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# 2021 Trade Commissioner Service Comprehensive Client Interviews

## *Final Report*

**Prepared for Global Affairs Canada**

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Global Affairs  
Canada  
Affaires mondiales  
Canada

# 2021 Trade Commissioner Service Comprehensive Client Interviews

## Revised Report

**Prepared for Global Affairs Canada**

**Supplier name:** EKOS RESEARCH ASSOCIATES INC.

**Date:** February 2, 2022

This public opinion research report presents the results of an online survey conducted by EKOS Research Associates Inc. on behalf of Global Affairs Canada. The research study was conducted with 40 representatives of Canadian organizations using the services of the Trade Commissioner Service, interviewed between November 11 and December 17, 2021.

Cette publication est aussi disponible en français sous le titre : Entretiens approfondis avec les clients du Service des délégués commerciaux 2021.

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# I. SUMMARY

## A. BACKGROUND AND OBJECTIVES

Global Affairs Canada promotes Canada's interests and values through policy development, diplomacy, advocacy, and effective engagement. Global Affairs Canada's Trade Commissioner Service (TCS) helps companies sell their products and services outside Canada by connecting them with its funding and support programs, international opportunities and its network of trade commissioners in more than 160 cities worldwide.

In addition to its regular feedback research that tracks post-by-post performance and client satisfaction, the TCS undertakes periodic in-depth client research. The last TCS comprehensive client research took place in 2019 and involved a qualitative research component where a limited number of clients were targeted for key informant interviews. Based on the valuable insights from these interviews, a second round of 40 key informant consultations was deemed valuable.

The interviews help to identify the extent to which TCS effectively supports Canadian firms seeking to diversify their exports and improves efforts by trade commissioners to better facilitate economic outcomes for Canadian companies. The data allows the department to understand the evolving needs of clients and to improve services provided by TCS. Canadian businesses depend on the TCS to provide expert advice and support as it relates to exploring and growing opportunities in foreign markets, improving access to those markets, attracting foreign direct investment and links to innovation.

Specific objectives include:

- understanding the evolving needs of TCS clients and improving the services provided by TCS
- identifying opportunities for improvement in the delivery of international business development services to Canadian businesses across its entire network of trade offices
- seeking input into clients' experiences during the COVID-19 pandemic

## B. METHODOLOGY

The qualitative research involved 40 interviews with organizations who have received information or services from TCS. Half of the interview participants were randomly selected from among 1,138 clients who responded to a detailed client satisfaction survey conducted in 2019, and who agreed to participate in follow-up research. The remaining half were also randomly selected from a list of newer TCS clients who have accessed services in the past 2 years. A total of 140 previous TCS clients who had responded to the 2019 survey, along with 80 newer clients, were also contacted via email by Global Affairs Canada. The email introduced the research and asked those interested in participating to register online, indicating their interest and availability to take part in a 30- to 45-minute interview to describe their experiences with TCS. The link, set up and hosted by EKOS Research, also included a screening questionnaire with some basic questions about the nature and history of the export business, as well as the capacity in which they consulted with TCS. Respondents also had the opportunity to indicate the best day of the week and time of day for such an interview.

Interviews were conducted using a semi-structured interview guide. The guide, based on the 2019 interview, was revised to include questions about participants' experiences during the pandemic and how needs may or may not have changed during that time. The guide was then updated in French and finalized in conjunction with Global Affairs Canada.

An incentive of \$150 was offered for each interview, and only one interview was conducted per business sampled. Of the 280 TCS clients sent an invitation, 46 indicated an interest in participating. Of these, 2 were deemed to be ineligible, and 4 were not able to be reached or declined the interview on further contact. The 40 interviews were conducted between November 11 and December 17, 2021.

Each interview was conducted by telephone or Zoom and recorded to ensure accurate summary notes could be prepared for each discussion, with informed consent obtained in advance. Notes were subsequently developed from the recording of each interview. The analysis of the interview findings reviewed each participants' response for a given question, looking for major themes pertaining to each issue area, along with any nuances in opinion among the different types of participants, along with anonymized, illustrative quotes. It should be noted that the results are qualitative in nature. The analysis is based on multiple reviews of the notes by the senior researchers conducting the interviews. These results are not generalizable and cannot be used to estimate the percentage of TCS clients who had a similar experience or hold a similar view. Results from the follow-up interviews do, however, provide additional detail and insight into the findings of the 2019 online survey (not described in this

report) through illustrative experience and perspectives, as well as generally provide a detailed update on the experiences of some Canadian exporters over the course of the COVID-19 pandemic.

## **C. KEY FINDINGS**

### **The Role of TCS**

Participants identified the aspect of TCS information or services that they find to be the most helpful or valuable to them in realizing success internationally. Most participants most often identified the connections that TCS is able to make for them. Further, TCS serves as a representative of the Canadian government, lending credibility to Canadian businesses. TCS is also used as a source of local market intelligence, including cultural protocols and regulatory considerations, as well as a source for market data. Participants also said that TCS helps with planning and coordinating events or meetings. The TCS has been an asset during the COVID-19 pandemic by serving as a local presence when businesses were unable to travel to local markets.

### **Gaps and Areas for Improvement**

Several gaps or areas of improvement in providing information or services were identified by participants. While most were very positive about staff and their responsiveness, access to and responsiveness of staff was noted by some, including a perception of an inadequate number of staff to respond to needs. Some participants said that improving specific sector knowledge, specialized market data, access or advice to potential funding or investment sources, or more targeted connections would help Canadian businesses achieve their goals. Some participants mentioned that they were new clients or not fully aware of TCS's information or services to identify any gaps.

### **Timeliness**

Most participants access TCS information or services to support planned business development. This planning is longer-term, or used to support a trip to a market to explore opportunities or attend events. Most participants, particularly those with an established relationship with TCS staff, said that they would go to TCS in the event of a time-sensitive or urgent matter.

## **Perceptions of TCS Staff**

TCS staff are viewed by participants as knowledgeable and helpful. The understanding of the local market by TCS staff, including culture, awareness of local issues and events, and connections to business contacts are considered a great asset to participants. Although local knowledge is the primary benefit of TCS staff, they often work to understand a specific sector and needs of the business. The more directed and beneficial the connections made by TCS staff, along a perceived understanding of the market or business, the more satisfied participants are with their experience with TCS overall. In some cases, it was deemed difficult to reach TCS staff in new markets or without an introduction.

In most cases, TCS staff were described as responsive, particularly when a relationship has been established between staff and the participant. Some said that it may take weeks for staff to respond or that there can be a delay in staff implementing action items from meetings. Locally hired staff are generally considered to have a deep knowledge of the market and have more extensive contact networks. The Trade Commissioners posted from Canada, however, may provide a better understanding on the benefits of the business activity to Canada.

## **How TCS is Described Overall**

Many participants describe TCS as a resource to help reach international markets. TCS provides support as a facilitator to garner local market knowledge and connect Canadian businesses to the market. The TCS can help advocate for Canadian businesses and make valuable connections in the local market. The support or connections from the TCS allowed for enhanced credibility internationally, opening doors more effectively than businesses could have achieved on their own.

## **Comparable Programs and Uniqueness of TCS**

Other professionals or public organizations that provide support for exporting to global markets include chambers of commerce in specific markets, provincial agencies and federal agencies such as Export Development Canada (EDC). Some participants are either aware of or have used private companies, primarily for information such as market reports, often in a specialized sector. Although some participants mentioned private consultants as a source for market reports, few have used this service, mostly due to the cost.

In spite of some participants describing other sources for some aspects of the same information or service, the TCS was identified as unique because of the worldwide reach of Trade

Commissioners. The global network of the TCS is often highlighted as an asset because of the TCS's ability to interact in a similar manner in various markets. The TCS provides local market expertise and a presence in most markets internationally, and participants viewed the service as complementary to other organizations.

## Challenges

Participants identified several main challenges anticipated in doing business internationally. Most often, the uncertainties related to the COVID-19 pandemic were mentioned, including understanding the ability to resume in-person meetings and the implications for Canadian businesses of any changes in local market conditions. Challenges with the global supply chain were mentioned by nearly all businesses with tangible products. Participants noted many other challenges such as labour availability, cyber security, obtaining study permits, and support from the federal government in trade agreements and promoting Canadian business. Participants continue to anticipate challenges in doing business internationally, including in areas where TCS provides support, such as understanding local markets and making connections.

## D. NOTE TO READERS

As per section 10.2.3 of Public Works and Government Services Canada's Qualitative Research Standards, "Qualitative research is designed to reveal a rich range of opinions and interpretations rather than to measure what percentage of the target population holds a given opinion. These results must not be used to estimate the numeric proportion or number of individuals in the population who hold a particular opinion because they are not statistically projectable."<sup>1</sup> In order to avoid portraying these results as generalizable to the population, terms such as "a few," "some" and "most" are used to broadly indicate views rather than using specific percentages. To ensure a common understanding of the terms used in the analysis, the following guidelines were used in analyzing and reporting on participant results:

- "A few participants" = at least two people but less than 25 per cent;
- "Some participants" = 25 to 49 per cent per cent;
- "Many participants" = 50 to 75 per cent per cent; and,
- "Most participants" = over 75 per cent per cent.

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<sup>1</sup> Public Services and Procurement Canada. [Standards for the Conduct of Government of Canada Public Opinion Research - Qualitative Research](#). Last updated: Spring 2019.



It should also be understood that the information provided by participants is subjective in nature and based on their own recollection, and perceptions of interactions and information provided between TCS staff and Canadian business representatives. Appendix A provides the screening questionnaire, and Appendix B provides the interview guide provides the interview guide.

## **E. POLITICAL NEUTRALITY CERTIFICATION**

I hereby certify as Senior Officer of EKOS Research Associates Inc. that the deliverables fully comply with the Government of Canada’s political neutrality requirements outlined in the Policy on Communications and Federal Identity and the Directive on the Management of Communications.

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 by:



Susan Galley (Vice President)

## II. DETAILED FINDINGS

### F. PROFILE OF PARTICIPATING ORGANIZATIONS

The range of organizations providing feedback on use of TCS information and services was varied, although more concentrated among small, private sector organizations, reflecting the broader TCS clientele.

- **Size** - 16 participants represent small organizations (fewer than 10 employees), 16 are with medium-sized organizations with between 10 and 99 employees), and 8 are large organizations with 100 or more employees<sup>2</sup>.
- **Type** – 29 of the 40 participants represent private sector organizations, while five are in the public sector and six are associations who interact with TCS on behalf of their members.
- **Industry** – There is a wide range of industries represented, including 9 in primary resources (agriculture, energy and water treatment, and mining), 10 in information technology (software, Internet services, virtual/learning platforms), 7 in education, 3 in health/medical services/equipment, 6 in consumer goods, 3 in arts, culture and recreation, and 2 in services (e.g., legal, financial).
- **History of contact** – 27 of the 40 participants have gone to TCS for assistance for an extended period of time. Most described frequent contact with the TCS over the years, although five said that they had not had significant contact. The remaining 13 participants have a newer history of contacting the TCS, within the last one to two years (i.e., during the pandemic).
- **Length of time exporting** - Four of the 40 do not or have only recently started to export products or services. Of the three in four who do, most export to the United States as well as other foreign markets.
- **Role in the organization** - Two in three of the representatives interviewed function at the executive level (Founder, President, CEO), while five classified themselves as middle managers involved in the development of sales and or market expansion.

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<sup>2</sup> Two participants did not identify size of the organization they represented.

## G. USE OF TCS SERVICES

Participants described what they perceived to be the role of TCS, their most common interactions, and the critical attributes of TCS. While the specific description of services and information provided varied considerably, by and large, they fell into a few broad themes.

### Making Connections

Participants were asked in the interview about the aspect of TCS information or services that they found to be the most helpful or valuable to them in realizing success internationally. Most participants talked about the connections that TCS is able to make for them. Through their local networks and trusted partnerships, many participants said they value TCS's ability to introduce them to relevant connections, whether they are looking for new clients, local partners or suppliers, or local government representatives for advice on local requirements. A few even spoke of introductions to programs or sources of funding. A connector or matchmaker were often terms used to describe this important function.

"Providing the network and making connections was the most important part. The contact was very tailored to us and the connection was the most important thing, as a potential investor." (Small, private)

"Being referred to people in foreign markets is very helpful. Trying to find information myself online [about the Chinese market] is very difficult because everything is in Chinese." (Small, private)

"I would rather have someone from the TCS or the embassy do a warm introduction first. (It) builds trust." (Small, private)

Often, participants described TCS providing connections between Canadian businesses who are selling products or services with those who are in the market to purchase them. In other cases, the connections were to local suppliers, manufacturers or distributors. In a few cases, these connections were also local partners and/or investors. Overall, respondents indicate that the TCS has the ability to open doors, often at very senior levels, which is very helpful in solving some issues.

"They identified some potential local partnership opportunities/clients that could be a fit." (Large, private)

"We have used TCS to make new connections in markets TCS [to make the introductions to the specific company/individual in the country]. Talking to [actual] decision makers makes it more efficient. It was time-consuming before to talk to lower-level people before TCS was able to introduce us to higher decision makers." (Small, private)

As a connector, some observed that TCS provides a Canadian government presence supporting and working on behalf of businesses. The presence of Government of Canada representatives, on the ground in foreign markets, was seen to augment an organization's visibility, add a seal of approval or prestige, and demonstrate support. This lends a strong degree of credibility to Canadian businesses and helps to open doors, in some cases at very senior levels, which businesses would not be able to do on their own. Canada has a strong global reputation, a few observed, and having the Government of Canada alongside businesses in their first introductions in local markets, at trade shows and at presentations added a certain prestige or cachet that was very helpful.

"They help you get your foot in the door. They give you credibility and Canada has an excellent reputation globally." (Small, private)

"Opening doors, for sure. A call from a Trade Commissioner is very powerful. In trying to meet with Ministers or Presidents of (...), it really helps to be alongside the Trade Commissioners." (Large, public)

"It's much easier, especially the first time around, if one were to meet at an event that is hosted by the TC. That provides a certain cachet to the event [this is something that people at senior levels will attend]. To some extent you want that seal of approval [on both sides]. We get into meaningful conversations more quickly." (Large, public)

"TCs are the official representative of the Canadian government in those foreign countries, [and] you want to have that seal of approval. Having the Canadian government with us gives it that official stamp of legitimacy." (Large, member-based)

"It gives us credibility that many don't realize it helps with—that we get credibility with local governments and potential partners because of the TCS. They have, and therefore give us, a huge presence and reputation in that particular market they are standing behind us." (Small, private)

"They provided a general understanding of the environment from a regulatory standpoint." (Large, private)

Some participants reiterated that having TCS make introductions to or recommendations about local organizations or individuals means that Canadian businesses can have trust in the organizations; that they have been vetted by TCS, which is a valuable service they rely on. Similarly, participants said they recognize and appreciate the unbiased view of TCS; that they do not have any "skin in the game" locally, and are working on behalf of Canadians in these countries. A few participants said that it is "nice to know they are there (on the ground), if you need them" to provide assistance, information and honest opinions. Having suggestions and recommendations about potential buyers, suppliers and so on from TCS staff who know the region, are familiar with who's who, have extensive networks is very important, according to some participants. Knowing that you have the support of those who are in a position to do some advance reconnaissance within the local market is reassuring.

“Getting things vetted through them is huge, and this is something that I find people underestimate the value of this.” (Medium, private)

“They recommend industrial representatives who have a track record and can be trusted.” (Small, private)

“We have trust in them and their knowledge/advice so we trust who they connect us with”. (Small, private)

“Important to have some level of trust that you weren’t being robbed in dealing with the partners.” (Small, private)

## Providing Local Intelligence

Many participants said that the TCS helps provide services and information to form a deeper understanding of the local market. For some, the information they are looking for is about the local landscape (e.g., political, economy, state of infrastructure), an understanding of how things get done in a particular market (e.g., barriers or concerns, process to follow), or market data (e.g., demand, competitive landscape). Others are looking for specific information related to regulation, taxation and logistics in areas such as travel, shipping/import, labour supply, etc.

“They help us get a feel for the country and the logistics (considerations/issues).” (Small, private)

“TCS helps us in understanding the labour market a little bit there, through access to labour-market reports that they have, understanding all of the different rules and regulations to be able to be established there, and what that looks like for us to even hire people in those countries.” (Medium, private)

## Planning Events and Logistics of Visits

Some participants said they rely on TCS conferences, missions and other events for visibility and the opportunity to make their own connections or be introduced by TCS at such events. A few participants described the assistance of TCS staff in planning and coordinating events and meetings, as well as in following up with local organizations on their behalf, or doing advance research, or having preliminary conversations locally. Assistance with logistics planning, and advice about scheduling and how to maximize time and exposure, were also noted by a few. Collectively, these examples described TCS as not only a connector and information provider, but also a source of support or a facilitator on the ground.

“They have helped us with scheduling trips and coordinating meetings. They’ve been helpful on missions to maximize our time. TCS books meetings, coordinates the meeting with others in the market.” (Small, private)

“Sometimes they will work with local education institutions to plan education events such as open education fairs or working with private corporations with things like logistics, connection to local

school counsellors. Sometimes assisting with local visa processes or permits to be able to visit certain jurisdictions.” (Large, public)

“There was an event in Europe and the Trade Commissioners were involved in making connections and then they followed up with a list of companies that we could connect to.” (Small, private)

“Our first contact was attending a TCS virtual conference with Germany that had many features like matchmaking services, virtual booth with chat function, and follow-up metric on visits and list of contacts.” (Small, private)

“We did a presentation at a conference to potential businesses (buyers) in China about 15 months ago. TCS brought buyers and distributors along with suppliers together and we presented.” (Large, private)

## **Expertise/Consulting Services**

Some participants described assistance from TCS in helping them to scope out the market, plan how to frame or position products or services, and develop the most viable strategy. They have helped some start-ups consider what steps to tackle first, or what pitfalls to avoid. Some said that the TCS has lobbied on their behalf with other governments to solve problems and remove obstacles (e.g., regulatory constraints, shipping/import issues). One business described the assistance they receive from the TCS in researching local infrastructure to respond in an emergency, such as an accident (i.e. infrastructure capacity to respond to safety issue). A few others spoke of TCS assistance in raising the profile of Canadian business (i.e. the benefits of working with Canadian businesses), and on a few cross-sector issues such as ethical operating principles or the need for strong cyber security.

“I can pick their brains on what is happening in the market and get advice on the best approach of our institution.” (Large, public)

“In Vietnam, we had difficulties with obtaining regulatory approval of one of our devices and they were able to put us in touch with the right people to resolve the problem.” (Small, private)

“Many years ago, I used to also travel, and TCS would set up meetings in the Canadian embassy office.” (Large, private)

“When we plan large international events or conferences, we know TCS is there for us. They facilitate meetings with potential clients and open up opportunities for us.” (Large, public)

## Industry-Specific Information

Respondents indicated that TCS provides market information related to supply and demand, degree and nature of competition, and so on. A number of participants said they were able to obtain detailed reports on the nature of the market to help guide them in planning next steps and future expansion strategy.

“They’ve sent us labour-market reports or key pieces and a listing of newsletters or other groups we should look at, and connect us with newsletters that they put out (i.e. information on international students, when they are doing events).”

“Sometimes, different TCs will prepare labour-market or [sector] market briefs.” (Large, public)

“TCS is also able to pass along information in terms of what people in that market are feeling about a Canadian [sector].” (Medium, member-based)

Perhaps even more importantly, according to some participants, TCS provides information on the broader landscape in the market, including key operating protocols, regulatory conditions and hurdles, laws, and so on.

“They give me a good sense of the protocol involved in approaching the armed forces, coast guard, or police services in a country. And it is all very different [in each country].” (Small, private)

“There are many barriers to getting into the Chinese market, and TCS can assist me with things like whether so-and-so is legal or not. China is complicated. Without TCS there to assist me, I wouldn’t be able to deal with them. I have confidence in them, and for me that makes a huge difference.” (Small, private)

“It’s understanding the target market, whether that be the country, the laws, the regulatory hurdles, or the connections, which is nice.” (Small, private)

## H. GAPS OR AREAS FOR IMPROVEMENT IN INFORMATION OR SERVICE

Participants were asked about areas where they feel TCS could be doing a better job in providing information or service, as well as areas where they feel TCS could be adding or augmenting services.

A key area noted by some participants relates to staff shortages and/or responsiveness. Several said they have observed that staff resources are too thin to respond to the demand in some smaller offices or in some markets. Others generally suggested the need for more staff, particularly locally-hired staff to increase capacity to assist. In terms of responsiveness, a few described situations of not hearing back from staff for a number of days or weeks, and, in a few cases, not at all.

“Sometimes they are very busy. They are short- staffed.” (Small, private)

“If they can have more staff, Canadian companies would be well served.” (Small, private)

“There are some markets where TCs are bombarded and a small institution like ours, that is research-focused, doesn’t get the attention.” (Large, member-based)

“I did notice that during COVID it was harder to contact them... [and] it’s taken longer to get in contact with them.” (Medium, membership-based)

Some participants spoke of staff’s lack of research or detailed understanding of sector or business model—a situation possibly related to under-resourcing—or that contacts are not as qualified or specific as they would like. There is a need for greater investment by TCS staff in getting to know individual businesses and their sector to better understand business goals so they can suggest only the most relevant matches and provide more relevant market intelligence. A few participants suggested the involvement of local consultants or custom brokers, for example, in order for TCS to obtain a more detailed picture and provide the best connections. These participants said that a generic list of contacts is not useful; quality is better than quantity.

“The service works well when there is sufficient due diligence from the TC to ensure there is a good potential match and when there are some funding possibilities to make the match/connection viable/attractive for both parties. Sometimes it’s just a random pairing, though, and that is generally not very helpful.” (Large, public)

“TC should know more about the burgeoning field of digital medicine, since it is exploding. They need to develop their own industry-specific/sector expertise in such a huge area, even if it means hiring consultants rather than staff, which is expected.” (Medium, private)



“I would prefer conferences [that] were more targeted to a section of the food industry, such as health and wellness with specific buyers and suppliers who are interested in that specific section that can make a lot of difference. When it’s everyone (all areas of the food industry) you get kind of lost in the mosaic.” (Large, private)

Similarly, a few participants said that market data and information lack sufficient detail or industry context to be very useful. They emphasized their need for more specific or contextualized market information that is actionable for specific types of products/business. If necessary, a few suggested connections to local expertise (market research subscription/consultant); one in particular saying it would be reasonable to expect that there would be a cost associated with this.

“I didn’t get the impression at the time that he really understood our business, whereas I found the [other] model of working with a market consultant on the ground—bringing the expertise into the equation and accessing market database—was good. As a result, we received a pretty extensive market scan [from the other model]. By comparison, the TCS information/service was good but a bit too general.”

“Where they could beef it up would be more in market research intelligence in certain countries. We can always go and buy it, but it’s expensive for a small company. So, for example, what is the [...] market like in China? Who are the big players and what are their sales numbers?” (Large, private)

A few participants indicated an interest in receiving more information, insight and advice about potential funding sources. A few also referred to a noticeable lack of, or diminishing access to funding, particularly during the pandemic. These participants noted, for example, that CanExport’s eligibility criteria were too broad, or that the agency had not provided feedback on why an application was denied. Several also talked about the lack of funding or investment opportunities offered by the Canadian government for exporting, relative to other countries.

“CanExport opened up the criteria so that everyone can qualify for it. [...] it needs to go back to companies that put their own money down to go to the target market, do business, and go home.” (Small, private)

“I completed a request for financial help from CanExport but found it extremely complicated. I would have liked help in understanding what was important, how to optimize my chances of getting the help, and when not successful, feedback on the weaknesses of the request.” (Small, private)

“We are having to invest and expand very quickly and we need resources to be able to innovate fast. Being able to go to TCS for funding or to get assistance/advice on where to go for funding would be key.” (Small, private)

“With COVID it seemed like there was an extra hurdle and [CanExport] became very difficult to apply for. Greater availability and eligibility of grants would be helpful.” (Large, Private)

“TCS needs to also attract investment to Canadian companies. Israel has created more unicorn companies than even the USA, because they have a program where any international investor who invests in a start-up, the government will match that.” (Small, private)

Also possibly related to under resourcing, a few participants suggested that it would be beneficial to them to have TCS staff be more proactive in getting to know them and their business objectives, to be able to make more tailored connections and recommendations. Two participants also said that it would be helpful if TCS staff showed a greater willingness to provide assistance in areas such as interpretation of information, to help the client better understand or adapt generic information to their own situation or requirements. Further, a few said they would like more formalized follow up with TCS after services or information were provided.

“I would say it was just an affirmation of findings I already had prior to reaching out to them. The links they sent me were links I already had. It could have been more helpful.” (Small, member-based)

“When I have gone to visit a TC office it hasn’t really done anything for me, so I don’t. They aren’t very dynamic (i.e. proactive).” (Small, private)

“... [J]ust more clarity or more willingness to help do the digging on these issues and not just transferring me to similar information that anyone could find. Helping to interpret some of the vague responses (more specifics and clarification, instead of me guessing). A contact in the foreign government is also something that they could have supported. The service needed to be more hands-on/interactive, with more communications to understand/investigate what was needed.” (Small, membership-based)

Some participants said they could not identify gaps or where improvements are needed, since they are not fully aware of the array of information and services TCS offers, or how Canadian businesses can use them. While this was more concentrated among new clients, it was also noted by several with a history of using TCS services. A few specifically said that they have started to find out more about service offerings during the pandemic and look forward to more opportunities to connect with TCS staff on a range of issues.

“I have learned more about them in the last 2 years than I knew before the pandemic (about their services and how they can assist us).” (Small, private)

“(Having) things like webinars (about TCS services) might be a great idea because they are more accessible now. We can have more questions going into things and learn how to make the most of situations based on their (TCS) experience.” (Medium, private)

“I don’t know what else they offer. The more you understand, the more you can use it for what you need.” (Small, private)

Other areas mentioned by one or two participants included:

- TCS assistance can be lacking in offices/markets where the education portfolio is not a priority. Two participants in the education sector also observed some stronger relationships between TCS and a few specific institutions.

“There are different resources allocated in terms of time and outreach. In some markets, there have been instances where it wasn’t an equitable process, such as preferential relationships like we say in Kenya.” (Large, public)

- Some jurisdictional or coordination issues between TC offices in different countries. These related to a lack of communication or coordination across TC offices, and in one case, barriers to proceeding with one office as a result of previous communications with a TC office in another country.

“I have to contact TCs separately, one by one. It is not [hard], but would be better if there was some sort of database. An internal review [to collaborate, perhaps by region such as Asia].” (Small, private)

“We didn’t know that starting in [one TC office] would result in needing to keep these relationships and conversations separate (i.e. conversations around... need to only happen with the.... people, and we can’t talk about any other state). It’s been challenging just navigating it.” (Medium, private)

Stemming from these discussions, a few more prominently suggested additions or improvements, include:

- More opportunities to learn about the types of information and services TCS provides, through a basic primer, workshop or webinar, and how best to take advantage of their assistance (e.g. at what stage, with what planning documents already in place)
- Related to this, several participants who were not very familiar with TCS services)
  - one participant said that it would be helpful to hear some of the stories of other organizations assisted by TCS (e.g. nature of the problem, type of assistance provided and outcome)
  - these types of stories and statistics could help provide hope for future success, but also be helpful information to add to an application for funding to demonstrate support
- more opportunities for conferences, seminars, round tables within specialized groups (i.e. local suppliers in specific sectors and markets, specialized sub-groups of broader industries)
- round-table discussions with relevant Canadian businesses for the purposes of sharing information about market changes during the pandemic and expectations for a post-COVID world, lessons learned and best practices (e.g. virtual vs. in-person approaches)
- more proactive efforts on the part of TCS to understand more deeply the nature of the sector or business and their objectives, providing clients with specifically targeted market

- data or local contacts that are honed to their needs; potential involvement of specialized, local consultants at subsidized rates
- greater innovation in how clients are assisted, brought together and connected with others, including more pilot projects to test best approaches
  - greater coordination of TCS offices across different regions of the world (information sharing, common approaches/protocols, consistency of methods of communications)
  - greater focus on access to funding and assistance/advice related to accessing funding
  - more staff resources and sector expertise, particularly in a few key areas such as education

## I. USE OF TCS IN URGENT SITUATIONS - VIEWS ON RESPONSIVENESS

When asked about the need for TCS services in urgent situations, most participants said that they did not use their services in this way. Many said that TCS information or services informed planning decisions and strategy that were more long-term than immediate and urgent.

“[We] Haven’t really used TCS for immediate needs. It has been more longer-term, strategic relationship with TCS.” (Small, private)

“No, it’s not the kind of service we go to them for. It takes a very long time to figure out where you can find things and who is trustworthy and who is reliable.” (Medium, private)

Some said they rely on TCS for some longer-term and some more time-sensitive or urgent matters. Almost invariably they said they feel they can count on TCS to respond quickly in urgent matters, especially if they have an already established relationship with TCS staff in a market.

“There were times we needed help ASAP. We were going into a new country and our buyer backed out at the last minute. So, we went to a trade commissioner, and they were responsive when I explained to them how urgent it was.” (Small, private)

“It’s tactical in that we are selling our products now. But it’s strategic in that we are identifying ourselves, we want to build a relationship. I wouldn’t hesitate [to contact TCS for immediate problems].” (Small, private)

“A couple of us have had issues while travelling abroad and we’ve tapped into TC for support (e.g. help with intel on COVID testing in-country), and that was immediate and very helpful.” (Medium, membership-based)

Although some said they have not used TCS services in this way to date, they indicated that staff are typically very responsive and prompt.

“TCS are fast; faster than I was ready for.” (Small, private)

“We use TCS for future opportunities [of where they would want to expand to]. All Asian branches are very quick to respond, and I would go to them right away [for urgent need].” (Small, private)

“Mostly for the future collaboration, something we are trying to build on. They are very quick.” (Large, public)

## J. IMPRESSIONS OF STAFF AND TCS OVERALL

### TCS Staff

The TCS staff were described by most participants as being very knowledgeable and willing to help. Many spoke of TCS staff as being the eyes and ears on the ground or embedded in the local market. Most participants view TCS staff as being well-versed in their local market, with knowledge of local language and culture, along with awareness of events taking place that may conflict with or augment the client's event or visit. Of greatest importance, to most participants, is TCS staff's ability to identify key contacts in local markets that can support business development.

"It's a great service! They really know what they are doing. It's good to have access to a Canadian presence in foreign export activities." (Large, private)

"We only think from a Canadian perspective, but they know information on culture and how to work with an institution and what challenges we may see." (Large, public)

"We can go into a country and meet with the TC and get a better understanding of country capacity and [partner/buy] company capacity in an emergency. It's also nice to know there are options, including TC connection in an emergency. That's huge!" (Small, private)

Many participants further distinguished that TCS staff are knowledgeable about their market and work to build knowledge in a sector. TCS staff may already have sector knowledge through experience with a specialty portfolio, such as education or agriculture, or build this knowledge through meetings with the client. Many of these participants felt that TCS staff were clearly able to understand the specific interests of their organization and identify areas of opportunity or advice, or suggested contacts within the market. These participants said that TCS staff were proactive and took the time to get to know their business and international objectives, which resulted in the most relevant matches and market information.

"Very knowledgeable. Even though they are not in this industry, they pick up the knowledge very quickly, I am so surprised." (Small, private)

"What I really like is that they are trying to find out who we are and how to send us information or contacts in the right direction with potential opportunities." (Small, private)

"The TCs I work with are very knowledgeable and many of them have been in this area for quite some time and know the file very well and what we are looking for from a Canadian standpoint." (Large, public)

Conversely, a few said that they did not feel staff had taken the time to identify the most relevant contacts for their business, resulting in a less efficient process of meeting many different contacts to find potential international partners. Those with less directed contacts provided by TCS tended to be less satisfied with their overall TCS experience with TCS overall.

“They need to have some knowledge about basic things like area of the industry and duty rates and so on [to understand the basic model in making informed connections].” (Small, private)

“They were prompt but not very responsive in terms of understanding or trying to understand needs.” (Small, member-based)

Many clients said that their satisfaction with TCS staff, and the ability of staff to assist them, increased after a relationship was built between the Trade Commissioner and the client. In some cases, participants indicated that they were able to get more thoughtful and responsive assistance from TCS staff with whom they already had a working relationship.

“When you have a relationship, they are much better, and really work for us. For a few Trade Commissioners, I go direct to them and ask questions and they give me an answer right away, and they are the ones I have a relationship with.” (Small, private)

“Once you have a relationship, and you show how serious you are, they are willing to go the extra mile.” (Small, private)

A few participants indicated that it was difficult to reach TCS staff in new markets for them or when participants perceived their organization was too small to attract the attention of a Trade Commissioner. Particularly in markets that are considered very busy, a few participants said that they needed an introduction to approach or garner the attention of a Trade Commissioner.

“The smaller the market, the more helpful and engaged they are. For example, in the USA, you need an introduction just to meet a Trade Commissioner.” (Small, private)

Alternatively, few participants, however, particularly with smaller start-up companies, said that they were impressed with the amount of attention their organization received from TCS staff.

“We are a small company and the specific TCS staff that we work with and meet with pretty regularly just to update them on what we’ve been doing [...] I’m grateful that we are on their radar or top of mind.” (Medium, private)

“I was surprised by the reach that my little company has been given by the TCS and how powerful that makes me feel, when Canada has my back.” (Small, private)

In terms of responsiveness, many participants said that TCS staff are typically very quick to respond to requests; an email may receive a response within a few days, even considering the time change.

“I tried to find contacts and information myself, but I was unsuccessful. When I contacted TCS, they gave me everything I needed within two days.” (Small, private)

“They just get things done! I can’t think of many occasions when the TC hasn’t delivered what they said they would.” (Large, member-based)

“My experience is that they are quick, efficient in terms of getting the information we want. Very responsive.” (Large, public)

Some others said that responses may take a few weeks to respond, with only an automatically generated acknowledgement of the email received in the meantime. A few participants said there can be a delay in receiving information after a meeting with TCS staff.

“We would have a great meeting, there were great action items, but then it would be 4 to 5 weeks before we heard back.” (Small, private)

Many said that TCS staff inspired confidence and clients trust the information they provide and their willingness to help.

“[...] was very helpful and I felt like I was speaking with another member of my own team. There was an immediate trust in what information she was providing me with.” (Medium, private)

“They always seem to have the information I need. I’ve never been left with unanswered questions, that I don’t at least have a satisfactory answer for. It’s quite hard to do what we do without dealing with the Trade Commissioners.” (Large, private)

“We definitely have felt extremely supported in all of our conversations and it gives us that confidence that as things come up, we can ask them and know we will get honest and clear answers and guidance from them.” (Small, private)

Some clients identified a distinction between Canadian Trade Commissioners working in a market and local staff hired in the market. Many noted, in particular, the deep knowledge and responsiveness of locally hired staff, who are typically very familiar with the local market conditions, with extensive contact networks. The Canadian Trade Commissioners, however, may move from market to market and provide better awareness on the benefits of the business activity to Canada.

“Trade Commissioners often change, move from one country to another, and sometimes they need change. As long as you have a continuity of local staff, that is a better approach. Canadian Trade Commissioners have to rely on their local staff. More effective to use local staffs as they understand



the language and the mindset of the people and are able to guide. Canadian Trade Commissioners have skills of how it benefits Canada.” (Small, private)

One client identified a barrier due to local staff using speciality platforms (WeChat, LINE, WhatsApp) to communicate TCS events or information, and only in the local language.

### How TCS is Described Overall

Participants were asked to describe the TCS using a word or phrase. Many participants said that the TCS is a resource, providing “market connectivity” for Canadian businesses looking to reach international markets. TCS was described as a “matchmaker,” “facilitator” or partner in support of businesses that “provide interface” when entering a market.

“They provide interface with international export/import opportunities with regards to business development, fundraising and business opportunities abroad.” (Small, private)

“(They are)” F] facilitators. A resource. A contact. A source for researching potential customers.” (Large, private)

The TCS provides businesses with access to enter markets; it has a global reach not replicable by any other entity. The presence of TCS in most markets globally serves as the “local eyes and ears for Canadian exporters.”

“You feel support by the TCS. If you would go into a market and just try to figure it out, you would waste a lot of time. They shorten the road to success.” (Medium, private)

“A critical on-the-ground resource for Canadian companies that are exporting or considering exporting their products or services overseas, [...] because they are there and there is no substitute for local knowledge.” (Medium, private)

“They are well imbedded in the local scene, not just the city there are in, but the region or even the entire country.” (Large, public)

According to these participants, TCS support is a “very necessary tool” when reaching out to new markets and means that Canadian businesses do not have to “go it alone.”

“The TCS is a good partner for Canadian small companies who want to venture out overseas.” (Large, private)

“They support us in reaching our goals. Also, by telling us if something is not a good idea.” (Small, private)

“Another arrow in your quiver. You don’t have to go it alone.” (Small, private)

“It’s nice to know that they work on behalf of Canadian companies and they are supporting you in those efforts. They want to see you succeed.” (Large, private)

A few participants described TCS as being “helpful” or “knowledgeable” regarding a local market. Canadian businesses can obtain information on market conditions, culture and, most appropriately, connections when seeking to enter a market. These participants said that TCS can help advocate for Canadian businesses and make valuable connections in the local market.

“Knowledgeable. They always seem to be able to answer questions and get the information we need. They have never led me astray with the information.” (Medium, member-based)

“It makes a huge difference that [TCS] is there on the ground in foreign country offices. They have local staff and understanding of the local culture, language and regulatory environment. That is of amazing value to us. When we are preparing to enter or re-enter a market, we always talk with them so that they can brief us on the market.” (Medium, member-based)

“They are an advocate for Canadian businesses. They have knowledge of doing business in foreign countries (what is unique about that country) that is helpful.” (Large, private)

A few described the TCS as a government service or representative in a foreign market. These participants felt that support or connections from the TCS allowed for enhanced credibility internationally, opening doors more effectively than businesses could have achieved on their own.

“It definitely feels like a government resource. It feels very official, professional. The interaction feels government official.” (Small, private)

“We lean on the TCS for credibility because the TCS by extension has credibility being a Canadian federal government organization.” (Medium, private)

Two participants implied a “governmental” image of the TCS in negative manner, one that is bureaucratic or needs to have more modernized processes.

“Governmental. For better or worse. They have a significant amount of resources, well- funded. I imagine there are some very helpful people. But, it seems like such a large and bureaucratic organization, that I am daunted by the prospect of working with them. I feel that I would be sent from one department to the next.” (Small, private, new client)

## K. OTHER ORGANIZATIONS AND UNIQUENESS OF TCS

### Comparable Information and Services

Many participants identified other organizations or professionals who offer information or services comparable to what the TCS offers. Some said that they have used information or services from other organizations to augment support from the TCS. This includes the chambers of commerce in specific markets. Provincial support was also mentioned, such as the Ontario Ministry of Agriculture, Food and Rural Affairs or the BC Trade commission, as were trade shows organized by provincial governments. Federally, participants mentioned Export Development Canada as an organization providing support for exporting to global markets.

Some participants said that they are either aware of or have used private companies, primarily for information such as market reports, often in a specialized sector (technology, energy, medical etc.). Although some mentioned private consultants as a source for market reports, few said they used this service, with some pointing to the perceived high cost of acquiring the information.

A few mentioned other services that may be comparable, such as brokerages to connect with other companies, particularly to export agricultural commodities. Private services that organize delegations to markets and private firms specializing in immigration, accounting or legal support in foreign markets were also identified. Two start-up companies mentioned access to accelerators that can help businesses network in other markets, with an emphasis on identifying investors.

“We do work with EDC, and there is some overlap, but it’s a different animal. We do like working with them as well because there are different ways to look at markets and develop opportunities.”  
(Medium, private)

“On the research side, [named private firms] are in the business of providing market data but it doesn’t make sense when you only need access to a small specific piece of information. It’s about \$10,000 for a report, that maybe TCS has.” (Large, private)

“I’m sure there must be organizations who will help for a cost, but I haven’t gone there.” (Small, private)

## Uniqueness of TCS

Some participants said that the TCS was unique because of the worldwide reach of Trade Commissioners; while private firms may only have knowledge or connections to certain markets. The global network of the TCS is often highlighted by participants conducting business in multiple international markets as an asset because of the ability to interact in a similar manner in various markets. In all, the TCS provides local expertise in a market, and a presence in most markets internationally.

“With TCS I feel like I have offices in 140 countries.” (Small, private)

“The level of intelligence and the networking. I believe a private company might be good in a specific geographical area, but the Trade Commission can operate anywhere in the world with expertise.” (Small, private)

“I have this image of TCS being troops on the ground, but EDC are the generals [remotely]. Trade Commissioners get down and dirty to understand the market and provide help. You would perhaps have to hire a local consultant to guide you if you wanted something similar.” (Medium, private)

Some mentioned that any other organizations providing information or service in support of international business complement work done by TCS.

“There are other complementary services [political risk experts, etc.], but what the Trade Commissioners bring is unique and special.” (Medium, association-member- based)

Some participants reiterated that the information and services provided by TCS are free. This contrasts with private firms offering similar information and services, and perhaps only in a specific market or sector, for a fee.

“TCS is free, and that is the main reason why they are easy to work with.” (small, private)

Many participants mentioned that, as a federal government entity, the TCS is a unique resource for Canadian organizations operating internationally. Connections garnered through the TCS offers perceived credibility and “opens doors” when brokered by a representative of the Government of Canada.

“Being a government organization, they carry a lot of credibility. They have networks, even within governments, like in the US, and they open doors. One of the state departments of health, we were able to arrange a meeting and that would likely not have been possible without TCS.” (Small, private)

“Putting you in touch with government officials if you needed an introduction. They would probably have some good connections there.” (Small, private)

“Credibility. It’s a government entity. When you are connected by a government entity you have a lot of credibility.” (Small, private)

Some participants felt that they can trust the information provided by the TCS because they are not being paid for the service or have no vested interest in the information or service offered. In particular, connections made by TCS have been vetted and are considered “neutral” contacts with no financial or other benefits to the TCS for recommending the connection.

“Again, I trust the TCS because they are there on the ground in the country. And they are there for us, looking out for us.” (Small, private)

“There are institutions that do their own research, but to us, we would rely on Trade Commissioners more because I trust their information and the quality of their market research.” (Large, public)

“We have trust in them: they are a made-in-Canada solution, which I believe in.” (Small, private)

A few participants said that the TCS is unique because of the CanExport funding associated with TCS. Likewise, a few participants said that the TCS has helped them understand what funding may be available and directed or supported their application for the funding.

“There is a government grant where they will pay a portion of your travel costs.” (Medium, private)

“They have their finger on the pulse of a lot of programs that come out. They can help us get up and running with new programs.” (Small, private)

“They have access to government funding. The Canadian consulate, they set up a booth at a trade show and provide some funding and marketing initiative.” (Small, private)

## L. CHALLENGES AHEAD

Looking ahead, participants identified several main themes with respect to challenges they anticipated in doing business internationally. Most participants who traded in tangible products were concerned by supply-chain challenges, which have been exacerbated by the pandemic. Container shortages, backlogs at ports, lengthy delays and increased costs of shipping were cited by participants. While many participants perceived that supply-chain issues fall outside the scope of TCS, they stated that TCS can be advocates for exporters and help them find connections to transport products in a reliable, timely or economical manner.

“Our biggest challenge is logistics. The container shortage. Everything goes down to economics. How do we ship the product from Canada to Asia with a profit? How do we get it to the customers on time?” (Small, private)

“Logistics—the supply chain and costs are huge. I sent a container 3 months ago and it’s still not there. It took 40 days to get there, at anchor for another 20 and the 20 more in port waiting to offload.” (Small, private)

“Supply chain is the worst. A shipping container that used to cost \$3,000 now costs us \$18,000. There are a couple of manufacturing goods coming to us from Europe into [North America] and they are asking us to co-pack this for us because it’s too expensive to ship. There has been that much of an increase in price, so there are no margins.” (Large, private)

“There may be nothing TCS can do there, it’s just a global issue, but if TCS had the clout or even the connections to help you to know where to go to solve some of these issues it would be very helpful.” (Large, private)

Many participants mentioned that understanding COVID-19-related travel restrictions in markets was a challenge. Although many participants said they were able to conduct business development remotely and hold meetings through video conference, all indicated that they foresee resuming in-person travel to markets in order to build relationships and be directly exposed to the business landscape. The challenges anticipated include considerations related to the resumption of international travel, such as local contacts’ appetite and ability to conduct meetings in-person, the need to quarantine, and a general hesitancy to travel due to the possibility that restrictions may change when away and the resulting implications for returning to Canada within the planned timeline.

“Not being able to go into the country is a challenge. Zoom is fine, but not to establish a new relationship. Our industry is still old school, and we need to meet people. It is B2B.” (Small, private)

“Single biggest one right now until things are post-COVID, it’s getting somewhere and not being able to get home.” (Small, private)

Understanding the changing financial scenario, appetite for products, and inflation were mentioned as challenges by some participants. This is due in part to the changing economies resulting from restrictions and shutdowns related to the COVID-19 pandemic. A few participants have conducted less business internationally since the start of the pandemic or stated that they are not sure what the market conditions will be moving forward, or how much things have changed.

“During the pandemic, we were reduced to about 10% of what we used to do before in reaching out to markets. Many projects were put on hold. We are waiting, in perhaps 6 months, to have some clarity in how the marketplace will react.” (Medium, private)

“Inflation south of the border is scary right now. With our much weaker dollar, to compete in these markets is going to be tough.” (Small, private)

Respondents anticipated that TCS can help mitigate the challenge of resuming business in international markets. During the pandemic, when most companies were not able to get to the countries where they normally would have conducted business in-person, they were able to rely on the TCS to help them make connections virtually and to provide local intelligence on conditions on the ground—regarding COVID, travel restrictions and safety, as well as issues related to supply chain and how the local market is changing. Some described the way in which TCS pivoted to virtual conferences during the pandemic to keep meetings, events and connections flowing during a difficult time when businesses could not travel to meet with local contacts in-person. During the pandemic, most participants were happy to receive any available information from TCS on current conditions, risk and travel restrictions, changes in the market, and the state of post-pandemic markets in foreign countries.

“They assisted for my recent trip to Jamaica to help facilitate information about can I travel to Jamaica, what’s it like right now, COVID rules, can I travel for business at the moment.” (Small, private)

“During the pandemic we didn’t have feet on the ground in the jurisdiction. Having the TC on the ground for connections was definitely more useful [then].” (Small, private)

“They would connect us to the distributor or the contacts and we have virtual meetings. They also give us updates on COVID conditions (how are things going in the country, what was happening).” (Large, private)

“We couldn’t travel during the pandemic and the TCS pivoted quickly to provide the same value they always provided, but remotely. [Normally] we might have waited to do in-person since it’s harder to build new relationships remotely. But, I would say that where we have managed to do this most successfully was when the TCS helped to bring this together.” (Large, member-based)

“[During COVID], when we transitioned into virtual events, we worked with them and in a lot of cases they were the ones organizing and inviting us to attend/to speak with their local counterparts. If

anything, they have worked even harder since COVID, but they've always been very strong and very present when we were organizing virtual events even before COVID." (Large, member-based)

Ongoing business development challenges were identified by some participants. This includes continuing to identify new markets to export, understanding the legal and regulatory implications of the market, geopolitical issues, the culture and way of doing business, and marketing the products internationally. Participants maintained that this is an area that TCS has been able to provide information and services and would continue to look to TCS for support in international markets.

"[It's] important to understand how the culture and environment is different and how that plays a role in the business." (Large, private)

"Because we are not selling a product, our main challenge will be lead-generation and making sure we have a good market entry strategy. And afterwards, making sure we have total compliance with labour laws and immigration laws." (Small, private)

"I need information to make sure we are operating within the parameters of that country from a legal perspective and a taxation perspective." (Small, member-based, small)

"Geopolitical issues. We couldn't close a deal in China because of the geopolitical issues." (Small, private)

A myriad of other challenges were noted, such as understanding complicated regulatory compliance in some sectors or countries; obtaining and retaining labour; cyber security and protecting against hacking and ransom threats; understanding changes to trade agreements and implications on exports; and the cost of tariffs. A few participants said that the Canadian government's lack of support in promoting Canadian products and technology is a challenge. These participants felt that the federal government could be doing more to establish trade agreements and work to "sell Canada" as a provider of quality products.

"HR is super critical [upcoming challenge]. Larger companies open up in smaller markets and steal all the talent." (Small, private)

"The biggest challenge anyone has is that the Canadian government is not as proactive as they could be. [...] We have had some good Ministers, but they don't know how to sell Canada." (Medium, private)



A few participants from the education sector said that obtaining study permits for international students is a challenge, with lengthy delays in obtaining permits increasing each year. This results in students having to withdraw from a program or delay their arrival. The participants wondered whether better information could be provided in the student's offer letter or if the educational institution could offer any other support that the education institution can be doing to assist a student's study permit application. These participants feel that TCS can help establish connections and foster dialogue with other federal departments to mitigate this challenge.

"Study permits are a big hindrance for us right now. For the upcoming intake for us, we are expecting 200 students, and only 20% of them have received their study permits. The same time, three years ago, we would have seen about 75% would have received their study permits." (Large, public)

# III. CONCLUSIONS

## **Providing Qualified and Vetted Contacts is Key**

Across all interviews, participants most often stated that the most critical service they need from TCS is obtaining qualified contacts within the country and market of interest. In many cases, they were looking for potential buyers, but they also sought suppliers and partners. Some said that qualified contacts are most beneficial when they are specific and targeted, and the result of TCS understanding the client's business.

Participants said they rely on TCS to provide this information because trade commissioners are viewed as specialists in the country of interest, working on behalf of Canadian exporters. Many said they have found contacts suggested by TCS to be well matched with their own business interests, and vetted as reliable and trustworthy. They pointed to TCS's solid understanding of their business and objectives, its extensive networks, the credibility it lends to their clients in foreign markets, and its willingness to help open doors at all levels. Networking opportunities with potential contacts were enhanced through missions, conferences, meetings and assistance with initial or follow-up meetings.

## **Investing in Relationships**

Many participants who were most positive about the value of TCS assistance mentioned an ongoing relationship with TCS or an initial TCS investment to get to know clients. The result was that TCS had a good understanding of the business and how it could help and the client had a good understanding of how to use TCS assistance. Some participants, particularly newer clients, also said that they were not well informed about the types of information and services that TCS can provide. Investing time in getting to know an organization, maintaining and building on that relationship, and continued communication on what TCS can offer—all these elements can contribute to increasing client satisfaction with TCS.

## **Provision of Local Market Knowledge**

Many participants also look to the TCS to provide detailed information about how business is conducted in particular markets of interest, including current economic, social and political climate and conditions; and requirements, protocols and procedures.

As with qualified contacts, TCS is considered by many to be the best and most credible source for information because they are on the ground, with a deep working knowledge in many industries, all over the world. They are typically well-informed about the culture, economic, social and political landscape of foreign countries where they have a presence, but also have

deep knowledge across a wide range of industries. Some participants described their considerable confidence in TCS's understanding of their industry and ability to advise them. Some spoke of the value in helping them to expand into new markets or strengthen opportunities. A few felt that TCS's presence in a local market allowed for opportunities to lobby on their behalf.

Participants were less positive about TCS when they mentioned receiving market information that was not sufficiently specific to their own industry. As with qualified contacts and market information, TCS's resources and ability to provide attention to individual clients were described as potential barriers or limitations. A few also spoke of the potential to bring additional industry expertise into the equation where it might be insufficient within TCS, recognizing that, while there might be a cost implication for the client, it would also increase the value and actionability of the information, making it worthwhile.

### **Access to Funding**

A range of other client supports/services were described as critical for some. This includes the availability of funding from TCS, as well as advice on other sources of funding. Some emphasized the need for more funding opportunities, as well as a more efficient application process. Others said that staff resources need to be in place in order to be able to be on the look-out for funding opportunities.

### **Access to Physical Presence in Market during Pandemic and Pivot to Virtual**

Most participants described far-reaching changes and consequences brought about by the pandemic. Many were suddenly grounded and TCS was their only contact located in foreign markets of interest. Many described the value of TCS adjusting to connect them with buyers and suppliers through virtual meetings and conferences. Some said that TCS's pivot toward these virtual connections is what kept them moving forward in the area of foreign exports. For some, this was also an eye opener about what can be accomplished virtually. While they still see in-person as the most effective means of connecting in many areas, they may begin to integrate more virtual connections in the future.

Along with supply-chain disruptions and unpredictability, most participants anticipate a challenge in the uncertainties involved in resuming business in international markets. To many, their experience with TCS during the pandemic has further emphasized the importance of having eyes and ears on the ground and the value of having TCS there, working on behalf of exporters in helping to form connections and provide information on which to base decisions. Nowhere was this more important than among those relying on TCS information and advice for travel-related decisions. Many participants anticipate that they will rely on TCS in its position

“on the ground” to help Canadian exporters with a real-time understanding of market conditions and COVID-19 pandemic restrictions and implications. Further, some expressed a keen interest in TCS sharing information, such as what it has learned about using virtual connection methods and what a post-COVID world might look like.

Some said the pandemic also provided an opportunity for them to get to know TCS better (i.e. types of information and services they can provide) and for TCS to get to know them better (i.e. their business, their objectives, their information/service needs). This further highlighted the value of investments to ensure that TCS and their clients have a shared understanding of each other (i.e. types of services and information required to be useful, and the type provided by TCS).

# IV. APPENDICES

## M. SCREENING QUESTIONNAIRE

### WINTRO

Thank you for your interest in completing an interview.

The interview will be conducted by telephone and should take between 45 and 60 minutes to complete, for which there is an incentive of \$150.

Please provide the time and date most convenient for you to complete an interview.

### Q1A [1,5]

Date:

Select all that apply

Monday	1
Tuesday	2
Wednesday	3
Thursday	4
Friday	5

### Q1B [1,3]

Time:

Select all that apply

Morning	1
Afternoon	2
Evening (until 8pm EST)	3

### PQ2

Please provide your name, telephone number and email address below to allow us to reach you if you are selected to participate.

### Q2A

First name (Please specify) 1

### Q2B

Last name (Please specify) 1

**Q2**

E-mail address (Please specify) 1

**Q3**

Telephone (Please specify) 2

**QA2**

*<[completed previous survey]We would like to ask the following questions about your organization to update your survey responses from 2019.[ELSE]We would like to ask the following questions about your organization.> 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 statements best describes your organization?

Please choose one response

My organization may pursue foreign business opportunities within the next five years	1
My organization is actively planning to do business in foreign markets within the next 12 months	2
My organization has been doing business in foreign markets for less than a year	3
My organization has sporadically done business in foreign markets over the course of several years	4
My organization has regularly done business in foreign markets for more than a year	5
None of the above	98
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

**QD1**

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

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

**QE1**

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

**QG1**

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

**QG2**

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

Please specify[COL]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
Over \$ 1 million	7
Don't know/Not sure	99

**QG3**

Does your organization export goods and services...

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

**QJ1**

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



**QJ2**

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

**THNK**

Thank you for taking the time to update this information. If selected, someone from our research team will get back to you to confirm the date and time of the interview, which can be conducted through a Zoom video call or through a regular telephone call, based on your own personal preference. The interview will take between 45 and 60 minutes and you will be provided with a \$150 incentive for your time.

# N. INTERVIEW GUIDE

## 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/video recording of the interviews. This is for the purposes of making accurate notes for analysis. The recordings we take are destroyed when the project is complete.
- There are no right or wrong answers to what we will talk about today, we are looking for your experience and opinion.
- The interview should take between 30 and 45 minutes to complete.

## Section A: Opening

To start off....

- Can you briefly describe your business and your role within it?
- Can you describe the types 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.)
- Has your need for information or service from the TCS changed over the last 18 months?

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 do not meet your needs?
- Are there things that TCS should be offering, but doesn't?
- Are there new services that you have started to need over the last 18 months that you did not need before?

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, for future opportunities?

- 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?
- FOR BOTH:
  - Has this changed over the last 18 months?

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?
- Have they been able to understand and assist with your needs as well in the last 18 months?

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

- PROBES:
  - Mitigating the effects of changes due to COVID-19 pandemic/ getting back to pre-pandemic business levels / taking advantages of new opportunities due to pandemic
  - 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
- Labor 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 when expressing an interest in doing this interview 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 just a word or phrase, what would it be, and why?

Would you say that this has changed in the last 18 months? In what way and why?

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? Was this in the last 18 months?
- 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?
- Is there anything that the TCS has been able to provide in the last 18 months that you couldn't get anywhere else? Or, was there a service that you received elsewhere in the last 18 months that you would have liked the TCS to have offered?

Are there types of information or services that you feel should be added to better meet your current needs? What and why?

- Is this because of changes in the 18 months? If so, do you feel that these conditions or need for these types of services are permanent?

## **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?

Thanks very much.