THE IPSOS NEW ZEALAND ISSUES MONITOR

An Ipsos Survey – October 2021

GAME CHANGERS



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 4th to 10th October, we conducted fieldwork for our 15th Ipsos NZ Issues Monitor report with a total of 1,003 New Zealanders aged 18 and older*.

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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^{*}Note: The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points. Significantly higher / lower figures are reported at 95% confidence.









THE IPSOS NEW ZEALAND ISSUES MONITOR OVERVIEW

The media context: What was making New Zealand news early October?

New Zealanders should prepare to encounter Covid-19 before Christmas, experts say

RNZ - 7 October 2021

Auckland mayor urges govt help businesses in lockdown

RNZ - 13 October 2021

One potential way out of NZ's housing shortage, courtesy of Vancouver

Stuff - 4 October 2021

Senior Dr worried about Covid-19 spread in hospitals

RNZ – 1 October 2021

Green Party calls for expansion of government's one-off residence visa

Newshub - 10 October 2021

Tony Alexander: The first signs of a big shift in Kiwi attitudes to property investment?

One Roof- 6 October 2021

OCR up to 0.5%, the first rise in 7
years
TVNZ - 6 October 2021



KEY FINDINGS – OCTOBER 2021



Top issues in New Zealand

Housing (54%) remains the #1 issue in New Zealand in October, much higher than any other issue and much higher than any issue rated for Australians.

Healthcare / Hospitals (35%) and inflation / cost of living are 2nd and 3rd most important issues respectively and they have experienced a significant increase this wave.

Life in Auckland



Housing is also the #1 issue in Auckland.

The economy ranks higher in Auckland (4th) compared to rest of New Zealand (7th) and healthcare / hospitals is a bigger issue for rest of New Zealand (38% cf. 28% Auckland).

Government performance & political parties

The Labour government's performance rating continues to decline this month after reaching all time high levels during the early stages of the pandemic in 2020. Ratings still remain higher than pre-COVID lockdowns in March 2020.



Labour remains the party considered to be most capable in managing most of the issues facing New Zealanders. However, its lead over National in ability to manage a number of the top issues has been reducing through 2021. Act has also shown increases in issues where National has been traditionally stronger.

Aucklanders have selected National as being the most capable party in managing issues of *inflation / cost of living, crime / law, the economy* and other issues like *transport / infrastructure* and *taxation*.

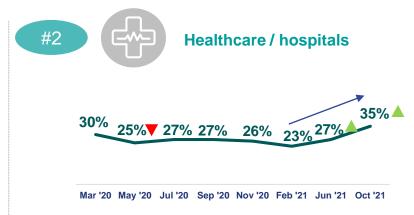
New Zealanders feel the Green Party is best equipped in managing *climate change* and *environmental pollution* & *water concerns*.

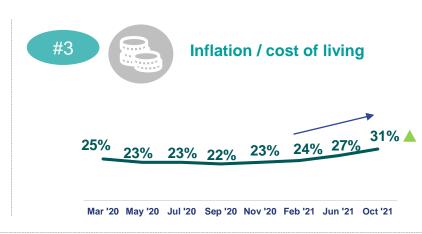


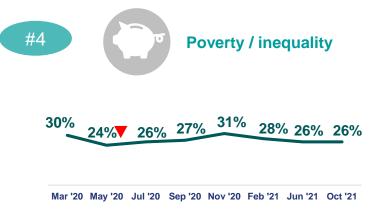
KEY FINDINGS – THE TOP ISSUES

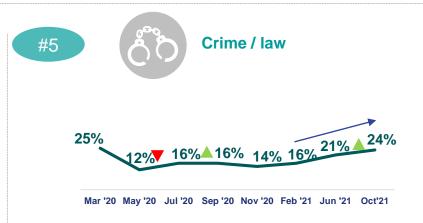
Housing remains a key issue for more than half of New Zealanders, significantly more than any other issues. Concerns for healthcare / hospitals and inflation / cost of living have increased steadily over the year with inflation and cost of living at an all time high. Crime / law has also increased and is now back at pre-COVID levels

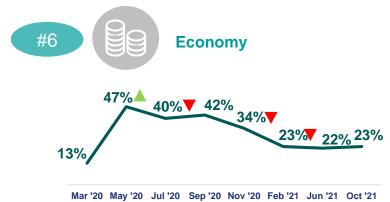
















THE MOST IMPORTANT ISSUES FACING NEW ZEALAND

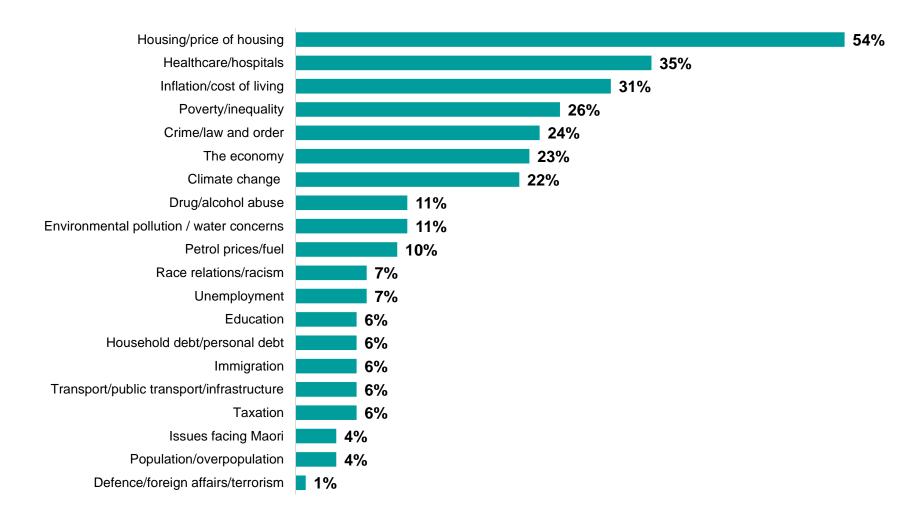
(October '21)



Women are more likely than men to select *Housing / price of housing* and *inflation / cost of living* as an Issue for New Zealand (*Housing*: Women 60% vs Men 47%) (*Inflation / cost of living*: Women 37% vs Men 26%)

Concerns for *healthcare* are more prevalent amongst older age groups – 50+ years (42%) and outside Auckland (Auckland 28% vs rest of New Zealand 35%).

18-34-year-olds are more worried on average by *cost of living* (41%).



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

Base: Total sample (n=1,003)



TOP-5 ISSUES

The top 5 issues in Oct '21 align to those seen in March '20 (pre-COVID-19 lockdown). Compared to June 21, crime / law has displaced economy to make it to the top 5 list.

	MAR '20 (n=610)	MAY '20 (n=1,000)	JUL '20 (n=1,000)	SEP '20 (n=1,000)	NOV '20 (n=1,001)	FEB '21 (n=1,000)	JUN '21 (n=1,003)	OCT '21 (n=1,003)
1	Housing / Price of Housing	Economy 47%	Economy 40%	Economy 42%	Housing / Price of Housing	Housing / Price of Housing	Housing / Price of Housing	Housing / Price of 54% Housing
2	Healthcare / Hospitals 30%	Unemployment 41%	Housing / Price of 34% Housing	Housing / Price of 37% Housing	Economy 34%	Poverty / 28% inequality	Healthcare / Hospitals 27%	Healthcare / Hospitals 35%
3	Poverty / 30% Inequality	Housing / Price of Housing	Unemployment 31%	Unemployment 27%	Poverty / 31% Inequality	Inflation / 24% Cost of Living	Inflation / 27% Cost of Living	Inflation / 31% Cost of Living
4	Inflation / 25% Cost of Living	Healthcare / 25% Hospitals	Healthcare / 27% Hospitals	Healthcare / 27% Hospitals	Healthcare / 26% Hospitals	Economy 23%	Poverty / 26% inequality	Poverty / 26% inequality
5	Crime / Law 25%	Poverty / 24% Inequality	Poverty / 26% Inequality	Poverty / 27% Inequality	Inflation / 23% Cost of Living	Healthcare / 23% Hospitals	Economy 22%	Crime / Law 24%
	Only a few COVID-19 cases in NZ	NZ moves out of level 4 lockdown	Alert Level 1	Alert Level 2 (second wave of cases)	Alert Level 1 / first wave post-election	Alert Level 1 / fieldwork overlapped with 'snap lockdown'	Alert Level 1	Northland, Auckland and Waikato - Alert Level 3 Rest of NZ – Alert level 2

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

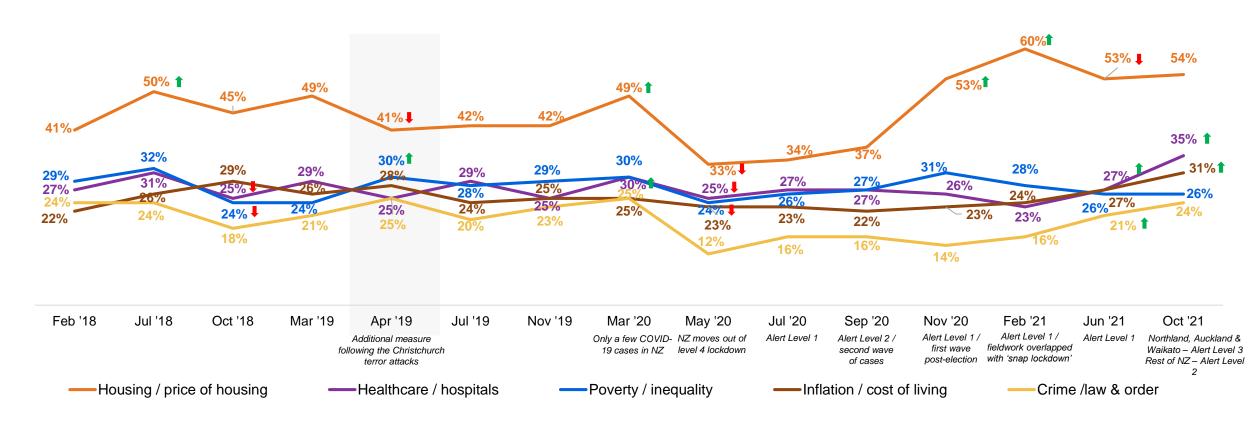
Base: Oct '21 (n=1,003), Jun '21 (n=1,003), Feb '21 (n=1,000), Nov '20 (n=1,001), Sep '20 (n=1,000), Jul '20 (n=1,000), May '20 (n=1,000), Mar '20 (n=610)





TOP-5 ISSUES OVER TIME

Healthcare, inflation, and crime / law and order have increased in prevalence over the year.



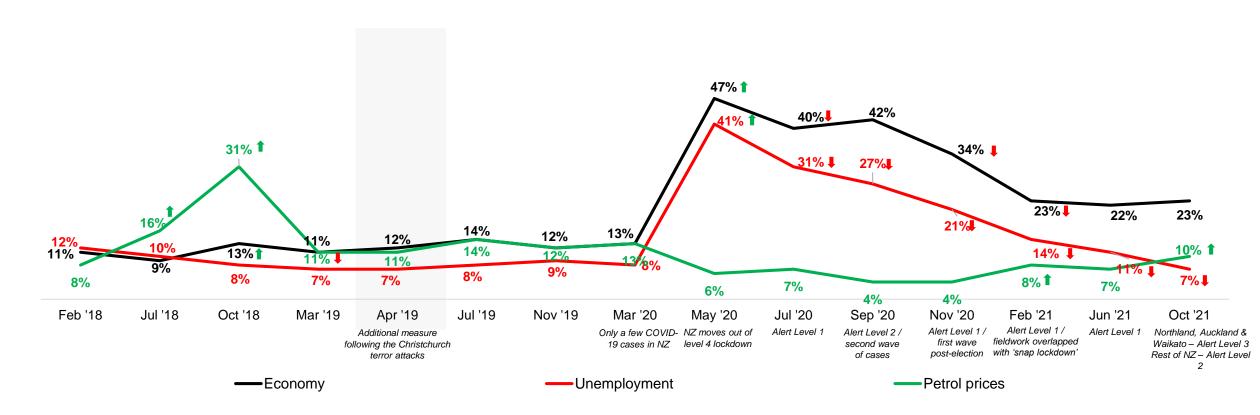
Q: What would you say are the three most important issues facing New Zealand today?

Base: Oct '21 (n=1,003), Jun '21 (n=1,003), Feb '21 (n=1,000), Nov '20 (n=1,001), Sep '20 (n=1,000), Jul '20 (n=1,000), 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)



NOTEWORTHY ISSUES

Since a sharp increase at the first COVID lockdown, the economy and unemployment have continued to decline as concerns facing New Zealanders. Concerns over petrol prices have increased during 2021.



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

Base: Oct '21 (n=1,003), Jun '21 (n=1,003), Feb '21 (n=1,000), Nov '20 (n=1,001), Sep '20 (n=1,000), Jul '20 (n=1,000), 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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RATING OF GOVERNMENT OVER LAST 6 MONTHS

Rating of the Labour government continues to decline in 2021.

54% of all respondents gave the current Labour government a rating of 7–10 out of 10 and 18% gave a rating of 0–3.

Key Demographic Differences

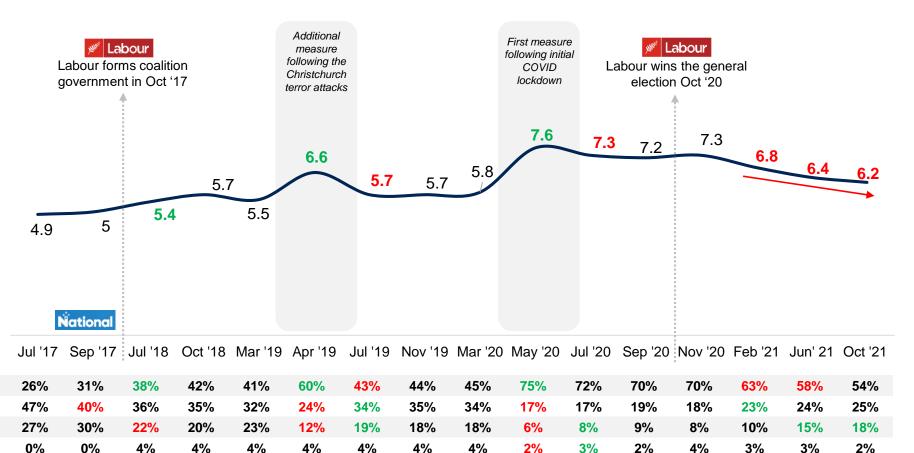
Top 4 (7-10)

Neutral (4-6)

Don't know

Bottom 4 (0-3)

Those with lower annual household income (< \$50,000) have on average rated Labour higher (6.7).



Q: Overall, how would you rate the government for its job in the last 6 months from 0 to 10, where 0 means 'abysmal' and 10 means 'outstanding'?

Base: Oct '21 (n=1,003), Jun '21 (n=1,003), Feb '21 (n=1,000), Nov '20 (n=1,001), Sep '20 (n=1,000), Jul '20 (n=1,000), 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), Sep '17 (n=500), Jul '17 (n=501)





POLITICAL PARTY MOST CAPABLE OF MANAGING ISSUES

Historically, the Green Party was seen as most capable of managing climate change & environmental issues. After being overtaken by the Labour Party earlier this year, they have resumed their position as the party perceived most capable.

ISSUE	POLITICAL PARTY
1: Housing / Price of Housing	# Labour
2: Healthcare / Hospitals	Labour
3: Inflation / Cost of Living	Labour
4: Poverty / Inequality	Labour
5: Crime / Law & Order	Labour
6: The Economy	# Labour
7: Climate Change	Green
8=: Environmental pollution / water concerns	Green
8=: Drug / Alcohol Abuse	₩ Labour
10: Petrol prices / fuel	# Labour

ISSUE	POLITICAL PARTY
11=: Race Relations / Racism) Labour
11=: Unemployment	W Labour
13=: Education	W Labour
13=: Household debt / personal debt	₩ Labour
13=: Immigration	Labour
13=: Transport / Public Transport / Infrastructure	W Labour
13=: Taxation	₩ Labour
18=: Issues facing Māori	māəri
18=: Population / Overpopulation	₩ Labour
20: Defence / Foreign Affairs	⊯ Labour

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

Base: Total sample Oct '21 (n=1,003)



#1 ISSUE - HOUSING / PRICE OF HOUSING

Although Labour remains the most preferred party in dealing with housing issues, confidence in Labour to manage this issue continues to decline, reaching its lowest point

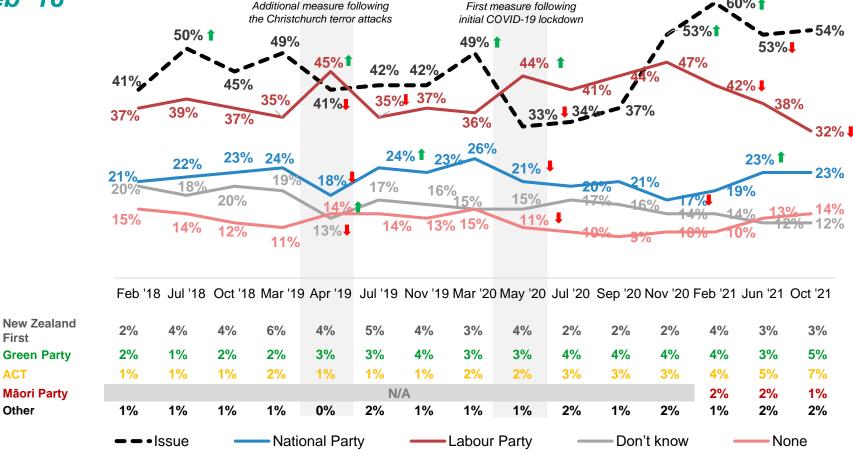
since surveying began in Feb '18



Concerns about housing & the price of housing remains the number one issue in New Zealand.

Women (60%) were more likely than men (47%) to show concerns over housing.

In Nov '20. Labour enjoyed a significant 30-percentage points lead over the National party in managing the *housing* issue but this has reduced to 9-percentage points in Oct '21.



Q: Please select the political party that you believe is most capable of managing each of the following issues: Housing / Price of Housing Base: Approx. n=610 per wave, except for May '20 (n=1,000), Jul '20 (n=1,000), Sep '20 (n=1,000), Nov '20 (n=1,001), Feb '21 (n=1,000), Jun '21 (n=1,003), Oct '21 (n=1,003)

First

ACT

Other





SUGGESTIONS TO IMPROVE HOUSING ISSUES

Voice of New Zealanders



"A focus on inflation and affordable housing would be key to improving the quality of life for me."

Auckland City, full-time employment, TAHI*: Over 160k



"Do something to make housing more affordable to get more people off the streets."

Nelson / Marlborough, not in paid work but seeking work, TAHI*: Prefer not to say



"Housing is too expensive for first home buyers and people who are low salary earners."

Canterbury, full-time employment, TAHI*: \$80k-\$100k



"Get a handle on the rising cost of living and house prices."

Taranaki, full-time employment, TAHI*: 80k-\$100k



"Seriously address housing shortages and lack of housing. It is causing run off effects which present themselves in inequality and lack of infrastructure will choke our cities."

Wellington, student, TAHI*: \$140k-\$160k



"Fix the problem of housing and high rents!"

Auckland City, full-time employment, TAHI*: \$30k-\$50k

Q: What do you think the government needs to change or do differently to improve life in New Zealand? (open-ended question) **Base:** Total sample Oct '21 (n=1,003)



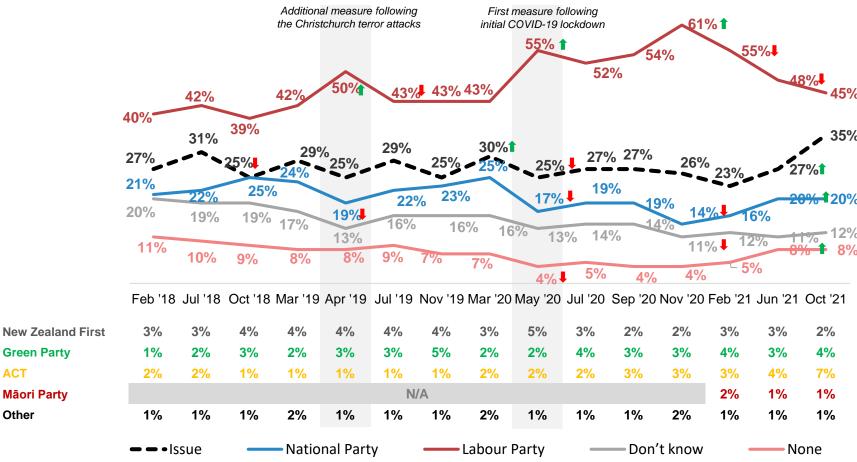
#2 ISSUE - HEALTHCARE / HOSPITALS

Labour remain the party New Zealanders believe to be the most capable in managing this issue despite a decline in perceived capability through 2021.



Healthcare / hospitals has experienced a second consecutive increase this wave.

In Nov '20, Labour had a significant 47-percentage points lead over the National party in managing the issue of *healthcare / hospitals* but this has reduced to 25-percentage points in Oct '21.



Q: Please select the political party that you believe is most capable of managing each of the following issues: <u>Healthcare / Hospitals</u>

Base: Approx. n=610 per wave, except for May '20 (n=1,000), Jul '20 (n=1,000), Sep '20 (n=1,000), Nov '20 (n=1,000), Feb '21 (n=1,000), Jun '21 (n=1,003), Oct '21 (n=1,003)





SUGGESTIONS TO IMPROVE HEALTHCARE

Voice of New Zealanders



"I think it needs to get the health care system sorted so if COVID becomes widespread we will be prepared."

Auckland City, retired, TAHI*: \$30k-\$50k



"They need to keep going with what they have started and change the way the health system and welfare system operate. They need to change the culture in these department."

Canterbury, Retired, TAHI*: \$15k-\$30k



"Get more people vaccinated."

Waikato, full-time employment, TAHI*: \$120k-\$140k



"The healthcare system is dreadful. People can't get to specialists outside the region or the equipment they need"

Nelson / Marlborough, not in paid work and not seeking work, TAHI*: Prefer not to say



"Invest in healthcare, dental care and housing."

Hawkes' Bay, full-time employment, TAHI*: \$50k-\$60k



"Pursue vaccination for 5-12 year olds, continue to promote vaccinations and determine who should be required to be vaccinated"

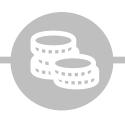
Auckland City, Retired, TAHI*: \$30k-\$50k

Q: What do you think the government needs to change or do differently to improve life in New Zealand? (open-ended question) **Base:** Total sample Oct '21 (n=1,003)



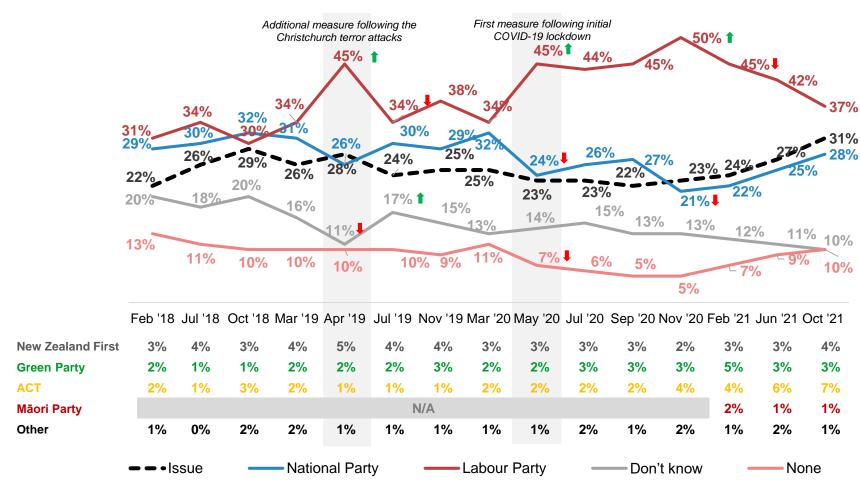
#3 ISSUE - INFLATION / COST OF LIVING

Labour remains the preferred party in managing inflation / cost of living but they have been losing ground in 2021 with slow increases over time for National closing the gap.



Inflation / cost of living has continued to increase this wave, with just under a third of New Zealanders believing that it is an important issue for the country.

In Nov '20, Labour enjoyed a significant 31-percentage points lead over the National party in managing the issue of *inflation / cost of living* but this has reduced to 9-percentage points in Oct '21.



Q: Please select the political party that you believe is most capable of managing each of the following issues: Inflation / cost of living

Base: Approx. n=610 per wave, except for May '20 (n=1,000), Jul '20 (n=1,000), Sep '20 (n=1,000), Nov '20 (n=1,001), Feb '21 (n=1,000), Jun '21 (n=1,003), Oct '21 (n=1,003)



#4 ISSUE - POVERTY / INEQUALITY

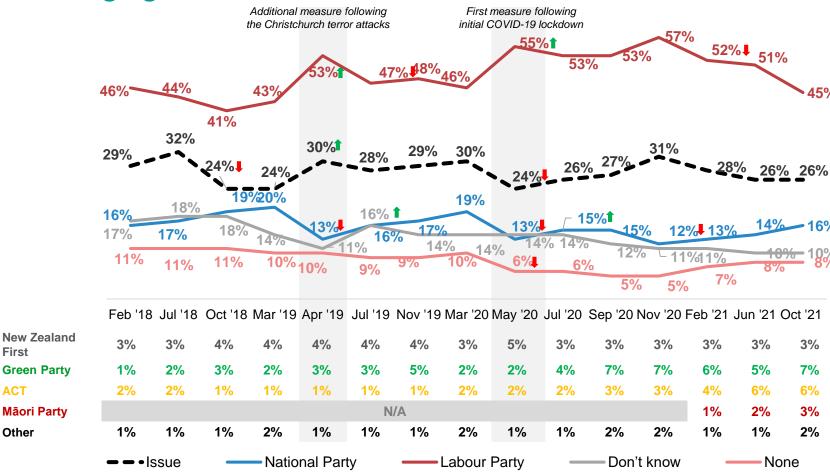
Poverty / inequality remains an important issue. Just under half of New Zealanders believe that Labour is most capable of managing this issue.



Poverty / inequality is the fourth most important issue to New Zealanders again this wave.

Though confidence in Labour party for managing this issue has declined from 57% in Nov '20 to 45% in Oct '21 the gap with the National party (16%) remains high.





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

Base: Approx. n=610 per wave, except for May '20 (n=1,000), Jul '20 (n=1,000), Sep '20 (n=1,000), Nov '20 (n=1,001), Feb '21 (n=1,000), Jun '21 (n=1,003), Oct '21 (n=1,003)



#5 ISSUE - CRIME / LAW

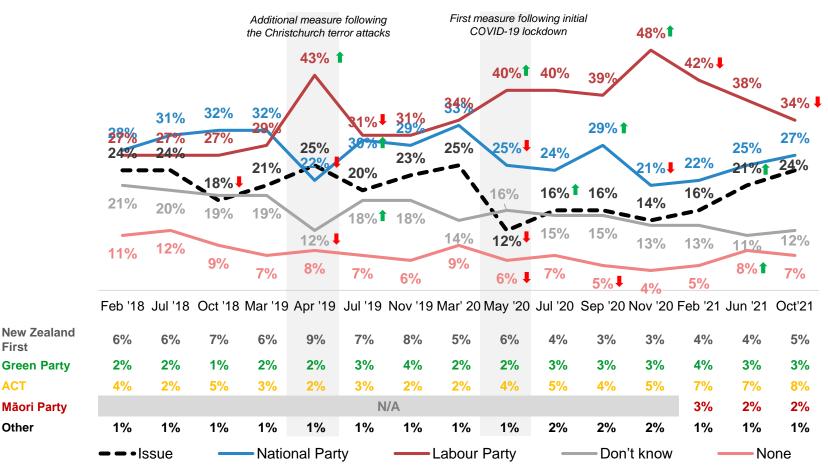
Labour remains the preferred party in managing the crime / law situation but gap between Labour and National is closing.



Crime / Law has moved up a spot this wave from the sixth most important issue to fifth.

Those over the age of 50 years (32%) are more concerned about this issue compared to those under 50 years (17%)

In Nov '20, Labour held a significant 27-percentage points lead over the National party in managing the issue of *crime / law* but this has reduced to 7-percentage points in Oct '21.



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

Base: Approx. n=610 per wave, except for May '20 (n=1,000), Jul '20 (n=1,000), Sep '20 (n=1,000), Nov '20 (n=1,001), Feb '21 (n=1,000), Jun '21 (n=1,003), Oct '21 (n=1,003)





How are Aucklanders feeling compared to the rest of NZ?



AUCKLAND VS THE REST OF NZ

The economy ranks higher in Auckland compared to rest of New Zealand and healthcare / hospitals is a bigger issue for rest of New Zealand.

The issue of *housing* is the top issue both in Auckland (54%) and the rest of NZ (53%).

Healthcare / hospitals is a common top issue but its more pronounced in rest of New Zealand (38%) compared to Auckland (28%).

In Auckland the *economy* ranks 4th in comparison with the rest of New Zealand where it sits in 7th place.

Those in Auckland were significantly more likely to rank immigration, Transport / Infrastructure and household / personal debt as an issue than those in the rest of NZ.

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

Base: Total sample Oct '21 (n=1,003)

AUCKLAND

(n=348)

1	Housing / price of housing	54%
2	Inflation / cost of living	34%
3	Healthcare / hospitals	28%↓
4	Economy	26%
5	Crime / law & order	24%
6	Poverty / inequality	23%
7	Climate change	19%
8	Petrol prices / fuel	11%
9=	Environmental pollution / water concerns	9%
9=	Drug / alcohol abuse	9%
9=	Immigration	9% 🕇
9=	Transport / public transport / infrastructure	9% 1
9=	Household debt / personal debt	9% 1

REST OF NZ

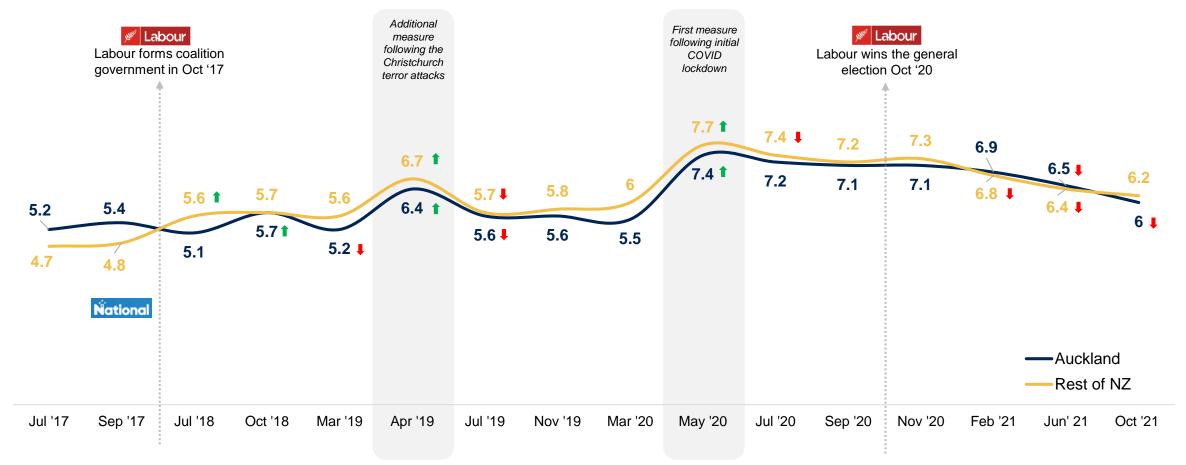
(n=655)

1	Housing / price of housing	53%
2	Healthcare / hospitals	38%1
3	Inflation / cost of living	30%
4	Poverty / inequality	28%
5=	Crime / law & order	23%
5=	Climate change	23%
5= 7	Climate change Economy	23% 22%
	· ·	
7	Economy Environmental pollution / water	22%



AUCKLAND VS THE REST OF NZ

Aucklanders' rating of Government performance has decreased since Jun '21, while the rest of New Zealand's ratings have remained stable.



Q: Overall, how would you rate the government for its job in the last 6 months from 0 to 10, where 0 means 'abysmal' and 10 means 'outstanding'?

Base: Oct '21 (n=1,003), Jun '21 (n=1,003), Feb '21 (n=1,000), Nov '20 (n=1,001), Sep '20 (n=1,000), Jul '20 (n=1,000), 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), Sep '17 (n=500), Jul '17 (n=501)



AUCKLAND VS THE REST OF NZ

Aucklanders feel the National Party is most capable in managing some key issues like inflation / cost of living, crime law & the economy whereas rest of the country has higher confidence in the Labour Party.

ISSUE	AUCKLAND	RONZ
1: Housing / Price of Housing	# Labour	Labour
2: Healthcare / Hospitals	# Labour	# Labour
3: Inflation / Cost of Living	National	Labour
4: Poverty / Inequality	Labour	Labour
5: Crime / Law & Order	National	Labour
6: The Economy	N ational	Labour
7: Climate Change	Green	Green
8=: Environmental pollution / water concerns	Green	Green
8=: Drug / Alcohol Abuse	⊯ Labour	Labour
10: Petrol prices / fuel	Labour	Labour

ISSUE	AUCKLAND	RONZ
11=: Race Relations / Racism	# Labour	Labour
11=: Unemployment	# Labour	# Labour
13=: Education	# Labour	# Labour
13=: Household debt / personal debt	₩ Labour	
13=: Immigration	# Labour	Labour
13=: Transport / Public Transport / Infrastructure	National	₩ Labour
13=: Taxation	National	Labour
18=: Issues facing Māori	māəri	maari
18=: Population / Overpopulation	# Labour	Labour
20: Defence / Foreign Affairs	⊯ Labour	# Labour

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

Base: Total sample Oct '21 (n=1,003) Auckland (n=348), RONZ (n=655) Note 1: Ranking is the overall New Zealand ranking of issues. Note 2: RONZ = Rest of New Zealand



WHAT GOVERNMENT NEEDS TO DO TO IMPROVE LIFE

Voice of Aucklanders





"Change the COVID strategy from elimination and focus on vaccinations, encourage housing by supporting landlords."

Auckland, full-time employment, TAHI*: Over \$160k



"Keep COVID out until everyone possible is vaccinated for COVID. Then slowly re-open the economy."

Auckland, full-time employment, TAHI*: 50k-\$60k



"Work towards improving the cost of living and housing."

Auckland, student, TAHI*: Under \$15k

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

Base: Aucklanders Oct '21 (n=348)





TOP-10 ISSUES - NZ VS AUSTRALIA



The issue of *housing* continues to be the top issue in New Zealand (54%). The top issue in Australia is healthcare (43%).

Healthcare and the economy are the top issues in Australia; these two issues are 2nd and 6th respectively in New Zealand.

Concerns around *cost of living* is similar across both countries.

Poverty / inequality is 4th in New Zealand (26%) but 8th in Australia (15%) whereas *unemployment* is a bigger issue in Australia (18%) compared to New Zealand (7%).







1	Healthcare	43%
2	Economy	37%
3	Cost of living	30%
4	Housing	29%
5	Environment	27%
6=	Unemployment	18%
6=	Crime	18%
8	Poverty	15%
9	Education	12%
10=	Personal debt	9%
10=	Immigration	9%

Base: October 2021 – New Zealand (n=1,003), Australia (n=1000)



SAMPLE DEMOGRAPHICS – OCTOBER '21



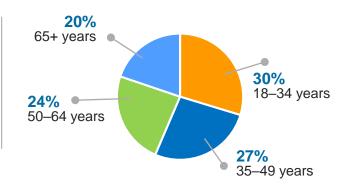
1,003 respondents

were interviewed online in October 2021 using online panels



The precision of Ipsos online polls is 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





Employment status

43% Full-time

16% Retired

14% Part-time

8% Self-employed

7% Not in paid work but seeking work

5% Not in paid work & not seeking work

6% Student

.....



Highest education completed*

33% (None + Level 1–3)

47% Level 4–7

18% Level 8–10

2% Don't know

Sample sizes over time

- Oct' 21 (n=1,003)
 - Nov '19 (n=610)
- Jun '21 (n=1,003)
- Jul '19 (n=610)
- Feb '21 (n=1,000)
- Apr '19 (n=615)
- Nov '20 (n=1,001)
- Mar '19 (n=614)
- Sep '20 (n=1,000)
- Oct '18 (n=610)
- Jul '20 (n=1,000)
- Jul '18 (n=611)
- May '20 (n=1,000)
- Feb '18 (n=610)
- Mar '20 (n=610)



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ABOUT IPSOS

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Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

"Game Changers" – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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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.

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 knowhow 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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