

International Business and Exporting Survey

**A survey of Western New York companies to
identify current export activities, need for
information and training, and interest in use of
the Internet.**

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Table of Contents

Executive Summary	
Introduction to the Survey	1
Survey Results	2
Current level of international involvement	2
Plans for exporting during the next 12 months	3
Importance of export sales in total sales activity	3
Countries and regions for exporting	4
Competition for company's major products within the U.S.	5
Factors in competitive advantage in international markets	6
Involvement with strategic alliances	7
Primary goals of the strategic alliances	7
Impact of NAFTA on company's exports	8
U.S. government response to the threat of imports	8
Interest in obtaining information about international business	9
World Wide Web site	11
Goals of the World Wide Web site	12
Success of company World Wide Web site	13
Select comments on training and information needs	14
Appendix A: Methodology	16
Appendix B: Sample Characteristics	17
Appendix C: Questionnaire	19

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Executive Summary

This report presents the results of a mail survey sent to a sample of Western New York companies involved in exporting. The major objective of this survey is to gather information about area exporters in order to assess their needs for information and training programs and their interest in use of the Internet.

- In their approach to international business, most companies use direct exporting (80%) or an overseas distributor (49%).
- About two-thirds of the companies plan to increase exports within the next year.
- About three out of five exporters identify international sales as a very or an extremely important component of their total sales.
- The major markets for exporting (cited by at least 40% of the respondents) are Canada, Europe (United Kingdom, Germany), Mexico, Latin American, Southeast Asia, and Japan.
- The companies' dominant sources of competitive advantage in international markets are (in rank order) product quality, pricing, customer service, delivery, and product features.
- Twenty-four percent of the companies are involved in strategic alliances. The primary goal of the strategic alliance is development of a distribution system.
- Eighty percent of companies see little impact from NAFTA on their volume of exports.
- The companies prefer to have either no limits on imports (27%) or some limits to ensure fair competition (67%).
- The major interest areas for information and training about international business and exporting are (in rank order): identify markets for products, marketing, foreign regulations and requirements, legal framework and regulations, documentation for exports, and trade shows.
- Fifty-eight percent of all companies in the sample have a World Wide Web site.
- The most important goals of the Web site (in rank order) are to provide information about products, information about the company, advertising, and product sales.
- In general, companies see their Web site as moderately successful at meeting its goals (70%).

Introduction to the Survey

The International Business and Exporting Survey is an activity of the Business & International Education Program (B&IE) of the Business Department at Buffalo State College. The B&IE is a two-year project funded by the U.S. Department of Education (Grant # P153A70017-97). A major goal of the B&IE Program is to provide assistance and support to promote exporting by area companies.

The major objective of this survey is to gather information about area exporters and to assess their needs for information and training programs. The questionnaire includes questions about the current level of exporting, export markets, relative importance of export sales, interest in specific types of information, interest in training programs, level of use of the Internet, and questions related to the impact of imports and NAFTA on sales. The survey was mailed to Western New York companies identified on a mailing list as engaging in exporting. This report presents the responses to the questionnaire. A discussion of the survey methodology is presented in Appendix A and a description of the sample is in Appendix B. There were 119 responses to the survey for a response rate of 27%.

Survey Results

Current level of international involvement

Western New York companies use a variety of approaches to international business. The two used most widely are direct exporting (80%) and use of an overseas distributor or agent (49%). Only 19% of companies conduct indirect exporting through a U.S.-based export management company or export trading company. Relatively few companies report direct involvement in international markets with 4% licensing overseas production, 11% engaged in an international joint venture, and 11% with direct ownership of an overseas production facility.

Table 1: Level of international involvement

	N	Percent*
Indirect exporting	20	19
Direct exporting	84	80
Overseas distributor	51	49
License overseas production	4	4
Joint venture	12	11
Direct ownership	12	11
Total	105	

*Percent is based on the total number of companies responding to this multiple-response question.

Plans for exporting during the next 12 months

Over two-thirds of the companies currently engaged in exporting plan to increase their exports within the next year and 31% intend to remain at about the same level. Among the companies that do not currently export, only one firm has plans to begin to export within the next 12 months.

Table 2: Plans for exporting

	N	Percent
Decrease exports	1	1
Stay about the same	33	31
Increase exports	72	68
Total	106	100

Importance of export sales in total sales activity

Among the companies that actively engage in international commerce, a majority (59%) identify international sales as either an extremely or a very important component of their sales. One-fourth of the companies see international sales as somewhat important and only 16% rate these sales as not very or not at all important.

Table 3: Importance of international sales as a part of total sales activity

	N	Percent
Not at all important	3	3
Not very important	13	13
Somewhat important	26	25
Very important	46	44
Extremely important	16	15
Total	104	100

Countries and regions for exporting

Table 4 presents a list of countries and regions to which companies export. The table includes only locations cited at least two times by respondents. Locations cited only once are: Pakistan, Hong Kong, Ireland, Switzerland, Egypt, Taiwan, Singapore, and Malaysia. The top 10 on the list of locations in Table 4 were also cited as the most important countries or regions for exporting.

Table 4: Countries and regions for exports

	N	Percent*
Canada	96	90
Europe	71	66
United Kingdom	53	50
Mexico	51	48
Germany	51	48
Latin America	50	47
Southeast Asia	46	43
Japan	43	40
China	29	27
South Asia	27	25
Australia	14	13
Middle East	7	7
Africa	6	6
South Africa	5	5
New Zealand	4	4
India	4	4
Italy	3	3
Brazil	3	3
South America	3	3
Israel	2	2
Pacific Rim	2	2
Saudi Arabia	2	2
Russia	2	2
Korea	2	2
Total	107	

*Percent is based on the total number of companies responding to this multiple-response question.

Competition from imports for company's major products within the U.S.

There is no consistent pattern among the companies with respect to their view of the level of competition from imports for their major products within the United States. About one in five (21%) perceive substantial competition and an additional 24% rate the competition as moderate. However, 41% see little competition and 14% find no competition at all from imports.

Table 5: Direct competition from imports in the U.S.

	N	Percent
No competition from imports	15	14
Little competition from imports	44	41
Moderate competition from imports	26	24
Substantial competition from imports	22	21
Total	107	100

Factors in competitive advantage in international markets

Companies rated a series of factors in terms of their relative contribution to the competitiveness of their products in international markets. The factors were rated using a five-point scale in which 1 = not at all important and 5 = extremely important. In rank order, mean response is shown in Table 6. Product quality, pricing, and customer service are clearly the key factors.

**Table 6: Factors in competitive advantage
(Rank order)**

Factor	Mean	N
Product quality	4.40	104
Pricing	4.17	104
Customer service	4.11	103
Delivery	3.98	103
Product features	3.81	99
Marketing	3.74	101
Technology	3.71	100
Distribution	3.66	99
Labor cost	3.21	100
Financing	2.80	100

Table 7 presents the percentage responses for each of the factors. The percentage of responses in the extremely important category for product quality (52%), customer service (40%), and pricing (42%) again indicates the centrality of these factors for area exporters.

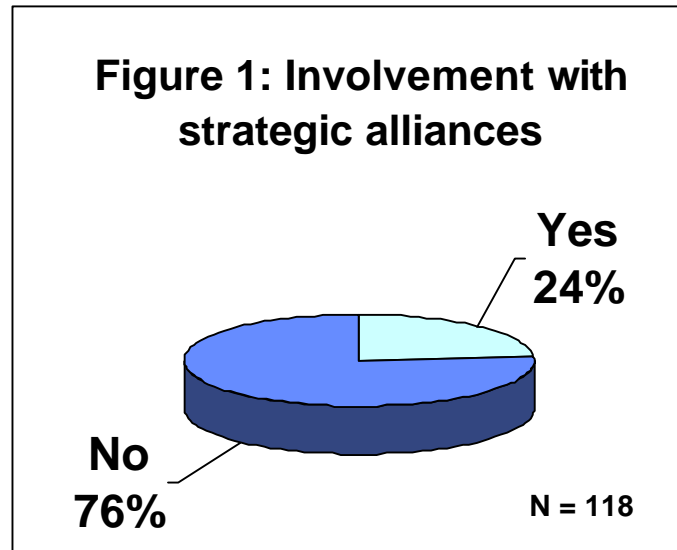
Table 7: Factors in competitive advantage (Percent)

	Not at all important	Not very important	Somewhat important	Very important	Extremely important	Total*
Marketing	2	12	22	39	26	101
Product quality	0	3	6	39	52	100
Distribution	1	11	29	38	20	99
Labor cost	2	27	31	28	12	100
Product features	1	9	20	47	22	99
Technology	3	13	23	32	29	100
Customer service	0	6	17	37	40	100
Pricing	0	2	21	35	42	100
Delivery	1	5	24	35	35	100
Financing	13	32	25	22	8	100

*Totals may not add to 100% due to rounding.

Involvement with strategic alliances

One in four of the Western New York companies in the survey are involved in a strategic alliance or non-equity cooperative venture with a foreign company. Figure 1 shows that 28 companies (24%) have such an involvement.



Primary goals of the strategic alliance

There is usually more than one reason for entering into an alliance with an overseas company. Table 8 shows that for 79% of the companies involved in a strategic alliance, the primary reason is to develop a distribution system. In addition, 38% of companies cite their involvement as a means of avoiding overseas investment and 29% use an alliance for the purpose of sharing knowledge derived from research and development.

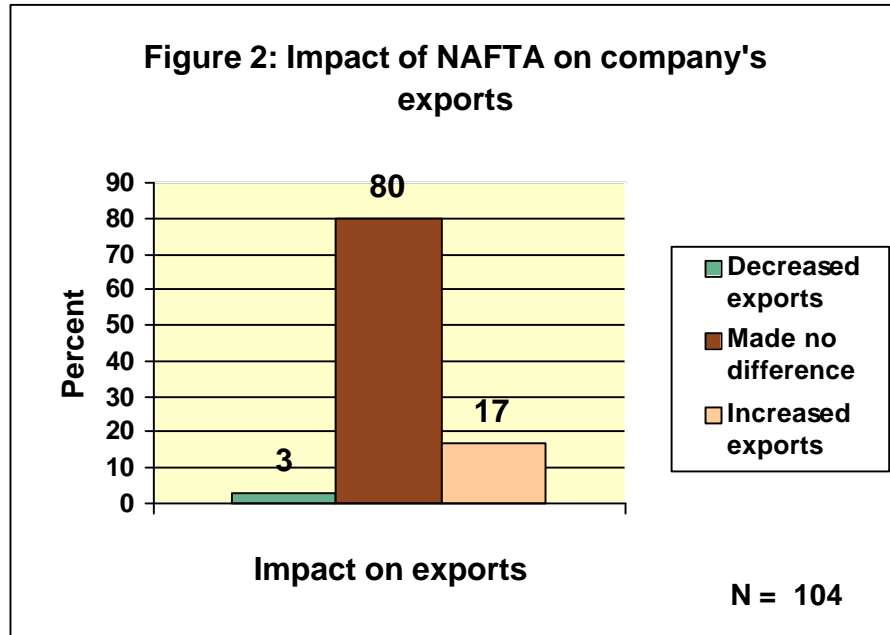
Table 8: Primary goals of strategic alliance

	N	Percent*
Sharing research and development knowledge	7	29
Development of a distribution system	19	79
Avoid risk of overseas investment	9	38
Total	24	

*Percent is based on the total number of companies responding to this multiple-response question.

Impact of NAFTA on company's exports

The companies see little impact from NAFTA on their export activities. Only 3% state that NAFTA resulted in a decrease in their export level compared to 17% that believe NAFTA led to an increase in exports. For 80% of the respondents, NAFTA made no difference in their export activities.



U.S. government response to the threat of imports to firms in your industry

The companies prefer to have either no limits on imports in order to promote competitiveness (27%) or some limits to ensure fair competition (67%). Only 6% would like to see strict limits to protect U.S. industry.

Table 9: How government should respond to threat of imports

	N	Percent
Place no limits on imports to force U.S. companies to be competitive	31	27
Place some limits on imports to ensure that there is fair competition	76	67
Place strict limits on imports to protect U.S. companies	7	6
Total	114	100

Interest in obtaining information and/or training about

international business and exporting

Respondents indicated their interest in a series of topics related to international business and exporting. The topics were rated using a five-point scale in which 1 = not at all interested and 5 = extremely interested. In rank order, by mean response, the topics are:

Table 10: Training topics of interest

Topics	Mean	N
Identify markets for your products	3.62	99
Marketing	3.33	99
Foreign regulations and requirements	3.21	98
Legal framework and regulations	3.09	97
Documentation for exports	2.99	98
Trade shows	2.86	96
International pricing	2.85	97
U.S. government export controls	2.82	97
Sales forecasting	2.73	96
Regional and national culture	2.57	96
Export financing	2.55	98
Trade missions	2.53	97
Language	2.53	98
Exchange rates	2.46	96
International management	2.44	96
Human resource management	2.15	97

The companies are clearly concerned with learning about markets for their products, marketing, and in acquiring information about practical issues related to market development including regulations, legal issues, and documentation. There is much less interest in language, culture, and management.

It should be noted that the companies in the sample do not show great interest in obtaining information or training in any of these areas. The highest mean response for any topic is only 3.62 on a 5-point scale. Table 11 shows the percentage of responses to the topics. It should be noted that only with the topic "identify markets for your products" did more than 50% respond that they were either very interested or extremely interested. In contrast, 50% or more indicated that they were not at all or not very interested in export financing, exchange rates, international management, and regional and national culture.

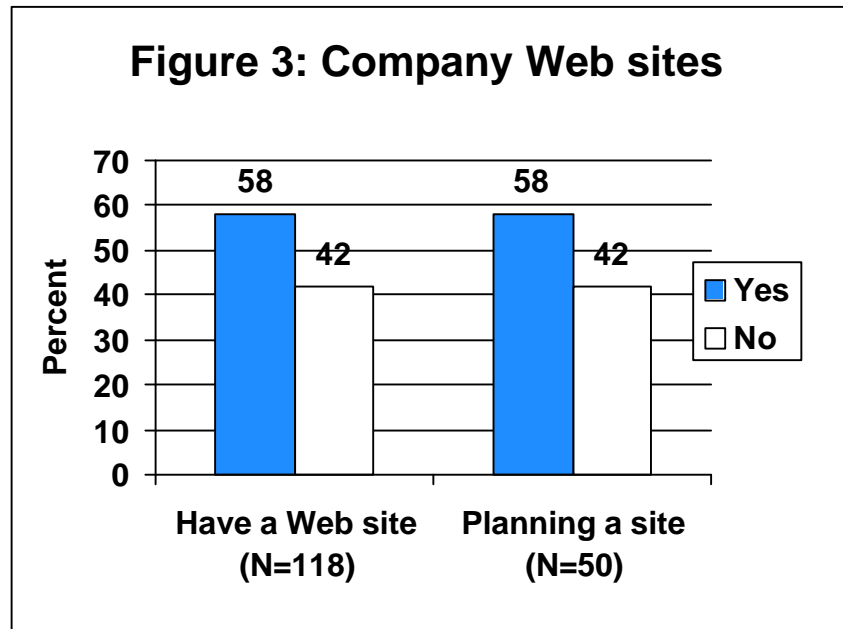
Table 11: Information and training to enhance international business (Percent)

	Not at all interested	Not very interested	Somewhat interested	Very interested	Extremely interested	Total*
Export financing	28	21	28	15	8	100
Exchange rates	28	28	21	16	7	100
Marketing	15	7	26	32	19	99
Identify markets for your products	13	10	14	27	35	99
Sales forecasting	30	14	24	18	15	101
Trade missions	24	23	35	14	4	100
Trade shows	21	16	30	23	10	100
International pricing	24	16	25	22	13	100
International management	32	25	21	10	11	99
Human resource management	35	30	25	5	5	100
U.S. government export controls	19	22	26	27	7	101
Foreign regulations and requirements	10	16	30	30	14	100
Legal framework and regulations	11	23	25	28	13	100
Documentation for exports	15	18	31	23	12	99
Language	28	17	38	9	8	100
Regional and national culture	25	23	28	18	6	100

*Totals may not add to 100% due to rounding.

World Wide Web site

Fifty-eight percent of all companies in the sample have a World Wide Web site (N=118). Among the companies that do not currently have a site (N=50), 58% are planning to launch a site within the next 12 months. If these companies do launch a Web site within a year, a total of 80% of the companies will be online.



Goals of the World Wide Web site

Respondents were asked to indicate the importance of a series of goals for their Web site. The site goals were rated using a five-point scale in which 1 = not at all important and 5 = extremely important. In rank order, by mean response, the goals are:

Table 12: World Wide Web site goals

Goal	Mean	N
Information about products	4.32	63
Information about the company	4.06	64
Advertising	3.73	63
Product sales	3.05	63
Online customer service	2.77	62
Information to suppliers	2.39	62
Online chat for customers	1.79	63

The companies place the most importance on use of the Web site to provide information to customers about products and the company itself. These leading goals are followed by advertising, sales, and customer service. There is less interest in using the site for providing information to suppliers or in building a chat area for customers.

Table 13 provides the percentage response for each of the five scale categories. Combining very and extremely important categories, the major goals of the Web are clearly to provide information about products (92%), information about the company (81%), and advertising (61%).

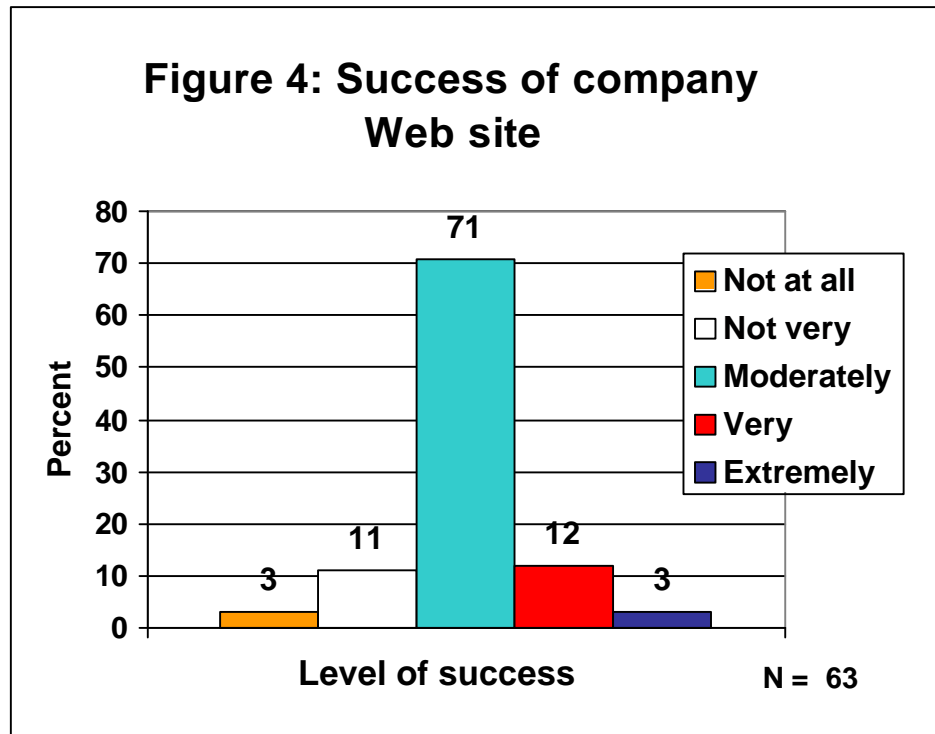
Table 13: Importance of Web site goals (Percent)

	Not at all important	Not very important	Somewhat important	Very important	Extremely important	Total*
Advertising	3	10	27	32	29	101
Product Sales	6	25	38	17	13	99
Online customer service	21	19	31	19	10	100
Information about the company	2	5	13	48	33	101
Information about products	2	2	5	48	44	101
Online chat for customers	44	35	17	3	0	99
Information to suppliers	29	27	26	11	6	99

*Totals may not add to 100% due to rounding.

Success of company World Wide Web site

Companies were asked to indicate the level of success they have had with their Web site. Figure 4 shows that most view the sites as moderately successful (70%). Only 16% rate the site as not very or not at all successful and 14% give a rating of very or extremely successful.



Select verbatim comments on training, information needs, and export assistance

Need for information and export assistance

No need

We're a mature exporter and need minor help if any.

We have been exporting since 1974. It is difficult to imagine what help we might need that we haven't already had.

Not sure we have any specific needs. We are an ISO 9001 company exporting to 60 countries.

We are a small company and do not have many information and training needs.

Identifying customers

The most difficult area we are involved with is identifying potential export customers.

We are always interested in working with qualified companies interested in using our technology and product.

The problem in many countries is obtaining a 'Directory of Manufacturers.' In many countries, where we have no agent, it is difficult to identify the market because a directory is unavailable.

Distribution needs

We need to find reputable agents in local foreign markets to help market and support our products.

Finding distribution partners in foreign countries.

Finding the "right" agent or distributor in some countries (right now China) has proven difficult.

We need low cost shipping worldwide.

Strategy

Implementing a global pricing strategy.

Alliances

Our products are well suited to the European market, but because of our small size we may have difficulty in establishing a direct export program. Information on establishing/growing a strategic alliance with someone in that market would be very helpful.

We are able to get our product to end users in other countries through quality strategic alliances. We have cultivated these alliances with forwarding companies and suppliers who know and/or need our specialty products.

Regions

Our interest is primarily focused upon developing opportunities in South America where we have no experience.

Training interests

General Interest

We would support a comprehensive program on exporting - anything from logistics/sales/marketing/pricing/culture, etc.

Economic/cultural/industrial differences between markets

Communication

Our biggest problem in dealing with foreign customers is the communication barrier. Although most of our overseas clients speak English fairly well, we still seem to have problems communicating. This seems to be due to different standards and expectations. I guess what it boils down to is a cultural difference.

Distribution

I would like to know more about brokerage firms and their role in moving goods to and from one country to another.

We need to be trained on how to locate good sales reps for our products and/or other marketing technologies.

Issues in training

Need practical training, not more theory.

Appendix A Methodology

In early June 1998, a mailing was sent to 474 companies. The mailing consisted of a four-page questionnaire (Appendix C), a cover letter, and business reply envelope. The mailing was sent first class and there was no cost to the respondent for returning the survey in the self-addressed, postage-paid envelope.

The names and addresses used in the mailing were obtained through a commercial list service that identifies companies engaged in exporting. Based on previous surveys mailed to companies using commercial lists and on the research literature in industrial marketing research, the expected response rate was between 35-40%.

A total of 13 envelopes were returned as undeliverable. After three weeks, only 78 companies had responded to the mailing for a response rate of 16.9%. To improve the response rate, a second mailing was sent to all nonrespondents in early July. The second mailing resulted in an additional 41 responses for a total response rate of 25.8%.

In order to evaluate the response rate, a systematic random sample of 15% was drawn from the nonrespondents (N=342) and phone calls were made to the 50 selected companies. The phone calls determined that five companies do not export at all and have no plans to do so and three companies were no longer in business. In effect, about 6% of the non-responding companies are not in existence and therefore should not be included in a response rate computation. Based on the random-sample phone survey, the number of usable companies in the nonrespondent data set of 342 was reduced by 6% to 321.

In summary, the total usable database, excluding nondeliverables and nonexisting companies is estimated at $N = 321 \text{ nonrespondents} + 119 \text{ respondents} = 440$. The response rate is computed as $119/440 = 27\%$. This response rate is somewhat lower than expected. A comparison of the sample with the mailing list showed no significant difference in terms of the county of location. Specifically, a Chi-square goodness of fit test compared the number of cases in the sample from each county with the total in the mailing list from each country and showed that the sample is not statistically different from the population ($X^2 = 5.15, df = 7$). This indicates that the sample is a reasonable representation of the companies on the mailing list.

Appendix B

Sample Characteristics

The following tables provide aggregate information about all 119 companies in the sample.

Table A1: Location of company

	N	Percent
Erie	84	71
Niagara	9	8
Cattaraugus	7	6
Chautauqua	7	6
Wyoming	1	1
Allegany	1	1
Orleans	5	4
Genesee	5	4
Total	119	100

Table A2: Type of location

	N	Percent
Headquarters	39	33
Subsidiary	23	19
Single location	57	48
Total	119	100

Table A3: Total employees

	N	Percent
1 to 9	19	16
10 to 24	14	12
25 to 49	26	22
50 to 99	15	13
100 to 499	34	29
Over 500	11	9
Total	119	101

Table A4: Type of industry (SIC)*

	N	Percent
20 Food and Kindred Products	2	2
22 Textile Mill Products	1	1
24 Lumber and Wood Products	5	4
25 Furniture and Fixtures	3	3
27 Printing and Publishing	5	4
28 Chemicals and Allied Products	5	4
29 Petroleum and Coal Products	1	1
30 Rubber and Misc. Plastics Products	5	4
31 Leather and Leather Products	1	1
32 Stone, Clay, and Glass Products	3	3
33 Primary Metal Industries	4	3
34 Fabricated Metal Products	16	13
35 Industrial Machinery and Equipment	24	20
36 Electronic and Other Electric Equipment	6	5
37 Transportation Equipment	4	3
38 Instruments and Related Products	12	10
39 Miscellaneous Manufacturing Industries	1	1
50 Wholesale Trade--Durable Goods	13	11
51 Wholesale Trade--Nondurable Goods	2	2
52 Building Materials and Garden Supplies	1	1
70 Hotels And Other Lodging Places	3	3
80 Health Services	1	1
87 Engineering and Management Services	1	1
Total	119	101

*SIC = Standard Industrial Classification

Table A5: Annual sales

	N	Percent
Under \$1,000,000	17	14
\$1,000,000 to \$4,999,000	38	32
\$5,000,000 to \$9,999,999	16	13
Over \$10,000,000	48	40
Total	119	99

Appendix C Questionnaire

Buffalo State College -- Business Department International Business and Exporting Survey

The Business Department at Buffalo State College has received a Business and International Education Program grant that provides funds to assist area businesses in development of exporting and international activities. This brief survey will help us to provide services of value to you. Please take a few minutes to answer these questions and return the questionnaire to us in the enclosed business reply envelope. We thank you for your cooperation.

1. **Which of the following describes your company's current level of international involvement? (Please circle each activity you are involved with.)**
 1. Do not export
 2. Indirect exporting (using a U.S.-based export management or export trading company)
 3. Direct exporting
 4. Use of overseas distributor or agent
 5. License overseas production
 6. Joint venture in overseas production facility
 7. Direct ownership of overseas production facility

2. **During the next 12 months, what are your plans for exporting? (Circle one)**
 1. Do not plan to export [Please Skip to Question 8]
 2. Decrease exports
 3. Stay about the same
 4. Increase exports

3. **How important are international export sales as a part of your total sales activity? (Circle one)**
 1. Not at all important
 2. Not very important
 3. Somewhat important
 4. Very important
 5. Extremely important

4. **Please identify the countries and/or regions to which you now export . (Circle all that apply.)**

1. Canada	5. Japan	9. Southeast Asia
2. China	6. Latin America	10. South Asia
3. Europe	7. Mexico	11. Other _____
4. Germany	8. United Kingdom	12. Other _____

5. **Which two of these countries and/or regions are the most important to your company?**

6. **How much competition from imports do your major products now experience *within the U.S.*?**
 1. No competition from imports
 2. Little competition from imports
 3. Moderate competition from imports
 4. Substantial competition from imports

7. Please evaluate the importance of the following factors for your competitive advantage in international markets? (Please circle your responses.)

	Not at all important	Not very important	Somewhat important	Very important	Extremely important
1. Marketing	1	2	3	4	5
2. Product quality	1	2	3	4	5
3. Distribution	1	2	3	4	5
4. Labor cost	1	2	3	4	5
5. Product features	1	2	3	4	5
6. Technology	1	2	3	4	5
7. Customer service	1	2	3	4	5
8. Pricing	1	2	3	4	5
9. Delivery	1	2	3	4	5
10. Financing	1	2	3	4	5
11. Other _____	1	2	3	4	5

8. Does your firm have a World Wide Web site that permits you to provide information to customers and/or suppliers through the Internet?

1. Yes [Please Skip to Question 10]
2. No

9. Are you planning to develop a World Wide Web site in the next 12 months?

1. Yes
2. No [Please Skip to Question 14]

10. What is the URL for your company's web site: _____

11. How important is each of the following goals for your web site? Rate each from 1 to 5 where 1 = Not at all important and 5 = Extremely important.

	Not at all important	Not very important	Somewhat important	Very important	Extremely important
1. Advertising	1	2	3	4	5
2. Product sales	1	2	3	4	5
3. Online customer service	1	2	3	4	5
4. Information about the company	1	2	3	4	5
5. Information about products	1	2	3	4	5
6. Online chat for customers	1	2	3	4	5
7. Information to suppliers	1	2	3	4	5

12. In your opinion, how successful is your Web site at meeting the goals you have set?

1. Not at all successful
2. Not very successful
3. Moderately successful
4. Very successful
5. Extremely successful

13. Would you be interested in an evaluation of your Web site?

1. Yes
2. No

14. In your opinion, how has NAFTA helped with your company's export activities?

1. Decreased exports
2. Made no difference
3. Increased exports

15. Are you involved in any strategic alliances or non-equity cooperative ventures with foreign companies?

1. Yes
2. No [Please Skip to Question 17]

16. What are the primary goal(s) of your alliance(s)? (Circle all that apply.)

1. Sharing research and development knowledge
2. Development of a distribution system
3. Avoid the risk of investment overseas
4. Other (Please specify): _____

17. How should the U.S. government deal with the threat of imports to firms in your industry?

1. Place no limits on imports to force U.S companies to be competitive
2. Place some limits on imports to ensure that there is fair competition
3. Place strict limits on imports to protect U.S. companies

18. We would like to know more about the needs of your company.

Please indicate your interest in obtaining information and/or training about each of the following aspects of international business and exporting. (Please circle your responses.)

	Not at all interested	Not very interested	Somewhat interested	Very interested	Extremely interested
1. Export financing	1	2	3	4	5
2. Exchange rates	1	2	3	4	5
3. International pricing	1	2	3	4	5
4. Marketing	1	2	3	4	5
5. Human resource management	1	2	3	4	5
6. Trade missions	1	2	3	4	5
7. Trade shows	1	2	3	4	5
8. International management	1	2	3	4	5
9. Language	1	2	3	4	5
10. Regional/national culture	1	2	3	4	5
11. Documentation for exports	1	2	3	4	5
12. Sales forecasting	1	2	3	4	5
13. Identify markets for your products	1	2	3	4	5
14. U.S. government export controls	1	2	3	4	5
15. Foreign regulations and requirements	1	2	3	4	5
16. Legal framework and regulations	1	2	3	4	5
17. Other _____	1	2	3	4	5

