

NEW ZEALANDERS' PERCEPTIONS OF ASIA AND ASIAN PEOPLES

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Foreword from the Chief Executive



This year's *New Zealanders' Perceptions of Asia and Asian Peoples* survey provides fascinating insight into how an increasingly diverse and connected New Zealand is seeing its Asia relations, both at home and abroad. Now in its 27th year, the survey provides a rich data set for researchers, commentators, teachers, Members of Parliament, officials, diplomats, and others who are keen to better understand how and why New Zealanders perceive Asia relations the way they do. There are some clear trendlines emerging.

At home in New Zealand there is no question that as our population has become more diverse, New Zealanders of Asian heritage are helping to shape and inform our community relations, culture, workplaces, policies and outlook. In this year's survey, we highlight how these New Zealanders are seeing our Asia relations and what they think about events taking place across the region. We also ask whether they think their heritage has helped or hindered their career progression in New Zealand, and whether they think their skills, knowledge and networks are being used to full effect to help New Zealand navigate an increasingly complex region. Their answer is no.

In line with previous years, when New Zealanders think of Asia they first and foremost think of China — but they also think about their stomachs! Food has always been a popular association, offering insights into culture and providing New Zealanders with an enjoyable way to connect to Asia in their daily lives. We are also seeing arts and sporting connections grow, and entertainment produced in Asia being consumed with greater frequency, particularly by young New Zealanders.

New Zealanders continue to view Asia as very important to New Zealand's future, with countries such as Japan, Korea and Singapore increasingly

seen as trusted friends in the region. Equally, we are seeing warming sentiment towards India and a growing sense of the importance of South Asia to New Zealand's future — not just for travel, family and work, but also to help navigate some of the region's challenges.

Threat perceptions are high for Russia and North Korea but have softened slightly for China. In 2022, more New Zealanders saw China as a threat than a friend. This year, we have seen a very slight reversal, with more New Zealanders seeing China as friendly than threatening, though sentiment remains mixed. Overall, New Zealanders see China as a country that is complex but important to New Zealand's economy, and one that will continue to have strong influence both now and in the future.

Being knowledgeable about Asia is seen to be important for New Zealand and for our workforce, as is understanding the region's norms, etiquettes, and traditions. It's really pleasing to see self-assessed knowledge of Asia at an all-time high (almost 60 percent), despite opportunities to learn about Asia and Asian languages through our universities and schools sadly diminishing.

If there was one clear message coming from this year's *Perceptions of Asia and Asian Peoples*, it's that Asia is going to continue to be a hugely consequential part of New Zealand's future — the need to understand the region and New Zealand's connections to it is only growing in importance.

Suzannah Jessep

Chief Executive
Asia New Zealand Foundation
Te Whītau Tūhono



Executive Summary

Asia's importance and influence

Our latest *New Zealanders' Perceptions of Asia and Asian Peoples* survey highlights the centrality of Asia to New Zealand's future. Three in four New Zealanders believe Asia is 'important' or 'very important' to our future, with North Asia and South Asia seen as increasingly important sub-regions.

In 2023, India overtook Singapore as the third most important Asian country to New Zealand's future, following China and Japan. China is seen as having the most influence over New Zealand over the next 10-to-20 years, and New Zealanders also expect India's future influence to increase.

Friend or threat

This survey also finds growing awareness of the nuances of New Zealand's relationships with countries across Asia. Since 2017, we have asked whether countries are seen as friendly or threatening to New Zealand. This year, we wanted to dig deeper into why. While reasons varied country to country, some common themes emerged: countries are seen as friendly when we have strong trade and economic ties, tourism links, perceptions of shared values, community connections through diaspora, and similar political systems.

On the other hand, non-democratic countries, particularly those with nuclear capabilities and foreign policies seen as aggressive or expansionist, are more likely to be seen as threatening.

Although New Zealanders believe trade is the most important means to strengthen relations with Asia, continued mixed views of China — our biggest trading partner — show perceptions of shared values and similar political systems also matter.

Knowledge of Asia

Japan is both the country New Zealanders feel they know best and the country they most want to know more about.

Friends and family are typically the key sources of information for places New Zealanders know most about. Visiting the country is also an important source of information for Thailand, Vietnam and Indonesia, underscoring the vital role people-to-people links play in fostering knowledge and interest.

Connections in daily life

Over half (55 percent) of New Zealanders report feeling connected to Asian cultures in their daily lives, up from 43 percent in 2019. The proportion of those who feel a strong connection, however, has continued to decline since 2020.

Areas of concern

This survey reveals that while on balance most New Zealanders expect the Asian region to have a positive impact on New Zealand's future, environmental issues as well as political stability and security in the region are areas of ongoing concern. The proportion of New Zealanders expecting positive effects from immigration from Asia has also declined since the previous survey.

New Zealanders of Asian heritage feel they have useful skills to help advance New Zealand-Asia relations, however they often feel their heritage has negatively impacted their own career trajectories.

Similarly, while a majority of Māori see Asia as important to New Zealand's future, only 40 percent feel that Māori benefit from cultural and economic ties to the region.

Introduction

Our approach

The *New Zealanders' Perceptions of Asia and Asian Peoples* is a flagship annual survey providing the only longitudinal data on New Zealand's engagement with Asia. Now in its 27th year, the survey provides New Zealand's research and international affairs community, media, government officials and public with insights into New Zealanders' connections to and perceptions of Asia. The survey informs New Zealand public discourse on Asia and the Foundation's plan of work to equip New Zealanders to thrive in Asia.

While maintaining the longitudinal nature of the survey, we have updated the questionnaire to gain new insights into perceptions of the most influential countries of Asia and countries of greatest interest to New Zealanders. The findings generated from these newer questions are relevant for a range of sectors in New Zealand and for New Zealand decision-makers shaping the future of New Zealand-Asia relations.

This report presents the results from a survey of 2,300 New Zealanders aged 15 years and over, conducted between 6-28 November 2023. Survey results have been weighted using 2018 Census data so that they are representative of New Zealanders by age, gender, ethnicity and geography.

Changes

There were some changes in 2023.

Fieldwork and data analysis was undertaken by Ipsos New Zealand.

The 2023 survey questionnaire contained some new questions to offer insight into perceptions of the following:

- The countries that have the most influence over New Zealand now and are expected to have the most influence in the future, and the reasons for these views.
- Why particular countries are seen as friends or threats.
- The places in Asia that New Zealanders feel they know best and the places they most want to learn more about.
- Māori relationships with Asia.
- New Zealand's Asian diasporas: perceptions of unique skills to help New Zealand succeed in Asia and biggest opportunities for New Zealand in Asia.
- Asia-related topics of interest in the New Zealand media.
- Sources of news coverage on Asia.

There were also minor changes and improvements to survey questions and response options, and removal of some questions to make way for the new.

Context for the survey

Events happening during the year and at the time of fieldwork inevitably influence survey responses. The issues, media reports and events outlined below happened around the time the survey was undertaken. They may have impacted New Zealanders' perceptions and responses:

- The Hamas attack on Israel on 7 October 2023, and the subsequent Israel-Gaza conflict and Gaza humanitarian crisis.
- The New Zealand general election held on 14 October 2023.
- The Pacific Islands Forum held in the Cook Islands from 6-10 November 2023, and coverage of China's presence, and competition with the United States, in the Pacific.
- North Korea's launch of a military spy satellite and South Korea's decision to partially suspend a 2018 military agreement.
- Coalition agreements announced on 24 November 2023, that included commitments to "prioritise free and fair-trade agreements, including with India" and to amend visa settings for the parents of New Zealand residents.
- The ongoing coverage of Russia's continuing aggression against Ukraine.





1 Asia Outlook





“We continue to rely on Asia for imports and exports, as well as on their labour and student exchange programmes. We need Asia to continue to strengthen our economy and connect New Zealand to the rest of the world. I am of mixed-race heritage and Asian descent, so for me I believe that fostering these ties is immensely positive.”

Do New Zealanders view Asia as an important part of their future?

This section looks at New Zealanders' perceptions of the importance of Asia and its sub-regions to New Zealand's future.

Key findings

New Zealanders believe it is important to develop ties with Asia, primarily to strengthen trade and tourism links, but also to contribute to regional stability and security and tackle global issues like climate change.

Asia is considered the second-most important region to New Zealand's future after Australia.

China and Japan are the two Asian countries considered most important to New Zealand's future, with India ranking third.

South Asia is now seen to be as important to New Zealand's future as Southeast Asia.

New Zealanders think growing ties with Asia is important

Two out of three New Zealanders (65 percent) believe that developing political, economic and social ties with the peoples and countries of Asia is important, while one in five (21 percent) do not think it is important.

Those aged between 25 and 39 years old are more likely to attach importance to developing ties (73 percent) than those belonging to other age groups. Similarly, New Zealanders of Asian heritage are more likely than those of other backgrounds to see developing such ties as important (75 percent). New Zealanders who live in small towns or rurally are less likely to see developing ties as important (57 percent).

Perceived importance is also higher among those with Asia connections: 70 percent of those who have travelled to Asia consider it important to develop ties, compared with only 57 percent of those who have never travelled to Asia. Those with strong connections to Asian cultures in their daily lives consider it more important (73 percent).

New Zealanders have different reasons for why Asia is 'very important' to New Zealand's future. Some of the most frequently mentioned include:

Trade

- The Asia region is considered a growing economic powerhouse and economic alignment is seen as critical to New Zealand's future. Trade relationships and export potential for New Zealand goods dominated responses.

- Asia's demographics along with its growing middle class were acknowledged as presenting good trading opportunities.
- Some noted New Zealand's reliance on trade with China and the need to maintain a good relationship in order to keep this trade steady.
- Others noted the importance of technology and technology cooperation with Asia as well as the importance of tourism for services trade.

Security and stability

- Aligning with other likeminded countries in Asia is considered vital for New Zealand's security and geopolitical stability, and as a means of reducing the risk of conflict. The benefits of countries working cooperatively to tackle global issues like climate change were also identified as an important reason for developing ties with Asia.

People connections

- New Zealanders acknowledge the value of immigration from Asia to New Zealand for our communities and workforce.

New Zealand in Asia

- Reciprocity is a factor: some New Zealanders talked of their desire to see New Zealand use its influence to help improve human rights in some Asian countries. Others acknowledge that New Zealand's need to grow ties with Asian countries is greater than Asian countries' need to develop links with New Zealand.

“I think all international ties are more important than ever as the world has become less about individual countries and more about nations being part of a global enterprise.”

30-34 years, female, New Zealand and other European heritage, Taranaki

Asia is considered the second-most important region to New Zealand's future after Australia

New Zealanders consider Asia to be the second-most important region to New Zealand's future after Australia — a position it has held since 2017 when the question was first asked. In this year's survey, 75 percent of New Zealanders consider Asia to be important, a three percentage point jump from the year prior.

Those of Asian heritage are most likely to consider Asia to be important to New Zealand's future, with 81 percent thinking it important. Those aged 30 and over are more likely to consider Asia important to New Zealand's future than the under 30 age group (80 percent compared with 60 percent). Those aged 30 and over also attach greater importance to Australia, the United Kingdom and

North America compared with the under 30 age group. Male New Zealanders rate the importance of Asia more highly than females (81 percent compared with 69 percent).

New Zealanders who have a connection with Asia attach greater importance to the region than those without any connections. Eighty-three percent of New Zealanders who have travelled to Asia consider Asia an important region for New Zealand's future, compared with 64 percent of those who have never travelled to the region.

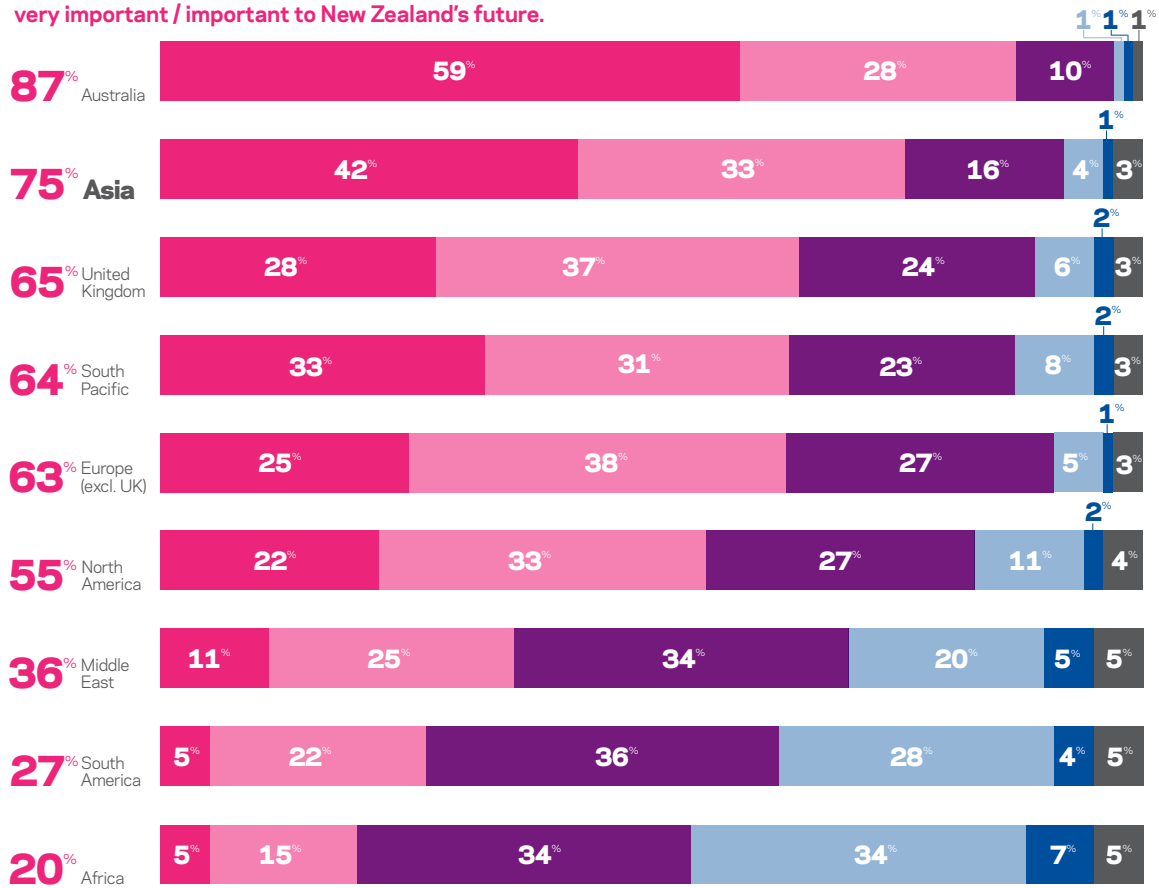
“Asia — specifically India, China, Japan, Korea, Vietnam are huge existing and emerging trading partners with New Zealand. They are also areas with personal wealth and where people want to travel to New Zealand for tourism, education and allied disciplines.”

35-39 years, male, Māori heritage, Northland

Figure 1

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

Percentage of people who think the following regions are very important / important to New Zealand's future.



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

Source: K2 – How important do you think each of the following regions are to New Zealand's future?

Base: All New Zealanders - (2023) n=2,300

South Asia is now seen to be as important to New Zealand's future as Southeast Asia

North Asia continues to be considered the most important Asian sub-region for New Zealand's future, with 76 percent regarding it as important (an increase from the 71 percent observed in 2022). Perceptions of the importance of South Asia continue to strengthen (increasing from 37 percent in 2020, to 40 percent in 2022, and to 46 percent in 2023). Its perceived importance now matches that of Southeast Asia (47 percent).

There has been a slight increase in the perceived importance of Southeast Asia between 2022 and 2023, and it is significantly higher than in 2020, when 42 percent rated it as important.

Note: sub-regions were defined as follows:

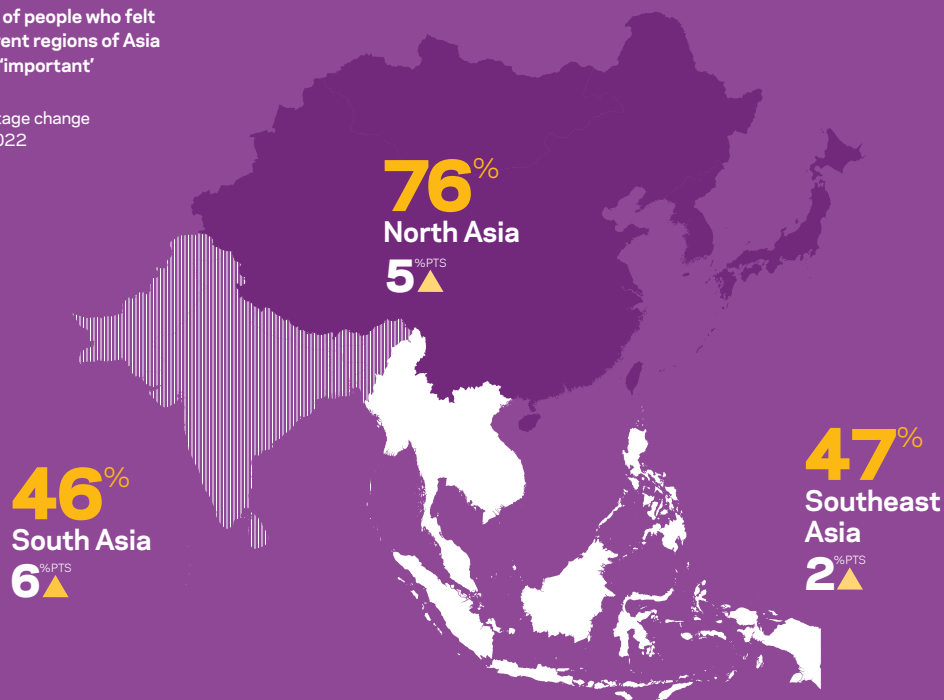
- North Asia (including countries such as China, Japan and South Korea)
- Southeast Asia (including countries such as Singapore, Thailand and Malaysia)
- South Asia (including countries such as India, Sri Lanka and Bangladesh).

Figure 2

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

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

▲ Percentage change from 2022



Source: K3 - How important do you think each of the following Asian regions are to New Zealand's future?

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

China, Japan, India, Singapore and South Korea are considered the most important Asian countries when it comes to New Zealand's future

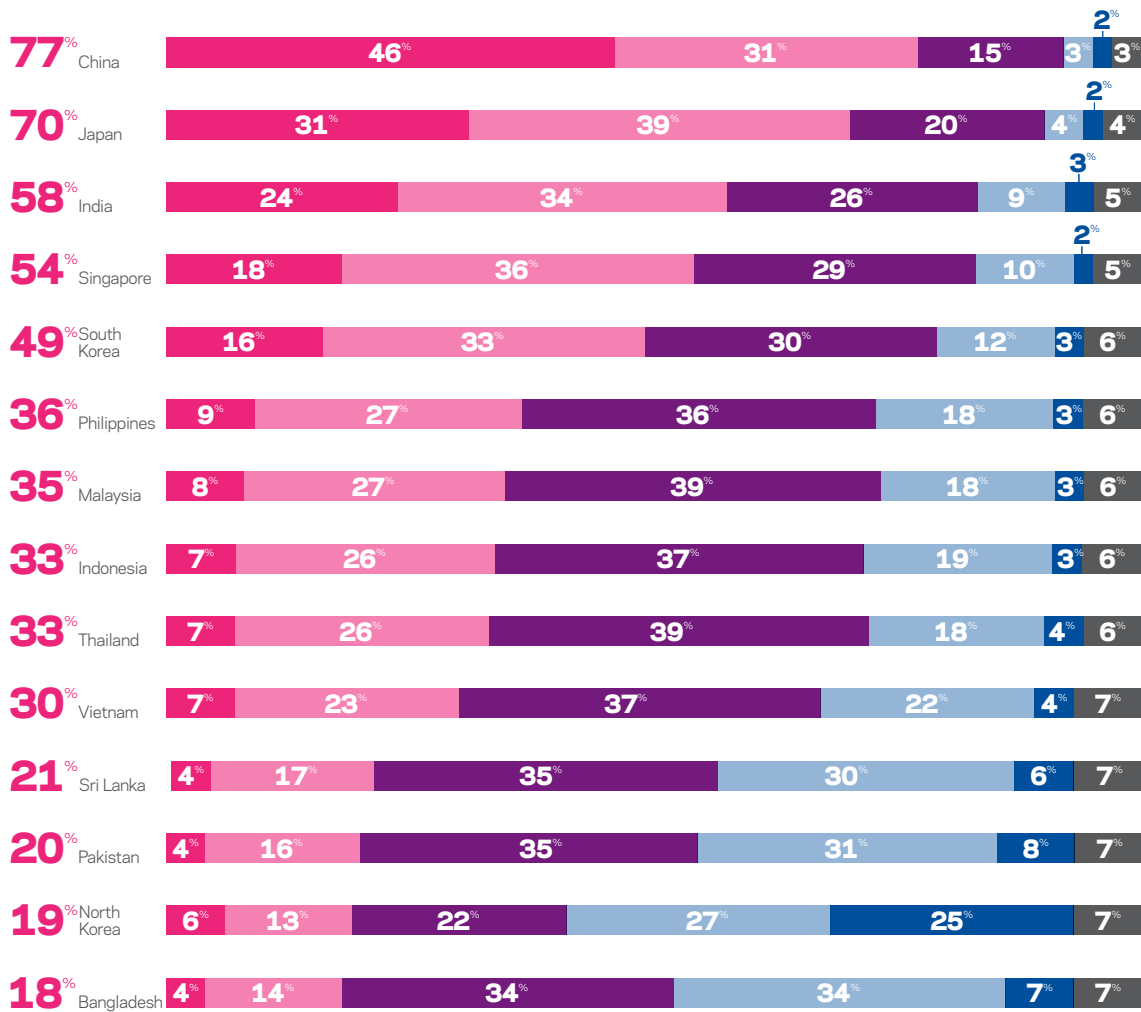
Of the 14 countries assessed, China and Japan are considered the two most important countries to New Zealand's future, with at least seven in ten New Zealanders rating them as important (77 percent for China and 70 percent for Japan). Both are rated more important than in 2022, with increased levels of 'very important' ratings (up from 39 percent to 46 percent for China, and 26 percent to 31 percent for Japan).

In this year's survey, India has overtaken Singapore as the third most important country to New Zealand's future (increasing from 52 percent to 58 percent). Singapore is the only other country rated as important by at least half of those surveyed (54 percent importance rating compared with 53 percent in 2022). However, South Korea continues to rate a close fifth in importance with 49 percent considering it important (compared with 48 percent in 2022).

Figure 3

How important are Asian countries to New Zealand's future?

Percentage of people who think the following countries are very important / important to New Zealand's future.



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

Source: K4 - How important do you think each of the following Asian countries are to New Zealand's future?

Base: All New Zealanders - (2023) n=2,300



“We live in a global community and we need to develop relationships to prevent conflicts and foster each other’s growth to allow the free flow of information, ideas and technological breakthroughs, [and] to maintain and develop free trade agreements.”

35-39 years, female, European, Manawatu-Wanganui

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How do New Zealanders perceive regional political, security and economic dynamics?

This section considers how friendly or threatening New Zealanders perceive Asian countries to be, and which places they consider to be most influential in regional affairs.

Key findings

New Zealanders view Japan and Singapore to be the most friendly countries in Asia followed by South Korea, the Philippines and India. Trade partnerships, tourism and common value systems contribute to friend perceptions.

China is considered both a 'friend' and a 'threat', with its economic and political rise presenting both opportunities and challenges.

Russia and North Korea continue to be regarded as the major 'threats' globally. Acting aggressively toward other nations with threats of nuclear weapons heightens threat perceptions.

While Japan is the country most trusted to act responsibly in the world, China and Russia are the least trusted to act responsibly.

Japan is considered New Zealand's most important defence and security partner in Asia.

New Zealanders regard China as the Asian country that has the most influence over New Zealand now and over the next 10-to-20 years. They anticipate that India will have a growing influence in the coming years.

Climate change, fake news, and cyber-attacks top concerns about threats to New Zealand's vital interests.

What countries do New Zealanders view as friends or threats in Asia and across the globe?

New Zealanders were asked to rate which of 22 countries across the globe they view as 'friendly' or as a 'threat'. A friend was defined as a country viewed to be safe and trustworthy; a threatening country as one viewed with caution or suspicion.

Three commonwealth countries continue to lead the 'friends' group:

Australia, the United Kingdom and Canada are viewed as being most friendly to New Zealand, with Australia at 92 percent, the United Kingdom at 83 percent and Canada at 79 percent.

Australia has gained in positive sentiment: in 2023, 92 percent regard Australia as friendly, an increase of four percentage points on the 2022 result of 88 percent. The strength of the Australia-New Zealand friendship is also greater: in 2023, 69 percent said they consider Australia a close friend, while in 2022 57 percent thought so.

New Zealand's closest 'friends' in Asia are Japan and Singapore, followed by South Korea, the Philippines and India:

Japan has consistently been seen as the friendliest Asian nation to New Zealand, with 75 percent rating it as a friend in 2023. Japan ranks fourth of the 22 nominated countries. Singapore ranks fifth overall, with 69 percent viewing it as friendly to New Zealand.

Over half of those surveyed regard South Korea, the Philippines and India as friendly to New Zealand, with these countries ranking in positions nine to 11 of the 22. Fifty-three percent view South Korea as friendly, 53 percent view the Philippines as friendly and 52 percent view India as friendly.

Views of China's status as 'friend' or 'threat' continue to be mixed:

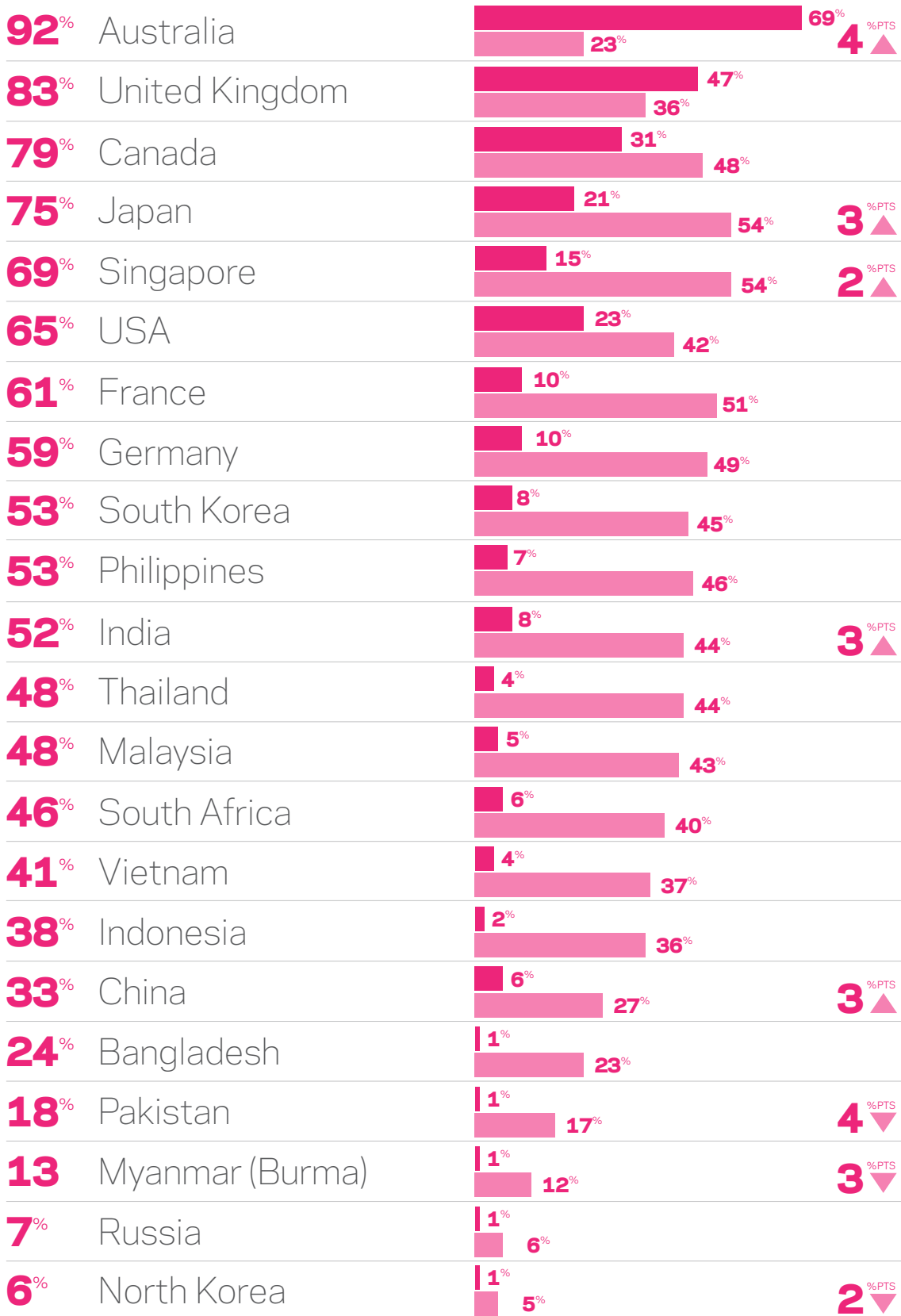
In this year's survey, 33 percent say they regard China as a friend, compared with 30 percent in the previous survey. Thirty-two percent of New Zealanders consider China a threat, down from 37 percent in 2022. China ranks third in terms of countries viewed as a 'threat'.

Russia and North Korea continue to be perceived as the two major 'threats':

Over six in ten New Zealanders identify North Korea and Russia as threats (69 percent for North Korea and 66 percent for Russia) while fewer than 10 percent regard each as a friend. There has been no change in the perceived status of North Korea. However, compared with 2022 (the first year of Russia's invasion of the Ukraine), perceptions of Russia as a 'threat' have declined by six percentage points from 72 percent.

Figure 4

Which countries are friends to New Zealand?



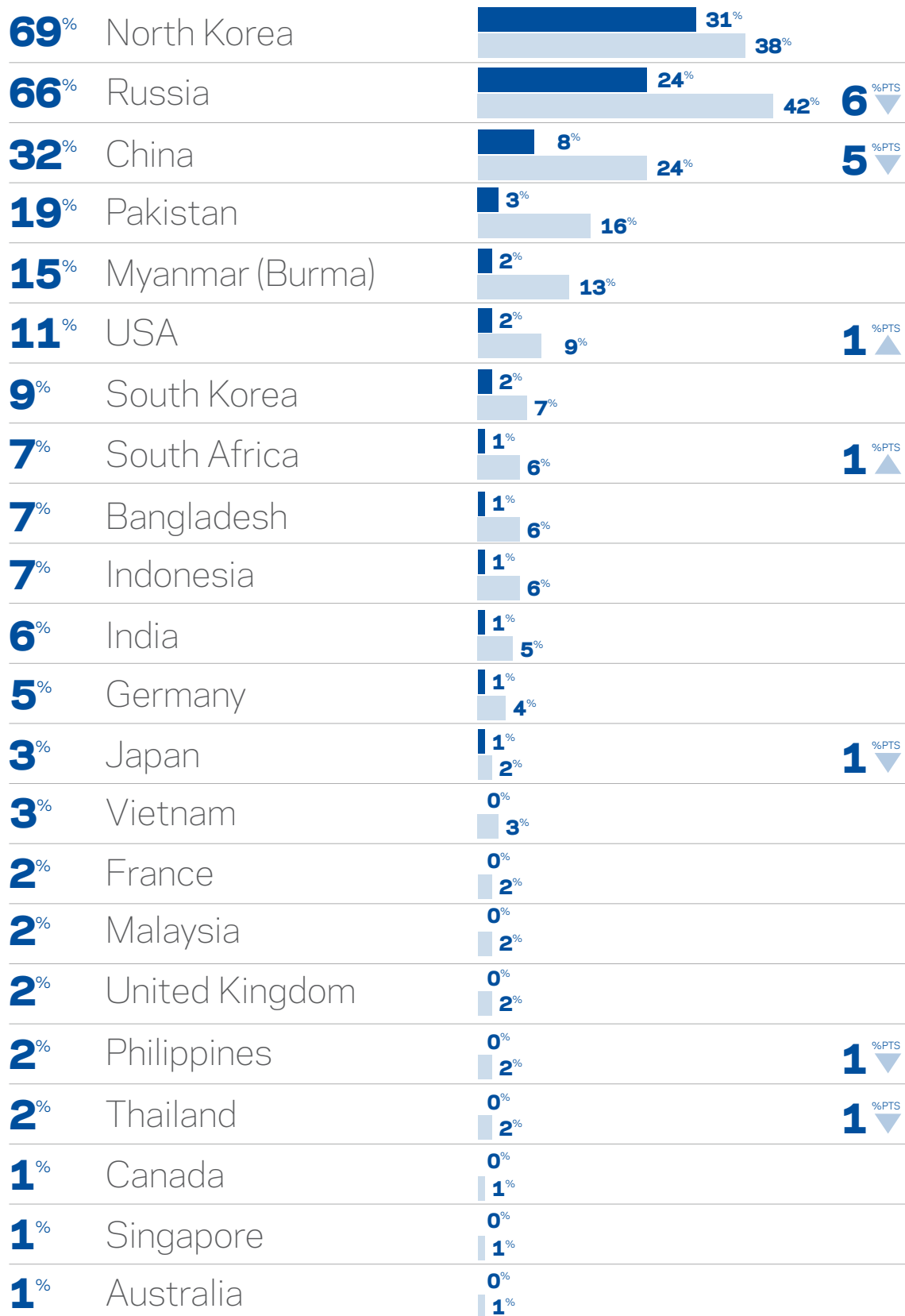
● Close friend ▲ Significantly higher/ lower than 2022
 ● Friend

Source: P1 - A friendly country is one you view as safe and trustworthy. A threatening country is one you view with caution or suspicion. For each country below, do you view them as a friend or a threat to New Zealand

Base: All New Zealanders - (2023) n=2,300

Figure 5

Which countries are threats to
New Zealand?



● Major threat ▲ Significantly higher/
● Threat ▼ lower than 2022

Source: P1 - A friendly country is one you view as safe and trustworthy. A threatening country is one you view with caution or suspicion. For each country below, do you view them as a friend or a threat to New Zealand?

Base: All New Zealanders - (2023) n=2,300

Friendship perceptions are enhanced through trade and economic partnerships, tourism, immigration and shared value systems

In 2023, we wanted to dig deeper into why New Zealanders view countries as a friend or threat. When asked their reasons for viewing specific countries as a friend, common themes emerge, although these are articulated slightly differently for each country:

- Trade and economic partnerships are considered a cornerstone for building positive relationships.
- Shared tourism ties help create connections and friendships, as do diaspora populations within New Zealand.
- New Zealanders also take into account the country's political system and stability, and its similarity to New Zealand. Shared historical ties through current or past Commonwealth membership contribute to a sense of shared value systems and common interests for countries like Singapore and India, but not so for countries like Pakistan.

Figure 6

Why do New Zealanders view countries as friends?



Source: P2 - Why do you view <named country> as a friend?

Base: All New Zealanders - (2023) n=2,300

Japan

75 percent of New Zealanders view Japan as a friend

Three in four New Zealanders regard Japan as a friend to New Zealand. They note strong trade relationships and tourism ties between the two countries. Japan is considered a peaceful nation with shared interests, on both political and security issues. Both countries are in earthquake zones and have helped each other in times of crisis. New Zealanders think that Japan has much to offer from a technology perspective.

“New Zealand and Japan share common values, like democracy, human rights, rule of law. [The two] countries often collaborate on international issues, including climate change, disaster relief.” 25-29 years, female, Chinese heritage, Auckland

“Close political, commercial and sports ties. Easy to do with business with and are a sophisticated friendly society.” 35-39 years, male, European and Māori heritage, Tasman

Singapore

69 percent of New Zealanders view Singapore as a friend

Seven in ten New Zealanders regard Singapore as a friend to New Zealand. Singapore is considered to be a politically stable country, with a democratic government and strong ethical values. New Zealanders note its historical ties with New Zealand and close bilateral trading relationship. Singapore is considered a prosperous country with a strong economy that provides a hub for New Zealand in Asia. Compared with other Asian countries, Singapore is viewed as being a safe and friendly place to visit.

“They are a country with extremely high standards both in business integrity and social morals which New Zealand should aspire to. Singapore has now been regarded as the new Hong Kong as a global financial hub which New Zealand should be a part of by ensuring friendly relationships continue.” 40-49 years, male, New Zealand and other European, Canterbury

South Korea

53 percent of New Zealanders view South Korea as a friend

New Zealanders who regard South Korea as a friend commented on it being a stable democracy with a similar value system to New Zealand. They note that, like New Zealand, South Korea relies on strong international relationships. South Korea's technological advancement offers New Zealand potential benefits, building on existing trade relationships.

“High international technological contribution, stable economy and government, no military or economic threat to New Zealand.” 20-24 years, female, European, Southland

“There's a strong Korean community in New Zealand already. There seems to be good and growing investment from them in New Zealand, both in terms of trade and tourism, and with the free trade agreement we're getting even closer.” 20-24 years, female, European, Wellington

The Philippines

53 percent of New Zealanders view the Philippines as a friend

The hard-working and friendly nature of Filipinos who have migrated to New Zealand is a key reason why New Zealanders see the Philippines as a friendly country. New Zealanders are aware of the value that Filipino people bring to New Zealand's workforce, particularly in healthcare, and talked of positive interactions with those they know.

“Through immigration, I have met many Filipino people and without exception they have been good citizens of New Zealand. They speak highly of New Zealand and our relationship with the Philippines.” 35-39 years, male, European, West Coast

“They have very friendly people and they are very hard-working people. I have come across a few Filipino people and their work ethic is always great. So, they really contribute to the economy by working it.” 20-24 years, female, Tongan ethnicity, Auckland

India

52 percent of New Zealanders view India as a friend

Those who regard India as a friend to New Zealand view both countries as sharing similar cultural, economic, sporting and democratic values. Both have historical ties due to Commonwealth membership. They note the fact that India is a fast-developing country with which New Zealand has a strong trade relationship. As with the Philippines, comments were made about the large number of Indian people who have migrated to New Zealand.

"We have some similarities from earlier British ties and also have many people who are of Indian ethnicity as citizens and residents here." 40-49 years, male, European, Bay of Plenty

"Tea and other foodstuffs importation, rich culture, big population, stable-ish political situation, I think." 18-19 years, female, European, Otago

"It is a democratic nation with secular credentials, a stable government and growing economy." 30-35 years, male, Indian heritage, Auckland

China

33 percent of New Zealanders view China as a friend

One in three New Zealanders regard China as a friend, primarily because of New Zealand's strong trading relationships and tourism links. Some talked of the importance of China being a friend to New Zealand because of its huge economic power and influence both across Asia and globally. Others spoke of the benefits of Chinese migration to New Zealand.

"New Zealand has a good trade relationship, and Chinese immigrants and culture have had a positive impact on New Zealand's economy." 25-29 years, male, European, Gisborne

"It is a major trading partner interested in building and maintaining friendly relationships with New Zealand." 40-49 years, male, other European, Wellington



Countries led by dictatorships and those that act aggressively towards other nations are considered the greatest threats

When New Zealanders were asked their reasons for considering specific countries as a threat, the following common themes emerge:

- Countries with politically and/or religiously based ideologies that are antagonistic toward western countries.
- Countries that are politically unstable and/or viewed as being corrupt.
- Countries that are led by oppressive dictatorships and/or political regimes.
- Countries that are actively aggressive towards other nations (such as Russia's aggression toward Ukraine).
- Countries with nuclear capability, coupled with political instability.

Figure 7

Why do New Zealanders view countries as threats?



Source: P3 - Why do you view
<named country> as a threat?

Base: All New Zealanders - (2023)
n=2,300

North Korea

69 percent of New Zealanders view North Korea as a major threat

North Korea is the threat of greatest concern to New Zealanders. This view is based on a perception of North Korea as a closed, isolated and introverted authoritarian state, with a disregard for human rights.

The greatest perceived threat is its leadership. Kim Jong Un is seen as an unstable, unpredictable and irrational dictator. North Korea's military and nuclear capabilities are considered very dangerous to global order.

"They are introverted, they have a dictatorship that doesn't like western democracies. Due to our relationships with Australia, [the] USA and Britain we are a natural enemy." 35-39 years, male, European and Māori heritage, Wellington

"North Korea is a threat to [al]most any country, I think! Long standing dictatorship, ruthlessness, corruption and untrustworthy governance make it hard to create any sort of ties. Their views on war and past actions are a cause of concern. In saying this, though, we have no direct conflict with them. Potentially more of a threat in the future." 25-29 years, female, ethnicity not stated, Auckland

"They have great nuclear power, commit human rights violations, and are cut off from the rest of the world." 18-19 years, female, European, Auckland

"Their leader is dangerous. An isolationist country that seems to view the Western world as enemies. Is a dictatorship and anti-democratic. Is constantly building arms capability and threatening to use it." 40-49 years, female, other European heritage, Auckland

Russia

66 percent of New Zealanders view Russia as a major threat

Russia is considered a threat because of distrust of its leader, Vladimir Putin, who is considered dangerous, unstable, and seen as holding a monopoly on power. New Zealanders expressed concerns about Russia's anti-western stance, talking of its involvement in efforts to destabilise the economies and democratic systems of other countries. Strong concern was expressed about the potential escalation of Russia's military aggression against Ukraine and potential use of nuclear weapons endangering the world.

"Nuclear capabilities, Putin's desire to leave the legacy of retaking former Soviet states and the former Baltic territories. Russian dark money meddling in politics and attempts to cause social upheaval—which has worked in countries such as [the] UK. Attempts to destabilise economies. The war in Ukraine. Annexation of Crimea. Agents using Novichok on foreign soil. Etc." 30-34 years, female, European, Canterbury

"They're behind a lot of cyber-attacks, misinformation and election meddling." 25-29 years, female, European, Auckland

China

32 percent of New Zealanders view China as a major threat

Those who consider China a major threat note that it is a major global power intent on its own agenda, and that it has an autocratic and dictatorial leadership style that doesn't sit comfortably with New Zealanders' political values. China's perceived expansionist interests, both in the South China Sea and across the Pacific, are of concern, with many mentioning its lending practices to smaller or developing countries and political influence. Meanwhile, its volatile relationships with the United States and Australia are seen as leaving New Zealand in a vulnerable position. China is also considered to be aligned with Russia.

China's human rights record was mentioned as an additional concern, as was the impact of its development activities on the environment (particularly in the South Pacific).

"Although we have significant trade, family and other connections with China, it is an extremely large economically and militarily powerful nation with strong authoritarian, oppressive and expansionist tendencies. In addition, while some of our economic interests may complement one another, our political values, human rights and international relations largely do not (such as in regard to the South China Sea, Taiwan, espionage and illegal foreign influence)." 35-39 years, male, European, Canterbury

"Probably more of a mild threat than others, but their economy is teetering with growth stagnating, which hurts New Zealand being so invested. There's also significant interference in New Zealand politics and systems." 20-24 years, female, European, Wellington

"Globally, China is expanding outside its geographic boundaries and entering into business arrangements with smaller, poorer countries on terms extremely favourable to China but not so for the other country." 30-34 years, female, European, Otago

"We do not have shared value systems. China is a socialist dictatorship and their belt and road initiative is very threatening to strategic alliances who become ingratiated to China's influence." 30-34 years, male, other ethnic heritage, Manawatu-Wanganui



New Zealanders lack confidence in China's and Russia's ability to act responsibly in the world

New Zealanders were asked to rate their trust in 10 major powers (including middle-power, Australia) to act responsibly in the world. The highest level of trust was expressed in Australia (74 percent high trust), while China (12 percent) and Russia (five percent) received the lowest trust ratings.

As in 2022, Australia is most trusted overall (74 percent high trust in 2023, compared with 72 percent in 2022) and it enjoys a strong 'very high trust' level, with 32 percent expressing very high trust (up by five percentage points from 27 percent in 2022).

The United Kingdom and Japan are the two other most highly trusted major powers, with over half of New Zealanders expressing high trust in each one (64 percent for the United Kingdom and 56 percent for Japan). Germany ranks fourth, with 49 percent expressing high trust.

Trust in the United States to act responsibly has declined by two percentage points from 40 percent to 38 percent between 2022 and 2023.

New Zealanders have little trust in Russia to act responsibly in the world, with 75 percent having only a low level of trust and nearly half (47 percent) saying they have very low trust.

Low trust also outweighs high trust for China, with 50 percent of New Zealanders expressing little trust in China to act responsibly and only 12 percent expressing high trust. Nearly one in five (19 percent) say they have 'very low trust' in China to act responsibly in the world.

Russia

"Military is aggressive and [it has] extreme points of view with little room for constructive talk. They are threatened by the United States, and so won't listen to us as we are allied with the United States." 30-34 years, male, European, Waikato

"Its continued attack on Ukraine, its interference with the [world's] food and oil resources, its threat to use nuclear weapons." 25-29 years, female, other European heritage, Auckland

Japan

"...Excellent trade ties with Japan, common security alliance ties and a shared threat from China and North Korea." 30-34 years, male, European, Otago

China

"Growing tensions in the Asia and Pacific regions due to China's military flexing." 25-29 years, male, European, Auckland

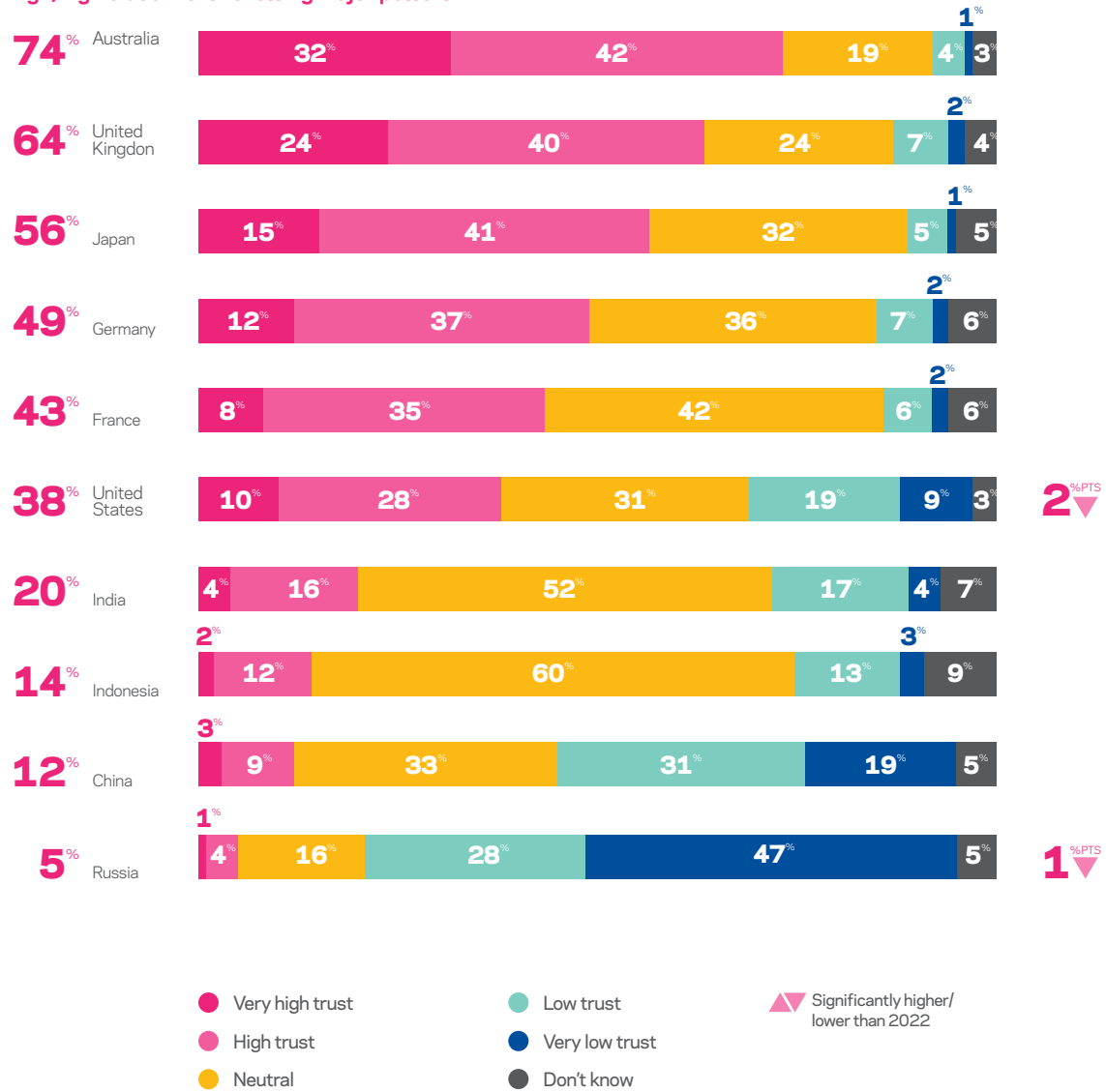
"They are growing their military and being hostile within a sea that they do not have a right to. They have also started encroaching on other countries' sea and territory." 18-19 years, male, other ethnic heritage, Auckland

"Can't be trusted, cyber terrorism, sneaky own agenda and trying to take control of Pacific nations." 30-34 years, female, other ethnic heritage, Taranaki

Figure 8

Levels of trust in major powers to act responsibly in the world

Percentage of New Zealanders who express very high/high trust in the following major powers



Source: P4 - How much trust do you have in the following major powers to act responsibly in the world?

Base: All New Zealanders - (2023) n=2,300

China is perceived to be the Asian country that has the most influence over New Zealand now and into the future, with India's influence anticipated to rise

For the first time, New Zealanders were asked which country in Asia they think has the most influence over New Zealand, both now and over the next 10-to-20 years.

China dominates perceptions, with 82 percent saying that it has the most influence over New Zealand currently and 73 percent anticipating that it will have the greatest influence over the next 10-to-20 years.

While only three percent regard India as having the greatest influence over New Zealand currently, its influence is expected to increase, with 12 percent thinking it will have the greatest influence over the next 10-to-20 years (an equivalent decline in China's perceived future influence).

Japan holds a steady position—seven percent say it has the greatest influence now, while six percent think it will have the greatest influence in the future.

A small number of New Zealanders (two percent) saw South Korea and Singapore as being the most influential now and in the future

"I feel that they (China) are the most important country on an economic, political and all-round influential basis, in the world. They are obviously a global powerhouse and leader and I think to not learn from them and try and create partnerships with them, is a mistake." 25-29 years, male, Fijian Indian heritage, Auckland

"China is such an amazing country and so incredibly influential going forward. We must treat them with caution and respect. There is probably potential for them to become the world leaders." 40-49 years, male, European, Auckland

"We have close ties in the past with India and this country needs to be our friend as the most populated developing nation. It has grown substantially as a world power over the last 20 years—and English is often the common language in many states." 40-49 years, male, European, Wellington

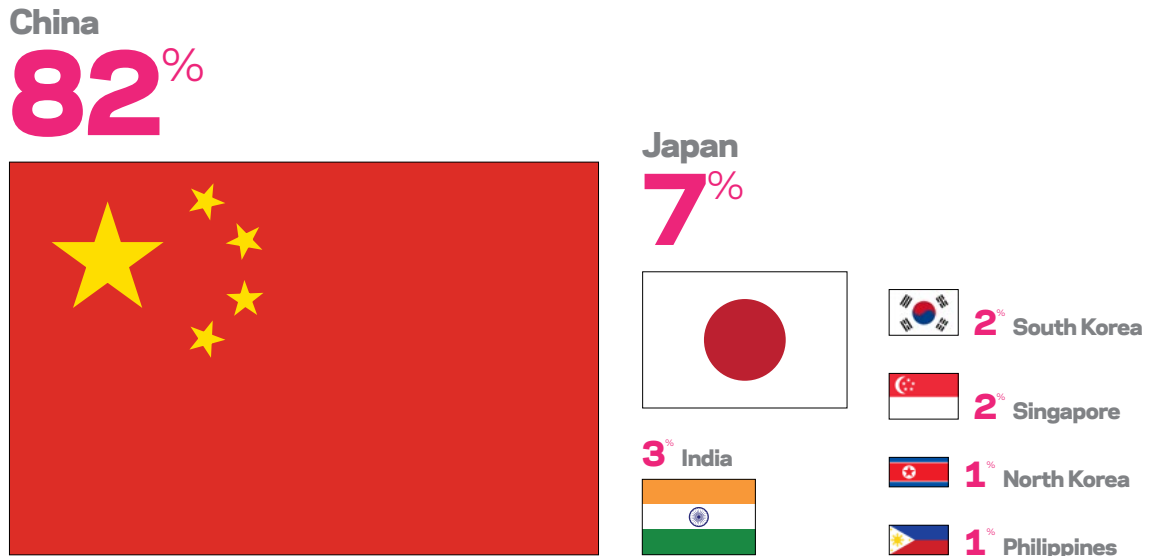
"I think of India as a friend due to how trade relations with India can help New Zealand diversify away from China. Obviously, this is a good economic decision, and as India is democratic it helps to decrease New Zealand's reliance on authoritarian countries." 18-19 years, female, European, Wellington

"The world is becoming increasingly globalised and connected, and there is increasing need to work together on issues around economy, politics and the environment, namely climate change. This affects the entire planet, not just individual countries."

20-24 years, female, New Zealand and other European heritage, Canterbury

Figure 9

Which Asian country has
the greatest influence over
New Zealand **currently**?



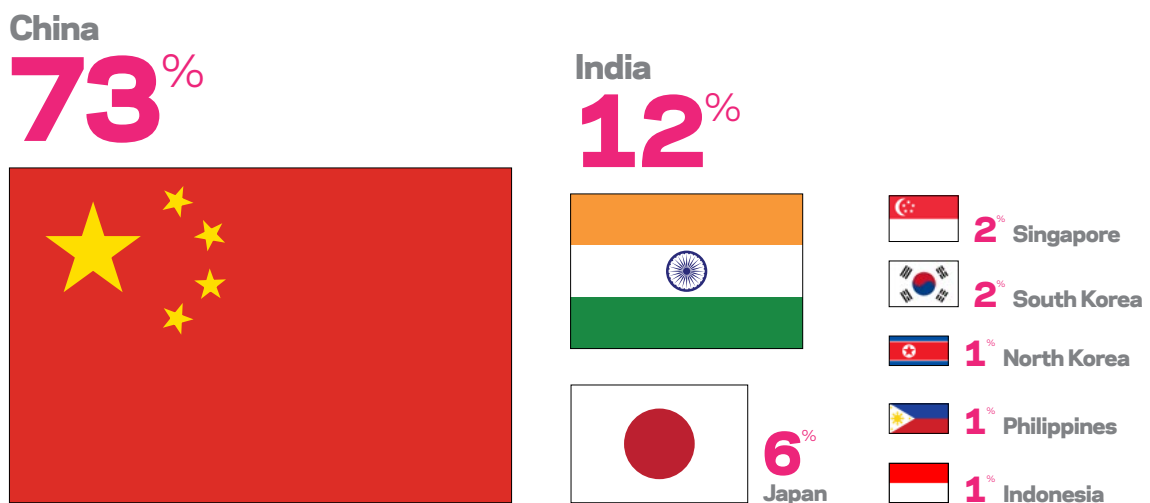
Source: P6 - Which country in Asia do you think has the most influence over New Zealand?

Base: All New Zealanders - (2023) n=2,300

Note: Countries perceived as having 0% influence not shown.

Figure 10

Which Asian country do
New Zealanders think will be the
most influential in the **future**?



Source: P7 - What country in Asia do you think will have the most influence over New Zealand over the next 10-20 years?

Base: All New Zealanders - (2023) n=2,300

Note: Countries perceived as having 0% influence not shown.

Figure 11

Why are countries seen as influential?

China



- 85%**
Size of its economy
- 56%**
Political influence
- 51%**
Cyber, AI and technological advancement

India



- 75%**
Size of its economy
- 33%**
Family and personal links
- 30%**
Cyber, AI and technological advancement

Japan



- 61%**
Size of its economy
- 43%**
Cyber, AI and technological advancement
- 29%**
Cultural and sporting influence

Singapore



- 71%**
Size of its economy
- 30%**
Cyber, AI and technological advancement
- 29%**
Political influence

South Korea



- 65%**
Size of its economy
- 43%**
Military strength
- 42%**
Cyber, AI and technological advancement

North Korea



- 71%**
Military strength
- 62%**
Political influence
- 35%**
Size of its economy

Philippines



- 44%**
Size of its economy
- 31%**
Family and personal links
- 13%**
Political influence

Indonesia



- 23%**
Size of its economy
- 17%**
Cyber, AI and technological advancement
- 12%**
Family and personal links

New Zealanders' top three reasons when asked why a country will have the most influence over New Zealand in the future

Source: PB - You mentioned [COUNTRY] will have the most influence over New Zealand over the next 10-20 years, why do you think that?

Base: All New Zealanders - (2023) n=2,300

Fake news, cyber-attacks and climate change top concerns about threats to New Zealand's vital interests

Top of mind for New Zealanders are concerns about fake news/misinformation, cyber-attacks from other countries and climate change (all 46 percent high concern). More New Zealanders are highly concerned about cyber-attacks than a global economic downturn, a reverse from 2022.

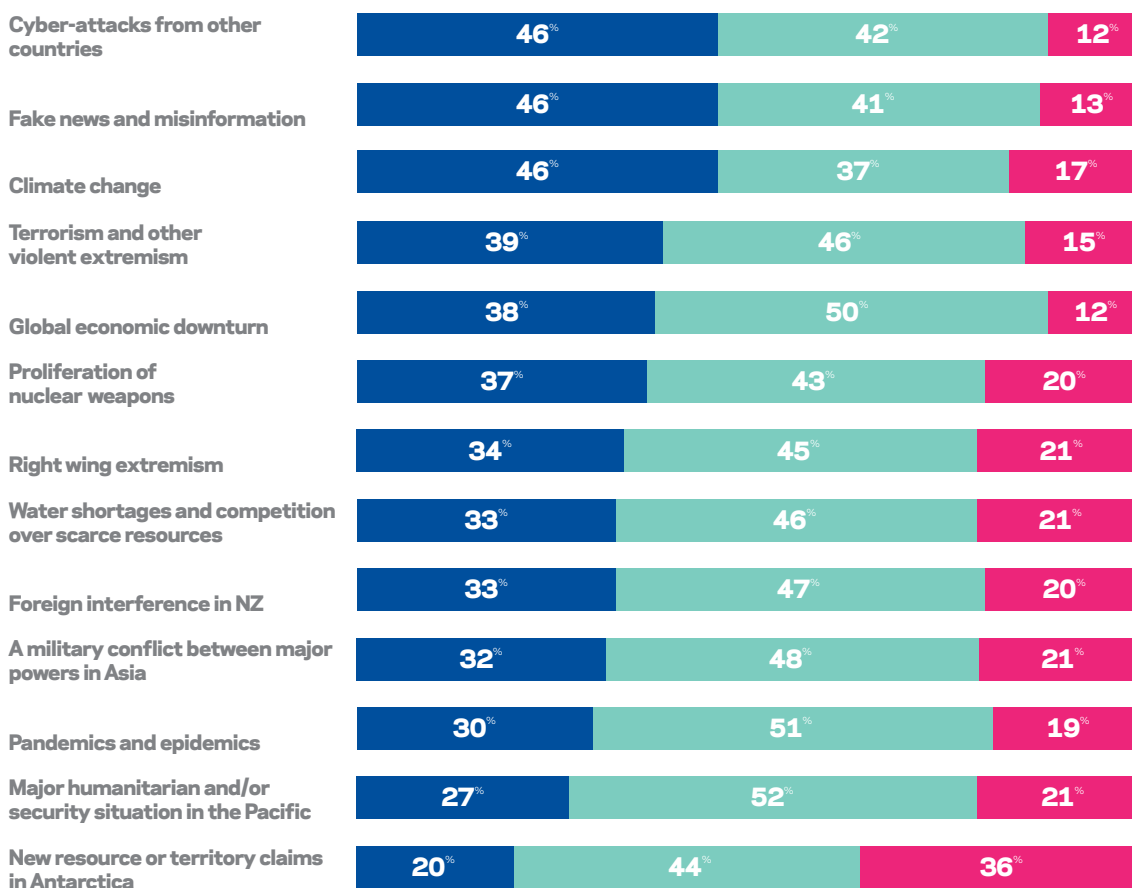
Terrorism also remains a worry, ranking in fourth position with 39 percent of New Zealanders viewing it as a high concern. Concern about a military

conflict between major powers in Asia ranks tenth at 32 percent, a similar ranking to 2022.

New resource or territory claims in Antarctica are considered the least significant threat to New Zealand in the next ten years, with 36 percent expressing low concern about this issue and only 20 percent expressing high concern.

Figure 12

Concern over potential threats to New Zealand's vital interests



● High concern (8-10) ● Low concern (0-4)
● Medium concern (5-7)

Source: P5 - How concerned, or not, are you with the following possible threats to New Zealand's vital interests over the next ten years?

Base: All New Zealanders - (2023) n=2,300

Most New Zealanders think investing energy and time into building partnerships with Asian countries is important

As in 2022, most New Zealanders said that it is at least quite important for New Zealand to invest energy and resources into building partnerships with Asian countries, and 58 percent think it is very important or important. The strength of importance expressed is slightly lower in 2023 than in 2022, although the proportion considering it unimportant has not changed.

One in four (24 percent) think it is very important for New Zealand to invest time and energy into building partnerships. Males are more likely than females to consider it very important (31 percent compared with 16 percent among females). Perceived importance increases with age: 14 percent of the under-30 age group consider it very important compared with 32 percent of the 60-plus age group.



Japan is considered New Zealand's most important defence and security partner in Asia

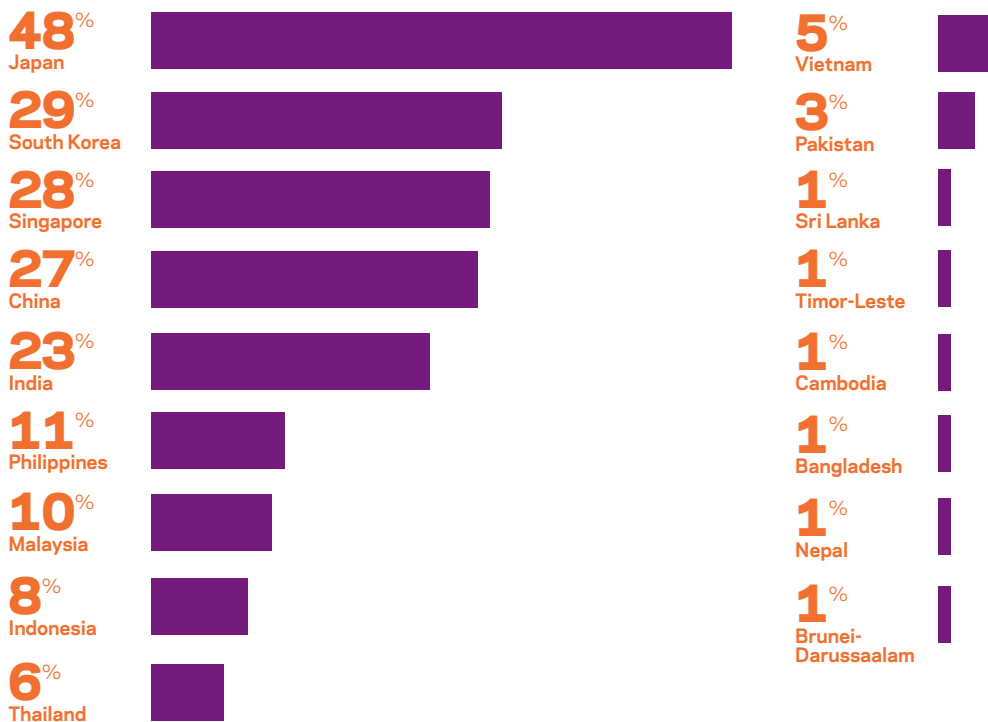
When asked which countries in Asia are New Zealand's most important defence and security partners, New Zealanders ranked Japan first (48 percent), followed by South Korea (29 percent), Singapore (28 percent) and China (27 percent).

India ranks fifth as an important Asian defence and security partner (23 percent).

The perceived importance of many Asian countries is lower in 2023 than in 2022, with Singapore showing a bigger reduction than others (by 11 percentage points, dropping from 39 percent in 2022 to 28 percent in 2023).

Figure 13

Which Asian countries do New Zealanders think are the most important partners to work with?



Source: P9 - In terms of New Zealand's defence and security, which Asian countries are New Zealand's most important partners to work with?

Base: All New Zealanders - (2023) n=2,300





2 Asia at home

<헤일로 2600>

<헤일로>(2001~현재)는 Xbox용 프랜차이즈 게임으로, 한국에서는 상대적으로 잘 알려지지 않았지만 북미 지역에서는 큰 성공을 거둔 게임이다. 최신 콘솔의 기능을 극대화하기 위해 대안적인 접근을 취한 반면, "홈브루(home-brew, 자체 제작)" 또는 "DIY(do it yourself, 저사양으로 재제작)"과 같은 또 다른 접근 방식은 엔지니어이자 게이머인 에드 프라이스가 <헤일로 2600>(2010)은 이런 "DIY(do it yourself)" 게임 제작을 보여주는 유명한 사례다.

프라이스는 집에서 프로그래밍 작업을 하던 중 1977년 Atari의 2600 비디오 컴퓨터 시스템(VCS)이라는 시대를 초월한 게임 <헤일로>의 3D 그래픽과 방대한 내러티브를 구현할 수 있었다. 하지만 프라이스는 혁신적인 접근 방식을 통해 게임 <헤일로>의 주된 테마를 재현해냈고, 이제는 쓰이지 않는 구성 요소를 불러일으키는 게임 플랫폼을 만들어냈다.

Halo

"Halo" is a franchise of Xbox, a successful series in science fiction games. It demonstrates the capabilities of game-narrative in Halo 2600 (2010) and game-narrative "do it yourself."

Program of conventional narrative in 1977 Atari's VCS but through Fries was the protagonist through obsolete

“Continent with different, exciting cuisines, great inventions and advances in all areas of life.”

What do New Zealanders know about Asia?

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

Key findings

China remains the country most closely associated with Asia.

Self-assessed knowledge levels of Asia are at their highest since 2013.

Over half of New Zealanders feel connected with Asian cultures in their daily lives despite some reduction in the number of New Zealanders who feel a strong connection.

North Asia continues to be the most well-known Asian sub-region.

Japan is the place in Asia New Zealanders feel they know best and also the place New Zealanders would most like to learn more about.

“Despite being Indian myself, I still usually imagine East Asia first. I think the first word that pops into [my] mind is China.”

18-19 years, female, Indian heritage, Auckland

China and food are the most common associations with Asia

When asked what words they associate top-of-mind with Asia, two associations dominate New Zealanders' perceptions: China and food.

China / Chinese is the most common association (for the fifth year in a row). There were references to the huge, densely populated continental landmass and mention of other well-known Asian countries, such as Singapore, Japan, India, Korea, Thailand and Malaysia.

Food is mentioned second. The associations were often specific, with comments about the deliciousness of Asian food and mention of diverse Asian foods, including rice, sushi, fried rice and street foods. Foods associated with specific countries, such as Japan and South Korea, were mentioned (for example, ramen).

Many New Zealanders spoke of Asia's influence and powerhouse status, due to the economic size and technological advances associated with particular Asian countries.

A positive sense of Asia's vibrant and rich cultural diversity also emerges. Holidays and travel are key associations with Asia for five percent of New Zealanders; they talked of Asia's natural beauty and warm climate.

A few associations are less positive, with some New Zealanders noting aspects such as over-population and extremes of wealth and poverty.

Figure 14

What words do New Zealanders
associate with Asia?



Source: K1 - When you see or hear the word "Asia", what is the first word that pops into your mind?

Base: All New Zealanders - (2023)
n=2,300

Self-assessed knowledge levels of Asia are at their highest since 2013

Self-assessed knowledge of Asia is higher than in 2022 or any previous year. In 2023, nearly six in ten New Zealanders (59 percent) say they know at least a fair amount about Asia, compared to only a third in 2013.

New Zealanders still have the highest self-assessed knowledge of Australia (89 percent), the United Kingdom (76 percent) and Europe (68 percent). However, self-assessed knowledge of Asia is climbing closer to knowledge levels for North America (63 percent) and the South Pacific (63 percent).

Knowledge of Asia is higher among males than females (69 percent compared with 49 percent). Knowledge among those aged under 30 years has increased significantly since 2013: in 2023, 56

percent of those aged under 30 years say they know at least a fair amount about Asia, up from 47 percent in 2018 and 30 percent in 2013.

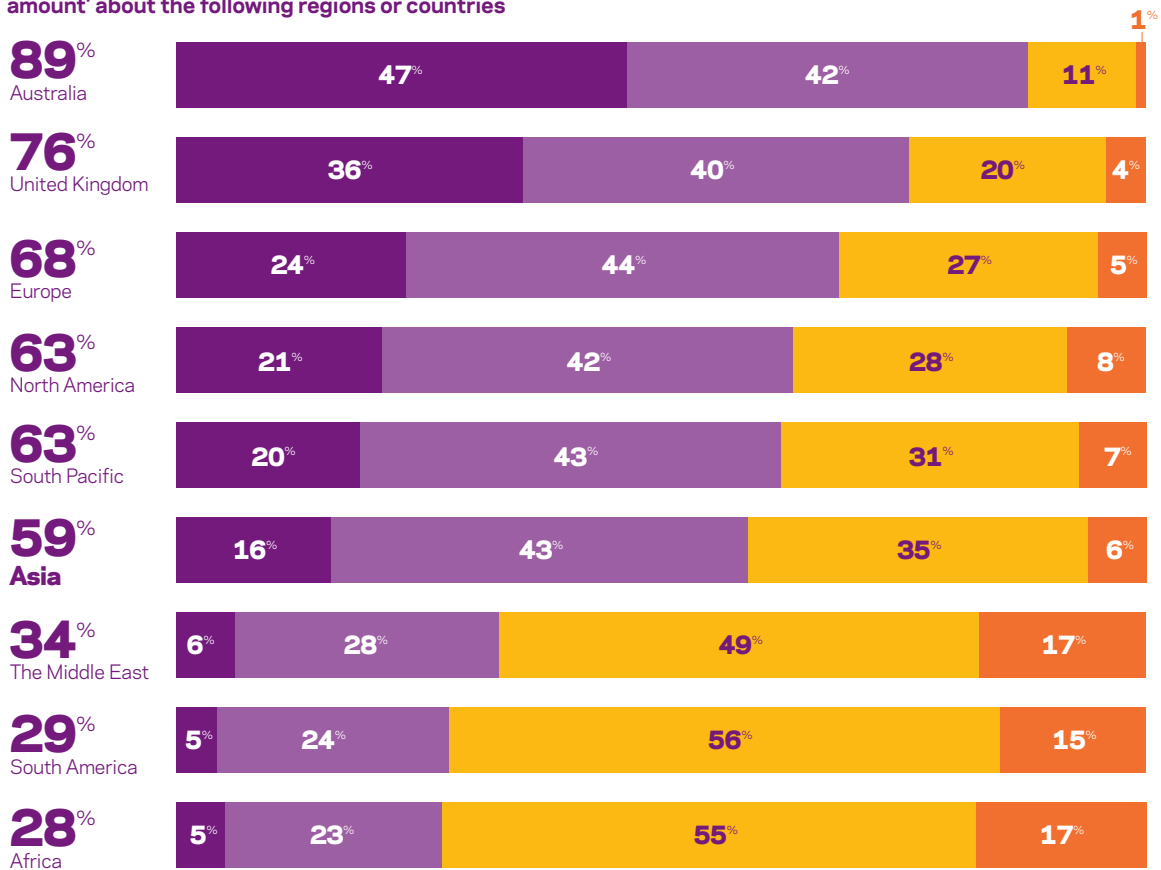
Self-assessed knowledge is highest among those of Asian heritage (87 percent knowing at least a fair amount, compared with 54 percent of non-Asian New Zealanders).

Knowledge is greatest among those living in big cities (66 percent) and significantly lower among New Zealanders living in small towns (52 percent) or rurally (43 percent).

Figure 15

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

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

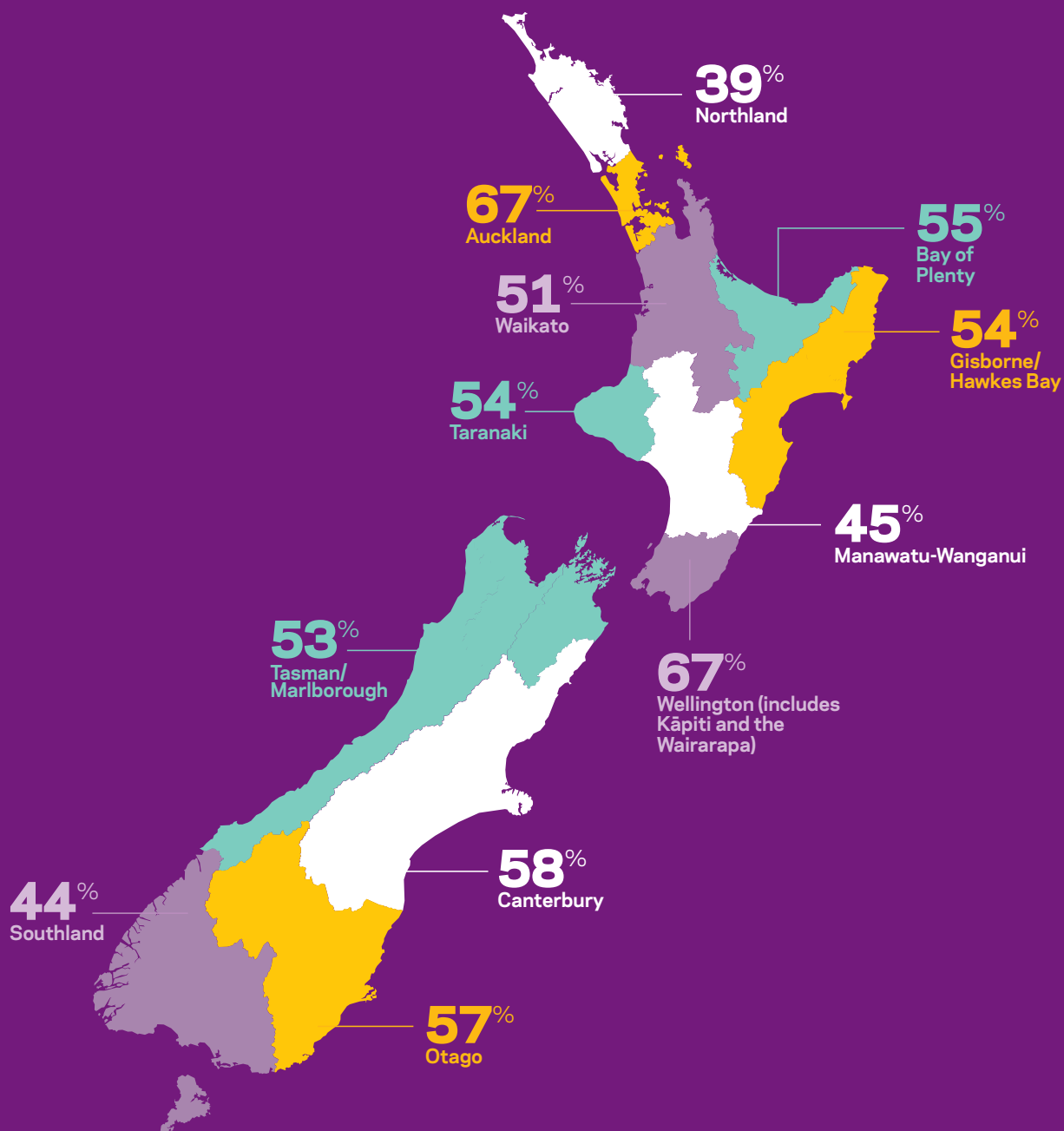


● A lot ● A little
● A fair amount ● Almost nothing

Source: K5 - How much do you feel you know about the following regions?
 Base: All New Zealanders excluding 'don't know' - (2023) Australian n=2,280; United Kingdom n=2,274; Europe n=2,277; North America n=2,271; South Pacific n=2,271; Asia n=2,274; The Middle East n=2,269; South America n=2,267; Africa n=2,261

Figure 16

Which regions in New Zealand rate their Asia knowledge the highest?



Source: K5 - How much do you feel you know about the following regions?

Base: All New Zealanders - (2023) n=2,300

North Asia continues to be the most well-known Asia sub-region

New Zealanders continue to have stronger self-assessed knowledge of North Asia than of Southeast Asia or South Asia. Just over half (53 percent) say they know at least a fair amount about North Asia, compared with 39 percent knowing at least a fair amount about Southeast Asia and 30 percent knowing at least a fair amount about South Asia.

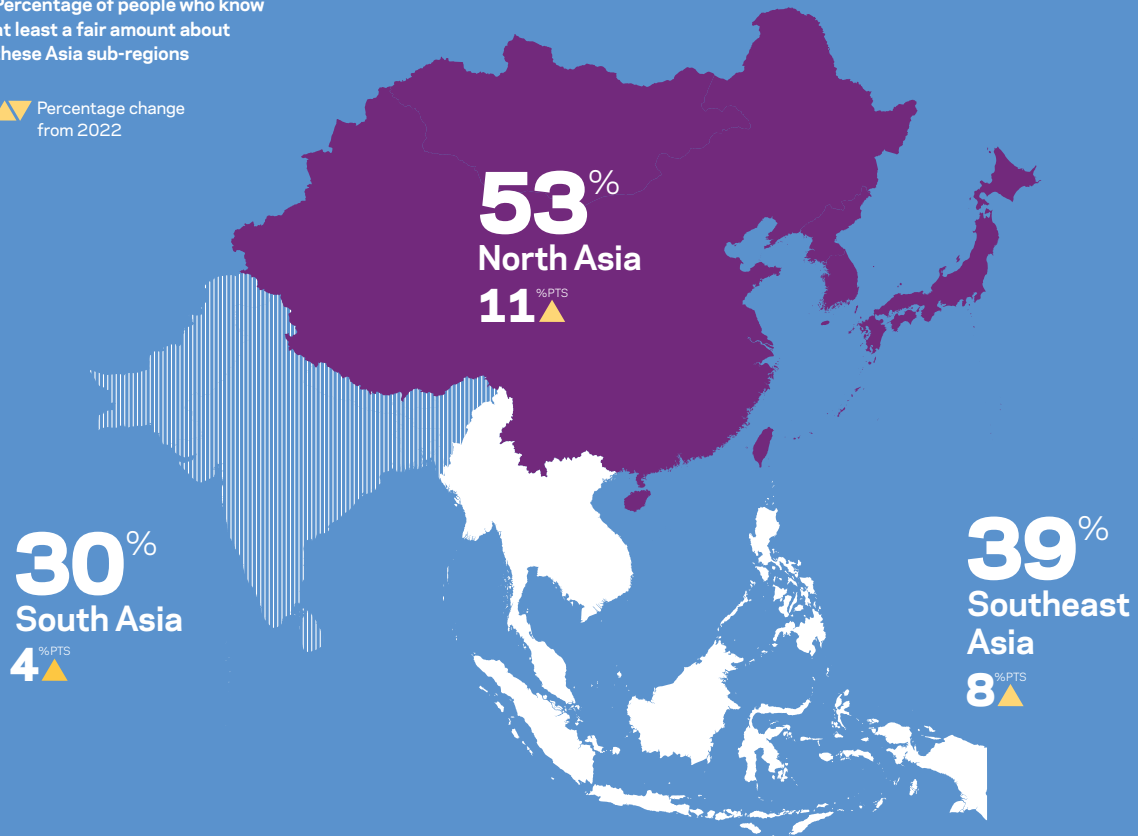
Self-assessed knowledge levels of Asia's sub-regions are consistent across the age groups and gender, with males expressing higher levels of knowledge than females for each Asian sub-region.

Figure 17

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

Percentage of people who know at least a fair amount about these Asia sub-regions

▲ Percentage change from 2022



Source: K6 - And about the following (Asian) regions?

Base: All New Zealanders - (2023) n=2,300

Japan is the place in Asia that New Zealanders know best

New Zealanders were asked which one place in Asia they feel they know most about. (This question was new in 2023.)

Japan is best known (29 percent list Japan first), despite not being the most frequently visited Asian country (Japan ranked fifth for visit levels, with 32 percent of those who have travelled to Asia having visited Japan).

China is second best known, mentioned by 20 percent. China ranked fourth in visitation levels, with 33 percent of those who have visited Asia having travelled to China.

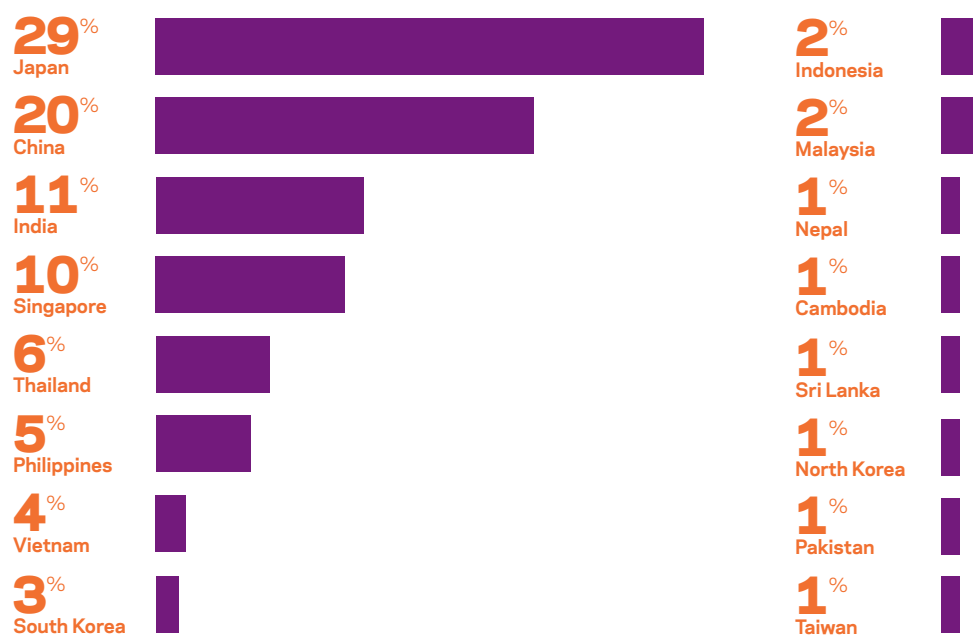
India and Singapore were mentioned third and fourth, with around one in ten New Zealanders saying they know the most about each of these countries.

Other places ranking in the top ten most well-known are mainly Southeast Asian countries, including Thailand, the Philippines, Vietnam, Indonesia and Malaysia.

There are few differences in perceived knowledge of Asian places by age or gender. However, males are more likely than females to say they know Singapore best (13 percent compared with seven percent) and the likelihood of naming Singapore as their best-known Asian country also increases with age. This likely reflects New Zealanders' work-related travel patterns.

Figure 18

Which place in Asia do New Zealanders know best?



Source: A2 - Which one place in Asia do you feel you know the most about? (New question in 2023)

Base: All New Zealanders - (2023) n=2,300

Note: Countries with 0% not shown

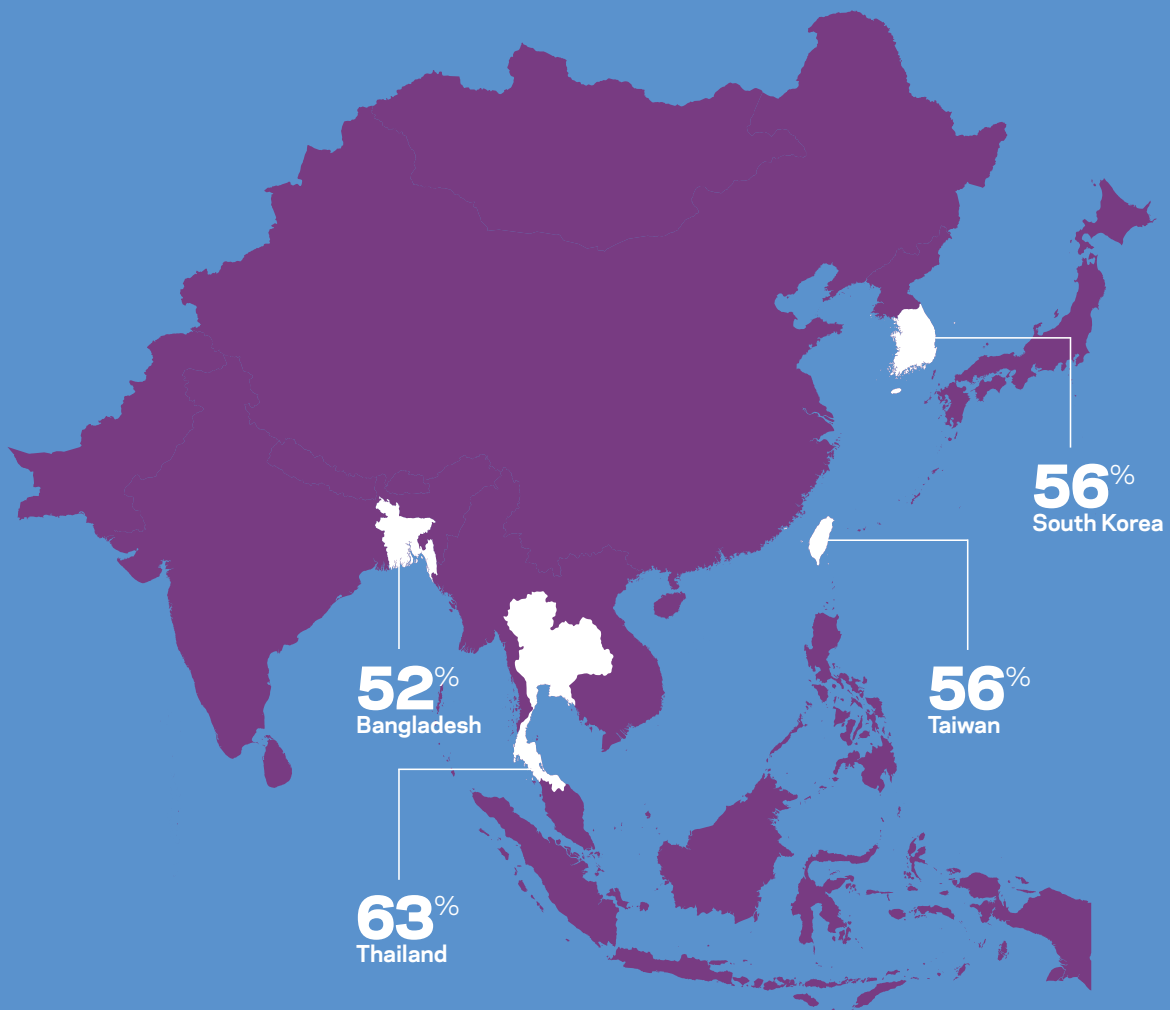
How good are New Zealanders at identifying Asian places on a map?

We also put New Zealanders to the test by asking them to identify four places highlighted on a map of Asia. These places were: Bangladesh, South Korea, Taiwan and Thailand. Thailand was the place New Zealanders were able to correctly identify most frequently, with 63 percent correctly locating it,

followed by Taiwan and Thailand (56 percent correct respectively). Bangladesh proved to be the place New Zealanders had the most trouble identifying, (52 percent)

Figure 19

Percentage of New Zealanders who can correctly identify the following locations on a map



Source: Q1 - Locations on a map

Base: All New Zealanders - (2023) n=2,300

Friends and family are key sources of information

Friends and family are typically the key source of information for the places New Zealanders know most about. However, visiting the country is the key source of knowledge for Thailand, Vietnam and Indonesia.

Media (newspapers and magazines) are important sources also, particularly for Japan, China and India.

The top three ways of learning about each country are summarised below.

Figure 20

Where do New Zealanders get most of their Asia knowledge from?

Japan



- 46%**
From friends or family
- 41%**
Learnt about at school or university
- 38%**
Studied or learnt on my own (e.g. in newspapers, magazines)

China



- 36%**
From friends or family
- 36%**
Studied or learnt on my own (e.g. in newspapers, magazines)
- 24%**
Learnt about at school or university

India



- 39%**
From friends or family
- 31%**
Studied or learnt on my own (e.g. in newspapers, magazines)
- 29%**
I have visited

Singapore



- 72%**
I have visited
- 28%**
From friends or family
- 17%**
Studied or learnt on my own (e.g. in newspapers, magazines)

Thailand



- 65%**
I have visited
- 37%**
From friends or family
- 9%**
I have lived there

Philippines



- 49%**
From friends or family
- 32%**
I have lived there
- 20%**
I have visited

Vietnam



- 60%**
I have visited
- 28%**
From friends or family
- 24%**
Studied or learnt on my own (e.g. in newspapers, magazines)

South Korea



- 46%**
Studied or learnt on my own (e.g. in newspapers, magazines)
- 44%**
From friends or family
- 31%**
Other, please specify

Indonesia



- 65%**
I have visited
- 36%**
From friends or family
- 16%**
Studied or learnt on my own (e.g. in newspapers, magazines)

Malaysia



- 42%**
From friends or family
- 37%**
I have lived there
- 34%**
I have visited

Source: A3 - And where did you learn about this place? (New question in 2023)

Base: All New Zealanders - (2023) n=2,300

Japan is the place New Zealanders would most like to learn more about

As well as being the most well-known place in Asia, Japan is the place New Zealanders would most like to learn more about (21 percent). Interest in learning more about Japan is strongest among the 25 to 39 age group (25 percent).

China and India rank a distant second and third, with nine percent wanting to learn more about China and eight percent about India.

Six percent would like to learn more about South Korea, Vietnam and/or Singapore.

There are gender and ethnic heritage differences in interest levels. Males express greater interest than females in learning more about China (11 percent of males and six percent of females) and India (10 percent of males and five percent of females).

Those of Asian heritage are more interested than those of non-Asian heritage in learning about Japan (28 percent compared with 20 percent of non-Asian heritage), China (14 percent compared with eight percent of non-Asian heritage) and South Korea (12 percent compared with five percent of non-Asian heritage).



Figure 21

What place would New Zealanders like to learn more about?



Source: A4 - Which place would you most like to learn more about? (New question in 2023)

Base: All New Zealanders - (2023) n=2,300

Note: Countries with 0% not shown.

Interest in different cultures, their history and their people are key reasons for wanting to learn more

New Zealanders have diverse reasons for wanting to learn more about Asia. The main themes include culture (25 percent), general interest (13 percent), history (nine percent), people (five percent) and cuisine (five percent).

Figure 22

Reasons for wanting to learn more about Asian countries



Source: A5 - You mentioned that [COUNTRY] is the place you most like to learn about, why is this? (New question in 2023)

Base: All New Zealanders - (2023) n=2,300

Figure 23

Top reasons for wanting to learn more about places in Asia

Japan



43%
Culture

18%
Fascinating/interesting/
nice place

16%
Want to visit, live or work
there

China



17%
Powerhouse

14%
Culture

14%
Economy

India



37%
Culture

20%
Huge, vast country

12%
Growing/fast-developing
nation

South Korea



27%
Culture

12%
Fascinating/interesting/
nice place

12%
Technology

Vietnam



28%
History

21%
Want to visit, live or work
there

16%
Culture

Singapore



17%
Fascinating/interesting/
nice place

12%
Want to visit, live or work
there

9%
Economy/Culture

Thailand



24%
Culture

24%
Want to visit, live or work
there

17%
Fascinating/interesting/
nice place

Maldives



27%
Beautiful country

14%
Want to visit, live or work
there

14%
Fascinating/interesting/
nice place

Philippines



39%
Have met people from there

16%
Culture

11%
Connections/links in
general

Source: A5 - A5 - You mentioned that [COUNTRY] is the place you most like to learn about, why is this? (New question in 2023)

Base: New Zealanders who wanted to learn more about a place - (2023) n=2,004

The Philippines

“It looks like a beautiful place and I don’t think we hear a lot about Filipino culture or food, despite there being a lot of Filipinos in New Zealand.”

25-29 years, female, European, Auckland

Japan

“My granddaughter attends a Japanese university where she is majoring in the Japanese language with a goal of living and working in Japan once she has attained her degree. I am impressed with the politeness of the Japanese people that I’ve met and their country looks attractive and affluent.”

40-49 years, female, European, Manawatu-Wanganui

India

“They have a growing economy and we have many more Indian people migrating to New Zealand. I see a big future in trade with India which New Zealand should embrace and develop more trade opportunities between our two countries. I do know that our government has been trying to establish a free trade agreement with India—if that is successful, I feel sure our total reliance on China as a trading partner will become less important.”

40-49 years, male, European, Wellington

Connection with Asian cultures

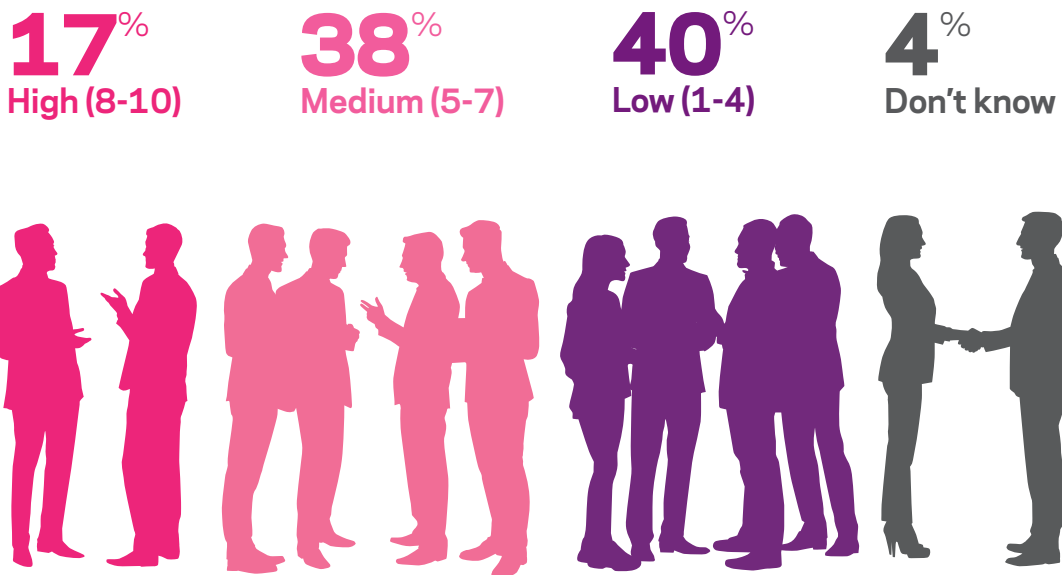
Over half of New Zealanders feel connected with Asian cultures in their daily lives despite some reduction from previous years

Despite New Zealanders' self-assessed knowledge of Asian countries being higher than in previous years, their sense of connection with Asian cultures in their daily life has reduced. In 2023, only 17 percent feel a strong connection with Asian cultures in their daily life, compared with 22 percent in 2022, 21 percent in 2021 and 26 percent in 2020 (the first year in which this question was asked). In 2023, 13 percent say they do not feel at all connected, compared with six percent feeling this way in 2022*.

The sense of daily connection with Asian cultures is greatest among those of Asian heritage (55 percent having a strong connection) and among those who have travelled to Asia for family-related reasons (52 percent). Those who have travelled to Asia have a stronger sense of connection than those who have not (23 percent compared with nine percent) and those who are aware of any media about Asia also have a stronger sense of connection (24 percent compared with 12 percent who are not aware of Asian-related media content).

Figure 24

Strength of connection with Asian cultures in daily life



Source: A1 – Looking back over the past five years, how connected have you felt, in your daily life, with Asian cultures?

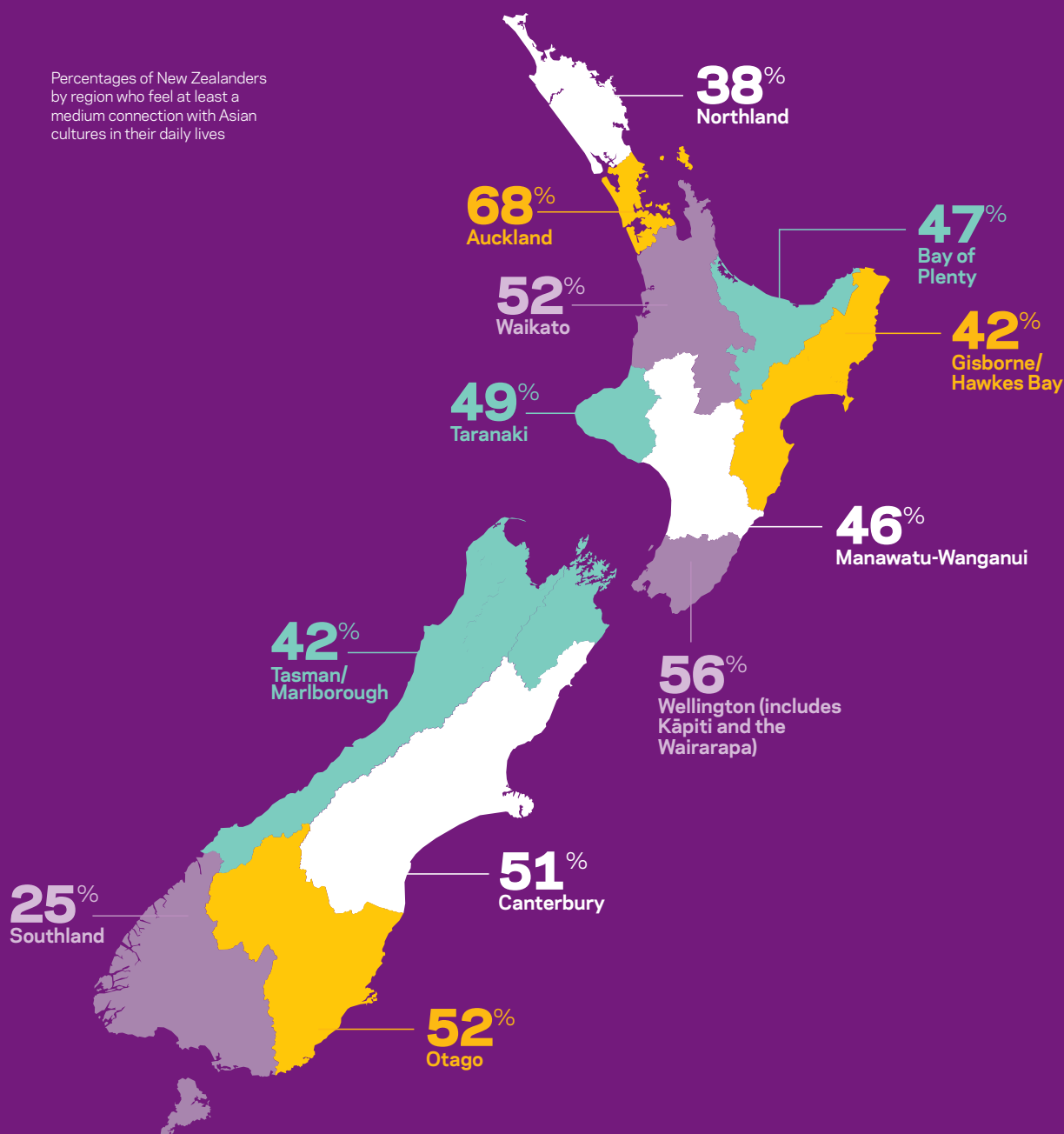
Base: All New Zealanders - (2023) n=2,300, (2022) n=2,323

* Note: The question wording was updated in 2023. The wording in previous years was: "Looking back over the past five years, how connected have you felt, in your daily life with Asian cultures, places or people who identify as Asian?"

Figure 25


Which regions are most connected with Asian cultures in daily life?

Percentages of New Zealanders by region who feel at least a medium connection with Asian cultures in their daily lives



Source: A1 – Looking back over the past five years, how connected have you felt, in your daily life, with Asian cultures?

Base: All New Zealanders - (2023) n=2,300



“New Zealand is a multicultural nation with people of different Asian ethnicities. The number of Asian immigrants has increased the past few years and I believe it will continue to do so. New Zealand need[s] to continue to develop ties. Having good trade deals with the countries may also help strengthen the economy.”

18-19 years, female, European, Northland

How will Asia impact New Zealand in the future?

This section examines how Asia will impact New Zealand in the future and how New Zealanders view those impacts.

Key findings

New Zealanders anticipate positive impacts from tourism, technology and economic growth in Asia.

Asia's potential environmental impact is an ongoing concern for New Zealanders.

New Zealanders are feeling less positive about the impact of immigration from Asia in 2023 compared with 2022.

“My home country is located in that continent. It represents my people as well as my neighbour[ing] people such as Korea, China, Japan, Thailand, Cambodia, Singapore, etc.”

18-19 years, female, Southeast Asian heritage, West Coast

New Zealanders anticipate tourism, technology and economic growth in Asia will have positive impacts for New Zealand

New Zealanders were asked about the potential impacts they think nine issues will have on New Zealand over the next 10-to-20 years.

Tourism and technology flows: These two areas are expected to have the greatest positive impact. Just over eight in ten New Zealanders (81 percent) consider tourism will have a positive impact on New Zealand, a consistent finding over the last 10 years. Seventy-six percent anticipate positive impacts from technology and innovation in Asia.

Economic growth and investment from Asia: Around two in three New Zealanders expect positive impacts from economic growth. Sixty-eight percent consider Asia's economic growth will have a positive impact, while 64 percent anticipate positive impacts from investment from Asia into New Zealand.

Immigration and cultural flows: Views of the impacts of immigration from Asia to New Zealand are less favourable than in 2022, with only half (52 percent) anticipating positive impacts and nearly one in five (19 percent) considering impacts will be negative. Views of cultural flows (Asian culture, language and traditions) are similar to 2022, with half (52 percent) anticipating positive impacts.

Political and security situation: The proportion of New Zealanders expecting the political and security situation in Asia to have positive impacts for New Zealand has reduced from 40 percent in 2022 to 37 percent in 2023. One in four (24 percent) anticipate negative impacts.

Environmental issues: In 2023, negative perceptions of the impacts of environmental issues in Asia continue to outweigh positive impacts: 36 percent of New Zealanders anticipate negative impacts from environmental issues in Asia while only 30 percent anticipate positive impacts.

“Building infrastructure in New Zealand is very expensive. Asian countries build infrastructure fast and cheap. We can learn from them.”

18 to 19 years, male, Chinese, Auckland

Figure 26

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



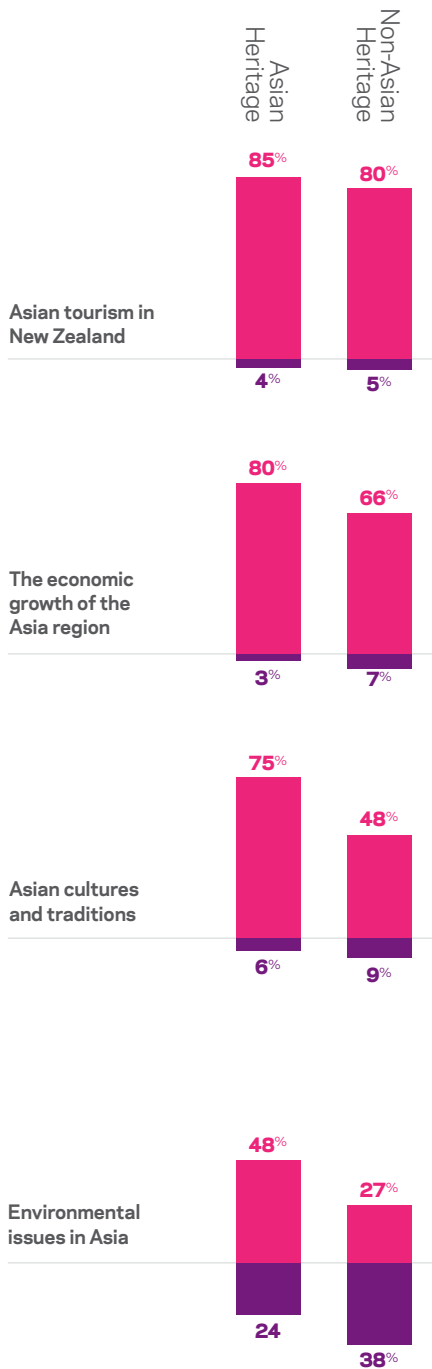
Source: K10 - What kind of impact do you think each of the following will have on New Zealand's future, in the next 10-20 years?

Base: All New Zealanders - (2023) n=2,300, (2022) n=2,323, (2021) n=2,334, (2020) n=2,001, (2019) n=2,002

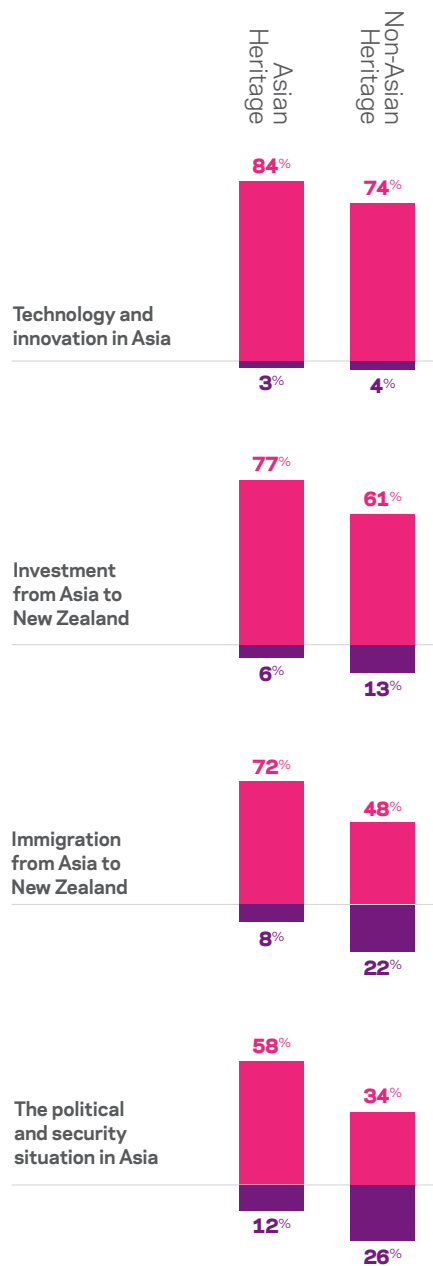
Comparison of responses reveals significantly more positive views of the future impact of each issue among New Zealanders of Asian versus non-Asian heritage. Those of Asian heritage have particularly positive opinions when it comes to the likely impact of Asian cultures, immigration and the political

and security situation in Asia, with a greater than 20 percentage point difference between the two groups.

Figure 27



How do New Zealanders of Asian and non-Asian heritage view Asia's impact on New Zealand over the next 10-to-20 years?



- Positive impact
- Negative impact

Source: K10 - What kind of impact do you think each of the following will have on New Zealand's future, in the next 10-20 years?

Base: Asian Heritage - (2023) n=366, Non-Asian Heritage - (2023) n=1,934



“Developing reciprocal friendships that benefit each nation, to the point where our nations can respectfully disagree and learn about our differences in a way that encourages positive change.”

25 to 29 years, male, Japanese heritage, Gisborne

How does New Zealand continue to **build connections with Asia?**

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

Key findings

New Zealanders support a range of activities to help grow relationships with Asia.

Understanding Asian cultural protocols is highly important for our future workforce.

Food and travel to Asia continue to be of high interest.

Experiencing Asia firsthand through travel is New Zealanders' preferred way of learning more about Asia, noting that six in ten have travelled to Asia at some time in the past.

While Southeast Asian destinations are popular, New Zealanders are interested in visiting other countries too. Japan is of greatest interest as an Asian travel destination.

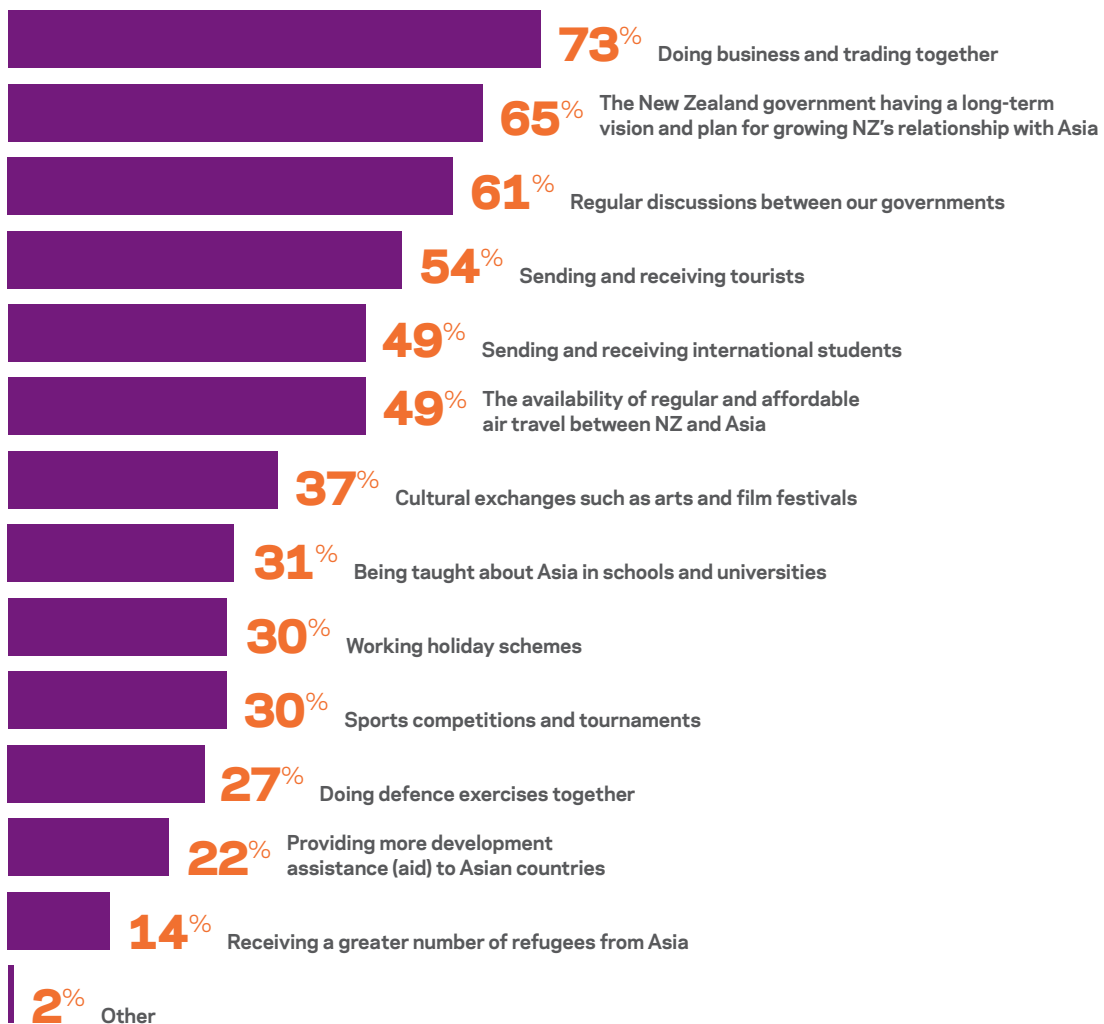
Trade and doing business together, along with government initiatives, top the list for growing New Zealand's relationship with Asia

New Zealanders were asked about the importance of 13 activities for growing New Zealand's relationship with Asia.

Figure 28

Ways to grow New Zealand's relationship with Asia

Percentage of people who felt an activity was important



Source: P10 - Which of these activities do you think are important to help grow New Zealand's relationship with Asia? Please select all that apply.

Base: All New Zealanders - (2023) n=2,300

Understanding Asian cultural protocols is highly important for our future workforce

Five aspects of cultural competency are considered important for New Zealand's future workforce and New Zealanders' career paths.

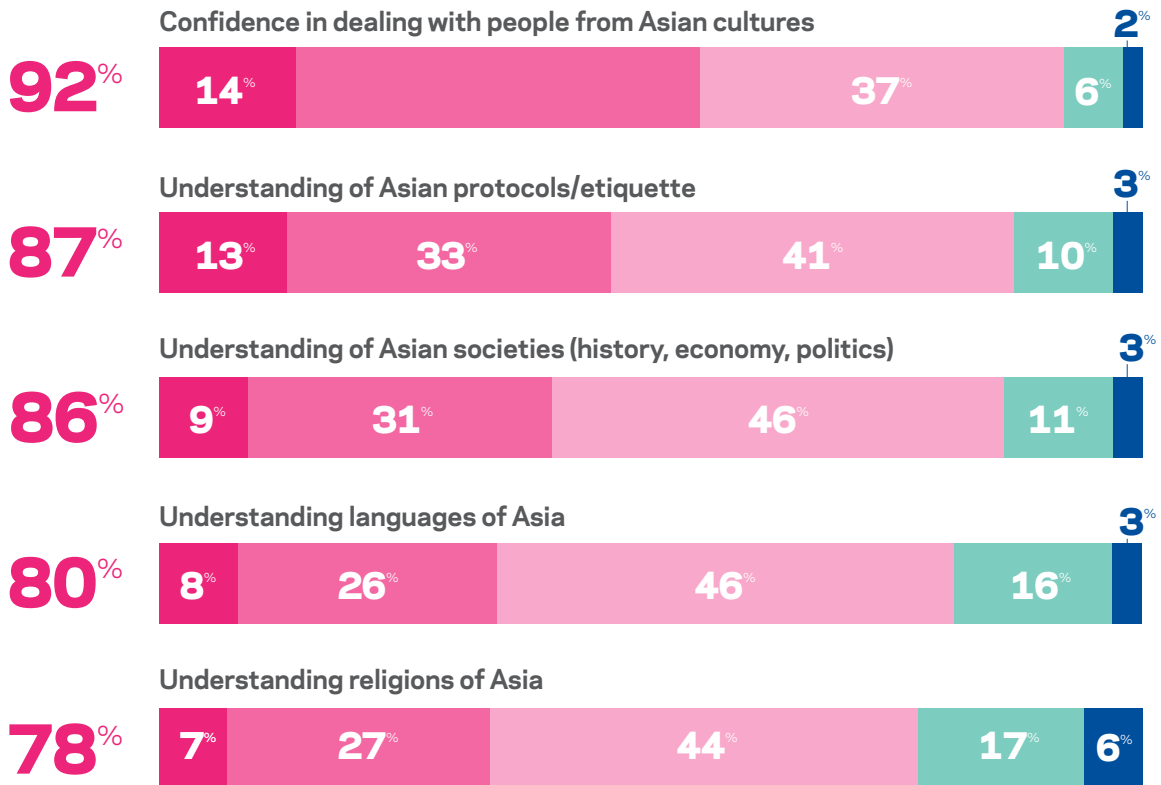
There has been no change in the perceived importance of understanding Asian cultural protocols since 2022.

Confidence in dealing with people of Asian cultures is considered to be most important, with over half of New Zealanders (55 percent) rating it as important or very important. Understanding Asian protocols and etiquette is considered second most important, with nearly half of New Zealanders (46 percent) rating it as important or very important. Approximately one in three New Zealanders (34 percent) rate understanding the languages of Asia and religions of Asia as important or very important.

Figure 29

How important is Asian cultural competency for our future workforce?

Percentage of people who thought it was at least somewhat important



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

Source: A7 - How important are the following Asia-related skills for our future workforce and the career path of New Zealanders?

Base: All New Zealanders - (2023) n=2,300

Food and travel top New Zealanders' Asia-related interests

Food and travel continue to be New Zealanders' top Asia-related interests, with over eight in ten expressing at least some interest in each of these. Nine in ten (90 percent) are most interested in food and cuisine from Asia, while 82 percent are interested in tourism and travel. Interest in both these areas has increased since 2022, with an increase of four percentage points in travel/tourism (from 78 percent in 2022), which likely reflects the world moving on from the COVID-19 pandemic.

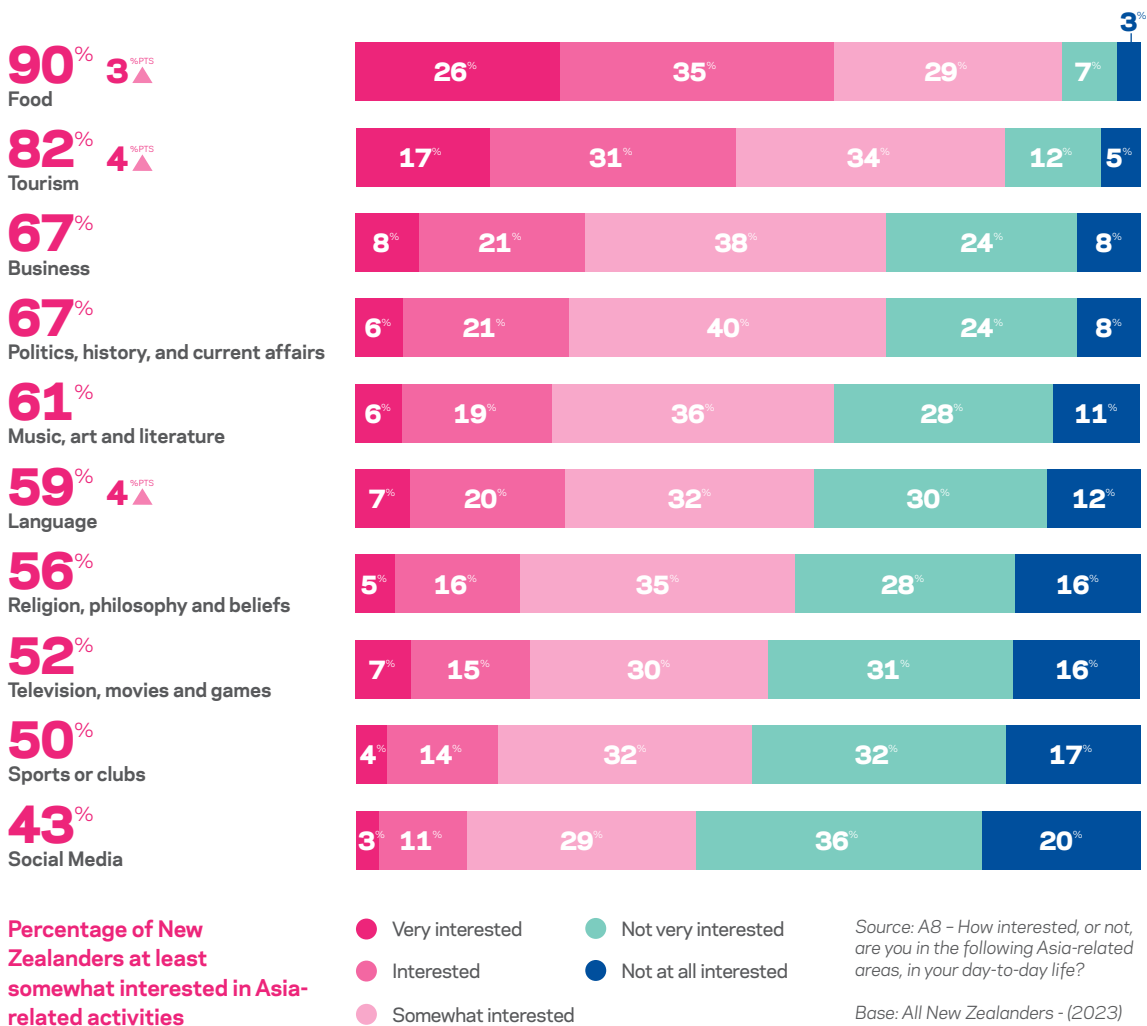
A second-level tier of interest includes business, current affairs and cultural activities: 67 percent express interest in business and trade and/or politics, history and current affairs, while 61 percent are interested in music, art and literature. There are gender-related differences: males express greater interest in business and current affairs-related activities than females do, consistent with other findings throughout the survey.

New Zealanders also express interest in a third tier of activities: 59 percent express interest in Asian languages, an increase of four percentage points compared with 2022. Fifty-six percent are interested in the area of religion and philosophy, 52 percent in television and movies, and 50 percent in sports. Interest is lowest in Asian-related social media, with just over four in ten (43 percent) expressing some interest.

Those of Asian heritage have a stronger interest in each activity compared to New Zealanders of other ethnic backgrounds, ranging from very high interest levels in Asian cuisine (97 percent), tourism (95 percent), and business and trade (88 percent), to 77 percent interest in Asian-related social media and 75 percent interest in Asian-related sports activities.

Figure 30

What Asia-related activities are New Zealanders most interested in?



Travelling to Asia is the preferred way of learning more about Asia

Most New Zealanders are open to learning more about Asia, with over nine in ten (91 percent) expressing interest in at least one of the nominated ways of learning more.

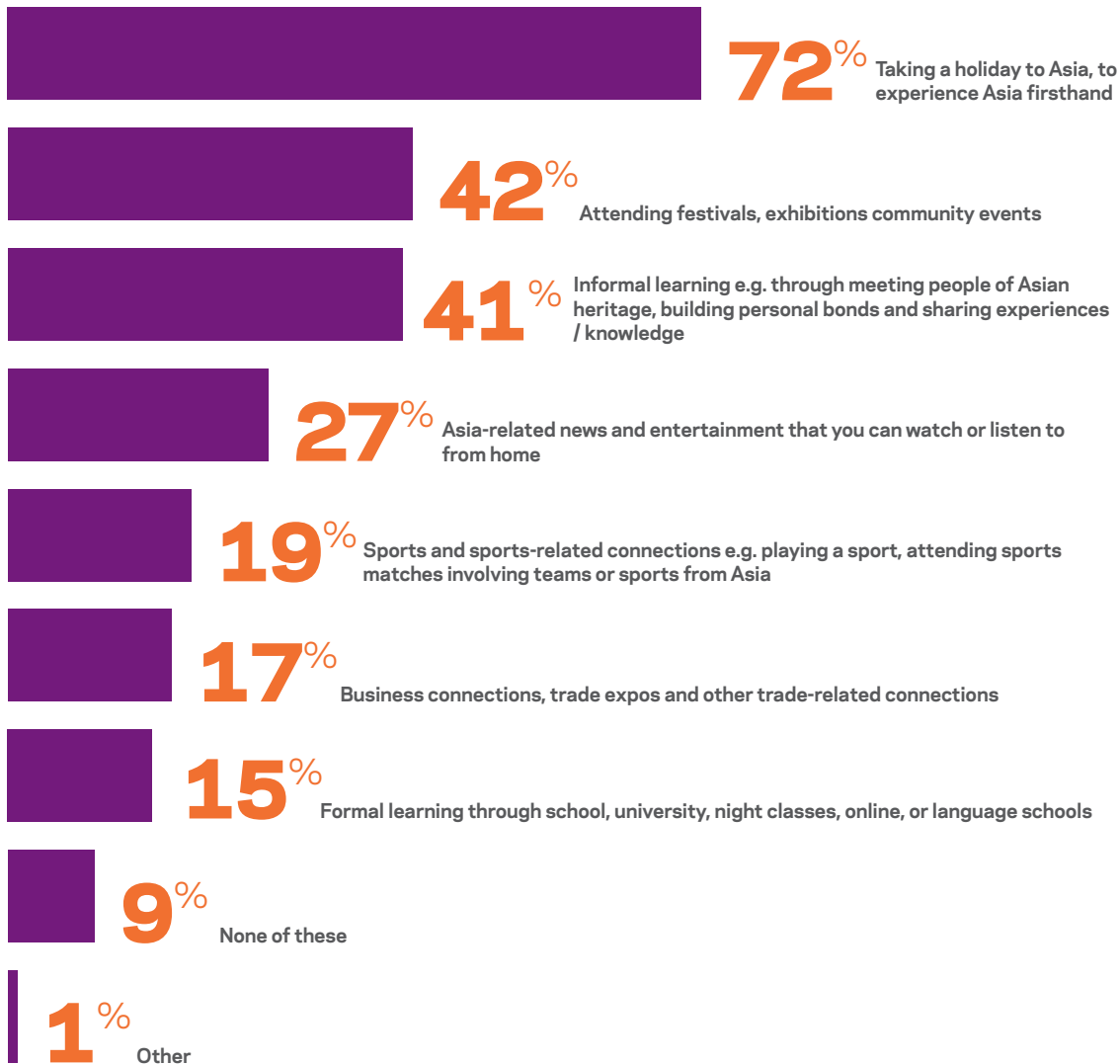
Experiencing Asia firsthand via travel is the preferred way for learning more about Asia, with 72 percent ranking it number one. Attending festivals, community events or exhibitions and informal learning through meeting people of Asian

heritage rank second and third, with four in ten New Zealanders mentioning each one.

Those of Asian heritage express stronger interest in each of the nominated ways. For example, over half (55 percent) express interest in attending festivals, exhibitions and community events, one in three (33 percent) mention business and trade connections and almost one in three (31 percent) mention formal learning channels.

Figure 31

How do New Zealanders want to learn more about Asia?



Source: T1 - Through which of the following ways would you be interested in learning more about Asia? (New question in 2023)

Base: All New Zealanders - (2023) n=2,300

Six in ten New Zealanders have travelled to Asia, primarily for holidays

Nearly six in ten New Zealanders (58 percent) said they have travelled to Asia. Holiday-related travel is the main reason for travelling to Asia, with nearly nine in ten (87 percent) having done so.

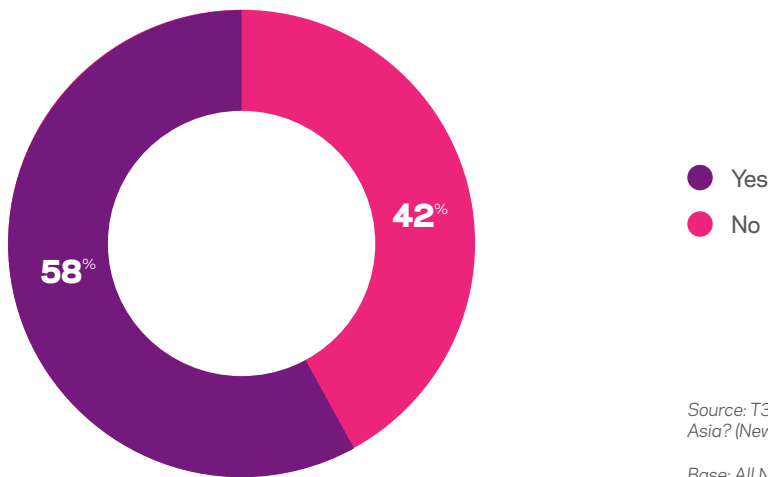
Unsurprisingly, the likelihood of having travelled to Asia increases with age: 43 percent of those aged under 30 have travelled to Asia, compared with 69 percent of those over 60 years. Males are more likely than females to have done so (68 percent compared with 49 percent of females). This reflects

a greater incidence of travelling to Asia for work among males (26 percent), compared with females (11 percent).

The vast majority of New Zealanders of Asian heritage have travelled to Asia (87 percent), compared with 53 percent of non-Asian heritage. Travel to visit family is a significant reason for travel among those of Asian heritage (69 percent), while 81 percent have travelled to Asia for holidays.

Figure 32

What percentage of New Zealanders have travelled to Asia?



Source: T3 - Have you ever travelled to Asia? (New question in 2023)

Base: All New Zealanders - (2023) n=2,300

Figure 33

Reasons for travelling to Asia



Source: T5 - For what reasons have you travelled to Asia? (New question in 2023)

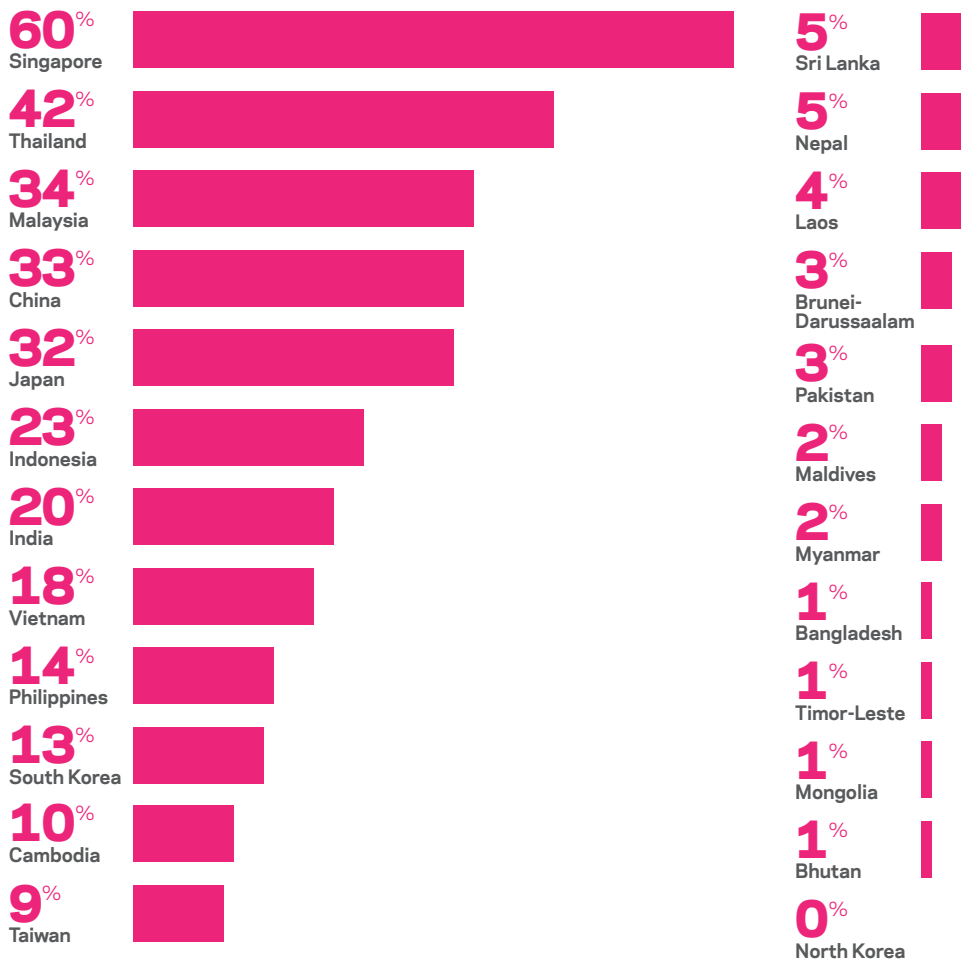
Base: Have travelled to Asia - (2023) n=1,415

While Southeast Asia is a popular travel destination, there is interest in visiting other places

Southeast Asian countries top the list for most popular Asian travel destinations: Singapore (60 percent) and Thailand (42 percent). Around a third of those who have travelled to Asia have visited Malaysia, China or Japan.

Figure 34

Asian places visited or lived in



Source: T4 - Which of the following places have you ever visited or lived in? Please note, you must have left the airport and entered the country for a visit or to stay. (New question in 2023)

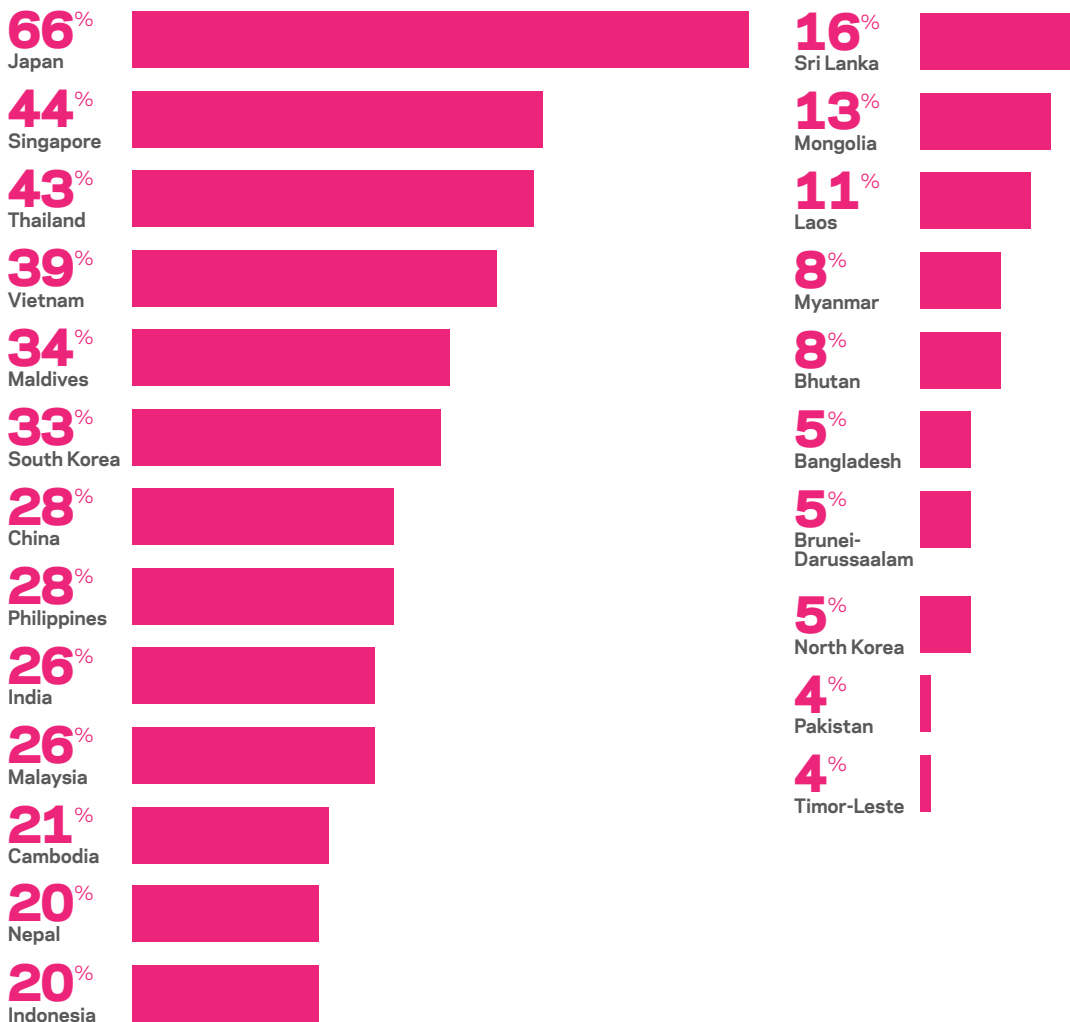
Base: Base: Have travelled to Asia - (2023)
n=1,415

Japan is the place New Zealanders are most interested in visiting

Japan is of greatest interest as a potential travel destination, with two in three New Zealanders (66 percent) expressing interest in visiting. Singapore and Thailand are also of interest to just over four in ten New Zealanders.

Figure 35

Which places in Asia do New Zealanders most want to visit?



Source: T6 - Which of the following countries would you like to visit? (New question in 2023)

Base: All New Zealanders - (2023) n=2,300

Those of Māori heritage see opportunities for Māori in Asia

New Zealanders of Māori heritage were asked about their interest in and connection with Asia in a series of agree-disagree statements.

Agreement is highest with the statement that young Māori are much more interested in Asia than previous generations, with nearly half of Māori (48 percent) agreeing, and 16 percent disagreeing.

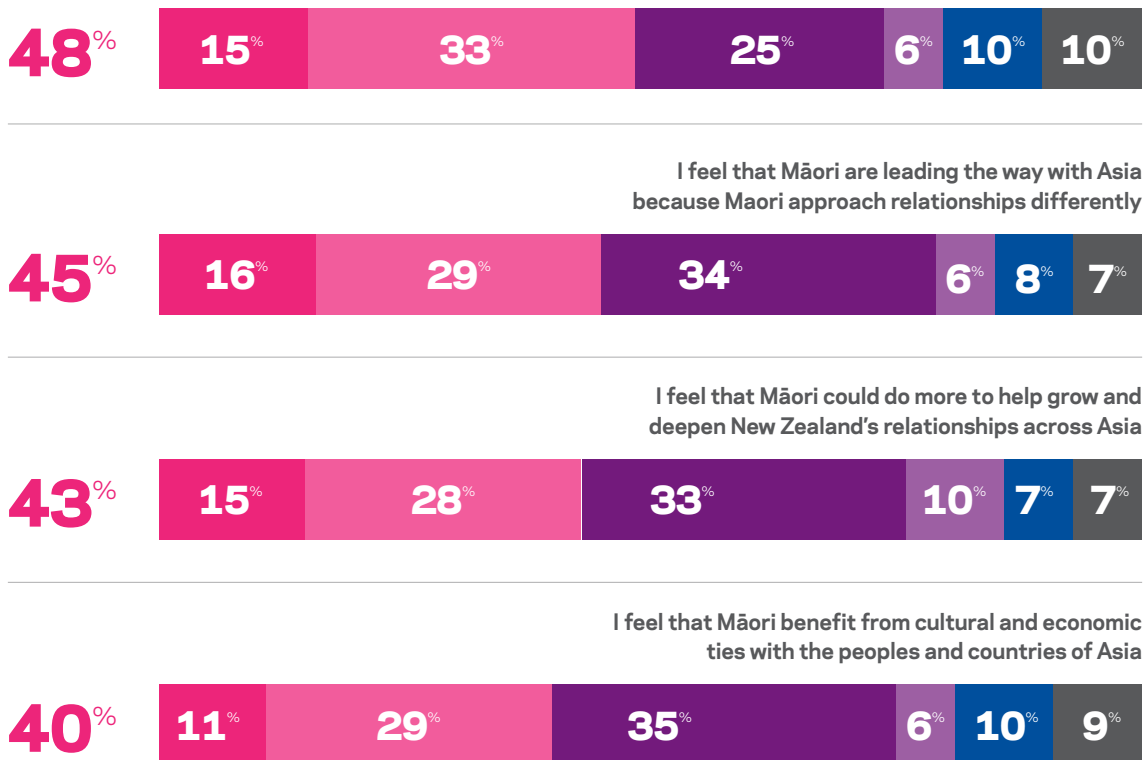
Around four in ten Māori agree with each of the other statements. Forty-five percent of Māori agree that Māori are leading the way with Asia because Māori approach relationships differently and 43 percent agree that Māori could do more to help grow and deepen New Zealand's relationships across Asia.

Despite 60 percent of Māori agreeing that Asia is important to New Zealand's future (consistent with the same finding in the 2018 *Perceptions of Asia and Asian Peoples from a Te Ao Māori Perspective*), only four in ten Māori (40 percent) feel that Māori benefit from cultural and economic ties with the peoples and countries of Asia, while 16 percent do not think that Māori benefit from cultural and economic ties.

Figure 36

Māori relationships with Asia

Percentage of Māori who agree with the following



- Strongly Agree
- Agree
- Neither disagree or agree
- Disagree
- Strongly disagree
- Don't know

Source: MA1 - How much do you agree or disagree with the following statements:

Base: Māori - (2023) n=208

Views from New Zealand's Asian diaspora

New Zealanders of Asian heritage have skills, knowledge and experience that can help New Zealand to succeed in Asia, but often feel their own careers have been negatively impacted by their ethnicity

We asked New Zealanders of Asian heritage if they have skills or experience that could help New Zealand succeed in Asia. The majority said yes (64 percent).

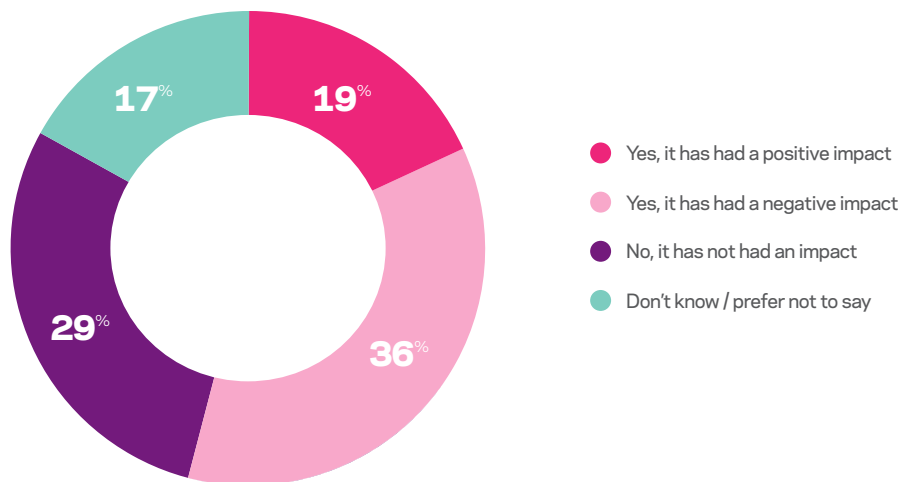
We also asked New Zealanders of Asian heritage questions about the impact of their heritage on their careers.

Despite having unique skillsets that could support New Zealand to build stronger ties to Asia, New Zealanders of Asian heritage are more likely to believe their ethnicity has had a negative, rather than positive, impact on their career trajectories. Over one in three (36 percent) note a negative impact, while only one in five (19 percent) perceive their ethnicity to have had a positive impact.

Women are more likely to note a negative impact than men (40 percent compared with 33 percent).

Figure 37

Impact of Asian heritage on careers

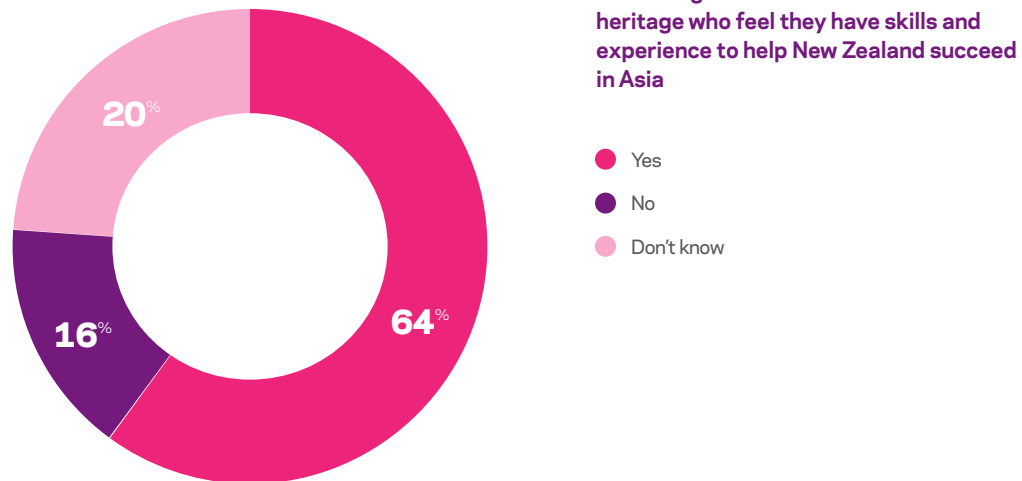


Source: B4 - Do you feel your Asian heritage has impacted whether you get jobs or are promoted in your career (including into more senior roles, onto boards and into management positions)?

Base: Asians - (2023) n=344

Figure 38

Skills and expertise to help New Zealand succeed in Asia



Source: B5 - Do you feel you have skills and expertise from being of Asian heritage that could help New Zealand succeed in Asia?

Base: Asians - (2023) n=344

“To understand both cultures and different etiquette. Having exchange students to learn more about our/their culture, having students engaging in conversations with students from different countries to really understand each other and feel what it’s like to talk with someone with a different cultural background.”

18-19 years, female, Korean heritage, Canterbury

Those of Asian heritage regard trade and tourism as the biggest opportunities for New Zealand in Asia

When asked what they consider the biggest opportunities for New Zealand in Asia, those of Asian heritage identified a diverse range of ideas. The most frequently mentioned opportunities are:

- **Trade, export and business opportunities:** New Zealanders of Asian heritage see great potential for trade between New Zealand and Asia, showcasing and exporting New Zealand's quality produce (for example dairy, fruit and other agricultural produce). Future opportunities for international education were also noted.
- **Travel and tourism:** Tourism and travel are considered an important way for New Zealand — and Asian countries — to boost their economies, while also increasing reciprocal understanding between countries and creating further opportunities.
- **Filling gaps in New Zealand's labour and skills base:** Asia's huge populations and New Zealand's labour market shortages mean opportunities to fill gaps locally with skilled professionals, assuming appropriate immigration policy settings. For example, New Zealanders of Asian heritage commented that the workforces of many Asian countries have strong IT skillsets and these professionals could potentially help to strengthen New Zealand's skills base.
- **Culture, arts, cuisine:** These provide opportunities for widening New Zealanders' horizons and enriching their interactions with Asia in their daily lives.
- **Collaboration and reciprocity:** The point was made that there are many opportunities for New Zealand to learn from Asia's success stories. The concepts of mutual opportunities, exchange and collaboration are important. Some stressed the importance of New Zealanders being understanding and accepting of those of Asian heritage and more open-minded to opportunities that they can create with Asia.

Q: In your view, what are the biggest opportunities for New Zealand in Asia?

“Exchange of culture and technologies. There are good trade opportunities and also space for cultural learning and exchange. New Zealand is not very accepting of other cultures and of people who behave or look different. The expectation is that people should adopt the culture of the host country.”

How does media and entertainment consumption influence perceptions of Asia?

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

Key findings

Fewer New Zealanders recall having consumed Asia-related media in 2023 than in 2022.

While one in two consider the amount of Asia-related news is about right, one third think there is too little coverage.

Coverage of Asia in the media is considered reasonably balanced, if a little too negative.

While traditional media is still the main source of Asia-related coverage, use of social media as a key source has increased significantly.

Consumption of Asian entertainment is increasing.

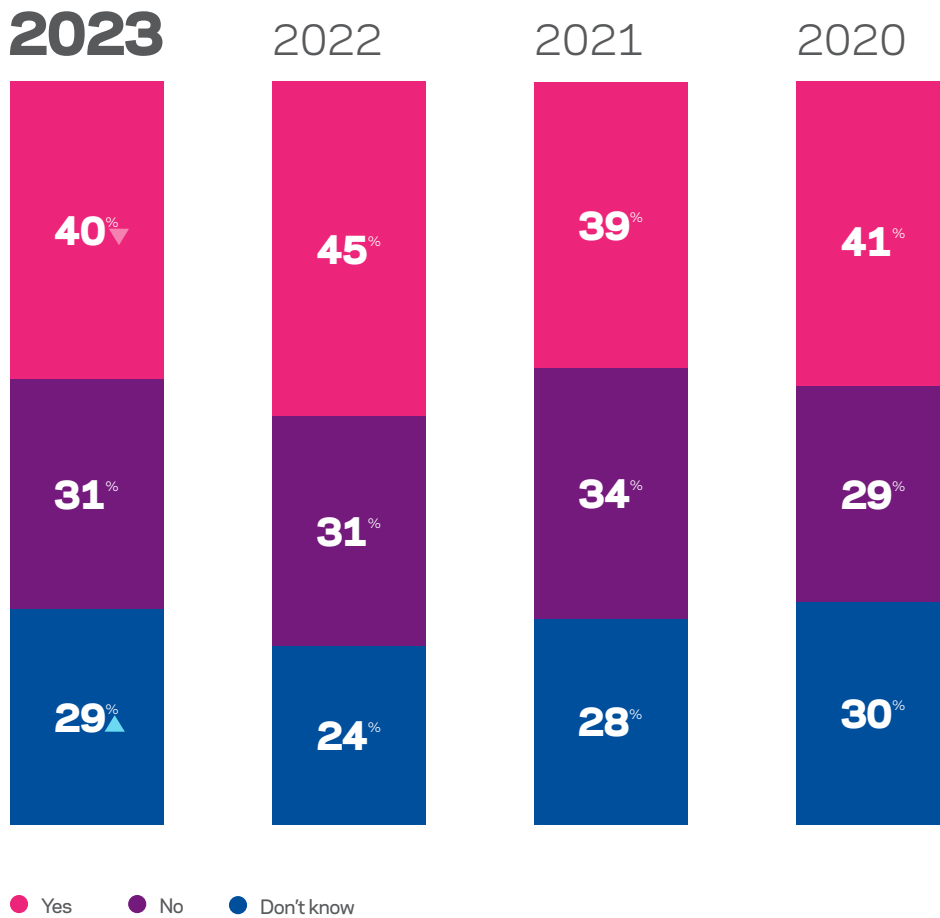
Fewer New Zealanders recall seeing or reading Asia-related news content in 2023 compared to 2022

In 2023, 40 percent of New Zealanders recall seeing, hearing or reading something in the news or media in the last three months about Asia-related events, issues or people. Recall is lower than in 2022 (45 percent recall), but at a similar level to that noted in 2021 and 2020.

Recall is significantly higher among male New Zealanders (48 percent compared with 32 percent among females), and highest among the over 60 age group (54 percent). (Note: older New Zealanders generally tend to be more regular consumers of traditional news and media sources than the under 30s.)

Figure 39

Have New Zealanders seen media coverage of Asia in the last three months?



Source: M1 - Do you recall having seen, heard, or read anything in the news or media about Asia-related events, issues or people in the last three months?

Base: All New Zealanders - (2023) n= 2,300, (2022) n= 2,323, (2021) n=2,334, (2020) n=2,001, (2019) n=2,002

Just over one third of New Zealanders think that Asia receives too little coverage in the New Zealand media

In 2023, New Zealanders who have seen Asia-related media or news coverage in the past three months are more inclined to think that Asia receives about the right amount of coverage (49 percent), or too little (35 percent), than too much (four percent). Nearly half of the New Zealanders of Asian heritage (48 percent) think that Asia receives too little coverage, compared to 32 percent of New Zealanders with non-Asian heritage.

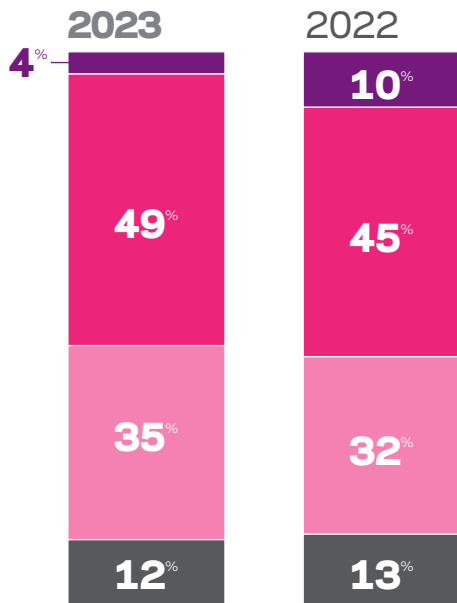
Asia-related coverage is considered reasonably balanced, if a little too negative

Views about the sentiment of Asia coverage in New Zealand media are similar to those expressed in 2022. While just over half of New Zealanders (52 percent) who have seen Asia-related media or news coverage in the past three months feel that the coverage is balanced and fair, 21 percent consider coverage to be too negative.

Those of Asian heritage are much more likely to think that the coverage is too negative (34 percent, compared with 18 percent of non-Asian heritage).

Figure 40

Volume of Asia-related coverage in New Zealand media



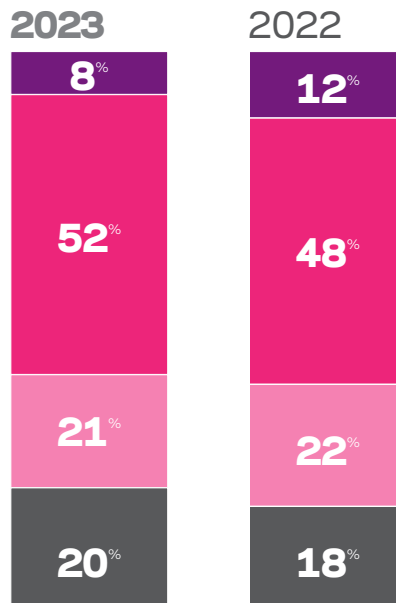
- Asia receives too much coverage
- Asia receives about the right amount of coverage
- Asia receives too little coverage
- Don't know

Source: M3 - Does Asia receive too much or too little coverage in New Zealand media?

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

Figure 41

Sentiment of Asia-related coverage in New Zealand media



- Are too positive about Asia
- Get it about right
- Are too negative about Asia
- Don't know

Source: M6 - Which of the following best describes your view of how the New Zealand media portrays Asia? The media...

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

Online media sources are becoming more widely used for consuming Asia-related content

While traditional media is still the main source of information about Asia-related events, issues, or people (69 percent mention compared with 71 percent in 2022), there has been growth in the use of other types of media.

Online newspapers/magazines, blogs and websites are the second main source of news (55 percent mention up by four percentage points from 51 percent in 2022). Use of social media has increased significantly: in 2023, 47 percent recall receiving most of their information from social

media, compared with 37 percent in 2022. Social media is the main source of Asia-related news and information among the under 30 age group (71 percent).

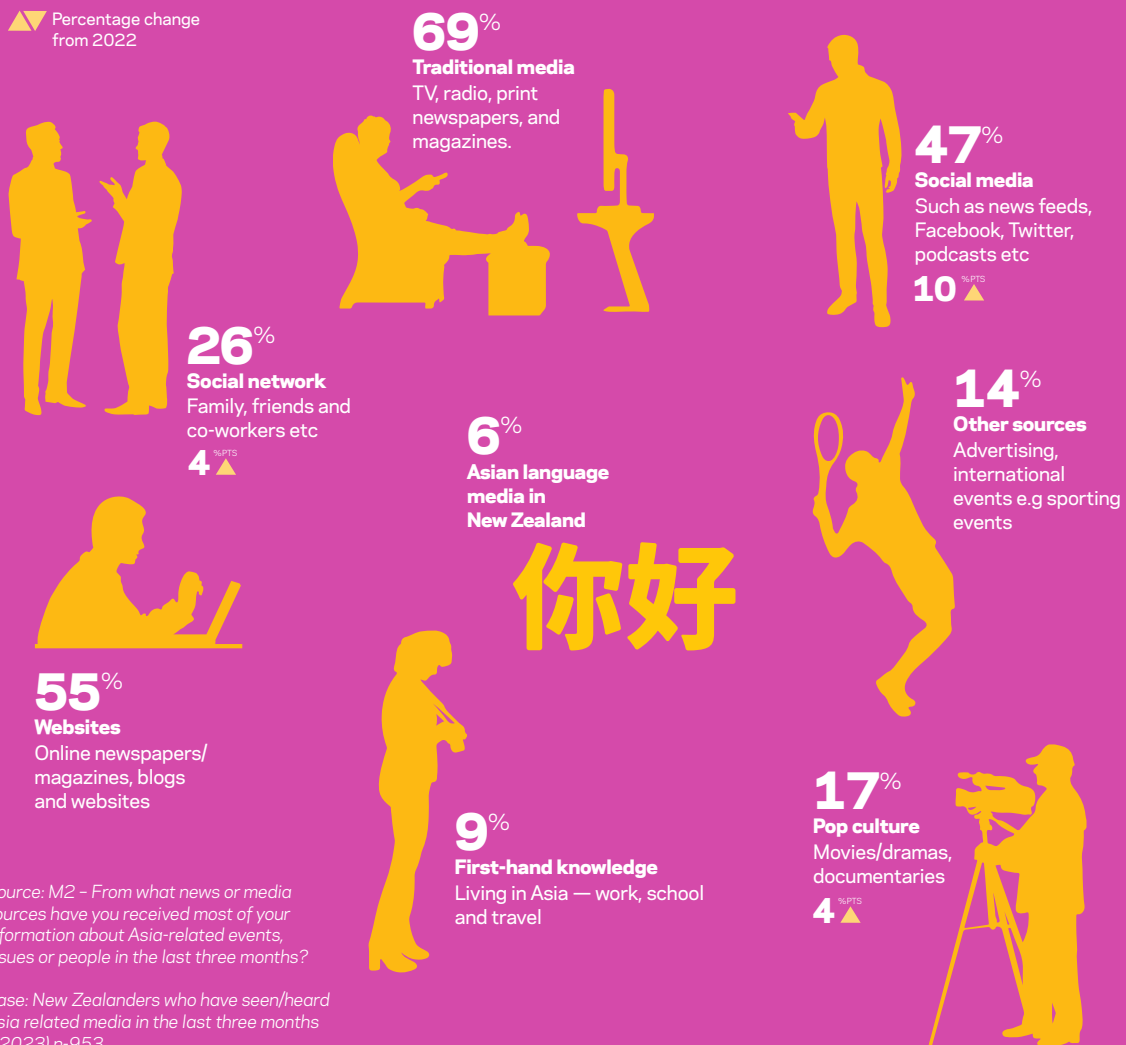
Pop culture has also been growing in significance as a source, with 17 percent mainly using this source in 2023.

Those of Asian heritage are more likely than others to consume Asia-related content via social media (67 percent) and social networks (42 percent) and less likely to use traditional media (49 percent).

Figure 42

Where do New Zealanders get their Asia news from?

▲▼ Percentage change from 2022



Source: M2 – From what news or media sources have you received most of your information about Asia-related events, issues or people in the last three months?

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

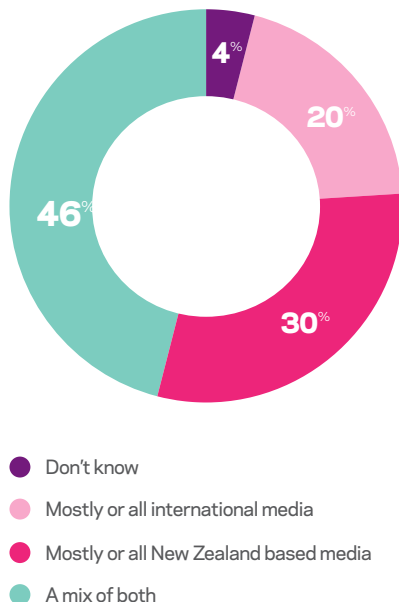
New Zealand media is the main source of Asia-related coverage

Three in four New Zealanders consume New Zealand-based media coverage of Asia, with 30 percent saying their sources are mostly all or New Zealand-based. In contrast, 20 percent say their Asia-related coverage tends to come mostly or all from international media.

New Zealanders of Asian heritage get their news from international media more than those of non-Asian heritage. While half of New Zealanders with Asian heritage get their news coverage from a mix of both sources, one third (33 percent) get their coverage mainly or all from international sources. For comparison, 45 percent of New Zealanders of non-Asian heritage get their Asia-related news from a mix of both domestic and international media, while only 17 percent get their news from mostly or all international media.

Figure 44

New Zealand or international media sources



Source: M5 - Does your news coverage of Asia tend to come from New Zealand based media or international media (such as the BBC, Reuters, South China Morning Post)? (New question in 2023)

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

New Zealanders are interested in a wide range of Asia-related topics

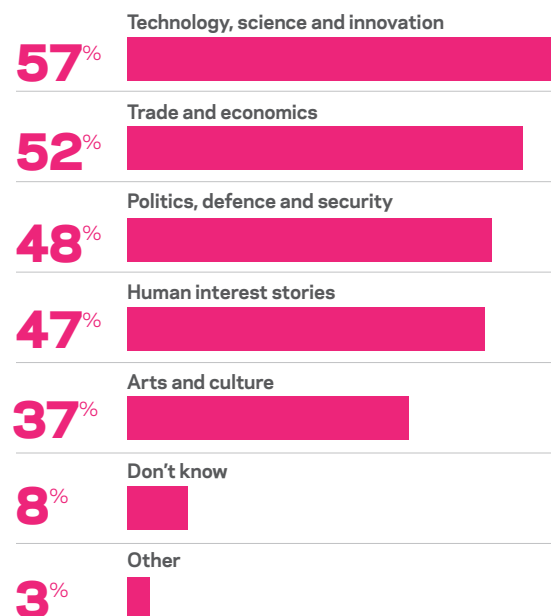
When asked what Asia-related topics they would like to hear or read more about in the New Zealand media, New Zealanders express interest in a wide range of topics.

Technology, science and innovation are the topics New Zealanders are most interested in hearing more about (57 percent mention). Other topics includes trade and economics (52 percent), politics, defence and security (48 percent), human-interest stories (47 percent), and arts and culture (37 percent).

Those of Asian heritage express greater interest in most topics, with particular interest in trade and economics (64 percent), human interest stories (60 percent) and arts and culture content (51 percent).

Figure 43

What Asia-related topics do New Zealanders want more of?



Source: M4 - What Asia-related topics would you like to hear or read more about in the New Zealand media, if any? (New question in 2023)

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

Consumption of Asian entertainment is increasing

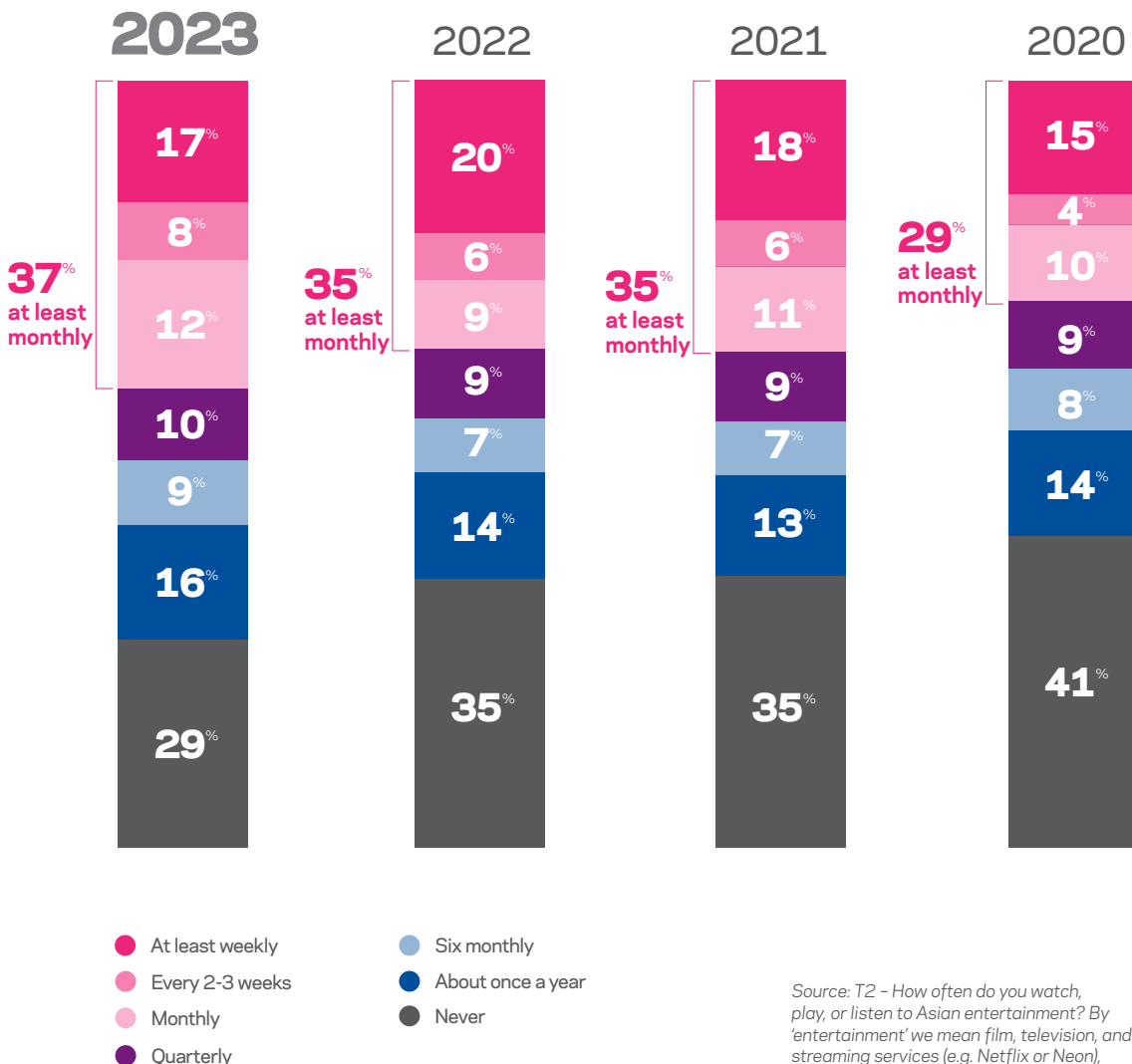
The proportion of New Zealanders who watch, play, or listen to Asian entertainment has increased since 2022, with just over seven in ten consuming Asian entertainment (compared with 65 percent in 2022 and 2021), although frequent consumption remains unchanged (weekly or more often has not increased).

Those of Asian heritage are the most frequent consumers, with just over half (52 percent) consuming Asian entertainment at least weekly and 80 percent consuming at least monthly.

While there are no differences by gender, there are notable differences by age. Consumption is greatest among under 30-year-olds, with 14 percent consuming Asia-related entertainment more than once a week, and 22 percent doing so at least weekly. Nearly half of under 30-year-olds (49 percent) are consuming Asian entertainment at least monthly, compared with 37 percent of all New Zealanders.

Figure 45

How often do New Zealanders consume Asia-related entertainment?



Source: T2 - How often do you watch, play, or listen to Asian entertainment? By 'entertainment' we mean film, television, and streaming services (e.g. Netflix or Neon), online games, and social media made in Asia, about Asia, or by an Asian artist etc.

Base: All New Zealanders - (2023) n=2,300

Background, methodology and sample profiles

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





About the annual Perceptions of Asia and Asian Peoples Survey

Since 1997, the Foundation has undertaken regular research to monitor New Zealanders' perceptions of Asia, focused on understanding their views of the barriers to and benefits of relationships across Asia.

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

Survey content

A core set of questions has been included over time to allow for comparisons between years to be made. Research content has evolved over time. In 2023, it includes questions about:

- The perceived importance of Asia
- The perceived benefits to New Zealand of a relationship with Asia
- Perceptions of Asian peoples and cultures
- Perceived knowledge of Asia
- Involvement with Asian cultures
- Asia-related interests, including travel and attending relevant events
- Media perceptions and consumption.

New questions in 2023 cover the following topics:

- Countries that have the most influence over New Zealand now and reasons for this view

- Countries expected to have the most influence over New Zealand in 10-to-20 years time
- Place/s in Asia that most is known about, and source of this information
- Place in Asia that is of greatest interest in learning more about, and reasons for this
- Māori relationships with Asia
- Asian diaspora: perceptions of value of skills to help New Zealand succeed in Asia and biggest opportunities for New Zealand in Asia
- Asia-related topics of interest in the New Zealand media
- Sources of news coverage of Asia.

Some questions about perceptions of regional security dynamics and New Zealand foreign policy priorities were removed, to provide space for the new questions.

The survey took an average of 22 minutes to complete.

Quantitative methodology

The quantitative survey was conducted via an online self-completion methodology (used since 2017).

New Zealanders were drawn from a mix of panels: 70% from Kantar's Consumer Link panel, 23% from Ipsos New Zealand's online I-Say panel and the remaining 7% from river sampling (an online sampling method that recruits New Zealanders by inviting them to the survey while they are doing some other online activity).

Note: in previous years, the research was conducted using Kantar New Zealand's online panels. Some minor change is possible in metrics, given the change in panel.

A nationally representative sample of 2,300 New Zealanders aged 15 years and over completed the survey between 6-28 November 2023. In 2022, the total sample size was n=2,323.

Details about the sample profile are included.

Data analysis

Coding of open ended data: Open ended questions were post-coded into themes.

Data weighting: The survey data were weighted for the population aged 18 years and over (using 2018 Census data) to ensure final results were representative of the New Zealand population by gender, age, region, and ethnicity.

Notes to report

Analysis

Margin of error: All sample surveys are subject to sampling error, the measure of uncertainty arising from survey estimates because only a sample of the population is observed. The maximum sampling error for the total sample is plus or minus 2.0% at the 95% confidence interval. That is, there is a 95% chance that the true population value of a result of 50% lies between 48% and 52%.

Significance testing: All subgroup differences reported are statistically significant at the 95% confidence interval unless otherwise stated. This means that the difference is a true difference statistically, and not due to random variation.

Sample composition: Note, the composition of the sample can impact the sensitivity of the significance testing results. That is, the larger the sub-sample size (e.g., of a particular ethnicity), the greater the chance of detecting statistically significant results compared with other smaller sub groups of New Zealanders.

Rounding: In some cases, NET percentages may not add up exactly to the individual response categories and may differ by one percentage point, due to rounding.

'Don't know' responses have been included where relevant (that is, when they are valid responses and add value to the findings). Please refer to the base descriptions on each page for more information.

Verbatim comments: Verbatim comments are included throughout the report. These are sourced from responses to the open-ended survey questions

Sample profile

The tables below show details of the sample achieved. The first column shows the proportion of New Zealanders who responded to the survey and the second column shows the proportion of the total sample, for the weighted subgroups.

Gender

| | Unweighted percent | Weighted percent |
|--------|--------------------|------------------|
| Male | 49 | 51 |
| Female | 51 | 49 |

Age

| | Unweighted percent | Weighted percent |
|-------------|--------------------|------------------|
| 15-17 years | <1 | 2 |
| 18-24 years | 11 | 18 |
| 25-39 years | 26 | 22 |
| 40-59 years | 34 | 32 |
| 60+ years | 30 | 26 |

Region

| | Unweighted percent | Weighted percent |
|-------------------------------|--------------------|------------------|
| Northland | 4 | 4 |
| Auckland region | 35 | 33 |
| Waikato | 7 | 10 |
| Bay of Plenty | 6 | 7 |
| Gisborne / Hawkes Bay | 4 | 4 |
| Taranaki | 3 | 3 |
| Manawatū / Wanganui | 5 | 5 |
| Wellington | 11 | 11 |
| Nelson / Tasman / Marlborough | 4 | 4 |
| Canterbury | 15 | 13 |
| Otago | 5 | 5 |
| Southland | 1 | 2 |

Urban Status

| | Unweighted percent | Weighted percent |
|---------------------|--------------------|------------------|
| A major centre | 51 | 48 |
| A provincial city | 26 | 27 |
| A provincial centre | 14 | 14 |
| A rural area | 10 | 10 |

Base

Ethnicity related aspects of the sample are as follows:

Ethnicity

| | Unweighted percent | Weighted percent |
|----------------------|--------------------|------------------|
| New Zealand European | 71 | 71 |
| Māori | 9 | 14 |
| Pasifika | 3 | 6 |
| Asian | 16 | 15 |
| Other | 4 | 3 |

Note: Respondents could nominate more than one ethnicity.

Asian heritages

| | Asian heritage (weighted %) |
|----------------------|-----------------------------|
| Base | 366 |
| Chinese | 33 |
| Indian | 33 |
| Southeast Asian | 17 |
| Japanese | 4 |
| Korean | 3 |
| Other Asian | 15 |
| European | 9 |
| Māori | 3 |
| Pacific Islands/Fiji | 16 |
| All other | 1 |

Note: Respondents could nominate more than one ethnicity.

Born in New Zealand

| | Total (Weighted %) | Asian heritage (weighted %) | Non-Asian heritage (weighted %) |
|-------------|--------------------|-----------------------------|---------------------------------|
| Base | 2,300 | 366 | 1,934 |
| Yes | 71 | 25 | 79 |
| No | 29 | 75 | 21 |

Years living in New Zealand

| | Total (Weighted %) | Asian heritage (weighted %) | Non-Asian heritage (weighted %) |
|---------------|--------------------|-----------------------------|---------------------------------|
| Base | 2,300 | 366 | 1,934 |
| 1-5 years | 10 | 12 | 1 |
| 5-10 years | 14 | 18 | 2 |
| 10-20 years | 25 | 22 | 13 |
| 20 plus years | 51 | 48 | 83 |

Asian languages spoken

| | Total (Weighted %) | Asian heritage (weighted %) | Non-Asian heritage (weighted %) |
|---------------------------|--------------------|-----------------------------|---------------------------------|
| Base | 2,300 | 366 | 1,934 |
| Chinese | 6 | 30 | 1 |
| Hindi | 5 | 24 | 1 |
| Japanese | 5 | 8 | 4 |
| Filipino | 3 | 12 | 1 |
| Korean | 2 | 4 | 2 |
| Another Asian language | 4 | 22 | 1 |
| None of the above/ unsure | 77 | 14 | 88 |

ABOUT THE ASIA NEW ZEALAND FOUNDATION TE WHĪTAU TŪHONO

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

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

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

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Te Whītau Tūhono |