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2025 Trade Commissioner Service Comprehensive Client Opinion Research

Final report

Prepared for Global Affairs Canada

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Executive Summary

Background, research purpose 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, and innovation. With offices across Canada and its presence in more than 160 cities worldwide, the TCS helps thousands of businesses each year. The TCS also works with partner organizations, such as provincial and municipal governments and industry associations, that deliver programs and services to Canadian businesses.

The TCS has been conducting client satisfaction research since 1999. The TCS commissioned Abacus Data to conduct the fifth client satisfaction survey using both quantitative and qualitative research methods.

Objectives

The overall objectives of this research are to:

- Determine business success of TCS clients/partners and the extent to which TCS contributes to reported outcomes.
- Identify and validate drivers of service quality and clients' commercial outcomes.
- Assess the effectiveness and relevance of four key TCS services: Market Potential Assessment; Preparation for International Markets; Problem Solving; Qualified Contacts.
- Gain insights into ongoing issues in the current trade environment.
- Understanding client needs within the current global business context, including the impact of the disruption in the global economic environment specifically as it relates to jobs and market diversification; and
- Detailing client perceptions of TCS services and measuring the effectiveness and relevance of TCS services to their realities.

Use of the Results

The results will be used by TCS to identify opportunities for improvements in the way they deliver services.

Methodology

The 2025 TCS comprehensive client opinion research employed a mixed-methods design consisting of a quantitative online follow-up surveys and a qualitative phase of key informant interviews. The quantitative phase involved a short (5-question) follow-up survey conducted among clients who completed the 2024 TCS Comprehensive Client Survey (n = 2,414), with a total of 645 respondents participating in the 2025 follow-up survey, and was conducted between December 1, 2025 and January 18, 2026.

The qualitative phase consisted of 30 key informant interviews conducted by video conference using the Recollective Platform with clients who consented to participate via the 2024 and/or 2025 survey. These interviews were conducted between December 15, 2025 and March 12, 2026.

All research activities complied with the **Standards for the Conduct of Government of Canada Public Opinion Research** for online surveys and qualitative research. All data were collected, processed, and stored on Canadian servers. Transparent communication regarding any use of artificial intelligence in research processes was included, in accordance with Government of Canada requirements.

Extrapolating the Quantitative Results to a Broader Audience

The 2025 follow-up TCS survey targeted those who completed the 2024 TCS Comprehensive Client Survey. As this survey was not based on a probability sampling design, a margin of error is not applicable. While the distribution of respondents across key variables (e.g., region, organization type) is broadly consistent with the 2024 respondent population, the results cannot be generalized to the broader TCS client population. Response bias may be present, particularly given that participation was limited to a cohort of previous survey respondents.

Extrapolating the Qualitative Results to a Broader Audience

Please note that the findings from the qualitative research cannot be inferred to, and are not representative of, any wider population than those who participated.

Key findings

Key findings from the Quantitative (Survey)

Market Pivot

Of 645 respondents to the 2025 follow-up survey, most are actively engaged in international business. Nearly two-thirds (n=398, 62%) export to both the United States and other foreign markets, while 16% (n=104) export to foreign markets excluding the United States and 6% (n=37) export exclusively to the United States. A further 13% (n=83) are not currently exporting but plan to engage in international business. Export patterns are broadly consistent across regions and client types, but vary by international experience and sector, with more experienced organizations more likely to export broadly and less experienced organizations more likely to be planning international activity.

Jobs Pivot

About one-third of organizations (n=205, 32%) report an increase in employment as a result of new international business supported by the TCS, with most increases being nominal (1–5 employees). The majority (n=388, 60%) report no change in employment levels, and relatively few (n=52, 8%) report a decrease. Employment impacts are generally consistent across regions, sectors, and ownership groups, though small and medium-sized enterprises are more likely to report modest increases and large organizations are more likely to report significant decreases, though these findings are limited to a small sample size.

Activity Pivot (responses to the global economic landscape)

Organizations report actively adapting their international activities in response to changes in the global economic landscape, with a strong emphasis on diversification and partnerships. Nearly three-quarters (n=473, 73%) have explored exporting to new foreign markets, and about half (n=312, 48%) have sought research and development or technology partnership opportunities. More than two in five have exported to new foreign markets (n=274, 42%) or engaged in partnerships or joint ventures with a foreign organization (n=265, 41%). Foreign investment-related activities are less common but still notable, with about one-third (n=197, 31%) exploring foreign investment opportunities and one in five (n=126, 20%) actively soliciting foreign investment.

Region Activity Pivot (where organizations are looking next)

Europe is the most commonly cited region organizations are pursuing or anticipate pursuing (n=343, 53%) as a result of changes in the global economic landscape. Europe is then followed by Southeast Asia and Oceania (n=230, 36%), the Middle East (n=227, 35%), South America (n=208, 32%), and North America (n=200, 31%), indicating broad diversification across both established and emerging markets. Interest is also evident in South Asia, Central America, Eastern Europe and Eurasia, and the Nordic countries, with fewer organizations targeting Africa, the Caribbean, or the Maghreb. Overall, regional diversification patterns are broadly consistent across regions, sectors, experience levels, and ownership groups.

Demand for TCS support (what help organizations need most)

Organizations report high demand for assistance across the international business lifecycle. The greatest needs are for referrals to international business opportunities or sales leads (n=556, 86%), information about organizations or companies in foreign markets (n=535, 83%), and market intelligence and information (n=525, 81%). Substantial proportions also report needing support with trade fairs and missions (n=481, 75%), understanding trade agreements (n=448, 69%), responsible business practices (n=419, 65%), funding (n=397, 62%), market-entry preparation (n=371, 58%), business travel (n=367, 57%), professional services referrals (n=347, 54%), intellectual property and regulatory issues (n=346, 54%), and technology or R&D partnerships (n=335, 52%). Across all international activities and regions, the same core needs: market intelligence, foreign market contacts, and sales leads consistently emerge as top priorities.

Key findings from the In-Depth Interview Research

Impact of the Global Economic Context

With regard to the impact of the global economic context and business environment in the U.S., most participants indicated that they were either directly affected very little by the imposition of tariffs, or not at all. Many participants indicated that either:

- they export services and/or software which are not affected by tariffs;
- their products are covered under CUSMA and thus are barely affected (business as usual);
- for some participants, their US business is a small proportion of their total international exports; and,
- some participants even claimed that they are seeing significant *improvement* in their business, because other countries also affected by tariffs seeking out Canadian suppliers to replace their US supply chain.

Notwithstanding, a few participants (Forestry, Infrastructure, Defence) say they are very adversely affected by tariffs; however, this tends to be an indirect impact on their supply chains, since their input products and/or components are in the heavily tariffed steel, aluminum and lumber industries.

Despite not being severely directly affected (as yet) by tariffs, almost all participants indicated that *uncertainty* is their key business challenge, as uncertainty is having a detrimental effect on their business decision-making. Several participants provided concrete examples of investments being cancelled or postponed indefinitely. Hiring decisions are also being postponed, although no *participants* indicated that they laid-off staff.

It is important to note that only one participant (partner in the lumber supply chain) indicated that there has been loss of employment due to lumber mill closures, and a few others have postponed hiring due to the uncertainty. A few participants were either preparing or have already invested in manufacturing operations in the U.S.

Most participants also indicated they are now successfully marketing to new non-US markets, especially Europe and Asia, and/or they have concrete opportunities to do so.

Relationship with the TCS

The large majority of participants indicated they are very satisfied with their relationship with the TCS. All of the participants have been working with the TCS since at least prior to COVID, and many have relationships extending back as far as 10, 15 and even 25 years.

Almost all participants value the services of the TCS very highly, with key benefits mentioned including market intelligence (not available through secondary sources), facilitating in-market contacts, and most of all (especially for SMEs) the credibility of the Government of Canada. Almost all participants provided anecdotes of concrete new international business obtained through the services provided by the TCS.

That being said, a few of the participants indicated they had less satisfactory experiences with the TCS, mostly due to a lack of responsiveness and "*being ghosted*", even though they had proven themselves as successful exporters. There was also some who indicated that there was a lack of technical knowledge of their specific sector or product, which although understandable, was more time consuming for the client.

TCS Services Used and Value Provided

Clients reported using a broad range of TCS services, often sequentially and in combination. **Market intelligence** was among the most frequently cited services, particularly during early-stage market exploration. Participants valued **insight that went beyond publicly available information**, especially intelligence grounded in local business practice.

In addition**, partner identification and introductions** were also consistently described as high-value services. Clients emphasized that the **credibility of TCS-facilitated introductions** often led to more productive conversations.

With regard to interactions with trade commissioners, **professionalism** was one of the most consistently cited as one of their key strengths. Participants frequently described interactions as well-organized, respectful, and efficient, particularly in formal settings such as trade missions, government-to-business meetings, and introductions to foreign partners. Also, **responsiveness** emerged as a critical factor shaping client perceptions, particularly during periods of uncertainty or disruption. Many participants recalled situations where timely responses made a tangible difference to decision-making.

Digital Services and the Human Element

Across interviews, participants generally recognized and appreciated the increasing use of digital tools and services by the Trade Commissioner Service. Digital platforms were commonly described as useful entry points—particularly for initial information-gathering, awareness of services, and logistical coordination. At the same time, clients were clear that **digital tools were most effective when complemented by direct human interaction.**

Contract value of the POR study

The total contract value for the project was $79, 789.44 including applicable taxes.

Political Neutrality Certification

I hereby certify as a representative of Abacus Data that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy 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.

David Coletto

David Coletto, Ph.D., CAIP
Chair & CEO, Abacus Data

Oksana Kishchuk
Vice President, Insights, Abacus Data

Part 1: Detailed Quantitative Survey Findings

Methodology

This follow-up survey was conducted among a cohort of clients who completed the 2024 TCS Comprehensive Client Survey. A total of 2,414 eligible respondents were invited to participate via personalized survey links distributed by Global Affairs Canada, with data collection conducted between December 1, 2025 and January 18, 2026. The survey required an average of 5 minutes to complete and yielded 645 completed responses, corresponding to a response rate of 26.7%. No weighting was applied.

With a limited question set for the 2025 survey, demographics used for analysis are based on data from the 2024 TCS Comprehensive Client Survey. Respondent profiles were matched between surveys using a unique ID.

See Appendix A for details related to methodology, response rate calculation, and potential sources of response bias.

Extrapolating the results to a broader audience

The 2025 follow-up TCS survey targeted a census of respondents who completed the 2024 TCS Comprehensive Client Survey. As this survey was not based on a probability sampling design, a margin of error is not applicable. While the distribution of respondents across key variables (e.g., region, organization type) is broadly consistent with the 2024 respondent population, the results cannot be generalized to the broader TCS client population. Response bias may be present, particularly given that participation was limited to a cohort of previous survey respondents.

Market Pivot

Most organizations (n = 398, 62%) report exporting to the United States and other foreign markets. A further 16% (n=104) export to foreign markets other than the United States, while 6% (n=37) export exclusively to the United States. About one in eight organizations (n=83, 13%) do not currently export but plan to engage in international business in the future, and few are unsure (n=23, 4%).

Figure 1. Currently, does your organization export goods or services...

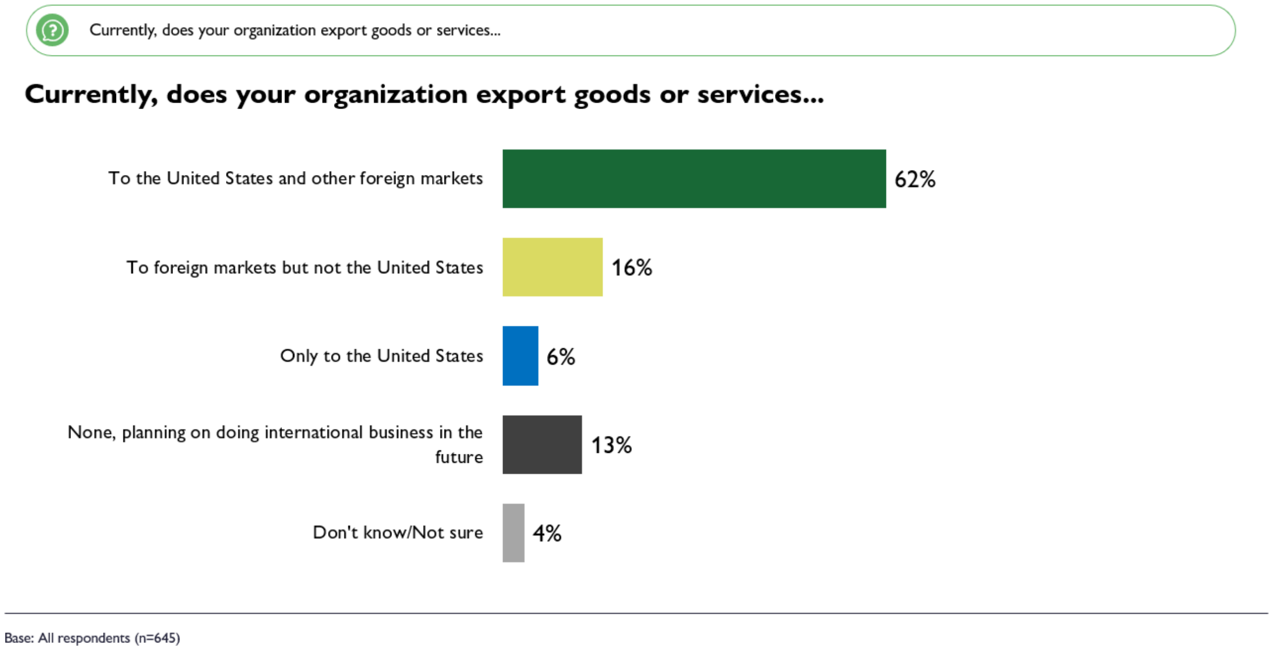


Table 1. Currently, does your organization export goods or services...

	Base (n)	% Selected
Total	(645)	-
Only to the United States	(37)	6%
To the United States and other foreign markets	(398)	62%
To foreign markets but not the United States	(104)	16%
None, planning on doing international business in the future	(83)	13%
Don’t know/Not sure	(23)	4%

Q. Currently, does your organization export goods or services...

Overall, there are no significant differences in export patterns by region or client type, suggesting broadly consistent international engagement across geographies and organizational profiles. However, differences emerge depending on years of international business experience and sector:

- Organizations with 10 or more years of experience are more likely to export to the United States and other foreign markets (n=245, 71%) and less likely to export only to the United States (n=11, 3%) or planning international business in the future (n=18, 5%).

- Organizations with 2–5 years of experience are more likely to export only to the United States (n=14, 13%) and less likely to export to both the United States and other foreign markets (n=52, 49%).
- Those with less than two years of experience are less likely to export broadly to the United States and other foreign markets (n=26, 46%) and more likely to be planning international business in the future (n=16, 28%).
- Organizations with no international experience overwhelmingly report plans to engage in international business (n=21, 75%).
- Organizations in Professional Services are more likely to export only to the United States (n=5, 22%).
- Education organizations are less likely to export to the United States and other foreign markets (n=19, 35%) and more likely to export to foreign markets excluding the United States (n=19, 35%) or to be unsure of their export status (n=10, 19%).
- Life Sciences organizations are more likely to be planning international business in the future (n=17, 34%).

Table 2. Currently, does your organization export goods or services... by Region, Client Type, Years of International Business Experience, Organization Sector and Ownership

	Base (n)	Only to the United States	To the United States and other foreign markets	To foreign markets but not the United States	None, planning on doing internatio nal business in the future	Don't know/Not sure
Total	645	6%	62%	16%	13%	4%
Region						
Atlantic	60	5%	65%	12%	13%	5%
Quebec	120	1%	62%	23%	12%	3%
Ontario	238	7%	61%	13%	14%	4%
Manitoba/Saskatchewan	32	6%	66%	9%	16%	3%
Alberta	62	10%	61%	15%	13%	2%
British Columbia	115	7%	63%	17%	10%	4%
Client Type						
Large	49	4%	53%	20%	10%	12%
SME	542	6%	63%	15%	13%	2%
Partner	80	5%	56%	24%	8%	8%
Years of International Business Experience						
< 2 years	57	9%	46%	14%	28%	4%
2-5 years	107	13%	49%	16%	19%	4%
6-10 years	101	5%	69%	17%	8%	1%

10 years +	347	3%	71%	18%	5%	3%
None, but planning in the future	28	4%	7%	4%	75%	11%
Don’t know / Not sure	5	20%	60%	0%	0%	20%
Organization Sector						
Aerospace	16	0%	88%	6%	6%	0%
Agriculture & Processed Foods	58	12%	71%	3%	12%	2%
Alcoholic Beverages	7	0%	0%	86%	14%	0%
Automotive	2	0%	100%	0%	0%	0%
Chemicals	8	13%	75%	0%	13%	0%
Clean Technologies	79	6%	61%	20%	13%	0%
Consumer Products	22	9%	73%	0%	18%	0%
Creative Industries	30	3%	67%	13%	10%	7%
Defence & Security	11	0%	45%	36%	9%	9%
Education	54	0%	35%	35%	11%	19%
Financial & Insurance Services	3	0%	33%	33%	33%	0%
Fish & Seafood	10	0%	90%	10%	0%	0%
Forestry & Wood Products	12	0%	67%	33%	0%	0%
Government	12	0%	50%	25%	8%	17%
Industrial Machinery	19	0%	95%	0%	5%	0%
Information and Communications Technologies	128	7%	70%	10%	10%	2%
Infrastructure	34	6%	71%	9%	15%	0%
Life Sciences	50	2%	54%	10%	34%	0%
Mining	25	4%	40%	28%	16%	12%
Non-Government Organization	8	13%	25%	50%	0%	13%
Ocean Technologies	9	22%	33%	33%	11%	0%
Oil and Gas	18	0%	50%	22%	28%	0%
Professional Services	23	22%	61%	17%	0%	0%
Tourism	1	0%	0%	0%	100%	0%
Transportation	6	0%	100%	0%	0%	0%
Ownership						
Women owned	110	9%	59%	11%	18%	3%
Indigenous owned	11	27%	36%	18%	18%	0%
2SLGBTQI+ owned	15	7%	60%	7%	20%	7%
Visible minority owned	76	4%	53%	22%	18%	3%
None of the above	411	6%	65%	17%	11%	2%
Don’t know / Not sure	59	2%	56%	14%	12%	17%

Q. Currently, does your organization export goods or services…

Jobs Pivot

Overall, about one-third of organizations (n=205, 32%) report an increase in the total number of employees within their organization as a result of new international business supported by the TCS. Most of these increases are nominal (n=145, 22% increased by 1–5 employees), with fewer reporting moderate (n=36, 6% increased by 5–10) or significant growth (n=24, 4% increased by more than 10). The majority of organizations (n=388, 60%) report no change in employment levels.

Relatively few organizations report a decrease in employees (n=52, 8%), with most decreases being nominal (n=29, 4% decreased by 1–5) and fewer reporting moderate decreases (n=10, 2% decreased by 5–10) or significant decreases (n=13, 2% decreased by more than 10).

Figure 2. As a result of new international business you have achieved which was supported by the TCS, has the total number of employees within your organization changed?

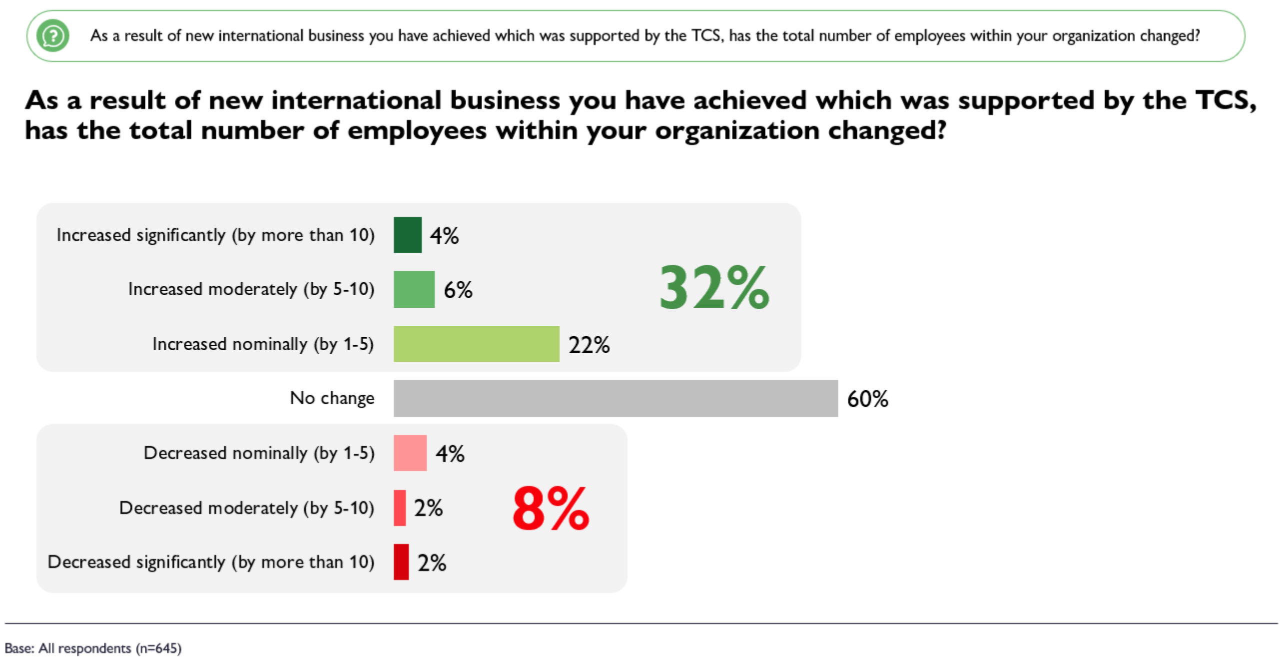


Table 3. As a result of new international business you have achieved which was supported by the TCS, has the total number of employees within your organization changed?

	Base (n)	% Selected
Total	(645)	-
NET: Increased	205	32%
Increased significantly (by more than 10)	24	4%
Increased moderately (by 5-10)	36	6%
Increased nominally (by 1-5)	145	22%
No change	388	60%
Decreased nominally (by 1-5)	29	4%
Decreased moderately (by 5-10)	10	2%
NET: Decreased	52	8%

Q. *As a result of new international business you have achieved which was supported by the TCS, has the total number of employees within your organization changed?*

Overall, employment changes remained relatively consistent by region, years of international business experience, sector, or ownership, suggesting that staffing impacts from TCS-supported international business are broadly consistent across these groups. However, differences emerge by organization size:

- Small and medium-sized organizations (SMEs) are more likely to report nominal increases in employment (1–5 employees) (n=135, 25%).
- Large organizations are more likely to report significant decreases in employment (by more than 10) (n=4, 8%).

Table 4. As a result of new international business you have achieved which was supported by the TCS, has the total number of employees within your organization changed? By Region, Client Type, Years of International Business Experience, Organization Sector and Ownership

	Base (n)	NET: Increased	No change	NET: Decreased
Total	645	32%	60%	8%
Region				
Atlantic	60	23%	67%	10%
Quebec	120	34%	60%	6%
Ontario	238	31%	60%	9%
Manitoba/Saskatchewan	32	28%	63%	9%
Alberta	62	34%	65%	2%
British Columbia	115	36%	55%	10%
Client Type				

Large	49	16%	67%	16%
SME	542	35%	57%	8%
Partner	80	24%	73%	4%
Years of International Business Experience				
< 2 years	57	44%	46%	11%
2-5 years	107	36%	58%	6%
6-10 years	101	42%	51%	7%
10 years +	347	28%	64%	8%
None, but planning in the future	28	7%	86%	7%
Don’t know / Not sure	5	0%	60%	40%
Organization Sector				
Aerospace	16	44%	50%	6%
Agriculture & Processed Foods	58	33%	60%	7%
Alcoholic Beverages	7	0%	100%	0%
Automotive	2	100%	0%	0%
Chemicals	8	25%	50%	25%
Clean Technologies	79	39%	56%	5%
Consumer Products	22	27%	59%	14%
Creative Industries	30	17%	83%	0%
Defence & Security	11	27%	73%	0%
Education	54	9%	74%	17%
Financial & Insurance Services	3	33%	67%	0%
Fish & Seafood	10	10%	80%	10%
Forestry & Wood Products	12	17%	67%	17%
Government	12	17%	83%	0%
Industrial Machinery	19	53%	37%	11%
Information and Communications Technologies	128	41%	47%	12%
Infrastructure	34	29%	68%	3%
Life Sciences	50	30%	64%	6%
Mining	25	36%	56%	8%
Non-Government Organization	8	13%	75%	13%
Ocean Technologies	9	44%	44%	11%
Oil and Gas	18	28%	72%	0%
Professional Services	23	30%	65%	4%
Tourism	1	0%	100%	0%
Transportation	6	83%	17%	0%
Ownership				
Women owned	110	32%	58%	10%

Indigenous owned	11	36%	55%	9%
2SLGBTQI+ owned	15	27%	60%	13%
Visible minority owned	76	36%	57%	8%
None of the above	411	32%	61%	8%
Don't know / Not sure	59	31%	61%	8%

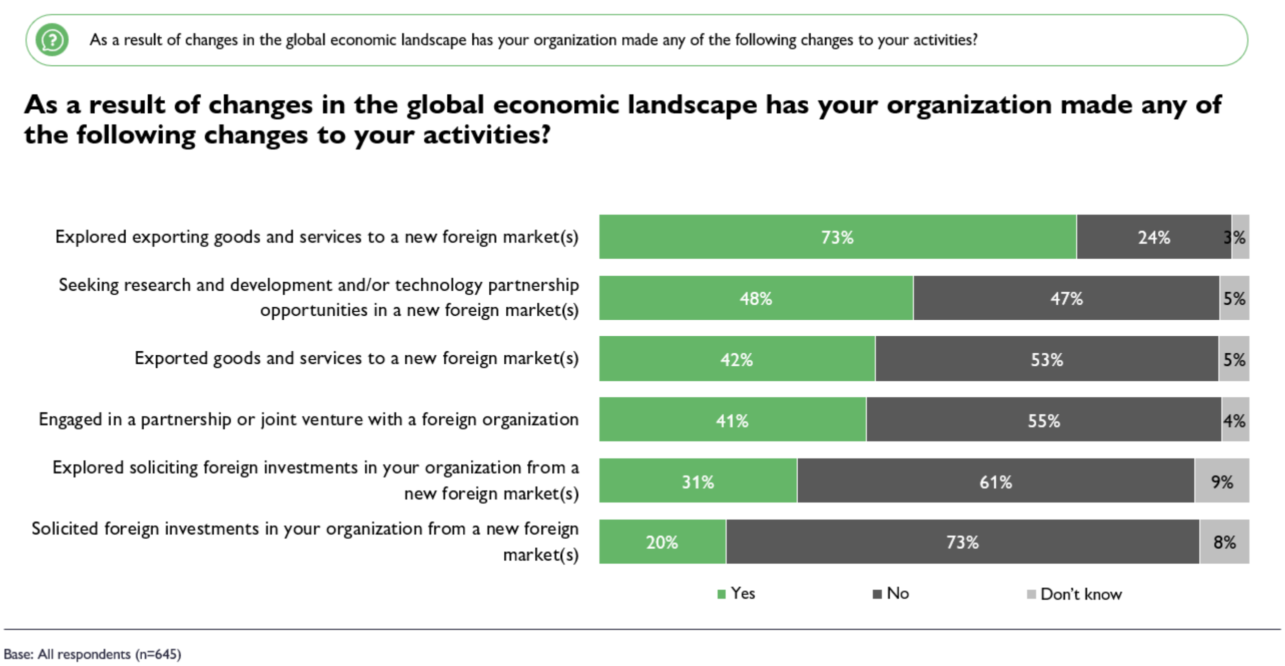
Q. As a result of new international business you have achieved which was supported by the TCS, has the total number of employees within your organization changed?

Activity Pivot

Overall, most organizations report adjusting their international activities in response to changes in the global economic landscape, with a strong emphasis on market diversification and partnership exploration. Nearly three-quarters (n=473, 73%) have explored exporting goods or services to new foreign markets. About half (n=312, 48%) have sought research and development or technology partnership opportunities in new foreign markets.

More than two in five organizations report taking concrete steps toward international expansion, with 42% (n=274) exporting goods or services to new foreign markets and 41% (n=265) engaging in partnerships or joint ventures with foreign organizations. In contrast, fewer organizations have pursued foreign investment-related activities: 31% (n=197) explored soliciting foreign investment from new foreign markets, and 20% (n=126) actively solicited foreign investment. Across activities, uncertainty remains low (3%–9%), suggesting most organizations are aware of how they have responded to global economic changes.

Figure 3. As a result of changes in the global economic landscape has your organization made any of the following changes to your activities?



Overall, differences in organizations' responses to changes in the global economic landscape are limited, with only a few subgroup variations observed across specific activities.

- Organizations in the Agriculture and Processed Foods sector are less likely to report seeking research and development or technology partnership opportunities in new foreign markets (n=14, 24%).
- Quebec-based organizations (n=66, 55%) and those with 6–10 years of international business experience (n=59, 58%) are more likely to report exporting goods and services to new foreign markets.
- Organizations in Saskatchewan and Manitoba are less likely to report engaging in partnerships or joint ventures with foreign organizations (n=4, 13%).
- With respect to foreign investment, organizations with less than two years of international business experience (n=31, 54%) and visible minority–owned organizations (n=37, 49%) are more likely to report exploring soliciting foreign investments while those with greater than 10 years of international business experience are less likely to (n=85, 24%).
- Visible minority–owned organizations (n=28, 37%) are also more likely to report actively soliciting foreign investments.

Table 5. Demographic Differences in International Business Activity Changes in Responses to the Global Economic Landscape

Explored exporting goods and services to a new foreign market(s)	
Less likely to say yes	More likely to say yes
Seeking research and development and/or technology partnership opportunities in a new foreign market(s)	
Less likely to say yes	More likely to say yes
Agricultural and Processed Foods Sector (24%)	
Exported goods and services to a new foreign market(s)	
Less likely to say yes	More likely to say yes
	Quebec (55%) Those with 6-10 years of international business experience (58%)
Engaged in a partnership or joint venture with a foreign organization	
Less likely to say yes	More likely to say yes
Saskatchewan/Manitoba (13%)	
Explored soliciting foreign investments in your organization from a new foreign market(s)	

Less likely to say yes	More likely to say yes
Those with more than 10 of international business experience (24%)	Those with less than 2 years of international business experience (54%) Visible minority owned (49%)
Solicited foreign investments in your organization from a new foreign market(s)	
Less likely to say yes	More likely to say yes
	Visible minority owned (37%)

Q. As a result of changes in the global economic landscape has your organization made any of the following changes to your activities?

Region Activity Pivot

In response to changes in the global economic landscape, organizations report pursuing or anticipating pursuing a wide range of new regions, with Europe emerging as the most commonly cited region (n=343, 53%). Interest is also strong in Southeast Asia and Oceania (n=230, 36%), the Middle East (n=227, 35%), South America (n=208, 32%), and North America (n=200, 31%), indicating broad diversification across both established and emerging markets.

Smaller but notable proportions of organizations report targeting South Asia (n=143, 22%), Central America (n=135, 21%), Eastern Europe and Eurasia (n=123, 19%), and the Nordic countries (n=113, 18%). Fewer organizations anticipate pursuing North Asia (n=83, 13%), West and Central Africa (n=77, 12%), the Caribbean (n=76, 12%), and Southern and Eastern Africa (n=73, 11%), while Maghreb (n=39, 6%) is the least cited region. Few respondents indicate they are not pursuing any new regions (n=42, 7%) or are unsure (n=18, 3%).

Figure 4. Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? Please select all that apply.

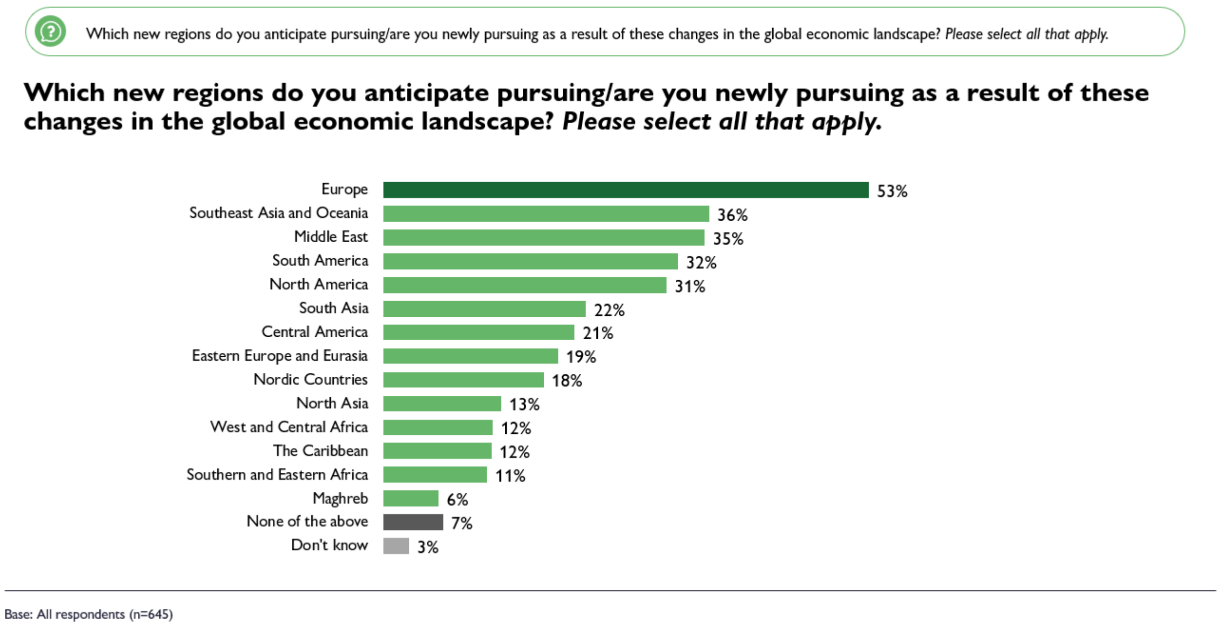


Table 6. Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? Please select all that apply.

	Base (n)	% Selected
Total	(645)	-
Europe	343	53%
Southeast Asia and Oceania	230	36%
Middle East	227	35%
South America	208	32%
North America	200	31%
South Asia	143	22%
Central America	135	21%
Eastern Europe and Eurasia	123	19%
Nordic Countries	113	18%
North Asia	83	13%
West and Central Africa	77	12%
The Caribbean	76	12%
Southern and Eastern Africa	73	11%
Maghreb	39	6%

None of the above	42	7%
Don't know	18	3%

Q. *Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? Please select all that apply.*

Overall, anticipated pursuit of new regions is largely consistent across regions, client types, years of international business experience, sectors, and ownership groups, suggesting broad alignment in how organizations are diversifying their international market focus. However, two exceptions emerge:

- Organizations in Quebec are more likely to identify the Maghreb as a target region (n=18, 15%).
- Organizations in the Education sector are more likely to identify West and Central Africa (n=15, 28%) as a target region.
- Although the differences are not statistically significant, the data show a modest shift whereby firms with fewer years of international business experience appear more likely to operate in Europe, potentially reflecting lower barriers to entry relative to other foreign markets.

Table 7. Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? Please select all that apply. ***[Part 1]***

	Base (n)	Europe	Southeast Asia and Oceania	Middle East	South America	North America	South Asia	Central America	Eastern Europe and Eurasia
Total	645	53%	36%	35%	32%	31%	22%	21%	19%
Region									
Atlantic	60	65%	28%	28%	20%	27%	22%	15%	15%
Quebec	120	62%	37%	29%	37%	34%	17%	18%	24%
Ontario	238	52%	32%	37%	35%	32%	22%	24%	18%
Manitoba/Saskatchewan	32	53%	41%	41%	25%	22%	22%	22%	28%
Alberta	62	50%	44%	44%	31%	39%	21%	16%	11%
British Columbia	115	48%	45%	35%	32%	31%	27%	24%	20%
Client Type									
Large	49	39%	35%	37%	31%	22%	33%	18%	16%
SME	542	55%	35%	35%	32%	32%	21%	21%	19%
Partner	80	54%	50%	34%	34%	31%	28%	25%	25%
Years of International Business Experience									
< 2 years	57	70%	40%	47%	23%	33%	25%	19%	14%
2-5 years	107	55%	34%	30%	36%	38%	12%	21%	14%

6-10 years	101	59%	36%	36%	32%	28%	23%	24%	19%
10 years +	347	48%	38%	37%	35%	29%	26%	22%	22%
None, but planning in the future	28	50%	14%	14%	7%	39%	11%	7%	21%
Don’t know / Not sure	5	40%	0%	20%	0%	0%	20%	0%	0%
Organization Sector									
Aerospace	16	69%	31%	44%	50%	38%	31%	25%	44%
Agriculture & Processed Foods	58	41%	40%	26%	26%	28%	24%	24%	14%
Alcoholic Beverages	7	29%	0%	29%	14%	0%	14%	14%	0%
Automotive	2	0%	0%	0%	0%	0%	0%	0%	0%
Chemicals	8	50%	13%	13%	63%	38%	0%	38%	13%
Clean Technologies	79	53%	41%	38%	35%	35%	16%	24%	14%
Consumer Products	22	59%	32%	23%	5%	18%	27%	14%	18%
Creative Industries	30	70%	43%	40%	50%	30%	27%	33%	33%
Defence & Security	11	64%	36%	45%	55%	55%	55%	18%	9%
Education	54	31%	39%	39%	37%	20%	26%	28%	24%
Financial & Insurance Services	3	33%	67%	67%	33%	33%	67%	33%	33%
Fish & Seafood	10	90%	10%	10%	0%	30%	50%	0%	10%
Forestry & Wood Products	12	67%	25%	33%	17%	8%	33%	8%	8%
Government	12	50%	42%	50%	8%	8%	17%	8%	17%
Industrial Machinery	19	47%	21%	37%	58%	37%	11%	21%	21%
Information and Comms. Tech	128	66%	44%	37%	27%	40%	25%	18%	21%
Infrastructure	34	47%	32%	29%	35%	21%	15%	21%	26%
Life Sciences	50	64%	36%	44%	24%	32%	20%	10%	20%
Mining	25	44%	16%	36%	56%	32%	16%	28%	12%
Non-Government Organization	8	38%	25%	13%	13%	25%	25%	13%	25%
Ocean Technologies	9	67%	56%	44%	33%	44%	0%	22%	33%
Oil and Gas	18	33%	39%	50%	50%	33%	17%	22%	11%
Professional Services	23	39%	9%	22%	26%	26%	17%	30%	9%
Tourism	1	0%	0%	0%	0%	100%	0%	0%	0%
Transportation	6	33%	67%	33%	33%	50%	17%	17%	17%
Ownership									
Women owned	110	60%	29%	30%	25%	28%	22%	18%	14%

Indigenous owned	11	45%	27%	36%	27%	27%	27%	18%	18%
2SLGBTQI+ owned	15	53%	20%	7%	27%	20%	20%	40%	7%
Visible minority owned	76	59%	36%	43%	29%	41%	25%	24%	14%
None of the above	411	52%	38%	36%	35%	32%	20%	21%	20%
Don’t know / Not sure	59	46%	32%	36%	34%	27%	31%	15%	27%

Q. *Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? Please select all that apply.*

Table 8. Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? Please select all that apply. ***[Part 2]***

	Base (n)	Nordic Countries	North Asia	West and Central Africa	The Caribbean	Southern and Eastern Africa	Maghreb	None of the above	Don't know
Total	645	18%	13%	12%	12%	11%	6%	7%	3%
Region									
Atlantic	60	23%	8%	5%	20%	0%	0%	3%	7%
Quebec	120	18%	9%	13%	7%	13%	15%	5%	1%
Ontario	238	15%	13%	11%	13%	11%	5%	8%	3%
Manitoba/Saskatchewan	32	16%	6%	16%	19%	19%	3%	13%	0%
Alberta	62	15%	13%	18%	10%	11%	3%	6%	2%
British Columbia	115	23%	20%	10%	10%	11%	3%	7%	3%
Client Type									
Large	49	10%	16%	16%	14%	10%	8%	4%	8%
SME	542	18%	12%	11%	11%	12%	6%	7%	2%
Partner	80	25%	19%	16%	13%	8%	8%	6%	3%
Years of International Business Experience									
< 2 years	57	18%	16%	7%	16%	4%	4%	7%	0%
2-5 years	107	14%	11%	12%	8%	7%	4%	5%	3%
6-10 years	101	27%	9%	4%	8%	14%	7%	9%	2%
10 years +	347	16%	15%	15%	14%	14%	7%	6%	3%
None, but planning in the future	28	11%	4%	7%	4%	7%	4%	7%	4%
Don’t know / Not sure	5	20%	0%	20%	20%	0%	0%	20%	0%
Organization Sector									
Aerospace	16	25%	31%	6%	6%	6%	0%	6%	0%

Agriculture & Processed Foods	58	3%	14%	7%	16%	9%	0%	14%	3%
Alcoholic Beverages	7	29%	14%	14%	0%	14%	0%	14%	14%
Automotive	2	0%	0%	0%	0%	0%	0%	100%	0%
Chemicals	8	25%	0%	38%	0%	13%	0%	0%	0%
Clean Technologies	79	16%	13%	10%	10%	11%	4%	4%	4%
Consumer Products	22	14%	9%	0%	14%	0%	5%	9%	9%
Creative Industries	30	23%	10%	20%	13%	3%	7%	3%	0%
Defence & Security	11	27%	18%	9%	9%	18%	18%	0%	0%
Education	54	17%	17%	28%	22%	11%	17%	7%	4%
Financial & Insurance Services	3	0%	0%	67%	33%	67%	33%	0%	0%
Fish & Seafood	10	10%	10%	0%	20%	0%	0%	0%	10%
Forestry & Wood Products	12	8%	33%	8%	0%	17%	8%	0%	0%
Government	12	17%	33%	17%	8%	8%	0%	0%	8%
Industrial Machinery	19	26%	11%	16%	21%	21%	11%	16%	0%
Information and Comms. Tech	128	23%	16%	6%	7%	13%	6%	5%	2%
Infrastructure	34	18%	9%	9%	26%	15%	6%	6%	0%
Life Sciences	50	18%	8%	6%	6%	10%	8%	8%	2%
Mining	25	4%	4%	20%	4%	20%	0%	0%	4%
Non-Government Organization	8	13%	13%	25%	0%	0%	0%	0%	0%
Ocean Technologies	9	67%	0%	22%	11%	0%	0%	11%	0%
Oil and Gas	18	22%	6%	28%	11%	11%	11%	0%	0%
Professional Services	23	4%	9%	9%	17%	13%	4%	13%	4%
Tourism	1	0%	0%	0%	0%	0%	0%	0%	0%
Transportation	6	33%	0%	0%	17%	17%	17%	0%	17%
Ownership									
Women owned	110	12%	9%	12%	7%	10%	2%	5%	1%
Indigenous owned	11	0%	9%	9%	9%	18%	0%	9%	0%
2SLGBTQI+ owned	15	13%	13%	0%	0%	0%	0%	20%	7%
Visible minority owned	76	11%	13%	17%	12%	11%	4%	1%	0%
None of the above	411	21%	14%	11%	13%	12%	6%	8%	3%
Don’t know / Not sure	59	15%	12%	15%	14%	10%	15%	3%	7%

Q. *Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? Please select all that apply.*

Trade Commissioner Service Demand for Services

Overall, organizations report a high level of need (categorized as some assistance or a great deal of assistance) for assistance across a range of international business development areas.

The greatest need is for referrals to international business opportunities and sales leads (n=556, 86%), followed by information about organizations or companies in foreign markets (n=535, 83%) and market intelligence and information (n=525, 81%). Three-quarters (n=481, 75%) indicate a need for assistance in recommendations on trade fairs or trade missions to attend, while 69% (n=448) seek support in understanding Canada's trade agreements.

Nearly two-thirds of organizations report needing assistance with understanding responsible business practices, risks, and opportunities in foreign markets (n=419, 65%) and locating financial or funding assistance for export-related activities (n=397, 62%). More than half indicate a need for preparation for market entry, such as cultural or pitch training (n=371, 58%), practical advice on timing and organizing business trips (n=367, 57%), and referrals to legal, human resources, translation, or other professional services (n=347, 54%). Similarly, 54% (n=346) seek support for intellectual property protection, government procurement, and related issues, and 52% (n=335) indicate a need for referrals to technology or R&D partnership opportunities.

Overall, these findings suggest that organizations require broad, end-to-end support across the international business lifecycle, with particularly strong demand for market opportunities, contacts, and market intelligence.

Figure 5. How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

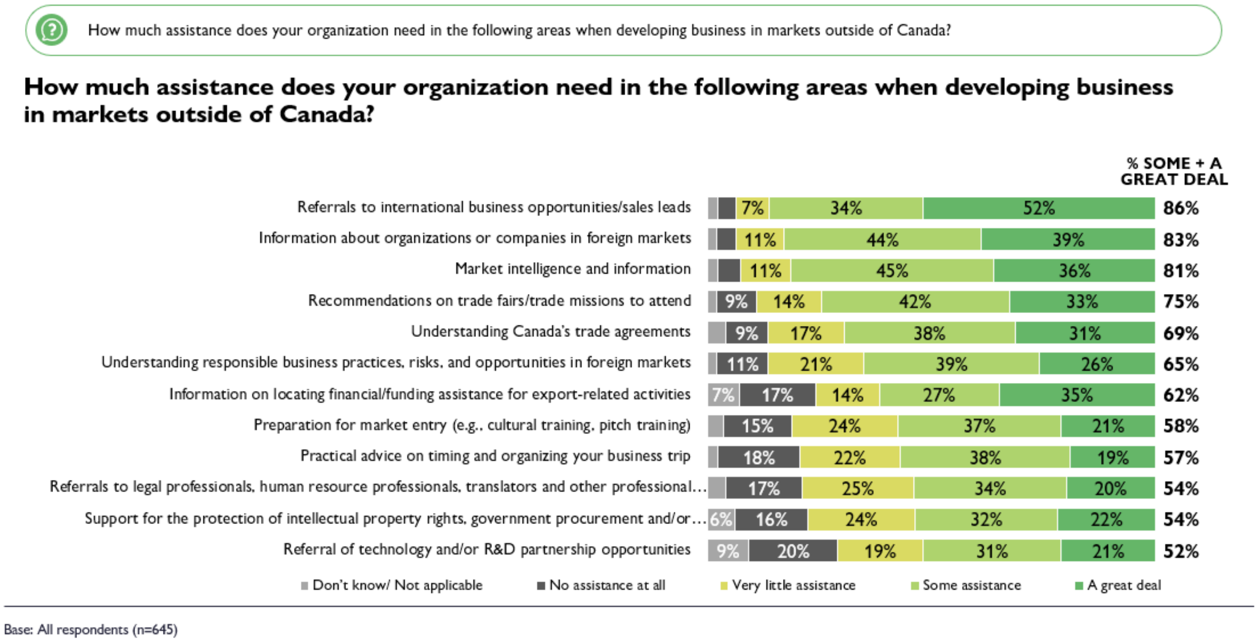


Table 9. How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

	Base (n)	NET: Some + Great Deal	A great deal	Some assistance	Very little assistance	No assistance at all	Don't know/Not applicable
Total	(645)	-	-	-	-	-	-
Referrals to international business opportunities/sales leads	(645)	86%	52%	34%	7%	4%	2%
Information about organizations or companies in foreign markets	(645)	83%	39%	44%	11%	4%	2%
Market intelligence and information	(645)	81%	36%	45%	11%	5%	2%
Recommendations on trade fairs/trade missions to attend	(645)	75%	33%	42%	14%	9%	2%
Understanding Canada's trade agreements	(645)	69%	31%	38%	17%	9%	4%

Understanding responsible business practices, risks, and opportunities in foreign markets	(645)	65%	26%	39%	21%	11%	2%
Information on locating financial/funding assistance for export-related activities	(645)	62%	35%	27%	14%	17%	7%
Preparation for market entry (e.g., cultural training, pitch training)	(645)	58%	21%	37%	24%	15%	4%
Practical advice on timing and organizing your business trip	(645)	57%	19%	38%	22%	18%	2%
Referrals to legal professionals, human resource professionals, translators and other professional service providers	(645)	54%	20%	34%	25%	17%	4%
Support for the protection of intellectual property rights, government procurement and/or regulatory matters	(645)	54%	22%	32%	24%	16%	6%
Referral of technology and/or R&D partnership opportunities	(645)	52%	21%	31%	19%	20%	9%

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

Overall, assistance needs are broadly consistent across regions, client types, years of international business experience, sectors, and ownership groups for most international business development activities. However, some differences emerge across specific areas of support:

- Education sector organizations are less likely to report needing assistance with understanding Canada's trade agreements (n=24, 44%).
- Visible minority–owned organizations are more likely to report needing assistance with understanding responsible business practices, risks, and opportunities in foreign markets (n=61, 80%).
- Organizations with 2–5 years of international business experience are more likely to report needing information on locating financial or funding assistance for export-related activities (n=84, 79%), while organizations with 10 or more years of experience are less likely to report this need (n=186, 54%). Creative Industries organizations (n=27, 90%) and visible minority–owned organizations (n=61, 80%) are also more likely to report needing financial or funding assistance for export-related activities.
- Visible minority–owned organizations are more likely to report needing preparation for market entry, such as cultural or pitch training (n=59, 78%).
- Women-owned organizations (n=78, 71%) and visible minority–owned organizations (n=60, 79%) are more likely to report needing practical advice on timing and organizing international business trips.

- Organizations in the Agriculture and Processed Foods sector (n=18, 31%) and organizations with 10 or more years of international business experience (n=159, 46%) are less likely to report needing referrals to technology or R&D partnership opportunities, while organizations in the Information and Communications Technology sector (n=84, 66%) and visible minority–owned organizations (n=59, 78%) are more likely to report this need.

Table 10. Demographic Differences in Assistance Needs for International Business Development

Less likely to need some or a great deal of assistance	More likely need some or a great deal of assistance
Referrals to international business opportunities/sales leads	
Information about organizations or companies in foreign markets	
Market intelligence and information	
Recommendations on trade fairs/trade missions to attend	
Understanding Canada's trade agreements	
Education Sector (44%)	
Understanding responsible business practices, risks, and opportunities in foreign markets	
	Visible minority-owned (80%)
Information on locating financial/funding assistance for export-related activities	
Those with 10 + years of international business experience (54%)	Those with 2-5 years of international business experience (79%) Creative Industries Sector (90%) Visible minority-owned (80%)
Preparation for market entry (e.g., cultural training, pitch training)	
	Visible minority-owned (78%)
Practical advice on timing and organizing your business trip	

Less likely to need some or a great deal of assistance	More likely need some or a great deal of assistance
	Women-owned (71%) Visible minority-owned (79%)
Referrals to legal professionals, human resource professionals, translators and other professional service providers	
Less likely to need some or a great deal of assistance	More likely need some or a great deal of assistance
Support for the protection of intellectual property rights, government procurement and/or regulatory matters	
Less likely to need some or a great deal of assistance	More likely need some or a great deal of assistance
Referral of technology and/or R&D partnership opportunities	
Less likely to need some or a great deal of assistance	More likely need some or a great deal of assistance
Agriculture and Processed Foods Sector (31%) Those with 10 + years of international business experience (46%)	Information and Communications Tech Sector (66%) Visible minority-owned (78%)

Activities Pivot x Trade

Among organizations that have made changes to their activities as a result of changes in the global economic landscape, the areas in which assistance is more likely to be needed vary depending on the type of activity undertaken.

- **Organizations that explored exporting goods and services to new foreign markets** are more likely to need assistance with market intelligence and information (n=402, 85%), information about organizations or companies in foreign markets (n=409, 86%), referrals to international business opportunities or sales leads (n=423, 89%), recommendations on trade fairs or trade missions to attend (n=370, 78%), practical advice on timing and organizing their business trip (n=284, 60%) and preparation for market entry (n=286, 60%).
- **Organizations seeking research and development and/or technology partnership opportunities in new foreign markets** are more likely to need information about organizations or companies in foreign markets (n=270, 87%), market intelligence and information (n=267, 86%), referrals to legal professionals and other professional service providers (n=194, 62%), support for the protection of intellectual property rights, government procurement and/or regulatory matters (n=194, 62%), referrals to technology and/or R&D partnership opportunities (n=222, 71%), information on locating financial/funding assistance for export-related activities (n=217, 70%), practical advice on timing and organizing their business trip (n=197, 63%), understanding responsible business practices, risks, and opportunities in foreign markets (n=218, 70%), preparation for market entry (n=197, 63%) and understanding Canada's trade agreements (n=233, 75%).

- **Organizations that exported goods and services to new foreign markets** are more likely to need recommendations on trade fairs or trade missions to attend (n=218, 80%), and understanding Canada’s trade agreements (n=200, 73%).
- **Organizations that engaged in a partnership or joint venture with a foreign organization** are more likely to require market intelligence and information (n=230, 87%), information about organizations or companies in foreign markets (n=234, 88%), support related to intellectual property rights, government procurement and/or regulatory matters (n=168, 63%), referrals to technology and/or R&D partnership opportunities (n=169, 64%), information on locating financial/funding for export-related activities (n=181, 68%), practical advice on timing and organizing their business trip (n=172, 65%) and understanding responsible business practices, risks, and opportunities in foreign markets (n=190, 72%).
- **Organizations that explored soliciting foreign investment from new foreign markets** are more likely to need information on referrals to legal professionals and other professional service providers (n=121, 61%), support for intellectual property rights and regulatory matters (n=126, 64%), referrals to technology and/or R&D partnership opportunities (n=131, 66%), information on locating financial/funding assistance for export-related activities (n=151, 77%) and recommendations on trade fairs/trade missions to attend (n=161, 82%).
- **Organizations that actively solicited foreign investment from new foreign markets** are more likely to seek support for the protection of intellectual property rights, government procurement and/or regulatory matters (n=81, 64%), referrals of technology and/or R&D partnership opportunities (n=92, 73%), information on locating financial/funding assistance for export-related activities (n=101, 80%), recommendations on trade fairs/trade missions to attend (n=106, 84%), practical advice on timing and organizing your business trip (n=83, 66%) and preparation for market entry (n=84, 67%)

Table 11. As a result of changes in the global economic landscape has your organization made any of the following changes to your activities? | How much assistance does your organization need in the following areas when developing business in markets outside of Canada? ***[Part 1]***

% Needed a great deal or some assistance	Base (n)	Market intelligence and information	Information about organizations or companies in foreign markets	Referrals to legal professionals, human resource professionals, translators and other professional service providers	Support for the protection of intellectual property rights, government procurement and/or regulatory matters	Referrals to international business opportunities/sales leads	Referral of technology and/or R&D partnership opportunities
Explored exporting goods and services to a new foreign market(s)	473	85%	86%	55%	54%	89%	53%
Seeking research and development and/or technology partnership opportunities in a new foreign market(s)	312	86%	87%	62%	62%	88%	71%
Exported goods and services to a new foreign market(s)	274	82%	85%	51%	50%	89%	52%
Engaged in a partnership or joint venture with a foreign organization	265	87%	88%	59%	63%	89%	64%
Explored soliciting foreign investments in your organization from a new foreign market(s)	197	84%	87%	61%	64%	89%	66%
Solicited foreign investments in your organization from a new foreign market(s)	126	87%	88%	60%	64%	90%	73%

Q. As a result of changes in the global economic landscape has your organization made any of the following changes to your activities? | How much assistance does your organization need in the following areas when developing business in markets outside of Canada ***? [Part 1]***

Table 12. As a result of changes in the global economic landscape has your organization made any of the following changes to your activities? | How much assistance does your organization need in the following areas when developing business in markets outside of Canada? ***[Part 2]***

% Needed a great deal or some assistance	Base (n)	Information on locating financial/funding assistance for export-related activities	Recommendations on trade fairs/trade missions to attend	Practical advice on timing and organizing your business trip	Understanding responsible business practices, risks, and opportunities in foreign markets	Preparation for market entry	Understanding Canada's trade agreements
Explored exporting goods and services to a new foreign market(s)	473	63%	78%	60%	67%	60%	72%
Seeking research and development and/or technology partnership opportunities in a new foreign market(s)	312	70%	78%	63%	70%	63%	75%
Exported goods and services to a new foreign market(s)	274	60%	80%	61%	67%	59%	73%
Engaged in a partnership or joint venture with a foreign organization	265	68%	77%	65%	72%	62%	74%
Explored soliciting foreign investments in your organization from a new foreign market(s)	197	77%	82%	63%	69%	62%	72%
Solicited foreign investments in your organization from a new foreign market(s)	126	80%	84%	66%	72%	67%	73%

Q. *As a result of changes in the global economic landscape has your organization made any of the following changes to your activities? | How much assistance does your organization need in the following areas when developing business in markets outside of Canada?* ***[Part 2]***

Among organizations that anticipate or are newly pursuing specific regions as a result of changes in the global economic landscape, the types of assistance most commonly needed vary by the region selected.

- Europe is more likely to require assistance with referrals to international business opportunities or sales leads (n=310, 90%).
- Southeast Asia and Oceania are more likely to require market intelligence and information (n=202, 88%).
- The Middle East shows a higher likelihood of needing referrals to legal professionals, human resource professionals, translators, and other professional service providers (n=140, 62%).
- North America is more likely to require assistance with support for the protection of intellectual property rights, government procurement and/or regulatory matters (n=126, 63%), referrals to technology and/or R&D partnership opportunities (n=127, 64%), and information on locating financial or funding assistance for export-related activities (n=141, 71%).
- South Asia is more likely to require information about organizations or companies in foreign markets (n=130, 91%) and practical advice on timing and organizing business trips (n=97, 68%).
- North Asia shows the highest likelihood of needing referrals to international business opportunities or sales leads (n=80, 96%).
- West and Central Africa are more likely than other regions to require market intelligence and information (n=72, 94%).

*Table 10. Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? Please select all that apply| How much assistance does your organization need in the following areas when developing business in markets outside of Canada**? [Part 1]***

% Needed a great deal or some assistance	Base (n)	Market intelligence and information	Information about organizations or companies in foreign markets	Referrals to legal professionals, human resource professionals, translators and other professional service providers	Support for the protection of intellectual property rights, government procurement and/or regulatory matters	Referrals to international business opportunities/sales leads	Referral of technology and/or R&D partnership opportunities
Europe	343	83%	85%	55%	57%	90%	57%
Southeast Asia and Oceania	230	88%	88%	58%	59%	91%	53%
Middle East	227	85%	85%	62%	60%	88%	55%
South America	208	87%	85%	56%	55%	88%	50%

North America	200	85%	89%	60%	63%	91%	64%
South Asia	143	89%	91%	61%	62%	93%	57%
Central America	135	87%	86%	61%	56%	91%	46%
Eastern Europe and Eurasia	123	88%	85%	53%	60%	87%	57%
Nordic Countries	113	83%	84%	47%	50%	91%	53%
North Asia	83	92%	93%	59%	60%	96%	55%
West and Central Africa	77	94%	87%	68%	61%	92%	55%
The Caribbean	76	89%	86%	63%	58%	93%	42%
Southern and Eastern Africa	73	84%	88%	62%	64%	92%	55%
Maghreb	39	87%	77%	54%	46%	85%	49%
None of the above	42	62%	69%	45%	40%	69%	40%
Don't know	18	67%	50%	28%	44%	56%	39%

Q. *Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? Please select all that apply| How much assistance does your organization need in the following areas when developing business in markets outside of Canada? [Part 1]*

*Table 10. Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? Please select all that apply| How much assistance does your organization need in the following areas when developing business in markets outside of Canada**? [Part 2]***

% Needed a great deal or some assistance	Base (n)	Information on locating financial/funding assistance for export-related activities	Recommendations on trade fairs/trade missions to attend	Practical advice on timing and organizing your business trip	Understanding responsible business practices, risks, and opportunities in foreign markets	Preparation for market entry	Understanding Canada's trade agreements
Europe	343	66%	78%	61%	69%	61%	73%

Southeast Asia and Oceania	230	63%	77%	63%	72%	62%	71%
Middle East	227	64%	75%	61%	70%	58%	74%
South America	208	59%	78%	57%	65%	58%	70%
North America	200	71%	79%	65%	70%	64%	77%
South Asia	143	68%	83%	68%	70%	66%	78%
Central America	135	60%	81%	61%	70%	62%	79%
Eastern Europe and Eurasia	123	65%	80%	59%	65%	62%	71%
Nordic Countries	113	63%	81%	58%	62%	55%	65%
North Asia	83	72%	87%	64%	75%	67%	81%
West and Central Africa	77	62%	81%	62%	73%	64%	71%
The Caribbean	76	63%	78%	61%	68%	57%	72%
Southern and Eastern Africa	73	59%	77%	59%	73%	67%	77%
Maghreb	39	67%	62%	51%	69%	59%	54%
None of the above	42	55%	60%	40%	48%	40%	52%
Don't know	18	28%	50%	33%	28%	22%	50%

Q. *Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? Please select all that apply| How much assistance does your organization need in the following areas when developing business in markets outside of Canada?* ***[Part 2]***

Part 2: Detailed Qualitative Interview Findings

Methodology

The qualitative research consisted of **key informant interviews** with TCS clients who had completed the quantitative survey component of this study. They were recruited on a permission-basis and were provided with an incentive of $200 to participate in a 30-45 minute interview using online videoconferencing through the Recollective Platform.

All participants were screened to ensure they had a basic level of comfort using videoconference technology as well as a high-speed internet connection (or necessary bandwidth) to be able to participate effectively with audio and video. Appropriate accommodations (e.g. phone interview for the visually-impaired, use of chat or bulletin board for the hearing impaired, etc.) were offered for those with a disability based on AODA standards.

Based on Government of Canada and ESOMAR/CRIC qualitative research standards, we excluded any prospective participants (other than TCS Partners) where a member of their household is an employee or contractor for the Government of Canada. In addition, participants were excluded if they met any of the following conditions:

- Participants had attended another qualitative research session on any topic with the past six months
- Participants had attended another qualitative research session on the present topic within the last two years
- Participants had attended more than five qualitative research sessions within the past five years

The recruiting screener is provided as **Appendix.**

A total of 30 in-depth interviews were conducted between December 2025 and March 2026. Interviews lasted between 30 and 45 minutes and were conducted by video conference using the Recollective Platform[1]. Participants were invited to participate through the quantitative survey administered as part of this initiative by Abacus Data. The resulting participant profile is broadly reflective of many export sectors and Canadian regions (See below).

Interviews followed a semi-structured guide[2], allowing participants to speak freely about their experiences and opinions. Participants were reminded that they were being recorded (and verbal permission was confirmed). They were also reminded that individual conversations would remain confidential, and that only aggregate results would be conveyed to the TCS. No TCS staff

[1] In three cases, technical difficulties were encountered with Recollective, in which case the interviews were conducted using MS Teams, and recorded where possible.

[2] The discussion guide is presented as Appendix I.

or management observed any of the interviews. The data and information collected in the course of this project are stored on servers and back-up servers located solely in Canada.

Finally, they were also reminded that in no way would this interview have any impact on any relationship they have with the Government of Canada, and that the report would be publicly available in approximately six months.

Table 11. Profile of Interview Participants

Category	**Profile Summary**
Number of interviews	28 interviews in English, 2 in French
Company size	22 SMEs; 5 large enterprises, 1 partner,2 educational institutions
Sectors	Advanced manufacturing; agri-food; cleantech; ICT; life sciences; aerospace; natural resources; professional services; defence; infrastructure
Primary export market	United States
Secondary markets	EU, UK, Indo-Pacific, Latin America, Middle East
TCS relationship length	6 years to more than 20 years
Participant roles	CEO, President, VP International, Director of Exports, Founder/Owner

Extrapolating the results to a broader audience

Please note that the findings from this qualitative research cannot be inferred to, and are not representative of, any wider population than those who participated.

Experience and Relationship with the TCS

How the Relationship Started

Most participants have been working with the TCS for several years, with most indicating the relationships span between 10-15 years, and some as many as 25 years. For many, engagement with TCS did not begin as part of a formal export strategy, but rather at a practical inflection point—when exploring a first export market, responding to a trade mission invitation, or seeking guidance in the face of an unfamiliar regulatory or commercial environment. In some cases (Defence, Infrastructure) the TCS reached out proactively to the participant either to participate in a trade mission, or to respond to a specific business opportunity identified in-market by the trade commissioner (e.g. RFP or tender)

Several clients described first engaging with TCS through participation in trade missions. In these cases, participants' expectations of the TCS were often modest. One small manufacturer recalled joining a mission largely to observe: *"We weren't expecting sales. We just wanted to understand how international markets actually worked."* While immediate commercial successes were rare, participants emphasized that these early engagements often reshaped how they were perceived by foreign counterparts. As one exporter explained, *"The meetings themselves didn't close deals, but they signaled that we were serious. That opened doors later."*

Other participants described being referred to TCS by provincial trade agencies, industry associations, or peers. In these instances, initial skepticism was common. Several exporters admitted they only expected generic or high-level advice. One SME owner noted, *"I assumed it would be a brochure and a list of contacts. What surprised me was how quickly they focused on our actual bottleneck."* For these clients, perceived value emerged once trade commissioners demonstrated familiarity with their sector and their business.

A smaller but notable group of participants described being contacted proactively by Trade Commissioners based on specific in-market opportunities in their sector, trade show participation, and/or market intelligence. These outreach efforts were viewed positively when they were clearly tailored. One exporter commented, *"It didn't feel like a sales pitch. It felt like someone who had read our website and understood where we might fit."*

Services Used and Value Provided

Clients reported using a broad range of TCS services, often sequentially and in combination. **Market intelligence** was among the most frequently cited services, particularly during early-stage market exploration. Participants valued **insight that went beyond publicly available information**, especially intelligence grounded in local business practice. One exporter described this support as "*the difference between what looks attractive in a report and what actually works once you're there*."

Partner identification and introductions were consistently described as high-value services. Clients emphasized that the **credibility of TCS-facilitated introductions** often led to more productive conversations. As one participant put it, "*When the trade commissioner makes the introduction, people take the meeting seriously.*" Several clients contrasted this with cold outreach, noting higher response rates and better preparation among counterparts.

Trade missions and market visits were viewed as most effective when they were tightly aligned with client objectives. Participants appreciated it when meetings were curated rather than numerous. One exporter reflected, "The most useful missions weren't about how many meetings we had. They were about whether the right people were in the room."

For firms operating in regulated sectors (e.g. defence, life sciences), **regulatory guidance** emerged as a critical source of value. Clients described relying on trade commissioners to help interpret not only formal rules but also informal expectations and sequencing. One life sciences participant noted, *“They helped us understand what had to happen first—and what could wait. That saved us months.”*

Several participants also described instances where the TCS played a **troubleshooting** role. These situations often arose unexpectedly—such as shipment delays, regulatory questions, or changes in local policy. In these moments, clients valued having access to an in-market contact who could navigate local systems. One SME recalled, *“We didn’t need someone to fix it for us. We needed someone who knew who to call.”*

Evolution of the Relationship

Longer-term clients frequently described a clear evolution in their relationship with the TCS. Initial interactions were often transactional, focused on information gathering or introductions. Over time, as familiarity grew, conversations shifted toward strategy. One exporter described this transition succinctly: *“At first it was about the market. Later it was about our place in that market.”*

Where continuity was maintained, trade commissioners were described as anticipating needs and proactively sharing relevant intelligence. Participants valued this foresight, particularly in volatile environments. As one client noted, *“They flagged issues before they became problems. That only happens when someone really knows your business.”*

Less Satisfactory Experiences

Despite generally positive perceptions, a few participants discussed less satisfactory experiences. **Variability in service quality across posts and individuals was a recurring theme**. In highly technical sectors, some clients felt that trade commissioners required time to develop sufficient sector familiarity. One participant explained, *“We spent the first few conversations educating them before we could talk about strategy.”* Another participant (defence) expected the TCS to provide them notice of tenders in their specific market.

Staff turnover was another commonly cited challenge. Clients described frustration when relationships were disrupted and contextual knowledge was lost. One long-standing client remarked, *“You can read the file, but you can’t replace lived history.”* These disruptions were particularly noticeable for firms engaged in long-term market development.

In a small number of cases, participants felt that expectations had not been clearly aligned regarding the scope or timing of TCS support. These experiences were typically framed as missed opportunities rather than failures. As one exporter reflected, *“It wasn’t that they weren’t helpful—it was that we thought they could do more than they actually could.”*

Overall Assessment of Value

Overall, participants emphasized that the value of the Trade Commissioner Service is cumulative rather than immediate. Clients described benefits that accrued over time through relationships, credibility, and access. As one exporter summarized, *"You don't always see the payoff in one interaction. But when you look back, they've been part of most of our important decisions."*

Interactions with Trade Commissioners: Professionalism, Responsiveness, and Knowledge

Professionalism

Professionalism was one of the most consistently cited strengths of trade commissioners. Participants frequently described interactions as well-organized, respectful, and efficient, particularly in formal settings such as trade missions, government-to-business meetings, and introductions to foreign partners.

Several clients recalled situations where the conduct of the trade commissioner shaped first impressions in a meaningful way. One exporter explained, *"They set the tone. When the trade commissioner was prepared and confident, it reflected well on us too."* This was especially important in markets where protocol, hierarchy, and government affiliation carry significant weight.

Professionalism was also associated with reliability and follow-through. Clients appreciated when commitments were clearly communicated and met. One participant noted, *"If they said they'd get back to us by Friday, they did. That builds trust."*

Less satisfactory experiences were less common but did occur. In a small number of cases, clients described interactions that felt rushed or overly formal. One exporter commented, "*It wasn't unprofessional, but it felt transactional—like we were one of many files."* These experiences tended to occur when engagement was brief or episodic rather than sustained.

Responsiveness

Responsiveness emerged as a critical factor shaping client perceptions, particularly during periods of uncertainty or disruption. Many participants recalled situations where timely responses made a tangible difference to decision-making.

One SME described reaching out to a trade commissioner late in a market-entry process with an urgent regulatory question: *"We didn't expect an answer right away, but they came back the same day. That helped us move forward instead of freezing."* Such experiences were often framed as moments where TCS demonstrated practical value.

Clients also valued proactive responsiveness—instances where trade commissioners reached out without being prompted. One participant explained, *"They flagged an issue before we even knew it existed. That saved us time and money."*

Less Satisfactory Experiences

Less satisfactory experiences related primarily to delays, uneven response times, or in some cases, outright being ignored ("ghosted"). Some participants acknowledged workload pressures but still described frustration when follow-up took longer than expected. One exporter remarked, *"We understood they were busy, but when you're waiting on an answer, even a quick update helps."* In some exceptional cases, participants reported "being ghosted" completely, which was particularly disheartening, since even though they were a small business, they had already had export success in other markets, so they didn't understand why they would be ignored. This experience deeply affected these participants' perception of, and willingness to use, the TCS. In a couple of exceptional cases, participants reported being ignored because they were not engaged in exporting directly, but represented organizations that were planning to enter a market.

Level of Knowledge

Perceptions of Trade Commissioners' knowledge were generally positive, particularly with respect to local market dynamics, business culture, and regulatory landscapes. Clients valued insight grounded in lived market experience rather than theory.

One exporter described the difference this made: *"They didn't just tell us what the rules were—they told us how things actually work."* This practical knowledge was especially important in emerging or complex markets.

However, participants also noted variability in sector-specific expertise. In highly technical or regulated industries, some clients felt that trade commissioners required time to fully understand their product or value proposition. One participant explained, *"They were smart and engaged, but we had to do some educating before we got into meaningful discussions."*

Where trade commissioners demonstrated strong sector familiarity, the impact was significant. Clients described feeling more confident and better represented. As one exporter noted, *"Once they really understood our space, the quality of conversations improved dramatically."*

Balancing Strengths and Limitations

Across interviews, clients generally viewed less satisfactory experiences as situational rather than systemic. Even when frustrations were expressed, participants tended to contextualize them within broader operational realities, such as staffing changes or competing priorities at busy posts.

Importantly, many clients emphasized that strong individual trade commissioners could significantly shape overall perceptions of TCS. As one participant summarized, "*When you have a good trade commissioner, they become an extension of your team."*

Digital Services and the Human Element

Across interviews, participants generally recognized and appreciated the increasing use of digital tools and services by the Trade Commissioner Service. Digital platforms were commonly described as useful entry points—particularly for initial information-gathering, awareness of services, and logistical coordination. At the same time, clients were clear that **digital tools were most effective when complemented by direct human interaction.**

As one exporter summarized, *"The digital tools get you started. The people are what actually move things forward."*

Perceived Value of Digital Services

Clients most often described digital services as efficient, accessible, and time-saving. Online portals, email updates, virtual briefings, and digital matchmaking tools were frequently cited as helpful, particularly during early stages of market exploration or when travel was not feasible.

One SME exporter explained that digital services lowered the barrier to engagement: *"It made it easier to reach out. You don't have to know who to call—you just start online."* Another participant described virtual briefings as *"a good way to get oriented before deciding whether a market is worth deeper investment."*

Several clients noted that digital tools were especially valuable during periods of disruption, including travel restrictions and rapidly changing global conditions. Virtual meetings allowed momentum to be maintained when in-person engagement was not possible.

Limitations of Digital-Only Engagement

Despite these benefits, participants consistently emphasized the limits of digital-only engagement. **Many noted that while digital tools were effective for sharing information, they were less effective for building trust, understanding nuance, or navigating complex commercial and regulatory environments.**

One exporter reflected, *"You can't read a market through a screen. You need someone who's actually there."* Another client commented that digital matchmaking felt *"efficient but shallow"* without follow-up from a trade commissioner who understood both parties.

Several participants also noted that digital interactions could feel generic if not clearly tailored.

One client remarked, *"When it's just digital, you sometimes feel like you're being slotted into a system rather than supported as a business."*

Several participants also noted that they would not necessarily use AI provided by the TCS, as they tend to already be avid users of AI in order to find market and regulatory information. *"We don't need the TCS for AI, we need them for the person-to-person introductions and for their credibility. We can do AI on our own."*

The Enduring Importance of the Human Element

The importance of the human element emerged as a strong and consistent theme. **Clients repeatedly emphasized that the real value of the TCS lies in the judgment, experience, and relationships of trade commissioners.**

Participants described trade commissioners as interpreters of local context—helping them understand not just formal rules, but how business is actually conducted. As one exporter put it, *"They tell you what people won't put in writing."*

Trust was another key dimension. Clients noted that trust develops through conversation, continuity, and shared problem-solving, rather than through digital interactions alone. One participant explained*, "Once you've worked through a problem together, you trust their advice. That doesn't happen online."*

Blending Digital and Human Approaches

Rather than viewing digital and human services as substitutes, participants consistently framed them as complementary. Digital tools were seen as effective for scaling access and improving efficiency, while human engagement was viewed as essential for depth and impact.

Several clients suggested that the most effective engagements combined both approaches. One exporter described this balance: *"The digital tools help narrow the field. The trade commissioner helps you choose where to place your bet."*

Another participant noted that digital services worked best when anchored by a named contact: *"Even if the first interaction is online, it makes a huge difference to know who your person is."*

Suggestions for Improvement

While overall satisfaction with the Trade Commissioner Service remains high, respondents identified several areas where service delivery could be further strengthened. Clients emphasized the value of **deeper sector-specific knowledge, particularly in highly technical or regulated industries**, to reduce early learning curves and accelerate progress.

Improved continuity during staff transitions was frequently cited as an opportunity to preserve institutional knowledge and maintain momentum in long-term market development efforts.

Participants also suggested **clearer communication around service scope, timelines, and expected outcomes** to better align expectations, especially for newer clients. In addition, clients expressed interest in **more proactive intelligence-sharing**—particularly related to policy changes, regulatory developments, and emerging risks—so they can anticipate challenges rather than respond reactively.

Finally, while digital tools were seen as useful for access and efficiency, respondents underscored the importance of ensuring these tools complement, rather than replace, relationship-based engagement with Trade Commissioners.

Impact of Changes in the U.S. and Global Economic Environment

Changes in U.S. trade policy, including tariffs, industrial policy measures, and shifting procurement preferences, were a dominant feature of client conversations. Participants did not speak about these changes in abstract policy terms; instead, they described how policy shifts filtered into everyday business decisions related to pricing, investment, staffing, and market strategy.

A recurring theme was that **uncertainty** itself—rather than any single tariff or measure—was the most disruptive factor. As one exporter explained, *"We can deal with almost any rule[3] if we know it's stable. What's hard is building a plan when the rules feel temporary."*

Several firms described **delaying or scaling back investment and/or staffing decisions** because of unpredictable U.S. signals. An advanced manufacturing firm noted that it had postponed the purchase of new equipment: *"We had the capital lined up, but we didn't want to lock ourselves into a cost structure when trade conditions could shift again."* For SMEs in particular, this caution extended to hiring. One participant remarked, *"We're running leaner[4] than we want to.*

[3] This was meant more generally than just CUSMA, and referred to the general feeling that "rules" (read: policies) are changing often and there is little predictability.

[4] The participant indicated they were refraining from adding staff (hiring), but not laying off or reducing staff.

It's a defensive move."

At the same time, exporters emphasized the continued importance of the U.S. market. Many described absorbing tariff-related costs or renegotiating contracts rather than withdrawing. A participant in the agri-food sector summarized this pragmatism: *"The U.S. is still our anchor market. We manage around the friction because the alternative is worse."*

Positive Impacts

Interestingly, some participants identified unexpected positive impacts stemming from U.S. trade measures. A number of firms reported **increased interest from non-U.S. buyers seeking alternatives to U.S. suppliers** affected by tariffs. One clean technology exporter described receiving inquiries from European clients: *"They were very direct—they said they were looking for non-U.S. suppliers because of tariff risk."*

Similarly, a manufacturing firm noted increased engagement from Asian partners: "*We weren't actively targeting that market, but suddenly we were getting calls. The U.S. tariffs changed the conversation in our favour."* While these opportunities were welcomed, participants cautioned that converting interest into sustained business requires time, local presence, and regulatory adaptation.

Diversification

Diversification was therefore discussed as both an opportunity and a challenge. Clients frequently framed diversification as a hedge against U.S. volatility rather than a replacement strategy. As one exporter put it, *"Diversification isn't about walking away from the U.S. It's about not having all your eggs in one basket."* Clients spoke about exploring Europe, the Indo-Pacific, and other markets, frequently with TCS support. However, diversification was described as resource-intensive and slow. One participant summarized, *"Everyone wants diversification, but it's a long game. You don't replace the U.S. in two years."*

Some firms responded to U.S. policy changes by expanding or relocating operations south of the border. While this reduced exposure to tariffs, it raised broader concerns. One participant acknowledged the trade-off: "*It solves the tariff problem, but it creates a bigger strategic question about where we invest long term."*

Finally, participants tend to be pragmatic. Many described maintaining U.S. market focus despite challenges. As one exporter put it, *"The U.S. is still the market that pays the bills. We manage the risk, but we don't walk away."*

Supply Chain Impacts of U.S. Tariffs on Steel and Aluminum

Participants described the impact of U.S. tariffs on steel and aluminum as disruptive not only because of higher costs, but because of the way those costs were introduced—abruptly, unpredictably, and often mid-stream in existing commercial arrangements. Several interviewees recounted situations where pricing assumptions that had underpinned contracts or bids were overturned with little warning. One participant captured this sense of sudden disruption, noting that they had "*pricing locked in*," only to be told shortly thereafter that this was no longer valid and that suppliers were operating under "*a new reality.*"

For firms operating on thin margins, these changes were particularly difficult to absorb. Participants explained that contractual constraints often prevented immediate cost pass-through to customers, forcing them to absorb losses in the short term. As one exporter put it, *"You can't just pass it on overnight,"* describing how the tariff shock translated directly into margin compression rather than shared risk.

Beyond cost increases, participants emphasized changes in supplier behaviour as a significant consequence of tariffs. Several interviewees described how suppliers with exposure to both Canadian and U.S. customers began prioritizing U.S. orders to minimize tariff exposure or administrative complexity. One manufacturer described being effectively deprioritized, explaining that their suppliers were clear about needing to "*protect their U.S. clients first*." This shift disrupted long-standing supplier relationships and forced Canadian firms to seek alternative sources, often at higher cost and with additional qualification requirements.

Uncertainty again emerged as a compounding factor that extended well beyond the initial tariff announcements. Even where tariffs were adjusted or temporarily lifted, participants described a reluctance to revert to previous sourcing arrangements. One interviewee noted that once supply chains had been disrupted, firms no longer assumed stability would return, explaining that they now plan "*for disruption as the default*." This mindset shift was reflected in more conservative procurement strategies, higher inventories, and contingency planning becoming routine rather than exceptional.

Impacts of Tariffs on the Forestry Sector

In the lumber sector, participants described a different but equally disruptive set of dynamics. Interviewees connected to forestry, construction, and value-added wood products emphasized that **mill** closures (implied but not specified to be Canadian mills) **and curtailments had cascading effects across supply chains**. Rather than being isolated events, plant closures were described as removing critical nodes in supply networks. As one participant put it, "*When a mill closes, it's not just jobs. It's an entire supply chain that has to reconfigure."*

Several participants described how reduced domestic capacity led to **longer lead times and less predictable availability** of lumber inputs. Production planning was described as increasingly complex, with firms building contingency scenarios for materials that were previously reliable. One exporter explained that whereas they had once planned weeks ahead with confidence, they now plan with multiple contingencies because "*you don't know what's going to be available*."

Increased competition for remaining supply was also a recurring theme. Participants described multiple buyers chasing reduced volumes, contributing to price volatility even before tariffs were factored in. As one interviewee noted, *"Everyone's chasing the same volume,"* creating upward pressure on costs and reducing negotiating leverage for buyers.

Some participants explicitly linked lumber plant closures to prolonged trade disputes and policy uncertainty with the United States. Interviewees claimed that sustained **uncertainty discourages reinvestment in domestic capacity**, observing that once mills close, they are slow and costly to restart. One participant summarized this dynamic by noting that when *"the rules keep changing,"* companies hesitate to invest, turning short-term disruption into a longer-term structural challenge.

Across both metal and lumber supply chains, participants described a range of operational responses. Many firms reported carrying higher inventory levels to buffer against supply interruptions, despite the strain this placed on working capital. One manufacturer described this approach as "insurance"—necessary but costly—to avoid production shutdowns. Others spoke about redesigning products or substituting materials where possible, though these adaptations often required additional engineering effort and regulatory validation.

At a strategic level, a smaller number of participants described broader reassessments of their operating models. While few indicated immediate relocation decisions, some interviewees acknowledged that persistent exposure to trade volatility raised fundamental questions about where production should be located. As one participant explained, there comes a point where firms begin to ask whether it makes sense to maintain certain activities in Canada if key inputs remain consistently at risk.

Conclusions

Value of the Trade Commissioner Service

Overall, participants expressed a strong and sustained appreciation for the Trade Commissioner Service, particularly among long-standing clients with relationships extending over many years. The value of the TCS was most often described as cumulative rather than transactional, accruing over time through trusted relationships, credibility, and access to in-market networks.

Clients consistently highlighted three core areas of value: market intelligence that goes beyond publicly available sources, facilitation of meaningful in-market contacts, and the credibility associated with Government of Canada representation. For many participants—especially small and medium-sized enterprises—the presence of a trade commissioner was described as opening doors that would otherwise remain closed.

Participants also emphasized the importance of the human element in TCS service delivery. While digital tools and platforms were viewed as helpful entry points and efficiency enablers, participants were clear that judgment, contextual understanding, and relationship-based support provided by trade commissioners are what ultimately enable business outcomes. Taken together, these findings suggest that the TCS is viewed not simply as a service provider, but as a long-term partner in exporters' international growth.

Sources of Dissatisfaction

Although overall satisfaction with the TCS is high, participants identified several sources of dissatisfaction that affected their experiences. These issues were generally framed as situational rather than systemic, but nevertheless had a meaningful impact on perceptions among affected clients.

The most frequently cited concern related to variability in service quality, particularly differences across posts or individual trade commissioners. In highly technical or regulated sectors, some participants felt that trade commissioners required time to fully understand their business, resulting in slower progress during early engagements.

Responsiveness was another area where dissatisfaction occasionally arose. While many participants provided positive examples of timely and proactive support, a small number described delayed follow-up or, in rare cases, a complete lack of response. These experiences were especially discouraging for clients who had already demonstrated export success and expected a higher level of engagement.

Staff turnover also emerged as a challenge, particularly for clients engaged in long-term market development. Participants noted that while file handovers may occur, the loss of contextual and relational knowledge can disrupt momentum. Clearer expectation-setting regarding the scope and timing of TCS support was identified as another opportunity to reduce frustration and better align client expectations.

Impact of Changes in the Global Economic Environment (U.S. Tariffs)

Changes in the global economic environment—and U.S. trade policy in particular—formed a central backdrop to participants' experiences. While many participants indicated that their direct exposure to U.S. tariffs was limited due to sectoral coverage under CUSMA or a focus on services, uncertainty itself emerged as the most significant and pervasive impact.

Participants described how uncertainty related to tariffs, industrial policy, and shifting procurement preferences in the United States influenced day-to-day business decisions. Several participants reported postponing or scaling back investments, delaying hiring, or adopting more defensive operating strategies in response to unpredictable policy signals.

For participants connected to steel, aluminum, and lumber supply chains, the impacts were more acute. Interviewees described abrupt cost increases, supplier reprioritization toward U.S. customers, and cascading disruptions following lumber mill closures. These dynamics eroded predictability and increased planning complexity, forcing firms to carry higher inventories, qualify alternative suppliers, or redesign products.

At the same time, participants demonstrated a pragmatic approach to these challenges. Many continued to view the United States as an anchor market, absorbing costs or adjusting operations rather than withdrawing. Others reported pursuing diversification as a hedge against volatility, with growing interest from European and Asian buyers seeking alternatives to U.S. suppliers. Overall, the findings suggest that while exporters are adapting to a more uncertain environment, sustained volatility has longer-term implications for investment decisions, supply chain resilience, and strategic planning.

Appendices

A. Methodological details

Quantitative Methodology

The 2025 follow-up survey was conducted among a cohort of clients who completed the 2024 TCS Comprehensive Client Survey. A total of *n* = 2,414 eligible respondents were invited to participate via personalized survey links distributed by Global Affairs Canada. Data collection was conducted between **December 1, 2025, and January 18, 2026**.

The survey required an average of 5 minutes to complete and yielded **645 completed responses**, corresponding to a **response rate of 26.7%**. No weighting was applied to the data. As a census of all eligible cohort members was attempted, a margin of error is not applicable.

The survey required an average of 5 minutes to complete and yielded 645 completed responses, corresponding to a response rate of 26.7%.

Response rate calculation:

Response Rate = Number of completed responses / Number of respondents invited
= 645 / 2,414 = 26.7%

No weighting was applied to the data. As a census of all eligible cohort members was attempted, a margin of error is not applicable.

Due to the limited question set in the 2025 survey, demographic and firmographic characteristics used in the analysis are based on data collected in the 2024 TCS Comprehensive Client Survey. Respondent profiles were matched across survey waves using a unique identifier.

There is always the potential for non-response bias when conducting client surveys. Non-response bias occurs when the likelihood of participation is systematically related to respondent characteristics or experiences rather than being random.

In this case, the survey sample was drawn from a cohort of respondents to the 2024 TCS Comprehensive Client Survey. This cohort-based approach may introduce selection bias, as individuals who participated in the previous survey may differ systematically from those who did not. Additionally, respondents to the 2025 follow-up survey may differ from non-respondents in ways that could affect the findings. As such, results should be interpreted with caution.

Qualititative Methodology

As part of the 2025 client research being conducted on behalf of the Trade Commissioner Service, Abacus Data Inc. conducted 30 one-on-one follow-up interviews with TCS clients who have answered the survey.

Participants will be selected based on their responses to key questions in the survey, and then asked a series of additional questions to ensure they meet [Government of Canada Public Research Standards for Qualitative Research]

We attempted to recruit a broad sample of participants according to ensure representation based on the following criteria, in relative order of importance:[5]

- Level of satisfaction with the TCS
- Company size (SME/large/partner)
- Region of Canada
- Sector

The table below shows the final interviews by selection criteria. Overlap between profiles (e.g.., where a participant falls within the definition of small business and satisfied with TCS) is expected and will be reflected in the analysis.

The procedure for selecting and inviting respondents was as follows:

1. Respondents who answer the survey are asked at the end of the survey for permission to be re-contacted to complete a follow-up interview
2. Respondents who agree to be re-contacted are screened against the final selection criteria.
3. Those meeting the criteria who are selected to participate in an interview will receive an invitation email to set up a videoconference appointment from Abacus (based on the permission they provided during the survey).
4. The interviews will be conducted by the Abacus qualitative researchers by videoconference. Each interview lasts between 30 and 45 minutes.
5. Each respondent's full set of questionnaires responses will be available to the researchers for use in the qualitative analysis.

[5] While several criteria are listed above, it should be noted that participants will be *invited* based on their responses to these questions. While we will make every attempt to invite and recruit participants to complete the interview based on these criteria, the final sample will depend on the mix of those who respond and complete the interview.

Table 11. Participant Summary

Category	Profile Summary
Number of interviews	28 interviews in English, 2 in French
Company size	22 SMEs; 5 large enterprises, 1 partner,2 educational institutions
Sectors	Advanced manufacturing; agri-food; cleantech; ICT; life sciences; aerospace; natural resources; professional services; defence; infrastructure
Primary export market	United States
Secondary markets	EU, UK, Indo-Pacific, Latin America, Middle East
TCS relationship length	6 years to more than 20 years
Participant roles	CEO, President, VP International, Director of Exports, Founder/Owner

B. Survey Questionnaire

Introduction

Thank you for your willingness in completing this survey aimed at gaining a better understanding of the current needs and challenges faced by Canadian companies seeking to do business internationally.

Global Affairs Canada (GAC) has commissioned Abacus Data to conduct a short survey with representatives of Canadian clients and partners who received service from the Canadian Trade Commissioner Service (TCS). This research will help GAC better understand the needs and challenges faced by Canadian companies seeking to do business internationally, including current challenges and obstacles when exporting, and other related issues.

The survey should take approximately 5 minutes to complete and your answers will remain anonymous and participation is voluntary.

If you begin the survey and find you need to come back later to complete it, you may use the save and continue button to have a copy of the survey emailed to you so you may 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.

Should you have any questions about the survey please contact: TCSsurvey-sondageSDC@international.gc.ca.

Main Survey

Market Pivot
Q1/F1 Currently, does your organization export goods or services...

Only to the United States
To the United States and other foreign markets
To foreign markets but not the United States
None, planning on doing international business in the future
Don't know/Not sure

Jobs Pivot
Q2 As a result of new international business you have achieved which was supported by the TCS, has the total number of employees within your organization changed?

Increased significantly (by more than 10)
Increased moderately (by 5-10)
Increased nominally (by 1-5)
No change
Decreased nominally (by 1-5)
Decreased moderately (by 5-10)
Decreased significantly (by more than 10)

Activity Pivot
Q3 As a result of changes in the global economic landscape has your organization made any of the following changes to your activities?

Yes
No
Don't know

Exported goods and services to a new foreign market(s)
Explored exporting goods and services to a new foreign market(s)
Solicited foreign investments in your organization from a new foreign market(s)
Explored soliciting foreign investments in your organization from a new foreign market(s)
Engaged in a partnership or joint venture with a foreign organization
Seeking research and development and/or technology partnership opportunities in a new foreign market(s)

Q4/PF2 Which new regions do you anticipate pursuing/are you newly pursuing as a result of these changes in the global economic landscape? *Please select all that apply.*
Central America
Eastern Europe and Eurasia
Europe
Maghreb

Middle East
Nordic Countries
North America
North Asia
South America
South Asia
Southeast Asia and Oceania
Southern and Eastern Africa
The Caribbean
West and Central Africa
None of the above
Don't know: 99

Q5/PC1 How much assistance does your organization need in the following areas when developing business in markets outside of Canada?

A great deal
Some assistance
Very little assistance
No assistance at all
Don’t know/ Not applicable

C1A Market intelligence and information

C1B Information about organizations or companies in foreign markets

C1C Referrals to legal professionals, human resource professionals, translators and other professional service providers

C1D Support for the protection of intellectual property rights, government procurement and/or regulatory matters

C1E Referrals to international business opportunities/sales leads

C1F Referral of technology and/or R&D partnership opportunities

C1G Information on locating financial/funding assistance for export-related activities

C1H Recommendations on trade fairs/trade missions to attend

C1I Practical advice on timing and organizing your business trip

C1J Understanding responsible business practices, risks, and opportunities in foreign markets

C1K Preparation for market entry (e.g. cultural training, pitch training)
C1L Understanding Canada’s trade agreements

Thank You
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. Qualitative Recruiting

RECRUITING SCREENER

ADMINISTERED TO THOSE WHO INDICATE IN THE SURVEY THAT THEY ARE WILLING TO PARTICIPATE IN THE FOLLOW-UP INTERVIEW

S1. Thank you for agreeing to participate in a follow-up interview. Having a greater knowledge of your experience with the TCS will be extremely helpful. We need to ask you a few questions to ensure you aware of and agree to the research process, as per Government of Canada and market research industry standards.

Global Affairs Canada (GAC) has commissioned Abacus to conduct a series of interviews with representatives of Canadian clients and partners who have previously received services from the Canadian Trade Commissioner Service (TCS). This research aims to help GAC better understand the needs and challenges faced by Canadian companies when conducting and/or seeking to do business internationally, including current challenges and obstacles when exporting, and other related issues.

The interviews will take approximately 30 to 45 minutes. Participation is entirely voluntary, and your responses will be kept strictly confidential. No identifying information will appear in the aggregate report, and your participation will not impact any current or future interactions with the TCS.

Please note that not everyone who expresses interest will be selected, as we aim to gather diverse perspectives.

If you are still interested in participating, please click “Next" to complete our brief screener.

To begin, do you or anyone in your household currently work or have worked in any of the following areas in the last five years?

	I work for one of these types of organizations	I don’t, but someone in my household does	No one in my household works for one of these types of organizations
Global Affairs Canada, Export Development Canada, Business Development Canada, Agriculture and Agri-Food Canada, or any other federal department or agency involved in international business development	01 Classify as “Partner”	Thank and terminate	No

A provincial or municipal export and/or investment promotion agency	01 Classify as "Partner"	Thank and terminate	No
The marketing research or media industry	01 Thank and Terminate	Thank and terminate	No

CONTINUE IF ANSWER NO TO ALL

Previous FG Experience

1. Have you participated in any qualitative research, e.g. focus groups or in-depth interviews (*as a participant, not as a client)* project in the past 6 months?

Yes	01	Terminate
No	02	
Don’t know	99	Terminate

2. In the past 6 months, have you participated in any qualitative research projects about international business development, other than the most recent TCS survey you just completed?

Yes	01	Terminate
No	02	
Do not know	99	Terminate

3. In the past 5 years, approximately how many qualitative research projects would have you participated in? ___________ Exact number

None	01	
From 1 to 5	02	
More than 5	03	Terminate
Don’t know	99	Terminate

PRIVACY QUESTIONS (All Participants)

Now we have a few other questions that relate to privacy, your personal information, and the research process. We will need your consent on a few issues that enable us to conduct our research.

P1) First, we will be providing a list of participants’ first names and profiles (screener responses) to the researcher so that they can sign you into the group. Do we have your permission to do this?

Yes	1	GO TO P2
No	2	READ EXPLANATION BELOW; GO TO P1A

We need to provide the first names and background of the people participating in the interview, since only the individuals invited are allowed in the session. This information is necessary for verification purposes. Please be assured that this information will be kept strictly confidential. GO TO P1A

P1a) Do we have your permission to provide your first name and profile?

Yes	1	GO TO P2
No	2	THANK & TERMINATE

P2) A recording of the interview will be produced for research purposes. The recordings will be only used by the research professional to assist in preparing a report on the research findings. Be assured that your comments and responses will not be attributed to you in any reporting and that your name will not be included in the research report.

Do you agree to be recorded for research and reporting purposes only?

Yes	1	THANK & GO TO **INIVTATION**
No	2	READ EXPLANATION BELOW; GO TO P2A

It is necessary for the research process for us to record the session as the researchers need this material to complete the report.

P2a) Do we have your permission for recording?

Yes	1	THANK & GO TO **INVITATION**
No	2	THANK & TERMINATE

INVITATION

Thank you so much for answering these questions.

We would like to invite you to take part in the interview. The session will last between 30 to 45 minutes. After the session, we would send you **$200** in appreciation for your participation.

During the interview, you will be asked to expand on your views with respect to the service and support that the TCS provides to Canadian businesses like yours, as well as how your organization is operating within the context of the current economic environment. Following the interview, we will provide you with $200 as thanks for participating.

We remind you that your participation in the interviews is confidential. Abacus does not share any information that could identify you or your business with the TCS, GAC or any other third party at any point during or after the research is completed. You will be able to view the full research report through Library and Archives Canada no later than six months after the research is completed.

Please click on the link below, you will be able to schedule an appointment with one of our Abacus senior researchers and you will be sent a videoconference link.

[LINK]

The next steps are as follows:

If at any moment, you realize that you are unable to make it to the interview, please send us an email and we will attempt to find a replacement. Note that you cannot send another person in your place.

We ask that you login a few minutes before the session to be sure you are able to connect and to test your sound (speaker and microphone).

As we are only inviting a small number of people, your participation is very important to us. We thank you for participating in this study.

Thank you and we look forward to our interview with you.

FOR BUSINESS CLIENTS ONLY (NOT PARTNERS)

Regarding the incentive payment, would you like to receive the incentive by check or e-transfer?

E-transfer 1
Check 2

E-TRANSFER: We will send the e-transfer to the email address you have given us. Just to confirm the payment will go to:

<Recalled name and E-Mail> Is this correct? (Please allow 1-2 week for arrival after the group session.)

Yes, it is correct 1
No. This is not correct (ENTER CORRECTED INFORMATION) 2

CHECK: Please confirm your full name and mailing address so that we can send you the check once you have completed the session. (Please allow 2-3 weeks for arrival after the group session.)

First Name: ______________________________________
Last Name: ______________________________________
Address: ______________________________________
City: ______________________________________
Province: ______________________________________
Postal Code: ______________________________________

D. Qualitative Interview Guide

Background and Research Objectives (not read to respondents)

The Trade Commissioner Service (TCS) has been conducting client satisfaction research since 1999, adding a qualitative component to the last three waves of research. To measure the evolution of TCS client satisfaction and identify areas where TCS services are of best fit, GAC would like to conduct the next iteration of qualitative and quantitative research with its clients.

The Government of Canada's Export Diversification Strategy has maintained a strong emphasis on trade and export diversification. By using a combination of qualitative and quantitative methodologies, this research will provide an opportunity to gauge client attitudes towards achieving this goal, in addition to measuring overall client satisfaction with TCS performance.

The overall purpose of the 2025 research is to gauge progress since 2024 and provide a targeted read on satisfaction, service standards, and the contribution of TCS to client outcomes among past respondents. The qualitative research is being undertaken with the objectives of: understanding client needs within the current global business context, including the impact of the disruption in the global economic environment specifically as it relates to jobs and market diversification; and detailing client perceptions of TCS services and measuring the effectiveness and relevance of TCS services to their realities.

CLIENT NOTE: PLEASE NOTE THAT THIS IS *NOT* A QUESTIONNAIRE AND QUESTIONS ARE NOT READ VERBATIM. THE GREATEST INSIGHT WILL COME IN THE FORM OF AN INFORMAL CONVERSATION, WHICH BROACHES ALL OF THE TOPICS IN THIS GUIDE.

1.Introduction (5 minutes)

Hello, my name is____________ with Abacus Data Inc. Global Affairs Canada (GAC) has commissioned Abacus to conduct a series of interviews with representatives of Canadian clients and partners who received service from the Canadian Trade Commissioner Service (TCS) between (Confirm dates). This research will help GAC better understand the needs and challenges faced by Canadian companies seeking to do business internationally, including 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 (edited to remove any situations which may serve as identifiers) of the interview may also be made available to the TCS.

I would like to stress that you are free to offer your open and honest opinions and feedback concerning your dealings with the TCS. There are no right or wrong answers. This is not a knowledge test, and you will not be penalized based on the thoughts and opinions you share. Finally, as a reminder, the report can be accessed through the Library of Parliament or Archives Canada in about six to eight months and your responses will in no way affect your dealings with the Government of Canada.

2.Company Background (5 minutes)

CLIENT NOTE: INTERVIEWER WILL HAVE RESPONDENTS' SURVEY RESULTS FOR REFERENCE AND PROBING AND QUESTIONS WILL BE ADAPTED/CUSTOMIZED TO PROBE SPECIFIC RESPONSES.

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?
    - How have these evolved over the last few years?
    - Have you entered any new (foreign) markets over the last couple of years?

3. Experience and Relationship with the TCS (15 minutes)

- I would like to understand your history with the TCS:
    - How long has your company been working with the TCS? And you personally (if different)?
    - Can you explain how you began working with them in the first place?
    - Through what channel(s) (email, in-person, video-call, social media), do you typically interact with the TCS. What do you prefer and why?
    - How would you characterize your overall relationship with the TCS, has it changed over time

FOR RESPONDENTS WORKING IN MULTIPLE MARKETS

- Taking into account the different business contexts and economic realities in the different countries where you do business, would you say the TCS strives to provide an appropriate level of service? How do you think they could do better in that respect?

4. Business Challenges (15-20 minutes)

I'd now like to discuss how your organization is dealing with the significant changes in our and the global economic environment that have taken place over the past year or so.

- Has the change in the US and Canadian governments earlier this year impacted your business? **IF YES**:
  - Please elaborate, e.g. capital investment, jobs, etc.

IF TARIFFS NOT MENTIONED ASK:

- Have the tariffs or other policies imposed by the US government impacted your business? **IF YES, PROBE**:
  - In what ways?
    - Is your organization planning (or has it) pulled back from the US market? If so, to what extent?
    - What have been the main challenges that this environment has created?
  - What steps has your organization undertaken to mitigate the tariffs?
  - If export to the US:
    - Do you know if your products or services that you sell into the US are CUSMA compliant?
    - If compliant: has your organization completed the paperwork/documentation to seek tariff relief under CUSMA? If not, why not?

- Given the change in the economic landscape:
  - Have you made adjustments to your staffing levels (i.e. reductions, unchanged, hiring) since the beginning of the year? Why these changes?
  - What would be your best guess for the next 6-12 months? Do you expect to reduce, hire or remain steady in terms of staffing? What are the reasons for this?
    - If expecting changes in staffing: what areas would you expect to be hiring/reducing?

- Is your organization actively looking to diversify the markets it sells into? Why/why not?
  - **IF YES**: which markets, and why those?
    - How do you decide what markets show potential for your business?
    - Where do you get information from about potential new markets?
    - What time frame are you looking at to enter into these markets (months, years)?
    - What actions are you taking (or planning to take) to explore/enter these markets?
    - What types of services or support could the TCS potentially offer that would be of value to you?

- Apart from what we just talked about, what would you describe as other major challenges you face in doing business internationally? **PROBES**
    - The value of the Canadian dollar
    - Inflation/rising cost of inputs
    - Canadian export taxes or permits
    - Uncertainty of regulatory requirements in other countries
    - Known foreign tariffs or trade barriers
    - Discriminatory or arbitrary treatment toward Canadian investors or their investments
    - Lack of access to financing or funding
    - Concern of violation of your patents and/or intellectual property rights
    - Linguistic or cultural obstacles
    - Labor availability and skills
    - Corruption
    - Lack of information about international business opportunities
    - Lack of market contacts such as potential buyers and partners, technology sources, agents, etc.
    - Supply chain issues or disruptions
    - Unfair or biased treatment in foreign markets

5. The TCS Brand (5 minutes)

- 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?

- Do you have a good understanding of the services and support provided by the TCS as described by TCS social media and website?
    - How could the TCS could do a better job of providing information or services to business people like yourself? **PROBE.**

- What would you say the TCS did/does particularly well when helping businesses like yours do business abroad? If you were talking to a business associate or colleague, what would you tell them about your experience.

- If the TCS were to offer digital services, how likely would you be inclined to register and use these services? What content is of most interest to your business? **PROBES**:

- Notifications on new opportunities such as events in your sector and markets of interest
- business leads
- sector/ market reports
- market entry requirements
- niche market intelligence
- government policies
- in-market news

6. Conclusion

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?

Thank Participant and Adjourn

Total Time (MAX): 45 minutes