NEW ZEALAND STORY

NEW ZEALAND
STORY

2022

MAKING NEW ZEALAND FAMOUS FOR MORE GOOD THINGS

Me.

a.k.a. A desperate attempt to establish credibility.

NEW ZEALAND STORY

THE UNIVERSITY OF AUCKLAND
NEW ZEALAND

icehouse

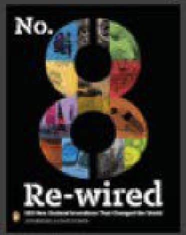
Te Tari Taiwhenua
Internal Affairs

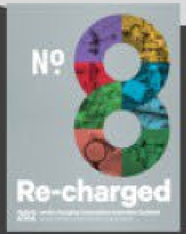
venture
TARANAKI

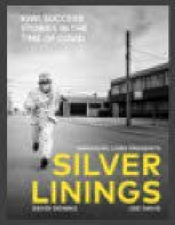
MALAGHAN INSTITUTE OF MEDICAL RESEARCH

WELL FOUNDATION.

NZ HI-TECH TRUST







NEW ZEALAND OVERVIEW

POPULATION
5,127,200
December 2021

UNEMPLOYMENT
3.2%
December 2021
quarter

GDP (NZ$)
$350 billion
December 2021

GDP GROWTH
3.0% (quarterly)
5.6% (annual)
December 2021

LIFE EXPECTANCY
82 years old

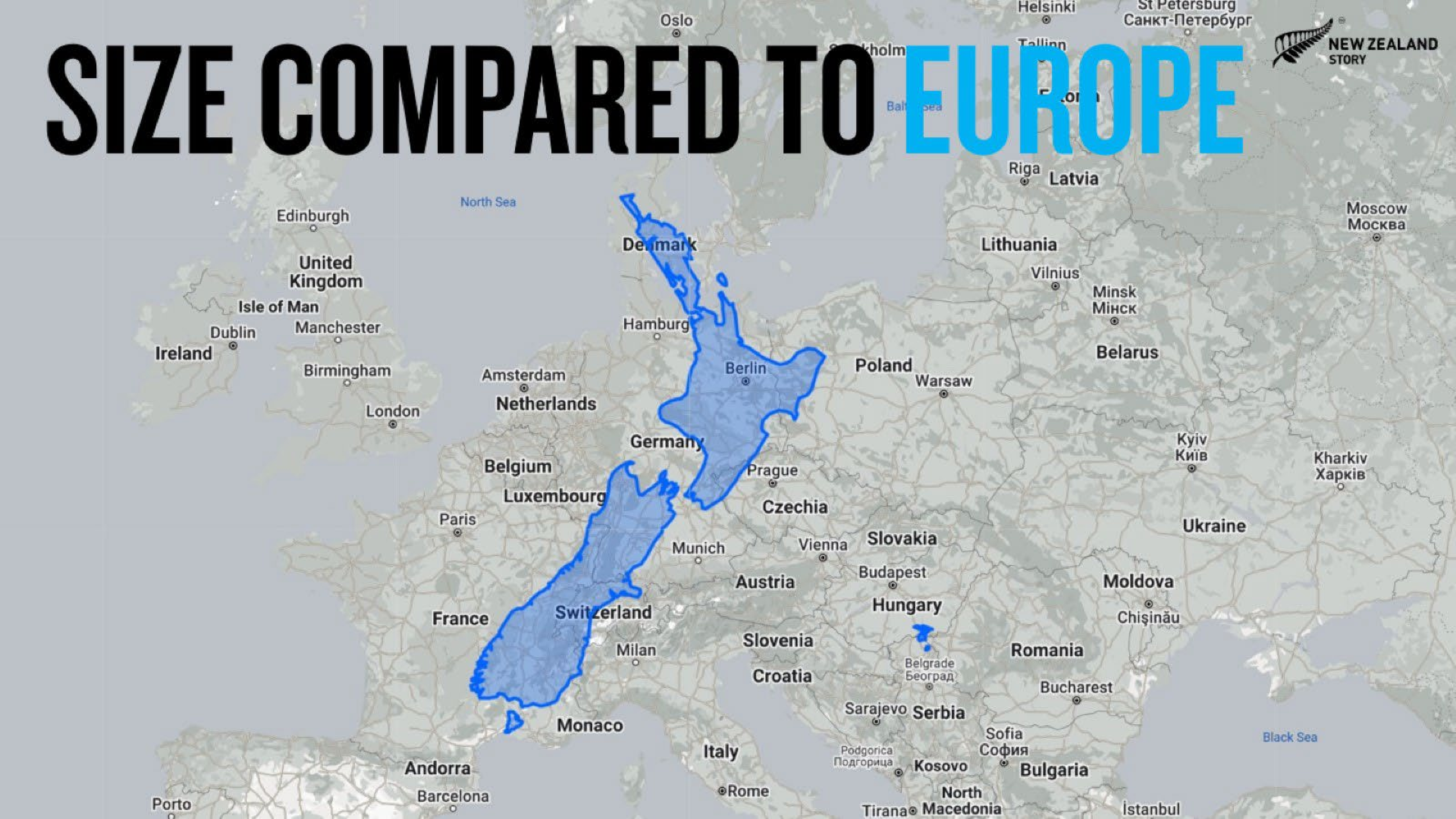
TOTAL IMPORTS (NZ$)
$85.4 billion
Year ended December 2021

TOTAL EXPORTS (NZ$)
$77.2 billion
Year ended December 2021

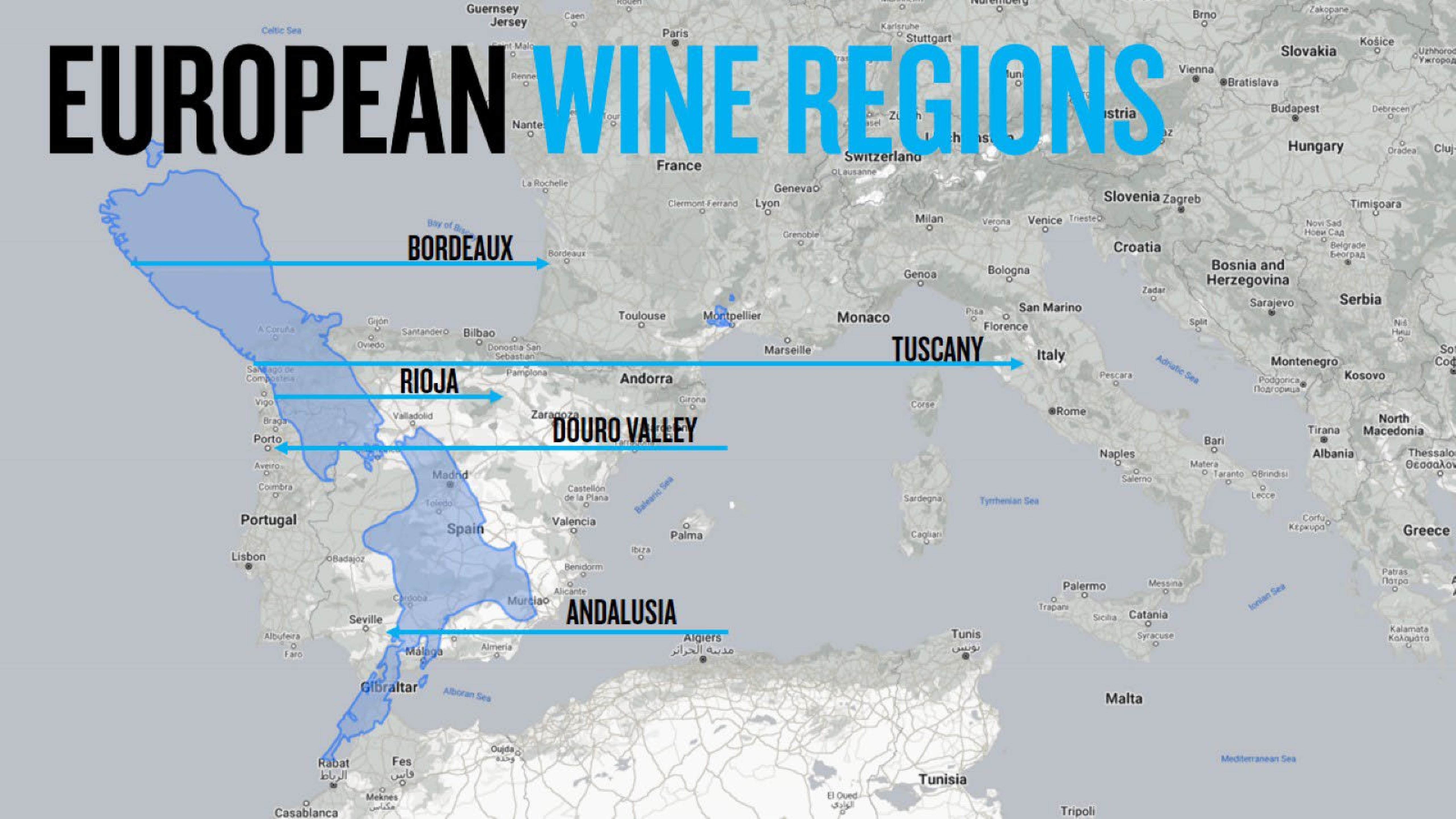
TWO-WAY TRADE (NZ$)
$163.6 billion
Year ended December 2021

SIZE COMPARED TO EUROPE

NEW ZEALAND STORY

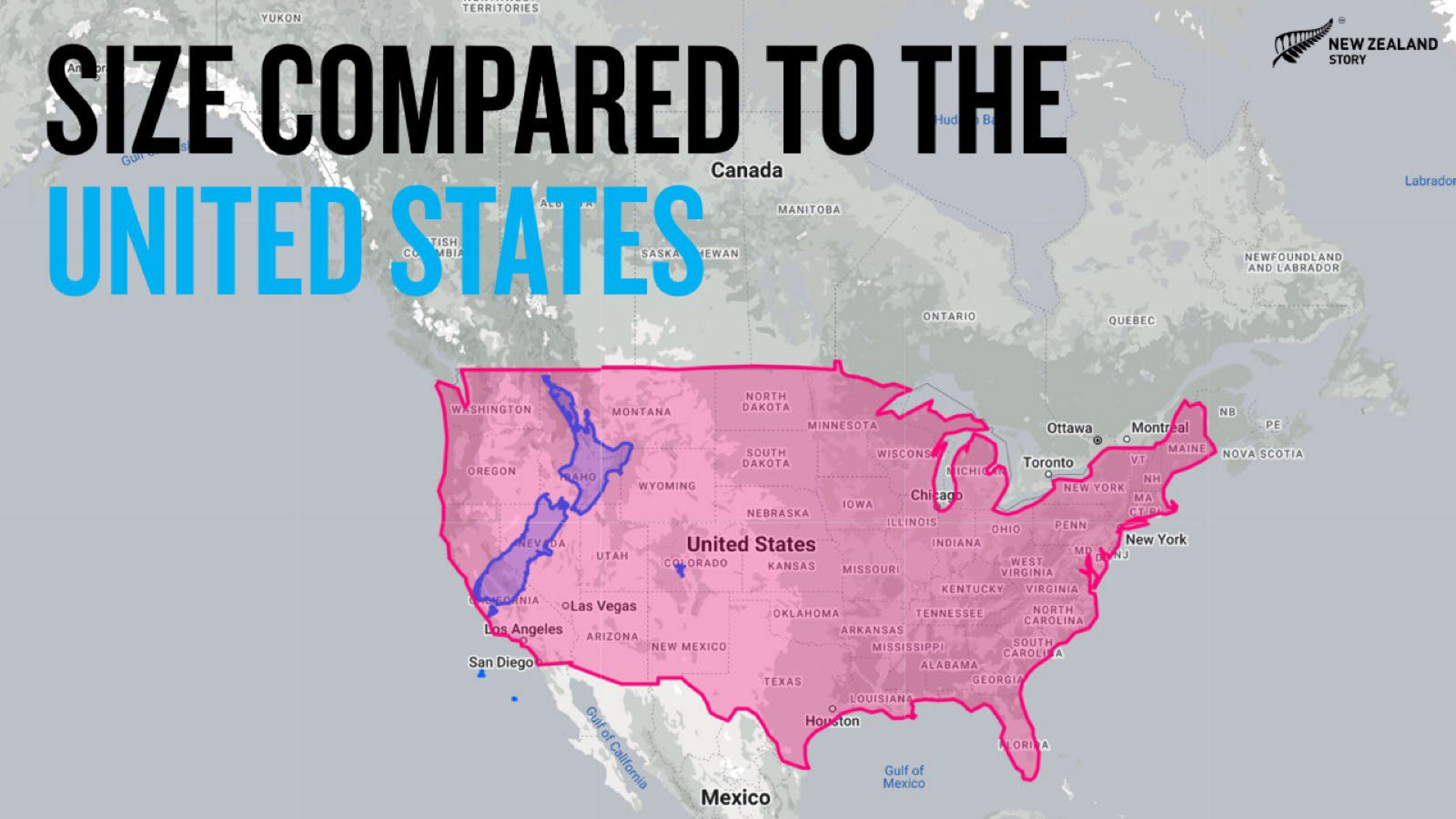


EUROPEAN WINE REGIONS



SIZE COMPARED TO THE UNITED STATES

NEW ZEALAND STORY



SIZE COMPARED TO ASIA

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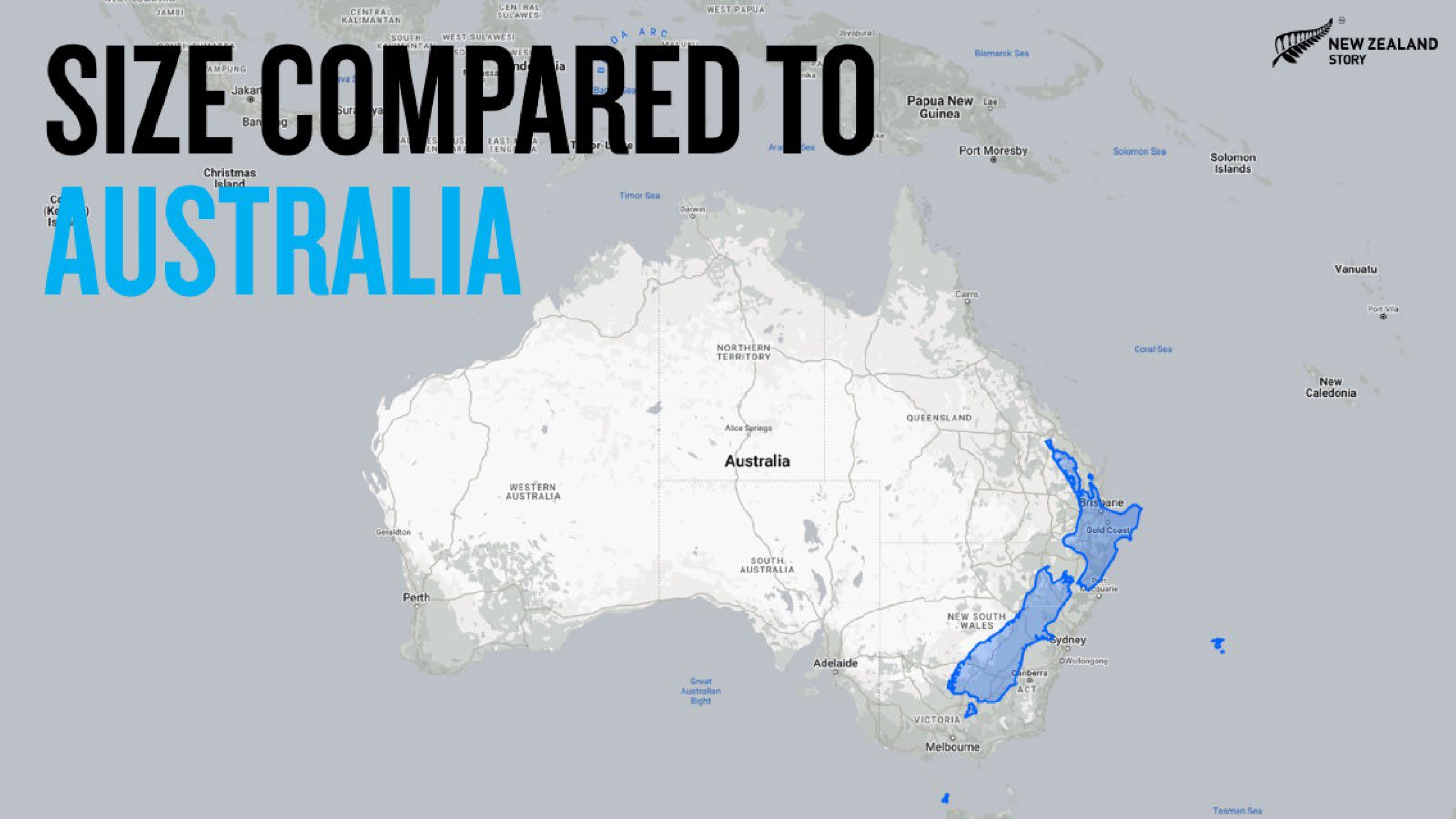
SIZE COMPARED TO SOUTHEAST ASIA

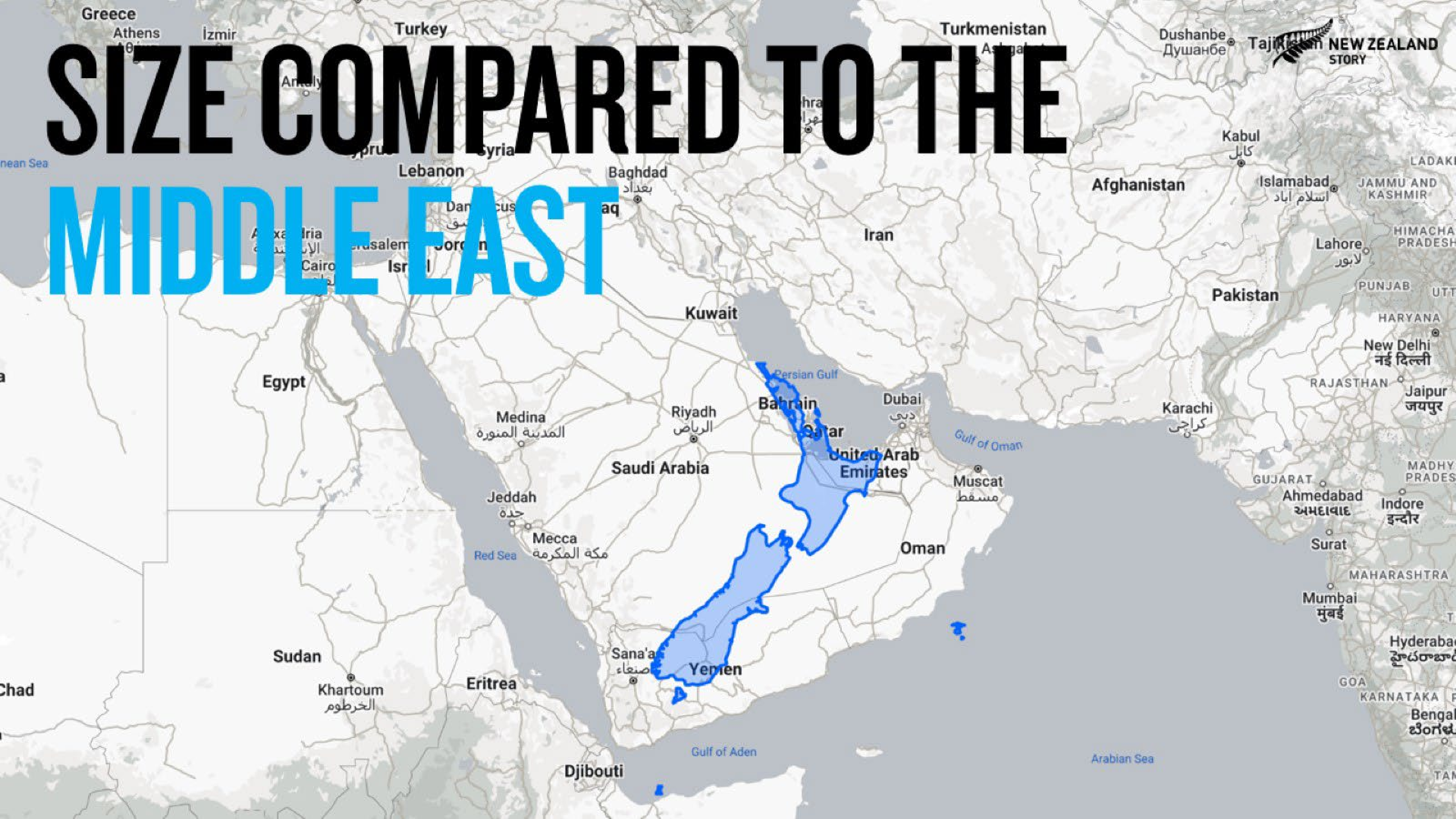
SIZE COMPARED TO AUSTRALIA



SIZE COMPARED TO JAPAN

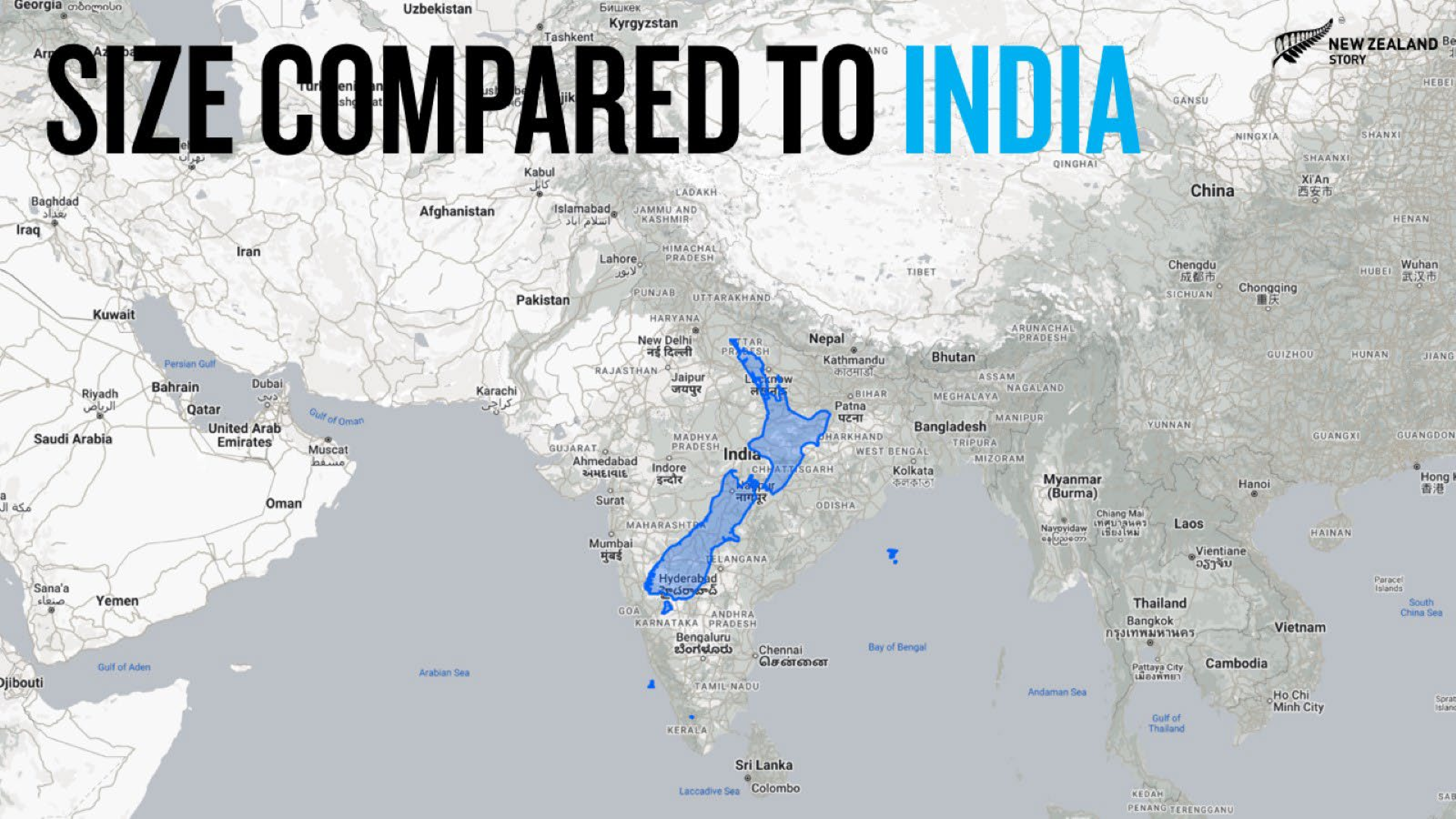
NEW ZEALAND STORY

SIZE COMPARED TO THE MIDDLE EAST



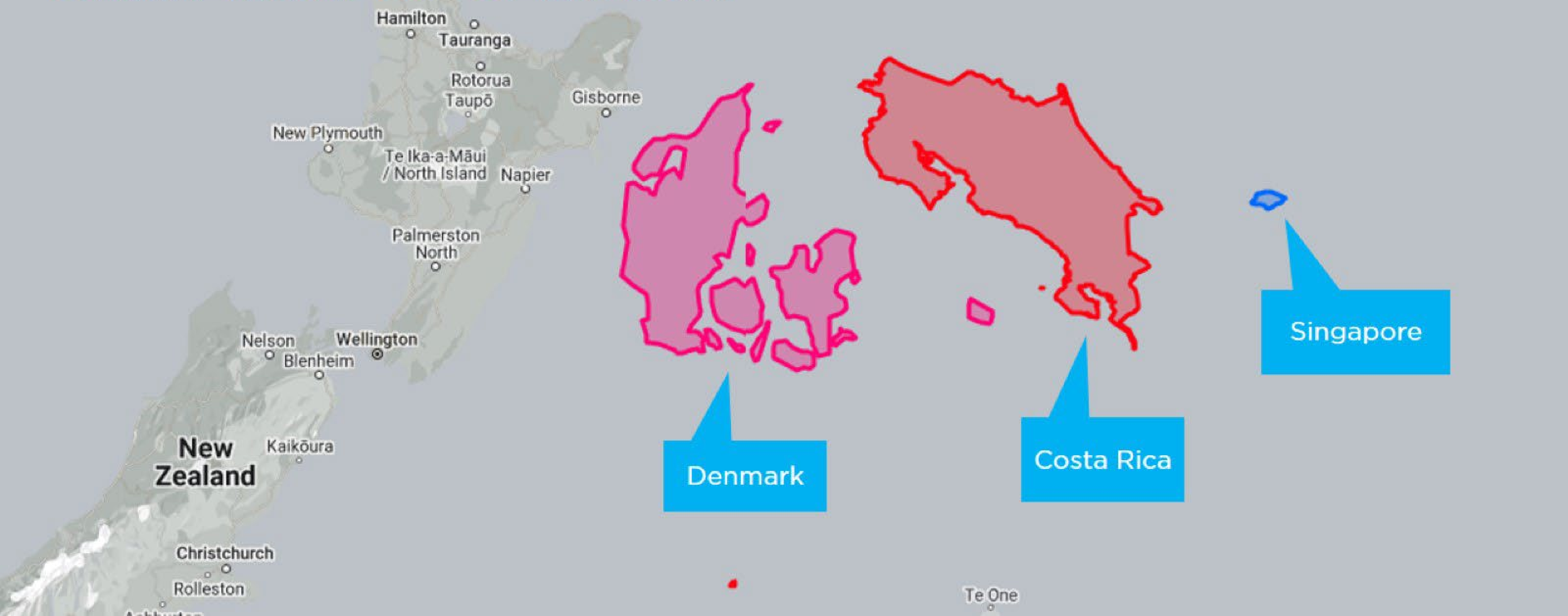
SIZE COMPARED TO INDIA

NEW ZEALAND STORY



SIZE COMPARED TO COUNTRIES OF

SIMILAR POPULATION



EXCLUSIVE ECONOMIC ZONE

NEW ZEALAND STORY

4.4 MILLION KM²

Exclusive Economic Zone (EEZ), extending 200 miles offshore

4th LARGEST

in the world, making it an ocean territory superpower

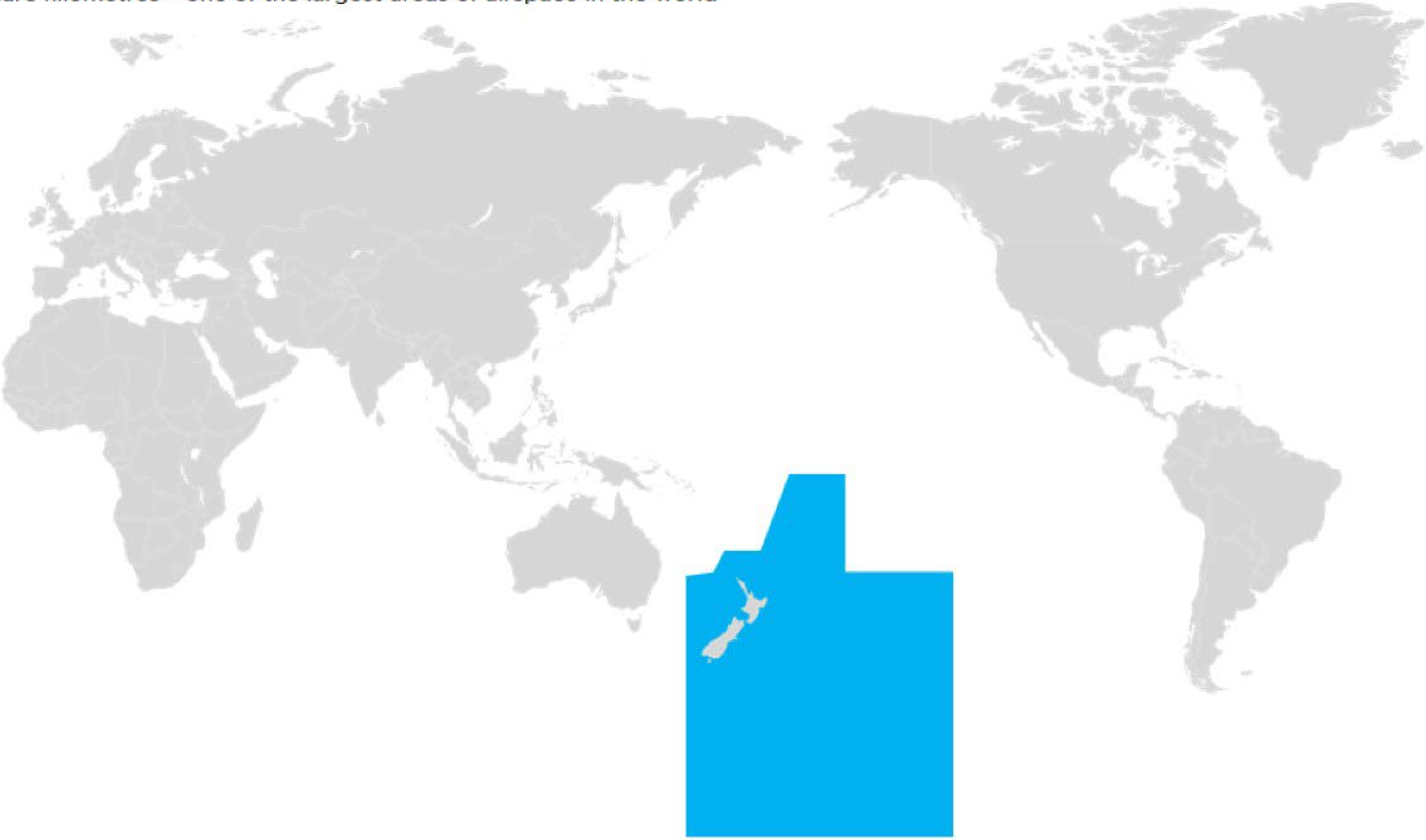
30%

of the EEZ is protected from fishing

NEW ZEALAND AIRSPACE

NEW ZEALAND STORY

30 million square kilometres – one of the largest areas of airspace in the world



THE NEW ZEALAND SPACE INDUSTRY

NEW ZEALAND STORY

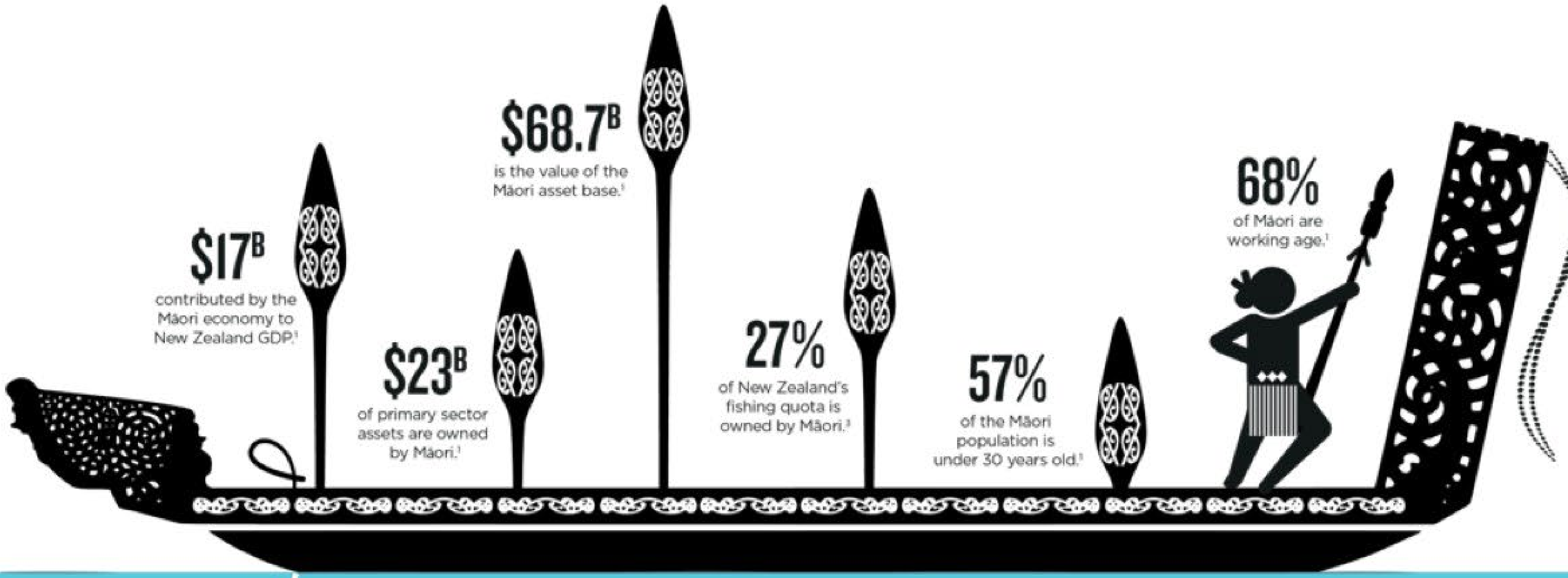
4th LARGEST
space player in the world

11th COUNTRY
to put a satellite into orbit

$1. 75 BILLION
revenue in 2018-19

240 SPACE-RELATED COMPANIES
in New Zealand

THE MĀORI ECONOMY



1. Reserve Bank of New Zealand, Te Ōhanga Māori, The Māori Economy, 2018
2. Statistics New Zealand, 2013 Census
3. Seafood New Zealand, 2022

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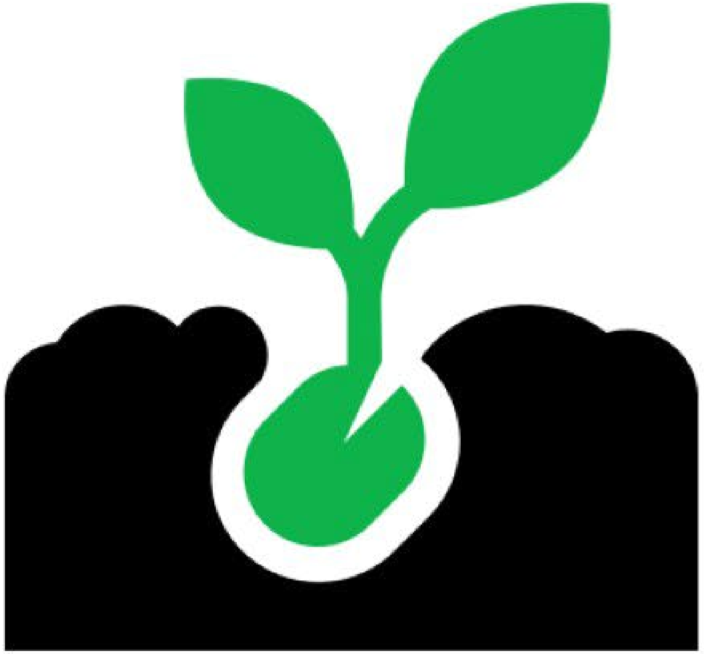
THE NEW ZEALAND SEED INDUSTRY



4th largest exporter of seeds in the world

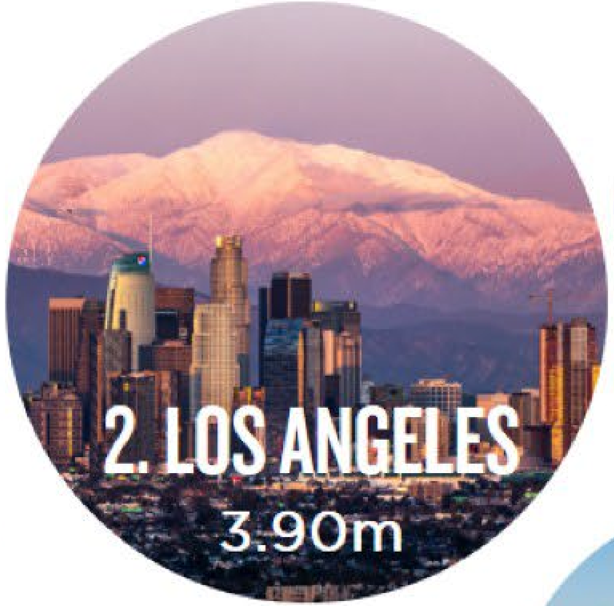
60% of the world's carrot seed

50% of the world's radish seed
of the world's clover seed

IF AUCKLAND WAS IN THE US

NEW ZEALAND STORY

It would be the fifth most populated city – behind Houston, TX and ahead of Phoenix, AZ



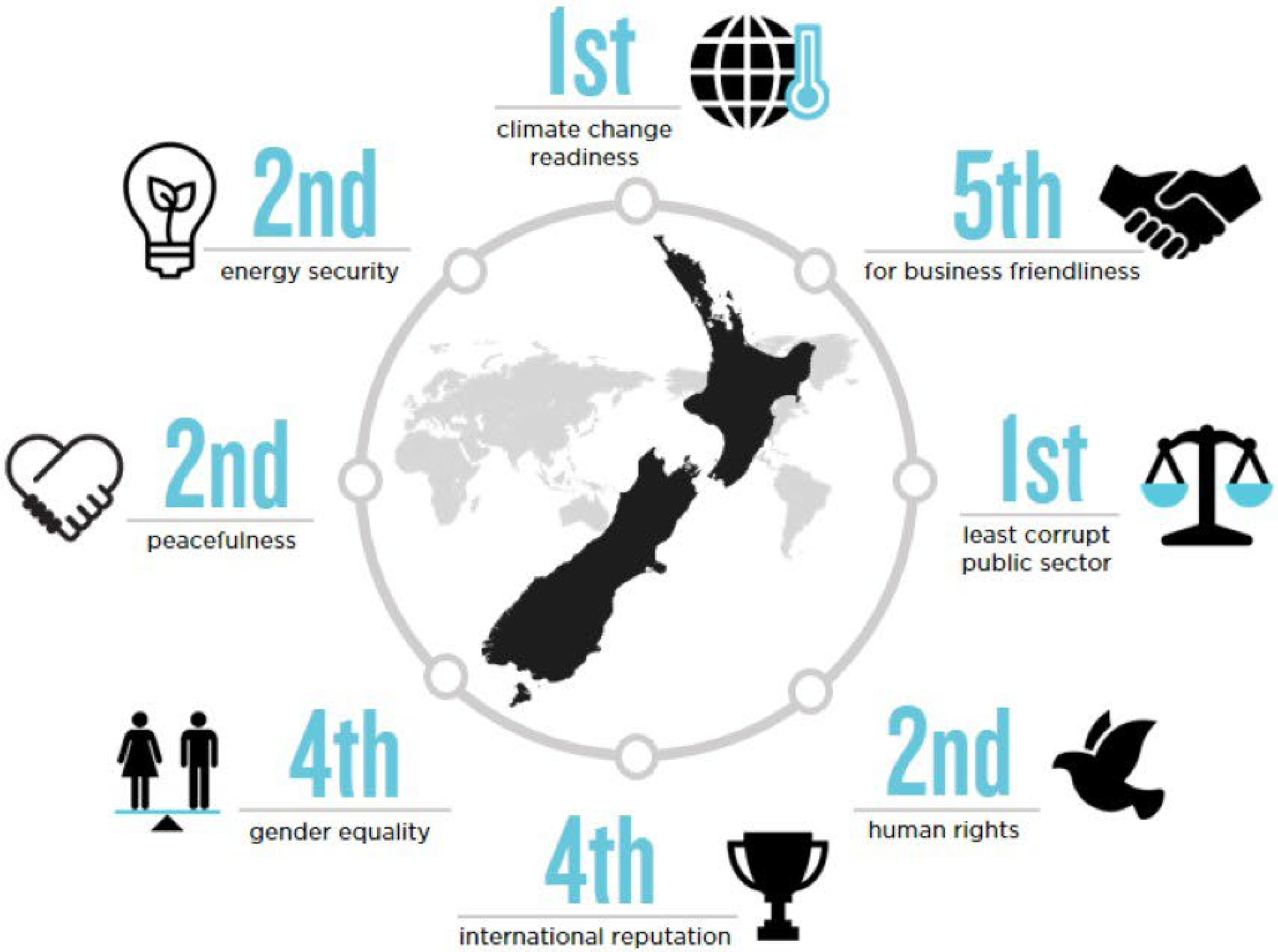
United States census & Statistics New Zealand

IF AUCKLAND WAS IN THE UK

It would be the fourth most populated city – behind London, Manchester and Birmingham

CityMonitor.ai & Statistics New Zealand

NEW ZEALAND RANKINGS



NEW ZEALAND DEMOCRACY

NEW ZEALAND STORY

New Zealand is the world's third oldest democracy...

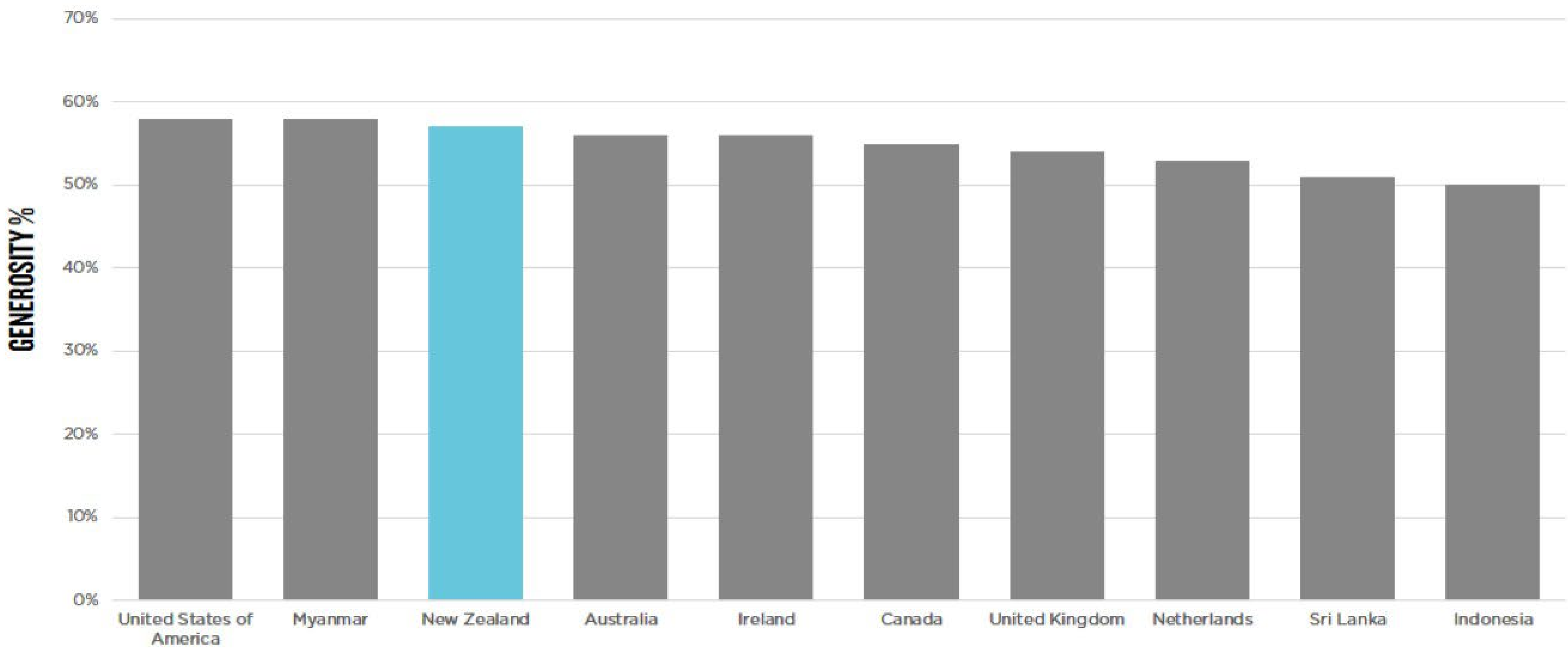
1789	1848	1857
United States	Switzerland	New Zealand

...But for true democracy (universal suffrage), in 1893 New Zealand was **first in the world** to allow all women and ethnicities to vote in elections.

GENEROUS COUNTRIES

NEW ZEALAND STORY

The world's highest scoring countries over 10 years (aggregate)



2019, Charities Aid Foundation (CAF) World Giving Index

NEW ZEALAND STORY

WHO IS NEW ZEALAND STORY?

NZ INC

NEW ZEALAND STORY

Inspire, curate and amplify storytelling

NEW ZEALAND TOURISM	NEW ZEALAND EDUCATION	NEW ZEALAND TRADE & ENTERPRISE Te Taurapa Tūhono	NEW ZEALAND FOREIGN AFFAIRS & TRADE Manatū Aorere	Ministry for Primary Industries Manatū Ahu Matua	Te Puni Kōkiri MINISTRY OF MĀORI DEVELOPMENT	MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT HĪKINA WHAKATUTUKI
Bring visitors to New Zealand	Bring students to New Zealand	Exports from, and Investment into New Zealand	Protect New Zealand's international relations	Protect New Zealand's Food Sector	Grow New Zealand's Māori Economy	Grow New Zealand's Economy

NEW ZEALAND STORY

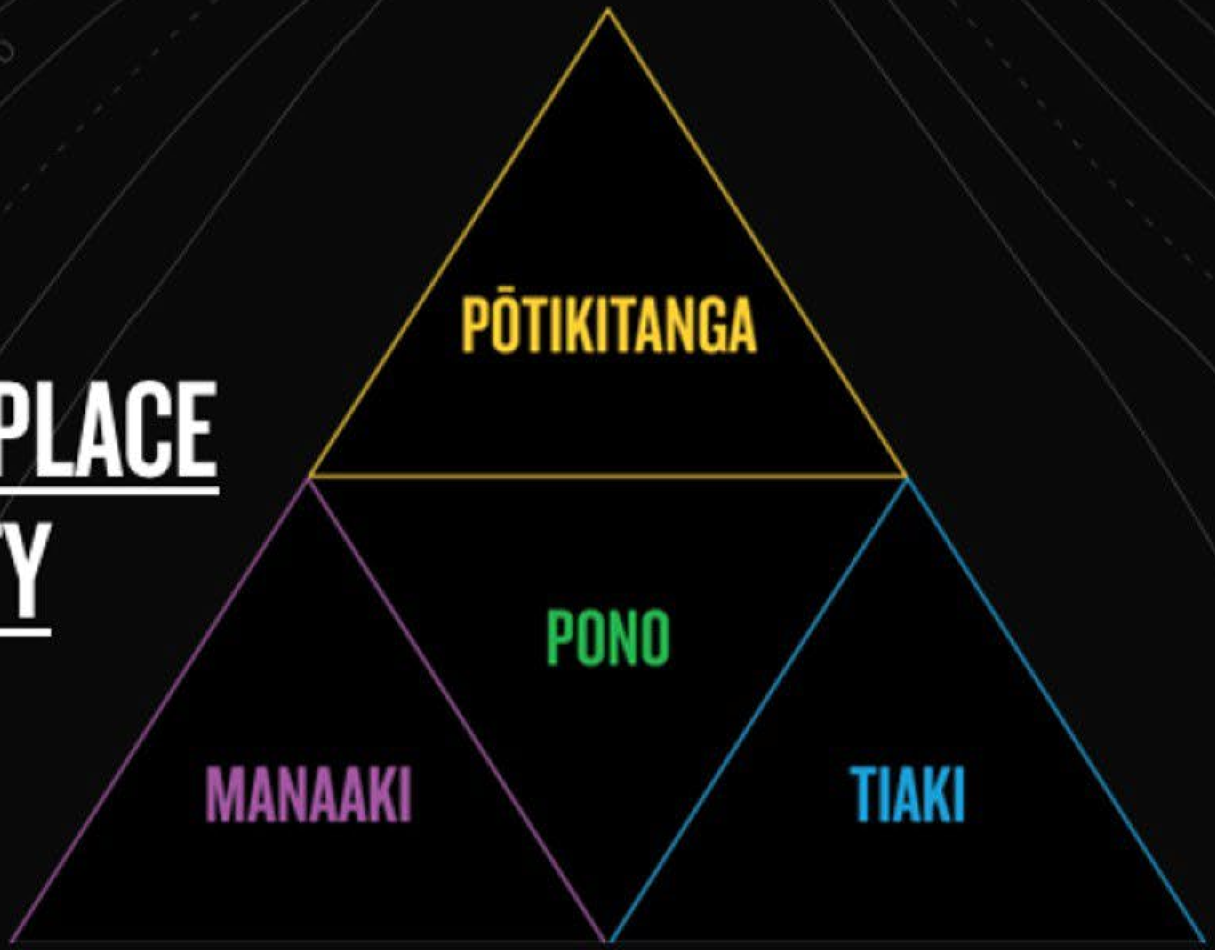
WHAT IS OUR NEW ZEALAND STORY?

Our country's narrative is built on international perception research and underpinned by values that define us as people and as a country. The more the world knows about these, the greater our chance to grow New Zealand's global reputation.

NEW ZEALAND STORY

NEW ZEALAND VALUES

CARE FOR PEOPLE
AND CONNECTION TO PLACE
DRIVES OUR INGENUITY



NEW ZEALAND STORY

SERVICE OFFERING

TOOLKIT

We produce a wide range of royalty-free images and videos, infographics and key messages, all free for use to help tell your story.

CONTENT

We create and curate stories, videos and campaigns that tell New Zealand stories, in a variety of formats.

RESEARCH

We commission and share international research on how New Zealand is perceived in key overseas markets.

CONSULTANCY

We work with government agencies, companies, industry groups, and major events on how to use the New Zealand story.

FERNMARK

The FernMark Licence Programme helps promote and protect New Zealand products and services on a global scale.

NEW ZEALAND STORY

GLOBAL PULSE CHECK 2022

UNDERSTANDING PERCEPTIONS OF NEW ZEALAND IN A WORLD LEARNING TO LIVE WITH COVID-19

Research Conducted August 2022

One Picture. THE DISCOVERY COMPANY

WE COMPLETED 11 ONLINE CONSUMER FOCUS GROUPS AND 10 BUSINESS INTERVIEWS IN 9 MARKETS

Australia	N=1 Focus group (Sydney, Melbourne) N=2 B2B Interview
UK	N=1 Focus group (London) N=1 B2B Interview
USA	N=1 Focus group (SF, LA) N=2 B2B Interview
China	N=1 Focus group (Beijing, Shanghai) N=2 B2B Interview
Germany	N=1 Focus group (Berlin/Munich) N=2 B2B Interview
Japan	N=2 Mini Focus groups (Tokyo) N=1 B2B Interview
Canada	N=1 Focus group N=1 B2B Interview
Singapore	N=1 Focus group N=1 B2B Interview (1x education focused)
Dubai	N=2 Focus groups (male and female) N=1 B2B Interview

The criteria for the consumers we spoke with:
Mix of younger and older ages, all active considerers of NZ for travel, education, F&B or investment

The criteria for businesses we spoke with:
Buyers and influencers of imported goods and services. Range of sectors - F&B, education, tourism, and technology

This is the third year we have now run this programme of work, and the results can be looked at as a 'qualitative barometer' of market perceptions through COVID-19.
Click here to see 2021, and click here to see 2020.

IN 2022, CONSUMERS ARE ACCLIMATISING INTO A 'STRANGE NORMAL' AS THEY LOOKED BACK OUT TO THE WORLD AGAIN

The fear previously felt from COVID-19 has *mostly* been left behind, and the sentiment we heard this time was one of moving on.

Albeit when looking to the future they are still 'cautious'.

CAUTIOUS

ACCEPTANCE

Zero-COVID strategy is unrealistic

FUTURE FOCUSED

Making up for lost time, especially for younger

UNCERTAIN

As new global challenges weigh in

WITH THE FEARS COVID-19 ONCE HELD BEHIND THEM, WE HAVE A GLOBAL CONSUMER WHOSE FOCUS IS NOW WIDENING TO NEW WORLD PRESSURES

New highs that are taking away the disposable income many had gotten used to. What was 'nice to have' is feeling more out of reach.

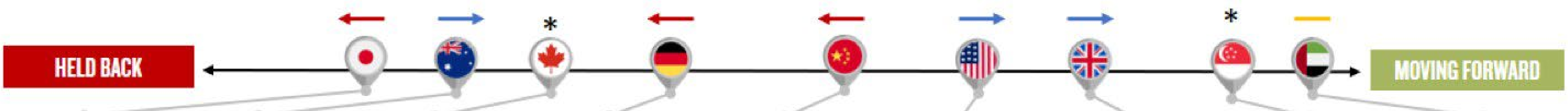
Bringing with it global uncertainty and resource scarcity. More pronounced in Europe, but there was an effect felt by all we spoke with.

Floods, droughts, heatwaves and fires perceived as undeniably linked to climate change. But a gap in being prepared to take action... for now.

SO: THE GLOBAL CONSUMER HAS BECOME MORE SELF FOCUSSED COMPARED TO AT THE BEGINNING OF THE PANDEMIC. WINNING THEIR ATTENTION NEEDS TO ANCHOR BACK TO HOW AND WHY THEY WILL BE 'BETTER OFF'

THE COUNTRIES WHICH PERCEIVED THEMSELVES AS HAVING 'MOMENTUM' WERE THOSE WORKING ON THESE NEW GLOBAL PROBLEMS

Gaining Momentum | No Change | Losing Momentum | * New market



JAPAN	AUSTRALIA	CANADA	GERMANY	CHINA	USA	UK	SINGAPORE	DUBAI
INFLUENCE	INFLUENCE	INFLUENCE	INFLUENCE	INFLUENCE	INFLUENCE	INFLUENCE	INFLUENCE	INFLUENCE
CONNECTION	CONNECTION	CONNECTION	CONNECTION	CONNECTION	CONNECTION	CONNECTION	CONNECTION	CONNECTION
ASPIRATION	ASPIRATION	ASPIRATION	ASPIRATION	ASPIRATION	ASPIRATION	ASPIRATION	ASPIRATION	ASPIRATION

Weary of their place in the world and the effect of other, larger countries making moves around them.

SO: WE NEED TO BE CAUTIOUS OF THE LARGER GEO-POLITICAL FORCES AT PLAY, WHILE ALSO SHOWING WE ARE EAGER TO WORK TOGETHER

Seeking global understanding as they work through lockdowns.

SO: BE READY FOR THEM WHEN BORDERS OPEN

Looking forward to new global challenges and looking for others to support them

SO: SHOW THEM WE'RE READY AND MOVING ON TOO

Focused on those keeping pace with their level of business and economic power

SO: START WITH WHAT'S IN IT FOR THEM


One Picture.
SO HOW HAVE NEW ZEALAND'S GLOBAL PERCEPTIONS SHIFTED IN 2022?

IN 2021, WE HEARD A LOT ABOUT US AS A PEOPLE, AND HOW WE TACKLED COVID-19. IN 2022, THE PENDULUM IS SWINGING BACK TOWARD WHAT WE HAVE, AND A FOCUS ON NATURE

THE DOMINANT NARRATIVE

OUR NATURAL BEAUTY

Our natural environment is now the first thing that comes to mind. Landscapes, nature and beauty are back to being dominant.

We heard more about us as a place than us as a people.

WHAT HAS REMAINED FROM OUR COVID-19 APPROACH

ZERO-CASE MILESTONE

We're still remembered for clearing cases quickly, presenting a united front, and memorable slogans.

But this came to be seen as something that held us back and made us slow to reopen.

CARE-BASED APPROACH

Care is still a strong takeout. In 2020 we were recognised for care-led leadership that showed the world a different way.

But in 2022 there is a concern that we were overly 'cautious' and may have missed opportunities.

DECISIVE INDEPENDENCE

Aware and envious of the decisive leadership we showed in our response to COVID-19, and also gun control laws.

But now question the level of individual freedoms we had to give up as a consequence.

SO: THE POSITIVE PERCEPTIONS WE HAD ACHIEVED FACING COVID-19 HAVE BEEN WEAKENED BY A CHANGE OF FOCUS BACK TO NATURE, AND IN HINDSIGHT, VIEWS ON WHAT THE 'CORRECT WAY' TO TACKLE COVID-19 WAS

SO WHEN WE LOOK AT ALL THE WORDS CONSUMERS ASSOCIATE US WITH, IT REINFORCES THE STEP 'BACK' TO NATURE AND LANDSCAPES... AND NOW EXPENSIVE HAS COME TO THE FORE

NEW ZEALAND IS MORE:

NATURE
LANDSCAPES
PROTECTING
BEAUTY
CONTROLLING
QUIET
FOLLOWING
EXPENSIVE
FAR AWAY

WATCHOUT – we have never heard the word 'expensive' mentioned so many times. While this is largely due to global inflation, it is critical to dial up the value in what we do to overcome this.

WHAT HAS STAYED CONSISTENT?

FRESH AIR
FRIENDLY
PEACEFUL
WOOL
CLEAN
SMALL TOWN
ENVIRONMENT
RESPECTFULNESS
MAGICAL
RUGBY
LIFESTYLE
LOTR
LAID BACK
RURAL
SCENERY
SPACE
DREAMY
HUMANITY
PROBLEM SOLVING
TRUST
WHITE WINE
AGRICULTURE
POSITIVE
UPBEAT
MĀORI
INCLUSIVENESS

REMEMBER – we haven't lost the positive perceptions of the last two years. However, there are new narratives forming over the top that are undoing hard-won work and many of the inherent strengths that reside within our country brand.

SO: KEEP THESE CHANGES IN MIND WHEN YOU DIAL UP WHAT'S INHERENTLY NEW ZEALAND IN YOUR BRAND STORY TO MAXIMISE IMPACT

One Picture.

THEMES FROM B2B INTERVIEWS CONDUCTED ACROSS OUR RESEARCH MARKETS AND SECTORS

THE 2022 GLOBAL BUSINESS ENVIRONMENT IS TIGHTER AND MORE CONSERVATIVE

#1 DELIVER ON TIME AND IN FULL

Many markets have had borders open for longer and are catching back up to pre-COVID-19 supply levels. While shipping remains tight, and containers expensive, we were told there are now fewer excuses to miss shipments.

SO: DOUBLE DOWN ON OUR EFFORTS TO CATCH UP TO THE WORLD. THIS STARTS WITH STAYING IN STOCK

#2 COST OF LIVING IS THE NEW CRISIS

Demonstrating and providing value for their customers is critical. We were consistently told this doesn't always mean cheaper however, and as a small niche player we still hold value, especially as larger luxuries might be sacrificed.

SO: DON'T COMPETE AT THE COMMODITY END, SHOW HOW WE CAN PROVIDE MOMENTS OF ENRICHMENT

#3 BLEND F2F WITH ONLINE

Online has increased the number of meetings buyers can now get through in a day. But they told us F2F still matters, and our competitors have gotten out ahead of us. Being in market still shows dedication to the relationship.

SO: DON'T GET COMPLACENT WITH VIDEO CALLS, WE STILL NEED TO FRONT UP AND SHOW WE'RE SERIOUS

YOUR 2022 STORY NEEDS TO FOCUS ON WINNING BACK LOST GROUND

#4 WE'RE STARTING FROM BEHIND

There was a general sentiment we're not as visible as we were. The physical and mental availability we'd built up in markets pre-COVID-19 has slipped. This affects both our direct relationships and flows onto influencers.

SO: WE WILL NEED TO WORK HARDER THAN EVER TO MAKE AN IMPACT

#5 WORK TOGETHER FOR IMPACT

We are a small country of small businesses that need to help each other on the world stage. Buyers' recommendation was to share more, which they believe we are naturally good at – a booth at a trade show, bundling itineraries, or a container.

SO: A RISING TIDE LIFTS ALL SHIPS, THINK ABOUT HOW WE COULD WORK WITH OTHERS

#6 BE REMOTELY ACCESSIBLE

The time zone to work to is that of your end customer. A view the expectation for this has increased with remote working. This is seen as a way to help bridge the perceived time and distance barrier of working with us.

SO: BEING SEEN AS EASY IS KEY WHEN DISTANCE AND TIME ARE A BARRIER

One Picture.

FOOD AND BEVERAGE

2021: WE WERE LOSING DESIRABILITY IN A WORLD OF RISING COSTS

2022: COSTS ARE STILL RISING, BUT OUR ISOLATION HAS ENHANCED THE PERCEIVED 'NATURALNESS' OF OUR ENVIRONMENT AND WHAT WE MAKE

OUR CHALLENGE: DEVELOPING THE 'SPECIALNESS' THAT THEY CAN BRING INTO THEIR EVERYDAY

	KEY GLOBAL INSIGHTS	KEY TO DOS
What's stayed the same?	**Preference for cooking rather than buying,** means products that elevate meals at home to feel high-end and special, have remained a focus. This has also extended to international cuisines people have come to try in the absence of travel.	We can still represent affordable luxury – that 'something special' that they are able to bring into their home.
	Inflation has put an **additional strain on our already expensive price tag.** Consumers' disposable income is tighter now than it has been the last two years, even with lockdowns. We have gone from not being available to now being available but not accessible.	We need to work harder to sell why we are worth paying more for. This is a value, not a price play and requires us to leverage our country story in unison.
What's new?	Western markets are **increasingly aware of the effect food miles are having on carbon emissions.** This makes us a hard choice next to their local products that they've now gotten use to using and wish to continue to support.	Grow our carbon offset story, and that being carbon efficient can extend past travel distance to also how we grow and produce. Critical to helping consumers feel like we are a good choice.
	Growing tensions between **what they can afford, what's available, and what they desire.** Our F&B increases the tension of all three of these, and even harder with a desire to support local.	We can't afford not to be premium. This story can be elevated by connecting global consumers to the stories that sit behind what we take to the world.

We have additional slides on Primary Industries, Immigration, Education, Tourism, and Tech & Design in the full pack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FULL RESEARCH FROM
NZ STORY TOOLKIT
www.nzstory.govt.nz

FERNMARK LICENCE PROGRAMME

NEW ZEALAND STORY

THE NEW ZEALAND FERNMARK LICENCE PROGRAMME

When you compete in overseas markets, you're literally taking on the world. But you don't need to go it alone. When you carry the trademarked silver fern, our FernMark, you'll benefit from a greater sense of connection to New Zealand's reputation, enhanced credibility with distributors and the increase in trust consumers feel for a product or service that has a tick of approval from the Government.

Eligibility criteria applies.

NEW ZEALAND.COM

Licence No.123456

THANK YOU
NGĀ MIHI

NEW ZEALAND STORY

2022

MAKING NEW ZEALAND FAMOUS
FOR MORE GOOD THINGS