

NEW ZEALAND STORY



NEW ZEALAND
STORY

2022

MAKING NEW ZEALAND FAMOUS
FOR MORE GOOD THINGS



DAVID DOWNS

CEO

...atou enei
Te Taurapa Tūhono
E tū atu nei
E mihi atu nei

Nō reira
Kia kaha rā
Aotearoa
Te Taurapa Tūhono





LESSONS FROM THE TIME OF COVID

DAVID DOWNS

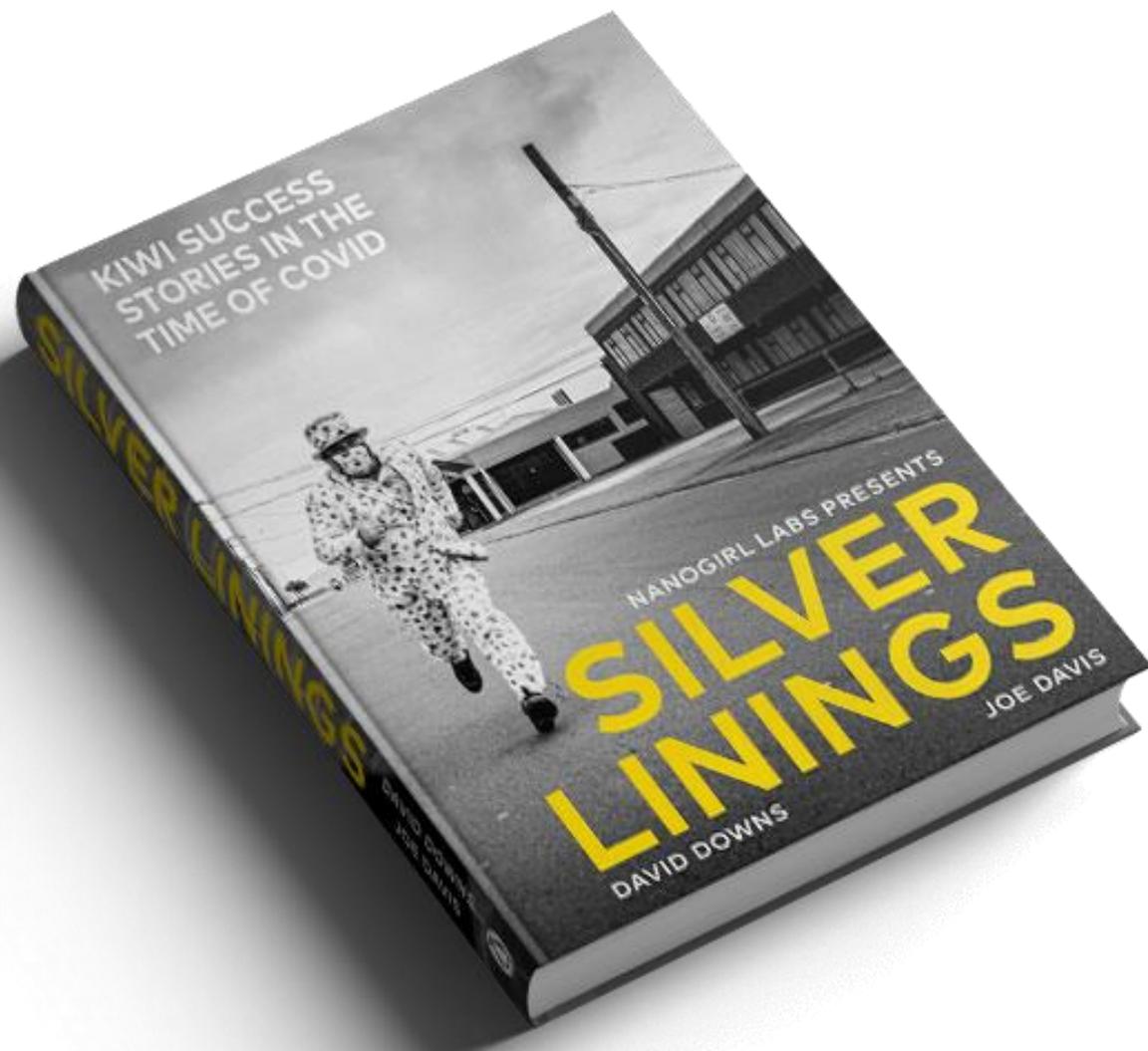
JOE DAVIS

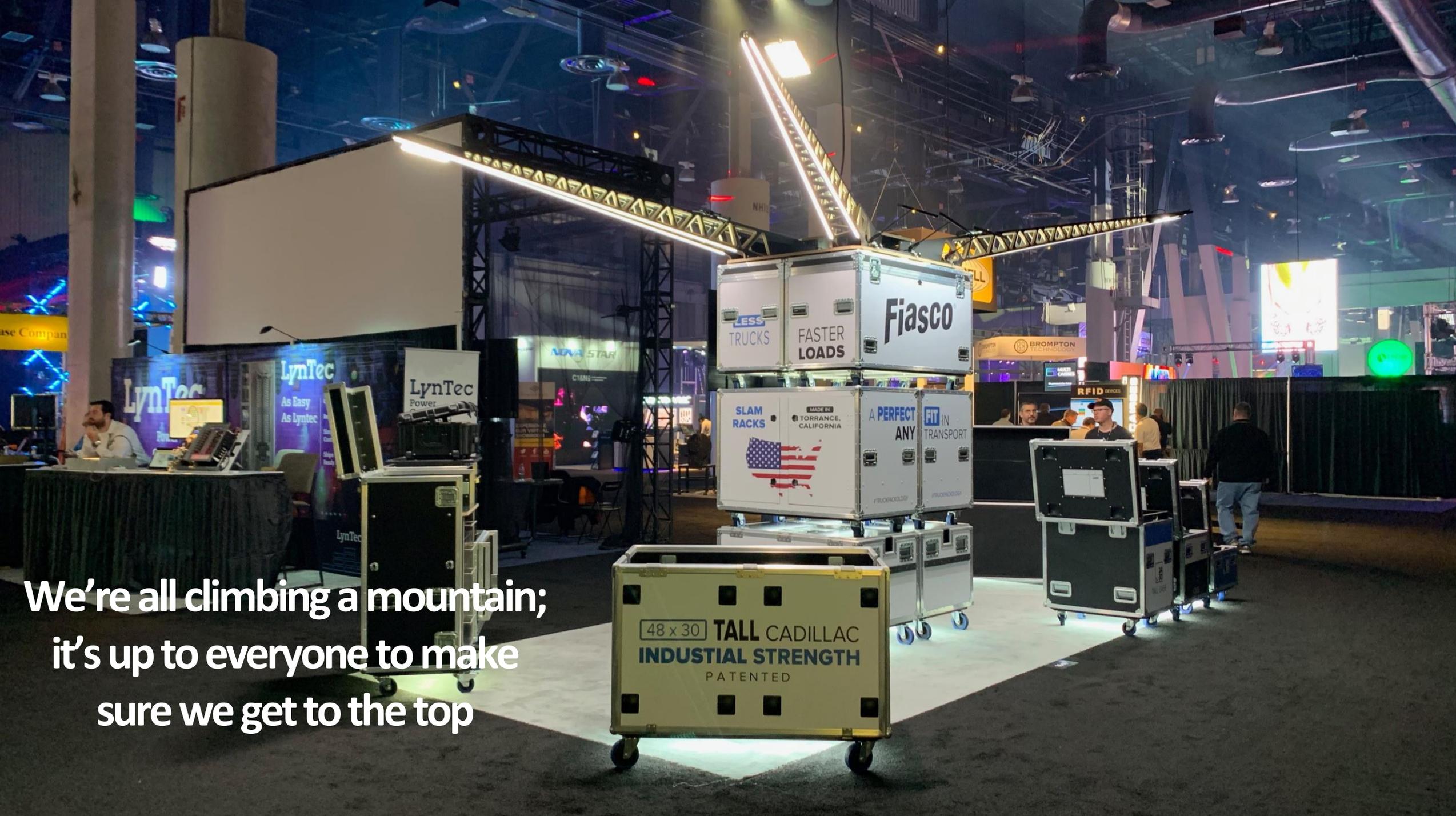
SILVER LININGS

AGILITY

RESILIENCE

HUMANITY





We're all climbing a mountain;
it's up to everyone to make
sure we get to the top

“Suddenly we had a whole new business.”

**Jennifer Boggis
Heilela Vanilla**





TO GREEN
300 YDS

TO LAY UP
200 YDS

DRIVE
310 YDS

“Everyone’s guaranteed a job until
Christmas – Now what do we do?”



**“We went from zero, to \$2m
in revenue, with 17
volunteers who had never
met – in 3 months”**

**David Downs
SOS Business**

Resilient Businesses

A predisposition to taking decisive **Action**

Adaptability in the organisational DNA

Awareness of the organisations strengths and weaknesses

A broader sense of **Community** through building networks

An organisational **Culture** with effective **Leadership**

WHO IS NEW ZEALAND STORY?





Inspire, curate and
amplify storytelling



Bring visitors to
New Zealand



Bring students to
New Zealand



Exports from,
and Investment into
New Zealand



Protect New Zealand's
international relations

Ministry for Primary Industries
Manatū Ahu Matua



Protect New Zealand's
Food Sector



Te Puni Kōkiri
MINISTRY OF MĀORI DEVELOPMENT

Grow New Zealand's
Māori Economy

WHAT IS OUR 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.

ROYALTY FREE IMAGES

VIDEO FOOTAGE

For you to edit into your own presentations, website, videos and other collateral.



INFOGRAPHICS KEY MESSAGES

Infographics demonstrate our unique business culture and are effective when used in presentations and marketing collateral. As a country we are incredibly well positioned across a number of global indices both for our business and social environment.





NEW ZEALAND
STORY

COUNTRY PERCEPTIONS PROGRAMME: F&B DEEP DIVE

Prepared for New Zealand Story
By One Picture
June 2022

One 
Picture.
THE DISCOVERY COMPANY



THE PURPOSE OF THE NZ STORY COUNTRY PERCEPTION WORK COVERS 3 BASES

1



TO UNDERSTAND EXISTING PERCEPTIONS OF NZ FROM A CONSUMER AND BUSINESS PERSPECTIVE

2



EXPLORING REACTIONS AND FEEDBACK TO HOW WE CURRENTLY ARTICULATE OUR NEW ZEALAND STORY

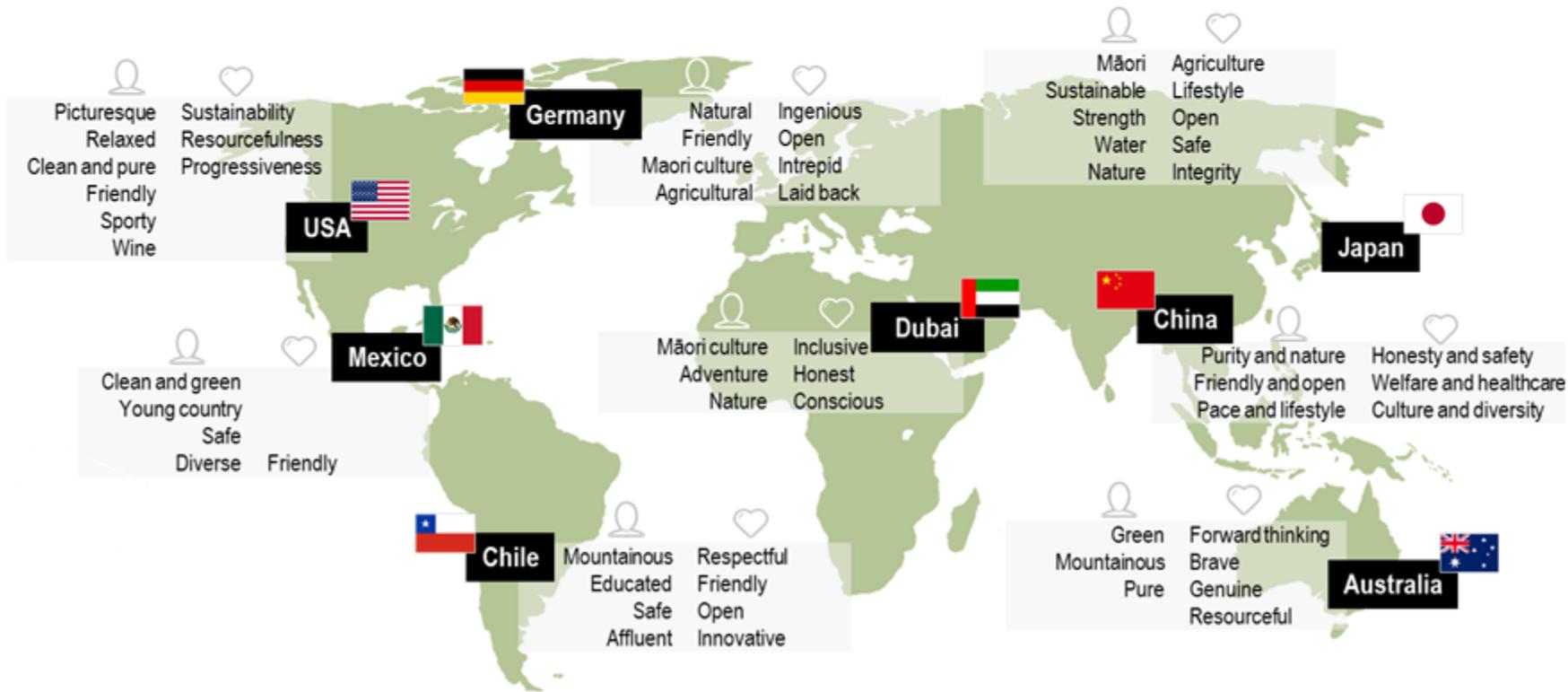
3



HELP BUILD LEADING SECTOR LEARNINGS THAT ENABLE US TO BETTER ARTICULATE WHY TO CONSIDER NZ

... all with the ultimate goal of ensuring that NZ is famous for more than just its natural beauty.

WHEN WE ASK THEM TO DESCRIBE THE 'QUALITIES' THEY SEE AS MOST DEFINING TO NZ AS A COUNTRY, THERE IS A MOSTLY CONSISTENT STORY THAT EMERGES



There is a universal appreciation of our landscapes which then shapes what they can see and do here, **and also what we grow and produce.**

Importantly though, for those countries that know us **there is a respect of who we are as a people,** our integrity and the strength is brings to business dealings.

& for those that work with us we are seen as ingenious. **A small but smart country who can do a lot with a little.**

HOWEVER, WE ALSO HAVE A SET OF SHARED CHALLENGES THAT RISK HOLDING US BACK. THESE AFFECT US AS A COUNTRY, AND CAN HINDER OUR ABILITY TO BE FAMOUS FOR MORE THAN NATURE

LIMITING ATTRIBUTES

 <p>FAR AWAY</p>	 <p>SMALL</p>	 <p>EXPENSIVE</p>
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LIMITING VIRTUES

 <p>TRADITIONAL</p>	 <p>RUGGED</p>	 <p>CASUAL</p>
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SO
:

We need to feel closer & easy to do business with

We need to give confidence that we can scale

That what we have is increasing rare and precious

Show how we supplement F&B with innovation in the processes

Increase focus on unique NZ architecture & design set in the natural environment

We need to turn up suited & booted, and show what's in it for them

IN SUMMARY – WHAT MAKES US SO ATTRACTIVE TO THE WORLD ALSO LIMITS WHAT WE CAN DO AND BE

**BUSINESS CHANGES WE HEARD FROM OUR B2B
CONVERSATIONS DURING THE GLOBAL PULSE CHECK 2021**

THE WORLD HAS CHANGED...



#1. 'MEANINGFUL' IS NOW MORE IMPORTANT

There has been a realisation that the way the world focused on work in the past was not balanced. Employees are now seeking greater meaning from their work, and consumers from what they buy

SO: There is a need to connect why we do what we do to our F&B stories



#2. DIGITISATION OF HUMAN INTERACTIONS

COVID-19 accelerated digital connection, and as such made the world flatter and closer than before. There is greater flexibility now afforded to us than before. Relationships can start on Zoom easier than ever before

SO: Use to enable introductions to networks previously out of reach



#3. SHOPPING IS GETTING MORE PURPOSEFUL

Online continuing to grow and is changing shopping habits. Bricks and mortar has changed too... more bulk buying, a preference for smaller less crowded shops. High value items easier to justify when going out is less common

SO: NZ exports are well positioned to make the most of this retail disruption



#4. TRUST IS MORE IMPORTANT THAN EVER

Restrictions on overseas travel reduced visibility into operations, making businesses rely more on their partners. In this environment, communication and responsiveness are key to building trust

SO: Transparency and ability to resolve issues more important now than ever

HOW WE DO BUSINESS HAS ALSO CHANGED...



#1. CHOOSING TO STICK TO WHO THEY KNOW

Inability to meet face to face has had businesses sticking to whom they know, rather than trying someone new. But for others there will be an appetite to change as any face-to-face meeting feels more impactful

SO: While retaining our relationships may currently be easier, we need to be aware of the growing impact of other markets increasingly able to make an impact in person



#2. IT'S MORE EXPENSIVE, FOR THE SAME

Biggest increases in shipping and logistics. Talk of this going up by nearly 5 X multiples. So too staff costs, retaining and recruiting

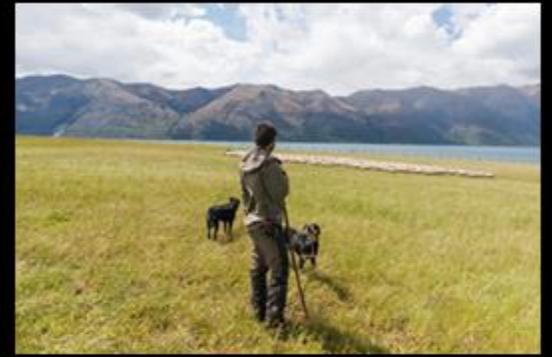
SO: There is a risk that NZ as a far away, already expensive, market may be disproportionately impacted by this



#3. CONTINUITY OF SUPPLY CHAIN IS TOP OF MIND

Taking what you can rather than selecting what you want. Those countries that are 'open' and promising 'back to normal' are winning

SO: Our closed border status was reinforcing the perception that we are far away, and more difficult than closer alternatives



#4. BIG HAVE THRIVED, SMALLER BARELY SURVIVED

A view that those who have had the financial resources to weather the pandemic are those emerging with the strongest tail wind, and as such are most likely to be able to fulfill-in-full & on time

SO: As a comparatively small economy larger markets are assumed to be in a better position to meet demand

AND THEIR PERCEPTIONS OF NZ HAVE CHANGED



#1. THE KIWI WAY STOOD OUT EVEN MORE

The transparent and easy communication reinforced our strong interpersonal skills at a time where many other markets struggled with timely responses and resolutions

SO: Pono, the integrity we have as a business partner, is a competitive advantage



#2. LOGISTICALLY, NZ FEELS FURTHER AWAY

Disruptions to shipments and supply chains are a COVID reality for the world but the further away from home, the more challenging it gets

SO: Buyers are waiting to see how we intend to reopen and how we are planning on tackling supply chain crunches



#3. CLAIMS ARE SCRUTINISED MORE

Those with a closer handle on our policies question our claims, especially when it comes to the environment, and whether we are living up to the clean green image

SO: We can't assume it's given, the more our presence in the global conversation the higher the scrutiny of our actions

**OUR CONVERSATIONS OVER THE YEARS HAVE ALSO GIVEN US
HIGH-LEVEL LEARNINGS ABOUT YOUR CATEGORY, F&B.**

FOOD & BEVERAGE

INSIGHT FROM GLOBAL PULSE CHECK – 2021

2020: What we produce is more desired but now harder to justify

2021: We can't afford to lose desirability in a world of rising costs...

OUR CHALLENGE: Making new connections, and protecting the relationships we have, in a world that is opening back up again

KEY GLOBAL INSIGHTS

KEY TO DOS

What's stayed the same?

Eating habits have changed and buying habits have followed suit. The global consumer is eating out less, so prepared to pay more for high end niche and imported goods that previously would have been hard to justify

Lean into the growing appetite for organic, natural and clean, and New Zealand's inherent association with these qualities

NZ is now even more expensive and harder to justify - Costs are a new challenge for all as businesses manage price increases on logistics and labour

There are a lot of buyers and pent-up demand... It's time to get actively selling again

Whats new?

We are feeling further away, and the food miles that go with NZ as being a far away food producer are harder to justify - Growing preference for local, and food miles are feeling pronounced. This is being driven by consumer preference, but also buyer preference as a way of easing the logistics strain

We need to continue to push the sustainability narrative that NZ produces food with lower emissions to counter this

Zoom has kept business going, but key buyers are ready to connect face to face - Quality checks and relationship building has been difficult in the last year, but for many New Zealand stood out for transparency and ease of communications

Leverage the positive impact we have made on our perceptions during the lockdown and think of how we make a meaningful impact with buyers

WE HAVE BEEN ABLE TO PICK OUT SPECIFIC LEARNINGS AND ACTIONS FOR NEW ZEALAND'S F&B SECTOR IN THE KEY MARKETS

AUSTRALIA – F&B SECTOR

KEY INSIGHTS	KEY TO-DOS
'Closer' to the way nature intended – lighter imprint on the environment	Exaggerate the environmental and ethical practices
Shift to the environment with world-leading facts and statistics	Have the key proof points to validate our environmental story
They would buy more if they could	Put pressure on supply chains – focus on availability
Start with the assumption of great taste and freshness	Use imagery of where produce is grown – counters AUS harsh landscapes

Shift from purity of nature and environment to environment with world-leading facts & statistics

2022

Australia Perception Research

GERMANY – F&B SECTOR

KEY INSIGHTS	KEY TO-DOS
We're seen as a producer of high quality, niche products	Hero the produce that we are known for: honey and wine
Need to prove we're a better choice than their European neighbours	Talk through our, purity and expertise
They're interested in our process and skill in production	Show our natural raw ingredients, and how we've treated them with care
Labelling laws are extremely strict	Transparency of ingredients is key

Go further than quality, right through to transparency of products taste and profile

2019

Germany Perception Research

CHINA – F&B SECTOR

KEY INSIGHTS	KEY TO-DOS
Leverage inherent environmental strength	Hero natural and nourishing
Show what we have beyond raw ingredients	Focus on the whole process – from farm to the plate
Push our Industry's expertise & progressiveness	Focus on our world-class, reliable, and quality process
Bring to life our world-leading restaurants and chefs	Show fine dining, expert chefs and highlight the experience

Inspire them with cuisine that lets them explore their life & environment

2018

China Perception Research

JAPAN – F&B SECTOR

KEY INSIGHTS	KEY TO-DOS
Quality ingredients	Highlight the excellence and safety of how we produce
Their need is freshness	Bring them closer to the farmer – show traceability and faster to-market time
Prove our premium status	Perfect the packaging and presentation to demonstrate care and premium
They have little knowledge of NZ eating habits	Enlighten the experience and enjoyment of our food

Go past the product, to showcase the experience that is 'made for Japan'

2017

Japan Perception Research

USA – F&B SECTOR

KEY INSIGHTS	KEY TO-DOS
Questions around freshness by the time it reached USA	Begin with the West Coast where knowledge & understanding is stronger
There is limited differentiation from what they can get within the US	Share the stories of our people and our geography
Our sustainability story and care for environment is of interest and intrigue	Show how this is informed by a wider country philosophy that is good for the world
Our small size makes them perceive us as expensive and lacking in the innovation space	Traceability, organic, sustainable, unique and untouched help them feel like it's worth it

They have a more 'eco' aware buyer who are open to paying a premium for a strong sustainability story

2015

USA Perception Research

AND WE ALSO HEARD SOME MARKET-SPECIFIC TENSIONS IN 2021, WHICH MAY REFLECT THE SUBSEQUENT DECLINE IN THE APPEAL OF NZ F&B

	AUSTRALIA	GERMANY	CHINA	JAPAN	INDIA	UAE
	There is a shift towards locally produced and a sense of nationality that compels them to support local economy	Continued perceptions of freshness and high quality of NZ F&B, but finding it increasingly hard to justify against the food miles	While no significant tensions, there was a sense they know little about the processes and innovations in our products	Price is a key driver of purchase in the category, so premium and expensive NZ F&B is not often the first to get picked	Products from all western markets are equally aspirational, so NZ F&B at its premium price point may fall behind	Natural and pure are a draw but we don't always meet their labelling standards
NOV 2021	63%	41%	71%	33%	85%	64%
JAN 2022	50%	33%	56%	23%	71%	51%

Appeal scores are from the Kantar Tracker

Jan 2022 Base: Total N=4006 | Australia N=403 | China N=400 | UAE N=401 | Germany N=401 | Japan N=400 | Brazil N=401 | UK N=400 | US N=400 | India N=400 | Singapore N=400
 Nov 2021 Base: Total N=3696 | Australia N=402 | China N=407 | UAE N=400 | Germany N=400 | Japan N=403 | Brazil N=403 | UK N=400 | US N=401 | India N=480

There were no significant shifts in USA, UK and Brazil

OUR FOOD AND BEVERAGE STORY NEEDS TO MOVE BEYOND OUR NATURAL ADVANTAGE, TO ENCOMPASS THE CARE AND CAPABILITY WE TREAT OUR RAW NATURAL INGREDIENTS WITH



Our Place

And a promise of it being clean and pure



Our People

And the integrity and honesty that they add to our story



Our Thinking

Open, collaborative and good for the world

A MOVE AWAY FROM BEING A SMALL AND FAR AWAY PLACE TOWARDS A COUNTRY WITH THE SMARTS AND CONFIDENCE IN ITS GIFT THE WORLD

We can tell this story with four Māori values we know resonate with New Zealand and the world..

TIAKI

+

PONO

+

MANAAKI

+

PŌTIKI

AND WHAT WE LEARNT ABOUT HOW TO TELL YOUR NZ STORY



DON'T BE AFRAID TO BE BOLD

We often go more 'traditional' in the way that we show images. **When we're not using nature as a direct backdrop, we need to be loud, bold, bright and energetic.... things they often associate with great cities** (a key weakness we have!). This energy plays well with our 'braveness' and 'originality' and is a natural fit if we choose to embrace it...



Progressive and vibrant



DON'T MISS THE INGENUITY

Our thinking is often 'sandwiched' into the greater context of its use, rather than being highlighted for its own merit. **We should be owning more of the specific innovations** and then leveraging their global application and usage to provide credibility and support...



Emerging ideas and collaboration



SHOW THE VALUE ADDED PRODUCT

No one doubts NZ's credentials as a producer of primary goods (think timber, dairy & wool). But **consumers are more interested in what we DO with the primary products we have** –the combination of the environment they were grown, the care in their making and where and how and by whom they are enjoyed



Expertise and craftsmanship



TELL A STORY THAT'S IN UNISON WITH NATURE

Images that show machinery or equipment that isn't in context of the space around it look **HARSH, ENVIRONMENTALLY UNFRIENDLY, and OUT OF SYNC** with their surroundings... in order to **show industry in a NZ way** – it needs to be demonstrated to be 'in unison' with the things around it



Sustainability and Innovation

AND THE ROLE OF MĀORI CULTURE ...

THE WORLD IS READY

THE AWARENESS AND INTEREST IN MĀORI CULTURE HAS STRENGTHENED GLOBALLY



Awareness of Māori culture, but little interest in knowing more

2015
Australia
Perception
Research



Curiosity around culture and language, but viewed through a tribal lens

2016
USA Perception
Research



Interest and awareness driven primarily through Rugby and Haka

2017
Japan Perception
Research



Respect and admiration for Māori culture, but awareness limited to Haka

2018
China Perception
Research



Awareness of Māori - Pakeha relationship and the role of Māori culture in NZ

2020
Global Perception
Research
USA, Australia,
China



Growing awareness of Māori culture and increasing interest in Te Reo

2021
Global Perception
Research
USA, Australia,
China, Japan

SO..



1

Māori culture is a critical pillar of New Zealand culture that makes us both different and interesting to the world. It is integral to our story of care for people and place



2

It demonstrates that we are a people who act with integrity, that we are two cultures that live by side by side. The reciprocity of the Pakeha-Māori relationship is aspirational in many parts of the world



3

Use of Te Reo is an indicator of our cultural strength. Domestically NZers have never been more supportive of it. And internationally there is growing interest and acceptance for both Māori and English explanations to live side by side

LASTLY, REMEMBER...

- 1 There is a changing global consumer we need to be ready to meet before they slip back into their 'old normal'

SOLIDIFY OUR PLACE WHILE THE WORLD IS STILL PAYING ATTENTION

- 4 Zoom has levelled the playing field and despite our distance has connected us and brought us closer to the rest of the world, giving us the opportunity to overcome our traditional shadow

SHIFT FROM 'CORNER OF THE WORLD' TO 'CENTRE OF DIGITISATION'

- 2 Each country has responded to the pandemic in it's own way, which affects the confidence it citizens feel

TUNE YOUR MESSAGE BY EACH MARKET

- 5 The world is getting more expensive and logistically harder. As what was already viewed as a small and niche provider, we have to work harder to justify our price premium

WE NEED TO FIND THE VALUE IN OUR STORY

- 3 Perceptions of NZ have widened and deepened beyond our sense of place to know us as a people and the respect we have for each other

LEVERAGE OUR PEOPLE-STORY TO STRENGTHEN THE CONNECTION

**NEW GLOBAL
PERCEPTION RESEARCH
COMING UP IN OCTOBER**



MADE WITH CARE

MADE WITH CARE is a global campaign designed to grow awareness, preference and demand for New Zealand food and beverage products. Managed by New Zealand Trade & Enterprise (NZTE), driven by consumer insights and backed by significant investment, the campaign aims to build a foundation of value for New Zealand products that individual businesses can leverage through campaign initiatives and their own sales and marketing efforts.

To help amplify this campaign a 'ready to use toolkit' has been created for New Zealand exporters to use. All the images, copy, graphics and design files are available at the NZ Story Toolkit for you to download and use.



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.



THE
NEW ZEALAND
FERNMARK
LICENCE
PROGRAMME



NEWZEALAND.COM

Licence No.123456

CURRENT SNAPSHOT

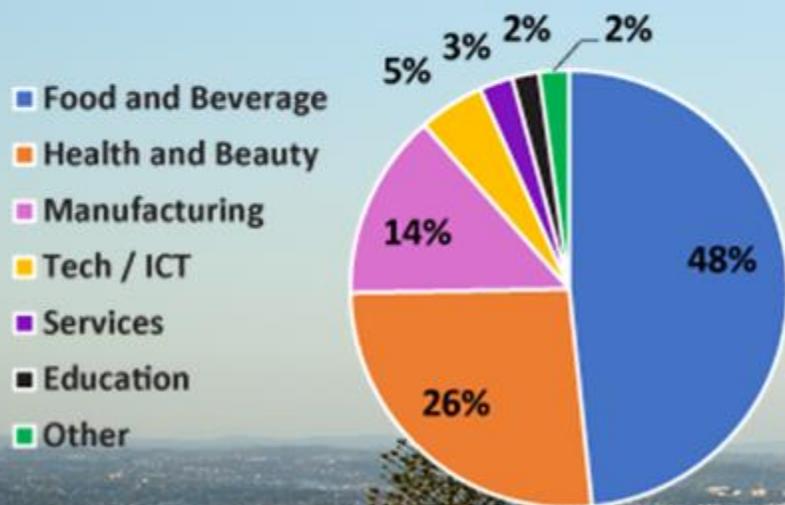


THE
NEW ZEALAND
FERNMARK
LICENCE
PROGRAMME

DOMESTIC ENGAGEMENT

460+ FernMark Licensees are members of our FernMark community, under the Programme.

Wide range of industry sectors, from large companies to startups.



INTERNATIONAL ENGAGEMENT

Over **77** countries.

Over **600** million units.

Trademark registered in **30+** jurisdictions.

Used by Government, Major Events and Ambassadors (EXPO, APEC, Air NZ, Rocket Lab, Emirates Team NZ).



INTERNATIONAL RESEARCH



THE
NEW ZEALAND
FERNMARK
LICENCE
PROGRAMME

A corporate partner conducted research in five key markets (China, Malaysia, Saudi Arabia, New Zealand and the USA) testing awareness of the FernMark against other country of origin marks.

FernMark was the preferred mark in most markets.

Preferred Made in NZ variation

	 n=665	 n=143	 n=131	 n=130	 n=122	 n=139
TOP 1	Variation 4 (41%) 	Variation 4 (48%) 	Variation 4 (48%) 	Variation 4 (40%) 	Variation 4 (41%) 	Variation 1 (43%) 
TOP 2	Variation 1 (34%) 	Variation 1 (33%) 	Variation 2 (34%) 	Variation 2 (37%) 	Variation 3 (39%) 	Variation 3 (30%) 
TOP 3	Variation 2 (31%) 	Variation 2 (31%) 	Variation 1 (27%) 	Variation 1 (31%) 	Variation 1 (32%) 	Variation 2 (29%) 

Top 3 most preferred/
1st ranked
image variation





THANK YOU NGĀ MIHI



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