

PERCEPTIONS OF ASIA

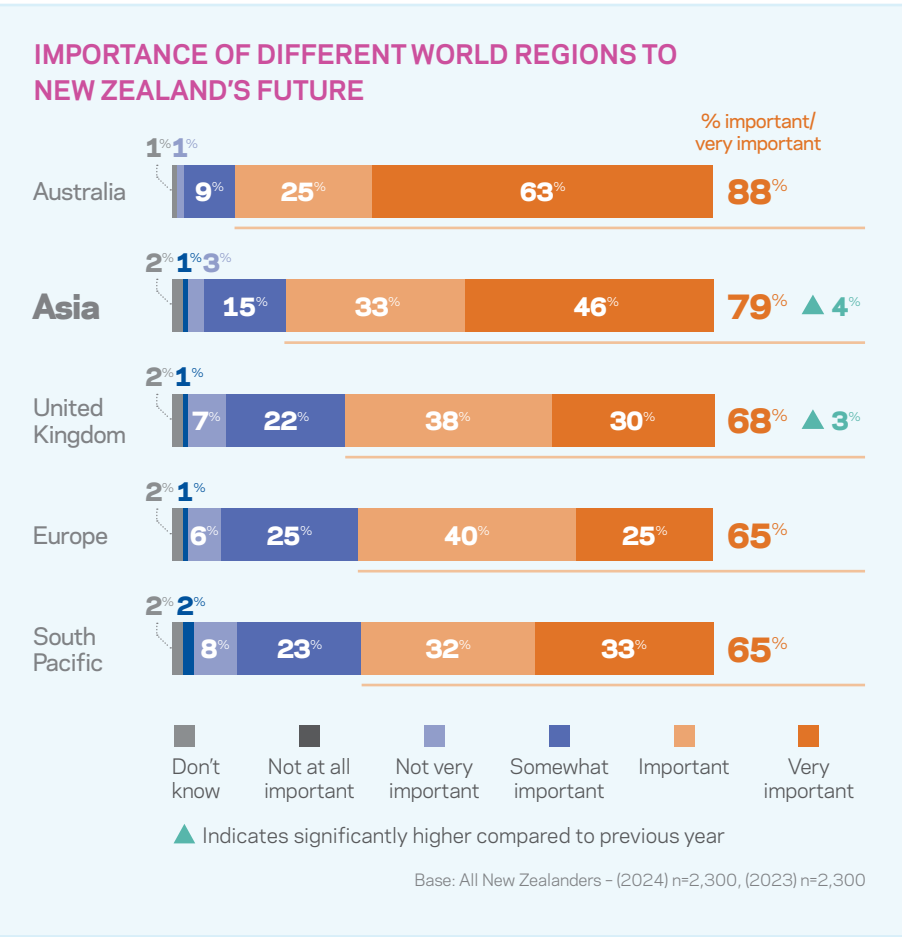
OVERVIEW

Released June 2025

The New Zealanders' *Perceptions of Asia and Asian Peoples* annual survey is New Zealand's longest running and most comprehensive dataset measuring New Zealanders' views, knowledge and understandings of Asia and New Zealand's place within it. Here are some of the key findings from our latest survey released in June 2025.

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

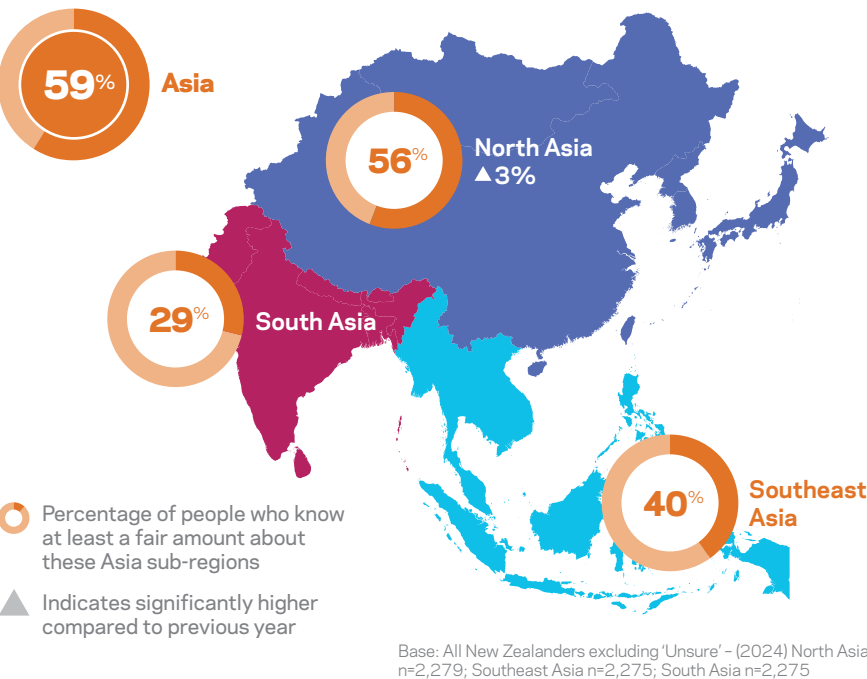
New Zealanders see Asia as second only to Australia in terms of its importance to New Zealand's future. Within Asia, New Zealanders view North Asia as most important to New Zealand's future. China and Japan are seen as the two most important countries, followed by India, Singapore and South Korea.



How much do New Zealanders know about Asia?

New Zealanders' knowledge of Asia continues to be at an all-time high. Of Asia's sub-regions, New Zealanders are most familiar with North Asia.

NEW ZEALANDERS' KNOWLEDGE OF ASIA'S SUB-REGIONS



Daily connections and confidence

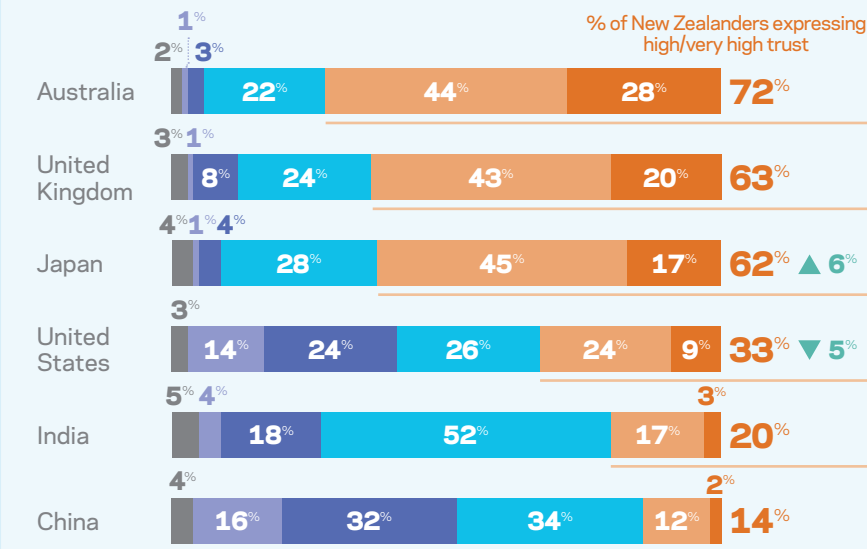
Over half of New Zealanders feel connected with Asian cultures in their daily lives, and a third consume Asia-related entertainment at least monthly. Three quarters (76 percent) of New Zealanders feel at least fairly confident engaging with people of Asian cultures.

Trust in key powers

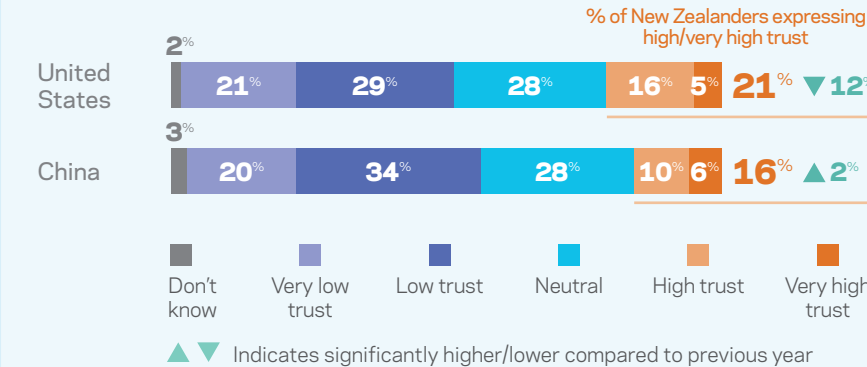
Japan continues to be New Zealanders' most trusted power in Asia, with trust in Japan now equal to trust in the United Kingdom. Australia is the only other country - besides New Zealand - that enjoys higher trust.

Trust in the United States is declining, while trust in China is becoming more polarised.

LEVELS OF TRUST IN MAJOR POWERS TO ACT RESPONSIBLY IN THE WORLD



2025 MINI-POLL RESULTS



PERCEPTIONS OF ASIA

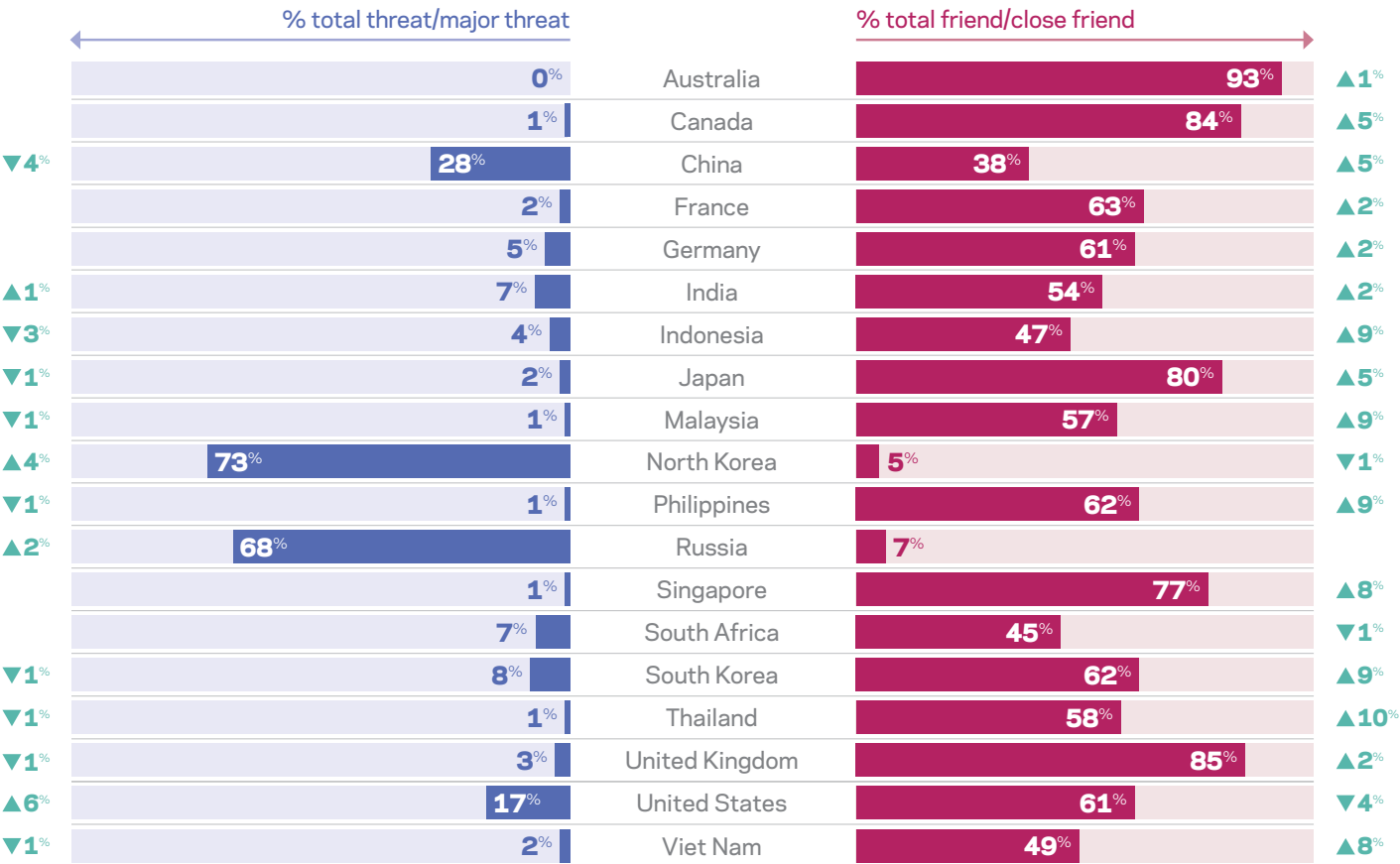
OVERVIEW

Friend or threat?

Japan, Singapore, the Philippines and South Korea are considered New Zealand's closest friends in Asia. New Zealanders are feeling increasingly warm towards Southeast Asian countries, with all seeing a significant jump in friend perceptions from previous surveys.

New Zealanders view North Korea and Russia as the biggest threat, consistent with the last survey. New Zealanders' views of China and the United States have changed significantly between November 2024 and March 2025 following developments in both countries' foreign policies.

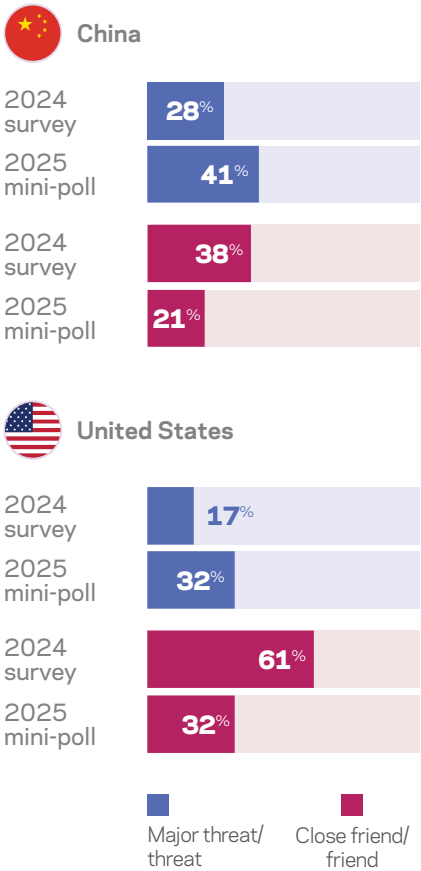
FRIEND AND THREAT PERCEPTIONS



▲ ▼ Indicates significantly higher/lower compared to previous year

Base: All New Zealanders - (2024) n=2,300

MARCH MINI-POLL



■ Major threat/threat
■ Close friend/friend

Base: All New Zealanders - (2025) n= 1,000

What are the biggest threats to New Zealand's vital interests?

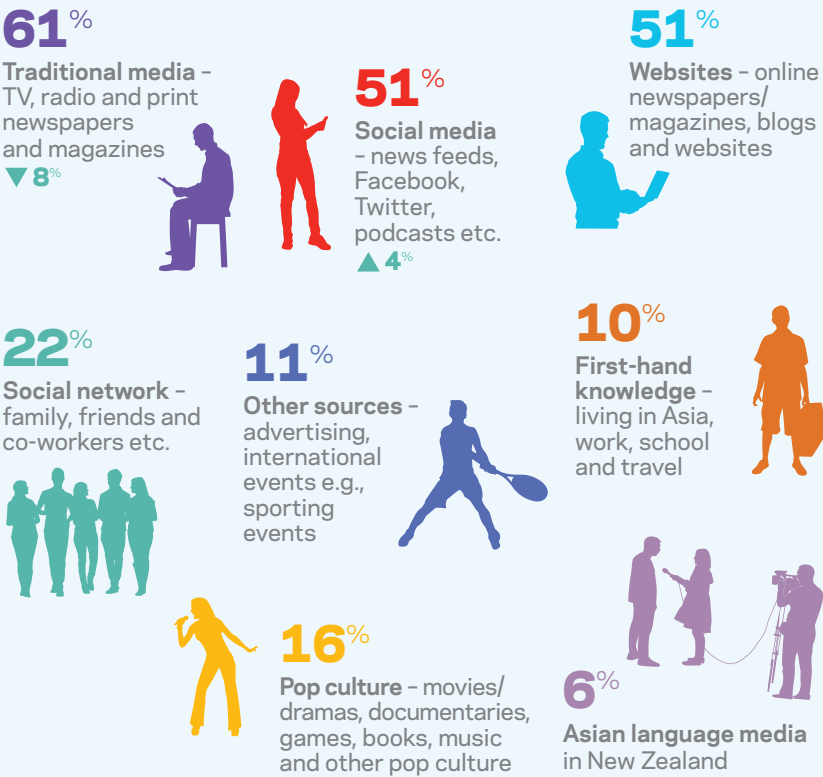
Fake news and misinformation is the only issue to be considered a major concern by at least half of all New Zealanders (up seven percentage points from last year). Just under half of New Zealanders (47 percent) are highly concerned about climate change and cyber-attacks from other countries.

Media

Over a third (37 percent) of New Zealanders can recall seeing or hearing Asia-related news in the recent months, compared to over 60 percent 10 years ago.

While traditional media remains New Zealanders' top news source for Asia news, it continues to decline in favour of social media.

WHERE DO NEW ZEALANDERS GET THEIR ASIA NEWS FROM?



▲ ▼ Indicates significantly higher/lower compared to previous year

Base: New Zealanders who have seen/heard Asia-related media in the last three months - (2024) n=854, (2023) n=953

Trade interests dominate

Most New Zealanders continue to see trade and business as the backbone of our engagement with Asia. They are recognising that the fast-growing economies and populations of countries in Asia (notably Southeast Asia and India) offer New Zealand real opportunity - not only as markets for our exports, but also because of their technology and innovation.

Defence and security

A third of New Zealanders are highly concerned about military conflict between major powers happening in the Asia region but are divided on where military conflict is most likely to occur. New Zealanders are similarly divided on national defence spending, the impact of AUKUS (the security partnership between the United States, Australia and the United Kingdom) on regional safety.

Japan, Singapore and South Korea are considered New Zealand's closest defence and security partners in the region.