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DEPARTMENT OF FOREIGN AFFAIRS
AND
INTERNATIONAL TRADE
Evaluation of the GMOR Series

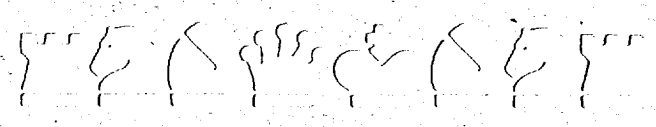
June 2, 1994

Dept. of External Affairs
Min. des Affaires extérieures

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EXECUTIVE SUMMARY

- ❖ This research assessed the current information needs of exporters and evaluated their reaction to the GMORs available in their sector. The purpose of the research was to upgrade the quality and utility of information provided to the exporting community throughout the GMOR series.
- ❖ The objectives included examining the usefulness of the publication, information requirements, alternate publishing options, editorial and design considerations.
- ❖ The target group was defined as persons in charge of export sales. This often meant the owner or a senior manager.
- ❖ The following publications were tested:
 - . Aircraft Repair and Overhaul
 - . Apparel
 - . Lobster
 - . Fish and Seafood
 - . Packaging and Labelling Equipment
 - . Pork
- ❖ Research used a combination of focus groups, interviews and a teleconference.
- ❖ The research found that few participants were aware of the GMOR prior to its evaluation. The exception was exporters of pork who had a direct hand in its development.
- ❖ Information most valued by exporters was market intelligence, demographics and transactional information.
- ❖ Many participants identified a critical need for accurate lists of contacts and buyers in future editions. Timely information is crucial because markets change so quickly. Information was seen to have a short shelf-life – turn around time was important.
- ❖ Although the perception of each GMOR varied depending on its target audience, in general, participants wanted even more information related to market intelligence, market demographics and sales opportunities.

-
- ❖ Experienced exporters already relied on their own sources of information. They tended to find the GMORs to be not as useful as their own contacts.
 - ❖ Participants are divided on the ideal format for the GMORs, but for many it would exist in a database that they may access on-line at the time of their choosing. However, there would be some demand for hard copy.
 - ❖ Participants generally considered the U.S. market to be the most important. Many believed that there were emerging markets in Mexico, Latin America, South America and the Pacific rim. However, participants said they would export wherever there was an opportunity to make a sale.
 - ❖ The discussions identified a need for improved editing in future GMORs.
 - ❖ Participants had few comments on design because they were more interested in content. However, the groups identified some design elements (contained herein) that the Department should consider to improve the attractiveness of the GMORs.
 - ❖ With the exception of the pork exporters, many participants were not aware of the Departmental-association cooperation in the development of the GMORs. As a result, many participants recommended that the Department coordinate efforts with the associations in order to better service the industry.
 - ❖ Few participants endorsed the suggestion of having advertising or sponsorship. However, if the information was perceived to have value, it would not pose a problem.
 - ❖ Most participants would pay a nominal fee just to make sure they covered the base with this information.
 - ❖ In their current format, GMORs are more useful to novice exporters.
 - ❖ The Country Guides for the Fish and Seafood sector were very well received.

1.0

INTRODUCTION

1.1 Background

For the purposes of this report, the Department of Foreign Affairs and International Trade (DFAIT) is referred to as the "Department." DFAIT has a three step approach to the collection and dissemination of trade development information. It consists of the following three initiatives:

- ❖ Capability Guides and Directories provide information on Canadian exporters for foreign posts.
- ❖ Global Market Opportunities Reviews (GMORs) provide information for Canadian exporters on foreign markets.
- ❖ Action Plans / Sector Strategies provide information for Canadian exporters on government-wide initiatives to support exports.

The second part of this three-step approach, the GMOR series, was created to fill the needs of individual sectors of the economy for sector-specific information on foreign markets. The GMORs were developed with information collected from the missions by questionnaires that were developed in cooperation and consultation with the respective industry associations. The resulting reports contain information such as market size, growth areas, distribution channels, government contacts and other information of interest to exporters.

The Department wanted to assess current information needs of exporters and evaluate the reaction of exporters in selected sectors to the GMORs already available. The purpose of the research was to upgrade the quality and utility of information provided to the exporting community throughout the GMOR series.

1.2 Methodology

Research Objectives

- ❖ Assess the needs of exporters for different types of information.
- ❖ Evaluate the objectives and the concept of the GMOR series.
- ❖ Assess the current usefulness of the publications.
- ❖ Determine future information requirements for the GMOR series.
- ❖ Determine if there are alternate publication options.
- ❖ Determine exporters editorial and design preferences.

Target Group

The target group was defined as persons working in companies, in specific GMOR sectors who were in charge of export sales. For smaller companies they were identified as the owner. For larger companies they were identified as the owner or senior manager.

GMORs Tested

The following GMORs were tested (in alphabetical order):

- ❖ Aircraft Repair and Overhaul ¹
- ❖ Apparel
- ❖ Lobster
- ❖ Fish and Seafood
- ❖ Packaging and Labelling Equipment ¹
- ❖ Pork

The evaluation of the Fish and Seafood GMOR also included the Sourcing Guide and the Country Profile for Hong Kong and United Kingdom.

Research Logistics

The evaluation took the form of multiple research lines of inquiry. Focus groups, interviews and a teleconference served as the research tools. Annex A depicts the research logistics.

A screener and a moderator's guide was developed and approved by the Department. These are included as annex B and C respectively.

¹ Aircraft Repair and Overhaul and Packaging and Labelling Sector were developed as export strategies and not as GMORs.

Potential participants were recruited from lists provided by the Department and supplemented when necessary, by information that was available in the region. Participants were recruited with the objective of obtaining a balance of representatives from large and small companies.

Participants were selected from lists of active exporting companies that are contained in the capability guides. The sampling frame of companies included a disproportionate number of large and more experienced exporters.

The moderator's guide was developed based on the objectives as established in the scope of work. Each group began with an introduction of the moderator, an explanation of the purpose of the research, an outline of where the GMOR series fit in and some of the ground rules for focus groups.

Participant Profile

It is important to understand the perception, motivations and behaviour of the participants because understanding them explains much of their attitudes towards the GMOR. Participants were typically male, had years of experience, were knowledgeable about the industry and were generally high ranking in the company. They believed themselves to be action and results-oriented.

In addition, these participants make it their business to know the markets. They keep abreast of events on a daily basis. As such, they readily detect dated and inaccurate information.

2.0

GLOBAL FINDINGS

2.1 Overall Impressions

Awareness

Few participants were aware of the GMORs prior to this evaluation (the exception being the Pork participants who had a major hand in the development of the GMOR through Canada Pork International). A few participants had seen previous iterations. Many other participants thought they had seen something similar that may have been faxed to them.

Value

Participants appeared to have an information value hierarchy. The most highly valued information was market intelligence such as the names of contacts or potential buyers in the foreign country. On the other end of the scale was the theoretical and "state of the sector" information that participants did not find very useful for exporting purposes.

Many of the participants in the groups were already heavily exporting. As such, many participants noted they had more and better information through their sources than was contained in the GMOR. What information they did not have could be obtained quickly through a key contact. They naturally concluded that the GMOR would be useful for novice exporters.

However, the Country Guides (presented in the Fish and Seafood focus groups) were more highly valued. The information contained in them were perceived to be of higher value added for their potential in providing advice in a marketing strategy.

GMOR Sector Difference

There appeared to be a sector by sector difference in attitudes towards the GMORs. These differences were:

- ❖ consumer market (Lobster) vs. an industrial market (Packaging and Labelling)

-
- ❖ lower volume/high dollar value (Aircraft Repair and Overhaul) vs. higher volume/low dollar value sectors (Fish and Seafood)

The consumer and high volume/low dollar value sectors (Lobster, Fish and Seafood and Apparel) tended to be more critical of the GMOR and government involvement in general. The industrial market (Aircraft Repair and Overhaul and Packaging and Labelling Equipment) tended to be less critical of the GMOR and more readily welcomed some form of government involvement.

Timeliness of Information

Many participants felt that the GMOR tested was out of date. Although there were some extreme examples (e.g., a listing of trade fairs already finished), many felt that even a six month old GMOR might be dated for them.

Timeliness was very crucial for exporters because the market changes so quickly. This reinforces their value of market intelligence information. However, this information has a very short shelf life.

Inaccuracies

If the datedness of the content had participants questioning the relevance of the GMOR, the inaccuracies in many of them appeared to damage the credibility of the publications. One example was the distributor in Chicago who had been dead for several years and yet was still listed in the GMOR.

2.2 Export Snapshot

"Exports are becoming a bigger and bigger part of my business every day and we are looking for more and more markets around the world every day. The issue is once you've learned how to do business in one country it gets easier and easier. At first there are surprises." – a focus group member.

Participants felt that exports were more driven by opportunity than by an overall strategy. Often, an exporter would simply choose to enter a market only because a sale could be made.

There was not necessarily a conscious decision to penetrate a country on speculation. Often the genesis of exports was a hard opportunity. Familiarity with the country helped.

"One rarely says I am going after the Pacific Northwest. More likely you see the retailers in the market and you go after it."

Given that export markets were driven by hard opportunity and familiarity, it came as no surprise that the U.S. market was considered to be the most important one for all sectors. This was due to a number of factors including common language, familiarity, size of the market, proximity and relative ease of entry. In fact, the Fish and Seafood participants said they treated the U.S. like a domestic market.

However, many participants noted that the markets in Mexico, Latin America, South America and the Pacific rim were of great interest as well. Many participants considered them to be an emerging market that might be more receptive to Canadian products than other traditional global markets like Europe. Many participants felt that more information on this geographic area in the GMORs would be useful.

All of the sectors agreed that the Canadian market was not big enough to support them. Many felt the Canadian market was either static or shrinking. Participants agreed that exports are a substantial part of business. They believed that they must export to grow. For some (e.g., Fish and Seafood and Lobster), they must export to survive.

2.3 Departmental Role

In general, participants saw the role of the Department as making exports easier for their industry. Many participants saw this as tackling trade barriers. For the pork industry, it meant harmonizing inspections; for the apparel and aircraft repair and overhaul industries, it meant doing something about the delays in cross-border shipments.

Many participants recognized and supported the Department in organizing trade missions and trade fairs. For many of them (e.g., Packaging and Labelling Equipment) this was their primary source of export information.

Many participants felt that another departmental role was the gathering and disseminating of trade information. However, it quickly became apparent in many groups that dissemination of information was not the Department's strong suit. One person summed the Department up by

saying "they do a terrific job in certain areas, but in the dissemination of information they are a little weak."

There was recognition of the value of Trade Consulates and many participants could name appropriate contacts. However, this knowledge was not widespread. For example, many participants in the Winnipeg apparel group did not know there was a trade office there. Many participants felt that the GMORs should, as a minimum, contain embassy and/or trade consulate lists.

2.4 Content

This research discovered a large amount of information desired by exporters. The most highly-prized information was **market intelligence**, defined by DFAIT as "*up to the minute information on specific projects, which will help businesses to implement their strategies and win new business.*" Some participants mentioned that all they were looking for from the Department was contacts. As one person said "*just give me six pages of names, I'll take it from there.*"

Many participants concluded that much of the information was too general to be of use. Even when distributors and importers were outlined, many participants (most notably the Aircraft Repair and Overhaul and Packaging and Labelling Equipment) felt that the information would be of better use if the lists had details on what product lines they specialized in.

Table 1 depicts the main categories of information desired by exporters.

Table 1

(In rough descending order of importance)

Information Category	Perceived usefulness
Market intelligence	Most useful
Demographics	Moderately useful
Transactional	Moderately useful
Market trends	Moderately useful
Theoretical	Not very useful
Background	Not very useful

Market Intelligence

The following information is considered market intelligence for the purposes of this report. Not all information applies to each GMOR sector. For detailed information on categories, refer to each GMOR review (section 3.0).

- ❖ direct leads (contract or procurement authority and what is being requested);
- ❖ names of distributors, importers, retailers, sales representatives (broken down by product line);
- ❖ competitor information; and,
- ❖ miscellaneous intelligence information (e.g., budgets).

Market Demographics

The following information is considered market demographics for the purposes of this report. Not all information applies to each GMOR sector. For detailed information on the categories, refer to each GMOR review (section 3.0).

Market demographics was defined as:

- ❖ market size;
- ❖ cultural and customs information;
- ❖ retail philosophy;
- ❖ location of the centres of excellence;
- ❖ domestic capability and demand;
- ❖ retail base strength; and,
- ❖ transportation infrastructure;

Transactional Information

The following information is considered transactional information for the purposes of this report. Not all information applies to each GMOR sector. For detailed information on these categories, refer to each GMOR review (section 3.0). Transactional information was defined as:

- ❖ foreign credit terms;
- ❖ business and financial culture;
- ❖ information on duties, tariffs and other restrictions;
- ❖ sales tax information;
- ❖ banking infrastructure;
- ❖ trade fairs listings;
- ❖ government contacts, consulate listings; and,
- ❖ information on assistance programs;

Market Trends

The following information is considered market trend information for the purposes of this report. Not all information applies to each GMOR sector. For detailed information on the categories, refer to each GMOR review (section 3.0). Market trend information was defined as:

- ❖ customer preferences;
- ❖ holidays;
- ❖ seasonal consumption patterns; and,
- ❖ peak seasons.

Other Sources of Information

All participants could name other sources of information at their disposal that was more valuable than the GMOR. Some of this information came from the industry associations. Many participants recommended that the Department consider coordinating efforts with the associations in order to better service the industry.

2.5 Editorial Considerations

Given the very nature of this subject, it is difficult to come to any global finding. This is especially so because the GMORs differed from each other so much. As such detailed editorial analysis accompanies each sector analysis.

In general, future editions of the GMOR series should be edited by a person not familiar with the content and not necessarily familiar with the industry. Although users would tend to hunt and peck their way through the document instead of reading it from cover to cover, it should be noted that the material is laborious to read (please see design considerations).

2.6 Design Considerations

Owing to the wide variation in the design of the GMORs tested, it is difficult to generalize about the design of all of the GMORs. Each GMOR is evaluated for design considerations separately.

Participants rarely commented on design, preferring instead to concentrate on what they were more familiar with, that is, the content of the GMOR. However, the following observations are made:

- ❖ The GMORs have an inconsistent look in cover design and content across all sectors.
- ❖ Some GMORs do not have the Canada Wordmark and Departmental signature.
- ❖ No GMOR mentions the availability of the publication in the other official language.
- ❖ Type size and fonts vary across all GMORs.

-
- ❖ The page numbers are inconsistently applied and the quality of the Table of Contents varies from GMOR to GMOR.
 - ❖ Some sections, headings and sub-headings are not clearly distinguishable.
 - ❖ Some tables are difficult to read.

2.7 Marketing and Promotion

Participants did not endorse the concept of allowing private advertising or sponsorship in the GMORs. Many believed it would bring the objective of the GMOR into question.

Estimates of an acceptable price for a GMOR varied widely between groups. The price that would be acceptable was related to the perceived value-added of the publication. A nominal fee of anywhere from \$10 to \$50 would be about right; however, the price could be higher if the information contained in the GMOR was perceived to have a higher value.

2.8 Publishing Options

Participants were generally more concerned about how useful the information would be rather than how to access it. As timeliness was considered to be of critical importance, many participants could not envision highly valued market intelligence information in the current print format. They recommended that the information be updated quickly and have greater accessibility. There was general agreement that on-line access would enhance the timeliness of the information.

Although electronic access was widely endorsed, it was not unanimous. Participants acknowledged that publishing flexibility had to be built in to the process because electronic access would not suit everyone. For those who could not access the information in that manner, they suggested that a phone call and a fax might suffice.

The "higher tech" sectors such as aircraft repair and overhaul and packaging and labelling equipment, were generally more inclined to want to access information on-line. However, attitudes towards on-line access was more related to how technically-oriented companies were rather than by what sector they were in. For example, although many apparel manufacturers wanted only hard copy information, some of them felt that on-line access was

the only way to go.

The majority attitude was summed up by one focus group participant who said *"alternatives should be available in a paperless society. This means one should be able to publish this more often. If the format does not change, then (one) can just update the statistics."*

3.0

DETAILED GMOR EVALUATIONS

3.1 Aircraft Repair and Overhaul

The findings in this section are based on the results of focus group and interview research. The term "participants" describes respondents from both methodologies.

Purpose of the publication

To focus and enhance trade development support for the aircraft repair and overhaul industry.

Overall Impressions

Participants acknowledged and appreciated the effort by the Department to provide the industry with information that could help facilitate their exports. An indication of the usefulness with which they viewed this publication was that many wondered why they had not received this publication before.

There was a general consensus that the information in the GMOR² was very useful although participants found the publication difficult to read.

Participants particularly liked the detailed information on each country. However, there was acknowledgement that if one was already exporting, one was already aware of this information. It was felt that this may be of more interest to smaller and medium sized companies because the larger companies have their own database. Participants believed that the publication must have been written by a person knowledgeable of the industry.

Export snapshot

Some participants noted that the Canadian market was small and static. For most participants, exports represented the lion's share of their business. Many felt it was growing in importance.

In terms of export markets, participants mentioned they were exporting world-wide. However, the U.S. market appeared to dominate. Joint ventures were common. This seems to

² The Aircraft Repair and Overhaul Sector was developed as an export strategy and not as a GMOR.

suggest that the Department should consider adding more detailed information on the U.S. market and to reinforce the industry contention that joint ventures are often a necessary pre-condition to exporting in many countries.

Departmental Role

Participants recognized the value of the trade consulates and foreign offices. Many had used them to gather market intelligence. They would like to see more information coming from the embassies and consulates because it would allow smaller companies to have more access. Participants felt that the Department could work better with the associations to help coordinate and distribute market intelligence information.

In terms of other roles, participants noted that the Department helped organize trade missions. Another participant noted that the government could best help by facilitating products crossing the border. There was invariably a three to four day delay at the border. There may not be a role for the Department in this area, but the information may be useful to other departments of the federal government

Content

Participants agreed that the information most valued was the lists of long term contracts and who was contracting. As one participant noted, "*as a small company, we do not have the manpower to seek out these opportunities.*"

Participants acknowledged that useful sections included the following:

- ❖ inventories of aircraft (annex A);
- ❖ the country guides and the updated listing of trade shows in annex G; and,
- ❖ the executive summary (but many of the points or assertions were challenged.).

Participants liked the categories broken down by product line e.g., avionic upgrades, components repair/overhaul. They wanted to see more of the following information:

- ❖ contacts (names, addresses and telephone numbers);

-
- ❖ more information on who is buying and what they are buying;
 - ❖ more intelligence information (e.g., if money for defence is cut, it usually stimulates demand for repair and overhaul);
 - ❖ where are the aerospace centres of excellence broken down by product line (e.g., where is the machine work done, how are the fleets distributed, where are the helicopters concentrated);
 - ❖ what are the aerospace applications (e.g., forestry) and where are they located;
 - ❖ what is the current product line;
 - ❖ dollar volume in repair and overhaul;
 - ❖ current capability in repair and overhaul;
 - ❖ information on the competitors in the export market;
 - ❖ age of fleets and trends; and,
 - ❖ a brief description of assistance programs and grants.

Editorial Considerations

In general, participants felt the publication was difficult to read because sections were ill-defined and roughly laid out. However, many acknowledged that the important point was the content and not the style.

The amount of technical information posed no difficulty for participants. They felt it might be more difficult for laymen.

Many participants questioned why "recommendations" were part of the publication. They suggested minimizing acronyms.

Many participants noted the information was dated. As one person said, the "*upcoming events have past.*"

Design Considerations

Comments were few and far between; some participants felt the design of the GMOR could be improved to enhance its readability.³

Marketing and Promotion

Participants felt inundated with publications of lists of suppliers in their industry. Many of the requests for information came from the Federal Government (participants were not sure which department). They felt that it would be of great benefit to the industry if the Federal Government could coordinate its activities in this area.

Participants felt that the aircraft repair and overhaul sectors can best be marketed in a "Team Canada" approach. They noted that often a joint venture in a foreign country was the only means by which they could secure the business. As such, they felt that all marketing and promotional material should have that as its central theme. This suggests that future publications should emphasize the importance of team-work and joint ventures in this industry.

Participants thought it better that the Department work in concert with the industry association (such as AIAC).

Participants felt it was extremely important to ensure that any Departmental publication was comprehensive in naming Canadian suppliers that had expertise in the specific sector that was being covered.

Participants felt that the aircraft repair and overhaul sourcing publication (not part of this evaluation) was an important element of Canada's marketing mix in this industry.

Other sources of information were the World Aviation Directory, The Forecast Book and Jane's.

³ Participants comments on this section were light or non-existent. However, advice is provided, based on the previous experience of Larry Johnson Communications, under separate cover.

Most participants would be willing to pay a nominal fee although a minority of participants, felt, on principle, that the government should be promoting the industry not charging for it.

Publishing Options

Participants felt that a premium must be placed on providing market intelligence information to industry in a timely manner. This precluded the possibility of having it published in its existing format since it could not be timely.

Most participants were less concerned about how the information was presented and more concerned about getting the information in time for them to use it. They suggested the Department consider alternate ways of reaching them with market intelligence information. They suggested electronic databases with access through on-line or faxes as required. As well, they noted that there was no systematic way for Canadian suppliers to transfer market intelligence information that they happen to come upon. They felt the Department had a clearing-house role.

3.2 Apparel

The findings in this section are based on the results of two focus groups.

Purpose of the publication

To provide global market data obtained from Canadian Embassies, Consulates and Trade Missions around the world on apparel for men, women and children.

Overall Impressions

The attitudes and perception towards the Apparel GMOR differed markedly between the group in Winnipeg and the group in Montreal. The Winnipeg group felt the federal government was better placed to continue negotiating trade agreements and to leave the publication of information on export markets to the private sector. The Montreal group was generally more positive and disposed towards continued federal government involvement.

Most of the participants in both groups were unaware of this publication prior to its evaluation in this exercise.

There were many comments on the "costs" of the publication in the Winnipeg group. This did not appear to be a major concern of the Montreal group.

Export Snapshot

The group agreed that exports are "*a must*" for their industry. This was in part due to the shrinking of the domestic market. The Montreal group, in particular, noted that every day there seemed to be another Canadian retailer going under.

The U.S. market was acknowledged as the most important for a number of reasons. This included its proximity, language, size and the fact that all parts of the country had the same customs and duties. However, many participants noted that the U.S. market was not necessarily homogeneous. For example, they believed there were significant differences in the markets between Buffalo and San Diego. There was acknowledgement that the U.S.

market was experiencing difficulties as well. This suggests that DFAIT consider emphasizing the U.S. market even more than it does now.

The Montreal group noted that Europe was also a key market and that Russia and the former East block countries were worth watching. As one participant in Winnipeg stated *"exports are becoming a bigger and bigger part of my business every day and we are looking for more and more markets around the world every day. The issue is once you've learned how to do business in one country it gets easier and easier. At first there are surprises."*

Departmental Role

The Winnipeg group agreed that the industry needed vital information to facilitate their exports. However, most agreed that government should not be in the business of publishing information on this subject in this format. The majority of participants felt that this information was better supplied by the industry association or by private firms because they felt it would be more cost-effective, more current and more customized for their industry.

The Montreal group were more concerned that government was not facilitating exports. The NAFTA created additional paperwork and labelling was demanding. It was felt that smaller companies with small staff do not have the resources to deal with all the paperwork. However, there was acknowledgement that trade offices in some parts of the U.S. have been helpful (e.g., N.Y.).

Content

Both groups believed that the GMOR provided information that might be of use, but that it was **too general**. The group felt they received a lot of information from the Department such as facts and figures. Their **preference would be for more practical information** such as potential contacts. As one participant from Montreal said *"we are salespeople."*

The Winnipeg group, in particular, agreed that the **publication was very dated**. Many felt that the "market" changed very quickly (perhaps every few months). As such, many felt a publication could not possibly be kept current.

Apparel manufacturers wanted information that would facilitate better access to the markets. This included:

-
- ❖ lists of industry, retailer and government contacts;
 - ❖ list of brokers/freight forwarders;
 - ❖ duty and tariff information; and,
 - ❖ the terms and conditions of the domestic country.

Some participants felt statistics were important, but they had to be detailed and current.

The Montreal group felt that useful sections included the size comparison chart, contacts, trade magazines (mention the publisher so they could follow up) and trade shows.

More information was requested on the following:

- ❖ profiles on Germany, Belgium, parts of Africa (Ivory Coast, Senegal) and the Middle East (Jordan, UAE);
- ❖ the retail base and how they buy;
- ❖ names, addresses and a way of reaching representatives or sales agents;
- ❖ cultural information;
- ❖ credit terms;
- ❖ business culture;
- ❖ the rules of the land;
- ❖ more information on duties and tariffs; and,
- ❖ sales taxes in the domestic country.

The group recommended having a separate section for the U.S. to discuss issues such as labelling.

Participants felt that a couple of perceived erroneous statements may reduce the GMOR's credibility. Some examples cited were that the capital city of Nigeria is not Abidjan and that

in the Atlanta section the information under the Knowledge of Fashion Trends was not considered to be true.

Other sources of information included a Sales Book (available in the U.S. for \$100) which was seen as being very useful to the trade.

Editorial Considerations

There were few comments on stylistic or language considerations. However, it was generally agreed that it could use page numbers, a proper table of contents and tabs to facilitate its use. More information is available on editorial considerations under separate cover.

Design Considerations

Participants liked the format because of its portability. Type-size and fonts were thought to be adequate. The cover is fine, but the depiction of the children seemed an afterthought. More information is available on design considerations under separate cover.

Marketing and Promotion

The Winnipeg group felt that the government could send a memo out to each manufacturer that can give them the names of CCM or other publications that can give them more accurate, more timely information. It was felt that this would limit government spending. The Montreal group felt that this GMOR might supplement this publication which was geared at the U.S. market. It cost approximately \$100 U.S.

Participants felt that recommended changes had to be made to the publication in order for it to be saleable. They suggested a price of around \$10. There appeared to be some reluctance to pay. As one person said, "*it should be free ... it is our government.*"

Participants did not endorse advertising or sponsorship. They felt it was important to distinguish this from other directories.

Publishing Options

There appeared to be some acknowledgement that smaller, less sophisticated firms would be better served by this publication than the older, more established firms.

The Montreal group differed from the Winnipeg group in terms of their acceptability of electronic information. Montreal preferred hard copy but they acknowledged that they need information quickly.

The Winnipeg group felt that the main role for the Department was in the collecting of information from abroad and providing it in such a way that limited costs. There was general agreement that a real need could be filled by creating a database that would be updated frequently with new information. The group acknowledged that the information would have to be provided in a flexible manner to suit the variety of companies in the industry. They suggested on-line, faxes and personal phone calls as the preferred distribution vehicles.

3.3 Fish and Seafood

The findings in this section are based on the results of two focus groups.

Three publications were evaluated by participants: the *Global Market Opportunities Review – Fish and Seafood; Hong Kong – Guidelines for Canadian Fish Exporters, 1993–1994* (evaluated in Vancouver); *United Kingdom – Guidelines for Canadian Fish Exporters, 1993–1994* (evaluated in Halifax); and, the *Canadian Fish and Seafood Exporters Sourcing Guide*.

Purpose of the publication

To provide an overview of current market opportunities and to move towards the articulation of export marketing strategies to help expand the scope and reach of Canadian business into international markets.

Overall Impressions

Both groups were similar in believing that the Fish and Seafood GMOR had very little relevance for them as fish and seafood exporters simply because it was much too general for them. As one person noted, "*it's almost generic.*" For experienced exporters, it was an easy target for them to take shots at because it had very little information of use to them. Consequently, both groups questioned the publication's value, its production costs, whether it should be published at all and, if so, whether government was the appropriate publisher.

Participants preferred the information in the *United Kingdom – Guidelines for Canadian Fish Exporters (1993–1994)* (The *Hong Kong – Guidelines* was presented to the Vancouver group). They liked the Guides because:

- ❖ they contained demographics of the buyers and what they are buying; and,
- ❖ they are country-specific instead of taking a global view.

This information provided them with some of the tools required to build a strategy. However, both groups were concerned that the lists in the publications may not be accurate or comprehensive.

The *Canadian Fish and Seafood Exporters Guide* elicited very little reaction, but was generally viewed as being a useful publication.

Export Snapshot

All participants acknowledged that exports were fundamentally important to the industry. Anywhere from 60 to 80% of the catch is exported. With few exceptions, participants treated the U.S. market like a domestic market. One participant summed up the industry as "*it's exponential every day.*" This suggests that future GMORs may want to provide more detailed information on the U.S. market.

The Vancouver group, in particular, noted that European countries had been a strong traditional market. However, this market has been substantially eroded by the Norwegians who have introduced lower cost, fresh fish to European customers. In addition, they can bring their product to market more frequently and sell in smaller quantities. They felt that trade with Japan had risen substantially.

Departmental Role

Participants acknowledged using the trade missions of Foreign Affairs. While the Vancouver group thought the trade commissioners were excellent, the Halifax group had mixed feelings: some have had success and some have not. This group also thought that tariff information from Foreign Affairs was not current. This suggests that Mission information be kept current and that it contain actionable marketing directions.

Content

Participants felt that, although the GMOR provided an overview of the Canadian industry, it had a **dearth of actionable market-oriented information** that exporters could put to use either in a strategy or for tactical advantage. This attitude was summed up by one participant who said "*where's the market in that book?*"

As a result of the aforementioned, many participants questioned who was the target of the GMOR. Some felt it might be adequate as an overview of the Canadian fishing industry for students in grade 7 or 8.

Much of the **content of the GMOR** was challenged. Many of these centred on what participants in the Vancouver group felt were major differences in the industry between the west and east coast fisheries. These distinctions were not noted in the Fish and Seafood GMOR.

The *Canadian Fish and Seafood Exporters Sourcing Guide* was perceived to be a better publication because participants had **used the information** it contains. Some participants used it for **referrals**. There was some question of how accurate the information was because it would depict suppliers providing a certain species even though they may not currently be in the business of supplying that particular product.

The United Kingdom – Guidelines for Canadian Fish Exporters (1993) was **used by many participants**. Some had received the information by fax unrelated to the focus group testing. It was perceived as being a very useful publication because of its **market-driven information**. Some participants questioned its datedness, while others would like to see more trend information.

The participants often mentioned how they were looking for **hard information** on which they could act. They particularly prized detailed information such as **contact lists, trends and current and future consumption patterns**. However, the Vancouver group were concerned that out-of-date lists were still being handed out at trade shows.

Another person noted that these publications may best be **targeted at someone starting out new in the business**. He said "*if I was a large company, I better already know these customers.*"

Although the following market-related information was obtained from the *Lobster GMOR* participants, the Fish and Seafood participants would also be looking for information such as:

- ❖ lists of importers broken down by species handled;
- ❖ lists of chain stores, large restaurants, distributors;
- ❖ trends in the industry;
- ❖ tariffs;
- ❖ competitive import statistics by species;

-
- ❖ consumption rates in the foreign country;
 - ❖ restrictions on entry;
 - ❖ costs of freight information;
 - ❖ names of air shippers;
 - ❖ information on the various types of internal transportation systems;
 - ❖ local customs, cultural and customer preferences; and,
 - ❖ seasonal consumption.

Editorial Considerations

A few participants believed the text should use more layman's terms to enhance its readability.

Participants noted inconsistencies in the text. For example on page 1 the Review states "Canada still has abundant marine resources to meet many demands of the international market," while on page 2 it is noted that "the Canadian fishing industry is currently in a transition period due to unstable economic conditions brought about by supply shortages."

Design Considerations

There were no participant observations regarding design considerations. Larry Johnson Communications Inc. has provided information on this subject under separate cover.

Marketing and Promotion

Participants said they liked a now defunct publication of Fisheries and Oceans called the Fishes of Canada. It was considered to be an "excellent" publication containing good pictures of each fish species, its size, portion cuts and the name of the species in the foreign country. This suggests that the Department consider examining the strengths of other publications such as the former Fisheries and Oceans.

When participants were asked about an advertiser or a sponsor, it acted as a catalyst for concerns over the publication's cost. The group was divided as to whether government should proceed with the publication (with suggested improvements) or whether it would be better if industry published it. The Department may wish to examine this further with industry and the associations.

Publishing Options

The Halifax group noted that there were many fish and seafood publications that duplicated the ones published by CAFE. There was some call for rationalizing them, perhaps by working more closely with industry and associations.

The Halifax participants were lukewarm to the suggestion of alternative publishing formats. They felt that smaller companies may not have access to higher technology. Many participants in the Vancouver group were open to the suggestion of alternative publishing options such as an electronic bulletin board, on-line access or faxes. Participants were more concerned about "if" the information is relevant rather than "how" it can be accessed.

Vancouver participants were very concerned about the presumed costs of production of the publication. They believed that electronic access could reduce costs and provide more timely information.

Most participants in both groups did not endorse sponsorship or advertising.

3.4 Lobster

The findings in this section are based on the results of focus group research.

Purpose of the publication

The purpose of this publication is to offer an assessment of the Canadian lobster industry, to examine its strengths and suggest a course of action for governments to facilitate industry in order to develop a coordinated export marketing strategy for the benefit of all of the stakeholders.

Overall Impressions

Most participants felt that the publication was a good start to a marketing plan. However, they also agreed that anyone who was in the business for any length of time did not require such a plan. Most agreed that it would benefit novices in the industry.

About one-half of the group had seen similar information before. One person noted that he had *"used it in a limited way. This is one of the mix, but not a critical tool."* Another noted that *"if we required this book to be successful, we'd all be in trouble."*

Participants liked the idea of seeing "Canadian" lobster marketed as a Canadian product.

Export snapshot

Participants said that exports are fundamental to the business. They felt the U.S. market is most important for their industry and they believe that demand is picking up there. However, they do not concentrate on just one market, they go where the market is. This suggests that future GMORs may want to provide enhanced detail on the potential in the U.S., but not to the exclusion of other potential markets.

Participants felt the moratorium had reduced the availability of many fish species. As a result, many people were now reconsidering their options given their current capacity. Much of that interest has turned to other viable sources such as lobster and / or the lobster air freight trade. It was agreed that this had put a lot of pressure on the lobster species.

Departmental Role

Participants felt it was important to promote "Canadian" lobster. Specifically, they would like to see Foreign Affairs put pressure on the Americans to ensure the Canadian product is identified as such.

Participants recommended that people interested in exporting to a country should phone the trade consulate instead of looking information up in this publication. This suggests that Trade Consulate, Embassy and Mission listing be provided in the GMOR.

Content

All participants could cite **erroneous information** in the publication. This impacted on their perception of the credibility of the information. There was an expectation that the information should be correct and updated frequently.

For example, participants thought that the section on Boston was very thorough, but there was very little information on New York. And one participant thought the existing information on New York was wrong. In his words *"the GMOR has dramatically underestimated the flow of product through there."*

Many participants felt that the **lists were inaccurate**. One person noted *"there are major companies doing business in lobster that are not in here. And there are companies listed who are no longer in the trade."* In another example, one participant noted that, Milton Block, an importer on page 5 of section B, was said to have been dead for several years.

Participants were concerned that the **lists were not comprehensive**. As one participant said *"there are at least five names I deal with in Europe that are not on this list.* However, there were other participants who resented that the publication listed many of the customers that they had spent considerable time and effort building a relationship. It was now published on a *"silver platter"* for anyone to use. As such, there was a vested interest in not having their customers identified.

Many participants liked the executive summary and the section called Canadian Lobster in a Global Context. It was felt that it could be used to help convince potential customers of the relative importance of Canadian lobster on the world export market.

Participants recommended that either the lists be accurate and up to date or that Foreign Affairs should simply publish the address and phone numbers of the trade consulate or embassy.

There was unanimous agreement that publishing prices in various markets was risky. It was felt that the price of lobster fluctuated so much due to so many factors that the published price was quickly irrelevant and dated. Everyone agreed that it should be taken out. However, if a price was to be published, participants felt that it was important to depict how they arrived at it e.g., spot market, entry level, retail, distributor, etc. Without this caveat, participants felt it created false expectations.

A few participants felt that different companies had different roles to play. They felt that this publication may deceive some companies into believing that they are able to service markets like Vancouver or Rome. They may not be able to because they lack basic infrastructure support such as access to convenient transportation.

Participants used a number of ways to get information. These included referrals, banks that provide general trade information, fish associations, import associations, chambers of commerce, local governments, embassies or simply cold calling. One person noted that *"there are a thousand ways to get information. It isn't in a recipe provided in this document."* This suggests that the GMOR may be improved by detailing other information sources.

The following information should be added to or enhanced in the publication:

- ❖ comparative figures (growth in domestic consumption vs. growth in domestic supply);
- ❖ consumption rates in the foreign country;
- ❖ restrictions on entry;
- ❖ costs of freight information;
- ❖ names of air shippers;
- ❖ generic description of the market, divided by regions, cities, the number of people;

-
- ❖ information on the various types of internal transportation infrastructure;
 - ❖ what product is in main usage, how is it packaged;
 - ❖ local customs, cultural and customer preferences;
 - ❖ seasonal consumption;
 - ❖ how are peak seasons serviced; and,
 - ❖ trade show listings.

Editorial Considerations

There were few comments on the readability of the publication. Each market profile appeared to be written by a different author. As such, the information differed in terms of its consistency and depth of content. Participants would like more in-depth information and consistency between sections.

Design considerations

There were no participant observations regarding design considerations. Larry Johnson Communications Inc. has provided information on this subject under separate cover.

Marketing and Promotion

Participants were lukewarm to the concept of advertising or sponsorship. It was felt that the advertising may take away from the true focus of government to promote the lobster industry. There could be some question as to the true objective of the publication if there was advertising. One person noted "*is it driven to helping the industry or to help defray its costs?*"

Participants were willing to pay a nominal fee. If it was known that the information was current and the lists updated, then as one person said "*we couldn't afford not to.*"

Publishing Options

There was no interest in getting this information on CD-ROM or on diskette. It was felt a publication would be easier to use.

3.5 Packaging and Labelling Equipment

The findings in this section are based on the results of focus group and interview research.

Purpose of the publication

The purpose of the publication is to provide Canadian manufacturers of packaging and labelling equipment with a timely overview of global market opportunities for their sector.

Overall Impressions

Participants generally found the *Packaging and Labelling Equipment*⁴ to be a valuable publication that the industry could use. Many participants felt that experienced exporters would find this publication less useful than novices. For novices, it was felt that it would be a good starting point.

No participant had seen this publication before this evaluation and many wondered why that had been the case. One person summed the Department up by saying "*they do a terrific job in certain areas, but in the dissemination of information they are a little weak.*"

Export Snapshot

With the exception of one participant, the group believed that exports were fundamental to the growth of their industry. The Canadian market was seen to be static. Growth would have to come through exports. As one person said "*it was the only way to survive.*"

Participants agreed that a slightly lower dollar helps exports especially given that the American dollar is the currency of choice in international trade. Since exports are almost invariably in American dollars, a lower Canadian dollar was good for the industry. It provided some flexibility in pricing or added to the bottom line. However, the group cautioned that the Canadian dollar's reputation was important and that a much lower one may find that the international community views it as a peso.

⁴ The Packaging and Labelling Sector was developed as an export strategy and not as a GMOR.

The U.S. was seen as the most important market due primarily to its size. As one person said *"the U.S. is the first choice, but anywhere else is game."* Participants generally agreed that there was good potential for exports in the emerging markets of Mexico, South America and South-east Asia. It was also felt that these markets had not been pre-conditioned to the reputation of German and Italian companies. Canada's comparative advantage appeared to be a competitive price. This suggests that more detail should be provided on the U.S. market and the emerging markets in Mexico, South America and South-East Asia.

Departmental Role

Participants noted that trade shows and exhibitions were important mediums for this industry to solicit customers as well as maintain a profile in the industry. The Chicago trade show was seen as the most important. It was acknowledged that the Department sponsored trade shows, but some participants noted that they were not getting enough notice. They asked for about a two month lead time.

One person noted that the NAFTA had increased paperwork. He recommended that the paper work be reduced. In addition, it was noted that cross-border shipping has slowed down.

Content

Participants felt that the **information in the country profile section was inconsistent from profile to profile.** The United Kingdom was considered weak, while the Ireland profile was the best. One person also wondered why Germany and Italy, acknowledged leaders in the business, would have a profile when there was almost no chance that exports would go there.

Participants felt that **many South American and south-east Asian countries as well as Australia were missing from the country profile.** In addition, they felt it important that more detailed information be provided on the NAFTA partners and on other developing countries. One person wanted just *"six pages of names."*

The following information was of particular interest to the group:

- ❖ market size (but show how the figures were determined);
- ❖ foreign contacts broken down by product line (include distributors, competitors, industry association);

-
- ❖ government contacts (perhaps in a glossary);
 - ❖ culture-related information;
 - ❖ more financial data on foreign markets (volume, market size);
 - ❖ information on VAT;
 - ❖ international competitors; and,
 - ❖ foreign technical specifications (e.g., voltage, video standards).

Participants also felt that the information in the current publication was very dated. They recommended that it be updated on an annual or semi-annual basis.

Other sources of information included packaging directories from countries where trade shows were attended, a publication called Packaging Digest and trade magazines.

Editorial Considerations

Participants noted that the publication seemed written with a tight deadline in mind. The phrase "this information is currently unavailable" was seen throughout it. This was thought to have been taken to a ridiculous extreme where, under the language requirements sub-heading in the U.K., the statement "this information is currently unavailable" appeared.

Design considerations

There were no participant observations regarding design considerations. Larry Johnson Communications Inc. has provided information on this subject under separate cover.

Marketing and Promotion

Although there was no major objection to the thought of having an advertising or a sponsor, participants were not in favour of it. Some felt it would dilute the impression of a government document or that it might be confusing or contradictory. As one person said, "*this is serious, not commercial.*"

Many participants endorsed video as a great tool for their industry. By having clients see equipment running, it added to the credibility of the organization. Participants felt that CD-ROM is now where video was only a few years ago. More and more people have the capability. It was felt that the more sophisticated the presentation, the more one's product is considered to be leading edge.

Publishing Options

Participants felt that the publication could easily be segmented into the different continents and offered to the industry separately. They also recommended that the information be offered on-line to supplement, but not substitute, the hard copy.

As opposed to some of the other publications tested in this evaluation, participants were not visibly concerned with the presumed cost it.

3.6 Pork

The findings in this section are based on the results of a teleconference.

Purpose of the publication

The purpose of the global market opportunities for pork is to provide information which may assist Canadian industry in developing strategies for the export of pork to major pork importing countries.⁵

Overall Impressions

There was consensus among the participants that the publication was "quite good, informative and concise." However, it was also agreed that if one was already involved in the market, one had better, more advanced information than can be provided in this publication. Most, if not all participants were aware of the publication because they had a hand in its development through Canada Pork International.

Export snapshot

There was unanimous consensus that exports were very important for the survival of their businesses. Approximately 30% of the produce goes for export. Canada's competitive advantage was seen as its good image, its high quality and a 37% exchange rate advantage with the U.S. dollar. However, participants felt it was becoming increasingly important to provide the value-added to the product e.g., processed pork, boneless, etc.

Major markets were seen as the U.S., Japan, Mexico, Russia, Poland and Australia (in rough descending order of importance). Markets were not chosen for export opportunity in a strategic sense. Instead, participants would export wherever a sale could be made. Participants did not identify a need for information by geographic market, but the rank order of countries they exported to the most (mentioned earlier) might suggest to DFAIT that a detailed profile on these countries might be useful in increasing exports.

⁵ Most participants were also aware that their association had asked the Department to produce an updated GMOR for the pork sector to be completed later in 1994.

Departmental Role

Participants endorsed the suggestion that the prime role of government should be to provide better access to the U.S. market. They suggested tackling the non-tariff barriers.

Participants believed the price point was important. Even a 1 or 1.5 cent per pound difference was significant.

The participants suggested that Canada needed to be more flexible in how meat is prepared for export to other countries. Participants thought exports could be enhanced by harmonizing inspections with the standards of other countries.

Participants warned that Government should be careful about subsidies that impact on supply and demand. Government should consult with the industry before proceeding with subsidies.

Content

Participants felt that the information in the GMOR was quite good, **informative and in a concise package**. They felt that the **1992 statistics were current enough**. But it was noted that this publication could not hope to provide all of the information required. **The pork markets changed daily.**

As a result, they believed the publication would be more **useful for obtaining basic information on potential markets** that the exporter was considering but had not as yet entered.

Participants felt that the **list of importers in the publication was incomplete** and, therefore, misleading. They felt it best if it was dropped. They also felt that **publishing the appropriate import association, the trade office and consulate would be more helpful.**

Participants agreed that the following information would be important to include:

- ❖ importing classifications and regulations;
- ❖ consumption habits of the domestic market;
- ❖ retail prices/retail philosophy of the domestic market;

-
- ❖ more specific market trend information e.g., what times of year/what holidays would generate more demand;
 - ❖ information on international competitors;
 - ❖ more specific information on country's policies e.g., more information on the certificates required for importing;
 - ❖ banking structure and arrangements with Canadian counterparts; and,
 - ❖ terms of credit and business expectations.

Other sources of information included The Livestock and Meat Trade Report (Blue Book), the Yellow sheets and USDA sheets.

Editorial Considerations

The language of the publication was felt to be acceptable, clear and easy to read. However, the executive summary was not really considered to be an executive summary. More information is provided under separate cover.

Design considerations

Some participants felt that the logo designed by CPI should be on the front cover in lieu of the Maple Leaf. However, there did not appear to be an overwhelming consensus for that suggestion.

Participants had the following comments:

- ❖ that the publication looked like government;
- ❖ that the cover should show the logo designed by CPI;
- ❖ that the information appeared in a logical sequence;
- ❖ the charts were thought to be fine; and,
- ❖ there was no real concern about its environmental friendliness aspects; its assumed.

Marketing and Promotion

There was no consensus for a proposed price for the publication. Although some participants would pay a nominal fee (e.g., \$10), many others felt that this should be a free government publication.

Some participants felt it would take away from the feeling that this was a government publication. In any event, one participant noted that *"any advertiser would not get their money's worth because they don't read this stuff every day."*

Publishing options

Participants attitudes towards publishing options are captured by one person who said *"alternatives should be available in a paperless society. This means one should be able to publish this more often. If the format does not change, then (one) can just update the statistics."*

4.0

CONCLUSION AND RECOMMENDATIONS

Most participants were more interested in the content of the GMOR and less concerned about how it is presented. The "ideal" GMOR may not actually exist in hard copy form, but for many participants would exist in a database that they may access on-line at the time of their choosing. However, there are significant portions of the target group that would still like to deal in hard copy.

The Department should consider:

1. establishing a GMOR database accessible on-line; and,
2. ensure the information may be accessed by phone, fax or hard copy.

Many participants were unaware of a GMOR (until its evaluation when they were asked to participate in the research).

The Department should consider:

3. increasing its efforts to ensure that existing and potential exporters are made aware of the GMORs and other information from the Department.

Participants valued information such as market intelligence (e.g., contacts, leads, etc.), market demographics (market size, culture, etc.) and transactional information (credit terms, foreign banking) much more than other types of information. However, these tend to have a relatively short shelf life. Accurate and timely dissemination were important.

The Department should consider:

4. making the collection of this type of information a high priority;
5. ensuring the information is accurate; and,
6. ensuring as quick a turn-around time as possible.

Most participants valued the role of the Department in facilitating their exports. Some had used the services of the Department to attend trade fairs and missions. They recognized and appreciated the efforts of the trade consulates. However, there was a significant portion of the target group that was unaware of what the Department could offer them. Many participants recommended that the Department work more closely with the associations.

The Department should consider:

7. examining more cooperative ventures with the associations.

Participants generally considered the U.S. market to be the most important. Many believed that there were emerging markets in Mexico, Latin America, South America and the Pacific rim. However, participants said they would export wherever there was an opportunity to make a sale.

The Department should consider:

8. emphasizing the Mexican, Latin American, South American and Pacific rim countries in the GMORs;
9. increasing the role and distribution of the Country Guides; and
10. that in terms of strategic approach, exporters are seeking opportunities in any country.

Many participants believed that the GMORs were laborious to read from cover to cover. Most tend to "hunt and peck" their way through the publication.

The Department should consider:

11. giving future editions a good edit to enhance their readability.

Most participants had very few comments about the design of the GMOR. However, based on the experience of the researcher in other government publications, the following is offered:

The Department should consider:

12. having the GMORs published (in whatever form) with a consistent look;
13. ensuring that each GMOR has the Canada Wordmark and Departmental signature;

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14. having a type size and font such as Times Roman or Dutch 12 or 14 point;
 15. having consistent page numbers;
 16. ensuring that sections, headings and sub-headings are clearly distinguishable;
 17. ensuring that tables have horizontal and vertical rules for ease of reading; and,
 18. periodically having charts and graphs to liven the text.

Few participants endorsed the suggestion of having advertising or sponsorship. They believed it might take away from the focus of the publication. However, if the information was perceived to provide a great deal of value added, it would not pose a problem. As stands now, most participants would pay a nominal fee just to make sure they covered the base with this information.

The Department should consider:

19. having advertising or sponsorship if the information in the GMOR had a high value added information; and,
20. charging a nominal fee for the publication consistent with the perceived value of the information.

ANNEX A
RESEARCH LOGISTICS

Cities ⇒	Halifax	Montreal	Toronto	Winnipeg	Vancouver
↓ Sector					
Aircraft repair / overhaul		3 interviews		3 interviews	March 30 F-group
Apparel		March 16 F-group		March 29 F-group	
Fish and seafood	March 25 F-group				March 30 F-group
Lobster	March 25 F-group				
Packaging and labelling equipment		3 interviews	April 6 F-group		3 interviews
Pork	12 cross Canada in-person and telephone interviews/teleconference				

ANNEX B
SCREENING CRITERIA

Target group: the person in these companies who is in charge of export sales.

1. For smaller companies this could mean the owner or manager.
2. For larger companies, this could mean the Director of Marketing, Director of International Sales, Director of Research, etc.

Quota: 9 participants for 6 to show.

Size of Company: Achieve a good mix of size of companies.

Introduction:

Hello my name is _____ of "Name of Company." We have been asked by the Department of Foreign Affairs and International Trade (formerly External Affairs) to organize a group of people to discuss the publication called " _____ " We are looking for the person in your company in charge of export sales.

(IF NOT THIS PERSON) ... Repeat introduction.

We are interested in getting your views on this publication. The group discussion will last for less than 2 hours. **Please be assured that the discussion will be totally confidential.** But we need to ask you a few questions to see if you qualify for the groups.

1. Are you familiar with this publication?

Yes (CONTINUE)

No (RECRUIT)

2. Did you actively aid in its development?

Yes (WATCH QUOTAS - no more than 3 per group)

No (RECRUIT)



Thank you for this information. We would like to invite you to participate in this group discussion. Light refreshments will be made available before and during the group.

You will receive an honorarium of \$100. Would you be interested in attending?

- Yes (CONTINUE)
- No (DISCONTINUE)

If you have a pen handy, I will give you the location, date and time of the meeting:

Location:

Date:

Time: ? :00 PM:

In order to prepare for these groups, I would like to send you a copy of the "name of publication" so that you can review it in detail prior to the groups.

We would like you to highlight any area that you find useful and not so useful. Mark it up as much as you would like. Please make sure you bring it to the group.

Can you give me your full name, address and telephone number please?

NAME _____

ADDRESS _____

POSTAL CODE _____

PHONE # _____

Please come fifteen minutes early so you can settle in and we can start right on time.

Thank you again. We will be calling you before the group to verify that you can still attend. In the meantime, if anything comes up and you cannot attend, we would appreciate it if you would call our office and let us know. Please call XXX. THANK YOU.

ANNEX C
MODERATOR/INTERVIEW GUIDE

DEPARTMENT OF FOREIGN AFFAIRS
AND
INTERNATIONAL TRADE

GMOR Series

Moderator/Interview Guide

v1.2

March 14, 1994

A.

INTRODUCTION

1. Welcome participants.
2. Background: the Department of Foreign Affairs and International Trade has a 3-step approach to the collection and dissemination of trade development information.
 - In Step 1, the Department provides information on Canadian exporters for foreign buyers and for its trade commissioners;
 - In Step 2, the Department provides information on foreign markets for Canadian exporters; and,
 - In Step 3, the Department provides information on government-wide initiatives for Canadian exporters.
3. Today we are discussing an example of Step 2 the Global Market Opportunities Review (Aircraft or Apparel or Fish or Packaging and labelling Equipment or Fish and Seafood or Lobster). This publication provides information on foreign markets for Canadian exporters of "name of topic above."
4. The purpose of this discussion is to get your comments on ways the "Review" can be improved to better meet your needs. My job is to write an objective report based on what you say.
5. These groups are confidential.
6. Note the two-way mirror, my clients are behind it. They want to get first-hand feedback before my report is finished; but they don't want to interfere with the groups.
7. Please note that the session is being audio-taped. This is a time-saver that allows me to review the session and make notes afterwards. However, my clients may want to listen to the tapes as well.
8. Review discussion group ground rules: open and honest discussion, no right or wrong answers, hear all views, etc.
9. Discussion will last no more than 2 hours; feel free to excuse yourself.
10. Have participants do a round-table introduction.

B.

GENERAL INDUSTRY DISCUSSION

1. Before we get into the specifics of the "Review," tell me how important exports are for the health of this industry? (e.g., compared with domestic markets or other industries in your area).
2. Who are your most important markets? Is that expected to continue? Do you anticipate future growth? (Probe: in what areas, how much, etc.)
3. In order to export your product, what information do you need to know? (prioritize)
4. What information would help you to export more?

C.

DEPARTMENTAL ROLE

1. What role does government play in facilitating your exports?
2. What role should government play in facilitating your exports?
3. How familiar are you with the trade and export market information provided by the Department of Foreign Affairs and International Trade?
4. Do you currently obtain information and intelligence from the Department? How useful is it?
5. What information do you think the Department could provide that would be useful for you?

D.

GMOR PUBLICATION MODULE

Let's turn to the "Review" that you examined.

1. What are your overall impressions? (Probe: useful, interesting, not useful, not interesting)
2. Were you aware of this publication before this evaluation?
3. Did you use it previously? (How did you use this information? Probe for usefulness)
4. Were there any sections you found particularly useful? (ask for details)
5. Were there any sections you would have liked more information? What would that be?
6. Is there information in the "Review" that you found extraneous or not useful?
7. Are there any particularly difficult or confusing sections? (Why is that?)
8. What specific changes do you think need to be made to the "Review" as a whole to make it more relevant for you?
9. How would you describe the language in this draft? (Probe: tone, business, bureaucratic, overall clarity of writing, easy to read, etc.) Is it appropriate?
10. Probe: cover design, colour, format, fonts, type-size, over-all layout, spacing, sequencing of information, length, tables, charts (or lack of them) and environmental considerations (on recycled paper, recyclable, etc.).
11. Section by section review: participants will flip through the "Review" to capture any specific, detailed editorial commentary.

E.

MARKETING AND PROMOTION

1. Are there other sources of information that you rely on for exports? If so, how do these compare with: the "Review;" other information of the Department?
2. This research has assumed that you are the prime targets for this publication. Do you believe this to be so? Are there other people, both inside and outside your organization, that could make use of the information? How do you reach them?
3. As you know, this publication is free. Do you think the Department could sell this publication? If so, how much do you think it could sell for?
4. What would you think if the "Review" had advertising or a sponsor? Would that change your attitudes towards the publication? (or to the Department, to the sponsor?)
5. Are there other ways of "publishing" the "Review?" (Probe: diskette, on-line, CD-ROM) How do these compare with the hard copy version?

F.

WRAP-UP

"Take a few moments among yourselves and tell me what you think were the more important conclusions or discoveries of the group. I'll be back in a moment."

1. Moderator seeks supplementary questions from DFAIT to ask participants.
2. Moderator asks participants supplementary questions from DFAIT.
3. Participants summarize the most important discoveries in the focus group.
4. (Option for client) Participants offered an opportunity to speak with the client.

COLLECT ALL MARKED "REVIEWS." End session, thank participants.

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