



PERCEPTIONS OF CHINA MONITOR: SURVEY 2018



Ko Te Kaunihera o Aotearoa me Haina
New Zealand China Council
新西兰-中国关系促进委员会



Research conducted by:







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FOREWORD

What do New Zealanders really think about China? Until now, we haven't had a sufficient evidence base to give us an answer. The Asia New Zealand Foundation's [Perceptions of Asia Research](#) has built valuable knowledge in this area. The time has come to complement this with insights specific to New Zealanders' perceptions of China, given China's importance to New Zealand as a comprehensive partner in trade, science, the arts and more.

The New Zealand China Council was established in 2012 to build strength and resilience into New Zealand's relationship with China. Understanding public attitudes toward China, and how they are changing over time is critical to achieving our goals.

This survey is the first to benchmark New Zealanders' attitudes toward China specifically, from the country and the bilateral relationship in general, to trade, investment and culture. It will be used as a baseline to identify trends that emerge over time.

Of all the key findings from this year's survey, it is heartening to note that overall, opinions of New Zealand's relationship with China are positive.

In fact, three times as many New Zealanders say the relationship is positive than those of us who say it is negative.

It is also encouraging that many New Zealanders say they are keen for more engagement with China, such as increased trade and investment in tourism and education. On the cultural front, the survey shows New Zealanders are well aware of the value of learning Mandarin, and many of us are keen to visit China in the future.

At the same time, the survey reveals most New Zealanders think China benefits more from the relationship than we do. It also shows concerns about perceived levels of Chinese investment in commercial and residential property.

The results give us valuable insights which will help address the information gap about public attitudes toward China among New Zealanders. We welcome feedback on the survey and encourage its use as a starting point for further discussion about the New Zealand China relationship.

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ABOUT THE SURVEY

Our Approach:

This research used a quantitative online survey of 1,001 New Zealanders aged 18 years and over, conducted between the 2nd and 9th of February 2018. It has a weighted margin of error of 4.0% at the 95% confidence interval. This means, for example, if the survey found 50% of New Zealanders have a positive view of the NZ China relationship, we could be 95% sure of getting the same result (plus or minus 4.0%) if we interviewed everyone in the population.

To ensure the survey sample reflected the New Zealand population, quotas were set for gender, age and regions. After fieldwork, the data was weighted in terms of age and education level to match the population profile using information from the 2013 Census.

KEY FINDINGS



43% of New Zealanders say New Zealand's relationship with China is positive, three times as many who say it is negative (14%).



41% of New Zealanders believe that China benefits the most from the New Zealand China relationship. 28% think both countries benefit equally, and 16% think New Zealand benefits most.



Over one third of New Zealanders would like to see trade between New Zealand and China increase. Almost as many (38%) want it to stay the same. 12% want to see it decrease.



New Zealanders tend incorrectly to identify China as New Zealand's largest investor. New Zealanders also incorrectly believe Hotels, Commercial Property and Residential Housing are the top areas in which China invests in New Zealand.



69% of New Zealanders think Mandarin is one of the most useful foreign languages New Zealand schools can teach.



GENERAL OPINIONS ABOUT CHINA'S RELATIONSHIP WITH NEW ZEALAND

Q: Would you say your general opinion of New Zealand's relationship with China is positive, negative or neutral?

Three times as many New Zealanders say the relationship is positive than those who say it is negative.

43% —

Think New Zealand's relationship with China is positive

38% —

Think the relationship is neutral

14% —

Think the relationship is negative

5% —

Don't know

Q: Would you say your general opinion of New Zealand's relationship with these countries (see table) is positive, negative or neutral?

We view our relationship with China more positively than we do our relationship with the USA. We view it on par with our relationship with Japan, and behind only our relationships with Australia and the UK.

General opinion of New Zealand's relationship with these countries

PERCEPTION	POS %	NEG %	NEU %
AUSTRALIA	63	10	24
UK	63	9	24
JAPAN	44	14	37
CHINA	43	14	38
FIJI	42	16	37
USA	39	17	40
GERMANY	31	13	43
SOUTH AFRICA	27	12	51

Q: Thinking about the overall relationship that exists between New Zealand and China, which country do you think currently benefits most from this relationship?

41% —

Believe China benefits the most

28% —

Think both countries benefit equally

16% —

Think New Zealand benefits the most.

14% —

Don't know



PERCEPTIONS OF NEW ZEALAND'S TRADING RELATIONSHIP WITH CHINA

Q: Which countries do you think are New Zealand's top trading partners? (Select 3)

Knowledge of New Zealand's trading partners is relatively accurate. Most New Zealanders correctly identify China as one of our top trading partners.

NEW ZEALAND'S TOP TRADING PARTNERS:

SURVEY DATA	OFFICIAL DATA
CHINA	CHINA
AUSTRALIA	AUSTRALIA
USA	EU 28
UK	USA
JAPAN	JAPAN
SOUTH KOREA	SINGAPORE
SINGAPORE	UNITED ARAB EMIRATES
UNITED ARAB EMIRATES	INDIA
GERMANY	TAIWAN
THAILAND	INDONESIA

Q: China is now New Zealand's largest trading partner. Were you aware that China is New Zealand's largest trading partner?

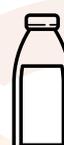
63% —

Were aware that China is New Zealand's largest trading partner.

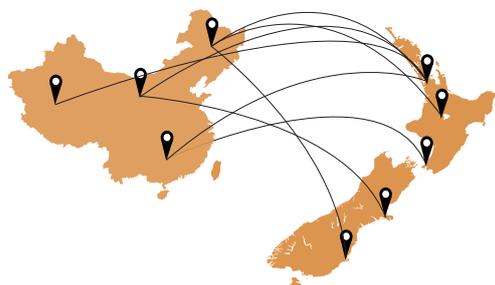
Q: What do you think are the top three sectors or industries in New Zealand that export to China?

Knowledge of what we export most to China is relatively accurate. Dairy, followed by meat and forestry are seen as the top sectors that export to China.

TOP THREE PICKS:

SURVEY DATA	OFFICIAL DATA
 #1 DAIRY	 #1 DAIRY
 #2 MEAT	 #2 BUSINESS / PERSONAL TRAVEL
 #3 FORESTRY (UNPROCESSED LOGS)	 #3 MEAT

Official data - Statistics New Zealand: Goods and services trade by country: Year ended March 2018



Q: Please indicate whether you would like trade between New Zealand and China in general to increase, decrease or stay the same?

Overall, New Zealanders would like to see trade with China increase, or stay the same.

39% —

Want to see trade with China increase

38% —

Want it to stay the same

12% —

Want to see it decrease

11% —

Don't know.

Q: In terms of the following sectors and industries (see table below) please indicate whether you think trading between New Zealand and China should increase, decrease or stay the same?

While New Zealanders would like to see trade with China increase or stay the same overall, this is dependent on the sector and industry.

New Zealanders are more likely to want increased trade with China in tourism and education, wool and wine.

New Zealanders are less likely to want increased trade in natural resource based industries like forestry (logs) and fisheries.

NB: Respondents were only asked about sectors and industries they believed as being among the top 3 sectors and industries in New Zealand that export to China.

OPINIONS ON NZ CHINA TRADE BY SECTOR OR INDUSTRY:

	INC %	DECR %	SAME %
TOURISM	55	5	36
WINE	55	3	32
EDUCATION	41	13	39
WOOL	41	8	43
DAIRY	40	18	36
FRUIT	36	12	40
MEAT	31	25	37
PROCESSED WOOD PRODUCTS ¹	30	14	46
FORESTRY (UNPROCESSED LOGS)	21	47	26
FISHERIES	15	35	44

1. (e.g. sawn timber, manufactured wood products)



PERCEPTIONS OF CHINESE FOREIGN INVESTMENT IN NEW ZEALAND

Q: Which one of the following statements best describes how you feel about foreign investment in New Zealand?

The majority support foreign investment in general but only if strict vetting or controls are in place.

66% —

Support foreign investment, but only if strict vetting or controls are in place

16% —

Don't support any foreign investment in New Zealand at all

7% —

Fully support all forms of foreign investment in New Zealand

Q: Which controls would you want to be in place for you to support foreign investment in New Zealand?

NB: This question was asked of those who reported that they would support foreign investment but only if strict vetting or controls are in place.

The majority support controls that ensure investors do not have majority ownership.

76% —

Want controls that limit foreign investment so that investors don't have majority ownership

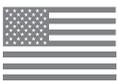
47% —

Want controls that limit foreign investment in certain industries or sectors only



Q: Which of these countries do you think invests most in New Zealand? (Select 3).

New Zealanders incorrectly identify China as the biggest foreign investor in New Zealand

SURVEY DATA	OFFICIAL DATA
 #1 CHINA	 #1 AUSTRALIA
 #2 AUSTRALIA	 #2 UK
 #3 JAPAN	 #3 USA

Official data - NZTE Investment Statistics

Q: What do you think are the top three areas where China invests most in New Zealand?

Hotels and Commercial Property and Residential Housing are incorrectly seen as being the top areas in which China invests in New Zealand

SURVEY DATA	OFFICIAL DATA
 #1 COMMERCIAL PROPERTY	 #1 INFRASTRUCTURE AND UTILITIES
 #2 RESIDENTIAL HOUSING	 #2 PRIMARY INDUSTRIES & FOOD
 #3 PRIMARY INDUSTRIES & FOOD	 #3 COMMERCIAL PROPERTY

Official data - NZTE China FDI/ODI Database.



New Zealanders' nuanced views on investment from China are further illustrated by the following findings.



49%

Of those who selected tourism as one of the top 3 areas China invests most in New Zealand, 49% think Chinese investment should increase in this area.



40%

Of those who selected education as one of the top 3 areas China invests most in New Zealand, 40% think Chinese investment should increase in this area.



73%

Of those who selected residential as one of the top 3 areas China invests most in New Zealand, 73% think Chinese investment should decrease in this area.



42%

Of those who selected hotels and commercial property as one of the top 3 areas China invests most in New Zealand, 42% think Chinese investment should decrease in this area.



NEW ZEALANDERS' INTEREST IN CHINESE CULTURE

Q: Have you ever visited China? Do you have plans or would you like to visit China in the future?

As a measure for their interest in Chinese culture, almost half of all New Zealanders say they would like to visit China in the future.

10% —

Have visited China.

46% —

Would like to visit China in the future, but do not currently have plans to.

Q: Which of the following foreign languages do you think are most useful to be taught in New Zealand schools?

The majority of New Zealanders (69%) think Mandarin is one of the most useful foreign languages New Zealand schools can teach.



69%
Chinese (Mandarin)



40%
Japanese



29%
Spanish



29%
French

APPENDIX

NZ CHINA COUNCIL– SURVEY SAMPLE PROFILES

GENDER	Unweighted	Weighted
Unweighted base =	1001	1001
	%	%

Male	48	46
Female	52	54
Total	100	100

AGE	Unweighted	Weighted
Unweighted base =	1001	1001
	%	%

18-24	12	13
25-34	16	16
35-44	18	18
45-54	19	19
55-64	15	16
65-74	12	12
75 and over	7	6
Under 18	0	0
Total	100	100

LOCATION	Unweighted	Weighted
Unweighted base =	1001	1001
	%	%

Northland	5	7
Auckland	29	28
Waikato	11	11
Bay of Plenty	7	7
Gisborne	1	1

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Hawke's Bay	4	3
Taranaki	2	2
Manawatu	4	5
Whanganui	1	1
Wairarapa	1	1
Wellington	10	10
Tasman	1	1
Nelson	2	2
Marlborough	1	1
West Coast	1	1
Canterbury	13	13
Otago	5	4
Southland	1	2
Total	100	100

ETHNICITY	Unweighted	Weighted
Unweighted base =	1001	1001
	%	%
NZ European (or Pakeha)	82	81
Māori	18	21
Pacific	2	2
Middle East/Latin American/African	1	1
Chinese	2	2
Indian	2	2
Other Asian (please specify)	1	1
Other ethnic group (please specify)	2	2
Would rather not say	0	0

Source:

Official data - Statistics New Zealand:
Goods and services trade by country: Year ended March 2018

