THE IPSOS NEW ZEALAND ISSUES MONITOR

An Ipsos Survey – October 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 25 September – 2 October we conducted fieldwork for our 22nd Ipsos NZ Issues Monitor report with a total of 1,000 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 survey is calculated with a credibility interval with a sample of 1,000 accurate to + / - 3.1 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 during fieldwork?

PROTEST •

Parliament protest: Streets closed, police patrolling streets, counterprotest planned as Wellington braces for disruption Tova podcast: Cross bench chaos - ACT and NZ First clash over what their future government might look like •

Tova O'Brien • 05:00, Sep 28 2023

0 💟 😏 😂



Warning around fake oxycodene pills issued after death of man in Napier •

Marty Sharpe • 18:19, Sep 27 2023

f 🕑 🚭 🛛

'It's pretty easy to generate growth if Govt is doing all the spending': How bad is the

👩 🔯

Weather: Severe gales and economy, really? • heavy rain on the way for Susan Edmunds • 05:00, Sep 26 2023 central, southern areas •

Shilpy Arora . 07:39, Oct 02 2023



Election 2023: Advance voting and everything else you need to know about casting your vote



KEY FINDINGS – SEPTEMBER 2023

TOP ISSUES IN NEW ZEALAND

Inflation / cost of living remains the most important issue for New Zealanders. It has been the top issue since February 2022.

Crime / law & order retains its position as the #2 issue, where it's been sitting since May this year after a steady climb.





Healthcare / hospitals sits in third place, at a very similar level to *housing / cost of housing* which have both been fairly stable since September 2022.

Concerns about *petrol prices / fuel* have risen steadily since May, and the issue has re-entered the top-5, alongside *the economy*.





GOVERNMENT PERFORMANCE & POLITICAL PARTIES' CAPABILITY TO MANAGE ISSUES

New Zealanders' rating of the Government's performance has stabilised, increasing very slightly after a steady decline since the highs of 2020.

When asked about the party best placed to tackle the country's biggest issues, New Zealanders continue to 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*), however, Labour has made significant increases in their perceived capabilities in handling *inflation / cost of living, the economy* and *fuel prices*.

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 continues to be the primary concern for New Zealanders as we approach the general election. Issues such as *crime*, *housing / price of housing*, and *healthcare* have remained steady since May 2023. Rising concerns over *petrol prices* have now placed it alongside the *economy* as the fifth most significant issue for New Zealanders.



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

Base: Total sample – Sep '23 (n=1,000), 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)

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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. Concerns for *crime* / law & order, housing / price of housing and healthcare / hospitals remain stable. The economy and petrol prices are the 5th equal most important issues.

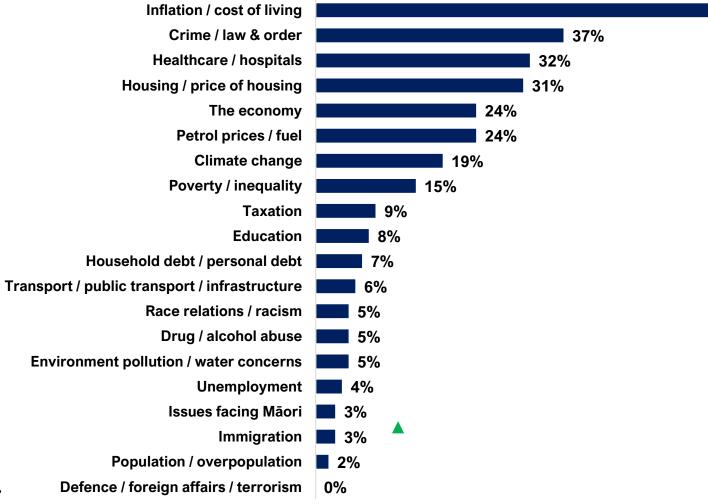
Those under the age of 50 are significantly <u>more</u> concerned about *inflation / cost of living* (68%).

50-64 year olds (45%), those living in Auckland City (45%) and those who are retired (46%) are significantly <u>more</u> concerned about *crime / law and order*. Conversely, 16-34 year olds (27%), those living in Wellington (25%) and Māori (24%) are significantly <u>less</u> concerned about the issue.

New Zealanders aged 50+ are significantly <u>more</u> concerned about *healthcare / hospitals* (40%), while those aged 16-34 are significantly <u>more</u> concerned about *housing / price of housing* (42%).

Those living in Waikato are significantly <u>more</u> concerned about *petrol prices / fuel* (35%), while Wellingtonians are significantly <u>less</u> concerned about it (13%)

Q: What would you say are the three most important issues facing New Zealand today? **Base:** Total sample – Sep '23 (n=1,000)



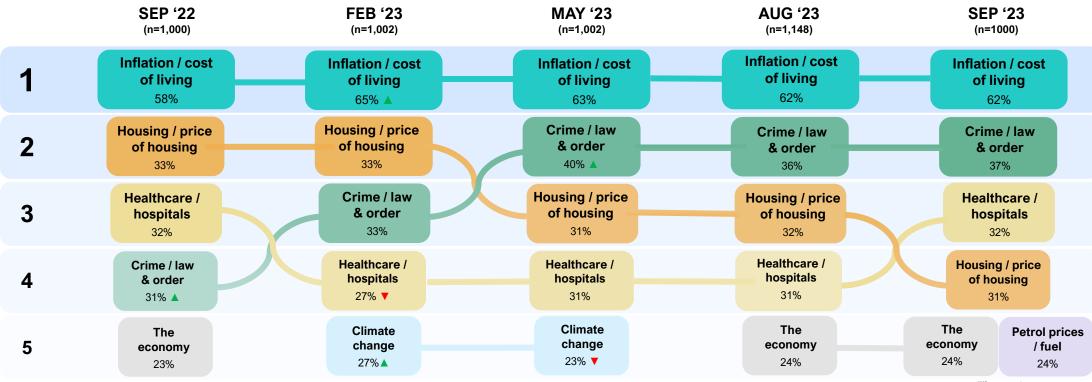
indicates significant **increase / decrease** compared to the previous wave

62%



TOP-5 ISSUES

For the past year, New Zealanders have been most worried about *inflation / the cost of living*. During this time, concerns about *crime / law and order* have risen, though they have remained relatively stable since May 2023. Compared to this time last year, *crime / law & order* has switched places with *housing / price of housing*. While the four main concerns haven't changed from the previous measure, the *cost of petrol / fuel* has once again made its way into the top five, tying with the economy.



5th equal

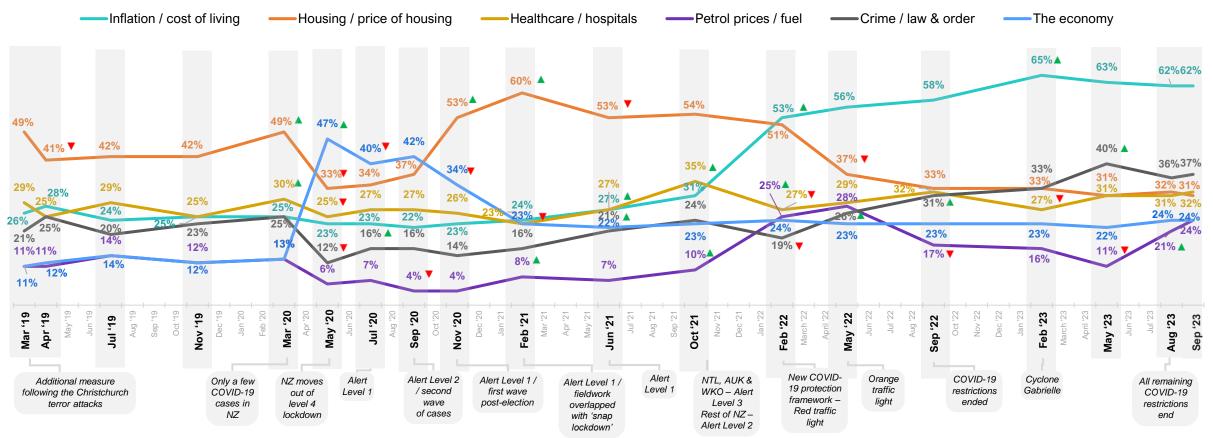
Q: What would you say are the three most important issues facing New Zealand today?

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



TOP-5 ISSUES OVER TIME

The gap between the top issue, *inflation / cost of living*, and the second-ranked issue, *crime / law & order*, is still large, as New Zealanders' level of concern around both issues has remained steady since the last measure in August 2023. Concerns for *housing / price of housing* and *healthcare / hospitals* have also remained relatively stable since May 2023. *The economy*, also stable with August 2023, is now tied for fifth place with *petrol prices / fuel*.



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

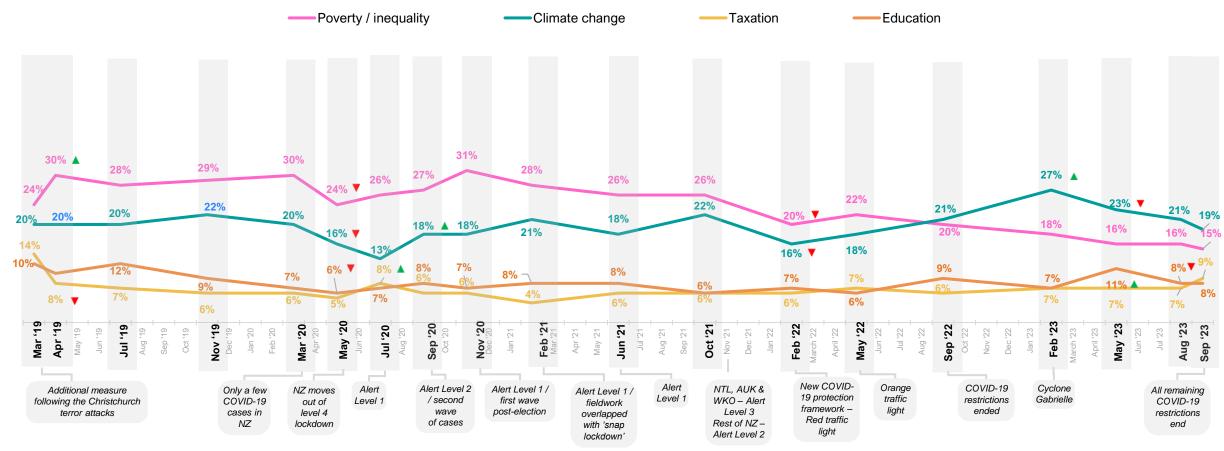


Base: Total sample – Sep '23 (n=1,000), Aug '23 (n=1,148), May '23 (n=1,002), Feb '23 (n=1,002), Sep '22 (n=1,000), May '22 (n=1,000), Feb '22 (n=1,004), Oct '21 (n=1,003), Jun '21 (n=1,003), Feb '21 (n=1,000), Nov '20 (n=1,001), Sep '20 (n=1,000), Jul '20 (n=1,000), May '20 (n=1,000), Mar '20 (n=610), Nov '19 (n=610), Jul '19 (n=610), Apr '19 (n=615), Mar '19 (n=614)



NOTEWORTHY ISSUES

People are now more worried about *climate change* than they were before the 2020 general election, but concern is still lower than its peak of 27% in February 2023. New Zealanders' concern for *poverty / inequality* has continued to trend downwards, a significant difference from its September 2020 level of 27%. *Taxation*, often discussed during election cycles, has seen a small increase in concern, and it is now considered a bigger issue than education.



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

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Base: Total sample – Sep '23 (n=1,000), 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), Jul '19 (n=610), Apr '19 (n=615), Mar '19 (n=614)



indicates significant incr

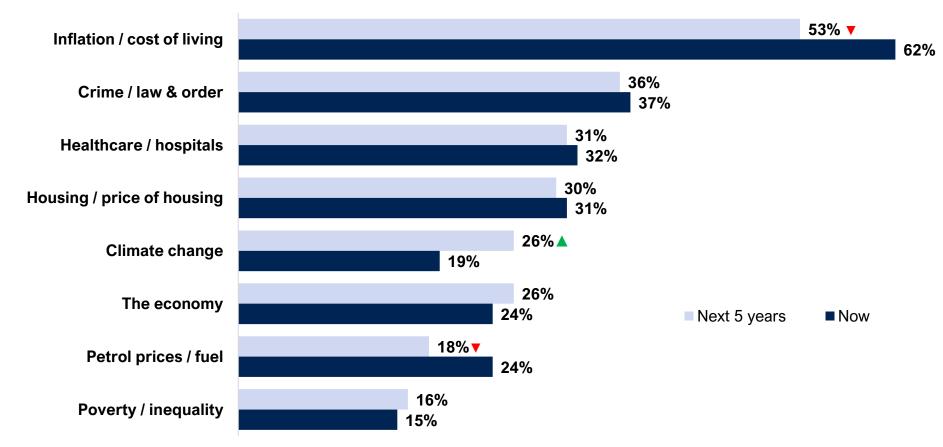
compared to

the

previous wave

TOP ISSUES OVER THE NEXT 5 YEARS

Even though *climate change* is not in the top-5 issues concerning New Zealanders today, it is significantly more of a big worry for the future, with one of four expressing concern. In contrast, while fewer people are concerned about *inflation* in the long term compared to today, half of New Zealanders still believe that it will be the biggest issue facing New Zealand over the next 5 years.



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 – Sep '23 (n=1,000)

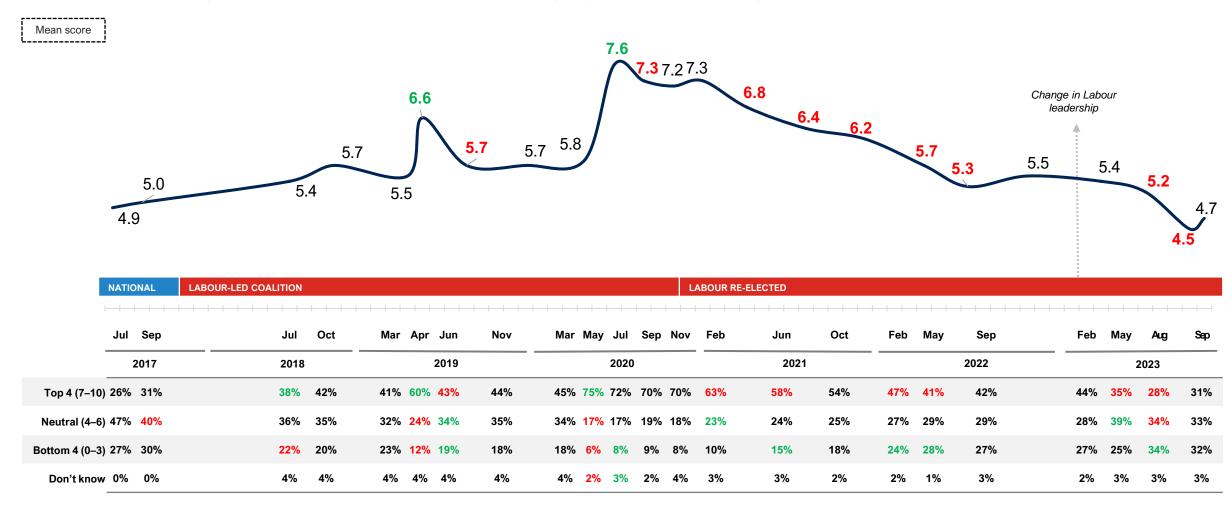


CURRENT GOVERNMENSE PERFORMANCE



RATING OF GOVERNMENT OVER LAST 6 MONTHS

New Zealanders' rating of the Government's performance has slightly increased since August 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 – Sep '23 (n=1,000), 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

Green / red Indicates significant increase / decrease compared to the previous wave



MANAGING THE ISSUES

The political parties perceived as most capable of managing the issues



POLITICAL PARTY MOST CAPABLE OF MANAGING ISSUES

New Zealanders still believe that the National Party is most capable of managing the top five issues. The National Party is also now perceived to be best placed to address 15 of these top-20 issues (an increase by one issue as in the previous wave, New Zealanders weren't sure which party is best placed to tackle *population / overpopulation*).

ISSUE	POLITICAL PARTY	ISSUE	POLITICAL PARTY
1: Inflation / cost of living	National	11: Household / personal debt	National
2: Crime / law & order	National	12: Transport / public transport / infrastructure	National
3: Healthcare / hospitals	National	13=: Race relations/racism	🔎 Labour
4: Housing / price of housing	National	13=: Drug / alcohol abuse	National
5=: The economy	National	13=: Environmental pollution	Green
5=: Petrol prices / fuel	National	16: Unemployment	National
7: Climate change	Green	17=: Issues facing Māori	māpri
8: Poverty / inequality	🖋 Labour	17=: Immigration	National
9: Taxation	National	19: Population / overpopulation	National
10: Education	National	20: 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 – Sep '23 (n=1,000)



indicates significant incre compared to the previous

Wave

#1 ISSUE – INFLATION / COST OF LIVING

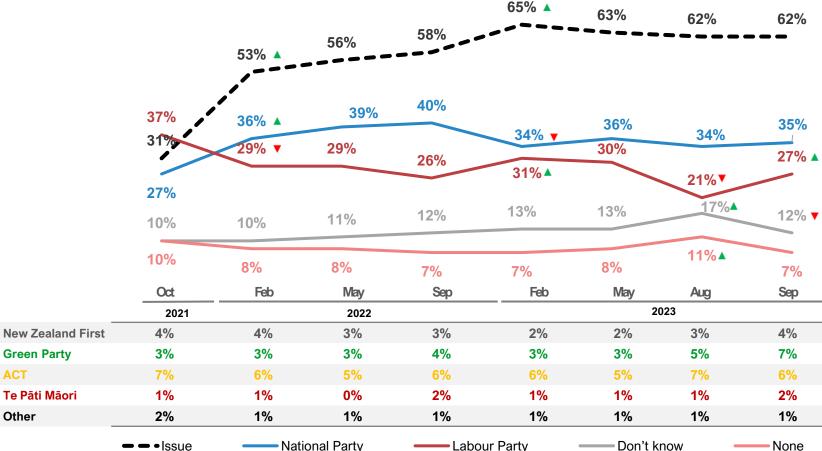
National continues to be seen by New Zealanders as most capable of managing *inflation / cost of* living. Despite Labour's perceived capability significantly increasing since August 2023, National still leads by 8 percentage points. The proportion of people saying they don't know which party is most capable of managing *inflation / cost of living* has decreased by 5 percentage points from August 2023.

Inflation / cost of living remains the #1 issue for New Zealanders.

New Zealanders' perception of Labour's ability to manage *inflation / cost of living* has increased significantly (by 8 percentage points), reducing the gap between them and the National Party.

Compared to the total population, those aged 16-34 are significantly more likely to identify *inflation / cost of living* as a key issue facing them today (69%).

Conversely, those aged 50+ are significantly <u>less</u> likely to consider this an issue (46% and 54% respectively).



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 - Sep '23 (n=1,000), 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)



SUGGESTIONS TO IMPROVE COST OF LIVING ISSUES Voice of New Zealanders



Re-evaluate tax for things and on peoples' income; looking out for the middle class- not rich but just getting by, but not being able to qualify for any help from the government."

Wellington, working full time, NZ European



"Cost of living is through the roof. The cost of petrol and HEALTHY food needs to reduce. Wages for the middle class are not increasing at the rate of cost of living. Childcare is way too expensive with no subsidies for middle class. Sometimes with tax and childcare its not worth working. Sort the banks out; interest rates should not be so high while banks are making record profit."

Canterbury, 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:** Sep '23 (n=,1000)



"We need to get on top of the cost of living. Supermarkets and fuel companies should be help accountable."

Auckland, working full time, NZ European



"Write off beneficiary debt. Cap the rent landlords can charge. Lower food and petrol prices. Increase the tax of the wealthy. Harsher sentences for crime including youth crime."

Hawke's Bay, working part time, Māori



"I don't know how; but sort out inflation and the crippling cost of living. Provide incentives for young people to stay in the country and be a professional. Entice offshore medical people into our country. Lower fuel prices."

Auckland, working full time, Asian



#2 ISSUE – CRIME / LAW & ORDER

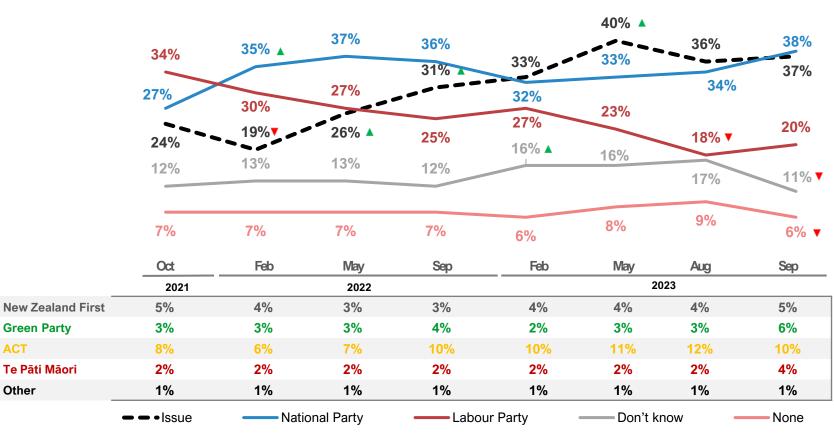
Since February 2023, the number of New Zealanders who consider National to be the party most capable of managing *crime / law & order* has increased. Meanwhile, significantly fewer people said they don't know which party is most capable of managing *crime / law* has compared to August 2023.

Crime / law & order has remained the second most important issue for New Zealanders, stable with August '23.

Compared to August '23, more New Zealanders believe that National is the party most capable of managing this issue. Notably, less New Zealanders are unsure of which party is most capable – a significant decrease from the previous wave.

Compared to the general population, 50-64 year olds (45%), people in Auckland City (45%) and those who are retired (46%) are significantly <u>more</u> likely to mention *crime / law and order* as an issue.

16-34 year olds (27%), people in Wellington (25%) and Māori (24%) are significantly <u>less</u> likely to mention *crime / law and order* as an issue.



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 – Sep '23 (n=1,000), 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)



SUGGESTIONS TO IMPROVE CRIME / LAW & ORDER ISSUES

Voice of New Zealanders



"I am concerned with the level of crime happening in our society. We really need to get the law and order on track.

Auckland, working full time, Asian



"Reduce crime. Make those pay for their crime and not just house detention. Reduce the age re minor age. Remove all overstayers."

Auckland, working full time, NZ European



"They need to crack down hard on crime by treating youth as adults in the justice system and reintroduce the death penalty." Auckland, not in paid work but seeking work, 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:** Sep '23 (n=1,000)



"Sort out the rising cost of living; housing; petrol. Stricter penalties for ram raids and juvenile crime; particularly."

Bay of Plenty, retired, NZ European



"Address crime rates with preventative work for youth and harsher penalties."

Wellington, working full time, NZ European



"Bring the crime rate down and especially with young people by giving more harsher penalties and increase police on the beat."

Wellington, retired, NZ European



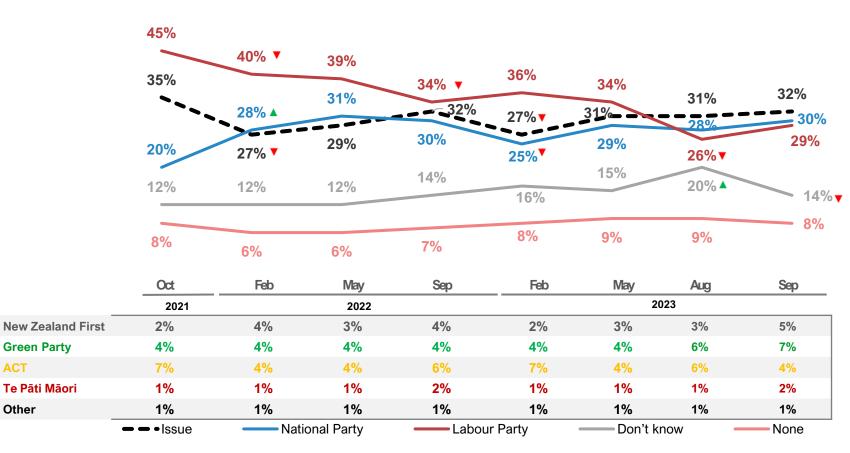
#3 ISSUE – HEALTHCARE / HOSPITALS

New Zealanders' trust in both National's and Labour's abilities to manage *healthcare / hospitals* has increased, with National remaining the party seen to be most capable by 1-percentage point ahead of Labour.

Healthcare / hospitals is the third most important issue facing New Zealanders, ranked just above *housing / price of housing* by 1 percentage point.

National's perceived capability to manage this issue has increased from August '23 to become the highest level of support the party has seen since September '22. Labour's perceived capability has also increased from August '23, though it remains 1 percentage point behind National. Notably, fewer New Zealanders are unsure of which party is most capable – a significant decrease from the previous wave.

Compared to the total population, women (38%) and those aged over 50 (40%) are significantly <u>more</u> likely to mention *healthcare / hospitals* as an issue. Men (25%) and those aged under 50 (26%), as well as those who live in Auckland City (22%) are <u>less</u> likely to mention *healthcare / hospitals* as an 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 – Sep '23 (n=1,000), 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)



SUGGESTIONS TO IMPROVE HEALTHCARE ISSUES

Voice of New Zealanders



"Healthcare system and availability and cost needs to be open to all ethnicities and people." Taranaki, student in paid-employment, NZ

Taranaki, student in paid-employment, NZ European



"Inject more money into the health sector as in raising wages; incentives for medical staff from over sea's to work and live here and take off the red tape immigration restrictions to make it easier."

Greater Auckland, working part-time, Māori-Pacific



"Increase health care resources: Governments can strengthen health care systems; increase investment in health care resources; and ensure universal access and quality of health care services. This also includes strengthening mental health support and preventive care measures"

Taranaki, working full-time, NZ European



"Listen to the people and their needs. That's where they need to start. More funding into healthcare; mental health and schooling."

Canterbury, working full-time, NZ European



"Address inequality through improvements in access to housing; wage parity; benefits; employment; and mental health and wellness outcomes."

Auckland City, working-full time, Pacific



"There are so many things. Fix health for a start."

Waikato, working-full time, NZ European-Māori

Q: What do you think the government needs to change or do differently to improve life in New Zealand? (open-ended question) *Base:* Sep '23 (n=1,000)



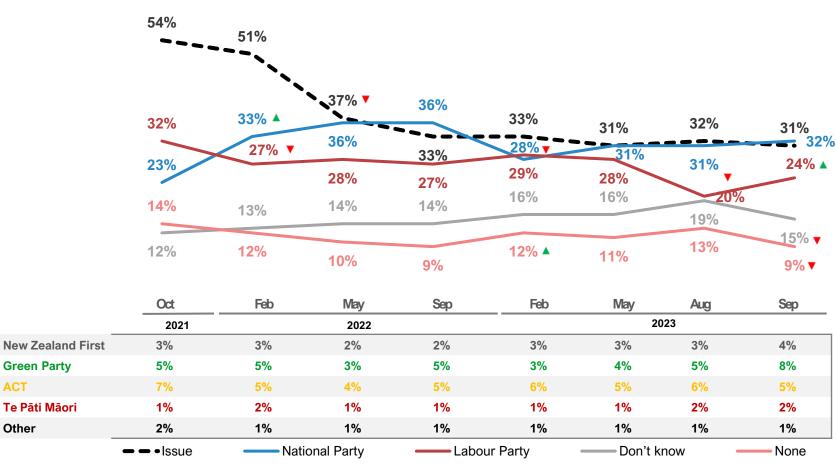
#4 ISSUE – HOUSING / PRICE OF HOUSING

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 increased significantly, recovering some of its trust lost by the public in August. Despite this, fewer New Zealanders consider Labour to be the most capable party of managing *housing / price of housing* compared to a year ago.

Housing / the price of housing remains was overtaken by *healthcare* / *hospitals* by just 1-percentage point to become the #4 issue in New Zealand.

Confidence in the National Party to manage this issue has remained stable. Confidence in Labour has increased compared to August '23, increasing by 4percentage points, though this number remains lower than the number of people who had confidence in Labour earlier in the year.

Younger New Zealanders (aged 18–34), 42%, are significantly more likely to mention *housing / price of housing* as an issue (31%).



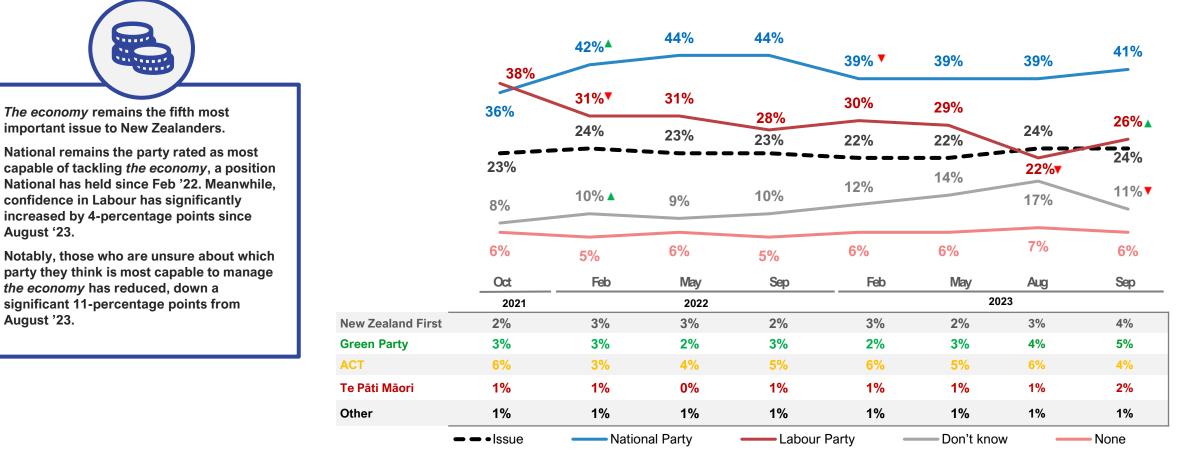
Q: Please select the political party that you believe is most capable of managing each of the following issues: <u>Housing / price of housing</u>

Base: Total sample – Sep '23 (n=1,000), 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)



#5 ISSUE – THE ECONOMY

National continues to be the party seen as most capable of managing the *economy*, stable since February 2022. Compared to August 2023, significantly more people consider Labour as most capable, while significantly less reported don't know.



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

Base: Total sample – Sep '23 (n=1,000), 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)



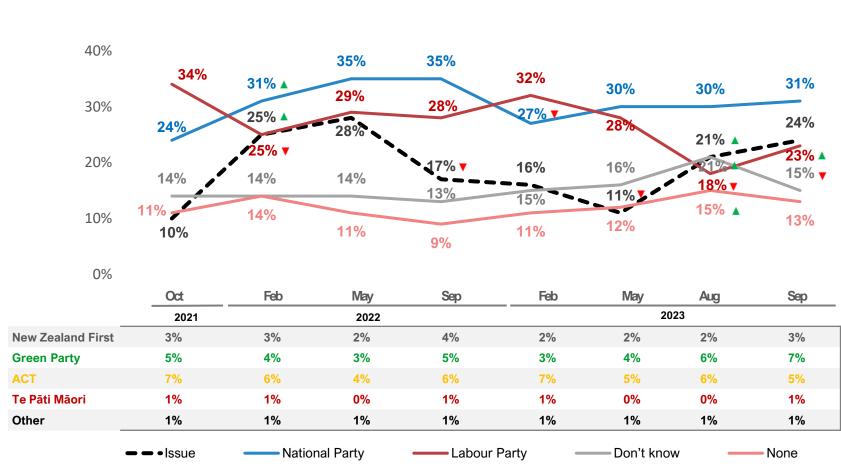
#5 ISSUE – PETROL PRICES / FUEL

National remains the party seen as most capable of managing *the economy*, stable since May '23. Compared to August '23, significantly more people consider Labour as most capable, while significantly less reported don't know.

Over a year later, *petrol prices / petrol* has re-entered the top-5 most important issues to New Zealanders, placing equal with *the economy*.

National remains the party rated as most capable of tackling *petrol prices / petrol*,a position National has held since May '23. Meanwhile, confidence in Labour has significantly increased by 5-percentage points since August '23.

Notably, those who are unsure about which party they think is most capable to manage *petrol prices / fuel* has reduced, down a significant 6-percentage points from August '23.



Q: Please select the political party that you believe is most capable of managing each of the following issues: <u>Petrol prices/fuel economy</u>

Base: Total sample – Sep '23 (n=1,000), 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)

50%



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* (18%) compared to New Zealanders (37%) and they are also more concerned about *housing* (38%), *the economy* (28%), *personal debt* (10%) and *unemployment* (9%).

Meanwhile, New Zealanders are more concerned about *petrol prices / fuel* (24%), taxation (9%), and *education* (8%).

New Zealanders and Australians have similar levels of concern around *healthcare* (32% and 30% respectively), and climate change (19% and 18% respectively).



1	Inflation / cost of living	62%
2	Crime / law & order	37%
3	Healthcare / hospitals	32%
4	Housing / price of housing	31%
5=	The economy	24%
5=	Petrol prices / fuel	24%
7	Climate change	19%
8	Poverty / inequality	15%
9	Taxation	9%
10	Education	8%

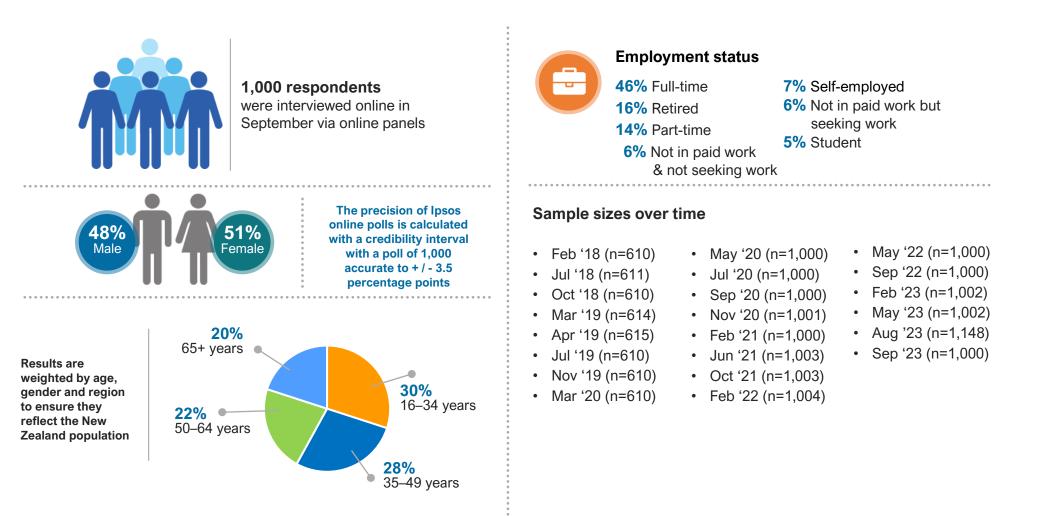


1	Cost of living	62%
2	Housing	38%
3	Healthcare	30%
4	The economy	28%
5=	Crime	18%
5=	Environment	18%
7	Petrol prices	17%
8	Poverty	16%
9	Personal debt	10%
10	Unemployment	9%

Base: Total sample – Sep '23 New Zealand (n=1000), Sep '23 Australia (n=1,000)



SAMPLE DEMOGRAPHICS – SEP 2023





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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.

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GAME CHANGERS

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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.



THANK YOU



