



PERCEPTIONS RESEARCH: HOW DOES CHINA SEE NEW ZEALAND

Prepared for NZ Story
by Big Picture 2018

Big picture 



WE LAST CONDUCTED RESEARCH FOUR YEARS AGO. THIS TIME OUR RESEARCH UNCOVERED A VERY DIFFERENT CHINA...



LAST TIME - HOW CHINESE
TALKED ABOUT THEMSELVES

“

“We don't want other people
to look at us and think that
we are backwards or behind...
We're not that far behind
countries like the USA...” 2015

”

IN SHORT: CHINA HAS CHANGED...



THIS TIME - HOW CHINESE
TALKED ABOUT THEMSELVES

“

“Change in China is constant...
we're continuously evolving, faster
than anyone can keep up with...
Everyone's now looking at China &
what we're doing” 2018

”



CHINA NOW SEE THEMSELVES AS LEADERS, NOT FOLLOWERS



Past:
sought connections & commonalities to the west

Present:
a focus on what's best for China, which isn't necessarily what the west are doing



Past:
focus on being more interesting to the west

Present:
creating their own road map and leaving other countries behind



Past:
a factory to the world & known for mass production

Present:
front runners in innovation with tech giants leading the way

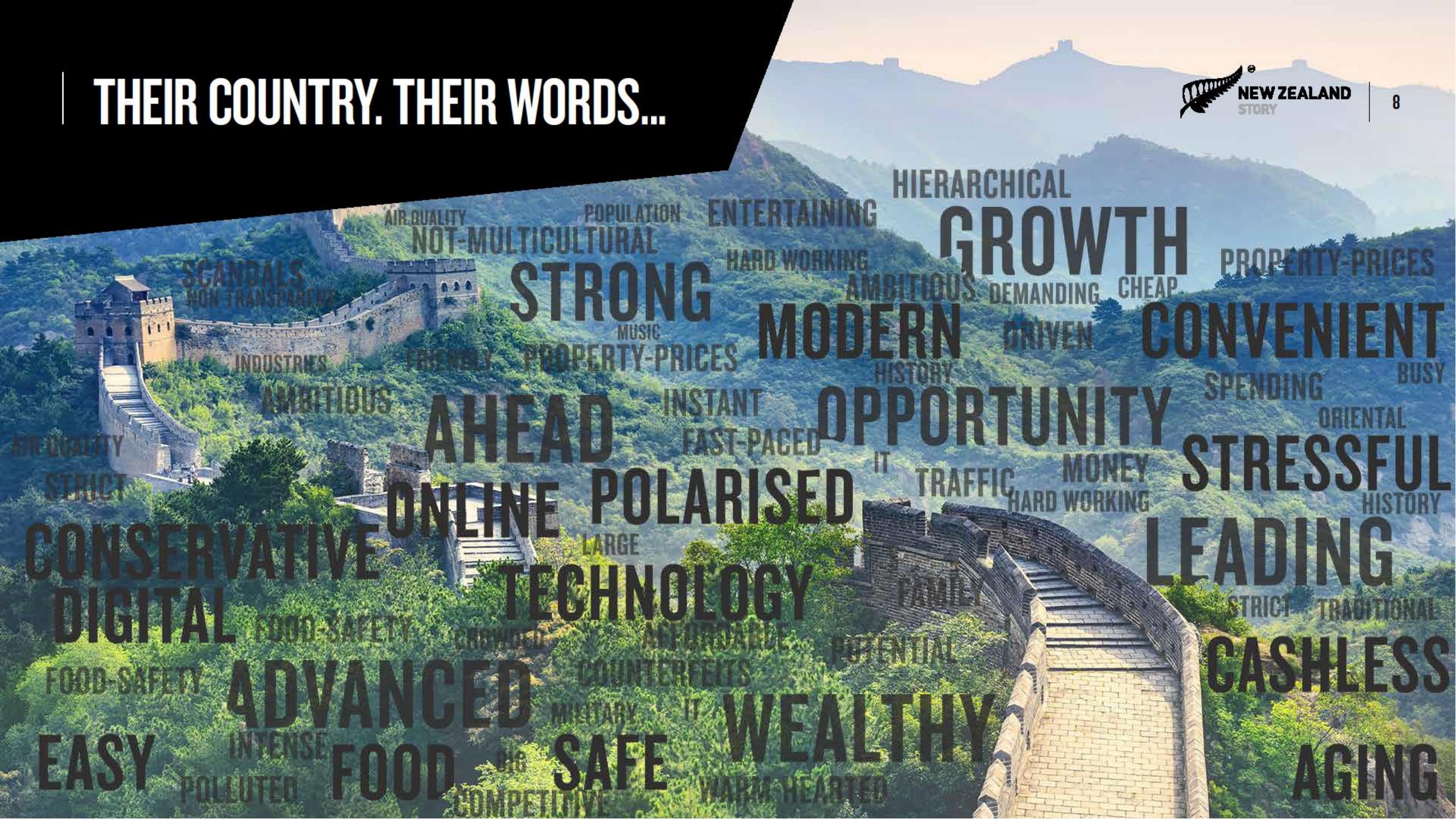


Past:
a greater awareness of others

Present:
looking inward

SO:
**#2. CHINA WANT TO KNOW WHETHER YOU
ARE READY FOR THEIR WORLD. THEY ARE
LESS CONCERNED WITH HOW YOU PERFORM
AGAINST THE REST OF THE WORLD.**

THEIR COUNTRY. THEIR WORDS...





CHINA'S MOST DEFINING CHARACTERISTICS THAT SET THEM APART

PERCEIVED TO STILL BE
STRENGTHS OF THEIR

Cuisine

History & culture

Family

IN SHORT:
Even in the new China there's
still a lot of tradition and
conservatism

NEW FOUND STRENGTHS
THEY SEE IN THEMSELVES

Economy

Innovation

Hard Power

IN SHORT:
A shift from developing to
developed that's asserted
their place and status in the
world



THE SHADOW TO THE PROSPERITY THAT CHINA OFFERS



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A PROBLEM STILL BUT
GETTING BETTER

WEAKNESSES THAT REMAIN

ISSUES GETTING WORSE

Pollution

Stressful

Crowded

Competitive

Controlling

Disparity

Aging

IN SHORT:

There's a growing tension between a more affluent and improved Chinese lifestyle and the undertow of tightening controls that are being more noticeably enforced



WE PROVIDE RESPITE TO THEIR WORLD

CHINA DESCRIBE
THEMSELVES AS

Suspicious

Self-centred

Conservative

Chaotic

CHINESE ARE THEREFORE
DRAWN TO

Honesty

Friendliness

Openness

Purity



SO:

**#3. VALUES SUCH AS OPEN AND INCLUSIVE
REPRESENT AN ATTRACTIVE CONTRAST TO
CHINA TODAY. SOME OF OUR STRENGTHS PLAY
DIRECTLY TO THEIR AREAS OF PERCEIVED
WEAKNESS AND STRUGGLE.**



PERCEPTIONS DIFFER BETWEEN YOUNGER AND OLDER CHINESE

YOUNGER – MAKE ME FITTER & SMARTER

Strong sense of ambition
and drive

More willing to spend than
previous generations

The Chinese dream has only
got stronger

People travel overseas and get jobs
pretty easily. But here in China I'll
find myself a proper job

OLDER – NEED SECURITY FOR THEIR FUTURE

Looking outward for some
respite

Wanting something
different for their kids

Worry about financial
security

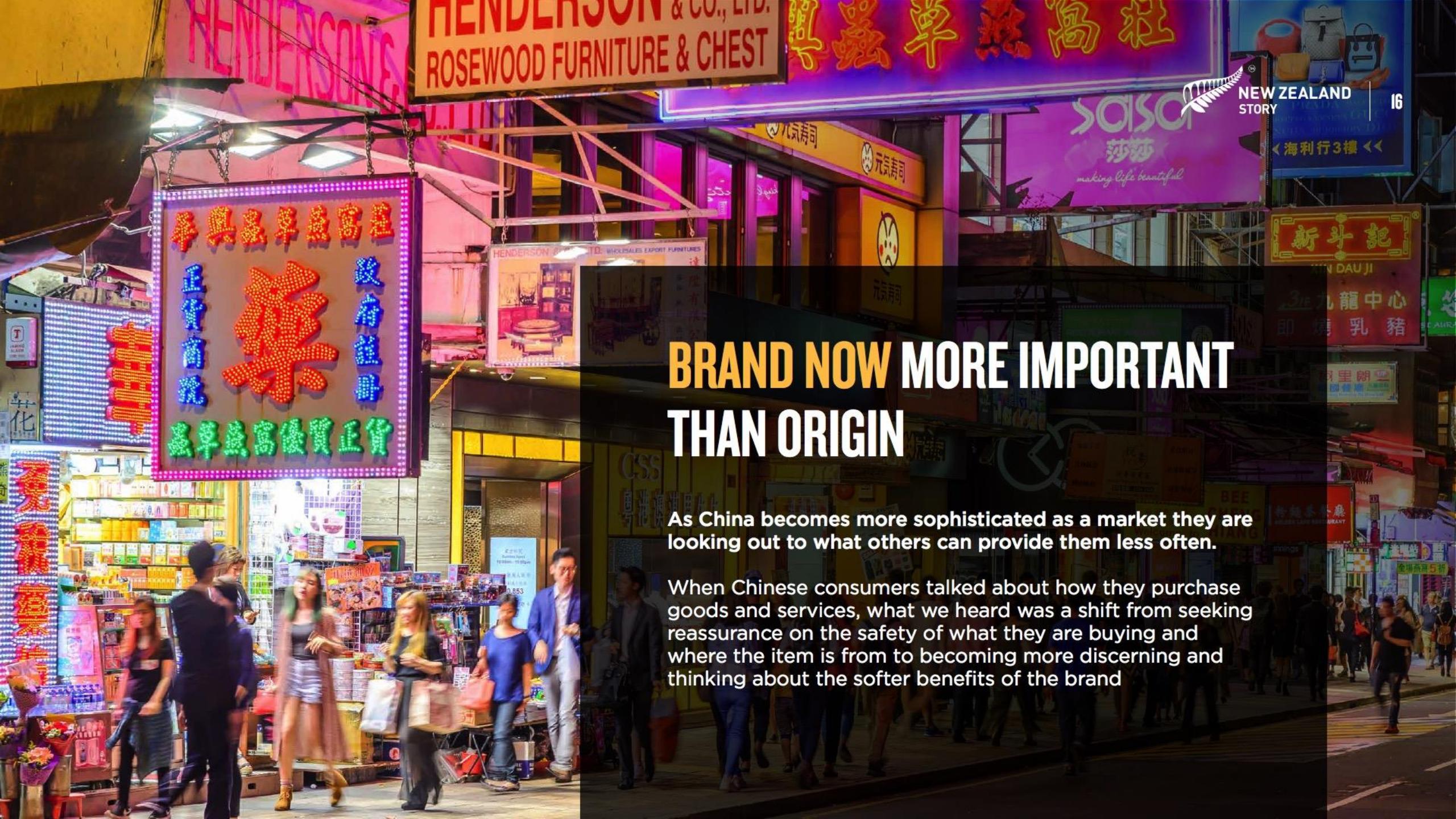
The pace of life and how hard you
have to work is difficult. And the care,
especially for the elderly, isn't good





SO:

#4. TALK DIRECTLY TO THE ASPIRATIONS OF THE EMERGING CHINESE POPULATION. THEY REPRESENT THE 'NEW CHINA' AND FOR NZ, AS WE WILL SEE, THIS REQUIRES EXPANDING WHAT WE STAND FOR IN THEIR EYES.



BRAND NOW MORE IMPORTANT THAN ORIGIN

As China becomes more sophisticated as a market they are looking out to what others can provide them less often.

When Chinese consumers talked about how they purchase goods and services, what we heard was a shift from seeking reassurance on the safety of what they are buying and where the item is from to becoming more discerning and thinking about the softer benefits of the brand



SO:
**#6. SHIFT THE CONVERSATION
WITH CHINA FROM FUNCTIONAL
COUNTRY OF ORIGIN. INSTEAD
LOOK TO THE UNIQUE EMOTIONAL
& EXPERIENTIAL ATTRIBUTES OF
YOUR COUNTRY OR BRAND**

DIGITAL DEFINES THEIR LIFE. MORE SO NOW THAN IN THE PAST.



Chinese **ATTITUDES** towards tech are different to the west

Chinese **USE** tech more than the west

Chinese tech's **INFLUENCE** is stronger than it is in the west

And their **PLATFORMS** are more fragmented than the west

There is a perception among businesses that we aren't yet tailoring our products and offerings in a more targeted and focussed way to the Chinese consumer.



SO:
**#7. EMBRACE THEIR DIGITAL WORLD, OR GET LEFT BEHIND.
IT'S NOT ENOUGH TO TRANSFER
WHAT WE KNOW ABOUT
WESTERN PLATFORMS
TO CHINESE PLATFORMS**

CHINA STILL DEFINES US BY OUR SIMILARITIES TO AUSTRALIA



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“When I think of New Zealand I think of Australia. They’re both beautiful countries with almost identical flags”



We’re mostly talked about by what we share in common with AU:
close to each other, far away, safe, natural and clean, friendly & welcoming people

IN PAST RESEARCH – we’ve been seen as second best to Australia, who are perceived to offer everything that we do and more....

BUT WE ARE STARTING TO BE HELD IN A MORE FAVOURABLE LIGHT



"AU agricultural products are half a level lower than NZ. The land isn't as fertile & they have fruit flies, which means they need pesticides"
(B2B - produce buyer)

NOW - We have inched ourselves ahead of Australia which means that across sectors we are increasingly seen as being able to offer just as much, if not more than them



NZ does better DAIRY,
AUSTRALIA does
better BEEF



NZ are a HAPPIER
country than AU



Easier & cheaper
to STUDY in NZ
than AU



NZ has a better
ECONOMY right
now than AU



More AFFORDABLE
to live in NZ



THE QUALITIES THEY THINK DEFINE US MOST

IN MANY WAYS NEW ZEALAND REPRESENTS THE OPPOSITE TO THEIR EVERYDAY. FOR MANY THIS IS SOMETHING THEY ARE DRAWN TO.



PURITY & NATURE



FRIENDLINESS & OPENNESS



PACE & LIFESTYLE



HONESTY & SAFETY



WELFARE & HEALTHCARE



CULTURE & DIVERSITY

THE SHADOW THAT PUSHES US AWAY

IN THEIR EYES WE ARE A COUNTRY THAT'S FALLING BEHIND, RATHER THAN KEEPING UP WITH THEM AND THEIR WORLD.



SMALL & REMOTE



SLOW & QUIET



“LAZY” & SHELTERED

RESHAPING WHAT IT MEANS TO DO BUSINESS

WITH NZ **WHAT ALL OF THESE HAVE IN COMMON IS THE ENVIRONMENT, WHETHER THIS BE NATURE AS THE BACKDROP OR MULTICULTURALISM IN THE WORKPLACE**



A COUNTRY THAT HAS
JOB OPPORTUNITIES



WORLD CLASS
EDUCATION



AN ENVIRONMENT THAT
PRODUCES GREAT FOOD



SEEING ASPIRATIONAL &
FUTURISTIC IMAGERY



THEMSELVES IN THE SHOT -
SUCCEEDING



WHAT LIFE IN NZ MIGHT
OFFER THAT CHINA CAN'T

THERE'S A GENERAL PERCEPTION THAT IT'S HARD TO DO BUSINESS WITH NZ. BECAUSE WE ARE...



01. REMOTE AND DISCONNECTED

SO WHAT?
This can put us a step behind Australia

02. SLOW AND LAZY

SO WHAT?
Be responsive

03. EXPENSIVE

SO WHAT?
Winning business starts with winning consumers

04. COMPARATIVELY LIGHT ON INFRASTRUCTURE

SO WHAT?
Size and scale is how they think about investment

05. TRYING TO TAKE NZ PACKAGING INTO THE CHINA MARKET

SO WHAT?
Tailor packaging and deliver to a higher standard

SO:
**#9. SHOWCASE THE ADDED
VALUE AND WHAT'S UNIQUE IN
YOUR OFFERING. NZ ALONE ISN'T
ENOUGH AS DOMESTICALLY
PRODUCED IS INCREASINGLY
A WORTHY COMPETITOR**



BUT CHINA IS CHANGING FAST, AND THIS POSITION MAY NOT BE VALID FOREVER

CHINA'S GROWTH

As China's growth continues, there is an increasing amount of **CONFIDENCE, PRIDE and COMPETITIVENESS**

NZ'S RELEVANCE

And in turn the relevance and role that we have in their world is **STARTING TO NARROW**

Which means we need to ensure that our positioning and marketing is working harder for us and doing a job on more than just one sector





PERCEPTIONS RESEARCH:



[PERCEPTIONS RESEARCH: HOW DOES CHINA SEE NEW ZEALAND](https://www.nzstory.com/china-research)

[CREATIVE IMAGERY TIPS](https://www.nzstory.com/china-creative-imagery-tips)

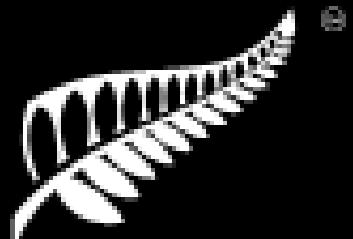
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BUILDING TRUST IS GOLD



“ The use of the FernMark is a great way of enhancing transparency and trust in our products ”

Stephen Jacobi
Executive Director
NZ China Council



NGĀ MIHI



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www.nzstory.govt.nz

Big picture 

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