THE IPSOS NEW ZEALAND ISSUES MONITOR

An Ipsos Survey – September 2023

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.

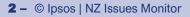
The Ipsos New Zealand Issues Monitor tracks what New Zealanders are concerned about, who is worried about what and which political parties are seen to be best able to improve these matters. During 16–22 August we conducted fieldwork for our 21st Ipsos NZ Issues Monitor report with a total of 1,148 New Zealanders aged 18 and older*.

This study 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. TVNZ was involved in this measure of Ipsos Issues Monitor through the addition of some exclusive questions. They had no input into the core questions or reporting, which remain entirely independent.

Please direct all queries to Amanda Dudding – 021 612 264 or <u>amanda.dudding@ipsos.com</u>, or Carin Hercock – 021 394 508 or <u>carin.hercock@ipsos.com</u>

*Note: The precision of Ipsos online survey is calculated with a credibility interval with a sample of 1,148 accurate to + / - 3.5 percentage points. Significantly higher / lower figures are reported at 95% confidence.

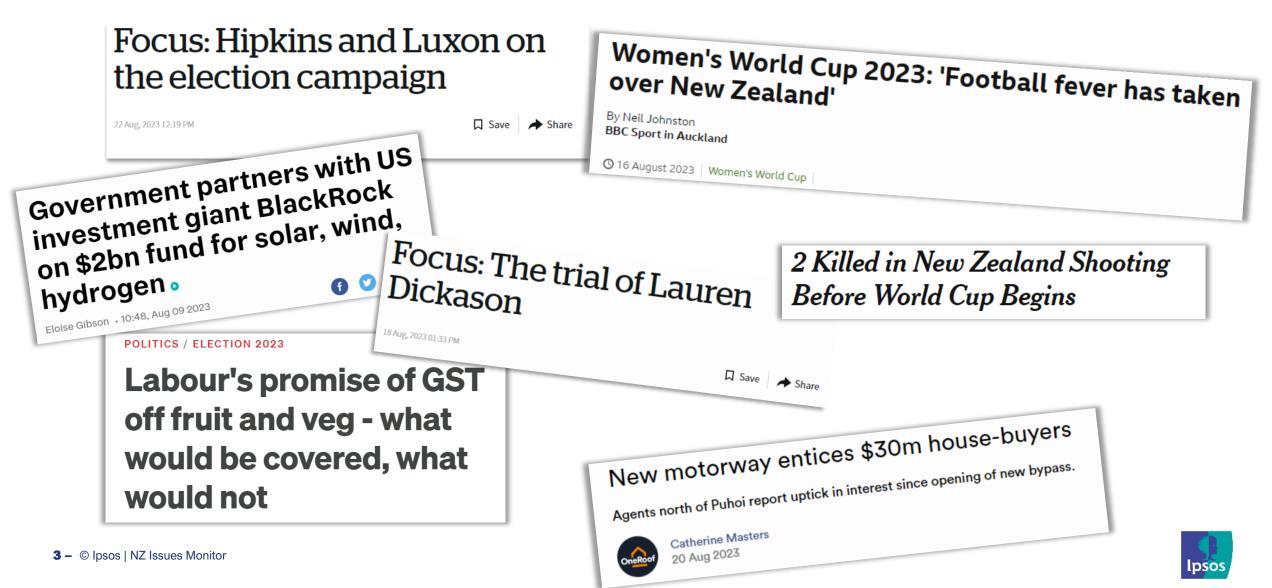
Where results do not add up to 100, this may be due to computer rounding, multiple responses or the exclusion of 'don't know' or 'not stated' responses.





THE IPSOS NEW ZEALAND ISSUES MONITOR OVERVIEW

The media context: What was making New Zealand news in early to mid August?



KEY FINDINGS – AUGUST 2023

TOP ISSUES IN NEW ZEALAND

Inflation / cost of living remains the most important issue for New Zealanders.

Crime / law & order retains its position as the #2 issue.





Housing / cost of housing remains a key area of concern and is the **third highest issue** for New Zealanders. New Zealanders aged 18-34 are significantly more likely to identify *housing* as a top issue.

The economy replaced *climate change* as the **fifth highest issue** for New Zealand.





GOVERNMENT PERFORMANCE & POLITICAL PARTIES' CAPABILITY TO MANAGE ISSUES

New Zealanders' rating of the Government's performance has continued to decrease significantly this wave, reaching a recordlow mean score since surveying began in 2018.

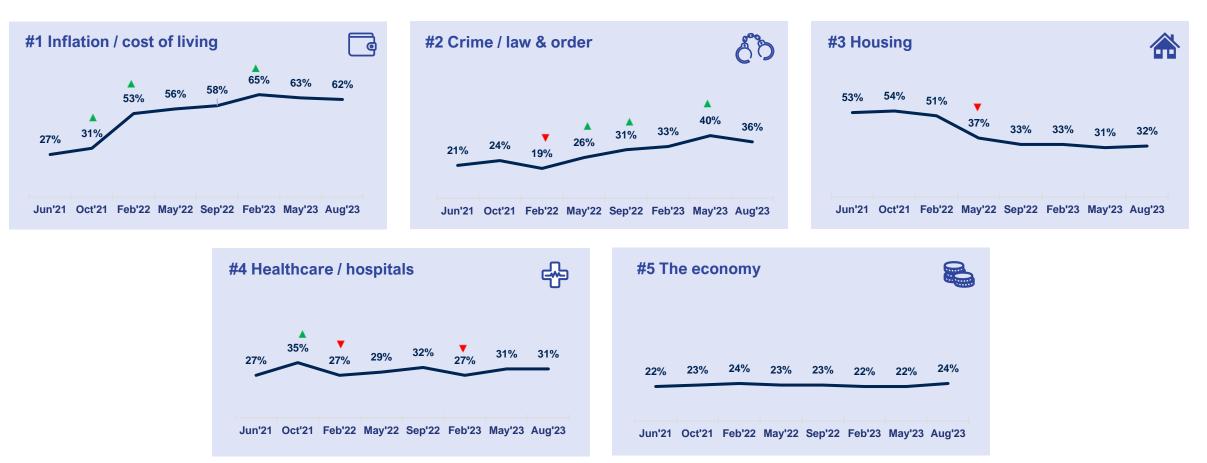
When asked about the party best placed to tackle the country's biggest issues, New Zealanders believe that **National** is the most capable of managing all 5 of the top-5 issues (*inflation / cost of living, crime / law, housing / price of housing, healthcare / hospitals* and *the economy*) and 8 of the top 10 issues.

Labour is perceived to be most capable of managing *poverty* / *inequality* and *race relations* / *racism*, while the Green Party is believed to be most capable of managing *climate change* and *environmental pollution*. Te Pāti Māori is considered to be most capable of managing *issues facing Māori*.



KEY FINDINGS – THE TOP ISSUES

Inflation / cost of living remains the number 1 issue for New Zealanders. Concerns around *crime / law*, *housing & healthcare / hospitals* have remained consistent since May '23. An increase in concern for *the economy* has resulted in it overtaking of *climate change* as the 5th most important issue to New Zealanders.



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

Base: Total sample – Aug '23 (n=1,148), May '23 (n=1,002), Feb '23 (n=1,002), Sep '22 (n=1,000), May '22 (n=1,000), Feb '22 (n=1,004), Oct '21 (n=1,003), Jun '21 (n=1,003)

5 - © Ipsos | NZ Issues Monitor

dicates

significant

ecrease

compared to

the previous

THE TOP ISSUES

The most important issues facing New Zealand today

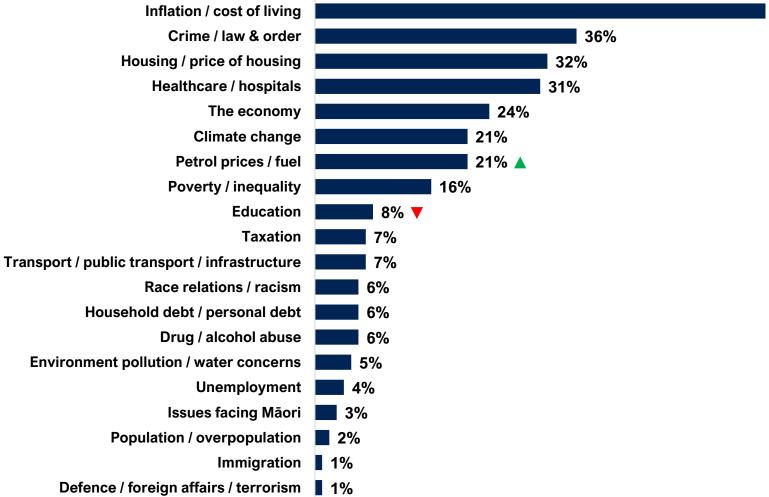
THE MOST IMPORTANT ISSUES FACING NEW ZEALAND

Inflation / cost of living remains the most important issue by a sizeable margin. Concerns for crime / law & order, housing / price of housing and healthcare / hospitals remain stable, with housing / price of housing retaining its 3rd position ahead of healthcare / hospitals. Just 3 percentage points ahead, the economy has overtaken climate change as the 5th most important issue.

New Zealanders aged under 50 are significantly <u>more</u> concerned about *inflation / cost of living* (67%) and <u>less</u> concerned about *healthcare / hospitals* (23%).

Compared to the previous fieldwork period in May '23, New Zealanders are significantly <u>more</u> concerned about *petrol prices / fuel* and <u>less</u> concerned about *education*.

Māori respondents are significantly <u>less</u> concerned about *crime* (27%), *healthcare / hospitals* (22%) and *the economy* (15%). However, they are significantly <u>more</u> concerned about *petrol prices / fuel* (28%) and *poverty / inequality* (23%).



Q: What would you say are the three most important issues facing New Zealand today? **Base:** Total sample – Aug '23 (n=1,148)

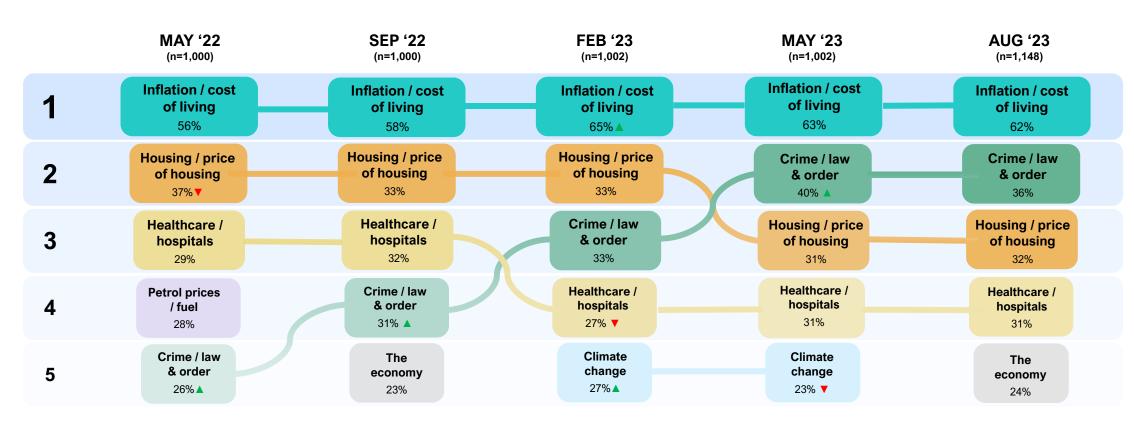
7 - © Ipsos | NZ Issues Monitor



62%

TOP-5 ISSUES

Inflation / cost of living has been the top issue for New Zealanders by a large margin since May 2023. During this period, concern for crime / law & order had been increasing, but now appears to be stabilising. Although the top 4 issues are stable from the last measure, climate change has moved out of the top 5, replaced by the economy.



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

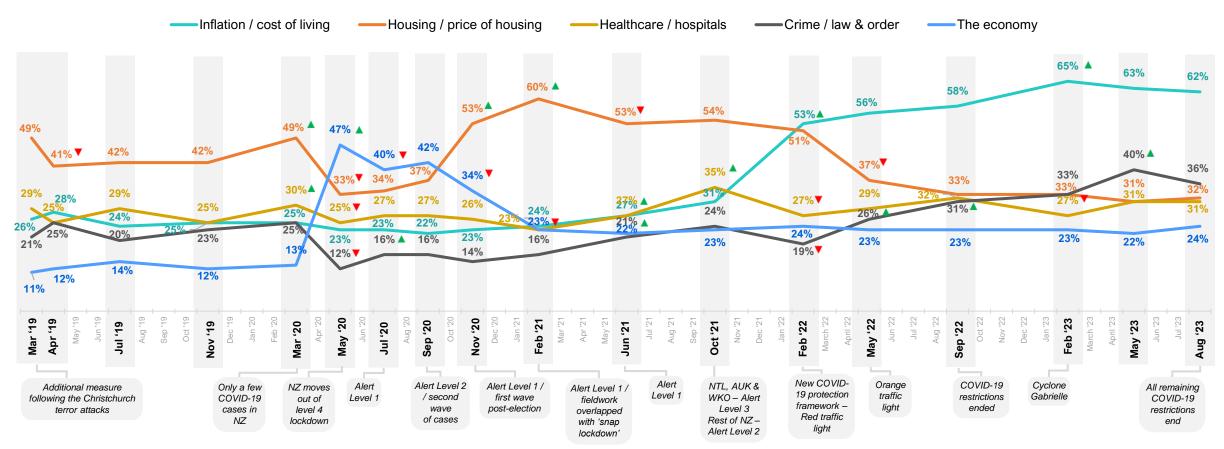
Base: Total sample – Aug '23 (n=1,148), May '23 (n=1,002), Feb '23 (n=1,002), Sep '22 (n=1,000), May '22 (n=1,000)

8 - © Ipsos | NZ Issues Monitor



TOP-5 ISSUES OVER TIME

A large margin remains between *inflation / cost of living* & the second ranked issue, *crime / law & order*. Meanwhile, concern for *housing / price of housing* and *healthcare / hospitals* remain relatively stable. *The economy*, despite not changing drastically from May '23, has regained its position in the top-5, replacing *climate change*.



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

9 - © Ipsos | NZ Issues Monitor

Base: Total sample – Aug '23 (n=1,148), May '23 (n=1,002), Feb '23 (n=1,002), Sep '22 (n=1,000), May '22 (n=1,000), Feb '22 (n=1,004), 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)



V ✓ Indicates significant increase / decrease 21% ▲ 21% ▲

compared

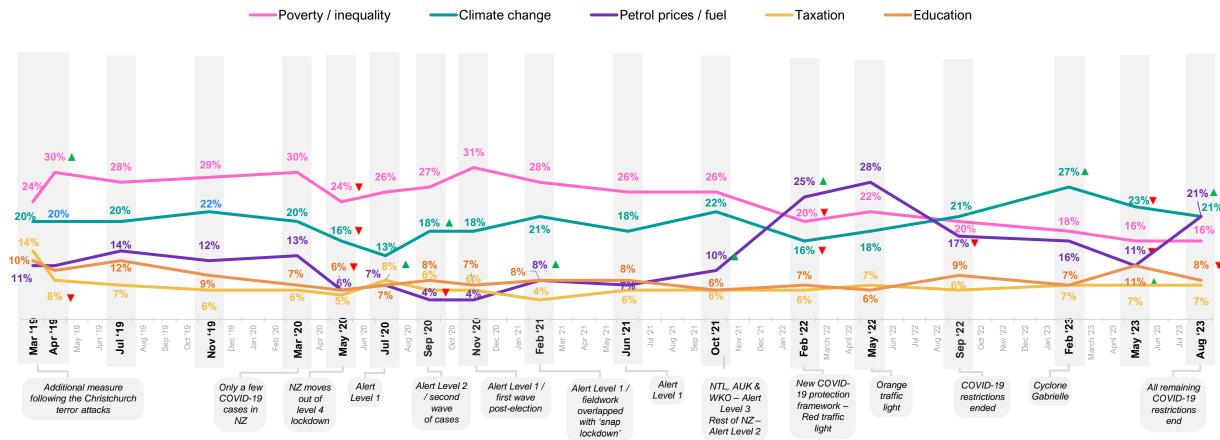
õ

the

previous wave

NOTEWORTHY ISSUES

Concern for *petrol prices / fuel* has significantly increased from last wave to match *climate change*, likely due to the end of the fuel subsidy. New Zealanders' concern for *poverty / inequality* remains stable, though over time is trending slightly downwards. Following a spike in concern for *education* in May '23, the issue appears to have stabilised. *Taxation* has also remained stable.



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

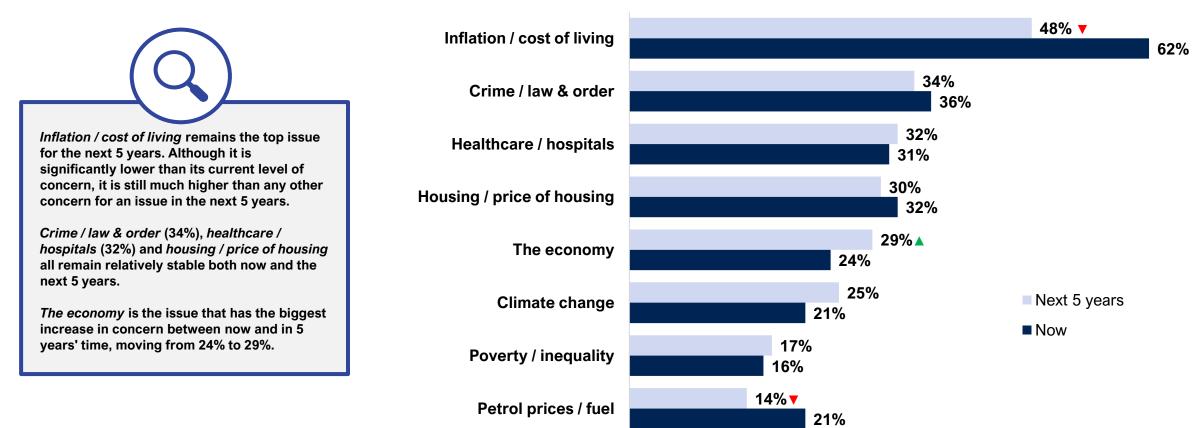
10 – © Ipsos | NZ Issues Monitor

Base: Total sample – Aug '23 (n=1,148), May '23 (n=1,002), Feb '23 (n=1,002), Sep '22 (n=1,000), May '22 (n=1,000), Feb '22 (n=1,004), 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), May '20 (n=610), Nov '19 (n=610), Jul '19 (n=615), Mar '19 (n=614)



TOP ISSUES OVER THE NEXT 5 YEARS

While longer-term concerns about *inflation* are significantly lower than current levels, around half of New Zealanders believe that it is the biggest issue the country will face over the next 5 years. New Zealanders also appear more concerned about *the economy* in the next 5 years than currently, while *petrol prices / fuel* present a more immediate concern. Despite not being in the top-5, *climate change* is slightly more of a future concern than a current one.



Q: What would you say are the three most important issues facing New Zealand today? / **Q**: What would you say are the three most important issues facing New Zealand over the next 5 years? **Base**: Total sample – Aug '23 (n=1,148)





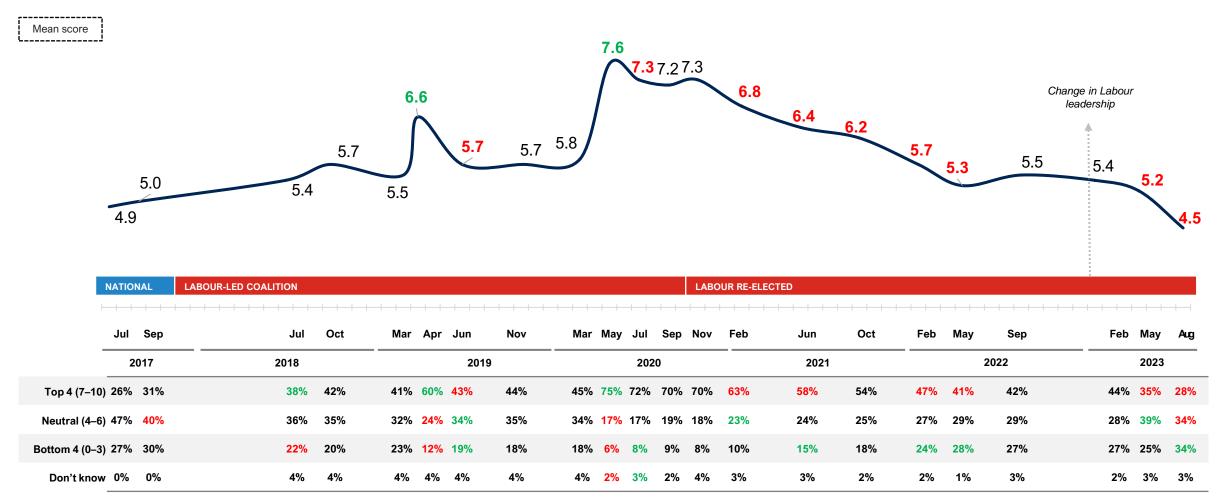
/ ▼ Indicates a significantly higher / lower compared to issues facing New Zealand now

CURRENT GOVERNMENSE PERFORMANCE



RATING OF GOVERNMENT OVER LAST 6 MONTHS

New Zealanders' rating of the Government's performance has significantly decreased since May 2023.



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: Total sample – Aug '23 (n=1,148), May '23 (n=1,002) Feb '23 (n=1,002), Sep '22 (n=1,000), May '22 (n=1,000), Feb '22 (n=1,004), 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

13 - © Ipsos | NZ Issues Monitor



MANAGING THE ISSUES

The political parties perceived as most capable of managing the issues



POLITICAL PARTY MOST CAPABLE OF MANAGING ISSUES

The National Party is perceived as most capable of managing all top-5 issues (up from 3 in the last fieldwork period in May '23). It also replaced Labour as the party seen to be most capable of managing *healthcare / hospitals*. National is currently perceived to be best placed to tackle 14 of these top-20 issues (an increase from 10 issues in the previous wave) while Labour is seen to be best placed to tackle just 2 (a decrease from 7 in the previous wave).

ISSUE	POLITICAL PARTY	ISSUE	POLITICAL PARTY
1: Inflation / cost of living	Ňational	10=: Transport / public transport / infrastructure	National
2: Crime / law & order	Ňational	12=: Race relations/racism	🔎 Labour
3: Housing / price of housing	Ňational	12=: Household / personal debt	National
4: Healthcare / hospitals	National	12=: Drug / alcohol abuse	National
5: The economy	Ňational	15: Environmental pollution	Green
6=: Climate change	Green	16: Unemployment	National
6=: Petrol prices / fuel	Ňational	17: Issues facing Māori	māpri
8: Poverty / inequality	🔎 Labour	18: Population / overpopulation	Don't know*
9: Education	Ňational	19=: Immigration	National
10=: Taxation	Ňational	19=: Defence / foreign affairs	National

Q: Please select the political party that you believe is most capable of managing each of the following issues: **Base:** Total sample – Aug '23 (n=1,148)

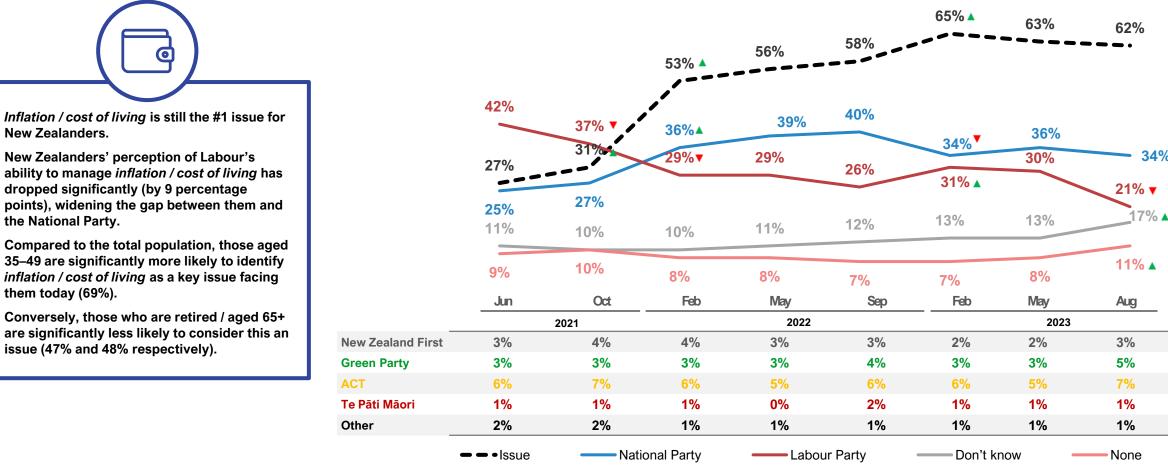
*Note: National was perceived as most capable behind 'don't know'



15 - © Ipsos | NZ Issues Monitor

#1 ISSUE – INFLATION / COST OF LIVING

National continues to be seen by New Zealanders as most capable of managing inflation / cost of living, while Labour's perceived capability has dropped significantly. Notably, there is an increase in the number of New Zealanders who are unsure of which party is most capable.



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

Base: Total sample – Aug '23 (n=1,148), May '23 (n=1,002) Feb '23 (n=1,002), Sep '22 (n=1,000), May '22 (n=1,000), Feb '22 (n=1,004), Oct '21 (n=1,003), Jun '21 (n=1,003)

New Zealanders.



34%

SUGGESTIONS TO IMPROVE COST OF LIVING ISSUES Voice of New Zealanders



"Reduce the cost of living for the middle class as they're paying the taxes and carrying the burden of the economy."

Bay of Plenty, working full time, NZ European



"Cost of living is making it difficult to live in New Zealand. A lot of professionals are moving abroad which will have a flow on effect on those still living here. I love this country but it's so expensive." Waikato, working part-time, NZ European–Māori



"Fix tax bracket creep; no one has had the justice and common sense to do this for YEARS. Average to middle NZ going into the highest tax rate is just plain wrong."

Canterbury, working full-time, NZ European



"Find solutions to bring prices lower of daily goods and needs of households. reduced income tax perhaps."

Canterbury, working full time, Asian



"Give more help middle income earners; who have been left out lately with not receiving any support but still having to bear the consequences of cost of living crisis."

Wellington, working full time, NZ European



"They need to lift benefits and give middle income families pay increases and tax cuts by increasing taxation of the wealthiest."

Manawatu-Whanganui, working full-time, NZ European



Q: What do you think the government needs to change or do differently to improve life in New Zealand? (open-ended question) **Base:** Aug '23 (n=1,148)

© Ipsos | NZ Issues Monitor

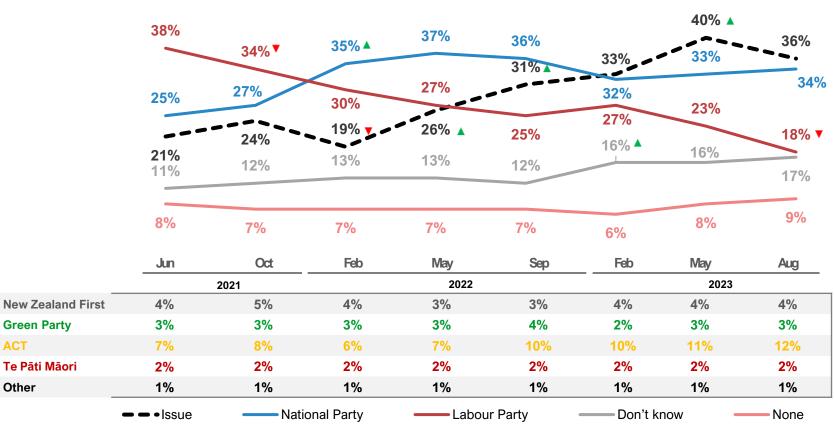
#2 ISSUE – CRIME / LAW & ORDER

New Zealanders continue to believe that National is the party most capable to manage *crime / law & order*. Confidence in Labour's ability to tackle *crime* has also decreased significantly this quarter.

Crime / law & order has remained the second most important issue for New Zealanders in Aug '23, despite a decrease by 4 percentage points from the previous wave in May '23.

New Zealanders continue to believe that National is the party most capable of managing this issue, while confidence in Labour has significantly decreased – further widening the gap between the two parties (to 16 percentage points).

Compared to the general population, Māori are significantly less likely to mention *crime / law & order* as an issue (27%).



Q: Please select the political party that you believe is most capable of managing each of the following issues: <u>Crime / law & order</u>

Base: Total sample – Aug '23 (n=1,148), May '23 (n=1,002) Feb '23 (n=1,002), Sep '22 (n=1,000), May '22 (n=1,000), Feb '22 (n=1,004), Oct '21 (n=1,003), Jun '21 (n=1,003)



SUGGESTIONS TO IMPROVE CRIME / LAW & ORDER ISSUES Voice of New Zealanders



"Toughen up on crime. People should be scared to be caught; knowing what will happen to them."

Hawke's Bay, retired, NZ European



"Treat everyone equally; criminals in prison keep society safer be more aspirational less red tape less bureaucratic rules running our lives."

Nelson / Marlborough, not in paid work & not seeking work, Māori



"Gang activities should be suppressed. A lot of youth crime was under the control of gang. Law and order in the community need to be restored the soonest."

Auckland City, working full-time, Asian



"Come down hard on criminals - on discounting of sending and stop anyone that is convicted of a violent crime"

Canterbury, working full-time, NZ European– Māori



"Crime needs to be treated as crime and criminals need to stop being treated as victims. More support for the victims of crime."

Waikato, not in pad work & not seeking work, NZ European



"Grant police and courts much stronger penalties for brazen crimes. No warnings for ram raid and similar offences."

Wellington, working full-time, NZ European

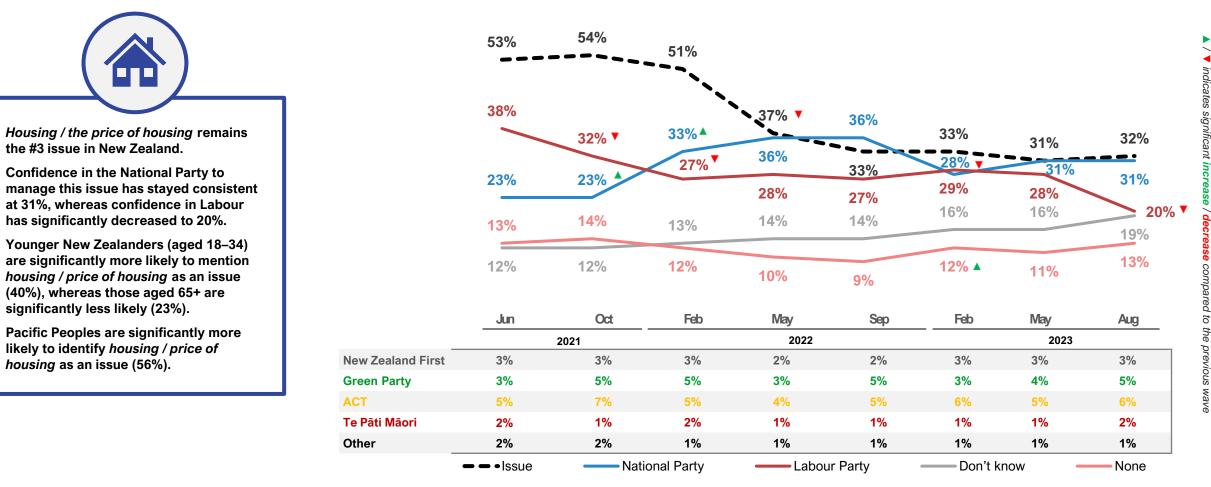
Q: What do you think the government needs to change or do differently to improve life in New Zealand? (open-ended question) *Base:* Aug '23 (n=1,148)

© Ipsos | NZ Issues Monitor



#3 ISSUE – HOUSING / PRICE OF HOUSING

New Zealanders' level of confidence in the National Party's ability to manage *housing / price of housing* remains steady. Meanwhile, Labour's perceived capability has dropped significantly.



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

Base: Total sample – Aug '23 (n=1,148), May '23 (n=1,002) Feb '23 (n=1,002), Sep '22 (n=1,000), May '22 (n=1,000), Feb '22 (n=1,004), Oct '21 (n=1,003), Jun '21 (n=1,003)



SUGGESTIONS TO IMPROVE HOUSING ISSUES

Voice of New Zealanders



"Mass low cost housing - giant basic apartment complexes so no one has to be homeless."

Wellington, working part-time, NZ European



"Make a cap on how much a rent can be to deter people buying houses to rent out therefore housing prices more stable and not inflating even more out of control."

Auckland City, working full-time, NZ European– Māori



"Build affordable housing. Stop overseas buying of our houses."

Canterbury, retired, NZ European



"Cap speculative housing ownership retrospectively and place a price ceiling on rental income relative to house factors."

Auckland City, working full-time, NZ European– Māori



"Improve on housing; infrastructure and public transport esp. with the rising population in New Zealand."

Auckland City, working full-time, Asian



"Stop the urbanisation sprawl instead; build up in the major cities where there is already public transport and amenities."

Auckland City, working part-time, NZ European

Q: What do you think the government needs to change or do differently to improve life in New Zealand? (open-ended question) **Base:** Aug '23 (n=1,148)

© Ipsos | NZ Issues Monitor



#4 ISSUE – HEALTHCARE / HOSPITALS

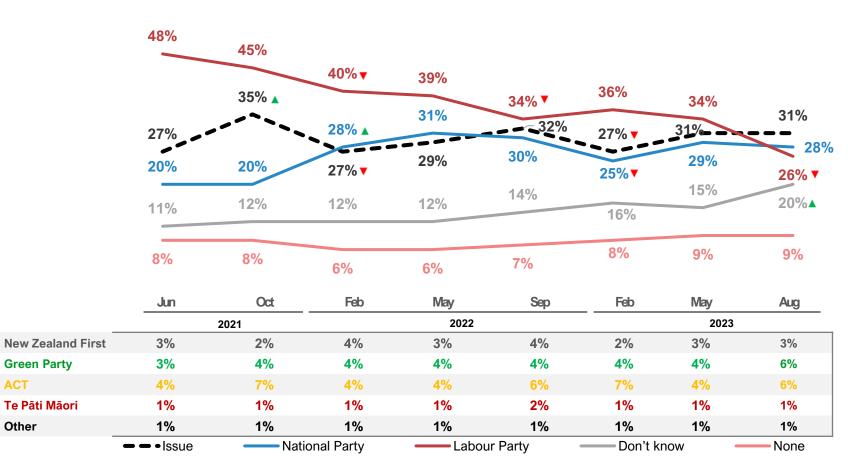
National replaced Labour as the party that New Zealanders believe is most capable of managing *healthcare / hospitals* for the first time since surveying began in 2018.

Healthcare / hospitals is the fourth most important issue facing New Zealanders.

Labour's perceived capability to manage this issue has decreased significantly to a record low of 26% and has been overtaken by National (28%) as the party perceived to be most capable of dealing with the issue for the first time since surveying began in 2018. Notably, 1 in 5 New Zealanders are unsure of which party is most capable – a significant increase from the previous wave.

Compared to the total population, younger New Zealanders (aged 18–34) are significantly less likely to mention *healthcare / hospitals* as an issue (19%). However, those aged 65+ and retired are significantly more likely to mention it as an issue (44%).

Māori (22%) and Pacific Peoples (16%) are significantly less likely to mention *healthcare / hospitals* as a top issue.

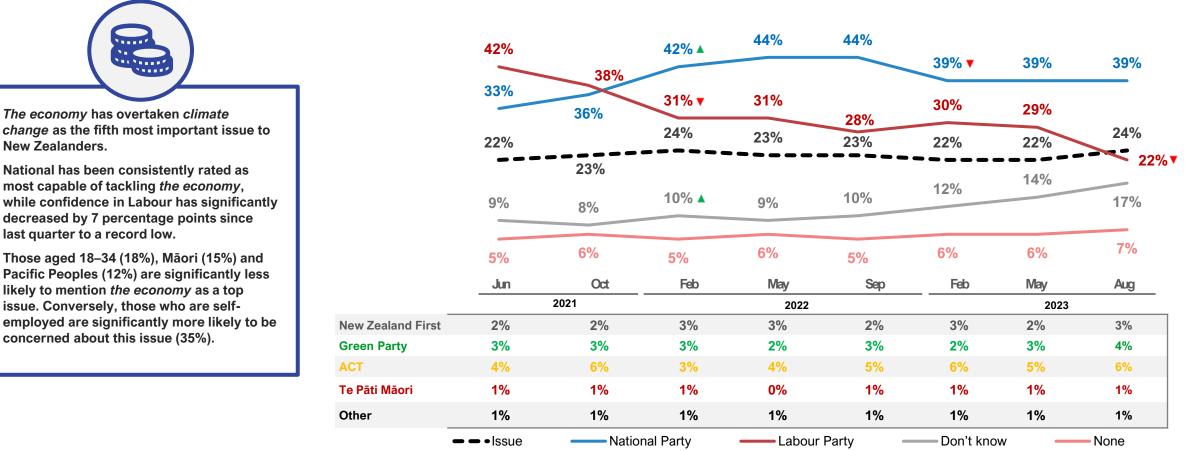


Q: Please select the political party that you believe is most capable of managing each of the following issues: <u>Healthcare / hospitals</u> Base: Total sample – Aug '23 (n=1,148), May '23 (n=1,002) Feb '23 (n=1,002), Sep '22 (n=1,000), May '22 (n=1,000), Feb '22 (n=1,004), Oct '21 (n=1,003), Jun '21 (n=1,003)



#5 ISSUE – THE ECONOMY

The economy has returned to the top-5 issues facing New Zealanders this wave & National continues to be the party seen as most capable of tackling the issue.



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

Base: Total sample – Aug '23 (n=1,148), May '23 (n=1,002) Feb '23 (n=1,002), Sep '22 (n=1,000), May '22 (n=1,000), Feb '22 (n=1,004), Oct '21 (n=1,003), Jun '21 (n=1,003)



COMPARING NEW ZEALAND'S ISSUES TO AUSTRALIA'S

TOP-10 ISSUES – NEW ZEALAND VS AUSTRALIA



Inflation / cost of living remains the number 1 issue by a considerable margin in both New Zealand and Australia, selected by over 60% of respondents as a top issue in both countries.

Australians continue to be much less concerned about *crime* (21%) compared to New Zealanders (36%) and they are also more concerned about *housing* (39%), *the economy* (32%), *personal debt* (11%) and *unemployment* (10%).

Meanwhile, New Zealanders are more focused *climate change* (21%), *petrol prices / fuel* (21%), *poverty / inequality* (16%), and *education* (8%).

Additionally, New Zealanders and Australians have similar levels of concerns around *healthcare* (31% and 29% respectively).

Base: Total sample – Aug '23 New Zealand (n=1,148), Jul '23 Australia (n=1,000)



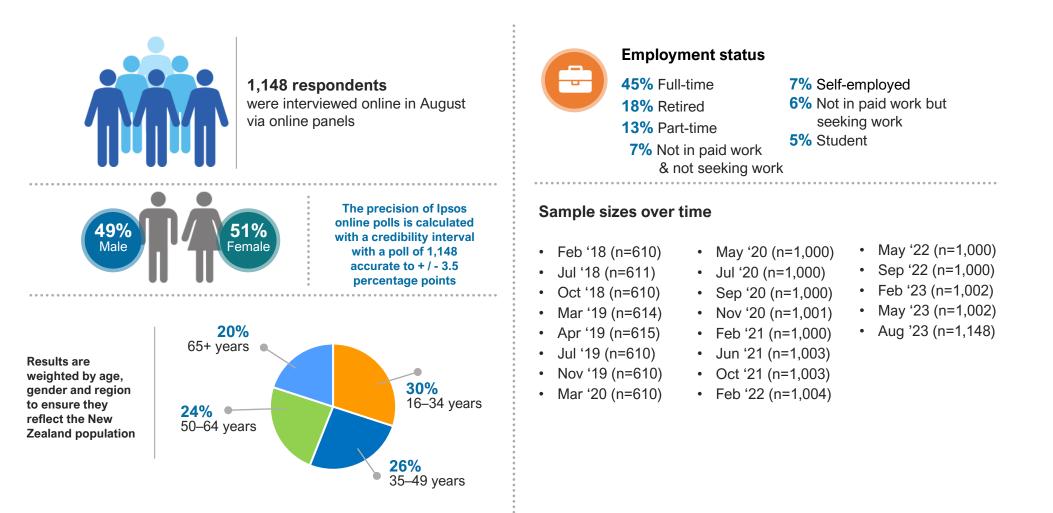
1	Inflation / cost of living	62%
2	Crime / law & order	36%
3	Housing / price of housing	32%
4	Healthcare / hospitals	31%
5	The economy	24%
6=	Climate change	21%
6=	Petrol prices / fuel	21%
8	Poverty / inequality	16%
9	Education	8%
10=	Taxation & Transport / public transport / infrastructure	7%



1	Cost of living	62%
2	Housing	39%
3	The economy	32%
4	Healthcare	29%
5	Crime	21%
6	Petrol prices	15%
7	Poverty	13%
8	Environment	12%
9	Personal debt	11%
10	Unemployment	10%



SAMPLE DEMOGRAPHICS – AUG 2023





26 – © Ipsos | NZ Issues Monitor

Where results do not sum to 100 or the 'difference' appears to be + / -1 more / less than the actual, this may be due to rounding, multiple responses or the exclusion of 'don't know' or 'not stated' responses.

THE TEAM

Carin Hercock Managing Director carin.hercock@ipsos.com +64 21 394 508

Amanda Dudding

Research Director amanda.dudding@ipsos.com +64 21 612 264

Kania Sugandi Associate Director Aidan Fenwick Research Manager Sarah McGruddy Research Executive



ABOUT IPSOS

Ipsos is the third-largest market research company in the world, present in 90 markets and employing more than 18,000 people.

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).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP www.ipsos.com

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



