Global Affairs Canada
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2022 Trade Commissioner Service Client Satisfaction Research

Final Report

Prepared for Global Affairs Canada

Supplier: EKOS RESEARCH ASSOCIATES INC.
Contract Number: CW2240167
Contract Value: $126,791.65 (including HST)
Award Date: September 13, 2022
Delivery Date: March 7, 2023

Registration Number: POR 039-22
For more information on this report, please contact Public Opinion Research at POR-ROP@international.gc.ca

Ce rapport est aussi disponible en français

Government of Canada Gouvernement du Canada

Canada

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Cette publication est aussi disponible en français sous le titre : Étude sur la satisfaction des clients du Service des délégués commerciaux du Canada 2022.

Catalogue Number: FR5-160/2022E-PDF

International Standard Book Number (ISBN): 978-0-660-47889-0

Related publications (registration number**:** 039-22)

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SUMMARY

A. BACKGROUND AND OBJECTIVES

The Trade Commissioner Service (TCS) is a service offered by Global Affairs Canada (GAC) that provides expert advice and support to Canadian businesses on matters related to exploring and growing opportunities in foreign markets, improving access to foreign markets, attracting foreign investment, Canadian Direct Investment Abroad, and innovation. With offices across Canada and its presence in more than 160 cities worldwide, the TCS helps thousands of businesses each year. The Trade Commissioner Service also works with partner organizations such as provincial and municipal governments and industry associations that deliver programs and services to Canadian businesses.

The TCS commissioned EKOS Research Associates to conduct quantitative and qualitative research among its clients. The research was designed to gauge client satisfaction with the TCS and more clearly understand the types of services and information provide by the TCS that clients value.

B. METHODOLOGY

Two phases of research were conducted to deliver on the objectives: an initial quantitative phase in which a client satisfaction survey was sent to 2,978 TCS clients, followed by a qualitative phase that involved interviews with 41 key informant interviews survey respondents. The population of TCS clients includes all Canadian companies that sought the services of a Trade Commissioner in Canada or abroad between August 2020 and July 2022 to support their international business development.

Survey

The survey research involved a sample of n=2978 clients of the TCS who were identified through a contact list maintained by the TCS. The survey required an average of 15 minutes to complete and was conducted between November 24 and December 16, 2022. A response rate of 13% was obtained from the initial sample of 26,718. See Appendix A for details related to methodology, response rate calculation and potential for response bias. A margin of error is not applicable since a census of all members of the population was attempted.

Interviews

The qualitative research consisted of one-on-one interviews with 41 survey respondents between December 10, 2020 and February 1, 2023, with five completed in French. Each interview took between 30 and 45 minutes to complete. The questions included in the interview guide were primarily open-ended in nature in order to have the participants clarify key study issues in their own words and drawing on their experiences with the TCS.

It is important for readers to note that interview participants were purposely selected from the sample of respondents to over represent those indicating a lower level of satisfaction with the TCS in order to better understand the nature of dissatisfaction. It is therefore not intended to be a representative balance of the extent of satisfaction or dissatisfaction found in the population of TCS clients.

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

C. KEY FINDINGS

Key findings from the Survey Research

Consistent with past research in 2013 and 2019, the findings of this year's survey research show that a very high proportion of clients are happy with the service and information they have received. Specifically, the results find that:

- at least four in five clients (81%) are satisfied with the service and advice provided by the TCS compared with 80% in 2019 and 83% in 2013
- 82% would definitely or probably recommend the TCS to a colleague compared with 83% in 2019 and 86% in 2013
- 85% would definitely or probably use the services of the TCS again compared with 85% in 2019 and 86% in 2013

Only 5% of respondents or fewer describe themselves as dissatisfied or say they are unlikely to recommend the TCS or use its services in the future. The primary reasons noted are insufficient value gained and quality of the service provided.

Aspects of the Client Experience

The core aspects of service that clients most often associate with the TCS are:

- consistent quality of service (78%)
- receiving appropriate contacts (i.e., the right people to do business with) (78%)
- useful intelligence on market conditions from the TCS (73%)

Positive views about the appropriateness of the contacts provided has increased significantly since 69% in 2019.

Two in three clients (69%) say the TCS provided them with intelligence that helped address problems, up from 62% in 2019.

Reasons for Contacting the TCS

About four in five clients say they need a great deal or at least some assistance with information on local companies or organizations (84%), market intelligence (82%), and referrals to international business opportunities or sales leads (79%). Other areas where most clients say they need assistance include:

- recommendations on trade fairs or trade missions (74%)
- help with understanding responsible business practices abroad (64%)
- referrals to relevant programs and services available to their business (62%)
- locating financing (is an area of need identified by 56%)

Half of clients or fewer say they need a great deal or some assistance with advice on planning a trip (52%), referrals to professional service providers (50%), support on intellectual property (IP) rights and dealings with local governments (50%), and referrals to technology or R&D-related partnerships (50%). Although most areas of need are in line with 2019 results, the proportion of clients needing assistance and information on locating financial assistance increased to 56% from 45% in 2019.

Client Outcomes

Other areas of TCS assistance frequently noted are related to exporting goods (35%) and services (28%), as well as with revenue-generating partnerships or joint ventures (27%), up from 22% in 2019.

Clients most often note that assistance provided by the TCS has given them access to market information they would not have otherwise had (63%) and enabled them to expand or explore markets (62%). Only slightly fewer (59%) say it provided them with contacts they would not have otherwise had and improved their knowledge of the competitive environment (56%). Respondents reported that marketing strategy (47%) and profile and credibility (46%) also improved with assistance from the TCS, along with the ability to overcome or avoid barriers to business opportunities (46%).

The most significant TCS contributions noted related to assistance with removing a trade barrier (53%), revenue-generating partnerships (46%) and foreign affiliate sales (43%). Each of these are up from 2019 levels, particularly removal of a barrier (44% in 2019). Significant contributions are also reported with regard to assistance with exporting of services (39%) and of goods (38%), along with the contribution made by assistance with attracting angel investors (36%), licensing of technology (36%), and investment abroad leading to revenue generation (35%). The TCS performance in all of these areas was judged to be much higher than in 2019.

Obstacles and Challenges Related to Export Activities

Significant obstacles to doing business in international markets that were noted by about half of clients are a lack of market contacts (57%), uncertainty of the regulatory environment in other countries (53%), lack of information about international business opportunities (52%), and a lack of access to financing (56%).

Administrative obstacles outside of Canada are a moderate to major challenge in relation to their organization's exporting activities, according to 53% of clients. Similar to 2019, about half of clients indicate that lack of financing or inadequate cash flow (51%) or financial risk (50%) is a challenge. Less than half cite logistical obstacles (45%), market knowledge issues (44%), or foreign border obstacles (43%); the latter two are reported as an obstacle by slightly fewer clients than in 2019. About one in three clients say that intellectual property issues in Canada (34%) or administrative obstacles in Canada (32%) are a challenge; both have also decreased marginally as a challenge from what clients reported in 2019. Among the challenges identified, Canadian border obstacles are a challenge for fewer (28%) clients.

Market Diversification

Two in three clients (65%) say they export goods and services to the United States and to other foreign markets. An additional one in six (16%) say they export goods and services to foreign markets other than the United States. Only 7% export exclusively to the United States. As in 2019, two in three respondents (66%) identify the United States as first among their three largest export markets, followed by the United Kingdom and China at a distant 21% and 19%, respectively. France (11%), Germany (10%), Mexico (10%), India (9.5%), Japan (9%) and Australia (9%) are all top three markets for roughly one in ten clients.

On a regional basis, the United States is again reported as the largest export market for the greatest number of clients (67%), followed by Western Europe (44%) and East/Southeast Asia (36%). Latin America is the fourth largest region (26%). The United States is most often (53%) identified as the fastest-growing export market over the next three years followed by Western Europe (37%) and East/Southeast Asia (36%).

Key findings from *the In-Depth Interview Research*

Interactions with the TCS

Above all, TCS clients want support to identify contacts to conduct business internationally, including potential buyers or customers. A few said they look to the TCS for assistance in connecting with these contacts or providing an introduction, along with vetting potential contacts to ensure they are legitimate buyers. Some participants approached the TCS for market intelligence, information about the local business culture or barriers in conducting business in a market. A few participants sought information on regulations in a market. Finally, a few requested help identifying sources of funding and financial assistance.

Participants felt that help understanding the business culture in a target country was the most helpful element of their interaction with the TCS, along with the provision of contacts and the ability of the TCS to make connections and support introductions. Some said that the service was most helpful once they had an established relationship with a Trade Commissioner, or the Trade Commissioner offered strategic advice and follow-up.

Participants offered several areas for improvement, including improving consistency of assistance, responsiveness, and clarifying the priority areas (business size or sector) that the TCS supports. Related to responsiveness, only some said they would consider reaching out to the TCS in a crisis situation. Some felt that information the TCS provided was too general and not specific to their needs. Other gaps include a desire for more guidance to identify sources of funding, or more of the general information provided online.

Other Organizations

Most participants were aware of other organizations that offer comparable information or services as those offered by the TCS. Most often, other federal organizations such as EDC or

BDC were mentioned, along with a few mentions of NRC, IRAP, or Statistics Canada. Participants were aware of private sector professionals such as lawyers, financial consultants, brokers, and banks. Provincial trade-focused organizations, federal government support from other markets, professional networks and associations were also mentioned.

Many have used the services or accessed information from at least one of these other organizations. A few noted that other private organizations are expensive; however, they provide more responsive or specialized information. What makes the TCS unique, according to participants, is the extensive presence of the TCS in other markets, market landscape understanding, and the weight of the federal government in making introductions.

Branding

The TCS conjures images of an ambassador or facilitator, and has the ability to make connections for Canadian businesses. For those who are satisfied with the TCS, descriptive words such as “knowledgeable”, “insightful”, “professional”, or “trustworthy” come to mind.

The name of the Trade Commissioner Service itself was straightforward, according to some participants, or they felt that they were used to the name or the naming is unimportant. Particularly, “trade” implies the mandate of the organization, to facilitate trade, although a few said that “export” might be better or they are not in the business of “trade”. The term “commissioner” was seen as bureaucratic or government-speak, although a few pointed out that the service is provided by a Trade Commissioner.

TCS Staff

Many participants, notably those who were satisfied with the TCS overall, considered the TCS staff to be professional, asking questions to develop knowledge of their business or sector. Some explained that although staff may be polite and willing to help, the processes themselves were slow or bureaucratic. A few participants noted a consistent turnover of “transient” staff.

Business Challenges During the COVID-19 Pandemic

Most notably, restrictions due to the COVID-19 pandemic resulted in business development challenges. Participants reported they were unable to travel to different markets to attend trade shows or meet with current or potential customers. Sales decreased for some due to changes in consumer behaviour, restrictions, or general uncertainty. Supply chain challenges were experienced by those with tangible products. Increased labour costs were a challenge, along with the ability to attract and retain labour.

Participants implemented various mitigation strategies throughout the pandemic, such as the transition to remote work environments. Others adapted their business model to enhance an online sales strategy, found other business ventures or products that would be profitable during the pandemic, or changed their purchasing model or suppliers.

Although a few businesses indicate they were unaffected by or increased revenue during the pandemic, only a few participants who said they experienced notable challenges indicate that they have fully recovered. Some anticipate continued challenges as they endeavour to recover, with a few small businesses stating they have taken on more debt and may not recover.

Anticipated Challenges

Many challenges are expected by participants over the next five years. Among them are an economic downturn, inflation, higher interest rates, and currency instability. Sourcing capital and financial support is an expected challenge for some, with a few continuing to experience cash flow difficulties due to the pandemic. Supply chain challenges are expected to persist, disrupting manufacturing, delivery delays, and increased cost. Labour shortages are expected to continue, along with the associated increased costs and loss of productivity. A few do not anticipate resuming business travel to the same level as before the pandemic due to increased costs, travel disruption, and lack of efficiency in meetings.

Use of the TCS in the Future

The TCS is considered an important resource for information and service to support international business activities; many inteview participants indicate they intend to continue to seek support from the TCS. Some described the need for more fulsome support to enter a new market, such as an overview of market intelligence, regulatory considerations, cultural knowledge, along with contacts and introductions. A few anticipate seeking support from specific services such as trade missions, funding, or help vetting identified organizations.

D. NOTE TO READERS

Survey

Detailed findings are presented in the sections that follow. Overall survey results are presented in the main portion of the narrative and are typically supported by graphic or tabular presentation of results. Statistically and substantively significant differences between sub-groups of respondents are provided in tables or bulleted text below the main chart or table. If differences are not noted in the report, it can be assumed that they are either not statistically significant[1] in their variation from the overall result or that the difference was deemed to be substantively too small to be noteworthy. Results may not total 100% due to rounding. Similarly, some totals of percentages for two responses may not appear correct due to rounding. The programmed survey instrument can be found in Appendix B.

Interviews

As per section 10.2.3 of Public Services and Procurement 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."[2] 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%;
> "Some participants" = 25 to 49%;
> "Many participants" = 50 to 75%; and,
> "Most participants" = over 75%.

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[1] Chi-square and standard t-tests were applied as applicable. Differences noted were significant at the 95% level.

[2] 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, perceptions and information provided by Canadian business representatives. Appendix C provides the recruitment invitation, and Appendix D provides the interview guide.

E. CONTRACT VALUE

The contract value for the POR project is $126,791.65 (including HST).

F. POLITICAL NEUTRALITY CERTIFICATION

I hereby certify as Senior Officer of EKOS Research Associates Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the 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:

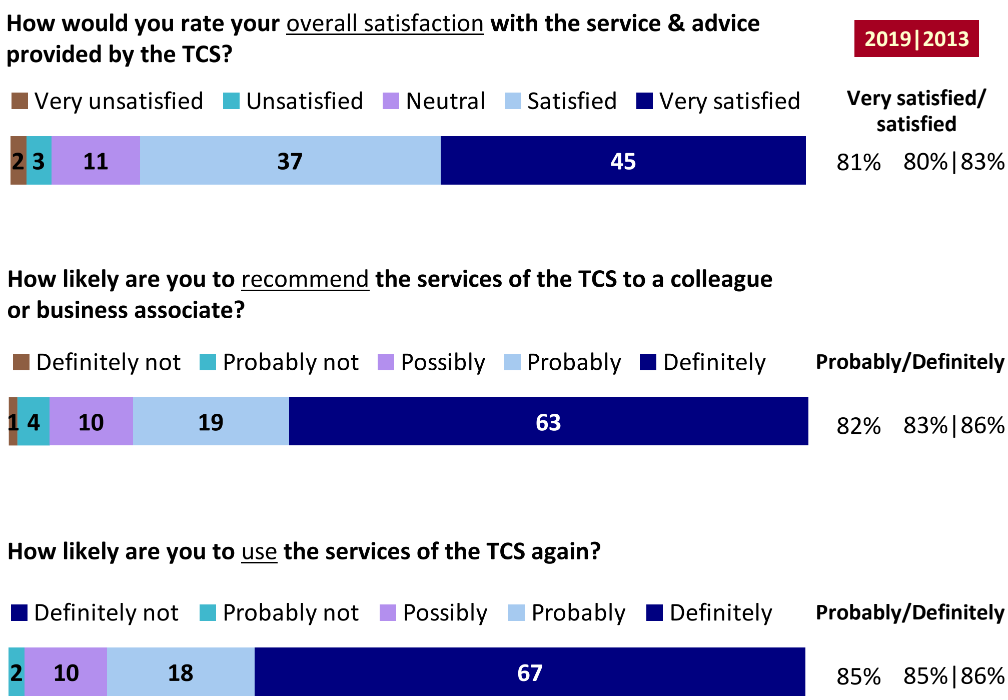
Susan Galley (Vice President)

Detailed Survey Findings

A. TCS Client Satisfaction

Four in five clients (81%) describe themselves as either very satisfied (45%) or satisfied (37%) with the service and advice provided by the TCS. Similarly, 82% say they would definitely (63%), or probably (19%) recommend the TCS to a colleague, and 85% would definitely (67%) or probably (18%) use the services of the TCS in the future. In each case, 5% or fewer clients describe themselves as dissatisfied or unlikely to recommend or use the services of the TCS in the future. These findings have remained stable since 2013.

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



Base: All respondents (n=2978)

Table 1: Variation in client satisfaction

Year	n=	Dissatisfied (1-2)	Satisfied (4-5)
2022	2,978	5%	82%
2019	2,965	4%	80%
2013	1,222	6%	83%
2009	1,449	13%	66%

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

- partner Institutions (91%)
- large organizations (86%)
- clients in the Atlantic provinces (87%)
- those receiving a service in 2022 (84%)

The following 4 tables break these results down further.

Table 1a: Rated satisfaction with the service and advice provided – Service Type

Service type	n=	Dissatisfied (1-2)	Satisfied (4-5)
Problem solving	195	6%	82%
Qualified contacts	1,244	5%	81%
Market potential	667	5%	83%
Preparing for international markets	607	4%	80%
Additional service	265	5%	82%

Table 1b: Rated satisfaction with the service and advice provided – Canadian Region

Canadian region	n=	Dissatisfied (1-2)	Satisfied (4-5)
B.C.	529	5%	82%
Alberta	352	5%	78%
Manitoba/Saskatchewan	183	3%	**75%**
Ontario	1,014	6%	81%
Quebec	530	5%	82%
Atlantic provinces	235	3%	**87%**

Table 1c: Rated satisfaction with the service and advice provided – Organization Size

Organization Type	n=	Dissatisfied (1-2)	Satisfied (4-5)
SMEs	2,365	6%	80%
Large	350	3%	**86%**
Partner	234	3%	**91%**

Table 1d: Rated satisfaction with the service and advice provided – Largest Market Region (Based on $ Value)

Largest Market Region	n=	Dissatisfied (1-2)	Satisfied (4-5)
North America	1,304	6%	80%
Latin America & Caribbean	499	5%	84%
Western & Eastern Europe	901	5%	81%
Africa & Middle East	487	7%	81%
South & East Asia	827	5%	83%
Oceania	205	7%	**76%**

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

- partner Institutions (91%), and large organizations (87%)
- clients based in the Atlantic provinces (88%)
- clients receiving services in 2022 (85%)

Table 2: Variation in Willingness to Recommend

Year	n=	Definitely/ Probably Not (1-2)	Definitely/ Probably (4-5)
2022	2,978	5%	82%
2019	2,965	4%	82%
2013	1,222	5%	86%
2009	1,449	8%	76%

The following 4 tables break these results down further.

Table 2a: Likelihood of recommending services of the TCS – Service Type

Service Type	n=	Definitely/ Probably Not (1-2)	Definitely/ Probably (4-5)
Problem solving	195	6%	79%
Qualified contacts	1,244	4%	82%
Market potential	667	6%	85%
Preparing for international markets	607	5%	80%
Additional service	265	4%	83%

Table 2b Likelihood of recommending services of the TCS – Canadian Region

Canadian Region	n=	Definitely/ Probably Not (1-2)	Definitely/ Probably (4-5)
B.C.	529	5%	81%
Alberta	352	6%	**78%**
Manitoba/Saskatchewan	183	4%	82%
Ontario	1,014	6%	82%
Quebec	530	5%	82%
Atlantic provinces	235	2%	**88%**

Table 2c: Likelihood of recommending services of the TCS – Size of Organization

Organization Type	n=	Definitely/ Probably Not (1-2)	Definitely/ Probably (4-5)
SME	2,365	5%	81%
Large	350	3%	87%
Partner	234	1%	91%

Table 2d: Likelihood of recommending services of the TCS – Largest Market Region (Based on $ Value)

Largest Market Region	n=	Definitely/ Probably Not (1-2)	Definitely/ Probably (4-5)
North America	1,304	5%	81%
Latin America & Caribbean	499	5%	85%
Western & Eastern Europe	901	5%	81%
Africa & Middle East	487	6%	80%
South & East Asia	827	4%	82%
Oceania	205	7%	79%

Table 3: Variation in Likelihood of Using Services Again

Year	n=	Definitely/ Probably Not (1-2)	Definitely/ Probably (4-5)
2022	2,978	3%	85%
2019	2,965	2%	85%
2013	1,222	3%	86%
2009	1,449	5%	81%

Partner institutions are more likely than other client organizations to say they would use the services of the TCS in future.

The following tables break down these results across subgroups.

Table 3a: Likelihood of using the services of the TCS in future – Service Type

Service Type	n=	Definitely/ Probably Not (1-2)	Definitely/ Probably (4-5)
Problem solving	195	3%	87%
Qualified contacts	1244	3%	85%
Market potential	667	4%	86%
Preparing for international markets	607	2%	83%
Additional service	265	2%	86%

Table 3b: Likelihood of using the services of the TCS in future – Canadian Region

Canadian Region	n=	Definitely/ Probably Not (1-2)	Definitely/ Probably (4-5)
B.C.	529	3%	85%
Alberta	352	3%	82%
Manitoba/Saskatchewan	183	4%	85%
Ontario	1,014	3%	85%
Quebec	530	3%	83%
Atlantic provinces	235	2%	87%

Table 3c: Likelihood of using the services of the TCS in future – Organization Size

Organization Type	n=	Definitely/ Probably Not (1-2)	Definitely/ Probably (4-5)
SME	2,365	3%	84%
Large	350	0%	88%
Partner	234	2%	**92%**

Table 3d: Likelihood of using the services of the TCS in future – Largest Market Region (Based on $ Value)

Largest Market Region	n=	Definitely/ Probably Not (1-2)	Definitely/ Probably (4-5)
North America	1,304	3%	84%
Latin America & Caribbean	499	3%	87%
Western & Eastern Europe	901	3%	84%
Africa & Middle East	487	3%	85%
South & East Asia	827	2%	86%
Oceania	205	4%	83%

Table 3e: Likelihood of using the services of the TCS in future – Sector

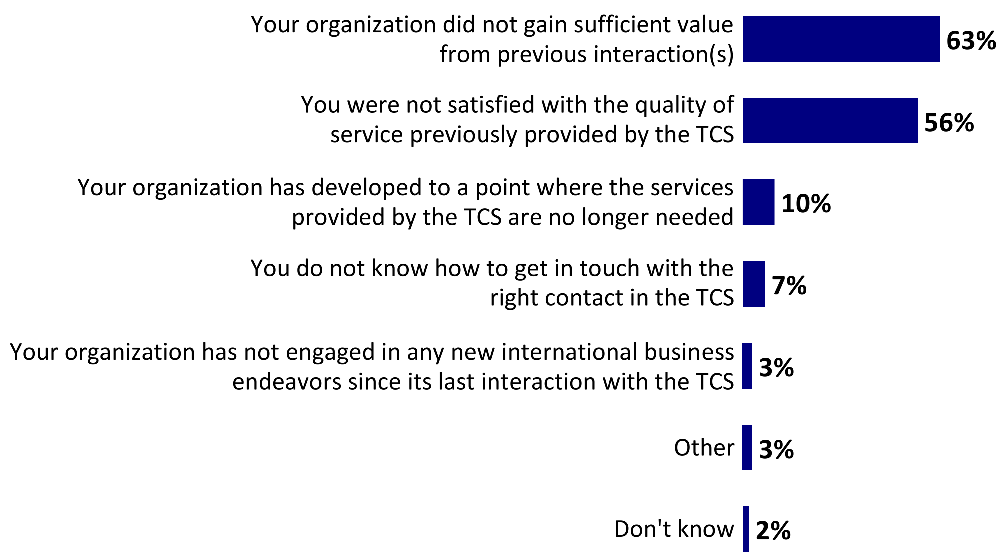
Sector	n=	Definitely/ Probably Not (1-2)	Definitely/ Probably (4-5)
Agriculture & Processed Foods[3]	422	3%	85%
Government/NGO	98	3%	90%
Defence/Aerospace	194	3%	86%
Responsive sector [4]	469	4%	**79%**
Arts & cultural Industries	143	3%	83%
Cleantech	267	2%	87%
Information & Communications Technology	451	4%	83%
Infrastructure/Building Prod & Serv.	156	3%	85%
Life Sciences	250	1%	**90%**
Mining	100	4%	84%
Oil & Gas	101	6%	82%

3 Includes fish and seafood.

4 Includes Chemicals, Plastics and Rubber, Consumer Products, Financial Services, Forestry and Wood Products, Industrial Machinery, Ocean Technologies, Professional Services, and Transportation.

The 2% who would probably not or definitely not use the services of the TCS in the future were most likely to say this was because of insufficient gain from previous interactions (63%) or they were not satisfied with the quality of the service provided (56%). Note: the small sample size of 86 client representatives for this question makes results imprecise.

Chart 2: Reasons for Dissatisfaction



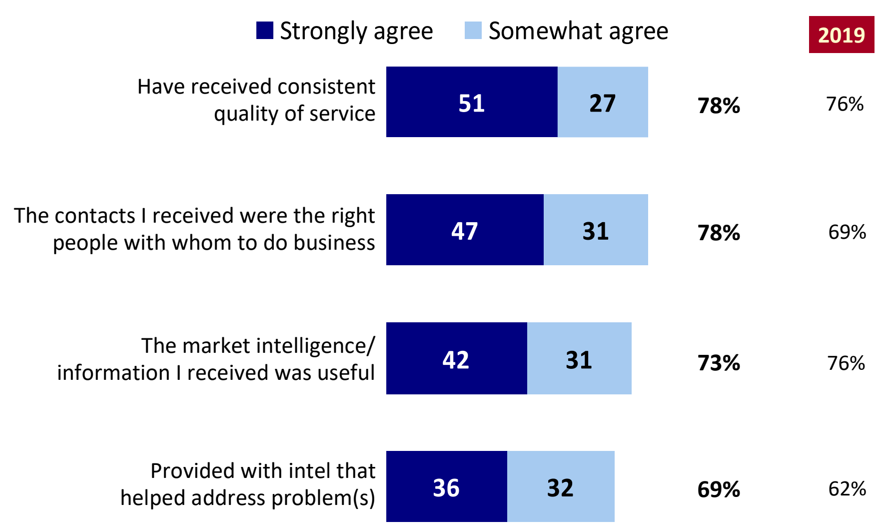
QD4. Which of the following best describes why you may be unlikely to use the services of the TCS in the future?
Base: All respondents (n=86)

B. Factors Contributing to Client Satisfaction

Clients were asked whether they agree or disagree with four statements about some aspects of the service provided by the TCS. Close to eight in ten agree that the TCS provided a consistent quality of service (78%) and that the TCS provided contacts to the right people with whom to do business (78%). Slightly fewer (73%) say they obtained useful intelligence on market conditions. Between 10% and 12% provided a neutral response (not shown in chart). Another 6% to 8% said they disagree with these statements. Results are similar to those found in 2019 with regard to consistency of quality and market information that is useful, although receiving the right contacts is rated more positively than in 2019 (69%).

Just over two in three (69%) clients say the TCS provided them with the information and advice that helped them address the problem(s), although 7% disagree and 16% provided a neutral response. Results are marginally more positive than those in 2019 (62%).

Chart 3: Aspects of the Client Experience with the TCS



B1A-D. Please indicate whether you agree or disagree with each of the following statements pertaining to the service you have received from the TCS.
Base: All respondents (n=2978)

The following tables outline the significant differences in agreement among the major demographic subgroups. Partner organizations and large businesses (500 employees or more) are more likely than others to be positive about their experience. Clients in the Atlantic provinces are also more positive with regard to consistency of service and usefulness of the information.

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

Table 4a: Consistent quality of service from all offices and agents (78%)

More likely than average	Less likely than average
Atlantic provinces (85%)	--

Base: All respondents (n=2433; deal with more than one office or agents) / % strongly/somewhat agree

Table 4b: Contacts were the right people (78%)

More likely than average	Less likely than average
Partner institutions (84%)	Alberta (72%)
Large organizations (82%)	Planning to export (73%)
Service in 2022 (81%)	--
Education sector (82%)	Responsive sectors (71%)
Target market - East/South Asia (81%)	--

Base: All respondents (n=2965) / % strongly/somewhat agree

Table 4c: Market intelligence was useful (73%)

More likely than average	Less likely than average
Atlantic provinces (81%)	Problem solving (65%) Additional service (68%)
Partner institutions (80%)	Alberta (68%); Quebec (69%)
Large organizations (79%)	--
Education (81%) Cleantech (79%)	Responsive sectors (67%) , IT (67%)
Target market - South/East Asia (76%)	--
Exporting for 10+ years (76%)	--

Base: All respondents (n=2978) / % strongly/somewhat agree

Table 4d: Information & advice helped address the problem (69%)

More likely than average	Less likely than average
Partner institutions (77%)	TCS service - Prepare for international markets (64%)
Large organizations (74%)	SMEs (67%), under 10 employees (66%)
Education (77%)	Arts & Cultural Industries (59%) Responsive sectors (63%)
Service in 2022 (72%)	--

Base: All respondents (n=2978) / % strongly/somewhat agree

C. NEED FOR ASSISTANCE

Clients were asked to describe the areas of assistance needed when developing business in markets outside of Canada. About four in five clients indicated their need for a great deal or at least some assistance with information on local companies or organizations of note (84%, an increase from prior surveys), market intelligence (82%, on par with 2019), and referrals to international business opportunities or sales leads (79%).

A second tier of priorities identified by at least six in ten clients as areas where they need a great deal or at least some assistance include recommendations on trade fairs or trade missions (74%) and help understanding responsible business practices abroad (64%). Satisfaction in both areas was similar to 2019 results.

In a third tier, just over half of clients say they need a great deal or some assistance with information on locating financial assistance (56%, an increase from 47% in 2019). Similar to 2019 results, about half report needing practical advice on planning a trip (52%), referrals to professional service providers (50%), referrals to technology or R&D-related partnerships (50%) or support on intellectual property (IP) rights and dealings with local governments (50%).

With the exception of support for intellectual property rights, government procurement and/or regulation, significantly greater proportions of clients said they need assistance than in 2013 or 2009. This pattern was also found in 2019. The only exception where the need for assistance did not vary over time is in obtaining support on IP rights and government regulations. In other area tested where the wording was comparable, clients are considerably more likely to say they need assistance compared to previous research in 2013, and 2009 where applicable.

Chart 4: Priority Areas of Need among TCS Clients

QC1A-J. How much assistance does your organization need in the following areas when developing business in markets outside of Canada?
Base: All respondents (n=2978)

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

Table 5: Demographic Differences in Priority Areas of Need

Table 5a: Information about organizations or companies in foreign markets (84%)

More likely to need assistance	Less likely to need assistance
--	TCS service - Problem solving (72%)
Cleantech (88%)	Mining (73%)

Base: All respondents (n=2978) / % some/a great deal

Table 5b: Market intelligence and information on local organizations (82%)

More likely to need assistance	Less likely to need assistance
Atlantic provinces (90%)	TCS service - Problem solving (73%)
Planning to export (88%)	--
Education (89%) Life Sciences (87%)	Mining (73%)

Base: All respondents (n=2978) / % some/a great deal

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

More likely to need assistance	Less likely to need assistance
SMEs (82%)	TCS service - Problem solving (64%)
Cleantech (86%) Agriculture & Processed Foods (84%) Information & Communications Technology (83%)	Mining (55%) Education (70%)
Planning to export (86%)	--
Visible minority owned (88%)	--

Base: All respondents (n=2978) / % some/a great deal

Table 5d: Recommendations on trade fairs/ trade missions to attend (74%)

More likely to need assistance	Less likely to need assistance
Atlantic provinces (82%)	Large organizations (67%)
TCS service – Market potential assessment (78%)	TCS service - Problem solving (59%)
Visible minority owned (83%)	Conducting international business for over 10 years (70%)

Base: All respondents (n=2978) / % some/a great deal

Table 5e: Understanding responsible business practices in foreign markets (64%)

More likely to need assistance	Less likely to need assistance
Atlantic provinces (74%)	Large organizations (59%)
Agriculture & Processed Foods (69%)	--
Visible minority owned (73%)	--
Planning to export (72%)	--

Base: All respondents (n=2978) / % some/a great deal

Table 5f: Information or advice on locating financial/funding assistance (56%)

More likely to need assistance	Less likely to need assistance
SMEs (60%)	Conducting international business for over 10 years (45%)
Arts & Cultural Industries (79%) Cleantech (66%) Information & Communications Technology, Life Sciences (63%)	Education (30%)
Women owned (72%)F	--
Visible minority owned (71%)	--
TCS service - Prep for international markets (64%)	--

Base: All respondents (n=2978) / % some/a great deal

Table 5g: Practical advice on timing and organizing your business trip (52%)

More likely to need assistance	Less likely to need assistance
Atlantic provinces (64%)	Regularly conducting business in foreign markets (49%)
Partner organizations (62%)	--
Education (66%)	Mining (43%)
Women owned (57%)	--
Visible minority owned (68%)	--

Base: All respondents (n=2978) / % some/a great deal

Table 5h: Referrals to legal professionals, human resource professionals, translators and other professional service providers (51%)

More likely to need assistance	Less likely to need assistance
Alberta (57%)	Partner organization (40%)
	Government/NGO (40%) Education (44%)
Women owned (56%)	Conducting international business for over 10 years (44%)
Visible minority owned (60%)	--
Planning to export (61%)	--

Base: All respondents (n=2978) / % some/a great deal

Table 5i: Support for the protection of intellectual property rights, government procurement and/or regulatory matters (50%)

More likely to need assistance	Less likely to need assistance
Planning to export (64%)	Large organizations (40%)
Cleantech, Information & Communications Technology (55%)	Education (34%)
Women owned (57%)	Conducting international business for over 10 years (43%)
Visible minority owned (57%)	--

Base: All respondents (n=2978) / % some/a great deal

Table 5j: Referral of technology and/or R&D partnership opportunities (50%)

More likely to need assistance	Less likely to need assistance
Alberta (57%)	TCS service - Problem Solving (39%)
TCS service – market potential assessment (55%)	British Columbia (44%)
Life Sciences (67%) Cleantech (59%) Information & Communications Technology (58%)	Agriculture & Processed Foods (39%) Education (44%)
Visible minority owned (62%)	Conducting international business for over 10 years (44%)
Planning to export (65%)	

Base: All respondents (n=2978) / % some/a great deal

D. Client Outcomes

Clients most often report that the TCS provided assistance with exporting goods (35%) or services (28%) or in the development of a revenue-generating partnership or joint venture (27%). Beyond these three major types of activities, fewer than one in ten clients say they received other assistance from the TCS. Just over one in ten (12%) say they have not received assistance or do not know what these services are (3%).

Chart 5: Activities in Markets where the TCS Provided Assistance

QE2. For which of the following activities in foreign markets has your organization received assistance from the TCS?
Base: All respondents (n=2978)
Only items with 4% or more shown.

- Assistance with exporting goods is more often reported by clients located in the Prairie provinces (47%), the Atlantic provinces (42%) and Quebec (41%), as well as among those requesting assistance with problem solving (43%). It is most prominent in the agriculture and processed foods (67%) and defence/aerospace sectors (50%).

- Assistance with exporting services is more often needed among clients in Ontario (31%) and among organizations with five years or less conducting business internationally (35%), as well as in the information & communications technology sector (45%).
- Assistance with finding partners/investors is more commonly needed among partner institutions (37%), in the education sector (45%), and among clients receiving market potential assessment information (32%).
- Those reporting that they did not receive service are most often in the planning stages (17%), which is also more prevalent in the Prairie provinces (19%) and Alberta (17%). It is highest among those dissatisfied with the services of the TCS (39%).

When asked whether the TCS assistance resulted in one of a number of outcomes, six in ten say that the TCS assistance enabled them to explore or expand in a foreign market (63%) and provided intelligence and information they could not have received elsewhere (62%). Slightly fewer say that the TCS assistance provided them with contacts they would not have otherwise found (59%), improved their knowledge about the competitive environment in a market (56%) or gave them market information that supported decision making (54%). Each of these results is on par with 2019 findings, although a slightly higher proportion (63%) note needing assistance with exploration or expansion into a foreign market compared with 58% in 2019.

Just under half of clients say that the TCS assistance enabled them to improve their marketing strategy (47%) or their organizations' profile and credibility (46%) or helped them to overcome a market barrier (46%). Note that in the next section of the report, results illustrate that clients who received assistance with the removal of market barriers were most likely to say that the TCS made a significant contribution.

Just over four in ten respondents say that the TCS assistance enabled them to avoid mistakes, delays or additional costs (42%), or assisted in areas related to corporate social responsibility (42%, up considerably from 25% in 2019.)[5] Slightly fewer clients say that the TCS helped them address regulatory challenges (38%), and one in three report that the TCS helped them diversify their exports or business lines (33%).

[5] Wording was changed in 2022 from social responsibility in 2019.

Chart 6: Service Outcomes of Interactions with the TCS

QE1A-L. Please indicate whether you agree or disagree with each of the following statements. The TCS helped my organization:
Base: All respondents (n=2978)

Following are segments that stand out in their agreement regarding outcomes from the assistance received from the TCS.

Table 6: Demographic Differences in Service Outcomes
Table 6a: Gain access to intelligence and information otherwise difficult to obtain (63%)

More likely agree
Atlantic provinces (70%)
Large organizations (70%)
Education (71%)
Partner institutions (69%)

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Table 6b: Gaining confidence to explore or expand in a foreign market (62%)

More likely agree
Atlantic provinces (70%)
Education (72%)
Businesses doing occasional international business (67%)
Owned by women (67%)

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Table 6c: Gain access to customers and partners otherwise difficult to achieve without TCS (59%)

More likely agree
Large organizations (67%)
Seeking qualified contacts (64%)
Education (72%)
East/Southeast Asia as a top market (65%)

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Table 6d: Improve knowledge of competitive environment (56%)

More likely agree
Large organizations (66%) and partner institutions (65%)
Education (73%), government/NGO (66%)
Businesses doing regular international business (58%)
East/Southeast Asia (62%) and Africa and the Middle East (61%) as top markets

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Table 6e: Obtain market information to help decisions to pursue a market (54%)

More likely agree
Large organizations (63%); partner institutions (61%)
Education (67%); Agriculture & Processed Foods (59%)
East/Southeast Asia (61%) or Latin American and Caribbean (59%) as a top market

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Table 6f: Improve their marketing strategy (47%)

More likely agree
Partner institutions (56%); large organizations (53%)
Education (61%)
East/Southeast Asia (54%) as a top market

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Table 6g: Improve profile and credibility (46%)

More likely agree
East/Southeast Asia (52%) as their top market
Education (55%)

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Table 6h: Overcome barriers to new opportunities (46%)

More likely agree
East/Southeast Asia (52%) as their top market
Education (55%)

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Table 6i: Avoid mistakes or delays and additional costs in pursuing opportunities (42%)

More likely agree
Large organizations (49%)
Education (52%)
East/Southeast Asia (50%) as their top market

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Table 6j: Obtain information and assistance on responsible business conduct (42%)

More likely agree
Atlantic provinces (49%)
Education (50%)
Receiving market potential assessment services (47%)
East/Southeast Asia (51%) and Africa and the Middle East (48%) as their top markets

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Table 6k: Improve ability to address regulatory problems or other non-tariff barriers (38%)

More likely agree
Receiving additional services (45%) or market potential assessment (42%)
Agriculture & Processed Foods (48%)
Partner institutions (44%)
East/Southeast Asia (45%) as their top market

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Table 6l: Gain confidence to diversify product lines exported or pursued (33%)

More likely agree
Agriculture & Processed Foods (38%)
East/Southeast Asia (41%) as their top market

Base: All respondents (n=2978) / % somewhat agree/strongly agree

Between one in three and half of clients say the TCS made a considerable to essential contribution in each of the tested activities in markets where they requested assistance. In particular, close to half of clients say that the TCS made considerable or essential contributions by helping to remove market barriers (53%), helping to establish revenue-generating partnerships (46%) and helping with sales through foreign affiliates (43%). More than a third reported a sizable contribution with the export of goods and services (38% and 39%, respectively), attracting investors or venture capital, with information on licensing of technology (36% each), or with investment abroad (35%). Contributions were also reported with new direct investment (31%) and expansion of existing investment in the organization (30%).

Table 7: Contribution of the TCS Services

Activities Where Assistance was Provided	2022	2019
Sales resumption/increase after removal of market barrier (n=134)	53%	44%
Revenue-generating partnership, joint venture (n=800)	46%	41%
Foreign affiliate sales (n=209)	43%	39%
Export of services (n=832)	39%	32%
Export of goods (n=1042)	38%	32%
Attracting angel investors or venture capital (n=163)	36%	30%
Licensing of technology (n=169)	36%	28%
Investment abroad leading to revenue (n=144)	35%	27%
New direct investment in my organization (n=186)	31%	29%
Expansion of existing investment in my organization (n=146)	30%	31%

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

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

- Clients with five or fewer years of international business experience are more likely than others to report contributions as a result of the TCS assistance with investment abroad leading to revenue (30%) and attracting direct investment in their organization (28%).
- Those in the Atlantic provinces were more likely to report a key contribution as a result of assistance with exporting services (25%) compared with other clients.

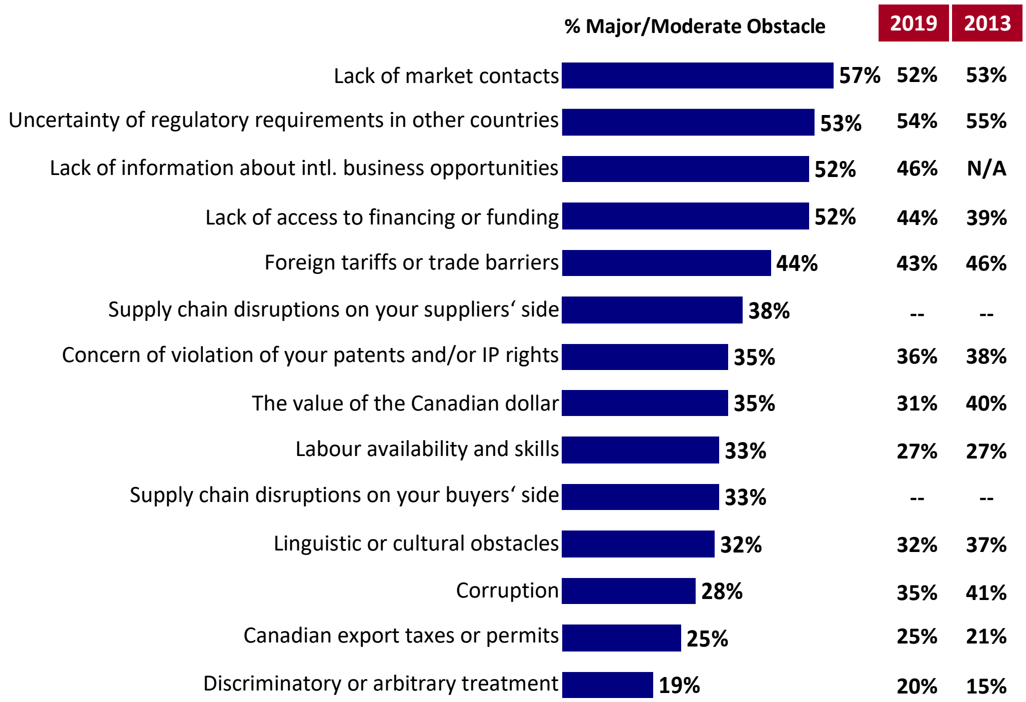
E. OBSTACLES TO INTERNATIONAL TRADE

In terms of obstacles to activities in international markets, the most often noted obstacle is a lack of market contacts (57%), up slightly from 2019. Uncertainty about foreign regulatory requirements (53%), a lack of information about international business opportunities (52%) and a lack of access to financing (52%) were also cited by just over half of clients (the latter two activities were noted more often than in 2019, 46% and 44%, respectively). Foreign tariffs or trade barriers were mentioned as obstacles by 44% of clients, similar to previous results.

New to 2022, supply chain disruptions on the supplier side were mentioned by just under four in ten clients (38%). Concerns about violations of patents and intellectual property rights (35%, on par with 2019) and the value of the Canadian dollar (35%) continue to be a challenge for just over one in three. Similarly, one in three clients also noted challenges related to labour availability and skills (33%, listed more often than in 2019 or 2013), supply chain disruptions on the buyer side (33%, new in 2022) and linguistic or cultural obstacles (32%).

About one in four noted corruption (28%, noted less often than in 2019 or 2013) and Canadian export taxes or permits (25%) as major or moderate obstacles in international markets for their organization. This is followed by 19% pointing to discriminatory or arbitrary treatment as an obstacle.

Chart 7: Obstacles to Conducting International Trade



C2A-P. How large of an obstacle are each of the following issues to your organization's activities in international markets?
Base: All respondents (n=2978)

The following tables show the relative importance of trade obstacles broken down by demographic group.

Table 8: Demographic Differences in Obstacles

Table 8a: Lack of market contacts such as potential buyers and partners, technology sources, agents (57%)

More likely to be an obstacle	Less likely to be an obstacle
TCS service – Preparing for int'l markets (62%)	Large organizations (40%); partner organizations (41%)
Information & Communications Technology (69%) Life Sciences (65%)	Mining (42%) Government/NGOs (44%)
Women owned (67%)	TCS service – Problem solving (41%)
Visible minority owned (73%)	Over 10 years in int'l business (49%)
Planning to export (71%)	--

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8b: Uncertainty of regulatory requirements in other countries (53%)

More likely to be an obstacle	Less likely to be an obstacle
Planning to export (58%)	--
SMEs (55%)	--
Agriculture & Processed Foods (67%) Life Sciences (62%)	Education (33%) Arts & Cultural Industries (34%)
Visible minority owned (60%)	

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8c: Lack of information about international business opportunities (52%)

More likely to be an obstacle	Less likely to be an obstacle
Alberta (57%)	Large organizations (32%)
TCS service – Preparing for int'l markets (59%)	TCS service – Problem solving (36%)
Information & Communications Technology (62%)	Education (36%)
Women owned (65%)	Regular business in a foreign market (48%)
Visible minority owned (68%)	--

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8d: Lack of access to financing or funding (52%)

More likely to be an obstacle	Less likely to be an obstacle
Alberta (61%)	Regular business in a foreign market (46%)
Preparing for international markets (59%)	> 10 years in international business (40%)
Arts & Cultural Industries (73%) Life Sciences (65%) Cleantech (60%) Information & Communications Technology (59%)	Education (36%)
Women owned (69%)	Large organizations (33%)
Visible minority owned (70%)	--

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8e: Foreign tariffs or trade barriers (44%)

More likely to be an obstacle	Less likely to be an obstacle
Agriculture & Processed Foods (68%) Responsive sectors (50%)	Education (17%) Arts & Cultural Industries (30%)
Visible minority owned (51%)	Large organizations (29%)

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8f: Supply chain disruptions on your suppliers' side (38%)

More likely to be an obstacle	Less likely to be an obstacle
TCS service – Problem solving (47%)	Large organizations (24%)
Defence & Aerospace (52%) Agriculture & Processed Foods (50%) Mining (49%) Responsive sectors (48%) Cleantech (46%) Life Sciences (45%)	Education (11%) Information & Communications Technology (26%)
Visible minority owned (45%)	--

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8g: Concern of violation of your patents/IP (35%)

More likely to be an obstacle	Less likely to be an obstacle
Alberta (43%)	Large organizations (26%)
Cleantech (48%) Information & Communications Technology (41%)	Agriculture & Processed Foods(26%) Arts & Cultural Industries (26%)
Women owned (43%)	
Visible minority owned (41%)	--
Planning to export (49%)	--

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8h: The value of the Canadian dollar (35%)

More likely to be an obstacle	Less likely to be an obstacle
Women owned (40%)	SME (35%)
Visible minority owned (41%)	--
Agriculture & Processed Foods (45%) Arts & Cultural Industries (45%) Education (41%)	Information & Communications Technology (24%)

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8i: Labour availability and skills (33%)

More likely to be an obstacle	Less likely to be an obstacle
Quebec (40%)	Large organizations (26%)
Plan to export (39%)	TCS service – qualified contacts (30%)
TCS service – Preparing for int'l markets (38%)	--
Information & Communications Technology (39%)	Education (20%)

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8j: Supply chain disruptions on your buyers' side (33%)

More likely to be an obstacle	Less likely to be an obstacle
Visible minority owned (42%)	Large organizations (22%)
Agriculture & Processed Foods (49%) Responsive sectors (41%) Cleantech (40%)	Education (11%) Arts & Cultural Industries (17%) Information & Communications Technology (26%)

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8k: Linguistic or cultural obstacles (32%)

More likely to be an obstacle	Less likely to be an obstacle
Information & Communications Technology (37%)	Agriculture & Processed Foods (28%)

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8l: Corruption (28%)

More likely to be an obstacle	Less likely to be an obstacle
Large organizations (33%)	Partner organizations (21%)
Mining (48%) Infrastr/Building Prod & Serv. (38%) Oil & Gas (37%) Cleantech (36%) Defence & Aerospace (35%)	Arts & Cultural Industries (10%) Information & Communications Technology (21%)
<6 years in int'l business (23%)	--
Exporting to Latin America & Caribbean (39%), Africa & Middle East (34%)	--

Base: All respondents (n=2978) / % moderate/major obstacle

Table 8m: Canadian export taxes or permits (25%)

More likely to be an obstacle	Less likely to be an obstacle
Planning to export (31%)	Large organizations (21%)
Defence & Aerospace (43%) Agriculture & Processed Foods (36%)	Education (10%) Information & Communications Technology (18%)
Visible minority owned (30%)	

Base: All respondents (n=2978) / % moderate/major obstacle

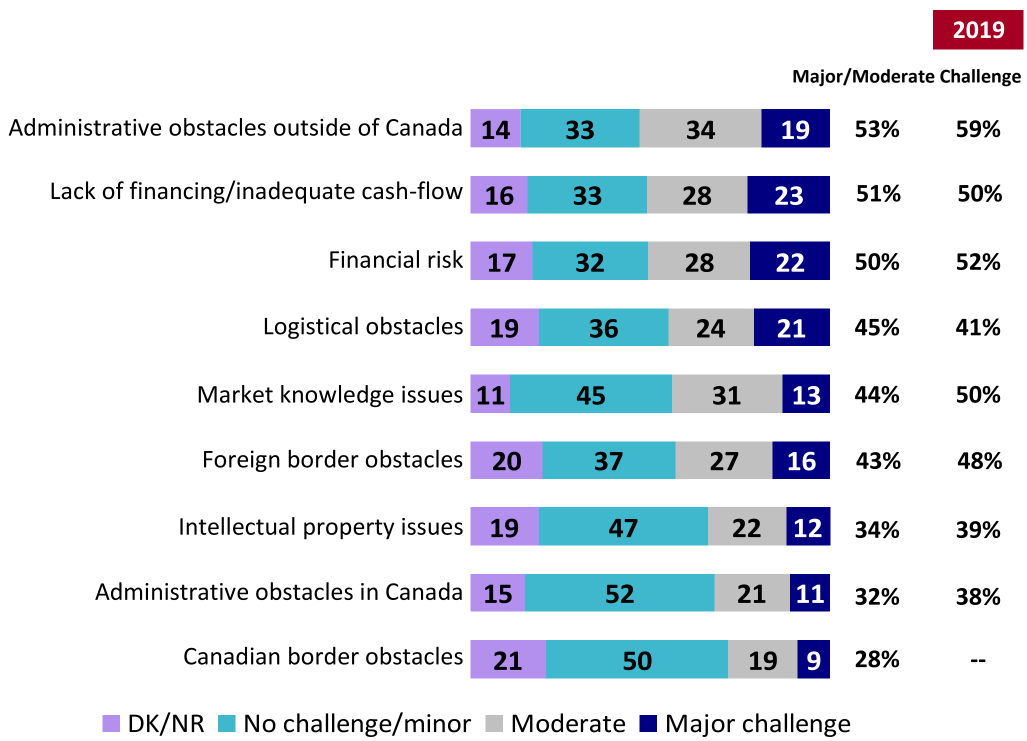
Table 8n: Discriminatory or arbitrary treatment toward Canadian investors (19%)

More likely to be an obstacle	Less likely to be an obstacle
Alberta (25%)	--
Oil & Gas (30%)	

Base: All respondents (n=2978) / % moderate/major obstacle

Just over half of the clients say that administrative obstacles outside of Canada (53%, a slight decrease from 59% in 2019) are a moderate to major challenge in relation to their organization's exporting activities. Similar to 2019, about half of clients indicate that lack of financing or inadequate cash flow (51%) or financial risk (50%) is a challenge. Fewer cite logistical obstacles (45%), market knowledge issues (44%, a decrease from 50% in 2019), or foreign border obstacles (43%, down from 48% in 2019). About one in three clients say that intellectual property issues (34%) or administrative obstacles in Canada (32%) are a challenge; fewer respondents identify these as challenges compared with 2019. Although 28% of clients say Canadian border obstacles are a challenge, half (50%) indicate it is no more than a minor challenge.

Chart 8: Challenges Related to Export Activities



F3A-I. How challenging do you consider each of the following issues to be, in relation to your organization's exporting activities? Please rate your view using the scale provided.
Base: All respondents (n=2978)

Table 9: Demographic Differences of Challenges Related to Export

Table 9a: Administrative obstacles outside of Canada (53%)

More likely to be a challenge	Less likely to be a challenge
Visible minority owned (60%)	Large organizations (46%)
Agriculture & Processed Foods (69%)	Education (42%) Information & Communications Technology (46%)

Base: All respondents (n=2978) / % moderate/major challenge

Table 9b: Lack of financing/inadequate cash flow (51%)

More likely to be a challenge	Less likely to be a challenge
TCS service – Preparing for int'l markets (61%)	Large organizations (27%)
Planning to export (71%)	Over 10 years in int'l business (39%)
Arts & Cultural Industries (71%) Life Sciences (65%) Cleantech (65%) Information & Communications Technology (62%)	Agriculture & Processed Foods (45%) Government/NGOs (32%) Education (28%)
Woman owned (72%)	--
Visible minority owned (75%)	--

Base: All respondents (n=2978) / % moderate/major challenge

Table 9c: Financial risk[6] (longer payment terms or risk of non-payment from customers) (50%)

More likely to be a challenge	Less likely to be a challenge
Planning to export (56%)	Large organizations (33%)
Cleantech (59%) Defence & Aerospace (57%)	Education (22%)
Woman owned (61%)	Over 10 years in int'l business (47%)
Visible minority owned (65%)	--
Exporting to Africa & Middle East (63%)	--

Base: All respondents (n=2978) / % moderate/major challenge

[6] Longer payment terms or risk of non-payment from customers

Table 9d: Logistical obstacles[7] (transportation costs, brokerage fees) (45%)

More likely to be a challenge	Less likely to be a challenge
Woman owned (48%)	Large organizations (31%)

Base: All respondents (n=2978) / % moderate/major challenge

Table 9e: Market knowledge issues[8] (local language and culture, potential markets) (44%)

More likely to be a challenge	Less likely to be a challenge
Woman owned (52%)	Large organizations (34%)
Visible minority owned (49%)	Over 10 years in int'l business (40%)
Planning to export (53%)	--

Base: All respondents (n=2978) / % moderate/major challenge

Table 9f: Foreign border obstacles (e.g. tariffs, import quotas, custom duties) (43%)

More likely to be a challenge	Less likely to be a challenge
--	Large organizations (32%)
Agriculture & Processed Foods (64%) Mining (53%)	Education (22%) Information & Communications Technology (32%)

Base: All respondents (n=2978) / % moderate/major challenge

Table 9g: Intellectual property issues (concerns of violation of IP rights) (34%)

More likely to be a challenge	Less likely to be a challenge
TCS service – Preparing for int'l markets (39%)	Large organizations (22%)
Planning to export (49%)	Over 10 years in int'l business (26%)
Life Sciences (45%) Cleantech (42%) Information & Communications Technology (44%)	Education (16%)
Woman owned (46%)	--
Visible minority owned (44%)	--

Base: All respondents (n=2978) / % moderate/major challenge

[7] Examples: transportation costs, brokerage fees

[8] Examples: local language and culture, potential markets

Table 9h: Administrative obstacles in Canada (32%)

More likely to be a challenge	Less likely to be a challenge
Large organizations (38%)	--
Agriculture & Processed Foods (43%) Defence & Aerospace (42%) Education (41%)	Information & Communications Technology (21%)
Exporting to South & East Asia (38%)	--

Base: All respondents (n=2978) / % moderate/major challenge

Table 9i : Canadian border obstacles (e.g tariffs, import quotas, custom duties) (28%)

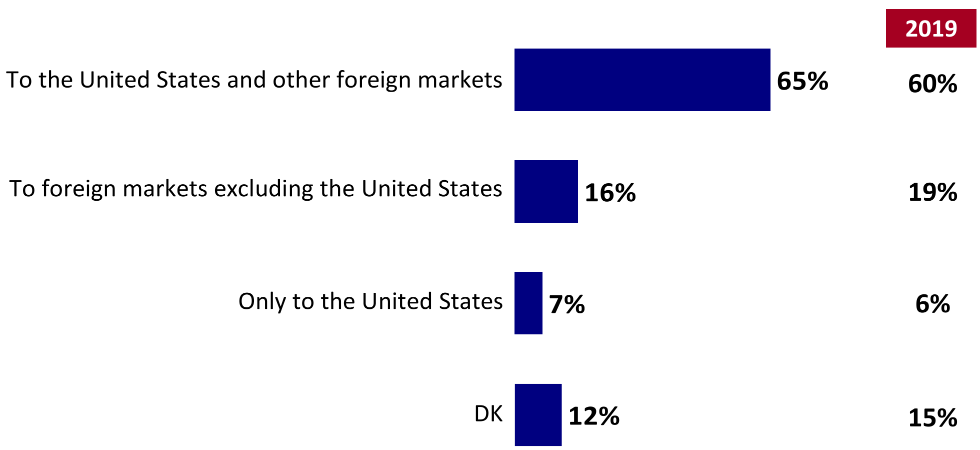
More likely to be a challenge	Less likely to be a challenge
Women owned (35%)	Large organizations (23%)
Planning to export (33%)	--
Agriculture & Processed Foods (38%) Education (29%)	Information & Communications Technology (20%) Cleantech (23%)

Base: All respondents (n=2978) / % moderate/major challenge

F. Market Diversification

Two in three clients (65%) say they export goods and services to the United States and to other foreign markets, which is marginally higher than in 2019. An additional one in five (16%) say they export goods and services to foreign markets excluding the United States. Fewer than one in 10 (7%) say they export only to the United States, and just over one in 10 (12%) did not know how to answer the question.

Chart 9: Export Activities to the U.S. and Other Markets



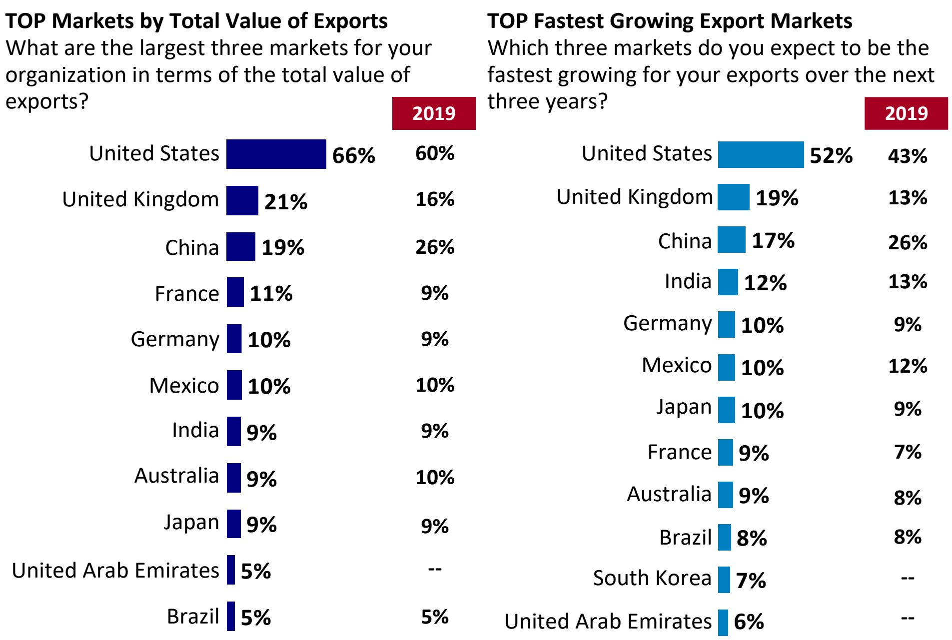
QF1X. Where does your organization export goods and services?
Base: All respondents (n=2413)

- Exporting only to the United States is most likely among those preparing for international markets (12%) and those who have been doing sporadic international business (12%). This is also more prevalent among organizations owned by women (11%), those with five or fewer years of experience with international business and TCS clients located in Alberta (11%).
- Organizations exporting to countries outside of the United States are more often targeting Africa or the Middle East (30%), followed by Latin America and the Caribbean (26%) and South and/or East Asia (24%). This is also the case in the education (29%) and agriculture & processed foods (20%) sectors.

When asked to name their organization's three largest export markets, respondents most often identified the United States (66%), followed at a distance by the United Kingdom (21%) and China (19%) as a top market for their organization. France, Germany, Mexico, India and Japan are each noted by roughly one in ten clients as top three markets. Compared with results from 2019, the United States, the United Kingdom and China have risen significantly as key export destinations.

When asked to name the three markets for their organizations' exports which they expect to grow the fastest over the next three years, respondents again identified the United States (52%) as the top market followed by the United Kingdom (19%), China (17%) and India (12%). The United States is considerably more likely to be seen as the fastest-growing market in 2022 compared with 2019 results, as is the United Kingdom, while China is less often mentioned in 2022 compared to 2019.

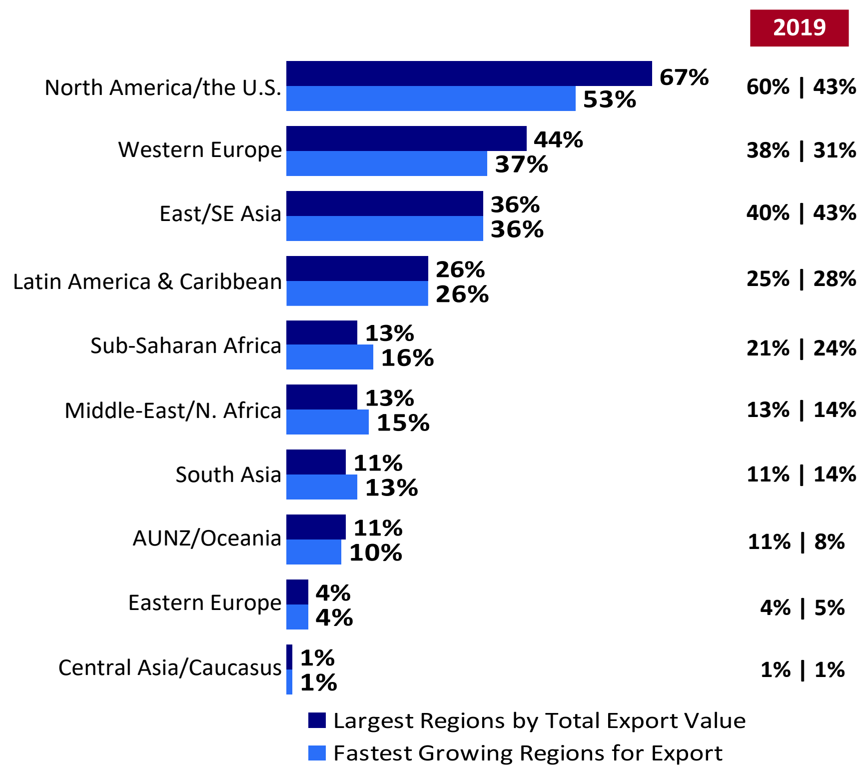
Chart 10: Top 10 National Markets by Total Value of Exports and Growth



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

The following chart provides a regional summary of results for the largest current markets and those expected to grow the fastest in the next three years. Since Mexico has been included as part of Latin America for this survey, the result for North America is only for the United States.[9] As such, North America is considered by 67% as the largest region for current exports, up from 60% in 2019. North America is also expected to be the fastest-growing market over the next three years, according to 53% (also up from 2019). North America and Western Europe, with the oldest and best-established trading relationships with Canada, are the only regional markets where the proportion of respondents identifying these as the fastest-growing markets is lower than the proportion that identify them as top current markets. This pattern mirrors 2019 results, although the sub-Saharan region is less prominent among TCS clients in terms of size and extent to which it is perceived as a growing market compared with 2019.

Chart 11: Regions by Total Value and by Fastest Growing Export Markets



QPF1. Largest Regions by Value of Exports: What are the largest three markets for your organization in terms of the total value of exports? (n=1951; currently exporting)

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

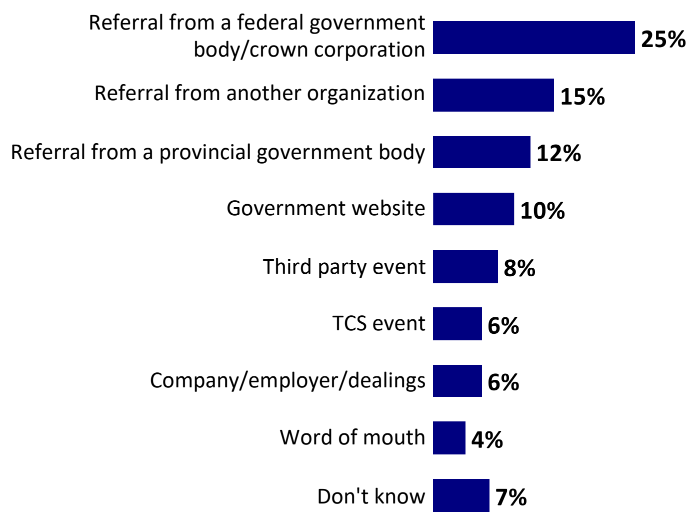
Base: Respondents who do international business outside of the U.S. (n=1325; subset of those currently exporting)

[9] Although North America also includes Greenland, Bermuda and U.S. island states, these have no impact on the results.

G. LEARNING ABOUT TCS SERVICES

When asked how they initially learned about the TCS, respondents most often say they were referred by another federal government body or Crown corporation (25%), followed by referrals from a provincial government body (12%) or another organization (15%). Another 10% learned about the TCS on a government website, 8% attended a third-party event and 6% learned from an event organized by the TCS. A further 10% learned about the TCS through another company or employer or they have had dealings with the TCS in the past (6%) or through word of mouth (4%).

Chart 12: Initial Source of Awareness of the TCS



QA1. How did you initially learn about the Trade Commissioner Service (TCS)?
Base: All respondents (n=2978)
Only items with 3% or more shown.

- Referral from a provincial government body is more likely in the Atlantic provinces (23%) or Alberta, Manitoba or Saskatchewan (18%), as well as in the agriculture & processed foods sector (21%).
- SMEs are more likely than larger organizations or partner institutions to have learned about the TCS through a referral by a provincial organization (13%) or another organization (15%).
- Businesses owned by women are also more likely than other organizations to have received a referral from an organization outside of the federal government or a Crown corporation (18%).

H. Experience with and Activities in International Trade

About two in three clients say their organization has done business abroad for over a year (65%). An additional 12% say they have only sporadically done business abroad. One in five respondents overall (19%) describe their organization as relatively inexperienced with international trade, saying either that they plan to do business abroad within a year (11%), that they are considering doing so within five years (5%), or that they have been doing business abroad for less than one year (3%). These results are similar to those in 2019.

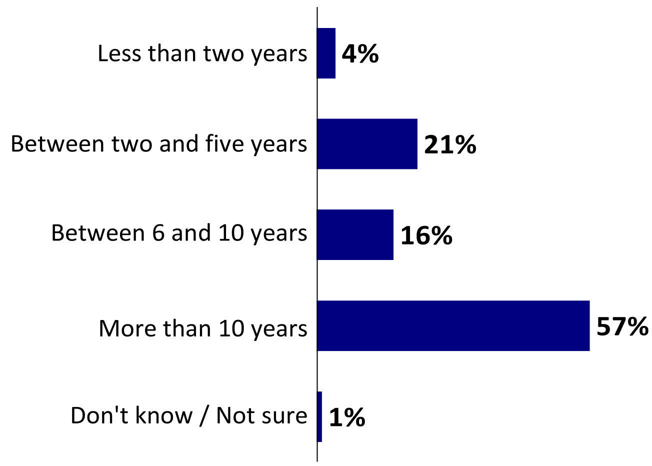
Chart 13: Nature and Length of Experience with International Trade

QA2. Which of the following statements best describes your organization?
Base: All respondents (n=2978)

- Businesses owned by those self-identifying as Indigenous (26%), a visible minority (21%), or women (20%) are more likely than other organizations to be actively planning to do business in foreign markets within the next 12 months. This is also more often the case in the life sciences sector (21%) than in other sectors.
- Those most likely to have done regular business in foreign markets are in the defence and aerospace (81%) and education sectors (75%).

More than half of clients have done business internationally for more than 10 years (57%). Only 4% of those currently doing business internationally have less than two years of experience in this area.

Chart 14: Years of International Business Experience



QA3. How many years has your organization done business internationally?
Base: All respondents (n=2315)

When asked what activities they are currently engaged in abroad, clients most often say they are exporting goods and services (67%) to foreign markets. Just over one in three say they are engaged in partnerships with foreign organizations (37%) or are seeking R&D or other technology partnerships (35%). About one in five (21%) are seeking project financing or venture capital, or licensing a product, brand or technology to a foreign organization, while 11% are licensing a product, brand or technology from a foreign organization.

Results are similar to those found in 2019 although there is a somewhat larger proportion currently soliciting foreign investment.

Chart 15: Current Engagement in International Trade

QA4. Is your organization currently engaged in any of the following activities?
Base: All respondents (n=2978)
Only items with 3% or more shown.

Detailed Interview Findings

A. Interactions with TCS

Types of service requests

Interview participants were first asked to describe their last interaction with the TCS to provide context for the further discussion of how well the service worked for them, the most positive elements of the service and areas where they believe improvements are needed. While the 41 interview participants described various interactions, the type of service they requested generally fell under a few main areas.

Contacts and introductions

Many participants approached the TCS for suggestions about appropriate local buyers and, in a few cases, local investors or suppliers. A few asked the TCS to introduce them to potential clients, while a few others did their own research but wanted help from the TCS in doing some advanced research to vet potential contacts as legitimate buyers. A few were looking for strategic advice, guidance or recommendations from TCS staff about which contacts to pursue.

> We were asking about financiers in Singapore to see if they had the capacity to be investors on a [sector] project there.
>
> [The TCS] helped us arrange the meetings (business matchmaking) for the in-person, including prospective clients and also potential partners who could sell our software in Japan.
>
> We felt it would be valuable to have local contacts to take the product to market.
>
> At first I was asking about expansion into the U.S., the U.K., the EU and Japan. I was looking for contacts, but also a better understanding of the business landscape (what to do, how to enter, what areas, steps to follow).
>
> There are a couple of companies in the Middle East we are interested in, and we knew that the only way to do that is in a guided way, to be introduced.

A few participants spoke about their participation in trade missions or trade shows. In some cases these events were put on by the TCS, and in other cases the TCS was attending or supporting them in their own events or the events of other organizations. They spoke of these events as important opportunities for visibility in order to connect with potential buyers and suppliers in target countries. A few of these individuals talked about the value of being introduced by the TCS at these events.

> It was very successful. It was one of our biggest lead-generation events. Our team member was there for 2 weeks just taking meetings and follow-up.

> [The TCS] engaged with our marketing team to produce events.

> We were part of the […] Show and there was a TCS matchmaking service that we used to try and meet international delegates who are buyers of services and products like ours.

Market intelligence and information on cultural business landscape

Some participants said they approached the TCS for market intelligence regarding their potential to be competitive in specific countries. A few others were looking for more general information about the local business culture and how things are done in a certain country, and possible barriers to moving forward in a market.

> We needed to understand what the requirements were with the market.

> Helping us do landscape mapping to understand the market.

> [Working on a project expansion and] I needed to understand a few things, such as market size. I needed cultural contexts and habits in terms of consuming natural health products.

> We often use them [the TCS] for insight into a country and how they do things (the business culture). They advise you on how to do things and how to communicate/not communicate, what timing would work best or what steps to take in what order.

Specific information related to rules and regulations

A few participants were looking for information about regulations in specific areas of target markets. Two participants were looking to the TCS for support in negotiations or litigations with parties in foreign countries.

> [The TCS] helped us arrange a meeting with the federal money laundering watchdog.

> I approached the TCS about an issue of payment from a large utilities company in [country], involving a sub-contractor.

Assistance or advice regarding funding

A few participants approached the TCS to ask about sources of funding or were looking for guidance about eligibility and the application process for CanExport.

Most helpful elements

Among those satisfied with their most recent interaction with the TCS, interview participants described a range of positive aspects of the service as particularly helpful. A theme often noted related to understanding the business culture in a target country. This included information on how to navigate the process and cultural norms within a market.

> They know who to go to, know how to navigate the system.
>
> Understanding of how these countries work [cultural approaches]. This was necessary to be able to close a contract. I could understand the speed at which things will operate and how international opportunities present themselves in those markets.
>
> It was understanding the culture. Every country has its own culture and you have to know how do we respect it? How do they respect ours? It’s important, getting that communication first in order to open doors and begin the relationship.

A second service that participants found to be useful is the provision of contacts and ability to help clients make local connections, open doors and support introductions. This includes the ability to “vet” organizations as identified by the participant, or make “warm” introductions to an organization in the market. Two participants talked about the value of having the TCS presence as “boots on the ground” in the foreign country or representation by the Government of Canada.

> It was really helpful just getting the background and local introductions. We were face-to-face with prospective customers.
>
> Developing contacts in the U.S. market. We received lists of people who could be potential clients for us. The TCS staff member helped us develop a client network in the U.S.
>
> [We received information on] good match contacts for potential clients and partners. They helped set up meetings and did some advance work, which was very thorough. Giving us information about the contacts in advance was very useful for our business team to plan ahead of time.
>
> [Information on] where people in the sector go, to learn the state of the industry. Key events in market. Help me whittle down where I have the best chance of meeting the people.
>
> They represent Canada. We can’t hop on a flight every problem we have. They are our voice sometimes.

Some participants found the level of engagement and commitment of the Trade Commissioner they were dealing with to be helpful. A few spoke of their keen interest, additional research and follow-up Trade Commissioner. A few spoke about the strategic advice they offered and the trust they earned.

> The Trade Commissioner was very engaged and willing to assist. He took the time to understand what I was telling him and what the market looked like. Afterwards he did his own research. It resulted in two fairly

targeted referrals. Having that engagement resulted in better information and referral. I felt like I had a strategic advisor on the ground in-country, who was looking out for me. That builds trust and confidence.

The TCS in Ontario was very strong on content, very effective in communication and very helpful. I was very pleased with the level of knowledge and expertise. It was as if you were talking to a real content expert.

The contact I have in Manitoba [….] linked me up with the right people and forwarded information about seminars, workshops. I'm in the loop. He updates me. This is a great help.

I've requested some custom solutions and I've always been satisfied with what I got. I feel they went the extra mile to respond to our needs.

A few participants felt that the TCS provided specific market intelligence related to the sector or advice on trade shows or other events to attend in order to connect with the most relevant contacts.

Understanding the market dynamics. How are the products sold. The criteria for success because it's one thing to export but it's an investment and risk to take. What is our pricing, messaging and product offering. I wanted to know what are the best-selling products and the brands and messaging from the competitors. [The TCS] gave us insights to [help us] prepare an offering to meet with buyers.

The most interesting stuff from the TCS is the resources that help provide insightful market research, reports on the […] market and the [sub] sector. [More recent material] provided some separation [of specific sub-sectors] and that's where the value got more interesting.

[We received] a thorough analysis of the local marketplace, HR availability, salary comparison report, education institutions, finance options. It was very comprehensive and detailed, and gave us a good understanding of how we could set up our business from a technological standpoint.

Two participants spoke about the information they received that helped them with decision making:

I think they did as much as they could, and it helped me make the right decisions.

[The TCS] told us about a number of programs. We didn't get involved in any of those programs, but it did help us see the direction we should be going when we get big enough to be eligible for them.

Among those indicating dissatisfaction with their most recent services from the TCS, there was limited descriptions of elements that were particularly helpful. Many described what they would like to receive, which are outlined in the next section on additional needs and gaps. A few areas relate to being connected with local sources and networks and inclusion in social events that afforded opportunities to speak with local contacts. One noted the value of the TCS newsletter.

There have been social functions and networking functions that have been helpful. They got all the Canadians together at a dinner and people started working together that way.

Areas for improvement

Participants described areas where they believe the TCS could be doing a better job to support businesses. The most prevalent of these centred around the inconsistency of assistance they receive from different missions, along with concerns about a lack of responsiveness or slower than ideal turnaround times. A few said they do not feel that as clients they are a priority, possibly because they are a small organization, or a start-up, or in a sector that is not accorded a high priority.

> Some missions are eager to jump, and others move like molasses. There's a lot of pressure to resolve quickly, and GAC doesn't always respond quickly.
>
> Some markets are exceptionally good, then there are other markets where the person is not as effective and the market suffers as a result.
>
> It took maybe five or six months, post conference to get some of that follow-up (e.g. list of contacts who attended in specific sector). I think if it had been a little bit quicker, the momentum I had from the conference might have maybe push things a bit further.
>
> TCS arranged meetings on the trade mission, but I got a sense that I was not being given priority.
>
> Smaller enterprises need more support to get to medium [sized]. We aren't getting any support through the traditional banking system, and we aren't getting any support from Global Affairs Canada.
>
> I would like to understand if their emphasis is not on start-ups. Maybe only established companies, 5-10 years in the business, that would be good to know at the outset so I wouldn't waste their time or mine.
>
> We are in the financial services, data and technology sector, and I think the TCS should have a separate unit in this sector. There is one under ICT but I think there could be one for financial services.

The second most commonly noted theme related to a lack of sector-specific knowledge, resulting in less customized information and contacts than is required by clients for these to be useful.

> The defence sector is really big in target markets but TCS seems to have limited knowledge or priority in some of these sectors.
>
> The contact I received, I could have done a better job just through a Google search.
>
> [Speaking about trade mission in specific sector] They need to use [trade mission] organizers who understand specific areas [sectors and sub-sectors], and knows who is who in each country. And, [the missions] need to focus more narrowly.
>
> I don't think we really need to speak with a representative in the country; we need to speak with an expert in software. Particularly these days the fact that someone is in-country is almost irrelevant. Frankly, I know more about the sector than anyone I spoke with [on the trade mission] in the various countries. It doesn't make sense to me. We want to speak with experts.

A few said that they would have liked more or better information related to the business culture in the foreign country. A few said they would have liked more active engagement and the provision of strategic advice from the TCS to help them with decision making and planning.

> It would be great if we could have some more specific connection to buyers while we are [attending trade show such as] 1-on-1 meetings to have more specific exposure. Also, advice on how to spread the word at the show to make the most of the attendance.
>
> The information I received, I couldn't do anything with it. You had to wade through it yourself to make sense of it. There was no guidance or advice or coaching, which is what I really wanted. A lot of people don't have a lot of experience in moving into foreign markets. They need to be shown how to enter a market (e.g. considerations, steps, rules, etc.). There wasn't any of that. I needed someone to take that large volume of information and shape it for me.
>
> There should be more information, like videos on the web, that help you understand the local culture better.
>
> I want some sort of introductions in U.S. cities on doing business in key cities [regulations, business advice on steps]. I have made those requests numerous times and never got information that was helpful.

A few felt that the services of the TCS are not as advertised:

> What they [the TCS] assert to offer, they have difficulty delivering.
>
> All of the things they say they do are attractive. I have dealt with a few missions, and there is a pattern to it. They say "tell me about your company", and that makes sense. You go through those steps. The next expectation is that they say they know some relevant contacts, and connect you, and follow through on that [this is not how it went].
>
> We are looking for service from the TCS to take the product to market. I think it's their mission but it was a complete failure. I can't point to anything that I can say was useful.

Other suggestions made by one individual each include:

- The need for a searchable database with specific sector codes that would allow buyers and suppliers to connect with the TCS as the trusted intermediary
  - [an] interactive database of international buyers and Canadian suppliers, with very specific coding of what they are selling or buying and in what countries that would allow anyone to go in and search for the contacts. You don't need to be on a trade mission or go to the countries at all in this day and age.
- More power (clout) to enforce regulations in foreign countries
  - They need to have some power and willingness to fight for businesses.
- More trade shows
- Fewer government stipulations (conditions) for clients in the private sector (restricting ability to make necessary moves to remove barriers to progression of projects)

- When the government gets involved it introduces more complexities. [….] They start asking you [for rules to follow]. […] Sometimes even knowing that government has involvement, some companies walk away.

Additional needs/gaps

Participants also spoke about areas where they feel the TCS does not adequately meet their needs or additional needs or gaps that they would like the TCS to be aware of. These largely relate to areas for improvement in the previous section, with some higher level or overarching concerns related to the need for

- more advice, guidance or support
- greater sector-specific knowledge and awareness in various markets
- more customized or relevant contacts

In terms of need for additional support, a few are looking for more guidance around funding:

> Would want more knowledge of funding opportunities similar to Defense Innovation Funding in Canada guidance or support they offer in filling out applications for funding
>
> The criteria listed online [for CanExport] are very stringent. We don't have the time to fill out long applications for things that might or might not happen.

A few suggested that an online database or portal would allow them to perform their own searches for relevant contacts:

> Having a portal would be good […] to provide specialized information procedures, legal, and whatnot in each country. That could be helpful. They [the TCS] could be a hub for connecting with experts, but it needs software and to be kept up to date regularly in order to be useful.
>
> I would love a repository that you could search [by market, populated by TCS in the market] that includes marketplace collaborators, IT firms that could help you further develop your product, sales engines. If you could sort potential collaborators by industry or segment, all of that would be helpful. That allows me not to be dependent on my relying on a guy sitting in a cubicle in an embassy somewhere.

A few said that they would simply like to obtain more individual attention and assistance from Trade Commissioners:

> [The TCS should be] doing more to help very small businesses, who effectively need the most help.

A few would like to see more clarity in terms of what types of businesses or sectors are a priority for the TCS to support. These participants perceive that they are not getting the desired attention from the TCS because they are not a priority:

> We are the only type of supplier of this type of equipment in the world and we are sought after. I perceive that we are too small for them to be interested in what we do. They seem to want to network only with really big [companies].

A few said they would like more relevant contacts and information:

> I would like good contact information and information I can use [customs, regulations]. I would ideally like to tap into a good network of events and matchmaking services and information about the food industry in the countries, or someone to suggest who to see when I am in the country for other things (e.g. trade shows).
>
> I would have wanted to invest more time in talking about the various opportunities and the insights on the potential partners rather than the general Mexican culture or lifestyles.
>
> [We received a] giant file of generic [contacts]. It's better if they can streamline. We won't have time [to weed through it].

A few spoke of better support at trade shows:

> I don't think the pavilions represent Canada well. They look quickly put up and lacking in thought. They aren't well situated in the trade show. They [the TCS staff attending the shows] haven't been interactive and engaged. There is just not a good value proposition for people who want to do business.

A few generally expressed disappointment and concern about the approach taken and quality of service provided to Canadian businesses:

> It is super competitive out there and unless we pull up our socks the next generation is going to lose. There needs to be much deeper strategic planning of Canada's exporting efforts and that requires ongoing input from the industry, very regularly.
>
> There really wasn't anything in the experience that was helpful, and I say that with a level of difficulty, because I want this to work for my consulting company that is based in Canada. When I look at the different programs and the different ways that Canada supports companies physically based in Canada get out into other markets, there's a lot there that I think will be terrifically helpful. I felt they [the TCS] weren't seeing the bigger picture of the benefit in collaboration for Canada.

B. OTHER ORGANIZATIONS

Awareness and use of other organizations

Participants were asked if there are other organizations that offer comparable information or services as those offered by the TCS. Most clients said they are aware of other such organizations. Some pointed to other federal organizations such as EDC or BDC; one or two mentioning NRC, Statistics Canada or IRAP (Industrial Research Assistance Program):

> We attended the Trade Accelerator Program [TAP] in B.C., put on by EDC, BDC and a B.C. trade organization. They bring in experts and so on.

> […] around matchmaking services. We do our own research [for market intelligence]. I get a bit mixed up between them [TCS] and Export Development Canada, and the function of the local embassies in different countries. There's a lot of overlap and I'm really not sure of the distinction. And the provinces have their own bodies that do similar things.

Some mentioned the availability of other private sector professionals, including lawyers, financial consultants or banks, or consultants who assist with navigating financial application processes:

> Agents on the ground. Lawyers for regulatory issues.

> There are a whole load of business development consultancies.

> There are advisors out there who support companies through funding with the government.

> I used to do business in Asia, and I would go to the major Canadian banks with branches in key Asian cities and they would help me a lot with information and private meeting rooms to have meetings and so on.

A few pointed to provincial trade organizations or have worked with federal trade organizations in other markets. A few described their reliance and trust on their own network of business contacts, or use information and connections from associations related to their sector:

> I went to the province in joining a trade mission to China in 2018.

> The provincial counterpart in Quebec offers similar services to TCS, though they have a smaller international footprint than TCS and is therefore not as easily accessible in other countries.

Many participants said they have used the services or accessed information from one of these other organizations. A few have used the services of the BDC (or EDC in one or two cases). A few had retained the assistance of lawyers or other paid consultants, a few had worked with provincial organizations and a few had accessed the services offered by other countries:

> Matchmaking service, yes [we have used them]. You pay them to meet with the clients.

> I got help from […] which is a provincial service, so I did not have to pay for it. They gave me demographic figures and information on centres across Canada [with information about the target demographic market] to see if I could select markets where sales would be good. It helped me to focus on [key markets].

> At one point we registered as a [country] company and the government got in touch with us immediately upon registration knowing that we were a [sector] company and set us up with basically an account and account manager.

Comparison with other organizations

Among the participants in a position to compare other services with those provided by the TCS, most focused on the value of these comparable services. One noted that with the TCS you have the representation of the Canadian government behind you, which adds weight to the assistance you are receiving. A few noted that the services of others (e.g. consultants) are expensive, making the services of the TCS attractive. Two said that the services of the TCS and others are complementary and having options helps to create a more comprehensive or clearer picture:

> The consulting agencies have been a little frustrating and very expensive.

> It’s for profit, but they have to get income. They give you some [information], but to get the full benefit of the information, you have to pay. With Trade Commissioners, there’s no limit, if you ask them to provide whatever you want.

> The combination of Export Development Canada and Trade Commissioners gives us a richness of information that private firms are not able to provide. Especially at the price point [free].

> [The TCS and EDC] are helpful and they’re complementary. The TCS helped lead these, helped navigate.

A few noted that other organizations or professionals are more responsive, one theorizing that this is because they are charging for their service and therefore have a vested interest in doing a good job:

> I would rank that service [matchmakers] better because they have a vested interest in our success; they get paid, which is not the case with the TCS. It’s a more organized and entrenched approach.

> I have limited time on the ground. On an export trip, I can be in 3 countries in 10 days. So, acquiring the information quickly and concisely is important [suggested that this is not the case with the TCS].

A few clients compared the TCS with the services obtained from BDC or EDC, noting that the latter two have many helpful tools, such as online diagnostics, or the Trade Accelerator Program:

> The TAP program was fantastic to make contacts and work with peers to gain new knowledge. Definitely made some wonderful connections [there were high level representatives to connect with].

> The BDC was super helpful. They have a toolkit on their website. There's a ton of helpful information. Even EDC on their website helps you sort out where you would fit best. They have a questionnaire survey. But, even with these organizations, the "S" [small] in SME isn't being focused on. I don't think it's being considered.

A few compared the information from the TCS with that provided by business networks or associations, indicating the latter to be more sector specific and therefore more useful. One participant also said that the information coming from their business network of contacts is trusted because of the relationship developed over time:

> They [business networks] are trusted.
>
> They are [sector] focused and more useful as a result of that. They tend to help us engage with the Trade Commissioner Service. They are complementary.
>
> They [association] provide additional context. [Associations in market] have assembled over there and they're excellent and provide a role. [The association] is better, because TCS is ad-hoc, transactional, and there's a lack of follow up.

Similarly, a few spoke of services offered by their province, with most describing the comparatively positive elements of the provincial services:

> I received a 20-page report from the [provincial service], so that was helpful to have. From TCS I received some emails with a few pieces of information and some links.
>
> Any deal signed goes to the success of Canada. To enable our success, information sharing [between provincial entities and TCS] would be valuable. Provinces should be aware of what the federal government is doing.
>
> The provincial counterpart also offers more in terms of financing for start-ups compared to [the] TCS.
>
> The [provincial] version of TCS has far less bureaucracy to deal with. Every organization appears to be treated as a number rather than as people with needs, though the staff make up for it by working as hard as they can to help.

Two participants described their experiences with government trade organizations in other countries. One described a detailed introduction to the range of services available (market intelligence, financing options, networks to plug into) that gave this representative an impression of a much more fulsome and holistic approach to supporting businesses doing international trade. Another spoke of extensive and well-organized networking opportunities provided by the foreign country, with connections through many parallel organizations:

> It worked better than the TCS because they informed us, and the services were well-defined and coordinated in an overall model. And, it was already set up/in-place and ready to access to help you, including the resources to do it. They also referred us to partners there [private consultants in the country] and then legal followed this immediately. So, there were interconnections that they formed immediately to say "we're going to do this project with you, and here are the resources that we're going to provide you to, to have a better success of this particular project," and it got done.

Unique aspects of the TCS

In terms of services or information provided by the TCS that participants cannot get elsewhere, or consider to be unique, some focused on the extent of knowledge the TCS has in foreign countries. The TCS has an extensive presence in other markets and have a depth of understanding of the business landscape and various players within it. As such, the TCS can connect them with buyers, partners or suppliers in the market. Finally, as representatives of the Government of Canada, the TCS is in a unique position to support Canadian businesses as they have a certain "weight" or "gravity" in making introductions:

> They understand the dynamics, the key players of the market. TCS gives us insights that we aren't going to get anywhere else unless we know a local person there.
>
> The market intelligence—they can vet the company. What they are doing, the legality, this type of information is very important.
>
> There is nothing else that is so broad in scope, on an international basis.
>
> The local understanding of the market and the people. They have relationships with given people in [type of organization] at a local level.
>
> [It's] the level of gravity of having someone as a representative of the Government of Canada introducing me or suggesting I have a conversation. There's certainly a level of respect that customers I'm targeting perceive when someone at this level opens doors. It's not always the exact right door, but at least you're talking to a human being and can then introduce me along. They have a global network that no one else does.

C. BRANDING

TCS image

Participants were asked to describe the TCS using a single word or phrase. A few participants described the TCS as an ambassador or facilitator and focused on the ability of the TCS to facilitate introductions and connections for Canadian businesses exporting to a particular market. Similarly, the TCS "represents" Canadian businesses in foreign markets and allows for a presence to provide information or representation in a foreign market:

> They are helpful to facilitate trade in the local context.
>
> TCS helps introduce you to people in a country where you don't have a presence.
>
> They are facilitators of contacts, but they also show you how to become established in international markets.
>
> It's necessary for a company like us because they open the door.

The image or short descriptions of the TCS vary greatly by whether a participant is satisfied or unsatisfied with the service they receive from the TCS. For those who are satisfied, participants provided positive traits to describe the TCS, such as "knowledgeable", "insightful", "professional" or "trustworthy". These participants said that the TCS has provided assistance needed to support their exporting activities:

> An excellent support system for businesses
>
> Knowledge in exports
>
> The first point of contact for doing any export development, research

Among interview participants who had identified themselves as unsatisfied in the survey, descriptions of the TCS were predominantly negative. Adjectives used to describe the TCS included "powerless", "ineffective", "generic". Some participants lamented the "bureaucracy" or inability to get the support they needed, to receive meaningful support, or to receive follow-through on promised support:

> Not very useful. I can get what I need online in market intel.
>
> They will sell you on their capabilities, but there's no service after the sale.

TCS name

Participants were also asked if the name “Trade Commissioner Service” represents what they consider to be the mandate and objectives of the organization. Most participants focused on each word individually. Most felt that the word “Trade” was straightforward and easy to understand, however, a few participants noted that they do not consider themselves in “trade” but, rather, are exporters or conduct business in foreign markets. Likewise, the word “Service” was considered appropriate by most as the TCS provides a service to Canadian businesses. Two or three participants felt the word service was too narrow or too vague:

> That’s a reasonable naming. For us, it’s about trade. It works for us. They certainly provide a service.
>
> Trade is straightforward. It’s succinct enough and high enough level. It makes sense to someone who is involved in trade.
>
> If what they do is assist on exports then that should be in the name somewhere.
>
> They are providing a service, but I don’t have a clean understanding of what is the service and how are they going to add value to my business.

The word “Commissioner” received mixed reviews. A few said that they are not sure what the word means, or that it sounds “old fashioned” or bureaucratic. A few said that the name connotes government, or represents the position of a Trade Commissioner and is appropriate as that is who is offering the support.

> I’m not sure what Commissioner could mean.
>
> Advisor is much better than Commissioner.
>
> Commissioner means that they are providing a service and not business entrepreneurs.

A few perceived that the name of the TCS has changed over the years and the name is not the important aspect, but rather the quality of the products, support and services offered and received by Canadian businesses. A few said they are simply used to the name and it serves the organization well. A few participants said that they had not given it any thought or that any name change would cause confusion. A few said that the name should be updated to instil a more modernized, action-oriented, or nimble image:

> There might be many other names to call it, but for me it works.
>
> They go through name change all the time. It seems like every couple of years they change their name. It’s the latest name for the group of people who work for Canadian embassies in order to promote Canadian businesses and unique opportunities.
>
> I think the name reflects what they do. I’ve never had any problems with nuance or any of that.

> Does it say exactly what it does, no, but it's probably not important. It's more that they need to do better messaging of the services they provide rather than focusing on the name.
>
> It sounds like bureaucracy. It's a mouthful. I think they've changed acronyms multiple times and we all as industry keep forgetting what they are called. It doesn't sound agile and nimble. I serve an emerging and innovative sector and I want to come across as somewhat nimble.
>
> [suggests renaming to] Trade enablement or Trade facilitation. Something to give a little bit more vision in that statement.

TCS responsiveness

Participants were asked if they would reach out to the TCS if they were experiencing a crisis requiring an immediate solution. A few participants said that they have accessed the TCS in a critical situation for advice and direction, for example, to find support when a customer did not make payment on invoices. Some others, mostly comprising those who are satisfied with their service from TCS, said that they would reach out to the TCS if they needed assistance in a crisis. These participants felt that their relationship with a Trade Commissioner would lead to timely support, or they generally feel that the TCS would be responsive. About half said that they would not reach out to the TCS in a crisis situation, as they do not believe they would receive a timely response or information they could not obtain from other sources:

> We had one situation like that in [market] where a customer was not paying. TCS couldn't get involved in getting this to court but provided a list of 20 different lawyers that we could reach out to.
>
> I would certainly approach them. When they took a bit more time to respond, or get an output, that isn't necessarily reflective of how they work. If there was something clearly written as urgent, I'm sure they would [respond timely].
>
> Depends on what the crisis is. Business-wise, I think we would get good support from the TCS. They are responsive and proactive.
>
> I would not be very confident that they would be able to provide the help. It is not easy to access them.
>
> No, I wouldn't. I have legal and financial representation locally, so that would be my first point of contact for business risk.
>
> They often don't get back to me at all and if they do, it takes about a week. By that time, I've researched it myself.

TCS staff

Many participants spoke highly of the TCS staff. Staff were mostly described as professional, in terms of representing Canada in a positive manner and conducting themselves well. A few participants, particularly if they were satisfied with the TCS overall, were glowing in their praise of staff, with descriptions such as “fantastic” and “superstar”:

> They are able to present themselves in a very practical and business-oriented fashion, with the stand of an embassy. Also, the perception that they’ve created through all the years of Canada in a positive perception.
>
> Really good interactions with each of the offices we’ve dealt with. Really personable, good knowledge and always good and follow up. Can’t speak highly enough of the quality of the people.
>
> They were knowledgeable and helpful. They followed up and tried to provide me some information.
>
> I was very impressed with the staff member I dealt with. She helped us open doors—she was a superstar.
>
> I thought the staff were fantastic. They were trying to be as helpful as they could. Particularly in trying to understand the business. They had a lot of practical questions.
>
> I can’t think of anyone who hasn’t been clutched in and eager to help and very collaborative and responsive.

Many participants said that the TCS representative(s) they interacted with asked questions to become familiar with their specific business and areas of interest internationally. Many felt that the TCS staff were often generally knowledgeable about a sector and built an understanding of their product or services within the sector, despite some participants’ caveat that their offering is very specialized or novel. A few participants mentioned that it sometimes took some time for staff to understand their business needs. These participants identified the need to be very specific with staff on what they are hoping to receive from the TCS. When needs were well communicated, TCS staff were often able to deliver the product or service to greater satisfaction:

> It’s a very particular industry. They aren’t experts, but they don’t need to be. They ask a lot of questions and that’s good. They are very talented to pull the full story together.
>
> Can’t speak highly enough of the quality of the people. It takes a little while, and we need to be clear about what we want, we usually get there within a couple of rounds.
>
> What we are selling is very niche. They knew the general information but they did a good job asking for more details. They took the time to learn a bit more, do background research and on the company itself. That was very impressive.

A few participants differentiated between any dissatisfaction with the products or service available from the TCS and the individual Trade Commissioners. These participants felt that staff may have been very polite and professional and seemed willing to help, but that the process overall was slow, bureaucratic, or that staff were not incentivised to help. Similarly, a few of these participants felt that perhaps they are not the type of business that is typically served by the TCS (too small, too new, not a priority sector), and this resulted in staff not being able to help the participant as much as they would have liked:

> They are nice people, they are very polite. They'll say they have a few ideas. And then nothing after that. But we need to have people not just sitting in cubicles filling roles, they need to be measured on outcomes.

> They are knowledgeable and experienced, it's just that they didn't help someone who is a beginner to go through it and make something of it. They didn't help me shape or implement it.

> They're very nice people in the Trade Commissioner Service, but they're bureaucrats. So, they get paid whether they work or not. They don't understand the concept of time, and time is money.

A few participants noted that there appears to be a continuous turnover of staff in some markets or in general. These participants perceive that the TCS staff are "transient" and may occupy a posting for a few years and then move on to another, or that some postings are for "development" as staff move on to other postings. Further, participants noted that this can affect service in terms of the inability to fulfil a commitment, or differing styles of management as staff come in and out of a TCS office. One participant distinguished between Canadian and local staff in a market and appreciated the continuity and knowledge of local staff:

> The local rep [in Canada] was very understanding. In [market], there was a lot of transition in the post. It was difficult for us to manage that. They helped us with one meeting, and that was kind of average. We were told that there's been a huge turnover and they weren't going to be able to support us.

> The turnover is high. They are constantly changing or at least that seems to be the case if you are not a large account. You get lost in the shuffle.

> A lot of the people in these offices are transient. They are looking at their position as a stepping-stone to something else. They are there for a period of time and want to move on to a more lucrative post.

> [Locally hired staff] tend to be a little bit more long-term. They're a little bit more familiar with their market and with the companies that we might be interested in.

A few participants felt that the quality of service can be affected by the attitudes or personalities of individuals in the position, as with any organization. Some staff are helpful and go above and beyond, while others do only what is required:

> Dealing with humans in general, one personality can be different from another personality regardless of the agency. Sometimes people will go the extra mile, and sometimes people will give you just what you ask for or be concise with their responses.

> There was no enthusiasm, absolutely zero enthusiasm on the part of the staff.

D. THE COVID-19 PANDEMIC

Business challenges

The COVID-19 pandemic affected participants' businesses in various ways, with most citing negative impacts and a few stating that challenges were minimal or their business benefited through the pandemic. Restrictions on travel were noted by many participants as an obstacle as they were not able to attend trade shows or visit customers in person for business development activities internationally.

> It was extremely difficult because we rely on travel and the world literally shut down.
>
> Travel is also sketchy—risk is higher and we don't necessarily want to travel as much anymore.
>
> We used to go to 12 of those conferences each year, and now we are down to 2. They were shut down during COVID but now it's starting to come back.

A few participants said that the transition to virtual meetings became an acceptable form of communication and relationship development for business activities. One stated that conference attendance increased due to the online delivery.

> Huge impact—there was no travel for 1.5 years. Our own conference was virtual. It was good in a way because we had participants who ordinarily would not have come [too busy] but because it was virtual it made it more accessible in a way. We normally have about 220 to 240 [attendees], but when it was virtual we had about 350.

Some participants shared that product sales have decreased over the last two to three years as a result of "destabilizing" pandemic restrictions, particularly for those in the hospitality, entertainment or education sectors that rely on in-store sales or involve in-person set up and delivery. Further, a few felt that general uncertainty during the pandemic either made customers resistant to committing to purchases or they experienced a change in buying behaviour:

> Things have been really, really tough for us the last three years, and right now we're in a really tough situation. We're just trying to figure out what we can do to increase our sales. Like I said, we're a small company and we have small marketing budgets.
>
> The education sector was heavily impacted, and most projects came to a halt.
>
> It's pretty bad. COVID slowed down our [business] development significantly. [It] caused uncertainty in the beginning. Two years were a complete write-off from our perspective.
>
> All of my clients are international. My revenue for 2020 was down 50% compared to the previous year, and in 2021 my revenue was down 65% compared to the baseline. Business volume in my consulting business was down because no one was focusing. Everything was shut down, and their priorities were in different directions.

For participants whose businesses sell physical products, the impacts of the pandemic on the supply chain was a notable issue. These participants indicated that they experienced delays from suppliers, reductions in inventory resulting in uncertainty and increased costs, and production delays due to components not being delivered. Some participants said that pandemic restrictions resulted in changes to labour supply and increased costs to attract and retain labour. Inflation and general "increased costs" were also identified as a challenge that has resulted from disruptions due to the pandemic:

> There were inflation and supply issues. Costs were going up with suppliers and there were always delays of things that could not be delivered.
>
> There were shipping delays and increased costs for sure everywhere. Port congestion and inability to get bookings was the issue. I can't even sell in Europe. By the time I add the shipping costs the buyers say the price is too high.
>
> I used to be the business development guy, and now I'm the supply chain guy.
>
> Our salaries are about 50% higher than pre-COVID. We've done quarterly salary updates just to try to hang on and retain people. We had to push our rates [higher].
>
> Expectations for hourly wages are also higher.

For a few, the timing of the pandemic had an impact on their business. For example, two participants said they had just completed their research and development phase and were ready to launch their physical products when the pandemic began. They were henceforth unable to go to trade shows or meet with potential distributors and now have severe cash flow challenges. Conversely, another said that they had just started their business with several employees and all were able to work remotely on product development during the pandemic as they were not yet ready to sell internationally:

> COVID was a big challenge. We started with research and did two years of research and spent all our money and we had [potential customers], but then with COVID we had to stop.
>
> We only started to sell internationally just before the pandemic so everything changed. All communication just stopped and there were shutdowns everywhere and no one could travel.

Mitigation strategy

Participants noted several mitigation strategies they used to meet the unanticipated challenges brought on by the pandemic. Some, particularly those offering services, said they were able to transition to a remote work environment and continue business activities during the pandemic. Most of these participants indicated that their workforce continues to operate primarily remotely. Beyond the first few weeks of isolation and shutdowns in the early part of the pandemic, these participants were able to continue productively. Still, a few note that working remotely has allowed them to continue business activities, but has changed the culture of the business and the ability to meet and collaborate informally:

> We work in an industry where people don't need to be physically co-located. About 10% come to the office now. Our industry dramatically shifted in a way that's tough to reconcile to maintain the culture.
>
> We were not too badly affected. We were already using a hybrid in-person and virtual model in our way of working. There was less dynamic collaboration and idea generation I think, so that was less positive, but we were already set up with the tech and so on.
>
> As a tech company we were able to work remotely. The silver lining is that everyone's become more accustomed to the idea of virtual engagement and it feels normal to people.
>
> We have a small staff of 12 and we were already accustomed to working in a virtual environment, which was very helpful for us during the pandemic.
>
> The culture of [doing online video meetings] has changed. The stigma of working from home has changed.

Some participants said that they adapted their business model during the pandemic to mitigate challenges. This included several approaches such as the development of, or increased focus on, an online platform for direct sales and advertising online or through social media. A few pivoted to other unplanned strategies such as selling their intellectual property rather than manufacturing the physical product, buying a small company in another market to increase revenue, or generally focusing on new markets to follow opportunities. A few said that they responded to supply chain issues by making bulk purchases to ensure they have necessary supplies, or changed suppliers to those that can deliver the products more reliably or of better quality:

> I was already online so selling more online was an easy continuation, even though my in-person sales took a bit of a hit.
>
> But we have learned some new ways of reaching audiences, particularly new audiences, digitally so this has forced us to explore new audiences and how to reach them.
>
> We are less dependent on bricks and mortars that are dependent on traffic into their stores.
>
> We had to do something to pay the bills though so we bought a […] manufacturing company in the U.S. and kept the lights on that way for a few years. We've just shelved it but for a time it helped us pay for our project development efforts.
>
> We have done a lot more on Amazon online sales, so opening different channels. We are usually direct to wholesale, but now we are direct to customer and expanded into other markets that we weren't in before and tried to diversify revenue streams.
>
> We have had to make bulk buys and do more advance planning to ensure we have what we need.

In response to supply chain issues and increased costs of supplies or labour, a few businesses focused on maintaining and promoting the quality of their product or service in their sales activities:

> I have to get the message out about quality.
>
> Trying very hard to find clients who can bear our rates and diversify into new markets.

A few participants, notably more established businesses, said that they used the time during the pandemic to have employees work on other business activities, such as investing in new internal systems or into product development.

> From a commercial standpoint, the P&L [profit and loss] suffered, but we knew this was temporary. We reallocated resources into research and development. We invested in a new ERP [enterprise resource planning] system while there was less transactions and orders coming in. Instead of layoffs, we invested in projects in the medium term.
>
> We also took advantage of the time we had to upgrade our technology and revamp a bit. We are ahead of the curve, state of the art in the industry, so we need to stay that way.

Recovery

Only a few participants who experienced challenges through the pandemic have fully recovered, and a few anticipate that they will soon recover. Participants representing businesses that offered a service appeared to be more nimble to adapt to an online delivery and sales strategy, while those with physical products felt the effects of increased costs and supply chain issues to a greater extent:

> I am in the process of recovering, as well as re-evaluating my business strategy.
>
> Catching up now though, so may only be another year or so before we are back to where we were.
>
> We are in a recovering phase. All our money goes to research and product development. There is a lot of interest, so what we have spent on research might have paid off.
>
> We fared better than others because almost all our sales are exports. We were still able to sell to people in locations that were not as harshly locked down.
>
> Yes, we've fully recovered and we are actually doing more business than we were pre-COVID because so many things changed during COVID, the shift to virtual.

Some participants said their "small business" has not recovered and anticipate continued challenges to achieve or regain revenue to expected levels. These small businesses, with few employees or lower revenue, tended to have had to use personal financing to keep the company operational or even take on a second job:

> No, absolutely not. We are definitely treading water and crossing our fingers.
>
> I'm in massive debt to be quite honest. Personal debt and company dept.
>
> I put a second mortgage on my house and paying 9.9 per cent interest.
>
> It's just opening up now. I haven't had any income for 3 years so I want to get back to it. I want to retire!
>
> We are still having issues. Supply chain is still problematic, and inflation is making it hard. I have had to take a job separate from the company just to make ends meet, pay the bills and pay back the loan. The impact of the pandemic on small companies is huge, and many do not recognize this.

E. ANTICIPATED FUTURE CHALLENGES

In the next five years, participants anticipate a number of challenges. Some are concerned about an economic downturn, inflation, higher interest rates or currency stability. Participants are concerned about “higher costs” generally due to this combination of factors. A few said that they are experiencing the effects of a “global economic slowdown”, with examples of instability in the Latin American market, or concerns that the war in Ukraine will continue to have a negative economic impact in European countries, in part due to increased energy prices:

> Inflation and what that's doing to the market.
>
> Right now, the clouds are gathering. The war is affecting the Italian and Germany economies. That’s something that’s not usually perceived on the other [North American] side of the ocean.
>
> We’re already feeling the effects of the global economic slowdown with projects and financing being put on hold.

Some participants indicated that they expect challenges in obtaining financing and capital in the near future to support their business activities. A few have been experiencing cash flow challenges resulting from the pandemic and the delay in product development, getting their products to customers for payment, delays in receivables, or reduced sales activities generally:

> We are in a cash crunch and looking for investors. We have a detailed growth plan but it depends on funding.
>
> [We] have financial issues with getting receivables so cash flow crunch. [We] have to carry costs for a lot longer now as well since it takes longer to produce.
>
> Our main priority now is finding financial backing for our shovel-ready projects.

Some participants predict that supply chain challenges will continue for their businesses in the next five years. These participants perceive that high costs for containers will continue along with delays in receiving materials or components for their product and delays in obtaining containers and moving their products to the market destination. This results in continued disruption for their business, and additional costs that they must absorb or pass along to their customers:

> In many countries they demand a very low price [for my product], which is not possible, particularly with shipping costs.
>
> Some are pandemic driven—we have had supply chain issues such as delays, like everyone. We have had equipment that is to come from India. There are delays and increased freight costs.
>
> Supply chain. Getting the stuff made and shipping itself. I’ve heard that people are anticipating big delays in logistics worldwide because a number of transport ships in the Pacific need to be decommissioned because the United Nations emissions standards have changed.

A few participants cited labour cost and availability as a continued challenge in the next five years. Wage expectations have become "unrealistic", according to these participants, and the competition for human resources is high. This was noted as a challenge during the pandemic, and the effects continue to drive up costs and impact productivity of businesses with not enough staff to be at full capacity:

> Labour is a problem. Costs have risen, and the competition is high.

> [The labour market has] unrealistic expectations from hourly wage perspective.

> Expanding the business and supporting that in terms of increased capacity will be the big challenge. We are trying to take a smaller SME global, and that is huge. We are looking at doubling our team this year to support the demand.

A few participants anticipate challenges with protectionist policies from other markets and perceive a shift away from embracing globalization. These participants feel that more countries will be unwilling to "outsource" as many products or services, in part due to the high costs and delays in shipping, along with motivations to stimulate their own economy or be more self-sufficient generally:

> The whole push toward globalization has been attenuated somewhat. Going forward, people are going to be reluctant to follow that path as adventurously as we have in the past. With the economic outlook, I'd argue that things are going to get tighter.

> I think [with] the globalization that we've had, […] countries will be more focused on being a knowledgeable owner of the things that they do and the things that they do well. I see that globalization isn't as exotic as or "sexy" maybe as it has been for the last 15 years.

A few participants specifically mentioned challenges anticipated in expanding to a foreign market, such as building cultural knowledge, understanding regulatory requirements and avoiding corruption issues, and finding language capacity to communicate in the intended market:

> Language: We don't speak the local languages.

> Building trust through cultural alignment: That probably means finding local partners, local acquisitions.

There are challenges remaining to resume business travel, according to a few participants. These participants noted that the transition to virtual meetings has been an efficient way to engage for business development and intend to continue in this format as feasible. The increase in the cost of travel, continued flight disruptions, and the amount of time needed to conduct in-person meetings in markets were each cited as barriers to the full resumption of business travel:

> It's expensive to go places. Flights costs have increased. The hassle of flying.

> For us, we aren't planning on travelling everywhere to attend every meeting. We intend to keep our costs down by using telecommunications tools available to us.

Some participants listed general challenges expected for business development in the next five years. This includes establishing pricing strategies, concerns over market competition and saturation. Finding sales leads and identifying potential customers were mentioned by some:

> The biggest issue is market competition and saturation of the market from too many suppliers.
>
> There are no more barriers, I just need to make the contacts and get the sales landed. The market is not in Canada but there is market in the U.S., they want it.
>
> There's an increasing number of organizations that are delivering the same content.
>
> Internally, making sure we have the right pricing.
>
> For my line of work, assessing clients and their financial viability, currently in a very unstable environment due to currency shifts, finding new clients.

F. USE OF THE TCS IN THE FUTURE

Many participants said that they intend to continue to seek information or service from the TCS to support international business activities and mitigate challenges. This intention is noticeably more prevalent among those who are satisfied with the support received from the TCS. The support needed for some includes several support services when entering new markets, such as market intelligence, information on compliance and cultural issues, as well as introductions. A few are interested in specific support from one of the TCS services, such as trade missions, CanExport funding, or vetting an organization in a market:

> As we start projects in each country, I'm going to make contact with the Trade Commission Office. That's the first government agency that I will reach out to.
>
> The TCS is always a touch point because I know they have a pretty significant amount of resources that we can lean on.
>
> There will be an ongoing relationship with TCS and we'll be needing help from Trade Commissioners. They are good with getting the local market insights, connecting us with key players. And it's vetted. Less risk for me and less stressful. It doesn't guarantee that it's going to work out [the business opportunity], but there's less risk for me.
>
> I believe so. We do want to get ourselves involved in the CanExport program, because we always want to be as capital-efficient as we can.
>
> That makes a lot of sense. I have relationships with some of the commissioners in some target markets. The targeted "ask" is, find me smaller firms like me that already have relationships with customers I'm targeting.

A few participants said that they may reach out to the TCS, but would like support in service areas that they say is currently unavailable. This includes establishing a priority for businesses in emerging sectors or products to help gain the most traction in international markets, and promoting Canadian businesses within markets. A few said they would reach out again if they were assured that their own sector or business size was a priority for the TCS. A few anticipate using the TCS if there was greater follow up on the TCS services provided or a "white glove service" where the TCS provides holistic support to the business rather than responding to inquiries from the business:

> There are so many challenges that we need them [the TCS] more than ever now. But, it has to be even more strategic and targeted, and useful than ever before. Again, it can't be all things to all people or it ends up being nothing to anyone. We need them to [help us] build networks and new relationships.
>
> We [Canadians] are really resourceful people and we are a nation of entrepreneurs, and we do some cool things. I would love to see the Trade Commission look at what some of the emerging things are that Canada is working on right now that are really relevant around the world.

> We should be a perfect fit for what TCS is about. There should be a manager for our type of company that “hand holds” us. A white glove service, as being a benefit to Canada, where they help navigate through markets.
>
> It is always helpful for TCS to help with contacts, but they need to learn from those who are doing this well and putting in the effort to make sure the relationship is being properly established in order for it to result in any actual match that is likely to have a good outcome.

Among those who are not satisfied with the service they received from the TCS, some participants said that they do not plan to reach out to the TCS again for support, or will contact the TCS for information or services but do not expect the support to be useful:

> Of course, I’m very open. I may need them. But my perception is that, Trade Commissioners might not be the right path for me.
>
> I won’t call the TCS again. They’ve never helped me. They offer everything but deliver nothing.
>
> My gut tells me that the TCS can’t help, based on what I’ve seen so far. I’d like to be surprised, and it would be great if they could provide better information and strategic advice, but I doubt it. Not unless [we] were a priority and I don’t think we are.
>
> Will then reach out to seek support from the Trade Commissioners. We aren’t going to bet the farm on TCS doing it for us. But we do see that as a tool in the bag. I don’t think it’s reasonable to hope for anything more.

CONCLUSIONS

Obstacles & needs

Interviews with participants revealed that the COVID-19 pandemic was devastating for some businesses, particularly smaller businesses, and those preparing to launch their product or service after spending time and money on development leading to the start of the pandemic. Clients anticipate continued challenges due to global economic challenges, higher costs, challenges related to supply of some products and equipment as well as labour and a reluctance to resume travel to pre-pandemic levels. Financial pressures were also noted by some, particularly smaller businesses.

Survey results also highlight a number of key obstacles that at least half of TCS clients are facing. These results, however, mask significantly greater pressures felt by some segments. **Lack of market contacts and information about international business opportunities** are the most often noted obstacles in doing business internationally. It is considerably more prominent, however, among those preparing to export and the smallest companies, often owned by women and visible minorities.

Lack of financing is also a significant obstacle for half of clients, but much more often registered by the smallest companies, those owned by women and visible minorities, as well as in the arts and cultural industries sector. It is these same segments that report financing and cash flow to be among their most significant challenges as they negotiate their recovery pathway. While locating financing is a need noted by a lower proportion of clients overall (about half), the need has increased somewhat since 2019 and is registered by as many as seven in 10 of the smallest companies, those owned by women and visible minorities, as well as in the arts and cultural industries sector.

Uncertainty about regulatory requirements in foreign countries is also one of the three most often noted obstacles in the survey, reported significantly more often among those operating in the agriculture and processed foods sector. While trade barriers are noted by fewer clients overall, it is again in the agriculture and processed foods sector where it is noted most often.

Survey results also indicate a strong corresponding need for **information on companies in foreign markets**, market intelligence and referrals to business opportunities.

Interview participants have looked to the TCS for support in several key areas, including identifying contacts, market intelligence, and information on the market landscape, and guidance on financial assistance and available funding. Providing contacts, making connections and supporting introductions were considered the most helpful service, along with supporting an understanding of the business culture and regulatory requirements in a market.

Satisfaction

Survey results show a high degree of satisfaction with TCS services, although one in six did not indicate satisfaction. As with obstacles and needs, lack of satisfaction is more pronounced in some segments. This includes SMEs and the agriculture and processed foods sector, but is most pronounced among companies located in the Prairies and those targeting their efforts in Africa and the Middle East.

Similarly, while overall satisfaction as well as likelihood of using the services in the future or recommending the TCS are high, other indicators of satisfaction are somewhat weaker. Nearly eight in ten clients agree that they received contacts that were the right people and a consistent quality of service. However, just under three in four said the information was useful while fewer than seven in ten said the TCS helped them solve a problem. In each case, about one in five clients or more do not believe the TCS provided this assistance. Less positive experiences are more concentrated in the Oil & Gas, the Information & Communications Technology and responsive sectors.

Interview participants felt they were best served once they had established a relationship with a Trade Commissioner and when the service was comprehensive, proactive, entailed sector-specific and customized information, and when it included follow-up on the service. Interview participants would like to see greater responsiveness and consistency. Participants often perceived that limitations in the service provided may be related to the size of their own business or their sector not being a priority of the TCS, engagement levels varying among TCS staff, or the general bureaucratic process of the TCS.

Outcomes

Perhaps even more than the segments of clients who are not completely satisfied, survey results point to more modest evidence of concrete outcomes. About half to six in ten clients believe the assistance of the TCS yielded market intelligence or contacts they would not have found otherwise, or gave them the knowledge to expand their market, to better understand the competitive environment or to support decision making. Between three in ten and nearly half said the assistance of the TCS made a moderate or greater contribution in any one of a number of key areas, with just over half noting a contribution in the removal of a market barrier.

Interview participants are largely aware of other organizations, and some have accessed these for support, including the EDC and BDC, other federal or provincial services, and private organizations. Clients are typically not reliant on any organization for support, with no one organization fulfilling their needs. These businesses appreciate the presence of the TCS in other markets and the credible presence of the federal government to support introductions.

Overall

Study results highlight the considerable extent to which TCS clients are facing a number of barriers, particularly in the wake of the pandemic. Resulting needs for information and support that will assist them in conducting international business are also high, along with appreciation for the value in the type of services provided by the TCS. Many clients are looking to the TCS, along with other organizations, for assistance in a wide range of areas, most critically in supporting successful connections and in providing relevant and sector-specific market intelligence and useful information about business cultures in foreign markets. Responsive, customized and well-informed information, along with strategic advice and guidance are described as critical for many as they negotiate their recovery pathway in the currently unstable post-pandemic environment.

Interview participants emphasized that these ongoing challenges and the difficulties experienced during the pandemic increase the importance and value of the services provided by the TCS, but also make it critical that services are consistent, timely and as sector-specific as possible to maximize the usefulness to businesses, many of whom are operating under greater financial strain and uncertainty in a post-pandemic world.

APPENDICES

A. METHODOLOGICAL DETAILS

Two phases of research were conducted to deliver on the objectives: an initial phase of survey research, followed by key informant interviews with 41 clients who answered the survey.

Quantitative Methodology

The survey research was conducted among a sample of n=2,978 clients of the TCS who were identified through a contact list maintained by the TCS. The survey required 15 minutes to complete. (on average) and were conducted between November and December 16, 2022. A margin of error is not applicable since a census of all members of the population was attempted .

Survey Response Rate Calculation

The following table shows the calculation of the survey response rate, which uses an approach derived from the empirical calculation published by the Market Research and Intelligence Association (MRIA).

Table 10: Online response rate calculation

Response Rate Calculation	24,919
Invalid address/ No email available/ Undeliverable	1,873
Unresolved (U)	**23,046**
No response/ Out of office response	18,446
In-scope - non-responding (IS)	**1,622**
Accessed, did not respond	**759**
Qualified respondent break off	863
In-scope - Responding units (R)	**2,978**
Completed interviews	2,978
Ineligible	0
Response Rate = R/(U+IS+R)	**12.9%**

The following is a comparison of the 2022 sample with the population of clients of the TCS from August 2020 through August 2022, as well as a comparison with the survey sample collected in 2019. Comparison of the 2022 sample and TCS client population indicate no signifcant response bias.

Table 11: Comparison of sample with population and 2019 sample

Level of Referral	Answer	% (2022 Population)	Count (2022 Population)	% (2022 Sample)	Count (2022 Sample)	% (2019 Sample)	Count (2019 Sample)
Region	British Columbia	17%	4248	18%	527	17%	514
	Alberta	11%	2727	12%	350	11%	334
	Saskatchewan	3%	733	3%	83	2%	56
	Manitoba	3%	685	3%	100	3%	78
	Ontario	35%	8685	34%	1013	34%	1014
	Quebec	18%	4539	18%	530	18%	531
	New Brunswick	2%	497	2%	55	2%	58
	Nova Scotia	4%	980	4%	120	4%	131
	Newfoundland & Labrador	1%	326	1%	40	1%	44
	P.E.I.	1%	137	1%	20	1%	18
	Northwest Territories	0%	10	0%	1	0%	4
	Yukon	0%	36	0%	2	0%	1
	Nunavut	0%	5	0%	1	0%	--
	Outside Canada	5%	1311	5%	136	6%	180
Organization Type	SME	79%	19725	79%	2365	75%	2222
	Large	12%	2882	12%	350	15%	435
	Partner	8%	2101	8%	234	8%	232
	Unspecified	1%	211	1%	29	2%	74
TCS Services	Problem Solving	5%	1352	7%	195	5%	150
	Qualified contacts	42%	10365	42%	1244	38%	1121
	Market potential assessment	23%	5790	22%	667	21%	627
	Prep for international markets	21%	5137	20%	607	13%	392
	Additional service	9%	2275	9%	265	7%	199
TCS Business Line	International Bus Development	92%	22926	93%	2757	92%	2714
	Science, Tech. & Innovation	6%	1527	6%	184	7%	206
	Foreign Direct Inv in Canada	2%	466	1%	37	1%	43
	Trade Policy	0%	8	0%	--	0%	--

Level of Referral	Answer	% (2022 Population)	Count (2022 Population)	% (2022 Sample)	Count (2022 Sample)	% (2019 Sample)	Count (2019 Sample)
Client Business Line	Information & Communications Technology	15%	3841	15%	451	13%	399
	Agriculture & Processed Foods	11%	2801	11%	334	11%	332
	Education	10%	2606	11%	326	11%	326
	Cleantech	9%	2193	9%	267	9%	277
	Life Sciences	8%	2080	8%	251	7%	202
	Infrastr/Building Prod & Serv.	5%	1317	5%	156	6%	182
	Arts & Cultural industries	4%	1009	5%	143	3%	101
	Consumer Products	4%	989	3%	102	3%	75
	Aerospace	3%	870	3%	101	4%	104
	Oil & Gas	3%	831	3%	101	5%	158
	Defence & Security	3%	789	3%	93	3%	96
	All the others (=>3% from population)	22%	5593	22%	653	24%	713

B. SURVEY QUESTIONNAIRE

WINTRO

WEB INTRO

Thank you for your interest in completing this survey.

The survey should take approximately 15 minutes to complete. If you begin the survey and find you need to come back later to complete it, you may re-open the link provided below at a later time and pick the survey up where you left off. Si vous préférez répondre au sondage en français, veuillez cliquer sur français. NOTE: Once all the responses have been tabulated, you will be able to review the aggregate results of the survey at the following website: https://www.tradecommissioner.gc.ca/clientsurvey2022

QA1

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

Please choose one response

Referral from a federal government body/crown corporation	1
Referral from a provincial government body	2
Referral from another organization	3
Social media	4
Government website	5
Non-Government website	6
Third party event	7
TCS event	8
Other (please specify)	77
Don't know	99

QA2

Which of the following statements best describes your organization?

Please choose one response

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

QA2A

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

Yes, I have dealt with more than one TCS office or agent	1
No, I have only dealt with one TCS office or agent	2

QA3

For how many years has your organization done business internationally?

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

QA3A

For how many years have you personally had professional experience conducting international business?

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

PB1

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

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

B1A

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

Strongly agree	1
Somewhat agree	2
Neutral	3
Somewhat disagree	4
Strongly disagree	5

Don't know/ Not applicable	99

B1B

The market intelligence/information I received was useful

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

B1C

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

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

B1D

I have received a consistent quality of service from all of the TCS offices and agents I have dealt with

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

PC1

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

C1A

Market intelligence and information on local organizations

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

C1B

Information about organizations or companies in foreign markets

A great deal	1
Some assistance	2
Very little assistance	3
No assistance at all	4

Don't know/ Not applicable	99

C1C

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

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

C1D

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

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

C1E

Referrals to international business opportunities/sales leads

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

C1F

Referral of technology and/or R&D partnership opportunities

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

C1G

Information on locating financial/funding assistance for export-related activities

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

C1H

Recommendations on trade fairs or trade missions to attend

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

C1I

Practical advice on timing and organizing your business trip

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

C1J

Understanding responsible business practices in foreign markets

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

PC2

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

C2A

The value of the Canadian dollar

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

C2B

Canadian export taxes or permits

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

C2C

Uncertainty of regulatory requirements in other countries

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

C2D

Foreign tariffs or trade barriers

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

C2E

Discriminatory or arbitrary treatment toward Canadian investors or their investments

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

C2F

Lack of access to financing or funding

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

C2G

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

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

C2I

Linguistic or cultural obstacles

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

C2J

Labor availability and skills

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

C2K

Corruption

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

C2L

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

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

C2M

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

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

C2N

Supply chain disruptions on your **suppliers'** side

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

C2O

Supply chain disruptions on your **buyers'** side

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

C2P [0,1]

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

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

D1

Based on your interactions with the TCS, how would you rate your overall satisfaction with the service and advice provided?

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

D2

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

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

D3

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

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

D4 [1,7]

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

Please choose all that apply

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

PE1

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

E1A

Gain confidence to explore or expand in a foreign market

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

E1B

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

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

E1C

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

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

E1D

Overcome or avoid barriers to new foreign business opportunities

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

E1E

Improve our profile and credibility in foreign markets

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

E1F

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

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

E1G

Improve our marketing strategy in foreign market(s)

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

E1H

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

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

E1I

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

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

E1J

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

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

E1K

Obtain information and assistance on responsible business conduct

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

E1L

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

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

E2 [1,11]

For which of the following activities in foreign markets has your organization received assistance from TCS?

Please select all that apply

Export of goods	1
Export of services	2
New direct investment in my organization	3
Expansion of existing investment in my organization	4
Investment abroad leading to revenue	5
Partnership, joint venture or other alliance leading to revenue	6
Foreign affiliate sales	7
Licensing of technology	8
Attracting angel investors or venture capital	9
Resumption/increase in sales after removal of barrier to market access	10
None	11
Other (please specify)	77
Don't know	99

PE3

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

E3A

Export of goods

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

E3B

Export of services

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

E3C

New direct investment in my organization

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

E3D

Expansion of existing investment in my organization

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

E3E

Investment abroad leading to revenue

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

E3F

Partnership, joint venture or other alliance leading to revenue

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

E3G

Foreign affiliate sales

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

E3H

Licensing of technology

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

E3I

Attracting angel investors or venture capital

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

E3J

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

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

E3K

Other

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

F1X

Does your organization export goods and services...

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

PF1

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

Please select up to three.

Please specify (drop down list)	
Don't know	99

PF2

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

Please specify (drop down list)	
Don't know	99

PF3

How challenging do you consider each of the following issues to be, in relation to your organization's exporting activities? Please rate your view using the scale provided.

F3A

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

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

F3B

Administrative obstacles **outside of Canada** (e.g., rules, regulations and legal requirements)

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

F3C

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

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

F3D

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

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

F3E

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

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

F3F

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

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

F3G

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

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

F3H

Lack of financing/inadequate cash-flow

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

F3I

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

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

G1 [1,5]

To the best of your knowledge, does your organisation self-identify as being:

Women owned	1
Indigenous owned	2
LGBTQ2 owned	3
Visible minority owned	4
None of the above	98
Don't know/Not sure	99

QH1

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

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

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

QH2

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

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

QH3

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

Less than $1 million	1
$1 million to less than $5 million	2
$5 million to less than $25 million	3
$25 million to less than $100 million	4
$100 million to less than $500 million	5
$500 million to less than $1 billion	6
More than $1 billion	7

Not applicable	97
Decline	98
Don't know	99

I1

As part of this research, we are interviewing a few randomly selected respondents. The interviews would be conducted using a video call platform, by video or by audio only. It would take about 30 to 45 minutes to complete and we would provide an incentive of $150 as a thank you for your participation. Anonymized interview transcripts would be provided to Global Affairs Canada. Would you be willing to participate in an interview?

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

THNK

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

C. Interview Email Invitation

Subject: Scheduling an interview regarding the Trade Commissioner Service (TCS)

Dear <name>

You recently completed a survey of clients and partners who received service from Global Affairs Canada's Trade Commissioner Service (TCS). between August 1, 2020 and July 31, 2022 at one of their Embassies or High Commissions abroad, or a Regional Office in Canada. In that survey, you expressed a willingness to conduct an interview with EKOS Research Associates about the TCS. These interviews are being conducted in order to better understand the needs and challenges faced by Canadian companies seeking to do business internationally, as well as the way in which services provided by the TCS did or did not assist you in these endeavours.

Your participation in this study is completely voluntary. Your responses will be kept strictly confidential, with nothing to identify you in the aggregate report and will not affect any current or future interaction with the TCS. With your permission, this interview will be audio/video recorded for the purposes of accuracy in reviewing and creating notes for analysis. An anonymized transcript of the interview will also be made available to the TCS.

We are offering $150 to organizations for participation in this interview. **Please use the button below to schedule an interview at a time that is convenient for you between <dates >.** You will receive a follow-up confirmation email with meeting link for the interview.

If you have any questions about the study you can contact us at TCS-Interviews@ekos.com, or contact Global Affairs Canada directly at TCSsurvey-sondageSDC@international.gc.ca.

Your participation is greatly appreciated!

SCHEDULE INTERVIEW BUTTON

Best regards,
Susan Galley
Project Manager, EKOS Research Associates
DO NOT REPLY directly to this email

D. INTERVIEW GUIDE

Hello, my name is____________ with EKOS Research Associates. Global Affairs Canada (GAC) has commissioned EKOS Research Associates Inc. to conduct a series of interviews with representatives of Canadian clients and partners who received service from the Canadian Trade Commissioner Service (TCS) between August 1, 2020 to July 31, 2022. This research will help GAC better understand the needs and challenges faced by Canadian companies seeking to do business internationally, include current challenges and obstacles when exporting, and other related issues.

Thank you for your participation in the survey you recently completed. You indicated at that time that you would be willing to conduct a more in-depth interview to further discuss how the TCS is working for you and where it might improve to better help Canadian companies succeed internationally. The interview will take about 30 to 45 minutes. Your participation in this study is completely voluntary. Your responses will be kept strictly confidential, with nothing to identify you in the aggregate report and will not affect any current or future interaction with the TCS. With your permission, this interview will be audio/video recorded for the purposes of accuracy in reviewing and creating notes for analysis. An anonymized transcript of the interview will also be made available to the TCS.

Do you have any questions before we begin?

Section A: Opening

Let's start with a little background on your organization:

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

Section B: Past Experience with TCS

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

- How long ago was it?
- Did you get the service or information you needed to help support your international business objectives?
- Was the experience positive or negative? Why?

- How does your last experience with TCS compare to your typical experience with them? Better or worse? Why?

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

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

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

- Please describe…
- Are there things TCS offers, but which you have found to not meet your needs?
- Are there things that TCS should be offering, but doesn't?
- If you had a crisis situation requiring a solution fast, would you approach TCS or not? Why? /Why not?

Section C: Challenges

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

- PROBES:
  - The value of the Canadian dollar
  - Canadian export taxes or permits
  - Uncertainty of regulatory requirements in other countries
  - Known foreign tariffs or trade barriers
  - Discriminatory or arbitrary treatment toward Canadian investors or their investments
  - Lack of access to financing or funding
  - Concern of violation of your patents and/or intellectual property rights
  - Linguistic or cultural obstacles
  - Labour availability and skills
  - Corruption
  - Lack of information about international business opportunities
  - Lack of market contacts such as potential buyers and partners, technology sources, agents, etc.

- Are these areas where TCS currently provides you with information/service? IF NOT: Should they be providing information or service in these areas? Other areas?

As we know COVID brought its own set of challenges to the private sector.
Tell us a bit more about the impact on your organization, mitigation strategy and recovery.

- PROBES
  - Supply chains impact and mitigation strategy
    - Contemplating reshoring?
  - Inflation impact and mitigation strategy
    - Rising price of inputs

Would you say you have fully recovered from it and what were the key factors to a recovery?

- PROBES
  - Key factors to recovery
  - Key remaining obstacles
  - Did the TCS play or could play a role in your recovery?

Section D: The TCS Brand

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

  - Were they knowledgeable?
  - Experienced?
  - Professional?
  - Helpful?
  - Did they seem to understand your issues?

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

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

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

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

How about the name: Trade Commissioner Service; Does it represent who they are and what they do in your opinion?

- Why/Why not?
- Is there an alternative name you would suggest that would describe what they do better or more clearly than TCS does?

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.