

NEW ZEALANDERS' PERCEPTIONS OF ASIA AND ASIAN PEOPLES

2022
ANNUAL
SURVEY

 Asia New Zealand
Foundation
Te Whītau Tūhono



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Comment from the Executive Director

This year's *Perceptions of Asia* report shows that New Zealanders want to see more energy and resources put into growing New Zealand's cultural, economic, and political relationships with Asia.

At the Foundation, we have been concerned that the covid-19 pandemic, heightened global geopolitical tensions, and a more challenging economic environment would see New Zealanders losing enthusiasm for strengthening our connections to Asia.

In fact, the opposite appears to be true. In 2022, 80 percent of New Zealanders said that developing political, social and economic ties with Asia is important for New Zealand's future, an increase on 2021 and a significant rise from the 2019 survey figure (67 percent). As well as seeing Asia as critical to our future, a significant majority of New Zealanders (65 percent) feel that it is more important for New Zealand to invest energy and resources into building partnerships with Asia than it was five years ago.

Most New Zealanders (88 percent) also see value in New Zealand having a long-term vision and plan for growing such partnerships. Over the past year the Foundation's *Seriously Asia Revisited* work has looked at how far New Zealand has come with Asia over the past twenty years and what we need to do going forward to position New Zealand for success.

Improving New Zealand's 'Asia capabilities', or knowledge levels, cultural understanding and language skills will be critical to achieving progress. The research presented in this report highlights New Zealand's Asia knowledge gap: while New Zealanders know that Asia is critical for New Zealand's future many still don't know as much about the region as they do about North America, Europe and the Pacific. While Asia knowledge levels have trended upwards over the past decade, there is significant scope to improve how much New Zealanders know about the world's most dynamic region.



Our research has consistently told us that knowledge of and experience with Asia and Asian peoples goes hand in hand with more positive attitudes towards Asia. Happily, *Perceptions of Asia* also confirms that New Zealanders are up for learning more about Asia and want more opportunities for connection. Our report shows the community is supportive of increasing people-to-people links with Asia, connecting through culture and sport, and learning about Asia in our schools and universities. These findings will inform our work over the next year as we work to equip New Zealanders to thrive in Asia.

On the whole New Zealanders feel warmer to many countries in Asia than they did in 2021. Sentiment towards China had decreased in the Foundation's June 2022 snap 'mini-poll'. In this latest survey sentiment towards China has lifted back to 2021 survey levels.

New Zealanders understand that Asia is an immense region within which a complex set of political, economic, security and social dynamics are playing out at any given time. As with last year's report, we have asked New Zealanders for their views on political and security developments in Asia. Our results tell us that New Zealanders are alert to geopolitical developments in Asia, with many New Zealanders concerned about the possibility of great-power conflict over Taiwan. Our report shines a light on New Zealand community perspectives on increasing tensions in the Taiwan Strait.

Perceptions of Asia, now in its 26th year, shows a strong desire from New Zealanders for their country to continue to invest and grow connections to Asia. The findings will certainly inform the Foundation's work over the coming year. We trust others will find this report a useful resource for their own mahi.

Simon J Draper

Executive Director
Asia New Zealand Foundation
Te Whītau Tūhono

“The need to be closer to Asia has definitely increased. Asia is quite an innovative [region] and we’re realising more and more how important it is for us to connect, to share ideas, to find solutions, and to diversify where we’re getting our products from.”

INTRODUCTION



Our approach

The *New Zealanders' Perceptions of Asia and Asian Peoples* survey has become an important annual reference point on New Zealand's engagement with Asia. Now in its 26th year, the survey provides New Zealand's research and international affairs community, media, government officials, and public with annual insights into New Zealanders' connections to and perceptions of Asia. The survey informs both New Zealand public discourse on Asia and the Foundation's plan of work to equip New Zealanders to thrive in Asia.

While taking care to maintain the longitudinal nature of the survey, we have evolved the questionnaire to gain greater insight into New Zealanders' perceptions of geopolitical developments in Asia and to gauge New Zealanders' interests and priorities across the region. The findings generated from these newer questions are relevant for a range of sectors in New Zealand, and for New Zealand decision-makers who are shaping the future of New Zealand-Asia relations. These findings also allows for international comparison, illuminating how New Zealand's regional outlook accords with or differs from our partners.

This report presents the results from a survey of 2,323 New Zealanders aged 15 years and over conducted from 4 to 30 November 2022. The survey results have been weighted so that they are representative of New Zealanders by age, gender, ethnicity and geography. To provide additional insights, a series of qualitative focus groups were also held between 15 and 25 November 2022. A description of sample composition and methodology for the 2022 survey is found on page 68.

Changes to the questionnaire

This year's survey includes several new questions that offer a deeper understanding of New Zealanders' perception of the following:

- The relative importance of different Asian countries to New Zealand's future.
- The importance of New Zealand building partnerships with Asian countries.
- Priorities for New Zealand's international relations and diplomacy.
- The importance of New Zealand having a modern defence force that is ready and able to operate effectively, including in and with Asia.
- Levels of concern over the possibility of military conflict in Taiwan.
- The importance of teaching New Zealand students about Asia in schools and universities.
- The importance of the New Zealand government having a long-term vision and plan for growing New Zealand's relationship with Asia.
- Whether events related to Asian countries should receive more coverage in the New Zealand media.

These are in addition to minor changes and improvements to the survey questions and response options after a review of the 2021 results.

Qualitative insights

The quotes used throughout this report are taken from four qualitative focus groups that were held concurrently to the quantitative survey fieldwork. Quotes from focus group participants are featured across the report to compliment quantitative findings. In the qualitative discussions, we explored:

- The security and defence context of Asia.
- How New Zealand can grow its connections and realise its potential in Asia.
- General knowledge and interest levels in Asia.
- Everyday lived experiences of engaging/connecting with Asia.

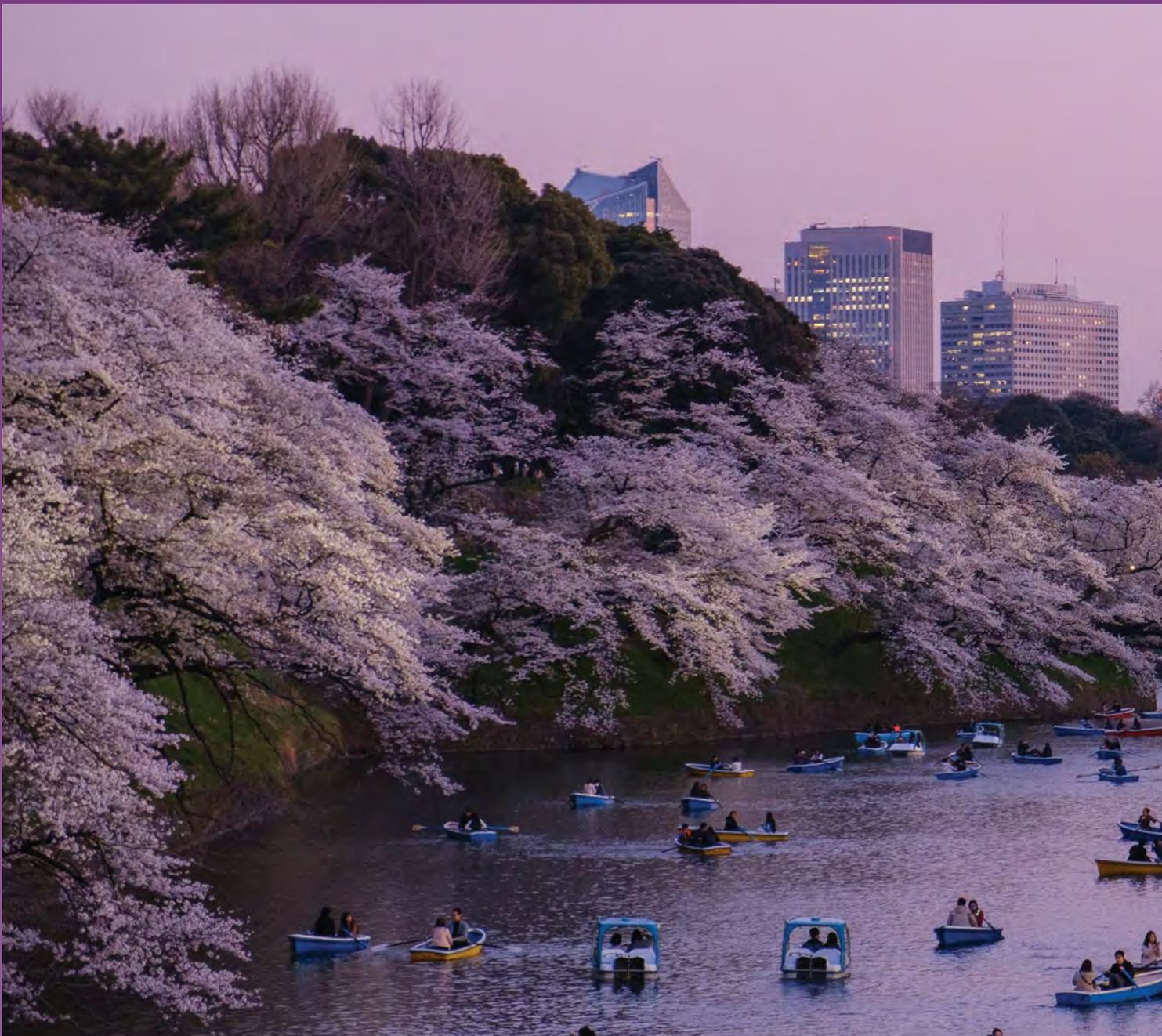
The focus groups aimed to provide a snapshot of views across New Zealand's population, including illuminating the views and experiences of New Zealanders of Taiwanese heritage. More details of the qualitative research are included in the methodology section of the report (see page 69).

Context for the survey

Survey and focus group responses are inevitably influenced by events happening at the time of fieldwork. The following topics, issues and media reports occurred around the time the survey and focus group research was undertaken and may have impacted New Zealanders' perceptions and responses:

- The ongoing coverage of Russia's invasion of Ukraine.
- North Korea's launch of ballistic missiles into the Sea of Japan and the Yellow Sea.
- In November 2022, Prime Minister Jacinda Ardern made an official visit to Viet Nam and attended both the East Asia Summit in Cambodia and an APEC leaders meeting in Thailand.
- Indonesia hosted the G20 summit in Bali during November 2022.
- The ongoing media coverage of covid-19 lockdowns in China.
- The 2022 Malaysian general election held on Saturday 19 November 2022.
- The Australian Parliament's ratification of a free trade agreement with India on 29 November 2022.

Asia outlook



1



“In terms of importance, I think it’s really important, that we Kiwis become Asia savvy. It would be great if more New Zealand schools offered Asian languages as an option. That would be great not just for our economic prosperity, but in terms of new generations of Kiwis because they are so diverse.”

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

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



Key findings



Eighty percent of New Zealanders see developing ties with Asia as an important priority for New Zealand.

Asia continues to be considered the second-most important region for New Zealand's future. Southeast Asia and South Asia are increasingly seen as important sub-regions to engage with.

China, Japan, Singapore, India, South Korea, and Malaysia are top of mind for New Zealanders when asked which countries in Asia will be important for New Zealand's future.

Growing ties with Asia: more important than ever

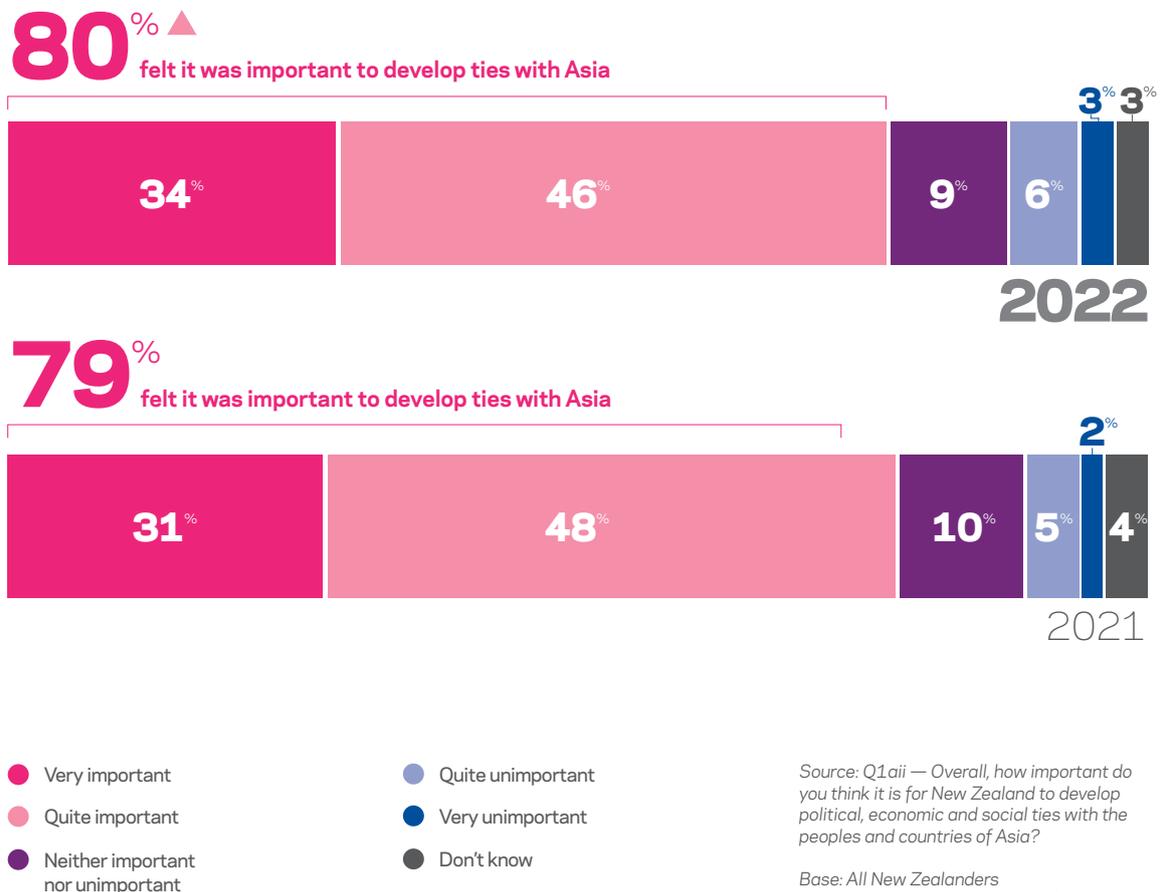
Four in five New Zealanders (80 percent) believe that it is important to develop political, economic and social ties with Asia (see figure 1). This has increased slightly from 2021 (79 percent) and substantially from 2019 (67 percent) when the question was first introduced to the survey.

We observe that for New Zealanders under 30, the importance of developing ties with Asia has increased by 12 percentage points in two years, from 68 percent in the 2020 survey to 80 percent in 2022.

Regionally, respondents from Auckland (83 percent), Wellington (82 percent), Otago (81 percent), and Bay of Plenty (81 percent) are more likely to perceive developing political, economic and social ties with Asia to be important. Respondents from Southland (69 percent) remain the least likely to perceive developing ties as important, however this result has shifted upward from the 2021 survey (66 percent).

Figure 1

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



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

New Zealanders continue to consider Asia the second-most important region to New Zealand's future, after Australia (see figure 2). This has been a consistent result since the introduction of the question to the survey in 2017. In 2022, seventy-two percent of New Zealanders view Asia as important or very important to New Zealand, in line with 2021 survey (73 percent).

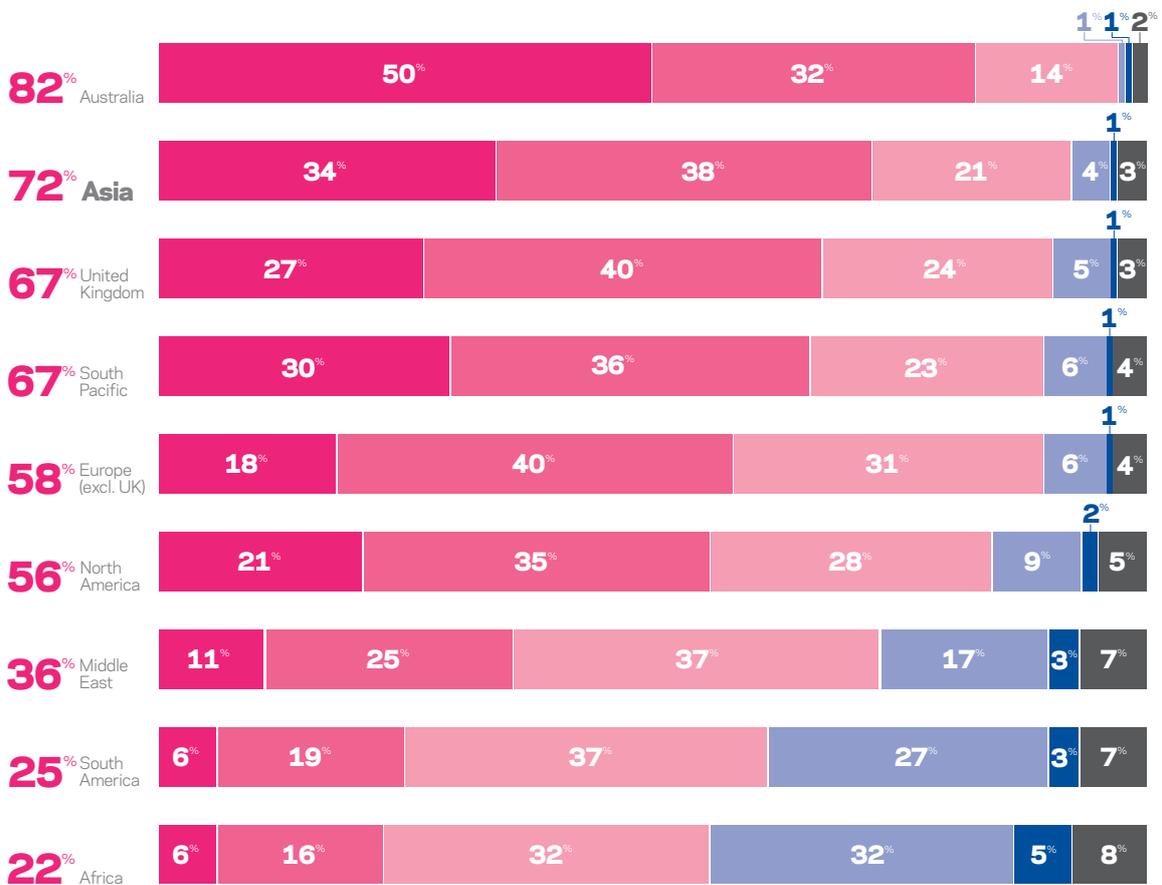
“When I look forward to New Zealand’s future, I look to the West and Australia, maybe parts of the Pacific. But when you look at it, the growth will come from Asia, because the rest of those economies are becoming stagnant. The key is really New Zealand reaching out to the rest of the world, rather than playing a one-sided game. I would prefer that they really expand into Asia, and other markets as well.”

40-49 years, Male, Indian heritage, Auckland

Figure 2

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

Percentage of people who felt the region was important



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

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

Base: All New Zealanders (n=2,323)

New Zealanders increasingly see Southeast Asia and South Asia as important sub-regions

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

We examined three main sub-regions:

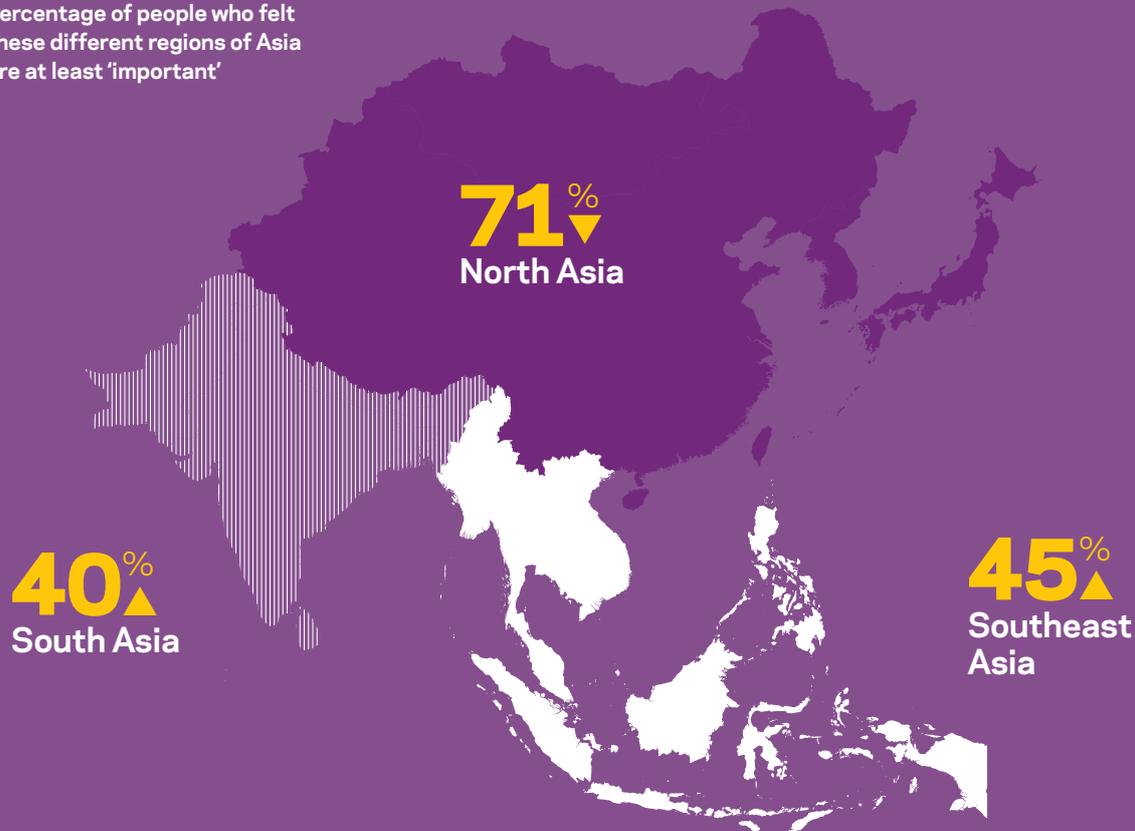
- North Asia (including countries such as China, Japan and South Korea);
- South Asia (including countries such as India, Sri Lanka and Bangladesh); and
- Southeast Asia (including countries such as Singapore, Thailand and Malaysia).

Seventy-one percent of New Zealanders said North Asia was important to New Zealand's future, down slightly from 74 percent in 2021. New Zealanders' perception of the importance Southeast Asia and South Asia has increased over time. Forty-five percent of New Zealanders rated Southeast Asia to be important to New Zealand's future, up from 44 percent in 2021 and 42 percent in 2020. South Asia is perceived to be important by 40 percent of New Zealanders, up from 39 percent in 2021 and 37 percent in 2020.

Figure 3

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

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



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

Base: All New Zealanders (n=2,323)

A range of countries across Asia are perceived to be important for New Zealand's future

For the first time we asked New Zealanders to identify which countries in Asia they consider to be most important to New Zealand's future (see figure 4).

In response, New Zealanders rated China (72 percent), Japan (66 percent), Singapore (53 percent), India (52 percent) and South Korea (48 percent) to be the top five most important Asian countries for New Zealand's future. These countries were followed by Malaysia (35 percent), the Philippines (35 percent), Thailand (34 percent), Indonesia (32 percent) and Vietnam (28 percent).

72%
China



53%
Singapore



52%
India



66%
Japan



48%
South Korea

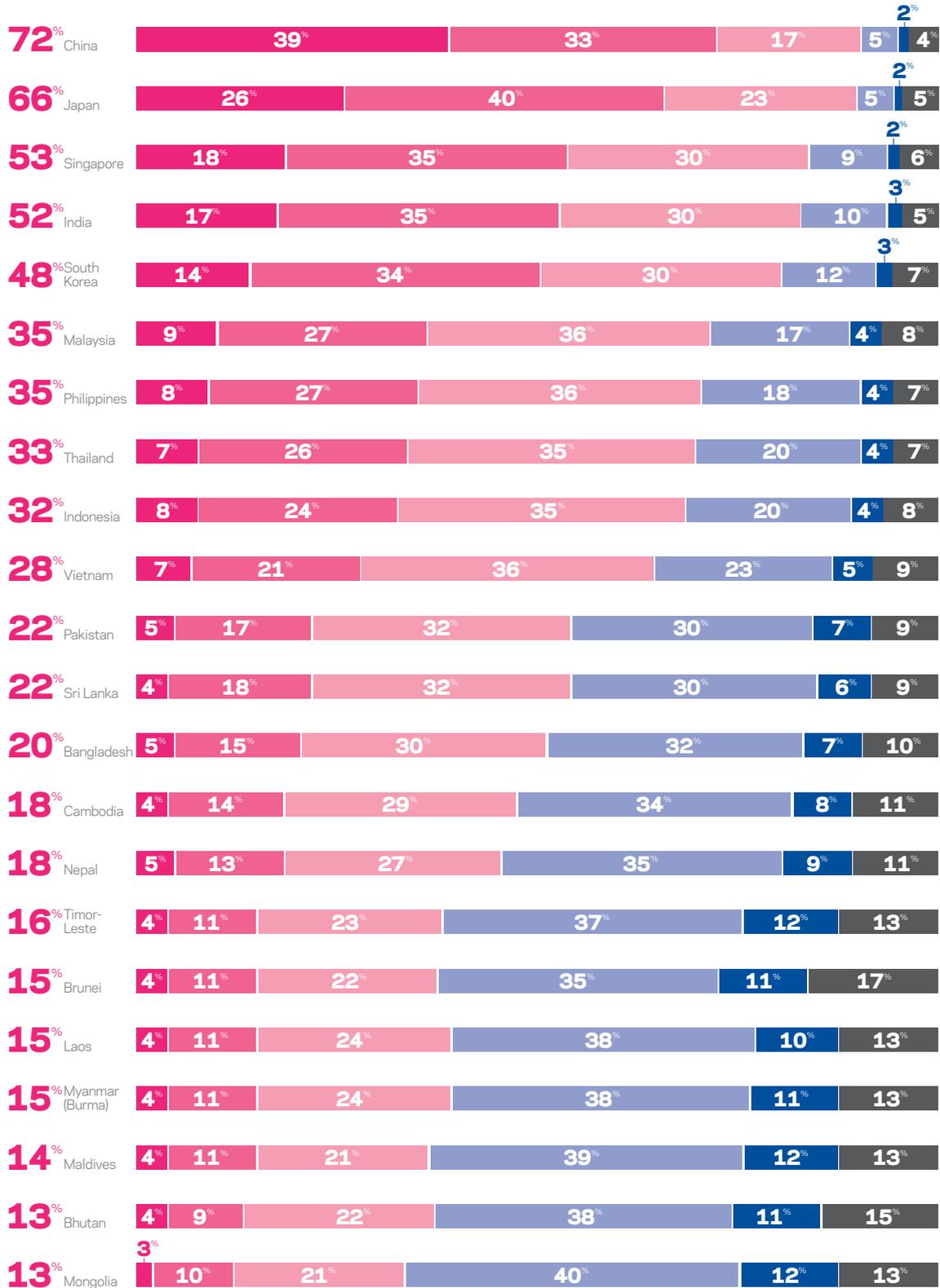


“The values in the Philippines align with [New Zealand] really nicely. They are hardworking as are most Kiwis. They’ve got a really good attitude to family, family is important to them, and within New Zealand family is important. So their values and their cultural principles really align well with New Zealand’s I’d say.”

Figure 4

How important are individual countries in Asia to New Zealand's future?

Percentage of people who felt each country was important.



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

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

Base: All New Zealanders (n=2,323)

“I think it’s important to develop a relationship with all our neighbours just to be on good terms. But if anything should happen to us, I’d like to think that we’ve got some kind of support. And I mean that in terms of a natural disaster or something like that.”

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

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



Key findings



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

New Zealanders feel warmer towards many Asian nations than they did in 2021. The perceived friendliness of South Korea, the Philippines, and Indonesia is up from previous years.

Perceptions of China have returned to 2021 levels, following an increase in threat perception recorded in the Foundation's June 2022 mini-poll.

Russia and North Korea continue to be perceived as threats.

Climate change, the impact of disinformation and global economic instability are top concerns for New Zealanders.

A majority of New Zealanders consider Japan to be a 'major power' that acts responsibly in the world.

A majority of New Zealanders are concerned about the potential for conflict over Taiwan.

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

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

New Zealanders feel warmer towards many countries in Asia than they did in 2021.

There has been a general increase in the perceived friendliness of countries in Asia towards New Zealand over the past year. Some countries have seen a significant increase in their perceived friendliness to New Zealand in 2022 including:

South Korea: 54 percent consider South Korea to be friendly towards New Zealand, up from 49 percent in 2021 and 47 percent in 2019.

The Philippines: 52 percent consider the Philippines to be friendly towards New Zealand, up from 44 percent in 2021 and 39 percent in 2019.

Indonesia: 38 percent consider Indonesia to be friendly towards New Zealand, up from 33 percent in 2021 and 30 percent in 2019.

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

New Zealanders continue to see Japan as the friendliest nation in Asia, with 72 percent rating Japan as a friend (up from 68 percent in 2021). Singapore (67 percent) and South Korea (54 percent) round out the top three Asian countries rated friendliest towards New Zealand. This order is unchanged from 2021.

Australia remains New Zealand's closest friend

New Zealanders continue to see Australia as New Zealand's closest friend, a consistent finding in the survey. Eighty-eight percent of New Zealanders consider Australia to be friendly towards New Zealand (up four percentage points from 2021). Also in the top three are the United Kingdom (85 percent) and Canada (81 percent).

The United States perceived to be more friendly towards New Zealand in 2022.

Sixty-five percent of New Zealanders consider the United States to be friendly towards New Zealand, up four percentage points from 2021 and a significant fifteen percentage point jump from 2020.

Sentiment on China has returned to 2021 levels following a sharp decline in 2022.

Thirty percent of New Zealanders view China as friendly towards New Zealand - a figure largely unchanged from 2021 results (29 percent). Thirty-seven percent consider China to be threatening. While more New Zealanders overall consider China to be 'threatening' than 'friendly', the 2022 survey results represent a warming of sentiment towards China when compared to the findings of the Foundation's additional 'mini-poll' conducted in June 2022.

In that poll, 13 percent of New Zealanders said they considered China to be friendly towards New Zealand, while 58 percent considered China threatening. For more information about the methodology of the June 2022 mini-poll see page 69.

Russia and North Korea are considered the most threatening countries.

Seventy-two percent of New Zealanders consider Russia to be threatening, up from 45 percent in 2021. The significant shift in sentiment follows Russia's invasion of Ukraine in 2022. North Korea is rated as a threat by 69 percent of New Zealanders, an increase of five percentage points from 2021.

Pakistan is also viewed as less threatening in 2022 (19 percent) compared to 2021 (28 percent).

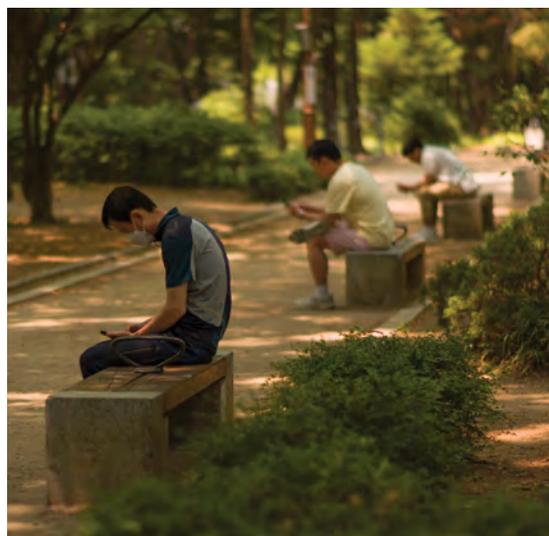
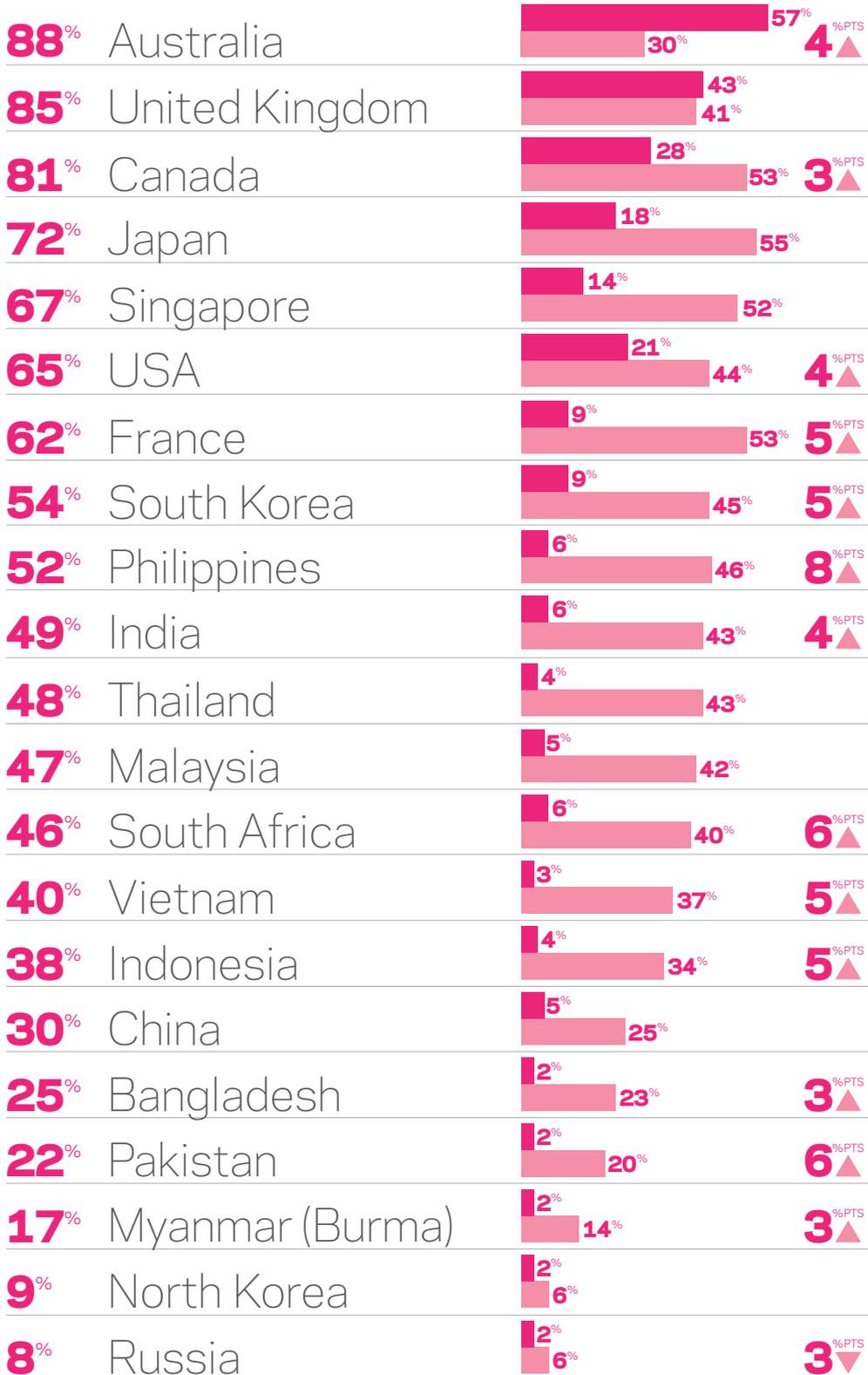


Figure 5

Which countries are friends to New Zealand?

Percentage of New Zealanders who identify each country as a friend

● Close friend ▲ Significantly higher/lower than 2021
● Friend



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

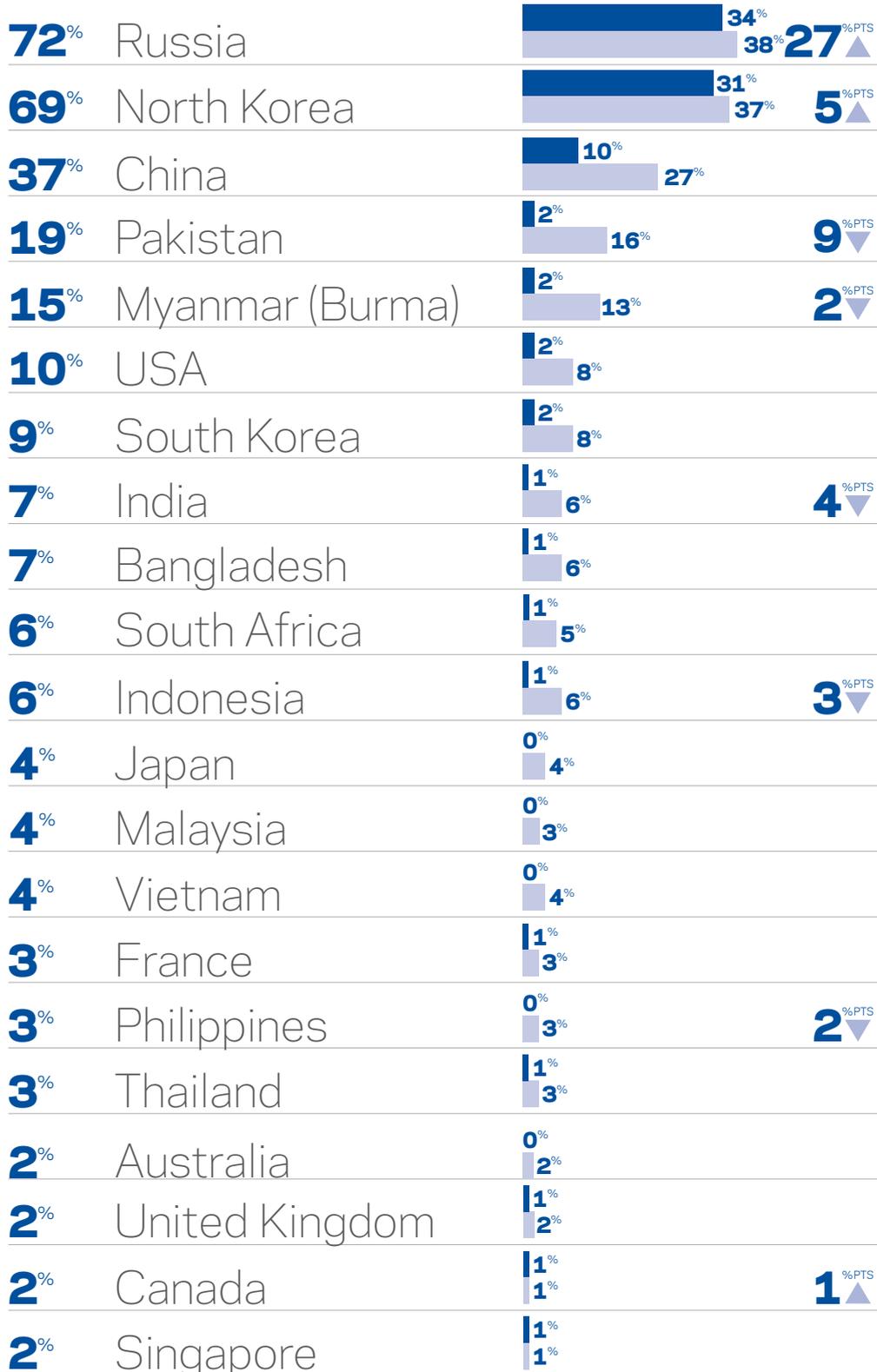
Base: All New Zealanders (n=2,323)

Figure 6

Which countries are threats to New Zealand?

Percentage of New Zealanders who identify each country as a threat

● Major threat ▲ Significantly higher/lower than 2021
● Threat



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

Base: All New Zealanders (n=2,323)

Trust in major powers

We asked New Zealanders about their level of trust in major powers to act responsibly in the world (see figure 7). Consistent with the 2021 survey, the United Kingdom (64 percent) and Japan (56 percent) are perceived to be the most responsible major powers in 2022. New Zealanders over the age of 60 are most likely to express high trust in the United Kingdom (81 percent) in contrast to New Zealanders under the age of 30 (56 percent).

More New Zealanders express trust in the United States to act responsibly in the world in 2022 than in 2021. Forty percent of New Zealanders express trust in the United States, up from 34 percent in 2021.

There was a small increase in trust ratings for India (19 percent) and China (13 percent), both increasing three percentage from the 2021 survey.

In 2022, we included Indonesia in the survey questionnaire. While fifteen percent of New Zealanders expressed trust in Indonesia to act responsibly in the world, the majority of respondents (57 percent) felt neutral.

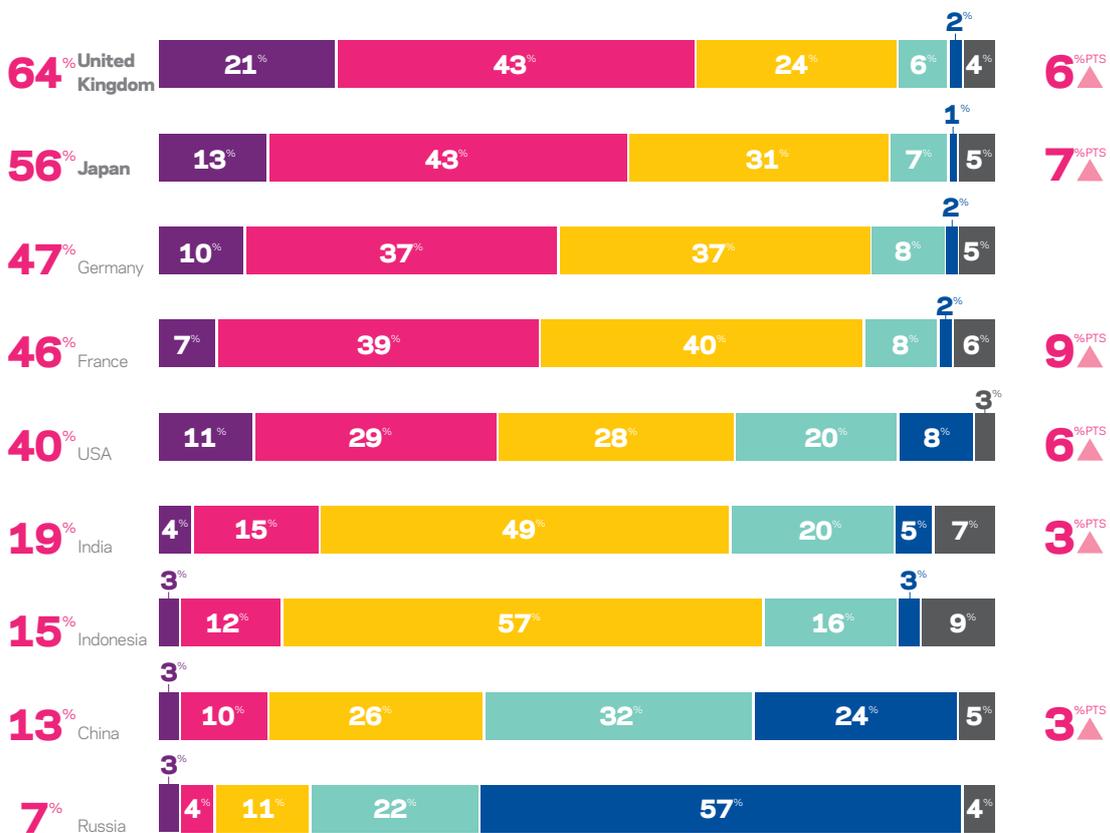
New Zealanders express the least confidence in Russia to act responsibly in the world, with 79 percent expressing a lack of trust.

For comparison, we also asked New Zealanders about their level of confidence in Australia to act responsibly in the world. Seventy-one percent of New Zealanders trust Australia to act in a responsible manner — equal to that of the United Kingdom.

Figure 7

Trust in major powers

Percentage of New Zealanders who express high trust in the following major power



- Very high trust
- High trust
- Neutral
- Low trust
- Very low trust
- Don't know

Source: Q40 — How much trust do you have in the following major powers to act responsibly in the world?

Base: All New Zealanders (n=2,323)

Threats to New Zealand's vital interests over the coming decade

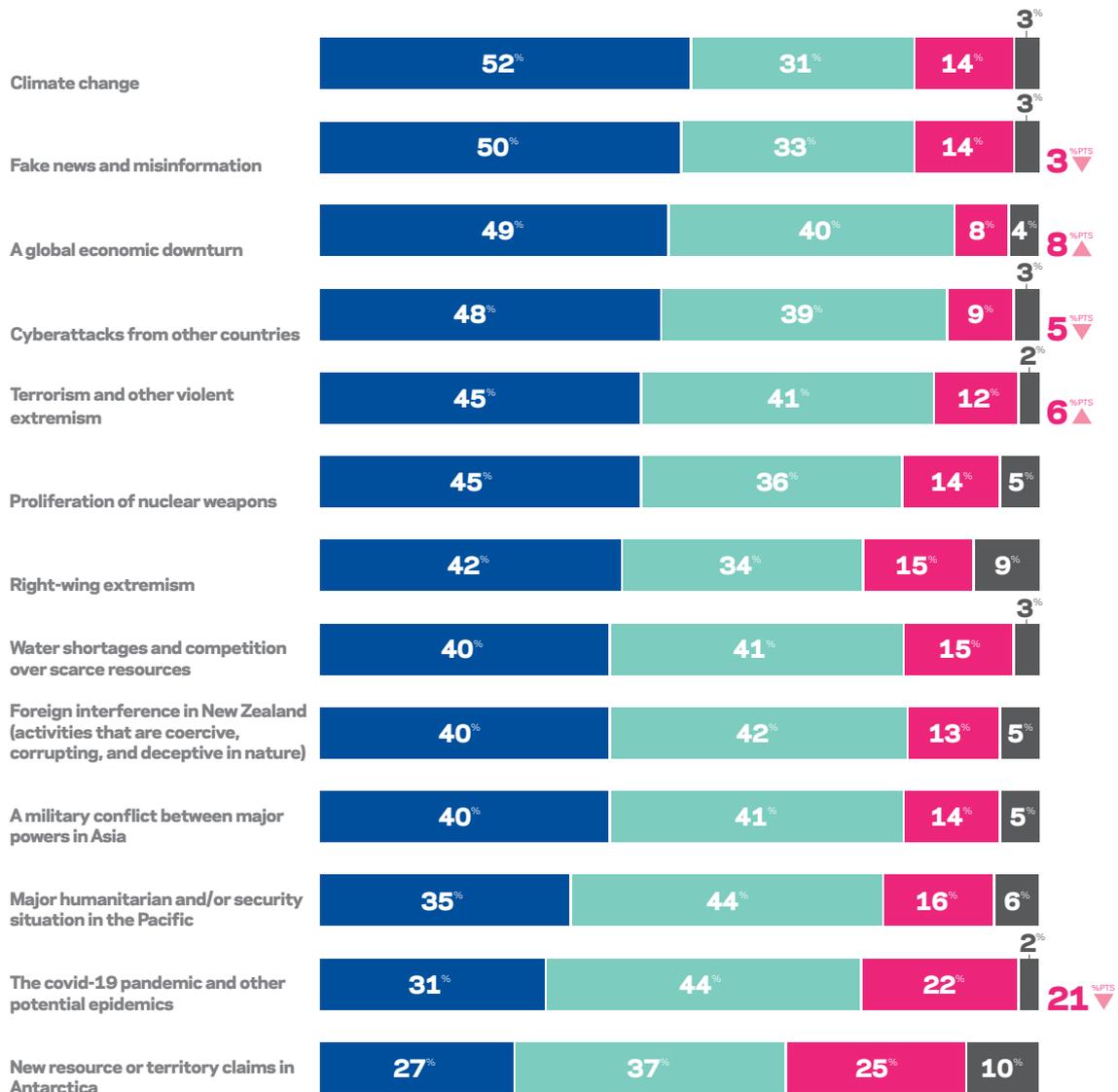
We asked New Zealanders about their level of concern relating to possible threats to New Zealand's vital interests over the coming decade, on a scale of high (10) to low (1) concern (see figure 8). These concerns were not specific to Asia.

'Non-traditional' security threats and the state of the global economy are top of mind for New Zealanders, with the impacts of climate

change, disinformation/'fake news', and fragile global economic conditions of highest concern (see figure 8). Potential cyberattacks, terrorism/violent extremism, and proliferation of nuclear weapons also register as concerning threats for New Zealanders. Concern over the covid-19 pandemic and other potential pandemics declined significantly between 2021 and 2022, falling 21 percentage points.

Figure 8

Concern over potential threats to New Zealand's vital interests



● High concern (8-10) ● Low concern (0-4)
● Medium concern (5-7) ● Don't know
▲ Significantly higher/lower than 2021

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

Base: All New Zealanders (n=2,323)

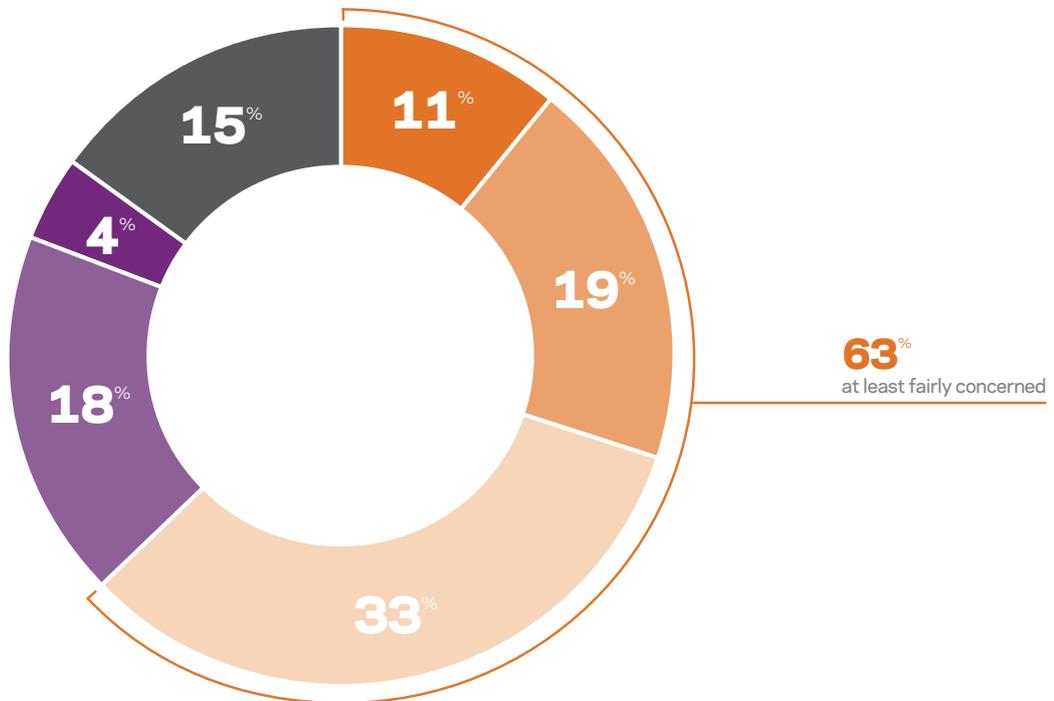
Level of concern regarding a potential military conflict over Taiwan

The security environment in the Taiwan Strait and rising great power tensions commanded global attention in 2022. For the 2022 survey, we asked New Zealanders about their level of concern regarding a potential military conflict over Taiwan (see figure 9). Nearly two-thirds of New Zealanders (63 percent) are at least 'fairly concerned' about the possibility of conflict, with 30 percent of New Zealanders 'very' or 'extremely' concerned.



Figure 9

Concern about the possibility of a military conflict over Taiwan



- Extremely concerned
- Very concerned
- Fairly concerned
- Not very concerned
- Not at all concerned
- Don't know

Q58 — How concerned, if at all, are you about the possibility of a military conflict over Taiwan?

Base: All New Zealanders (n=2,323)



Rising tensions in the Taiwan Strait: Perceptions of New Zealanders, including those of Taiwanese heritage

Through focus group research, we brought together a number of New Zealanders, including those of Taiwanese heritage, to hear their thoughts and perceptions on rising tensions in the Taiwan Strait. We wanted to hear their views on local and international media coverage and whether it matched their assessment of what was happening on the ground. We also wanted to hear their thoughts on how a potential conflict could impact them and wider New Zealand (see page 28).

Several themes emerged through the focus group conversations. One was a clear concern that New Zealand media was not covering developments in Taiwan enough and therefore New Zealanders were not sufficiently aware of the potential impact conflict over Taiwan could have on the Taiwanese people, and on regional security and stability more broadly. There was also a concern that some international media coverage exacerbated tensions by framing conflict as unavoidable and inevitable.

There was concern from New Zealanders of Taiwanese heritage about the direct impact a potential conflict may have on family and friends in Taiwan, and on their ensuing loss of civil and political rights. Most felt, however, that New Zealand's own economic and security interests would shape how New Zealand may respond rather than a human rights-based response.

We share a selection of what New Zealanders of Taiwanese heritage told us over the following page.

On media:

“Some people see it [the situation in Taiwan] as not great and some people see it as just fine. It’s because it depends on the media. Some media will show that China has this ability to conquer Taiwan in few weeks and that’s when people get really concerned. My parents are in Taiwan...they are also concerned. There’s other media that goes into in-depth analysis, a bit more on the military possibility, that sort of thing. And then they’ll say, fear not, China wouldn’t do it just yet because they cannot do it... I think the media also plays a big part of stirring things up in this situation.”

“New Zealand [media] doesn’t cover anything about Taiwan. For me, it [news and updates] will be all coming from the online media, and Chinese and US media.”

On conflict:

“I have to be honest, you know. I think it [China Taiwan conflict] will happen. But I hope not. I think China’s just too ambitious. They’ve gone too far. I think at the moment, our [Taiwanese] capability is not there yet which is sad to say. In terms of regular civilians, I don’t think we understand what a war looks like, we would like to believe we are ready, but I don’t think we are.”

“I’m seeing and hearing a lot about China keeping a real close eye on Russia in terms of what happens with Ukraine, in terms of their own little thing with Taiwan... and just seeing how far they will be able to push. As well as the recent protests in Hong Kong and the way they [China] treated them.”

“This is quite a touchy subject for Taiwanese people, just because of the complexity of the situation, and even within Taiwan [it] is different, there are different voices...some people say it [Russia’s invasion of Ukraine] helps Taiwan to see what it needs to do. If Taiwan is not united, there’s no way for them to stand and to defend themselves.”

On Taiwan’s status:

“We [Taiwan] have to get all these countries on board to recognise us independently, and we have to declare independence ourselves. We cannot keep relying on New Zealand. But I think at the end of the day New Zealand will just do whatever Australia does. They will. [NZ] will be dragged into war if Australia is in it. If Australia’s not in it, New Zealand is not in it. So whatever Australia’s doing, we’re part of it.”

“Even New Zealand has agreed to the One China policy...there’s only a handful of countries right now that recognise Taiwan as an official government. So that’s the tricky situation. Even though Taiwan is a self-running nation, even the UN doesn’t recognise us [Taiwan]. That’s where the trickiness comes in.”

New Zealanders of non-Taiwanese heritage shared some of the following observations

“...China is trying to claim territory, outside of their own territory, and Taiwan kind of wants to be independent. [The] Aussies have firmly jumped in and kind of said that they’re not having a bar of it. But if it kind of heads down that pathway [to conflict] I feel like New Zealand’s going to have no choice. And I feel our relationship with China’s probably on thin ice, but at least for now it’s all nice.”

“ I think there’s a pretty clear message from Taiwan that they want to be independent. But China is definitely saying...it doesn’t matter what you want. I guess that’s a little bit of a hint.”

“ I only learned recently that [Taiwan] is not its own country. I always thought that Taiwan was.”

“ I guess we also don’t know what China’s after, like, if they’re looking to build a defensible buffer, in the Pacific and around, so they can do what they want — which might include taking Taiwan. They [China] might just want to be the all-powerful Chinese Empire that they once were, which is also pretty bad. I don’t know if there is some evil plotting to take over the Pacific — I feel like it’s more a means to an end.”

“Our isolation no longer protects us from the reality of what might be happening elsewhere in the world...”

WHAT SHOULD NEW ZEALAND'S FOREIGN POLICY PRIORITIES IN ASIA BE?

This section looks at New Zealanders' awareness and perception of foreign policy issues and priorities for New Zealand in Asia including views on New Zealand's diplomatic priorities and defence and security connections in the region.



Key findings



A majority of New Zealanders believe it is more important to invest energy and resources into building partnerships with Asian countries in 2022 than it was five years ago.

New Zealanders see potential for enhancing relations with a range of countries in Asia including China, India and Japan. Trade, technology, and tourism are identified as key priorities.

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

Having a modern defence force able to operate effectively internationally is considered important for New Zealand.

New Zealanders have a range of views on what New Zealand's diplomatic priorities should be for the year ahead.

Importance of building partnerships in Asia

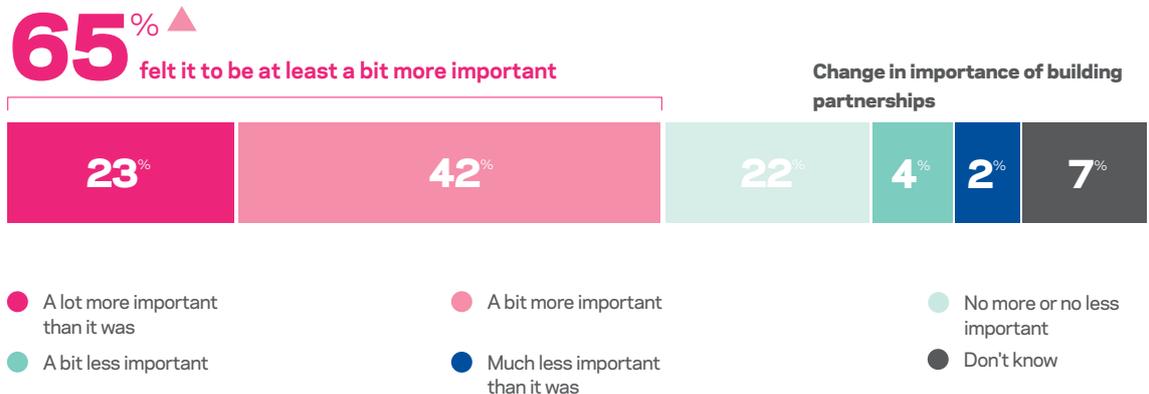
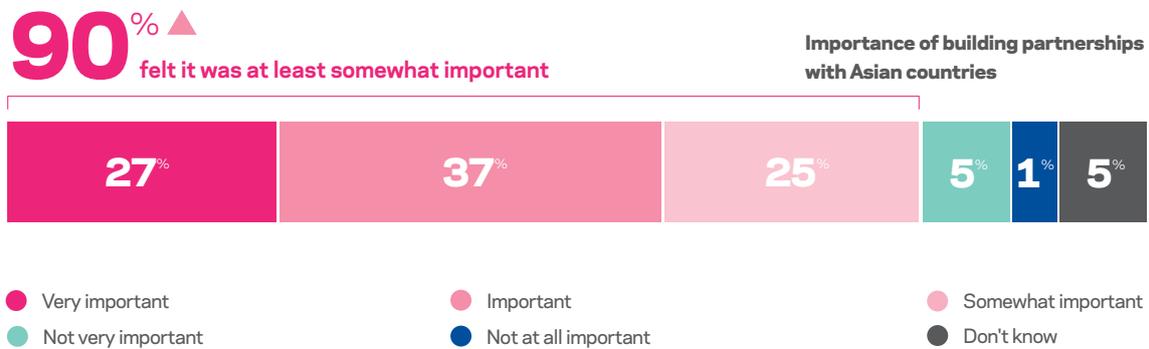
Nine out of ten (90 percent) New Zealanders believe that investing energy and resources into building partnerships with Asian countries is at least 'somewhat important' for New Zealand. Sixty-four percent of New Zealanders say it is 'important' or 'very important' to do. Two-thirds of New Zealanders (65 percent) feel that investing energy and resources into building partnerships with countries in Asia is more important in 2022 than it was five years ago (see figure 10). New Zealanders also support a wide range of activities to grow New Zealand's relationships with Asia (see page 55).

"I don't see big initiatives [from the government] to grow our relationship with Asia. Maybe I'm just not so concerned about it right now... or maybe I'm just not aware of what the government is doing..."

40-49 years, Female, Filipino heritage, Auckland

Figure 10

Importance of New Zealand investing energy and resources into building partnerships with Asia



Q53 — Overall, how important is it for New Zealand to invest energy and resources into building partnerships with Asian countries
Base: All New Zealanders (n=2,323)

Q54 — Compared to five years ago, do you believe it is more or less important for New Zealand to invest energy and resources into building partnerships with Asian countries? (n=2,323)

New Zealanders want to build relationships in Asia that advance trade, technological innovation and tourism

New Zealanders were asked which specific country they thought New Zealand should put more effort into developing a stronger relationship with and why (see figure 11). In 2022 the countries selected (in priority order) were Australia, China, the United States, India, Japan, and the United Kingdom. In a shift from the 2021 survey, respondents prioritised strengthening relations with India and Japan over the United Kingdom and Canada.

As in 2021, expanding trade connections was the top priority for New Zealanders across most nations. However, New Zealanders provided a nuanced set of reasons as to why extra effort was needed to develop relationships with particular countries. These included deepening connections with countries of growing global influence (China and India); expanding defence and security connections (Australia and the United States); and taking advantage of opportunities for technology and innovation partnerships (Japan, India and China).

Figure 11

Which countries should New Zealand develop its relationship with?

14%
Australia



Top three reasons why relationships should be developed further.

72%
Similar culture/ aligned values

71%
Trade/ economic opportunities

70%
Important for security/ defence reasons

12%
China



90%
Trade/ economic opportunities

69%
World/ major power

61%
Opportunities for technology/ innovation

8%
USA



84%
Important for security/ defence reasons

78%
Trade/ economic opportunities

74%
World/ major power

6%
India



91%
Trade/ economic opportunities

64%
Opportunities for technology/ innovation

63%
Growing population size/ influence

5%
Japan



85%
Trade/ economic opportunities

82%
Opportunities for technology/ innovation

72%
Tourism

5%
UK



72%
Trade/ economic opportunities

62%
Similar or aligned culture/ values

62%
Historic connections

Source: Q3f – If New Zealand were to put in extra effort to develop its relationship with one country in the world, what country should it be and why?

Base: All New Zealanders (n=2,323)

Japan, Singapore and South Korea are key defence and security partners for New Zealand in Asia

We asked New Zealanders which countries in Asia they consider to be important defence and security partners. Japan (52 percent), Singapore (39 percent) and South Korea (34 percent) were rated as important defence and security partners for New Zealand to work with. These ratings are largely unchanged from the 2021 survey.

Fewer New Zealanders considered China to be an important security and defence partner in 2022 than in 2021. In 2022, 26 percent of New Zealanders viewed China as an important defence and security partner, down five percentage points from 2021. We also find that three-quarters of New Zealanders (74 percent) are of the view that undertaking joint defence exercises with Asian partners is at least 'somewhat important', up from 57 percent in 2021 (see figure 20 on page 55).

" If I was defence minister I'd be trying to hook up training exercises with as many [Asian nations] as I could, and develop a relationship in that regard."

40-49 years, Male, NZ European, Wellington

Figure 12

Important security partners in Asia



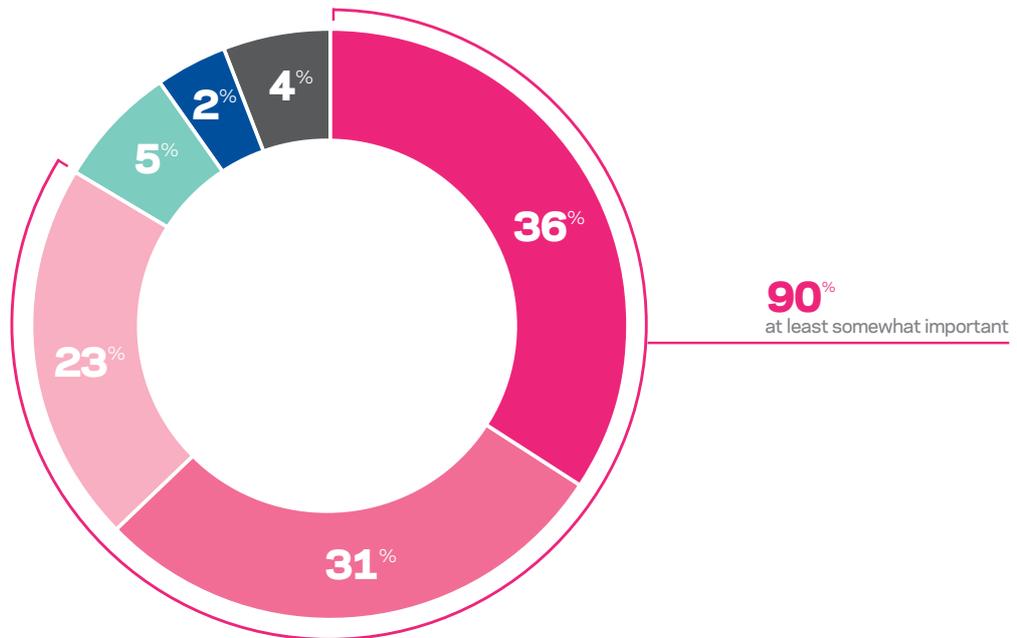
Source: Q43 — In terms of New Zealand's defence and security, which Asian countries are New Zealand's most important partners to work with?
Base: All New Zealanders (n=2,323)

Having a modern defence force able to operate effectively internationally is considered important for New Zealand

In 2022, we asked New Zealanders how important it is for New Zealand to have a modern defence force capable and ready to operate internationally (see figure 13). Most New Zealanders (90 percent) agreed that it was at least 'somewhat important' for New Zealand to have a modern defence force capable of operating internationally. Over two thirds of New Zealanders (67 percent) felt it was 'important' or 'very important' for New Zealand to have a modern and internationally capable military.

Figure 13

Importance of having a modern defence force able to operate effectively internationally



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

Q56 — In the next five years, how important is it for New Zealand to have a modern defence force ready and able to operate effectively internationally?

Base: All New Zealanders (n=2,323)

New Zealand's diplomatic priorities in the coming year

We asked New Zealanders what they thought New Zealand's diplomatic priorities should be for the coming 12 months, in terms of engagement with other countries, regions and institutions.

Forty-five percent of respondents said they support New Zealand engaging in multilateral institutions, including the United Nations (see figure 14). Close to a third of respondents (31 percent) considered that co-operation with Pacific Island nations should be a priority in the coming year. Twenty-seven percent of respondents said co-operation with countries in Asia is a priority, three percentage

points ahead of those who said co-operation with 'Western' countries (24 percent) is a priority. One in ten New Zealanders (11 percent) were unsure about what New Zealand's diplomatic priorities should be in the year ahead.

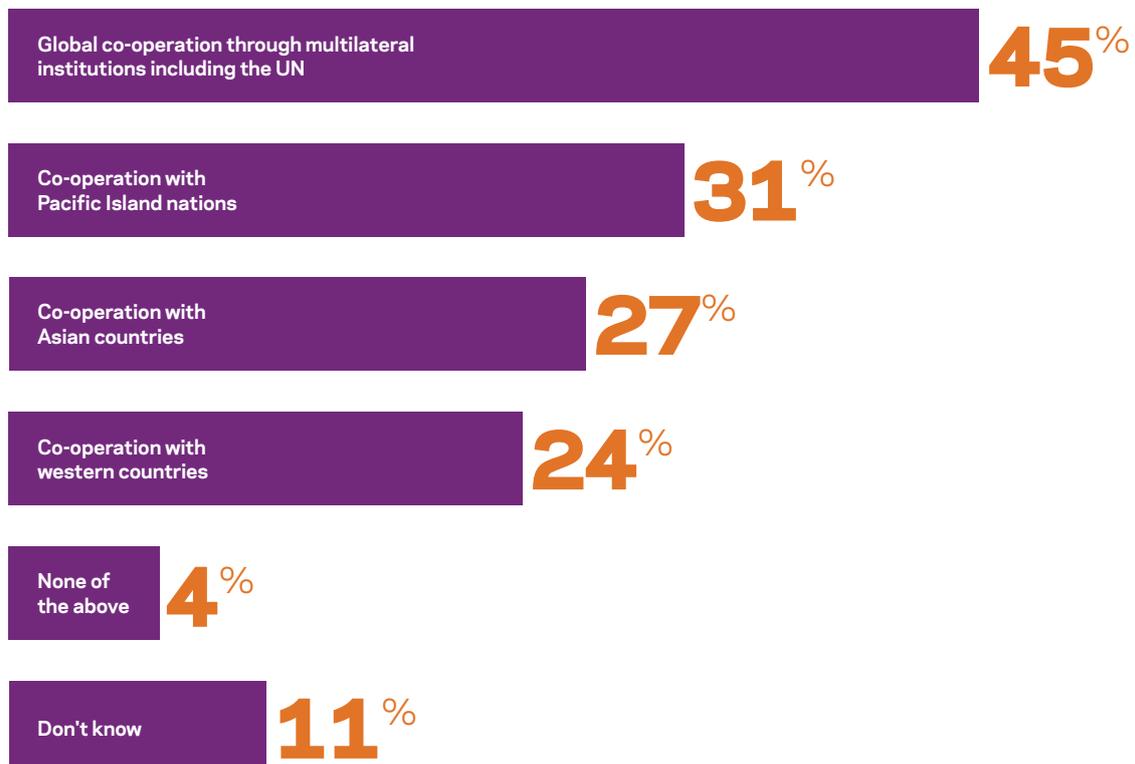
"I was quite intrigued when the foreign minister of India came to New Zealand quite recently... I think there might be some talks between India and New Zealand... maybe on direct flights and some trading deals."

18-29 years, Male, Indian heritage, Otago

Figure 14

Views on diplomatic priorities for New Zealand in the coming twelve months

Percentage who felt the following diplomatic activities were important



Asia at home



2



“The common theme is that cultures can connect quite well over food. So if there’s some sort of way where Asian food could be put on a pedestal and done authentically, I think that’s when you’d start to see New Zealanders become a lot more open to engaging in Asian culture and engaging in the way of life of Asian people.”

WHAT DO NEW ZEALANDERS KNOW ABOUT ASIA?

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



Key findings



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

**New Zealanders'
knowledge levels are
higher for North Asia
than for Southeast Asia
and South Asia.**

**The majority of
New Zealanders feel
some day-to-day
connection with Asia.**

“China” and “food” are the words New Zealanders most closely associate with Asia

We asked New Zealanders to tell us the first word they thought of when they heard or saw the word ‘Asia’ (see figure 15). For the fourth year running, the most common response (28 percent) was ‘China’. Other commonly mentioned words include ‘food’ (8 percent), references to people and population, and other countries in Asia like India and Japan.

“I really believe food is the thing that connects everything. When I came to Auckland almost 13 years ago, there was hardly any restaurants and now when you walk around, you can see a real variety of good food. So, through their cuisines, it’s a good introduction to Asian countries.”

40-49 years, Male, Indian heritage, Auckland

Figure 15

What words do New Zealanders
associate with Asia?

CHINA
FOOD
CROWDED
LARGE
ASIA
TRADE
INDIAN
JAPAN
CULTURE

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

Base: All New Zealanders
(n=2,323)

CONTINENT
PEOPLE
TRAVEL
THAILAND
EAST ASIA
DIVERSITY CHEAP GOODS
INDUSTRY MANUFACTURING
TROPICAL WARM HOT
IMPORTANT NEIGHBOURS
GOOD TOURISM TECHNOLOGY

How New Zealanders rate their knowledge of Asia

Half of those surveyed (50 percent) felt that they know a 'fair amount' or 'a lot' about Asia (see figure 16) – a result largely unchanged since 2019. Knowledge levels of Asia have, however, improved over the past decade. In 2013 only one-third (33 percent) of New Zealanders considered themselves knowledgeable about Asia.

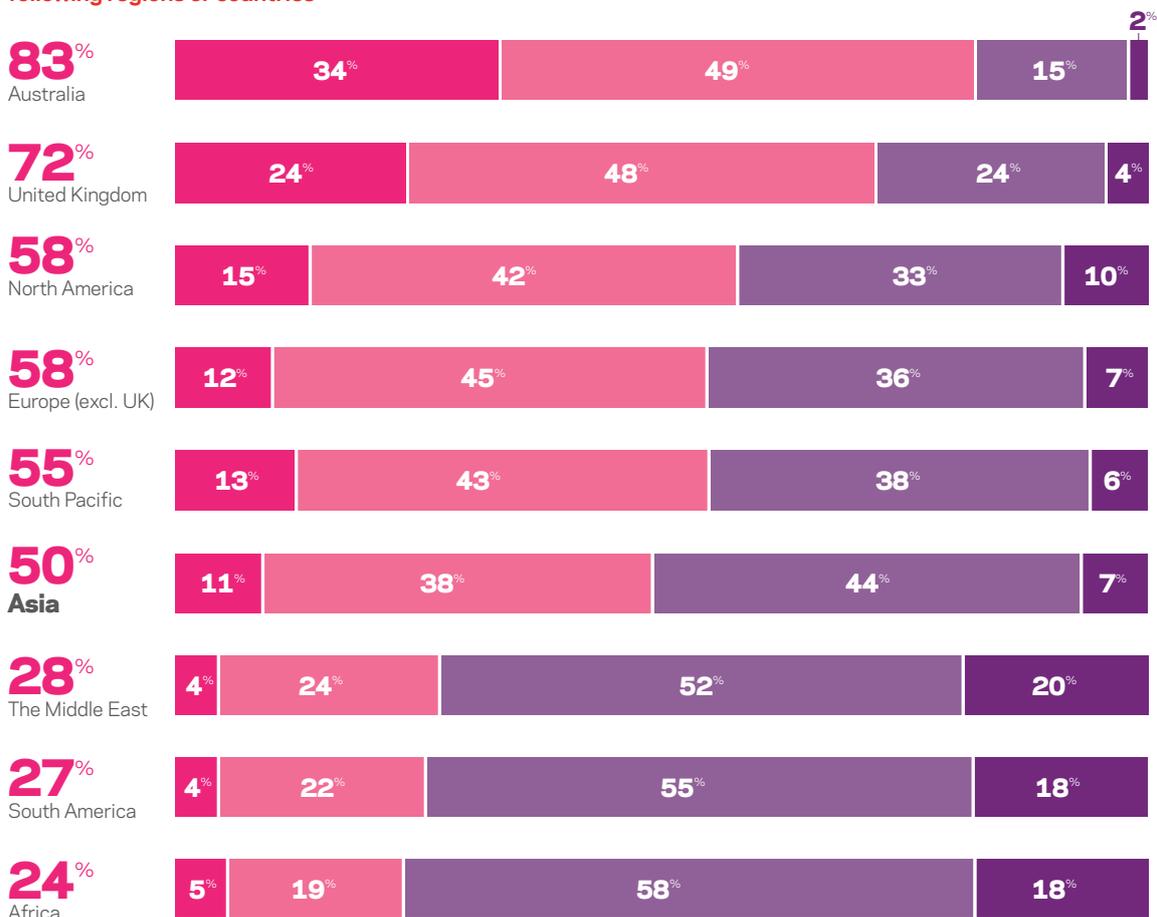
New Zealanders' self-assessed knowledge of Asia (50 percent) is slightly behind their knowledge of the South Pacific (55 percent), and Europe (at 58 percent, up three percentage points from 2021), up from 55 percent in 2021.

New Zealanders aged between 25-39 are more likely to say they know 'a lot' about Asia (17 percent) compared to New Zealanders over the age of 60 (7 percent). As in 2021, New Zealanders in the Auckland region have higher than average self-assessed knowledge of Asia (62 percent). Respondents from Gisborne/Hawke's Bay (34 percent) and Southland (30 percent) have lower self-assessed knowledge of Asia.

Figure 16

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

Percentage of people who know at least 'a fair amount' about the following regions or countries



- A lot
- A fair amount
- A little
- Almost nothing

Source: Q1b — How much do you feel you know about the following regions?

Base: All New Zealanders excluding those who were unsure

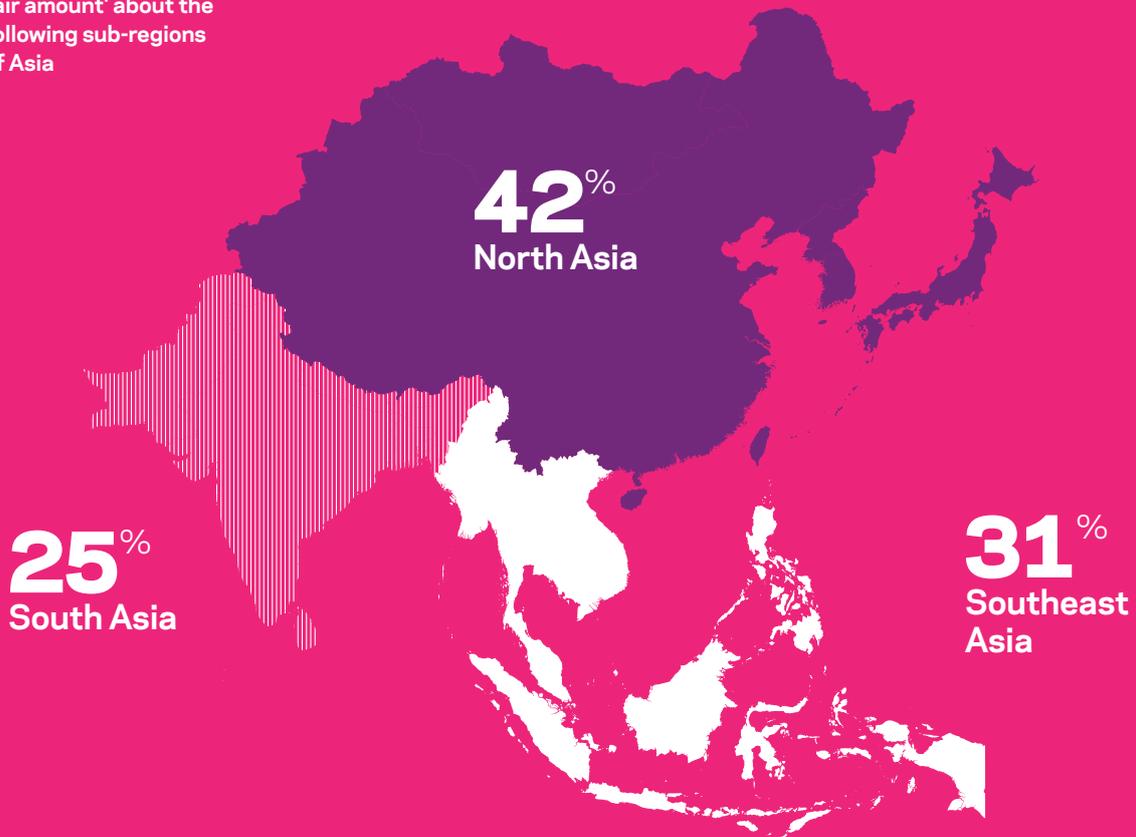
New Zealanders know the most about North Asia

We asked New Zealanders about their knowledge of Asia's sub-regions (see figure 17). Forty-two percent said they know a 'fair amount' or 'a lot' about North Asia (see figure 17), a slight decrease from 2021 (44 percent in 2021). Thirty-one percent of New Zealanders said they know at least a fair amount about Southeast Asia, down slightly from 2021 (33 percent in 2021). A quarter of New Zealanders (25 percent) said they know at least a fair amount about South Asia, a finding unchanged from 2021 and 2020.

Figure 17

How much do New Zealanders know about Asia's sub-regions?

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



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

Base: All New Zealanders excluding those who were unsure

Day-to-day connections with Asia

We asked New Zealanders how connected they felt in their day-to-day lives with Asian cultures, places or people over the past five years on a scale of one to ten (see figure 18). This question was first introduced into the survey in 2020.

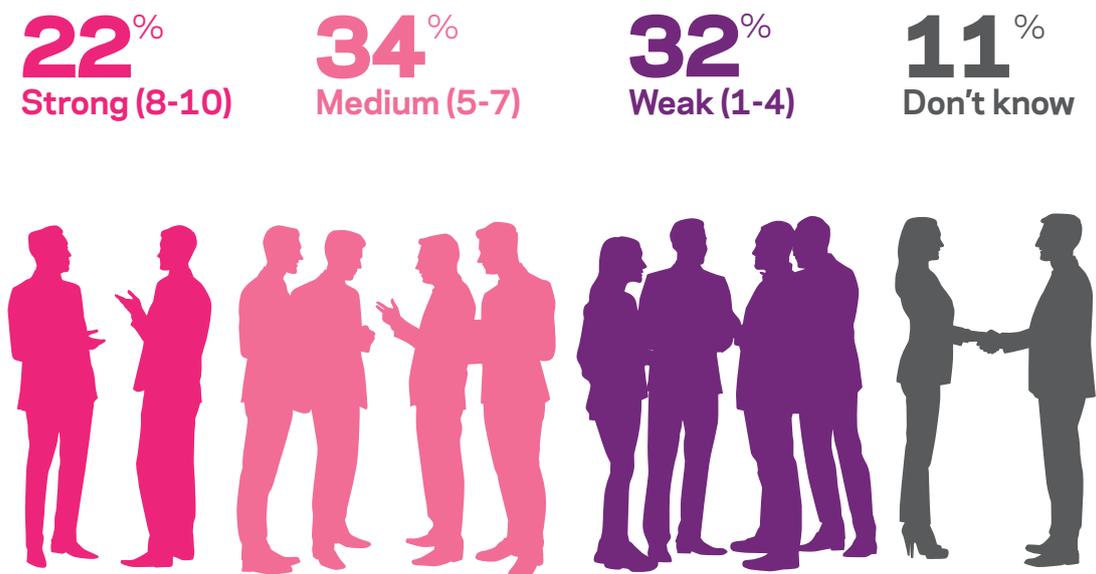
The majority of New Zealanders felt connected to Asia, including one fifth of New Zealanders (22 percent) who felt a 'strong' connection with Asia. These findings are in line with the 2021 survey, but lower than results from the 2020 survey prior to the covid-19 pandemic.

New Zealanders in the Auckland region feel the strongest connection with Asia (32 percent have a 'strong' connection). Residents in Gisborne/Hawke's Bay (10 percent) and Southland (12 percent) were less likely to say they felt a strong day-to-day connection with Asia.

Our research shows a relationship between daily connections with Asian cultures, places or peoples and perceived knowledge and importance of Asia. New Zealanders who feel more connected with Asian cultures are more likely on average to feel Asia is important to New Zealand's future, and they are also more likely to self-assess their knowledge of Asia to be higher.

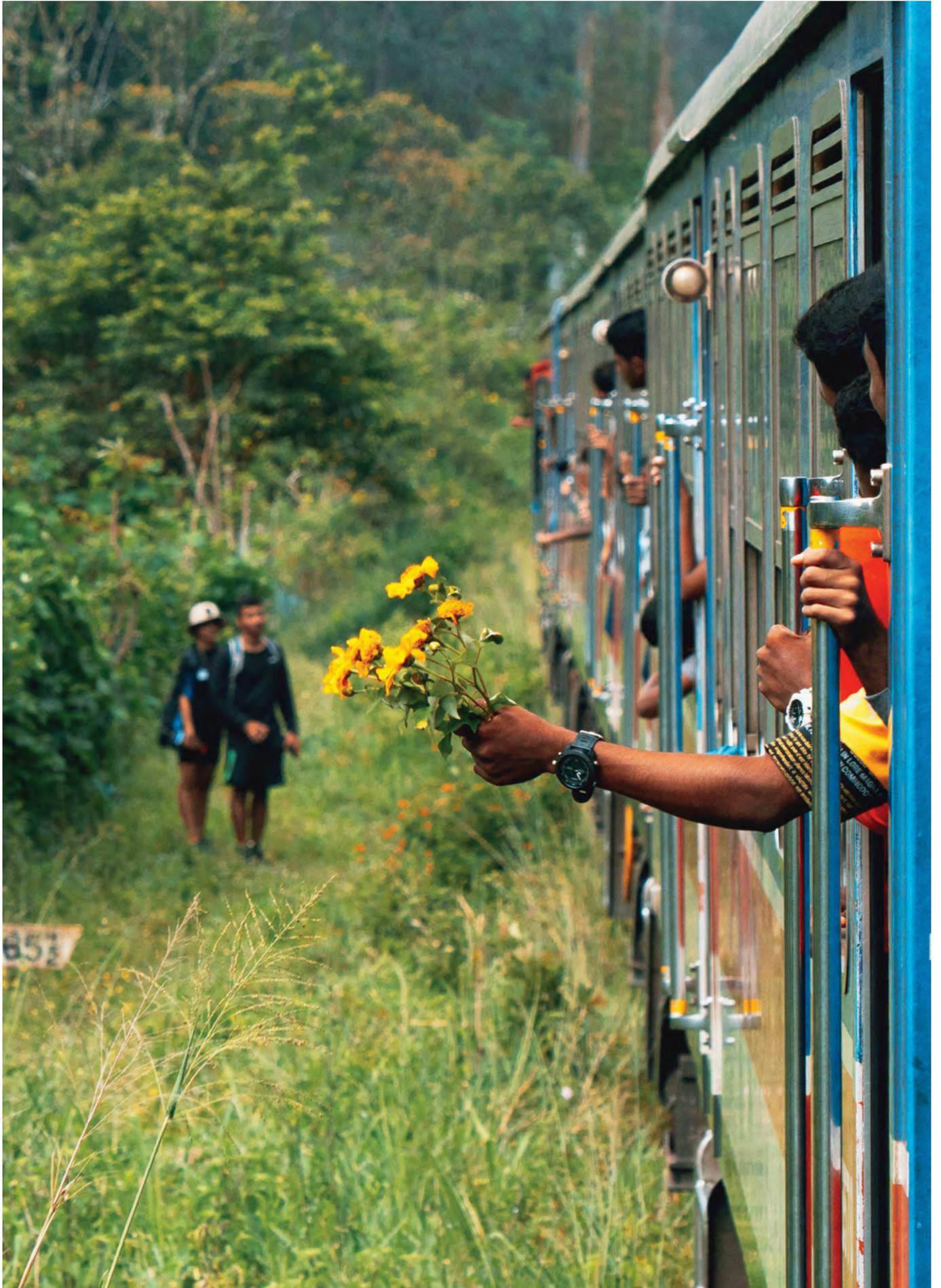
Figure 18

New Zealanders' strength of connection to Asia over the last five years



Source: Q31 — Looking back over the past five years, how connected have you felt, in your daily life with Asian

cultures, places or people who identify as Asian?
Base: All New Zealanders (n=2,323)



“When I think of our relationship with Asian countries, it’s more out of necessity, because we rely on them so much for trade and export and even tourism. The way they see New Zealand really matters, so they keep coming and supporting us because we’re so small and far away. And obviously, we need our economy strong, which is hard to do with a population of 5 million.”

HOW DO WE THINK ASIA WILL IMPACT NEW ZEALAND IN THE FUTURE?

This section examines the future impacts that New Zealanders think Asia will have on New Zealand in the coming years.



Key findings



New Zealanders are positive about the potential economic, technological, and social impacts of Asia on New Zealand in the coming years.

New Zealanders have concerns around Asia's potential future environmental impact, and also worry about the possible negative impacts that Asia's political and security dynamics could have on New Zealand.

New Zealanders are positive about Asia's potential economic, social, and cultural impact on New Zealand in the coming years

We asked New Zealanders for their views on a range of issues where Asia may impact New Zealand over the next 10-to-20 years.

Tourism and technology flows from Asia to New Zealand

New Zealanders are positive about the potential future benefits of tourism flows from Asia to New Zealand (see figure 19 on page 52), a consistent year-on-year finding in our survey.

Seventy-nine percent of New Zealanders feel that direct tourism linkages from Asia to New Zealand will be beneficial in the coming decade, up slightly from 2021.

New Zealanders are also enthusiastic about the future impact of technology and innovation from Asia to New Zealand. Seventy-eight percent of New Zealanders believe developments in technology and innovation originating in Asia will have a positive impact in the future.

Cultural flows and immigration

The majority of New Zealanders (52 percent) hold a favourable view on the future impact of Asian cultures and traditions on New Zealand.

Fifty-six percent of New Zealanders feel that immigration from Asia will have a positive impact on New Zealand in the coming years, a significant increase from 2021 (48 percent). Sentiment regarding immigration from Asia to New Zealand has warmed substantially over the past years. In 2017 only 40 percent of respondents felt positive about the potential impacts of immigration. In 2022, far fewer New Zealanders (17 percent) had a negative view on the impact of immigration from Asia to New Zealand than in 2017 (31 percent).

Economic growth and direct investment from Asia to New Zealand

In terms of economics and investment in New Zealand from Asia, New Zealanders are generally positive. Two-thirds of New Zealanders (67 percent) are of the view that economic growth across Asia's diverse economies will have a positive impact on New Zealand in the next 10-to-20 years. A similar number of New Zealanders (64 percent) are positive towards investment in New Zealand originating in Asia, while a smaller number of New Zealanders (13 percent) held a negative view compared to 2021 (16 percent).

Environmental issues and Asia's political and security context are areas of concern for the future

As in 2021, environmental issues in Asia are an area of concern for New Zealanders. Thirty-four percent of New Zealanders believe environmental issues in Asia will negatively impact New Zealand over the coming decades, however negative sentiment has eased from 2021 (when 39 percent felt negative).

New Zealanders continue to have a mixed outlook on the potential impact on New Zealand of political and security issues in Asia in the years ahead. Thirty-nine percent feel positive about how political and security dynamics in Asia may impact New Zealand, while 27 percent feel negative. These findings are broadly in line with our 2021 and 2020 survey findings.

“I think all countries are becoming more technologically advanced. I recently came back from India. Three or four years ago, I would have to search for shops that accept mobile payments. Now, just a few months back when I went to India, before I asked them, they immediately asked me if I could do phone payment over cash. This was not just the big stores either.”

18-29 years, Male, Indian heritage, Otago

Figure 19

What positive impacts will Asia have on New Zealand over the next 10 - 20 years?



● Positive impact
● Negative impact

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

Base: All New Zealanders (n=2,323)

HOW DO WE CONTINUE TO BUILD CONNECTIONS WITH ASIA?

This section examines what New Zealanders feel is important to build connections with Asia, as well as the linguistic, cultural, and social skills New Zealanders think they need to thrive in and with Asia.



Key findings



New Zealanders are supportive of a range of avenues and activities for growing and deepening New Zealand's relationship with Asia.

Asia-related skills and capabilities are seen as important for New Zealand's future workforce.

Ensuring New Zealand's education system teaches students about Asia and offers Asian languages is seen as important.

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

New Zealanders support a range of approaches and activities for growing engagement with Asia

We asked New Zealanders how important certain activities were for growing New Zealand's relationships with Asia (see figure 20). In 2022, New Zealanders rated a range of activities as important, including business and trade initiatives, dialogue between political leaders, and New Zealand having a long-term plan and vision for enhancing New Zealand's relationships across Asia.

New Zealanders' perceptions of the importance of many activities has increased from 2021 - in some cases significantly. Between 2021 and 2022 we saw a nineteen-percentage point jump in the perceived importance of New Zealand conducting defence exercises with Asian partners.

Ninety-three percent of New Zealanders consider business and trade at least somewhat important for developing New Zealand's relationships with Asia.

A similar number of New Zealanders (91 percent) feel that regular dialogue between political leaders and officials is at least somewhat important for growing Asia relations.

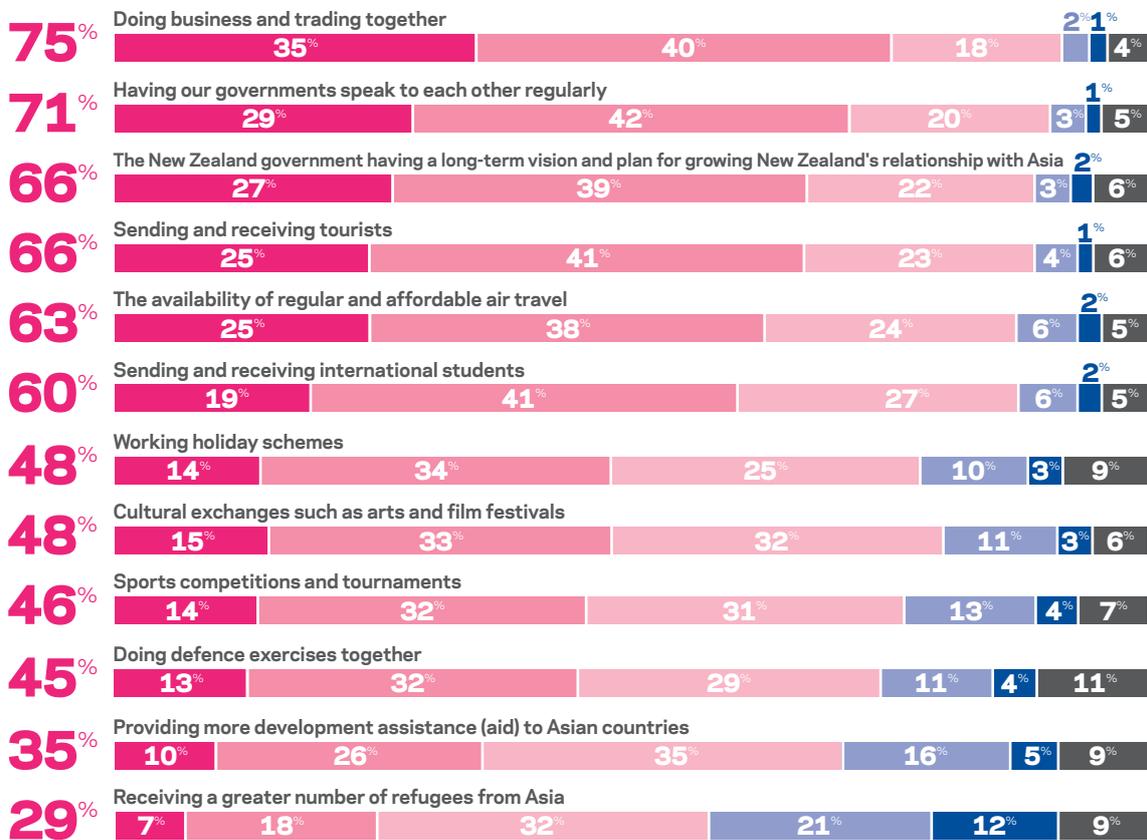
In 2022, we asked New Zealanders about the importance of the New Zealand government having a long-term vision and plan for growing New Zealand's relationship with Asia. Eighty-eight percent of New Zealanders felt that a long-vision and plan was at least somewhat important for building New Zealand's relationships across Asia, with 66 percent of the view this was 'important' or 'very important'.

As in 2021, New Zealanders are comparatively less certain of the importance of activities such as providing additional development assistance or receiving a greater number of refugees from Asia.

Figure 20

Ways to grow relationship with Asia

Percentage of people who felt an activity was important



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

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

Base: All New Zealanders (n=2,323)

Understanding Asia is important for New Zealand's future workforce

As in previous surveys, in 2022 we asked New Zealanders about the importance of equipping New Zealand's future workforce with Asia-related skills and capabilities (see figure 21). As in 2021, confidence in engaging with people from Asian cultures and understanding cultural norms and etiquette are rated as the two top Asia-related capabilities required for New Zealand's future workforce.

In 2022, more New Zealanders (36 percent) felt that an understanding of religious practice in Asia would be important or very important for New Zealand's future workforce – a five percentage point increase from 2021 (31 percent).

New Zealanders with a university degree are more likely to view Asian cultural competency as important for New Zealand's future workforce compared to those with other qualifications.

“Traditionally, Kiwis' view of relationships are more transactional, compared to some Asian cultures where if you want to do business, the first thing you would do is actually build relationships and trust and respect. So that's kind of the different perspectives.”

40-49 years, Female, Taiwanese heritage, Auckland

Figure 21

How important is Asian cultural competency of our future workforce



- Very important
- Important
- Somewhat important
- Not very important
- Not at all important

Source: Q13 — How important are the following Asia-related skills for our future workforce and the career paths of New Zealanders?

Base: All New Zealanders (n=2,323)

Teaching students about Asia and offering Asian language courses are important for New Zealand's education system

In 2022, we asked New Zealanders about the importance of New Zealand's schools and universities teaching students about Asia and offering Asian languages as a course of study (see figure 22). Four out of five New Zealanders (79 percent) say that both teaching students about Asia and offering Asian language courses are at least somewhat important for New Zealand's education system. New Zealanders under the age of 30 are more likely to view Asia-related teaching as 'very important' or 'important' compared to New Zealanders over the age of 30.

"I did work with clients in Vietnam almost 10 years ago, and the biggest barrier back then was language. We struggled to get the right people to understand the language. We still don't really have those abilities or skills in New Zealand. That's really what's stopping us going into trade in those countries."

40-49 years, Male, Indian heritage, Auckland

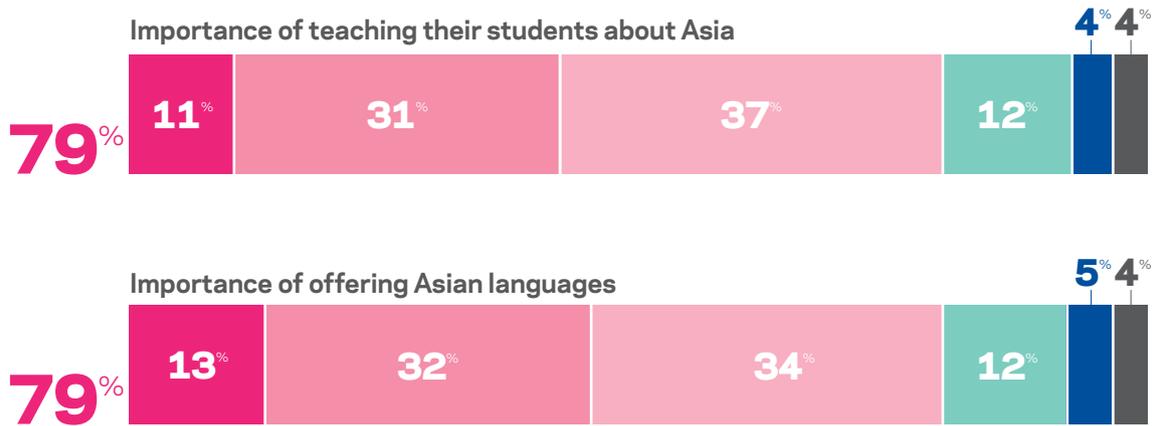
"I remember when I worked as a secondary teacher, that I asked that very question. I said, what about, you know, what about Asia? What about Africa? What about all these other countries and all these other places of interest? Historically, there wasn't really much about Asia, it was the smallest sort of touch if anything that we ever covered. I don't know why, to be honest, and I don't think it's changed as much either."

50-59 years, Male, Pākehā/NZ European heritage, Bay of Plenty

Figure 22

How important is it for New Zealand's education system to teach about Asia?

Percentage who felt it was at least 'somewhat important'



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

Source: Q59 — Overall, how important is it that New Zealand schools and universities do the following?

Base: All New Zealanders (n=2,323)

Food, travel, and commerce are New Zealanders' top Asia interests

We asked New Zealanders about their day-to-day interest in Asia. As in 2021 and 2020, food remains the top Asia-related interest for New Zealanders, with 87 percent reporting they are interested in Asian cuisines.

In 2022, New Zealanders are more interested in travelling to Asia than in 2021. Seventy-eight percent of New Zealanders are at least somewhat interested in Asia travel, up from 72 percent in 2021 and reflecting the shift towards open borders following the covid-19 pandemic. Seventy percent of New Zealanders are interested in business

and trade with Asia, up six percentage points from 2021.

Fifty-nine percent of New Zealanders are at least 'somewhat interested' in music, art and literature from Asia while 52 percent are interested in television, movies and games originating from Asia. Younger New Zealanders are more likely to be interested in music, art and literature from Asia (71 percent are at least 'somewhat interested') and television, movies and games from Asia (70 percent are at least 'somewhat interested').

Figure 23

What Asia related interests do New Zealanders have?



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

This section looks at the media sources and headlines shaping New Zealanders' perceptions and knowledge of Asia. It also examines how consumption of entertainment and cultural content from Asia is connecting New Zealanders to the region.



Key findings



More New Zealanders recall having consumed Asia-related news coverage in 2022 than in 2021 or 2020.

New Zealanders have mixed views on whether there is enough coverage of Asia in the New Zealand media.

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

Respondents say that Japan, Singapore, South Korea, China and India require greater coverage in New Zealand media.

Around one third of New Zealanders watch, play or listen to Asia-related entertainment each month.

More Asia-related news was consumed in 2022, although coverage is considered less balanced than in 2021

In 2022, 45 percent of New Zealanders recalled having seen, read or heard Asia-related news and media over the three months prior to the survey, up from 39 percent in the 2021 survey (see figure 24).

Forty-six percent of New Zealanders feel that coverage of Asia-related events in New Zealand media is balanced and fair, down from 50 percent in 2021. Twenty-two percent of New Zealanders are of the view that coverage of Asia in the media can be too negative at times. Fourteen percent of New Zealanders were of the view that New Zealand media are too positive about Asia, an increase of seven percentage points from 2021.

Close to a third of New Zealanders feel Asia receives too little coverage in New Zealand media

In 2022, thirty percent of New Zealanders feel that Asia receives too little coverage in New Zealand media, down from 37 percent in 2021. Forty-six percent of New Zealanders feel Asia receives about the right amount of media coverage, on par with the 2021 survey (47 percent).

Figure 24

What information about Asia are New Zealanders receiving?

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

Source: Q26a
Base: All New Zealanders 2022 (n=2,323).

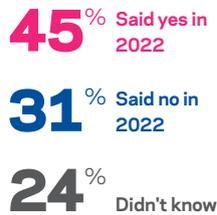


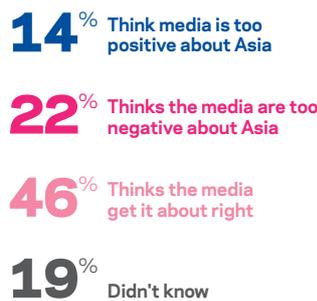
Figure 25

Asia coverage in New Zealand media and media sentiment

Coverage of Asia in NZ media



Sentiment of Asian coverage in NZ media



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

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

Japan, Singapore, South Korea, China and India top the list of Asian countries New Zealanders would like to see more coverage of in the media

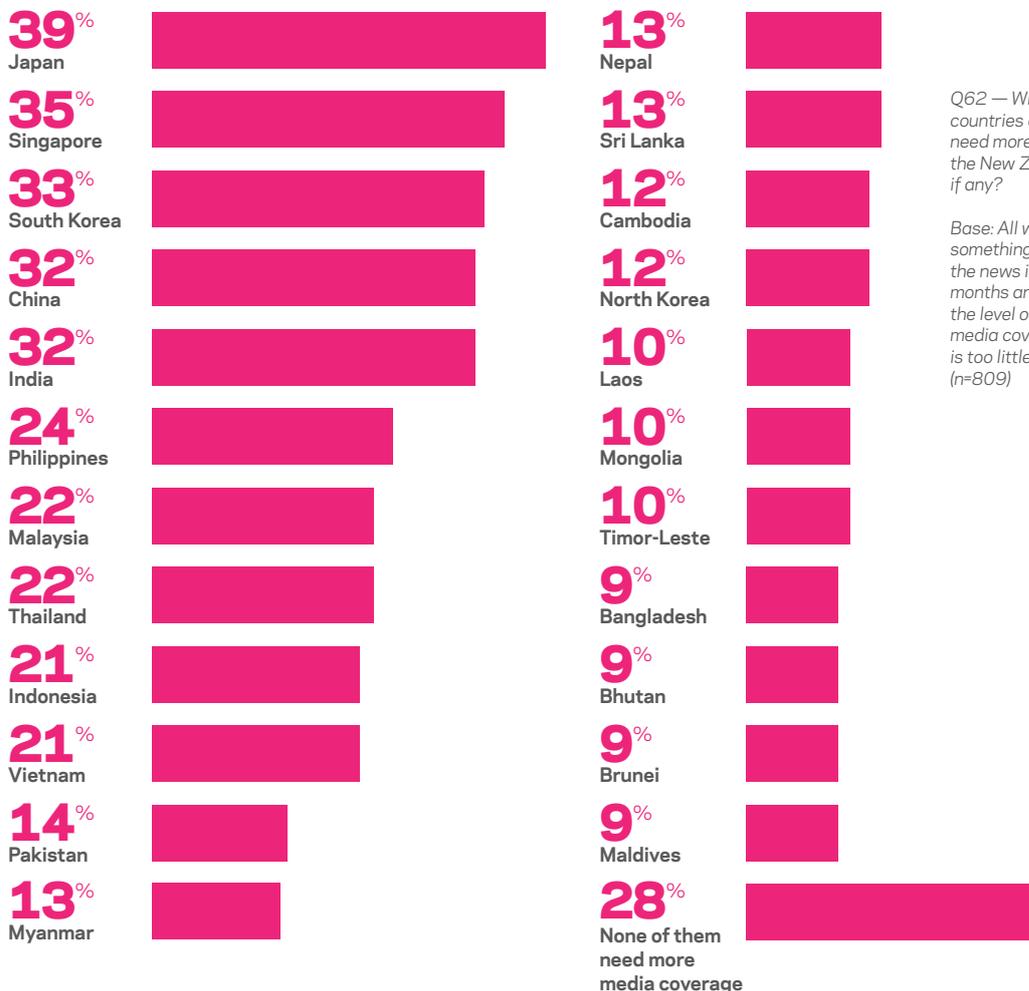
In 2022, we asked respondents who felt that the level of New Zealand media coverage of Asia was 'too little' or 'about right' which countries in Asia they viewed as needing greater media coverage and attention (see figure 26). In response, the top five countries New Zealanders thought were deserving of more coverage were: Japan (39 percent), Singapore (35 percent), South Korea (33 percent), China (32 percent), and India (32 percent).

“In the news, they usually like to show the worst stories. But that doesn't really have any impact on how I see the different Asian countries. And I don't feel any less like I want to go to travel around Asia.”

30-39 years, Female, Pasifika, Auckland

Figure 26

Which countries in Asia need more coverage in the New Zealand media?



Q62 — Which Asian countries do you think need more coverage in the New Zealand media, if any?

Base: All who have seen something about Asia in the news in the last three months and believe that the level of New Zealand media coverage of Asia is too little or about right (n=809)

New Zealanders are consuming Asia-related entertainment* with greater frequency

The number of New Zealanders watching, playing, or listening to Asia-related entertainment annually has remained unchanged between 2021 and 2022 at 65 percent. There has, however, been an increase in the frequency of consumption. In 2022, 26 percent of New Zealanders consumed Asia-related entertainment 'at least once every three weeks,' up from 24 percent in 2021 and 19 percent in 2020.

New Zealanders under the age of 30 are consuming Asia-related entertainment with greater frequency than those over the age of 30. Forty-five percent of under-30s are consuming Asia-related entertainment at least once every three weeks, compared to 19 percent of those aged 30 and above.

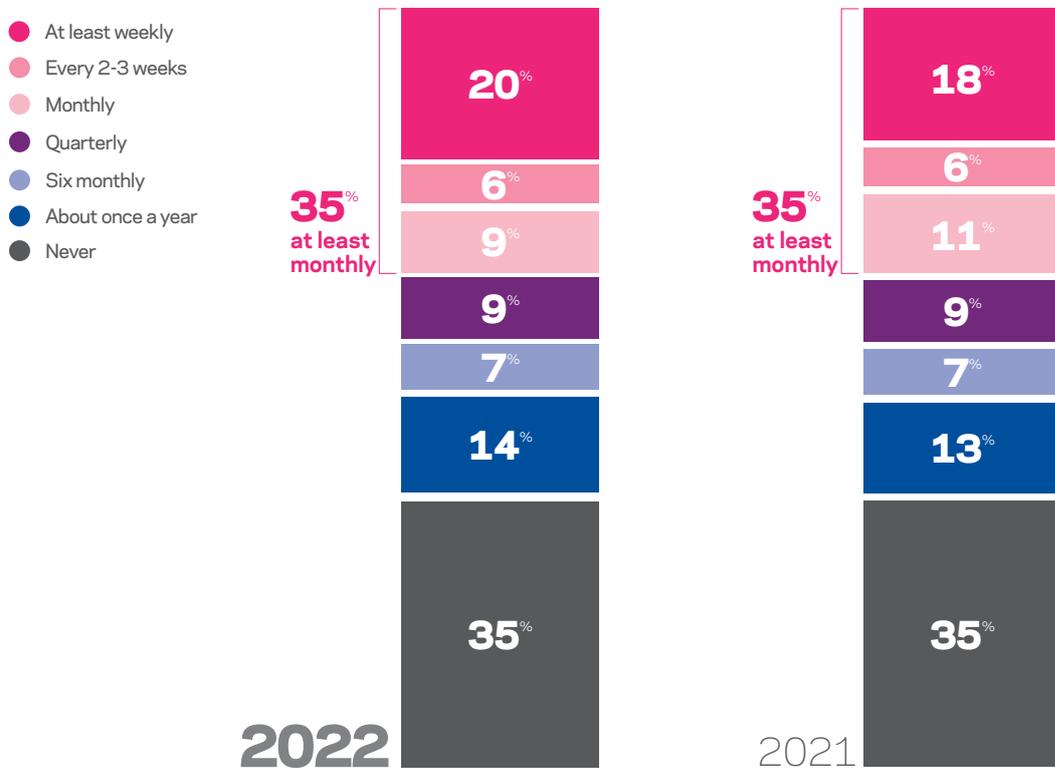
"I've noticed the influence that Japan, China and the Asian way of living has influenced Western society, through anime and through pop culture. It's through Pokémon, Dragonball Z, that all belongs to Asian society, and even comics, manga. So, it's influenced younger generations, I would say, more than it has me."

18-29 years, Male, Māori, Auckland

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

Figure 27

Frequency of consuming Asia-related entertainment.



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

Base: All New Zealanders 2022 (n=323) 2021 (n=2,334)

New Zealanders watched, played, and listened to a range of Asia- related entertainment in 2022

We asked New Zealanders who consume Asia-related entertainment regularly (at least monthly) what kinds of television, movies, music, or gaming content they have consumed recently. New Zealanders recalled watching or listening to Asia-related movies (17 percent), television (16 percent) and music (six percent).

“Korea has been making movies before I guess they got popular on Netflix and they’re usually action-y crime type films that either got well-known in their own right or have been copied by Western producers.”

40-49 years, Male, NZ European, Canterbury

“Seeing Asian entertainment becoming mainstream normalises it. It loses a bit of that mystique or unknown and becomes a bit more commonplace. We get the hype, we get all the trends. It’s that awareness, but with awareness sometimes it can get to oversaturation. Like *Parasite*, or *Squid Game* — they almost become these cultural phenomena. It feels like you see it everywhere. It’s all over social media. It has these real high peaks and troughs of interest.”

18-29 years, Male, Pākehā/NZ European, Auckland

“Asia masters ‘hype’. [Asian countries] seem to be able to create trends quite commonly. You look at Pokémon Go, you look at TikTok, look at Squid Game and BTS... [they] spread like wildfire.”

18-29 years, Male, Māori/NZ European heritage, Wellington



“I went to Japan for six months for a Uni exchange just before covid-19, and it was just a really crazy, intense experience. Being able to live there is different from being a traveller. Living there you’re able to see quite a different perspective. I’m definitely interested in traveling to other places now that I’ve been able to be exposed to that culture.”

BACKGROUND, METHODOLOGY AND SAMPLE PROFILES

This section explains the background context of the survey, and the methodology and sample used for the survey research.



About the annual Perceptions of Asia and Asian Peoples Survey

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

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

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

- The perceived importance of Asia over time
- Views about the benefits to New Zealand of a relationship with Asia
- Perceptions of Asian peoples and cultures
- Perceived knowledge of Asia
- Perceptions of regional security dynamics
- Perceptions of New Zealand foreign policy priorities
- Media perceptions and consumption
- Perceived involvement with Asian people and cultures
- Asia-related interests, including travel and attending relevant events
- Specific events of note in the region

Where possible, we have endeavoured to keep a core set of questions largely unchanged year-on-year, to allow for a full range of comparisons between years to be made. Results are rounded to the nearest one percent, meaning some totals (in each of the graphs) are just above or just below 100 percent.

Quantitative methodology

A nationally representative sample of 2,323 respondents aged 15 years and over completed the survey between 4 - 30 November 2022. A survey of 2,323 people has a maximum margin of error of +/- 2.0 percentage points at the 95 percent confidence level.

Data collection method

As with 2021, respondents completed a 20-minute online self-completion survey. Before 2017, surveys were completed via telephone interviewing. The online survey approach allows for a slightly longer questionnaire and an expansion of the overall sample size. A larger sample enables more detailed demographic analysis, including the identification of patterns by, amongst other variables, age groups, regions and ethnicity.

Sampling and weighting

Respondents were drawn from Kantar New Zealand's online research panels, recruited from both offline and online sources (including through random telephone surveys, social media, advertising and the Fly Buys loyalty programme). The panel meets or exceeds all 28 global best practice standards outlined by ESOMAR for panel development and management.

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

Qualitative methodology

Other notes

- Within the body of this report, subgroups 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 concurrent qualitative research to further explore some of the themes of the research and help bring the numbers to life. The qualitative research was carried out through four focus groups. Details of the qualitative research are outlined below.
- Throughout this report 'New Zealanders' refers to all those aged 15 and above, living in permanent private residences in New Zealand, including those who were born in New Zealand and those who were born elsewhere.
- The 'mini-poll' referenced on page 21 of the report refers to a June 2022 survey commissioned by the Asia New Zealand Foundation and conducted by Kantar Public. The Foundation decided to commission this additional survey due to events in Europe and media coverage of China's role in the Pacific. The June 2022 survey provided updated results to three questions asked in the main 2021 Perceptions of Asia survey, including on threat perceptions. The June 2022 survey was in the field between 13-15 June 2022 and canvassed the views of 1,186 New Zealanders. The mini-poll was representative of New Zealand demographics by age, gender, location, and ethnicity. The margin of error for the June 2022 survey was +/- 2.9 percentage points at a 95% confidence level.

We conducted four sets of two-hour focus groups (between five and seven participants in each) with New Zealanders across the country via Zoom. The group conversations covered a range of topics relating to New Zealand's relationship with Asia, from geopolitics and trade to entertainment and popular culture. The focus groups were conducted using a semi-structured approach, allowing participants to guide the conversations and freely share their thoughts, personal experiences and stories. Quotes from the qualitative participants are included throughout the report to support the quantitative findings.

Our audience aimed to provide a snapshot of the general population, and also included a deliberate sample of New Zealanders of Taiwanese descent. Across all the participants, there were a range of ages, genders, socio-economic backgrounds, and geographic locations, as well as differing knowledge and interest levels of international relations, politics, news and trade. The full sample composition can be found in Appendix B.

Fieldwork took place between 14th - 25th November 2022.

Appendix A: Quantitative survey sample profile

Gender and age

Gender	Unweighted percent (n=2,323)	Weighted percent (n=2,323)
Male	52	49
Female	48	51
Gender diverse	-	-

Age	Unweighted percent (n=2,323)	Weighted percent (n=2,323)
15-17 years	5	5
18-29 years	13	21
30-39 years	22	16
40-49 years	14	16
50-59 years	15	16
60+	31	26

Ethnic identification

	Unweighted percent (n=2,323)	Weighted percent (n=2,323)
New Zealand European / Pākehā	72	72
Māori	14	13
Pacific Peoples	6	6
Asian New Zealander	17	15
- Chinese	6	5
- Indian	6	5
- Other Asian ethnicity	2	2
Other	2	2

Region

	Unweighted percent (n=2,323)	Weighted percent (n=2,323)
Te Tai Tokerau / Northland	4	4
Tāmaki Makaurau / Auckland	28	33
Waikato	8	10
Te Moana-a-Toi / Bay of Plenty	7	7
Tairāwhiti / Gisborne	1	1
Te Matau-a-Māui / Hawke's Bay	3	4
Taranaki	4	2
Manawatū-Whanganui	5	5
Te Whanganui-a-Tara / Wellington	9	11
Te Tai o Aorere / Tasman	1	1
Whakatū / Nelson	2	1
Te Taihū-o-te-waka / Marlborough	1	1
Te Tai Poutini / West Coast	4	2
Waitaha / Canterbury	11	13
Otago / Otagou	5	5
Southland / Murihiku	4	2

Highest education level

	Unweighted percent (n=2,323)	Weighted percent (n=2,323)
Primary/Intermediate school	1	1
Secondary school	26	25
Vocational or trade qualification	26	25
University degree	32	34
Postgraduate degree	13	13
Prefer not to answer	3	3

Appendix B: Qualitative sample composition

Age

18-29 years	12
30-39 years	6
40-49 years	7
50-59 years	2

Gender

Female	15
Male	12

Location

Tāmaki Makaurau / Auckland	13
Te Whanganui-a-Tara / Wellington	3
Waitaha / Canterbury	3
Te Moana-a-Toi / Bay of Plenty	3
Otakou / Otago	2
Manawatu-Whanganui	1
Taranaki	1
Te Tai Poutini / West Coast	1

Area type:

Urban	13
Suburban	10
Rural	4

Ethnicity*:

NZ European / Pākehā	6
New Zealanders of Taiwanese heritage	6
Māori	5
Indian	2
Southeast Asian	4
Pacific Peoples	2
Chinese	1
Other European	1

*Respondents may belong to more than one group, however, have only been counted once here.

“I think one country that New Zealand should definitely do more trade with is Indonesia. That is the new hotspot. It should be New Zealand’s priority...”

ABOUT THE ASIA NEW ZEALAND FOUNDATION TE WHĪTAU TŪHONO

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

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

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

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