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## The Anholt-GfK Roper Nation Brands Index<sup>SM</sup> 2010 Report – New Zealand Abridged

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Prepared for New Zealand and Abridged for Distribution

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## Introduction to 2010 NBI<sup>SM</sup>

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The way a country is perceived can make a critical difference to the success of its business, trade and tourism efforts, as well as its diplomatic and cultural relations with other nations.

Simon Anholt and GfK Roper Public Affairs & Corporate Communications are pleased to bring you the 2010 Anholt-GfK Roper Nation Brands Index<sup>SM</sup> Report. The Anholt-GfK Roper Nation Brands Index<sup>SM</sup> represents a unique collaboration combining the heritage and authority of GfK Roper's three-quarters of a century of experience in public affairs research with the expertise of Simon Anholt to offer a unique barometer of global opinion.

Since 1996, when he coined the term 'nation brand' and gave birth to this important new field, Simon Anholt has been helping governments plan the policies, strategies, investments and innovations which lead their country towards an improved profile and reputation. Anholt developed the Nation Brands Index<sup>®</sup> in 2005 as a way to measure the image and reputation of the world's nations, and to track their profiles as they rise or fall. In 2008, Simon Anholt entered a partnership with GfK Roper Public Affairs & Corporate Communications to offer the Anholt-GfK Roper Nation Brands Index<sup>SM</sup> – an expanded Nation Brands Index<sup>®</sup> providing governments and their agencies with a one-of-a-kind resource for actionable insights needed to more effectively manage a country's reputation.

### The Anholt-GfK Roper Nation Brands Index<sup>SM</sup>

Conducted annually with GfK Roper beginning in spring 2008, the Anholt-GfK Roper Nation Brands Index<sup>SM</sup> measures the image of 50 nations. Each year, approximately 20,000 adults ages 18 and up are interviewed in 20 core panel countries.

The Anholt-GfK Roper Nation Brands Index<sup>SM</sup> measures the power and appeal of each country's 'brand image' by examining six dimensions of national competence. Together, these dimensions make up the Nation Brand Hexagon<sup>®</sup>.

**Exports.** This is what marketers call the "country of origin effect" – whether knowing where the product is made increases or decreases people's likelihood of purchasing it, and whether a country has particular strengths in science and technology, and has creative energy. Perceived associations with particular industries round out that country's image in this space.

**Governance.** This aspect incorporates perceived competency and honesty of government, respect for citizens' rights and fair treatment, as well as global behavior in the areas of international peace and security, environmental protection, and world poverty reduction. Respondents also select one adjective that best describes the government in each country.

**Culture.** Cultural aspects measured are perceptions of a country's heritage, its contemporary cultural "vibes" from music, films, art and literature, as well as the country's excellence in sports. Various cultural activities are presented to respondents to gauge their strongest images of a country's cultural "product."

**People.** The general assessment of a people's friendliness is measured by whether respondents would feel welcome when visiting the country. Additionally, we measure the appeal of the people on a personal level – whether respondents want to have a close friend from that country – as well as human resources on a professional level, that is, how willing respondents would be to hire a well-qualified person from that country. Respondents are also asked to select adjectives out of a list to describe the predominant images they have of the people in each country.

**Tourism.** Respondents rate a country's tourism appeal in three major areas: natural beauty, historic buildings and monuments, and vibrant city life and urban attractions. Tourism potential is also asked: how likely they would be to visit a country if money is no object and the likely experience represented by adjectives such as romantic, stressful, spiritual, etc.

**Immigration and Investment.** Lastly, a country's power to attract talent and capital is measured not only by whether people would consider studying, working and living in that country but also by the country's economic prosperity, equal opportunity, and ultimately the perception that it is a place with a high quality of life. The country's economic and business conditions – whether stagnant, declining, developing or forward-thinking – complete the measurement in this space.

The NBI<sup>SM</sup> score is an average of the scores from the six indices mentioned above. There are between 3 and 5 ratings questions for each of the indices. Ratings are based on a scale from 1 to 7 with 7 being the highest and best, 1 being the lowest and worst, and 4 being the middle position which is neither positive nor negative. Each hexagon point also has a word choice question which helps enrich the understanding of the properties of a nation's image.

## **The 2010 NBI<sup>SM</sup> Survey**

The 2010 NBI<sup>SM</sup> survey has been conducted in 20 major developed and developing countries that play important and diverse roles in international relations, trade and the flow of business, cultural, and tourism activities. Given the increasing global role played by developing countries, the survey strives to represent regional balance as well as the balance between high-income and middle-income countries. The core 20 panel countries are:

Western Europe/North America: The U.S., Canada, the UK, Germany, France, Italy, Sweden

Central and Eastern Europe: Russia, Poland, Turkey

Asia-Pacific: Japan, China, India, South Korea, Australia

Latin America: Argentina, Brazil, Mexico

Middle East/Africa: Egypt, South Africa

In all, 20,261 interviews have been conducted with approximately 1,015 interviews per country for the 2010 NBI<sup>SM</sup> Survey. Adults age 18 or over who are online are interviewed in each country. Using the most up-to-date online population parameters, the achieved sample in each country has been weighted to reflect key demographic characteristics such as age, gender, and education of the 2010 online population in that country. Additionally, in the United States, the United Kingdom, South Africa, India and Brazil, race/ethnicity has been used for sample balancing. The report reflects the views and opinions of online populations in these 20 countries -- citizens who are connected to the world.

The NBI<sup>SM</sup> measures the image of 50 nations. In each panel country the list of 50 nations is randomly assigned to respondents, each of whom (except Egypt) rates 25 nations, resulting in each nation getting approximately 500 ratings per panel country. In Egypt, where respondents are not as familiar and experienced with online surveys, survey length was reduced, resulting in each nation getting approximately 250 ratings.

The list of 50 nations is based on the political and economic importance of the nations in global geopolitics and the flow of trade, businesses, people, and tourism activities. Regional representation and, to some extent, the diversity of political and economic systems are taken into consideration to make the study truly global. NBI<sup>SM</sup> subscription members' interests are also reflected in the selection of the countries.

The list of 50 nations<sup>1</sup> is as follows, listed by region:

North America: The U.S., Canada

Western Europe: The UK, Germany, France, Italy, Spain, Ireland, Scotland, Sweden, Denmark, Holland, Belgium, Switzerland, Finland, Austria, Luxembourg\*, Flanders\*

Central/Eastern Europe: Russia, Poland, Czech Republic, Hungary, Turkey, Romania, Slovakia\*, Estonia\*\*, Lithuania\*\*

Asia Pacific: Japan, South Korea, China, India, Thailand, Indonesia, Malaysia, Singapore, Taiwan, Australia, New Zealand

Latin America: Argentina, Brazil, Mexico, Chile, Peru, Cuba, Colombia, Ecuador\*\*

Middle East/Africa: United Arab Emirates, Iran, Egypt, Saudi Arabia, South Africa, Angola, Kenya

Due to the expanded coverage – regarding nations measured, and in the number of questions asked – and the more stringent sample distribution control compared to NBI<sup>SM</sup> studies prior to 2008 – no trend comparisons are made to pre-2008 data. Conscious efforts were made to keep the 2010 NBI<sup>SM</sup> methodology comparable to the 2009 NBI<sup>SM</sup>, including core questionnaire content, sample design, sampling techniques, and fieldwork procedures, and data processing to facilitate comparisons between the two years. Qualitative assessment of whether and how the image of a country has improved in relationship to other countries that have been in waves before 2008 can be discussed on a case-by-case basis.

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<sup>1</sup> Chinese respondents are asked of all nations except their own.

\* Nations new to the NBI<sup>SM</sup> 2010

\*\* Nations included in 2009 but not included in 2010

## **About GfK Roper Public Affairs & Corporate Communications and GfK Custom Research North America**

GfK Roper Public Affairs & Corporate Communications is a division of GfK Custom Research North America. The group specializes in customized public affairs and public opinion polling, media and corporate communications research, and corporate reputation measurement in the U.S. and globally. In addition to delivering a broad range of customized research studies, GfK Roper Public Affairs & Corporate Communications draws from GfK's syndicated consumer tracking services, GfK Roper Reports® US and GfK Roper Reports® Worldwide, which monitor consumer values, beliefs, attitudes and behaviors in the U.S. and more than 25 other countries. The division also serves as the official polling partner of the Associated Press conducting the AP-GfK Poll ([www.ap-gfcpoll.com](http://www.ap-gfcpoll.com)).

Headquartered in New York, GfK Custom Research North America is part of the GfK Group. With home offices in Nuremberg, Germany, the GfK Group is the No. 4 market research organization worldwide. It delivers a comprehensive range of information and consultancy services in the three business sectors of Custom Research, Retail and Technology and Media. The Group has 144 affiliated companies covering over 100 countries. Of its more than 10,000 employees, over 82 % are based outside Germany (as of June 30, 2010).

## **About Simon Anholt**

Simon Anholt is recognized as the world's leading authority on national image and identity. He is a member of the UK Government's Public Diplomacy Board, and works as an independent advisor to around 20 other national, regional and city governments on identity strategy and public diplomacy. Anholt developed the concept of the Nation Brands Index® in 2005. He is founding editor of the quarterly journal, *Place Branding and Public Diplomacy*, and the author of *Brand New Justice*, *Brand America* and *Competitive Identity - the New Brand Management for Nations, Cities and Regions*. His latest book, *Places*, was published by Macmillan in 2010, together with a completely new edition of *Brand America*. Anholt was awarded the 2009 Nobels Colloquia Prize for Economics.

## Highlights and Implications

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- New Zealand is well-positioned on the overall NBI<sup>SM</sup>, ranking 14<sup>th</sup> out of 50 nations. Among panel countries, New Zealand's ranking ranges from 5<sup>th</sup> (Australia) to 31<sup>st</sup> (Egypt)
- New Zealand's favorability rating is higher than the average rating in each country, except for Egypt; and its rating is higher than Asia-Pacific's regional score on favorability in all survey countries except for India and Egypt
- Familiarity with New Zealand varies by region, with Commonwealth countries the most knowledgeable and Eastern Europe and Latin America generally the least knowledgeable
- New Zealand rates in the top half of all six hexagon dimensions. It ranks highest in Governance (11<sup>th</sup>), People and Immigration/Investment (both 13<sup>th</sup>)
- On Governance, its strongest dimension, New Zealand ranks in the top 10 among eight of 20 panel countries. New Zealand is seen by respondents as "reliable," "trustworthy," and "reassuring"
- 13<sup>th</sup> overall on the People Index, New Zealand places in the top half of the NBI<sup>SM</sup> among panel countries, except for Turkey and Egypt, and places in the top 15 on all Index questions, especially for having welcoming people
- Also 13<sup>th</sup> overall on the NBI<sup>SM</sup> Immigration/Investment Index, New Zealand places in the top 10 in nine of the 20 panel countries
- New Zealand places 17<sup>th</sup> on the Tourism Index, receiving higher marks from Commonwealth countries and the Asia-Pacific. However, six panel countries rank New Zealand outside of the top 20
- On Exports, New Zealand ranks 20<sup>th</sup> overall, buoyed by several of its major trading partners, such as Australia, the U.S., the UK, and China, but dragged down by Russia and Egypt where the ranking is 28<sup>th</sup> and 31<sup>st</sup>, respectively
- New Zealand ranks lowest on Culture (24<sup>th</sup>). None of the panel countries rank New Zealand in the top 10



## 1. Overall Rankings

### Overview of Nation Brands Index®

The overall reputation landscape of major nations has remained relatively stable over the last twelve months, against economic challenges experienced in many parts of the world. Some interesting shifts have also been recorded, as events ranging from financial bailouts, natural disasters, and civil unrests, to major sports events, leave varying impacts across the continents.

**Table 1.1: Overall Nation Brands Index®**

2010 rank order	2009 rank order	Nation	2010 NBI <sup>SM</sup> score
14	15	<b>New Zealand</b>	59.97

NBI<sup>SM</sup> scores range from 1-100

### New Zealand's NBI<sup>SM</sup> Rankings

New Zealand has a strong showing on the overall NBI<sup>SM</sup> placing 14<sup>th</sup>. The 20 panel countries give New Zealand a wide range of rankings from 5<sup>th</sup> in Australia to 31<sup>st</sup> in Egypt. All of the panel countries, except Egypt, place New Zealand in the top half of the overall NBI<sup>SM</sup>. Not surprisingly, other Commonwealth nations tend to be the most positive about New Zealand's overall reputation, with Australia, the UK, Canada, South Africa, and India contributing to its highest rankings. In addition to Egypt, Central and Eastern European countries Turkey, Poland and Russia rank New Zealand low.

**Table 1.2: New Zealand's NBI<sup>SM</sup> Rankings by 20 Panel Countries**

<b>Panel countries</b>	<b>New Zealand's rank</b>	<b>Panel Countries</b>	<b>New Zealand's rank</b>
Australia	5	Japan	16
United Kingdom	6	Argentina	17
Canada	11	Germany	17
South Africa	11	Italy	18
India	12	France	19
South Korea	12	Mexico	20
United States	13	Russia	23
China	14	Poland	24
Sweden	14	Turkey	24
Brazil	16	Egypt	31

NBI<sup>SM</sup> rankings range from 1-50



## 2. Exports

### Exports Index

#### About the Exports Dimension of the Nation Brands Index<sup>SM</sup>:

The first point of the hexagon we look at is the Exports dimension. It is made up of three questions which address the following concepts:

- The country's contribution to innovation in science and technology
- The effect of a product or service's "country of origin" on people's attitudes towards purchasing it
- The degree to which the country is a creative place with cutting-edge ideas and new ways of thinking

Each of these addresses a key component of a country's economic strength and potential. Leadership in innovation is an important aspect of a country's economic power. This concept gets at a nation's investment in research and development and its past and present contribution to the world's progress in science and technology. The second item focuses on the change in value that is associated with a product or service coming from a particular country. Countries that do well in this dimension export well-known high quality brands. The "cutting edge" concept, measures a country's potential for future economic success. Countries that score well on this question are perceived to be dynamic and forward thinking places where creativity is encouraged.

**Table 2.1: Exports Index**

2010 rank	2009 rank	Nation	2010 NBI <sup>SM</sup> score
20	20	New Zealand	54.51

Exports scores range from 1-100

## New Zealand's Exports Rankings

Exports is New Zealand's second lowest ranking dimension, placing 20<sup>th</sup> out of the 50 measured nations. Many of its major trading partners including Australia, the U.S., the UK, and China are New Zealand's top supporters in this area. However, it is interesting that Japan, the world's third largest economy and one of New Zealand's top export partners, gives New Zealand one of its lower rankings on this Index (23<sup>rd</sup>). Japan places a diverse list of countries ahead of New Zealand, including Scotland, Russia, and Taiwan.

**Table 2.2: Exports – New Zealand's Rankings by 20 Panel Countries**

Panel countries	New Zealand's rank	Panel Countries	New Zealand's rank
Australia	10	Italy	19
United States	10	France	20
Canada	13	Brazil	21
United Kingdom	13	Mexico	21
South Korea	15	Argentina	22
India	16	Turkey	22
South Africa	16	Japan	23
Sweden	16	Poland	23
China	18	Russia	28
Germany	19	Egypt	31

Exports rankings range from 1-50

## Exports: Question Rankings and Word Associations

New Zealand, known for its food products, wool, wood, and machinery, places 17<sup>th</sup> for "feel good about buying products from there." Its reputation as a "creative place with cutting-edge ideas and new ways of thinking" is not far behind at 19<sup>th</sup>. New Zealand's lowest ranking on the Exports Index is for its "contribution to science and technology" on which it ranks 23<sup>rd</sup>.

**Table 2.3: Exports Question Rankings**

Concept	New Zealand
Contributes to science and technology	23
Feel good about buying products from country	17
Creative place with cutting-edge ideas and new ways of thinking	19

Table 2.4 shows the products and services that are associated with New Zealand's industries and exports. Given that agriculture is New Zealand's main export it is not surprising that over a third of respondents associate the country with "agriculture." Similarly, with its vast amounts of agricultural exports, its next highest association is for "food" (18%).

**Table 2.4: Exports Word Associations**

<b>Products and services associated with these countries</b>	<b>New Zealand %</b>
High technology	9
Banking	6
Automotive	4
Advertising	9
Crafts	12
Agriculture	35
Fashion	5
Food	18
Oil	3
Film and television	8



### 3. Governance

#### Governance Index

##### About the Governance Dimension of the Nation Brands Index<sup>SM</sup>:

The second point of the hexagon we analyze is the Governance dimension. It is made up of five questions which address the following concepts:

- The country is competently and honestly governed
- The country respects the rights of its citizens and treats them with fairness
- The country behaves responsibly in the areas of international peace and security
- The country behaves responsibly to protect the environment
- The country behaves responsibly to help reduce world poverty

The first two concepts focus on a nation's domestic governance. That a country is seen as being competently and honestly governed is obviously hugely indicative of that government's reputation. The second concept assesses whether or not a government is providing its citizens with the basic rights of a free society. The last three items of the Governance dimension are directed towards a country's behavior in three areas of global policy: international peace and security, the environment, and the problem of world poverty. The final two concepts, behaving responsibly to protect the environment and to help reduce poverty, are both items that have become more and more important components of national reputation in the last few decades. We can expect these governmental responsibilities, particularly the need to have sound environmental policy, to continue to increase in importance in the future.

**Table 3.1: Governance Index**

2010 rank order	2009 rank order	Nation	2010 NBI <sup>SM</sup> score
11	11	<b>New Zealand</b>	60.53

Governance scores range from 1-100

## New Zealand's Governance Rankings

New Zealand's 11<sup>th</sup> place ranking on the Governance dimension is its highest among the six hexagon dimensions. New Zealand ranks in the top 10 among eight of the 20 panel countries, including a first place ranking from the UK which places New Zealand ahead of its own country by eight positions. Egypt is the only panel country to rank New Zealand outside the top 20, but still it ranks it in the top half of the 50 nations at 23<sup>rd</sup>. France, which typically contributes to New Zealand's middling rankings, ranks the country on the lower end for Governance (17<sup>th</sup>), due to lower rankings on "behaving responsibly to help reduce world poverty" (20<sup>th</sup>) and "in the areas of international peace and security" (19<sup>th</sup>).

**Table 3.2: Governance – New Zealand's Rankings by 20 Panel Countries**

Panel countries	New Zealand's rank	Panel countries	New Zealand's rank
United Kingdom	1	Sweden	11
Australia	2	Japan	12
South Africa	4	Mexico	14
Canada	5	Brazil	15
United States	5	Italy	15
China	7	Turkey	15
South Korea	8	France	17
India	10	Poland	20
Argentina	11	Russia	20
Germany	11	Egypt	23

Governance rankings range from 1-50

## Governance: Question Rankings and Word Associations

New Zealand ranks in the top 14 on all five questions that make up the Governance Index. It fares the best on "behaves responsibly to protect the environment" ranking 7<sup>th</sup> among the 50 measured nations. An important contributor to the United Nations' peacekeeping efforts, New Zealand also ranks among the top 10 for "behaves responsibly in the areas of international peace and security."

**Table 3.3: Governance Question Rankings**

<b>Concept</b>	<b>New Zealand</b>
Competently and honestly governed	12
Respects the rights of citizens and treats them with fairness	12
Behaves responsibly in the areas of international peace and security	10
Behaves responsibly to protect the environment	7
Behaves responsibly to help reduce world poverty	14

Table 3.4 shows that New Zealand is seen as “reliable,” “trustworthy,” and “reassuring.”

**Table 3.4: Governance Word Associations**

<b>Adjectives that most accurately describe the government</b>	<b>New Zealand %</b>
Reliable	21
Unpredictable	7
Transparent	9
Trustworthy	22
Dangerous	*
Corrupt	*
Reassuring	11
Unstable	*

\*2% or less



## 4. Culture

### Culture Index

#### About the Culture Dimension of the Nation Brands Index<sup>SM</sup>:

The culture point of the hexagon is made up of three questions covering the following concepts:

- The country excels at sports
- The country has a rich cultural heritage
- The country is an interesting and exciting place for contemporary culture such as music, films, art and literature

The first question in this dimension focuses entirely on one of the widely recognized expressions of modern culture – sports. Countries that have had success in the Olympic Games and in international soccer competitions tend to have the highest ratings for sports. The second concept, having rich cultural heritage, focuses on the depth and richness of a country's cultural history. This dimension is strongly associated with the antiquity of the nation, where countries with older civilizations fare better. The final concept, contemporary culture, refers both to modern mass media culture and to "high culture".

**Table 4.1: Culture Index**

2010 rank order	2009 rank order	Nation	2010 NBI <sup>SM</sup> score
24	25	<b>New Zealand</b>	55.12

Culture scores range from 1-100

## New Zealand's Culture Rankings

Culture is New Zealand's weakest dimension, ranking 24<sup>th</sup>. None of the 20 panel countries place it in the top 10 on the Culture Index. New Zealand's highest ranking comes from Australia, which places it at 11<sup>th</sup>. Its lowest ranking is from Russia at 36<sup>th</sup>. South Korea, which generally ranks New Zealand higher than most, places it 28<sup>th</sup> on Culture due to a lower than average ranking on the "excels at sport" question. Again it is the Commonwealth nations that are most positive toward New Zealand, all placing it in the top 20 on the Culture Index.

**Table 4.2: Culture – New Zealand's Rankings by 20 Panel Countries**

Panel countries	New Zealand's rank	Panel countries	New Zealand's rank
Australia	11	Germany	24
South Africa	12	France	25
India	15	Japan	28
United Kingdom	16	South Korea	28
Canada	19	Turkey	30
United States	19	Brazil	31
Argentina	20	Poland	32
Sweden	21	Mexico	33
Italy	23	Egypt	35
China	24	Russia	36

Culture rankings range from 1-50

## Culture: Question Rankings and Word Associations

New Zealand has a wide range of rankings on the three questions that comprise the Culture dimension. It ranks 18<sup>th</sup> for sports excellence, 24<sup>th</sup> for "interesting and exciting place for contemporary culture," and 30<sup>th</sup> for "rich cultural heritage."

**Table 4.3: Culture Question Rankings**

Concept	New Zealand
This country excels at sport	18
This country has a rich cultural heritage	30
Interesting and exciting place for contemporary culture such as music, films, art, and literature	24

Table 4.4 shows that New Zealand is most highly associated with “sports,” “museums,” and “films.”

**Table 4.4: Culture Word Associations**

<b>Cultural activity or product most expected to be produced in this country</b>	<b>New Zealand %</b>
Opera	7
Pop Videos	10
Circus	7
Sculpture	12
Museums	17
Street Carnival	12
Films	16
Sports	22
Modern design	12
Music	13



## 5. People

### People Index

#### About the People Dimension of the Nation Brands Index<sup>SM</sup>:

The people point of the hexagon is made up of three questions which explore the perceptions of the people of a country from three different perspectives:

- If I visited the country, the people would make me feel welcome
- I would like to have a person from the country as a close friend
- A well-qualified person from the country would be a valuable employee

The first concept – how welcoming the people of a country are – indicates perceptions of a country’s overall friendliness and manners. It expands beyond tourism to serve as an indicator of what the experience of interacting with the people of that country might be like. The second concept goes beyond manners, encompassing characteristics that we want in our close friends – fun, loyal, interesting, and in many cases, sharing our interests. The last concept assesses whether the people of a country would be valuable assets as employees. The responses to this question relate to preconceived notions of the intelligence, competence, and work ethic of a country’s people.

**Table 5.1: People Index**

2010 rank order	2009 rank order	Nation	2010 NBI <sup>SM</sup> score
13	12	<b>New Zealand</b>	63.94

People scores range from 1-100

## New Zealand's People Rankings

New Zealand ranks 13<sup>th</sup> on the People Index, it's second highest among the six dimensions tied with Immigration/Investment. In Australia, Canada, and the UK, New Zealand ranks 3<sup>rd</sup> on this dimension, only behind a combination of these three nations in each of these panel countries. All of the panel countries place New Zealand in the top half of the NBI<sup>SM</sup> on the People Index, with the exception of Turkey and Egypt. With the exception of South Africa and India, the two fellow Commonwealth countries, developing countries from Latin America, to Asia, and through Central and Eastern Europe and the Middle East, give New Zealand low rankings.

**Table 5.2: People – New Zealand's Rankings by 20 Panel Countries**

Panel countries	New Zealand's rank	Panel countries	New Zealand's rank
Australia	3	Japan	11
Canada	3	Argentina	14
United Kingdom	3	Brazil	15
Sweden	7	China	15
South Africa	8	France	19
South Korea	9	Poland	20
Germany	10	Russia	23
United States	10	Mexico	24
India	11	Turkey	26
Italy	11	Egypt	31

People rankings range from 1-50

## People: Question Rankings and Word Associations

Of the three questions that make up the People Index, New Zealand fares the best for having a welcoming people, ranking 6<sup>th</sup> overall. New Zealand ranks in the top 15 on the other two questions, with a 13<sup>th</sup> place ranking for wanting close friends from the country and a 15<sup>th</sup> place ranking for employability.

**Table 5.3: People Question Rankings**

Concept	New Zealand
People would make you feel welcome	6
Like to have a person from this country as a close friend	13
Willing to employ a well-qualified person from this country	15

Table 5.4 shows the percentage of panelists who believe that each adjective describes a country's inhabitants.

**Table 5.4: People Word Associations**

<b>Adjectives that describe the people of each country</b>	<b>New Zealand %</b>
Honest	24
Hard-Working	27
Lazy	3
Ignorant	3
Unreliable	4
Skillful	20
Fun	16
Tolerant	16
Rich	8
Aggressive	*

\*2% or less



## 6. Tourism

### Tourism Index

#### About the Tourism Dimension of the Nation Brands Index<sup>SM</sup>:

The tourism point of the hexagon is made up of four questions which measure several concepts that indicate the strength of a country's brand as a tourist destination:

- Would like to visit the country if money were no object
- The country is rich in natural beauty
- The country is rich in historic buildings and monuments
- The country has a vibrant city life and urban attractions

The first component of the tourism hexagon point measures a country's tourism potential by asking panelists to evaluate their interest in tourist destinations without considering the practical restraints of distance and cost. The following three questions address the three most important qualities that vacationers look for in a destination. The natural beauty of a country can refer to attractive beaches, pristine wilderness, serene farmland, natural wonders, or any variety of landscapes that make a location desirable. The ancient ruins, architectural assets, and historic landmarks that make certain countries prime tourism locales are included in the historic buildings and monuments concept. The third question assesses the contribution of a nation's cities to its tourism image.

**Table 6.1: Tourism Index**

2010 rank order	2009 rank order	Nation	2010 NBI <sup>SM</sup> score
17	16	<b>New Zealand</b>	66.56

Tourism scores range from 1-100

## New Zealand's Tourism Rankings

Renowned for its striking natural beauty, welcoming citizenry, and political and economic stability, New Zealand attracts millions of visitors annually despite its distant location for many around the world. The country currently ranks in 17<sup>th</sup> place for the Tourism Index, the fourth-highest among the six hexagon dimensions.

Looking at the rankings in panel countries, we see that New Zealand receives its highest Tourism rankings from Commonwealth countries as well as Asia-Pacific countries which comprise the bulk of New Zealand's tourism arrivals<sup>2</sup>, though none ranks New Zealand in their top five. The United States, one of New Zealand's most reliable sources of tourists, ranks New Zealand only 17<sup>th</sup> out of 50 nations, on account of low rankings on "rich in historic buildings and monuments" and "vibrant city life and urban attractions." Still, only three panel countries (Russia, Egypt, and Turkey) rank New Zealand outside of 25<sup>th</sup> on the Tourism Index; half rank New Zealand 15<sup>th</sup> or better.

**Table 6.2: Tourism – New Zealand's Rankings by 20 Panel Countries**

Panel countries	New Zealand's rank	Panel countries	New Zealand's rank
United Kingdom	7	Brazil	16
Australia	9	United States	17
Sweden	9	Italy	18
China	10	Argentina	20
Canada	12	Poland	21
India	12	France	23
South Korea	13	Mexico	25
Japan	14	Russia	27
Germany	15	Egypt	28
South Africa	15	Turkey	30

Tourism rankings range from 1-50

<sup>2</sup> Data from Statistics New Zealand's November 2010 report (page 10):  
[http://www.stats.govt.nz/browse\\_for\\_stats/population/Migration/international-visitor-arrivals-nov-10.aspx](http://www.stats.govt.nz/browse_for_stats/population/Migration/international-visitor-arrivals-nov-10.aspx)

## Tourism: Question Rankings and Word Associations

As Table 6.3 demonstrates, New Zealand's appeal as a tourist destination is anchored firmly in the perception that the country is "rich in natural beauty" New Zealand is also viewed as one that people would "like to visit if money was no object." Dragging down New Zealand's overall Tourism ranking is the limited perception that the country is "rich in historic buildings and monuments".

**Table 6.3: Tourism Question Rankings**

Concept	New Zealand
Strongly like to visit if money was no object	10
This country is rich in natural beauty	3
This country is rich in historic buildings and monuments	38
This country has a vibrant city life and urban attractions	21

Table 6.4 shows the adjectives that are most commonly associated with the experience of visiting New Zealand. New Zealand is most often associated with "fascinating," "exciting," and "relaxing" – the combination of which represents top draws for popular vacation spots.

**Table 6.4: Tourism Word Associations**

Adjectives that describe the experience of visiting each country	New Zealand %
Romantic	16
Depressing	*
Exciting	30
Boring	4
Fascinating	34
Risky	4
Educational	19
Stressful	3
Spiritual	8
Relaxing	25

\*2% or less



## 7. Immigration/Investment

### Immigration/Investment Index

#### About the Immigration/Investment Dimension of the Nation Brands Index<sup>SM</sup>:

The immigration/investment point of the hexagon measures the potential of a country as a place to live, work, study, and invest in. This dimension asks about five components of a country's potential for immigration and investment:

- Willingness to live and work for a substantial period in the country
- Quality of life
- Good place to study for educational qualifications
- The country has businesses I'd like to invest in
- Equal opportunity

The component questions of this hexagon point are designed to capture a country's power to attract talent and capital through immigration and investment. With most international migration being primarily motivated by work or educational opportunities, the first and third questions reflect a potential immigrant's interest and willingness to move to a foreign country for a substantial period of time. The quality of life in a nation and its equal opportunities are also central concerns for anyone contemplating living in a new country. The final aspect of this dimension measures the perception of a country's economic prosperity and business opportunity, both powerful draws on human capital and financial investment.

**Table 7.1: Immigration/Investment Index**

13	15	<b>New Zealand</b>	59.15
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Immigration/Investment scores range from 1-100

### New Zealand's Immigration/Investment Rankings

New Zealand ranks 13<sup>th</sup> on the Immigration/Investment Index, tied for second highest of the six hexagon dimensions with the People Index. Nine panel countries rank New Zealand in the top ten, including every Commonwealth country. New Zealand ranks in the top 20 among the panel countries, except for Poland, Egypt, and Russia. China, which in 2008 signed an historic free trade agreement with New Zealand – the first for China with a developed country – places New Zealand in the top ten, which it views as strong across each individual question comprising this Index, particularly on “has a business I’d like to invest in” and “cares about equality in society.”

**Table 7.2: Immigration/Investment – New Zealand's Rankings by 20 Panel Countries**

Panel countries	New Zealand's rank	Panel countries	New Zealand's rank
Australia	5	Japan	14
United Kingdom	5	Argentina	15
Canada	7	Brazil	16
South Korea	7	Mexico	16
Sweden	9	Turkey	18
China	10	Italy	19
India	10	France	20
South Africa	10	Poland	21
United States	10	Egypt	22
Germany	14	Russia	22

Immigration/Investment rankings range from 1-50

### Immigration/Investment: Question Rankings and Word Associations

From Table 7.3 we see that New Zealand has a solid and balanced image across the five Immigration/Investment measures, ranking in the top 15 on four of five measures, and performing best on “cares about equality in society” and “willing to live and work for a substantial period in this country.”

**Table 7.3: Immigration/Investment Question Rankings**

Concept	New Zealand
Willing to live and work for a substantial period in this country	11
High quality of life	14
Good place to study for educational qualifications	17
Has businesses I'd like to invest in	14
Cares about equality in society	11

Table 7.4 shows the adjectives that are most commonly selected to describe New Zealand's current economic and business conditions.

**Table 7.4: Immigration/Investment Word Associations**

<b>Adjective that describes each country's current economic and business conditions</b>	<b>New Zealand %</b>
Backward	*
Developing	15
Forward-Thinking	14
Ambitious	10
Modern	22
Declining	3
Isolated	4
Stagnant	5

\*2% or less



## 8. Descriptive Profiles

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### Descriptive Profiles

This year we introduce Word Clouds to visually summarize and describe a nation's signature strengths associated with its reputation. The three Word Clouds are Products (words from Exports and Culture), Feel (words from People and Tourism), and Momentum (words from Governance and Immigration/Investment). The size of a given word is proportionate to the percentage of the global total sample mentioning that word in relation to the other words in the group, providing an at-a-glance feel of what attributes stand out and what attributes play secondary or background roles in the overall mix of the image.

Looking at the Products Word Cloud, we see “agriculture” emerge as New Zealand’s signature strength, reflecting the country’s ready association with providing some of the world’s best wool, meat, dairy, and fish products. However, agriculture’s prominence has the effect of “crowding out” other associations. New Zealand’s reputation for tenacious competition on and off the field – rooted in the “Rugby, Racing, and Beer” tradition – is clearly evident, though “sports” is in the second tier, followed closely by “food” and “films.” It is worth noting that “high technology” and “banking” are much less prominent in the Products Cloud.

### Products Word Cloud: Exports and Culture Word Associations



\*Note: The Products Word Cloud includes words from the Exports and Culture word association questions. The size of the word is proportional according to its frequency whereas the color scheme and word positioning are randomly assigned for visual clarity.

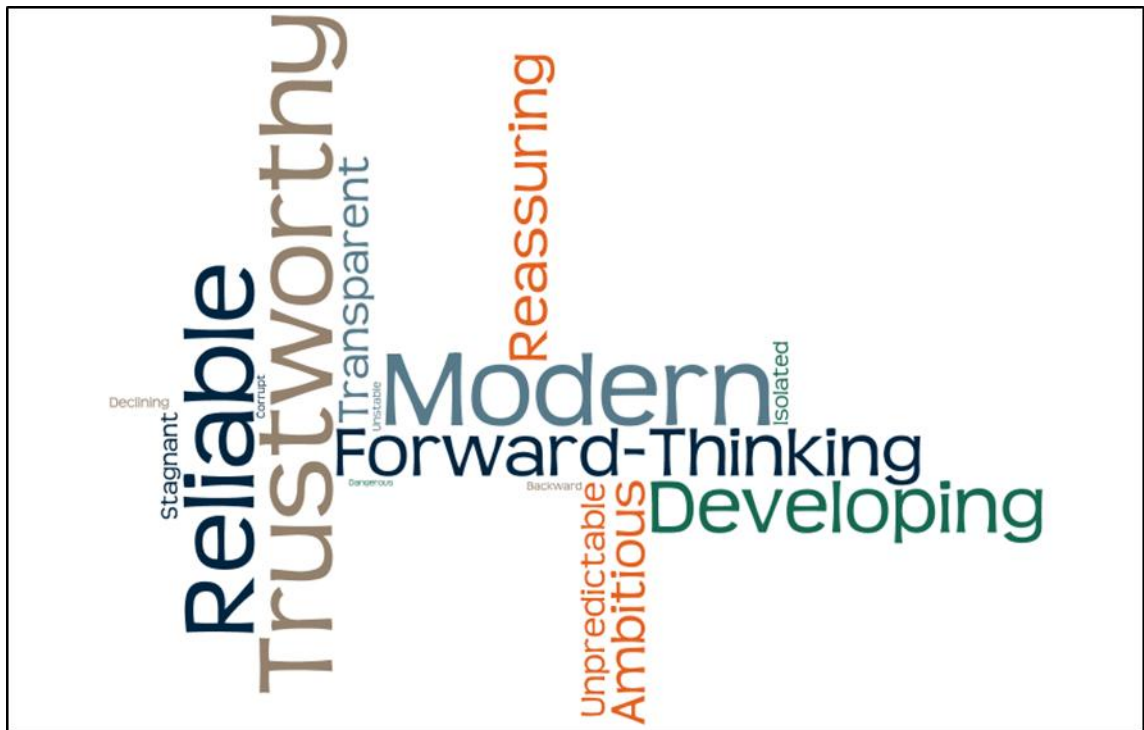
The Feel Word Cloud describes words used to describe New Zealand’s people and tourism experience. Here, impressions are more balanced but distinctly positive. As one of the world’s top tourist destinations, New Zealand is known for satisfying the “highs” and “lows” that many visitors crave, as reflected in “fascinating” and “exciting,” on the one hand, and “relaxing” on the other. This is as much a function of geography as it is of New Zealand’s people – the terms “hard-working” and “honest” compete with other descriptors in prominence on the Feel Cloud. A close second-tier of associations round out New Zealand’s image: “romantic,” “skillful,” “tolerant,” “educational,” and “fun.” Negative associations are virtually imperceptible.

**Feel Word Cloud: People and Tourism Word Associations**



\*Note: The Feel Word Cloud includes words from the People and Tourism word association questions. The size of the word is proportional according to its frequency whereas the color scheme and word positioning are randomly assigned for visual clarity.

The Momentum Word Cloud contains words used to describe the system and performance of a government, as well as society. New Zealand is seen as a “modern” and “forward thinking,” though still “developing” country, with a “trustworthy” and “reliable” government – key ingredients for attracting foreign direct investment. Within the second-tier of traits, the positive descriptors largely outweigh their negative counterparts: “reassuring” and “transparent” are more prominent than “unpredictable” while “ambitious” is more prominent than “stagnant,” “declining,” and “isolated.”



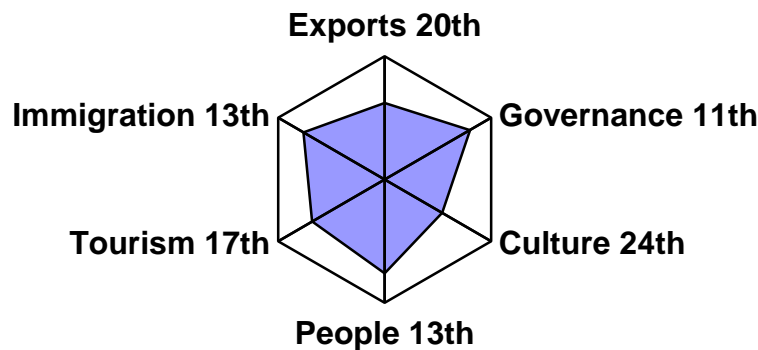
\*Note: The Momentum Word Cloud includes words from the Government and Immigration/Investment word association questions. The size of the word is proportional according to its frequency whereas the color scheme and word positioning are randomly assigned for visual clarity



## 9. Overall Reputational Assessment

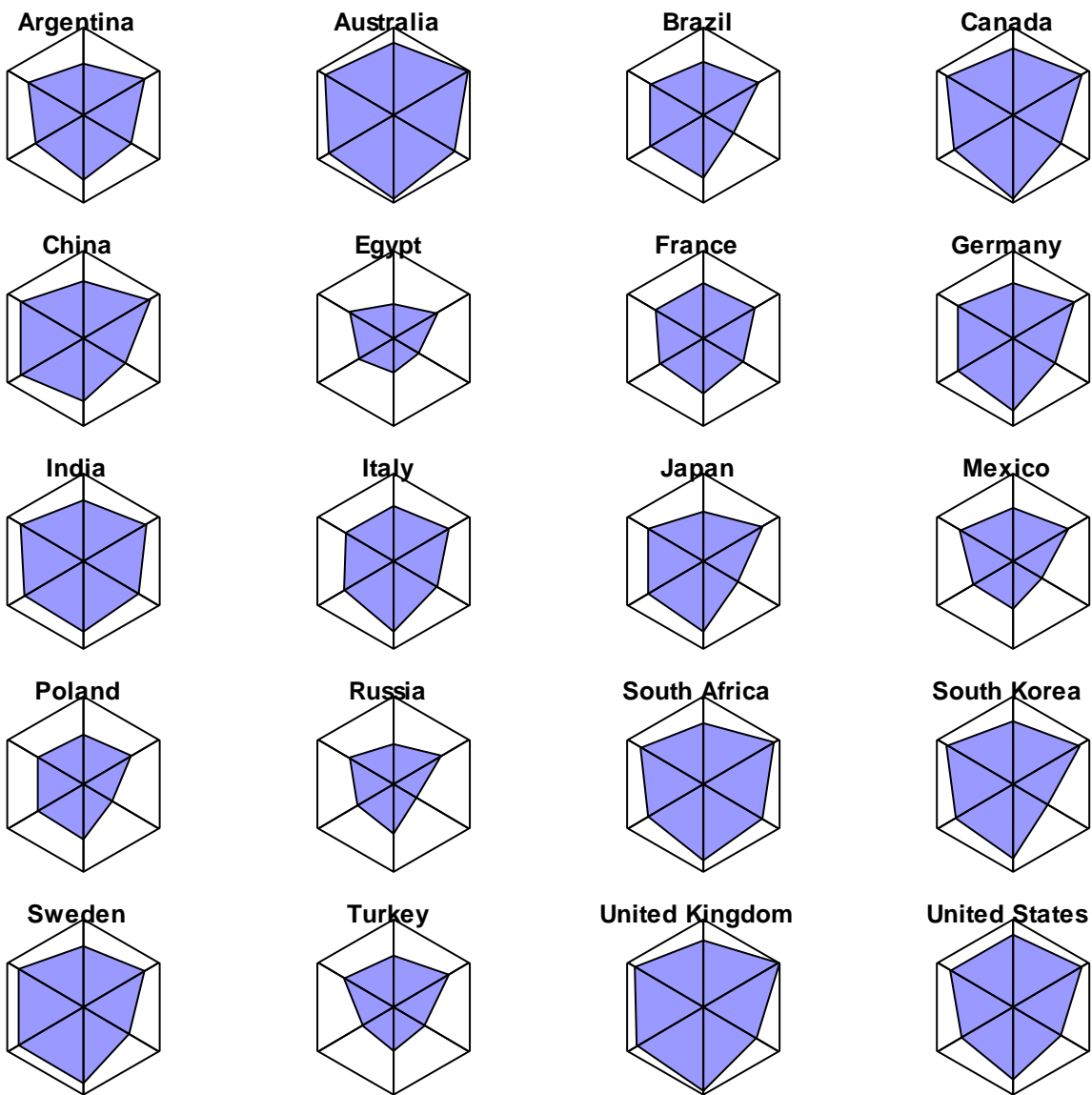
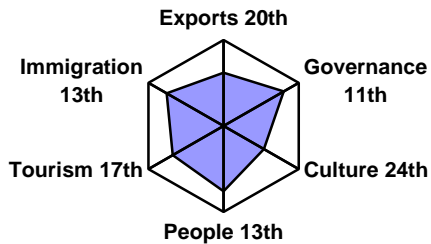
### How the World Sees New Zealand

New Zealand holds encouraging ratings by the connected citizens of the world. It ranks 14<sup>th</sup> among the 50 nations in 2010, putting it into the top one-third of measured nations. The 2010 Nation Brand Hexagon® diagram below shows the elements that comprise New Zealand's positive and fairly well-balanced image, with top 20 rankings on four dimensions, and in the top half among the remaining two. New Zealand is regarded especially well for both natural and people-driven gifts, including a vibrant and stable democracy, welcoming citizenry, and arresting natural beauty. At the same time, New Zealand's overall ranking is depressed somewhat by more middling rankings on Exports and Culture – the country's quality agricultural products, world-class rugby, and extreme sports have yet to lift the performance of other facets of the country's economic and cultural life.



The Nation Brand Hexagon  
© 2000 Simon Anholt

The “mini-hexagons” for each of the survey countries illustrate the level of image consistency across the survey countries. Not surprisingly, New Zealand enjoys a very robust positive image – represented by shaded hexagons – among the Commonwealth countries of Australia, the UK, India, South Africa, and Canada, and it has a solid foothold in Asia-Pacific countries. New Zealand shows consistent strength in Governance and Immigration, reflected by shading in the northeast and northwest areas of the hexagon, respectively, for most countries. New Zealand shows strength in People as well, the south area, though there is noticeable blank space in Egypt, Turkey, Mexico, and Russia. These countries, plus the United States and Argentina, depress New Zealand’s overall ranking in Tourism, the southwest area. On Exports, the north area, New Zealand shows weakness across the board, including with BRIC countries (Brazil, Russia, India, and China) but not, notably, with the United States. Finally, even within the Commonwealth the southeast area tends to have more blank space, reflecting a consistent weakness in Culture. Here, India and South Africa have a greater appreciation for New Zealand’s Culture than other Commonwealth countries.



Having looked at New Zealand's national image in detail across 6 dimensions, we will now discuss several other critical measures that can help provide important context for understanding the interactions between New Zealand and the people of the world: favorability, familiarity and travel and product experience.

## Favorability

Overall favorability is based on the question of overall opinion of each country on a 7-point scale from extremely favorable to extremely unfavorable. This question is asked at the beginning of the survey in order to capture an unvarnished reaction, before the other questions and issues raised throughout the survey can shape respondents' thinking.

Table 9.1 shows the mean favorability score for New Zealand by each of the 20 panel countries. The right-hand column shows the difference between that country's mean favorability of New Zealand and that country's mean favorability of all of the countries.

**Table 9.1: Overall Favorability of New Zealand**

Panel countries	Mean favorability of New Zealand	+/- points from all nation average
Australia	5.57	+1.19
United Kingdom	5.40	+1.01
South Africa	5.33	+0.71
Canada	5.30	+0.89
Italy	5.13	+0.56
Germany	5.10	+0.72
Russia	5.07	+0.18
India	5.04	+0.48
Sweden	5.01	+0.73
United States	5.00	+0.56
South Korea	4.96	+0.55
France	4.88	+0.41
China	4.88	+0.39
Mexico	4.80	+0.17
Argentina	4.79	+0.31
Poland	4.77	+0.33
Japan	4.73	+0.43
Egypt	4.63	-0.12
Brazil	4.61	+0.18
Turkey	4.26	+0.09

The 2010 results show that New Zealand enjoys solid favorability ratings from global citizens – New Zealand’s favorability rating in all but one survey country (Egypt) is higher than the average rating in each country. New Zealand has the greatest margin over the national average among the Commonwealth countries of Australia and the UK (both over one point). Sweden and Germany, which view New Zealand positively across the indices, put New Zealand roughly three-quarters of a point ahead of their nation averages. Asia-Pacific countries, including China, South Korea, Japan, and India, are slightly less enthusiastic in their praise, between +.55 (South Korea) and +.39 (China). There is little separation between New Zealand’s rating and the country average in Russia, Mexico, Brazil, and Turkey – all countries with more muted praise across the indices.

### **Favorability Driver analysis**

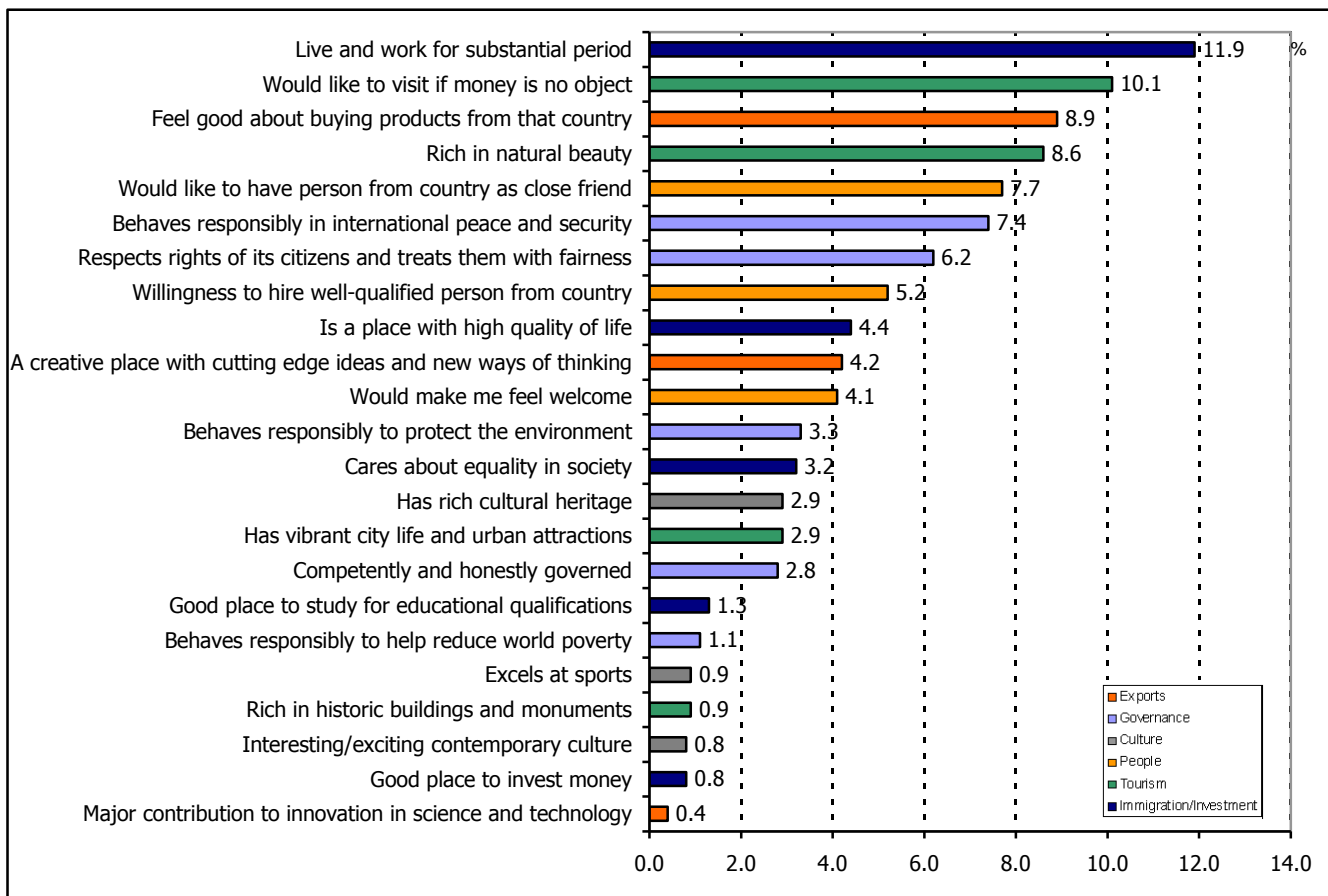
The favorability driver analysis identifies which NBI<sup>SM</sup> attributes have the most impact on the overall favorable impression of New Zealand in the minds of citizens. This analysis has been conducted for the two survey countries which give New Zealand its highest and lowest favorability rankings, in this case, the UK and Egypt, respectively. The independent variables are the 23 attributes that make up the Nation Brands Index; these are colored by dimension in the driver analysis charts below<sup>3</sup>.

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<sup>3</sup> Shapley Analysis is used to measure which attributes are important, i.e. directly contribute to overall favorability. A feature of Shapley Analysis is that it controls for multicollinearity. The “importance” percentages of all attributes add to 100% of the total impact on favorability explained by the 23 attributes. Total variance explained ranges from .36 to .51, a range generally considered robust and significant. Note that this does not mean that the country scores well on these attributes, only that they are important in forming an overall impression of the country.

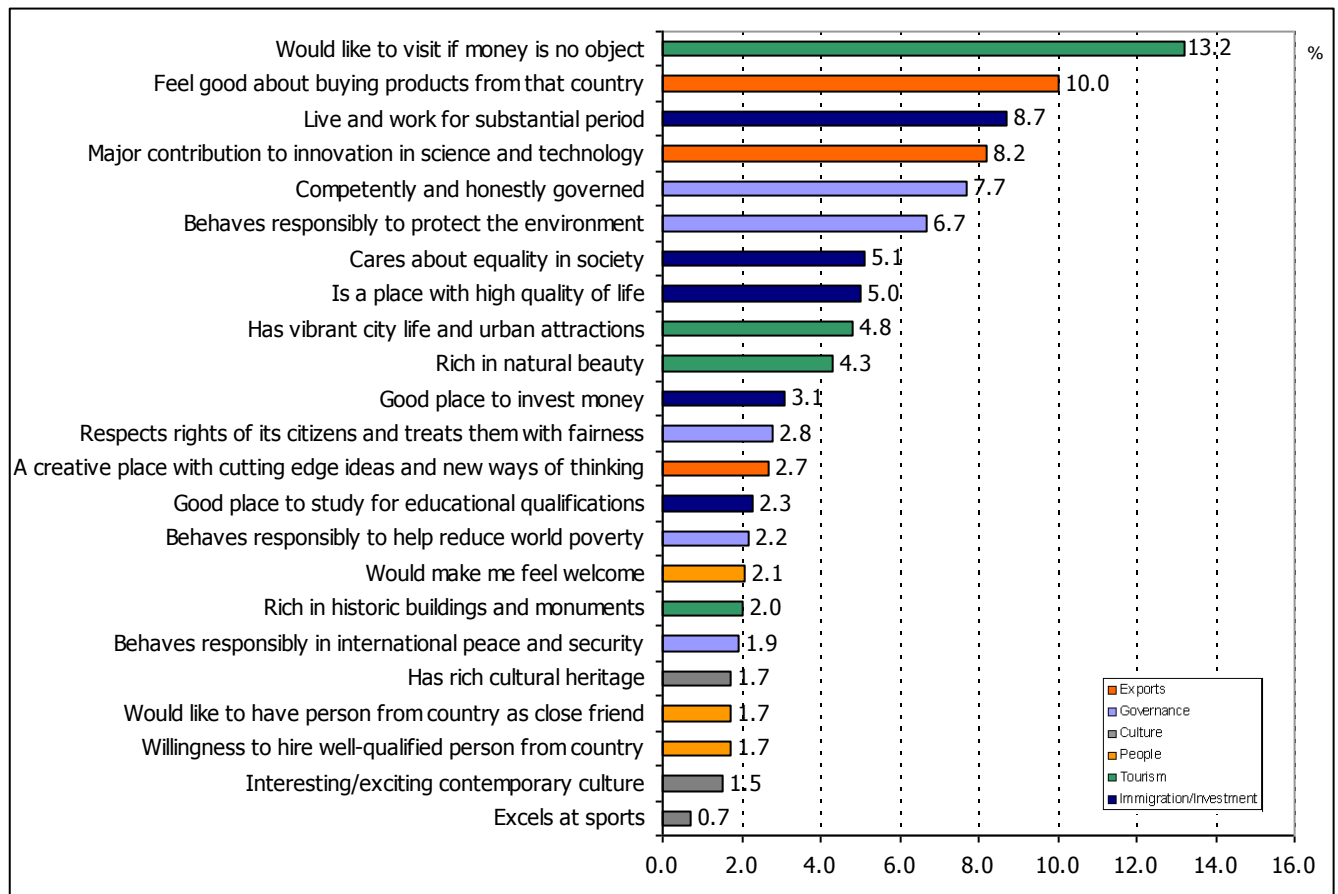
The UK's favorability toward New Zealand is driven primarily by attributes that contribute to the country's attraction as a comfortable place to visit, work, and establish new friendships. Those who think of New Zealand as a place where they would like to "live and work for a substantial period of time," "visit if money were no object," or is "rich in natural beauty" are more inclined to think favorably toward the country. Appreciation for New Zealand's exports also drives favorability. A second-tier of attributes adds incrementally to the impact on favorability including another human relationship attribute – "would like to have a person from the country as a close friend," as well as good governance traits – "behaves responsibly in international peace and security," and "respects the rights of its citizens and treats them with fairness." Notably, the top drivers in these indices are also New Zealand's major strengths – ranking very well – as seen by UK respondents. On the other hand, New Zealand's favorability is not influenced appreciably by sports, cultural heritage, business prospects, or innovation in science and technology.

**Figure 9.2a: New Zealand's Favorability Drivers in the United Kingdom**



There are some favorability drivers shared between respondents in the UK and Egypt. Favorability toward New Zealand is strongly influenced by the perception that the country is one worth visiting if “money is no object” – an attribute that explains more than one-tenth of the variance in favorability in Egypt. Egyptian respondents who “feel good about buying products from that country” and would want to “live and work for a substantial period” are also more likely to think favorably of New Zealand. Respondents from the UK and Egypt part ways, however, when it comes to perceptions that New Zealand provides a “major contribution to innovation in science and technology,” is “competently and honestly governed,” and “behaves responsibly to protect the environment.” These comprise a second-tier of drivers on favorability important to Egyptians.

**Figure 9.2b: New Zealand’s Favorability Drivers in Egypt**



## Familiarity

Table 9.3 displays the percent of panelists from each country who have either familiarity with or some knowledge about New Zealand. The right-hand column shows how that percentage differs from the all nation average within the same panel country. This information can be useful in understanding whether raising familiarity can help improve a country's total NBI<sup>SM</sup> and each of the hexagon points discussed above. For example, receiving a low ranking from a panel country that is very familiar with a nation and receiving a low ranking from a panel country that is not familiar with it could mean very different things. For the low familiarity country, a country might be able to improve its reputation by working to get more exposure in that country – "you've got to be known to be liked." The high familiarity country, however, presents a greater challenge in overcoming already entrenched perceptions.

New Zealand's global visibility is noticeably variable. The high end is anchored by almost saturated familiarity among its neighbor to the northwest, Australia, followed by a fellow Southern Hemisphere Commonwealth country South Africa, where over three-quarters have some knowledge of New Zealand. New Zealand's name also has great reach in the Asia-Pacific (aside from Japan), where familiarity stands clearly above the all-nation average in individual panel countries. Interestingly, however, familiarity with New Zealand is less robust in the UK and Canada, despite solid rankings across indices from these countries – around one-third in each country do not have substantive impressions of New Zealand; and for Canada, familiarity with New Zealand is only three percentage points above the all-nation average among Canadian respondents. Lastly, we see that familiarity with New Zealand is comparatively low in countries where New Zealand also receives lower Index rankings, such as Turkey, Brazil, and France.

While considering the level of familiarity that the citizens of various countries have about New Zealand, it is important to remember that self-reported knowledge may not be well informed, which can be frustrating. Nonetheless, growing familiarity is the fundamental foundation for building a positive reputation – creating opportunities to make sure the world's understanding of a nation is accurate.

**Table 9.3: Familiarity with New Zealand**

<b>Panel countries</b>	<b>% with at least some knowledge of New Zealand</b>	<b>+/- points from all nation average</b>
Australia	90	+27.00
South Africa	76	+11.00
China	76	+4.00
India	74	+10.00
South Korea	73	+10.00
Russia	73	-10.00
United Kingdom	71	+9.00
Sweden	68	-1.00
Canada	64	+3.00
Poland	62	-11.00
Germany	61	-5.00
Argentina	61	-7.00
United States	59	-1.00
Italy	58	-7.00
Egypt	56	-16.00
Mexico	49	-17.00
Japan	47	+2.00
Turkey	47	-15.00
Brazil	40	-8.00
France	34	-11.00

## Experience

Personal visits to New Zealand are driven largely by an interest in pleasure, and, to a lesser extent, business. Australia, the United States, India, and China are most likely to report visiting New Zealand for both business and pleasure. Interestingly, the other Commonwealth panel countries (the UK, Canada, and South Africa) are actually *less* likely to report trips for business or pleasure – this is more likely a function of geographic proximity than a lack of interest (with all three ranking New Zealand in the top 10 destinations to visit if money were no object). Experience with New Zealand’s products is varied, with all Commonwealth countries above the 20-country panel average, and countries that tend to rank New Zealand lower on the core indices, such as France, Italy, and Turkey, well below. Of note, for a country where just 56% report experience with New Zealand, Egyptian respondents’ interaction with New Zealand is tied much more to products and services than first-hand visits to the country; the sizable portion reporting product and service purchase from New Zealand – 37% – is above the 20 panel country average, and ahead of a number of countries including the United States.

**Table 9.4: Experience with New Zealand**

Panel countries	% have visited for vacation/business	% have visited for business	% have purchased products/services from country
Argentina	3	1	18
Australia	33	6	67
Brazil	3	1	13
Canada	6	2	32
China	10	4	28
Egypt	3	0	37
France	3	1	16
Germany	3	1	33
India	16	6	31
Italy	6	2	17
Japan	7	1	24
Mexico	2	1	21
Poland	2	1	27
Russia	2	1	33
South Africa	3	1	30
South Korea	7	1	41
Sweden	4	1	38
Turkey	3	1	11
United Kingdom	7	1	40
United States	16	9	24
20 Panel Country Average	7	2	29