Context, Objectives and Survey Process
Objectives of the External Client Survey

• To provide insights into the current operating environment for the ITC
• To provide insights into the performance of ITC in meeting its strategic objectives
• To identify and understand the drivers of ITC’s reputation and image
• To monitor relevance, utilization and performance of ITC products and services
• To obtain feedback for possible future ITC product and service offerings
• To track changes to the baseline on an annual basis
Respondent Recruitment

Actions taken

- Survey invitations sent by e-mail to ITC list
- Other communication included the ITC website and a paper letter enclosed with the Trade Forum
- Two reminder prompts, by e-mail to all those who had not clicked through initial invitation
- Faxed and e-mailed surveys were also accepted (approx. 15 submitted)
- Email queries about survey fielded by GlobeScan (approx. 80-100)
- Highlights report was the only incentive offered

Outcome

ITC list 49,281
(MAR 19,621 and Others 29,660)

Effective list (excluding invalid email addresses) 38,511
(MAR 18,319 and Others 20,192)

Opened e-mail 7,512
(20% percent of the effective list)
(MAR 3,861 and Others 3,651)

Completed surveys 2,017
(5% percent of the effective list and 27% percent of the emails opened)

Of the 2,017 completed surveys, 1124 are MAR and 888 are Other contact (5 are unknown).
**Client's Organization Type**

### 2008

<table>
<thead>
<tr>
<th>Organization Type</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade Support Organization (TSO)</td>
<td>25</td>
</tr>
<tr>
<td>Government ministry/mission</td>
<td>17</td>
</tr>
<tr>
<td>Micro enterprise</td>
<td>14</td>
</tr>
<tr>
<td>Large enterprise</td>
<td>10</td>
</tr>
<tr>
<td>Small enterprise</td>
<td>9</td>
</tr>
<tr>
<td>Medium enterprise</td>
<td>6</td>
</tr>
<tr>
<td>Other*</td>
<td>20</td>
</tr>
</tbody>
</table>

*“Other” organizations include: Academia / universities / research institutes (7%); Consultants (4%); Business associations / cooperatives (2%); NGOs / non-profits (2%); international organizations (1%); banks / financial institutions (1%), government (1%), rest (2%)

In 2007, 29% of responses came from TSOs and only 5% from large enterprises.

Similar profile for MAR and Other Contacts with slightly stronger government and weaker enterprise representation from MAR database.

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When viewing tracking slides, please note that data is unweighted for both years.
In 2007, 25% of responses came from Latin America and 23% from Africa.

Percentage of responses from MAR contacts higher for Latin America and lower for Africa
Country Income Levels Represented

2008

- Least developed countries: 14%
- Low / lower middle income developing countries: 52%
- Upper middle / higher income developing countries: 24%
- Developed countries: 9%

Response profile very similar to 2007

Percentage of responses from MAR contacts higher for Low/lower middle income countries and lower for LDCs
Use of Trade-Related Products and Services

2008

- Both my colleagues and I use: 32%
- I use in my work: 45%
- Colleagues use, but I do not: 5%
- Neither I nor my organization use: 12%
- Don’t know / no answer: 6%

$n=2017$

Response profile very similar to 2007

Respondents from MAR contacts are more likely to be using trade-related products and services
Familiarity with ITC and its Objectives

“Very” and “Somewhat Familiar,” by Organization Type, 2008

<table>
<thead>
<tr>
<th>Organization Type</th>
<th>Very familiar</th>
<th>Somewhat familiar</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>TSOs</td>
<td>43</td>
<td>50</td>
<td>93</td>
</tr>
<tr>
<td>Government</td>
<td>27</td>
<td>57</td>
<td>84</td>
</tr>
<tr>
<td>Large enterprises</td>
<td>13</td>
<td>60</td>
<td>73</td>
</tr>
<tr>
<td>SMEs</td>
<td>18</td>
<td>54</td>
<td>72</td>
</tr>
</tbody>
</table>

Similar responses as in 2007

n=2017
Familiarity with ITC and its Objectives

“Very” and “Somewhat Familiar,” by Region, 2008

<table>
<thead>
<tr>
<th>Region</th>
<th>Very familiar</th>
<th>Somewhat familiar</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIS / CEE</td>
<td>33</td>
<td>54</td>
<td>87</td>
</tr>
<tr>
<td>Africa</td>
<td>32</td>
<td>55</td>
<td>87</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>28</td>
<td>56</td>
<td>84</td>
</tr>
<tr>
<td>Arab States</td>
<td>32</td>
<td>49</td>
<td>81</td>
</tr>
<tr>
<td>Latin America / Caribbean</td>
<td>23</td>
<td>57</td>
<td>80</td>
</tr>
<tr>
<td>North America / Australia / New Zealand / Japan</td>
<td>23</td>
<td>55</td>
<td>78</td>
</tr>
<tr>
<td>EU / EFTA</td>
<td>23</td>
<td>54</td>
<td>77</td>
</tr>
</tbody>
</table>

n=2017
Greatest Challenge to Developing Exports from Client’s Country/Company

Unprompted, Combined Mentions, 2008

- Lack of / access to market information: 21
- Non-tariff barriers (regulations, standards, etc.): 20
- Obtaining financing / attracting investment: 15
- Marketing/communications (finding buyers/contacts): 14
- Market access / protectionism, in general: 12
- Production capacity / productivity: 12
- Competitiveness/sustainability of the business: 11
- Government policies / lack of government support: 11
- Product/service development (innovation, quality, etc.): 11
- Human resources (expertise, availability, etc.): 10
- Logistical issues, other than transport: 8
- Transport issues: 8

Relatively similar responses as in 2007 – Note that LDCs have higher than average mention of non-tariff barriers, obtaining finance and production capacity.

Note: Challenges mentioned by 6% or fewer respondents are not included in the chart.

n=2017
Greatest Challenge to Developing Exports
from Client’s Country/Company

Top Mentions by Organization Type, 2008

**TSO Respondents:**
- Lack of / access to market information
  - Obtaining financing / attracting investment
- Non-tariff barriers (regulations, standards, etc.)

**Government Respondents:**
- Non-tariff barriers (regulations, standards, etc.)
- Lack of / access to market information
  - Production capacity / productivity

**Large Enterprise Respondents:**
- Non-tariff barriers (regulations, standards, etc.)
  - Transport issues
  - Logistical issues other than transport

**SME Respondents:**
- Marketing/communications (finding buyers/contacts)
- Lack of / access to market information
- Non-tariff barriers (regulations, standards, etc.)
Greatest Challenge – Verbatim Comments

Lack of / access to market information:
- “Absence of export related structured statistical, foreign market/s data”
- “Conocimiento de la demanda efectiva del mercado potencial de destino”
- “Insufficient market information”

Non-tariff barriers (regulations, standards, etc.):
- “Compliance to non-tariff measures”
- “Meeting sanitary and other standards of international market”
- “There is no Egyptian law for Organic Agriculture equivalent with EU Reg. EEC 2092/9”

Obtaining financing / attracting investment:
- “Finding enough and lower cost financing for working capital”
- “Limited funding for market development programmes. It is costly to promote traders and their products internationally, hence tend to prioritise market development activities.”
- “Inadequate levels of investment and support”
Overall Performance of ITC on Strategic Objectives

Note: Data used to compare 2007 and 2008 results are not weighted
Overall Rating of ITC for Helping Organization Achieve Positive Results in Export Development

2007–2008

Note:
Calculations based on raw responses for both years.
The white space in this chart represents “don’t know” and no answer.
Rating scale from 1 to 5 where 1 is “poor” and 5 is “excellent.”

The white space in this chart represents “don’t know” and no answer.
Rating scale from 1 to 5 where 1 is “poor” and 5 is “excellent.”
Overall Rating of ITC for Helping Organization Achieve Positive Results in Export Development

By Organization Type, 2008

<table>
<thead>
<tr>
<th></th>
<th>Positive (4+5)</th>
<th>Neutral (3)</th>
<th>Negative (1+2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TSOs</td>
<td>59</td>
<td>21</td>
<td>9</td>
</tr>
<tr>
<td>Government</td>
<td>47</td>
<td>29</td>
<td>10</td>
</tr>
<tr>
<td>SMEs</td>
<td>35</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td>Large enterprises</td>
<td>30</td>
<td>23</td>
<td>11</td>
</tr>
</tbody>
</table>

The white space in this chart represents "don't know" and no answer. Rating scale from 1 to 5 where 1 is "poor" and 5 is "excellent."

Improved in perception since 2007 with the exception of large enterprises

Responses from Other contacts slightly more critical

*n=2017*
Overall Rating of ITC for Helping Organization Achieve Positive Results in Export Development

By Region, 2008

The white space in this chart represents "don't know" and no answer. Rating scale from 1 to 5 where 1 is "poor" and 5 is "excellent."

Perceptions have slightly improved in all regions since 2007

n=2017
Rating ITC in Supporting TSOs

2008

Rating on ‘improving interactions with policy-makers’ has improved significantly since 2007

Responses from Other contacts slightly more critical

The white space in this chart represents “don’t know” and no answer.
Rating scale from 1 to 5 where 1 is “poor” and 5 is “excellent.”
Subsample: TSO respondents (n=501)
Rating ITC in Supporting Government Organizations/Departments

2008

<table>
<thead>
<tr>
<th>Statement</th>
<th>Positive (4+5) %</th>
<th>Neutral (3) %</th>
<th>Negative (1+2) %</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better understanding the private sector’s interests in trade negotiations</td>
<td>38</td>
<td>23</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>Incorporating export development issues into national development policy</td>
<td>33</td>
<td>23</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>Developing contacts between public/private sectors on trade development issues</td>
<td>31</td>
<td>23</td>
<td>13</td>
<td>15</td>
</tr>
</tbody>
</table>

The white space in this chart represents "don't know" and no answer. Rating scale from 1 to 5 where 1 is "poor" and 5 is "excellent."
Subsample: Government respondents (n=336)

Clients have a more positive perception than in 2007
Responses from MAR contacts slightly more critical
Rating ITC in Supporting Businesses

2008

<table>
<thead>
<tr>
<th>Category</th>
<th>Positive (4+5)</th>
<th>Neutral (3)</th>
<th>Negative (1+2)</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving export strategy</td>
<td>38</td>
<td>20</td>
<td>9</td>
<td>16</td>
</tr>
<tr>
<td>Improving competitiveness in international markets</td>
<td>35</td>
<td>19</td>
<td>12</td>
<td>16</td>
</tr>
<tr>
<td>Increasing actual exports</td>
<td>26</td>
<td>21</td>
<td>14</td>
<td>18</td>
</tr>
</tbody>
</table>

The white space in this chart represents "don't know" and no answer. Rating scale from 1 to 5 where 1 is "poor" and 5 is "excellent."

Subsample: Enterprise and TSO respondents (n=1274)

Clients have a more positive perception than in 2007
Perceptions of ITC
Why Organization Named is the Most Important for Trade-Related Services

2008

<table>
<thead>
<tr>
<th>Reason</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Products / advisory support most relevant to my needs</td>
<td>35</td>
</tr>
<tr>
<td>Main/only organization I know</td>
<td>19</td>
</tr>
<tr>
<td>Products / advisory support are better than alternatives</td>
<td>15</td>
</tr>
<tr>
<td>Easy to find products/services I need</td>
<td>12</td>
</tr>
<tr>
<td>People are well-informed/helpful</td>
<td>7</td>
</tr>
<tr>
<td>Helps me find other useful contacts</td>
<td>5</td>
</tr>
<tr>
<td>Local presence</td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>6</td>
</tr>
</tbody>
</table>

Answers very similar to 2007

*Subsample: Those who name ITC as their organization's most important provider of trade-related services (n=412)

**Subsample: Those who name an organization other than ITC as their most important provider of trade-related services (n=1038)
Awareness, Use and Ratings of ITC Products/Services
Impact of ITC Products and Services

2008

- Positive (4+5) 43%
- Neutral (3) 24%
- Negative (1+2) 15%

Have given organization tools/skills to train others

- Positive (4+5) 42%
- Neutral (3) 30%
- Negative (1+2) 15%

Have given organization tools/skills to advance without assistance

- Positive (4+5) 35%
- Neutral (3) 23%
- Negative (1+2) 20%

ITC has provided access to technical assistance from other sources

The white space in this chart represents “don’t know” and no answer.
Subsample: those whose organizations use ITC products/services

n=1475
Use vs Practicality Ratings for ITC Products / Services

2008

Note: Survey did not include Trade Map
ITC’s Strengths and Weaknesses in Delivery
Performance of ITC by Aspect of Service


- **Being transparent**: 57% in 2008 (n=1475), 56% in 2007 (n=1063)
- **Working efficiently**: 62% in 2008, 56% in 2007
- **Supporting use of its products/services**: 54% in 2008, 48% in 2007
- **Long-term perspective on export development**: 52% in 2008, 51% in 2007
- **Offering integrated solutions**: 47% in 2008, 36% in 2007
- **Designing services specifically to meet needs**: 41% in 2008, 36% in 2007
- **Understanding your organization’s needs**: 44% in 2008, 40% in 2007
- **Following up on impact of products/services**: 40% in 2008, 34% in 2007

Rating scale from 1 to 5 where 1 is “poor” and 5 is “excellent”

Offering of programmes of scale (41%) and responsiveness (45%) not asked in 2007.
Preferences and Ideas for Future Products and Services
New Products and Services Suggested by Respondents for ITC

Unprompted, Combined Mentions, 2008

Most mentions for training and trade intelligence as in 2007

- Capacity building / training: 21%
- Market studies / trade intelligence (in general): 15%
- Consulting/support services: 10%
- Commodity/product-specific information: 9%
- Country/region-specific information: 8%
- More up-to-date/accurate information: 8%
- Change in strategic emphasis (e.g. more for SMEs): 7%
- Data/statistics/forecasts: 7%
- Directory of potential partners/customers: 6%
- Networking / export-buyer matching: 6%
- Develop/improve trade/product/investment maps: 4%
- Direct/indirect financial assistance: 4%
- Information on trade law: 4%
- Sectoral information (in general): 4%

Note: Products/services mentioned by 3% or fewer respondents are not included in the chart.

n=1774
New Product/Service Suggestions: Verbatim Comments

Capacity building / training:
- “Integrated holistic training modules”
- “SCM training in a learning-by-doing way, acting on an actual supply chain (through all companies)”
- “Training on writing of business plans for small and medium size business”

Market studies / trade intelligence (in general):
- “Indicateurs comparés du commerce international”
- “Consumer behavior analysis (B2B & B2C)”
- “Trade analysis, e.g. emerging trends”

Consulting/support services:
- “More environment-related technical assistance in the trade/export arena for developing countries”
- “In-country consulting services on business management development”
- “Ongoing advisory [services] - we need advice to improve the processes of work in Iranian TPOs, motivate staff and empowerment, pragmatism in foreign trade relations”
Future Role for ITC

“Very Important,” by Organization Type, 2008

Responses similar to 2007 with slightly diminished future role for ITC