d'œuvre au Canada (62 p. 100). Ils sont plus du tiers à avoir constaté un effet positif sur la main-d'œuvre (36 p. 100), soit en moyenne une hausse de 15 p. 100 (les hausses plus élevées parmi les petites organisations font grimper cette moyenne).

Transfert de nouvelle technologie

Parmi les clients du SDC selon qui l'aide du SDC a entraîné la conclusion de nouvelles ventes ou ententes de partenariat avec des partenaires étrangers, le quart affirment que ces nouveaux partenariats ont mené à un transfert de nouvelle technologie (24 p. 100). Dans la majorité des cas, la technologie est allée du Canada vers le partenaire étranger (80 p. 100). Dans un cas sur cinq, le transfert de la technologie s'est fait du partenaire étranger vers le Canada (20 p. 100). Trois sur dix indiquent la mise sur pied de programmes communs de recherche et développement (29 p. 100).

Les clients du SDC sont entre un sur trois et un peu moins de quatre sur dix à affirmer qu'ils ont lancé ou amélioré des biens, des services ou des méthodes de fabrication ou de production à l'échelle nationale, internationale ou les deux à la fois.

En majeure partie, l'effet du SDC sur le transfert de technologie varie de faible (57 p. 100) à moyen (23 p. 100). Ce n'est que pour un peu plus d'un client sur dix que les services du SDC ont eu un effet important sur ce qu'ils ont lancé ou amélioré (13 p. 100).

Satisfaction globale

En conformité avec les résultats du Sondage automatique en ligne auprès des clients du SDC, 83 p. 100 des répondants se disent satisfaits ou très satisfaits du service qu'ils ont obtenu. Il s'agit d'une nette augmentation en regard du taux de 66 p. 100 enregistré en 2009. Le taux de satisfaction est au plus fort parmi les plus grosses organisations, et il est beaucoup plus faible parmi les petites organisations et celles qui ont obtenu leur service au Canada.

Deux clients sur trois répondent qu'il est très probable qu'ils aient de nouveau recours au SDC ou qu'ils le recommandent à d'autres. En tenant compte de ceux qui jugent probable d'avoir de nouveau recours aux services du SDC ou d'en faire la recommandation, la proportion s'élève alors à 86 p. 100 dans un cas comme dans l'autre. Très peu de clients n'auraient pas de nouveau recours aux services du SDC ou ne les recommanderaient pas à d'autres. On obtient un taux de prescription[6] en soustrayant la proportion de détracteurs (qui attribuent une note de 1 à 6 sur 10 à la probabilité de recommander le SDC) de la proportion de prescripteurs (qui attribuent aux services du SDC la note de 9 ou 10). Ainsi, les services du SDC obtiennent un taux de prescription de 50. Le taux le plus élevé se trouve parmi les plus grandes organisations et celles qui ont obtenu des services en matière d'investissement et de résolution de problème.

Un peu moins de la moitié des clients du SDC ont aussi obtenu des services en matière de promotion du commerce d'un autre organisme canadien de soutien au commerce international. parmi ces derniers, environ trois sur dix estiment que les services du SDC sont bien meilleurs que ceux qu'ils ont reçus d'un autre organisme du point de vue de la qualité en général, de la rapidité de la prestation et de leur incidence sur leur organisation. Entre 18 et 22 p. 100 trouvent que les services du SDC sont inférieurs à ceux offerts par d'autres organismes. La satisfaction est ici encore plus élevée parmi les plus grandes organisations.

Conclusions et considérations générales

- La satisfaction à l'égard des services offerts par le SDC au cours des dix-huit mois à l'étude est très élevée, soit 83 p. 100, ce qui correspond aux résultats obtenus 60 jours après la fourniture du service, dans le Sondage automatique en ligne auprès des clients.
- Il ressort des résultats du présent sondage que le SDC influe très positivement sur l'accès des clients aux marchés étrangers et la compréhension qu'ils en ont, la confiance qui les pousse à agir, leur bénéfice net, leur transfert de nouvelles technologies vers d'autres pays de même que la croissance de la main-d'œuvre.

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[6] Le *Net Promoter Score (NPS)*, ou taux de prescription, a été mis au point par Satmetrix, Bain & Company et Fred Reichheld en 2003; il s'agit d'un outil de mesure de la propension des clients à recommander un service ou une entreprise. http://www.netpromoter.com

- Le SDC pourra à l'avenir jouer un rôle important afin de soutenir ses clients dans les domaines où ils ont exprimé les plus grands besoins d'aide et les plus fortes difficultés aux cours des quelques prochaines années, en particulier pour ce qui est d'obtenir des contacts qualifiés dans les marchés convoités, de recueillir de l'information sur les organisations ou les entreprises locales et de connaître la réglementation en cours dans les autres pays.
- Étant donné les taux de satisfaction généralement plus faibles parmi les petites organisations, il est recommandé d'entreprendre une recherche qualitative plus en profondeur afin de mieux saisir la nature de ce faible taux. En fouillant davantage les causes de ce faible taux, on verra sans doute qu'il y a lieu de renforcer la communication au sujet des services offerts par le SDC et de mieux préparer le personnel du SDC à traiter les demandes qui lui sont faites ce qui, en fin de compte, sera le gage d'une satisfaction accrue.
- Vu la différence marquée entre les services que les clients affirment avoir reçus et ceux qui, selon les données administratives de l'étude, leur ont été effectivement fournis, il est également urgent d'examiner les raisons de cet état de fait en vue d'améliorer l'exactitude et la fiabilité de la rétroaction touchant les besoins et les expériences en matière de services.
- Diverses considérations se dégagent du présent sondage en ce qui concerne les prochains questionnaires destinés aux clients, notamment la nécessité d'un sondage beaucoup plus ciblé et qui dure moins de 15 minutes, une collecte des données plus fréquente (p. ex., annuelle), une segmentation mieux définie des clients qui ont reçu un service et des personnes qui se sont renseignées mais sans recevoir de service, de même que l'ajout de questions spécifiques destinées à mesurer les répercussions financières des services reçus.

1. INTRODUCTION AND METHODOLOGY

The Trade Commissioner Service (TCS) is a component of Foreign Affairs, Trade and Development Canada (DFATD)[7] which provides expert advice and support to Canadian businesses on matters related to exploring and growing opportunities in foreign markets, improving access to foreign markets, attracting foreign investment, Canadian Direct Investment Abroad, and innovation. With offices across Canada and its presence in more than 150 cities worldwide, the TCS helps thousands of businesses each year. The Trade Commissioner Service also works with partner organizations such as provincial or municipal governments or industry associations that deliver programs and services to Canadian businesses.

DFATD has conducted its Comprehensive Client Survey of the TCS (in 1999, 2000, 2002, 2004 and 2009) to gauge the satisfaction of its clients and to gain an understanding of some of the qualities of TCS services that clients place high value on. DFATD strives to conduct this survey approximately once every three years to keep knowledge of client perceptions and results up-to-date. The 2013 survey will be used to track changes from previous years[8], as well as to provide an opportunity to introduce benchmarks for TCS service delivery to be measured again in future iterations of the survey.

The objectives of this survey are to assess whether the TCS is maintaining its efforts from previous years to better respond to client needs and improve on the service provided to its clients, business organizations and partners. In addition, DFATD will use the results from the 2013 Comprehensive Client Survey to provide necessary information about service achievements, client satisfaction and needs which will support DFATD's annual departmental performance report on the results of its programs, as well as Treasury Board requirements to obtain evidence of program/service results. Furthermore, Treasury Board previously identified the measurement, use and publication of client satisfaction and service standards as an area that DFATD can make improvements to, indicating the need for more comprehensive knowledge about TCS clients and services and demonstrated commitment to use this knowledge to improve performance relative to service delivery. Managers will use performance information gathered through this survey to identify areas where further research will be required to understand specific client needs and inform priorities and goals for service improvement. Finally, the 2013 survey presents the opportunity for the department to compare TCS performance to other federal and provincial international business promotion organizations and determine if changes in approaches and practices including the Global Commerce Strategy, sector practices and the Integrative Trade Model, have had a positive impact on clients.

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7 The name of the department was changed to Foreign Affairs, Trade and Development Canada (DFATD) from Foreign Affairs and International Trade Canada (DFAIT) on June 26, 2013.

8 Trade Commissioner Service Client Survey – 2009
http://www.tradecommissioner.gc.ca/eng/document.jsp?did=97435

This survey will supplement information that is gathered through the TCS Continuous Online Client Survey, which is administered to all clients 60 days after a specific TCS service is closed in order to measure the quality elements of that particular service in light of its short-term commercial impact. The TCS Comprehensive Client Survey differs in that it focuses on the impressions of clients about TCS services delivered during an 18-month period to capture longer-term results obtained after receiving the service, such as those related to the conclusion of commercial agreements, and the contributions made by the TCS. In addition, the Comprehensive Client Survey is forward-focused: for example, it inquires about the kinds of markets for which clients are likely to require TCS services in the future.

a) Methodology

The methodology for the survey was a self-administered online survey with the target population of TCS clients captured in TRIO, the electronic Client Relationship Management (eCRM) system. The population included 17,255 clients that received a service between July 1, 2011 and December 31, 2012. An online methodology was selected because it is known to yield quality results while being cost efficient.

The questionnaire includes both scaled questions and selected items from the Common Measurement Tool[9] (CMT) questions as well as open-ended questions to allow clients the opportunity to provide richer comments. The questionnaire took an average of approximately 25 minutes to complete online. Many items were repeated from the 2009 TCS Comprehensive Client Survey and a few were taken from the TCS Continuous Online Client Survey. Questions on service standards were removed because this information is captured through the ongoing client survey. Roughly one-quarter of the survey items in the 2013 Comprehensive Client Survey questionnaire are new and some items from the 2009 survey were adapted somewhat in 2013. New items related to the transfer of new technology to or from foreign markets, and a comparison of TCS services with those received from other Canadian trade promotion organizations. The questionnaire was designed on the basis of a thorough review of the 2009 questionnaire and identification of new issue areas to be covered. This was achieved through a series of consultations held with members of an Advisory Working Group created in July 2012 for the purposes of survey development. Stakeholders were provided with several opportunities to review the survey questionnaire and to discuss possible changes and additions. The final result was a balance between information needs and length of the questionnaire, as well as need to track previous survey items from 2009 and new items to address new issue areas.

Once the design phase was completed, the survey was programmed into CATI software and pre-tested with a sample of TCS clients (17 English, four French). A total of 434 invitations were successfully sent. Of these 310 were sent to clients in Quebec in order to augment the number completed in French. The objective of the pre-test was to test the instrument in terms of sequencing and clarity of the

9 The Common Measurement Tool (CMT) used for assessing client satisfaction is maintained by the Institute for Citizen-Centred Service and was developed by Canadian federal, provincial, and territorial representatives of the Public Sector Service Delivery Council. http://www.iccs-isac.org/cmt/about-the-cmt

questions and the length of time required to complete the survey. An additional set of questions was placed at the end of the survey instrument to gather feedback about the questionnaire (e.g., length, flow, clarity of questions and categories, missing questions). No significant changes were required to the instrument based on comments or survey findings.

Once the survey was programmed, tested and mounted on a secure website hosted by EKOS Research, the Chief Trade Commissioner issued advance communications about the survey, informing client representatives that the survey was coming and allowing them the opportunity to opt out of the survey. Once any requests to be removed from the circulation list were addressed, invitations were sent to all remaining clients. A list of client ID's was then provided (in an Excel spreadsheet) to the supplier including administrative information about the organization such as industry sector, region and location of the service, along with type of service provided. No contact information about client organizations was provided to EKOS Research.

The TCS sent a bilingual e-mail invitation message to clients with a link to the English and French questionnaires. Each link was unique to the recipient, with a unique Personal Identification Number (PIN) embedded in the hyperlink to eliminate the possibility of duplicate responses. The e-mail message included a brief description of the survey and assurance of confidentiality, along with a hypertext link to the survey website. The message also provided a 1-800 telephone number respondents could call if they preferred to complete the survey by telephone rather than over the Internet, although no active attempts were made by EKOS to reach TSC clients by telephone.

Once invited, participants clicked on the survey link. Their browser was then directed to a website containing the survey instrument, where they were taken through the questionnaire, page by page. The survey name figured prominently in the e-mail invitation and on the survey itself (particularly on the cover page). The PIN allowed respondents to go back into a case at any time to complete or change information before it was completed (submitted by clicking the link provided). Once the questionnaire was completed and submitted, however, the particular case was locked ensuring that only the clients assigned a PIN could gain access to the survey and cases could not be completed more than once.

Participants were informed (i.e., in the initial e-mail invitation and in the introduction online) of their rights under the Privacy and Access to Information Acts and ensured that those rights would be protected throughout the research process. This included: informing participants of the purpose of the research; identifying both the sponsoring department and research supplier; informing participants that participation was voluntary and the information provided would be administered according to the requirements of the Privacy Act.

EKOS maintained bilingual technical support for the survey throughout the data collection period. Respondents were given both a 1-800 number to call and an e-mail address for support. Only five cases were completed by telephone.

The survey was conducted in April and May 2013, with the initial invitation sent on April 17-18 and reminders sent on April 24 and May 8. The survey was closed on May 31. Excluding client records with invalid email addresses or atherwise unavailable, 17,255 may have received the survey invitation. A total of 2,226 TCS clients accessed the survey link. Of these, 247 declared themselves as ineligible to participate (i.e., did not recall receiving a service from the TCS). Of the remaining 1,979, 757 chose not to continue with the survey (with roughly one in three dropping off at the introduction, just under half dropping off in the first few questions and the remainder dropping off over the course of the first half of the survey questionnaire). The final sample includes 1,222 completed client records, of which 1,133 were completed in English and 89 in French. The response rate for the survey is 7 per cent; which is lower than the 12 per cent found in the 2009 survey. It is not surprising, however, that it is lower than the 18 per cent obtained for the Continuous Online Client Survey, which is administered within 60 days of obtaining the service and is a considerably shorter questionnaire (approximately 5 minutes). Concurrent running of the Continuous Online Client Survey with the more detailed Comprehensive Client Survey may also have resulted in some confusion or an increase in the overall response burden and therefore increased refusal to participate.

A thorough review was conducted of the survey data set to ensure that appropriate responses were included and followed the appropriate skip patterns. Only two survey items featured an open ended question, which were generally reviewed but not close coded. A comparison of the final sample of 1,222 against the population of 17,255 clients served during the period of July 1, 2011 to December 31, 2012 indicates that sample characteristics are largely reflective of the population. Based on a comparison of the sample distribution by sector, region, type of organization, business line and type of service received, only very slight corrections were required by region, to correct for a minor under representation among organizations located in Quebec (to 21 per cent instead of the 17 per cent in the final sample) and by service received to correct for a minor under representation of organizations assisted with preparing for international markets (from 15 per cent in the actual sample to 17 per cent in the population). Once the data were cleaned and weighted, banner tables were produced, providing topline responses to each survey question, along with responses for key segments of the client population (e.g., by region, size and sector, as well as by services received, location of services received, and expected top markets over the coming three years).

This is a survey census that is not representative of any broader population, and therefore, the results do not have a margin of error but are directional. This report will be used to identify specific areas of service delivery where further research can be conducted to assess the effectiveness of the TCS service and its impact on clients.

2. Survey Results

2.1 Location and Size

Table 2.1 provides a summary of clients by their location and size.

Table 2.1: Client Profile

	2013 (n=1222)	2009 (n=1449)
Location of company (Self-reported)		
Atlantic	8%	12%
Quebec	19%	22%
Ontario	35%	41%
Prairies and Territories	13%	20%
British Columbia	16%	19%
Sector identified in TRIO (Administrative data)†		
Key Proactive	49%	
Ongoing Proactive	15%	
Key Responsive Sectors / Other	35%	
Please indicate where your organization's ultimate global parent is located. Is it headquartered in...:		
Canada	88%	89%
United States	5%	4%
Europe	3%	3%
Asia	1%	1%
Mexico or Central America (including the Caribbean)	0%	1%
South America	0%	0%
Middle East	0%	0%
Africa	0%	0%
Decline	2%	2%
How many employees do you have in your organization? Please include employees from all locations in your organization.		
Fewer than 10	26%	26%
10 to 49	27%	29%
50 to 99	8%	12%
100 to 499	17%	15%
500 to 999	3%	4%
1000 or more	15%	12%
Don't know / Decline	4%	2%

	2013 (n=1222)	2009 (n=1449)
What were your organization's total worldwide sales and revenues (including domestic sales) in Canadian dollars for your organization's most recent annual financial reporting period?		
Less than $250,000	12%	11%
$250,000 to less than $1 million	9%	10%
$1 million to less than $5 million	14%	16%
$5 million to less than $25 million	13%	18%
$25 million or more	23%	21%
Not applicable	13%	14%
Decline / Don't know	16%	10%

† See Table 2.2 for description of sectors.

a) Geographic Location

As shown in Table 2.1, 35 per cent of TCS clients have their organization's headquarters, manufacturing and/or R&D facilities located in Ontario, while there is a fairly even split between Quebec (19 per cent) and British Columbia (16 per cent). Smaller proportions are located in Atlantic Canada (eight per cent), Alberta (eight per cent), and Saskatchewan/Manitoba and the Territories (five per cent altogether).

b) Global Parent Location

TCS clients are headquartered primarily in Canada (88 per cent). Those based outside of Canada are located across the globe including the United States (five per cent), Europe (three per cent), and Asia (one per cent).

- Organizations based in Atlantic Canada are more likely than those elsewhere in Canada to have a Canadian parent company.
- The largest organizations in terms of employees and revenues more often have American global parent companies.

c) Number of Employees and Revenue

The majority of TCS clients are small businesses, including one-quarter (26 per cent) who are micro-businesses of fewer than ten employees, 27 per cent who have 10 to 49 employees and 8 per cent who have 50 to 99 employees. Seventeen per cent are considered to be medium-sized organizations, working with 100 to 499 employees, while eighteen per cent are large, with 500 or more employees[10].

[10] Standard size classifications used by Statistics Canada are: Small (1-99 employees); Medium (100 to 499 employees) and Large (500 or more employees).

In terms of their total worldwide (including domestic) sales and revenues, total figures range from less than $250,000 (12 per cent) to $25 million or more (23 per cent), with half of clients (50 per cent) documenting $1 million or more. Note that 29 per cent of clients provided no estimate in response to this question.

- The smallest organizations are more likely to be located in British Columbia.

Results indicate that the smallest organizations generally reported lower satisfaction levels across a range of dimensions. These results can be found throughout the report.

d) Sector/Industry

Almost half of TCS clients represent industries classified by the TCS as Key Proactive Sectors (49 per cent). Ongoing Proactive Sectors make up 15 per cent of TCS clients. More than one in three is classified under the Key Responsive and All Other Sectors (35 per cent). The following table shows how industries are classified within the three sectors.

Table 2.2: List of Sectors Under Three Broad Sector Categories

Key Proactive Sectors (49%)	Ongoing Proactive Sectors (15%)	Key Responsive Sectors / All Other Sectors (35%)
› Aerospace and Defence (including Space) › Cleantech (includes Electric Power Equipment and Services and Environmental Industries) › Information and Communications Technology (ICT) › Life Science (includes Bio-Industries and Heath Industries) › Service Industries and Capital Projects	› Automotive › Building Products and Construction › Forest Industries › Metals, Minerals & Related Equipment, Services & Technology › Oil and Gas Equipment and Services	› Advanced Materials › Agricultural Technology and Equipment › Agriculture, Food and Beverages › Arts and Cultural Industries › Chemicals › Consumer Products › Education › Fish and Seafood Products › Manufacturing Technologies › Ocean Technologies › Plastics › Rail and Urban Transit › Space › Tourism › Undetermined

2.2 INTERNATIONAL ACTIVITY

Most TCS clients were already doing business internationally including 36 per cent who are interested in expanding to new countries. Eight per cent are conducting business abroad for the first time.

The top reason TCS clients are interested in pursuing international markets is for the purposes of exporting goods (57 per cent). Three in ten (31 per cent) are interested in exporting services, while two in ten (22 per cent) are interested in opportunities for R&D or technology partnerships. Nearly equal proportions identified an interest in technology licensing or franchising and seeking project financing/venture capital (14 and 13 per cent, respectively).

About half of TCS clients expect that their organization's top region in terms of growth, obstacles or opportunities over the next three years will be the United States (51 per cent), followed closely by South/Southeast Asia (45 per cent) and the European Union's EU27 countries (43 per cent). South America (34 per cent), North Asia (25 per cent), and the Middle East (21 per cent) are also expected by many TCS clients to be top markets for growth, obstacles or opportunities. Compared with intended expansion in 2009, considerably more TCS clients are now considering the United States, Africa and the Middle East, and South America and Europe as top markets.

Table 2.3: International Presence

	2013 (n=1188)[11]	2009 (n=1412)
At the time of your most recent service, was your organization already active and/or doing business internationally?		
Yes, doing business internationally	49%	51%
Yes, already doing business internationally but expanding to new country(ies)	36%	38%
First time doing business abroad	8%	7%
Not applicable	7%	5%
What were the main reasons for your organization's interest in international markets?		
Export of goods (products, commodities)	57%	58%
Export of services, including financial services	31%	29%
Seeking research and development and/or technology partnership opportunities	22%	13%
Licensing or franchising your technology internationally	14%	11%
Seeking international sources of project financing or venture capital	13%	6%
Making Canadian Direct Investment Abroad (CDIA) including a foreign acquisition, green field, equity investment or joint venture	8%	6%
Sourcing foreign inputs, components, services or other imports to remain competitive	7%	4%

[11] Excludes Foreign Direct Investment clients in both years.

	2013 (n=1188)[11]	2009 (n=1412)
Acquiring or sourcing a foreign technology	5%	2%
Promote educational opportunities, recruit international students, education partnership	4%	--
Other	8%	--
Don't know / not sure	1%	--
Anticipated top 3 markets		
USA	51%	33%
South/Southeast Asia	45%	67%
North Asia	25%	
European Union (EU27)	43%	48%
Other European Markets	11%	
Middle East	21%	16%
Africa	17%	
South America	34%	18%
Mexico	14%	8%
Central America	13%	8%
Caribbean	6%	
Oceania	6%	6%

- Organizations located in Ontario are more likely than other organizations to be thinking about expansion of their international business.
- Also more apt to be expanding are clients who identified services received from the TCS (and their most recently accessed TCS service) as finding qualified contacts and those organizations that accessed TCS services in Africa/Middle East and the Caribbean, which are expected to be top markets for them over the next three years.
- Organizations accessing TCS services in North America and Asia-Pacific are more likely than others to have already had an international business presence (but not to be considering expansion).
- The largest organizations are more likely to already be conducting business abroad. The smallest organizations are the least apt to have conducted international business.
- Organizations most likely to have been interested in international markets for the export of goods are clients:
  - located in Canada;
  - in Key Responsive / All Other Sectors;
  - expanding their international business;
  - expecting to expand to Mexico and or the U.S.A.; and

    - mid-sized to large organizations in terms of revenue but smaller in terms of staff.

- Organizations more apt to have an interest in exporting services are:
    - Canadian Offices Abroad;
    - clients in Key Proactive Sectors;
    - clients who expect growth in the Caribbean/South America;
    - those accessing TCS services in the Caribbean/South America and Africa/Middle East; and also
    - larger organizations in terms of revenue.

- Interest in research and development or technology partnership opportunities is typically greater among:
    - TCS clients who are based in Atlantic Canada;
    - partner organizations;
    - clients in Key Proactive Sectors;
    - those expecting their top markets for growth to be Europe and Mexico/the U.S.A.;
    - smaller organizations; and
    - clients who were doing business internationally for the first time when they accessed TCS services.

- Clients were asked to choose their top three most important markets. Interest in the U.S.A. as a top market for growth is particularly high among organizations located in Ontario, clients in the Key Proactive Sectors, small organizations, and organizations who were doing international business for the first time.

- Interest in South/Southeast Asia is higher among clients in the Key Responsive / All Other Sectors and large organizations.

2.3 Service Profile

One in six clients (16 per cent) responding to the survey are public or not for profit sector partners such as provincial governments, schools, or associations. The large majority are private sector businesses based in Canada that accessed TCS services from abroad or within Canada (75 per cent).

According to TCS administrative client data, the clear majority of clients (77 per cent) accessed TCS services under the trade promotion business line. Services in other TCS business lines were accessed by fewer than six per cent each.[12] Almost all TCS clients have previously received services through an embassy, high commission, consulate or trade office located outside of Canada (91 per cent). More than one-third has received services from a regional office (36 per cent). In addition to these main points of contact, some have also accessed information through the TCS website (29 per cent) or the Invest in Canada website (three per cent). Overall, 62 per cent of clients responding to the survey accessed services only overseas, seven per cent accessed services only in Canada and 28 per cent accessed services from both Canada and abroad. It should be noted that respondents were able to select more than one response.

According to clients' own recollection, the top TCS services that clients were provided over the period of July 2011 through December 2012 are finding contacts (69 per cent) and preparation for international markets (61 per cent). Three in ten report that they have accessed services to help them assess their potential in target markets (31 per cent) or to resolve problems (29 per cent) during the 18 month period. Fewer have accessed services to support their decision to invest or expand operations in Canada (11 per cent) during that time.

Many survey items regarding satisfaction were asked in reference to the respondent's most recent service accessed during that 18 month period. More than two in five clients most recently obtained qualified contacts (44 per cent); one-quarter received services to prepare them for international markets (25 per cent); 13 per cent accessed services for resolving problems; and fewer than each received services to assess their potential in target markets (six per cent), to support their decision to invest or expand their operations in Canada (three per cent), or another service (nine per cent).

Overall, the client profiles in 2013 and 2009 are similar although fewer clients reported use (and recent use) of assistance preparing for international markets in 2009.

[12] The other TCS business lines are: Attracting Foreign Direct Investment; Innovation, Science and Technology; Trade Policy / Market Access; and Canadian Direct Investment Abroad.

Table 2.4: Service Profile

	2013 (n=1222)	2009 (n=1449)
Organization Type		
Canadian	75%	72%
Partner	16%	20%
Canadian Offices Abroad	9%	8%
Business Line		
Canadian Direct Investment Abroad (CDIA) and Corporate Social Responsibility	5%	N/A
FDI Attraction	4%	N/A
Innovation / Science and Technology	6%	N/A
Trade Policy / Market Access	6%	N/A
Trade Promotion	77%	N/A
Other	2%	N/A
Have you ever received a service offered by the Trade Commissioner Service (TCS) through…? (Multiple response)		
An embassy, high commission, consulate or trade office located outside of Canada	91%	91%
A TCS regional office (located in one of Canada's provinces)	36%	36%
The Trade Commissioner Service website	29%	33%
The Invest in Canada website	3%	N/A
Which of the following services offered by the TCS did you receive between July 1, 2011 and December 31, 2012 (Multiple response)		
Finding qualified contacts	69%	64%
Preparing you for international markets	61%	39%
Assessing your potential in target markets	31%	27%
Resolving problems	29%	25%
Supporting your decision to invest or expand your operations in Canada	11%	13%
Other	12%	--
Which of these services was the most recent service that you received? (Self-reported)		
Finding qualified contacts	44%	31%
Preparing you for international markets	25%	10%
Resolving problems	13%	10%
Assessing your potential in target markets	6%	4%
Supporting your decision to invest or expand your operations in Canada	3%	3%
Other	9%	0%

The largest organizations, with the largest staff complement and revenues, are more likely to have accessed services assisting them with problem solving, and to a lesser degree, assessing market potential. Smaller organizations with 10 to 99 employees are more likely than other organizations to be looking for qualified contacts.

Administrative information indicates that there are large discrepancies between a client's most recent service and what they recalled as their most recent service received. The services that organizations reported that they received from the TCS are not always the services that they actually received. For example, as shown in Table 2.5, only one in three of those who last received assistance in preparing for international markets said that this was the service they received. The same proportion said that they received information about qualified contacts. Of those last receiving assistance with resolving a problem, just over one in four said they found qualified contacts, and one in six said that they were assisted with preparing for international markets. More than four in ten of those who last received assistance with assessing market potential said that they received qualified contacts and another one in ten said they had a problem resolved. This may be because clients recognize the service differently or received more than one service, or because they misunderstood the timelines.

Table 2.5: Most Recent Service Received Reported by Clients Broken Down by Administrative Information on Service Last Received

	Type of service most recently received (Administrative data)			
	Market Potential Assessment	Prep for International Markets	Problem Solving	Qualified Contacts
Which of these services was the most recent service that you received? (Self-reported)				
n=	***344***	***183***	***124***	***571***
Preparing you for international markets	28%	34%	14%	23%
Assessing your potential in target markets	6%	8%	4%	5%
Finding qualified contacts	43%	35%	25%	53%
Resolving problems	11%	11%	43%	9%
Supporting your decision to invest or expand your operations in Canada	4%	2%	1%	3%
Other	8%	11%	13%	9%

2.4 Satisfaction with Last Service Received

Strong majorities of clients were satisfied with the last service that they received. Eight in ten (81 per cent) felt that staff understood enough about the dynamics of the specific business or sector involved to add value to their business development effort, an increase from three in four (74 per cent) in 2009. Three in four (77 per cent) felt that the amount of time they waited to obtain the service they needed was reasonable, on par with satisfaction levels in 2009 (78 per cent) as well as the Continuous Client Survey (76 per cent).

Figure 2.1

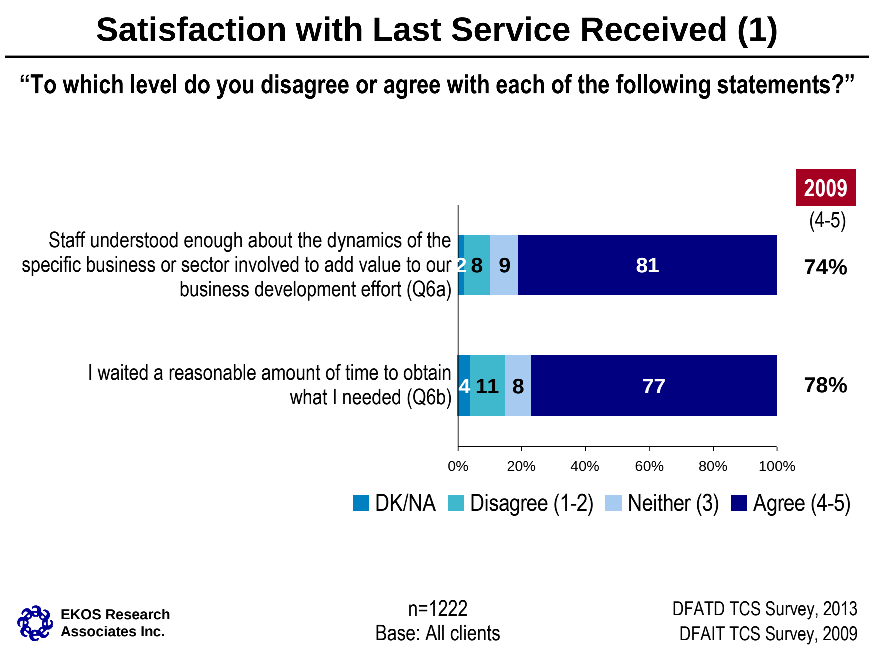


Table 2.6 shows that satisfaction with staff understanding of their business/sector and time required to obtain the service or information is high regardless of what the most recent service received was. Clients whose most recent service was finding qualified contacts are slightly more likely than those who received other services more recently to have been satisfied (84 per cent).

Table 2.6: Satisfaction with Service Based on Last Service Received

	Total 2009	**Total 2013**	**Most recent service received**					
			Prep for international markets	**Assess your potential**	**Finding qualified contacts**	**Resolve problems**	**Support decision to invest**	**Other**
% agree (4-5)								
n=	***1449***	***1222***	***310***	***70***	***535***	***159***	***34***	***114***
Staff understood enough about the dynamics of the specific business or sector involved to add value to our business development effort	74%	81%	83%	74%	**84%**	77%	77%	77%
I waited a reasonable amount of time to obtain what I needed	78%	77%	77%	71%	79%	74%	75%	76%

- Agreement that staff understood their business or sector was more likely to be high among Canadian Offices Abroad, large organizations, and clients who accessed TCS services in North America, as well as those identified as Foreign Direct Investment attraction clients in particular, although at least three in four of all client segments agreed.
- Mid- to large-size organizations and clients who accessed TCS services in North America are more likely to have been satisfied with the amount of time they waited to obtain the services they needed, although again, seven in ten or more of all client segments were in agreement. Lower levels of satisfaction found among the smallest organizations, generally seen as a theme across the survey results.

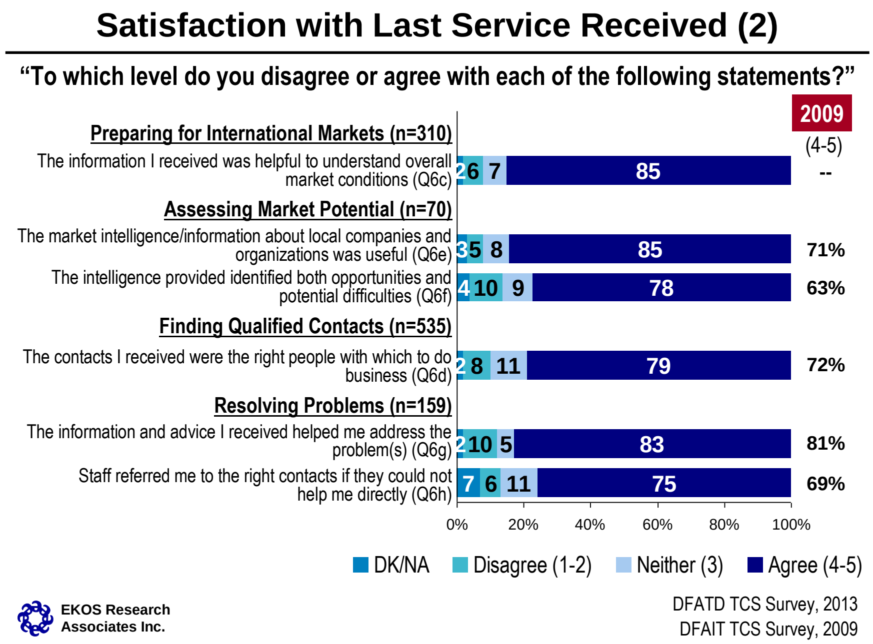
Of respondents who received services to prepare them for international markets, more than eight in ten (85 per cent) felt that the information they received was helpful for them to understand overall market conditions.

More than eight in ten clients who received services to assess their potential in target markets (85 per cent) felt that the market intelligence/information they received was useful, which is a substantial increase from seven in ten (71 per cent) in 2009. Nearly eight in ten of these same clients (78 per cent) say that the intelligence provided to them identified both opportunities and potential difficulties, again representing a considerable increase from 63 per cent who agreed in 2009.

Eight in ten clients who received services to assist them with finding qualified contacts in their target market (79 per cent) felt that they were provided with the right contacts with whom to do business, an increase from 72 per cent in 2009.

Clients who received services to help resolve problems related to business challenges are very likely to have found this advice to be useful with 83 per cent agreeing, consistent with results from 2009 (81 per cent). Three in four agreed that in cases where staff could not help them correctly, they received a referral to the right contacts (75 per cent), which is up from 69 per cent found in 2009.

Figure 2.2

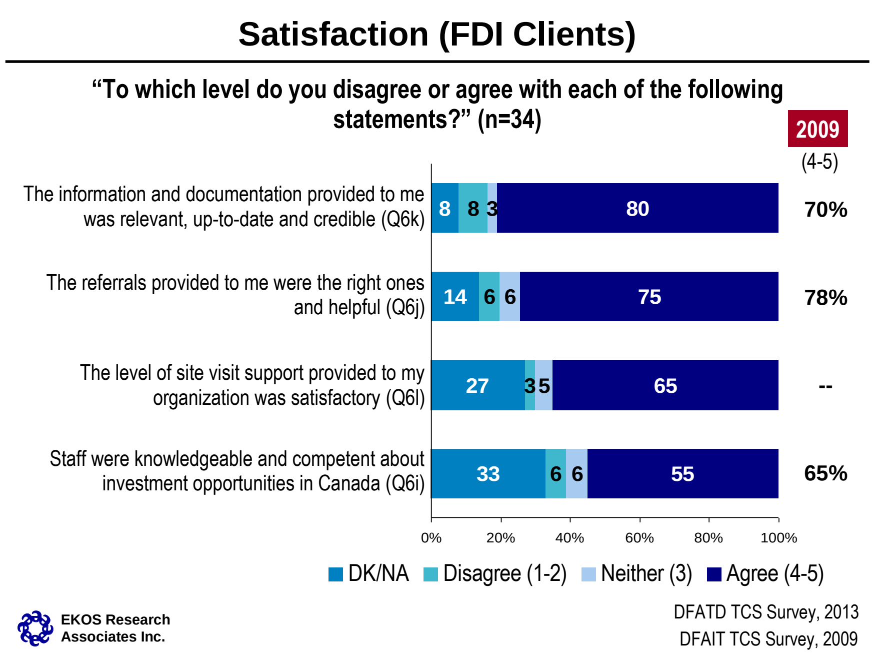


- Disagreement that the information received on overall market conditions was helpful was more likely to be evident among those who accessed TCS services in Africa (15 per cent).
- Among clients who received help finding qualified contacts, partner organizations are more likely to have been satisfied with the contacts they received, as are the largest organizations with regard to staff compliment.
- Among those who received help with solving business problems, more of the medium-to-small organizations (in terms of global sales) disagreed that they were referred to the right contacts when staff could not help them (19 per cent).

2.5 SATISFACTION (FOREIGN DIRECT INVESTMENT CLIENTS)

Among Foreign Direct Investment clients (n=34), eight in ten (80 per cent) felt the information and documentation provided to them was relevant, up-to-date and credible. This was measured at seven in ten (70 per cent) in 2009. Three in four (75 per cent) felt the referrals provided were the right ones and were helpful, which is in line with the 78 per cent found in 2009. A new question for investment clients, asked for the first time in 2013, found that about two in three (65 per cent) felt there was a satisfactory level of site visit support; a large proportion, however, answered "don't know" or that this was "not applicable" to them – 27 per cent. Just over half (55 per cent) felt that staff were knowledgeable and competent about investment opportunities in Canada. This was measured at 65 per cent in 2009; however, this measure was also not applicable to a large number of FDI clients (33 per cent).

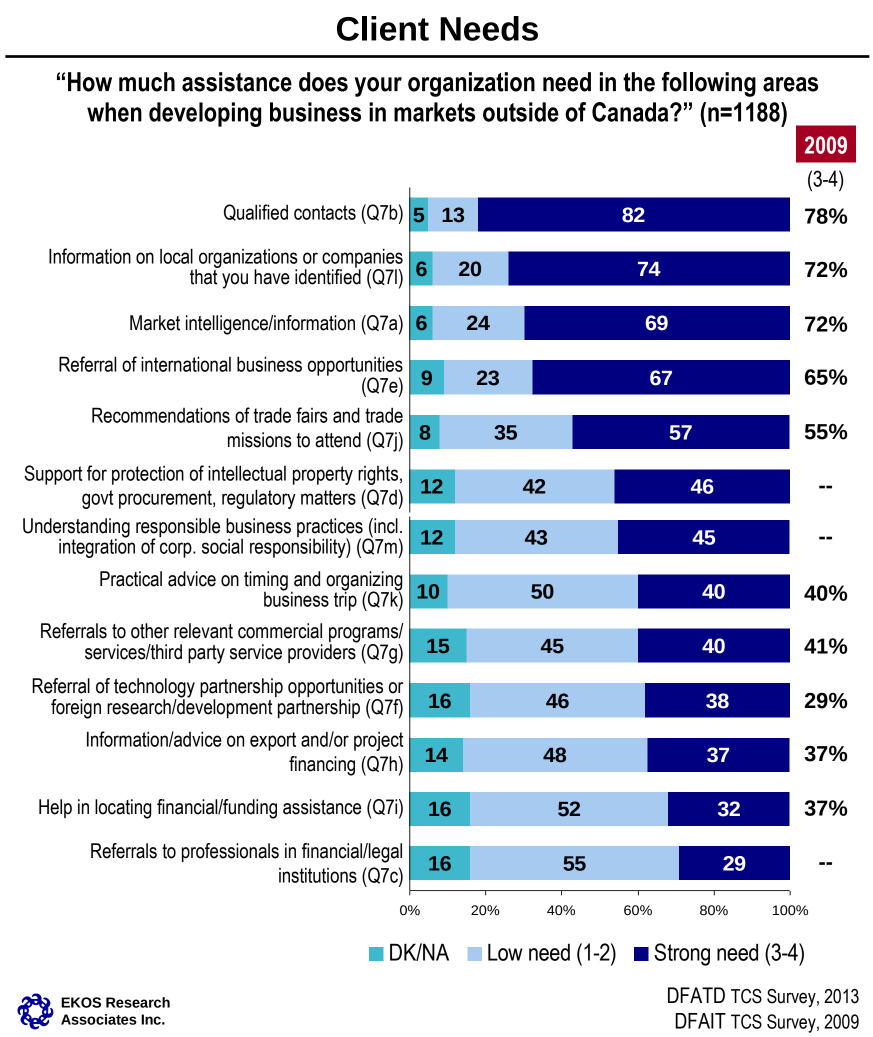
Figure 2.3



2.6 CLIENT NEEDS

The top areas where clients reported that they require assistance remain the same as three years ago. Obtaining qualified contacts is the top need, according to more than eight in ten (82 per cent), followed by getting information on local organizations/companies for three in four (74 per cent), proportions that are similar to or somewhat stronger than in 2009 (78 and 72 per cent, respectively). Seven in ten need market intelligence (69 per cent), which is in line with the 72 per cent found in 2009. More than half to two in three need referral to international business opportunities (67 per cent), and recommendations for trade fairs/missions to attend (57 per cent), needs that remain consistently strong from 2009 (65 and 55 per cent, respectively). Two other important areas of needs identified by just under half of clients are: support for protecting their intellectual property rights, procurement, and regulatory matters (46 per cent); and understanding responsible business practices (45 per cent). Other areas are low priority to more than four in ten to more than five in ten clients, with some noteworthy changes from 2009. There is an increased need for referral of technology partnership opportunities or foreign research/development partnership (38 per cent, compared to 29 per cent in 2009), and perhaps marginally less evident need for help in locating financial/funding assistance (32 per cent, versus 37 per cent in 2009).

Figure 2.4

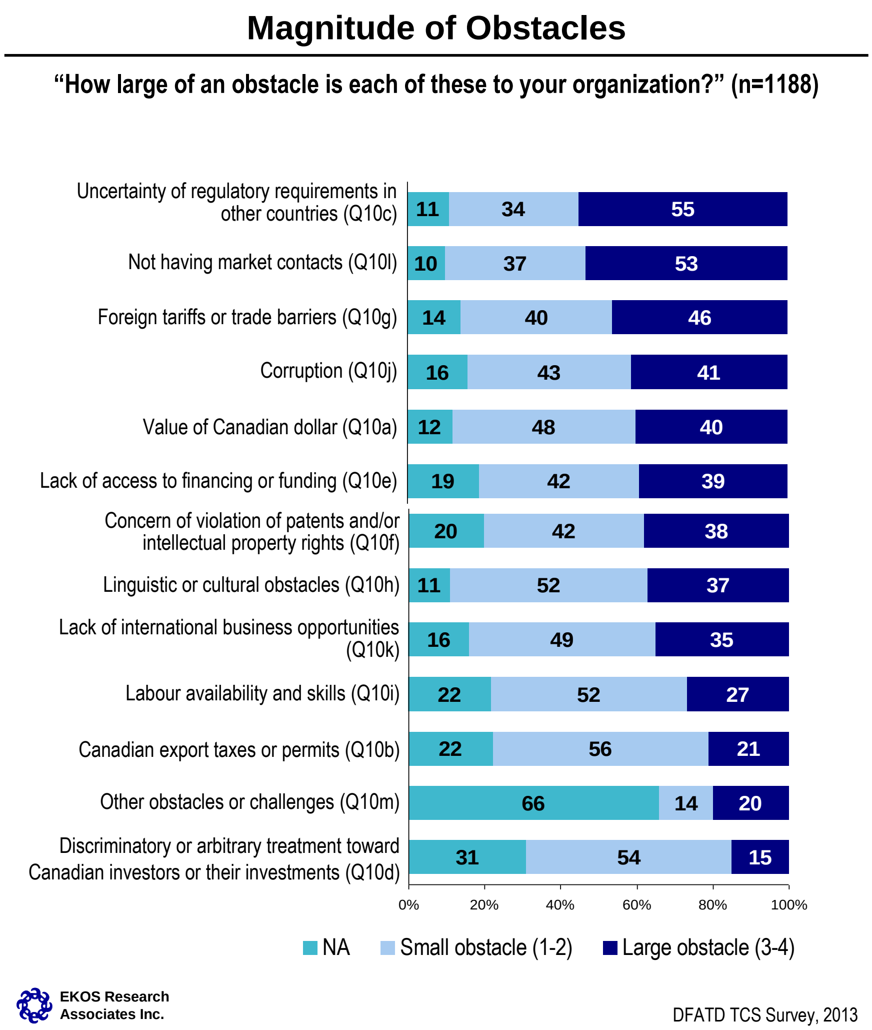


- The need for qualified contacts is greater for clients who were expanding their international business and smaller organizations.
- The need for market intelligence is higher for partner organizations and clients in Key Responsive / All Other Sectors. Clients who were expanding their international business and those with interest in Africa/Middle East and the Caribbean as top markets over the next three years are more likely than other organizations to need this type of service. This is also a greater need for clients with smaller revenues.
- The smallest organizations are more likely than larger organizations to have strong needs for information on export funding and or project financing and help locating funding. Organizations with smaller worldwide sales are also more likely than larger organizations to have a strong need for referrals to other relevant commercial programs and services or other third party service providers.
- Clients who expect to grow their markets in Africa/Middle East, and who accessed TCS services in this region are more likely to have a strong need for information on local organizations or companies.
- Need for referrals to financial and legal professionals is more acute among organizations that have accessed services over the last 18 months supporting their decision to invest as well as those who have not as yet conducted business internationally. The need is also somewhat more apt to be present among organizations accessing services in Latin America and the Caribbean.
- Intellectual property protection was more often cited as a need among organizations accessing services related to problem solving and among those who have not as yet conducted business internationally.
- It is interesting to note that of the 34 investment clients, 70 per cent of organizations accessing services at some point over the 18 months through the Invest Canada website identified a need for practical advice on timing and organizing of business trips, suggesting this site as a place where organizations might expect to find this type of information.
- Information on understanding responsible business practices including integration of corporate social responsibility principles into operations overseas is more often seen as a need among organizations expecting to move into African and Middle Eastern markets as well as those moving into the Caribbean and South America.

2.7 Reported Obstacles

According to more than half of TCS clients, the two greatest obstacles facing their organizations are the uncertainty of regulatory requirements in other countries (55 per cent), and not having contacts in their desired markets (53 per cent). Additionally, foreign tariffs or trade barriers are a large obstacle to 46 per cent of clients. More than one in three to roughly four in ten TCS clients face large obstacles presented by corruption (41 per cent), the value of the Canadian dollar (40 per cent), lack of access to financing (39 per cent), concern over intellectual property rights or violation of patents (38 per cent), linguistic or cultural obstacles (37 per cent), and lack of international business opportunities (35 per cent). Relatively more minor challenges are labour/skills availability (although reported to be a large obstacle to 27 per cent), Canadian export taxes or permits (21 per cent), and discriminatory or arbitrary treatment toward Canadian investors or their investments (15 per cent). One in three identified other obstacles, both large and small.

Figure 2.5



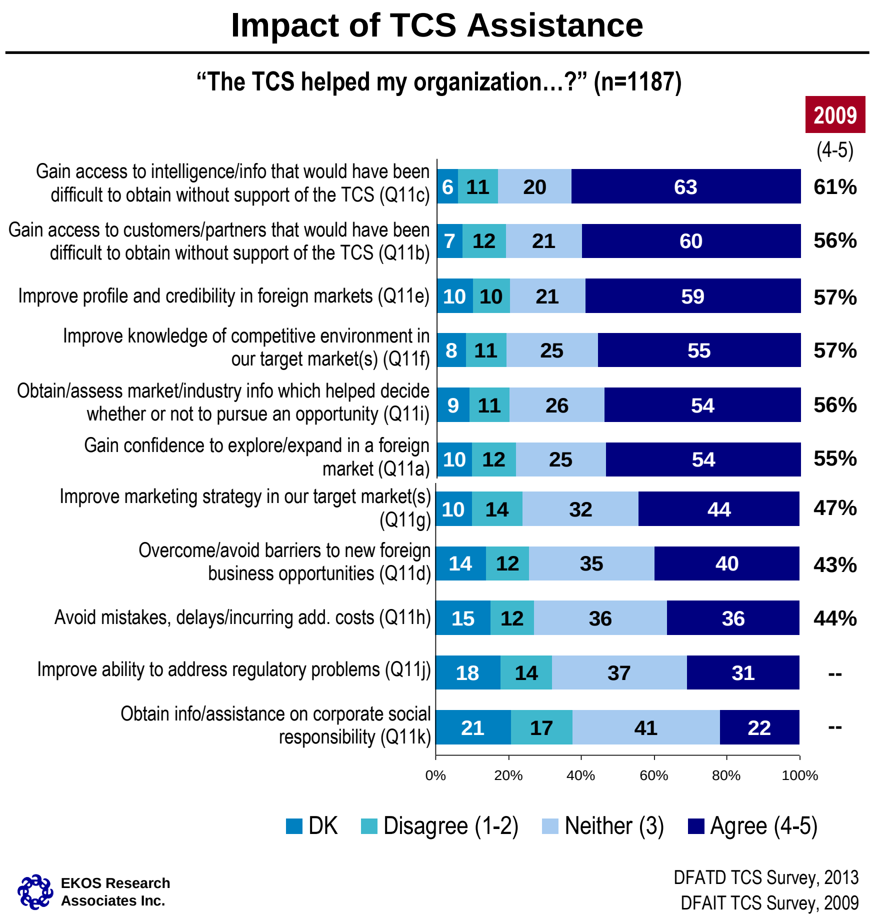
- Organizations expanding their international business are generally more likely than others to be concerned about many of these obstacles, particularly the top three (i.e., uncertainty of regulatory requirements in other countries, not having contacts in their desired markets and foreign tariffs or trade barriers).
- Not having market contacts is more of an obstacle for private sector clients accessing TCS services from Canada, clients who are looking to Mexico and the U.S.A. as top markets in the next three years, and small to medium-sized organizations.
- Foreign tariffs or trade barriers are more apt to be an obstacle to clients in Key Responsive and Other Sectors.
- Larger organizations are often concerned about uncertainty of regulatory requirements in other countries, corruption, discriminatory or arbitrary treatment toward Canadian investors or their investments, and the value of the Canadian dollar, relative to the proportion of smaller organizations noting these same obstacles.
- Smaller organizations and organizations doing business internationally for the first time are more likely than other clients to view access to funding, and concern of violation of patents/intellectual property as large obstacles. Smaller organizations are also more likely than larger organizations to be concerned about not having market contacts.

2.8 Impact of TCS Assistance

Slight majorities of TCS clients confirm that TCS assistance has had positive impacts by helping them gain access to intelligence that would otherwise have been difficult to obtain (63 per cent), gain access to customers/partners that would have otherwise been difficult to obtain (60 per cent), improve their profile and credibility in foreign markets (59 per cent), improve their knowledge of the competitive environment in target markets (55 per cent), obtain and assess market information to decide on whether to pursue an opportunity (54 per cent), and gain confidence to explore or expand in a foreign market (54 per cent). Overall, the proportion of TCS clients who have experienced these impacts is roughly the same as reported in 2009, as well as results found in the Continuous Client Survey (i.e., within four to five percentage points).

Impacts somewhat less apt to be reported include improving their marketing strategy in their target market (44 per cent), overcoming/avoiding barriers to new foreign business opportunities (40 per cent), and avoiding mistakes and delays (36 per cent). These impacts have been cited by about the same proportions of TCS clients as found in 2009, although fewer now report the avoidance of mistakes and delays (36 per cent versus 44 per cent in 2009, and 45 per cent in the Continuous Client Survey). Three in ten clients report that TCS assistance has improved their ability to address regulatory problems (31 per cent), and two in five say they have been able to obtain information on corporate social responsibility, with large proportions of clients not knowing or not feeling strongly one way or another whether TCS helped in these areas (note that these items were not tested in 2009).

Figure 2.6

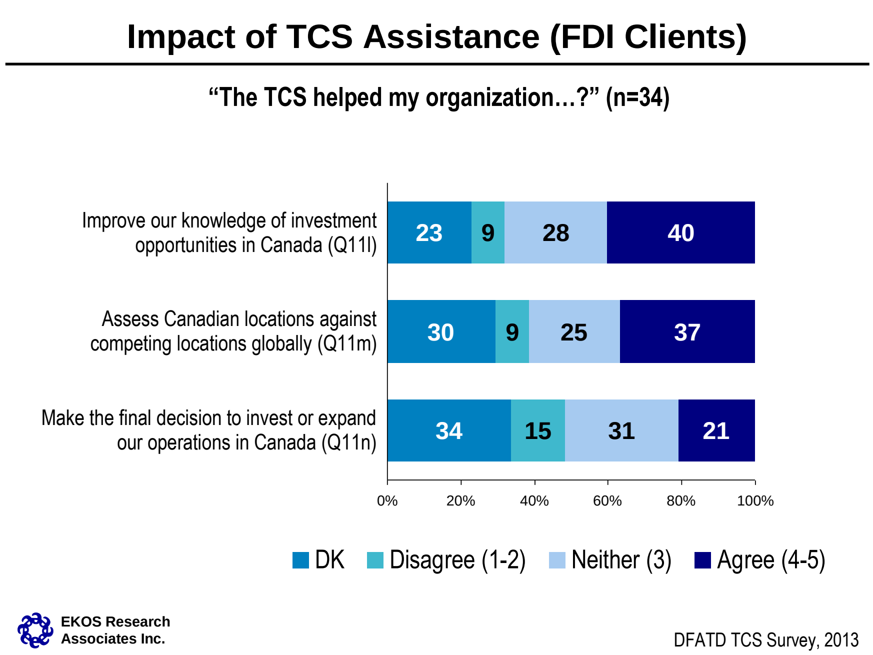


- Partners are more likely to say that the TCS helped them gain access to intelligence and information, improve their knowledge of the competitive environment in their target market(s), improve their marketing strategy, obtain and assess market or industry information to decide whether to pursue an opportunity. Along with Canadian Offices Abroad, partners are also more likely to say that TCS helped them improve their profile and credibility in foreign markets. Organizations with Canadian Offices Abroad are more likely to feel TCS helped them improve their ability to address regulatory problems or other non-tariff barriers encountered in their target market.
- Clients who were expanding their international business when they received TCS services are more likely to say that the TCS helped them gain confidence to explore or expand in foreign markets and to overcome barriers to new foreign business opportunities.

- Clients who expect Asia/Oceania and Europe to be among their top markets are more likely to say that the TCS helped them to overcome barriers to new foreign business opportunities.
- Clients who accessed TCS services in North America are more likely to feel that TCS helped them gain access to customers and partners that would have been otherwise difficult to obtain, and that the TCS helped improve their marketing strategy.

FDI clients were further asked to rate the assistance they received from the TCS in some investment-related areas. Roughly one in three to four in ten FDI clients agreed that the TCS helped their organization improve their knowledge of investment opportunities in Canada and/or assess Canadian locations against competing locations globally. One in five felt that the TCS helped their organization make the final decision to invest or expand their operations in Canada. Readers are cautioned that the sample of FDI clients is very small (n=34), and sizable numbers of respondents (one in five to one in three) were not able to provide a response for each of these measures.

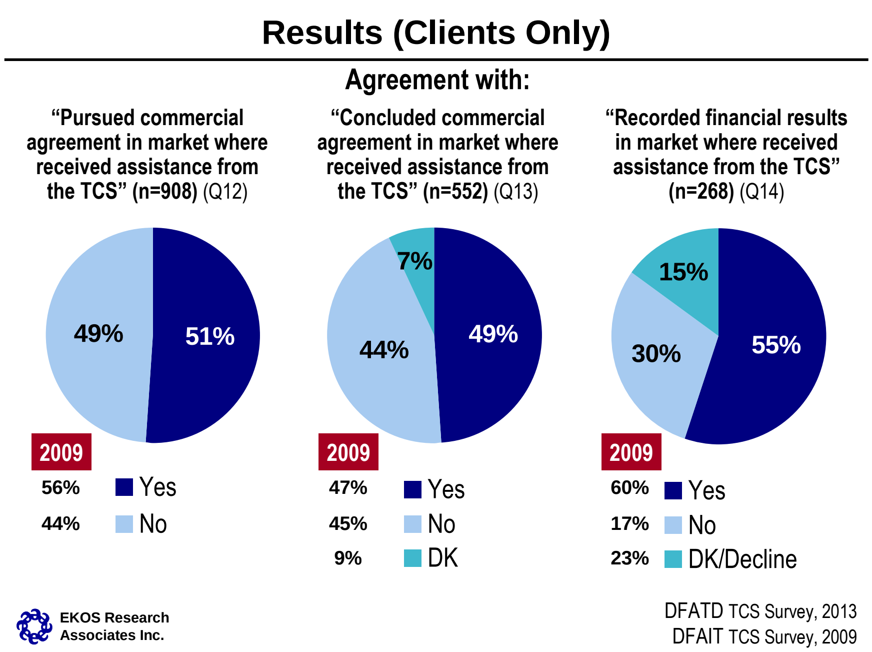
Figure 2.7



2.9 RESULTS

In order to assess the outcomes of having received services from the TCS, clients were first asked whether they had pursued commercial agreements, concluded commercial agreements, or recorded financial results in markets where they received assistance from the TCS since July 1, 2011. Half of clients say they pursued a commercial agreement (51 per cent)[13], which is in line with the 56 per cent recorded in 2009 and the 50 per cent found in the Continuous Client Survey. About half of these clients (49 per cent or 25 per cent overall) concluded this commercial agreement, consistent with the proportion who did so in 2009 (47 per cent). The incidence of recording financial results is just over half of clients who concluded a commercial agreement (55 per cent), which is in line with the 60 per cent recorded in 2009. Overall, excluding partner organizations, 16 per cent of clients recorded financial results in markets where they received assistance from the TCS.

Figure 2.8



- Clients expanding their international business, as well as medium-large organizations (i.e., those reporting $5 to $25 million in annual revenue) are more likely than other organizations to have pursued or entered into negotiations of a commercial agreement.

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13 Results exclude partner organizations (i.e., other public sector, not for profit organizations); based on 998 of 1222 clients responding to the survey.

- Incidence of concluding a commercial agreement is higher in Key Proactive Sectors, among small-sized organizations (i.e., those reporting 10 to 99 employees and those with small to medium revenues of $250,000 to $25 million).

Among the 16 per cent of clients indicating financial results, the main type of results were reported to be in the areas of exporting goods (65 per cent) and services (44 per cent), followed by partnership arrangements (29 per cent).

The magnitude of financial results reported is wide ranging. Eleven per cent of organizations with a financial result reported it to be under $25,000. One in four (23 per cent) recorded $25,000 to $100,000 in financial results. One in three (33 per cent) indicated $100,000 to $1 million in results, 19 per cent cited between $1 million and $5 million, and 13 per cent described $5 million to $50 million in results. Six per cent reported results in excess of $50 million.

Table 2.7: Area and Magnitude of Financial Results Recorded

	Total (n=146)
What type of financial results did you achieve? (Multiple response)	
Export of goods	65%
Export of services	44%
Partnership, joint venture or other alliance leading to revenue	29%
Investment abroad leading to revenue	11%
Licensing of technology	8%
Foreign affiliate sales	6%
Expansion of existing investment in Canada	4%
New direct investment in Canada	4%
Resumption or increase in sales after the pre-existing barrier to market access was removed	4%
Attracting angel investors or venture capital	2%
Other	4%
What was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.	
Less than $250,000	11%
$25,000 to less than $100,000	23%
$100,000 to less than $1 million	33%
$1 million to less than $5 million	19%
$5 million to less than $50 million	13%
$50 million or more	6%

- Financial results in the export of services are more often reported among clients in Key Proactive Sectors. Results are more often reported in the export of goods among organizations that are expanding their international activity.

Organizations that recorded a financial result were also asked about the extent to which the financial result had an impact on the size of the workforce in Canada. In six out of ten cases (62 per cent) there was no change reported. Only two per cent recorded a negative change in the workforce. Among the 36 per cent of cases where an increase in workforce was reported, the average increase was 15 per cent. The percentage increase was naturally largest among the smallest organizations.

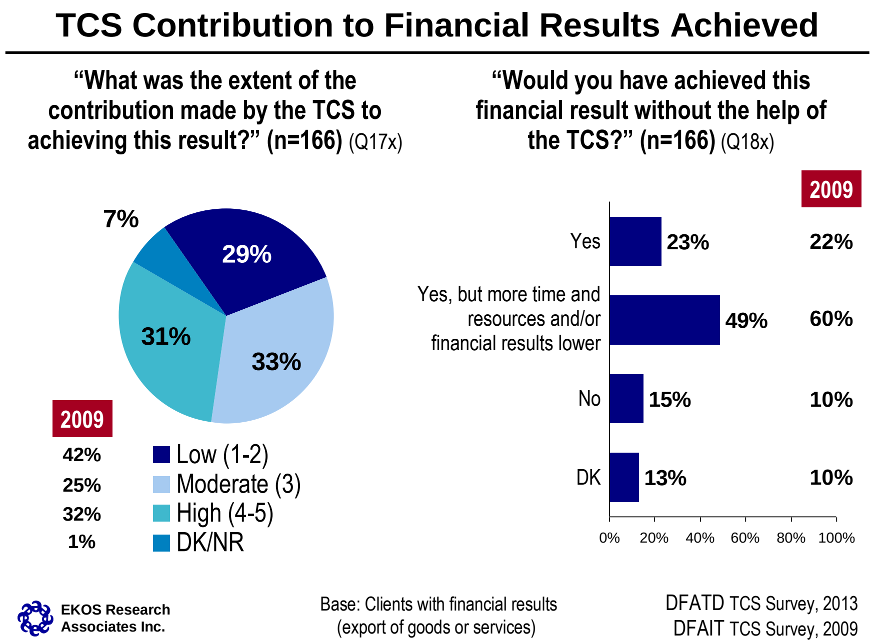
2.10 TCS Contribution to Financial Results Achieved

TCS clients who achieved financial results in the form of export of either goods or services were asked to rate the TCS's contribution in achieving this result. Nearly equal proportions say the TCS had a high (31 per cent), moderate (33 per cent), or low (29 per cent) contribution to this result. Although this question was asked in 2009, the wording was changed to make the question more straightforward[14]. In spite of this, results (31 per cent) are largely in line with 2009 results (32 per cent) when similar proportions of clients achieving financial results attributed a strong contribution to the TCS services received.

One-quarter of these clients indicate they would have achieved this result regardless of the assistance of the TCS (23 per cent). Two in three, however, attribute this outcome at least partially to the contribution of the TCS. Half (49 per cent) indicate their financial results would have been lower or their demand on resources higher if they had not had the help of the TCS, and a further 15 per cent say they would not have achieved this financial result at all without TCS assistance. These results are similar to those found in 2009.

[14] The 2013 question removed the rating "to at least some positive contribution" and changed the label of the fifth point on rating scale from "major contribution" to "essential contribution", making the 2013 question more stringent.

Figure 2.9

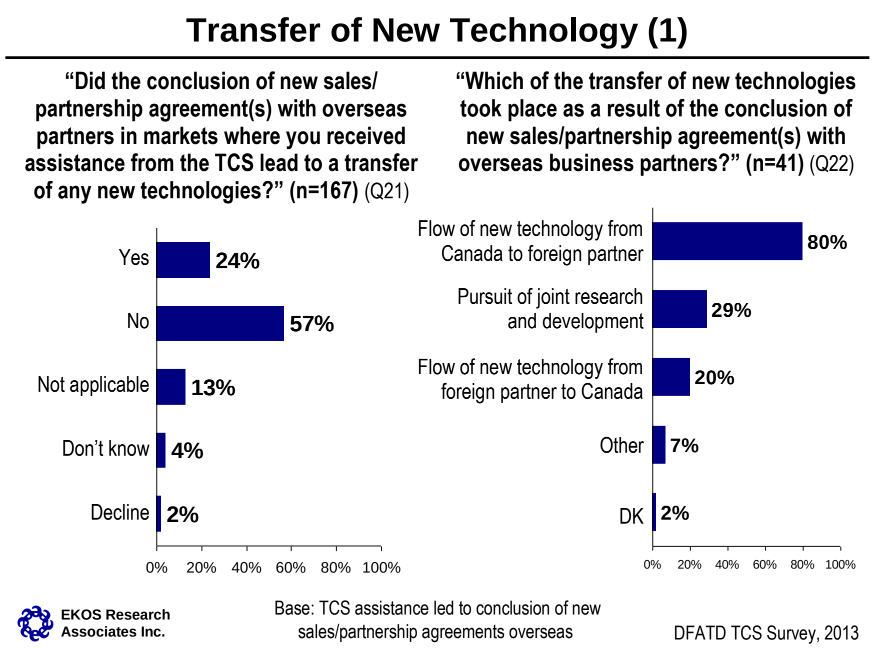


- The smallest organizations are marginally more likely to indicate a limited TCS contribution to their financial results. This is also the case among higher proportions of clients reporting that they accessed services to prepare for international markets, as well as those recording a financial result in the export of services.
- Organizations based in Quebec and small organizations with fewer than 10 employees are marginally more likely to indicate that their financial results would have been achieved even without the help of the TCS, relative to clients based elsewhere and larger organizations.

2.11 TRANSFER OF NEW TECHNOLOGY

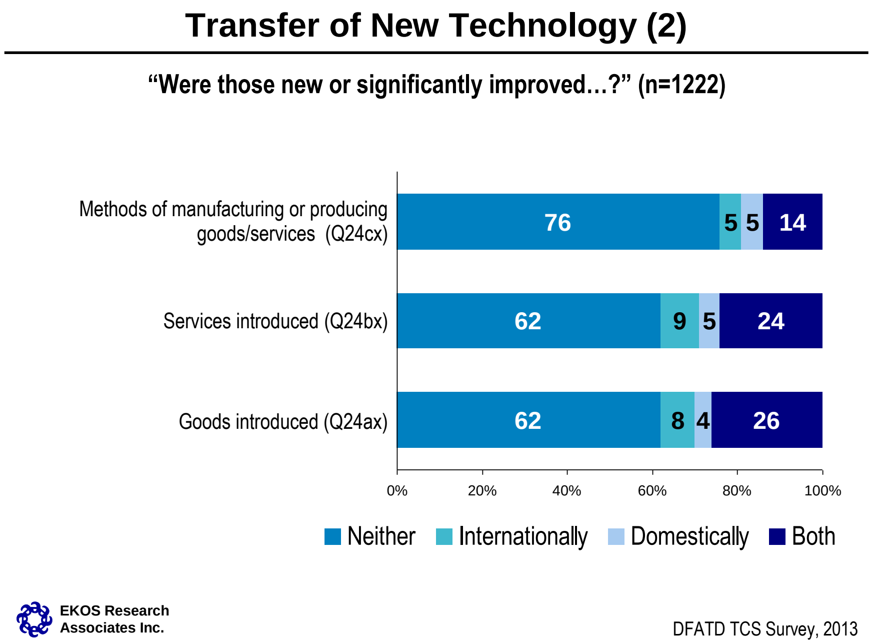
Among the TCS clients who reported that TCS assistance led to the conclusion of new sales and partnership agreement with overseas partners, one-quarter say that these new partnerships led to transfer of new technology (24 per cent). In the majority of cases the technology flowed from Canada to the foreign partner (80 per cent), although in one in five cases the technology flowed from the foreign partner to Canada (20 per cent). Three in ten say that joint research and development was pursued (29 per cent).

Figure 2.10



The assistance of the TCS led 14 per cent of all TCS clients to introduce new or significantly improved methods of manufacturing or producing goods/services to both domestic and international markets. A further ten per cent introduced these improvements/innovations to either a domestic market or an international one. One-quarter of TCS clients introduced new or significantly improved services to a domestic and international market; a further 14 per cent introduced new/improved services, but on either a domestic or an international scale. One-quarter of TCS clients introduced new or improved goods to both an international and a domestic audience, and a further 12 per cent introduced new/improved goods only domestically or only internationally. Looking at the pattern of technology transfer overall, roughly one in three to just under four in ten TCS clients said that they introduced or improved goods, services, or manufacturing/production processes on either a domestic or international scale, or both.

Figure 2.11



- Private sector organizations located in Canada and clients who accessed trade promotion services from the TCS, as well as those organizations whose most recent service was resolving problems, are more likely to have introduced new or improved goods both domestically and internationally. Clients who received services from a regional office, as well as those accessing the TCS website are more likely to have introduced new or improved goods or services both domestically and internationally.
- Clients in the Key Proactive Sector and clients who were already expanding their business abroad are more likely to have introduced new or improved goods and services both domestically and internationally.
- Mid-size companies are more likely to have introduced goods both domestically and abroad. The highest revenue clients are more likely to have introduced services and new/improved methods of manufacturing/production both domestically and internationally.
- Those most likely to have introduced new/improved methods of manufacturing/production both domestically and internationally are Canadian Offices Abroad and those who accessed services in North America.
- Organizations who are least likely to have introduced any new or improved goods/services or methods of manufacturing/production are partner organizations. Organizations with low revenue are least likely to have introduced new or improved goods. Clients in the Key

Responsive Sectors and those who received TCS services in Europe are least likely to have introduced new or improved services.

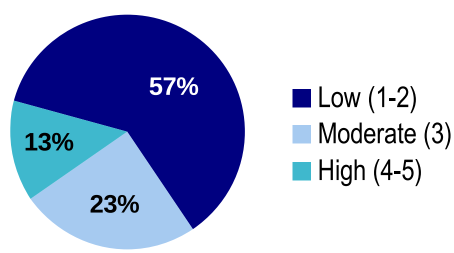
2.12 Impact of the TCS on Transfer of Technology

For the most part, the impact of the TCS on the transfer of technology was low to moderate. More than half (57 per cent) indicated the TCS services they received had a low impact on technology transfer, and 23 per cent said the impact was moderate. Just over one in ten TCS clients reported that TCS services had a strong impact on something they improved or introduced (13 per cent).

Figure 2.12

Impact of TCS on Transfer of Technology

"What was the extent of the contribution made by the services that your organization received from the Trade Commissioner Service to the new or significantly improved goods/service or methods of manufacturing/production introduced?" (n=751) (Q25)



EKOS Research Associates Inc.

DFATD TCS Survey, 2013

- Clients based in Ontario and partner organizations are more likely than others to have felt the TCS contribution to their technology transfer was high.
- Clients that most recently accessed services to help prepare them for international markets are more likely to have said the TCS had a high impact on their technology, compared to those who recently accessed other services. Clients who accessed TCS's Innovation and Science and Technology line of services are also more likely to attribute a high contribution to the TCS.
- The smallest organizations (<10 employees) are more likely to say the TCS contributed greatly to their technology transfer.

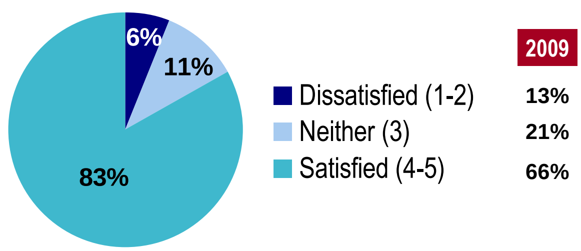
2.13 Overall Satisfaction with TCS Services

Beyond satisfaction with specific aspects of the most recent services received (see Section 2.4) clients were also asked about overall satisfaction with the services and advice they have received from the TCS during the 18 month period. More than eight in ten (83 per cent) rated themselves as satisfied or very satisfied, which is consistent with the results from the Continuous Client Survey, but a considerable increase from the 66 per cent recorded in the 2009 Comprehensive Client Survey. Only six per cent indicated dissatisfaction, compared with 13 per cent in 2009.

Figure 2.13

Overall Satisfaction with TCS Services

"How would you rate your overall satisfaction with the service and advice provided by the TCS across all of your interactions with the Trade Commissioner Service (TCS) since July 1, 2011?" (n=1222) (Q27)



EKOS Research Associates Inc.

DFATD TCS Survey, 2013
DFAIT TCS Survey, 2009

- The largest organizations are the most satisfied, as are clients in the Ongoing Proactive Sectors. Similarly, organizations assisted with problem resolution and support in the decision to invest are more apt to be satisfied, and these are typically larger organizations drawing on these services.
- Proportionately few clients receiving TCS services in Canada register satisfaction. This may be related to smaller organizations being more likely to draw on TCS services in Canada, given that smaller organizations are generally less satisfied.

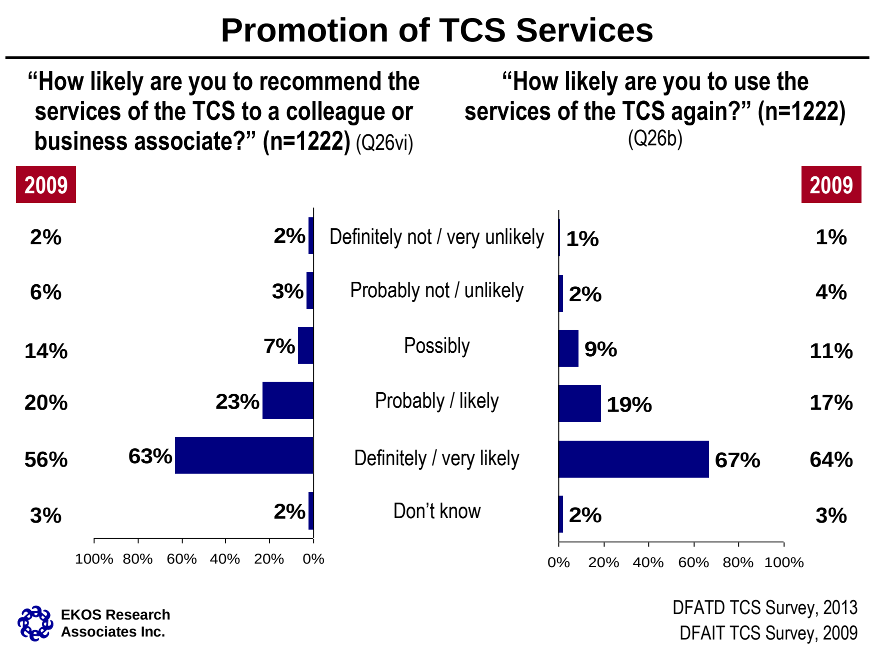
Table 2.8: Variation in Satisfaction

	n=	Dissatisfied (1-2)	Satisfied (4-5)
Total 2013	*1222*	6%	83%
Total 2009	*1449*	13%	66%
How would you rate your overall satisfaction with the service and advice provided by the TCS across all of your interactions with the Trade Commissioner Service (TCS) since July 1, 2011?			
Where services were received from TCS			
Abroad	*748*	6%	83%
In Canada	*92*	11%	69%
Both	*357*	6%	84%
Type of services received			
Preparation for international markets	*753*	5%	84%
Assess your potential	*385*	4%	87%
Finding qualified contacts	*848*	5%	85%
Resolving problems	*363*	5%	89%
Supporting decision to invest	*130*	2%	94%
Other	*141*	5%	80%
Sectors identified in TRIO			
Key Proactive	*592*	6%	82%
Ongoing Proactive	*180*	5%	88%
Key Responsive Sectors / Others	*450*	6%	81%
Number of employees			
Fewer than 10	*326*	9%	80%
10 - 49	*322*	8%	81%
50 - 99	*98*	4%	85%
100 - 499	*204*	4%	82%
500 or more	*224*	2%	90%

2.14 PROMOTION OF TCS SERVICES

Two in three TCS clients say that they would definitely use TCS services again (67 per cent) and/or recommend the TCS to others (63 per cent). Adding in those who said that this would likely or probably be the case, the proportion rises to 86 per cent in each case. Very few clients would not use TCS services again (three per cent) or recommend TCS services to others (five per cent). Another nine and seven per cent respectively see this as a possibility although they would not commit to it.

Figure 2.14



- Those most likely to say they would use the TCS services again are organizations that are expanding and the largest organizations, reporting more than 500 employees and/or $25 million in revenues worldwide.

Using only the half of client responses in the survey where the question about referral was placed on a ten point scale, 12 per cent of TCS clients can be seen as "Detractors" (i.e., provided a rating of only one to six on the ten point scale) and have a higher likelihood of saying something that could be damaging to the TCS reputation or brand[15]. Sixty-two per cent provided a nine or a ten on the ten point scale and are considered to be "Promoters": loyalists and general enthusiasts who buy and use services and refer others, who are likely to say something that would be positive for the TCS brand. Subtracting one from the other, the Net Promoter Score is 50 (taking rounding into account).

Table 2.9: Net Promoter Score

	Total (n=594)
Total	**50**
Location of company	
Atlantic	47
Quebec	55
Ontario	52
Prairies and Territories	**34**
British Columbia	51
Business line	
Canadian Direct Investment Abroad (CDIA) and Corporate Social Responsibility (CSR)	59
FDI Attraction	**67**
Innovation / Science and Technology	**67**
Trade Policy / Market Access	48
Trade Promotion	47
Sector identified in TRIO	
Key Proactive	52
Ongoing Proactive	56
Key Responsive Sectors / Other	47
Type of services received	
Preparation for international markets	54
Assess your potential	**67**
Finding qualified contacts	57
Resolving problems	**66**
Supporting decision to invest	**73**
Other	48
How services received	
Office abroad	52
TCS regional office in Canada	52
TCS website	46

[15] The Net Promoter Score was developed by Satmetrix, Bain & Company and Fred Reichheld in 2003 and is used to measure the customer experience. http://www.netpromoter.com

	Total (n=594)
Invest Canada website	**80**
Based on success	
Concluded agreement	68
Did not conclude agreement	44
Where service received (TCS office)	
Africa and Middle East	**34**
Asia-Pacific	56
Europe	56
Latin America and Caribbean	46
North America (U.S.A and Mexico)	51
TCS regional office in Canada	40
Number of employees	
Fewer than 10	47
10-49	45
50-99	46
100-499	55
500 or more	65
Worldwide sales	
Less than $250,000	49
$250,000 to less than $5 million	38
$5 million to less than $25 million	41
$25 million or more	64

- Organizations with head offices located in the Prairies have the lowest Net Promoter Score (34), as do organizations that obtained service in the Africa and Middle East regions.
- The Net Promoter Score is highest among the largest organizations, those drawing on services from Foreign Direct Investment attraction (and using the Invest Canada website) and Innovation / Science and Technology. This is also the case with organizations reporting that they have received services that assisted with assessing potential, problem solving and supporting their decision to invest and those that concluded agreements in the 18 month survey period.

2.15 Relative Satisfaction (TCS vs. Other Trade Promotion Organizations)

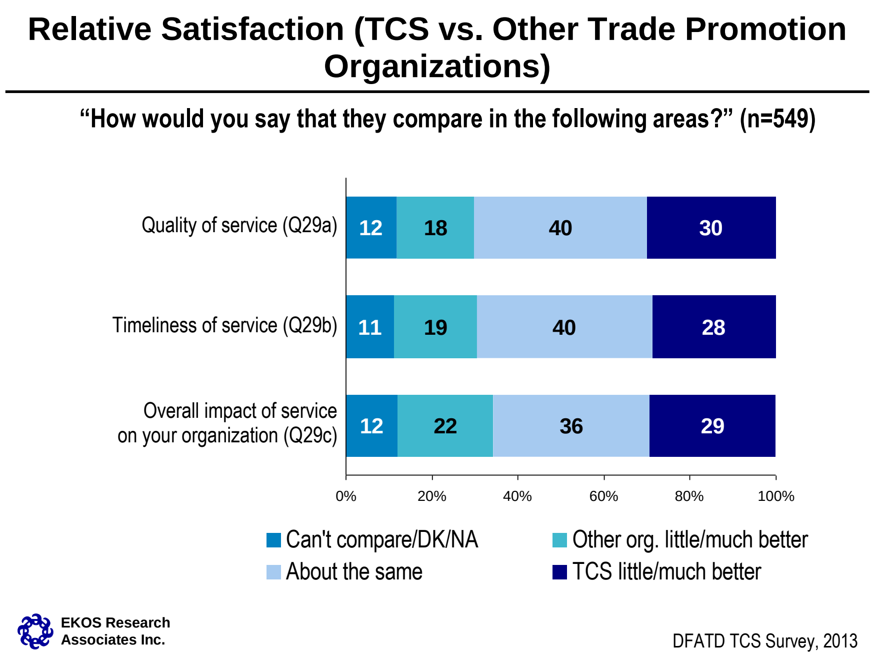
In order to assess satisfaction with TCS services and the services of other Canadian organizations from which they have received trade promotion services, clients were first asked if they have, in fact, used other services within the 18-month period under study. Almost half (45 per cent) indicated that they had, although almost one in five were unsure. Organizations located in the Atlantic and the Prairies, partner organizations, and medium-sized organizations (with 100 to 499 employees, and/or reporting revenues of $250,000 to $5M) are more likely to have used the services of other organizations.

Table 2.10: Profile of Organizations Using Other Trade Promotion Services

	Total YES (n=1222)
Has your organization received a service from another Canadian trade promotion organization or a provincial, territorial or municipal organization involved in economic development between July 1, 2011 and December 31, 2012?	
Total	**45%**
Location of company	
Atlantic	65%
Quebec	50%
Ontario	37%
Prairies and Territories	54%
British Columbia	44%
Organization type	
Canadian	44%
Partner	52%
Canadian Offices Abroad	35%
Number of employees	
Fewer than 10	41%
10-49	52%
50-99	58%
100-499	44%
500 or more	37%

Comparing TCS services with those received by other trade promotion organizations, roughly three in ten rated the TCS as slightly or considerably better than other services received, keeping in mind that the survey did not ask about the name of the services/program accessed or the type of organization providing the service(s). This is compared with roughly one in five rating the other services as comparatively better than TCS services. Overall, 30 per cent rated the TCS as better compared with 18 per cent saying that the other services were better, representing a 67 per cent better rating for TCS services. Results are similar, if marginally more muted, with regard to timeliness and overall impact on the organization.

Figure 2.15



- Results are marginally more positive among the largest organizations with 500 or more employees, with 40 per cent providing a more positive rating for TCS services with regard to quality of service. Those that are currently expanding, however, are marginally more apt than other organizations to rate the other services as better, although a slightly higher proportion of them lean toward the TCS having the more positive quality of service (31 per cent compared with 23 per cent saying that the other services are of higher quality).
- Organizations located in the Atlantic, as well as partner organizations are somewhat more likely than other clients to rate the other services more positive in terms of timeliness.
- The overall impact on the organization is rated most positive in terms of TCS service among organizations located in British Columbia, Canadian Offices Abroad, those reporting that they received assistance with assessing their potential and deciding whether or not to invest and the largest organizations with 500 or more employees.

3. CONCLUSIONS AND CONSIDERATIONS

Client profile

In terms of organization profile of the TCS client base, just over half of clients are small businesses, while one in four are medium-sized organizations, and just over one in six are large organizations. Most are private sector businesses based in Canada that accessed TCS services from abroad or within Canada. One in six are public or not for profit sector partners, including provincial governments, schools, or associations, and one in ten are Canadian business subsidiaries based in another country known as Canadian Offices Abroad (COAs).

Most TCS clients have been doing business internationally prior to accessing the TCS. Almost all TCS clients have previously received services through an embassy, high commission, consulate or trade office located outside of Canada. The majority accessed TCS services under the trade promotion business line. The services that clients most often say they have received from the TCS are assistance with finding contacts and preparation for international markets, indicating that the perceived services received are considerably different than the actual services received according to administrative information.

TCS approach

The 2013 survey compared TCS performance to other federal and provincial international business promotion organizations. The positive results and increased satisfaction could suggest that the change in approaches and practices including the Global Commerce Strategy, sector practices and the Integrative Trade Model, may have had a positive impact on client service. Clients who accessed TCS's Innovation and Science and Technology services also attributed a high degree of contribution to TCS services which may suggest a positive impact from the change in approach to service delivery.

Difference in perceived services received relative to administrative data base

This survey noted a pronounced difference between those services which clients reported having received and the actual services recorded in the administrative data. This disconnect could be the result of a number of factors. Due to the long data collection timeframe, this is likely partly a result of clients' recollection of their service experience, particularly if they received more than one service type. The discrepancy in the service received could also be a result of poor clarity on the part of the TCS in identifying its services to clients and how they match with client needs, or it may indicate that clients do not recognize the services in the same way that the TCS identifies them, and may see broad areas of overlap between the service offerings. This disconnect could also be related to the accuracy of administrative record-keeping. It is also possible that TCS staff is not accurately coding the service provided to clients (e.g., differences in how staff interpret and categorize individual services, particularly in different locations). Whatever the reason for the disconnect, there is a pressing need to explore this issue further in order to increase the accuracy of feedback related to service needs and experiences.

High levels of client satisfaction

Overall satisfaction with TCS services received over the 18 months under study is very high at 83 per cent, which is consistent with results obtained 60 days after service delivery in the Continuous Client Survey. Satisfaction increased significantly from 2009 when it was 66 per cent in the Comprehensive Client Survey. In fact, only 6 per cent of clients in 2013 reported dissatisfaction with TCS services. The most satisfied are large organizations, with 500 or more employees worldwide, as well as those receiving support to their decision to invest and those requiring assistance to resolve a particular problem, where nine in ten recorded satisfaction.

The survey recorded similarly high levels of satisfaction with specific aspects of the services clients received, ranging from 75 to 85 per cent depending on the particular aspect of service (e.g., highest for receiving helpful/useful information that allows for organizations to address specific problems and marginally lower for wait times and appropriate referrals). In most areas the increase in satisfaction over time was again significant (five to ten per cent). Again, it was the largest organizations and those receiving services abroad that recorded the highest levels of satisfaction.

The survey also captured a high degree of propensity to promote the TCS for future use. For example, almost nine in ten indicated that they would definitely use the TCS again and a similarly high proportion said that they would recommend the service to others. A Net Promoter Score of 50 suggests that TCS services have a good reputation which is likely to be described positively to others needing similar services. In comparing the TCS with those services offered by other Canadian trade promotion organizations, the TCS comes out ahead 50 per cent of the time or more often.

Systematically lower satisfaction reported by the smallest organizations

Small- and medium-size organizations constitute 78% of TCS clients. Although the survey only recorded limited dissatisfaction among TCS clients across all segments, it is the smallest organizations, with fewer than 10 employees (25%), and those accessing the services from regional offices in Canada where one in ten indicated that they were dissatisfied. This segment seems to be largely made up of small organizations that are first time exporters, looking for international market preparation and qualified contacts. They are somewhat less satisfied with the ability of staff to understand the dynamics of their business, and are not as satisfied with response time. In fact, a few complained that they did not receive a response to their request or did not receive appropriate follow-up. For this segment, the TCS was not seen as helpful, particularly in the areas of gaining access to new clients or partners and improving their market strategy or intelligence.

We recommend that additional in-depth and qualitative research be undertaken to better understand the nature of the issues and sources of dissatisfaction. If the dissatisfaction stems, for example, from organizations requesting services which are beyond the mandate of the TCS, perhaps more can be done to quickly identify this type of organization/request, and appropriate referrals made to other organizations. Where organizations are attempting to access services from access points that are not well equipped to provide the type of consultation/service required, more immediate identification could potentially be made, with referral to other access points better equipped to handle their requests. If this segment of "clients" is not TCS clients at this point in time, it may be advisable to examine these results further in order to more accurately see the results for "clients" and "others". Similarly, a closer look at the profile of those requesting services outside of the scope of the TCS may provide useful information with which to determine if these organizations may be future clients and whether or not TCS services should potentially be reviewed. A more in-depth understanding of the source of dissatisfaction and how best to re-direct or clearly communicate with organizations should lead to implications for additional communications about the services offered by the TCS, additional steps in preparing TCS staff to deal with these requests and, ultimately, reduce dissatisfaction.

Financial impact on client organizations

Survey results indicate that more than half of TCS clients have experienced an increase in access to and understanding of the foreign markets they are interested in, as was also recorded in 2009. They have also improved their profile and credibility in these markets. This has resulted in increased confidence to be able to explore or expand into new international markets. Fewer, however, have said that the TCS has assisted them in overcoming barriers or avoiding mistakes, delays or added costs – in part because respondents were not always able to tell if TCS assistance has had this impact.

Overall, 16 per cent of TCS clients recorded financial results, of which one in three attribute a strong role to the TCS and another one in three say that the TCS played a moderate role in their achievements. Similarly, two in three said that they would not have achieved the same results without at least some additional impact to their bottom line. As with overall satisfaction, smaller organizations are least likely to attribute financial results to the assistance of the TCS, as are organizations in Quebec.

Beyond financial results, one in three recorded workforce expansion, in the order of roughly 15 per cent. One in four client organizations said that the conclusion of their sales agreement with overseas partners where they received TCS assistance led to a transfer of new technologies, largely flowing to the foreign country.

Overall, survey results indicate that the TCS has a strong positive impact on its clients' access to and understanding of the foreign markets, their confidence to act, their financial bottom line, and their transfer of new technologies to other countries and workforce expansion.

Needs, challenges and future markets

The primary areas identified by the survey for assistance are in obtaining qualified contacts, gathering information about local organizations/companies, and general market intelligence, which is also consistent with 2009 results, although in 2013 there is an increased need for referral of technology partnership opportunities or foreign research/development partnership. Two other areas of need relate to supporting clients in protecting their intellectual property rights, procurement, and regulatory matters, and helping clients understand responsible business practices.

The two greatest obstacles facing client organizations are the uncertainty of regulatory requirements in other countries, and not having contacts in their desired markets. Availability of labour, Canadian export taxes or permits, and discriminatory or arbitrary treatment toward Canadian investors or their investments are not seen as significant obstacles by large proportions of TCS clients.

About half of TCS clients expect that their organization's top region in terms of growth, obstacles or opportunities over the next three years will be the U.S.A., which has increased significantly from 2009. This is followed closely by SouthSoutheast Asia, and the European Union's EU27 countries. Anticipated growth into Africa or the Middle East has also increased substantially relative to 2009, as is the case with expected expansion into South America and Mexico. Results in 2013 show an even more diversified expansion into new markets than was highlighted in 2009, suggesting the need to expand TCS resources, intelligence and networks to line up with ever increasing and diverse demand from Canadian clients.

Considerations for future client surveys

Some considerations for future client surveys include:

- Identify a sample of client population that will be representative of the entire client population and ensure that the sample of client respondents has a statistical significance. This will provide a reliable set of responses, repeatable year over year, and ensure that the client survey results can be extrapolated to the entire client population.
- Designing a considerably shorter survey (less than 15 minutes) in order to reduce response burden and increase response rate. This will require prioritizing certain information and considering other ways that some information may be collected (e.g., through administrative data). Revising survey objectives and redesigning content would curtail trend analysis.
- Timing of conducting the survey. The survey should be conducted within a sufficient and specified period of time to enable respondents to report on impacts (e.g., agreements and financial outcome) but not as long a period as 18 to 24 months. Shortening the data collection timeframe may require a more continuous approach to data collection, with analysis conducted during specified periods (e.g., once per year). A shorter timeframe on which clients are asked to reflect means they are likely to recall the service received more clearly and would increase

the likelihood that the client representative who received the service is still available. This approach will increase both response rate and data quality.

- Devising a strategy to explore or test the mismatch between the type of services clients say they received and what the administrative data indicates. The objective would be to bring these two closer in line and improve the accuracy of the survey findings for program areas in tracking perceptions of the interaction and associated outcomes.

- Defining and possibly segmenting organizations according to whether they received a TCS service (i.e., clients) or simply made contact with the TCS but did not receive a service (i.e., where the request was determined to be outside of the scope and mandate of the TCS). This segmentation would provide a clearer picture of the experiences and requirements of “clients”, as well as a deeper understanding of organizations requesting services from the TCS which fall outside their mandate. In particular, this may allow for deeper probing of the types of services being requested and whether more can be done in preparing TCS staff to provide useful recommendations for next steps or at least satisfying explanations for not being able to fulfill requests. It may also provide a better understanding of where these organizations sit on a continuum of preparedness for international trade and whether or not they are likely to become TCS clients in the near future.

- The current report could not extrapolate from survey responses an actual dollar figure of organizations’ financial impact that can be attributed to TCS services. Although this was done in 2009, it was likely based on a need identified at the analytical stage of the survey rather than at the design phase. If this is a key objective for future surveys, one or two specific questions concerning attribution of financial impact to TCS services could be considered, however, voluntary participation in an opinion survey and the response rate limit the collection of financial information.

APPENDIX A:
TECHNICAL REPORT

Response Rate Calculation Table

The 2013 client survey involved an online (email-Web) data collection methodology. Respondents were given a 1-800 number to call and an e-mail address for support. All communications including email invitations and reminders were sent by the Trade Commissioner Service (TCS) to ensure handling of client information in accordance with privacy regulations and public opinion research guidelines. The questionnaire was provided to clients in both official languages to allow clients the option of completing the questionnaire in the language of their preference.

The target population was identified from among all clients who received a service from the TCS between July 1, 2011 and December 31, 2012. According to the client management system (TRIO-1), a service request was closed for 17,370 clients during this time period. Some clients could not be reached due to incomplete email addresses or invitations sent by mistake, totalling 115. The survey questionnaire was sent to 17,255 clients on April 17th and 18th of 2013.

During the field period, two reminder email messages were sent to clients who had not completed the survey at the time: first reminder on April 24th, and second on May 8th. There were 1,094 respondents that were unavailable, refused to fill out the survey, or started the survey but never finished it. Others never answered the invitation. Finally, a total of 1,222 clients completed the survey (1,133 English, 89 French). Characteristics of the final set of respondents closely matched the total population with regard to location, sector and services received. The response rate for this survey was 7 per cent, which was calculated in accordance with the Response Rate Formula[16] identified by Public Works and Government Services Canada (PWGSC).

[16] Response rate calculation has been changed in 2013 to include "bounce back" emails within the total number of cases used to calculate the response rate. In this survey the response rate was decreased by 1 per cent after including these responses.

Total online cases used			17,255
Invalid cases			115
	Invitations mistakenly sent to people who did not qualify for the study	16	
	Incomplete or missing email addresses	99	
Unresolved (U)			14,939
	Email invitations bounce back	1,845	
	Email invitations unanswered	13,094	
In-scope non-responding units (IS)			1,094
	Non-response from eligible respondents (who said they did not receive service)	247	
	Respondent refusals	23	
	Language problem	0	
	Selected respondent not available (illness; leave of absence; vacation; other)	67	
	Early break-offs (incomplete responses)	757	
Responding units (R)			1,222
	Completed surveys disqualified - quota filled	0	
	Completed surveys disqualified for other reasons	0	
	Completed interviews	1,222	
Participation Rate/Response Rate = R/(U+IS+R)			7%

Tableau du calcul du taux de réponse

Le sondage de 2013 auprès des clients reposait sur une méthode de collecte des données en ligne (courriel et site Web). Les répondants disposaient d'un numéro 1-800 à composer au besoin et d'une adresse électronique. Toutes les communications, y compris les courriels d'invitation et de rappel, ont été envoyées par le Service des délégués commerciaux (SDC) pour s'assurer que les coordonnées des clients soient traitées conformément à la réglementation en matière de protection des renseignements personnels et aux lignes de conduite de la recherche sur l'opinion publique. Le questionnaire a été transmis aux clients dans les deux langues officielles pour qu'ils aient la possibilité d'y répondre dans la langue de leur choix.

La population cible a été établie comme étant l'ensemble des clients qui ont reçu un service du SDC entre le 1er juillet 2011 et le 31 décembre 2012. D'après le système de gestion des clients (TRIO-1), il y a eu fermeture d'une demande de service pour 17 370 clients au cours de cette période. Des clients n'ont pu être rejoints à cause d'une adresse électronique incomplète ou d'invitations envoyées par erreur, soit 115 au total. Le questionnaire du sondage a été envoyé à 17 255 clients les 17 et 18 avril 2013.

Au cours du travail sur le terrain, deux courriels de rappel ont été adressés aux clients qui n'avaient pas encore répondu au sondage : le premier rappel, le 24 avril, et le second, le 8 mai. Il y a eu 1 094 répondants qui n'étaient pas disponibles, ont refusé de répondre au sondage ou ont commencé à y répondre mais ne l'ont pas terminé. D'autres n'ont jamais répondu à l'invitation. Finalement, 1 222 clients en tout ont rempli le sondage (1 133 en anglais, 89 en français). Les caractéristiques de l'ensemble définitif de répondants correspondent étroitement à la population globale du point de vue du lieu, du secteur et des services obtenus. Le taux de réponse au présent sondage a été de 7 %, calculé selon la formule du taux de réponse[17] définie par Travaux publics et Services gouvernementaux Canada (TPSGC).

[17] Le calcul du taux de réponse a été modifié en 2013 de manière à inclure les courriels qui ont rebondi dans le nombre global de cas devant servir au calcul du taux de réponse. Dans le présent sondage, le taux de réponse a été abaissé de 1 % après l'inclusion de ces réponses.

Total des cas en ligne utilisés			17 255
Cas non valides			115
	Invitations envoyées par erreur à des personnes qui ne se qualifiaient pas pour l'étude	16	
	Adresses de courrier électronique incomplètes ou manquantes	99	
Non résolus (NR)			14 939
	Courriels d'invitation ayant rebondi	1 845	
	Courriels d'invitation demeurés sans réponse	13 094	
Unités admissibles non répondantes (UA)			1 094
	Non-réponse de répondants admissibles (qui ont dit ne pas avoir reçu de service)	247	
	Refus du répondant	23	
	Problème de langue	0	
	Répondants admissibles non disponibles (maladie; congé; vacances; autres)	67	
	Interruptions prématurées (réponses incomplètes)	757	
Unités répondantes (UR)			1 222
	Sondages terminés mais déclarés inadmissibles – quotas atteints	0	
	Sondages terminés mais déclarés inadmissibles pour d'autres raisons	0	
	Sondages terminés	1 222	
Taux de participation / Taux de réponse = UR/(NR+UA+UR)			7%

APPENDIX B
SURVEY QUESTIONNAIRE

INTRO

The Canadian Trade Commissioner Service (TCS) of the Department of Foreign Affairs and International Trade is conducting this survey to evaluate the quality of service provided, as well as assess the level of satisfaction of its clients with the services it offers. The survey is also designed to establish the service needs and expectations of clients, as well as the results achieved by its clients. The public opinion research firm, EKOS Research Associates, has been commissioned by Foreign Affairs and International Trade Canada to conduct the survey as an independent third party.

Your participation is voluntary and your decision on whether or not to participate will not affect any dealings you may have with the Government of Canada. By answering these questions, you will help the government improve the service it provides to clients.

Survey responses are completely confidential and will be reported in aggregate form only. The information you provide will be used for research purposes only and will be administered in accordance with the applicable privacy laws. Once responses have been tabulated, you will be able to review the aggregate results of the survey at the following website, likely in the summer of 2013: www.tradecommissioner.gc.ca/clientsurvey2013.

The TCS evaluates some attributes of service delivery and standards on a continuous basis using a short after service online client survey. The current, more comprehensive survey is intended to complement those findings.

This survey should take approximately 15-20 minutes to complete.

For those individuals who have started to respond but have not yet completed the survey, please note that your link remains active. All that you need to do is return to the above link and select "click here to continue". This will take you directly to where you left off.

Q1

Have you ever received a service offered by the Trade Commissioner Service (TCS) through:

SELECT ALL THAT APPLY

An embassy, high commission, consulate or trade office located outside of Canada 1
A TCS regional office (located in one of Canada's provinces) 2
The Trade Commissioner Service website (http://www.tradecommissioner.gc.ca/) 3
The Invest in Canada website (http://investincanada.gc.ca/) 4
Do not recall receiving a TCS service .... 9 X ->THNK2

Q2

Which of the following services offered by the TCS did you receive between July 1, 2011 and December 31, 2012?

SELECT ALL THAT APPLY

Preparing you for international markets through the provision of advice and information as you pursue commercial opportunities in a market, including the recommendations of trade fairs and trade missions to attend. 1
Assessing your potential in a target market through the provision of market intelligence and information, as well as advice on improving your market strategy 2
Finding qualified contacts in your target market such as potential buyers and partners, professionals in financial and legal institutions, technology sources, agents, etc. Referring you to technology partnership opportunities or foreign research and development partnership opportunities 3
Resolving problems such as advising on market access problems, local regulations and technical standards and other business challenges including: customs clearance and shipping, unfair business treatment, overdue accounts receivable, etc. 4
Supporting your decision to invest or expand your operations in Canada through the provision of: information on Canada's business environment; sector-specific intelligence; pathfinding to key government contacts; referrals to investment professionals; and facilitation of site visits 5
Other (SPECIFY) 77
Have never received any of the above .... 99 X ->THNK2

Q2B

Which of these services was the most recent service that you received?

Preparing you for international markets through the provision of advice and information as you pursue commercial opportunities in a market, including the recommendations of trade fairs and trade missions to attend. 1
Assessing your potential in a target market through the provision of market intelligence and information, as well as advice on improving your market strategy 2
Finding qualified contacts in your target market such as potential buyers and partners, professionals in financial and legal institutions, technology sources, agents, etc. Referring you to technology partnership opportunities or foreign research and development partnership opportunities 3
Resolving problems such as advising on market access problems, local regulations and technical standards and other business challenges including: customs clearance and shipping, unfair business treatment, overdue accounts receivable, etc. 4
Supporting your decision to invest or expand your operations in Canada through the provision of: information on Canada's business environment; sector-specific intelligence; pathfinding to key government contacts; referrals to investment professionals; and facilitation of site visits 5
Other.. 77

Q3
CALCULATION

Preparing you for international markets through the provision of advice and information as you pursue commercial opportunities in a market, including the recommendations of trade fairs and trade missions to attend. 1

Assessing your potential in a target market through the provision of market intelligence and information, as well as advice on improving your market strategy 2
Finding qualified contacts in your target market such as potential buyers and partners, professionals in financial and legal institutions, technology sources, agents, etc. Referring you to technology partnership opportunities or foreign research and development partnership opportunities 3
Resolving problems such as advising on market access problems, local regulations and technical standards and other business challenges including: customs clearance and shipping, unfair business treatment, overdue accounts receivable, etc. 4
Supporting your decision to invest or expand your operations in Canada through the provision of: information on Canada's business environment; sector-specific intelligence; pathfinding to key government contacts; referrals to investment professionals; and facilitation of site visits 5
Other (SPECIFY) 77
Have never received any of the above .... 99 X

Q4

NOT FDI

At the time of your most recent service, was your organization already active and/or doing business internationally?

Yes, doing business internationally 1
Yes, already doing business internationally but expanding to new country(ies) 2
First time doing business abroad 3
Not applicable 9

Q5

NOT FDI

What were the main reasons for your organization's interest in international markets?

SELECT ALL THAT APPLY
Export of goods (products, commodities) 1
Export of services, including financial services 2
Making Canadian Direct Investment Abroad (CDIA) including a foreign acquisition, green field, equity investment or joint venture 3
Seeking international sources of project financing or venture capital 4
Seeking research and development and/or technology partnership opportunities 5
Licensing or franchising your technology internationally 6
Acquiring or sourcing a foreign technology 7
Sourcing foreign inputs, components, services or other imports to remain competitive 8
Other (SPECIFY) 77
Don't know / not sure .... 99 X

PQ6

Please indicate the level to which you disagree or agree with each of the following statements as it pertains to your most recent service request, that is <Q2/Q2B>

Q6A

Staff understood enough about the dynamics of the specific business or sector involved to add value to our business development effort

Strongly disagree 1
Disagree... 2
Neither disagree nor agree 3
Agree 4
Strongly agree... 5
Don't know / Not applicable 9

Q6B

I waited a reasonable amount of time to obtain what I needed

Strongly disagree 1
Disagree... 2
Neither disagree nor agree 3
Agree 4
Strongly agree... 5
Don't know / Not applicable 9

Q6C

Preparing you for international markets

The information I received was helpful to understand overall market conditions

Strongly disagree 1
Disagree... 2
Neither disagree nor agree 3
Agree 4
Strongly agree... 5
Don't know / Not applicable 9

Q6D

Finding qualified contacts

The contacts I received were the right people with which to do business

Strongly disagree 1
Disagree... 2
Neither disagree nor agree 3
Agree 4
Strongly agree... 5
Don't know / Not applicable 9

Q6E

Assessing your potential

The market intelligence/information about local companies and organizations was useful

Strongly disagree 1
Disagree... 2
Neither disagree nor agree 3
Agree 4
Strongly agree... 5
Don't know / Not applicable 9

Q6F

Assessing your potential

The intelligence provided identified both opportunities and potential difficulties

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know / Not applicable 9

Q6G

Resolving problems

The information and advice I received helped me address the problem(s)

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know / Not applicable 9

Q6H

Resolving problems

Staff referred me to the right contacts if they could not help me directly

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know / Not applicable 9

Q6I

FDI

Staff were knowledgeable and competent about investment opportunities in Canada

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know / Not applicable 9

Q6J

FDI

The referrals provided to me were the right ones and helpful

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5

Don't know / Not applicable 9

Q6K

FDI

The information and documentation provided to me was relevant, up-to-date and credible

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know / Not applicable 9

Q6L

FDI

The level of site visit support provided to my organization was satisfactory

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know / Not applicable 9

Q6POST

(Please note that other attributes of service delivery and standards are evaluated on a continuous basis using a short after service online client survey.)

PQ7

The next set of questions explores the types of services your organization needs with respect to conducting international business, as well as the types of obstacles or challenges you face in doing so.

Q7A

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Market intelligence and information, including the advantages of existing trade and investment agreements, as well as advice on improving your market strategy

No need at all 1
Slight need 2
Fairly strong need 3
Very strong need 4
Don't know 9
Not applicable 99

Q7B

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Qualified contacts such as potential buyers and partners, technology sources, agents, etc.
No need at all.. 1
Slight need 2
Fairly strong need.. 3
Very strong need 4
Don't know 9
Not applicable... 99

Q7C

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Referrals to professionals in financial and legal institutions to deal with issues such as overdue accounts receivable, shipping arrangements, etc.
No need at all.. 1
Slight need 2
Fairly strong need.. 3
Very strong need 4
Don't know 9
Not applicable... 99

Q7D

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Support for the protection of intellectual property rights, government procurement, regulatory matters, technical standards, sanitary and phytosanitary issues, tariff rates, customs procedures, etc.
No need at all.. 1
Slight need 2
Fairly strong need.. 3
Very strong need 4
Don't know 9
Not applicable... 99

Q7E

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Referral of international business opportunities (i.e. export sales leads)
No need at all.. 1
Slight need 2
Fairly strong need.. 3

Very strong need 4
Don't know 9
Not applicable... 99

Q7F

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Referral of technology partnership opportunities or foreign research and development partnership opportunities

No need at all.. 1
Slight need 2
Fairly strong need... 3
Very strong need 4
Don't know 9
Not applicable... 99

Q7G

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Referrals to other relevant commercial programs and services or other third party service providers

No need at all.. 1
Slight need 2
Fairly strong need... 3
Very strong need 4
Don't know 9
Not applicable... 99

Q7H

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Information or advice on export and/or project financing

No need at all.. 1
Slight need 2
Fairly strong need... 3
Very strong need 4
Don't know 9
Not applicable... 99

Q7I

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Help in locating financial/funding assistance
No need at all.. 1
Slight need 2
Fairly strong need.. 3
Very strong need 4
Don't know 9
Not applicable... 99

Q7J

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Recommendations of trade fairs and trade missions to attend
No need at all.. 1
Slight need 2
Fairly strong need.. 3
Very strong need 4
Don't know 9
Not applicable... 99

Q7K

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Practical advice on timing and organizing your business trip
No need at all.. 1
Slight need 2
Fairly strong need.. 3
Very strong need 4
Don't know 9
Not applicable... 99

Q7L

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Information on local organizations or companies that you have identified
No need at all.. 1
Slight need 2
Fairly strong need.. 3
Very strong need 4
Don't know 9

Not applicable.. 99

Q7M

NOT FDI

How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

Understanding responsible business practices including the integration of corporate social responsibility principles into operations overseas

No need at all.. 1
Slight need 2
Fairly strong need.. 3
Very strong need 4
Don't know 9
Not applicable.. 99

QXC1

FDI

When considering an investment or an expansion of your operations in Canada or elsewhere, where do you seek information about investment opportunities?

SELECT UP TO 3

Professional advisors (e.g. law firms, accountancy firms) 1
Financial and business press.. 2
Inward investment agency of destination country 3
Annual reports 4
Industry colleagues.. 5
Trade fairs and exhibitions 6
Work colleagues... 7
Government sources 8
Other (SPECIFY) 77

PQXC2

FDI

In considering Canada as a place to invest or expand your operations, how would you rank its competitiveness within North America on the following attributes?

QXC2A

FDI

Access to export markets

Not at all competitive 1
Not very competitive 2
Somewhat competitive 3
Very competitive 4
Don't know 9

QXC2B

FDI

Raw material costs

Not at all competitive 1
Not very competitive 2
Somewhat competitive 3
Very competitive 4
Don't know 9

QXC2C

FDI

Energy costs

Not at all competitive 1
Not very competitive 2
Somewhat competitive 3
Very competitive 4
Don't know 9

QXC2D

FDI

Availability of labour

Not at all competitive 1
Not very competitive 2
Somewhat competitive 3
Very competitive 4
Don't know 9

QXC2E

FDI

Labour quality and costs

Not at all competitive 1
Not very competitive 2
Somewhat competitive 3
Very competitive 4
Don't know 9

QXC2F

FDI

Business taxes

Not at all competitive 1
Not very competitive 2
Somewhat competitive 3
Very competitive 4
Don't know 9

QXC2G

FDI

Technology and innovation
Not at all competitive 1
Not very competitive 2
Somewhat competitive 3
Very competitive 4
Don't know 9

QXC2H

FDI

Research and development capability or facilities
Not at all competitive 1
Not very competitive 2
Somewhat competitive 3
Very competitive 4
Don't know 9

QXC2I

FDI

Business friendly environment
Not at all competitive 1
Not very competitive 2
Somewhat competitive 3
Very competitive 4
Don't know 9

QXC2J

FDI

Government programs and incentives
Not at all competitive 1
Not very competitive 2
Somewhat competitive 3
Very competitive 4
Don't know 9

QXC3

FDI

What were the main reasons for your organization's interest in investing or expanding its operations in Canada?

SELECT ALL THAT APPLY
To service the Canadian market 1
To service the North American Market 2
To access raw material, energy or other inputs 3
To access Canadian labour or skills 4
To access Canadian technology or expertise 5
To diversify into global markets 6
To diversify risk 7

To acquire a Canadian enterprise 8
Other (SPECIFY) 77

PQXC4

FDI

How important are the following factors to your organization when considering Canada as a place to invest?

QXC4A

FDI

Ease of doing business
Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

QXC4B

FDI

Overall business costs
Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

QXC4C

FDI

Corporate taxes
Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

QXC4D

FDI

Personal taxes
Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

QXC4E

FDI

Investment incentives

Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

QXC4F

FDI

Foreign ownership restrictions

Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

QXC4G

FDI

Other regulations and legislation

Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

QXC4H

FDI

Labour availability and skills

Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

QXC4I

FDI

Immigration and business mobility

Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

QXC4J

FDI

Canada – U.S. border
Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable... 9

PQXC5

FDI

When considering an investment or an expansion of your operations in Canada, how important are the following services for your organization?

QXC5A

FDI

Information on Canada's business environment (e.g. taxation, tax credit, regulations, programs)
Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable... 9

QXC5B

FDI

Sector-specific market intelligence
Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable... 9

QXC5C

FDI

Pathfinding for key government contacts
Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable... 9

QXC5D

FDI

Referrals to investment professionals and industry associations
Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable... 9

QXC5E

FDI

Facilitation of site visits

Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

QXC5F

FDI

Ongoing operations support and troubleshooting

Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

QXC5G

FDI

Assistance in developing a business case for your next investment decision

Not at all important.. 1
Not very important 2
Somewhat important.. 3
Very important 4
Not applicable.. 9

Q8

NOT FDI

Are there any other types of services or products your organization has a strong need for when developing business in markets outside of Canada?

Please describe these services or products.. 77
No additional needs .... 98 X
Don't know .... 99 X

PQ9

NOT FDI

Thinking about the next three years, what do you expect your organization's top three international markets to be? Please note that this does not necessarily mean the markets where you anticipate your largest revenues or sales, rather where you expect the most growth, obstacles or opportunities.

Roll over markets to see definitions for each.

Q9A

NOT FDI

Top Market
Africa 1
Middle East 2
North Asia 3
South/South East Asia 4
Oceania 5
European Union (EU27) 6
Other European markets 7
Caribbean 8
Central America 9
South America 10
Mexico.......... 11
United States 12
No others / Don't know.......... 99

Q9B
NOT FDI

Second Market
Africa 1
Middle East 2
North Asia 3
South/South East Asia 4
Oceania 5
European Union (EU27) 6
Other European markets 7
Caribbean 8
Central America 9
South America 10
Mexico.......... 11
United States 12
No others / Don't know.......... 99

Q9C
NOT FDI

Third Market
Africa 1
Middle East 2
North Asia 3
South/South East Asia 4
Oceania 5
European Union (EU27) 6
Other European markets 7
Caribbean 8
Central America 9
South America 10
Mexico.......... 11
United States 12
No others / Don't know.......... 99

PQ10

NOT FDI

The table below identifies several obstacles or challenges that organizations face when pursuing business opportunities in foreign markets. How large of an obstacle is each of these to your organization?

Q10A

NOT FDI

The value of the Canadian dollar

No obstacle/ challenge at all 1
Minor obstacle/ challenge 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable........ 9

Q10B

NOT FDI

Canadian export taxes or permits

No obstacle/ challenge at all 1
Minor obstacle/ challenge 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable........ 9

Q10C

NOT FDI

Uncertainty of regulatory requirements in other countries

No obstacle/ challenge at all 1
Minor obstacle/ challenge 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable........ 9

Q10D

NOT FDI

Discriminatory or arbitrary treatment toward Canadian investors or their investments

No obstacle/ challenge at all 1
Minor obstacle/ challenge 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable........ 9

Q10E

NOT FDI

Lack of access to financing or funding

No obstacle/ challenge at all 1
Minor obstacle/ challenge 2

Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable.......... 9

Q10F

NOT FDI

Concern of violation of your patents and/or intellectual property rights
No obstacle/ challenge at all.......... 1
Minor obstacle/ challenge.......... 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable.......... 9

Q10G

NOT FDI

Foreign tariffs or trade barriers
No obstacle/ challenge at all.......... 1
Minor obstacle/ challenge.......... 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable.......... 9

Q10H

NOT FDI

Linguistic or cultural obstacles
No obstacle/ challenge at all.......... 1
Minor obstacle/ challenge.......... 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable.......... 9

Q10I

NOT FDI

Labour availability and skills
No obstacle/ challenge at all.......... 1
Minor obstacle/ challenge.......... 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable.......... 9

Q10J

NOT FDI

Corruption
No obstacle/ challenge at all.......... 1
Minor obstacle/ challenge.......... 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable.......... 9

Q10K

NOT FDI

Lack of international business opportunities (i.e. export sales leads)

No obstacle/ challenge at all 1
Minor obstacle/ challenge 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable 9

Q10L

NOT FDI

Not having market contacts such as potential buyers and partners, technology sources, agents, etc.

No obstacle/ challenge at all 1
Minor obstacle/ challenge 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable 9

Q10M

NOT FDI

Other obstacles or challenges (specify nature of obstacle or challenge) Q10BOX

No obstacle/ challenge at all 1
Minor obstacle/ challenge 2
Moderate obstacle/ challenge 3
Major obstacle/ challenge 4
Not applicable 9

PQ11

The next section looks at the extent to which the Trade Commissioner Service has contributed to the achievement of your organization's commercial objectives in your target market(s). For the following questions, please consider your overall relationship with the TCS; that is, the combined effect of all interactions with the TCS since July 1, 2011. Please indicate the level to which you disagree or agree with each of the following statements regarding the TCS' contribution to your international business development efforts.

Q11A

NOT FDI

The TCS helped my organization...

Gain confidence to explore or expand in a foreign market

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know 9

Q11B

NOT FDI

The TCS helped my organization...

Gain access to customers and partners that would have been difficult to obtain without the support of the TCS

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know 9

Q11C

NOT FDI

The TCS helped my organization...

Gain access to intelligence and information that would have been difficult to obtain without the support of the TCS

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know 9

Q11D

NOT FDI

The TCS helped my organization...

Overcome or avoid barriers to new foreign business opportunities

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know 9

Q11E

NOT FDI

The TCS helped my organization...

Improve our profile and credibility in foreign markets

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know 9

Q11F

NOT FDI

The TCS helped my organization...

Improve our knowledge of the competitive environment in our target market(s)

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know 9

Q11G

NOT FDI

The TCS helped my organization...

Improve our marketing strategy in our target market(s)

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know 9

Q11H

NOT FDI

The TCS helped my organization...

Avoid mistakes, delays or incurring additional costs in pursuing an opportunity

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know 9

Q11I

NOT FDI

The TCS helped my organization...

Obtain and assess market or industry information which helped us decide whether or not to pursue an opportunity

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know 9

Q11J

NOT FDI

The TCS helped my organization...

Improve our ability to address regulatory problems or other non-tariff barriers encountered in target market
Strongly disagree 1
Disagree.. 2
Neither disagree nor agree 3
Agree 4
Strongly agree.. 5
Don't know 9

Q11K

NOT FDI

The TCS helped my organization...

Obtain information and assistance on corporate social responsibility
Strongly disagree 1
Disagree.. 2
Neither disagree nor agree 3
Agree 4
Strongly agree.. 5
Don't know 9

Q11L

FDI

The TCS helped my organization...

Improve our knowledge of investment opportunities in Canada
Strongly disagree 1
Disagree.. 2
Neither disagree nor agree 3
Agree 4
Strongly agree.. 5
Don't know 9

Q11M

FDI

The TCS helped my organization...

Assess Canadian locations against competing locations globally
Strongly disagree 1
Disagree.. 2
Neither disagree nor agree 3
Agree 4
Strongly agree.. 5
Don't know 9

Q11N

FDI

The TCS helped my organization...

Make the final decision to invest or expand our operations in Canada

Strongly disagree 1
Disagree 2
Neither disagree nor agree 3
Agree 4
Strongly agree 5
Don't know 9

Q12

NO SKIPS TO PQ23& NOT FDI

Since July 1, 2011 has your organization actively pursued or entered into negotiations of a commercial agreement (e.g. sales, licensing, investment, innovation, sourcing, etc.) with a business partner in markets where you received assistance from the TCS? Please rest assured that all information you provide will be kept completely confidential and only aggregate results will be reported.

Yes 1
No 2
Not applicable 9

Q13

NO, DK SKIPS TO PQ23& NOT FDI

Between July 1, 2011 and December 31, 2012 has your organization concluded (i.e. signed) any new commercial agreement(s) with a foreign business partner(s) in markets where you received assistance from the TCS?

Yes 1
No 2
Don't know 9

Q14

NO, DK, DECLINE SKIPS TO PQ23 & NOT FDI

Between July 1, 2011 and December 31, 2012, did your organization record (or contribute to) any financial results in markets where you received assistance from the TCS?

Yes 1
No 2
Don't know 8
Decline 9

Q15
NOT FDI

What type of financial results did you achieve?

SELECT ALL THAT APPLY

Export of goods 1
Export of services 2
New direct investment in Canada 3
Expansion of existing investment in Canada 4
Investment abroad leading to revenue 5
Partnership, joint venture or other alliance leading to revenue 6
Foreign affiliate sales 7
Licensing of technology 8
Attracting angel investors or venture capital 9
Resumption or increase in sales after the pre-existing barrier to market access was removed 10
Other (SPECIFY) 77
Don't know 99

Q15APRE
EXPORT OF GOODS; NOT FDI

Q16A
EXPORT OF GOODS; NOT FDI

Referring specifically to export of goods, what was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.

Total Value: $ If not sure, to the best of your knowledge was it: 1
Less than $10,000 2
$10,000 to less than $25,000 3
$25,000 to less than $100,000 4
$100,000 to less than $1 million 5
$1 million to less than $2 million 6
$2 million to less than $5 million 7
$5 million to less than $10 million 8
$10 million to less than $50 million 9
$50 million to less than $100 million 10
$100 million or more 11
Don't know 98
Decline 99

Q17A

EXPORT OF GOODS; NOT FDI

What was the extent of the contribution made by the Trade Commissioner Service to achieving this result?

1 – No contribution.. 1
2... 2
3 Moderate or partial contribution 3
4... 4
5 – Essential contribution 5
Don't know 9

Q18A

EXPORT OF GOODS; NOT FDI

Would you have achieved this financial result without the help of the TCS?

Yes... 1
Yes, but it would have taken more time and resources and/or the financial results would have been lower 2
No.. 3
Don't know 9

Q15BPRE

EXPORT OF SERVICES; NOT FDI

Q16B

EXPORT OF SERVICES; NOT FDI

Referring specifically to export of services, what was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.

Total Value: $ If not sure, to the best of your knowledge was it: 1
Less than $10,000.. 2
$10,000 to less than $25,000 3
$25,000 to less than $100,000 4
$100,000 to less than $1 million.. 5
$1 million to less than $2 million 6
$2 million to less than $5 million 7
$5 million to less than $10 million 8
$10 million to less than $50 million 9
$50 million to less than $100 million 10
$100 million or more 11
Don't know 98
Decline 99

Q17B

EXPORT OF SERVICES; NOT FDI

What was the extent of the contribution made by the Trade Commissioner Service to achieving this result?

1 – No contribution.. 1
2.. 2
3 Moderate or partial contribution.. 3
4.. 4
5 – Essential contribution 5
Don't know 9

Q18B

EXPORT OF SERVICES; NOT FDI

Would you have achieved this financial result without the help of the TCS?

Yes.. 1
Yes, but it would have taken more time and resources and/or the financial results would have been lower 2
No.. 3
Don't know 9

Q15CPRE

New direct investment in Canada; NOT FDI

Q16C

New direct investment in Canada; NOT FDI

Referring specifically to new direct investment in Canada, what was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.

Total Value: $ If not sure, to the best of your knowledge was it: 1
Less than $10,000.. 2
$10,000 to less than $25,000 3
$25,000 to less than $100,000 4
$100,000 to less than $1 million.. 5
$1 million to less than $2 million 6
$2 million to less than $5 million 7
$5 million to less than $10 million 8
$10 million to less than $50 million 9
$50 million to less than $100 million 10
$100 million or more 11
Don't know 98
Decline 99

Q17C

New direct investment in Canada; NOT FDI

What was the extent of the contribution made by the Trade Commissioner Service to achieving this result?

1 – No contribution 1
2 2
3 Moderate or partial contribution 3
4 4
5 – Essential contribution 5
Don't know 9

Q18C

New direct investment in Canada; NOT FDI

Would you have achieved this financial result without the help of the TCS?

Yes 1
Yes, but it would have taken more time and resources and/or the financial results would have been lower 2
No 3
Don't know 9

Q15DPRE

Expansion of existing investment in Canada; NOT FDI

Q16D

Expansion of existing investment in Canada; NOT FDI

Referring specifically to expansion of existing investment in Canada, what was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.

Total Value: $ If not sure, to the best of your knowledge was it: 1
Less than $10,000 2
$10,000 to less than $25,000 3
$25,000 to less than $100,000 4
$100,000 to less than $1 million 5
$1 million to less than $2 million 6
$2 million to less than $5 million 7
$5 million to less than $10 million 8
$10 million to less than $50 million 9
$50 million to less than $100 million 10
$100 million or more 11
Don't know 98
Decline 99

Q17D

Expansion of existing investment in Canada; NOT FDI

What was the extent of the contribution made by the Trade Commissioner Service to achieving this result?

1 – No contribution.. 1
2.. 2
3 Moderate or partial contribution.. 3
4.. 4
5 – Essential contribution.. 5
Don't know.. 9

Q18D

Expansion of existing investment in Canada; NOT FDI

Would you have achieved this financial result without the help of the TCS?

Yes.. 1
Yes, but it would have taken more time and resources and/or the financial results would have been lower.. 2
No.. 3
Don't know.. 9

Q15EPRE

INVESTMENT ABROAD LEADING TO REVENUE; NOT FDI

Q16E

INVESTMENT ABROAD LEADING TO REVENUE; NOT FDI

Referring specifically to investment abroad leading to revenue, what was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.

Total Value: $ If not sure, to the best of your knowledge was it:.. 1
Less than $10,000.. 2
$10,000 to less than $25,000.. 3
$25,000 to less than $100,000.. 4
$100,000 to less than $1 million.. 5
$1 million to less than $2 million.. 6
$2 million to less than $5 million.. 7
$5 million to less than $10 million.. 8
$10 million to less than $50 million.. 9
$50 million to less than $100 million.. 10
$100 million or more.. 11
Don't know.. 98
Decline.. 99

Q17E

INVESTMENT ABROAD LEADING TO REVENUE; NOT FDI

What was the extent of the contribution made by the Trade Commissioner Service to achieving this result?

1 – No contribution.. 1
2.. 2
3 Moderate or partial contribution.. 3
4.. 4
5 – Essential contribution.. 5
Don't know 9

Q18E

INVESTMENT ABROAD LEADING TO REVENUE; NOT FDI

Would you have achieved this financial result without the help of the TCS?

Yes.. 1
Yes, but it would have taken more time and resources and/or the financial results would have been lower 2
No.. 3
Don't know 9

Q15FPRE

Partnership, joint venture or other alliance leading to revenue; NOT FDI

Q16F

Partnership, joint venture or other alliance leading to revenue; NOT FDI

Referring specifically to partnership, joint venture or other alliance leading to revenue, what was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.

Total Value: $ If not sure, to the best of your knowledge was it: 1
Less than $10,000.. 2
$10,000 to less than $25,000 3
$25,000 to less than $100,000 4
$100,000 to less than $1 million... 5
$1 million to less than $2 million 6
$2 million to less than $5 million 7
$5 million to less than $10 million 8
$10 million to less than $50 million 9
$50 million to less than $100 million 10
$100 million or more.. 11
Don't know 98
Decline 99

Q17F

Partnership, joint venture or other alliance leading to revenue; NOT FDI

What was the extent of the contribution made by the Trade Commissioner Service to achieving this result?

1 – No contribution... 1
2... 2
3 Moderate or partial contribution.. 3
4... 4
5 – Essential contribution 5
Don't know 9

Q18F

Partnership, joint venture or other alliance leading to revenue; NOT FDI

Would you have achieved this financial result without the help of the TCS?

Yes... 1
Yes, but it would have taken more time and resources and/or the financial results would have been lower 2
No... 3
Don't know 9

Q15GPRE

Foreign affiliate sales; NOT FDI

Q16G

Foreign affiliate sales; NOT FDI

Referring specifically to foreign affiliate sales, what was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.

Total Value: $ If not sure, to the best of your knowledge was it: 1
Less than $10,000.. 2
$10,000 to less than $25,000 3
$25,000 to less than $100,000 4
$100,000 to less than $1 million.. 5
$1 million to less than $2 million 6
$2 million to less than $5 million 7
$5 million to less than $10 million 8
$10 million to less than $50 million 9
$50 million to less than $100 million 10
$100 million or more... 11
Don't know 98
Decline 99

Q17G

Foreign affiliate sales; NOT FDI

What was the extent of the contribution made by the Trade Commissioner Service to achieving this result?

1 – No contribution.......... 1
2.......... 2
3 Moderate or partial contribution.......... 3
4.......... 4
5 – Essential contribution.......... 5
Don't know.......... 9

Q18G

Foreign affiliate sales; NOT FDI

Would you have achieved this financial result without the help of the TCS?

Yes.......... 1
Yes, but it would have taken more time and resources and/or the financial results would have been lower.......... 2
No.......... 3
Don't know.......... 9

Q15HPRE

Licensing of technology; NOT FDI

Q16H

Licensing of technology; NOT FDI

Referring specifically to licensing of technology, what was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.

Total Value: $ If not sure, to the best of your knowledge was it:.......... 1
Less than $10,000.......... 2
$10,000 to less than $25,000.......... 3
$25,000 to less than $100,000.......... 4
$100,000 to less than $1 million.......... 5
$1 million to less than $2 million.......... 6
$2 million to less than $5 million.......... 7
$5 million to less than $10 million.......... 8
$10 million to less than $50 million.......... 9
$50 million to less than $100 million.......... 10
$100 million or more.......... 11
Don't know.......... 98
Decline.......... 99

Q17H

Licensing of technology; NOT FDI

What was the extent of the contribution made by the Trade Commissioner Service to achieving this result?

1 – No contribution.. 1
2.. 2
3 Moderate or partial contribution.. 3
4.. 4
5 – Essential contribution 5
Don't know 9

Q18H

Licensing of technology; NOT FDI

Would you have achieved this financial result without the help of the TCS?

Yes.. 1
Yes, but it would have taken more time and resources and/or the financial results would have been lower 2
No.. 3
Don't know 9

Q15IPRE

Attracting angel investors or venture capital; NOT FDI

Q16I

Attracting angel investors or venture capital; NOT FDI

Referring specifically to attracting angel investors or venture capital, what was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.

Total Value: $ If not sure, to the best of your knowledge was it: 1
Less than $10,000.. 2
$10,000 to less than $25,000 3
$25,000 to less than $100,000 4
$100,000 to less than $1 million.. 5
$1 million to less than $2 million 6
$2 million to less than $5 million 7
$5 million to less than $10 million 8
$10 million to less than $50 million 9
$50 million to less than $100 million 10
$100 million or more 11
Don't know 98
Decline 99

Q17I

Attracting angel investors or venture capital; NOT FDI

What was the extent of the contribution made by the Trade Commissioner Service to achieving this result?

1 – No contribution.. 1
2... 2
3 Moderate or partial contribution.. 3
4... 4
5 – Essential contribution 5
Don't know 9

Q18I

Attracting angel investors or venture capital; NOT FDI

Would you have achieved this financial result without the help of the TCS?

Yes.. 1
Yes, but it would have taken more time and resources and/or the financial results would have been lower 2
No.. 3
Don't know 9

Q15JPRE

Derived from the resumption or increase in sales after the pre-existing barrier to market access was removed; NOT FDI

Q16J

Derived from the resumption or increase in sales after the pre-existing barrier to market access was removed; NOT FDI

Referring specifically to the resumption or increase in sales after the pre-existing barrier to market access was removed, what was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.

Total Value: $ If not sure, to the best of your knowledge was it:.............................. 1
Less than $10,000... 2
$10,000 to less than $25,000 3
$25,000 to less than $100,000 4
$100,000 to less than $1 million.. 5
$1 million to less than $2 million 6
$2 million to less than $5 million 7
$5 million to less than $10 million 8
$10 million to less than $50 million 9
$50 million to less than $100 million 10
$100 million or more 11
Don't know 98
Decline 99

Q17J

Derived from the resumption or increase in sales after the pre-existing barrier to market access was removed; NOT FDI

What was the extent of the contribution made by the Trade Commissioner Service to achieving this result?

1 – No contribution 1
2 2
3 Moderate or partial contribution 3
4 4
5 – Essential contribution 5
Don't know 9

Q18J

Derived from the resumption or increase in sales after the pre-existing barrier to market access was removed; NOT FDI

Would you have achieved this financial result without the help of the TCS?

Yes 1
Yes, but it would have taken more time and resources and/or the financial results would have been lower 2
No 3
Don't know 9

Q15KPRE

OTHER; NOT FDI

Q16K

OTHER; NOT FDI

Referring specifically to <Q15> what was the approximate total value of these financial results in Canadian dollars for your organization's most recent annual financial reporting period? If it included partners, please indicate the value to your organization only.

Total Value: $ If not sure, to the best of your knowledge was it: 1
Less than $10,000 2
$10,000 to less than $25,000 3
$25,000 to less than $100,000 4
$100,000 to less than $1 million 5
$1 million to less than $2 million 6
$2 million to less than $5 million 7
$5 million to less than $10 million 8
$10 million to less than $50 million 9
$50 million to less than $100 million 10
$100 million or more 11
Don't know 98
Decline 99

Q17K

OTHER; NOT FDI

What was the extent of the contribution made by the Trade Commissioner Service to achieving this result?

1 – No contribution.. 1
2... 2
3 Moderate or partial contribution 3
4... 4
5 – Essential contribution 5
Don't know 9

Q18K

OTHER; NOT FDI

Would you have achieved this financial result without the help of the TCS?

Yes.. 1
Yes, but it would have taken more time and resources and/or the financial results would have been lower 2
No 3
Don't know 9

Q19

NO, NA, DK, DECLINE SKIP TO Q21& NOT FDI

Did the conclusion of new sales/partnership agreement(s) with overseas business partners in markets where you received assistance from the TCS lead to a change in the size of workforce within your organization in Canada?

Yes.. 1
No 2
Not applicable... 7
Don't know 8
Decline 9

Q20PRE

NOT FDI

Q20A

NOT FDI

Which of the following best describes the estimated change in the size of the workforce within your organization in Canada?

Enter direction of change
Increase.. 1
Decrease 2
Don't know / Decline 9

Q20B

NOT FDI

Enter the estimated amount of change as percentage of overall workforce 1
Don't know / Decline 999

Q21

NO, NA, DK, DECLINE SKIP TO PQ23 & NOT FDI

Did the conclusion of new sales/partnership agreement(s) with overseas business partners in markets where you received assistance from the TCS lead to a transfer of any new technologies?

Yes.. 1
No.. 2
Not applicable.. 7
Don't know 8
Decline 9

Q22

NOT FDI

Which of the transfer of new technologies took place as a result of the conclusion of new sales/partnership agreement(s) with overseas business partners?

SELECT ALL THAT APPLY
Flow of new technology from foreign partner to Canada 1
Flow of new technology from Canada to foreign partner 2
Pursuit of joint research and development 3
Other 77
Don't know .... 99 X

PQ23

From July 11, 2011 to December 31, 2012, did your organization introduce

Q23A

New or significantly improved goods? (excluding the simple resale of new goods purchased from other organizations and changes of a solely aesthetic nature)
Yes.. 1
No.. 2

Q23B

New or significantly improved services?
Yes.. 1
No.. 2

Q23C

New or significantly improved methods of manufacturing or producing goods or services?

Yes 1
No 2

Q24A

NEW OR SIGNIFICANTLY IMPROVED GOODS

Were those new or significantly improved goods introduced...?

Domestically 1
Internationally 2
Both 3

Q24B

NEW OR SIGNIFICANTLY IMPROVED SERVICES

Were those new or significantly improved services introduced...?

Domestically 1
Internationally 2
Both 3

Q24C

NEW OR SIGNIFICANTLY IMPROVED METHODS OF MANUFACTURING OR PRODUCING GOODS OR SERVICES

Were those new or significantly improved methods of manufacturing or producing goods or services introduced...?

Domestically 1
Internationally 2
Both 3

Q25

YES, Q23A, B or C

What was the extent of the contribution made by the services that your organization received from the Trade Commissioner Service to the new or significantly improved goods/service or methods of manufacturing/production introduced?

1 – No contribution 1
2 2
3 Moderate or partial contribution 3
4 4
5 – Essential contribution 5
Don't know 9

PQ26

Based on your experience with TCS since July 1, 2011:

Q26V1

HALF SAMPLE

How likely are you to recommend the services of the TCS to a colleague or business associate?

Definitely not 1
Probably not 2
Possibly 3
Probably 4
Definitely 5
Don't know 99

Q26B

How likely are you to use the services of the TCS again?

Definitely not 1
Probably not 2
Possibly 3
Probably 4
Definitely 5
Don't know 99

Q26V2

HALF SAMPLE

Based on your experience with TCS since July 1, 2011, how likely are you to recommend the services of the TCS to a colleague or business associate?

Extremely unlikely 1 1
2 2
3 3
4 4
5 5
6 6
7 7
8 8
9 9
Extremely likely 10 10
Don't know 99

Q27

How would you rate your overall satisfaction with the service and advice provided by the TCS across all of your interactions with the Trade Commissioner Service (TCS) since July 1, 2011?

Very Dissatisfied 1 1
2 2
3 3
4 4

Very Satisfied 5 5
Don't know 9

Q28

NO, DK, DECLINE SKIP TO Q30

Has your organization received a service from another Canadian trade promotion organization or a provincial, territorial or municipal organization involved in economic development between July 1, 2011 and December 31, 2012?

Yes 1
No 2
Don't know 8
Decline 9

PQ29

Finally, we would like you to think about any services your organization has received between July 1, 2011 and December 31, 2012 from another Canadian trade promotion organization (e.g., another federal government department, Export Development Canada, Business Development Bank of Canada, Canadian Commercial Corporation) or a provincial, territorial or municipal organization involved in economic development. Please compare it with the most recent service that your organization received from TCS during that same period. How would you say that they compare in the following areas?

Q29A

Quality of service
Other organization much better 1
Other organization a little better 2
About the same 3
TCS a little better 4
TCS much better 5
Don't know 6
Can't compare them/ Not applicable 7

Q29B

Timeliness of service
Other organization much better 1
Other organization a little better 2
About the same 3
TCS a little better 4
TCS much better 5
Don't know 6
Can't compare them/ Not applicable 7

Q29C

Overall impact of service on your organization
Other organization much better 1

Other organization a little better 2
About the same 3
TCS a little better 4
TCS much better 5
Don't know 6
Can't compare them/ Not applicable 7

Q29D

Overall satisfaction with service

Other organization much better 1
Other organization a little better 2
About the same 3
TCS a little better 4
TCS much better 5
Don't know 6
Can't compare them/ Not applicable 7

Q30

The collection of some information on your organization will help with the analysis of survey results. All information collected in the survey will be reported in aggregate form to profile organizations. Individual organization / business information will be kept confidential. How many employees do you have in your organization? Please include employees from all locations in your organization.

Under 10 1
10 to 49 2
50 to 99 3
100 to 499 4
500 to 999 5
1000 or more 6
Don't know 98
Decline 99

Q31

What were your organization's total worldwide sales and revenues (including domestic sales) in Canadian dollars for your organization's most recent annual financial reporting period?

Less than $250,000 1
$250,000 to less than $1 million 2
$1 million to less than $5 million 3
$5 million to less than $25 million 4
$25 million or more 5
Not applicable 97
Decline 98
Don't know 99

Q32

Please indicate where your organization's ultimate global parent is located. Is it headquartered in...:

Canada	1	
the United States	2	
Mexico or Central America (including the Caribbean)	3	
South America	4	
Europe	5	
Asia	6	
the Middle East	7	
Africa	8	
Decline	99	

Q33

Please provide any further comments or suggestions you may have on ways of improving the quality of the TCS' services and products in response to your evolving needs.

Additional comments	77	
No further comments	99	X
Inconsistencies with offices/staff/level of service (staff lacking knowledge/good service/motivation, inconsistencies with service depending on the office/person they are dealing with, staff needs training, staff transfered around too much that results in no continuity of service...)	1	i
Their experience was good, excellent service, happy with level of services	2	i
Lack of contact, lack of access to offices (e.g: no reply/response, no follow up/through, offices being closed...)	3	i
More trade shows/events, more opportunities to attend/participate in	4	i
more efforts needed to provide better support to them, need to understand the Needs of their business//their market/climate of their business	5	I

QEND

1 1

THNK

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS IMPORTANT SURVEY. The survey has been successfully submitted.

Aggregate results will be available in the summer at: www.tradecommissioner.gc.ca/clientsurvey2013.

THNK2

Based on the information you have provided, you are not eligible to complete the remainder of this survey. Thank you for your interest.

INTRO

Le Service des délégués commerciaux du Canada (SDC) du ministère des Affaires étrangères et du Commerce international mène un sondage pour évaluer la qualité des services qu'il offre et le niveau de satisfaction de ses clients par rapport à ces services. Le sondage est également conçu pour déterminer les besoins et les attentes des clients en matière de services, et pour connaître les résultats qu'ils obtiennent. En tant que tierce partie indépendante, la société de recherche sur l'opinion publique EKOS Research Associates a été mandatée par Affaires étrangères et Commerce international Canada pour mener un sondage.

Vous êtes libre de participer ou non à ce sondage et votre décision à cet égard n'aura aucune incidence sur les relations que vous pourriez avoir avec le gouvernement du Canada. En répondant à ces questions, vous aiderez le gouvernement à améliorer les services qu'il offre à ses clients.

Les réponses au sondage seront traitées en toute confidentialité et apparaîtront dans le rapport sous forme de données globales. Les renseignements que vous fournirez ne seront utilisés qu'à des fins de recherche et seront gérés en conformité avec les lois de protection de la vie privée en vigueur. Une fois que les réponses auront été réunies dans un tableau, vous pourrez consulter l'ensemble des résultats du sondage sur le site Web suivant : www.deleguescommerciaux.gc.ca/fra/document.jsp?did=140716.

Le SDC évalue sur une base permanente certains aspects de la prestation de services et des normes de service en ayant recours a posteriori à un court sondage en ligne à l'intention de ses clients. Le sondage actuel, plus exhaustif, vise à appuyer les constatations issues de ces sondages.

Vous devriez pouvoir répondre à ce sondage en environ 15-20 minutes.

Si vous avez commencé à répondre au sondage, mais n'avez pas terminé de le remplir, sachez que votre lien électronique demeure actif. Vous n'avez qu'à réutiliser le lien fourni ci-dessus et sélectionner « cliquez ici pour continuer » afin de reprendre le sondage là où il a été interrompu.

Q1

Avez-vous déjà reçu un service offert par le Service des délégués commerciaux (SDC) en passant par :

SÉLECTIONNEZ TOUT CE QUI S'APPLIQUE

Une ambassade, un haut-commissariat, un consulat ou un bureau commercial situé à l'extérieur du Canada	1		
Un bureau régional du SDC (situé dans l'une des provinces du Canada)	2		
Le site Web du Service des délégués commerciaux (http://www.deleguescommerciaux.gc.ca/)	3		
Le site Web Investir au Canada (http://investiraucanada.gc.ca/)	4		
Je ne me souviens pas d'avoir utilisé un service du SDC	9	X	->THNK2

Q2

Lesquels des services suivants offerts par le SDC avez-vous reçus entre le 1er juillet 2011 et le 31 décembre 2012?

SÉLECTIONNEZ TOUTES LES RÉPONSES PERTINENTES

Préparation aux marchés mondiaux par le biais de conseils et de renseignements donnés aux clients qui sont à la recherche de débouchés commerciaux dans un marché. Recommandations de foires et missions commerciales auxquelles participer.......... 1

Évaluation de votre potentiel dans un marché cible par le biais d'information sur le marché et de conseils quant à la façon d'améliorer votre stratégie de marché........ 2

Trouver des contacts qualifiés dans votre marché cible, comme des acheteurs et partenaires potentiels, des professionnels d'institutions financières et juridiques, des sources de technologies, des intermédiaires, etc. Recommandations d'occasions de partenariat en matière de technologies ou de recherches à l'étranger et développement de possibilités de partenariat.......... 3

Résolution de problème par le biais de conseils sur les problèmes d'accès au marché, la réglementation locale et les normes techniques et autres défis de nature commerciale, y compris le dédouanement et l'expédition, les pratiques commerciales déloyales, les comptes en souffrance, etc. 4

Soutien de votre décision d'investir ou de stimuler l'expansion de vos activités commerciales au Canada par le biais de : renseignements sur le contexte commercial du Canada; renseignements sur un secteur en particulier; services d'orientation vers des ressources gouvernementales clés; référence à un spécialiste de l'investissement; services de facilitation de visites de lieux 5

Autre (PRÉCISEZ) 77

Je n'ai jamais utilisé un de ces services .... 99 X ->THNK2

Q2B

Lequel de ces services représente le service le plus récent que vous ayez reçu?

Préparation aux marchés mondiaux par le biais de conseils et de renseignements donnés aux clients qui sont à la recherche de débouchés commerciaux dans un marché. Recommandations de foires et missions commerciales auxquelles participer.......... 1

Évaluation de votre potentiel dans un marché cible par le biais d'information sur le marché et de conseils quant à la façon d'améliorer votre stratégie de marché........ 2

Trouver des contacts qualifiés dans votre marché cible, comme des acheteurs et partenaires potentiels, des professionnels d'institutions financières et juridiques, des sources de technologies, des intermédiaires, etc. Recommandations d'occasions de partenariat en matière de technologies ou de recherches à l'étranger et développement de possibilités de partenariat.......... 3

Résolution de problème par le biais de conseils sur les problèmes d'accès au marché, la réglementation locale et les normes techniques et autres défis de nature commerciale, y compris le dédouanement et l'expédition, les pratiques commerciales déloyales, les comptes en souffrance, etc. 4

Soutien de votre décision d'investir ou de stimuler l'expansion de vos activités commerciales au Canada par le biais de : renseignements sur le contexte commercial du Canada; renseignements sur un secteur en particulier; services d'orientation vers des ressources gouvernementales clés; référence à un spécialiste de l'investissement; services de facilitation de visites de lieux 5

Autre.......... 77

Q3

CALCULATION

Préparation aux marchés mondiaux par le biais de conseils et de renseignements donnés aux clients qui sont à la recherche de débouchés commerciaux dans un marché. Recommandations de foires et missions commerciales auxquelles participer.. 1
Évaluation de votre potentiel dans un marché cible par le biais d'information sur le marché et de conseils quant à la façon d'améliorer votre stratégie de marché........ 2
Trouver des contacts qualifiés dans votre marché cible, comme des acheteurs et partenaires potentiels, des professionnels d'institutions financières et juridiques, des sources de technologies, des intermédiaires, etc. Recommandations d'occasions de partenariat en matière de technologies ou de recherches à l'étranger et développement de possibilités de partenariat.. 3
Résolution de problème par le biais de conseils sur les problèmes d'accès au marché, la réglementation locale et les normes techniques et autres défis de nature commerciale, y compris le dédouanement et l'expédition, les pratiques commerciales déloyales, les comptes en souffrance, etc. 4
Soutien de votre décision d'investir ou de stimuler l'expansion de vos activités commerciales au Canada par le biais de : renseignements sur le contexte commercial du Canada; renseignements sur un secteur en particulier; services d'orientation vers des ressources gouvernementales clés; référence à un spécialiste de l'investissement; services de facilitation de visites de lieux 5
Autre (PRÉCISEZ)... 77
Je n'ai jamais utilisé un de ces services .... 99 X

Q4

NOT FDI

Au moment où vous avez profité du plus récent service reçu, est-ce que votre organisation était déjà active ou faisait déjà des affaires à l'échelle internationale?

Oui, elle faisait des affaires à l'échelle internationale... 1
Oui, elle faisait des affaires à l'échelle internationale, mais elle explorait de nouveaux pay(s) 2
Elle faisait des affaires pour la première fois à l'étranger.. 3
Sans objet 9

Q5

NOT FDI

Quelles étaient les principales raisons pour lesquelles votre organisation s'intéressait à des marchés internationaux?

SÉLECTIONNEZ TOUTES LES RÉPONSES PERTINENTES
Exportation de biens (produits, marchandises)... 1
Exportation de services, y compris de services financiers... 2
Faire un Investissement direct canadien à l'étranger (IDE) y compris une acquisition étrangère, de nouvelles installations, un placement en actions ou une coentreprise 3
Recherche de sources internationales pour un financement de projet ou capital de risque 4
Recherche de partenariats en recherche et développement ou en technologie 5
Licenciation ou franchisage de votre technologie à l'échelle internationale.............. 6

Acquisition ou approvisionnement en technologie étrangère 7
Approvisionnement en intrants étrangers, composantes, services ou autres
importations afin de demeurer concurrentielle 8
Autre, précisez 77
Je ne sais pas/ne suis pas certain(e) .... 99 X

PQ6

Veuillez indiquer dans quelle mesure vous êtes en désaccord ou d'accord avec chacun des énoncés suivants quant au plus récent service reçu <Q2/Q2B>

Q6A

Le personnel comprenait assez bien la dynamique de l'entreprise ou du secteur spécifique pour ajouter de la valeur à nos efforts de développement d'entreprise

Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas / Ne s'applique pas 9

Q6B

Le délai avant que j'obtienne ce dont j'avais besoin m'a semblé raisonnable

Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas / Ne s'applique pas 9

Q6C

Preparing you for international markets

Les renseignements que j'ai reçus m'ont été utiles pour comprendre la conjoncture globale du marché

Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas / Ne s'applique pas 9

Q6D

Finding qualified contacts

Les personnes-ressources qui m'ont été recommandées étaient les personnes indiquées avec qui faire des affaires.

Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5

Je ne sais pas / Ne s'applique pas... 9

Q6E

Assessing your potential

Les renseignements sur les entreprises et organisations locales du marché se sont avérés utiles
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3
D'accord.. 4
Fortement d'accord 5
Je ne sais pas / Ne s'applique pas... 9

Q6F

Assessing your potential

Les renseignements fournis cernaient à la fois les possibilités d'affaires et les difficultés potentielles
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3
D'accord.. 4
Fortement d'accord 5
Je ne sais pas / Ne s'applique pas... 9

Q6G

Resolving problems

Les renseignements et les conseils que j'ai reçus m'ont aidé à régler le ou les problèmes
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3
D'accord.. 4
Fortement d'accord 5
Je ne sais pas / Ne s'applique pas... 9

Q6H

Resolving problems

Les employés m'ont recommandé les bonnes personnes-ressources lorsqu'ils n'étaient pas en mesure de m'aider directement
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3
D'accord.. 4
Fortement d'accord 5
Je ne sais pas / Ne s'applique pas... 9

Q6I

FDI

Les employés étaient compétents et bien renseignés sur les possibilités d'investissement au Canada
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3

D'accord.. 4
Fortement d'accord 5
Je ne sais pas / Ne s'applique pas.. 9

Q6J

FDI

Les références que l'on m'a données étaient les bonnes personnes et m'ont été utiles
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3
D'accord.. 4
Fortement d'accord 5
Je ne sais pas / Ne s'applique pas.. 9

Q6K

FDI

Les renseignements et les documents qui m'ont été fournis étaient pertinents, à jour et crédibles
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3
D'accord.. 4
Fortement d'accord 5
Je ne sais pas / Ne s'applique pas.. 9

Q6L

FDI

L'appui en matière de visites de lieux dont mon organisation a profité était satisfaisant
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3
D'accord.. 4
Fortement d'accord 5
Je ne sais pas / Ne s'applique pas.. 9

Q6POST

(D'autres aspects de la prestation de services et des normes de service sont évalués en continu à l'aide d'un court sondage en ligne à l'intention des clients.)

PQ7

La prochaine série de questions traite des types de services dont votre organisation a besoin lorsqu'il s'agit de faire affaire à l'échelle internationale et des types d'obstacles que vous devez surmonter ou de défis que vous avez à relever si vous le faites.

Q7A

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Renseignements sur le marché, y compris les avantages des accords d'investissement et des ententes commerciales en place, ainsi que des conseils pour l'amélioration de votre stratégie de développement de marchés

N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas 9
Sans objet 99

Q7B

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Personnes-ressources qualifiées, comme des acheteurs et partenaires potentiels, des sources de technologie, des intermédiaires, etc.

N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas 9
Sans objet 99

Q7C

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Recommandations de professionnels d'institutions financières et juridiques permettant de traiter certaines questions, comme les comptes clients en souffrance, les accords de transport, etc.

N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas 9
Sans objet 99

Q7D

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Aide avec la protection des droits de propriété intellectuelle, les marchés publics, les questions de réglementation, les normes techniques, les enjeux sanitaires et phytosanitaires, les taux tarifaires, les

procédures douanières, etc.
N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas... 9
Sans objet 99

Q7E

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Vous diriger vers des possibilités d'affaires internationales (c.-à-d. des pistes en ventes-export)
N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas... 9
Sans objet 99

Q7F

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Recommandations en matière de possibilités de partenariat en technologie, ou en partenariat de recherche et développement à l'étranger
N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas... 9
Sans objet 99

Q7G

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Recommandations vers d'autres programmes et services commerciaux pertinents ou vers des fournisseurs de services indépendants
N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas... 9
Sans objet 99

Q7H

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Vous donner de l'information ou des conseils sur l'exportation et/ou le financement de projets
N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas............ 9
Sans objet 99

Q7I

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Assistance pour trouver du financement ou de l'aide financière
N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas............ 9
Sans objet 99

Q7J

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Recommander des salons commerciaux et missions commerciales auxquels vous pourriez assister
N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas............ 9
Sans objet 99

Q7K

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Vous donner des conseils pratiques quant au moment opportun de faire votre voyage d'affaires et la logistique
N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4

Je ne sais pas.......... 9
Sans objet 99

Q7L

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Vous donner de l'information sur les organisations ou compagnies locales que vous avez identifiées
N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas.......... 9
Sans objet 99

Q7M

NOT FDI

Dans quelle mesure votre organisation a-t-elle besoin d'aide pour développer des occasions d'affaires dans des marchés à l'extérieur du Canada?

Compréhension de pratiques commerciales responsables, y compris l'intégration de principes de responsabilité sociale de l'entreprise dans les opérations menées à l'étranger
N'en a aucunement besoin 1
En a quelque peu besoin 2
En a passablement besoin 3
En a fortement besoin 4
Je ne sais pas.......... 9
Sans objet 99

QXC1

FDI

Lorsque vous envisagez un investissement ou une expansion de vos opérations au Canada ou ailleurs, où cherchez-vous des renseignements sur les possibilités d'investissement?

CHOISIR UN MAXIMUM DE 3 RÉPONSES
Conseillers professionnels (p. ex., un cabinet d'avocats, une société professionnelle comptable).......... 1
Presse commerciale et financière 2
Agence d'investissements étrangers du pays de destination 3
Rapports annuels 4
Collègues de l'industrie.......... 5
Foires commerciales et salons 6
Collègues de travail 7
Sources publiques.......... 8
Autre (PRÉCISEZ).......... 77

PQXC2

FDI

D'après vous, envisageant un investissement ou un élargissement de vos activités au Canada, comment classeriez-vous la position concurrentielle canadienne dans le contexte nord-américain sur les aspects suivant?

QXC2A

FDI

Accès à des marchés d'exportation

Pas du tout concurrentiel 1
Pas très concurrentiel 2
Plutôt concurrentiel 3
Très concurrentiel 4
Je ne sais pas 9

QXC2B

FDI

Coût des matières premières

Pas du tout concurrentiel 1
Pas très concurrentiel 2
Plutôt concurrentiel 3
Très concurrentiel 4
Je ne sais pas 9

QXC2C

FDI

Coût énergétique

Pas du tout concurrentiel 1
Pas très concurrentiel 2
Plutôt concurrentiel 3
Très concurrentiel 4
Je ne sais pas 9

QXC2D

FDI

Disponibilité de la main-d'œuvre

Pas du tout concurrentiel 1
Pas très concurrentiel 2
Plutôt concurrentiel 3
Très concurrentiel 4
Je ne sais pas 9

QXC2E

FDI

Coût et qualité de la main-d'œuvre

Pas du tout concurrentiel 1
Pas très concurrentiel 2
Plutôt concurrentiel 3

Très concurrentiel... 4
Je ne sais pas.. 9

QXC2F

FDI

Taxes d'affaires

Pas du tout concurrentiel 1
Pas très concurrentiel.. 2
Plutôt concurrentiel 3
Très concurrentiel... 4
Je ne sais pas.. 9

QXC2G

FDI

Technologie et innovation

Pas du tout concurrentiel 1
Pas très concurrentiel.. 2
Plutôt concurrentiel 3
Très concurrentiel... 4
Je ne sais pas.. 9

QXC2H

FDI

Capacité ou installations en matière de recherche et développement

Pas du tout concurrentiel 1
Pas très concurrentiel.. 2
Plutôt concurrentiel 3
Très concurrentiel... 4
Je ne sais pas.. 9

QXC2I

FDI

Environnement favorisant les affaires

Pas du tout concurrentiel 1
Pas très concurrentiel.. 2
Plutôt concurrentiel 3
Très concurrentiel... 4
Je ne sais pas.. 9

QXC2J

FDI

Programmes et mesures incitatives du gouvernement

Pas du tout concurrentiel 1
Pas très concurrentiel.. 2
Plutôt concurrentiel 3
Très concurrentiel... 4
Je ne sais pas.. 9

QXC3

FDI

Quelles sont les principales raisons pour lesquelles votre organisation souhaite investir ou étendre ses opérations au Canada?

SÉLECTIONNEZ TOUTES LES RÉPONSES PERTINENTES
Pour desservir le marché canadien 1
Pour desservir le marché nord-américain 2
Pour accéder à des matières premières, à de l'énergie et à d'autres intrants 3
Pour avoir accès à la main-d'œuvre ou aux compétences canadiennes...................... 4
Pour avoir accès à la technologie ou l'expertise canadienne.................................... 5
Pour des questions de diversification dans des marchés mondiaux........................... 6
Pour diversifier les risques encourus 7
Pour acquérir une entreprise canadienne 8
Autre (PRÉCISEZ)... 77

PQXC4

FDI

À quel point les facteurs suivants sont-ils importants pour votre organisation lorsque vous prenez le Canada en considération pour un investissement?

QXC4A

FDI

Facilité pour faire des affaires
Pas du tout important.. 1
Pas très important 2
Plutôt important.. 3
Très important 4
Sans objet 9

QXC4B

FDI

Coûts globaux liés aux activités commerciales
Pas du tout important.. 1
Pas très important 2
Plutôt important.. 3
Très important 4
Sans objet 9

QXC4C

FDI

Impôt des sociétés
Pas du tout important.. 1
Pas très important 2
Plutôt important.. 3
Très important 4
Sans objet 9

QXC4D

FDI

Impôt des particuliers
Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

QXC4E

FDI

Stimulants à l'investissement
Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

QXC4F

FDI

Restrictions en matière de propriété étrangère
Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

QXC4G

FDI

Autres règlements et lois
Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

QXC4H

FDI

Disponibilité et compétences de la main-d'œuvre
Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

QXC4I

FDI

Immigration et mobilité des gens d'affaires

Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

QXC4J

FDI

Frontière Canada-États-Unis

Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

PQXC5

FDI

Lorsqu'il est question d'un investissement ou de l'expansion de vos opérations au Canada, à quel point les services suivants sont-ils importants pour votre organisation?

QXC5A

FDI

Renseignements sur le contexte commercial du Canada (p. ex., imposition, crédit d'impôt, réglementation, programmes)

Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

QXC5B

FDI

Renseignements sur le marché d'un secteur en particulier

Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

QXC5C

FDI

Orientation vers des personnes-ressources importantes du gouvernement

Pas du tout important 1
Pas très important 2

Plutôt important 3
Très important 4
Sans objet 9

QXC5D

FDI

Recommandations vers des spécialistes en investissement et des associations d'industries
Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

QXC5E

FDI

Facilitation de visites de lieux
Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

QXC5F

FDI

Dépannage et soutien opérationnel continus
Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

QXC5G

FDI

Aide dans le développement d'une analyse de rentabilité pour votre prochaine décision en matière d'investissement
Pas du tout important 1
Pas très important 2
Plutôt important 3
Très important 4
Sans objet 9

Q8

NOT FDI

Y a-t-il d'autres types de services ou de produits dont votre organisation a réellement besoin pour faire affaire dans des marchés à l'extérieur du Canada?

Veuillez décrire ces produits ou services 77
Pas de besoins supplémentaires .... 98 X
Je ne sais pas .... 99 X

PQ9

NOT FDI

En pensant aux trois prochaines années, quels seront, selon vous, les marchés internationaux les plus importants de votre organisation? Veuillez noter que cela ne veut pas nécessairement dire les marchés où vous anticipez faire le plus de revenu ou de ventes, mais plutôt ceux où la croissance, les défis et/ou les opportunités seront les plus forts, selon vous.

Q9A

NOT FDI

Le plus important
Afrique 1
Moyen-Orient 2
Asie du Nord 3
Asie du Sud et du Sud-Est 4
Océanie 5
Union européenne (EU27) 6
Autres marchés européens 7
Antilles 8
Amérique centrale 9
Amérique du Sud 10
Mexique 11
États-Unis d'Amérique 12
Pas d'autres/Je ne sais pas 99

Q9B

NOT FDI

Le deuxième plus important
Afrique 1
Moyen-Orient 2
Asie du Nord 3
Asie du Sud et du Sud-Est 4
Océanie 5
Union européenne (EU27) 6
Autres marchés européens 7
Antilles 8
Amérique centrale 9
Amérique du Sud 10
Mexique 11
États-Unis d'Amérique 12
Pas d'autres/Je ne sais pas 99

Q9C

NOT FDI

Le troisième plus important
Afrique 1
Moyen-Orient 2
Asie du Nord 3
Asie du Sud et du Sud-Est 4
Océanie 5

Union européenne (EU27) 6
Autres marchés européens 7
Antilles 8
Amérique centrale 9
Amérique du Sud 10
Mexique.. 11
États-Unis d'Amérique 12
Pas d'autres/Je ne sais pas.. 99

PQ10

NOT FDI

Le tableau ci-dessous cerne plusieurs défis et obstacles auxquels les organisations font face lorsqu'elles recherchent des occasions d'affaires dans des marchés étrangers. Dans quelle mesure chacun des éléments suivants représente-t-il un obstacle pour votre organisation?

Q10A

NOT FDI

Valeur du dollar canadien
Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen.. 3
Obstacle/ défi majeur.. 4
Sans objet 9

Q10B

NOT FDI

Taxes ou permis d'exportation canadiens
Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen.. 3
Obstacle/ défi majeur.. 4
Sans objet 9

Q10C

NOT FDI

Incertitude en ce qui concerne les exigences réglementaires d'autres pays
Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen.. 3
Obstacle/ défi majeur.. 4
Sans objet 9

Q10D

NOT FDI

Traitement discriminatoire ou arbitraire envers les investisseurs ou investissements canadiens
Aucun obstacle/ défi 1

Obstacle/ défi mineur 2
Obstacle/ défi moyen 3
Obstacle/ défi majeur 4
Sans objet 9

Q10E

NOT FDI

Manque d'accès à du financement
Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen 3
Obstacle/ défi majeur 4
Sans objet 9

Q10F

NOT FDI

Inquiétude quant à la violation de vos brevets ou de vos droits de propriété intellectuelle
Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen 3
Obstacle/ défi majeur 4
Sans objet 9

Q10G

NOT FDI

Tarifs ou barrières commerciales à l'étranger
Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen 3
Obstacle/ défi majeur 4
Sans objet 9

Q10H

NOT FDI

Barrières linguistiques ou culturelles
Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen 3
Obstacle/ défi majeur 4
Sans objet 9

Q10I

NOT FDI

Disponibilité et compétences de la main-d'œuvre
Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen 3
Obstacle/ défi majeur 4
Sans objet 9

Q10J

NOT FDI

Corruption

Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen 3
Obstacle/ défi majeur 4
Sans objet 9

Q10K

NOT FDI

Occasions d'affaires insuffisantes à l'échelle internationale (c.-à-d. contact pour l'exportation)

Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen 3
Obstacle/ défi majeur 4
Sans objet 9

Q10L

NOT FDI

Manque de relations dans le marché, comme d'acheteurs et partenaires potentiels, de sources de technologie, d'intermédiaires, etc.

Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen 3
Obstacle/ défi majeur 4
Sans objet 9

Q10M

NOT FDI

Autres obstacles ou défis (PRÉCISEZ la nature de l'obstacle ou du défi)Q10BOX

Aucun obstacle/ défi 1
Obstacle/ défi mineur 2
Obstacle/ défi moyen 3
Obstacle/ défi majeur 4
Sans objet 9

PQ11

La prochaine section examine la mesure dans laquelle le Service des délégués commerciaux a aidé votre organisation à atteindre ses objectifs commerciaux dans son ou ses marchés cibles. Pour les questions suivantes, veuillez tenir compte de votre relation dans son ensemble avec le SDC, c'est-à-dire de l'effet combiné de toutes les interactions que vous avez eues avec le SDC depuis le 1er juillet 2011. Veuillez indiquer dans quelle mesure vous êtes en désaccord ou d'accord avec chacun des énoncés suivants quant à la contribution du SDC à vos efforts de développement d'affaires à l'échelle internationale.

Q11A

NOT FDI

Le SDC a aidé mon organisation...

à avoir plus de confiance pour explorer ou accroître ses activités dans un marché étranger
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3
D'accord... 4
Fortement d'accord 5
Je ne sais pas... 9

Q11B

NOT FDI

Le SDC a aidé mon organisation...

À avoir accès à des clients et partenaires qu'il aurait été difficile de joindre sans l'appui du SDC
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3
D'accord... 4
Fortement d'accord 5
Je ne sais pas... 9

Q11C

NOT FDI

Le SDC a aidé mon organisation...

à avoir accès à de l'information qu'il aurait été difficile d'obtenir sans l'appui du SDC
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3
D'accord... 4
Fortement d'accord 5
Je ne sais pas... 9

Q11D

NOT FDI

Le SDC a aidé mon organisation...

à surmonter ou éviter des obstacles liés à de nouvelles occasions d'affaires à l'étranger
Fortement en désaccord 1
En désaccord.. 2
Ni d'accord ni en désaccord 3
D'accord... 4
Fortement d'accord 5
Je ne sais pas... 9

Q11E

NOT FDI

Le SDC a aidé mon organisation...

à améliorer son profil et sa crédibilité dans des marchés étrangers
Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas 9

Q11F

NOT FDI

Le SDC a aidé mon organisation...

à améliorer ses connaissances de l'environnement concurrentiel dans ses marchés cibles
Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas 9

Q11G

NOT FDI

Le SDC a aidé mon organisation...

à améliorer sa stratégie marketing dans ses marchés cibles
Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas 9

Q11H

NOT FDI

Le SDC a aidé mon organisation...

à éviter les erreurs, délais ou coûts additionnels encourus dans la poursuite d'une occasion d'affaires
Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas 9

Q11I
NOT FDI
Le SDC a aidé mon organisation...

à obtenir et évaluer l'information sur le marché ou l'industrie qui l'a aidé à décider ou non de se lancer dans une occasion d'affaires
Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas 9

Q11J
NOT FDI
Le SDC a aidé mon organisation...

à améliorer notre capacité à régler des questions de réglementation ou d'autres obstacles non tarifaires liés au marché cible
Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas 9

Q11K
NOT FDI
Le SDC a aidé mon organisation...

à obtenir des renseignements et de l'aide relativement à la responsabilité sociale de l'entreprise
Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas 9

Q11L
FDI
Le SDC a aidé mon organisation...

à améliorer nos connaissances en matière d'occasions d'affaires au Canada
Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas 9

Q11M

FDI

Le SDC a aidé mon organisation...

à évaluer des régions canadiennes par rapport à d'autres endroits qui lui font concurrence à l'échelle internationale

Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas 9

Q11N

FDI

Le SDC a aidé mon organisation...

à prendre la décision finale quant à notre intention d'investir ou d'étendre nos opérations au Canada

Fortement en désaccord 1
En désaccord 2
Ni d'accord ni en désaccord 3
D'accord 4
Fortement d'accord 5
Je ne sais pas 9

Q12

NO SKIPS TO PQ23 & NOT FDI

Depuis le 1er juillet 2011, votre organisation a-t-elle poursuivi ou entrepris des négociations quant à une entente commerciale (p. ex. ventes, autorisation d'exploitation, investissement, innovation, approvisionnement, etc.) avec un partenaire commercial dans les marchés où vous aviez demandé de l'aide du SDC? Soyez assuré(e) que tous les renseignements que vous fournirez seront traités en toute confidentialité et que seuls des résultats globaux seront publiés dans le rapport.

Oui 1
Non 2
Sans objet 9

Q13

NO, DK SKIPS TO PQ23 & NOT FDI

Entre le 1er juillet 2011 et le 31 décembre 2012, votre organisation a-t-elle conclu (c.-à-d. signé) une nouvelle entente commerciale avec un ou des partenaires commerciaux étrangers dans les marchés pour lesquels vous aviez reçu de l'aide du SDC?

Oui 1
Non 2
Je ne sais pas 9

Q14

NO, DK, DECLINE SKIPS TO PQ23 & NOT FDI

Entre le 1er juillet 2011 et le 31 décembre 2012, votre organisation a-t-elle obtenu (ou contribué à obtenir) des résultats financiers dans des marchés pour lesquels vous aviez demandé de l'aide du SDC?

Oui 1
Non 2
Je ne sais pas........ 8
Refuse de répondre 9

Q15

NOT FDI

Quel type de résultats financiers avez-vous obtenus?

SÉLECTIONNEZ TOUTES LES RÉPONSES PERTINENTES
Exportation de biens 1
Exportation de services........ 2
Nouvel investissement direct au Canada 3
Expansion d'un investissement existant au Canada 4
Investissement à l'étranger qui a généré des revenus........ 5
Partenariat, une coentreprise ou une autre alliance qui a généré des revenus........ 6
Ventes affiliées à l'étranger 7
Licences de technologie 8
Attirer des investissements providentiels ou du capital de risque 9
Reprise des activités ou augmentation des ventes une fois que l'obstacle qui bloquait l'accès au marché est tombé........ 10
Autre (PRÉCISEZ)........ 77
Je ne sais pas........ 99

Q15APRE

EXPORT OF GOODS; NOT FDI

Q16A

EXPORT OF GOODS; NOT FDI

En vous référant spécifiquement à l'élément exportation de biens, quelle a été la valeur totale approximative de ces résultats financiers en dollars canadiens pour la période de publication de l'information financière la plus récente de votre organisation? Si elle comprenait des partenaires, veuillez indiquer la valeur pour votre organisation seulement.

Inscrivez le montant. Si vous n'êtes pas certain(e), à votre connaissance, s'agit-il de : 1
Moins de 10 000 $ 2
10 000 $ à moins de 25 000 $........ 3
25 000 $ à moins de 100 000 $........ 4
100 000 $ à moins de 1 million $ 5
1 million $ à moins de 2 millions $ 6
2 millions $ à moins de 5 millions $........ 7
5 millions $ à moins de 10 millions $........ 8
10 millions $ à moins de 50 millions $........ 9

50 millions $ à moins de 100 millions $ 10
100 millions $ ou plus 11
Je ne sais pas.... 98
Refuse.... 99

Q17A

EXPORT OF GOODS; NOT FDI

Dans quelle mesure la contribution du Service des délégués commerciaux a-t-elle permis d'atteindre ce résultat?

1 – Aucune contribution 1
2.... 2
3 – Contribution moyenne ou partielle 3
4.... 4
5 – Contribution essentielle 5
Je ne sais pas.... 9

Q18A

EXPORT OF GOODS; NOT FDI

Auriez-vous obtenu ces résultats financiers sans l'aide du SDC?

Oui 1
Oui, mais cela aurait pris plus de temps et de ressources ou les résultats financiers auraient été plus modestes 2
Non 3
Je ne sais pas.... 9

Q15BPRE

EXPORT OF SERVICES; NOT FDI

Q16B

EXPORT OF SERVICES; NOT FDI

En vous référant spécifiquement à l'élément exportation de services, quelle a été la valeur totale approximative de ces résultats financiers en dollars canadiens pour la période de publication de l'information financière la plus récente de votre organisation? Si elle comprenait des partenaires, veuillez indiquer la valeur pour votre organisation seulement.

Valeur totale : $. Si vous n'êtes certain(e), selon vous, est-ce que la valeur était de: 1
Moins de 10 000 $ 2
10 000 $ à moins de 25 000 $ 3
25 000 $ à moins de 100 000 $ 4
100 000 $ à moins de 1 million $ 5
1 million $ à moins de 2 millions $ 6
2 millions $ à moins de 5 millions $ 7
5 millions $ à moins de 10 millions $ 8
10 millions $ à moins de 50 millions $ 9
50 millions $ à moins de 100 millions $ 10
100 millions $ ou plus 11

Je ne sais pas 98
Refuse de répondre 99

Q17B

EXPORT OF SERVICES; NOT FDI

Dans quelle mesure la contribution du Service des délégués commerciaux a-t-elle permis d'atteindre ce résultat?

1 – Aucune contribution 1
2 2
3 – Contribution moyenne ou partielle 3
4 4
5 – Contribution essentielle 5
Je ne sais pas 9

Q18B

EXPORT OF SERVICES; NOT FDI

Auriez-vous obtenu ces résultats financiers sans l'aide du SDC?

Oui 1
Oui, mais cela aurait pris plus de temps et de ressources ou les résultats financiers auraient été plus modestes 2
Non 3
Je ne sais pas 9

Q15CPRE

New direct investment in Canada; NOT FDI

Q16C

New direct investment in Canada; NOT FDI

En vous référant spécifiquement à l'élément nouvel investissement direct au Canada, quelle a été la valeur totale approximative de ces résultats financiers en dollars canadiens pour la période de publication de l'information financière la plus récente de votre organisation? Si elle comprenait des partenaires, veuillez indiquer la valeur pour votre organisation seulement.

Valeur totale : $. Si vous n'êtes certain(e), selon vous, est-ce que la valeur était de: 1
Moins de 10 000 $ 2
10 000 $ à moins de 25 000 $ 3
25 000 $ à moins de 100 000 $ 4
100 000 $ à moins de 1 million $ 5
1 million $ à moins de 2 millions $ 6
2 millions $ à moins de 5 millions $ 7
5 millions $ à moins de 10 millions $ 8
10 millions $ à moins de 50 millions $ 9
50 millions $ à moins de 100 millions $ 10
100 millions $ ou plus 11
Je ne sais pas 98

Refuse de répondre 99

Q17C

New direct investment in Canada; NOT FDI

Dans quelle mesure la contribution du Service des délégués commerciaux a-t-elle permis d'atteindre ce résultat?

1 – Aucune contribution 1
2 2
3 – Contribution moyenne ou partielle 3
4 4
5 – Contribution essentielle 5
Je ne sais pas 9

Q18C

New direct investment in Canada; NOT FDI

Auriez-vous obtenu ces résultats financiers sans l'aide du SDC?

Oui 1
Oui, mais cela aurait pris plus de temps et de ressources ou les résultats financiers auraient été plus modestes 2
Non 3
Je ne sais pas 9

Q15DPRE

Expansion of existing investment in Canada; NOT FDI

Q16D

Expansion of existing investment in Canada; NOT FDI

En vous référant spécifiquement à l'élément expansion d'un investissement existant au Canada, quelle a été la valeur totale approximative de ces résultats financiers en dollars canadiens pour la période de publication de l'information financière la plus récente de votre organisation? Si elle comprenait des partenaires, veuillez indiquer la valeur pour votre organisation seulement.

Valeur totale : $. Si vous n'êtes certain(e), selon vous, est-ce que la valeur était de: 1
Moins de 10 000 $ 2
10 000 $ à moins de 25 000 $ 3
25 000 $ à moins de 100 000 $ 4
100 000 $ à moins de 1 million $ 5
1 million $ à moins de 2 millions $ 6
2 millions $ à moins de 5 millions $ 7
5 millions $ à moins de 10 millions $ 8
10 millions $ à moins de 50 millions $ 9
50 millions $ à moins de 100 millions $ 10
100 millions $ ou plus 11
Je ne sais pas 98
Refuse de répondre 99

Q17D

Expansion of existing investment in Canada; NOT FDI

Dans quelle mesure la contribution du Service des délégués commerciaux a-t-elle permis d'atteindre ce résultat?

1 – Aucune contribution 1
2 2
3 – Contribution moyenne ou partielle 3
4 4
5 – Contribution essentielle 5
Je ne sais pas 9

Q18D

Expansion of existing investment in Canada; NOT FDI

Auriez-vous obtenu ces résultats financiers sans l'aide du SDC?

Oui 1
Oui, mais cela aurait pris plus de temps et de ressources ou les résultats financiers auraient été plus modestes 2
Non 3
Je ne sais pas 9

Q15EPRE

INVESTMENT ABROAD LEADING TO REVENUE; NOT FDI

Q16E

INVESTMENT ABROAD LEADING TO REVENUE; NOT FDI

En vous référant spécifiquement à l'élément investissement à l'étranger qui a généré des revenus, quelle a été la valeur totale approximative de ces résultats financiers en dollars canadiens pour la période de publication de l'information financière la plus récente de votre organisation? Si elle comprenait des partenaires, veuillez indiquer la valeur pour votre organisation seulement.

Valeur totale : $. Si vous n'êtes certain(e), selon vous, est-ce que la valeur était de: 1
Moins de 10 000 $ 2
10 000 $ à moins de 25 000 $ 3
25 000 $ à moins de 100 000 $ 4
100 000 $ à moins de 1 million $ 5
1 million $ à moins de 2 millions $ 6
2 millions $ à moins de 5 millions $ 7
5 millions $ à moins de 10 millions $ 8
10 millions $ à moins de 50 millions $ 9
50 millions $ à moins de 100 millions $ 10
100 millions $ ou plus 11
Je ne sais pas 98
Refuse de répondre 99

Q17E

INVESTMENT ABROAD LEADING TO REVENUE; NOT FDI

Dans quelle mesure la contribution du Service des délégués commerciaux a-t-elle permis d'atteindre ce résultat?

1 – Aucune contribution 1
2 2
3 – Contribution moyenne ou partielle 3
4 4
5 – Contribution essentielle 5
Je ne sais pas 9

Q18E

INVESTMENT ABROAD LEADING TO REVENUE; NOT FDI

Auriez-vous obtenu ces résultats financiers sans l'aide du SDC?

Oui 1
Oui, mais cela aurait pris plus de temps et de ressources ou les résultats financiers auraient été plus modestes 2
Non 3
Je ne sais pas 9

Q15FPRE

Partnership, joint venture or other alliance leading to revenue; NOT FDI

Q16F

Partnership, joint venture or other alliance leading to revenue; NOT FDI

En vous référant spécifiquement à l'élément partenariat, une coentreprise ou une autre alliance qui a généré des revenus, quelle a été la valeur totale approximative de ces résultats financiers en dollars canadiens pour la période de publication de l'information financière la plus récente de votre organisation? Si elle comprenait des partenaires, veuillez indiquer la valeur pour votre organisation seulement.

Valeur totale : $. Si vous n'êtes certain(e), selon vous, est-ce que la valeur était de: 1
Moins de 10 000 $ 2
10 000 $ à moins de 25 000 $ 3
25 000 $ à moins de 100 000 $ 4
100 000 $ à moins de 1 million $ 5
1 million $ à moins de 2 millions $ 6
2 millions $ à moins de 5 millions $ 7
5 millions $ à moins de 10 millions $ 8
10 millions $ à moins de 50 millions $ 9
50 millions $ à moins de 100 millions $ 10
100 millions $ ou plus 11
Je ne sais pas 98
Refuse de répondre 99

Q17F

Partnership, joint venture or other alliance leading to revenue; NOT FDI

Dans quelle mesure la contribution du Service des délégués commerciaux a-t-elle permis d'atteindre ce résultat?

1 – Aucune contribution 1
2 2
3 – Contribution moyenne ou partielle 3
4 4
5 – Contribution essentielle 5
Je ne sais pas........ 9

Q18F

Partnership, joint venture or other alliance leading to revenue; NOT FDI

Auriez-vous obtenu ces résultats financiers sans l'aide du SDC?

Oui 1
Oui, mais cela aurait pris plus de temps et de ressources ou les résultats financiers auraient été plus modestes 2
Non 3
Je ne sais pas........ 9

Q15GPRE

Foreign affiliate sales; NOT FDI

Q16G

Foreign affiliate sales; NOT FDI

En vous référant spécifiquement à l'élément ventes affiliées à l'étranger, quelle a été la valeur totale approximative de ces résultats financiers en dollars canadiens pour la période de publication de l'information financière la plus récente de votre organisation? Si elle comprenait des partenaires, veuillez indiquer la valeur pour votre organisation seulement.

Valeur totale : $. Si vous n'êtes certain(e), selon vous, est-ce que la valeur était de: 1
Moins de 10 000 $ 2
10 000 $ à moins de 25 000 $ 3
25 000 $ à moins de 100 000 $ 4
100 000 $ à moins de 1 million $ 5
1 million $ à moins de 2 millions $ 6
2 millions $ à moins de 5 millions $ 7
5 millions $ à moins de 10 millions $ 8
10 millions $ à moins de 50 millions $ 9
50 millions $ à moins de 100 millions $ 10
100 millions $ ou plus 11
Je ne sais pas........ 98
Refuse de répondre 99

Q17G

Foreign affiliate sales; NOT FDI

Dans quelle mesure la contribution du Service des délégués commerciaux a-t-elle permis d'atteindre ce résultat?

1 – Aucune contribution 1
2 2
3 – Contribution moyenne ou partielle 3
4 4
5 – Contribution essentielle 5
Je ne sais pas 9

Q18G

Foreign affiliate sales; NOT FDI

Auriez-vous obtenu ces résultats financiers sans l'aide du SDC?

Oui 1
Oui, mais cela aurait pris plus de temps et de ressources ou les résultats financiers auraient été plus modestes 2
Non 3
Je ne sais pas 9

Q15HPRE

Licensing of technology; NOT FDI

Q16H

Licensing of technology; NOT FDI

En vous référant spécifiquement à l'élément licences de technologie, quelle a été la valeur totale approximative de ces résultats financiers en dollars canadiens pour la période de publication de l'information financière la plus récente de votre organisation? Si elle comprenait des partenaires, veuillez indiquer la valeur pour votre organisation seulement.

Valeur totale : $. Si vous n'êtes certain(e), selon vous, est-ce que la valeur était de: 1
Moins de 10 000 $ 2
10 000 $ à moins de 25 000 $ 3
25 000 $ à moins de 100 000 $ 4
100 000 $ à moins de 1 million $ 5
1 million $ à moins de 2 millions $ 6
2 millions $ à moins de 5 millions $ 7
5 millions $ à moins de 10 millions $ 8
10 millions $ à moins de 50 millions $ 9
50 millions $ à moins de 100 millions $ 10
100 millions $ ou plus 11
Je ne sais pas 98
Refuse de répondre 99

Q17H

Licensing of technology; NOT FDI

Dans quelle mesure la contribution du Service des délégués commerciaux a-t-elle permis d'atteindre ce résultat?

1 – Aucune contribution 1
2 2
3 – Contribution moyenne ou partielle 3
4 4
5 – Contribution essentielle 5
Je ne sais pas 9

Q18H

Licensing of technology; NOT FDI

Auriez-vous obtenu ces résultats financiers sans l'aide du SDC?

Oui 1
Oui, mais cela aurait pris plus de temps et de ressources ou les résultats financiers auraient été plus modestes 2
Non 3
Je ne sais pas 9

Q15IPRE

Attracting angel investors or venture capital; NOT FDI

Q16I

Attracting angel investors or venture capital; NOT FDI

En vous référant spécifiquement à l'élément attirer des investissements providentiels ou du capital de risque, quelle a été la valeur totale approximative de ces résultats financiers en dollars canadiens pour la période de publication de l'information financière la plus récente de votre organisation? Si elle comprenait des partenaires, veuillez indiquer la valeur pour votre organisation seulement.

Valeur totale : $. Si vous n'êtes certain(e), selon vous, est-ce que la valeur était de: 1
Moins de 10 000 $ 2
10 000 $ à moins de 25 000 $ 3
25 000 $ à moins de 100 000 $ 4
100 000 $ à moins de 1 million $ 5
1 million $ à moins de 2 millions $ 6
2 millions $ à moins de 5 millions $ 7
5 millions $ à moins de 10 millions $ 8
10 millions $ à moins de 50 millions $ 9
50 millions $ à moins de 100 millions $ 10
100 millions $ ou plus 11
Je ne sais pas 98
Refuse de répondre 99

Q17I

Attracting angel investors or venture capital; NOT FDI

Dans quelle mesure la contribution du Service des délégués commerciaux a-t-elle permis d'atteindre ce résultat?

1 – Aucune contribution 1
2 2
3 – Contribution moyenne ou partielle 3
4 4
5 – Contribution essentielle 5
Je ne sais pas 9

Q18I

Attracting angel investors or venture capital; NOT FDI

Auriez-vous obtenu ces résultats financiers sans l'aide du SDC?

Oui 1
Oui, mais cela aurait pris plus de temps et de ressources ou les résultats financiers auraient été plus modestes 2
Non 3
Je ne sais pas 9

Q15JPRE

Derived from the resumption or increase in sales after the pre-existing barrier to market access was removed; NOT FDI

Q16J

Derived from the resumption or increase in sales after the pre-existing barrier to market access was removed; NOT FDI

En vous référant spécifiquement à l'élément reprise des activités ou augmentation des ventes une fois que l'obstacle qui bloquait l'accès au marché est tombé, quelle a été la valeur totale approximative de ces résultats financiers en dollars canadiens pour la période de publication de l'information financière la plus récente de votre organisation? Si elle comprenait des partenaires, veuillez indiquer la valeur pour votre organisation seulement.

Valeur totale : $. Si vous n'êtes certain(e), selon vous, est-ce que la valeur était de: 1
Moins de 10 000 $ 2
10 000 $ à moins de 25 000 $ 3
25 000 $ à moins de 100 000 $ 4
100 000 $ à moins de 1 million $ 5
1 million $ à moins de 2 millions $ 6
2 millions $ à moins de 5 millions $ 7
5 millions $ à moins de 10 millions $ 8
10 millions $ à moins de 50 millions $ 9
50 millions $ à moins de 100 millions $ 10
100 millions $ ou plus 11
Je ne sais pas 98

Refuse de répondre 99

Q17J

Derived from the resumption or increase in sales after the pre-existing barrier to market access was removed; NOT FDI

Dans quelle mesure la contribution du Service des délégués commerciaux a-t-elle permis d'atteindre ce résultat?

1 – Aucune contribution 1
2 2
3 – Contribution moyenne ou partielle 3
4 4
5 – Contribution essentielle 5
Je ne sais pas 9

Q18J

Derived from the resumption or increase in sales after the pre-existing barrier to market access was removed; NOT FDI

Auriez-vous obtenu ces résultats financiers sans l'aide du SDC?

Oui 1
Oui, mais cela aurait pris plus de temps et de ressources ou les résultats financiers auraient été plus modestes 2
Non 3
Je ne sais pas 9

Q15KPRE

OTHER; NOT FDI

Q16K

OTHER; NOT FDI

En vous référant spécifiquement à l'élément <Q15>, quelle a été la valeur totale approximative de ces résultats financiers en dollars canadiens pour la période de publication de l'information financière la plus récente de votre organisation? Si elle comprenait des partenaires, veuillez indiquer la valeur pour votre organisation seulement.

Valeur totale : $. Si vous n'êtes certain(e), selon vous, est-ce que la valeur était de: 1
Moins de 10 000 $ 2
10 000 $ à moins de 25 000 $ 3
25 000 $ à moins de 100 000 $ 4
100 000 $ à moins de 1 million $ 5
1 million $ à moins de 2 millions $ 6
2 millions $ à moins de 5 millions $ 7
5 millions $ à moins de 10 millions $ 8
10 millions $ à moins de 50 millions $ 9
50 millions $ à moins de 100 millions $ 10
100 millions $ ou plus 11
Je ne sais pas 98

Refuse de répondre 99

Q17K

OTHER; NOT FDI

Dans quelle mesure la contribution du Service des délégués commerciaux a-t-elle permis d'atteindre ce résultat?

1 – Aucune contribution 1
2 2
3 – Contribution moyenne ou partielle 3
4 4
5 – Contribution essentielle 5
Je ne sais pas 9

Q18K

OTHER; NOT FDI

Auriez-vous obtenu ces résultats financiers sans l'aide du SDC?

Oui 1
Oui, mais cela aurait pris plus de temps et de ressources ou les résultats financiers auraient été plus modestes 2
Non 3
Je ne sais pas 9

Q19

NO, NA, DK, DECLINE SKIP TO Q21 & NOT FDI

Est-ce que la conclusion de nouvelles ventes/ententes de partenariat avec des partenaires commerciaux à l'étranger dans les marchés où vous aviez profité de l'aide du SDC a mené à un changement de la taille des effectifs de votre organisation au Canada?

Oui 1
Non 2
Sans objet 7
Je ne sais pas 8
Refuse de répondre 9

Q20PRE

NOT FDI

Q20A

NOT FDI

Laquelle des options suivantes décrit le mieux le changement de taille estimé des effectifs de votre organisation au Canada?

PRÉCISEZ la nature du changement
Augmentation 1
Diminution 2
Je ne sais pas/Refuse de répondre 9

Q20B

NOT FDI

Inscrivez le pourcentage estimé du changement de taille des effectifs 1
Je ne sais pas/Refuse de répondre 999

Q21

NO, NA, DK, DECLINE SKIP TO PQ23& NOT FDI

Est-ce que la conclusion de nouvelles ventes/ententes de partenariat avec des partenaires commerciaux à l'étranger dans des marchés où vous aviez profité de l'aide du SDC a mené à un transfert de nouvelles technologies?

Oui 1
Non 2
Sans objet 7
Je ne sais pas 8
Refuse de répondre 9

Q22

NOT FDI

Quels transferts de nouvelles technologies ont eu lieu suite à la conclusion de nouvelles ventes/ententes de partenariat avec les partenaires commerciaux à l'étranger?

SÉLECTIONNEZ TOUTES LES RÉPONSES PERTINENTES
Circulation de nouvelles technologies du partenaire étranger vers le Canada 1
Circulation de nouvelles technologies du Canada vers le partenaire étranger 2
La mise sur pied de programmes communs de recherche et développement 3
Autre 77
Je ne sais pas .... 99 X

PQ23

Du 1er juillet 2011 au 31 décembre 2012, est-ce que votre organisation a-t-elle lancé...

Q23A

des biens nouveaux ou considérablement améliorés? (excluez la simple revente de biens achetés à d'autres organisations et les modifications à la nature esthétique des biens)?
Oui 1
Non 2

Q23B

des services nouveaux ou considérablement améliorés?
Oui 1
Non 2

Q23C

des méthodes de fabrication ou de production de biens ou services nouvelles ou considérablement améliorées?
Oui 1
Non 2

Q24A

NEW OR SIGNIFICANTLY IMPROVED GOODS

Est-ce que ces biens nouveaux ou considérablement améliorés ont été lancés...

à l'échelle nationale?.. 1
à l'échelle internationale 2
Les deux 3

Q24B

NEW OR SIGNIFICANTLY IMPROVED SERVICES

Est-ce que ces services nouveaux ou considérablement améliorés ont été lancés...

à l'échelle nationale?.. 1
à l'échelle internationale 2
Les deux 3

Q24C

NEW OR SIGNIFICANTLY IMPROVED METHODS OF MANUFACTURING OR PRODUCING GOODS OR SERVICES

Est-ce que ces méthodes de fabrication ou de production de biens ou services nouvelles ou considérablement améliorées ont été lancées...

à l'échelle nationale?.. 1
à l'échelle internationale 2
Les deux 3

Q25

YES, Q23A, B or C

Dans quelle mesure la contribution des services offerts par le Service des délégués commerciaux dont a profité votre organisation a-t-elle été importante par rapport aux biens, aux services ou aux méthodes de fabrication ou de production que vous avez lancés?

1 – Aucune contribution 1
2... 2
3 – Contribution moyenne ou partielle 3
4... 4
5 – Contribution essentielle 5
Je ne sais pas.. 9

PQ26

En vous fondant sur l'expérience que vous avez vécue avec le SDC depuis le 1er juillet 2011...

Q26V1

HALF SAMPLE

Dans quelle mesure est-il probable que vous recommandiez les services du SDC à un collègue ou un collaborateur?

Tout à fait improbable 1
Plutôt improbable 2
Probable.. 3
Assez probable 4
Tout à fait probable 5
Je ne sais pas.. 99

Q26B

Dans quelle mesure est-il probable que vous ayez de nouveau recours aux services du SDC?

Tout à fait improbable 1
Plutôt improbable 2
Probable.. 3
Assez probable 4
Tout à fait probable 5
Je ne sais pas.. 99

Q26V2

HALF SAMPLE

En vous fondant sur l'expérience que vous avez vécue avec le SDC depuis le 1er juillet 2011, dans quelle mesure est-il probable que vous recommandiez les services du SDC à un collègue ou un collaborateur?

Extrêmement improbable 1 1
2.. 2
3.. 3
4.. 4
5.. 5
6.. 6
7.. 7
8.. 8
9.. 9
Extrêmement probable 1.. 10
Je ne sais pas.. 99

Q27

Comment évalueriez-vous votre taux de satisfaction global par rapport aux services et aux conseils que vous a fournis le SDC dans le cadre de toutes vos interactions depuis le 1er juillet 2011?

Très insatisfait(e) 1 1
2.. 2
3.. 3
4.. 4
Très satisfait(e) 5 5
Je ne sais pas.. 9

Q28

NO, DK, DECLINE SKIP TO Q30

Votre organisation a-t-elle profité d'un service offert par un autre organisme canadien de soutien au commerce international ou une autre organisation provinciale, territoriale ou municipale œuvrant dans le milieu du développement économique entre le 1er juillet 2011 et le 31 décembre 2012?

Oui 1
Non 2
Je ne sais pas 8
Refuse de répondre 9

PQ29

Finalement, nous aimerions que vous pensiez à tout service offert par un autre organisme canadien de soutien au commerce international (p. ex. un autre ministère du gouvernement fédéral, Exportation et développement Canada, Banque de développement du Canada, Corporation commerciale canadienne) ou une autre organisation provinciale, territoriale ou municipale œuvrant dans le milieu du développement économique dont votre organisation a profité entre le 1er juillet 2011 et le 31 décembre 2012. Veuillez comparer le service que vous a offert cet organisme ou cette organisation avec le plus récent service du SDC dont a profité votre organisation pendant la même période. Comment compareriez-vous les services dans les domaines suivants?

Q29A

Qualité du service
L'autre organisation a fait bien mieux 1
L'autre organisation a fait un peu mieux 2
Plus ou moins égal 3
Le SDC a fait un peu mieux 4
Le SDC a fait bien mieux 5
Je ne sais pas 6
Je ne peux les comparer/Sans objet 7

Q29B

Rapidité d'exécution du service
L'autre organisation a fait bien mieux 1
L'autre organisation a fait un peu mieux 2
Plus ou moins égal 3
Le SDC a fait un peu mieux 4
Le SDC a fait bien mieux 5
Je ne sais pas 6
Je ne peux les comparer/Sans objet 7

Q29C

Incidence générale du service sur votre organsiation
L'autre organisation a fait bien mieux 1
L'autre organisation a fait un peu mieux 2

Plus ou moins égal.. 3
Le SDC a fait un peu mieux 4
Le SDC a fait bien mieux 5
Je ne sais pas.. 6
Je ne peux les comparer/Sans objet 7

Q29D

Satisfaction globale envers le service
L'autre organisation a fait bien mieux 1
L'autre organisation a fait un peu mieux 2
Plus ou moins égal.. 3
Le SDC a fait un peu mieux 4
Le SDC a fait bien mieux 5
Je ne sais pas.. 6
Je ne peux les comparer/Sans objet 7

Q30

La collecte de certains renseignements sur votre organisation nous aidera à analyser les résultats du sondage. Tous les renseignements recueillis dans le cadre du sondage seront présentés sous forme de données globales. Tous les renseignements individuels et commerciaux de l'organisation seront traités en toute confidentialité. Combien d'employés travaillent pour votre organisation? Veuillez inclure les employés de tous les emplacements de votre organisation.

1 – 9.. 1
10 – 49.. 2
50 – 99.. 3
100 – 499.. 4
500 – 999.. 5
1000 ou plus 6
Je ne sais pas.. 98
Refuse de répondre 99

Q31

Quels ont été les ventes et revenus totaux de votre organisation à l'échelle mondiale (y compris les ventes nationales) en dollars canadiens pour l'exercice financier le plus récent de votre organisation?

Moins de 250 000 $ 1
250 000 $ à moins de 1 million $ 2
1 million $ à moins de 5 millions $ 3
5 millions $ à moins de 25 millions $.. 4
25 millions $ ou plus 5
Sans objet 97
Refuse de répondre 98
Je ne sais pas.. 99

Q32

Veuillez indiquer l'endroit où la société mère ultime internationale de votre organisation est situé? Le siège social est-il situé :

Au Canada 1
Aux États-Unis 2
Au Mexique ou en Amérique centrale (y compris dans les Antilles) 3
En Amérique du Sud 4
En Europe 5
En Asie 6
Au Moyen-Orient 7
En Afrique 8
Refuse de répondre 99

Q33

Veuillez nous faire part de tout commentaire ou toute suggestion sur les façons dont le SDC pourrait améliorer la qualité de ses produits et services pour répondre aux besoins en constante évolution de votre organisation.

Commentaires supplémentaires	77	
Aucun autre commentaire	99	X
1	1	I
2	2	I
3	3	I
4	4	I
5	5	I

QEND

1 1

THNK

MERCI D'AVOIR PRIS LE TEMPS DE RÉPONDRE À CE SONDAGE. Le sondage a été envoyé avec success.

Les résultats globaux seront disponibles cet été au :
www.deleguescommerciaux.gc.ca/fra/document.jsp?did=140716.

THNK2

Merci de votre collaboration! D'après les renseignements que vous avez donnés, vous n'êtes malheureusement pas admissible à ce sondage.