



# NEIGHBOURS, BUT WORLDS APART?

OPTIMISING TRANS-TASMAN COMMUNICATIONS – 2018

Research by Kantar TNS New Zealand. Report design by Colmar Brunton Creative & Multi-media Team.





## The business issue



# Is this a familiar issue?

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Our Trans-Tasman marketing campaigns look cost-effective and fit our budget, but **we don't know...**

1

Why our campaigns perform **differently in New Zealand** than in Australia?

2

Or, **how to adapt them** to improve effectiveness?



# We did some research to shed some light into this issue



**STAKEHOLDER  
INTERVIEWS**



**ONLINE QUALITATIVE  
DISCUSSION BOARDS**

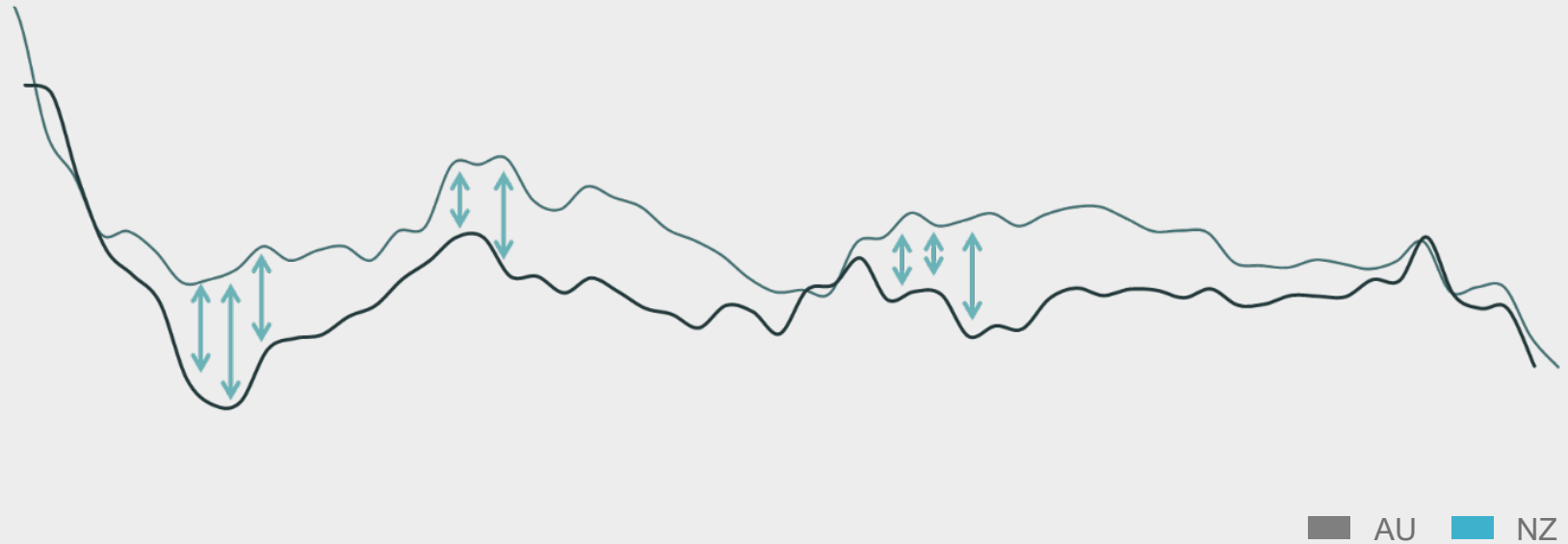


**ONLINE QUANTITATIVE  
SURVEY**



**DESK RESEARCH**

But first, let's start with an example of how **effectiveness** can differ between **Australia and New Zealand**



Examining customer attention **frame by frame** shows us that virtually the same creative achieves **stronger attention results** with the **Australian consumer**

**We have  
several  
hypotheses  
about why  
Australian  
advertising is  
often less  
effective in  
New Zealand**

- 1** Are Australian and New Zealand cultural constructs and values different?
- 2** Does media consumption and digital attitudes and behaviour differ across markets?
- 3** Is the competitive landscape different?
- 4** Does our brand have different equity in each market?



**So why do we lump Australia and  
New Zealand together anyway?**





# GEOGRAPHICALLY WE ARE **CLOSE...**

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...and we do have some  
**shared history** and **culture**  
relative to the rest of the world,  
and a **semi-integrated economy**





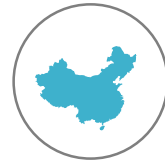
# Hofstede's cultural dimensions theory shows us how New Zealand and Australia are culturally close, relative to say China



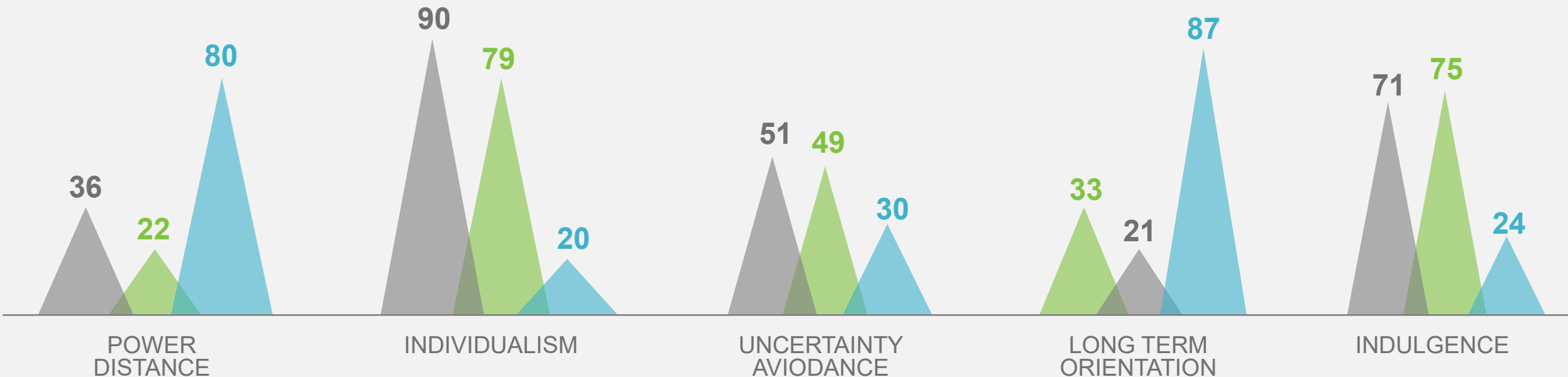
AUSTRALIA



NEW ZEALAND



CHINA



# AUSTRALIANS AND NEW ZEALANDERS PREFER THE SAME NEW ZEALAND BEACH



We both love the outdoors,  
**the beach** and road trips, and  
are drawn to the same imagery



72%

AUSTRALIANS



87%

NEW ZEALANDERS

*preferred the same beach  
image for similar reasons,  
most commonly:*

**Less crowded  
Peaceful / relaxing**



AND THEY PREFER THE SAME NEW ZEALAND ROAD TRIP IMAGE



We both love the outdoors,  
the beach and **road trips**, and  
are drawn to the same imagery



69%

AUSTRALIANS

*preferred the New Zealand  
landscape for similar  
reasons, most commonly:*

80%

NEW ZEALANDERS

**Beautiful scenery**  
Like the windy road, mountains, lake  
Peaceful / relaxing





# And the Aussies and Kiwis we meet on the street can feel more similar than different

---

When we asked Australians and New Zealanders to describe themselves we found the results to be **remarkably similar**



**We both  
see  
ourselves  
as...**

- ✓ **loyal**
- ✓ **caring**
- ✓ **open-minded**
- ✓ **liking to treat everyone equally**
- ✓ **confident**
- ✓ **laid back/ relaxed**

# But of course we **don't agree** on everything...



New Zealanders are more likely to see themselves as 'hard-working' with a 'can-do' attitude

They also perceive themselves to be more intelligent and family focussed than Australians do

Whereas Australians rate themselves more highly when it comes to standing up for themselves

**+9**

**CAN-DO**

**+13**

**HARD-  
WORKING**

**+11**

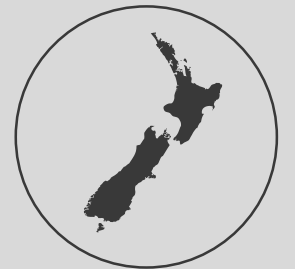
**INTELLIGENT**

**+8**

**FAMILY  
FOCUSSED**

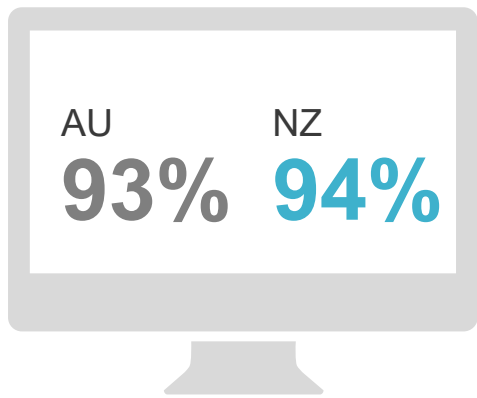
**+7**

**STAND UP  
FOR SELF**

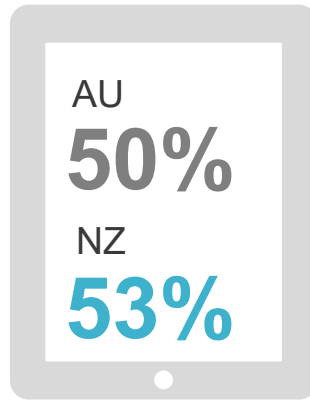


# And our device and media usage isn't that different

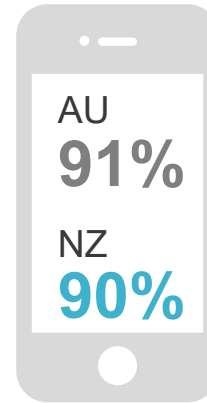
PENETRATION OF DEVICES IS SIMILAR ACROSS BOTH MARKETS...



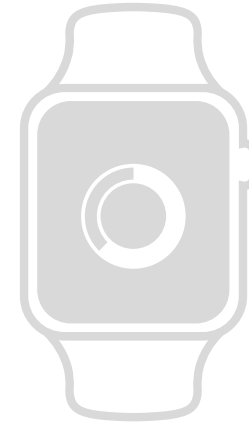
PC/LAPTOP



TABLET

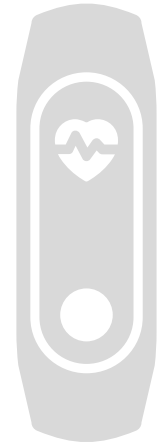


SMARTPHONE



AU 5%  
NZ 4%

SMARTWATCH



AU 14%  
NZ 16%

FITNESS BAND



# And our device and media usage isn't that different

...ONLINE AND OFFLINE MEDIA USAGE IS ALSO SIMILAR

(HOURS PER DAY)



TV



RADIO



NEWSPAPERS/  
MAGAZINES (PRINT)



WATCHING TV/VIDEO  
CONTENT ONLINE



SOCIAL  
NETWORKING



NEWSPAPERS/MAGAZINES/  
ARTICLES (ONLINE)



OFFLINE ACTIVITIES



ONLINE ACTIVITIES

So lumping  
New Zealand and  
Australia together  
can feel like a  
sensible thing to do

---

BUT THIS DOESN'T  
ANSWER OUR QUESTION...



*Why are we seeing such differences in terms of **communication effectiveness** – why do some **Australian campaigns not travel well across the Tasman?***



*Are the **cultural differences** bigger than we think or is it just a case of **different competitive environments** for our brands?*



**It's time we took a closer  
look at the differences**





**When we see this it's hard to believe  
Australians and New Zealanders have  
anything in common!**



**Penal colony**  
— 'convicts!'

**ORIGINS**

**Religious colony**  
— 'do gooders!'





**When we see this it's hard to believe  
Australians and New Zealanders have  
anything in common!**



**Strong continental  
European migration**

**IMMIGRATION**

**Strong UK European &  
Pacific Island migration**



When we see this it's hard to believe  
Australians and New Zealanders have  
anything in common!





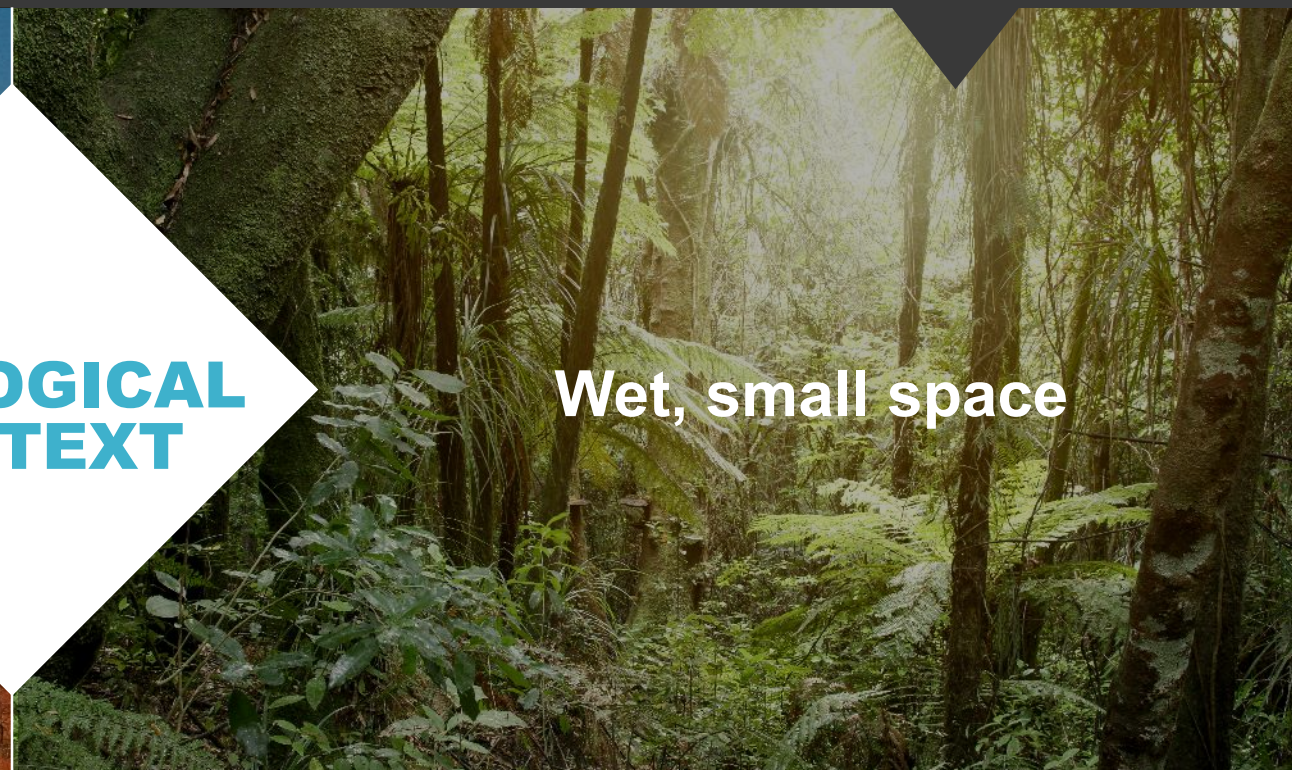


**When we see this it's hard to believe  
Australians and New Zealanders have  
anything in common!**



**Dry, vast space**

**GEOLOGICAL  
CONTEXT**



**Wet, small space**





**When we see this it's hard to believe  
Australians and New Zealanders have  
anything in common!**



**Native marsupials,  
monotremes, lizards,  
bats, snakes and birds**

**WILDLIFE**



**Native birds and bats**



When we see this it's hard to believe  
Australians and New Zealanders have  
anything in common!







**When we see this it's hard to believe  
Australians and New Zealanders have  
anything in common!**



**23.6 million**

**POPULATION  
SIZE**



**4.6 million**





When we see this it's hard to believe  
Australians and New Zealanders have  
anything in common!



**\$1.34 trillion**  
**(12th in the world)**

**GDP**

**\$174 billion**  
**(55th in the world)**

# The fundamental way culture is constructed is different



In New Zealand the wider group goal is **“Making the most of life”**



In Australia the wider goal is **“Making the most of self”**

....we can see this play out in different ways



When we look at the **different cultural narratives** that New Zealanders and Australians aspire to the differences become much more pronounced



Fun loving, cheeky, sarcastic

Confident, brave and good at standing up for themselves

Can-do attitude and being environmentally conscious

Adventurous, hands-on, family focused and loyal



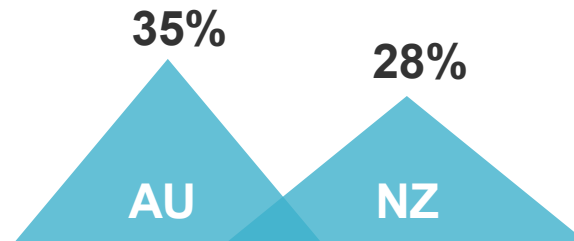
We even  
have different  
**concerns**  
when it comes  
to aging



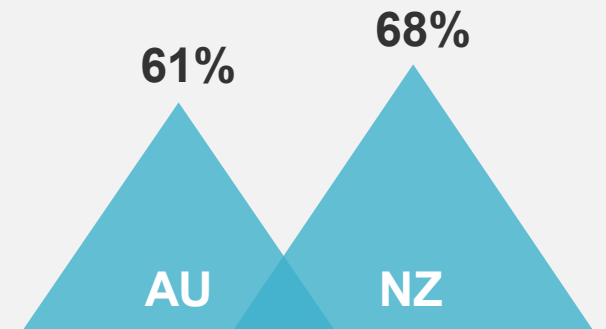
Overall, Australians are more concerned about aging than Kiwis



Specifically, Australians have  
greater concerns about their  
**change in appearance...**



...whilst New Zealanders  
have greater concerns about  
**declining mental capacity**





Importantly the cultural narratives we grow up and aspire to can sometimes feel very different to how we actually see ourselves

These cultural stories are what we see communicated in our advertising and movies. Typically an exaggerated expression of ourselves and our culture

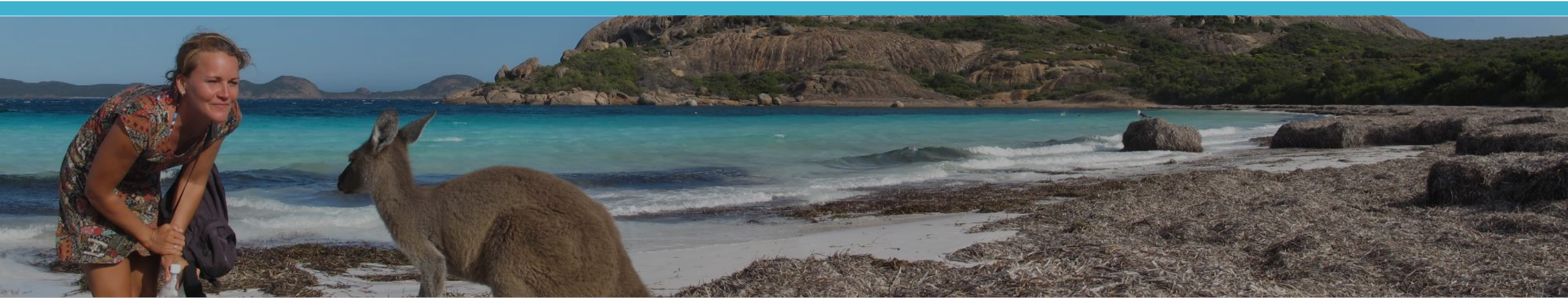
Clearly the likelihood for disconnect is high if we can't identify with what we see being communicated

# We have a problem when how the world sees us isn't how we feel

Australians don't feel as laidback, sociable, adventurous or as fun-loving as the cultural stereotype would suggest

Some aren't feeling as cheeky or as able to make fun of themselves

Nor as tough and brave as they'd like to be!

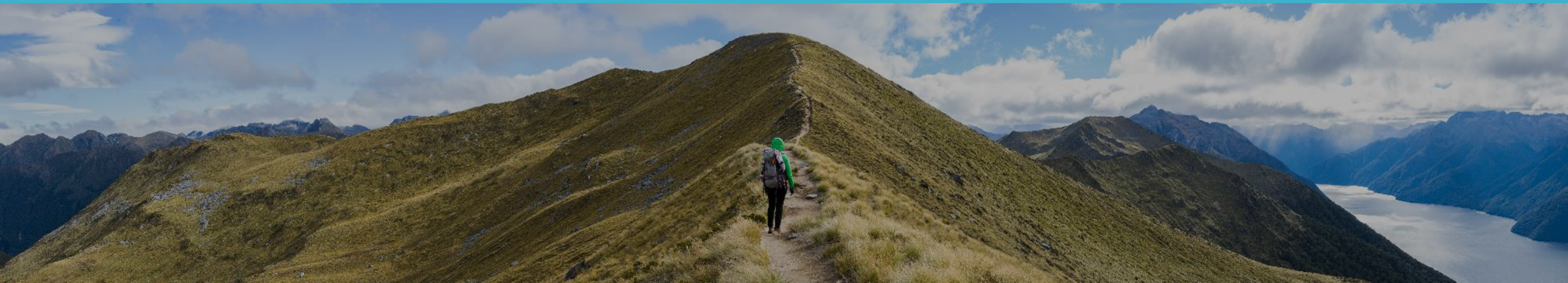


# We have a problem when how the world sees us isn't how we feel

New Zealanders are struggling to live up to their 'can do' attitude and environmental conscious image

We don't feel as adventurous, as laid back or as sociable as our stereotypical image

But we do feel more confident and sarcastic which are more typical Australian traits



# We explored how archetypes manifest in different cultures to help us dig deeper into cultural differences...

## We used the Hero archetype and asked these questions:



Tell me about your heroes/the people who are admired and celebrated and the qualities common to them



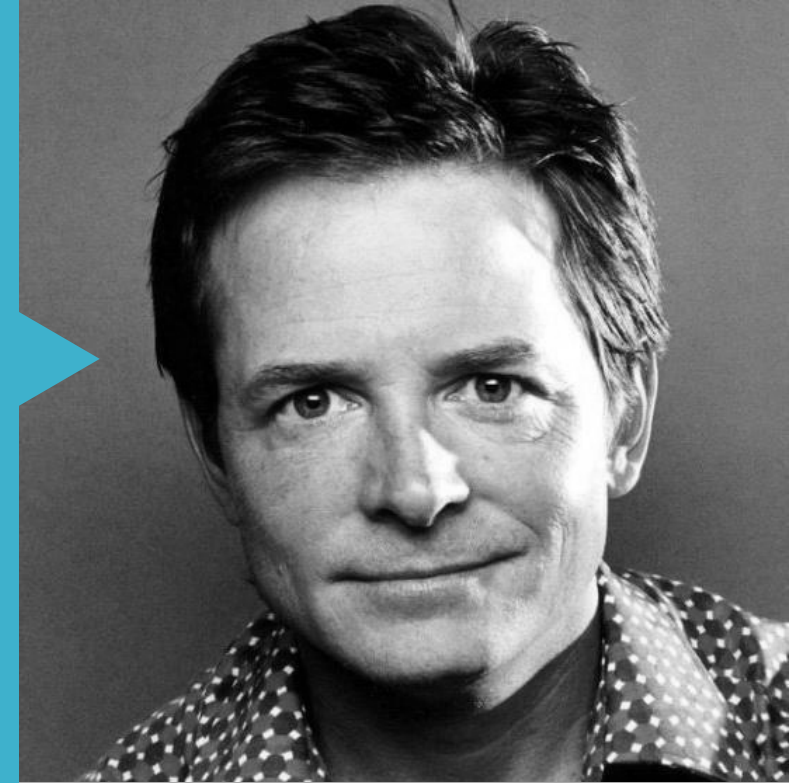
The kinds of achievements that are admired and the causes that are worth fighting for

**The results  
were  
interesting**





Australian heroes were high profile. Resilience, bravery, courage and confidence are admired, specifically the ability to transform in the face of adversity



*“Professional, role model, **brave, confident, funny**, good Aussie bloke - not only for his sporting abilities but also for the way he carried himself amidst drama. The way he was able to **transform himself** into something different post retirement. Very likeable person for me”*



*“He's never given up and he used what most people would consider a death sentence as a whole new direction in his life. He's done all of this with such **dignity and courage**. Through adversity he has shown what it means to **never give up** and always make the best of whatever life throws at you”*



New Zealand heroes are everyday people. Mum and dad who are hard working, loyal and genuinely make a difference to their families or communities



*“Aside from my family I also admire the Wilson sisters. They have become very famous in New Zealand due to their **work saving our wild Kaimanawa Horses**. They are amazing horse woman and have done so much to save the wild horses from going to slaughter”*



*“My dad has always been my hero as a kid teaching me to ask questions if you don’t know, learning to look after the cleanliness at home and **value of working hard**. He has been in the same job since I was born and enjoys it, yet nowadays that **loyalty** is hard to find. Values that are worth admiring are **confidence, hard working and genuine to all**”*

# The **TV celebrities** we use in our creatives can have different profiles and cultural fit



Australians aspire to a more Americanised narrative – the **strong American accent feels more aspirational to Australians**



But for New Zealanders this **Americanised-style creative can lack relevance** – Kiwis are more likely to respond positively to British rather than American cues







**The competitive landscape  
is rarely the same**



# Less competitive intensity in New Zealand relative to Australia, and more price conscious

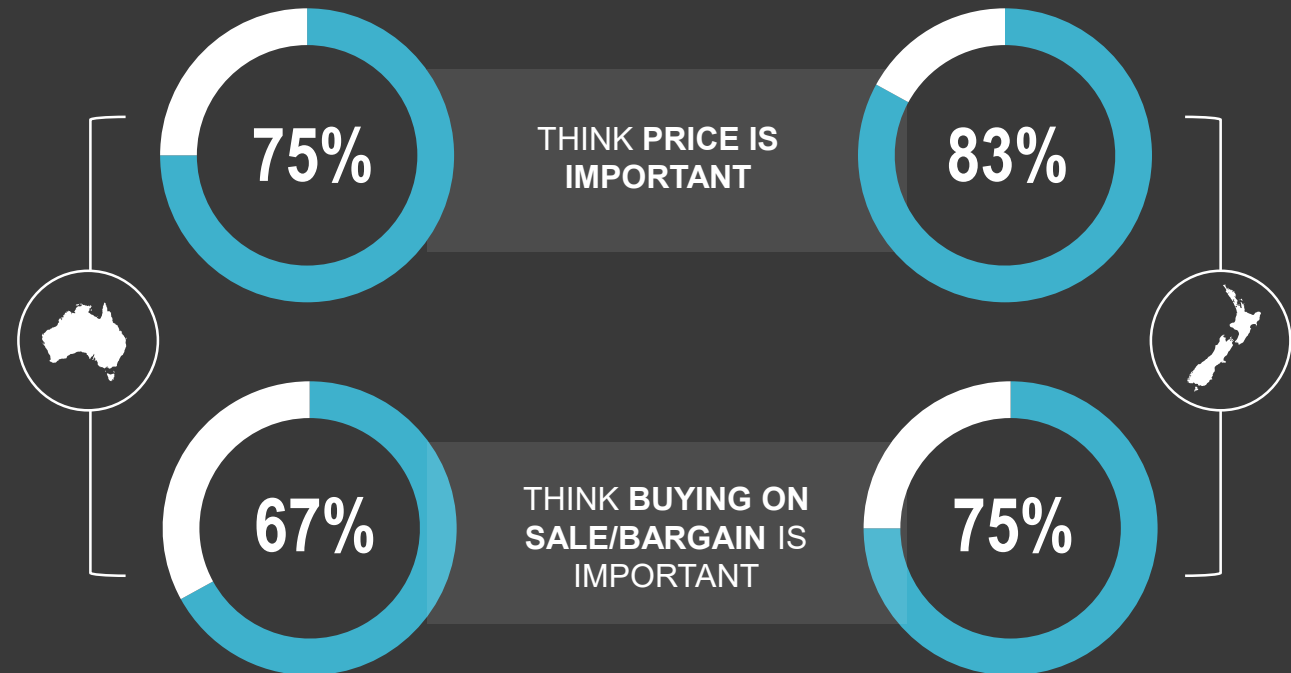
Less people

**AU** 23.6 million **vs** **NZ** 4.6 million

With less to spend  
(gross national income per capita)

**AU** \$60,070 (USD) **vs** **NZ** \$40,020 (USD)

And more focused on price



So what  
does this  
mean?



New Zealand market is typically **more budget conscious** and **less willing to pay a premium** for added value or extra convenience

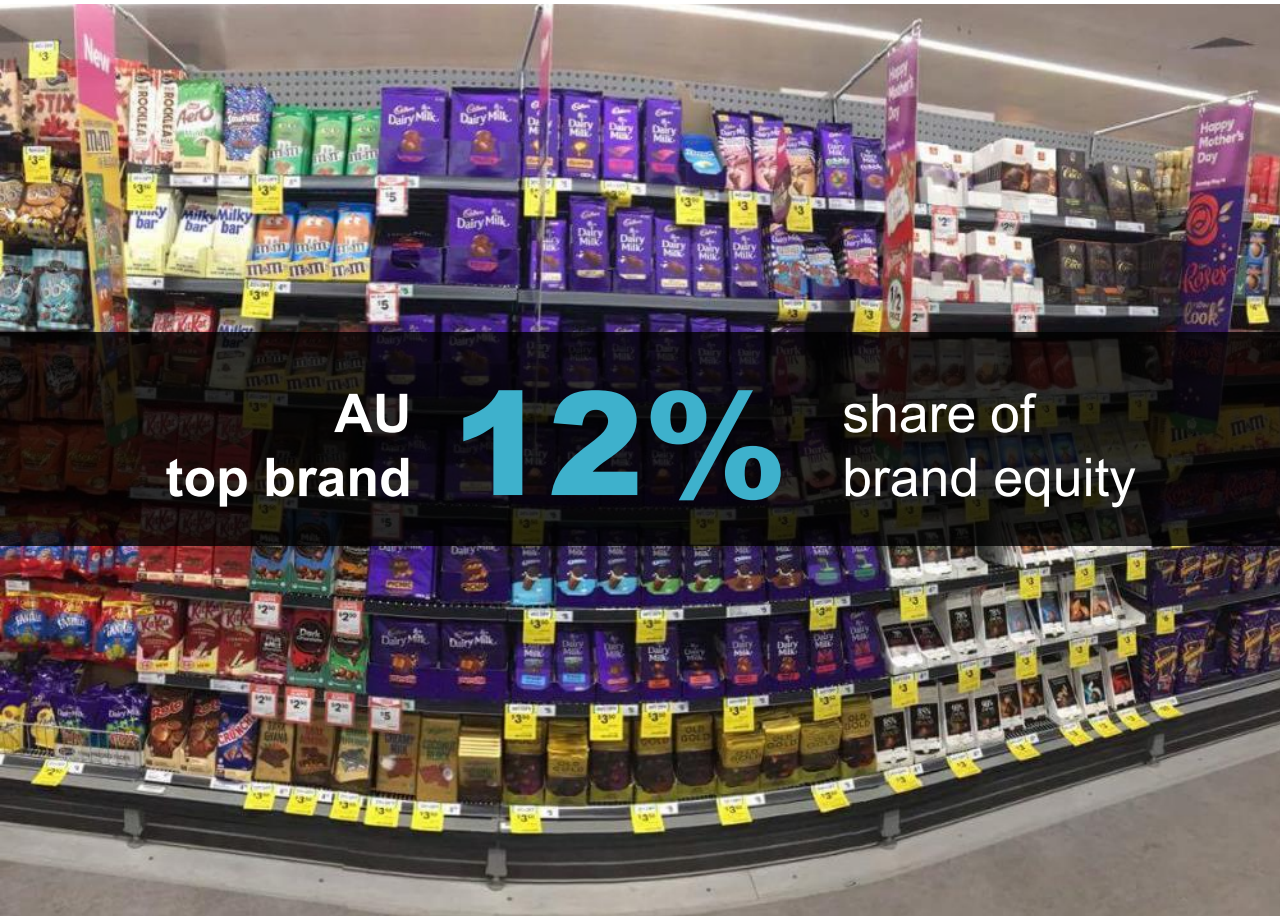
Hence we  
often see less  
brands and less  
SKUs /variants  
available in  
New Zealand



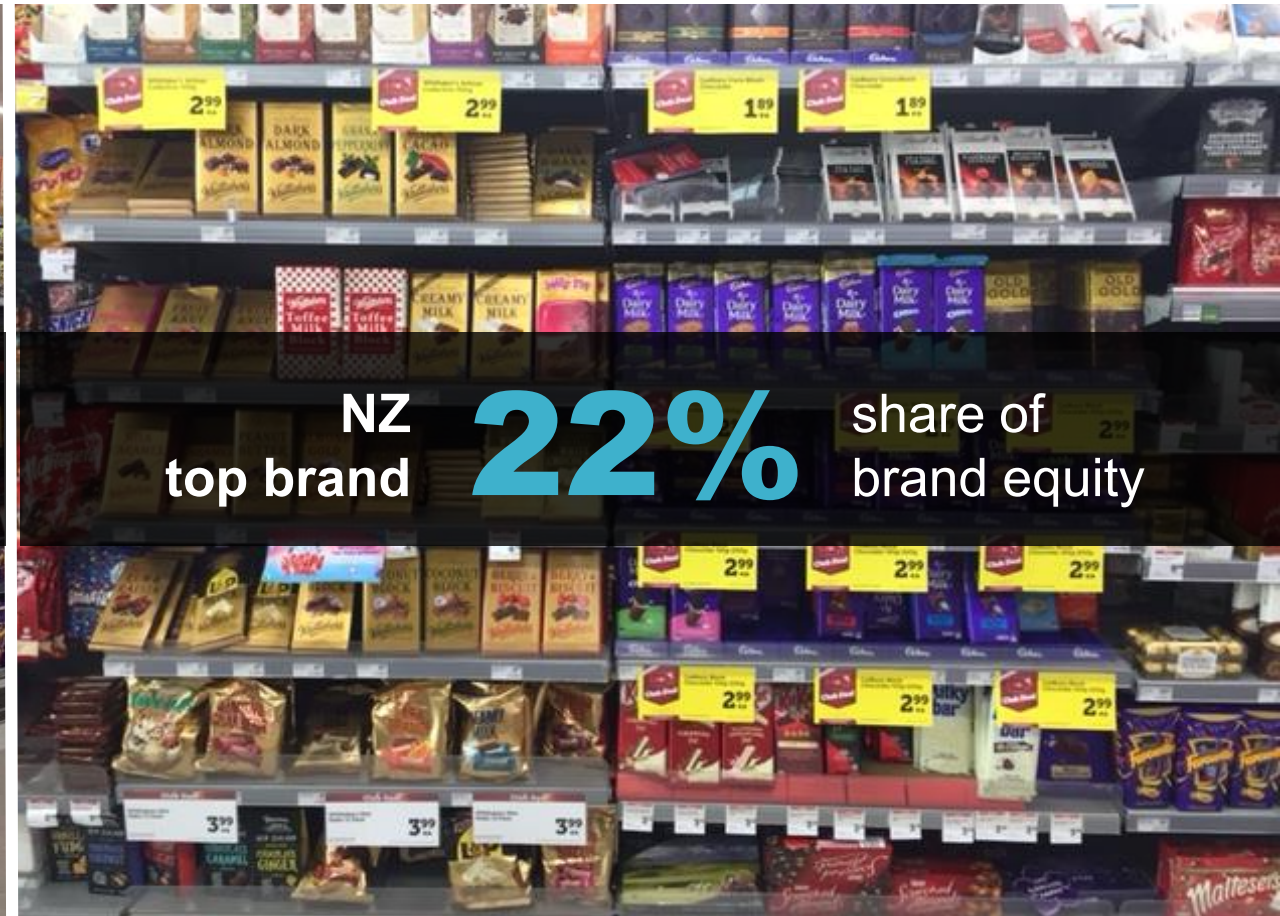




The chocolate category provides us with a good example - we can see the number of SKUs is a lot less in New Zealand...



AU  
top brand **12%** share of  
brand equity



NZ  
top brand **22%** share of  
brand equity

...and there is a very different competitive brand mix

**AUSTRALIA**  
**Cadbury is top brand**



**Cadbury's**

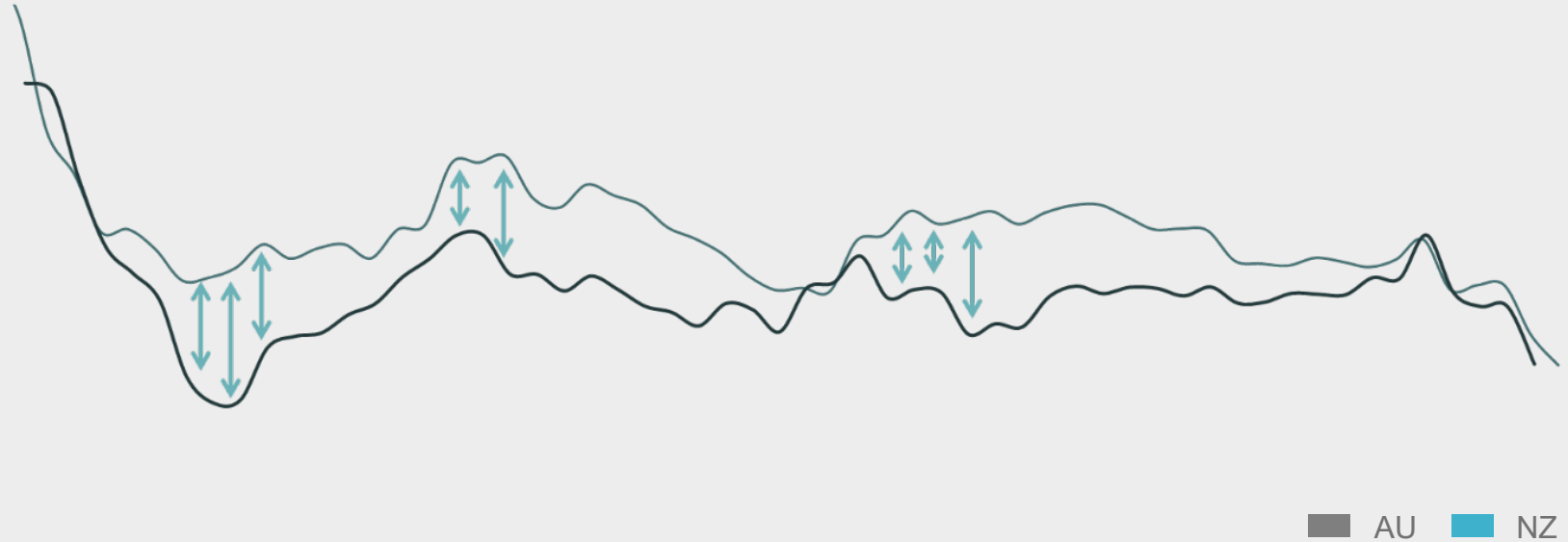
**NEW ZEALAND**  
**presence of local hero**



**Whittaker's**  
SINCE 1896

So why didn't  
this work?

Brand equity  
deficit,  
culturally  
non-specific  
creative



**Stronger creative brand assets** were needed to strengthen the link between the brand and the key occasions  
More overtly **Kiwi moments** would also build relevance and emotive connection





## Insights for agencies and clients



# The quest for efficiency is different from effectiveness

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*“Some of our clients are focused on delivering volume for the lowest cost and this includes the cost of communications.*

*Pursuing an output of efficiency does not necessarily get you more effective communications.*

*In fact, there is a tension between them.*

*We have seen efficiency success for many clients when they invest in a global platform idea with a universal truth behind it, that transcends all markets, for example the Anchor Go Strong platform.*

*Then they switch to effectiveness to adapt and create for the local market.*

*So, efficiency on a global level, then effectiveness locally.*

*Ironically it is often the reverse.”*



**JANES SMITH**  
CHIEF STRATEGY OFFICER

# The efficiency gains of a global brand idea are **not without risks**

Of course there are success stories - global strategy can be very effective if a brand with **strong equity** identifies a **universal truth** or a big human problem **they can solve**



Global ideas can feel **meaningless without local interpretation and execution**

The risk is a global creative that feels so culturally non-specific it's nobody's world





# The challenges are often greater for Australian brands rolling out communications into the New Zealand market

Our Trans-Tasman clients are often still building their brands relative to the big global players and have smaller marketing budgets

It's tempting from a budget perspective to use the same advertising in both Australia and New Zealand

Trans-Tasman marketing is often guilty of making superficial changes too late in the creative process

*“Our cultural differences go beyond a voice over change, or placing a Kiwi by a Pohutakawa versus a Kookaburra under a Gum Tree. **When we merely overlay visual symbols onto an ‘Australian story’ and hope it is representative of New Zealand culture, then it can become a superficial or thin story.** Iconic New Zealand activities (i.e. going to the beach, having barbeques, enjoying a Hokey Pokey ice cream) are just some of the things one can do to express life in New Zealand and importantly are just a small part of what it now means to be a New Zealander”*



**CAROL CLARK**  
HEAD OF DEPARTMENT

# We can improve effectiveness by identifying a unifying insight earlier on in the creative process



Efficiency gains need to be part of strategic brand planning rather than last minute tactical changes to advertising



Need a creative idea for your brand that resonates or creates desired behaviour change in both markets



Not, “It worked well in Australia, let’s just change the voiceover for New Zealand.” Efficiencies at this stage in the process undermines effectiveness



# Consideration needs to be given to the different cultural stories in each country and how these are used in our communications

We are  
**geographically  
close** but our  
countries are  
**very different**  
places to live in



And the  
**cultural  
stories** that  
we grow  
up with  
are not the  
same

Australians are focused on  
**‘making the most of self’** –  
they are **funny, confident**  
and **better at standing up  
for themselves** – and they  
admire **strength and  
bravery**

New Zealanders are focused  
on **‘making the most of life’**  
- they have a **can do** and  
**environmentally conscious**  
image – and they admire  
**loyal, everyday people**

## And care is needed as these cultural stories aren't always aligned with how we see ourselves



We now know that **Australians** don't feel as funny or as brave as their stereotype would suggest



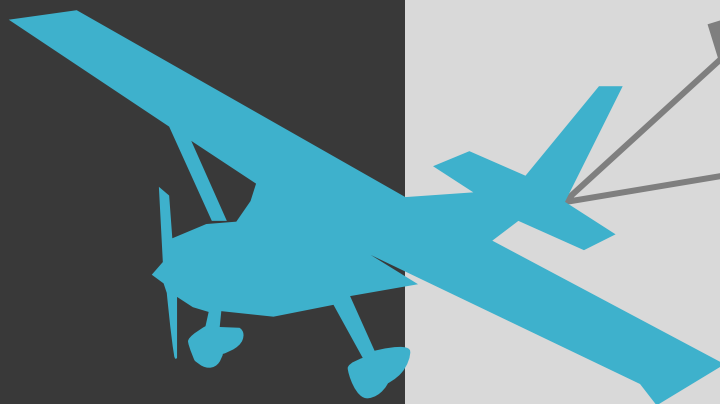
And that **New Zealanders** are struggling to live up to their can do and environmentally conscious ideals

These strongly held cultural narratives are often what we leverage in our communications and if our **target audience feels a disconnect**, we have a potential effectiveness issue



**We need to find the cultural truth to localise**

We also know  
that the  
competitive  
landscape  
in each  
market is  
rarely the  
same



## Brand status

is often a major  
contributor  
to an...

...AD'S ABILITY TO TRAVEL.

Consumer response to  
advertising is governed by their  
**familiarity and engagement**  
with the brand in the first place






# THANK YOU!

Prepared by the Colmar Brunton Creative & Multi-media Team





**TOP**  
five  
**TIPS**

to improve

**TRANS-TASMAN  
COMMUNICATION  
EFFECTIVENESS**

Name	Email	Phone

**TOP**  
five  
**TIPS**

**Challenge cultural assumptions**  
– stereotypes differ from reality

1

**Identify a unifying insight**  
early on in the creative process

2

**Differences in brand equity can impact a campaign's ability to travel**

3

**Understand the competitive set for our brands in each market**

4

**Be specific**  
– culturally ambiguous communications often don't resonate

5