Global Affairs Canada
Affaires mondiales Canada

2019 Trade Commissioner Service Client Satisfaction Research

Final Report

Prepared for Global Affairs Canada

Supplier: EKOS RESEARCH ASSOCIATES INC.
Contract Number: 08170-180411/001/CY
Contract Value: $91,329.71 (including HST)
Award Date: December 28, 2018
Delivery Date: March 30, 2019

Registration Number: POR 092-18
For more information on this report, please contact Public Services and Procurement Canada at tpsgc.questions-questions.pwgsc@tpsgc-pwgsc.gc.ca

Ce rapport est aussi disponible en français

Government of Canada Gouvernement du Canada
Canada

2019 Trade Commissioner Service Customer Satisfaction Research
Final Report

Prepared for Global Affairs Canada
Supplier name: **EKOS RESEARCH ASSOCIATES INC.**
Date: March 30, 2019

This public opinion research report presents the results of an online survey and one-on one interviews conducted by EKOS Research Associates Inc. on behalf of Global Affairs Canada. The research study was conducted with 2,965 clients of TCS in March 2019.

Cette publication est aussi disponible en français sous le titre Étude sur la satisfaction de la clientèle du Service des délégués commerciaux du Canada 2019.

Communications Branch
Public Services and Procurement Canada
Portage III Tower A
16A1-11 Laurier Street
Gatineau QC K1A 0S5

Catalogue Number:
FR5-160/2019E-PDF

International Standard Book Number (ISBN):
978-0-660-30926-2

Related publications (registration number: **092-18)**

Catalogue Number FR5-160/2019F-PDF- (Final Report, French)
ISBN 978-0-660-30927-9

EKOS RESEARCH ASSOCIATES

Contact: Will Daley

Ottawa Office
359 Kent Street, Suite 300
Ottawa, Ontario
K2P 0R6
Tel: (613) 235 7215
Fax: (613) 235 8498
E-mail: pobox@ekos.com

www.ekos.com

TABLE OF CONTENTS

LIST OF TABLES

LIST OF CHARTS

SUMMARY

Key findings from the Quantitative Research

Consistent with the 2013 research, the findings of this year's survey research show that a very high proportion of TCS clients are happy with the service and information they have received. Specifically, the results find that at least four in five clients…

- Say they are satisfied with the service and advice provided by TCS (80% compared to 83% in 2013);
- Say they would definitely or probably recommend TCS to a colleague (83% compared to 86% in 2013); and,
- Say they would definitely or probably use the services of TCS again in the future (85% compared to 86% in 2013).

Only five percent of respondents or fewer describe themselves as dissatisfied or say they are unlikely to recommend TCS or use its services in the future.

Aspects of the Client Experience

The core aspects of service which clients most often associate with TCS include the belief that staff understands clients' business (80%), that TCS provides a consistent quality of service (76%) and that they obtained useful intelligence on market conditions from TCS (76%).

Seven in ten respondents say it took a reasonable amount of time to get what they needed from TCS (69%), although timeliness did not emerge as a particularly important or commonly mentioned aspect of TCS service. Few participants pointed to examples of time-sensitive issues compelling them to reach out to TCS. This is reflected in the survey result showing that most participants approach TCS for basic information about doing business in a market (61%) or for support on sales and marketing efforts (48%), but fewer clients say they bring time-sensitive issues to TCS (25%). A similar proportion says that TCS staff provided appropriate contacts when they could not provide direct assistance (66%), and, more generally, that TCS provided contacts to the right people with whom to do business (70%).

Two in three clients say TCS provided them with useful intelligence on local companies and organizations (69%), while just over three in five say they were provided with intelligence that helped solve problems (62%) or intelligence on opportunities and potential difficulties they could encounter (62%).

Reasons for Contacting TCS

About four in five clients say they need a great deal or at least some assistance with market intelligence (83%), referrals to international business opportunities or sales leads (79%) and information on local companies or organizations of note (79%).

Other areas where most clients say they need assistance include: getting recommendations on trade fairs or trade missions (72%); getting help with understanding responsible business practices abroad (66%); and, getting referrals to relevant programs and services available to their business (62%).

Half of clients or fewer say they need a great deal or some assistance with advice on planning a trip (51%), referrals to professional service providers (50%), support on intellectual property (IP) rights and dealings with local governments (48%), referrals to technology or R&D-related partnerships (47%) or information on locating financial assistance (45%).

In nearly all of the areas tested, significantly greater proportions of clients this year say they need assistance than in 2013 or 2009. In only two areas tested do similar proportions of clients express a need for assistance as they had in 2013: obtaining information on local companies or organizations (79% vs. 74% in 2013) and support on IP rights and government affairs (48% vs. 46% in 2013). In every other area tested, clients are at least 10 percentage points more likely to say they need assistance this year than in the earlier years' research.

Client Outcomes

A sizeable proportion of clients say TCS made a substantial contribution to their efforts in the markets where they requested assistance. In particular, clients say that TCS made important or essential contributions by helping to remove market barriers (44%), helping clients establish revenue-generating partnerships (41%) and with sales through foreign affiliates (39%) as well as the export of goods and services (32% each). In each of the same areas, between half and two in three clients say the activities would have taken longer, cost more money to realize or never would have happened at all without the assistance of the TCS.

Clients were also asked about financial outcomes from activities in markets where they received assistance from TCS. Just over one in four clients who were assisted with new direct investments in their organization say that the assistance TCS provided was worth $500,000 or more in annual revenue (27%). Just over one in five clients who were helped by the removal of a market barrier (22%) or who secured revenue-generating investments from abroad (21%) say that TCS' assistance was worth at least $500,000 annually.

When asked whether TCS helped them by providing several different types of service, three in five say that TCS helped by providing intelligence and information they could not have received elsewhere (62%). Similar proportions say that TCS helped provide contacts they would not have otherwise found (58%), explore or expand in a foreign market (58%), improve their organizations' profile and credibility (58%) and improve their knowledge about the competitive environment in a market (56%).

However, while fewer clients say that TCS helped them in several areas, this does not necessarily mean the assistance TCS provides in the area is not valuable. Indeed, clients were less likely to say that TCS helped them overcome a market barrier (44%). However, we also find that clients who received assistance with the removal of a market barrier were most likely to say that TCS made a major contribution and had a meaningful impact on their efforts, and that the removal of a barrier led to $500,000 or more in annual revenue.

Of a similar nature, we find that clients less often say that TCS helped them address regulatory challenges (35%) or helped on matters related to corporate social responsibility (25%). However, when asked about obstacles to trade their organizations face, a majority of clients say uncertain regulatory requirements pose significant obstacles (54%).

Market Diversification

Three in five clients (60%) say they export goods and services to the United States and to other foreign markets. An additional one in five (19%) say they export goods and services to foreign markets other than the United States.

Most participants (60%) identify the United States as one of their three largest export markets. China follows distantly, with 26% mentioning it as a top three market. The United Kingdom ranks in third place, with 16% naming it as one of their top three markets. When asked which markets they expect to grow the fastest in the three years ahead, participants again mention the United States most often (43%), followed distantly by China (26%); meanwhile, India (13%), the United Kingdom (13%) and Mexico (12%) trail further behind.

On a regional basis, the United States again comes out as the largest export market for the greatest number of clients (60%), followed by East and Southeast Asia (40%) and Western Europe. With respect to the fastest growing regions, the United States and East/Southeast Asia are tied, with 43% of respondents mentioning each market among the ones they expect to grow the fastest. Only the United States and Western Europe (with the oldest and best established trading relationships with Canada) are more often identified as large export markets than as markets expected to grow quickly over the next three years.

Support from Other Trade Promotion Organizations

When asked which of several other trade promotion organizations provided their organizations with support in the past two years, respondents most often said they received support from provincial government bodies (36%) or from the EDC (35%). The Business Development Bank of Canada (BDC) comes in a distant third place (16%), followed by the Canadian Commercial Corporation (CCC) at six percent. Overall, more than two in three clients (68%) say they have received support from trade promotion organizations other than TCS in the past two years.

When asked to rate the effectiveness of TCS services in comparison to other organizations they have received support from, clients are more likely to say that TCS was more effective in terms of the services provided overall (45%) and also in terms of the timeliness of the service provided (45%) than to say the impact of service on their organizations was “neutral” or roughly the same as the services received from other organizations. Few respondents (4% in each case) say that TCS provided services that were less effective than another organization.

Key findings from the Qualitative Research

From interview participants the TCS is seen in generally positive terms, with the majority of clients describing it as an important, even essential, resource when addressing issues in foreign markets, obtaining assistance in the formative stages of an international foray, and accessing programs and services offered by the Government of Canada and other multi-national government organizations, such as the United Nations and the World Bank Group. In particular, TCS was described as providing helpful information to clients new to international trade who wish to expand their business into the United States. Satisfaction is particularly high among participants who are in the planning or early implementation phase of an international expansion.

Satisfaction varies significantly depending on the degree of specialization of each participant. Those most satisfied with the usefulness of the information they received often export packaged or agricultural goods, while this is less likely among highly specialized firms. Most participants working in specialized markets – particularly those with more experience – expressed understanding, however, that TCS may not be well-acquainted with the specific players or circumstances in their industry. Nonetheless, some held higher expectations, suggesting that TCS should provide more extensive assistance and should have greater expertise with the operations of governments in their markets, particularly on matters related to government contracting and procurement.

TCS staff was generally viewed in positive terms and participants frequently used adjectives like “helpful,” “engaged,” “attentive,” and “genial” or “friendly” in their descriptions. Some participants suggested that the quality of service can vary depending on the experience of individual staff members and emphasized the need for more follow-up.

In general, participants described TCS as offering them credibility in the marketplace (if not necessarily influence), particularly in dealings with foreign governments. In most cases, participants said this was a key benefit for them.

The contract value for the POR project is $91,329.71 (including HST).

Supplier Name: EKOS Research Associates
PWGSC Contract Number: 08170-180411/001/CY
Contract Award Date: December 28, 2018
To obtain more information on this study, please e-mail tpsgc.questions-questions.pwgsc@tpsgc-pwgsc.gc.ca

POLITICAL NEUTRALITY CERTIFICATION

I hereby certify as Senior Officer of EKOS Research Associates Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research.

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signed:

Will Daley
Vice President
EKOS Research Associates, Inc.

1. INTRODUCTION

Background and Objectives

The Trade Commissioner Service (TCS) is a service offered by Global Affairs Canada (GAC) 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, 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.

TCS commissioned EKOS Research Associates to conduct quantitative and qualitative research among its clients. The research was designed to gauge the client satisfaction and more clearly understand the sorts of TCS service and information that clients' value.

Methodology

Two phases of research were conducted to deliver on the objectives: an initial phase of survey research, followed by key informant interviews with 40 clients who answered the survey.

The survey research was conducted among a sample of n=2965 clients of the TCS who were identified through a contact list maintained by TCS. The survey required 15 minutes to complete (on average) and was conducted between March 5 and March 27, 2019. A response rate of 11.1% was obtained from the initial sample of 26,718 initial samples (see Appendix A for details related to methodology, response rate calculation and potential for response bias). The sample of n=2965 obtains a +/-1.8 percentage point margin of error (calculated at a 95% confidence interval).

The qualitative research consisted of one-on-one interviews conducted by telephone among 40 survey respondents. Each interview took between a half hour and 45 minutes to complete. The questions included in the interview guide were primarily open-ended in nature in order to have the participants clarify key study issues in their own words and drawing on their experiences with TCS. The interview participants were selected from the sample of respondents to reflect a lower level of satisfaction with TCS than was realized in the aggregate results among all respondents.

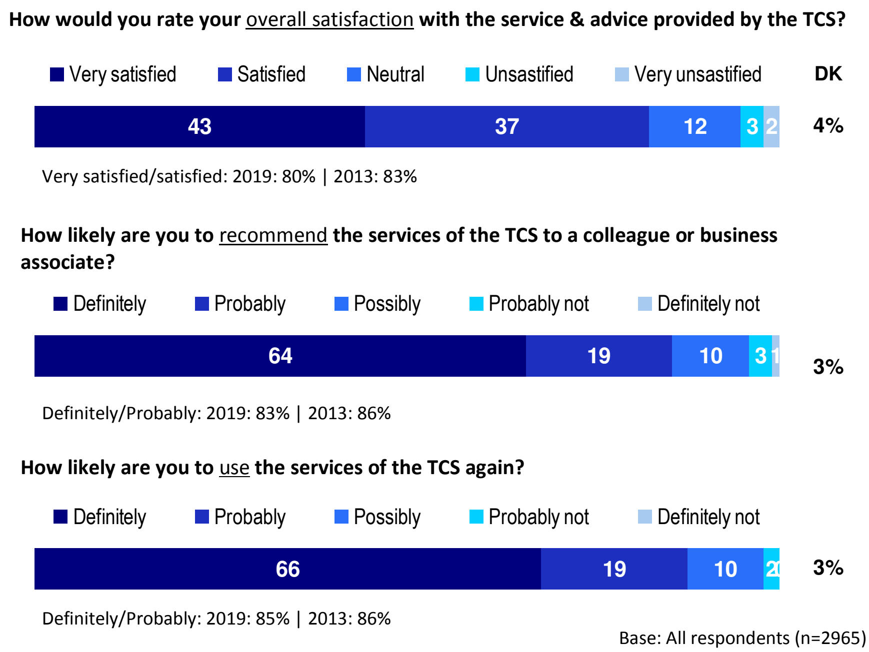
Please note that while the quantitative data provide a statistically representative means of reporting on the satisfaction and attitudes of TCS clients, the qualitative interviews are a non-random exercise that focusing on discourse and anecdotal experiences which – by design – are not reflective of the entire population.

2. Detailed Survey Findings

2.1 Satisfaction with and Enthusiasm for TCS

Four in five clients describe themselves as very satisfied or satisfied with the service and advice provided by TCS (80%). Similarly, over four in five say they would definitely, or probably recommend TCS to a colleague (83%) and they would definitely or probably use the services of TCS in the future (86%). In each case, just five percent of respondents or fewer describe themselves as dissatisfied or say they are unlikely to recommend TCS or use its services in the future[1]. These findings have changed little in comparison to 2013.

Chart 1: Overall Satisfaction, Likelihood to Recommend and Likelihood of Future Use



[1] Throughout the report, DK indicates "Don't know". Also note that results in some charts or tables may add to 99% or 101% due to rounding.

Those more likely than average to be satisfied (“very satisfied” or “satisfied”) with TCS include:

- Canadian Subsidiaries Abroad (86%);
- Large Organizations (87%); and,
- Partner Institutions (86%).

Table 1: Variation in Satisfaction

--	n=	Dissatisfied (1-2)	Satisfied (4-5)
Total 2019	2965	4%	80%
Total 2013	1222	6%	83%
Total 2009	1449	13%	66%

*Table 1a: How would you rate your overall satisfaction with the service and advice provided by the TCS – **Service Type***

--	n=	Dissatisfied (1-2)	Satisfied (4-5)
Problem solving	150	4%	83%
Qualified contacts	1121	5%	81%
Market potential	627	5%	81%
Preparing for international markets	392	5%	78%
Additional service	199	4%	84%
Referral	474	3%	79%

*Table 1b: How would you rate your overall satisfaction with the service and advice provided by the TCS – **Business Line***

--	n=	Dissatisfied (1-2)	Satisfied (4-5)
International Business Development	2714	5%	80%
Science, Tech & Information	206	4%	83%
Foreign Direct Investment	43	2%	88%

Table 1c: Region

--	n=	Dissatisfied (1-2)	Satisfied (4-5)
BC	514	4%	81%
Alberta	334	4%	80%
Manitoba/Saskatchewan	134	7%	79%
Ontario	1014	6%	79%

--	n=	Dissatisfied (1-2)	Satisfied (4-5)
Quebec	531	4%	79%
Atlantic	256	4%	84%
Outside of Canada	180	3%	86%

Table 1d: Number of employees

--	n=	Dissatisfied (1-2)	Satisfied (4-5)
SME	2222	5%	79%
Large	435	2%	87%
Partner	232	3%	86%

Table 1e: Largest Region (Based on $ Value)

--	n=	Dissatisfied (1-2)	Satisfied (4-5)
North America	1404	5%	79%
Latin American & Caribbean	578	4%	83%
Western & Eastern Europe	957	5%	80%
African & Middle East	749	5%	80%
South & East Asia	1049	5%	82%
Oceania	259	5%	78%

Those more likely than average to say they would recommend TCS to a colleague or business associate include:

- Partner Institutions (91%), and large organizations (88%); and,
- Canadian Subsidiaries Abroad (89%), as well as those based on Alberta (87%) or the Atlantic (88%).

Organizations with sales of one billion or more (77%) are less likely to say they would recommend TCS to a colleague or business associate.

Table 2: Variation in Willingness to Recommend

--	n=	Definitely/Probably Not (1-2)	Definitely/Probably (4-5)
Total 2019	2965	4%	82%
Total 2013	1222	5%	86%
Total 2009	1449	8%	76%

*Table 2a: How would you rate your overall satisfaction with the service and advice provided by the TCS – **Service Type***

--	n=	Definitely/Probably Not (1-2)	Definitely/Probably (4-5)
Problem solving	150	6%	86%
Qualified contacts	1121	4%	83%
Market potential	627	4%	83%
Preparing for international markets	392	5%	80%
Additional service	199	5%	85%
Referral	474	3%	81%

*Table 2b: How would you rate your overall satisfaction with the service and advice provided by the TCS – **Business Line***

--	n=	Definitely/Probably Not (1-2)	Definitely/Probably (4-5)
International Business Development	2714	4%	82%
Science, Tech & Information	206	3%	86%
Foreign Direct Investment	43	2%	91%

Table 2c: Region

--	n=	Definitely/Probably Not (1-2)	Definitely/Probably (4-5)
BC	514	3%	83%
Alberta	334	2%	87%
Manitoba/Saskatchewan	134	4%	76%
Ontario	1014	6%	79%
Quebec	531	3%	82%
Atlantic	256	4%	88%
Outside of Canada	180	4%	89%

Table 2d: Number of employees

--	n=	**Definitely/Probably Not (1-2)**	**Definitely/Probably (4-5)**
SME	2222	5%	80%
Large	435	1%	88%
Partner	232	3%	91%

Table 2e: Largest Region (Based on $ Value)

--	n=	**Definitely/Probably Not (1-2)**	**Definitely/Probably (4-5)**
North America	1404	4%	81%
Latin American & Caribbean	578	3%	85%
Western & Eastern Europe	957	5%	80%
African & Middle East	749	4%	82%
South & East Asia	1049	3%	84%
Oceania	259	3%	78%

Partner (92%) and large organizations (89%) are more likely than average to say they would use the services of TCS again in the future. This is also true of organizations based in Alberta (89%). Results are otherwise very similar across sub-groups as shown in the following tables.

Table 3: Variation in Likelihood of Using Services Again

--	n=	**Definitely/Probably Not (1-2)**	**Definitely/Probably (4-5)**
Total 2019	2965	2%	85%
Total 2013	1222	3%	86%
Total 2009	1449	5%	81%

Table 3a: How would you rate your overall satisfaction with the service and advice provided by the TCS – ***Service Type***

--	n=	**Definitely/Probably Not (1-2)**	**Definitely/Probably (4-5)**
Problem solving	150	3%	87%
Qualified contacts	1121	3%	85%
Market potential	627	2%	86%
Preparing for international markets	392	2%	83%
Additional service	199	3%	86%
Referral	474	2%	82%

*Table 3b: How would you rate your overall satisfaction with the service and advice provided by the TCS – **Business Line***

--	n=	Definitely/Probably Not (1-2)	Definitely/Probably (4-5)
International Business Development	2714	2%	84%
Science, Tech & Information	206	2%	86%
Foreign Direct Investment	43	2%	88%

Table 3c: Region

--	n=	Definitely/Probably Not (1-2)	Definitely/Probably (4-5)
BC	514	2%	86%
Alberta	334	3%	89%
Manitoba/Saskatchewan	134	1%	80%
Ontario	1014	2%	83%
Quebec	531	3%	83%
Atlantic	256	2%	87%
Outside of Canada	180	3%	88%

Table 3d: Number of employees

--	n=	Definitely/Probably Not (1-2)	Definitely/Probably (4-5)
SME	2222	3%	83%
Large	435	0%	89%
Partner	232	2%	92%

Table 3e: Largest Region (Based on $ Value)

--	n=	Definitely/Probably Not (1-2)	Definitely/Probably (4-5)
North America	1404	2%	83%
Latin American & Caribbean	578	2%	88%
Western & Eastern Europe	957	4%	83%
African & Middle East	749	2%	84%
South & East Asia	1049	2%	87%
Oceania	259	1%	78%

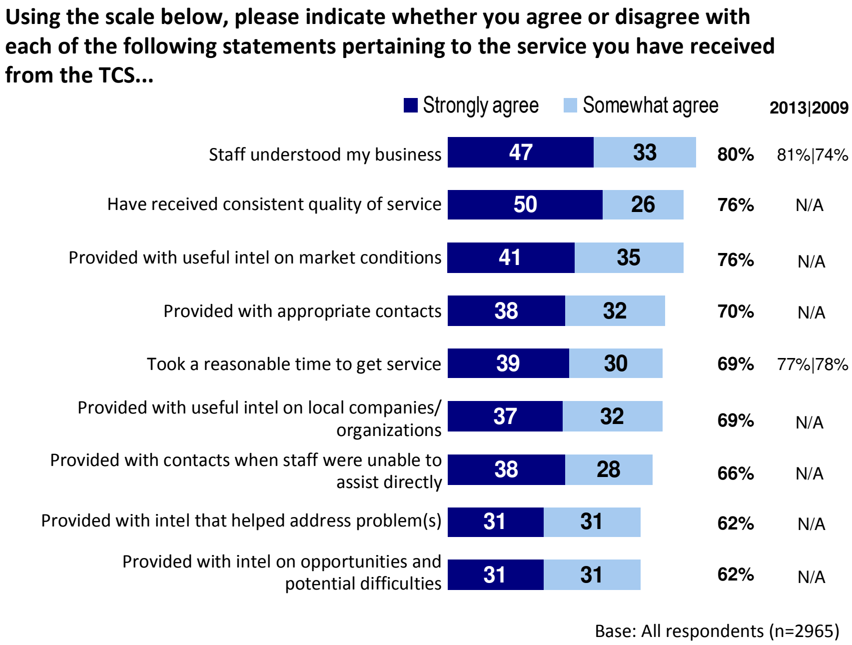
2.2 FACTORS CONTRIBUTING TO CLIENT SATISFACTION

Clients were asked whether they agree or disagree with several statements about various aspects of the service provided by TCS. Among these, respondents most often agree that TCS staff demonstrated an understanding of clients' business (80%), that TCS provided a consistent quality of service (76%) and that they obtained useful intelligence on market conditions from TCS (76%). In each case between 9% and 11% provided a neutral response (not shown in chart). Only a small proportion disagreed in terms of staff understanding the business and providing useful intelligence (5%-6%), although 11% disagreed about receiving consistent quality of service. Staff understanding of clients' business is also on par with 2013 results.

Seven in ten respondents say TCS provided contacts to the right people with whom to do business (70%) and it took a reasonable amount of time to get what they needed from TCS (69%). The same proportion say TCS staff provided them with useful intelligence on local companies and organizations (69%). One in ten disagreed that the service took a reasonable amount of time, although only 6% to 7% said the same about staff providing contacts and useful intelligence about local organizations. The turnaround time is also less positive than in 2013 when 77% agreed the time to get service was reasonable.

Two in three clients say TCS provided them with appropriate contacts when unable to provide assistance (66%), while just over three in five say they were provided with intelligence that helped solve problems (62%) or intelligence on opportunities and potential difficulties they could encounter (62%). In each case few disagreed (6% to 7%) although 13% to 18% were neutral in their response.

Chart 2: Aspects of the Client Experience with TCS



The following tables outline the significant differences found among the major demographic subgroups. Large businesses (500 employees or more), partner organizations and women-owned businesses are more likely than others to say their experience positively reflected each attribute. Although organizations that employ 500 people or more are often more positive, those with sales of $1 billion or more annually are often less positive.

Table 4: Demographic Differences among the Tested Aspects of TCS Service

Table 4a: Staff understood my business (80%)

More likely than average	Less likely than average
Target Market - East/S.E. Asia (74%)	--

Base: All respondents (n=2965) / % Strongly/Somewhat Agree

Table 4b: Provided with useful intelligence on market conditions (76%)

More likely than average	Less likely than average
Large Organizations (82%)	Canadian Subsidiary Abroad (70%)
Woman-owned Businesses (82%)	Sales: $1b+ (64%)
--	TCS Service – Prepare for international markets (71%)

Base: All respondents (n=2965) / % Strongly/Somewhat Agree

Table 4c: Have received consistent quality of service (76%)

More likely than average	Less likely than average
Business line - Science, Tech. & Innovation (87%)	Sales: $1b+ (70%)
Target Market - South Asia (86%)	Partner Institutions (70%)
Woman-owned Businesses (85%)	Based in Saskatchewan/Manitoba (68%)
Canadian Subsidiary Abroad (82%)	Target Market - East/ S.E. Asia (68%)

Base: All respondents (n=2965) / % Strongly/Somewhat Agree

Table 4d: Provided with appropriate contacts (70%)

More likely than average	Less likely than average
Partner Institutions (77%)	Sales: $1b+ (62%)
Business line - Science, Tech. & Innovation (77%)	--
Large Organizations (76%)	--
Target Market - Middle East/N. Africa (76%)	--
Foreign Subsidiary in Canada (76%)	--

Base: All respondents (n=2965) / % Strongly/Somewhat Agree

Table 4e: Took a reasonable amount of time to get service (69%)

More likely than average	Less likely than average
Woman-owned Businesses (78%)	Based in Saskatchewan/Manitoba. (60%)
Partner Institutions (77%)	Sales: $1b+ (57%)
Based in Atlantic Canada (75%)	--

Base: All respondents (n=2965) / % Strongly/Somewhat Agree

Table 4f: Provided useful intelligence on local companies/organizations (69%)

More likely than average	Less likely than average
Partner Institutions (77%)	Target Market - Eastern Europe (64%)
--	TCS service - Prepare for international markets (63%)

Base: All respondents (n=2965) / % Strongly/Somewhat Agree

Table 4g: Provided with intelligence that identified opportunities and potential difficulties (62%)

More likely than average	Less likely than average
Partner Institutions (70%)	Sales: $5-$25m (57%)

Base: All respondents (n=2965) / % Strongly/Somewhat Agree

Table 4h: Provided with intelligence that helped address problems (62%)

More likely than average	Less likely than average
TCS service - Problem Solving (73%)	TCS service - Prepare for international markets (56%)
Woman-owned Businesses (73%)	--
TCS service - Additional service (71%)	--

Base: All respondents (n=2965) / % Strongly/Somewhat Agree

Table 4i: Provided with contacts when staff could not assist directly (66%)

More likely than average	Less likely than average
Woman-owned Businesses (73%)	Foreign Subsidiary in Canada (60%)
Target Market - South Asia (73%)	Sales: $1b+ (58%)

Base: All respondents (n=2965) / % Strongly/Somewhat Agree

2.3 MOTIVATION FOR CONTACTING TCS

Clients were asked to describe how much assistance they need in several areas. About four in five clients indicated their need for a great deal or at least some assistance with market intelligence (83%), referrals to international business opportunities or sales leads (79%) and information on local companies or organizations of note (79%).

A second tier of priorities identified by at least three in five clients as areas where they need a great deal or at least some assistance include: recommendations on trade fairs or trade missions (72%); help with understanding responsible business practices abroad (66%); and, referrals to relevant programs and services available to their business (62%).

In a third tier, half to just under half of clients say they need a great deal or some assistance with advice on planning a trip (51%), referrals to professional service providers (50%), support on intellectual property (IP) rights and dealings with local governments (48%), information on locating financial assistance (47%), or referrals to technology or R&D-related partnerships (45%). .

Chart 3: Priority Areas of Need among TCS Clients

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

Base: All respondents (n=2965)

In nearly all of the areas tested, significantly greater proportions of clients this year say they need assistance than in 2013 or 2009. There are two exceptions where similar proportions of clients express a need for assistance compared with 2013: obtaining information on local companies or organizations (79% vs. 74% in 2013) and support on IP rights and government affairs (48% vs. 46% in 2013). In every other area tested, clients are at least 10 percentage points more likely to say they need assistance this year than in the previous research.

The tables below highlight the demographic subgroups significantly more or less likely to say they need a great deal or at least some assistance.

Table 5: Demographic Differences Based on Priority Areas of Need

Table 5a: Market intelligence and information (83%)

More likely to need assistance	Less likely to need assistance
Consultant/Sole Proprietor (89%)	TCS service - Problem Solving (73%)
Woman-owned Businesses (88%)	Canadian Subsidiary Abroad (71%)

Base: All respondents (n=2965) / % who need a “Great deal” or “Some” assistance in each area

Table 5b: Referrals to international business opportunities/sales leads (79%)

More likely to need assistance	Less likely to need assistance
Woman-owned Businesses (90%)	Based in Saskatchewan/Manitoba (71%)
Sales - <$1m (87%)	Sales - $1b+ (70%)
Consultant/Sole Proprietor (86%)	Target Market - Middle East/N. Africa (68%)
Micro-business (less than 10 employees) (85%)	Large Organizations (500 employees+) (65%)
--	TCS service - Problem Solving (62%)

Base: All respondents (n=2965) / % who need a “Great deal” or “Some” assistance in each area

Table 5c: Information about organizations or companies in foreign markets (79%)

More likely to need assistance	Less likely to need assistance
Based in Alberta (85%)	Large Organizations (500 employees+) (74%)
Consultant/Sole Proprietor (86%)	Target Market - East/ S.E. Asia (73%)
Sales - <$1m (85%)	--
--	TCS service - Problem Solving (70%)
--	Canadian Subsidiary Abroad (63%)

Base: All respondents (n=2965) / % who need a “Great deal” or “Some” assistance in each area

Table 5d: Recommendations on trade fairs/trade missions to attend (72%)

More likely to need assistance	Less likely to need assistance
Consultant/Sole Proprietor (81%)	Large Organizations (500 employees+) (67%)
Based in Atlantic Canada (78%) or Alberta (77%)	Sales - $1b+ (66%)
Sales - <$1m (78%)	Target Market - East/ S.E. Asia (66%)
--	TCS business line - Science, Tech. & Innovation (65%)
--	Canadian Subsidiary Abroad (61%)
--	Foreign Subsidiary in Canada (59%)
--	TCS service - Problem Solving (53%)

Base: All respondents (n=2965) / % who need a "Great deal" or "Some" assistance in each area

Table 5e: Understanding responsible business practices in foreign markets (66%)

More likely to need assistance	Less likely to need assistance
Based in Alberta (74%)	Target Market - Middle East/N. Africa (59%)
Sales - <$1m (72%)	Large Organizations (500 employees+) (60%)
Target Market - Eastern Europe (72%)	Target Market - East/ S.E. Asia (59%)
--	Sales - $1b+ (58%)
--	TCS service - Problem Solving (57%)
--	Foreign Subsidiary in Canada (57%)
--	Canadian Subsidiary Abroad (55%)

Base: All respondents (n=2965) / % who need a "Great deal" or "Some" assistance in each area

Table 5f: Referrals to other relevant commercial programs and services (62%)

More likely to need assistance	Less likely to need assistance
Micro-business (less than 10 employees) (70%)	Sales - $25m-$1b (54%)
TCS business line - Science, Tech. & Innovation (69%)	Target Market - East/ S.E. Asia (54%)
TCS service - Prep for international markets (68%)	--
Based in Quebec (68%)	TCS service - Problem Solving (51%)
--	--
--	Foreign Subsidiary in Canada (49%)
--	Large Organizations (500 employees+) (48%)

Base: All respondents (n=2965) / % who need a "Great deal" or "Some" assistance in each area

Table 5g: Practical advice on timing and organizing your business trip (51%)

More likely to need assistance	Less likely to need assistance
Partner Institutions (67%)	Sales - $25m-$1b (44%)
Consultant/Sole Proprietor (60%)	Foreign Subsidiary in Canada (40%)
Based in Alberta (59%)	TCS service - Problem Solving (34%)
Based in Saskatchewan/Manitoba (59%)	Sales - $1b+ (34%)
TCS service - Prep for international markets (57%)	Canadian Subsidiary Abroad (31%)
Sales - <$1m (57%)	--

Base: All respondents (n=2965) / % who need a “Great deal” or “Some” assistance in each area

Table 5h: Referrals to legal professionals, human resource professionals, translators and other professional service providers (50%)

More likely to need assistance	Less likely to need assistance
Sales - $1b+ (58%)	--
Sales - <$1m (57%)	Foreign Subsidiary in Canada (44%)
Based in Alberta (57%)	Target Market - Middle East/N. Africa (44%)
Micro-business (less than 10 employees) (56%)	--
Based in Saskatchewan/Manitoba (56%)	Large Organizations (500 employees+) (41%)
--	Canadian Subsidiary Abroad (38%)

Base: All respondents (n=2965) / % who need a “Great deal” or “Some” assistance in each area

Table 5i: Support for the protection of intellectual property rights, government procurement and/or regulatory matters (48%)

More likely to need assistance	Less likely to need assistance
Sales - <$1m (56%)	Large Organizations (500 employees+) (39%)
TCS business line - Science, Tech. & Innovation (56%)	Sales - $1b+ (39%)
--	Large Organizations (500 employees+) (38%)

Base: All respondents (n=2965) / % who need a “Great deal” or “Some” assistance in each area

Table 5j: Information or advice on locating financial/funding assistance (47%)

More likely to need assistance	Less likely to need assistance
TCS business line - Science, Tech. & Innovation (62%)	Target Market - Eastern Europe (40%)
Sales - <$1m (63%)	Target Market - Middle East/N. Africa (39%)
Micro-business (less than 10 employees) (59%)	Based in Saskatchewan/Manitoba (38%)
Based in Atlantic Canada (57%)	TCS business line - Problem Solving (37%)
TCS service - Prep for international markets (54%)	--
Target Market - W. Europe (54%)	--
Executive (54%)	Large Organizations (500 employees+) (36%)
--	Sales - $25m-$1b (34%)
--	Foreign Subsidiary in Canada (32%)

Base: All respondents (n=2965) / % who need a “Great deal” or “Some” assistance in each area

Table 5k: Referral of technology and/or RD partnership opportunities (45%)

More likely to need assistance	Less likely to need assistance
TCS business line - Science, Tech. & Innovation (77%)	Key Responsive Sectors / All Other Sectors (39%)
Partner Institutions (54%)	Target Market - Middle East/N. Africa (34%)
Key Proactive Sectors (53%)	Sales - $25m-$1b (33%)
Sales - <$1m (52%)	Foreign Subsidiary in Canada (32%)
TCS service - Prep for international markets (51%)	TCS service - Problem Solving (29%)
Target Market - W. Europe (51%)	--

Base: All respondents (n=2965) / % who need a “Great deal” or “Some” assistance in each area

When asked what compelled them to contact TCS in the past, respondents most often say they contacted TCS to get basic information about doing business in a market (61%). More specifically, about half of respondents say they have approached TCS in the past for assistance with sales and marketing (48%). About three in ten clients say they have approached TCS for information about distribution channels (34%), how to export goods to a market (32%) or for information on services available to companies exporting goods or services (30%). One in four respondents say they have contacted TCS in the past for help with specific, time-sensitive problems they have encountered. Fewer than one in five respondents contacted TCS to promote educational opportunities in Canada (17%), for information on establishing bricks and mortar operations in a market (11%), or for information on licensing or franchising technology (8%)

Chart 4: Reasons for Contacting TCS in the Past

Please indicate which – if any – of the following are reasons your organization has approached the TCS in the past?

Base: All respondents (n=2965)

Clients most often report that TCS provided assistance in markets where they export goods (34%) or services (31%), or in markets where they maintain a revenue-generating partnership or joint venture (22%). Beyond these three major activities, fewer than one in ten clients say they engaged in several other activities in markets where TCS helped them. One in five respondents say they are not pursuing any activities (at least none of those tested) in markets where they received assistance (21%), or do not know whether they are (5%).

Chart 5: Activities in Markets where TCS Provided Assistance

Which of the following has your organization done in foreign markets where you received assistance from TCS?

Base: All respondents (n=2965)

2.4 CLIENT OUTCOMES

The following table summarizes responses to three follow-up questions asking clients to rate the contribution, impact and financial outcomes of activities pursued in markets where they obtained service or advice from TCS.

The results indicate that between one in four and four in ten clients say TCS made a substantial contribution to all of the tested activities happening in markets where they requested assistance. In particular, clients say that TCS made important or essential contributions by helping to remove market barriers (44%), helping clients establish revenue-generating partnerships (41%) and with sales through foreign affiliates (39%) as well as the export of goods and services (32% each).

In each of the same areas, at least two in three clients say that TCS had a meaningful impact on the outcome (describing that an activity would have taken longer, cost more money to realize or never would have happened at all). In particular, four in five clients (82%) said that TCS had an impact on removing a market barrier. Seven in ten, meanwhile, said that TCS had a meaningful impact on revenue generating partnerships in foreign markets (69%) and on foreign affiliate sales (70%).

Clients were asked to estimate the range of annual revenue their organization had realized by pursuing activities in markets where they received assistance from TCS. Just over one in four clients who were assisted with new direct investments in their organization say that the assistance TCS provided was worth $500,000 or more in annual revenue (27%). Just over one in five clients who were helped by the removal of a market barrier (22%) or who secured revenue-generating investments from abroad (21%) say that TCS' assistance was worth at least $500,000 annually.

Table 6: Contribution, Impact and Financial Outcomes of TCS Services

Activities in Markets where TCS Provided Assistance	Contribution	Impact	$ Outcome
Sales resumption/increase after removal of market barrier (n=126)	44%	82%	22%
Revenue-generating partnership, joint venture (n=643)	41%	69%	10%
Foreign affiliate sales (n=144)	39%	70%	17%
Export of goods (n=1018)	32%	64%	19%
Export of services (n=920)	32%	65%	13%
Expansion of existing investment in my organization (n=156)	31%	63%	19%
Attracting angel investors or venture capital (n=125) New direct investment in my organization (n=126)	30%	62%	18%

Activities in Markets where TCS Provided Assistance	Contribution	Impact	$ Outcome
New direct investment in my organization (n=126)	29%	58%	27%
Licensing of technology (n=160)	28%	53%	11%
Investment abroad leading to revenue (n=174)	27%	57%	21%

Base sizes report the number of respondents saying TCS provided assistance in each area.

Contribution reports the percentage rating TCS' contribution to each activity as important or essential (4 or 5 on the scale provided).

Impact reports the percentage of respondents saying an activity would have taken longer, cost more money or not have been possible without assistance from TCS.

$ Outcome reports the percentage of respondents who say an activity TCS assisted with contributed to $500,000 or more in revenue over the past two years.

When asked whether TCS helped them by providing several different types of service, three in five say that TCS helped by providing intelligence and information they could not have received elsewhere (62%). Similar proportions say that TCS helped provide contacts they would not have otherwise found (58%), explore or expand in a foreign market (58%), improve their organizations' profile and credibility (58%) and improve their knowledge about the competitive environment in a market (56%).

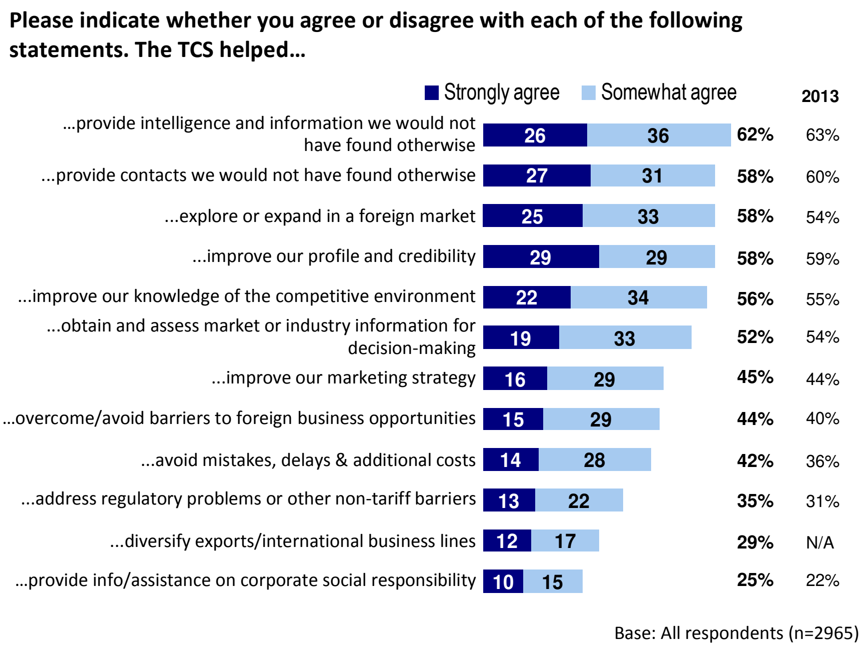
It is important to note that while fewer clients may say that TCS helped them in a given area, this does not necessarily mean the assistance TCS provides in the area is not valuable. Indeed, clients were less likely to say that TCS helped to overcome a market barrier (44%). However, in the previous section of the report, results illustrated that clients who received assistance with the removal of a market barriers were most likely to say that TCS made a major contribution and had a meaningful impact on their efforts, and that the removal of a barrier led to $500,000 or more in annual revenue.

Fewer respondents say that TCS helped by providing market or industry information needed for decision-making purposes (52%) or that TCS helped improve their marketing strategy (45%). Also, of a more operational nature, clients less often say that TCS helped clients avoid mistakes, delays or additional costs (42%).

In areas related to public affairs and interactions with foreign governments, clients less often say that TCS helped them address regulatory challenges (35%) or helped on matters related to corporate social responsibility (25%). In addition, clients are also less likely to say that TCS helped them diversify their exports or business lines (29%).

In each of these areas results are similar to those measures in 2013 with the exception of perhaps avoiding mistakes, delays and additional costs where results are slightly more positive (42% compared with 36% in 2013).

Chart 6: Service Outcomes of Interactions with TCS

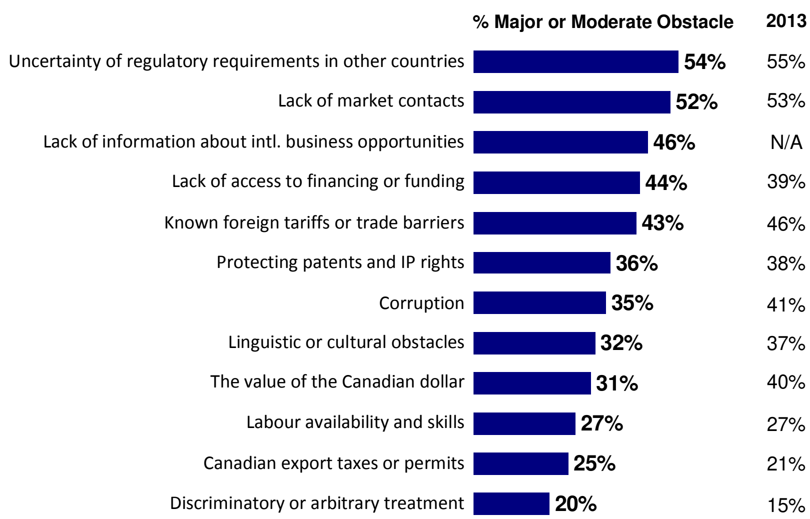


2.5 OBSTACLES TO INTERNATIONAL TRADE

A number of obstacles to activities in international markets were indicated with uncertainty about foreign regulatory requirements (54%) and lack of market contacts (52%) at the top of the list, cited by about half of clients, as was also the case in 2013. Lack of information (46%), lack of access to financing (44%) and foreign tariffs or trade barriers (43%) were also commonly identified as obstacles. Lack of funding is an issue for a slightly higher proportions of clients than identified in 2013 when it was 39%. About one in three, pointed to patents and intellectual property rights (36%), corruption (35%), language or cultural differences (32%), and the value of the Canadian dollar (31%) as obstacles, where fewer identifying other areas as a concern. The value of the Canadian dollar is also significantly less of an issue compared with 2013 when it was noted by 40%.

Chart 7: Obstacles to Conducting International Trade

How large of an obstacle are each of the following issues to your organization's activities in international markets?



Base: All respondents (n=2965)

2.6 MARKET DIVERSIFICATION

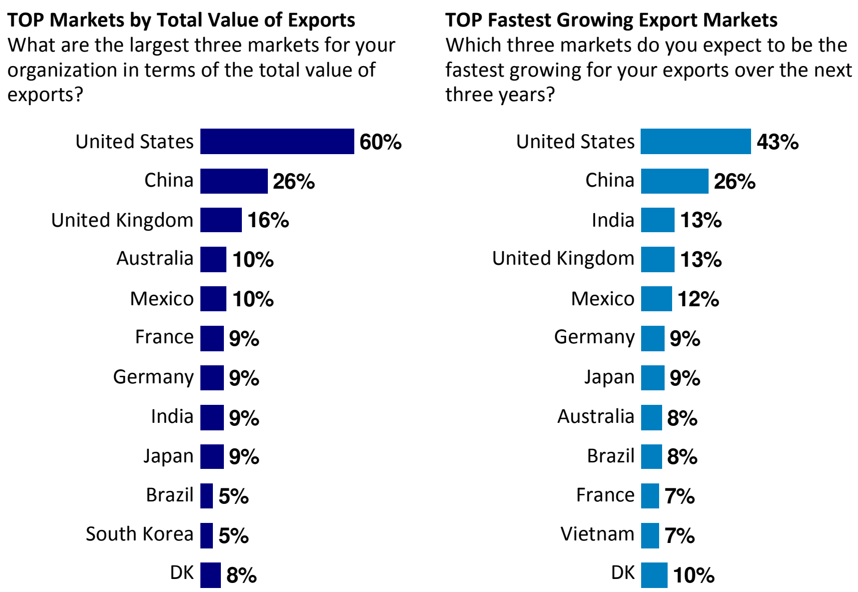
Three in five clients (60%) say they export goods and services to the United States and to other foreign markets. An additional one in five (19%) say they export goods and services to foreign markets but not to the United States. The remainder says they either export solely to the United States (6%) or did not know how to answer the question (15%).

Chart 8: Export Activities to the U.S. and Other Markets

Asked to name their organizations' three largest export markets, respondents most often identified the United States (60%), followed at a distance by China (26%). In third place, 16% of clients identified the United Kingdom as a top market for their organization.

Asked to name the three markets for their organizations' exports which they expect to grow the fastest over the next three years, the United States (43%) is, again, the top market identified followed by China (26%). India (13%) and the United Kingdom (13%) are tied in third place, followed closely by Mexico (12%).

Chart 9: Top National Markets by Total Value of Exports and Growth



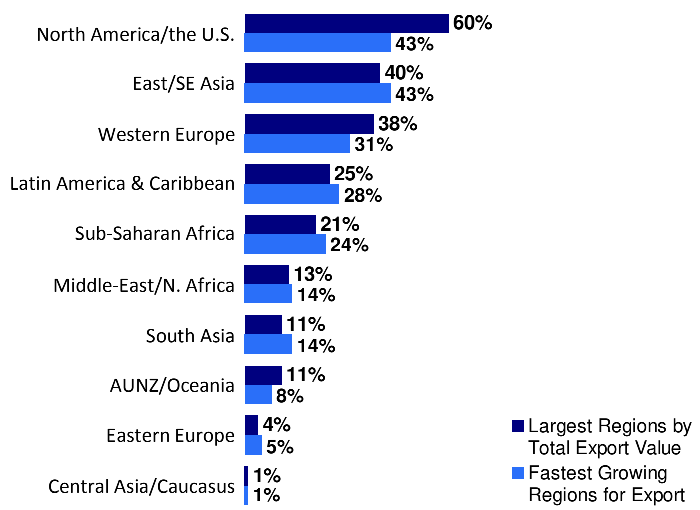
Base: Respondents who do international business outside of the U.S. (n=2332)

The following chart provides a regional summary of results for the largest current markets and the ones expected to grow the fastest in the next three years. Since Mexico has been summarized as part of Latin America, the North America result consists only of the United States.[2] As such, North America (the United States) is the largest region for current exports. North America is tied with East/Southeast Asia (including China) as the region where exports are expected to grow the fastest over the next three years. North America and Western Europe, with the oldest and best established trading relationships with Canada, are the only regional markets where the proportion that expect these to be the fastest growing markets is lower than the proportion that identify them as top current markets.

Chart 10: Regions by Total Value and by Fastest Growing Export Markets

Largest Regions by Value of Exports What are the largest three markets for your organization in terms of the total value of exports?

Fastest Growing Regions for Exports Which three markets do you expect to be the fastest growing for your exports over the next three years?



Base: Respondents who do international business outside of the U.S. (n=2332)

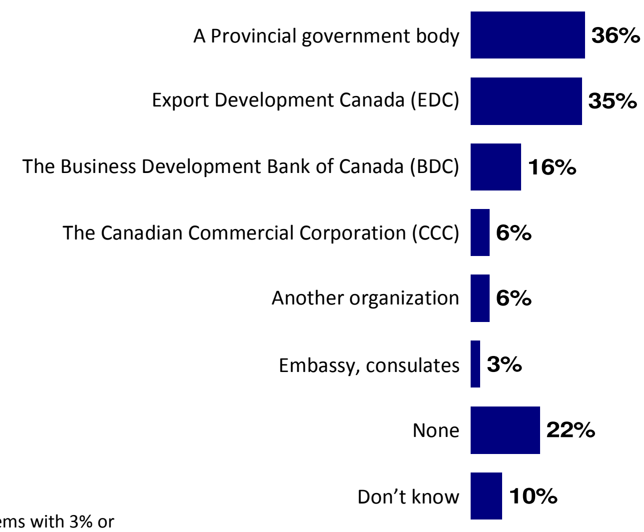
[2] North America also includes Greenland, Bermuda and U.S. island possessions, but these geographies have no impact on the results.

2.7 INTERACTIONS WITH OTHER ORGANIZATIONS FOCUSED ON INTERNATIONAL TRADE

When asked which of several other trade promotion organizations provided their organizations with support in the past two years, respondents most often say they received support from provincial government bodies (36%) or from the EDC (35%). The Business Development Bank of Canada (BDC) comes in a distant third place (16%), followed by the Canadian Commercial Corporation (CCC) at six percent. Overall, more than two in three clients (68%) say they have received support from trade promotion organizations other than TCS in the past two years.

Chart 11: Support from Other Trade Promotion Organizations

From which of the following Trade promotion organizations did your company receive support in the past 2 years (2017 and 2018)?



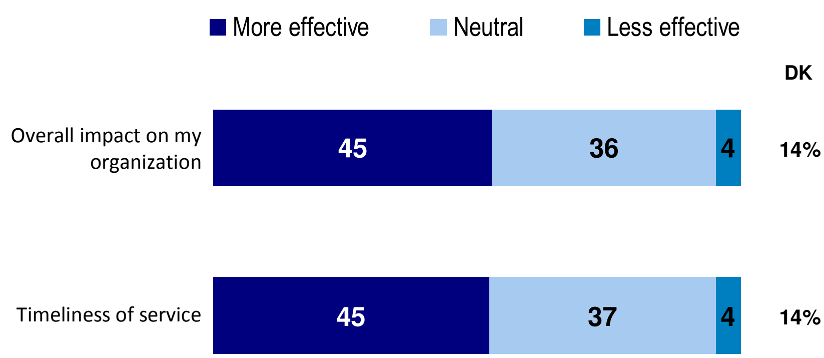
Only items with 3% or more shown in chart

Base: All respondents (n=2965)

Respondents were asked to rate the effectiveness of TCS services in comparison with other organizations they have received support from. Clients are more likely to say that TCS was more effective in terms of the overall services provided (45%), as well as in terms of the timeliness of the service provided (45%), than to say the impact of service on their organizations was "neutral" or roughly the same as services from other organizations. Few respondents (4% in each case) say that TCS provided services that were less effective than another organization.

Chart 12: Effectiveness of TCS Services Compared to Other Trade Organizations

Would you say the service you received from TCS was more or less effective than service you received from another Canadian trade promotion organization in the past two years?



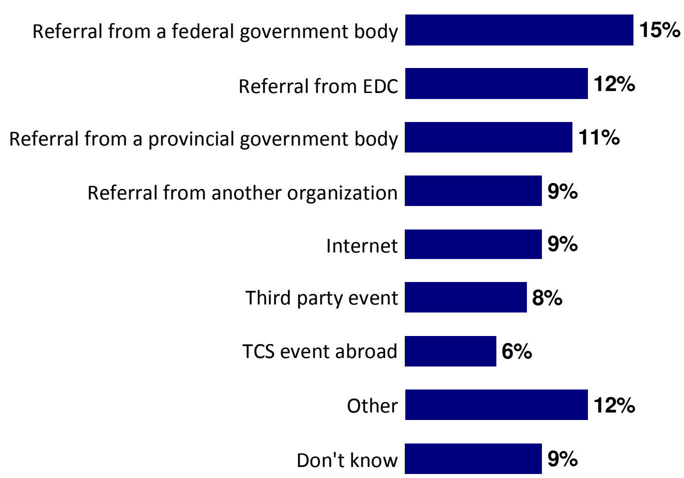
Base: Respondents who received services from another trade promotion organization (n=2965)

2.8 Historical Experience and Interactions with TCS

When asked how they initially learned about TCS, respondents most often say they were referred to TCS by another federal government body (15%). Referrals from EDC (12%) or from a provincial government body (11%) follow closely.

Chart 13: Initial Source of Awareness of the TCS

How did you initially learn about the Trade Commissioner Service (or TCS)?



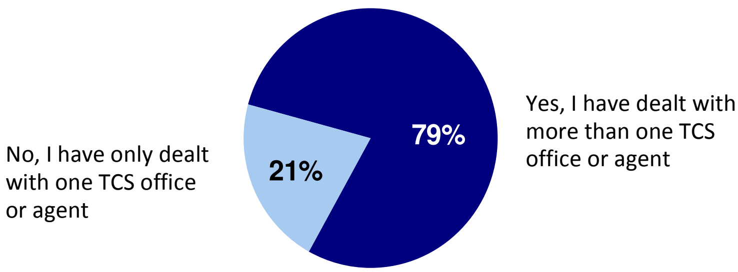
Only items with 3% or more shown.

Base: All respondents (n=2965)

The majority of clients (79%) say they have dealt with more than one TCS office or agent in the past.

Chart 14: Points of Contact with the TCS

Have you personally had experience contacting more than one office or representative from the TCS?

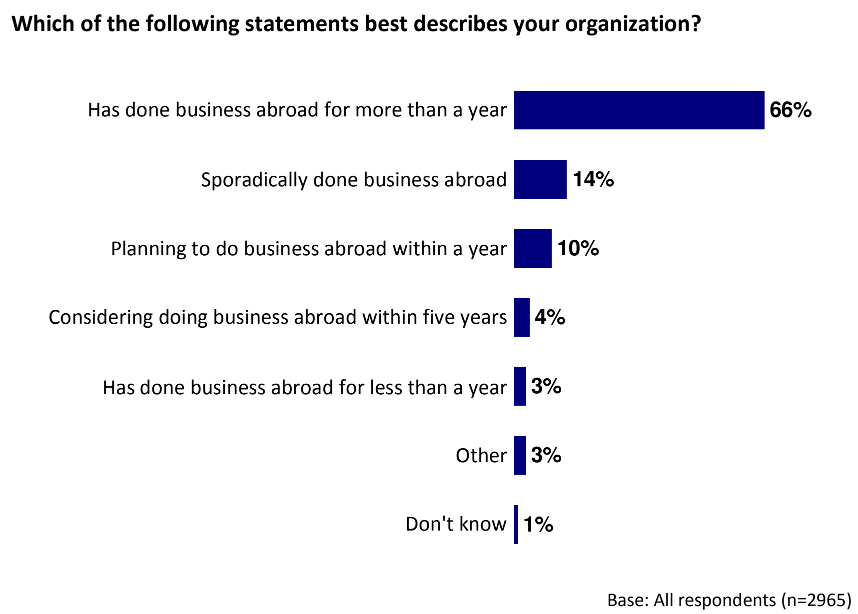


Base: All respondents (n=2965)

2.9 EXPERIENCE WITH AND ACTIVITIES IN INTERNATIONAL TRADE

Two in three clients say they their organization has done business abroad for over a year (66%). An additional 14% say they have only sporadically done business abroad. Fewer than one in five respondents overall (17%) describe their organization as relatively inexperienced with international trade, saying either that they plan to do business abroad within a year (10%), that they are considering doing so within five years (4%) or that they have been doing business abroad for less than one year (3%).

Chart 15: Nature and Length of Experience with International Trade



When asked what activities they are currently engaged in abroad, clients most often say they are exporting goods (52%) or services (45%) to foreign markets. Others say they are engaged in partnerships with foreign organizations (37%) or are seeking R&D or other technology partnerships (33%). About one in four (23%) say they are seeking project financing or venture capital, while fewer than one in five say they are licensing a product, brand or technology from a foreign organization (19%) or that they are soliciting foreign investments (15%).

Chart 16: Current Engagement in International Trade

2.10 SEGMENTATION OF TCS CLIENTS

a) Factor Analysis

A factor analysis was conducted to identify areas with response patterns that closely correlate with each other and which account for a significant amount of variance within the dataset overall. The outcome of the analysis is a summary perspective consolidating the various issues addressed in the survey into a few major themes, or factors, influencing responses. In the analysis, four factors were identified, accounting for 55% of the variance in responses. This suggests that there are other factors at work in the relationship TCS has with clients that are not encompassed by these four factors, however these four factors go a considerable distance to explaining responses encompassed in the survey.

While these factors do not comprehensively explain or account for all the important aspects of TCS' client relationships, they likely represent the most important influences. The top factors are:

- Helping clients avoid costly/time-wasting mistakes or surmount barriers to success (explaining 33% of variance within the data);
- Providing market information, contacts and problem solving (explaining 11% of variance);
- Providing very basic or practical information or advice (explaining 6% of variance);
- Helping to address areas where TCS addresses taxes, tariffs or regulations posing barriers to trade (explaining 5% of variance).

The level of importance of each of these factors will likely vary at different points in the service relationship. In order to address the extended question about how these factors and other issues work within the client population, these factors have been combined to better understand and describe distinguishable segments of clients.

Total Variance Explained by the Four Key Factors:

- **FACTOR #1: Avoiding Mistakes, Surmounting Barriers** (*Total Variance Explained: 29.9%)*
    - Approached TCS to obtain information and assistance on corporate social responsibility
    - TCS helped us avoid mistakes, delays or incurring additional costs in pursuing an opportunity
    - TCS improved our ability to address regulatory problems or other non-tariff barriers encountered in foreign market
    - Approached TCS to overcome or avoid barriers to new foreign business opportunities

- TCS helped improve our marketing strategy in foreign market(s)

- <u>FACTOR #2</u>: **Getting Directions, Solving Problems** (*Total Variance Explained: 12.4%)*
  - The information I received was helpful to understand overall market conditions
  - It took a reasonable amount of time to obtain what I needed
  - Staff referred me to the right contacts if they could not help me directly
  - The contacts I received were the right people with which to do business
  - The market intelligence/information about local companies and organizations was useful

- <u>FACTOR #3</u>: **Getting Basic Advice** (*Total Variance Explained: 6.8%)*
  - Info on organizations or companies
  - Understanding responsible business practices abroad
  - Market intelligence and information
  - Advice on timing and organizing a trip
  - Recommendations on trade fairs/ trade missions

- <u>FACTOR #4</u>: **Cultural obstacles, Corruption and Protection** (*Total Variance Explained: 4.7%)*
  - Needs assistance addressing linguistic or cultural obstacles
  - Needs assistance on labour availability and skills
  - Needs assistance to address corruption
  - Concerned about patents and/or intellectual property rights
  - Looking for recommendations on trade fairs/ trade missions

b) Segmentation Analysis

A segmentation analysis was created using the four factors identified in combination with key demographic variables, including the type of organization, nature of services sought, number of employees, sales and key markets (by total exports).

This analysis identifies four key segments of interest, summarized below. Appendix D provides more detailed results for each of the four segments.

<u>SEGMENT #1</u>: Small Businesses Grateful for the Help (*Percentage of sample: 31%)*
Overall Satisfaction, Likelihood to Recommend & Use Again
Segment #1 is the…

- ◇ Most satisfied of the four audiences (58% very satisfied vs. 45% on average);
- ◇ Most likely to recommend TCS to others (79% definitely vs. 66% on average); and,
- ◇ Most likely to say they would use TCS services in the future (81% definitely vs. 68% on average).

- **Key Markets**
  - ◇ There is little to distinguish respondents in Segment #1 in terms of the markets where they are currently active or in terms of audiences they expect to grow in the future.
- **Service Attributes**
  - ◇ Given that they are the most satisfied of the four audiences, it is of little surprise that Segment #1 is more positive with respect to the various aspects of service received from TCS. In particular, 64% strongly agreed that they have received consistent quality of service, while 60% say TCS staff understood their business.
  - ◇ Segment #1 is relatively less satisfied with respect to gaining intel that helped them address problems (43%) or that identified opportunities or difficulties (44%).
- **Needs**
  - ◇ While Segment #1 is the most satisfied with TCS, they are also more likely to say they are in great need of assistance in most of the areas tested in the survey, especially referrals to international opportunities or sales leads (56%), information on organizations or companies in specific markets (53%) and market intelligence and information (48%). They are somewhat less likely to say they need help accessing financing (15% vs. 20% on average).
- **Outcomes of Service**
  Again, it is of little surprise that Segment #1 is much more likely to agree that they have achieved several positive outcomes as a result of the service or information received from TCS. In particular, they are most likely to strongly agree that TCS helped them:
  - ◇ Improve their profile and credibility in foreign markets (44%);
  - ◇ Gain access to customers and partners that would have been difficult to obtain without the support of the TCS (42%);

- Gain access to intelligence and information that would have been difficult to obtain without the support of the TCS (41%);
- Gain confidence to explore or expand in a foreign market (40%).
- In terms of specific contributions made by TCS, Segment #1 respondents are more likely to say TCS made an "essential" contribution leading to a resumption or increase in sales after removing a market barrier (35%); foreign affiliate sales (30%); and, investment abroad resulting in revenue (31%).

- **Demographic Characteristics**
  Segment #1 is more likely than average to:
  - Have approached TCS for help obtaining qualified contacts (56% vs. 38% on average);
  - Represent small businesses (<10 employees: 53% vs. 28% on average);
  - Have less than $1 million in annual sales (55% vs. 31% on average).

<u>SEGMENT #2</u>: Big and Hard to Impress (*Percentage of sample: 25%)*
Overall Satisfaction, Likelihood to Recommend & Use Again
Segment #2 is above average in their satisfaction with TCS:

- Second most satisfied of the four segments (50% very satisfied vs. 45% on average);
- Second most likely to recommend TCS to others (72% definitely vs. 66% on average); and,
- Second most likely to say they would use TCS services in the future (73% vs. 68% on average).

- **Key Markets**
  - Segment #2 is more likely to sell to the U.S. and to other foreign markets (80% vs. 70% on average). They are somewhat more likely to include East (45% vs. 40% on average) and South Asia (16% vs. 11%) among their most important markets. They are, however, somewhat pessimistic about the prospects for growth in the U.S. and Western Europe (their third most important market).

- **Service Attributes**
  - Given the higher level of satisfaction expressed with TCS, it is not surprising to find that Segment #2 is more positive with respect to several service attributes of the services received from TCS. However, they are just average with respect to receiving a consistent quality of service from TCS (49% vs. 50% on average).

- **Needs**
    - Since Segment #2 consists primarily of representatives of larger businesses (see Demographic Characteristics below), it is perhaps not surprising to find they are less likely than average to say they need a great deal of assistance in most of the tested areas. For example, whereas 44% of respondents say they need a great deal of assistance with international business opportunities and sales leads, only 31% of Segment #2 respondents say they need a great deal of assistance in this area.
- **Outcomes of Service**
    - Segment #2 are close to average in saying that TCS helped them in several areas. For example, where 33% of respondents strongly agree that TCS helped raise their profile and credibility in foreign markets, a similar 34% of Segment #2 respondents also say this. Segment #2 respondents are below average in strongly agreeing that TCS helped them improve their marketing strategy in a foreign market (18%), gain confidence to diversify product lines (15%) and obtain information about corporate responsibility (14%).
    - Segment #2 are less likely to say that TCS made an "essential" contribution in several areas (hence the "hard to impress" label). In particular, 6% say TCS made an essential contribution towards foreign affiliate sales compared to 17% among all respondents, while 6% also say TCS made an essential contribution towards attracting angel investors, compared with 15% among all respondents.[3]
- **Demographic Characteristics**

  Segment #2 is more likely than average to:
    - Have approached TCS for help obtaining qualified contacts (49% vs. 38% on average);
    - Represent large businesses (500+ employees: 55% vs. 18% on average);
    - Have sales of $25 million or more ($25m-$1b: 70% vs. 19% on average);
    - They are also more likely to say they are middle management (37% vs. 21% on average) or employees of their organization (18% vs. 10%).

[3] Note that the data used in the analysis of this question removed the "Don't know/Not Applicable" respondents in order to provide an even comparison between those able to provide an answer.

<u>SEGMENT #3</u>: Searching for Investors (*Percentage of sample: 24%)*

Overall Satisfaction, Likelihood to Recommend & Use Again

Segment #3 is average in the satisfaction they express with TCS:

- Third most satisfied of the four segments (49% very satisfied vs. 45% on average);
- Third most likely to recommend TCS to others (68% definitely vs. 66% on average); and,
- Third most likely to say they would use TCS services in the future (71% vs. 68% on average).
- Key Markets
- Segment #3 hews closely to the average with respect to the markets it is active in and where it expects to see growth. For example, 57% of Segment #3 says that the U.S. is their top market, compared to 60% on average.

Service Attributes

- Segment #3 is slightly above average in their assessment of various attributes of the service provided by TCS. They are more likely than average to say that they have received a consistent quality of service from TCS (55% vs. 50% on average).

Needs

- Segment #3 hews close to the average in saying it needs a great deal of assistance in several areas. Segment #3 respondents are somewhat more likely to say they need a great deal of assistance in identifying relevant programs and services offered by the Government (29% vs. 25% on average).

Outcomes of Service

- Segment #3 are less likely than average to strongly agree that TCS helped them gain access to intel that would have been hard to obtain without TCS (27%), and to strongly agree that TCS helped them avoid mistakes (17%) or that TCS helped address regulatory problems in a given market (17%).
- However, Segment #3 respondents are much more likely than average to say that TCS made an essential contribution to attracting “angel investors” or venture capital (30% vs. 15% on average) and in helping expand of an existing investment in their organization (24% vs. 18% on average).

Commented [SG1]: Same % as second on previous page????

- **Demographic Characteristics**
  - Segment #3 is average in terms of the various demographic characteristics. In a reflection of their interest in seeking investors abroad, they are much more likely to have approached TCS to obtain referrals (65% vs. 16% on average) or to obtain “additional” services (26% vs. 7% on average).

SEGMENT #4: What Can the Government Do for Me? (*Percentage of sample: 24%)*
Overall Satisfaction, Likelihood to Recommend & Use Again
Segment #4 expresses the lowest level of satisfaction with TCS:

  - Least satisfied of the four segments (14% very satisfied vs. 45% on average);
  - Least likely to recommend TCS to others (33% definitely vs. 66% on average); and,
  - Least likely to say they would use TCS services in the future (36% vs. 68% on average).

- **Key Markets**
  - Segment #4 is most likely to identify the U.S. as their largest market (69% vs. 60% on average) and is the most likely to identify Western Europe as a major market (44% vs. 38% on average). They are also far more bullish than others on the prospects for growth in both markets in the years ahead.

- **Service Attributes**
  - Segment #4 is least satisfied with each of the attributes of service provided by TCS, in keeping with their lower overall satisfaction. In particular, whereas 50% of respondents strongly agree that TCS provided consistent quality service, only 20% of Segment #4 respondents say this. Likewise, just 15% of Segment #4 respondents say that TCS understood their business, compared to 47% among all respondents.

- **Needs**
  - Segment #4 respondents are less likely to say they need a great deal of assistance in some of the more basic areas, such as getting referrals to international business opportunities and sales leads (38% say they need a great deal of assistance in this area compared to 44% on average). They are, however, more likely to say they need assistance in addressing Canadian export taxes or permits (37%); dealing with discriminatory or arbitrary treatment against them as Canadian

businesses (39%); and, in dealing with the impact of a cheap Canadian dollar (37%).

- **Outcomes of Service**
  - Segment #4 are much less likely to say that TCS helped them improve their profile and credibility in foreign markets (9%); gain access to customers and partners that would have been difficult to obtain without the support of the TCS (8%) or gain access to intelligence and information that would have been difficult to obtain without the support of the TCS (7%).
- **Demographic Characteristics**
  Segment #4 are more likely to:
  - Have approached TCS for qualified contacts (43% vs. 38%);
  - Be executives (78% vs. 61% on average);
  - Represent mid-sized businesses (10-99 employees: 63% vs. 40% on average).

3. Detailed Qualitative Findings

The qualitative research involved 40 interviews with survey respondents. The interview participants were selected from amongst the n=1,138 respondents (41% of the sample) who agreed to participate in follow-up research.

The selection criteria were based on responses provided during the survey, particularly on the level of overall satisfaction expressed with TCS and on the willingness of participants to recommend TCS to colleagues. A review of the n=1,138 respondents who agreed to participate in follow-up research identified three basic groups emerging from these two fundamental questions:

- Positives: A substantial majority (82%, n=937) who have positive views towards TCS and say they are likely to recommend TCS to colleagues.
- Neutrals: An additional 11% (n=128) who express some combination of neutral views towards TCS ("neutral" in terms of their own satisfaction or "neutral" in that they might "possibly" refer a colleague to the TCS but would not "probably" or "definitely" do so).
- Negatives: A very small group (2%, n=27) who are dissatisfied and who say they would not recommend the TCS to a colleague.

The selection criteria focused on the "Neutrals" who expressed an ambivalent perspective towards TCS, neither wholly positive nor wholly negative. Thirty of the 40 interviews were conducted among these more neutral participants. The remaining 10 interviews were conducted amongst the more positive participants.

The segmentation of "Neutral" and "Positive" participants was designed to elicit different forms of feedback. In conversations with the "Neutral" participants, we sought to learn about their less-than-positive experiences with TCS in order to better contextualize suggested areas for improvement in the service or information TCS provides. The conversations with the "Positive" participants were designed to focus on the positive aspects of the service and information received in order to better understand which aspects of service deliver the greatest value to clients.

The following pages summarize the major themes and comments emerging from the discussions.

3.1 VIEWS ON THE SCOPE OF TCS SERVICES

TCS is commonly described as unique in the service and information it provides. While other organizations such as Export Development Canada and the Canadian Commercial Corporation are mentioned, these are understood as wholly different in their focus on financing and contract indemnification, rather than the front-end marketing and sales activities that compel most participants to contact TCS.

The unique nature of services provided by TCS can be a double-edged sword. On one hand, clients see TCS as unique in providing an important, even essential, service. On the other, clients largely agree that third-party service providers are not sufficiently specialized to provide the uniquely tailored advice and guidance required to be useful, leaving many participants pursuing solutions on their own.

This prompted discussions in the interviews about the role and scope of services TCS can be expected to provide. Although a minority perspective, a few participants were hard pressed to define an area where TCS could assist them, or way in which they could interact with TCS to greater advantage. The majority, however, have a clear understanding of the services and information TCS provides, gained from either the representatives they had dealt with or from years of experience working in international trade.

> *I got very clear information from the TCS representative about what kinds of information and services.*
>
> --
>
> *TCS is extremely opaque. They get back to you but there are layers of screening to go through and no clear organizational structure.*

Although several participants said that TCS is not always able to provide them with the highly specific support they feel they need, the majority believe that no government service provided by Canada or any other country can reasonably be expected to have the specific answers they need.

> *I would say we have gotten basic – minimally helpful – contacts to people in other countries. We have tempered our expectations, though. There's only so much we can expect TCS to help us with given the specific nature of our business and our industry.*

While most participants working in specialized markets – particularly those with more experience – expressed the view that TCS had reasonable limitations to the assistance it can offer, others expressed far higher expectations, with TCS providing more extensive assistance and advice, ranging from detailed market research to specific contacts with buyers in their industry, to the provision of office space to host meetings with prospective clients.

> *We did get some good information, but we didn't really get good service. We were interested in the ground level information and overall dynamics of NGOs and companies… and there was helpful information about events within mining industry. But we were looking to TCS to help us directly connect with individuals in the market and provide support in, maybe, hosting meetings and providing contact information. But they didn't have the budget and it was outside their mandate. They were great at sharing information, but not really able to move us forward.*
>
> *--*
>
> *The product I sell is huge with young people in my target markets … But the people at TCS don't know anything about it… They don't have any useful market research on distribution channels or partners… They can't do anything that would actually help me sell my products.*
>
> *--*
>
> *It would be nice if they could give me inside info on how I'm doing and how I'm perceived in (City). They should be more proactive and engaged with their clients when they give information.*

In several conversations, participants described TCS as an organization adept at providing essential – if general – information for businesses entering a given market. The utility of this information varied widely from participant to participant, depending on the nature of their business and their experience. Those most satisfied with the usefulness of information were often exporting packaged or agricultural goods to the general consumer market; participants selling highly specialized products or services within a B2B environment seemed less impressed with the value of what – to their view – represented "basic" information (e.g., information not targeted to their specific needs).

3.2 APPROACHING TCS ON MATTERS INVOLVING GOVERNMENT AFFAIRS IN FOREIGN MARKETS

Participants confronting highly specific issues and problems generally understand that TCS may not be well acquainted with the specific players or circumstances at work; however, many of these participants identify areas where they feel TCS could play a more helpful role than it has played in their experience. In particular, these participants say that TCS should – as a government program operating in a diplomatic capacity in foreign markets – have a natural affinity for and expertise with the operations of governments in their markets, particularly on matters related to government contracting and procurement in the markets they cover.

> *Ironically, TCS is not very well geared towards helping us sell to government authorities... They just don't know who - or even where - the specific contacts are and they have no helpful strategies or specific information about how to sell to governments.*
>
> --
>
> *They had no helpful information for us on the application process… They did make a connection for us to a local government relations firm who was able to help us, but I would think they would be more knowledgeable about government procurement practices since they work in government and work with the governments in the market on diplomatic issues.*
>
> --
>
> *Our issue is permits, health certificates and other regulatory barriers… We also run into issues with corruption once in a while, which always discourages us. We'd appreciate knowing what the regulatory requirements are up front so we have the option of not engaging.*

For a few participants, problems or issues in a market touched on areas where engagement at the political level became necessary to clear market barriers or to obtain faster or more favourable outcomes from regulatory processes (e.g., permit applications). In these discussions, participants routinely said that TCS is not equipped to deliver this sort of intervention. That said, several participants also said they appreciate the (apparently) limited influence the Government of Canada has, from within either bureaucratic or political spheres.

> *Our situation [in a natural resource industry] became very political and our application was ultimately unsuccessful… We don't expect TCS to understand our business, but they should understand how the government in their market works and – ideally – they should have important contacts*

in the market on whom they can prevail on our behalf. But you aren't going to get that sort of capability with TCS… You have to bring it to the Ambassadorial level and even to the Ministerial level, which we did. But, ultimately, Canada didn't have the influence needed to get a favourable outcome.

--

As a Canadian firm we can't compete with the French because they are backed by their representatives in Africa, and their representatives have influence ours don't. So, we get left alone to find our way. I wish we had more support from our government to open doors but that didn't happen. Canada in Africa is a very large opportunity. The way Canada is viewed in Africa should allow us to get more contacts because we have a very good reputation in Africa.

--

For TCS staff stationed abroad, their connections with local governments in the other countries would be helpful. But we haven't seen too much of that yet.

Among the comments on the limitations of the Government of Canada's influence in foreign markets, there were positive comments from participants about the performance of the Government in securing favourable multilateral trade agreements and also in clearing broad obstacles preventing access to specific markets.

Canada is very good when it comes to securing and negotiating multi-national agreements. They've done a fair job dealing with Trump, for example. But they break down when it comes to influence in specific markets.

3.3 Experience with TCS Connecting Clients to Other Government Services and Programs

Although many participants described instances where the Government of Canada does not appear to have a full or nuanced understanding of market conditions or the political influence required to solve problems, TCS was described in particularly positive terms in the area of assistance in accessing other Government of Canada programs and services, and also in providing important connections to programs, services and conferences offered by multinational government organizations, including the United Nations and the World Bank Group.

> *They gave me lots of information! It is a fantastic service! I applied under Canada's Feminist International Assistance Policy… [was sent by the Government of Canada to a conference run by the U.N.] … I received interesting proposals from countries in different regions…. I followed up with my (TCS) contact in Atlantic Canada who referred me to a colleague to help find a different program, but there wasn't one that fit. He was really helpful, though, and I could tell he really wanted to help, but it didn't go anywhere.*
>
> --
>
> *I have gotten information related to government funding programs… TCS was informative and helpful connecting us to exports programs and remained informative and helpful during the application process.*

3.4 Major Challenges to Doing Business Abroad

When asked to identify the major challenges they face when doing business abroad, some participants described a broad range of issues, while others focused on one or two key issues. Generally, participants with less experience pointed to a wider scope of issues, while more experienced participants pointed to a few specific areas of concern, highlighting the varied nature of expectations with regard to TCS support.

> *L'approvisionnement, les régulations des jouets venant de la Chine, l'exportation, les coûts de transportation, la logistique, et les paperasses de la douane.*
>
> --

Being able to enter different markets the way we want to. We (are) now doing it through our films and tools. Be able to choose the markets we want and capitalize on the trends. We need guidance on these. General guidance would be appreciated and overall international strategy would be helpful.

As reflected in the quantitative results, participants commonly said they needed access to contact information in the market, often focusing on contacts for prospective clients or to companies that can provide distribution in the case of retail exports.

The lack of information about international business opportunities is a problem. If they could offer some kind of online platform with information, that could be of assistance. We have a lack of contacts with potential buyers and partners, technology sources, distribution agents… It's a struggle.

A few participants pointed to larger issues, such as the value of the Canadian dollar, as areas that may be outside of the TCS arena, but which nevertheless have an impact on clients' future international business prospects.

The value of the Canadian dollar- Yes that has a huge bearing on it. Because a lot of the countries that would participate in these shows do business in U.S. dollars. When I go to Africa it is usually in U.S dollars but you have to be a little careful.

3.5 TRADE DIVERSIFICATION

Interview participants with significant experience conducting business abroad were not likely to describe information from TCS about expanding to new or different markets as either novel ideas they had not already considered or as practical issues suited to their particular business model. However, participants with less experience expressed more enthusiasm for this type of information.

In our case, we know where our market is because it's a very specific one. The reason we don't go to the United States is simply that we don't have a market for our product there.

--

My product is (…..) that's become popular in a few Southeast Asian markets. I've got enough to deal with to get myself established in those markets. I don't really see expanding to different markets as a top priority.

The central theme across these comments is an issue of timing. When clients approach TCS, they typically do so for help on issues encountered while in the process of expanding to a particular market. They are no longer in the early planning stage when information helpful in choosing new markets is useful; and, similarly, they are often too preoccupied with solving issues in markets where they currently operate to view information about new markets as particularly helpful.

3.6 INTERACTIONS WITH TCS STAFF

Participants typically described their interactions with TCS staff in positive terms. Participants described TCS staff using adjectives like "helpful," "engaged," "attentive," and "genial" or "friendly." Even in instances where the TCS representative could not provide a specific answer or solution, participants usually said they were left with a positive impression of the person or people they dealt with. While positive impressions like these were typical of participants' interactions with TCS staff, some suggested that there can be some variation in the quality of interaction from staff member to staff member and office to office. On the other hand, others commented on the consistency of service delivery, as always helpful. While many participants described examples of TCS staff offering eager and diligent service and attention, in other instances some were described as less experienced, compromising the value of the service. A few emphasized the need for more proactive follow-up on the part of TCS staff. These results emphasize the important role that staff interactions play in the experience clients take away from their interactions.

Generally, participants describe TCS as offering them credibility in the market place (if not necessarily influence), particularly in dealings with foreign governments. In most cases, participants said this was a key benefit for them.

> *….we found her to be absolutely wonderful. She was very helpful in finding potential partners. We looked at the list she sent to see if it makes sense for us, we whittled it down and she contacted them - made introductions, gave them a high level profile of what we do and connected us with them and we took it from there. That's how we found our partner. It's been a very good collaboration.*
>
> --
>
> *He was really helpful and I could tell he really wanted to help but it didn't go anywhere.*
>
> --
>
> *I think we need more individually tailored service, a more proactive service to interact with our representative.*
>
> --

It has always been the same, I have never have a negative experience with them. They are not experts in my field, but they are always quite positive, show an interest in what I am doing.

3.7 SERVICE OUTCOMES

The majority of participants – including those who offered criticisms – typically described the program overall in positive terms, saying it is a helpful resource for their business to turn to when addressing issues or problems in a foreign market, and in providing assistance in the formative stages of an international foray.

In particular, TCS was said to provide very helpful information to clients new to international trade who wish to expand their business into the United States (typically by exporting goods or services, but sometimes looking for assistance with connections to investors or R&D partners). In these discussions, particularly with respect to expanding to the United States, TCS was seen as providing helpful information in general, as well as in addressing specific issues and challenges encountered in specific regions and states.

I was looking for detailed help on how to enter the U.S. market and they were incredibly helpful. They put me in touch with contacts that helped me grow my business in different states. It's crucial to have a resource like TCS since even shipping can be different from one state to the next.

--

The information was helpful. The TCS person in the regional office referred me to the correct regional person in the U.S..

--

The TCS people, like (name of TCS staffer) from, is very responsive and there's a person in who is also very responsive and knowledgeable.

In markets outside of the United States, examples of TCS providing specific help or guidance in solving a problem appear less common. Nevertheless, many of these said they were generally provided with very helpful information. The most enthusiastic responses often seemed to come from participants who are in the planning stages or early implementation phase of an international expansion.

They helped us with networking – finding the right person, the right referral to talk with. They also provided business intelligence on the region. The nice thing is knowing what's happening and issues within the local industry and with the regional companies. They understand the problems

> *and future business opportunities at the regional level, which is information that cannot be gained anywhere else. These two things are very important to an organization like ours that doesn't have the resources to hire consultants or the knowledge about where to look for opportunities.*
>
> --
>
> *In the first 2 or 3 encounters, I wanted to know who the major international investors in Mexico are, where they are, what partners they have, etc. We also wanted to know more about other Canadian or Quebec-based investors and how they were able to set up in Mexico. TCS provided information that was very helpful for us.*

Many participants said TCS either hosted or provided information about conferences and trade shows in a foreign market. Clients typically said these opportunities were useful for them and resulted in well-targeted connections with potential foreign business partners and clients.

> *It was a match making event by players in the gaming industry and studio and we overlap in that industry and we met a lot of people from the U.S. and one person from China.*
>
> --
>
> *I would say that invitations that I get, primarily from (name of TCS staffer), are great. I really appreciate the outreach. They aren't always relevant to me, but I still appreciate getting the invitations and opportunities from them as things to consider doing.*

That said, many participants said that trade shows and conferences could be more narrowly targeted to deliver interesting opportunities. This was most often the case among participants who work in highly specialized areas, often selling to business clients who have very narrow and specific needs.

> *It was less than a year ago. There was a trade delegation going to (Europe). It didn't come to anything, though, as there wasn't anyone from our industry represented on the European side. We didn't make any useful contacts.*

In some cases, these comments led to discussions about the role of TCS, what it can and cannot do, and alignment or misalignment with what participants think it should do.

APPENDIX A
METHODOLOGY

APPENDIX A: Methodology

Appendix A - Detailed Methodology

Two phases of research were conducted to deliver on the objectives: an initial phase of survey research, followed by key informant interviews with 40 clients who answered the survey.

Quantitative Methodology

The survey research was conducted among a sample of n=2965 clients of the TCS who were identified through a contact list maintained by TCS. The surveys required 15 minutes to complete (on average) and were conducted between March 5 and March 27, 2019. The sample of n=2965 obtains a +/-1.8 percentage point margin of error (calculated at a 95% confidence interval).

Response Rate Calculation

The following table calculates the survey response rate using an approach derived from the empirical calculation published by the Market Research and Intelligence Association (MRIA).

Total contacts in sample	**26718**
Invalid address/No email available/Undeliverable	555
Unresolved (U)	**22675**
No response/Out of office response	22675
In-scope – non-responding (IS)	**1078**
Qualified respondent break-off	1078
In-scope – Responding units (R)	**2965**
Completed interviews	2965
Ineligible	0
Response Rate = R/(U+IS+R)	**11.1%**

Sample Characteristics and Discussion of the Potential for Non-Response Bias

The following tables provide a comparison between the characteristics of the entire population of TCS clients (the "universe," as represented through the client contact database maintained by TCS). Given that the final survey sample very closely approximates the characteristics of the total population, no weights were applied to the data.

		Universe		Sample		M.O.E.
		%	Count	%	Count	
Total		--	n=26718	--	n=2965	±1.8
Province	British Columbia	16%	4292	17%	514	±4.3
	Albeta	10%	2605	11%	334	±5.4
	Saskatchewan	2%	521	2%	56	±13.1
	Manitoba	3%	670	3%	78	±11.1
	Ontario	36%	9539	34%	1014	±3.1
	Quebec	20%	5383	18%	531	±4.3
	New Brunswick	2%	496	2%	58	±12.9
	Nova Scotia	4%	963	4%	131	±8.6
	Newfoundland & Labrador	1%	311	1%	44	±14.8
	P.E.I.	1%	177	1%	18	--
	Northwest Territories	0%	17	0%	4	--
	Yukon	0%	14	0%	1	--
	Nunavut	0%	--	0%	--	--
	Ouside canada	6%	1730	6%	180	±7.3
Org. Type	SME	73%	19610	75%	2222	±2.1
	Large	15%	4057	15%	435	±4.7
	Partner	9%	2364	8%	232	±6.4
	Unspecified	3%	687	2%	74	±11.4
TCS Services	Problem Solving	4%	1169	5%	150	±8.0
	Qualified contacts	36%	9726	38%	1121	±2.9
	Market potential assessment	21%	5728	21%	627	±3.9
	Prep for international markets	13%	3456	13%	392	±4.9
	Additional service	7%	1757	7%	199	±6.9
	Referral	18%	4882	16%	474	±4.5
TCS Bus. Line	International Bus Development	91%	24256	92%	2714	±1.9
	Science, Tech. & Innovation	7%	1998	7%	206	±6.8
	Foreign Direct Inv in Canada	2%	456	1%	43	±14.9
	Trade Policy	0%	8	0%	--	--

		Universe		Sample		M.O.E.
		%	Count	%	Count	
Total		--	n=36326	--	n=2965	±1.8
Client Business Sector	Information Technology	14%	3763	13%	399	±4.9
	Agriculture & Processed Foods	11%	3025	11%	332	±5.4
	Education	10%	2752	11%	326	±5.4
	Cleantech	8%	2157	9%	277	±5.9
	Life Sciences	8%	2035	7%	202	±6.9
	Infrastructure/Building Products	7%	1757	6%	182	±7.3
	Oil & Gas	4%	1182	5%	158	±7.8
	Aerospace	4%	1003	4%	104	±9.6
	Government	4%	978	3%	77	±11.2
	All others (=<3% of universe)	30%	8057	30%	903	±3.3
Target Market	United States of America	18%	4769	15%	455	±4.6
	China	9%	2446	9%	258	±6.1
	Mexico	5%	1339	5%	145	±8.1
	India	4%	1063	5%	154	±7.9
	Japan	4%	947	4%	109	±9.4
	Brazil	3%	861	3%	81	±10.9
	France	3%	766	2%	67	±12.0
	Germany	3%	761	3%	90	±10.3
	United Kingdom	3%	704	2%	68	±11.9
	All others (=<2% of universe)	49%	13062	52%	1536	±2.5
Status w. TCS	Client	97%	25999	97%	2881	±1.8
	Non-client	2%	425	1%	40	±15.5
	Potential client	1%	223	1%	33	±17.1
	Local	0%	58	0%	7	--
	Out of business	0%	13	0%	2	--
Other	Woman-owned businesses	2%	610	3%	77	±11.2
	Indigenous-owned businesses	0%	72	0%	8	--
	Canadian Subsidiaries Abroad	6%	1673	6%	173	±7.5
	Foreign Subsidiaries in Canada	5%	1313	4%	120	±8.9

Qualitative Methodology

The qualitative research consisted of one-on-one interviews conducted by telephone among 40 survey respondents. Each interview took between a half hour and 45 minutes to complete. The questions included in the interview guide were primarily open-ended in nature in order to have the participants clarify key study issues in their own words and drawing on their experiences with TCS. The interview participants were selected from the sample of respondents to reflect a lower level of satisfaction with TCS than was realized in the aggregate results among all respondents.

Please note that while the quantitative data provide a statistically representative means of reporting on the satisfaction and attitudes of TCS clients, the qualitative interviews are a non-random exercise that focusing on discourse and anecdotal experiences which – by design – are not reflective of the entire population.

APPENDIX B
SURVEY QUESTIONNAIRE

APPENDIX B: Survey Questionnaire

INTRO

Thank you for your interest in completing this survey.

The survey should take approximately 15 minutes to complete. If you begin the survey and find you need to come back later to complete it, you may re-open the link provided below at a later time and pick the survey up where you left off.

Si vous préférez répondre au sondage en Français, veuillez cliquer sur > Français <.

NOTE: Once all the responses have been tabulated, you will be able to review the aggregate results of the survey at the following website:

www.tradecommissioner.gc.ca/clientsurvey2019.

QA1

How did you initially learn about the Trade Commissioner Service (or TCS)?

Please choose one response

Referral from Export Development Canada (EDC)	1
Referral from the Business Development Bank of Canada (BDC)	2
Referral from the Canadian Commercial Corporation (CCC)	3
Referral from a federal government body	4
Referral from a provincial government body	5
Referral from another organization	6
Internet	7
Third party event	8
TCS event in Canada (please provide details)	9
TCS event abroad (please provide details)	10
Other (please specify)	77
Don't know	99

QA2

Which of the following statements best describes your organization?

Please choose one response

My organization has regularly done business in foreign markets for more than a year	1
My organization has been doing business in foreign markets for less than a year	2
My organization has sporadically done business in foreign markets over the course of several years	3
My organization is actively planning to do business in foreign markets within the next 12 months	4
My organization may pursue foreign business opportunities within the next five years	5
None of the above	98
Don't know/Not sure	99

QA3

For how many years has your organization done business internationally on a regular basis?

Less than two years	1
Between two and five years	2
Between 6 and 10 years	3
More than 10 years	4
Don't know/Not sure	99

QA4 [1,9]

Is your organization currently engaged in any of the following activities?

Please select all that apply

Exporting goods to foreign market(s)	1
Exporting services to foreign market(s)	2
Soliciting foreign investments in your organization	3
Engaged in a partnership or joint venture with a foreign organization	4
Licensing a product, brand or technology from a foreign organization	5
Licensing a product, brand or technology to a foreign organization	6
Seeking international sources of project financing or venture capital	7
Seeking research and development and/or technology partnership opportunities	8
Other (please specify)	77
Don't know / Not sure	99

QA5 [1,10]

Please indicate which – if any – of the following are reasons your organization has approached the TCS in the past.

Please select all that apply

To solve specific, time-sensitive problems my organization encountered in a foreign market	1
To get basic information about doing business in a foreign market (e.g., information about a foreign business culture)	2
To get information about establishing or expanding bricks and mortar operations in a foreign market	3
To get information about exporting goods to a foreign market	4
To get information about distribution channels in a foreign market	5
To get information about exporting services to a foreign market	6
To get assistance with licensing or franchising my organization's technology in a foreign market	7
To get assistance with ongoing sales and marketing efforts in a foreign market	8
To promote educational opportunities or partnerships in a foreign market or to recruit international students	9
Other (please specify)	77
Don't know / Not sure	99

PB1

Using the scale below, please indicate whether you agree or disagree with each of the following statements pertaining to the service you have received from the TCS.

If you have received multiple services, please provide the answer that best reflects your view of the service you have received from TCS overall.

B1A

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

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

B1B

It took a reasonable amount of time to obtain what I needed

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

B1C

The information I received was helpful to understand overall market conditions

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

B1D

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

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

B1E

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

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

B1F

The intelligence provided identified both opportunities and potential difficulties

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

B1G

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

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

B1H

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

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

PC1

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

C1A

Market intelligence and information

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4
Don't know/ Not applicable	99

C1B

Referrals to legal professionals, human resource professionals, translators and other professional service providers

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4
Don't know/ Not applicable	99

C1C

Support for the protection of intellectual property rights, government procurement and/or regulatory matters

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4
Don't know/ Not applicable	99

C1D

Referrals to international business opportunities/sales leads

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4
Don't know/ Not applicable	99

C1E

Referral of technology and/or R&D partnership opportunities

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4
Don't know/ Not applicable	99

C1F

Referrals to other relevant commercial programs and services

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4
Don't know/ Not applicable	99

C1G

Information or advice on locating financial/funding assistance

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4
Don't know/ Not applicable	99

C1H

Recommendations on trade fairs/ trade missions to attend

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4
Don't know/ Not applicable	99

C1I

Practical advice on timing and organizing your business trip

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4
Don't know/ Not applicable	99

C1J

Information about organizations or companies in foreign markets

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4
Don't know/ Not applicable	99

C1K

Understanding responsible business practices in foreign markets

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4
Don't know/ Not applicable	99

PC2

How large of an obstacle are each of the following issues to your organization's activities in international markets?

C2A

The value of the Canadian dollar

No obstacle at all	1
Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2B

Canadian export taxes or permits

No obstacle at all	1
Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2C

Uncertainty of regulatory requirements in other countries

No obstacle at all	1

Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2D

Foreign tariffs or trade barriers

No obstacle at all	1
Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2E

Discriminatory or arbitrary treatment toward Canadian investors or their investments

No obstacle at all	1
Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2F

Lack of access to financing or funding

No obstacle at all	1
Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2G

Concern of violation of your patents and/or intellectual property rights

No obstacle at all	1
Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2I

Linguistic or cultural obstacles

No obstacle at all	1
Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2J

Labour availability and skills

No obstacle at all	1
Minor obstacle	2

Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2K

Corruption

No obstacle at all	1
Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2L

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

No obstacle at all	1
Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2M

Lack of market contacts such as potential buyers and partners, technology sources, agents, etc.

No obstacle at all	1
Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

C2N [0,1]

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

No obstacle at all	1
Minor obstacle	2
Moderate obstacle	3
Major obstacle	4
Don't know/ Not applicable	99

D1

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)?

Very satisfied	1
Satisfied	2
Neutral	3
Unsatisfied	4
Very unsatisfied	5
Don't know	99

D2

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

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

D3

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

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

D4

Which of the following best describes why you are unlikely to use the services of TCS in the future?

Please choose one response

Your organization has developed to a point where the services provided by the TCS are no longer needed	1
Your organization has not engaged in any new international business endeavours since its last interaction with the TCS	2
Your organization did not gain sufficient value from previous interaction(s)	3
You were not satisfied with the quality of service previously provided by the TCS	4
You do not know how to get in touch with the right contact in the TCS	5
Other (please specify)	77
Don't know	99

D5 [1,5]

From which of the following trade promotion organizations did your company receive support in the past 2 years (2017 and 2018)?

Please select all that apply

Export Development Canada (EDC)	1
The Business Development Bank of Canada (BDC)	2
The Canadian Commercial Corporation (CCC)	3
A Provincial government body	4
Another organization (please specify)	5
None	6
Don't know	99

PD6

In each of the following areas, would you say the service you received from TCS was more or less effective than service you have received from another Canadian trade promotion organization in the past two years?

D6A

Timeliness of service

Much more effective	1
Somewhat more effective	2
Neutral	3
Somewhat worse	4
Much worse	5
Don't know	99

D6B

Overall impact of service on your organization

Much more effective	1
Somewhat more effective	2
Neutral	3
Somewhat worse	4
Much worse	5
Don't know	99

D6C

Overall satisfaction with service

Much more effective	1
Somewhat more effective	2
Neutral	3
Somewhat worse	4
Much worse	5
Don't know	99

PE1

Please indicate whether you agree or disagree with each of the following statements. **The TCS helped my organization...**

E1A

Gain confidence to explore or expand in a foreign market

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E1B

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

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E1C

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

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E1D

Overcome or avoid barriers to new foreign business opportunities

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E1E

Improve our profile and credibility in foreign markets

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E1F

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

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E1G

Improve our marketing strategy in foreign market(s)

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E1H

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

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E1I

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

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E1J

Improve our ability to address regulatory problems or other non-tariff barriers encountered in foreign market

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E1K

Obtain information and assistance on corporate social responsibility

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E1L

Gain confidence to diversify product lines exported or business lines pursued in foreign markets

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5
Don't know/ Not applicable	99

E2 [1,11]

Which of the following has your organization done in foreign markets where you received assistance from TCS?

Please select all that apply

Export of goods	1
Export of services	2
New direct investment in my organization	3
Expansion of existing investment in my organization	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/increase in sales after removal of barrier to market access	10
None	11
Other (please specify)	77
Don't know	99

PE3

What was the extent of the contribution made by the TCS in achieving these results?

E3A

Export of goods

No contribution 1	1
2	2
Moderate or partial contribution 3	3
4	4
Essential contribution 5	5
Don't know	99

E3B

Export of services

No contribution 1	1
2	2
Moderate or partial contribution 3	3
4	4
Essential contribution 5	5
Don't know	99

E3C

New direct investment in my organization

No contribution 1	1
2	2
Moderate or partial contribution 3	3
4	4
Essential contribution 5	5
Don't know	99

E3D

Expansion of existing investment in my organization

No contribution 1	1
2	2
Moderate or partial contribution 3	3
4	4
Essential contribution 5	5
Don't know	99

E3E

Investment abroad leading to revenue

No contribution 1	1
2	2
Moderate or partial contribution 3	3
4	4
Essential contribution 5	5
Don't know	99

E3F

Partnership, joint venture or other alliance leading to revenue

No contribution 1	1
2	2
Moderate or partial contribution 3	3
4	4
Essential contribution 5	5
Don't know	99

E3G

Foreign affiliate sales

No contribution 1	1
2	2
Moderate or partial contribution 3	3
4	4
Essential contribution 5	5
Don't know	99

E3H

Licensing of technology

No contribution 1	1
2	2
Moderate or partial contribution 3	3

4	4
Essential contribution 5	5
Don't know	99

E3I

Attracting angel investors or venture capital

No contribution 1	1
2	2
Moderate or partial contribution 3	3
4	4
Essential contribution 5	5
Don't know	99

E3J

Resumption/increase in sales after removal of barrier to market access

No contribution 1	1
2	2
Moderate or partial contribution 3	3
4	4
Essential contribution 5	5
Don't know	99

E3K

Other (please specify)

No contribution 1	1
2	2
Moderate or partial contribution 3	3
4	4
Essential contribution 5	5
Don't know	99

PE4

Would you have achieved these results without assistance from the TCS?

E4A

Export of goods

Yes, we would have achieved the result without assistance from TCS	1
Yes, but it would have taken longer and/or the financial results would have been lower	2
No, we would not have achieved the result without the TCS	3
Don't know	99

E4B

Export of services

Yes, we would have achieved the result without assistance from TCS	1
Yes, but it would have taken longer and/or the financial results would have been lower	2
No, we would not have achieved the result without the TCS	3
Don't know	99

E4C

New direct investment in my organization

Yes, we would have achieved the result without assistance from TCS	1
Yes, but it would have taken longer and/or the financial results would have been lower	2
No, we would not have achieved the result without the TCS	3
Don't know	99

E4D

Expansion of existing investment in my organization

Yes, we would have achieved the result without assistance from TCS	1
Yes, but it would have taken longer and/or the financial results would have been lower	2
No, we would not have achieved the result without the TCS	3
Don't know	99

E4E

Investment abroad leading to revenue

Yes, we would have achieved the result without assistance from TCS	1
Yes, but it would have taken longer and/or the financial results would have been lower	2
No, we would not have achieved the result without the TCS	3
Don't know	99

E4F

Partnership, joint venture or other alliance leading to revenue

Yes, we would have achieved the result without assistance from TCS	1
Yes, but it would have taken longer and/or the financial results would have been lower	2
No, we would not have achieved the result without the TCS	3
Don't know	99

E4G

Foreign affiliate sales

Yes, we would have achieved the result without assistance from TCS	1
Yes, but it would have taken longer and/or the financial results would have been lower	2
No, we would not have achieved the result without the TCS	3
Don't know	99

E4H

Licensing of technology

Yes, we would have achieved the result without assistance from TCS	1
Yes, but it would have taken longer and/or the financial results would have been lower	2
No, we would not have achieved the result without the TCS	3
Don't know	99

E4I

Attracting angel investors or venture capital

Yes, we would have achieved the result without assistance from TCS	1
Yes, but it would have taken longer and/or the financial results would have been lower	2
No, we would not have achieved the result without the TCS	3

Don't know	99

E4J

Resumption/increase in sales after removal of barrier to market access

Yes, we would have achieved the result without assistance from TCS	1
Yes, but it would have taken longer and/or the financial results would have been lower	2
No, we would not have achieved the result without the TCS	3
Don't know	99

E4K

Other (please specify)

Yes, we would have achieved the result without assistance from TCS	1
Yes, but it would have taken longer and/or the financial results would have been lower	2
No, we would not have achieved the result without the TCS	3
Don't know	99

PE5

Again considering outcomes that TCS information or service helped your organization achieve over the past two years, please provide your best estimate of the financial value each outcome delivered to your organization over the course of 2017 and 2018.

Please remember that your responses are confidential. If you are unsure what financial value was achieved, please answer "don't know."

E5A

Export of goods

Please specify	98
Less than $10,000	1
Between $10,000 and $50,000	2
Between $50,000 and $100,000	3
Between $100,000 and $250,000	4
Between $250,000 and $500,000	5
Between $500,000 and $1 million	6
Between $1 million and $5 million	7
Over $ 5 million	8
Don't know/Not sure	99

E5B

Export of services

Please specify	98
Less than $10,000	1
Between $10,000 and $50,000	2
Between $50,000 and $100,000	3
Between $100,000 and $250,000	4
Between $250,000 and $500,000	5
Between $500,000 and $1 million	6
Between $1 million and $5 million	7
Over $ 5 million	8
Don't know/Not sure	99

E5C

New direct investment in my organization

Please specify	98
Less than $10,000	1
Between $10,000 and $50,000	2
Between $50,000 and $100,000	3
Between $100,000 and $250,000	4
Between $250,000 and $500,000	5
Between $500,000 and $1 million	6
Between $1 million and $5 million	7
Over $ 5 million	8
Don't know/Not sure	99

E5D

Expansion of existing investment in my organization

Please specify	98
Less than $10,000	1
Between $10,000 and $50,000	2
Between $50,000 and $100,000	3
Between $100,000 and $250,000	4
Between $250,000 and $500,000	5
Between $500,000 and $1 million	6
Between $1 million and $5 million	7
Over $ 5 million	8
Don't know/Not sure	99

E5E

Investment abroad leading to revenue

Please specify	98
Less than $10,000	1
Between $10,000 and $50,000	2
Between $50,000 and $100,000	3
Between $100,000 and $250,000	4
Between $250,000 and $500,000	5
Between $500,000 and $1 million	6
Between $1 million and $5 million	7
Over $ 5 million	8
Don't know/Not sure	99

E5F

Partnership, joint venture or other alliance leading to revenue

Please specify	98
Less than $10,000	1
Between $10,000 and $50,000	2
Between $50,000 and $100,000	3
Between $100,000 and $250,000	4
Between $250,000 and $500,000	5
Between $500,000 and $1 million	6
Between $1 million and $5 million	7
Over $ 5 million	8
Don't know/Not sure	99

E5G

Foreign affiliate sales

Please specify	98
Less than $10,000	1
Between $10,000 and $50,000	2
Between $50,000 and $100,000	3
Between $100,000 and $250,000	4
Between $250,000 and $500,000	5
Between $500,000 and $1 million	6
Between $1 million and $5 million	7
Over $ 5 million	8
Don't know/Not sure	99

E5H

Licensing of technology

Please specify	98
Less than $10,000	1
Between $10,000 and $50,000	2
Between $50,000 and $100,000	3
Between $100,000 and $250,000	4
Between $250,000 and $500,000	5
Between $500,000 and $1 million	6
Between $1 million and $5 million	7
Over $ 5 million	8
Don't know/Not sure	99

E5I

Attracting angel investors or venture capital

Please specify	98
Less than $10,000	1
Between $10,000 and $50,000	2
Between $50,000 and $100,000	3
Between $100,000 and $250,000	4
Between $250,000 and $500,000	5
Between $500,000 and $1 million	6
Between $1 million and $5 million	7
Over $ 5 million	8
Don't know/Not sure	99

E5J

Resumption/increase in sales after removal of barrier to market access

Please specify	98
Less than $10,000	1
Between $10,000 and $50,000	2
Between $50,000 and $100,000	3
Between $100,000 and $250,000	4
Between $250,000 and $500,000	5
Between $500,000 and $1 million	6
Between $1 million and $5 million	7
Over $ 5 million	8
Don't know/Not sure	99

E5K

Other (Please specify)

Please specify	98
Less than $10,000	1
Between $10,000 and $50,000	2
Between $50,000 and $100,000	3
Between $100,000 and $250,000	4
Between $250,000 and $500,000	5
Between $500,000 and $1 million	6
Between $1 million and $5 million	7
Over $ 5 million	8
Don't know/Not sure	99

F1

How long has your organization exported goods or services to one or more foreign markets?

Less than one year	1
Between one and two years	2
Between two and five years	3
Between five and 10 years	4
More than 10 years	5
My organization does not currently export goods or services	6
Don't know/Not sure	99

F2

On an annual basis, please provide an estimate of the total value of goods and services your organization exports.

Please specify	98
Less than $1 million	1
$1 million to less than $5 million	2
$5 million to less than $25 million	3
$25 million to less than $100 million	4
$100 million to less than $500 million	5
$500 million to less than $1 billion	6
More than $1 billion	7
Not applicable	96
Decline	97
Don't know	99

F3

Does your organization export goods and services...

Only to the United States	1
To the United States and other foreign markets	2
To foreign markets excluding the United States	3
Don't know/Not sure	99

F4

What are the largest three markets for your organization in terms of the total value of exports?

Please select up to three.

Please specify	998
Afghanistan	1
Albania	2
Algeria	3
American Samoa	4
Andorra	5
Angola	6
Anguilla	7
Antigua and Barbuda	8
Argentina	9
Armenia	10
Aruba	11
Australia	12
Austria	13
Azerbaijan	14
Bahamas	15
Bahrain	16
Bangladesh	17
Barbados	18
Belarus	19
Belgium	20
Belize	21
Benin	22
Bermuda	23
Bhutan	24
Bolivia	25
Bosnia and Herzegovina	26
Botswana	27
Bouvet Island	28
Brazil	29
Brunei Darussalam	30
Bulgaria	31
Burkina Faso	32
Burundi	33
Cambodia	34
Cameroon	35
Cape Verde	36
Cayman Islands	37
Central African Republic	38
Chad	39
Chile	40
China	41
Christmas Island	42
Cocos (Keeling) Islands	43
Colombia	44
Comoros	45
Congo	46
Cook Islands	47

Costa Rica	48
Côte D'Ivoire	49
Croatia	50
Cuba	51
Curaçao	52
Cyprus	53
Czech Republic	54
Denmark	55
Djibouti	56
Dominica	57
Dominican Republic	58
Ecuador	59
Egypt	60
El Salvador	61
Eritrea	62
Estonia	63
Ethiopia	64
Equatorial Guinea	65
Faroe Islands	66
Fiji	67
Finland	68
France	69
French Guiana	70
French Polynesia	71
Gabon	72
Gambia	73
Georgia	74
Germany	75
Ghana	76
Gibraltar	77
Greece	78
Greenland	79
Grenada	80
Guadeloupe	81
Guam	82
Guatemala	83
Guinea	84
Guinea-Bissau	85
Guyana	86
Haiti	87
Heard Island and McDonald Islands	88
Honduras	89
Hong Kong	90
Hungary	91
Iceland	92
India	93
Indonesia	94
Iran	95
Iraq	96
Ireland	97
Israel	98
Italy	99
Jamaica	100
Japan	101

Jordan	102
Kazakhstan	103
Kenya	104
Kiribati	105
Kuwait	106
Kyrgyzstan	107
Laos	108
Latvia	109
Lebanon	110
Lesotho	111
Liberia	112
Libya	113
Liechtenstein	114
Lithuania	115
Luxembourg	116
Macau	117
Macedonia	118
Madagascar	119
Malawi	120
Malaysia	121
Maldives	122
Mali	123
Malta	124
Marshall Islands	125
Martinique	126
Mauritania	127
Mauritius	128
Mayotte	129
Mexico	130
Micronesia, Federated States of	131
Moldova	132
Monaco	133
Mongolia	134
Montenegro	135
Montserrat	136
Morocco	137
Mozambique	138
Myanmar	139
Namibia	140
Nauru	141
Nepal	142
Netherlands	143
Netherlands Antilles	144
New Caledonia	145
New Zealand	146
Nicaragua	147
Niger	148
Nigeria	149
Niue	150
Norfolk Island	151
Northern Mariana Islands	152
North Korea	153
Norway	154
Oman	155

Trinidad and Tobago	210
Tunisia	211
Turkey	212
Turkmenistan	213
Turks and Caicos Islands	214
Tuvalu	215
Uganda	216
Ukraine	217
United Arab Emirates	218
United Kingdom	219
United States	220
United States Minor Outlying Islands	221
Uruguay	222
Uzbekistan	223
Vanuatu	224
Venezuela	225
Vietnam	226
Wallis and Futuna	227
Western Sahara	228
Yemen	229
Zambia	230
Zimbabwe	231
Don't know / No response	9999

F5

Which three markets do you expect to be the fastest growing markets for your exports over the next three years?

Please select up to three.

PF6

How challenging do you consider each of the following issues to be? Please rate your view using the scale provided.

F6A

Administrative obstacles in Canada (e.g., rules, regulations and legal requirements)

No challenge at all	1
Minor challenge	2
Moderate challenge	3
Major challenge	4
Don't know/ Not applicable	99

F6B

Administrative obstacles outside of Canada (e.g., foreign customer requirements, product standards, technology requirements)

No challenge at all	1
Minor challenge	2
Moderate challenge	3
Major challenge	4
Don't know/ Not applicable	99

F6C

Border obstacles (e.g., tariffs, non-tariff barriers, import quotas, customs duties, and border security issues)

No challenge at all	1
Minor challenge	2
Moderate challenge	3
Major challenge	4
Don't know/ Not applicable	99

F6D

Logistical obstacles (e.g., transportation costs, and brokerage fees)

No challenge at all	1
Minor challenge	2
Moderate challenge	3
Major challenge	4
Don't know/ Not applicable	99

F6E

Market knowledge issues (e.g., lack of knowledge of local language and culture, unaware of potential export markets)

No challenge at all	1
Minor challenge	2
Moderate challenge	3
Major challenge	4
Don't know/ Not applicable	99

F6F

Intellectual property issues (e.g., concerns of violation of IP rights)

No challenge at all	1
Minor challenge	2
Moderate challenge	3
Major challenge	4
Don't know/ Not applicable	99

F6G

Lack of financing/inadequate cash-flow

No challenge at all	1
Minor challenge	2
Moderate challenge	3
Major challenge	4
Don't know/ Not applicable	99

F6H

Financial risk (e.g., longer payment terms or risk of non-payment from customers)

No challenge at all	1
Minor challenge	2
Moderate challenge	3
Major challenge	4
Don't know/ Not applicable	99

G1 [1,5]

To the best of your knowledge, does your organisation identify to one or more of the following type of businesses?

Women owned	1
Indigenous owned	2
LBGTQ2 owned	3
Visible minority owned	4
Persons with a disability owned	5
None of the above	98
Don't know/Not sure	99

QH1

The following questions about your organization will help with the analysis of survey results. Please note that all information collected in the survey will be reported in aggregate form only. Information that could identify individual organizations or businesses will remain confidential.

Which of the following best describe your role at your company?

Executive	1
Middle Management	2
Employee	3
Consultant/Sole Proprietor	4
Other (please specify)	77
Decline	98

QH2

Using your best estimate, how many employees do you have in your organization? (Please include employees from all locations in your organization, within and outside of Canada.)

Self-employed	1
1 to 9	2
10 to 49	3
50 to 99	4
100 to 249	5
250 to 499	6
500 or more	7
Don't know	99
Decline	98

QH3

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

Less than $1 million	1
$1 million to less than $5 million	2
$5 million to less than $25 million	3
$25 million to less than $100 million	4
$100 million to less than $500 million	5

$500 million to less than $1 billion	6
More than $1 billion	7
Not applicable	97
Decline	98
Don't know	99

I1

As part of this research, we are interviewing a few randomly selected respondents. The interviews would be conducted by telephone, would take about a half hour to complete and we would provide an incentive of $100 in thanks for your participation.

Would you be willing to participate in an interview?

Yes, you can contact me at the same email address	1
Yes, use phone as preferred means.	2
Yes, contact me at the following email address	3
No thanks	99

I2

Great! We'll be in touch with you if you are selected to participate. Please kindly provide the best telephone number to use in order to schedule the interview.

Please provide your telephone number with area code and no spaces.

Telephone:	77

THNK

Thank you for taking the time to complete this survey. Your input is valuable as we seek to enhance the services we offer to Canadian exporters. If you have any further questions regarding this survey, please contact TCSsurvey-sondageSDC@international.gc.ca.

Visit ekos.com

Appendix C
Interview Guide

APPENDIX C: Interview Guide

Overview

EKOS plans to conduct 40 one-on-one, in-depth interviews among a selection of survey respondents willing to participate in an interview.

Screening Criteria

The screening criteria for the interviews will be based on the responses that potential recruits gave during the survey. Ultimately, the nature of the segmentation will depend on how many participants agree to do a follow up and how they responded in the survey.

As a practical matter, we suggest segmentation approaches that separate participants based on important dichotomies, such as:

- Whether they are more or less satisfied with TCS (D1);
- Whether they contacted TCS for an urgent need or for other (less time-sensitive) information or service (A5);
- Whether they are very senior business people with years of experience or whether they are relative neophytes (A2/A3);
- Whether they are smaller or larger companies (H2/H3).

Using dichotomies like the above, we would establish minimum numbers of participants fitting each of the criteria above. For example, we could look to complete a minimum of 10 interviews with participants fitting each criteria (i.e., more satisfied, less satisfied, time-sensitive needs, non-time-sensitive needs, experienced, less experienced, larger and smaller companies). Some participants may match several criteria; others only one. The objective would be to reach the minimum targets within the 40 interviews, resulting in recruits who represent a diverse array of views with respect to TCS.

Introduction

Thank you for agreeing to complete this interview. Before we begin, it is important to note the following things:

- Your participation in the interview is voluntary and confidential. We do not share your personal information with our client and we do not report on the results of this interview in a way that would identify you personally or your organization.
- We are taking an audio recording of the interviews. This is for the purposes of reporting and analysis. The recordings we take are destroyed when the project is complete.
- You aren't expected to be an expert on the things we'll be talking about; there are no right or wrong answers.
- The interview should take between 30 and 45 minutes to complete.

Section A: Opening

Let's start by getting to know you a bit better…

- Can you briefly describe your business and your job within it?
- Can you describe the sorts of international business your company does?
    - What are the top markets for your business?

Section B: Past Experience with TCS

Can you please describe the last interaction you had with TCS?

- How long ago was it?
- Did you get the service or information you needed to solve your issue?
- Was the experience positive or negative? Why?
- How does your last experience with TCS compare to your typical experience with them? Better or worse? Why?

Is there some information or service that TCS provides which you have found to be particularly helpful to your business?

- Please describe…
- Have you ever received information or service from TCS that was essential to realizing success in your international business? (Please describe.)

In what areas do you think TCS could do a better job providing information or service to businesspeople like you?

- Please describe…
- Are there things TCS offers, but which you have found to not meet your needs?

- Are there things that TCS should be offering, but doesn't?

When you approach TCS, is it typically to solve an immediate or pressing problem you're having or is it to get information and service that may be important, but isn't necessarily to solve an immediate issue you're having?

- IF URGENT/IMMEDIATE PROBLEMS:
  - Do you find TCS responsive in cases where you have an urgent need?
  - Do you have other information or service needs that are not as urgent which you approach TCS about?
- IF NON-URGENT:
  - If you had a crisis situation requiring a solution fast, would you approach TCS or not? Why?/Why not?

Thinking about your interactions with TCS in the past, can you please describe your experience with TCS staff…

- Are they knowledgeable?
- Prompt?
- Professional?
- Helpful?
- Do they seem to understand your issues?

Looking ahead, what would you describe as the major challenges you face in doing business internationally?

- PROBES:
  - The value of the Canadian dollar
  - Canadian export taxes or permits
  - Uncertainty of regulatory requirements in other countries
  - Known foreign tariffs or trade barriers
  - Discriminatory or arbitrary treatment toward Canadian investors or their investments
  - Lack of access to financing or funding
  - Concern of violation of your patents and/or intellectual property rights
  - Linguistic or cultural obstacles
  - Labour availability and skills
  - Corruption
  - Lack of information about international business opportunities
  - Lack of market contacts such as potential buyers and partners, technology sources, agents, etc.
- Are these areas where TCS currently provides you with information/service? IF NOT: Should they be providing information or service in these areas?

Section C: Trade Diversification

You indicated in the survey that you export… [only to the US/ only to countries other than the US/ to the US and other countries].

- [IF US ONLY:] Why aren't you doing business in countries other than the US?
- [IF ELSEWHERE:] Why aren't you doing business in the US?

Section D: The TCS Brand

If you had to describe the TCS using a single word or phrase, what would it be, and why?

- Alternate approaches: If TCS was a car, what kind of car would it be? If TCS was a company in the private sector, what kind of company would they be?

Are there other organizations or professionals who offer information or service comparable to what you can get from TCS?

- Which organizations or professionals are you thinking of?
- Have you used the services of these organizations/professionals?
- Is the information or service provided by other organizations/professionals better, the same or worse than what TCS offers?
- Is there anything that TCS provides that you can't get anywhere else? What do they offer that is totally unique?

Conclusions

Are there any final comments? Any essential piece of advice you would offer to the people working on making TCS more responsive to your needs?

APPENDIX D
DETAILED SEGMENTATION TABLES

APPENDIX D: Detailed Segmentation Tables

Table 1: Demographics

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	*All respondents*	*1*	*2*	*3*	*4*
Base	--	*2965*	*270*	*447*	*1030*	*895*
Region	B.C.	24%	18%	27%	24%	23%
-	Alberta	11%	10%	12%	11%	13%
-	Sask./Man.	5%	5%	4%	5%	5%
-	Ontario	34%	40%	35%	33%	33%
-	Quebec	18%	22%	15%	18%	16%
-	Atlantic	8%	5%	7%	9%	10%
Organization	SME	75%	84%	72%	76%	74%
Type	Large	15%	8%	14%	16%	16%
-	Partner	8%	5%	10%	7%	9%
-	Unspecified	2%	3%	4%	2%	2%
TCS	Qualified contacts	38%	41%	40%	36%	37%
Services	Market potential assessment	21%	19%	21%	21%	23%
-	Referral	16%	12%	15%	18%	15%
-	Prep for international markets	13%	17%	11%	14%	12%
-	Additional service	7%	5%	7%	7%	7%
-	Problem Solving	5%	6%	6%	4%	5%
TCS	International Bus Development	92%	95%	93%	91%	91%
Business	Science, Tech. & Innovation	7%	4%	5%	7%	8%
Line	Foreign Direct Inv in Canada	1%	1%	2%	2%	1%
-	Trade Policy	0%	0%	0%	0%	0%
Role at	Executive	61%	72%	62%	62%	59%
Company	Middle Management	21%	15%	20%	21%	24%
-	Employee	10%	6%	9%	9%	9%
-	Consultant/Sole Proprieter	8%	7%	9%	8%	8%

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	***All respondents***	***1***	***2***	***3***	***4***
# of	<10	28%	30%	30%	27%	27%
Employees	10-99	40%	41%	38%	42%	39%
-	100-499	14%	15%	13%	14%	14%
-	500+	18%	13%	19%	18%	20%
Sales	<$1m	31%	30%	35%	28%	31%
-	$1-$5m	24%	29%	21%	25%	23%
-	$5-$25m	23%	18%	21%	25%	22%
-	$25m-$1b	19%	20%	19%	20%	22%
-	$1b+	2%	3%	3%	2%	2%
Markets	Only to the United States	7%	10%	7%	6%	7%
-	To the United States and other foreign markets	70%	67%	67%	72%	70%
-	To foreign markets excluding the United States	23%	22%	26%	22%	23%
Summary of	Key Proactive Sectors	40%	39%	39%	44%	38%
Sectors	Key Responsive Sectors / All Other Sectors	39%	39%	44%	36%	40%
-	Ongoing Proactive Sectors	20%	22%	17%	21%	23%
Experience	Less than one year	4%	5%	4%	4%	4%
as Exporter	Between one and two years	8%	7%	8%	9%	8%
-	Between two and five years	16%	17%	17%	16%	17%
-	Between five and 10 years	15%	16%	18%	15%	15%
-	More than 10 years	52%	52%	48%	53%	52%
-	My organization does not currently export goods or services	3%	3%	4%	3%	2%

Table 2: Service Attributes

--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	***All respondents***	***1***	***2***	***3***	***4***
Base	*2779*	*256*	*438*	*1002*	*884*
Staff understood my business	85%	43%	**97%**	83%	**95%**
Provided with useful intel on market conditions	82%	39%	**98%**	78%	**93%**
Provided with appropriate contacts	78%	34%	97%	72%	89%
Took a reasonable amount of time to get service	78%	32%	96%	72%	89%
Was provided intelligence that identified opportunities and potential difficulties	78%	36%	95%	71%	88%
Provided with intel that helped address problem(s)	77%	31%	97%	71%	89%
Have received consistent quality of service	75%	47%	89%	70%	83%
Provided useful intel on local companies/organizations	72%	26%	94%	62%	86%
Provided with contacts when staff could not assist directly	71%	21%	96%	61%	86%
Gain confidence to explore or expand in a foreign market	68%	16%	98%	53%	85%
Gain access to customers and partners that would have been difficult to obtain without the support of the TCS	66%	14%	97%	53%	82%
Gain access to intelligence and information that would have been difficult to obtain without the support of the TCS	70%	18%	98%	55%	89%
Overcome or avoid barriers to new foreign business opportunities	54%	2%	99%	23%	84%
Improve our profile and credibility in foreign markets	67%	15%	97%	51%	84%
Improve our knowledge of the competitive environment in foreign market(s)	65%	10%	98%	47%	87%
Improve our marketing strategy in foreign market(s)	55%	1%	99%	24%	86%
Avoid mistakes, delays or incurring additional costs in pursuing an opportunity	53%	0%	99%	18%	85%
Obtain and assess market or industry information which helped us decide whether or not to pursue an opportunity	63%	8%	98%	42%	85%
Improve our ability to address regulatory problems or other non-tariff barriers encountered in foreign market	49%	1%	98%	14%	77%

--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	***All respondents***	***1***	***2***	***3***	***4***
Obtain information and assistance on corporate social responsibility	38%	2%	92%	9%	53%
Gain confidence to diversify product lines exported or business lines pursued in foreign markets	43%	1%	99%	11%	64%

Table 3: Satisfaction

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	***All respondents***	***1***	***2***	***3***	***4***
Overall Satisfaction	Very Satisfied/Satisfied	83%	32%	99%	81%	96%
-	Neutral	12%	31%	1%	17%	4%
-	Very Dissatisfied/ Dissatisfied	5%	38%	0%	2%	0%
-	Total	2871	262	446	1024	893
Likelihood to	Definitely/Probably	85%	38%	99%	83%	96%
Recommend	Possibly	11%	30%	1%	15%	3%
-	Definitely/Probably Not	4%	32%	0%	3%	0%
-	Total	2873	256	446	1021	894
Likelihood to Use Again	Definitely/Probably	87%	49%	98%	86%	98%
-	Possibly	10%	32%	2%	13%	2%
-	Definitely/Probably Not	2%	20%	0%	1%	0%
-	Total	2554	251	416	983	845

Table 4: Needs

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	***All respondents***	***1***	***2***	***3***	***4***
Market intelligence and Information	Great deal/Some Assistance	87%	79%	96%	85%	90%
-	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	13%	21%	4%	15%	10%
-	**Total**	**2596**	**245**	**394**	**948**	**807**
Referrals to professional service	Great deal/Some Assistance	57%	49%	75%	48%	65%
providers	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	43%	51%	25%	52%	35%
-	**Total**	**2462**	**225**	**376**	**911**	**760**
Support for IP rights, govt. procurement	Great deal/Some Assistance	57%	46%	73%	49%	63%
and/or regulations	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	43%	54%	27%	51%	38%
-	**Total**	**2741**	**259**	**415**	**993**	**844**
Referrals to intl. opportunities/sales	Great deal/Some Assistance	85%	78%	93%	82%	88%
leads	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	15%	22%	7%	18%	12%
-	**Total**	**2391**	**224**	**365**	**871**	**743**
Referral to tech and/or RD partnerships	Great deal/Some Assistance	56%	46%	76%	48%	58%
-	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	44%	54%	24%	52%	42%
-	**Total**	**2533**	**242**	**396**	**897**	**799**
Referrals to relevant programs and services	Great deal/Some Assistance	73%	67%	87%	66%	76%
-	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	27%	33%	13%	34%	24%
-	**Total**	**2446**	**227**	**377**	**898**	**750**

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	***All respondents***	***1***	***2***	***3***	***4***
Info on locating financial/funding	Great deal/Some Assistance	58%	48%	67%	52%	62%
assistance	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	42%	52%	33%	48%	38%
-	**Total**	**2775**	**257**	**426**	**997**	**860**
Recommendations on trade fairs/ trade	Great deal/Some Assistance	77%	63%	92%	71%	83%
missions	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	23%	37%	8%	29%	17%
-	**Total**	**2669**	**248**	**417**	**966**	**826**
Advice on timing and organizing a trip	Great deal/Some Assistance	57%	42%	79%	48%	66%
-	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	43%	58%	21%	52%	34%
-	**Total**	**2778**	**255**	**433**	**998**	**859**
Info on organizations or companies	Great deal/Some Assistance	84%	76%	94%	80%	90%
-	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	16%	24%	6%	20%	10%
-	**Total**	**2705**	**251**	**426**	**973**	**837**
Understanding responsible business	Great deal/Some Assistance	73%	56%	89%	66%	81%
practices abroad	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	27%	44%	11%	34%	19%
-	**Total**	**2689**	**251**	**410**	**977**	**822**
The value of the Canadian dollar	Great deal/Some Assistance	66%	66%	68%	68%	64%
-	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	34%	34%	32%	32%	36%
-	**Total**	**2336**	**231**	**361**	**867**	**695**
Canadian export taxes or permits	Great deal/Some Assistance	69%	71%	70%	70%	68%
-	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	31%	29%	30%	30%	32%

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	***All respondents***	***1***	***2***	***3***	***4***
-	**Total**	**2602**	**251**	**400**	**951**	**781**
Uncertainty of regulatory requirements	Great deal/Some Assistance	38%	39%	43%	42%	32%
in other countries	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	62%	61%	57%	58%	68%
-	**Total**	**2456**	**242**	**382**	**907**	**724**
Foreign tariffs or trade barriers	Great deal/Some Assistance	48%	50%	47%	50%	45%
-	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	52%	50%	53%	50%	55%
-	**Total**	**2075**	**203**	**327**	**785**	**622**
Discriminatory or arbitrary treatment	Great deal/Some Assistance	71%	69%	72%	73%	70%
toward Canadian	Moderate Assistance	0%	0%	0%	0%	0%
investors or their investments	Little/No Assistance	29%	31%	28%	27%	30%
-	**Total**	**2432**	**236**	**371**	**902**	**728**
Lack of access to	Great deal/Some Assistance	47%	46%	48%	50%	45%
financing or funding	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	53%	54%	52%	50%	55%
-	**Total**	**2284**	**226**	**357**	**846**	**669**
Concern of violation of	Great deal/Some Assistance	53%	53%	54%	55%	52%
your patents and/or	Moderate Assistance	0%	0%	0%	0%	0%
intellectual property rights	Little/No Assistance	47%	47%	46%	45%	48%
-	**Total**	**2773**	**263**	**425**	**994**	**849**
Linguistic or cultural Obstacles	Great deal/Some Assistance	66%	66%	66%	67%	63%
-	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	34%	34%	34%	33%	37%
-	**Total**	**2420**	**236**	**372**	**905**	**728**

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	***All respondents***	***1***	***2***	***3***	***4***
Labor availability and skills	Great deal/Some Assistance	67%	66%	68%	70%	66%
-	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	33%	34%	32%	30%	34%
-	**Total**	**2344**	**228**	**357**	**864**	**716**
Corruption	Great deal/Some Assistance	56%	62%	57%	56%	53%
-	Moderate Assistance	0%	0%	0%	0%	0%
-	Little/No Assistance	44%	38%	43%	44%	47%
-	**Total**	**2598**	**255**	**396**	**951**	**788**
Lack of information about international	Great deal/Some Assistance	47%	34%	50%	50%	47%
business opportunities	Moderate Assistance	0%	0%	0%	0%	0%
(i.e. export sales leads)	Little/No Assistance	53%	66%	50%	50%	53%
-	**Total**	**2634**	**258**	**405**	**964**	**799**
Lack of market contacts such as potential	Great deal/Some Assistance	42%	30%	44%	43%	42%
buyers and partners,	Moderate Assistance	0%	0%	0%	0%	0%
technology sources, agents, etc.	Little/No Assistance	58%	70%	56%	57%	58%
-	**Total**	**2861**	**265**	**445**	**1020**	**891**

Table 5: Impact

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	*All respondents*	*1*	*2*	*3*	*4*
Export of goods	Major/Moderate	70%	35%	88%	62%	81%
-	Minimal	25%	61%	9%	35%	15%
-	DK	5%	4%	3%	4%	5%
-	**Total**	**920**	**62**	**179**	**326**	**319**
Export of services	Major/Moderate	70%	26%	87%	61%	81%
-	Minimal	24%	71%	9%	33%	14%
-	DK	6%	3%	4%	6%	5%
-	**Total**	**126**	**9**	**33**	**35**	**47**
New direct investment	Major/Moderate	62%	33%	76%	54%	64%
in my organization	Minimal	29%	44%	21%	40%	26%
-	DK	9%	22%	3%	6%	11%
-	**Total**	**156**	**6**	**47**	**35**	**62**
Expansion of existing	Major/Moderate	67%	50%	81%	54%	68%
investment in my	Minimal	23%	50%	11%	37%	23%
organization	DK	10%	0%	9%	9%	10%
-	**Total**	**174**	**11**	**41**	**50**	**68**
Investment abroad	Major/Moderate	60%	27%	85%	44%	65%
leading to revenue	Minimal	34%	64%	12%	52%	26%
-	DK	6%	9%	2%	4%	9%
-	**Total**	**643**	**25**	**135**	**220**	**247**
Partnership, joint	Major/Moderate	74%	28%	84%	66%	81%
venture or other alliance	Minimal	22%	68%	15%	30%	15%
leading to revenue	DK	4%	4%	1%	4%	4%
-	**Total**	**144**	**5**	**35**	**39**	**64**
Foreign affiliate sales	Major/Moderate	71%	20%	86%	56%	77%
-	Minimal	25%	80%	9%	41%	19%
-	DK	4%	0%	6%	3%	5%
-	**Total**	**160**	**9**	**37**	**49**	**63**
Licensing of technology	Major/Moderate	57%	11%	78%	43%	63%
-	Minimal	31%	67%	16%	45%	24%
-	DK	12%	22%	5%	12%	13%

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	***All respondents***	***1***	***2***	***3***	***4***
-	**Total**	**125**	**2**	**23**	**49**	**48**
Attracting angel investors or venture capital	Major/Moderate	62%	50%	96%	41%	69%
	Minimal	29%	50%	4%	47%	23%
	DK	9%	0%	0%	12%	8%
-	**Total**	**126**	**5**	**43**	**29**	**49**
Resumption/increase in sales after removal of barrier to market access	Major/Moderate	76%	20%	81%	79%	76%
	Minimal	19%	60%	19%	21%	14%
	DK	5%	20%	0%	0%	10%
-	**Total**	**1018**	**72**	**182**	**370**	**351**
Export of goods	More time, less money or would not have happened	64%	21%	86%	51%	79%
-	Would have achieved without TCS	26%	69%	8%	34%	15%
-	DK	10%	10%	6%	15%	6%
-	**Total**	**920**	**62**	**179**	**326**	**319**
Export of services	More time, less money or would not have happened	65%	18%	83%	53%	78%
-	Would have achieved without TCS	25%	77%	12%	35%	12%
-	DK	10%	5%	6%	12%	10%
-	**Total**	**126**	**9**	**33**	**35**	**47**
New direct investment in my organization	More time, less money or would not have happened	58%	11%	79%	54%	57%
-	Would have achieved without TCS	26%	78%	15%	23%	26%
-	DK	16%	11%	6%	23%	17%
-	**Total**	**156**	**6**	**47**	**35**	**62**
Expansion of existing investment in my organization	More time, less money or would not have happened	63%	0%	77%	63%	61%
-	Would have achieved without TCS	25%	100%	11%	29%	26%

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	*All respondents*	*1*	*2*	*3*	*4*
-	DK	12%	0%	13%	9%	13%
-	**Total**	**174**	**11**	**41**	**50**	**68**
Investment abroad leading to revenue	More time, less money or would not have happened	57%	9%	78%	46%	62%
-	Would have achieved without TCS	33%	91%	20%	46%	22%
-	DK	10%	0%	2%	8%	16%
-	**Total**	**643**	**25**	**135**	**220**	**247**
Partnership, joint venture or other alliance leading to revenue	More time, less money or would not have happened	69%	20%	84%	60%	74%
-	Would have achieved without TCS	21%	72%	10%	27%	15%
-	DK	11%	8%	7%	12%	11%
-	**Total**	**144**	**5**	**35**	**39**	**64**
Foreign affiliate sales	More time, less money or would not have happened	70%	40%	86%	59%	72%
-	Would have achieved without TCS	19%	60%	6%	28%	17%
-	DK	10%	0%	9%	13%	11%
-	**Total**	**160**	**9**	**37**	**49**	**63**
Licensing of technology	More time, less money or would not have happened	53%	11%	76%	43%	56%
-	Would have achieved without TCS	31%	78%	14%	41%	25%
-	DK	16%	11%	11%	16%	19%
-	**Total**	**125**	**2**	**23**	**49**	**48**
Attracting angel investors or venture capital	More time, less money or would not have happened	62%	0%	87%	53%	60%
-	Would have achieved without TCS	23%	50%	4%	29%	27%
-	DK	15%	50%	9%	18%	13%

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	***All respondents***	***1***	***2***	***3***	***4***
-	**Total**	**126**	**4**	**44**	**29**	**49**
Resumption/increase in sales after removal of barrier to market access	More time, less money or would not have happened	82%	50%	91%	72%	82%
-	Would have achieved without TCS	8%	50%	2%	21%	2%
-	DK	10%	0%	7%	7%	16%
-	**Total**	**1018**	**72**	**182**	**370**	**351**
Export of goods	$500k+	19%	17%	28%	15%	19%
-	$100k to $500k	14%	13%	15%	14%	16%
-	$100k or less	31%	39%	29%	32%	28%
-	Other/DK	36%	32%	27%	39%	37%
-	**Total**	**920**	**62**	**179**	**326**	**319**
Export of services	$500k+	13%	16%	18%	13%	12%
-	$100k to $500k	13%	10%	19%	10%	14%
-	$100k or less	34%	44%	26%	35%	35%
-	Other/DK	40%	31%	37%	42%	39%
-	**Total**	**126**	**9**	**33**	**35**	**47**
New direct investment	$500k+	27%	11%	39%	26%	23%
in my organization	$100k to $500k	11%	0%	3%	14%	15%
-	$100k or less	21%	56%	12%	29%	17%
-	Other/DK	40%	33%	45%	31%	45%
-	**Total**	**156**	**6**	**47**	**35**	**62**
Expansion of existing	$500k+	19%	33%	30%	11%	16%
investment in my	$100k to $500k	15%	0%	9%	17%	23%
organization	$100k or less	19%	67%	13%	23%	16%
-	Other/DK	47%	0%	49%	49%	45%
-	**Total**	**174**	**11**	**41**	**50**	**68**
Investment abroad	$500k+	21%	9%	34%	18%	19%
leading to revenue	$100k to $500k	11%	9%	10%	12%	13%
-	$100k or less	24%	55%	20%	26%	21%
-	Other/DK	44%	27%	37%	44%	47%
-	**Total**	**643**	**25**	**135**	**220**	**247**

--	--	--	SME Executives	SME Globalists	Big - Luke Warm	Big - Ecstatic
--	--	*All respondents*	*1*	*2*	*3*	*4*
Partnership, joint	$500k+	10%	0%	15%	9%	11%
venture or other alliance	$100k to $500k	11%	8%	13%	10%	12%
leading to revenue	$100k or less	28%	44%	30%	28%	25%
-	Other/DK	51%	48%	43%	53%	53%
-	**Total**	**144**	**5**	**35**	**39**	**64**
Foreign affiliate sales	$500k+	17%	0%	14%	13%	20%
-	$100k to $500k	12%	0%	11%	18%	9%
-	$100k or less	34%	40%	34%	44%	28%
-	Other/DK	38%	60%	40%	26%	42%
-	**Total**	**160**	**9**	**37**	**49**	**63**
Licensing of technology	$500k+	11%	11%	19%	8%	8%
-	$100k to $500k	11%	0%	14%	10%	13%
-	$100k or less	29%	22%	27%	29%	32%
-	Other/DK	49%	67%	41%	53%	48%
-	**Total**	**125**	**2**	**23**	**49**	**48**
Attracting angel	$500k+	18%	0%	22%	16%	19%
investors or venture	$100k to $500k	14%	50%	22%	8%	15%
capital	$100k or less	17%	50%	13%	22%	13%
-	Other/DK	51%	0%	43%	53%	54%
-	**Total**	**126**	**5**	**43**	**29**	**49**
Resumption/increase in	$500k+	22%	20%	28%	17%	20%
sales after removal of	$100k to $500k	17%	20%	14%	28%	14%
barrier to market access	$100k or less	19%	40%	21%	14%	18%
-	Other/DK	41%	20%	37%	41%	47%
-	**Total**	**2332**	**226**	**355**	**843**	**705**