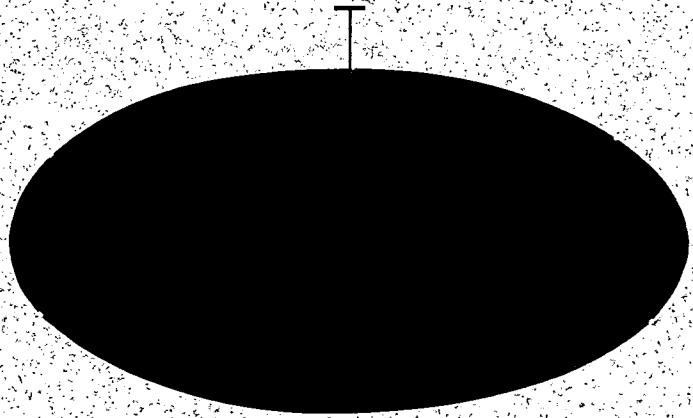
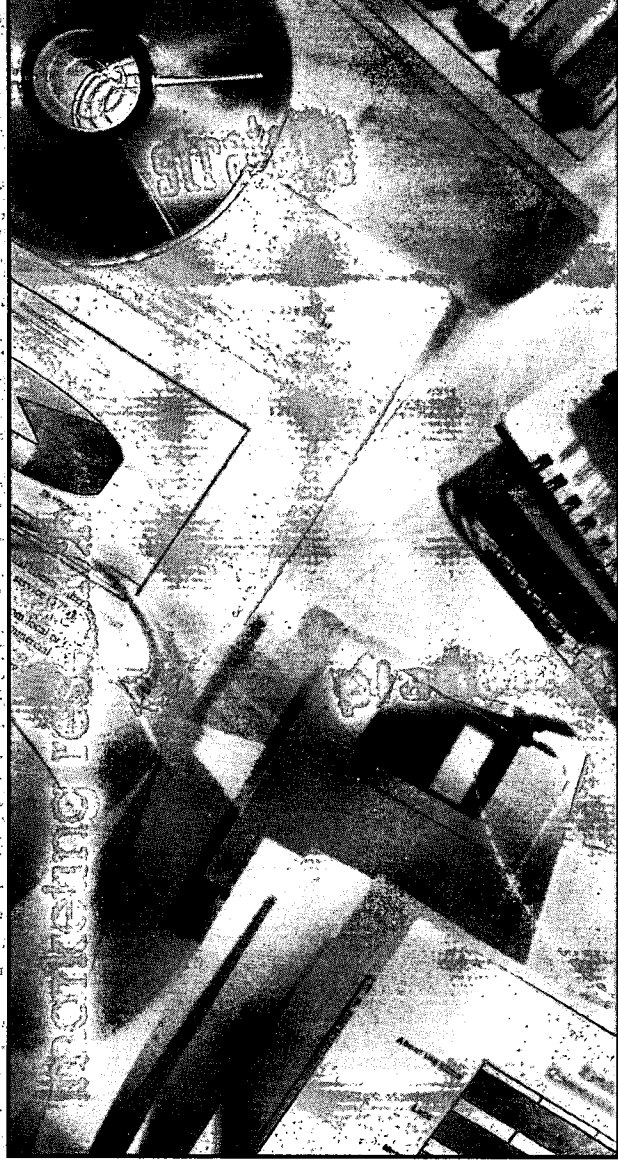


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**Survey of Export Market
Development Publication Recipients
Final Report**

May, 1995

Prepared for: Foreign Affairs and International Trade Canada

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Table of Contents

Executive Summary.....	i
1.0 Introduction	1
2.0 Profile of Respondents	4
3.0 Publication Usage.....	9
4.0 Content, Format and Delivery Media.....	21
5.0 Utility and Impact.....	31
6.0 Willingness to Pay	42
7.0 InfoCentre and FaxLink Service Delivery	44
8.0 Conclusions and Recommendations... ..	47

Appendix A - Survey Questionnaire

Appendix B - Statistical Tables

Executive Summary

Background

In support of its mandate to help strengthen Canada's position as an exporting nation, the Department of Foreign Affairs and International Trade produces and distributes publications to businesses involved in or considering export activities. These publications (more than 2,000 titles) are distributed by mail and through an interactive facsimile service known as FaxLink. To assess the effectiveness of 12 of these publications, the Department commissioned a survey of intended recipients.

The specific objectives of the research were to:

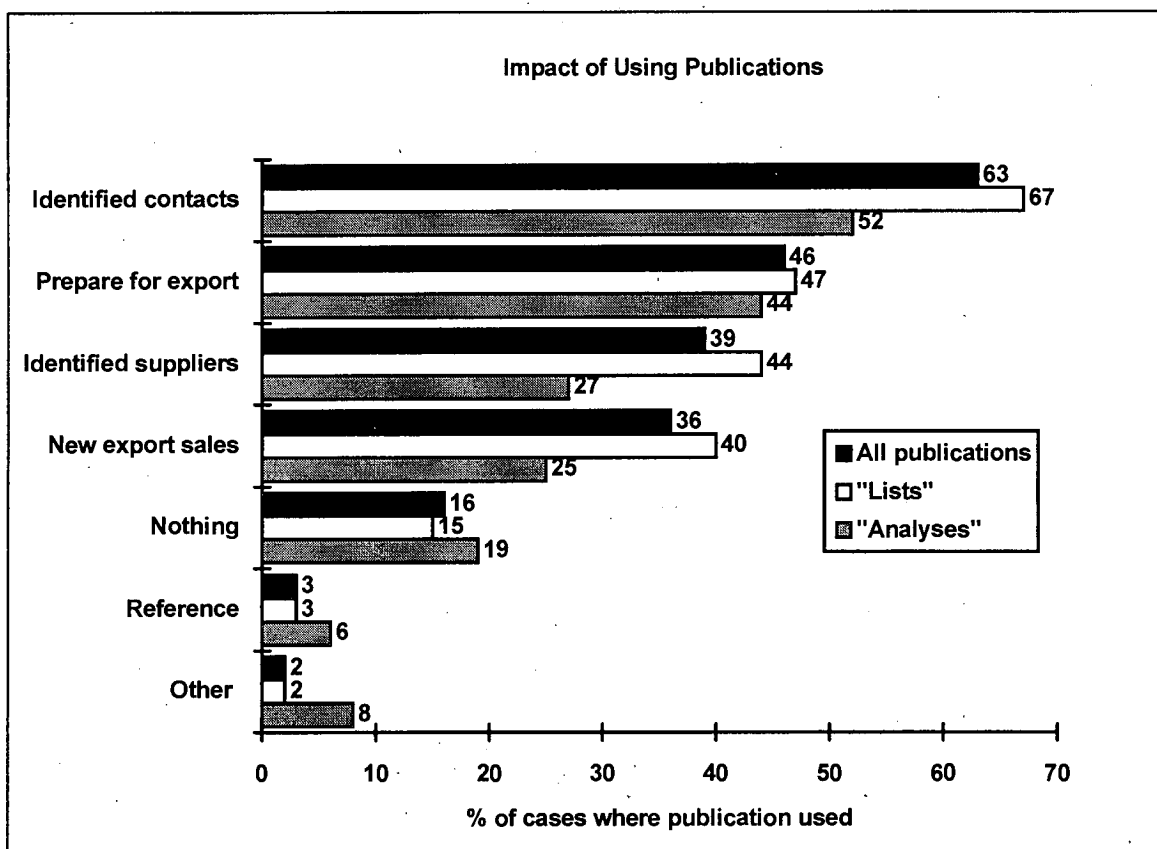
- evaluate the effectiveness of distribution and service delivery;
- determine the impact of the documents on users' export activities;
- describe readership behaviour and use of the documents;
- determine the extent to which the publications meet the needs of recipients;
- assess recipients' willingness to pay for the documents.

The study, which consisted of a telephone survey of 765 intended recipients, was conducted during March, 1995. The scope of the research was limited to non-governmental users of publications.

Overall Impact and Utility

Departmental publications have a significant impact on the activities of those current and potential exporters that use them. **In 36% of instances where departmental publications were used, respondents said they generated new export sales as a direct result.** This figure increases to 40% for publications focusing on contact lists. Furthermore, Departmental publications appear to be contributing to new export activity. Based on the responses from those companies with no export sales in the previous year, use of Departmental publications generated new export sales 10% of the time. In addition, use of the publications caused non-exporting firms to undertake new activities or prepare for export in 22% of the cases. As shown in the graph on the following page, respondents also indicated that the publications were highly successful in helping them identify contacts for export market development, undertake new activities or prepare for export, and identify suppliers of goods and services purchased by their organization.

Departmental publications were also rated highly in terms of their utility as information tools. Segmentation analysis showed that small businesses (i.e. less than 100 employees) found the documents to be more useful than larger businesses. In addition, respondents tended to rate overall utility higher for those publications that focused on providing lists or directories than those publications which focused on background information and market analysis.



Reception and Usage of Publications

Despite their high degree of impact, those Departmental publications reviewed in the study have low overall recall (55%) and usage rates (32%). While low levels of recall can in part be explained by the time elapsed between distribution and the survey, the research suggests that distribution could be more focused on small businesses with some previous export activity. Distribution might also be more targeted *within* end-user organizations, as many respondents who did not use publications circulated them to others within their organization.

Uses of Departmental Publications

End-users of Departmental publications tend to use them for a variety of purposes. Most often, respondents used the publications for contact lists, as reference tools, for research, and to support decisions about export market development.

Content and Format

Departmental publications are well-received with respect to content and format. Overall, respondents rated format elements higher than the information contents of the publications. Publications which provide potential sales leads and distributor contacts were rated as more "essential" to respondents than publications which provide analyses or background information on export markets.

Delivery Media

Respondents indicated a preference for more than one delivery vehicle, suggesting both hard copy and electronic media are required to meet user preferences. Those who indicated a preference for electronic formats preferred diskettes, Internet access or direct-dial BBS (in order of priority). However, some respondents who received diskette versions of Departmental publications said computer compatibility problems resulted in non-use.

Willingness to Pay

Most users of Departmental publications would be willing to pay to receive them. Overall, end-users would pay \$5 for publications in 81% of the cases. Respondents would pay \$10 for publications 70% of the time. Virtually all respondents who reported that the publications resulted in new export sales were willing to pay. On this basis, charging for Departmental publications would have little or no negative impact on the generation of export sales by Canadian firms. Charging for publications would also reduce superfluous distribution.

Service Delivery

Those respondents who contacted the InfoCentre to order publications expressed an extremely high level of satisfaction with the service they received. Of particular importance to overall satisfaction is the "helpfulness" of InfoCentre staff.

Recommendations

The following recommendations are based on the findings of the research:

- Focus product development activities on the needs of small business and on providing information such as potential buyers, distributor contacts, and partnership opportunities that businesses can use directly to generate sales.

- Price publications to reduce superfluous distribution. Most survey respondents did not recall receiving the documents they were sent. However, the vast majority who used the documents would be willing to pay for them.
- Actively promote the benefits of using export market development publications.
- Implement a strategy utilizing communication, promotion and incentives to encourage users to migrate to electronic products.

1.0 Introduction

1.1 Background

To strengthen Canada's position as an exporting nation, the Department of Foreign Affairs and International Trade distributes publications to exporters, academics, researchers and other clients. Of the more than 2,000 titles produced, publications include country fact sheets, export sourcing directories, market opportunity reviews, industry sector profiles and guidelines for exporting. A major dissemination point is the Department's InfoCentre, which distributes publications by mail and through an interactive facsimile service called FaxLink. The InfoCentre is also in the process of developing an electronic bulletin board service for information dissemination.

To assess the effectiveness of the documents and the services provided by the InfoCentre in meeting client needs, the Department commissioned a survey of clients who have received select departmental publications (either through the InfoCentre or via direct distribution).

1.2 Objectives

The specific objectives of the research were to:

- evaluate the effectiveness of distribution and service delivery;
- determine the impact of the documents on users' export activities;
- describe readership behaviour and use of the documents;
- determine the extent to which the publications meet the needs of recipients;
- evaluate clients' perceptions of InfoCentre service; and
- assess recipients' willingness to pay for the documents.

1.3 Approach

The approach involved a telephone survey of 765 recipients of 12 publications in March, 1995 (see Appendix A for questionnaire).

The sample was drawn from distribution lists provided by the Department. Survey respondents were asked whether they recalled receiving publications that had been disseminated to them. Respondents were further screened by asking them whether they used the publication(s) they received. Reasons for non-use and identifying characteristics were obtained from those who did not use the publication, while those who used the publications provided information on format, content and service delivery. A breakdown of the sample by publication is provided in Table 1, *opposite page 2*.

Table 1
Sampling

	Agreed to Participate		Recall Publication		Use Publication	
	n	%	n	%	n	%
1. Canadian Fish and Seafood Exporters Sourcing Guide - hardcopy	158	100%	118	75%	79	50%
2. Canadian Fish and Seafood Exporters Sourcing Guide - diskette **	181	100%	104	58%	54	30%
3. World Directory of Seafood Importers - hardcopy	150	100%	93	62%	66	44%
4. World Directory of Seafood Importers - diskette **	165	100%	85	52%	46	28%
5. Guidelines for Canadian Fish Exporters - USA	116	100%	73	63%	46	40%
6. Guidelines for Canadian Fish Exporters - Japan	129	100%	91	71%	55	43%
7. GMOR for Apparel	307	100%	102	33%	37	12%
8. GMOR for Oilseed	85	100%	51	60%	32	38%
9. GMOR for Pork *	33	100%	20	61%	13	39%
10. GMOR for Beef *	47	100%	20	43%	15	32%
11. GMOR for Contract Furniture *	26	100%	14	54%	3	12%
12. GMOR for Medical Devices *	39	100%	25	64%	13	33%

* Small sample did not permit detailed analysis

** Lower usage rates reflect limited distribution and the time of the survey

The survey was administered using a computer-assisted telephone interviewing system (CATI)¹, which minimized response burden and permitted complex sample management (for quota sampling). Respondents were called up to five times. All respondents were given the opportunity of using the official language of their choice.

Overall, the response rate was high -- 84% of the valid sample (i.e. correct telephone number, company, etc.) agreed to participate in the study. Table 2, below, shows the response rate for each publication. The response rate for Global Market Opportunity Review - Apparel was lower than average as some respondents refused to participate because they did not recall receiving the publication.

Table 2 - Survey Response Rate

Publication	Response Rate
1. Canadian Fish and Seafood Exporters Sourcing Guide - hardcopy	89%
2. Canadian Fish and Seafood Exporters Sourcing Guide - diskette	89%
3. World Directory of Seafood Importers - hardcopy	89%
4. World Directory of Seafood Importers - diskette	89%
5. Guidelines for Canadian Fish Exporters - USA	89%
6. Guidelines for Canadian Fish Exporters - Japan	89%
7. GMOR for Apparel	75%
8. GMOR for Oilseed	92%
9. GMOR for Pork	94%
10. GMOR for Beef	90%
11. GMOR for Contract Furniture	93%
12. GMOR for Medical Devices	91%

Data from the survey were entered into a machine-readable file, coded, and analyzed using descriptive techniques. Analysis of correlation was utilized to determine the relative impact of service elements on overall satisfaction of InfoCentre clients. The reader should note that because of a low number of respondents who *used* them, those publications marked with an asterisk (*) in Table 1 were not analyzed in detail on an individual basis. However, the information collected from the respondents who used these publications was included with aggregate findings.

¹ A CATI system helps interviewers administer complex questionnaires by automatically following pre-determined skip patterns based on respondents' answers. It also allows interviewers to enter responses directly into a machine-readable file.

1.4 Scope and Limitations

Overall results from a survey of this size (n=765) are considered accurate within plus or minus 4%, 19 times out of 20 (assuming maximum variance). However, results for individual publications may be less reliable and generalizations should be made with caution. Government recipients were excluded from the sample and, therefore, are not within the scope of the study.

It should also be noted that because distribution was one of the elements considered by the study, information collection focused on *intended* respondents (i.e. those on Departmental mailing lists). When respondents recalled receiving publications but did not use them, we probed for reasons on non-use and gathered profiling information. We also asked whether these respondents circulated documents to others within their organization. We did not, however, collect data from these other potential users. As a result, the scope of the study does not include usage, behaviour and attitudes of those people who may have received Departmental publications as a result of internal distribution within end-user organizations.

1.5 Note to Readers

It should also be noted that the survey design allowed respondents who reported using more than one publication to respond to questions about content, format, utility, impact, etc. *for each publication they used* (see the survey questionnaire in Appendix A for more detail). As a result, some findings are reported using terminology such as "50% of cases" or "50% of instances". "Cases" or "instances" refer to an instance of a publication being used by a respondent. If a single respondent used three publications, this is referred to as three cases. On the other hand, if a respondent only reported on one publication, this is referred to as one case or instance. When results are reported using terminology "% of respondents", we are referring to the individuals who responded to a survey question, regardless of whether they reported on one or more publication.

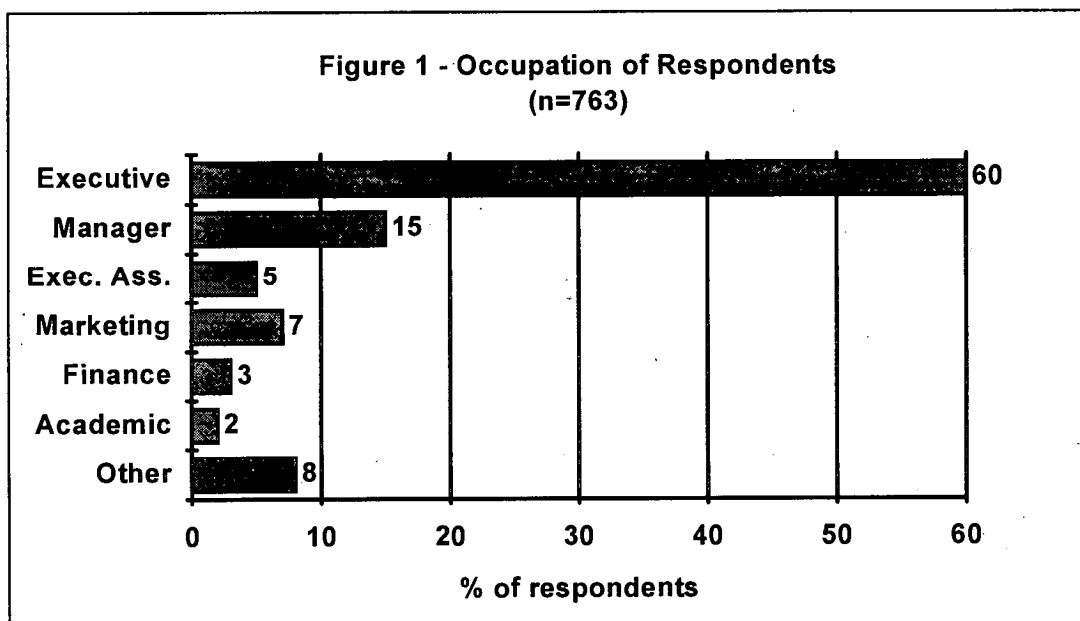
2.0 Profile of Respondents

This chapter presents a description of the survey respondents based on the nature of their organization, size and type of business, extent of exporting and previous participation in programs or activities sponsored by Foreign Affairs and International Trade Canada or Agriculture Canada.

The information can be used to gain a better understanding of publication recipients and to segment users into groups for product development, packaging or promotion purposes. For example, more than two-thirds of respondents were from very small or small businesses with fewer than 50 employees. Consequently the Department may consider packaging information on exporting strategies and "how to" tips for small enterprises with sourcing guides and market analyses, as previous research suggests this is an information need of this segment.²

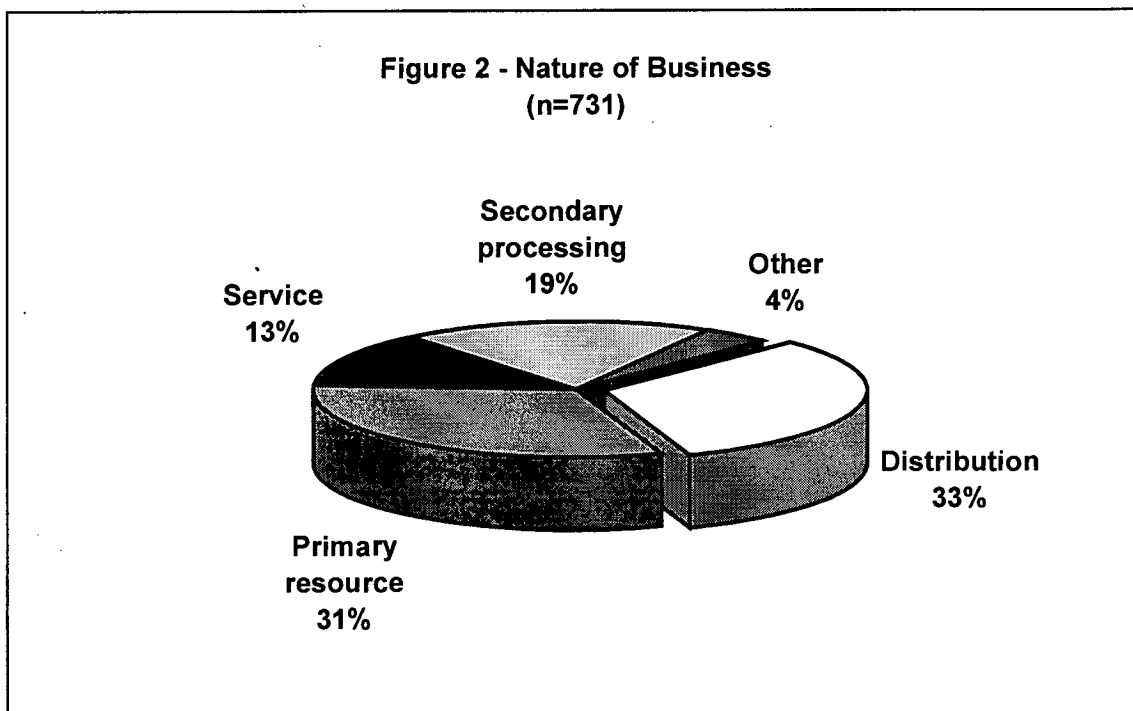
2.1 Organizational Profile

As shown in Figure 1, most respondents worked at a senior level, with 60% describing themselves as executives and another 15% as managers. The "other" category includes traders, brokers, librarians and others. The high proportion of managers in the sample may in part determine usage patterns. For example, the high proportion of executives in the sample may explain why many respondents indicated that the documents they receive are used primarily as a reference tool by others in their organization (see Section 3.2)



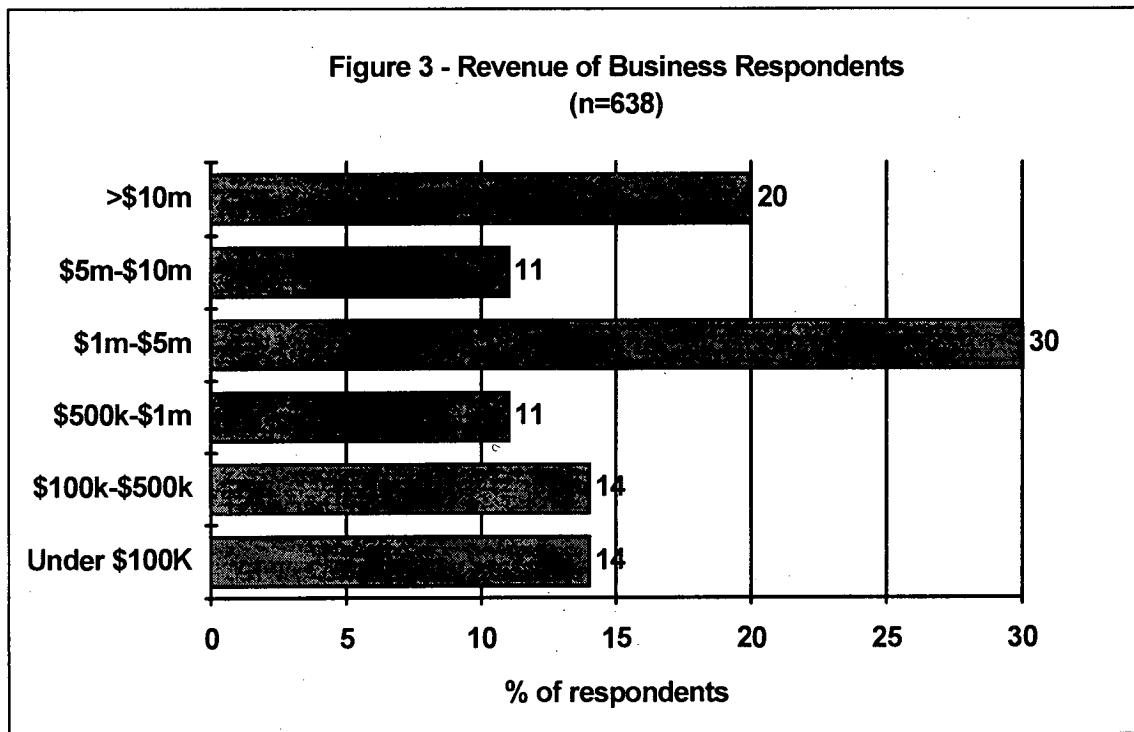
² Phase 5 Consulting Group Inc., *Qualitative Research on the International Trade Business Plan*, 1994, pp. 8-9.

The vast majority of respondents (92%) worked for private sector companies. Only five per cent worked for associations, one per cent worked in the educational sector, and the remainder worked in other types of organizations. Respondents from private companies worked in a variety of businesses. As shown in Figure 2, distributors and wholesalers (including export trading companies) comprised the largest group of private businesses, followed by primary resource producers. The "other" category includes respondents who described the nature of their business as import/export and trading.

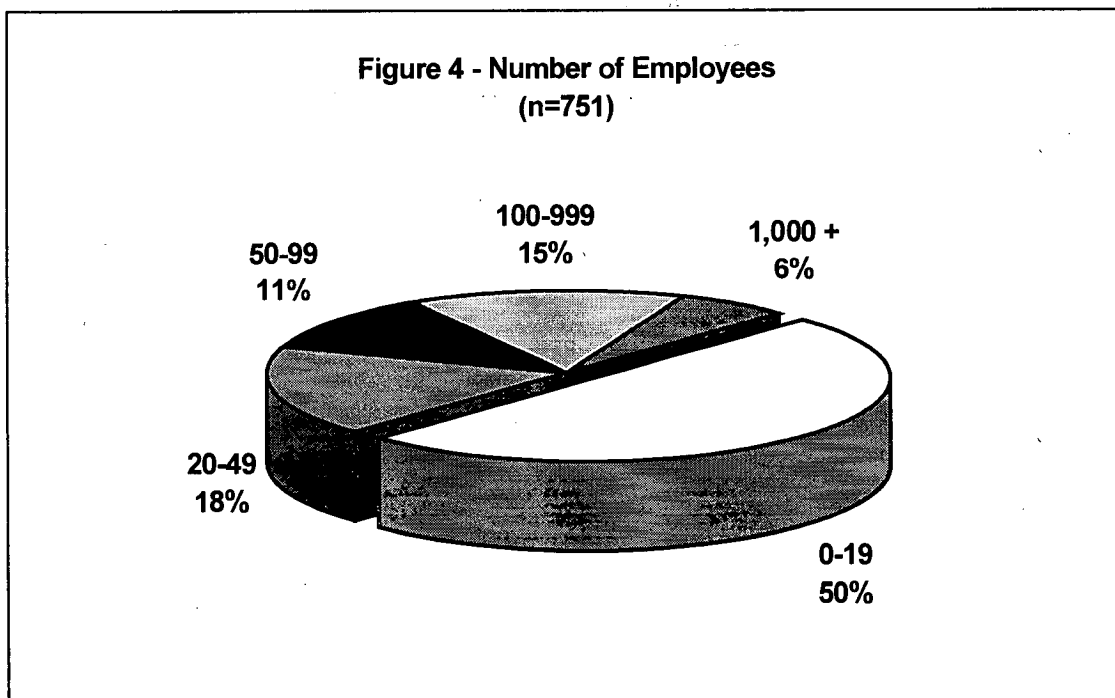


The businesses surveyed represented a range of earnings. As shown in Figure 3, more than 60% had \$1 million or more in revenue last year. The largest group earned between \$1 million and \$5 million last year.

Only 30% of the businesses had a primary export focus, earning half or more of their revenues from exporting. Some 45% of respondents earned less than 50% of earnings from export, while 25% of businesses surveyed said they earned no export revenues at all.

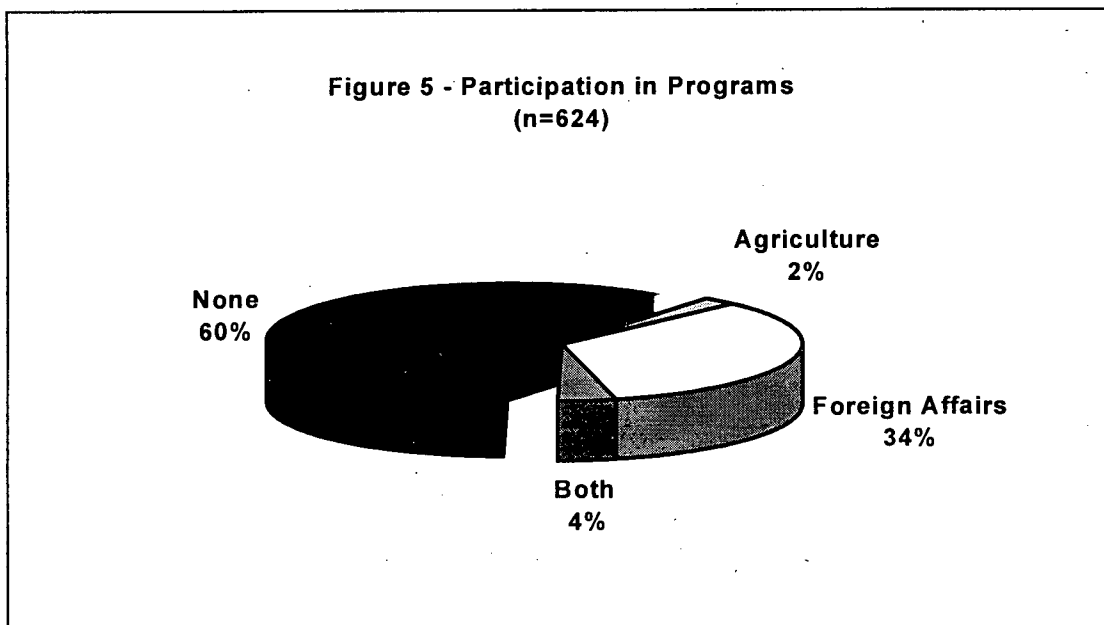


Most of the organizations surveyed were either very small or small in terms of number of employees. As shown in Figure 4, more than two-thirds had fewer than 50 employees. Only six per cent of respondents were from very large organizations employing 1,000 or more people.



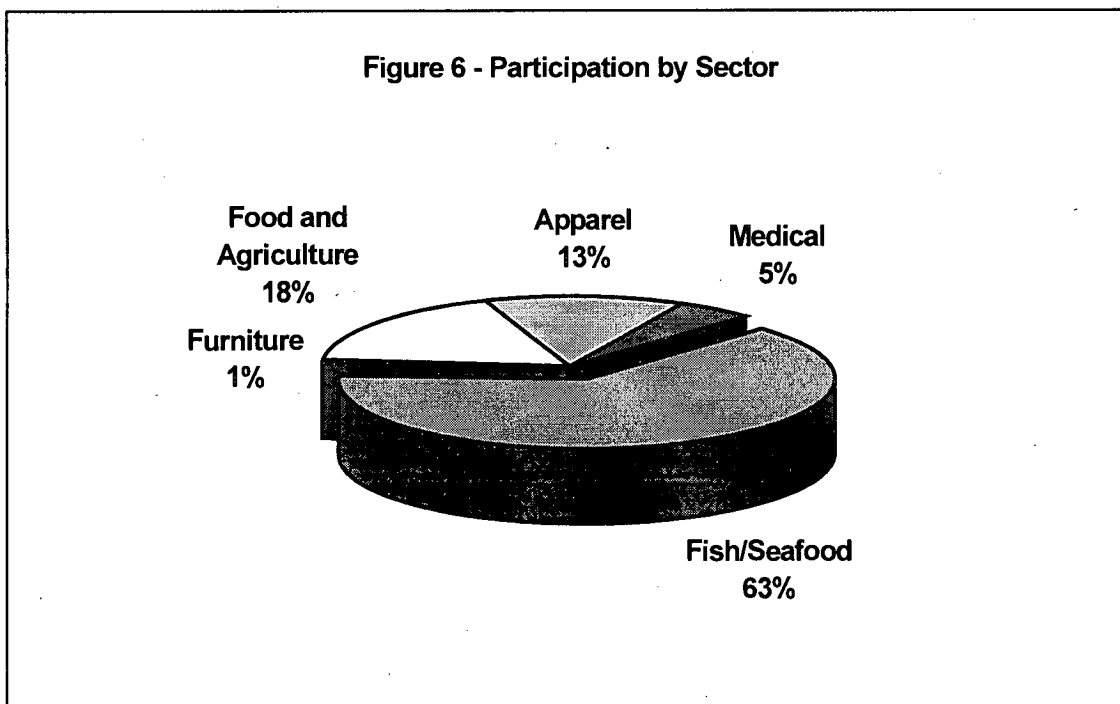
2.2 Participation in Foreign Affairs or Agriculture Canada Programs

Overall, 40% of respondents reported past participation in programs or activities sponsored by the Department of Foreign Affairs and International Trade or Agriculture Canada. As shown in Figure 5, most of those respondents who had participated were involved in activities sponsored by Foreign Affairs and International Trade. This broadly reflects the composition of the sample (i.e. 18% of the respondents worked in the food and agriculture sector)



2.3 Industrial Sector

As shown in Figure 6, most respondents who received publications were involved in the fish or seafood sectors. Contract furniture was the least represented sector, with only 1% of respondents. Again, this reflects the composition of the sample rather than the nature of the client population.



2.4 Participation by InfoCentre Clients

Forty-three per cent of the respondents had contacted the InfoCentre to request publications. Another 19% of respondents were unsure whether they had contacted the InfoCentre, suggesting that the Centre may lack a clear identity with some clients.

3.0 Publication Usage

This chapter examines how publications are used by respondents. Specifically, the following dimensions are assessed:

- recall and usage rates;
- circulation of publications within client organizations and retention; and
- uses and reasons for non-use.

The information in this chapter can be used to assess distribution strategies, to better understand how respondents use publications and to identify segments where Departmental publications may not be fulfilling information requirements.

3.1 Reception and Usage

Overall, the results showed that respondents recalled only 56% of the publications that were distributed to them. In part, this low level of recall can be explained by distribution dating back more than one year. Overall, publications that were mailed less than one year from the survey date were recalled 62% of the time compared to 50% for those mailed one to two-years before the survey and 39% for those mailed more than two years ago. Low recall levels may also be related to relevance in that respondents did not recall receiving publications because they were not directly relevant to their business interests (overall, 61% of respondents who did not use publications indicated lack of relevance as a reason).

Analysis of various segments showed some differentiation among recall rates. The following segments had *higher* than average recall rates:

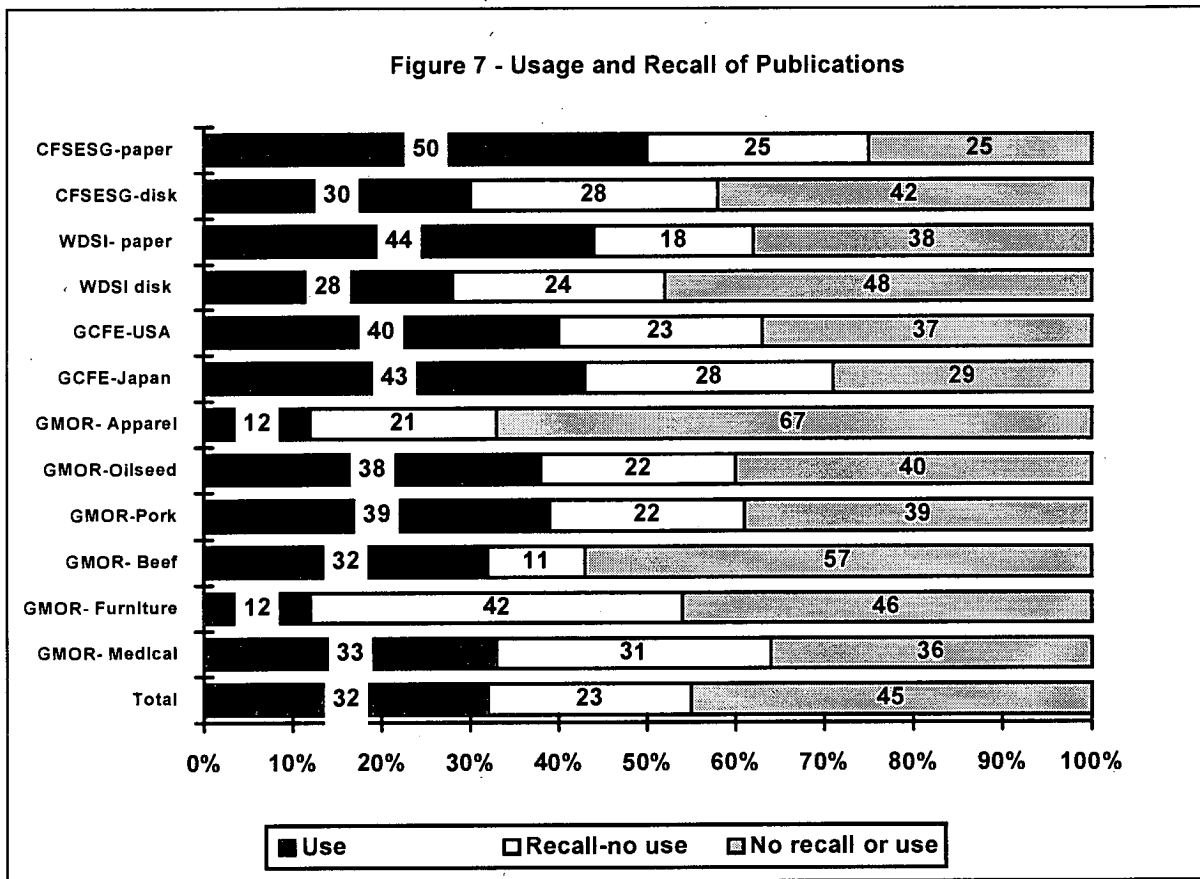
- organizations with less than \$100,000 in annual revenues;
- businesses that derived at least 50% of their earnings from export;
- service businesses;
- small businesses with fewer than 20 employees; and
- organizations that had participated in programs sponsored by Foreign Affairs and International Trade Canada.

Segments which had *lower* than average levels of recall can be characterized by:

- revenues of more than \$10 million per year;
- no export activity or a lower dependence on export activities; and
- between 20 and 100 employees.

Overall, only 32% of publications were used by respondents (or 59% of those where respondents recalled receiving them). As shown in Figure 7, of all the documents

reviewed in the survey, the Canadian Fish and Seafood Exporters Sourcing Guide (hard copy) had the highest rate of usage at 50%. The Global Market Opportunities Review - Apparel, on the other hand, had the lowest rate of recall at 33%. (However, it should be noted that the vast majority of copies of this title were mailed more than two years before the survey, which could account for lower recall rates). Global Market Opportunities Review -Furniture, and GMOR- Apparel, had the lowest rates of usage at 12% and 13% respectively. However, readers should keep in mind that the limited sample sizes for the Global Market Opportunity Reviews for Pork, Beef, Contract Furniture and Medical Devices mean that comparisons with other publications should be made with caution.



Usage rates for diskette format are likely understated for the following reasons:

- the Canadian Fish and Seafood Exporters Sourcing Guide (diskette) had a limited distribution list;
- both diskette publications were distributed just before the survey, and thus some respondents may not have received it or had the opportunity to use it.

Lack of relevance was the major reason cited by respondents for not using publications (39% of responses). This suggests that the distribution of the publications could be more focused, or that the information contents do not meet the needs of all audience segments, or both. Other major reasons respondents said they did not use the publications were:

- a lack of time (15%);
- no useful information was found in previous editions (12%);
- they no longer exported the product (5%);
- the information was too general (5%); and
- computers were not compatible with the diskette publication (6%).

Analysis of profiling variables revealed that the respondents from following segments tended to have *high* rates of usage:

- associations or educational institutions;
- businesses with sales of between \$1 and \$5 million;
- businesses which earned more than half their revenues from exporting; and
- organizations which had participated in programs or activities sponsored by Foreign Affairs and International Trade.

Segments with *low* usage rates; meanwhile, included:

- respondents who work in a financial occupation such as corporate treasurers and comptrollers; and
- organizations with no export activity in the previous year;

Respondents who contacted the InfoCentre to request documents did not have significantly higher overall usage rates than those who received documents through targeted distribution, suggesting that neither approach was more effective.

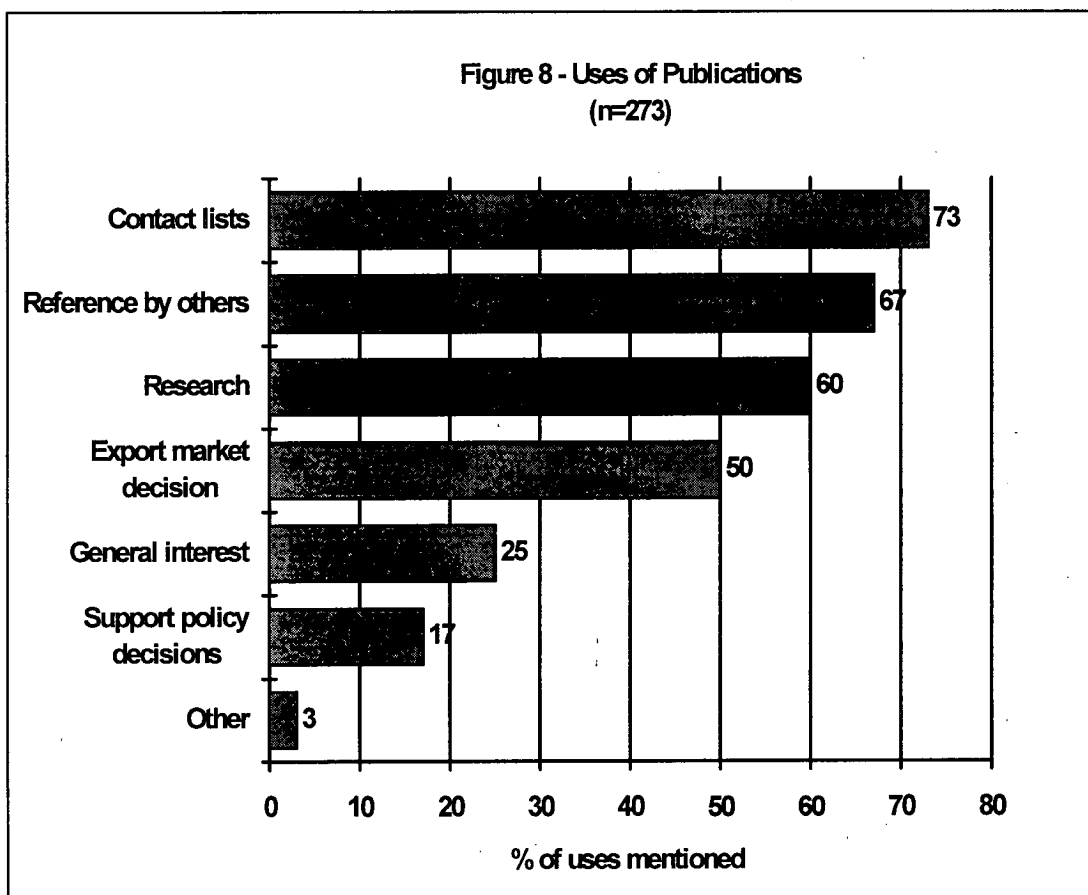
Overall, analysis of recall and usage shows that the dissemination of publications could be more focused on smaller businesses. Low levels of usage and recall also suggest that there are opportunities to trim distribution lists and to better target distribution within organizations. As both recall and usage tend to be related highly with participation in programs or activities sponsored by the Departments of Foreign Affairs and International Trade and/or Agriculture, these activities appear to present an ideal distribution channel.

Table 3 - Usage and Circulation Among Recipients

Publication	Use and circulate	Use but do not circulate	Do not use but circulate	Do not use or circulate
1. Canadian Fish and Seafood Exporters Sourcing Guide - hardcopy	41%	26%	11%	22%
2. Canadian Fish and Seafood Exporters Sourcing Guide - diskette	27%	25%	16%	32%
3. World Directory of Seafood Importers - hardcopy	32%	39%	4%	25%
4. World Directory of Seafood Importers - diskette	27%	27%	9%	37%
5. Guidelines for Canadian Fish Exporters - USA	33%	30%	7%	30%
6. Guidelines for Canadian Fish Exporters - Japan	29%	32%	10%	30%
7. GMOR for Apparel	19%	18%	16%	48%
8. GMOR for Oilseed	39%	23%	16%	22%
9. GMOR for Pork	45%	20%	25%	10%
10. GMOR for Beef	55%	20%	10%	15%
11. GMOR for Contract Furniture	14%	7%	29%	50%
12. GMOR for Medical Devices	20%	32%	32%	16%
Overall	31%	27%	12%	30%

3.2 Uses and Behaviour

As shown in Figure 8, the publications distributed by the Department are used mostly for their contact lists, as a reference tool used by someone other than the respondent, for research purposes, and to support decisions about export market development. It is also important to note that respondents use publications for more than one reason: on average, respondents who used the publications mentioned two uses.



The reach of Departmental publications is often extended by users: overall, respondents who recalled receiving documents circulated them to other people 43% of the time. As shown in Table 3, *opposite*, those respondents who use documents were about equally likely to circulate them as not. On the other hand, when documents are not used by the recipients, they are more than twice as likely not to be circulated. However, 12% of respondents did not use publications but circulated them to others within their organization. Administrators/office managers (25%) and executives/owners (14%) were more likely than other occupations to be among those who did not use publications, but passed them on to someone else. This suggests that distribution might be better targeted to people in certain functional positions (e.g. marketing, sales, business development).

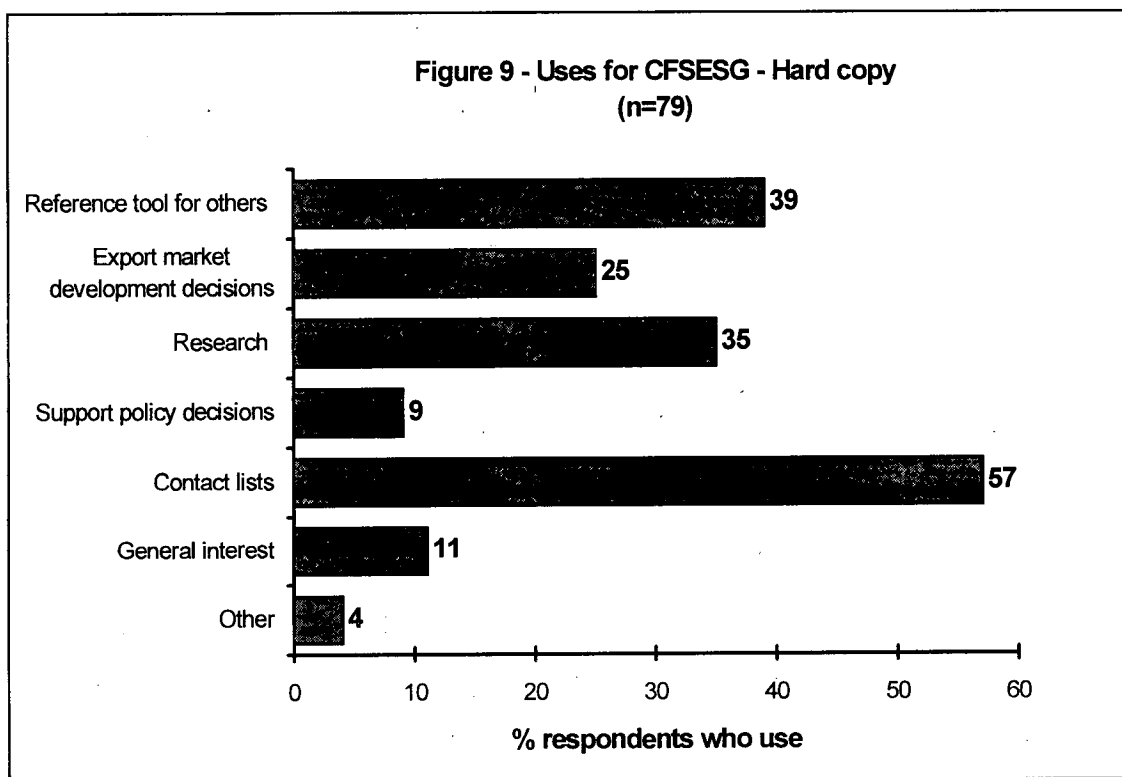
Of those documents that are circulated, nearly 80% are distributed to two or more people. In addition, Departmental publications were highly likely to be kept by users as on-going reference tools (in 87% of the cases), suggesting that they have on-going value to readers.

3.2.1 Canadian Fish and Seafood Exporters Sourcing Guide - Hard Copy

Almost 75% of respondents on the distribution list recalled receiving the Canadian Fish and Seafood Exporters Sourcing Guide (CFSESG) and, of these, 67% said they used it. Overall this means that 50% of those who were sent the document used it. Those who did not use the publication cited the following reasons:

- the subject matter was not directly relevant (37% of respondents who did not use it);
- a lack of time (16%); and
- inability to find useful information in previous editions (16%).

Respondents tended to use CFSESG for more than one reason. As shown in Figure 9 below, 57% of respondents said they use the publication for contact lists, while 25% used the publication to support export market development decisions.



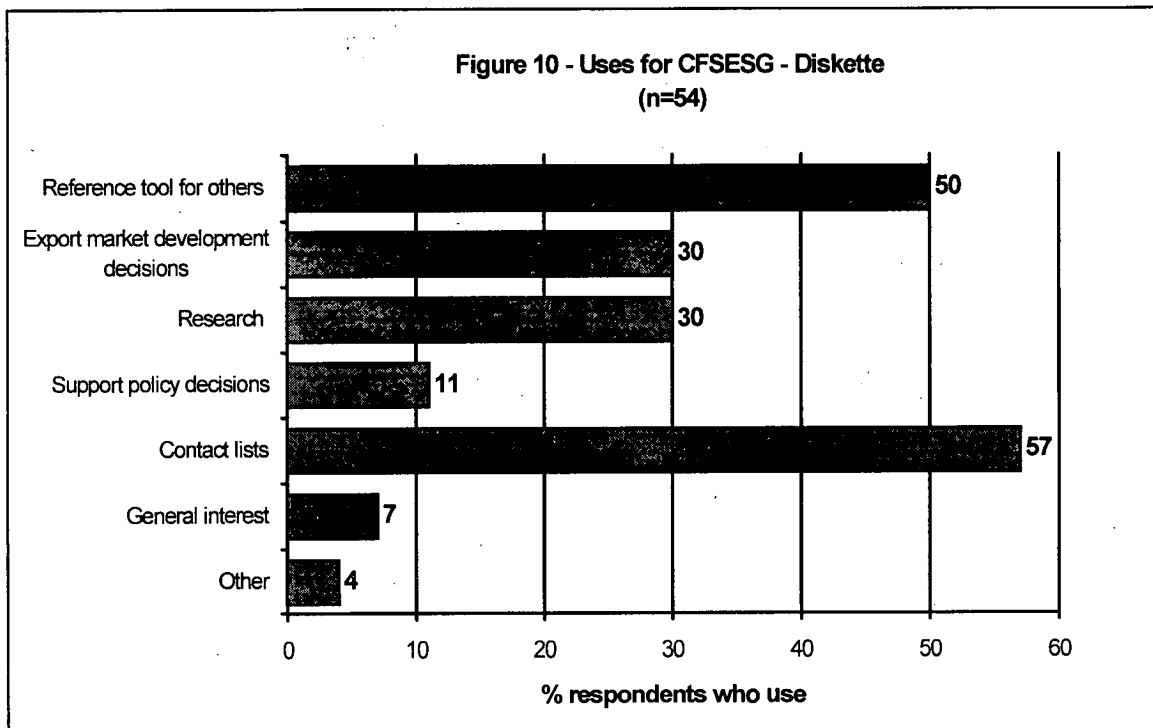
More than half (52%) of those who used the publication circulated it to other people within their organization. On average, those who circulated it passed it along to 5 other people. In addition, 88% of those who received the publication retained it for ongoing reference.

3.2.2 Canadian Fish and Seafood Exporters Sourcing Guide - Diskette

Only 58% of respondents recalled receiving the diskette version of CFSESG, and, of these, 52% said they used it. The low recall rate for the diskette version of the publication is likely due to limited distribution. Those who did not use the publication cited the following reasons:

- the subject matter was not directly relevant (29% of respondents who did not use it);
- computer compatibility problems (22%); and
- they had not found useful information in previous editions (8%).

As shown in Figure 10 below, 57% of respondents said they use the publication for contact lists, while 50% said the publication was used a reference tool by others. Almost one-third of respondents said they used the publication to support export market development decisions.



Fewer than half (43%) of those who used the publication circulated it to other people within their organization. On average, those who circulated it passed it along to three other people. In addition, 90% of those who received the publication retained it for ongoing reference.

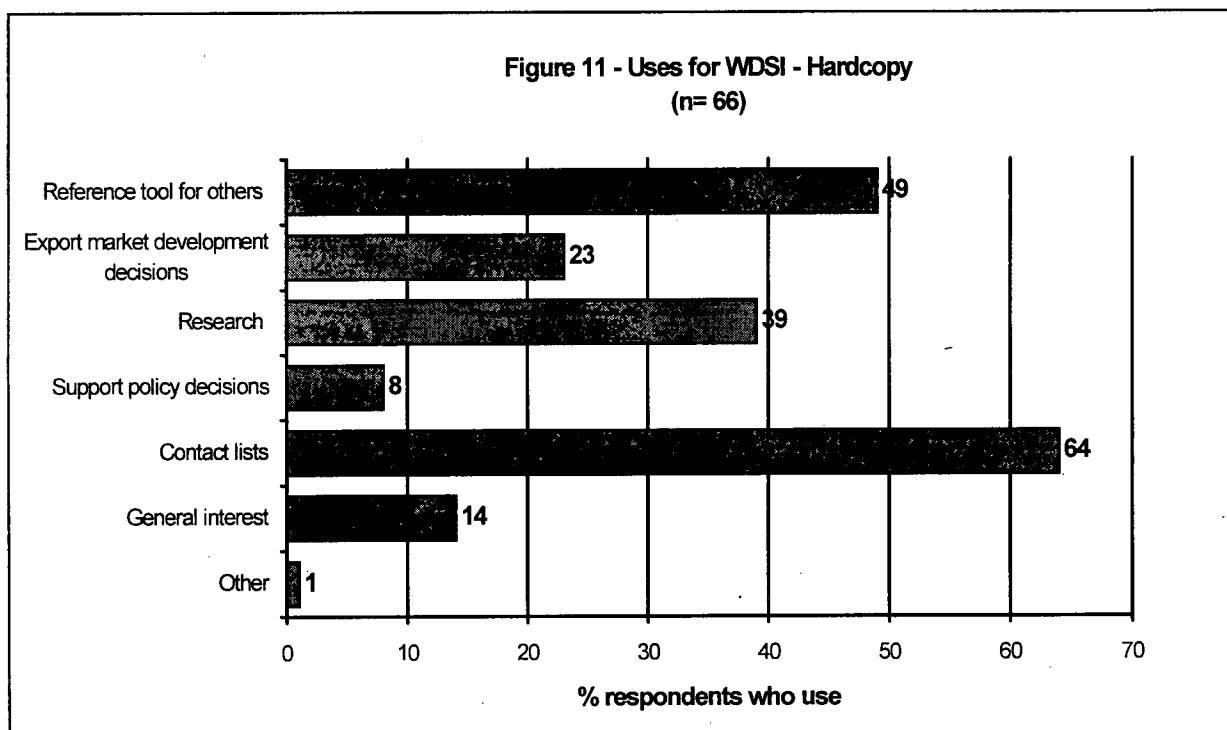
3.2.3 World Directory of Seafood Importers - Hardcopy

Almost two-thirds of the respondents (62%) on the distribution list recalled receiving the hardcopy version of the World Directory of Seafood Importers (WDSI). Of these, 71%

said they used it. Overall this means that 44% of those who were sent the document used it. Those who did not use the publication cited the following reasons:

- the subject matter was not directly relevant (26% of respondents who did not use it);
- a lack of time (22%); and
- they no longer fished or had fish to export (19%).

Respondents tended to use the WDSI for more than one reason. As shown in Figure 11, 64% of respondents said they use the publication for contact lists, while 23% used the publication to support export market development decisions. Another 39% used the publication for research purposes.



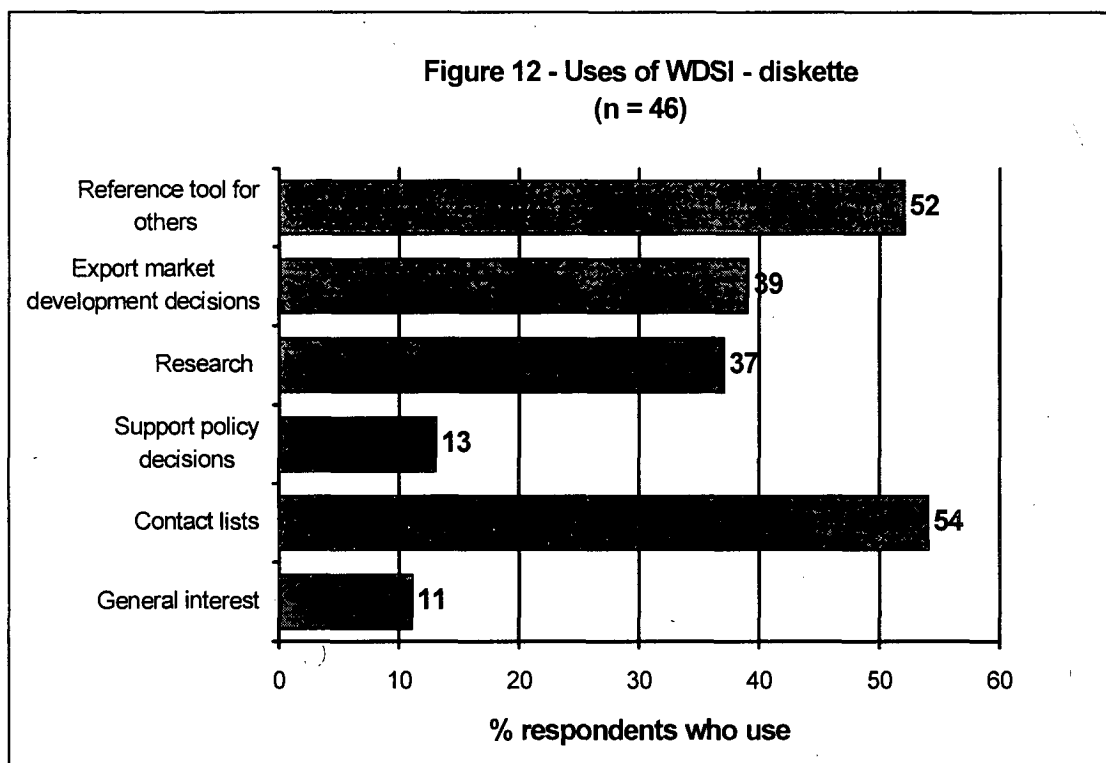
Slightly more than one-third (36%) of those who used the publication circulated it to other people within their organization. On average, those who circulated it passed it along to 8 other people. In addition, 95% of those who received the publication retained it for ongoing reference.

3.2.4 World Directory of Seafood Importers - Diskette

Only 52% of respondents on the distribution list recalled receiving the diskette version of the World Directory of Seafood Importers (WDSI). Again, this document was distributed approximately one week before the survey occurred, with resulting implications for recall and usage rates. Of these, 54% said they used it. Those who did not use the publication cited the following major reasons:

- the subject matter was not directly relevant (26% of respondents who did not use it);
- computer compatibility problems (23%);
- a lack of time (18%); and
- they had not found useful information previous editions (10%).

As shown in Figure 12, the diskette version of the World Directory of Seafood Importers is primarily used for contact lists. Respondents also tend to use the publication as a reference tool and to support export market development decisions.



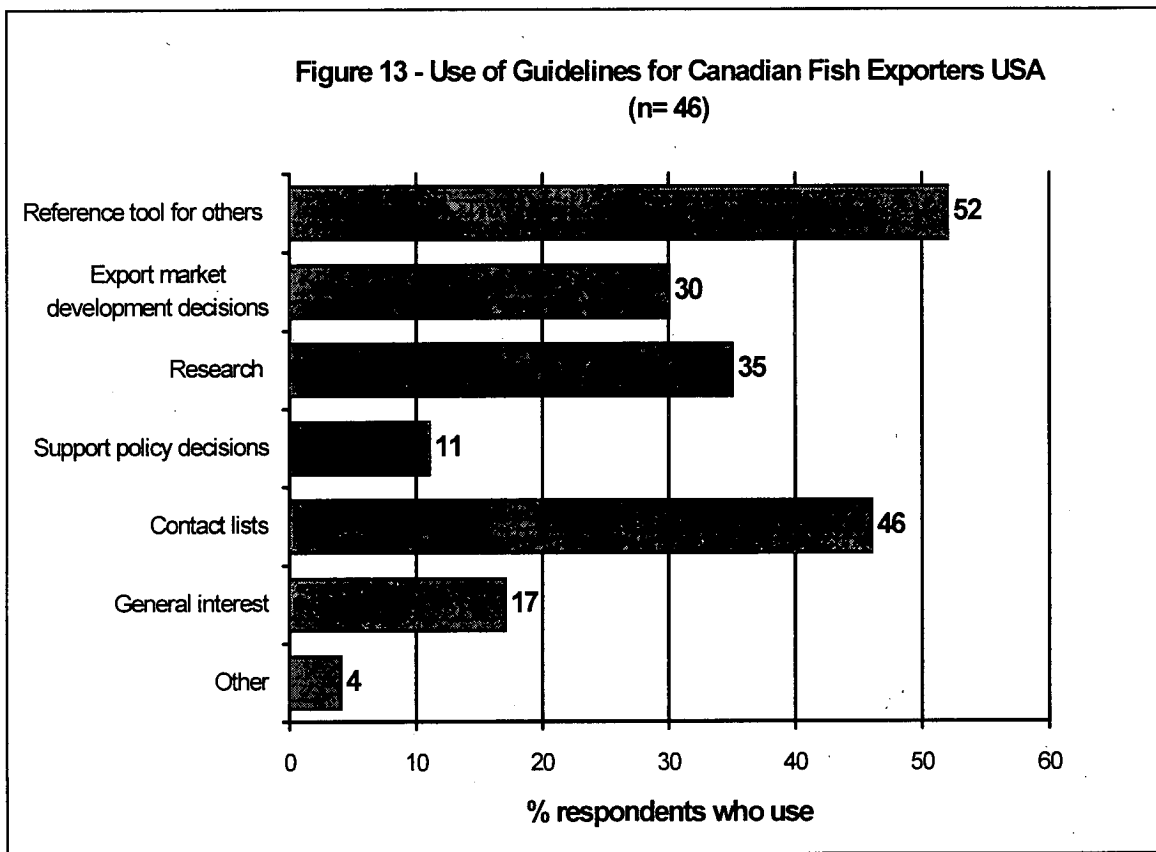
More than one-third (37%) of the respondents said they circulated the document to others within their organization, distributing it on average to 6 other people. Furthermore, 86% of respondents said they retain the publication for on-going reference.

3.2.5 Guidelines for Canadian Fish Exporters - USA

Fewer than two-thirds of the respondents (63%) on the distribution list recalled receiving Guidelines for Fish Exporters - USA. Of these, 63% said they used it. Overall this means that 40% of those who were sent the document used it. Those who did not use the publication cited the following reasons:

- the subject matter was not directly relevant (46% of respondents who did not use it);
- previous editions did not contain useful information (15%);
- they no longer fished or had fish to export (15%); and
- the information was too general (12%).

As shown in Figure 13, respondents who received the Guidelines for Canadian Fish Exporters - USA were most likely to keep it as a reference tool for use by others or use it for contact lists. Almost one-third of respondents said they used it in making decisions about export market development.



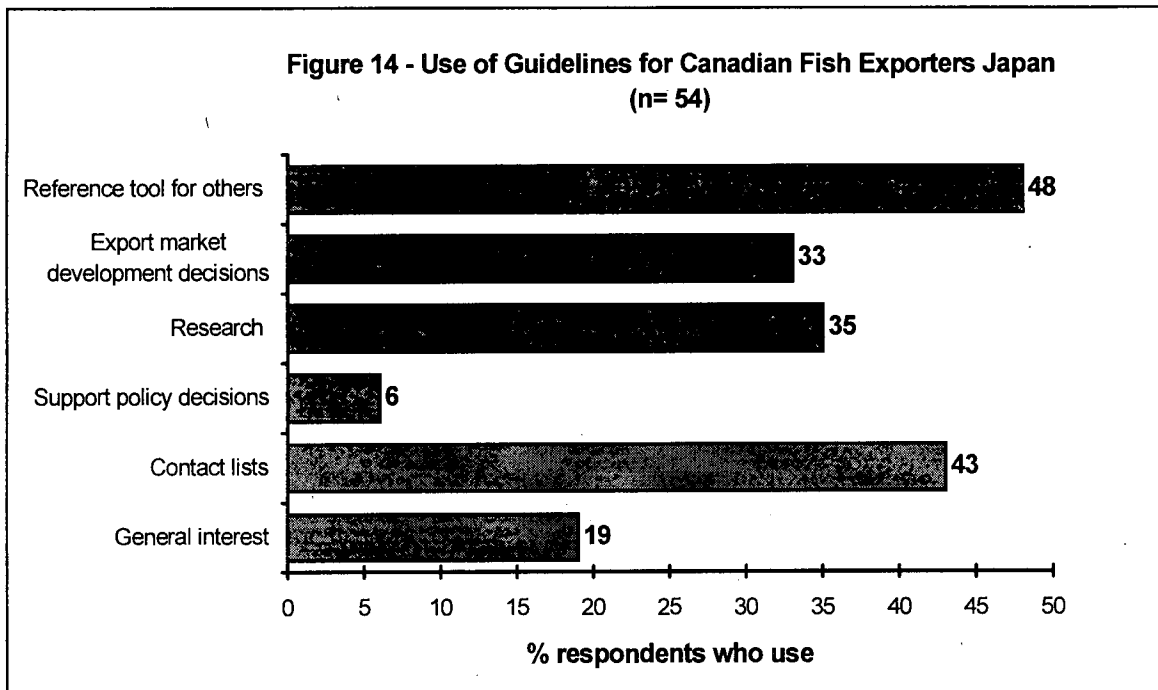
About 40% of respondents who used the publication circulated it to other people within their organization. On average, those who circulated it passed it along to 3 other people. In addition, 91% of those who received the publication retained it for ongoing reference.

3.2.6 Guidelines for Canadian Fish Exporters - Japan

More than 70% of respondents on the distribution list recalled receiving Guidelines for Fish Exporters - Japan. Of these, 60% said they used it. Those who did not use the publication cited the following reasons:

- the subject matter was not directly relevant (49% of respondents who did not use it);
- previous editions did not contain useful information (11%);
- the information was too general (11%); and
- a lack of time (11%).

As shown in Figure 14, respondents tended to use the Guidelines for Canadian Fish Exporters - Japan as a reference tool for use by others or use it for contact lists. One-third of respondents said they used it in making decisions about export market development.



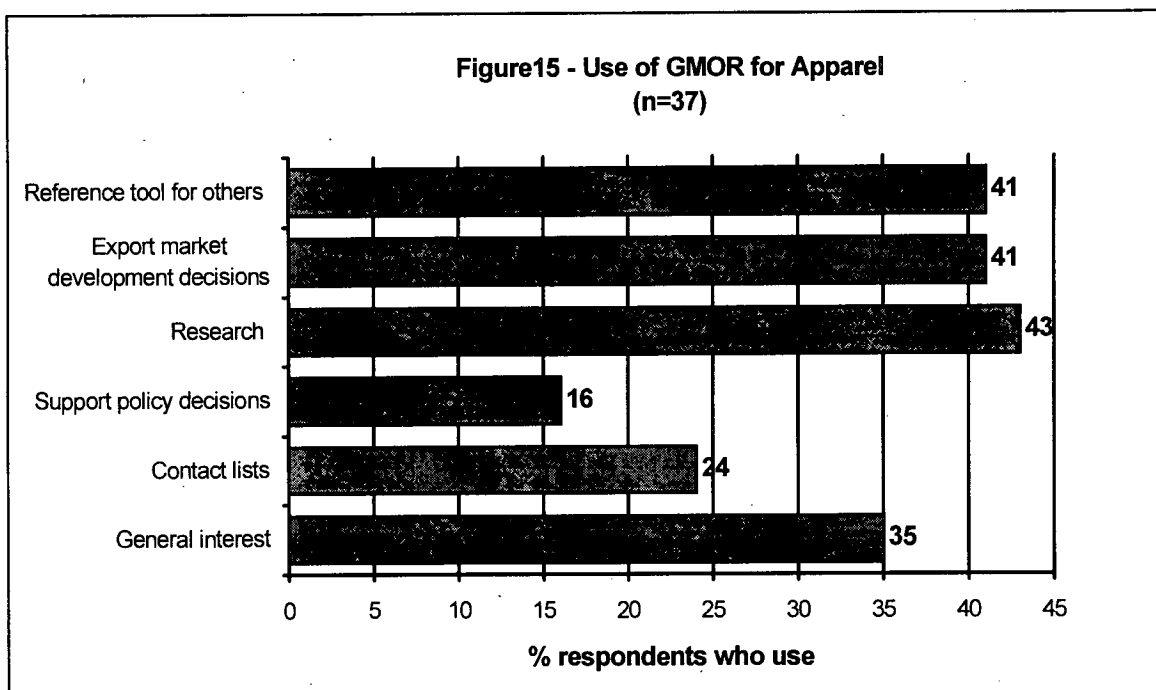
Thirty-nine per cent of readers who used the publication circulated it to other people within their organization. On average, those who circulated it passed it along to 4 other people. In addition, 90% of those who received the publication retained it for ongoing reference.

3.2.7 Global Market Opportunities Review for Apparel

Only 33% of respondents on the distribution list recalled receiving Global Market Opportunities Review for Apparel, likely due to the time elapsed between the survey and the date of distribution. Of those who received it, 36% said they used it. Overall this means that about 12% of those who were sent the document used it. Those who did not use the publication cited the following key reasons:

- the subject matter was not directly relevant (64% of respondents who did not use it);
- lack of time (14%);
- previous editions did not contain useful information (14%); and
- the information was too general (5%).

As shown in Figure 15, respondents who received the GMOR for Apparel were most likely to use it for research purposes, to make decisions about export market development, or as a reference tool.



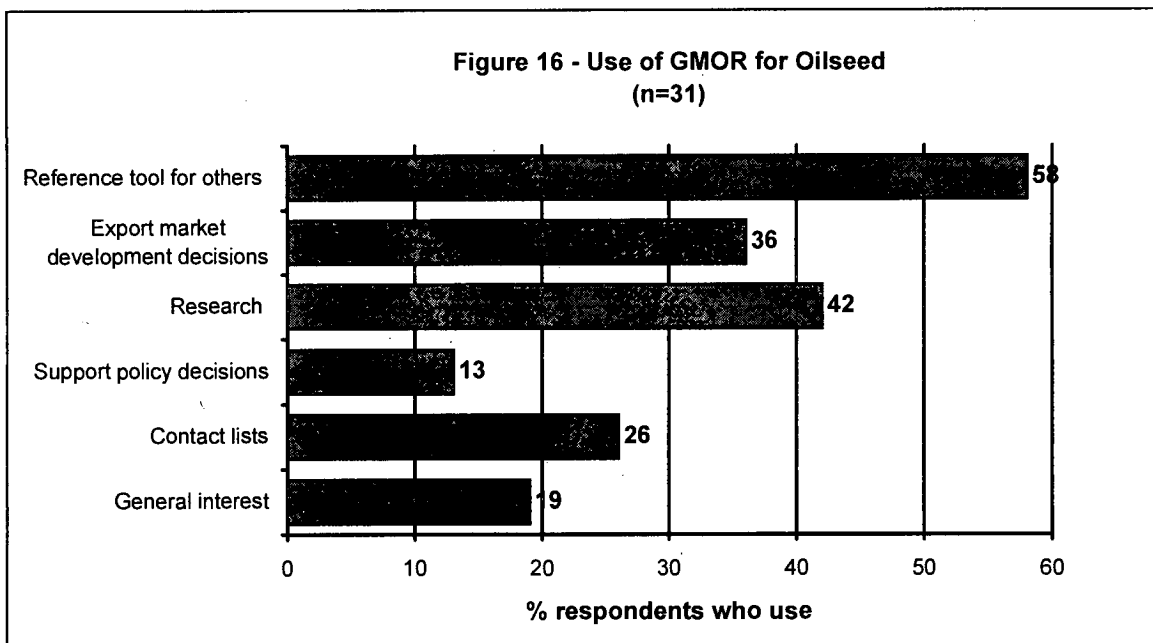
Thirty-four per cent of readers who received the publication circulated it to other people within their organization. On average, those who circulated it passed it along to three other people. In addition, 70% of those who received the publication retained it for ongoing reference.

3.2.8 Global Market Opportunities Review for Oilseed

Sixty per cent of respondents on the distribution list recalled receiving Global Market Opportunities Review for Oilseed. Of these, 63% said they used it. Overall this means that 38% of those who were sent the document used it. Those who did not use the publication cited the following reasons:

- the subject matter was not directly relevant (42% of respondents who did not use it);
- previous editions did not contain useful information (16%);
- the publication was distributed to others (11%); and
- a lack of time (26%).

As shown in Figure 16, respondents who received the GMOR for Oilseed were most likely to keep it as a reference tool for use by others, or for research purposes. More than one-third of respondents said they used it in making decisions about export market development.



Fifty-five per cent of readers who used the publication circulated it to other people within their organization. On average, those who circulated it passed it along to 4 other people. In addition, 91% of those who received the publication retained it for ongoing reference.

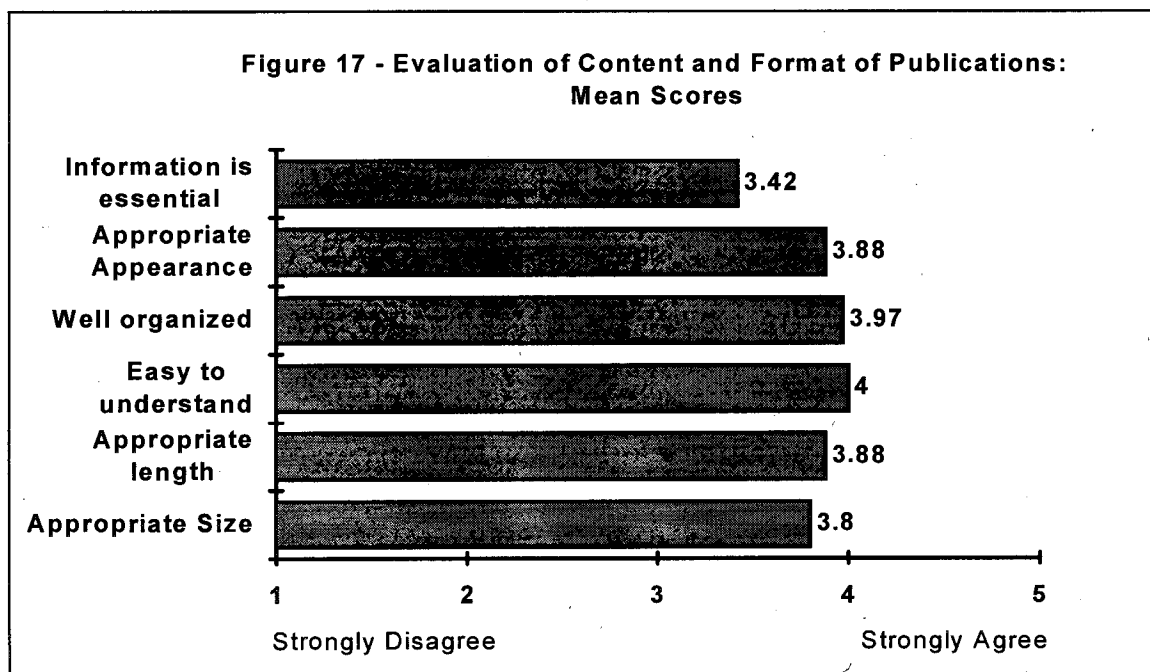
4.0 Content, Format and Delivery Media

This chapter presents findings related to the format and content of the publications. The results can be used to assess reader response to various features of the publication and to identify potential problem areas. In addition, the findings provide a basis for making decisions about dissemination media (e.g. hardcopy versus diskette). Results are presented in aggregate and by publication where the sample size is large enough to warrant analysis (n=30+).

4.1 Overall Findings

4.1.1 Content and Format

As shown in Figure 17, respondents who used publications distributed by the Department tended to assess content and format features quite favourably. This suggests that overall, respondents do not perceive major problems with the information content, appearance and layout, organization, clarity, length and size. This is supported by the fact that when asked what changes they would make to the document, 77% of the time the answer was "none".

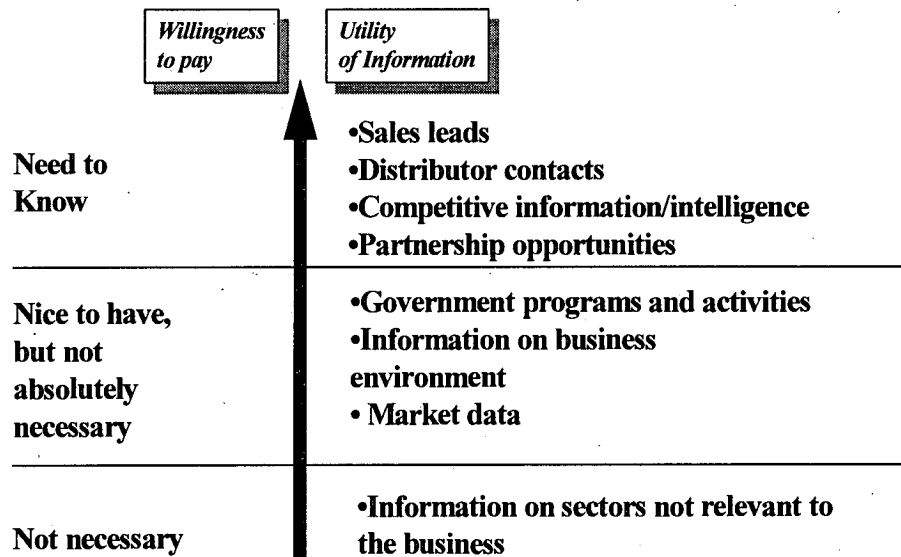


However, the importance of the information tended to be rated lower than those elements pertaining to format. Furthermore, most suggestions related to improvements concerned the specificity or timeliness of the information. Findings from past qualitative research³ suggest that business people consider information essential, and are more

³ Phase 5 Consulting Group Inc., *Qualitative Research on the International Trade business Plan*, 1994.

willing to pay for it, when it can be directly linked to sales. As shown in Exhibit 1 below, sales leads, distributor contacts and competitive intelligence are considered essential.

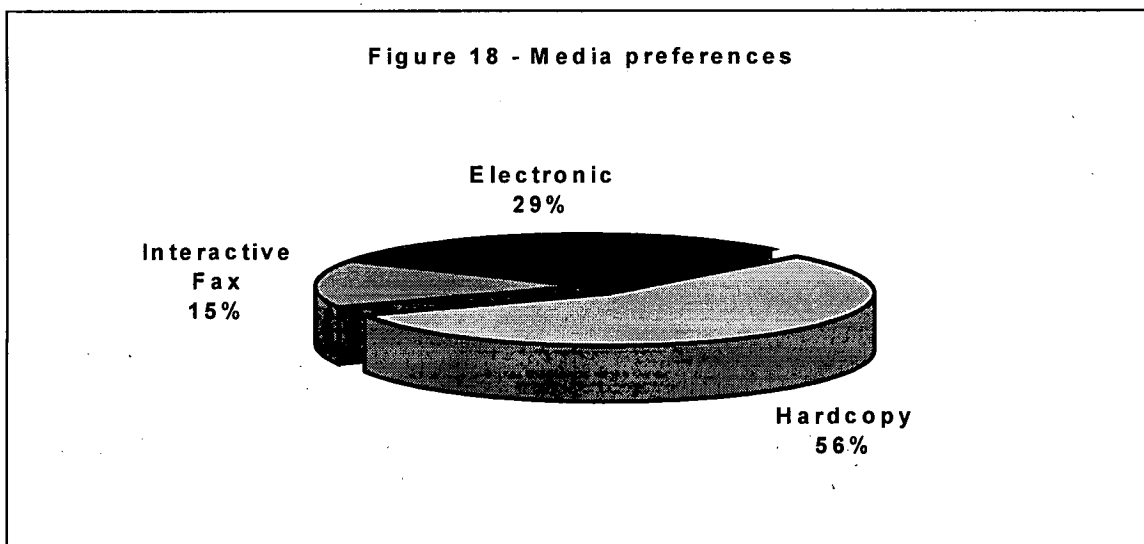
Exhibit 1 Hierarchy of Information Needs



Because at least six out of 12 publications examined in this study contained other types of information (e.g. market analyses) that is viewed as "nice to have, but not absolutely necessary" the lower mean score for information utility is not surprising. Overall, those publications which focused on contact information, lists or directories (CFSESG, WDSI, GCFEs) received significantly higher mean scores for utility of information (3.59) compared to the Global Market Opportunity Reviews (2.91).

4.1.2 Delivery Media

Users of Departmental publications expressed an interest in receiving the information in more than one medium (e.g. hard copy and diskette). On average, each respondent indicated just over two delivery media or dissemination vehicle preferences. However, as shown in Figure 18, hard copy was most frequently mentioned as the preferred format. Even those respondents who used diskette versions of publications indicated a preference for paper publications (see sections 4.2.2 and 4.2.4). This suggests that while alternative dissemination vehicles such as diskettes and bulletin boards may be implemented, paper versions of the publications should be retained to meet user preferences.



In those instances where electronic media were preferred:

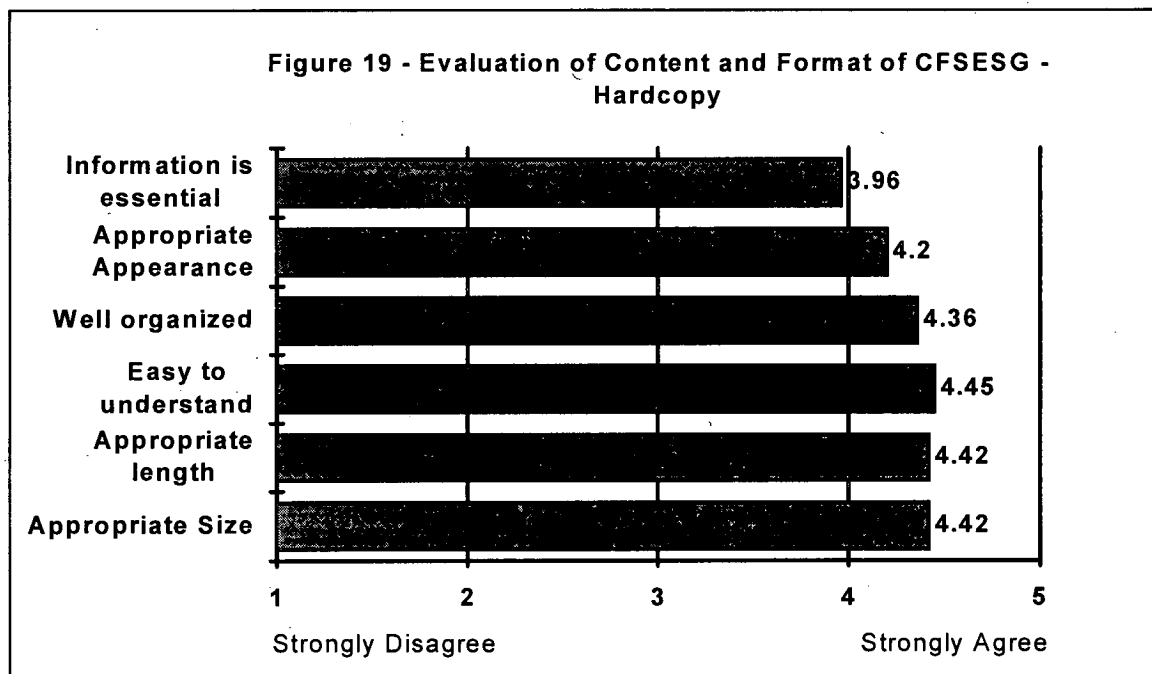
- 70% of respondents preferred a diskette version of the publication;
- 12% preferred Internet access;
- 11% preferred a direct-dial bulletin board service; and
- 7% preferred a CD ROM.

Based on the results of the survey, the vast majority of respondents' preferences can be accommodated with paper and diskette versions of the publications.

4.2 Findings by Publication

4.2.1 Canadian Fish and Seafood Exporters Sourcing Guide - Hardcopy

As shown in Figure 19 below, respondents tended to rate content and format elements of the publication favourably. Respondents were most impressed with the clarity of the writing. While the importance of the information was rated lowest, the ranking is high in comparison with other publications.

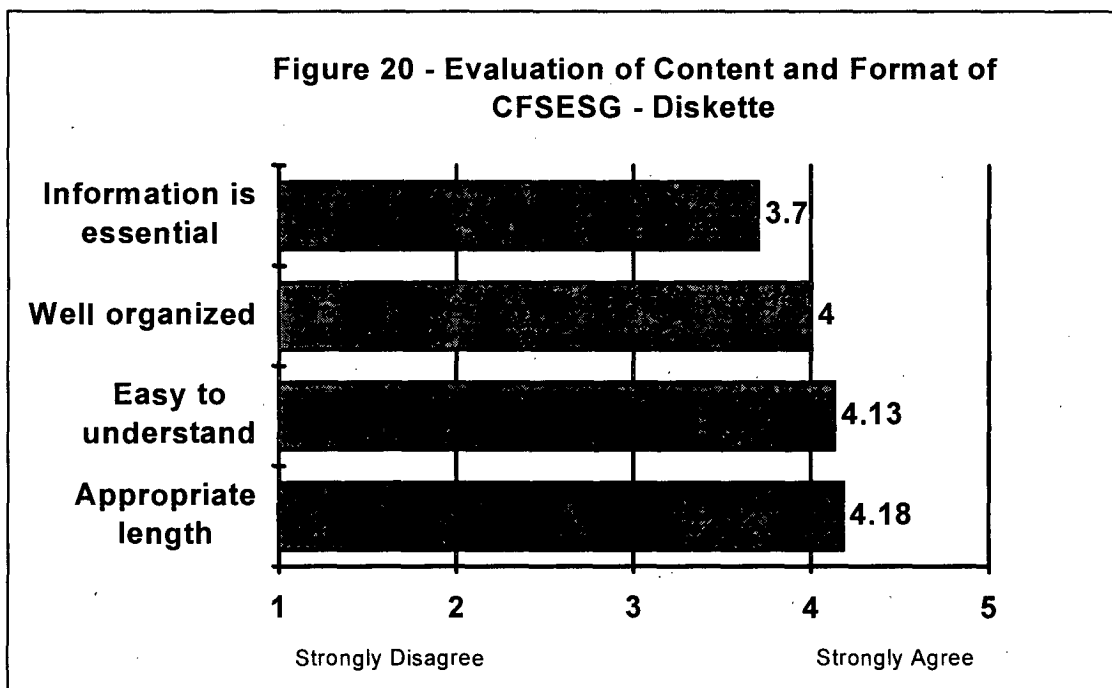


Overall, readers indicated a preference for hardcopy format (55%) vs. interactive fax (12%) or electronic formats (33%). Of those who indicated a preference for electronic format:

- 73% would prefer the document on diskette;
- 15% via the Internet;
- 6% would like to receive it on CD ROM; and
- 6% on a direct-dial BBS.

4.2.2 Canadian Fish and Seafood Exporters Sourcing Guide - Diskette

Respondents tended to rate content and format elements of the publication less favourably than the hardcopy version (see Figure 20). The length of the document and the ease of understanding the writing received the highest ratings, while the organization of the document and the importance of the information were rated lower. (Size and appearance were not rated for diskette versions of publications).



Interestingly, readers who used the diskette version of the publication indicated a preference for hard copy media (51%), vs. electronic media (40%) or interactive fax (9%). Of those who indicated a preference for electronic format:

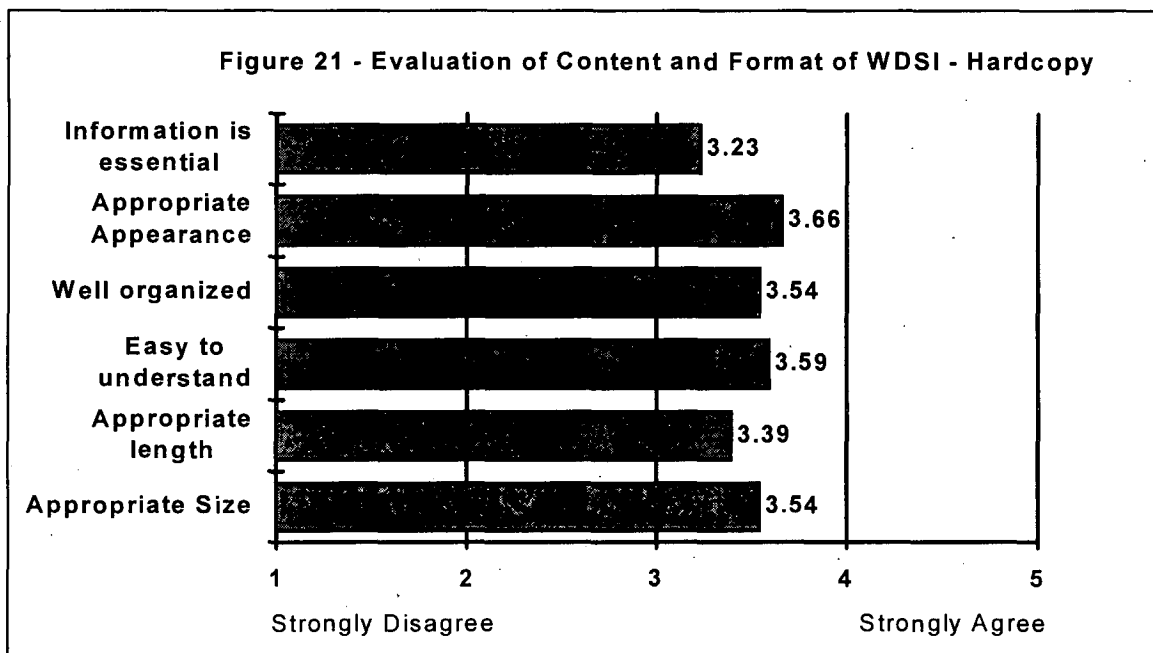
- 77% would prefer the document on diskette;
- 10% would like to obtain it via the Internet;
- 10% via a direct-dial BBS; and
- 3% would like to receive it on CD ROM.

4.2.3 World Directory of Seafood Importers - Hard Copy

As shown in Figure 21, respondents rated the appearance and clarity of writing highest. In comparison with other factors, the importance of the information was rated lowest.

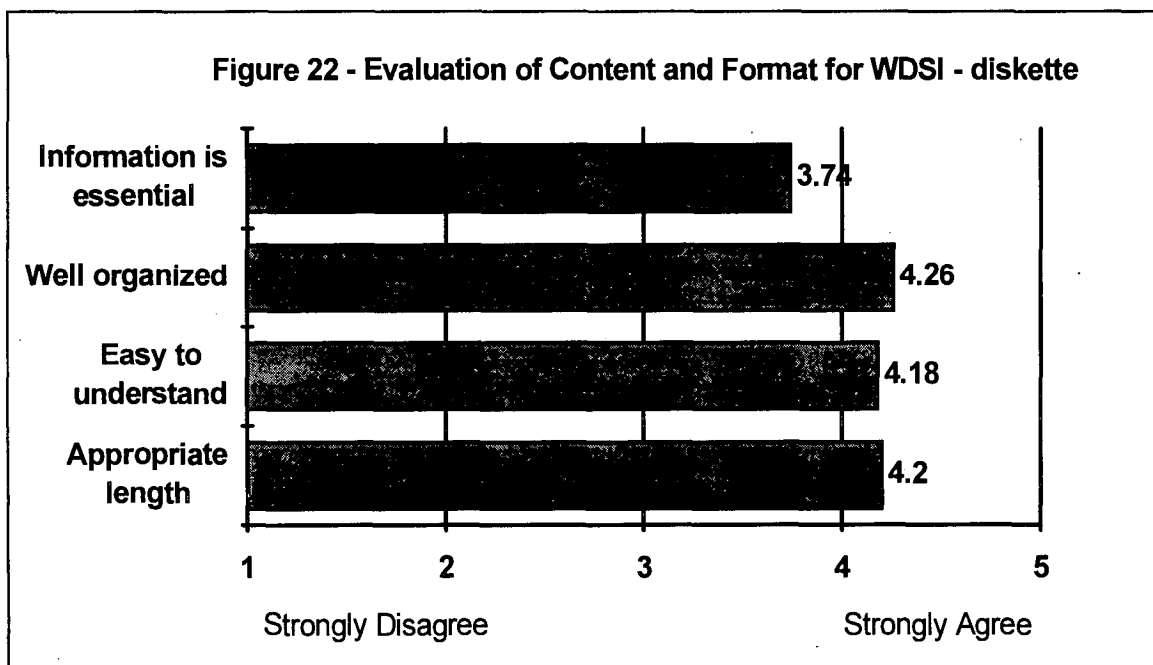
Overall, readers indicated a preference for hardcopy format (58%) vs. interactive fax (13%) or electronic formats (29%). Of those who indicated a preference for electronic format:

- 72% would prefer the document on diskette;
- 16% on a direct-dial BBS;
- 8% would like to receive it via the Internet; and
- 4% would like to receive it on CD ROM.



4.2.4 World Directory of Seafood Importers - Diskette

In the case of the World Directory of Seafood Importers - diskette, respondents rated the content and format elements of the publication *more* favourably than the hardcopy version (see Figure 22). The organization of the document and the length received the highest ratings. (Size and appearance were not rated for diskette versions of publications).

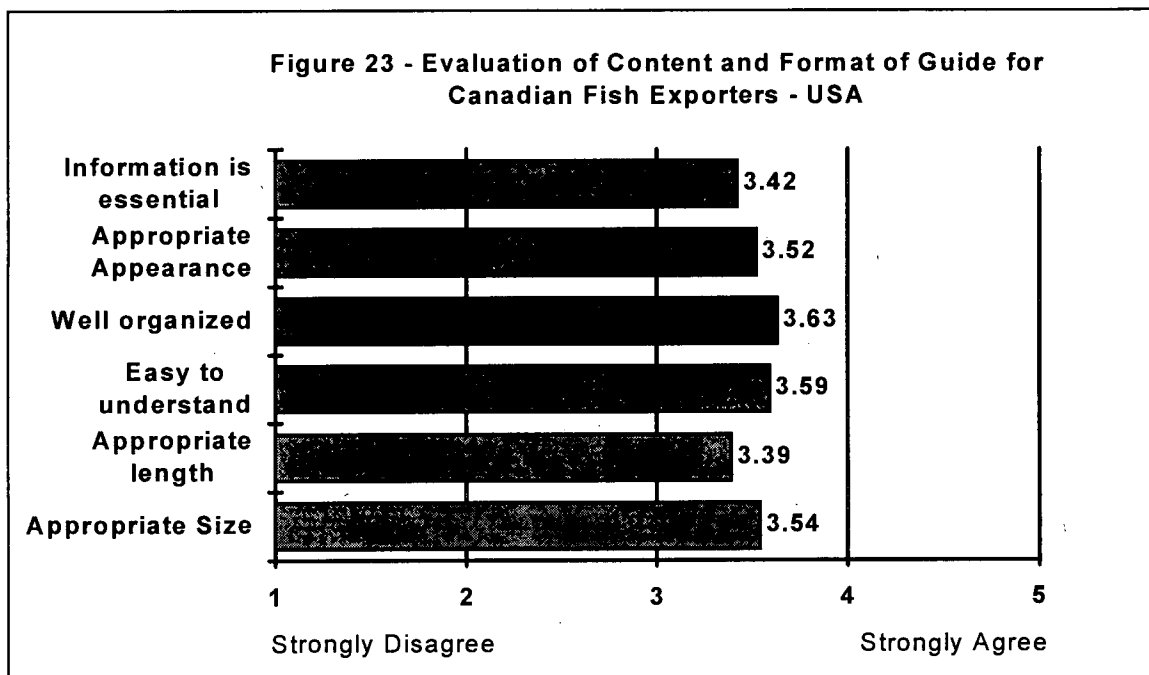


Again, users of the diskette version of this publication expressed a preference for hardcopy media (51%) versus electronic delivery (39%) or interactive fax (10%). Those

who did express a preference for electronic delivery overwhelmingly preferred diskettes (77%) as opposed to other media.

4.2.5 Guidelines for Canadian Fish Exporters - USA

Figure 23, below, provides the mean score of respondent evaluations of content and format elements. Respondents tended to rate the organization of the document slightly higher than other elements.

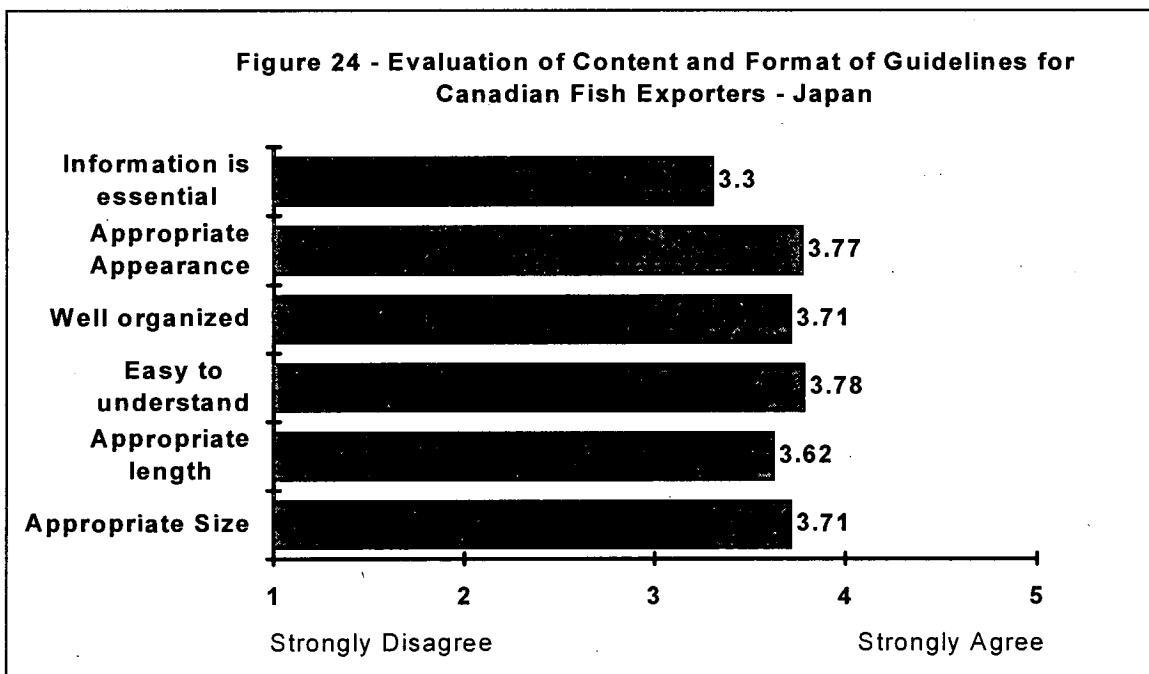


Overall, readers indicated a preference for paper formats (63%) vs. interactive fax (12%) or electronic delivery (25%). Of those who indicated a preference for electronic media:

- 79% would prefer the document on diskette;
- 7% would like to receive it on CD ROM; and
- 14% on a direct-dial BBS.

4.1.6 Guidelines for Canadian Fish Exporters - Japan

Figure 24, below, provides the mean score of respondent evaluations of content and format elements. Overall, respondents rated the organization, layout and format elements higher than the information content of the publication.

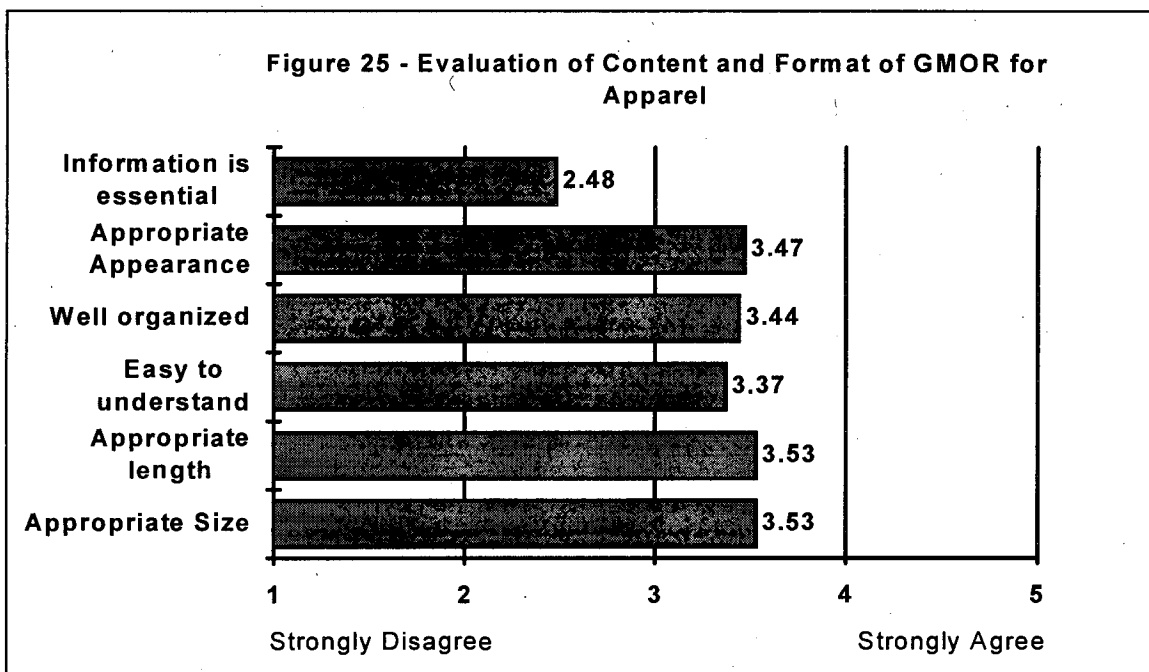


Respondents indicated a preference for hardcopy (62%) vs. interactive fax (13%) or electronic formats (25%). Of those who indicated a preference for electronic media:

- 83% would prefer the document on diskette;
- 11% would like to receive it via the Internet; and
- 6% on a direct-dial BBS.

4.1.7 Global Market Opportunities Review - Apparel

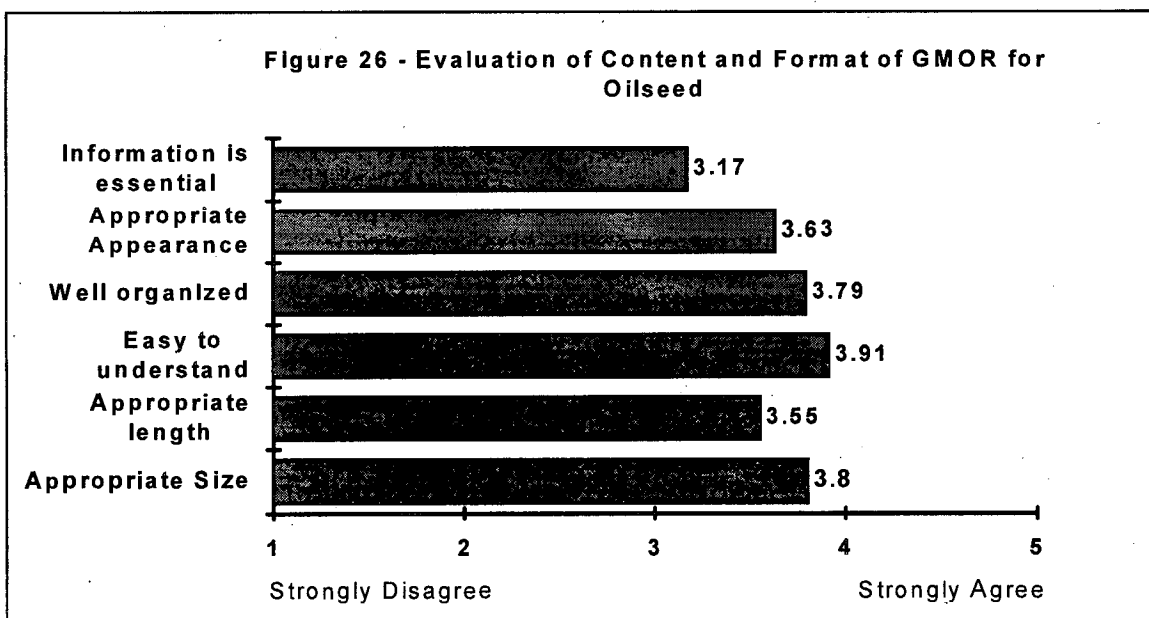
Figure 25 provides the mean score of respondent evaluations of content and format elements. Overall, respondents rated the organization, layout and format elements much higher than the information content of the publication.



Overall, readers indicated a preference for hardcopy format (62%) vs. interactive fax (30%). Only 8% of respondents indicated a preference for electronic formats.

4.1.8 Global Market Opportunities Review - Oilseed

Figure 26, provides the mean score of respondent evaluations of content and format elements. Respondents rated the writing, size and organization of publication highest.



Readers indicated a preference for hardcopy media (62%), although electronic formats were mentioned as a preferred format 25% of the time. Of those who expressed a preference for electronic media:

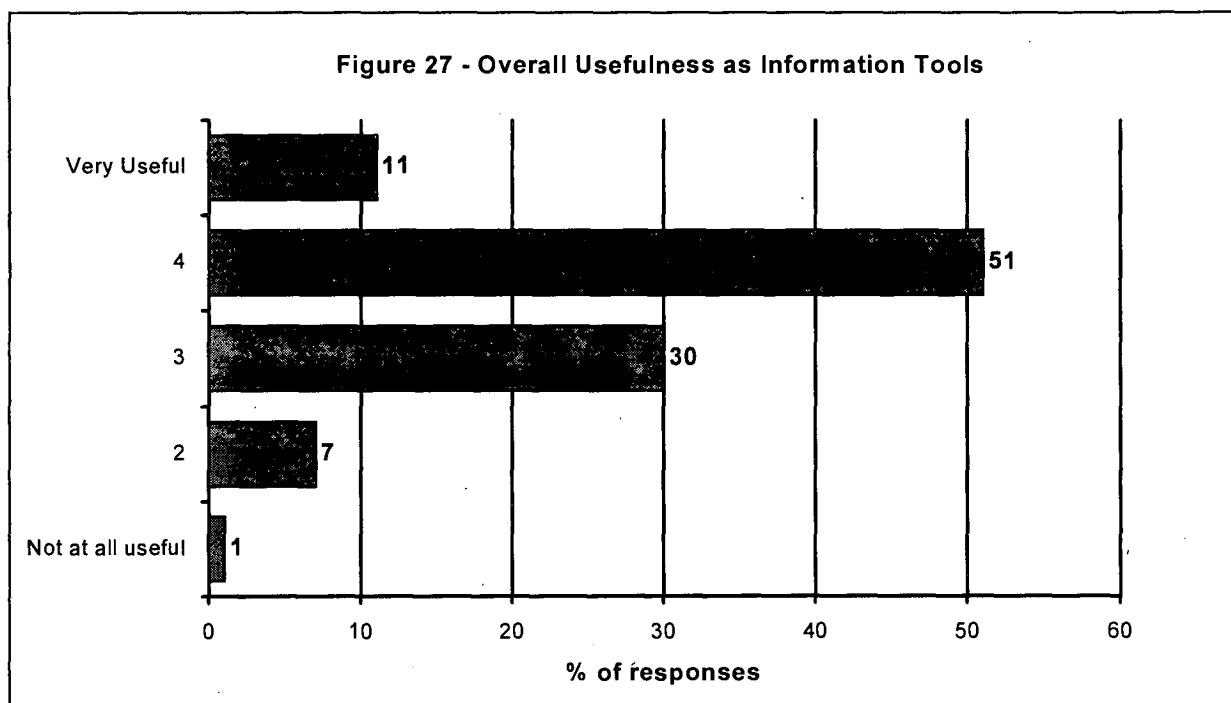
- 83% would prefer the document on diskette;
- 11% would like to receive it via the Internet; and
- 6% on a direct-dial BBS.

5.0 Utility and Impact

This chapter examines the overall usefulness of publications distributed by the Department and their impact on readers. The findings in this chapter provide aggregate and individual assessments of the publications in terms of respondents' perceptions and behaviour.

5.1 Utility

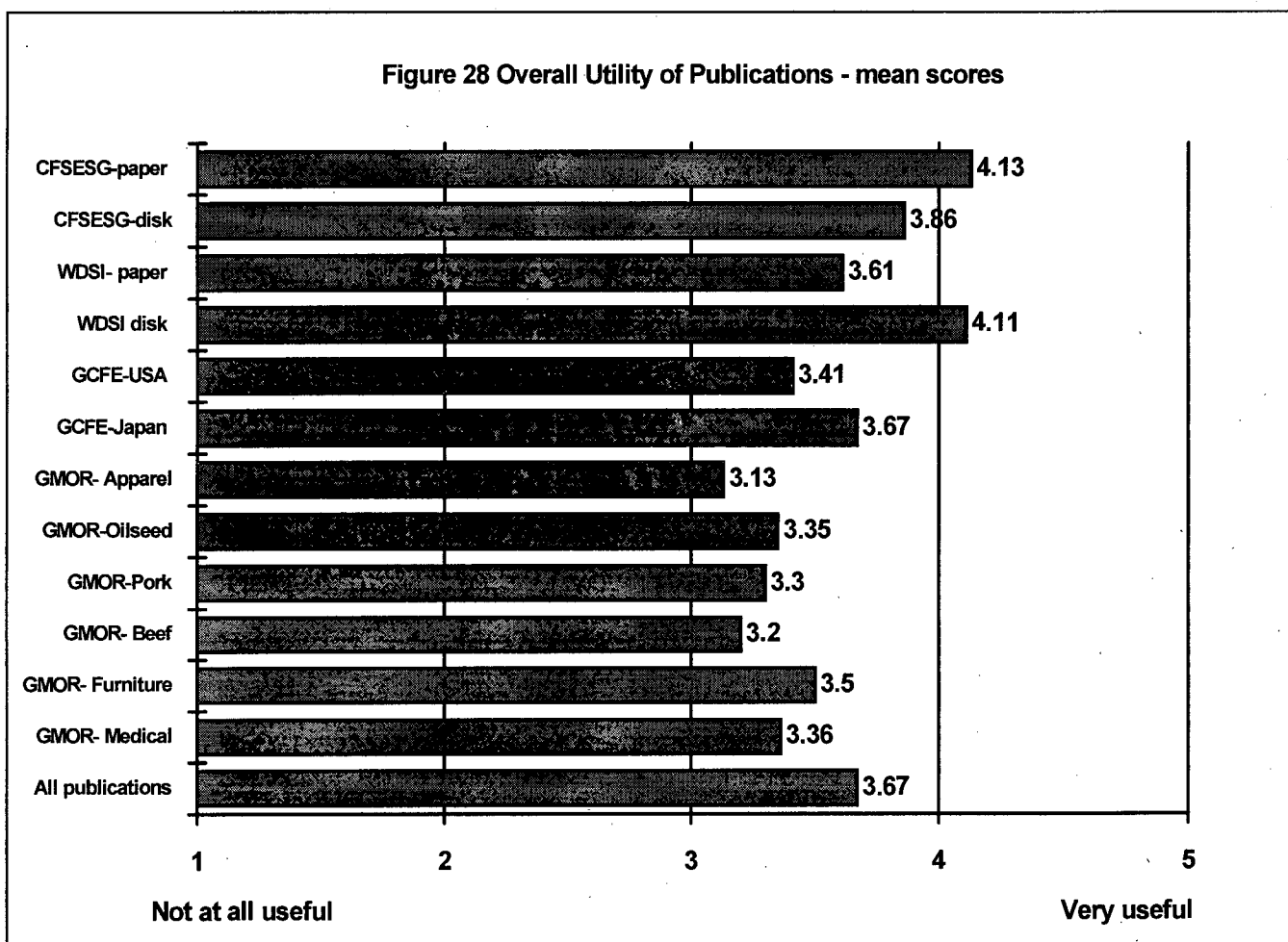
Respondents were asked to assess each publication in terms of its overall value as an information tool. As shown in Figure 27, publications were ranked highly in terms of their overall usefulness. More than 60% of the time, publications were ranked either "4" or "5" on a scale of 1 to 5 where 1 meant "not at all useful" and 5 meant "very useful".



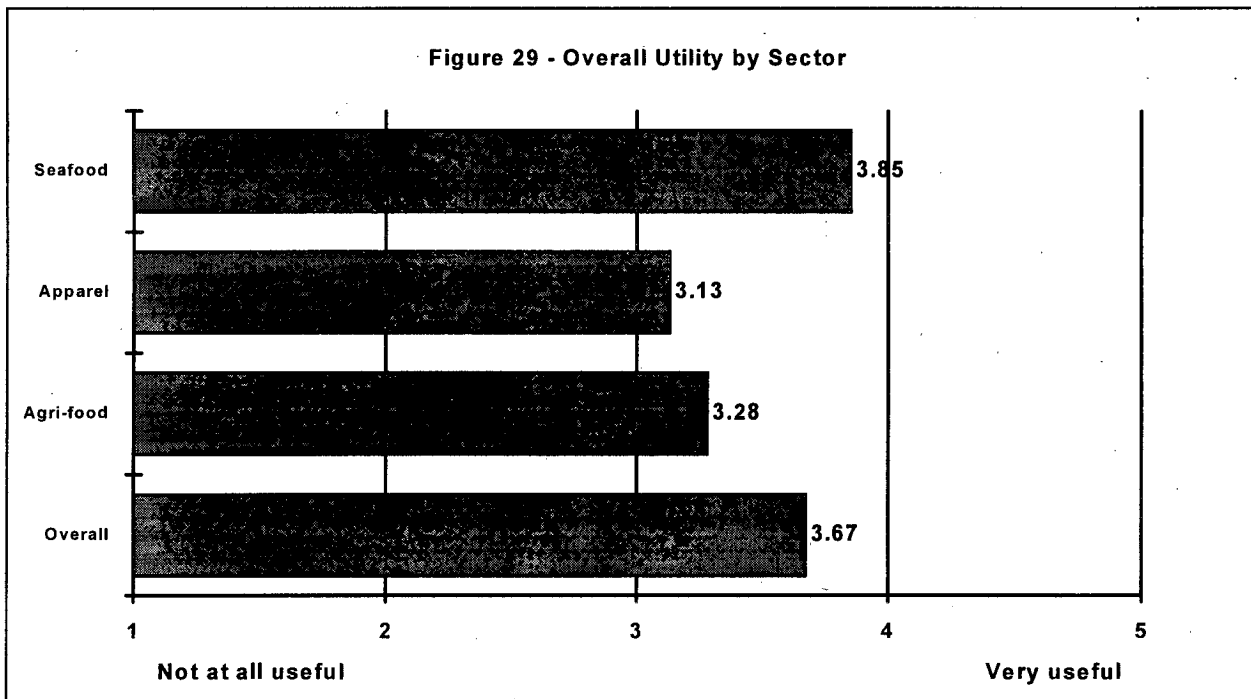
As shown in Figure 28, the Canadian Fish and Seafood Exporters Sourcing Guide received the highest mean utility score at 4.13 out of a possible 5.0. GMOR - Apparel had the lowest score at 3.05. The mean score for all publications was 3.67 (Readers should note that the small sample sizes for the Global Market Opportunities Reviews for Pork, Beef, Contract Furniture and Medical Devices mean that comparisons with other publications should be made with caution).

Publications which focus on providing directories or contact lists tended to receive higher utility ratings than those publications providing market analyses. As a group, the mean score for directory or list publications was 3.85, while those publications with a greater

analytical focus were rated on average at 3.24. Again, this corresponds with previous qualitative research on export publications which suggests that information that can be used to generate sales is of higher utility to clients.



As shown in Figure 29, respondents from the seafood sector tended to rate overall utility higher than those respondents from apparel or agri-food sectors (sample size did not permit analysis for furniture or medical devices sectors).



Analysis of profiling variables revealed that the following segments were likely to give *higher* utility ratings to the publications:

- organizations involved in distribution and wholesale
- businesses with revenues of under \$500,000 or between \$1 million and \$5 million;
- businesses which derive less than half their revenues from exporting; and
- organizations with fewer than 100 employees.

On the other hand, the following segments were *less likely to rate overall utility highly*:

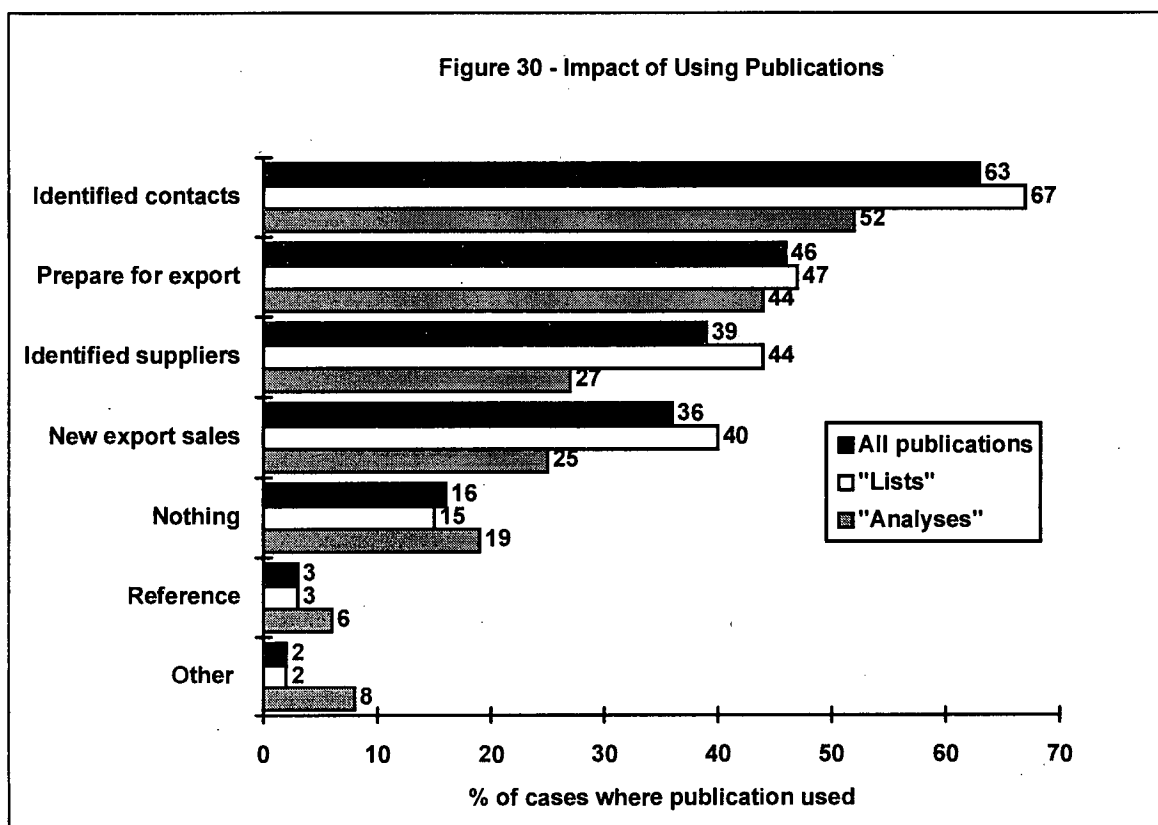
- businesses involved in secondary processing;
- companies with more than \$10 million in annual revenues; and
- organizations with more than 100 employees.

These findings also confirm those of previous qualitative research conducted by the Department, which shows that large organizations tend to utilize internal resources to obtain information and, for the most part, are established in export markets.

5.2 Impact

Departmental publications had a significant, direct and positive impact on the activities of those who used them. Overall, respondents identified on average two direct impacts, typically including identifying new contacts for exporting, undertaking activities or making preparations to export, identifying suppliers of goods and services, and generating new export sales.

As shown in Figure 30, departmental publications also proved to be highly effective in helping users generate export sales: **in 36% of the cases where a respondent used a particular publication, new sales in export markets were generated as a direct result of this usage.** Additionally, in almost half of the cases, respondents said they undertook activities or made preparations to export.



Those publications which focus on providing directories or lists tended to have a greater impact in generating export sales or causing respondents to undertake activities or preparations for export. In 40% of the cases where "list" or directory publications were used, new export sales were generated as a direct result. This occurred in only 25% of the cases for analytical publications. No significant difference was found between list publications and analyses when it came to making preparations for export.

Table 4 - Impact of Publications

Impact of publication	% of cases where publication used	% of all cases
Identified contacts	63%	18%
Prepare for exports	46%	13%
Identified suppliers	39%	11%
New export market sales	36%	10%
Nothing	16%	73%*
Reference	3%	1%
Other	2%	<1%

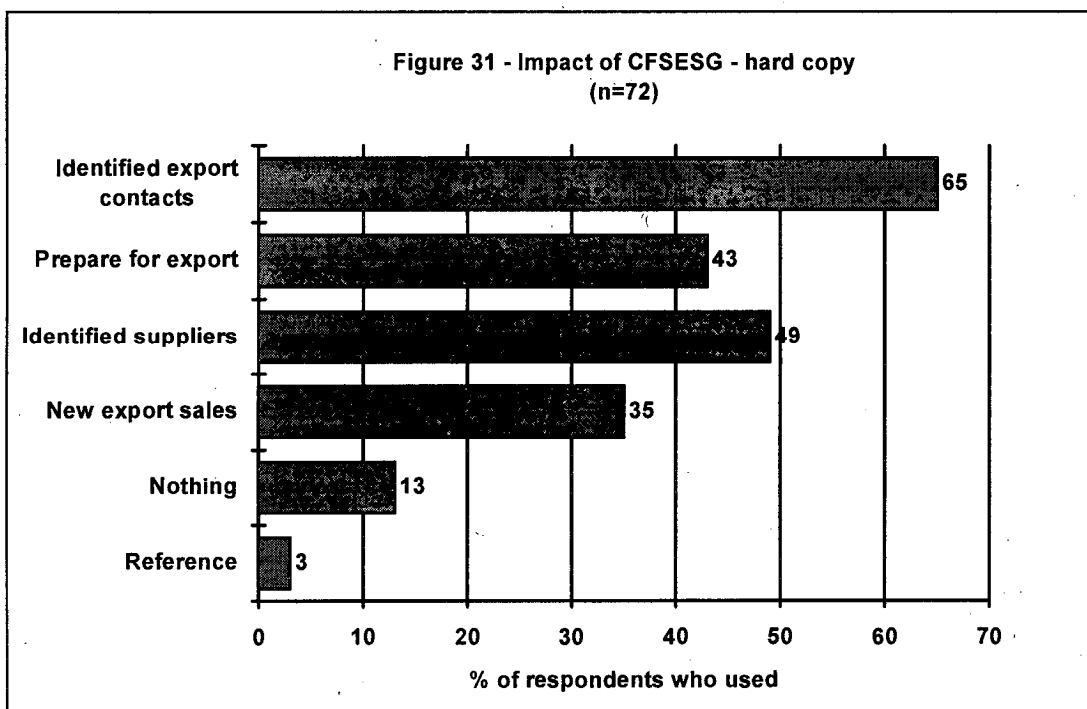
* Assumes that if the publication was not used, no impact occurred.

Of particular note is the apparent effect of Departmental publications in helping create new exporters. Based on the survey responses from those companies with no export sales in the previous year, use of Departmental publications generated new export sales 10% of the time. In addition, use of the publications caused non-exporting firms to undertake new activities or prepare for export 22% of the time.

Table 4, *opposite*, compares the impact of departmental publications on those who used the documents and the entire base of intended recipients. The differences in results underline the importance of targeting distribution to those who are likely to use the publications. It should be noted that where the respondent did not use the publication, it was assumed that no impact on the company occurred. This, however, is not necessarily the case: in those instances (12% overall) where respondents did not use the document but circulated them to others within their organization, positive impacts may have occurred. Determining those secondary impacts, however, was outside the scope of this study.

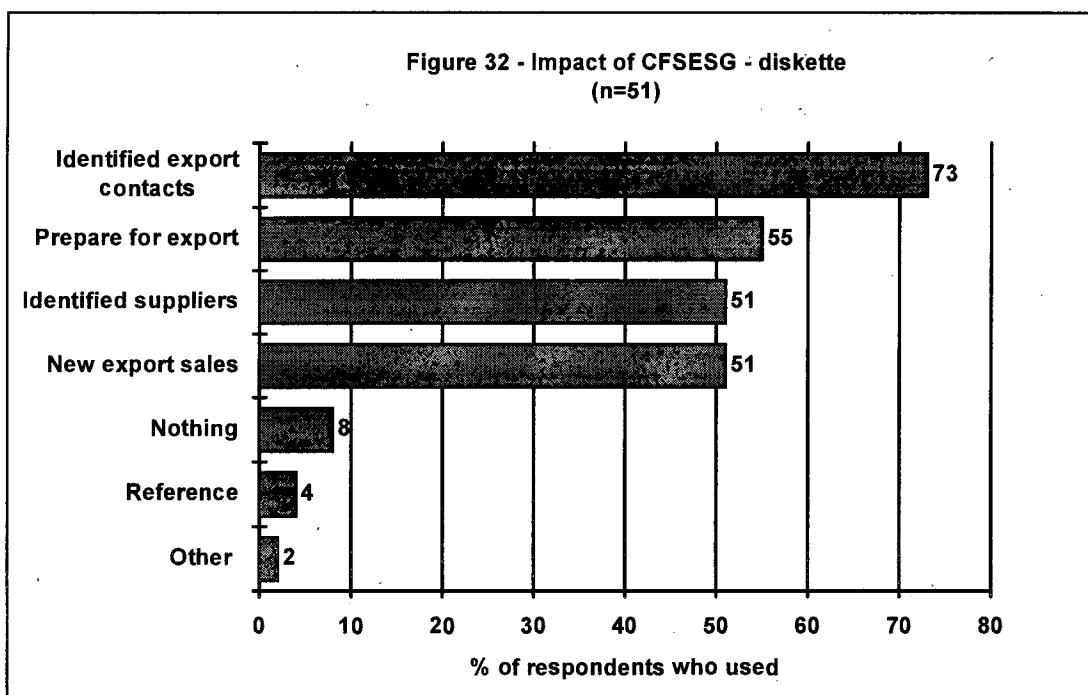
5.2.1 Canadian Fish and Seafood Exporters Sourcing Guide - Hardcopy

As shown in Figure 31 below, respondents were likely to identify new contacts for export market development or suppliers of goods and services as a result of reading the hardcopy version of the Canadian Fish and Seafood Exporters Sourcing Guide. More than one-third of respondents who used the publication said it resulted in new export sales.



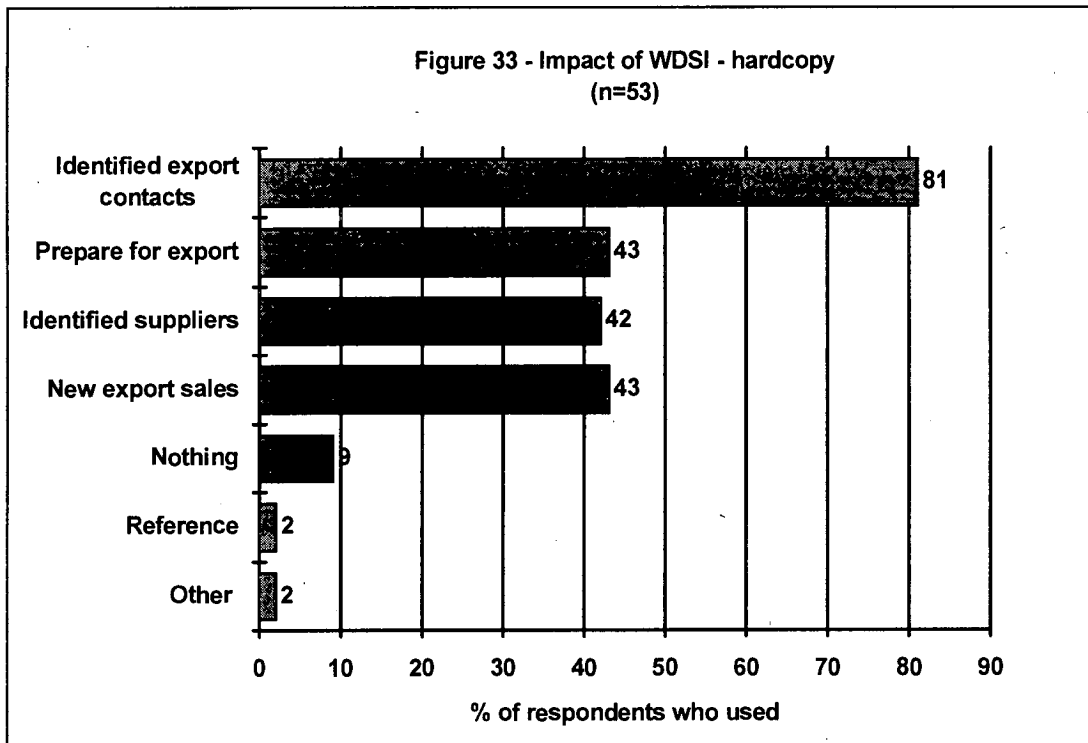
5.2.2 Canadian Fish and Seafood Exporters Sourcing Guide - Diskette

As shown in Figure 32, almost three-quarters of respondents reported that using the document resulted in identifying new contacts for export market development. More than half of those who used it reported new export sales and preparations for export.



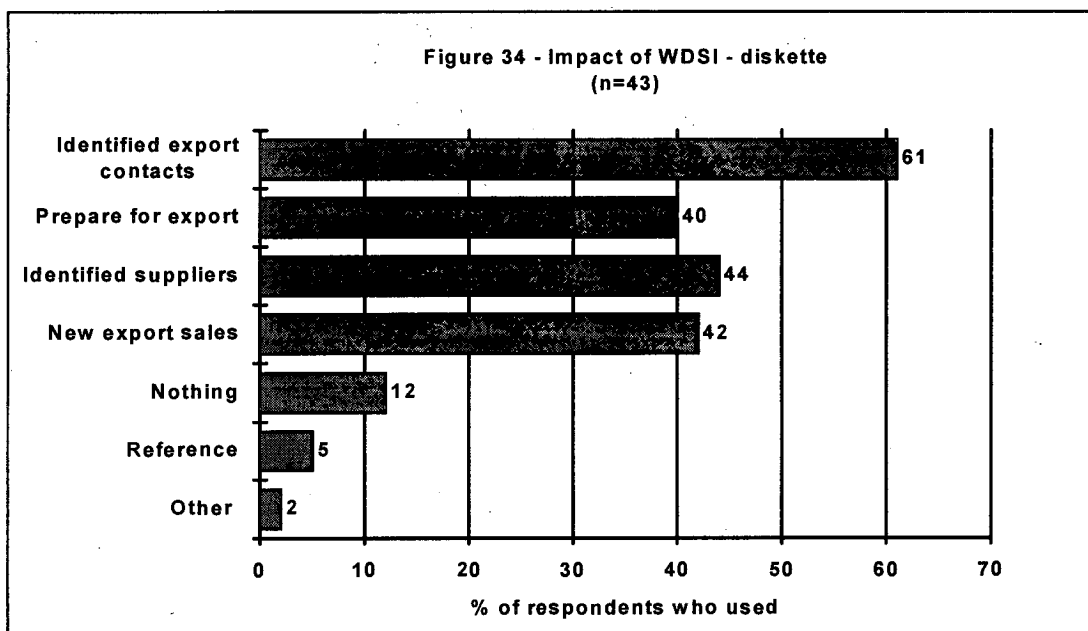
5.2.3 World Directory of Seafood Importers - Hardcopy

As shown in Figure 33, more than 80% of users said they identified contacts for export market development as a result of using WDSI. In addition, more than 40% said they generated new export sales.



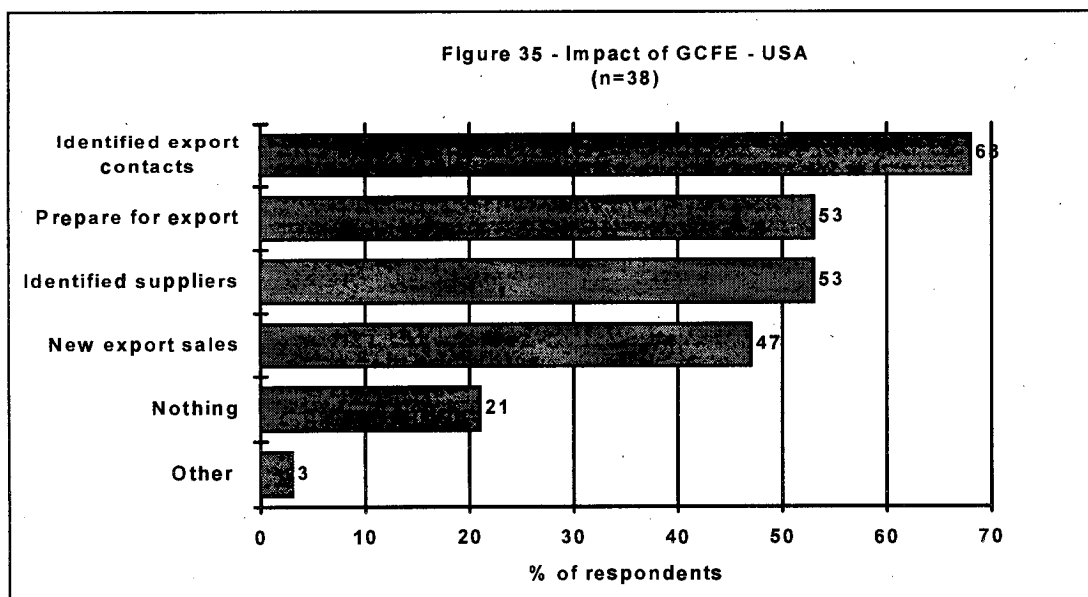
5.2.4 World Directory of Seafood Importers - Diskette

Figure 34 shows the reported effects of using the diskette version of the World Directory of Seafood Importers.



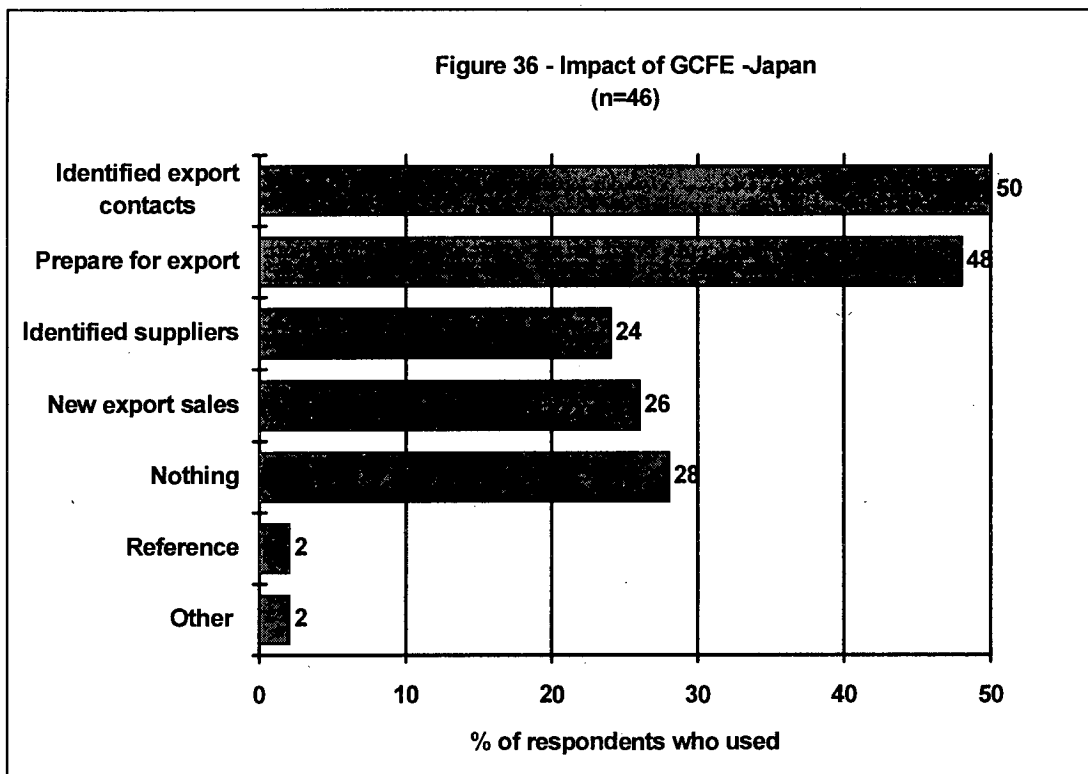
5.2.5 Guidelines for Canadian Fish Exporters - USA

As a result of using Guidelines for Canadian Fish Exporters - USA, 68% of respondents said they identified contacts for export market development. Almost half of the respondents, meanwhile, reported generating new export sales (see Figure 36)



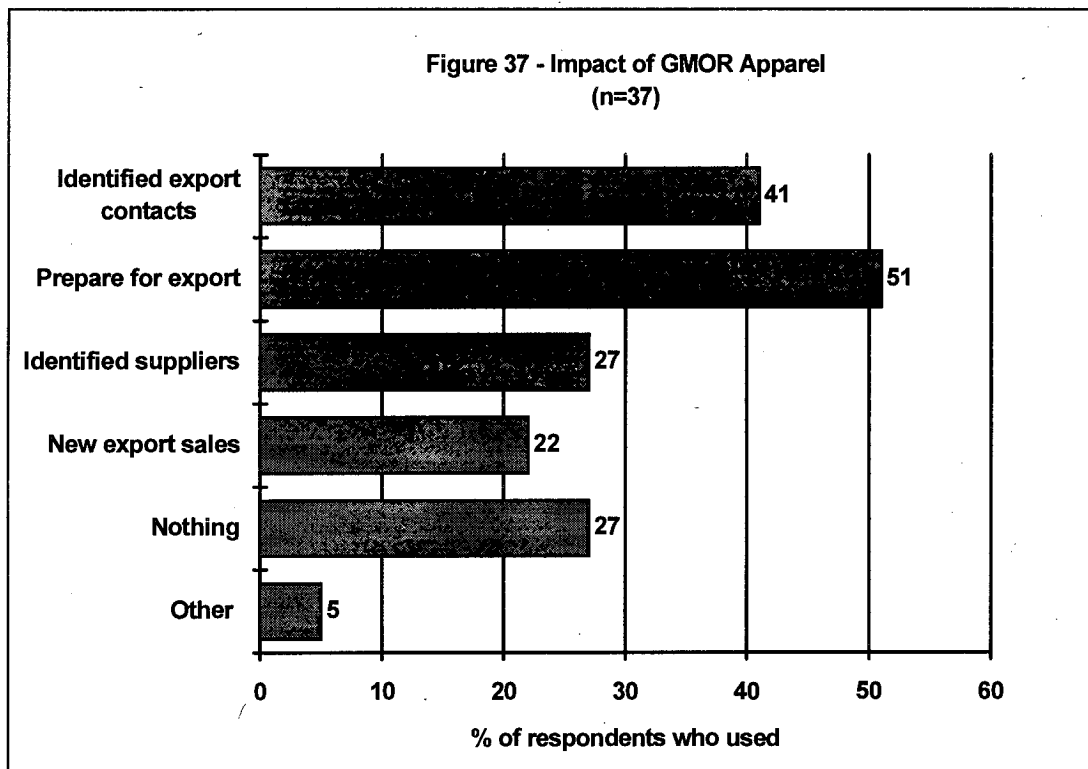
5.2.6 Guidelines for Canadian Fish Exporters - Japan

As shown in Figure 36, half of those respondents who use Guidelines for Canadian Fish Exporters- Japan identified contacts for export market development. While 26% said using the publication resulted in new export sales, 28% reported no direct impact.



5.2.7 Global Market Opportunities Review - Apparel

As shown in Figure 37, more than half of those respondents who used the Global Market Opportunities Review - Apparel said they undertook new activities or made preparations for export. Another 22% said they generated new export sales.



5.2.8 Global Market Opportunities Review - Oilseed

As shown in Figure 38, 25% of respondents said that using Global Market Opportunities Review - Oilseed resulted in new export market sales. More than half said they identified contacts for export market development.

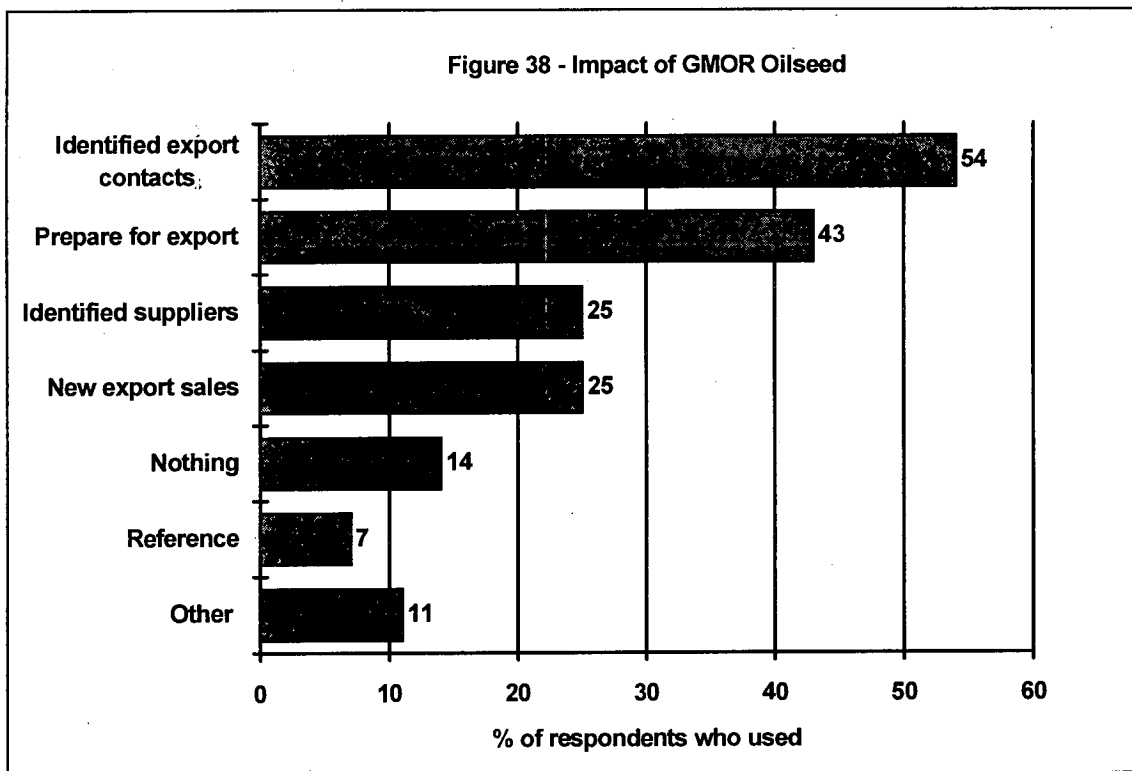


Table 5 - Willingness to Pay for Departmental Publications

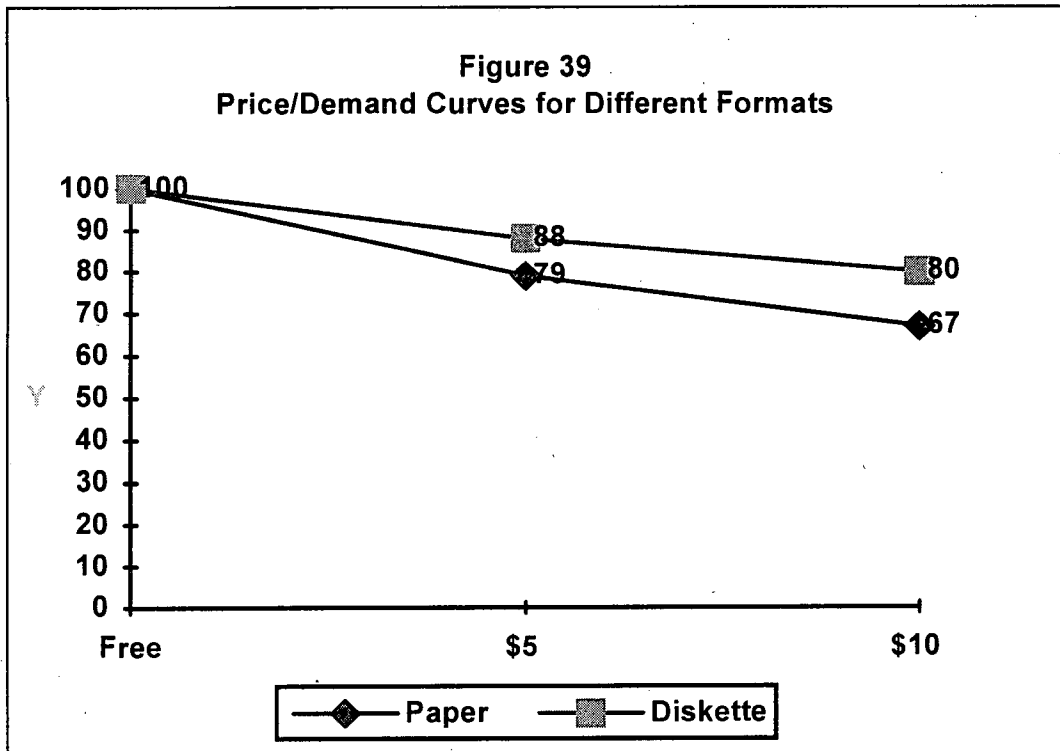
Publication	Demand @\$10 (% of those who use)	Demand @ \$5 (% of those who use)
1. Canadian Fish and Seafood Exporters Sourcing Guide - hardcopy	69%	81%
2. Canadian Fish and Seafood Exporters Sourcing Guide - diskette	80%	90%
3. World Directory of Seafood Importers - hardcopy	75%	85%
4. World Directory of Seafood Importers - diskette	80%	86%
5. Guidelines for Canadian Fish Exporters - USA	69%	83%
6. Guidelines for Canadian Fish Exporters - Japan	63%	79%
7. GMOR for Apparel	54%	78%
8. GMOR for Oilseed	75%	84%
9. GMOR for Pork	69%	69%
10. GMOR for Beef	60%	73%
11. GMOR for Contract Furniture	33%	33%
12. GMOR for Medical Devices	62%	77%
Overall	70%	81%

6.0 Willingness to Pay

In the vast majority of instances, respondents would be willing to pay for the publications distributed by the Department. Overall, respondents who use the Departmental publications would buy them 81% of the time. In 70% of the cases, respondents would be willing to pay \$10 while in 81% of the cases, respondents would pay \$5. These results suggest that if the Department wishes to maximize revenue, the publications should be priced at \$10. However, if the department wants to maximize distribution while recovering some costs, the publications should be priced at \$5.

To the extent that willingness to pay is a measure of value, the results correspond with the high overall utility ratings and the impacts of using the publications reported by respondents. Not surprisingly, willingness to pay was greatest where a publication resulted in new export sales (96%). Nevertheless, in those instances where publications did not result in any observed impact, respondents would pay in nearly two-thirds (66%) of cases. This suggests that charging for the publications would have no significant negative impact on the generation of new export sales by Canadian firms.

As shown in Table 5, *opposite*, respondents were most likely to pay for Canadian Fish and Seafood Exporters Sourcing Guide (diskette) and the World Directory of Seafood Importers (diskette). However, only one-third of respondents were willing to pay for Global Market Opportunities Review Furniture. Respondents were more likely to pay \$10 for diskette publications. This may suggest that respondents value the capabilities inherent in electronic formats (e.g. easy creation of electronic mailing lists, simple manipulation, etc.). Figure 39, below, shows the different price/demand curves for hardcopy and diskette publications.



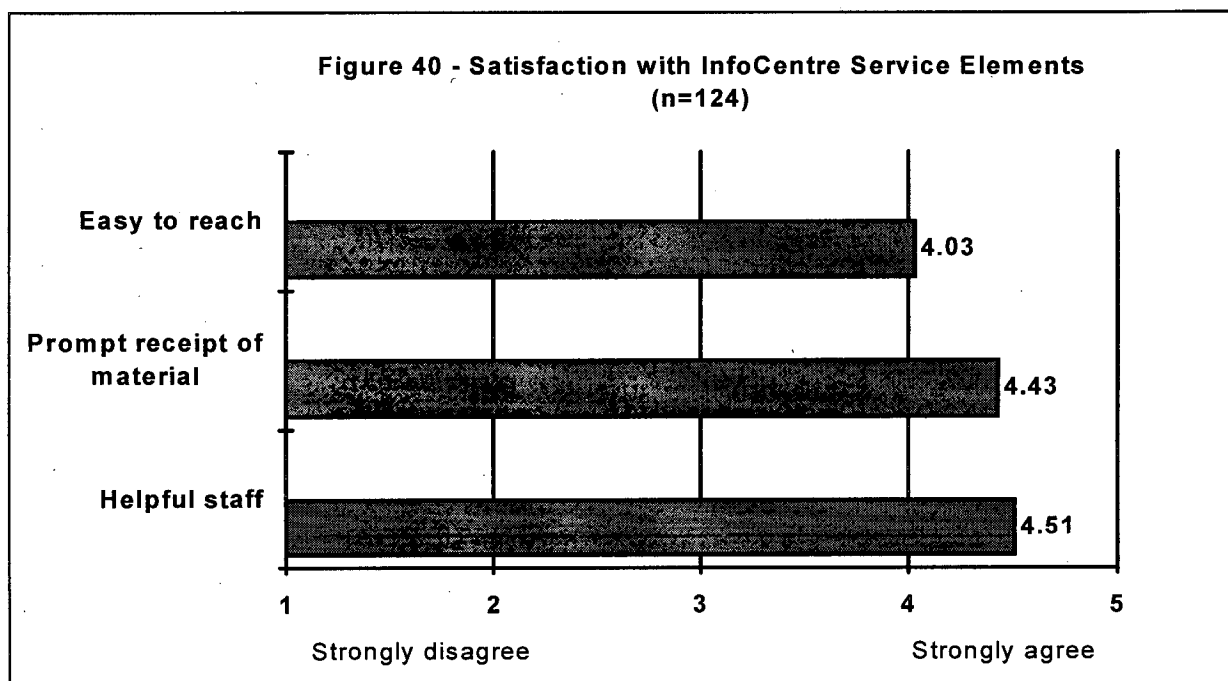
7.0 InfoCentre Services

7.1 InfoCentre

Those clients who contacted the InfoCentre (43%) indicated a very high level of overall satisfaction with the service. Based on the survey results:

- the mean ranking for overall satisfaction with InfoCentre service was 4.44 on a scale of 1 to 5 where 1 meant "very dissatisfied" and 5 meant "very satisfied";
- 57% of respondents said they were "very satisfied"; and
- only 1% of respondents indicated they were very dissatisfied with Info Centre service.

Compared with surveys we have conducted for other organizations, **these results show a very high level of overall satisfaction.** As shown in Figure 40, respondents also indicated a high degree of satisfaction with individual service elements, especially the helpfulness of InfoCentre staff.



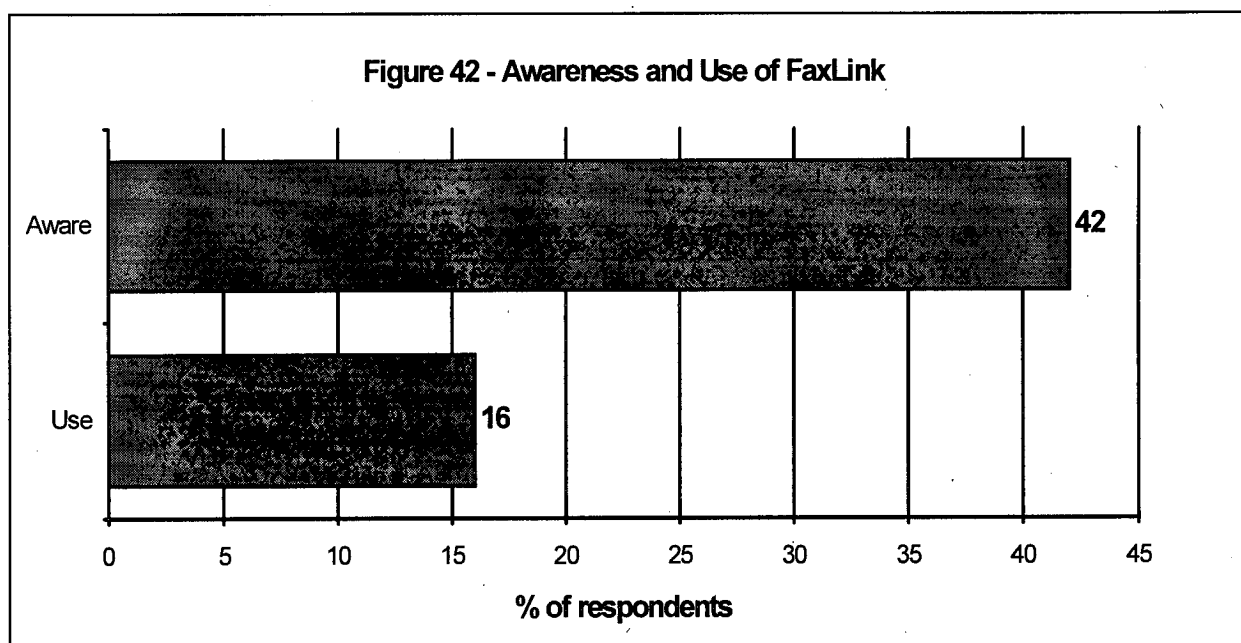
Correlation analysis of service elements with overall satisfaction revealed that the helpfulness of the staff had the greatest impact on overall satisfaction. This was followed by prompt delivery of documents and ease in reaching the right contact person. However, it should be kept in mind that other elements such as the utility and impact of individual publications may also have an impact on overall satisfaction.

7.2 FaxLink

Fewer than half of the respondents (42%) were aware of the FaxLink service. While 16% said they had used the service in the past (see Figure 42)⁴, thirty per cent of those respondents who did not use the service were aware of its existence. This group tended not to use the service because:

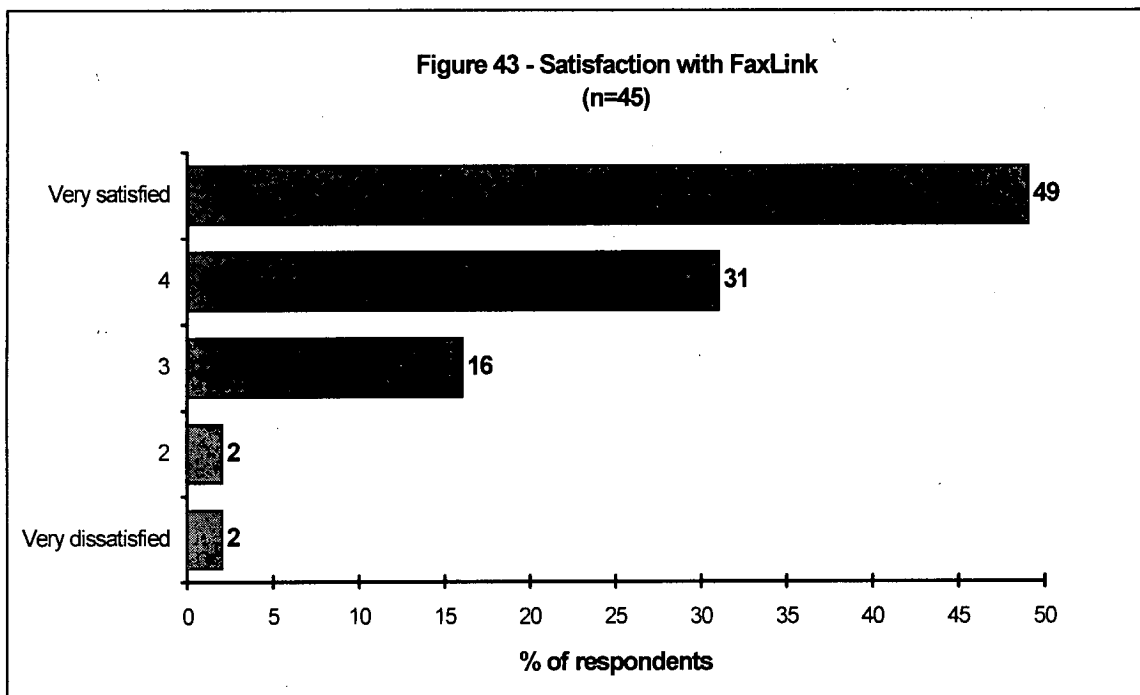
- the information did not meet their needs (27% of respondents);
- they had not yet had the chance to use it (27% of respondents); or
- they preferred alternative delivery media. (17%)

Only 6% said they did not use FaxLink because they preferred personal contact. Again, those respondents who had participated in programs sponsored by Foreign Affairs or Agriculture Canada had higher levels of awareness and usage.



More than half of those who had used FaxLink said they were "very satisfied" with the service. As shown in Figure 43, levels of dissatisfaction were low (3%). The most common cause of dissatisfaction was difficulty in getting an open line.

⁴ This figure corresponds closely to the 15% who listed fax-back as their preferred format (see Section 4.1.2).



8.0 Conclusions and Recommendations

This chapter presents key conclusions and recommendations based on the results of the survey.

8.1 Reception and Usage

Overall, recall and usage rates indicate that distribution of Departmental publications could be better targeted to ensure a greater likelihood that those who receive publications use them.

Neither InfoCentre nor targeted distribution appeared to be more effective in delivering publications to clients who use them. Results from the survey indicate that smaller businesses (under \$5 million in revenues) with some export activities should be a focus of distribution activities.

8.2 Content, Format and Delivery Media

Departmental publications are well-received with respect to content and format. Overall, format elements such as lay-out, organization, appearance and writing were rated more favourably than the importance of the information. Analysis of survey results and previous qualitative research suggests that information which provides sales leads, distributor contacts and competitive intelligence is more likely to be considered essential. As a result, the Department should ensure that its publications provide as complete, accurate and up-to-date contacts as possible.

Respondents indicated preferences for more than one delivery vehicle, most frequently mentioning hard copy and electronic diskettes as preferred media. This corresponds with the usage patterns whereby publications are used for several purposes. While hard copy publications lend themselves to use as reference tools, the capabilities of electronic formats allow contact lists to be sorted for mailing lists. Therefore, the Department may consider making publications available in both paper and electronic diskette versions. As many recipients who received diskette publications indicated compatibility problems, the Department should consider pursuing this to determine the technical nature of this problem.

8.3 Utility and Impact

Departmental publications are rated highly in terms of their overall utility as information tools. Overall, end-users find those publications which focus on providing contact and sales lead information more useful than those publications which provide in-depth analyses of export markets and background information. Because small and medium-

sized business tended to rate the overall utility highly, this suggests a greater impact on this sector.

Departmental publications are having a significant and positive effect on the export activities of end-users. In 36% of cases where publications were used (10% of intended recipients), respondents indicated that their organizations' generated new export sales as a direct result of using Departmental publications. The survey results indicate that a greater focus on publications which provide sales leads, directories and contact lists may boost export sales activities.

8.4 Willingness to Pay

Most users of Departmental publications would be willing to pay to receive them. Overall, end-users would pay \$5 for publications in 82% of the cases. Respondents would pay \$10 for publications 70% of the time. Interestingly, in the majority of cases (66%), respondents would pay for publications even when no impact was observed. The research also suggests that users are more willing to pay \$10 for diskette publications than for paper publications.

8.5 InfoCentre Service Delivery

Respondents were very satisfied with the service provided by the InfoCentre and staff should take pride in their accomplishments.

8.6 Marketing

The results of the research suggest that the Department may want to consider a publications marketing strategy with the following objectives:

- to increase usage of publications among the recipient base;
- to rationalize distribution to minimize the incidence of non-use; and
- to encourage the adoption of electronic products.

8.6.1 Strategies to Increase Usage

The survey found that the major reasons for not using publications were: lack of relevance to the business (39% of responses); dissatisfaction with the information contents of the publication (17%); and lack of time (15%). To address these concerns, the Department should consider the following approaches:

1. Address distribution issues (see section 8.6.2);
2. Focus product development activities on those areas that users feel have a higher utility. Results of this and previous studies suggest that the priority for businesses is

contact information such as sales leads, distributor names and partnership opportunities that can be used to generate income directly. Competitive information is also seen as valuable. Previous research also suggests that product development should concentrate on the needs of small businesses, as larger corporations tend to have the internal resources and the desire to fulfill their own information requirements.

3. Actively promote the benefits of using Departmental publications. Concrete evidence of the benefits of using export market development publications (such as those found in this study) should be provided to potential users. This may reduce the incidence of non-use as a result of "lack of time".

8.6.2 Rationalized Distribution

While Departmental publications have a significant and positive impact on those who use them, not all of the intended recipients do so. The survey findings suggest distribution could be better targeted to certain companies and individuals within companies.

One approach to rationalize distribution would be to price Departmental publications⁵. As more than 80% of respondents who used publications said they would be willing to pay \$5 for them, nominal charges might discourage recipients from asking for "one of everything" and focusing their requests on what they are likely to use. In addition, as virtually all (96%) respondents who reported new export sales as a result of using the publications would be willing to pay, instituting charges would likely have no significant negative impact on the generation of new export sales by Canadian companies. Any pricing strategy should be accompanied by promotional efforts that make potential users aware of Departmental publications and their benefits.

To focus distribution more effectively on appropriate individuals within companies, the Department needs to understand how publications are circulated within target organizations. The study found that almost one-third of those who receive but do not use publications circulate them to others within their organization. While administrators/office managers and executives/owners are more likely to do this than other occupations, knowledge of *who* these publications are circulated to was beyond the scope of this survey.

8.6.3 Migration to Electronic Products

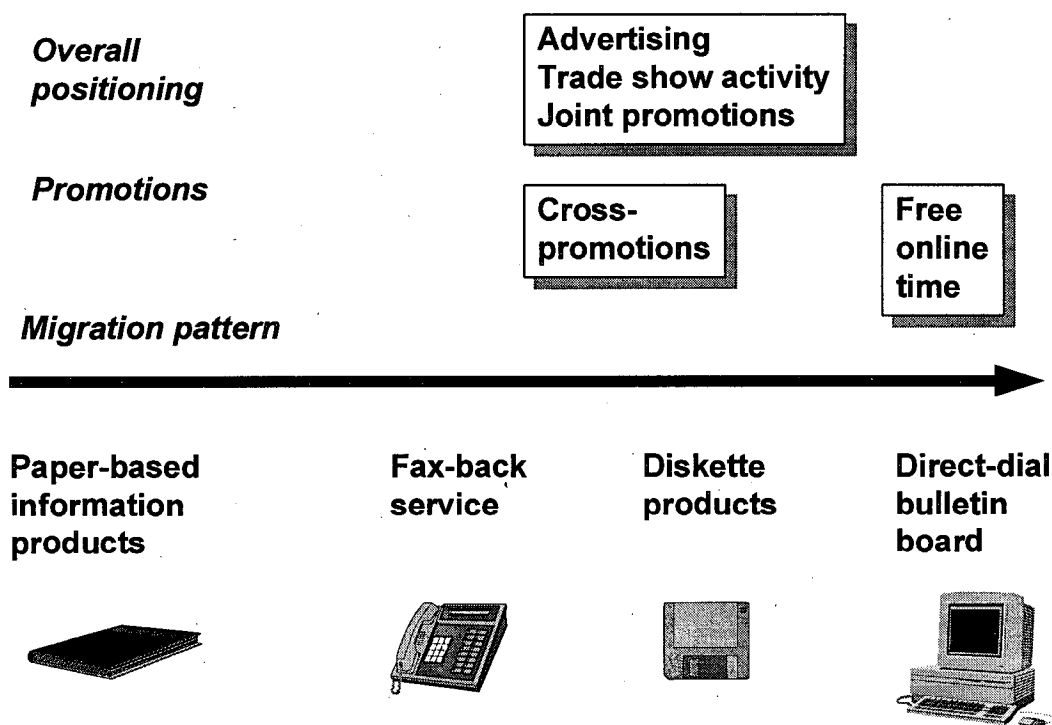
While the survey findings indicated that most publication users want to receive the information in a variety of media, the Department may wish to consider a product migration strategy that encourages the use of electronic products as opposed to paper media. The benefit of such a strategy would likely be savings in distribution costs, as the

⁵ This approach to pricing is presented as a distribution strategy, rather than a revenue strategy.

marginal costs of dissemination tend to be lower for electronic products generally, and BBS or on-line services in particular, than for paper publications.

The challenge for the Department is to develop and implement a strategy that will encourage migration to lower-cost dissemination media. As shown in Exhibit 2 below, the intent of such a strategy would be to convince as many users of paper-based products to move to electronic products. Because facsimiles and diskettes are more familiar to most than on-line BBS, these are considered intermediary products in the model; the underlying assumption is that it is easier to encourage users to move along a path where the next dissemination medium is somewhat familiar. As users become accustomed to receiving and using information in electronic form, it should be easier to encourage adoption to on-line dissemination media. (However, the history of emerging media suggests that demand for traditional media will persist: the challenge is to minimize it).

Exhibit 2 Migration to Electronic Products



Such a migration strategy could involve the following communication and promotional initiatives:

- Advertising, trade show activities, and joint promotions with other providers (e.g. associations, other government organizations) to position the Department as a source for electronic products and services;

- Cross-promotions to encourage users of paper-based products to adopt electronic products; and
- Incentives, such as higher prices for paper products than diskette versions and free on-line time, to encourage trial of electronic products.

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Appendix A
Survey Questionnaire

**Foreign Affairs and International Trade Canada
InfoCentre Survey**

Final Questionnaire (March 8, 1995)

Note to programmer: All revisions shown in italics

Section A: Introduction

Could I please speak to (name on list)?

- Yes, now ----> **continue**
- not available call back

Hello, my name is _____ and I'm calling on behalf of the Department of Foreign Affairs and International Trade, formerly the Department of External Affairs. We're conducting a survey of people who have received publications from the Department. The survey takes about 10 minutes to complete and the results will be used by the Department to help better serve you as a client. Your answers will remain anonymous.

1. Would you be willing to participate in the survey?

- Yes, now ----> **continue**
- Yes, call back ----> **specify date and time**

Date _____ Time ___:___ a.m. or ___:___ p.m.

- Refused ----> **Thank and terminate (track type of organization and sector on database)**

2. Would you prefer to be interviewed in English or French?

- French
- English

Switch to language of preference.

Section B: Recall

3. Do you recall receiving the following publication(s)?

**Choose (from database) only those publications that were sent to the respondent.
Prompt with description of cover if necessary.**

- | | Yes | No | |
|------|--------------------------|--------------------------|---|
| 3.1 | <input type="checkbox"/> | <input type="checkbox"/> | the Canadian Fish and Seafood Exporters Sourcing Guide -
hardcopy version (white cover with pictures of seafood) |
| 3.2 | <input type="checkbox"/> | <input type="checkbox"/> | the Canadian Fish and Seafood Exporters Sourcing Guide on
diskette |
| 3.3 | <input type="checkbox"/> | <input type="checkbox"/> | the World Directory of Seafood Importers - hardcopy version
(white cover with graphics of fish, lobster) |
| 3.4 | <input type="checkbox"/> | <input type="checkbox"/> | the World Directory of Seafood Importers on diskette |
| 3.5 | <input type="checkbox"/> | <input type="checkbox"/> | Guidelines for Canadian Fish Exporters - USA (blue cover) |
| 3.6 | <input type="checkbox"/> | <input type="checkbox"/> | Guidelines for Canadian Fish Exporters - Japan (blue cover) |
| 3.7 | <input type="checkbox"/> | <input type="checkbox"/> | Global Market Opportunities Review for Apparel (green cover) |
| 3.8 | <input type="checkbox"/> | <input type="checkbox"/> | Global Market Opportunities Review for Oilséed (green cover) |
| 3.9 | <input type="checkbox"/> | <input type="checkbox"/> | Global Market Opportunities Review for Pork (green cover) |
| 3.10 | <input type="checkbox"/> | <input type="checkbox"/> | Global Market Opportunities Review for Beef (green cover) |
| 3.11 | <input type="checkbox"/> | <input type="checkbox"/> | Global Market Opportunities Review for Contract Furniture (green
cover) |
| 3.12 | <input type="checkbox"/> | <input type="checkbox"/> | Global Maket Opportunities Review for Medical Devices
(green cover) |

Go to Q. 6 if yes to any

4. Would someone else in your organization have received any of these publications on your behalf?

Don't know -----> **Go to Section H**

No -----> **Go to Section H**

Yes -----> **Continue**

5. Who would that be?

Name: _____

Title: _____

Telephone: _____

Thank and terminate.

Section C: Usage and Behaviour

Ask for all documents recalled under Q.3a

6.a) What do you use the (document) for?

Do not read. Select all that apply. Describe under "other" if unsure.

I don't use it and could do without it

I receive it primarily as a reference tool for use by others (e.g. a library)

I use it to support decisions about export market development

I use it for research purposes

I use it to support policy decisions

I use it primarily for the contact lists

I read or look at it out of general interest only

other -----> **specify** _____

6.b) Could you explain why you don't use this document?

Ask for all documents not used (Q.6a).

Do not read. Select all that apply.

- don't have the time, but the subject matter is of interest
- the subject matter is not directly relevant to your job or role
- the subject matter is of interest, but you haven't found any useful information in past editions
- the lists are inaccurate/not up-to-date
- other -----> specify _____

7. Do you usually circulate the document or copies of specific sections to other people within your organization?

- No -----> *Go to Q.9*
- Yes

8. To how many other people do you circulate it?

Go to Section H if don't use any documents

Randomly select maximum of 3 documents used (Q.6a)

9. Do you retain a copy of the (document) for ongoing reference?

- Yes
- No

10. As a direct result of reading or using the document, did your *organization*...

Select all that apply.

- generate new sales in export markets
 - undertake new activities or make preparations to export
 - identify *contacts* for export market development
 - identify suppliers of goods or services that your organization purchases
 - other -----> **Specify** _____,
- or**
- not applicable (not-for-profit organization)*
 - nothing (Do not read)*

Section D: Evaluation of Contents and Format

Repeat for up to three of the publications used

11. Using a scale of 1 to 5 where 1 means strongly disagree and 5 means strongly agree, to what extent do you agree or disagree with the following statements about the (document).

Strongly disagree					Strongly agree	
1	2	3	4	5	D/K	

- a) the information in the (document) is essential for me to have
 - b) the overall appearance and layout is appropriate - **hardcopy only**
 - c) the document is well organized
 - d) the writing is easy to understand
 - e) *the document is an appropriate length (i.e. number of pages)*
 - f) the document is an appropriate size (8.5" x 11) - **hardcopy only**
12. Again using a scale of one to five, where 1 means not at all useful and 5 means very useful, how useful did you find the (document) as an overall information tool?

Rotate scale.

Not at all useful					Very useful
1	2	3	4	5	

13. Are there any additions, changes or improvements you would make to the format or contents of the (document)?

None, or

-
14. a) *Given the choice, would you prefer to receive the information in the (document)...*

Select all that apply

- in hardcopy format ----> Go to Q.15*
- by interactive fax*
- in electronic format*

14.b) Which one of the following electronic formats would you prefer?

- diskette
 CD ROM
 via the Internet
 through a direct-dial bulletin board service

Section F: Willingness to Pay

15. Assume for a minute that the Department was forced to make the documents available for their cost of production.

*If you were charged \$10 for a copy of the (document), would you still want to receive it?
 What if the price were \$5, would you still want to receive it?*

- | | | | | |
|----|------|--------------------------|--------------------------|----------------------|
| | | Yes | No | |
| a) | \$10 | <input type="checkbox"/> | <input type="checkbox"/> | → If yes, Go to Q.16 |
| b) | \$5 | <input type="checkbox"/> | <input type="checkbox"/> | |

Section G: Service Delivery

Ask questions in this section once

16. To order the document(s), did you contact the InfoCentre at the Department of Foreign Affairs and International Trade?

- No -----> Go to Q.19
 D/K -----> Go to Q.19
 Yes -----> Continue

17. In terms of the service provided when you contacted the Department's InfoCentre, to what extent do you agree or disagree with the following statements. Again, use a scale of 1 to 5 where 1 means strongly disagree and 5 means strongly agree.

Strongly disagree

1

2

3

4

Strongly agree

5

D/K

- a) The person I talked to was helpful
 b) I received the material promptly
 c) It was easy to reach the right contact person by phone

18. *On a scale of one to five where one means that you were very dissatisfied and 5 means that you were very satisfied, to what extent were you satisfied with the overall service provided by the InfoCentre?*

Very dissatisfied					Very satisfied
1	2	3	4	5	

19. *Have you used the Department's interactive fax service, known as FaxLink?*

Yes -----> **Go to Q.22**

No

20. Were you aware of this service?

No -----> **Go to Q.24**

Yes

21. Why have you not used FaxLink?

Do not read. Select all that apply

the information available through the service doesn't meet my needs

I don't have access to a fax machine

I'm interested in the service, but haven't had the chance to use it

prefer another format

prefer personal contact

other -----> **specify** _____

Go to Q.24

22. On a scale of one to five where one means that you were very dissatisfied and 5 means that you were very satisfied, to what extent were you satisfied the FaxLink service?

Very dissatisfied					Very satisfied
1	2	3	4	5	

Go to Q.24 if satisfied

23. Why were you dissatisfied?

Do not read. Select all that apply

the information available through the service doesn't meet my needs

slow speed of information transfer

the information is out of date

I experienced technical problems

- it's hard to get through (e.g. line busy)*
 poor document quality
 high long-distance charges
 other -----> specify _____

Section H: Respondent Profile

I'd like to end the interview by obtaining some descriptive information on you and your organization. This information will remain confidential.

24. What is your title or function?

Do not read

- Director/Manager-----> specify area _____
 EA/Assistant
 Professor/Researcher
 Student
 Executive (CEO/President/Vice-President/Owner)
 Other-----> specify _____

25. What kind of organization do you work for?

Do not read. Prompt if necessary.

- Private company
 Association
 University/educational organization
 Other _____

Go to Q.29 if association/academic

26. Record nature of business.

Note to interviewers: Prompt if necessary. "Is this..."

If unsure, specify under other

- a primary resource or production business
 a secondary processing business
 a distribution, wholesale or retail business
 a service business
 other -----> specify _____

27. Which of the following categories describes your firm's total revenues for the last year?

Note that this information will remain confidential

- under \$100,000
 \$100,000 to \$499,999
 \$500,000 to \$999,999
 \$1M to \$4,999,999
 \$5M to \$9,999,999
 \$10M plus

28. What percentage of your company's total revenues came from export market sales? **Probe for best estimate**

_____ %

29. In total, how many people does your organization employ (worldwide)?

Select one category

- 1 to 19
 20 to 49
 50 to 99
 100 to 999
 1,000 or more

30. Have you or has your organization participated in any programs or activities sponsored by the Department of Foreign Affairs and International Trade (or Agriculture Canada)? Give the following examples if necessary: trade missions, Program for Export Market Development, WINEXPORT

- Foreign Affairs
 Agriculture Canada
 Both
 None

31. Observe region of office.

- NCR
 East
 Quebec
 Ontario
 West (including territories)
 Pacific (including Yukon)

32. *Core client?*

Observe from database for all relevant sectors

Yes

No

33. *Date publication mailed.*

Observe from database

____ *Month*

____ *Year*

34. *Sex*

Observe

Male

Female

Thank you for your time

Appendix B
Statistical Tables

	Count	Col %
Language of Interview		
English.....	642	84.0%
French.....	122	16.0%
Total.....	764	100.0%
segment		
Seafood.....	183	63.8%
Apparel.....	37	12.9%
Agriculture/food.....	51	17.8%
Furniture.....	3	1.0%
Medical.....	13	4.5%
Total.....	287	100.0%

	Count	Col %
Recall Cdn Fish & Seafood Exp. Sourcing Guide		
Yes.....	118	74.7%
No.....	40	25.3%
Total.....	158	100.0%
Recall diskette Cdn Fish & Seafood Exp. Sourcing Guide		
Yes.....	104	57.5%
No.....	77	42.5%
Total.....	181	100.0%
Recall hardcopy World Directory of Seafood Importers		
Yes.....	93	62.0%
No.....	57	38.0%
Total.....	150	100.0%
Recall diskette World Directory of Seafood Importers		
Yes.....	85	51.5%
No.....	80	48.5%
Total.....	165	100.0%
Recall Guidelines for Cdn Fish Exporters - USA		
Yes.....	73	62.9%
No.....	43	37.1%
Total.....	116	100.0%
Recall Guidelines for Cdn Fish Exporters - Japan		
Yes.....	91	70.5%
No.....	38	29.5%
Total.....	129	100.0%
Recall GMOR for Apparel		
Yes.....	102	33.2%
No.....	205	66.8%
Total.....	307	100.0%
Recall GMOR for Oilseed		
Yes.....	51	60.0%
No.....	34	40.0%
Total.....	85	100.0%
Recall GMOR for Pork		
Yes.....	20	60.6%
No.....	13	39.4%
Total.....	33	100.0%
Recall GMOR for Beef		
Yes.....	20	42.6%
No.....	27	57.4%
Total.....	47	100.0%
Recall GMOR for Contract Furniture		
Yes.....	14	53.8%
No.....	12	46.2%
Total.....	26	100.0%
Recall GMOR for Medical Devices		
Yes.....	25	64.1%
No.....	14	35.9%
Total.....	39	100.0%

	Count	Col %
USE the Cdn Fish & Seafood Exp. Sourcing Guide		
Yes.....	79	66.9%
No.....	39	33.1%
Total.....	118	100.0%
USE diskette Cdn Fish & Seafood Exp. Sourcing Guide		
Yes.....	54	51.9%
No.....	50	48.1%
Total.....	104	100.0%
USE hardcopy World Directory of Seafood Importers		
Yes.....	66	71.0%
No.....	27	29.0%
Total.....	93	100.0%
USE diskette World Directory of Seafood Importers		
Yes.....	46	54.1%
No.....	39	45.9%
Total.....	85	100.0%
USE Guidelines for Cdn Fish Exporters - USA		
Yes.....	46	63.0%
No.....	27	37.0%
Total.....	73	100.0%
USE Guidelines for Cdn Fish Exporters - Japan		
Yes.....	55	60.4%
No.....	36	39.6%
Total.....	91	100.0%
USE GMOR for Apparel		
Yes.....	37	36.3%
No.....	65	63.7%
Total.....	102	100.0%
USE GMOR for Oilseed		
Yes.....	32	62.7%
No.....	19	37.3%
Total.....	51	100.0%
USE GMOR for Pork		
Yes.....	13	65.0%
No.....	7	35.0%
Total.....	20	100.0%
USE GMOR for Beef		
Yes.....	15	75.0%
No.....	5	25.0%
Total.....	20	100.0%
USE GMOR for Contract Furniture		
Yes.....	3	21.4%
No.....	11	78.6%
Total.....	14	100.0%
USE GMOR for Medical Devices		
Yes.....	13	52.0%
No.....	12	48.0%
Total.....	25	100.0%

	Cases	Col Response %
As a direct result of reading/using the Guidelines for Canadian Fish Exporters USA		
Generated new sales in export markets.....	18	19.4%
Undertook new activities or make preparations to export.....	20	21.5%
Identified contacts for export market development.....	26	28.0%
Identified suppliers of goods/services that org'n purchases.....	20	21.5%
Nothing.....	8	8.6%
Other.....	1	1.1%
Total.....	38	100.0%
As a direct result of reading/using the Guidelines for Canadian Fish Exporters Japan		
Generated new sales in export markets.....	12	14.5%
Undertook new activities or make preparations to export.....	22	26.5%
Identified contacts for export market development.....	23	27.7%
Identified suppliers of goods/services that org'n purchases.....	11	13.3%
Nothing.....	13	15.7%
Use for reference / General use.....	1	1.2%
Other.....	1	1.2%
Total.....	46	100.0%

	Cases	Col Response %
As a direct result of reading/using the GMOR for Apparel		
Generated new sales in export markets.....	8	12.3%
Undertook new activities or make preparations to export.....	19	29.2%
Identified contacts for export market development.....	15	23.1%
Identified suppliers of goods/services that org'n purchases.....	10	15.4%
Not Applicable.....	1	1.5%
Nothing.....	10	15.4%
Other.....	2	3.1%
Total.....	37	100.0%
As a direct result of reading/using the GMOR for Oilseed		
Generated new sales in export markets.....	7	14.0%
Undertook new activities or make preparations to export.....	12	24.0%
Identified contacts for export market development.....	15	30.0%
Identified suppliers of goods/services that org'n purchases.....	7	14.0%
Nothing.....	4	8.0%
Use for reference / General use.....	2	4.0%
Other.....	3	6.0%
Total.....	28	100.0%

	Cases	Col Response %
As a direct result of reading/using the hardcopy version of the Canadian Fish & Seafood Exporters Sourcing Guide		
Generated new sales in export markets.....	25	16.4%
Undertook new activities or make preparations to export.....	31	20.4%
Identified contacts for export market development.....	47	30.9%
Identified suppliers of goods/services that org'n purchases.....	35	23.0%
Not Applicable.....	3	2.0%
Nothing.....	9	5.9%
Use for reference / General use.....	2	1.3%
Total.....	72	100.0%
As a direct result of reading/using the diskette copy of the Canadian Fish & Seafood Exporters Sourcing Guide		
Generated new sales in export markets.....	26	21.0%
Undertook new activities or make preparations to export.....	28	22.6%
Identified contacts for export market development.....	37	29.8%
Identified suppliers of goods/services that org'n purchases.....	26	21.0%
Nothing.....	4	3.2%
Use for reference / General use.....	2	1.6%
Other.....	1	.8%
Total.....	51	100.0%

	Cases	Col Response %
As a direct result of reading/using the hardcopy version of the World Directory of Seafood Importers		
Generated new sales in export markets.....	23	19.5%
Undertook new activities or make preparations to export.....	23	19.5%
Identified contacts for export market development.....	43	36.4%
Identified suppliers of goods/services that org'n purchases.....	22	18.6%
Nothing.....	5	4.2%
Use for reference / General use.....	1	.8%
Other.....	1	.8%
Total.....	53	100.0%
As a direct result of reading/using the diskette copy of the World Directory of Seafood Importers		
Generated new sales in export markets.....	18	20.5%
Undertook new activities or make preparations to export.....	17	19.3%
Identified contacts for export market development.....	26	29.5%
Identified suppliers of goods/services that org'n purchases.....	19	21.6%
Nothing.....	5	5.7%
Use for reference / General use.....	2	2.3%
Other.....	1	1.1%
Total.....	43	100.0%

	Cases	Col Response %
As a direct result of reading/using the GMOR for Pork		
Generated new sales in export markets.....	6	24.0%
Undertook new activities or make preparations to export.....	5	20.0%
Identified contacts for export market development.....	6	24.0%
Identified suppliers of goods/services that org'n purchases.....	3	12.0%
Nothing.....	4	16.0%
Use for reference / General use.....	1	4.0%
Total.....	13	100.0%
As a direct result of reading/using the GMOR for Beef		
Generated new sales in export markets.....	4	14.3%
Undertook new activities or make preparations to export.....	6	21.4%
Identified contacts for export market development.....	9	32.1%
Identified suppliers of goods/services that org'n purchases.....	5	17.9%
Nothing.....	1	3.6%
Use for reference / General use.....	3	10.7%
Total.....	15	100.0%

	Cases	Col Response %
As a direct result of reading/using the GMOR for Contract Furniture		
Generated new sales in export markets.....	1	20.0%
Undertook new activities or make preparations to export.....	1	20.0%
Identified contacts for export market development.....	1	20.0%
Identified suppliers of goods/services that org'n purchases.....	1	20.0%
Nothing.....	1	20.0%
Total.....	3	100.0%
As a direct result of reading/using the GMOR for Medical Devices		
Generated new sales in export markets.....	1	4.8%
Undertook new activities or make preparations to export.....	5	23.8%
Identified contacts for export market development.....	11	52.4%
Identified suppliers of goods/services that org'n purchases.....	3	14.3%
Nothing.....	1	4.8%
Total.....	13	100.0%

	Mean
The overall appearance/layout of the hardcopy version of the Canadian Fish & Seafood Exp. Sourcing Guide is appropriate.....	4
The overall appearance and layout of the hardcopy version of the World Directory of Seafood Importers is appropriate.....	4
The overall appearance and layout of the Guidelines for Canadian Fish Exporters - USA is appropriate.....	4
The overall appearance and layout of the Guidelines for Canadian Fish Exporters - Japan is appropriate.....	4
The overall appearance and layout of the GMOR for Apparel is appropriate.....	4
The overall appearance and layout of the GMOR for Oilseed is appropriate.....	4
The overall appearance and layout of the GMOR for Pork is appropriate.....	4
The overall appearance and layout of the GMOR for Beef is appropriate.....	4
The overall appearance and layout of the GMOR for contract Furniture is appropriate.....	4
The overall appearance and layout of the GMOR for Medcial Devices is appropriate	4

	Mean
The hardcopy version of the Canadian Fish and Seafood Exporters Sourcing Guide is well organized.....	4
The diskette copy of the Canadian Fish & Seafood Exporters Sourcing Guide is well organized.....	4
The hardcopy version of the World Directory Seafood Importers is well organized.	4
The diskette copy of the World Directory of Seafood Importers is well organized.	4
The Guidelines for Canadian Fish Exporters - USA is well organized.....	4
The Guidelines for Canadian Fish Exporters - Japan is well organized.....	4
The GMOR for Apparel is well organized.....	4
The GMOR for Oilseed is well organized.....	4
The GMOR for Pork is well organized.....	4
The GMOR for Beef is well organized.....	4
The GMOR for Contract Furniture is well organized.....	4
The GMOR for Medcial Devices is well organized.....	4

	Mean
The writing in the hardcopy version of the Canadian Fish and Seafood Exporters Sourcing Guide is easy to understand.....	4
The writing in the diskette copy of the Canadian Fish & Seafood Exporters Sourcing Guide is easy to understand.....	4
The writing in the hardcopy version of the World Directory of Seafood Importers is easy to understand.....	4
The writing in the diskette copy of the World Directory of Seafood Importers is easy to understand.....	4
The writing in the Guidelines for Canadian Fish Exporters - USA is easy to understand.....	4
The writing in the Guidelines for Canadian Fish Exporters - Japan is easy to understand.....	4
The writing in the GMOR for Apparel is easy to understand.....	4
The writing in the GMOR for Oilseed is easy to understand.....	4
The writing in the GMOR for Pork is easy to understand.....	4
The writing in the GMOR for Beef is easy to understand.....	4
The writing in the GMOR for Contract Furniture is easy to understand.....	4
The writing in the GMOR for Medical Devices is easy to understand.....	4

	Mean
The hardcopy version of the Canadian Fish and Seafood Exporters Sourcing Guide is an appropriate length.....	4
The diskette copy of the Canadian Fish & Seafood Exporters Sourcing Guide is an appropriate length.....	4
The hardcopy version of the World Directory of Seafood Importers is an appropriate length.....	3
The diskette copy of the World Directory of Seafood Importers is an appropriate length.....	4
The Guidelines for Canadian Fish Exporters - USA is an appropriate length.....	3
The Guidelines for Canadian Fish Exporters - Japan is an appropriate length....	4
The GMOR for Apparel is an appropriate length.....	4
The GMOR for Oilseed is an appropriate length.....	4
The GMOR for Pork is an appropriate length.....	3
The GMOR for Beef is an appropriate length.....	4
The GMOR for Contract Furniture is an appropriate length.....	4
The GMOR for Medical Devices is an appropriate length.....	3

	Mean
The hardcopy version of the Fish and Seafood Exporters Sourcing Guide is an appropriate size.....	4
The hardcopy version of the World Directory of Seafood Importers is an appropriate size.....	4
The Guidelines for Canadian Fish Exporters - USA is an appropriate size.....	4
The Guidelines for Canadian Fish Exporters - Japan is an appropriate size.....	4
The GMOR for Apparel is an appropriate size.....	4
The GMOR for Oilseed is an appropriate size.....	4
The GMOR for Pork is an appropriate size.....	4
The GMOR for Beef is an appropriate size.....	4
The GMOR for Contract Furniture is an appropriate size.....	4
The GMOR for Medical Devices is an appropriate size.....	4

	Mean
Usefulness of the hardcopy version of the Canadian Fish & Seafood Exp. Sourcing Guide as an overall information tool.....	4
Usefulness of the diskette copy of the Canadian Fish & Seafood Exporters Sourcing Guide as an overall information tool.....	4
Usefulness of the hardcopy version of the World Directory of Seafood Importers as an overall information tool.....	4
Usefulness of the diskette copy of the World Directory of Seafood Importers as an overall information tool.....	4
Usefulness of the guidelines for Canadian Fish Exporters - USA as an overall information tool.....	3
Usefulness of the Guidelines for Canadian Fish Exporters - Japan as an overall information tool.....	4
Usefulness of the GMOR for Apparel as an overall information tool.....	3
Usefulness of the GMOR for Oilseed as an overall information tool.....	3
Usefulness of the GMOR for Pork as an overall information tool.....	3
Usefulness of the GMOR for Beef as an overall information tool.....	3
Usefulness of the GMOR for Contracte Furniture as an overall information tool...	4
Usefulness of the GMOR for Medical Devices as an overall information tool.....	3

	Count	Col %
Additions, changes, improvements to format/contents of the hardcopy ver. of the Cdn. Fish & Seafood Exp. Sourcing Guide		
None.....	55	76.4%
More specific info on companies providing products.....	3	4.2%
More specific info on products (fish,pork, etc.).....	5	6.9%
More info on contacts/customers.....	1	1.4%
Update the lists/info.....	3	4.2%
More specific info on mkt opportunities/products in demand.....	1	1.4%
Make it shorter/more precise.....	1	1.4%
Other.....	3	4.2%
Total.....	72	100.0%
Additions, changes, improvements to format/contents of the diskette copy of the Cdn. Fish & Seafood Exp. Sourcing Guide		
None.....	38	74.5%
More specific info on products (fish,pork, etc.).....	1	2.0%
More info on contacts/customers.....	2	3.9%
Update the lists/info.....	2	3.9%
Make it shorter/more precise.....	1	2.0%
Other.....	7	13.7%
Total.....	51	100.0%
Additions, changes, improvements to format/contents of the hardcopy version of the World directory of Seafood Importers		
None.....	38	64.4%
More specific info on companies providing products.....	3	5.1%
More specific info on products (fish,pork, etc.).....	3	5.1%
More info on contacts/customers.....	2	3.4%
Update the lists/info.....	3	5.1%
More specific info on mkt opportunities/products in demand.....	3	5.1%
Make it shorter/more precise.....	1	1.7%
Other.....	6	10.2%
Total.....	59	100.0%
Additions, changes, improvements to format/contents of the dislette copy of the World Directory of Seafood Importers		
None.....	34	77.3%
More specific info on companies providing products.....	1	2.3%
Update the lists/info.....	3	6.8%
More specific info on mkt opportunities/products in demand.....	2	4.5%
Other.....	4	9.1%
Total.....	44	100.0%

(continued)

	Count	Col %
Additions, changes, improvements to format/contents of the guidelines for Canadian Fish Exporters - USA		
None.....	34	81.0%
More info on contacts/customers.....	1	2.4%
Update the lists/info.....	2	4.8%
More specific info on mkt opportunities/products in demand.....	1	2.4%
Make it shorter/more precise.....	1	2.4%
Other.....	3	7.1%
Total.....	42	100.0%
Additions, changes, improvements to format/contents of the Guidelines for Canadian Fish Exporters - Japan		
None.....	40	83.3%
More specific info on companies providing products.....	1	2.1%
More info on contacts/customers.....	2	4.2%
Update the lists/info.....	2	4.2%
More specific info on mkt opportunities/products in demand.....	2	4.2%
Other.....	1	2.1%
Total.....	48	100.0%
Additions, changes, improvements to format or contents of the GMOR for Apparel		
None.....	27	73.0%
More specific info on companies providing products.....	1	2.7%
More specific info on products (fish,pork, etc.).....	2	5.4%
More info on contacts/customers.....	1	2.7%
More specific info on mkt opportunities/products in demand.....	2	5.4%
Other.....	4	10.8%
Total.....	37	100.0%
Additions, changes, improvements to format or contents to the GMOR for Oilseed		
None.....	28	87.5%
More specific info on companies providing products.....	1	3.1%
More specific info on products (fish,pork, etc.).....	1	3.1%
Make it shorter/more precise.....	1	3.1%
Other.....	1	3.1%
Total.....	32	100.0%

(continued)

	Count	Col %
Additions, changes, improvements to format or contents to the GMOR for Pork		
None.....	8	61.5%
More info on contacts/customers.....	1	7.7%
Update the lists/info.....	2	15.4%
More specific info on mkt opportunities/products in demand.....	1	7.7%
Other.....	1	7.7%
Total.....	13	100.0%
Additions, changes, improvements to format or contents of the GMOR for Beef		
None.....	12	80.0%
More specific info on products (fish,pork, etc.).....	1	6.7%
More info on contacts/customers.....	1	6.7%
Update the lists/info.....	1	6.7%
Total.....	15	100.0%
Additions, changes, improvements to format or contents of the GMOR for Contract Furniture		
None.....	3	100.0%
Total.....	3	100.0%
Additions, changes, improvements to format or contents of the GMOR for Medcial Devices		
None.....	11	84.6%
More specific info on companies providing products.....	2	15.4%
Total.....	13	100.0%

	Cases	Col Response %
Preferred format for hardcopy version of the Canadian Fish & Seafood Exporters Sourcing Guide		
hardcopy.....	57	54.8%
interactive fax.....	13	12.5%
electronic format.....	34	32.7%
Total.....	72	100.0%
Preferred format for diskette copy of the Canadian Fish & Seafood Exporters Sourcing Guide		
hardcopy format.....	39	50.6%
interactive fax.....	7	9.1%
electronic format.....	31	40.3%
Total.....	51	100.0%
Preferred format for the hardcopy version of the World Directory of Seafood Importers		
hardcopy format.....	53	58.2%
interactive fax.....	12	13.2%
electronic format.....	26	28.6%
Total.....	59	100.0%
Preferred format for the diskette copy of the World Directory of Seafood Importers		
hardcopy format.....	34	50.7%
interactive fax.....	7	10.4%
electronic format.....	26	38.8%
Total.....	44	100.0%
Preferred format for the Guidelines for Canadian Fish Exporters - USA		
hardcopy format.....	36	63.2%
interactive fax.....	7	12.3%
electronic format.....	14	24.6%
Total.....	42	100.0%
Preferred format for the Guidelines for Canadian Fish Exporters - Japan		
hardcopy format.....	44	62.0%
interactive fax.....	9	12.7%
electronic format.....	18	25.4%
Total.....	48	100.0%

(continued)

	Cases	Col Response %
Preferred format for the GMOR for Apparel		
hardcopy format.....	29	61.7%
interactive fax.....	14	29.8%
electronic format.....	4	8.5%
Total.....	37	100.0%
Preferred format for the GMOR for Oilseed		
hardcopy format.....	27	54.0%
interactive fax.....	9	18.0%
electronic format.....	14	28.0%
Total.....	32	100.0%
Preferred format for the GMOR for Pork		
hardcopy format.....	7	38.9%
interactive fax.....	6	33.3%
electronic format.....	5	27.8%
Total.....	13	100.0%
Preferred format for the GMOR for Beef		
hardcopy format.....	12	57.1%
interactive fax.....	4	19.0%
electronic format.....	5	23.8%
Total.....	15	100.0%
Preferred format for the GMOR for Contract Furniture		
hardcopy format.....	2	66.7%
interactive fax.....	1	33.3%
Total.....	3	100.0%
Preferred format for the GMOR for Medical Devices		
hardcopy format.....	11	55.0%
interactive fax.....	3	15.0%
electronic format.....	6	30.0%
Total.....	13	100.0%

	Count	Col %
Preferred electronic formats for the hardcopy version of the Canadian Fish & Seafood Exporters Sourcing Guide		
Diskette.....	25	73.5%
CD ROM.....	2	5.9%
Via the Internet.....	5	14.7%
Direct-dial BBS.....	2	5.9%
Total.....	34	100.0%
Preferred electronic formats for the diskette copy of the Canadian Fish & Seafood Exporters Sourcing Guide		
Diskette.....	24	77.4%
CD ROM.....	1	3.2%
Via the Internet.....	3	9.7%
Direct-dial BBS.....	3	9.7%
Total.....	31	100.0%
Preferred electronic formats for the hardcopy version of the World directory of Seafood Importers		
Diskette.....	18	72.0%
CD ROM.....	1	4.0%
Via the Internet.....	2	8.0%
Direct-dial BBS.....	4	16.0%
Total.....	25	100.0%
Preferred electronic formats for the diskette copy of the World Directory of Seafood Importers		
Diskette.....	20	76.9%
CD ROM.....	1	3.8%
Via the Internet.....	2	7.7%
Direct-dial BBS.....	3	11.5%
Total.....	26	100.0%
Preferred electronic formats for the Guidelines for Canadian Fish Exporters - USA		
Diskette.....	11	78.6%
CD ROM.....	1	7.1%
Direct-dial BBS.....	2	14.3%
Total.....	14	100.0%
Preferred electronic formats for the Guidelines for Canadian Fish Exporters - Japan		
Diskette.....	15	83.3%
Via the Internet.....	2	11.1%
Direct-dial BBS.....	1	5.6%
Total.....	18	100.0%

(continued)

	Count	Col %
Preferred electronic formats for the GMOR for Apparel		
Diskette.....	1	25.0%
Via the Internet.....	2	50.0%
Direct-dial BBS.....	1	25.0%
Total.....	4	100.0%
Preferred electronic formats for the GMOR for Oilseed		
Diskette.....	8	57.1%
CD ROM.....	2	14.3%
Via the Internet.....	2	14.3%
Direct-dial BBS.....	2	14.3%
Total.....	14	100.0%
Preferred electronic formats for the GMOR for Pork		
CD ROM.....	3	75.0%
Via the Internet.....	1	25.0%
Total.....	4	100.0%
Preferred electronic formats for the GMOR for Beef		
Diskette.....	1	20.0%
CD ROM.....	2	40.0%
Via the Internet.....	1	20.0%
Direct-dial BBS.....	1	20.0%
Total.....	5	100.0%
Preferred electronic formats for the GMOR for Contract Furniture		
.....		
Total.....		
Preferred electronic formats for the GMOR for Medical Devices		
Diskette.....	3	50.0%
Via the Internet.....	2	33.3%
Direct-dial BBS.....	1	16.7%
Total.....	6	100.0%

	Count	Col %
Would pay \$10 for the harcopy version of the Canadian Fish & Seafood Exporters Sourcing Guide		
Yes.....	50	69.4%
No.....	22	30.6%
Total.....	72	100.0%
Would pay \$5 for the hardcopy version of the Canadian Fish & Seafood Exporters Sourcing Guide		
Yes.....	8	36.4%
No.....	14	63.6%
Total.....	22	100.0%
Would pay \$10 for the diskette copy of the Canadian Fish & Seafood Exporters Sourcing Guide		
Yes.....	41	80.4%
No.....	10	19.6%
Total.....	51	100.0%
Would pay \$5 for a diskette copy of the Canadian Fish & Seafood Exporters Sourcing Guide		
Yes.....	5	50.0%
No.....	5	50.0%
Total.....	10	100.0%
Would pay \$10 for the hardcopy version of the World Directory of Seafood Importers		
Yes.....	44	74.6%
No.....	15	25.4%
Total.....	59	100.0%
Would pay \$5 for the hardcopy version of the World Directory of Seafood Importers		
Yes.....	6	40.0%
No.....	9	60.0%
Total.....	15	100.0%
Would pay \$10 for the diskette copy of the World Directory of Sefood Importers		
Yes.....	35	79.5%
No.....	9	20.5%
Total.....	44	100.0%
Would pay \$5 for the diskette copy of the world Directory of Seafood Importers		
Yes.....	3	33.3%
No.....	6	66.7%
Total.....	9	100.0%

(continued)

	Count	Col %
Would pay \$10 for the Guidelines for Canadian Fish Exporters - USA		
Yes.....	29	69.0%
No.....	13	31.0%
Total.....	42	100.0%
Would pay \$5 for the Guidelines for Canadian Fish Exporters - USA		
Yes.....	6	46.2%
No.....	7	53.8%
Total.....	13	100.0%
Would pay \$10 for the Guidelines for Canadian fish Exporters - Japan		
Yes.....	30	62.5%
No.....	18	37.5%
Total.....	48	100.0%
Would pay \$5 for the Guidelines for Canadian Fish Exporters - Japan		
Yes.....	8	44.4%
No.....	10	55.6%
Total.....	18	100.0%
Would pay \$10 for the GMOR for Apparel		
Yes.....	20	54.1%
No.....	17	45.9%
Total.....	37	100.0%
Would pay \$5 for the GMOR for Apparel		
Yes.....	9	52.9%
No.....	8	47.1%
Total.....	17	100.0%
Would pay \$10 for the GMOR for Oilseed		
Yes.....	24	75.0%
No.....	8	25.0%
Total.....	32	100.0%
Would pay \$5 for the GMOR for Oilseed		
Yes.....	3	37.5%
No.....	5	62.5%
Total.....	8	100.0%

(continued)

	Count	Col %
Would pay \$10 for the GMOR for Pork		
Yes.....	9	69.2%
No.....	4	30.8%
Total.....	13	100.0%
Would pay \$5 for the GMOR for Pork		
No.....	4	100.0%
Total.....	4	100.0%
Would pay \$10 for the GMOR for Beef		
Yes.....	9	60.0%
No.....	6	40.0%
Total.....	15	100.0%
Would pay \$5 for the GMOR for Beef		
Yes.....	2	33.3%
No.....	4	66.7%
Total.....	6	100.0%
Would pay \$10 for the GMOR for Contract Furniture		
Yes.....	1	33.3%
No.....	2	66.7%
Total.....	3	100.0%
Would pay \$5 for the GMOR for Contract Furniture		
No.....	2	100.0%
Total.....	2	100.0%
Would pay \$10 for the GMOR for Medical Devices		
Yes.....	8	61.5%
No.....	5	38.5%
Total.....	13	100.0%
Would pay \$5 for the GMOR for Medical Devices		
Yes.....	2	40.0%
No.....	3	60.0%
Total.....	5	100.0%

	Count	Col %
Would pay for hardcopy of CFSESG		
would pay.....	58	80.6%
would not pay.....	14	19.4%
Total.....	72	100.0%
Would pay for diskette of CFSESG		
would pay.....	46	90.2%
would not pay.....	5	9.8%
Total.....	51	100.0%
Would pay for hardcopy of WDSI		
would pay.....	50	84.7%
would not pay.....	9	15.3%
Total.....	59	100.0%
Would pay for diskette of WDSI		
would pay.....	38	86.4%
would not pay.....	6	13.6%
Total.....	44	100.0%
Would pay for GCFE - USA		
would pay.....	35	83.3%
would not pay.....	7	16.7%
Total.....	42	100.0%
Would pay for GCFE - Japan		
would pay.....	38	79.2%
would not pay.....	10	20.8%
Total.....	48	100.0%

(continued)

	Count	Col %
Would pay for GMOR for Apparel		
would pay.....	29	78.4%
would not pay.....	8	21.6%
Total.....	37	100.0%
Would pay for GMOR for Oilseed		
would pay.....	27	84.4%
would not pay.....	5	15.6%
Total.....	32	100.0%
Would pay for GMOR for Pork		
would pay.....	9	69.2%
would not pay.....	4	30.8%
Total.....	13	100.0%
Would pay for GMOR for Beef		
would pay.....	11	73.3%
would not pay.....	4	26.7%
Total.....	15	100.0%
Would pay for GMOR for Contract Furniture		
would pay.....	1	33.3%
would not pay.....	2	66.7%
Total.....	3	100.0%
Would pay for GMOR for Medical Devices		
would pay.....	10	76.9%
would not pay.....	3	23.1%
Total.....	13	100.0%

	Count	Col %
Contacted InfoCentre to order document(s)		
Yes.....	124	43.2%
No.....	109	38.0%
DON'T KNOW.....	54	18.8%
Total.....	287	100.0%

	Mean
The person I talked to was helpful.....	5
I received the material promptly.....	4
It was easy to reach the right contact person by phone.....	4

	Mean
Overall Service Provided by the InfoCentre.....	4

	Count	Col %
Have used FaxLink		
Yes.....	39	16.2%
No.....	202	83.8%
Total.....	241	100.0%
Aware of Faxlink service		
Yes.....	62	30.4%
No.....	142	69.6%
Total.....	204	100.0%

	Cases	Col Response %
Reason for not using FaxLink		
Info available through it doesn't meet my needs.....	17	27.0%
No access to fax machine.....	6	9.5%
Interested in it, but haven't had chance to use it.....	15	23.8%
Prefer another format.....	9	14.3%
Prefer personal contact.....	4	6.3%
No need for it.....	5	7.9%
Other.....	7	11.1%
Total.....	59	100.0%

	Mean
Satisfaction with FaxLink service.....	4

	Cases	Col Response %
Reason dissatisfied with Facts Link		
Info available doesn't meet my needs.....	2	18.2%
Slow speed of info transfer.....	2	18.2%
The info is out of date.....	1	9.1%
Experienced technical problems.....	1	9.1%
Hard to get through.....	4	36.4%
Other.....	1	9.1%
Total.....	8	100.0%

	Count	Col %
Title or function		
EA/Assistant.....	38	5.0%
Professor/Researcher.....	11	1.4%
Student.....	2	.3%
Executive.....	456	59.8%
General/Operating Manager.....	60	7.9%
Sales/Marketing manager.....	50	6.6%
Office manager/administrator.....	15	2.0%
Other manager.....	51	6.7%
Controller/Treasurer/Finance area.....	24	3.1%
Trader/Broker/Agent.....	11	1.4%
Librarian.....	6	.8%
Other.....	39	5.1%
Total.....	763	100.0%
Type of organization		
Private company.....	706	92.4%
Association.....	34	4.5%
University/educational.....	8	1.0%
Other.....	16	2.1%
Total.....	764	100.0%

	Count	Col %
Nature of business		
Primary resource or production business.....	228	31.2%
Secondary processing business.....	136	18.6%
Distribution, wholesale or retail business.....	235	32.1%
Service business.....	98	13.4%
Trading.....	8	1.1%
Import/export.....	22	3.0%
Other.....	4	.5%
Total.....	731	100.0%
Revenues in the last year		
Under \$100,000.....	91	14.3%
\$100,000 to \$499,999.....	91	14.3%
\$500,000 to \$999,999.....	69	10.8%
\$1 to \$5 mil.....	188	29.5%
\$5 to \$10 mil.....	68	10.7%
\$10 mil plus.....	131	20.5%
Total.....	638	100.0%

	Count	Col %
Percentage of total revenues from export market sales		
0%.....	167	25.1%
1% to 49%.....	270	40.5%
50% or more.....	229	34.4%
Total.....	666	100.0%

	Count	Col %
Number of employees (worldwide)		
1 to 19.....	378	50.3%
20 to 49.....	135	18.0%
50 to 99.....	78	10.4%
100 to 999.....	114	15.2%
1,000 plus.....	46	6.1%
Total.....	751	100.0%
Participated in programs by Foreign Affairs		
Yes.....	234	37.5%
No.....	390	62.5%
Total.....	624	100.0%
Participated in programs by Foreign Affairs/Agriculture Canada		
Just Foreign Affairs.....	23	16.3%
Just Agriculture Canada.....	17	12.1%
Both.....	29	20.6%
None.....	72	51.1%
Total.....	141	100.0%

	Count	Col %
Month publication received		
1.....	43	8.3%
2.....	147	28.4%
3.....	53	10.3%
4.....	3	.6%
5.....	76	14.7%
6.....	11	2.1%
7.....	14	2.7%
8.....	54	10.4%
9.....	71	13.7%
10.....	7	1.4%
11.....	31	6.0%
12.....	7	1.4%
Total.....	517	100.0%
Year publication received		
92.....	111	21.5%
94.....	246	47.6%
95.....	160	30.9%
Total.....	517	100.0%
Date publication mailed		
6 months ago.....	235	45.5%
6 months to a year ago.....	137	26.5%
1 to 2 years ago.....	35	6.8%
more than 2 years ago.....	110	21.3%
Total.....	517	100.0%
Core Client		
0.....	726	94.9%
Core.....	39	5.1%
Total.....	765	100.0%
Gender of Respondent		
Male.....	609	79.6%
Female.....	156	20.4%
Total.....	765	100.0%

	Cases	Col Response %
Use of hardcopy version of the Canadian Fish & Seafood Exporters Sourcing Guide		
Primarily a reference tool for use by others.....	31	21.7%
To support decisions about export market development.....	20	14.0%
For research purposes.....	28	19.6%
To support policy decisions.....	7	4.9%
Primarily for the contact lists.....	45	31.5%
Read/look at it out of general interest only.....	9	6.3%
Other.....	3	2.1%
Total.....	79	100.0%
Reason for not using the hardcopy version of the Canadian Fish & Seafood Exporters sourcing Guide		
Don't have the time, but subject matter is of interest.....	6	14.6%
The subject matter is not directly relevant to job or role.....	14	34.1%
Subject of interest, haven't found useful info in past eds.....	6	14.6%
No fish to export / don't fish anymore.....	3	7.3%
Info is too general/irrelevant/only useful for new co's.....	1	2.4%
Just received / haven't received yet.....	1	2.4%
Passed it on to Head Office/Clients/Others.....	3	7.3%
Prefer information on diskette.....	2	4.9%
Other.....	5	12.2%
Total.....	38	100.0%
Use of diskette copy of the Canadian Fish & Seafood Exporters Sourcing Guide		
Primarily a reference tool for use by others.....	27	26.5%
To support decisions about export market development.....	16	15.7%
For research purposes.....	16	15.7%
To support policy decisions.....	6	5.9%
Primarily for the contact lists.....	31	30.4%
Read/look at it out of general interest only.....	4	3.9%
Other.....	2	2.0%
Total.....	54	100.0%
Reason for not using the diskette copy of the Canadian Fish & Seafood Exporters Sourcing Guide		
Don't have the time, but subject matter is of interest.....	3	6.0%
The subject matter is not directly relevant to job or role.....	14	28.0%
Subject of interest, haven't found useful info in past eds.....	4	8.0%
The lists are inaccurate/not up-to-date.....	2	4.0%
No fish to export / don't fish anymore.....	2	4.0%
Info is too general/irrelevant/only useful for new co's.....	1	2.0%
Computer incompatibility.....	11	22.0%
Just received / haven't received yet.....	3	6.0%
Passed it on to Head Office/Clients/Others.....	2	4.0%
Other.....	8	16.0%
Total.....	49	100.0%

	Cases	Col Response %
Use of hardcopy version of the World Directory of Seafood Importers		
Primarily a reference tool for use by others.....	32	24.6%
To support decisions about export market development.....	15	11.5%
For research purposes.....	26	20.0%
To support policy decisions.....	5	3.8%
Primarily for the contact lists.....	42	32.3%
Read/look at it out of general interest only.....	9	6.9%
Other.....	1	.8%
Total.....	66	100.0%
Reason for not using the hardcopy version of the World Directory of Seafood Importers		
Don't have the time, but subject matter is of interest.....	6	19.4%
The subject matter is not directly relevant to job or role.....	7	22.6%
Subject of interest, haven't found useful info in past eds.....	4	12.9%
No fish to export / don't fish anymore.....	5	16.1%
Info is too general/irrelevant/only useful for new co's.....	2	6.5%
Just received / haven't received yet.....	1	3.2%
Passed it on to Head Office/Clients/Others.....	2	6.5%
Other.....	4	12.9%
Total.....	27	100.0%
Use of diskette copy of the World Directory of Seafood Importers		
Primarily a reference tool for use by others.....	24	25.0%
To support decisions about export market development.....	18	18.8%
For research purposes.....	17	17.7%
To support policy decisions.....	6	6.3%
Primarily for the contact lists.....	25	26.0%
Read/look at it out of general interest only.....	5	5.2%
Other.....	1	1.0%
Total.....	46	100.0%
Reason for not using the diskette copy of the World Directory of Seafood Importers		
Don't have the time, but subject matter is of interest.....	7	16.7%
The subject matter is not directly relevant to job or role.....	10	23.8%
Subject of interest, haven't found useful info in past eds.....	4	9.5%
The lists are inaccurate/not up-to-date.....	2	4.8%
No fish to export / don't fish anymore.....	3	7.1%
Computer incompatibility.....	9	21.4%
Other.....	7	16.7%
Total.....	39	100.0%

	Cases	Col Response %
Use of Guidelines for Canadian Fish Exporters - USA		
Primarily a reference tool for use by others.....	24	26.7%
To support decisions about export market development.....	14	15.6%
For research purposes.....	16	17.8%
To support policy decisions.....	5	5.6%
Primarily for the contact lists.....	21	23.3%
Read/look at it out of general interest only.....	8	8.9%
Other.....	2	2.2%
Total.....	46	100.0%
Reason for not using the Guidelines for Canadian Fish Exporters - USA		
Don't have the time, but subject matter is of interest.....	2	7.1%
The subject matter is not directly relevant to job or role.....	12	42.9%
Subject of interest, haven't found useful info in past eds.....	4	14.3%
The lists are inaccurate/not up-to-date.....	1	3.6%
No fish to export / don't fish anymore.....	3	10.7%
Info is too general/irrelevant/only usefual for new co's.....	3	10.7%
Passed it on to Head Office/Clients/Others.....	1	3.6%
Other.....	2	7.1%
Total.....	26	100.0%
Use of the Guidelines for Canadian Fish Exporters - Japan		
Primarily a reference tool for use by others.....	26	26.3%
To support decisions about export market development.....	18	18.2%
For research purposes.....	19	19.2%
To support policy decisions.....	3	3.0%
Primarily for the contact lists.....	23	23.2%
Read/look at it out of general interest only.....	10	10.1%
Total.....	54	100.0%
Reason for not using the Guidelines for Canadian Fish Exporters - Japan		
Don't have the time, but subject matter is of interest.....	4	10.8%
The subject matter is not directly relevant to job or role.....	17	45.9%
Subject of interest, haven't found useful info in past eds.....	4	10.8%
No fish to export / don't fish anymore.....	3	8.1%
Info is too general/irrelevant/only useful for new co's.....	4	10.8%
Passed it on to Head Office/Clients/Others.....	2	5.4%
Other.....	3	8.1%
Total.....	35	100.0%

	Cases	Col Response %
Use of the GMOR for Apparel		
Primarily a reference tool for use by others.....	15	20.0%
To support decisions about export market development.....	15	20.0%
For research purposes.....	16	21.3%
To support policy decisions.....	6	8.0%
Primarily for the contact lists.....	9	12.0%
Read/look at it out of general interest only.....	13	17.3%
Other.....	1	1.3%
Total.....	37	100.0%
Reason for not using the GMOR for Apparel		
Don't have the time, but subject matter is of interest.....	9	12.0%
The subject matter is not directly relevant to job or role.....	41	54.7%
Subject of interest, haven't found useful info in past eds.....	9	12.0%
The lists are inaccurate/not up-to-date.....	2	2.7%
Info is too general/irrelevant/only useful for new co's.....	3	4.0%
Other.....	11	14.7%
Total.....	64	100.0%
Use of the GMOR for Oilseed		
Primarily a reference tool for use by others.....	18	30.0%
To support decisions about export market development.....	11	18.3%
For research purposes.....	13	21.7%
To support policy decisions.....	4	6.7%
Primarily for the contact lists.....	8	13.3%
Read/look at it out of general interest only.....	6	10.0%
Total.....	31	100.0%
Reason for not using the GMOR for Oilseed		
Don't have the time, but subject matter is of interest.....	5	25.0%
The subject matter is not directly relevant to job or role.....	8	40.0%
Subject of interest, haven't found useful info in past eds.....	3	15.0%
The lists are inaccurate/not up-to-date.....	1	5.0%
Passed it on to Head Office/Clients/Others.....	2	10.0%
Other.....	1	5.0%
Total.....	19	100.0%

	Cases	Col Response %
Use of the GMOR for Pork		
Primarily a reference tool for use by others.....	3	11.1%
To support decisions about export market development.....	5	18.5%
For research purposes.....	7	25.9%
To support policy decisions.....	3	11.1%
Primarily for the contact lists.....	5	18.5%
Read/look at it out of general interest only.....	4	14.8%
Total.....	13	100.0%
Reason for not using the GMOR for Pork		
Don't have the time, but subject matter is of interest.....	1	16.7%
The subject matter is not directly relevant to job or role.....	2	33.3%
Subject of interest, haven't found useful info in past eds.....	3	50.0%
Total.....	6	100.0%
Use of the GMOR for Beef		
Primarily a reference tool for use by others.....	5	14.7%
To support decisions about export market development.....	7	20.6%
For research purposes.....	8	23.5%
To support policy decisions.....	2	5.9%
Primarily for the contact lists.....	7	20.6%
Read/look at it out of general interest only.....	5	14.7%
Total.....	15	100.0%
Reason for not using the GMOR for Beef		
Don't have the time, but subject matter is of interest.....	1	16.7%
The subject matter is not directly relevant to job or role.....	3	50.0%
Subject of interest, haven't found useful info in past eds.....	1	16.7%
Info is too general/irrelevant/only useful for new co's.....	1	16.7%
Total.....	5	100.0%

	Cases	Col Response %
Use of the GMOR for Contract Furniture		
For research purposes.....	1	20.0%
To support policy decisions.....	1	20.0%
Primarily for the contact lists.....	2	40.0%
Read/look at it out of general interest only.....	1	20.0%
Total.....	3	100.0%
Reason for not using the GMOR for Contract Furniture		
Don't have the time, but subject matter is of interest.....	3	27.3%
The subject matter is not directly relevant to job or role.....	7	63.6%
Info is too general/irrelevant/only useful for new co's.....	1	9.1%
Total.....	11	100.0%
Use of the GMOR for Medical Devices		
Primarily a reference tool for use by others.....	4	16.7%
To support decisions about export market development.....	4	16.7%
For research purposes.....	9	37.5%
Primarily for the contact lists.....	5	20.8%
Read/look at it out of general interest only.....	2	8.3%
Total.....	13	100.0%
Reason for not using the GMOR for Medical Devices		
Don't have the time, but subject matter is of interest.....	6	50.0%
The subject matter is not directly relevant to job or role.....	4	33.3%
Subject of interest, haven't found useful info in past eds.....	1	8.3%
Info is too general/irrelevant/only useful for new co's.....	1	8.3%
Total.....	12	100.0%

	Count	Col %
Circulate Cdn Fish & Seafood Exp. Sourcing Guide		
Yes.....	61	51.7%
No.....	57	48.3%
Total.....	118	100.0%
# people circulate Cdn Fish & Seafood Exp. Sourcing Guide to		
One.....	12	21.1%
Two.....	11	19.3%
Three.....	16	28.1%
Four.....	6	10.5%
Five.....	6	10.5%
Six.....	2	3.5%
Eight.....	1	1.8%
Ten.....	1	1.8%
40.....	1	1.8%
60.....	1	1.8%
Total.....	57	100.0%

	Count	Col %
Circulate diskette Cdn Fish & Seafood Exp. Sourcing Guide		
Yes.....	45	43.3%
No.....	59	56.7%
Total.....	104	100.0%
# people circulate diskette Cdn Fish & Seafood Exp. Sourcing Guide to		
One.....	8	18.6%
Two.....	12	27.9%
Three.....	10	23.3%
Four.....	2	4.7%
Five.....	7	16.3%
Six.....	2	4.7%
Eight.....	1	2.3%
20.....	1	2.3%
Total.....	43	100.0%

	Count	Col %
Circulate hardcopy World Directory of Seafood Importers		
Yes.....	34	36.6%
No.....	59	63.4%
Total.....	93	100.0%
# people circulate hardcopy World Directory of Seafood Importers to #		
One.....	5	16.1%
Two.....	5	16.1%
Three.....	6	19.4%
Four.....	4	12.9%
Five.....	2	6.5%
Six.....	3	9.7%
Eight.....	1	3.2%
12.....	2	6.5%
40.....	1	3.2%
50.....	1	3.2%
60.....	1	3.2%
Total.....	31	100.0%

	Count	Col %
Circulate diskette World Directory of Seafood Importers		
Yes.....	31	36.5%
No.....	54	63.5%
Total.....	85	100.0%
# people circulate diskette World Directory of Seafood Importers to #		
One.....	8	27.6%
Two.....	8	27.6%
Three.....	8	27.6%
Five.....	1	3.4%
20.....	2	6.9%
40.....	1	3.4%
50.....	1	3.4%
Total.....	29	100.0%

	Count	Col %
Circulate Guidelines for Cdn Fish Exporters - USA		
Yes.....	29	39.7%
No.....	44	60.3%
Total.....	73	100.0%
# people circulate Guidelines for Cdn Fish Exporters - USA to		
One.....	5	19.2%
Two.....	5	19.2%
Three.....	8	30.8%
Four.....	2	7.7%
Five.....	2	7.7%
Six.....	1	3.8%
Eight.....	1	3.8%
Ten.....	1	3.8%
12.....	1	3.8%
Total.....	26	100.0%

	Count	Col %
Circulate Guidelines for Cdn Fish Exporters - Japan		
Yes.....	35	38.5%
No.....	56	61.5%
Total.....	91	100.0%
# people circulate Guidelines for Cdn Fish Exporters - Japan to		
One.....	5	16.1%
Two.....	9	29.0%
Three.....	6	19.4%
Four.....	3	9.7%
Five.....	4	12.9%
Eight.....	1	3.2%
Nine.....	2	6.5%
40.....	1	3.2%
Total.....	31	100.0%

	Count	Col %
Circulate GMOR for Apparel		
Yes.....	35	34.3%
No.....	67	65.7%
Total.....	102	100.0%
# people circulate GMOR for Apparel to		
One.....	8	24.2%
Two.....	12	36.4%
Three.....	3	9.1%
Four.....	6	18.2%
Five.....	1	3.0%
Six.....	1	3.0%
Ten.....	1	3.0%
12.....	1	3.0%
Total.....	33	100.0%

	Count	Col %
Circulate GMOR for Oilseed		
Yes.....	28	54.9%
No.....	23	45.1%
Total.....	51	100.0%
# people circulate GMOR for Oilseed to		
One.....	6	23.1%
Two.....	7	26.9%
Three.....	4	15.4%
Four.....	1	3.8%
Five.....	3	11.5%
Six.....	1	3.8%
Eight.....	1	3.8%
Nine.....	2	7.7%
30.....	1	3.8%
Total.....	26	100.0%

	Count	Col %
Circulate GMOR for Pork		
Yes.....	14	70.0%
No.....	6	30.0%
Total.....	20	100.0%
# people circulate GMOR for Pork to		
One.....	3	21.4%
Two.....	3	21.4%
Three.....	1	7.1%
Four.....	1	7.1%
Five.....	2	14.3%
Six.....	1	7.1%
Seven.....	1	7.1%
Ten.....	1	7.1%
70.....	1	7.1%
Total.....	14	100.0%


	Count	Col %
Circulate GMOR for Beef		
Yes.....	13	65.0%
No.....	7	35.0%
Total.....	20	100.0%
# people circulate GMOR for Beef to		
One.....	2	15.4%
Two.....	3	23.1%
Three.....	3	23.1%
Four.....	1	7.7%
Five.....	2	15.4%
Six.....	1	7.7%
20.....	1	7.7%
Total.....	13	100.0%

	Count	Col %
Circulate GMOR for Contract Furniture		
Yes.....	6	42.9%
No.....	8	57.1%
Total.....	14	100.0%
# people circulate GMOR for Contract Furniture to		
One.....	2	33.3%
Two.....	3	50.0%
Six.....	1	16.7%
Total.....	6	100.0%

	Count	Col %
Circulate GMOR for Medical Devices		
Yes.....	13	52.0%
No.....	12	48.0%
Total.....	25	100.0%
# people circulate GMOR for Medical Devices to		
One.....	6	46.2%
Two.....	3	23.1%
Three.....	1	7.7%
Four.....	1	7.7%
Five.....	2	15.4%
Total.....	13	100.0%

	Count	Col %
Retain Cdn Fish & Seafood Exp. Sourcing Guide for reference		
Yes.....	63	87.5%
No.....	9	12.5%
Total.....	72	100.0%
Retain diskette Cdn Fish & Seafood Exp. Sourcing Guide for reference		
Yes.....	46	90.2%
No.....	5	9.8%
Total.....	51	100.0%
Retain hardcopy World Directory of Seafood Importers for reference		
Yes.....	56	94.9%
No.....	3	5.1%
Total.....	59	100.0%
Retain diskette World Directory of Seafood Importers for reference		
Yes.....	38	86.4%
No.....	6	13.6%
Total.....	44	100.0%
Retain Guidelines for Cdn Fish Exporters - USA for reference		
Yes.....	39	90.7%
No.....	4	9.3%
Total.....	43	100.0%
Retain Guidelines for Cdn Fish Exporters - Japan for reference		
Yes.....	43	89.6%
No.....	5	10.4%
Total.....	48	100.0%
Retain GMOR for Apparel for reference		
Yes.....	26	70.3%
No.....	11	29.7%
Total.....	37	100.0%
Retain GMOR for Oilseed for reference		
Yes.....	29	90.6%
No.....	3	9.4%
Total.....	32	100.0%
Retain GMOR for Pork for reference		
Yes.....	9	69.2%
No.....	4	30.8%
Total.....	13	100.0%
Retain GMOR for Beef for reference		
Yes.....	13	86.7%
No.....	2	13.3%
Total.....	15	100.0%
Retain GMOR for Contract Furniture for reference		
Yes.....	2	66.7%
No.....	1	33.3%
Total.....	3	100.0%
Retain GMOR for Medical Devices for reference		
Yes.....	12	92.3%
No.....	1	7.7%
Total.....	13	100.0%

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