



# TALBOT MILLS

Research

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## General Public and Businesses results

### CAPE – Latin America

November – December 2021

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#### Methodology

Results in this report were based on a representative online survey of the general public aged 18 years and over.

The general public sample also identified approximately 9% of respondents who are decision makers of businesses involved in exporting, importing, or investing in countries outside of New Zealand.

Fieldwork was conducted from 16th November to 9th of December 2021.

The margin of error for a sample size of  $n=1,000$  is plus or minus 3.1%

In addition, there was over-sampling of decision makers involved in businesses that export, import or invest in countries outside of New Zealand ( $n=200$ ).

This gave a total sample of  $n=290$  for this audience with a margin of error of plus or minus 6.4%

To account for the oversample, the total sample was weighted down as well as weighted to gender, age, region and ethnicity from the 2018 census.

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## **GENERAL PUBLIC**

### **Importance and awareness of Latin America**

Awareness of differences between Latin American Nations remained relatively low, but over half of respondents consider it important to NZ.

- Just over a third (35%, down 2%) declared awareness of differences between Latin American nations.
- Consistent with previous years, about half (53%, down 5% from 2020) said Latin America is very or somewhat important to New Zealand. *'Travel and leisure'* (31%, up 2%) and *'Business and trade'* (30%, up 1%) were again seen as the strongest links between New Zealand and Latin America.
- Respondents were asked to think positively about Latin America and then nominate a positive word. Similarly to results in 2020, *'Culture'*, *'Vibrant'*, and *'Friendly'*, continued to come through when describing Latin America, along with *'Diverse'*, *'Fun'*, *'Passionate'*, *'Dancing'* and *'Food'*. On negatives, *'Drugs'*, *'Crime'* and *'Poverty'* were the top-of-mind terms used to describe Latin America – the same top three as in 2020 and 2019.

### **Knowledge and information sources of Latin America**

Most people don't keep up to date with Latin American news and they suggest that lack of news, interactions, and prior knowledge are key barriers to increasing awareness. Those who do keep up to date still rely on traditional media along with social media.

- 21% (down 2%) said they keep up to date with developments in Latin American politics, economics, business, or culture.
- Over half (56%, up 1%) continued to source their information about Latin America from traditional media, followed by 35% from social media (down 1% from 2020). As in 2020, this was followed by 'friends' and 'popular culture'.
- Around two fifths (39%) selected *'Lack of news on the region'* as a barrier to increasing their awareness of Latin American nations. This was followed by *'Lack of interactions with Latin Americans in New Zealand'* (37%) and *'Lack of prior knowledge about Latin America'* (31%).
- 27% said they know a lot or a fair amount about Covid's impact on Latin America.



## Visitation and COVID-19

Less than a tenth of people said they visited Latin America in the past five years, but a quarter said visiting would be likely once restriction-free travel resumes.

Latin America was not top of mind for most people in terms of New Zealand's Covid recovery.

- 13% of respondents had visited Latin America at least once, with 7% of respondents having visited Latin America in the last five years (unchanged from 2020). One-quarter (25%, down 1%) said they were likely to travel to Latin America once flights resume and travelers returning to New Zealand are no longer required to undergo 14 days quarantine.
- Almost one-quarter (23%, unchanged from 2020) believed Latin America has an important role to play in New Zealand's recovery from COVID-19. Amongst all respondents, *'Attracting international tourists'*, *'Market diversification options for exporters'* and *'Attracting international students'* were chosen as the leading roles Latin America can play in New Zealand's recovery from Covid.

## Education

Overall, the general public remained receptive to education around Latin American nations and language, but for many other languages and cultures take priority. A lot of people are interested in learning more Spanish or Portuguese but fewer actually think it likely they will develop any Latin American knowledge or skills in the near future.

- The vast majority (93%, up 1%) supported New Zealand children learning more than one language. However, respondents were still divided on how important it is for New Zealanders to learn Spanish or Portuguese (53% important, up 2%).
  - Of those who believed it is important to learn Spanish or Portuguese, 45% cited its worldwide use as a main reason why.
  - Of those who did not believe it is important, 44% said there would be no use for it and 41% said there are other languages New Zealanders should learn first (common examples were Māori and Mandarin).
- Half of respondents (50%, up 2%) thought it is important for New Zealand schools to teach more Latin American content.
- Just under half (45%) were interested in learning more Spanish or Portuguese. A third of respondents (33%) thought it is likely they will develop their Latin American knowledge and skills in the next five years. 7% said they can hold a conversation in either Spanish or Portuguese now.
- In terms of what Latin American-related knowledge and skills New Zealanders need to learn, 59% of respondents selected *'Intercultural skills'* while 56% selected *'Language skills'* and 36% selected *'Business skills'*.



## **BUSINESSES**

### **Definition**

Business respondents were categorised as respondents currently working as key decision makers in businesses that are involved in exporting to, investing in, or importing from countries outside of New Zealand. 290 respondents were categorised as business respondents.

*The following results are from business respondents only.*

### **Importance and awareness of Latin America**

NZ Businesses had much higher awareness and saw greater importance in Latin America than the general public.

- There is a high awareness of the differences between Latin American nations (77% aware, down 2%)
- 83% of businesses saw value for New Zealand businesses and organisations working with Latin American counterparts on indigenous economic development.
- 87% (up 2%) of respondents thought Latin America is important to New Zealand. Respondents believed *'Business and trade'* (23%, down 8%) and *'Travel and leisure'* (18%, down 13%) are the strongest links between New Zealand and Latin America.

### **Knowledge and information sources of Latin America**

Most businesses say they keep up to date with Latin American news, and as with the general public this was generally through traditional media and social media. Covid remains the main barrier for businesses doing more business with Latin America.

- 76% (up 5%) say they keep up to date with developments in Latin American politics, economics, business or culture. As in 2020, social media (53%) and traditional media (52%, up 3%) were the two top sources of information about Latin America respondents selected.
- Like the general public, the top two barriers business respondents selected in terms of increasing awareness of Latin American nations were *'Lack of news on the region'* (33%) and *'Lack of interactions with Latin Americans in New Zealand'* (31%).
- When asked about barriers to doing more business with Latin America, 39% of respondents selected *'COVID border restrictions'* (unchanged from 2020), 35% selected *'COVID's impact on New Zealand businesses'* (up 2%), 32% selected *'Language barriers'* (up 3%), and 31% selected *'COVID's impact on Latin America'* (down 4%).
- 64% said they know a lot or a fair amount about Covid's impact on Latin America.



## Visitation and COVID-19

Businesses were much more likely both to have traveled to, and to anticipate traveling to, Latin America than the general public. They were also significantly more likely to say Latin America has an important role to play in the Covid recovery, up from last year.

- Over half of respondents (52%) had ever visited Latin America, and 46% had visited in the past five years. 72% stated they were likely to travel to Latin America once flights resume and travelers returning to New Zealand are no longer required to undergo 14 days quarantine (up 3% from 2020).
- 71% of respondents believed Latin America has an important role to play in New Zealand's recovery from COVID-19 (up 14% from 2020).

## Education

Like the general public, business respondents were receptive to education around Latin American nations and language for children and themselves.

- The vast majority (97%, up 2%) supported New Zealand children learning more than one language and 84% (up 10%) felt it is important for New Zealanders to learn Spanish or Portuguese.
- 73% indicated they were interested in learning Spanish or Portuguese. 14% stated they are fluent or competent in Spanish or Portuguese.
- 79% (up 7%) thought it is important for New Zealand schools to teach more Latin American content. 72% (up 6%) indicated it was likely that they will develop their Latin America knowledge and skills in the next five years.
- In terms of what Latin American-related knowledge and skills New Zealanders need to learn, 69% (up 12%) selected '*Language skills*', 66% (up 15%) selected '*Intercultural skills*' and 60% (up 12%) selected '*Business skills*'.

## Business success in Latin America

Businesses nearly universally agree that enjoyment and knowledge of languages and culture were important for business success in Latin America.

- 89% (up 3%) thought that the enjoyment of the culture and people is important when choosing markets to focus on.
- The vast majority of respondents (89%, down 3% from 2020) thought that knowledge of local languages and local cultures is important for business success in Latin America, while 90% (unchanged from 2020) thought that knowing about local ways of getting things done is important for business success in Latin America.



## **New Zealand's business relationship with Latin America**

Covid appears to have had a mixed effect on business activity with Latin America, but the net effect was negative. Businesses generally have a positive view of the value of Latin American business - particularly in Brazil and Argentina.

- 26% said Covid has increased business activity with Latin America, 34% said there was less activity, 24% said no difference, while 16% don't engage with Latin America.
  - The main reasons for more activity were around more sales and to help Latin American people.
  - Main reasons for less activity were around lower demand, border closures, and importing/exporting difficulties.
- 83% (up 5%) saw value for New Zealand businesses and organisations to be working with Latin American counterparts on indigenous economic development.
- Similar to the general public, business respondents selected Brazil (29%, up 3%) and Argentina (16%, down 13%) as the most important Latin American countries to New Zealand.
- Most business respondents were knowledgeable or have at least heard of agreements or agreements under negotiation that are happening between New Zealand and individual Latin American countries:
  - Agreement on Climate Change, Trade and Sustainability (ACCTS): 38% aware and can name the Latin American country NZ is working with on it, while a further 39% have heard of it.
  - The Global Trade and Gender Arrangement: 35% aware and can name the Latin American country NZ is working with on it, while a further 41% have heard of it.
  - Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP): 29% aware and can name the Latin American country NZ is working with on it, while a further 43% have heard of it.
  - The Digital Economy Partnership Agreement (DEPA): 29% aware and can name the Latin American country NZ is working with on it, while a further 45% have heard of it.