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 Asia New Zealand
Foundation
Te Whitau Tūhono

NEW ZEALANDERS' PERCEPTIONS OF ASIA AND ASIAN PEOPLES



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Comment from the Executive Director

This latest *New Zealanders' Perceptions of Asia and Asian Peoples* report marks 25 years of our perceptions research, which has played a significant role informing New Zealand's engagement with Asia. We are pleased this latest survey finds New Zealanders are more aware of Asia, more interested in what happens there, and consider Asia to be more consequential to New Zealand's future than ever before.

In 2021, 79 percent of New Zealanders believed that developing political, social, and economic ties with Asia was important for New Zealand's future, up from 73 percent in 2020.

This was the highest level ever, and a particularly striking finding when you consider the survey took place at a time when the pandemic had constrained New Zealand's in-person engagement with Asia for nearly two years.

Screens went a small way towards filling gaps left by closed borders. New Zealanders are increasingly interested in entertainment and cultural content produced in Asia. Sixty-two percent of New Zealanders said Asia-related entertainment was important for growing New Zealand's interest in Asia, with the Korean Netflix show *Squid Game* playing a noteworthy role.

However, New Zealanders also recognise the value of more active ways to develop relationships with Asia, including business and trade initiatives, political dialogue, travel and tourism, international education and cultural exchange.

We asked New Zealanders about their interest in overseas travel and were heartened to find the pandemic had not impacted interest in Asia travel for most. Three out of four said they were interested in travelling offshore when it was possible and practical to do so. Asia was a priority destination, second only to Australia and for young people (under 30), it was the highest priority travel destination.

New Zealanders understand that Asia is a complex region and from time to time there will be challenges to navigate. For this latest report, we added new questions to provide greater insights into New Zealanders' views of security and political developments in Asia. The survey found most New Zealanders were aware of the military coup in Myanmar, and supportive of the New Zealand Government formulating a response.



New Zealand's relationship with China has featured prominently in public discourse in recent times, so we asked for views on New Zealand's engagement with the country. Three-quarters of New Zealanders would like to see New Zealand broaden trade beyond the Chinese market, and most (53 percent) support our political leaders engaging regularly with Chinese counterparts. China continues to be seen as a priority for New Zealand's engagement, behind only Australia. China also continues to be the first word that comes to mind for New Zealanders when they are asked to think about Asia.

For the first time, we asked about trust in major powers, and learned New Zealanders see the United Kingdom (58 percent) and Japan (49 percent) as the most responsible major powers. They expressed the least confidence in Russia (the survey occurred before the invasion of Ukraine in February 2022).

To mark the 25th anniversary of the survey, this year's report contains a special focus on the views of young New Zealanders aged 16 to 19 who will soon leave secondary school for tertiary education

and the workforce. Our results tell us young New Zealanders are interested in engaging with Asia on a range of issues, including on climate change, and believe more needs to be done in schools to help equip young people with the skills and knowledge to thrive in Asia. Fifty-eight percent of respondents said they were interested to work or study in Asia, reflecting a growing sense of connectiveness with the region.

This *New Zealanders' Perceptions of Asia and Asian Peoples* report will inform a major project for us this year: *Seriously Asia Revisited*. Held in 2003, the original *Seriously Asia* initiative helped Aotearoa New Zealand chart its engagement with Asia over the following two decades. The 2022 project will gauge just how far New Zealand has come with developing its relationships in the region and what we need to do to progress them further.

I hope you find the report as interesting and useful a read as I have.

Simon J Draper

Asia New Zealand Foundation
Te Whītau Tūhono

“I think it’s super important that New Zealand has strong connections with Asia... It’s a different way of interacting and doing business than with the traditional, English-speaking, countries that we’ve had strong relationships with in the past. That’s moving from our colonial past to what makes sense to the region of the world that we’re in. I think that’s a shift that’s happened in the last 20 years that we’re kind of just getting used to.”

Male, 29, New Zealand European, Auckland

INTRODUCTION



Our approach

The Asia New Zealand Foundation Te Whītau Tūhono has been surveying New Zealanders' perceptions of and connectivity to Asia for more than two decades. The annual survey supports an informed public conversation about New Zealanders' engagement with the countries and peoples of Asia; and it also guides the Foundation's own work: equipping New Zealanders to thrive in Asia.

This report presents the results of a survey of 2,334 New Zealanders aged 15 years and over conducted from 9 to 29 November 2021. The results have been weighted so that they are representative of New Zealanders by age within gender, ethnicity and location. The 2021 sample size was increased from the 2020 sample, allowing the survey to report results by regional location within New Zealand with greater confidence. A description of sample composition and methodology for the 2021 survey is found on page 76.

The *Perceptions of Asia and Asian Peoples* annual survey was first commissioned by the Asia New Zealand Foundation in 1997. To mark the 25th anniversary of the survey, this year's report contains a special focus on the Asia-related perceptions and aspirations of our next generation: young New Zealanders aged 16 to 19 who will soon leave secondary school for tertiary education and the workforce. Part III of the report contains the results of an additional survey of this group undertaken in January 2022.

Changes to the questionnaire

This year's survey includes several additional questions to gain new or deeper understanding of New Zealanders' perceptions of Asia:

- A question exploring New Zealanders' trust in major world powers.
- A question exploring New Zealanders' level of concern on threats to New Zealand.
- Questions on the Myanmar coup, and any desired response from New Zealand on this.
- Questions on New Zealanders' perceptions of New Zealand's regional political, defence, and security context.
- Questions around international travel and Covid-19.
- Questions around New Zealanders' consumption of social media and Asia-related entertainment.
- Questions on the 2020 Tokyo Olympics held in July and August 2021.

These are in addition to minor changes and improvements to the survey questions and response options gleaned from the 2020 results.

Qualitative insights

Quotes and insights taken from four qualitative focus groups that were held shortly after the completion of the *Perceptions of Asia and Asian Peoples* survey fieldwork. The qualitative research provides additional insights on survey subject matter. Quotes from focus group participants are featured across the report to compliment quantitative findings.

In the qualitative discussions, we explored:

- New Zealand's international relations and regional security dynamics.
- New Zealand's relationship with China.
- The impacts of Covid-19 on New Zealand's engagement with Asia.
- How New Zealand can build deeper connections with Asia.
- How New Zealanders connect with Asia in everyday life.

More details of the qualitative research are included in the methodology section of the report (see page 76).

Context for the survey

Responses are inevitably influenced by events happening at the time the survey is conducted. The following topics, issues and media reports occurred around the time of the survey fieldwork and may have contributed to New Zealanders' perceptions:

- The broader backdrop is that the fieldwork took place almost two years since the Covid-19 pandemic first emerged in Wuhan, China, in December 2019.
- New Zealand hosted the virtual APEC summit in 2021.
- The 2020 Summer Olympics held in Japan in July and August 2021.
- Minister of Foreign Affairs Hon Nanaia Mahuta visited Indonesia as part of her first offshore travel since the Covid-19 outbreak.
- Minister for Trade and Export Growth Hon Damien O'Connor travelled overseas to progress trade negotiations.
- Preparations were underway for the Winter Olympics held in Beijing in 2022.
- Riots were taking place in the Solomon Islands.
- Myanmar continued to be governed by military coup leaders, with some civil unrest.
- Covid-19 lockdown in Auckland, Waikato, and Northland.
- Media coverage of New Zealand's border settings, including coverage of the Managed Isolation and Quarantine (MIQ) system.

Qualitative focus groups took place in January and February 2022, after the quantitative fieldwork in November 2021. In early 2022, the following events might have influenced interview responses:

- The Omicron variant of Covid-19 arrived in New Zealand in January 2022.
- The Beijing Winter Olympics took place from 4 to 20 February 2022.
- Ukraine was invaded by the Russian Federation in February 2022.
- New Zealand parliamentary grounds were taken over by anti-vaccination mandate protesters in February 2022.

Asia outlook

1



“The demographics of New Zealand are changing and growing. There are so many cultures here now. It’s important to have those good relationships for all of our visitors to Aotearoa. That’s part of welcoming them here, having good relationships with their home countries as well.”

Female, 43, Pasifika/Māori, Waikato

DO NEW ZEALANDERS VIEW ASIA AS AN IMPORTANT PART OF OUR FUTURE?

This section asks New Zealanders to consider the importance of New Zealand developing ties with Asia, as well as the importance of Asia and its sub-regions to New Zealand’s future.



Key findings



Developing ties with Asia is seen as increasingly important for New Zealand's future.

Asia is considered the second-most important region to New Zealand's future.

North Asia continues to be rated as the most important sub-region in Asia for New Zealand's future, followed by Southeast Asia and South Asia.

New Zealanders see developing ties with Asia as important.

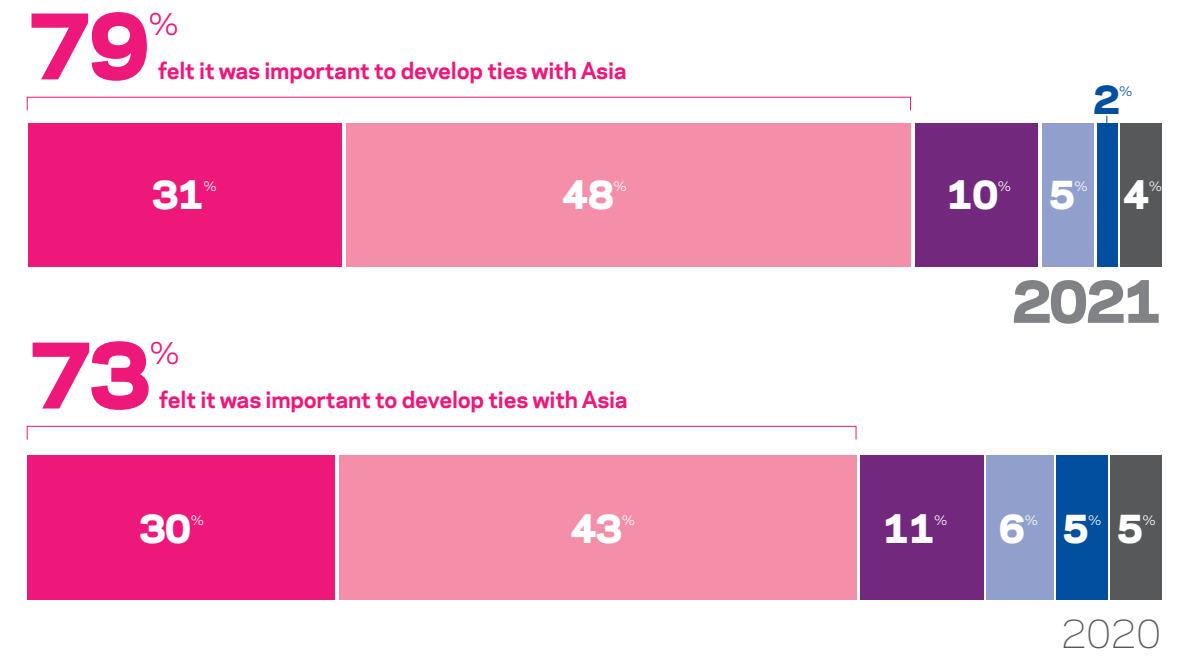
Four in five New Zealanders (79 percent) believe it is important to develop political, economic and social ties with Asia (see figure 1). This has increased from 73 percent in 2020 and substantially increased from the 2019 result when three in five New Zealanders (67 percent) held this view.

New Zealanders over the age of 30 are more likely to see developing ties as important (81 percent) than New Zealanders under 30 (74 percent); however this has increased from the 2020 survey, which recorded that 68 percent of New Zealanders under 30 felt developing ties with Asia was important.

Across the regions, respondents from Canterbury and Manawatu-Whanganui are more likely to perceive the importance of developing ties with Asia (84 percent), with respondents from Southland and Gisborne/Hawke's Bay less likely to perceive developing ties as important (66 percent and 67 percent respectively).

Figure 1

How important do New Zealanders think it is to develop ties with Asia?



- Very important
- Quite unimportant
- Quite important
- Very unimportant
- Neither important nor unimportant
- Don't know

Source: Q1a11 — Overall, how important do you think it is for New Zealand to develop political, economic and social ties with the peoples and countries of Asia?

Base: All New Zealanders (2020 n=2,001, 2021 n=2334)

Asia is perceived as the second-most important region to New Zealand's future.

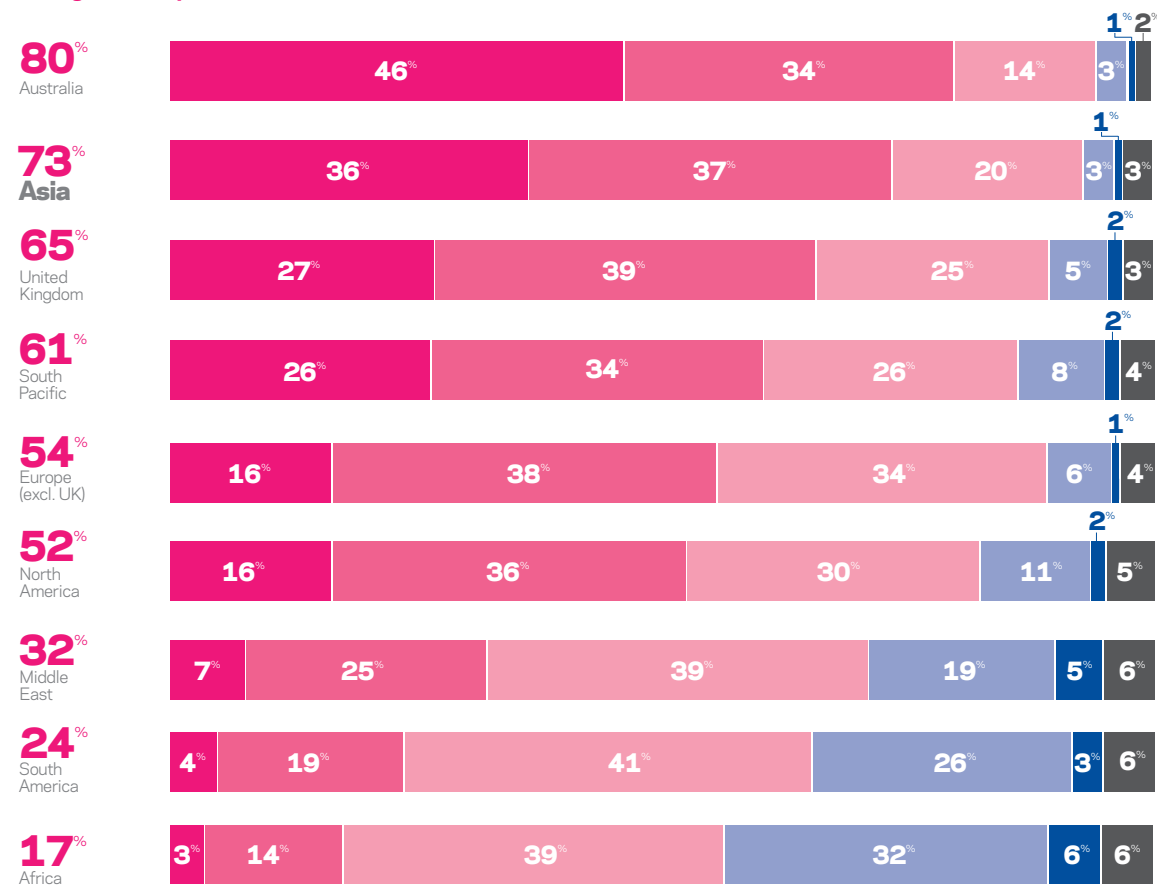
New Zealanders continue to view Asia as the second-most important region to New Zealand's future, second only to Australia (see figure 2). This result has remained unchanged since 2017.

Seventy-three percent of New Zealanders believe Asia is important or very important to New Zealand's future, up slightly from 2020 (72 percent).

Figure 2

How important are the different regions of the world to New Zealand's future?

Percentage of people who felt the region was important:



● Very important
● Important
● Somewhat important
● Not very important
● Not at all important
● Don't know

Source: Q1a — How important do you think each of the following regions are to New Zealand's future?

Base: All New Zealanders (n=2,334)

New Zealanders perceive North Asia to be the most important sub-region.

We asked New Zealanders to rate the sub-regions of Asia in terms of their perceived importance to New Zealand's future (see figure 3).

We examined three main sub-regions:

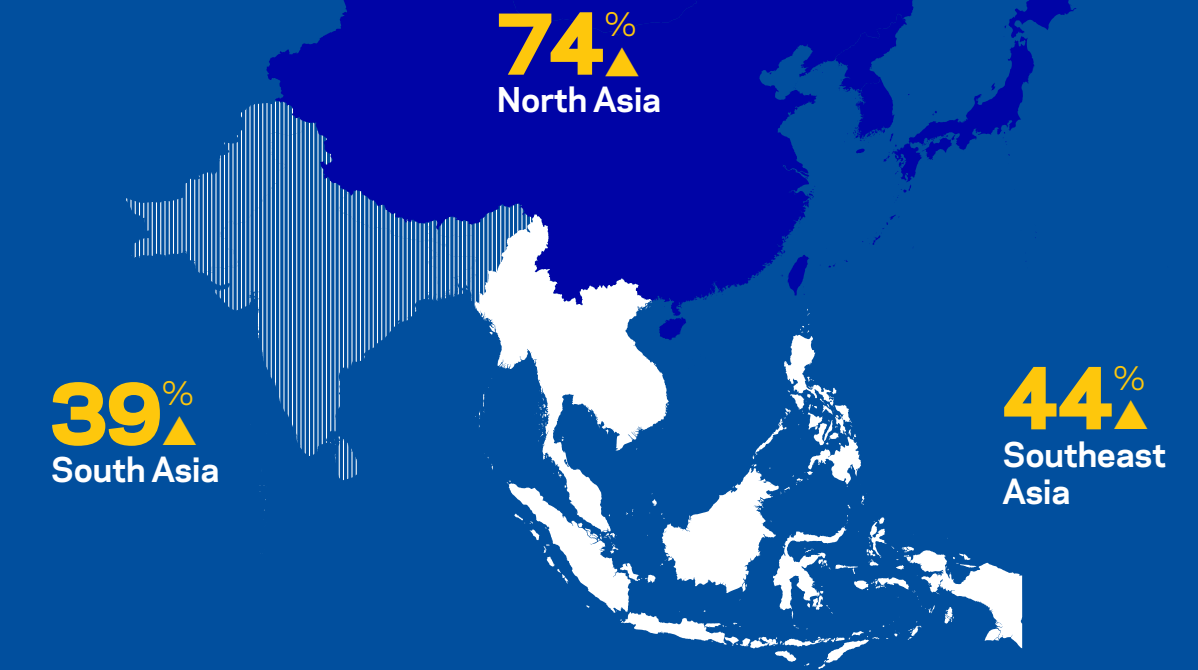
- North Asia (including countries such as China, Japan and South Korea);
- South Asia (including countries such as India, Sri Lanka and Bangladesh); and
- Southeast Asia (including countries such as Singapore, Thailand and Malaysia).

New Zealanders' perception of the importance of Asia's sub-regions has increased across the board. Seventy-four percent of New Zealanders said North Asia was important to New Zealand's future, up from 71 percent in 2020. Forty-four percent of New Zealanders rated Southeast Asia to be important to New Zealand's future, up from 42 percent in 2020. South Asia is perceived to be important to New Zealand's future by 39 percent of New Zealanders, up from 37 percent in 2020.

Figure 3

How important are the Asia sub-regions to New Zealand's future?

Percentage of people who felt these different regions of Asia are at least 'important'



Source: Q1ai - How important do you think each of the following Asian regions are to New Zealand's future?

Base: All New Zealanders (n= 2,334)

“They’re [Asia] our neighbours, they’re geographically close to us. I guess culturally ... they are very close to parts of the New Zealand and Māori culture as well. As we [NZ] become a more holistic society, those different cultures will find more similarities here. It’s important to have relationships with your neighbours.”

Male, 31, Māori/NZ European, Auckland

HOW DO NEW ZEALANDERS PERCEIVE REGIONAL POLITICAL, SECURITY, AND ECONOMIC DYNAMICS?

This section looks at how New Zealanders perceive Asian countries relative to others; how they perceive regional political, security, and economic dynamics; and their perceptions of how New Zealand is engaging in the region and navigating regional issues and challenges.



Key findings



New Zealand's closest 'friends' in Asia are seen to be Japan, Singapore and South Korea.

New Zealanders feel that the United States is a friendlier country than in previous years. Russia and North Korea are seen as the biggest threats.

New Zealanders believe extra effort could be put into growing our relationships in Asia, particularly to realise trade, tourism, and technological innovation benefits.

New Zealanders have low levels of trust in Russia and China to act responsibly in the world.

Cyberattacks and the impact of fake news are top of mind concerns for New Zealanders in terms of potential future threats.

New Zealanders consider Japan, Singapore, and South Korea to be important defence and security partners in Asia.

Covid-19 has not negatively impacted perceptions of Asia for most New Zealanders.

New Zealanders' perceptions of 'friends and threats' in Asia and across the globe.

We asked New Zealanders to tell us the countries they view as a 'friendly country' (a country viewed as safe and trustworthy) as well as countries they view as 'threatening' (a country viewed with caution or suspicion).

New Zealand's closest 'friends' in Asia are Japan, Singapore and South Korea.

New Zealanders continue to see Japan as the friendliest nation in Asia, with 68 percent rating Japan as a 'friend' (down slightly from 2020). Singapore (65 percent) and South Korea (49 percent) round out the top three Asian countries rated friendliest to New Zealand (see figure 4).

New Zealanders perceive most ASEAN nations as friendly, but views on Myanmar have shifted.

We asked New Zealanders about their perceptions of seven of the ten members of the Association of Southeast Asian Nations (ASEAN). New Zealanders generally perceive Singapore (65 percent), Thailand (45 percent), Malaysia (44 percent), Philippines (44 percent), Viet Nam (35 percent), and Indonesia (33 percent) to be friendly towards New Zealand.

One country that is bucking the trend is Myanmar (Burma), which has seen a decline in its perceived friendliness to New Zealand to 14 percent, down from 17 percent in 2020. In terms of threat perception, 17 percent of New Zealanders consider Myanmar to be a threatening country, up six percentage points from 2020 (see figure 5). We asked New Zealanders additional questions about their views on the 2021 military coup in Myanmar; see page 31.

Perceptions of China are largely unchanged from 2020, but have shifted from 2019.

Just under one third of New Zealanders (29 percent) perceive China to be friendly to New Zealand, down two percentage points from 2020. Thirty-seven percent of New Zealanders perceive China to be threatening, a small increase on 2020 (36 percent). Perceptions of China have shifted significantly since 2019, when 40 percent of New Zealanders rated China as friendly and 22 percent perceived China to be threatening. We asked New Zealanders additional questions about their views on New Zealand's engagement with China; see page 29.

North Korea and Russia are considered the most threatening countries.

Sixty-four percent of New Zealanders consider North Korea to be threatening (unchanged from 2020), followed by Russia at 45 percent (up from 42 percent in 2020, and 34 percent in 2019). [Note: the survey was undertaken prior to Russia's invasion of Ukraine in 2022].

The United States rated more friendly towards New Zealand in 2021.

Between 2020 and 2021, the United States has seen a significant increase in its perceived friendliness towards New Zealand, with 61 percent of New Zealanders rating the US as friendly, up from 50 percent in 2020. In terms of threat perceptions, 11 percent of New Zealanders consider the US to be a threatening country, down nine percentage points from 2020 (see figure 5).

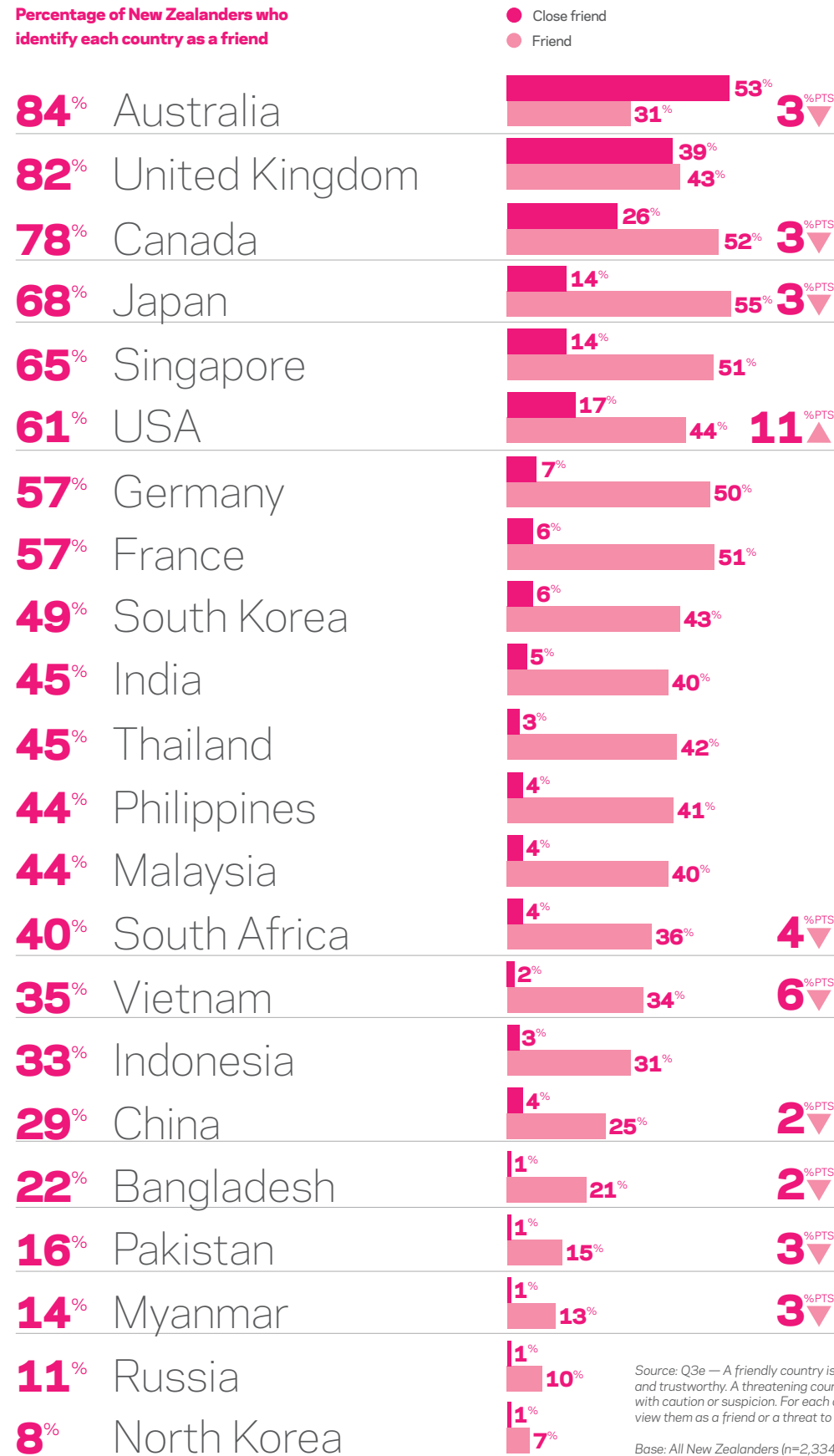
Australia remains New Zealand's closest friend.

New Zealanders continue to see Australia as New Zealand's closest friend, with 84 percent of New Zealanders perceiving Australia to be friendly towards New Zealand (down three percentage points from 2020). Other countries rated as close friends of New Zealand include the United Kingdom (82 percent) and Canada (78 percent).

Figure 4

Which countries are friends to New Zealand?

Percentage of New Zealanders who identify each country as a friend



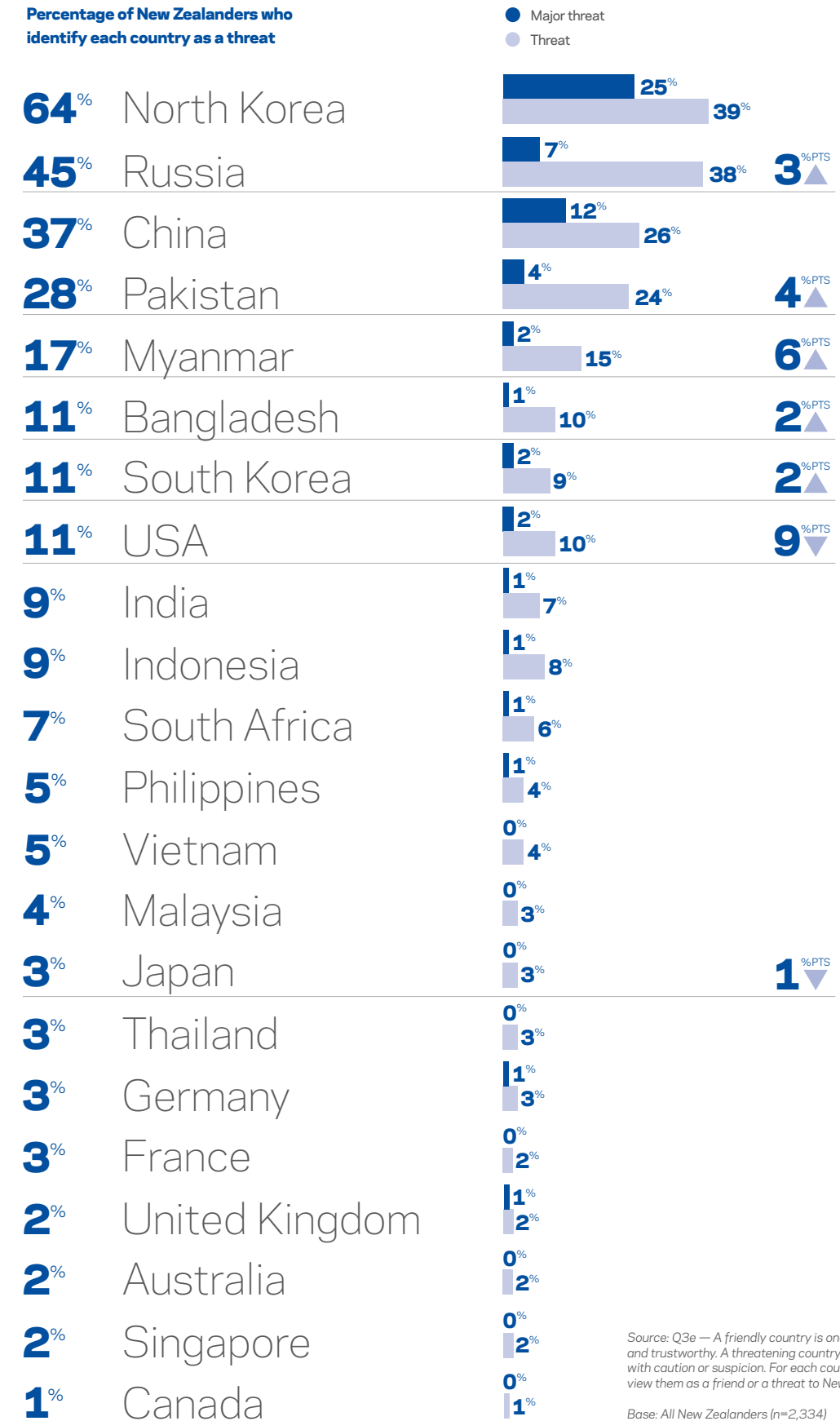
Source: Q3e — A friendly country is one you view as safe and trustworthy. A threatening country is one you view with caution or suspicion. For each country below, do you view them as a friend or a threat to New Zealand?

Base: All New Zealanders (n=2,334)

Figure 5

Which countries are threats to New Zealand?

Percentage of New Zealanders who identify each country as a threat



Source: Q3e — A friendly country is one you view as safe and trustworthy. A threatening country is one you view with caution or suspicion. For each country below, do you view them as a friend or a threat to New Zealand?

Base: All New Zealanders (n=2,334)

New Zealanders want to build relationships to further trade, security and defence cooperation, and technological innovation.

New Zealanders were asked which country they felt New Zealand should put extra effort into developing a stronger relationship with and why. In priority order, the countries selected were Australia, China, the United States, the United Kingdom, India, Japan, and Canada. This finding is largely in line with 2020, where China, India, and Japan also featured as priority countries.

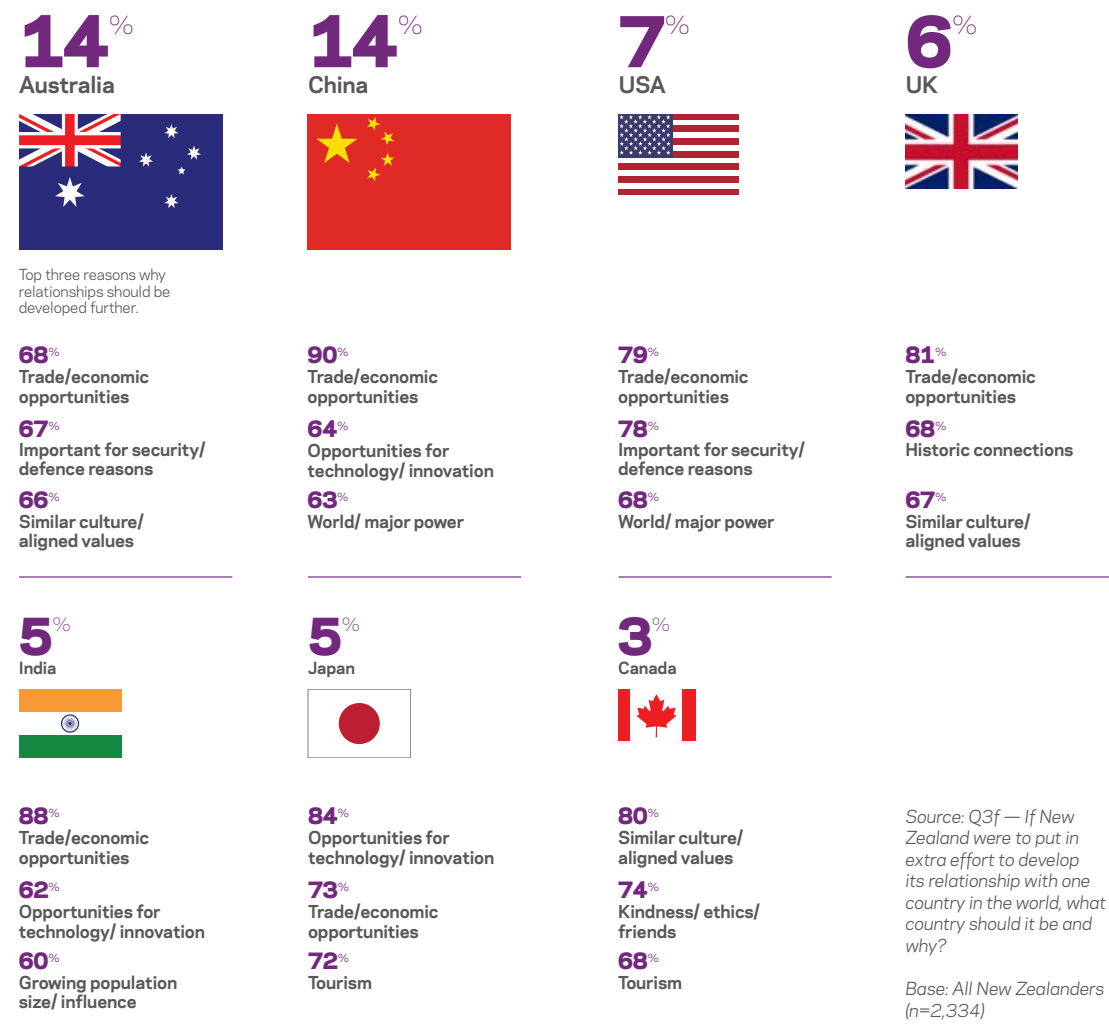
Expanding trade connections was the top priority for New Zealanders across most nations, except in the case of Japan where technology and innovation

cooperation was prioritised, and Canada where shared values and cultural similarities were identified as the priority reason for developing the relationship.

New Zealanders provided a range of reasons why extra effort was needed to develop its relationships with particular countries. Reasons ranged from realising the benefits of technology and innovation sharing and connecting with countries of global influence (China and India); defence and security cooperation (Australia and the United States); and increasing tourism flows (Japan and Canada) (see figure 6).

Figure 6

Which countries should New Zealand develop its relationship with?



Trust in major powers

For the first time we asked New Zealanders about their level of trust in major powers to act responsibly in the world.

The United Kingdom (58 percent) and Japan (49 percent) are perceived to be the most responsible major powers. New Zealanders over the age of 60 are most likely to express high trust in the United Kingdom (76 percent).

New Zealanders are split in their trust of the United States to act in a responsible manner in the world. Roughly a third of New Zealanders (34 percent) trust in the United States to act in a responsible manner while just under a third (31 percent) express low levels of trust.

Ten percent of New Zealanders trust China to act responsibly in the world, with 58 percent expressing a lack of trust.

New Zealanders express the least confidence in Russia to act responsibly in the world, with 63 percent* expressing a lack of trust.

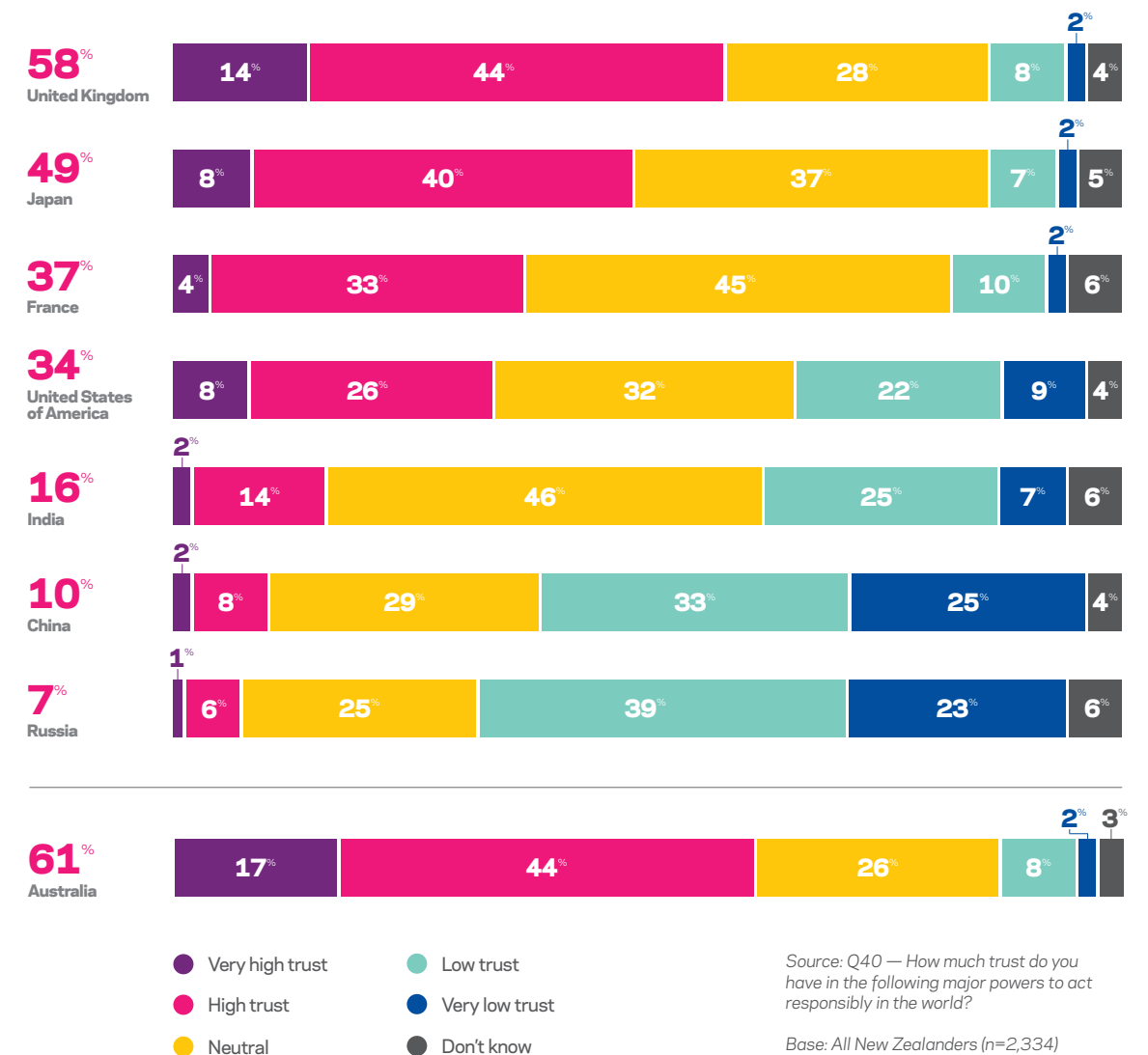
For comparison, we also asked New Zealanders about their level of trust in Australia to act responsibly in the world. Sixty-one percent of New Zealanders trust Australia to act in a responsible manner.

*The survey occurred before the invasion of Ukraine by Russia in February 2022.

Figure 7

Trust in major world powers

Percentage of New Zealanders who express high trust in the following major world powers.



Threats to New Zealand's vital interest over the coming decade.

We asked New Zealanders about their level of concern relating to possible threats to New Zealand's vital interests over the coming decade, on a scale of high (10) to low (1) concern. These concerns were not specific to Asia.

'Non-traditional' security threats are top of mind for New Zealanders, with the threat posed by 'fake news'/misinformation and potential cyberattacks of highest concern (see figure 8). Fifty-three percent of New Zealanders expressed high levels of concern ('8 or above') on these issues. Covid-19 and other pandemics (52 percent rating '8 or above') and climate change (51 percent rating '8 or above') are also seen to be concerning threats to New Zealand's vital interests.

New Zealanders are also generally concerned about the potential impacts of terrorism and violent extremism, global competition for scarce resources including water, and the impact of a potential worsening of global economic conditions over the coming decade. New Zealanders are moderately concerned about 'traditional' security threats, for example the prospect of a military conflict between major powers in Asia.

The prospect of territorial or resource claims in Antarctica and humanitarian or security challenges in the Pacific elicited comparatively lower levels of concern from New Zealanders.

Covid-19 has not negatively impacted perceptions of Asia for most New Zealanders.

When asked whether Covid-19 had impacted their view of Asia, 56 percent of New Zealanders said that it had not. A further nine percent said the pandemic had positively impacted their view of Asia. Thirty percent of respondents agreed that the pandemic had negatively impacted their perception of Asia, with New Zealanders over the age of 60 more likely to feel this way (38 percent).

" Misinformation, especially from Russia... I suppose a lot of common misinformation coming out about the virus. Especially when Trump was in power... there was a lot of misinformation coming out from him as well."

Male, 55, NZ European, Wellington

" Climate change is happening all around the world, every day. We need to do something about it."

Female, 32, Māori/NZ European, Wellington

" Early on [in the pandemic], there were cases of countries like Singapore and Taiwan who had managed [Covid] really well but then, you know, things got out of hand later on."

Male, 29, NZ European, Auckland

Figure 8

Concern levels over potential threats to New Zealand's vital interests



Source: Q42 — How concerned, or not, are you with the following possible threats to New Zealand's vital interests over the next 10 years?

Base: All New Zealanders (n=2,334)

New Zealanders consider Japan, Singapore, and South Korea to be important defence and security partners in Asia.

When asked which countries in Asia are important defence and security partners for New Zealand, New Zealanders rated Japan (53 percent), Singapore (41 percent), and South Korea (34 percent) as important defence and security partners to collaborate with. Japan and Singapore are also perceived to be the friendliest countries in Asia towards New Zealand (see figure 4).

Close to a third of New Zealanders (31 percent) perceive China to be an important security and defence partner, while a quarter (26 percent) view India as an important partner to work with.

A fifth of those surveyed (22 percent) were unsure of which Asian countries were New Zealand's most important security and defence partners, with New Zealanders aged 18-24 years most likely to be unsure (29 percent).

“Obviously, we have a good relationship with Asia already. Free trade, and even when the [Christchurch] earthquake happened, one of the first countries to turn up was Singapore. I mean, Japan was pretty much close second. We obviously are good friends with them.”

Male, 55, NZ European, Wellington

Source: Q43 - In terms of New Zealand's defence and security, which Asian countries are New Zealand's most important partners to work with?

Base: All New Zealanders (n=2,334)

Figure 9

Important security partners in Asia



WHAT DO WE THINK ABOUT NEW ZEALAND FOREIGN POLICY REGARDING ASIA?

This section looks at New Zealanders' awareness and perception of foreign policy issues relating to Asia, including the recent Myanmar coup, and New Zealanders' perceptions of potential government policies towards China.



Key findings



A majority of New Zealanders are aware of the military coup in Myanmar.

Most respondents support the New Zealand government formulating a response.

New Zealanders feel the New Zealand Government should continue to engage with China.

Three-quarters of New Zealanders would like to see New Zealand broaden trade beyond the Chinese market.

Foreign policy perspectives: New Zealand's relationship with China

New Zealand's relationship with China has featured prominently in public discourse in recent times.

In 2021, we asked New Zealanders about their level of agreement or opposition to a set of policy propositions relating to New Zealand's relationship with China across economic, diplomatic, security, and people-to-people policy spheres.

On trade and business links, three in four New Zealanders (76 percent) agree that New Zealand should seek out other markets to reduce economic reliance on the Chinese market (see figure 10). New Zealanders have mixed views on whether firms from China should supply technology for critical infrastructure. Thirty-eight percent of New Zealanders say they oppose allowing firms from China to supply technology for critical infrastructure, while 32 percent favour allowing firms from China to do so. New Zealanders have a higher level of support for allowing firms from China to supply technology for non-critical infrastructure projects. Thirty-eight percent of New Zealanders are supportive of this prospect.

On political and security matters, a majority of New Zealanders (53 percent) support New Zealand and China undertaking regular, high-level political dialogues between leaders. Forty percent of New Zealanders see value in jointly funding aid projects in our region, while just over a quarter of New Zealanders (27 percent) oppose collaboration of this kind. Forty-five percent of New Zealanders oppose New Zealand conducting joint military exercises involving China and other countries. Sixty-three percent of New Zealanders are supportive of the potential imposition of travel and financial sanctions on Chinese officials associated with abuses of human rights.

In terms of people-to-people connections, most New Zealanders supported New Zealand athletes participating in the 2022 Winter Olympics hosted by Beijing (56 percent). New Zealanders also say they support academic collaboration between New Zealand and Chinese experts, with 60 percent in favour of such cooperation.

As noted on page 22, when asked which country New Zealand should put additional effort into developing its relationship, New Zealanders ranked China as the most important focus country just after Australia (see figure 6).

“With China, it's a double-edged sword. We want to be on good terms with them, but we're very wary of what they could do as well, because they could swing either way.”

Female, 24, Malaysian, Auckland

“We have a relatively advanced relationship. I mean, we were the first country to have an FTA with China back in 2008. We've had quite an active relationship over that time. There's some potential uncertainties at large, mainly questions around human rights, animal welfare and environmental protection. Generally, it's a good relationship, but there is some unease around those areas because you get mixed messages depending on who you're listening to. It's a hard one to have certainty on.”

Male, 31, Māori/NZ European, Auckland

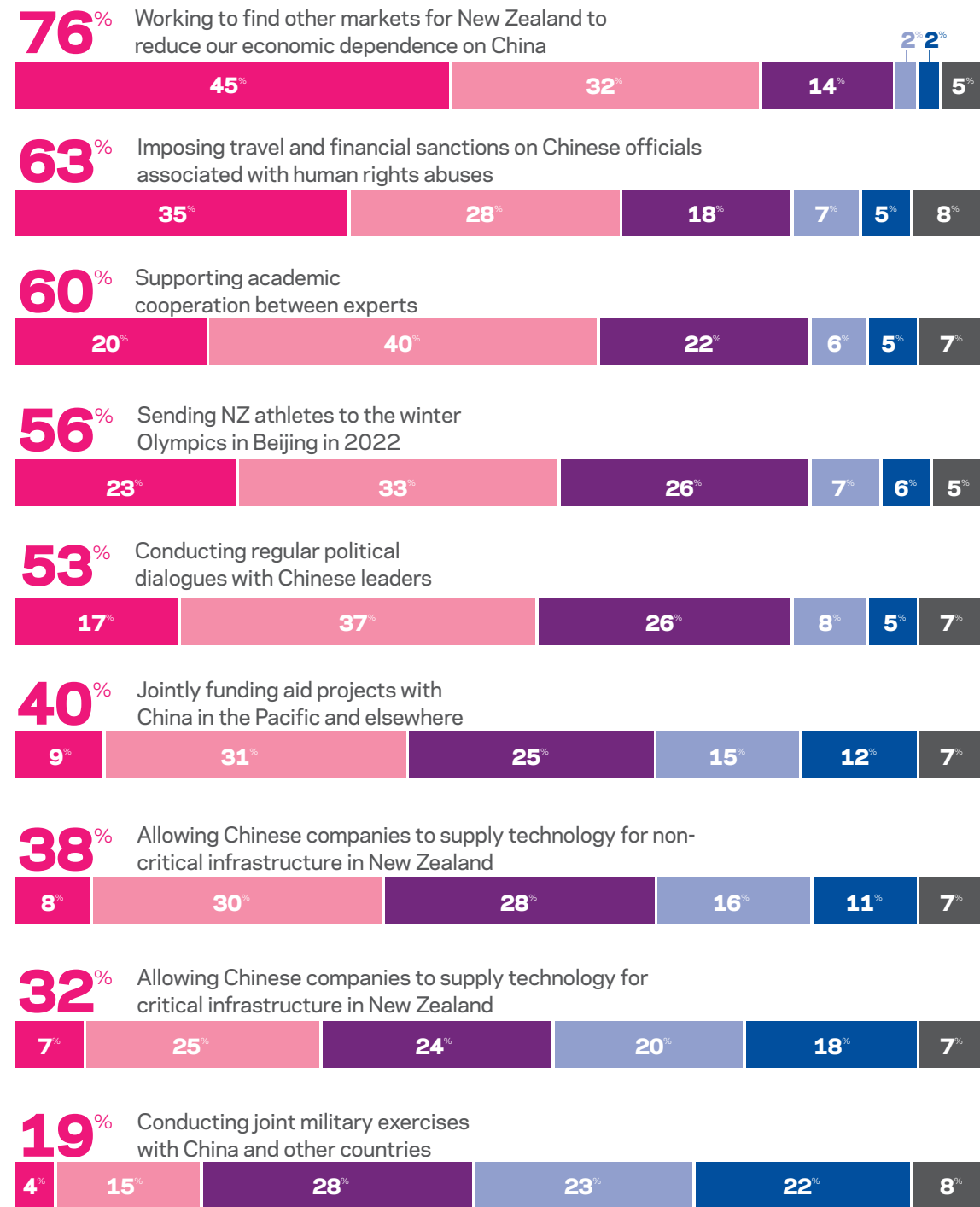
“Because we're so reliant on [China], we can't really do much [about the things that we don't agree with] because they could just cut all ties. We'd be pretty stuck as an economy. It'd be beneficial to set up new trade relations [elsewhere] and not be as reliant on China in the future.”

Male, 23, Māori, Nelson

Figure 10

Support for potential policies regarding China

Percentage of New Zealanders who support this policy proposition



● Strongly support
● Somewhat support
● Neither support nor oppose
● Somewhat oppose
● Strongly oppose
● Don't know

Source: Q45— Would you support or oppose the following potential New Zealand government policies towards China?
Base: All New Zealanders (n=2,334)

Foreign policy perspectives: Myanmar

A majority of New Zealanders (59 percent) were aware a military coup took place in Myanmar in February 2021 (see figure 11).

We asked New Zealanders who were aware of the coup for their views on what potential actions they would support New Zealand taking in response to the 2021 developments in Myanmar. Over three quarters of respondents (77 percent) supported New Zealand responding in some form.

Forty-two percent expressed support for the New Zealand government issuing statements calling for calm and the protection of human rights. Just over a third of respondents (35 percent) supported New Zealand involvement in a regional diplomatic response with other international partners.

A quarter of respondents supported a more direct response either through aid assistance to the people of Myanmar (25 percent) or providing support through the New Zealand Defence Force to provide logistical capability for humanitarian aid or assisting with peacekeeping (24 percent) (see figure 12).

Figure 11

Myanmar coup awareness

In February 2021, there was a military coup in Myanmar. Were you aware of this event?

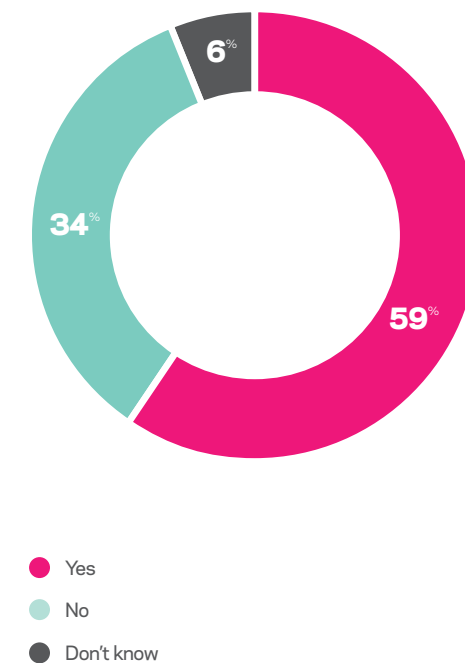
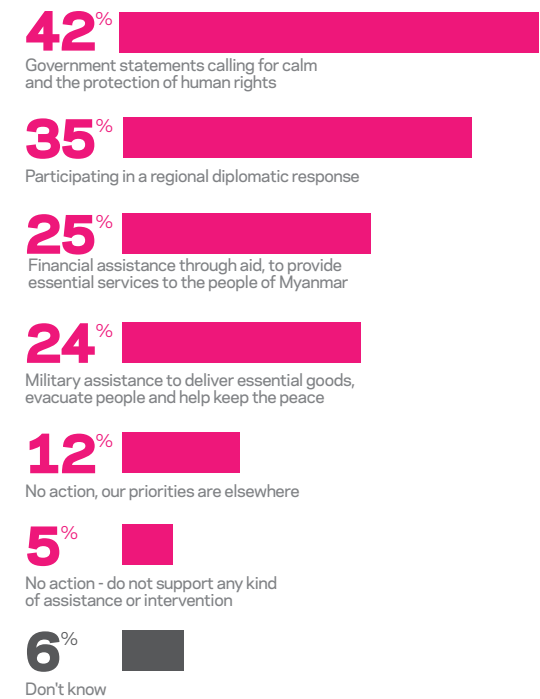


Figure 12

Desired response

What response, if any, would you like to see from New Zealand?



Source: Q44 & Q44a

Base: All New Zealanders (n=2,334)

“There’s a lot of the countries in Asia I’d like to visit. I’m interested in going to Malaysia, Singapore, Viet Nam... having a good look at the different cultures and the different countries. They just look really beautiful. And it’s the different rituals and cuisine, just the whole package. And just also when we went to Japan everybody was just so respectful and it just felt like a really friendly place to visit.”

Female, 57, Pacific, Auckland

HOW HAS COVID-19 IMPACTED NEW ZEALANDERS' INTEREST IN TRAVELLING TO ASIA?

This section explores New Zealanders' perceptions of the impacts of Covid-19 on New Zealand and its relationship with Asia, and sentiments around mobility.



Key findings



Three-quarters of New Zealanders are interested in travelling overseas again once practical.

After Australia, Asia is the top destination for New Zealanders seeking to travel again.

New Zealanders are interested in travelling to Asia to reconnect with family and friends, or for tourism.

Interest in Asia travel has not been impacted by the pandemic for the majority of New Zealanders.

Three in four New Zealanders are interested in travelling overseas when they can.

In 2021, we asked New Zealanders about their interest in overseas travel. Three in four New Zealanders (75 percent) are interested in travelling overseas when it is possible and practical to do so (see figure 13).

Visiting Asia is a priority for New Zealanders interested in overseas travel.

Asia is a priority destination for New Zealanders, second only to Australia in terms of preferred first destination of travel (see figure 14). Asia is the highest priority travel destination for younger New Zealanders; a quarter of New Zealanders under the age of 30 (24 percent) said that they wish to visit Asia ahead of any other region once travel is possible.

The desire to visit friends and family, as well as tourism will drive demand for Asia travel.

New Zealanders interested in visiting Asia said visiting friends and family (53 percent) and tourism (42 percent) were the primary reasons why they wish to travel. Visiting friends and family in Asia is a significant priority for Asian New Zealanders (77 percent).

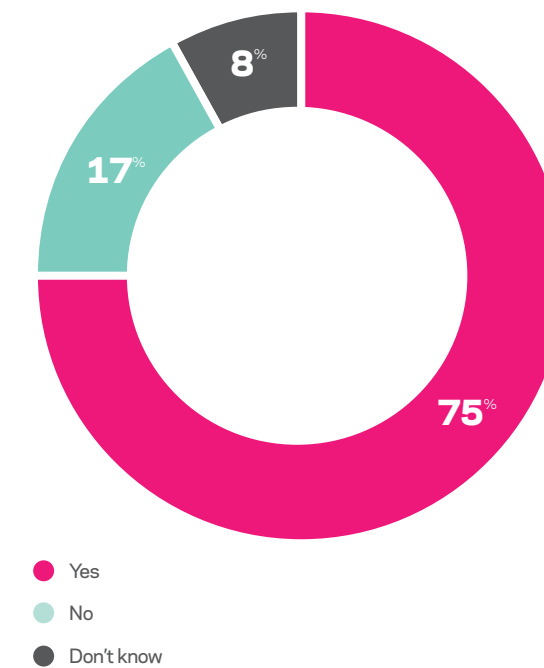
Interest in Asia travel has not been impacted by the pandemic for the majority of New Zealanders.

Two-thirds of New Zealanders (67 percent) have either the same, or a greater level of interest in travelling to Asia despite the Covid-19 pandemic. New Zealanders between the ages of 25 to 39 are most likely (73 percent) to have the same or greater level of interest in travelling to Asia than before the pandemic. Fewer New Zealanders over the age of 60 said they had the same or greater interest in travelling to Asia as result of the pandemic (59 percent).

Figure 13

Overseas travel

Once travel is possible and practical, are you interested in travelling overseas?



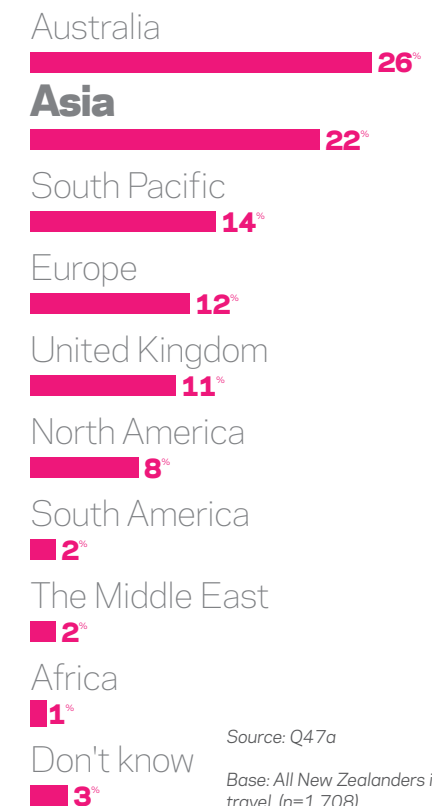
Source: Q4.7

Base: All New Zealanders (n=2,334)

Figure 14

Desired destinations

Which region would you like to visit first?



Source: Q4.7a

Base: All New Zealanders interested in travel (n=1,708)

Asia at home



“It’d be useful for [New Zealanders who want to work in Asia] to learn the main cultural differences, and scratch up on a bit of language, but the best way to learn is probably while you’re in the thick of it.”

WHAT DO NEW ZEALANDERS KNOW ABOUT ASIA?

This section examines New Zealanders' knowledge of Asia, and how connected they feel to the region.



Key findings



China is the country New Zealanders most closely associate with "Asia."

Half of New Zealanders (51 percent) believe themselves to have 'at least a fair amount' of knowledge about Asia. North Asia is the region New Zealanders feel they know the most about.

Fewer New Zealanders (21 percent) felt a strong connection to Asia in 2021 than compared to 2020 (26 percent).

"China" and "food" are the words we most closely associate with Asia.

We asked New Zealanders to tell us the first word they thought of when they heard or saw the word 'Asia' (see Figure 15). For the third year running, the most common response (34 percent) was 'China'. Other commonly mentioned words include 'food', references to people and population, and other countries in Asia like 'India' and 'Japan'.

Figure 15

What words do we associate with Asia?

Source: Q1d - When you see or hear the word "Asia", what is the first word that pops into your mind?

Base: All New Zealanders (n=2,334)



How New Zealanders rate their knowledge of Asia.

Half of those surveyed (51 percent) felt that they know a 'fair amount' or 'a lot' about Asia (see figure 16) – a figure largely unchanged since 2019 but notably higher than previous years. In 2017, 43 percent of New Zealanders rated themselves as knowledgeable about Asia, while in 2014 only 36 percent of New Zealanders considered themselves knowledgeable about Asia.

As in 2020, New Zealanders' self-assessed knowledge of Asia is slightly behind their knowledge of Europe (55 percent) and the South Pacific (54 percent), but almost twice as high as their knowledge of the Middle East (28 percent), South America (25 percent), and Africa (23 percent) (see figure 16).

New Zealanders in the Auckland region have higher than average self-assessed knowledge of Asia (61 percent). Respondents from Waikato (41 percent) and Southland (40 percent) have lower self-assessed knowledge of Asia (see figure 17).

Figure 16

How much do New Zealanders know about different regions and countries of the world?

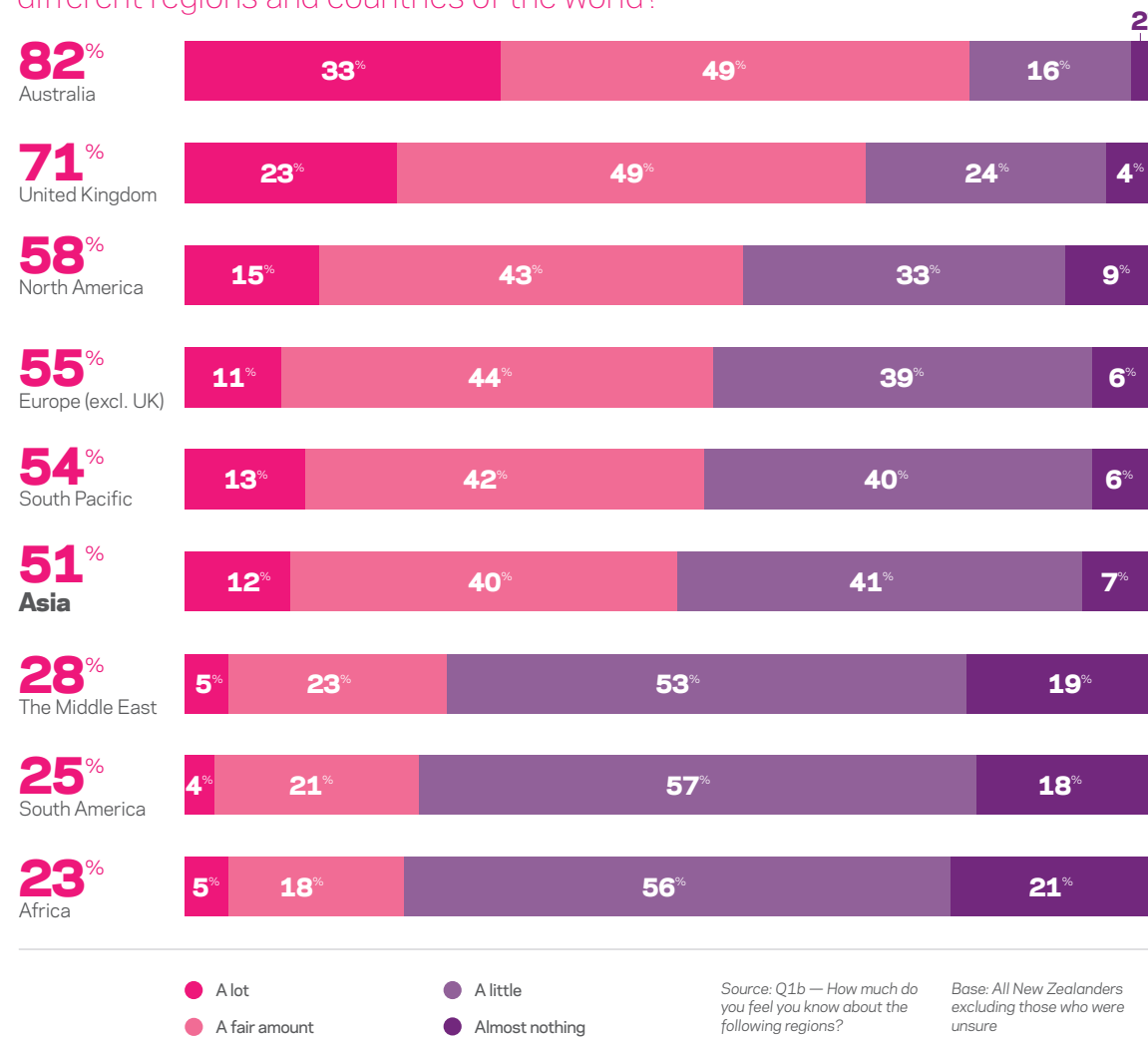
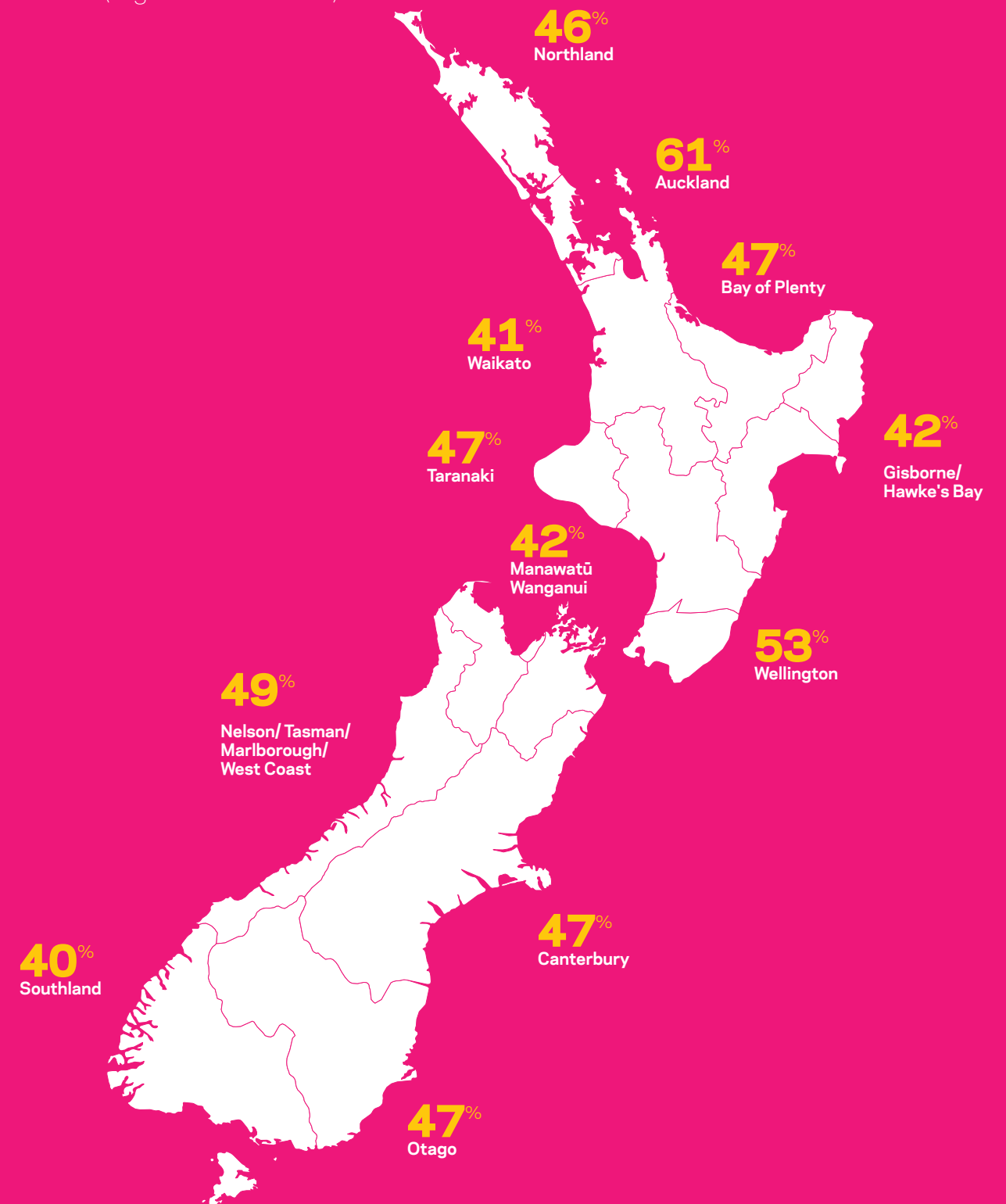


Figure 17

Percentage of New Zealanders who know at least 'a fair amount' about Asia (regional breakdown)



Source: Q1b — How much do you feel you know about the following regions? Base: All New Zealanders excluding those who were unsure

New Zealanders know the most about North Asia.

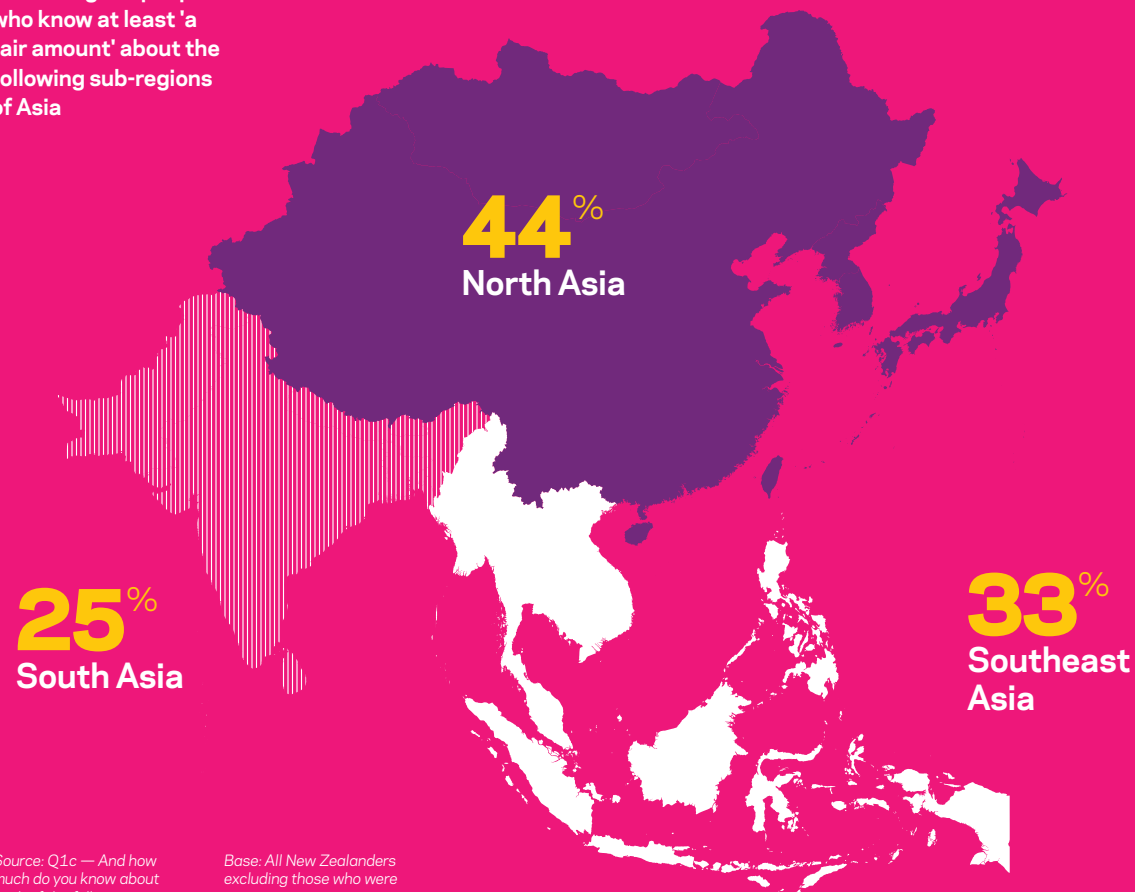
When asked about their knowledge of Asia's sub-regions, 44 percent of New Zealanders said they know a 'fair amount' or 'a lot' about North Asia (see figure 18). North Asia is also the sub-region New Zealanders rate as most important to New Zealand's future (see figure 3).

Thirty-three percent of New Zealanders say they know at least a fair amount about Southeast Asia, a figure unchanged from 2020. A quarter (25 percent) of New Zealanders say they know a fair amount about South Asia; this finding is also unchanged from 2020.

Figure 18

How much do we know about Asia's sub regions?

Percentage of people who know at least 'a fair amount' about the following sub-regions of Asia



Source: Q1c — And how much do you know about each of the following parts of Asia?

Base: All New Zealanders excluding those who were unsure

Day-to-day connections with Asia.

We asked New Zealanders how connected they felt in their day-to-day lives with Asian cultures, places or people over the past five years on a scale of one to ten (see figure 19). We first introduced this question in 2020.

While the majority of New Zealanders felt connected, fewer New Zealanders (21 percent) felt a strong connection to Asia compared to 2020 (26 percent). More New Zealanders said they felt a weak connection (31 percent) to Asia than in 2020 (26 percent).

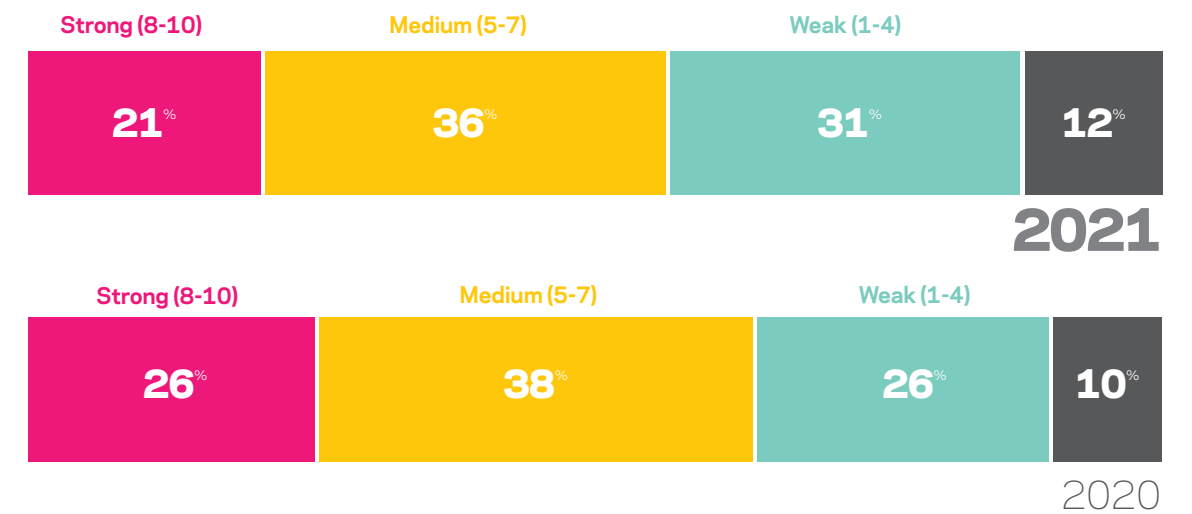
New Zealanders in the Auckland region on average feel the strongest connection with Asia (30 percent). Residents in the following regions are less likely to feel a strong day-to-day connection with Asia:

- Nelson / Tasman / Marlborough / West Coast (10 percent)
- Northland (12 percent)
- Bay of Plenty (13 percent)
- Waikato (14 percent).

Figure 19

Strength of connection with Asia

Connection with Asian cultures, places, and people



- Strong (8-10)
- Medium (5-7)
- Weak (1-4)
- Don't know/would rather not say

Source: Q31 — Looking back over the past five years, how connected have you felt, in your daily life, with Asian cultures, places or people who identify as Asian?

Base: All New Zealanders (n=2,334)

The more New Zealanders know about Asia, the more they consider it important.

As in previous years, there continues to be a correlation between an individual's daily connections with Asia and both their self-assessed Asia knowledge level and their perception of Asia's importance for New Zealand's future. New Zealanders who feel more connected with Asia are more likely to have higher Asia knowledge levels and to consider Asia as important for New Zealand's future.

Eighty-three percent of those who feel a connection with Asia believe the region is important to New Zealand's future, compared to 71 percent of those with a weak daily connection. The gap is even greater when it comes to self-assessed knowledge. Eighty-one percent of New Zealanders with a strong connection with Asia rate themselves as knowing at least a fair amount about the region, compared to just 27 percent of those with a weak connection.

“I didn't have a lot of exposure to it [Asia] myself growing up, but my children do. Learning different languages is more of an option for them than it was for me... I feel it's quite important to be able to learn about the different countries and the cultures, the differences and similarities, so that they can get the bigger world picture...”

Female, 43, Pasifika/Māori/NZ European, Waikato

HOW DO WE THINK ASIA WILL IMPACT NEW ZEALAND?

This section examines the future impacts that New Zealanders think Asia will have on our country. It also explores how the Covid-19 pandemic has impacted our views of Asia.



Key findings



New Zealanders expect their connections with Asia to lead to positive outcomes over the next two decades, including in the areas of tourism and technological innovation.

New Zealanders are becoming concerned about the possible negative impacts of Asia's political and security situation.

New Zealanders foresee a range of positive developments and benefits emerging from New Zealand's connections with Asia.

We asked New Zealanders for their views on a range of issues where Asia may impact New Zealand over the coming ten to 20 years.

Tourism from Asia to New Zealand.

New Zealanders continue to feel that having direct tourism linkages with Asia will be beneficial to New Zealand over the coming decades (see figure 20). Seventy-seven percent of New Zealanders view tourism flows from Asia to New Zealand as having a positive impact on the country's future – a level of support slightly decreased from pre-pandemic levels.

Technology, innovation, cultural flows, and immigration.

New Zealanders are optimistic about the future impact of technology, innovation, and culture from Asia to New Zealand. Seventy-seven percent of New Zealanders believe technological developments and innovation originating in Asia will have a positive impact on New Zealand in the coming two decades.

The majority of New Zealanders (54 percent) feel New Zealand will benefit culturally from Asia over the coming decades. Seven percent of New Zealanders foresee a negative benefit resulting from cultural flows from Asia to New Zealand, the lowest percentage since this question was introduced in 2007.

Nearly half of New Zealanders (48 percent) feel immigration from Asia will have a positive impact on New Zealand. Fewer New Zealanders perceive a negative future impact (21 percent) resulting from immigration flows than at any point since the introduction of this question in 2007.

Environmental issues and political and security stability are key concerns for the future.

As in 2020, environmental issues in Asia are an area of future concern for New Zealanders. Thirty-nine percent of New Zealanders believe environmental issues in Asia will negatively impact New Zealand over the coming decades, while 33 percent think they could have a positive impact. These findings are largely unchanged from 2019 and 2020.

While positive about people-to-people connections, New Zealanders have a mixed outlook on the potential for political and security issues in Asia to impact New Zealand in the future. Thirty-six percent feel positive about how political and security issues in Asia may impact New Zealand, while 29 percent envisage a negative impact – up from 25 percent in 2020 (see figure 20).

“There's a big global shift happening, and I find that exciting. There'll be opportunities [for New Zealand in Asia that] we can't even think about or know about at the moment. The innovation and new ideas that it will offer will be interesting.”

Male, 29, NZ European, Auckland

Figure 20

What positive impacts will the Asia region have on New Zealand in the next 10 – 20 years?

● Positive impact
● Negative impact



Source: Q2b — Thinking about the entire Asia region, and thinking about New Zealand in the next 10–20 years, what kind of impact do you think each of the following will have on New Zealand's future?

Base: All New Zealanders (n=2,334)

HOW DO WE CONTINUE TO BUILD CONNECTIONS WITH ASIA?

This section examines what New Zealanders feel is important to build connections with Asia, as well as the skills New Zealanders need to comprehend Asia's linguistic, cultural, and social diversity.



Key findings



New Zealanders perceive a range of avenues for growing relationships with Asia. Economic, political and cultural initiatives are seen as important for connecting New Zealand and Asia.

New Zealanders have mixed views on whether enough is being done in New Zealand to build understanding of Asia.

Food and travel remain New Zealanders' top Asia-related interests.

Many avenues exist for growing New Zealand's relationships with Asia.

In 2021, we asked New Zealanders how important certain activities were for growing New Zealand's relationships with Asia. New Zealanders see value in undertaking a wide range of activities to develop links with Asia, including business and trade initiatives, political dialogue, fostering people-to-people links, and cultural exchange.

Eighty-nine percent of New Zealanders say commercial relationships are at least somewhat important for developing New Zealand's connections with Asia. The same number of

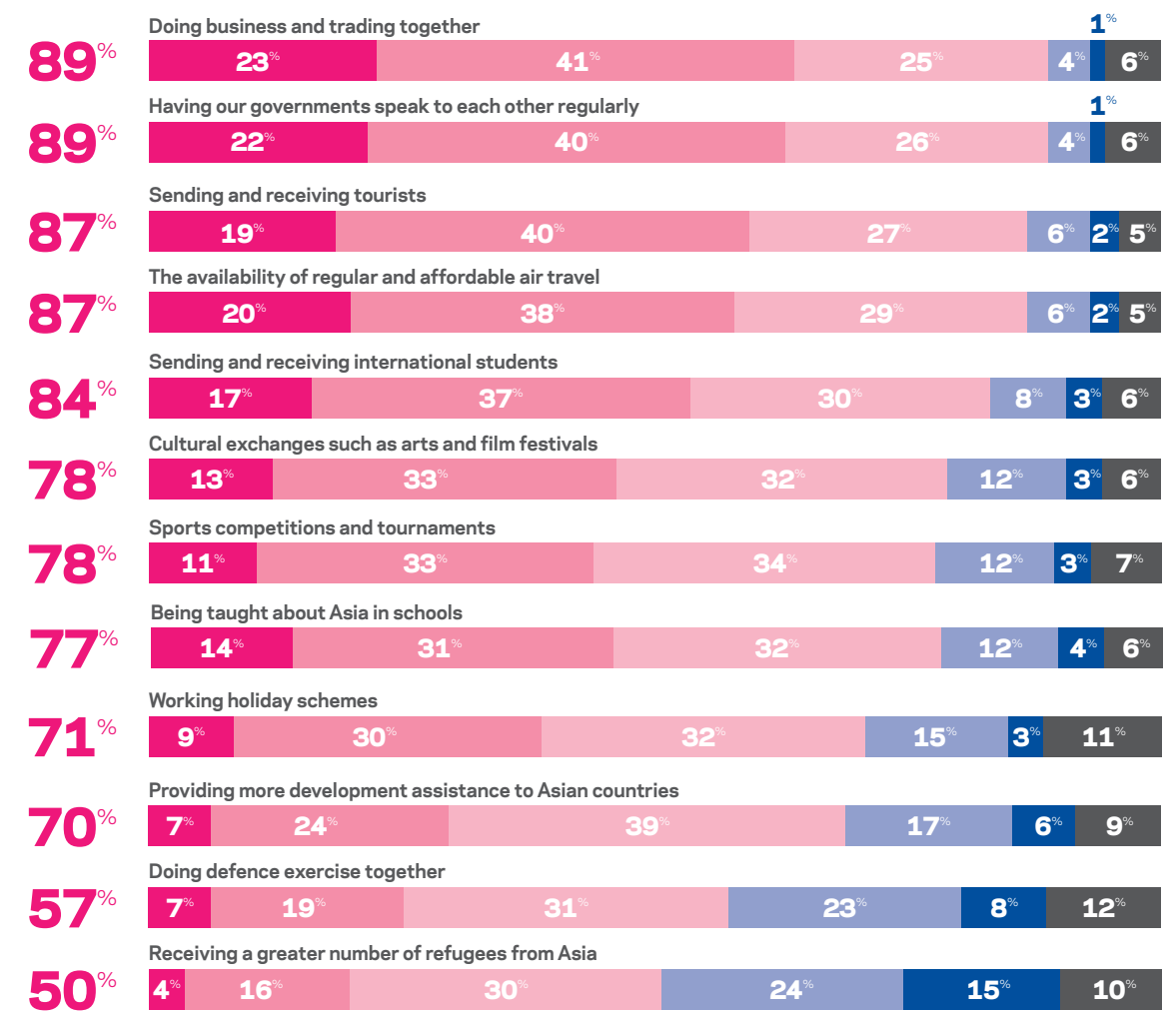
respondents feel that regular dialogue between political leaders and officials are at least somewhat important for relationship building. Travel and tourism in both directions are also considered important for helping to grow New Zealand's relationships with Asia.

New Zealanders are less certain of the importance of activities such as providing additional development assistance, undertaking defence exercises, or receiving a greater number of refugees from Asia.

Figure 21

Ways to grow relationships with Asia

Percentage who feel the following actions are at least 'somewhat important'



- Very important
- Important
- Somewhat important
- Not very important
- Not at all important
- Don't know

Source: Q46— How important, or not, are the following things for helping to grow New Zealand's relationship with Asia?

Base: All New Zealanders (n=2,334)

New Zealanders have mixed views on whether enough is being done to build understanding of Asia or New Zealanders' acceptance of cultural diversity.

Fifty-one percent of New Zealanders feel that the nation is accepting of cultural and religious diversity, down seven percent from 2020. Forty-five percent of respondents feel either neutral (24 percent) or disagree (21 percent) that New Zealand is accepting of diversity (see figure 22).

New Zealanders also have a mixed view on whether enough is being done to increase New Zealanders' understanding of the religions, cultures and traditions of Asia. Just under a third of respondents (31 percent) agree that enough is being done, while close to another third (29 percent) neither agree nor disagree. Another third of New Zealanders (32

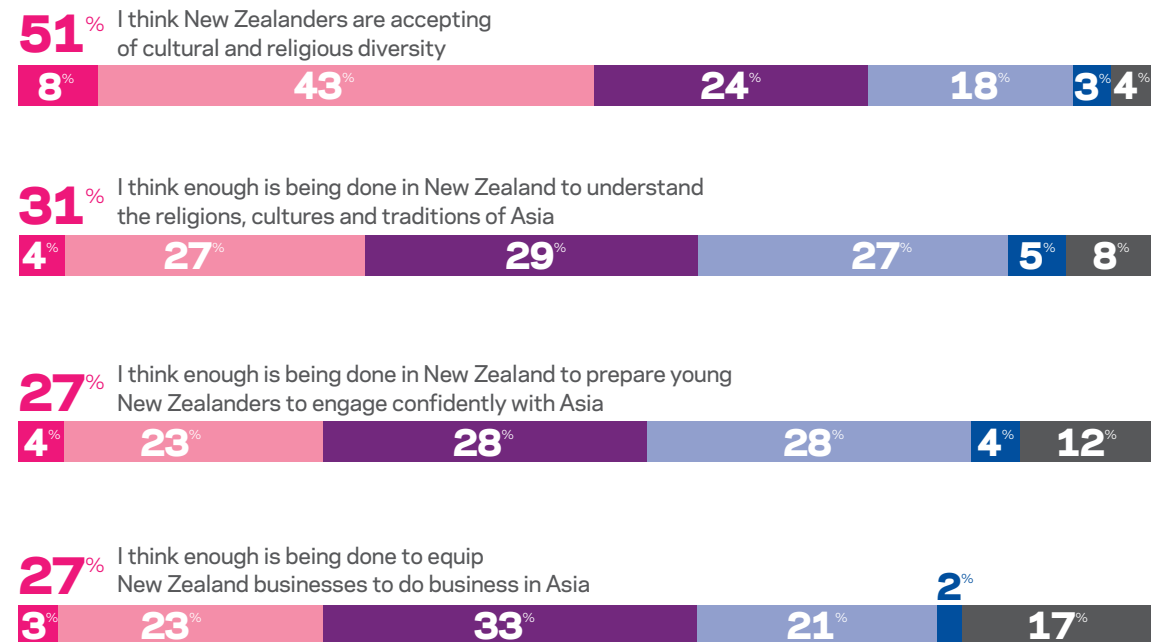
percent) disagree that enough is being done to lift the understanding of New Zealanders.

As in 2020, New Zealanders have similarly mixed views on whether enough is being done to equip New Zealand businesses to trade with Asia. Fewer New Zealanders feel enough is being done to prepare young New Zealanders to engage confidently with Asia - in 2021, 27 percent said enough was being done, compared to 29 percent in 2020.

Figure 22

Acceptance of diversity and views on building understanding of Asia

Percentage of people who at least 'agree' with the following statements



- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Don't know

Source: Q32 — From what you already know, how much do you agree or disagree with each of the following statements?

Base: All New Zealanders (n=2,334)

New Zealanders feel that learning Chinese (including Mandarin and Cantonese) would be useful for young New Zealanders.

In 2021, we asked New Zealanders which language they perceive as most useful for young New Zealanders to learn (excluding New Zealand's official languages of Te Reo Māori, English, and New Zealand Sign Language).

In response, a significant number (39 percent) indicated that Chinese languages would be the most useful for young New Zealanders to learn (see figure 23). A quarter of respondents (26 percent) said they were unsure which language would be most useful for young New Zealanders to learn.

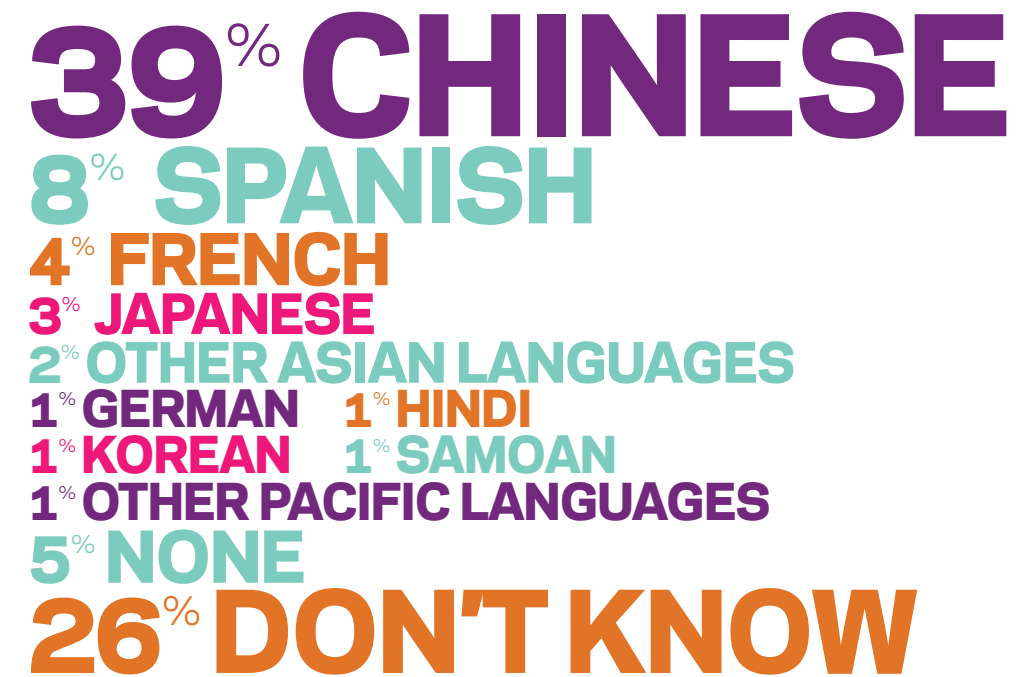
“I think for Kiwis, in order to get a job in China, they will need to speak a bit of Chinese... But China is different now though. When I was in intermediate, we started to learn English. Now, learning the subject of Chinese is more important than learning English in schools... If Kiwis have really good English, and some amount of Chinese, they will succeed well.”

Male, 38, Chinese, Auckland

Figure 23

What language would be most useful for young New Zealanders to learn?

*excluding New Zealand's official languages



Source: Q30 — Excluding New Zealand's official languages (English, Te Reo Māori and New Zealand Sign Language) what language do you think would be most useful for young New Zealanders to learn?

Base: All New Zealanders (n=2,334)

Understanding Asian cultural norms and protocols are seen as important for New Zealand's future workforce.

We asked New Zealanders about the importance of equipping New Zealand's future workforce with Asia-related skills and capabilities.

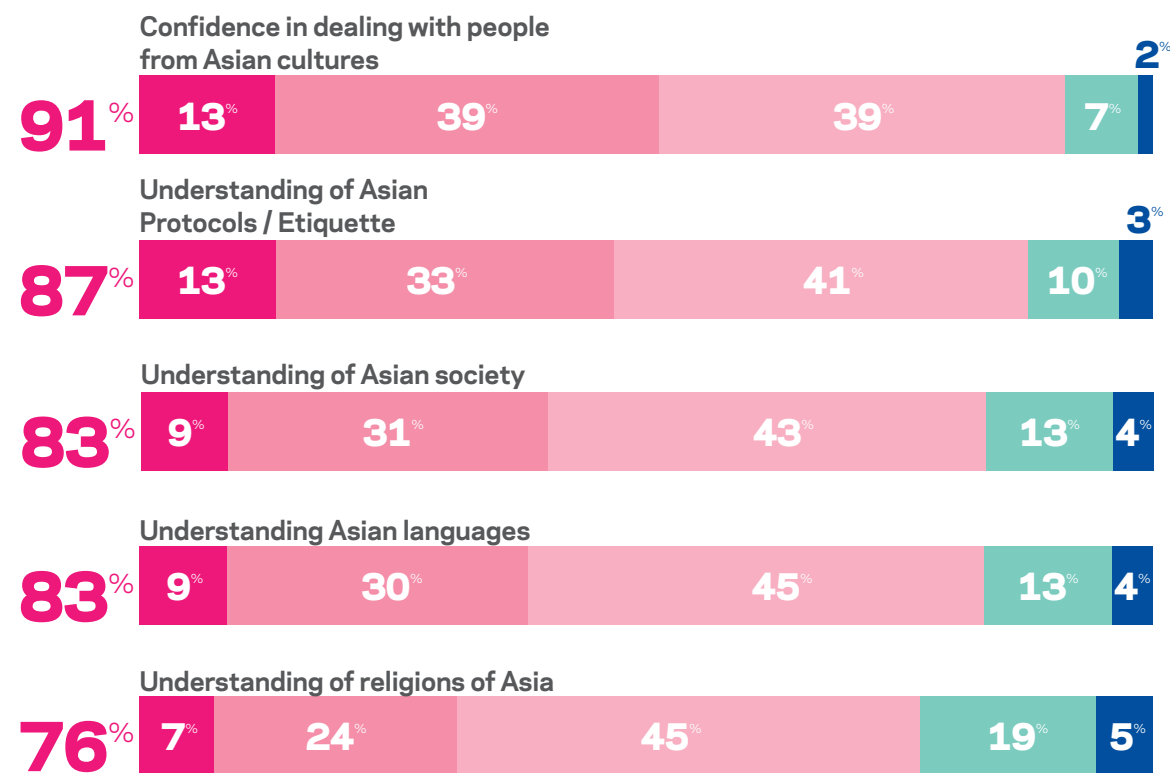
Confidence in engaging with people from Asian cultures and understanding Asian cultural norms and etiquette are rated as the top two Asia-related skills for New Zealand's future workforce. Ninety-one percent of New Zealanders feel that confidence in dealing with people from Asian cultures is at least 'somewhat important'. Eighty-seven percent of New Zealanders agree that understanding Asian cultural norms is also of importance for our future workforce.

Understanding Asian languages (84 percent) and the social context of Asian countries (77 percent) are also viewed as important career skills needed for New Zealand's future workforce.

"I would say language skills, depending on which countries you go to, even though they know English. But for you to be able to communicate at their level, [it's] better to know a little bit of their language."

Female, 44, Southeast Asian, Christchurch

Figure 24
How important is Asian cultural competency to our future workforce?



Very important (dark red), Important (red), Somewhat (light red), Not very important (teal), Not at all important (dark blue)

Source: Q13
Base: All New Zealanders (n=2,334)

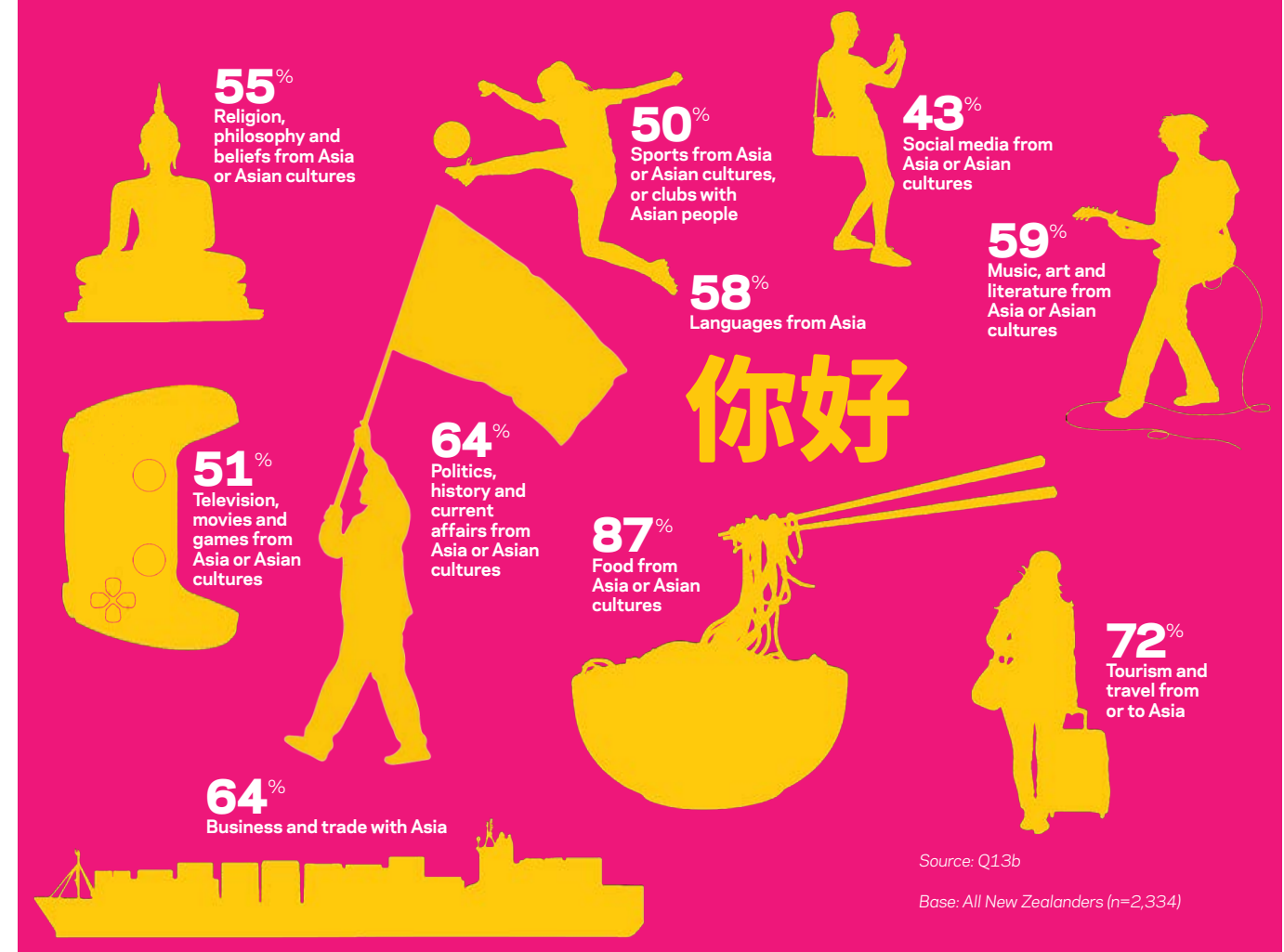
Interest in current affairs, music, and sport from Asia is growing, but food and travel remain the most popular interests.

New Zealanders have a growing set of Asia-related interests including music, art, literature, politics, history, and sport.

Fifty-nine percent of New Zealanders are at least 'somewhat interested' in music, art and literature from Asia compared to 48 percent in 2019. Half of New Zealanders (50 percent) now say they have an interest in sports from Asia or Asian cultures, up from 46 percent in 2020. Just over half of New Zealanders (51 percent) also say they are interested in television, movies and games from Asia.

As in 2020, food remains the top Asia-related interest for New Zealanders, with 87 percent reporting they enjoy Asian cuisines. New Zealanders also generally remain interested in travel and tourism in Asia, with 72 percent interested in visiting Asia (down from 74 percent in 2020).

Figure 25
What Asia related interests do New Zealanders have?



Source: Q13b
Base: All New Zealanders (n=2,334)

“You can’t understand someone’s culture unless you understand the language. Having lived in quite a few different countries and learned different languages, to really understand the people you need to understand the language.”

Male, 56, NZ European, Waikato

HOW DOES MEDIA AND ENTERTAINMENT CONSUMPTION INFLUENCE OUR PERCEPTIONS OF ASIA?

This section looks at the media sources and headlines shaping New Zealanders’ perceptions and knowledge of Asia.

It also examines entertainment and cultural consumption trends, and the impact of the 2020 Tokyo Olympics on New Zealanders’ views of Japan.



Key findings



Fewer New Zealanders recall having consumed Asia-related news in 2021 than 2020.

Half of New Zealanders consider New Zealand media reporting on Asia to be balanced.

However, more respondents feel that reporting on Asia is too negative than was the case in 2020.

Pop culture is becoming an increasingly important source of Asia-related content.

Facebook is the social media platform that makes New Zealanders feel the most connected to the world.

Younger New Zealanders feel more connected through social media platforms that support visual content and have large user bases, such as Instagram and TikTok.

Squid Game was the most consumed piece of Asia-related entertainment by New Zealanders.

Sixty-two percent of New Zealanders feel Asia-related entertainment is important for growing New Zealand's interest in Asia.

Hosting the Summer Olympics has had an overall positive impact on New Zealanders' perceptions of Japan.

Less Asia-related news was consumed in 2021, although coverage is considered balanced.

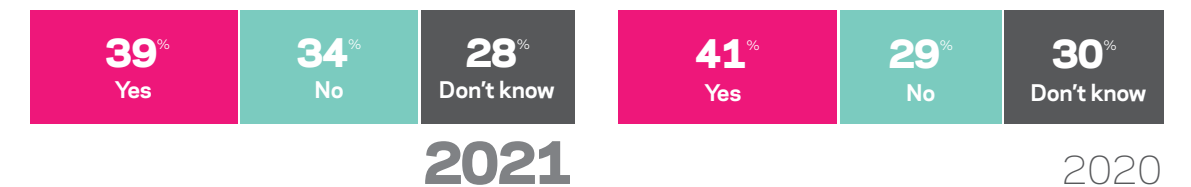
In 2021, 39 percent of New Zealanders recalled having seen, read or heard anything Asia-related in the news and media over the three months prior to the survey, down slightly from 41 percent in the 2020 survey (see figure 26).

Half of New Zealanders (50 percent) feel that coverage of Asia-related events in the media is balanced and fair (see figure 28). Around a quarter of New Zealanders (24 percent) are of the view that coverage of Asia in the New Zealand media can be too negative at times, an increase of four percent from 2020.

Figure 26

What information about Asia are New Zealanders receiving?

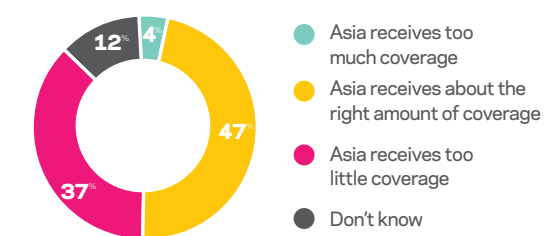
Have you seen, heard, or read anything about Asia-related events, issues or people in the last three months?



Source: Q26a
Base: 2021 (n=2,334), 2020 (n=2,001).

Figure 27

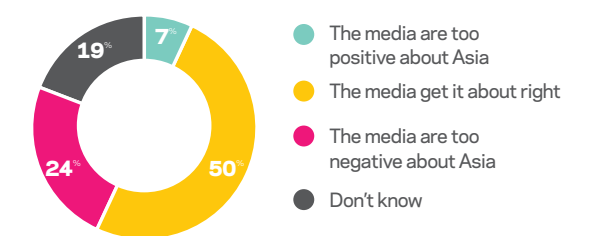
Asia coverage in New Zealand media



Q36 - Does Asia receive too much or too little coverage in New Zealand media? Base: All who have seen something about Asia in the news in the last three months (n=895)

Figure 28

Sentiment of Asian coverage in New Zealand media



Q37 - Which of the following best describes your view of how the New Zealand media portrays Asia? Base: All who have seen something about Asia in the news in the last three months (n=895)

Traditional media is still popular, but digital media and popular culture are also relied upon as sources of information.

Traditional media continues to be the most common source of Asia-related news for New Zealanders (67 percent), a finding largely unchanged from 2020 (68 percent). Digital and social media are also major sources of Asia-related information for New Zealanders. In the three months prior to the survey period, 49 percent of New Zealanders report accessing websites for Asia-related information and 39 percent report accessing social media for such information (see figure 29).

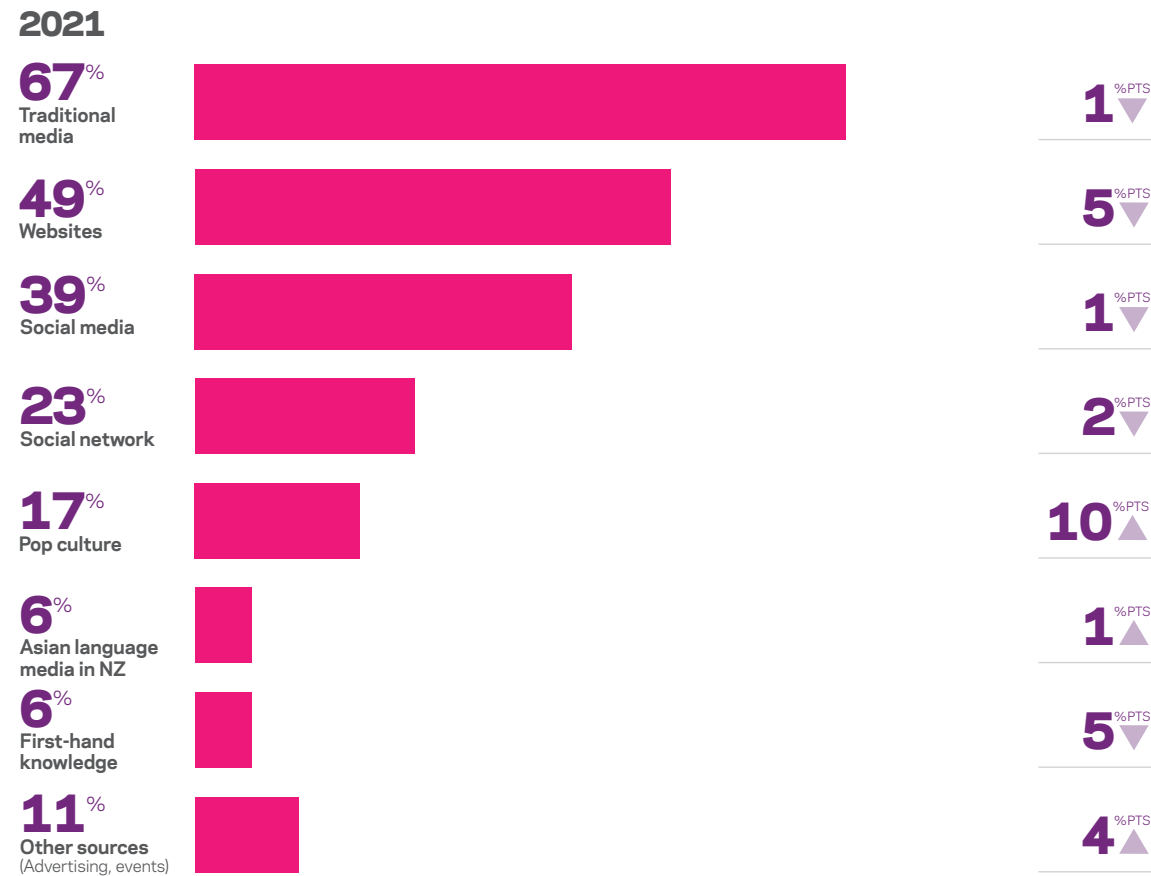
Popular culture has grown as a source of Asia-related news and information. In 2021, 17 percent report receiving Asia-related information from popular culture up from seven percent in 2020.

“Recently there’s been a lot of Asian TV series on Netflix that have gotten quite popular. It’s given people awareness about what’s happening around the world, and in Asia in particular.”

Male, 28, Filipino, Auckland

Figure 29

Where have people received most of their Asia-related information?



Source: Q26b — From what news or media sources have you received most of your information about Asia-related events, issues or people in the last three months?

Base: New Zealanders seen/heard Asia-related information past 3 months (n=895)

New Zealanders use a range of social media platforms to connect them to the world.

In 2021, we asked New Zealanders which social media platforms make them feel most connected to the world. Fifty-seven percent of New Zealanders feel that Facebook connects them to the world, with YouTube (39 percent) and Instagram (30 percent) rounding off the top three most popular platforms overall (see figure 30).

New Zealanders under the age of 30 are more likely to feel connected through more typically visual platforms with a large number of users, including Instagram, TikTok, and Snapchat.

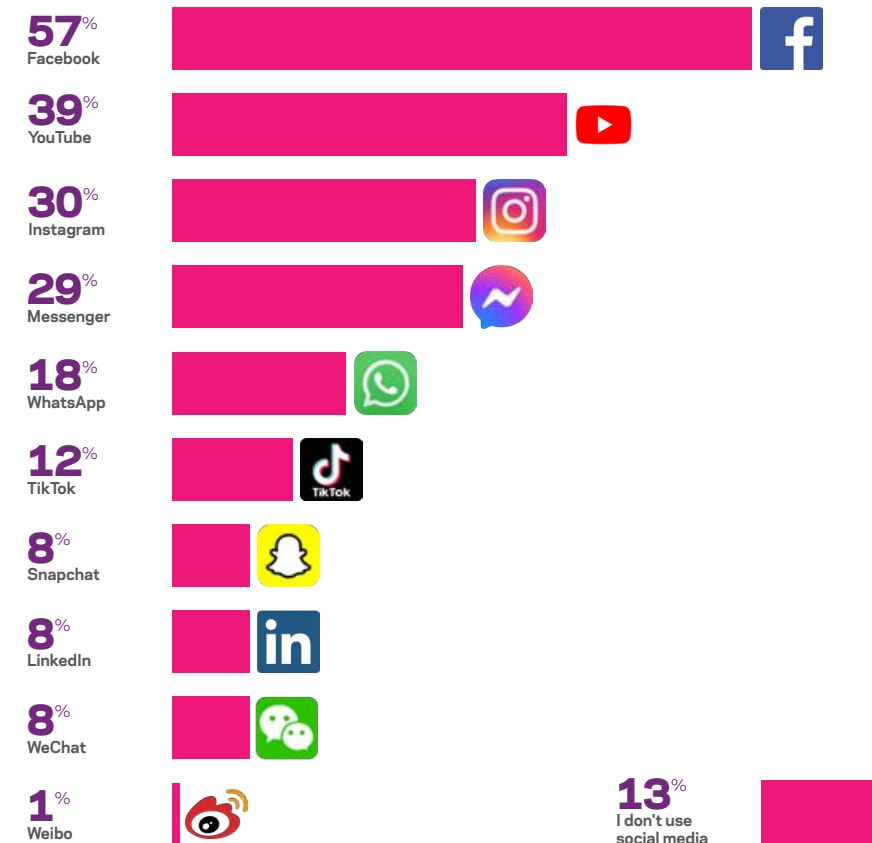
Older New Zealanders, by contrast, feel more connected on platforms that help them reach their own personal networks, such as Facebook, WhatsApp, and LinkedIn.

“I watch on YouTube the CCTV news ... it’s like web TV, but it’s broadcasting live from China ... I value my position living in New Zealand, where I can get the story from both sides.”

Male, 38, Chinese, Auckland

Figure 30

Social media platforms that connect us globally



Source: Q49 — Which of the following social media platform(s) makes you feel most connected to the world?

Base: All New Zealanders (n=2,334)

Two thirds of New Zealanders consume Asia-related entertainment*

A growing number of New Zealanders watch, play, or listen to Asia-related entertainment on at least an annual basis. Two-thirds of New Zealanders (65 percent) consumed Asia-related entertainment in 2021 (see figure 31), up from 59 percent in 2020. Furthermore, 35 percent of New Zealanders are consuming Asia-related entertainment on at least a monthly basis, up from 29 percent in 2020.

Asian New Zealanders are more likely to consume Asia-related entertainment, with 46 percent stating that they are weekly consumers.

* 'Asia-related entertainment' can include content about Asia or Asian peoples; content set in or produced in Asia; or content produced by people self-identifying as being of Asian ethnicity. Content may come in a variety of forms (e.g. film, television, streaming services, music, gaming, and social media etc).

Most New Zealanders feel that Asia-related arts and entertainment are important for growing New Zealanders' interest in Asia.

Sixty-two percent of New Zealanders are of the view that Asia-related arts and entertainment are at least 'fairly important' for growing New Zealanders' interest in Asia (see figure 32). One in five (20 percent) say it is 'very' or 'extremely' important for growing interest in Asia. Conversely, just one quarter (24 percent) feel that Asia-related arts and entertainment are not important for growing interest in Asia.

Interest levels in Japan have increased for many New Zealanders following the 2020 Tokyo Summer Olympics.

Thirty-seven percent of New Zealanders say that they are more interested in learning about Japan as a result of Japan's hosting of the Summer Olympic Games.

Younger New Zealanders (under 30) are more likely to be interested in learning about Japan as a result of the Olympics (45 percent) than those aged 30 and over (34 percent).

The 2020 Tokyo Summer Olympics has had a net positive impact on New Zealanders' perceptions of Japan.

In 2021, we asked New Zealanders how the 2020 Olympics had impacted their views of Japan. For most New Zealanders (57 percent) their view remained unchanged. However, 33 percent said that Japan's hosting of the Games positively impacted their perceptions of Japan.

Squid Game was named the most consumed Asia-related entertainment by New Zealanders in 2021.

For the first time, we asked New Zealanders who consume Asia-related entertainment on at least a monthly basis what kinds of television, movies, music, or gaming content they have consumed recently. Across all respondents, the most common response was the South Korean production Squid Games (Netflix) with 19 percent of respondents recalling they had streamed the series. New Zealanders also recalled watching or listening to Asia-related films (19 percent), television shows (18 percent), 'K Pop' (nine percent), and anime (seven percent).

"I remember having friends in high school who were into [K-Pop]. It was always the ones who didn't speak the language who loved K-Pop the most, which was pretty cool. Now, you hear K-Pop groups like BTS on the radio, they're getting really big here."

Female, 24, Malaysian, Auckland

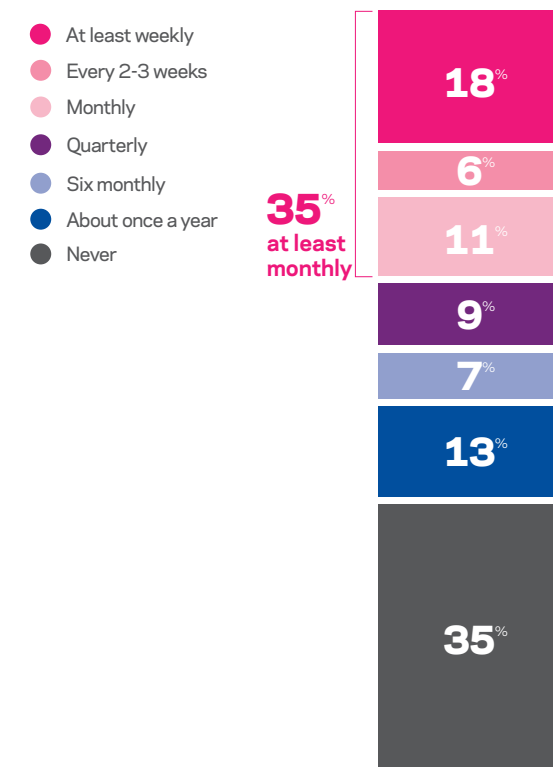
"[Anime] has been really popular, my older children are really drawn to it and enjoy it, more so than when they were younger... A lot of their friends watch it as well. I've heard them have big discussions with their groups of friends [about it]. It seems like their age group are very interested in it, from 16 [years old] down to 10 and 11 [years old]."

Female, 43, Pasifika/Māori/NZ European, Waikato

Figure 31

Asia-related entertainment consumption

Frequency of consuming Asia-related entertainment



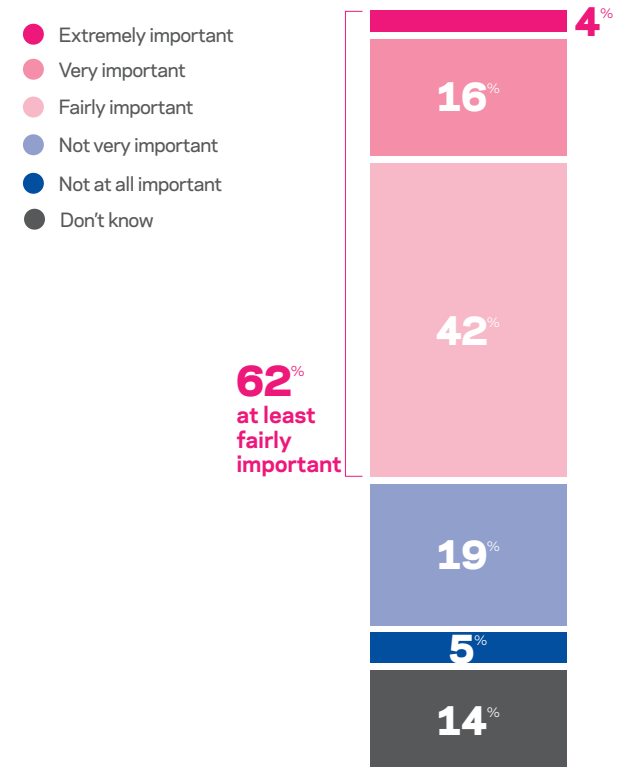
Q38 — How often do you watch, play, or listen to Asia-related entertainment?

Base: All New Zealanders (n=2,334)

Figure 32

Are arts and entertainment important for growing interest in Asia?

Importance of Asia-related arts and for growing interest



Q39a — How important do you think Asia-related arts and entertainment is for growing New Zealanders interest in Asia?

Base: All New Zealanders (n=2,334)

The next generation

3



“I didn’t [learn much about Asia] when I went to school. I think it would be great to have more of a diverse view of Asia, rather than the [big] names that pop out. But I do think that needs to be balanced with learning the history of New Zealand as well, because that’s something which we didn’t do particularly well when I was at school either. There’s definitely space for it, just mindful that there’s a finite amount of learning that can happen at school. Ideally you’d be able to do a deep dive into all cultures, as well as ours.”

Male, 31, Māori/NZ European, Auckland

THE NEXT GENERATION: INSIGHTS AND ASPIRATIONS OF YOUNG NEW ZEALANDERS



Young New Zealanders and Asia

In January 2022, the Asia New Zealand Foundation commissioned a survey into the attitudes and perceptions of school leavers (aged 16 to 19). As *Perceptions of Asia* reached its 25th year, we wanted to ask the next generation for their views on New Zealand's relationship with Asia. We also wanted to gain their views on how they see their future, particularly in the light of border closures and other disruptions.

The research aimed to measure young people's views around studying about or in Asia, the New Zealand-Asia relationship and what interests them about the region. It also sought opinions on the impact of the pandemic and about New Zealand's international priorities and goals.

An overview of the sample composition and survey methodology used for the survey is found on page 76.

Youth knowledge of Asia

The results of the survey point to the fact that Asia is not an immediate point of focus for young people. Their natural inclination is to think about New Zealand's association with the Pacific and Australia, as well as the more global issue of climate change.

Detailed knowledge about Asia appears to be low and the extent of study about Asia in New Zealand schools limited. Covid-19 has also impacted on confidence about travelling in Asia. However, when young people's interest was piqued by the survey, this resulted in increased interest in learning to speak an Asian language, Asian studies at school or university, or studying or working in Asia. This suggests perceptions of the importance of Asia might be mismatched in terms of learning opportunities.

Key findings

Asian studies in schools

Just over half of respondents (51 percent) viewed Asia as an important region to be taught about in schools. However, only 24 percent said Asia had been taught about 'to a reasonable extent'. Almost half (45 percent) indicated they had experienced some, but not a lot, of studies about Asia. Both the Pacific (70 percent) and Australia (65 percent) were seen as more important to learn about.

Learning an Asian language

A high number of respondents felt an Asian language would be useful for their careers. About two thirds (67 percent) were interested in learning an Asian language, compared to 13 percent who were not. Nineteen percent stated they didn't know. All age groups stated they were interested but interest was highest among respondents aged 19 years (83 percent) compared to those aged 16 years (55 percent).

International priorities

Growing the economy (65 percent) and co-operating with other countries on climate change (58 percent) were identified as New Zealand's key international priorities. Key goals for New Zealand to achieve by 2041 were to be:

- Carbon neutral and a global leader in combating climate change (47 percent)
- Secure and have avoided involvement in any conflicts in our region (47 percent)
- Considered a leader in the promotion of democracy, freedom and rights (44 percent)

Covid-19 impacts

Seventy-one percent of participants felt the Covid-19 pandemic would make it much harder and more expensive to travel to Asia. More than half (58 percent) felt the pandemic had made it less likely that young New Zealanders in their age group would want to work or study in Asia. Older respondents, aged 19 years, were more concerned about this (79 percent) and were also more hesitant about travelling outside of New Zealand in general.





Points of interest

Food (27 percent), and culture and history (24 percent) were most frequently cited as the most interesting aspects about Asia. However, areas of interest varied according to age. For instance, respondents aged 16 years were significantly more likely to state they were fascinated by Asian culture than respondents aged 19 years (40 percent and 13 percent respectively). Respondents aged 19 were more likely to be interested in Asia's scenery, buildings and sites than the youngest participants (39 percent compared to six percent). Business and technology and 'how futuristic' Asia is (3 percent) and K-pop and K-drama (two percent) also featured among responses.

Japan 'most interesting'

When asked the place in Asia of most interest to them, a significant number (42 percent) responded 'I don't know'. This may reflect limited opportunities to learn about Asia in schools. Japan was the country cited by most others as the most interesting Asian country (15 percent), followed by China (seven percent). Thailand, India, Singapore and Vietnam registered two percent each and Hong Kong and Indonesia one percent each. South Korea was also at one percent, despite the popularity of K-pop and K-media. Six percent 'preferred not to say' and one percent said no Asian countries were of interest to them.

Why Japan and China?

The main reasons given for interest in Japan or China were that the respondent originated from that country/had family connections, culture and history, and food and language. More young people expressed interest in China (27 percent) than Japan (17 percent) in terms of being a significant country and an important trade partner for New Zealand.

Working or studying in Asia

The survey results indicated good interest in working and/or studying in Asia. Fifty-eight percent were at least somewhat interested and 28 percent very interested. There were variations between age groups, with those aged 19 more interested (54 percent).

Asian studies in New Zealand

More than a third (38 percent) said they would be interested in completing Asian-related study at a New Zealand university or institute. Only 19 percent stated they were not interested. Others were neutral or didn't know. The level of interest differed by age group, with respondents of 19 years of age more interested (52 percent).

Pacific interest

A high number of respondents (70 percent) thought it was important for the South Pacific to be studied in schools, followed by Australasia (65 percent). This is in comparison to the 51 percent who identified Asia as an important region that should be taught about in New Zealand schools.

“I think of the bustling nightlife, the markets. You can eat at three or four in the morning if you want, there’s a lot of things open [late]. That’s the kind of difference that we don’t really have here in the same way.”

Male, 29, NZ European, Auckland

BACKGROUND, METHODOLOGY, AND SAMPLE PROFILES

The Asia New Zealand Foundation was established in 1994 with the objective of increasing New Zealanders’ understanding of, and strengthening their relationships with, the people and countries of Asia.



About the annual Perceptions of Asia survey

Since 1997 the Foundation has undertaken regular research to measure New Zealanders' perceptions of Asia. This is the only research undertaken by the Foundation that is focused on understanding New Zealanders' views of both the barriers to and benefits of a relationship with Asia.

The research helps inform the Foundation's policy direction, including identifying priorities for how the Foundation might work to foster stronger relationships with Asia and for better preparing New Zealanders to engage confidently in Asia.

The research has evolved over time, and includes questions covering:

- The perceived importance of Asia over time
- Views about the benefits to New Zealand of a relationship with Asia
- Perceptions of Asian peoples and cultures
- Perceived knowledge of Asia
- Perceptions of friendliness and threat
- Media perceptions and consumption
- Perceived involvement with Asian people and cultures
- Asia-related interests, including travel and attending relevant events
- Specific events of note in the region (e.g. APEC, Olympics).

Where possible, we have endeavoured to keep the questions largely unchanged year-on-year, to allow for a full range of comparisons between years to be made.

Results are rounded to the nearest one percent, meaning some totals (in each of the graphs) are just above or just below 100 percent.

Quantitative methodology

Two thousand and one online surveys were completed with New Zealanders aged 15 years and over from 9 - 29 November 2021. A survey of 2,334 people has a maximum margin of error of +/- 2.0 percentage points at the 95 percent confidence level.

Data collection method

As with 2020, respondents completed a 15-minute online self-completion survey. Before 2017, surveys were completed via telephone interviewing. The online survey approach allows for a slightly longer questionnaire and an expansion of the overall sample size. A larger sample enables more detailed demographic analysis, including the identification of patterns by, amongst other variables, age groups and ethnicity.

Sampling and weighting

Respondents were drawn from Kantar's online research panel - which contains more than 100,000 New Zealanders, recruited from both offline and online sources (including through their random telephone surveys, social media, advertising and the Fly Buys loyalty programme). Their panel meets or exceeds all of the 28 global best practice standards outlined by ESOMAR for panel development and management.

From the panel Kantar Public drew a sample which was representative by age, gender, location and household size. Final survey weighting ensured overall results represent the adult population on age, gender, and ethnicity. The weighted and unweighted sample profiles can be found in Appendix A.

Qualitative methodology

We conducted six two-hour mini groups (two to four participants in each) with New Zealanders across the country via Zoom. Our key audiences were Māori, Pasifika and Asian New Zealanders (including those with North, South and Southeast Asian heritage), aiming to provide a snapshot of the general population. Across all the participants, there were a range of ages, genders, socio-economic backgrounds and geographic locations, as well as differing knowledge levels of international relations, politics, news and trade. The full sample composition can be found in Appendix B.

The group conversations aimed to capture New Zealanders' perceptions of Asia and covered a range of topics, from geopolitics and trade to entertainment and popular culture. Using a semi-structured approach, the discussion guide allowed for a natural flow in conversation around key question areas and themes, allowing participants to freely share their thoughts, personal experiences and stories. Quotes from the participants are included throughout the report to support the quantitative findings.

Fieldwork took place between 16 February and 9 March 2022.

Contextual factors:

- New Zealand at Alert Level Red, Covid-19 Omicron response
- Beginning of the Russian invasion of Ukraine

Other notes

- Within the body of this report, subgroup analyses are included to add clarity to the results. Sub-analyses include cross-tabulations with demographic variables, such as gender, age, ethnicity and region. Reported differences are statistically significant at the 95 percent confidence level, unless otherwise specified.
- The project also included follow-up qualitative research to further explore some of the results of the quantitative survey. The qualitative research was carried out through four focus groups. Details of the qualitative research are outlined below.
- Throughout this report 'New Zealanders' refers to all those aged 15 and above, living in permanent private residences in New Zealand, including those who were born in New Zealand and those who were born elsewhere.

Comparison from previous surveys

In this year's report we have provided some comparisons between the 2020 and 2021 survey results, to show the changing trends in New Zealanders' perceptions of Asia over time.

Focus on region

Throughout this report we highlight the views and experiences of people across the different regions of New Zealand.

Sub-group differences

Throughout this report, only statistically significant differences at the 95 percent confidence level between sub-groups of the survey populations are presented, unless otherwise specified.

Appendix A: Quantitative survey sample profile

Gender and age

Gender	Unweighted percent (n=2,334)	Weighted percent (n=2,334)
Male	49	49
Female	51	51
Gender diverse	-	-

Age	Unweighted percent (n=2,334)	Weighted percent (n=2,334)
15-17 years	5	7
18-34 years	28	32
35-49 years	23	19
50-59 years	16	13
60-69 years	15	15
70+	13	13

Ethnic identification

	Unweighted percent (n=2,334)	Weighted percent (n=2,334)
New Zealand European	66	68
New Zealand Māori	20	14
Pacific People	7	8
Asian New Zealander	18	18
- Chinese	6	6
- Indian	6	6
- Other Asian ethnicity	6	6
Other	6	6

Region

	Unweighted percent (n=2,334)	Weighted percent (n=2,334)
Northland	4	4
Auckland	28	33
Waikato	8	10
Bay of Plenty	7	7
Gisborne	1	1
Hawke's Bay	4	4
Taranaki	4	3
Manawatū-Whanganui	5	5
Wellington	9	11
Tasman	1	1
Nelson	2	1
Marlborough	1	1
West Coast	4	1
Canterbury	11	13
Otago	5	5
Southland	4	2

Location

	Unweighted percent (n=2,334)	Weighted percent (n=2,334)
Big city	43	48
Provincial city or large town	30	29
Small town	17	14
Rural area or farm	10	9

Highest education level

	Unweighted percent (n=2,334)	Weighted percent (n=2,334)
Primary/Intermediate school	1	1
Secondary school	25	25
Vocational or trade qualification	24	23
University degree	32	33
Postgraduate degree	13	13
Prefer not to answer	4	4

Appendix B: Qualitative sample composition

Sample Composition:

The tables below show the sample composition of the participants who took part in the six group discussions:

Age

18-29 years	6
30-39 years	4
40-49 years	4
50+ years	5

Gender

Female	9
Male	10

Ethnic identification

New Zealand European/ Pākehā	7
New Zealand Māori	4
Asian	6
Pasifika	2

Region

Auckland	8
Wellington	3
Waikato	3
Canterbury	2
Otago	1
Nelson	1
Northland	1

Knowledge of international politics and relations

Almost nothing	5
A fair amount	11
A lot	3

Knowledge of international news

Almost nothing	2
A fair amount	13
A lot	4

Knowledge of international trade and investment

Almost nothing	8
A fair amount	10
A lot	1

Appendix C:

Methodology of 'The Next Generation: Insights and Aspirations of Young New Zealanders survey'

Asia New Zealand Foundation commissioned Research New Zealand to undertake the Young New Zealanders and Asia survey. The online survey was completed with 563 young New Zealanders, aged 16-19 inclusive between 19 and 30 January 2022. The achieved sample was checked for its representativeness and weighted accordingly.

Specific questions were included in the survey in order to measure young people's: 1. Interest in studying about Asia, learning to speak an Asian language, working or studying in Asia. 2. Opinions about the extent to which Asia should be a subject topic in New Zealand schools relative to other places or regions. 3. Opinions about the places in Asia that are of the most interest to them. 4. Opinions about the 'closeness' of Asia's 'association with New Zealand'.

These were in addition to other questions which measured young people's: 1. Opinions about what should be New Zealand's international priorities. 2. Opinions about what goals New Zealand should set out to achieve by 2041 (e.g. New Zealand should be carbon neutral and a leader in climate change; a leader in the promotion of democracy). 3. Opinions about the impact of the Covid-19 pandemic.

The results of the survey differed by key demographic variables. The most pronounced differences in relation to the results for Asia were in age, however there were also differences recorded in terms of New Zealand's future goals and international priorities by gender.



ABOUT THE ASIA NEW ZEALAND FOUNDATION TE WHĪTAU TŪHONO

The Asia New Zealand Foundation Te Whītau Tūhono is New Zealand's leading non-partisan, non-profit authority on Asia. We were set up in 1994 to build New Zealanders' knowledge and understanding of Asia.

We provide experiences and resources to help New Zealanders build their knowledge, skills, connections and confidence to thrive in Asia. We work in partnership with influential individuals and organisations in New Zealand and Asia to provide high-level forums, cultural events, international collaborations, school programmes and professional development opportunities.

Our activities cover more than 20 countries in Asia and are delivered through programmes with a focus on arts, leadership, entrepreneurship, sports, business, media, education, research and informal diplomacy (Track II).

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