



# PACIFIC ISLANDS EXPORT SURVEY 2022

## EXPORT DYNAMICS IN THE PACIFIC ISLANDS



# INTRODUCTION

# BACKGROUND

# CONTENTS

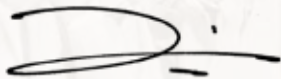
## INSIGHTS INTO PACIFIC EXPORTERS

The *Pacific Islands Export Survey* is a vital insight into the activities and the opinions of exporters in the Pacific Islands. Exporters are those who generate goods and services to sell to people from other countries, and in the Blue Pacific, our diverse network of exporters includes farmers, retailers/wholesalers, tourism operators and business professionals.

Pacific Trade Invest (PTI) Australia's *Pacific Islands Export Survey* provides a valuable snapshot of export dynamics in the Pacific, as well as a look at changes and trends in Pacific exports over the past eight years. This is the fifth biennial survey conducted by Fifth Quadrant with the support of the Australian Government and Pacific Islands Forum Secretariat.

In recognition of the growing digital economy, the 2022 survey seeks to capture more data on ecommerce uptake, and the barriers to exporting via online channels in the Pacific. Furthermore, with the acute and far-reaching impact of the COVID-19 pandemic across the region, this survey provides a lens to understand the effect COVID-19 had on Pacific exports.

It is a great honour to share with you the *Pacific Islands Export Survey 2022*.



CALEB JARVIS

Trade & Investment Commissioner  
Pacific Trade Invest Australia

The *Pacific Islands Exports Survey* 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.
- understand how extreme weather patterns have impacted businesses.
- understand the use of online channels in generating export revenue.
- identify key export target markets within the Pacific Islands and in other geographic areas.
- ascertain considerations of business sales and direct foreign investments.
- understand opportunities and pain points regarding exporting from the Pacific.
- determine the use and awareness of free trade and economic partnership agreements.

Foreword.....	3
Key insights .....	4
Sample profile.....	6
Export confidence .....	13
Impact of extreme weather conditions .....	21
Initiatives to increase export.....	28
Ecommerce .....	31
Export destinations .....	41
Barriers to exporting.....	47
Finance & investment .....	56
Free trade & economic agreements .....	62
Research methodology.....	66



# FOREWORD

## UNDERSTANDING THE IMPACT OF COVID-19 ON SMEs IN THE PACIFIC

The *PTI Pacific Islands Export Survey 2022* provides a wealth of information and insights into the economic temperature of our region. It comes at a pivotal moment as many countries of the Pacific shift from keeping COVID-19 out, to managing the impacts of living with it in their midst. It adds to a valuable longitudinal dataset that can inform nuanced and sophisticated analysis and policy formulation.

Pacific exporters are a microcosm of how the region as a whole has fared in the last two years. Once again, we see that that participation in the survey across the various export activities has shifted, with responses from those in the Tourism and Professional Services declining by 27 per cent overall in the 12-months preceding the survey. However, we also saw an increase in responses from the Manufacturing sector of 34 per cent. Of particular note is that this survey also saw PTI Australia expand survey questions to include data on ecommerce, further working to understand the growing impact this has had on exporters in the Pacific.

Our exporters have proven themselves to be resilient. We learn here of a range of methods that were used to adapt to the impact of COVID-19 on their businesses. There have been significant negative impacts on employment, with 38 per cent of businesses

having reduced staff numbers and 23 per cent having reduced wages. However, we have also seen 35 per cent of businesses diversify and 21 per cent report that they have either started, or increased, online sales.

COVID-19 has not been the only major challenge Pacific exporters have faced in the recent past. The number of businesses affected by extreme weather events has increased from 65 per cent in 2020 to 72 per cent in 2022. While the types of weather events have changed since the last survey, climate change impacts are an ever-present challenge for exporters, as they are for everyone in the region.

Despite some huge hits to orders and revenues in the last year or so, Pacific exporters report that business confidence has stabilised and the future holds promise. We see that 66 per cent of exporters anticipate an increase in revenue and orders over the next year. These confidence levels are highest in Agriculture (75 per cent), which may reflect the fact that this sector was least affected by the impacts of the pandemic. While the Tourism sector is more cautious, with 63 per cent of respondents saying they expect a positive turnaround within 12 months, it is evident that the gradual reopening of borders is being seen

as a sign that things are set to improve. It is particularly promising to see that 54 per cent of exporters anticipate taking on new staff in the coming year.

There is also appetite to explore new markets in the near future, with 69 per cent reporting that they are looking to new frontiers. The Middle East is proving appealing, while Asia is significantly down as compared with previous surveys in this regard. When it comes to barriers to exporting, it is not surprising to see that the major challenges are around transport costs and logistical challenges. Whilst we can expect these pressures to ease over the medium term, they will continue to be of major significance in the short term until International freight systems begin to normalise. In terms of what assistance would be of most benefit, there is an increased need for export grants as identified by 51 per cent of the respondents, up from 41 per cent in 2020.

The PTI export surveys are a key knowledge product that adds data that is rich and robust to our understanding of Pacific economic activity. It is a hugely valuable resource for Pacific policymakers, the private sector and development partners.

### **DR TESS NEWTON CAIN**

Adjunct Associate Professor  
Project Lead: Pacific Hub  
Griffith University



# KEY INSIGHTS

## **BUSINESS CONFIDENCE AMONG PACIFIC EXPORTERS HAS INCREASED DESPITE CHALLENGING ENVIRONMENTAL AND ECONOMIC CONDITIONS**

Despite over half of all businesses reporting a decline in export orders over the past 12 months, Pacific exporters are confident that export decline has peaked and the future holds promise, with 66 per cent of mature exporters and 69 per cent of new exporters anticipating an increase in revenue and export orders over the next year.

These confidence levels are highest in Agriculture, where 75 per cent of Pacific exporters expect orders to increase over the next 12 months. As one of the hardest hit industries, with 88 per cent reporting a decrease in overseas revenue over the last 12 months, the Tourism sector also expects a positive turnaround within the next 12 months.

In line with this rising confidence, it is also promising to see 54 per cent of Pacific exporters expect to hire new employees over the next 12 months, a significant increase on years prior.

## **JUST UNDER THREE QUARTERS OF PACIFIC EXPORTERS HAVE BEEN IMPACTED BY EXTREME WEATHER PATTERNS OVER THE PAST YEAR**

The number of businesses affected by extreme weather events has increased from 65 per cent in 2020 to 72 per cent in 2022. These weather patterns have disrupted operations for most exporters, with 53 per cent reporting decreasing in productivity, 51 per cent reporting damage to products, crops, catch or property, and 41 per cent reporting increased cost of supplies due to extreme weather.

While the types of weather events have changed since the last survey, 34 per cent of respondents report weather patterns have had a major impact on their business.

## **PACIFIC EXPORTERS HAVE INSTIGATED A WIDE RANGE OF INITIATIVES TO INCREASE EXPORT ORDERS**

Similar to 2020, exporters are driving growth through a range of initiatives, including improving process efficiency, development of new products and services, and enhanced online marketing.

Furthermore, exporters have taken actions to reduce the impact of COVID-19 on their businesses predominantly through the reduction of operational costs, reducing staff numbers and working hours.

Positively, this adaptation has also seen 35 per cent of businesses diversify their business, with 21 per cent also reporting a shift towards starting or increasing online sales.

## **EXPORTERS CONTINUE TO DEVELOP AND LEVERAGE ONLINE CHANNELS, EVEN AS EXPORT REVENUE DECLINES**

Three-quarters of Pacific exporters are now using online channels to generate export revenue, with the overall proportion of total revenue generated online also increasing to 52 per cent, up from 47 per cent in 2020. This increase is largely due to new exporters, who appear to be adopting ecommerce and online channels more readily than mature exporters.

Despite online sales representing a higher proportion of overall sales in 2022, the volume of online sales has declined in line with the overall loss of revenue over the past 12 months. This decreasing online export revenue is driven primarily by businesses in the Tourism industry, and to a lesser extent, Manufacturing.

Exporters acknowledge that there are a range of factors positively impacting their ecommerce activities, including increased use of online channels among customers, easier access to digital devices, and improved online payment solutions.

Of the exporters who do not currently use ecommerce or online channels to generate export revenue, over 30 per cent say it is because they lack the skills to do so. Interestingly, calls for ecommerce capacity-building opportunities, including digital marketing, social media, ecommerce platforms and online payments, come predominantly from those already generating revenue online.

# KEY INSIGHTS CONT...

## **EXPORTERS ARE INCREASING TRADE TO NEW REGIONS, BOTH GLOBALLY AND WITHIN THE PACIFIC ISLANDS.**

Over the next three years, over two-thirds of Pacific exporters are planning to broaden their reach into new markets. Among businesses targeting new markets, 28 per cent are looking to expand into Australia, 27 per cent into the USA and Canada, and 26 per cent into Asia. Compared to previous years, interest in entering the Asian market has dropped significantly, whereas interest in the Middle East has increased.

Manufacturing exporters are looking to expand the most, with increased orders predicted to predominantly come from Australia, the Pacific and New Zealand.

## **COST OF EXPORT AND LOGISTICS REMAIN KEY CHALLENGES FOR PACIFIC EXPORTERS**

Cost of export and challenges with export logistics have increasingly become barriers to Pacific exporters selling their products and services to overseas customers or visitors. 52 per cent of exporters stating that cost of export, such as high fuel, energy and transport costs, are their main barrier, which increased from 46 per cent in 2020. Furthermore, challenges with export logistics have increased from 38 per cent citing it as a barrier in 2020, to 48 per cent in 2022.

For those in the tourism sector, the cost of export and logistics is a lesser concern, with respondents instead indicating that a lack of marketing capability to attract overseas customers and international competition are their main barriers to export. Across all industries, 47 per cent of new exporters highlight finding access to finance or capital as a major barrier to export, with only 23 per cent of mature exporters citing the same.

To counteract these barriers, exporters are calling for assistance through export grants, business marketing, more competitive transport costs and financial support to offset high freight costs, all of which have increased since 2020.

## **HALF OF ALL EXPORTERS ARE AWARE OF FREE TRADE AGREEMENTS (FTAs) AND ECONOMIC PARTNERSHIPS, WITH THEIR PERCEIVED BENEFIT HAVING IMPROVED**

Level of awareness of FTAs remains consistent with previous waves, with half of all Pacific exporters are aware of each agreement/partnership.

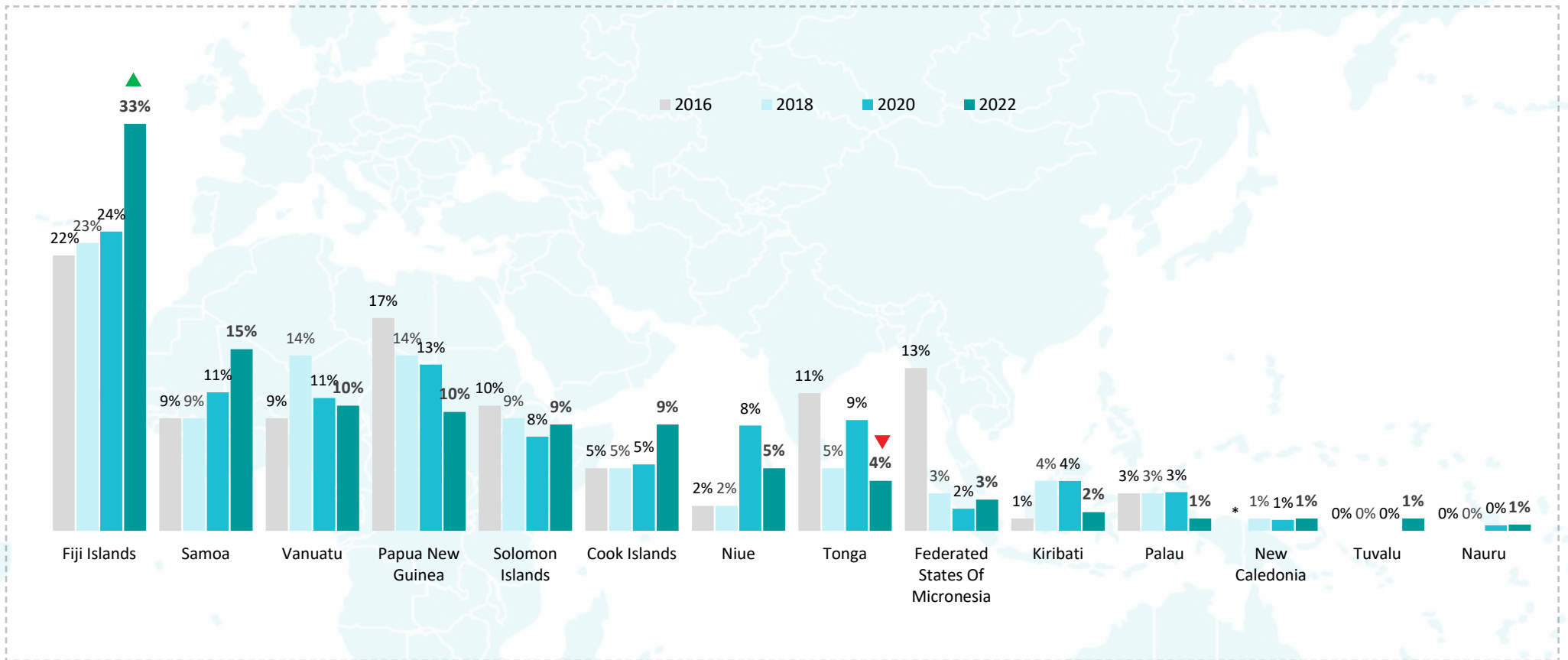
While awareness levels remain relatively steady, it is positive to see that the perceived benefits of these agreements have improved since 2020. This is the case more so for agriculture, manufacturing, and mature businesses.

# SAMPLE PROFILE



# LOCATION

Our 2022 sample includes exporter businesses across the Pacific Islands, with the distribution of respondents generally in line with previous waves. The exception is Fiji, where the response rate increased significantly.



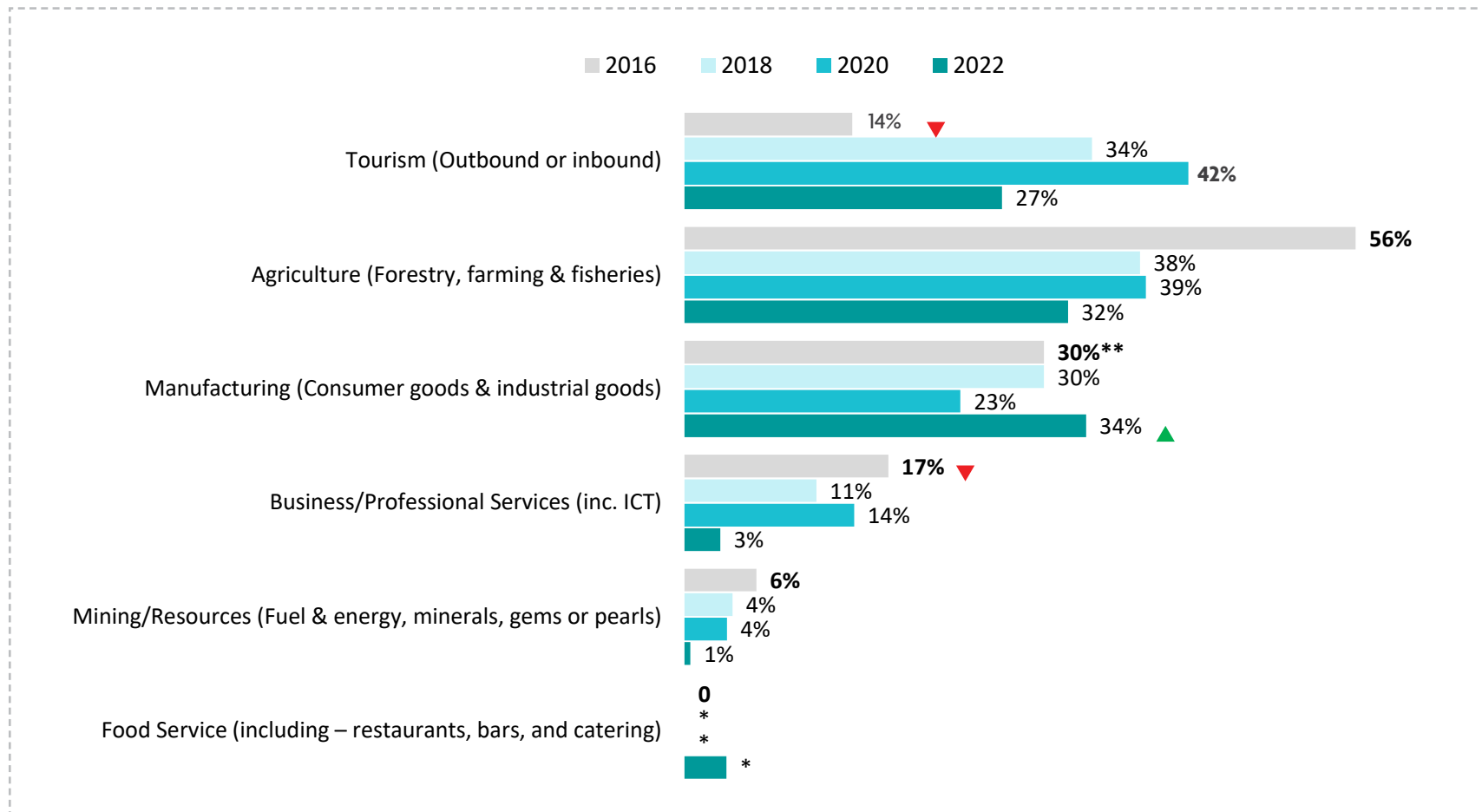
▲ ▼ Sig. higher/lower than 2020 (95% CI)

# MAIN EXPORT ACTIVITY

Participation in the survey across the various export activities has shifted, with a decline in Tourism and Business and Professional Services, and an increase in Manufacturing.

Q

WHAT IS THE MAIN EXPORT ACTIVITY OF YOUR ORGANISATION?



\* Question not included in previous surveys.

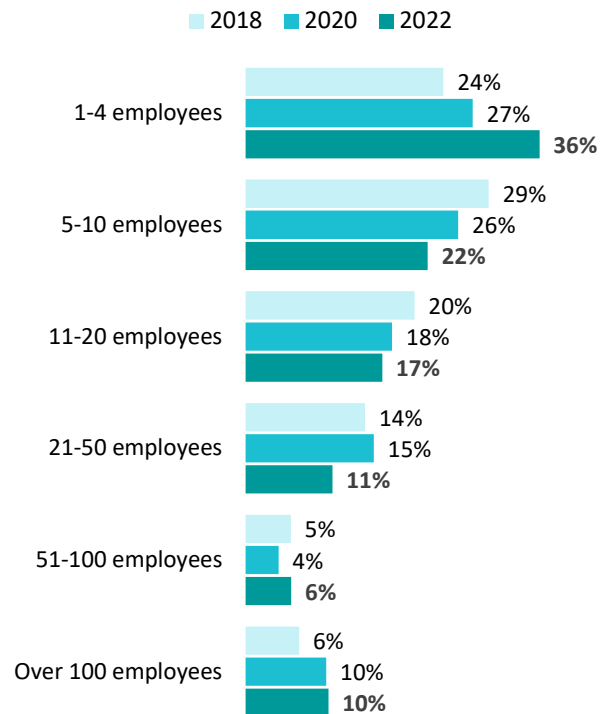
▲ ▼ Sig. higher/lower than 2020 (95% CI)



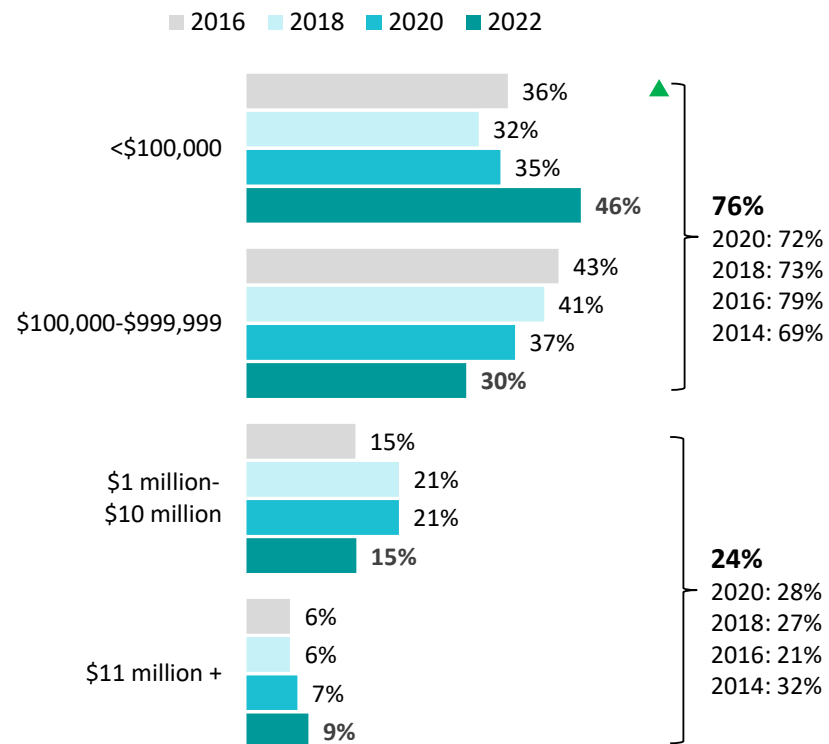
# BUSINESS PROFILE

The proportion of private companies, especially SMEs, with less than five employees and an annual revenue less than \$100k, has increased this wave.

## Q NUMBER OF EMPLOYEES

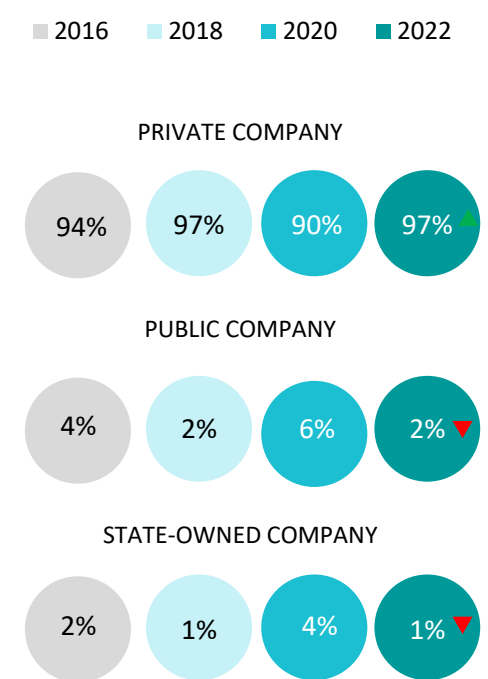


## Q ANNUAL REVENUE



Note: Due to changes in the questionnaire, code frame is not directly comparable to 2016 & 2014.

## Q OWNERSHIP STRUCTURE



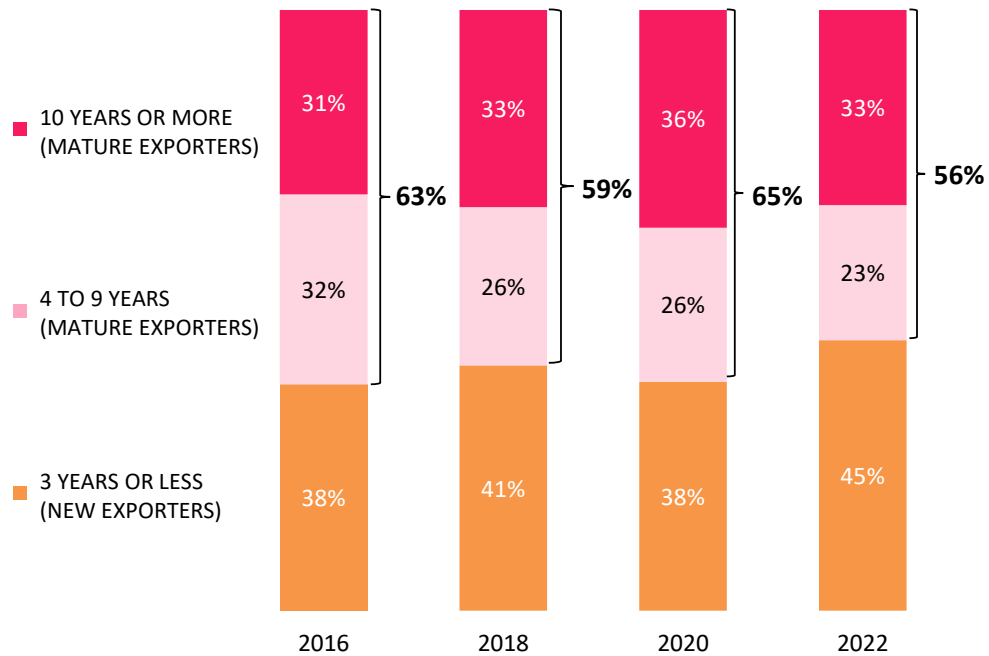
▲ ▼ Sig. higher/lower than 2020 (95% CI).

# NUMBER OF YEARS IN OPERATION

This survey saw the largest proportion of new exporters since tracking began.

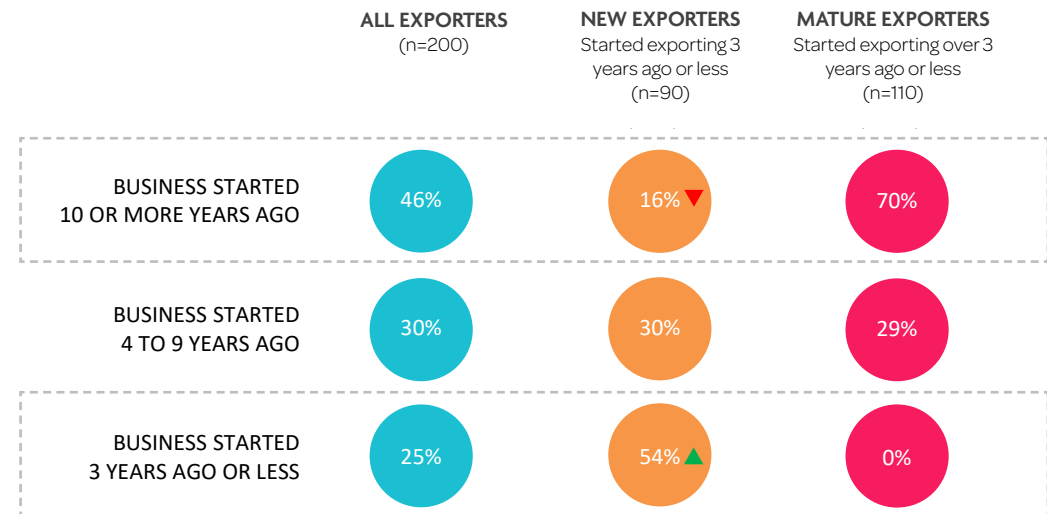
Q

HOW LONG HAVE YOU BEEN EXPORTING?



Q

WHEN DID YOUR BUSINESS START OPERATIONS?



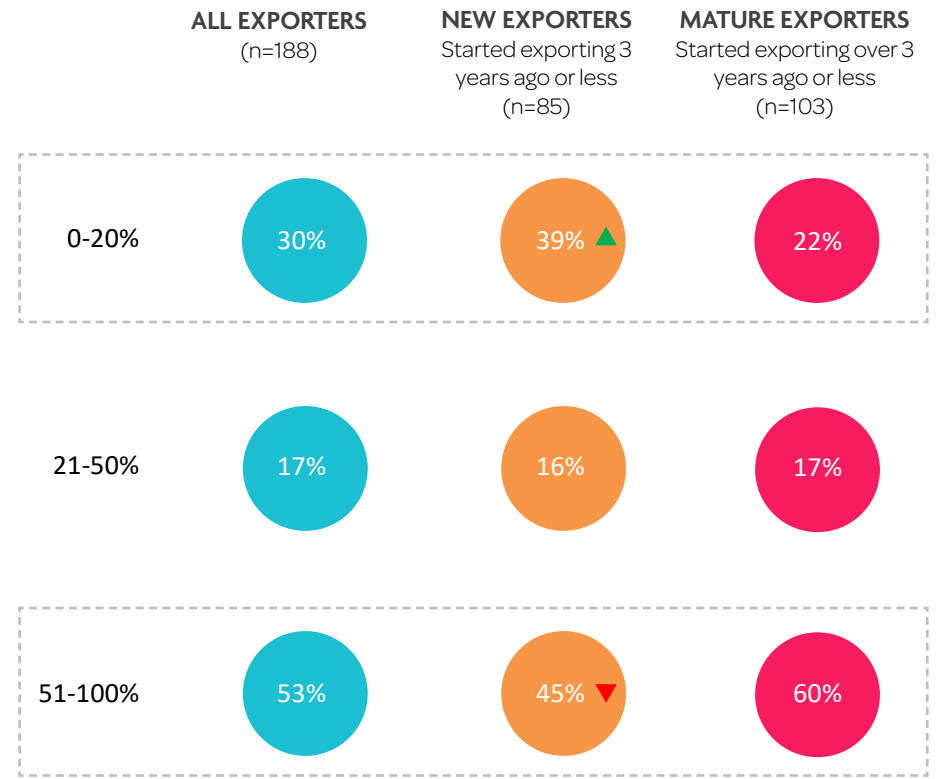
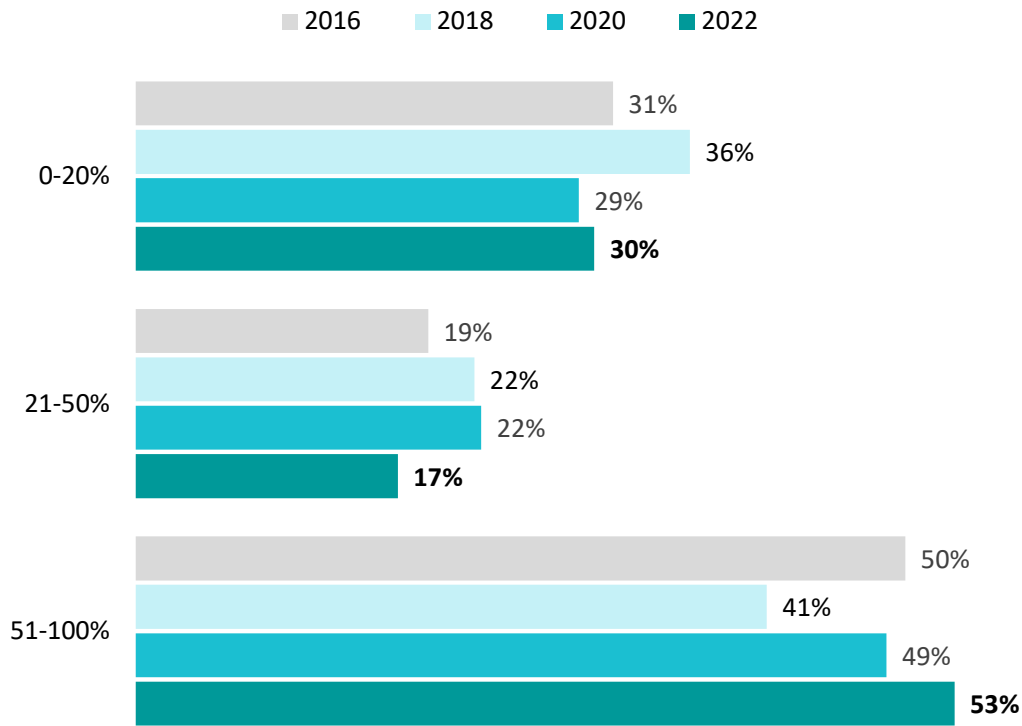
54% of new exporters are new businesses (vs 63% in 2020)

▲▼ New Sig. higher/lower than Mature (95% CI)

# PERCENTAGE OF REVENUE GENERATED FROM EXPORTING

Over half the respondents rely on exports for a majority of their revenue stream. This is more so with mature exporters than new exporters.

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

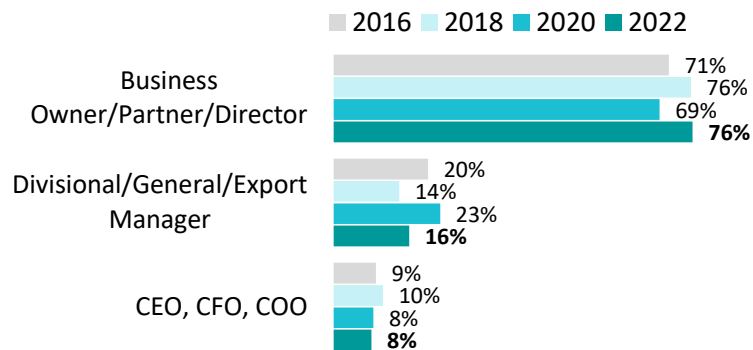


▲ ▼ New sig. higher/lower than Mature (95% CI)

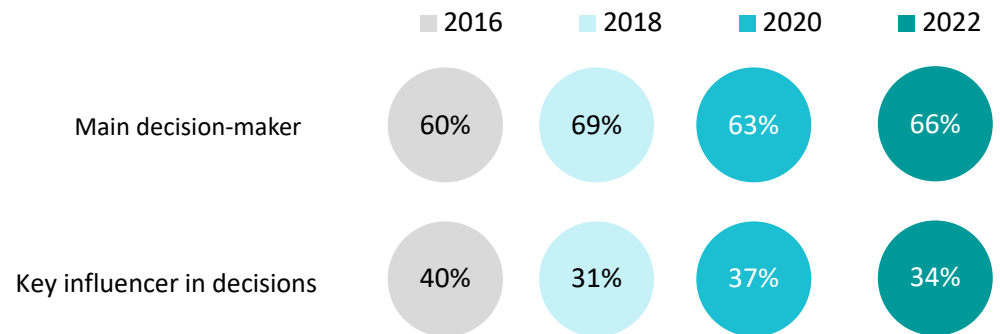
# RESPONDENT & EMPLOYEE PROFILE

Gender representation among total employees remains largely equal; however, at proprietor and executive level, representation is still mostly male. There have been incremental increases in female representation across all roles since 2016.

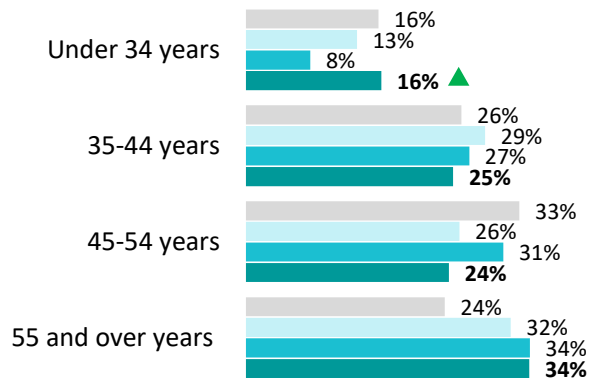
## Q JOB TITLE



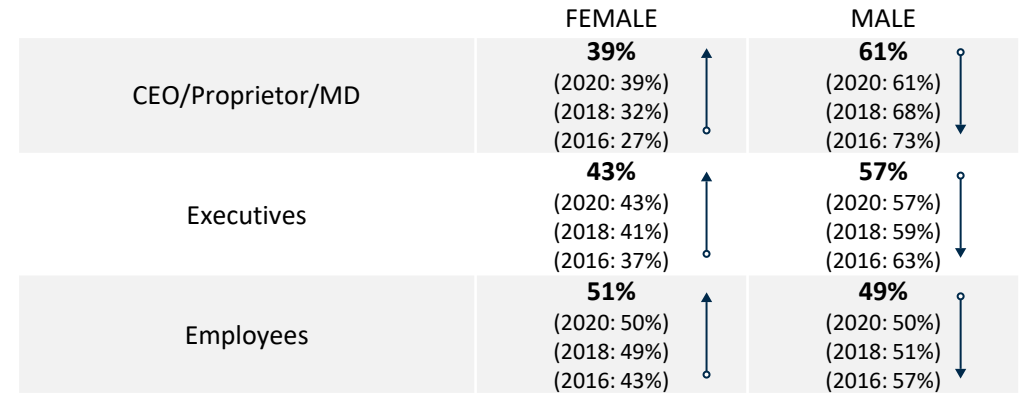
## Q LEVEL OF DECISION-MAKING



## Q AGE OF PROPRIETOR/CEO/MD



## Q GENDER OF EMPLOYEES



▲ ▼ Sig. higher/lower than 2020 (95% CI)



# EXPORT CONFIDENCE

# CHANGE IN EXPORT ORDERS OVER THE LAST 12 MONTHS

Over half of all Pacific exporters reported a decline in revenue over the last 12 months. Of this, only one quarter reported a growth in export orders over the past 12 months, which is significantly less than in early 2020.

Q

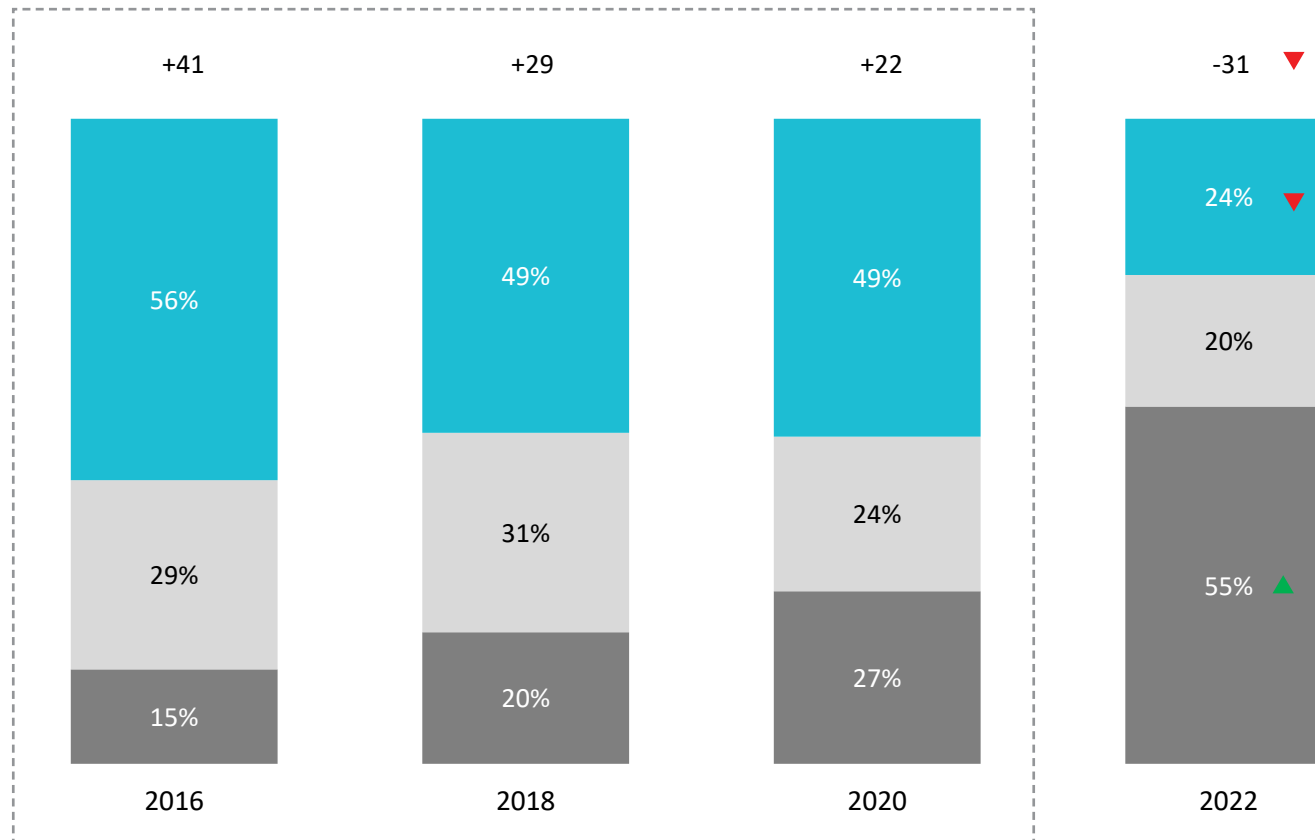
OVER THE LAST 12 MONTHS, HAS YOUR EXPORT REVENUE INCREASED, DECREASED, OR STAYED THE SAME?

NET INCREASE  
(% INCREASE - % DECREASE)

■ INCREASED

■ STAYED THE SAME

■ DECREASED



▲ ▼ Sig. higher/lower than 2020 (95% CI)

# EXPECTED CHANGE IN EXPORT ORDERS OVER THE NEXT 12 MONTHS

Businesses are optimistic about the next 12 months, with two out of three businesses expecting an increase in export orders.

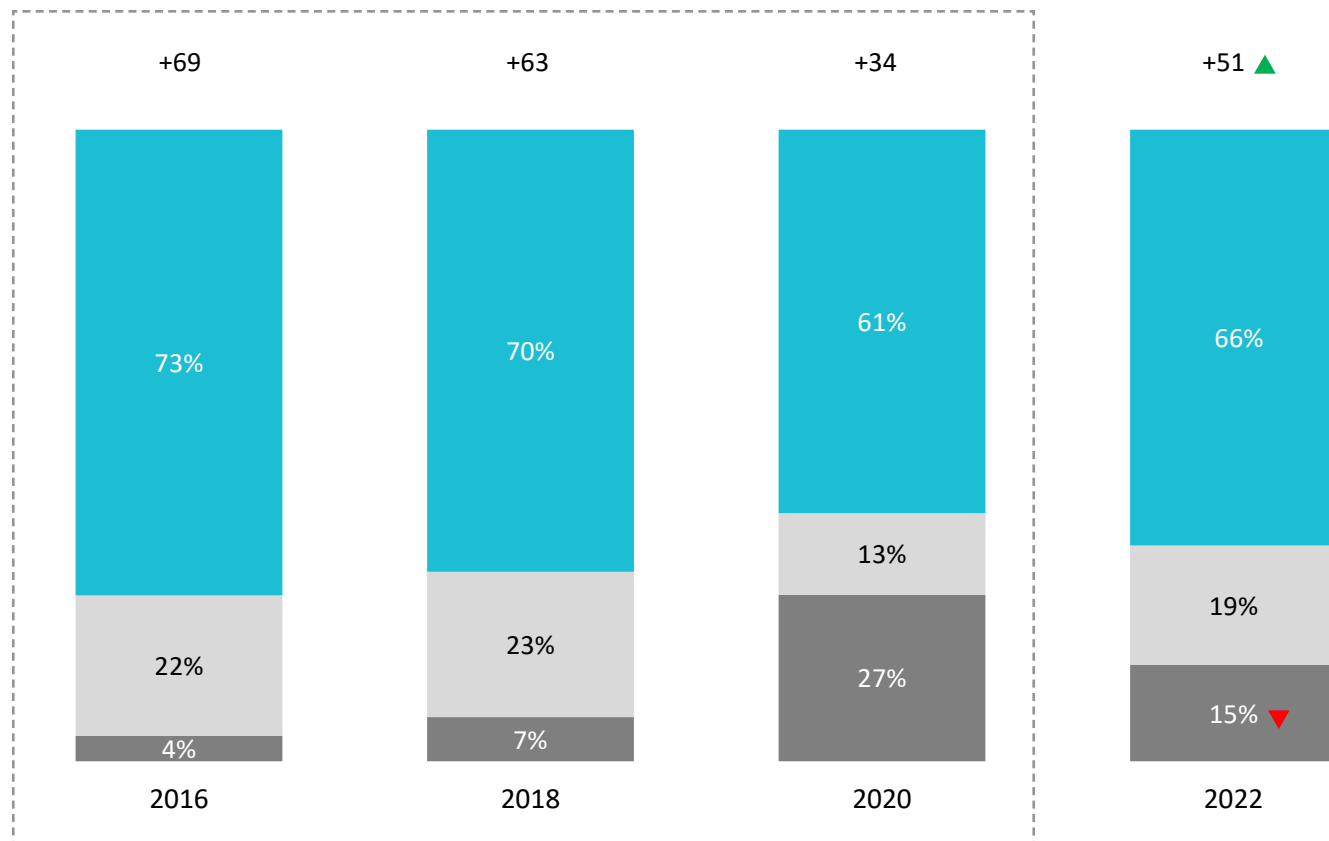
**Q** OVER THE NEXT 12 MONTHS, DO YOU EXPECT EXPORT REVENUE TO INCREASE, DECREASE OR STAY THE SAME?

NET INCREASE  
(% INCREASE - % DECREASE)

■ INCREASE

■ STAY THE SAME

■ DECREASE

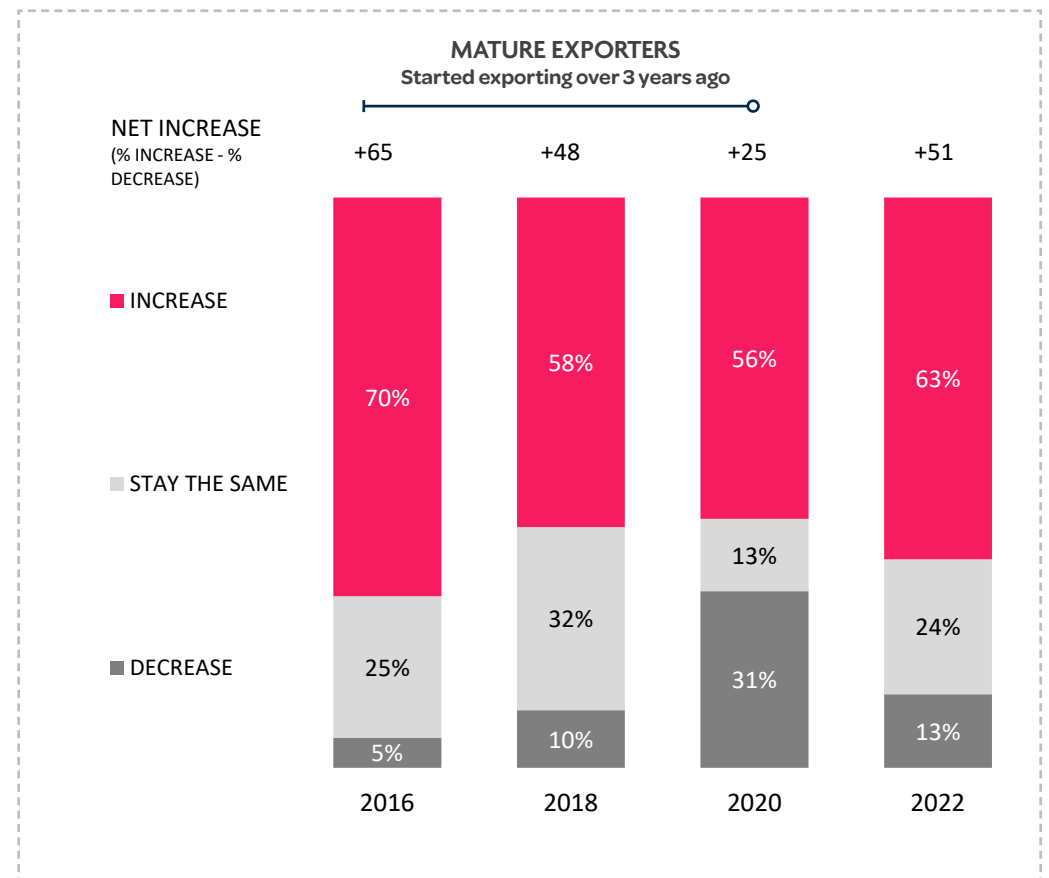
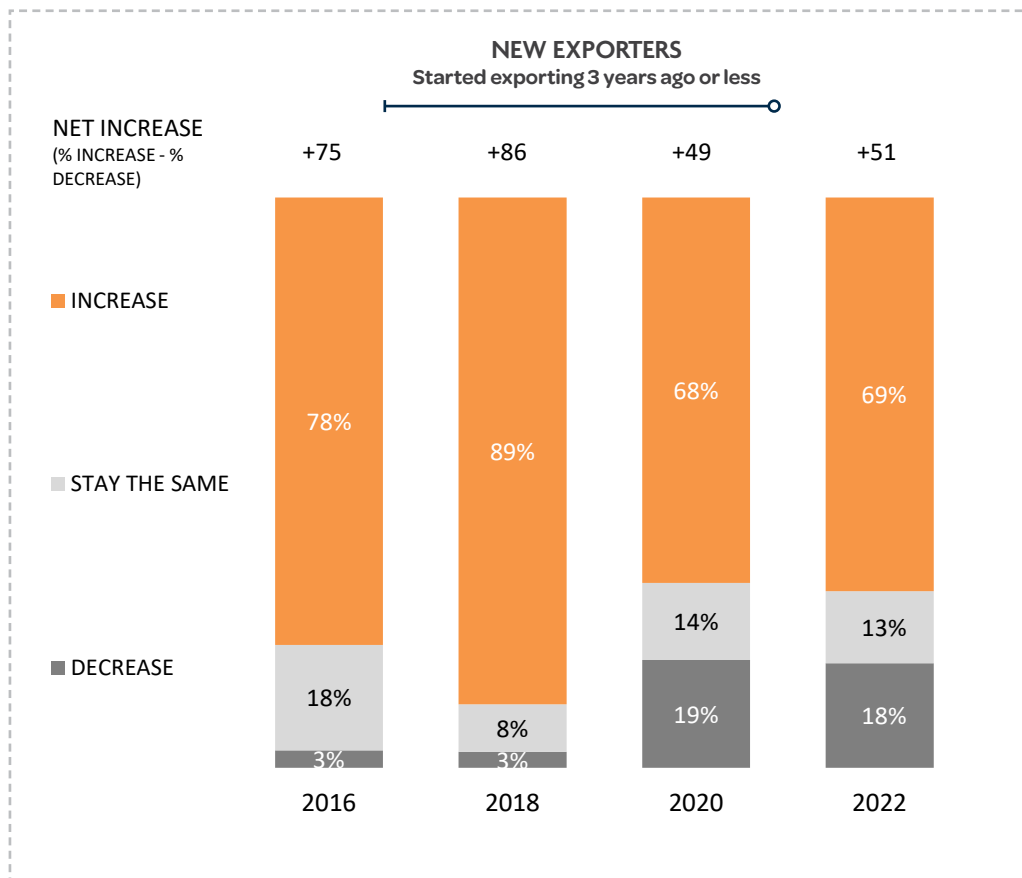


▲▼ Sig. higher/lower than 2020 (95% CI)

# EXPECTED CHANGE IN EXPORT ORDERS OVER THE NEXT 12 MONTHS - BY EXPORT MATURITY

Both new and mature exporters are confident of an increase in export orders over the next 12 months, with this figure having risen since 2020 in both groups.

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

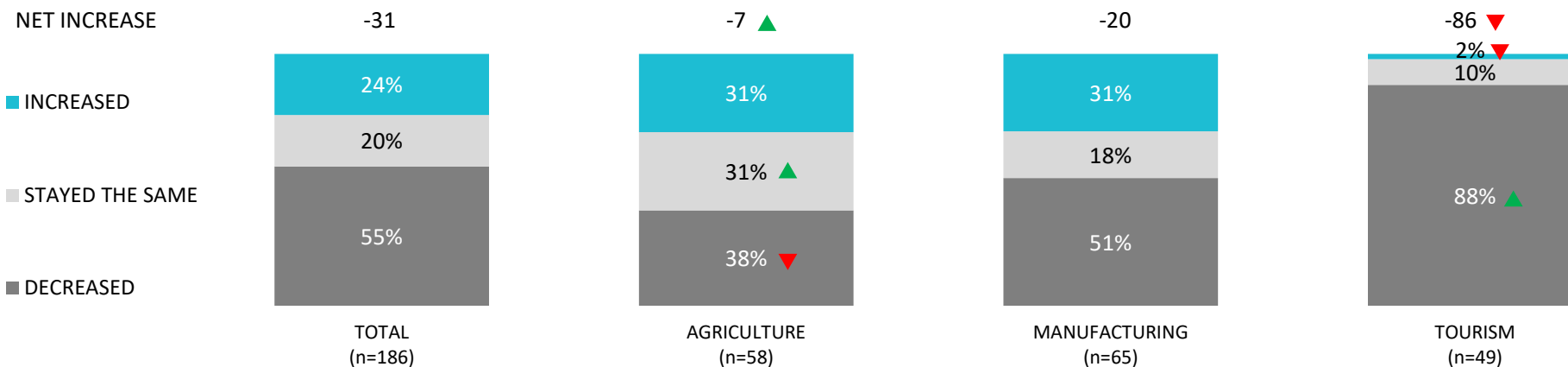




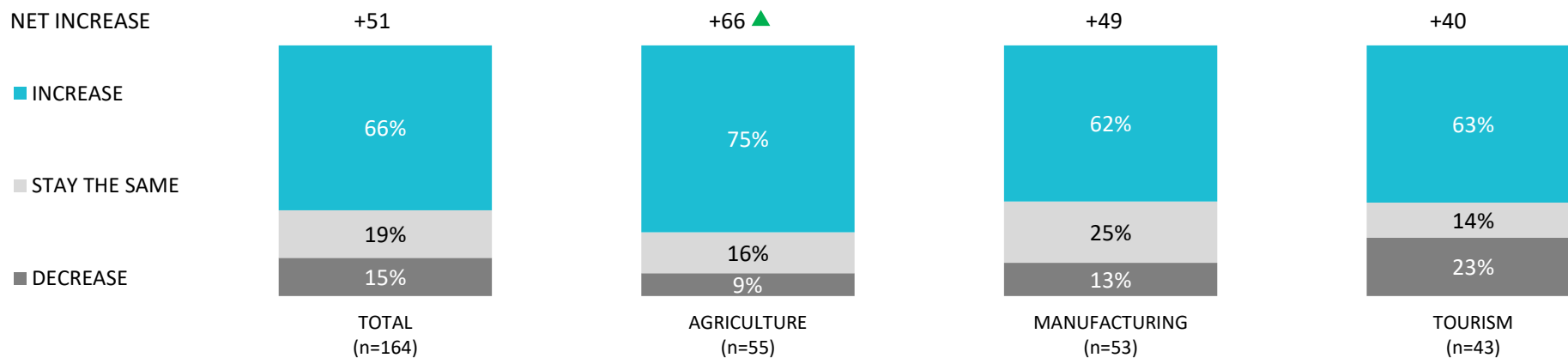
# CHANGE AND EXPECTATION IN EXPORT ORDERS – BY INDUSTRY

As the hardest hit industry over the last 12 months, Tourism businesses reported a significant decline in revenue. Despite this, more than half of all businesses remain optimistic about the next 12 months, with Agriculture proving to be the most confident and least affected industry.

LAST 12 MONTHS



NEXT 12 MONTHS



▲▼ Sig. higher/lower than total (95% CI)

# COVID-19 IMPACT ON EXPORT ORDERS – BY INDUSTRY

Even though a large proportion of respondents are optimistic about the future, businesses are realistic about the continued negative impact COVID-19 will have on their export orders in the next 12 months.

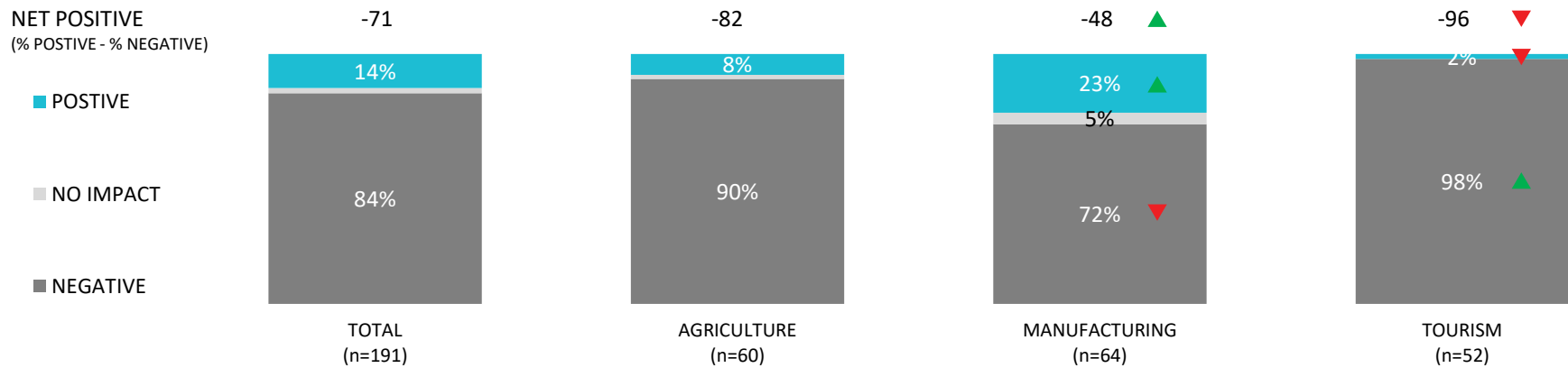
Q

WHAT IMPACT HAS THE COVID-19 PANDEMIC HAD ON YOUR EXPORT ORDERS OR REVENUE OVER THE PAST 12 MONTHS?

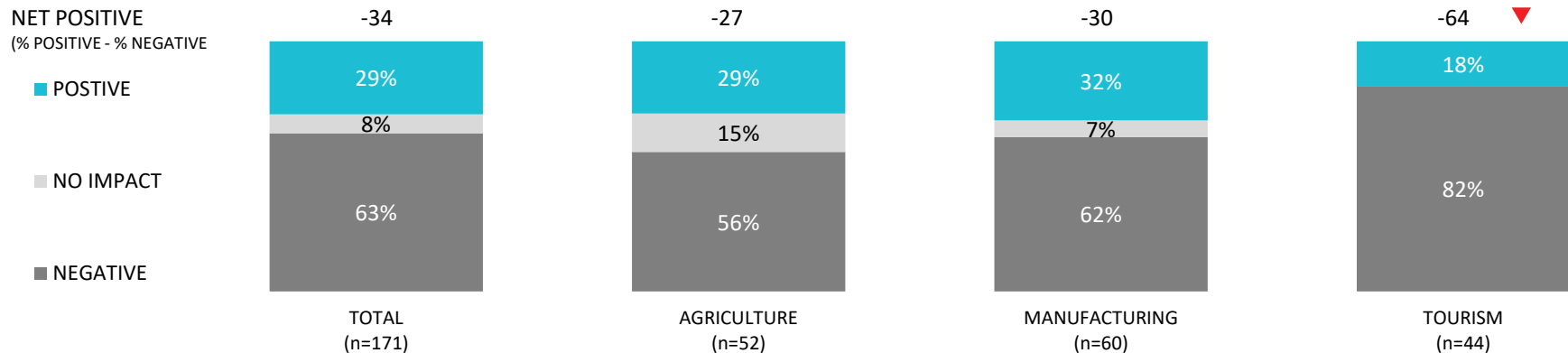
Q

WHAT IMPACT DO YOU EXPECT THE COVID-19 PANDEMIC WILL HAVE ON YOUR EXPORT ORDERS OR REVENUE OVER THE NEXT 12 MONTHS?

LAST 12 MONTHS



NEXT 12 MONTHS



▲ ▼ Sig. higher/lower than total (95% CI)

# BUSINESS ACTIONS TAKEN TO REDUCE COVID-19 IMPACT

To minimise the impact of COVID-19, almost two-thirds of respondents have reduced operational costs, working hours and staff numbers. Positively, a third of respondents have also diversified to help reduce the impact.



WHAT ACTIONS HAS YOUR BUSINESS TAKEN TO REDUCE THE COST AND DAMAGE TO YOUR BUSINESS DUE TO THE COVID-19 PANDEMIC?

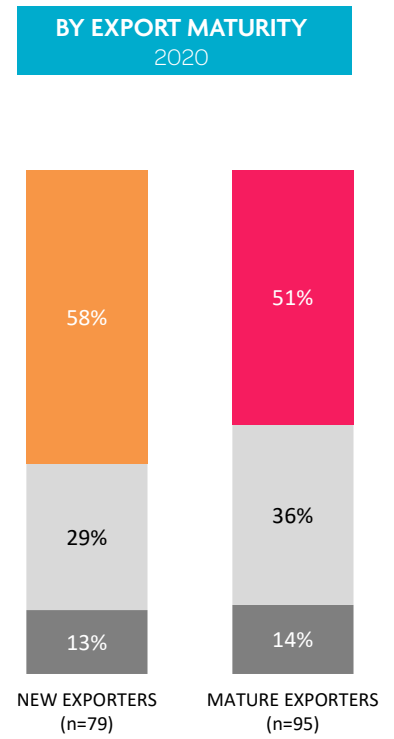
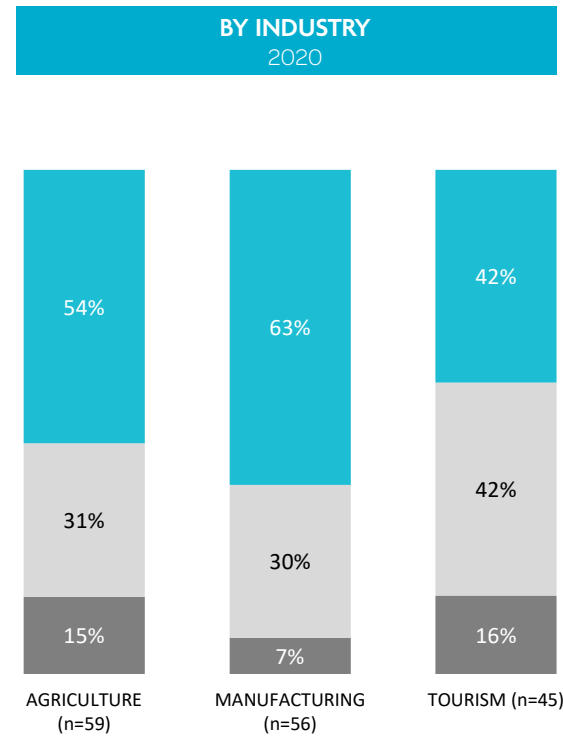
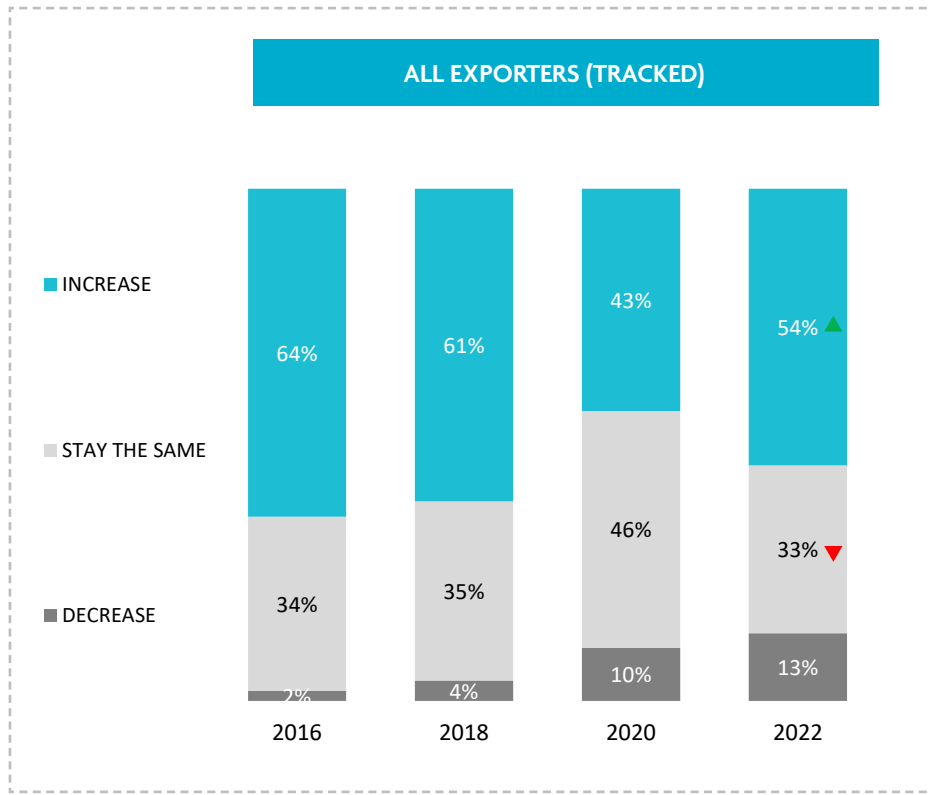
	2022	EXPORT AREA			EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
		n=64	n=67	n=53	n=90	n=110
Reduced other operational costs	63%	53%	66%	74%	58%	67%
Reduced working hours	48%	36%	49%	64%	43%	51%
Reduced staff numbers	38%	34%	27%	60% ▲	23% ▼	49%
Diversified your business	35%	34%	40%	34%	34%	35%
Temporarily closed operations	29%	27%	28%	40%	29%	29%
Reduced wages of staff	23%	19%	18%	36%	23%	22%
Spoken to the landlord about rent relief	21%	9%	22%	34%	19%	22%
Transitioned the business to sell/do more online	21%	23%	27%	13%	22%	19%
Permanently closed operations	4%	3%	1%	6%	6%	2%

▲▼ New sig. higher/lower than Mature (95% CI)

# 12-MONTH EMPLOYMENT PROJECTIONS

In line with rising business, there has been a significant increase in exporters who expect to hire new employees over the next 12 months.

**Q** DURING THE NEXT 12 MONTHS, DO YOU THINK YOUR NUMBER OF EMPLOYEES WILL INCREASE, DECREASE OR REMAIN THE SAME?



▲ ▼ Sig. higher/lower than 2020 (95% CI)



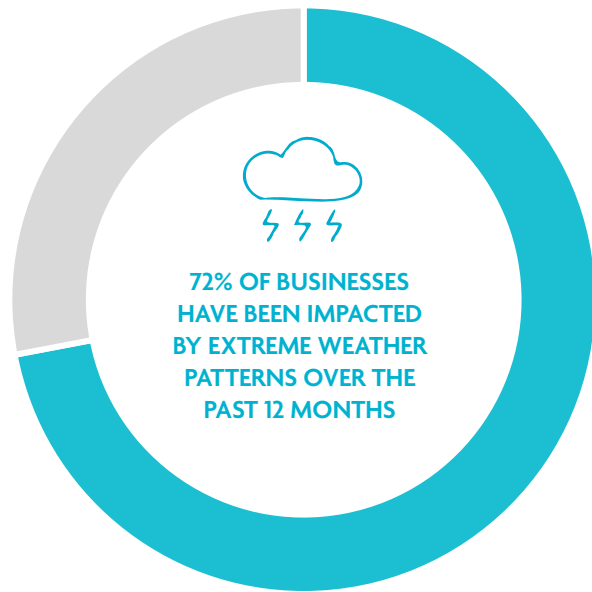
IMPACT OF  
**EXTREME**  
WEATHER CONDITIONS

# IMPACT OF EXTREME WEATHER PATTERNS

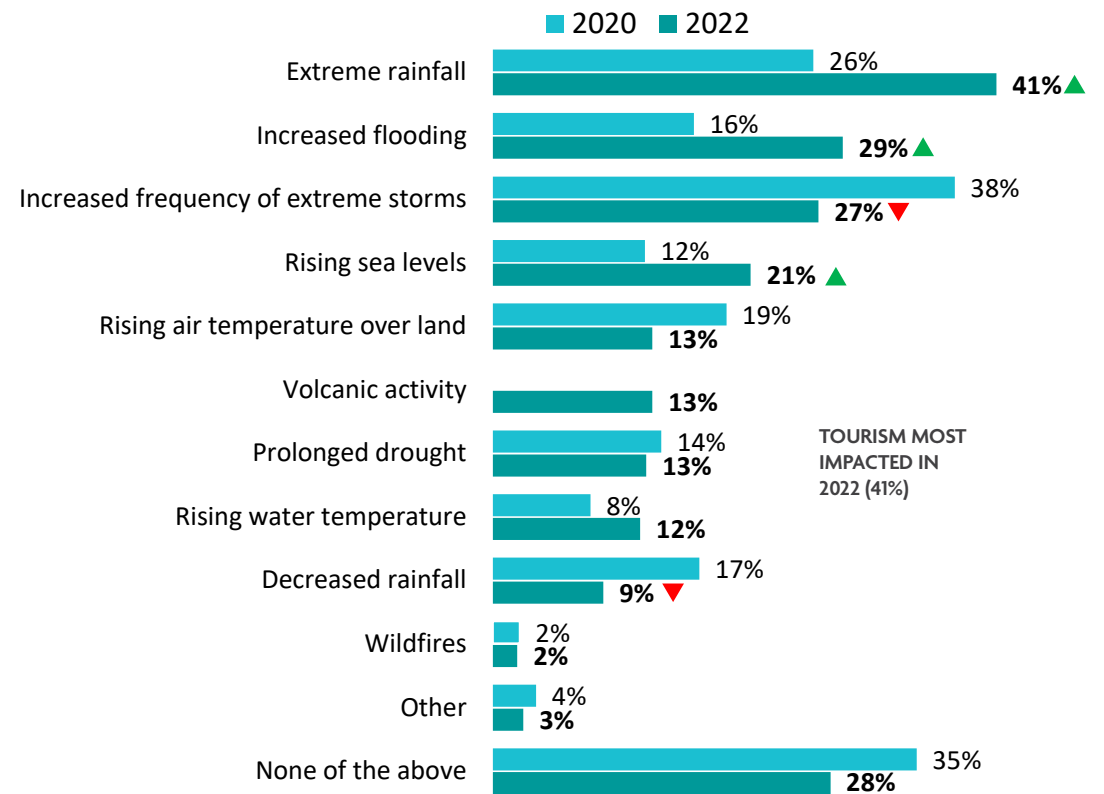
Nearly two-thirds of all exporters have been impacted by extreme weather patterns over the past year, with businesses most affected by extreme rainfall, flooding and rising sea levels.

Q

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



SLIGHT INCREASE ON 2020 WITH 65% OF BUSINESSES IMPACTED



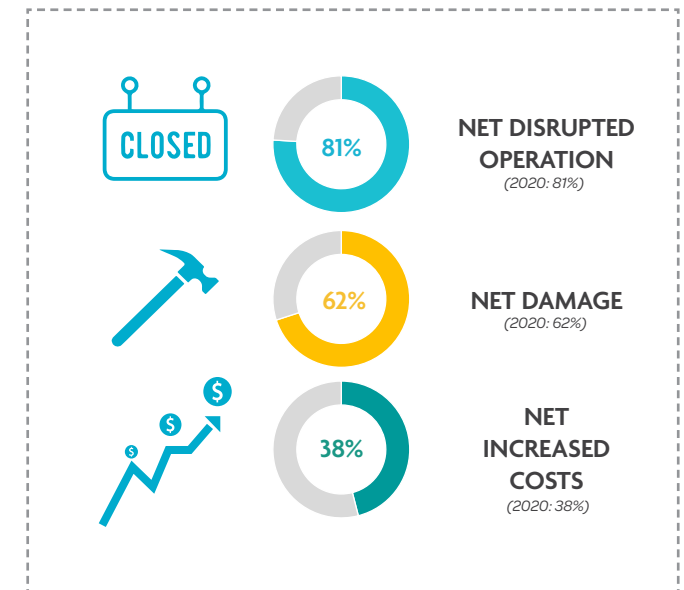
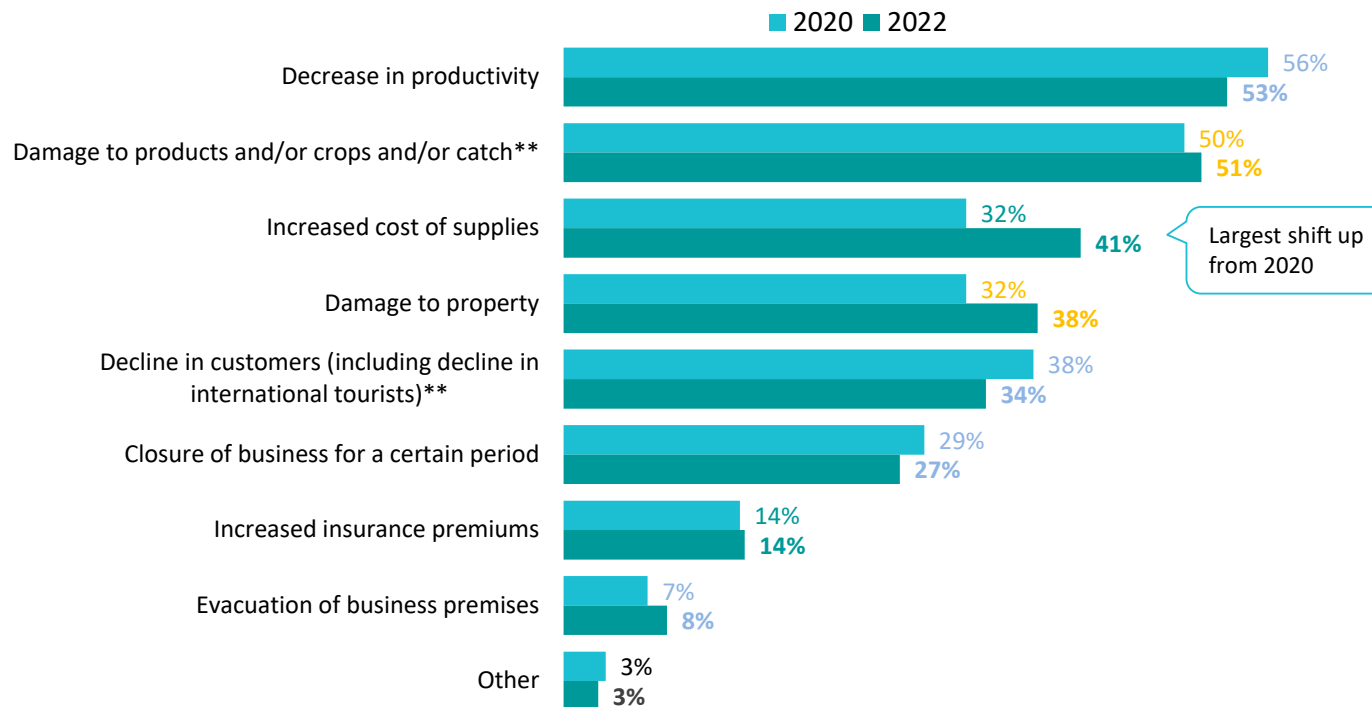
▲▼ Sig. higher/lower than 2020 (95% CI)

# IMPACT OF EXTREME WEATHER PATTERNS

Over three-quarters of respondents suffered disrupted operations due to extreme weather, causing a decline in productivity and in customers. Many also experienced damage to products and property.

Q

HOW HAVE THESE EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS?



# IMPACT OF EXTREME WEATHER PATTERNS – BY INDUSTRY AND EXPORT MATURITY

While extreme weather patterns have had an increasingly negative impact on all industries, Agriculture was the hardest hit in terms of damage to crops, while Tourism businesses struggled with damage to property.



HOW HAVE THESE EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS?

INITIATIVE	OVERALL	EXPORT AREA			EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
Base n=	n=145	n=55	n=45	n=34	n=68	n=77
Decrease in productivity	53%	55%	58%	50%	54%	52%
Damage to products and/or crops and/or catch	51%	75% ▲	56%	24% ▼	56%	47%
Increased cost of supplies	41%	49%	40%	29%	35%	47%
Damage to property	38%	27%	33%	62% ▲	34%	42%
Decline in customers (including decline in international tourists)	34%	16% ▼	40%	53% ▲	31%	36%
Closure of business for a certain period	27%	31%	29%	21%	22%	31%
Increased insurance premiums	14%	7%	18%	21%	6% ▼	22%
Evacuation of business premises	8%	5%	11%	9%	6%	10%
<b>NET DISRUPTED BUSINESS OPERATIONS</b>	76%	73%	82%	76%	75%	77%
<b>NET DAMAGE</b>	70%	78%	64%	74%	74%	66%
<b>NET INCREASED COSTS</b>	46%	51%	49%	35%	35% ▼	56%

▲▼ Sig. higher/lower than 2020 (95% CI)

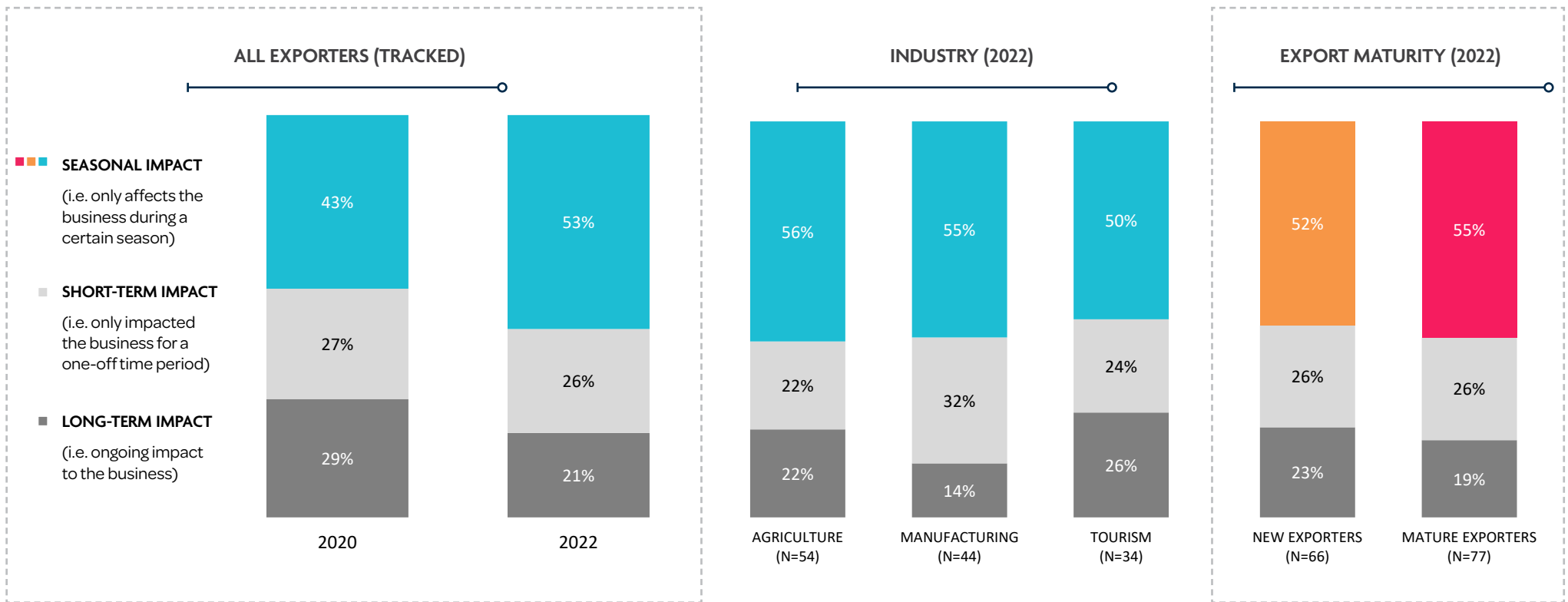
▲▼ New Sig. higher/lower than Mature (95% CI)



# TIME FRAME OF IMPACT

Of the businesses that were impacted by extreme weather, more than half reported a seasonal impact.

## Q TIME FRAME OF THIS IMPACT?

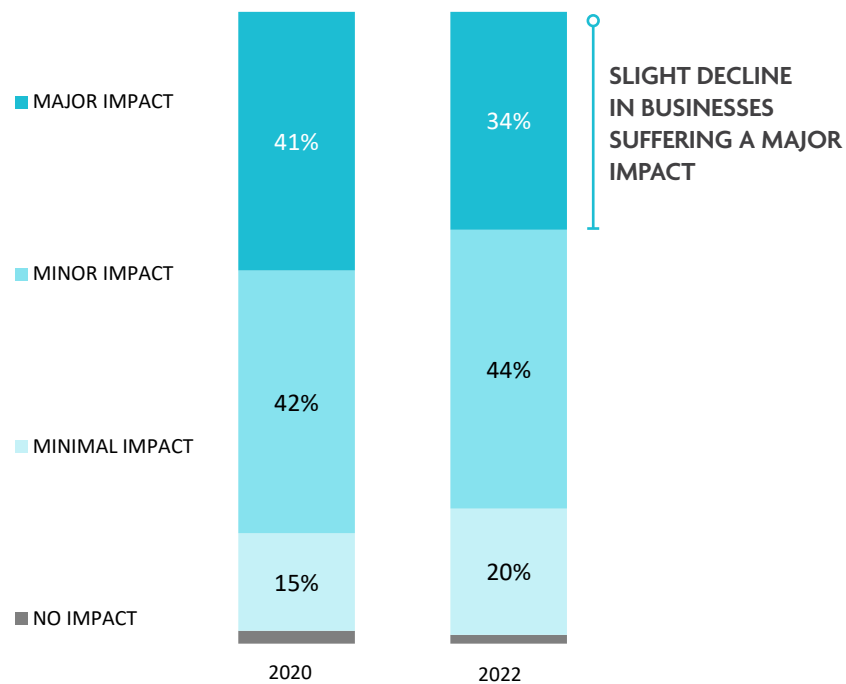


# IMPACT OF EXTREME WEATHER PATTERNS – BY SEVERITY

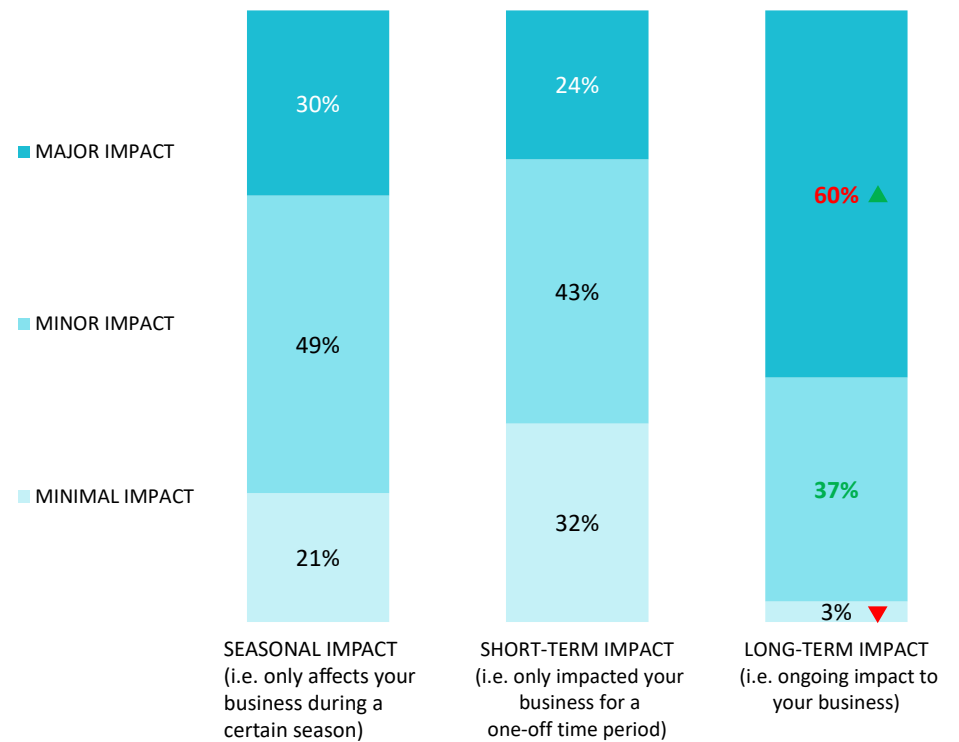
Nearly two-thirds of those who reported extreme weather to have caused long-term impacts to their business, also reported that impact to be major.

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

(AMONG BUSINESSES THAT HAVE BEEN IMPACTED IN PAST 12 MONTHS)



(AMONG BUSINESSES THAT HAVE HAD MINIMAL, MINOR OR MAJOR IMPACT)



▲ ▼ Sig. higher/lower than total (95% CI)

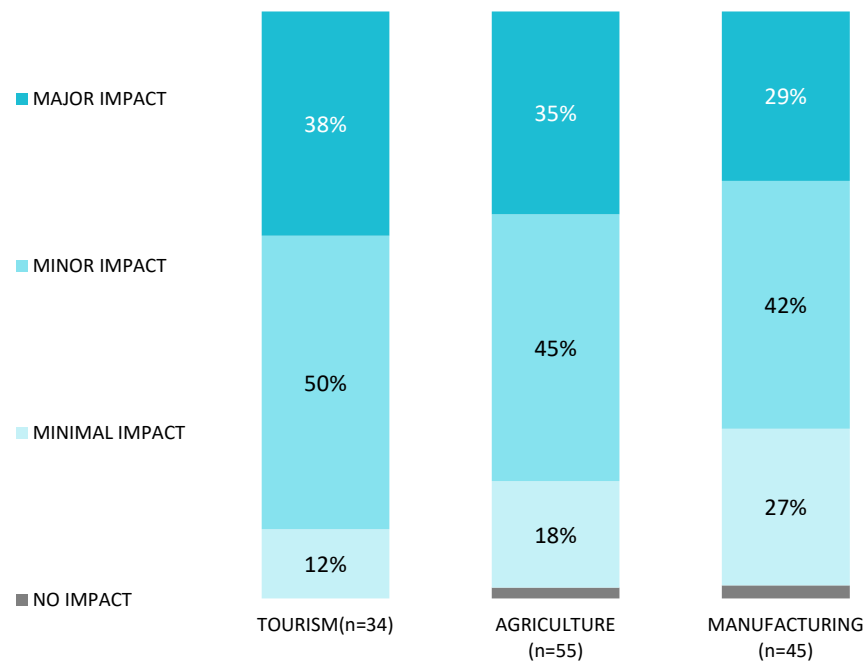
# IMPACT OF EXTREME WEATHER PATTERNS – BY LONGEVITY

Manufacturing businesses are slightly less likely than other industries to have reported major long-term, organisational impact due to extreme weather.

Q

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

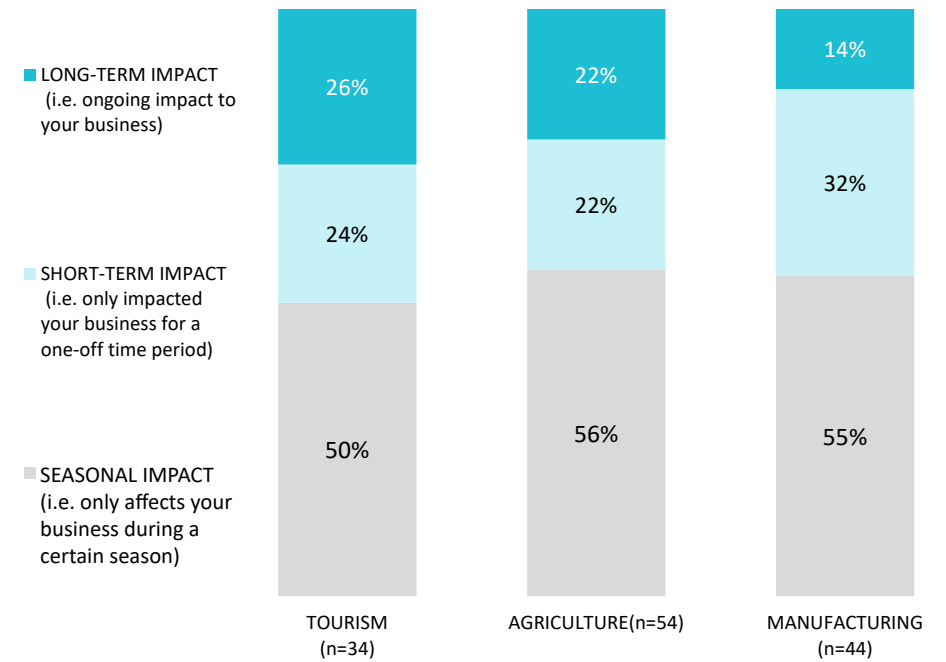
(AMONG BUSINESSES THAT HAVE BEEN IMPACTED IN THE PAST 12 MONTHS)



Q

... AND THE TIME FRAME OF THIS IMPACT?

(AMONG BUSINESSES THAT HAVE HAD MINIMAL, MINOR OR MAJOR IMPACT)





# INITIATIVES TO INCREASE EXPORT

# INITIATIVES ACTIVATED TO INCREASE EXPORT ORDERS

Similar to 2020, exporters are driving growth through a range of initiatives, including improving process efficiency, introducing new products and services and enhancing online marketing.

Q

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

	2022	2020	2018	2016
Improved business processes to improve efficiency	50%	46%	43%	40%
Developed new products/services specifically for export markets	47%	45%	43%	44%
Enhanced marketing through online channels	40%	42%	43%	*
Implemented new technology platforms	30%	26%	22%	27%
Repositioned the business to align with export markets	28%	27%	30%	32%
Allocated more time and money to drive innovation	28%	36%	34%	36%
Contacted Pacific Trade Invest for assistance	28%	26%	28%	32%
Entered new markets	27%	35%	39%	39%
Improved ecommerce capabilities	26%	29%	26%	*
Hired new staff/trained encourage innovation across the organisation	23%	28%	33%	32%
Improved speed of delivery	22%	25%	20%	32%

\* New statements added in 2018

▲ ▼ Sig. higher/lower than 2020 (95% CI)

# INITIATIVES ACTIVATED TO INCREASE EXPORT ORDERS – BY INDUSTRY AND EXPORT MATURITY

Exporters in manufacturing instigated the most initiatives to increase export orders overall, while mature exporters activated significantly more initiatives than new exporters.

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

INITIATIVE	OVERALL	EXPORT AREA			EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
<i>Base n=</i>	<i>n=200</i>	<i>n=64</i>	<i>n=67</i>	<i>n=53</i>	<i>n=90</i>	<i>n=110</i>
Improved business processes to improve efficiency	50%	55%	63%	42%	44%	55%
Developed new products/services specifically for export markets	47%	50%	60%	34%	49%	45%
Enhanced marketing through online channels	40%	36%	43%	43%	41%	38%
Implemented new technology platforms	30%	28%	36%	26%	27%	32%
Repositioned the business to align with export markets	28%	30%	42% ▲	13%	31%	25%
Allocated more time and money to drive innovation	28%	31%	33%	17%	27%	28%
Contacted Pacific Trade Invest for assistance	28%	31%	39%	15%	28%	27%
Entered new markets	27%	36%	25%	17%	31%	24%
Improved ecommerce capabilities	26%	22%	31%	28%	26%	25%
Hired/trained new staff to encourage innovation across the organisation	23%	19%	27%	19%	17%	27%
Improved speed of delivery	22%	30%	31%	2%	26%	19%

▲ ▼ Sig. higher/lower than total (95% CI)

# ECOMMERCE

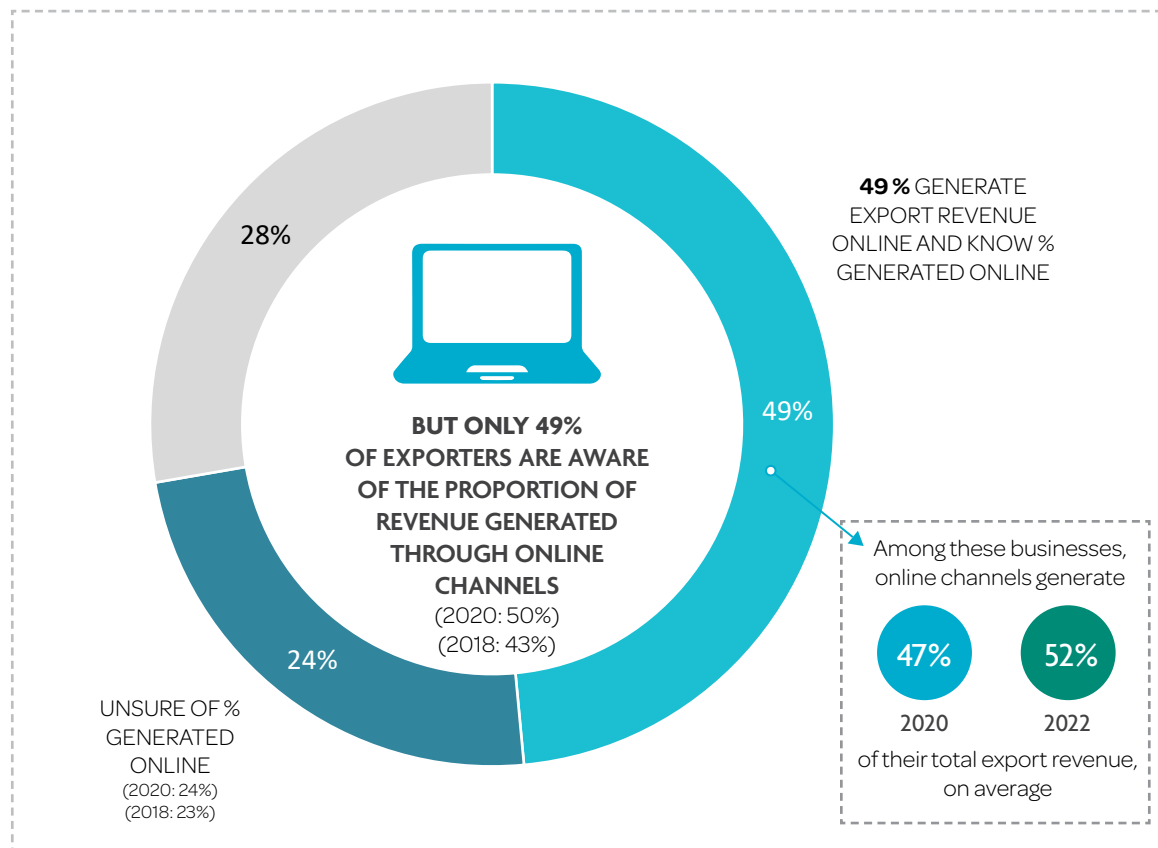
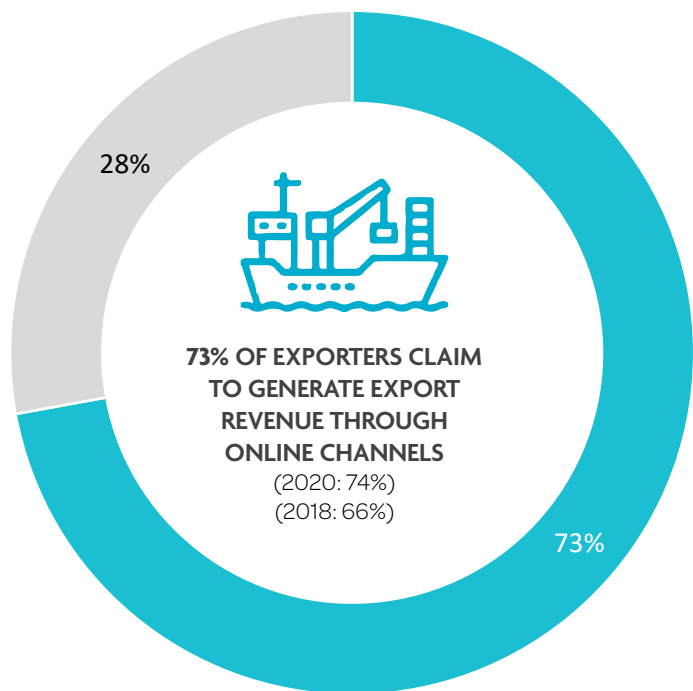


# EXPORT REVENUE GENERATED THROUGH ONLINE CHANNELS

Similar to 2020, just under three-quarters of exporters used online channels to generate export revenue.

Q

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



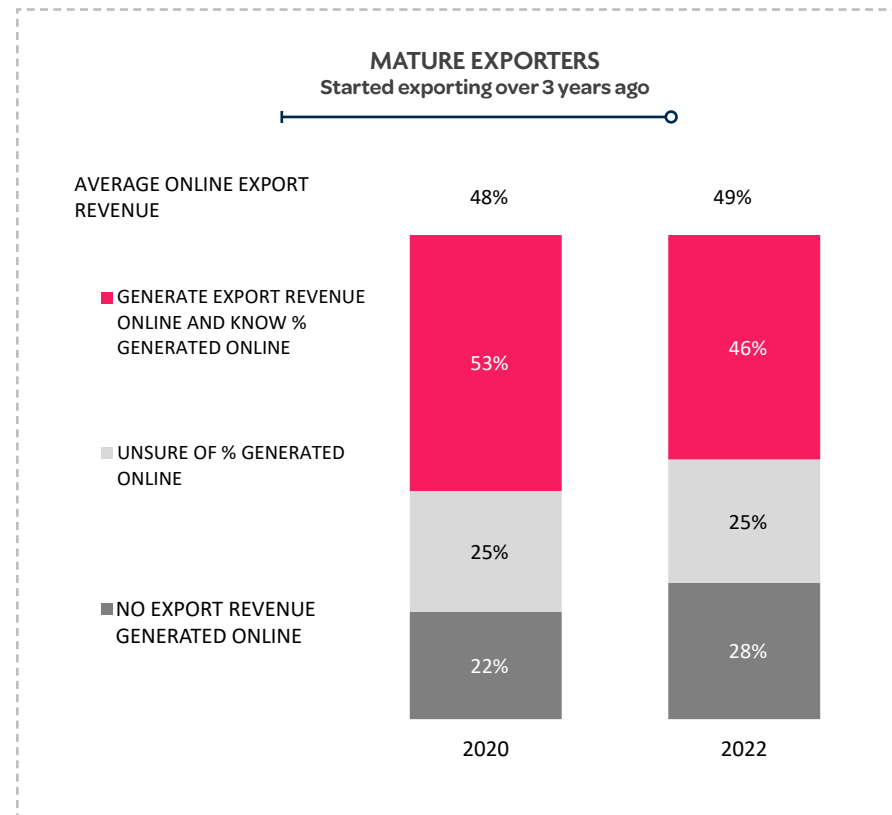
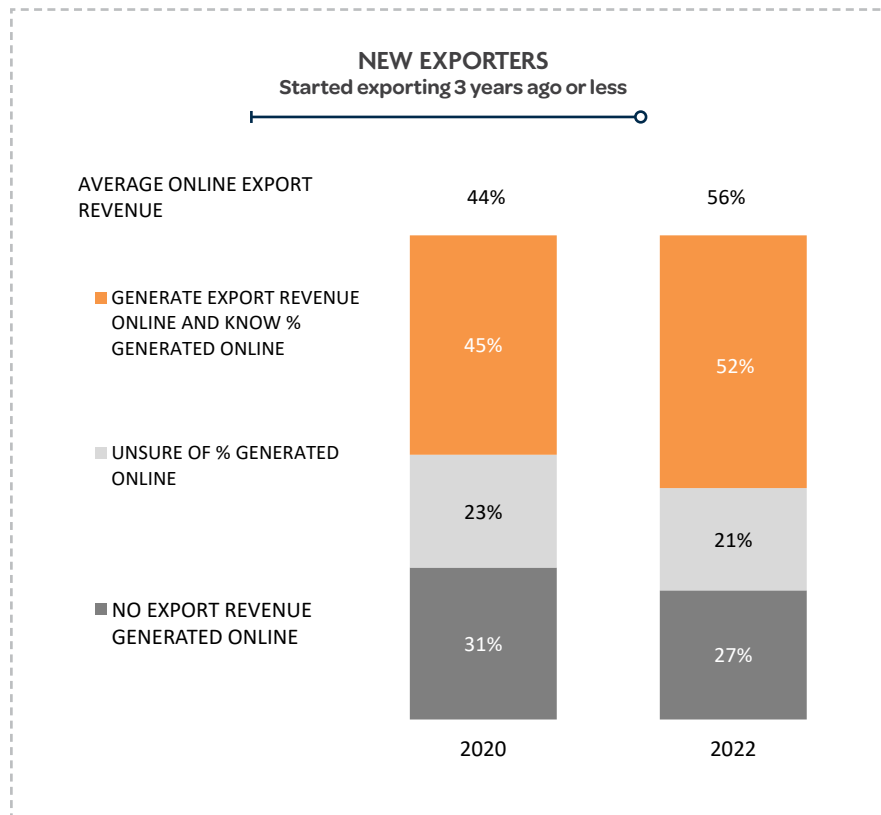


# EXPORT REVENUE GENERATED THROUGH ONLINE CHANNELS – BY EXPORT MATURITY

There has been a significant increase in the proportion of revenue generated online by new exporters.

Q

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

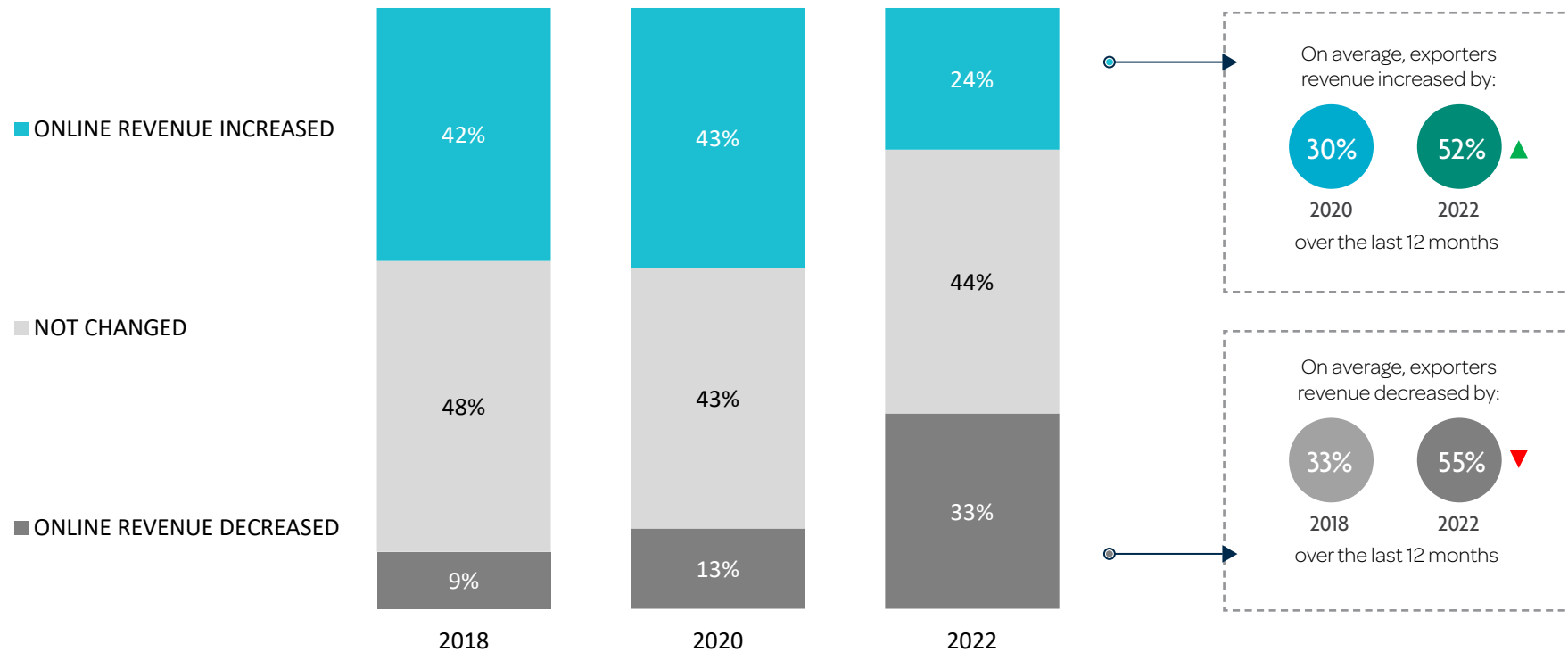


# EXPORT REVENUE GENERATED THROUGH ONLINE CHANNELS - BY CHANGE OVER LAST 12 MONTHS

Despite online sales representing a higher proportion of overall export sales in 2022, only a small proportion reported an increase in online revenue, in line with the overall loss of revenue experienced by businesses.

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

(AMONG EXPORTERS THAT GENERATE EXPORT REVENUE THROUGH ONLINE CHANNELS)



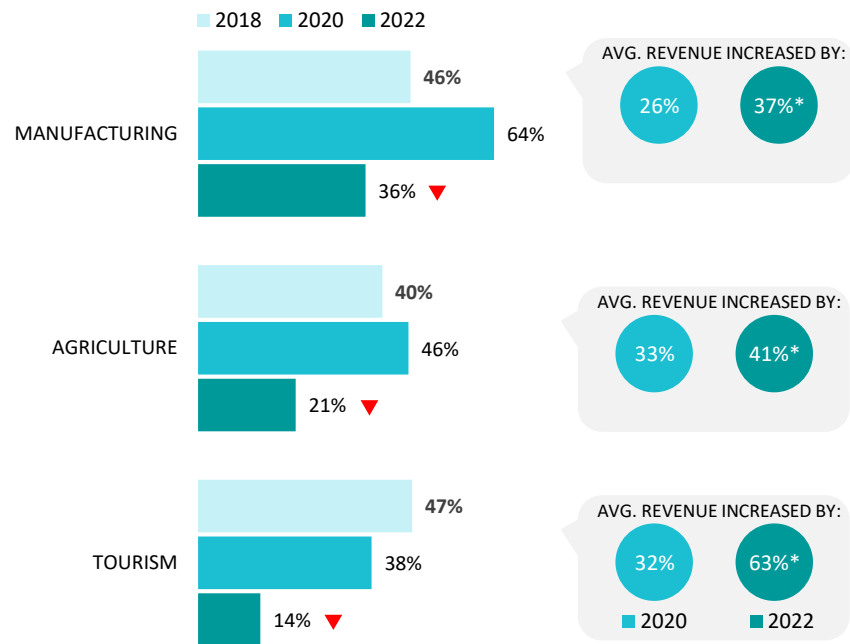
▲ ▼ Sig. higher/lower than 2020 (95% CI)

# EXPORT REVENUE GENERATED THROUGH ONLINE CHANNELS – BY CHANGE OVER LAST 12 MONTHS

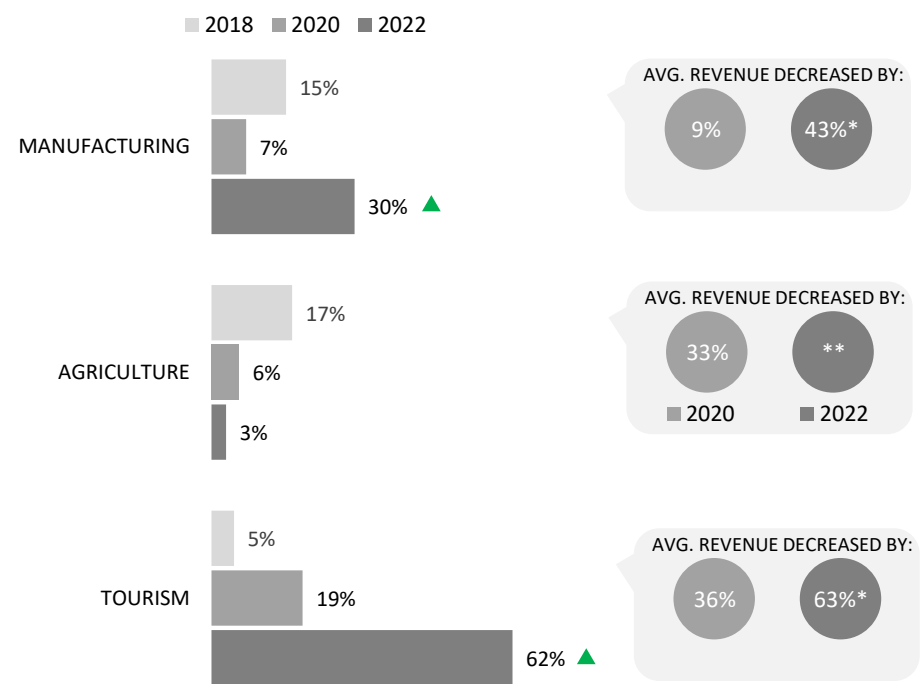
Export revenue generated through online channels has decreased significantly in the tourism and manufacturing industries.

## Q 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

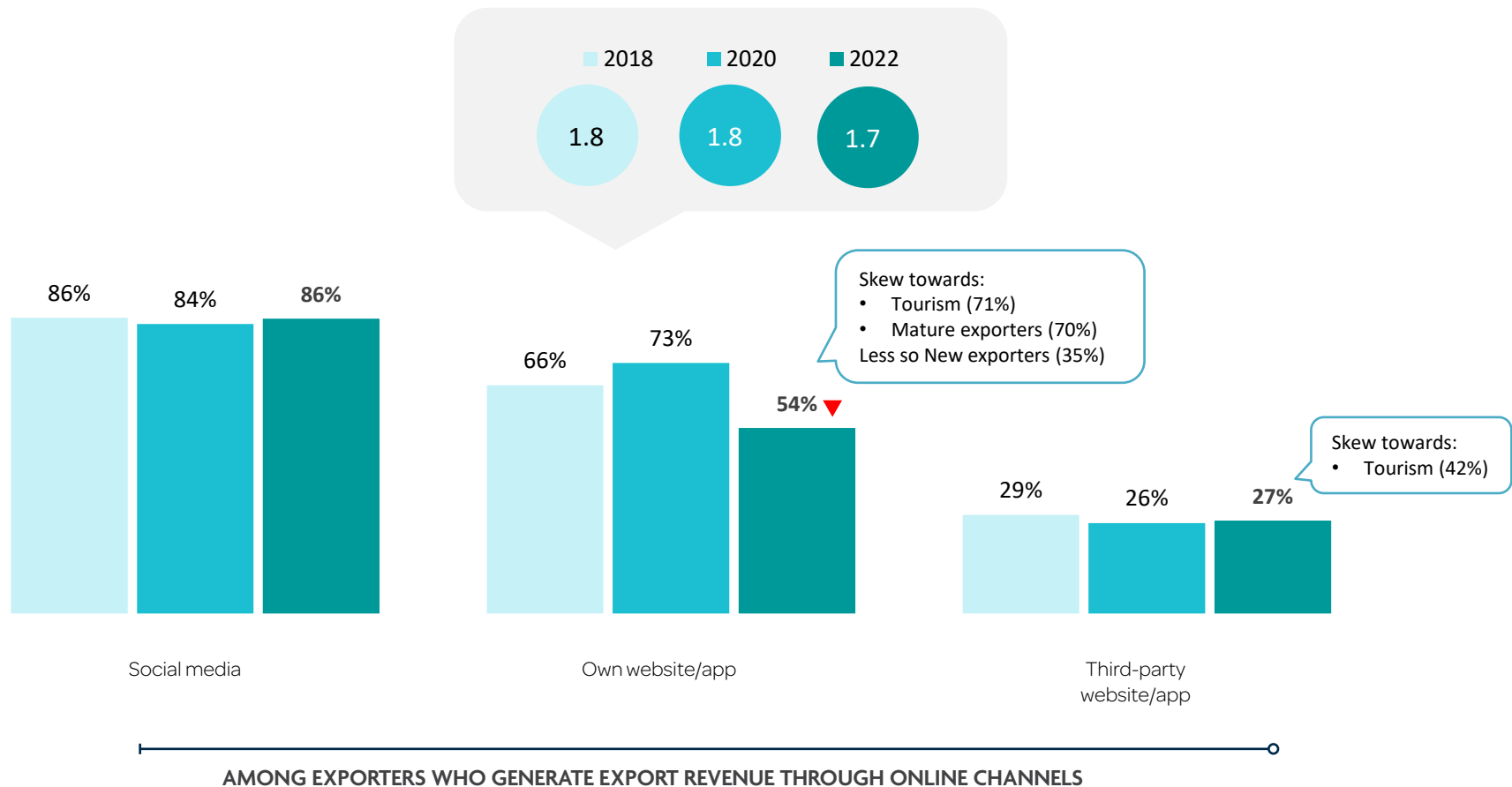


▲ ▼ Sig. higher/lower than 2020 (95% CI)

# ONLINE CHANNEL USAGE

The most common online channel used by businesses to generate export revenue is social media, followed by owned websites.

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



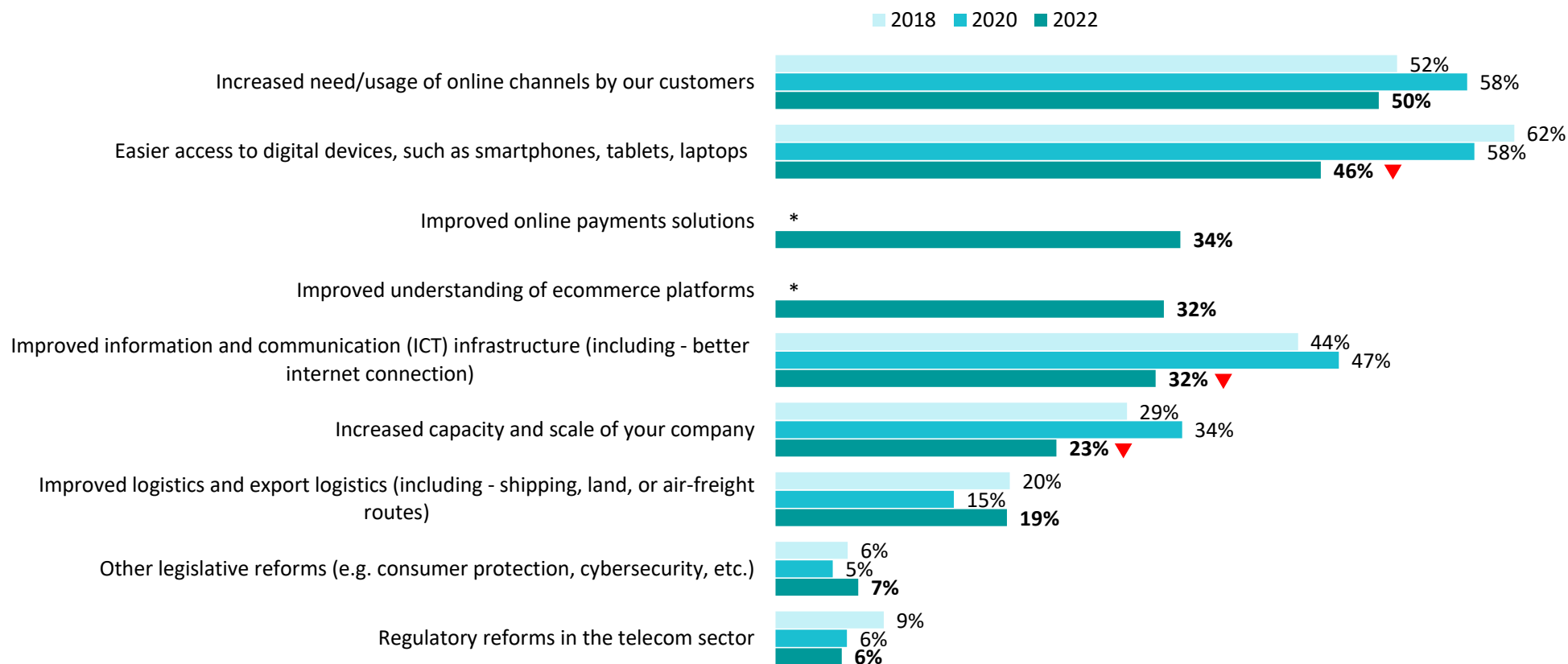
▲▼ Sig. higher/lower than 2020 (95% CI)

# POSITIVE FACTORS IMPACTING ECOMMERCE

Exporters continue to cite a range of factors that positively impact their ecommerce activities, including the increased use of online channels by customers and easier access to digital devices; however, since 2020 these have decreased in impact.

Q

WHAT FACTORS HAVE POSITIVELY IMPACTED YOUR ECOMMERCE ACTIVITIES?



AMONG EXPORTERS WHO GENERATE EXPORT REVENUE THROUGH ONLINE CHANNELS

\* New statements added in 2018

▲ ▼ Sig. higher/lower than 2020 (95% CI)

# POSITIVE FACTORS IMPACTING ECOMMERCE

Manufacturing and mature businesses are seeing the least positive impact from improved ICT infrastructure on ecommerce activities. Agriculture businesses and new exporters, however, are citing more positive impacts from logistics improvement.

Q

WHAT FACTORS HAVE POSITIVELY IMPACTED YOUR ECOMMERCE ACTIVITIES?

INITIATIVE	OVERALL	EXPORT AREA			EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
<i>Base n=</i>	<i>n=145</i>	<i>n=31</i>	<i>n=54</i>	<i>n=48</i>	<i>n=66</i>	<i>n=79</i>
Increased usage of online channels by your customers	50%	52%	50%	56%	56%	46%
Easier access to digital devices	46%	35%	50%	48%	47%	44%
Improved online payments solutions	34%	29%	28%	42%	30%	37%
Improved understanding of ecommerce platforms	32%	39%	37%	27%	35%	30%
Improved information and communication (ICT)	32%	39%	24%	38%	36%	28%
Increased capacity and scale of your company	23%	29%	31%	17%	23%	24%
Improved logistics and export logistics	19%	35%	19%	13%	26%	14%
Other legislative reforms	7%	10%	9%	2%	11%	4%
Regulatory reforms in the telecom sector	6%	10%	6%	4%	9%	3%
Avg. number of positive factors mentioned	2.5	2.8	2.5	2.5	2.7	2.3

AMONG EXPORTERS WHO GENERATE EXPORT REVENUE THROUGH ONLINE CHANNELS

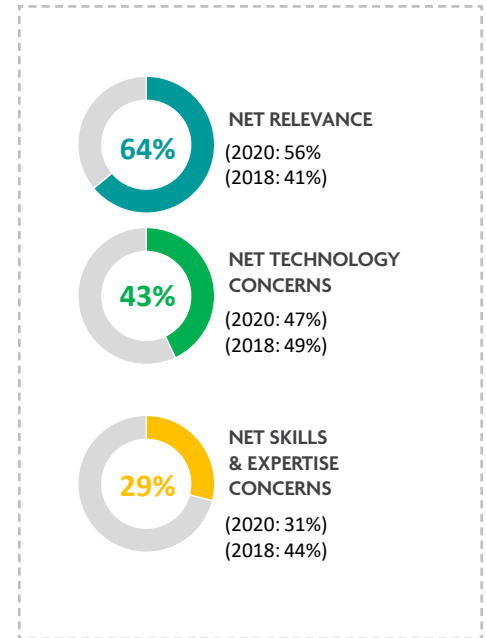
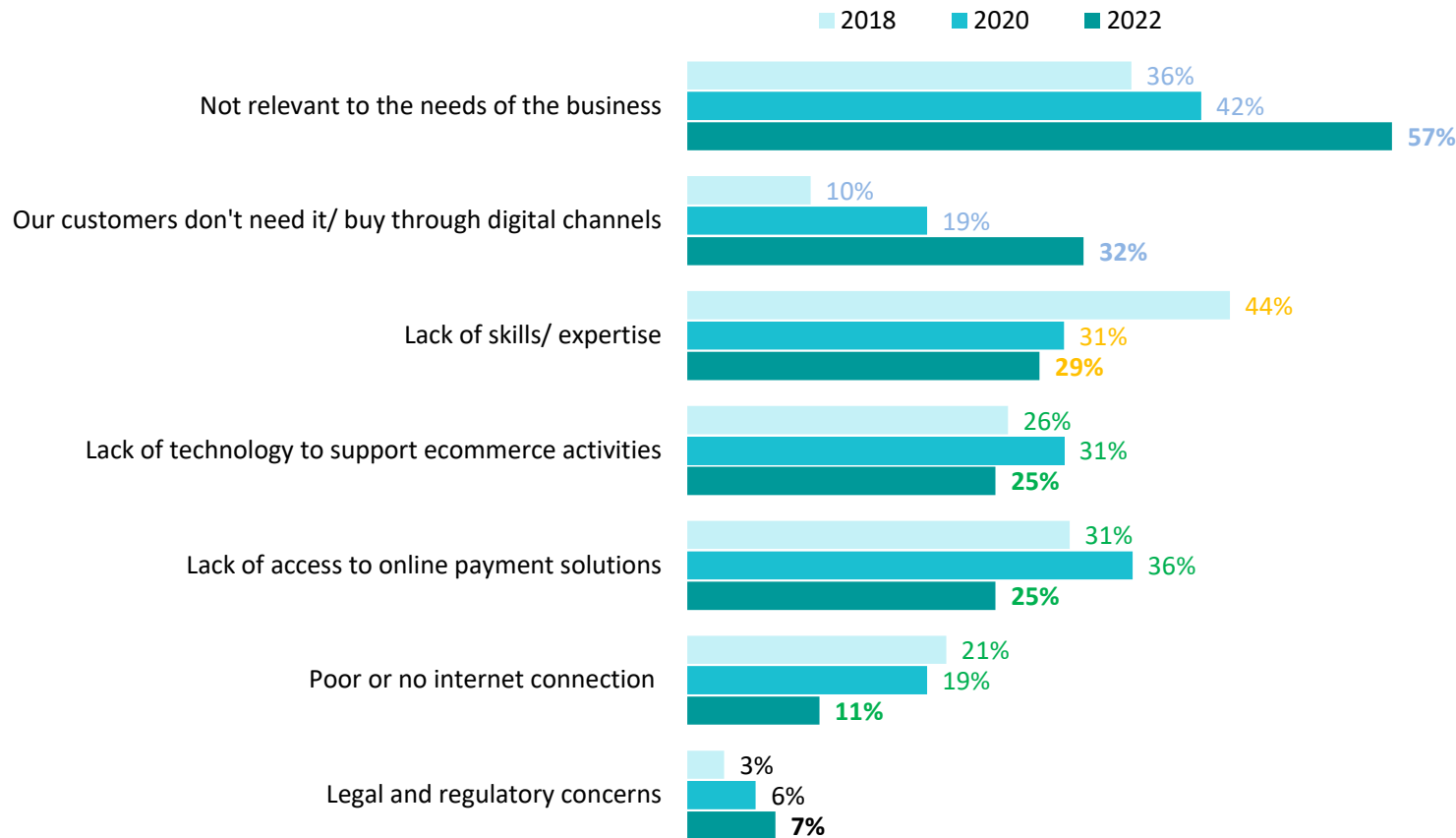
XX%/XX% Sig. higher/lower than 2020 (95% CI)

# REASONS WHY ONLINE CHANNELS ARE NOT USED

Those who do not use online channels to generate export revenue typically think it is not relevant to the needs of their business, believe their customers do not need it, or reported a lack of skills required to use and implement such systems.

Q

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

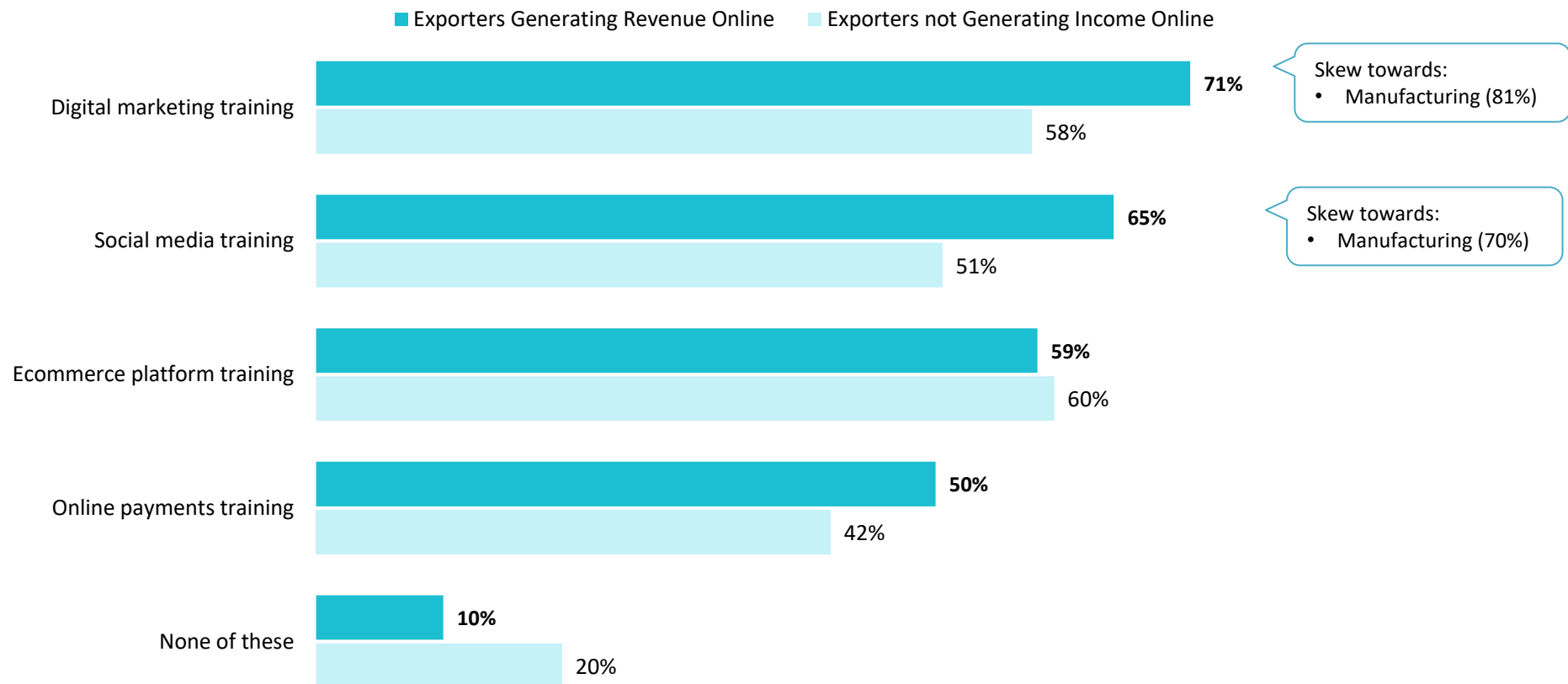


# BENEFIT FROM ECOMMERCE CAPACITY BUILDING OPPORTUNITIES

There is a strong call for ecommerce capacity building, especially from exporters who are already generating revenue online.

Q

WOULD YOU BENEFIT FROM THE FOLLOWING ECOMMERCE CAPACITY BUILDING OPPORTUNITIES?





# EXPORT DESTINATIONS

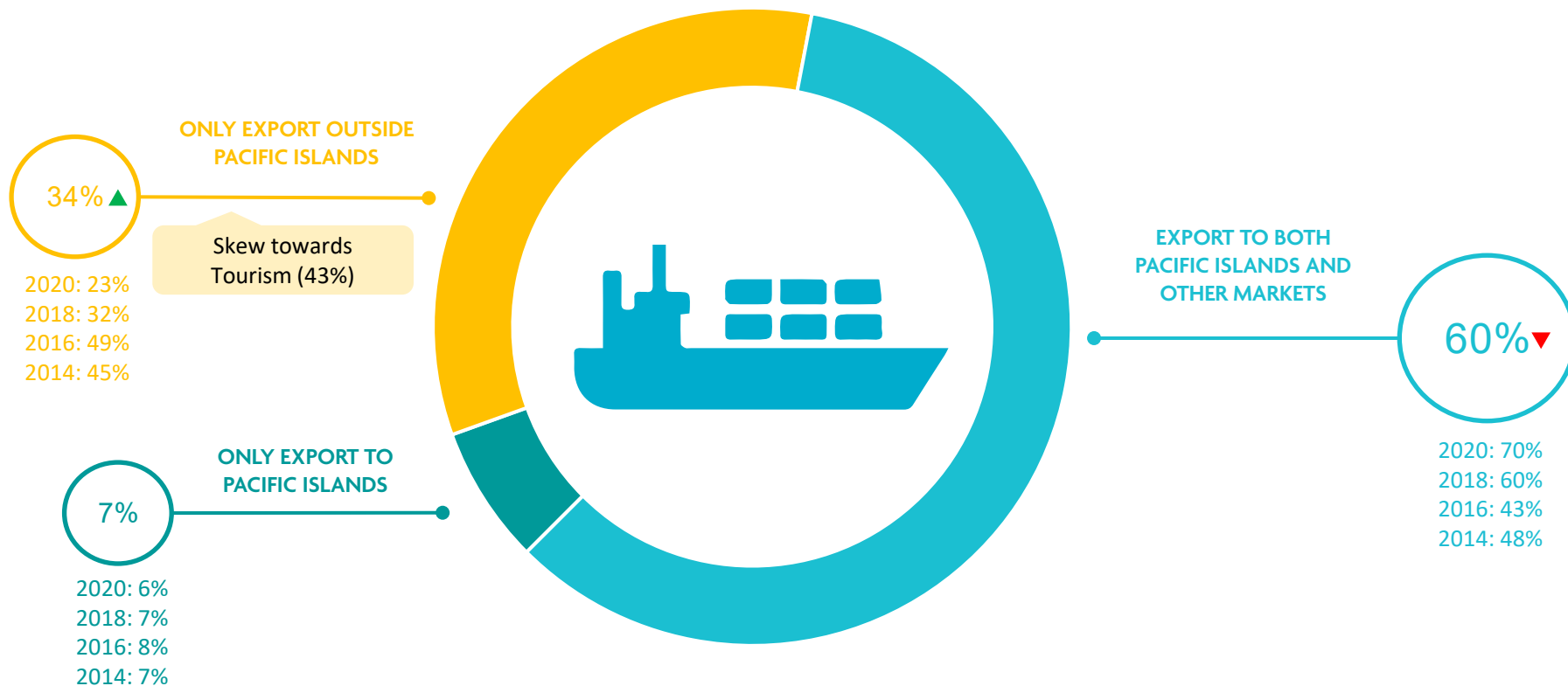


# MARKETS EXPORTED TO OVER THE PAST 12 MONTHS

The majority of respondents trade with both other Pacific Islands and on international markets. Compared with 2020, there is an increase in the number of exporters who are only trading outside of the Pacific Islands.

Q

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



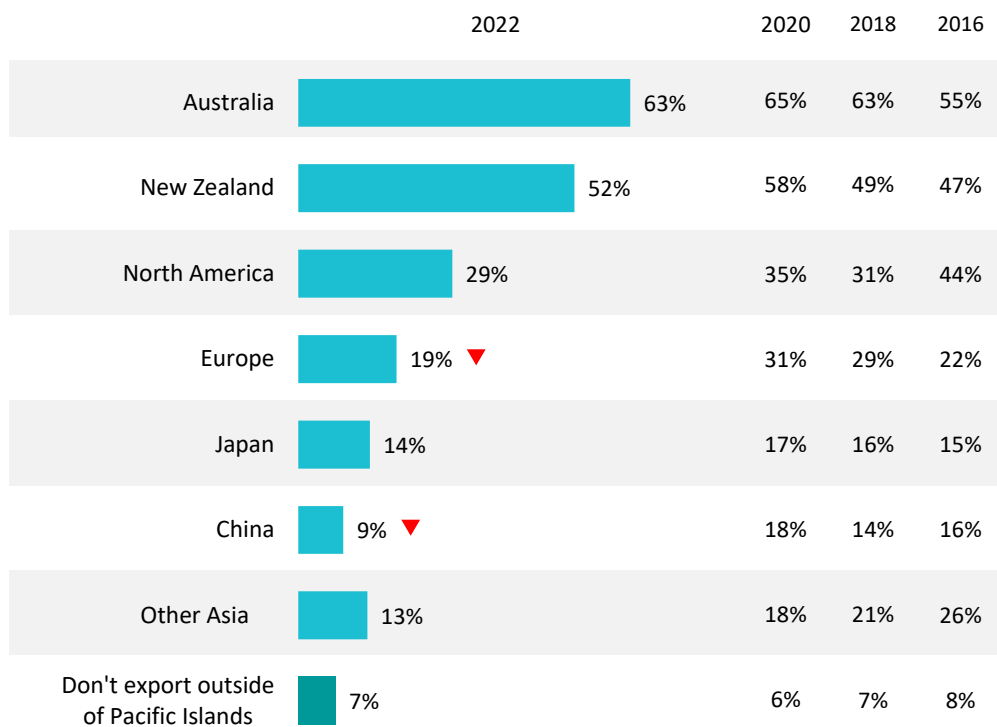
▲ ▼ Sig. higher/lower than 2020 (95% CI)

# GEOGRAPHIC AREAS EXPORT REVENUE GENERATED FROM OVER THE PAST 12 MONTHS

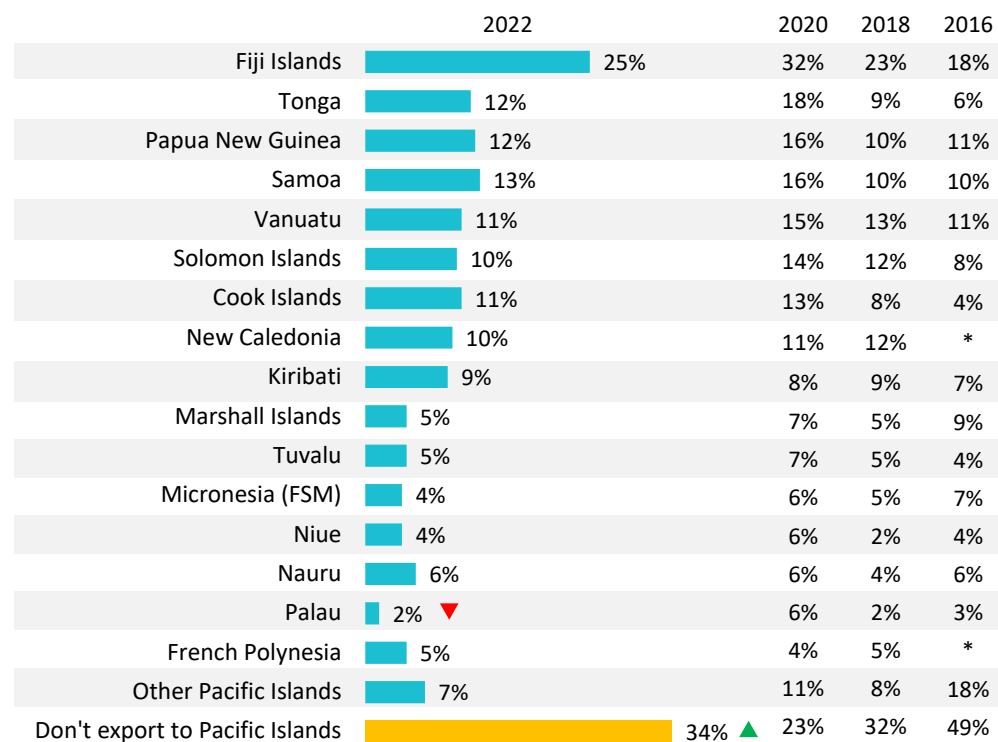
While Australia and New Zealand remain the two key export destinations, export revenue has decreased for most key destinations around the globe.



## EXPORTING OUTSIDE OF PACIFIC ISLANDS



## EXPORTING WITHIN PACIFIC ISLANDS



\* New statements added in 2018

▲ ▼ Sig. higher/lower than 2020 (95% CI)

# COUNTRIES EXPORTED TO OUTSIDE OF PACIFIC ISLANDS

Australia generates much of the export revenue for Manufacturing businesses and new exporters.

## Q IN 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	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
<i>Base n=</i>	<i>n=200</i>	<i>n=64</i>	<i>n=67</i>	<i>n=53</i>	<i>n=90</i>	<i>n=110</i>
Australia	63%	52%	78%	62%	66%	60%
New Zealand	52%	48%	61%	47%	56%	49%
North America	29%	30%	27%	34%	21%	35%
Europe	19%	13%	22%	23%	18%	19%
Japan	14%	20%	10%	11%	10%	16%
China	9%	9%	7%	9%	12%	5%
Other Asia	12%	16%	15%	6%	12%	11%
Net Pacific Islands	67%	64%	72%	57%	69%	65%
<b>Number of regions</b>	<b>2.7</b>	<b>2.6</b>	<b>3.0</b>	<b>2.6</b>	<b>2.7</b>	<b>2.7</b>

XX%/ XX% Sig. higher/lower than 2020 (95% CI)

3.2 in 2020

▲▼ Sig. higher/lower than total (95% CI)

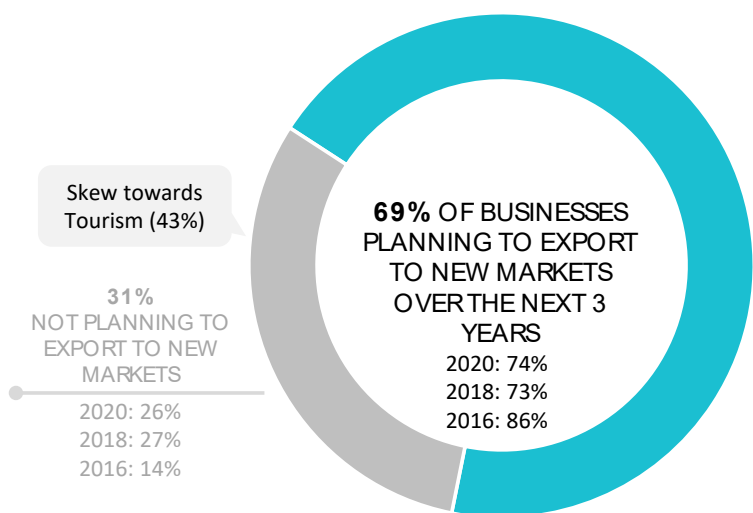
3.9 in 2020

▲▼ New sig. higher/lower than Mature (90% CI)

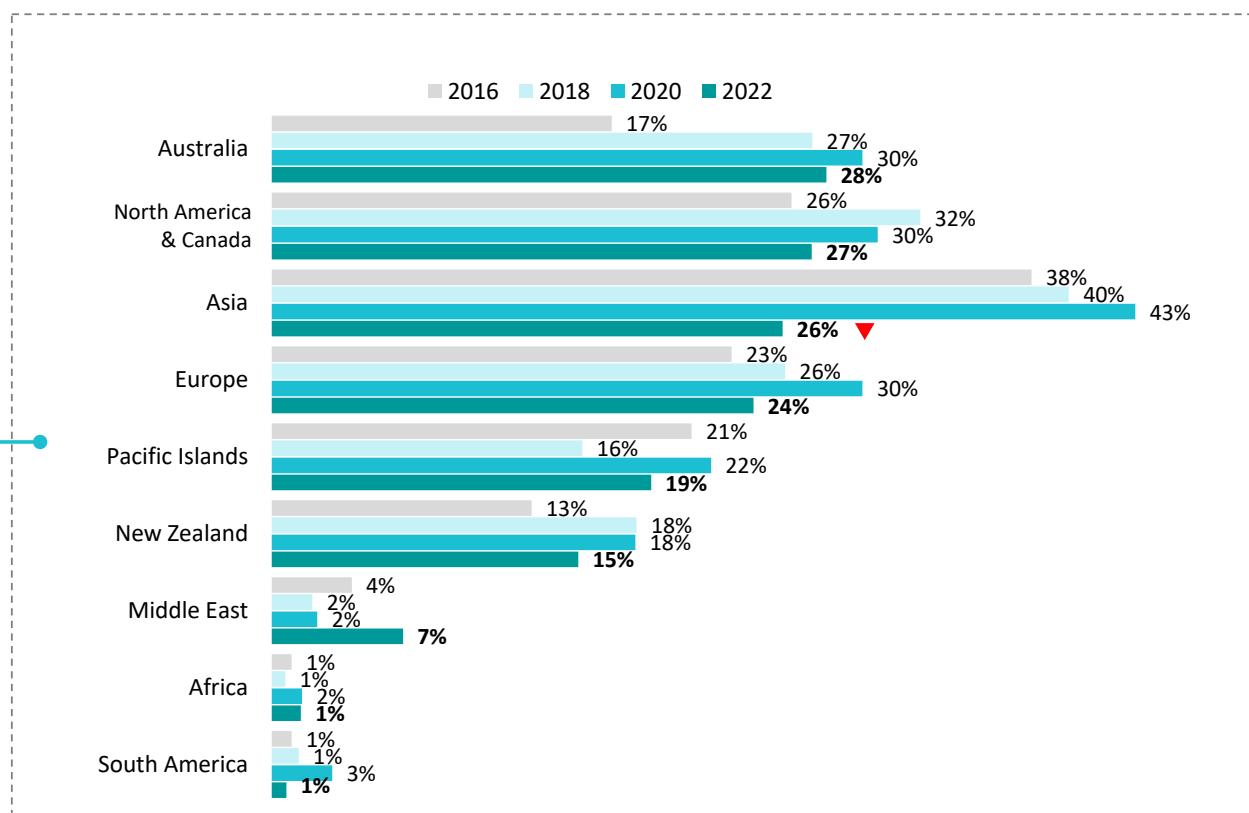
# ENTERING NEW MARKETS OVER THE NEXT THREE YEARS

Seven out of ten exporters in the Pacific are looking to extend their reach into new markets in the next three years, and while the focus on Asia dropped significantly in 2022, the Middle East now has more appeal.

## Q WHAT NEW MARKETS WILL YOU TARGET OVER THE NEXT THREE YEARS?



AMONG BUSINESSES WHO ARE TARGETING NEW MARKETS OVER THE NEXT 3 YEARS



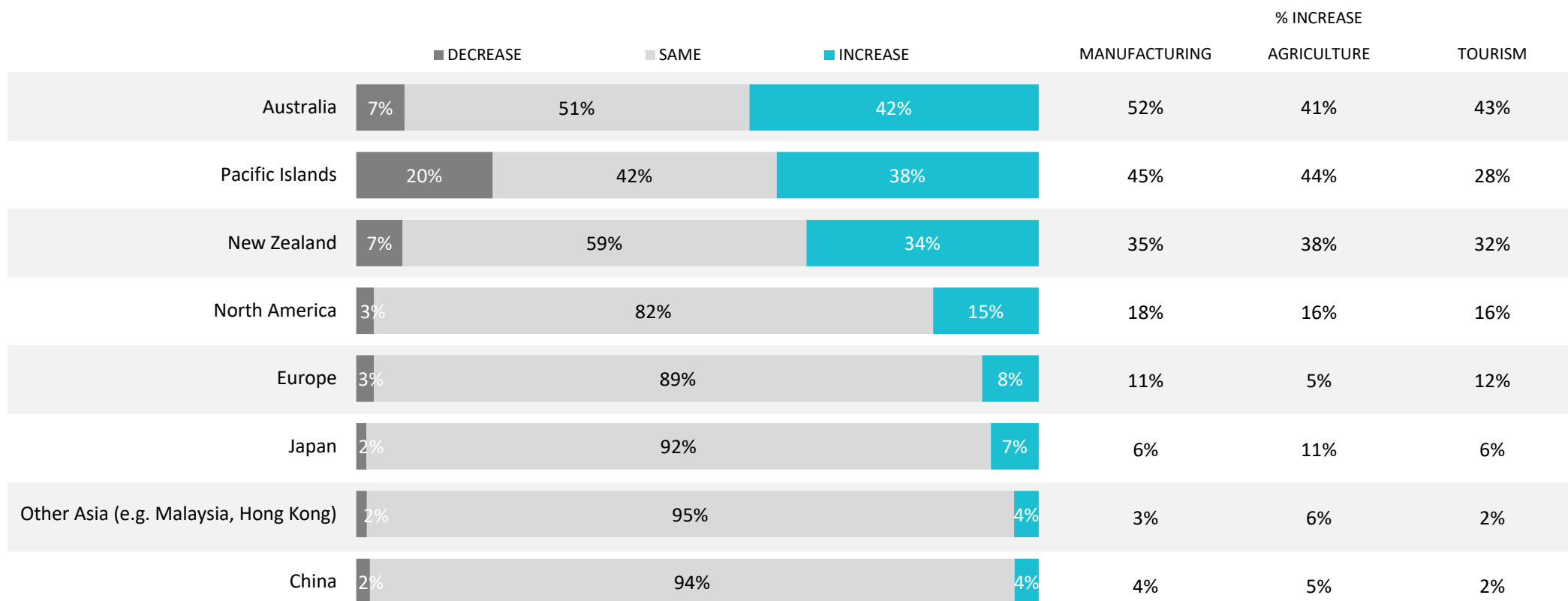
▲ ▼ Sig. higher/lower than 2020 (95% CI)

# CHANGE IN EXPORT MARKETS OVER THE NEXT 12 MONTHS

Exporters are expecting an increase in orders or revenue from most overseas markets, predominantly Australia and other Pacific Islands, over the next 12 months. Over half of manufacturing businesses are expecting an increase of revenue from the Australian market in the next year.

Q

HOW WILL EXPORT ORDERS OR REVENUE FROM OVERSEAS VISITORS CHANGE OVER THE NEXT 12 MONTHS FOR THE FOLLOWING?



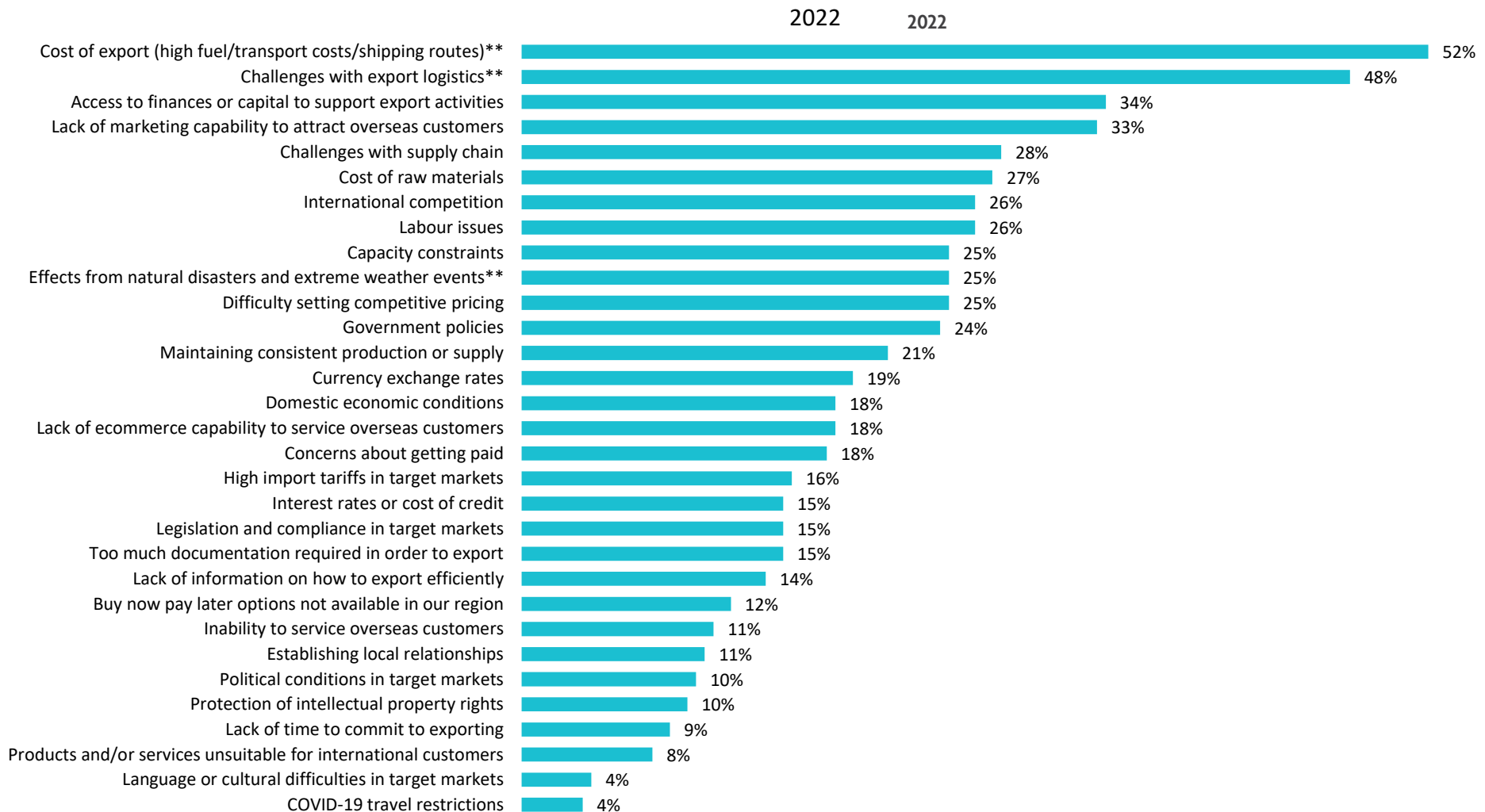


# BARRIERS TO EXPORTING

# TOP BARRIERS TO EXPORTING

Costs of export is the greatest barrier to Pacific exporters selling to overseas customers, followed by challenges related to export logistics.

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



\*\* Slight wording change to attribute in 2022

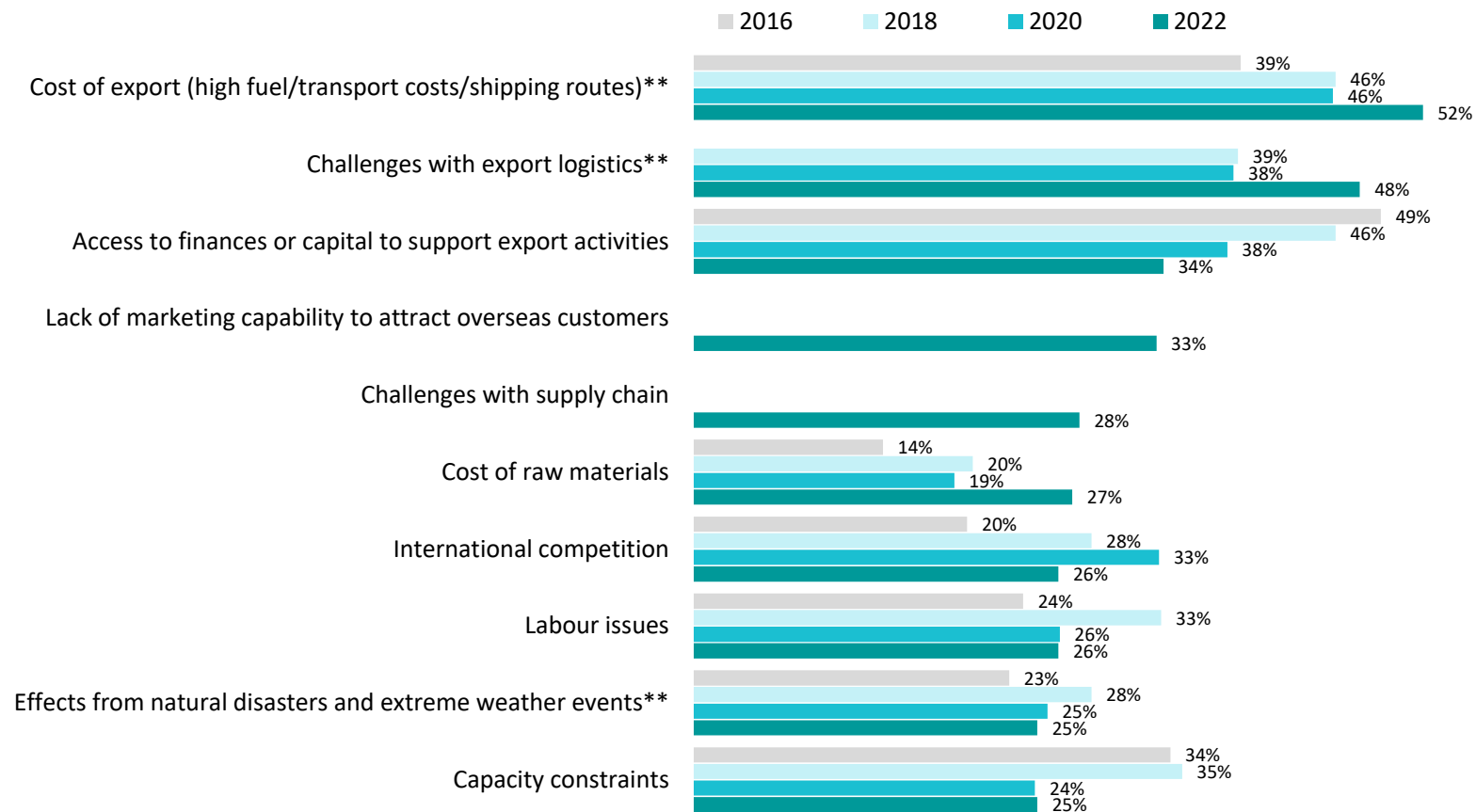
▲ ▼ Sig. higher/lower than 2020 (95% CI)



# TOP 10 BARRIERS TO EXPORTING

Export costs and logistics have increasingly become a barrier to export since tracking began, while access to finance, international competition, labour issues and capacity constraints have decreased.

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



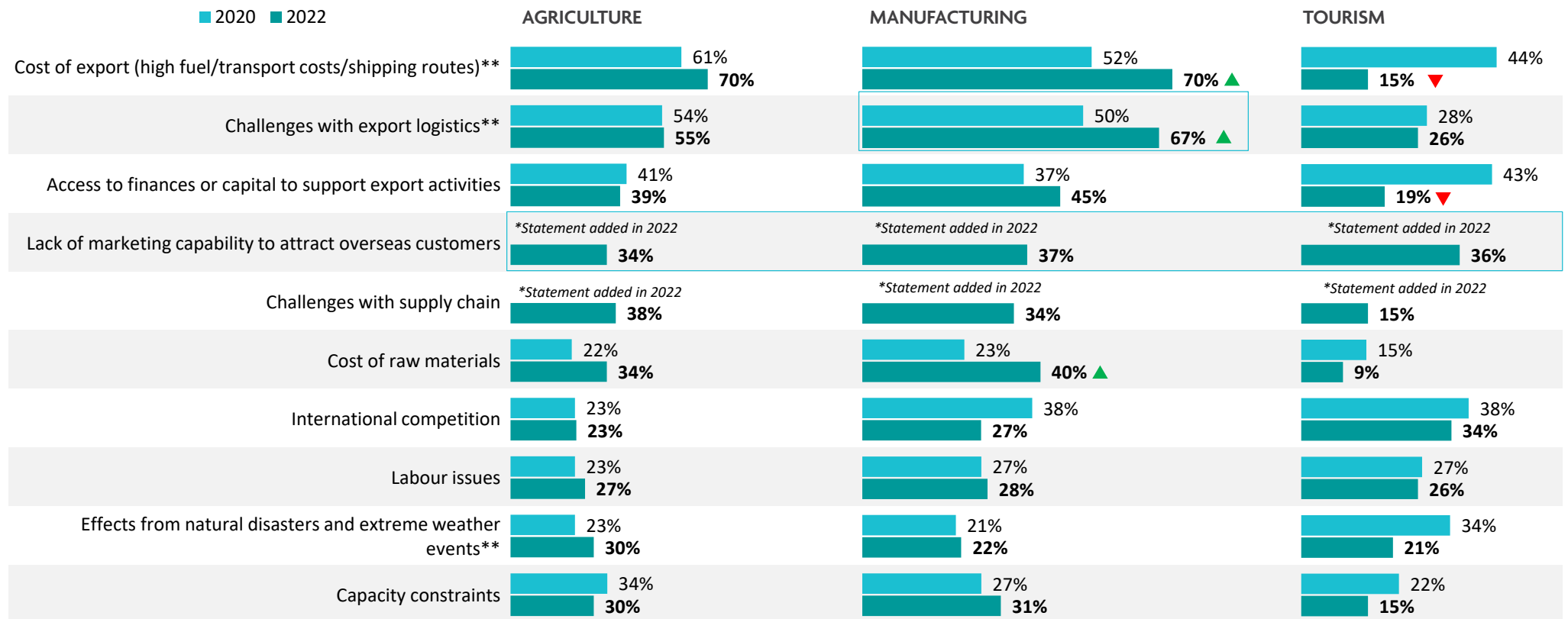
\*\* Slight wording change to attribute in 2022.

# TOP 10 BARRIERS TO EXPORTING – BY INDUSTRY

More than two-thirds of Agriculture and Manufacturing businesses find costs of export to be a barrier to selling to overseas customers, while over one-third of Tourism businesses cite lack of marketing capability as a barrier.

Q

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



\*\* Slight wording change to attribute in 2022

▲ ▼ Sig. higher/lower than 2020 (95% CI)

# TOP 10 BARRIERS TO EXPORTING - BY INDUSTRY AND EXPORT MATURITY

Barriers to export due to export costs, export logistics and cost of raw materials have increased significantly since tracking began, while access to finance, and international competition, labour issues and capacity constraints have decreased.

Q

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	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
Base n=	n=200	n=64	n=67	n=53	n=90	n=110
Cost of export (high fuel/transport costs/shipping routes)**	52%	70% ▲	70% ▲	15% ▼	51%	53%
Challenges with export logistics**	48%	55%	67% ▲	26% ▼	42%	52%
Access to finances or capital to support export activities	34%	39%	45%	19%	47% ▲	23%
Lack of marketing capability to attract overseas customers	33%	34%	37%	36%	39%	28%
Challenges with supply chain	28%	38%	34%	15%	26%	29%
Cost of raw materials	27%	34%	40% ▲	9% ▼	18% ▼	35%
International competition	26%	23%	27%	34%	21%	30%
Labour issues	26%	27%	28%	26%	19% ▼	32%
Effects from natural disasters and extreme weather events**	25%	30%	22%	21%	20%	28%
Capacity constraints	25%	30%	31%	15%	24%	25%

▲▼ Sig. higher/lower than total (95% CI)

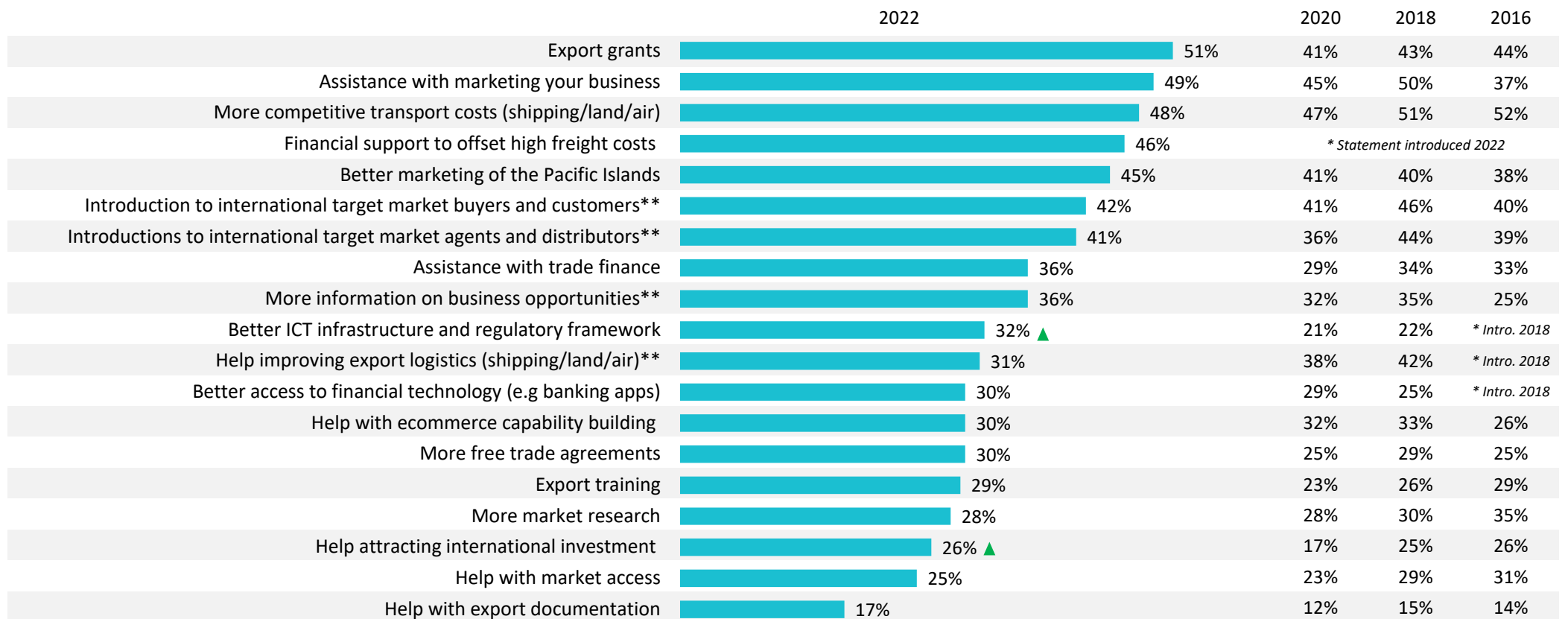
▲▼ New sig. higher/lower than Mature (95% CI)

\*\* Slight wording change to attribute in 2022

# ASSISTANCE NEEDED TO INCREASE EXPORTS

Assistance with export grants, business marketing and transport costs would encourage businesses to increase export activity.

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



\*\* Slight wording change to attribute in 2022

▲ ▼ Sig. higher/lower than 2020 (95% CI)

# ASSISTANCE NEEDED TO INCREASE EXPORTS - BY INDUSTRY AND EXPORT MATURITY

New exporters appear to be seeking more assistance than mature exporters, calling for support with export grants, assistance with trade finance, and introductions to international target market buyers and customers. A larger portion of mature exporters report that more competitive transport costs would encourage an increase in their export activity.



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

INITIATIVE	OVERALL	EXPORT AREA			EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	NEW	MATURE
<i>Base n=</i>	<i>n=200</i>	<i>n=64</i>	<i>n=67</i>	<i>n=53</i>	<i>n=90</i>	<i>n=110</i>
Export grants	51%	61%	70% ▲	25% ▼	59% ▲	45%
Assistance with marketing your business	49%	42%	63% ▲	49%	47%	51%
More competitive transport costs (shipping/land/air)	48%	58%	61% ▲	26% ▼	38% ▼	55%
Financial support to offset high freight costs	46%	64% ▲	57%	21% ▼	49%	44%
Better marketing of the Pacific Islands	45%	34%	45%	55%	48%	42%
Introduction to international target market buyers/cust.**	42%	42%	51%	34%	43%	41%
Introductions to international target market agents/distr.**	41%	48%	52%	28%	49% ▲	35%
Assistance with trade finance	36%	41%	43%	30%	44% ▲	29%
More information on business opportunities**	36%	30%	40%	34%	41%	32%
Better ICT infrastructure and regulatory framework	32%	33%	34%	28%	34%	29%
Help improving export logistics (shipping/land/air)**	31%	44%	42%	11% ▼	32%	30%
Better access to financial technology (e.g banking apps)	30%	23%	28%	45% ▲	32%	27%
Help with ecommerce capability building	30%	31%	34%	28%	39% ▲	22%
More free trade agreements	30%	44% ▲	36%	11% ▼	28%	31%
Export training	29%	30%	42% ▲	17%	37% ▲	23%
More market research	28%	30%	39%	17%	34%	23%
Help attracting international investment	26%	23%	30%	26%	31%	22%
Help with market access	25%	31%	25%	23%	28%	22%
Help with export documentation	17%	16%	25%	11%	22%	13%

XX%/ XX% Sig. higher/lower than 2020 (95% CI)

▲▼ Sig. higher/lower than total (95% CI)

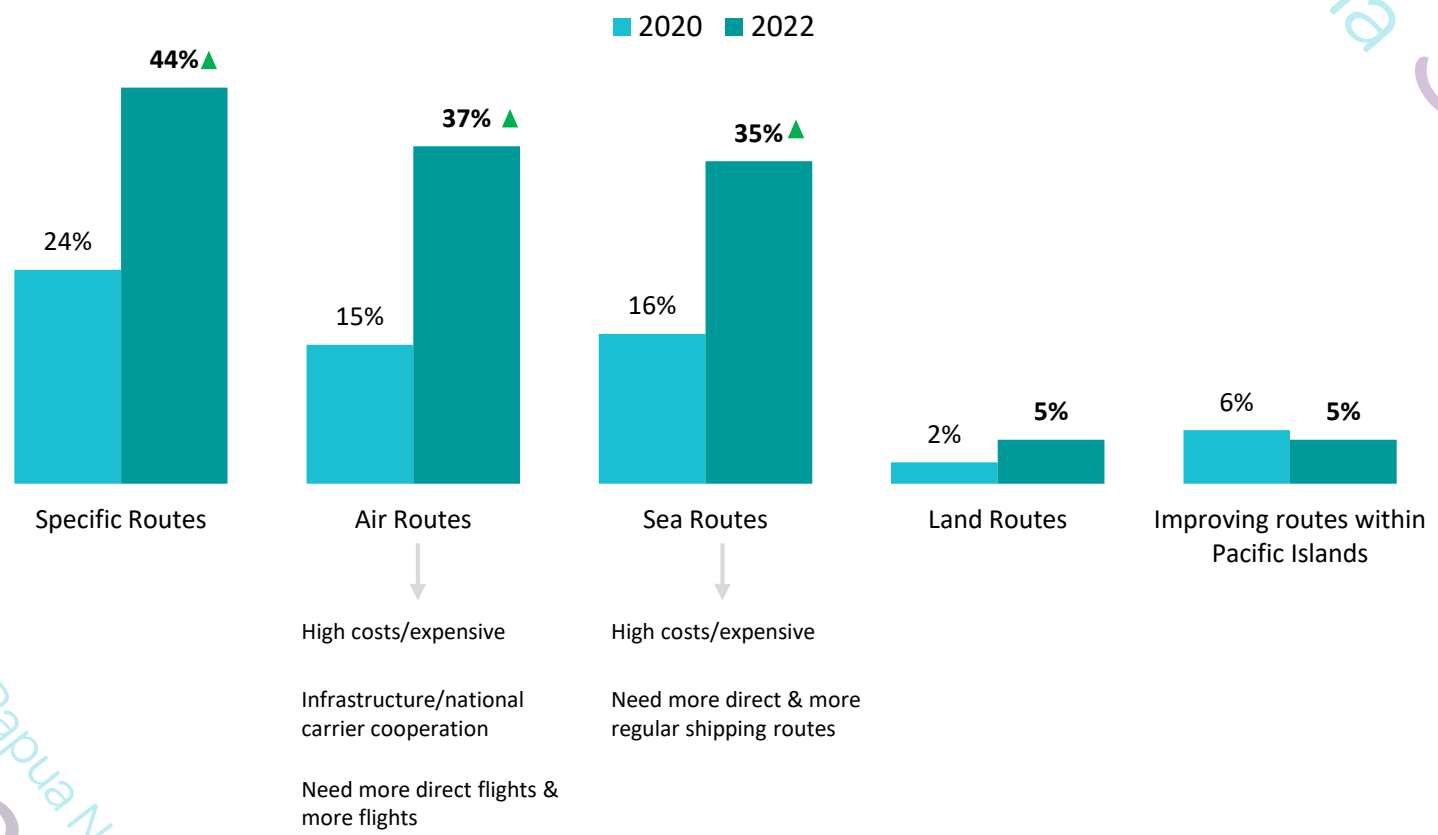
▲▼ New sig. higher/lower than Mature (95% CI)

# ASSISTANCE NEEDED FOR IMPROVING TRANSPORT/ SHIPPING ROUTES

Exporters are increasingly calling for assistance across specific air, sea and land routes.



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



▲▼ Sig. higher/lower than 2020 (95% CI)

# IMPROVING TRANSPORT/ SHIPPING ROUTES

Calls for assistance with specific routes predominantly include direct options to destinations within the Pacific Islands, Australia and New Zealand.

## SPECIFIC ROUTES

"Shipping to Asia. Limited options at the moment, very expensive and some lines don't take any freight out."

**(Vanuatu, Other)**

"Shipping Inwards - NZ and Australia. Outgoing - Tonga/Samoa/Vanuatu/ New Caledonia."

**(Fiji Islands, Manufacturing)**

"We are exporting from Fiji to all Pacific Island countries via sea and air. We are also exporting direct shipment from Asian countries to all PIC, including New Zealand, via sea freight or air freight."

**(Fiji Islands, Manufacturing)**

## SEA & AIR ROUTES

"Sea freight Tarawa, Kiribati to Australia, then GST payable, Australia the high costs of transport we have to pay GST into Australia on our disadvantaged high freight costs."

**(Kiribati, Other)**

"There could be a bonded warehouse for Pacific goods or trade exceptions and grants to help with the high cost of freight."

**(Cook Islands, Manufacturing)**

"Sea freight and air freight route from Tonga to Sydney, Australia."

**(Tonga, Agriculture)**

"Shipping routes to Asia particularly Korea. Assistance is needed to minimize time taken for produce to be shipped from Tonga to Korea. Changes to vessel routes in short-notice affect quality and time delivery of our orders which is a huge cost to our company. We are at the mercy of shipping companies."

**(Tonga, Agriculture)**

"Exporting to Europe by sea is quite challenging, no direct route so it increases the cost of freight. And by air, expensive and limited in quantity."

**(Vanuatu, Manufacturing)**

"Solomons need direct flight from Brisbane, re establish to Munda with grant subsidy for the next two to three years to get the route off the ground to assist the operators."

**(Solomon Islands, Tourism)**

# FINANCE & INVESTMENT



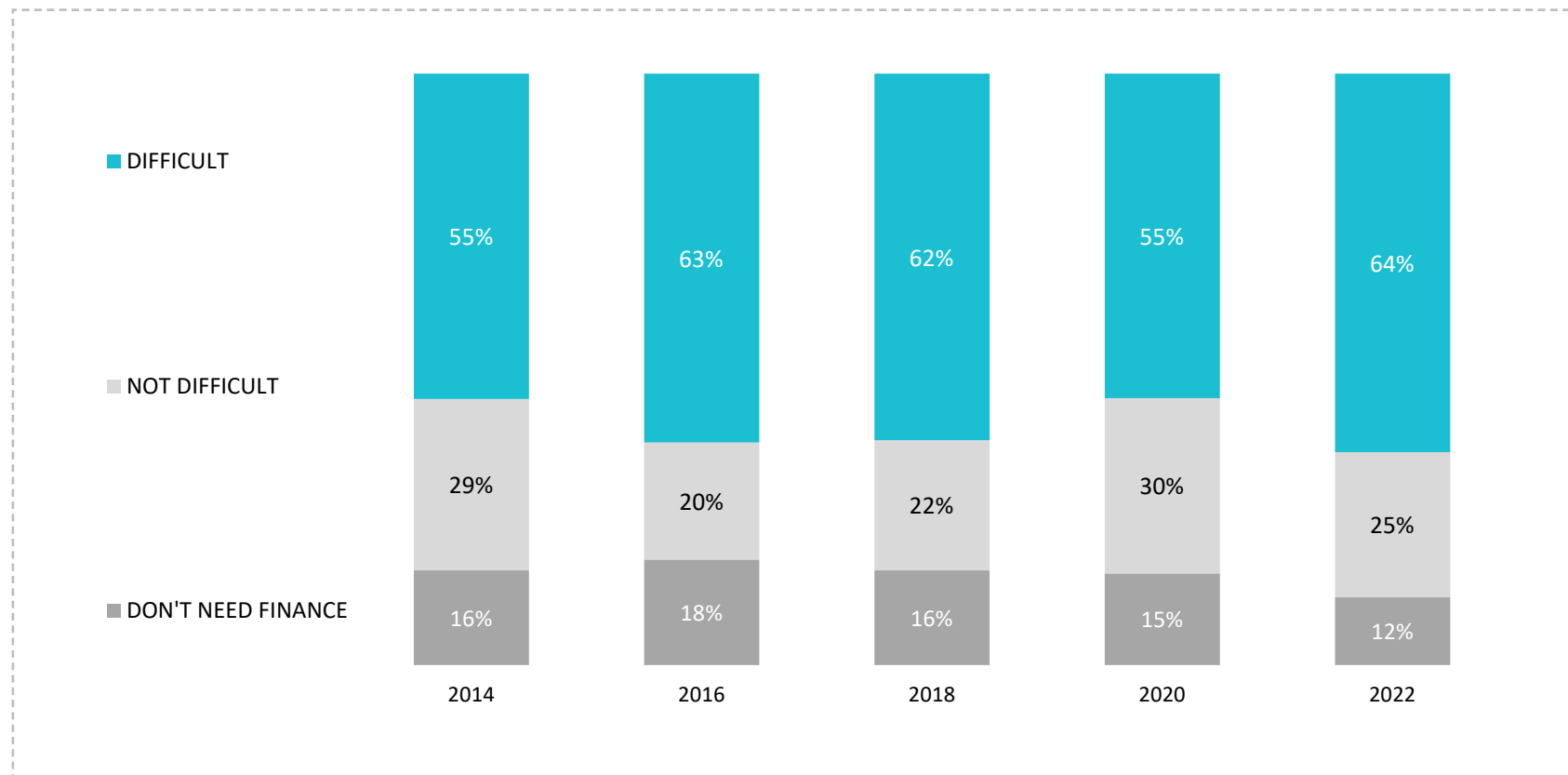


# DIFFICULTY OBTAINING FINANCE

Access to finance has increasingly become a barrier in 2022, with over three out of five exporters now finding it difficult to obtain finance.

Q

IS IT DIFFICULT FOR YOUR BUSINESS TO OBTAIN FINANCE?

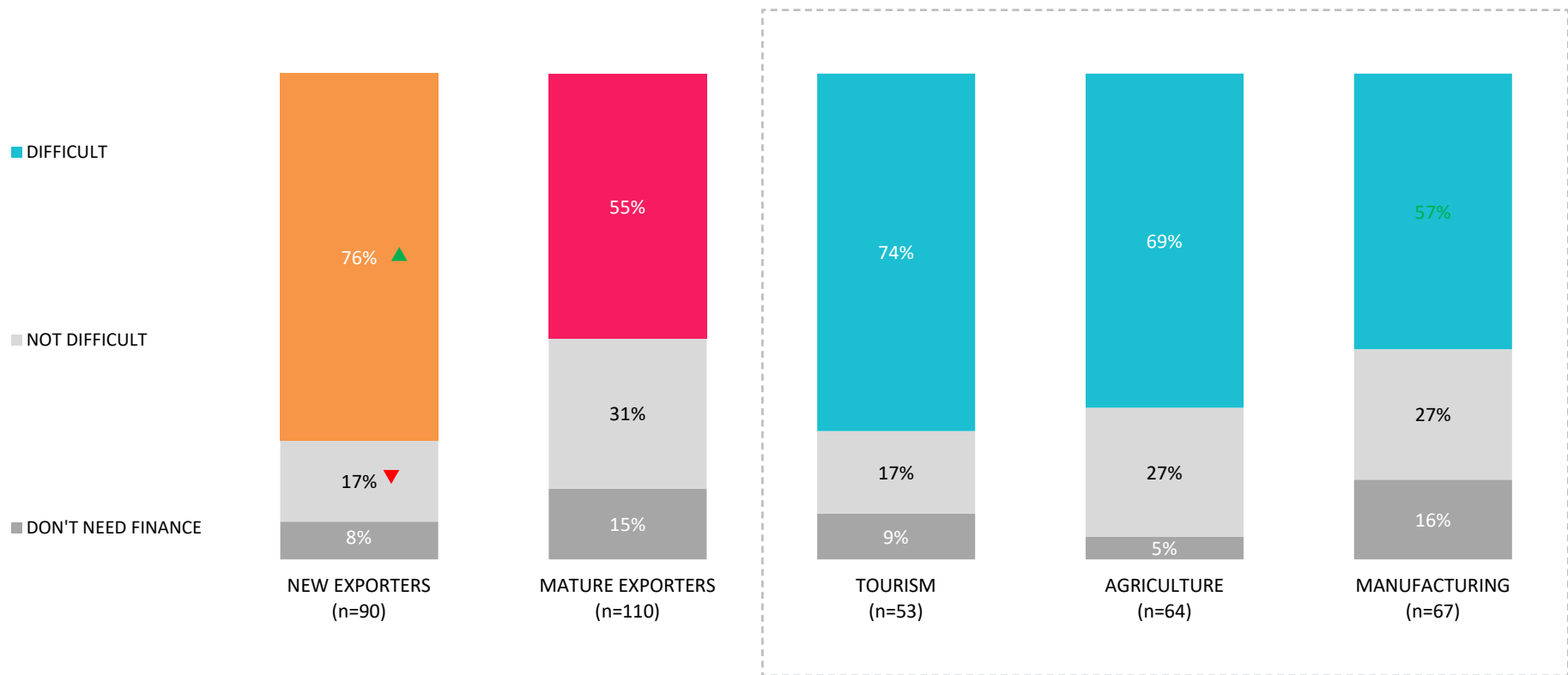


# DIFFICULTY OBTAINING FINANCE

Access to finance is difficult across most sectors but particularly for new exporters and those in Tourism. While access to finance appears less difficult for those within Manufacturing, this figure has notably increased since 2020.

Q

IS IT DIFFICULT FOR YOUR BUSINESS TO OBTAIN FINANCE?



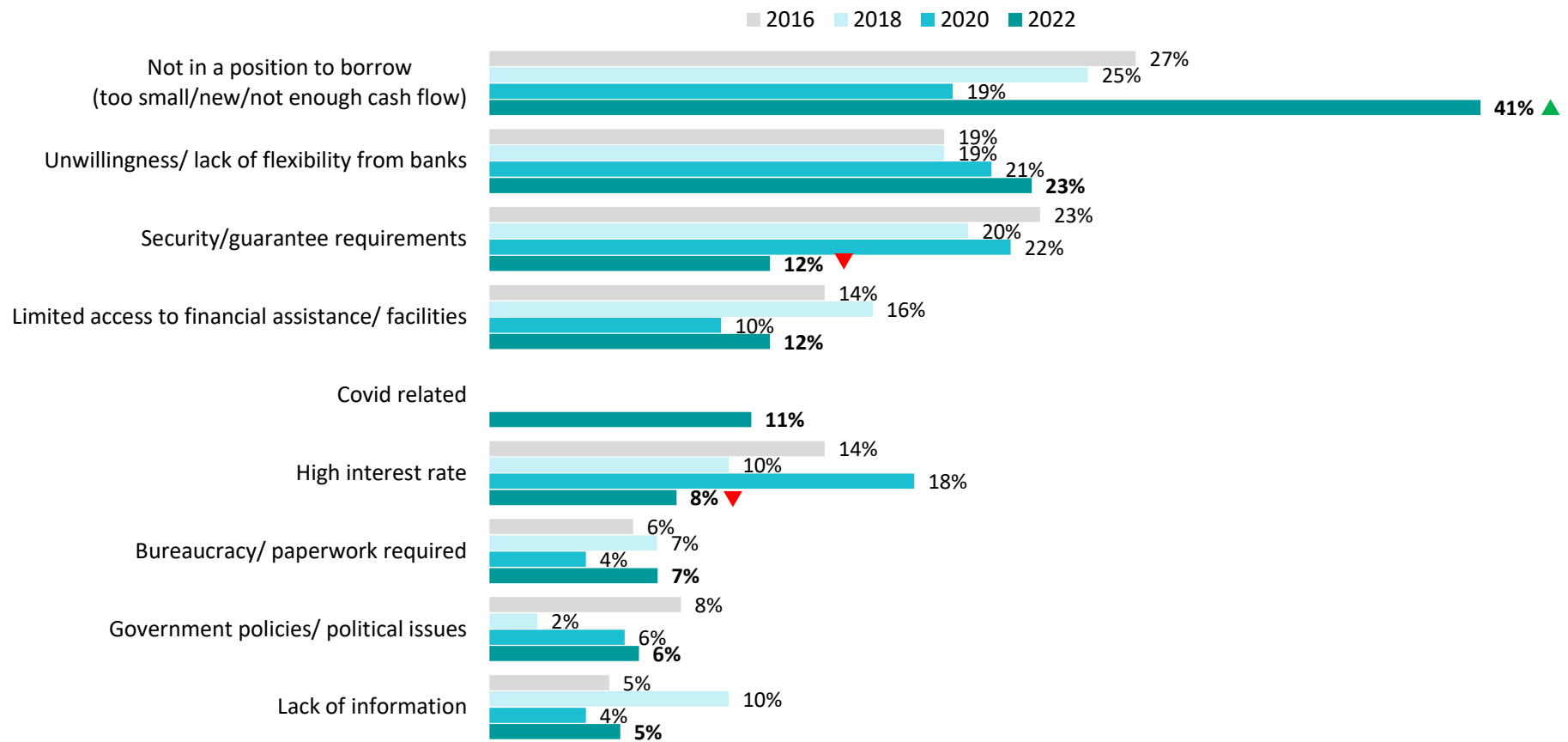
▲ ▼ New Sig. higher/lower than Mature (95% CI)

# REASONS FOR DIFFICULTY ACCESSING FINANCE

Not being in a position to borrow and the lack of flexibility from banks are increasingly reported as reasons exporters find it difficult to obtain finance.

Q

WHY DO YOU FIND IT DIFFICULT TO OBTAIN FINANCE?



▲ ▼ Sig. higher/lower than 2020 (95% CI)

# REASONS FOR DIFFICULTY ACCESSING FINANCE

## NOT IN A POSITION TO BORROW

“My business is classified as an SME and, being only two years in the game, it is very difficult to approach financial institutions to provide assistance.”

**(Fiji Islands, Agriculture)**

“As banks only look at current financial capacity and last 12 months’ financials, we were closed for 18 months to 2 years.”

**(Fiji Islands, Fisheries)**

## SECURITY/GUARANTTEE REASONS

“I do not have any securities to support the finance. My business is fairly new, we started operations in November 2021.”

**(Fiji Islands, Agriculture)**

“Many institutions have declined my requests due to lack of assets.”

**(Fiji Islands, Tourism)**

“Not enough guarantees. No assets. Too much credit already exists, or current company assets all tied up with loans.”

**(Samoa, Manufacturing)**

## UNWILLINGNESS/LACK OF FLEXIBILITY FROM BANKS

“Financial institutions were cautious to provide financial facilities during COVID.”

**(Fiji Islands, Agriculture)**

“Banks unfairly feel that we won’t be able to pay back the loan. The nature of the business; investors unlikely to invest in small business.”

**(Tonga, Agriculture)**

“Because Tourism policy in PNG MTDS Plan 2020 - 2050 is not featured in Tourism so we are not covered if any disaster happens. Finance companies do not believe in Tourism operators here in PNG.”

**(Papua New Guinea)**

## LIMITED ACCESS TO FINANCE ASSISTANCE/FACILITIES

“Loan process with commercial banks in PNG very complex and tedious compounded with very high interest rates.”

**(Papua New Guinea, Fisheries)**

“Lack of funding available for exporters of agriculture goods. The requirements and qualifications for financing are too high that mid- to low-level exporters have a hard time meeting them.”

**(Samoa, Agriculture)**

## COVID-19 RELATED

“Because the borders are closed and there are not many local people who buy from us anymore.”

**(Samoa, Creative Arts)**

“Because lack of tourist or overseas visitors coming into my country due to COVID-19 pandemic.”

**(Samoa, Creative Arts)**

Q

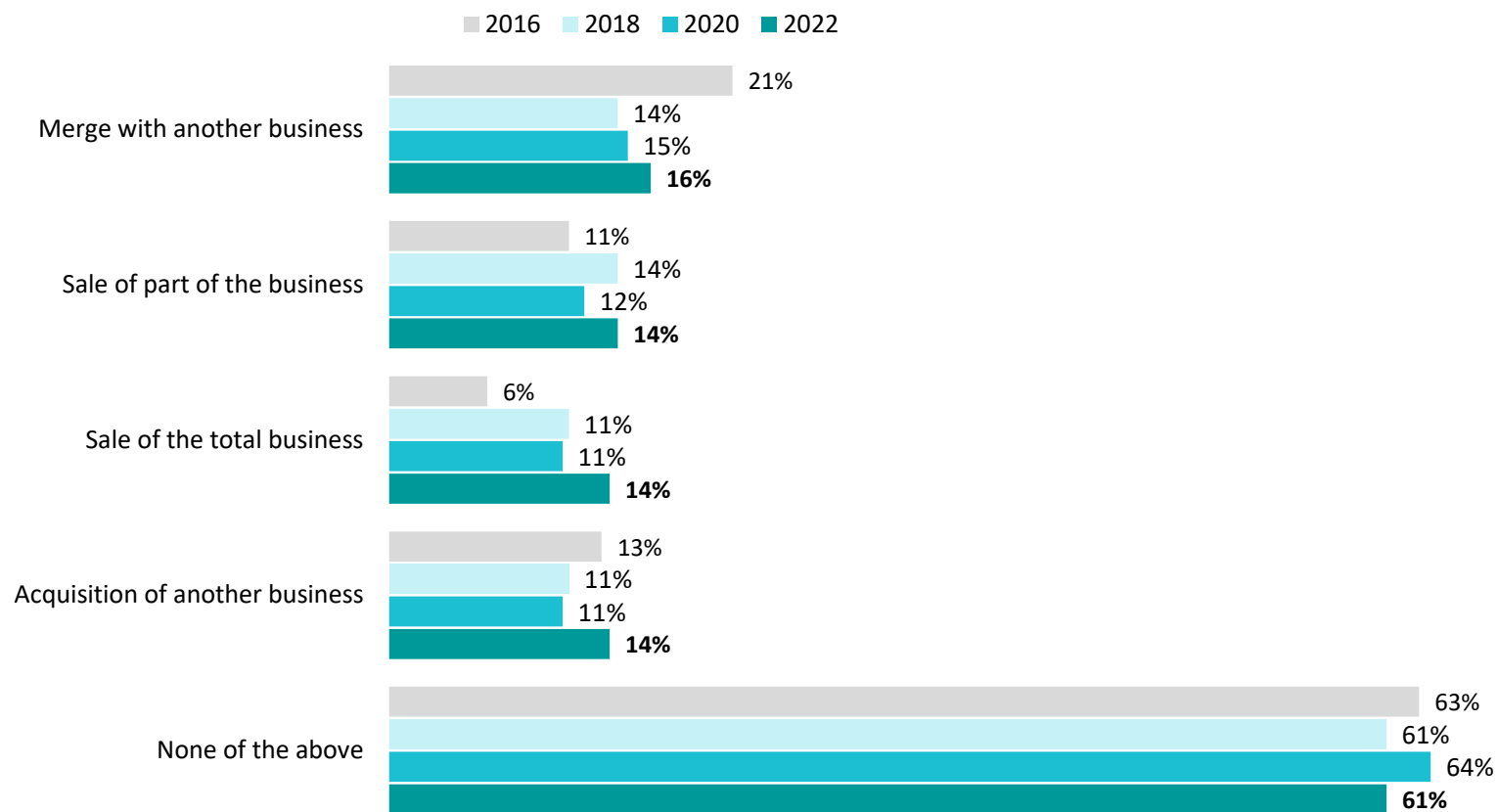
WHY DO YOU FIND IT DIFFICULT TO OBTAIN FINANCE?

# CONSIDERATION OF SELLING BUSINESS OR SEEKING INVESTMENT

In line with previous surveys, most exporters are not looking to change their current business ownership situation.

Q

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

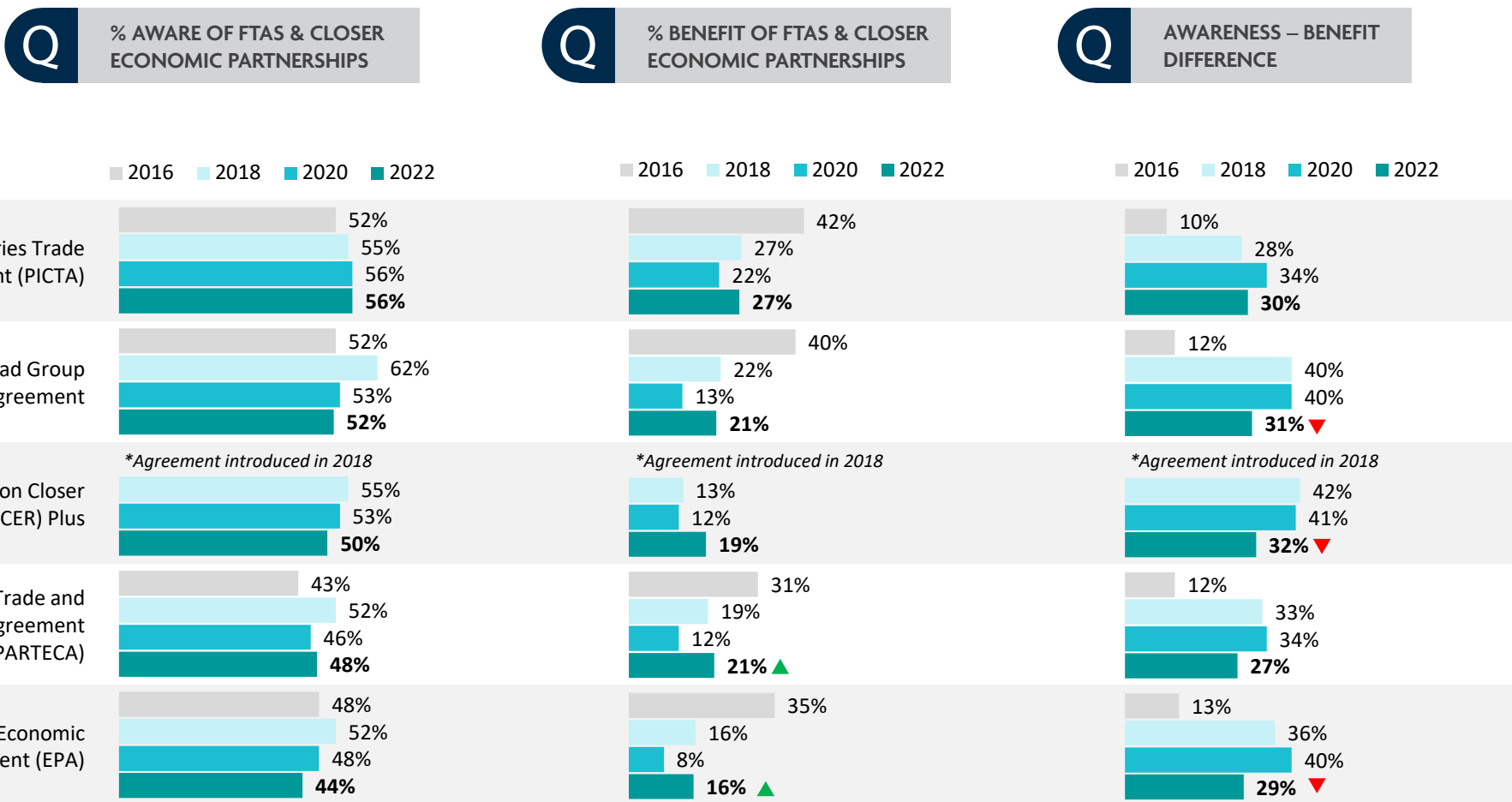


An aerial photograph of a dense, vibrant green forest. A winding river or stream flows through the center of the forest, reflecting the sky. The trees are in various shades of green, and there is a soft mist or fog hanging in the air, particularly near the water and in the lower parts of the forest. The overall scene is peaceful and natural.

# FREE TRADE & ECONOMIC AGREEMENTS

# AWARENESS & BENEFIT OF FTAS & CLOSER ECONOMIC PARTNERSHIPS

Level of awareness of free trade agreements (FTAs) remains consistent with previous surveys; however, the perceived benefit has improved since 2020.



▲ ▼ Sig. higher/lower than 2020 (95% CI)

# AWARENESS OF FTAS & CLOSER ECONOMIC PARTNERSHIPS - BY INDUSTRY AND EXPORT MATURITY

Awareness of FTAs is highest in the Manufacturing sector and mature businesses.

## Q AWARENESS OF FREE TRADE AGREEMENTS AND CLOSER ECONOMIC PARTNERSHIPS

■ 2022

		EXPORT AREA			EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	NEW EXPORTERS	MATURE EXPORTERS
		<i>n=64</i>	<i>n=67</i>	<i>n=53</i>	<i>n=90</i>	<i>n=110</i>
Pacific Island Countries Trade Agreement (PICTA)	56%	56%	63%	45%	49%	62%
1994 Melanesian Spearhead Group (MSG) Trade Agreement	52%	56%	52%	49%	44%	57%
2017 Pacific Agreement on Closer Economic Relations (PACER) Plus	50%	56%	52%	43%	46%	54%
1981 South Pacific Regional Trade and Economic Cooperation Agreement (SPARTECA)	48%	47%	54%	42%	38% ▼	55%
The European Union Economic Partnership Agreement (EPA)	44%	48%	42%	40%	36% ▼	51%

▲ ▼ New sig. higher/lower than Mature (95% CI)



# BENEFIT OF FTAS & CLOSER ECONOMIC PARTNERSHIPS - BY INDUSTRY AND EXPORT MATURITY

Perceived benefits of FTAs and closer economic partnerships is highest among Agriculture sector businesses.

**Q** DO YOU BENEFIT FROM ANY OF THE FOLLOWING FREE TRADE AGREEMENTS AND CLOSER ECONOMIC PARTNERSHIPS?

	2022	EXPORT AREA			EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
		n=64	n=67	n=53	n=90	n=110
Pacific Island Countries Trade Agreement (PICTA)	27%	30%	28%	15%	26%	27%
1994 Melanesian Spearhead Group (MSG) Trade Agreement	21%	27%	24%	11%	18%	24%
2017 Pacific Agreement on Closer Economic Relations (PACER) Plus	19%	20%	24%	9%	19%	18%
1981 South Pacific Regional Trade and Economic Cooperation Agreement (SPARTECA)	21%	22%	25%	11%	13% ▼	26%
The European Union Economic Partnership Agreement (EPA)	16%	23%	15%	6%	10%	20%

▲ ▼ New sig. higher/lower than Mature (95% CI)

## RESEARCH METHODOLOGY

### WHO RESPONDED

A total of 200 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 2022 by Fifth Quadrant.

## ABOUT PACIFIC TRADE INVEST AUSTRALIA

### ABOUT US

As the Pacific's leading trade and investment promotion agency, PTI Australia develops and promotes businesses and people from the Pacific through trade, investment, tourism, and labour mobility. Our vision is to improve the livelihoods of Pacific people by enabling decent work and economic growth in the Blue Pacific.

PTI Australia is an agency of Pacific Islands Forum Secretariat funded by Australia's Department of Foreign Affairs and Trade.

## ACKNOWLEDGEMENTS & DISCLAIMER

### ACKNOWLEDGEMENTS

PTI Australia and survey partners would like to thank the Pacific export companies that took part in the survey and our on-the-ground partners that 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 2022.



Pacific  
Trade Invest  
AUSTRALIA

