

MARKET PULSE 2025

Insight Report
May 2025

AUCKLAND ART GALLERY TOI O TĀMOKI

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PROJECT BACKGROUND



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UNDERSTANDING SOFT POWER

New Zealand Story's latest Market Pulse research provides a fresh perspective on how Aotearoa New Zealand is perceived across seven key trading markets: Australia, China, India, Japan, Singapore, the United Kingdom, and the United States.

The findings show that New Zealand continues to be recognised for its strong moral values and global reputation as a safe, principled and progressive nation. New Zealand is seen as having a sustainable future, a strong and stable economy, and being easy to do business with. These broad perceptions offer a positive foundation from which to grow influence and commercial value.

The 2025 research focuses on how three nation brand attributes — rich heritage, arts & entertainment, and products & brands — shape New Zealand's reputation and influence internationally.

These attributes are not chosen at random; they are recognised globally as key pillars of a country's "Soft Power," which is measured by the Global Soft Power Index (GPSI). The GPSI is an annual ranking produced by Brand Finance that assesses how nations are perceived across 35 attributes grouped into eight pillars, including Culture & Heritage, Business & Trade, Governance, and People & Values. It reflects a country's ability to attract investment, trade, tourism, education, and talent through reputation and brand perception, rather than through "Hard Power" or coercion.

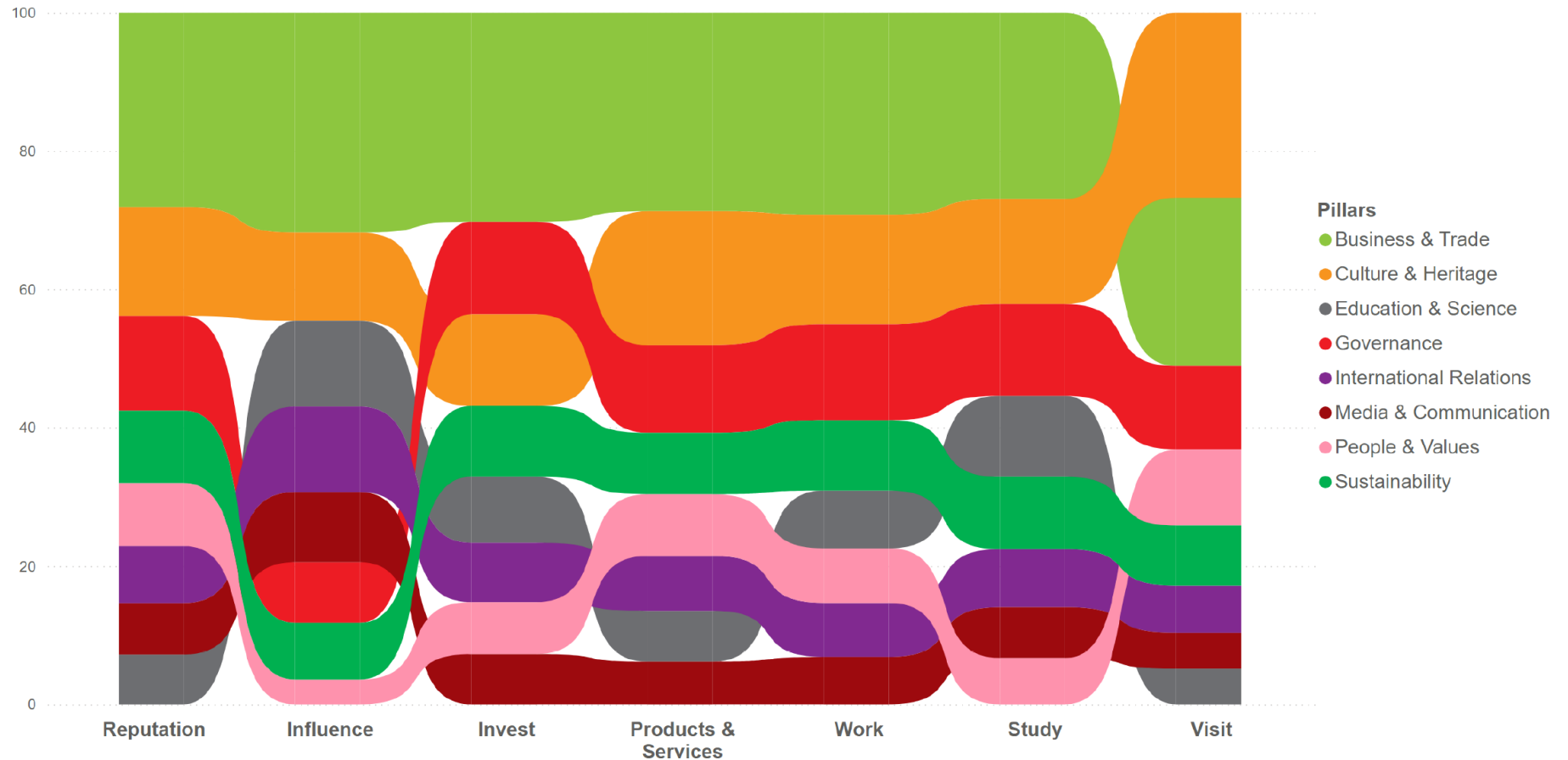
The insights from this year's research build on previous research into science, technology and innovation, space, and sustainability, and help us understand how to enhance New Zealand's international reputation to support economic growth.

2024 KEY MARKETS: BUSINESS & TRADE AND CULTURE & HERITAGE ARE KEY DRIVERS OF SECTOR PERCEPTIONS

The GSPI analysis revealed specific pillar importance for KPIs and sectors across key markets.

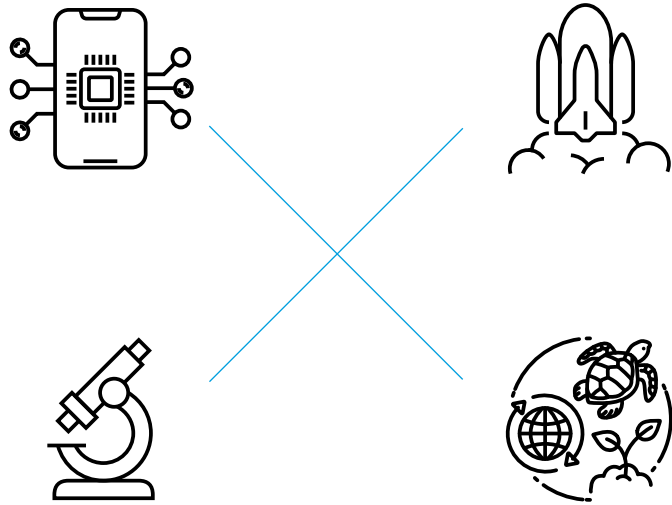
Business & Trade is the most important driver across all sectors with the exception of visitation.

Culture & Heritage is also critical, especially in visitation, and Governance is a key driver for investment.



UNDERSTANDING NEW ZEALAND'S SOFT POWER DRIVERS

IN 2023, WE EXPLORED SOFT POWER DRIVERS OF **SCIENCE,
TECHNOLOGY & INNOVATION, SUSTAINABILITY AND SPACE.**



IN 2025, WE'VE EXPLORED SOFT POWER DRIVERS OF **RICH
HERITAGE, ARTS & ENTERTAINMENT, AND PRODUCTS & BRANDS**



Rich Heritage

*The cultural
story of our
history.*



Influence in Arts & Entertainment

*The people and
stories we tell and
export.*



Products & brands the world loves

*What we make
and sell.*

MARKET PULSE

KEY OBJECTIVES

1 Provide an understanding of how consumers in markets of interest feel about their own nation and how this has changed since the 2023 research was conducted.
A high-level view in line with previous Market Pulse research studies.

2 Provide in-depth understanding of **how New Zealand is perceived** on three nation brand attributes.
The work seeks to **understand the 'why' behind the Brand Finance GSPI data** so that government agencies and exporters can better understand the drivers from a consumer point of view, thereby enabling decisions that can help shift perceptions. This in turn has the potential to improve economic outcomes through being more influential on the global stage.

The three key GSPI attributes of focus are:

- Has rich heritage
- Is influential in arts and entertainment
- Has brands and products the world loves

The stronger a nation's Soft Power, the greater its ability to attract investment, market its products and services, promote tourism, and attract talent.

KEY INSIGHTS FROM MARKET PULSE 2025

What we heard

Countries with visible culture, celebrated creative exports and trusted brands punch above their weight commercially. New Zealand is known for safety, sustainability and friendliness but has limited influence beyond that halo.

Mind-share is dominated by New Zealand's primary products. Sauvignon Blanc, honey, lamb, dairy, kiwifruit, and wool are spontaneously linked to New Zealand, unlike specific brands.

Awareness of New Zealand film, music, design and gaming is low. Lord of the Rings scenery still resonates (but is fading), however younger audiences don't automatically connect it to New Zealand creators.

Māori culture is a clear point of difference for New Zealand, but knowledge in key markets is often surface-level.

Each market's economic mood and national confidence shape its consumer sentiment, and which stories resonate.

What it means and why it matters

Stronger soft power makes it easier to win shelf-space, investment, tourists and talent – and to charge a premium.

Frame New Zealand as a premium solutions partner, not just a source of raw ingredients. Origin stories must be made explicit if we want value over volume. Without recognisable consumer brands, we can struggle to be seen beyond commodity products and pricing.

Arts and entertainment need investment and scale to become more visible. These sectors can help turn scenic admiration into cultural fandom, boosting soft-power, media attention and appetite for goods from New Zealand.

Bring Māori culture to life authentically. Deepening and authentically sharing our cultural heritage can help New Zealand own a distinctive global positioning that other nations can't mimic.

Exporters who tailor their pitch to a specific market can **cut through faster and make meaningful connections with consumers.**

By closing perception gaps, New Zealand can progress from a trusted commodity supplier **to a premium, culture-rich partner with strong heritage.** This can help to unlock stronger price premiums, customer loyalty and a more resilient national brand.

MARKET MOOD - OWN NATION SENTIMENT

A snapshot of how people in our seven priority markets see *themselves* in 2025 - Australia, China, India, Japan, Singapore, UK, and USA.

Why it matters

- A market's self-image drives its openness to foreign brands.
- Understanding the local mood can help New Zealand exporters tailor their story for relevance.

THE MACRO CONTEXTUAL ENVIRONMENT OF THE RESEARCH: WHAT'S HAPPENED SINCE 2023?

ELECTIONS

Key elections in the USA, UK and India saw consequential new administrations, or coalitions. A rise of violent populism, particularly in the USA - the result of factioning and widening political ideologies.

WAR

Expansion of war in the Ukraine, escalation of the conflict in Gaza, the Sudanese civil war and India-Pakistan skirmishes. Many nations questioning how involved to become.

RISE OF AI

A sudden acceleration of capabilities and access to AI is creating a new technological and economic arms race for advantage and control of the new technology.

ECONOMIC TURMOIL

Modest growth, inflation and recessions, cost of living crisis, exacerbated by American policy and tariffs, means citizens feel increased and continual pressure, as well as a lack of certainty.

CLIMATE CRISES

Continued impacts of the climate crisis - hurricanes, floods, LA wildfires and the hottest year on record in 2025. These continue to compound stress on people and economies, with minimal meaningful action to resolve.

AMERICAN DISRUPTION RESHAPING DOMESTIC STABILITY AND GLOBAL ALLIANCES

The big takeouts we see in 2025; Western markets:



A period of uncertainty and reassessment within the US, as recent political changes contribute to evolving diplomatic engagement and alliances.



A greater focus on domestic issues and questions over the future of the country. A great need to solve economic pressures and create a united vision for the country's role and identity.



Little change in their global role but some **sense of relief at geographic and political distance** from the most significant conflicts of the day.

ACTIONS OF THE USA ARE RESHAPING OPPORTUNITIES IN THE LARGEST ASIAN MARKETS

The big takeouts we see in 2025; Eastern markets:



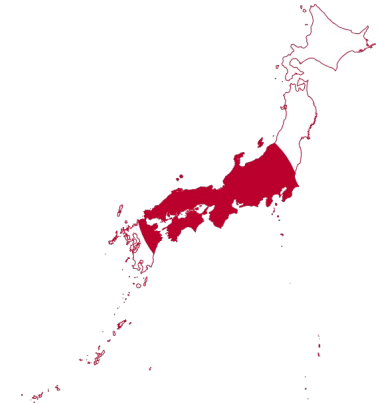
A steely resolve to withstand the global pressures from the USA / West. A feeling the country has **been long preparing for current political and economic challenges that are unfolding.**



Whilst some economic uncertainty exists, there is **optimism in the opportunity** that is emerging from rising USA-China conflict, and the role India might be able to step into as China is further isolated by the USA.



Comfort in political and economic stability, strong trade ties and distinct role as the East-West hub.



Concern over the degree of insularity and disconnect from the global culture and order, and a growing sense that Japan needs to strengthen political and cultural connections.

MARKET MOOD: THE USA IN 2025

HOW AMERICANS SEE THEMSELVES IN 2025

INNOVATIVE

Sense that America is the place that **drives the world's innovation**, creating and growing new sectors and **remains the benchmark** in industry, tech, opportunity and freedom.

REGRESSING

Whilst influence remains, some perceive America's traditional leadership role as less certain, and its **global status more fragile**. There is a sense the country is relying more on hard power, with recent changes seen as reversing progress at home and abroad.

UNCERTAIN

Some believe the idea of America will prevail, and current challenges are short term, but there is **much uncertainty as to what the future holds** and whether current problems will leave with this administration or are the new norm.

INEQUITABLE

American way of life increasingly being questioned, with **the ever-widening gap between rich and poor** increasingly apparent. **Low and worsening standards in welfare, health and education** being recognised as not the global norm.



HOW PERCEPTIONS HAVE EVOLVED SINCE 2023

INFLUENCE

Declining vs 2023

America's influence remains significant, though some now view its impact less positively than in the past. Despite strong cultural influence, the USA's role in geopolitics is seen by some as having diminished.

Recent approaches towards allies and rivals are perceived as more forceful, which some feel has affected the country's traditional strengths on the world stage.

CONNECTION

Declining vs 2023

As a result of a stronger focus on domestic priorities, some perceive that connections with traditional allies and trading partners are weakening.

There is a sense that the country is becoming more inward-looking, and that challenges at the border for both tourists and migrants are evidence of reduced global connection.

ASPIRATION

Declining vs 2023

Many still believe America has much to offer the world, and see the country's diversity and multicultural society as key strengths.

However, some participants expressed concern that rising inequality, challenges around inclusion in public discourse and politics, and a perceived distancing from neighbours and allies may be making the aspirational ideal of the American Dream feel less attainable for some.



MARKET MOOD: CHINA IN 2025

HOW CHINESE SEE THEMSELVES IN 2025

ARRIVING

China sees itself as having mostly **arrived at the point of true superpower status**, having made significant leaps toward developed nation status.

ACCELERATING

Continued **development, improvement and ownership of new sectors such as AI, seen as key to the global future.**

Increased focus on social and environmental issues that have until now been deprioritized

CONFIDENT

Feeling less reliance on other nations for food supply in anticipation of trade conflict, **Chinese citizens feel well placed to survive trade wars as well as military preparedness** for armed conflict.

UNDERESTIMATED

Political narratives about China mean that citizens think that **much of the world continues to look down on and underestimate their achievements**, and are unaware of China's true development, capabilities and progress.



HOW PERCEPTIONS HAVE EVOLVED SINCE 2023

INFLUENCE

Increased vs 2023

Notable confidence in China's status in economy and military terms as being well and truly America's equal now. A view that the RMB may emerge to be the global currency in decades ahead.

Many see China as a peacemaker in a time of economic attacks from the US.

Regional influence in a time of global conflict e.g. Russia's reliance, adds to China's influence.

CONNECTION

Increased vs 2023

As the US steps away from its role as global arbiter, China is to some extent able to take up more of that role, however, the narrative of China as the key threat to the West means connection remains constrained.

Meanwhile the continued expansion via the Belt and Road Initiative grows connection across Asia, Africa and the Middle East.

ASPIRATION

No change vs 2023

Continued sense of competition between China and the West, as well as competing regional nations (e.g. India) means Chinese citizens feel much of the world mischaracterises or simply ignores the reality of China in 2025, meaning aspiration is limited to China's riches, not their society.



MARKET MOOD: THE UK IN 2025

HOW THE BRITISH SEE THEMSELVES IN 2025

EXCELLENCE

Pride remains in the UK's **capability to be a centre of excellence**. Leadership in the arts, science, education and healthcare are all seen as national strengths. The nation's **heritage remains a draw** for tourism and key to identity.

UNCERTAIN

Following decades of austerity, there remains **uncertainty about the future, with economic pressure being felt** on households, a weak job market and **low consumer confidence**.

REGRESSING

Funding of healthcare, education and other infrastructure is still believed to be insufficient, and **a sentiment of the country as 'crumbling'** shows a significant groundswell of concern.

CONFLICTED

Questions over the national identity remain post-Brexit. Trade conversations with the US and taking a leadership stance along with France and Germany over Ukraine all raise **questions as to what the UK's role and identity is in 2025**.



HOW PERCEPTIONS HAVE EVOLVED SINCE 2023

INFLUENCE

Decreased vs 2023

Whilst taking a leadership role over Ukraine illustrates the UK's potential for influence, relationships with the US show how influence has eroded more broadly. There is a sense that economic challenges at home are indicative of the UK's waning influence overall.

CONNECTION

No change vs 2023

Connection to the world seen as no greater or lesser than 2023, however nature and relationships themselves have evolved, as the transatlantic relationship weakens and the need for alignment with Europe increases.

ASPIRATION

Decreased vs 2023

Domestically, there is a feeling that the reality of life in the UK is not as appealing as has always been thought, with economic challenges pronounced, and younger generations feeling the future sold to them is not materialising.

However, citizens remain proud of its rich culture, excellence of education and industry that many seek to emulate.



MARKET MOOD: AUSTRALIA IN 2025



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HOW AUSTRALIANS SEE THEMSELVES IN 2025

STABLE

Despite challenges at home, there's **reassurance of how quality of life is generally high in Australia**. An equitable, developed democracy with a generally tolerant populace, in a world of chaos.

CAPABLE

Though flying under the radar on the world stage, there is local awareness and **pride in the country's strengths and successes**. Notable scientific and technological achievements as well as growing success in global entertainment.

LUCKY

Australians recognise how lucky they are to be where they are, with **high demand from overseas tourists and immigrants alike, plentiful opportunities, and bountiful resources** and natural wonders.

STAGNANT

Despite all the opportunity, achievement and appeal of Australia, there's **a perception that the country doesn't have a clear direction and is happy to follow rather than lead**, borrowing the ideas and politics of other nations



HOW PERCEPTIONS HAVE EVOLVED SINCE 2023

INFLUENCE

No change vs 2023

The sense remains that whilst Australia has many friends across the world, its influence is relatively limited by the scale of its economy, and the limited reach of its people and culture on the world stage.

CONNECTION

No change vs 2023

Tyranny of distance a perennial problem, but Commonwealth ties still the big link for cultural exchange in and out of Australia. Domestically, concern over cost of living and the increasing wealth divide is a growing concern with divisive political narratives increasing in the lead up to the election, particularly on the minds of urban Australians.

ASPIRATION

No change vs 2023

Australians recognise how lucky they are and see the demand of tourists to experience the life they've been blessed with.

Its multicultural society is seen as evidence of the aspiration to Australian life - a place to seek education and opportunity from other parts of the world, its *disconnection* serving to some extent in its favour.



MARKET MOOD: SINGAPORE IN 2025



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HOW SINGAPOREANS SEE THEMSELVES IN 2025

INNOVATIVE

Future-ready and technologically advanced, with strong momentum in **AI and climate initiatives**.

Culture of **innovation and adaptability** underpins ambitions to lead in **smart city development and sustainable growth**.

COHESIVE

Defined by **cultural diversity, safety**, and a **clean, green environment**. A shared sense of **order, inclusivity**, and pride in **public spaces** and **services** reinforces a **cohesive** and **resilient** social fabric.

TRUSTED

Widely respected for **neutrality, strong governance**, and **global diplomacy**.

A strategic **bridge between East and West**, with a reputation for **stability, reliability**, and forward-thinking leadership in **finance** and **technology**.

STRAINED

Concerns are growing around **declining efficiency**, especially in **infrastructure**. **Long working hours, poor work-life balance**, and **rising inequality** are seen as threats to **well-being** and long-term **social cohesion**.



HOW PERCEPTIONS HAVE EVOLVED SINCE 2023

INFLUENCE

No change vs 2023

Continues to punch above its weight economically, diplomatically and in technological spheres; but it remains limited in global political and cultural influence due to its physical constraints.

CONNECTION

Improving vs 2023

Being the strategic bridge between East and West attracts multinational headquarters and positions Singapore as a financial hub. Digitally, they anticipate becoming a "smart nation" with integrated government systems and applications. Their multicultural identity, especially evident in their diverse food culture, further reinforces this connected self-perception.

ASPIRATION

Improving vs 2023

Driving aspirations beyond their current success, focusing on green technology, AI advancement, and improved work-life balance. Participants highlighted ongoing investments in data centres, solar energy, and climate initiatives while expressing desire for a less rushed lifestyle.



MARKET MOOD: INDIA IN 2025

HOW **INDIANS** SEE THEMSELVES IN 2025

PROGRESSING

Proud of the continued **rapid progress in development** and digitisation, and their role in tech advancements.

Manufacturing capabilities (e.g., surging Apple factories) is a source of pride. New infrastructure (e.g. highways, telco) are boosting national connectivity and global competitiveness.

INFLUENTIAL

Still see themselves as on the rise as an influential global voice. Talent emigrating worldwide and seen in leadership in roles in tech and IT seen as evidence of India's capability.

Modi's manoeuvres to position India as an **alternative to China** for global supply chains, a boon.

UNIFIED

Despite political conflicts, Indians largely identify as a **unified nation with multiculturalism** at its core – preserving centuries of history, festivals, cuisines, and **rich heritage** that continue to inspire local and foreign travellers to experience India firsthand.

CHALLENGED

Poverty, safety, hygiene, pollution, and corruption remain critical issues to solve. Deeply rooted **social attitudes** (esp. about women) remain regressive, limiting freedom and safety despite signs of modernisation. **Poor infrastructure upkeep** affects everyday life for many.



HOW PERCEPTIONS HAVE EVOLVED SINCE 2024

INFLUENCE

Improving vs 2024

Global influence continues to strengthen. Modi's ability to build and maintain strong global relationships is highly commended, a key indicator of power. Economic outlook remains relatively high despite ongoing uncertainties with the US (tariffs). Locals also point to India's booming manufacturing sector, a sign of the country's rising status as a regional counterweight to China.

CONNECTION

No change vs 2024

Remains unchanged vs 2024, with strong connections across the world through a large diaspora bringing culture and sector expertise and remaining a desirable tourist destination to many.

ASPIRATION

No change vs 2024

India's rich heritage, low living cost and rapid rise mean citizens see the country as a beacon to many countries, particularly regionally. Their education system and achievements in space technology showcase how much potential the country has, evidenced by recent global trade and manufacturing investment.



MARKET MOOD: JAPAN IN 2025



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HOW JAPANESE SEE THEMSELVES IN 2025

QUALITY

Immense pride in commitment to craftsmanship and perfectionism. Meticulous attention to detail and **continuous innovation in manufacturing and tech** are defining characteristics that **have earned global respect**, particularly in electronics and auto industries.

TRADITION

Rich cultural heritage, with seasonal celebrations, and traditional arts - there exists **strong connection to historical culture while acknowledging the delicate balance between preserving tradition and embracing modernity** in a globalised world where younger generations seek new experiences.

SAFE

Being **clean, orderly and secure** considered distinctive national traits. The reliability of systems and services, **predictability of daily life, and the general sense of social harmony create a comfortable living environment** despite the pressures of urban existence.

CHALLENGED

Issues with **work-life balance, aging population** and ongoing **economic concerns**. Locals feel these **structural problems** may impact the country's future prospects and international competitiveness, generating both concern and hope for necessary reforms.



HOW PERCEPTIONS HAVE EVOLVED SINCE 2022

INFLUENCE

Declining vs 2022

Economic challenges and an aging population are factors limiting influence. While there is still pride in craftsmanship, there is growing recognition that countries like South Korea have gained ground in cultural influence.

The nation's reputation for classical arts and manufacturing excellence is becoming less relevant amid modern trends and global competition.

CONNECTION

No change vs 2022

There is a feeling that the country is becoming increasingly isolated, with concerns about economic decline. Society is seen as introverted, with people described as "not as active" compared to other cultures. Cultural insularity means many feel there is limited awareness of global trends beyond American influence.

ASPIRATION

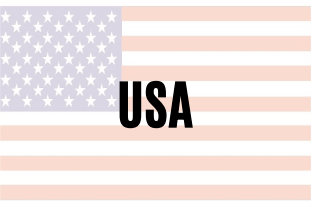
Declining vs 2022

Whilst the preservation of culture and heritage combined with global excellence in production are strengths, the balance may have become too one sided, becoming too disconnected from an increasingly global world.

Economic and population challenges, plus the success of regional neighbours leave the feeling that Japan is stagnant and less aspirational to outsiders than it once was.



HOW NATIONS SEE THEMSELVES IN 2025, AND WHAT'S CHANGED

	 USA	 CHINA	 UK	 AUSTRALIA	 SINGAPORE	 INDIA	 JAPAN
HOW THEY SEE THEMSELVES	INNOVATIVE REGRESSIVE UNCERTAIN INEQUITABLE	ARRIVING ACCELERATING CONFIDENT UNDERESTIMATED	EXCELLENCE UNCERTAIN REGRESSIVE CONFLICTED	STABLE CAPABLE LUCKY STAGNANT	INNOVATIVE COHESIVE TRUSTED STRAINED	PROGRESSING INFLUENTIAL UNIFIED CHALLENGED	QUALITY TRADITION SAFE CHALLENGED
WHAT'S CHANGED VS 2022/23/24	▼ INFLUENCE ▼ CONNECTION ▼ ASPIRATION	▲ INFLUENCE ▲ CONNECTION - ASPIRATION	- INFLUENCE - CONNECTION - ASPIRATION	- INFLUENCE - CONNECTION - ASPIRATION	- INFLUENCE ▲ CONNECTION ▲ ASPIRATION	▲ INFLUENCE - CONNECTION - ASPIRATION	▼ INFLUENCE - CONNECTION ▼ ASPIRATION

GROWING STRENGTH
UNCHANGED
GROWING ISSUE

△ IMPROVEMENT vs 2023
□ NO CHANGE vs. 2023
▼ DECLINE SINCE 2023

Note: previous research in Japan in 2022, was not conducted by Fiftyfive5

UNDERSTANDING SOFT POWER METRICS



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KEY INDICATORS OF NATIONS KNOWN FOR HAVING RICH HERITAGE



HAVE STRONG VISUAL IDENTITY

Nations with rich heritage are easy to conjure in consumers minds. Their heritage is tangible, visible and visceral to international consumers.



HERITAGE IS PRESERVED

Nations that preserve and protect longstanding traditions, rituals and practices, visible in daily life. They recognise how important they are to the country and people.



HERITAGE IMPACTS BEYOND THEIR BORDERS

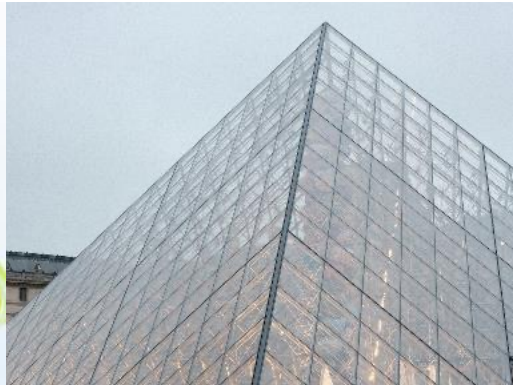
Rich Heritage that is seen as important, iconic or influential beyond just the confines of the country in question. Heritage that has influenced cultures, countries, world events and more.



HERITAGE IS INTEGRAL TO THE EXPERIENCE

Rich Heritage is something that people want to experience when visiting or interacting with a country. Heritage is part of everyday life in the country.

KEY INDICATORS OF NATIONS KNOWN FOR INFLUENCE IN ARTS & ENTERTAINMENT



THEIR SCALE CAN'T BE IGNORED

Prolific output that leads to domination.
The biggest hubs of a particular industry, promoting and dominating across borders, languages.

THEY BUILD THE STAGE

Whether virtual or physical, they create and play host to the stages that the biggest artists and performers seek out to find their success.

THEIR CULTURE IS UNMISTAKEABLE

Homegrown style, genre and aesthetics that is owned by and born of a distinct culture and place.

THEY CREATE CULTURAL SHRINES & INSTITUTIONS

Their homegrown arts and cultures are celebrated in institutions and shrines that highlight and showcase them to the world, and maintain and reinforce their importance.

THEY CREATE CULTURAL IDOLS

Culture and industries that produce celebrities and idols to personify and embody the culture that created them.

KEY INDICATORS OF NATIONS KNOWN FOR LOVED BRANDS & PRODUCTS



THEY HAVE CULTIVATED EXPERTISE

Nations that have a strong, well known association of history, expertise and specialism in a sector.

Nations that are the sector benchmark by which the rest of the world is measured.

THEY ARE SECTOR INNOVATORS

Nations that are seen to have either created entire new sectors (e.g., virtual and service-based connected tech) or bring big new ideas and disruptions to existing ones.

THEY PLAY IN SECTORS THAT EXCITE

Nations that are associated with strong brands in sectors consumers care about – that impact how they live, work, play and feel.

THEY PRODUCE AND PROMOTE AT SCALE

Nations that invest in promotion, success and domination of their brands, sectors through volume of brands created and supported, and mass marketing that drives ubiquity.

THEY ARE SECTOR FACILITATORS

Nations that produce for the world and make things happen. They provide access through scale, affordability or unique platforms.

SOFT POWER PERCEPTIONS AND NEW ZEALAND

A snapshot of how our priority markets rate New Zealand on the three soft power attributes: rich heritage, influence in arts & entertainment, and loved products & brands.

Why it matters

- Soft power equity underpins a country's ability to attract investment, market its products and services, draw tourists, and win talent.
- New Zealand's currently low spontaneous associations create an untapped opportunity for exporters to make a stronger impression.

SPONTANEOUS ASSOCIATIONS BETWEEN NEW ZEALAND AND THESE SOFT POWER METRICS ARE VERY LIMITED



HAS RICH HERITAGE

Some perceptions exist of New Zealand as a place with rich heritage, though in most markets, it's informed by superficial knowledge and assumptions.

Therefore, New Zealand is seen as ranking lower than other nations in being a place with Rich Heritage.

Perceptions of Rich Heritage that do exist are driven primarily by awareness of Māori culture in arts and entertainment touchpoints – particularly the All Blacks – and **some perceptions that Māori culture is reasonably prominent in New Zealand society**.



INFLUENTIAL IN ARTS & ENTERTAINMENT

Low levels of knowledge or unprompted associations with New Zealand across all markets, with **many prominent figures not known to be connected with New Zealand**.

Equity of Lord of the Rings and Hobbit franchises remains most top of mind, but **New Zealand is primarily known as the setting, scenery and backdrop for moviemaking rather than the minds behind the films' creation**.

This equity is beginning to show signs of 'aging out' and being lost to new generations.



PRODUCTS & BRANDS THE WORLD LOVES

Very limited knowledge of New Zealand brands across all markets, with food and beverage products being the dominant association.

Most markets know New Zealand as a leading or trusted producer of:

Dairy
Wool
Mānuka honey
Wine
Chocolate
Kiwifruit

METRIC SUMMARY: STRENGTH OF SPONTANEOUS ASSOCIATIONS WITH SOFT POWER METRICS AND NEW ZEALAND BY MARKET

	 AUSTRALIA	 UK	 US	 CHINA	 SINGAPORE	 INDIA	 JAPAN
HAS RICH HERITAGE	KNOWLEDGE OF MORE PROMINENT FIRST NATIONS HERITAGE: Māori culture, the presence of language, but view that colonisation has dominated the culture	LOW LEVEL KNOWLEDGE OF MĀORI CULTURE: Awareness of Māori culture, perceived unique art style.	LOW LEVEL KNOWLEDGE, MENTIONS OF: Māori people, language, the Haka, and a belief in caring for the environment. Some mention of cricket and rugby culture		LIMITED ASSOCIATIONS: Low mentions of Māori people, the natural environment		VERY LIMITED KNOWLEDGE: Natural heritage of the landscape, and an agricultural history
INFLUENTIAL IN ARTS AND ENTERTAINMENT	ABLE TO CITE EXAMPLES, BUT LOW SENSE OF INFLUENCE: <i>PEOPLE:</i> Peter Jackson, Taika Waititi, Lorde, Kimbra, Brooke Fraser <i>SHOWS:</i> What we do in the Shadows, Top Of The Lake <i>SPORT:</i> All Blacks, Netball teams	LIMITED KNOWLEDGE OF EXAMPLES: <i>Setting</i> for Lord of the Rings Hobbiton, Hunt for the Wilderpeople, very low awareness of Lorde, Rose Matafeo	LOW LEVEL MENTIONS OF: Lorde, Taika Waititi, Rugby and the Haka, Alien Weaponry, Lord of the Rings, Xena	LIMITED ABILITY TO RECALL ASSOCIATIONS: Minimal recall of Lord of the Rings, and movie sets (Hobbiton) One mention of Wētā Workshop in India and one mention of VFX expertise in Japan Mentions of the Haka, assumed to be entertainment rather than ceremony			
PRODUCTS & BRANDS THE WORLD LOVES	RANGE OF EXAMPLES, BUT LIMITED WEIGHT OF ASSOCIATION: Whittaker's chocolate; Air New Zealand, Craft beer, Sauvignon Blanc, Mānuka Honey, Dairy, Zivi petfood, Macpac, Fisher & Paykel, Kowtow	LIMITED SELECTION OF PRODUCT TYPES: Marlborough Sauvignon Blanc, Lamb, Mānuka honey, Dairy / Anchor, the All Blacks	VERY LIMITED PRODUCT ASSOCIATIONS: Kiwifruit, wine, red meat, Air New Zealand.	STRONG PRODUCE ASSOCIATIONS, EQUITY: Mānuka honey, Dairy / Anchor, Zespri, Merino Wool, A2 milk, Fish Oil	WIDER RANGE OF BRANDS, BUSINESSES AND PRODUCTS KNOWN: Air NZ, Whittaker's, Banks, Dairy – Fonterra, Tip Top. Cloudy Bay/Wine, Lamb, Zespri, Mānuka, Antipodes skincare, The All Blacks.	EXTREMELY LIMITED AND LOW-LEVEL ASSOCIATIONS: Kiwifruit, Mānuka, Sauvignon Blanc, Dairy, Chocolate, coffee	EXTREMELY LIMITED AND LOW-LEVEL ASSOCIATIONS: Zespri, Antipodes, Icebreaker



STRONG ASSOCIATIONS



LIMITED ASSOCIATIONS



MINIMAL ASSOCIATIONS

SOFT POWER PERCEPTIONS AND NEW ZEALAND



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RICH HERITAGE SUMMARY: STRENGTH OF ABILITY TO RECALL ASSOCIATIONS WITH SOFT POWER METRIC AND NEW ZEALAND



HAS RICH HERITAGE

KNOWLEDGE OF MORE PROMINENT FIRST NATIONS HERITAGE:
Māori culture, the presence of language, but view that colonisation has dominated the culture

LOW LEVEL IDEAS OF MĀORI INFLUENCE:
Awareness of Māori culture, perceived unique art style.

Some perception of having rich heritage. Connection to colonial history, a belief in New Zealand's comparatively better representation of Māori people and culture. However, limited citable examples of how this manifests.

LOW LEVEL KNOWLEDGE, MENTIONS OF:
Māori people, language, the Haka, and a belief in caring for the environment.
Some mention of cricket and rugby culture

EXTREMELY LIMITED ASSOCIATIONS:
Low mentions of Māori people, the natural environment

VERY LIMITED KNOWLEDGE:
Natural heritage of the landscape, and an agricultural history

Awareness of Māori culture as being the distinct and rich element of New Zealand's culture.

Pākehā / European culture in New Zealand seen as dominant, but offers no evidence of distinctive heritage or culture that stands out in these markets.

HOW NEW ZEALAND IS PERCEIVED ON INDICATORS OF HAVING A RICH HERITAGE



HAVE STRONG VISUAL IDENTITY

Beyond the landscapes, no clear vision of what the New Zealand experience looks and feels like. Some awareness of tā moko and Pacific Island culture/aesthetics, but not seen as representative of New Zealand as a nation.



HERITAGE IS PRESERVED

Colonial history is the overwhelming narrative that (negatively) influences perception of preservation. However, comparatively greater presence and pride in first nations culture than other colonised nations.



HERITAGE IMPACTS BEYOND THEIR BORDERS

Mostly little known examples (e.g., the Haka) and these are not at the scale of a movement or philosophy that impacts outside of New Zealand.



HERITAGE IS INTEGRAL TO THE EXPERIENCE

A visit to New Zealand is imagined to be an experience of the natural heritage of the country's geography, but with no great or distinctive cultural immersion unless actively sought out.

IN CONTEXT PERCEPTION OF NEW ZEALAND'S RICH HERITAGE IS COMPARATIVELY LIMITED

AWARENESS BUT NO DEEP UNDERSTANDING OF MĀORI CULTURE

Like the USA, New Zealand is **seen as a young and colonised nation and as such is seen to lack a culturally unique way of life** vs. other Western nations, that drives interest to visit and experience.

However, **belief that Māori people and culture are comparatively prominent in New Zealand life provides a key point of difference.**

Knowledge is limited to a small selection of identifiable cues – the Haka, the aesthetics of tā moko, and a belief that the culture respects and cares for the natural heritage of the country. **But the sense of heritage is limited, as tangible examples are scarce** of how this culture influences and shapes the modern New Zealand experience.

Māori culture is the key point of interest and difference in New Zealand's heritage. People want to see more, but currently don't understand it deeply or know where and how it shows up.

"I saw a video of the MP doing that Māori thing (haka) in their assembly...I draw the dots, they have Antipodes (brand) that is very high-quality skincare and we have similar brands in India deeply rooted in Ayurveda, so they may have their own thing"

- 18-34 years, India

"It doesn't have much history, does it? And so where is the heritage?"

18-34 years, China

"It's too western, it feels like Sydney when you go over to Auckland."

35-54 years, Australia

ILLUSTRATIONS OF NEW ZEALAND'S HERITAGE THAT SHOWCASED THE FOLLOWING TRAITS

PRIDE



Evidence we are **PROUD** of our culture, people and history (heritage)

- America's Cup - waka accompanying the competing boat.
- Use of Te Reo Māori in everyday life, road signs and everyday conversation.
- Haka in New Zealand parliament.

INTENT



Showing **INTENT** to preserve and celebrate our culture and heritage

- Apple Maps incorporating Māori language, places.
- Use of AI to preserve Te Reo.
- Festivals such as Te Matatini, embrace of the Haka.

EMBRACE BICULTURALISM



Show how we **EMBRACE** and **INCORPORATE** different culture and worldviews

- Interweaving Māori worldview, for example legal personhood status of Mount Taranaki and Whanganui river.
- Care for environment and place as an embrace of Māori relationship with the land and water, such as Tiaki Promise.
- Dual language signage.

REFLECTS VALUES



Reflect the **VALUES** that make us unique

- Women's suffrage and first right to vote.
- Anti-nuclear stance.
- Care for the environment.

HAS RICH HERITAGE: SO WHAT?

WHAT WE HEARD

- Perceptions of New Zealand's heritage is limited to mostly that of European, colonised culture.
- Most believe a visit to New Zealand will not be a cultural immersion of interest to tourists ('Australia-lite'), with a built environment that doesn't reflect a unique culture.
- Brands, arts, and other cultural pillars of New Zealand are seen as lacking.
- Māori culture is a valuable point of difference but prominence in society is only seen in glimpses.

WHAT IT MEANS

- Consumers in **key export markets are interested in seeing more of Māori culture**, as it is key to the perception of New Zealand as a country with Rich Heritage.
- Our **bicultural society needs to be visible and tangible to the outside world**; it is seen as a truly unique aspect of New Zealand's culture, and a reflection of our values.
- This needs to take the form of visible **voices, platforms and infrastructure that represents shared culture** and heritage.

Understanding, embracing and celebrating both our differing and shared history reflects the values presumed to be at the heart of New Zealand society, and is what makes us unique to the rest of the world. Promoting this is key to establishing meaningful and interesting heritage.

ARTS & ENTERTAINMENT SUMMARY: STRENGTH OF ABILITY TO RECALL ASSOCIATIONS WITH SOFT POWER METRIC AND NEW ZEALAND



INFLUENTIAL IN ARTS AND ENTERTAINMENT

ABLE TO CITE EXAMPLES, BUT LOW SENSE OF INFLUENCE:

PEOPLE: Peter Jackson, Taika Waititi, Lorde, Kimbra, Brooke Fraser
SHOWS: What we do in the Shadows, Top of the lake
SPORT: All Blacks, Netball teams

LIMITED KNOWLEDGE OF EXAMPLES:

Setting for Lord of the Rings
Hobbiton, Hunt for the Wilderpeople.
Very low awareness of Lorde, Rose Matafeo

LOW LEVEL MENTIONS OF:

Lorde, Taika Waititi, Rugby and the Haka, Alien Weaponry, Lord of the Rings, Xena

EXTREMELY LIMITED ABILITY TO RECALL ASSOCIATIONS:

Minimal recall of Lord of the Rings, and movie sets (Hobbiton)
One mention of Wētā Workshop in India and one mention of VFX expertise in Japan
Mentions of the Haka, assumed to be entertainment rather than ceremony

Small, limited sample of performers or productions known as being from New Zealand.
Mostly not well known as reflecting a unique national point of view, traits or characteristics.

Asian markets with significant language and cultural barriers means only a small handful of productions are associated with New Zealand.
When shown examples, some actors and performers are known, but are viewed as simply more examples among many Western performers.

HOW NEW ZEALAND IS PERCEIVED ON INDICATORS OF BEING INFLUENTIAL IN ARTS & ENTERTAINMENT



THEIR SCALE CAN'T BE IGNORED

No known industry scale or dominance. Contrast is drawn to other bigger markets that are the home of arts sectors or produce at great volumes.



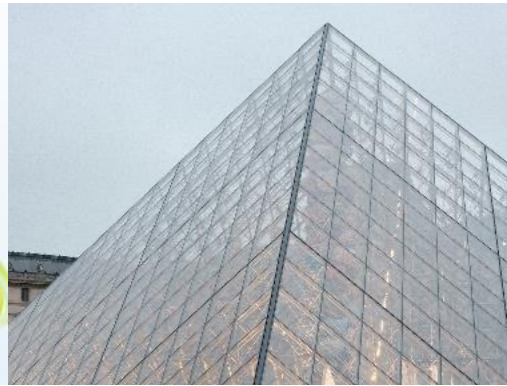
THEY BUILD THE STAGE

No leading industry, platform, sports league or arts centre that the world looks to as host or tastemaker. Most performers from New Zealand must go overseas to have a chance of success on the biggest stages.



THEIR CULTURE IS UNMISTAKEABLE

Perceived as primarily an ethnically European country, with little cultural contrast to other Western countries. Some awareness of Māori as a relatively present culture in society, but limited knowledge of the impact on New Zealand life and culture.



THEY CREATE CULTURAL SHRINES & INSTITUTIONS

Little to no knowledge of institutions that compare to those in the Americas, Europe or Asia in scale or with influential history or heritage that puts them on the radar of potential visitors.



THEY CREATE CULTURAL IDOLS

Little awareness across most markets of iconic New Zealand performers that carry the torch for the country and culture. Any known individuals lack scale of success across all markets and compete with volume of stars produced elsewhere.

LACK OF SCALE AND FOCUS HOLD BACK NEW ZEALAND'S PRESENCE AND INFLUENCE

PARTICIPATION ≠ INFLUENCE

Whilst some markets are surprised (or reminded!) to see famous faces from New Zealand, the **volume of examples and diversity of sectors and roles we can showcase is insufficient to make a clear link between New Zealand and arts & entertainment.**

Further, awareness drops off almost completely when bridging a significant language and cultural gap to Asian markets.

As with brands, connecting a country with the sector requires visible, attributable presence of New Zealand performers and practitioners, promotion that is intentional and by design (e.g. American celebrity culture, South Korean idol creation). Kiwi humility, and lack of budgets, can hold us back further from establishing presence.

THROUGHLINE TO NEW ZEALAND

Beyond scale, **performers and their success need to be explicitly linked with New Zealand.** Simply participating on the world stage is not enough – success should be seen as a result of New Zealand's unique attitude, humour, style.

Performers need to be not just *from* New Zealand but *OF* New Zealand.



"I don't know many artists, actors or movie directors from New Zealand. I just kind of saw them [the examples shown] as Western people."

35-54 years, Japan

"I feel like any country could collate a similar selection of examples [to New Zealand] of people who are famous, but it doesn't mean they're an influential country."

35-54 years, UK

HAS RICH HERITAGE: SO WHAT?

WHAT WE HEARD

- New Zealand is mostly known only for landscapes and backdrops. In Asian markets, we can be categorised as just 'other Western performers'.
- Our successful performers are too few, too disparate to coalesce in consumer minds as influential or dominant.
- Many success stories are not highly visible to consumers, operating behind the scenes/cameras or in more niche sports (rugby, sailing).
- We're not the originator or host of any known platform, sector, genre or style.

WHAT IT MEANS

- Arts & entertainment sectors need support and investment. **Talent alone doesn't pay back to the country like established and visible sectors.**
- To drive influence, New Zealand's arts & entertainment sectors **need to show what we originate and create, not just that we can emulate others, or be the backdrop for other's creations.**
- Influence **needs to be attributable to New Zealand – consumers must know it when they see it.** This means promoting what is unique in our stories and culture.

Arts & entertainment is an expression of and platform for a nations culture, talent and creativity, but only builds equity to the country if it is unique, identifiable and attributable to the people and place that created it.

LOVED PRODUCTS & BRANDS SUMMARY: STRENGTH OF ASSOCIATIONS WITH SOFT POWER METRICS AND NEW ZEALAND

PRODUCTS &
BRANDS THE
WORLD LOVES



AUSTRALIA

**RANGE OF EXAMPLES,
BUT LIMITED WEIGHT OF
ASSOCIATION:**

Whittaker's chocolate; Air New Zealand, Craft beer, Sauvignon Blanc, Mānuka Honey, Dairy, Zivi petfood, Macpac, Fisher & Paykel, Kowtow



UK

**LIMITED SELECTION OF
PRODUCT TYPES:**

Marlborough Sauvignon Blanc, Lamb, Mānuka honey, Dairy / Anchor, the All Blacks



US

**VERY LIMITED PRODUCT
ASSOCIATIONS:**

Kiwifruit, wine, red meat, Air New Zealand.



CHINA

**STRONG PRODUCE
ASSOCIATIONS, EQUITY:**

Mānuka honey, Dairy / Anchor, Zespri, Merino Wool, A2 milk, Fish Oil



SINGAPORE

**WIDER RANGE OF
BRANDS, BUSINESSES
AND PRODUCTS KNOWN:**

Air NZ, Whittaker's, Banks, Dairy – Fonterra, Tip Top. Cloudy Bay/Wine, Lamb, Zespri, Mānuka, Antipodes skincare, The All Blacks.



INDIA

**LIMITED AND LOW-LEVEL
ASSOCIATIONS:**

Kiwifruit, Mānuka, Sauvignon Blanc, Dairy, Chocolate, coffee



JAPAN

**LIMITED AND LOW-LEVEL
ASSOCIATIONS:**

Zespri, Antipodes, Icebreaker

**Some established knowledge of
categories and a small handful of
named brands.**

**Driven more by geographic and/or
cultural proximity.**

**The markets with the clearest
sense of a brand proposition for
New Zealand, anchored in a clean,
trustworthy, stringent approach to
produce.**

**Comes at the cost of perceptions of
New Zealand's development in
other areas.**

HOW NEW ZEALAND IS PERCEIVED ON INDICATORS OF BEING A PRODUCER OF **LOVED PRODUCTS & BRANDS**



THEY HAVE **CULTIVATED EXPERTISE**

No known high-level association of industry, craft, or sector expertise beyond primary industries (PI). PI / Agriculture provides little knowledge or expertise that differentiates beyond purity, based mostly on geography.

THEY ARE **SECTOR INNOVATORS**

Recognition that brands shown as being of New Zealand origin may be successful, but don't show meaningful innovation. However, some perception of an ethos of quality and sustainability is evident.

THEY PLAY IN **SECTORS THAT EXCITE**

Produce and B2B innovations don't elicit a sense of urgency or excitement for consumers. New Zealand is not seen or known to have an identity that satisfies consumers higher needs.

THEY PRODUCE AND **PROMOTE AT SCALE**

A small market that can't (or doesn't) promote as aggressively as other larger nations. Small population means groundswell of brand adoption is limited domestically.

THEY ARE **SECTOR FACILITATORS**

No platforms to produce or provide access to new products or experiences from New Zealand.

PRODUCE IS OUR GREATEST STRENGTH, BUT CAN ONLY TAKE PERCEPTIONS SO FAR

PRODUCE, NOT BRANDS, ARE NEW ZEALAND'S BEST KNOWN OUTPUT

Established as high quality, highly trusted, and with some category 'ownership' (lamb, sauvignon blanc).

However, expertise in primary industries can point to a ceiling in our capabilities.

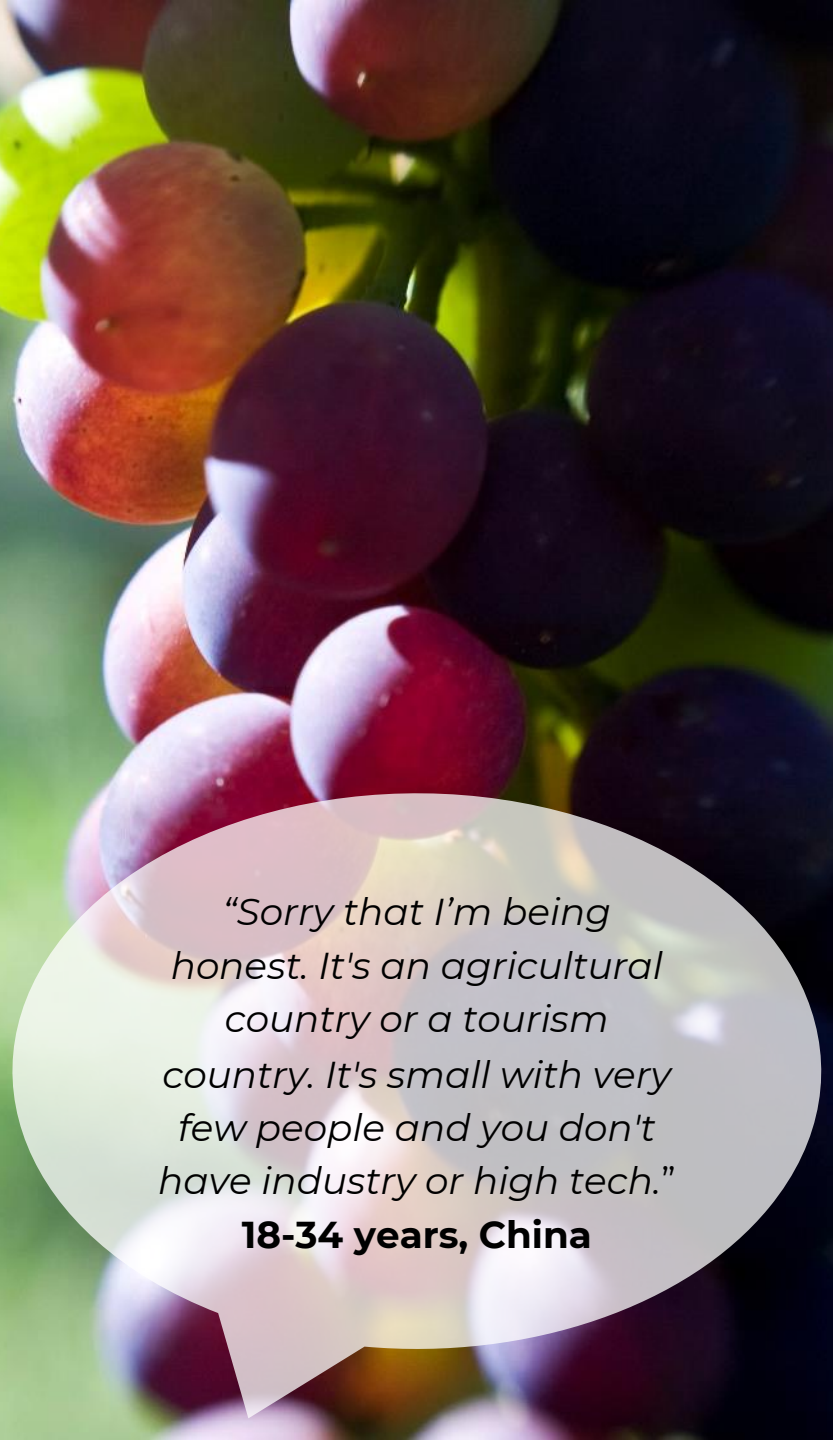
Equity underpinned by isolation, low population and the lack of high level urbanisation will always mean limited equity in secondary and tertiary sectors.

Agriculture and primary industries are the foundational outputs of a nation, but brands, culture and heritage are built on the wealth and freedom that results from this foundation.

New Zealand needs to start showcasing what we've done with this wealth.

There is potential to align primary sector expertise with secondary/tertiary sector knowledge via the likes of agritech, to show the human ingenuity and expertise at play and move these perceptions on.

However, more consumer-facing and exciting categories will be needed to meaningfully shape consumer perceptions within the sector.



"Sorry that I'm being honest. It's an agricultural country or a tourism country. It's small with very few people and you don't have industry or high tech."

18-34 years, China

HAS RICH HERITAGE: SO WHAT?

WHAT WE HEARD

- Consumers in key trading markets only know our produce, not our brands.
- Even if known, brands are rarely associated with New Zealand.
- Many globally successful examples are B2B, or in categories that don't visibly impact consumer lives.
- But...they see signs of New Zealand's unique values and equity in our brand portfolio which can offer a platform for unique identity within our brands.

WHAT IT MEANS

- Consumer brands need as much **promotion and scale as possible** to be on the radar of global consumers.
- To pay back to nation equity, **products and brands need to demonstrate a clear line back to New Zealand.**
- In New Zealand's successful brands consumers can see a unique and meaningful point of view – **our brands care about process, quality and their impact – in line with our national proposition.**
- Reputation requires multiple identifiable brands **succeeding at scale, repeated over time.**

Successful brands evolve out of, are part of, and reflect culture.
Brands with **impact, uniqueness, and that cut through the noise come from a culture that people want to see, experience and be a part of.**

SO WHAT, NOW WHAT?

How New Zealand exporters can turn these insights into an edge.

Why it matters

- Clear New Zealand branding, richer cultural storytelling and market-specific positioning can move us from being perceived as a commodity supplier to a premium partner, unlocking higher margins and deeper loyalty for New Zealand products.

ALL THREE SOFT POWER METRICS ARE ENTWINED, AND INFORM ONE ANOTHER

HERITAGE

History, culture, shared
experiences and beliefs



Products and brands are a
modern extension and a
new capitalistic platform for
countries to promote their
culture, skills and capabilities

Heritage informs the nature of
arts & entertainment, reflecting
history, experience, refinement
of culture, aesthetics and what
is deemed important to a
culture

PRODUCTS & BRANDS

Mass commercialisation of art,
entertainment and heritage

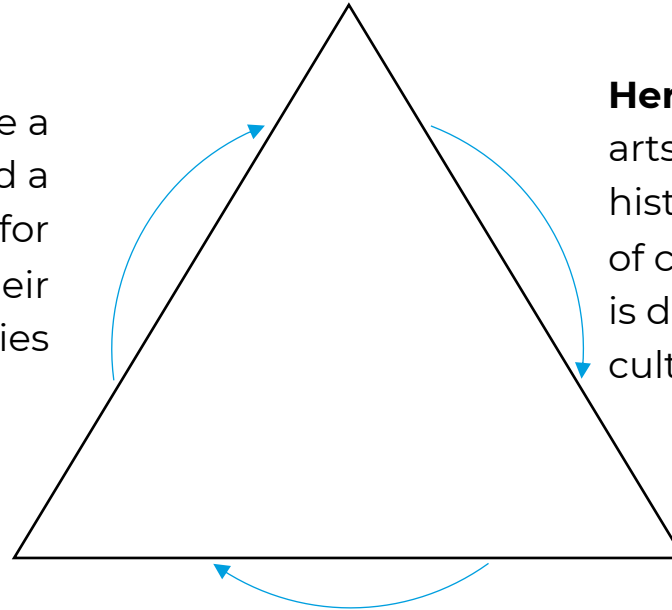


ARTS & ENTERTAINMENT

Expressions of culture,
heritage, character



Arts & Entertainment is an
outward expression of culture and
heritage, and a platform for
brands to build upon



SO WHERE IS NEW ZEALAND TODAY?

HERITAGE

History, culture, shared experiences and beliefs

1. New Zealand's distinctive and differentiating heritage is anchored in Māori culture and bicultural society.

This is largely missed by international audiences who from afar, see mostly an ethnically European culture and lifestyle, with little to differentiate itself from a visit to other Anglocentric nations.

Our economy is seen to be mostly agriculture and primary industries at the expense of known secondary or tertiary sectors that demonstrate where we are looking to develop further as a country.

3. New Zealand's brands struggle with cut-through and scale that makes sector equity difficult to establish at a national level.

Our produce is well known, but the brands we produce have not coalesced in the minds of consumers to be reflective of a particular national identity or skillset, as for many other nations. Coherence and focus on key cultural narratives would benefit all.

PRODUCTS & BRANDS

Mass commercialisation of art, entertainment and heritage

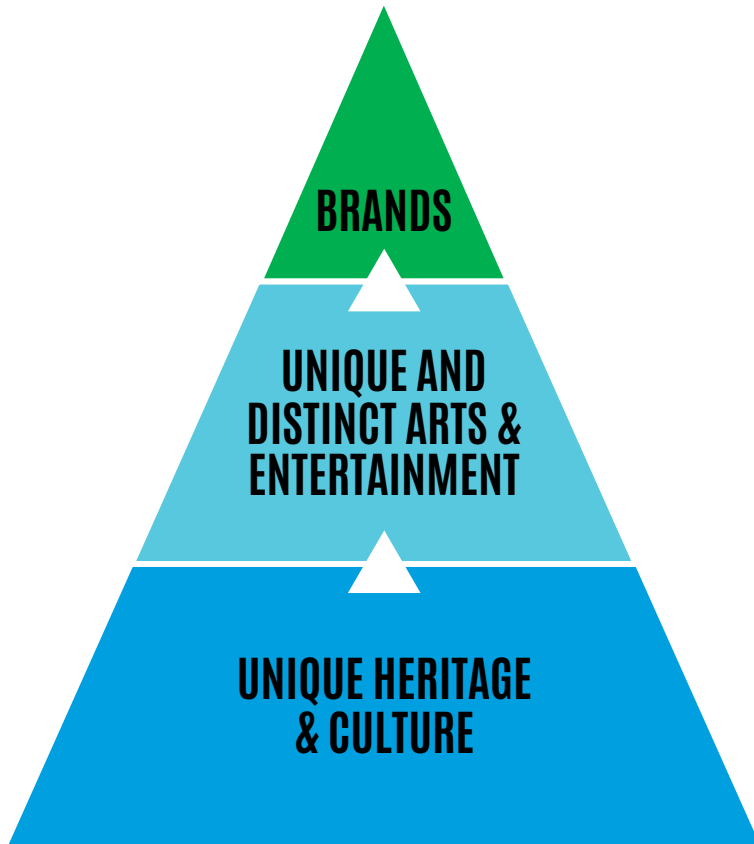
ARTS & ENTERTAINMENT

Expressions of culture, heritage, character

2. Arts & Entertainment in New Zealand struggles with small scale.

Our successes internationally are hard for consumers to link back to New Zealand. Arts and entertainment sectors need support to tell more locally grown stories that reflect New Zealand's people, place and culture, so audiences can envisage and define New Zealand art, entertainment and culture.

CREATING EQUITY STARTS WITH OUR UNIQUE CULTURE



When people can recognise and attribute our output back to New Zealand, reputation can be built, which brings influence.

Soft power metrics are a reflection of our **reputation and influence.**

Reputation is established through **consistent, identifiable and repeated** behaviours and output.

Having a reputation for influential arts, entertainment, products and brands the world wants to buy and experience, **flows from having a culture that people RECOGNISE as differentiated, unique, and aspirational, with clear values or worldview.**

WHAT CAN BE DONE TO BRIDGE THESE GAPS?



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AS IT RELATES TO THESE SOFT POWER METRICS, BUILDING REPUTATION AND BRAND EQUITY REQUIRES THREE THINGS:

1. Nurturing a unique culture that people recognise and are interested in.

Consistently building and promoting an image of New Zealand's unique bicultural society and values to shape a distinct image in consumer minds

2. Showcasing it via thriving arts and entertainment that reflects and reinforces our culture and identity.

Investing to bring to life that cultural richness; the exported expression of culture, values and creativity

3. Growing brands that benefit from the unique reputation and values of New Zealand that people recognise and aspire to.

Championing brands that leverage these beliefs, values and traits in their approach and point of difference, that pays back to the national identity and culture.

1. RICH HERITAGE IS THE FERTILE GROUND FOR GROWING CULTURE AND REPUTATION

New Zealand's rich heritage is not well known to most, but is of greatest interest where it is seen to be different to home nations or Western nations.

Māori history and culture is the most meaningful cultural distinction for New Zealand, but is not well understood.

What makes New Zealand unique is the bi-cultural society that has grown from a shared history between Anglo and Māori culture.

KEY IS:

- **Preserving** our shared cultural heritage
- Making the **bicultural experience integral** to life in New Zealand
- Continuing to promote and build distinctive **visual cues** from our bi-cultural roots

Behaviours that show New Zealand is proud of and intentional in its embrace of bicultural history, heritage and values, is key to establishing a point of view that arts, entertainment and brands can build upon.

2. PROMOTE ARTS & ENTERTAINMENT REFLECTING WHO WE ARE, AND HOW WE WANT TO BE SEEN

Establishing a nation's influence in arts & entertainment is difficult without scale.

Success of individuals on the biggest stages can be impressive for a small nation, but fails to pay back much equity to the country's reputation.

Influence comes from demand for the cultural offerings (arts & entertainment) we export to the world.

KEY IS:

- We must ensure our cultural outputs are **unmistakeable**
- We need to actively **celebrate and protect our culture**
- We must **celebrate people, stories and aesthetics** that embody our uniqueness

Arts & entertainment are the exports that tell the story of our culture and identity, showcase our values, and help fuel interest and demand in New Zealand.

2. BRANDS AND THE NATION BOTH BENEFIT WHEN CULTURE AND EQUITY IS ESTABLISHED

Brands are an effective way for our values, ideas and creativity to reach the world, but effectively connecting product with origin is crucial to strengthening national reputation.

The perceived thread of connection between many New Zealand brands is purity, minimal impact, sustainability and wise use of natural resources.

This reflects what people think are central ideas in New Zealand culture, and builds on equity of our primary industries.

IMPORTANT BECAUSE:

- This can be an area in which New Zealand can **cultivate expertise**
- Other nations will demand more **innovation** that uses sustainable approaches
- Is an area many countries feel they lag. Innovation here can help New Zealand get ahead and **facilitate** sustainable, and innovative technologies.

Reputation as a producer of loved brands is possible however, this requires consistent delivery in visible sectors with repeatable and reliable messaging, ethos and expertise.

SUCCESS RELIES ON CONSISTENCY AND DISTINCTIVENESS

WE NEED TO ENSURE OUR OUTPUTS ARE:

VISIBLE

New Zealand outputs need to be seen globally; well promoted, proud and confident.

- Aesthetics, ideas and approaches that build on perceived national identity and values today.
- Well supported and playing out where consumers can see us.

OWNABLE

Our goods and services need to be clearly and distinctly from and of New Zealand.

- Anchored in our bi-cultural society, doing things with pride in our culture, and intent to champion it.
- For products and brands this may be leveraging care for people, place and sustainability.

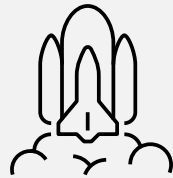
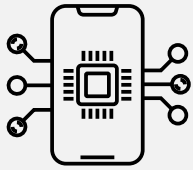
REPEATABLE

We must be consistent and considered in the sectors we play in.

Limited scale and budget means considered focus of investment in sectors we aim to build long term.

- Continually investing to grow at a sector level.
- Foster and promote success and expertise across multiple brands and examples, not just one-offs.

CONSISTENCY IN BEHAVIOURS STEMMING FROM OUR VALUES MUST BE AT THE HEART OF EVERYTHING WE EXPORT

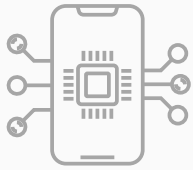


IN 2023, WE EXPLORED SOFT POWER DRIVERS OF **SCIENCE,
TECHNOLOGY & INNOVATION, SUSTAINABILITY AND SPACE.**

We learned there is credibility for New Zealand with potential at its greatest if our work reflects the values seen as inherent to our country; WHO we are, driving WHAT we do and WHY we do it.

**CARE FOR PEOPLE AND CONNECTION
TO PLACE DRIVES OUR INGENUITY**

PRODUCTS, BRANDS, ARTS AND ENTERTAINMENT STEM FROM CULTURE AND SHOULD SHARE THE SAME VALUES



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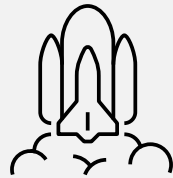
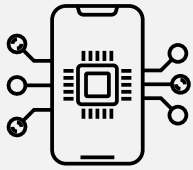


IN 2025, WE'VE EXPLORED DRIVERS OF **RICH HERITAGE, ARTS & ENTERTAINMENT, AND PRODUCTS & BRANDS**

Equity is currently low, however we have a unique cultural anchor that can drive interest and distinctiveness - a bicultural heritage and society.

Arts, entertainment, products and brands originating in New Zealand can build equity by reflecting our culture, heritage, and the values it represents.

CULTURE AND VALUES ARE AT THE HEART OF OUR PROPOSITION TO THE WORLD



IN 2023, WE EXPLORED SOFT POWER DRIVERS OF **SCIENCE, TECHNOLOGY & INNOVATION, SUSTAINABILITY AND SPACE.**



IN 2025, WE'VE EXPLORED DRIVERS OF **RICH HERITAGE, ARTS & ENTERTAINMENT, AND PRODUCTS & BRANDS**

Embrace of heritage and bicultural society is what defines New Zealand.

Care for people and place is in our DNA.

At best this is reflected in the approach and ethos of our products and brands, celebrated in arts and entertainment, and the driver of our ingenuity and innovation.



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NGĀ MIHI NUI THANK YOU



APPENDICES

RESEARCH METHODOLOGY



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THE RESEARCH: ONLINE QUALITATIVE GROUP DISCUSSIONS

WHAT

- 2-hour online groups of 6-7 respondents.
- Moderators were local or had deep market understanding.
- Conducted in local language with simultaneous translation in China and Japan.
- Use of stimulus to prompt and explore the topics.

RECRUITMENT CRITERIA

We recruited against several key criteria, to ensure productive conversations:

- Familiar with New Zealand (rated on a scale).
- Have travelled overseas to at least two different countries, and / or have lived overseas.
- Education levels above high school – some further education / study.
- Average or above household income in each market.
- Demonstrate an interest in global affairs / events / news, and some interest in the arenas of arts and entertainment and to ensure no anti-brand attitudes.



Australia



UK



USA



China



Singapore



India



Japan

	Australia	UK	USA	China	Singapore	India	Japan
Location 1	Sydney	London	Los Angeles	Beijing	Singapore	Mumbai	Tokyo
Location 2	Melbourne	Manchester	New York	Shanghai		Delhi	Osaka
Moderation language	English	English	English	Mandarin	English	English	Japanese
GROUPS	N=3	N=3	N=3	N=4	N=2	N=3	N=3

21 groups in total, across 13 locations in 7 markets



RESEARCH METHODOLOGY

Several key considerations regarding methodology

- This qualitative research was directed off the back of insights revealed through the statistical analysis of the Brand Finance Global Soft Power Index, undertaken with citizens in each nation. This qualitative research was similarly conducted with consumers of each nation as a continuance of the approach.
- All findings are based on qualitative discussion groups with small sample sizes. These discussions generate qualitative data that is rich in depth and insights, however, is unable to provide statistics. The qualitative data provides an understanding of the themes of relevance and supporting explanations.
- Comparing year-on-year trends of national identity will typically only show minor movements in perceptions. Certain events (e.g., pandemics, conflict, leadership changes) can accelerate perceptions, but gradual changes and year upon year similarities are to be expected.
- Within nations, opinions vary and can be driven by myriad factors (for example, geography, demographics, social strata, political beliefs et al.). Therefore, opinions are representative of themes within and across our conversations.

UNDERSTANDING SOFT POWER METRICS



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UNDERSTANDING SOFT POWER METRICS

1. HAS RICH HERITAGE

HOW IS RICH HERITAGE UNDERSTOOD

Largely driven by long history that is still visibly central to life in these nations.

Countries typically seen as having Rich Heritage:

- Japan
- Italy
- China
- India
- UK
- Egypt
- Greece
- Mexico



CULTURAL HOMOGENEITY

Rich heritage is much more apparent in nations with more singular cultures than multicultural melting pots.



LONG, VISIBLE HISTORY

Heritage is driven by visible, readily apparent examples – of a long and continuous culture via language, cuisine, and built environment.



LAYERED DIMENSIONS

Heritage is multi-faceted, not one-dimensional; heritage is seen as strongest when there are multiple tangible expressions.



CULTURAL EXPERIENCES

Strongest associations tied to a desire to visit and immerse in the cultural heritage of a country.

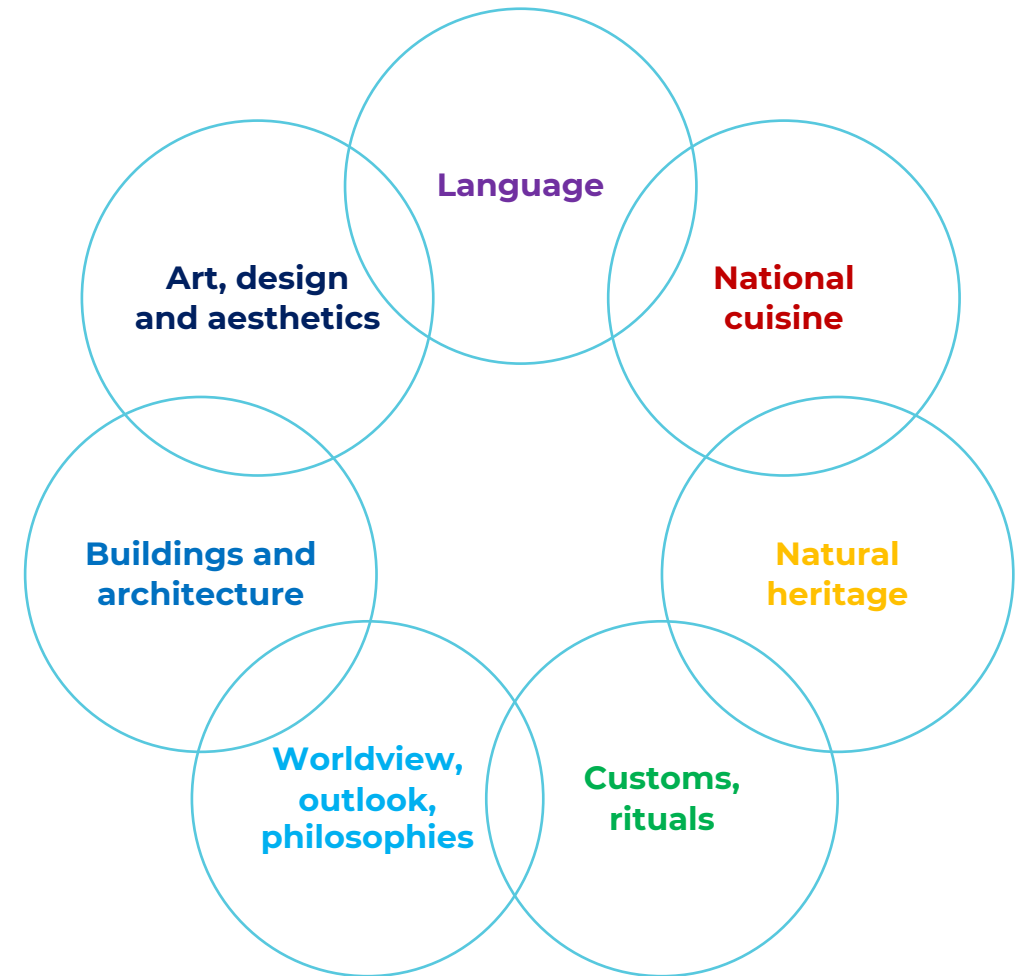
USA	UK	Australia	China	Singapore	India	Japan
High mentions of: Mexico, India, Italy, France, Greece, Germany, China, Great Britain Low mentions of: South Korea, Taiwan, Guatemala, Jamaica	High mentions of: Italy, India, China, Egypt Low mentions of: Portugal, New Zealand, Brazil, Morocco, Dubai, Nigeria	High mentions of: Japan, Italy, India, China, Great Britain, Egypt, Greece Low mentions of: Thailand, New Zealand, South Africa, Mexico, Turkey	High mentions of: China, Italy, New Zealand, Egypt Low mentions of: Turkey, Thailand, Greece, Great Britain, India	High mentions of: Japan, China, Italy, India, Egypt Low mentions of: New Zealand, Mexico, Great Britain, Mongolia	High mentions of: India, Egypt, Japan, China, Italy, Greece Low mentions of: Germany, Spain, Indonesia, Dubai	High mentions of: Egypt, Italy, China, Great Britain, France, Low mentions of: Finland, UAE, USA, Iceland, Cambodia, Australia, Chile

'RICHNESS' OF HERITAGE RESULTS FROM MULTIPLE POINTS OF EVIDENCE IN DAILY LIFE

Every nation has heritage, but richness exists where consumers can identify multiple points of evidence that combine to reinforce an idea of a place and culture.

This evidence tells stories and reflects the shared histories of the people of that place that has shaped the country.

Thus, rich heritage is the result of PEOPLE and their SHARED EXPERIENCES and RELATIONSHIP WITH A PLACE, that has created a distinct and identifiable cultural experience.



DESPITE STRENGTH IN BRANDS, PRODUCTS AND ENTERTAINMENT, USA IS ABSENT FROM THE HERITAGE CONVERSATION

HERITAGE REQUIRES CONTINUOUS CULTURAL STORIES

In the minds of consumers, rich heritage is most credible where continuation of cultural lineage is apparent and central to modern day life in that nation.

Colonised nations therefore struggle:

- The modern American story is that of the country post-colonisation, and first nations people and culture are unrepresented.
- Australia's indigenous culture is the world's oldest continuing culture (65,000 years), yet is not embraced and does not influence modern Australia overtly, and thus is less impactful as evidence of rich heritage.

For New Zealand, awareness and prominence of Māori culture in modern society is the key point of difference in telling a heritage story.



KEY INDICATORS OF NATIONS KNOWN FOR HAVING RICH HERITAGE



HAVE STRONG **VISUAL** **IDENTITY**

Nations with rich heritage are easy to conjure in consumers minds. Their heritage is tangible, visible and visceral to international consumers.

HERITAGE **IS PRESERVED**

Nations that preserve and protect longstanding traditions, rituals and practices, visible in daily life. They recognise how important they are to the country and people.

HERITAGE **IMPACTS** **BEYOND THEIR BORDERS**

Rich Heritage that is seen as important, iconic or influential beyond just the confines of the country in question. Heritage that has influenced cultures, countries, world events and more.

HERITAGE IS INTEGRAL **TO THE EXPERIENCE**

Rich Heritage is something that people want to experience when visiting or interacting with a country. Heritage is part of everyday life in the country.



HAVE RICH HERITAGE

HAS STRONG VISUAL IDENTITY

Pagoda's, Pyramids and Palaces. The ability to easily envisage and imagine the environment and experience of a particular country, specifically the unique natural, man-made and cultural elements.

Ability to envisage a distinct place implies:

- A nation with **unique culture, aesthetics and history, reflected in the experience of being there**. It is the manifestation of the heritage and culture of the people of a given place.
- **Built environments typically reflect the history**, trajectory, aesthetics and outlook of the nation, suggestive of past successes, ambitions, priorities and history.
- Particularly amongst consumers in the Asian markets, natural heritage is seen as a key facet of heritage; the unique land and features that a nation is blessed with. **Reflects a greater connection and sense of meaning and philosophy regarding the natural world.**

Having a unique, tangible and consistent identity is a significant factor in being seen by other nations as having rich heritage.



HAVE RICH HERITAGE

HERITAGE IS PRESERVED

Active and visible steps at preservation of history and heritage is a key indicator that a nation's heritage is rich, and that it is valued as not just history but part of what makes the country unique.

Preservation of heritage implies:

- Countries **have rich, unique and influential histories**, on show through buildings, rituals, practices.
- **They understand the value of heritage** to national identity, pride and togetherness.
- The populace **is proud of and celebrates their shared heritage** and history as something that unites them and defines their identity.

Preserving heritage reinforces the perception that their heritage is rich and of national if not global importance, and this display of pride makes it heritage others want to come to experience.



HAVE RICH HERITAGE

IMPACTS BEYOND THEIR BORDERS

Nations known to be influential on the future political or cultural direction of the region or the world.

Colonialism, empires, ancient powers and civilizations are the key indicators, but their relevance is most influential when these histories are preserved, showcased, or remain as part of the cultural identity today.

Impact is about showing how a nation has had influence on the world:

- Reflects what are accepted as **globally significant developments, achievements and movements.**
- Influence reaches across borders and cultures – learning in school about ancient civilizations (e.g., Ancient Egypt), cultural awakenings (e.g., the Renaissance), or new philosophies and thinking (e.g., Ancient Greece) reinforces the importance and depth of heritage of these places.
- Has **culture and heritage that the world wants to see and explore.**

Typically, this is reflective of very long timelines of continuous cultural narratives that continue to be celebrated in modern society or showcased to draw the attention of the world.



HAVE RICH HERITAGE

IS INTEGRAL TO THE EXPERIENCE

Ultimately, the perception that travel to a country will be an immersion in the heritage of that country and culture.

This shows up in countries where:

- Societies have **strong and longstanding cultural, ethnic, religious or similar heritage** in its population **that remains prominent in modern society.**
- Countries have a **high degree of ethnic homogeneity and cultural contrast** with the nation appraising it, e.g., Western nations looking beyond the anglophone world.
- Countries which have **prominent first nations culture that are part of the modern direction of the country.**

Consumers perceive a country's rich heritage as something that upon arriving in country, they will be able to fully immerse themselves in simply by being there – the environment, interactions, food, customs and practices of the country are meaningfully different to their own.

UNDERSTANDING SOFT POWER METRICS

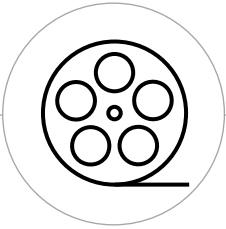
2. IS INFLUENTIAL IN ARTS & ENTERTAINMENT

HOW IS INFLUENCE SEEN IN ARTS & ENTERTAINMENT

Informed primarily by national sector 'ownership'

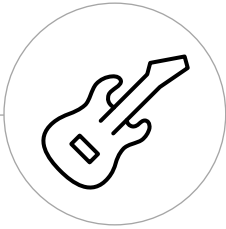
Countries typically seen as Influential in Arts and Entertainment:

- USA
- Korea
- Japan
- Italy
- France
- UK
- Scandinavian nations



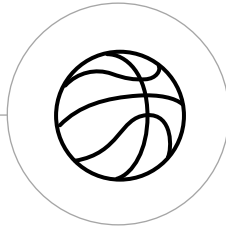
FILM & TV

Primary mass entertainment platforms – global output with franchises, reality TV exported around the world show influence.



MUSIC

History of producing globally successful artists and genres, or 'creation' of new styles (e.g., K-Pop) indicates influence.



SPORT

Less top of mind but sport as a platform for cultural influence. Productisation of sport a key source of increased reach (e.g., Drive to Survive).



WESTERN FINE ART

Nations with a known connection to informing the direction of art and culture (e.g., the Renaissance)



EASTERN / LOCAL TRADITIONAL ARTS

Particularly in Asian markets, sense of influence via homegrown traditional arts and entertainment.

USA	UK	Australia	China	Singapore	India	Japan
Consumers think of...: USA, Japan, France, Italy, Russia, China, South Korea, UK, Denmark, India, Puerto Rico, Mexico	Consumers think of...: USA, UK, South Korea, Japan, Italy, India, Jamaica	Consumers think of...: USA, Italy, France, South Korea, Japan, Scandinavia, India, Spain	Consumers think of...: Korea, France, USA, China, Italy, Netherlands.	Consumers think of...: USA, Japan, Great Britain, China, Italy, France, India, Russia	Consumers think of...: India, USA, Europe, South Korea, Dubai, Egypt, Singapore	Consumers think of...: Japan, USA, UK, South Korea, India, China, Italy, France

KEY INDICATORS OF NATIONS KNOWN FOR INFLUENCE IN THE ARTS & ENTERTAINMENT



THEIR **SCALE CAN'T BE IGNORED**

Prolific output that leads to domination. The biggest hubs of a particular industry, promoting and dominating across borders, languages.



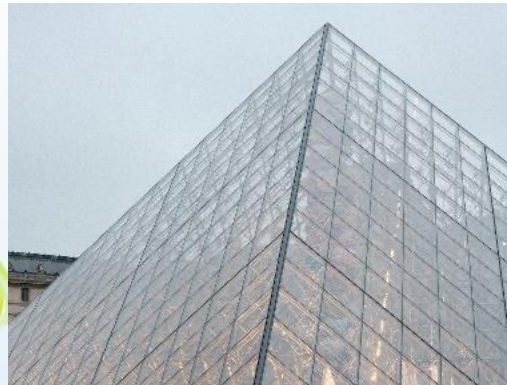
THEY **BUILD THE STAGE**

Whether virtual or physical, they create and play host to the stages that the biggest artists and performers seek out to find their success.



THEIR **CULTURE IS UNMISTAKEABLE**

Homegrown style, genre and aesthetics that is owned by and born of a distinct culture and place.



THEY **CREATE CULTURAL SHRINES & INSTITUTIONS**

Their homegrown arts and cultures are celebrated in institutions and shrines that highlight and showcase them to the world, and maintain and reinforce their importance.



THEY **CREATE CULTURAL IDOLS**

Culture and industries that produce celebrities and idols to personify and embody the culture that created them.



INFLUENTIAL IN ARTS & ENTERTAINMENT

SCALE THAT CAN'T BE IGNORED

Scale of sector and volume of output is a crucial indicator of being influential in arts & entertainment.

A homegrown industry with unique, well promoted and globally appealing output.

Scale implies:

- The biggest and best, **the 'home' of the sector** (think Hollywood, Bollywood), the most cutting edge, biggest budgets and platforms.
- **Creativity and IP that the world wants** to experience, even across language barriers.
- Unlikely to have influence without **domestic success** – scale needs to be reached at home before being exported to the world.
- Suggests **thriving grassroots scenes**; imaginative, creative societies.
- **Implies government support** for growing and amplifying the sectors.

Scale is critical to a nation's perception of being influential. To most, influence is inextricably linked to presence, as a reflection of scale.

Without it, small scale or individual success will always struggle to pay back to the nation.



INFLUENTIAL IN ARTS & ENTERTAINMENT

THEY BUILD THE STAGE

Influence means creating and hosting the stages on which the best practitioners perform – the productions, the sports leagues, the awards and competition, attracting the world’s best.

Building the stage means setting the rules:

- Playing host means **dictating the criteria for success and gatekeeping who can play.**
- Being host **means all eyes are on the nation** when the industry / sector is at its peak, reflecting on the richness or primacy of the nation, and **amplifying its success.**
- Typically flows on from scale. **Performers need to seek out the brightest lights** to be recognised as having reached the top of their game.
- Platforms can be industries, sports leagues or even platforms for creative enablement, e.g., *YouTube, TikTok.*

Individual success is often unconnected to where an individual is from, unless their home nation has created the sector, industry or sport.

INFLUENTIAL IN ARTS & ENTERTAINMENT

THEIR CULTURE IS UNMISTAKEABLE

Bringing aesthetics, style, genres, categories and worldviews that are uniquely informed by the culture that created them drives influence by creating demand for new and different experiences.

Unique, culturally informed arts and entertainment:

- Reflects a **culture with shared values, mindset and worldviews** that create culturally contrasting stories, expressions and experiences.
- It influences via these **stark differences which make them aspirational** and stimulating for many.
- Often appropriated by more dominant markets (e.g., US remakes of British, European, Scandinavian and Asian TV dramas, reality TV, film).

Having a clearly identifiable style is important in creating content that resonates with overseas audiences.

At best, it reflects what is unique about the nation and people and circumstances that created them, thus bringing new news and excitement to audiences craving new stories.





INFLUENTIAL IN ARTS & ENTERTAINMENT

THEY INVEST IN CREATING CULTURAL SHRINES & INSTITUTIONS

Core evidence of influence in arts (primarily) and entertainment is in the preservation and celebration of the long artistic and cultural history via museums, attractions and festivals.

Shrines and institutions indicate:

- A **long and proud history** of contribution to the arts.
- A **culture that has influenced and informed the *long-term direction* of the respective arts / sectors.**
- Shows a country's sophistication, education and maturity – arts and the humanities seen as the luxury of **countries with stability, wealth and thriving populace.**

Institutions such as world-renowned museums, galleries and showcases such as festivals are seen as important national monuments or cultural experiences. They show a nation (and government) that values its cultural heritage and understand the unique value these places can offer to visitors.



INFLUENTIAL IN ARTS & ENTERTAINMENT

THEY CREATE CULTURAL IDOLS

Key cultural influencers embody success and excellence via people performing and promoting their field at the top of their game and being rewarded.

Celebrity culture can cross borders and cultures and endure long after performing careers have ended.

Implies:

- **Scale** of the relevant sector; **people, fanbase, money** - the biggest stars arise from the biggest markets, audiences and genres/fields.
- A **culture that monetises and promotes** their sector aggressively, and an industry always actively looking to create the next big thing.
- This **excellence is frequently exported** via tours of people, exhibitions.
- Popularity that indicates a **strong domestic fan base increases intrigue** and appeal to overseas audiences.

Often indicative of the market's other artists performers want to crack for the biggest rewards, and most prolific in markets that understand the power of individuals as vessels for exporting a national culture and capability.

INFLUENCE CAN STEM FROM DIFFERENT COMBINATIONS OF THESE INDICATORS

Some nations strength hinges on historic achievements and influence, and the preservation and celebration of this culture:

THEIR CULTURE IS
UNMISTAKEABLE

THEY CREATE CULTURAL
SHRINES & INSTITUTIONS

E.g., Italy or France as centres of artistic thinking and invention, that remains central to their identity, preserved and promoted globally.

Some nations strength is founded on modern arts and entertainment, developing, growing and exporting modern sectors that drive mass consumer consumption:

THEY BUILD
THE STAGE

THEY CREATE
CULTURAL IDOLS

E.g., USA as a creator of film, TV, music, and sport, as well as the creator of platforms that gatekeep access.

Scale of production and promotion often an AMPLIFIER of any combination of indicators.

THEIR SCALE CAN'T
BE IGNORED

UNDERSTANDING SOFT POWER METRICS

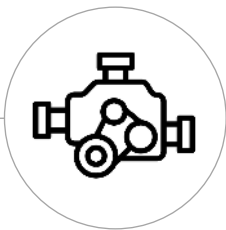
3. BRANDS & PRODUCTS THE WORLD LOVES

HOW IS LEADERSHIP SEEN IN PRODUCTS & BRANDS THE WORLD LOVES

Informed primarily by national sector ‘ownership’

Countries typically seen as producing loved products & brands:

- USA
- Japan
- South Korea
- China
- Germany
- France
- Italy



SECTOR-COUNTRY RELATIONSHIPS

Established, longstanding expertise that nations have built and **refined over generations** or established outright.



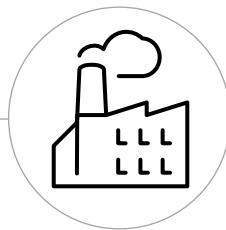
BRANDS ESTABLISHED IN DAILY LIFE

Scale, widespread adoption and success – brands that have become **sector dominant indicates love** – *from Apple to Ikea, Nike to Temu.*



CULTURAL CONTRAST

Bringing wildly different thinking, styles, expertise or ideas born of **cultural contrast** with other nations.



PROLIFICACY

Nations driven to get things done, produce more, new, bigger, with a drive to be decisive and promote at scale.

USA	UK	Australia	China	Singapore	India	Japan
Consumers think of...: USA, China, Sweden, Taiwan, Germany, India, Australia, Italy, France, Japan, South Korea, Mexico, Canada	Consumers think of...: USA, Germany, Italy, France, South Korea, China	Consumers think of...: USA, Germany, Italy, Scandinavia, Japan, France, China, Australia, New Zealand (food/wine)	Consumers think of...: USA, France, Germany, UK, Italy, South Korea, Japan, Canada, New Zealand, Australia	Consumers think of...: USA, Japan, China, South Korea, France, Australia	Consumers think of...: USA, Germany, Italy, France, Japan, Switzerland, Sweden, South Korea, UK	Consumers think of...: France, USA, China. Japan, Italy , UK, Australia, New Zealand and Canada for natural resources

PEOPLE TEND TO THINK BRANDS MORE THAN PRODUCTS

BRANDS

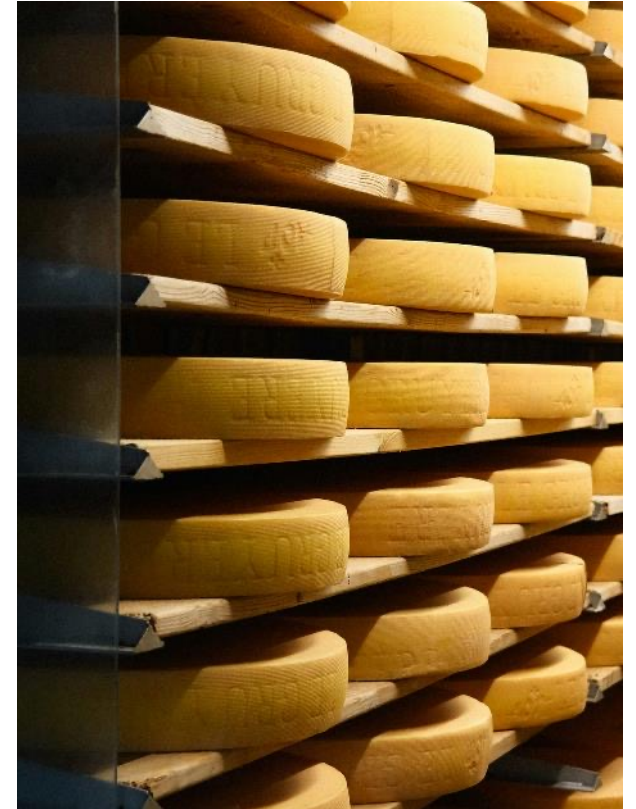


Primarily, consumers think of brands, not products when responding to the soft power metric '*Products and brands the world loves*'.

Brands are actively vying for mental availability with consumers and are so are often a result of a place, a country and environment that has led to their creation.

Beyond national cuisines or foods with geographic provenance, food and other 'un-branded' product categories are less readily associated with a country or place, conferring less equity on a nation than brands.

However, in China, where distrust in domestic commodity categories is high, consumers more readily associated the equity of nation sourced goods such as New Zealand food and beverage.



PRODUCTS

NATION'S STRENGTH IN PRODUCTS & BRANDS BUILT BY LONG HISTORIES OF CATEGORY EXPERTISE

TRADING ON STEREOTYPES AND CULTURE

Product sectors can often be closely tied to a country; it's history or the skills refined there. Many nations leverage these perceptions and become the benchmark or shorthand for category excellence and trust.

Often **these perceptions are established over a very long period** and are seen as a result and reinforcement of the traits of their people. e.g.,

- French / Italian fashion
- Swiss watches
- Belgian chocolates
- German cars / engineering
- Korean skincare

NEW SECTORS LACK HISTORICAL LEADERS

However, new or emergent sectors lack national 'ownership'.

Countries can establish this with concerted investment and sector development at a national level.

This is seen as evidence of **countries who recognise the sectors that will inform our futures and make long term strategic decisions** to quickly establish dominance, e.g.,

- *Chinese EVs*
- *American consumer / digital technology*



NATION-LEVEL ASSOCIATIONS CAN INFLUENCE SENTIMENT TOWARD COUNTRIES AND THEIR PERCEIVED MOTIVATIONS



In some cases, sector and product leadership is presumed to be born of positive traits and motivations. Purchasing from these places imparts a small part of their equity:

- **Japan's innovation** in consumer tech is a result of an innovative, collective culture that prioritises smart thinking to improve people's lives and experiences.
- **Scandinavian design** is thought to result from a collectivist society that cares for and protects its people, thus allowing creative, practical thinking to thrive.
- **Italian and French design** is the result of a culture that values artistry and craftsmanship.
- **German engineering** is the result of people who are diligent and precise with high standards.



However, some nations felt to be less equitable and to even overreach:

- **US brand dominance** is seen as being driven by unrestrained commerciality and consumerism, and gain for individuals over the collective, to the point of stifling the creativity and success of other nations. Though still holding appeal, it can highlight negative national traits.
- **China's success**, born of hard work, volume and pace, can be tempered by knowledge of IP infringement, and political motivations rather than the pursuit of better human outcomes.

KEY INDICATORS OF NATIONS KNOWN FOR LOVED BRANDS & PRODUCTS



THEY HAVE CULTIVATED EXPERTISE

Nations that have a strong, well known association of history, expertise and specialism in a sector. Nations that are the sector benchmark by which the rest of the world is measured.

THEY ARE SECTOR INNOVATORS

Nations that are seen to have either created entire new sectors (e.g., virtual and service based connected tech) or bring big new ideas and disruptions to existing ones.

THEY PLAY IN SECTORS THAT EXCITE

Nations that are associated with strong brands in sectors consumers care about – that impact how they live, work, play and feel.

THEY PRODUCE AND PROMOTE AT SCALE

Nations that invest in promotion, success and domination of their brands, sectors through volume of brands created and supported, and mass marketing that drives ubiquity.

THEY ARE SECTOR FACILITATORS

Nations that produce for the world and make things happen. They provide access through scale, affordability or unique platforms.



HAS PRODUCTS & BRANDS THE WORLD LOVES

CULTIVATED EXPERTISE

Longevity in particular sectors builds a reputation for excellence and standard setting that is hard to match.

Having a long and consistent history in certain industries that become core to a nation's economy or identity reinforces both quality of output and defines perceptions of the nation.

Cultivated Expertise implies:

- Nations with clear motivations or rich histories that relevant sectors (thus brands) are built upon.
- In newer sectors, nations with leadership/government that has clear vision for the nation and have invested and fostered support rapidly, for getting out ahead of the world.
- Nations with a culture of taking pride in their work, meaning higher quality, trust.
- Unsurpassed skill and expertise that has been passed down, refined, and improved upon suggesting modern, well developed and industrialised nations.

Cultivated expertise in a key or notable sector/s suggests a nation with clarity, good leadership and reflects a country that places quality at the centre of all it produces.



HAS PRODUCTS & BRANDS THE WORLD LOVES

SECTOR INNOVATORS

Being associated with driving meaningful change at either sector or global level, inventing new products, sectors, services and experiences.

Sector Innovation seen to reflect countries that:

- Are **ambitious, seeking economic advantage**; often highly capitalistic in nature.
- Implies a nation/culture that rewards and encourages entrepreneurialism, competition and bold risk taking.
- May be seen as high risk; countries that provide little support for failure.

OR

- A culture that is driven to **innovate to make things better** - to improve categories, experiences and lives.
- Implies a nation/culture that is collectivist, thoughtful and wants to make the world better in some way.

Brands are a key part of demonstrating a culture's motivations and world views.

Innovating and first mover advantage creating new or disrupting existing sectors can build sector expertise even without historical equity.



HAS PRODUCTS & BRANDS THE WORLD LOVES

SECTORS THAT EXCITE

Resonating with consumers results from brands that consumers can't avoid, or better still get excited about.

It's about having brands with identity, that consumers can enjoy interacting with, and that impact their lives and identities.

Sectors that excite consumers reflect:

- Nations that are creative, developed, and with a rich and modern culture.
- Push their culture out to the world and make it aspirational.
- May bring a cultural contrast with recipient markets; have different worldviews, aesthetics that are appealing to consumers of other nations.

Consumer perceptions of what makes a strong, loved or meaningful brand are firmly anchored in brands that they aspire to and that bring social cachet.



HAS PRODUCTS & BRANDS THE WORLD LOVES

PRODUCE AND PROMOTE AT SCALE

Successful brands are frequently noted to be those that shout the loudest, and continue to produce and iterate, not resting on their laurels.

It's about brand behaviour as much as product – acting like a big brand is crucial to being seen as one.

Producing and promoting is all about:

- Global demand only follows domestic success, implying these brands are successful at home, category leading and superior.
- Typically expected of countries with large populations, economies and consumerist appetites.
- Scale reflects confidence in the product, the success and impact on a sector, expertise of those creating it.

Brands being seen across borders and across the world, imported by other countries is seen as evidence of brands that are beloved, and reflect positively on the knowledge, capability and expertise of the countries that create them.



HAS PRODUCTS & BRANDS THE WORLD LOVES

SECTOR FACILITATORS

Those countries that facilitate access to more, new and different products and services.

Brands that make things happen and connect consumers to the goods they want to experience or open new avenues of connection and market access.

Facilitation implies:

- Countries that are on the up, taking aggressive steps in building industry, working at scale and feeding the world's demand.
- Industry fueling a new wave of affordable and democratised access to goods, services and experiences.
- Born in countries with clear economic goals backed by government support and investment.
 - Either ambitious rapid development goals and a workforce eager to fill demand, think Temu, Shein, Alibaba or;
 - Social and tech platforms like Tik Tok or Meta, driven by a skilled and educated workforce.

Strongly associated with the countries of their origin, these brands are central to modern life in 2025 and are seen as key service or channel brands.

TWO BROAD COMBINATIONS OF INDICATORS

The easiest mental shortcuts for consumers exist where countries have an established excellence, such that they are shorthand for category leadership.

THEY HAVE CULTIVATED EXPERTISE

Can be difficult for other nations to challenge this long standing equity, in particular where category merits are more intangible (e.g. design, style, taste, craftsmanship) or where wholesale innovation is not readily needed e.g. engineering

THEY PRODUCE AND PROMOTE AT SCALE

The most critical indicator is presence in sectors consumers care about – consumer-facing brands and sectors, that ideally sell an aspirational identity, a piece of culture, participation in the conversation.

THEY PLAY IN SECTORS THAT EXCITE

THEY ARE SECTOR INNOVATORS

THEY ARE SECTOR FACILITATORS

THEY PRODUCE AND PROMOTE AT SCALE

Excitement can come from creation of new sectors, products and services, or opening up new consumer behaviours.

Scale of investment in production, promotion and exporting of these capabilities a key means to but also evidence of, success.

ALL THREE SOFT POWER METRICS ARE IN FACT ENTWINED, AND INFORM ONE ANOTHER

HERITAGE

History, culture, shared experiences and beliefs



Products and brands are a *modern* extension and a new capitalistic platform for countries to promote their culture, skills and capabilities

Heritage informs the nature of arts & entertainment, reflecting history, experience, refinement of culture, aesthetics and what is deemed important to a culture

PRODUCTS & BRANDS



Mass commercialisation of art, entertainment and heritage

ARTS & ENTERTAINMENT

Expressions of culture, heritage, character



Arts & Entertainment is an outward expression of culture and heritage, and a platform for brands to build upon

