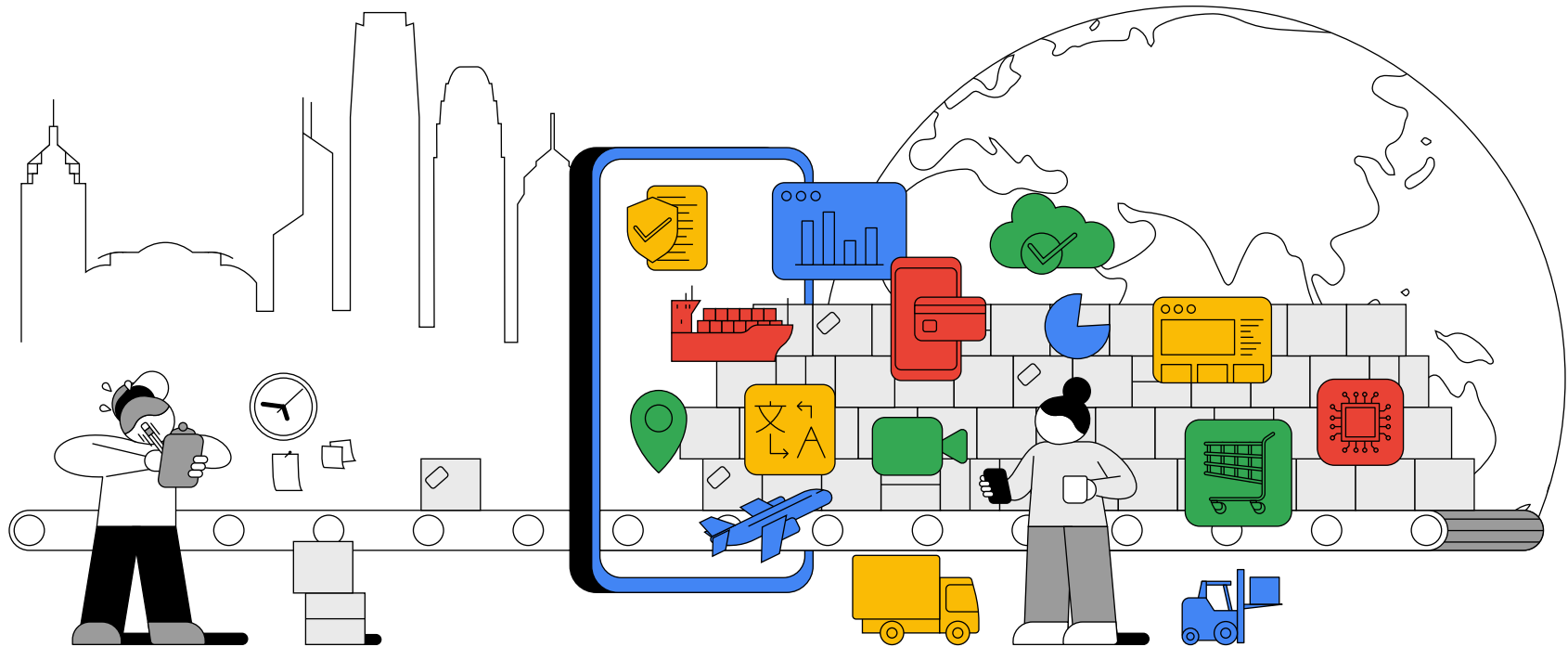


Smarter Digital City



A Refreshed Look at Export

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08 Key Finding 1

Global revenue share for Hong Kong exporters has increased. Furthermore, exporters are seeking to pilot new markets in 2022. Southeast Asia is considered an attractive market cluster.

14 Key Finding 2

Exporters, particularly SMBs, need support to overcome key barriers. Exporters' top challenges are in marketing, policy and regulations, and business operations.

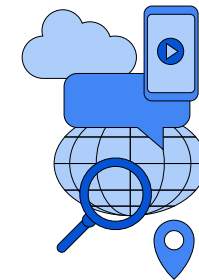
21 Key Finding 3

Exporters benefit from digital adoption. They plan to invest more in digital tools to increase market share and customer base as well as enhance their global branding. However, there is a need for digital upskilling.

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Foreword



2021 was a year unlike any other - the pandemic has impacted global economies and presented both challenges and opportunities for Hong Kong businesses.

At Google Hong Kong, our teams are committed to helping the city and businesses unlock the full potential of digital. Business leaders and owners have continued to demonstrate their resilience, creativity and innovation by finding new ways to connect with consumers and sustain their businesses or, better yet, transform their businesses and reach new heights. Our Smarter Digital City initiative, which was launched in 2017, has continued to share thought leadership reports, provide education resources and invest in talent development programs to help businesses accelerate their digital transformation journey.

In many ways, digital has allowed businesses in Hong Kong to connect with the global economy. Export has increasingly been one of the city's key economic boosters, with merchandise exports increasing by 25% in November 2021 over the same month a year earlier.

This research report “A Refreshed Look at Export” identifies the challenges and growth potential, specifically on how Hong Kong exporters will thrive with digital tools and platforms.

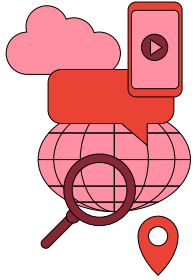
I am thrilled that Hong Kong Trade Development Council (HKTDC)'s T-Box and Grow with Google are launching the “Google Export Program” to better support Hong Kong small and medium-sized businesses in digital upskilling, covering training, consultation, and best practices.



Michael Yue

General Manager, Sales & Operations,
Google Hong Kong

Executive Summary



Export as an economic recovery driver

- Hong Kong is one of the world's largest merchandise trading economies
- Export has been a recovery driver of the Hong Kong economy amid the pandemic
- Small and medium-sized businesses (SMBs) have been actively going global to build resilience

Strong momentum for global export

- E-commerce has made it easier for SMBs to export. About half of Corporates are pressured by their peers to go global
- More than 60% of exporters consider Southeast Asia as an attractive region, as its Internet economy is expected to reach USD360 billion by 2025

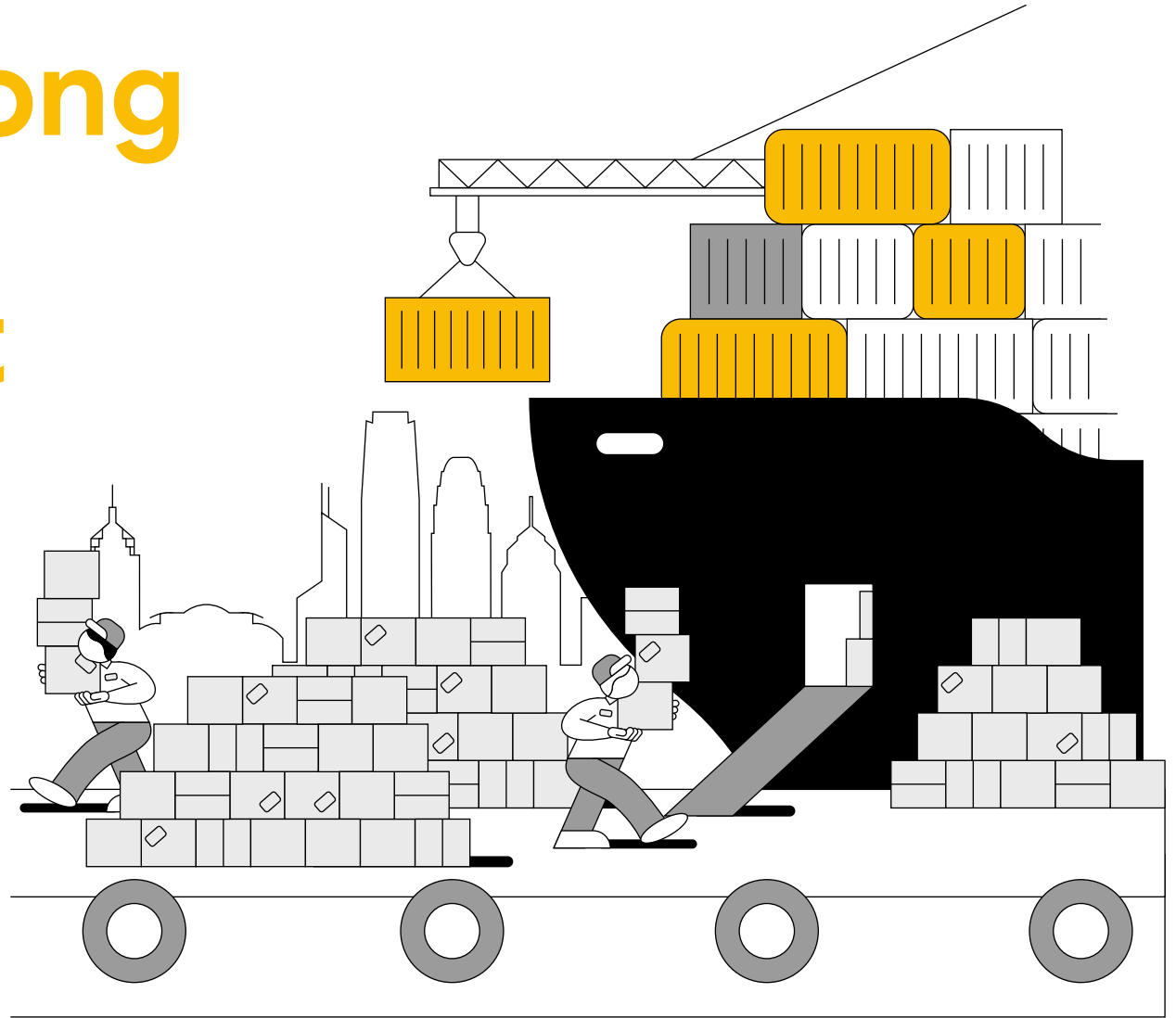
Barriers hindering growth of exports

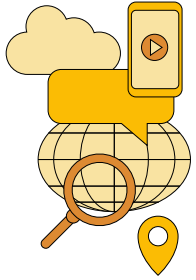
- Marketing Barriers: Exporters face challenges in localisation, getting local insights and using digital ads. SMBs particularly lack agency support
- Policy and Regulatory Barriers: Exporters need to get accurate information of trade regulations and rules. SMBs need more support in overcoming regulatory barriers
- Business Operations Barriers: Exporters express difficulties in building partnerships and managing production abroad

Continuous digital investment and upskilling

- 68% of exporters plan to increase their investment in digital tools this year
- SMBs currently rely on offline approaches for market research, while they express the desire to be educated on digital ads and other digital tools. Corporates want to learn more about digital ads that can increase consideration among prospects
- To service and retain their clients, SMBs and Corporates want to be upskilled for cloud tools including data analytics and productivity tools

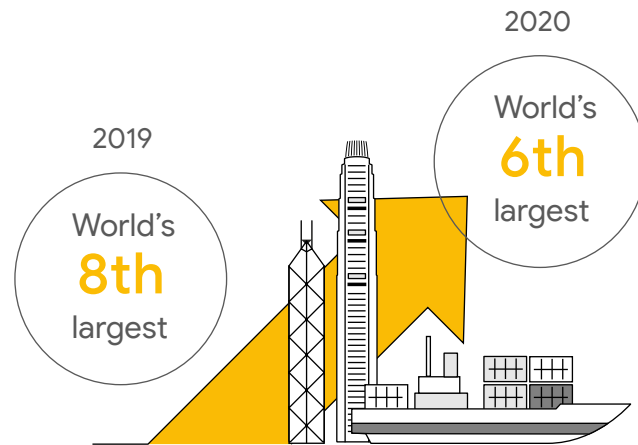
Hong Kong Market Context





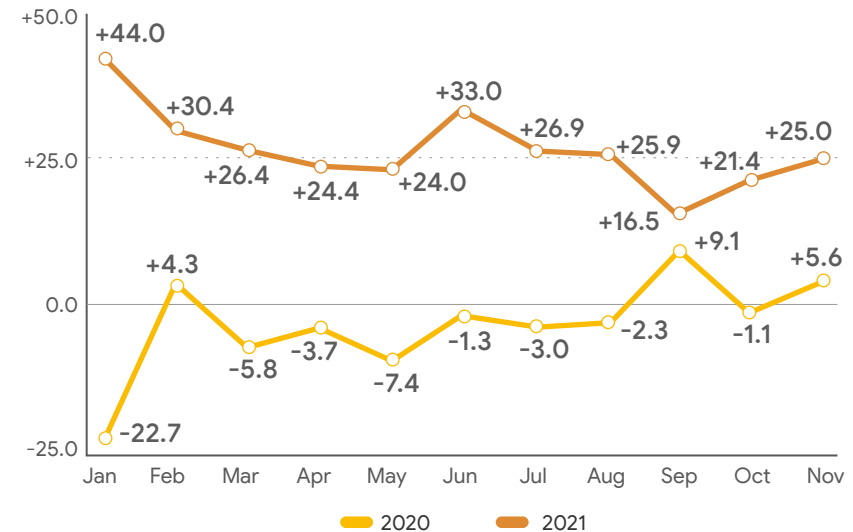
Hong Kong has established itself as one of the largest economies in merchandise trade. Export has been a recovery driver of the Hong Kong economy since COVID-19.

WORLD RANK OF HONG KONG MERCHANDISE TRADING ECONOMY

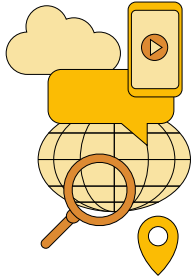


MERCHANDISE EXPORT GROWTH

Year-on-year % change



Source: WTO; Census and Statistics Department, HKSAR (November, 2021); Hong Kong Trade Department Council (Jan 2022)



“ Hong Kong is ranked amongst the world’s top 6 largest merchandise trading economies and export has been a competitive edge of the city. For the first 11 months of 2021 as a whole, the value of total exports of goods increased by 26.5% over the same period in 2020.

During this extended pandemic period, we saw that small and medium-sized enterprises (SMEs) have built resilience by diversifying their revenue and sourcing to new markets abroad, as well as accelerating the uptake of e-commerce and digitalisation for their business. We look forward to continuing to equip SMEs with the knowledge and tools to go digital and go global.

”

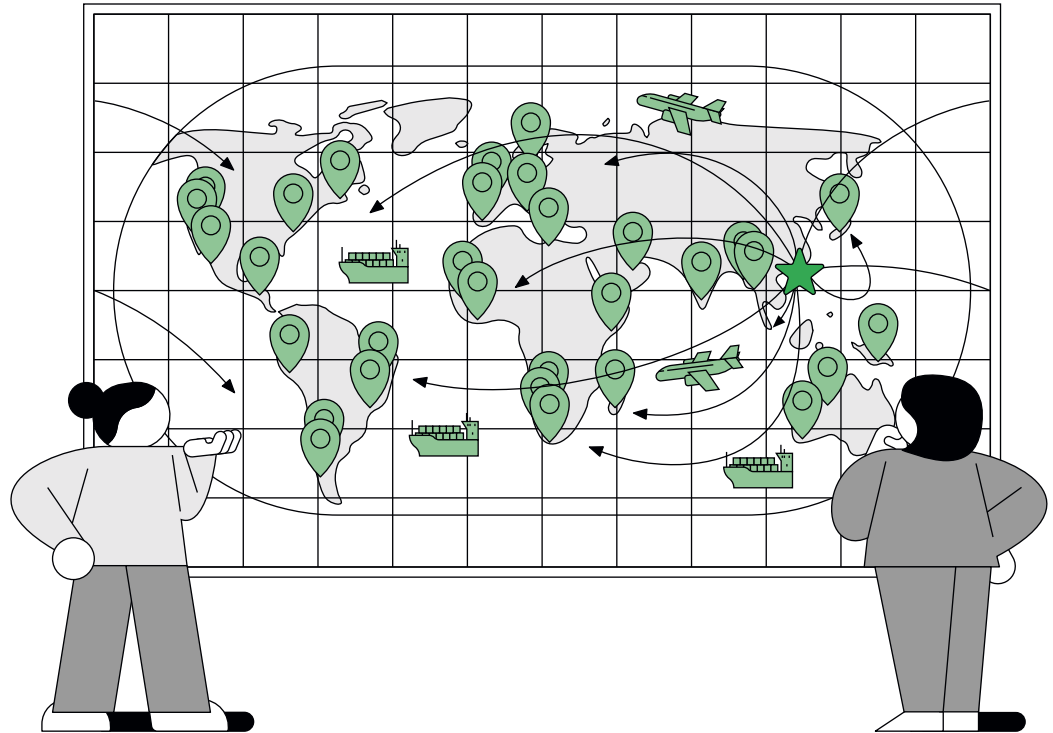


Patrick Lau

Deputy Executive Director,
Hong Kong Trade Development Council

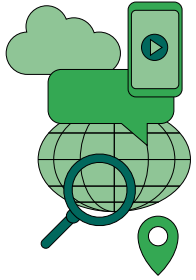
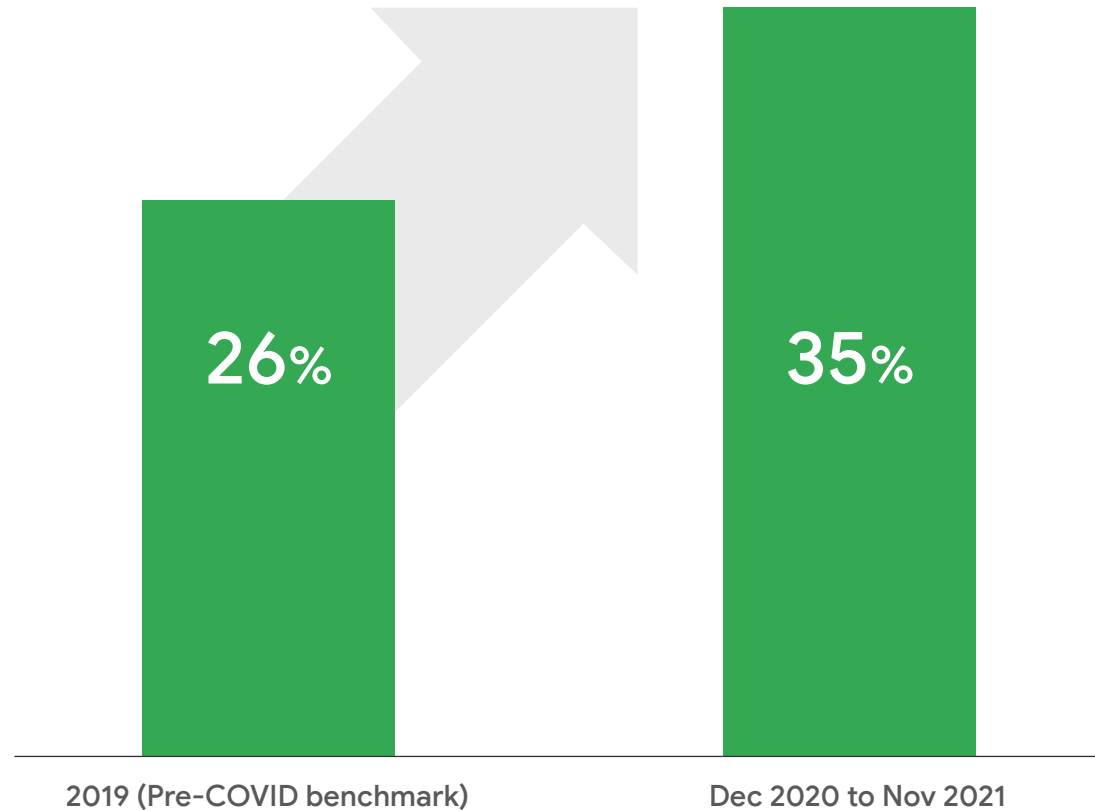
Key Finding 1

Global revenue share for Hong Kong exporters has increased. Furthermore, exporters are seeking to pilot new markets in 2022. Southeast Asia is considered an attractive market cluster.

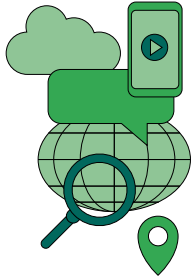


Hong Kong exporters' revenue share from global markets has increased during COVID-19, jumping approximately 9 percentage points since the start of the pandemic.

SHARE OF REVENUE FROM GLOBAL MARKETS

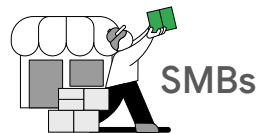


Question: From the last 12 months, what share of revenue do you estimate has been sold to customers in the following locations?
Question: And thinking about 2019, what share of revenue do you estimate was sold to customers in the following locations?
Base: n=205 Hong Kong exporters to global markets

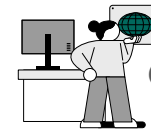
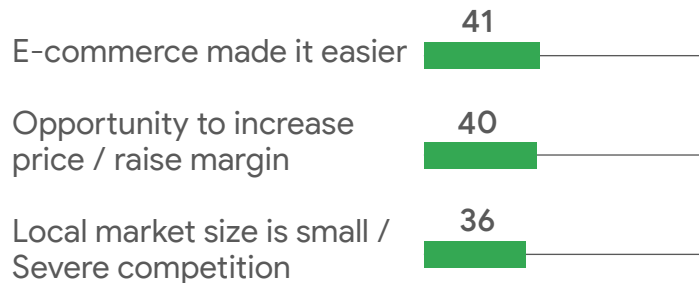


Top reasons to export vary between SMBs and Corporates. SMBs capture the convenience of e-commerce to export, while about half of Corporates are pressured to do so by competitors.

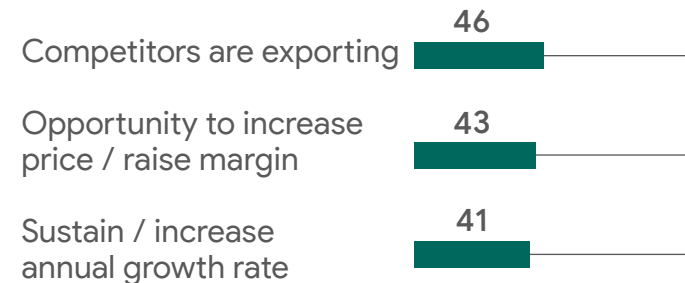
TOP REASONS TO EXPORT (%)



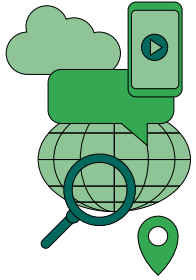
SMBs



Corporates

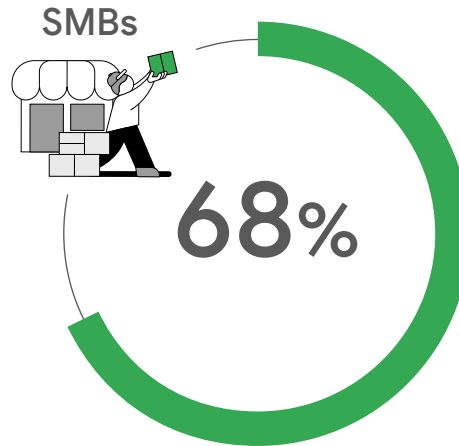


Question: Which of the following are the main reasons why your company sells to customers globally?
Base: n=205 Hong Kong exporters to global markets (103 SMBs, 102 Corporates)



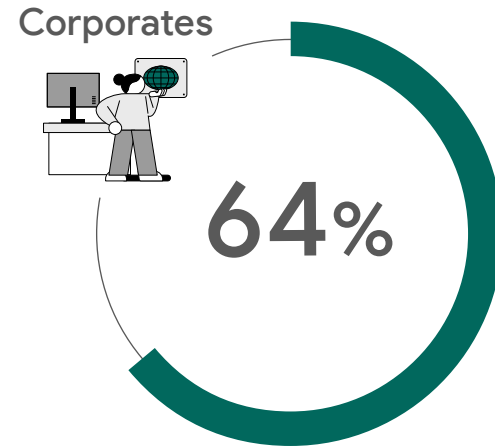
More than 60% of exporters would like to export to new markets in 2022, with a slightly higher desire among SMBs.

% WILL EXPORT TO NEW MARKETS IN 2022



3.0

Average number of
new export markets in 2022

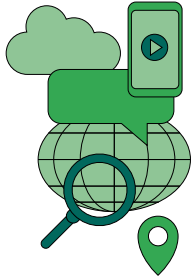


2.4

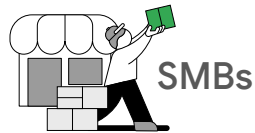
Average number of
new export markets in 2022

Question: To where has your company sold goods or services in the past one year?
Question: To which of these countries / regions would you like to sell more in the next 12 months?
Base: n=205 Hong Kong exporters to global markets (103 SMBs, 102 Corporates)

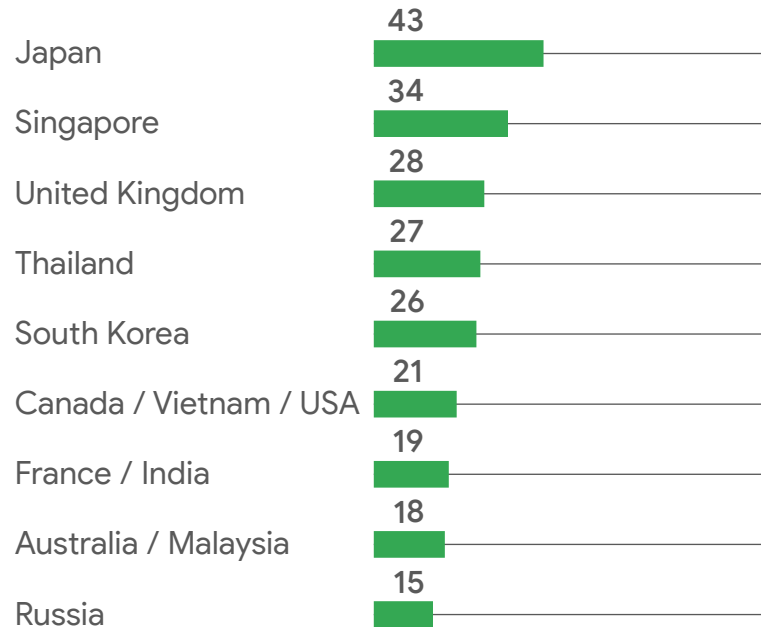
Japan, South Korea, Southeast Asian countries, the United Kingdom, USA, Canada, and France are among the top global markets to sell more to.



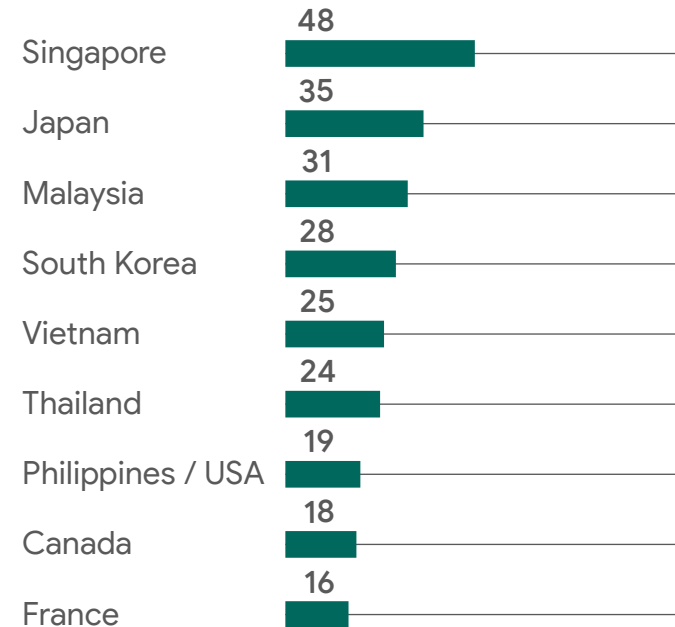
TOP GLOBAL MARKETS TO SELL MORE (%)



SMBs

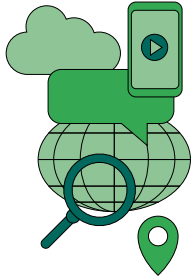


Corporates

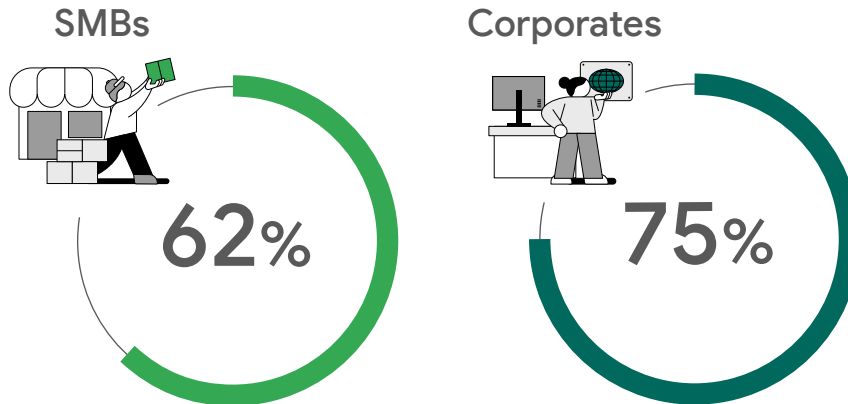


Question: To which of these countries / regions would you like to sell more in the next 12 months?
Base: n=205 Hong Kong exporters to global markets (103 SMBs, 102 Corporates)

More than 60% of Hong Kong exporters eye Southeast Asia as an attractive market cluster.



% WILL SELL MORE TO SOUTHEAST ASIA* IN 2022



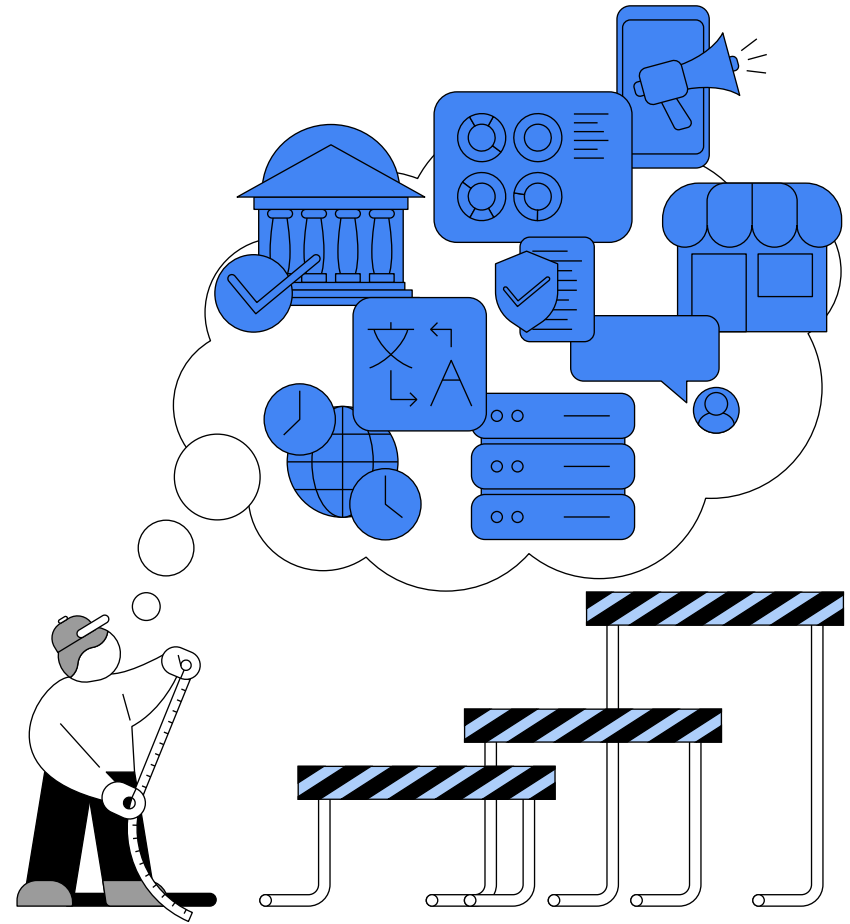
Internet Economy of Southeast Asia

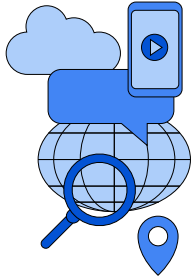
- Consumers in Southeast Asia have been increasingly purchasing **digital services** since the start of the pandemic.
- The Southeast Asia internet economy reached **USD170B Gross Merchandise Value (GMV)** in 2021 and is expected to reach around **USD360B** by 2025, with e-commerce being the biggest growth driver.

* Countries in Southeast Asia include Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam
Question: To which of these countries / regions would you like to sell more in the next 12 months?
Base: n=205 Hong Kong exporters to global markets (103 SMBs, 102 Corporates)
Source for Internet Economy of Southeast Asia is "Google, Temasek and Bain, e-Economy SEA 2021" (<https://economysea.withgoogle.com/>)

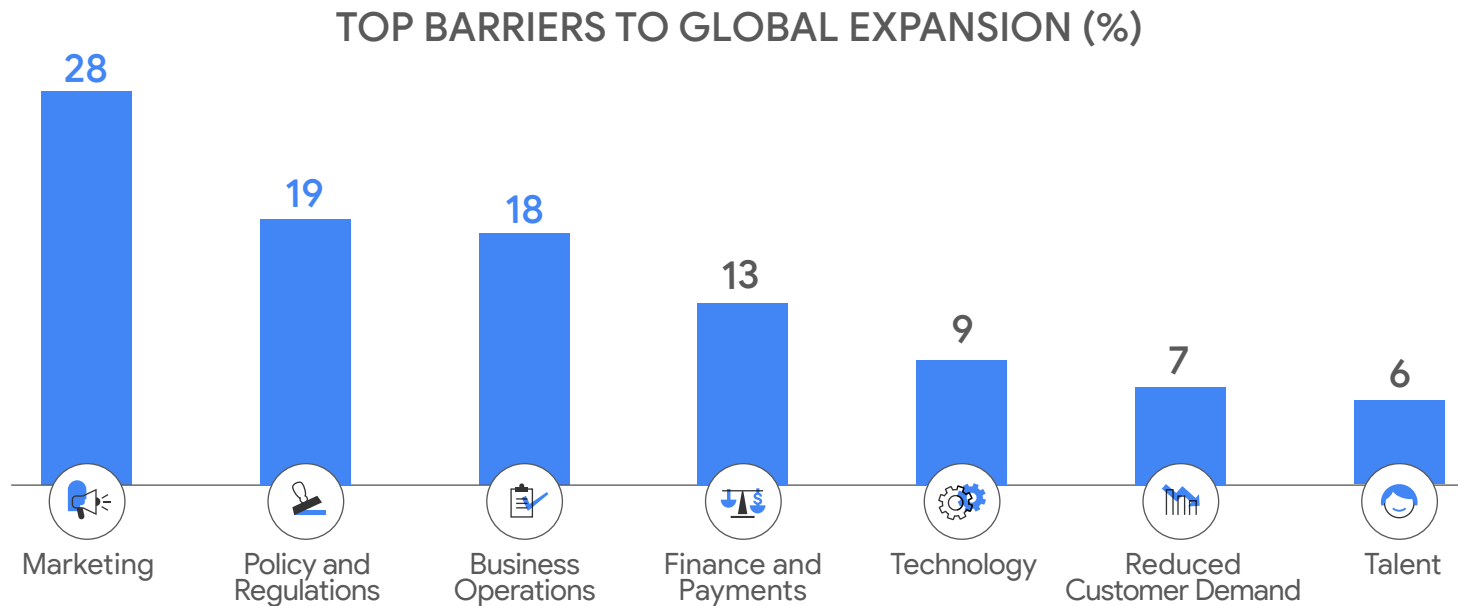
Key Finding 2

Exporters, particularly SMBs, need support to overcome key barriers. Exporters' top challenges are in marketing, policy and regulations, and business operations.





Marketing, policy and regulations, and business operations are top barriers to export globally. In particular, business operation barriers have been made worse by COVID-19.

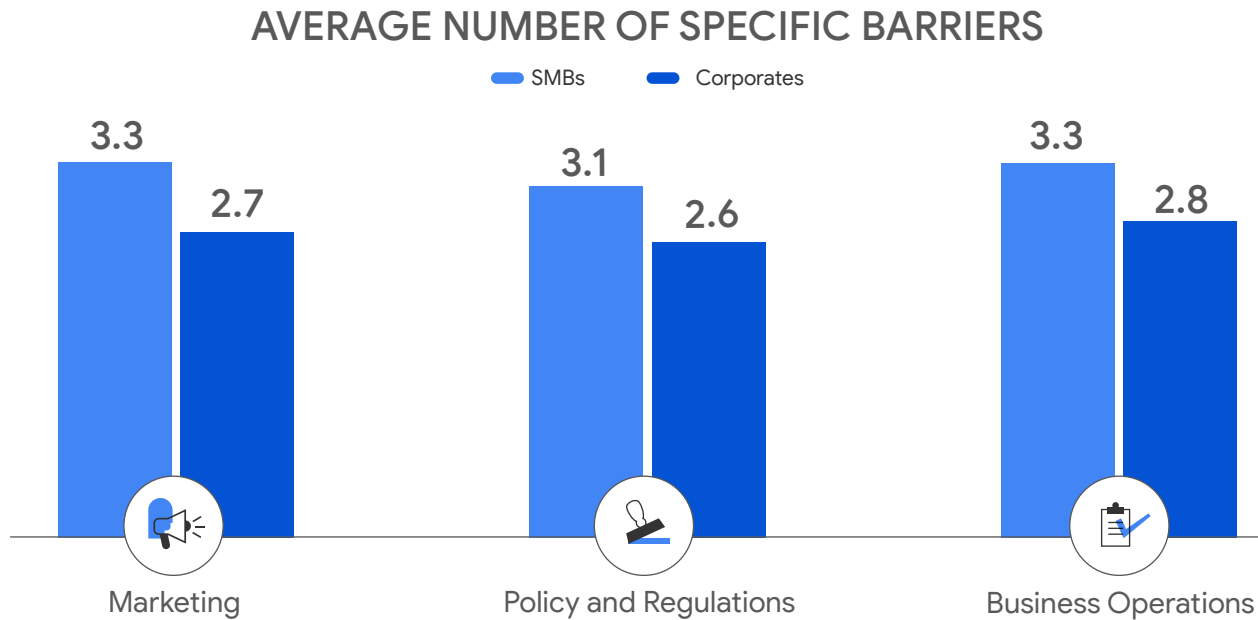
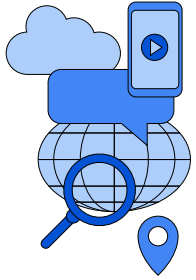


Question: Which of the following is the biggest barrier to you selling more globally?

Question: Of the issues you mentioned, which ones have been made worse by the COVID-19 pandemic?

Base: n=205 Hong Kong exporters to global markets

SMBs are more likely than Corporates to encounter barriers to exporting more.

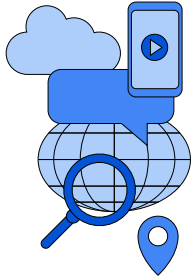


Question: Which of the following key [marketing / regulatory / business operation] issues prevent you from marketing and / or selling more globally?
Base: n=205 Hong Kong exporters to global markets (103 SMBs, 102 Corporates)

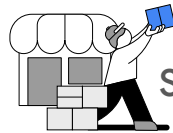


Top Barrier 1: Marketing

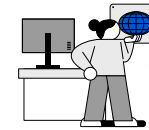
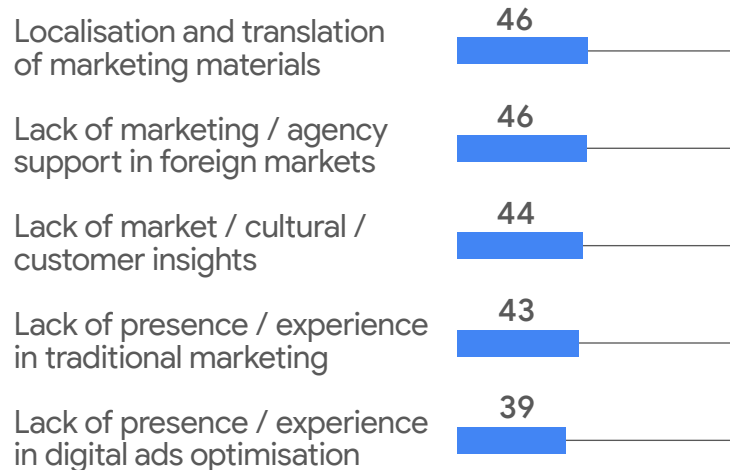
Exporters face marketing challenges in localisation, getting local insights, and using digital ads. SMBs, in particular, need more support from marketing agencies when going global.



TOP MARKETING BARRIERS (%)



SMBs



Corporates

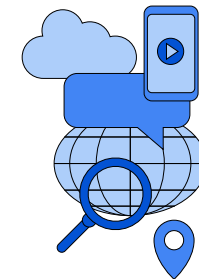


Question: Which of the following key marketing issues prevent you from marketing and / or selling more globally?
Base: n=205 Hong Kong exporters to global markets (103 SMBs, 102 Corporates)

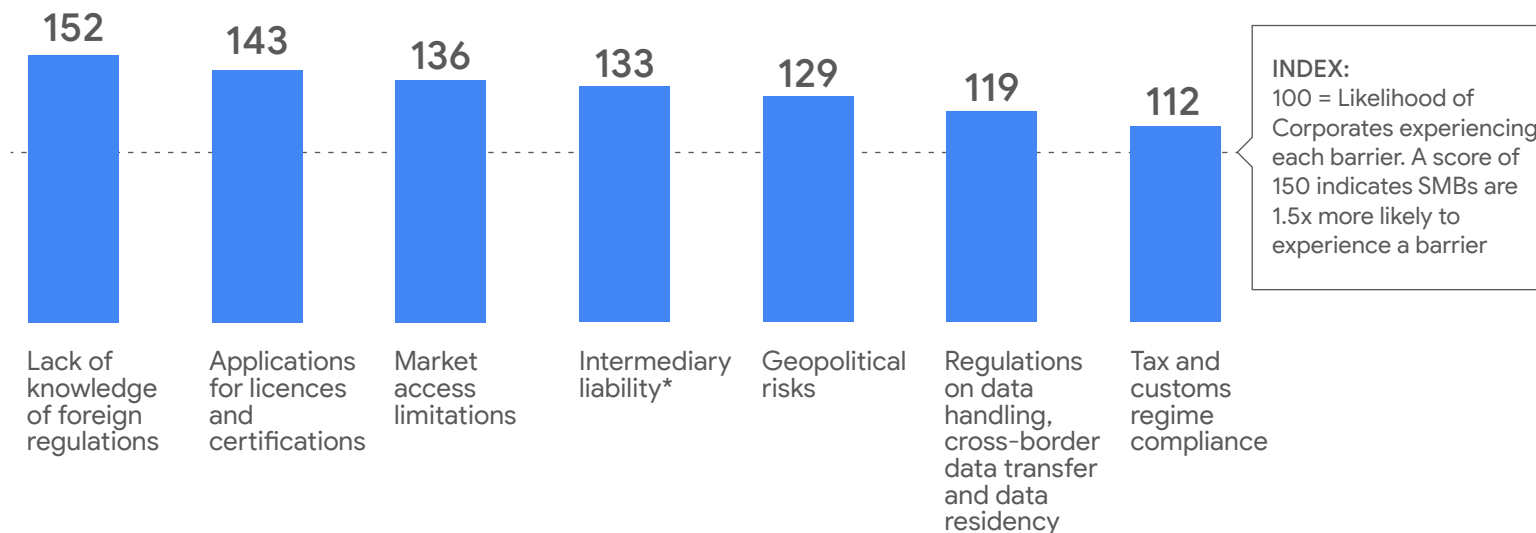


Top Barrier 2: Policy and Regulations

SMB exporters need more support in overcoming regulatory barriers.



SMB V.S. CORPORATE EXPORTERS FACING REGULATORY BARRIERS

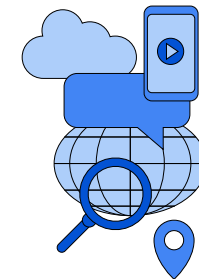


* Intermediary liability refers to whether Internet platforms hold direct legal responsibility for what their users do and say
Question: Which of the following key regulatory issues prevent you from marketing and / or selling more globally?
Base: n=205 Hong Kong exporters to global markets (103 SMBs, 102 Corporates)



Top Barrier 2: Policy and Regulations

It is crucial for SMBs and Corporates to gain access to accurate information on trade regulations and rules.



Foreign Regulations

“We can never be 100% clear about the local food safety regulation [in our export market]. Even our current local distributors are not aware of some regulations. Not until we submit our application do we then know what works and not.”

President of Global Sales and Marketing
of a well-known food exporter

Applications for Licences & Certifications

“We have 5 products in Hong Kong, but when we launch in export markets we may only launch only one of them to begin with. We need time to work on the licences and learn about the process.”

Co-founder of an SMB fintech service
provider

Data Residency & Cross-border Data Transfer

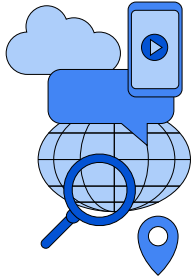
“Different data storage compliance and cross-border data transfer regulations in export markets make it challenging to export services.”

Co-founder of an SMB fintech service
provider

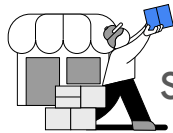


Top Barrier 3: Business Operations

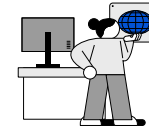
Building offshore partnerships and managing production abroad are difficult.



TOP BUSINESS OPERATIONS BARRIERS (%)



SMBs



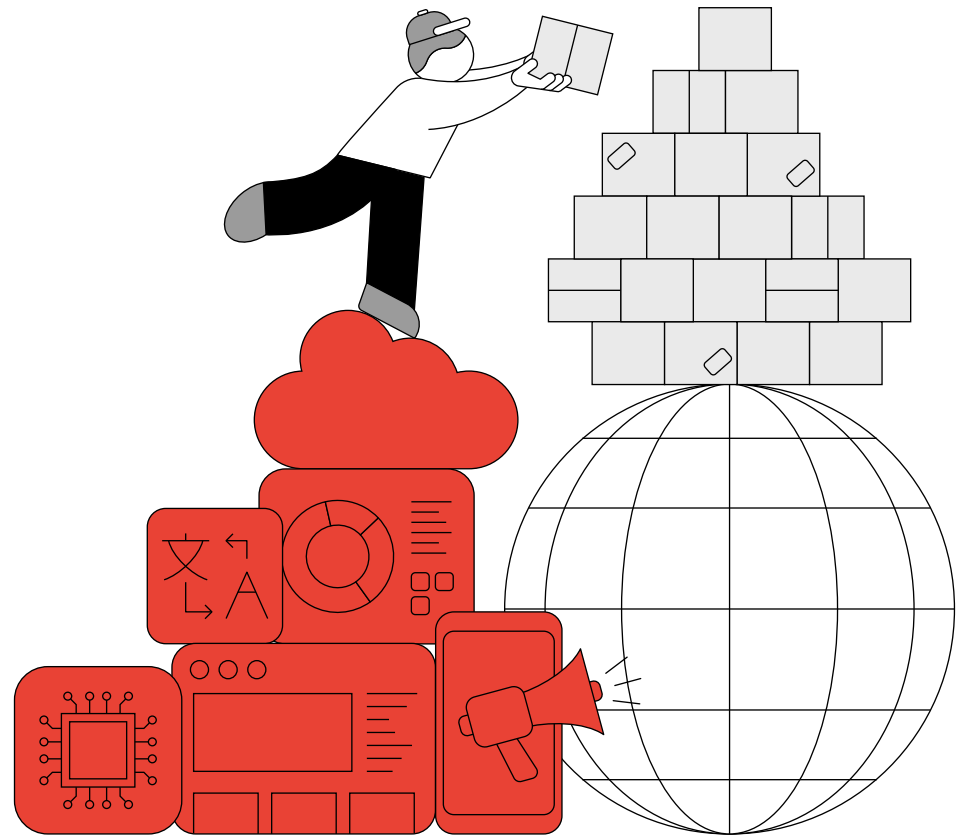
Corporates

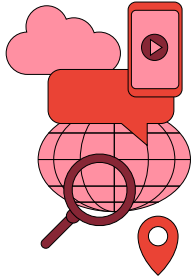


Question: Which of the following key business operation issues prevent you from selling more globally?
Base: n=205 Hong Kong exporters to global markets (103 SMBs, 102 Corporates)

Key Finding 3

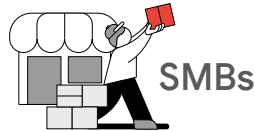
Exporters benefit from digital adoption. They plan to invest more in digital tools to increase market share and customer base as well as enhance their global branding. However, there is a need for digital upskilling.



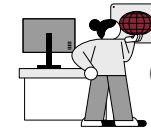
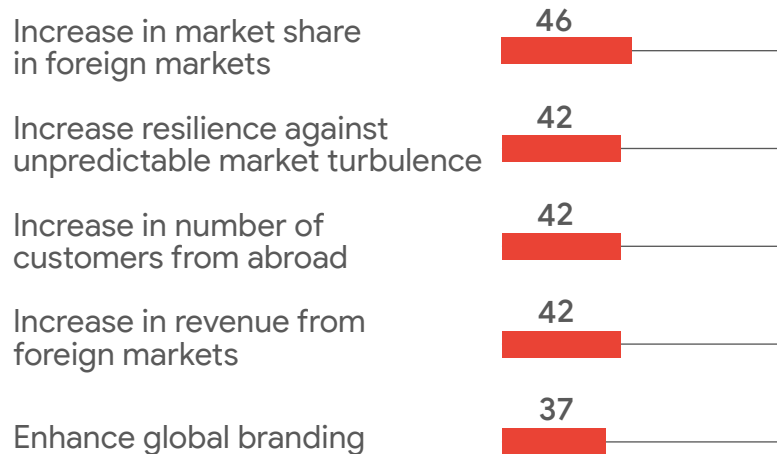


Digital tools help exporters increase market share and enhance global branding. They help SMBs increase resilience by diversifying revenue streams.

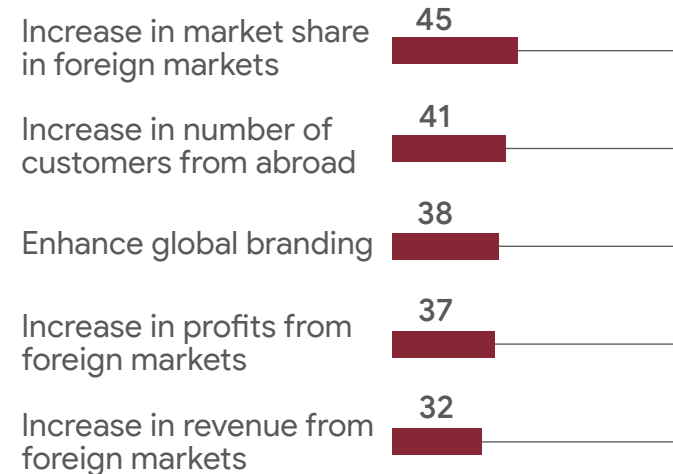
BENEFITS FROM DIGITAL TOOLS (%)



SMBs

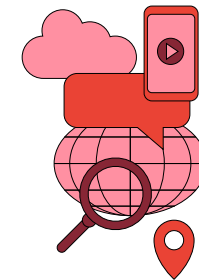


Corporates

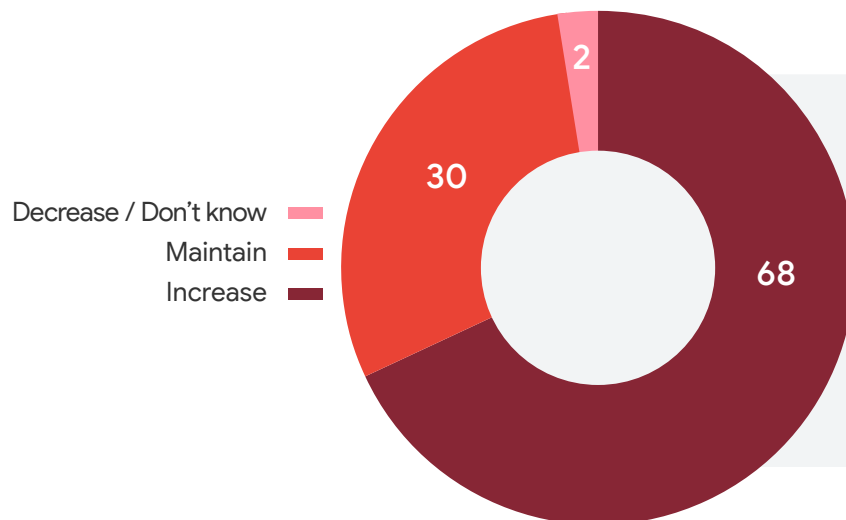


Question: What benefits do you get from the digital tools that you use in going global?
Base: n=205 Hong Kong exporters to global markets (103 SMBs, 102 Corporates)

68% of exporters plan to increase their investment in digital tools.



DIGITAL TOOL INVESTMENT IN 2022 (%)



9 out of **10** exporters who plan to grow digital investment next year are optimistic about growth

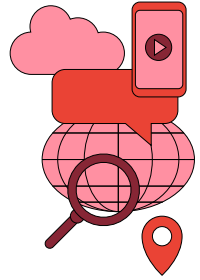


Question: Does your company plan to change how much it invests in digital tools that help you sell abroad in the next 12 months?

Question: Do you expect the share of your company's revenue that is sold abroad will increase or decrease over the next 12 months?

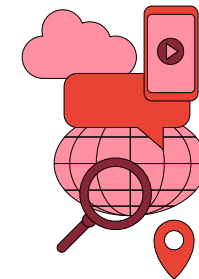
Base: n=205 Hong Kong exporters to global markets; n=140 Hong Kong exporters to global markets who plan to increase digital investments in next 12 months

The research investigated the use and need of digital tools along the export sales journey.



Market Research	Demand Generation	Confidence Building	Client Service	Loyalty
<p>Understand new customers and market opportunities:</p> <ul style="list-style-type: none">• E-learning websites• Online market research• Predictive analytics• Trade resources	<p>Build awareness to attract new customers from abroad:</p> <ul style="list-style-type: none">• Digital marketing• Marketplaces	<p>Build confidence for your prospects abroad to consider your products / services:</p> <ul style="list-style-type: none">• Background check• Digital marketing• Digital product demo• Online communications	<p>Service your clients abroad:</p> <ul style="list-style-type: none">• Cloud tools• Digital order fulfillment• Digital payment• Online communications• Productivity tools	<p>Enhance the relationship with your existing customers from abroad:</p> <ul style="list-style-type: none">• Big data analytics tools• Cloud tools• Social media monitoring

Being discovered is critical in today's business world. SMBs currently skew towards offline approaches to research foreign markets. But they express the desire to be educated on digital tools.



TOP 5 TOOLS

CURRENT ADOPTION

- E-learning websites
- Export market / country trade associations
- Field trips
- Industry trade associations
- Online market research

- B2C marketplaces
- Sales agents or affiliates in export markets
- Social media
- Trade shows
- Website building and localisation

- AR or VR displays
- Communication apps
- Email marketing
- Social media
- Verification of businesses via Map apps

EDUCATION NEEDS

- E-learning websites
- Export market / country trade associations
- Field trips
- Online market research
- Predictive analytics to forecast demand

- Display ads
- Email marketing
- Online / mobile video ads / live-streaming events
- Mobile app development
- Search ads

- Mobile app development
- Online / mobile video ads
- Search ads
- Social media
- Website building and localisation

Legend: ● Digital tools ○ Traditional tools

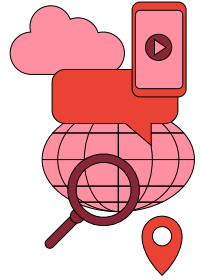
Question: When it comes to [understanding and attracting new customers from abroad to your company], which of the following tools do you use?

Question: Which of the following do you offer or use when you want to build confidence for your prospects abroad to consider your products / services?

Question: For which of the following [tools to understand and attract new customers from abroad / build confidence for your prospects abroad] do you feel you need more support and education?

Base: n=103 Hong Kong SMB exporters to global markets

Corporates mix offline and online approaches to drive sales. Even so, a more sophisticated understanding and use of digital marketing tools and analytics are needed in order to stay competitive globally.



TOP 5 TOOLS



CURRENT ADOPTION

- Export market / country trade associations
 - Field trips
 - Industry trade associations
 - Online market research
 - Predictive analytics to forecast demand
-
- B2C marketplaces
 - Personal introductions
 - Social media
 - Trade shows
 - Website building and localisation
-
- Communication apps
 - Customer hotline / Referrals / Traveling to have meetings
 - Hosting events or seminars
 - Live-streaming events
 - Social media

EDUCATION NEEDS

- E-learning websites
 - Export market / country trade associations
 - Field trips
 - Online market research
 - Predictive analytics to forecast demand
-
- Email marketing
 - Online / mobile video ads / live-streaming events
 - Search ads
 - Social media
 - Website building and localisation
-
- Display ads
 - Email marketing
 - Online / mobile video ads
 - Social media
 - Website building and localisation

Legend: ● Digital tools ○ Traditional tools

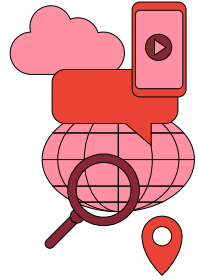
Question: When it comes to [understanding and attracting new customers from abroad to your company], which of the following tools do you use?

Question: Which of the following do you offer or use when you want to build confidence for your prospects abroad to consider your products / services?

Question: For which of the following [tools to understand and attract new customers from abroad / build confidence for your prospects abroad] do you feel you need more support and education?




Base: n=102 Hong Kong Corporate exporters to global markets

Both SMBs and Corporates find cloud-based solutions including data analytics and productivity tools to be crucial in servicing their clients and enhancing customer loyalty.





TOP DIGITAL TOOLS FOR SMBs & CORPORATES

MOST HELPFUL

-  Cloud tools (e.g. big data analytics)
-  Online productivity tools (e.g. online spreadsheet, online file sharing)
-  Big data analytics on customer information

EDUCATION NEEDS

- Online job platforms to recruit talents
- RFID (Radio-Frequency Identification) tracking
-  Artificial intelligence for product personalisation
-  Big data analytics on customer information

Legend:  Denotes cloud-based solutions • Denotes other digital solutions

Question: Which one of these do you find most helpful to [service your clients abroad / enhance the relationship with your existing customers from abroad]?

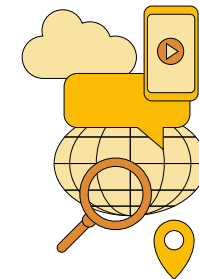
Question: For which of the following tools [used to service your clients abroad / enhance your relationship with your existing clients abroad] do you feel you need more support and education?

Base: n=205 Hong Kong exporters to global markets (103 SMBs, 102 Corporates)

Recommendations



Hong Kong exporters can overcome key export barriers by leveraging digital tools.



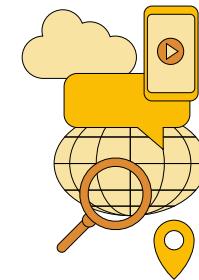
Export is a competitive edge of the Hong Kong economy and has been one of the key elements that is helping Hong Kong recover during an extended pandemic. The expansion of sales to include foreign markets can help in diversification of revenue streams, as well as allowing export companies to benefit from higher revenues and profit margins.

Small and medium-sized business (SMB) exporters should take advantage of how digital tools have lowered barriers to entry. These digital tools have allowed SMBs to increase their resilience against market uncertainty, increase revenue, expand the customer base and enhance global branding.

Corporate exporters should use digital tools to explore or deepen their export businesses as digital tools enable Corporates to raise margins and sustain / increase annual growth rate.

By leveraging digital tools, exporters could overcome many of the key barriers.

Upskilling in digital tools is a common need that has emerged among exporters.



Marketing & Sales

- Being found on digital platforms is critical in today's business world, but it's only the first step. With websites built, exporters can better understand their customers with data analytics and facilitate sales with more ad formats and features
- Exporters could expand to more new markets and get more customers by using online insights tools and digital advertising
- Marketing agencies shall also upskill their digital capabilities for foreign markets in order to partner with SMB exporters

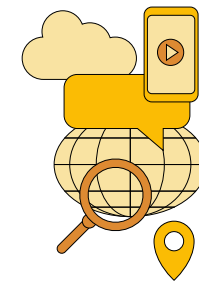
Regulatory Requirements

- Exporters should seek information on foreign regulations, licences or certification requirements etc. from authoritative sources (e.g. trade associations, chambers of commerce)
- To deep dive into the relevant insights, exporters can also do market research by seeking the relevant information, news, and insights from trusted online sources

Business Operations

- Exporters can further invest in cloud tools to gain insights with real-time and predictive analytics that would inform business decisions and better serve their customers
- Online productivity tools can help staff and partners across markets to work collaboratively to overcome key challenges to export
- The importance of privacy and security makes it crucial to be digitally responsible. Businesses should look into cybersecurity technologies and choose trusted cloud services in order to meet regulatory requirements

Trade ecosystem players can support exporters to succeed in global markets through digital trade initiatives.



Trade Regulations

- Key public and industry organisations should provide more guidance to exporters on how best to address foreign regulations. The compilation of accurate online resources on trade regulations and rules in foreign markets, such as from international organisations like the World Trade Organization, will help direct exporters to address regulatory requirements for trade and enable them to plan the resources required for export
- The establishment of Hong Kong government offices and / or partnerships in key export markets may provide on-the-ground support for Hong Kong businesses looking to enter those markets, and promote Hong Kong as a reliable source of goods and services

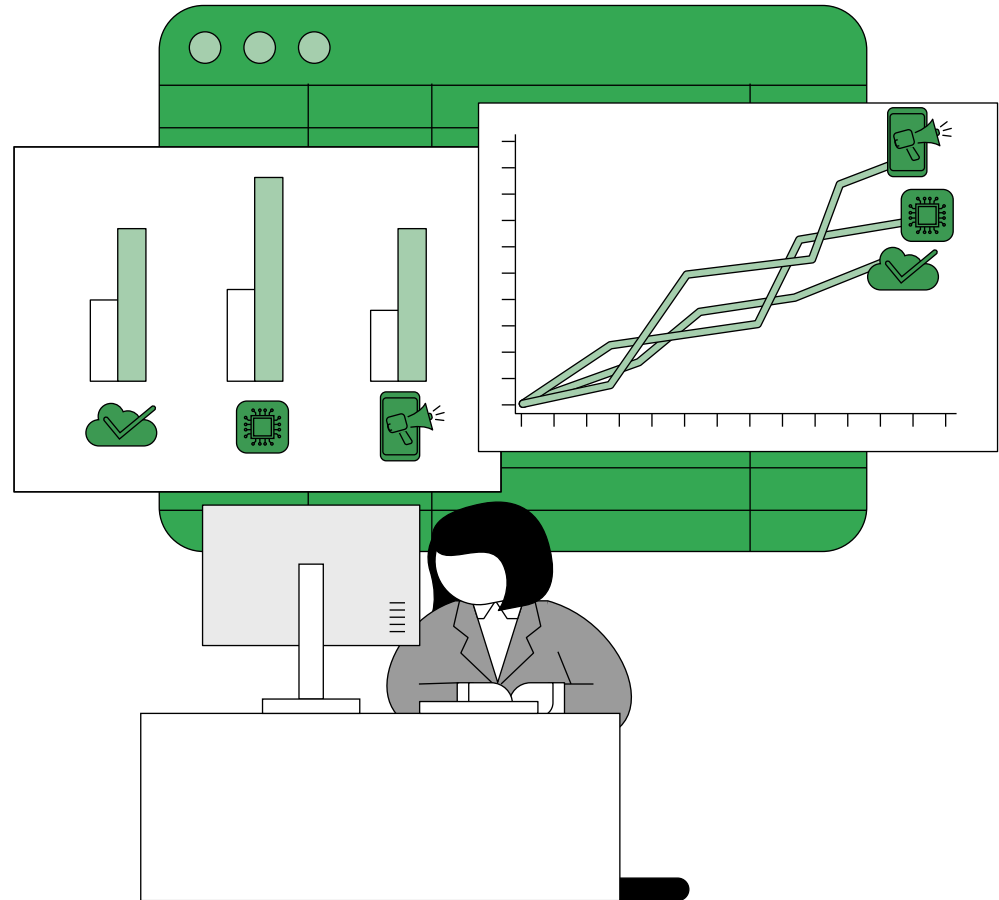
Licences / Certifications and Market Access

- The expansion of Hong Kong's network of free trade agreements will open up new market access opportunities and reduce non-tariff trade barriers

Data Residency and Cross-border Data Transfer

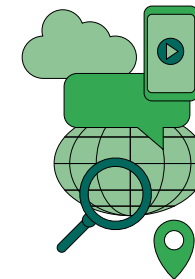
- Policymakers should establish digital economy partnership agreements with key trading partners that will help exporters ensure that data can flow freely across borders in a secure and privacy-protective manner
- This should be coupled with the ongoing active negotiation of global digital trade rules at the World Trade Organization, so as to ensure that Hong Kong businesses' own digital interests are promoted

Reference



Methodology

Research Overview



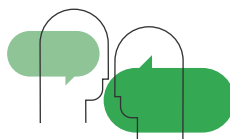
Key Contents Covered

- Triggers and barriers for Hong Kong businesses going global particularly among small and medium-sized businesses
- Where Hong Kong exporters need most support and education, with a focus on digital tools
- Recommendations for businesses and ecosystem players to capture the export opportunities via digital tools

Research Approach

Google commissioned Ipsos to conduct Hong Kong exporter interviews via phone or video conferencing from September 28, 2021 to November 2, 2021 and online surveys among Hong Kong exporters from November 19 to 26, 2021

In-depth Interviews n=10 Participants (60 minutes)



with Hong Kong exporters* to global markets (mix of SMBs vs. Corporates, services exporters vs. commodity exporters)

Online Survey n=205 Participants (20 minutes)

SMBs
 **n=103**
Hong Kong SMB**
exporters to global markets

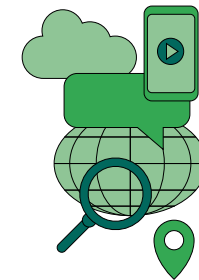
Corporates
 **n=102**
Hong Kong Corporate**
exporters to global market

* Exporters are businesses that export to global markets including commodities (e.g. electronics, food & beverages) and / or services (e.g. finance services, logistics).

** According to the Trade and Industry Department of the Hong Kong government, small and medium-sized businesses (SMBs) in Hong Kong refer to manufacturing firms which employ fewer than 100 persons in Hong Kong, or non-manufacturing firms which employ fewer than 50 persons in Hong Kong. Corporates refer to manufacturing firms with at least 100 people employed in Hong Kong, or non-manufacturing firms with at least 50 people employed in Hong Kong.

Methodology

Exporter Profile in This Survey



Survey Respondents

n=205 Hong Kong companies that export commodities or services to global markets outside Hong Kong, Mainland China, Taiwan or Macau (including n=133 re-exporters who bring goods or services through Hong Kong for re-export to global markets)

Participant Role

Individuals who take a lead role in sales or marketing of exports, such as business owners, global / regional / Hong Kong heads, heads of business units and directors

Merchandise Exporters

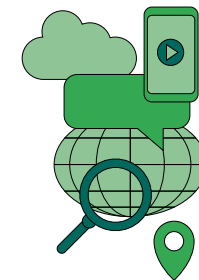
n= 194 who export commodities (including n=83 who only export commodities and not services; mostly electronics, clothing or textiles, toys and games)

Services Exporters

n=122 who export services (mix of exporters in financial services, transport services, telecommunications services, travel and tourism services)

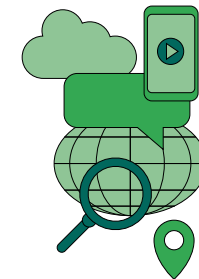
Appendix

Digital Tools Surveyed by Alphabetical Order



Market Research	Demand Generation	Confidence Building	Client Service	Loyalty
<ul style="list-style-type: none"> • E-learning websites • Online market research to get market / consumer insights • Predictive analytics to forecast demand 	<ul style="list-style-type: none"> • B2B marketplaces • B2C marketplaces • Display ads • Email marketing • Live-streaming events • Mobile app development • Online / mobile video ads • Search ads • Social media • Website building and localisation 	<ul style="list-style-type: none"> • Artificial intelligence for fraud / bot detection • Augmented or virtual reality (AR or VR) displays • Communications apps • Display ads • Email marketing • Live-streaming events • Mobile app development • Online / mobile video ads • Online / mobile video product demos • Proprietary chat tools • Search ads • Social media • Verification of businesses via map apps • Video conferencing • Virtual trade shows • Webinars • Website building and localisation 	<ul style="list-style-type: none"> • Artificial Intelligence to track shipments or optimise route deliveries • Cloud tools (e.g. big data analytics) • Cross-border digital payments • Cryptocurrency • Digital payments to affiliates within the same country / region • Electronic invoicing • Electronic signature verification on contracts • Electronic submission of regulatory information • Online channels for trade insurance • Online customer chat service or chatbots • Online job platforms to recruit talents • Online productivity tools (e.g. online spreadsheet, online file sharing) • RFID (Radio-Frequency Identification) tracking • Remote monitoring of production process • Smart contracts • Smart translation tools • Supply chain automation • Text, image or voice recognition tools 	<ul style="list-style-type: none"> • Artificial intelligence for product customisation / personalisation • Big data analytics on customer information • Cloud services to store / use customer information • Cybersecurity technology for protection of customer information • Monitoring of social media comments and reviews in your export markets • Suggest personalised recommendations to customers based on previous purchase • Use of cloud services for regulation compliance

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Scarlet Wong
Consultant, Hong Kong

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Engagement Manager, Hong Kong

Note: In alphabetical order by surname



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