



PACIFIC ISLANDS EXPORT SURVEY 2024

Insights into export dynamics in the Pacific

Introduction

INSIGHTS INTO PACIFIC EXPORTERS

Pacific Trade Invest (PTI) is proud to publish the *Pacific Islands Export Survey 2024*. This report marks a decade of gathering first-hand data from Pacific exporters, and compiling valuable snapshots into export business dynamics across the region. This series is a vital insight into the opinions and actions of those who generate goods and services to sell to people from other countries across the Blue Pacific. We are thankful to all those who took part in the survey from farmers, tourism operators, wholesalers, retailers, service providers and more.

This year saw us expand the survey questions to include specific data on gender equality, disability and social inclusion, generating both fascinating and promising results. With ten years of data behind us, we are proud to have produced an in-depth longitudinal report in partnership with Griffith University, to further explore long term trends, patterns and changes in Pacific exporting.

It is heartening that this report highlights rising business confidence, revenue, expectations of new markets and more. It is a great honour to share with you the *Pacific Islands Exports Survey 2024*. This is the sixth biennial survey conducted by Fifth Quadrant with the support of the Australian Government and Pacific Islands Forum Secretariat.



Caleb Jarvis

General Manager
Pacific Trade Invest

Background

SPECIFIC OBJECTIVES

The Pacific Islands Export Survey series is a biennial research survey conducted by PTI Australia with the key objective of understanding and tracking export dynamics in the Pacific Islands. The specific objectives of this study are to:

- Determine business confidence;
- Identify Initiatives to increase exports;
- Understand the use of digital marketing in generating export revenue;
- Identify key export target markets;
- Understand barriers to exporting in the Pacific;
- Understand financial and investment needs;
- Understand the impact of extreme weather;
- And gather gender equality, disability and social inclusion insights for exporter.

Related reports

Marking a decade of collecting data, and the first year of dedicated GEDSI reporting, the Pacific Islands Export Survey 2024 is complemented by:

**Pacific Islands
Export Survey 2024**
[GEDSI Report](#)

**Pacific Islands
Export Survey 2014-2024**
[Longitudinal Report](#)

ACADEMIC FOREWORD

The *Pacific Export Survey 2024* provides key insights into the economic ecosystem of our region. This data supports the work to meet Sustainable Development Goals eight (decent work and economic growth) and nine (industry, innovation, and infrastructure). It also underpins the implementation of the 2050 Strategy for the Blue Pacific Continent, especially Pillar Four: ‘Resource and Economic Development’.

This data tells a story of ongoing recovery from the impacts of COVID-19, with mixed results. Overall, export revenue has increased markedly, by 49 per cent, bringing it back to pre-pandemic levels. Exports to Europe and North America have increased since 2022 and have returned to pre-COVID levels. However, whilst exports to China have increased since 2022 (from 9 per cent to 12 per cent), they are still well down on the 2020 figures for that market (18 per cent). This recovery feeds high levels of confidence, with 78 per cent of respondents expecting an increase in export revenue over the coming year. This has flow-on effects: the data shows an increase in expectation of hiring new staff in the next year. In addition, 71 per cent of businesses plan to expand into new export markets within the next three years.

When it comes to supporting Pacific exporters, there is more work to do. Some challenges are persistent, presenting barriers to exporting. Access to finance remains in the top five barriers, despite an improving trend since 2018. Challenges associated with labour issues has increased slightly from 26 per cent to 29 per cent. Given what we are learning elsewhere about the impacts

of labour mobility programmes in sending countries, this will likely be more significant in the future.

Across the world business practices are changing. Pacific Trade and Invest (PTI) has supported an increased uptake of online and digital tools among Pacific exporters. Digital activity is increasing, especially in the tourism and services sectors. The most predominant aspect of this is the use of social media with the use of third-party websites/apps remaining very low in the mix. Overall, the full maximisation of digital capacity is still a work in progress. The appetite for training among Pacific exporters remains strong, including in relation to increasing revenue using online channels.

It is not surprising to learn that the climate crisis has significant impacts. This data reveals that 72 per cent of respondents were affected by severe weather patterns in the preceding 12 months, with the impact of extreme storms showing an increase of 10 per cent over the 2022 figures, from 27 to 37 per cent. The agriculture and tourism sectors are particularly vulnerable to these impacts. New to this year’s survey is data relating to gender equity, disability and social inclusion (GEDSI). Awareness of the importance of gender equity is well-established among Pacific exporters. Businesses led by women, or which employ a person living with a disability demonstrate a greater awareness of GEDSI principles. This report is an important tool not only for PTI but for all those who work in the business ecosystems of the Pacific Islands region.

DR TESS NEWTON CAIN
Pacific Analyst

Contents

KEY INSIGHTS	4
SAMPLE PROFILE	6
EXPORT CONFIDENCE	14
INITIATIVES TO INCREASE EXPORT	20
DIGITAL MARKETING	23
EXPORT DESTINATIONS	34
BARRIERS TO EXPORTING	40
FINANCE & INVESTMENT	48
IMPACT OF EXTREME WEATHER PATTERNS	54
GENDER, DISABILITY, SOCIAL INCLUSION	61

KEY INSIGHTS

Business Confidence Among Pacific Exporters has Increased

It appears that exporters have recovered from the decline in growth seen in 2022, with respondents reporting a rise in revenue over the last 12 months that match pre-pandemic levels.

Further, businesses are optimistic about the 12 months ahead, with the highest number of respondents expecting growth since tracking began.

It is also assuring that 60% of Pacific exporters expect to hire new employees over the next 12 months, a significant increase from 54% in 2022 and 43% in 2020.

Pacific Exporters are Prioritising Initiatives to Increase Export Orders

Copy: Exporters continue to be implementing ways to improve exporting orders, with a significant increase in businesses hiring new staff and training staff to encourage innovation and entering new markets.

Further, over a third of respondents contacted Pacific Trade Invest for assistance, which is the highest proportion since tracking began.

Digital Marketing is Playing a Key Role in Driving Growth

Digital marketing is playing a key role in driving growth, with 2-in-5 businesses seeing an increase in online export orders in the last year.

This report also finds there has been an increase in the proportion of revenue generated by online channels in mature exporters, as well as in the agricultural and manufacturing industries.

Growth Expected from North American and Australia

Seven out of ten exporters are targeting new markets in the next three years. While fewer businesses are targeting North America and Australia for the first time next year, those are the two markets that most businesses expect increased orders to come from.

Notably, this report shows that more and more businesses are including other Pacific Islands in their target markets, with a gradual shift over ten years of tracking skewing towards respondents exporting to both the Pacific and other countries.

KEY INSIGHTS CONTINUED

Costs and Logistics Remain Key Barriers

Cost and logistical challenges remain primary barriers for exporters in the Pacific Islands, though the proportion of respondents citing these has decreased since 2022.

The agriculture and manufacturing sectors face significant cost and logistical hurdles, while tourism struggles with marketing capability and labor issues, both of which have increased as barriers since 2022.

Finance Remains Hard to Obtain with Banks Viewed as Inflexible

Two-thirds of exporters still struggle to obtain finance, with not being able to borrow and inflexibility from banks identified as the biggest hurdles, with the latter increasing in prevalence since 2022.

New exporters face greater difficulty than mature exporters, and agricultural businesses experience more challenges when compared to other industries.

Extreme Weather Still

The proportion of businesses affected by extreme weather remains consistent with previous waves.

Reports of frequency of extreme storms has increased significantly, while flooding has decreased.

Over 4-in-5 businesses experienced disrupted operations due to extreme weather events, primarily resulting in decreased productivity. This appears to disproportionately impact the tourism industry, resulting in short-term business closure, reduced customers, and higher insurance costs.

GEDSI Concepts Familiar to Pacific Exporters

There is a strong familiarity of GEDSI concepts among Pacific businesses, with gender equality is the most familiar concept of the three.

Further, approximately 4-in-5 businesses have either mostly or fully implemented gender equality and social inclusion policies and practices. This drops significantly with disability inclusion, with only half having implemented policies and practises, while more than a quarter of businesses employ someone living with a disability.

Larger businesses, female-led businesses and businesses employing individuals with a disability, are more likely to have GEDSI policies and practices in place.



Tiny island, Vanuatu

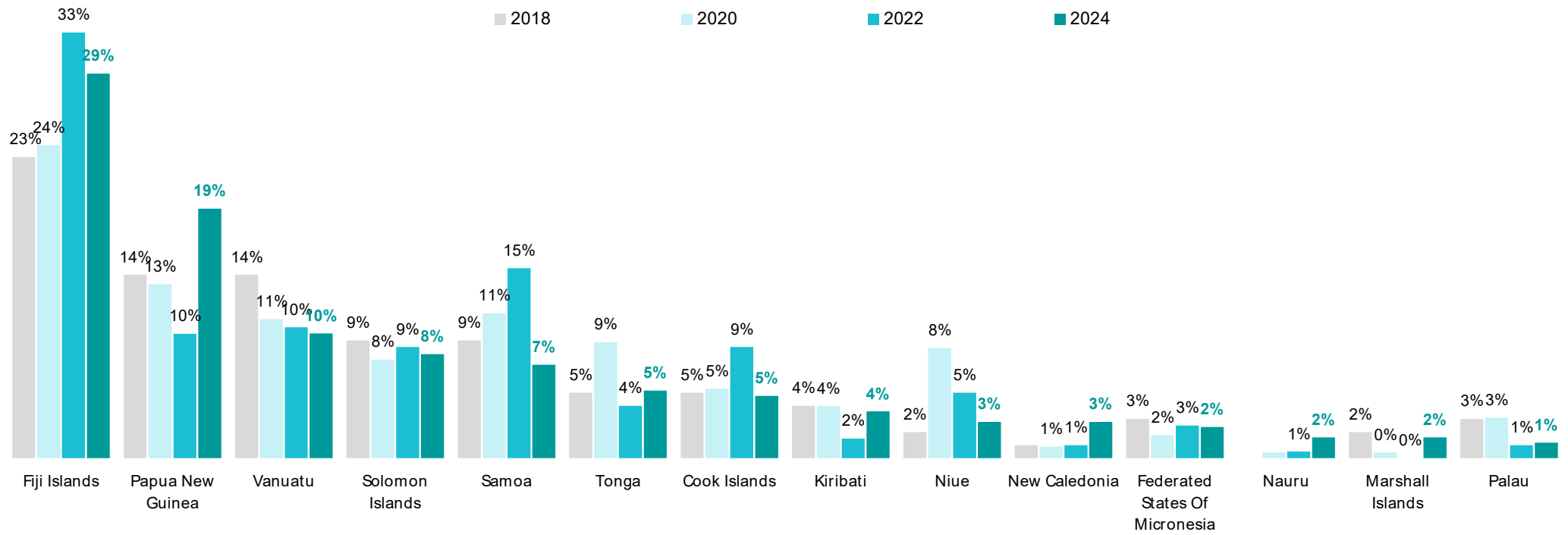
SAMPLE PROFILE

Location

Our 2024 sample includes exporter businesses across the Pacific Islands, with the distribution similar to previous

surveys, with the exception of Papua New Guinea, where the response rate increased significantly in 2024.

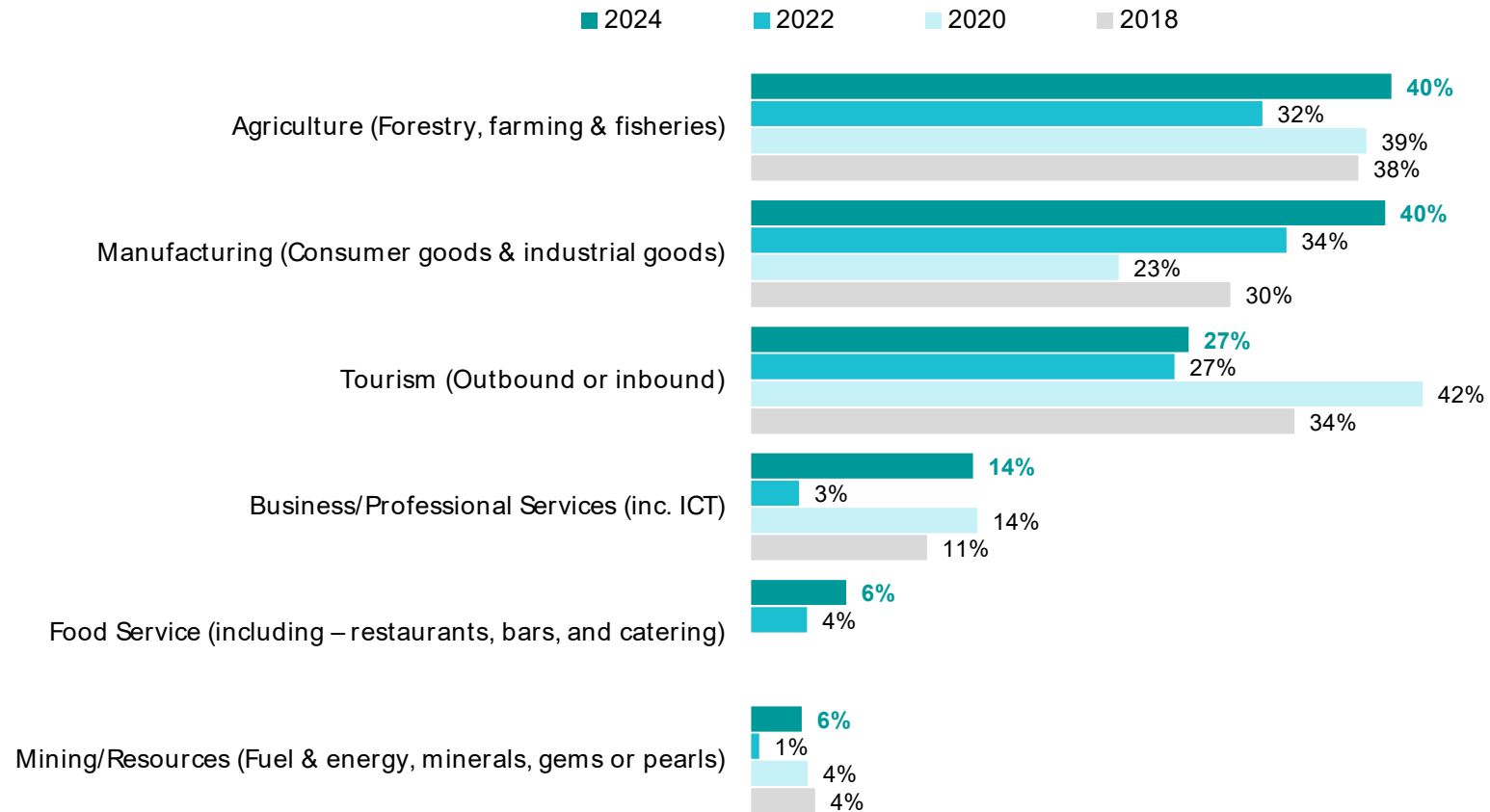
IN WHICH PACIFIC ISLAND COUNTRY IS YOUR MAIN BASE OF OPERATIONS?



Main Export Activity

As with previous surveys, the 2024 survey was completed by a range of respondents across various export activities.

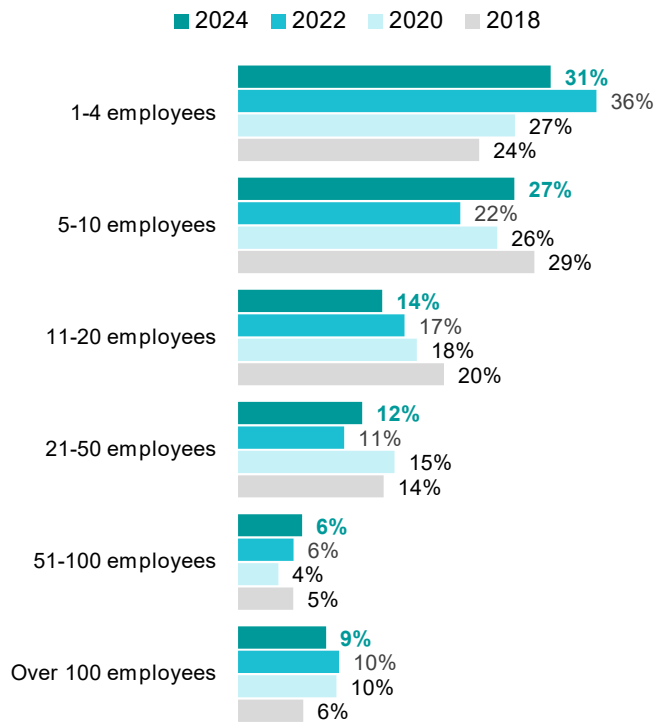
WHAT IS THE MAIN EXPORT ACTIVITY OF YOUR ORGANISATION?



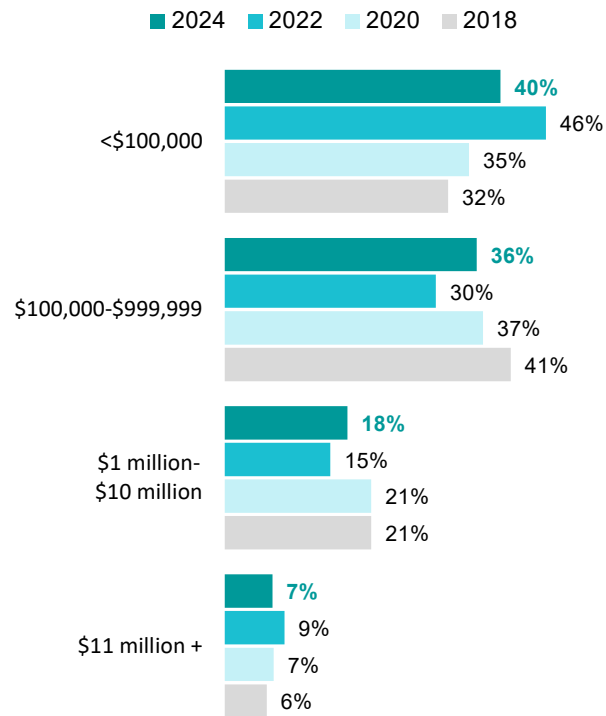
Business Profile

The 2024 survey was completed by broad array of companies, in terms of employee size, annual revenue, and ownership structure.

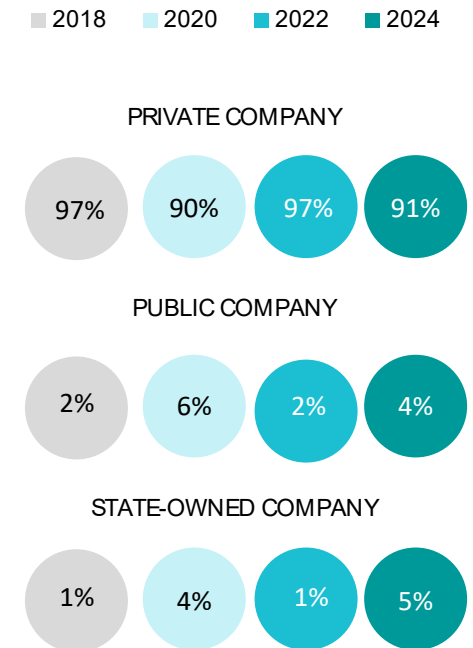
NO. EMPLOYEES



ANNUAL REVENUE



OWNERSHIP STRUCTURE

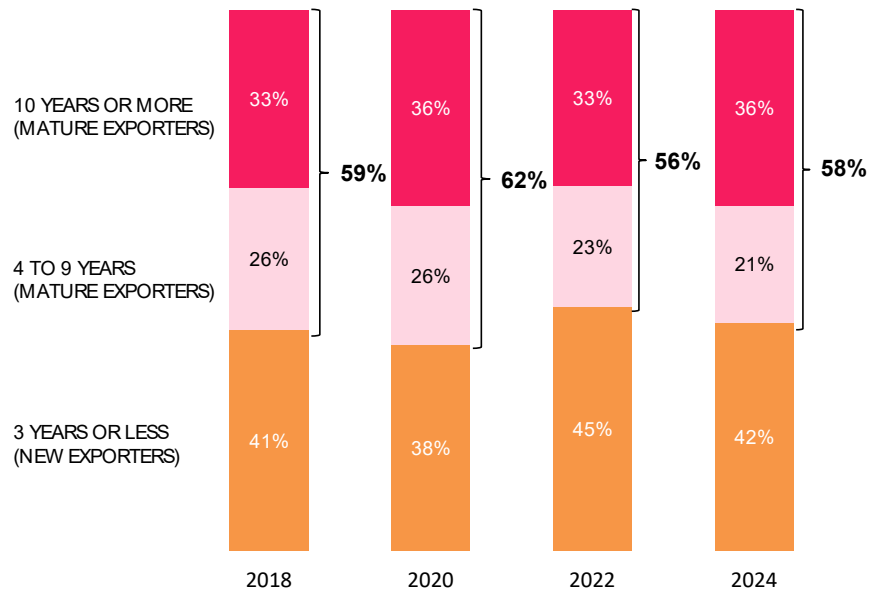


Number of Years in Operation

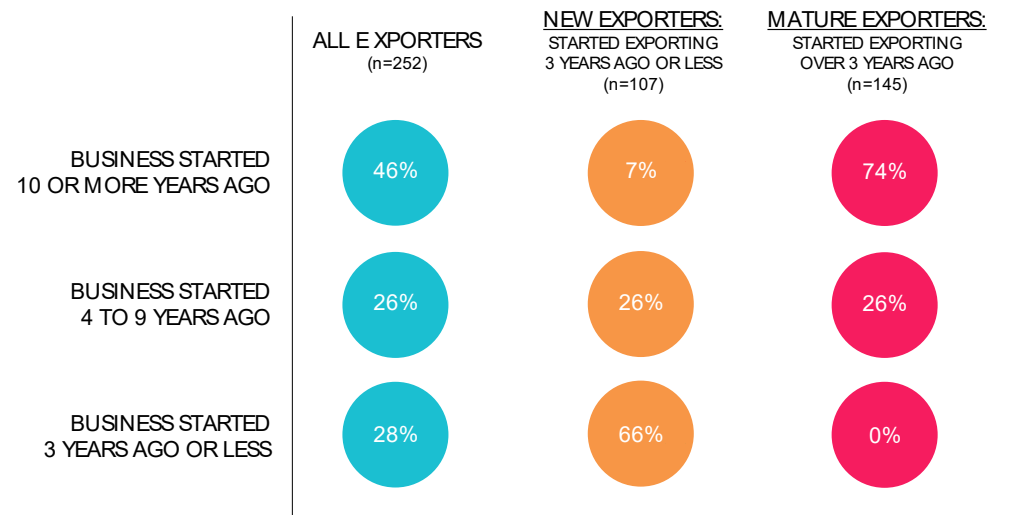
While the proportion of new exporters has declined slightly in 2024, two-thirds of new exporters are also

new businesses, having only begun operations within the last three years.

HOW LONG HAVE YOU BEEN EXPORTING?



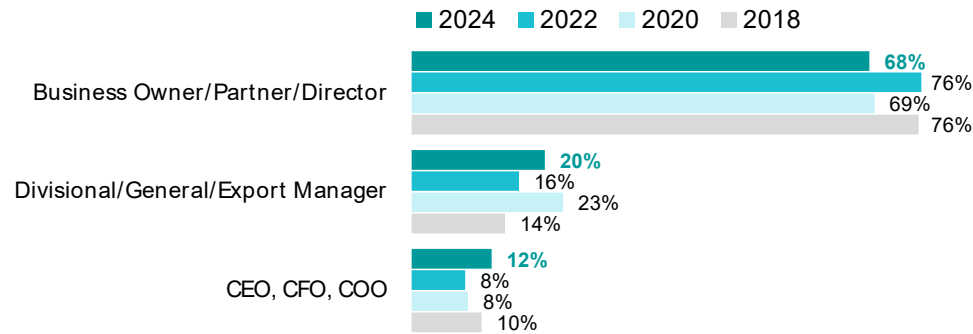
WHEN DID YOUR BUSINESS START OPERATIONS?



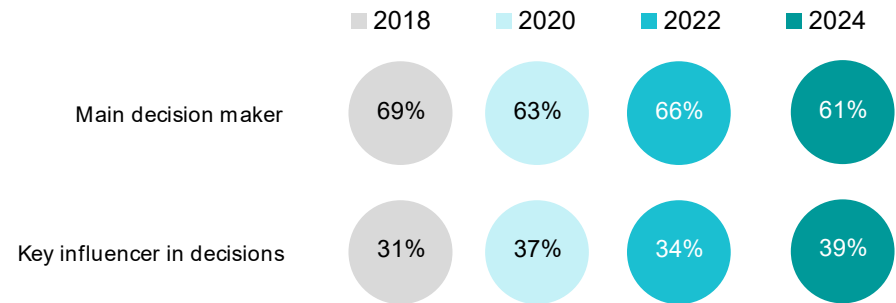
Respondent and Employee Profile

Gender representation at employee levels is similar to 2022, however the longer-term trend shows the proportion of female proprietors and executives steadily rising.

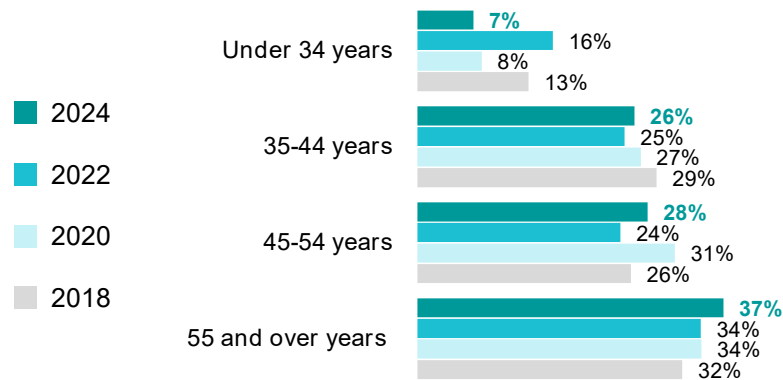
WHAT IS YOUR JOB TITLE?



LEVEL OF DECISION-MAKING



AGE OF PROPRIETOR/CEO/MD



GENDER OF EMPLOYEES











	FEMALE	MALE
CEO/Proprietor/MD	40% (2022: 39%) (2020: 39%) (2018: 32%)	60% (2022: 61%) (2020: 61%) (2018: 68%)
Executives	44% (2022: 43%) (2020: 43%) (2018: 41%)	56% (2022: 57%) (2020: 57%) (2018: 59%)
Employees	50% (2022: 51%) (2020: 50%) (2018: 49%)	50% (2022: 49%) (2020: 50%) (2018: 51%)

New and Mature Exporters Snapshot

As expected, new exporters have lower revenue and fewer employees than mature exporters. They are also

more likely to be female-led than mature exporters and have a younger leadership.

HOW LONG HAVE YOU BEEN EXPORTING?

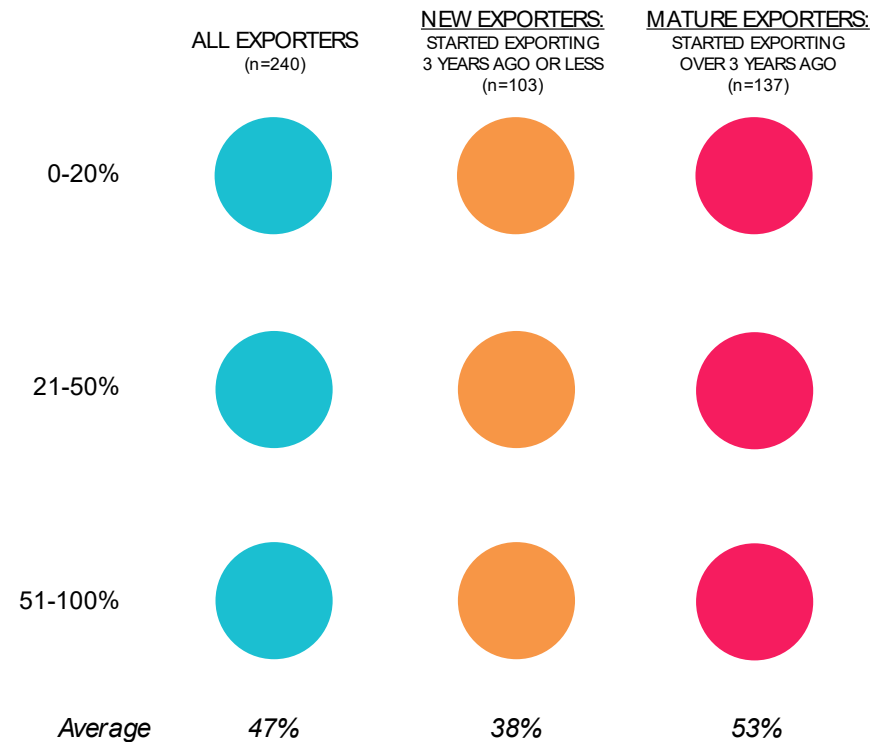
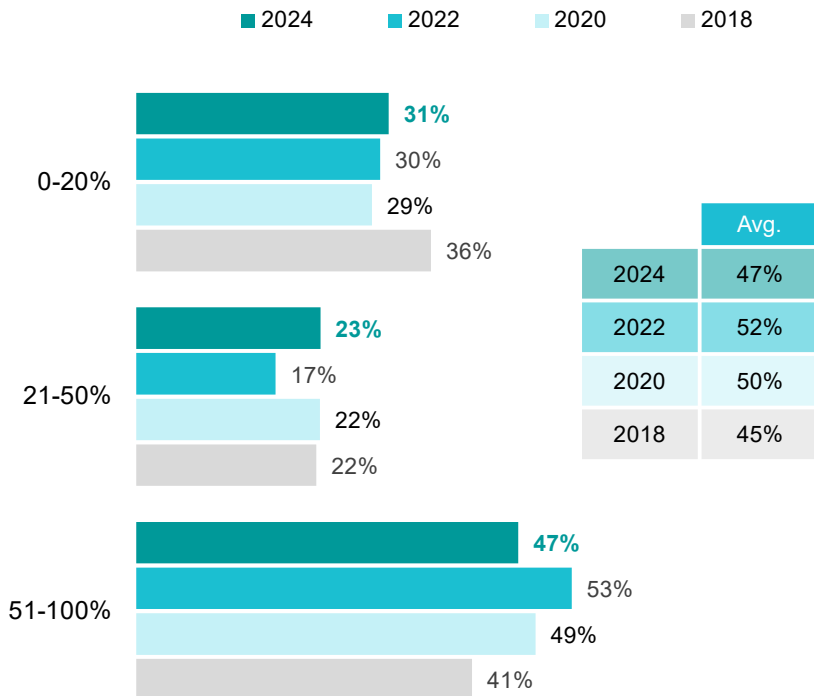
	NEW EXPORTERS: STARTED EXPORTING 3 YEARS AGO OR LESS (n=107)	MATURE EXPORTERS: STARTED EXPORTING OVER 3 YEARS AGO (n=145)
Mean Number of employees	9	32
Mean Annual Revenue	\$243,122	\$2,747,199
Main Export Activity	 38% Manufacturing  37% Agriculture  20% Tourism	 42% Agriculture  41% Manufacturing  33% Tourism
Gender of Proprietor/CEO/MD	 53% Male  44% Female Another term: 3%	 65% Male  35% Female
Mean Age of Proprietor/CEO/MD	45	50

Revenue Generated from Exporting

Export orders remain a key revenue source respondents. Selling to overseas customers constitutes for

almost half of revenue on average, with that being higher among mature exporters.

WHAT % OF YOUR REVENUE IS FROM EXPORT ORDERS OR SELLING YOUR PRODUCTS AND/OR SERVICES TO OVERSEAS CUSTOMERS?





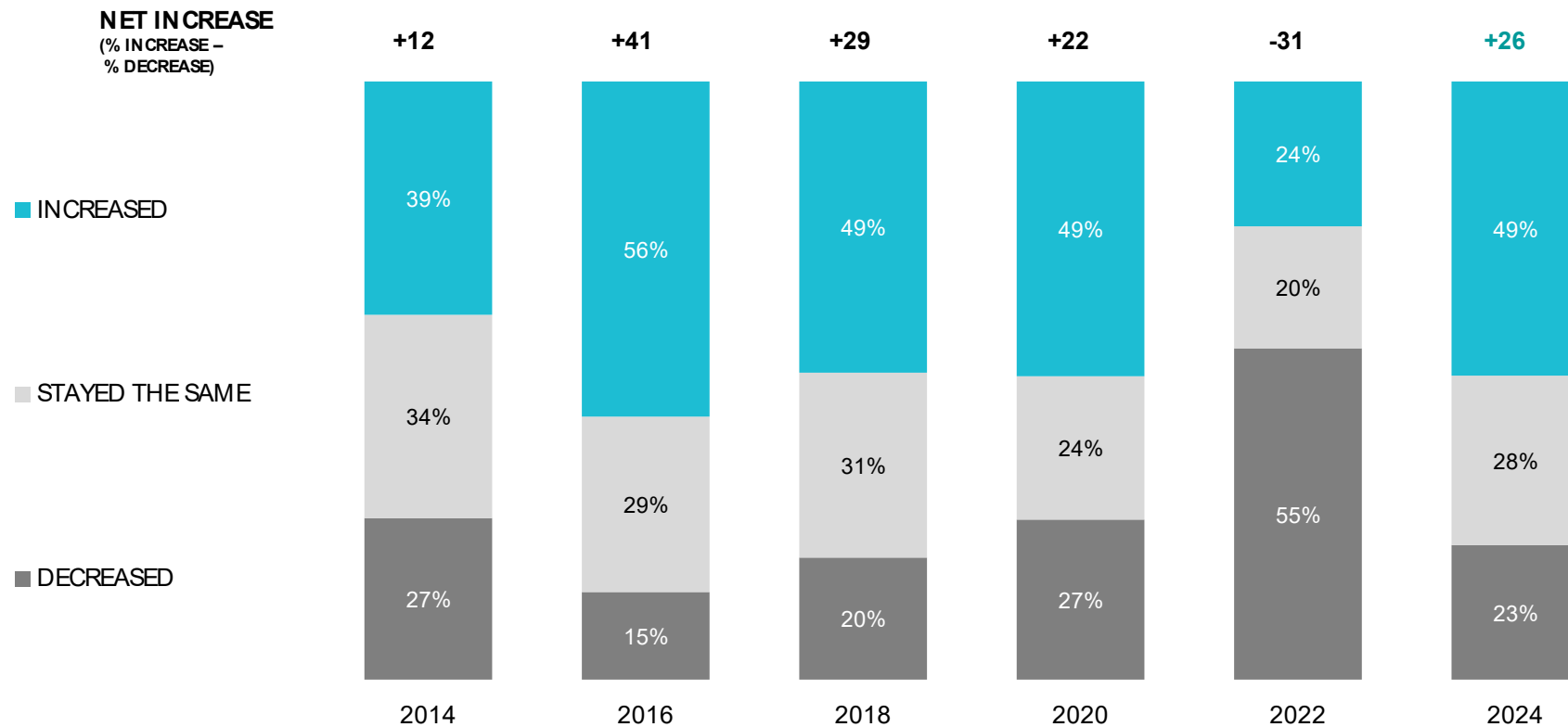
EXPORT CONFIDENCE

Change in Export Orders over the last 12 months

Pacific exporters have recovered from the decline in growth seen in 2022, with respondents reporting increased

export revenue and orders in the last 12 months that are on par with pre-pandemic levels.

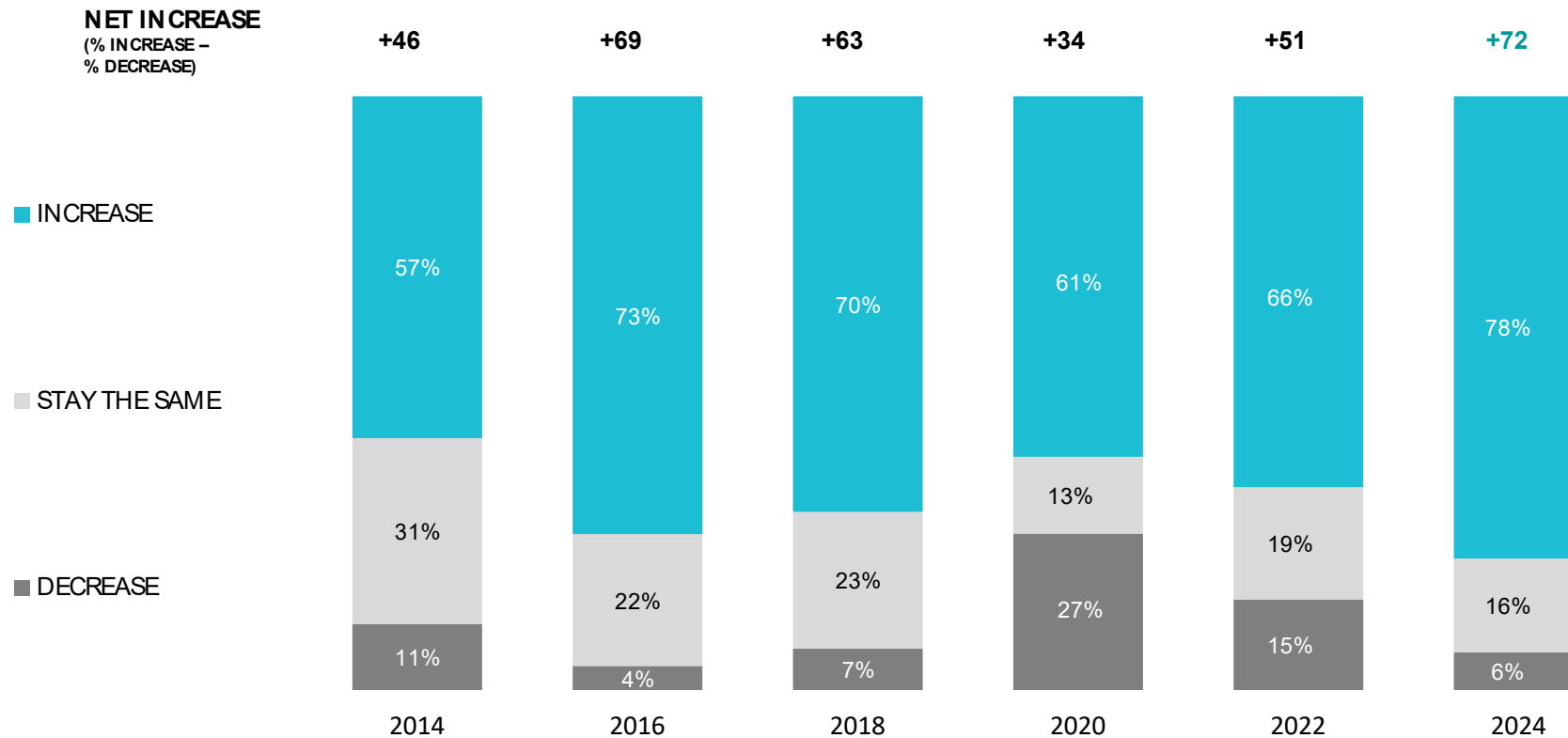
OVER THE LAST 12 MONTHS, HAS YOUR EXPORT REVENUE INCREASED, DECREASED, OR STAYED THE SAME?



Expected Change in Export Orders in the next 12 months

Businesses are extremely optimistic about the next 12 months, with 4 out of 5 businesses expecting an increase in export orders, the highest since tracking began.

OVER THE LAST 12 MONTHS, HAS YOUR EXPORT REVENUE INCREASED, DECREASED, OR STAYED THE SAME?



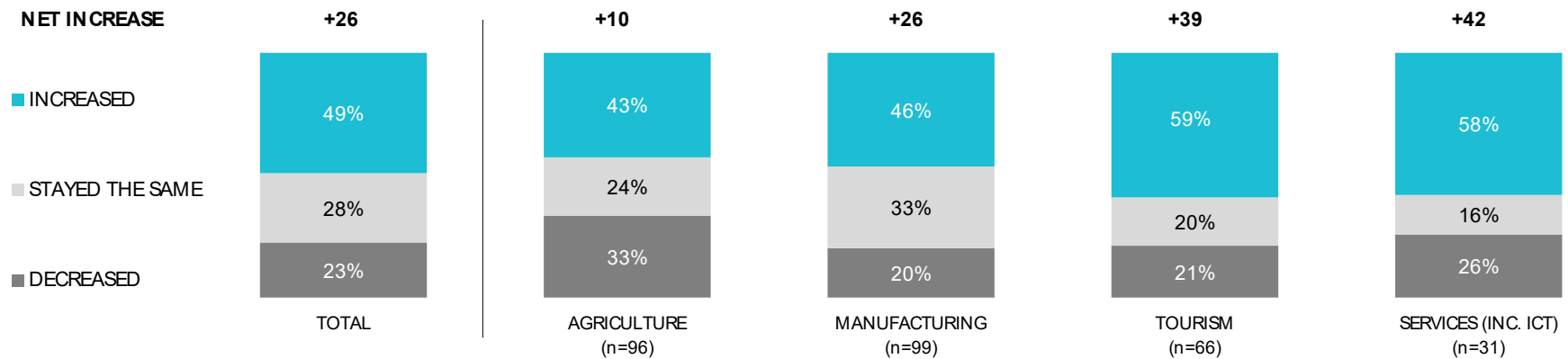
Change in Export Orders

BY INDUSTRY

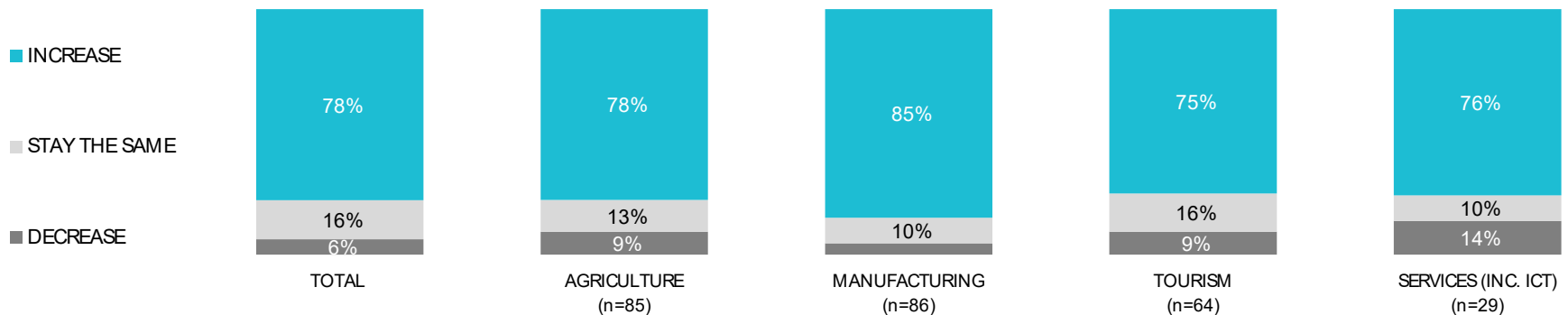
Businesses experienced an increase in export orders across all industries over the last 12 months. Despite a lower revenue increase over the last 12 months than other sectors, agriculture

businesses are confident about export revenue in the next 12 months, following only manufacturers.

LAST 12 MONTHS



NEXT 12 MONTHS



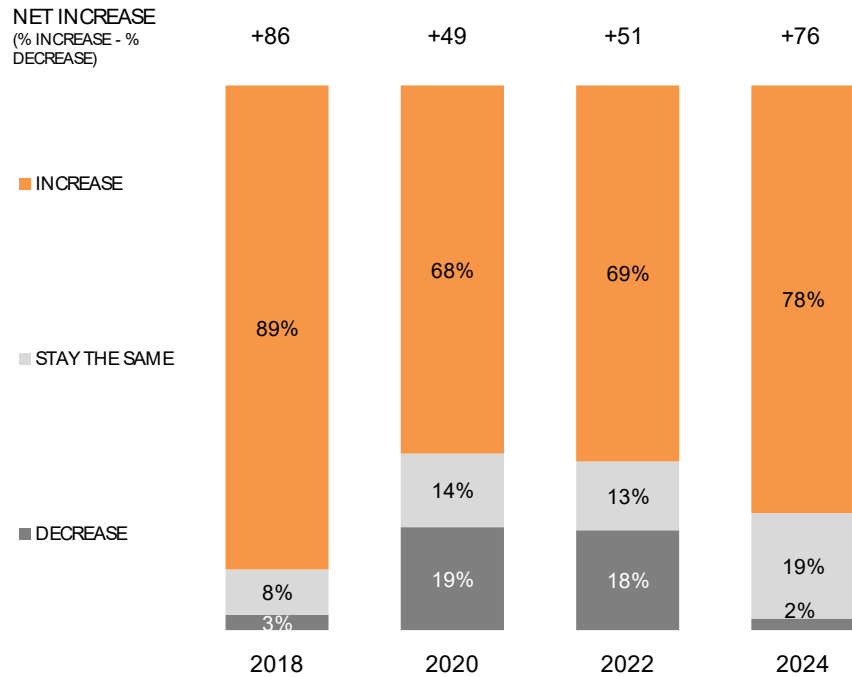
Change in Export Orders

BY MATURITY

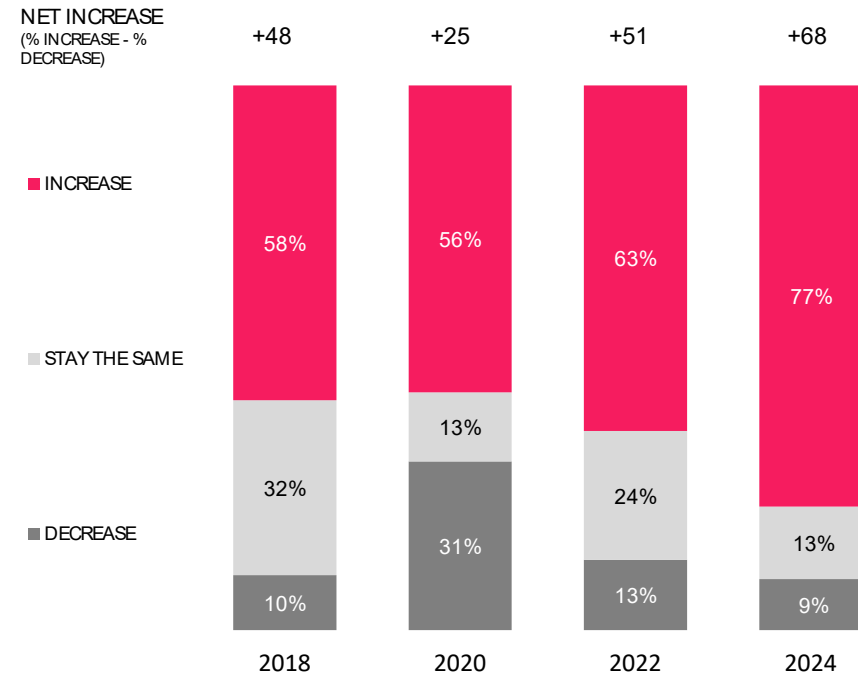
Both new and mature exporters are optimistic about export revenue in the year ahead, with mature exporters confidence at the highest levels since tracking began.

OVER THE NEXT 12 MONTHS, DO YOU EXPECT EXPORT REVENUE TO INCREASE, DECREASE, OR STAY THE SAME?

NEW EXPORTERS: STARTED EXPORTING 3 YEARS AGO OR LESS



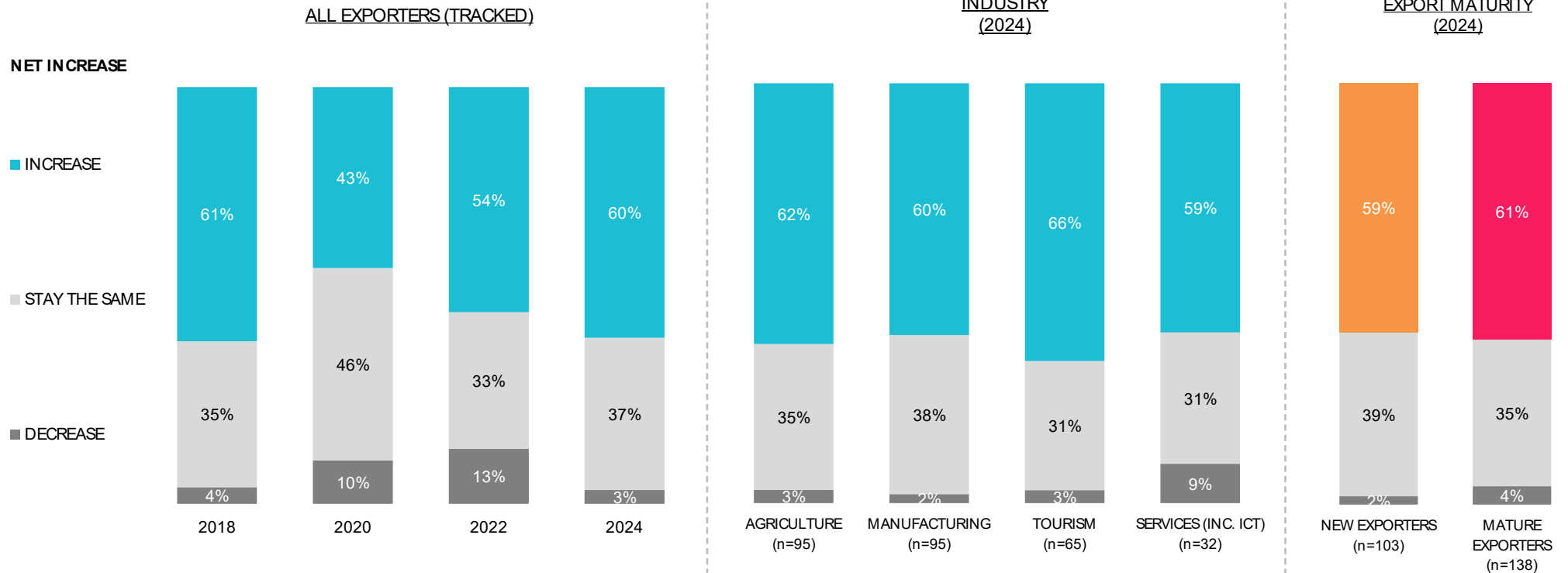
MATURE EXPORTERS: STARTED EXPORTING OVER 3 YEARS AGO



12-month Employment Projections

In line with rising confidence, there is an increase in exporters who expect to hire new employees over the next 12 months. This is highest among tourism businesses.

OVER THE NEXT 12 MONTHS, DO YOU EXPECT EXPORT REVENUE TO INCREASE, DECREASE, OR STAY THE SAME?





INITIATIVES TO INCREASE EXPORT

Initiatives Instigated to Increase Export Orders over the last 12-months

Exporters continue to prioritise improving business processes and developing new products as initiatives to increase export orders. This year also saw an increase in exporters hiring new staff and training staff to

encourage innovation and enterig new markets. A third of repsondants contacted Pacific Trade Invest for assistance, both the highest since tracking began.

WHAT INITIATIVES HAS YOUR ORGANISATION INSTIGATED TO INCREASE EXPORT ORDERS IN THE LAST 12 MONTHS?

		2022	2020	2018
<i>Average no. initiatives</i>	3.8	3.5	3.7	3.7
Improved business processes to improve efficiency	50%	50%	46%	43%
Developed new products/services specifically for export markets	44%	47%	45%	43%
Enhanced marketing through online channels	42%	40%	42%	43%
Hired new staff/trained staff to encourage innovation across the organisation	40%	23%	28%	33%
Entered new markets	37%	27%	35%	39%
Contacted Pacific Trade Invest for assistance	34%	28%	26%	28%
Implemented new technology platforms	30%	30%	26%	22%
Allocated more time and money to drive innovation	30%	28%	36%	34%
Improved ecommerce capabilities	27%	26%	29%	26%
Repositioned the business to align with export markets	25%	28%	27%	30%
Improved speed of delivery	24%	22%	25%	20%

Initiatives Instigated to Increase Export Orders

BY INDUSTRY AND MATURITY

Mature exporters implemented more initiatives to increase export orders. Tourism businesses focussed on enhancing marketing through online channels and hiring new staff and

training staff, while service business focussed on implementing new technology platforms. In comparison to other industries, agricultural companies utilised Pacific Trade Invest's assistance the most.

WHAT INITIATIVES HAS YOUR ORGANISATION INSTIGATED TO INCREASE EXPORT ORDERS IN THE LAST 12 MONTHS?

INITIATIVE	OVERALL	EXPORT AREA				EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
<i>Base n=</i>	<i>n=252</i>	<i>n=101</i>	<i>n=100</i>	<i>n=69</i>	<i>n=35</i>	<i>n=107</i>	<i>n=145</i>
<i>Average no. initiatives</i>	3.8	4.0	4.2	4.1	3.9	3.3	4.2
Improved business processes to improve efficiency	50%	52%	53%	49%	40%	46%	53%
Developed new product/services specifically for export markets	44%	43%	55%	45%	46%	36%	51%
Enhanced marketing through online channels	42%	32%	47%	57%	31%	36%	46%
Hired new staff or trained existing staff to encourage innovation across the organisation	40%	35%	40%	59%	40%	29%	48%
Entered new markets	37%	42%	36%	35%	31%	32%	41%
Contacted Pacific Trade Invest for assistance	34%	50%	44%	25%	23%	36%	32%
Implemented new technology platforms	30%	27%	31%	33%	49%	27%	32%
Allocated more time and money to drive innovation	30%	29%	35%	39%	31%	24%	34%
Improved ecommerce capabilities	27%	25%	32%	29%	37%	21%	31%
Repositioned the business to align with export markets	25%	35%	25%	19%	31%	21%	28%
Improved speed of delivery	24%	29%	19%	22%	29%	22%	26%



DIGITAL MARKETING

Online Channel Usage

As per previous years, the most common online channels used by businesses to generate export revenue

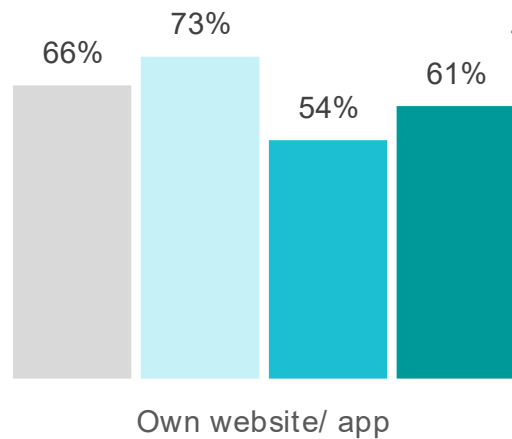
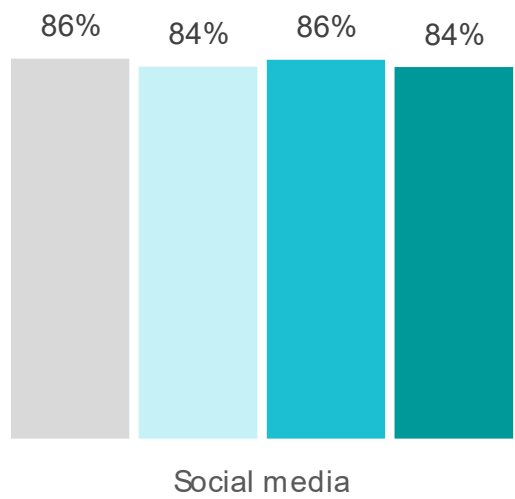
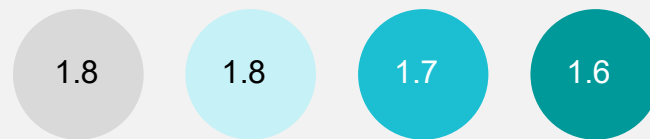
are social media, followed by owned websites, and third party websites and apps.

WHICH OF THE FOLLOWING ONLINE CHANNELS DOES YOUR BUSINESS USE TO GENERATE EXPORT REVENUE?

(Among exporters who generate revenue through online channels)

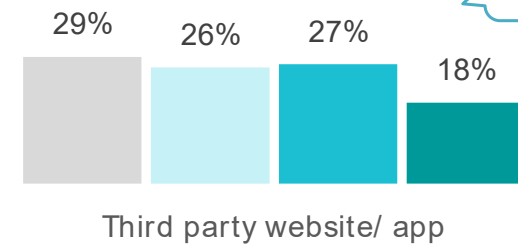
AVG. NUMBER OF CHANNELS USED:

2018 2020 2022 2024



Skew towards:

- Tourism (75%)
- Mature exporters (75%)



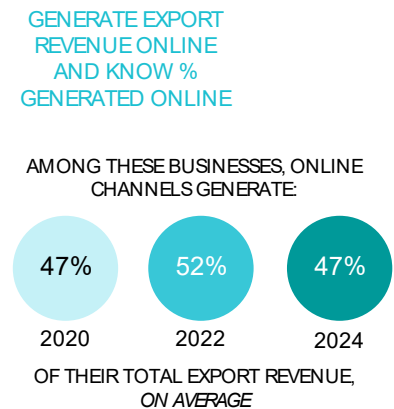
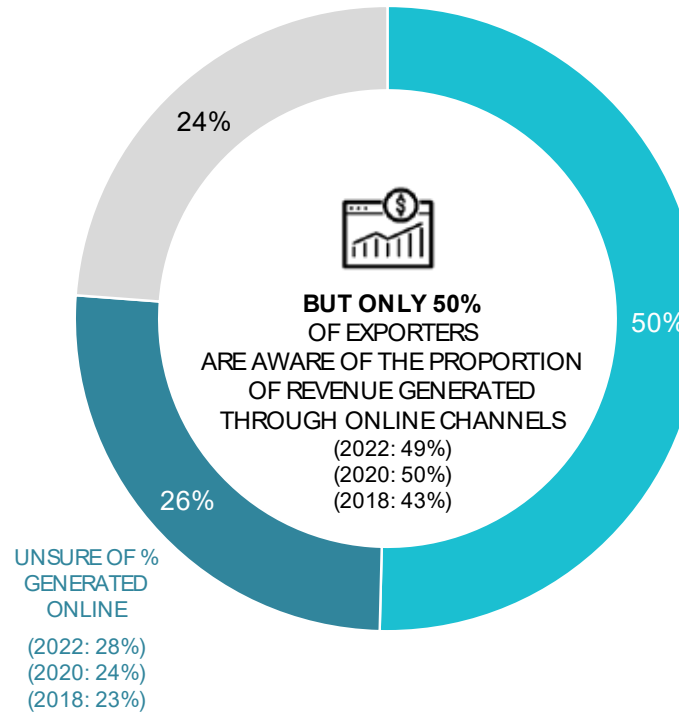
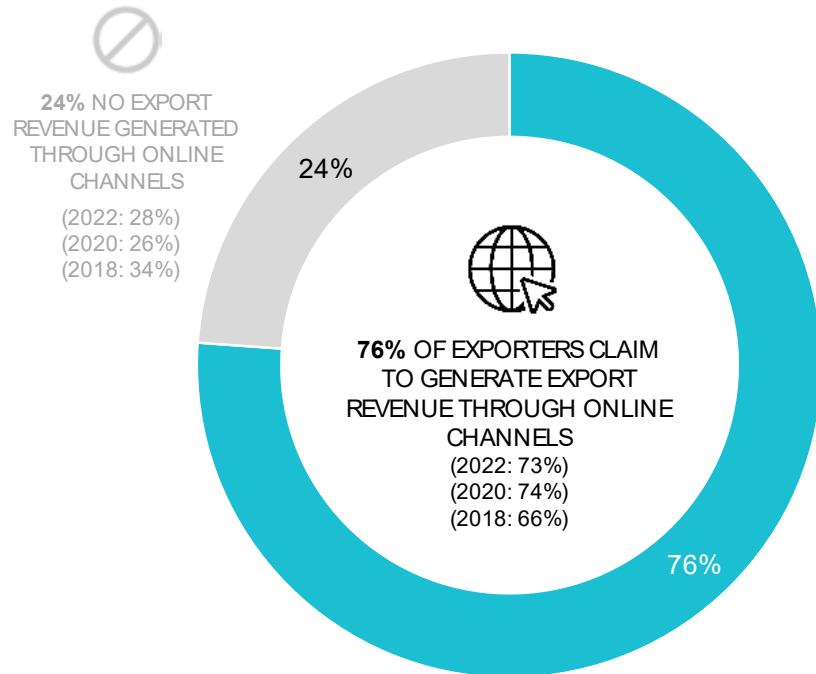
Skew towards:

- Tourism (33%)

Export Revenue Generated through Online Channels

Over three quarters of exporters utilise online channels to generate export revenue, a slight increase from last year.

APPROXIMATELY, WHAT PERCENTAGE OF YOUR EXPORT REVENUE IS GENERATED THROUGH ONLINE CHANNELS?



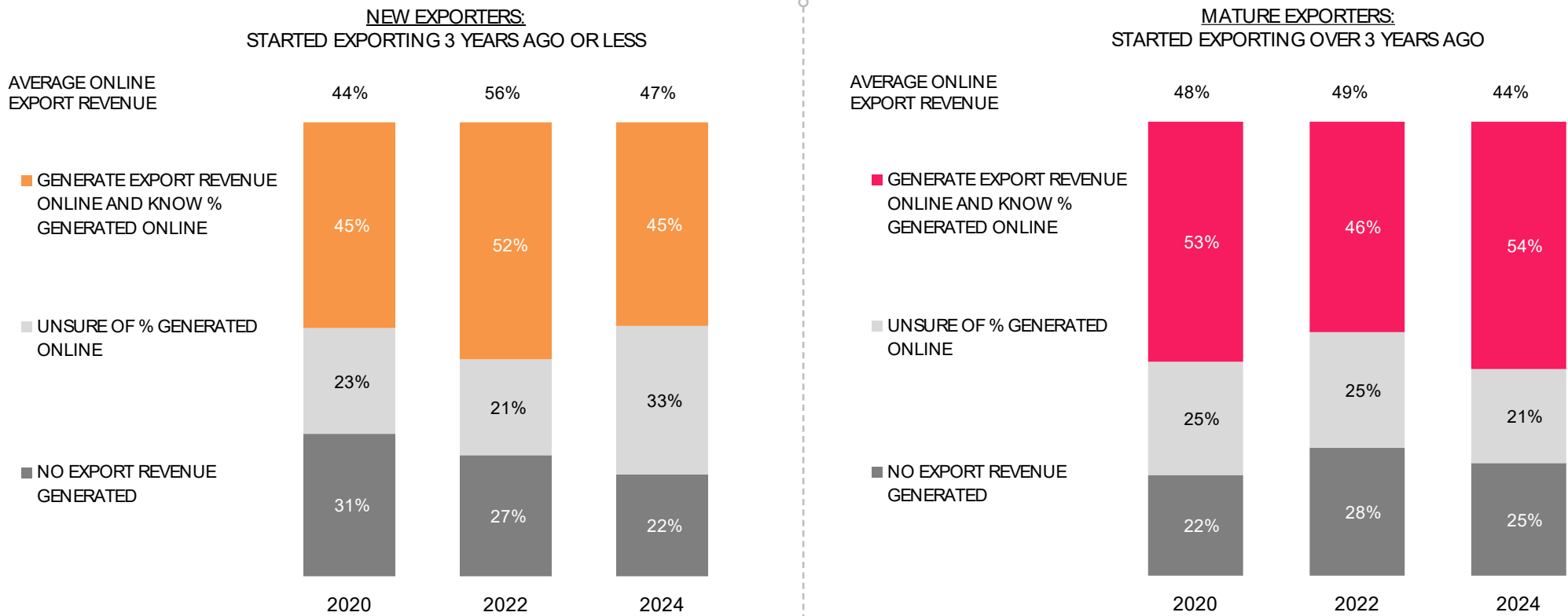
Export Revenue Generated through Online Channels

BY INDUSTRY AND MATURITY

There has been a significant increase in the proportion of revenue generated by mature exporters through online

channels, while nearly a third of new exporters are unsure of how much they are generating via online channels.

APPROXIMATELY, WHAT PERCENTAGE OF YOUR EXPORT REVENUE IS GENERATED THROUGH ONLINE CHANNELS?



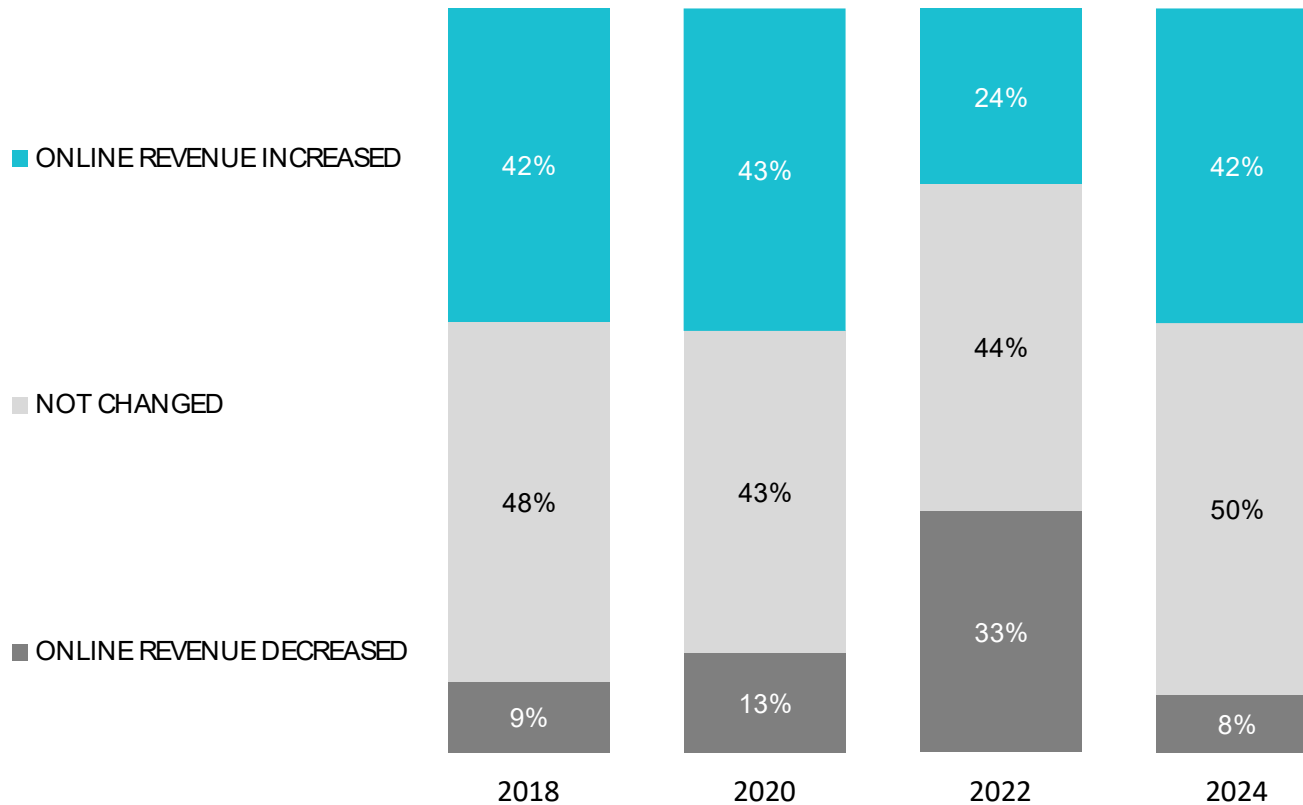
Export Online Revenue Change over the last 12-months

The proportion of businesses whose online revenue has increased is back up in line with pre-pandemic levels. Less than 1-in-10 businesses who

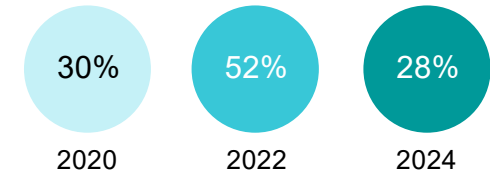
generate revenue online have seen a decline over the past 12 months.

HOW HAS YOUR EXPORT REVENUE GENERATED THROUGH ONLINE CHANNELS CHANGED OVER THE PAST 12 MONTHS?

(Among exporters who generate revenue through online channels)

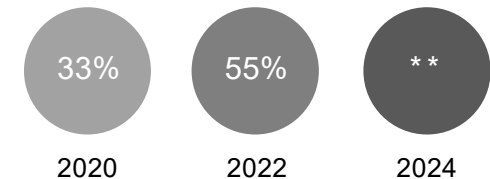


ON AVERAGE, EXPORTERS REVENUE INCREASED BY:



OVER THE LAST 12 MONTHS

ON AVERAGE, EXPORTERS REVENUE DECREASED BY:



OVER THE LAST 12 MONTHS

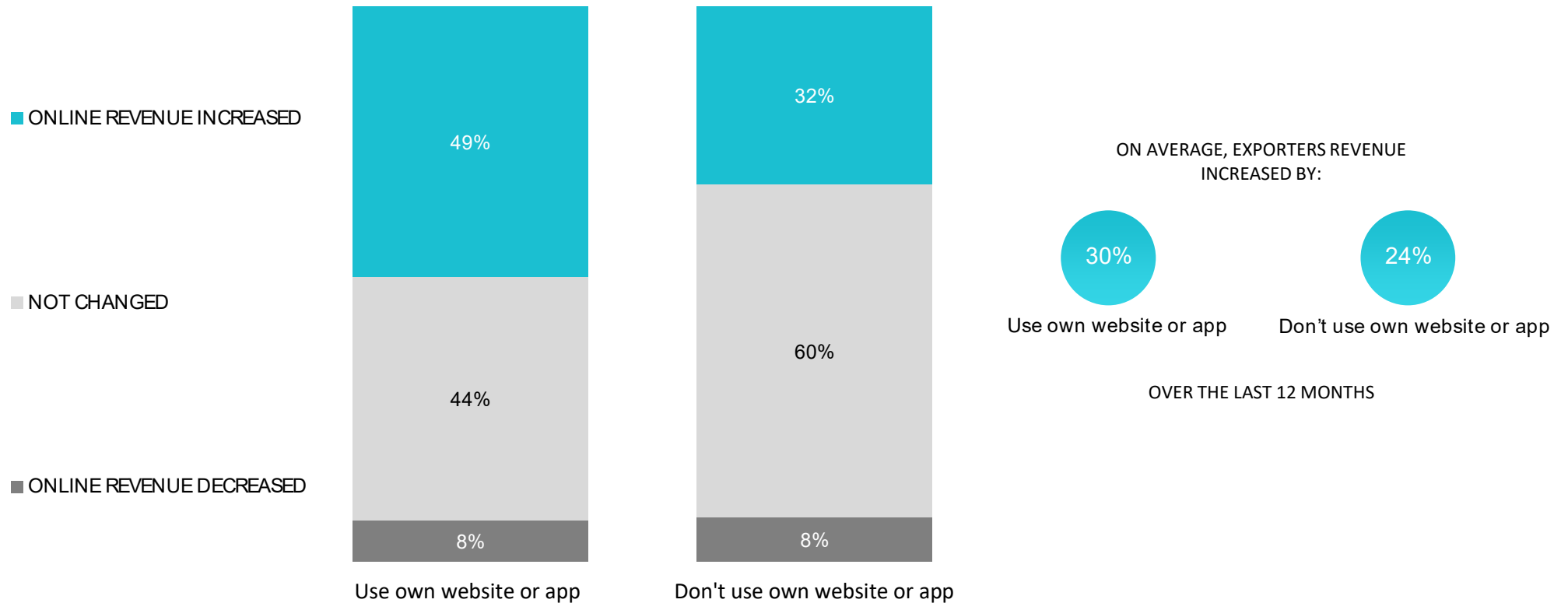
Export Online Revenue Change over the last 12-months

BY CHANNEL

Businesses utilising their own website or app are more likely to have seen their online revenue increase over the last 12 months.

HOW HAS YOUR EXPORT REVENUE GENERATED THROUGH ONLINE CHANNELS CHANGED OVER THE PAST 12 MONTHS?

(Among exporters who generate revenue through online channels)



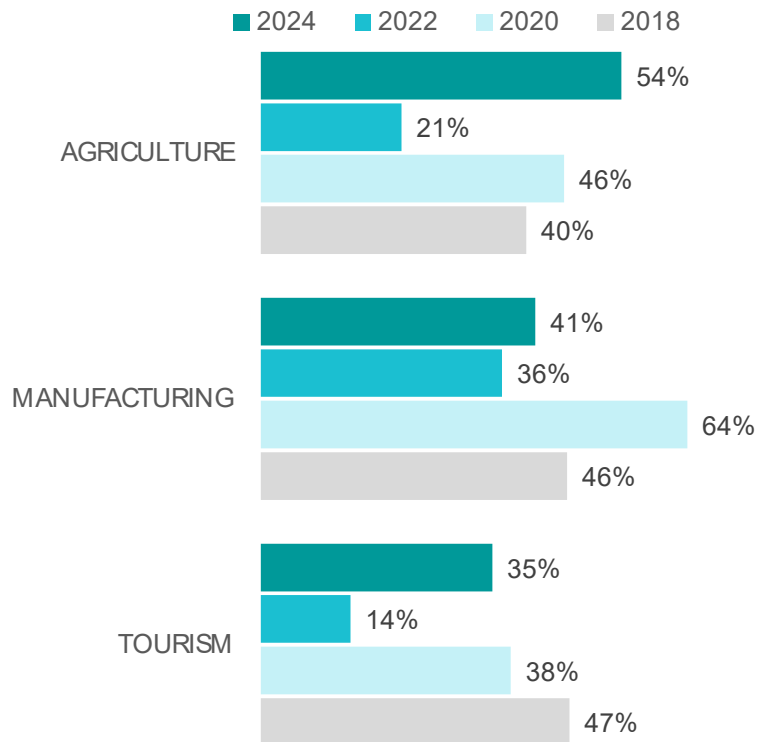
Export Online Revenue Change over the last 12-months

BY INDUSTRY

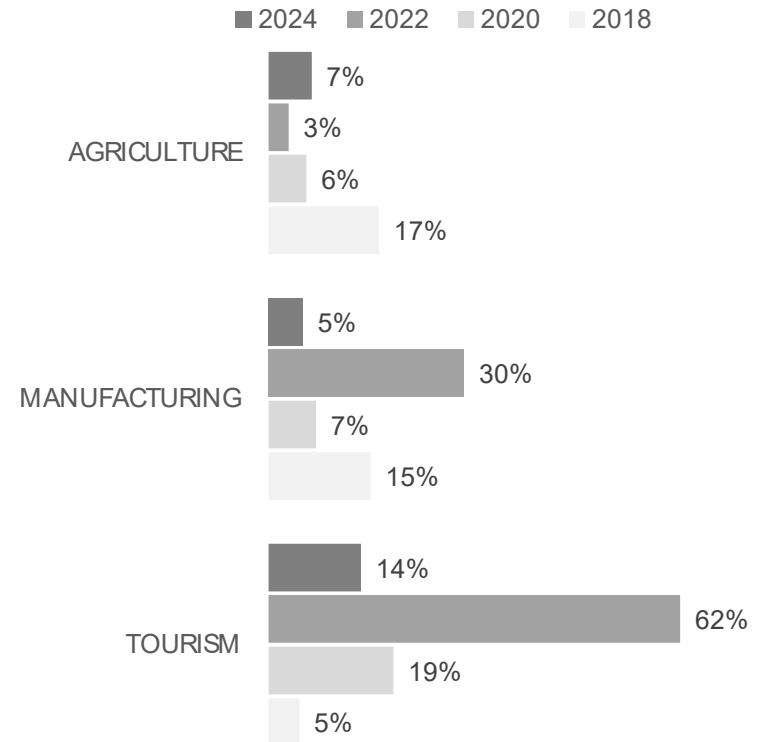
The most significant increases in online export revenue are being experienced by the agriculture and manufacturing industries.

HOW HAS YOUR EXPORT REVENUE GENERATED THROUGH ONLINE CHANNELS CHANGED OVER THE PAST 12 MONTHS?

ONLINE EXPORT REVENUE **INCREASED** OVER PAST 12 MONTHS



ONLINE EXPORT REVENUE **DECREASED** OVER PAST 12 MONTHS

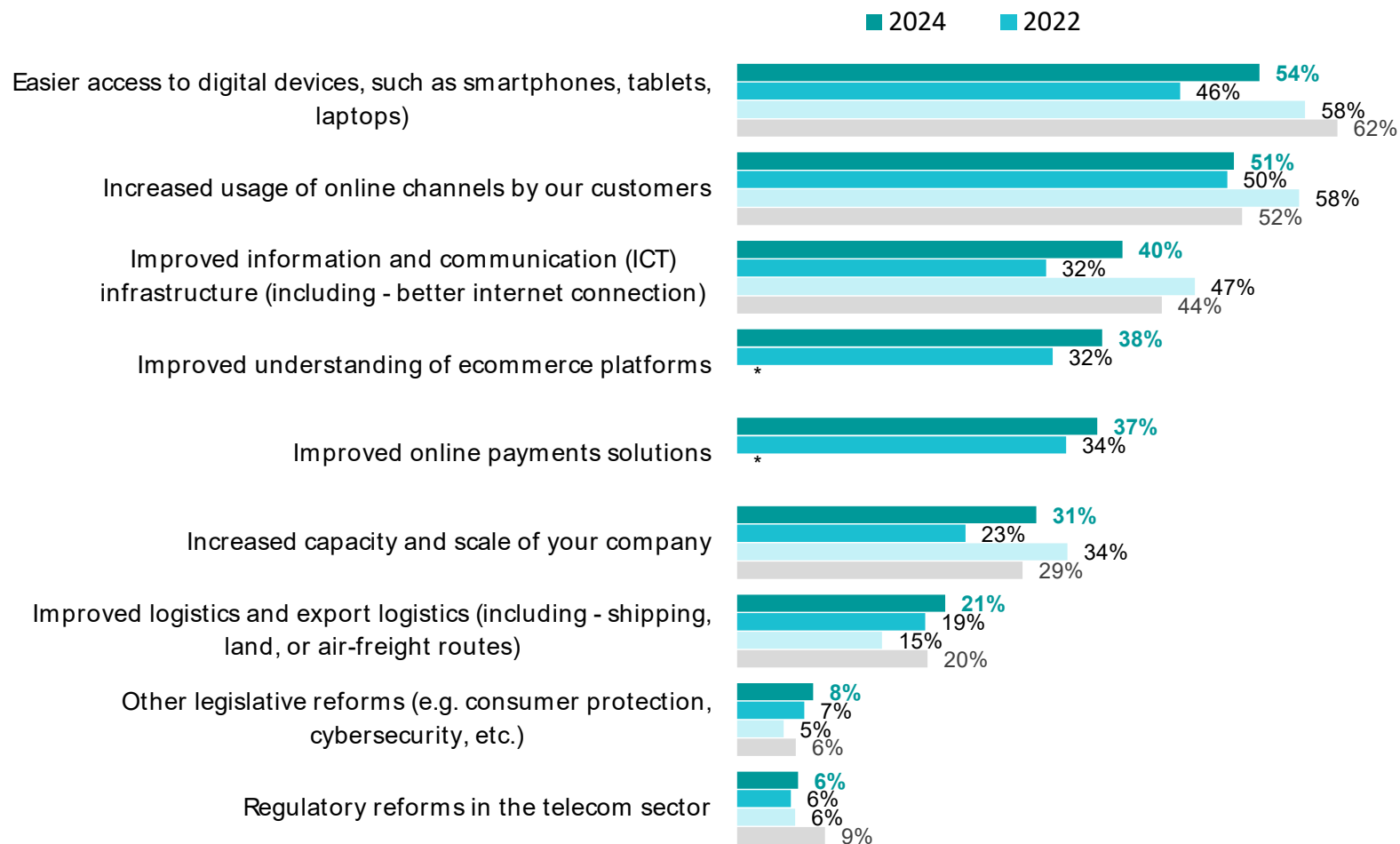


Positive Factors Impacting Online Revenue

Exporters point to a range of factors positively impacting online revenue generation. Most notably easier access to digital devices and increased online use by customers. This year has

seen a significant rise in exporters also crediting improved information and communication infrastructure and increased capacity and scale of their company

FACTORS THAT HAVE POSITIVELY IMPACTED ONLINE REVENUE GENERATION



Positive Factors Impacting Online Revenue

BY INDUSTRY AND MATURITY

Service businesses credited easier access to digital devices as positively impacting online revenue, at a higher rate than other industries, while tourism businesses pointed to

increased online use by customers. Mature exporters noticed more factors creating a positive impact than new exporters.

FACTORS THAT HAVE POSITIVELY IMPACTED ONLINE REVENUE GENERATION

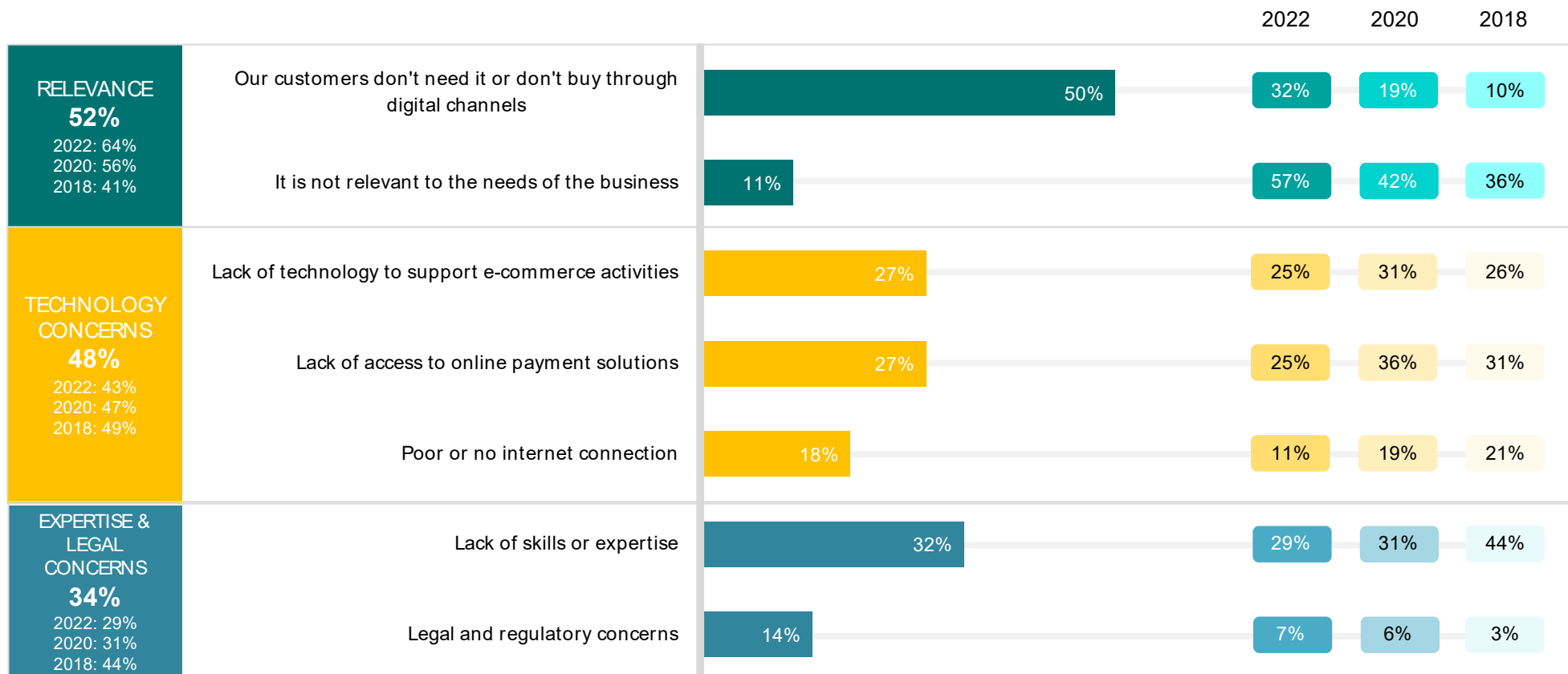
INITIATIVE	OVERALL	EXPORT AREA				EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
<i>Base n=</i>	<i>n=192</i>	<i>n=66</i>	<i>n=83</i>	<i>n=60</i>	<i>n=27</i>	<i>n=83</i>	<i>n=109</i>
Easier access to digital devices	54%	44%	57%	62%	67%	48%	58%
Increased usage of online channels by your customers	51%	42%	51%	70%	52%	47%	54%
Improved information and communication (ICT)	40%	38%	33%	45%	59%	33%	45%
Improved understanding of ecommerce platforms	38%	32%	42%	37%	41%	35%	39%
Improved online payments solutions	37%	39%	37%	38%	44%	31%	41%
Increased capacity and scale of your company	31%	38%	29%	33%	26%	23%	37%
Improved logistics and export logistics	21%	29%	20%	8%	30%	20%	22%
Other legislative reforms	8%	6%	5%	13%	15%	8%	7%
Regulatory reforms in the telecom sector	6%	5%	5%	8%	15%	7%	6%
<i>Avg. number of positive factors mentioned</i>	<i>2.9</i>	<i>2.7</i>	<i>2.8</i>	<i>3.2</i>	<i>3.5</i>	<i>2.6</i>	<i>3.1</i>

Reasons for not using Online Channels

The proportion of businesses generating revenue online continues to grow, but for those not doing so, key justifications include lack of relevance to customers, lack technology support,

and lack of access to online payment solutions. Citing lack of relevance to the needs of the business has dropped significantly over the years.

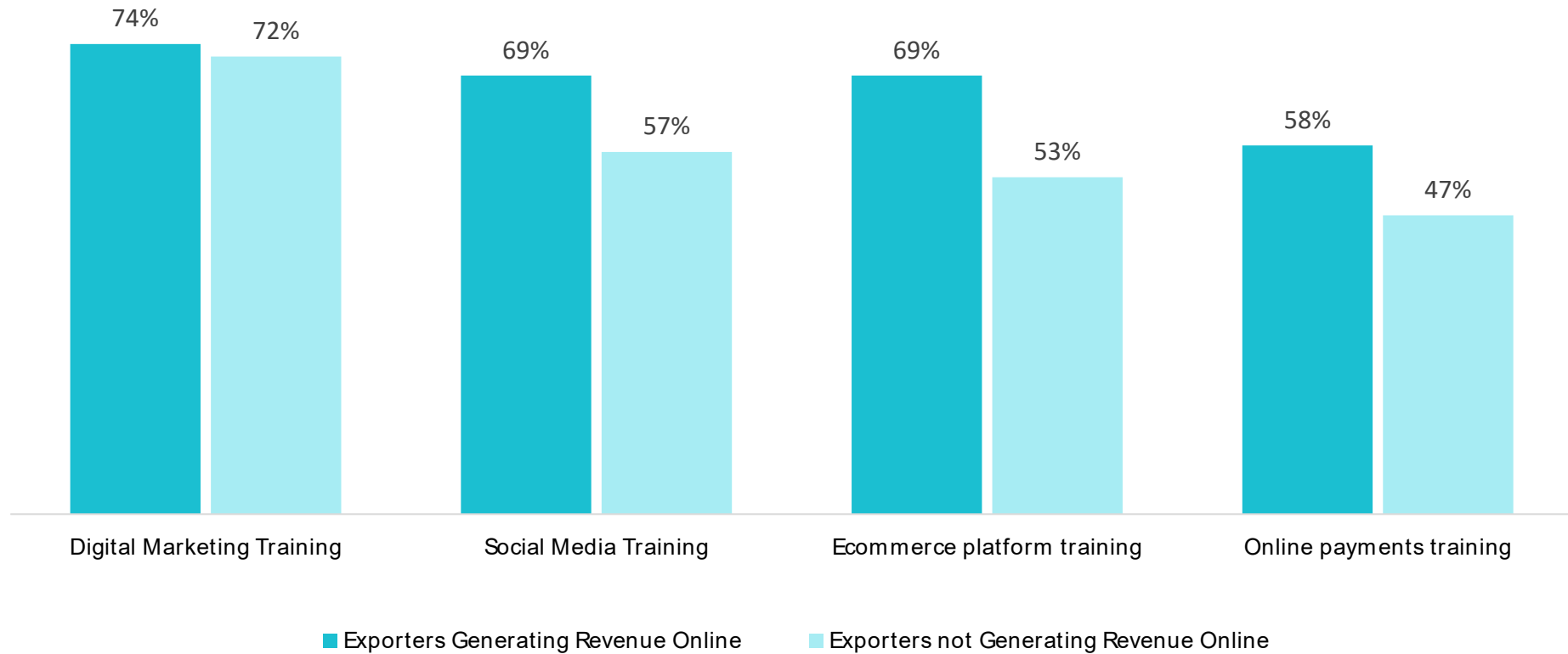
WHY DOES YOUR ORGANISATION NOT USE ANY ONLINE/DIGITAL CHANNELS TO GENERATE EXPORT REVENUE?



Benefit from Ecommerce Capacity Building Opportunities

For businesses already generating revenue online, the call for further training is significant.

WHY DOES YOUR ORGANISATION NOT USE ANY ONLINE/DIGITAL CHANNELS TO GENERATE EXPORT REVENUE?



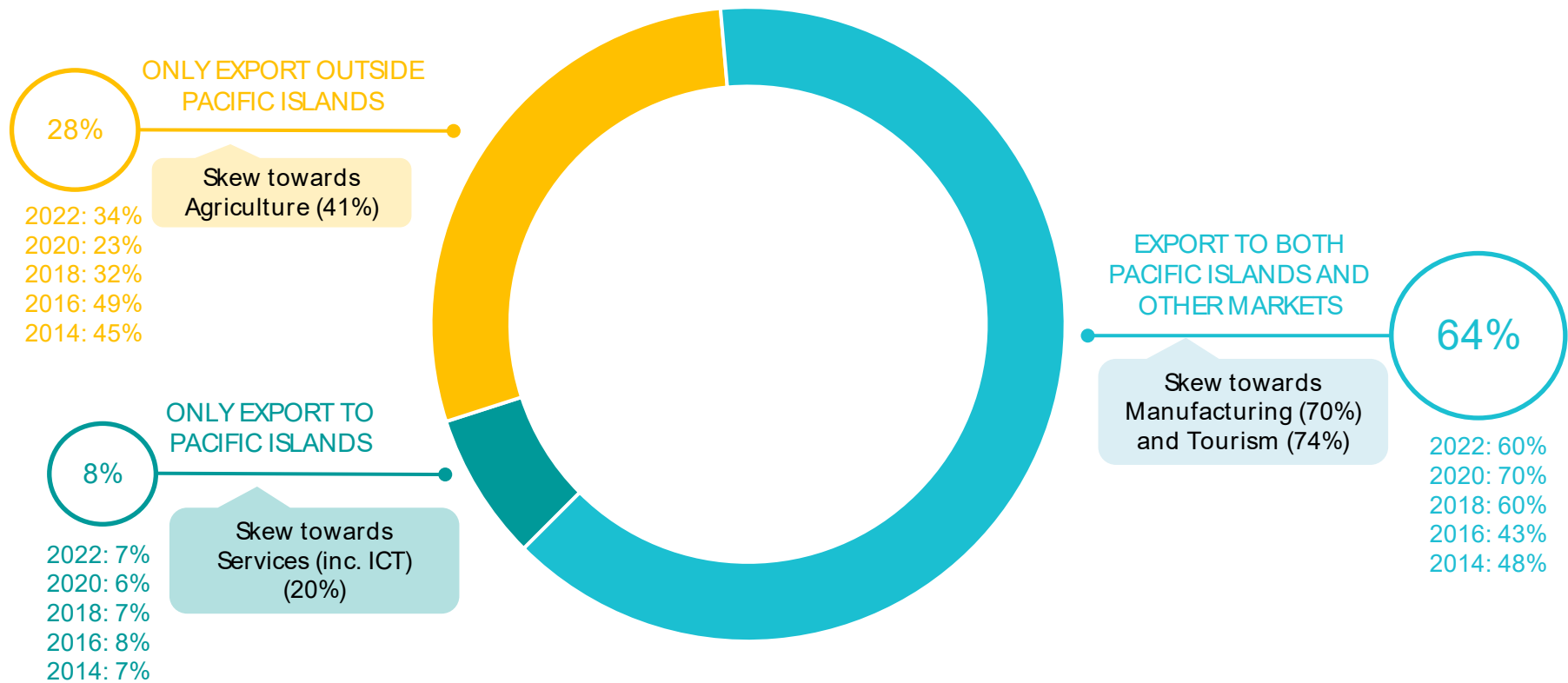


EXPORT DESTINATIONS

Markets Exported to over the last 12-months

Since tracking began in 2014, there has been a gradual shift towards more businesses including other Pacific Islands to their export markets.

WHICH GEOGRAPHIC AREAS DID YOUR COMPANY GENERATE EXPORT REVENUE OVER THE PAST 12 MONTHS?

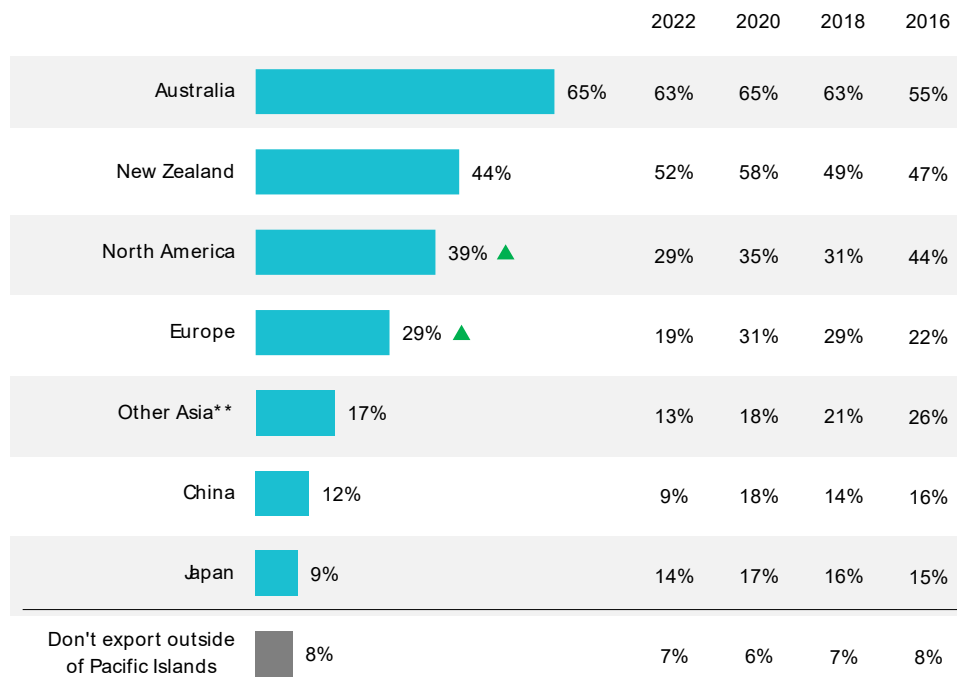


Geographic Areas Generating Export Revenue over the last 12-months

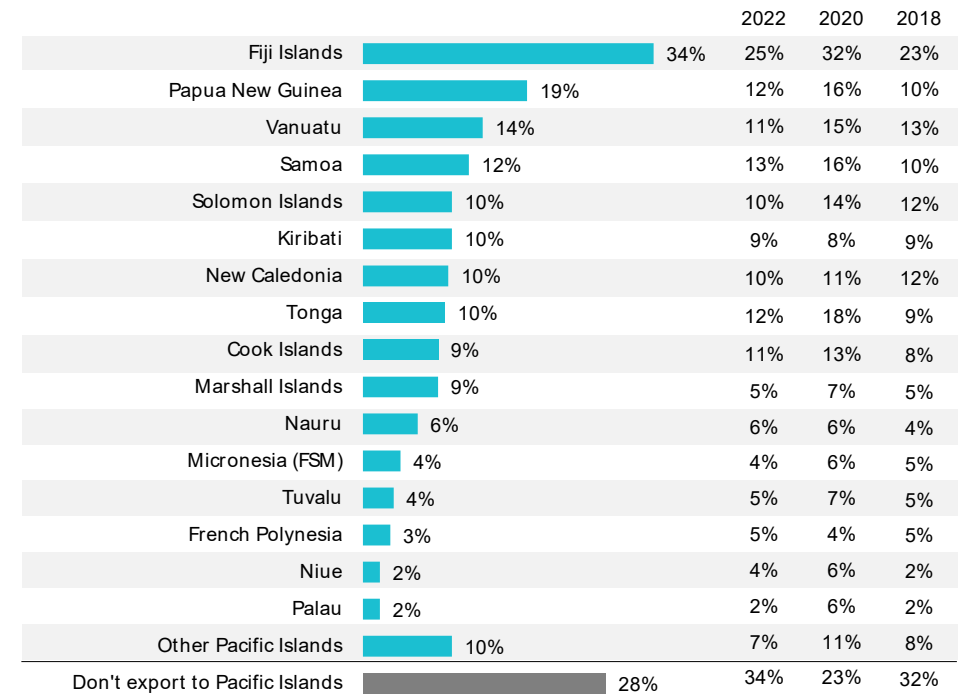
Australia and New Zealand remain key export destinations, although the respondents report generating export revenue from New Zealand has decreased since 2022. Exports to

North America and Europe are back up pre-pandemic levels. With the Pacific, exports to Fiji and Papua New Guinea has increased.

EXPORTING OUTSIDE OF PACIFIC ISLANDS



EXPORTING WITHIN PACIFIC ISLANDS



Countries Exported to outside the Pacific Islands

BY INDUSTRY AND MATURITY

The proportion of businesses generating revenue from Australia, New Zealand, North America and Europe is significantly higher amongst tourism companies.

New exporters generate revenue from fewer regions than mature exporters.

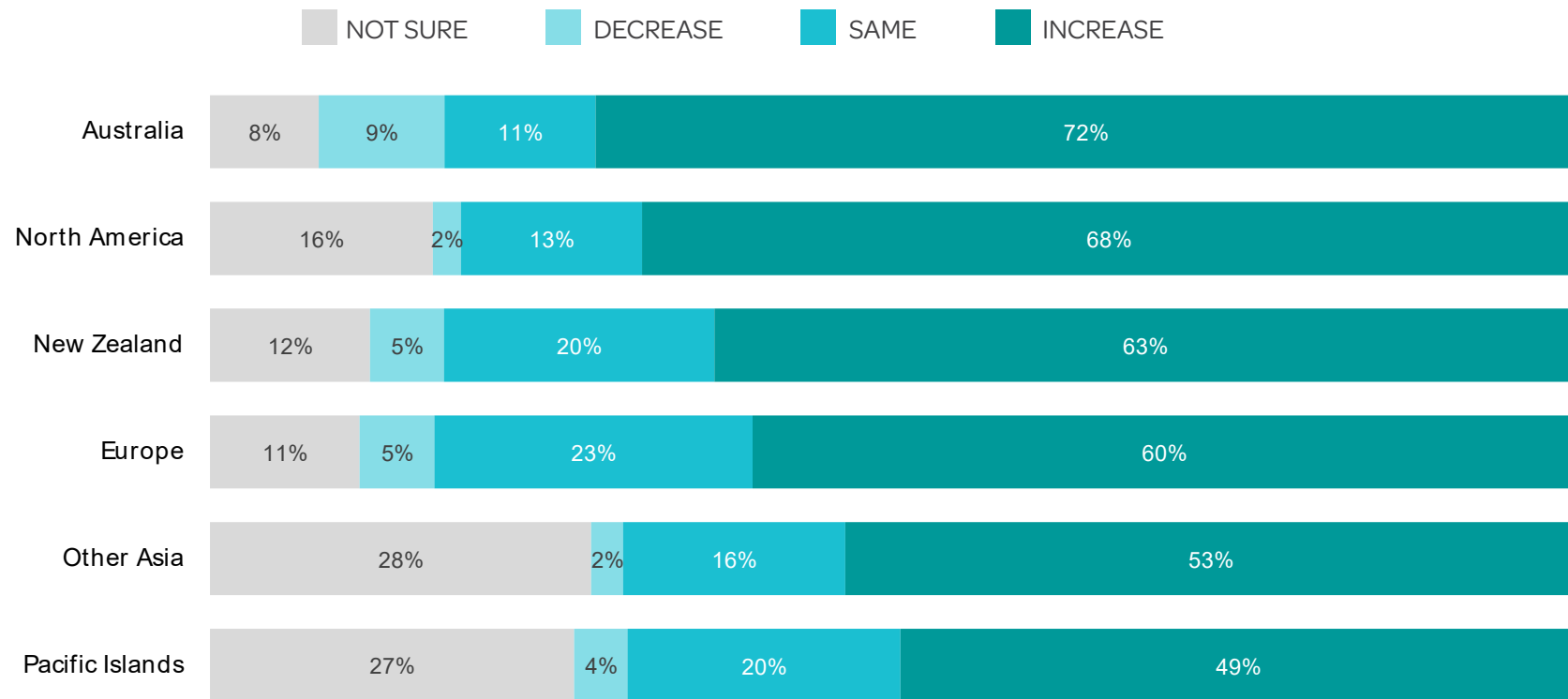
WHICH GEOGRAPHIC AREAS DID YOUR COMPANY GENERATE EXPORT REVENUE OVER THE PAST 12 MONTHS?

COUNTRIES EXPORTED TO	OVERALL	EXPORT AREA				EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
<i>Base n=</i>	<i>n=252</i>	<i>n=101</i>	<i>n=100</i>	<i>n=69</i>	<i>n=35</i>	<i>n=107</i>	<i>n=145</i>
Australia	65%	58%	67%	77%	54%	54%	72%
New Zealand	44%	41%	48%	58%	40%	31%	54%
North America	39%	32%	42%	57%	20%	28%	47%
Europe	29%	22%	24%	48%	23%	21%	35%
Other Asia	17%	23%	15%	12%	9%	11%	21%
China	12%	7%	14%	16%	17%	8%	14%
Japan	9%	10%	13%	9%	6%	5%	12%
India & South Asia	3%	2%	2%	1%	6%	3%	3%
NET Pacific Islands	72%	59%	80%	77%	83%	76%	68%
<i>Avg. number of regions (2024)</i>	2.9	2.6	3.1	3.6	2.6	2.4	3.3
<i>Avg. number of regions (2022)</i>	2.7	2.6	3.0	2.6	<i>(Base in 2022 too low)</i>	2.7	2.7

Expectations of Export Revenue from Overseas Markets in the next 12 months

Exporters are expecting an increase of orders or revenue from most overseas markets, predominantly Australia and North America.

HOW WILL EXPORT REVENUE (INCLUDING REVENUE FROM OVERSEAS VISITORS) CHANGE OVER THE NEXT 12 MONTHS FOR THE FOLLOWING...?

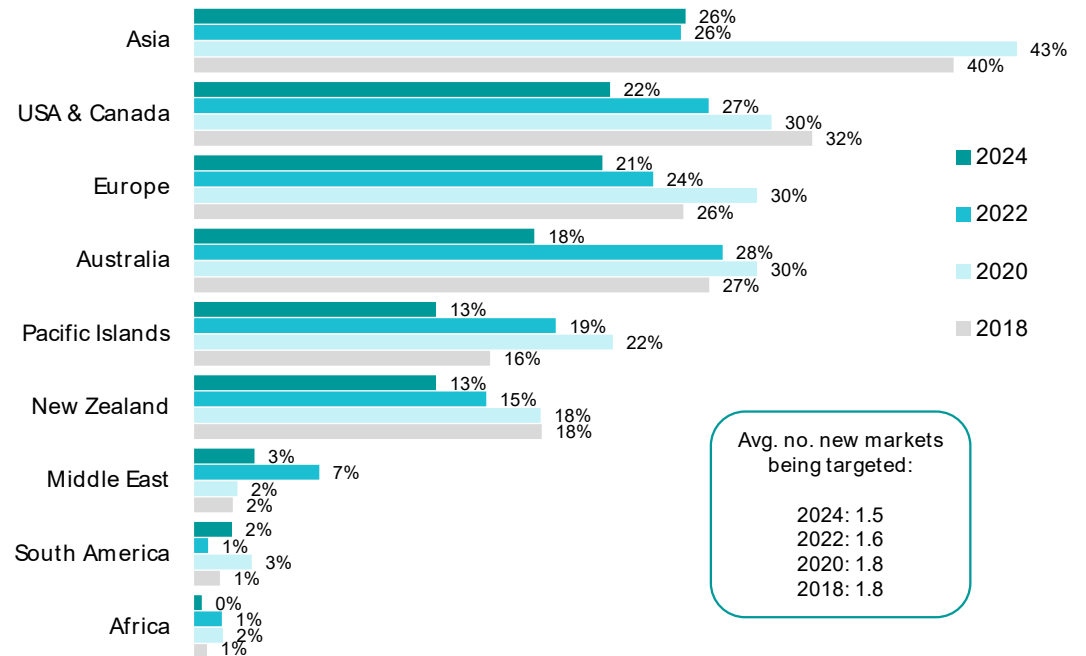
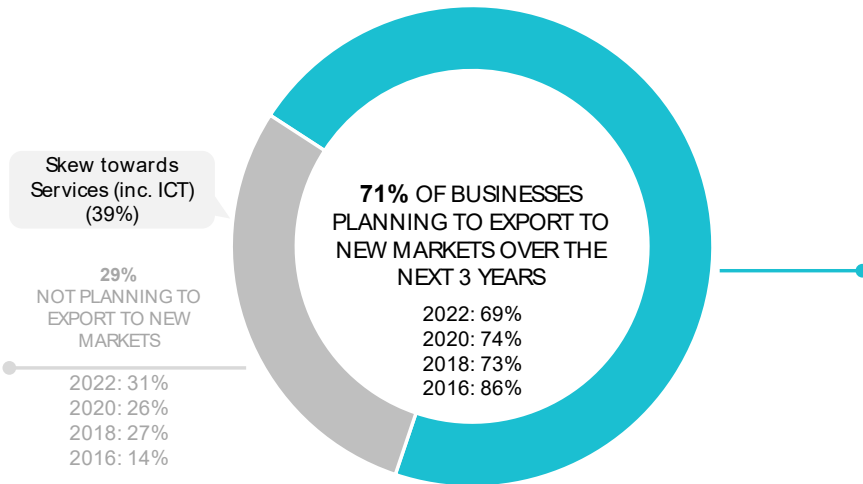


Entering New Markets over the next 3 years

Seven out of ten exporters are targeting new markets in the next three years. The proportion of businesses targeting Asia is in line with 2022, while

fewer business are targeting North America and Australia for the first time compared to 2022.

WHAT NEW MARKETS WILL YOU TARGET OVER THE NEXT 3 YEARS?



Avg. no. new markets being targeted:

2024: 1.5
2022: 1.6
2020: 1.8
2018: 1.8



Paradise Island, Fiji

BARRIERS TO EXPORTING

Barriers to Exporting

Cost of export and challenges with export logistics remain the highest barriers to export, although the proportion of businesses citing these has returned to pre-pandemic levels.

More businesses have pointed to lack of ecommerce capability to service overseas customers and domestic economic conditions as barriers, compared to 2022.

WHAT ARE THE MAIN BARRIERS TO EXPORTING OR SELLING YOUR PRODUCTS/SERVICES TO OVERSEAS CUSTOMERS OR VISITORS?

Export Barrier	2024	2022	2020	2018
Cost to export	46%	52%	46%	46%
Challenges with export logistics	40%	48%	38%	39%
Challenges with supply chain	34%	28%	<i>Statement added in 2022</i>	<i>Statement added in 2022</i>
Lack of marketing capability to attract overseas customers	33%	33%	<i>Statement added in 2022</i>	<i>Statement added in 2022</i>
Access to finances or capital to support export activities	33%	34%	38%	46%
Labour issues	29%	26%	26%	33%
Capacity constraints	26%	25%	24%	35%
International competition	25%	26%	33%	28%
Lack of ecommerce capability to service overseas customers	24%	18%	28%	23%
Domestic economic conditions	24%	18%	23%	21%
Government policies	23%	24%	24%	24%
Effects from natural disasters and extreme weather events	22%	25%	25%	28%
Difficulty setting competitive pricing	21%	25%	30%	19%
Currency exchange rates	21%	19%	21%	21%
Cost of raw materials	21%	27%	19%	20%
Maintaining consistent production or supply	21%	21%	21%	29%
High import tariffs in target markets	12%	16%	18%	11%
Concerns about getting paid	12%	18%	12%	10%
Interest rates or cost of credit	10%	15%	15%	15%
Buy now pay later options not available in our region	7%	12%	<i>Statement added in 2022</i>	<i>Statement added in 2022</i>

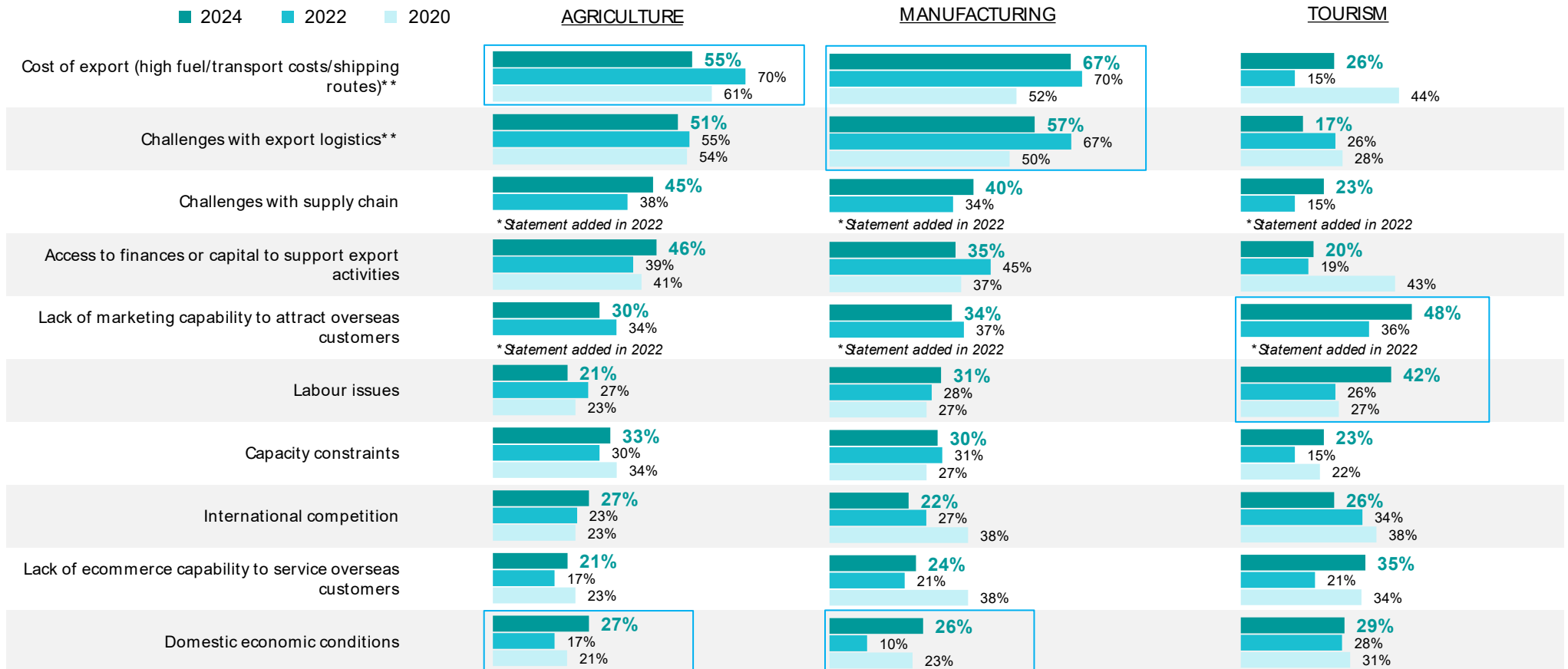
Top Ten Barriers to Exporting

BY INDUSTRY

Cost of export and export logistics remain the top barriers for agriculture and manufacturing companies, although the proportion of businesses citing these has declined since

2022. For tourism respondents, key challenges are a lack of marketing capability and labour issues, both of which are more of a barrier compared to 2022.

WHAT ARE THE MAIN BARRIERS TO EXPORTING OR SELLING YOUR PRODUCTS/SERVICES TO OVERSEAS CUSTOMERS OR VISITORS?



Top Ten Barriers to Exporting

BY INDUSTRY AND MATURITY

Copy: Mature exporters are particularly challenged by high export costs, challenges with export logistics and

labour issues. The latter is a barrier significantly less reported by new exporters.

WHAT ARE THE MAIN BARRIERS TO EXPORTING OR SELLING YOUR PRODUCTS/SERVICES TO OVERSEAS CUSTOMERS OR VISITORS?

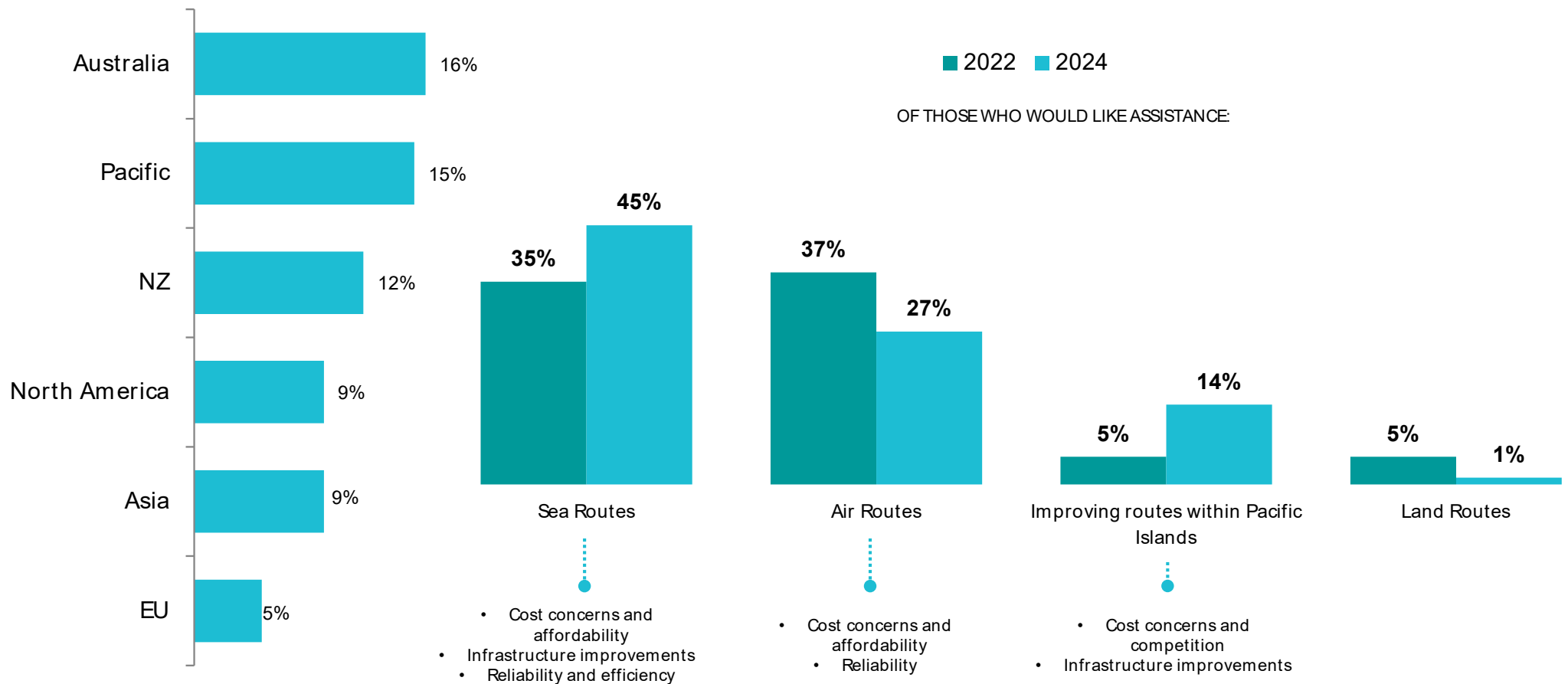
INITIATIVE	OVERALL	EXPORT AREA				EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INCL. ICT)	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
<i>Base n=</i>	<i>n=252</i>	<i>n=101</i>	<i>n=100</i>	<i>n=69</i>	<i>n=35</i>	<i>n=106</i>	<i>n=146</i>
Cost of export (high fuel/transport costs/shipping routes)**	46%	55%	67%	26%	45%	37%	52%
Challenges with export logistics**	40%	51%	57%	17%	36%	36%	43%
Challenges with supply chain	34%	45%	40%	23%	40%	35%	34%
Access to finances or capital to support export activities	33%	46%	35%	20%	33%	35%	31%
Lack of marketing capability to attract overseas customers	33%	30%	34%	48%	31%	28%	37%
Labour issues	29%	21%	31%	42%	36%	13%	40%
Capacity constraints	26%	33%	30%	23%	24%	27%	26%
International competition	25%	27%	22%	26%	30%	21%	27%
Lack of ecommerce capability to service overseas customers	24%	21%	24%	35%	28%	18%	29%
Domestic economic conditions	24%	27%	26%	29%	27%	22%	25%

Assistance Needed for Improving Transport and Shipping Routes

The proportion of exporters citing they would like assistance with sea routes, and routes with the Pacific Islands

has increased since 2022, while requested assistance for air routes has decreased.

WHICH ROUTES (TO WHAT COUNTRY AND WHAT MODE OF TRANSPORT) SPECIFICALLY, WOULD YOU LIKE ASSISTANCE WITH?



ASSISTANCE NEEDED FOR IMPROVING TRANSPORT AND SHIPPING ROUTES

IMPROVED INFRASTRUCTURE

“Need assistance on domestic route, moving containers from Biiala, West New Britain Province to Kimbe main port in preparing for export shipment. Biiala is on the other side of the main wharf, and moving or freighting containers to the main wharf is very difficult”

PNG, Agriculture, 2-4 employees, <\$100k

“I need assistance with the PNG to Pohnpei route. There has been so much bureaucratic red tape, political influences and restricted trade policies experienced from my experience. I need assistance with open market access between these two countries”

PNG, Manufacturing, 1-4 employees

“There is no chiller facility at Tonga’s international airport and so our product, fresh whole fish, has to wait in the heat to be loaded onto the flight.”

Tonga, Agriculture, 51-100 employees, \$3-5 million

“(1) Internal PNG roads (Highlands Highway from Goroka to Lae and Highway from Madang to Highlands Highway) (2) PNG to Australia shipping frequency from Lae”

PNG, Other Services, 1-4 employees, \$100-499,999k

COST CONCERNS

“Air freight shipping rate to Australia is quite high and even though sea freight was a more cost-efficient option - with all the extra charges attached to sea freight – it’s less attractive to ship sea freight”

Fiji Islands, Agriculture, 5-10 employees, \$100-499,999k

“Need assistance with export from Samoa to NZ and Australia - with shipping original charges, freight and other shipping services/charges”

Samoa, Manufacturing, 11-20 employees, \$100-499,999k

“Fiji to Australia; Fiji to New Zealand; Fiji to the European Union; Fiji to North America. air transport. Shipping costs are too high! We have to compete with agricultural products from Thailand and Peru”

Fiji Islands, Agriculture, 21-50 employees, <\$100k

“We currently transport our goods from the East New Britain province of PNG to the capital city Port Moresby by air freight before we can then send to overseas (mostly Australia). The Airfreight from East New Britain is quite costly”

PNG, Manufacturing, 11-20 employees

“The two major parameters and challenges in the export sector for our company is cost / time. First of all, air-freight is absolutely out of the question for food goods. The current cost of air-freight is absurd and turn a \$9 product into a \$45 product”

Fiji Islands, Manufacturing, 1-4 employees, \$100-499,999k

“First of all transport to and from Fiji is the most expensive undertaking in the world so that is a deterrent in exporting. We concentrate on exporting to USA”

Fiji Islands, Agriculture, 5-10 employees, <\$100k

“Freight cost to Tonga is expensive due to lack of shipping services competition in the Tonga market”

Fiji Islands, Other Services, 21-50 employees, \$6-10 million

“I was exporting to the USA Kiribati and Marshall Islands. Airfreight and shipping line is too expensive. There are some routes that are cheap, but I must get a permit plus transshipment fees are too expensive for the buyer to order more kava from us.”

Solomon Islands, Agriculture, 11-20 employees, <\$100k

Assistance Needed to Encourage Increasing Export Activity

The top forms of assistance called for to increase export activity are assistance with marketing, export

grants and more competitive transport costs. These are largely in line with responses in recent years.

WHAT FORMS OF ASSISTANCE WOULD ENCOURAGE YOU TO INCREASE YOUR EXPORT ACTIVITY?

		2022	2020	2018
Assistance with marketing your business	49%	49%	45%	50%
Export grants	49%	51%	41%	43%
More competitive transport costs (shipping/land/air)	44%	48%	47%	51%
Better marketing of the Pacific Islands	42%	45%	41%	40%
Introduction to international target market buyers and customers	42%	42%	41%	46%
Financial support to offset high freight costs	42%	46%	* Statement introduced in 2022	
Introductions to international target market agents and distributors	42%	41%	36%	44%
Help improving export logistics (shipping/land/air)	35%	31%	38%	42%
More information on business opportunities	33%	36%	32%	35%
Better access to financial technology (e.g banking apps)	31%	30%	29%	25%
Assistance with trade finance	29%	36%	29%	34%
More free trade agreements	28%	30%	25%	29%
Help with ecommerce capability building	27%	30%	32%	33%
Better ICT infrastructure and regulatory framework	23%	32%	21%	22%

Assistance Needed to Encourage Increasing Export Activity

BY INDUSTRY AND MATURITY

Export grants would be most beneficial for agriculture companies and manufacturing companies, while

for tourism, 3-in-5 exporters seek assistance with marketing their business.

WHAT FORMS OF ASSISTANCE WOULD ENCOURAGE YOU TO INCREASE YOUR EXPORT ACTIVITY?

INITIATIVE	OVERALL	EXPORT AREA				EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)	NEW	MATURE
<i>Base n=</i>	<i>n=252</i>	<i>n=101</i>	<i>n=100</i>	<i>n=69</i>	<i>n=35</i>	<i>n=107</i>	<i>n=145</i>
Assistance with marketing your business	49%	48%	54%	62%	34%	45%	52%
Export grants	49%	66%	62%	30%	43%	49%	49%
More competitive transport costs (including shipping, land, or air-freight routes)	44%	50%	61%	26%	34%	40%	48%
Better marketing of the Pacific Islands	42%	45%	46%	42%	49%	44%	41%
Introduction to international target market buyers and customers	42%	51%	50%	39%	23%	42%	43%
Financial support to offset high freight costs	42%	58%	52%	23%	34%	39%	43%
Introductions to international target market agents and distributors	42%	46%	45%	43%	43%	39%	43%
Help improving export logistics (including shipping, land, or air-freight routes)	35%	45%	41%	12%	31%	36%	34%
More information on business opportunities	33%	35%	34%	35%	31%	37%	29%
Better access to financial technology (including banking apps and online payment solutions)	31%	25%	34%	35%	49%	31%	31%
Assistance with trade finance	29%	39%	33%	16%	23%	33%	27%
More free trade agreements	28%	35%	35%	16%	26%	30%	27%
Help with ecommerce capability building	27%	28%	33%	25%	29%	20%	32%
Better ICT infrastructure and regulatory framework to support ecommerce	23%	16%	25%	26%	37%	18%	26%



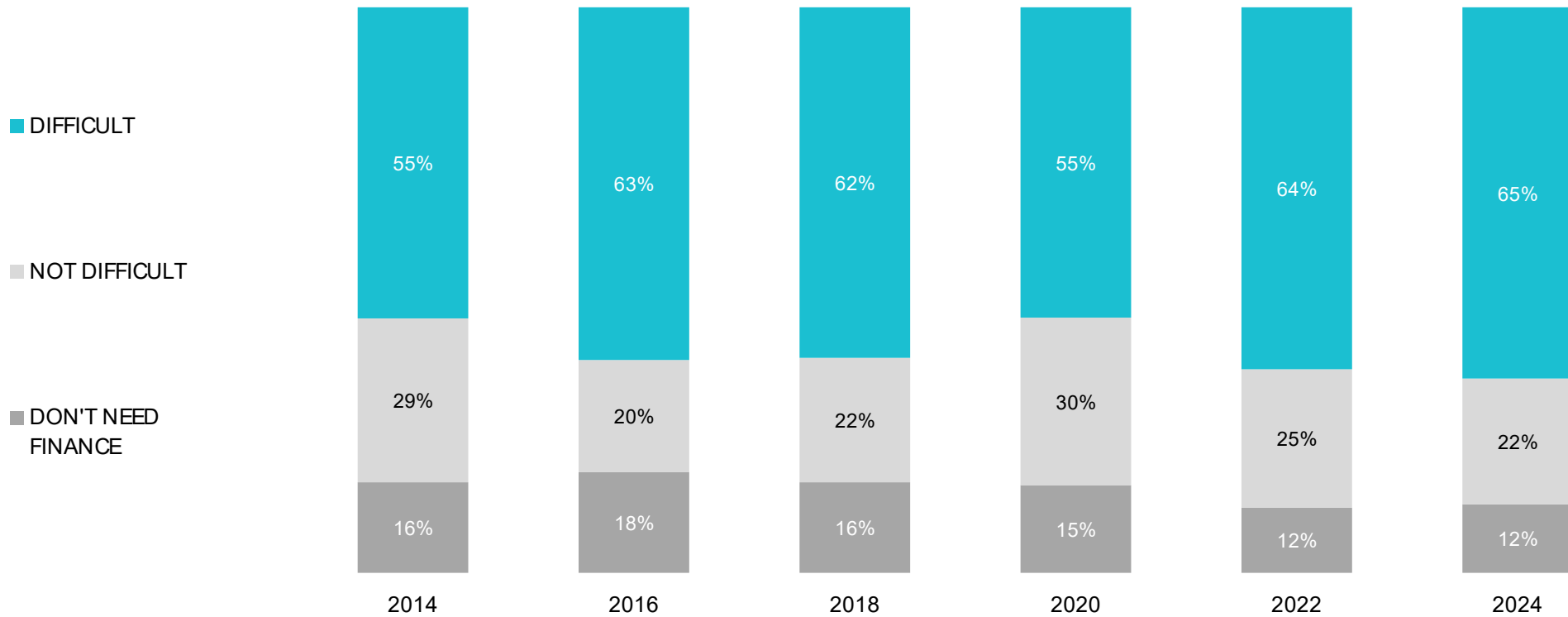
Coral islands, Fiji

FINANCE & INVESTMENT

Difficulty Obtaining Finance

Consistent with 2022, approximately two-thirds of exporters find it difficult to obtain finance.

IS IT DIFFICULT FOR YOUR BUSINESS TO OBTAIN FINANCE?



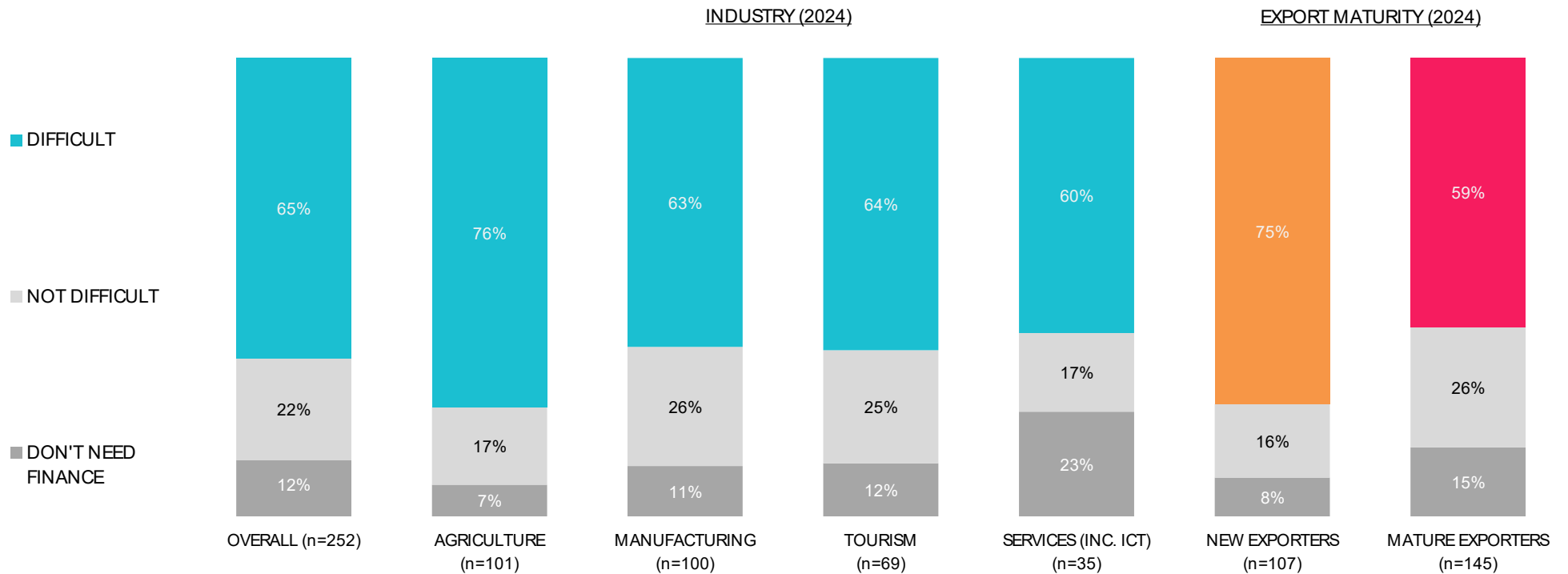
Difficulty Obtaining Finance

BY INDUSTRY AND MATURITY

Unsurprisingly, with newer less of a financial track record, new exporters find it more difficult to obtain finance. There is also a higher proportion

of agriculture businesses that find obtaining finance difficult when compared to other industries.

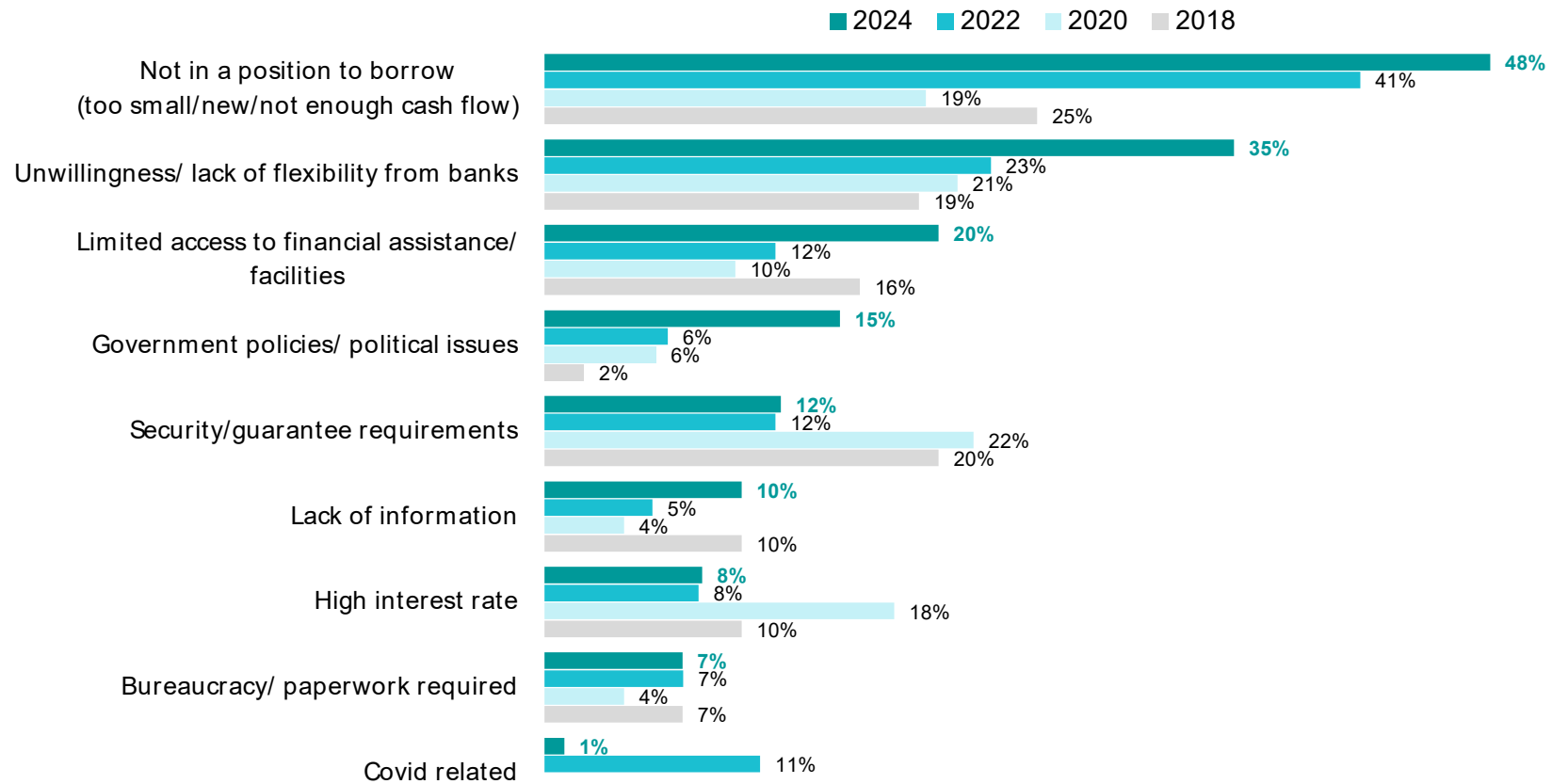
IS IT DIFFICULT FOR YOUR BUSINESS TO OBTAIN FINANCE?



Reasons for Difficulty Accessing Finance

As in 2022, not being in a position to borrow and the lack of flexibility from banks have again increased as reasons exporters find it difficult to obtain finance.

WHY DO YOU FIND IT DIFFICULT TO OBTAIN FINANCE?



REASON FOR DIFFICULTY - ACCESSING FINANCE

Not in position to borrow

“Lack of collateral to obtain loan or finance due to the type of business we do. Not many financiers are eager to loan to an agriculture export company because of the nature of our business and the general constraints faced by exporting in PNG.”

PNG, Agriculture, 1-4 employees, <\$100K

“High debt level. I took loans to start the businesses and while revenue is positive and looks good, I have to first bring down my current debt before I can obtain more finance to expand.”

Fiji Islands, ICT, 2-4 employees, <\$100K

Unwillingness/lack of flexibility from banks

“In the Cook Islands there are only three banks with limited appetite for lending, particularly for expansion.”

Cook Islands, Tourism, 201-300 employees, \$21-\$50M

“Not easily available to get. Criteria to obtaining agriculture finance is non-existent.”

PNG, Agriculture, 5-10 employees, <\$100K

“Its really hard for a small-scale business to be recognised by our local bank when ask for loan.”

Tonga, Agriculture, 2-4 employees

Limited access to finance assistance/ facilities

“I really don’t know where to seek assistance apart from High Interest Bank Loans.”

PNG, Agriculture, 21-50 employees, \$1- \$2M

“Lack of commercial lending agencies, cost of commercial loans very high. International donor agencies focus more towards infrastructure projects.”

Niue, ICT, 21-50 employees, \$3- \$5M)

“Grants and government support for private businesses is limited in Kiribati.”

Kiribati, Mining/Resources, 5-10 employees, <\$100K

Government policies / political issues

“As part of the main food industry sector in French Polynesia (Brasserie de Tahiti - Hinano beer), our government does not encourage the financial help to promote a driving force in our local market.”

French Polynesia, Consumer Goods Foods, 11-20 employees, \$100-\$499K

“Fishing industry in New Caledonia is not supported by the government. Agriculture receives 10 times more, even though the fishing industry provides 100% of the needs of the local population.”

New Caledonia, Fisheries, 21-50 employees, \$6 - \$10M

Security / guarantee requirements

“Too many requirements from financial institutions, collateral requirements for loan from farmers on customary owned land with no title.”

Fiji Islands, Agriculture, 5-10 employees, \$500-\$999K

“Fiji financiers require large amounts of security, including term deposits for use of credit cards or access to a payment gateway.”

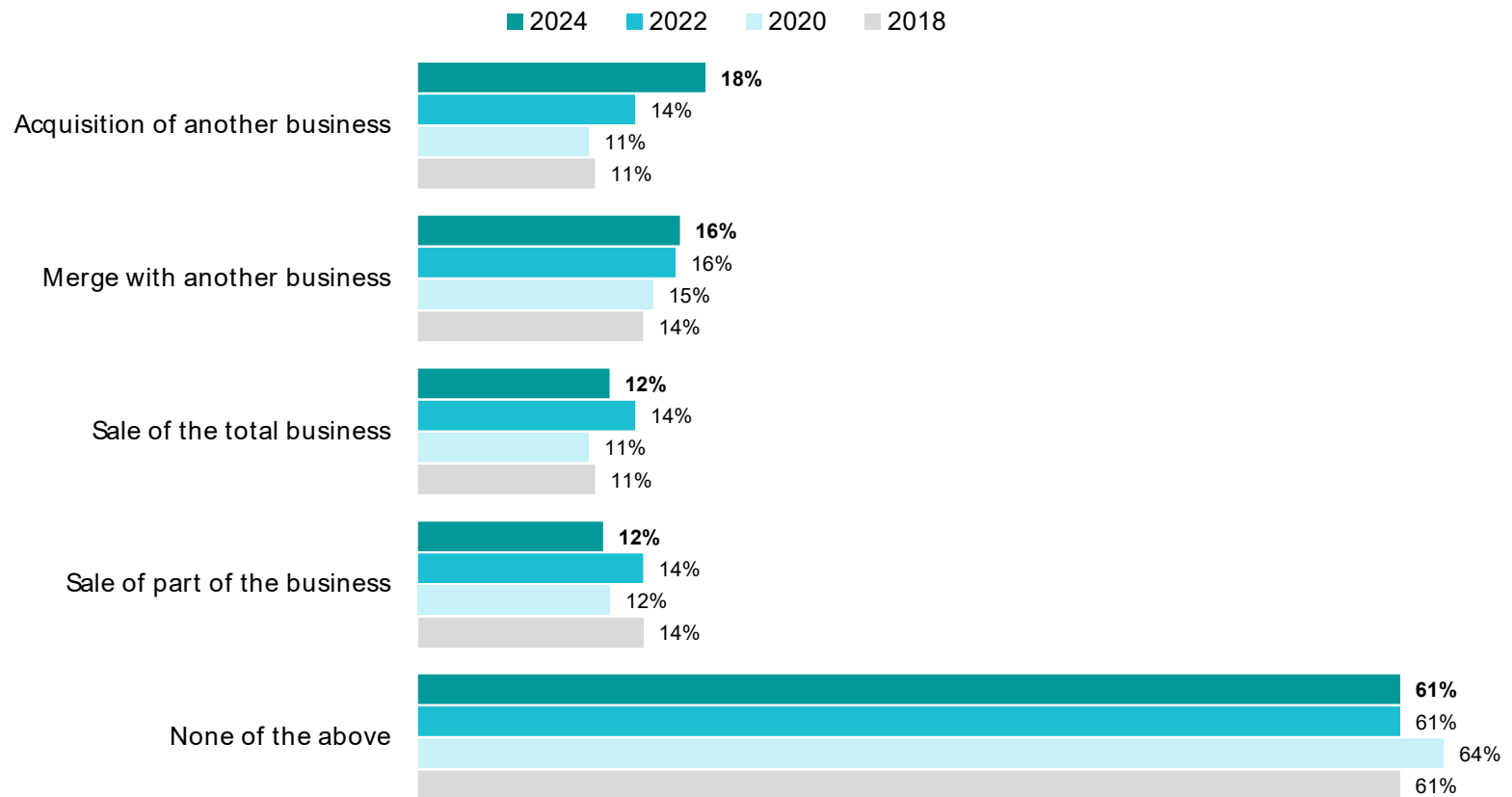
Fiji Islands, Manufacturing, 11-20 employees, \$3 - \$5M

“No collateral or security.”
Vanuatu, Fisheries, 5-10 employees, <\$100K

Consideration of Buying, Selling, or Seeking investment

There has been a slight uptick in the proportion of exporters who are considering acquiring another business.

ARE YOU CONSIDERING ANY OF THE FOLLOWING ACTIVITIES OVER THE NEXT 2 YEARS?





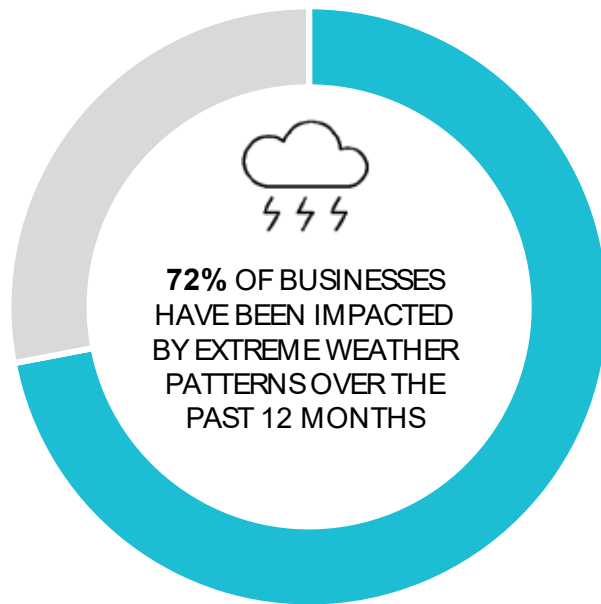
IMPACT OF EXTREME WEATHER PATTERNS

Impact of Extreme Weather Patterns

The proportion of businesses that have been impacted by extreme weather patterns is consistent with 2022. Extreme rainfall and storms are the

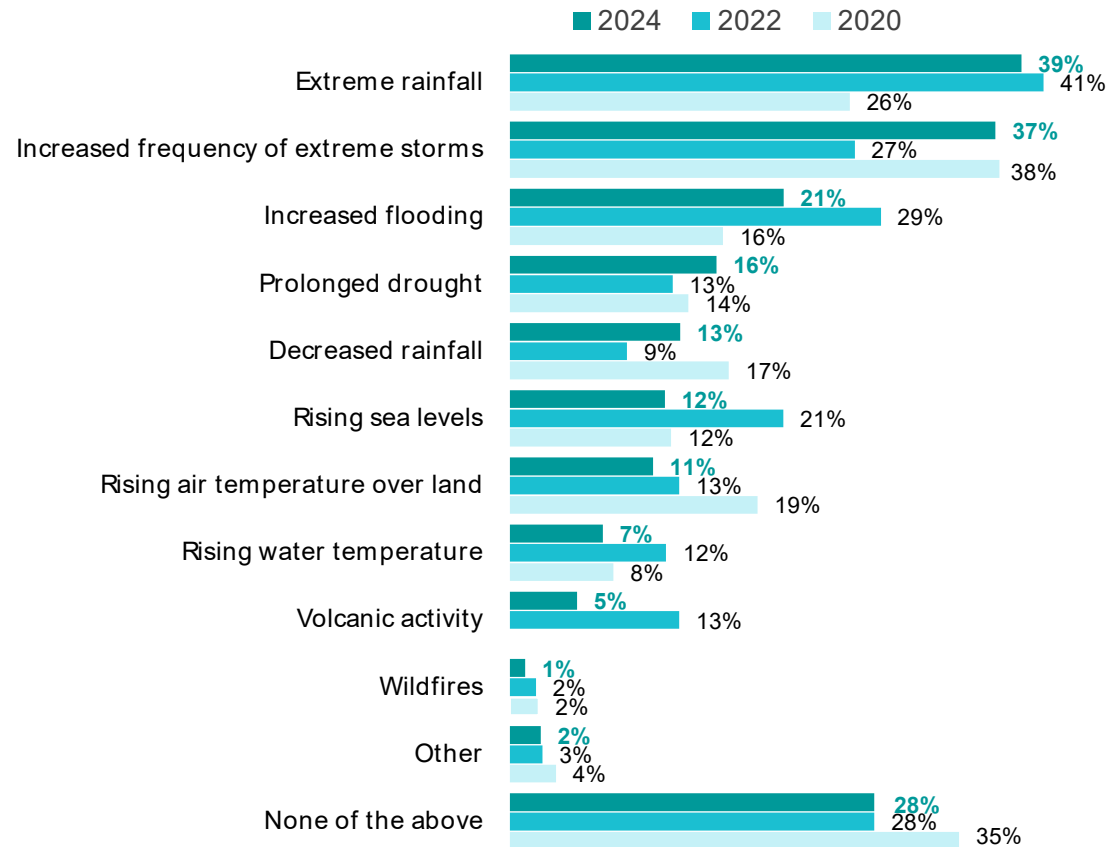
most commonly reported, with the latter increasingly significantly since 2022.

HAVE ANY OF THE FOLLOWING EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS OVER THE PAST 12 MONTHS?



2020: 69%

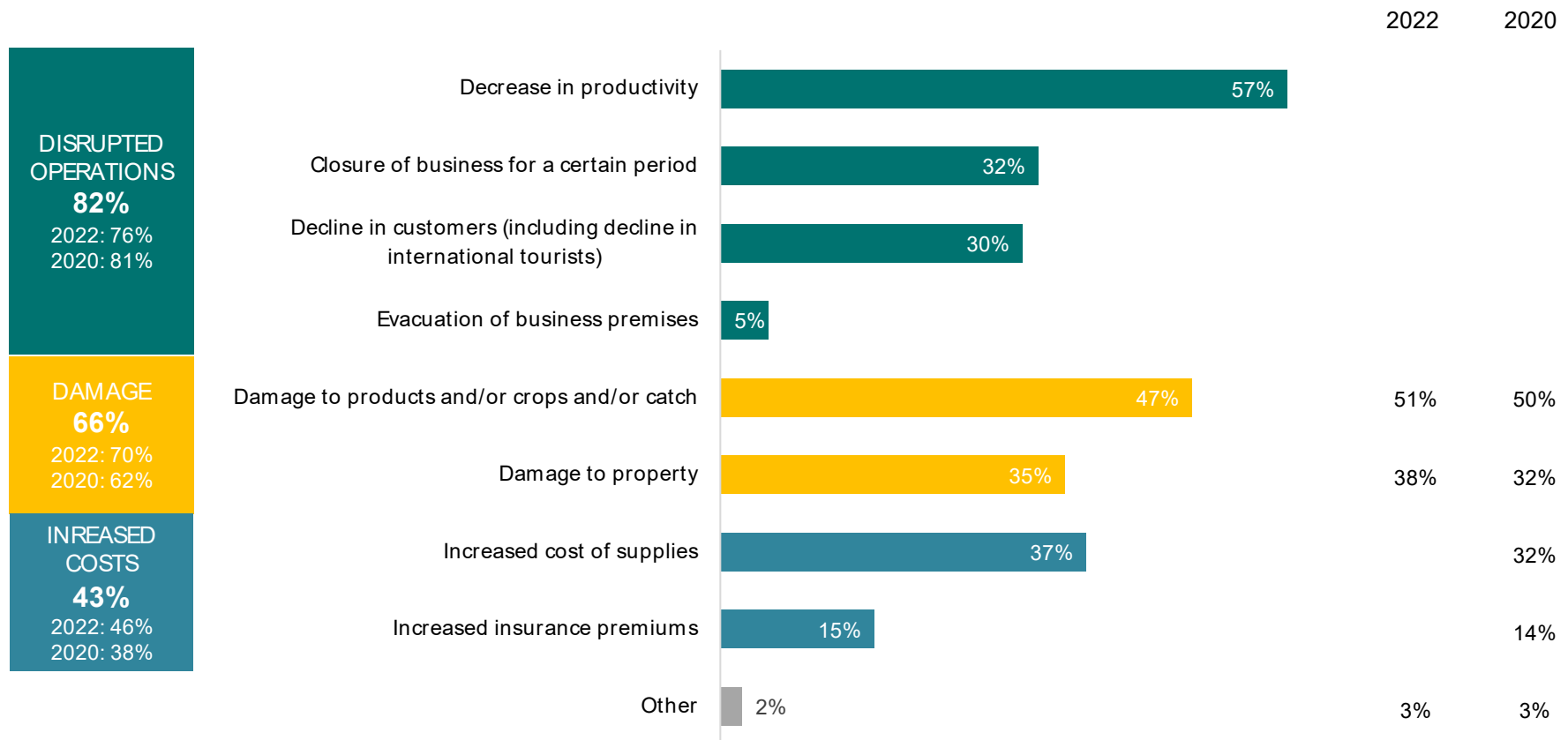
2022: 72%



Impact of Extreme Weather Patterns

More than 4-in-5 businesses have suffered disrupted operations due to extreme weather events, with this commonly resulting in decrease of productivity.

HAVE ANY OF THE FOLLOWING EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS OVER THE PAST 12 MONTHS?

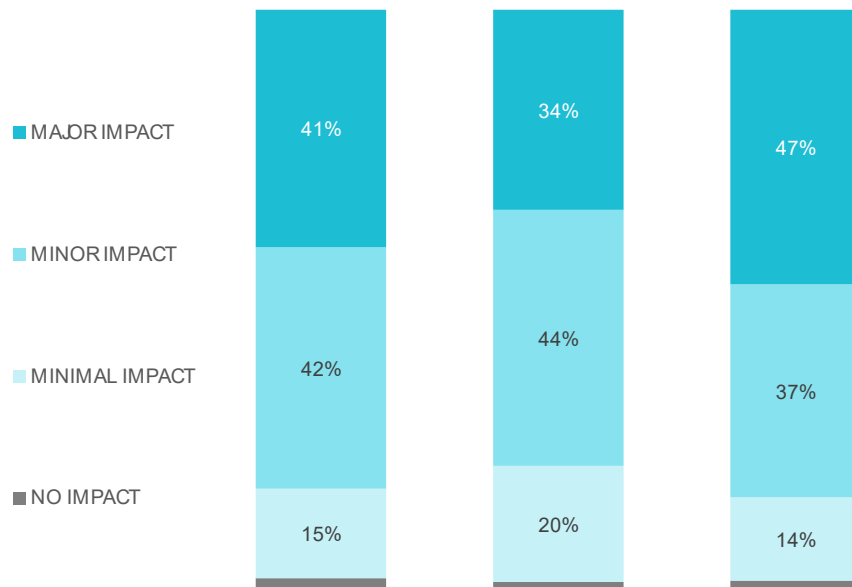


Impact of Extreme Weather Patterns

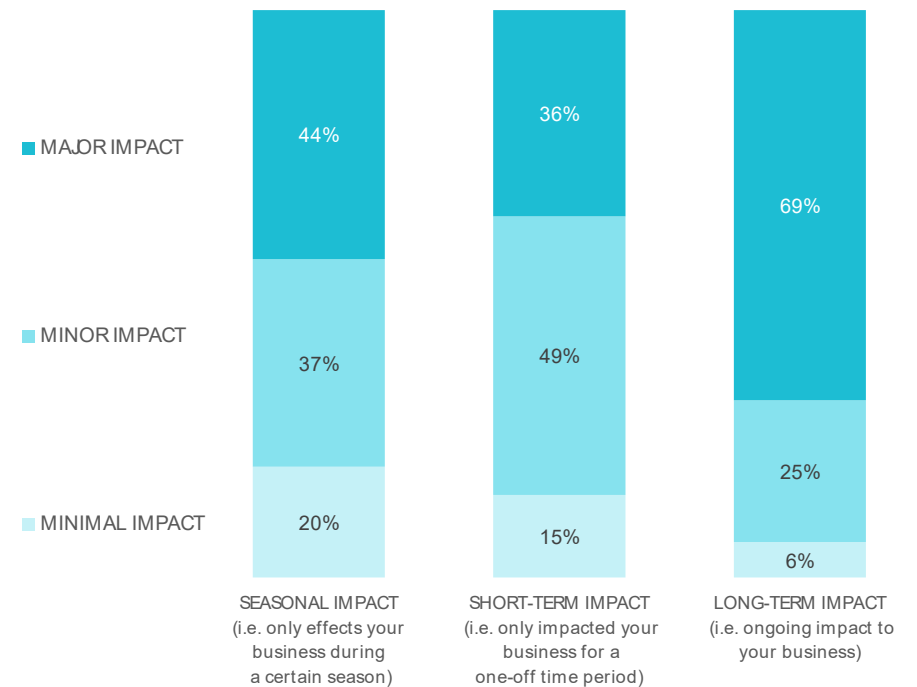
Nearly half of businesses suffered a major impact due to extreme weather, a significant increase from

2022. Unsurprisingly, long-term impacts are more likely to have major impacts.

TO WHAT EXTENT HAS YOUR BUSINESS BEEN IMPACTED BY THESE WEATHER PATTERNS?



AND WHAT WAS THE TIMEFRAME OF THIS IMPACT?

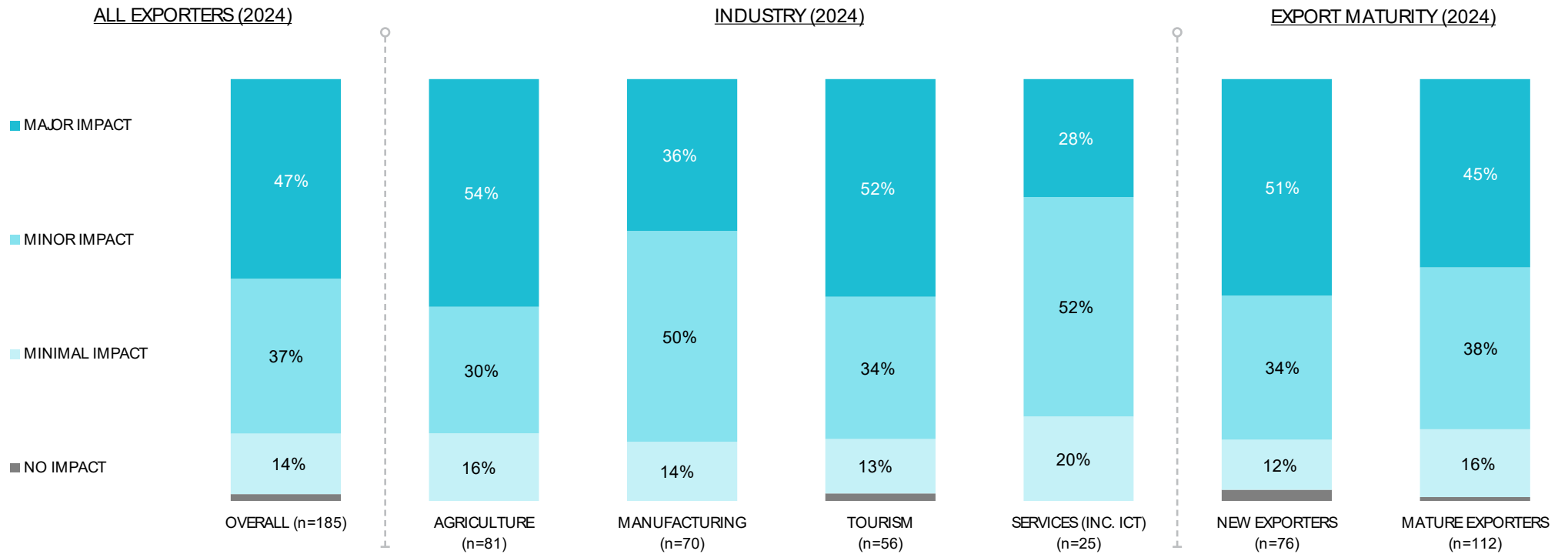


Impact of Extreme Weather Patterns

BY INDUSTRY AND MATURITY

Agriculture and tourism businesses are more likely to report major impacts due to extreme weather patterns.

TO WHAT EXTENT HAS YOUR BUSINESS BEEN IMPACTED BY THESE WEATHER PATTERNS?



Impact of Extreme Weather Patterns

BY INDUSTRY AND MATURITY

The tourism sector has particularly been impacted by extreme weather patterns, resulting in businesses

HOW HAVE THESE EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS?

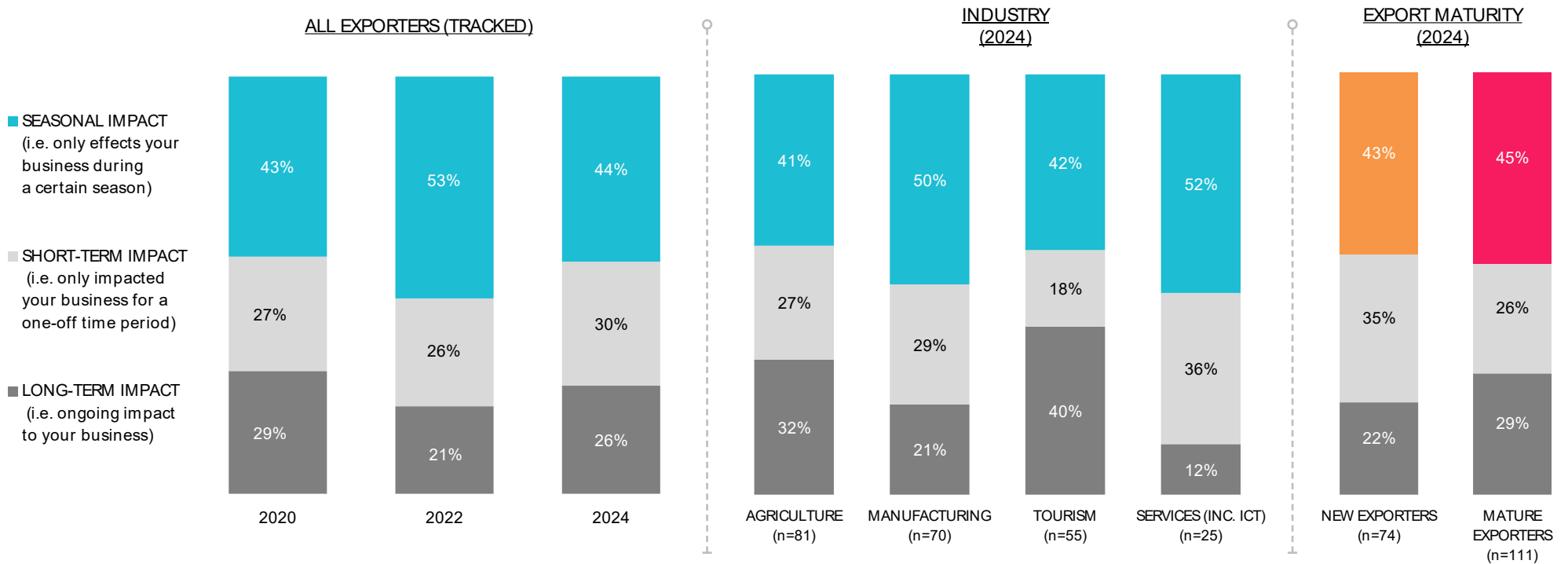
INITIATIVE	OVERALL	EXPORT AREA				EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
<i>Base n=</i>	<i>n=188</i>	<i>n=81</i>	<i>n=70</i>	<i>n=56</i>	<i>n=25</i>	<i>n=76</i>	<i>n=112</i>
Decrease in productivity	57%	63%	60%	52%	60%	55%	58%
Damage to products and/or crops and/or catch	47%	77%	49%	25%	24%	53%	43%
Increased cost of supplies	37%	48%	34%	34%	36%	37%	36%
Damage to property	35%	26%	20%	55%	28%	27%	40%
Closure of business for a certain period	32%	20%	27%	48%	40%	35%	30%
Decline in customers (inc. decline in international tourists)	30%	15%	21%	68%	28%	21%	36%
Increased insurance premiums	15%	7%	7%	29%	20%	9%	19%
Evacuation of business premises	5%	1%	3%	9%	8%	7%	4%
NET DISRUPTED BUSINESS OPERATIONS	82%	72%	80%	91%	92%	80%	83%
NET DAMAGE	66%	79%	59%	64%	40%	68%	65%
NET INCREASED COSTS	43%	49%	37%	46%	40%	41%	44%

Impact of Extreme Weather Patterns

BY INDUSTRY AND MATURITY

The impact of extreme weather patterns is seasonal for most businesses, with the tourism sector more likely to be impacted in the long-term.

HOW HAVE THESE EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS?





Tahiti, French Polynesia

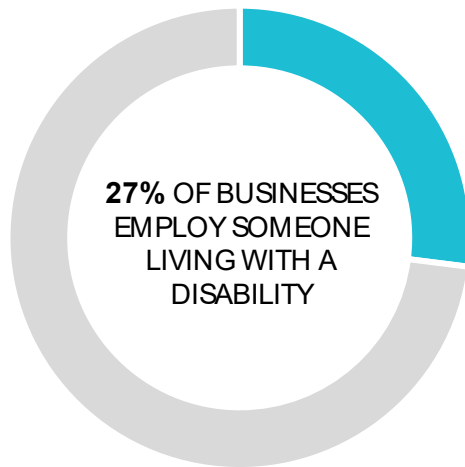
GENDER EQUALITY, DISABILITY AND SOCIAL INCLUSION

Disability Employment

More than a quarter of businesses employ at least one person living with a disability. This increases within

agriculture and tourism businesses, female-led businesses and larger businesses.

IS ANYONE CURRENTLY EMPLOYED BY YOUR BUSINESS LIVING WITH A DISABILITY?

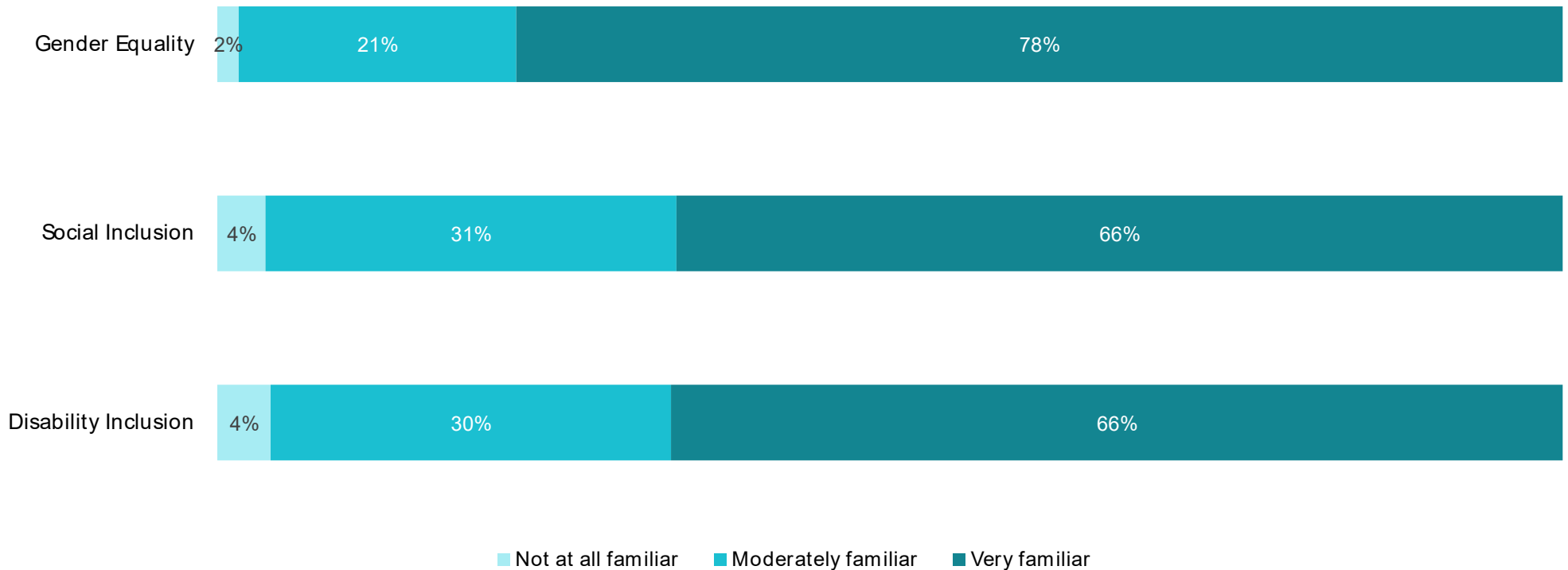


OVERALL	INDUSTRY				LEADERSHIP		BUSINESS SIZE		
	AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)	MALE-LED	FEMALE-LED	1-4 EMPLOYEES	5-20 EMPLOYEES	MORE THAN 20 EMPLOYEES
<i>n</i> =252	<i>n</i> =101	<i>n</i> =100	<i>n</i> =69	<i>n</i> =35	<i>n</i> =178	<i>n</i> =74	<i>n</i> =78	<i>n</i> =105	<i>n</i> =69
27%	35%	24%	35%	14%	23%	38%	14%	30%	38%

Familiarity with GEDSI Concepts

Nearly all businesses have a level of familiarity with gender equality, social and disability inclusion, with gender equality is the most familiar concept of the three.

HOW FAMILIAR ARE YOU WITH THE CONCEPTS OF...?



Familiarity with GEDSI Concepts

BY BUSINESS SIZE AND LEADERSHIP

There is a higher level of familiarity of gender equality concepts among businesses that are larger and female-led. While concepts are social and

disability inclusion are consistent among both male-led and female-led businesses.

HOW FAMILIAR ARE YOU WITH THE CONCEPTS OF...?

(% Very familiar)

INITIATIVE	OVERALL	BUSINESS SIZE			LEADERSHIP		EMPLOY SOMEONE WITH A DISABILITY?	
		1-4 EMPLOYEES	5-20 EMPLOYEES	MORE THAN 20 EMPLOYEES	MALE-LED	FEMALE-LED	YES	NO
<i>Base n=</i>	<i>n=252</i>	<i>n=78</i>	<i>n=105</i>	<i>n=69</i>	<i>n=178</i>	<i>n=74</i>	<i>n=69</i>	<i>n=166</i>
Gender equality	78%	67%	85%	80%	76%	82%	81%	77%
Social inclusion	66%	58%	72%	65%	66%	66%	65%	67%
Disability inclusion	66%	62%	72%	62%	66%	68%	67%	66%

Familiarity with GEDSI Concepts

BY INDUSTRY

Familiarity with GEDSI concepts are fairly consistent across all industries, with manufacturing being the most unfamiliar and services being the most familiar.

HOW FAMILIAR ARE YOU WITH THE CONCEPTS OF...?

(% Very familiar)

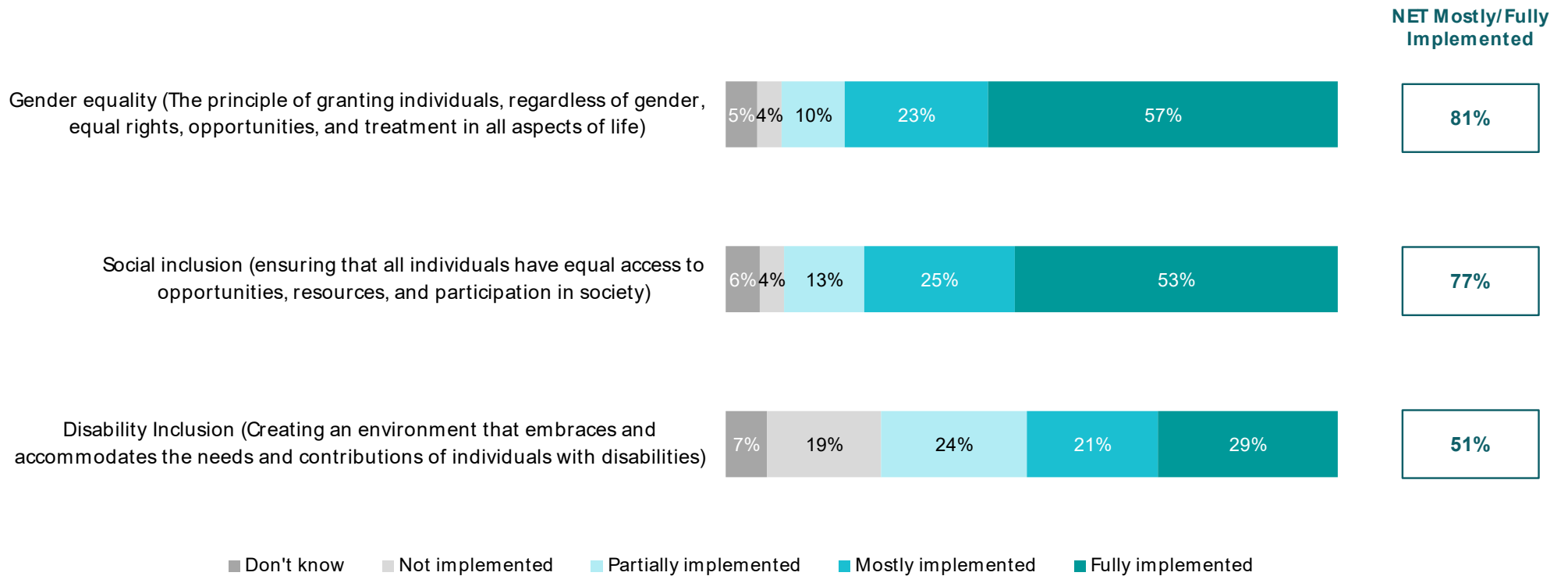
INITIATIVE	OVERALL	EXPORT AREA			
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)
<i>Base n=</i>	<i>n=252</i>	<i>n=101</i>	<i>n=100</i>	<i>n=69</i>	<i>n=35</i>
Gender equality	78%	81%	76%	81%	83%
Social inclusion	66%	70%	63%	67%	74%
Disability inclusion	66%	69%	64%	71%	74%

Implementation of GEDSI Policies and Practises

Approximately 4-in-5 businesses have either mostly or fully implemented gender equality and social inclusion

policies and practices. However, this decreases to half of businesses for disability inclusion.

TO WHAT EXTENT HAVE POLICIES AND PRACTICES BEEN IMPLEMENTED THAT ACTIVELY PROMOTE AND SUPPORT...?



Implementation of GEDSI Policies and Practises

BY BUSINESS SIZE AND LEADERSHIP

Female-led businesses and businesses employing individuals with a disability are much more likely to have implemented GEDSI policies and practices.

TO WHAT EXTENT HAVE POLICIES AND PRACTICES BEEN IMPLEMENTED THAT ACTIVELY PROMOTE AND SUPPORT...?

(% Mostly/Fully Implemented)

INITIATIVE	OVERALL	BUSINESS SIZE			LEADERSHIP		EMPLOY SOMEONE WITH A DISABILITY?	
		1-4 EMPLOYEES	5-20 EMPLOYEES	MORE THAN 20 EMPLOYEES	MALE-LED	FEMALE-LED	YES	NO
<i>Base n=</i>	<i>n=252</i>	<i>n=78</i>	<i>n=105</i>	<i>n=69</i>	<i>n=178</i>	<i>n=74</i>	<i>n=69</i>	<i>n=166</i>
Gender equality	81%	69%	85%	87%	77%	89%	91%	77%
Social inclusion	77%	68%	82%	81%	74%	86%	87%	75%
Disability inclusion	51%	45%	54%	52%	48%	58%	65%	46%

Implementation of GEDSI Policies and Practises

BY INDUSTRY

The extent to which GEDSI policies and practices have been implemented is fairly consistent across all industry sectors.

TO WHAT EXTENT HAVE POLICIES AND PRACTICES BEEN IMPLEMENTED THAT ACTIVELY PROMOTE AND SUPPORT...?

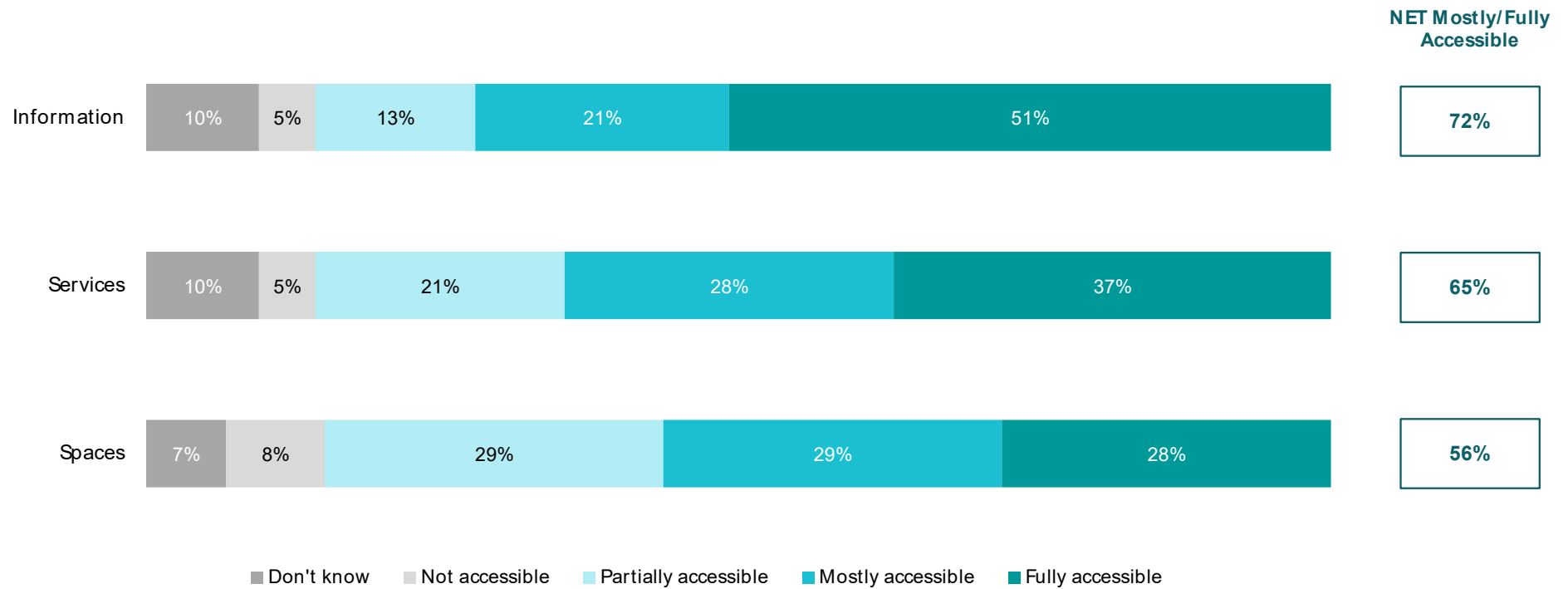
(% Mostly/Fully Implemented)

INITIATIVE	OVERALL	EXPORT AREA			
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)
<i>Base n=</i>	<i>n=252</i>	<i>n=101</i>	<i>n=100</i>	<i>n=69</i>	<i>n=35</i>
Gender equality	81%	86%	84%	81%	86%
Social inclusion	77%	79%	83%	80%	77%
Disability inclusion	51%	55%	53%	55%	54%

Accessibility for Individuals with Disabilities

Seven-in-ten businesses cite that people with disabilities in their business have access to information.

TO WHAT EXTENT DO YOU BELIEVE THE FOLLOWING ARE ACCESSIBLE TO INDIVIDUALS WITH DISABILITIES IN YOUR BUSINESS?



Accessibility for Individuals with Disabilities

BY BUSINESS SIZE AND LEADERSHIP

Accessibility of information, services, and spaces for individuals with disabilities, is higher among female-

led businesses and businesses employing individuals living with a disability.

TO WHAT EXTENT DO YOU BELIEVE THE FOLLOWING ARE ACCESSIBLE TO INDIVIDUALS WITH DISABILITIES IN YOUR BUSINESS?

(% NET Mostly/Fully Accessible)

INITIATIVE	OVERALL	BUSINESS SIZE			LEADERSHIP		EMPLOY SOMEONE WITH A DISABILITY?	
		1-4 EMPLOYEES	5-20 EMPLOYEES	MORE THAN 20 EMPLOYEES	MALE-LED	FEMALE-LED	YES	NO
<i>Base n=</i>	<i>n=252</i>	<i>n=78</i>	<i>n=105</i>	<i>n=69</i>	<i>n=178</i>	<i>n=74</i>	<i>n=69</i>	<i>n=166</i>
Information	72%	71%	70%	77%	71%	74%	84%	70%
Services	65%	67%	64%	64%	62%	72%	74%	63%
Spaces	56%	53%	62%	52%	56%	57%	64%	55%

Accessibility for Individuals with Disabilities

BY INDUSTRY

The extent to which businesses offer accessibility of information, services, and spaces for individuals is fairly

consistent across all industry sectors, with manufacturing being the most accessible.

TO WHAT EXTENT DO YOU BELIEVE THE FOLLOWING ARE ACCESSIBLE TO INDIVIDUALS WITH DISABILITIES IN YOUR BUSINESS?

(% NET Mostly/Fully Accessible)

INITIATIVE	OVERALL	EXPORT AREA			
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)
<i>Base n=</i>	<i>n=252</i>	<i>n=101</i>	<i>n=100</i>	<i>n=69</i>	<i>n=35</i>
Information	72%	73%	78%	72%	74%
Services	65%	65%	72%	61%	69%
Spaces	56%	55%	62%	49%	57%



Tropical Pine Forest, New Caledonia

Research Methodology

WHO RESPONDED

A total of 252 surveys were completed.

All respondents are key influencers or decision-makers in their business.

All businesses are based in the Pacific Islands and generate revenue through the export of goods or services to clients in other countries.

HOW

Respondents completed a 15-minute quantitative online survey.

WHEN

Online responses were collected 14 February–4 April 2024 by Fifth Quadrant.

About Pacific Trade Invest

As the Pacific's leading trade and investment promotion agency, Pacific Trade Invest (PTI) works to improve the livelihoods of Pacific people by enabling decent work and economic growth in the Blue Pacific.

We develop and promote businesses from the Pacific region through trade, investment and tourism facilitation. PTI is an agency of Pacific Islands Forum Secretariat is funded through the support of our host Governments, the Government of Australia, the Government of New Zealand, and the Government of the People's Republic of China.

Acknowledgments & disclaimer

Acknowledgements

PTI and survey partners would like to thank the Pacific export companies that took part in the survey and our on-the-ground partners who shared the survey through their networks.

Disclaimer

The information presented in this report is based on information received by research company Fifth Quadrant from a survey administered :
14 February – 4 April 2024.

