

# INFRASTRUCTURE IN NEW ZEALAND

**An Ipsos Global Advisor Survey  
January 2020**

**GAME CHANGERS**





# INFRASTRUCTURE SURVEY

## Background Information

A total of 561 New Zealanders aged 18–74 answered questions about infrastructure in our November Global Advisor survey which ran from 1 to 12 November 2019.

This survey explored New Zealanders' perceptions of the current infrastructure in New Zealand. Additionally, respondents were asked which types of infrastructure they believe the government should prioritise investment in. In this survey, infrastructure was defined as *things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other forms of communications*.

New Zealand data is presented alongside international data collected from 26 July to 9 August 2019, from a total of 19,516 interviews conducted with participants from 28 other countries.

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.



# INFRASTRUCTURE IN NEW ZEALAND

*The Media Context: What was making New Zealand news during the survey fieldwork?*

politics

Public housing waitlist nears 14,000 with record-high

stuff.co.nz – 1 Nov 2019

Auckland's rail network being reviewed to see if it can cope with population growth

nzherald.co.nz – 9 Nov 2019

Government gives go-ahead for major repairs on Northland roads this summer

nzherald.co.nz – 2 Nov 2019

BUSINESS / ENVIRONMENT

Mercury NZ pours in \$208m extra on New Zealand's largest wind farm

rnz.co.nz – 12 Nov 2019

# KEY FINDINGS



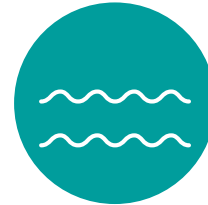
46% of New Zealanders are **satisfied with the national infrastructure.**



55% of New Zealanders **agree that we are not doing enough** to meet our infrastructure needs.



Only 29% of New Zealanders are satisfied with the **new housing supply** and 55% believe this should be the priority for investment.



44% of New Zealanders rate the current quality of **New Zealand's defence against rising sea levels** as **fairly or very poor.**

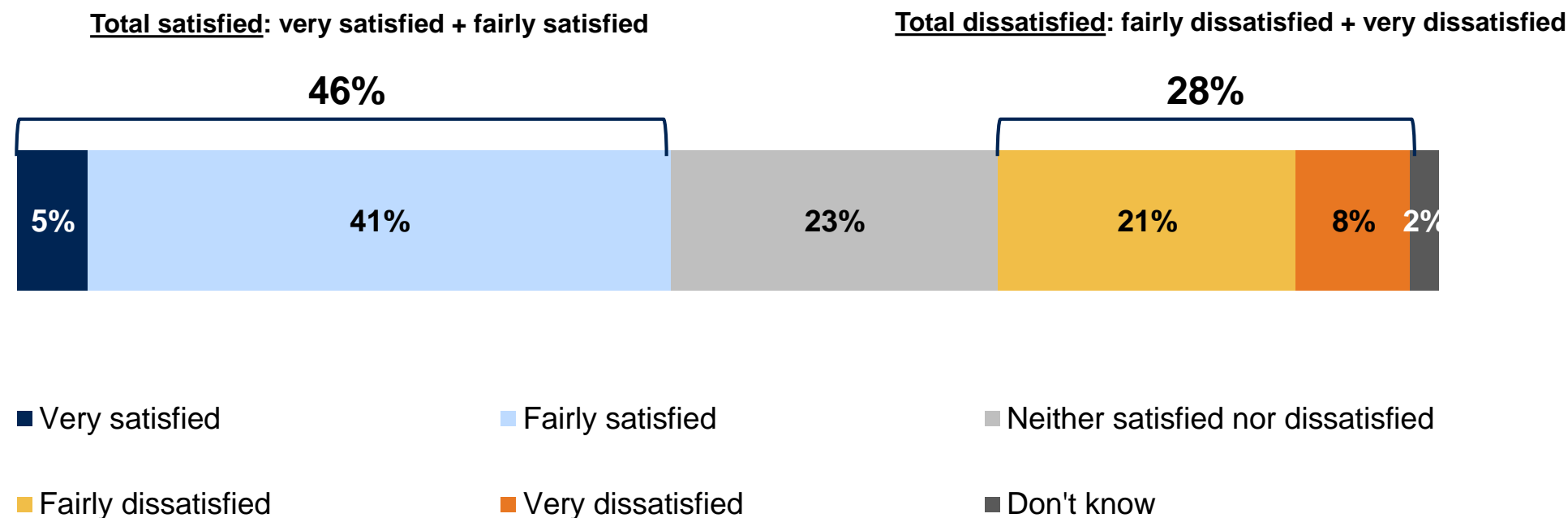


# CURRENT VIEWS OF NEW ZEALAND INFRASTRUCTURE



# SATISFACTION WITH NZ'S NATIONAL INFRASTRUCTURE

*Overall, 46% of New Zealanders are satisfied with the national infrastructure; 23% remain neutral & 28% are dissatisfied*



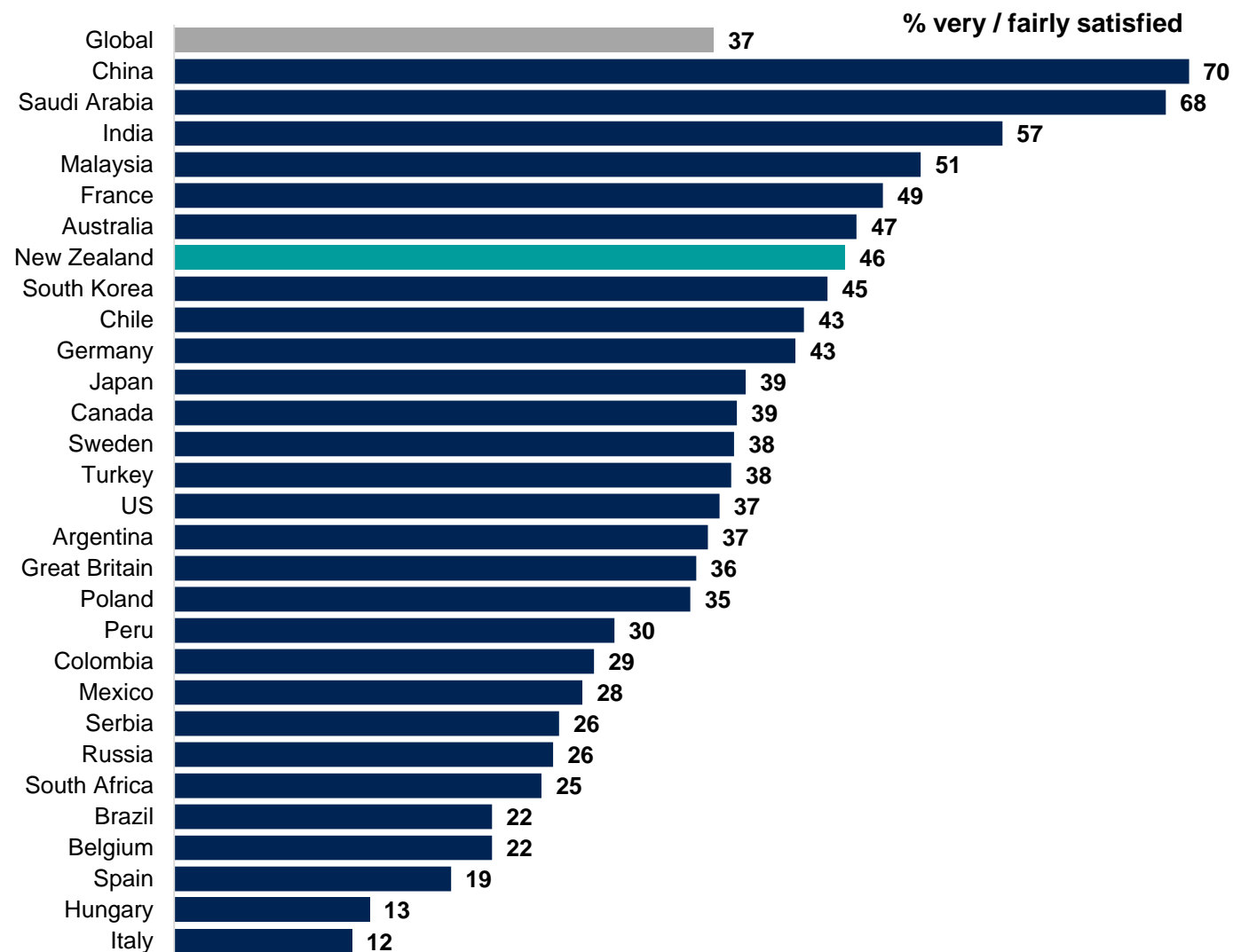
**Q:** Overall, how satisfied or dissatisfied are you with New Zealand's national infrastructure?

**Base:** NZ sample – Nov '19 (n=561)

# SATISFACTION WITH NATIONAL INFRASTRUCTURE

New Zealander's satisfaction with national infrastructure (46%) is very similar to that of Australia (47%) but above the global average of 37%.

New Zealanders' satisfaction levels were relatively high compared to the larger Western economies of Canada (39%), the United States (37%) and Great Britain (36%).

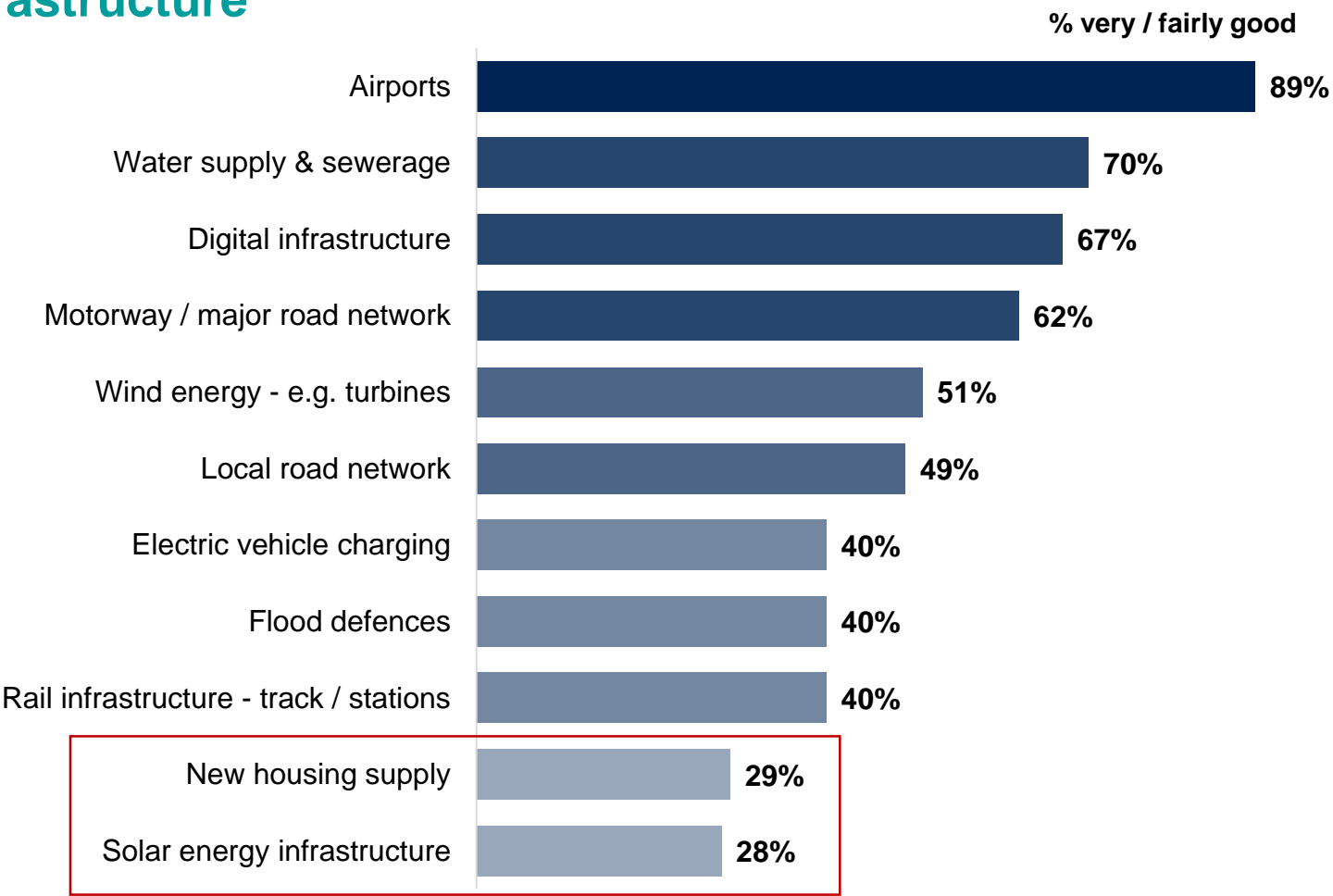


Q: Overall, how satisfied are you with [COUNTRY'S] national infrastructure?

Base: n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)

# VIEWS OF DIFFERENT TYPES OF INFRASTRUCTURE

*New Zealanders are notably less satisfied with the country's new housing supply & solar energy than other types of infrastructure*



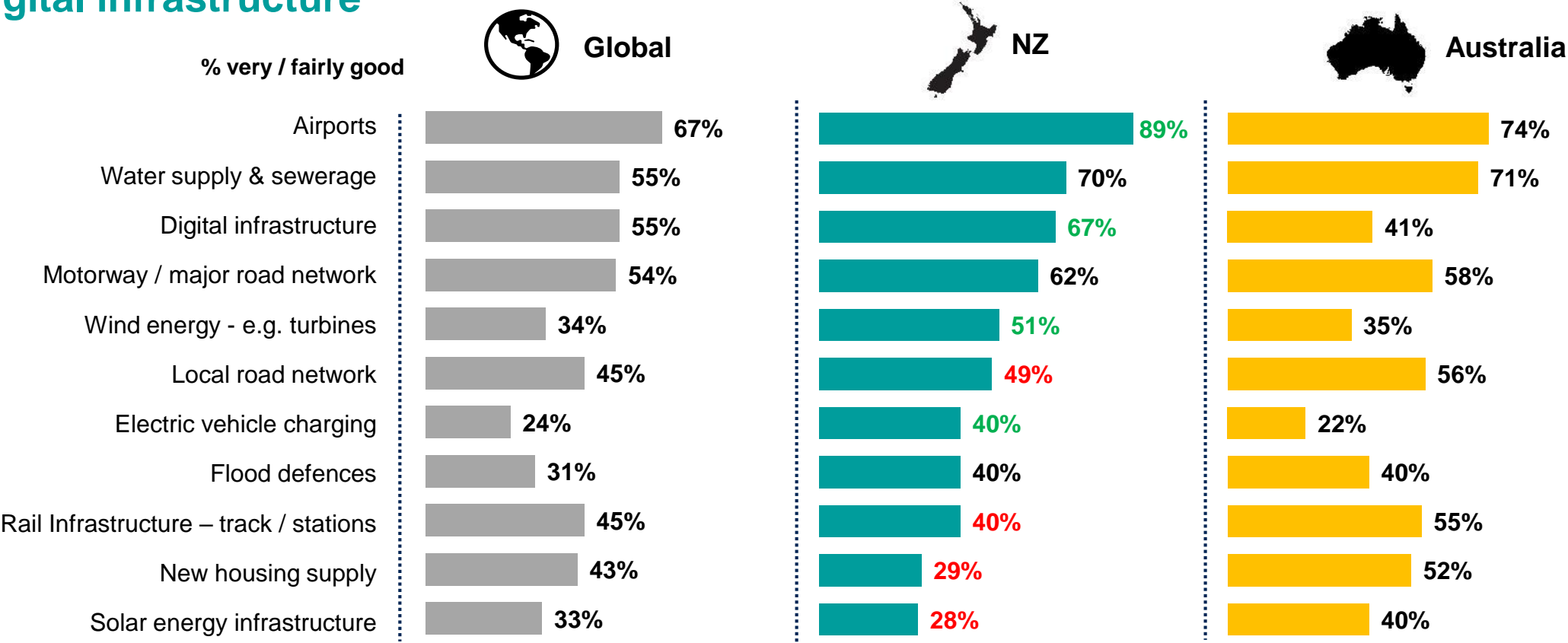
**Q:** These next questions are about different types of infrastructure in New Zealand. Please indicate how you would rate the current quality of each one in New Zealand.

**Base:** NZ sample – Nov '19 (n=561)



# VIEWS OF DIFFERENT TYPES OF INFRASTRUCTURE

*New Zealanders are less satisfied than Australians with new housing supply, rail infrastructure & local road network; but happier with electric vehicle charging, airports & digital infrastructure*



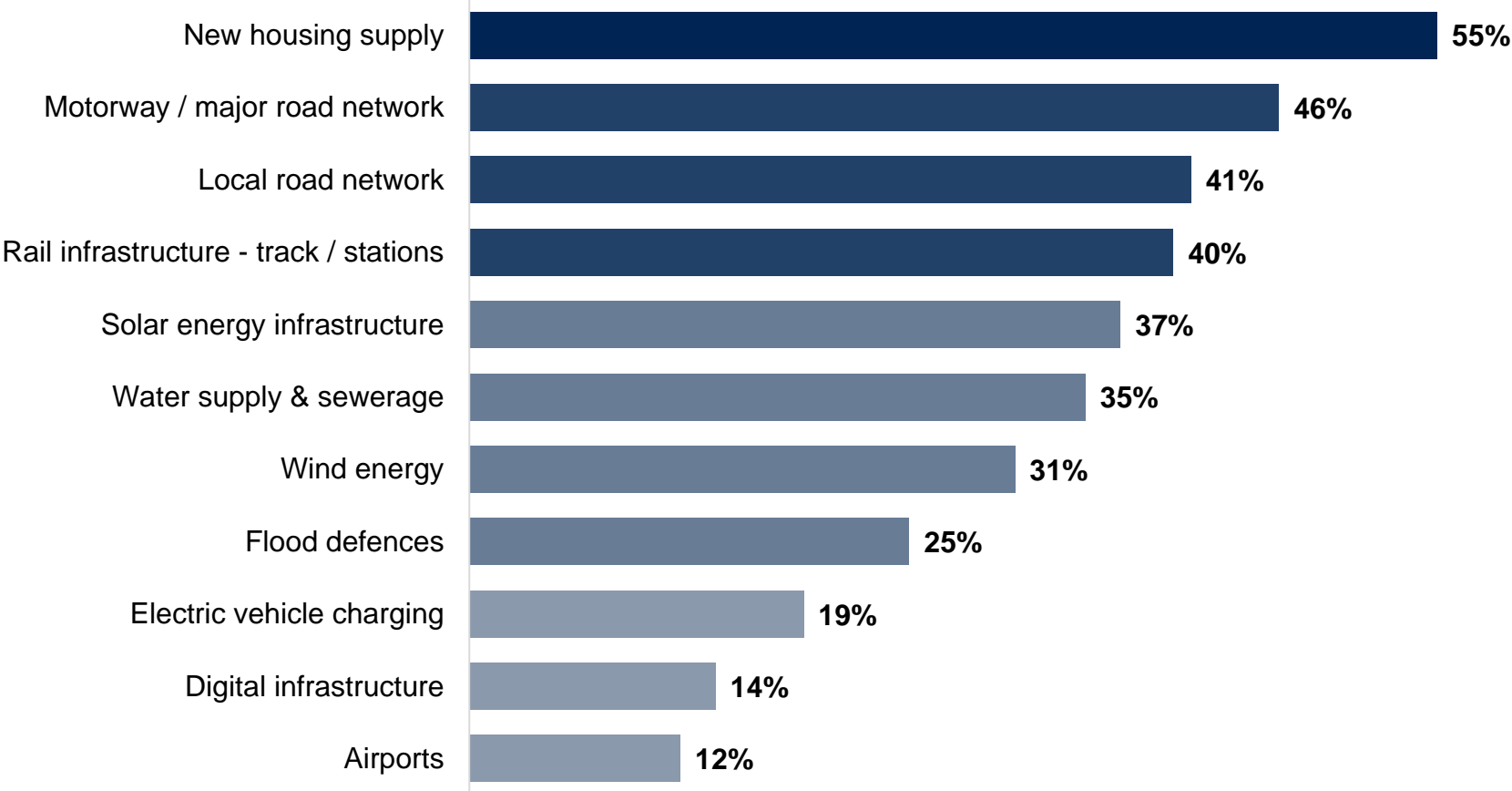
**Q:** We now want you to think about [COUNTRY'S] infrastructure. Overall, how satisfied are you with [COUNTRY'S] national infrastructure?

**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561); Australian sample (n=1,002)

# WHAT NEW ZEALANDERS WANT PRIORITISED

55% of New Zealanders believe that investing in new housing supply should be the Government's top priority

After *housing*, New Zealanders want *transport-related* infrastructure such as road and rail networks to be prioritised.



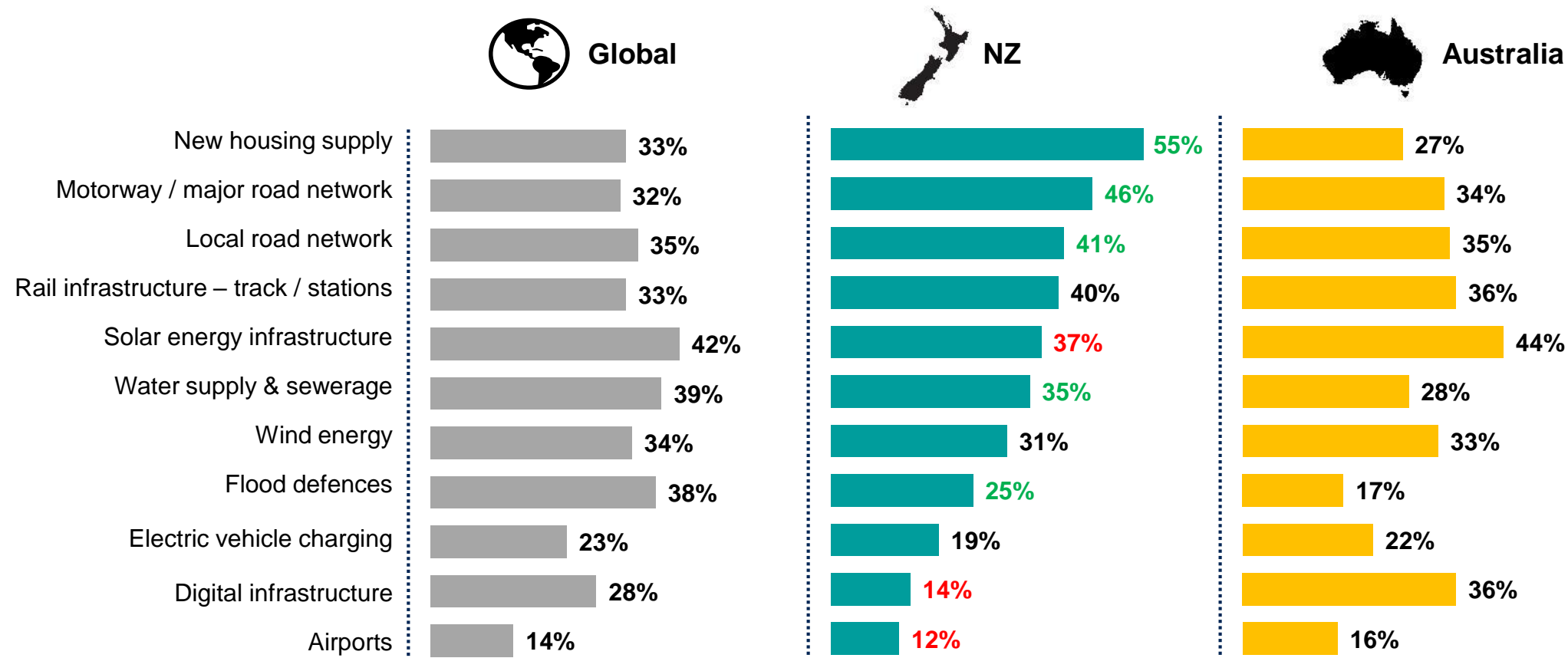
Q: Which of these types of infrastructure, if any, do you think should be made a priority for investment for New Zealand? (Respondents were allowed to select more than one option.)

Base: NZ sample – Nov '19 (n=561)



# PRIORITISING INFRASTRUCTURE

*New Zealanders are significantly more likely than Australians to say that new housing supply, road networks & water-related infrastructure should be prioritised*



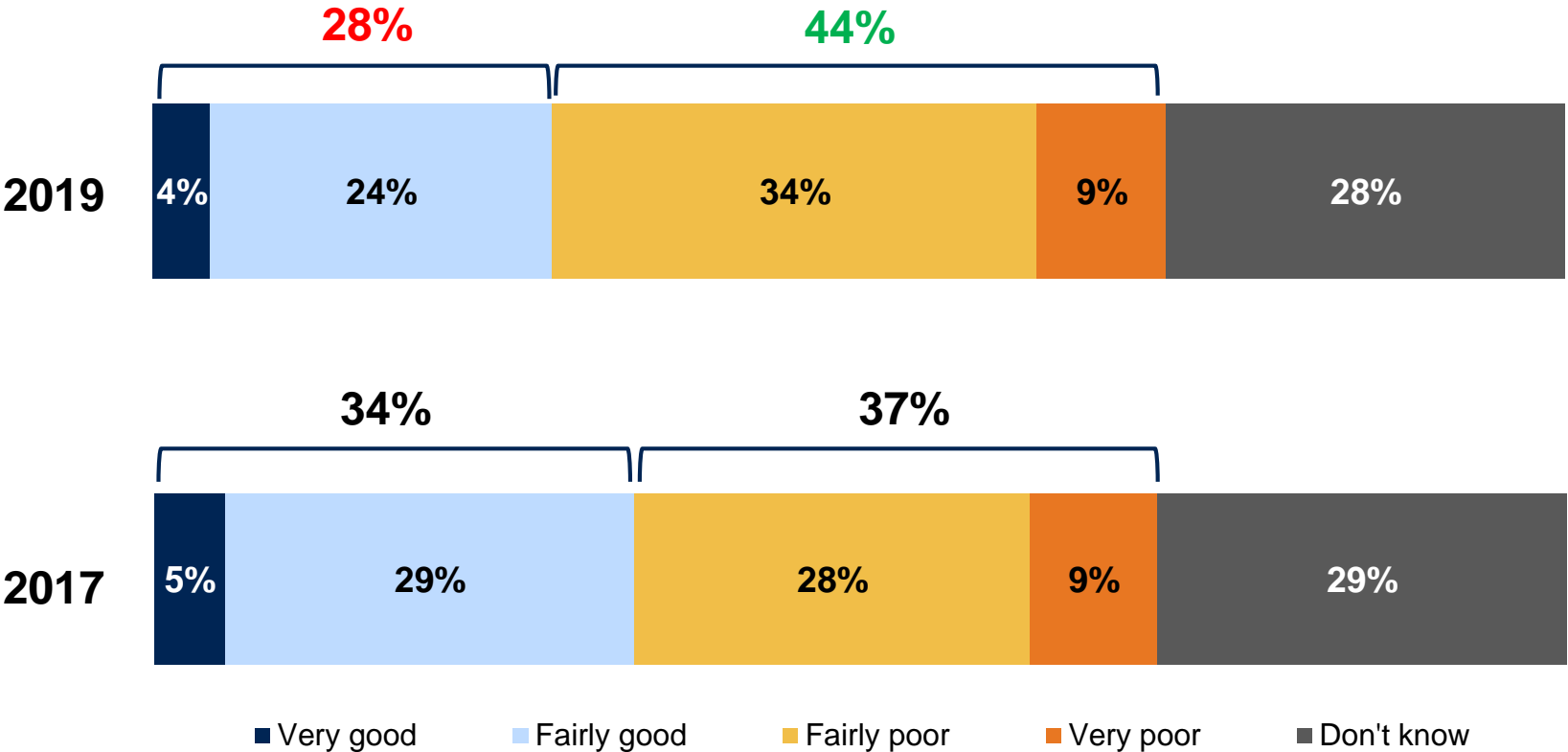
Q: Which of these types of infrastructure, if any, do you think should be made a priority for investment for New Zealand? (Respondents were allowed to select more than one option.)

Base: n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov ‘19 (n=561); Australian sample (n=1,002)

# DEFENCES AGAINST RISING SEA LEVELS

Against a backdrop of increasing concern about climate change, New Zealanders were significantly less likely to be positive about infrastructure designed to defend against rising sea levels in 2019 than in 2017

Since 2017, New Zealanders' dissatisfaction with the quality of defences against rising sea levels has increased.



Green / red indicates significantly higher / lower score vs. 2017

Q: How would you rate the current quality of New Zealand's defences against rising sea levels?

Base: NZ sample – Sep '17 (n=500), Nov '19 (n=561)



# CURRENT INVESTMENT IN INFRASTRUCTURE

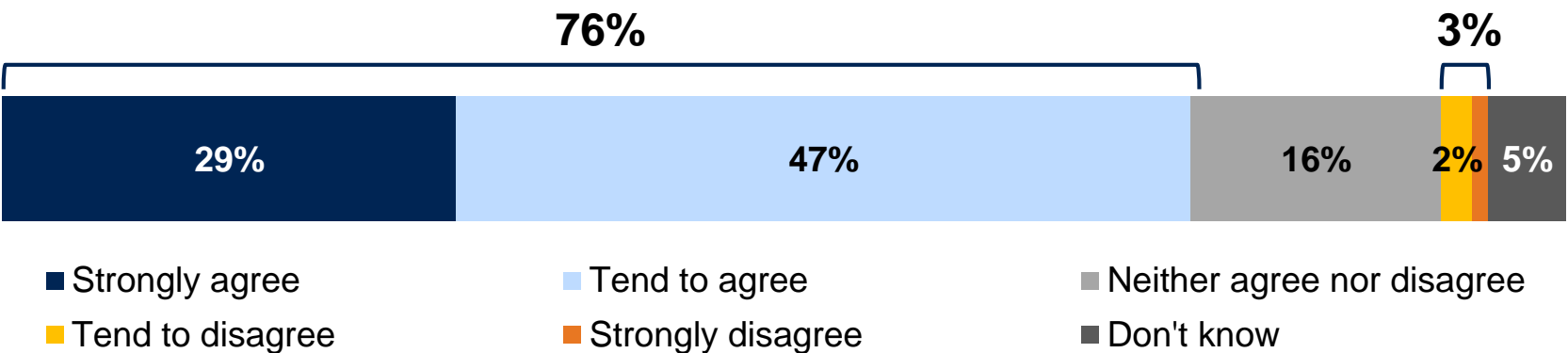
# INVESTMENT IN INFRASTRUCTURE

*The majority of New Zealanders (76%) support investment in infrastructure*

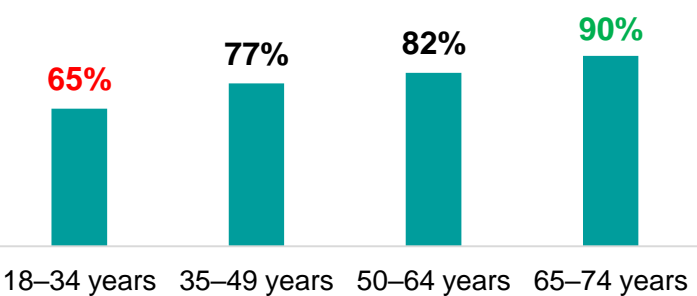


Investing in infrastructure is vital to New Zealand's future economic growth.

76% of New Zealanders agree that investing in infrastructure is key to ensuring the country's future economic growth. Those aged 65+ are significantly more likely to support investment.



## Response by different age groups



Supporting investment in infrastructure increases with age.

% total agree (strongly agree + tend to agree)

Green / red indicates significantly higher / lower score vs. total

Q: To what extent do you agree or disagree...? Investing in infrastructure is vital to New Zealand's future economic growth.

Base: NZ sample – Nov '19 (n=561)



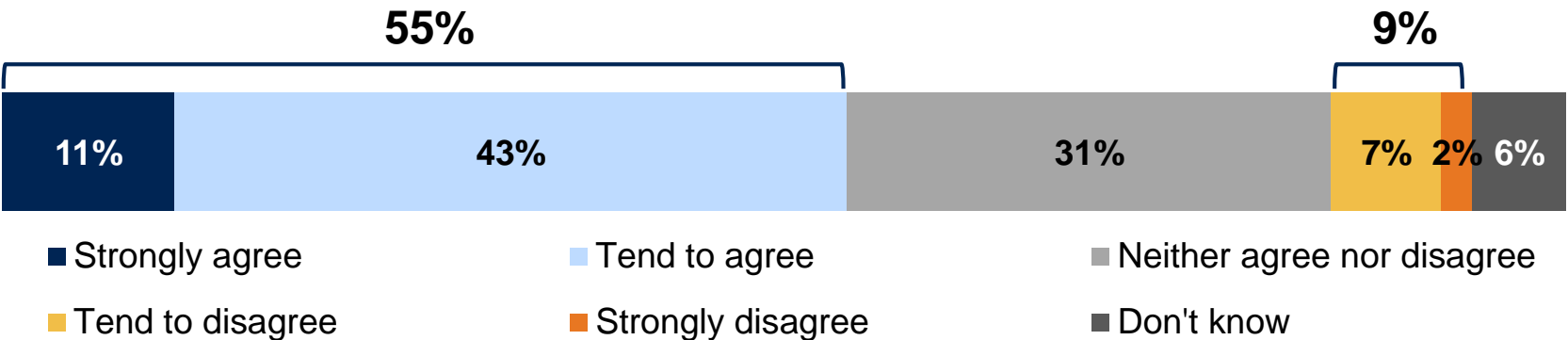
# IS NEW ZEALAND DOING ENOUGH?

Only 9% of New Zealanders believe that we are doing enough to meet our infrastructure needs

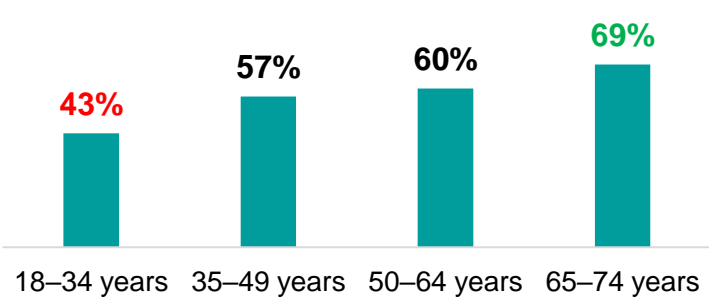


As a country we are not doing enough to meet our infrastructure needs.

Over half of New Zealanders think more could be done to meet the country's infrastructure needs.



## Age group differences



While 69% of New Zealanders aged 65–74 agree that we are not doing enough to meet infrastructure needs, fewer than half of those under 35 years agree.

% total agree (strongly agree + tend to agree)

Green / red indicates significantly higher / lower score vs. total

Q: To what extent do you agree or disagree...? As a country we are not doing enough to meet our infrastructure needs.

Base: NZ sample – Nov '19 (n=561)

# LOCAL PERCEPTION OF INFRASTRUCTURE SHARE

Only 24% of New Zealanders agree that their area receives enough investment in infrastructure



My local area gets its fair share of New Zealand's investment in infrastructure.

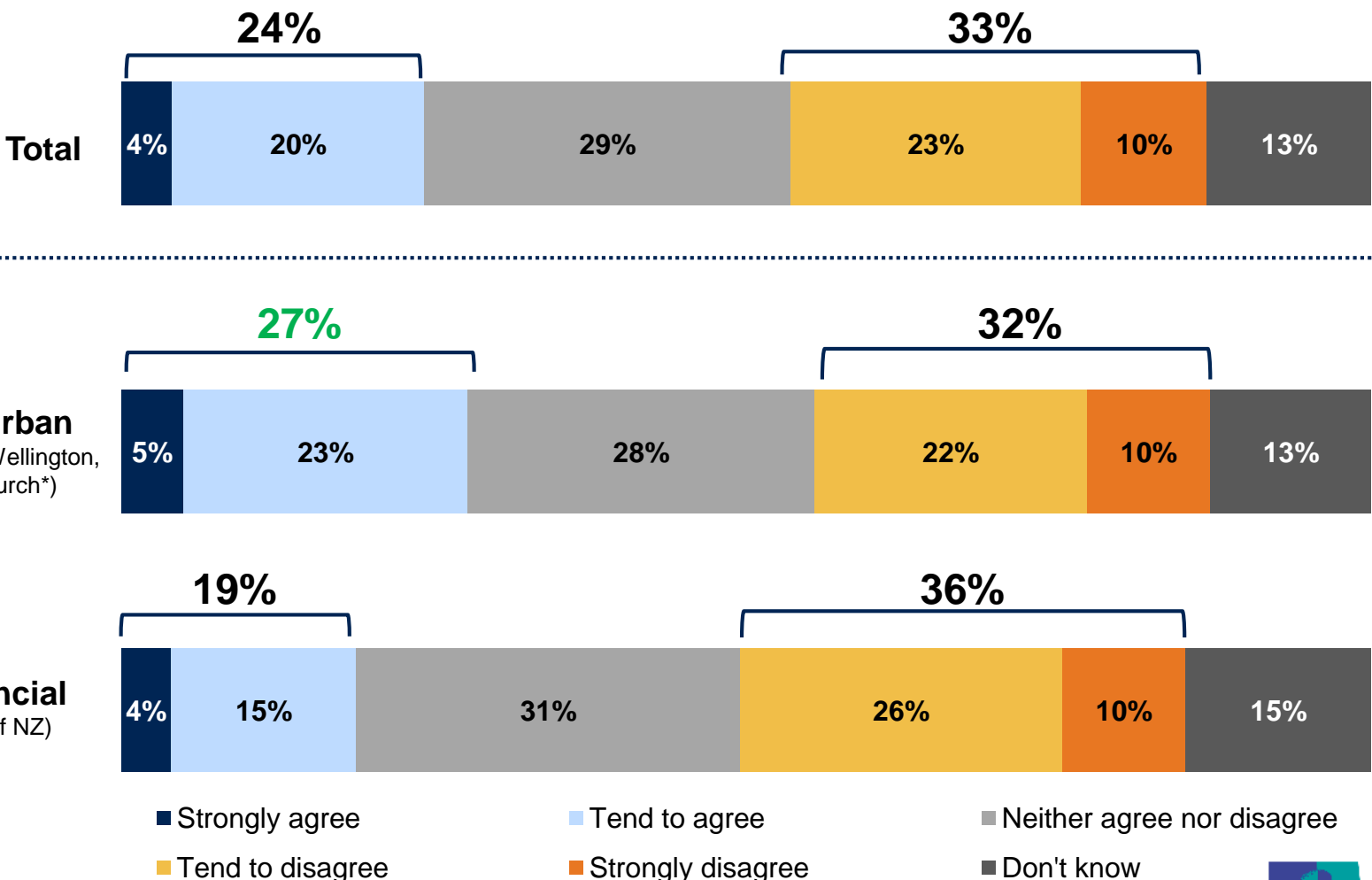
New Zealanders living outside the three main urban centres are less likely to feel that their local areas receive enough investment in infrastructure – just 19% agree their area gets enough compared to 27% of those in the bigger cities.



Q: To what extent do you agree or disagree...? My local area gets its fair share of New Zealand's investment in infrastructure.

Base: NZ sample – Nov '19 (n=561); Main Urban (n=335); Provincial (n=226)

Note: \* some of those recorded as Christchurch would have been in the surrounding Canterbury area



Green / red indicates significantly higher / lower score vs. rest of NZ





# APPENDIX

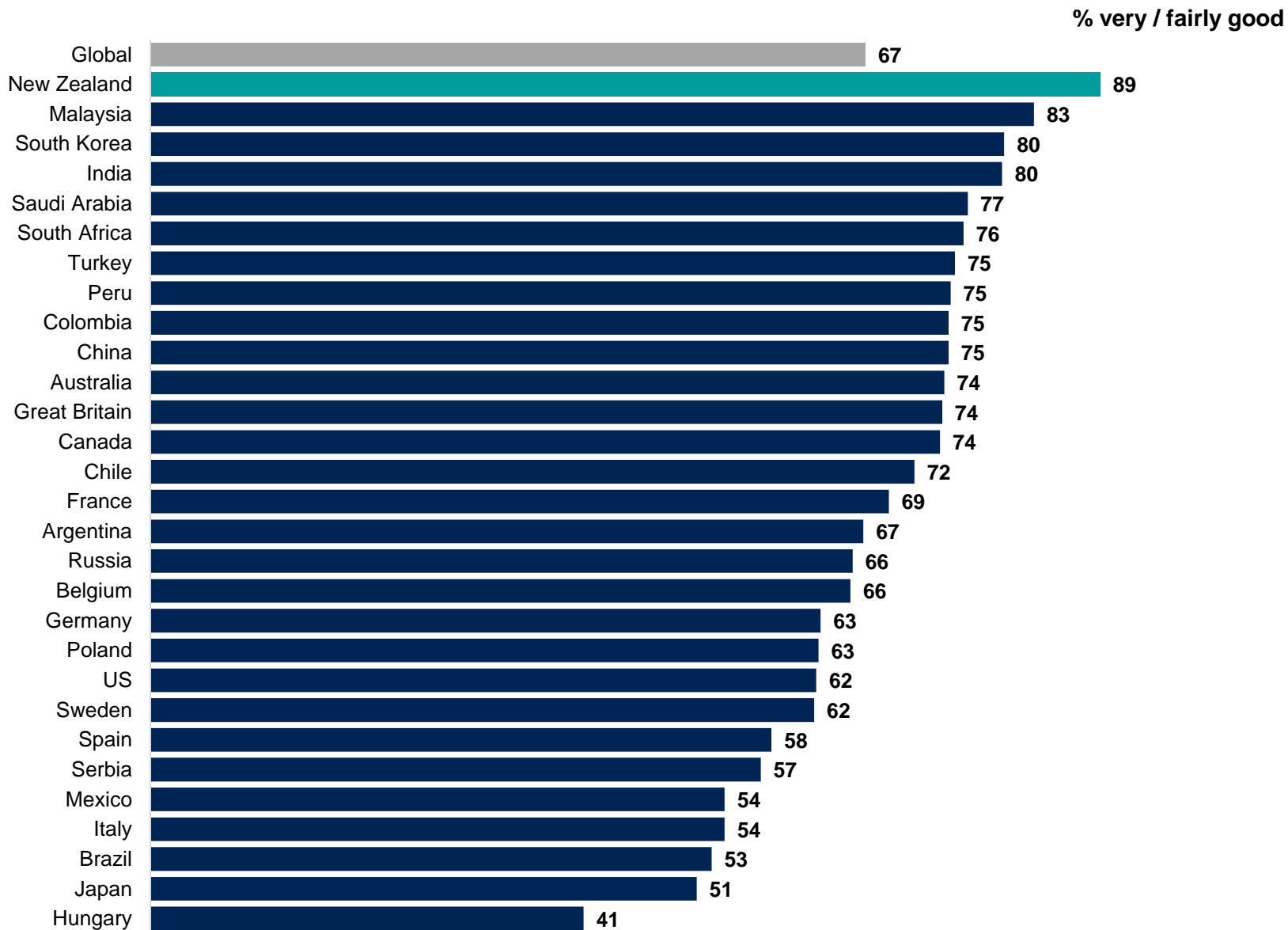




Please indicate how you would rate the current quality of each one in [country].

## Airports

Of all countries surveyed, New Zealanders show the greatest level of satisfaction for their current airport infrastructure (89% vs. 67% global).



**Q:** These next questions are about different types of infrastructure. Please indicate how good or poor you rate the current quality of each one in [COUNTRY].

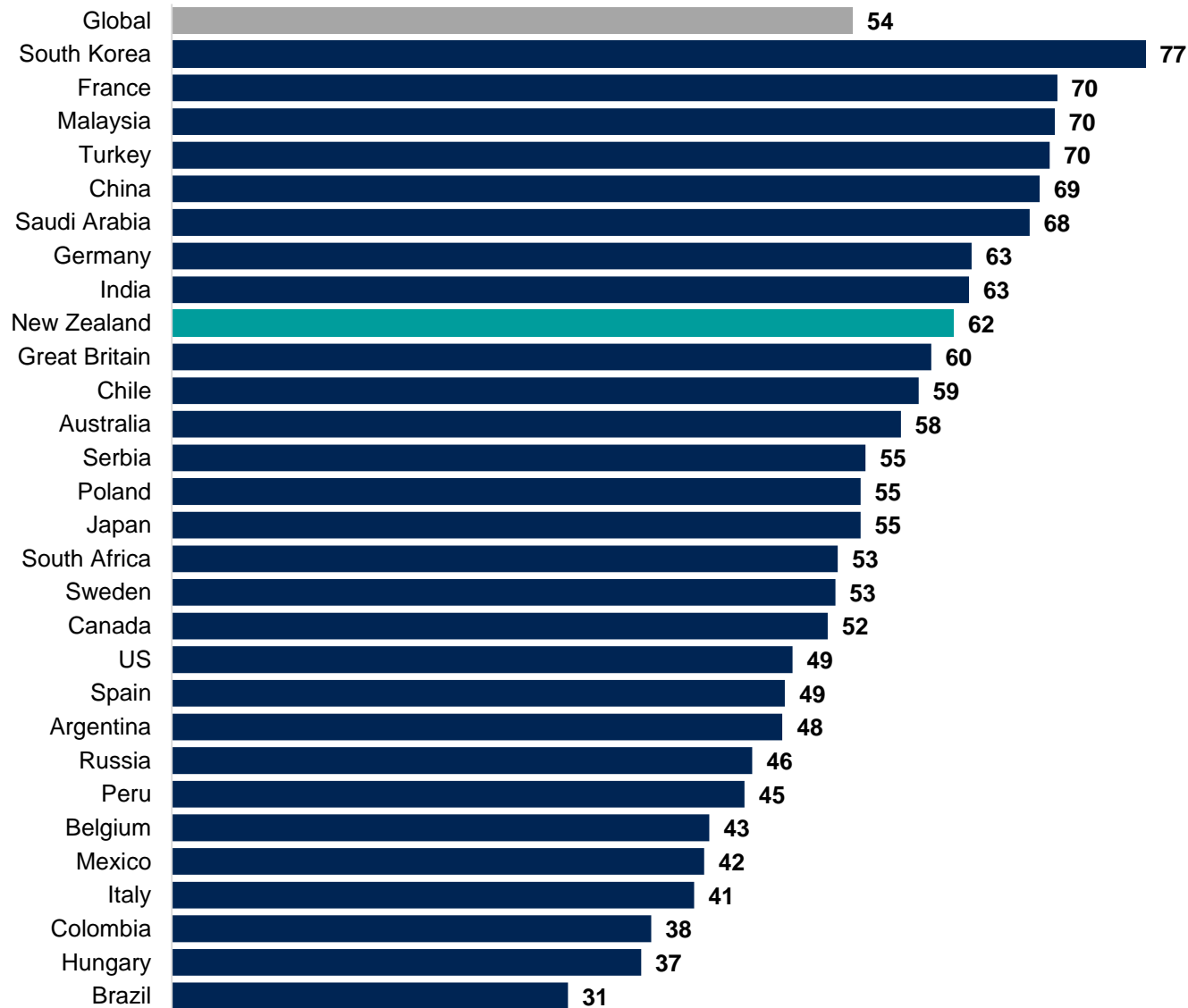
**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)



Please indicate how you would rate the current quality of each one in [country].

## Motorways

62% of respondents perceive the quality of New Zealand's motorways and major road networks to be either very or fairly good. This is higher than the global average of 54%.



**Q:** These next questions are about different types of infrastructure. Please indicate how good or poor you rate the current quality of each one in [COUNTRY].

**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)



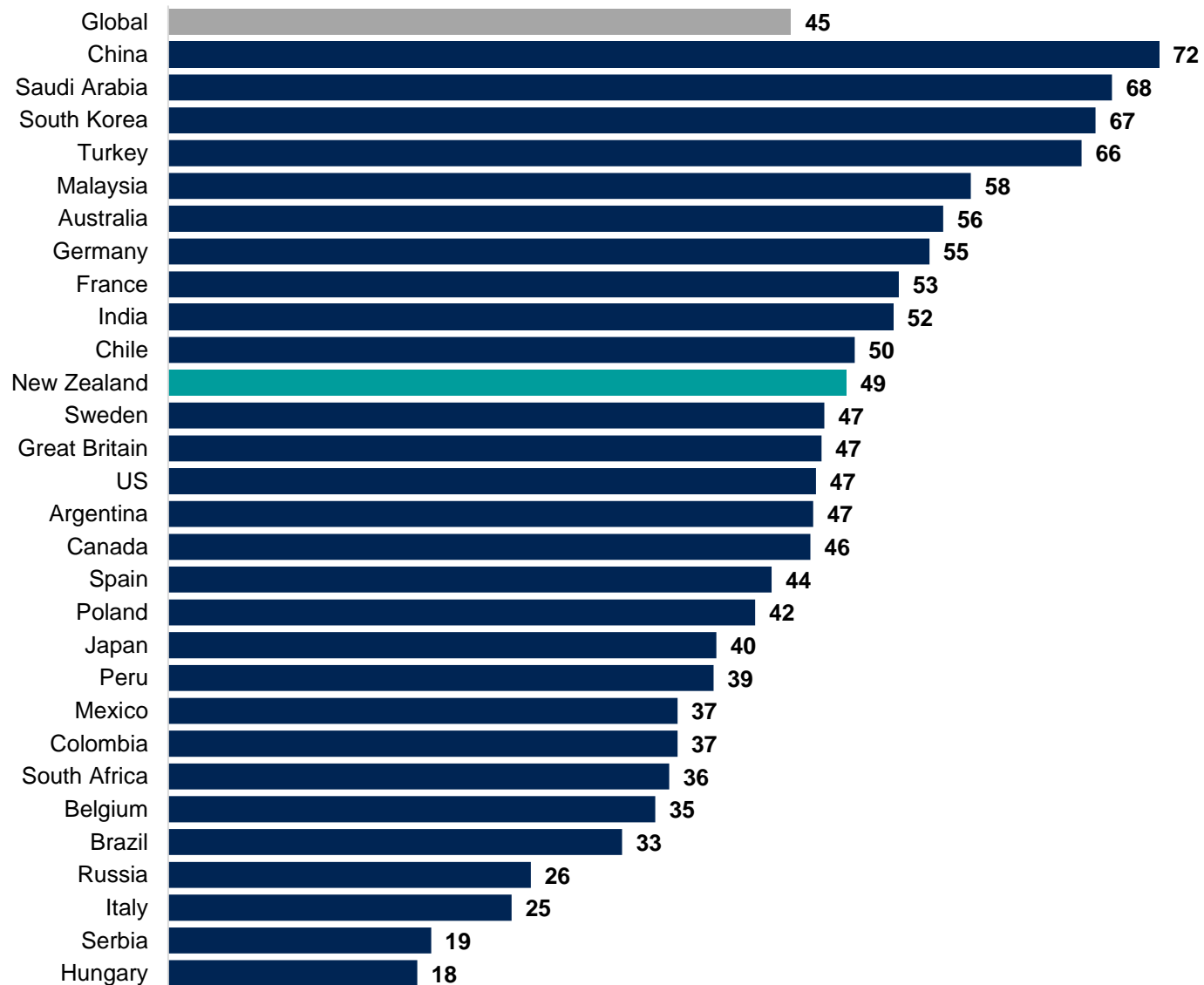
Please indicate how you would rate the current quality of each one in [country].

## Local Roads

New Zealanders' satisfaction with local road networks (49%) is slightly higher than the global average of 45%.



% very / fairly good



**Q:** These next questions are about different types of infrastructure. Please indicate how good or poor you rate the current quality of each one in [COUNTRY].

**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)



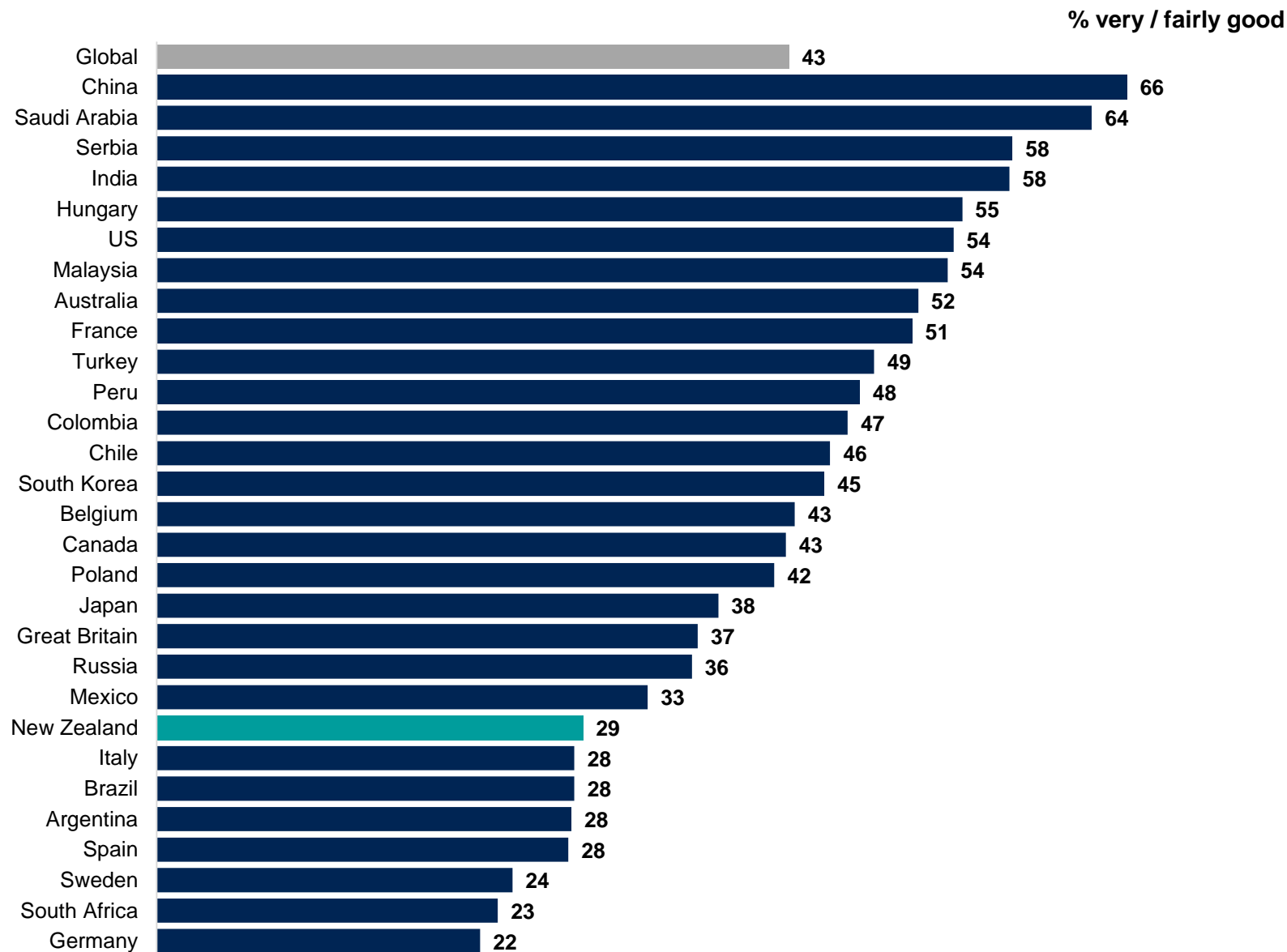


Please indicate how you would rate the current quality of each one in [country].

## New Housing Supply

Only 29% of New Zealanders are happy with the current quality of new housing supply, lower than the global average (43%).

Over half (52%) of Australian respondents feel their housing supply is of good quality.



**Q:** These next questions are about different types of infrastructure. Please indicate how good or poor you rate the current quality of each one in [COUNTRY].

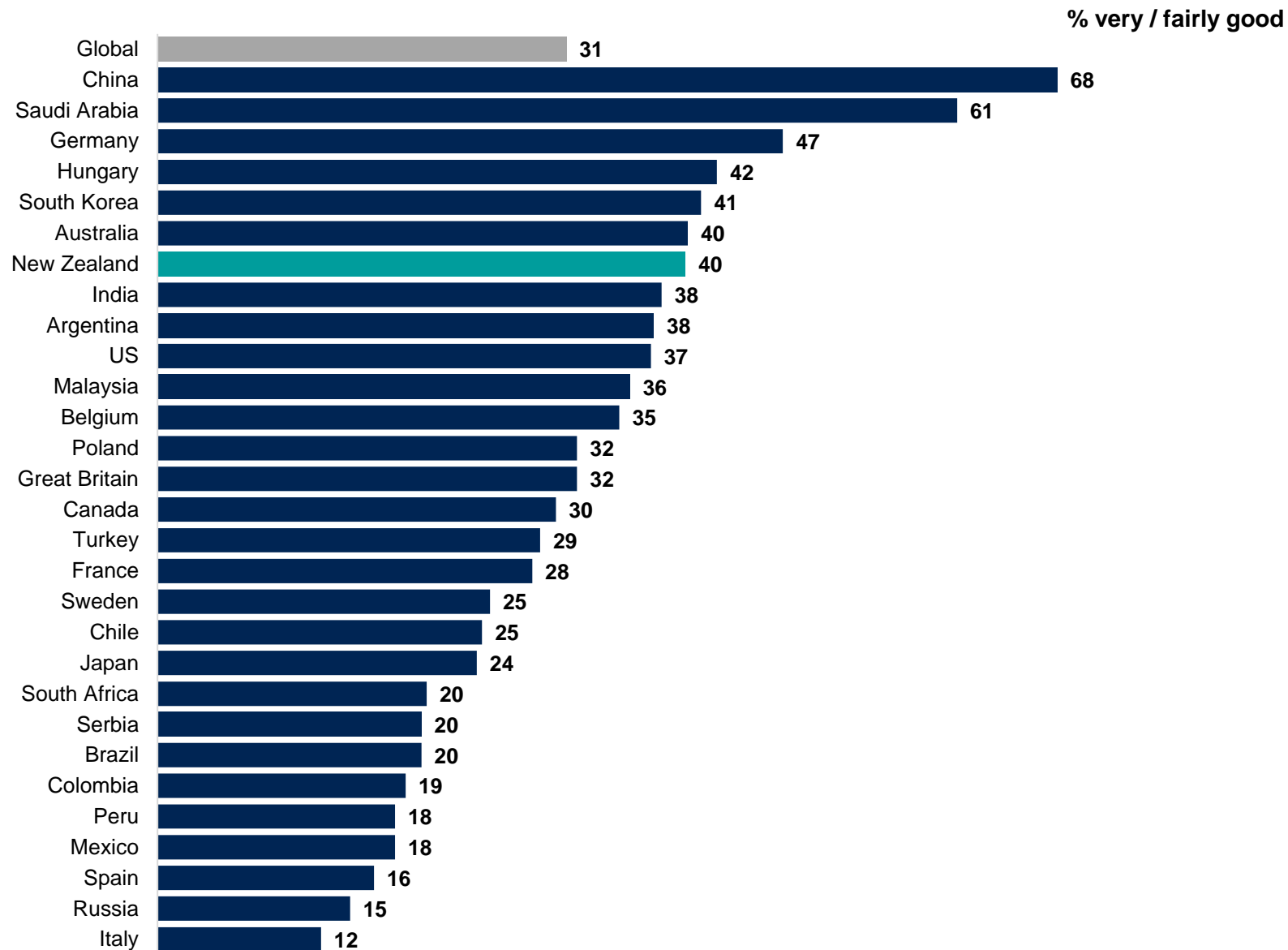
**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)



Please indicate how you would rate the current quality of each one in [country].

## Flood Defences

New Zealanders and Australians are equally satisfied (40%) with their respective country's flood defences, a result above the global average of 31%.



**Q:** These next questions are about different types of infrastructure. Please indicate how good or poor you rate the current quality of each one in [COUNTRY].

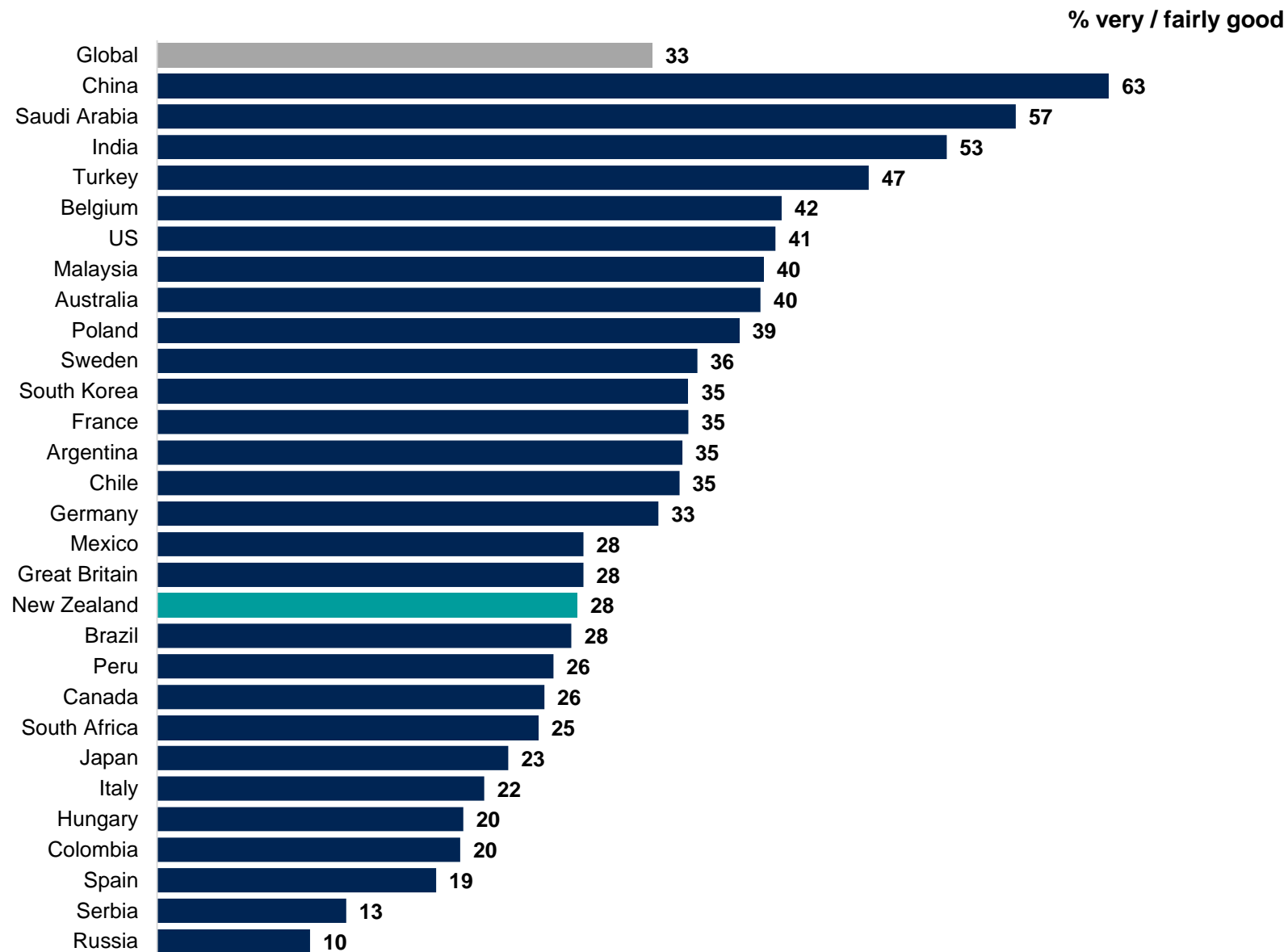
**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)



Please indicate how you would rate the current quality of each one in [country].

## Solar Energy

New Zealanders feel more needs to be done regarding solar energy infrastructure, as only 28% are satisfied with the current infrastructure. At 40%, Australians are much more satisfied with the quality of this renewable energy source.



**Q:** These next questions are about different types of infrastructure. Please indicate how good or poor you rate the current quality of each one in [COUNTRY].

**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)

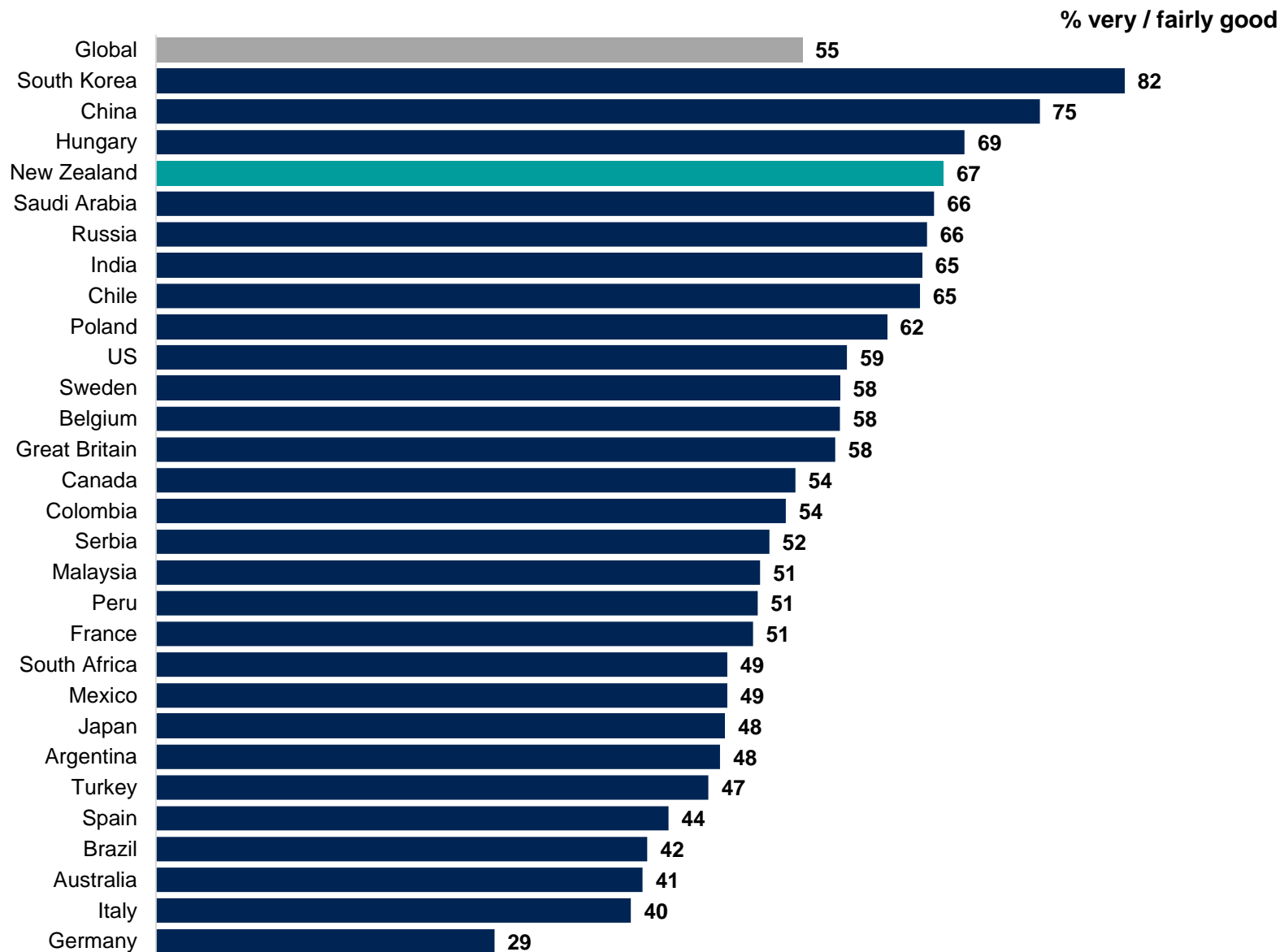




Please indicate how you would rate the current quality of each one in [country].

## Digital Infrastructure\*

New Zealanders are amongst the most satisfied in the world with their digital infrastructure (67%). Only Hungary (69%), China (75%) and South Korea (82%) ranked higher.



**Q:** These next questions are about different types of infrastructure. Please indicate how good or poor you rate the current quality of each one in [COUNTRY].

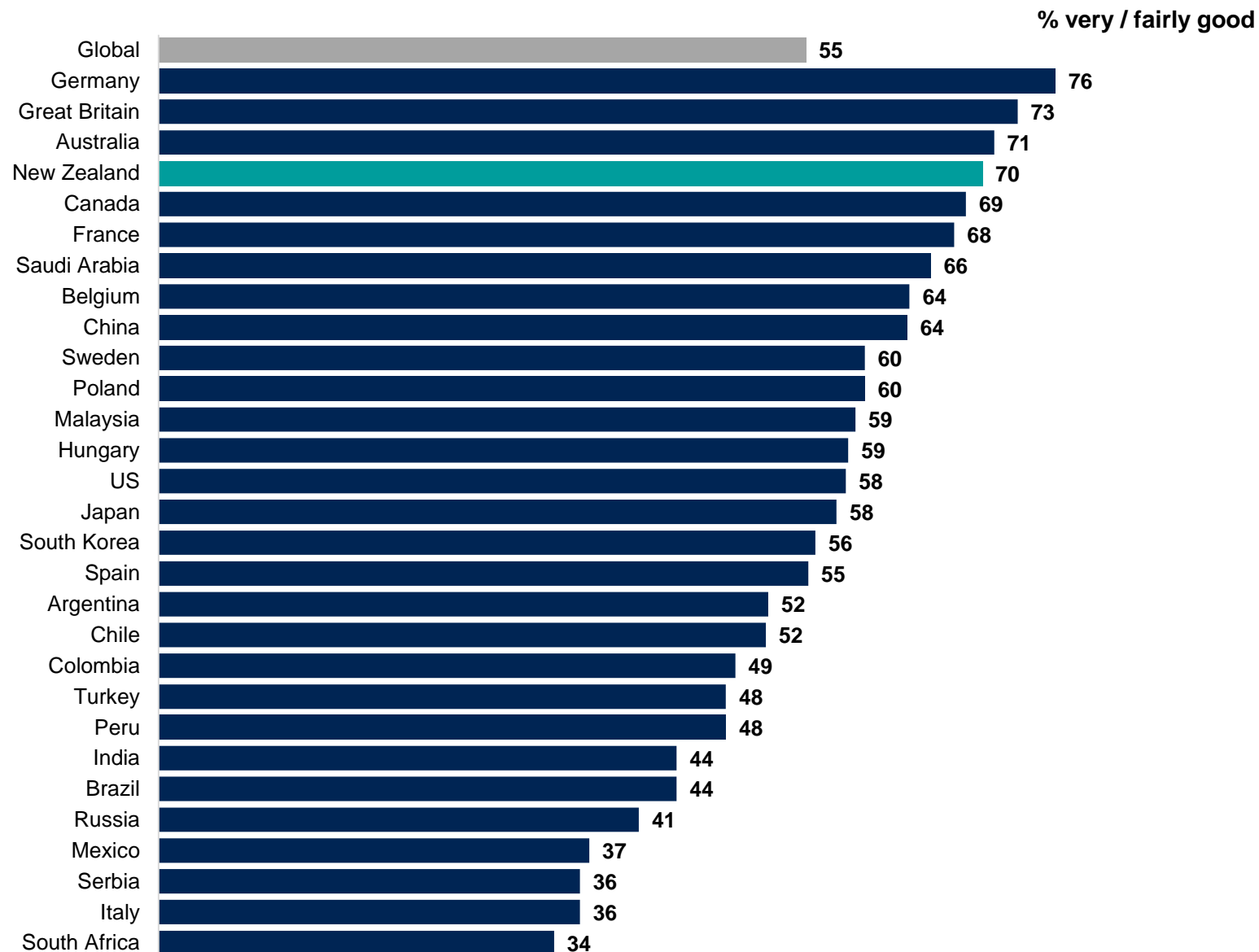
**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)



Please indicate how you would rate the current quality of each one in [country].

## Water Supply and Sewerage

70% of New Zealanders are happy with the quality of the country's water supply and sewerage, a result comparable to Great Britain (73%), Australia (71%) and Canada (69%).



**Q:** These next questions are about different types of infrastructure. Please indicate how good or poor you rate the current quality of each one in [COUNTRY].

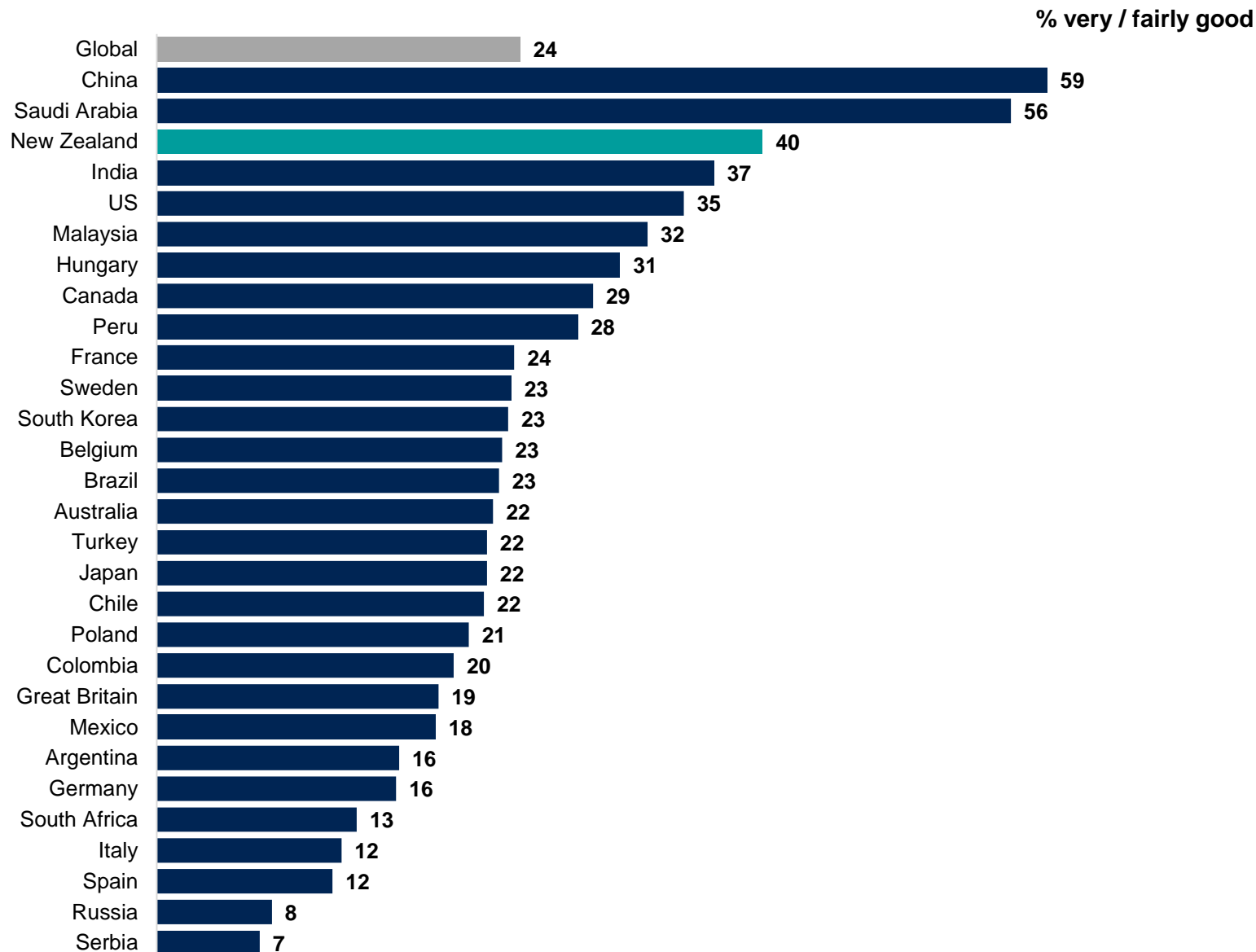
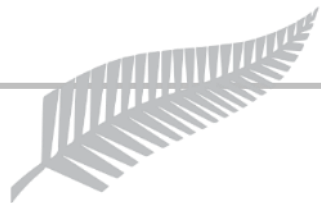
**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)



Please indicate how you would rate the current quality of each one in [country].

## Electric Vehicle Charging

Though New Zealand appears amongst the top-3 countries in terms of satisfaction with the electric vehicle charging infrastructure, the current satisfaction levels indicate that globally much work is required in this area.



**Q:** These next questions are about different types of infrastructure. Please indicate how good or poor you rate the current quality of each one in [COUNTRY].

**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)

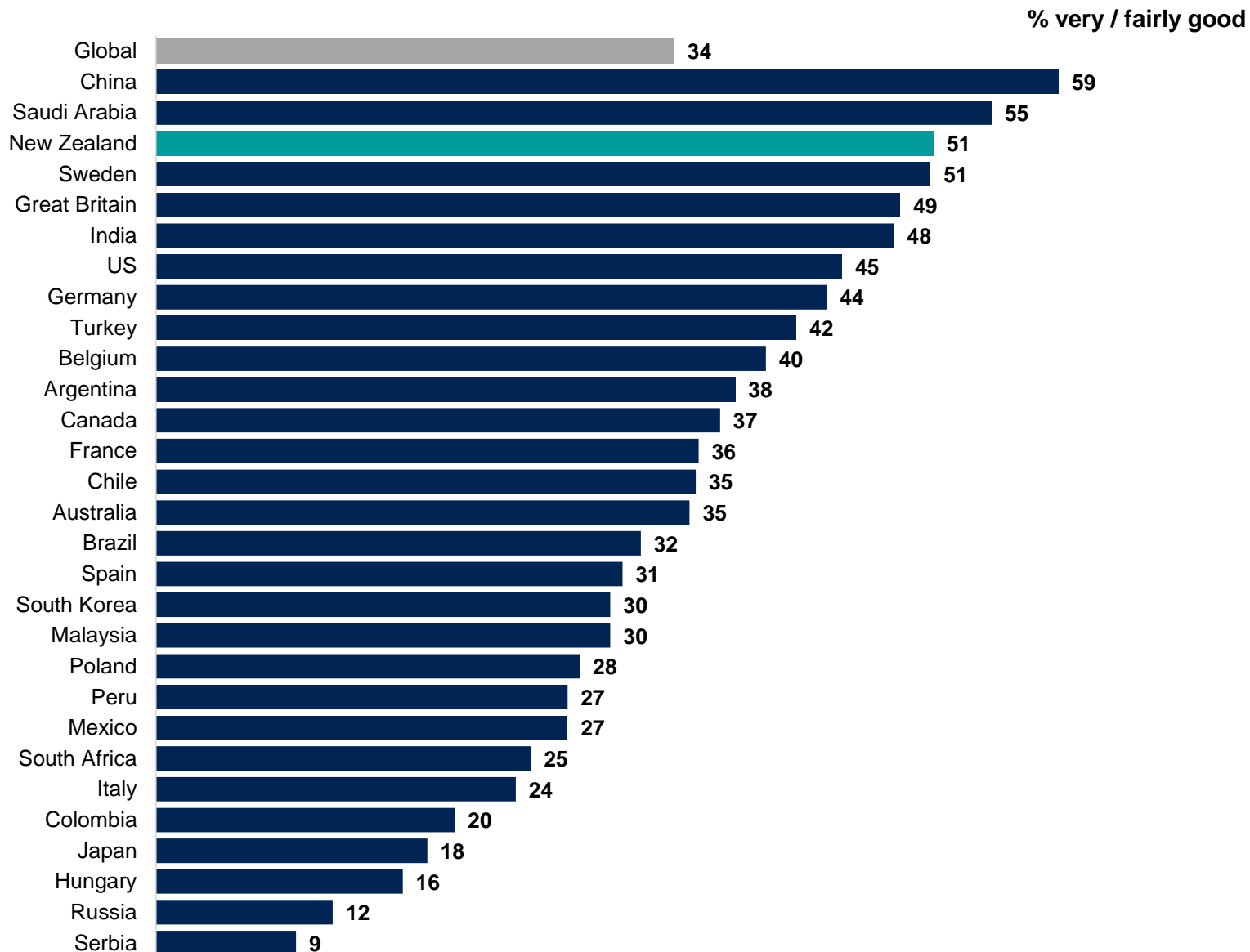




Please indicate how you would rate the current quality of each one in [country].

## Wind Energy

51% of New Zealanders are satisfied with the quality of the infrastructure that generates wind energy.



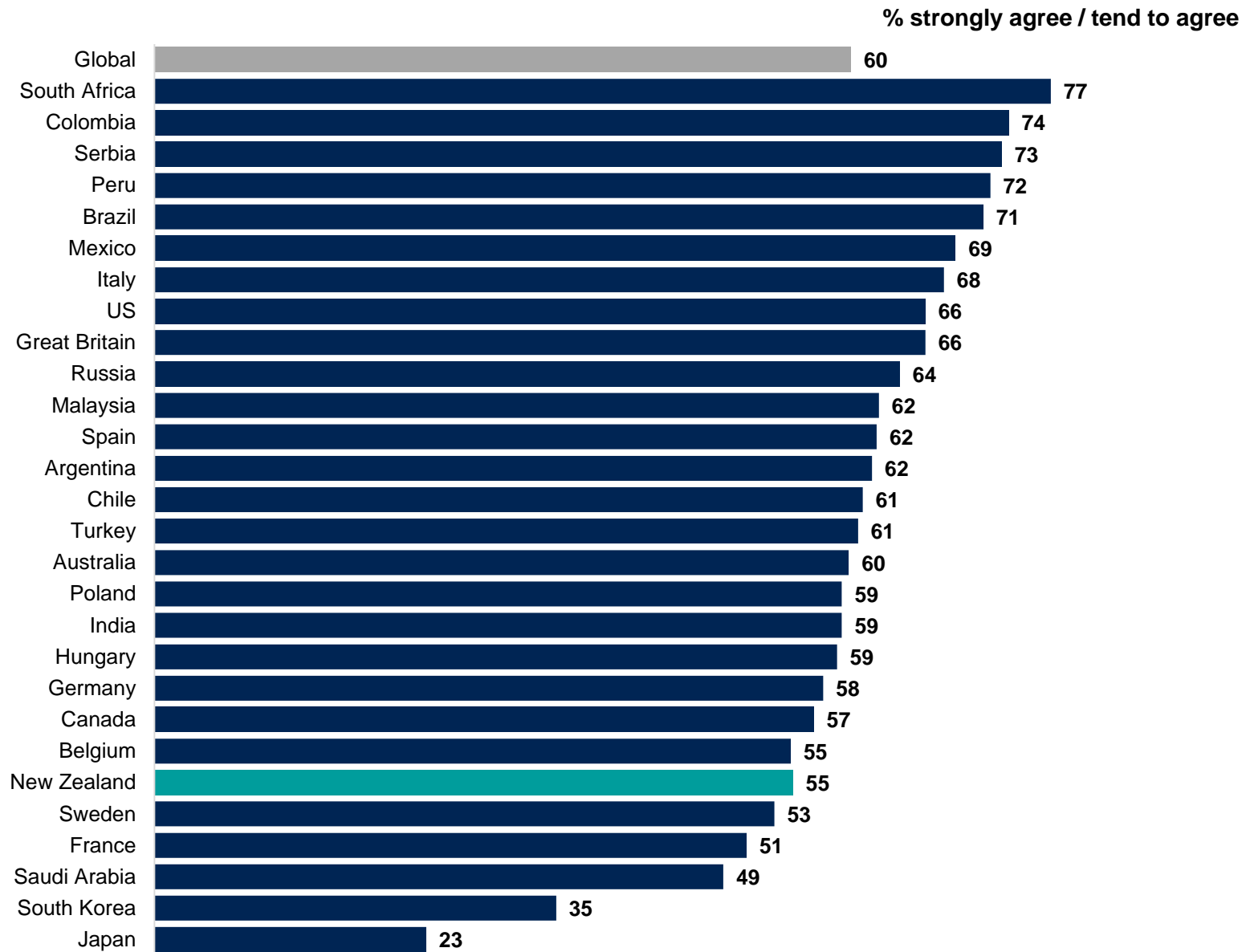
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**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)



As a country we are not doing enough to meet our infrastructure needs.

55% of New Zealanders agree that the country is not doing enough to meet its infrastructure needs.



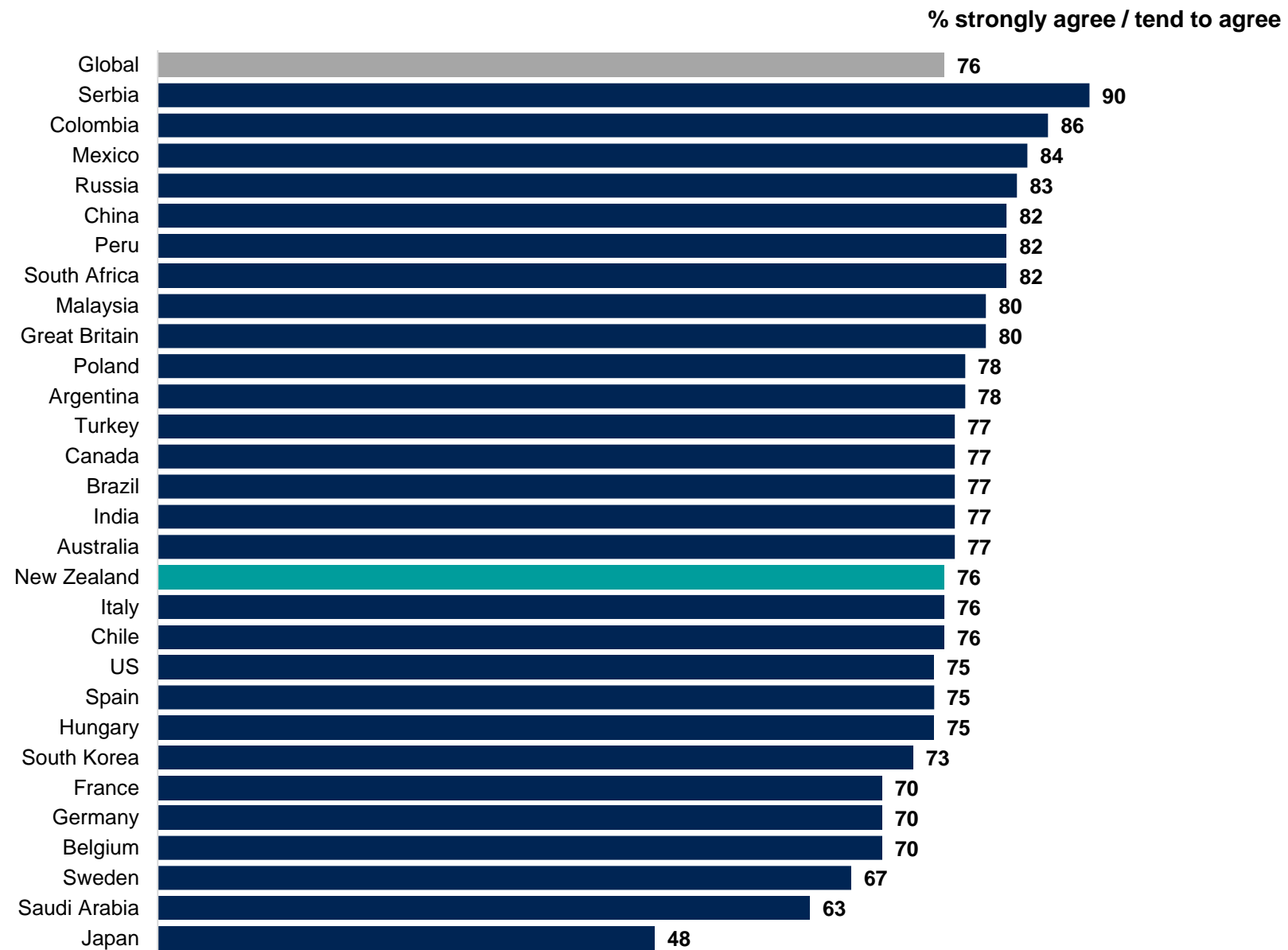
**Q:** To what extent do you agree or disagree...? As a country we are not doing enough to meet our infrastructure needs.

**Base:** n=19,516 adults aged 16+ in 28 countries, 26 July–9 August 2019; NZ sample – Nov '19 (n=561)



Investment in infrastructure is vital to [country]'s future economic growth.

The majority of countries agree that investing in infrastructure is important. Perceptions are similar across New Zealand (76%) and Australia (77%).



**Q:** To what extent do you agree or disagree...? Investing in infrastructure is vital to [COUNTRY]'s future economic growth.

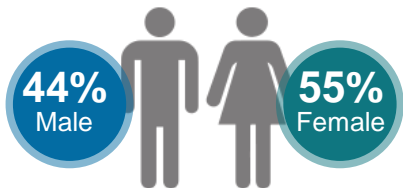
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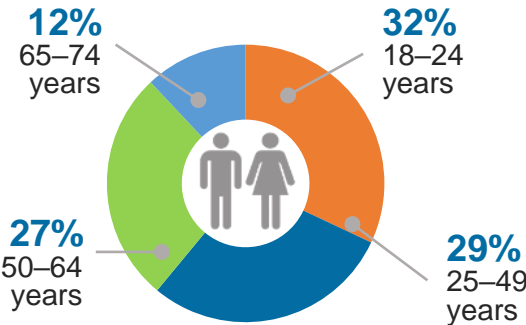
# SAMPLE DEMOGRAPHICS



**561 respondents**  
were interviewed online in  
November 2019 using the  
Dynata online panel



Results are  
weighted by age,  
gender and region  
to ensure they  
reflect the NZ  
population



## Employment status

- 44% Full-time
- 14% Part-time
- 12% Not in paid work & not seeking work
- 10% Retired
- 7% Self-employed
- 5% Student
- 7% Not in paid work but seeking work



## Highest education completed\*

- 31% Level 1-4
- 47% Level 5-7
- 18% Level 8-10
- 3% Don't know



## Type of area live in

- 50% In the suburbs of a large city
- 17% In a rural area
- 13% In a large city
- 11% In, or right outside, a medium-sized city
- 8% In, or right outside, a small city

\*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)

# METHODOLOGY

The survey was conducted in 29 countries around the world via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, New Zealand, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.

Between 500 and 1,000+ individuals participated on a country-by-country basis via the Ipsos Online Panel. The sample was 1,000+ in Australia, Canada, China, France, Germany, Great Britain, India, Italy, Japan, Spain, and the United States of America. In all other countries the sample was 500+.

Where results do not add up to 100, this may be due to computer rounding, multiple responses or the exclusion of 'don't know' or 'not stated' responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points.

Of the 29 countries surveyed online, 16 yield results that are balanced to reflect the general population: Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, New Zealand, Poland, South Korea, Spain, Sweden and the United States. The remaining countries surveyed – Brazil, Chile, China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, Serbia, South Africa and Turkey – produce a national sample that is more urban and educated, and with higher incomes than their fellow citizens. These are still a vital social group to understand in these countries, as they represent an important and emerging middle class.

# CONTACTS

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# GAME CHANGERS

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

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

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.**

# THANK YOU

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