THE IPSOS NEW ZEALAND ISSUES MONITOR OVERVIEW

Background Information

At Ipsos, we are passionately curious about people, markets, brands and society. We make our changing world easier and faster to navigate and inspire clients to make smarter decisions. As Ipsos and our previous brands we have operated in New Zealand since 1992.

The Ipsos New Zealand Issues Monitor tracks what New Zealanders are concerned about, who is worried about what, and which political parties are seen to be best able to improve these matters. From 15th to 18th May 2020 we conducted fieldwork for our eighth Ipsos NZ Issues Monitor report with a total of 1,000 New Zealanders aged 18 and older*.

The first Issues Monitor wave in 2020 was conducted at the beginning of March. However, following how rapidly the New Zealand government responded to the COVID-19 pandemic's effect, we chose not to release the results as they quickly became out of date. Thus, a second wave was conducted in May to understand what issues were important to New Zealanders as the country entered Alert Level 2 in our collective response to COVID-19.

This study did not have any external sponsors or partners. It was initiated and run by Ipsos because we are curious about the world we live in and how citizens around the globe think and feel about their world.

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*The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points
The Media Context: What was making New Zealand news in early May 2020?

Coronavirus: Ministry of Social Development hiring to manage COVID-19 demand
Newshub – 16 May 2020

'I wish we had a leader like her' - Piers Morgan raves over Jacinda Ardern's Covid-19 response
TVNZ.co.nz – 15 May 2020

Coronavirus: Third day without a new Covid-19 case
Stuff.co.nz – 14 May 2020

'Frustration levels definitely increasing' - Sporting organisations seek clarity over return to playing
TVNZ.co.nz – 13 May 2020

Coronavirus: Ardern says homeless will still be housed after Covid-19 crisis
Stuff.co.nz – 12 May 2020

Robertson’s huge numbers fit the Covid-19 moment
newsroom - 15 May 2020

Budget 2020: Government's Covid 19 wage subsidy scheme extended by 8 weeks, now up to $14b
NZ Herald – 14 May 2020
**Key Findings - May 2020**

47% of New Zealanders consider the **economy** to be the top issue facing New Zealand in May 2020, up nearly fourfold from 13% in March. This followed by **unemployment** (41%) and **housing / price of housing** (33%).

The current Labour-led coalition government has recorded its **highest rating** since coming into power in October 2017. This result eclipses its previous top rating following the Christchurch terror attacks in early 2019.

Approximately 40% of New Zealanders agree that the May 2020 budget will get New Zealand’s economy back on track in the wake of the COVID-19 pandemic. Those New Zealanders earning between $50,000 to $100,000 per annum had the **highest level of agreement** with 44%.
THE TOP ISSUES

The most important issues facing New Zealand today
In the midst of COVID-19, the Economy (47%) has emerged as the top issue facing New Zealand today.

Unemployment (41%) is the second most important issue, followed by Housing / price of housing (33%), Healthcare / hospitals (25%) and Poverty / inequality (24%).

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>The economy</td>
<td>47%</td>
</tr>
<tr>
<td>Unemployment</td>
<td>41%</td>
</tr>
<tr>
<td>Housing/price of housing</td>
<td>33%</td>
</tr>
<tr>
<td>Healthcare/hospitals</td>
<td>25%</td>
</tr>
<tr>
<td>Poverty/inequality</td>
<td>24%</td>
</tr>
<tr>
<td>Inflation/cost of living</td>
<td>23%</td>
</tr>
<tr>
<td>Climate change</td>
<td>16%</td>
</tr>
<tr>
<td>Environmental pollution / water concerns</td>
<td>13%</td>
</tr>
<tr>
<td>Drug/alcohol abuse</td>
<td>13%</td>
</tr>
<tr>
<td>Crime/law and order</td>
<td>12%</td>
</tr>
<tr>
<td>Household debt/personal debt</td>
<td>9%</td>
</tr>
<tr>
<td>Transport/public transport/infrastructure</td>
<td>7%</td>
</tr>
<tr>
<td>Petrol prices/fuel</td>
<td>6%</td>
</tr>
<tr>
<td>Education</td>
<td>6%</td>
</tr>
<tr>
<td>Immigration</td>
<td>6%</td>
</tr>
<tr>
<td>Taxation</td>
<td>5%</td>
</tr>
<tr>
<td>Race relations/racism</td>
<td>5%</td>
</tr>
<tr>
<td>Population/overpopulation</td>
<td>4%</td>
</tr>
<tr>
<td>Issues facing Maori</td>
<td>3%</td>
</tr>
<tr>
<td>Defence/foreign affairs/terrorism</td>
<td>1%</td>
</tr>
</tbody>
</table>

Q: What would you say are the three most important issues facing New Zealand today?

Base: May '20 (n=1,000)
## TOP FIVE ISSUES OVER TIME

The top 5 issues had been fairly consistent over time until May 2020 when the economy and unemployment became the top 2 issues during the COVID-19 pandemic.

<table>
<thead>
<tr>
<th>OCT 18 (n=610)</th>
<th>APR 19 (n=615)</th>
<th>NOV 19 (n=615)</th>
<th>MARCH 20 (n=610)</th>
<th>MAY 20 (n=1,000)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> Housing / Price of Housing</td>
<td>45%</td>
<td><strong>41%</strong></td>
<td>42%</td>
<td>49%</td>
</tr>
<tr>
<td><strong>2</strong> Petrol prices / Fuel</td>
<td>31%</td>
<td>Poverty / Inequality</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td><strong>3</strong> Inflation / Cost of Living</td>
<td>29%</td>
<td>Inflation / Cost of Living</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td><strong>4</strong> Healthcare / Hospitals</td>
<td>25%</td>
<td>Healthcare / Hospitals</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td><strong>5</strong> Poverty / Inequality</td>
<td>24%</td>
<td>Crime / Law</td>
<td>25%</td>
<td>23%</td>
</tr>
</tbody>
</table>

*Additional measure following the Christchurch terror attacks*

Q: What would you say are the three most important issues facing New Zealand today?

**Base:** May ’20 (n=1,000), Mar’ 20 (n=610), Nov ’19 (n=610), Apr ’19 (n=615), Oct ’18 (n=610)

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 Indicates significant increase / decrease in score compared to the previous wave
TOP 6 ISSUES OVER TIME

As we enter Level 2, the economy and unemployment are the greatest concerns for New Zealanders, heading straight to the top from a historically low position. They have even surpassed housing, which had held the position of biggest issue since measurement began.

Q: What would you say are the three most important issues facing New Zealand today?

Base: May '20 (n=1,000), Mar '20 (n=610). Nov '19 (n=610), Jul '19 (n=610), Apr '19 (n=615), Mar '19 (n=614), Oct '18 (n=610), Jul '18 (n=611), Feb '18 (n=610)

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↑↓ Indicates significant increase / decrease in score compared to the previous wave
CURRENT GOVERNMENT PERFORMANCE
Following a period of stable results across the previous 12-months, the Labour-led coalition’s performance significantly increased to a mean of 7.6 in May 2020.

This result eclipses its previous top 6.6 rating following the Christchurch terror attacks in early 2019.

Three quarters (74%) of all respondents gave the coalition government a rating of between 7-10 out of 10.

Perceptions of the current Labour-led coalition government’s performance are higher than at any other point since winning the 2017 General Election.
MANAGING THE ISSUES

The political parties perceived as most capable of managing the issues
The Labour Party is seen as the political party most capable of managing 18 of the 20 issues measured with significant increases in capability across 15 issues.

<table>
<thead>
<tr>
<th>ISSUE</th>
<th>POLITICAL PARTY</th>
<th>CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1: The Economy</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#2: Unemployment</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#3: Housing/Price of Housing</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#4: Healthcare/Hospitals</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#5: Poverty/Inequality</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#6: Inflation/Cost of Living</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#7: Climate Change</td>
<td>Green</td>
<td></td>
</tr>
<tr>
<td>#8=: Environmental Pollution/Water Concerns</td>
<td>Green</td>
<td></td>
</tr>
<tr>
<td>#8=: Drug / Alcohol Abuse</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#10: Crime/Law and Order</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#11: Household Debt/ Personal Debt</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#12: Transport/Public Transport</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#13=: Petrol Prices/Fuel</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#13=: Education</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#13=: Immigration</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#16=: Taxation</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#16=: Race Relations/Racism</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#18: Population/Overpopulation</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#19: Issues Facing Maori</td>
<td>Labour</td>
<td></td>
</tr>
<tr>
<td>#20: Defence/Foreign Affairs</td>
<td>Labour</td>
<td></td>
</tr>
</tbody>
</table>

Q: Please select the political party that you believe is most capable of managing each of the following issues:
Base: May '20 (n=1,000)
#1 ISSUE – THE ECONOMY

The National Party has lost its status as the party perceived to be most capable of dealing with the economy.

The Labour Party is seen as the political party most capable of managing the number 1 issue of the economy.

During the COVID-19 pandemic, Labour’s perceived ability to manage the economy has surpassed National’s, the party usually seen as most capable on this issue. This is similar to what happened in April ‘19 following the Christchurch terror attacks.

Additional measure following the Christchurch terror attacks

Q: Please select the political party that you believe is most capable of managing each of the following issues: The Economy

Base: Approx. n=610 per wave, except for May ‘20 (n=1,000)
Suggestions to improve economic-related issues

**Voice of New Zealanders**

- Think of new ways to boost our economy and get it up and running safely.”
  - Hawkes Bay, part-time employment, TAHI*: $100k - $120k

- Less taxation on middle income people who are basically shouldering the economy/country.”
  - Nelson/Marlborough, full-time employment, TAHI*: $120k - $140k

- Lower cost of living. Lower housing prices. Boost economy/GDP. Improve other cities other than Auckland.”
  - Auckland City, student, TAHI*: $15k–$30k

- A stimulus package would be a good way to kickstart the economy after COVID-19 crisis.”
  - Manawatu/Whanganui, full-time employment, TAHI*: $50k - $60k

- Improve travelling costs to help the economy as people would travel more if prices were cheaper.”
  - Auckland City, full-time employment, TAHI*: $60k–$80k

- Lower income tax & create more jobs for people to grow the economy.”
  - Canterbury, full-time employment, TAHI*: $60k–$80k

Q: What do you think the government needs to change or do differently to improve life in New Zealand? (open-ended question)

Base: May ’20 (n=1,000)

*TAHI = Total Annual Household Income
#2 ISSUE – UNEMPLOYMENT

The Labour Party has further strengthened their position above other parties in being perceived as capable of dealing with unemployment issues.

As seen after the Christchurch terror attacks in early 2019, Labour’s perceived capability to manage unemployment, the second most important issue currently facing New Zealand, has strengthened.

Q: Please select the political party that you believe is most capable of managing each of the following issues: Unemployment

Base: Approx. n=610 per wave, except for May ’20 (n=1,000)

Indicates significant increase / decrease in score compared to the previous wave
Suggestions to improve unemployment issues

Voice of New Zealanders

Being creative to produce more local and regional jobs.”

Stop giving so much benefit money to people who don’t work; instead get them jobs to earn the money.”

Create new jobs to help the country become less reliant on imports and foreign tourists.”

Decrease unemployment and allow more businesses to open.”

Due to COVID-19 there is going to be a lot of unemployment and a lot more people on welfare benefits; these benefits need to be raised otherwise there are going to be a lot of families living in poverty.”

They need to prioritise employment and try to establish the living wage as the minimum wage for all New Zealanders.”

Ensure the gap between rich and poor is narrow by raising the Minimum wage to the Living wage.”

Q: What do you think the government needs to change or do differently to improve life in New Zealand? (open-ended question)

Base: May '20 (n=1,000)
#4 ISSUE – HEALTHCARE / HOSPITALS

The Labour Party is even more strongly perceived as most capable of dealing with healthcare issues.

Healthcare / hospitals has been a consistently highly rated top-4 issue since February 2018.

New Zealanders aged over 65 years expressed significantly higher concerns regarding the issue of healthcare / hospitals in May 2020.

It is interesting that even as we move into Alert Level 2 of the COVID-19 crisis, that healthcare is less of an issue for New Zealanders than the economy, unemployment and housing.

Additional measure following the Christchurch terror attacks

Q: Please select the political party that you believe is most capable of managing each of the following issues: Housing

Base: Approx. n=610 per wave, except for May '20 (n=1,000)

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Indicates significant increase / decrease in score compared to the previous wave
Suggestions to improve **healthcare issues**

*Voice of New Zealanders*

- **To prioritise even more money into better healthcare.**
  - Manawatu/Whanganui, full-time employment, TAHI*: $50k–$60k

- **Put more funding to healthcare.**
  - Wellington, part-time employment, TAHI*: $50k–$60k

- **To integrate a free healthcare system; have rent caps indicative of income.**
  - Canterbury, self-employed, TAHI*: $50k–$60k

- **Fix hospitals and overall health administration.**
  - Auckland City, Retired, TAHI*: $30k–$50k

- **Change the healthcare system.**
  - Waikato, self-employment, TAHI*: Over $50k -$60k

- **Fund health care.**
  - Auckland City, full-time employment, TAHI*: $100k–$120k

- **I think they need to look at better funding for the health system; midwifes and education.**
  - Wellington, self-employed, TAHI*: $100k–$120k

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**Q:** What do you think the government needs to change or do differently to improve life in New Zealand? (open-ended question)

**Base:** May '20 (n=1,000)

*TAHI = Total Annual Household Income*
COMPARING NZ’S ISSUES TO AUSTRALIA’S
The economy and unemployment dominate the top two issues in Australia, just as they do in New Zealand in May 2020. However, in April 2020, healthcare / hospitals was Australia’s top issue at 55%.

During late 2019, the environment took over as the top issue facing Australians, however this has decreased during COVID-times as economic and health issues take precedence.
LEVEL OF AGREEMENT: BUDGET 2020

To what extent do you agree or disagree with the following statement: The budget announced on Thursday 14th May will get our economy back on the right track?

40% of New Zealanders agreed that the May ’20 budget will get New Zealand’s economy back on the right track. Only 17% of respondents disagreed with this statement about the budget.

Somewhat surprisingly there were very few differences between results when analysed by age, gender, income and education level.

Q: To what extent do you agree or disagree with the following statement: The budget announced on Thursday 14th May will get our economy back on the right track?

Base: May ‘20 (n=1,000)

40% Agree
32% Neither Agree/Disagree
17% Disagree
11% Don’t Know
QUALITY OF LIFE
QUALITY OF LIFE: MAY 2020

Despite the major changes COVID-19 has brought to the lives of New Zealanders, there is no significant impact to their current quality of life

Half (49%) of New Zealanders agree that their current quality of life is very good. When asked whether they expect their overall quality of life to be better in 5 years’ time than it is now, 46% of New Zealanders agree.

Although these questions were asked during the early days of Alert Level 2 of the COVID-19 pandemic, the results are similar to those seen in October last year.

Q: To what extent do you agree or disagree with each of the following statements? “My current quality of life is very good” / “I expect my overall quality of life to be much better in 5 years than it is now.”

Base: May ‘20 (n=1,000), Oct ‘19 (n=610), Jul ‘19 (n=610) – Age: 18–74 years

My current quality of life is very good

Mean: 4.7

<table>
<thead>
<tr>
<th></th>
<th>Oct ’19</th>
<th>May ’20</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Strongly disagree</td>
<td>12%</td>
<td>28%</td>
</tr>
<tr>
<td>2</td>
<td>9%</td>
<td>18%</td>
</tr>
<tr>
<td>3</td>
<td>22%</td>
<td>16%</td>
</tr>
<tr>
<td>4 - Strongly agree</td>
<td>8%</td>
<td>14%</td>
</tr>
</tbody>
</table>

I expect my overall quality of life to be better in 5 years than it is now

Mean: 4.4

<table>
<thead>
<tr>
<th></th>
<th>Oct ’19</th>
<th>May ’20</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Strongly disagree</td>
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</tr>
<tr>
<td>2</td>
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<td>21%</td>
</tr>
<tr>
<td>3</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>4 - Strongly agree</td>
<td>8%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Indicates significant increase / decrease in score compared to the previous wave.

GAME CHANGERS
Reported quality of life among New Zealanders improves as income increases. Those with the lowest incomes have the lowest quality of life and those in the highest income group report the highest quality of life. The same pattern applies to the future quality of life.

Those aged under 35 years are more optimistic about their future quality of life than older age groups.

Q: To what extent do you agree or disagree with each of the following statements? “My current quality of life is very good”/ “I expect my overall quality of life to be much better in 5 years than it is now.”

Base: May ’20 (n=1,000)

<table>
<thead>
<tr>
<th>Age</th>
<th>Gender</th>
<th>Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 35 years</td>
<td>4.4</td>
<td>4.1</td>
</tr>
<tr>
<td>35–49 years</td>
<td>4.3</td>
<td>4.4</td>
</tr>
<tr>
<td>50–64 years</td>
<td>4.5</td>
<td>4.8</td>
</tr>
<tr>
<td>65–74 years</td>
<td>4.6</td>
<td>4.4</td>
</tr>
</tbody>
</table>

Present quality of life = 4.3
Future quality of life = 4.4
SAMPLE DEMOGRAPHICS – MAY ‘20

1,000 respondents were interviewed online in May 2020 using the Dynata online panel

- **Gender Distribution:**
  - 49% Male
  - 51% Female

- **Highest Education Completed:**
  - 36% Level 1-4
  - 39% Level 5-7
  - 19% Level 8-10
  - 6% Don’t know

- **Type of Area Live In:**
  - 45% In the suburbs of a large city
  - 17% In a rural area
  - 12% In a large city
  - 12% In, or right outside, a medium sized city
  - 1% In, or right outside, a small city
  - 1% None of these

- **Employment Status:**
  - 47% Full-time
  - 10% Retired
  - 15% Part-time
  - 7% Not in paid work & not seeking work
  - 9% Self-employed
  - 5% Student
  - 7% Not in paid work but seeking work

The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points.

Results are weighted by age, gender and region to ensure they reflect the New Zealand Population.

SAMPLE SIZES OVER TIME: May ’20 (n=1,000), Mar ’20 (n=610), Nov ’19 (n=610), Jul ’19 (n=610), Apr ’19 (n=615), Mar ’19 (n=614), Oct ’18 (n=610), Jul ’18 (n=611), Feb ’18 (n=610)

*Level 1-4 (NCEA level 1-3; NZ school certificate; national certificate)
Level 5-7 (graduate certificates and diplomas; bachelor’s degree)
Level 8-10 (postgraduate certificates/degree; Master’s degree; Doctoral degree)
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“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

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So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.