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2019 Trade Commissioner Service Client Satisfaction Research

Executive Summary

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

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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

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

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