ITC Clients’ Perceptions Survey 2007

10 December 2007
Agenda

• Context, objectives and survey process
• Key highlights from the survey results
• High level conclusions
Context, Objectives and Survey Process
Background

- In 2004, the International Trade Centre undertook an extensive evaluation of its operations.

- In response to the outcome of this evaluation ITC initiated a change management process, under new leadership, to implement the recommendations.

- This process is multi-faceted, with internally and externally focused initiatives targeting strategy, products and services, internal operations and communications, etc.

- The ITC External Clients Survey is one of the initiatives in the review and aims to identify how ITC is perceived by their different client groups, regions etc.
Objectives of the External Clients Survey

- To provide insights into the current macro and micro operating environment for the ITC
- To develop a targeted marketing strategy, plan and programme to achieve ITC’s strategic objectives
- To identify and understand the drivers of ITC’s brand/reputation and image
- To monitor relevance, utilization and performance of ITC products and delivery modes
- To obtain feedback for future ITC product and programme offerings
The Structure of External Clients Survey

• The survey was structured around five main sections:
  − Introduction and respondent profile (9 questions)
  − Awareness and appraisal of the ITC (6 questions)
  − Use, relevance and value of the ITC services (16 questions)
  − Future of ITC Services (4 questions)
  − Close (2 questions)

• Total of 37 questions, including 6 open answer questions

• Survey live from Sept 25 to Oct 18, in three languages (English, French and Spanish) online, accessible through ITC’s website
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
- Reminder prompt, by e-mail to all those who had not clicked through initial invitation
- Second reminder e-mail sent by ITC
- Follow up phone calls by GlobeScan to clients in target countries (Oct. 15-17)
- Follow up by GlobeScan with ITC desk officers in target countries
- Internal efforts by ITC to encourage participation throughout field period
- Faxed and e-mailed surveys were also accepted (approx. 30 submitted)
- Highlights report was the only incentive offered

**Outcome**
- ITC list: 25,091
- Effective list (excluding invalid and non personal email addresses): 15,300
- Opened e-mail: 3,400 (22% percent of the effective list)
- Completed surveys: 1,537 (10% percent of the effective list and 45% percent of the emails opened)
Highlights from Survey Results
# Framework for Presenting Results

<table>
<thead>
<tr>
<th>Section</th>
<th>Related Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respondent Profile</td>
<td>N/A</td>
</tr>
<tr>
<td>International Trade Environment</td>
<td>To provide insights into the current macro and micro operating environment for the ITC</td>
</tr>
<tr>
<td>Overall Performance of ITC on Strategic Objectives</td>
<td>To develop a targeted marketing strategy, plan and programme to achieve ITC’s strategic objectives</td>
</tr>
<tr>
<td>Perceptions of ITC</td>
<td>To identify and understand the drivers of ITC’s brand/reputation and image</td>
</tr>
<tr>
<td>Awareness, Use and Ratings of ITC Products and Services</td>
<td>To monitor relevance, utilization and performance of ITC products</td>
</tr>
<tr>
<td>ITC’s Strengths and Weaknesses in Delivery</td>
<td>To monitor relevance, utilization and performance of ITC delivery modes</td>
</tr>
<tr>
<td>Preferences and Ideas for Future Products and Services</td>
<td>To obtain feedback for future ITC product and programme offerings</td>
</tr>
</tbody>
</table>
### Client's Organization Type

<table>
<thead>
<tr>
<th>Organization Type</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade Support Organization (TSO)</td>
<td>29</td>
</tr>
<tr>
<td>Small company</td>
<td>22</td>
</tr>
<tr>
<td>Government ministry/mission</td>
<td>15</td>
</tr>
<tr>
<td>Large company</td>
<td>5</td>
</tr>
<tr>
<td>Medium size company</td>
<td>5</td>
</tr>
<tr>
<td>Other*</td>
<td>23</td>
</tr>
</tbody>
</table>

*Notes:*
- Most TSO’s are trade promotion organisations and chambers of commerce
- Government respondents are mainly Departments of Trade and Industry

* "Other“ organizations include:
  - Academia / universities / research institutes (6%); Consultants (4%);
  - Business associations / cooperatives (2%); NGOs / non-profits (2%);
  - international organizations (1%); banks / financial institutions (1%).
Role in Selecting Trade-Related Products and Services

Don’t know / no answer (2)
No influence in selection process (7)
Have influence, but not principal decision-maker (42)
One of the principal decision-makers (49)

n=1323
Familiarity with ITC and its Objectives

Don’t know / no answer (3)
Not at all familiar (16)
Somewhat familiar (52)
Very familiar (29)

n=1537
Greatest Challenges to Developing Exports from Client's Country/Company

Unprompted, Total Mentions

- Product development / innovation / quality control: 18%
- Trade barriers: 16%
- Lack of / access to market information: 14%
- Market identification, access: 13%
- Export financing: 11%
- Human resource development: 10%
- Constraints on production / supply chains / logistics: 9%
- Global competition: 9%
- Increasing transaction costs: 9%
- Lack of infrastructure: 7%
- Lack of support from gov’t / other organizations: 6%
- Business environment: 5%
- Marketing: 5%
- Country’s reputation: 4%
- Currency / exchange:

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

n=1537
Greatest Challenges to Developing Exports from Client's Country/Company

Respondents from LDCs, Unprompted, Total Mentions

- **Product development / innovation / quality control**: 22%
- **Export financing**: 15%
- **Trade barriers**: 15%
- **Human resource development**: 14%
- **Lack of / access to market information**: 14%
- **Increasing transaction costs**: 11%
- **Lack of infrastructure**: 11%
- **Constraints on production / supply chains / logistics**: 9%
- **Market identification/access**: 9%
- **Marketing**: 6%

Note: Challenges mentioned by 5% or fewer respondents are not included in the chart.

$n=246$
Overall Performance of ITC on Strategic Objectives
Overall Rating of ITC for Helping Organization Achieve Positive Results in Export Development

Don't know / no answer (22)
Neutral (3) (24)
Negative (1 and 2) (16)
Positive (4 and 5) (38)

% n=1537
Overall Rating of ITC for Helping Organization Achieve Positive Results in Export Development

By Geographic Region

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

n=1537
Overall Rating of ITC for Helping Organization Achieve Positive Results in Export Development

By Organization Type

The white space in this chart represents “don’t know” or no answer. Rating scale from 1 to 5, where 1 is “poor” and 5 is “excellent.”

n=1537
Overall Rating of ITC for Helping Organization Achieve Positive Results in Export Development

By Familiarity with ITC

<table>
<thead>
<tr>
<th>Familiarity</th>
<th>Positive (4 and 5)</th>
<th>Neutral (3)</th>
<th>Negative (1 and 2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very familiar</td>
<td>60</td>
<td>24</td>
<td>9</td>
</tr>
<tr>
<td>Somewhat familiar</td>
<td>36</td>
<td>28</td>
<td>18</td>
</tr>
<tr>
<td>Not at all familiar</td>
<td>8</td>
<td>12</td>
<td>23</td>
</tr>
</tbody>
</table>

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

n=1537
Rating ITC in Supporting TSOs

<table>
<thead>
<tr>
<th>Subsample: TSO respondents</th>
<th>n=446</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strengthening internal operations/functions</strong></td>
<td></td>
</tr>
<tr>
<td>Positive (4 and 5)</td>
<td>28</td>
</tr>
<tr>
<td>Neutral (3)</td>
<td>17</td>
</tr>
<tr>
<td>Negative (1 and 2)</td>
<td>13</td>
</tr>
<tr>
<td>Not applicable</td>
<td>28</td>
</tr>
<tr>
<td><strong>Improving services to constituencies/clients</strong></td>
<td></td>
</tr>
<tr>
<td>Positive (4 and 5)</td>
<td>47</td>
</tr>
<tr>
<td>Neutral (3)</td>
<td>21</td>
</tr>
<tr>
<td>Negative (1 and 2)</td>
<td>9</td>
</tr>
<tr>
<td>Not applicable</td>
<td>13</td>
</tr>
<tr>
<td><strong>Improving lobbying with trade policy-makers</strong></td>
<td></td>
</tr>
<tr>
<td>Positive (4 and 5)</td>
<td>28</td>
</tr>
<tr>
<td>Neutral (3)</td>
<td>16</td>
</tr>
<tr>
<td>Negative (1 and 2)</td>
<td>15</td>
</tr>
<tr>
<td>Not applicable</td>
<td>22</td>
</tr>
</tbody>
</table>

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

Subsample: TSO respondents
### Rating ITC in Supporting Government Organizations/Departments

The white space in this chart represents "don't know" or no answer.
Rating scale from 1 to 5, where 1 is “poor” and 5 is “excellent.”
Subsample: Government respondents

<table>
<thead>
<tr>
<th>Area of Rating</th>
<th>Positive (4 and 5)</th>
<th>Neutral (3)</th>
<th>Negative (1 and 2)</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incorporating export development issues into national development policy</td>
<td>27</td>
<td>17</td>
<td>10</td>
<td>15</td>
</tr>
<tr>
<td>Developing contacts between public/private sectors on trade development issues</td>
<td>28</td>
<td>18</td>
<td>13</td>
<td>17</td>
</tr>
<tr>
<td>Better understanding the private sector’s interests in trade negotiations</td>
<td>29</td>
<td>17</td>
<td>13</td>
<td>16</td>
</tr>
</tbody>
</table>

\( n=235 \)
Rating ITC in Supporting Businesses

The white space in this chart represents “don’t know” or no answer.
Rating scale from 1 to 5, where 1 is “poor” and 5 is “excellent.”
Subsample: Large, medium and small company respondents

Positive (4 and 5) Neutral (3) Negative (1 and 2) Not applicable

Improving export strategy
24 18 18 17

Improving competitiveness in international markets
21 18 21 16

Increasing actual exports
17 16 25 18

n=497
### The Top Descriptors Used for ITC

<table>
<thead>
<tr>
<th>Descriptor</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informative</td>
<td>111</td>
</tr>
<tr>
<td>Helpful</td>
<td>69</td>
</tr>
<tr>
<td>International/Global</td>
<td>69</td>
</tr>
<tr>
<td>Trade</td>
<td>52</td>
</tr>
<tr>
<td>Useful</td>
<td>52</td>
</tr>
<tr>
<td>Supportive</td>
<td>52</td>
</tr>
<tr>
<td>Efficient</td>
<td>27</td>
</tr>
<tr>
<td>Comprehensive</td>
<td>22</td>
</tr>
<tr>
<td>Innovative</td>
<td>21</td>
</tr>
<tr>
<td>Professional</td>
<td>21</td>
</tr>
<tr>
<td>Focused</td>
<td>20</td>
</tr>
<tr>
<td>Good</td>
<td>18</td>
</tr>
<tr>
<td>Proactive</td>
<td>15</td>
</tr>
<tr>
<td>Bureaucratic</td>
<td>15</td>
</tr>
<tr>
<td>Effective</td>
<td>15</td>
</tr>
</tbody>
</table>

Note: Preliminary and based on English responses only

$n=1537$
Most Important Organizations Used for Trade-Related Services

Unprompted, First Mention

Note: The total of the other organizations is 21%. Organizations mentioned by fewer than 2% of respondents are not included in the chart.

n=1323
Why ITC is the Respondents’ Most Important Source for Trade Related Services

Subsample: Those respondents who name ITC as their organization’s most important provider of trade-related services at Q29.

- Product/advisory support most relevant to my needs: 34%
- It is the main/only organization I know: 22%
- Product/advisory support better than alternatives: 15%
- Easy to find products/services that I need: 11%
- Helps me find other useful contacts: 6%
- People are well informed/helpful: 6%
- Local presence/office in my country: 2%
- Other: 3%

n=366
Why Other Organizations Named are the Most Important for Trade Related Services

<table>
<thead>
<tr>
<th>Reason</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product/advisory support most relevant to my needs</td>
<td>28</td>
</tr>
<tr>
<td>Local presence / office in my country</td>
<td>15</td>
</tr>
<tr>
<td>It is the main/only organization I know</td>
<td>15</td>
</tr>
<tr>
<td>Easy to find products/services that I need</td>
<td>9</td>
</tr>
<tr>
<td>Helps me find other useful contacts</td>
<td>8</td>
</tr>
<tr>
<td>Product/advisory support better than alternatives</td>
<td>7</td>
</tr>
<tr>
<td>People are well informed/helpful</td>
<td>6</td>
</tr>
<tr>
<td>Other</td>
<td>11</td>
</tr>
</tbody>
</table>

Subsample: Those respondents who named an organization other than ITC as their organization’s most important provider of trade-related services at Q29.
Awareness, Use and Ratings of ITC Products/Services
Products / Services That Have the Highest and Lowest Use as a Percentage of Awareness

Most-Used Products for Awareness Level:

- International Trade Forum ITC Magazine (59%)
- Trade Map (57%)
- Product Map (51%)
- E-trade publications (45%)
- Market Access Map (MACMAP) (44%)

Least-Used Products for Awareness Level:

- MLS on International Procurement and Supply Chain Management (7%)
- Export-led Poverty Reduction Programme (11%)
- Women exporters training manuals (13%)
- Finance for Trade (13%)
- Certified trade advisors programme (13%)  

n=1063
ITC’s Strengths and Weaknesses in Delivery
Performance of ITC by Area

<table>
<thead>
<tr>
<th>Area</th>
<th>Positive (4 and 5)</th>
<th>Neutral (3)</th>
<th>Negative (1 and 2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working efficiently</td>
<td>62</td>
<td>21</td>
<td>5</td>
</tr>
<tr>
<td>Being transparent</td>
<td>56</td>
<td>18</td>
<td>8</td>
</tr>
<tr>
<td>Long-term perspective for export development</td>
<td>52</td>
<td>23</td>
<td>8</td>
</tr>
<tr>
<td>Providing website that meets needs</td>
<td>50</td>
<td>22</td>
<td>11</td>
</tr>
<tr>
<td>Supporting use of its products/services</td>
<td>48</td>
<td>25</td>
<td>11</td>
</tr>
<tr>
<td>Timely delivery of products/services</td>
<td>44</td>
<td>22</td>
<td>10</td>
</tr>
<tr>
<td>Understanding your organization’s needs</td>
<td>44</td>
<td>26</td>
<td>13</td>
</tr>
<tr>
<td>Making you aware of relevant offerings</td>
<td>39</td>
<td>27</td>
<td>22</td>
</tr>
<tr>
<td>Combining products/services to offer integrated solutions</td>
<td>36</td>
<td>25</td>
<td>13</td>
</tr>
<tr>
<td>Designing services specifically to meet needs</td>
<td>36</td>
<td>23</td>
<td>19</td>
</tr>
<tr>
<td>Following up on impact of products/services</td>
<td>34</td>
<td>22</td>
<td>17</td>
</tr>
</tbody>
</table>

The white space in this chart represents "don't know" or no answer. Rating scale from 1 to 5, where 1 is “poor” and 5 is “excellent”
Importance vs Performance on Key Aspects of Service

Focus
- Developing services to meet needs
- Making you aware of offerings
- Understanding needs
- Offering integrated solutions

High Leverage
- Supporting use of products
- Working efficiently
- Long-term perspective
- Being transparent
- Website meets needs
- Timely delivery

Importance vs Performance

n=1063

Dalberg
Preferences and Ideas for Future Products and Services
New Products and Services Suggested by Respondents for ITC

Unprompted, Total Mentions

- Trade intelligence: 22%
- Training: 17%
- Financial assistance: 9%
- Information on specific commodity: 9%
- New web-based services: 7%
- Trade promotion: 7%
- Export-buyer matching: 6%
- Marketing strategies: 6%
- Technical/consulting support: 6%
- Directory of importers/exporters: 5%
- Logistics/transportation/packaging: 5%
- Best practices' or 'how to' guides: 4%
- Emerging products/companies/markets: 4%
- Market research: 4%

Note: Products/services mentioned by fewer than 4% of respondents are not included in the chart.

n=1537
New ITC Products/Services that Would Most Help in Meeting Organization's Needs

- Market entry and development: 50%
- Integrated trade intelligence: 40%
- Branding strategies for exporters: 38%
- Attracting foreign investment: 34%
- Training for trade development professionals: 34%
- "Green" production and trade: 33%
- Fellowship programme for trade support professionals: 30%
- Cross-cultural negotiation skills: 27%
- Annual flagship publication on export competitiveness: 17%
- ITC benchmarking scheme: 14%

n=1537
High level conclusions
High level conclusions

• Overall rating of ITC’s performance is moderately positive, and ITC is viewed as being informative and helpful.

• Clients do not rate ITC highly enough in achieving ITC’s own stated objectives for its work with them.

• ITC is considered efficient in serving clients, but not good at engaging clients to identify needs and tailor solutions – which are the most important factors in overall performance.