



TRADE ROUTES CLIENT SATISFACTION SURVEY RESULTS

Background

In the fall of 2007, the Department of Canadian Heritage commissioned Phoenix Strategic Perspectives Inc. to conduct a client satisfaction survey for the Trade Routes program. This survey was designed to determine clients' level of satisfaction with the four program components: Market Entry Support, In-Market Assistance, Contributions and Research. A list of potential respondents was created using both the Trade Routes client listing and the Virtual Trade Commissioner. Invitations were sent to potential respondents in all regions of Canada, and to all cultural sectors. The survey was available online from October 17 to November 16, 2007, with mail-out surveys sent to those who did not have access to the Internet. In total, there were 733 respondents: 201 current clients (those who have used Trade Routes services within the past 12 months), and 532 non-clients (former clients and non-clients that have businesses in the arts and cultural sector).

Many of the clients listed by Trade Routes as potential respondents identified themselves as "non-clients" when filling in the survey. These respondents were likely unaware of their "client" status due to Trade Routes' seamless approach to service delivery, which involves some of the program's services being delivered by staff working out of the Department of Foreign Affairs and International Trade's (DFAIT) regional offices and at Canadian missions abroad. These clients may not have been aware that the services they received were, in fact, coming from the Trade Routes program, and subsequently identified themselves as "non-clients". As a result, the sample size of clients surveyed is quite small (201 respondents). However, many of the "non-clients" surveyed were former Trade Routes clients (120 respondents), who had previously used the

program's services but did not qualify as a current client because their use of the program did not fall within the past 12 months. When these respondents are taken into account, the overall number of Trade Routes clients (past and present) increases to 321 respondents – a more solid sample.

Results

This section highlights key results for each of the four program components:

Contributions

Description

The Trade Routes Contributions Program provides financial support to organizations in the arts and cultural sector in order to assist with export preparedness and international market development.

Highlights - Contributions

- The Contributions Program was the most familiar component for clients, and the most likely to be used.
- Clients were far more interested in receiving assistance with international market development than export preparedness (93% vs. 31%).
- 61% of clients were at least moderately satisfied with the quality of service they received, with staff courteousness and staff knowledge/competence ranking high.
- 58% of clients were dissatisfied with the timeliness of the approval process.
- 28% of clients experienced problems with the program and cited delays and timeliness issues as the most common problem.
- Suggested changes to the program included: earlier notification for the outcome of applications (73%), online applications (49%), and an approval-in-principle system (43%).

Market Entry Support

Description

Market Entry Support provides direct support to arts and cultural clients from both PCH headquarters (Gatineau) and Department of Foreign Affairs and International Trade (DFAIT) regional offices (Vancouver, Winnipeg, Toronto, Montreal, Moncton, Halifax and St. John's). The Trade Routes Cultural Trade Commissioners (CTCs) provide services to clients with a focus on export preparedness and international market development, and help with skills development and export counseling.

Highlights – Market Entry Support

- Market Entry Support was the second most familiar component of Trade Routes.
- Clients were most likely to use the offices at headquarters, Montreal and Toronto for service.
- 68% of clients were satisfied with the overall quality of service that they received, with high rating for staff knowledge/competence and ease of access to service.
- 75% of clients were satisfied with the timeliness of service. However, it was the most common issue identified by the 12% of clients who had experienced problems in the past year.
- One-third of clients felt that the number of CTCs should be expanded, with Calgary being the most frequently suggested city (45%), followed by other cities in Western Canada.

In-Market Assistance

Description

The In-Market Assistance component offers services to arts and cultural exporters from five key sites around the world (Shanghai, New York, Los Angeles, Paris and London). Five Cultural Trade Development Officers (CTDOs), one per site, develop and implement strategies and deliver services to promote Canadian cultural goods and services. They conduct outreach activities and connect with potential partners for Canada's arts and cultural sectors. They work with Canadians interested in exporting to specific markets, and with local partners interested in Canadian contacts.

Highlights – In-Market Assistance

- Clients were most likely to have used the New York office, followed closely by the offices in Shanghai, Los Angeles, and London.
- The office in Paris was the least likely to be used.
- 73% of clients were satisfied with the overall quality of service, with 43% of clients being *very* satisfied.
- 70% of clients were satisfied with the timeliness of service.
- For the 20% of clients who experienced problems, accessing a Cultural Trade Development Officer (CTDO) was the most common issue.
- The majority of clients felt that the number of CTDOs should be expanded. The most frequently suggested cities included Berlin, Tokyo and Sao Paulo.

Research

Description

The Research component supports targeted studies of specific markets and countries, including surveys and profiles of export patterns for Canadian cultural sectors, and the development of statistical data on Canadian cultural exporters and cultural trade.

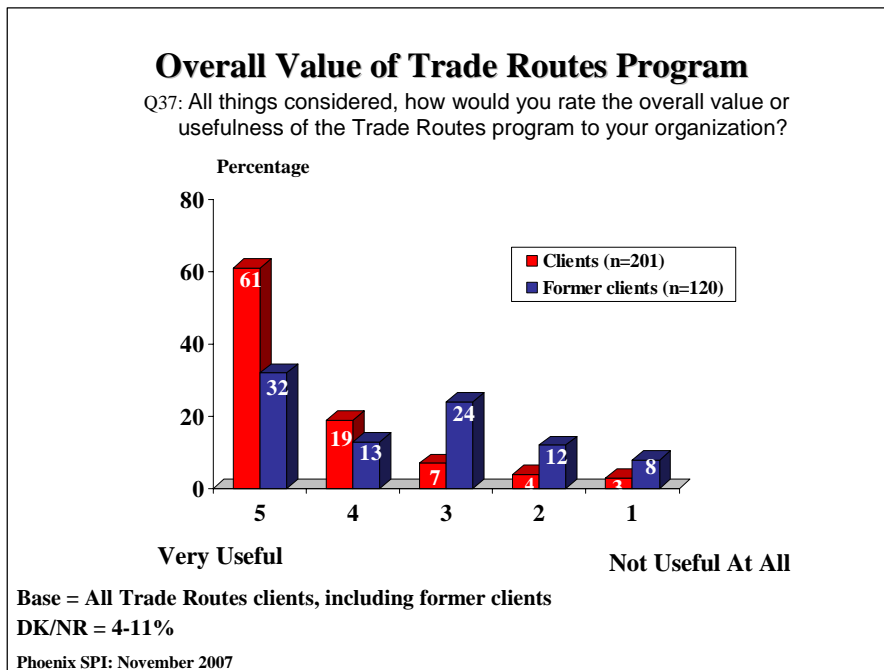
Highlights - Research

- Only 39% of clients had an awareness of Trade Routes research.
- 52% of clients expressed satisfaction with this component of the program, while 34% felt neutral.
- Clients were most likely to be satisfied with clarity and accessibility of the research, followed closely by its relevance.
- The lowest level of satisfaction was related to comprehensiveness (46%).
- 70% of clients suggested market reports by cultural sector as a new direction for research.

Non-Clients

Familiarity with the Trade Routes program was very limited for non-client respondents, with 71% having no more than a little knowledge of the program. However, 63% said that they were at least aware of the program's existence.

Of the non-clients surveyed, 29% were former clients. Assessments of the overall value of Trade Routes given by these individuals are mixed, particularly when compared to the responses of clients.



In total, 45% rated the program as valuable or useful to them, while 24% were neutral. The most commonly perceived impacts of the program were building networks and partnerships (70%) and developing international markets (69%). Overall, 75% of former clients were moderately likely to use the program again, with 47% saying they would be very likely.

Conclusion

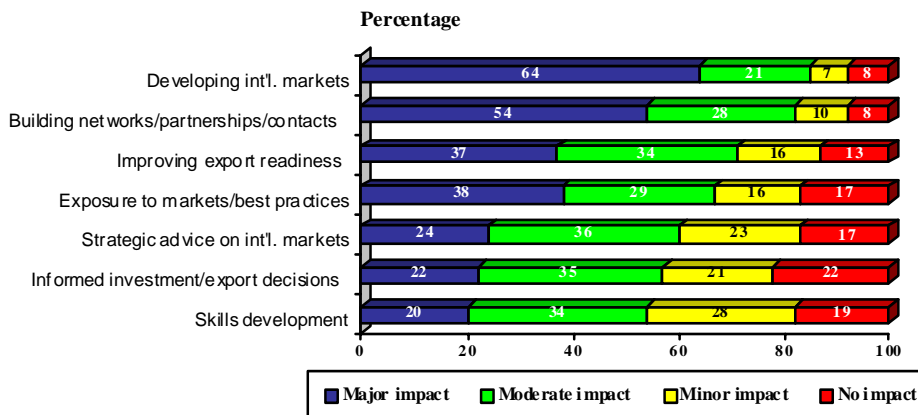
Overall, clients were moderately familiar with the four program components, with the highest rating going to the Contributions Program, followed by Market Entry Support, In-Market Assistance and Research, respectively. Satisfaction was high for the overall quality of service clients received, particularly in terms of staff courteousness, staff knowledge, fair treatment, and being served in their preferred language. Clients also showed a clear preference for in-person service as opposed to more generic channels, such as the toll-free telephone number or generic email.

Value and Impact

- 80% of clients rated the program as valuable or useful to their organization.
- Clients felt Trade Routes has the most impact when it comes to:
 - developing international markets (85%)
 - building networks & partnerships (82%)
 - assisting with export readiness (71%).
- 91% of clients said that they are at least moderately likely to use the program again, while 78% would be *very* likely.

Impact of Trade Routes on Organization

Q38. Please rate the impact of the Trade Routes program on your organization in each of the following areas.



Base = 164-190; Trade Routes clients

NA removed = 6-18%

Phoenix SPI: November 2007

A large majority of respondents felt that Trade Routes is valuable to their organization, demonstrating that the strength of the program lies in its overall impact. Many felt that Trade Routes had at least a moderate impact on their organization in all of the areas examined, with many attributing a *big* impact to the program, particularly in the area of developing international markets and building networks, partnerships and contacts. In addition, almost all current clients said they would use the program again in the future, with more than three-quarters describing this as *very* likely.

The program would like to thank everyone who took the time to respond to the survey. The feedback received will be used to underline key areas that need to be looked at, and will help guide Trade Routes in their continuing effort to improve the quality of service provided, as well as during program renewal.

**A more in-depth analysis of the survey results is available
on the Library and Archives website:**

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/canadian_heritage/2008/155-07-e/report.pdf

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