



2021 Trade Commissioner Service Comprehensive Client Interviews

Summary

Prepared for Global Affairs Canada

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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 : Entretien 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."¹ 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.

¹ 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)