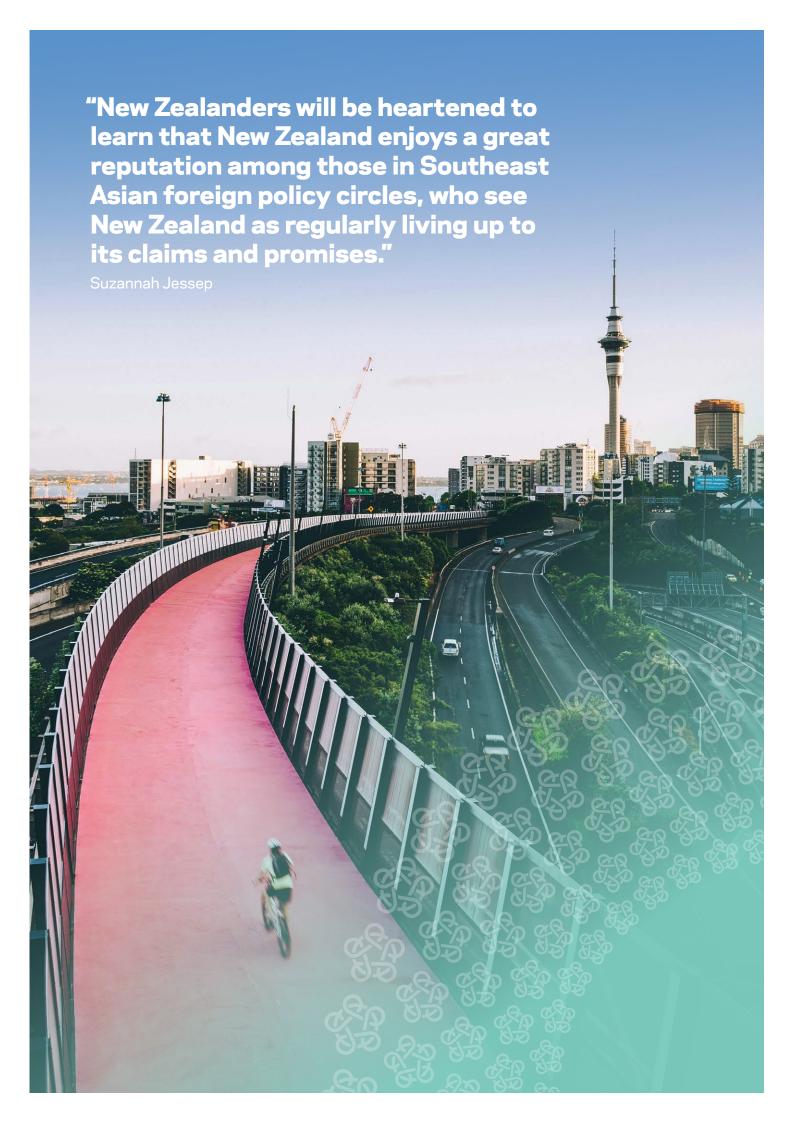


# PERCEPTIONS OF NEW ZEALAND





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#### Comment from the Chief Executive

Through 28 years of surveying
New Zealanders' perceptions of Asia,
we have traced New Zealand's evolving
views of a region that itself has undergone
rapid growth and transformation.
We know that New Zealanders feel
increasingly connected to the region
through family, friends and personal ties,
they are consuming more entertainment
and news from Asia than ever before, and
they have a clearer sense of the region's
challenges and opportunities.

In the course of producing the *Perceptions of* Asia survey, we have often been asked when we will undertake the inverse – to look at how New Zealand and its role in the region is viewed from within Asia itself. Does our understanding of our own actions, behaviours, and intentions match up with perceptions of New Zealand by our partners in the region?

In order to find out, the Foundation commissioned a survey of 200 experts with working knowledge of New Zealand and its foreign policy across Singapore, Indonesia, the Philippines and Malaysia. Though a small sample, it gives us a sense of how New Zealand is seen within foreign policy communities in these countries.

The findings shed valuable insight into New Zealand's reputation overseas, how New Zealand is covered in local Southeast Asian media, what those in the region see as driving and shaping New Zealand's foreign policy decisions, what issues our Southeast Asian neighbours would like to see New Zealand take a stronger stance on, and what areas would most benefit from closer cooperation.



New Zealanders will be heartened to learn that New Zealand enjoys a great reputation among those in Southeast Asian foreign policy circles, who see New Zealand as regularly living up to its claims and promises. There is demand, however, for New Zealand to take a stronger stance on global issues such as climate change that New Zealand is seen as uniquely placed to advocate for given its cinematic natural environment and rich biodiversity.

This report is something we have wanted to do for a long time, and it is encouraging that there is a growing appetite and demand for these insights. It reflects an understanding that to keep deepening and broadening our connections in Asia – which are only becoming more crucial to our future – we must understand not only how New Zealanders see the region, but how New Zealand and its actions are perceived.

I hope you enjoy reading the report and find the results as encouraging and interesting as I do.

#### Suzannah Jessep

Chief Executive Asia New Zealand Foundation Te Whītau Tūhono

#### Introduction

Since 1997, the Asia New Zealand Foundation Te Whītau Tūhono has surveyed New Zealanders' perceptions of Asia, including New Zealand's relationships with the countries and peoples in the region.

For the first time, the Foundation has sought to undertake the reverse and turn the mirror back on ourselves. In this pilot study, we seek to understand how experts in four Southeast Asian countries – Indonesia, Malaysia, the Philippines and Singapore – view New Zealand and its role in the region.

Beyond New Zealand's clean green image, rugby and Lord of the Rings, how do those in Southeast Asia with working knowledge of New Zealand and New Zealand's foreign policy perceive New Zealand? Who do our Southeast Asian neighbours see as New Zealand's closest friends in Asia? What issues should New Zealand take a stronger stance on, and what are the biggest opportunities for strengthening relations and cooperation?

This survey reveals a largely positive and encouraging picture.

New Zealand is seen as a trusted country that acts responsibly in the world, consistently lives up to its claims and promises, and is generally seen to be upholding its "independent foreign policy". Respondents across Malaysia, Indonesia and the Philippines see New Zealand's foreign policy as primarily driven by its principles and values, while Singaporean respondents believe it is driven by a desire to maintain relationships with traditional security partners.

New Zealand is generally seen as a like-minded country, particularly when it comes to trade and economic interests, as well as strategic security concerns. New Zealand is seen as less like-minded when it comes to political and governance ideals.

While a vast majority of respondents from all four countries see New Zealand as a friend or close friend to their respective countries, respondents have mixed views about who New Zealand's closest friends are in Asia – Japan, Singapore, China and Indonesia were all frequently mentioned for different reasons.

Given the focus on trade in New Zealand's foreign policy, it is interesting to see that respondents think New Zealand could increase its emphasis on trade within its broader bilateral relationships. Only a fraction of respondents felt New Zealand was too trade focused, even as local media coverage of New Zealand tends to be dominated by business and trade stories.

New Zealand's standout characteristic is unsurprisingly its natural environment. Also in keeping with expectations is New Zealand's reputation as a strong producer of agricultural products, food and wine, as well as being a relatively safe and peaceful country.

Climate change is both the issue respondents most want New Zealand to take a stronger stance on, and the global challenge they believe New Zealand should be most worried about. Respondents pointed out that as a benefactor of a rich and diverse natural environment, New Zealand is well positioned – and incentivised – to be a global leader in this area. A majority of respondents noted that climate change and natural disaster response is the most important defence and security issue for increased bilateral cooperation.

At the same time, respondents also recognise the impact of New Zealand's existing activity in the region. New Zealand's current aid and development programmes are seen as having the biggest impact in the area of climate change, as well as education and promoting civil society and good governance. Indonesian respondents pointed out the impact New Zealand development initiatives have in the country's energy sector, while Singaporean respondents emphasised meaningful agriculture cooperation.

#### **Key findings**

#### Overall, the key messages are clear:

- New Zealand enjoys an excellent reputation among those in Southeast Asia with knowledge of New Zealand's foreign policy, who see New Zealand as generally upholding its "independent foreign policy" and as living up to its claims and promises.
- They view New Zealand's foreign policy decisions as being primarily driven by its principles and values, but also the desire to maintain relationships with traditional security partners.
- They see New Zealand as a friend or close friend and as generally like-minded, particularly on security and economic matters – less so on political and governance ideals.
- New Zealand's Southeast Asian neighbours want to see New Zealand take a stronger and louder stance on important global issues, namely climate change, and see New Zealand as well-positioned to do so. Climate change is identified as the issue New Zealand should be most worried about.

- New Zealand is seen as investing in the right areas, but there is obvious appetite for further trade and business opportunities.
- Similarly, New Zealand's existing aid and development activity is in the right areas, with education, climate change assistance, energy and civil society initiatives standing out for their impact. For this reason, there is clear demand to scale these up.
- When it comes to defence and security issues, New Zealand's Southeast Asian neighbours view security assistance and capability building as well as research and development as the most important areas for New Zealand to be engaging in.



#### Southeast Asian countries surveyed



#### Malaysia

Population **35,560,000** 

Capital city
Kuala Lumpur

Distance from NZ\* 8,703 km (approx)

#### **Philippines**

Population **115,800,000** 

Capital city Manila

Distance from NZ\* 8,025 km (approx)

#### Singapore

Population 6,000,000

Distance from NZ\* **8,408 km** (approx)

#### Indonesia

Population **285,500,000** 

Capital city Jakarta

Distance from NZ\* 7,719 km (approx)

#### **New Zealand**

Population 5,338,000

Capital city Wellington



# New Zealand's natural environment dominates first-word associations

Respondents across Southeast Asia are most likely to think of New Zealand's natural environment when they hear 'New Zealand', with around half of respondents in the four countries naming it as the first thing that comes to mind.

Agriculture, dairy, wine and cuisine were the next most frequently mentioned (14 percent), followed by New Zealand's liberal politics, tourism and being a destination for adventure activities (nine percent) New Zealand's culture, education system, sports and quality of life were also mentioned.

#### FIG. 1: FIRST THING THAT COMES TO MIND WHEN YOU HEAR 'NEW ZEALAND'

When you hear 'New Zealand,' what is the first word that comes to mind?

ALL BLACKS
SPORTS RUGBY CRICKET
PEACEFUL
LIBERAL POLITICS NATURE
DEMOCRATIC SAFE NATURE

ENVIRONMENTURE ACTIVITIES
HIGH QUALITY OF EDUCATION
CULTURE
PEOPLE
MOVIES

TRADE
FOCUSED

AGRICULTURE
LIVESTOCK HIGH QUALITY
OF LIFE

DAIRY WINE KIWI CUISINE

Base: All respondents, n=200

"A popular place for Filipino migrants seeking jobs and better quality of life."

Indonesia

# Nature and education are standout features for New Zealand's reputation

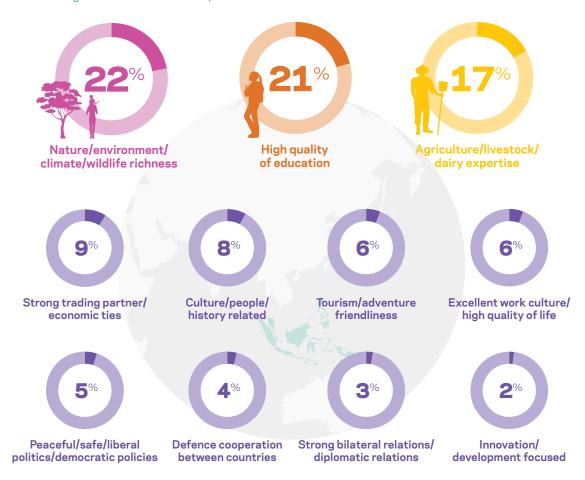
When asked what stands out about New Zealand's reputation in their country, respondents were most likely to point to New Zealand's natural environment and biodiversity (22 percent), followed closely by the high quality of New Zealand education (21 percent).

New Zealand's expertise in agriculture, livestock and dairy was third most frequently mentioned (17 percent), named by almost a quarter of both Singaporean and Malaysian respondents.

Indonesian and Filipino respondents were more likely to point to New Zealand's status as a strong trade partner than respondents from Singapore or Malaysia.

#### FIG. 2: WHAT STANDS OUT ABOUT NEW ZEALAND'S REPUTATION?

When thinking about New Zealand's reputation in \_\_\_\_\_ what stands out?



Base: All respondents, n=200

"Diplomatic and defence cooperation - the two countries established diplomatic relations in 1966 and have since cooperated in various fields."

# How is New Zealand covered in local media?

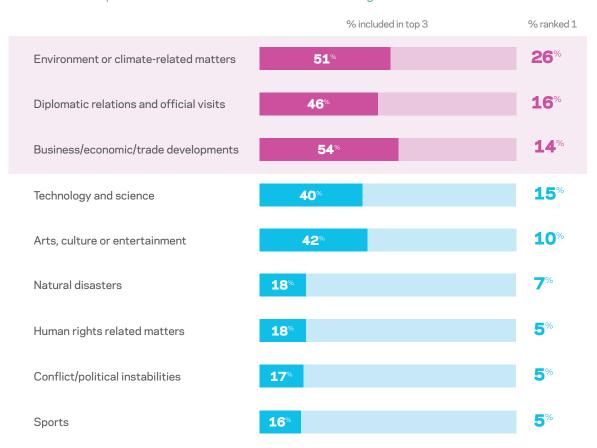
When asked to rank the top three themes that draw the most coverage of New Zealand in local media, respondents most frequently named business/ economic and trade developments, followed closely by environmental and climate-related matters, and diplomatic relations and official visits (although less so by Singaporean respondents) as their top three. Climate stories were most frequently ranked in first place by over a quarter of respondents.

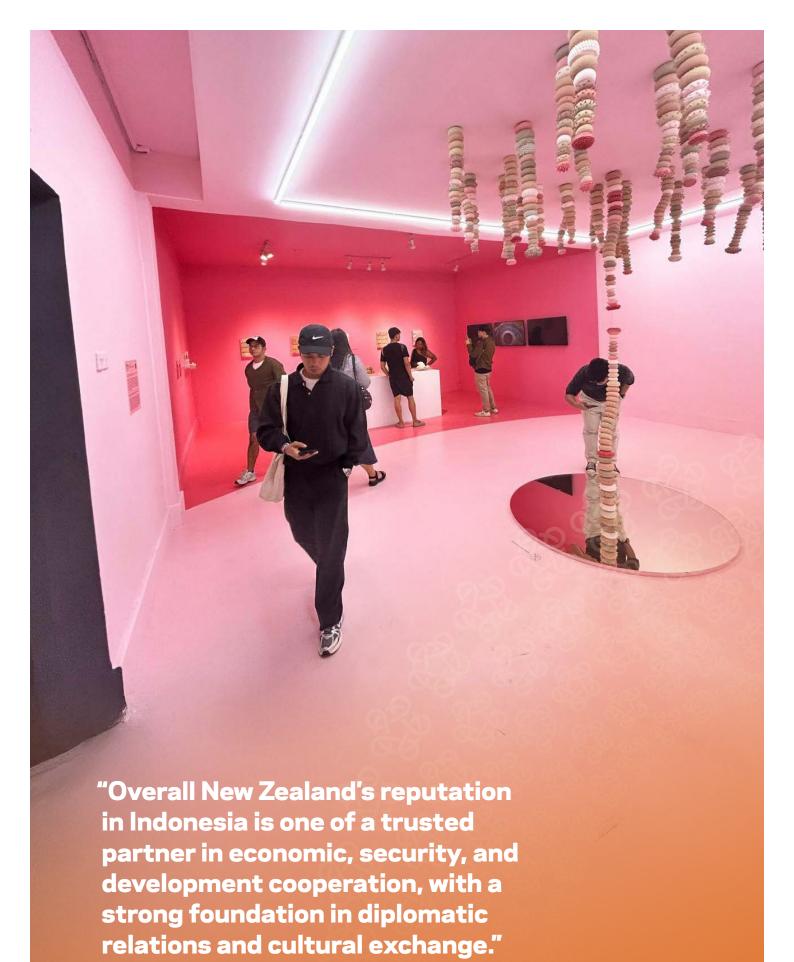
Arts, culture and entertainment were also mentioned frequently by Indonesian respondents, while Singaporeans were more likely to point to technology and science themes.

Surprisingly, sports-related stories were the least frequently mentioned.

FIG. 3: DOMINANT THEMES IN LOCAL MEDIA COVERAGE

Please rank the top three dominant themes in \_\_\_\_\_'s media coverage of New Zealand.





Indonesia



# How like-minded do respondents see New Zealand?

Respondents were asked to rate how like-minded New Zealand is to their own countries when it comes to each of the following:

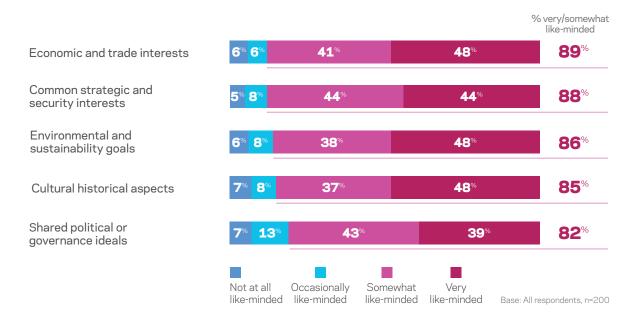
- Economic and trade interests
- Common strategic and security interests
- Environmental and sustainability goals
- Cultural or historical aspects
- Shared political or governance ideals

New Zealand is generally seen as like-minded across all five aspects, with over 80 percent of respondents across all four countries rating New Zealand as at least 'somewhat' like-minded for each category. Economic and trade interests were seen as the most aligned, followed closely by strategic security interests. New Zealand is seen as least like-minded on political and governance ideals.

Respondents from Indonesia and the Philippines tended to rate New Zealand's like-mindedness higher across the board, while Malaysian respondents were more likely to rate New Zealand's like-mindedness as lower. However at least 70 percent of Malaysian respondents rated New Zealand as at least somewhat like-minded for all aspects other than political or governance ideals (62 percent).

#### FIG. 4: PERCEPTIONS OF NEW ZEALAND'S LIKE-MINDEDNESS

In your opinion, how like-minded is New Zealand to \_\_\_\_\_ on the following aspects?



#### Strength of friendship

At least 80 percent of respondents in each country identify New Zealand as a friend or close friend – a testament to the strength of New Zealand's relationships in Southeast Asia.

Singaporean respondents have the warmest perceptions of New Zealand, with 92 percent naming it a friend or close friend. The finding aligns with New Zealanders' perceptions of Singapore as New Zealand's closest friend in Southeast Asia, and closest friend in Asia after Japan.

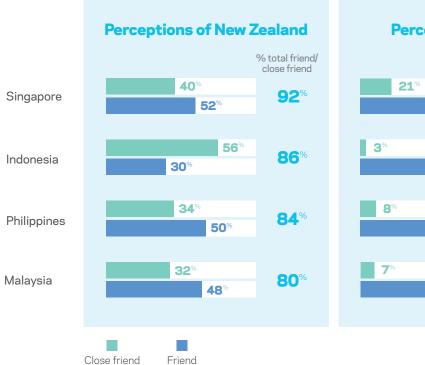
Eighty-six percent of Indonesian respondents view New Zealand as a friend or close friend, as do 84 percent of Filipino respondents.

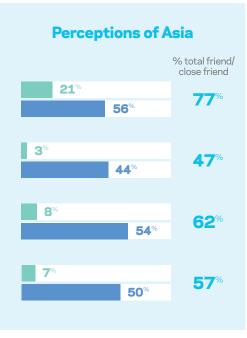
Malaysian respondents, who consistently had the lowest perceptions of New Zealand's like-mindedness, were also the least likely to rate New Zealand as a friend or close friend (80 percent).

## POA data

#### FIG. 5: STRENGTH OF FRIENDSHIP WITH NEW ZEALAND

A friendly country is one you view as safe and trustworthy. A threatening country is one you view with caution or suspicion. Do you view New Zealand as a friend or threat to \_\_\_\_\_?





# Perceptions of New Zealand's closest friends in Asia

Overall, Japan is seen as New Zealand's closest friend in Asia, followed closely by Singapore – findings that mirror New Zealanders' own perceptions of friends in the region.

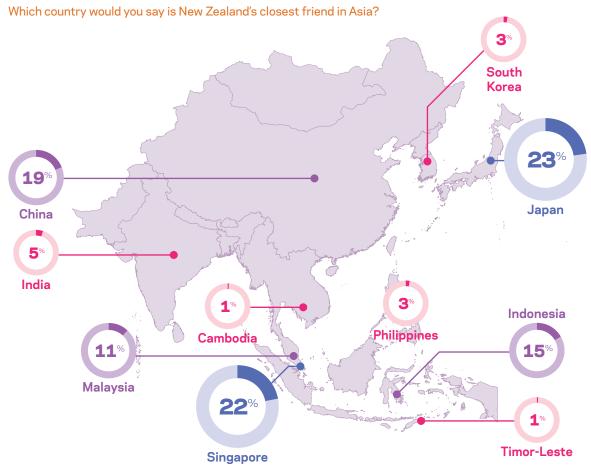
Indonesian respondents were most likely to say that Indonesia is New Zealand's closest friend in Asia (46 percent), while Malaysian respondents were most likely to name China (36 percent). Malaysian respondents who selected China pointed to close bilateral trade ties, as well as defence and security links.

Interestingly, the Philippines and South Korea, which are seen by New Zealanders as two of the friendliest countries in Asia, fall towards the bottom of the list.

Close trade and economic ties and a generally positive impression of the relationship were the leading reasons for naming a particular country as New Zealand's closest friend in Asia. Tourism, shared resources and interests as well as defence and political relations were other significant reasons.

Less weight was given to cultural similarities, migration, and people-to-people ties, which may partially explain the discrepancy between New Zealanders' perceptions of close links with the Philippines and South Korea versus Southeast Asian perceptions of these relationships. These factors are identified as important drivers of friend perceptions in the New Zealanders' Perceptions of Asia survey.

#### FIG. 6: PERCEPTIONS OF NEW ZEALAND'S CLOSEST FRIENDS IN ASIA

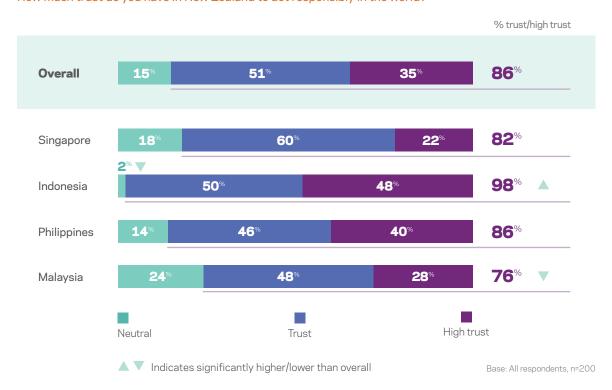


#### **Trust in New Zealand**

Overall, 86 percent of respondents express high or very high trust in New Zealand to act responsibly in the world. Trust is highest among Indonesian

respondents and lowest among Malaysian respondents, with almost a quarter of the latter saying they have "neutral" trust in New Zealand.

FIG. 7: HOW TRUSTED IS NEW ZEALAND TO ACT RESPONSIBLY IN THE WORLD? How much trust do you have in New Zealand to act responsibly in the world?



"New Zealand is recognised for its strict food hygiene standards and environmental responsibility, outperforming other premium-producing countries in ethical and environmental credentials."

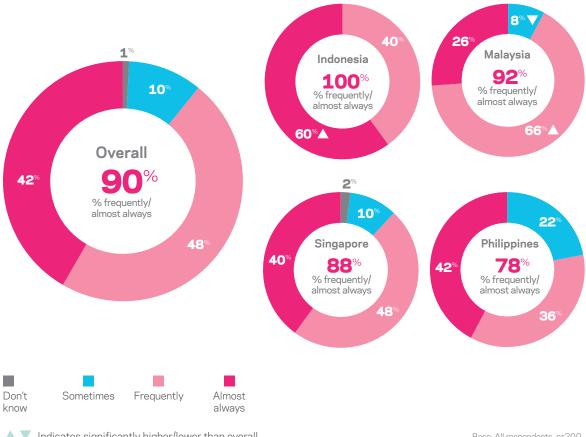
Singapore

When it comes to how often New Zealand's actions live up to its claims and promises, 90 percent of respondents said New Zealand lives up to its promises at least frequently, with 42 percent saying New Zealand almost always lives up to its promises.

Indonesian respondents were most likely to see New Zealand as consistently making good on its promises, with 60 percent saying New Zealand will almost always fulfil its claims and promises compared to 26 percent of Malaysian respondents. Still, a vast majority of Malaysian respondents believe New Zealand at least frequently fulfils its promises.

FIG. 8: HOW OFTEN DOES NEW ZEALAND LIVE UP TO ITS CLAIMS AND PROMISES?

To what extent do you think New Zealand's actions live up to its claims and promises? In other words, does New Zealand do what it says it will?



▲ ▼ Indicates significantly higher/lower than overall

# Barriers to strengthening relationships

A lack of knowledge and understanding about one another, historical, cultural and linguistic differences, and different priorities and interests are the most frequently mentioned barriers to stronger relations between the four Southeast Asian countries and New Zealand. Geographical distance was also frequently mentioned and seen as the number one barrier by 22 percent.

#### FIG. 9: THE BIGGEST BARRIERS TO STRONGER BILATERAL RELATIONS

Please rank the top 3 barriers to stronger relations between New Zealand and \_\_\_\_\_.

% included in top 3 A lack of knowledge and understanding about one another Historic, cultural and linguistic differences Different priorities and competing interests Geography - New Zealand is far away New Zealand's immigration policies and system The perception that New Zealand isn't important New Zealand's bureaucracy is too slow and/or confusing

New Zealanders are difficult to work with

#### **Areas for increased cooperation**

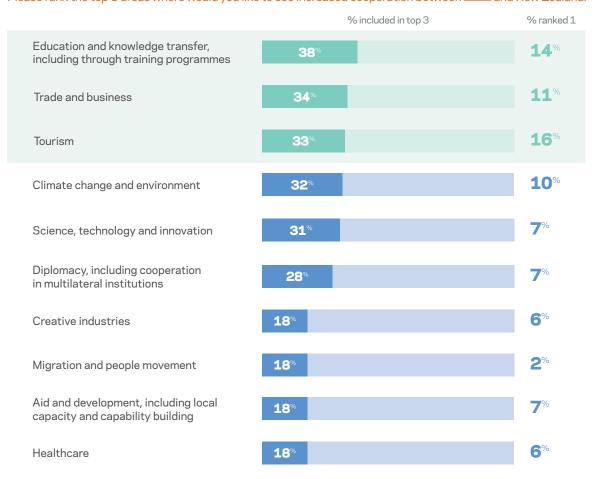
When it comes to the areas in which respondents most want to see increased cooperation between their countries and New Zealand, education and knowledge transfer dominated responses for Malaysia, Indonesia and the Philippines. Trade and business cooperation was also key for respondents from these three countries.

Increased diplomatic ties, including cooperation in multilateral institutions, rounded out the top three for Indonesia and the Philippines, while Malaysian respondents want to see more tourism ties.

Singaporean respondents, meanwhile, most want to see cooperation on tourism, climate change, as well as science, technology and innovation, likely reflecting the country's status as an advanced economy with a small land area and population.

FIG. 10: TOP AREAS FOR INCREASING COOPERATION

Please rank the top 3 areas where would you like to see increased cooperation between \_\_\_\_ and New Zealand.



"The issue that I would most like New Zealand to take a stronger stance on is balancing economic and ethical interests, regional security and sovereignty, stronger refugee and asylum policies."

Philippines





#### **Drivers of foreign policy**

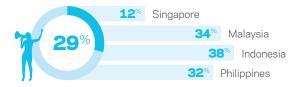
Respondents were asked to say what they saw as the single biggest driver of New Zealand's foreign policy decisions. Overall, principles and values (such as upholding democracy and the rules-based order) were seen as the top driver of New Zealand's foreign policy (29 percent), followed by trade and economic interests (26 percent), and maintaining relationships with traditional security partners (21 percent).

Singaporean respondents were less likely to see principles and values as driving New Zealand's foreign policy and instead placed more emphasis on New Zealand's desire to maintain relations with traditional security partners (28 percent), as well as ensuring regional stability (24 percent compared to an overall average of 19 percent).

#### FIG. 11: WHAT IS SEEN AS THE MAIN DRIVER OF NEW ZEALAND'S FOREIGN POLICY?

What do you see as the main driver or shaper of New Zealand's foreign policy decisions?

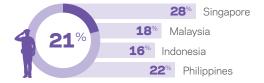
# Principles and values (such as upholding democracy, human rights and the rules-based order)



#### Trade and economic interests



# Maintaining relationships with traditional security partners



#### Security interests and regional stability



#### **Domestic political interests**



# To what extent does New Zealand maintain an "independent foreign policy"?

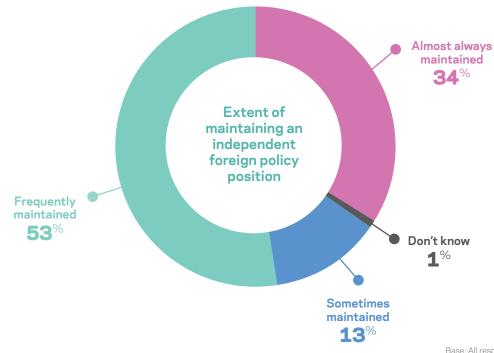
Respondents were asked how often New Zealand maintained its "independent foreign policy" – defined as commitment to a principled, rules-based foreign policy and multilateral organisations – in interactions with their countries.

Overall, 87 percent felt that New Zealand maintains its independent foreign policy at least frequently, with 34 percent saying almost always.

Indonesian respondents were the most likely to say New Zealand consistently upholds its independent foreign policy (42 percent saying almost always). Singaporean respondents were the least likely, with 28 percent saying New Zealand almost always maintains its independent foreign policy stance, a finding consistent with Singaporean respondents' views that the main driver of New Zealand's foreign policy decisions is its desire to maintain relationships with traditional security partners.

# FIG. 12: TO WHAT EXTENT DOES NEW ZEALAND UPHOLD ITS INDEPENDENT FOREIGN POLICY?

New Zealand values its "independent foreign policy", meaning its commitment to a principled, rules-based foreign policy and multilateral organisations. To what extent do you think New Zealand upholds its independent foreign policy position in interactions with \_\_\_\_\_, including where views might differ?



Base: All respondents, n=200

"New Zealand often maintains a diplomatic tone, but some would like it to speak out more firmly on issues like the treatment of minorities in Myanmar (Rohingya), China's policies in Xinjiang, or human rights conditions in Papua."

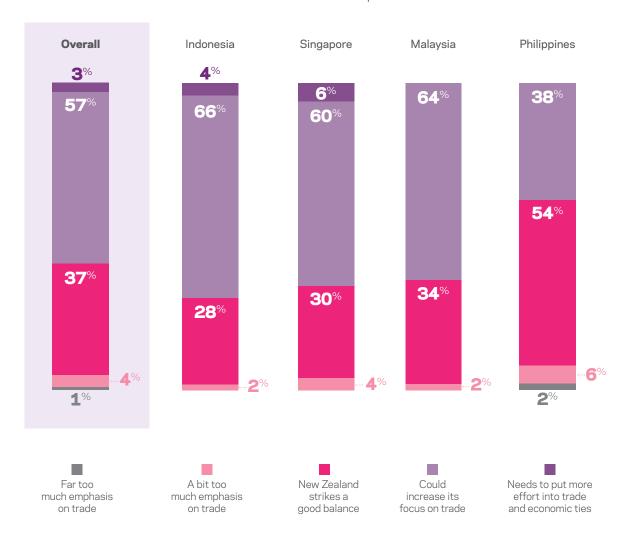
# Balancing trade and economic objectives

Respondents were asked how successfully New Zealand balances trade and economic ties within its broader relationship with their countries.

A majority of respondents in Singapore, Malaysia and Indonesia expressed a desire for New Zealand to increase its focus on trade. The Philippines was the only country where the majority of respondents said that New Zealand strikes a good balance between trade and other objectives. However, over a third of Filipino respondents (38 percent) still felt that New Zealand could increase its emphasis on trade.

#### FIG. 13: HOW WELL DOES NEW ZEALAND BALANCE TRADE AND OTHER OBJECTIVES?

Thinking about the relationship between New Zealand and \_\_\_\_\_, how well do you think New Zealand balances trade and economic ties within the broader relationship?



# What one issue should New Zealand take a stronger stance on?

A relative majority of respondents across Singapore (28 percent), Malaysia (38 percent) and the Philippines (28 percent) said climate change and the environment was the issue they most want New Zealand to take a stronger stance on.

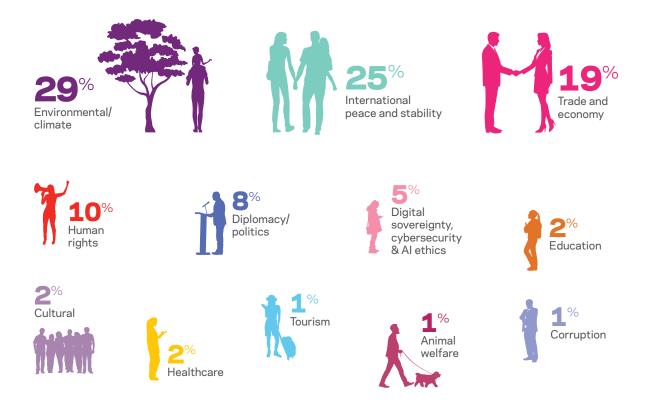
Indonesian respondents (32 percent) were more likely to express a desire for New Zealand to do more to promote international peace and stability, with climate change and environmental issues (22 percent) in second place.

The results are in keeping with the survey's earlier finding that New Zealand's striking natural environment and rich biodiversity are seen as its standout trait, and that New Zealand should therefore take a stronger role in climate action and environmental sustainability on the world stage.

Doing more to support an open, rules-based trading system and advocating for international human rights were also frequently mentioned, also in keeping with respondents' observations that New Zealand has a reputation as a safe and peaceful country. As a Muslim majority nation, respondents from Indonesia also expressed a desire for New Zealand to take a stronger stand on the Israel-Palestine conflict and do more to promote a peaceful resolution.

#### FIG. 14: WHAT ISSUE SHOULD NEW ZEALAND TAKE A STRONGER STANCE ON?

When it comes to current affairs and international relations, what issue would you most like New Zealand to take a stronger stance on?





# What global challenge should New Zealand be most worried about?

Climate change and environmental problems are the issues respondents most want New Zealanders to take a stronger stance on. Climate change is also the issue respondents think New Zealand should be most worried about. This echoes the findings of the most recent *Perceptions of Asia* survey, where New Zealanders name climate change as the second biggest threat to New Zealand's vital interests.

Global economic downturn/the rise of trade protectionism was next most frequently mentioned, and the only other issue consistently placed in the top three by respondents across the four countries.

Respondents were divided as to the other most pressing issues for New Zealand. Filipino respondents were more likely to name a major humanitarian or security situation in the Pacific, while Singaporean respondents said a conflict between major powers in Asia. Indonesian respondents were more likely to point to new resource claims in Antarctica, and Malaysian respondents were more likely to name water shortages and competition over scarce resources.

Interestingly and in a key point of difference to the latest *Perceptions of Asia* survey, only five percent think fake news and misinformation is the issue New Zealand should be most worried about. Fake news topped the list of New Zealanders' perceptions of the biggest threats to New Zealand's vital interests.

"Take a stronger stance on climate change.

New Zealand has an extreme climate change problem and New Zealand should take steps to promote global green technology cooperation and share knowledge with other countries."

Philippines

"I would love to see New Zealand take a stronger stance on climate change. Given that New Zealand has a beautiful environment, it could be a global leader in sustainability and green initiatives."

### POA data of FIG. 15: WHAT SHOULD NEW ZEALAND BE MOST WORRIED ABOUT?

From your perspective and thinking about international relations and global challenges, what do you think New Zealand should be most worried about? Perceptions of Asia

% high concern Climate change and **47**% 20° environmental problems Global economic downturn, **39**% including the rise of protectionism Major humanitarian and/or 29% security situation in the Pacific A military conflict between major **33**% powers in Asia **36**% Foreign interference in New Zealand n/a High economic contribution of tourism New resources or territory claims **22**% in Antarctica **53**% Fake news and misinformation Water shortages and competition **33**% over scarce resources The rise of authoritarian systems 43% of government around the world 40% Proliferation of nuclear weapons 41% Right wing extremism 41% Terrorism and other violent extremism **47**% Cyber-attacks from other countries **33**% Pandemics and epidemics

<sup>&</sup>quot;It is important for New Zealand to be more vocal on climate and environmental protection."

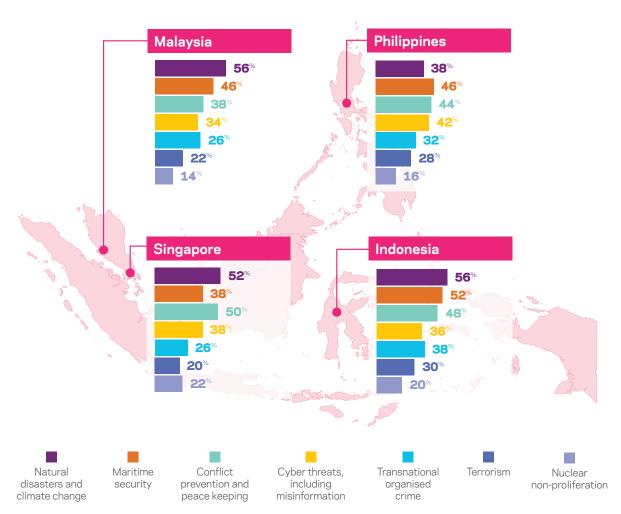
#### Security and defence cooperation

Natural disasters and climate change were identified as the most important security and defence issues on which to cooperate by over half of all respondents in Malaysia (56 percent), Singapore (52 percent) and Indonesia (56 percent).

Filipino respondents (46 percent) rated maritime security as the most important area for defence cooperation, most likely due to ongoing territorial disputes between the Philippines and China in the South China Sea. Over half of Indonesian respondents (52 percent) also named maritime security in their top three areas for cooperation.

#### FIG. 16: TOP PRIORITIES FOR SECURITY AND DEFENCE COOPERATION

When it comes to security and defence, what are the top 3 most important issues for \_\_\_\_ and New Zealand to cooperate on addressing?



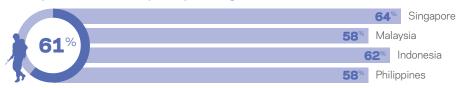
When asked which kinds of defence and security activities New Zealand should engage in with respondents' countries, security assistance and capability building was seen as the most important activity by respondents in Singapore (64 percent), Indonesia (62 percent) and the Philippines (58 percent).

Research and development was the most important activity for Malaysian respondents (60 percent), and also ranked highly by those from the Philippines, Singapore and Indonesia.

#### FIG. 17: MOST IMPORTANT DEFENCE AND SECURITY ACTIVITIES TO ENGAGE IN

When it comes to security and defence, what are the top 3 important activities for \_\_\_\_\_ and New Zealand to engage in?

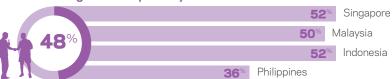
#### Security assistance and capability building



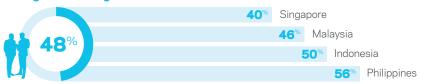
#### Research and development



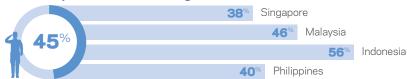
#### Defence dialogues and diplomacy



#### Intelligence sharing



#### Joint military exercises and training



#### Aid and development

Respondents were asked about the areas where New Zealand's aid and development stands out for its impact.

Education stood out among Singaporean, Indonesian and Malaysian respondents. In fact, almost three quarters (74 percent) of the Malaysian respondents named it in their top three, most likely the result of the Manaaki New Zealand scholarships and the Colombo Plan, which have supported thousands of Malaysian students to study in New Zealand since the 1950s.

Climate change assistance stood out among respondents across all four countries, particularly among Filipino respondents, with over half (54 percent) including it in their top three.

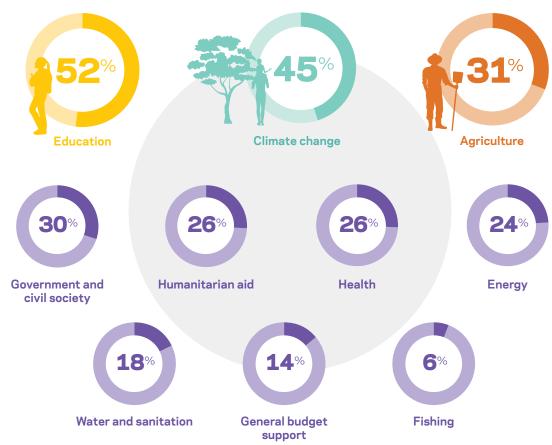
Climate change initiatives have been a particular focus of New Zealand's development initiatives in the Philippines.

Energy was an area frequently ranked highly by Indonesian respondents, likely reflecting cooperation on accelerating Indonesia's geothermal energy development.

Government and civil society initiatives were also particularly noted by respondents in Indonesia and the Philippines, while agriculture stood out among Singaporean respondents, a potential reflection of recent joint efforts to increase food security and sustainability in Singapore.

# FIG. 18: WHERE DOES NEW ZEALAND'S AID AND DEVELOPMENT HAVE THE MOST IMPACT?

When it comes to aid and development, what are the top 3 areas where New Zealand stands out in terms of delivering impact?



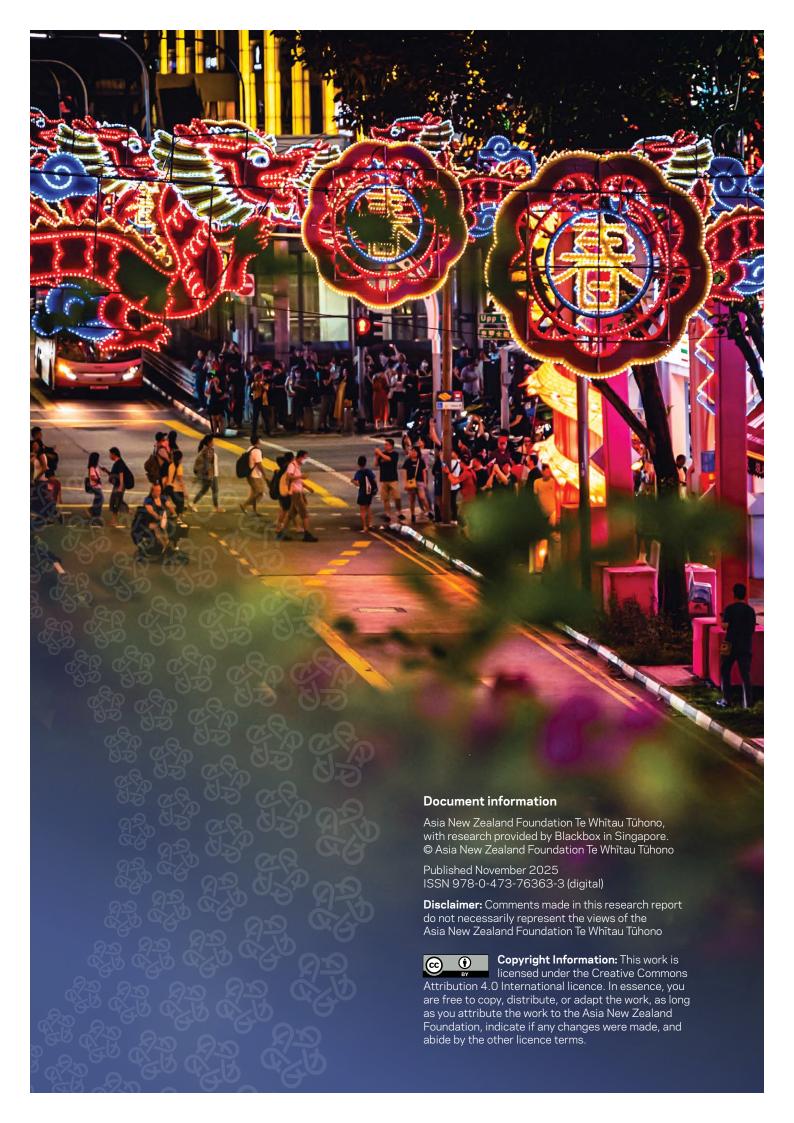
#### Our approach

This research complements the Asia New Zealand Foundation's New Zealanders' Perceptions of Asia and Asian Peoples (Perceptions of Asia) survey and provides New Zealand's research and international affairs community, media, government officials and the public with insights into how New Zealand and its foreign policy are perceived among those working in international affairs in Southeast Asia. This survey will help inform New Zealand public discourse on Asia and will be of particular use to those whose work directly involves Southeast Asia.

This report presents the results from a survey of 200 international affairs experts across Southeast Asia, with 50 from each of Singapore, Malaysia, Indonesia and the Philippines. Respondents are aged between 31 and 70 years and have been screened to ensure a certain level of knowledge about New Zealand foreign policy. Sixty percent of respondents have been working in international affairs for at least six years. No respondent has lived in New Zealand for longer than five years.

A portion of the questions in this survey directly mirror the *Perceptions of Asia* survey to allow for points of comparison, while others are specific to this survey and intended to gain deeper insights into Southeast Asian perceptions of New Zealand's Asia relationships and foreign policy.

The survey was administered by Blackbox in Singapore and carried out between 16 May and 26 May 2025.



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