



# DHL EXPORT BAROMETER 2022

Exploring the growth strategies and driving forces powering Australian export businesses since 2003.

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# ABOUT THE DHL EXPORT BAROMETER

Since 2003, the DHL Export Barometer has been generating reliable and independent industry insights for Australian exporters, helping examine the issues impacting businesses each year, from emerging trends to significant evolving challenges in domestic and international markets.

Conducted by ACA Research, the DHL Export Barometer 2022 surveyed 948 Australian businesses online between 31 August and 21 September this year.

Participating exporters were selected from the databases of DHL Express Australia and invited to participate.

## LOCATION OF BUSINESS

NSW/ACT **36%**  
 VIC/TAS **34%**  
 QLD **18%**  
 WA **7%**  
 SA/NT **5%**



## BUSINESS SIZE

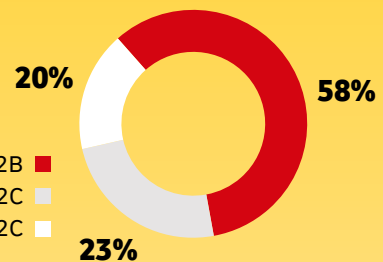
**SOHO** (1 to 4) **31%**  
**Small Business** (5 to 19) **34%**  
**Medium Business** (20 to 99) **23%**  
**Large Business** (100+) **12%**

By number of full-time employees

## EXPORTING TENURE

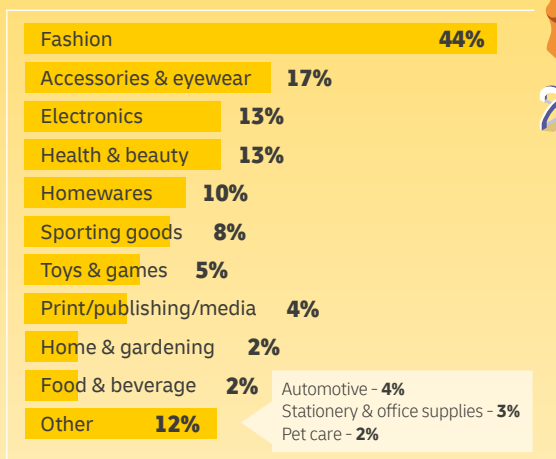
**5 years or less** **31%**  
55% are SOHO  
**6 - 20 years** **41%**  
**Over 20 years** **28%**

## TYPE OF BUSINESS

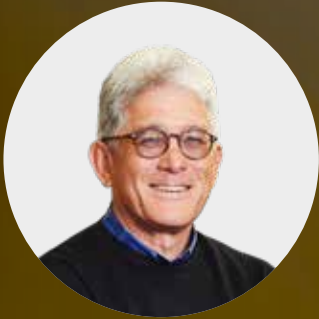


## EXPORT INDUSTRY

**Consumer goods** **43%**  
**Manufacturing** **26%**  
**Services** **21%**  
**Mining** **5%**  
**Agriculture** **5%**



# FOREWORD



Across the globe, the past two years have shown us the true interconnectedness of supply chains and how reliant we are on the continuing free flow of trade.

During the COVID-19 pandemic, Australian trade has been impacted by a number of factors: the closure of the country's international borders, shortages in commercial air cargo capacity, and lockdowns affecting domestic and overseas manufacturing and transport hubs.

On top of this, inflation, trade tariffs, exchange rates, natural disasters, and overseas conflicts have contributed to rising operating costs, impacting raw materials and services, energy and fuel, transport and freight, wages and labour, and the cost of finance – adding further pressure on Australian businesses.

With these forces at play, how are Australian businesses faring? And what does the current environment mean for international trade prospects? The DHL Export Barometer 2022, based on the survey of 948 Australian businesses, explores this and provides a broad look into the trade sentiments of businesses engaging in the importing and exporting of goods and services.

While external economic factors, the lingering impact of the pandemic and softening e-commerce demand have had an effect, it is encouraging to see Australia's export industry has skilfully navigated through to calmer water. This year, 70% of Australian businesses predict an increase in export revenue over the coming 12 months – this is up 1% on last year, and the second highest recorded level of exporter confidence since the Barometer started annual records in 2003.

With a number of free trade agreements (FTAs) ratified since 2020 – including the Australia-Hong Kong Free Trade Agreement (A-HKFTA) and associated Investment Agreement (IA), Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA), Pacific Agreement on Closer Economic Relations (PACER) Plus, and the Regional Comprehensive Economic Partnership Agreement (RCEP) – trade barriers are easing and 79% of businesses are now taking advantage of the benefits of FTAs.

To mitigate supply chain risks, businesses have also turned to diversifying their operations in a number of ways – sourcing from multiple suppliers, increasing stock levels, sourcing raw materials from alternative markets, and manufacturing domestically are among the strategies. Attesting to the benefits of diversification, businesses that implemented such measures are more likely to report an expected increase in revenue.

***This year marks DHL Express' 50th year of operations in Australia. Since our establishment in 1972 in Mascot, Sydney, our business has witnessed over decades the ebb and flow of trade cycles, and the ability of both small and large-sized businesses to adapt. Remaining confident and armed with new strategies to fortify their supply chains and pursue new market opportunities, Australian businesses show they are prepared to tackle the year ahead.***

In this year's edition, we hope you find some helpful insights into how Australian businesses plan to navigate the global export market and that these will be useful to inform your trade strategy for 2023.

**GARY EDSTEIN**

CEO and Senior Vice President  
DHL Express Australia and Papua New Guinea

## EXECUTIVE SUMMARY

# EXPORTERS CONTINUE TO 'SHAKE IT OFF'

***After the challenges of COVID-19 in 2020-21, exporters continue to consolidate and expand trade in global markets.***

That's the key finding of the DHL Export Barometer 2022, which surveyed 948 export businesses through August to September.

In terms of exporter confidence, 70% of businesses anticipate an increase in orders over the next 12 months. 25% expect the same levels, and just 5% see a decrease on the horizon. 70% is slightly up on the 69% recorded in 2021, and well above the 63% mark which is the average of all surveys conducted between 2003 and 2022.

After falling in 2020, export orders are on the up with the proportion of businesses reporting an increase in line with pre-pandemic results. However, a large number of firms are also experiencing a fall in orders as they continue to recover.

The strongest regions for export confidence are QLD and WA, along with SA/NT. In terms of industries, consumer goods lead the way followed by manufacturing, services, mining and agriculture. The increase in exporters of consumer goods seen in 2021 has stabilised in 2022. While fewer are exporting food and beverages, a larger proportion are exporting fashion goods, accessories and eyewear.

What are some of the challenges? It's mainly supply chain-related and most exporters have diversified their supply chain sources in response, including sourcing from multiple suppliers and alternative markets.

New Zealand and China stand out as areas for export growth, whilst the proportion exporting to North America is also growing year-on-year. Nearly half of the exporters' surveyed plan to target new

markets over the next 12 months – North America, Europe and New Zealand are the most commonly mentioned, but South-East Asia and South and Central America are also on the radar. Again, it's mainly consumer goods exporters most likely to target new markets, while agricultural exporters are the most likely to be targeting new markets in North-East Asia (14% aim to expand into China).

Exporters' expansion has been assisted by free trade agreements (FTAs), especially the pacts with ASEAN and New Zealand (AANZFTA), China (ChAFTA) and the USA (AUSFTA). Almost 80% of exporters consider FTAs to be important, with 44% citing them as very important to their trade. But there is a lack of awareness too – for example, a quarter of those exporting to North America are unaware of AUSFTA, showing room for improving industry knowledge.

In terms of e-commerce, nearly 80% of businesses continue to use online channels, especially small to medium-sized enterprises. Social media usage is slightly down on its 2021 peak, but social platform Facebook and website builder Shopify continue to enjoy popularity.

In conclusion, it has been a year of consolidation for exporters, retaining the gains of the 2021 recovery and shaking off the effects of the pandemic. The willingness to expand into new markets, release new products and spend on marketing denotes a sign of cautious optimism amongst exporters after a rocky couple of years.



## PROFESSOR TIM HARCOURT

Industry Professor and Chief Economist at Institute for Public Policy and Governance (IPPG), University of Technology Sydney (UTS).

Harcourt was Chief Economist at Austrade when the DHL Export Barometer was launched as a collaboration in 2003.

## KEY TAKEAWAYS

**WHAT YOU NEED TO KNOW****CONFIDENCE****70%**

Most Australian exporters are optimistic about the year ahead and expect revenues to increase

**2<sup>nd</sup>**

Confidence levels are at the 2<sup>nd</sup> highest point ever recorded



More than half (52%) will expand their workforce



Small businesses are the most optimistic, but larger companies have seen the biggest jump in confidence since last year



Almost half plan to expand delivery into new international markets

**3/4**

of traders plan to increase wages in 2022

**NEW MARKETS****New Zealand**

is again the most popular export destination



Shipping to North America and Europe is rising, especially among SOHOs and medium-sized businesses



Exporters continue to encounter export challenges with rising freight costs, supply chain issues and inflation top concerns in 2022



Australian businesses are responding to supply chain disruptions by diversifying, and these companies are more likely to predict revenue increases



Two-way trade is on the up, with 88% of Australian export businesses bringing in imports



China, North America, and Europe are the largest import markets

## KEY TAKEAWAYS

# WHAT YOU NEED TO KNOW

## FREE TRADE AGREEMENTS (FTAS)



Agreements are essential to 79% of Australian exporters



Three trade deals stand out in particular: AANZFTA, ChAFTA and AUSFTA



There is a lack of awareness about FTAs and their role in increased revenue

## E-COMMERCE

# 79%

of businesses generate orders through online channels



Online orders are rising, with 47% of exporters reporting a rise in the past 12 months



Businesses are getting more efficient at generating orders, with a drop in businesses using paid online promotions



Social media remains popular, yet the use of most channels has dropped since 2021



EXPORTER CONFIDENCE

# EXPORTER CONFIDENCE RIDING HIGH

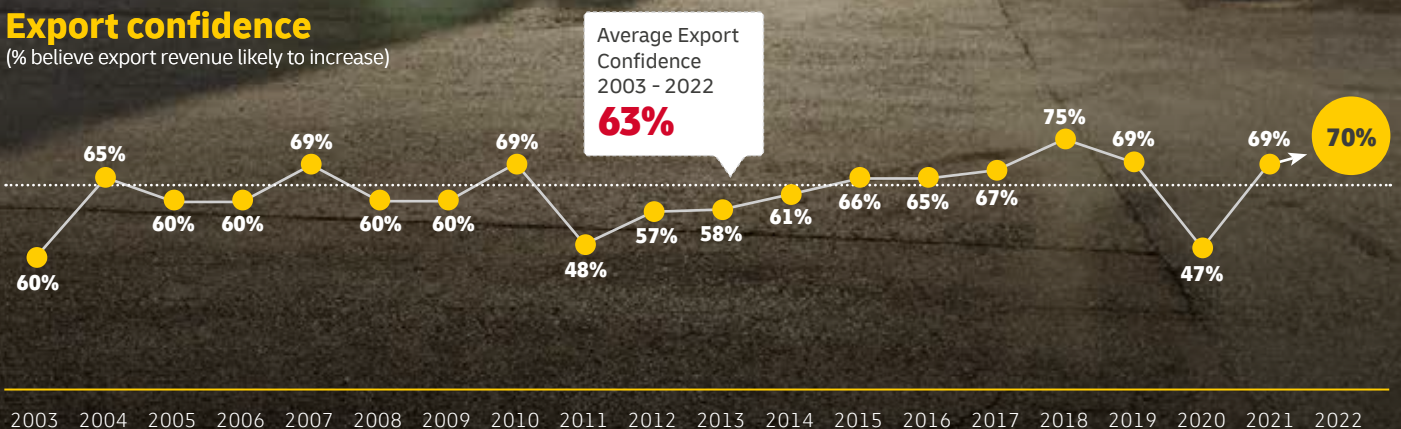
**Global trade is in fine form and Australian exporters are gearing up for another prosperous year.**

The 20<sup>th</sup> edition of the DHL Export Barometer shows that 70% of Aussie traders expect sales to increase in the coming 12 months.

That puts current confidence levels at the second-highest point during the past two decades and tracks well above the 20-year average of 63%.

It's a far cry from 2020, when the impact of the global pandemic resulted in confidence plummeting to a record low of 47%, and with only 1 in 20 exporters flagging potential revenue decreases, the bounce-back of the sector has exporters looking ahead with renewed confidence.

**Export confidence**  
(% believe export revenue likely to increase)





EXPORTER CONFIDENCE

# BUSINESS ON THE RISE

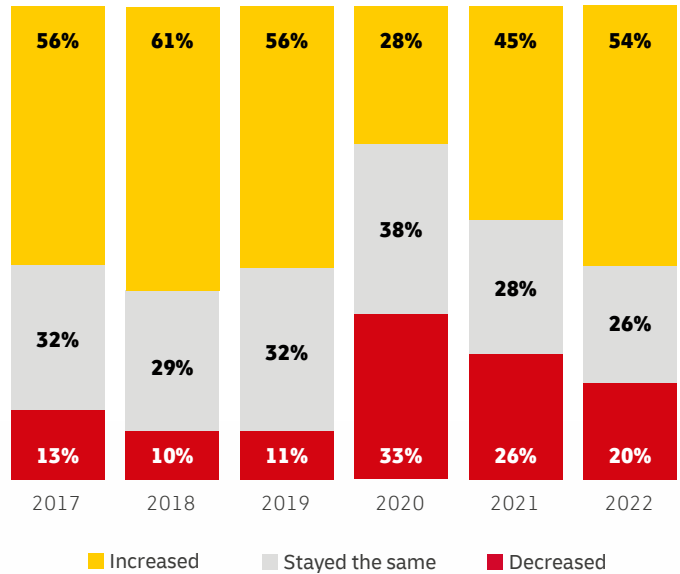
Looking at the actual export orders over the past 12 months, the data definitively supports the narrative that in the post-pandemic market things are looking up for the majority.

One in two businesses (54%) reported an increase in orders during the past year – a considerable jump from 28% in 2020 and 45% in 2021. A further 26% report orders stayed the same.

At the opposite end of the spectrum, 20% of exporters reported a drop in orders during the past year. This figure remains substantially higher than the period from 2017 to 2019, suggesting business for some industry players is yet to return to pre-pandemic levels.

## Export performance

Change in export orders over the past twelve months



# SOME STATES MORE CONFIDENT THAN OTHERS

## By location of business

WA	77%	↑ 12%
QLD	77%	↑ 4%
SA/NT	73%	↑ 15%
VIC/TAS	68%	↓ 1%
NSW/ACT	66%	↓ 3%

The data also shows that the level of positive sentiment differs between locations, with exporters in some areas noticeably more confident than others.

Leading the pack, 77% of WA and QLD predicted revenue gains this year, while confidence in VIC/TAS and NSW remains slightly lower.

There has been a substantial increase in confidence in WA – up 12% from 65%.

In both QLD and SA/NT confidence jumped 5%, putting confidence on par with 2019 and 2020.

Meanwhile, in VIC/TAS the number of businesses predicting revenue to increase has taken a small hit, dropping 1% from last year to 68%. In NSW, confidence fell from 69% to 66%.

EXPORTER CONFIDENCE

# SMALL BUSINESS LEADS MORALE

The Barometer shows overall optimism is high, but undeniably smaller-sized businesses have higher expectations for the year ahead.

Seven out of 10 (73%) small office home office (SOHO) ventures report an expected increase in revenue. This is matched by 70% of small businesses.

In comparison, 66% of medium-sized companies felt the same.

Of note is the jump in optimism among large export businesses. Their level of confidence has shown a significant uptick in the past two years.

In this year's data the proportion of large exporters predicting a stronger path ahead hit 67% – up from 58% in 2021 and 48% in 2020 – and is now tracking well above pre-pandemic levels.

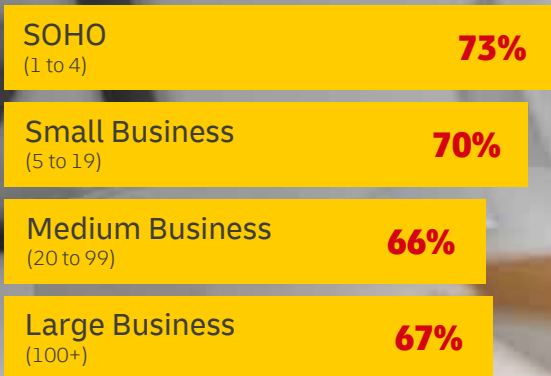
How long a business has been in operation also had an impact on morale.

Newcomers to the export industry appear more hopeful with 77% of the businesses operating for under five years, forecasting revenue to increase.

Comparatively, only 65% of the businesses involved in exporting for more than 20 years were predicting a good year ahead.

## Business size

By number of full-time employees



## By exporting tenure



## FACTORS DRIVING DEMAND

# EXPORTERS TRY NEW APPROACHES FOR BETTER RESULTS

For the Australian exporters expecting gains this year a combination of growth strategies and external factors are at play.

Firstly, many companies (60%) will actively drive demand by increasing sales and marketing activity and five out of 10 (52%) predict increased demand from new and existing customers.

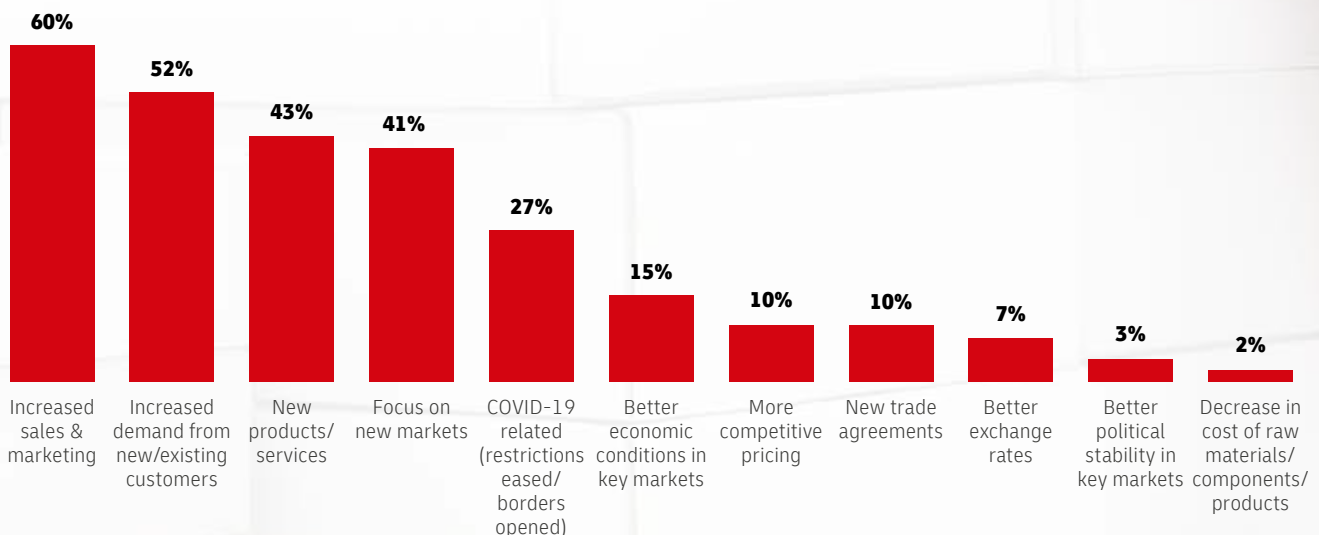
Many companies are taking a proactive approach to improve order numbers by introducing new products and services (43%) and focusing on new markets (41%).

Notably, external factors are considered less influential by many operators this year but are still having some positive impacts.

More than one-quarter of businesses (27%) will see their revenue rise as a result of COVID-19 restrictions being relaxed and the flow across borders becoming easier.

Additionally, 15% of exporters predict gains from better economic conditions, and 7% will benefit from exchange rates.

## Reasons for export revenue increase



FACTORS DRIVING DEMAND

# FACTORS DRIVING DEMAND DOWN



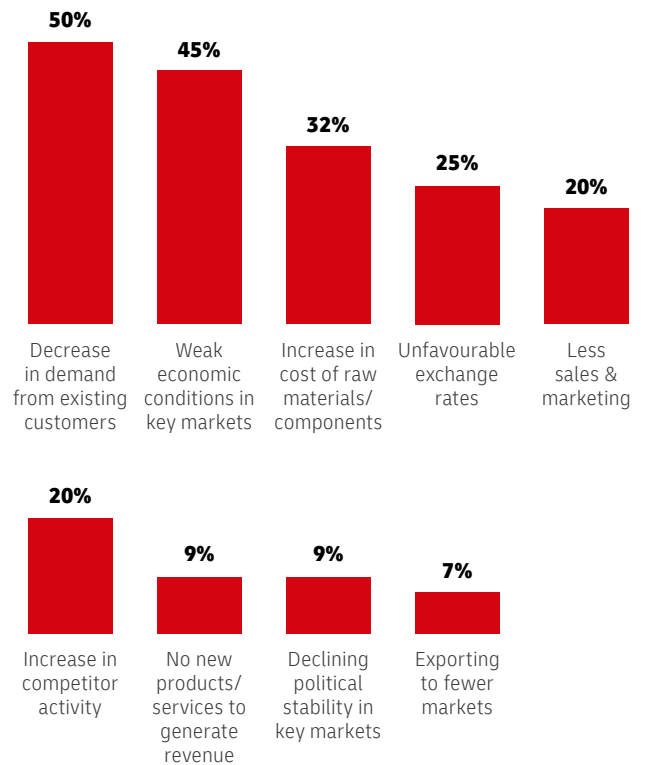
For the 5% of businesses that forecast a decline in revenue, there are some common challenges.

A decrease in demand from existing customers is a concern for 50% of the respondents that are forecasting a not-so-good year ahead, while weak economic conditions will impact 45%.

One-third (32%) will battle rising materials costs, and 20% face tough times from increased competition.

Furthermore, 25% report unfavourable results from the exchange rates, suggesting the cost of raw materials from overseas is difficult with the weak Australian dollar.

## Reasons for export revenue decrease



## JOBS GROWTH AND WAGE INCREASES

# SIGNIFICANT WORKPLACE CHANGES ON THE HORIZON

Thriving exports has resulted in sizeable demand for a wide range of innovative logistics solutions and this is having big knock-on effects for job prospects and wage growth.

In 2022, the highest proportion of Australian businesses in more than a decade anticipated staff increases and wage rises.

Half (52%) plan to boost workforce numbers, while a whopping 73% said workforce wages would be boosted – an increase of 16% from 2021.

Larger businesses in particular, are gearing up for some big changes with 67% flagging workforce expansion, and 91% projecting wages increases.

The rapid wage growth is partially attributed to the highly inflationary environment occurring in Australia at the moment. But the willingness to lift wages is also a sign that exporters are keen to invest in the local economy, further strengthening the confidence of businesses to adopt innovative business strategies and further fuel future trade growth.

# ↑ 52%

**of businesses plan to increase employee numbers, up 4% on last year**

# ↑ 73%

**plan to increase wages, up 16% on last year**



EXPORT MARKETS

# EXPORTERS TACKLE NEW MARKETS

On the back of the rising positive sentiment, the bulk of Australian exporters are seizing the opportunity and expanding into new international markets.

The Barometer found that the average number of destinations targeted by individual traders rose to 4.5 in 2022 – higher than in 2019 and this figure is expected to grow.

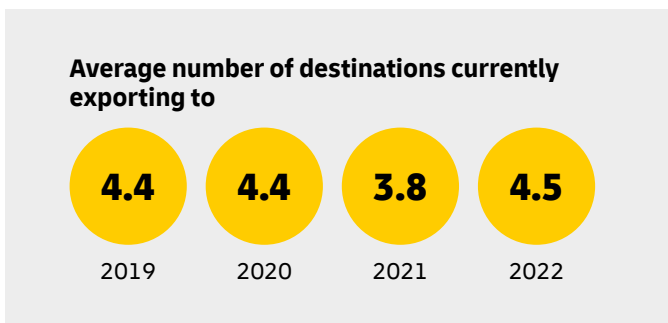
Unsurprisingly, SOHO businesses shipped to the least number of destinations. Typically, these smaller operators targeted 4 markets on average, most commonly North America, New Zealand, the UK and Europe.

Small to larger-sized businesses had slightly more international shipping destinations, with the top locations targeted including New Zealand, North America and Europe.

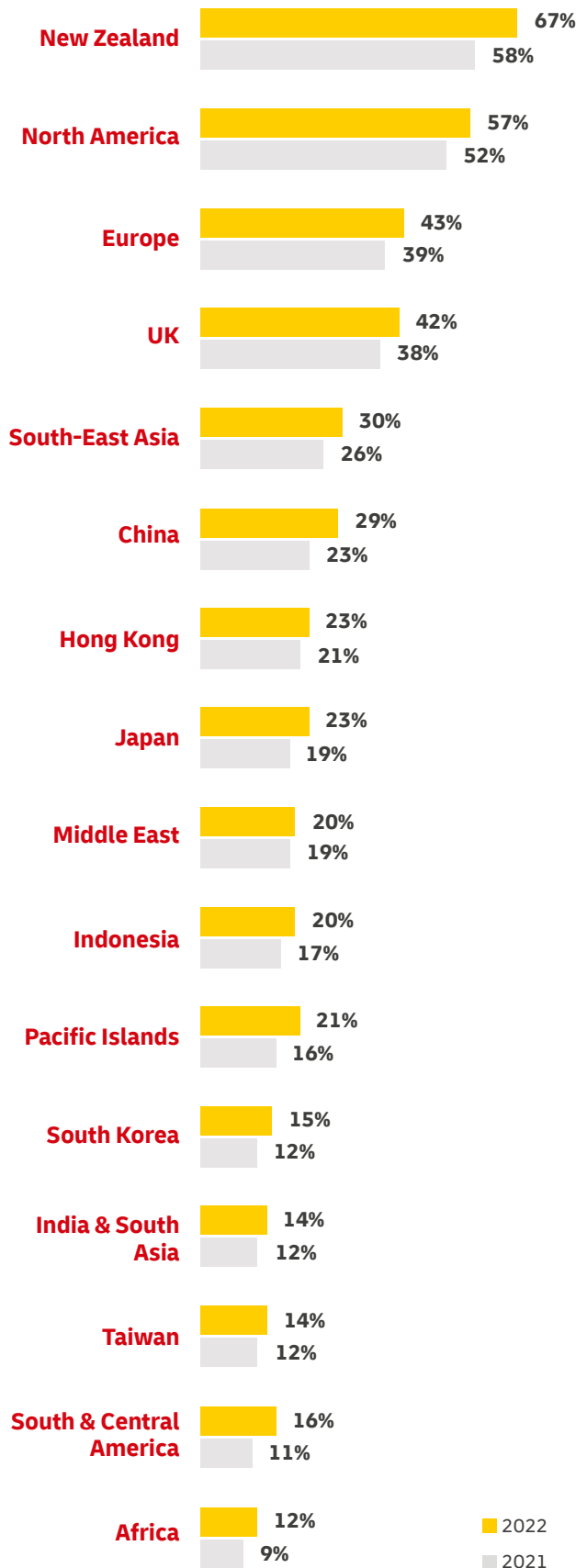
The data also revealed that looking at all businesses, regardless of size, New Zealand was the most commonly targeted market, with almost 7 in 10 (67%) Australian traders active across the ditch.

North America (57%), Europe (43%), the UK (42%) and South-East Asia (30%) were also top destinations.

Moving forward, China will be the nation to watch. Businesses appear to be responding to a shift in trade relations with exports to the region up 6%.



## Current export markets



EXPORT MARKETS

# NEW ZEALAND RECLAIMS TOP SPOT

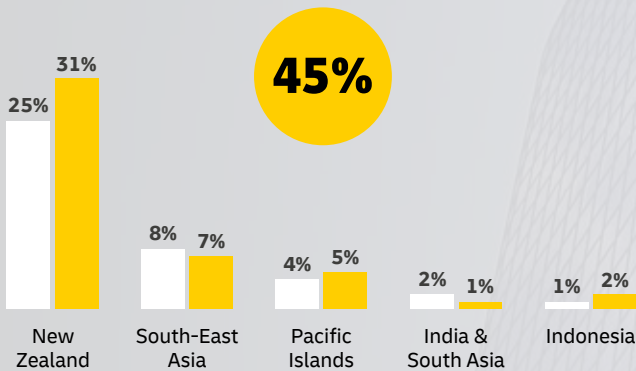
In 2022, New Zealand once again claimed the title of top primary market after being surpassed by North America in 2021.

One-third of Australian exporters reported that New Zealand was their biggest export market; 29% said North America, Europe 8%, and South-East Asia, 7%.

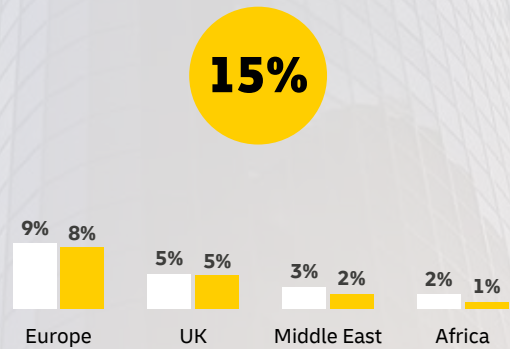
■ 2022  
■ 2021

## Main export market

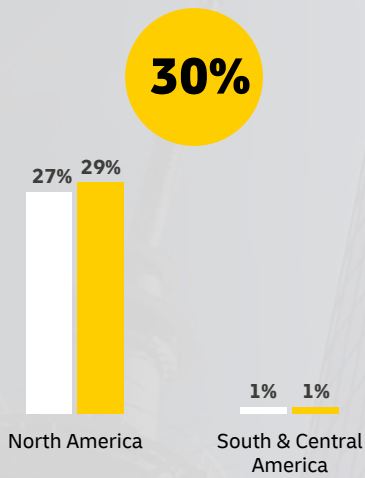
### South-East / South Asia & Pacific



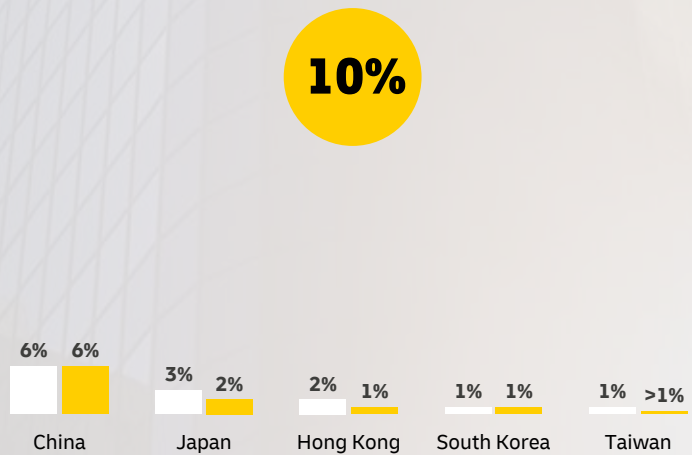
### Europe / Middle East / Africa



### Americas



### North-East Asia



EXPORT MARKETS

# EXPANSION ON THE HORIZON

Australian traders have always had a broad global reach, and this year will be no different with many exporters expanding their footprint further.

Looking ahead, almost half of businesses (48%) intend to enter a new market.

Western markets will be the main priority with North America and Europe at the top of the list for traders looking to break new ground.

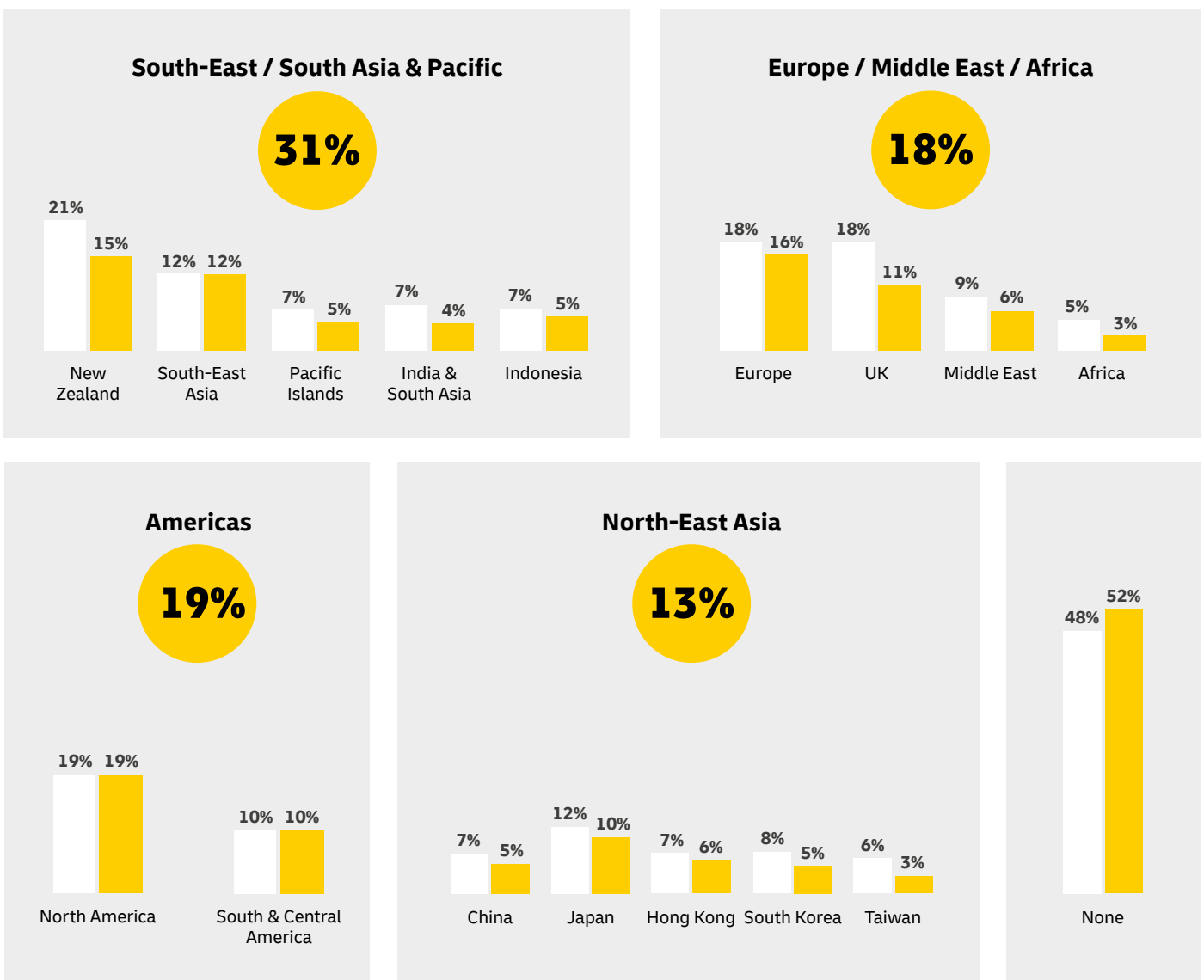
The strong push into these destinations is being spearheaded by operators that are new to the export industry, and SOHOs selling consumer goods.

Meanwhile, medium-sized businesses appear to be expanding delivery into South-East Asia and the Pacific.

Large Australian exporters will continue to focus on a broader range of new markets delivering to ports across the globe.

## Markets planning to target in next 12 months

□ 2022 ■ 2021





IMPORT MARKETS

# TWO-WAY TRADE IS GROWING

Importing and exporting go hand-in-hand, with most of Australia’s exporters engaging in trade both ways.

However, this year’s Barometer reveals 88% of businesses import and export – up 6% from last year.

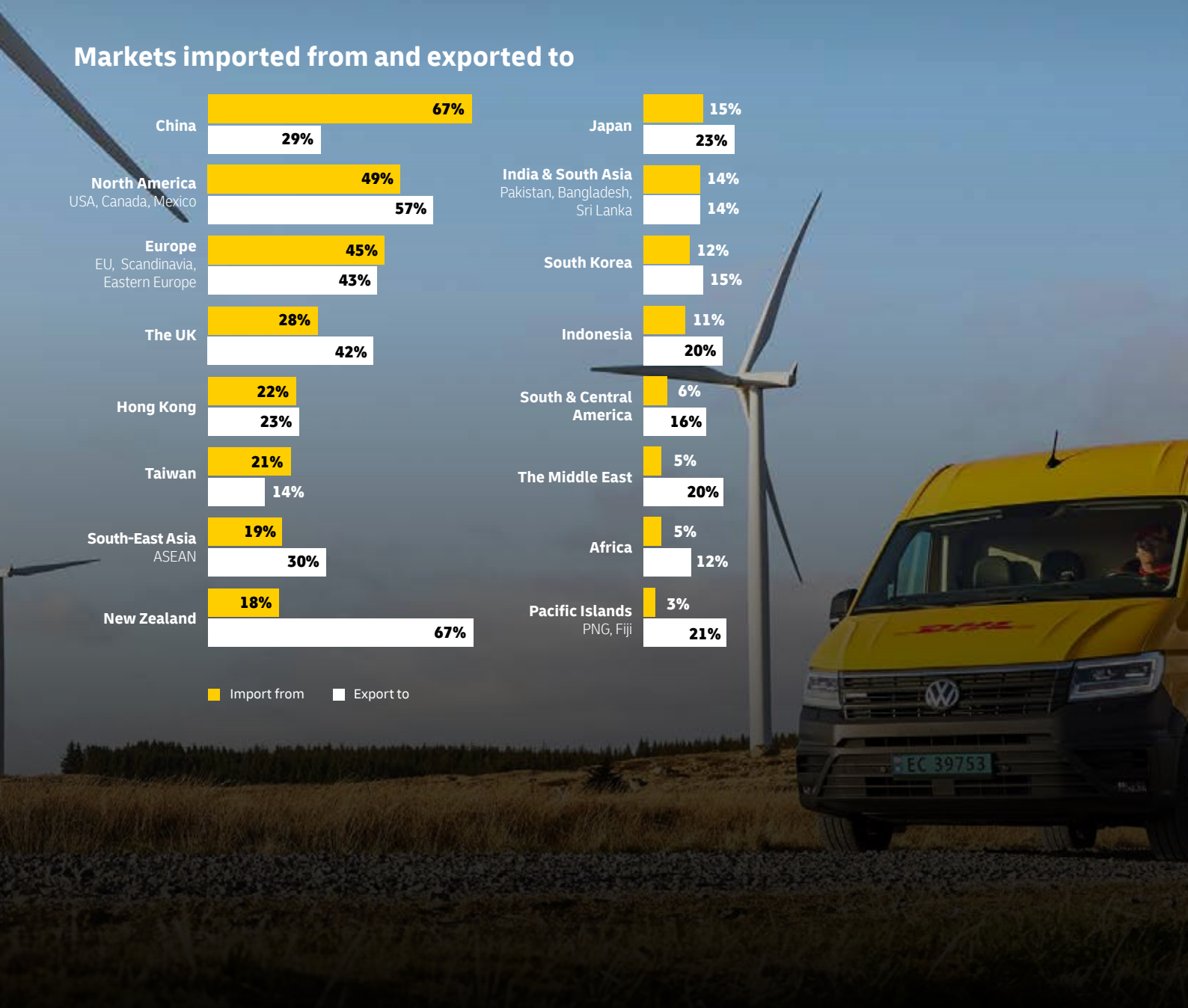
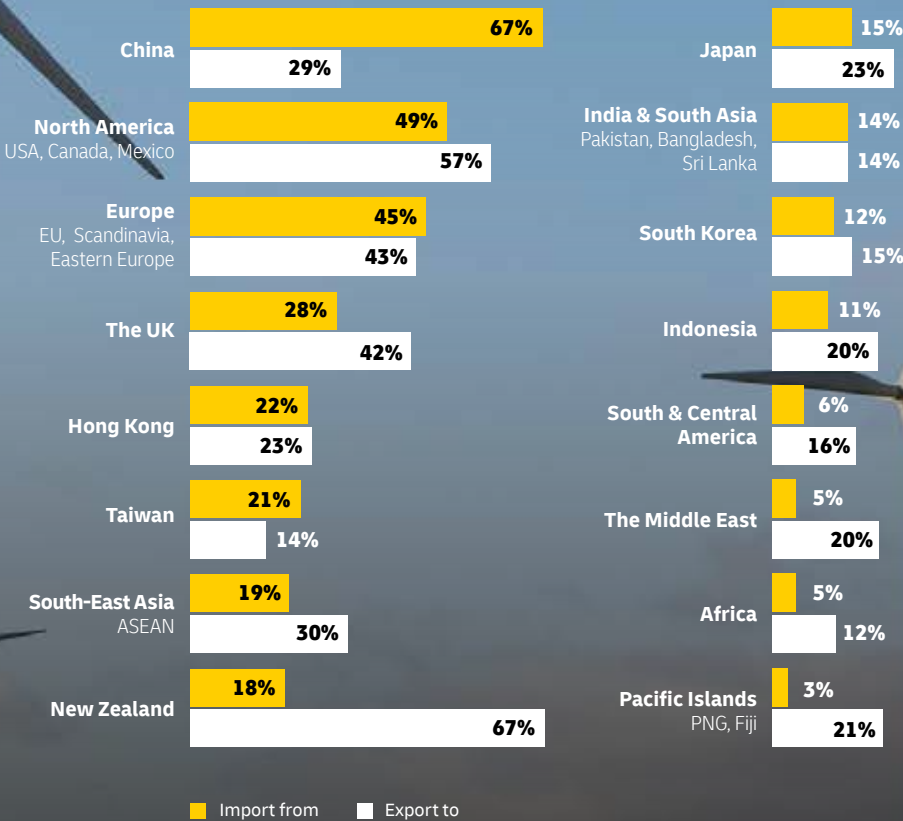
Unsurprisingly, larger businesses that have been exporting for longer periods of time were the biggest drivers of two-way trade, with mining and manufacturing businesses the most likely to be bringing goods in.

Small to medium-sized businesses also import but generally at a reduced level.

When it came to the location, goods and materials were typically being sourced from China, North America and Europe.

Notably, importers across all sectors, from mining to consumer goods were shipping products and materials from China, but imports from the region were less common for agricultural businesses.

## Markets imported from and exported to



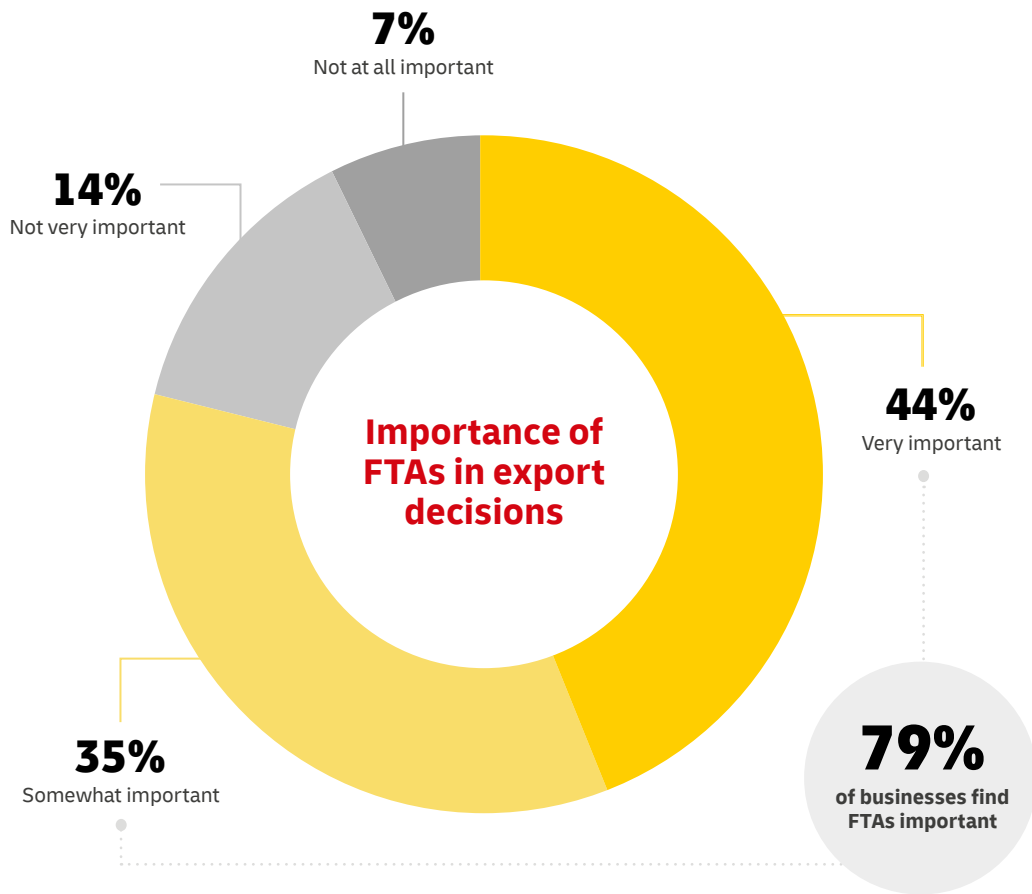
FREE TRADE AGREEMENTS

# FREE TRADE DEALS BACK IN FOCUS

As the world grappled with COVID-19, attention on trade barriers waned, but FTAs are now back in the spotlight.

This year's survey established a whopping 79% of Australian businesses believe FTAs are important to their business – with 44% suggesting they are critical.

FTAs also appear to have financial benefits, with businesses that anticipated revenue increases over the coming year also more likely to rate the agreements as essential.



Australian exporters report navigating roughly a dozen international agreements, with the AANZFTA, ChAFTA and AUSFTA among the most commonly encountered.

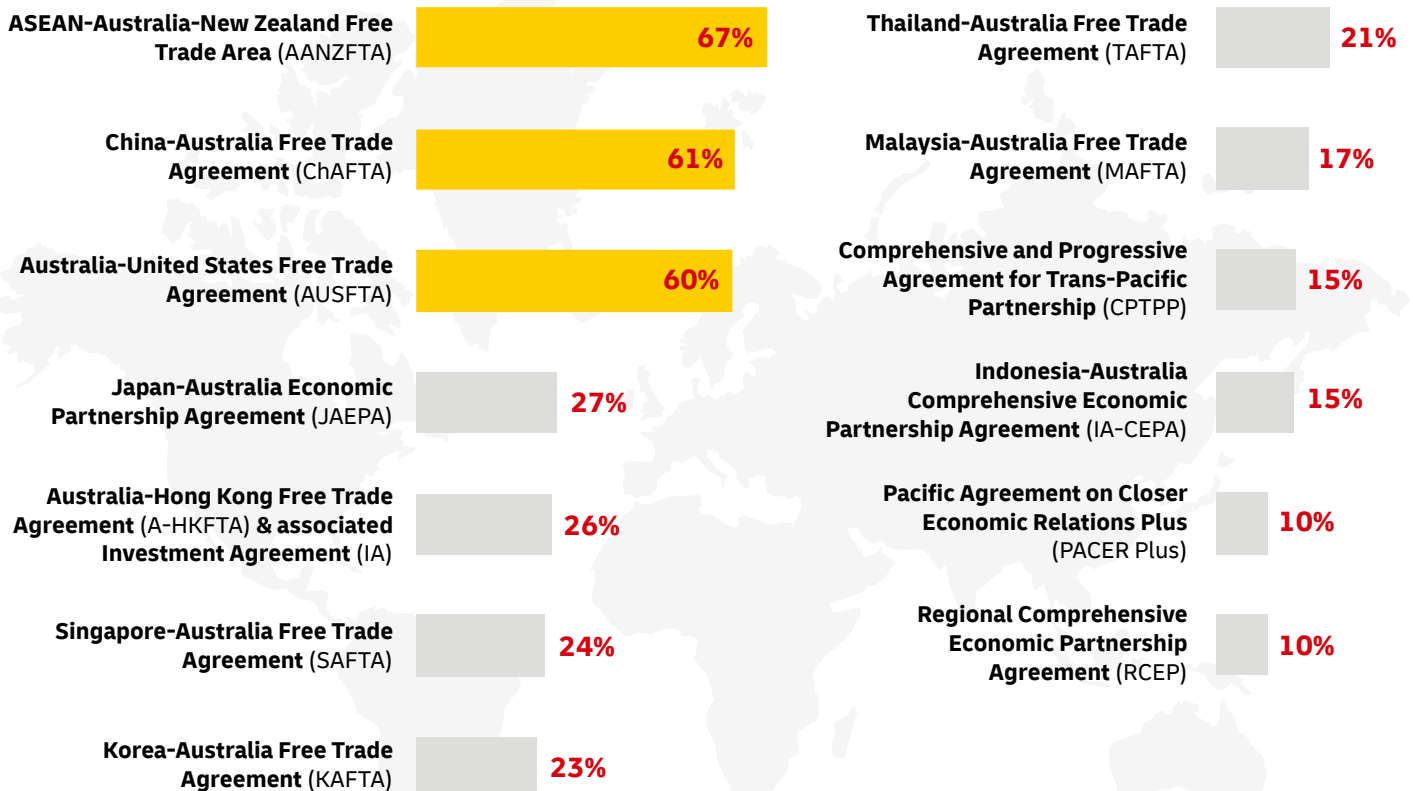
Of the businesses exporting under these three FTAs, those involved in agriculture, manufacturing and consumer goods were most likely to put them to good use, while the mining and services sectors report lower impacts from trade agreements.

Finally, a surprising revelation in this year's results was the fact many exporters had gaps in awareness about FTAs and how the agreements impacted their business.

One quarter (25%) of the companies operating in North America, 24% targeting New Zealand and 21% trading with China report they did not know an agreement was in place for the territory they were operating in.



## Most utilised FTAs by those aware



EXPORT CHALLENGES

# CHALLENGES FACED IN THE INTERNATIONAL MARKETPLACE

Offshore markets offer plenty of opportunity, but not without a hurdle or two.

Most Australian traders (90%) say they encountered export challenges in 2022.

At the top of the list was increased cost of freight, which troubled 64% of businesses. It continues to be an issue felt in markets across the globe, but in particular it is impacting exporters operating in the Americas and the Europe/UK/Middle East/Africa regions.

Other common challenges included supply chain disruptions, tariffs, unpredictable exchange rates, transport logistics and new competition.

## Challenges faced by exporters



## EXPORT CHALLENGES

# OVERCOMING SUPPLY CHAIN UNCERTAINTY

Vulnerability in the global supply chain came to the fore in 2020, and while the issue has vastly improved, there are still ongoing disruptions that exporters are learning to deal with in every-day business.

As a result, to mitigate risk and add flexibility, while at the same time becoming more competitive, exporters are diversifying.

Almost half of the businesses with supply chain vulnerabilities have taken on multiple suppliers to provide alternatives in times of need.

Other innovative ways that exporters are tackling the issue include increasing stock levels, sourcing raw materials, setting up their own manufacturing alternatives or entering joint ventures with advantageous partners to ensure supply.

Unquestionably, for businesses willing to adapt the foresight has paid off, with the businesses that expect revenue to increase more likely to have adjusted their supply chains.

## Methods of supply chain diversification in the past 12 months

### Sourcing from multiple/different suppliers

47%

### Increasing stock levels

46%

### Sourcing products/raw materials from alternative markets

30%

### Manufacturing/sourcing more domestically within Australia

23%

### Setting up manufacturing in alternative markets

14%

### Joint ventures with other businesses

11%

### Introducing/strengthening ESG (Environment, Social and Governance) compliance/due diligence measures

8%

### Relocating overseas offices to alternative markets/opening additional offices

5%

### None of these

20%



EXPORT CHALLENGES

# FINANCIAL FITNESS UNDER CONTROL

Getting finance can sometimes be tricky for export businesses, and this year things were no different.

In 2022 the majority of Australian export businesses said they did not need trade finance. But of those which did, 8% encountered difficulty getting a loan.

While this figure has dropped significantly from 13% in 2021 – and is now on par with the pre-pandemic years – exporters still indicated some main bugbears with the borrowing process.

The leading issue grappled with when getting a loan was the cost of borrowing. With interest rates rising, 51% of businesses seeking finance said the cost of servicing the loan was a serious concern.

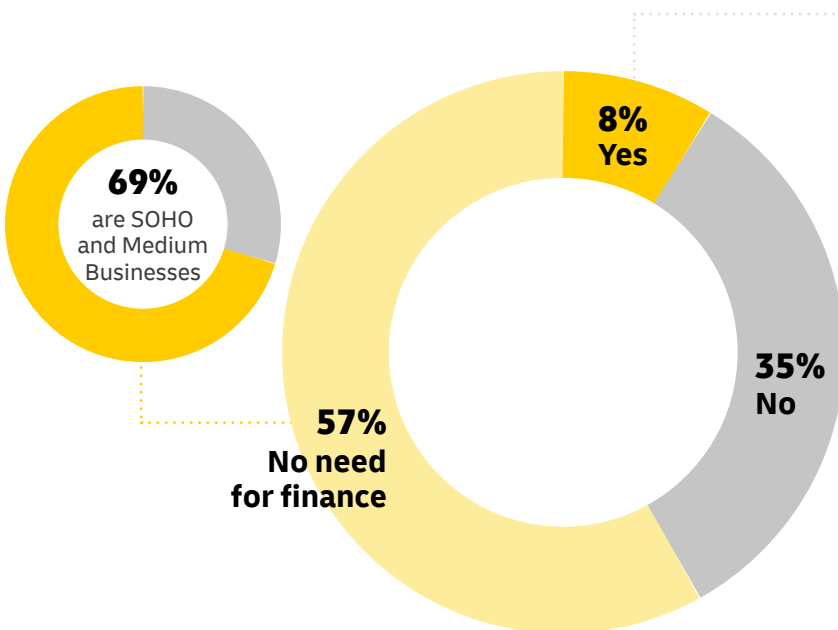
Stringent lending criteria and the bank not understanding the intricacies of trade businesses were also common complaints.

On the positive side, 35% of traders obtained finance without difficulty.

It was also a good year on the accounts front, with few exporters incurring bad debts. Only 8% of traders copped losses, mostly related to customer accounts in the Americas.



## Experienced difficulties obtaining trade finance in the past 12 months



### Main reasons

Cost of finance was too expensive



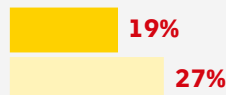
The lending criteria has become more stringent



Bank does not understand our exporting business



Lack of security



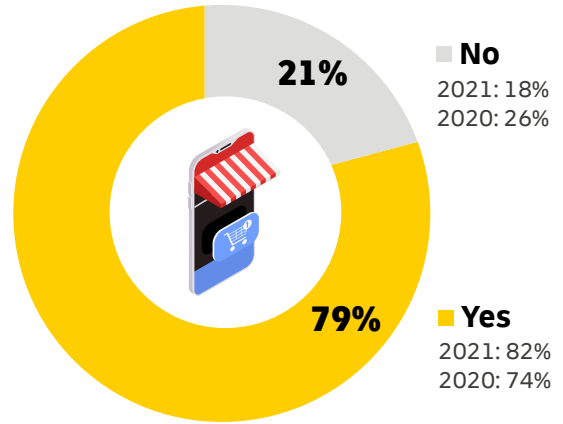
E-COMMERCE

# WEB-BASED ACTIVITY CONTINUES TO DRIVE GROWTH

Australian businesses are now well-versed on the benefits of e-commerce when tapping into international markets.

Data reveals, 4 in 5 exporters (79%) generate orders through online channels, with just under a quarter (24%) confirming they rely solely on e-commerce to create revenue.

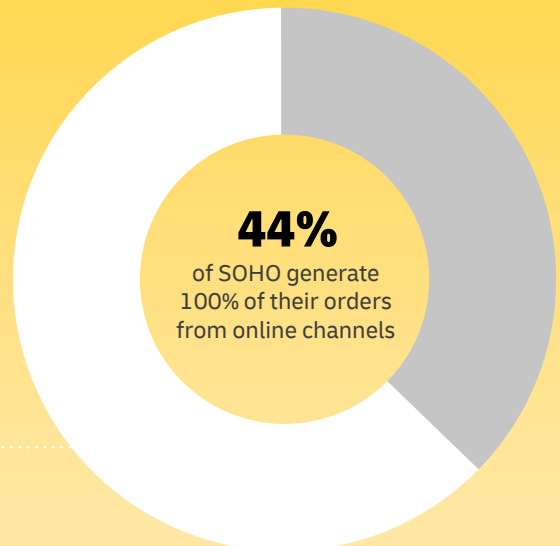
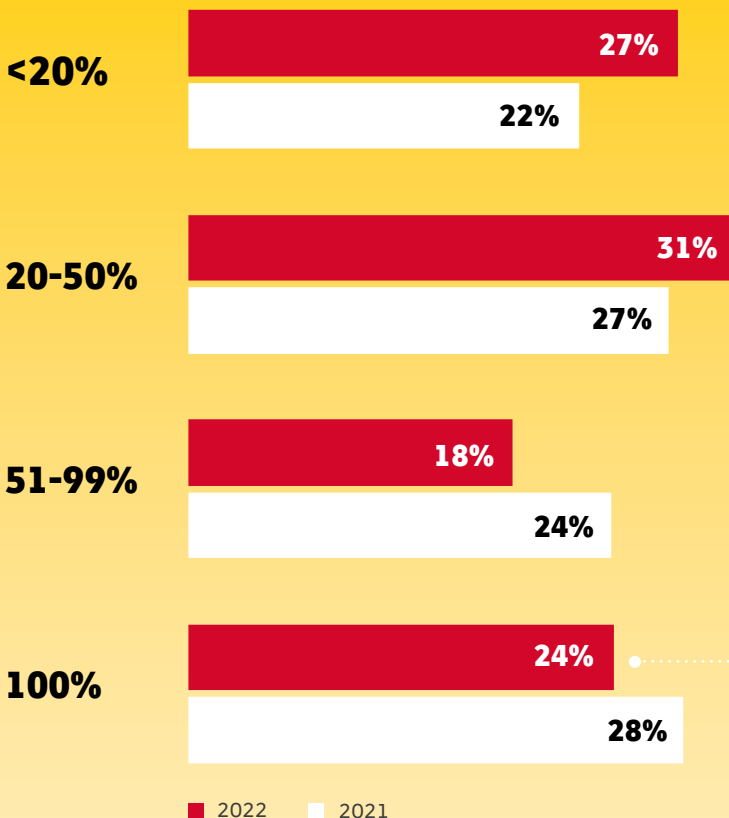
## Exporters who generate orders/enquiries online



SOHO	86%
Small Business	86%
Medium Business	68%
Large Business	65%

## Orders/enquiries generated through online channels

amongst exporters who generate online sales



Encouragingly, online business is also on the rise with 47% of companies reporting online orders increased over the past 12 months – including 14% that experienced a significant spike.

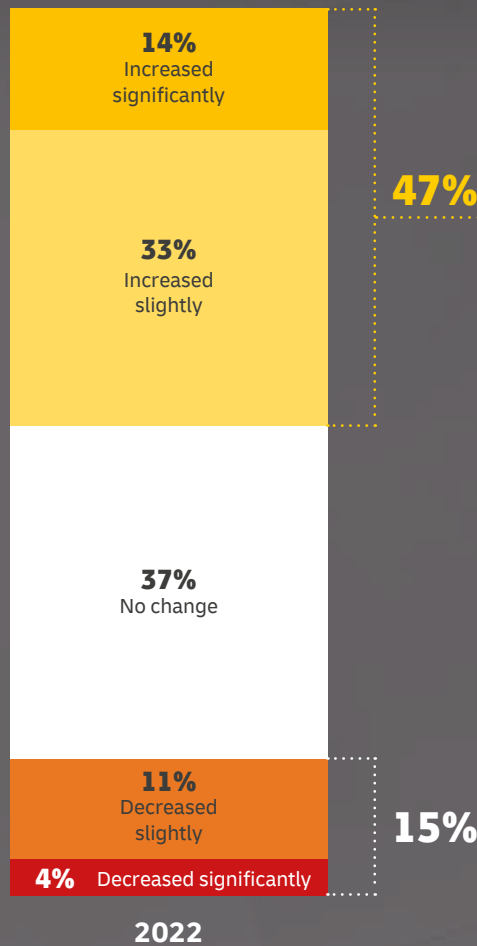
Unsurprisingly, consumer goods exporters were especially likely to benefit from web-based sales, with 54% of these businesses reporting an increase in online orders.

Meanwhile, many SOHO setups indicated they were very reliant on the internet for easy access to customers, with 44% of the cohort operating purely online.

Pointing to a potential positive return on e-commerce investment, 55% of export businesses that expect revenue to increase in the coming 12 months had also seen their online orders increase during the past year.

## Change in online export orders

in the past 12 months



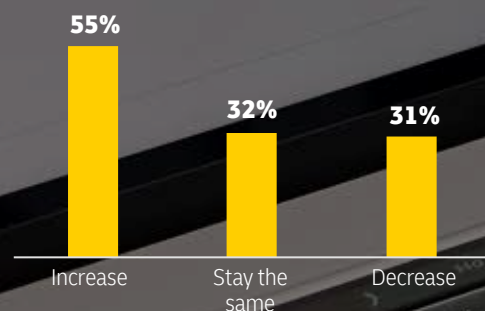
### By industry



### By business size



### By revenue expectation





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# PUSHING FOR GROWTH

*While the overall popularity of using online channels to attract business remains high, there is emerging evidence that some exporters are moving away from online marketing and finding alternative methods to reach customers.*

The main change worth noting is the proportion of businesses not spending any of their marketing budgets online, which has jumped from 12% to 26%.

This suggests some businesses have found more efficient ways to drive demand offline rather than paying for online advertising.

However, this trend could be sector-specific – with almost 2 in 5 (39%) of the businesses choosing not to invest in online marketing involved in manufacturing.

While some exporters may see these results and consider shrinking their online marketing budget, it’s worth noting that overall businesses which invest online are more likely to predict increased revenue.

Industry-wide, the bulk of businesses continue to invest in online activities as a growth strategy.

This includes 36% of businesses that plan to invest in online marketing this year, 34% will put money into website design and 31% will take steps to improve fulfilment and delivery of online orders. These are all strategies consistently utilised long before the pandemic.

Smaller companies and newcomers to the export industry are clearly the most committed to online order generation, with these cohorts more likely to spend more than 50% of their marketing budget online.

## Strategies to drive online export orders



E-COMMERCE

# ONLINE CHANNELS TOP THE CHARTS

**For Australian exporters engaging in online marketing, social media remains the top choice, although, the use of social media channels has fallen slightly to 61%, down from 65% in 2021.**

Facebook is the highest rated of the preferred platforms with engagement from 45% of exporters. Instagram (39%) and LinkedIn (24%) accounted for the bulk of other social media options. The number of traders using Google advertising and search engine marketing dropped from 41% to 35%.

At the same time, the proportion using newer platforms has risen. TikTok was used by 7% – up from 4%.

When it comes to website building tools, Shopify is the preferred option used by more than a third (34%) of exporters. Australian exporters were also spending big on custom-made websites, to the detriment of WordPress, which saw users drop from 32% to 19%.

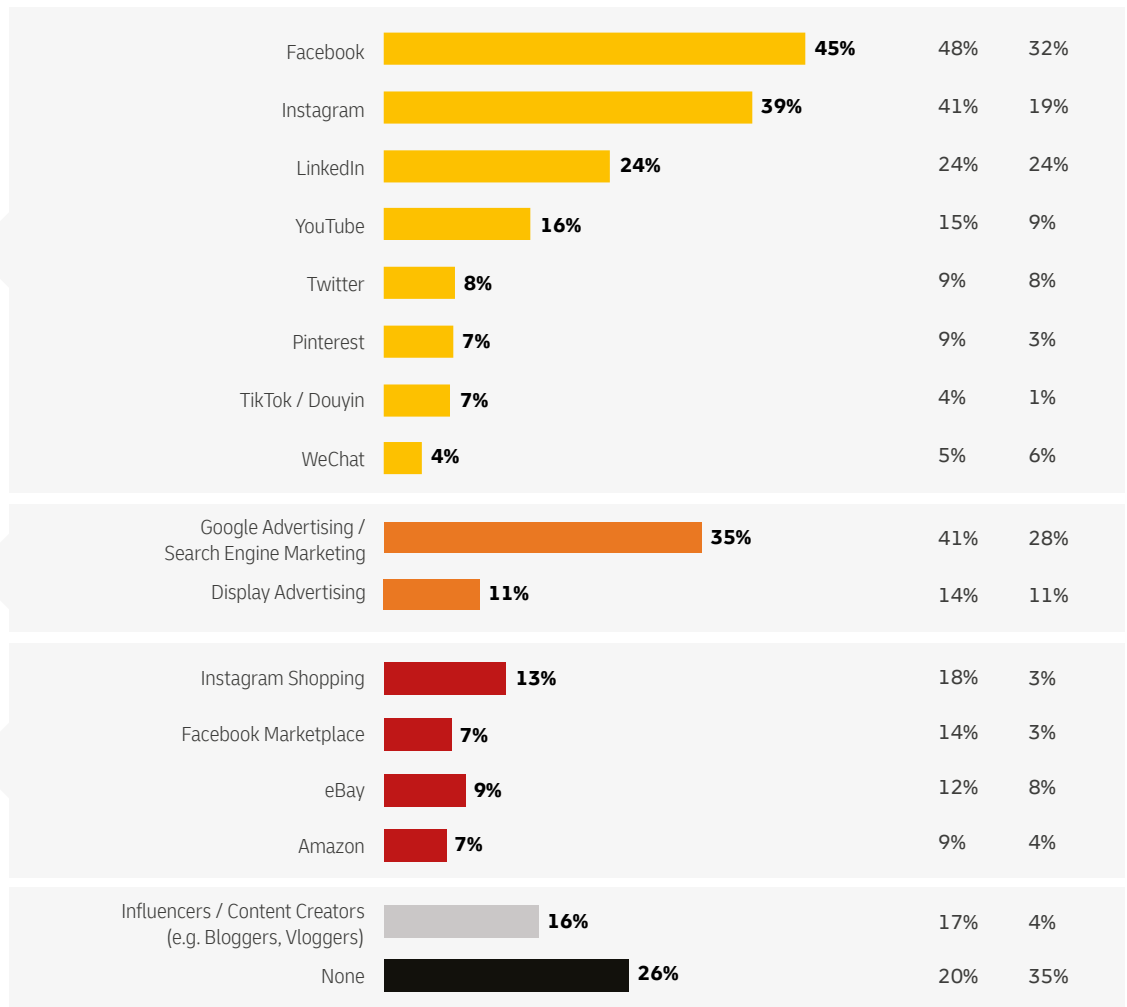
Among the businesses that used online store platforms, Shopify was again the top choice.

## Online channels used for export enquiries and orders

**61%**  
use social media channels  
2021: 65% | 2020: 47%

**37%**  
use online advertising  
2021: 44% | 2020: 12%

**25%**  
use online marketplaces  
2021: 33% | 2020: 12%





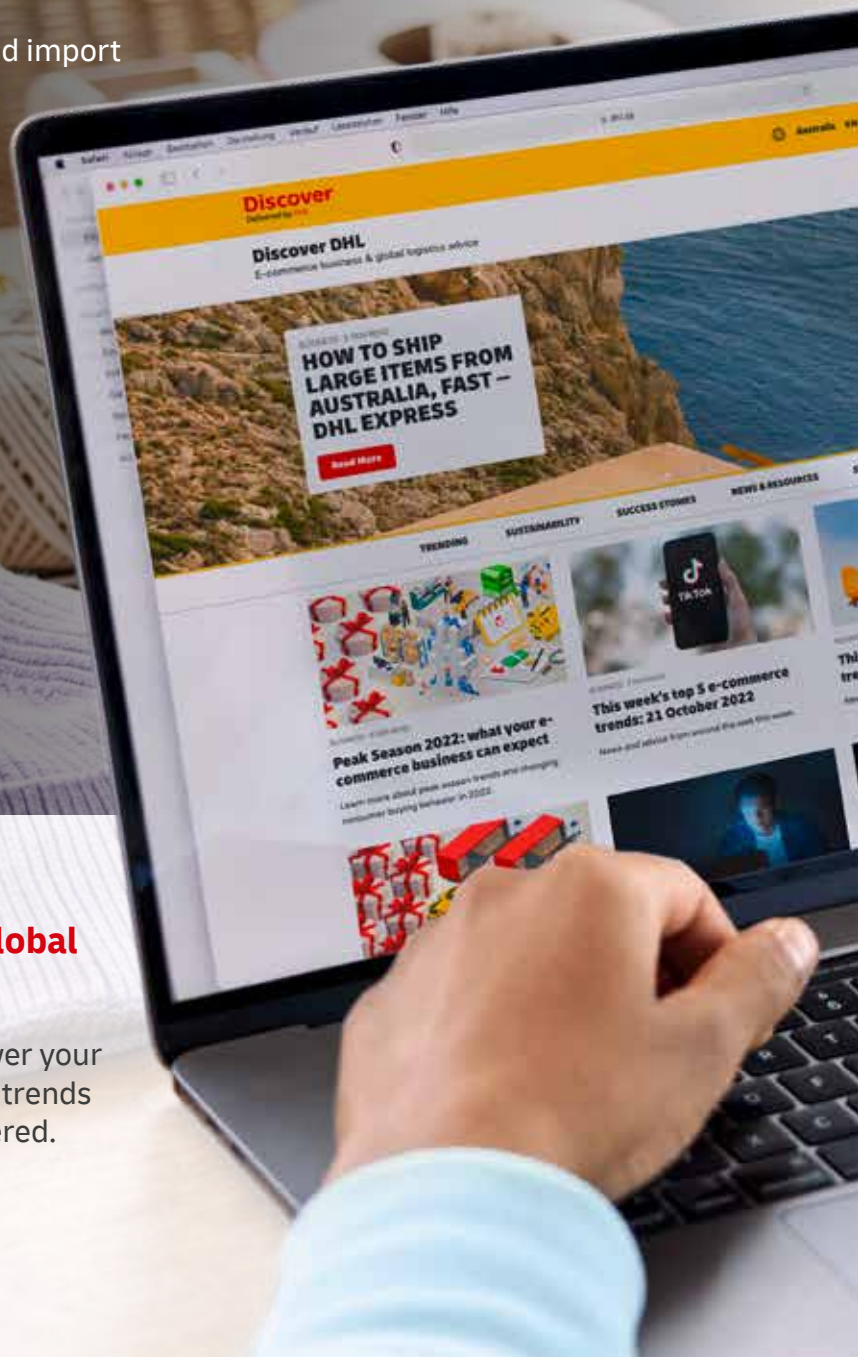
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Published November 2022

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