



New Zealanders' Perceptions of Asia and Asian Peoples

2017 Annual Survey

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Comment from the Executive Director



This year's *Perceptions of Asia* survey has made for sobering reading. We learned last year that eight of out 10 New Zealanders thought Asia was important to New Zealand in economic, social and cultural terms - but two-thirds of us said we knew little or nothing about Asia.

At the Foundation, we thought this was probably a question of confidence - that New Zealanders just weren't backing ourselves in what we knew about Asia.

This year's data tells us that this simply isn't the case. If anything, New Zealanders are overstating what they know about Asia. When asked six general knowledge questions about Asia, only 13 percent achieved a pass mark.

What worries us at the Foundation is that young people have a particularly low knowledge of Asia. Fifty-two percent of people aged under 30 did not provide any correct answers, or only provided one correct answer.

This lack of youth knowledge doesn't surprise us. Our research into school leavers last year showed us that only eight percent of Year 12 and 13 students were 'Asia-ready'. Only four in 10 saw Asia-related skills as being relevant for our future workforce.

This all suggests we have our work cut out if we are looking to raise 'global citizens'. This matters, hugely, for all sorts of reasons.

In 20 years' time, around 60 percent of the world's middle class will be in Asia. Our business community tells us that they need a workforce that is 'Asia-capable'. However, this message isn't getting through to young people looking to make decisions about their future career pathways. Through our '#ThinkAsia' programme, the Foundation is working with partners to proactively address this deficit.

But it goes wider than that - it is about New Zealanders having the confidence, skills and knowledge to engage meaningfully with Asia, both domestically and offshore.

So much has changed in New Zealand and globally since this survey began 20 years ago. Our changing demography is an obvious shift. What New Zealanders think and feel about Asia has a very real influence on our engagement with the region and with people who identify as Asian.

I think this year's data emphatically shows it's time to get real - we need to disabuse ourselves of the notion that New Zealanders are 'Asia-savvy'.

There are some reasons to be hopeful, however.

The data tells us more than half of us are travelling to Asia - and that this travel is strongly associated with greater Asia-related knowledge and confidence. More than four in 10 of us have 'a lot or a fair amount' to do with Asian cultures or with people who identify as Asian - this is another key predictor of knowledge.

And then there's our bellies - more than seven in 10 New Zealanders are interested in Asian food and cuisine.

The Foundation continues to work in a positive and collaborative way to grow New Zealanders' confidence and knowledge of Asia. Much of this is experiential, based on data which shows that travel, food and personal interactions all make a positive difference.

Finally, this survey is part one of a two-part story. Later this year we'll be publishing research on *Perceptions of Asia* and *Asian Peoples* in Te Ao Māori. We think this deserves more focus and we're looking forward to the conversations around these important findings.

Simon J Draper

Asia New Zealand Foundation

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Our Approach

The Asia New Zealand Foundation has been surveying New Zealanders' perceptions of Asia and Asian peoples for more than two decades. The 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 2,000 New Zealanders aged 15 years and over conducted during late November and early December 2017. The results have been weighted so they are representative of New Zealanders by key demographics such as age, gender, ethnicity and location.

Since this research started 20 years ago, New Zealand has experienced a number of demographic changes. One prominent feature of change has been a growth in the population identifying with an Asian ethnicity (which is projected to be 15 percent of the population in 2018, compared with 6 percent in 2001). There has also been a growth, although to a lesser extent, in the number of people identifying with a Māori or Pacific ethnic identity.

Do New Zealanders know much about Asia?

This report has a special focus on 'Asia-related knowledge'. We know from last year's survey that two-thirds of New Zealanders said they knew little or nothing about Asia. Was this true, or was it more an issue of New Zealanders lacking self-confidence in their knowledge about Asia? This year, for the first time, we asked survey respondents to complete a six-question knowledge test which included economic, social and political questions about the Asia region. The results do point to a knowledge deficit. They also show a positive correlation between knowledge of Asia and perceptions - namely, the more we know about Asia, the more positive we tend to be about Asian countries and impact of Asia on New Zealand.

The results also demonstrate that New Zealanders who have greater knowledge about Asia tend to think more needs to be done to prepare New Zealanders for engaging with the region. This comes off the back of the Foundation's 2016 survey of school leavers, *Losing Momentum*, which found only 8 percent of Year 12 and 13 students were 'Asia-ready'.

See full report here:

<http://www.asianz.org.nz/reports/report/school-leavers-asia-engagement-2016/school-leavers-asia-engagement-2016/>

Focus on youth

Throughout this report we highlight the views and experiences of young people (aged under 30), who are a key target group for the Foundation. As was shown in *Losing Momentum*, this survey's findings suggest young people do not necessarily appreciate the importance of Asia-related skills even though they will be the group most affected by the growing influence of Asia in the 21st Century. Further targeted research may be required to explore the views of young people in more depth.

Changing methodology

Conscious of the value of a longitudinal data set, two particular methodological changes were made to the 2017 survey - the introduction of focus groups and an online survey method. The changes mean we are not always comparing like with like when looking at earlier data.

A survey can only provide a high-level picture of trends and patterns. Wherever possible we complement survey results with findings from four focus groups which explored knowledge and attitude in more detail. Illustrative quotes from the focus groups are used throughout the report and provide the 'human context' behind some of the key survey statistics. We deliberately recruited

people with both strong and weak engagement with Asia to take part in the focus groups. This involved recruiting two groups with high self-assessed knowledge and high personal involvement with Asian people/cultures, and two groups where knowledge and involvement were low. This provides rich context about the various influences upon perceptions. Of course, the quoted views of participants are not necessarily representative of all New Zealanders.

In 2017, the Foundation commissioned an online survey, whereas previous *Perceptions of Asia* surveys had been conducted by telephone. The change in survey method meant we could increase the range and type of questions asked, enabling a new set of general knowledge questions. It also allowed an increase in the overall sample size, enabling detailed demographic analysis, including the identification of patterns by age group. However, the change in method, along with a new set of questions, means there is only a limited ability to compare this survey with previous *Perceptions of Asia* surveys. Where relevant, the report provides a comparison against historic results. Our commentary includes caveats to consider when making these comparisons.

Please note that in some places in the report two answers are combined into one - for example, the answers 'somewhat important' and 'very important' are often merged to provide a combined 'important' answer. When this happens the combined answer may not add up to the sum of its parts because of rounding.

Context for the survey

The following topics, issues and media reports occurred around the time of the survey fieldwork and may have contributed to New Zealanders' perceptions:

- Attendance by newly elected Prime Minister Jacinda Ardern and Foreign Minister Winston Peters at a series of regional leaders' meetings in Asia (APEC and the East Asia Summit), with Trade Minister David Parker also concluding negotiations towards a Comprehensive and Progressive Trans Pacific Partnership (CPTPP);
- An announcement by the Prime Minister of a 'foreign speculators house ban', with legislation introduced into Parliament;
- Media coverage of allegations of Chinese political influence in New Zealand;
- Condemnation by the Foreign Minister of Japan's decision to continue whaling in the Southern Ocean;
- On-going coverage of the Rakhine crisis in Myanmar;
- Escalating tensions between North Korea and the United States, including New Zealand condemnation of the launch of an intercontinental ballistic missile by North Korea;
- Announcement by the Government of an independent stocktake of the housing crisis.



How knowledgeable are New Zealanders about Asia?

This section draws upon the survey results to measure New Zealanders' knowledge of Asia (both self-assessed knowledge and actual knowledge). The analysis identifies groups of the population with relatively high and relatively low Asia-related knowledge, as well as relatively high and relatively low confidence in their knowledge. Finally, this section also explores the relationship between knowledge and perceptions of Asia¹.



Key findings



New Zealanders continue to have relatively low levels of self-assessed knowledge about Asia. Around four in 10 said they knew at least a fair amount about Asia. This is lower than self-assessed knowledge of Australia, Europe, North America and the South Pacific.

The results from a general knowledge test about Asia reveal **New Zealanders' actual knowledge of Asia is even lower than their self-assessed knowledge.** When asked six general knowledge questions about Asia, only 13 percent provided at least four correct answers.

Those with personal connections to Asia or Asian culture have higher knowledge. For example, 24 percent of those who speak an Asian language provided at least four correct answers.

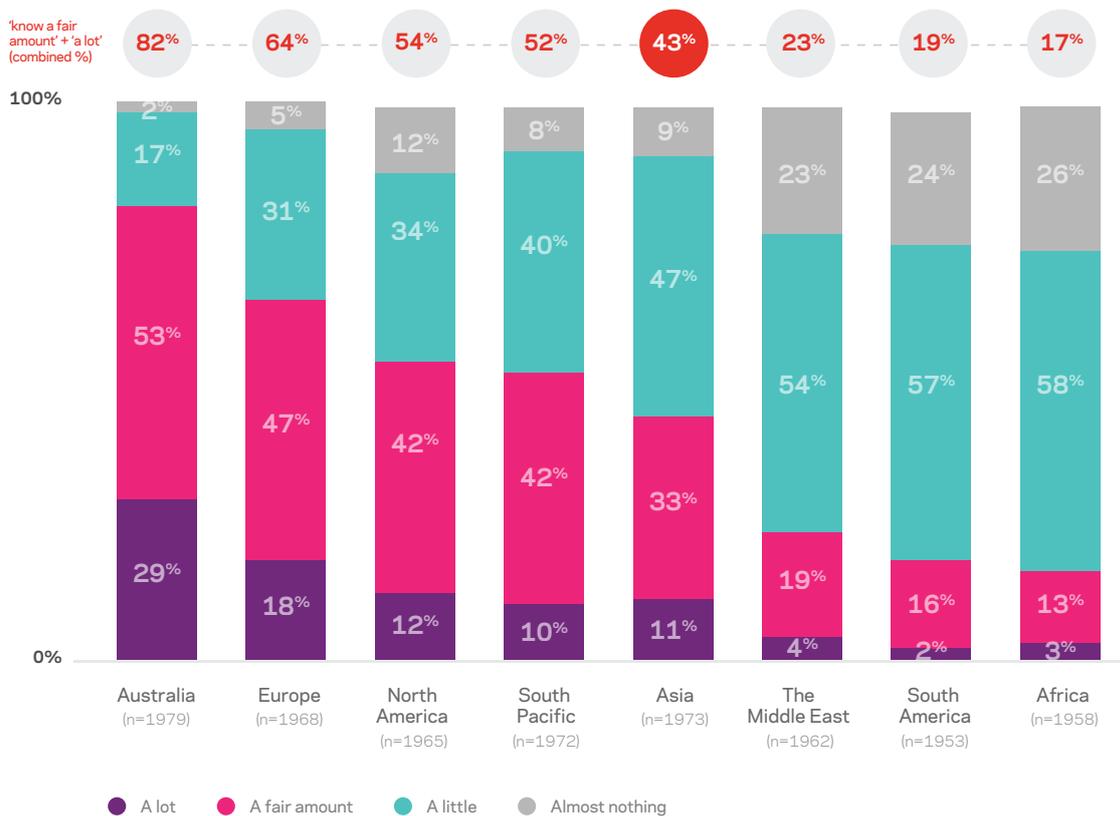
Young people have particularly low knowledge of Asia. Fifty-two percent of people aged under 30 did not provide any correct answers or only provided one correct answer - this compares with 35 percent of people aged 30 and over.

Involvement with Asian culture or with people who identify as Asian is associated with being confident and knowledgeable about Asia. Almost two-thirds of those with high self-assessed knowledge and high actual knowledge were involved with Asian people/cultures.

There is a strong connection between Asia-related knowledge and:

- a) a positive outlook about Asian countries;
- and
- b) positive perceptions about the long-term impacts of Asia on New Zealand.

Figure 1
How much would you say you know about each of the following regions or countries?



(n= number of respondents)
Source: Q1b - How much do you feel you know about the following regions?
Base: All New Zealanders, excluding those who said 'don't know'.

Self-assessed knowledge of Asia is relatively low

Around four in 10 reported they had at least a fair amount of knowledge about Asia. However, as Fig.1 (above) shows, this is lower than self-assessed knowledge of Australia, Europe, North America and the South Pacific. This pattern of lower knowledge for Asia than for other regions mirrors findings from previous *Perceptions of Asia* surveys²).

1 Please note that because this section is all about measurement of knowledge, no information from the focus groups is included.
2 In 2016, the proportions that knew a lot or a fair amount about Australia was 77 percent, Europe was 57 percent, North America was 43 percent, the South Pacific was 42 percent and Asia was 35 percent. Please note that due to a change in methodology all proportions were lower in 2016 compared with 2017 - this may relate to the 'recency effect' whereby a respondent in a telephone interview is slightly more likely to respond with the last response in a list (compared with a self-completion methodology).

Self-assessed knowledge of South Asia is particularly low

Self-assessed knowledge of particular regions within Asia was even lower than self-assessed knowledge of the region as a whole. As Fig.3 (right) shows, self-assessed knowledge of North Asia was the highest. Four out of 10 said they knew at least a fair amount about North Asia – this compares with three in 10 for South East Asia and only two in 10 for South Asia.

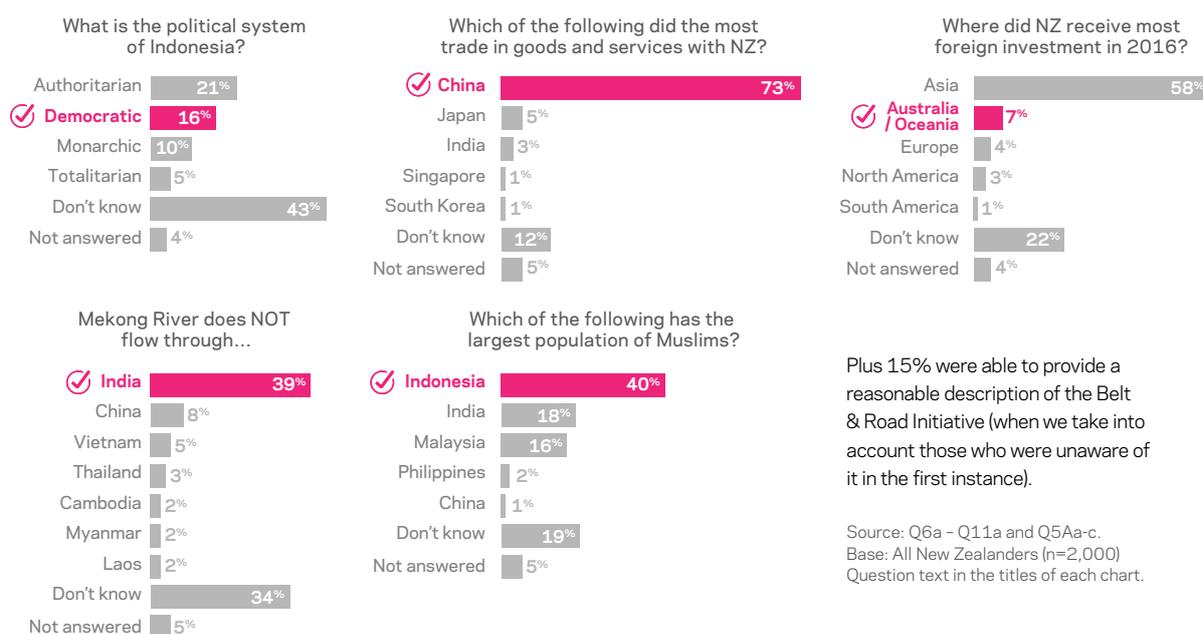
The results from a general knowledge test about Asia suggests 'actual' knowledge of Asia is lower than self-assessed knowledge

Previous *Perceptions of Asia* surveys only explored self-assessed knowledge – which may not reflect true underlying knowledge. This year survey respondents were asked to complete a knowledge test which included economic, social and political questions about Asia.

Fig.2 (below) shows the proportion of respondents answering the questions correctly.

- 73 percent correctly identified that New Zealand did most of its trade in goods and services with China in 2016.
- 40 percent correctly identified that Indonesia was the Asian country with the largest population of Muslims.
- 39 percent correctly identified that the Mekong River did not flow through India.
- 16 percent correctly identified that democracy was the political system of Indonesia.
- 15 percent were able to provide a reasonable description³ of the Belt and Road Initiative.
- Only 7 percent correctly identified that New Zealand received most foreign investment from Australia/Oceania in 2016.

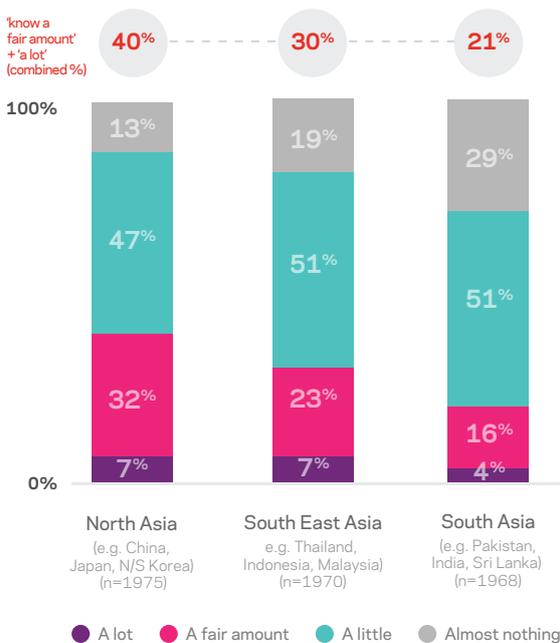
Figure 2
General knowledge question results (Correct answer marked in pink)



Source: Q6a – Q11a and Q5Aa-c.
Base: All New Zealanders (n=2,000)
Question text in the titles of each chart.

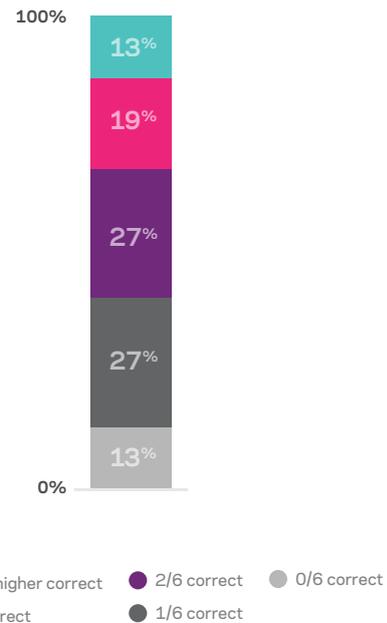
3 Please note that a 'low bar' was established for identifying 'a correct answer'. Respondents were asked to describe the Initiative using their own words. If they provided a short answer which included a 'trade', 'Chinese', or 'infrastructure' initiative then Colmar Brunton marked their answer as 'correct'.

Figure 3
How much would you say you know about each of the following parts of Asia?



(n= number of respondents)
Source: Q1c - And how much do you feel you know about each of the following parts of Asia?
Base: All New Zealanders, excluding those who said 'don't know'.

Figure 4
Scores (out of six) from a general knowledge test



Source: Q5a - Q11a - refer to Appendix A for question wording
Base: All New Zealanders (n=2,000)

The average survey respondent provided correct answers to only two of these questions.

Fig.4 (above) shows only 13 percent provided four or more correct answers – we define these respondents as having 'high knowledge' of Asia. Just under half provided two or three correct answers and four in ten did not provide any correct answers, or only provided one correct answer.

Fig.2 (left) provides the detailed results from the knowledge test⁴. It reveals some interesting findings about Asia-related knowledge, such as:

- The majority of New Zealanders incorrectly assume most foreign investment to

New Zealand comes from Asia (58 percent assume this).

- More New Zealanders think Indonesia is authoritarian (21 percent) than think it is democratic (16 percent) – however, the most common answer to this question was 'don't know' (43 percent).
- Although 35 percent say they have heard of the Belt and Road Initiative, only 15 percent of New Zealanders can provide at least a basic description of its purpose (answers are described in more detail later in the report – see page 42).
- A high proportion said 'don't know' to the questions (for example, 43 percent said 'don't know' to the question about the political system of Indonesia).

4 The question wording and detailed analysis of the answers are included in the Figure – please note that almost all questions were 'multi-choice'.

Those with personal connections to Asia have the highest knowledge

Overall, 13 percent of people provided four or more correct answers in the knowledge test. This group are labelled as having 'high Asia-related knowledge' elsewhere in the report.

Some sub-populations, particularly those with personal connections to Asia, were significantly more likely to provide four or more correct answers:

- Those who speak an Asian language (24 percent).
- Those who identify with an Asian ethnicity (22 percent).
- Those who were born outside New Zealand (22 percent).
- Those who say they are involved with Asian cultures or with people who identify as Asian (21 percent).
- Those with a degree qualification (20 percent).
- Those who have travelled to Asia (19 percent).

Young people have particularly low knowledge of Asia

Overall, 40 percent did not provide any correct answers in the knowledge test, or only provided one correct answer. This group are labelled as having 'low Asia-related knowledge' elsewhere in the report.

Young people, and some other groups of the population, were more likely to be in this 'low knowledge' category:

- 52 percent of young people aged under 30 provided no correct answers or only one correct answer - this compares with 35 percent of people aged 30 and over. Low knowledge was particularly common among young females (60 percent compared with 45 percent of young males).
- People in the opposite categories to those in the previous 'high knowledge' list (see list

above) were more likely to have low knowledge, such as those who have not travelled to Asia (53 percent) and those *without* a degree qualification (44 percent).

Analysis across all of the survey answers reveals young people were both less knowledgeable about Asia and less likely to perceive the importance of Asia. Similar research among school leavers commissioned by the Foundation in 2016, *Losing Momentum*⁵, found only eight percent of Year 12 and 13 students were 'Asia-ready'.

There is a segment of people with high involvement in Asian culture/ people who are confident and knowledgeable about Asia

By examining self-assessed knowledge with 'actual' knowledge (from the general knowledge questions) it is clear that some people appear to be more 'confident' about their knowledge of Asia than others.

Almost a quarter of the population were both 'confident in their knowledge' (i.e. they said they knew either a 'fair amount' or 'a lot' about Asia) and had scored higher than average for 'actual' knowledge (i.e. they scored three or higher out of six on the general knowledge questions). As Fig.5 (right) shows, 23 percent of respondents were in this segment, which is labelled as 'confident knowledge'.

Involvement with Asian culture and Asian people is the defining characteristic of this segment. Almost two-thirds (63 percent) of this segment said they had at least a fair amount of involvement with Asian culture or with people who identify as Asian⁶.

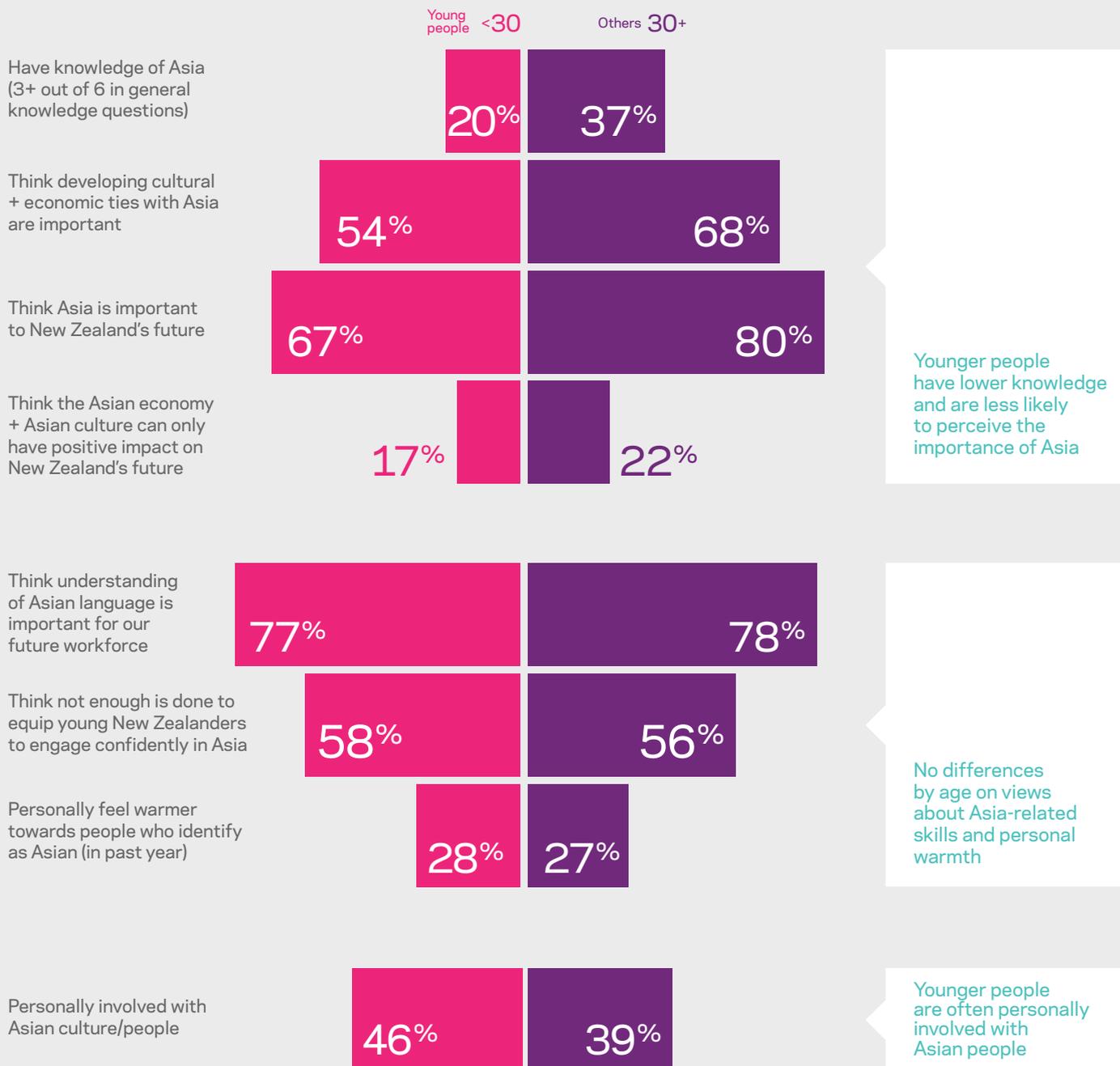
The link between personal involvement in Asian culture (through travel, events, people or food) and Asia-related knowledge is explored further in the next section entitled 'What enables Asia-related knowledge?' (Pages 16-26).

5 *Losing Momentum - School Leavers' Asia Engagement* - <http://www.asianz.org.nz/reports/reportschool-leavers-asia-engagement-2016/school-leavers-asia-engagement-2016/>

6 In contrast, those who are involved with Asian culture/people only make up 36 percent of the overall survey population.

Figure 5

How young people (aged under 30) differ from others



There is a group of young people who have low confidence and low knowledge

As Fig.6 (right) shows over four in 10 said they knew 'a little' or 'almost nothing' about Asia and had lower than average 'actual' knowledge (i.e. they scored less than three out of six on the general knowledge questions). We label this group as being 'disengaged'.

Young people (aged under 30) were particularly likely to be in this segment (49 percent, compared with 43 percent of the overall population).

Particular groups of young people were more likely to be in the 'disengaged' segment:

- Young females aged under 30 (60 percent).
- Young people aged under 30 who identify as New Zealand European (56 percent).
- Young people (aged under 30) living outside of Auckland, Wellington and Christchurch (53 percent).

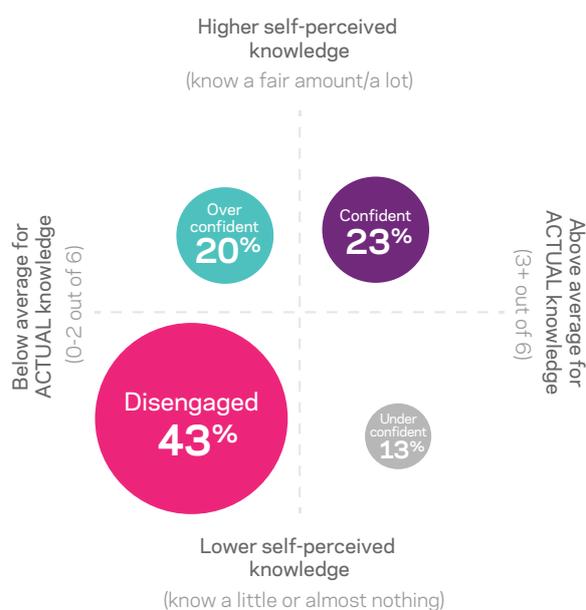
Other groups in the general population (not just youth) were also more likely to be in the 'disengaged' segment:

- Those who have never travelled to Asia (57 percent).
- Māori (54 percent) and, to a lesser extent, New Zealand European respondents (48 percent).
- Those without a tertiary degree (51 percent).

Please note there are not many unique population characteristics within the remaining two segments: 'over-confident' and 'under-confident' apart from:

- Young males (aged under 30) were more likely to be in the 'over-confident' segment (34 percent of them were in this segment compared with 20 percent of the overall population).
- Those with a non-New Zealand European ethnic identity (such as 'British') were more likely to be in the 'under-confident' segment (39 percent compared with 13 percent of the overall population).

Figure 6
Perceived vs actual knowledge



A segment could not be assigned to 1% of respondents because they answered 'don't know' to questions about self-perceived knowledge.

Those with knowledge of Asia tend to view Asian countries as 'friendly' towards New Zealand

Later in the report (pages 35-47) we investigate views towards countries which are perceived to be 'friendly' towards New Zealand and countries which are perceived to be 'threats' towards New Zealand.

Analysis of knowledge and viewpoints about countries reveals the majority of those with high knowledge of Asia think Asian countries are friendly towards New Zealand. As the Figure below shows, those with high knowledge were significantly more likely than those with low knowledge⁷ to think Japan, China, India, South Korea, Singapore, the Philippines, and Indonesia are friendly towards New Zealand.

⁷ 'High knowledge' was defined as providing four or more correct answers from six general knowledge questions about Asia. 'Low knowledge' was defined as providing no correct answers, or only one correct answer).

Figure 7
Views on friendly countries (high Asia knowledge vs. low Asia knowledge)

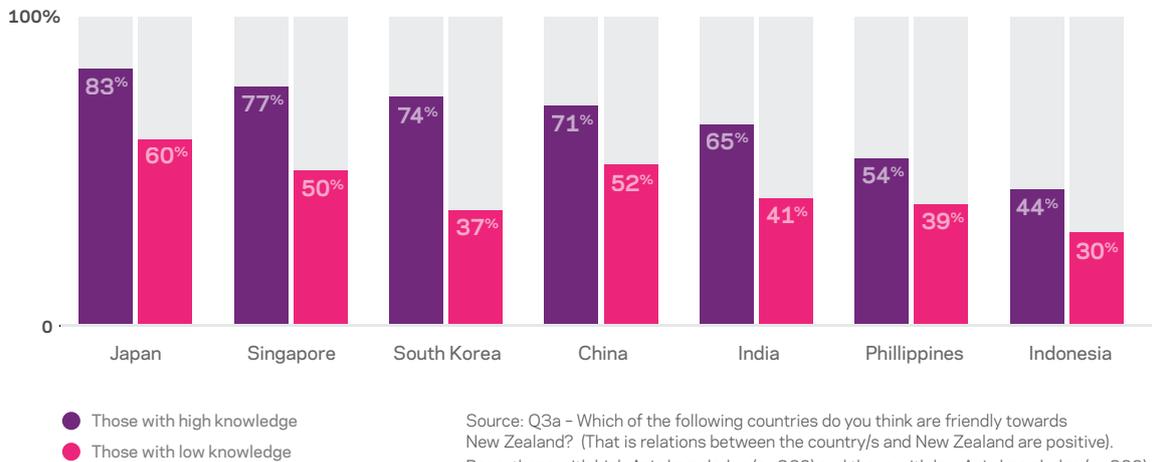
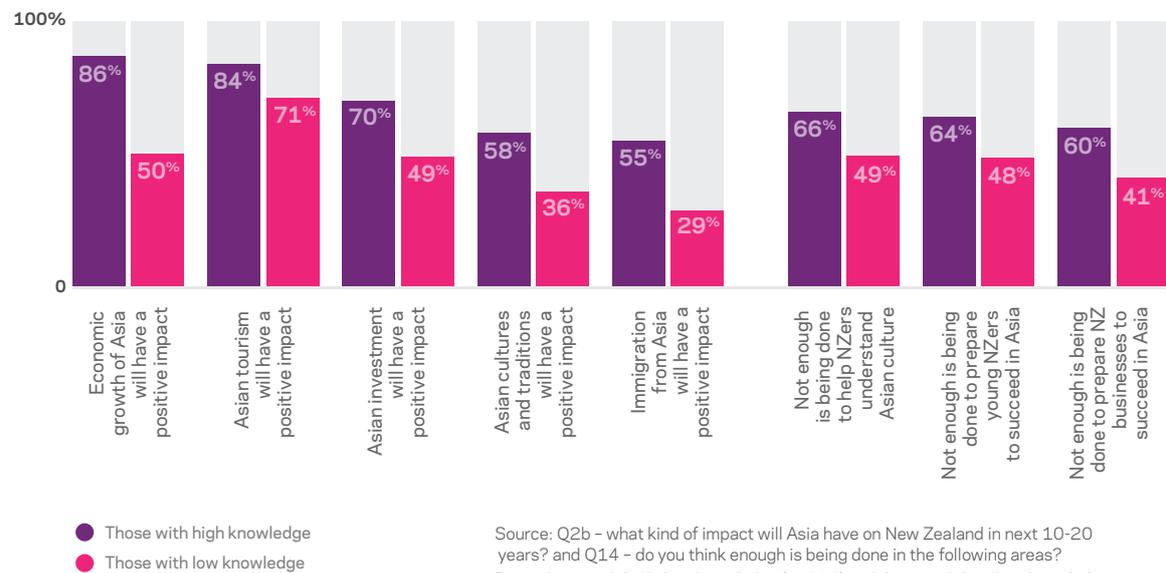


Figure 8
Views of those with high Asia knowledge vs. low Asia knowledge



Knowledge of Asia is associated with positive perceptions about the impact of Asia on New Zealand

Knowledge of Asia goes hand-in-hand with more positive feelings about the impact of Asia. In particular, almost nine in 10 of those with high

knowledge think Asian economic growth will have a positive impact on New Zealand in the next 10-20 years.

Knowledge of Asia is also associated with a sense that more needs to be done to prepare New Zealanders to engage with Asia. Around two-thirds of those with high knowledge feel not enough is being done.



What enables Asia-related knowledge?



This section draws upon survey data and findings from the focus groups to examine the various influences of Asia-related knowledge.

Key findings



'Travel to Asia' is the biggest predictor of knowledge across the overall population. The experience of travelling to Asia is more important for predicting knowledge than demographic factors such as education, age, ethnicity and language. Knowledge is particularly high among those who have travelled on business or as a volunteer.

Involvement with people who identify as Asian is another key predictor of knowledge. More than four in 10 New Zealanders say they are 'involved with Asian culture or people'.

Most 'involvement' with people who identify as Asian happens at work (seven in 10 of those who are 'involved'), **closely followed by eating out** (six in 10).

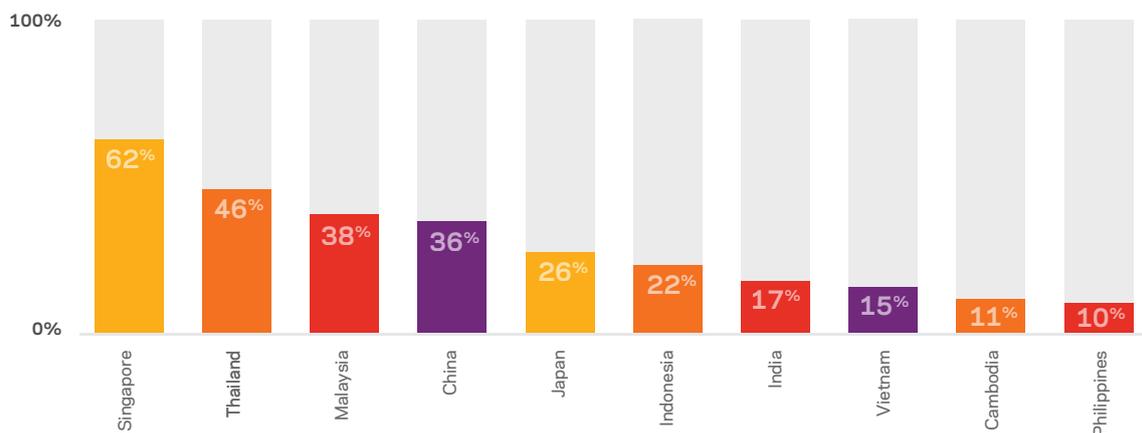
Although it is not strongly associated with knowledge, **there is widespread interest in Asian food.** More than seven in 10 New Zealanders are interested in Asian food and cuisine.

Focus Group Insights

Participants said **food** serves as a gateway for starting conversations about Asian culture.

The **media**, including social media, had an important influence on participants' perceptions of Asia. This influence sometimes created negative perceptions, particularly among those with no personal connections to Asia.

Figure 9
Asian countries travelled to, or lived in, within respondent's lifetime
(Among those who have travelled/lived in Asia - note only top 10 shown)



Source: Q18b - Which country/countries have you travelled to?
Base: All who have travelled to, or lived in, an Asian country (n=1020)

Around half of New Zealanders (54 percent) have travelled to, or lived in, Asia

As described below, travelling to Asia is strongly associated with Asia-related knowledge. The high proportion that have travelled to Asia helps explain its relative importance as a predictor of knowledge compared with Asia-related activities undertaken by smaller numbers of people, such as speaking an Asian language or being involved in Asian arts and cultural activity⁸.

The following groups were more likely to say they have travelled to Asia:

- Those who speak an Asian language (81 percent have travelled to Asia).
- People born outside New Zealand (73 percent).
- Degree qualified respondents (66 percent).
- Males (61 percent compared with 47 percent of females).

- People who identify with an Asian ethnicity (87 percent compared with 51 percent of New Zealand Europeans, 40 percent of Māori, and 24 percent of Pacific respondents).
- People living in Auckland (59 percent).

Young people were less likely to say they have travelled to Asia (39 percent of those aged under 30 compared with 59 percent of those aged 30 and over).

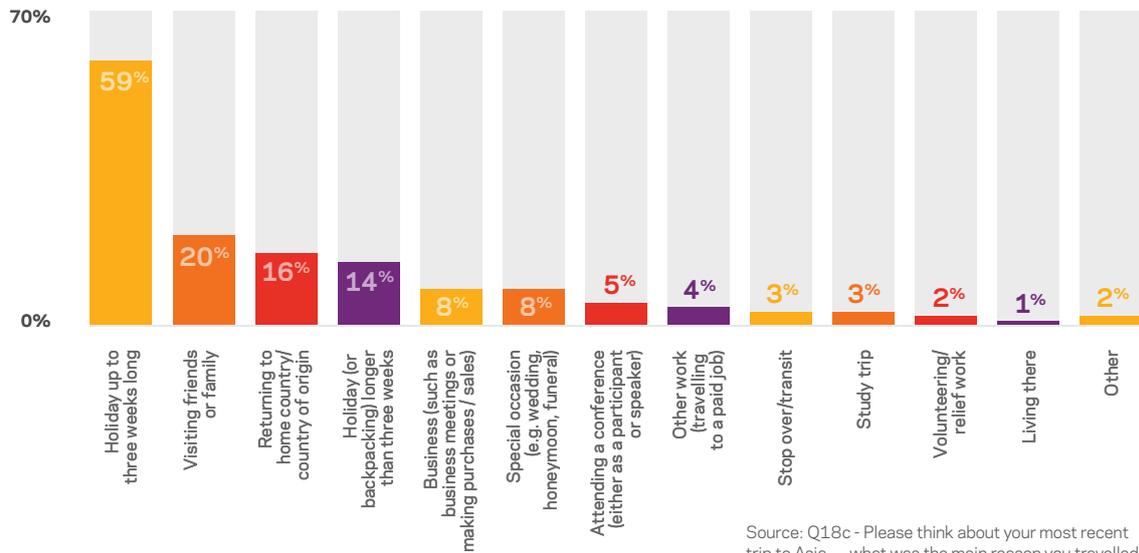
As Fig.9 (above) shows, the most commonly visited destinations among those who have travelled to Asia were Singapore (62 percent), Thailand (46 percent), Malaysia (38 percent), China, including Hong Kong (36 percent), and Japan (26 percent).

When asked to describe the main purpose for their most recent trip to Asia, 59 percent of those who have travelled to Asia said it was for a holiday up to three weeks long. Twenty percent said they were visiting friends or family⁹ and 16 percent were returning to their home country.

⁸ Eighteen percent of respondents said they spoke an Asian language, although two-thirds of these respondents said they either only knew some basic greetings and introductions or could hold a basic conversation. Nine percent of all respondents said they interacted with Asian culture/people through 'arts/cultural activity'.

⁹ Note most of these respondents explicitly identified that the purpose was to visit friends/family rather than a holiday.

Figure 10
Reason for most recent visit to Asia



Source: Q18c - Please think about your most recent trip to Asia ... what was the main reason you travelled?
Base: All who have travelled to Asia (n=1020)

The experience of travelling or working in Asia is the biggest predictor of knowledge across the overall population

Knowledge of Asia (as measured by the knowledge test) is strongly associated with a number of variables included in the survey. Multivariate analysis identified some key characteristics that are associated with high knowledge. The following characteristics explain variation in Asia-related knowledge across the general population (listed in order of importance)¹⁰:

1. Travelling to Asia.
2. Being involved with Asian culture or with people who identify as Asian.

3. Being older – people aged under 30 have significantly lower knowledge.
4. Having a degree qualification.
5. Speaking an Asian language.

The experience of travelling to Asia is the largest predictor of knowledge – it is a more important predictor than ethnicity, speaking an Asian language, or age.

An explanation of this type of analysis using plain English is:

Whether someone has travelled to Asia is the quickest way to predict whether a member of the general public has a high level of knowledge about Asia.

10 Technical details are described in this footnote: the analysis chosen was CHAID (which stands for Chi-square Automatic Interaction Detector). The six variables featured in the CHAID answer-tree - other variables did not. The chi-square differences is a reasonable proxy for the strength of differentiation on the overall knowledge-score. The most significant difference (at the top

of the CHAID tree) was 'Travel to Asia' (chi-square score of 159 indicating that this was the most significant variable explaining variation in knowledge). Equivalent chi-squares for other variables were: *being involved with Asian culture or with people who identify as Asian* (47), *being older - particularly over 40* (26), *having a degree qualification* (12), and *speaking an Asian language* (11).



Figure 11

Influences on Asia-related knowledge

* The number in each circle represents the association between that variable and Asia-related knowledge.

This is the chi square difference made by this variable within a CHAID (Chi-square Automatic Interaction Detector) analysis against the knowledge score in the Asia-related knowledge questions.

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Working and volunteering in Asia provides a level of immersion which helps build knowledge

Some focus group participants have lived and worked in Asia. This provided a level of immersion that was not possible through a short holiday alone.

"It's really eye-opening [to visit an Asian country]. Me and my partner have travelled there a lot and we live there for a decent bit of time every time we go. You get to see how they live their lives over there and what it is like to be somewhere that's not an English-speaking country. It definitely gives you a better perspective."

Male, 20-24 years, Māori, Wellington

"If you've travelled, you feel more confident about knowing the people and the culture."

Female 35-39 years, New Zealand European, Auckland

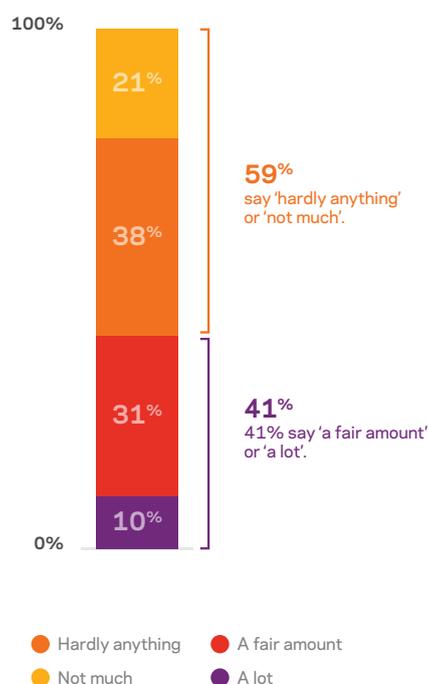
The survey also reflected these findings. Those whose most recent trip to Asia involved a business trip or volunteering were particularly likely to have high knowledge. Fifty percent of people who have been on a business trip to Asia scored four or more out of six. The equivalent figure for those who have volunteered in Asia was 33 percent, whereas only 13 percent of the overall population scored four or more.

Aside from demographics, 'involvement' with people who identify as Asian is another key predictor of knowledge

As Fig.11 (left) shows, key demographics such as age (particularly being over 40 years old) and education (in particular having a degree qualification) are associated with Asia-related knowledge.

In addition to these demographic factors, involvement with people who identify as Asian is strongly associated with Asia-related knowledge (the strength of association is described in footnote 9 on page 19).

Figure 12
Personal involvement with Asian cultures/people who identify as Asian



Source: Q16a - How much do you personally have to do with Asian cultures or with people who identify as Asian?
Base: All New Zealanders, excluding those who said 'don't know' (n=1938)

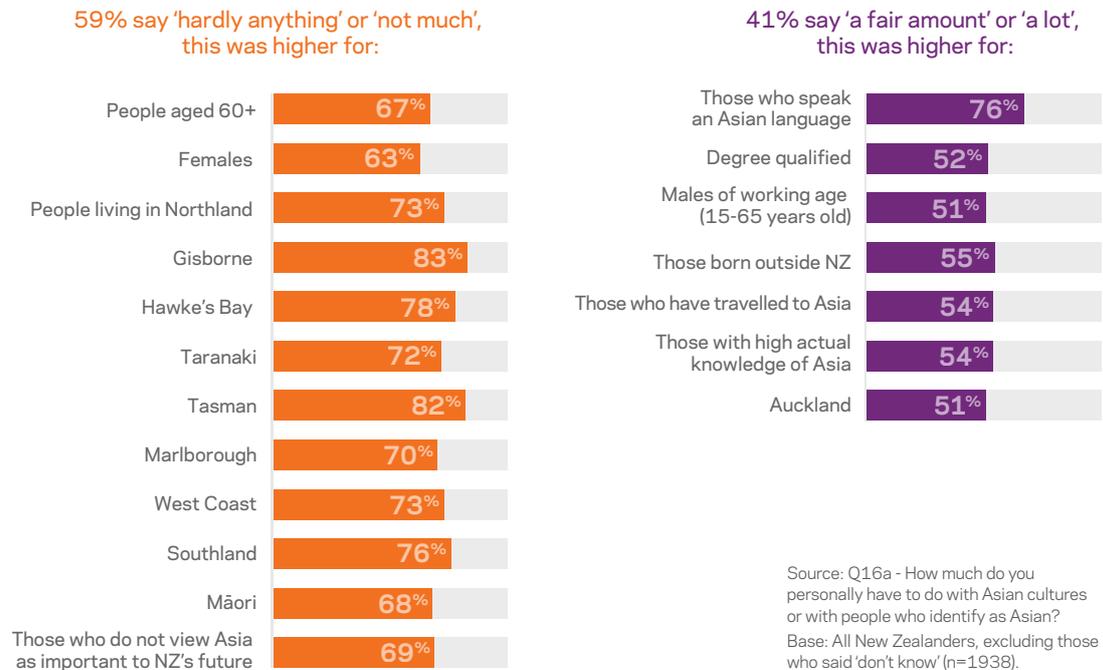
Involvement with Asian culture and people is relatively common in New Zealand. Just over four in 10 (41 percent) said they have 'a lot' or 'a fair amount' to do with Asian culture or with people who identify as Asian. (Findings are not directly comparable with previous surveys which used the phrase 'Asian people' rather than 'people who identify as Asian').

As Fig.13 (overleaf) shows, 'involvement' varies significantly. Those who speak an Asian language, those with a degree qualification, working-age males, those who have travelled to Asia, and Aucklanders were more likely than average to say they are involved with Asian peoples or cultures.

Those living in provincial regions such as Gisborne, Tasman, Hawke's Bay, Southland and the West Coast were least likely to feel involved.

Figure 13

Variation in personal involvement with Asian cultures/people by subgroup



Most 'involvement' with people who identify as Asian happens at work

Those who felt 'involved' were asked about where they interacted with Asian peoples or cultures. Most interactions occur at work (68 percent of those who felt involved), closely followed by eating out (61 percent) or shopping (61 percent). Other relatively common places where interactions occur are on the street (43 percent), or at home (38 percent).

Although only 21 percent said they interacted via 'arts or cultural activity', this was strongly associated with Asia-related knowledge (as described earlier).

Some focus group participants described enjoyable in-depth discussions at work about Asian countries and Asian culture.

"I have an Asian colleague of similar age to me and we've become good friends over time. I talk to her about everything - their food, what it is like growing up there compared to here, how they get into universities and jobs."

Female, 25-29 years, New Zealand European, Wellington

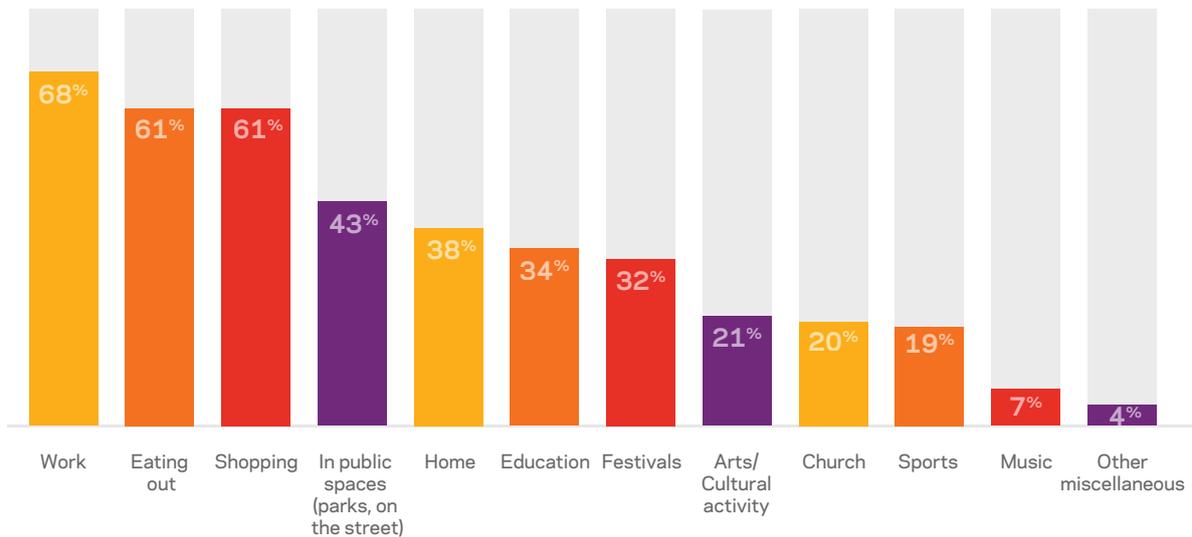
"We have quite a few Asian colleagues at my work. Some of them have been there for 10-15 years, working and living in Auckland. So I got to know a bit about them and their original country a little bit over the years. They seem pretty happy to talk about it and it makes for really interesting conversation. It's been my way of learning about Asia."

Male, 55-59 years, New Zealand European, Auckland

"I have a few colleagues who identify as Asian and sometimes I get a chance to have a chat with them now and then about events like Diwali and the reason behind it."

Male, 20-24 years, Māori, Auckland

Figure 14
Where people interact with Asian people/cultures



Source: Q16b - In your everyday life... where do you interact with Asian peoples or cultures?
Base: All those who are involved with Asian people/cultures (n=745)

As with the survey findings, focus group participants also described a range of other places where they interacted with Asian people and culture including at home, when shopping and at events.

"At Japan Day there's a whole mixture of food, culture and dance. I've been there a few times and it's awesome. Nothing quite like it."

Male, 30-34 years, Māori, Auckland

"I've got students who homestay with me. And we usually get to know them and their background over time. Especially when they get homesick and come talk to you and it's a nice way of giving them company and also gain a bit of an ongoing education about Asia."

Female, 40-44 years, New Zealand European, Auckland

"The only [Asian person] I come across is the owner of my local Asian supermarket. And he's nice and we have a little chat every time I need to pick something up from there. He has told me about his family traditions."

Male, 55-59 years, New Zealand European, Invercargill

"I went to the Terracotta Warriors exhibit at Te Papa and that was beautiful. I got to learn a bit about Chinese history and historic events."

Male, 35-39 years, Māori, Wellington

Asian food has wide appeal - more than seven in 10 New Zealanders are interested in Asian food and cuisine

More than eight in 10 (83 percent) New Zealanders have at least one Asia-related interest. In fact, the average number of Asia-related interests identified by New Zealanders was three out of 14 potential interests presented in the survey.

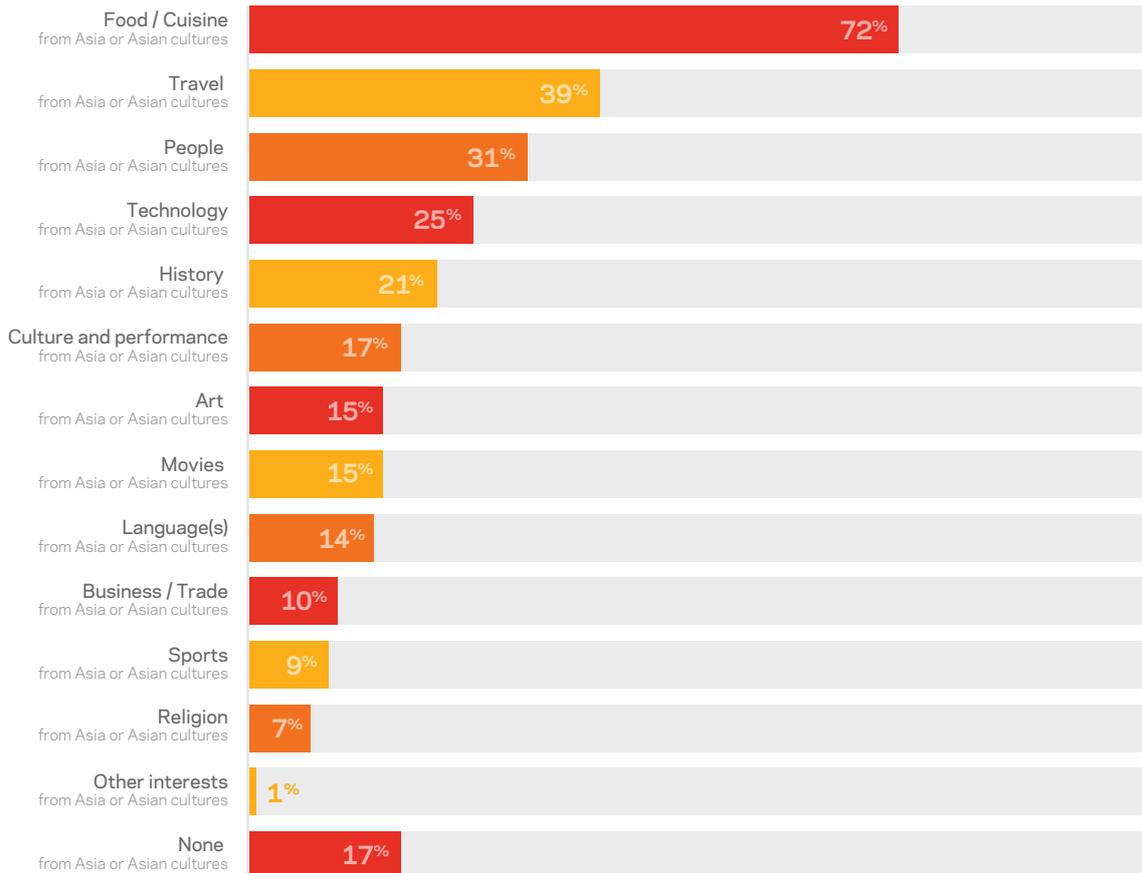
As Fig.15 (overleaf) shows, food is by far the most popular Asia-related interest - 72 percent of New Zealanders said they were interested in Asian food or cuisine. The next common Asia-related interest was travel (39 percent).

Even those with 'no perceived involvement with Asian culture/peoples' have Asia-related interests (77 percent). However, they have a narrower range

Figure 15
Asia-related interests

Source: Q16c - Do you have any of the following Asia-related interests?

Base: All New Zealanders (n=2,000) and those with/without involvement (n=748/n=1216)



of interests - on average they have two Asia-related interests, compared with four for those who feel involved with Asian culture/people.

The statistical analysis conducted earlier (on page 20) did not identify a close connection between Asia-related interests such as food and Asia-related knowledge. However, the wide-ranging appeal of Asian food means it has potential for increased dialogue about Asian culture. This was a topic discussed in detail by focus group participants (see right).

Food can trigger conversations about Asian culture

Focus group participants described how food gives them the chance to have shared experiences with their Asian friends or colleagues. This often acts as a trigger for discussions about Asian culture.

"I've got a few Asian friends and it's always better going out with them to try new Asian food. Because then there's someone friendly there with you and you laugh along together and experience it all much more socially."

Female, 20-24 years, New Zealand European, Auckland

"It is sometimes hard to immerse yourself in Asian culture - food is the easiest way into understanding Asian culture."

👤 Male, 30-34 years, New Zealand European, Auckland

"Food brings everybody together, no matter what your culture. Food is the best pathway to understanding a country's culture."

👤 Male, 40-44 years, Māori, Wellington

"An Indian parent at our school said to the after-school teachers 'I'll cook up a curry and bring it over for you every day of the week if you guys can keep an eye on one of my other kids.' We said 'Sweet' and so she brought over a different curry every day. She even made roti from scratch and showed us how to do it. Word got around to the other teachers that we were having this awesome curry every day. It was nice and we got to know her really well."

👤 Female, 40-44 years, Māori, Wellington

Participants described how the opportunity to encounter Asian food has grown rapidly. There was a sense that consumer tastes have evolved in New Zealand.

"In Europe, you wouldn't find Asian food beyond generic Chinese food (they have the Western style of Asian food). They haven't got to the stage where we are."

👤 Female, 20-24 years, New Zealand Chinese, Auckland

"With so much Asian food options now available, I think it just shows how New Zealanders are growing up and widening their palate."

👤 Male, 55-59 years, New Zealand European, Auckland

Participants often reflected upon differences between what they perceived as 'traditional New Zealand food' and the diverse nature of Asian food. By making these comparisons, participants were making connections between food and culture.

"A lot of cooking shows have segments where the contestants have to cook Asian food. Or they may have a segment where they take all the top contestants to a place in Asia. Those shows expose us to very different Asian cuisine and make it easier to try that same food out when you go out for food yourself."

👤 Male, 55-59 years, New Zealand European, Auckland

"Asian food is so different from the traditional meat and two veg. The best thing you can do [to interact with Asian culture] is to eat their food."

👤 Female, 55-59 years, New Zealand European, Auckland

"I think the Asian way of making and eating food diverges a little bit from our way of doing it. At work, we have a large community of Indian colleagues and they will all have their lunch together and they all share everything. And then you look over to the next table and you have Steve Smith with his sandwich doing his own thing. I think Asian food culture is much more inclusive."

👤 Male, 35-39 years, Māori, Wellington

The media has an important influence on people's perceptions of Asia. This influence can create negative perceptions if it reinforces pre-existing viewpoints among those with minimal personal connections to Asia

This year the survey did not explore the influence of media. However, the influence of media was discussed in detail during focus groups.

Mainstream media was often focus group participants' primary way to find out what happens in Asia on a daily basis. Consequently, the media has a powerful influence on what participants think and know about Asia. Participants in the 'low Asia-engagement' focus groups¹¹ often mentioned the important influence of mainstream media.

11 As described in the methodology section at the end of the report, two focus groups were recruited who had low engagement in Asia, and two focus groups were recruited who had high engagement in Asia.

"Most of what I know [about what's happening in Asia] is from the news. Especially those programmes in the evening... Seven Sharp and then The Project. They're really good. I usually try to catch at least one of them. 20/20 sometimes runs features on Asia and it's really fascinating."

Male, 40-44 years, New Zealand European, Invercargill

"Stuff and NZ Herald are always running stories about something or other happening [in Asia]. Or it's on the evening news."

Female, 50-54 years, New Zealand European, Invercargill

"The impression you get from media is a lot of bribery tends to go on. And some of that is based on fact. We did a job in Malaysia and we had to watch out for bribes. Corruption is more prominent in Asian countries."

Male, 55-59 years, New Zealand European, Auckland

Some participants, particularly those in the 'high Asia-engagement focus groups', highlighted what they regard as inaccuracies in reporting, and explicitly identified a difference between the media narrative and their own viewpoint.

"Anyone who's been to an Asian country can see how normal life is. But the [newspapers] will have you believe [Asian people] are living in these crime-infested hell-holes where no one can drive in a straight line and a thousand people a day die because of a war and natural disasters."

Male, 25-29 years, New Zealand Chinese, Auckland

"I think there is this political narrative these days of Asians investing in the housing market. And it is potentially dangerous because you can have ignorant people who don't really understand the housing market. If you want to see this in action just look at the comments on an article on Stuff."

Male, 35-39 years, Māori, Wellington

"If you keep listening to the media and all the negative stuff in there then it's pretty easy to start thinking the same way but if you wait and think 'well I met so and so and they're not like that' then you can judge for yourself and see through the lies."

Female, 40-44 years, New Zealand European, Wellington

"It's all about the number of clicks you can get on your headline and a bit ridiculous really. I guess they have to sell the news somehow. [The news] is not really based on facts sometimes."

Male, 40-44 years, New Zealand European, Wellington

As discussed later (under 'personal feelings towards people who identify as Asian' on page 50), the survey identifies a sizeable group of New Zealanders (around three in 10) that can distinguish between the perceived national discourse about Asian people and their own personal feelings.

Social media is an important avenue for information about Asia

Most of the focus group participants indicated that they regularly viewed content relating to Asia on social media, including travel blogs, pop culture material (such as animes, memes), Facebook newsfeeds and online cooking videos.

"You see a lot of travel blogs on Asia [on the internet] which are pretty interesting for me personally. And apps like TripAdvisor."

Male, 35-39 years, Māori, Wellington

"I've got Asian friends on Facebook and you just look at their posts and get a window into their culture."

Male, 40-44 years, New Zealand European, Wellington

"I like reading articles on the internet. They pop up on my Facebook now and then and they're pretty interesting. Occasionally you read about what's happening in Asia and you get the feeling there's always something bad happening over there."

Female, 50-54 years, New Zealand European, Invercargill

However, some participants described how these sources can trivialise Asia-related content.

"You come across random Facebook pages sometimes and end up looking through them. I was on a page about pets and a page about huskies in Bangkok popped up and I ended up going there. I wasn't looking for things on Asia or anything in particular but it just came up and it was videos of cute huskies running around in Thailand."

Female, 25-29 years, New Zealand European, Wellington

"There's a page called roundabouts or something with pictures of Asian drivers on roundabouts. Another page that pops up on my [Facebook] feed called Rasin Asians which is about Asian actors and stuff."

Female, 40-44 years, New Zealand European, Wellington



Do people think Asia-related knowledge is important?

This section of the report explores perceptions about the importance of Asia for New Zealand's future, including viewpoints about the importance of Asia-related skills for our future workforce.

Key findings



Despite low knowledge of Asia, **the region is viewed as the second most important for New Zealand's future** after Australia.

Around half of the population felt not enough is being done to equip New Zealanders to engage in Asia. Significantly, only 4 percent felt 'too much' is being done in this space.

However, importance is mainly viewed in economic terms. Sixty-two percent said it is important for our future workforce to be confident in dealing with people from Asian cultures. Fifty-two percent said understanding the Asian economy is important for our future workforce.

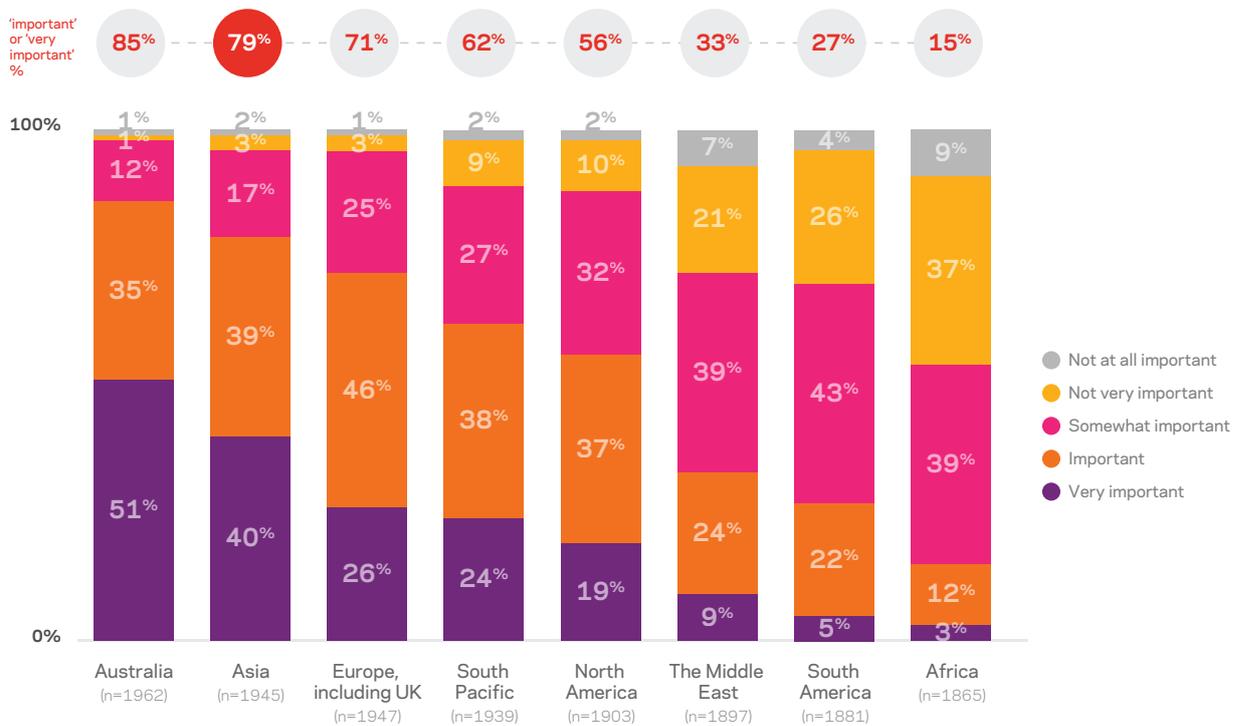
Less than half think it is important for the future workforce to understand Asian society, languages and history.

Focus Group Insights

Participants felt that understanding the Asian economy and relevant protocols would ensure New Zealanders could leverage business and economic opportunities in Asia.

This was viewed as critical for a small nation which relies on international trade.

Figure 16
Importance of regions to New Zealand's future



(n= number of respondents)
Source: Q1a - How important do you think each of the following regions are to New Zealand's future?
Base: All New Zealanders (n=2,000)

Asia is viewed as the second most important region to New Zealand's future (after Australia)

Australia and Asia were viewed as the most important regions for New Zealand's future. Eighty-five percent thought Australia was important. Eighty-five percent thought Australia was important to New Zealand's future and 79 percent viewed Asia as important (this finding is similar to previous *Perceptions of Asia* survey findings).

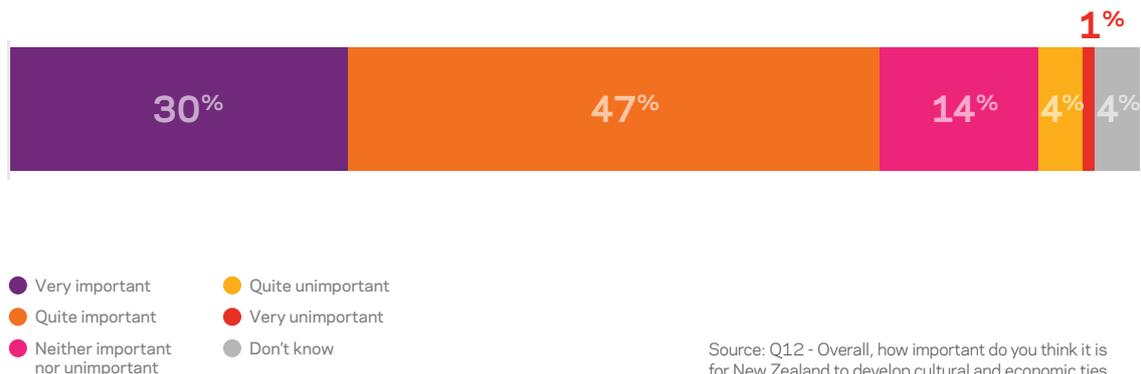
Other regions, such as Europe, the South Pacific and North America, were also viewed as important but to a lesser extent - around six in 10 viewed these regions as important for New Zealand's future. Only a minority viewed the Middle East,

South America and Africa as important for New Zealand's future.

It is interesting to note that Asia is viewed as more important than most other regions despite the fact that respondents feel they know more about Europe, the South Pacific and North America (refer to page 9 earlier for self-assessed knowledge of various regions).

Similarly, most New Zealanders (77 percent) agreed that developing cultural and economic ties with the peoples and countries of Asia is important for New Zealand.

Figure 17
Importance of developing cultural and economic ties



Source: Q12 - Overall, how important do you think it is for New Zealand to develop cultural and economic ties with the peoples and countries of Asia? Do you think it is...

Base: All New Zealanders excluding those who were asked a different label involving 'somewhat' instead of 'quite' - this was changed after interim results suggested the updated labels impacted comparability with previous waves (n=1,480)

The perceived importance of Asia has fluctuated in the past four years. This year, 79 percent of New Zealanders viewed Asia as important. This compares with 70 percent in 2016, 75 percent in 2015, and 80 percent in 2014. Some of the recent change may relate to a different data collection method (from telephone to online) because the perceived importance of most regions (not just Asia) increased a few percentage points this year. However, the increase in the perceived importance of Asia was larger than the equivalent increase for most other regions (with the exception of the South Pacific).

Perceived importance of regions fluctuates more than most other measures included in the survey. Fluctuation may reflect the impact of media coverage about global events and international affairs. Perceptions in 2017 have probably been influenced by news stories about significant tensions between North Korea and Western nations whereas in 2016 there was a significant

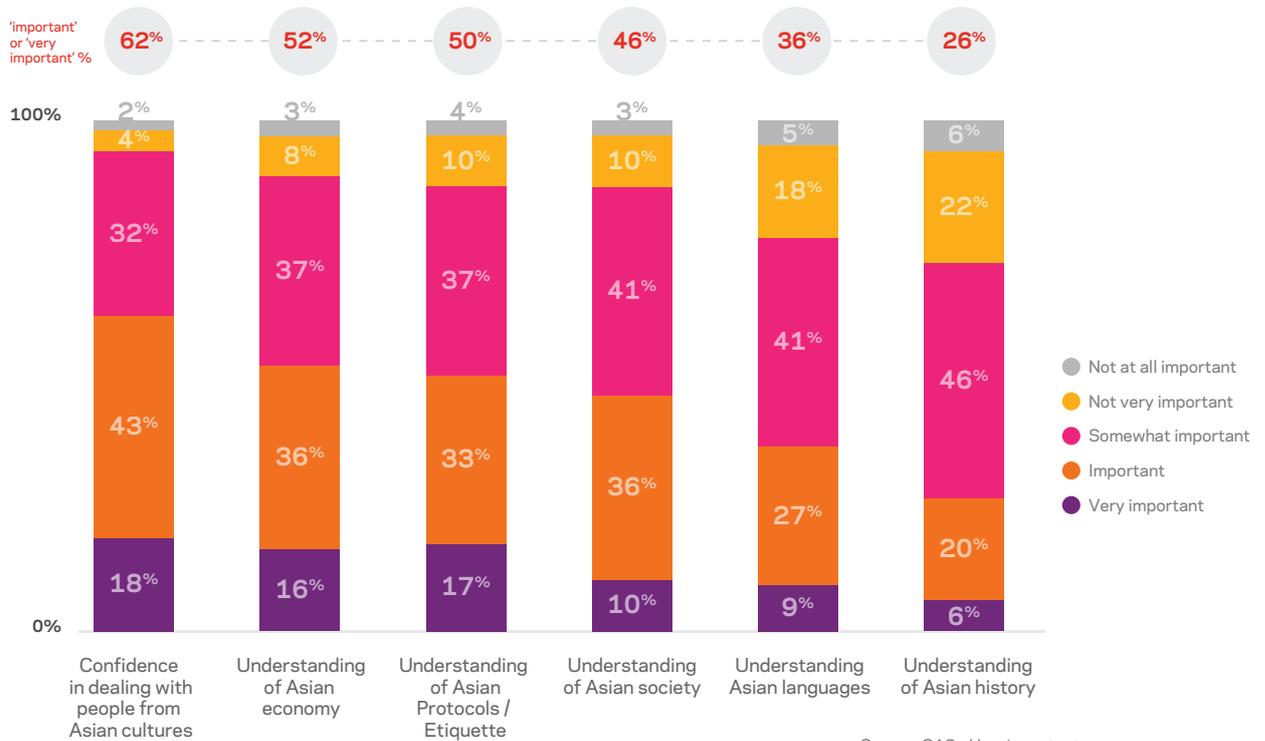
increase in the perceived importance of Europe - possibly because survey fieldwork was conducted one month after the Brexit vote.

The importance of Asia is mainly viewed in economic terms. Less than half think it is important for the future workforce to understand Asian society, languages and history

Sixty-two percent said it is important for our future workforce to be confident in dealing with people from Asian cultures. Fifty-two percent said understanding the Asian economy is important for our future workforce.

However, as Fig.18 (right) shows, fewer than half thought building an understanding of Asian society, languages and history is important for our future workforce.

Figure 18
Importance for our future workforce



Source: Q13 - How important are Asia-related skills (languages, understanding of Asian society, history, economies) for our future workforce?
Base: All New Zealanders (n=2,000)

Personal connections with Asia, rather than demographic characteristics, tend to influence views on the importance of Asia-related skills

Only 16 percent said it was important to have all of the Asia-related skills described in the survey (namely: confidence in dealing with people from Asian cultures, understanding the Asian economy, understanding Asian protocols, understanding Asian society, understanding Asian languages and understanding Asian history). This was higher for some groups in the population:

- Those who have recently moved to New Zealand - that is, have been living here for less than three years (31 percent).
- Those who speak an Asian language (30 percent).
- Those who have a 'lot' of personal involvement with Asian cultures/people (29 percent).
- Those with a 'high knowledge' of Asia (27 percent).
- Those who identify with an Asian ethnicity (27 percent).

Young people were significantly less likely to feel Asia is important to New Zealand's future - 69 percent of those aged under 30 felt it was important compared with 82 percent of those aged 30 and over.

Young people were also less likely to think that understanding Asian society was important (41 percent compared with 48 percent of those aged 30 and over). In addition, young people were less likely to think that understanding Asian protocols and etiquette was important (41 percent compared with 52 percent of those aged 30 and over).

These findings are similar to those reported in *Losing Momentum*, a survey of school leavers commissioned by the Asia New Zealand Foundation in 2016, which found fewer than four in 10 (37 percent) believed Asia-related skills and knowledge will be important for New Zealand's future workforce, a figure that had decreased since a previous survey of school leavers in 2012¹².

Please note that the long-term trends in the viewpoints of young people cannot be identified because of limited sample sizes in previous *Perceptions of Asia* surveys. However, the views of young people are explored more in the next section where negative perceptions about the impact of Asia on New Zealand's future were identified (see page 47 for details).

Focus group participants saw knowledge of the Asian economy and protocols/etiquettes as essential to compete in Asian markets

Focus group participants view the size of the Asian market, its proximity to New Zealand and our status as a small independent trading nation as critical to our economy. The region was seen as a major avenue for New Zealander exports.

"China and the rest of Asia are going to be the powerhouse driving the world. The centre of everything that's going to happen will be Asia. And we already have this established trade set up with them so it's doubly important for us to keep developing those ties."

Female, 40-44 years, New Zealand European, Wellington

"New Zealand's population is very small and we can't do everything without help from Asian countries. They're the closest market to us apart from Australia. We often don't realise the size and scale of Asia, being a little country ourselves. But it's quite mind-blowing how big the Asian economy and market is."

Male, 30-34 years, New Zealand European, Auckland

Participants in the focus groups felt that understanding of the Asian economy and etiquettes/protocols are essential to ensure New Zealanders can leverage business and economic opportunities in the Asian market. There was a sense that these skills will help instil confidence so New Zealanders can conduct their business on an equal footing with Asian businesses.

"It is important to understand the culture in order to do business with Asian people. [In Asia] you often start talking about business when you start getting drunk or are on your way to karaoke."

Female, 20-24 years, New Zealand Chinese, Auckland

"If I have a business that sells to China or something and I have to work with them then knowing about their protocol is important. You don't want to offend anyone and lose business."

Male, 45-49 years, New Zealand European, Invercargill

"If I have to go to China or work with people from there then my mind immediately focuses on the need to learn some of their language and culture so that I can work with them properly."

Female, 40-44 years, New Zealand European, Wellington

"I just think the Asian economy is going to be the centre of the universe so to speak. The business opportunities and market opportunities for New Zealand will be huge. So you do need to know about Asian countries to be able to succeed."

Female, 35-39 years, New Zealand European, Wellington

Focus group participants with more engagement in Asia also recognised the need to develop social and cultural skills.

Some focus group participants, particularly those with first-hand knowledge of Asia, felt relationships with Asia should move beyond just economics. They often felt that young people required cultural competency to grow up in an increasingly global environment. Participants discussed how the movement and interaction of people from different countries increases the need for mutual cultural understanding.

"I think kids should be taught to get rid of the us/ them mentality. I think it's a great idea to keep them as friends. The younger generation will be in a more global community."

 **Female, 35-39 years, New Zealand European, Auckland**

"A lot of Asian countries have a particular protocol or way of behaving. So understanding their etiquette and protocol is actually a way of showing that you respect their way of life."

 **Male, 40-44 years, New Zealand European, Wellington**

"If you are hiring people of another culture then you should understand where they're coming from. It is important to learn how different cultures meet and greet each other."

 **Female, 25-29 years, New Zealand European, Wellington**

With globalisation, some participants thought New Zealand society will naturally become more multicultural. They understood Asian people are an integral part of the country's makeup both now and in the future. Participants also recognised that immigration leads to more diverse communities whose members have a wider range of skills, ideas and viewpoints, and therefore contribute towards a more advanced society.

"Everyone is going to be a shade of caramel in 40 years. We're becoming more global and there's no fighting it. We can either get on board and acknowledge that New Zealand is getting more diverse and make that our strength or we get left behind."

 **Female, 40-44 years, Māori, Wellington**

"I think it's important for New Zealanders to understand why people come here. It could be for opportunity or it could be for safety. Understanding migrants will lead to better cohesion."

 **Female, 35-39 years, New Zealand Indian, Auckland**

"We have so many people who identify as Asian in New Zealand now and Asian culture is everywhere, so if you don't understand Asian society it almost limits your ability to understand the world around you."

 **Male, 25-29 years, New Zealand European, Wellington**

"It's a matter of people cranking open minds so people realise the richness that comes from diversity, rather than thinking there are too many of them. Even learning about one or a couple of cultures will help."

 **Female, 45-49 years, New Zealand European, Auckland**

Although there are mixed views about the importance of Asia-related skills, there is a general sense that more should be done to prepare young people and businesses to succeed in Asia

Survey respondents were asked if they felt enough was being done to equip New Zealanders to engage in Asia. Around half of the population felt not enough is being done:

- 57 percent said not enough is being done to help New Zealanders understand Asian cultures and traditions.
- 56 percent said not enough is being done to prepare young New Zealanders to engage confidently in Asia.
- 50 percent said not enough is being done to equip New Zealand businesses to succeed in Asia.

The types of people who felt 'not enough' is being done were similar to the type of people that felt that Asia-related skills were important (described previously on page 31).

As Fig.19 (below) shows, only 4 percent felt 'too much' is being done to equip New Zealanders to engage in Asia.

Figure 19
Whether enough is being done to equip New Zealanders to engage in Asia

To understand cultures and traditions



To prepare young New Zealanders to engage confidently



To equip New Zealand businesses to succeed



- Not doing enough
- Doing too much
- Doing enough (about right)
- Don't know

Source: Q14 - From what you already know, do you think enough is being done in the following areas?

Base: All New Zealanders (n=2,000)



How do New Zealanders perceive Asian countries and their impact on New Zealand?



This section of the report looks at how New Zealanders perceive some countries in Asia, relative to others. Who do New Zealanders regard as friends and who do they see as threats? Perceptions about the impact of Asia on New Zealand's future is also explored.

Key findings



New Zealanders tend to think most countries are friendly towards New Zealand, although the 'friendliest' were perceived to be Australia (37 percent), the United Kingdom (18 percent) and Canada (10 percent).

More than half of New Zealanders viewed North Korea as our biggest threat. However, the United States and China are viewed as the next biggest threats (8 percent and 6 percent respectively).

Almost two-thirds of those who were aware of the **Belt and Road Initiative** did not have strong views about how it will impact New Zealand.

The majority see Asian economic growth as a positive influence on New Zealand's future. More than eight in 10 were positive about the impacts of Asian tourism, more than seven in 10 were positive about the economic growth of the Asia region, and more than six in 10 were positive about investment from Asia.

However, **slightly fewer than half were positive about the influence of Asian cultures and traditions** and **only four in 10 were positive about the impact of immigration from Asia.**

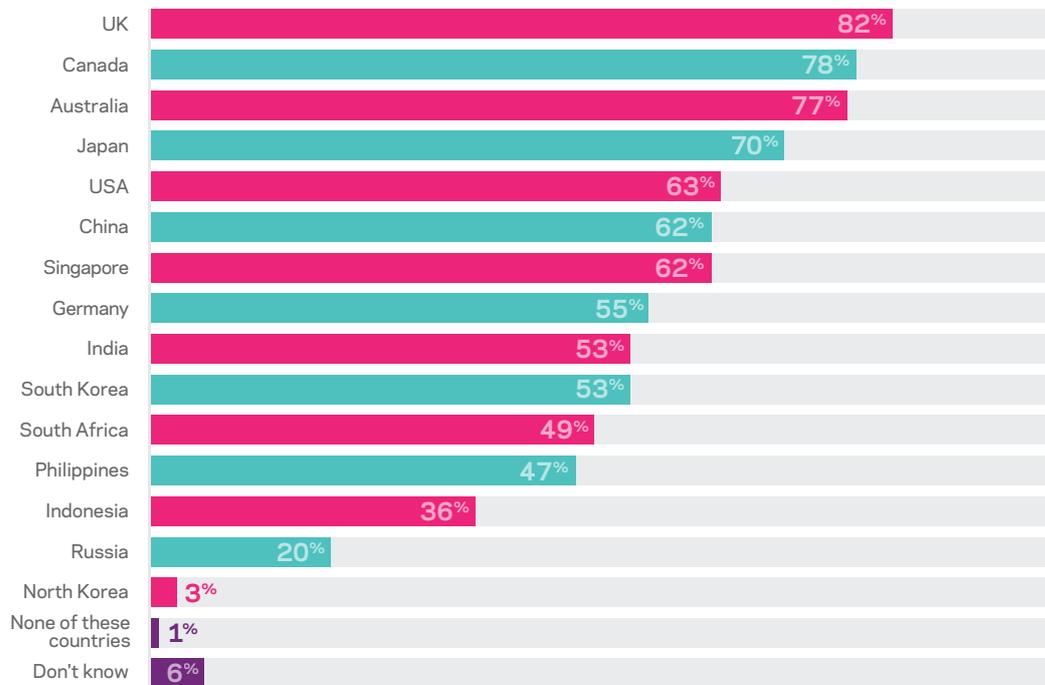
Twenty-two percent of New Zealanders thought Asia could only have a positive impact on the future of New Zealand. A smaller group, 13 percent, were consistently negative.

Focus Group Insights

Most participants framed 'impact' in economic terms – either positively (about the need for New Zealand to maintain economic relationships with Asia) or negatively (about the perceived negative impacts of investment from Asia).

Figure 20

Which countries are friendly towards New Zealand (relations between countries are positive)



Source: Q3a - Which of the following countries do you think are friendly towards New Zealand? (That is relations between the country/s and New Zealand are positive).

Base: All New Zealanders (n=2,000)

New Zealanders think most countries are friendly towards New Zealand although they believe Australia, the United Kingdom and Canada are ‘the friendliest’

Respondents were asked two questions: ‘which countries are friendly towards New Zealand?’ and ‘which country is *friendliest* towards New Zealand?’

Fig.20 (above) shows New Zealanders tend to think most countries are friendly towards New Zealand, although the ‘friendliest’ were perceived to be Australia, the United Kingdom and to a lesser degree Canada and China. Interestingly, only 1 percent thought the United States of America was ‘the friendliest¹³’ whereas 6 percent thought that China was ‘the friendliest’.

Survey respondents with an Asian ethnic identity were only slightly more likely to perceive Asian countries as being ‘friendly towards New Zealand’ (89 percent mentioned at least one Asian country as being friendly, compared with 85 percent of all respondents), but they were significantly more likely to choose an Asian country as being ‘the friendliest’ (43 percent, compared with 13 percent of all respondents).

Focus group participants felt New Zealand shared linguistic and cultural ties with Australia, the United Kingdom, and Canada. For this reason, those countries were perceived as being ‘friendly’ towards New Zealand.

“[Australia, the United Kingdom, and Canada] are like the old boys. Part of the Commonwealth. Especially Australia. We’re ANZACs.”

Male, 35-39 years, Māori, Wellington

13 Please note that the United States of America does not feature in the Figure describing ‘the friendliest’ because that Figure only shows the ‘top 5 friendliest’ countries (China does feature because it is in the ‘top 5 friendliest countries towards New Zealand’).

Figure 21

**Country
which is the
friendliest
towards
New Zealand
(Top 5)**

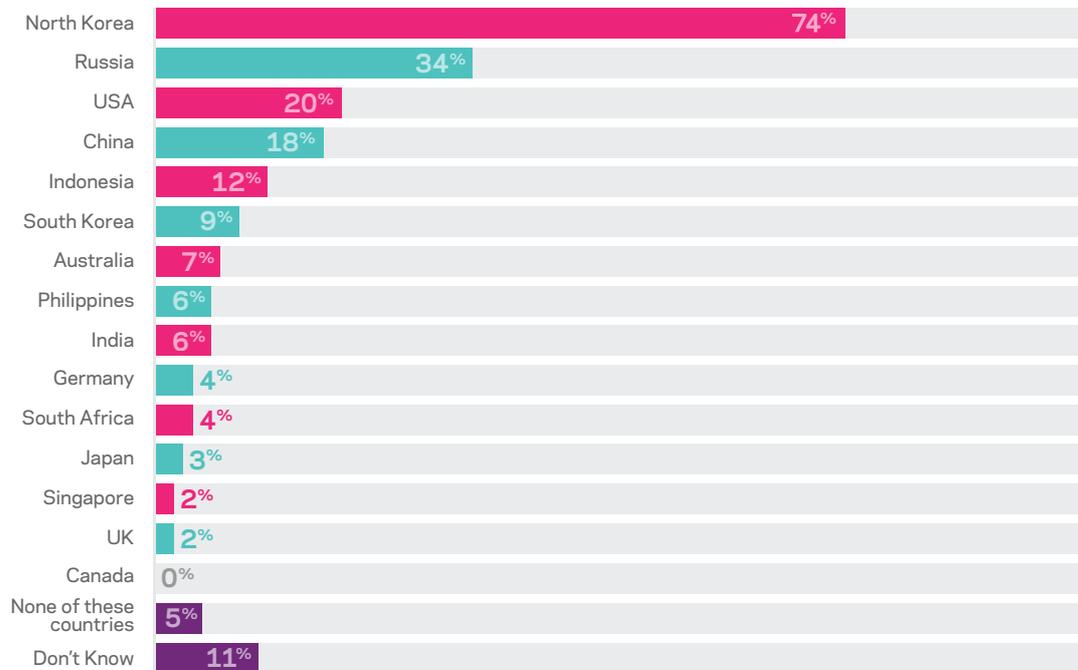


Source: Q3b - And which one do
you think is the friendliest?
Base: All New Zealanders (n=2,000).

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Figure 22

Which countries are threats towards New Zealand (relations between countries are not positive)



Source: Q3c - And which ones do you think are threats towards New Zealand? (That is relations between the country/s and New Zealand are not positive).

Base: All New Zealanders (n=2,000)

"We have a common creed and culture especially with the UK."

Male, 25-29 years, New Zealand Pakistani, Auckland

"It's easiest to understand the culture of the United Kingdom and Australia. And we can travel to them and work there."

Female, 25-29 years, New Zealand European, Wellington

"We can travel to Australia, the United Kingdom and Canada really easily. They share similar laws and ways of life. They align with our theological views too."

Female, 45-49 years, Māori, Wellington

All focus group participants mentioned China is a key economic partner for New Zealand. Media coverage of New Zealand businesses in the Chinese market and trade agreements are the key drivers of perceptions of China being a friendly country. However, as described on the next page, China's economic might is sometimes perceived as a threat to New Zealand.

"Our relationship with China is different to [Australia, the United Kingdom and Canada]. We're close to China because we are economically tied to them. We were the first [developed] country to sign a free trade agreement with them."

Female, 45-49 years, New Zealand European, Wellington

"We're not culturally similar to China but we are very economically tied to them and because of that we are very friendly with them. You can see it from the Free Trade Agreement we started with them."

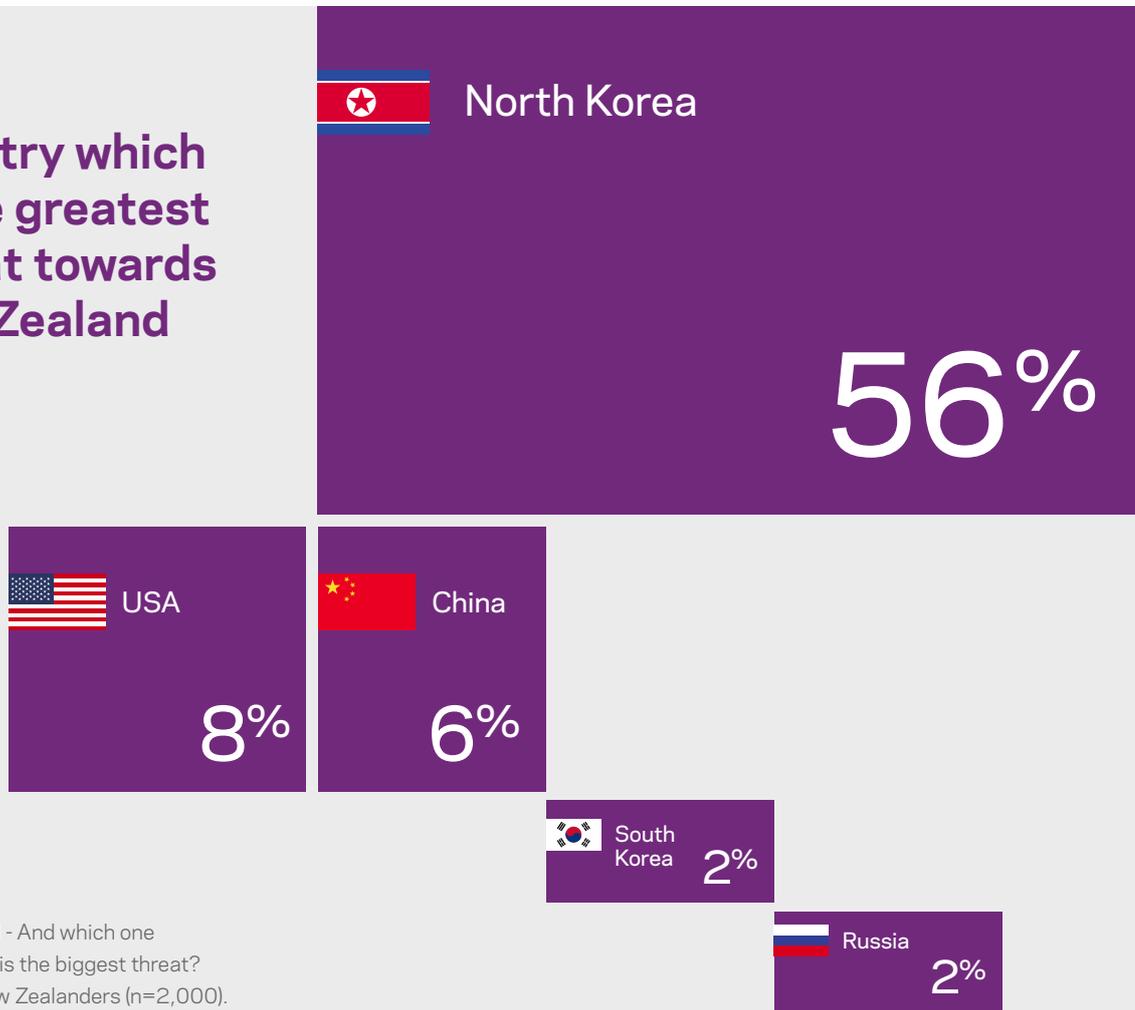
Male, 25-29 years, New Zealand European, Wellington

"A lot of New Zealanders view China as both a positive and negative influence on New Zealand. It's a polariser. We like the economic benefits but we may view them as sort of corrupt."

Male, 25-29 years, New Zealand European, Auckland

Figure 23

Country which is the greatest threat towards New Zealand (Top 5)



Source: Q3d - And which one do you think is the biggest threat?
Base: All New Zealanders (n=2,000).

More than half of New Zealanders view North Korea as our biggest threat. However, the United States and China are viewed as the next biggest threats

Respondents were asked two questions: 'which countries are threats towards New Zealand?' and 'which country is the biggest threat towards New Zealand?'

Fig.22 shows most New Zealanders viewed North Korea as a threat. Other countries viewed as threats include Russia, the United States, China and Indonesia.

Survey respondents with an Asian ethnicity were less likely to perceive Asian countries as being a threat towards New Zealand - 65 percent mentioned at least one Asian country (not including North Korea) as being a threat, compared with 83 percent of all respondents¹⁴.

The proportion of the overall survey population that viewed the United States as a threat is higher than the proportion that viewed China as a threat. This mirrors similar trends in the 2017 Lowy Poll which showed declining trust towards the United States among Australians¹⁵.

Perhaps surprisingly, around one in 10 thought South Korea was a threat. However, these respondents also tended to view North America as a threat and the focus groups revealed participants were concerned about escalating tensions on the Korean Peninsula and the possibility of nuclear conflict. Focus group participants also described how their views are shaped by a new era of uncertainty between global powers.

"Donald Trump and Kim Jong Un are at the same place. Who knows what Trump is going to do next?"

Male, 45-49 years, New Zealand Chinese, Auckland

"The common denominator here is that people don't trust the leaders of North Korea, USA, and Russia. And when you have nuclear weapons in the mix it gets serious."

Female, 20-24 years, Māori, Auckland

"China and the United States are competing to see who can be the biggest bully. They both have nuclear weapons and economic power."

Male, 30-34 years, New Zealand European, Auckland

Some focus group participants felt the Chinese government is opaque, which creates uncertainty around their political and economic intentions.

"China can be a bit of an unknown sometimes. Their government can be inscrutable."

Female, 20-24 years, Māori, Auckland

"There's an unknowingness about China. It reminds me of that expression "here be dragons". You look at some of the older maps of the world and this great big area that is China is just blank and filled with dragons. It all felt very unknown. And it still feels that way."

Female, 35-39 years, New Zealand European, Auckland

"The Chinese government can be a bit impenetrable. They keep their opinions private and do what they need to do."

Male, 45-49 years, New Zealand Chinese, Auckland

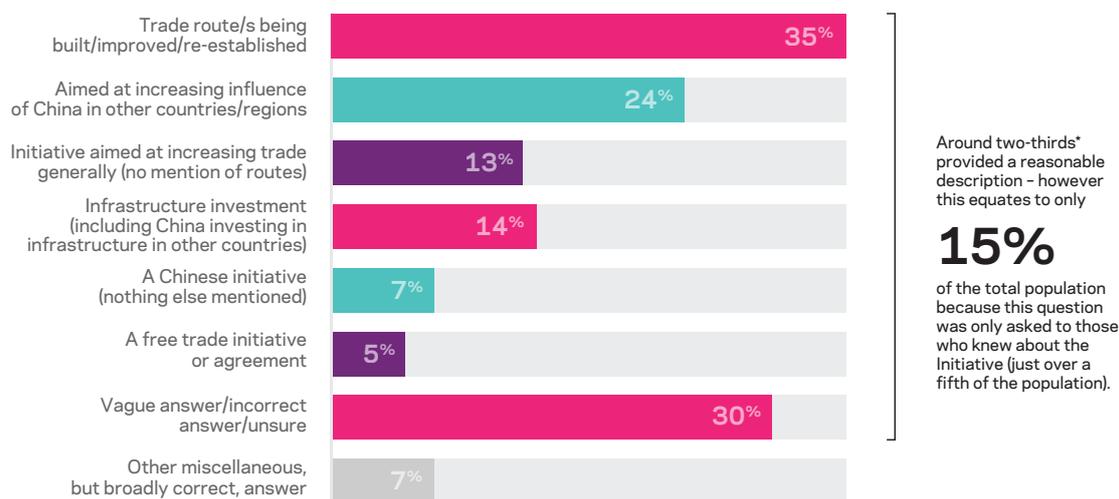
"China can be a bit oppressive to itself and its own people. And that seems like a threat to people from New Zealand who cannot stand living like that. It might not even be true but even the perception of China being like that can be off-putting."

Female, 25-29 years, New Zealand European, Wellington

14 Interestingly, respondents with an Asian ethnicity were slightly more likely to consider an Asian country to be the 'biggest threat' - 17 percent thought an Asian country (not including North Korea) was the biggest threat - this compares with 11 percent of all respondents (often these respondents selected China as the biggest threat).

15 See the 2017 Lowy Institute Poll - <https://www.lowyinstitute.org/publications/2017-lowy-institute-poll> - a number of questions are included in the Poll - one relevant one is the proportion that 'trust the United States to act responsibly' (61 percent in 2017, compared with 83 percent in 2016).

Figure 24
Description of the Belt and Road Initiative (among those who know about it)



Source: Q5Ab - Can you briefly describe what you know about the Belt and Road Initiative?

Base: All those who know at least a little bit about the Belt and Road (n=405)

* Note that people could provide more than one answer.

Only 15 percent understand the basics of the Belt and Road Initiative

Just over a third of New Zealanders (35 percent) have heard of the 'Belt and Road Initiative'¹⁶ and just over a fifth (22 percent) claim to know 'at least a little bit about it'.

However, when asked to describe the Initiative using their own words, it is clear some people only know the Initiative by name. In total, only 15 percent of New Zealanders could provide a basic, but reasonable, description¹⁷. Most described it as a trade initiative and about half spontaneously mentioned that it was a Chinese initiative.

Most of those who are aware of the Belt and Road Initiative do not have strong views about how it will impact New Zealand

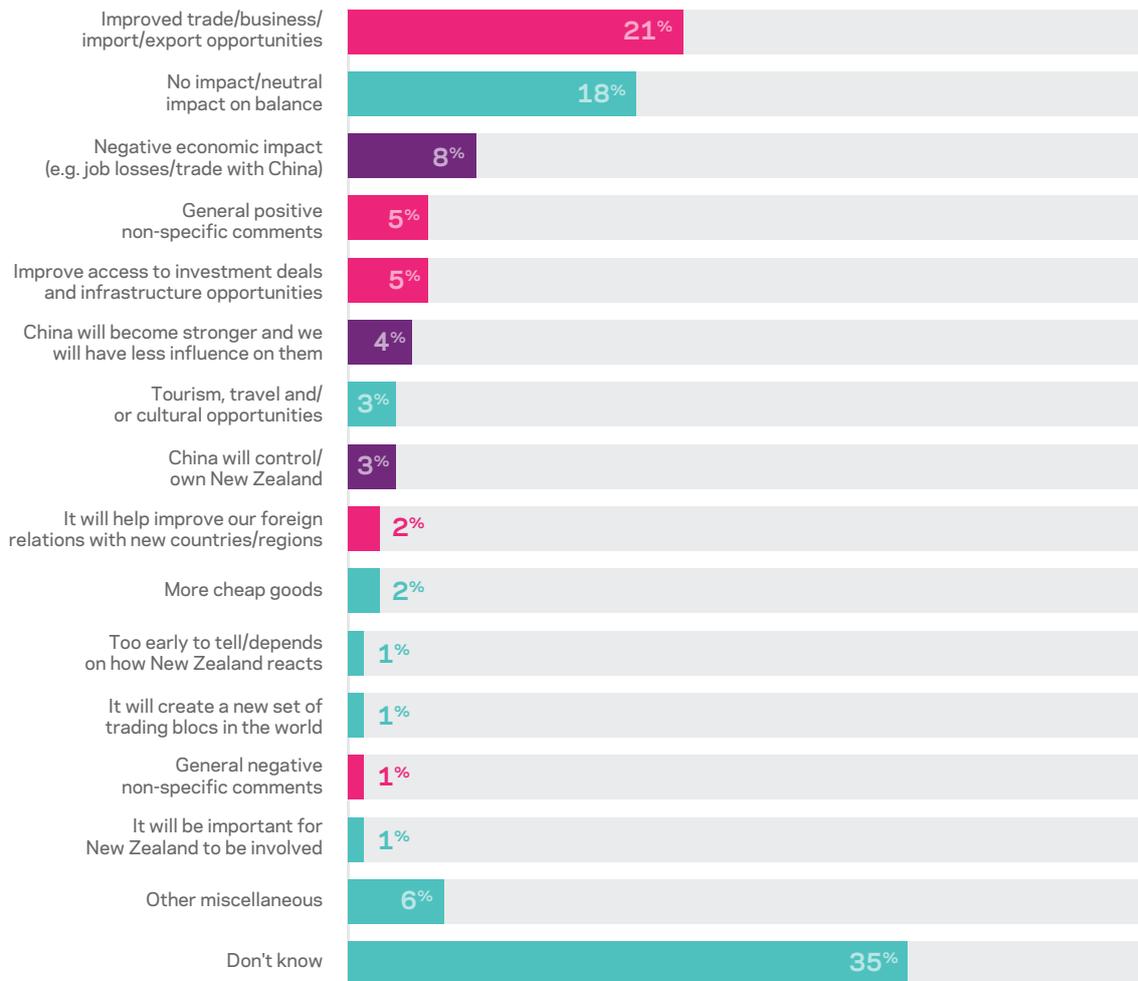
When asked about the impact of the Belt and Road Initiative on New Zealand, almost two-thirds of those who claimed to know about the Initiative were 'unsure' or said 'it would not impact New Zealand'. Around a fifth felt the Initiative would have a positive economic impact on New Zealand. Only a minority - around one in 10 - felt it would have a negative economic impact on New Zealand. No respondents described any non-economic impacts, mirroring findings elsewhere that New Zealanders mainly see the relationship with Asia in economic terms.

Analysis of the answers in Fig.24 (above) shows general sentiment about the impact of the Initiative was neutral. Among those who expressed a sentiment, positive answers tended to be more common than negative answers.

16 Colmar Brunton prompted respondents with the following description: *Which of these best describes your knowledge of the Belt and Road Initiative, also known as the One Belt One Road Initiative or the 21st Century Maritime Silk Road?*

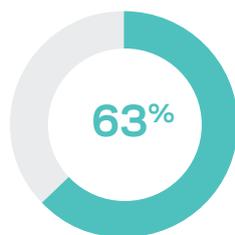
17 Colmar Brunton decided to set a low-bar on what counted as a 'reasonable description' - if the respondent described anything to do with trade, infrastructure, or it being a Chinese initiative (even if their description was brief) then we counted it as 'a reasonable description'.

Figure 25
Perceived impact of the Belt and Road Initiative on New Zealand
(among those who know about it)

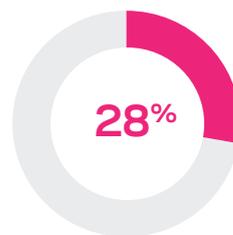


Sentiment analysis

Source: Q5Ab - In what ways do you think it will affect New Zealand?
Base: All those who know at least a little bit about the Belt and Road (n=405)
* Note that people could provide more than one answer



provided a neutral answer
(or said 'don't know')



provided a positive answer
(more common for those who have travelled to Asia - 33%).



provided a negative answer



Figure 26

Views about the positive impact of Asia on New Zealand's Future

* 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, excluding 'don't know' (refer to chart for base sizes)

Note: figures in chart are percentage who said 'very positive' or 'somewhat positive' impact.

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The majority think Asian tourism, economic growth and investment will have a positive impact on New Zealand. However, views are mixed on the impact of Asian cultures, traditions and immigration

The majority see Asian economic growth as a positive influence on New Zealand's future. More than eight in 10 were positive about the impacts of Asian tourism, more than seven in 10 were positive about the economic growth of the Asia region, and more than six in 10 were positive about investment from Asia.

However, as Fig.26 (left) shows, fewer than half were positive about the influence of Asian cultures and traditions and immigration from Asia.

Comparisons with previous surveys are not possible because the wording has been changed slightly and the move from a telephone survey to an online survey affected how people responded. This change resulted in a significant growth in those choosing the middle 'neither positive nor negative' category, which hinders attempts to compare the proportion responding positively over time.

Most focus group participants framed 'impact' in economic terms - either positively (about the need for New Zealand to maintain economic relationships with Asia) or negatively (about the perceived negative impacts of international trade and investment).

Some focus group participants framed the advantages of being connected to Asia in economic and geo-political terms. A relationship with the Asia region was seen as critical for New Zealand's long-term future.

"The world is now a global society. Even if you have some countries wanting to push back on that I think it's only short term. New Zealand is a very small part of it and we can't do much without help from Asia."

 Male, 55-59 years, New Zealand European, Auckland

"I saw President Xi Jinping on the cover of The Economist and it said 'most powerful man in the world'. Things happening in Asia will have huge implications for us over time."

 Male, 25-29 years, New Zealand European, Wellington

"Economically we are highly reliant on Asian countries. We can't cut off ties with any Asian country. And they are large in both actual size and economic power."

 Female, 35-39 years, New Zealand European, Auckland

Focus group participants with lower levels of engagement in Asia voiced concerns that investment from Asia was not in the best interests of New Zealand. They felt that New Zealand was 'losing control' of its economic assets.

"Any profits [foreign investors] make is repatriated. They are not for the benefit of New Zealanders."

 Male, 35-39 years, New Zealand Chinese, Auckland

"Why does the government allow foreign companies to cut trees and send them outside New Zealand? We should be adding value to raw resources here rather than carting it off overseas."

 Male, 50-54 years, New Zealand European, Invercargill

"New Zealand is losing products. Two New Zealand honey companies were bought by Chinese companies. Now it's very hard to find those products and their price has doubled."

 Male, 20-24 years, Māori, Auckland

"There's got to be controls around Asian investment. They want to buy because they want control. We lose control. Our government has got to be for New Zealand, not for the government in China."

 Female, 35-39 years, New Zealand European, Auckland

Some focus group participants also described perceived negative impacts associated with immigration (including perceptions about the impact on house prices and job losses). These perceptions are described further in the next section (which focuses on perceptions of people who identify as Asian).

A fifth of the population think Asia can only have a positive impact on the future of New Zealand. These are often people with personal connections to Asia

Colmar Brunton conducted positivity analysis on the survey answers provided about the impact of Asia on New Zealand's future. This identified that a fifth of New Zealanders only provided positive answers about the impact of tourism, economic growth, investment, culture and immigration on New Zealand's future (i.e. they did not provide any neutral or negative answers).

In total, 22 percent only provided positive answers to those questions. This was higher for the following groups of the population:

- Those who say they have 'a lot' to do with Asian culture/peoples (46 percent).
- Those who speak an Asian language (40 percent).
- Those who say they are feeling warmer towards people who identify as Asian (36 percent).
- Those with high knowledge (i.e. scored four or higher out of six in the knowledge test) (35 percent).
- Those not born in New Zealand (29 percent compared with 19 percent of those born in New Zealand).
- Degree-qualified respondents (27 percent compared with 18 percent of those without a degree).
- Males (26 percent compared with 17 percent of females).

Young people were slightly less likely to be convinced by the benefits associated with the growing influence of Asia. Young people (aged under 30) were less likely to be in the 'all positive' group described above (17 percent compared with 23 percent of those aged 30 and over). As described below, young people were slightly more likely to provide consistently negative answers about the impact of Asia.

A small group of the population are consistently negative about the impact of Asia. Young people and those with a low level of connection to Asia are more likely to be in this group

Colmar Brunton conducted negativity analysis on the answers provided about the impact of Asia on New Zealand's future. This identified a minority who tended to provide consistently negative answers about the impact of tourism, economic growth, investment, culture and immigration.

In total, 13 percent provided negative answers for the majority of those questions. This was higher for the following groups of the population:

- Young people aged under 30 (17 percent, increasing to 19 percent for those aged under 25).
- Those who have never travelled to Asia (17 percent).
- Those who feel 'less warm' towards people who identify as Asian (44 percent).

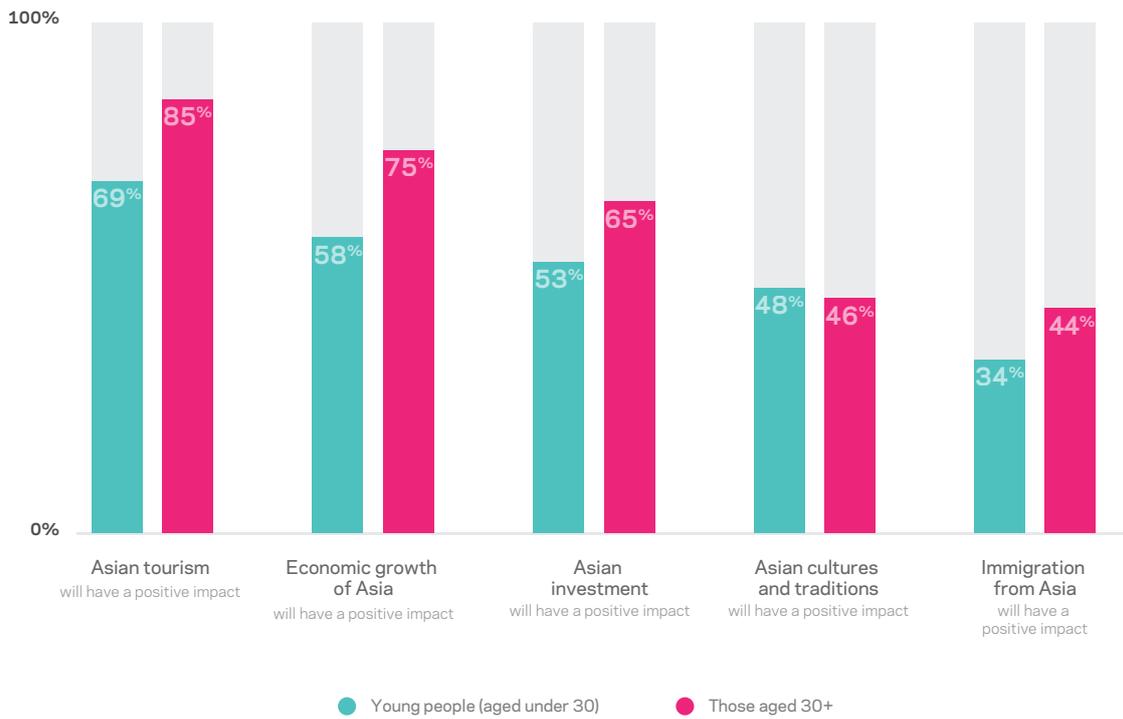
Fig.27 (right) shows young people (aged under 30) were significantly less likely than those aged 30 and over to think the economic growth of the Asian region, Asian immigration, Asian tourism and investment from Asia would have a positive impact. However, views on the impact of Asian cultures and traditions did not vary by age.

Sample sizes are too small to conduct detailed subgroup analysis within the youth segment. However, findings suggest that the following types of young people tended to only provide neutral or negative answers about the impact of Asia on New Zealand:

- Those living in Hawke's Bay or Canterbury.
- Those who have not travelled to Asia.
- Those with a low knowledge of Asia.
- Those who are personally feeling less warm towards people who identify as Asian.
- Females.

Further research with young people, possibly targeting those living outside of urban areas, is required to uncover the exact nature of concerns young people have in relation to the growth of the Asian economy.

Figure 27
Views of young people (aged under 30, compared with those aged 30+)



Source: Q2b - what kind of impact will Asia have on New Zealand in next 10-20 years?
Base: those aged 15-29 (n=455) and those aged 30+ (n=1,545), excluding those who said 'don't know' to each question.



How do New Zealanders perceive people who identify as Asian?



This section explores perceptions towards people who identify as Asian. We investigate both personal feelings and perceptions about the national sentiment. Finally, we examine reasons people feel warmer or less warm towards people who identify as Asian.

Key findings



Fifty-five percent of New Zealanders said their personal feelings towards people who identify as Asian have not changed in the past year. Among the remainder, more people said they were feeling 'warmer' (28 percent) rather than 'less warm' (14 percent).

Almost three in 10 rated the nation's feelings towards Asian people as less warm than their own feelings.

The two most common reasons for feeling warmer towards people who identify as Asian include increased contact with Asian people or with Asian culture.

Warmth towards people who identify as Asian goes hand in hand with more positive views about Asian immigration, Asian people, and Asia's contribution to the New Zealand economy.

The two most common reasons for feeling less warm towards people who identify as Asian include the perceived impact on property prices and concerns about the numbers of immigrants from Asia.

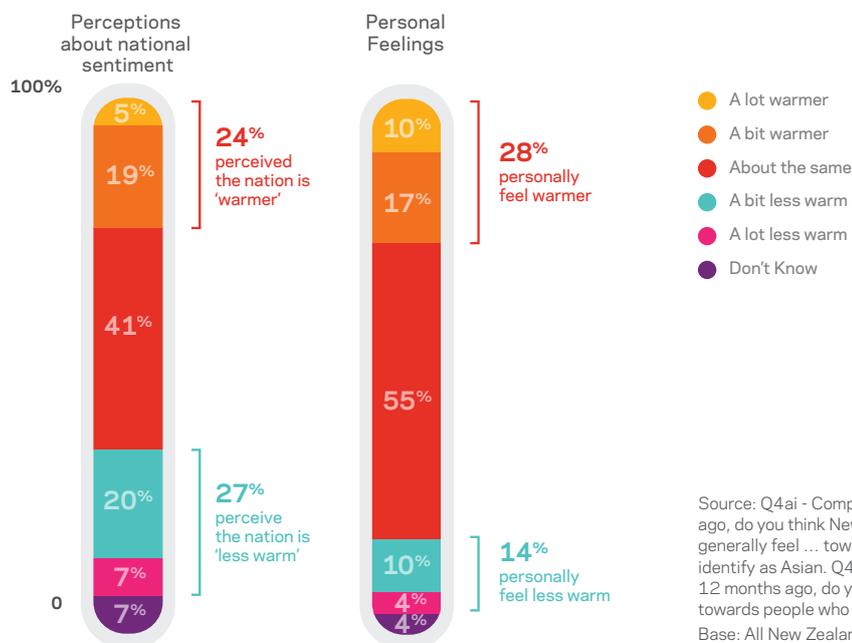
Focus Group Insights

When asked about perceptions of people who identify as Asian:

Participants with lower engagement in Asia tended to frame their answers around perceived negative impacts associated with immigration;

Participants with higher engagement in Asia tended to frame their answers in terms of the perceived benefits of living in a multicultural society with diverse skillsets.

Figure 28
Perceptions of national and personal feelings (towards people who identify as Asian) compared with a year ago



Source: Q4ai - Compared to 12 months ago, do you think New Zealanders generally feel ... towards people who identify as Asian. Q4aii - Compared to 12 months ago, do you generally feel ... towards people who identify as Asian.
 Base: All New Zealanders (n=2,000)

Most New Zealanders say their personal feelings towards people who identify as Asian have not changed in the past year

Just over half (55 percent) said their personal feelings towards people who identify as Asian have not changed in the past year. Among the remainder, more people said they were feeling 'warmer' (28 percent) rather than 'less warm' (14 percent). The remaining 4 percent were unsure.

Those who feel Asia can only have a positive impact on New Zealand's future were more likely to say they 'are feeling warmer' (45 percent). However, those who feel the impact of the Asia region on New Zealand's future is generally negative tended to say they were feeling 'less warm' (56 percent).

There was no difference between people aged under 30 and others (28 percent of people aged under 30 reported feeling warmer towards those who identify as Asian, compared with 27 percent of people aged 30 and over).

Almost three in 10 rate the nation's feelings towards Asian people as less warm than their own

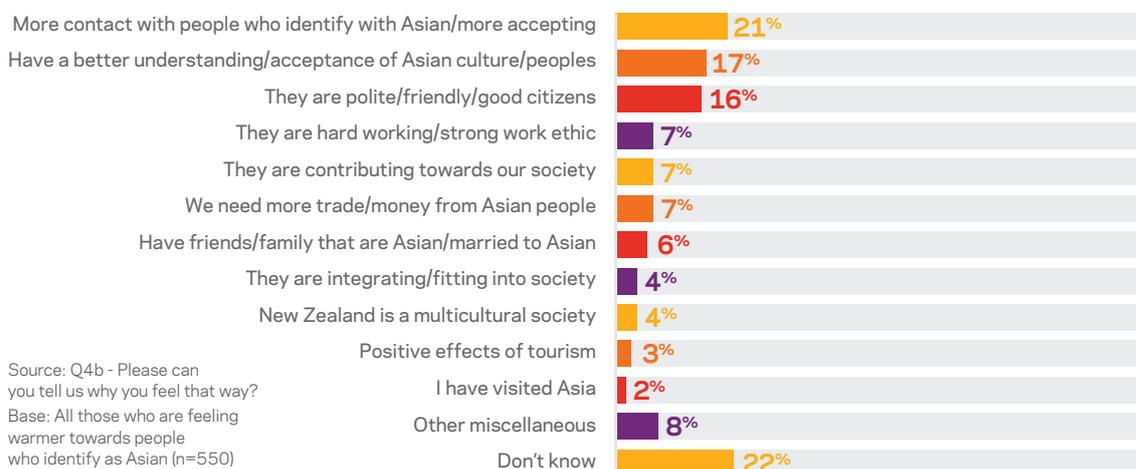
Fig.28 (above) illustrates perceptions about national sentiment alongside personal sentiment. The former shows 27 percent perceived that New Zealanders are feeling less warm towards people who identify as Asian, whereas the equivalent figure for 'personal feelings' is half this (14 percent).

It appears a sizeable group of New Zealanders can distinguish between the perceived national sentiment and their own personal feelings. In fact, almost three in 10 (29 percent) of New Zealanders provided a more negative rating about national perceptions, compared with their own personal perceptions. These respondents were slightly more likely to be in the 'high-knowledge' category - that is they scored four or more out of six on questions about Asia¹⁸. There were no other distinguishing demographic features in this group.

18 32 percent of these respondents felt that the nation had more negative feelings towards Asian people than their own. This compares with 28 percent of all respondents.

Figure 29

Reasons for feeling warmer towards people who identify as Asian



Source: Q4b - Please can you tell us why you feel that way?
Base: All those who are feeling warmer towards people who identify as Asian (n=550)

Those who are feeling warmer towards Asian people have increased their contact with Asian people or culture recently

Respondents who said they were feeling warmer towards people who identify as Asian (28 percent of the total population) were asked why they were feeling warmer. A range of answers were provided in an open-ended question and the results were categorised as shown in Fig.29 (above). The most common answers were about increased contact with Asian people (21 percent of those who are feeling warmer) or with Asian culture (17 percent).

A minority feel more negative about people who identify as Asian – they have negative views about investment, immigration and a perceived lack of social integration

Respondents who said they were feeling less warm towards people who identify as Asian (14 percent of the total population) were asked why they were feeling less warm. Answers were provided in an open-ended question and are charted in Fig.30 (overleaf). The two most common answers related to negative perceptions about the perceived

impact on property prices (27 percent), and views about the large numbers associated with immigration from Asia (23 percent). Other reasons include perceptions about a perceived lack of social integration and concerns about business investment from Asia¹⁹.

When asked about perceptions of people who identify as Asian, focus group participants with lower engagement with Asia tended to frame their answers around perceived negative impacts associated with immigration

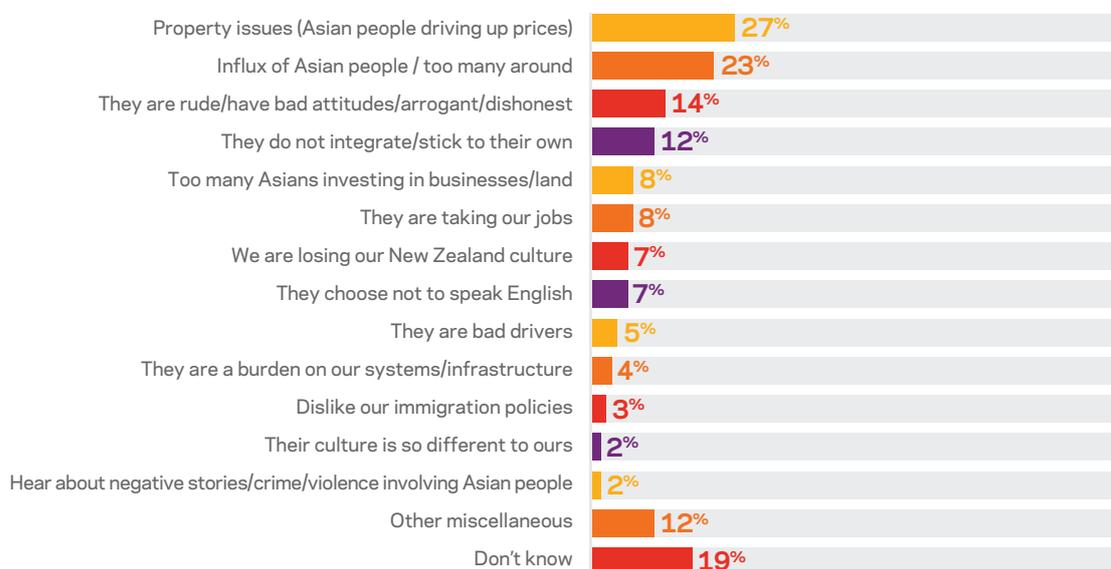
Participants expressed negative viewpoints about the impact of immigration on jobs, housing and investment. They felt the impact reduced opportunities for the current population of New Zealand.

“You can tell from the news that Asian immigration is getting out of hand. They’re pushing up our house prices and buying up land left, right and centre. We had a local dairy farm bought up by Chinese investors and they only brought in Filipino help and now you can’t get a look in.”

Female, 50-54 years, New Zealand European, Invercargill

19 As described in the knowledge section, the majority of New Zealanders incorrectly assume that most foreign investment to New Zealand comes from Asia (58 percent assume this).

Figure 30
Reasons for feeling less warm towards people who identify as Asian



Source: Q4b - Please can you tell us why you feel that way?
Base: All those who are feeling less warm towards people who identify as Asian (n=244)

"Immigration is uncontrolled. There are lots of students at the low-skilled end, but now there are also skilled workers coming from Asia at the higher end."

Male, 55-59 years, New Zealand European, Auckland

"Foreign investors are cosyng up to politicians and getting fast-tracked through the immigration system without proper checks. It feels like they're taking advantage."

Male, 25-29 years, New Zealand European, Wellington

"We see most of this loss of control already. Change in company signage. If you go to a house auction, the people who win them are Asians."

Male, 30-34 years, New Zealand European, Auckland

These viewpoints were expressed by focus group participants with lower engagement with Asia. Participants with this viewpoint also perceived a lack of social integration between people who identify as Asian and other groups of the population.

"The thing that has got to me is seeing Chinese writing in Auckland - shops, restaurants, offices - with no English, I don't feel welcome there. It makes me feel like an outsider in my own country."

Female, 60-64 years, New Zealand European, Auckland

"You go to Howick and you think you're in China."

Male, 30-34 years, Māori, Auckland

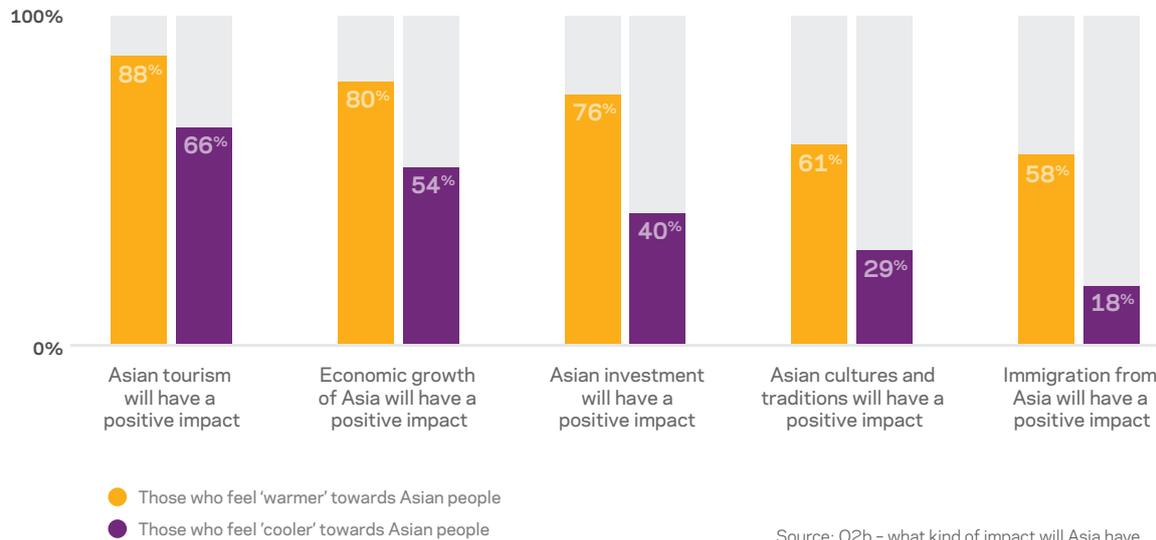
"I don't want [Asian people] doing what they do now and live in their own little groups and never try to interact with us. How will they integrate? It's on [Asian people] to live like us and talk with us in English. Not the other way around."

Female, 35-39 years, New Zealand European, Invercargill

Warmth towards people who identify as Asian goes hand in hand with more positive views about the impact of Asia on New Zealand's future

Analysis of the survey data shows warmth towards people who identify as Asian goes hand in hand with more positive views about Asian immigration, Asian people, and Asia's contribution to the New Zealand economy.

Figure 31
Views of those who are involved with Asian people/culture



Source: Q2b - what kind of impact will Asia have on New Zealand in next 10-20 years?
Base: those who feel warmer towards Asian people (n=550) and those who feel cooler towards Asian people (n=244), excluding those who said 'don't know' to each question.

Focus group participants with higher engagement in Asia tended to frame their answers in terms of the perceived benefits of living in a multicultural society with diverse skillsets

When asked about perceptions of people who identify as Asian – focus group participants with higher engagement with Asia reflected upon interactions at work and in the wider community. They felt that New Zealand benefits from increased diversity and new skillsets.

"Some of the students who come visit our school in the exchange programme; they're as bright as they come."

Female, 40-44 years, Māori, Wellington

"My team at work is pretty small, about nine or ten all up. And some of the guys are from India and China and they really know their stuff. It's impressive."

Male, 25-29 years, New Zealand European, Wellington

"People who identify as Asian are becoming an increasing part of our community. I celebrate the diversity it brings and think it might help us think more about equality regardless of identity or country of origin."

Female, 40-44 years, Māori, Auckland

"They are hard-working people and I make friends with them easier. The people I've met who identify as Asian are sometimes competitive, but in a good way which challenge me to be more proactive and have a long-term vision."

Female, 35-39 years, Pasifika, Auckland

"Generally, they have a lot to offer us in New Zealand and we should welcome the skills and culture they bring to us."

Female, 70-75 years, New Zealand European, Auckland

"I work and socialise with many Asian people and get on very well with them. We are all the same human beings with similar hopes and dreams – although we may sometimes be in different physical packaging."

Male, 40-44 years, New Zealand 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.

Since 1997 the Foundation has undertaken regular research to measure New Zealanders' perceptions of the people and countries of Asia. This is the only research focused on understanding New Zealanders' views of both the barriers to and benefits of a relationship with Asia. The research serves as a backdrop to the Foundation's policy direction and identifies priorities for building stronger relationships with Asia and for better preparing New Zealanders to engage confidently with 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 people and cultures.
- Views about investment from Asia.
- Perceived knowledge of Asia.
- Actual knowledge of Asia (tested through a series of general knowledge questions.)
- Perceived involvement with Asian people and cultures.
- Interactions with people who identify as Asian.
- Asia-related interests, including travel and attending relevant events.

Telephone surveys are less useful for testing knowledge because concepts can be difficult to explain over the phone and respondents struggle to recall all of the response options, or may be embarrassed to admit ignorance. For this reason Colmar Brunton often finds that 'don't know' options are selected more often in an online survey environment.

However, the change in method, along with a new set of questions, means there is only a limited ability to compare this survey with previous *Perceptions of Asia* surveys. Where relevant, the report provides a comparison against historic results. Our commentary includes caveats to consider when making these comparisons.

Sampling and weighting

Respondents were drawn from Colmar Brunton's online research panel - which contains 220,000 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 Colmar Brunton drew a sample which was representative by age, gender, and household size.

Some regions have very small populations (such as the West Coast). Without any adjustment at the sampling stage it might be impossible to analyse the views of more provincial regions separately.

In order to counter this (and enable regional analysis), Colmar Brunton deliberately boosted non-Auckland regions slightly within the overall

Quantitative methodology

Two thousand online surveys were completed with New Zealanders aged 15 years and over from 22 November to 13 December 2017. A survey of 2,000 people has a maximum margin of error of +/- 2.2 percentage points at the 95 percent confidence level.

Data collection method

Given the need to more robustly measure knowledge, the Foundation commissioned an online self-completion survey in 2017. This method allows for a slightly longer questionnaire (which enabled a new set of general knowledge questions) and an expansion of the overall sample-size (which enabled detailed demographic analysis, including the identification of patterns by age group).

sample. Colmar Brunton also boosted Southland slightly so that it had sufficient respondents for a focus group conducted in Invercargill.

Post-survey weighting adjusted for these deliberate regional boosts so the final sample is representative of the regional spread of New Zealanders (according to Census data from Statistics New Zealand). Final survey weighting also ensured overall results represent the adult population on age, gender, and ethnicity. The weighted and unweighted sample profiles can be found in Appendix A.

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 living in permanent private residences in New Zealand, including those who were born in New Zealand and those who were born elsewhere.
- Please note that in some places in the report two answers are combined for simplicity of reporting (for example, the answers 'somewhat important' and 'very important' are combined to become 'important' in many of the Figures). When this happens the combined answer may not add up to the sum of its parts because of rounding. For example: 32.6 percent said they knew 'a fair amount' about Asia and 10.6 percent knew 'a lot about Asia' - when combined this becomes '43.2 percent' that said they 'knew at least a fair amount about Asia'. However, in the report these three figures are rounded to 33 percent, 11 percent and 43 percent respectively although, without seeing the decimal places, the reader might expect 33 and 11 to add up to 44.

Qualitative methodology

The qualitative phase of this project was conducted via four focus groups with 26 participants which explored knowledge and attitude in more detail. Illustrative quotes from the focus groups are described throughout the report and provide the 'human context' behind the survey statistics.

The focus groups were conducted in Auckland, Wellington and Invercargill. Participants with a range of ages, ethnicities and household incomes were identified from the quantitative survey and recruited via telephone.

It should be noted that Colmar Brunton deliberately recruited people with strong engagement and weak engagement with Asia to take part in the focus groups. Colmar Brunton achieved this by segmenting the focus group participants by stated knowledge and stated involvement (as measured in the survey). Colmar Brunton aimed to recruit both those with relatively high perceived involvement (with Asian culture and with people who identify as Asian) and relatively low perceived involvement. Colmar Brunton also targeted participants based upon their self-assessed knowledge (including participants with high self-assessed knowledge and participants with low self-assessed knowledge).

Segmenting the groups in this manner allowed Colmar Brunton to draw upon a wide spectrum of viewpoints and perspectives. This provides rich context about the various influences upon perceptions but the quoted views of participants are not necessarily representative of all New Zealanders.

Focus group sessions were conducted face-to-face between 24 January and 2 February 2018, and each session lasted for two hours.

Appendix A: Survey sample profiles

Gender and age

Gender	Unweighted percent (n=2,000)	Weighted percent (n=2,000)
Male	46%	48%
Female	53%	52%
Gender diverse	<1%	<1%

Age	Unweighted percent (n=2,000)	Weighted percent (n=1,000)
Under 30 years	23%	25%
30-39 years	17%	16%
40-49 years	18%	18%
50-59 years	18%	17%
60-69 years	13%	12%
70+	12%	11%

Ethnic identification

	Unweighted percent (n=2,000)	Weighted percent (n=2,000)
New Zealand European	76%	75%
New Zealand Māori	13%	12%
Pacific	7%	6%
Asian	11%	12%
Non-New Zealand European	3%	4%
Other	2%	2%

Location

	Unweighted percent (n=2,000)	Weighted percent (n=2,000)
Northland	3%	3%
Auckland	16%	33%
Waikato	11%	9%
Bay of Plenty	6%	6%
Gisborne	2%	1%
Hawke's Bay	4%	3%
Taranaki	3%	2%
Manawatu-Wanganui	7%	5%
Wellington	12%	11%
Tasman	3%	1%
Nelson	3%	1%
Marlborough	3%	1%
West Coast	2%	1%
Canterbury	13%	13%
Otago	7%	5%
Southland	7%	2%

Source: Q21a, Q21b, Q21bii, Q21c Base: All New Zealanders (n=1,000)

Appendix B: Qualitative forum profile

Gender

Female	13
Male	13
Total	26

Self-assessed knowledge of Asia

Almost nothing or a little	12
A fair amount or a lot	14
Total	26

Age

Under 30	4
30-39	6
40-49	10
50-59	4
60+	2
Total	26

Involvement with Asian culture/people who identify as Asian

Hardly anything or not much	12
A fair amount or a lot	14
Total	26

Ethnic identification (some chose more than one)

New Zealand European	15
Māori	5
Asian	6
Other (inc other European and Pacific)	3
Total	29

Asia New Zealand Foundation

The Asia New Zealand Foundation 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 rely on a mix of public, philanthropic and corporate funding.

With staff in Auckland and Wellington, the Foundation is overseen by a board of trustees drawn from business, community, academic and leadership backgrounds.

We are supported by a panel of honorary advisers from across Asia and New Zealand. This group comprises leading academics, business people and current and former politicians and diplomats.

The Foundation works 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 seven programmes.

If you would like to know more about the Asia New Zealand Foundation's activities, visit our website or join the conversation on Twitter, Facebook or LinkedIn.

Asia New Zealand Foundation

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