

HF5415.2  
.Y6

c. 2 aa

# **MARKET INTELLIGENCE NEEDS STUDY**

PREPARED BY

**YOUNG & WILTSHIRE**  
**MANAGEMENT CONSULTANTS**

FOR

**INDUSTRY, SCIENCE, & TECHNOLOGY CANADA**  
**SERVICES TO BUSINESS BRANCH**

March 1990

*Informatics/*  
*Information*  
SEP - 3 1990

INDUSTRY, SCIENCE, AND TECHNOLOGY CANADA  
SERVICES TO BUSINESS BRANCH

**STUDY OF COMPANY PRODUCT-SPECIFIC  
MARKET INTELLIGENCE NEEDS**

---

MARCH 1990

INDUSTRY, SCIENCE  
AND TECHNOLOGY CANADA  
**LIBRARY**  
*AMQD*  
MAY - 3 1990  
**BIBLIOTHÈQUE**  
INDUSTRIE, SCIENCES  
ET TECHNOLOGIE CANADA

## TABLE OF CONTENTS

	<u>Page</u>
1.0 INTRODUCTION	
1.1 Purpose of the Study	1
1.2 Profile of Industry, Science and Technology Canada	1
1.3 Services to Business	2
1.4 A Market Intelligence Service Study in the Context of ISTC	3
1.5 Structure of the Report	4
2.0 METHODOLOGY	
2.1 Overview	5
2.2 Sample Design and Sampling	5
2.3 Focus Groups	6
3.0 ANALYSIS OF FINDINGS	
3.1 Current Usage of Information	7
3.2 Sources of Information	13
3.3 Future Information Needs	19
4.0 CONCLUSIONS	21
ANNEX A -- Questionnaire	
ANNEX B -- List of Publications and Associations Cited as Sources of Information	

## 1.0 INTRODUCTION

### 1.1 Purpose of the Study

This Market Intelligence Service Study, conducted for the Department of Industry, Science and Technology, has the following main objectives:

- o To determine the needs of Canadian companies for product-specific trade data, market penetration data and market research information sources.
- o To identify and describe the existing sources of information that are used by the companies, as well as their ease of access and cost, and evaluate how well the needs of business are being met through these sources.
- o To analyze the information and sources used by and available to companies and identify gaps (and their contributing factors) between needs and availability/ accessibility/ utilization of product-specific information.

### 1.2 Profile of Industry, Science and Technology Canada

The Department of Industry, Science and Technology (ISTC) was created on August 4, 1987 to help Canada face a new era of international market competition driven by unprecedented scientific progress and technological change.

The department acts in full partnership with the private sector, the science community, other federal government departments, and other levels of government to:

- o promote international competitiveness and industrial excellence in Canada;
- o renew and expand Canada's scientific, technological, managerial and production base; and,

- o bring together in a concerted way the talents of Canadians to guarantee our place in the first rank of industrial and commercial nations in the twenty-first century.

In order to carry out its mandate, it is essential that the Department maintain a high level and quality of intelligence on global and domestic markets, on the forces that determine business competitiveness, and on industrial, scientific and technological developments.

To this end, a systematic, intelligence gathering and review process is essential. This intelligence is linked to ISTC's advocacy and policy-making function and to its programs and services to meet challenging circumstances.

The Department's policies are in the area of:

- o industry and technology;
- o entrepreneurship and small business; and,
- o science.

### 1.3 Services to Business

Services offered are aimed at facilitating good business performance, complementing business and science activities in areas where unique competence and capacity can be developed. Services build on a foundation of strategic intelligence and the expertise of the staff. In all cases, services are based on the needs of industry as identified through consultation.

More specifically, service activities, coordinated as necessary with other departments and agencies such as External Affairs and the National Research Council, include:

- o technology services supporting technology prospecting, diffusion, and application; R&D brokerage and networking; and the provision of information;
- o trade and market development services in Canada such as fairs and missions; trade promotion; business opportunity identification; import replacement; export counselling and matchmaking; and

- o selected services in investment prospecting; development of industrial benefits from government procurement; management and productivity improvement; and business information.

#### 1.4 A Market Intelligence Service Study in the Context of ISTC

Businesses need timely product-specific market intelligence on domestic, North American and international markets. This information can help them identify and evaluate potential manufacturing, investment and technology transfer activities. Businesses can also make less risky decisions and thereby improve their profitability and international competitiveness.

In Canada, the following sources and types of industry information are currently available:

- o from Statistics Canada and several private sector databases, some statistics in aggregated format and some at the industry-specific level;
- o from industry sector branches of ISTC, industry-specific data;
- o from External Affairs, aggregated data on geographic basis; and
- o from the Services to Business Branch (SBB), intelligence reports on product-specific Canadian import data (e.g. Import Analysis, Import Profile), and, to a lesser extent, export and U.S. import data.

The Branch is considering the expansion of its market intelligence on Canadian imports to include analyses of North American and other international markets, such as:

- o detailed import, production and export data for a given product for Canada and other countries;
- o information on trends, tariffs and non-tariff barriers; and,

- o information on importers and exporters.

The SBB would also direct clients to other selected sources of information on a given product. This information would be available to companies, ISTC officers and to other public or private industrial development organizations.

The Market Intelligence Service Study aims at determining the needs of manufacturing companies for product-specific market intelligence. It also provides an indication of how well businesses' needs are currently being met, what the gaps are, and what factors would improve availability, accessibility and use of required product-specific intelligence for corporate decision making. The study also serves to identify and evaluate existing public and private sector sources of product-specific trade data and market research information sources.

#### 1.5 Structure of the Report

This report is composed of three main sections. Section 2.0 outlines the methodology used in the conduct of this study. Section 3.0 is an interpretive analysis of the survey findings. Section 4.0 provides conclusions based on our analysis.

Sampling technique in good



## 2.0 METHODOLOGY

### 2.1 Overview

A very rigorous methodology was implemented in the course of this study. All activities were undertaken with the objective of providing the Services to Business Branch (SBB) with high quality data, as well as in-depth analysis.

The final draft of the structured survey instrument was pretested with 22 respondents in actual field conditions. The revised version was translated into French. The questionnaire, included as Annex A, and the survey methodology were reviewed and approved by Statistics Canada. The interviews were conducted between January 16, 1990 and February 14, 1990, from Monday to Friday between the hours of 8:00 a.m. and 6:00 p.m.

Completed interviews were analyzed using SPSS-PC. Rigorous data verification was made after the data-entry stage and only once it was felt that the data was clean did the consulting team proceed to a more thorough analysis. Univariate, bivariate and multivariate statistical techniques were used in the course of the study of the data. Detailed statistical tables can be found in Annex B.

### 2.2 Sample Design and Sampling

The population for this telephone survey study was defined as organizations :

- o located in Canada;
- o listed in the Dun & Bradstreet database;
- o with files which had been updated on the D & B system in the 12 months preceding the survey; and
- o whose primary area of business was manufacturing.

The sample was drawn using a stratified random sampling method. To avoid too much stratification (i.e. by size, sector and region), the sample was stratified only by sector, randomly selected within each of the 14 identified sectors, and then sorted by size and

<b>EXHIBIT 1</b> <b>PROPOSED QUOTA AND ACTUAL SAMPLE PER SUB-GROUP</b>
---

Sub-Group	Proposed Quota	Actual Sample
<b>BY SIZE OF FIRM :</b>		
1 to 99 employees	165	236
100 to 499 employees	170	199
500 and more employees	<u>165</u>	<u>65</u>
TOTAL :	500	500
<b>BY REGION :</b>		
Atlantic	100	81
Québec	100	96
Ontario	100	131
Prairies	100	103
British Columbia	<u>100</u>	<u>89</u>
TOTAL :	500	500
<b>BY SECTOR :</b>		
<b>SURFACE TRANSPORTATION AND MACHINERY</b>		
Automotive	40	48
Marine, Urban and Rail Machinery	40	52
Electrical and Energy Equipment	<u>45</u>	<u>50</u>
TOTAL :	125	150
<b>AEROSPACE, DEFENCE AND INDUSTRIAL BENEFITS</b>		
Aircraft Propulsion and Missiles	26	18
Defence Electronics and Space	1	1
Marine and Land Defence Systems	<u>1</u>	<u>0</u>
TOTAL :	28	19
<b>INFORMATION TECHNOLOGIES INDUSTRIES</b>		
	62	56
<b>RESOURCE PROCESSING INDUSTRIES</b>		
Forest Products	40	42
Metals and Minerals	40	50
Chemicals	40	41
Biotechnology and Health Care	<u>40</u>	<u>13</u>
TOTAL :	160	146
<b>SERVICES INDUSTRIES AND CONSUMER GOODS</b>		
Consumer Products	40	43
Food Products	45	41
Textiles, Clothing and Footwear	<u>40</u>	<u>45</u>
TOTAL :	125	129

region. Quotas were allocated to each group, as depicted in Exhibit 1.

In total 500 interviews were completed with representatives of Canadian manufacturing companies. A sample this size produces overall results which are accurate within plus or minus 4.4%, 19 times out of 20. This is well within acceptable statistical standards. A sample this size also helps minimize the number of empty cells per sub-group of interest to the Services to Business Branch. Exhibit 1, presented earlier, shows the actual number of respondents that were interviewed in each of the sub-groups. Proposed quotas were respected with a reasonable level of accuracy, taking into account the corporations found in the Dun & Bradstreet database. Efforts were made to reach the proposed quotas for each sub-group. However in some instances quotas could not be reached since the Dun & Bradstreet database computer listing simply did not contain a sufficient number of companies with the appropriate characteristics.

A summary of the results of the attempts made to contact companies is provided in Exhibit 2. A refusal rate of 6% is quite low for this type of study, thus giving more credibility to the survey results. That is, the non-response bias is very small. As well, the completion rate of 27% is within, if not above, industry standards.

Since quotas were set for the various sub-groups (i.e. size of firm, region and sector), the characteristics of the sample cannot be compared to those of the total population.

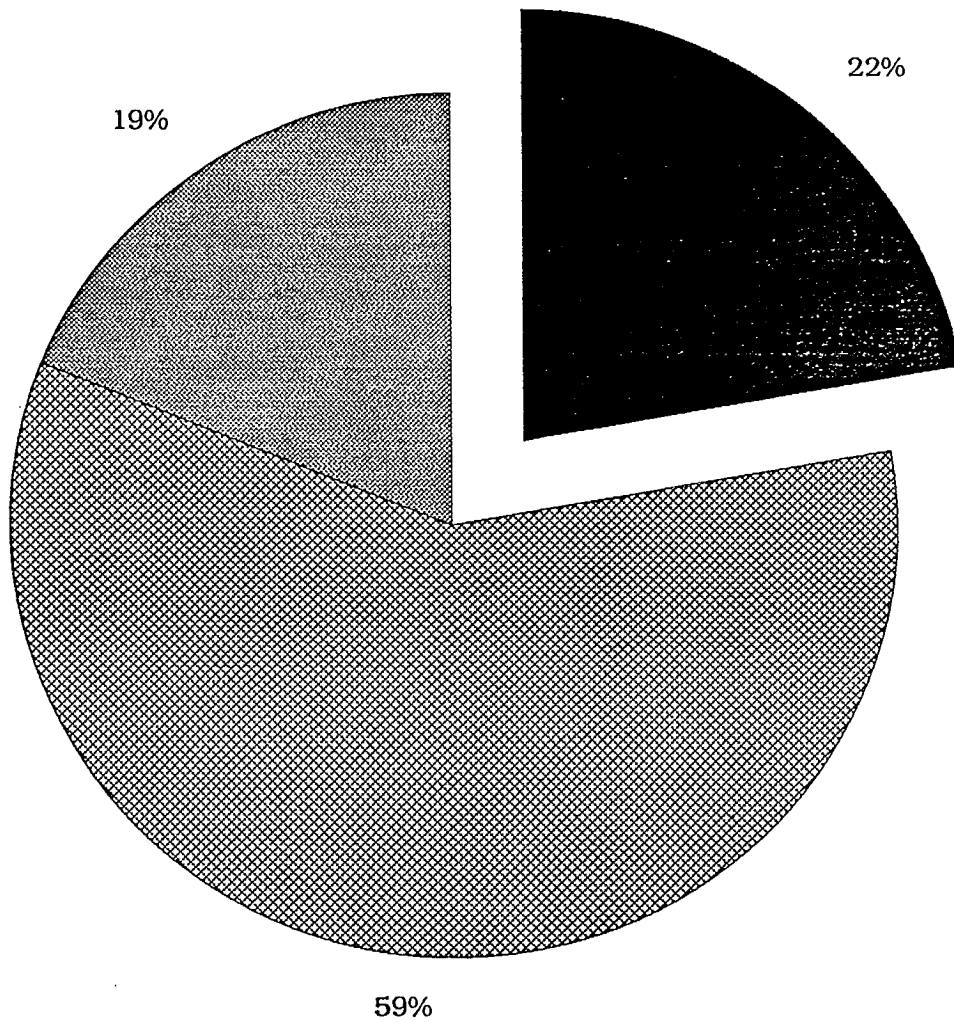
### 2.3 Focus Groups

In total, three focus groups were conducted after the preliminary survey results were available, to pursue specific issues in greater depth and thus ensure a better understanding of business needs for product-specific market information. The groups were conducted with the persons in charge of marketing for companies in Toronto and Winnipeg (both in English), as well as Montreal (in French). The findings from these groups were incorporated with the survey findings.

**EXHIBIT 2**  
**SAMPLE DISPOSITION**

	N	%
Respondent not reached	602	32
Number not in service	61	3
Wrong number	27	2
Duplicate	19	1
Refusal	106	6
Quota reached - Firm size 1 to 99 employees	171	9
Does not qualify - Not a manufacturer	75	4
Does not qualify - Does not need product-specific market information	143	8
Marketing function done at another location	100	5
Other reasons for non- completed interview	55	3
Completed interview	500	27
<b>TOTAL CONTACTS</b>	<b>1,859</b>	<b>100</b>

DIAGRAM 1 -- Need for Product-Specific Market Information



■ Never Need the Information    ▨ Currently Need Information    ▩ Will Need Information in the Future

### 3.0 SURVEY RESULTS ANALYSIS

#### 3.1 Current Usage of Information

##### Research Objective 1

To determine the usage of product-specific market information within Canadian manufacturing companies, as well as the importance of such information in decision-making.

##### Findings

To answer this research objective, respondents were asked to qualify their use of product-specific market information and identify the types of decisions supported by product-specific market information. As well, the respondents had to scale the importance of this information in decision-making. The survey results indicate that :

- o of the respondents that were asked if they needed product-specific market information (currently or in the future), 22% do not ever need such information (the interview with these respondents was terminated at this point and these respondents are therefore not a part of the sample of 500 companies), 59% currently need it, and 19% do not currently need it but will need this information in the future. Diagram 1 presents the breakdown of firms needing, or not needing, product-specific market information;
- o manufacturing firms in the sample used product-specific market information for the following purposes : market expansion (89%), product development (77%), product alteration (60%), and new investment (54%);
- o there exists a statistically significant relationship between firm size and the type of information needed. That is, for decisions regarding product development, small firms are more likely to rely on market information than larger firms (i.e. 80% vs 76% for medium-sized firms vs 72% for large firms). One should however note that the

majority of firms, in all cases, rely on market information for decisions regarding product development;

- o there is also a significant relationship between firm-size and the importance of product-specific market information. The results indicate that the larger the firm, the more likely it is to find the information more important (i.e. 71% vs 67% for medium-sized firms and 58% for small firms). Once again, one should note that the majority of firms, regardless of size, find the information very important;
- o the importance of information also varies between regions. That is, firms in British-Columbia (71%) and Quebec (69%) are more likely than firms in the Atlantic (56%) and Ontario (59%) to indicate that product-specific market information is very important to their organization. Here again, the majority of firms in all regions find the information very important.

Summary

Regardless of region, firm size and industry sector, the majority of Canadian manufacturing companies have identified a need for product-specific market information to help in various types of decision-making. These firms also consider this information to be very important to the decision-making process.

This information is for  
Canadian markets.



### Research Objective 2

To determine the type of product-specific market information that is needed by manufacturing firms, as well as the frequency of this need.

### Findings

Manufacturing executives were asked to identify the information they needed and the frequency of this need. The survey results indicate that :

- o the three most often requested types of product-specific market information are pricing information (by 69% of manufacturers), information on U.S. markets (63%), and information on Canadian markets (62%). The focus groups also supported these findings in that the representatives were mostly interested in pricing and other competitive information;
- o in total, 38% of the firms surveyed have in-house expertise to gather product-specific market information. These firms can gather industry-specific information (38%), information on U.S. markets (25%), pricing information (23%), as well as other types of information mentioned by less than 15% of those with such capabilities;
- o the frequency at which the different types of information are needed varies between the types of information. The following table presents the five most needed types of product-specific information and the frequency at which they are needed. Since market prices change regularly, it is not surprising that firms therefore need such information on a more frequent basis (three or more times per year) than any other type of information. And, since the market share of the top importers is not likely to change drastically over short periods of time, it is also not surprising to uncover that, even though the majority of firms need the information, they need it less frequently (i.e. once or twice per year).

Information	not needed	3 + more times/yr	twice per yr	once per yr	less often	don't know
pricing info	31%	28%	19%	21%	0%	1%
info on U.S. markets	37%	23%	19%	19%	1%	1%
info on Canadian markets	38%	22%	20%	19%	0%	1%
trends in imports	43%	13%	16%	27%	0%	1%
market share of importers	46%	14%	16%	23%	0%	1%

Summary

The information most needed by Canadian organizations relates to pricing conditions, the U.S. and Canadian markets, trends in imports and the market share of top importers. Although the frequency of the need for information varies widely between manufacturing firms, it appears that a large number of firms would be satisfied with two updates per year of their information base.

information documents <sup>in favor of</sup> ~~against~~  
large firms

- 60% of firms (from 6% total sample)  
can access info.

Research Objective 3

To identify any gaps in the information needs of Canadian companies and the factors contributing to them.

Findings

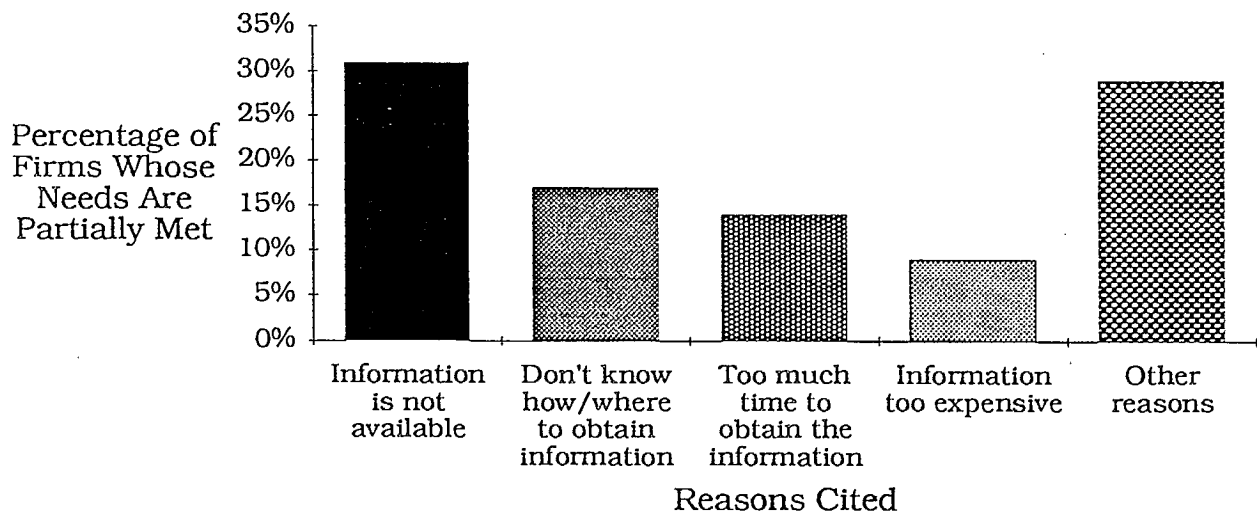
Respondents were asked to identify information needs that were not currently being met, the reasons why those needs were not met, and what they did to compensate for these situations. The survey results indicate that :

- o only 14% of the respondents indicated that all their information needs were currently met; another 32% said most, 48% indicated some, while 6% indicated that none of their information needs were met;
- o a significantly higher percentage of large firms indicated that all their information needs are being met (i.e. 19%, as compared to 12% for medium-sized firms and 13% for small firms), and a significantly higher percentage of small firms reported that none of their information needs are being met (i.e. 10% for small firms, vs 4% for medium-sized firms, and 0% for large firms);
- o those whose needs are not met at all<sup>1</sup> consider this lack to be very serious (43%) or serious (39%). Only 17% indicated that this was not serious at all. The reasons given for not being able to obtain the information include : firms do not know where or how to obtain it (30%); they think the information is simply not available (17%); or they lack personnel with the expertise to obtain it (13%). Firms compensate for this lack mostly through contacts with other players (35%).

---

<sup>1</sup> Because of small sample sizes (n=23), these results must be interpreted with care.

DIAGRAM 2 -- Reasons Why Information Needs Are Not Always Met



- o for manufacturing organizations whose product-specific market information needs are partially met, the following information needs are not currently being met : industry-specific information (in 29% of cases in our sample), information on Canadian markets (18%), information on U.S. markets (13%), and pricing information (12%). It is noteworthy that the last three items are those items which were mentioned earlier as being the most required ones (see research objective 2);
  
- o of firms for which not all of their product-specific market information needs are met, the needs are not met for the following reasons : information is not available in 31% of cases, the respondent does not know where or how to obtain the information (17%), and the information takes too much time to obtain (14%). Diagram 2 presents the reasons why the companies' information needs are not met. The focus groups also suggested that firms either think that the information is not available to the public, that they don't know where to get it, or that they don't have time to look for it. It was generally felt that it took so much effort to read and digest information that the representatives were not certain was going to be useful in the end that they often did not bother to even look it up;
  
- o the reason cited most often by large firms for explaining the fact that not all of their information needs are met is that the information is not available (43% of cases). This figure is 34% for medium-sized firms and 24% for small firms. A possible explanation for this situation is that larger firms may tend to have more sophisticated information needs that are more difficult to meet;

Summary

The availability of information represents the main barrier to the fulfilment of Canadian manufacturing organization information needs, followed by the lack of knowledge of where or how to obtain the information. The information gaps of manufacturing organizations correspond to the information that they most often require.

This cites the lack of  
confidence and frustration that  
has been in attempting to  
locate gov + produced data.

Private or Public?

### 3.2 Sources of Information

#### Research Objective 4

To identify the sources of information used by Canadian manufacturing organizations, their associated costs, relative quality, accessibility and timeliness.

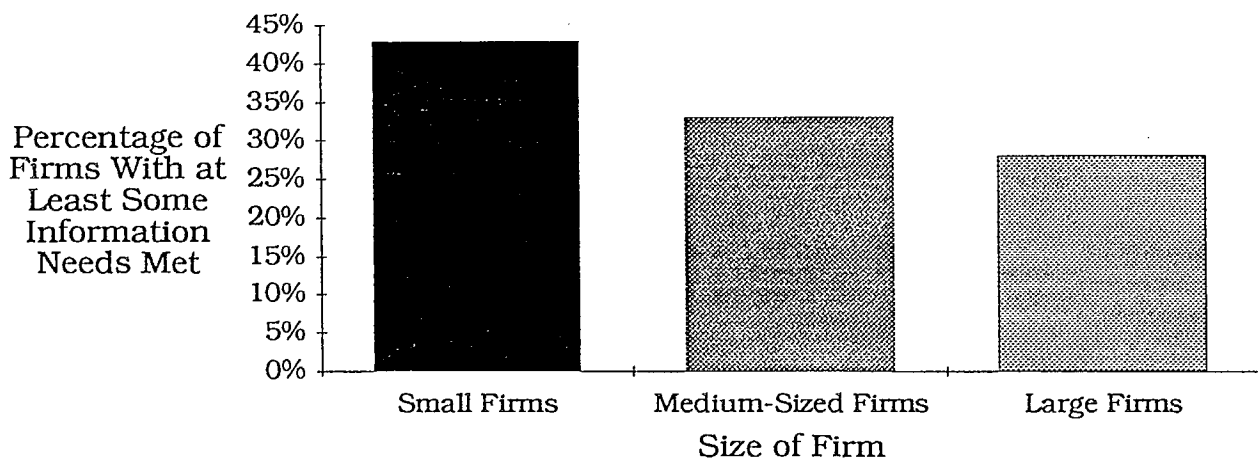
#### Findings

Respondents were asked to identify all sources of information that they are currently using and the characteristics of these sources regarding costs, the quality of information, the amount of information, accessibility of the source and its information, as well as the time that is required to obtain information from the source. Survey results indicate that :

- o half (50%) the firms with current information needs have in-house expertise to gather information;
- o the larger the firm, the higher the probability of having in-house expertise to gather information (i.e. 66% of the large firms needing product-specific market information have in-house expertise vs 51% of medium-sized firms and 44% of small firms);
- o of organizations with current information needs, the sources consulted most often are: publications (by 60%), associations (35%), personal contacts (26%), Statistics Canada (17%), and Federal Government Departments other than Statistics Canada, External Affairs Canada, and Industry, Science and Technology (14%). ISTC/DRIE is used by only 1% of these organizations. The focus groups demonstrated that there are three likely reasons for this low level of usage: people are not aware of the department and/or its services, people don't like using government sources for business because they are not relevant (i.e. they are hard to follow, government does not understand business needs etc.), or they have the impression that information available through a government source will be at least six months out of date. A list of publications and associations cited by respondents as sources of product-specific market information can be found in Annex C;



DIAGRAM 3 -- Percentage of Firms Using Cost-Free Information Sources



- o two-thirds (64%) of respondents indicated that there was some cost involved for using their current sources of information. The following table presents a comparative analysis of the five most often used sources and their associated costs:

SOURCE	Used by % of sample	Free for % of users	Under 500\$ for % of users (cumulative)	Under \$1000 for % of users (cumulative)
publications	60	5	48	62
associations	35	10	35	48
contacts	26	18	24	28
Statistics Canada	17	16	47	65
Other Federal Departments	14	53	64	69

- o small firms use significantly more cost-free information sources than larger firms (i.e. 43% of sources are free for small firms vs 33% for medium-sized firms and 28% for large firms). Diagram 3 outlines the relationship between the size of the company and the percentage of these firms using free information sources. Supporting this trend, the focus group participants representing smaller firms were more interested than the larger firms in finding out more about free or cheaper sources of information such as those offered by government;
- o Exhibit 4 summarizes respondents' ratings of the sources of information they use. This exhibit shows that personal contacts is most often cited (by 17% of respondents using more than one source) as the best source for the quality of the information it provides. Other well rated sources were associations (12%) and publications (10%). Even though these sources were also mentioned during the focus groups, another

- ① out of date data;
- ② diff. to access (cube?)
- ③ diff. to interpret: not  
value added; low data

source that came up frequently were its U.S. databases. These were considered to contain:

- more up to date information;
  - information on Canadian firms that is not available in Canada;
  - information that is more relevant; and/or
  - information that is presented in a format that is easy to read.
- o the most often cited sources as the best in terms of the amount of information provided were : publications (by 16% of respondents using more than one source), associations (13%), and personal contacts (12%);
- o in comparing the value for money from the different sources, these were most frequently considered to be best : personal contacts (by 13%of respondents using more than one source), publications (11%), and associations (9%). It is noteworthy that government departments such as Statistics Canada did not score high on this item, with only 3% of respondents mentioning it as the source providing the best value for money (even if its fees are among the lowest). The focus groups enlightened us on the reasons for this. Specifically, respondents felt that it sometimes takes so much time to find the appropriate person that even though the information is free the time spent is not worth it. Also the information is at last six months out of date. Another area of criticism is that the way in which the information is presented is not conducive to easy reading;
- o respondents using more than one source identified the easiest source to access as being publications (20% of mentions), personal contacts (13%), and associations (11%);

EXHIBIT 4

SUMMARY OF SOURCES OF INFORMATION USED

	Used	Free	Median Cost	Best Quality	Best Amt	Best Value	Most Easy to Use	Most Easy to Access	Most difficult	Turn-around time	% acceptable
Publications	60%	5%	501-1000	10%	16%	11%	82%	20%	19%	1wk	79%
Associations	35%	10%	<500	12%	13%	9%	93%	11%	6%	1wk	84%
Personal Contacts	26%	18%	1001-10000	17%	12%	13%	60%	13%	11%	1day	85%
Statistics Canada	17%	16%	<500	2%	4%	3%	66%	3%	11%	2wks	62%
Other Fed'l Departments	14%	53%	0	2%	2%	2%	77%	2%	4%	2wks	67%

- o respondents using more than one source identified the most difficult source to access as being publications (19%), personal contacts (11%), and Statistics Canada (11%). Publications and personal contacts are cited both as easiest and most difficult sources to use. This can be explained by the fact that these sources are frequently used, implying that a potentially larger number of respondents can attest to their accessibility. Another reason, as depicted in the focus groups, is that even though publications and personal contacts are easy to access in the sense that they are there and available, participants felt that because there was such a wealth of such information out there, it was hard to access it all or to be certain that one was accessing the best source to make the decision at that time;
- o general accessibility (22%), direct personal contact with the source (16%), and the tailoring of information in response to the firm's needs (10%) are the three main criteria for making a source easy to access;
- o general lack of accessibility (17%), the lack of tailoring of information in response to the firm's needs (14%), and the slow turnaround time for obtaining the information (11%) are the three main criteria for making a source most difficult to access;
- o the following table presents a comparative analysis of the five most often used sources of information and their respective turnaround times. The total of percentages does not add to 100, as slower turnaround time categories are not included in the table. The table also shows that the majority of respondents find that the turnaround time is acceptable (more for users of associations, contacts and publications than for users of Statistics Canada or other federal government departments);

SOURCE	Immediately /Same day	Within a week	Within 2 weeks	Within a month	% acceptable
publications	20%	29%	12%	23%	79%
associations	23%	44%	10%	14%	88%
contacts	37%	38%	4%	7%	85%
Statistics Canada	12%	27%	17%	8%	62%
Other Federal Departments	16%	26%	12%	23%	67%

- o only one third of the respondents (29%) are aware of sources of information other than those used by their firm. The sources have never been used for the following reasons : source is too expensive (36%), the information takes too much time to obtain (10%), and there is no need for the source and its information (10%);
- o "other" sources of information named most frequently are: publications (15%), associations (10%), and other federal government departments (8%);
- o the type of information available from these sources is mainly industry-specific information (26%) and market survey information (12%);
- o there is a statistically significant relationship between the size of the firm and the respondent's awareness of sources of information never used by their firm. Smaller firms are less likely (25%) to know about information sources and never having used them than larger firms (i.e. 32% for medium-sized firms and 35% for large firms);

- o most firms (73%) are unaware of databases that provide product-specific market information. However, large firms (35%) are more likely to know about databases than smaller firms (29% for medium-sized firms and 23% for small firms);

Summary

The most frequently used sources are publications, associations, personal contacts, Statistics Canada and other Federal Government departments. The most frequently used sources score among the highest as far as the quality and amount of information, and the value for money are concerned. There exists a polarization of opinions vis-à-vis publications and personal contacts, as these sources have been identified as easiest and most difficult to access sources. The following criteria play a key role in the selection of information sources : general accessibility, the tailoring of information in response to client needs, the existence of a direct personal contact between the source and the client, and the time necessary to obtain information from the source. For the five most used sources, the data suggests that a turnaround time of one week is reasonable and would be sufficient for approximately 63% to 88% of cases. The most common barriers to using information sources are the fees for using the source, the time necessary to obtain information from the source, and the lack of a need for the source and its information.



### 3.3 Future Information Needs

#### Research Objective 5

To determine how the product-specific market information needs of Canadian manufacturing organizations will change over the next three years, and what type of information will be needed over this period.

#### Findings

Executives were asked to identify how their needs will change over the next three years, what information items they would be interested in over the period, and what would be an appropriate source for providing this information. Survey results indicate that :

- o 69% of Canadian manufacturing firms indicated that their product-specific market information needs will change over the next three years;
- o of those whose needs will change, 28% will need more information, 19% will need information on new markets, 17% will need more specific and detailed information, and 15% will need information on new products;
- o the five information services that will be most interesting to manufacturing firms are:
  - knowledge on what, and where, market information is available for a specific product (90% of firms were either interested or very interested for this information service);
  - information on trends, tariff and non-tariff barriers for a specific product (82%);
  - detailed production data for a specific product for Canada and other countries (78%);
  - information on exports from the U.S. for a specific product (78%);
  - information on imports to the U.S. for a specific product (75%);

What percentages ???

- ① believe better sources exist besides ISZ
- ② believe other sources are more reliable.

These conclusions are grossly vague and provide little in the way of enabling a strategic response.

- o the federal department of Industry, Science and Technology is considered to be a reliable source by 75% of the respondents, on average, for all information services presented to them. However, when probing more deeply into this issue through focus groups, several points of interest were uncovered. In the Montreal groups, the interest was very high in finding out more about a source the participants were unaware of, and in trying it out once. If unsuccessful, they would not reuse it. In Winnipeg, the group was so opposed to government as a source of information that the participant refused to even consider trying it. They felt that government should not, nor was it qualified to, be involved in helping industry this way. The Toronto group was split half thinking ISTC would be a good source of information whereas the other half felt the same way as the Winnipeg representatives. The second half tended to represent larger firms with sufficient internal resources to pay for consultants to do a better job than the government could;
- o sources perceived as better than ISTC for providing these information services are : associations (by 12% of respondents that said that ISTC would not be a reliable source), other federal departments (10%), other countries (9%), and publications (7%);
- o sources are considered more reliable than ISTC for the following reasons: that another source is closer to the market and product (by 33% of the respondents that said that ISTC would not be a reliable source), that the government is not a reliable source (19%), and that the information is more specific to their needs with another source (10%). These findings were supported by the focus groups.

#### Summary

Information needs will change for the majority of Canadian manufacturing companies. Companies will need more information, information on new markets and new products, as well as more specific and detailed information. An overwhelming number of manufacturing companies want to know what and where market information is available for their product. They are also interested in a number of other information services. ISTC is considered a reliable source for providing these information services by the majority of executives.

#### 4.0 CONCLUSIONS

1. If ISTC were to provide an information service whereby manufacturing companies would know what and where product-specific market information is available, it would undoubtedly respond to the needs of manufacturers. The main barrier to meeting manufacturers' needs is the limited availability of information as well as the knowledge of where and how to obtain the information. The role of information broker that ISTC is considering taking would be an appropriate response to these needs. In fact, the presence of an information broker in the research process would accelerate this process and, in so doing, would address the third most important reason why information needs are not met, that is, that the information takes too much time to obtain.
2. For a source to be widely used by Canadian manufacturing companies, it must, as a minimum requirement, provide superior quality and amount of information, as well as competitive value for money. An information source should not be content with providing good information to its clients. To be successful in reaching the broadest possible client base, it must make itself accessible to client organizations, have the capacity to tailor the information to the specific needs of the clients, provide a direct personal contact to them, and be in a position to provide the information on short notice.
3. ISTC would fulfil the needs of many Canadian manufacturing organizations by offering information on what, and where, market information is available for the specific products of manufacturers. ISTC is considered a reliable source for offering information services by the majority of manufacturers. Three barriers should, however, be overcome by the department in order to ensure greater credibility in the eyes of manufacturers : it should make itself closer to the market and products, promote its reliability as an information source, and provide information that responds to the specific needs of its clients.

① Access/Awareness to be improved !!

② But, what are the press needs.

ANNEX A

**Questionnaire**

**MARKET INTELLIGENCE SERVICE STUDY  
- BUSINESS NEEDS ASSESSMENT SURVEY -**

ASK TO SPEAK TO MARKETING MANAGER OR PERSON RESPONSIBLE FOR MARKETING.

Good morning/afternoon. My name is \_\_\_\_\_ and I'm calling from Young & Wiltshire a management consulting firm. You recently should have received a letter explaining that we have been commissioned by the federal department of Industry, Science and Technology to find out what are the product-specific market information needs of Canadian companies. If this is a convenient time, we would like to ask you some questions on this subject. IF RESPONDENT HAS NOT RECEIVED THE LETTER, READ THE FOLLOWING PARAGRAPH:

Sensitive business information is protected under the provisions of Section 20 of the Access to Information Act. Any information contained in the survey, which cannot be disclosed because of the provisions of Section 20 of the Access to Information Act, will be treated as strictly confidential. There is no obligation to participate in the survey and responses are to be provided on a voluntary basis.

Since this survey deals with product-specific market information needs, it may be useful to clarify certain terms before we start the interview.

Whenever we mention "product-specific" we are referring to specific products relevant to your firm rather than broader product categories. For example, you should think of: READ APPROPRIATE EXAMPLES DEPENDING ON SECTOR.

**01, 02, 03: SURFACE TRANSPORTATION AND MACHINERY**

- Floating or Submersible drilling platforms VERSUS Marine Equipment
- Vane type rotary positive displacement pump for liquids VERSUS Machinery Equipment
- Self-propelled Levellers for use on the Farm VERSUS Agricultural Equipment
- Tungsten Halogen filament lamps with quartz containers VERSUS Electrical Equipment
- Laser Printers VERSUS Computer Equipment
- Vermicelli VERSUS Pasta

**04, 05, 06: AEROSPACE, DEFENCE AND INDUSTRIAL BENEFITS**

- Spacecraft laminated safety glass VERSUS Glass Products
- Satellites VERSUS Space Systems
- Laser Printers VERSUS Computer Equipment
- Vermicelli VERSUS Pasta

07: INFORMATION TECHNOLOGIES INDUSTRY

- Laser Printers VERSUS Computer Equipment
- Monolithic Integrated Digital Circuits VERSUS Microelectronics

08, 09, 10, 11: RESOURCE PROCESSING INDUSTRIES

- Western Red Cedar Shingles VERSUS Wood Products
- Glazed hollow building bricks VERSUS Mineral Products
- Round, alloy steel, hollow drill bars and rods VERSUS Steel Products
- Wrought, drainage refined copper tube or pipe fittings VERSUS Metal Products
- Zeolites VERSUS Chemicals Industry
- Prednisone VERSUS Pharmaceutical Products
- Needles for Sutures VERSUS Medical Equipment
- Laser Printers VERSUS Computer Equipment
- Vermicelli VERSUS Pasta

12, 13, 14: CONSUMER GOODS

- Metal Medicine Cabinets VERSUS Furniture
- Wooden Cedar Chests VERSUS Furniture
- Printed Labels of Aluminum Foil VERSUS Printed Matter
- Earthenware teapots VERSUS Housewares
- Field Hockey Sticks VERSUS Sporting Goods
- Candied Popcorn or Bubble Gum VERSUS Sugar Confectionery
- Vermicelli VERSUS Pasta
- Frozen concentrated lemon juice VERSUS Fruit Juices
- Women's Polyester-Cotton Overcoats VERSUS Clothing
- Boy's Nylon Skisuits VERSUS Clothing
- Cotton Tarpaulins VERSUS Textile Products
- Men's/Boy's Curling Boots VERSUS Footwear
- Football Helmets VERSUS Headgear



SECTION 1: SCREENING

1. How many people does your company employ on a full-time basis?  
READ LIST?

- |                       |   |                      |     |
|-----------------------|---|----------------------|-----|
| Between 1 and 99      | 1 |                      |     |
| Between 100 and 499   | 2 | CHECK QUOTA          | (4) |
| 500 employees or more | 3 |                      |     |
| DON'T KNOW/REFUSED    | 4 | THANK &<br>TERMINATE |     |

2. DO NOT ASK BUT RECORD REGION:

- |                  |   |             |     |
|------------------|---|-------------|-----|
| ATLANTIC         | 1 |             |     |
| QUEBEC           | 2 |             |     |
| ONTARIO          | 3 | CHECK QUOTA | (5) |
| PRAIRIES         | 4 |             |     |
| BRITISH COLUMBIA | 5 |             |     |

3. DO NOT ASK BUT RECORD INDUSTRY SECTOR:

- |                                  |    |             |       |
|----------------------------------|----|-------------|-------|
| AUTOMOTIVE                       | 01 |             |       |
| MARINE, URBAN & RAIL MACHINERY   | 02 |             |       |
| ELECTRICAL AND ENERGY EQUIPMENT  | 03 |             |       |
| AIRCRAFT PROPULSION AND MISSILES | 04 |             |       |
| DEFENCE ELECTRONICS AND SPACE    | 05 |             |       |
| MARINE AND LAND DEFENCE SYSTEMS  | 06 |             |       |
| INFORMATION TECHNOLOGIES         | 07 | CHECK QUOTA | (6-7) |
| FOREST PRODUCTS                  | 08 |             |       |
| METALS AND MINERALS              | 09 |             |       |
| CHEMICALS                        | 10 |             |       |
| BIOTECHNOLOGY & HEALTH CARE      | 11 |             |       |
| CONSUMER PRODUCTS                | 12 |             |       |
| FOOD PRODUCTS                    | 13 |             |       |
| TEXTILES, CLOTHING AND FOOTWEAR  | 14 |             |       |

4. Is your organization involved in the manufacturing of products?

- |     |   |                          |     |
|-----|---|--------------------------|-----|
| YES | 1 |                          | (8) |
| NO  |   | 2 - THANK &<br>TERMINATE |     |

5. a) Does your organization ever need, product specific market information?

YES

1- SKIP TO Q.6

(9)

NO

2

5. b) Do you see your organization ever needing product-specific market information in the future?

YES

1

(10)

NO

2 -THANK &  
TERMINATE

6. a) Has your organization ever used any of the information services provided by Industry Science and Technology Canada that is, the federal department of industry? IF RESPONDENT SAYS THAT HE/SHE WOULD BE INTERESTED IN RECEIVING INFORMATION ON THESE, RECORD ON RECORD OF CALL SHEET.

YES

1- CHECK QUOTA

(11)

NO

2 -CHECK QUOTA  
SKIP TO Q.7

6. b) Which ones have you used? PROBE: Any others?

---

---

---

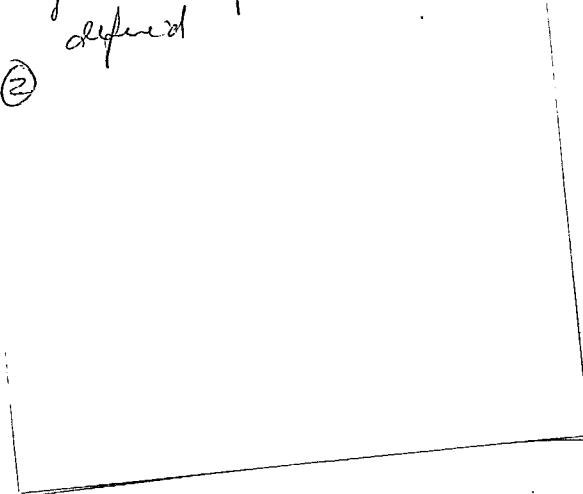
---

12-13

14-15

16-17

① prod. specific info. et not defined  
②



**SECTION 2: WAYS INFORMATION USED**

7. Why does or could your organization need product-specific market information? Is it to help in making decisions regarding: **READ LIST CIRCLE. ONE PER LINE.**

	<u>YES</u>	<u>NO</u>	
New product development	1	2	(18)
Product alteration	1	2	(19)
Market expansion	1	2	(20)
New investment in Canada	1	2	(21)
To make other types of decisions (SPECIFY)			
_____	1		<u>22-23</u>
_____	1		<u>24-25</u>
_____	1		<u>26-27</u>

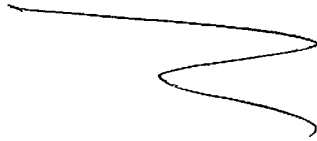
8. On a scale of 1 to 10 where a "1" means that the information is not at all important and a "10" means that the information is extremely important, please tell me how important product-specific market information is in helping you make decisions such as the one you just mentioned?

<u>NOT AT ALL</u> <u>IMPORTANT</u>	<u>EXTREMELY</u> <u>IMPORTANT</u>	<u>DON'T</u> <u>KNOW</u>
1   2   3   4   5   6   7   8   9   10		99   (28-29)

9. Product-specific market information is usually only one of many factors used by organizations to help them make the types of decisions you just mentioned (IF NECESSARY, READ LIST OF ITEMS MENTIONED IN Q.7). What other factors would your organization rely on to help in making these decisions? **PROBE:** Any other factors?

	<u>30-31</u>
	<u>32-33</u>
	<u>34-35</u>

These are informational  
requirements, but they are  
not all product-specific "



SECTION 3: USAGE

ASK SECTION 3 ONLY IF YES IN Q. 5. a) OTHERS SKIP TO Q.30.

10. What product-specific information on markets does your organization require? That is, what specific information do you need? READ LIST. PROBE: Any other types? CIRCLE ALL THAT APPLY.

	Q. 10	Q. 11		Q. 12		
		# PER YEAR	EVERY 7 YEAR	DON'T KNOW	RANK	
For a specific product of interest the:						(5X2)
✓ Names of Canadian Suppliers	01	---	---	99	---	(36-45)
✓ Information on Canadian Markets	02	---	---	99	---	(46-55)
✓ Information on U.S. Markets	03	---	---	99	---	(56-65)
Names of Major Foreign Exporters to Canada	04	---	---	99	---	(66-75)
Names of Importers to Canada	05	---	---	99	---	(1-10)
✓ Country of Origin for product	06	---	---	99	---	(11-20)
Country Exporting product to Canada	07	---	---	99	---	(21-30)
Value of Canadian Imports	08	---	---	99	---	(31-40)
✓ Number of Units Imported to Canada	09	---	---	99	---	(41-50)
✓ Pricing Information	10	---	---	99	---	(51-60)
✓ Annual Changes & Trends in Imports	11	---	---	99	---	(61-70)
✓ Number of Imports	12	---	---	99	---	(71-80)
Ports of Entry	13	---	---	99	---	(1-10)
✓ Market Share of Top Importers	14	---	---	99	---	(11-20)
Information on European Economic Community (EEC) Market	15	---	---	99	---	(21-30)
Other Types of Information (Specify)						
_____	16	---	---	99	---	(31-40)
_____	17	---	---	99	---	(41-50)
_____	18	---	---	99	---	(51-60)
_____	19	---	---	99	---	(61-70)
_____	20	---	---	99	---	(71-80)

11. How often do you require this information? RECORD FOR EACH MENTION IN Q.10. RECORD ABOVE IN TIME PER YEAR OR EVERY? YEARS. IF RESPONDENT SAYS CONTINUOUSLY, ASK HOW OFTEN INFORMATION IS RECEIVED OR UPDATED.

12. IF MORE THAN ONE IN Q.10 ASK: Which of these types of product specific information do you consider to be the most important? IF MORE THAN TWO, ASK: Second most important? IF MORE THAN THREE, ASK: Third most important? RECORD ONLY THREE MOST IMPORTANT ABOVE UNDER Q.12.

13. Do you have in-house expertise to gather any of this information?

YES

1

( 1 )

NO

2-SKIP TO Q.15

14. Which information can you gather using in-house expertise? PROBE:  
Any other types of information?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2-3

4-5

6-7

15. How much of your organization's product-specific market information needs are currently being met? READ LIST?

All

1 -SKIP TO Q.21

Most

2 -SKIP TO Q.19

(8)

Some

3 -SKIP TO Q.19

None

4 - ASK Q.16

16. How serious a problem do you consider this lack of information to be?  
READ LIST.

Very serious

1

Serious

2

(9)

Not serious at all

3

17. Why can't you obtain the information you require? PROBE FULLY.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

10-11

12-13

14-15

18. What do you do to compensate for this lack of information? PROBE:  
Anything else?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

16-17

18-19

20-21

SKIP TO Q.30

19. Which needs are not currently met? PROBE: Any others?

_____	<u>22-23</u>
_____	<u>24-25</u>
_____	<u>26-27</u>

20. Why are these needs not met? PROBE: Any other reasons? DO NOT READ LIST.

INFORMATION NOT AVAILABLE	01	<u>38-39</u>
TOO EXPENSIVE	02	
TAKES TOO MUCH TIME TO OBTAIN	03	<u>40-41</u>
TOO MUCH WORK INVOLVED IN		<u>42-43</u>
GETTING INFORMATION	04	
DON'T KNOW HOW TO GET IT	05	<u>44-45</u>
OTHER (SPECIFY)		<u>46-47</u>
_____	06	
_____	07	
_____	08	
NOT SURE	99	

21. From which sources are you currently obtaining product-specific market information? That is, where do you get the information you need? PROBE: Any others? DO NOT READ LIST.

EMBASSIES	01	
LIBRARIES	02	<u>48-49</u>
CONSULTANTS	03	
BANKS/CREDIT COMPANIES	04	<u>50-51</u>
PUBLICATIONS (SPECIFY)		
_____	05	<u>52-53</u>
OTHER COUNTRIES	06	
PERSONAL CONTACTS/WORD OF MOUTH		<u>54-55</u>
TRADE SHOWS	07	<u>56-57</u>
EXPERTS	08	
ISTC/DRIE	09	<u>58-59</u>
STATISTICS CANADA	10	
EXTERNAL AFFAIRS CANADA	11	<u>60-61</u>
OTHER FEDERAL GOVERNMENT DEPARTMENTS (SPECIFY)	12	<u>62-63</u>
_____	13	<u>64-65</u>
_____	14	
PROVINCIAL GOVERNMENT DEPARTMENTS (SPECIFY)		<u>66-67</u>
_____	15	<u>68-69</u>
_____	16	
ASSOCIATIONS (SPECIFY)		<u>70-71</u>
_____	17	
_____	18	<u>72-73</u>
OTHERS SPECIFY		
_____	19	<u>74-75</u>
_____	20	
_____	21	<u>76-77</u>
IN-HOUSE	98	<u>78-79</u>

22. Are there any costs associated for obtaining the information from any of these sources?

YES	1	
NO	2-SKIP TO Q.24	(80)



23. For each source used, what are the associated costs, in dollars per year? IF NO COST WRITE "0". IF SOURCE NOT USED FROM Q.21 CIRCLE 98 FOR NOT APPLICABLE. IF DON'T KNOW, ASK FOR BEST GUESS - IF CANNOT ESTIMATE, CIRCLE 99 FOR DON'T KNOW.

	<u>COST IN</u> <u>DOLLARS</u>	<u>NOT</u> <u>APPLICABLE</u>	<u>DON'T</u> <u>KNOW</u>	
(01) EMBASSIES	_____	98	99	(1-6)
(02) LIBRARIES	_____	98	99	(7-12)
(03) CONSULTANTS	_____	98	99	(13-18)
(04) BANKS/CREDIT COMPANIES	_____	98	99	(19-24)
PUBLICATIONS (SPECIFY)				
(05) _____	_____	98	99	(25-30)
(06) OTHER COUNTRIES	_____	98	99	(31-36)
(07) PERSONAL CONTACTS/ WORD OF MOUTH	_____	98	99	(37-42)
(08) TRADE SHOWS	_____	98	99	(43-48)
(09) EXPERTS	_____	98	99	(49-54)
(10) ISTC/DRIE	_____	98	99	(55-60)
(11) STATISTICS CANADA	_____	98	99	(61-66)
(12) EXTERNAL AFFAIRS CANADA	_____	98	99	(67-72)
OTHER FEDERAL GOVT DEPARTMENTS (SPECIFY)				
(13) _____	_____	98	99	(73-78)
(14) _____	_____	98	99	(1-6)
PROVINCIAL GOVT DEPARTMENTS (SPECIFY)				
(15) _____	_____	98	99	(7-12)
(16) _____	_____	98	99	(13-18)
ASSOCIATIONS (SPECIFY)				
(17) _____	_____	98	99	(19-24)
(18) _____	_____	98	99	(25-30)
OTHERS (SPECIFY)				
(19) _____	_____	98	99	(31-36)
(20) _____	_____	98	99	(37-42)
(21) _____	_____	98	99	(43-48)
(22) IN-HOUSE	_____	98	99	(49-54)

24. ASK ONLY IS MORE THAN ONE MENTION IN Q.21. Based on your experience with each source, which of the sources you use is the best in terms of: READ LIST, RECORD # OF SOURCE FROM Q.21 OR Q.23 ABOVE.

	SOURCE #	ALL THE SAME	DON'T KNOW	
The quality of the information received	_____	98	99	(55-56)
The amount of information available	_____	98	99	(57-58)
Value for money	_____	98	99	(59-60)

25. How consistent is the information received from the best source from one time to the next in terms of: READ ITEM THEN SCALE. CIRCLE ONE NUMBER PER LINE.

	Very Consistent	Consistent	Inconsistent	Very Inconsistent	Don't know/only used once	
The quality of the information received	1	2	3	4	5	(61)
The amount of information available	1	2	3	4	5	(62)
The costs for obtaining the information	1	2	3	4	5	(63)

26. How difficult is it to obtain information from: READ SOURCES USED FROM Q.21 THEN SCALE.

	Very Easy	Easy	Difficult	Very Difficult	Don't Know	
(01) EMBASSIES	1	2	3	4	5	(64)
(02) LIBRARIES	1	2	3	4	5	(65)
(03) CONSULTANTS	1	2	3	4	5	(66)
(04) BANKS/CREDIT CO.	1	2	3	4	5	(67)
PUBLICATIONS (SPECIFY)						
(05) _____	1	2	3	4	5	(68)
(06) OTHER COUNTRIES	1	2	3	4	5	(69)
(07) PERSONAL CONTACTS, WORD OF MOUTH	1	2	3	4	5	(70)
(08) TRADE SHOWS	1	2	3	4	5	(71)
(09) EXPERTS	1	2	3	4	5	(72)
(10) ISTC/DRIE	1	2	3	4	5	(73)
(11) STATISTICS CANADA	1	2	3	4	5	(74)
(12) EXTERNAL AFFAIRS CANADA	1	2	3	4	5	(75)
OTHER FEDERAL GOVT DEPARTMENTS (SPECIFY)						
(13) _____	1	2	3	4	5	(76)
(14) _____	1	2	3	4	5	(77)
PROVINCIAL GOVT DEPARTMENTS (SPECIFY)						
(15) _____	1	2	3	4	5	(78)
(16) _____	1	2	3	4	5	(79)
ASSOCIATIONS (SPECIFY)						
(17) _____	1	2	3	4	5	(80)
(18) _____	1	2	3	4	5	(1)
OTHERS (SPECIFY)						
(19) _____	1	2	3	4	5	(2)
(20) _____	1	2	3	4	5	(3)
(21) _____	1	2	3	4	5	(4)
(22) IN-HOUSE	1	2	3	4	5	(5)

ASK ONLY IF MORE THAN ONE MENTION IN Q. 21, OTHERS SKIP TO Q.29.

27. a) Of those sources you use, which one source is easiest to access/get information from? DO NOT READ LIST.

- |   |                     |
|---|---------------------|
| EMBASSIES   | 01                  |
| LIBRARIES   | 02                  |
| CONSULTANTS                                       | 03                  |
| BANKS/CREDIT COMPANIES                            | 04                  |
| PUBLICATIONS (SPECIFY)                            |                     |
| _____   | 05                  |
| OTHER COUNTRIES                                   | 06                  |
| PERSONAL CONTACTS/WORD OF MOUTH                   | 07                  |
| TRADE SHOWS                                       | 08                  |
| EXPERTS   | 09                  |
| ISTC/DRIE   | 10                  |
| STATISTICS CANADA                                 | 11                  |
| EXTERNAL AFFAIRS CANADA                           | 12                  |
| OTHER FEDERAL GOVERNMENT DEPARTMENTS (SPECIFY)    |                     |
| _____   | 13                  |
| _____   | 14                  |
| OTHER PROVINCIAL GOVERNMENT DEPARTMENTS (SPECIFY) |                     |
| _____   | 15                  |
| _____   | 16                  |
| ASSOCIATIONS (SPECIFY)                            |                     |
| _____   | 17                  |
| _____   | 18                  |
| OTHERS SPECIFY                                    |                     |
| _____   | 19                  |
| _____   | 20                  |
| _____   | 21                  |
| IN-HOUSE  | 22                  |
| NONE  | 98-SKIP TO Q.28. a) |
| ALL THE SAME/DON'T KNOW                           | 99-SKIP TO Q.29)    |

6-7

27. b) Why? PROBE: Any other reasons.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8-9

10-11

12-13

28. a) Which source is the most difficult to access/get information from? DO NOT READ LIST.

- |   |                 |              |
|---|-----------------|--------------|
| EMBASSIES   | 01              |              |
| LIBRARIES   | 02              |              |
| CONSULTANTS                                       | 03              |              |
| BANKS/CREDIT COMPANIES                            | 04              |              |
| PUBLICATIONS (SPECIFY)                            |                 |              |
| _____   | 05              |              |
| OTHER COUNTRIES                                   | 06              |              |
| PERSONAL CONTACTS/WORD OF MOUTH                   | 07              |              |
| TRADE SHOWS                                       | 08              |              |
| EXPERTS   | 09              | <u>14-15</u> |
| ISTC/DRIE   | 10              |              |
| STATISTICS CANADA                                 | 11              |              |
| EXTERNAL AFFAIRS CANADA                           | 12              |              |
| OTHER FEDERAL GOVERNMENT DEPARTMENTS (SPECIFY)    |                 |              |
| _____   | 13              |              |
| _____   | 14              |              |
| OTHER PROVINCIAL GOVERNMENT DEPARTMENTS (SPECIFY) |                 |              |
| _____   | 15              |              |
| _____   | 16              |              |
| ASSOCIATIONS (SPECIFY)                            |                 |              |
| _____   | 17              |              |
| _____   | 18              |              |
| OTHERS SPECIFY                                    |                 |              |
| _____   | 19              |              |
| _____   | 20              |              |
| _____   | 21              |              |
| IN-HOUSE  | 22              |              |
| DON'T KNOW  | 99-SKIP TO Q.29 |              |

28. b) Why? PROBE: Any other reasons?

_____	<u>16-17</u>
_____	
_____	<u>18-19</u>
_____	
_____	<u>20-21</u>
_____	

29. How much time does it take to obtain information from: READ SOURCES USED FROM Q.21 THEN SCALE, THEN ASK: Is this acceptable for making timely decisions?

	Immed/ Same Day	Within a wk	Within 2 wks	Within a mth	Within 2 mths	Within 3 mths	> than 3 mths	Don't Know	Acceptable?			
									Yes	No	DK	
(01) Embassies	1	2	3	4	5	6	7	8	1	2	3	(22-23)
(02) Library	1	2	3	4	5	6	7	8	1	2	3	(24-25)
(03) Consultants	1	2	3	4	5	6	7	8	1	2	3	(26-27)
(04) Banks/Credit Companies	1	2	3	4	5	6	7	8	1	2	3	(28-29)
Publications (Specify)												
(05) _____	1	2	3	4	5	6	7	8	1	2	3	(30-31)
(06) Other Countries	1	2	3	4	5	6	7	8	1	2	3	(32-33)
(07) Personal Con- tacts/Workd of Mouth	1	2	3	4	5	6	7	8	1	2	3	(34-35)
(08) Trade Shows	1	2	3	4	5	6	7	8	1	2	3	(36-37)
(09) Experts	1	2	3	4	5	6	7	8	1	2	3	(38-39)
(10) ISTC/DRIE	1	2	3	4	5	6	7	8	1	2	3	(40-41)
(11) Statistics Canada	1	2	3	4	5	6	7	8	1	2	3	(42-43)
(12) External Af- fairs Canada	1	2	3	4	5	6	7	8	1	2	3	(44-45)
Other Federal Govt Depart- ments (Specify)												
(13) _____	1	2	3	4	5	6	7	8	1	2	3	(46-47)
(14) _____	1	2	3	4	5	6	7	8	1	2	3	(48-49)
Provincial Govt Departments (Specify)												
(15) _____	1	2	3	4	5	6	7	8	1	2	3	(50-51)
(16) _____	1	2	3	4	5	6	7	8	1	2	3	(52-53)
Associations (Specify)												
(17) _____	1	2	3	4	5	6	7	8	1	2	3	(54-55)
(18) _____	1	2	3	4	5	6	7	8	1	2	3	(56-57)
Others (Specify)												
(19) _____	1	2	3	4	5	6	7	8	1	2	3	(58-59)
(20) _____	1	2	3	4	5	6	7	8	1	2	3	(60-61)
(21) _____	1	2	3	4	5	6	7	8	1	2	3	(62-63)
(22) In-House	1	2	3	4	5	6	7	8	1	2	3	(64-65)

SECTION 4: OTHER SOURCES

30. Are there any sources of product-specific market information which you know are available but which you have never used?

YES 1 (66)  
 NO 2-SKIP TO Q.33

31. What information sources are these, and what information is available from these sources? PROBE: Any others?

SOURCE	TYPE OF INFORMATION	
_____	_____	66-69
_____	_____	70-73
_____	_____	74-77
_____	_____	1-4

32. Why have you never used this information? PROBE: Any other reasons? DO NOT READ LIST?

NO NEED	01	5-6
TOO EXPENSIVE	02	7-8
TAKES TOO MUCH TIME TO OBTAIN	03	9-10
TOO MUCH WORK INVOLVED IN GETTING INFORMATION	04	11-12
DON'T KNOW HOW TO GET IT	05	13-14
NOT APPROPRIATE TO MY NEEDS	06	
OTHERS (SPECIFY)		
_____	07	
_____	08	
_____	09	
DON'T KNOW	99	

33. Are you aware of any databases which provide product-specific market information?

YES 1 (15)  
 NO 2-SKIP TO Q.39

34. What are these sources? PROBE: Any others? LIST SOURCES BELOW.
35. What type of information is available in this database? RECORD BELOW.
36. What are the costs associated with obtaining information from this database. RECORD BELOW.
37. How accessible is this information. Is it: READ LIST. RECORD BELOW.
1. Very accessible
  2. Accessible
  3. Inaccessible
  4. Very inaccessible
  5. DON'T KNOW
38. Based on what you know of this database, what is the quality of the information available? Is it: READ LIST. RECORD BELOW.
1. Very good
  2. Good
  3. Poor
  4. Very poor
  5. DON'T KNOW

	#1	#2	#3	#4	
34. Source					16-17 18-19 20-21 22-23
35. Type of information					24-25 26-27 28-29 30-31
36. Cost					(32-37 (38-43 (44-49 (50-55
37. Accessibility	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	(56-59
38. Quality	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	(60-63



SECTION 5: FUTURE NEEDS

39. Over the next three years, do you think your product-specific market information needs will remain the same or will your needs change?

REMAIN THE SAME

1-SKIP TO Q.41

(64)

CHANGE

2

40. How will your needs change? PROBE: Anything else?

---

---

---

---

---

---

---

---

65-66

67-68

69-70

71-72

41. How interested would you be in each of the following services for a product of interest to your firm? READ LIST OF ITEMS ON NEXT PAGE, THEN SCALE.

FOR EACH ITEM ANSWERED 1 OR 2 (very interested, interested) IN Q. 41 ON NEXT PAGE ASK:

42. In your opinion, would the federal department of industry be a reliable source for obtaining this information? RECORD ON NEXT PAGE. IF NO, ASK: Which source would be most reliable for this information? BE SPECIFIC. RECORD ON NEXT PAGE. ASK Q.43 IMMEDIATELY FOR EACH SOURCE.

43. Why is this source more reliable?

- |    |       |       |
|----|-------|-------|
| a) | _____ | 73-74 |
| b) | _____ | 75-76 |
| c) | _____ | 77-78 |
| d) | _____ | 79-80 |
| e) | _____ | 1-2   |
| f) | _____ | 3-4   |
| g) | _____ | 5-6   |
| h) | _____ | 7-8   |
| i) | _____ | 9-10  |
| j) | _____ | 11-12 |
| k) | _____ | 13-14 |
| l) | _____ | 15-16 |
| m) | _____ | 17-18 |

	Q41				Q42			Better Source (Specify)	
	Very Interested	Interested	Not at all Interested	Don't Know	ISTC Yes	No	DK		
a) detailed import data for this product for Canada and other countries	1	2	3	4	1	2	3	ASK Q.43	19-22
b) detailed production data for this product for Canada and other Countries	1	2	3	4	1	2	3	ASK Q.43	23-26
c) detailed export data for this product for Canada and other countries	1	2	3	4	1	2	3	ASK Q.43	27-30
d) information on trends, tariffs and non-tariffs barriers for this product	1	2	3	4	1	2	3	ASK Q.43	31-34
e) information on Canadian companies who import this product	1	2	3	4	1	2	3	ASK Q.43	35-38
f) information on foreign suppliers to Canada for this product	1	2	3	4	1	2	3	ASK Q.43	39-42
g) information on exports from the U.S. for this product	1	2	3	4	1	2	3	ASK Q.43	43-46
h) information on imports to the U.S. for this product	1	2	3	4	1	2	3	ASK Q.43	47-50
i) information on exports from the European Economic Community (EEC) for this product	1	2	3	4	1	2	3	ASK Q.43	51-54
j) information on imports to the EEC for this product	1	2	3	4	1	2	3	ASK Q.43	55-58
k) information on exports from other countries for this product (SPECIFY COUNTRIES)	1	2	3	4	1	2	3	ASK Q.43	59-60
l) information on imports to other countries for this product (SPECIFY COUNTRIES)	1	2	3	4	1	2	3	ASK Q.43	61-64
									65-66
									67-70
m) knowledge on what, and where, market information is available for this product	1	2	3	4	1	2	3	ASK Q.43	71-74

**SECTION 6: PROFILE**

44. Over the past 12 months, what has been the value in Canadian dollars, of your company's: READ LIST.

	\$	<u>DON'T KNOW</u>	<u>REFUSED</u>	
Sales	_____	98	99	(1-10)
Imports	_____	98	99	(11-20)
Exports	_____	98	99	(21-30)

45. DO NOT ASK BUT RECORD PROVINCE?

NEWFOUNDLAND	01	
PEI	02	
NOVA SCOTIA	03	
NEW BRUNSWICK	04	
QUEBEC	05	(31-32)
ONTARIO	06	
MANITOBA	07	
SASKATCHEWAN	08	
ALBERTA	09	
BC	10	
NWT	11	
YUKON	12	

46. What is your name and position or title within your organization?  
PLEASE BE SPECIFIC.

NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

**THANK & TERMINATE**

**ANNEX B**

**Associations and Publications  
Cited as Sources of Product-Specific  
Market Information**

ASSOCIATIONS CITED AS SOURCES OF PRODUCT-SPECIFIC  
MARKET INFORMATION

The following is a list of associations compiled from the survey questionnaires. After each association name, in parentheses, is the number of times that the association was mentioned by the respondents.

---

Allied Boating Association (4)  
AOCS (1)  
B.C. Fishing Association (1)  
B.C. Grocer Association (1)  
B.C. Software Association (1)  
C.C.C. (2)  
C.I.P.S. (1)  
C.R.G.I. (1)  
CAFE (2)  
Canadian Automotive Association (1)  
Canadian Battery Manufacturers' Association (2)  
Canadian Business Forms Association (3)  
Canadian Carpet Institute (1)  
Canadian Daily Newspaper Publishers Association (1)  
Canadian Independent Record Product (1)  
Canadian Manufacturers' Association (C.M.A.) (4)  
Canadian Meat Council (1)  
Canadian Printing Association (1)  
Canadian Pulp and Paper Association (1)

ASSOCIATIONS (cont.)

Canadian Recreational Vehicle Association (3)  
Canadian Standards Association (C.S.A.) (2)  
Canadian Textile Institute (3)  
Cash Register Association (1)  
CCTFA (1)  
Chef Association (1)  
Clay-Brick Association (2)  
COFI (1)  
Compressed Gas Association (1)  
Contractor's Assn. (Building) (1)  
Council of Forest Industries of B.C. (1)  
CPCA (1)  
CPIA (1)  
DPMA (1)  
Egg and Poultry Association (1)  
Electrical Association (2)  
Engineers Association (1)  
ERA (1)  
Fisheries Association (1)  
Fisheries Council of Canada (2)  
GAMA (1)  
Grocers Association (1)  
Hearing Instruments (1)  
I.P.C. (3)  
Industrial Fabrics Association International (1)  
Industries Association (7)  
Insulation Manufacturing Association (1)  
International Bottled Water Association (1)  
Juvenile Product Manufacturer's Association (1)  
Manitoba Fashion Institute (1)

ASSOCIATIONS (cont.)

Manufacturers of Western Boots (1)  
Manufacturing (3)  
MEMAC (1)  
Merchants Association (1)  
Milk Industry Association (1)  
MIS Marketing Group (1)  
National Association of Music (1)  
National Dairy Council (1)  
National Knitwear and Sportswear Association (1)  
National Marine Manufacturer Association (3)  
Newspaper Association (1)  
Ontario Concrete Pipe Association (2)  
PACE (1)  
Petroleum Association (Calgary) (1)  
Prairie Implement Manufacturer Association (2)  
Pre-Stressed Concrete Institute (1)  
Provincial Construction Association (1)  
Quebec Furniture Manufacturing Association (1)  
RAA (1)  
Ready-Mix Concrete Association (1)  
Recreational Vehicle (3)  
Restaurant Association (1)  
Seafood Producers Association of Nova Scotia (1)  
Society of Plastic Industry (1)  
Society of Plastics Engineers (1)  
Soft Drink and Brewery Association (1)  
Trade (A.I.A.) (3)  
Trade (A.P.A.A.) (2)  
Trade (A.S.I.A.) (2)  
Trade Association (7)



ASSOCIATIONS (cont.)

U.S. and Canada Concrete Reinforcing Steel Institute (2)

U.S. Petroleum (1)

U.S. Random Lengths (Oregon) (1)

Wild Blueberry Association (1)

**PUBLICATIONS CITED AS SOURCES OF PRODUCT-SPECIFIC  
MARKET INFORMATION**

The following is a list of publications compiled from the survey questionnaires. After each publication name, in parentheses, is the number of times that the publication was mentioned by the respondents.

---

American Printer (1)  
Automotive magazines (2)  
Automotive News (2)  
Aviation and Space Technology (2)  
B.C. Sub Sea Directory (2)  
B.O.S.S. (2)  
Bi-Weekly U.S. (1)  
Bobin Magazine (1)  
Boston Blue Sheet (1)  
Box Board Containers (1)  
Brochures (1)  
Business Trend Analyst (1)  
Canadian Business Magazine (1)  
Canadian Construction (1)  
Canadian Forest Products (2)  
Canadian Packaging (1)  
Canadian Printer (1)  
Canadian Society of Non-Destructive Testing (2)  
Catalogues (2)  
Commerce Business Daily (2)  
Commercial News (1)  
Commercial Publications (1)

**PUBLICATIONS (cont.)**

Consulting Publications (1)  
Customer information - published by the company (1)  
CWE (1)  
Daily Commercial News (1)  
Electronic News (1)  
Electronic Times (1)  
European Publications (1)  
Export publications (1)  
Financial Post (3)  
Financial Publications (1)  
Financial Times (1)  
Fluid Power Directory (1)  
Foreign Government Magazines (1)  
Foreign Trade Publications (2)  
Forestry (1)  
Fraser (2)  
Furniture (1)  
Government Publications (2)  
Graphic Arts Production (1)  
H.R. / P.C. (1)  
Industrial and Commercial (3)  
Industry Magazine (2)  
International Product Alert (1)  
Journals (1)  
Journal of Commerce (3)  
Kurt Salomon Annual Survey (1)  
Magazines (10)  
Marine Industry Trade Journal (2)  
Market Opportunities Catalogue - U.S. (1)  
Marketing Magazine (1)

**PUBLICATIONS (cont.)**

Medical Literature (1)  
Modern Machine Shop (2)  
Modern Plastic (1)  
Modern Railroads (2)  
National Advertising Magazines (1)  
National Fisherman (2)  
Newsletters and Journals (7)  
Newspapers (8)  
Oil Week (1)  
Pacific Fishing (2)  
Paper Board Packaging (1)  
Periodicals (2)  
Plastics Suppliers (1)  
Private Building (1)  
Progressive Railroading (2)  
Provincial Government Publications (1)  
Publications on other countries (1)  
Pulp and Paper Magazines (2)  
R.V. Magazines (3)  
Racing Magazine (1)  
Railway Age (2)  
Railway Gazette (2)  
Red Book (2)  
Report on Marketing for Textiles and Clothing (1)  
Reports from U.S.A. (2)  
Restaurant publications (2)  
Scott Register (Canada) (5)  
Screen Print, Signs of the Times (1)  
Specialized Magazines (5)  
Sun & Province (Newspapers) (1)

**PUBLICATIONS (cont.)**

Suppliers Catalogue (2)  
Technical Publications (3)  
Textile Clothing (1)  
Thomas Registers (4)  
Trade Publications (58)  
Truck and Trailer Builder Construction News (2)  
Truck News (1)  
U.S. Furniture Today (1)  
Wards Automotive (2)  
West Coast Mariner (2)  
West Coast Fisherman (2)  
Western Producer (2)  
Wholesale (2)  
Women's Wear Daily (1)





INDUSTRY CANADA/INDUSTRIE CANADA



68429