



New Zealanders' Perceptions of Asia and Asian Peoples

2018 Annual Survey



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Authors
Asia New Zealand Foundation,
with text and analysis by Colmar Brunton
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Comment from the Executive Director



This year's *Perceptions of Asia* report tells us that connections matter. The data shows those New Zealanders who have a personal connection with Asia – whether gained from personal relationships, language, cultural involvement or travel – are more likely to feel knowledgeable about Asia.

Moreover, from that higher knowledge base, they are more likely to see the positive impacts of New Zealand's relationship with Asia; to consider Asia more important to New Zealand's future; and to invest in the skills needed to make the most of the opportunities available in Asia.

The terror attacks on Christchurch mosques on 15 March 2019 highlighted the importance of building knowledge, understanding and connections between cultures.

Strengthening the connections between New Zealand and Asia has been the work of the Asia New Zealand Foundation for 25 years — but the events of 15 March demonstrate that building cultural understanding is a long game. This work is needed now more than ever.

The research presented in this report was conducted in late 2018, and its findings shed light on where New Zealanders may have gaps in their knowledge and understanding of Asia. But the findings also identify possible ways to bridge those gaps. Some of these pathways to increased understanding also emerged in our recent report on perceptions of Asia in Te Ao Māori.

The Foundation has been tracking New Zealanders' perceptions of Asia since 1997, and Aotearoa's demography has changed profoundly since that first report. Despite that, the latest survey finds more than half of all New Zealand adults have little personal connection to Asian cultures or people of Asian ethnicity.

For those people who invest in building their knowledge, interests like film, music, sport, books, gaming and social media (and yes, food) can play a role in fostering deeper connections and understanding.

The research also shows that young people are playing a role as influencers on older New Zealanders, including their parents.

Perceptions of Asia also confirms that travel is a vital entry point to gaining more knowledge – and is the most significant enabler of Asia knowledge.

Compared to five years ago, survey respondents felt mainstream media's coverage of Asia was more positive. And while traditional and online media were still the most significant sources of Asia-related information for most New Zealanders; for the under-30s, social media and pop culture were the most important.

New Zealanders continue to think most countries are friendly towards New Zealand, with the "friendliest" perceived to be Australia and the United Kingdom. Some countries – China, India and Russia – were perceived to be less friendly than a year earlier. New Zealanders see North Korea, China and the United States as the biggest threats, with a significant increase in the number who named Russia as the biggest threat.

Finally, the survey sheds light on New Zealanders' knowledge of some developments in Asia, and of upcoming events. When we asked about China's Belt and Road Initiative, APEC 2021 and upcoming sporting events in Japan, we saw a solid knowledge base but also plenty of potential for learning more.

The *New Zealanders' Perceptions of Asia and Asian Peoples 2018 Annual Survey* will inform the Foundation's work over the next year. We trust others will find it enlightening for their own mahi.

Simon J Draper

Asia New Zealand Foundation
Te Whītau Tūhono



Our approach



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

This report presents the results of an annual survey of 2000 New Zealanders aged 15 years and over conducted from late October through to early November 2018. The results have been weighted so that they are representative of New Zealanders by 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 our growing ethnic diversity, with an estimated 15 percent of the population identifying as being of Asian ethnicity in 2018, compared with six percent in 2001. This report explores the way New Zealanders' relationship with Asia is evolving.

What is the relationship between knowledge and perceptions of Asia?

The Asia New Zealand Foundation's *Perceptions of Asia* survey has, over the years, identified a clear correlation between knowledge of Asia and perceptions – the more we know about Asia, the more positive we tend to be about Asian countries and the impact of Asia on New Zealand. The results also demonstrate that New Zealanders with greater knowledge of Asia tend to think more needs to be done to prepare New Zealanders to thrive in Asia. This is consistent with the findings in *Thinking Careers? Think Asia*: a short research report carried out in mid-2018 that asked young people about the opportunities available to them in Asia.

For more on the report go to:

www.asianz.org.nz/research/thinking-careers-think-asia/

Changes to the questionnaire

This year's survey includes a series of questions on media coverage and new questions about New Zealanders' knowledge of and attitudes to major upcoming international sporting events in Japan (Rugby World Cup this year, and in 2020 the Olympics and Paralympics) and New Zealand hosting APEC in 2021.

Focus on youth

Throughout this report we highlight the views and experiences of young people (aged 15 to 30), who are an important audience for the Foundation. This demographic is broadly more positive about Asia compared to older New Zealanders, and more connected through social media and travel. Young people rate the importance of Asian language skills, but also recognise the role technology might play in bridging the divide between the English and Asian languages.



Comparison with previous surveys

In this year's report, we have provided some comparisons between 2013, 2017 and 2018 survey results, to show the changing trends in New Zealanders' perceptions of Asia over time. Although the survey methodology has changed - from telephone interviews to online questionnaires - the questions have remained largely unchanged.

Context for the survey

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

- The topic of "Chinese political influence" was frequently discussed in New Zealand and international media.
- Mid-term elections in the United States.
- China International Import Expo in Shanghai.
- Escalating trade tensions between China and the United States.
- Escalating tensions between India and Pakistan.
- The Rohingya refugee crisis in Myanmar and Bangladesh.
- Coverage of Indo-Pacific relationships.
- News about China's Belt and Road Initiative.
- Ongoing news about property prices, the housing crisis and concern about the impact of "foreign buyers" on the market.
- Escalating tensions in North Korea.



How knowledgeable are New Zealanders about Asia?

This section looks at New Zealanders' self-assessed knowledge of different regions around the world, including Asia. It explores changes in Asia-related knowledge over the past five years and identifies groups of people with higher knowledge. It then looks at how this knowledge impacts New Zealanders' perceptions of Asia.

Key findings



Knowledge of Asia is rising, particularly for under 30-year-olds whose self-assessed knowledge of Asia has increased 17 percentage points since 2013. If New Zealanders' self-assessed knowledge of Asia continues to increase at current rates, their knowledge of Asia will be higher than their knowledge of the South Pacific by 2020.

Greater personal connection to Asia or Asian cultures results in significantly higher self-assessed knowledge. Personal connections to Asia are helping to deepen knowledge, particularly for those who speak an Asian language, are involved with Asian cultures or peoples, or who have travelled to Asia.

People who are connected to Asia are more attuned to the positive benefits of fostering New Zealand's relationship with Asian countries. People with higher levels of knowledge about Asia can better express the benefits of New Zealand deepening its connection to Asia and are more open to developing the skills required to take advantage of the opportunities available in Asia.

Almost half of New Zealanders feel they have 'a fair amount' of knowledge about Asia

Almost half (48 percent) of New Zealanders feel they have at least 'a fair amount' of knowledge about Asia. However, as Figure 1 shows, this continues to be lower than self-assessed knowledge of Australia, Europe, North America and the South Pacific. Knowledge of Asia is twice that of the Middle East, South America and Africa.

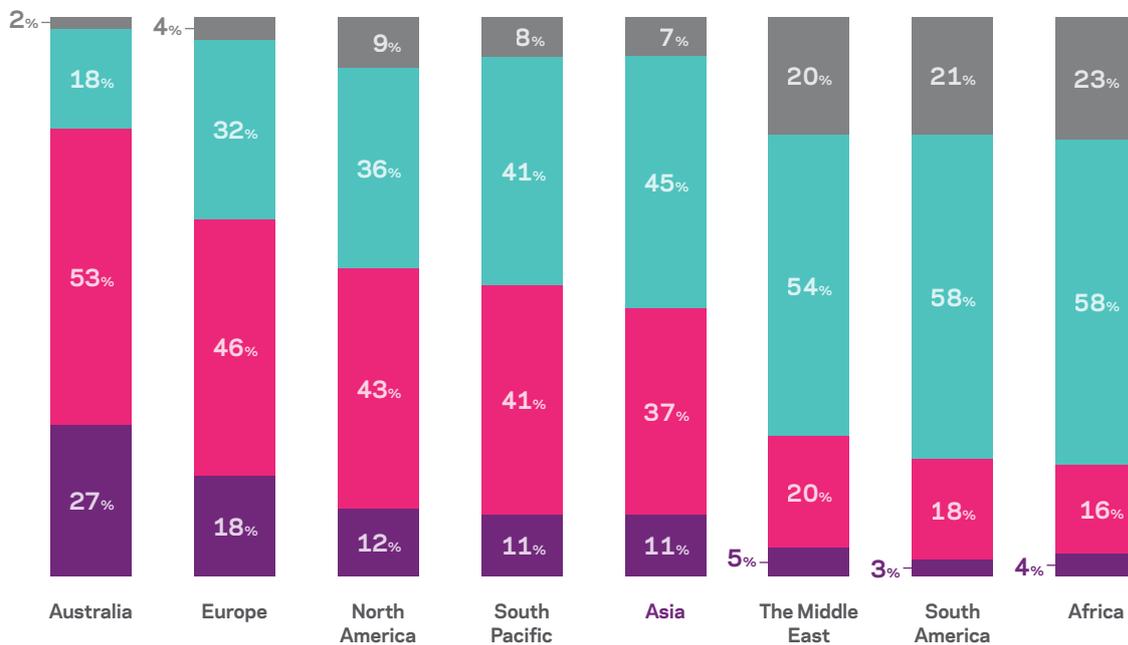
Self-assessed knowledge of Asia is improving

There has been a marked improvement in New Zealanders' self-assessed knowledge of Asia over the past five years (Figure 2). Those who said they knew 'a lot' about Asia has almost doubled, from six percent in 2013 to 11 percent in 2018, with a ten-point rise for those who know 'a fair amount', from 27 percent to 37 percent.

The rise in self-assessed knowledge has been even more marked for under 30-year-olds; up 17 percentage points since 2013. At current growth rates, New Zealanders self-assessed knowledge of Asia could be more than their knowledge of the South Pacific by 2020.

Figure 1

How much do New Zealanders feel they know about these parts of the world?



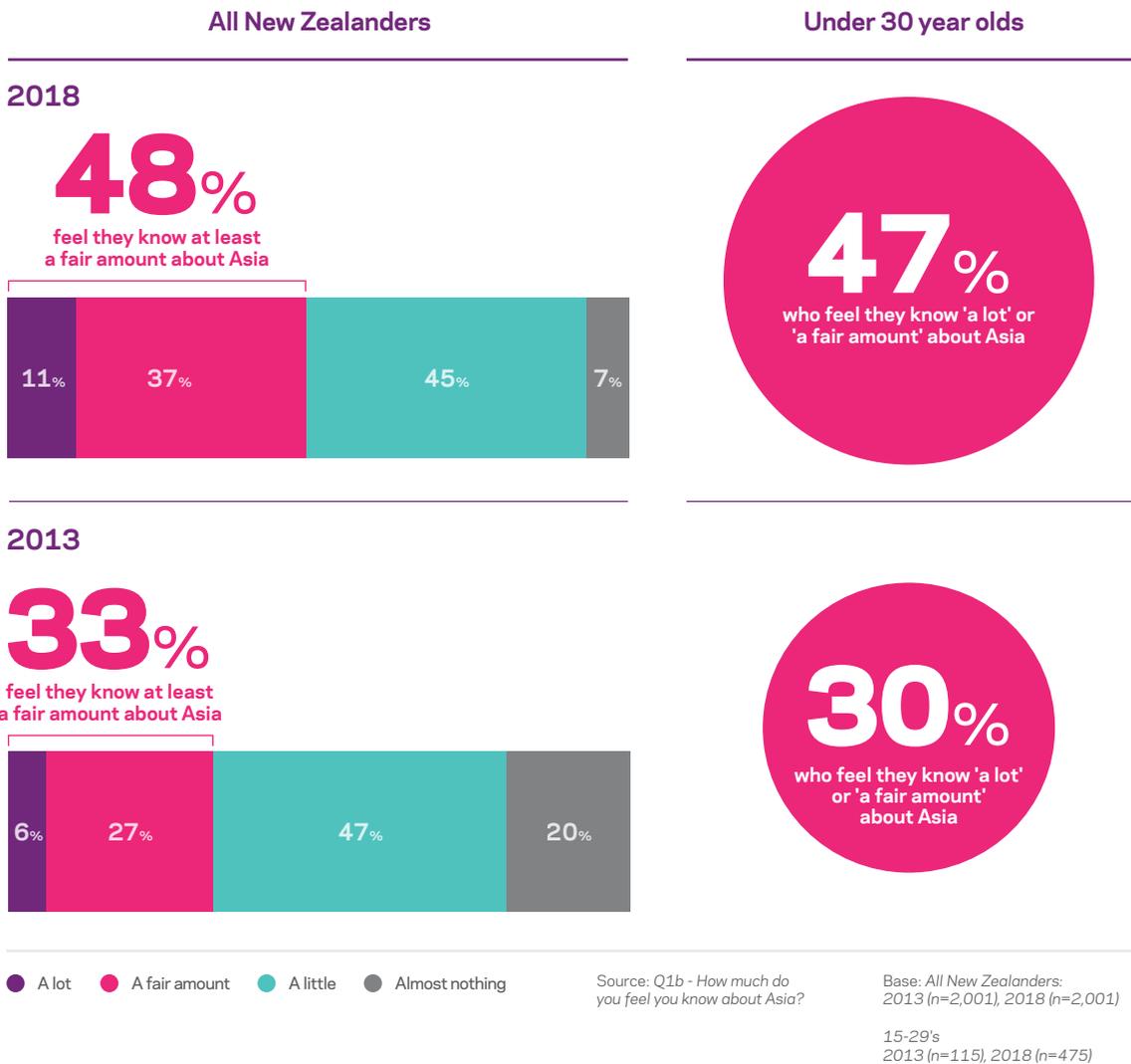
- Almost nothing
- A little
- A fair amount
- A lot

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

Base: All New Zealanders excluding those who answered 'I don't know' (range from n=1933 to n=1971)

Figure 2

How much do New Zealanders feel they know about Asia?



Personal connection with Asia is a driver of knowledge

People with deeper personal connections to Asia, through language, travel, cultural involvement and personal relationships, are more likely to have at least 'a fair amount' of knowledge about Asia. Those with higher levels of self-assessed Asia knowledge include:

- 79 percent of people who speak an Asian language.
- 65 percent of people involved with Asian cultures and peoples.
- 62 percent of people who have travelled to Asia.

Of these categories, there has been marked increase in the number of people involved with Asian cultures and peoples and those who have travelled to Asia compared to 2013. This suggests meeting people and experiencing Asia - made easier by cheaper international travel - is playing an increasingly important role in fostering knowledge of Asia.

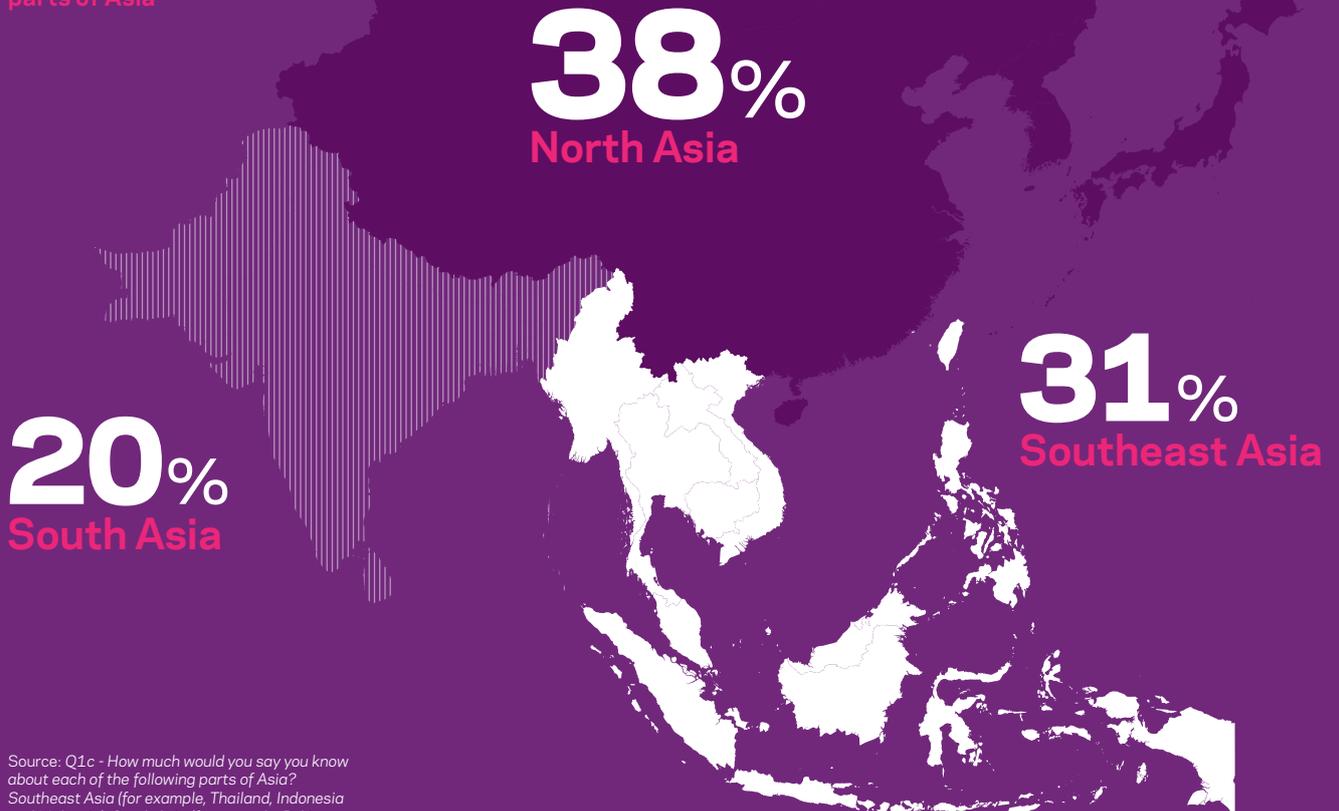
New Zealanders feel they know North Asia best

When looking at Asia by subregion, North Asia continues to be ranked as most familiar to New Zealanders. Thirty-eight percent of respondents say they know at least 'a fair amount' about North Asia (China, Japan, South Korea, North Korea). For Southeast Asia, 31 percent rate themselves as knowing at least 'a fair amount'. South Asia is the least well-known region in Asia, with only 20 percent knowing at least 'a fair amount' about the region – half that of North Asia.

Figure 3

How much do you know about the following parts of Asia?

Percentage of people who know at least 'a fair amount' about the following parts of Asia



Source: Q1c - How much would you say you know about each of the following parts of Asia? Southeast Asia (for example, Thailand, Indonesia and Malaysia); South Asia (for example, Pakistan, India and Sri Lanka); North Asia (for example, China, Japan and North and South Korea).

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

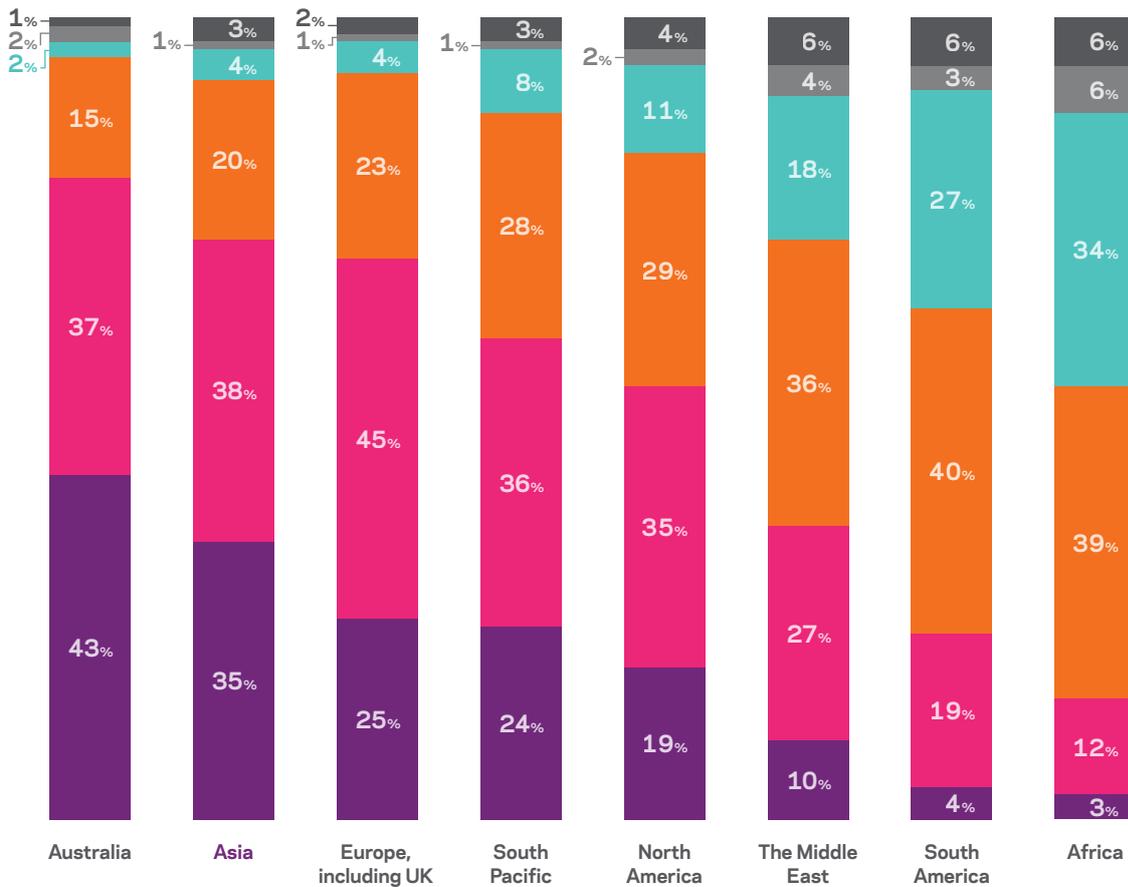
New Zealanders recognise Asia is important to their future

Most New Zealanders recognise Asia is important to New Zealand's future, despite varying degrees of knowledge about Asia.

Asia is second only to Australia regarding perceptions of importance to New Zealand's future. Figure 4 shows almost three quarters of New Zealanders believe Asia is important or very important to New Zealand's future.

Figure 4

How important are each of these places to New Zealand's future?



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

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

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

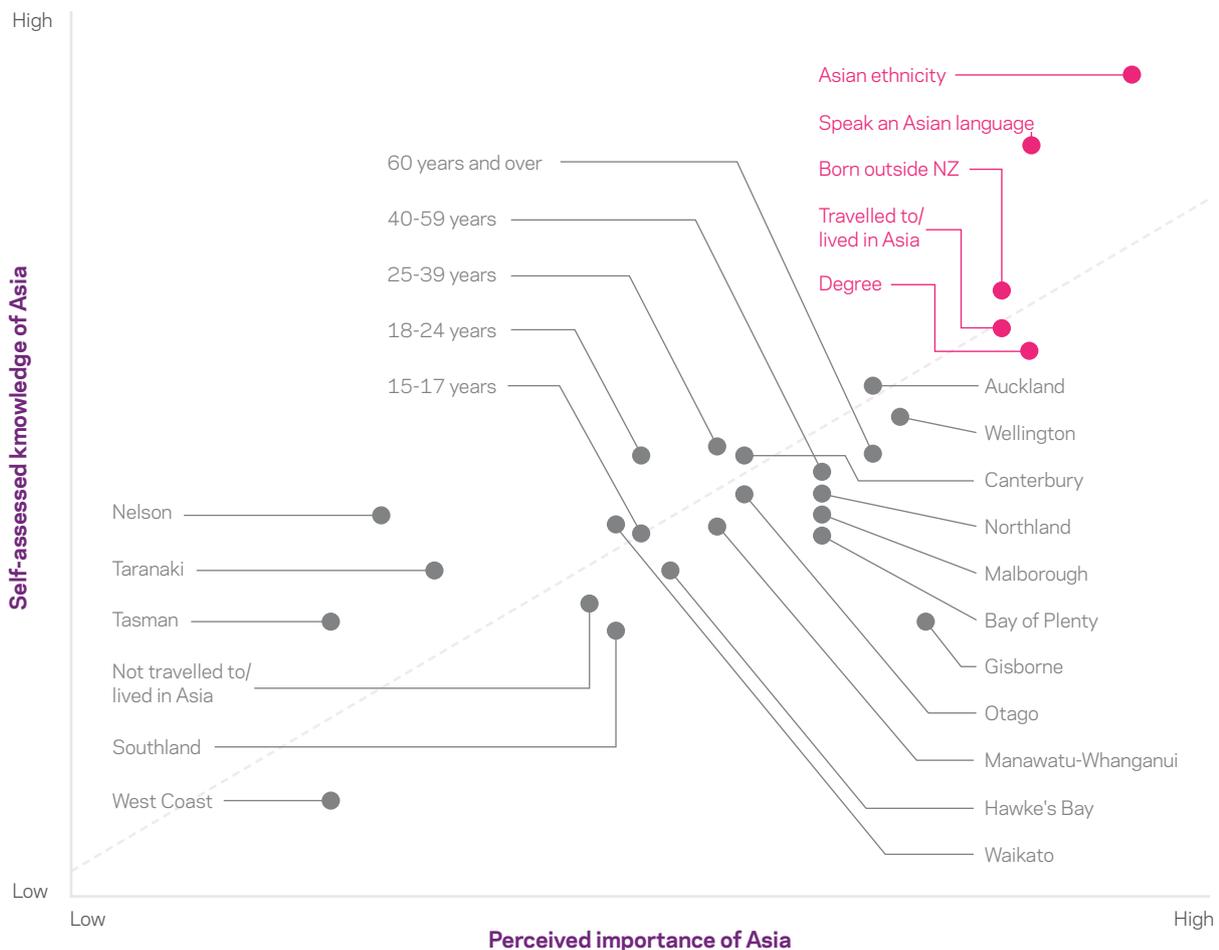
Connections matter

In Figure 5, we look at the relationship between respondents' perception of the importance of Asia, their self-assessed knowledge of Asia and their age, gender, ethnicity, location and personal experiences.

It shows the correlation between those who have greater personal connections with Asia having a deeper knowledge of Asia, and in turn assessing Asia as being of greater importance to New Zealand's future.

In addition to those New Zealanders of Asian ethnicity and/or those who speak an Asian language, travel to Asia and tertiary-level education appear to have the greatest impact on New Zealanders' positive perceptions of Asia as being important to New Zealand's future. Equally, those with lower levels of Asia knowledge tend not to rate Asia as important.

Figure 5
Relationship between self-assessed knowledge of Asia and perceived importance of Asia



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

Q1b - How much do you feel you know about the following regions?

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

Knowing Asia means knowing the opportunities

Knowledge of Asia helps to foster a deeper understanding of the opportunities available in Asia, and better equips New Zealanders to articulate the benefits of engaging with Asia.

During our research we spoke to groups of parents¹ who had varying levels of knowledge of Asia. Those with good knowledge of Asia could better articulate why Asia was important and what opportunities were available to New Zealanders in the region. Those with less knowledge of Asia tended to be less positive and see more risks than opportunities.

"Asia is very important to New Zealand's future. There are opportunities for both me and my kids. It's about more than career though - there's so much we can learn from each other's cultures."

"Asia is important to New Zealand's future. There are opportunities for young people, and it could lead to stuff like jobs and economic growth for all of us. I reckon it would be good to improve tolerance and understanding of different cultures too."

"Asia isn't that important to New Zealand's future. There might be some benefits, like yummy food, cultural festivals, tourism. But I'm not so sure about immigration, it might put up house prices."

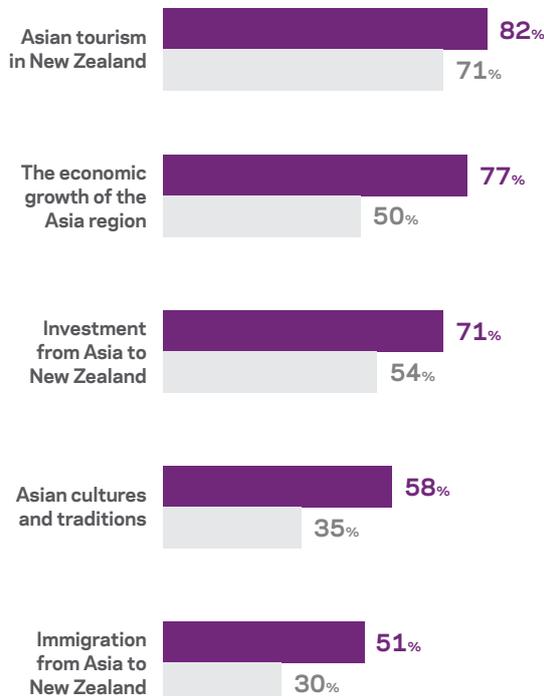
Source: Comments reflect broad themes and feedback from focus group participants

New Zealanders feel the most positive about the impact of tourism from Asia

Taking all knowledge levels into account, New Zealanders rated tourism as having the most positive impact on New Zealand's future over the next 10 to 20 years. This is followed by economic growth in Asia, and then investment from Asia into New Zealand. Those with a high self-assessed level of knowledge about Asia were more likely to be positive about the impact on New Zealand of factors such as immigration, inward investment and Asian culture.

Figure 6

Percentage of people who say these activities will be positive for New Zealand



● Those with a high knowledge
● Those with a low knowledge

Source: Q2b - Thinking about the entire Asia region, and thinking about New Zealand in the next 10 to 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=2,001)

1 For further details on the focus groups see Background, methodology, and sample profiles on page 56.



What enables Asia-related knowledge?



This section draws on survey data and findings from interviews with parents to look at the various factors that influence New Zealanders' knowledge of Asia.

Key findings



Travel has the greatest impact on New Zealanders' general knowledge of Asia, with almost half of all New Zealanders having travelled to or lived in Asia at some point in their lives.

Nearly half of all New Zealanders have a personal connection to people of Asian ethnicity. The main opportunities for interaction are through work, eating out and shopping. For many New Zealanders, particularly those in rural settings, there are limited opportunities to engage with Asian cultures or people of Asian ethnicity.

Learning an Asian language is the most common pathway for young New Zealanders to learn about Asia. Parents suggest that this might change over time, as secondary students use translation apps and take advantage of English being more commonly spoken in Asian countries. One in five New Zealand adults speak an Asian language with the percentage highest for 30 to 39-year-olds (one in four).

Young New Zealanders are very interested in Asia, with this interest peaking in their thirties. As the current group of teenagers and young adults grow older, we can expect higher levels of Asia interest and knowledge to flow through into their thirties.

Social media, peer interactions and Asian entertainment are shifting young people's perceptions and knowledge of Asia. As young New Zealanders become more familiar with Asia, parents' perceptions are changing too.

Nearly half of New Zealanders have travelled to or lived in Asia

Nearly half (48 percent) of New Zealand's population have travelled to, or worked in, Asia at some point in their lives. Young people are less likely to have travelled to Asia (34 percent of those aged under 30 years) compared with 52 percent of those 30 years and over.

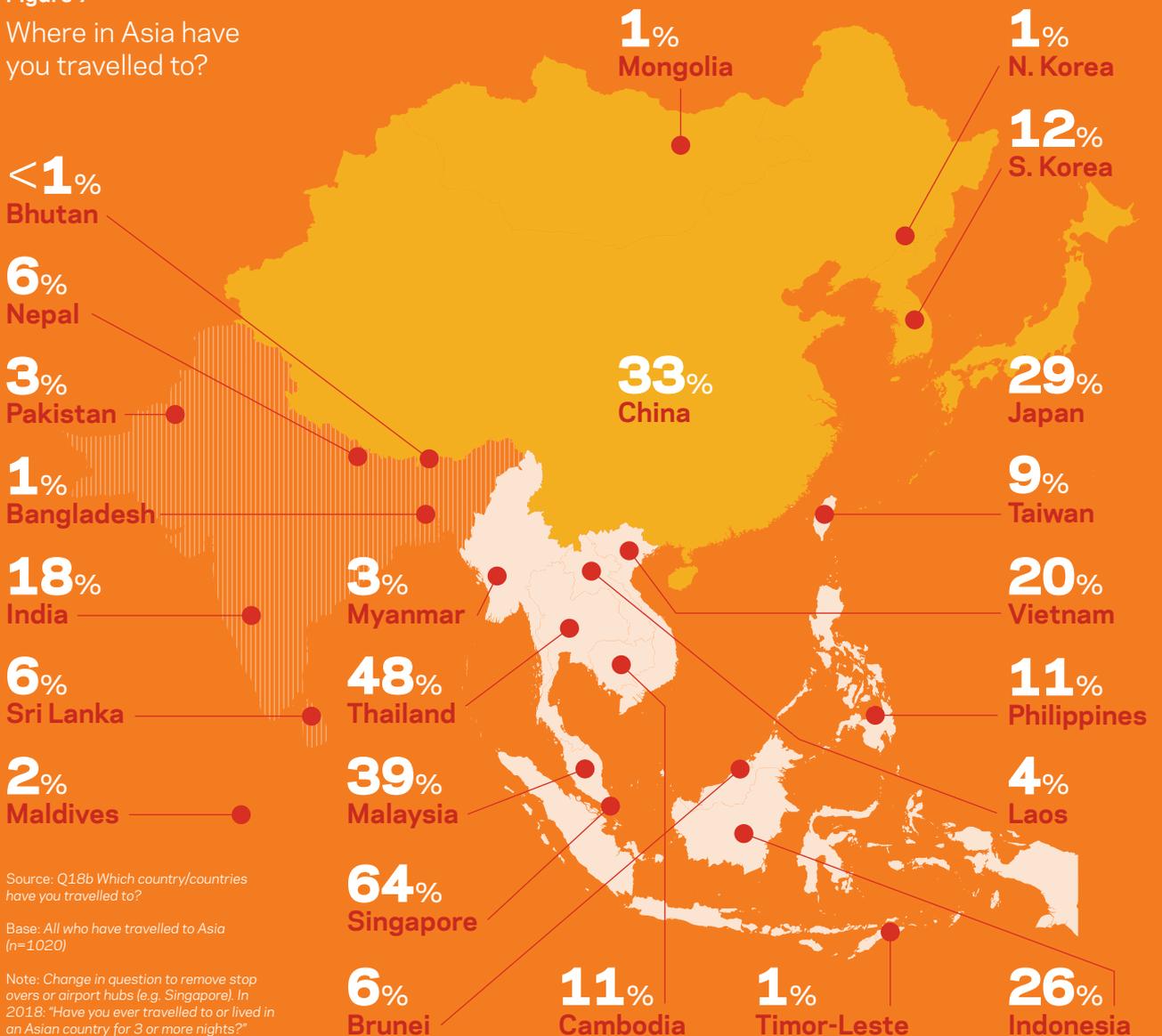
The most commonly visited countries in Asia, for three days or more, were Singapore (64 percent), Thailand (48 percent), Malaysia (39 percent),

China - including Hong Kong (33 percent), and Japan (29 percent).

When asked to describe the main purpose for their most recent trip to Asia, 61 percent of respondents said it was for a holiday (20 days or less). Twenty-three percent said they were visiting friends or family and 14 percent were returning to their home country for a visit.

Figure 7

Where in Asia have you travelled to?



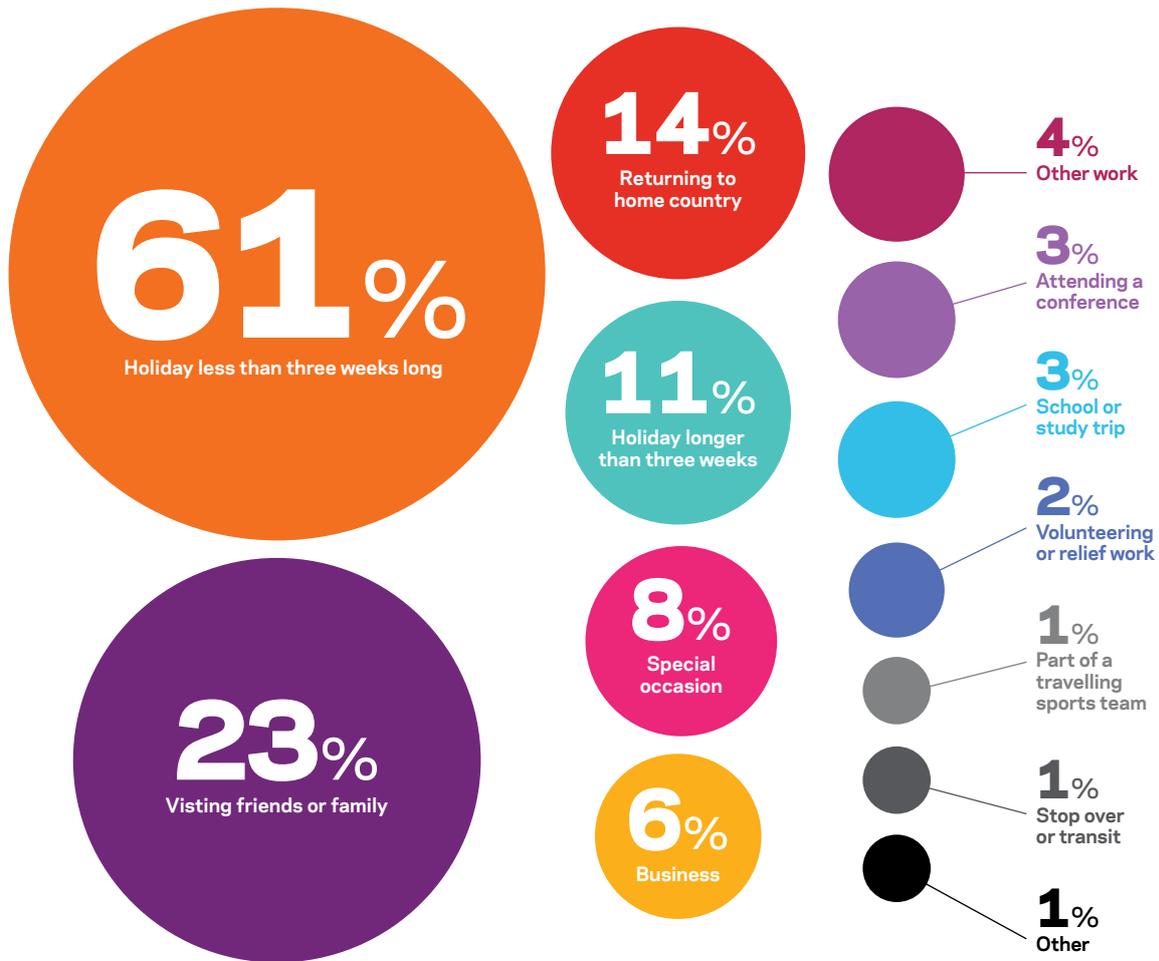
Source: Q18b Which country/countries have you travelled to?

Base: All who have travelled to Asia (n=1020)

Note: Change in question to remove stop overs or airport hubs (e.g. Singapore). In 2018: "Have you ever travelled to or lived in an Asian country for 3 or more nights?"

Figure 8

Why did you travel 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=1,038)

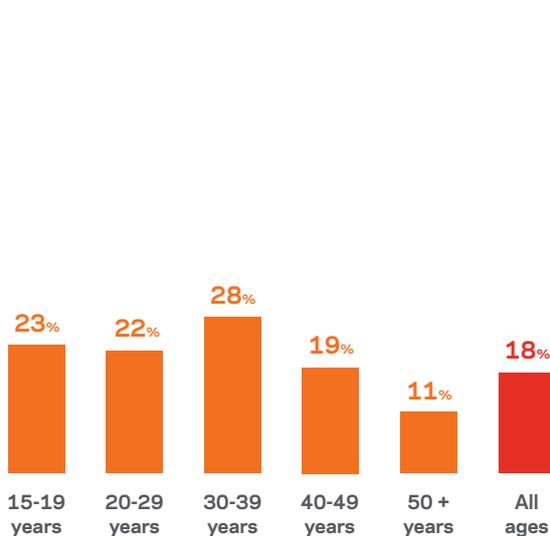
Travelling or working in Asia grows deeper knowledge

Sixty-two percent of New Zealanders who have lived in or travelled to Asia rate themselves as having a high knowledge of the region. By comparison, 34 percent of those who have not lived in or travelled to Asia rate themselves as having a high level of Asia knowledge. With nearly half of New Zealanders living or travelling to Asia in their lifetime, travel is recognised as having the greatest impact on knowledge of Asia.

Almost one in five New Zealanders speak an Asian language

In total, 18 percent of New Zealanders speak one or more Asian languages at a basic fluency level or higher. This is highest for 30 to 39-year-olds, with one in four speaking an Asian language (Figure 9). This age group also has the highest level of travel to Asia (54 percent) and the highest level of personal involvement with Asian cultures and people (18 percent saying they have 'a lot' of personal involvement).

Figure 9
Percentage of New Zealanders who speak an Asian language (by age)



Source: Q22h - Do you speak any of the following Asian languages? Please select them even if you only have a basic level of fluency.

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

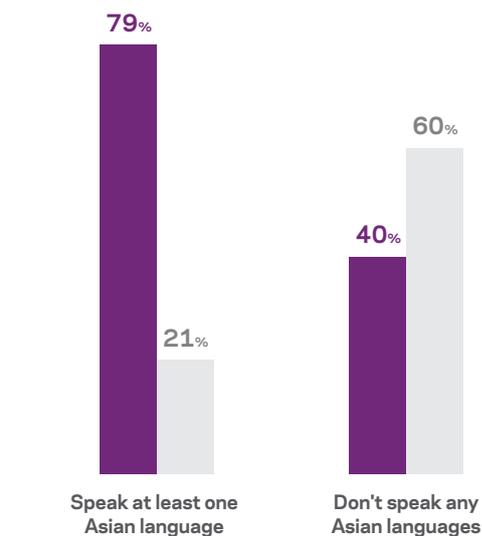
Learning languages is a gateway to Asia

Speaking an Asian language provides an important entry point for young New Zealanders to learn about Asia. While travel has the greatest impact, speaking an Asian language also has a marked impact on New Zealanders' self-assessed knowledge of Asia (see Figure 10).

Eighty-three percent of Asian language speakers think Asia is important or very important to New Zealand's future, compared to 71 percent of non-Asian language speakers.

In the focus groups with parents, many could see the benefits of their children learning an Asian language. However, some said that language is less important now due to translation apps, and the fact that many people in Asian countries speak English.

Figure 10
Correlation between Asia knowledge and language abilities



● High Asia knowledge
● Low Asia knowledge

Source: Q22h - Do you speak any of the following Asian languages?

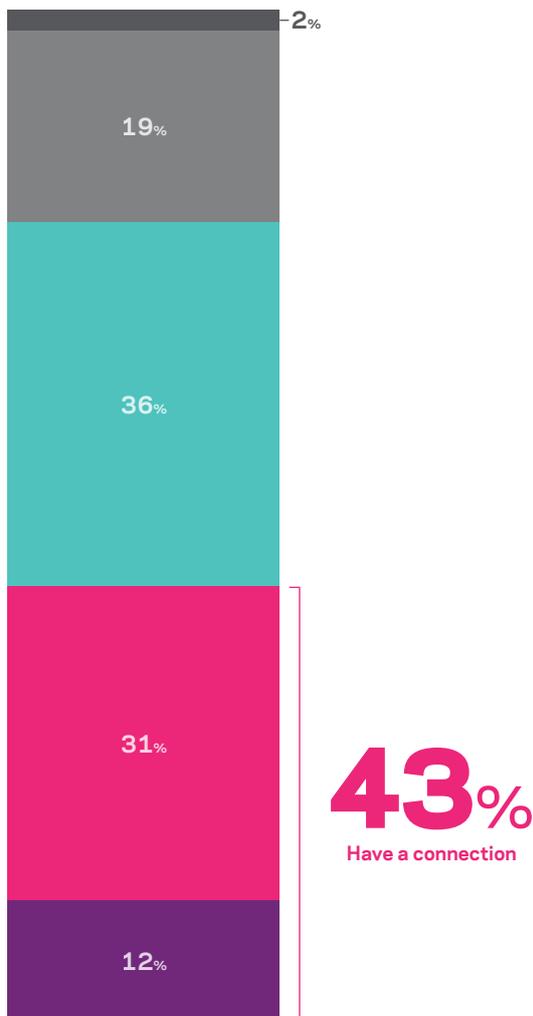
Base: All New Zealanders (n=2,001)

Nearly half of us have a connection to Asia

Forty-three percent of New Zealanders say they have at least 'a fair amount' to do with people who identify as Asian. Fifty-five percent say they have little personal connection, despite many wanting to have higher levels of connection.

Figure 11

How much do you personally have to do with people who identify as Asian?



- Don't know
- Hardly anything
- Not much
- A fair amount
- A lot

Source: Q16a - How much do you personally have to do with people who identify as Asian?

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

The following groups have low levels of personal connection:

- Those who live in Hawke's Bay.
- Those who live in the Bay of Plenty.
- Those who identify as Māori.
- Those who have not travelled to Asia.
- Those who do not view Asia as important to New Zealand's future.
- People aged 60 years or older.

The research also found personal connection with Asian cultures and peoples is a key driver of knowledge. Higher levels of personal interaction with Asian cultures and peoples usually results in high self-assessed knowledge of Asia.

Asia from a Te Ao Māori perspective

Last year we decided to take a closer look at perceptions of Asia and Asian Peoples from a Te Ao Māori perspective.

Māori have always been included in our general surveys, but we wanted more in-depth information on Māori views to look at how they differed from those of the general population and where the opportunities were.

After talking with more than 1400 Māori aged 15 or over, Ihi Research found a very strong sense of cultural connection with parts of Asia. Shared cultural values such as valuing kaumātua, manaakitanga and food customs provide great potential cut-through for Māori and Asian cultures.

The research also showed there was some work to be done - Māori didn't feel confident in their Asia knowledge, and many felt that Māori weren't benefitting from New Zealand's economic and cultural engagement with Asia.

More on the report at:

www.asianz.org.nz/news/maori-could-have-the-edge-on-asia/

Personal interactions happen mostly at work or in retail

On a day-to-day level, New Zealanders are connecting with people of Asian ethnicity mostly through their workplace or in retail outlets (e.g. eating out, shopping).

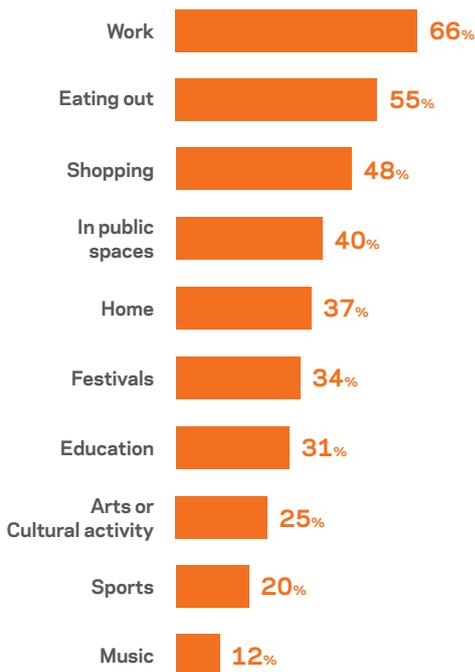
We asked those 43 percent of respondents who had 'a fair amount' or 'a lot' of personal interaction with people of Asian ethnicity to tell us where they had the opportunity to connect.

As seen in Figure 12, most interactions occur at work (66 percent), closely followed by eating out (55 percent, down six points from 2013) and shopping (48 percent, down 13 points from 2013).

Other places where personal interactions take place include public spaces (40 percent) or at home (37 percent). One in four said they interacted via arts or cultural activities.

Figure 12

Where do you interact with Asian people or cultures?



Source: Q16b - Where do you interact with Asian peoples or cultures?

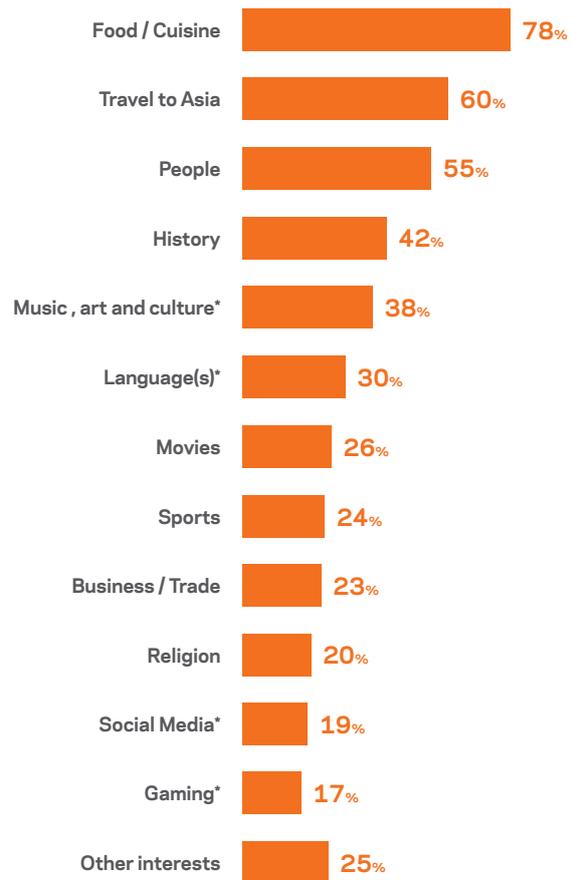
Base: All those who are involved with Asian people/cultures (n=942)

Food and travel remain the most popular Asia-related interests

Most New Zealand adults (88 percent) have at least one Asia-related interest. As seen in Figure 13, food/cuisine is still the most popular Asia-related interest for 78 percent of adult New Zealanders. Travel (60 percent) and connecting with people of Asian ethnicity and Asian cultures (55 percent) are the next highest Asia-related interests.

Figure 13

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



Source: Q13 - Do you have any of the following Asia-related interests?

Base: All New Zealanders (n=2,001) * note item wording was changed in 2018

Asia-related interests peak for New Zealanders in their thirties

The number of Asia-related interests a person has is strongly related to their age. The average number of interests (out of the 13 potential interests presented in the survey) is highest for 15 to 39-year-olds (averaging between five and six). It peaks in the 30-39-year-old age range before declining for people aged over 40 years.

Social media and entertainment make Asia more accessible

Social media, interactions with peers of Asian ethnicity and the accessibility of Asian entertainment are increasing young New Zealanders' knowledge of Asia.

Parents in focus groups reported their children were gaining a greater understanding of Asia through interactions with other students, social media, school exchanges, food and the accessibility of Asian entertainment. In turn, parents were also learning about Asia as a result of their children's experiences and interactions, including what they listen to and watch.

Online influences mean Asia is now seen as creative and innovative

The information being accessed by young New Zealanders is influencing their own and their parents' perceptions of Asia.

Parents noted that social and entertainment media was portraying Asia as more creative and innovative than they previously perceived, which in turn was making them have a more positive impression of Asia.

The sources of Asia-related influences - as reported by parents - were varied, ranging from connecting with other young people in Asia via online gaming or social media; to film, music, fashion, books and technology; to meeting people through international student exchanges.

"[K Pop] is giving Asia a different light. Asia is not really well known for the hip-hop or that kind of genre of dance but now the light is shining on Asia in terms of their creativity. They're thinking outside the square. Japan has these girl heavy metal bands that are massive and it's like they're really embracing the difference."

"My daughter's favourite movie is Crazy Rich Asians and she must have watched that five times, and now she is interested in these beautiful Asian celebrity ladies."

"My children follow Dragon Ball Z and we travelled all the way to Hong Kong and went through hours and hours of the market just to find the little figurines and then we went out on the weekend to watch the movie."

"[My daughter] enjoys Chinese food. We look after Japanese boys when they come over to learn how to play rugby. Probably travel is another thing."

"Cultural exchange is pretty cool because if you can immerse yourself in it and exchange then you find out that people are pretty similar really and not to be frightened or prejudiced."

"The Chinese New Year that is coming up, the Diwali, all these cultural festivals. It's really important to have those sorts of culture days. You can go and get amongst it."

"[Marie Kondo] has somehow managed to put it on Netflix, that's how you organise your drawers. So, you're actually watching it and whether you realise it or not you are getting this massive dose of Japanese culture and some people pick up on that and go I want to know some more about that."



Is enough being done to improve Asia-capability for the benefit of the New Zealand economy?



This section explores perceptions about the impact of Asia on the New Zealand economy and business, and the extent to which 'Asia-capable' skills are being developed to meet opportunities in the Asia region.

Key findings



New Zealand's economic relationship with Asia is viewed positively. Asian tourism to New Zealand (76 percent), economic growth in the Asian region (65 percent) and investment into New Zealand (62 percent) are understood to have somewhat or very positive implications for New Zealanders.

Under 30-year-olds are less positive about Asian economic growth but are very aware that more should be done to make them Asia-capable. This is consistent with 2018 research, *Thinking Careers? Think Asia*, which found that only one in three 16 to 25-year-olds had received Asia-focused career advice (See *Young people unprepared for Asia careers* on page 26).

There has been a significant rise in the percentage of New Zealanders saying not enough is being done to develop links between businesses in New Zealand and Asia. In 2013, 30 percent thought not enough was being done. This has increased to 46 percent in 2018.

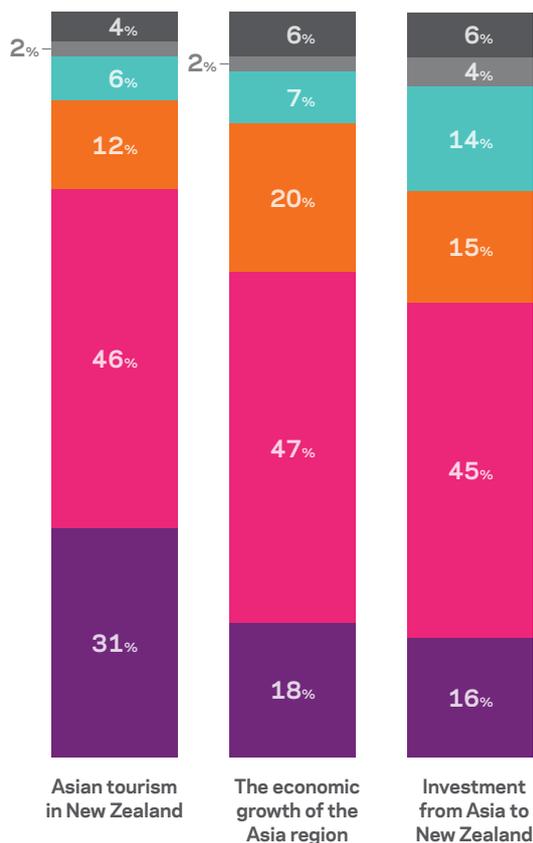
Many parents feel greater cultural understanding is inevitable in the future. They see first-hand how their children interact with different cultures in their everyday lives and that their own views of the world are changing as a result. They also recognise that many of the skills that align with Asia-capability will be essential for their children in the future.

Most New Zealanders view economic activity with Asia positively

New Zealanders are generally positive about the impact of Asia on our economy. Most people continue to think Asian tourism, economic growth and investment will have a positive impact on the future.

Figure 14

What impact will these activities have on New Zealand's future?



- Don't know
- Very negative
- Somewhat negative
- Neither positive nor negative
- Somewhat positive
- Very positive

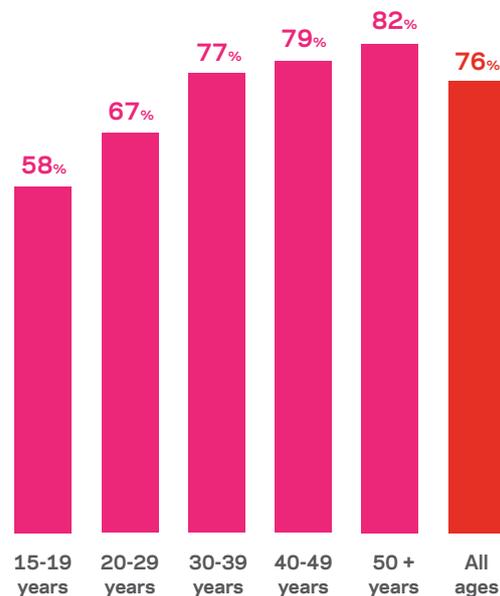
Older people are more positive about Asia's economic impact

Over 50-year-olds are more positive about the impact of Asian tourism and of economic growth in Asia on New Zealand than younger New Zealanders are.

There are some significant generational differences in perception about the economic effects of Asian tourism into New Zealand (Figure 15) and Asia's growth on New Zealand (Figure 16). Under 30-year-olds are less positive than older age groups about both tourism and Asia's economic growth.

Figure 15

Percentage of people who feel Asian tourism will be positive for New Zealand (by age)

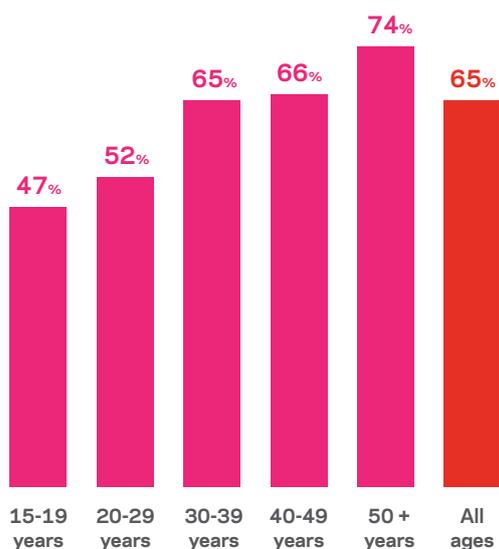


Source: Q2b - Thinking about the Asia region, and thinking about New Zealand in the next 10 - 20 years, what kind of impact do you think each of the following will have on New Zealand's future?

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

Figure 16

Percentage of people who feel economic growth in Asia will be positive for New Zealand (by age)



Source: Q2b - Thinking about the 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=2,001)

Young people unprepared for Asia careers

Thinking Careers? Think Asia was a short research report that quizzed young people on the opportunities available to them in Asia.

Of the nearly 600 young people who took part in the Colmar Brunton survey, about a third agreed that Asia was important to their future career.

But a third also felt that not enough was being done to prepare young New Zealanders to engage confidently in Asia.

More than 40 percent of young people could name an economic reason Asia was important, and just over 20 percent named a cultural reason.

However, more than half couldn't name a career pathway associated with Asia and just one in three had received any Asia-focused career advice.

More on the report at:

www.asianz.org.nz/research/thinking-careers-think-asia/

Most people feel that not enough is being done to make New Zealand Asia-capable

The majority of New Zealand adults believe that not enough is being done to improve New Zealanders' abilities to engage in Asia.

- 54 percent think not enough is being done to prepare young New Zealanders to engage confidently with Asia, with a further 25 percent being unsure.
- 46 percent think not enough is being done to develop links between businesses in New Zealand and Asia, with a further 30 percent being unsure.
- 54 percent think not enough is being done to help New Zealanders understand Asian cultures and traditions, with a further 21 percent being unsure.

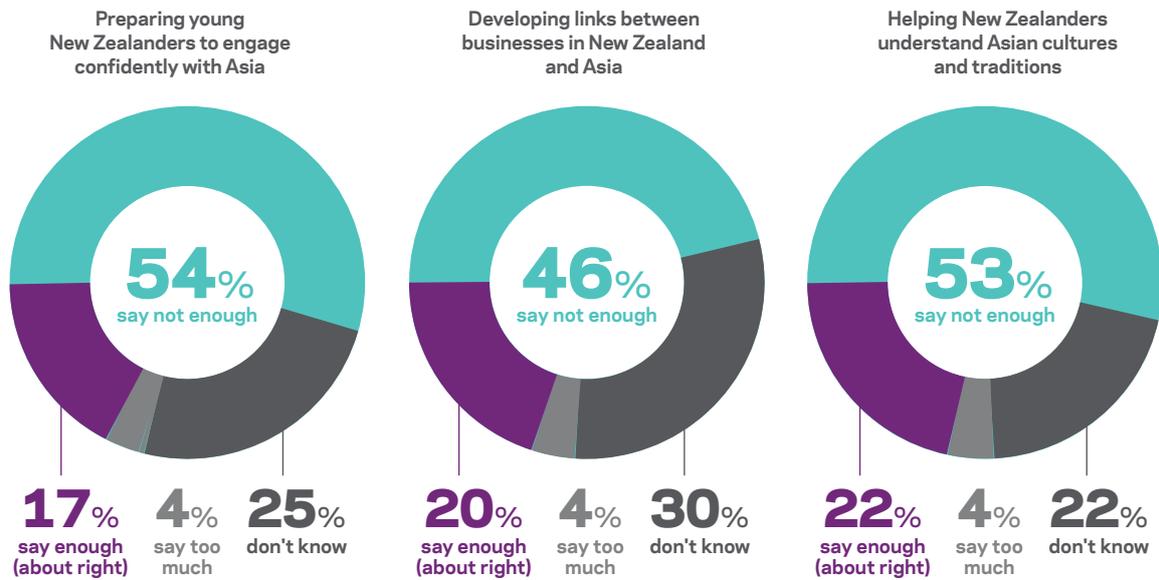
These results are consistent across the different age groups. This suggests that people under 30 who were less positive about the economic impact of Asia may also believe that they are not being adequately equipped to take advantage of opportunities.

This trend is consistent with the findings from *Thinking Careers? Think Asia* research.

- Only one in three young New Zealanders aged 16-25 years (with NCEA level 1 or higher qualifications in New Zealand) had received Asia-focused career advice.
- The impact of this was the finding that 41 percent of these young people were classified as 'Asia-disengaged' - they did not see Asia playing a role in their future career.
- Of this disengaged group, 81 percent had not received any Asia-focused career advice.

Figure 17

Do you think enough is being done to equip New Zealanders to engage in Asia?

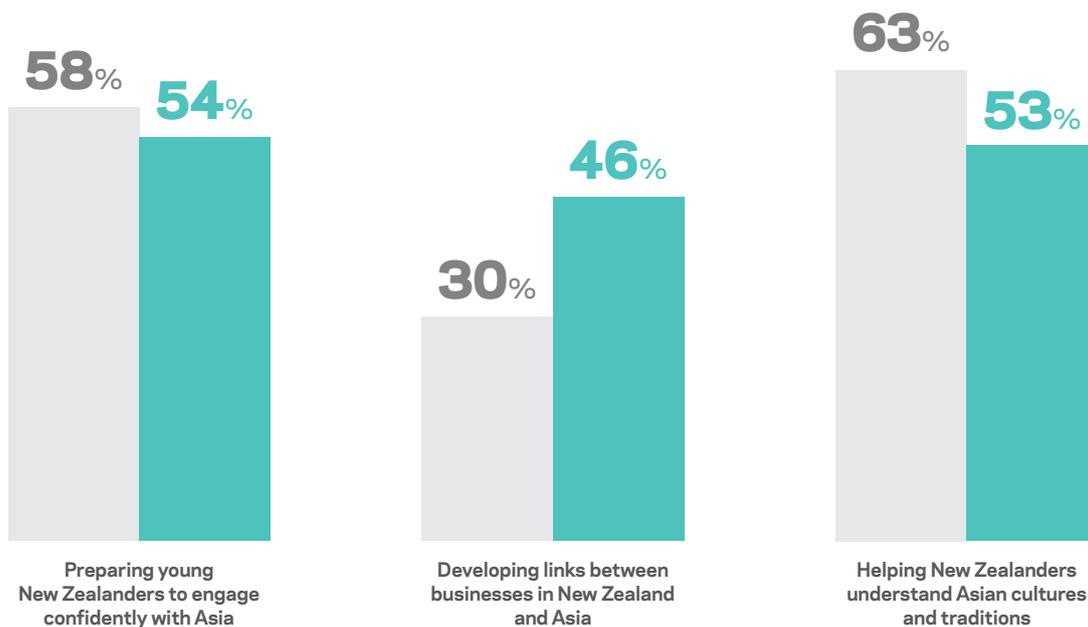


Source: Q14 - From what you already know, do you think enough is being done in the following areas?

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

Figure 18

Percentage of people who think not enough is being done in these areas: 2013 and 2018 comparison



● 2018
● 2013

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

Base: All New Zealanders - 2013 (n=1,000) 2018 (n=2,001)



More needs to be done to improve business links

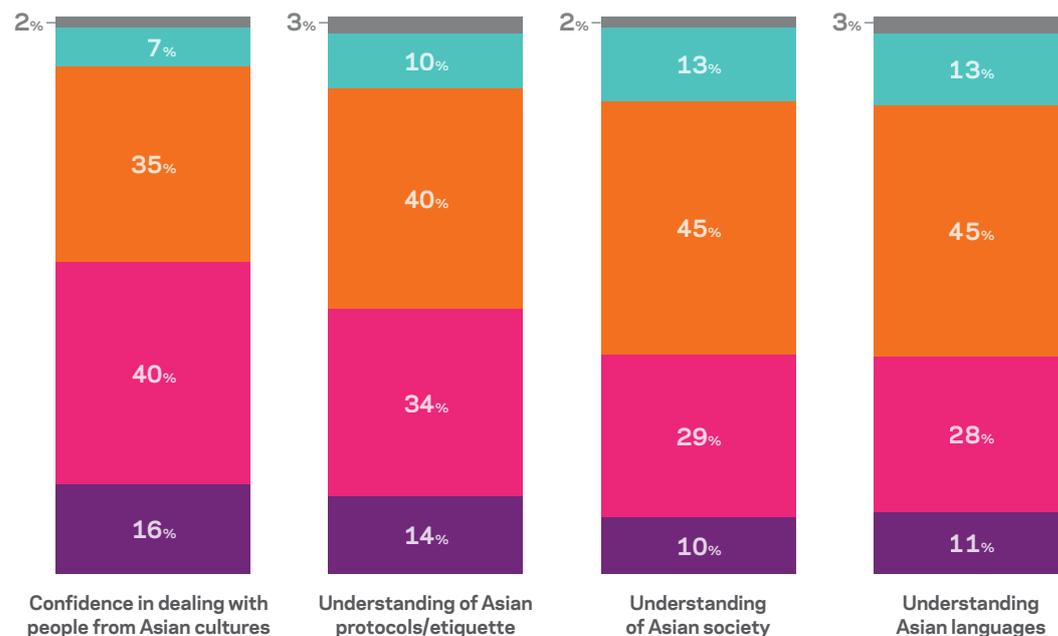
In the last five years, there has been a 16 percentage point increase in people who feel not enough is being done to develop links between businesses in New Zealand and Asia.

Thirty percent of respondents in 2013 thought not enough was being done to develop links between businesses in New Zealand and Asia (see Figure 18 on the previous page). By 2018, this figure had increased to 46 percent.

In the same five-year period, there has been a nine-percentage point decline in people who believe not enough is being done to help New Zealanders understand Asian cultures and traditions (63 percent in 2013, 54 percent in 2018).

Figure 19

How important do you think Asia-related skills are for New Zealand's future workforce?



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

Asia confidence is an important workforce skill

Confidence and understanding of Asian cultures, people and protocols are important skills for New Zealand's future workforce (Figure 19).

More than half of New Zealanders rate confidence in engaging with people from Asian cultures as the most important Asia-related skill for New Zealand's future workforce (56 percent rate it as important or very important). In addition to this, we found:

- 47 percent of respondents thought that understanding protocols and etiquette was important or very important for New Zealand's future workforce.
- 39 percent believed that understanding Asian society was important or very important for New Zealand's future workforce.
- 39 percent said understanding Asian languages was important or very important for New Zealand's future workforce.

Source: Q13 - How important are Asia-related skills (languages, understanding of Asian society, history, economies) for our future workforce and the career path of New Zealanders?

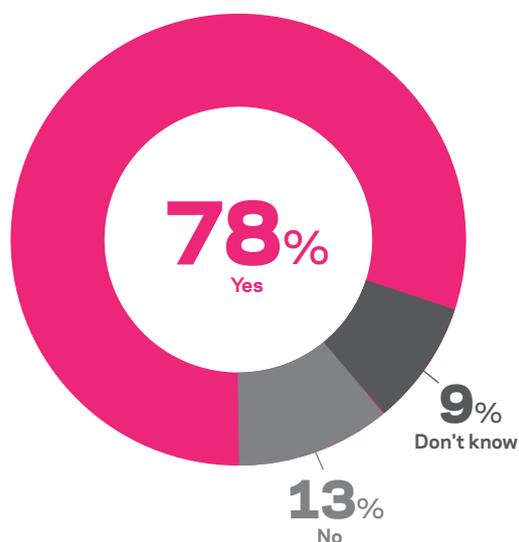
Base: All New Zealanders (n=2,001)

New Zealanders know language learning brings benefits

Most New Zealanders (79 percent) think learning a foreign language would benefit New Zealand children (see Figure 20).

Figure 20

Would New Zealand children benefit from learning a foreign language?



Source: Q20a - Do you think it would be beneficial for New Zealand school children to learn a foreign language i.e. Not English and Te Reo?
Base: All New Zealanders (n=2,001)

Of those who did not think learning an Asian language would be beneficial:

- 15 percent thought it should be optional or up to the individual.
- 15 percent said they would never use it.
- 10 percent felt New Zealand should be promoting te reo Māori first.
- 7 percent thought English was a universal language.
- 7 percent said English and te reo Māori are our official languages and we should focus on these.
- 6 percent felt there were more important subjects to teach.

Parents in favour of Asian languages

Parents in focus groups said their children were showing greater interest in learning an Asian language (although this could be achieved online or through travel, rather than at school) and that it was the children themselves who were deciding which languages they should learn.

Parents recognised the value of their children learning an Asian language compared to, for example, French, German or Latin.

Out of all the Asian languages, many parents thought Mandarin would be most useful because of the size of the Chinese market and number of Chinese migrants in New Zealand. Others noted that Japanese had the same vowels as te reo Māori, and therefore Japanese would be another good language to learn.

Parents noted that learning a new language was strengthened when it also included culture, protocols and etiquette, as this was considered important in showing respect and understanding, especially for those people who were in an industry or business with a lot of interaction with people of Asian ethnicity.

"We have got 200 people in our factory and probably well over a third of those on the shop floor are Filipino. They're just the coolest people. They turn up every day happy and they're just awesome. So, from an employer point of view, it would be great to understand their culture and potentially their language. And there would be lots of industries where they come over here and contribute."

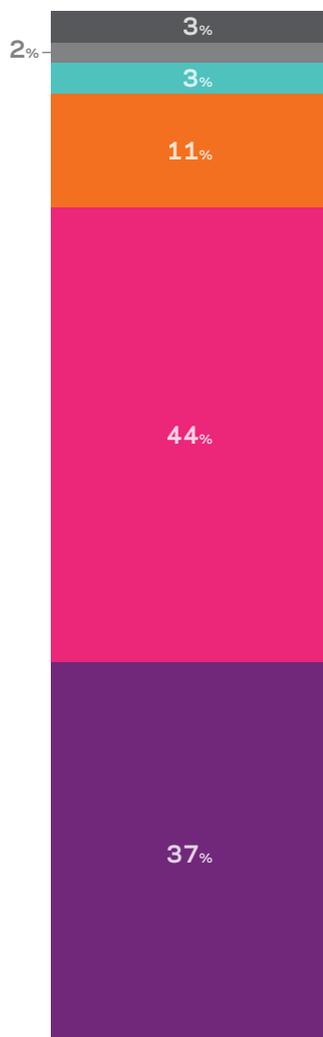
"It's probably less important to know or to learn the language, but part of learning a language is you learn a lot more about the culture and the countries. I think that is probably more important in business to understand the cultures of the countries."

Source: Parent focus groups

New Zealanders' interest in understanding Asian cultures and countries is reflected in Figure 21 as well. It shows 81 percent of people think developing cultural and economic ties with Asia is important or very important.

Figure 21

How important is it for New Zealand to develop cultural and economic ties with Asia?



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

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?

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

Improving Asia-capability requires a change in mindset

Parents in focus groups felt that if New Zealanders want to boost their capabilities to engage and thrive in Asia, they will need to stop focusing on the perceived negative impacts of local interactions and instead embrace the international opportunities presented by Asia.

"Being 'Asia-capable' is embracing change, experiencing new things and open-mindedness. 'Not Asia-capable' is staying in the old conventional way - not moving forward with the world, being close-minded."

"With Asia-capability, New Zealand has wealth, friendship, partnership, trade to Asia and the rest of the world, sharing, community, understanding and new technology."

"New Zealand people are smart but not wanting to learn about the cultures of China, Japan and Korea. They enjoy so much the comfort zone and isolating themselves from the world."

"My daughter is in her last year of high school. She doesn't really know what she wants to do. She didn't really see the importance of being Asia-capable."

"Children appreciate there is a big world out there and a lot of our stuff is made in China and they understand that, but I don't know whether they think their career could be enhanced if they made an effort to learn."

Source: Parent focus groups

Many parents feel understanding different cultures will be more common in the future

Parents think cultural exchange and mixing with others will happen more among future generations through personal connections and internet-based communities.

"My children actually come home and talk to me about it. It's not me talking to them. They come home with ideas and say 'do you know this about Japan or China?'"

"With my son he will sit there when he gets home from work and he will be straight on the computer and he will be on some website gaming. He is talking to other people from Asia, he knows more about other cultures through gaming because the way they connect, they're learning stuff."

"The 19 or 22-year-olds, they're young and open to change so ok let's get the Asians in and do things like the eating of insects, schools that encourage acrobatics and martial arts more. More cultural diversity, training in Buddhism or Sikhism, education, clothes, so there are Kiwis wearing Chinese clothes, sort of like a mix up, crafts, special effects, Bollywood, music, fashion and unique global opportunities where there is a mixture of the ideas of the Chinese and New Zealand bringing some more wealth into the country, being open to more Asian ideas and brainstorming as a team. Stronger connections and engagement, really connecting. So maybe a few more generations and that will happen."

"The world is a global village now and my daughter knows how competitive things are."

Parents support the idea of more Asia content in schools

Parents support the idea that New Zealand schools should foster a greater understanding of Asian societies, histories, economies and politics, and also where our histories intersect, such as early Chinese immigration to New Zealand.

"You have to go right back to our history with Asia and how we treated the Chinese immigrants when they first came here. You have got to start with your own history before you start going anywhere else. You have got to get a real understanding of New Zealand's relationship with Asia or the Asia community to understand and appreciate the injustice that was done. It's no use going somewhere else, fishing in other waters if you don't know where you have come from and what has happened within your own country."

"I have read a couple of books on Chinese history, it's a fascinating culture, Chinese medicine. Their seamanship - they conquered the world long before the Europeans did. All that is all fascinating."



How is media influencing New Zealanders' perceptions of Asia?



This section looks at the media sources shaping New Zealanders' perceptions of Asia, the messages being received, the sentiment of those messages, and the role of social media in sharing stories about Asia.

Key findings



The Asia narrative presented by New Zealand media is now more positive than it was five years ago. However, the number of people who recall having seen, heard or read about Asia-related events over the previous three months has fallen from 70 percent in 2013 to 40 percent in 2018.

Social media is an increasingly important channel for accessing information about Asia. While traditional media such as television, radio and print newspapers are still the main source of Asia-related information for 65 percent of New Zealanders, social media is now the third most important source (42 percent) and the leading source for under 30-year-olds (61 percent compared to 58 percent for traditional media).

Sharing of Asia-related information through social media is growing. Almost one in five New Zealanders (18 percent) had shared information about Asia through social media in the previous three months (33 percent for 30 to 39-year-olds). The stories being shared reflect a wide range of topics, with a strong leaning to experiences such as travel to Asia, Asian recipes, festivals and events.

New Zealanders are receiving more positive news about Asia

In 2013, 70 percent of New Zealanders had seen, heard or read about Asia-related events in the previous three months (see Figure 22). Most of these stories (34 percent) were seen to be negative in their sentiment, with 52 percent being a mix of negative and positive coverage. Only 12 percent were perceived as mostly positive in their portrayal of Asia.

By 2018, the number of people who had seen, heard or read about Asia-related events over the previous three months had fallen to 40 percent.

However, New Zealanders felt the sentiment toward Asia in this reporting was more positive. Forty-one percent said the information received was positive and 48 percent said it was neutral (or a mix of both positive and negative sentiment). Only eight percent said the information about Asia-related events was negative: a 26 percentage point decline. Notably, this shift in perception is consistent across all age groups.

Figure 22

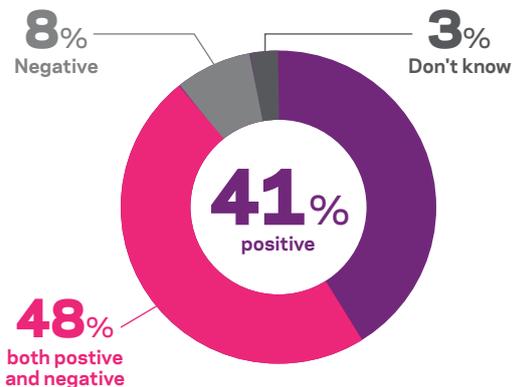
Have you seen, heard, or read anything about Asia-related events, issues or people in the last three months?

Was this information mostly positive, mostly negative or both positive and negative?

2018



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

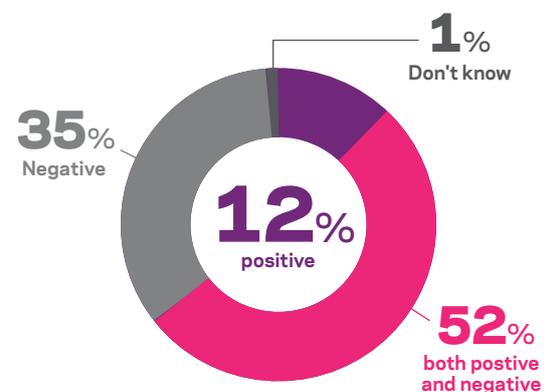


Base: New Zealanders seen/heard Asia-related information past 3 months (n=850)

2013



Base: All New Zealanders (n=1,000)



Base: New Zealanders seen/heard Asia-related information past 3 months (n=723)

Source: Q26a - Have you seen, heard, or read anything about Asia-related events, issues or people in the last three months? Q26c - Would you say this information in the last three months was mostly positive, mostly negative, or both positive and negative?

Traditional media remains the most common source of information about Asia

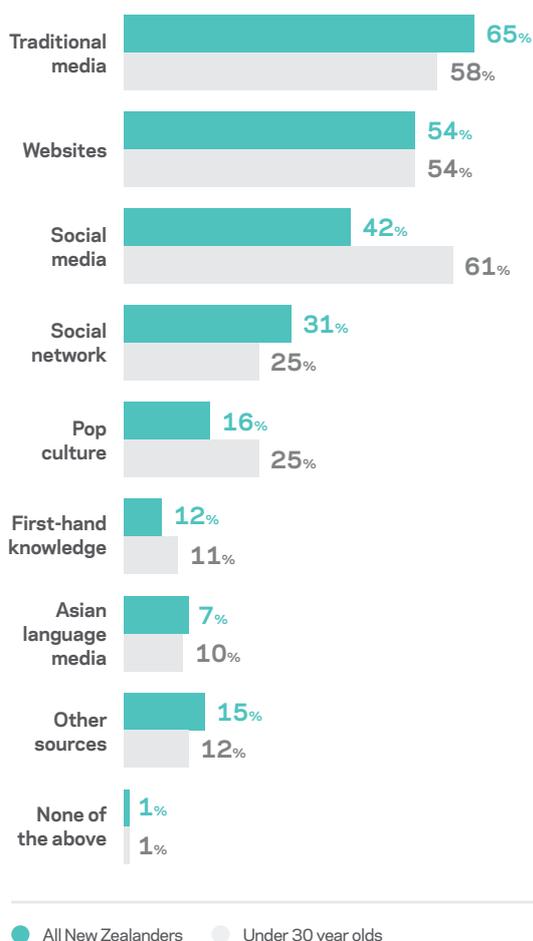
New Zealanders who had seen, heard or read about Asia-related events in the past three months were asked where they had received this information.

Eight different information channels were provided as options:

- Traditional media - television, radio, print newspapers and magazines.
- Websites - online newspapers and magazines, blogs and other news or media websites.
- Social media - Facebook, Twitter, podcasts, etc.
- Social network - family, friends and co-workers, etc.
- Pop culture - movies and television, documentaries, games, books, music and other pop culture sources.
- Other - advertising, international events e.g. sporting events.
- First-hand knowledge - living in Asia, work, school and travel.
- Asian language media in New Zealand.

Traditional media was ranked as the main source of Asia-related information with 65 percent of New Zealanders having learned about Asia-related events through this media channel (see Figure 23). Websites and social media sources were ranked as the second and third most common means for New Zealanders to get news about Asia, at 54 percent and 42 percent respectively.

Figure 23
Sources of Asia-related information



Source: Q26b - Where have you received most of your information about Asia-related events, issues or people in the last three months?

Base: New Zealanders seen/heard Asia-related information past 3 months (n=850)

Young people are learning about Asia primarily through social media

While the majority of New Zealanders are accessing Asia-related news through traditional media sources, under 30-year-olds are much more reliant on social media (61 percent) and pop culture (25 percent).

This finding is consistent with the responses provided by parents in focus groups, who noted the marked shift between their generation's use of traditional media sources and younger generations' move to online sources.

Most people seek balance in their media sources

Most people look for a balance of New Zealand and international media sources when understanding Asia-related events, issues or people.

Almost half (46 percent) get their Asia-related information from a mix of international and New Zealand media. Another 42 percent get their information about Asian-related events, issues and people from a mostly New Zealand perspective. A minority, 11 percent, get their news primarily from international media sources.

Ethnicity influences media consumption

The research showed variations in where different ethnic groups sought news about Asia-related events, issues or people. For example, the percentage of people who name international media as their main news source:

- New Zealand European - 7 percent
- Pacific peoples - 8 percent
- Māori - 13 percent
- Asian New Zealanders - 24 percent
- Other ethnicities - 24 percent

One in five New Zealanders have shared Asia-related material on social media

Eighteen percent of New Zealanders have shared material about Asia on social media in the last three months.

The group who shared the most Asia-related information on social media was 30 to 39-year-olds:

- 15 to 19 years (13 percent).
- 20 to 29 years (21 percent).
- 30 to 39 years (33 percent).
- 40 to 49 years (15 percent).
- 50 years and over (13 percent).

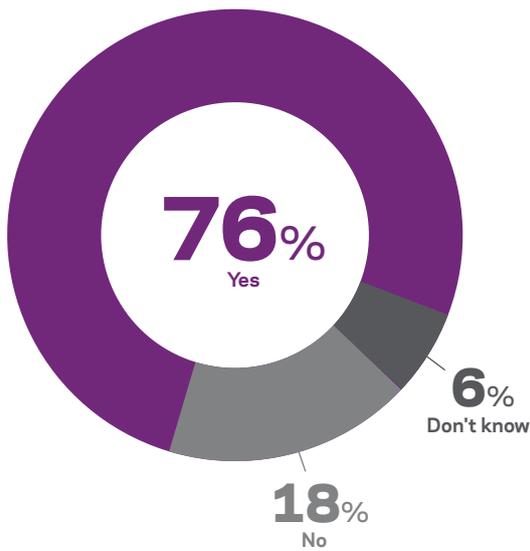
New Zealanders of Pacific and Asian ethnicities were also sharing more via social media at 33 percent and 37 percent respectively.

The stories New Zealanders are sharing vary in both content and outlook

Social media sharing of Asia-related information involved a wide range of topics and sources - both local and international and includes sharing personal experiences related to Asia (Figure 24).

Figure 24

Have you shared anything about Asia on social media in the last three months?



Source: Q27a - Have you shared material about Asia on social media in the last 3 months?

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

What did you share?



Source: Q27b - What did you share on social media?

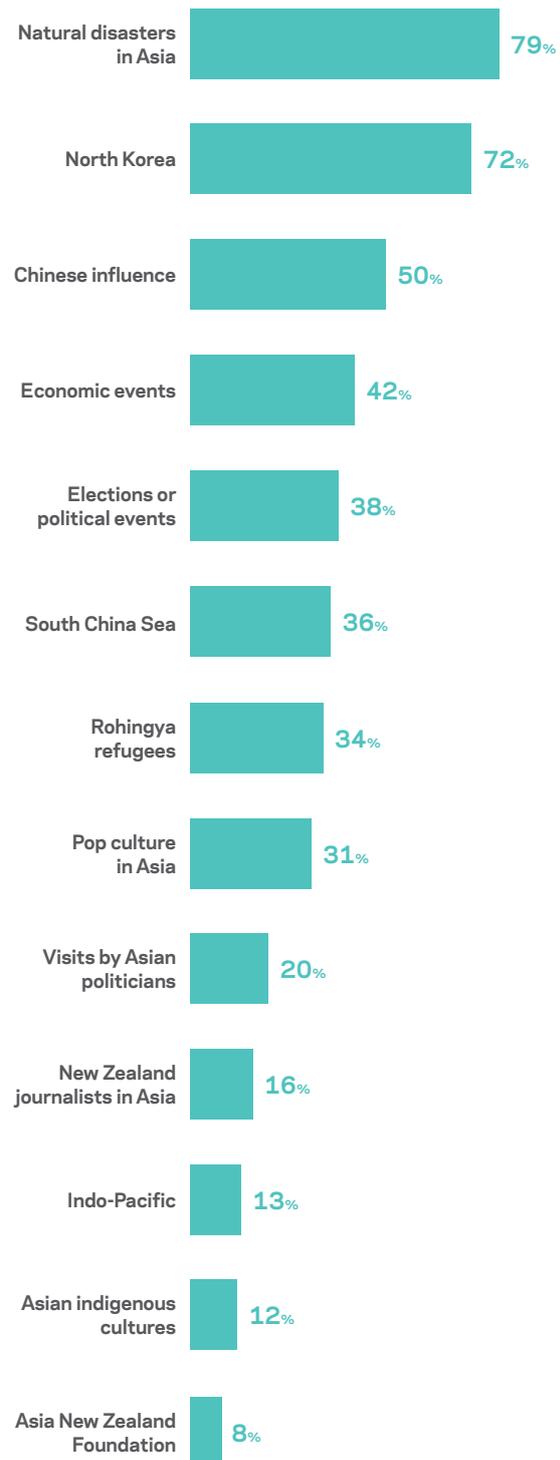
Base: People who shared material about Asia on social media (n=190)

Natural disasters and North Korea most recalled news

Of the 40 percent of New Zealanders who recalled seeing, hearing or reading anything about Asia-related events in the previous year, natural disasters (79 percent) and North Korea (72 percent) were the topics most commonly selected by respondents. News about “Chinese political influence”, a term used to describe political interference by the People’s Republic of China, was recalled by half of those surveyed.

Figure 25

Do you remember hearing anything in the news about these issues?



Source: Q28 - Can you recall hearing or reading anything in the news about the following issues?

Base: New Zealanders seen/heard Asia-related information past 3 months (n=850)

Age and ethnicity affect what New Zealanders recall

There was a notable difference in what people recalled depending on their individual traits. The main differences in news recall are driven by ethnicity and age, specifically Asian-ethnicity New Zealanders compared to non-Asian New Zealanders and young New Zealanders compared to 30 years and over.

Asian New Zealanders were more likely to recall:

- Elections or political events in Asia - 47 percent compared to 36 percent for non-Asian New Zealanders.
- Pop culture in Asia (including movies, music, celebrities) - 41 percent compared to 29 percent for non-Asian New Zealanders.
- The Asia New Zealand Foundation - 14 percent compared to six percent for non-Asian New Zealanders.

Non-Asian New Zealanders had higher recall for:

- Natural disasters in Asia - 82 percent compared to 66 percent for Asian New Zealanders.
- North Korea - 75 percent compared to 56 percent for Asian New Zealanders.

New Zealanders aged 30 years and over recalled the following topics:

- Natural disasters in Asia - 83 percent compared to 63 percent for under 30-year-olds.
- "Chinese influence" - 56 percent compared to 31 percent for under 30-year-olds
- South China Sea - 40 percent compared to 18 percent for under 30-year-olds.
- Rohingya refugees - 40 percent compared to 12 percent for under 30-year-olds.

Under 30-year-olds recalled:

- Pop culture in Asia (including movies, music, celebrities) - 39 percent compared to 29 percent for people aged 30 years and over.



How do New Zealanders perceive different countries?

This section looks at how New Zealanders perceive some countries in Asia relative to others. Who do we regard as friends and who do we see as threats? We also explore whether projects such as China's Belt and Road Initiative and the 2019 Rugby World Cup in Japan are shaping New Zealanders' views of those specific countries.



Key findings



Most countries are viewed as friendly towards New Zealand with only North Korea and Russia viewed as a threat by more than half of New Zealanders.

The perceived friendliness of India has declined by eight percentage points between 2017 and 2018; and China's perceived friendliness has declined by 13 percentage points.

Russia, China, North Korea and the United States of America have risen as perceived threats since 2017.

North Korea remains the biggest perceived threat to New Zealand, but we have also witnessed increased threat perceptions of Russia, China and the United States.

Awareness of China's Belt and Road Initiative continues to rise with most people neutral or positive about it.

Awareness of the initiative has risen to 44 percent up eight percentage points in a year.

Japan hosting the 2019 Rugby World Cup and 2020 Olympics is affecting New Zealanders' awareness of Japan and its culture.

Interest is expected to continue to build as the two events get closer. Travel to Japan and learning about Japan's arts and culture (including indigenous culture) are aspects New Zealanders are interested in learning more about. For younger New Zealanders, there is interest in Japanese language as well as work and study opportunities.

Friends and foes

Most countries are perceived to be friendly towards New Zealand

New Zealanders continue to think most countries are friendly towards New Zealand with the 'friendliest' countries perceived to be Australia and the United Kingdom (see Figures 26 and 27).

Some countries are perceived to be less friendly towards New Zealand than they were a year ago. India and Russia have dropped eight percentage points between 2017 and 2018, while China has dropped 13 percentage points.

North Korea, Russia and China top the list as perceived threats

Nearly a third of New Zealanders (31 percent) view North Korea as our biggest threat, though this is down from 56 percent in 2017.

China follows behind, rated as New Zealand's biggest threat by 17 percent of New Zealanders. The United States sits at 13 percent. Russia is increasingly seen as an unfriendly country, with 12 percent naming Russia as our biggest threat, up from just two percent in 2017.

Perceived threat levels are strongly affected by a person's age and ethnicity. New Zealand Europeans and those aged 50 years and older are, for example, more likely to rate North Korea and Russia as a threat, compared to the rest of New Zealand:

Those who perceive North Korea as a threat:

- 68 percent of New Zealand Europeans
 - 49 percent of non-European New Zealanders
-
- 70 percent of those aged 50 years and older
 - 57 percent of those under 50

Those who perceive Russia as a threat:

- 55 percent New Zealand European
 - 39 percent non-European New Zealanders
-
- 59 percent of those aged 50 years and older
 - 44 percent of those under 50

Those who perceive China as a threat:

- 34 percent New Zealand European
 - 28 percent non-European New Zealanders
-
- 30 percent of those aged 50 years and older
 - 36 percent of those under 50

New Zealanders aged 50 and over also see Indonesia as more of a threat (20 percent) than under 50-year-olds (eight percent). South Korea is seen as a threat by under 30-year-olds (18 percent) more than over 30-year-olds (10 percent).

Figure 26

Which of these countries do you think is **friendly** towards New Zealand? (2017 and 2018)

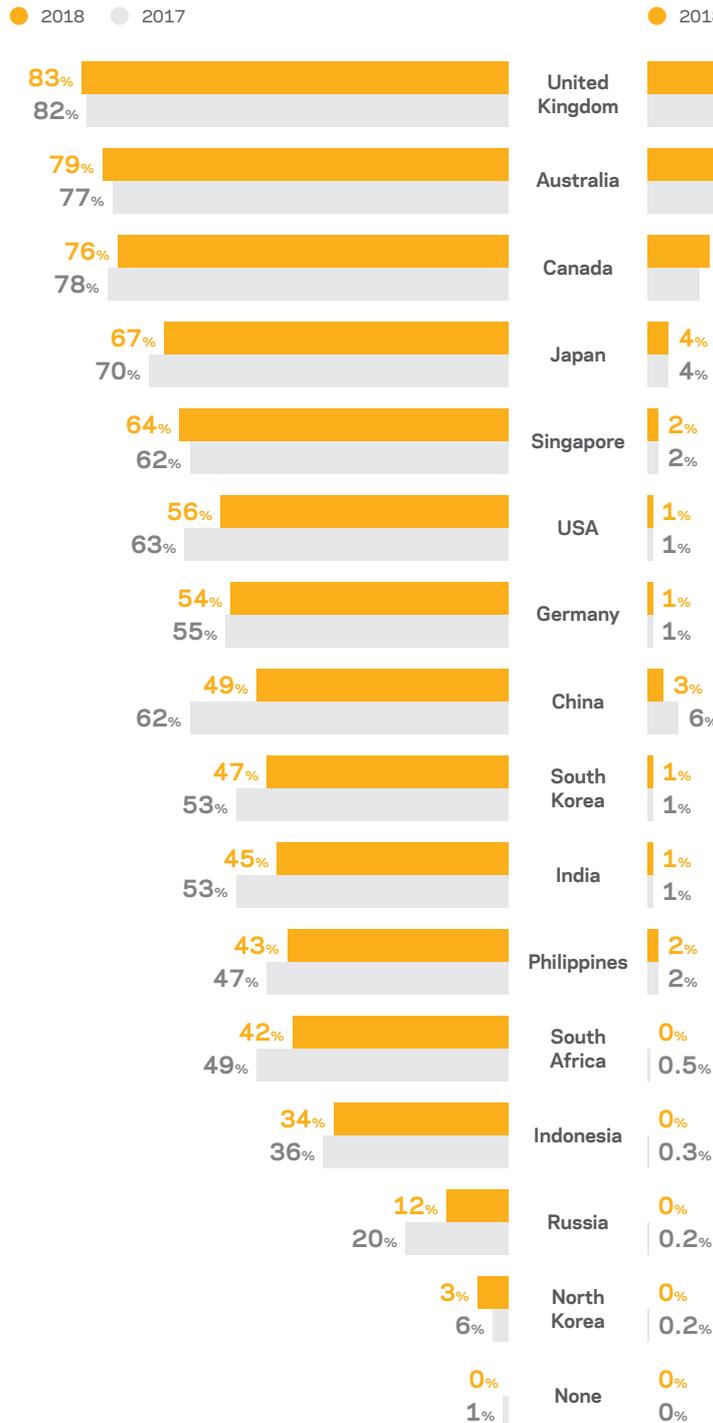
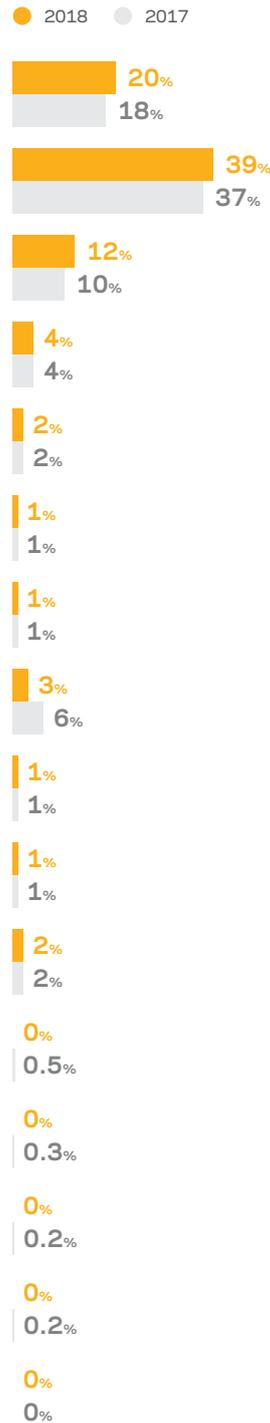


Figure 27

Which of these countries do you think is the **friendliest** towards New Zealand? (2017 and 2018)



Source: Q3a - Which of the following countries do you think is friendly towards New Zealand? That is, you view them as safe and trustworthy. Q3b - And which do you think is the friendliest?

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

Figure 28

Which countries do you think pose a **threat** towards New Zealand? (2017 and 2018)

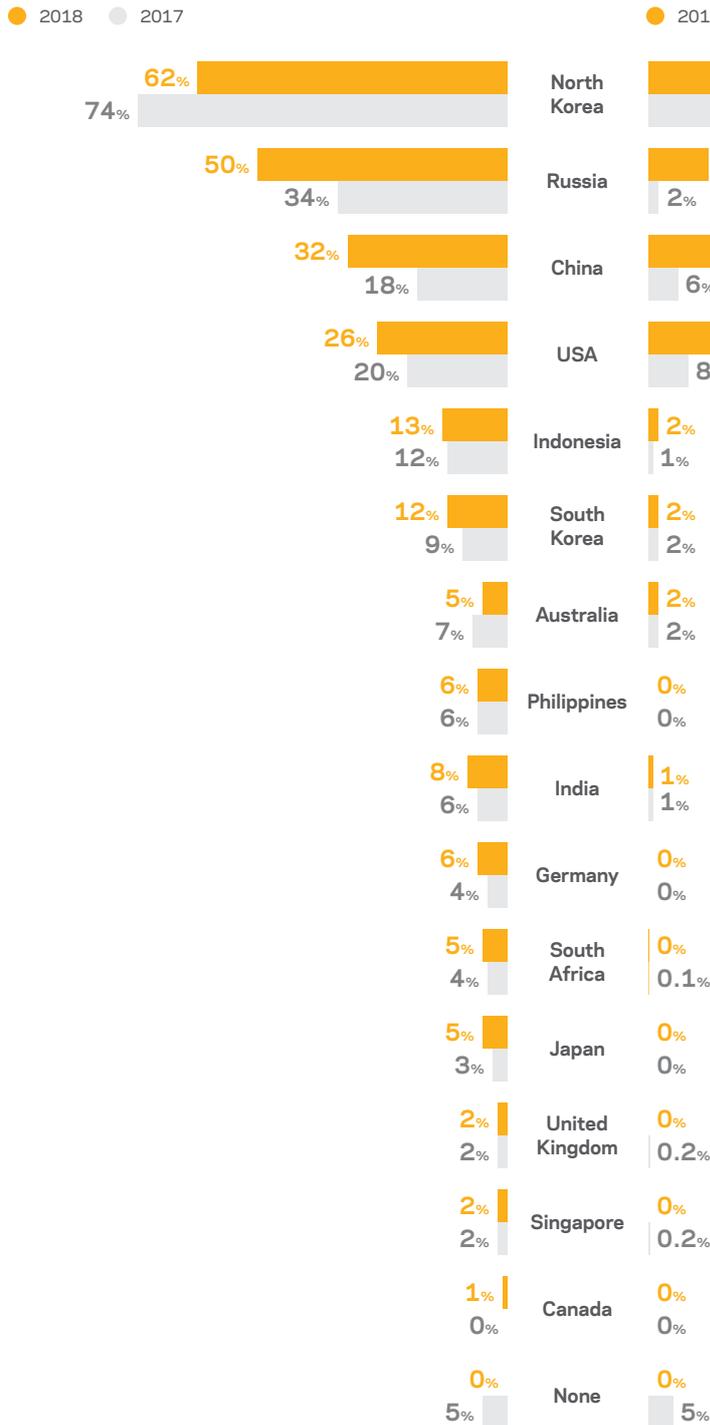
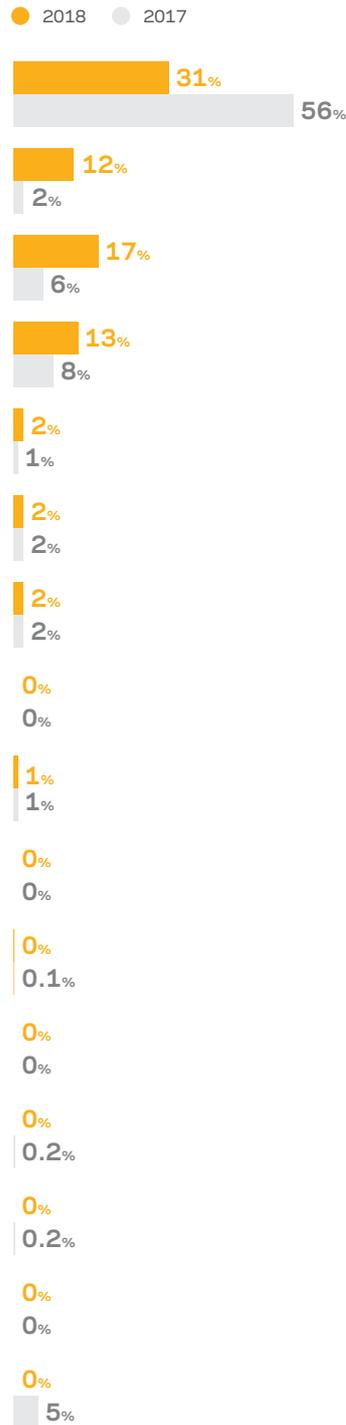


Figure 29

And which country do you think poses the **biggest threat** to New Zealand? (2017 and 2018)



Source: Q3c - Which of the following countries do you think is a threat towards New Zealand? That is, you view them with caution and suspicion. Q3d - And which do you think is the biggest threat?

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

China's Belt and Road Initiative

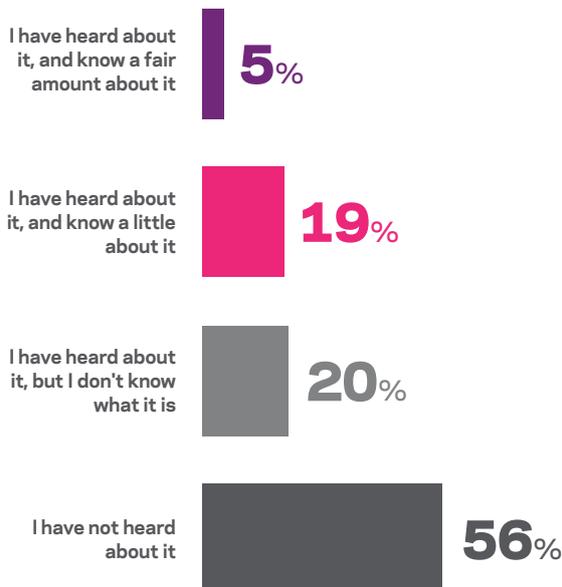
One in four New Zealanders understand the basics of the Belt and Road Initiative

Awareness of China's Belt and Road Initiative has jumped eight points between 2017 and 2018 to 44 percent (see Figure 30). Only five percent of New Zealanders know 'a fair amount' about it and 19 percent know 'a little bit' about it.

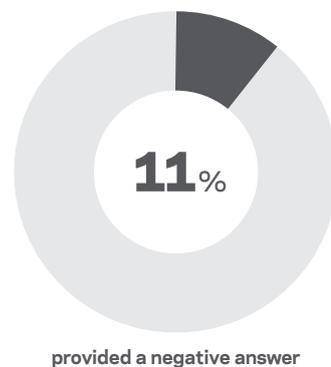
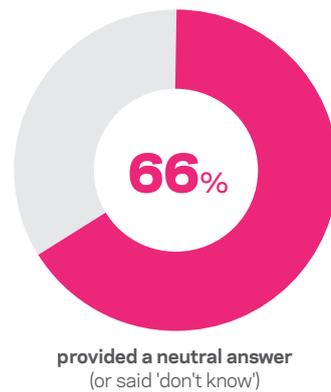
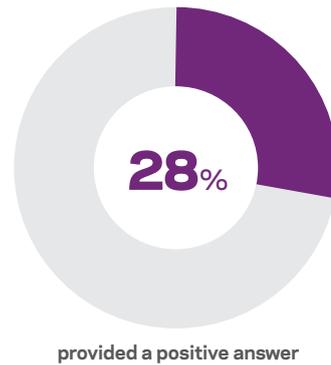
People with higher awareness of the Belt and Road Initiative include over 30-year-olds (47 percent compared to 34 percent for under 30-year-olds) and New Zealanders of Asian ethnicity (56 percent compared to 43 percent for non-Asian New Zealanders).

Figure 30

How much do you feel you know about the Belt and Road Initiative?



Sentiment towards the Belt and Road Initiative



Source: Q5a - 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?

Note: Respondents were able to give more than one answer, so the figure tallies to more than 100 percent.

Base: All New Zealanders (n=2,001) | Sentiment those who have heard of Belt and Road (n=509)

Sentiment towards the Belt and Road Initiative is largely neutral to positive

Sentiment towards the Belt and Road Initiative remains largely unchanged compared to last year. Two out of three (66 percent) New Zealanders have a neutral opinion of the initiative, with 28 percent having a positive opinion. Eleven percent (down three points) have a negative view of the initiative.

Most New Zealanders connect the Belt and Road Initiative with trade and infrastructure

Of those who know at least 'a little bit' about the Belt and Road Initiative, almost three in four describe it primarily as a trade and infrastructure initiative. Forty-four percent of New Zealanders describe it as a Chinese-led initiative. Figure 31 shows the breakdown in more detail.

Figure 31

Can you describe what you know about the Belt and Road Initiative?



Source: Q5b - Can you briefly describe what you know about the Belt and Road Initiative?

Base: All those who have heard of Belt and Road (n=509)

Notes: Based on coding from an open-ended question; People often provided more than one single description in their answer.

Japan in the sports spotlight

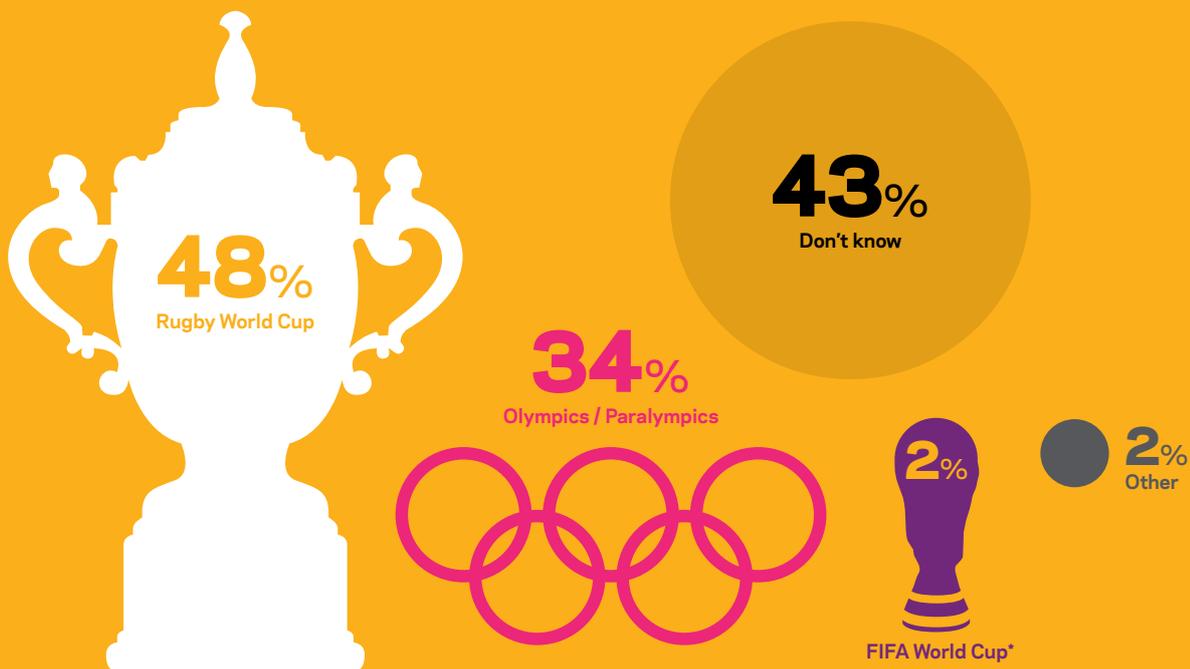
More New Zealanders are aware Japan is hosting the 2019 Rugby World Cup compared to those who know it is hosting the 2020 Olympics.

Forty-eight percent of New Zealanders are aware that the Rugby World Cup is being hosted by Japan this year. Awareness is lower for younger New Zealanders (under 30 years) and New Zealanders of Asian ethnicity.

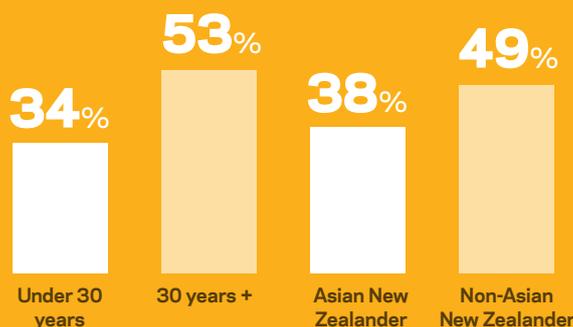
One in three (34 percent) New Zealanders, across all age groups, genders and demographics, are aware that Japan is hosting the 2020 Olympics.

Figure 32

Japan is hosting two major sporting events in the next two years - what are they?



Those who named the Rugby World Cup



Source: Q24a - Japan is hosting two international sporting events in 2019 and 2020. Do you know what events they are?

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

* Note: FIFA World Cup is a wrong answer

New Zealanders are open to learning about Japan

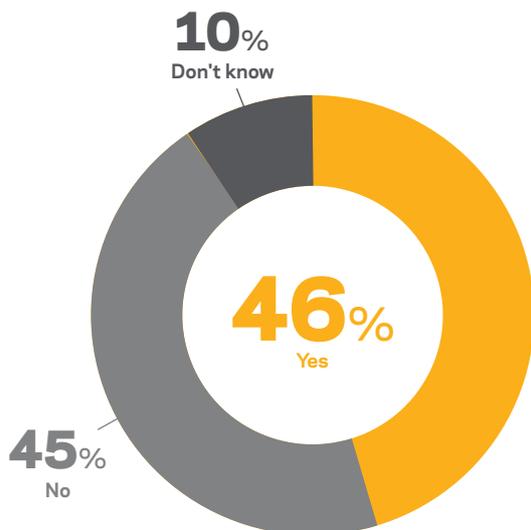
Almost half of New Zealanders, when prompted about the Rugby World Cup and Olympics being hosted in Japan, said the events would spark their interest in Japan.

Different demographic groups expressed greater interest than the wider group in learning about Japan in the context of these major sporting events. Specifically, Asian and Pacific New Zealanders, as well as younger New Zealanders, are more likely to want to learn about Japan compared to other New Zealanders (46 percent):

- Asian New Zealanders: 65 percent
- Pacific New Zealanders: 65 percent
- New Zealanders aged 20 to 39 years old: 57 percent

Figure 33

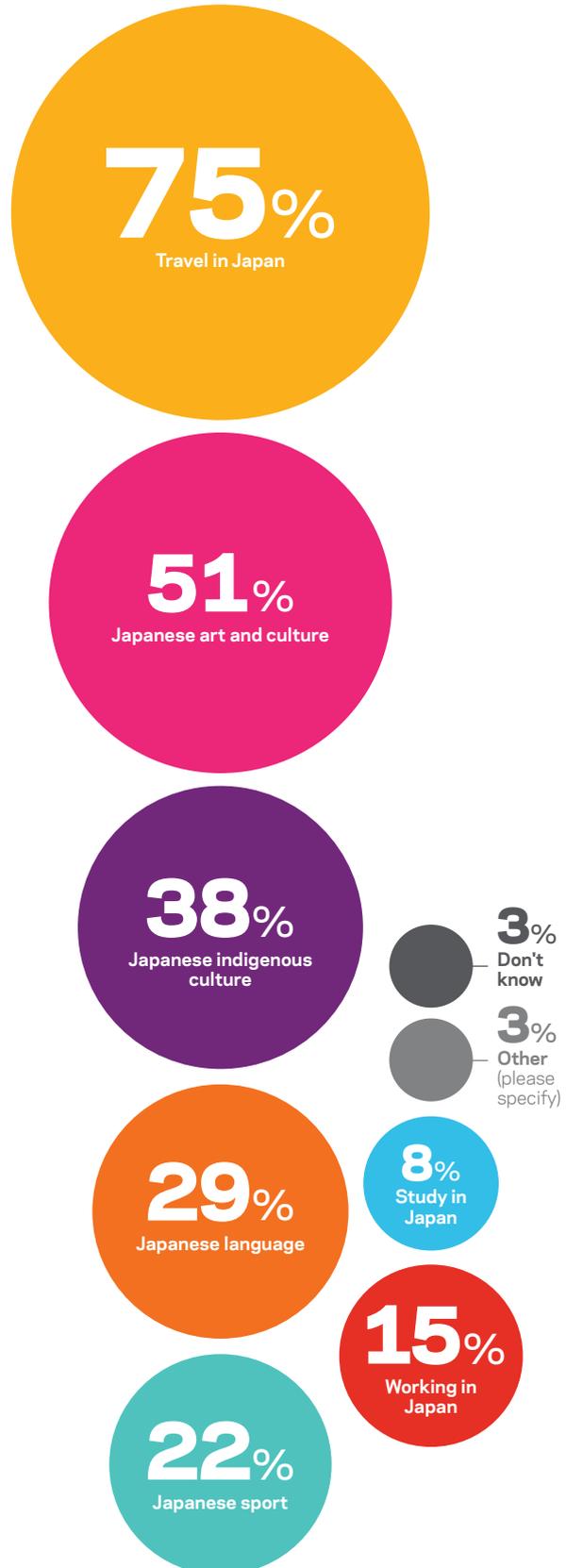
Do you think you'll be more interested in Japan because of these events?



Source: Q24b - Do you expect these events to increase your interest in learning more about Japan? Q24c - Which of these do you think you would like to know more about Japan as a result of these events?

Base: All New Zealanders (n=2,001) / All who are interesting in learning more (n=957)

What would you like to know more about?



New Zealanders' interest in Japan is likely to expand beyond the two sporting events.

Twenty-two percent of New Zealanders said they were interested in learning more about sport in Japan, 75 percent said they were interested in further travel to Japan, and 51 percent said they were interested in Japan's art and culture.

Thirty-eight percent said they were interested in Japan's indigenous culture and 29 percent in the Japanese language. Māori are more likely to be interested in learning about Japanese indigenous culture (52 percent) compared to non-Māori (36 percent).

Under 30-year-olds are particularly interested in:

- Japanese language (35 percent compared to 26 percent for over 30-year-olds).
- Japanese sport (30 percent compared to 18 percent for over 30-year-olds).
- Working in Japan (23 percent compared to 11 percent for over 30-year-olds).
- Studying in Japan (14 percent compared to 5 percent for over 30-year-olds).



What do New Zealanders think about hosting APEC in 2021?



This sections looks at New Zealanders' views of Asia-Pacific Economic Cooperation (APEC), which New Zealand will host in 2021.

Key findings



General awareness of APEC is high, though most New Zealanders have a low level of detailed understanding.

Four out of five New Zealanders have heard of APEC, with most able to explain the acronym and note that it is a trade summit (but are otherwise unable to describe what it does or how it functions).

Four out of five New Zealanders are not aware that New Zealand is hosting APEC in 2021.

Almost three in five support New Zealand hosting APEC due to the likelihood that it will raise New Zealand's profile internationally and will have a positive impact on the economy and on tourism to New Zealand.

Only four percent of New Zealanders oppose New Zealand hosting the summit.

Most New Zealanders know what APEC is, but not what it does

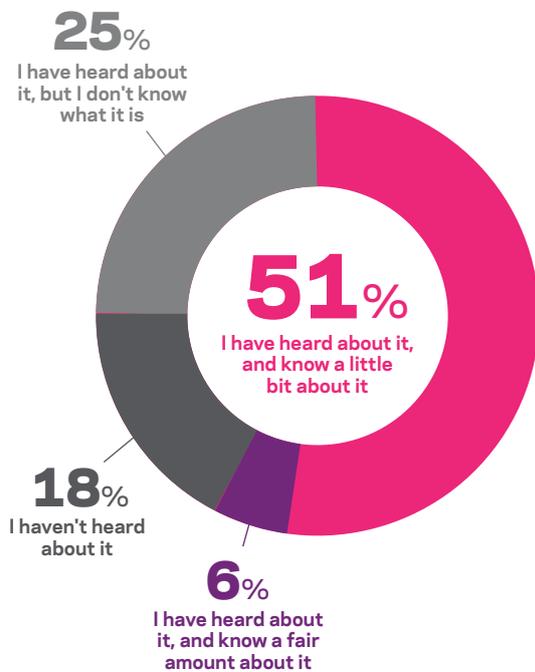
Eighty-two percent of those surveyed had heard of APEC, but most only knew a little bit about it (51 percent) with only six percent knowing a fair amount about it (see Figure 34).

Younger New Zealanders (under 30 years) are much less likely to be aware of APEC (49 percent) compared to over 30-year-olds (72 percent).

Although general awareness is high, very few New Zealanders had in-depth knowledge of APEC's work. Those who know 'a little bit' or 'a fair amount' about APEC can explain what the acronym stands for (23 percent), talk about it as a summit (29 percent) or recognise its role in trade between Asia-Pacific countries (23 percent).

Figure 34

Which of these best describes your knowledge of APEC?



What do you know about APEC?



Source: Q23a - Which of these best describes your knowledge of APEC? Q23b - Can you briefly describe what you know about APEC?

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

Base: All aware of APEC (n=1,155)

Four in five New Zealanders don't know New Zealand is hosting APEC in 2021

Younger New Zealanders (under 30 years) were less likely to be aware (14 percent) compared to those 30 years and over (22 percent). Asked about the benefits of hosting, most respondents (59 percent) were positive.

Most New Zealanders support New Zealand hosting APEC (59 percent), with the following groups having significantly different levels of support:

- 67 percent of New Zealanders of Asian ethnicity support New Zealand hosting APEC.
- 50 percent of Māori are supportive of New Zealand hosting APEC.
- 62 percent of those aged 30 years and older are supportive of New Zealand hosting, compared to 51 percent support from under 30-year-olds.

What is APEC?

APEC, which stands for Asia-Pacific Economic Co-operation, is a multilateral organisation that aims to support sustainable economic growth and prosperity in the Asia-Pacific region. New Zealand was a founding member of APEC when it began in 1989, with only 12 members.

Today, APEC has 21 Pacific Rim members, including 12 Asian members. World leaders get together once a year for an APEC Leaders' Week and that's all many people hear of it. But officials from APEC's member countries meet year-round to talk about economic goals and ways of working together. These range from forums on women and young people to technology and the global trading system.

Member economies take turns to host the talks annually, and these can see up to 22,000 delegates visit over the course of the year. In 2021, New Zealand will be hosting APEC.

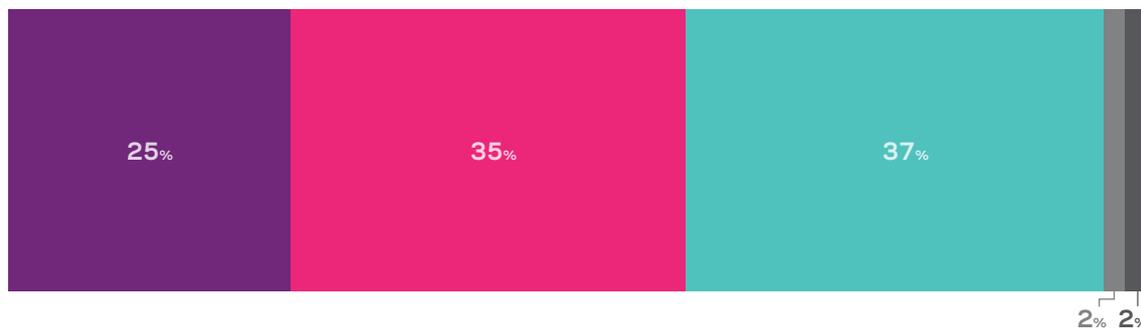
The pinnacle event, Leaders' Week, will be held in Auckland in November 2021.

More on this:

www.apec.org

Figure 35

How much do you agree or disagree that you support New Zealand hosting APEC?



- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree

Source: Q23c - Did you know New Zealand is hosting APEC in 2021?
Q23d - How much do you agree or disagree with the statement: I support New Zealand hosting APEC?

Base: All New Zealanders (n=2,001)
All excluding don't know (n=1,854)

The majority of New Zealanders feel the benefits of hosting APEC outweigh the costs

Respondents identified the benefits of APEC as raising New Zealand's international profile, boosting New Zealand's economy (jobs, exports, growth) and increased tourism. Of those who are not supportive of New Zealand hosting APEC, cost is the main reason given.

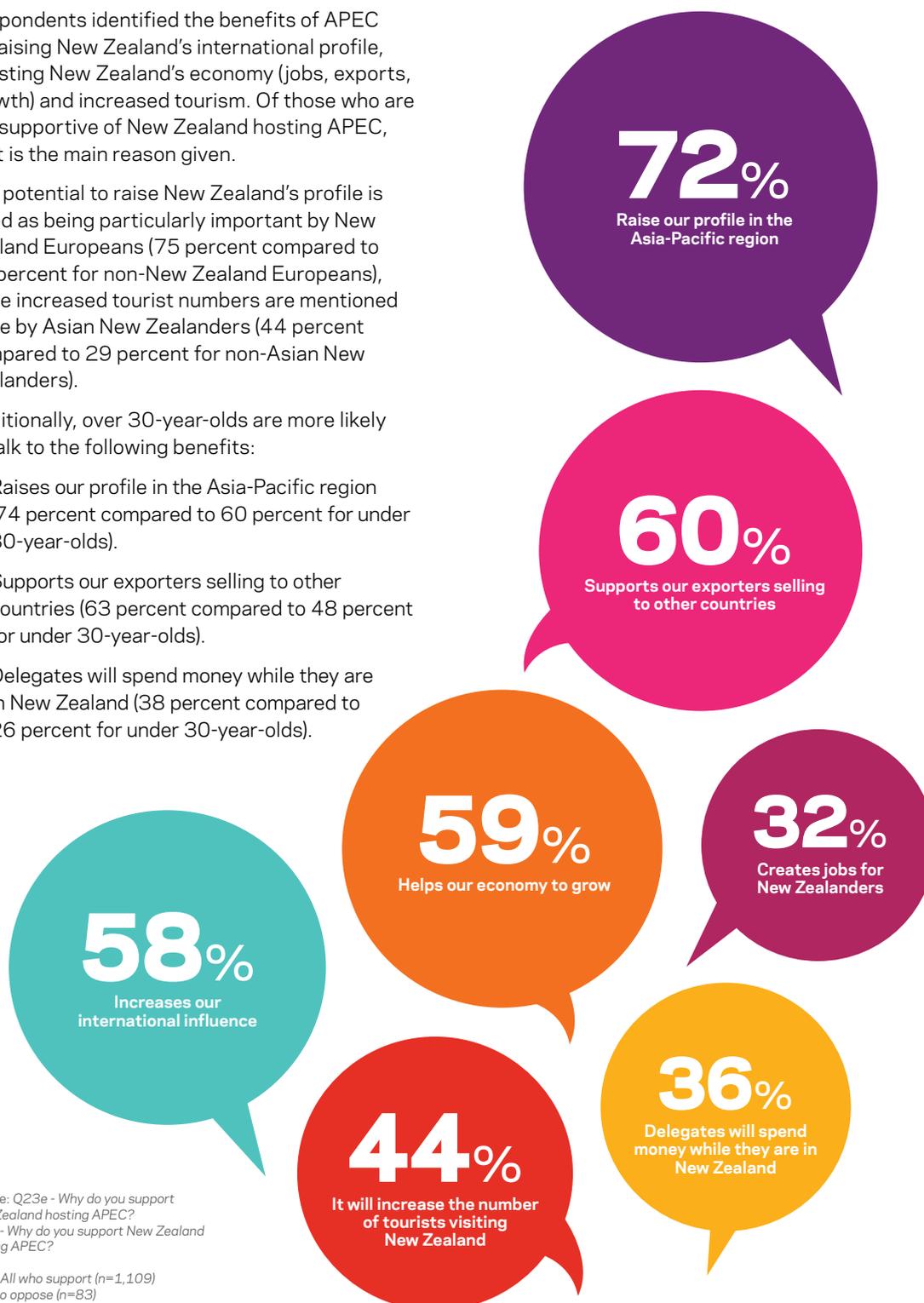
The potential to raise New Zealand's profile is rated as being particularly important by New Zealand Europeans (75 percent compared to 62 percent for non-New Zealand Europeans), while increased tourist numbers are mentioned more by Asian New Zealanders (44 percent compared to 29 percent for non-Asian New Zealanders).

Additionally, over 30-year-olds are more likely to talk to the following benefits:

- Raises our profile in the Asia-Pacific region (74 percent compared to 60 percent for under 30-year-olds).
- Supports our exporters selling to other countries (63 percent compared to 48 percent for under 30-year-olds).
- Delegates will spend money while they are in New Zealand (38 percent compared to 26 percent for under 30-year-olds).

Figure 36

Why do you support New Zealand hosting APEC?



Source: Q23e - Why do you support New Zealand hosting APEC?
Q23f - Why do you support New Zealand hosting APEC?

Base: All who support (n=1,109)
All who oppose (n=83)

Note: Based on coding from an open-ended question; People often provided more than one single description in their answer.



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

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

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

- The perceived importance of Asia.
- Views about the benefits to New Zealand of a relationship with Asia.
- Perceptions of Asian peoples and cultures.
- Perceived knowledge of Asia.
- Perceptions of friendliness and threat.
- Media perceptions and consumption.
- Perceived involvement with Asian people and cultures.
- Interactions with people who identify as Asian.
- Asia-related interests, including travel and attending relevant events.
- Current affairs and events.

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

Quantitative methodology

Two thousand and one online surveys were completed with New Zealanders aged 15 years and over from 18 October – 8 November 2018. A survey of 2,001 people has a maximum margin of error of +/- 2.2 percentage points at the 95 percent confidence level.

Data collection method

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

Sampling and weighting

Respondents were drawn from Colmar Brunton's online research panel – which contains more than 100,000 New Zealanders, recruited from both offline and online sources (including through their random telephone surveys, social media, advertising and the Fly Buys loyalty programme). Their panel meets or exceeds all 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, location and household size. Final survey weighting ensured overall results represent the adult population on age, gender, and ethnicity. The weighted and unweighted sample profiles can be found in Appendix A.

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 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.
- Some survey results tally to more than 100 percent - this reflects the fact that people could give more than one answer in those questions.

Qualitative methodology

The qualitative phase of this project was conducted via four focus groups with 26 participants which explored key findings from the quantitative stage in more detail. Illustrative quotes from the focus groups are described throughout the report and provide the 'human context' behind the survey statistics. This year the focus was specifically on parents with children aged from 12 to 22 years of age.

Participants with a range of genders, child ages, ethnicities, household income and mindsets were identified from the quantitative survey and recruited via telephone. Mindset captured a parent's attitude to Asia regarding its impact on their children's future. They were either engaged, neutral or disengaged with Asia, each of these reflected how predisposed they were to Asia-capability.

The focus groups were conducted in:

- Auckland (Asia-engaged parent group)
- Whangarei (Asia-neutral parent group)
- Nelson (Asia-disengaged parent group)
- Christchurch (Asia-neutral parent group)

Segmenting the groups in this manner allowed Colmar Brunton to draw upon a wide spectrum of viewpoints and perspectives to understand Asia-capability. 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 groups were conducted face-to-face between 29 January and 12 February 2019, and each session lasted for two and a half hours.

Appendix A: Survey sample profiles

Gender and age

Gender	Unweighted percent (n=2,001)	Weighted percent (n=2,001)
Male	47	48
Female	53	52
Gender diverse	<1	<1
Age	Unweighted percent (n=2,001)	Weighted percent (n=2,001)
Under 30 years	24	25
30-39 years	16	15
40-49 years	18	20
50-59 years	17	16
60-69 years	13	12
70+	12	13

Ethnic identification

	Unweighted percent (n=2,001)	Weighted percent (n=2,001)
New Zealand European	62	73
New Zealand Māori	14	12
Pacific	6	6
Asian	23	12
Other	3	4

Location

	Unweighted percent (n=2,001)	Weighted percent (n=2,001)
Northland	4	3
Auckland	33	33
Waikato	9	9
Bay of Plenty	6	6
Gisborne	1	1
Hawke's Bay	4	3
Taranaki	3	2
Manawatu-Whanganui	5	5
Wellington	11	11
Tasman	1	1
Nelson	1	1
Marlborough	1	1
West Coast	1	1
Canterbury	13	13
Otago	5	5
Southland	2	2

Appendix B: Qualitative forum profile

Gender		Ethnic identification (some chose more than one)	
Female	9	New Zealand European	15
Male	19	New Zealand Māori	6
Total	28	Pacific	4
		Asian	2
		Other (inc other European and Pacific)	1
		Total	28
Age		Asia engagement	
30-39	4	Engaged	7
40-49	11	Neutral	14
50-59	13	Disengaged	7
Total	28	Total	28

About the Asia New Zealand Foundation Te Whītau Tūhono

The Asia New Zealand Foundation Te Whītau Tūhono is New Zealand's leading non-partisan, non-profit authority on Asia.

We were set up in 1994 to build New Zealanders' knowledge and understanding of Asia. We rely on a mix of public, philanthropic and corporate funding.

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.

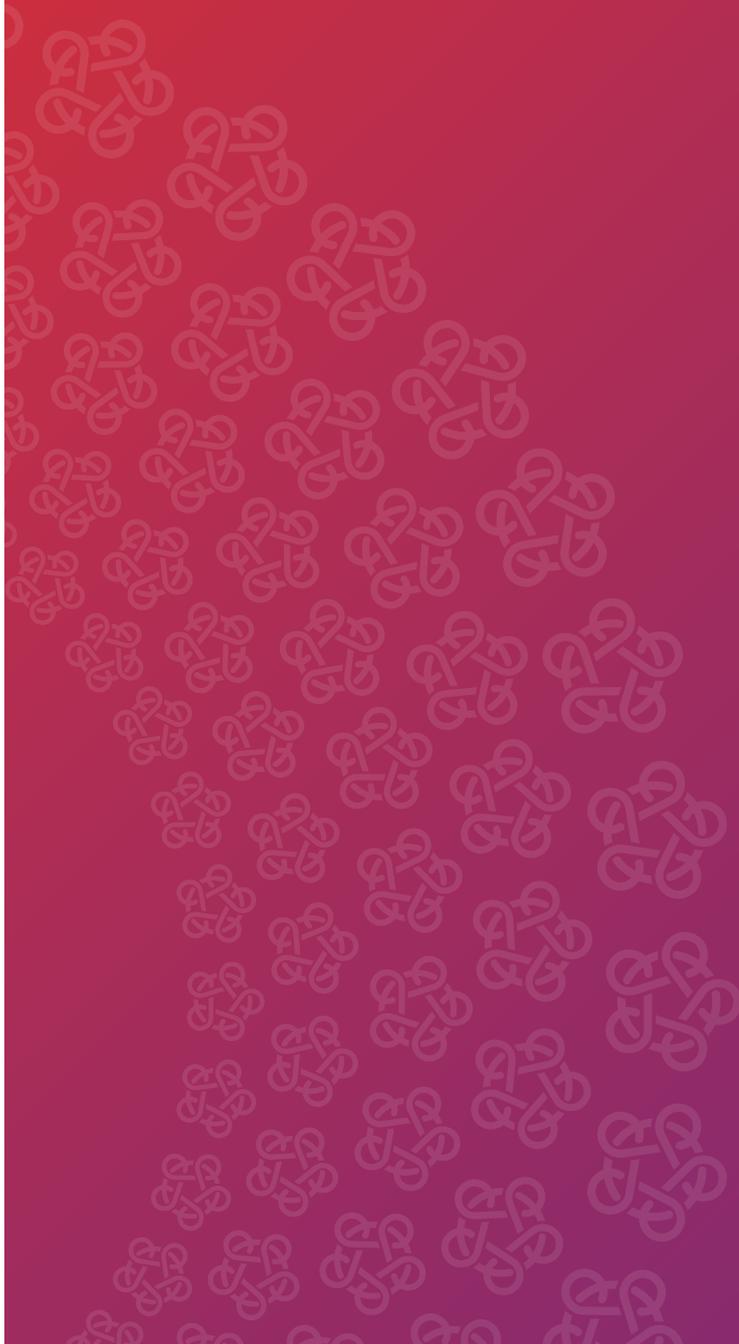
Our activities cover more than 20 countries in Asia and are delivered through programmes with a focus on arts, leadership, entrepreneurship, sports, media, education, research and informal diplomacy (Track II).

To find out more:

Website asianz.org.nz

Email asianz@asianz.org.nz

Phone +64 4 471 2320



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