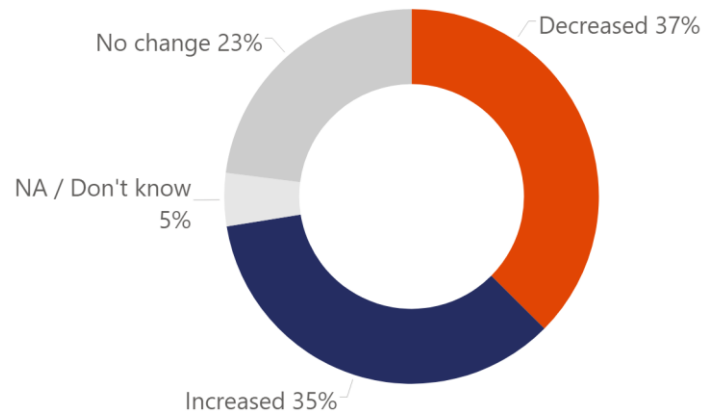


Services Exporter Survey – Key Findings

The aim of this survey is to assess the key non-tariff rules and regulations services exporters face in providing and expanding their exports to specific markets, and to examine the impact of COVID-19 on service exporters.

IMPACT OF COVID-19

Nearly **three quarters** of the 79 respondents reported that **COVID-19 impacted exporting activity**. Around half of those impacted saw export activity increase, while half experienced decline.¹



WHY DID EXPORT ACTIVITY CHANGE?

INCREASE ↑

- More consumer demand (i.e. changes in demand during lockdown, e.g. more gaming)
- Innovation and digitalisation has allowed flexibility to work from home
- Critical/government funded services

DECLINE ↓

- Constraints with travel/border restrictions
- Large capital projects on hold/business slowed/closed during lockdown

44%

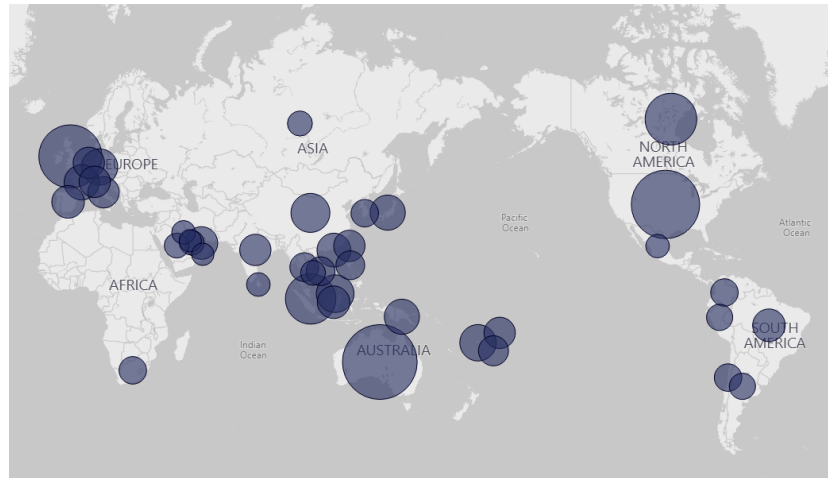
of exporters had their **service delivery impacted** by COVID-19. **Education services** were hit hard with **82%** of them experiencing service delivery changes.²

95%

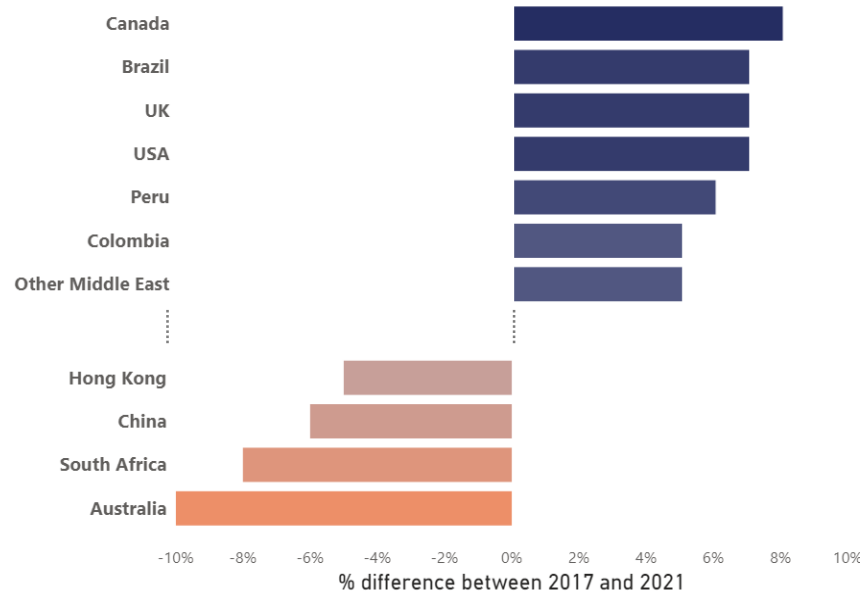
of those impacted cited **travel restrictions** as the main change, using **virtual means** to communicate with clients. Around 5% sent people **offshore for longer**.

MARKET CHANGE 2017-2021

In 2021, respondents exported, planned to export or have exported to **50 markets** around the world. Nearly a **third** of respondents said they use **multi-country online platforms** to export their services.



The **proportion of respondents exporting to Canada, Brazil, the UK, USA, Peru, Columbia and 'other Middle East' countries grew by 5% or more** between the 2017 and 2021 surveys. The **proportion exporting to Australia fell by 10%**.

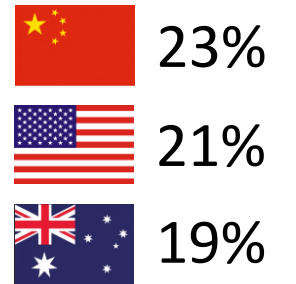


BARRIERS AND SUPPORT

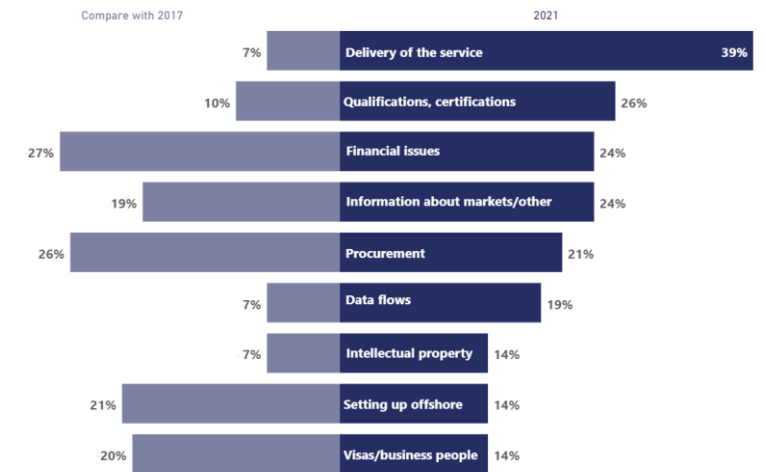
54%

of exporters surveyed in 2021 identified at least one market that **presented barriers** or had a **negative impact** on their ability to sell services. Around 34% reported no significant barriers.

Of those exporting to the following countries, these are the percentages of exporters that ranked China, Australia or USA as markets that presented the biggest barriers.³



TYPES OF BARRIERS FACED⁴



In COVID-impacted 2021, **23% of responses** said **delivery of service** was the **highest priority barrier** to address, compared with 4% in 2017. Businesses were also keen to see MFAT assistance with **Information about markets**. 29% of responses cited it as a high priority, up from 18% in 2017.

2017

Procurement
Financial issues
Information about markets
Visas and business people
Setting up offshore
Delivery of the service

2021

Information about markets
Delivery of the service
Visas and business people
Setting up offshore
Financial issues
Procurement

ABOUT

This dashboard contains key findings from the 2017 and 2021 Services Exporter Surveys. A total of 79 New Zealand businesses participated in the survey in 2021, and 149 in 2017. The survey was open to all service exporters that were currently exporting, had exported in the last five years, or were planning to export services to an offshore market.

The survey findings identified changes in the export environment, with the impact of COVID-19 being a key theme throughout. Respondents identified the biggest barriers they faced when exporting and further highlighted ways in which MFAT could support their business.

The results of this survey will help inform MFAT's ongoing work in engaging and collaborating with New Zealand exporters and supporting overall export growth.

DATA SOURCES

- 2017 Service Exporter Survey (data provided by Neilson)
- 2021 Service Exporter Survey (data provided by Neilson)

DATA QUALITY AND LIMITATIONS

There are limitations to the survey data used to compile this analysis. As there were only 79 respondents for the 2021 survey, it cannot be assumed that the findings are representative of all New Zealand service exporters. It should also be noted that respondents engaged on an opt-in basis and therefore there is potential for selection bias.

MORE INFORMATION

If you have any questions about the survey, the methodology or the findings please contact TPND's Services Investment and Digital Unit at serviceexports@mfat.govt.nz.

FOOTNOTES

- The question asked was 'What impact has the COVID pandemic (since early 2020) had on your exporting or planned exporting activities to overseas markets?'. The results are broken down in more detail below:

Answer	#	%
Decreased a lot	19	25%
Decreased a little	13	17%
No real change	17	23%
Increased a little	15	20%
Increased a lot	8	11%
NA/Don't know	3	4%

- This analysis only considers exporters who are currently or have previously exported (75 of the total 79 respondents).

- Responding businesses were asked to identify which of the markets to which they are currently exporting, planning or have previously exported, present the most severe barriers and obstacles to their business.

They were asked to rank up to five markets which present the most severe barriers or have the most negative impact on their ability to sell services internationally, with the option to indicate if they do not face any significant barriers.

- This chart shows the percentage of responses which identified a particular barrier. An individual exporter could identify a barrier more than once (in different markets), or multiple different barriers in one market.

For data analysts

- [Data modelling](#)
- [2017 Report Data Tables](#)
- [2021 Report Data Tables](#)
- [Visualisation production](#)