

BUILDING PERFORMANCE



The COVID-19 pandemic and its impact on building system actors

TECHNICAL REPORT | SEPTEMBER 2021



MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

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Online: ISBN 978-1-99-100880-0

SEPTEMBER 2021

Ipsos New Zealand was commissioned to conduct this research project. Support throughout this project was provided by the MBIE project team: Dr Alice Cleland, Dr Iman Khajehzadeh, Nicolette Edgar, and Adrian Bennett.

Please cite the report as: Ipsos (2021). *The COVID-19 pandemic and its impact on building system actors. Technical Report September 2021*. Wellington: MBIE.

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Background

2020 and 2021 have seen the world's social, cultural and economic systems come under significant stress due to the COVID-19 pandemic. In New Zealand, this has included periods of time in which businesses either did not operate at all, or could only operate under specific restrictions. Similar restrictions have also been applied to businesses in other countries by their respective governments, thereby reducing their production of products imported by New Zealand, as well as their demand for New Zealand's export products. Additionally, the significant reduction on cross-border travel between New Zealand and the rest of the world has had a negative impact on the flow of people and products between New Zealand and other countries. Therefore, the impact of the COVID-19 pandemic has been major.

Within this challenging environment, and since the arrival of the pandemic, a priority area for the Ministry of Business Innovation and Employment (MBIE) has been to ensure a strong recovery from the impact of the COVID-19 pandemic on New Zealand's economy.

One part of the New Zealand economy that has experienced challenges is the building and construction sector. The issues facing the sector have been widely reported (Braae, 2021), and there is much existing industry data and research available to confirm that there are issues (e.g., BDO New Zealand, 2020; Duncan Cotterill, 2020; KPMG, 2020; Ministry of Social Development, 2020; New Zealand Foreign Affairs & Trade, 2021; New Zealand Government, 2021a; New Zealand Infrastructure Commission (Te Waihanga), 2021; Plessis & Simpson, 2021; Statistics New Zealand, 2020, 2021a, 2021b). Notably, similar challenges faced by the sector in others countries had also been reported (Alsharef et al., 2021; Gamil & Alhagar, 2020; Majumder & Biswas, 2021).

Research purpose

While there is some understanding of the challenges facing the sector, information gaps still remained. For example, most existing research on the building and construction industry had not, until now, explored the potential impacts of the COVID-19 pandemic on the End-Users within the building system. A holistic approach to understanding the impact of the COVID-19 pandemic on the building system was also wanted.

The purpose of this research was, therefore, to provide insights to help the sector address the disruptions created by the COVID-19 pandemic. Specifically, MBIE wanted to understand the impacts across performance, people, processes and products (MBIE's '4Ps framework') and the resulting implications on social, environmental and economic well-being.

MBIE wanted to gain this understanding from the full range of building and construction system stakeholders (actors), defined as Businesses within the building sector, building system Workers, and private End-Users (such as current or would-be homeowners).

The research was therefore conducted to provide MBIE with statistically robust information about the extent and nature of the issues facing the building system as a result of the COVID-19 pandemic.

Methodology

Stage 1 – Qualitative exploration

The **objective** of Stage 1 was to conduct a ‘sense-check’ of the issues at play. By qualitatively exploring the issues with a small but varied range of actors in the building system, the researchers were able to proceed to the quantitative phase with greater surety about asking the ‘right questions, in the right manner’.

- **12 Construction-Sector Workers** from a wide range of sectors throughout New Zealand were interviewed via formal screening questionnaires and interviewed one-on-one via 1-hour interviews on MS Teams or Zoom, between 30 March and 22 April 2021.
- **10 Residential End-Users** from throughout New Zealand were interviewed via two 90–120-minute MS Teams focus group discussions held on April 8 and 9 2021.

For both methodologies, **discussion guides** were used to guide but not control the discussion flow. These guides were structured around MBIE’s ‘4Ps framework’ (performance, people, processes and products).

Stage 2 – Quantitative survey

The **objective** of Stage 2 was to quantify the current and possible future impacts of the COVID-19 pandemic across the three actor groups (Businesses, Workers and End-Users). The **surveying method** was online, via a core questionnaire adjusted to suit each distinct sample group. The questionnaire took an average of 11 minutes to complete. Fieldwork was completed between 3 June to 9 July 2021.

Multiple **sample sources** and both online and hard-copy postal channels were used to maximise response rates, cost-effectiveness, sample diversity and sample robustness for each sample group. The survey sample groups and subgroups were as follows:

- **Business:** The business group was represented by people who owned or managed a business or those who were a senior manager / key decision maker of a business in the building and construction sector at the time of the survey.
- **Worker:** The worker group was defined as people who were employed in the commercial building and construction sector, but were not a senior manager, owner or decision maker at the time of the survey.
- **End-user:** The end-user group was defined as people who were not professionally involved in the building and construction sector in any way at the time of the survey. The End-user group was further broken to the following sub-groups:
 - **Current/ Recent Builders:** People who chose the options ‘*I am currently having a new home built for me*’ or ‘*I built (or had built for me) a new home that was finished after the Level 4 lockdown in March-April 2020*’.
 - **Build Delayers:** People who chose the option ‘*I had plans to build a new home last year or this year, but starting the work has been cancelled or delayed due to COVID-19*’.

- **Current/ Recent Renovators:** People who chose the options ‘I have had some renovations completed on a home since the Level 4 lockdown in March-April 2020’ or ‘I have had some renovations started on a home since the Level 4 lockdown in March-April 2020’.
- **Renovation Delayers:** People who chose the option ‘I had plans to renovate sometime since last March, but starting the work has been cancelled or delayed due to COVID-19’.
- **Build Planners:** People who chose the option ‘I am planning to have a new home built in the next 18 months’.
- **Renovation Planners:** People who chose the option ‘I am planning to renovate a home in the next 18 months’.
- **Homeowners:** People who chose the option ‘I own a home but do not fit into any of the categories above’.

An overview of the achieved sample is outlined in Table 1.

Table 1: Fieldwork results - overview of the achieved sample.

	Total	Business sample	Worker sample	End-User sample				
				Total	Homeowners	Current/recent home builders/renovators	Build/Renovation delayers	Build/Renovation planners
Number of respondents	3856	1118	1038	1700	500	500	200	500

Section 1: Paperwork, Processes and Procedures

Summary

All aspects related to *Paperwork, Processes and Procedures* were significantly more likely to have become worse since the COVID-19 pandemic for Businesses, Workers and End-Users alike.

Key Qualitative Results¹

Businesses and **Workers** were experiencing an increased level of complexity in running their daily operations. All procedural aspects were reportedly harder to manage, particularly delays with council paperwork and difficulties in sourcing products, both of which had flow-on effects to most aspects of project and business management.

There were reports of councils becoming slower at all processes, titles, inspections and being especially challenging during and following the Alert Level 4 lockdown. The suggested reasons for this included general understaffing combined with a building boom; increased strictness due to higher standards and increased use of new staff operating more 'by the book'; and high staff turnover leading to inspection inconsistencies and frustrating / costly rework.

As processes and project management got disrupted, it has become harder to have the right person doing the right work at the right time, causing quality or process problems.

End-Users were finding it harder to find tradespeople and to get quotes. Delays in building consents and inspections, and increased difficulties in getting loans were also reported.

Key Quantitative Results

The overall theme of this section was that while one-third encouragingly reported that aspects related to *Paperwork, Process and Procedures* had not changed since the COVID-19 pandemic, those reporting change were considerably more likely to mention deterioration rather than improvement.

Overall, the areas reported to have experienced the greatest deterioration were:

- getting quotes from product suppliers
- getting quotes from service suppliers
- getting building consents granted.

Businesses were generally the most likely to report issues, largely because they were also more likely to have the experience on which to give an informed answer. In contrast, End-Users and Workers were understandingly less likely to know how these factors had changed. Businesses were twice or more as likely to report a given factor as having got worse than got better.

Workers were the most likely to report delays *getting quotes from product suppliers*. However, they appeared to be less affected in general, as their perceptions of issues having got worse or better were roughly equal.

¹ Please note that the qualitative research was conducted to inform the development of the quantitative questionnaires, and does not have the quantitative robustness required for accurate extrapolation to the overall sector.

End-Users were the most likely to report delays in *getting quotes from service suppliers*. The proportion of those reporting that ‘things have got better’ was consistently smaller than the number of those perceiving that ‘things have got worse’.

The areas least affected for each of the three main sample groups were *getting titles, drawings and council records* and *getting finance and/or loans approved* – but these were still reported as being worse than before COVID-19 by around a fifth or more.

In conclusion, all aspects related to *Paperwork, Processes and Procedures* were significantly more likely to have become worse rather than better, for Businesses, Workers and End-Users alike.

Additional Detail

Detailed, annotated tables showing differences amongst sub-samples (where statistically-significant differences exist) for this section can be found in Appendix C, tables 2-5.

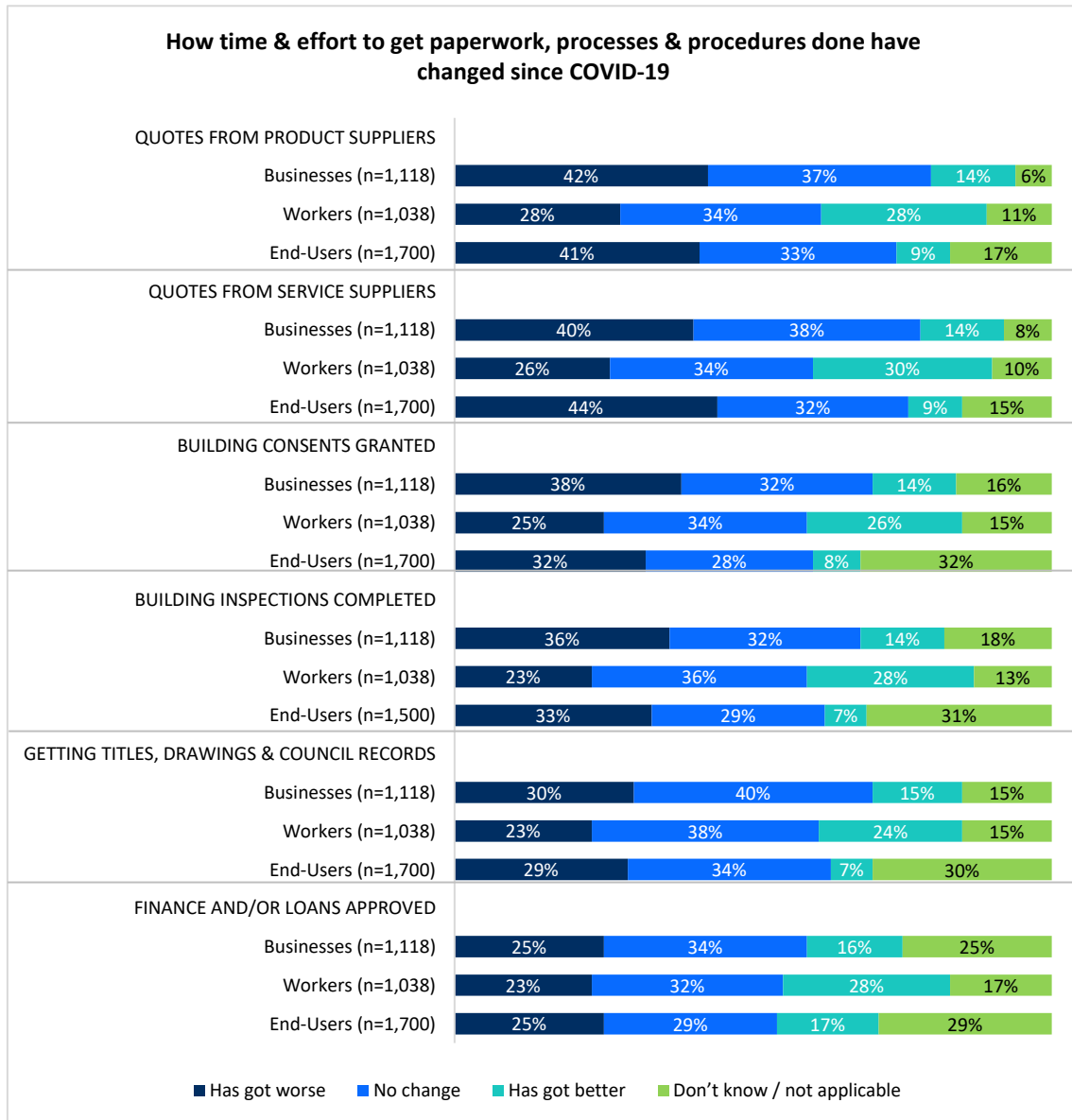
Time and effort taken to get paperwork, processes and procedures done

(Questions QB1/WB1/HC1/HD1/HE1 asked of Businesses, Workers and End-Users)

“Items were delayed or not available. We had to pay extra shipping to get things like our wallpaper here on time. Consent was delayed at council. Because the build didn’t start in time, we needed to extend our lease on our rental.” – Qualitative End-User respondent

The time and effort to get quotes from product suppliers was the factor most commonly thought to have got worse for both Businesses and Workers, whilst End-Users were most concerned about *quotes from service suppliers*. Around a third of Workers believed that *quotes from service suppliers* had got better, whilst 40 per cent of Businesses believe it had got worse.

Figure 1: Paperwork, processes and procedures – All groups



Section 2: Products and Materials

Summary

All construction products and materials had become more expensive and were much harder to find, order and receive on time, and this was worst for timber products. These problems were widespread and applied to both New Zealand-made and imported products. The ‘good news’ was that the quality of the products being supplied had changed little, although product substitutions were common and more likely to involve opting for lower-specification alternatives.

Key Qualitative Results

Businesses and **Workers** were experiencing widespread product shortages, price rises and delivery delays. Product amendments generally needed council approval, so product shortages were flowing onto other delays. Product swap-outs were said to be commonplace, with cheaper / less well-performing options often used instead, especially as more expensive options were not acceptable to clients. Alternative options were increasingly being proactively built into project management. Some product price rises could not be passed on to end-clients, resulting in reduced margins – e.g. contractors who paid for their own consumables, such as nails. Inability to reliably access products led to taking on more projects than normal, so there was always something billable to work on – but this increased overall business management complexity, stress and cost.

End-Users were also experiencing these delays, shortages and price rises. A generally reduced range of goods was reported, with impressions that the items left to buy were the more expensive ones – so End-Users had to spend more or got nothing. End-Users sometimes reported that prices had gone up while availability had gone down. Some felt that orders were increasingly being cancelled, necessitating new orders for different products.

Key Quantitative Results

“We’ve had a lack of materials ever since the first big lockdown. We’ve been lacking on getting our full supplies in like we used to. We have to drip feed it as it comes through and space out the days to work around the sites that have materials on site.”

– Qualitative Business respondent

The overall theme of this section was that products and materials had become a major problem in the New Zealand building and construction sector.

Over two-thirds of **Businesses** and **End-Users** reported:

- delays in having preferred products delivered on time
- increased product costs
- reduced ability to order preferred products.

Timber products, especially structural and laminated timber, were the most problematic (in terms of issues with supply, quality and price) for all three main sample groups. End-Users were also highly likely to report problems finding and ordering appliances and whiteware.

Workers were also more likely to report these areas as having got worse rather than better, although to a lesser degree. **Businesses** were more likely to report *increased freight costs* and *higher prices for tools and equipment*. The only measure where ‘good’ or ‘neutral’ responses outnumbered ‘negative’ responses was the *quality of the products being supplied*. These issues were widespread and reported for both New Zealand-made and imported products.

In conclusion, products and materials have become much harder to find, order and receive on time; the problems were magnified by increased costs of products combined with increased freight costs.

Additional Detail

Detailed, annotated tables showing differences amongst sub-samples (where statistically-significant differences exist) for this section can be found in Appendix C, tables 6-18.

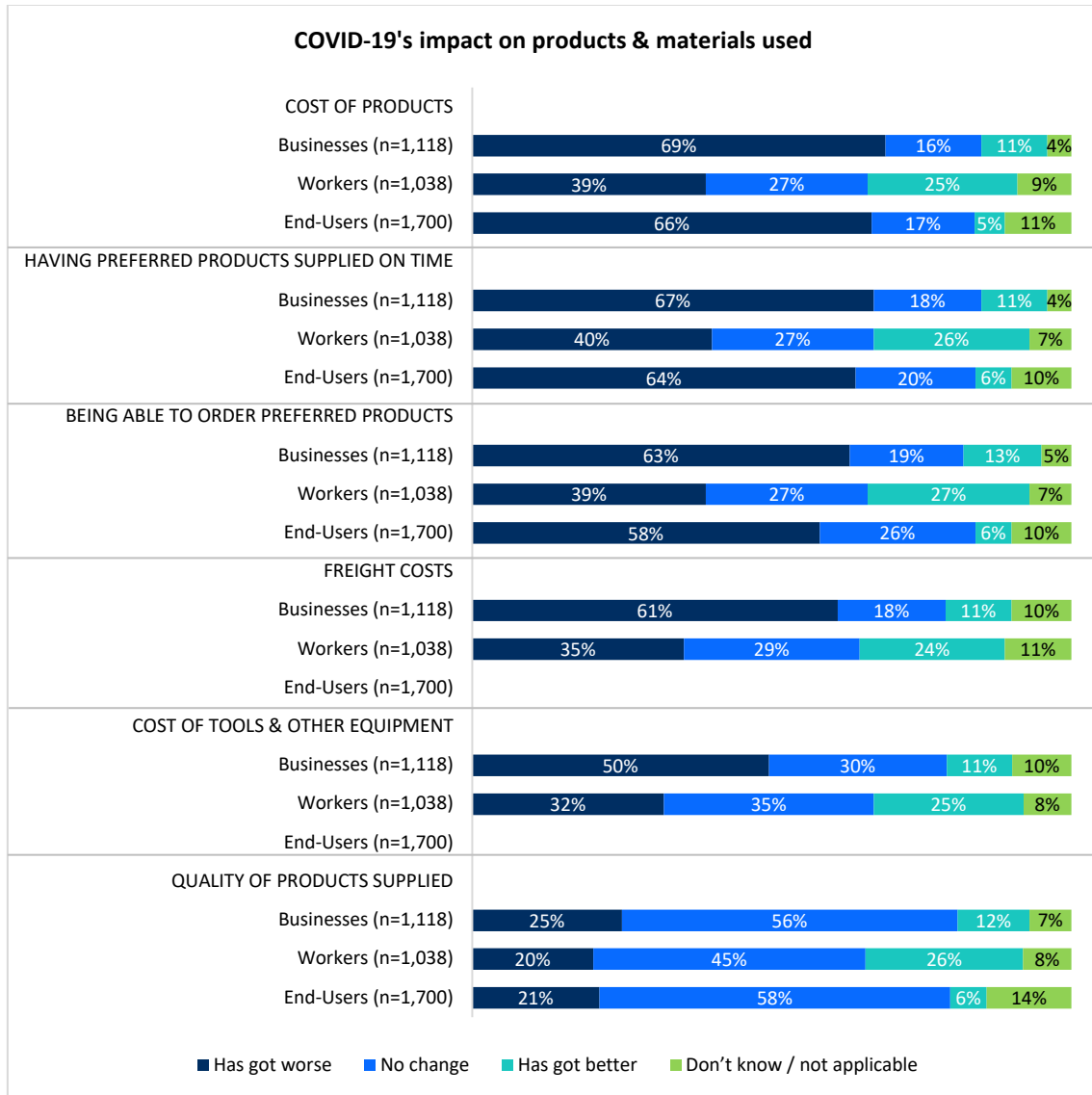
Impact on products and materials used

(Questions QC1/WC1/HC2/HD2/HE2 asked of Businesses, Workers and End-Users)

“Increased workload but delay in project completion due to a shortfall of construction materials that are readily available in NZ which increases costs. If we are sourcing something from overseas, there are months of delays to the project.” – Qualitative Business respondent

When considering the impact the COVID-19 pandemic has had on the products and materials used in the building sector, both Businesses and End-Users were most likely to state that *being able to order preferred products, having preferred products supplied on time* and *cost of products* have got worse. *Freight costs* and *costs of tools and other equipment* were also other areas that Businesses felt have got worse. However, *quality of products supplied* was minimally impacted.

Figure 2: Impact on products and materials used – All groups



Impact on products and materials used – End-Users

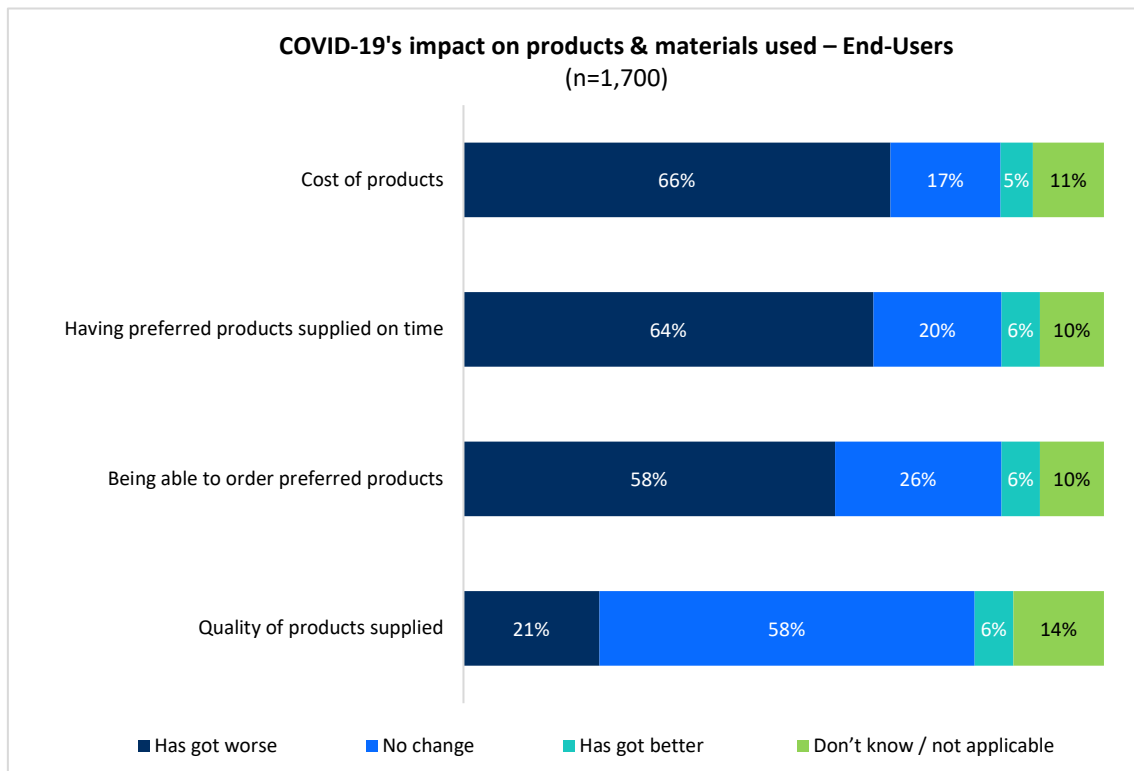
(Question HC2/HD2/HE2 asked of End-Users)

“Our build was put on hold due to COVID, put behind deadline and unable to get some supplies we wanted in time.” – Qualitative End-User respondent

More than half of End-Users believed that *cost of products* (66 per cent), *having preferred products supplied on time* (64 per cent) and *being able to order preferred products* (58 per cent) have got worse since COVID-19.

Significant differences exist between different End-User groups; we recommend readers view Tables 8, 9, 11, 13 and 15 in Appendix C for more details.

Figure 3: Impact on products and materials used – End-Users

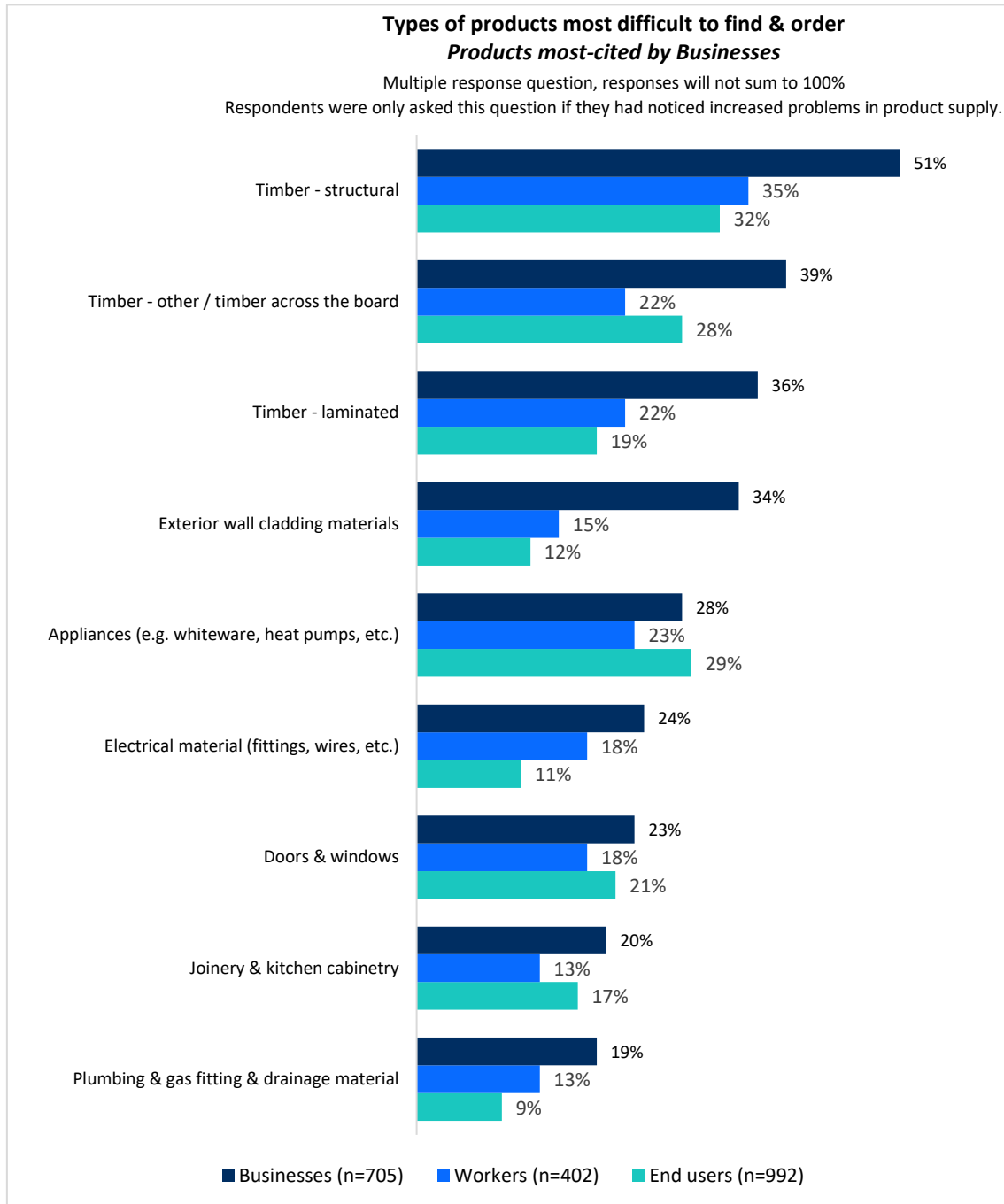


Types of products most difficult to find and order – Main problems

The three main sample groups were fairly similar in their perceptions of the products that were most difficult to find and order.

Businesses, Workers and End-Users alike said that the most problematic product to find was structural timber (cited by 51 per cent, 35 per cent and 32 per cent respectively).

Figure 4: Types of products most difficult to find and order

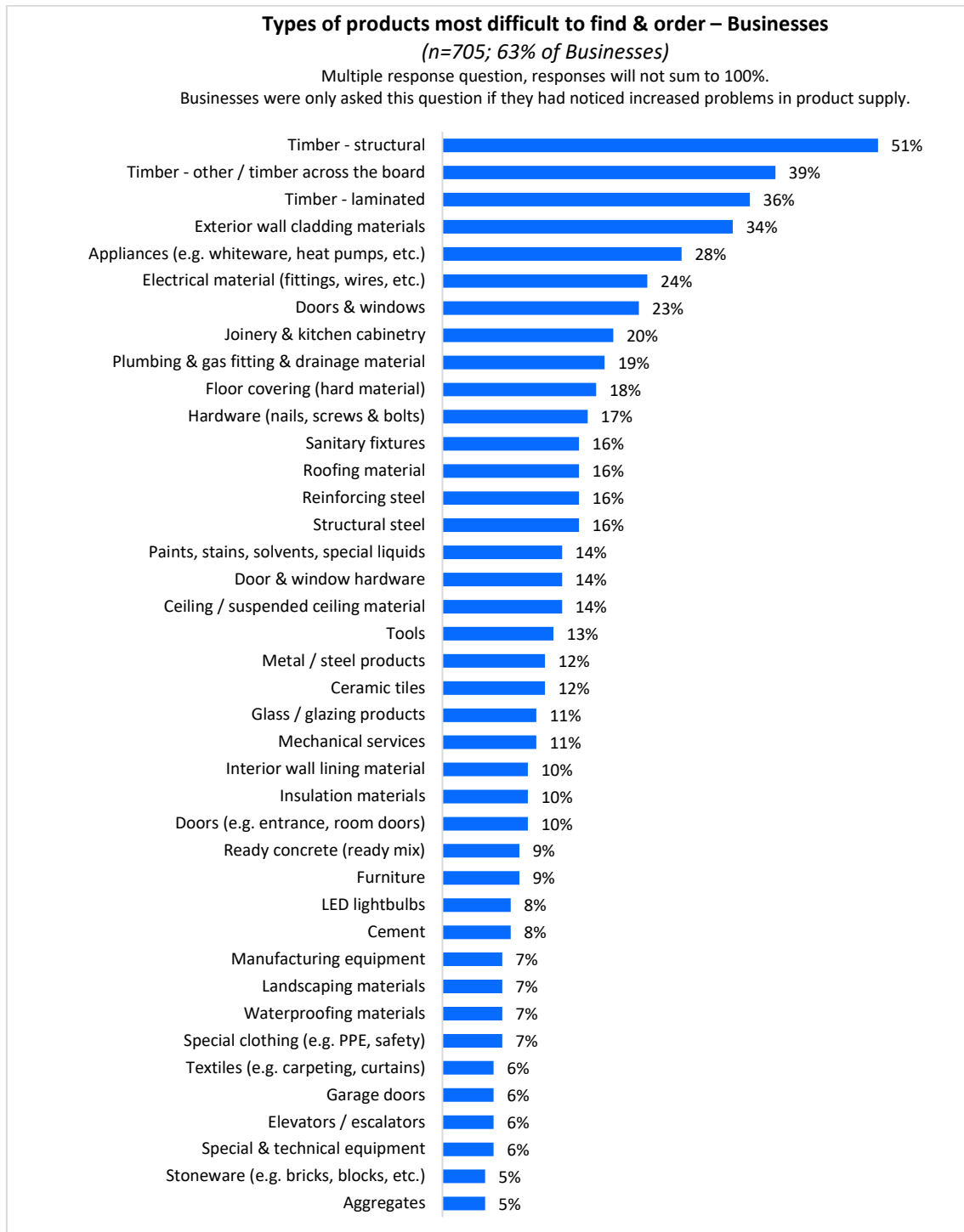


Types of products most difficult to find and order – Businesses

(Question QC2a asked of Businesses reporting products to be difficult to find and order)

For **Businesses**, the types of products currently the most difficult to find and order were numerous, however, *structural timber, timber (across the board), laminated timber* and *exterior wall cladding materials* were most often mentioned.

Figure 5: Types of products most difficult to find and order – Businesses



Note: Responses less than 5% not shown in the graph.

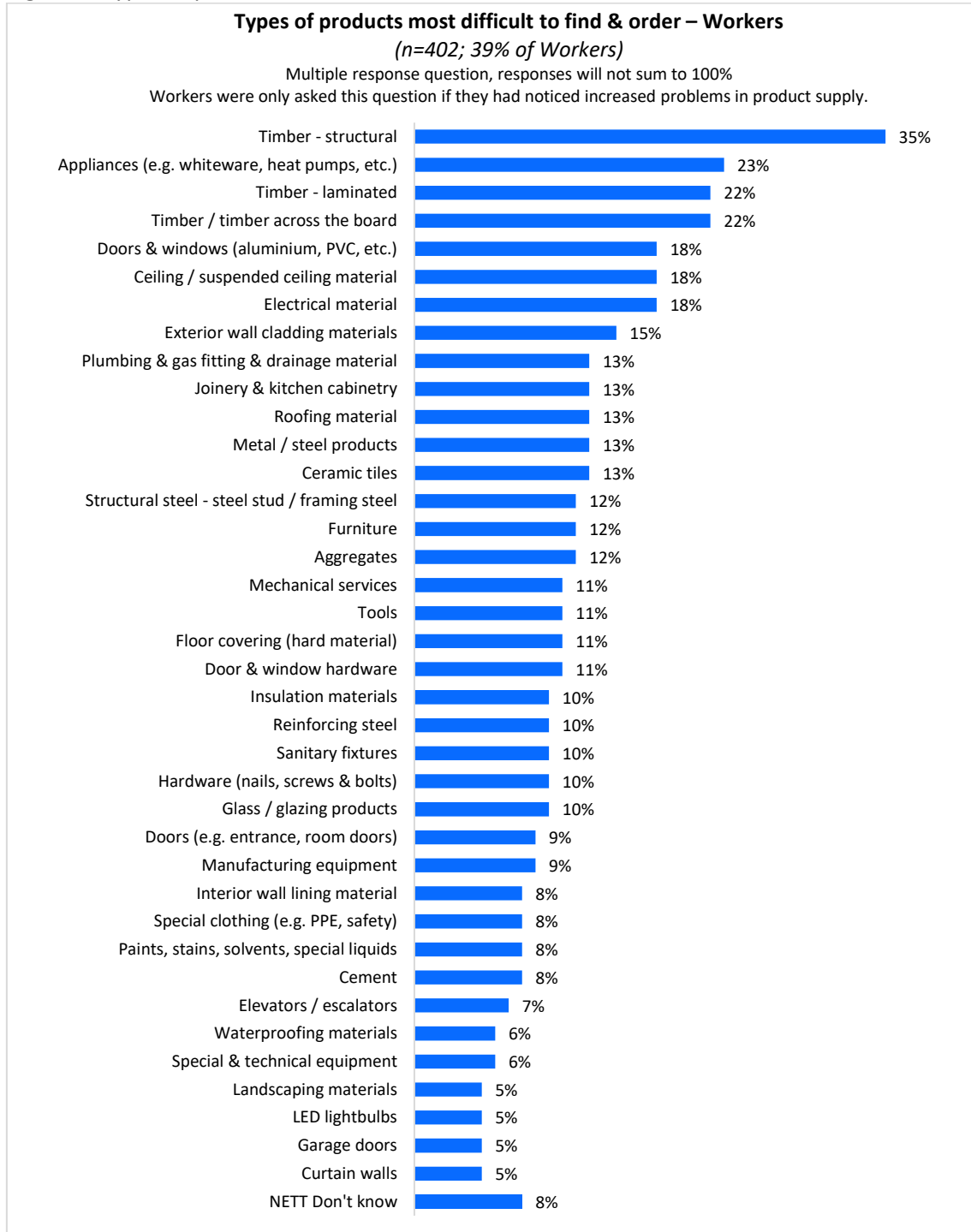
Types of products most difficult to find and order – Workers

(Question WC2a asked of Workers reporting products to be difficult to find and order)

“We have the work, just not the materials to do it.” – Qualitative Worker respondent

Workers most often stated that *structural timber, appliances, laminated timber* and *timber (across the board)* were currently the most difficult to find and order.

Figure 6: Types of products most difficult to find and order – Workers



Note: Responses less than 5% not shown in the graph.

Types of products most difficult to find and order – End-Users

(Question HC3a/HD3a asked of Current / Recent Builders / Renovators / Build / Renovation Delayers reporting products to be difficult to find and order)

“Getting equipment and supplies is harder. We found ourselves travelling out of our way to find the supplies / equipment we needed.” – Qualitative End-User respondent

For End-Users, the top-three types of products most difficult to find and order were *structural timber, appliances* and *timber (across the board)*.

Figure 7: Types of products most difficult to find and order – End-Users



Note: Responses less than 7% not shown in the graph.

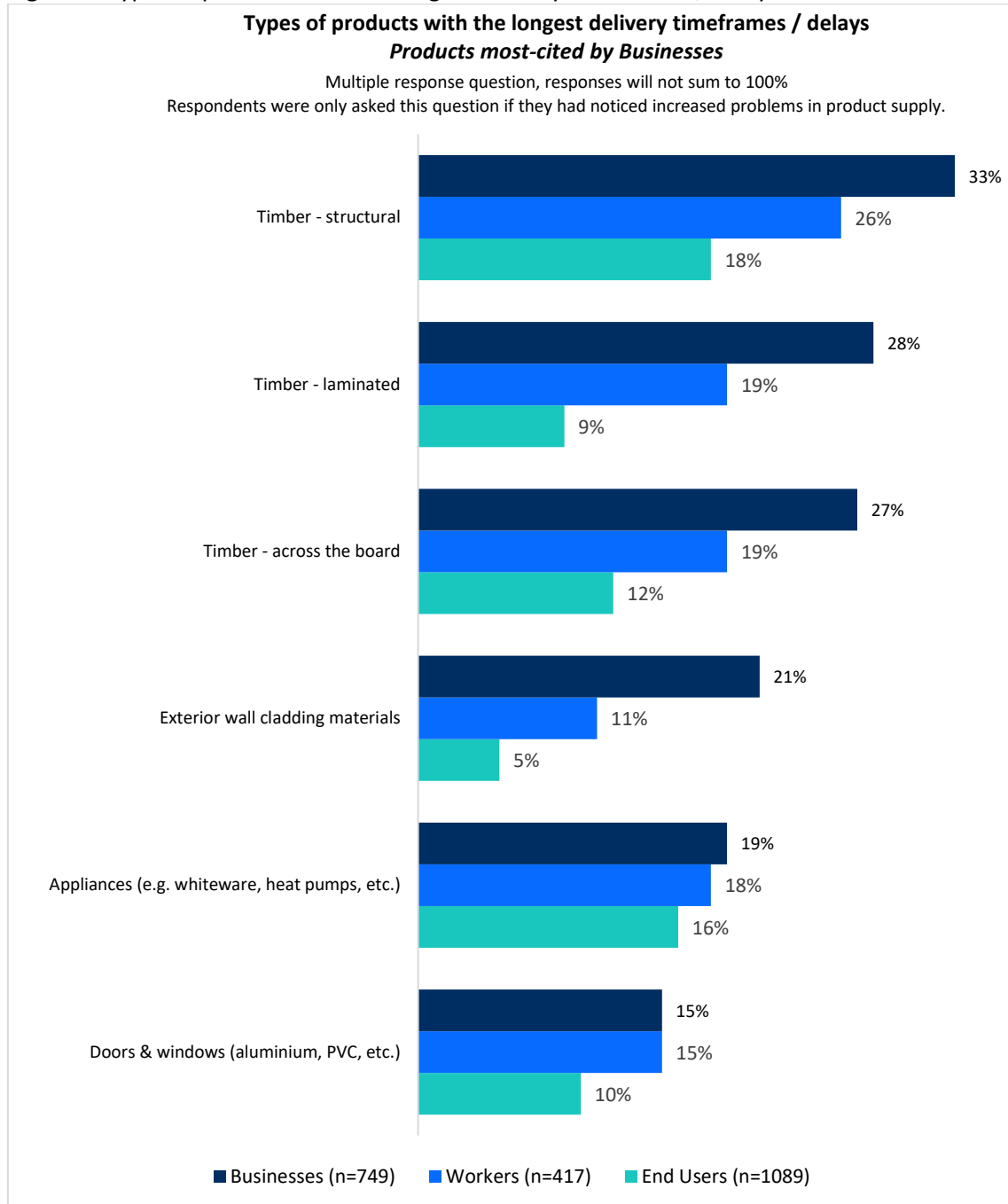
Types of products with the longest delivery timeframes / delays – Main problems

The three main sample groups were fairly similar in their perceptions of the products that had the longest delivery timeframes and delays.

Businesses, Workers and End-Users alike said that the product with the longest delivery times was structural timber (cited by 33 per cent, 26 per cent and 18 per cent respectively).

End-Users were also particularly likely to cite delays in appliance deliveries (cited by 16 per cent).

Figure 8: Types of products with the longest delivery timeframes / delays



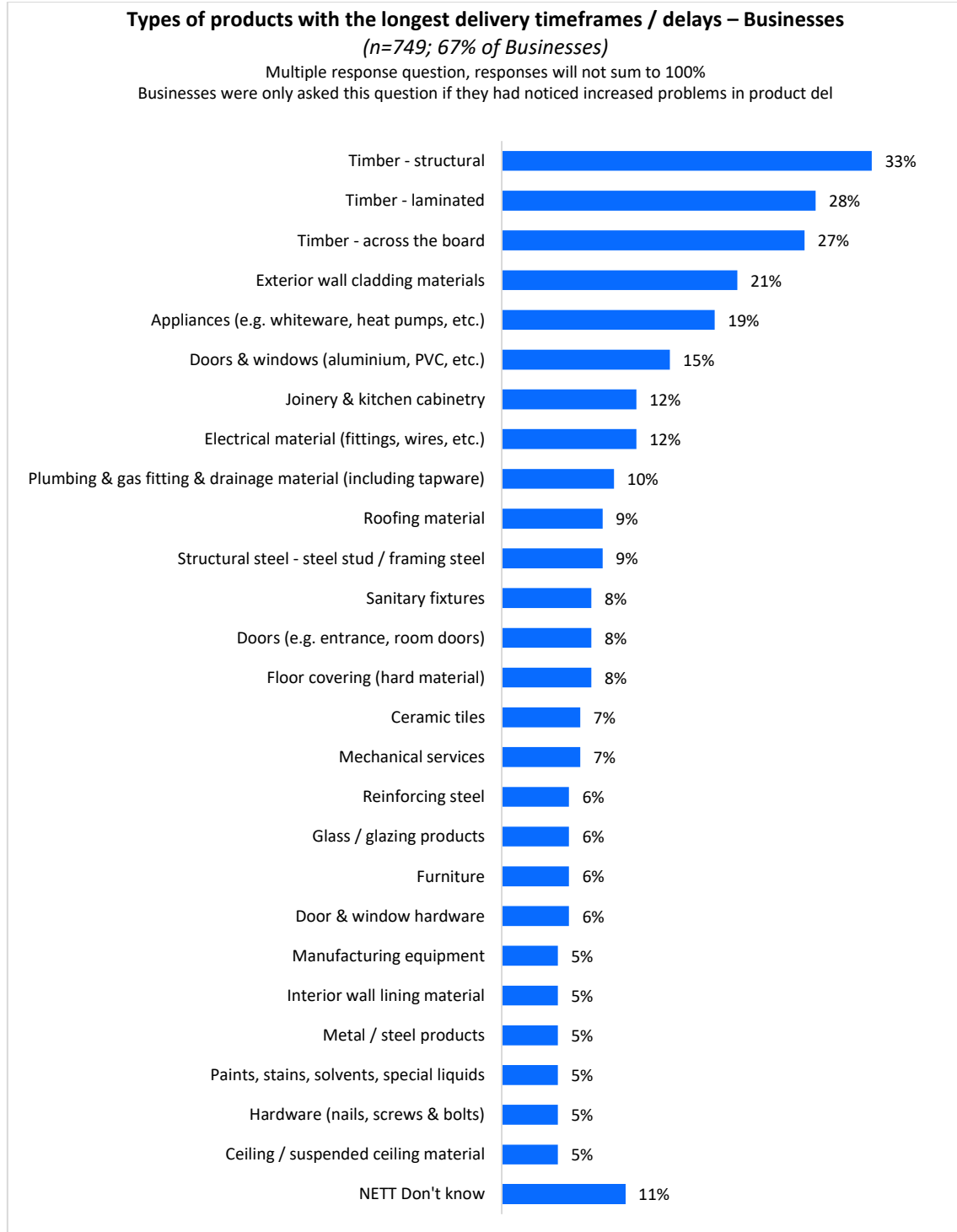
Types of products with the longest delivery timeframes / delays – Businesses

(Question QC2b asked of Businesses reporting product delivery delays)

“We’re looking at 6 months to get some materials” – Qualitative Business respondent

Amongst Businesses reporting product delivery delays, the products with the longest delivery timeframes / delays were *structural timber, laminated timber* and *timber (across the board)*.

Figure 9: Types of products with the longest delivery timeframes / delays – Businesses



Note: Responses less than 5% not shown in the graph.

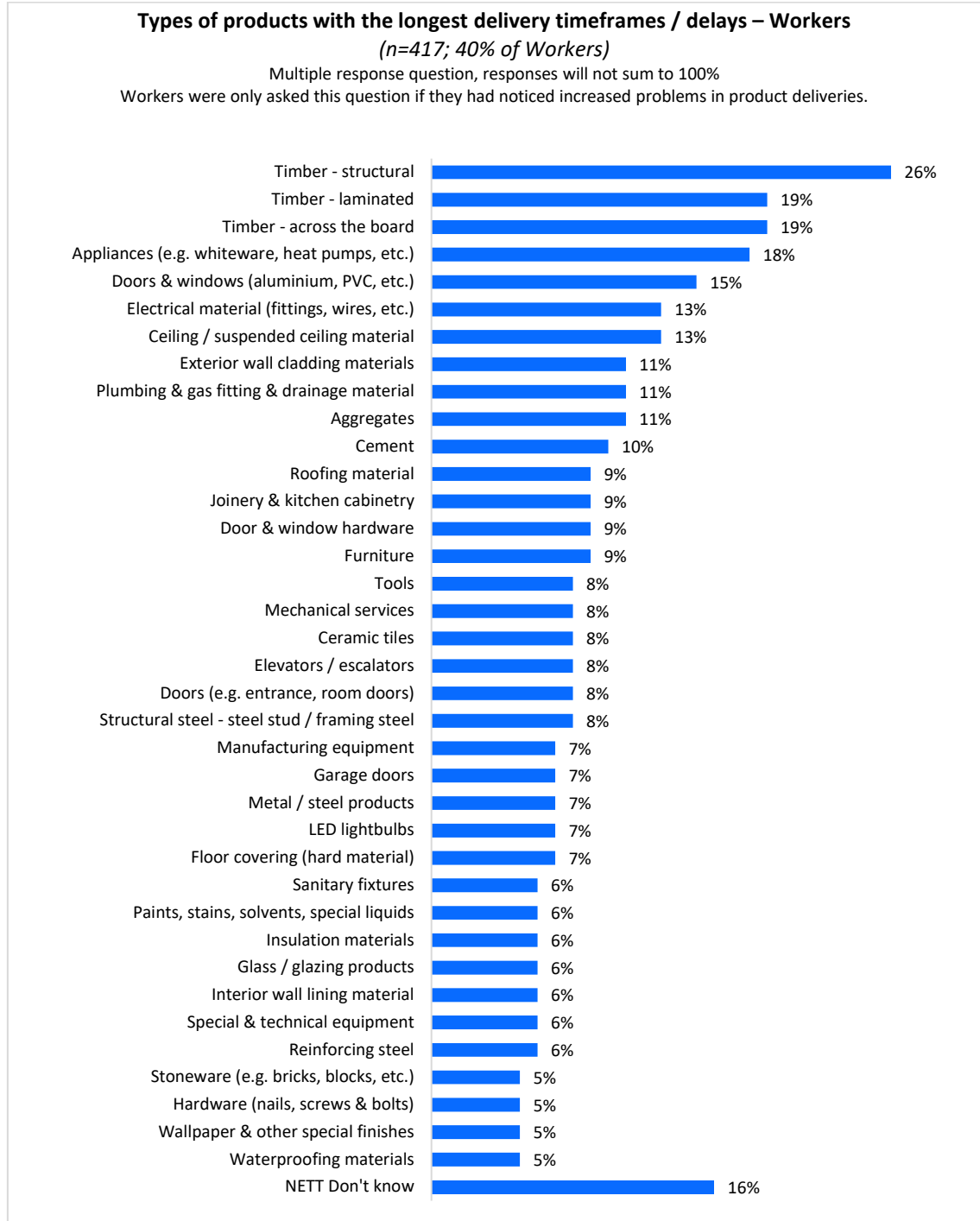
Types of products with the longest delivery timeframe / delays – Workers

(Question WC2b asked of Workers reporting product delivery delays)

“We started a house just before lockdown, we’re still there just because of a lack of materials.” – Qualitative Worker respondent

For Workers reporting product delivery delays, the products with the longest delivery timeframes / delays were *structural and laminated timber, timber (across the board)* and *appliances*.

Figure 10: Types of products with the longest delivery timeframes / delays – Workers



Note: Responses less than 5% not shown in the graph.

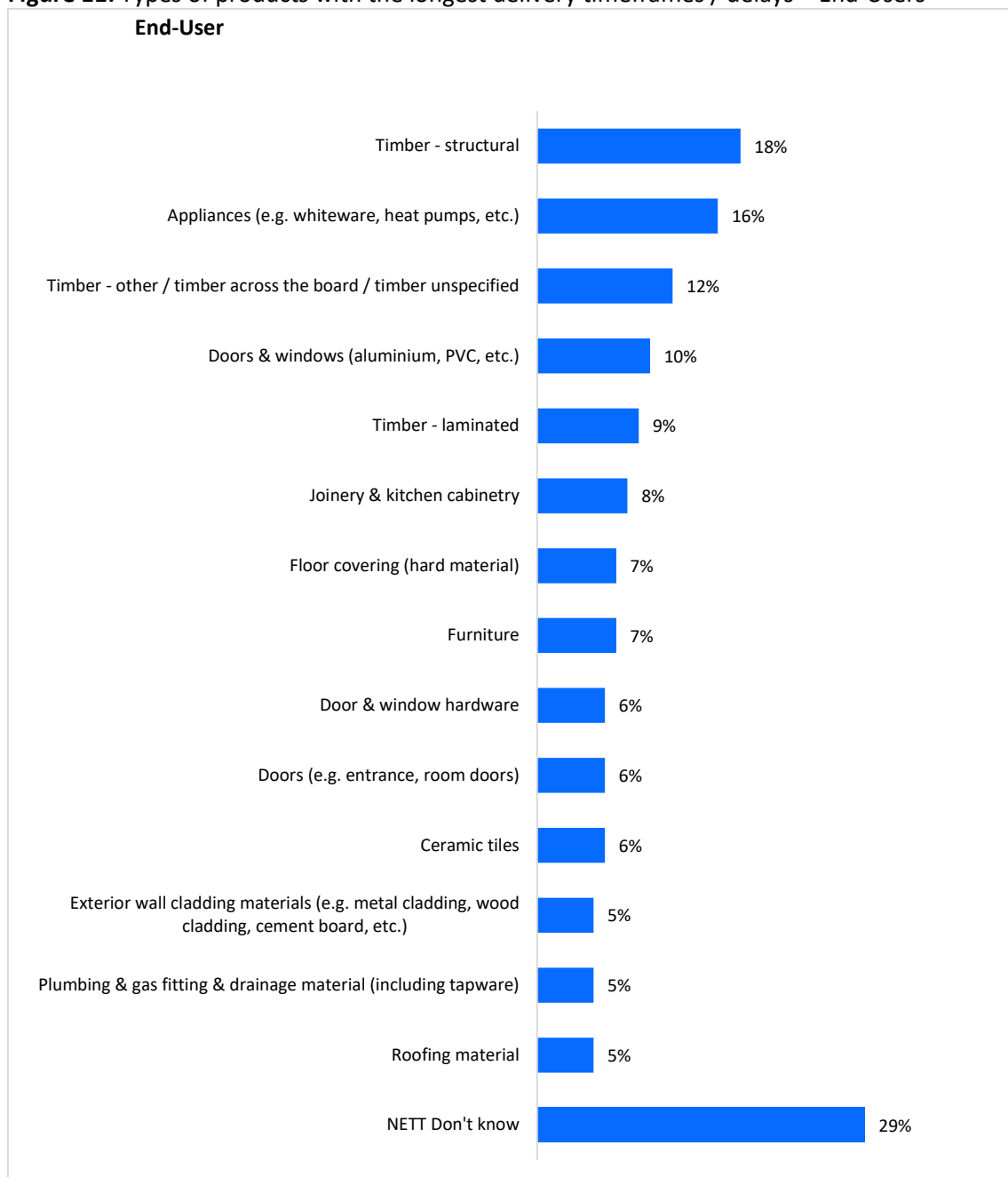
Types of products with the longest delivery timeframes / delays – End-Users

(Question HC3b asked of Current / Recent Builders / Renovators and Build / Renovation Delayers reporting product delivery delays)

“Getting equipment and supplies is harder. We found ourselves travelling out of our way to find the supplies / equipment we needed.” – Qualitative End-User respondent

For End-Users reporting product delivery delays, the products with the longest delivery timeframes / delays were *timber (structural)* and *appliances*.

Figure 11: Types of products with the longest delivery timeframes / delays – End-Users



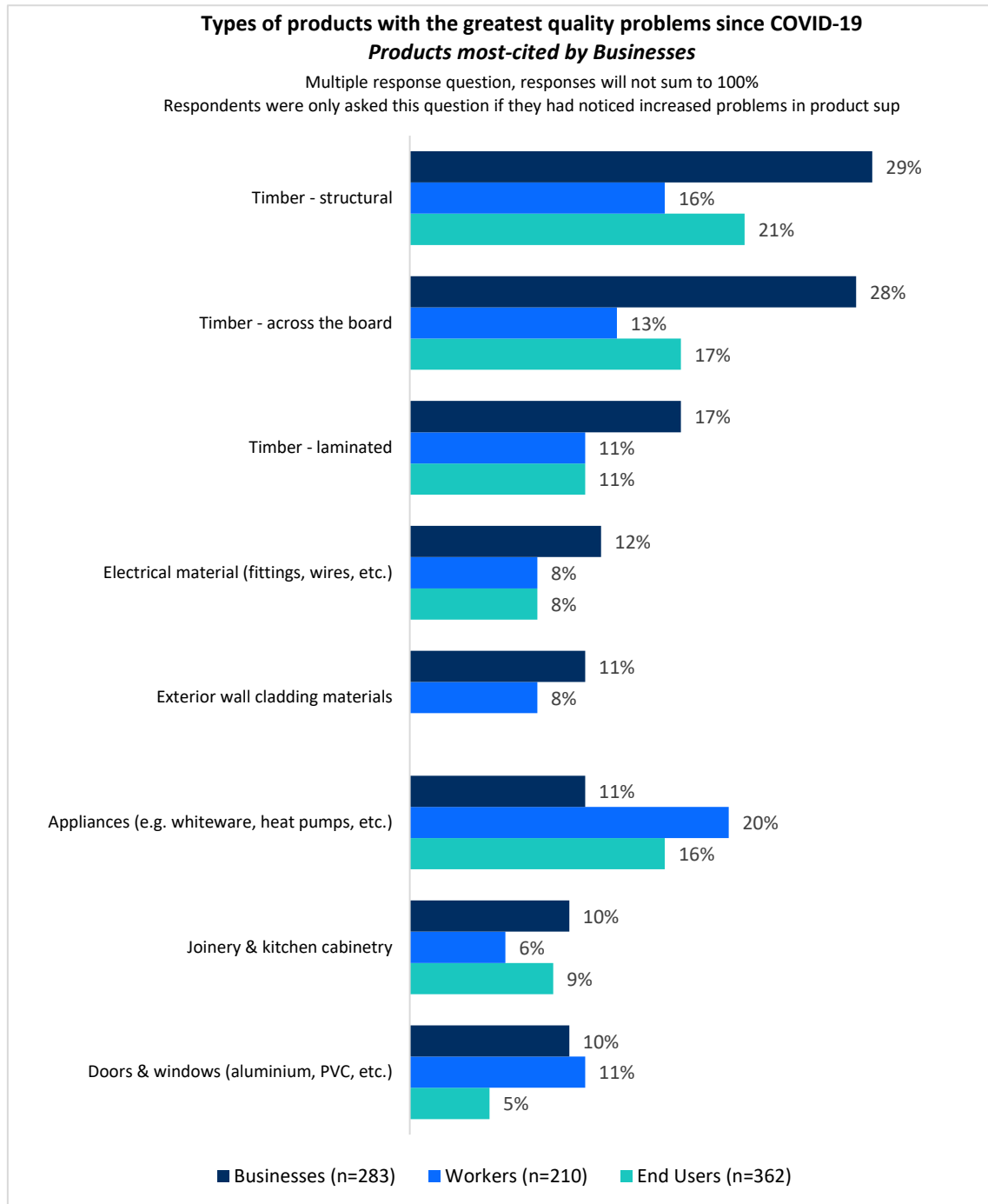
Note: Responses less than 5% not shown in the graph.

Types of products with the greatest quality problems since COVID-19 – Main problems

Businesses were the most likely to say that structural timber had had quality problems (29 per cent) followed closely by general timber ‘across the board’ (28 per cent).

Workers felt the same way about timber quality. Both **Workers** and **End-Users** were more likely than **Businesses** to cite quality problems with appliance quality – 20 per cent of **Workers** and 16 per cent of **End-Users** who had noticed quality changes saying that appliance quality had worsened.

Figure 12: Types of products with the greatest quality problems



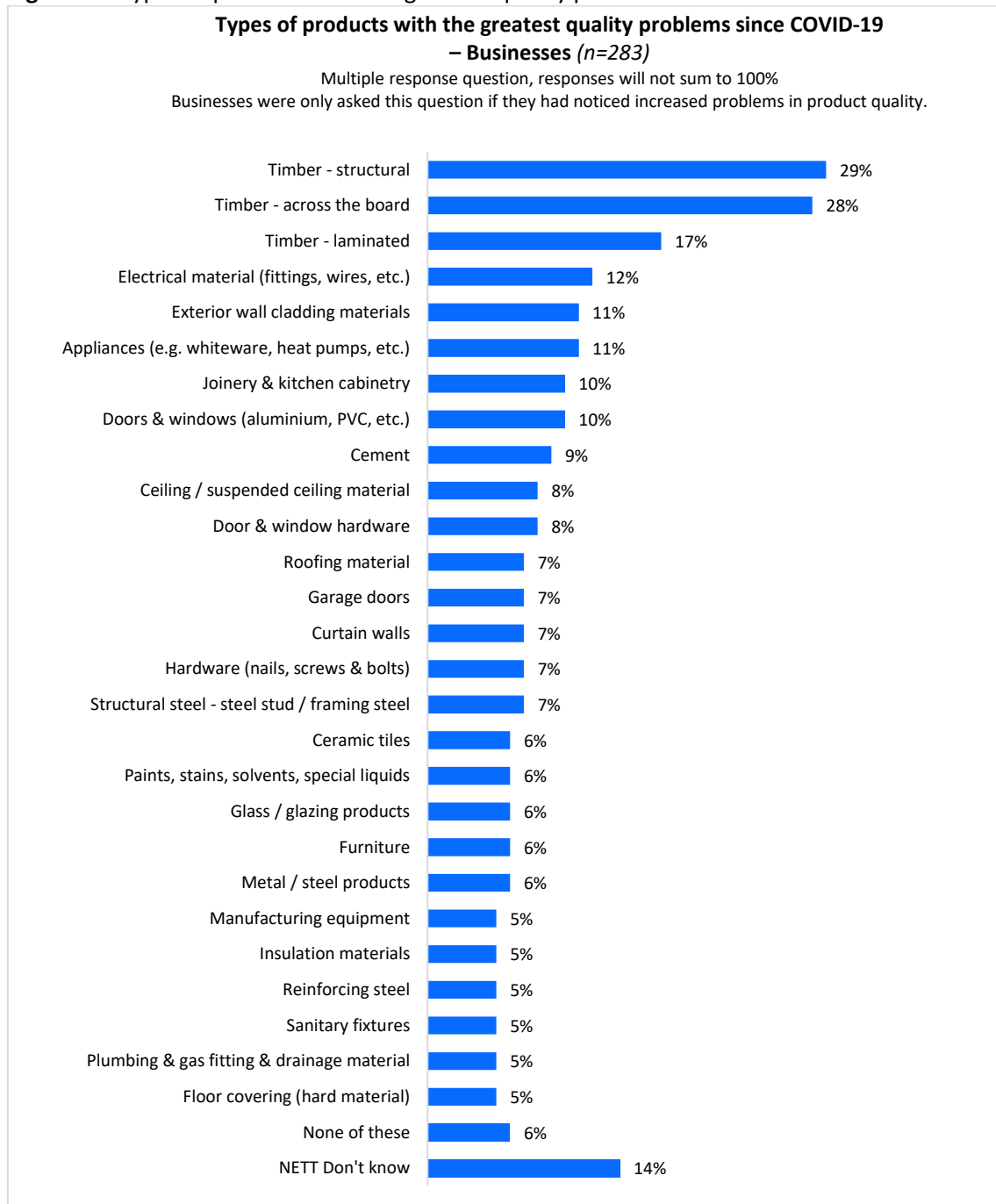
Types of products with the greatest quality problems since COVID-19 – Businesses

(Question QC2c asked of Businesses citing increased product quality problems)

“Sometimes you just have to take the warped timber that’s been sitting in the rain because there’s nothing else available” – Qualitative Business respondent

Businesses citing increased product quality problems considered *structural timber*, *timber (across the board)* and *laminated timber* as the products with the greatest quality problems since the COVID-19 pandemic.

Figure 13: Types of products with the greatest quality problems – Businesses



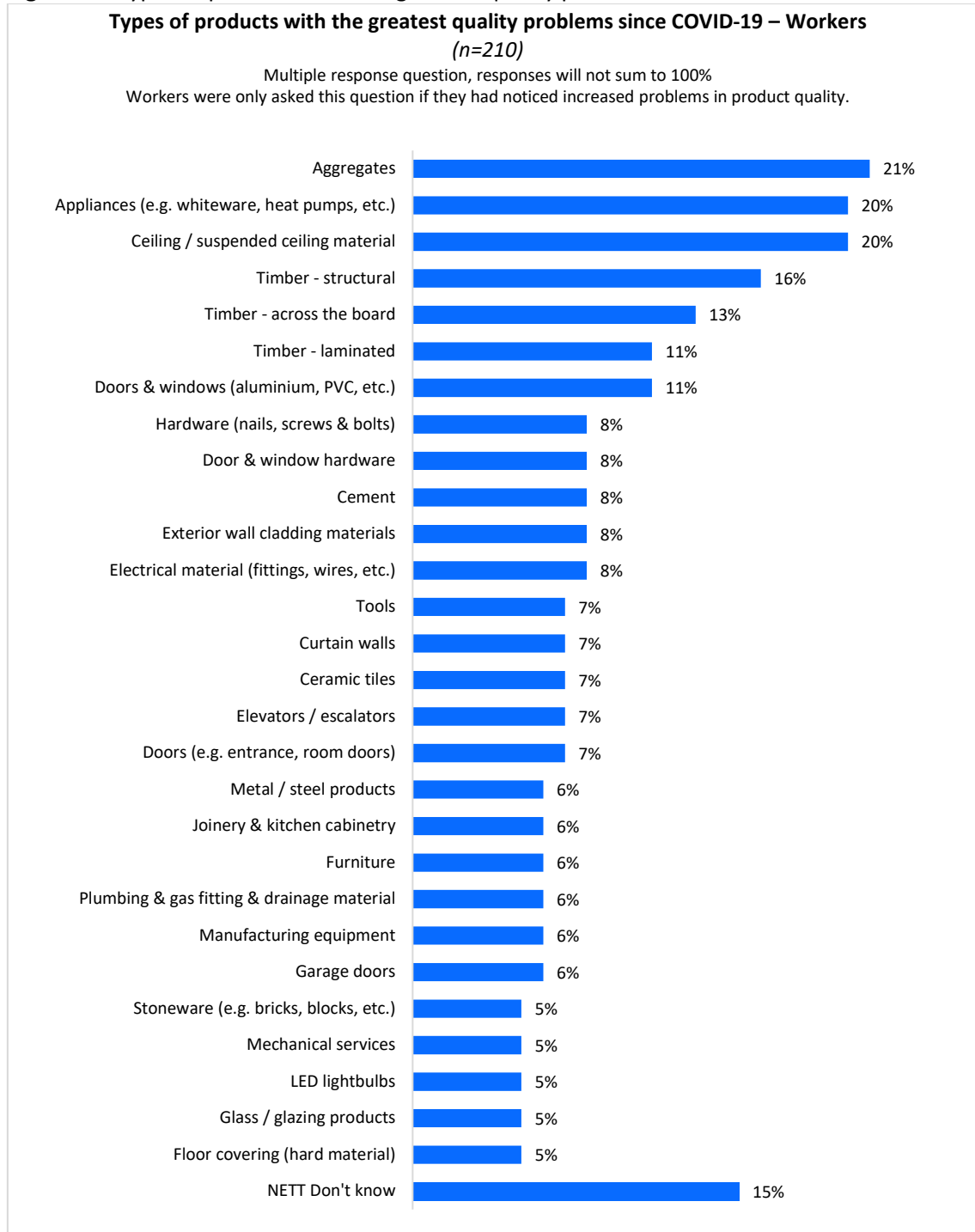
Note: Responses less than 5% not shown in the graph.

Types of products with the greatest quality problems since COVID-19 – Workers

(Question WC2c asked of Workers citing increased product quality problems)

Workers citing increased product quality problems were most likely to claim that *aggregates*, *appliances* and *ceiling / suspended ceiling material* had experienced more quality problems since the COVID-19 pandemic.

Figure 14: Types of products with the greatest quality problems – Workers



Note: Responses less than 5% not shown in the graph.

Types of products with the greatest quality problems since COVID-19 – End-Users

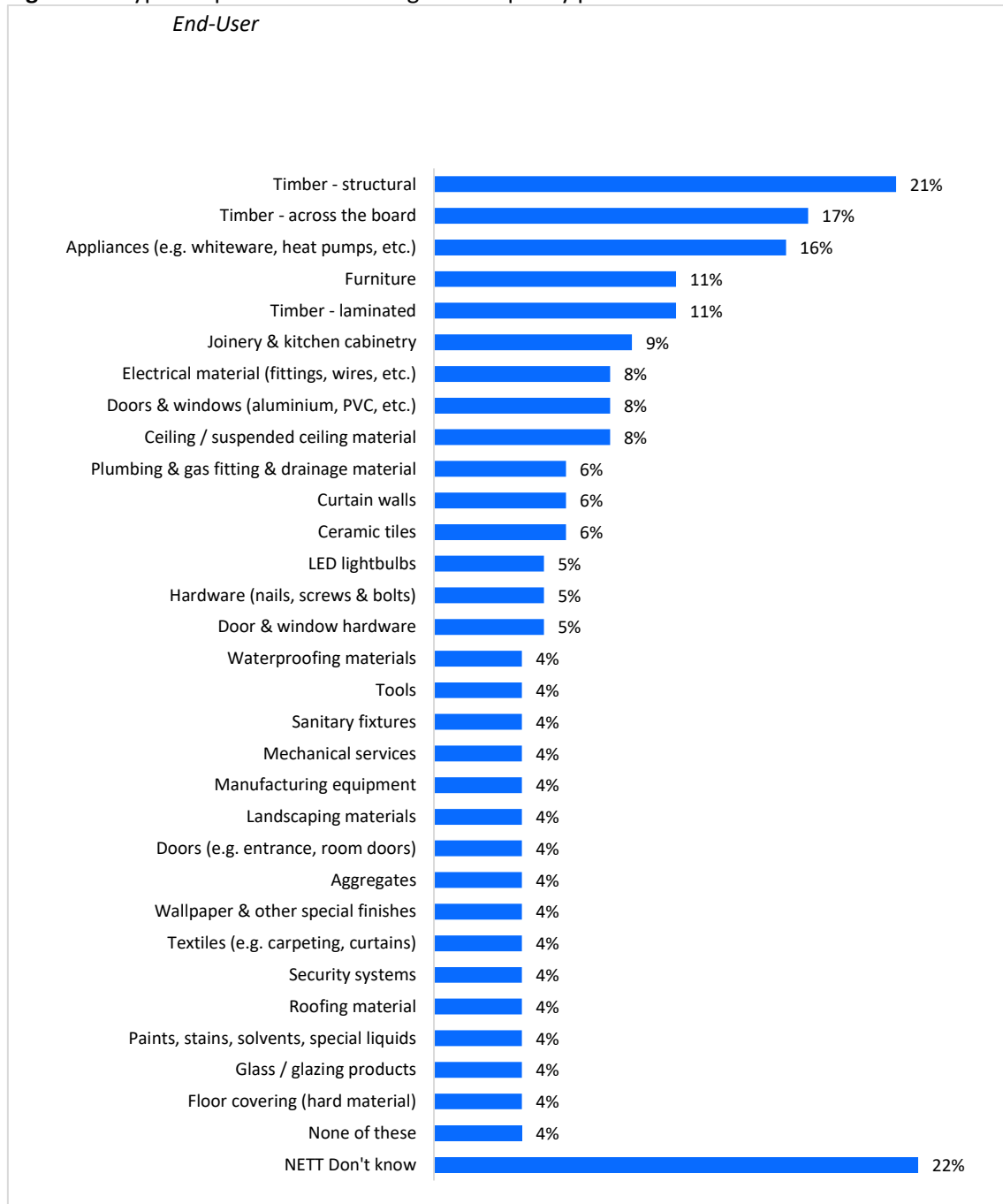
(Question HC3c/HD3c asked of Current / Recent Builders / Renovators and Build / Renovation Delayers citing increased product quality problems)

“We couldn’t get the tiles we wanted so had to settle for ones which weren’t as good.”

Qualitative End-User respondent

End-Users, like Businesses, also felt that the products with the greatest quality problems since the COVID-19 pandemic were *structural timber*, *timber (across the board)* and *appliances*.

Figure 15: Types of products with the greatest quality problems – End-Users

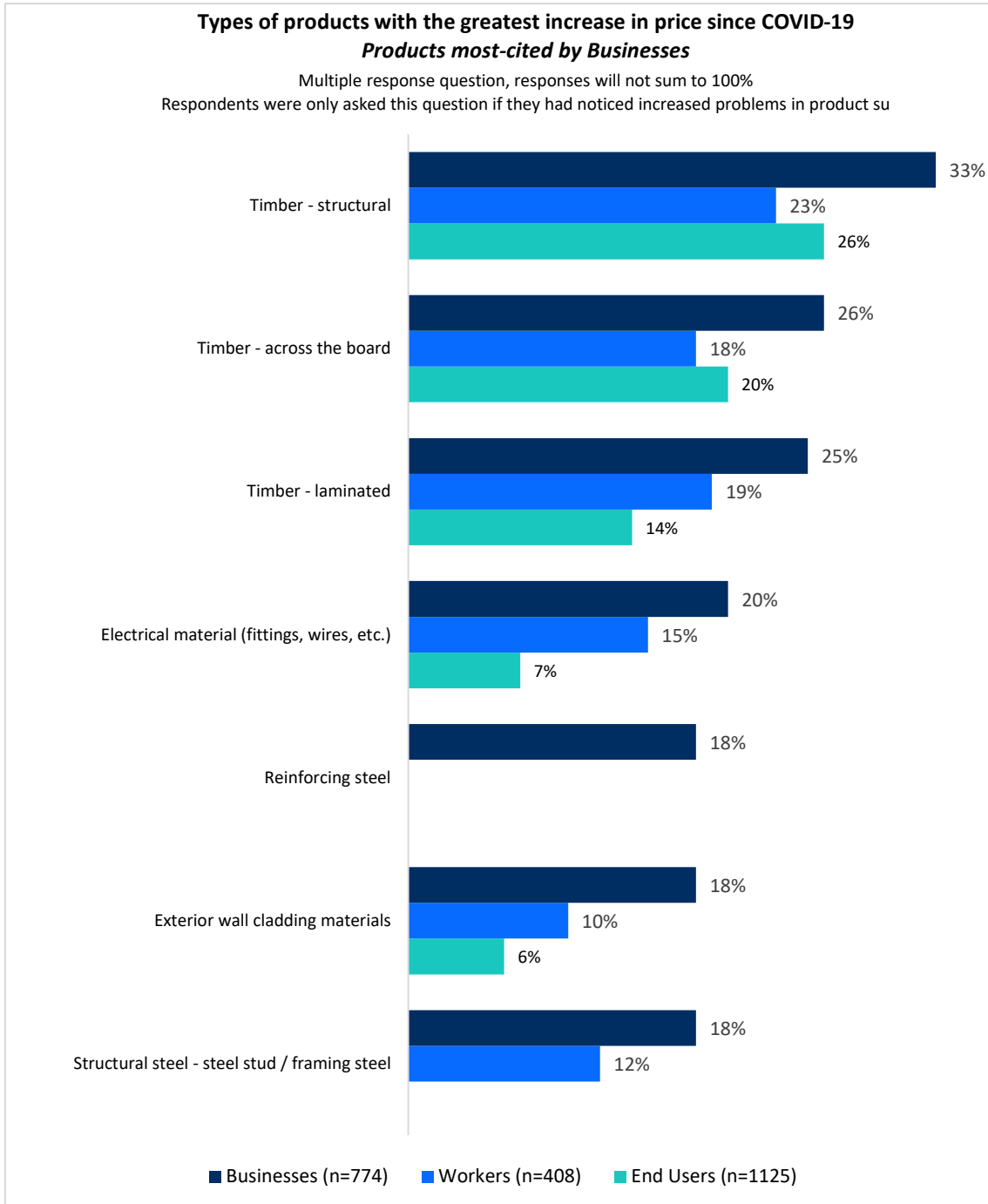


Note: Responses less than 4% not shown in the graph.

Types of products with the greatest increase in price since COVID-19 – Main problems

Timber, of all types, topped the list of products most likely to have risen in price, and for all three of the key sample groups.

Figure 16: Types of products with the greatest increase in price



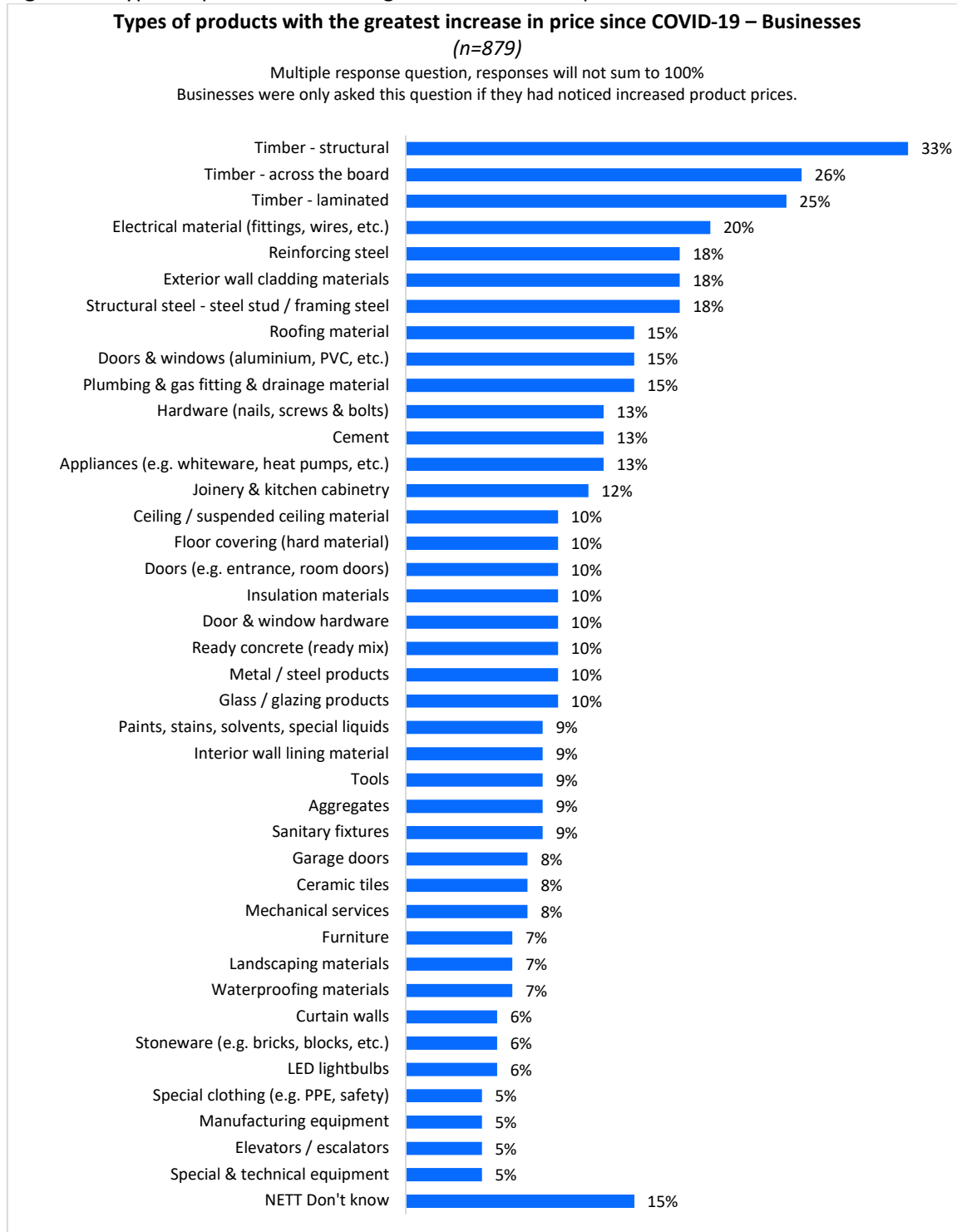
Types of products with the greatest increase in price since COVID-19 – Businesses

(Question QC2d asked of Businesses noting product price increases)

“Everything’s going up.” – Qualitative Business respondent

When asked what products increased the most in price since the COVID-19 pandemic, Businesses were most likely to cite *structural timber*, *timber (across the board)* and *laminated timber*.

Figure 17: Types of products with the greatest increase in price – Businesses



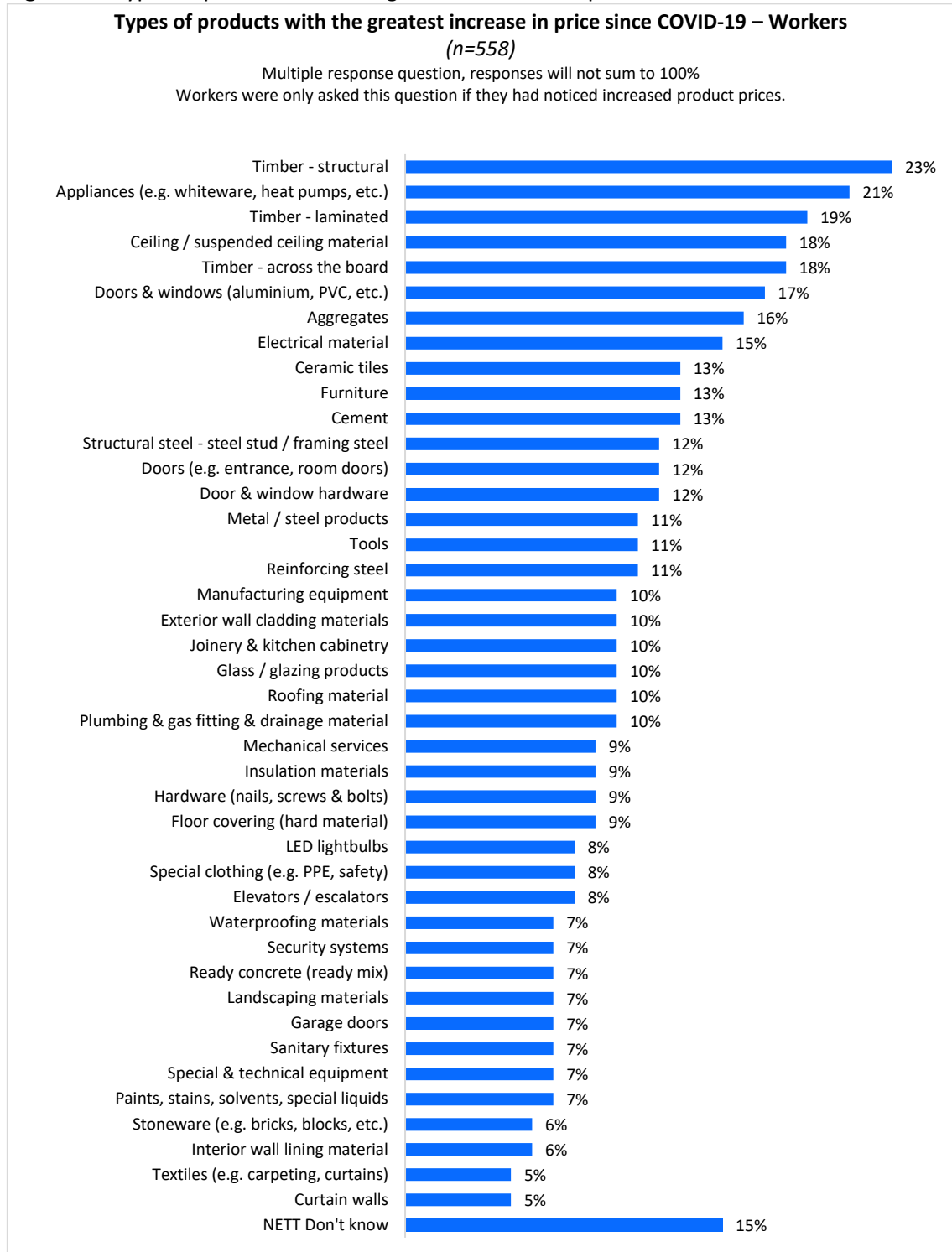
Note: Responses less than 5% not shown in the graph.

Types of products with the greatest increase in price since COVID-19 – Workers

(Question WC2d asked of Workers citing increased product prices)

For Workers citing increased product prices, *structural timber, appliances, laminated timber, ceiling / suspended ceiling material* and *timber (across the board)* were the types of products most likely to have increased in price since the COVID-19 pandemic.

Figure 18: Types of products with the greatest increase in price – Workers



Note: Responses less than 5% not shown in the graph.

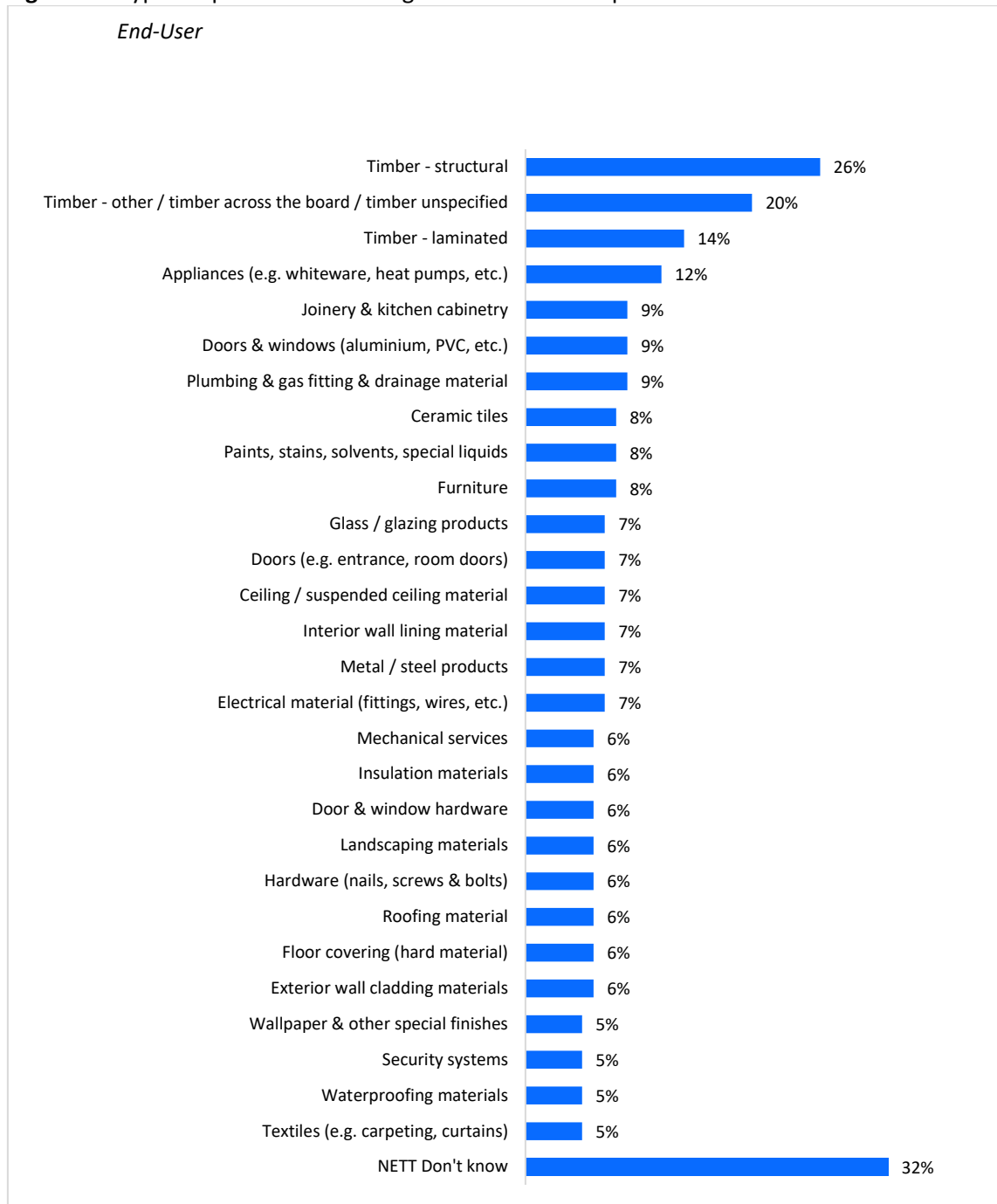
Types of products with the greatest increase in price since COVID-19 – End-Users

(Question HC3D/HD3D asked of Current / Recent Builders / Renovators and Build / Renovation Delayers citing increased product prices)

“Some of the things we would want to do would be expensive – recladding, heat pumps... we would need to get a top-up from the bank, the mortgage broker said this wasn't a good time to be raising that.” – Qualitative End-User respondent

For End-Users citing increased product prices, *structural timber, timber (across the board), laminated timber* and *appliances* were the types of products with the greatest increase in price since the COVID-19 pandemic.

Figure 19: Types of products with the greatest increase in price – End-Users



Note: Responses less than 5% not shown in graph.

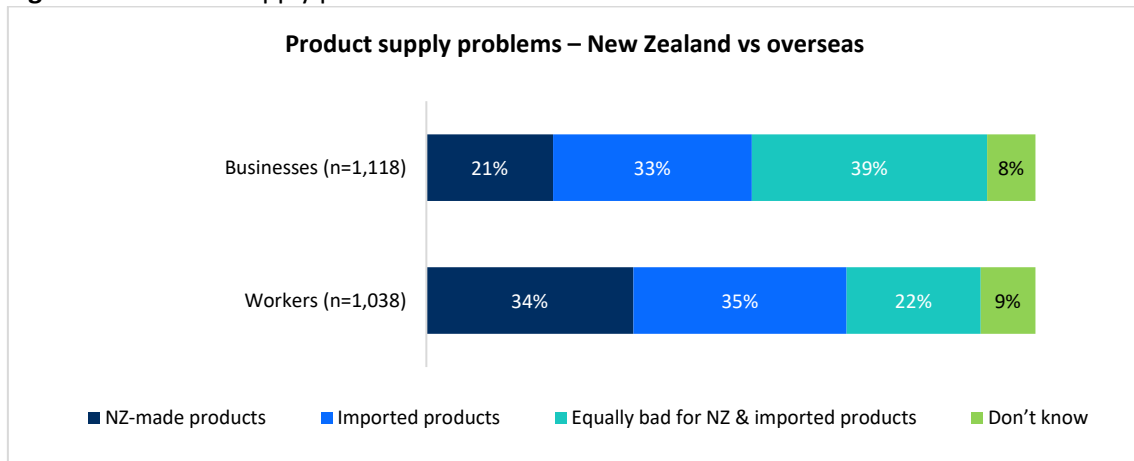
Product supply problems – New Zealand vs overseas

(Question QCD/WCD asked of Businesses and Workers)

More than a third (39 per cent) of Businesses felt that product supply issues were *equally bad for New Zealand and imported products*, whilst a third (33 per cent) stated it was mainly a problem for *imported products*.

A third (35 per cent) of Workers believed the product supply problems were for *imported products*, whilst another third (34 per cent) stated they mainly applied to *New Zealand-made products*.

Figure 20: Product supply problem – New Zealand vs overseas – Businesses and Workers



As stated by one respondent:

“A lot of the laminated products come from overseas, and that’s taking much longer than it used to” – Qualitative Business respondent

Section 3: Changes in Building / Renovation Design Specifications

Summary

Home offices, multi-generational houses, and more flexible residential design options became more commonly specified as a result of the COVID-19 pandemic. Design specifications for less environmental impact; and the use of better heating and ventilation systems, insulation, and more energy-efficient appliances, systems, and designs were also reported.

Key Qualitative Results

Businesses and **Workers** were reporting some changes in building specifications as a result of workplace and lifestyle changes arising from the Level 4 Lockdown period. For example, commercial office spaces were said to be shrinking, which meant reduced performance needs e.g., air conditioning, extra staff facilities, etc., and more hot-desking; some businesses were changing building specifications to reflect changing times e.g., fewer staff carparks and more bicycle facilities. An increased spend on public sector projects was also noted. Some building designs were reportedly being 'lockdown proofed' to require fewer on-site construction staff. Lastly, house price rises were said to be leading to more multi-generational home designs, with a different product mix (e.g., more appliances) per build.

Some **End-Users** were re-evaluating their initial product specifications in light of their Alert Level 4 lockdown experiences, with some opting for higher-specified items (e.g., insulation and solar power) and others changing due to the extra time they were able to spend making decisions while they faced delays, and/or because of the products initially requested becoming unavailable.

More time at home and different usage was also said to be leading to change. Some noted how spending more time at home made them better notice how well it worked (or did not). Consent delays also gave time to reflect and change plans. Repurposing rooms for home office space was often reported, along with more family / children's spaces.

Key Quantitative Survey Results

Business respondents of all sizes indicated that all types of work had increased, especially residential new-builds and renovations, and infrastructure maintenance / expansion. Workers were more likely than Businesses to report increases in civil and commercial projects.

Since the COVID-19 pandemic changed how people live and work, there has been increasing anecdotal evidence of changes in building specifications and use occurring as a result. This survey has quantified these changes. In relation to the increased trend to work from home:

- Where specifications for offices and commercial space are changing, these were becoming smaller rather than larger.
- Home offices and more flexible residential design options were becoming more commonly specified.

The increase in residential house prices appears to have contributed to the survey findings that:

- There was a large increase in *homes designed for multi-generational users / extended families*, which was also reported in the qualitative research report findings as a result of fewer people being able to buy their first home.
- *Multi-level buildings* were becoming more common (although these were more expensive per m², this may reflect shrinking urban property sizes and increasing numbers of townhouses). It should be noted this pattern has been started before Covid-19
- Around 40 per cent of Businesses and Workers reported an increased interest in *cheaper design / product specifications* and *smaller home designs*.

Conversely, the current housing market has rewarded existing homeowners with low mortgage interest rates and increasing home values. Hence, around a third of Businesses and Workers reported an increase in larger houses and an increase in *more expensive design / product specifications*, plus a big increase in residential building in general. The result was that both cheaper and more expensive designs and specifications were becoming more common.

The hypothesis that as COVID-19 led to people spending more time at home, they would have an increased interest in different design and product features, was supported in this survey:

- Businesses and Workers reported increased interest in all aspects, especially:
 - better heating and/or ventilation systems (48 and 53 per cent of Businesses and Workers respectively)
 - more energy-efficient appliances, systems and designs (50 and 53 per cent of Businesses and Workers respectively)
 - better insulation (50 per cent each)
 - less environmental impact (42 and 46 per cent of Businesses and Workers respectively).

End-Users were also most likely to cite these areas as changes they had made since the COVID-19 pandemic.

- Those who were planning to build and those who had delayed their building project, were more likely to cite changes in general and to have switched to designs that were cheaper, smaller and at single-level.

End-Users building or renovating **investment properties** were more likely to:

- opt for cheaper designs / products (21 per cent cf., 14 per cent of non-investors)
- change from a multi-story to single-story design (13 per cent cf., 4 per cent of non-investors)
- change to a design that better suits multi-generational living arrangements (17 per cent cf., 9 per cent of non-investors).

Additional Detail

Detailed, annotated tables showing differences amongst sub-samples (where statistically-significant differences exist) for this section can be found in Appendix C, tables 19-23.

Changes in design preferences / project types since the COVID-19 pandemic – Businesses and Workers

(Question QC3/WC3 asked of Businesses and Workers)

Overall, Workers were likely to report slightly higher levels of changes in design preferences than Businesses. *Smaller houses, design / specifications for less environmental impact and using better heating and/or ventilation systems* were most commonly mentioned by both Businesses and Workers. Additionally, seeking *more energy-efficient systems, designs and appliances* was mentioned as one of the most common design elements with higher interest since the COVID-19 pandemic.

Figure 21: Changes in design preferences / project types – Businesses and Workers (I)

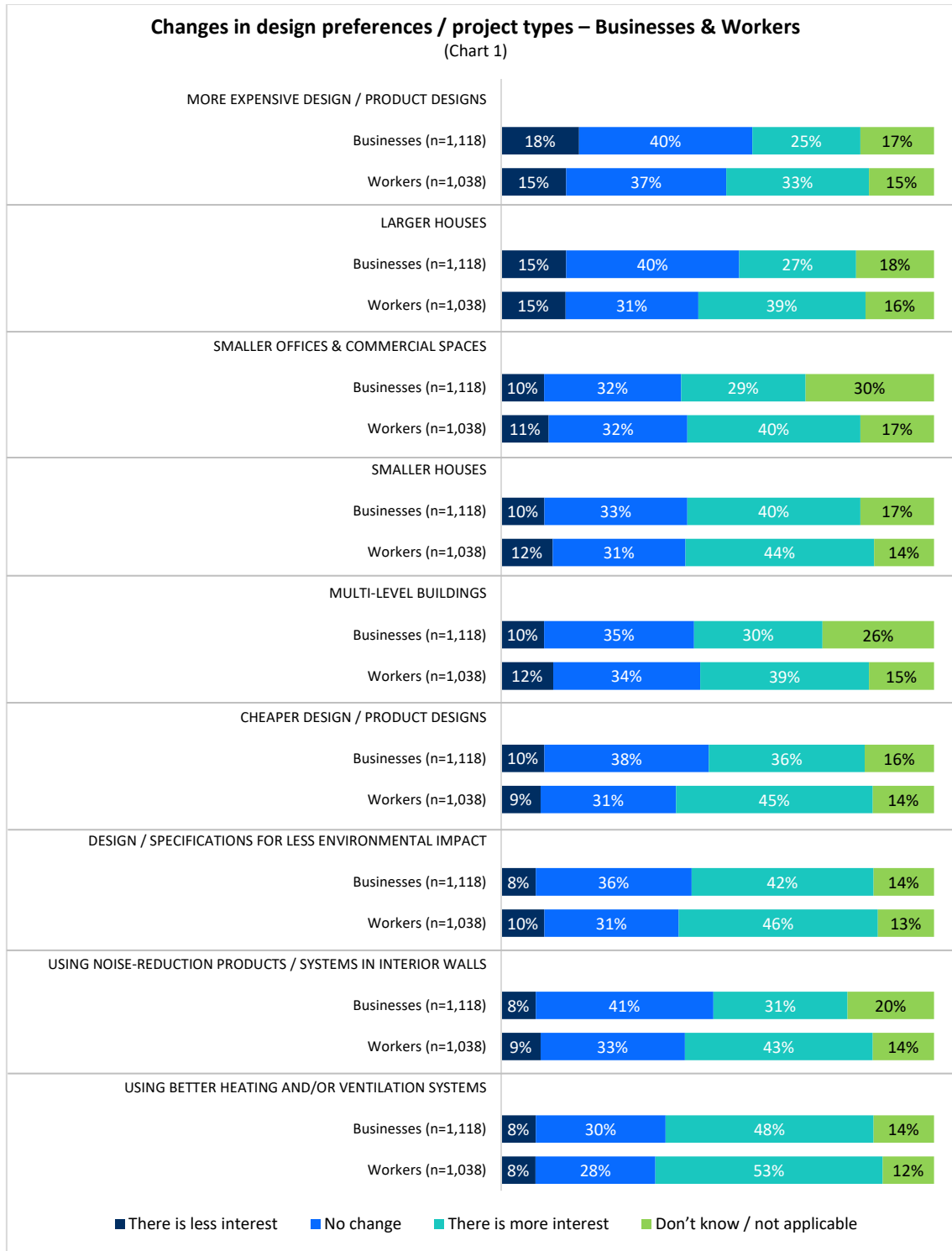
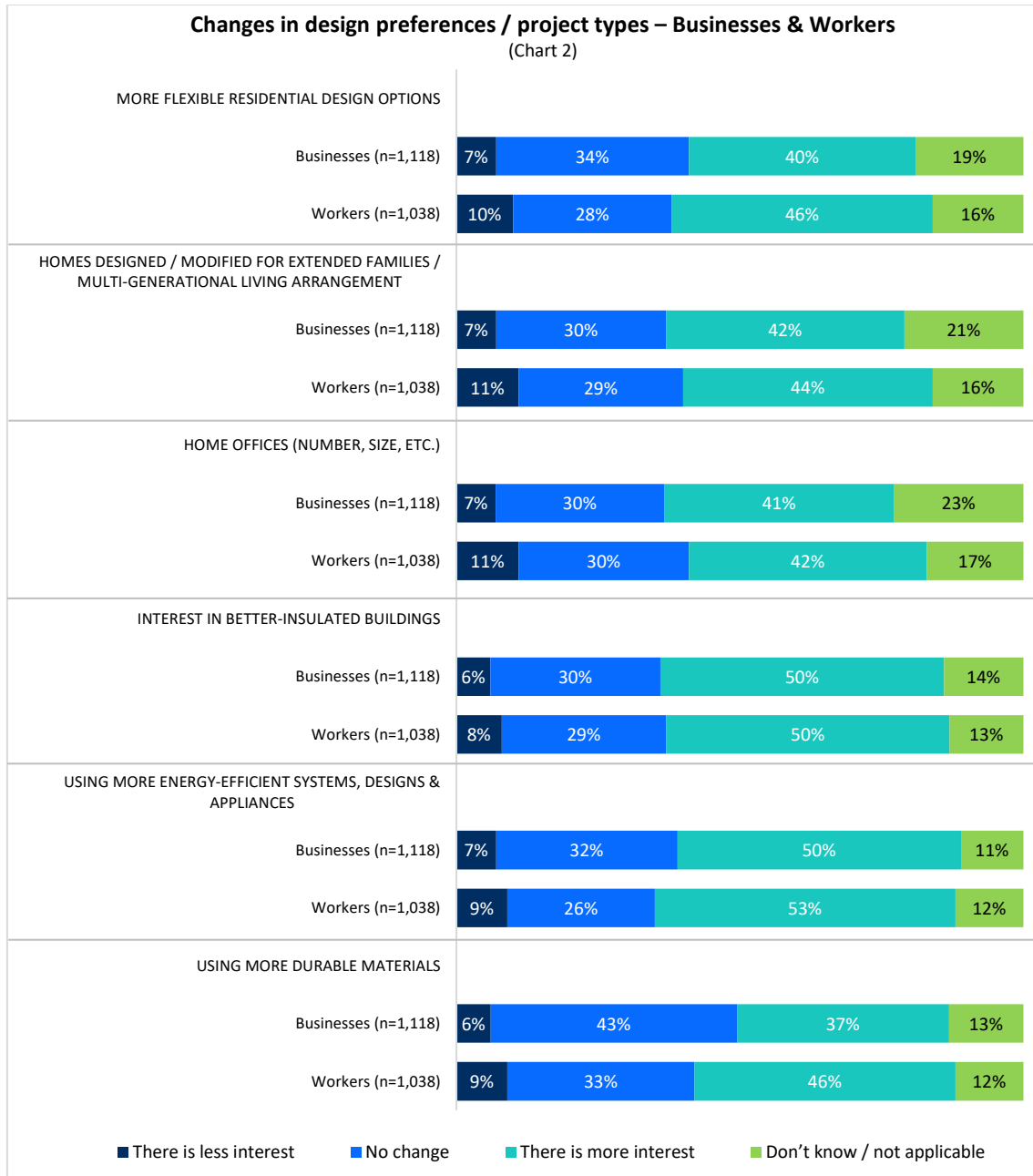


Figure 22: Changes in design preferences / project types – Businesses and Workers (II)



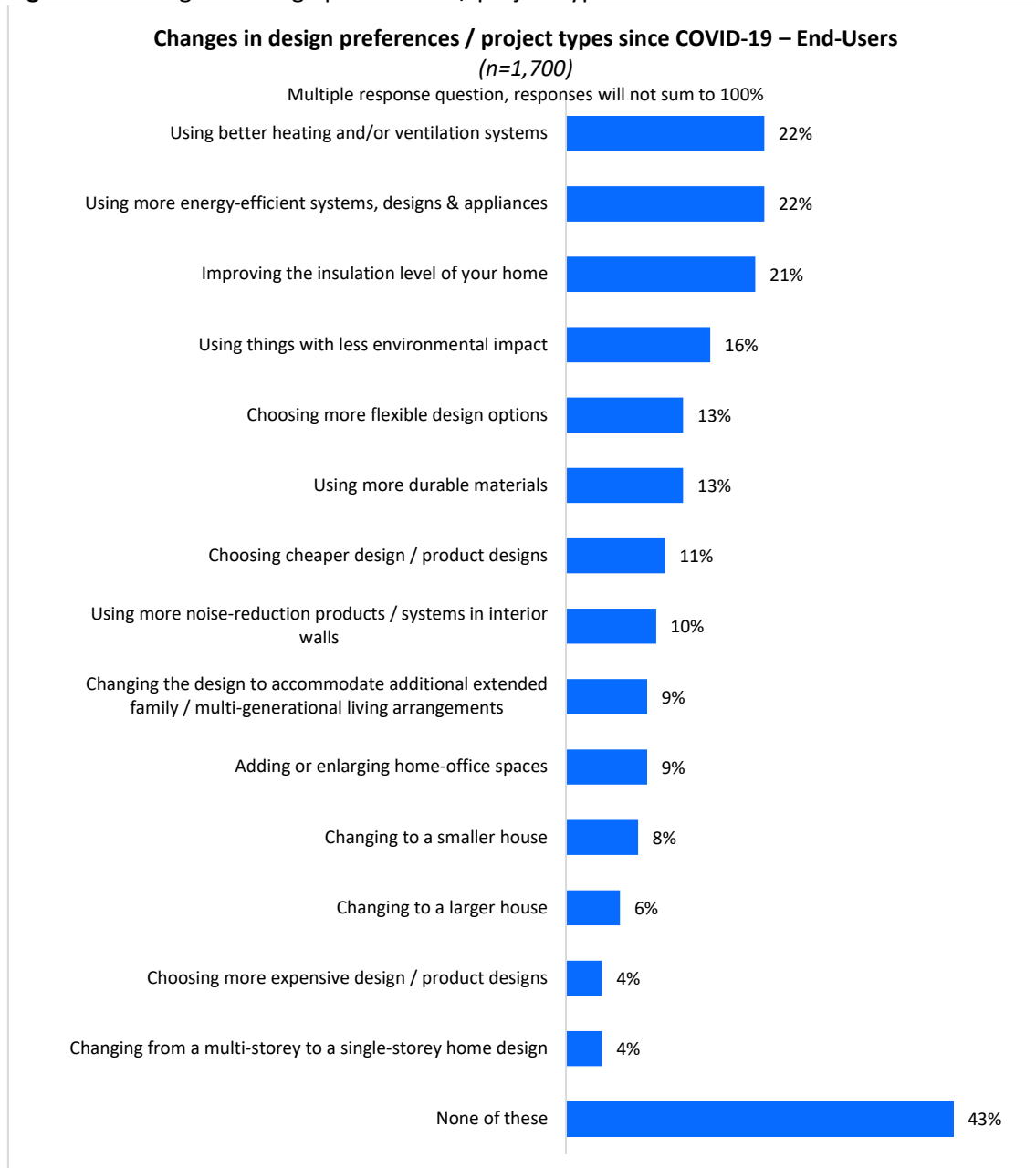
Changes in design preferences / project types since the COVID-19 pandemic – End-Users

(Question HC4/HD4/HE4 asked of End-Users)

“As frustrating as it was, it was a bit of a blessing in a way. Our consent was delayed with council working from home and general delays, so we actually got to put a bit more thought into what we had not really thought through on our plans.” – Qualitative End-User respondent

Where End-Users were concerned, *using better heating and/or ventilation systems, using more energy-efficient systems, designs and appliances and improving the insulation level of your home* were the most common changes in design preference since the COVID-19 pandemic. *Choosing more expensive design / product designs and changing from a multi-storey to a single-storey design* were the least preferred changes.

Figure 23: Changes in design preferences / project types – End-Users

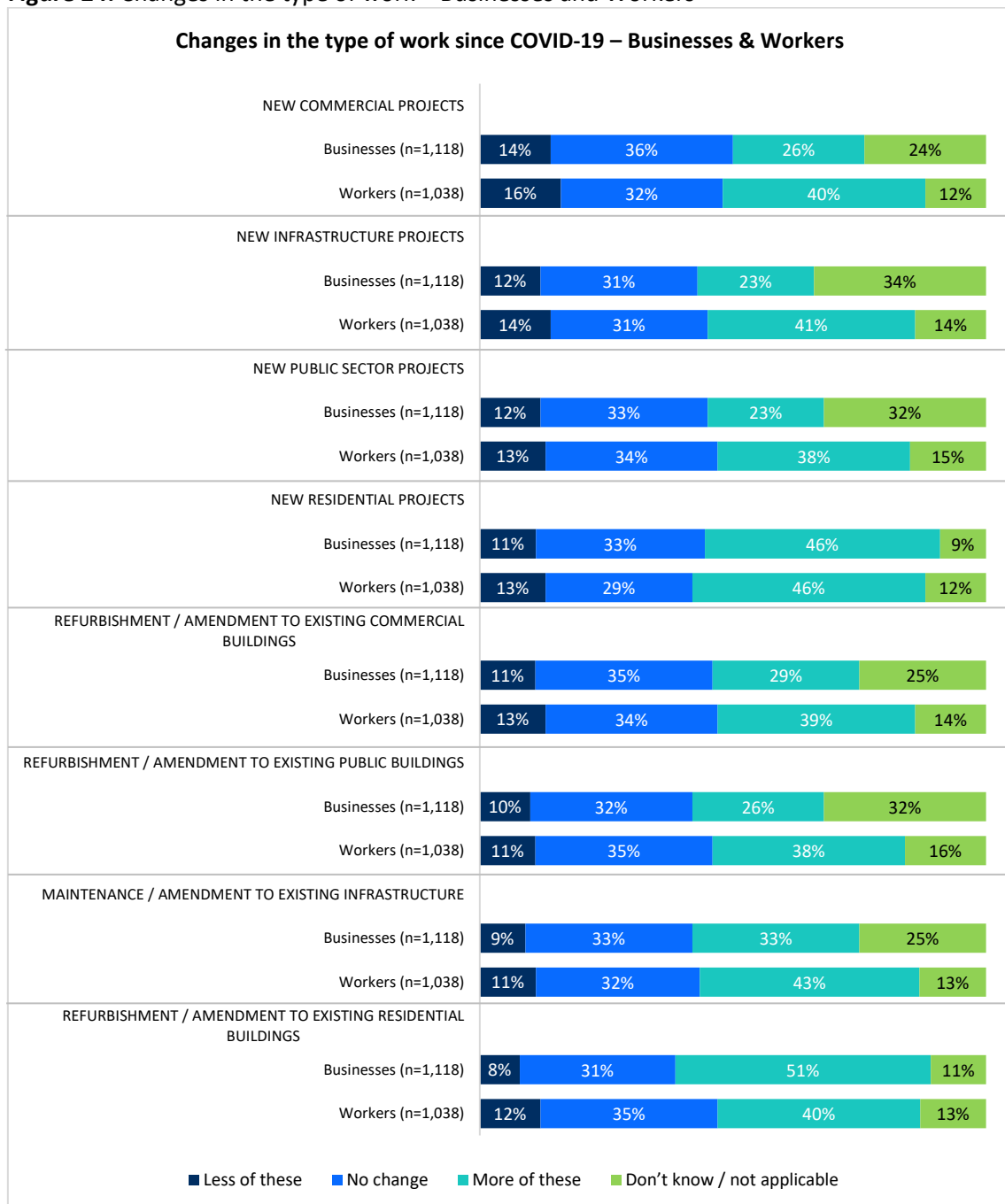


Changes in the type of work since the COVID-19 pandemic – Businesses and Workers

(Question QC4/WC4 asked of Businesses and Workers)

New residential projects and refurbishment / amendment to existing residential buildings were the building work with the highest increase since the COVID-19 pandemic. Almost half (46 per cent each) of Workers and Businesses mentioned an increase in new residential projects, whilst 43 per cent of Workers and 33 per cent of Businesses experienced an increase in maintenance / amendment to existing infrastructure. Two-fifths (40 per cent) of Workers reported an increase in new commercial projects compared with 26 per cent of Businesses.

Figure 24: Changes in the type of work – Businesses and Workers



Section 4: Financial, Staff and Management Impacts

Summary

The number of costly, problematic project completion delays; project management difficulties; rising product, freight, and compliance costs; and not having the staff to do the work were key issues for Businesses. The availability of tradespeople to provide quotes and complete the work were issues for End-Users. In contrast, Workers were generally more positive in their outlook across these issues.

Key Qualitative Results

Businesses and **Workers** were reporting tougher financial challenges. Although increased product costs were generally passed onto clients, some overhead costs were harder to pass on. Additionally, there were often penalty costs charged when deadlines were missed, and so the widespread delays in product delivery were having flow-on cost implications for businesses caught out by insufficient products. Some businesses were changing their staff contracts – moving staff onto project-specific contracts to remove their obligation to provide long-term work, or work that could be done when necessary products were unavailable. These additional business management complexities were generally found to be resulting in business managers having to work harder and longer for decreasing returns.

End-Users were also experiencing financial challenges in relation to their building projects, although many of these reflected broader issues such as housing and rental shortages, increasing house, product and rent prices, and logistical difficulties arising from project completion delays. The types of problems cited included quote delays (which also delayed loan approvals); delayed supplies and inability to get estimated delivery dates; consent delays; an inability to get builders, engineers, other key people; projects delayed or downgraded due to income uncertainty / pay cuts; product and freight price rises; delays on-site; over-stretched builders and/or builders not interested in smaller projects; and quoted jobs not being taken on by builders when quotes were accepted.

Key Quantitative Results

Businesses were generally experiencing revenue and sales that were same as, or better, than before the COVID-19 pandemic. However, this increased work and income was tempered by increased product, freight, compliance, and overhead costs, leading to reduced profit margins. This indicates that the increased costs were not being consistently passed onto clients, and affirms what we have learnt from the qualitative stage – that Businesses had to work much harder but for less margin.

As a result, around one-fifth of Businesses reported *reducing overheads* and *cancelling pay rises* and/or *bonuses* since the COVID-19 pandemic, but these actions were much more common in 2020, as were all the other problem-mitigation business practices we measured. In summary, cost-cutting measures were now much less prevalent – 34 per cent did none of these in 2020 and 44 per cent had

done none so far in 2021. Slightly over half had yet to use any external financial support (except the wage subsidy during the initial Level 4 nationwide lockdown in 2020).

Other macro indicators of financial problems in the industry were not overly evident, with quite low-level reporting of increased financial problems, such as reduced credit, increasing financial disputes or rising debt-servicing costs. Those who reported increasing problems in such areas were generally balanced by similar numbers reporting improvements. This might reflect the low interest rates that the economy experienced prior to and during the COVID-19 pandemic. However, as some commentators have stated (at time of writing) that interest rates were expected to rise towards the end of 2021, increases in such problems could reasonably be expected to occur.

Unfortunately, the same positive results did not apply to the other managerial aspects of running a building or construction business since COVID-19. The most commonly cited problems were:

- the number of costly, problematic project completion delays (42 per cent)
- the ease of project management and getting usual work done (41 per cent)
- the ease of future planning / forecasting (37 per cent)
- disputes around work timeframes with clients (35 per cent).

The increases in these problems were matched by increases in upcoming work in ‘the pipeline’ and the ease of securing more work in general – reinforcing the insight that Businesses might be very busy but are having to work much harder than normal when the deteriorating logistics of project management continue to make efficient work practices harder to achieve.

The increasing problems in project management reported by Businesses were noticed by **End-Users**, with around half reporting that:

- It has become harder to get tradespeople to do work (52 per cent) and provide quotes (49 per cent).
- There has been an increase in costly, problematic project completion delays (46 per cent).

Understandably, **End-Users** were five times more likely to report that planning future building work had become harder rather than easier.

Interestingly, **Workers** were much less likely to report the problems cited by their employers and more likely to state that things had got better rather than got worse, especially in the area of well-being and overall work conditions, and report better job security.

This appeared to suggest that business owners and senior management were bearing the brunt of the increased stressors facing the sector and were not necessarily communicating this to their workers, and that the Workers were getting treated well as a result of the tight labour market. Of concern was that Apprentices tended to have a more negative view of their workplace.

Additional Detail

Detailed, annotated tables showing differences amongst sub-samples (where statistically-significant differences exist) for this section can be found in Appendix C, tables 24-38.

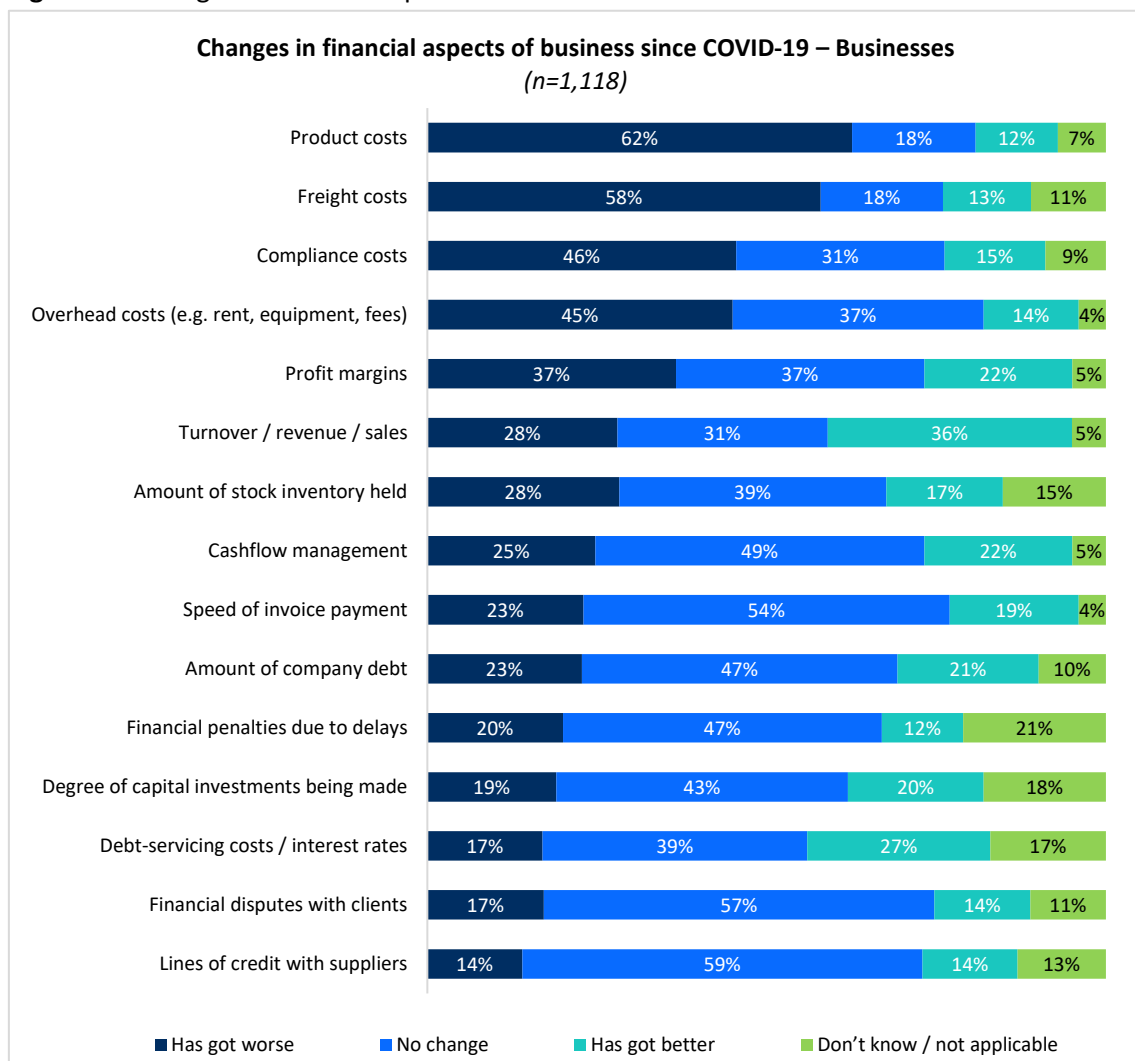
Changes in financial aspects of business since the COVID-19 pandemic – Businesses

(Question QD1 asked of Businesses)

“The price of containers has gone up from a few hundred to a few grand now, and it’s tough passing on the costs all the time, harder if they’re your own overheads” – Qualitative Business respondent

Product, freight and compliance costs were the financial aspects most likely to be perceived by Businesses as getting worse since the COVID-19 pandemic. For approximately one third (36 per cent), turnover / revenue / sales had improved.

Figure 25: Changes in financial aspects of business – Businesses



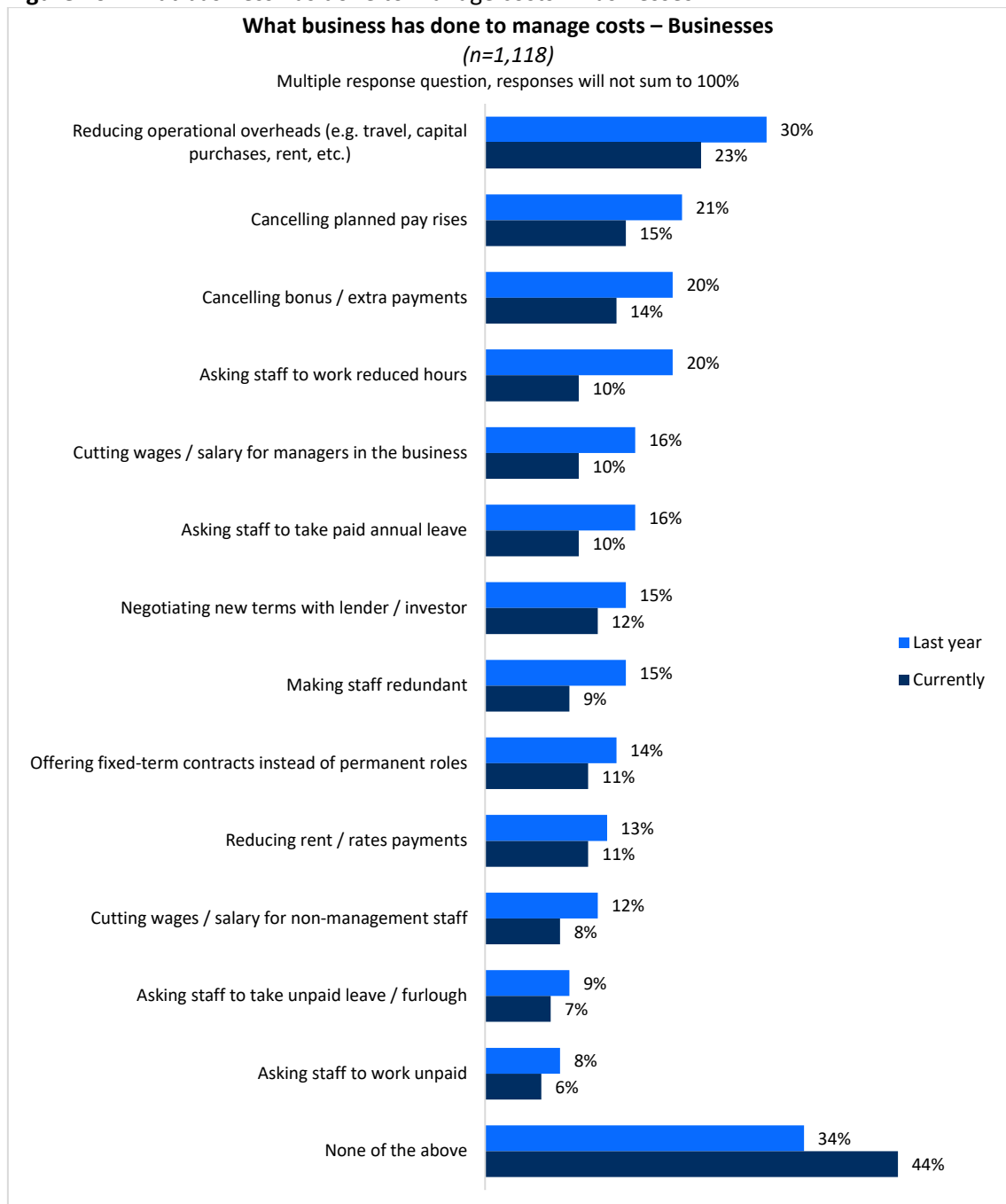
What business has done to manage costs – Businesses

(Question QD3a asked of Businesses)

“We’ve responded by sharpening the axe on processes moving forward and there is this recent restructure of the two sides of our company... no-one’s taken any pay cuts, but there has been a tightening of the belt around expenses – wining and dining clients and things like that. Our expense budget has been slashed somewhat.” – Qualitative Business respondent

Reducing operational overheads was the main way Businesses have sought to manage their costs, both this year and last year. Forty-four per cent stated they were currently not doing any of the cost-management practices listed, and such actions were generally less prevalent in 2021 than last year.

Figure 26: What business has done to manage costs – Businesses



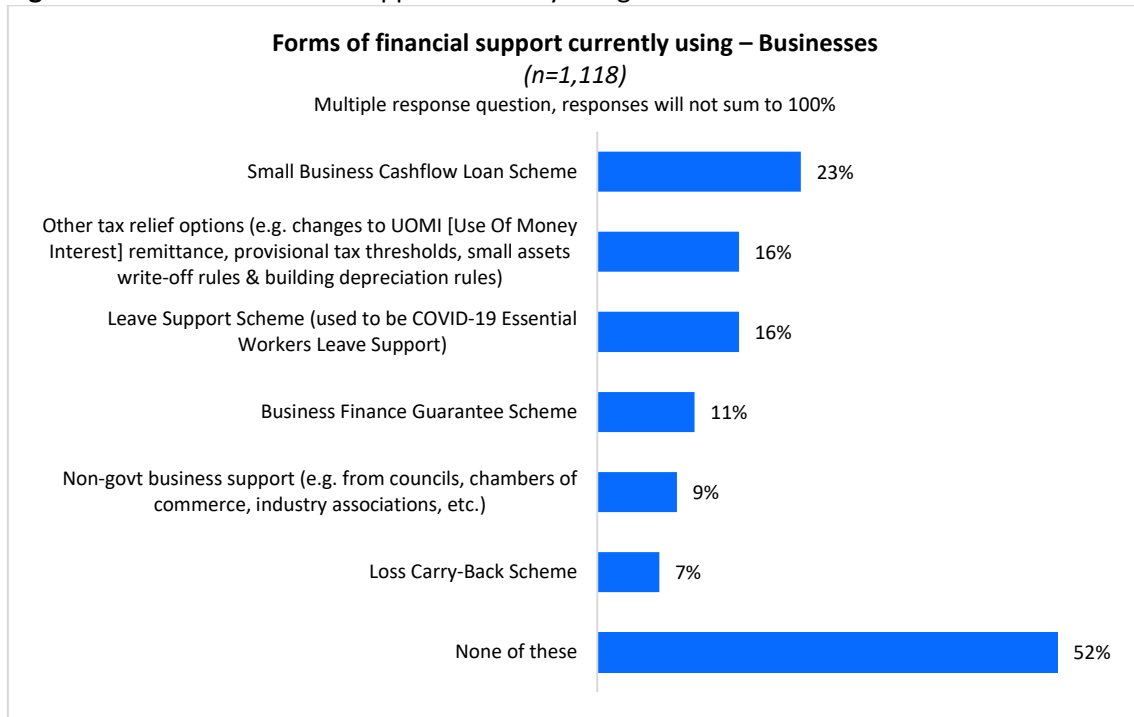
Forms of financial support Businesses are currently using

(Question QD3b asked of Businesses)

“People don't think it's a prudent thing to sink X dollars into something when you aren't sure if you are going to be able to service the lending on it.” – Qualitative Business respondent

Over half (52 per cent) of Businesses were not currently using any form of financial support. Those that were, were most likely to be using *the Small Business Cashflow Loan Scheme*.

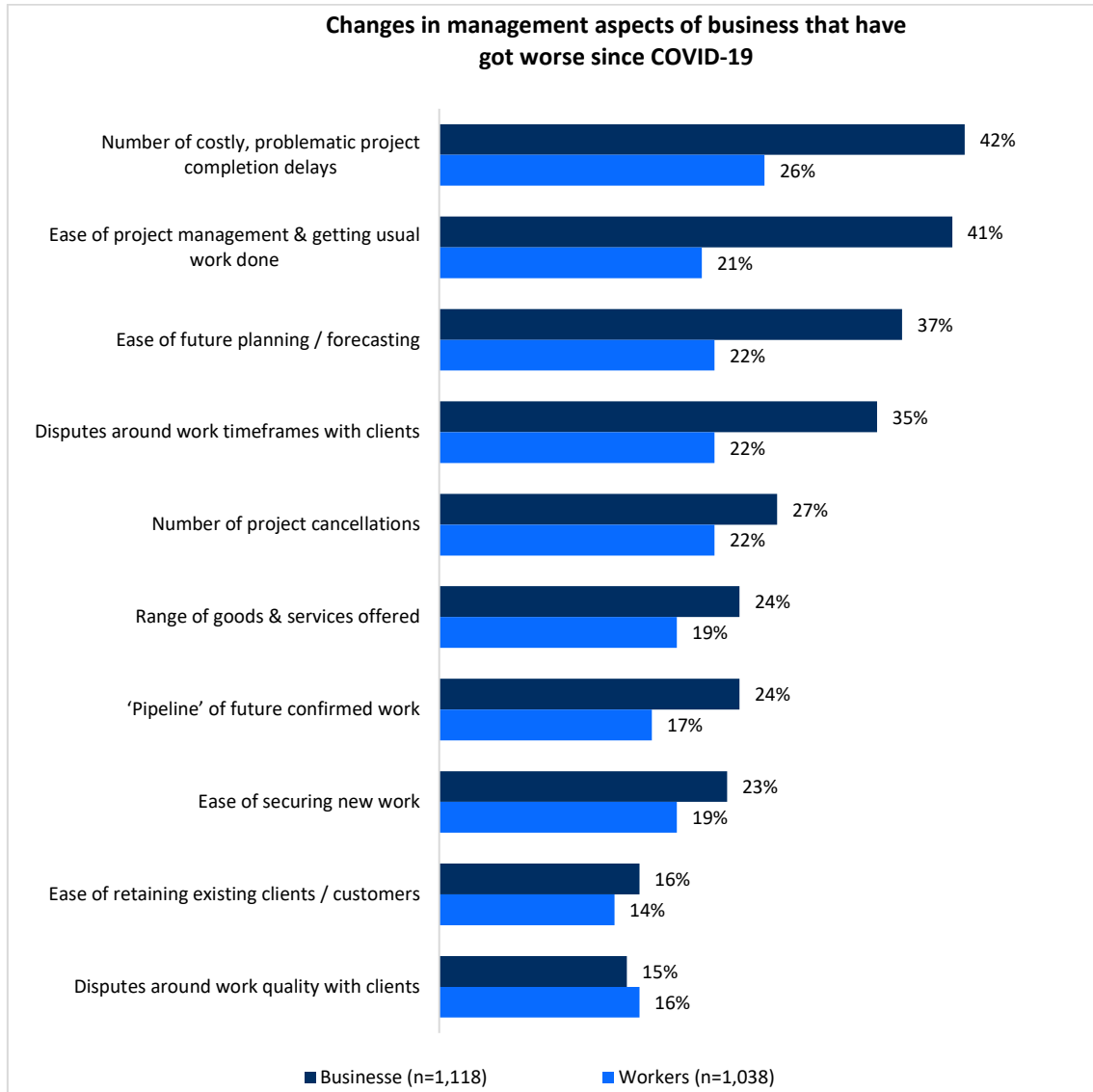
Figure 27: Forms of financial support currently using – Businesses



Changes in management aspects of business since the COVID-19 pandemic

Businesses were much more likely than Workers to perceive the managerial aspects of their businesses to have got worse since the COVID-19 pandemic, especially the *number of costly, problematic project completion delays*, followed by *ease of project management and getting usual work done*.

Figure 28: Changes in management aspects of business – Businesses and Workers



Changes in management aspects of business since the COVID-19 pandemic – Businesses

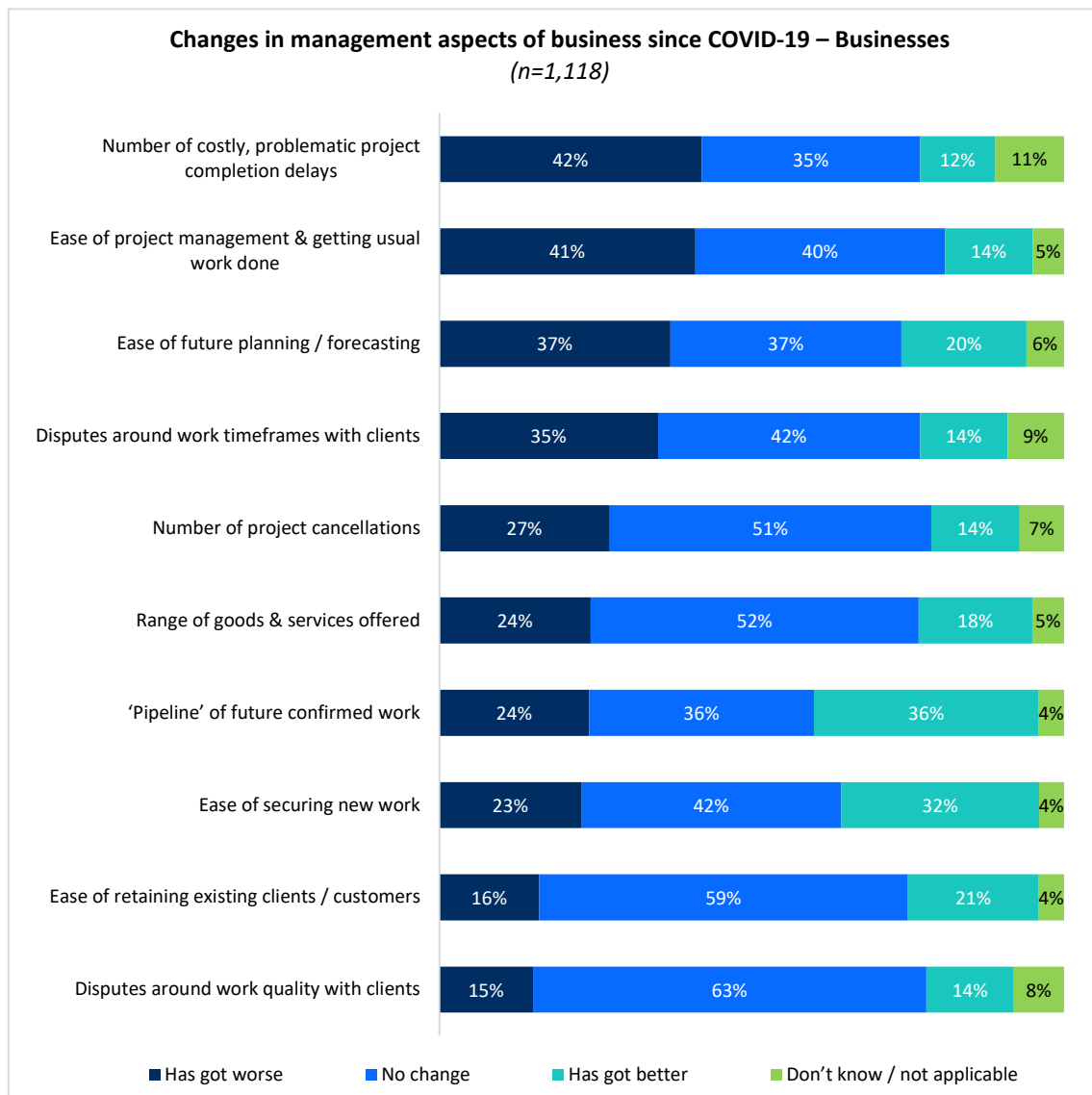
(Question QD2 asked of Businesses)

“When you plan something on a project you know in the back of your mind there could be a COVID breakdown, so you don't sit on your plans as much as before. You kind of roll with it. If we get notified today that tomorrow we lock down, there is no delay in the process.”

– Business

The number of costly, problematic project completion delays had got worse for Businesses since the COVID-19 pandemic, followed by ease of project management and getting usual work done. The ‘pipeline’ of future confirmed work had got better for 36 per cent of Businesses.

Figure 29: Changes in management aspects of business – Businesses



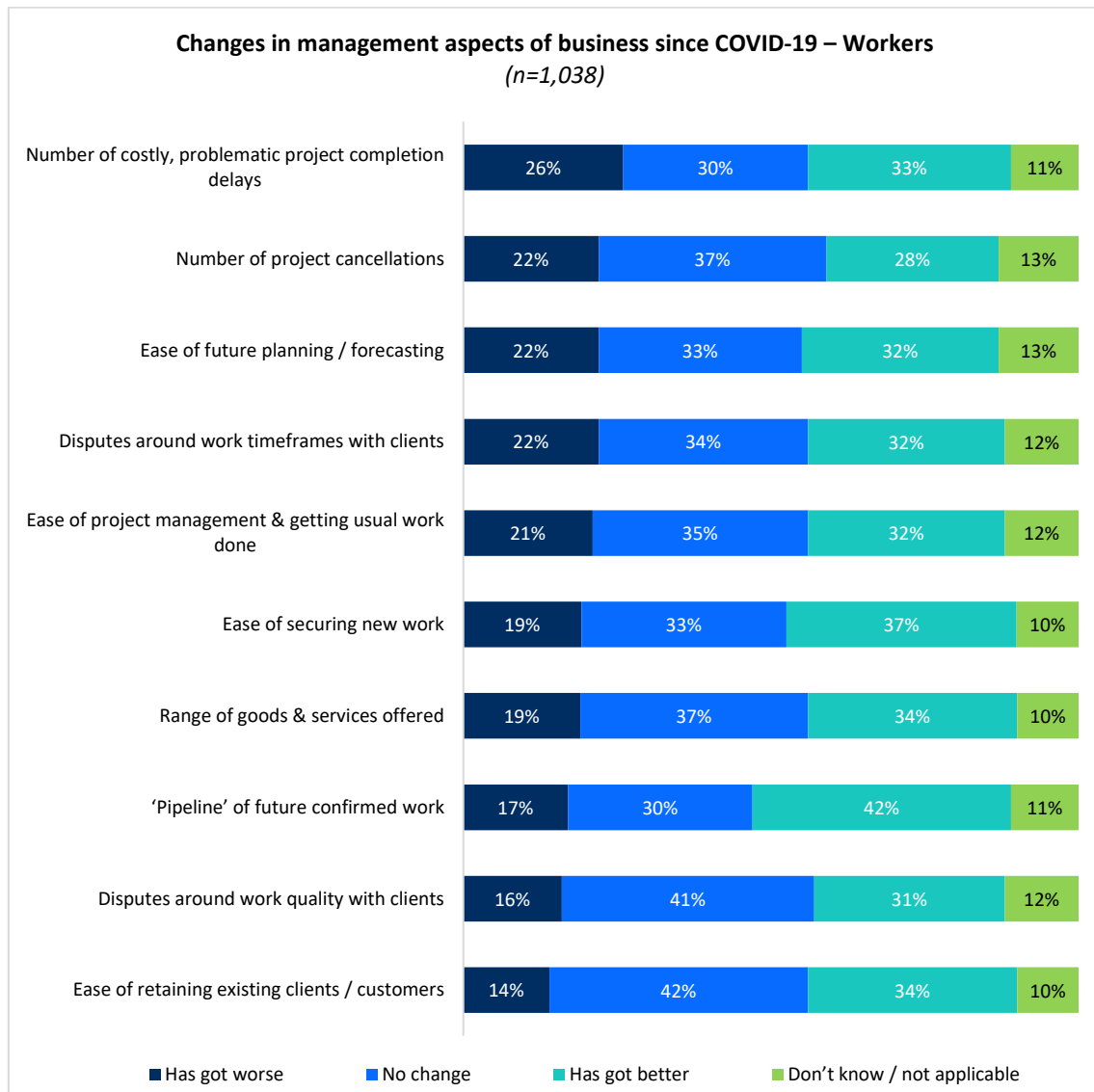
Changes in management aspects of business since the COVID-19 pandemic – Workers

(Question WD2 asked of Workers)

“Builders who can’t plan ahead are going to face some cash crunches; I reckon some will go under.” – Qualitative Worker respondent

When comparing Business and Workers’ perceptions of changes in management aspects of the business, Workers were more likely to report that the situation had become better. Specifically, the ‘pipeline’ of future confirmed work had got better for 42 per cent of Workers.

Figure 30: Changes in management aspects of business – Workers



What management had done to manage costs – Workers

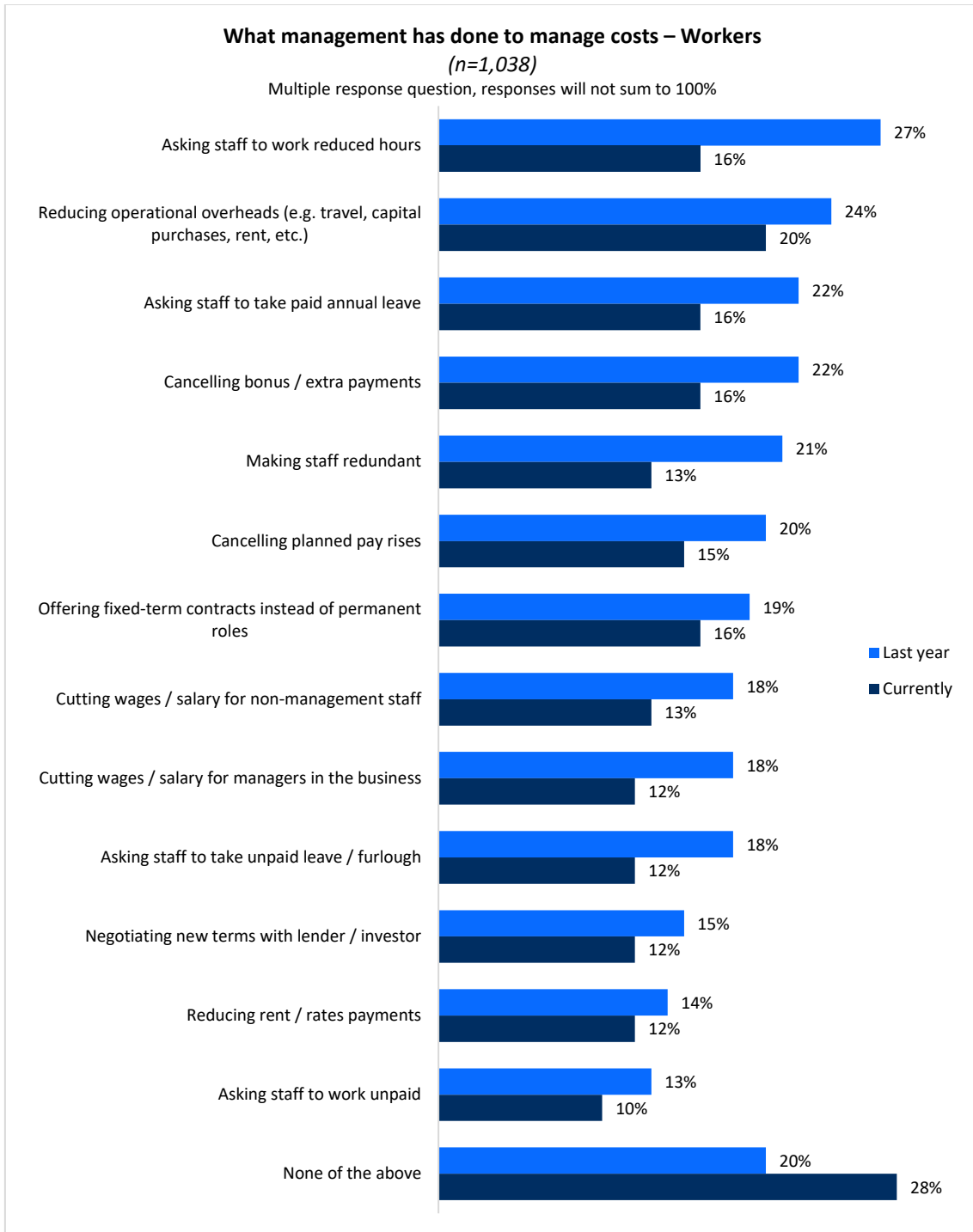
(Question WD3 asked of Workers)

“Even though we’re busier, we’re working much harder to do what used to be routine, so the margins go down and the stress and workload goes up.” – Qualitative Worker respondent

In the past year, 80 percent of workers reported that management had tried to manage costs of the business (cf., 72 per cent in the current year). The four most common ways of doing this were to:

- ask staff to reduce their hours (27 per cent)
- reduce the operational overheads (e.g., travel, capital purchases, rent, etc.) (24 per cent)
- ask staff to take paid annual leave (22 per cent)
- cancel bonus and extra payments (22 per cent).

Figure 31: What management had done to manage cost – Workers



Financial and project management impacts – End-Users

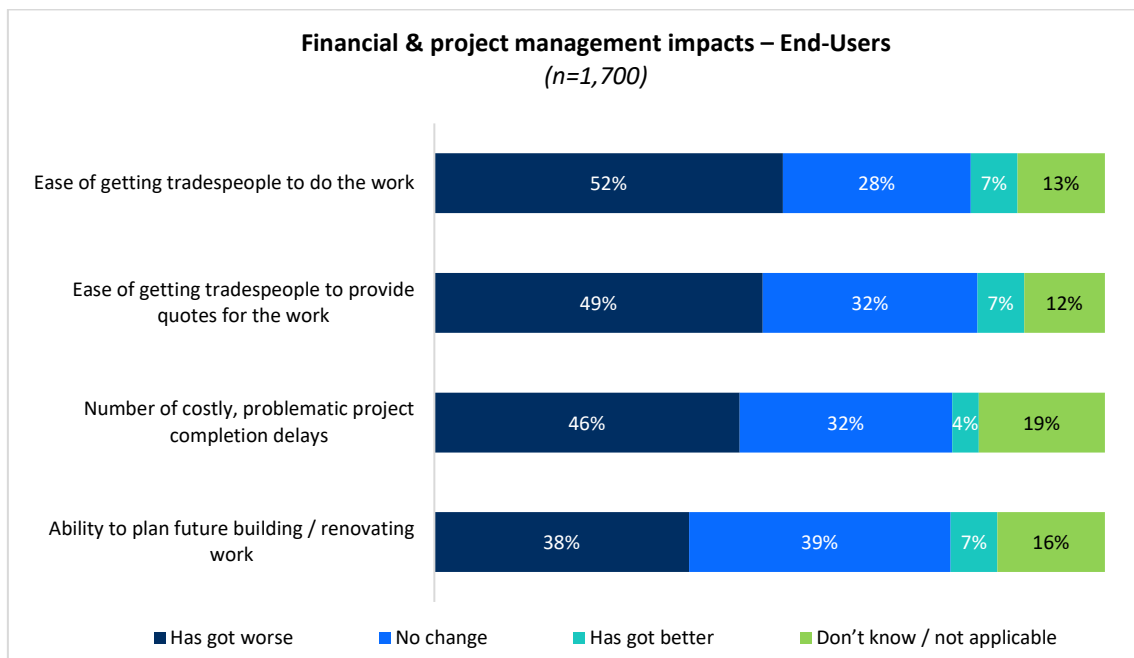
(Question HC5/HD5/HE5 asked of End-Users)

“Builders say ‘We go out and give quotes and we don't make any money off quotes, and we are booked up for over a year’... you can see their point.” – Qualitative End-User respondent

The overall theme was that all the financial and project management aspects had got much worse rather than better – 38 to 52 per cent of End-Users reporting things getting worse versus no more than 7 per cent feeling that they had got better.

The *ease of getting tradespeople to do the work* had got worse for just over half of End-Users (52 per cent). However, for 39 per cent, the *ability to plan future building / renovating work* had not changed.

Figure 32: Financial and project management impacts – End-Users



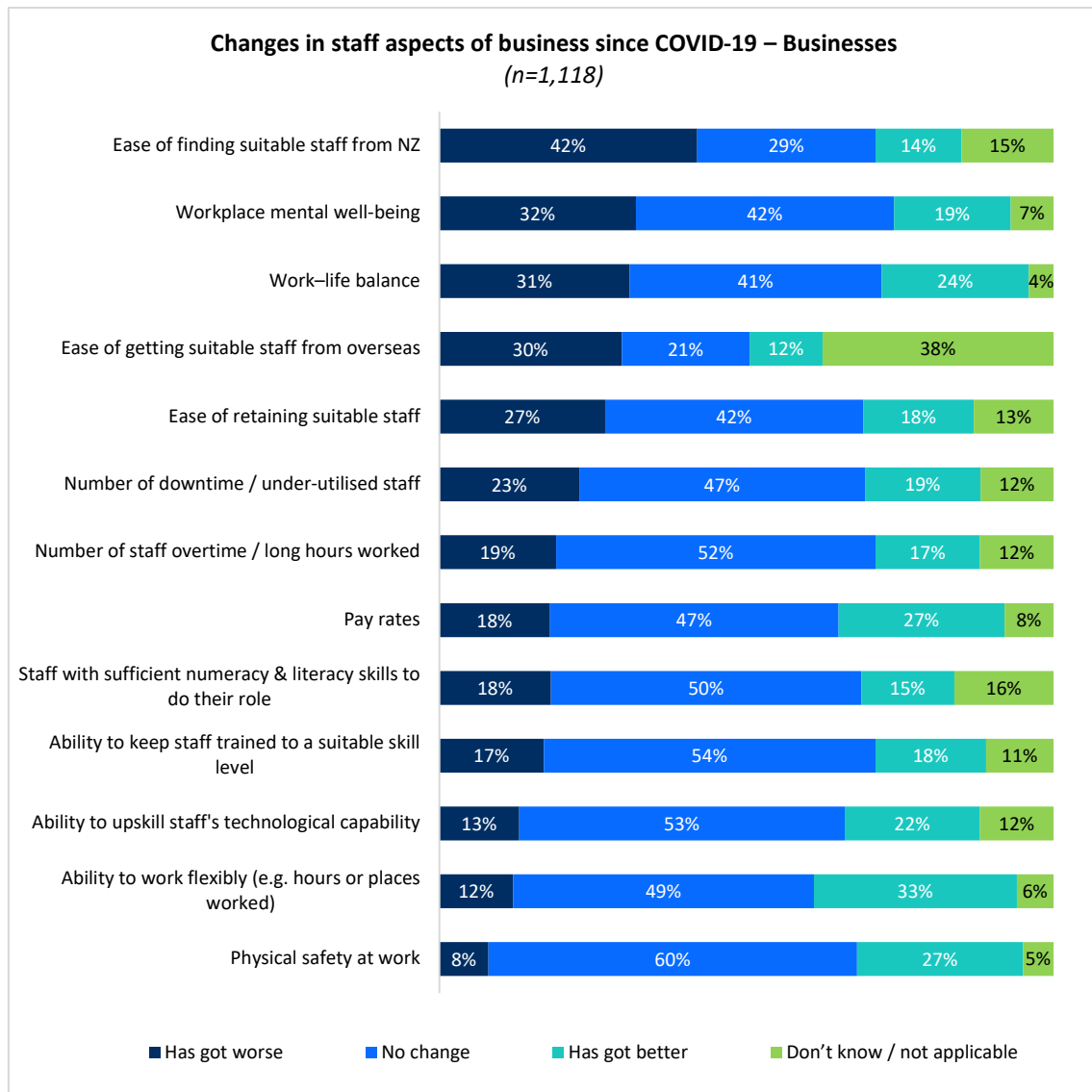
Changes in staff aspects of business since the COVID-19 pandemic – Businesses

(Question QD4 asked of Businesses)

“There is a lack of available resources to do the work, and that is impacted by COVID. They are finding it hard to find guys – labourers or even design minds from around the world.”
– Business

The ease of finding suitable staff from New Zealand was a pain point that had worsened for 42 per cent of Businesses since the COVID-19 pandemic; however, pay rates were perceived as getting better (27 per cent). One-third (32 per cent) believed that workplace mental well-being had also got worse.

Figure 33: Changes in staff aspects of business – Businesses



Changes in staff aspects of business since the COVID-19 pandemic – Workers

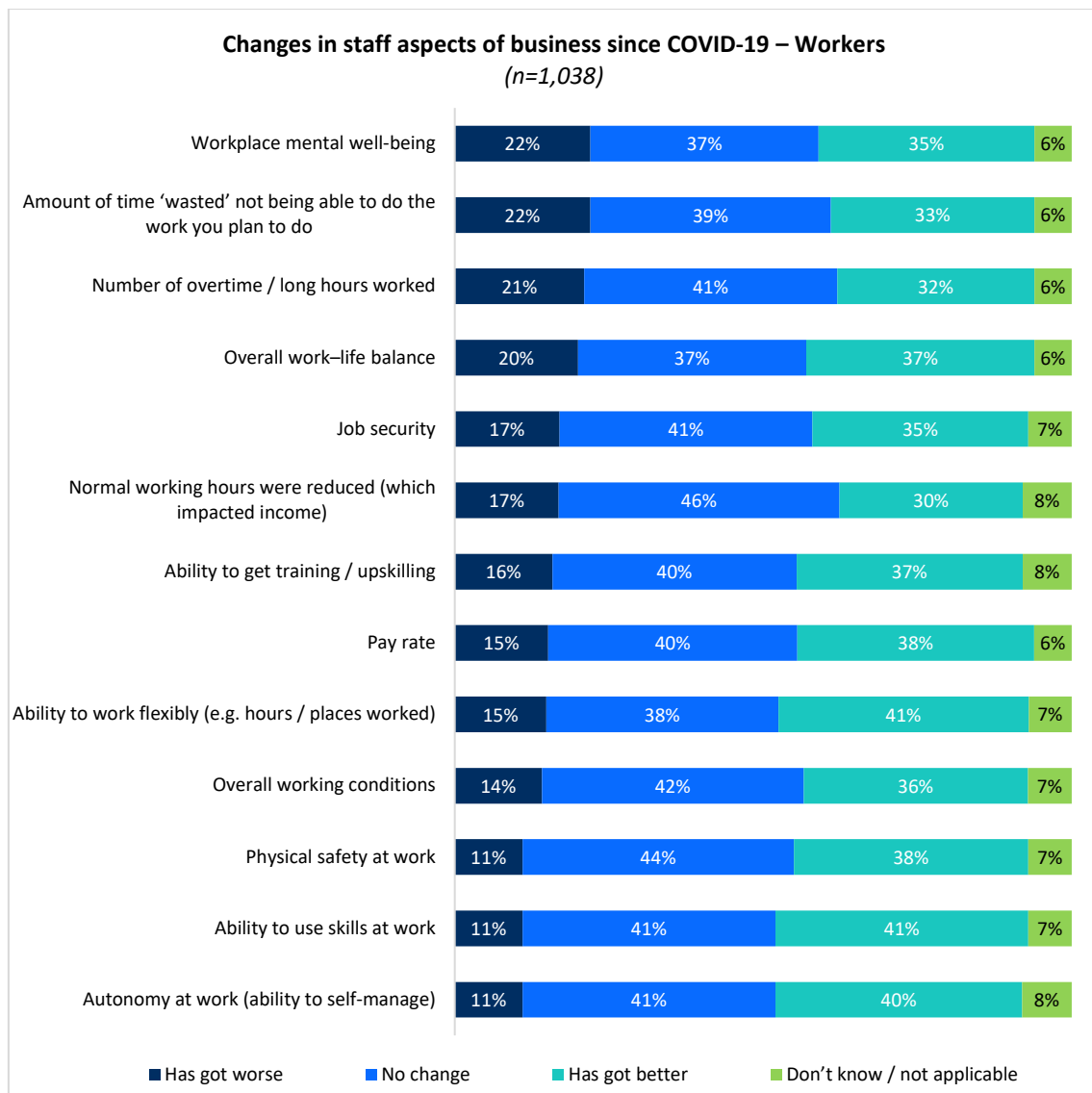
(Question WD4 asked of Workers)

“Any given day at least one staff member is working from home. That has been normalised, I would say. I think it's a good thing. It helps with flexibility in people's lives.” – Qualitative Worker respondent

“It sounds terrible, but we need Auckland to go into Level 4 so it puts the brakes on whilst the mills down south can catch up with demand.” – Qualitative Worker respondent

The majority of staff business aspects were perceived by Workers as either not changing or getting better, since the COVID-19 pandemic. In particular, the *ability to work flexibly* and the *ability to use skills at work* were noted as having improved (41 per cent each). *Workplace mental well-being* and *time ‘wasted’ not being able to do the work they planned to* were the two main factors Workers believed to have worsened (22 per cent each).

Figure 34: Changes in staff aspects of business – Workers



Section 5: Industry Observations / Compliance

Summary

There were non-complaint behaviours occurring in the sector, and while no such behaviour should be condoned, it reflected a sector that was under-staffed and very busy. Workers reported working long hours, sometimes doing work they were not skilled for, or doing it without following COVID-19 health and safety protocols. End-Users were noticing these issues too.

Key Qualitative Results

Businesses and Workers

Those working in the industry reported that work quality had sometimes fallen due to staffing shortages and disruptions. Some cited observing non-compliant work practices amongst certain ethnic groups, e.g., not following COVID-19 protocols, living on-site and/or generally doing fast, poor-quality work. The lack of policing was seen as creating an unfair playing field. Boom markets were also perceived as attracting more cowboys and poor-quality workers.

End-Users

There were reports of builders declining to do work when their quotes were accepted and also of builders not even wishing to give quotes as they had such a backlog.

Key Quantitative Results

Businesses were more likely to report non-compliant practices being observed or heard about in other companies (76 per cent) rather than occurring in their own companies (53 per cent).

The most commonly cited 'atypical' behaviour was *product stockpiling*, which reflects the problem of product under-supply reported earlier, while also contributing to the problem through the purchase of products that might be more urgently required by other businesses.

Amongst the more serious behaviours, around a quarter had heard or observed other **Businesses** and/or **Workers**:

- failing to comply with all the COVID-19 health and safety protocols (27 per cent)
- "cutting corners" due to work pressure (24 per cent)
- performing work tasks outside their skill set (24 per cent)
- making unapproved product substitutions (22 per cent).

Additionally, **Businesses** reported that they themselves:

- were not always able to follow all the COVID-19 health and safety protocols (14 per cent)
- had asked their workers to complete tasks outside their skill set (12 per cent)
- had asked their workers to “cut corners” due to work pressures (10 per cent).

Workers were more likely to report the problem behaviours covered (whether experienced or observed in others). Specifically, around a quarter reported that they had experienced:

- being unable to take rest / meal breaks (23 per cent)
- being asked to work unpaid overtime (23 per cent)
- being unable to comply with all the COVID-19 health and safety protocols (23 per cent).

This reflects the result discussed earlier, in that while Workers overall appeared to be enjoying good working conditions, due in part to the reported staff shortage, this was also potentially leading to some overwork / underpay.

For **End-Users**, product issues were also evident, with the most commonly cited issue being higher-than-estimated product costs. Other widespread issues were having to agree to substitute products, project delivery delays and general price rises that were attributed to the COVID-19 pandemic. A third felt that *tradespeople “cutting corners” to save time / money* had increased since the pandemic, which probably reflected their experience of projects taking longer and costing more.

Additional Detail

Detailed, annotated tables showing differences amongst sub-samples (where statistically-significant differences exist) for this section can be found in Appendix C, tables 39-54.

Business practices heard of or implemented in the past 12 months – Businesses

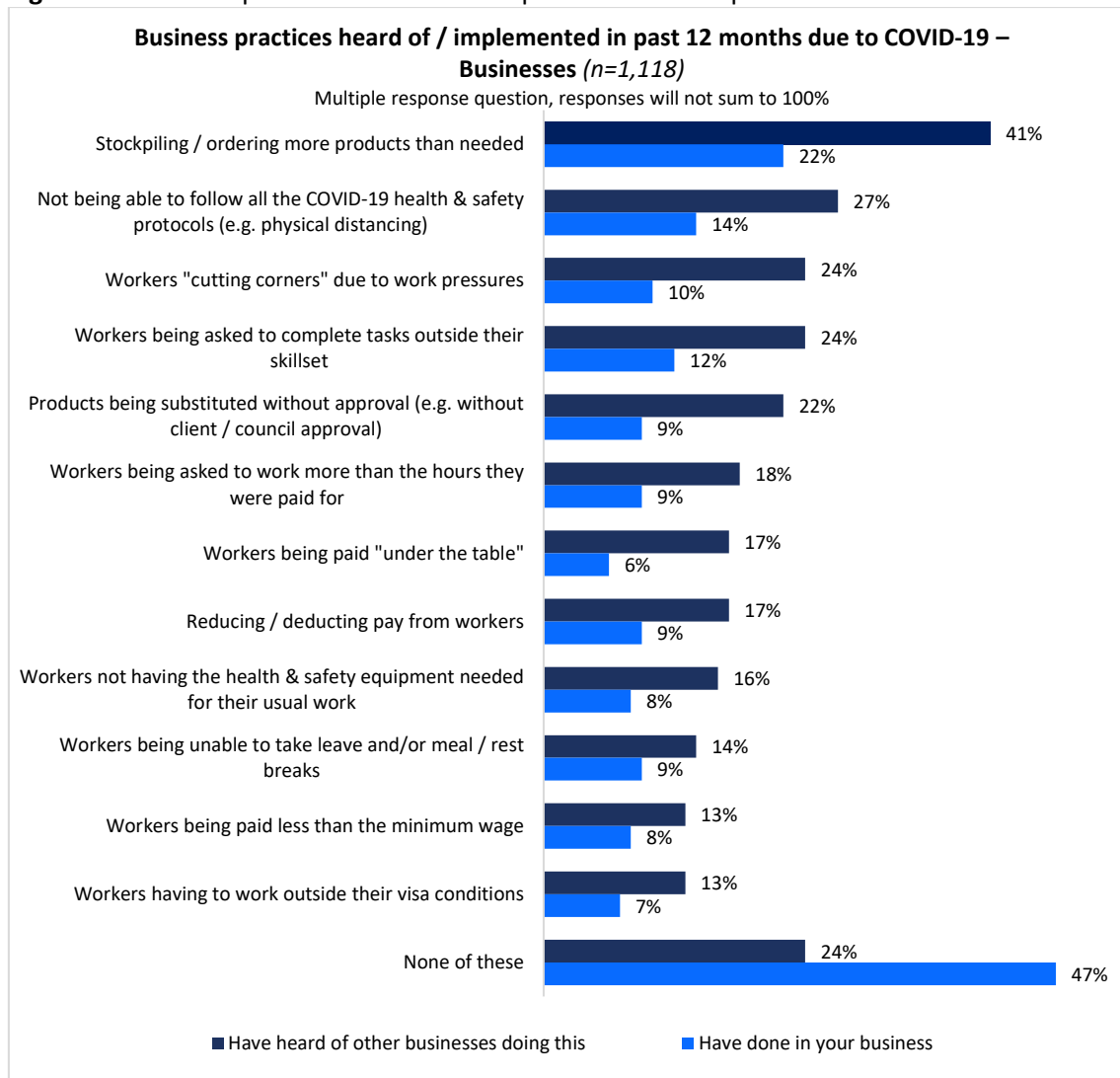
(Question QE1 asked of Businesses)

“You can’t rely on just popping into Bunnings the day you need something anymore, you have to order weeks or months in advance.” – Qualitative Business respondent

Businesses were more likely to hear about other Businesses *stockpiling / ordering more products than needed* (41 per cent), *not being able to follow all COVID-19 health & safety protocols* (27 per cent), *workers “cutting corners” due to work pressures* (24 per cent) and *workers being asked to complete tasks outside of their skill set* (24 per cent).

Sixty-seven per cent of Workers and 53 per cent of Businesses reported that they had experienced/implemented these types of business practices.

Figure 35: Business practices heard of or implemented in the past 12 months – Businesses



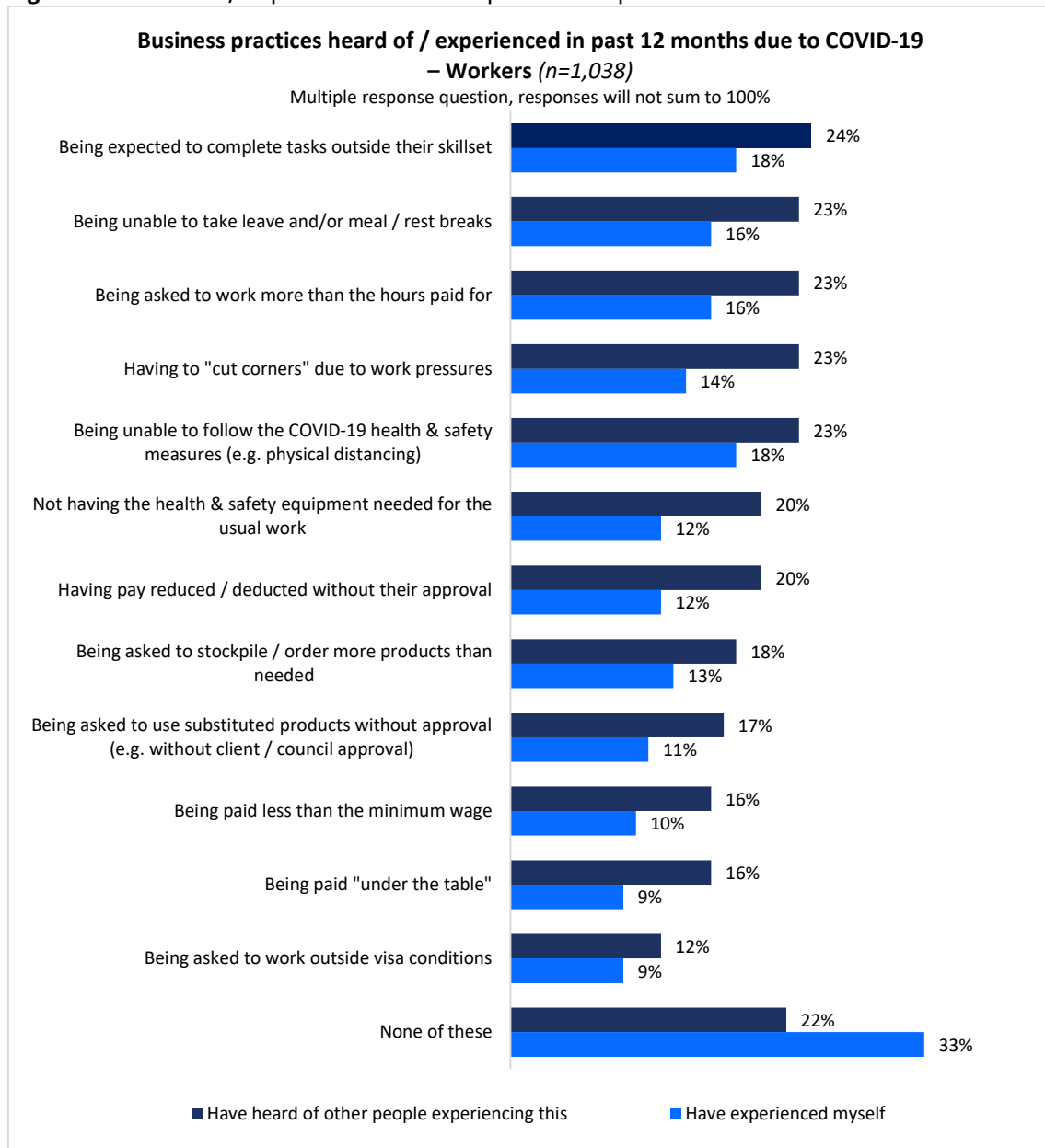
Business practices heard of or experienced in the past 12 months – Workers

(Question WE1 asked of Workers)

“It’s a bit rough when you reduce the number of guys you have on a site to be compliant and the site next door is packed with workers with nobody wearing masks” – Qualitative Business respondent

Workers were more likely to hear of Businesses doing these things rather than personally experiencing them. It was most common for Workers to hear of others *being expected to complete tasks outside their skill set*. Just under seven in ten had experienced some of these things. Of those who had, 18 per cent reported that they were expected to *complete tasks outside their skill set* and were *unable to follow the COVID-19 health and safety measures (e.g., physical distancing)*.

Figure 36: Heard-of / experienced business practices in past 12 months – Workers



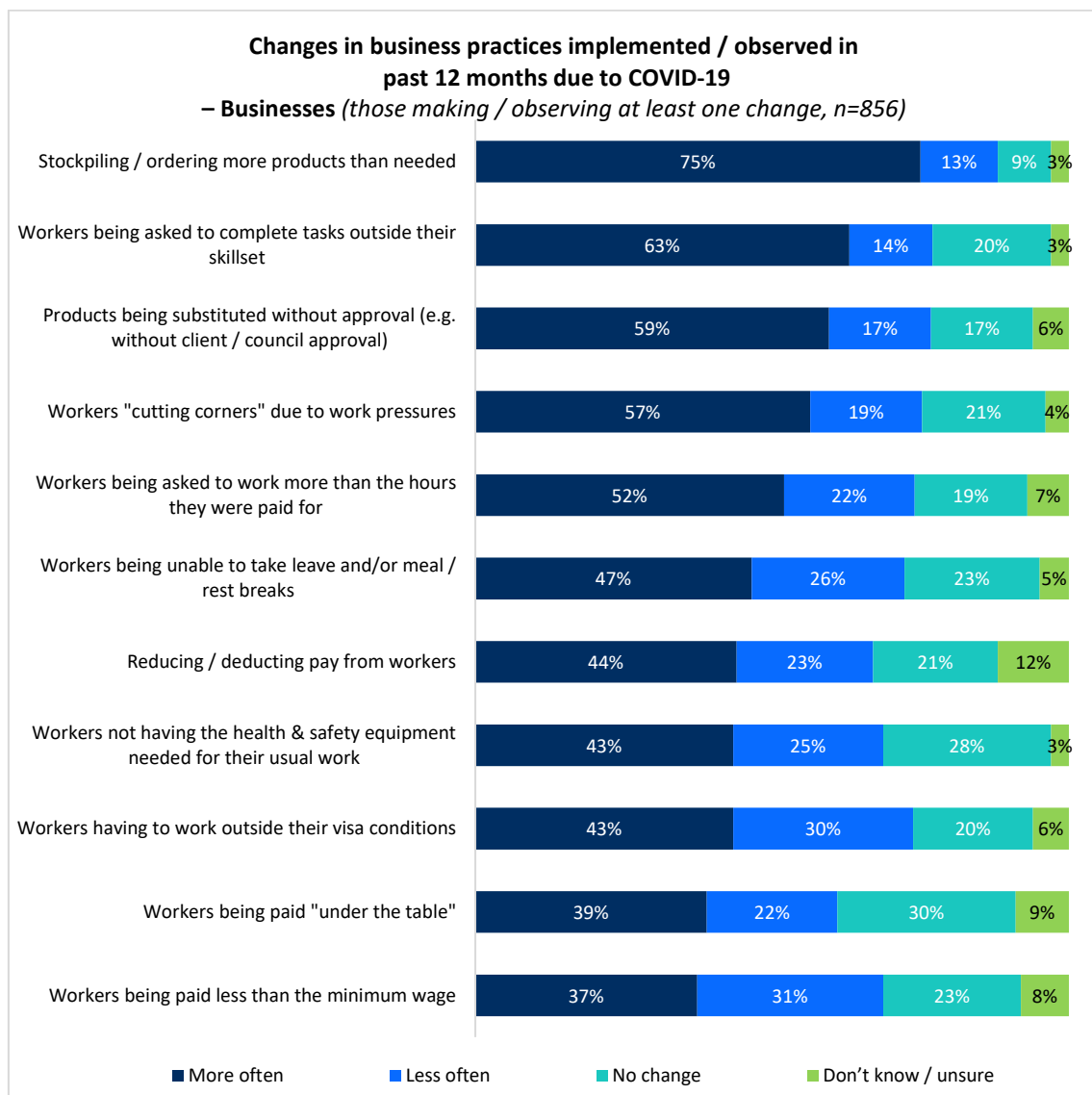
Business practice changes in the past 12 months – Businesses

(Question QE2 asked of Businesses who have implemented / observed at least one of the changes listed)

“There’s a few building sites I see that are still noisy in weekends, those are builders working overtime to meet deadlines” – Qualitative Worker respondent

The most common practices that Businesses observed or engaged in more often due to the COVID-19 pandemic were: *stockpiling / ordering more products than needed* (75 per cent); *workers being asked to complete tasks outside their skill set* (63 per cent); *products being substituted without approval* (59 per cent); *workers “cutting corners” due to work pressures* (57 per cent); and *workers being asked to work more than hours they were paid for* (52 per cent).

Figure 37: Changes in business practices implemented / observed in past 12 months – Businesses



Business practice changes in the past 12 months – Workers

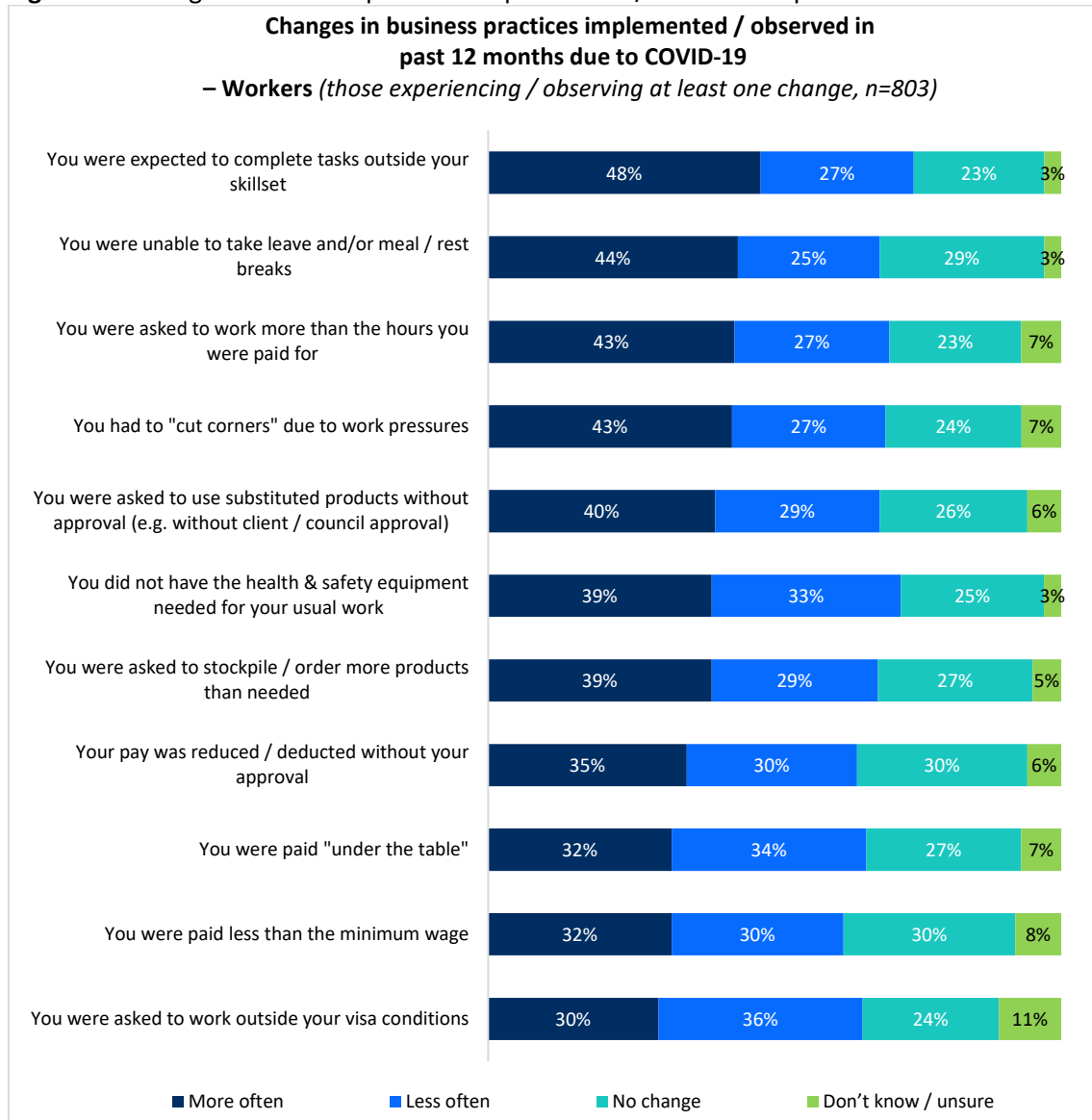
Question WE2 asked of Workers citing any changes

“I’m seeing builders who have only ever done commercial getting into residential, and they’re not up to it, sometimes I go into a house and can see some pretty average work’s been done – big bows in the GIB, that sort of thing.” – Qualitative Worker respondent

“Even though we’re busier, we’re working much harder to do what used to be routine, so the margins go down and the stress and workload goes up.” – Qualitative Worker respondent

Just under half of Workers experienced or observed the following practices more often due to the COVID-19 pandemic: *having to complete tasks outside their skill set* (48 per cent), *being unable to take leave / meal / rest breaks* (44 per cent), *being asked to work overtime* (43 per cent) and *having to “cut corners” due to work pressures* (43 per cent).

Figure 38: Changes in business practices implemented / observed in past 12 months – Workers



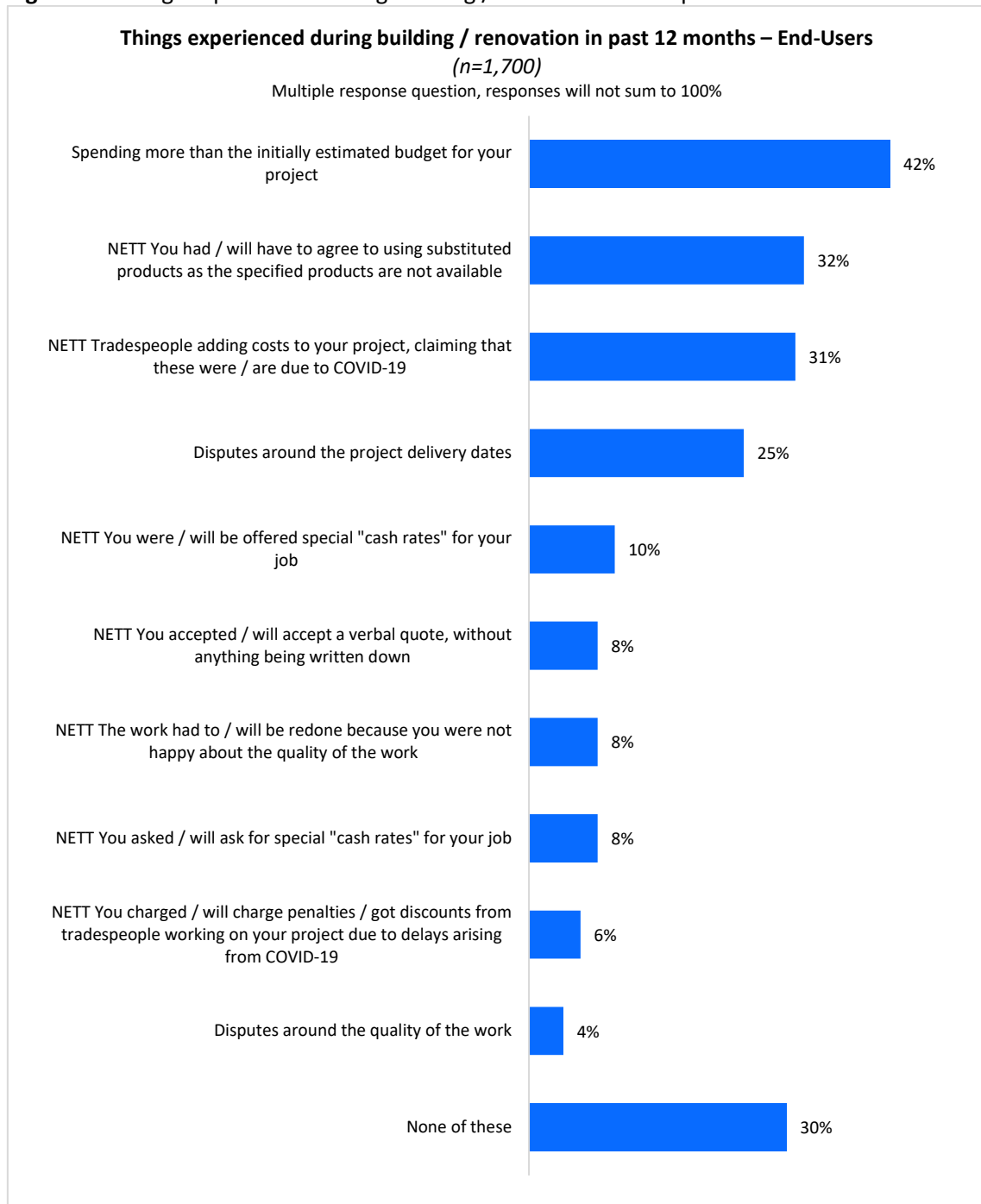
Things experienced during building / renovation in the past 12 months – End-Users

(Question HC6/HD6/HE6 asked of End-Users)

“Our builder was saying they are completely booked up for the rest of the year and there are actually no sections available.” – Qualitative End-User respondent

Just over four in ten of End-Users reported going over the estimated budget on their project, and around one third mentioned they *had to / anticipated having to agree to use substituted products*. A similar proportion (31 per cent) stated that *costs had been added to their project by tradespeople, citing the COVID-19 pandemic as the reason*.

Figure 39: Things experienced during building / renovation in the past 12 months – End-Users



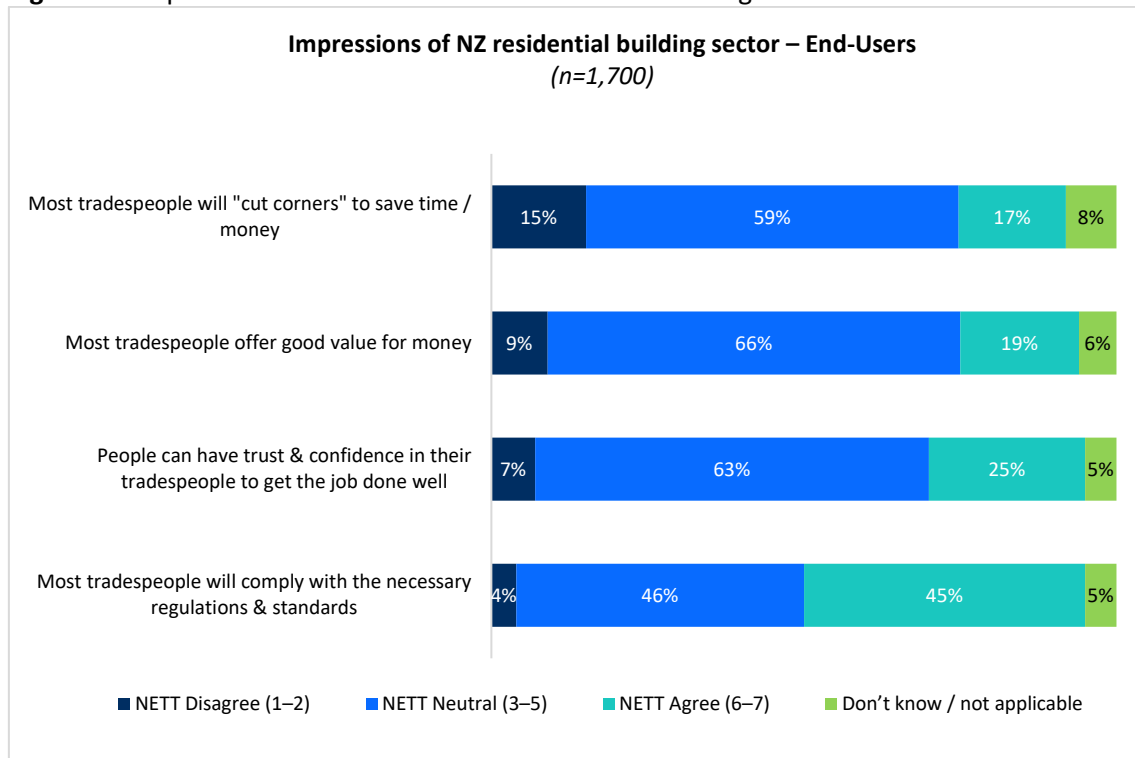
End-Users' impressions of the New Zealand residential building sector

(Question H11 asked of End-Users)

"It's really hard finding a builder now, frustrating when you accept their quote but then they say they can't start your project for a year" – Qualitative End-User respondent

Forty-five per cent of End-Users agreed that *most tradespeople will comply with regulations and standards*. There was lower agreement for the other statements, with the majority of End-Users feeling neutral.

Figure 40: Impressions of the New Zealand residential building sector – End-Users



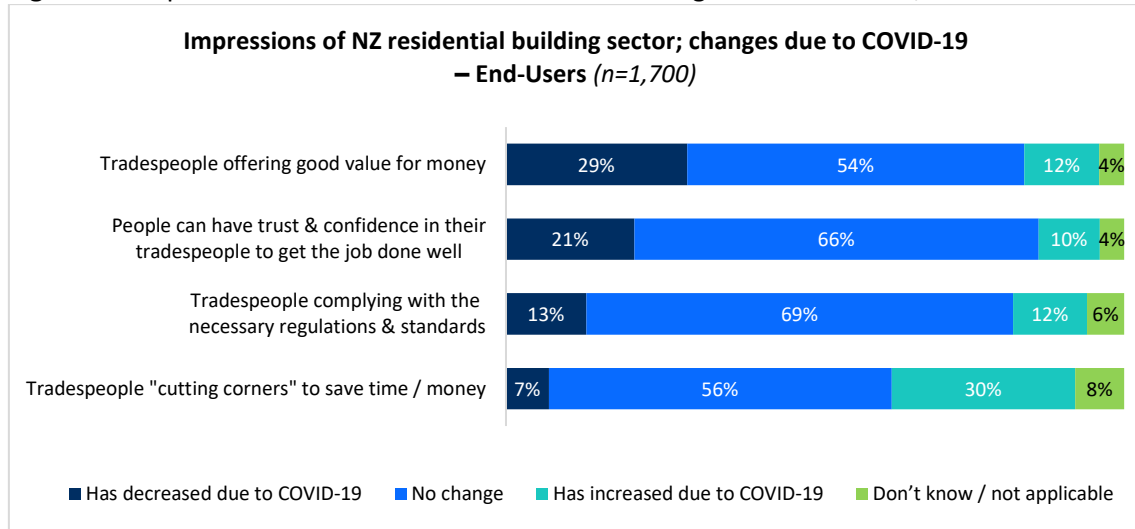
End-Users' impressions of the New Zealand residential building sector due to COVID-19 pandemic

(Question HI2 asked of End-Users)

"I approached 5 or 6 builders in the area before I found someone who could do it, and even then, he ended up rescheduling and delaying the start by a few months – just being busy, overworked!" – Qualitative End-User respondent

Three in ten End-Users stated that *tradespeople "cutting corners" to save time / money* has increased due to the pandemic, whilst a similar proportion (29 per cent) believed that *tradespeople offering good value for money* had decreased since the COVID-19 pandemic. *Trust and confidence in tradespeople to do a good job* had also decreased.

Figure 41: Impressions of New Zealand residential building sector increased / decreased – End-Users

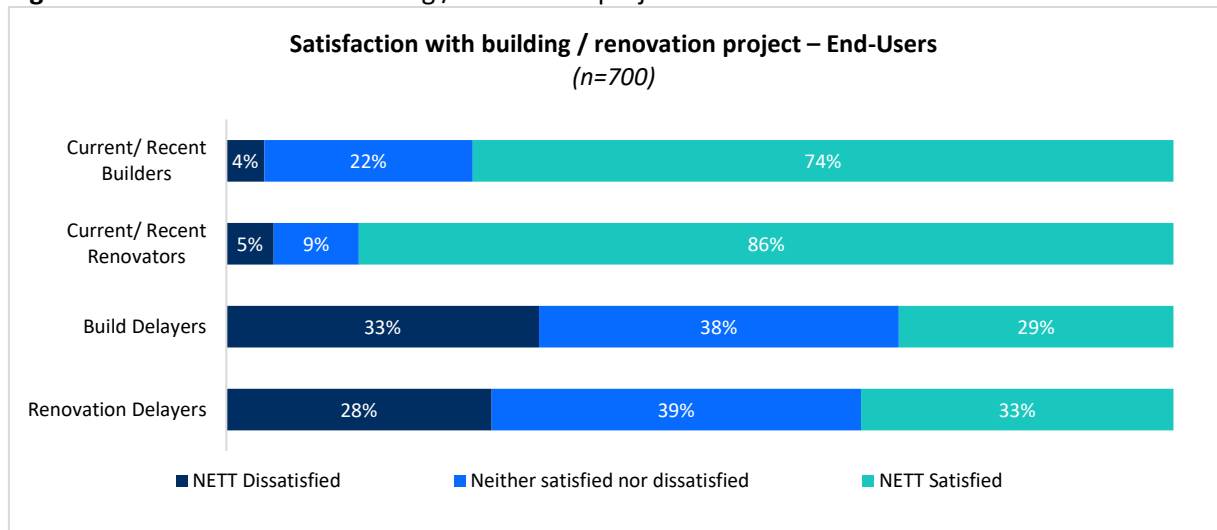


End-Users' satisfaction with building / renovation projects

(Question HC7/HD7 asked of Current / Recent Builders / Renovators and Build / Renovation Delayers)

The clear majority of End-Users who had been able to complete their recent renovation or build were satisfied with their project, and understandably, those who had to delay their project were significantly more dissatisfied.

Figure 42: Satisfaction with building / renovation project – End-Users



Section 6: Business Impact

Summary

Rising business costs was a key concern for businesses, therefore, it was not surprising that Businesses wanted advice on how to reduce business costs, price jobs correctly, and adopt new technology. Advice on how to manage mental well-being (due to the stress caused by the COVID-19 pandemic) was also sought by Businesses.

Key Qualitative Results

Businesses and **Workers** were reporting a much higher degree of work complexity and time investment than what is normally required, due mainly to reduced product and staff availability and product delivery reliability. This meant that all aspects of project management had become harder, reducing cost effectiveness and extending timeframes. Hence, business profitability was down even though revenue was up. While the industry was certainly busy, 'busyness' was undermined by reduced margins and unrealised potential. Hence, many felt they were working harder but for less gain. Many felt that both revenue and margins could improve if they had more staff, but these were hard to find. The sole trader interviewed was less affected, having few overheads and a fixed amount of work to do.

Key Quantitative Results

In reflection of the results discussed earlier, **Businesses** would like more help / advice in the areas where they reported the most management problems, which mainly related to maintaining profit margins, coping with understaffing, and the stress of managing building and construction businesses in the current environment:

- reducing business costs (28 per cent)
- managing mental well-being (25 per cent)
- pricing jobs correctly (25 per cent)
- adopting new technology (23 per cent)
- training employees (22 per cent)
- managing employee performance (22 per cent).

The desire for new technology reflected the increased complexities of project management arising from the problems cited so far in this report. Product delays, rising prices and staff shortages could be making business management more difficult.

Looking forward over the next two years, the issues cited as having the greatest negative impact on **Businesses** were:

- freight and product costs (31 and 29 per cent respectively)
- being able to order and have the preferred products delivered on time (22 and 29 per cent respectively)
- ease of finding suitable staff in New Zealand (22 per cent).

Additional Detail

Detailed, annotated tables showing differences amongst sub-samples (where statistically-significant differences exist) for this section can be found in Appendix C, tables 55-57.

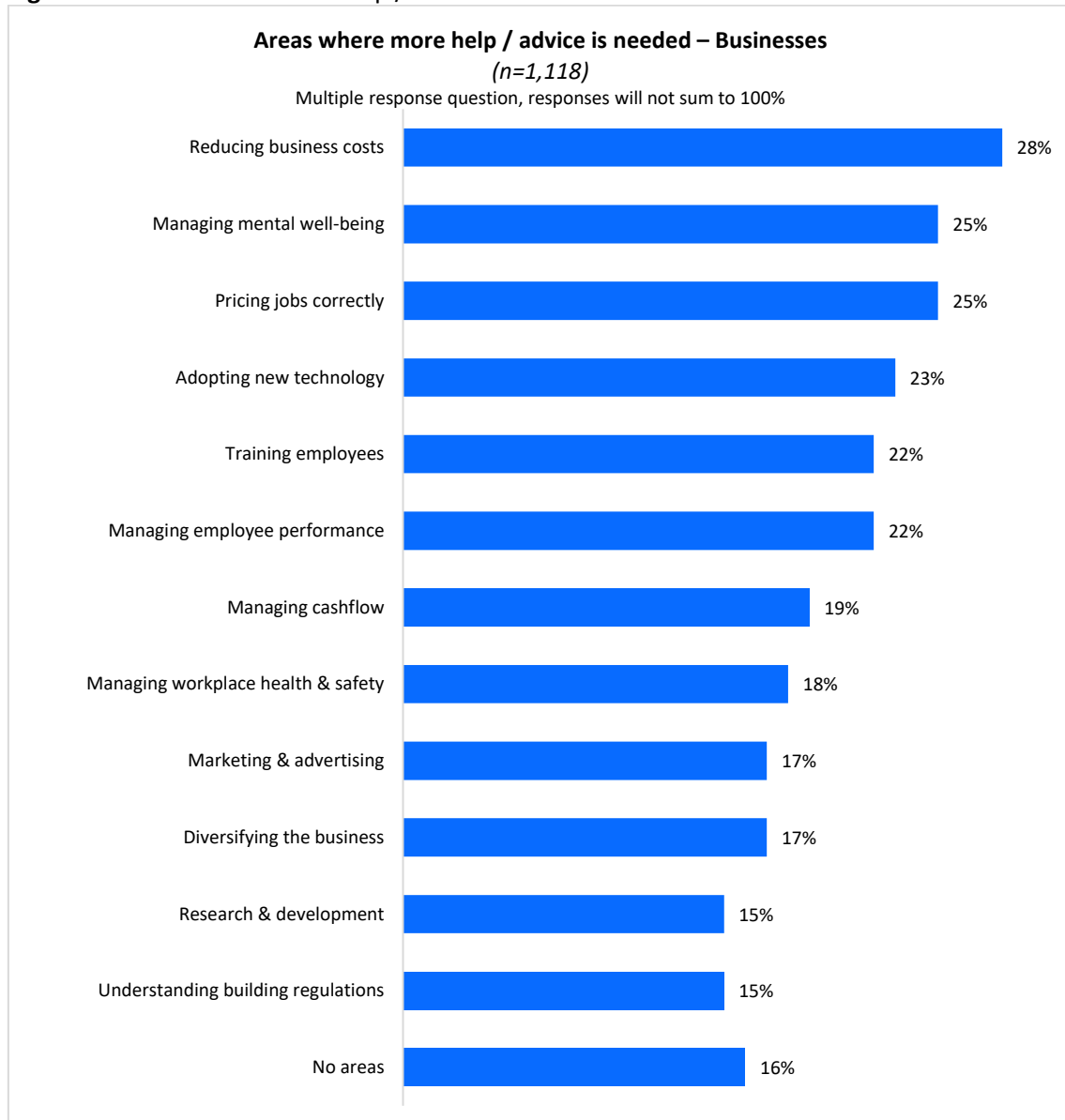
Areas where Businesses need more help / advice

(Question QD5 asked of Businesses)

“Everyone has a backup office at home. There are no excuses for being unavailable now!”
– Qualitative Business respondent

Businesses would like more help / advice in the areas of *reducing business costs* (28 per cent), *managing mental well-being* (25 per cent), *pricing jobs correctly* (25 per cent) and *adopting new technology* (23 per cent). The areas Businesses expressed least interest in help / advice with were *research and development* (15 per cent) and *understanding building regulations* (15 per cent).

Figure 43: Areas where more help / advice is needed – Businesses



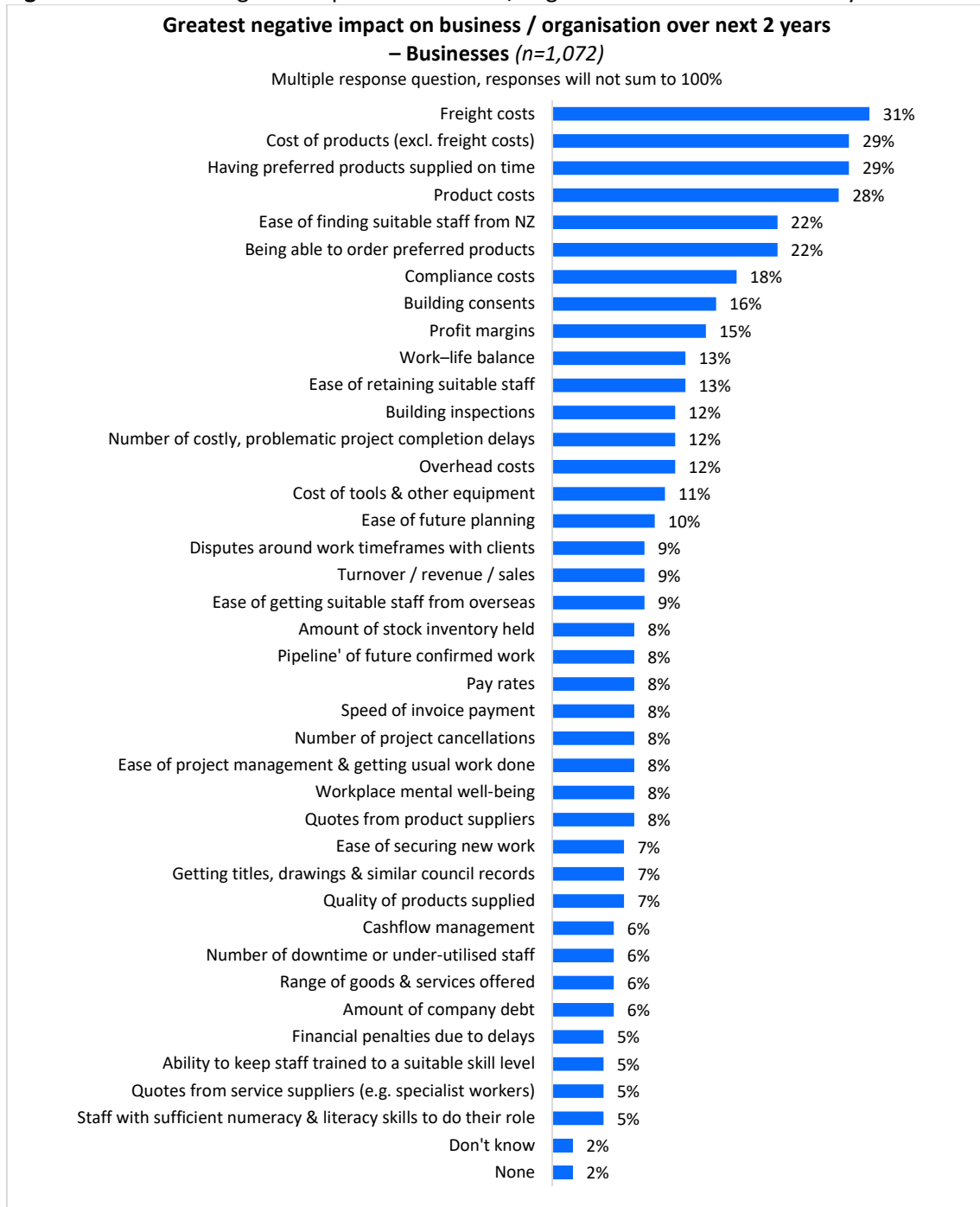
Greatest negative impact on business / organisation over next two years – Businesses

(Question QZ1 asked of Businesses indicating at least one of the factors shown was likely to get worse)

“Our customers are all opening accounts with our competitors to try and source stock, so we can expect to lose a few in the long term.” – Qualitative Business respondent

Freight and product costs and having preferred products supplied on time were anticipated to have the greatest negative impact on Businesses over the next two years.

Figure 44: Greatest negative impact on business / organisation over the next two years – Businesses



Note: Responses less than 5% not shown in the graph.

Section 7: Personal Impact

Summary

The majority of Businesses and Workers reported having supportive, safe working environments despite the challenges they were facing.

Key Qualitative Results

Businesses were reporting much higher degrees of stress amongst senior managers, business owners and owner-operators, arising from the increased complexities of running their operations.

Many felt it was hard to complain when so many have lost their jobs, e.g., in tourism. However, the added complications were causing stress or anxiety simply through things taking longer, being more complicated and less dependable. Other factors causing stress included: uncertainty, overtime becoming more common, and (for Businesses) staff poaching.

End-Users were generally resigned to the 'new normal', with most appreciating the attempts made to manage the COVID-19 virus in New Zealand, and trying to proceed as normally as possible, albeit with an ever-present concern about 'what might happen in the future'. Many reported re-evaluating their home environment, adapting for more time at home with children and / or working.

However, the impacts of the aforementioned challenges facing Business and End-Users were reportedly creating additional stress, with issues such difficulties liaising with landlords when move-in dates kept changing; frustration at the lack of progress in their building project and living with unfinished projects; nervousness about temporary fixes that might fail and not be able to be fixed; increases in businesses wanting money paid upfront. Associated problems cited included the exodus out of overpriced cities; stress at being unable to fulfil roles, e.g., being a family caregiver; and concern that prices would stay high, and that the high cost of living in New Zealand would get worse.

Key Quantitative Results

Workers and **Businesses** were generally happy with their workplace experiences, with around two thirds agreeing with each of the positive descriptors about their workplace. Generally, these respondents were six times more likely to agree than disagree with such statements; 74 per cent of Workers and 81 per cent of Businesses were satisfied with their overall work experience.

The best-rated aspects were that staff felt:

- physically safe at work (71 and 64 per cent of Businesses and Workers, respectively)
- that they were able to care for their own well-being at work (64 and 65 per cent of Businesses and Workers, respectively)
- emotionally safe at work (65 and 63 per cent of Businesses and Workers, respectively).

Businesses generally tended to have a better opinion of the conditions at their workplace than Workers, except for *feeling physically safe*, where there was a 7-point difference.

The majority of **End-Users** reported no change in their well-being. However, almost one-third were concerned about their *financial situation* (29 per cent) and *mental well-being* (27 per cent). Of note

was that End-Users whose building plans had been delayed due to the COVID-19 pandemic were significantly more likely to report that their well-being had worsened.

Additional Detail

Detailed, annotated tables showing differences amongst sub-samples (where statistically-significant differences exist) for this section can be found in Appendix C, tables 58-66.

Impressions of place of work

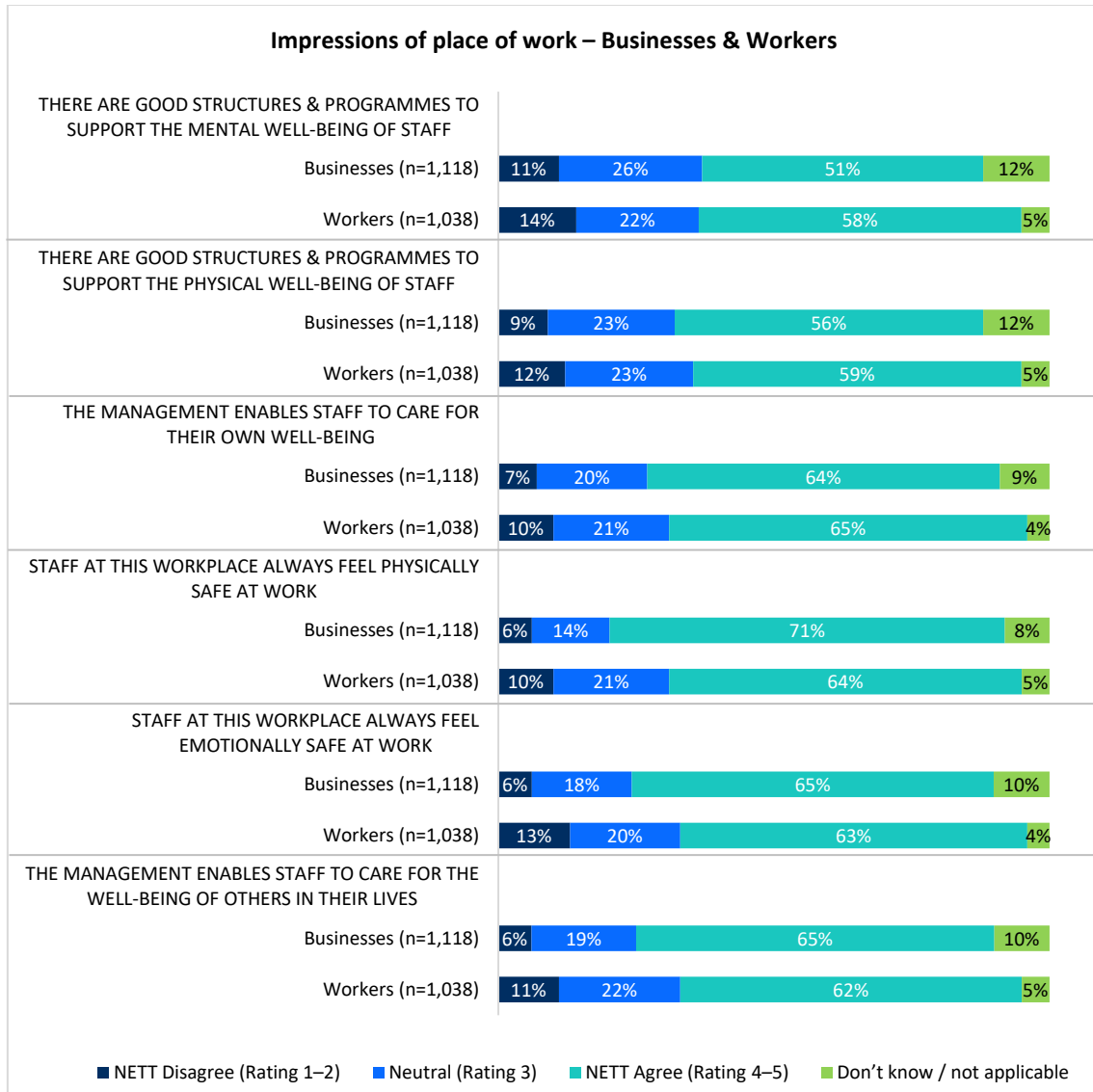
(Question QD6/WD6 asked of Businesses and Workers)

“During lockdown we were sent care-packs and the boss started up daily video chats” – Qualitative Worker respondent

Businesses were more likely than Workers to agree with five of the six statements about the availability of support structures in their workplace. This might reflect the differences in workplace experience between senior management and other workers.

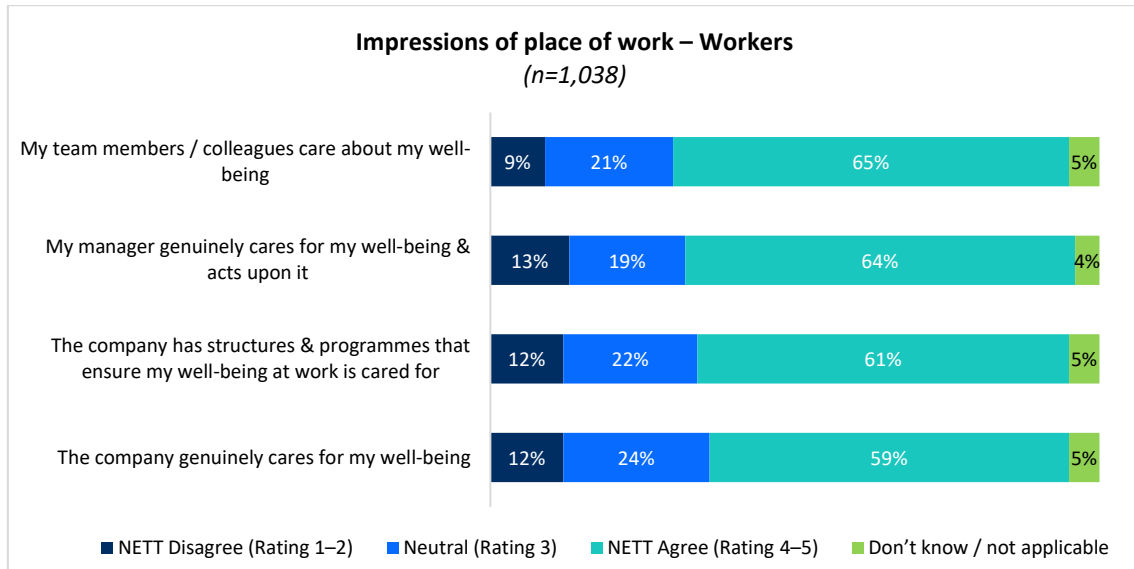
Workers (58 per cent) were more likely than Businesses (51 per cent) to report that *there are good structures and programmes to support the mental well-being of staff*. Around 71 per cent of Businesses compared with 64 per cent of Workers believed staff at their workplace *always feel physically safe at work*, whilst a similar proportion of Businesses (64 per cent) and Workers (65 per cent) considered that *management enables staff to care for their own well-being*.

Figure 45: Impressions of place of work – Businesses and Workers



Two-thirds of Workers believed that *my team members / colleagues care about my well-being* (65 per cent) and that their *manager genuinely cares for their well-being and acts upon it* (64 per cent). Only 12 per cent of Workers disagreed that *the company genuinely cares for their well-being*.

Figure 46: Impressions of place of work – Workers



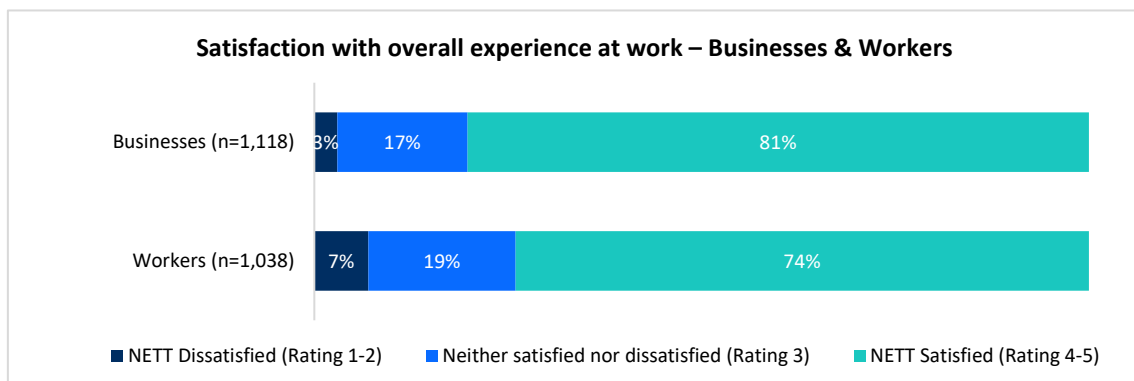
Satisfaction with overall experience at work

(Question QD7/WD7 asked of Businesses and Workers)

“Since COVID the building business has become fast-paced and a stressful environment to work. Materials have been made harder to come by. But more people are wanting to build.”
– Qualitative Worker respondent

In terms of *satisfaction with the overall experience at work*, Business respondents (81 per cent) were more likely to be satisfied than Workers (74 per cent), while fewer Businesses were dissatisfied (3 per cent) than Workers (7 per cent).

Figure 47: Satisfaction with overall experience at work – Businesses and Workers



Negative impact on building / renovation project – End-Users

(Question HC8/HD8/HE8 asked of End-Users who indicated at least one of the factors listed was expected to get worse)

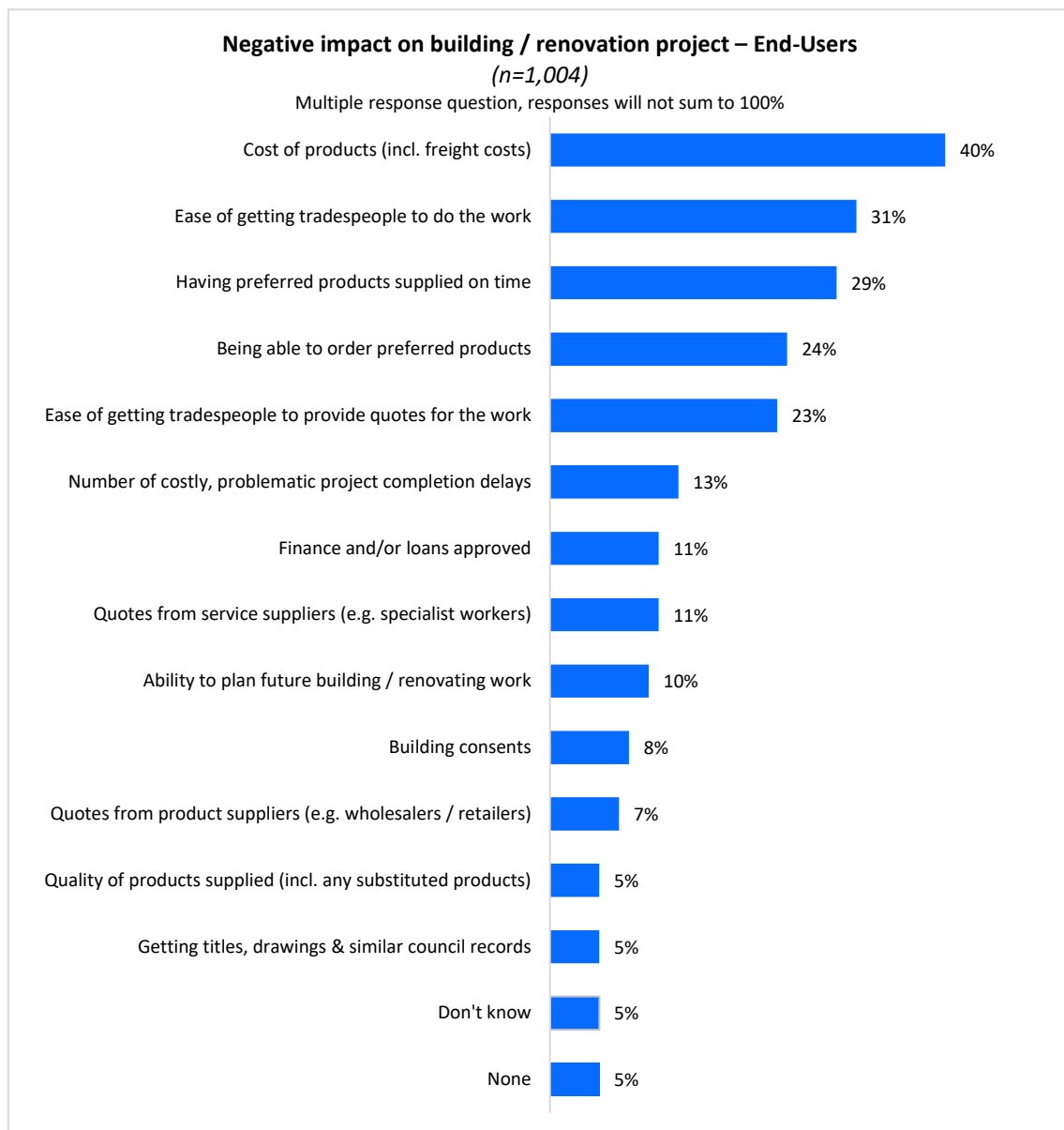
Cost of products (including freight costs) (40 per cent) was the attribute with the highest negative impact for End-Users, followed by ease of getting tradespeople to do the work (31 per cent) and having preferred products supplied on time (29 per cent).

“By the time we’d chosen the wallpaper, they said when they went to order it the quotes were 2 months old and the shipping costs cost more to get it in time for the build – we just had to fork out and pay the extra to guarantee delivery on time.” – Qualitative End-User respondent

“Granite benchtops – 1-2 months wait. So everything on the project had to wait.” – Qualitative End-User respondent

“They couldn’t get it into the country... whiteware, we also had difficulty sourcing test pot samples.” – Qualitative End-User respondent

Figure 48: Negative impact on building / renovation project – End-Users



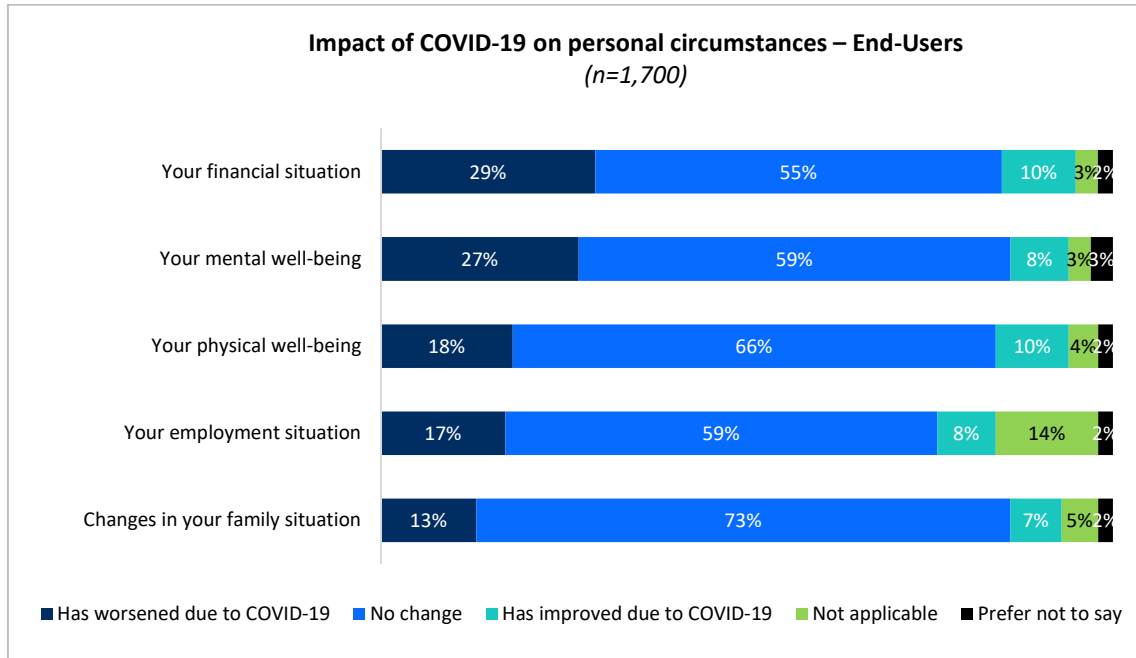
Note: Responses less than 5% not shown in the graph.

Impact of the COVID-19 pandemic on personal circumstances – End-Users

(Question HC9/HD9/HE9 asked of End-Users)

Changes in family situation remained stable for most End-Users (73 per cent), whilst their financial situation (29 per cent) and mental well-being (27 per cent) worsened due to the COVID-19 pandemic. Financial situation and physical well-being improved for 10 per cent of End-Users.

Figure 49: Impact of COVID-19 on personal circumstances – End-Users



Section 8: Future Expectations

Summary

Businesses generally believed that the next two years would see little-to-no change in most aspects of their business operations and were, on balance, more optimistic than pessimistic. Workers were even more positive in their outlook, particularly in relation to their career prospects. End-Users had the most pessimistic outlook with many anticipating increased product costs.

Key Qualitative Results

Businesses were not expecting the problems cited to get substantially better in the next few years, and many were finding it difficult to plan due to the unpredictable nature of the COVID-19 pandemic. Despite the ‘busyness’ of the sector, some believed that smaller businesses were likely to struggle or fail, as the product supply problems could lead to an inability to meet deadlines and cashflow requirements. Larger businesses, with deeper reserves and a better ability to stockpile products, would be in a better position to survive.

Most found it difficult to identify simple solutions, acknowledging how difficult it is to solve all these issues. Suggestions for improvements included making it easier to import staff (e.g. assigning required staff priority places in Managed Isolation Quarantine); helping with product supply, and perhaps by easing the way for the sector to increase local production and/or foreign investment.

End-Users felt the need for more tradespeople, council staff, products, certainty, and building efficiencies. These End-Users recognised that the problems experienced were not restricted to the building sector. Few, if any, were ‘blaming’ the building sector for these problems – the world had changed. However, there was underlying concern for the ‘what-ifs’ that was tempering some activity, and a lot of frustration and personal stress.

Key Quantitative Results

Around half of **Businesses** generally believed that the next two years would see little-to-no change in most aspects of their business operations. On balance, Businesses were generally more optimistic than pessimistic.

The business management aspects that were expected to significantly get better in the next two years were the:

- financial viability of the business (27 per cent)
- overall financial performance of their business (27 per cent)
- ease and efficiency of running their business (24 per cent).

Conversely, the aspects expected to get significantly worse were:

- overall cost of products (39 per cent)
- ease and timeliness of working with councils (25 per cent)
- ability to get preferred products when required (24 per cent).

Overall, Businesses were expecting product prices and availability to keep worsening, finance to tighten up and council performance to continue to deteriorate; and that some of these challenges could be offset by improved business efficiency, staff retention and financial performance.

Compared to Businesses, **Workers** were even more positive, with over a third expecting the next two years to bring improvements in pay, job security, work–life balance and overall working conditions. These perceptions could be assumed to arise from an expected continuation of a worker shortage, enabling Workers to demand better conditions. Some Workers were also looking to improve their skill set, with around one-third anticipating promotions and getting extra qualifications.

However, there were also indications of potential issues, with some Workers planning to leave the New Zealand building and construction sector over the next five years:

- 21 per cent planning to leave New Zealand
- 20 per cent planning to leave the sector
- 15 per cent planning to pause work for personal reasons such as taking on extra study
- 14 per cent planning to pause work for personal reasons.

Although apprenticeships in the sector increased since the COVID-19 pandemic, there might be a decrease in experienced Workers over the next few years.

End-Users had the most pessimistic outlook, whereby, the proportion of those expecting things to worsen in the next two years were generally higher than those expecting improvements. Specifically, they were anticipating the following to worsen:

- overall cost of products (70 per cent)
- ability to get preferred products when required (56 per cent)
- availability of suitable tradespeople (50 per cent).

Additional Detail

Detailed, annotated tables showing differences amongst sub-samples (where statistically-significant differences exist) for this section can be found in Appendix C, tables 67-80.

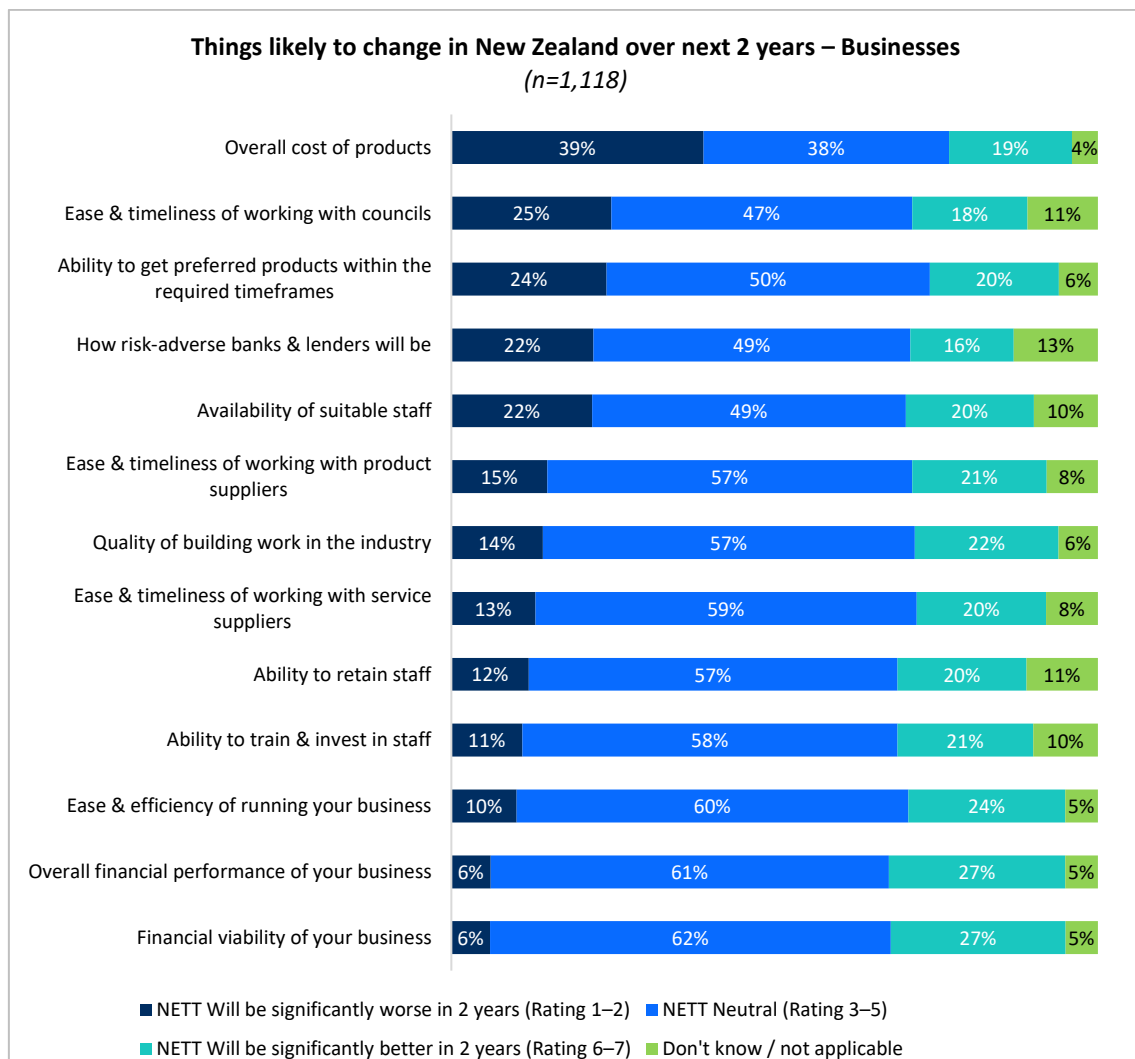
Things likely to change in New Zealand over the next two years – Businesses

(Question QF1 asked of Businesses)

“The changes the government discuss like changing the Resource Management Act or freeing up land won’t make any difference without materials and people.” – Qualitative Business respondent

Financial viability (27 per cent) and overall financial performance (27 per cent) were most commonly reported by Businesses as factors likely to improve in New Zealand over the next two years, whilst overall cost of products (39 per cent) and ease and timeliness of working with councils (25 per cent) were most commonly anticipated to worsen.

Figure 50: Things likely to change in New Zealand over the next two years – Businesses

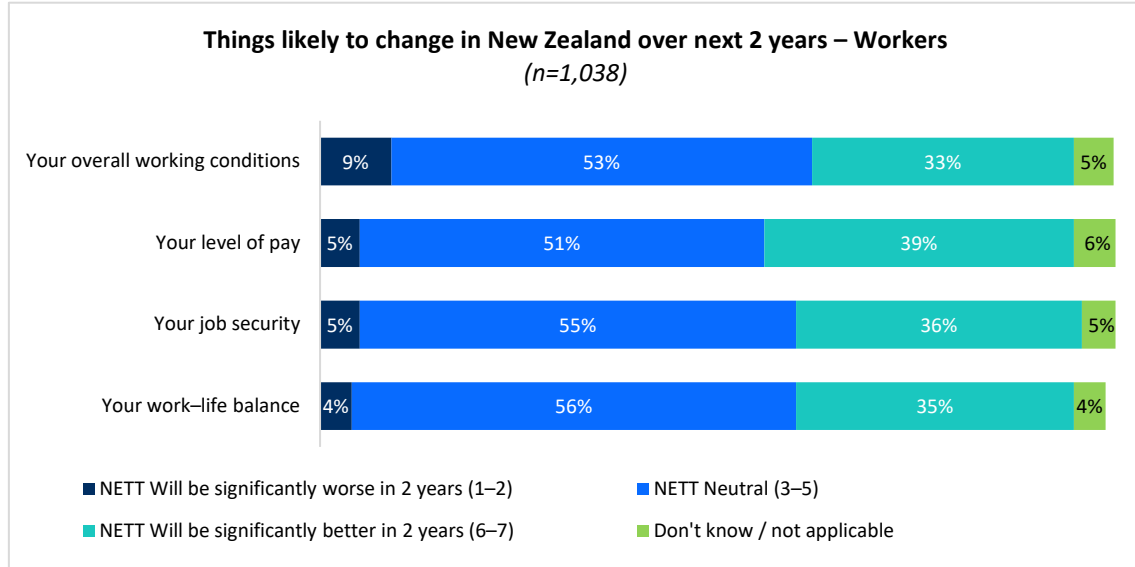


Things likely to change in New Zealand over the next two years – Workers

(Question WF1 asked of Workers)

Level of pay (39 per cent) and job security (36 per cent) were the factors that Workers ranked as the most likely to improve over the next two years. A small minority of Workers (9 per cent) believed that their overall working conditions over the next two years would get significantly worse.

Figure 51: Things likely to change in New Zealand over the next two years – Workers

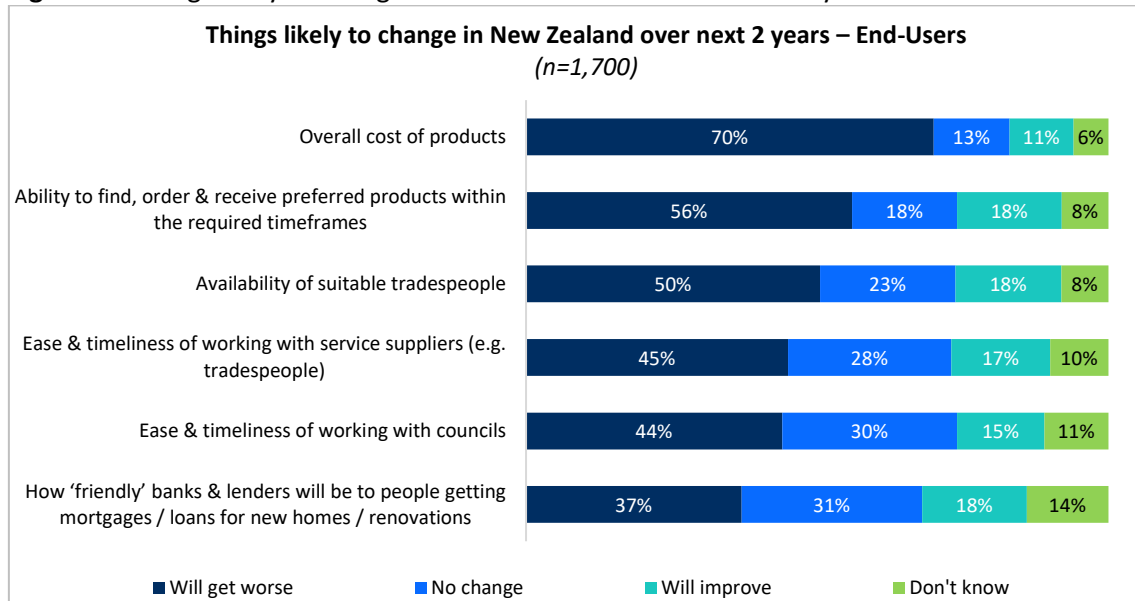


Things likely to change in New Zealand over the next two years – End-Users

(Question HF1 asked of End-Users)

Overall cost of products (70 per cent), ability to find, order and receive preferred products within the required timeframes (56 per cent) and availability of suitable tradespeople (50 per cent) were the main aspects End-Users believed would get worse over the next two years.

Figure 52: Things likely to change in New Zealand over the next two years – End-Users



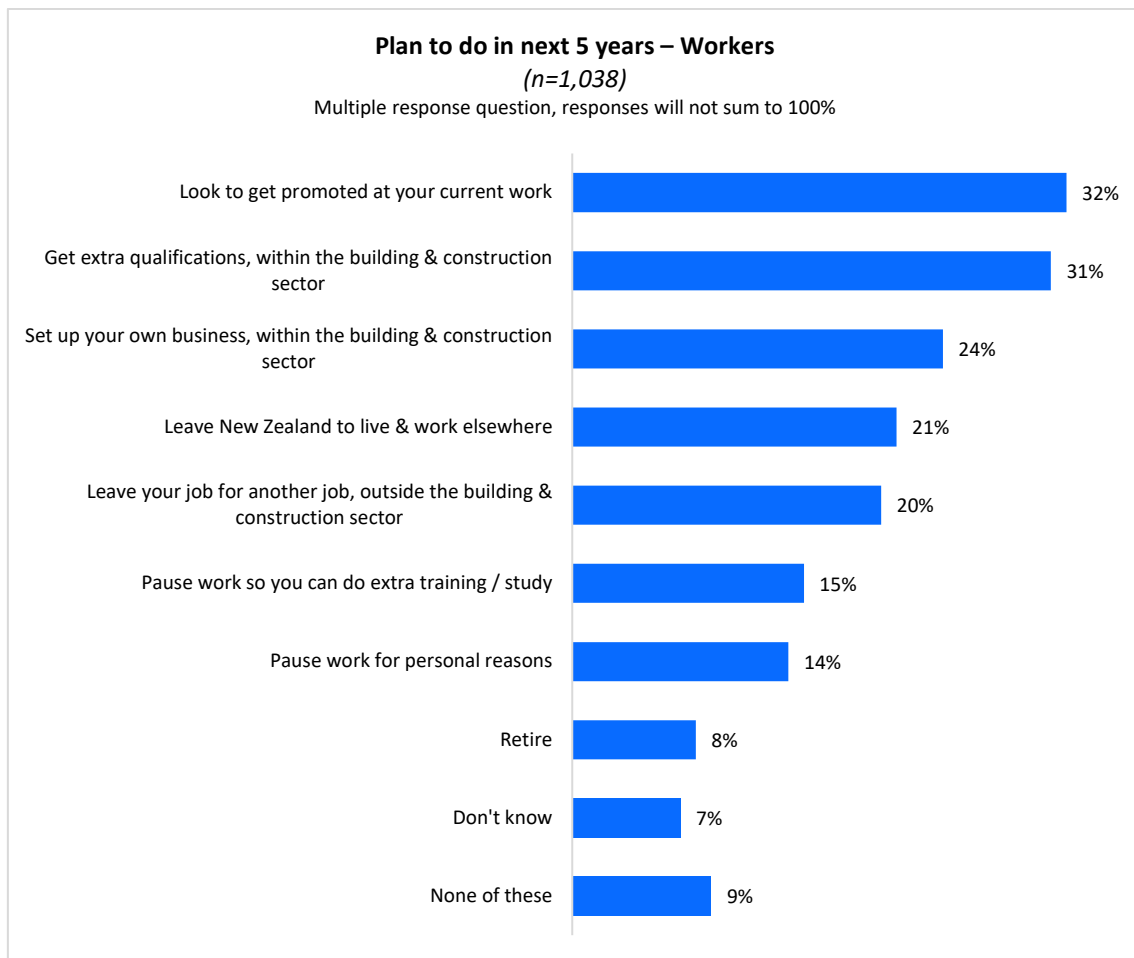
Workers' plans in the next five years

(Question WF2 asked of Workers)

In the next five years, around one-third of Workers were looking to *get promoted at their current work* (32 per cent) and *get extra qualifications within the building and construction sector* (31 per cent), while a quarter (24 per cent) planned to *set up their own business within the sector*.

Approximately two in ten planned to leave New Zealand or work outside the sector.

Figure 53: Plan to do in the next five years – Workers

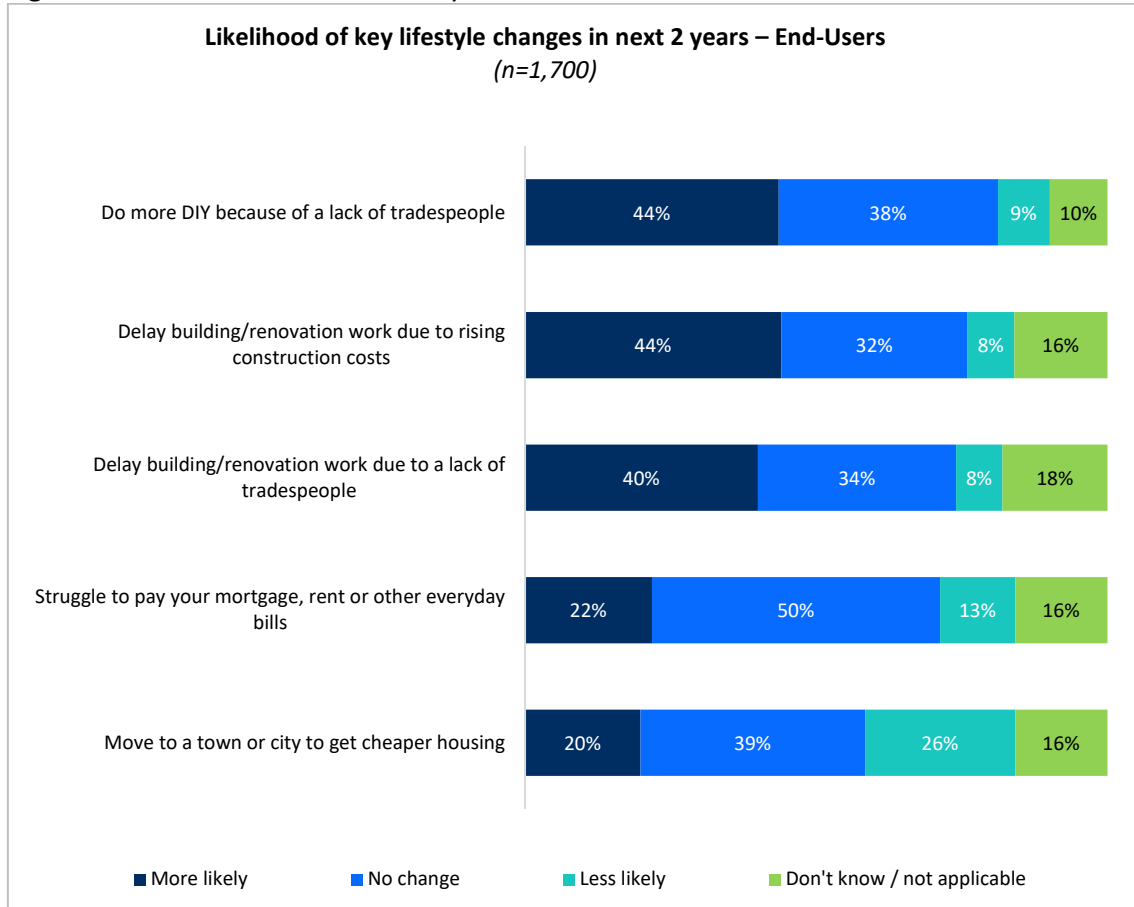


End-Users' plans in the next two years

(Question HZ1 asked of End-Users)

In the next two years, 44 per cent of End-Users expected to *do more DIY because of a lack of tradespeople*, and the same proportion anticipated *delaying building / renovation work due to rising construction costs*. Almost as many, 40 percent, said they would probably *delay building / renovation work due to a lack of tradespeople*.

Figure 54: Plan to do in the next two years – End Users



Things building sector can best be helped with to overcome the challenges presented by COVID-19

(Questions QG12/HZ17/WG17 asked of Businesses, Workers and End-Users)

When asked how the building sector can best be supported to overcome the challenges presented by the COVID-19 pandemic, many cited **addressing the labour shortage**:

“Encouraging our young that a Trade is a great Career opportunity!” – Qualitative Business respondent

“Free up Managed Isolation Quarantine space for equipment technicians, installation engineers and commissioning engineers, so that hi tech equipment coming from offshore can be installed and commissioned.” – Qualitative Worker respondent

“Continuation of apprenticeship support for employers. I will take another apprentice on at the end of 2022 if the government continues with the 2-year support programme that is currently in place but is planned to end in August 2022. If the program ends in 2022, I will NOT train another apprentice.” – Qualitative Business respondent

“Encourage more people into the trades. The cost of building / renovating in New Zealand is totally out of proportion with the world or the standard of living – I think because of multiple middlemen when sourcing products. It would be good to get this addressed.” – Qualitative End-User respondent

“As a person who has spent 50 years working in the engineering and building services trades, it has always been difficult to get young people to take up a ‘trade’. This could be helped by having ‘trade’ nights at high schools.” – Qualitative End-User respondent

“Due to COVID-19 my year 2 block course for Electrical Engineering (Trade) Level 4 V2 was postponed till this year. I would have been a year 3 student, however, because the block course wasn't completed, I had to stay back a year to level 2.” – Qualitative Worker respondent

Some cited the need to speed up **paperwork** such as consents and inspections:

“We struggle with council inspections taking 2-3 weeks and immigrants getting residence... coming to rural Otago, then once [the] visa comes though [they] shift to the cities and [we are] back to square one.” – Qualitative Business respondent

“Please review the Resource Management Act! Also councils when building permits are submitted and then they wait until the last possible day to say that things need to be changed or they want more information – and keep doing this. Our new home and associated subdivision took 6 years for Resource Consent and over 6 months for building consent. No wonder there's a housing crisis!” – Qualitative End-User respondent

“Getting straight answers from the local council about what you can or cannot do. They refuse to answer verbal questions or reply to email questions on simple issues, e.g., can you use a dense / solid insulation in walls like they can in Christchurch.” – Qualitative End-User respondent

Many cited problems with **product supply and costs**:

“Basically, the building industry is booming, mainly from the house crisis but also from during lockdown people wanted new houses or to change things in their current [home] so the work amounts have gone up.” – Qualitative Worker respondent

“The housing crisis is being exacerbated by rising costs of materials and products, due in part [to] freight costs. MBIE needs to work harder on incentivising construction innovation using locally sourced and manufactured building materials and products – the current regulatory environment stifles innovation whilst simultaneously contributing to rising costs through excessive compliance demands.” – Qualitative Business respondent

“Timber supply to the New Zealand building industry should be a major priority over export, with the NZ Government giving more support to NZ forestry and timber mills followed by the ridiculous rate of which timber prices are rising. Feed your children before feeding the neighbourhood.” – Qualitative End-User respondent

“The construction sector is currently being crippled by issues surrounding the timely and cost-effective supply of building materials. If this continues, there will be wholesale failings across the sector in delivering construction projects on time and in budget. If suppliers continue to support only the major players in the industry, this will have a major impact on the remainder of the smaller businesses around NZ. This will negatively impact the local regions and players who don't have the same buying power. The ongoing economic rebound post-COVID 2020 is largely reliant on a burgeoning construction sector. If these supply issues are not remedied, there is a danger that construction projects will be cancelled or delayed due to difficulties in product supply or increased costs.

A healthy construction sector requires a healthy supply chain. Exporters of products which are in short supply in NZ but are still being shipped overseas need to be given an incentive to keep their products in the NZ market. There also needs to be investment in developing an industry which is self-sufficient. If they are to invest, NZ investors need to be assured that, once the global market opens back up, that products aren't going to be sourced from overseas markets thereby de-valuing their investments, e.g. producing products in NZ which can then be imported for cheaper.

If the current trend continues, the building industry is heading for certain disaster in the very near future. Something that is not entirely a result of COVID-19 but it has certainly not helped is the incompetency of local councils and the incessant red tape and paper hurdles that hold up building projects. The 'must tick the box' mentality with no practical thought or application when processing consents and also onsite inspections is a frustrating episode that must be played out across the country. There is no easy answer here with local consenting authorities requiring an overhaul from top to bottom.” – Qualitative Business respondent

APPENDICES

Appendix A: Detailed Methodology

Appendix B: Notes on the Reporting

Appendix C: Quantitative Sub-Sample Analysis

Appendix D: Qualitative Discussion Guides

Appendix E: Quantitative Questionnaires

Appendix F: Key Dates: COVID-19 Alert Levels and the timeline of this research

Appendix A: Detailed Methodology

Stage 1: Qualitative exploration

The **objective** of Stage One was to conduct a ‘sense-check’ of the issues at play, to ensure a better quantitative survey was subsequently conducted.

By qualitatively exploring the issues with a small but varied range of actors in the building system, the researchers were able to proceed to the quantitative phase with greater surety about asking the ‘right questions, in the right manner’. This involved:

- exploring what we think could be the issues of importance, and learning what the market thinks
- checking the language being used
- identifying previously unconsidered areas for possible examination
- checking our preconceptions and assumptions
- enabling better interpretation of the quantitative results
- adding a human flavour to the data.

A mix of **methodologies** was used, to suit the people being researched:

- **12 Construction-Sector Workers** from a wide range of sectors throughout New Zealand were interviewed via formal screening questionnaires and interviewed via 1-hour one-on-one interviews via MS Teams or Zoom between 30 March and 22 April 2021.

The workers were from businesses with 1 to 500+ staff. The roles of the interviewed workers covered the following:

- Engineers
 - Tradespeople
 - Mechanical installers and consultants
 - Sole trader
 - Project managers
 - Design engineers
 - Sales managers
 - Consultants
 - Manufacturers
 - Civil, business and residential sectors
 - Range of business roles:
 - Business managers
 - Trade pricer
- **10 Residential End-Users** from throughout New Zealand were interviewed via two 90–120-minute MS Teams focus group discussions held on April 8 and 9 2021.

For both methodologies, **discussion guides** (Appendix D) were used to guide but not control the discussion flow. These guides were structured around MBIE’s ‘4Ps framework’ (performance, people, processes and products).

The End-User respondents included: current home builders / renovators, delayed builders / renovators and renovation / building planners. These encompassed a wide range of people from

across New Zealand, such as a solo parent, lecturer, retiree, hospital worker, engineer, lawyer, public servant and a university worker.

The **results** of this stage were discussed with the MBIE project team and utilised in the development of the questionnaires used for Stage 2.

Stage 2: Quantitative survey of the actors in the NZ building system

Survey objective

The objective of Stage 2 was to quantify the current and possible future impacts of the COVID-19 pandemic on the building system across the three actor groups (Businesses, Workers and End-Users). This report is an aggregate of the research participants' behaviours, perceptions and feedback. It is important to note that it is not necessarily representative of the views of all the building system in New Zealand, because self-selection bias could influence results even if the industry profile matches the population. However, this report offers insight into a range of perspectives on issues facing the building and construction industry during the COVID-19 pandemic.

Surveying method and timing

The surveying method was online, via a core questionnaire adjusted to suit each distinct sample group. The questionnaire took an average of 11 minutes to complete.

Quantitative fieldwork was conducted between 3 June and 9 July 2021.

Sample sources and channels

Multiple sample sources and both online and hard-copy postal channels were used to maximise response rates, cost-effectiveness, sample diversity and sample robustness for each sample group. The sample and fieldwork details are outlined below.

Sample descriptions

The **Business** sample was made up of self-identified senior managers and business owners in a wide range of building and construction business entities.

The **Worker** sample was made up of employees in a wide range of building and construction business entities, who are not senior managers or business owners.

The **End-Users'** sample was structured as follows:

- Home owners: Those who own their homes (in freehold, leasehold, unit title and cross-lease titles)
- Builder/Renovators: Those who built / renovated in 2020
- Build/Renovation Cancellers/Delayers: Those who planned to build / renovate in 2020 but were unable to due to COVID-19
- Build/Renovation Planners: Those who are planning to build / renovate in the next two years (2021 and 2022).

Questionnaires

Using the qualitative research findings, available literature, and the 4Ps concept, three different questionnaire sets were prepared for the three sample groups. The questionnaires followed the same structure and contained the same themes, however, the wording of various questions were adjusted for each group/sub-group. The questionnaires were then scripted for the online survey. A copy of all versions of the questionnaire is available in **Appendix E**.

Sample sources

The sample sources are outlined below. To increase participation rates, participants who were not accessed via the opt-in research panels managed by Ipsos and its research partners, were offered a chance to go into a prize draw. This was valued at \$1,000 and was made up of 1 x \$500 and 5 x \$100 Prezzy cards.

- The online opt-in **research panels** managed by Ipsos and selected Ipsos partners. Although these were primarily used to survey End-Users, any respondents found to be eligible for the Business or Worker samples were allocated to the appropriate Business or Worker questionnaires.
 - 1,700² End-Users were surveyed via this channel
 - 527 Businesses were surveyed via this channel.
 - 899 Workers were surveyed via this channel.
- The private **Facebook group 'NZ Tradie Community'** allowed Ipsos to post two survey invitations and these yielded one valid response.
- **The Martins NZ** building sector database was the main sample source. Martins is one of the largest suppliers of business data in New Zealand and it is Data Warranted with the NZ Marketing Association. More details on Martins can be found at www.martins.co.nz and the Data Warranted accreditation here: <https://marketing.org.nz/data-warranty-register>. More details on how the Martins database was used are in the table overleaf.

Table I: Email tracking data; Martins databases.

Email invitations sent	11,107
Email reminders sent	10,236
Email bounce-backs	653
Hard-copy posted reminders sent to email non-responders	8,926
Hard-copy invitations sent to records that did not have email addresses	4,350
Hard-copy posted reminders sent to non-responders to hard-copy invitations	4,342
Hard-copy 'return to senders'	595
Email open rate (per delivered email)	29% (n=3,056)
Questionnaire completion rate as proportion of estimated total eligible (email & hard-copy recipients minus bounce-backs & return-to-senders)	3% (n=505)

² This includes an additional 24 respondents that were gained via a generic link that was shared by panel respondents.

- **BCITO database:** BCITO is the Building and Construction Industry Training Organisation, one of New Zealand’s key managers of apprenticeships and related professional training in the building and construction industry. As this is a non-commercial government research project being conducted for the good of the wider industry, BCITO agreed to send survey links to its database. Two questions from BCTIO were included in the survey.

BCITO sent a one-off email with survey links to the n=8,015 building and construction Businesses and current and recent Apprentices on its database, and BCITO later posted a survey invitation to its Facebook page.

Table II: Email tracking data; BCITO database.

Emails sent	Email open rate	Survey link click rate	Questionnaire completion rate as proportion of survey starters	Questionnaire completion rate as proportion of email openers	Questionnaire completion rate as proportion of estimated total eligible
8,015	32% (n=2,533)	8% (n=211)	52% (n=109)	5% (n=109)	1% (n=109)

- **Skills database:** The Skills Consulting Group is a building and construction industry training organisation, one of New Zealand’s key managers of apprenticeships and related professional training in the building and construction industry. As this is a non-commercial government research project being conducted for the good of the wider industry, Skills agreed to send survey links to its database. Two questions from Skills were included in the survey.
 - Skills sent a one-off email with survey links to the n=13,472 building and construction Businesses and current and recent Apprentices on its database.
 - 48% opened the emails (n=6,459).
 - 8% clicked on the survey link (n=518).

Table III: Email tracking data; Skills database.

Emails sent	Email open rate	Survey link click rate	Questionnaire completion rate as proportion of survey starters	Questionnaire completion rate as proportion of email openers	Questionnaire completion rate as proportion of estimated total eligible
13,472	48% (n=6,459)	8% (n=518)	27% (n=139)	2% (n=139)	1% (n=139)

Overall sample summary

Overall, the sample comprised the following entities:

Table IV: Sample sizes of main actor groups.

Overall Sample	n=	Maximum Margin of Error
Workers within the building system	1,038	2.96%
Businesses within the building system	1,118	2.84%
End-Users / Homeowners	1,700	2.27%
Total	3,856	1.41%

Table V: Sample sizes gained by each sample source.

Sample Sources	n=
Opt-in online market research panels	3,102
Martins database	505
Skills NZ	139
BCITO	109
Facebook	1

Table VI: Sample sizes of Business sample respondent roles.

Business Sample (respondent role)	n=	Maximum Margin of Error
Business owners	663	3.81%
Senior managers	356	5.19%
Independent contractors	99	9.85%
Total	1,118	2.93%

Table VII: Sample sizes of Business group; sector categories

Business Sample (sector)	n=	Maximum Margin of Error
Construction	518	4.03%
Specifier / Architecture / Engineer / Surveyor etc	245	6.26%
Manufacturing	93	10.16%
Project management	90	10.16%
Support services	85	10.93%
Retail trade	39	15.69%
Wholesale trade	24	20.00%
Interior design	15	25.30%
Other	10	30.99%
Total (includes one respondent categorised in both Construction and Project Management)	1,119	2.93%

Table VIII: Sample sizes of Worker group; sector categories

Business Sample (sector)	n=	Maximum Margin of Error
Construction	398	4.91%
Specifier / Architecture / Engineer / Surveyor etc	176	7.39%
Support services	125	8.77%
Project management	107	9.47%
Retail trade	80	10.96%
Manufacturing	79	10.96%
Wholesale trade	31	17.60%
Interior design	17	25.30%
Other	25	19.6%
Total	1038	3.04%

Table IX: Sample sizes of Business group; employee numbers

Business Sample (Number of employees)	n=	Maximum Margin of Error
0	401	4.89%
1-5	560	4.14%
6-9	216	6.67%
10-19	269	5.97%
20-49	250	6.19%
50-99	156	7.84%
100+	105	9,56%
Total	n/a	n/a

Table X: Sample sizes of End-Users group; detailed building project categories

End-Users Sample (detailed)	n=	Maximum Margin of Error
Current / recent builders	115	9.11%
Current / recent renovators	385	4.94%
Build delayers	90	10.31%
Renovation delayers	110	9.32%
Build planners	165	7.59%
Renovation planners	335	5.31%
Homeowners (not fitting into any of the above categories)	500	4.33%
Total	1,700	2.27%

Table XI: Sample sizes of End-Users sample; summarised building project categories

End-Users Sample (combined groups)	n=	Maximum Margin of Error
Recent Builders / Renovators	500	4.33%
Delayed Builders / Renovators	200	6.89%
Intending Builders / Renovators	500	4.33%
Homeowners	500	4.33%
Total	1,700	2.27%

Additional information available

The questionnaires also collected additional profiling information pertinent to each sample group. Where these variables showed statistically significant differences in the results, these are highlighted in the report and / or **Appendix C**. A copy of all questionnaires is available in **Appendix E**.

Appendix B: Notes on the Reporting

Sample sizes

Although Ipsos interviewed a robust sample of respondents, when analysing the results, some sub-groups were smaller than what would be considered a robust sample size. Therefore, when a sample size was lower than ideal, Ipsos has indicated as such with the following: ***Caution: Low base size, results indicative only.**

Limitations of the study

The quality and representativeness of the quantitative survey sample was contingent on several factors:

- **Sample source:** The profile of people accessible via any one sample source is likely to reflect that source. Therefore, it is important to use a wide range of sources to minimise source bias, as we have done. For this project, the use of a small sample of BCITO and Skills as sources means that the Business sample might slightly be skewed towards Businesses who hire Apprentices, whilst the use of the opt-in Ipsos panels might skew all the samples towards those who are positively inclined towards market research.
- **Subject:** the COVID-19 pandemic is a high-profile subject and one that could be anticipated to either increase or decrease participation, depending on the individual respondent. The nature of this influence cannot be quantified within the design of this project.
- **Client:** With MBIE cited as the client of the project, Businesses' interest in participating will be influenced by their perceptions of MBIE. The nature of this influence cannot be quantified within the design of this project.
- **Incentive:** This is both monetary and change-oriented. Those incentivised by monetary promise will have been incentivised by the prizes used to attract those contacted outside of the opt-in Ipsos panels. Those incentivised by the desire to contribute to positive change will have been influenced by their perceptions of MBIE's ability to enact worthwhile change. The nature of this influence cannot be quantified within the design of this project.
- **Effort:** The length of the questionnaire and complexity of the questions used will influence response. At 11 minutes' average completion duration and the use of a consistent, straightforward questionnaire approach, we believe the effort was kept reasonable. Few mid-stream questionnaire drop-outs occurred.
- **Timing:** External events and news will impact respondents' answers at the time they complete their questionnaires.

Appendix C: Additional Quantitative Sub-Sample Analysis

Significant differences

Significant differences at the 95% confidence interval are shown throughout the report:

- **Green text** has been used to denote percentages that are significantly higher than those recorded for all those answering said question.
- **Red text** has been used to denote percentages that are significantly lower than those recorded for all those answering said question.

Percentages may not always sum to 100% due to rounding and/or where respondents are able to give more than one answer. Sub-sample sizes also influence the maximum margin of error, so a percentage difference between two numbers may be indicated as significant for one answer but not for another where the base size is smaller, thereby increasing the margin of error.

Terminology

NETTS: Refers to when more than one response or sample group has been combined. For example, combining the proportion giving answers of “Very Satisfied” and “Satisfied” to produce a Nett Satisfied number (to represent who were satisfied to some degree).

Section 1: Paperwork, processes and procedures

Time and effort taken to get paperwork, processes and procedures done –Sub-groups of relevance

Being one of the larger sub-groups, Air Conditioning & Heating Services Workers were amongst the most commonly noted as being statistically significantly different in their opinions.

According to Table 2, workers in Air Conditioning & Heating Services (53% cf. 32% of all Workers) were significantly more likely to report that getting *building consents granted* had got worse.

Workers in House Construction were significantly more likely to report no change for *getting titles, drawings and council records* (54% cf. 36% of all Workers). Workers in Air Conditioning & Heating Services were divided – almost half (47% cf. 30% of all Workers) were significantly more likely to report that *getting titles, drawings and similar council records* had got worse, whilst the other half (46% cf. 19% of all Workers) were more significantly likely to report it had got better.

Workers in Air Conditioning & Heating Services and House Construction were significantly more likely to report that *building inspections completed* (54% and 51% respectively cf. 31% of all Workers) and *finance and/or loans approved* (49% and 46% respectively cf. 28% of all Workers) had got worse.

Workers in Air Conditioning & Heating Services (49% cf. 25% of all Workers) were significantly more likely to report that *quotes from product suppliers (e.g. wholesalers or retailers)* had got better.

Workers in Air Conditioning & Heating Services (53% cf. 29% of all Workers) were significantly more likely to report that *quotes from service suppliers (e.g. specialist workers)* had got worse.

Table 2: Paperwork, processes and procedures – Workers (services)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	Total	Air Conditioning & Heating Services	House Construction
Building consents granted			
<i>Base, n=</i>	389	59	41
Has got worse	32%	53%	44%
No change	32%	7%	37%
Has got better	21%	39%	12%
Don't know / not applicable	16%	2%	7%
Getting titles, drawings & similar council records			
<i>Base, n=</i>	389	59	41
Has got worse	30%	47%	29%
No change	36%	3%	54%
Has got better	19%	46%	12%
Don't know / not applicable	16%	3%	5%
Building inspections completed			
<i>Base, n=</i>	389	59	41
Has got worse	31%	54%	51%
No change	34%	12%	32%
Has got better	23%	32%	12%
Don't know / not applicable	12%	2%	5%
Finance and/or loans approved			
<i>Base, n=</i>	389	59	41
Has got worse	28%	49%	46%
No change	28%	2%	17%
Has got better	25%	44%	24%
Don't know / not applicable	20%	5%	12%
Quotes from product suppliers (e.g. wholesalers / retailers)			
<i>Base, n=</i>	389	59	41
Has got worse	34%	41%	34%
No change	31%	8%	37%
Has got better	25%	49%	17%
Don't know / not applicable	10%	2%	12%
Quotes from service suppliers (e.g. specialist workers)			
<i>Base, n=</i>	389	59	41
Has got worse	29%	53%	22%
No change	35%	10%	44%
Has got better	25%	34%	27%
Don't know / not applicable	11%	3%	27%

According to Table 3, smaller Businesses (with an annual turnover below \$1 M) were significantly less likely to believe that things had got better, especially for *building consents granted* (9% cf. 14% of all Businesses), *getting titles, drawings and similar council records* (11% cf. 15% of all Businesses), *building inspections completed* (9% cf. 14% of all Businesses), *quotes from product suppliers* (10% cf. 14% of all Businesses) and *quotes from service suppliers* (7% cf. 14% of all Businesses).

Businesses with an annual turnover of more than \$20 M were significantly more likely to believe that things had got better, especially *building consents granted* (32% cf. 14% of all Businesses), *getting titles, drawings and similar council records* (26% cf. 15% of all Businesses), *building inspections completed* (29% cf. 14% of all Businesses), *finance and/or loans approved* (27% cf. 16%), *quotes from product suppliers* (25% cf. 14% of all Businesses) and *quotes from service suppliers* (30% cf. 14% of all Businesses).

Table 3: Paperwork, processes and procedures – Businesses (turnover)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Building consents granted				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	38%	37%	41%	37%
No change	32%	31%	32%	28%
Has got better	14%	9%	16%	32%
Don't know / not applicable	16%	23%	11%	3%
Getting titles, drawings & similar council records				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	30%	26%	32%	36%
No change	40%	41%	40%	37%
Has got better	15%	11%	17%	26%
Don't know / not applicable	15%	22%	11%	2%
Building inspections completed				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	36%	33%	41%	37%
No change	32%	34%	28%	29%
Has got better	14%	9%	17%	29%
Don't know / not applicable	18%	24%	15%	5%
Finance and/or loans approved				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	25%	24%	25%	28%
No change	34%	29%	39%	36%
Has got better	16%	13%	16%	27%
Don't know / not applicable	25%	34%	20%	9%
Quotes from product suppliers (e.g. wholesalers / retailers)				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	42%	41%	44%	42%
No change	37%	40%	36%	30%
Has got better	14%	10%	17%	25%
Don't know / not applicable	6%	9%	3%	2%
Quotes from service suppliers (e.g. specialist workers)				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	40%	41%	41%	38%
No change	38%	39%	37%	31%
Has got better	14%	7%	17%	30%
Don't know / not applicable	8%	12%	5%	1%

According to Table 4, Current / Recent Renovators and Renovation Delayers were significantly less likely to believe that *getting building consents granted* had got worse (13% and 20% respectively cf. 32% of all End-Users), whilst Build Delayers were significantly more likely to believe that *getting building consents granted* had got better (16% cf. 8% of all End-Users).

Again, Current / Recent Renovators and Renovation Delayers (10% and 19% respectively cf. 29% of all End-Users) were less likely to believe that *getting titles, drawings and similar council records* had got worse, whilst Build Delayers were significantly more likely to believe that it had got better (19% cf. 7% of all End-Users).

Current / Recent Renovators were significantly less likely to believe that *getting building inspections completed* had got worse (11% cf. 33% of all End-Users).

Current / Recent Builders and Renovators (30% and 35% respectively cf. 44% of all End-Users) were significantly less likely to believe that *quotes from service suppliers* had got worse.

Table 4: Paperwork, processes and procedures – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Getting building consents granted					
<i>Base, n=</i>	1,700	115	385	90	110
Has got worse	32%	37%	13%	36%	20%
No change	28%	32%	21%	39%	25%
Has got better	8%	8%	6%	16%	6%
Don't know / not applicable	32%	23%	61%	10%	49%
Getting titles, drawings & similar council records					
<i>Base, n=</i>	1,700	115	385	90	110
Has got worse	29%	29%	10%	38%	19%
No change	34%	43%	27%	29%	29%
Has got better	7%	8%	6%	19%	7%
Don't know / not applicable	30%	20%	57%	14%	45%
Getting building inspections completed					
<i>Base, n=</i>	1,500	115	385	0	0
Has got worse	33%	28%	11%	-	-
No change	29%	34%	22%	-	-
Has got better	7%	10%	6%	-	-
Don't know / not applicable	31%	28%	60%	-	-
Finance and/or loans approved					
<i>Base, n=</i>	1,700	115	385	90	110
Has got worse	25%	30%	11%	46%	18%
No change	29%	30%	25%	29%	25%
Has got better	17%	20%	13%	13%	16%
Don't know / not applicable	29%	20%	50%	12%	40%

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Quotes from product suppliers (e.g. wholesalers / retailers)					
<i>Base, n=</i>	1,700	115	385	90	110
Has got worse	41%	30%	30%	41%	38%
No change	33%	34%	43%	31%	31%
Has got better	9%	10%	8%	14%	9%
Don't know / not applicable	17%	26%	19%	13%	22%
Quotes from service suppliers (e.g. specialist workers)					
<i>Base, n=</i>	1,700	115	385	90	110
Has got worse	44%	30%	35%	41%	50%
No change	32%	37%	38%	30%	28%
Has got better	9%	11%	9%	16%	10%
Don't know / not applicable	15%	22%	18%	13%	12%

According to Table 5, Build Planners were significantly more likely to believe that *getting building consents granted* had got better (16% cf. 8% of all End-Users), whilst Homeowners were significantly more likely to believe that it had got worse (48% cf. 32% of all End-Users).

Both Build Planners and Homeowners (38% and 42% respectively cf. 29% of all End-Users) were significantly more likely to believe that *getting titles, drawings and similar council records* had got worse. Build Planners and Homeowners (43% and 50% respectively cf. 33% of all End-Users) were also significantly more likely to believe that *getting building inspections completed* had got worse.

Regarding *finance and/or loans approved*, Renovation Planners were significantly more likely to believe there was no change (37% cf. 29% of all End-Users). Despite this, Build Planners and Homeowners (37% and 30% respectively cf. 25% of all End-Users) were significantly more likely to believe that *getting finance and/or loans approved* had got worse.

Finally, Build Planners were significantly more likely to believe that *quotes from product suppliers* (19% cf. 9% of all End-Users) and *quotes from service suppliers* (13% cf. 9% of all End-Users) had got better.

Table 5: Paperwork, processes and procedures – End-Users (planners and homeowners)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP			
	Total	Build planners	Renovation planners	Home-owners
Getting building consents granted				
<i>Base, n=</i>	1,700	165	335	500
Has got worse	32%	34%	32%	48%
No change	28%	37%	32%	25%
Has got better	8%	16%	6%	9%
Don't know / not applicable	32%	13%	31%	18%
Getting titles, drawings & similar council records				
<i>Base, n=</i>	1,700	165	335	500
Has got worse	29%	38%	27%	42%
No change	34%	40%	38%	33%
Has got better	7%	13%	5%	6%
Don't know / not applicable	30%	10%	30%	19%
Getting building inspections completed				
<i>Base, n=</i>	1,500	165	335	500
Has got worse	33%	43%	30%	50%
No change	29%	35%	34%	28%
Has got better	7%	12%	5%	5%
Don't know / not applicable	31%	10%	31%	17%
Finance and/or loans approved				
<i>Base, n=</i>	1,700	165	335	500
Has got worse	25%	37%	21%	30%
No change	29%	28%	37%	29%
Has got better	17%	24%	13%	21%
Don't know / not applicable	29%	11%	29%	20%
Quotes from product suppliers (e.g. wholesalers / retailers)				
<i>Base, n=</i>	1,700	165	335	500
Has got worse	41%	47%	42%	51%
No change	33%	22%	37%	25%
Has got better	9%	19%	7%	7%
Don't know / not applicable	17%	11%	14%	17%
Quotes from service suppliers (e.g. specialist workers)				
<i>Base, n=</i>	1,700	165	335	500
Has got worse	44%	48%	47%	51%
No change	32%	27%	34%	28%
Has got better	9%	13%	7%	5%
Don't know / not applicable	15%	12%	12%	16%

Section 2: Products and materials

Impact on products and materials used – Businesses and Workers – Sub-groups of relevance

According to Table 6, other than the *quality of products supplied*, Businesses were significantly more likely to report that all aspects measured concerning *Products and Materials* had got worse rather than better. Larger Businesses were faring better than smaller Businesses in this regard, although most still felt that things were worse than pre-COVID-19.

Smaller Businesses (with an annual turnover below \$1 M) were significantly more likely to state that *being able to order preferred products* (69% cf. 63% of all Businesses), *having preferred products supplied on time* (73% cf. 67% of all Businesses) and *cost of products* (74% cf. 69% of all Businesses) had got worse since before the COVID-19 pandemic.

However, larger Businesses (with an annual turnover of more than \$20 M) were significantly more likely to feel things had improved: *being able to order preferred products* (32% cf. 13% of all Businesses), *having preferred products supplied on time* (24% cf. 11% of all Businesses), *quality of products supplied* (28% cf. 12% of all Businesses), *cost of products* (26% cf. 11% of all Businesses), *freight costs* (25% cf. 11% of all Businesses) and *cost of tools and other equipment* (24% cf. 11% of all Businesses).

Table 6: Impact on products and materials used – Businesses (turnover)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Being able to order preferred products				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	63%	69%	63%	46%
No change	19%	16%	21%	21%
Has got better	13%	8%	15%	32%
Don't know / not applicable	5%	7%	2%	2%
Having preferred products supplied on time				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	67%	73%	65%	50%
No change	18%	15%	18%	23%
Has got better	11%	6%	15%	24%
Don't know / not applicable	4%	7%	2%	2%
Quality of products supplied (including any substituted products)				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	25%	26%	24%	29%
No change	56%	55%	61%	39%
Has got better	12%	7%	12%	28%
Don't know / not applicable	7%	11%	3%	3%
Cost of products (excluding freight costs)				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	69%	74%	69%	50%
No change	16%	13%	16%	21%
Has got better	11%	7%	12%	26%
Don't know / not applicable	4%	6%	2%	3%

Businesses	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Freight costs				
Base, n=	1,118	470	443	123
Has got worse	61%	61%	64%	48%
No change	18%	18%	19%	22%
Has got better	11%	6%	12%	25%
Don't know / not applicable	10%	15%	5%	5%
Cost of tools & other equipment				
Base, n=	1,118	470	443	123
Has got worse	50%	50%	50%	38%
No change	30%	30%	29%	35%
Has got better	11%	7%	12%	24%
Don't know / not applicable	10%	13%	8%	3%

According to Table 7, experienced Workers (13 years or more in the building and construction sector) were significantly more likely to believe that things had got worse post the COVID-19 pandemic: *being able to order preferred products* (52% cf. 39% of all Workers), *having preferred products supplied on time* (57% cf. 40% of all Workers), *cost of products* (60% cf. 39% of all Workers) and *freight costs* (50% cf. 35% of all Workers).

Table 7: Impact on products and materials used – Workers (tenure in the building and construction sector)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	TENURE IN THE BUILDING & CONSTRUCTION SECTOR			
	Total	NETT 1–5 years	NETT 6–12 years	NETT 13+ years
Being able to order preferred products				
Base, n=	1,038	494	416	128
Has got worse	39%	40%	33%	52%
No change	27%	25%	30%	24%
Has got better	27%	25%	33%	18%
Don't know / not applicable	7%	9%	4%	5%
Having preferred products supplied on time				
Base, n=	1,038	494	416	128
Has got worse	40%	44%	31%	57%
No change	27%	27%	31%	19%
Has got better	26%	21%	33%	17%
Don't know / not applicable	7%	9%	5%	7%
Quality of products supplied (including any substituted products)				
Base, n=	1,038	494	416	128
Has got worse	20%	21%	19%	21%
No change	45%	46%	42%	52%
Has got better	26%	22%	34%	17%
Don't know / not applicable	8%	11%	5%	9%

Workers	Total	NETT 1–5 years	NETT 6–12 years	NETT 13+ years
Cost of products (excluding freight costs)				
<i>Base, n=</i>	1,038	494	416	128
Has got worse	39%	41%	31%	60%
No change	27%	27%	31%	13%
Has got better	25%	20%	33%	18%
Don't know / not applicable	9%	12%	5%	9%
Freight costs				
<i>Base, n=</i>	1,038	494	416	128
Has got worse	35%	36%	29%	50%
No change	29%	31%	30%	20%
Has got better	24%	18%	35%	15%
Don't know / not applicable	11%	15%	6%	15%
Cost of tools & other equipment				
<i>Base, n=</i>	1,038	494	416	128
Has got worse	32%	34%	26%	39%
No change	35%	36%	35%	30%
Has got better	25%	20%	34%	16%
Don't know / not applicable	8%	10%	5%	15%

Impact on products and materials used – End-Users – Sub-groups of relevance

According to Table 8, Current / Recent Renovators were significantly more likely to see no change in *being able to order preferred products* (39% cf. 26% of all End-Users), *having preferred products supplied on time* (33% cf. 20% of all End-Users), *quality of products supplied* (69% cf. 58% of all End-Users) and *cost of products* (28% cf. 17% of all End-Users).

Build Delayers were significantly more likely to believe that *being able to order preferred products* (17% cf. 6% of all End-Users), *having preferred products supplied on time* (20% cf. 6% of all End-Users) and *cost of products* (14% cf. 5% of all End-Users) had got better.

Current / Recent Builders also were significantly more likely to report that the *cost of products* had improved (10% cf. 5% of all End-Users), whilst for Renovation Delayers the *quality of products supplied* had improved (12% cf. 6% of all End-Users).

Table 8: Impact on products and materials used – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delays	Renovation delays
Being able to order preferred products					
Base, n=	1,700	115	385	90	110
Has got worse	58%	44%	47%	48%	52%
No change	26%	32%	39%	23%	28%
Has got better	6%	10%	7%	17%	7%
Don't know / not applicable	10%	13%	7%	12%	13%
Having preferred products supplied on time					
Base, n=	1,700	115	385	90	110
Has got worse	64%	48%	54%	39%	61%
No change	20%	31%	33%	33%	19%
Has got better	6%	7%	4%	20%	7%
Don't know / not applicable	10%	14%	8%	8%	13%
Quality of products supplied (including any substituted products)					
Base, n=	1,700	115	385	90	110
Has got worse	21%	17%	14%	18%	23%
No change	58%	57%	69%	58%	45%
Has got better	6%	10%	5%	12%	12%
Don't know / not applicable	14%	17%	12%	12%	21%
Cost of products (including freight costs)					
Base, n=	1,700	115	385	90	110
Has got worse	66%	59%	57%	46%	56%
No change	17%	17%	28%	30%	18%
Has got better	5%	10%	4%	14%	8%
Don't know / not applicable	11%	13%	12%	10%	17%

According to Table 9, Build Planners were significantly more likely to state that *being able to order preferred products* (10% cf. 6% of all End-Users), *having preferred products supplied on time* (13% cf. 6% of total End-Users), *quality of products supplied* (13% cf. 6% of all End-Users) and *cost of products* (10% cf. 5% of all End-Users) had got better.

Table 9: Impact on products and materials used – End-Users (planners and homeowners)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP			
	Total	Build planners	Renovation planners	Home-owners
Being able to order preferred products				
Base, n=	1,700	165	335	500
Has got worse	58%	59%	61%	71%
No change	26%	21%	25%	15%
Has got better	6%	10%	4%	2%
Don't know / not applicable	10%	10%	9%	11%
Having preferred products supplied on time				
Base, n=	1,700	165	335	500
Has got worse	64%	67%	68%	77%
No change	20%	13%	18%	9%
Has got better	6%	13%	4%	2%
Don't know / not applicable	10%	7%	10%	11%
Quality of products supplied (including any substituted products)				
Base, n=	1,700	165	335	500
Has got worse	21%	18%	19%	31%
No change	58%	56%	64%	50%
Has got better	6%	13%	4%	3%
Don't know / not applicable	14%	13%	12%	16%
Cost of products (including freight costs)				
Base, n=	1,700	165	335	500
Has got worse	66%	67%	71%	78%
No change	17%	14%	17%	9%
Has got better	5%	10%	4%	2%
Don't know / not applicable	11%	9%	9%	12%

Types of products most difficult to find and order – Businesses – Sub-groups of relevance

According to Table 10, *Joinery and kitchen cabinetry* (32% cf. 23% of all Businesses), *roofing material* (34% cf. 23% of all Businesses), *reinforcing steel* (32% cf. 21% of all Businesses) and *structural steel* (28% cf. 18% of all Businesses) were also the most difficult to find and order for Businesses involved in House Construction / Residential Building Construction.

Table 10: Types of products most difficult to find and order – Businesses (industry groups)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS INDUSTRY GROUP			
	Total	NETT Trades	NETT Commercial / Civil Construction	NETT House Construction Companies / Other Residential Building Construction Companies
Base, n=	369	215	26*	111
Timber – structural	59%	44%	73%	86%
Timber – other / timber across the board / timber unspecified	47%	37%	46%	69%
Timber – laminated	44%	33%	42%	68%
Exterior wall cladding materials (e.g. metal cladding, wood cladding, cement board, etc.)	43%	27%	58%	74%
Appliances (e.g. whiteware, heat pumps, etc.)	33%	29%	23%	42%
Electrical material (fittings, wires, etc.)	28%	29%	31%	27%
Doors & windows (aluminium, PVC, etc.)	28%	24%	38%	38%
Plumbing & gas fitting & drainage material (including tapware)	25%	21%	23%	32%
Joinery & kitchen cabinetry	23%	16%	38%	32%
Roofing material	23%	17%	35%	34%
Floor covering (hard material)	21%	17%	38%	25%
Hardware (nails, screws & bolts)	21%	19%	27%	25%
Reinforcing steel	21%	15%	23%	32%
Structural steel – steel stud / framing steel	18%	10%	46%	28%
Sanitary fixtures	18%	16%	19%	22%
Tools	18%	20%	12%	14%
Door & window hardware	17%	13%	27%	21%
Ceiling / suspended ceiling material (wood, gypsum, vinyl, fibre cement, etc.)	16%	13%	23%	19%
Paints, stains, solvents, special liquids	16%	13%	19%	21%
Ceramic tiles	16%	13%	27%	17%
Metal / steel products (e.g. gates, fences, metal doors, etc.)	15%	10%	27%	20%
Doors (e.g. entrance, room doors)	13%	11%	27%	14%
Interior wall lining material	13%	10%	19%	16%
Glass / glazing products	12%	8%	19%	18%
Insulation materials	12%	9%	12%	18%
Mechanical services (heating / cooling systems, air-conditioning systems, fire systems, etc.)	11%	8%	27%	9%
Ready concrete (ready mix)	11%	8%	4%	17%
Cement	9%	7%	12%	13%
Special clothing (e.g. PPE, safety)	9%	10%	8%	7%

Businesses	Total	NETT Trades	NETT Commercial / Civil Construction	NETT House Construction Companies / Other Residential Building Construction Companies
<i>Base, n=</i>	369	215	26*	111
Waterproofing materials	8%	7%	12%	7%
Landscaping materials	7%	5%	8%	9%
Special & technical equipment – industrial equipment	7%	5%	12%	7%
Aggregates	7%	7%	12%	6%
Furniture	6%	4%	8%	10%
Garage doors	6%	3%	15%	7%
Textiles (e.g. carpeting, curtains)	6%	3%	12%	9%
Manufacturing equipment	5%	4%	12%	6%
Stoneware (e.g. bricks, blocks, etc.)	5%	4%	8%	6%
Elevators / escalators	4%	1%	19%	4%

***Caution:** Low base size, results indicative only.

Types of products most difficult to find and order – End-Users – Sub-groups of relevance

According to Table 11, Current / Recent Builders were significantly more likely to state *that structural timber* (49% cf. 32% of all End-Users) was difficult to find and order. For Build Delayers, *exterior wall cladding materials* (26% cf. 12% of all End-Users), *ceiling / suspended ceiling material* (28% cf. 12% of all End-Users) and *electrical material* (23% cf. 11% of all End-Users) were significantly more likely to be difficult to find and order.

Table 11: Types of products most difficult to find and order – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Base, n=	333	51	182	43*	57
Timber – structural	32%	49%	31%	30%	19%
Appliances (e.g. whiteware, heat pumps, etc.)	29%	35%	29%	19%	30%
Timber – other / timber across the board / timber unspecified	28%	41%	31%	9%	19%
Doors & windows (aluminium, PVC, etc.)	21%	20%	18%	35%	25%
Timber – laminated	19%	31%	19%	19%	11%
Joinery & kitchen cabinetry	17%	20%	15%	23%	18%
Ceramic tiles	13%	18%	11%	12%	14%
Furniture	12%	16%	13%	14%	5%
Exterior wall cladding materials (e.g. metal cladding, wood cladding, cement board, etc.)	12%	16%	8%	26%	12%
Ceiling / suspended ceiling material (wood, gypsum, vinyl, fibre cement, etc.)	12%	14%	8%	28%	11%
Doors (e.g. entrance, room doors)	12%	12%	9%	19%	16%
Floor covering (hard material)	12%	10%	14%	5%	11%
Electrical material (fittings, wires, etc.)	11%	8%	10%	23%	9%
Textiles (e.g. carpeting, curtains)	11%	16%	9%	14%	9%
Paints, stains, solvents, special liquids	10%	8%	10%	7%	14%
Glass / glazing products	10%	12%	10%	16%	2%
Plumbing & gas fitting & drainage material (including tapware)	9%	12%	9%	14%	5%
Door & window hardware	8%	10%	10%	5%	4%
Interior wall lining material	8%	16%	8%	5%	7%
Wallpaper & other special finishes	8%	10%	8%	7%	7%
Hardware (nails, screws & bolts)	8%	10%	8%	7%	5%
Metal / steel products (e.g. gates, fences, metal doors, etc.)	8%	8%	6%	16%	5%
Roofing material	8%	10%	7%	12%	5%
Landscaping materials	7%	6%	7%	12%	7%
Waterproofing materials	7%	6%	5%	9%	11%
Insulation materials	7%	10%	7%	7%	2%
Mechanical services (heating / cooling systems, air-conditioning systems, fire systems, etc.)	7%	14%	5%	7%	5%
NETT Don't know	9%	12%	10%	5%	5%

***Caution:** Low base size, results indicative only.

Types of products with the longest delivery timeframes / delays – Businesses – Sub-groups of relevance

According to Table 12, within industry groups, House Construction Companies / Other Residential Building Companies were significantly more likely to consider *structural timber* (69% cf. 42% of all Businesses), *laminated timber* (59% cf. 35% of all Businesses), *timber (across the board)* (49% cf. 32% of all Businesses) and *exterior wall cladding materials* (51% cf. 29% of all Businesses) as products with the longest delivery timeframes / delays. For Commercial / Civil Construction Businesses, these were *mechanical services* and *metal and steel products* (20% cf. 6% of all Businesses).

Table 12: Products with the longest delivery timeframes / delays – Businesses (industry groups)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS INDUSTRY GROUP			
	Total	NETT Trades	NETT Commercial / Civil Construction	NETT House Construction Companies / Other Residential Building Construction Companies
Base, n=	395	227	30*	121
Timber – structural	42%	29%	40%	69%
Timber – laminated	35%	24%	37%	59%
Timber – other / timber across the board	32%	24%	27%	49%
Exterior wall cladding materials (e.g. metal cladding, wood cladding, cement board, etc.)	29%	18%	30%	51%
Appliances (e.g. whiteware, heat pumps, etc.)	22%	19%	3%	31%
Doors & windows (aluminium, PVC, etc.)	20%	18%	20%	27%
Electrical material (fittings, wires, etc.)	14%	18%	7%	10%
Plumbing & gas fitting & drainage material (including tapware)	14%	15%	7%	13%
Joinery & kitchen cabinetry	12%	10%	13%	12%
Roofing material	12%	11%	10%	15%
Structural steel – steel stud / framing steel	9%	6%	17%	12%
Sanitary fixtures	9%	9%	10%	9%
Ceramic tiles	9%	7%	13%	9%
Reinforcing steel	9%	6%	10%	14%
Floor covering (hard material)	8%	4%	13%	13%
Doors (e.g. entrance, room doors)	8%	7%	10%	12%
Door & window hardware	7%	6%	7%	11%
Mechanical services (heating / cooling systems, air-conditioning systems, fire systems, etc.)	6%	5%	20%	5%
Glass / glazing products	6%	4%	7%	8%
Ceiling / suspended ceiling material (wood, gypsum, vinyl, fibre cement, etc.)	6%	3%	10%	10%
Paints, stains, solvents, special liquids	6%	7%	7%	6%
Metal / steel products (e.g. gates, fences, doors)	6%	4%	20%	7%
Interior wall lining material	6%	4%	10%	7%
Ready concrete (ready mix)	6%	4%	0%	9%
Hardware (nails, screws & bolts)	5%	3%	0%	9%
Manufacturing equipment	5%	3%	10%	7%
NETT Don't know	6%	7%	13%	2%

***Caution:** Low base size, results indicative only.

Types of products with the longest delivery timeframes / delays – End-Users – Sub-groups of relevance

According to Table 13, Current / Recent Builders were significantly more likely to state that *structural timber* had the longest delivery timeframes / delays (33% cf. 18% of all End-Users). Build Delayers were significantly more likely to have had an issue with *doors and windows* (29% cf. 10% of all End-Users), *plumbing and gas fitting and drainage material (including tapware)* (14% cf. 5% of all End-Users) and *exterior wall cladding materials* (17% cf. 5% of all End-Users).

Table 13: Types of products with the longest delivery timeframes / delays – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current/ recent renovators	Build delayers	Renovation delayers
Base, n=	365	55	208	35*	67
Timber – structural	18%	33%	13%	29%	13%
Appliances (e.g. whiteware, heat pumps, etc.)	16%	24%	14%	11%	15%
Timber – other / timber across the board / timber unspecified	12%	22%	9%	14%	10%
Doors & windows (aluminium, PVC, etc.)	10%	9%	5%	29%	16%
Timber – laminated	9%	18%	7%	17%	4%
Joinery & kitchen cabinetry	8%	11%	8%	6%	6%
Furniture	7%	13%	6%	14%	4%
Floor covering (hard material)	7%	9%	6%	11%	6%
Ceramic tiles	6%	7%	5%	6%	9%
Doors (e.g. entrance, room doors)	6%	5%	2%	14%	12%
Door & window hardware	6%	4%	5%	14%	4%
Roofing material	5%	4%	4%	9%	7%
Plumbing & gas fitting & drainage material (including tapware)	5%	2%	4%	14%	3%
Exterior wall cladding materials (e.g. metal cladding, wood cladding, cement board, etc.)	5%	9%	1%	17%	4%
NETT Don't know	29%	27%	35%	14%	22%

***Caution:** Low base size, results indicative only.

Types of products with the greatest increase in price since the COVID-19 pandemic – Businesses – Sub-groups of relevance

According to Table 14, Businesses in House Construction / Other Residential Building Construction were significantly more likely to state that *timber (structural)* (69% cf. 46% of all Businesses), *timber (across the board)* (50% cf. 35% of all Businesses), *timber (laminated)* (55% cf. 35% of all Businesses), *exterior wall cladding materials* (49% cf. 26% of all Businesses), *structural steel* (36% cf. 21% of all Businesses), *hardware (nails, screws and bolts)* (27% cf. 17% of all Businesses), *interior wall lining material* (23% cf. 14% of all Businesses), *metal / steel products* (21% cf. 13% of all Businesses) and *floor covering (hard material)* (19% cf. 11% of all Businesses) had increased the most in price since the COVID-19 pandemic.

Table 14: Types of products with the greatest increase in price – Businesses (industry groups)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS INDUSTRY GROUP			
	Total	NETT Trades	NETT Commercial / Civil Construction	NETT House Construction Companies / Other Residential Building Construction Companies
Base, n=	424	245	33*	129
Timber – structural	46%	33%	48%	69%
Timber – other / timber across the board / timber unspecified	35%	26%	39%	50%
Timber – laminated	35%	24%	42%	55%
Exterior wall cladding materials (e.g. metal cladding, wood cladding, cement board, etc.)	26%	14%	30%	49%
Reinforcing steel	26%	17%	36%	41%
Electrical material (fittings, wires, etc.)	23%	25%	21%	20%
Plumbing & gas fitting & drainage material (including tapware)	22%	20%	18%	25%
Structural steel – steel stud / framing steel	21%	11%	36%	36%
Roofing material	21%	17%	27%	26%
Doors & windows (aluminium, PVC, etc.)	20%	13%	42%	27%
Hardware (nails, screws & bolts)	17%	13%	9%	27%
Ready concrete (ready mix)	16%	12%	18%	23%
Appliances (e.g. white-ware, heat pumps, etc.)	14%	11%	18%	18%
Cement	14%	12%	12%	19%
Joinery & kitchen cabinetry	14%	10%	12%	21%
Aggregates	14%	11%	21%	18%
Interior wall lining material	14%	11%	12%	23%
Metal / steel products (e.g. gates, fences, metal doors, etc.)	13%	9%	24%	21%
Glass / glazing products	12%	8%	18%	18%
Sanitary fixtures	12%	11%	12%	13%
Paints, stains, solvents, special liquids	12%	11%	12%	16%
Insulation materials	11%	7%	18%	18%
Doors (e.g. entrance, room doors)	11%	7%	15%	17%
Floor covering (hard material)	11%	7%	12%	19%
Ceiling / suspended ceiling material (wood, gypsum, vinyl, fibre cement, etc.)	11%	7%	12%	17%
Door & window hardware	10%	7%	21%	16%
Tools	10%	11%	12%	10%
Waterproofing materials	10%	9%	12%	12%
Mechanical services (heating / cooling systems, air-conditioning systems, fire systems, etc.)	9%	6%	12%	15%
Ceramic tiles	9%	7%	15%	13%
Garage doors	8%	6%	9%	14%
Landscaping materials	7%	4%	9%	12%
Stoneware (e.g. bricks, blocks, etc.)	7%	7%	6%	9%

Businesses	Total	NETT Trades	NETT Commercial / Civil Construction	NETT House Construction Companies / Other Residential Building Construction Companies
Base, n=	424	245	33*	129
Special & technical equipment – industrial equipment	7%	5%	12%	9%
LED lightbulbs	6%	7%	6%	4%
Special clothing (e.g. PPE, safety)	6%	5%	6%	6%
Furniture	5%	4%	9%	6%
Curtain walls	5%	3%	9%	7%
Elevators / escalators	5%	4%	6%	8%
Manufacturing equipment	5%	4%	9%	6%
NETT Don't know	8%	9%	12%	4%

***Caution:** Low base size, results indicative only.

Types of products with the greatest increase in price since the COVID-19 pandemic – End-Users – Sub-groups of relevance

According to Table 15, Build Delayers were significantly more likely to mention *appliances* (27% cf. 12% of all End-Users), *ceramic tiles* (22% cf. 8% of all End-Users), *ceiling / suspended ceiling material* (17% cf. 7% of all End-Users) and *doors* (20% cf. 7% of all End-Users) as the types of products with the greatest increase in price since the COVID-19 pandemic.

Table 15: Types of products with the greatest increase in price – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Base, n=	389	68	218	41*	62
Timber – structural	26%	32%	26%	22%	24%
Timber – other / timber across the board	20%	19%	22%	12%	16%
Timber – laminated	14%	19%	12%	20%	13%
Appliances (e.g. whiteware, heat pumps, etc.)	12%	16%	9%	27%	10%
Plumbing & gas fitting & drainage material (including tapware)	9%	12%	9%	10%	6%
Doors & windows (aluminium, PVC, etc.)	9%	16%	5%	20%	6%
Joinery & kitchen cabinetry	9%	6%	10%	15%	5%
Furniture	8%	13%	6%	15%	5%
Paints, stains, solvents, special liquids	8%	3%	9%	12%	8%
Ceramic tiles	8%	6%	5%	22%	10%
Electrical material (fittings, wires, etc.)	7%	10%	7%	15%	2%
Metal / steel products (e.g. gates, fences, metal doors, etc.)	7%	6%	8%	12%	3%
Interior wall lining material	7%	13%	6%	5%	8%
Ceiling / suspended ceiling material (wood, gypsum, vinyl, fibre cement, etc.)	7%	12%	5%	17%	3%
Doors (e.g. entrance, room doors)	7%	4%	5%	20%	6%

End-Users	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Base, n=	389	68	218	41*	62
Glass / glazing products	7%	9%	6%	10%	6%
Exterior wall cladding materials (e.g. metal cladding, wood cladding, cement board, etc.)	6%	16%	4%	7%	5%
Floor covering (hard material)	6%	6%	6%	12%	3%
Roofing material	6%	4%	6%	10%	8%
Hardware (nails, screws & bolts)	6%	7%	7%	5%	2%
Landscaping materials	6%	7%	6%	5%	3%
Door & window hardware	6%	9%	4%	10%	5%
Insulation materials	6%	7%	5%	10%	3%
Mechanical services (heating / cooling systems, air-conditioning systems, fire systems, etc.)	6%	6%	4%	12%	8%
Textiles (e.g. carpeting, curtains)	5%	6%	5%	7%	5%
Waterproofing materials	5%	9%	2%	10%	8%
Security systems	5%	1%	5%	10%	3%
Wallpaper & other special finishes	5%	6%	4%	7%	5%
NETT Don't know	32%	34%	34%	12%	32%

***Caution:** Low base size, results indicative only.

Product supply problems – New Zealand vs overseas – Businesses and Workers – Sub-groups of relevance

According to Table 16, Businesses in Project Management and Other Construction-Related Services (34% and 43% respectively cf. 21% of all Businesses) were significantly more likely to believe that the product supply problems were highest for *New Zealand-made products*, whereas those in the Construction sector were significantly more likely to state that the product supply problems were *equally bad for New Zealand and imported products* (50% cf. 39% of all Businesses).

Table 16: Product supply problem – New Zealand vs overseas – Businesses (main type of work)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	MAIN TYPE OF WORK BUSINESS DOES						
	Total	Construction	Project Management	Specifier / Architecture / Engineer / Surveyor, etc.	Manufacturing	Other Construction-Related Services	Retail / Wholesale
Base, n=	1,118	518	90	245	93	100	63
NZ-made products	21%	13%	34%	20%	22%	43%	27%
Imported products	33%	32%	36%	30%	43%	28%	40%
Equally bad for NZ & imported products	39%	50%	27%	35%	31%	25%	22%
Don't know	8%	6%	3%	15%	4%	4%	11%

According to Table 17, Businesses with an annual business turnover of more than \$20 M were significantly more likely to state that the product supply problems were highest for *New Zealand-made products* (40% cf. 21% of all Businesses).

Table 17: Product supply problem – New Zealand vs overseas – Businesses (turnover)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Base, n=	1,118	470	443	123
NZ-made products	21%	18%	20%	40%
Imported products	33%	29%	36%	32%
Equally bad for NZ & imported products	39%	40%	41%	28%
Don't know	8%	13%	2%	0%

Similar to Businesses, Workers in Project Management and Other Construction-Related Services (51% and 43% respectively cf. 34% of all Workers) were significantly more likely to believe that the product supply problems were highest for *New Zealand-made products*, whereas those in the Construction sector were significantly more likely (28% cf. 22% of all Workers) to state that the product supply problems were *equally bad for New Zealand and imported products* (see Table 18). Workers in Manufacturing sector were less likely to believe that the product supply problems were highest for *New Zealand-made products* (see Table 18).

Table 18: Product supply problem – New Zealand vs overseas – Workers (main type of work)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	MAIN TYPE OF WORK BUSINESS DOES						
	Total	Construction	Project Management	Specifier / Architecture / Engineer / Surveyor, etc.	Manufacturing	Other Construction-Related Services	Retail / Wholesale
Base, n=	1,036	398	107	176	79	142	111
NZ-made products	34%	31%	51%	36%	22%	43%	30%
Imported products	35%	33%	28%	41%	41%	33%	38%
Equally bad for NZ & imported products	22%	28%	18%	17%	23%	15%	21%
Don't know	9%	7%	3%	6%	15%	9%	12%

Section 3: Changes in building / renovation design specifications

Changes in design preferences / project types since the COVID-19 pandemic – Businesses and Workers – Sub-groups of relevance

REGIONAL VARIATIONS OF NOTE

Businesses operating in Canterbury were significantly more likely to report more interest in better insulation (67% cf. 55% of all Businesses).

Business operating in Auckland were significantly more likely to report more interest in homes designed or modified for multigenerational living arrangements (52% cf. 46% of all Businesses).

Business operating in Auckland were significantly more likely to report more interest in multi-level buildings (41% cf. 33% of all Businesses).

REVENUE VARIATIONS

According to Table 19, Businesses with an annual turnover of more than \$20 M were significantly more likely to report more interest in *smaller offices and commercial spaces* (42% cf. 29% of all Businesses) and less interest in *smaller houses* (21% cf. 10% of all Businesses). They were also significantly more likely to report less interest in *using more durable materials* (21% cf. 6% of all Businesses), *using more energy-efficient systems, designs and appliances* (20% cf. 7% of all Businesses) and *using better heating and/or ventilation systems* (20% cf. 8% of all Businesses).

Table 19: Changes in design preferences / project types – Businesses (turnover)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Smaller offices & commercial space				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	10%	7%	10%	20%
No change	32%	29%	36%	25%
There is more interest	29%	24%	30%	42%
Don't know / not applicable	30%	40%	24%	13%
Smaller houses				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	10%	7%	10%	21%
No change	33%	33%	32%	35%
There is more interest	40%	40%	42%	38%
Don't know / not applicable	17%	19%	16%	6%
Larger houses				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	15%	13%	15%	28%
No change	40%	39%	42%	32%
There is more interest	27%	26%	28%	33%
Don't know / not applicable	18%	22%	15%	7%
Multi-level buildings				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	10%	6%	11%	20%
No change	35%	32%	37%	32%
There is more interest	30%	27%	30%	45%
Don't know / not applicable	26%	36%	22%	4%

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Homes designed / modified for extended families / multi-generational living arrangement				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	7%	4%	7%	19%
No change	30%	30%	31%	28%
There is more interest	42%	41%	42%	42%
Don't know / not applicable	21%	25%	19%	11%
Cheaper design / product designs				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	10%	7%	11%	24%
No change	38%	39%	40%	26%
There is more interest	36%	34%	36%	43%
Don't know / not applicable	16%	19%	13%	7%
More expensive design / product designs				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	18%	16%	17%	31%
No change	40%	38%	45%	30%
There is more interest	25%	23%	26%	36%
Don't know / not applicable	17%	24%	12%	3%
Home offices (number, size, etc.)				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	7%	4%	6%	21%
No change	30%	29%	31%	28%
There is more interest	41%	40%	41%	41%
Don't know / not applicable	23%	27%	22%	10%
More flexible residential design options				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	7%	3%	7%	22%
No change	34%	33%	38%	25%
There is more interest	40%	40%	39%	46%
Don't know / not applicable	19%	23%	16%	7%
Design / specifications for less environmental impact				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	8%	5%	7%	22%
No change	36%	37%	37%	33%
There is more interest	42%	40%	44%	42%
Don't know / not applicable	14%	18%	11%	3%
Interest in better-insulated buildings				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	6%	3%	6%	17%
No change	30%	29%	33%	25%
There is more interest	50%	51%	49%	50%
Don't know / not applicable	14%	17%	12%	8%

Businesses	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Using noise-reduction products / systems in interior walls				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	8%	5%	9%	20%
No change	41%	42%	42%	35%
There is more interest	31%	29%	32%	40%
Don't know / not applicable	20%	25%	17%	6%
Using more durable materials				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	6%	3%	7%	21%
No change	43%	45%	43%	41%
There is more interest	37%	34%	38%	36%
Don't know / not applicable	13%	17%	11%	2%
Using more energy-efficient systems, designs & appliances				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	7%	4%	6%	20%
No change	32%	31%	34%	27%
There is more interest	50%	50%	51%	48%
Don't know / not applicable	11%	15%	9%	5%
Using better heating and/or ventilation systems				
<i>Base, n=</i>	1,118	470	443	123
There is less interest	8%	5%	8%	20%
No change	30%	26%	33%	25%
There is more interest	48%	52%	46%	46%
Don't know / not applicable	14%	16%	13%	8%

Changes in design preferences / project types since the COVID-19 pandemic – End-Users – Sub-groups of relevance

According to Table 20, Build Planners and Homeowners were significantly more likely to report planning to use more energy-efficient systems, designs and appliances (30% and 28% respectively cf. 22% of all End-Users).

Current / Recent Builders and Build Delayers were significantly less likely to report *improving the insulation levels of their home* (10% and 11% respectively cf. 21% of all End-Users). Current / Recent Builders and Renovators were significantly more likely to report no changes in design preferences (54% and 56% respectively cf. 43% of all End-Users), whilst Build Delayers, Renovation Delayers and Build Planners were significantly less likely to do so (18%, 28% and 24% respectively cf. 43% of all End-Users)

Table 20: Changes in design preferences / project types – End-Users

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers	Build planners	Renovation planners	Home-owners
Base, n=	1,700	115	385	90	110	165	335	500
Using more energy efficient systems, designs & appliances	22%	22%	8%	22%	24%	30%	26%	28%
Using better heating and/or ventilation systems	22%	15%	14%	26%	15%	37%	22%	27%
Improving the insulation level of your home	21%	10%	19%	11%	25%	27%	21%	22%
Using things with less environmental impact	16%	10%	5%	17%	16%	22%	19%	22%
Using more durable materials	13%	10%	8%	26%	15%	22%	16%	11%
Choosing more flexible design options	13%	12%	10%	24%	13%	19%	16%	8%
Choosing cheaper design / product designs	11%	13%	9%	24%	25%	19%	11%	4%
Using more noise-reduction products / systems in interior walls	10%	9%	4%	13%	12%	16%	8%	14%
Adding or enlarging home-office spaces	9%	3%	5%	13%	6%	17%	11%	10%
Changing the design to accommodate additional extended family / multi-generational living arrangements	9%	12%	8%	14%	10%	10%	8%	8%
Changing to a smaller house	8%	8%	2%	23%	5%	17%	3%	11%
Changing to a larger house	6%	10%	3%	13%	5%	4%	5%	7%
Changing from a multi-story to a single-story home design	4%	7%	1%	12%	7%	8%	1%	4%
Choosing more expensive design / product designs	4%	7%	3%	9%	4%	4%	4%	2%
None of these	43%	54%	56%	18%	28%	24%	40%	46%

According to Table 21, life-stage clearly influences design preferences – End-Users aged 15–29 years were significantly more likely to report *choosing more flexible design options* (23% cf. 13% of all End-Users), while those aged 70+ had a significantly different opinion in this regard (7% cf. 13% of all End-Users).

Those aged 30–49 years were significantly more likely to report *adding or enlarging home-office spaces* (14% cf. 9% of all End-Users), *changing the design to accommodate additional extended family / multi-generational living arrangements* (12% cf. 9% of all End-Users) and *changing to a larger house* (8% cf. 6% of all End-Users).

In contrast, 50-69-year-olds were significantly more likely to report *changing to a smaller house* (11% cf. 8% of all End-Users). Those aged 50+ were significantly more likely to report no changes in design preferences (50% of 50-69-year-olds and 55% of those aged 70+ years cf. 43% of all End-Users), whereas those ages under 49 were significantly less likely to report no changes in design preferences (25% of 15-29-year-olds and 38% of those aged 30-49 years cf. 43% of all End-Users).

Table 21: Changes in design preferences / project types – End-Users (age groups)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER AGE GROUPS				
	Total	15–29 years	30–49 years	50–69 years	70+ years
Base, n=	1,700	244	596	616	244
Using more energy-efficient systems, designs & appliances	22%	26%	22%	23%	17%
Using better heating and/or ventilation systems	22%	25%	22%	22%	20%
Improving the insulation level of your home	21%	18%	22%	21%	19%
Using things with less environmental impact	16%	19%	15%	16%	15%
Using more durable materials	13%	18%	15%	11%	11%
Choosing more flexible design options	13%	23%	14%	10%	7%
Choosing cheaper design / product designs	11%	18%	13%	9%	5%
Using more noise-reduction products / systems in interior walls	10%	12%	11%	8%	10%
Adding or enlarging home-office spaces	9%	12%	14%	6%	5%
Changing the design to accommodate additional extended family / multi-generational living arrangements	9%	9%	12%	7%	6%
Changing to a smaller house	8%	8%	6%	11%	6%
Changing to a larger house	6%	11%	8%	3%	1%
Changing from a multi-story to a single-story home design		5%	5%	3%	2%
Choosing more expensive design / product designs	4%	5%	5%	2%	2%
None of these	43%	25%	38%	50%	55%

Changes in the type of work since the COVID-19 pandemic – Businesses and Workers – Sub-groups of relevance

According to Table 22, larger Businesses (annual turnover of more than \$20 M) were significantly more likely to report an increase in *new commercial projects* (36% cf. 26% of all Businesses), *new public sector projects* (34% cf. 23% of all Businesses), *new infrastructure projects* (37% cf. 23% of all Businesses) and *refurbishment / amendment to existing public buildings* (35% cf. 26% of all Businesses). They were also significantly more likely to report less *maintenance / amendment to existing infrastructure* (24% cf. 9% of all Businesses).

Smaller Businesses (annual turnover below \$1 M) were significantly more likely to report an increase in *refurbishment / amendment to existing residential buildings* (59% cf. 51% of all Businesses) and a decrease in the *refurbishment / amendment to existing public buildings* (7% cf. 10% of all Businesses), *New public sector projects* (8% cf. 12% of all Businesses), and *New infrastructure projects* (8% cf. 12% of all Businesses).

Table 22: Changes in the type of work – Businesses (turnover)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
New commercial projects				
<i>Base, n=</i>	1,118	470	443	123
Less of these	14%	11%	14%	28%
No change	36%	39%	37%	27%
More of these	26%	19%	31%	36%
Don't know / not applicable	24%	32%	19%	9%
New residential projects				
<i>Base, n=</i>	1,118	470	443	123
Less of these	11%	9%	9%	26%
No change	33%	36%	32%	26%
More of these	46%	44%	51%	43%
Don't know / not applicable	9%	11%	8%	5%
New public sector projects				
<i>Base, n=</i>	1,118	470	443	123
Less of these	12%	8%	12%	25%
No change	33%	32%	36%	33%
More of these	23%	16%	28%	34%
Don't know / not applicable	32%	45%	24%	7%
New infrastructure projects				
<i>Base, n=</i>	1,118	470	443	123
Less of these	12%	8%	11%	29%
No change	31%	31%	33%	27%
More of these	23%	16%	26%	37%
Don't know / not applicable	34%	46%	30%	7%

Businesses	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Refurbishment / amendment to existing commercial buildings				
<i>Base, n=</i>	1,118	470	443	123
Less of these	11%	8%	11%	24%
No change	35%	33%	38%	33%
More of these	29%	26%	32%	34%
Don't know / not applicable	25%	33%	19%	9%
Refurbishment / amendment to existing residential buildings				
<i>Base, n=</i>	1,118	470	443	123
Less of these	8%	5%	9%	20%
No change	31%	27%	32%	37%
More of these	51%	59%	48%	33%
Don't know / not applicable	11%	9%	11%	9%
Refurbishment / amendment to existing public buildings				
<i>Base, n=</i>	1,118	470	443	123
Less of these	10%	7%	11%	26%
No change	32%	31%	34%	29%
More of these	26%	21%	28%	35%
Don't know / not applicable	32%	41%	27%	10%
Maintenance / amendment to existing infrastructure				
<i>Base, n=</i>	1,118	470	443	123
Less of these	9%	6%	8%	24%
No change	33%	32%	34%	36%
More of these	33%	29%	36%	34%
Don't know / not applicable	25%	33%	22%	7%

According to Table 23, Workers throughout New Zealand were significantly more likely to report an increase in all types of work, except for *new commercial projects* and *new residential projects*. Workers in the Upper North Island were significantly more likely to report no change in *new public sector projects* (40% cf. 34% of all Workers), whilst Workers in the South Island were significantly more likely to report fewer *new commercial projects* (22% cf. 16% of all Workers).

Table 23: Changes in the type of work – Workers (regions)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	WORKER REGIONAL GROUPS				
	Total	Throughout NZ (no specific region)	NETT Upper North Island	NETT Lower North Island	NETT South Island
New commercial projects					
<i>Base, n=</i>	1,038	181	493	190	173
Less of these	16%	16%	15%	14%	22%
No change	32%	31%	31%	37%	30%
More of these	40%	44%	42%	37%	34%
Don't know / not applicable	12%	8%	12%	12%	14%

Workers	Total	Throughout NZ (no specific region)	NETT Upper North Island	NETT Lower North Island	NETT South Island
New residential projects					
<i>Base, n=</i>	1,038	181	493	190	173
Less of these	13%	14%	12%	15%	10%
No change	29%	29%	30%	26%	33%
More of these	46%	51%	46%	44%	42%
Don't know / not applicable	12%	7%	12%	15%	16%
New public sector projects					
<i>Base, n=</i>	1,038	181	493	190	173
Less of these	13%	19%	11%	14%	11%
No change	34%	23%	40%	29%	32%
More of these	38%	50%	33%	42%	39%
Don't know / not applicable	15%	8%	16%	15%	18%
New infrastructure projects					
<i>Base, n=</i>	1,038	181	493	190	173
Less of these	14%	17%	13%	15%	11%
No change	31%	24%	32%	31%	37%
More of these	41%	53%	40%	38%	36%
Don't know / not applicable	14%	6%	15%	16%	16%
Refurbishment / amendment to existing commercial buildings					
<i>Base, n=</i>	1,038	181	493	190	173
Less of these	13%	17%	13%	11%	10%
No change	34%	27%	36%	34%	39%
More of these	39%	48%	37%	41%	34%
Don't know / not applicable	14%	8%	15%	14%	17%
Refurbishment / amendment to existing residential buildings					
<i>Base, n=</i>	1,038	181	493	190	173
Less of these	12%	13%	11%	11%	13%
No change	35%	29%	36%	33%	42%
More of these	40%	52%	38%	43%	32%
Don't know / not applicable	13%	6%	15%	14%	13%
Refurbishment / amendment to existing public sector buildings					
<i>Base, n=</i>	1,038	181	493	190	173
Less of these	11%	15%	10%	13%	8%
No change	35%	26%	39%	32%	40%
More of these	38%	52%	32%	39%	35%
Don't know / not applicable	16%	7%	19%	15%	17%
Maintenance / amendment to existing infrastructure					
<i>Base, n=</i>	1,038	181	493	190	173
Less of these	11%	13%	12%	8%	9%
No change	32%	26%	35%	32%	33%
More of these	43%	52%	40%	45%	40%
Don't know / not applicable	13%	8%	13%	15%	18%

Section 4: Financial, staff and management impacts

Changes in financial aspects of business since the COVID-19 pandemic – Businesses – Sub-groups of relevance

According to Table 24, Businesses operating in the Architecture / Engineering space were significantly more likely to report that *turnover / revenue / sales* had got better (43% cf. 36% of all Businesses), whilst those in the Project Management space were significantly less likely to do so (24% cf. 36% of all Businesses).

Businesses operating in Project Management, Other Construction-Related Services and Retail / Wholesale (29%, 28% and 30% respectively cf. 12% of all Businesses) were significantly more likely to believe that *product costs* had got better.

Businesses operating in Project Management, Manufacturing, Other Construction-Related Services and Retail / Wholesale (31%, 24%, 25% and 29% respectively cf. 14% of all Businesses) were significantly more likely to report that *lines of credit with suppliers* had got better.

Table 24: Changes in financial aspects of business – Businesses (main type of work)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	MAIN TYPE OF WORK BUSINESS DOES						
	Total	Construction	Project Management	Specifier / Architecture / Engineer / Surveyor, etc.	Manufacturing	Other Construction-Related Services	Retail / Wholesale
Turnover / revenue / sales							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	28%	30%	30%	27%	26%	21%	17%
No change	31%	32%	37%	25%	33%	32%	32%
Has got better	36%	35%	24%	43%	37%	36%	40%
Don't know / not applicable	5%	3%	9%	5%	4%	11%	11%
Product costs							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	62%	83%	37%	44%	53%	48%	38%
No change	18%	11%	26%	26%	23%	21%	25%
Has got better	12%	4%	29%	11%	17%	28%	30%
Don't know / not applicable	7%	2%	9%	19%	8%	3%	6%
Overhead costs (e.g. rent, equipment, fees)							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	45%	61%	31%	29%	35%	30%	35%
No change	37%	28%	39%	52%	37%	44%	30%
Has got better	14%	7%	22%	14%	25%	25%	25%
Don't know / not applicable	4%	3%	8%	6%	3%	1%	10%
Profit margins							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	37%	44%	33%	30%	30%	38%	16%
No change	37%	38%	23%	41%	34%	26%	43%
Has got better	22%	16%	33%	22%	31%	31%	37%
Don't know / not applicable	5%	3%	10%	7%	4%	5%	5%

Businesses	Total	Construction	Project Management	Specifier / Architecture / Engineer / Surveyor, etc.	Manufacturing	Other Construction-Related Services	Retail / Wholesale
Debt-servicing costs / interest rates							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	17%	18%	27%	11%	19%	18%	19%
No change	39%	45%	36%	35%	32%	35%	29%
Has got better	27%	23%	30%	27%	38%	33%	35%
Don't know / not applicable	17%	15%	8%	27%	11%	14%	17%
Cashflow management							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	25%	28%	22%	20%	26%	26%	11%
No change	49%	51%	43%	52%	46%	38%	44%
Has got better	22%	18%	27%	21%	24%	32%	37%
Don't know / not applicable	5%	3%	8%	7%	4%	4%	8%
Financial penalties due to delays							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	20%	22%	24%	13%	20%	22%	14%
No change	47%	52%	36%	47%	47%	36%	43%
Has got better	12%	5%	28%	9%	18%	27%	27%
Don't know / not applicable	21%	21%	12%	31%	14%	15%	16%
Speed of invoice payment							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	23%	25%	22%	18%	25%	25%	21%
No change	54%	60%	44%	57%	47%	38%	38%
Has got better	19%	13%	21%	21%	22%	30%	37%
Don't know / not applicable	4%	2%	12%	4%	6%	7%	5%
Lines of credit with suppliers							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	14%	14%	16%	8%	19%	22%	14%
No change	59%	72%	46%	46%	53%	43%	49%
Has got better	14%	7%	31%	11%	24%	25%	29%
Don't know / not applicable	13%	7%	8%	35%	4%	10%	8%
Degree of capital investments being made							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	19%	18%	23%	15%	24%	26%	10%
No change	43%	47%	33%	42%	42%	38%	41%
Has got better	20%	17%	36%	17%	20%	23%	35%
Don't know / not applicable	18%	18%	8%	26%	14%	13%	14%

Businesses	Total	Construction	Project Management	Specifier / Architecture / Engineer / Surveyor, etc.	Manufacturing	Other Construction-Related Services	Retail / Wholesale
Amount of stock inventory held							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	28%	36%	27%	13%	32%	26%	22%
No change	39%	46%	31%	35%	27%	36%	37%
Has got better	17%	11%	29%	11%	38%	26%	33%
Don't know / not applicable	15%	7%	13%	41%	3%	12%	8%
Amount of company debt							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	23%	27%	26%	13%	22%	23%	17%
No change	47%	53%	31%	49%	40%	40%	27%
Has got better	21%	13%	36%	21%	32%	29%	35%
Don't know / not applicable	10%	7%	8%	17%	6%	8%	21%
Compliance costs							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	46%	55%	32%	51%	28%	32%	25%
No change	31%	31%	30%	30%	37%	28%	25%
Has got better	15%	6%	33%	11%	27%	31%	33%
Don't know / not applicable	9%	8%	4%	8%	9%	9%	16%
Financial disputes with clients							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	17%	17%	22%	14%	26%	20%	10%
No change	57%	67%	34%	56%	41%	46%	54%
Has got better	14%	6%	31%	14%	24%	25%	27%
Don't know / not applicable	11%	10%	12%	15%	10%	9%	10%
Freight costs							
Base, n=	1,118	518	90	245	93	100	63
Has got worse	58%	76%	40%	39%	57%	43%	44%
No change	18%	15%	23%	20%	22%	23%	21%
Has got better	13%	4%	30%	13%	17%	24%	32%
Don't know / not applicable	11%	5%	7%	29%	4%	10%	3%

According to Table 25, Businesses with an annual turnover of more than \$20 M were significantly more likely to report that most aspects had improved since the COVID-19 pandemic hit, in contrast with Businesses with an annual turnover below \$1 M, who were significantly less likely to do so.

Table 25: Changes in financial aspects of business – Businesses (turnover)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Turnover / revenue / sales				
Base, n=	1,118	470	443	123
Has got worse	28%	31%	23%	29%
No change	31%	32%	32%	23%
Has got better	36%	33%	40%	42%
Don't know / not applicable	5%	4%	5%	6%
Product costs				
Base, n=	1,118	470	443	123
Has got worse	62%	68%	62%	44%
No change	18%	15%	18%	25%
Has got better	12%	8%	15%	26%
Don't know / not applicable	7%	9%	5%	5%
Overhead costs (e.g. rent, equipment, fees)				
Base, n=	1,118	470	443	123
Has got worse	45%	43%	50%	36%
No change	37%	41%	32%	36%
Has got better	14%	10%	16%	24%
Don't know / not applicable	4%	6%	2%	4%
Profit margins				
Base, n=	1,118	470	443	123
Has got worse	37%	37%	39%	32%
No change	37%	39%	35%	33%
Has got better	22%	19%	24%	30%
Don't know / not applicable	5%	5%	3%	5%
Debt-servicing costs / interest rates				
Base, n=	1,118	470	443	123
Has got worse	17%	18%	14%	29%
No change	39%	39%	43%	26%
Has got better	27%	22%	30%	37%
Don't know / not applicable	17%	21%	13%	7%
Cashflow management				
Base, n=	1,118	470	443	123
Has got worse	25%	26%	21%	29%
No change	49%	49%	51%	41%
Has got better	22%	19%	26%	23%
Don't know / not applicable	5%	6%	2%	7%
Financial penalties due to delays				
Base, n=	1,118	470	443	123
Has got worse	20%	17%	21%	25%
No change	47%	46%	51%	36%
Has got better	12%	9%	12%	30%
Don't know / not applicable	21%	29%	16%	9%

Businesses	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Speed of invoice payment				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	23%	22%	21%	29%
No change	54%	58%	55%	37%
Has got better	19%	16%	20%	28%
Don't know / not applicable	4%	4%	3%	7%
Lines of credit with suppliers				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	14%	11%	15%	24%
No change	59%	62%	61%	37%
Has got better	14%	8%	17%	30%
Don't know / not applicable	13%	20%	7%	8%
Degree of capital investments being made				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	19%	15%	17%	32%
No change	43%	43%	47%	36%
Has got better	20%	16%	25%	27%
Don't know / not applicable	18%	26%	11%	6%
Amount of stock inventory held				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	28%	24%	30%	35%
No change	39%	46%	35%	29%
Has got better	17%	10%	22%	32%
Don't know / not applicable	15%	20%	12%	4%
Amount of company debt				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	23%	24%	21%	26%
No change	47%	48%	49%	29%
Has got better	21%	16%	24%	36%
Don't know / not applicable	10%	13%	5%	9%
Compliance costs				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	46%	49%	48%	35%
No change	31%	29%	31%	31%
Has got better	15%	9%	17%	33%
Don't know / not applicable	9%	13%	4%	2%
Financial disputes with clients				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	17%	16%	15%	30%
No change	57%	60%	61%	32%
Has got better	14%	9%	16%	30%
Don't know / not applicable	11%	14%	7%	8%

Businesses	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Freight costs				
Base, n=	1,118	470	443	123
Has got worse	58%	59%	61%	45%
No change	18%	18%	17%	25%
Has got better	13%	7%	15%	25%
Don't know / not applicable	11%	16%	7%	5%

What business has done to manage costs – Businesses – Sub-groups of relevance

According to Table 26, last year, Senior Managers / Decision-Makers were significantly more likely to implement the majority of changes listed below in order to manage costs due to the COVID-19 pandemic. Just 14% reported not doing any of the changes listed (cf. 34% of all Business respondent types). On the other hand, Business owners and Independent contractors were significantly less likely to implement the majority of changes listed below in order to manage costs due to the COVID-19 pandemic. In total, 41% of Business owners and 52% of Independent contractors reported not doing any of the changes listed (cf. 34% of all Business respondent types).

Table 26: What business has done to manage costs – Last year – Businesses (respondent type)

Businesses – Last year (i.e. 12 months ago) <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS RESPONDENT TYPE			
	Total	Business owner	Senior manager / decision-maker	Independent contractor
Base, n=	1,118	663	356	99
Reducing operational overheads (e.g. travel, capital purchases, rent, etc.)	30%	31%	32%	21%
Cancelling planned pay rises	21%	19%	28%	15%
Asking staff to work reduced hours	20%	14%	33%	13%
Cancelling bonus / extra payments	20%	17%	27%	11%
Asking staff to take paid annual leave	16%	12%	28%	7%
Cutting wages / salary for managers in the business	16%	12%	25%	8%
Making staff redundant	15%	12%	23%	8%
Negotiating new terms with lender / investor	15%	13%	19%	10%
Offering fixed-term contracts instead of permanent roles	14%	10%	22%	8%
Reducing rent / rates payments	13%	13%	17%	5%
Cutting wages / salary for non-management staff	12%	8%	20%	8%
Asking staff to take unpaid leave / furlough	9%	6%	18%	3%
Asking staff to work unpaid	8%	6%	14%	1%
None of the above	34%	41%	14%	52%

According to Table 27, The Senior Manager / Decision-Maker group was also currently more likely to be enforcing the actions listed in order to manage costs. Just 27% reported doing none of these (cf. 44% of all Business respondent types).

Table 27: What business has done to manage costs – Currently – Businesses (respondent type)

Businesses – Currently <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS RESPONDENT TYPE			
	Total	Business owner	Senior manager / decision-maker	Independent contractor
<i>Base, n=</i>	1,118	663	356	99
Reducing operational overheads (e.g. travel, capital purchases, rent, etc.)	23%	22%	23%	25%
Cancelling planned pay rises	15%	13%	21%	8%
Cancelling bonus / extra payments	14%	12%	19%	9%
Negotiating new terms with lender / investor	12%	10%	18%	4%
Offering fixed-term contracts instead of permanent roles	11%	9%	18%	5%
Reducing rent / rates payments	11%	9%	16%	4%
Cutting wages / salary for managers in the business	10%	9%	14%	8%
Asking staff to work reduced hours	10%	8%	16%	6%
Asking staff to take paid annual leave	10%	6%	19%	6%
Making staff redundant	9%	7%	14%	5%
Cutting wages / salary for non-management staff	8%	5%	13%	9%
Asking staff to take unpaid leave / furlough	7%	5%	13%	4%
Asking staff to work unpaid	6%	4%	10%	5%
None of the above	44%	52%	27%	52%

Forms of financial support currently using – Businesses – Sub-groups of relevance

Table 28 shows that Business Owners were significantly more likely to not be using any financial support listed below (59% cf. 52% of all Business respondent types), whereas Senior Managers / Decision-Makers were significantly less likely to not be using any financial support listed below (37% cf. 52% of all Business respondent types).

Table 28: Forms of financial support currently using – Businesses (respondent type)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS RESPONDENT TYPE			
	Total	Business owner	Senior manager / decision-maker	Independent contractor
<i>Base, n=</i>	1,118	663	356	99
Small Business Cashflow Loan Scheme	23%	24%	22%	20%
Leave Support Scheme (used to be COVID-19 Essential Workers Leave Support)	16%	8%	32%	11%
Other tax relief options (e.g. changes to UOMI [Use of Money Interest] remittance, provisional tax thresholds, small assets write-off rules & building depreciation rules)	16%	12%	23%	12%
Business Finance Guarantee Scheme	11%	8%	17%	10%
Non-government business support (e.g. from councils, chambers of commerce, industry associations, etc.)	9%	7%	14%	7%
Loss Carry-Back Scheme	7%	6%	10%	4%
None of these	52%	59%	37%	61%

According to Table 29, Businesses with an annual turnover below \$1 M were significantly less likely to claim financial support via the *Leave Support Scheme*, *Business Finance Guarantee Scheme*, *non-government business support* or *other tax relief* options. Businesses with an annual turnover of more than \$20 M were significantly more likely to use all of these.

Table 29: Forms of financial support currently using – Businesses (turnover)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Base, n=	1,118	470	443	123
Small Business Cashflow Loan Scheme	23%	22%	25%	23%
Leave Support Scheme (used to be COVID-19 Essential Workers Leave Support)	16%	9%	20%	38%
Other tax relief options (e.g. changes to UOMI [Use of Money Interest] remittance, provisional tax thresholds, small assets write-off rules & building depreciation rules)	16%	9%	18%	37%
Business Finance Guarantee Scheme	11%	6%	12%	30%
Non-government business support (e.g. from councils, chambers of commerce, industry associations, etc.)	9%	4%	11%	27%
Loss Carry-Back Scheme	7%	5%	7%	21%
None of these	52%	63%	45%	23%

Changes in management aspects of business since the COVID-19 pandemic – Businesses – Sub-groups of relevance

According to Table 30, *Ease of project management and getting usual work done* and *ease of future planning / forecasting* had been a struggle for 46% and 43% respectively of Business Owners since the COVID-19 pandemic (cf. 43% and 37% respectively of all Business respondent types). In contrast, Senior Managers / Decision-Makers were significantly more likely to state that *ease of project management and getting usual work done* had got better (22% cf. 14% of all Business respondent types) and significantly less likely to report that *ease of future planning / forecasting* had got worse (29% cf. 37% of all Business respondent types). They were also significantly more likely to report improvements for *ease of retaining existing clients / customers* (28% cf. 21% of all Business respondent types), *number of costly, problematic project completion delays* (21% cf. 12% of all Business respondent types) and *project cancellations* (22% cf. 14% of all Business respondent types).

Table 30: Changes in management aspects of business – Businesses (respondent type)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS RESPONDENT TYPE			
	Total	Business owner	Senior manager / decision-maker	Independent contractor
Ease of securing new work				
Base, n=	1,118	663	356	99
Has got worse	23%	21%	25%	27%
No change	42%	44%	37%	40%
Has got better	32%	32%	33%	24%
Don't know / not applicable	4%	2%	6%	8%

Businesses	Total	Business owner	Senior manager / decision-maker	Independent contractor
Ease of project management & getting usual work done				
<i>Base, n=</i>	1,118	663	356	99
Has got worse	41%	46%	34%	28%
No change	40%	39%	40%	45%
Has got better	14%	10%	22%	13%
Don't know / not applicable	5%	5%	4%	13%
Ease of retaining existing clients / customers				
<i>Base, n=</i>	1,118	663	356	99
Has got worse	16%	16%	19%	7%
No change	59%	65%	47%	69%
Has got better	21%	17%	28%	19%
Don't know / not applicable	4%	3%	6%	5%
Number of costly, problematic project completion delays				
<i>Base, n=</i>	1,118	663	356	99
Has got worse	42%	45%	37%	38%
No change	35%	35%	36%	32%
Has got better	12%	8%	21%	5%
Don't know / not applicable	11%	12%	6%	24%
Number of project cancellations				
<i>Base, n=</i>	1,118	663	356	99
Has got worse	27%	28%	26%	27%
No change	51%	56%	44%	42%
Has got better	14%	10%	22%	12%
Don't know / not applicable	7%	6%	7%	18%
Ease of future planning / forecasting				
<i>Base, n=</i>	1,118	663	356	99
Has got worse	37%	43%	29%	32%
No change	37%	35%	39%	37%
Has got better	20%	16%	27%	20%
Don't know / not applicable	6%	5%	6%	10%
Range of goods & services offered				
<i>Base, n=</i>	1,118	663	356	99
Has got worse	24%	24%	26%	24%
No change	52%	57%	46%	46%
Has got better	18%	14%	27%	15%
Don't know / not applicable	5%	5%	2%	14%
'Pipeline' of future confirmed work				
<i>Base, n=</i>	1,118	663	356	99
Has got worse	24%	24%	23%	23%
No change	36%	36%	38%	31%
Has got better	36%	37%	35%	35%
Don't know / not applicable	4%	3%	3%	10%

Businesses	Total	Business owner	Senior manager / decision-maker	Independent contractor
Disputes around work quality with clients				
Base, n=	1,118	663	356	99
Has got worse	15%	13%	19%	11%
No change	63%	70%	50%	58%
Has got better	14%	9%	24%	14%
Don't know / not applicable	8%	8%	6%	17%
Disputes around work timeframes with clients				
Base, n=	1,118	663	356	99
Has got worse	35%	37%	30%	30%
No change	42%	44%	38%	44%
Has got better	14%	9%	26%	8%
Don't know / not applicable	9%	10%	6%	17%

Table 31 shows, Businesses with an annual turnover of more than \$20 M were significantly more likely to report that *ease of project management and getting usual work done* (24% cf. 14% of all Businesses), *ease of retaining existing clients / customers* (30% cf. 21% of all Businesses), the *number of costly, problematic project completion delays* (28% cf. 12% of all Businesses) and the *number of project cancellations* (28% cf. 14% of all Businesses) had improved.

The *'pipeline' of future confirmed work* was significantly less likely to have worsened for Businesses with an annual turnover of \$1–\$20 M (19% cf. 24% of all Businesses).

Table 31: Changes in management aspects of business – Businesses (turnover)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Ease of securing new work				
Base, n=	1,118	470	443	123
Has got worse	23%	22%	23%	27%
No change	42%	44%	41%	32%
Has got better	32%	30%	35%	35%
Don't know / not applicable	4%	4%	2%	7%
Ease of project management & getting usual work done				
Base, n=	1,118	470	443	123
Has got worse	41%	40%	44%	37%
No change	40%	43%	37%	34%
Has got better	14%	10%	17%	24%
Don't know / not applicable	5%	7%	2%	6%
Ease of retaining existing clients / customers				
Base, n=	1,118	470	443	123
Has got worse	16%	14%	15%	27%
No change	59%	64%	59%	37%
Has got better	21%	17%	23%	30%
Don't know / not applicable	4%	4%	2%	6%

Businesses	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Number of costly, problematic project completion delays				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	42%	43%	44%	37%
No change	35%	34%	36%	32%
Has got better	12%	7%	14%	28%
Don't know / not applicable	11%	16%	7%	3%
Number of project cancellations				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	27%	28%	28%	27%
No change	51%	56%	50%	39%
Has got better	14%	9%	17%	28%
Don't know / not applicable	7%	8%	6%	6%
Ease of future planning / forecasting				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	37%	38%	39%	34%
No change	37%	37%	36%	36%
Has got better	20%	17%	23%	24%
Don't know / not applicable	6%	8%	2%	6%
Range of goods & services offered				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	24%	22%	24%	36%
No change	52%	56%	52%	33%
Has got better	18%	14%	21%	29%
Don't know / not applicable	5%	8%	2%	2%
'Pipeline' of future confirmed work				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	24%	28%	19%	28%
No change	36%	36%	37%	28%
Has got better	36%	32%	42%	39%
Don't know / not applicable	4%	4%	2%	5%
Disputes around work quality with clients				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	15%	12%	14%	25%
No change	63%	69%	64%	37%
Has got better	14%	9%	16%	33%
Don't know / not applicable	8%	11%	5%	5%
Disputes around work timeframes with clients				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	35%	35%	35%	39%
No change	42%	43%	43%	30%
Has got better	14%	10%	16%	25%
Don't know / not applicable	9%	12%	6%	6%

Changes in management aspects of business since the COVID-19 pandemic – Workers – Sub-groups of relevance

According to Table 32, those on a fixed salary were significantly more likely to believe that most management aspects of business since the COVID-19 pandemic had improved. Those on fixed-price contracts were significantly more likely to feel as though things had got easier, with the *ease of project management and getting usual work done* (50% cf. 32% of all Workers), *number of costly, problematic project completion delays* (56% cf. 33% of all Workers), *ease of future planning / forecasting* (47% cf. 32% of all Workers), *range of goods and services offered* (50% cf. 34% of all Workers) and *disputes around work quality with clients* (46% cf. 31% of all Workers) all thought to have improved since the COVID-19 pandemic.

Table 32: Changes in management aspects of business – Workers (payment type)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	PAYMENT TYPE				
	Total	I am on a fixed salary	I am paid by the hour	I am paid according to fixed-price contracts	I am paid another way
Ease of securing new work					
<i>Base, n=</i>	1,038	452	495	72	19*
Has got worse	19%	19%	19%	19%	26%
No change	33%	33%	35%	26%	21%
Has got better	37%	41%	34%	46%	16%
Don't know / not applicable	10%	7%	12%	8%	37%
Ease of project management & getting usual work done					
<i>Base, n=</i>	1,038	452	495	72	19*
Has got worse	21%	23%	22%	8%	11%
No change	35%	32%	38%	29%	26%
Has got better	32%	39%	24%	50%	11%
Don't know / not applicable	12%	6%	16%	12%	53%
Ease of retaining existing clients / customers					
<i>Base, n=</i>	1,038	452	495	72	19*
Has got worse	14%	15%	14%	8%	11%
No change	42%	39%	46%	42%	37%
Has got better	34%	41%	26%	44%	11%
Don't know / not applicable	10%	5%	14%	6%	42%
Number of costly, problematic project completion delays					
<i>Base, n=</i>	1,038	452	495	72	19*
Has got worse	26%	27%	27%	11%	16%
No change	30%	27%	34%	26%	21%
Has got better	33%	40%	23%	56%	32%
Don't know / not applicable	11%	7%	15%	7%	32%
Number of project cancellations					
<i>Base, n=</i>	1,038	452	495	72	19*
Has got worse	22%	26%	20%	15%	21%
No change	37%	31%	41%	43%	26%
Has got better	28%	34%	22%	35%	21%
Don't know / not applicable	13%	9%	18%	7%	32%

Workers	Total	I am on a fixed salary	I am paid by the hour	I am paid according to fixed-price contracts	I am paid another way
Ease of future planning / forecasting					
Base, n=	1,038	452	495	72	19*
Has got worse	22%	25%	21%	11%	16%
No change	33%	29%	37%	36%	21%
Has got better	32%	36%	26%	47%	21%
Don't know / not applicable	13%	10%	16%	6%	42%
Range of goods & services offered					
Base, n=	1,038	452	495	72	19*
Has got worse	19%	19%	21%	11%	21%
No change	37%	37%	37%	32%	32%
Has got better	34%	38%	28%	50%	21%
Don't know / not applicable	10%	6%	14%	7%	26%
'Pipeline' of future confirmed work					
Base, n=	1,038	452	495	72	19*
Has got worse	17%	19%	17%	10%	5%
No change	30%	24%	36%	35%	21%
Has got better	42%	49%	35%	43%	37%
Don't know / not applicable	11%	7%	13%	12%	37%
Disputes around work quality with clients					
Base, n=	1,038	452	495	72	19*
Has got worse	16%	17%	17%	10%	5%
No change	41%	40%	42%	36%	42%
Has got better	31%	35%	26%	46%	21%
Don't know / not applicable	12%	8%	15%	8%	32%
Disputes around work timeframes with clients					
Base, n=	1,038	452	495	72	19*
Has got worse	22%	23%	22%	19%	16%
No change	34%	30%	38%	42%	5%
Has got better	32%	38%	27%	33%	37%
Don't know / not applicable	12%	10%	13%	6%	42%

***Caution:** Low base size, results indicative only.

What management has done to manage costs – Workers – Sub-groups of relevance

Last year, Senior-Level Employees were significantly more likely to have *reduced operational overheads* (32% cf. 24% of all Workers), *cut wages / salaries for non-management staff* (24% cf. 18% of all Workers) and *reduced rent / rates payments* (20% cf. 14% of all Workers) (see Table 33).

Table 33: What management has done to manage cost – Last year – Workers (respondent type)

Workers – Last year (i.e. 12 months ago) <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	WORKER RESPONDENT TYPE				
	Total	Middle- / lower-level employee	Senior-level employee	Middle- / lower-level manager	Apprentice
Base, n=	1,038	535	222	160	121
Asking staff to work reduced hours	27%	26%	30%	28%	23%
Reducing operational overheads (e.g. travel, capital purchases, rent, etc.)	24%	22%	32%	28%	12%
Asking staff to take paid annual leave	22%	21%	26%	26%	16%
Cancelling bonus / extra payments	22%	21%	23%	27%	14%
Making staff redundant	21%	20%	23%	22%	20%
Cancelling planned pay rises	20%	20%	22%	24%	15%
Offering fixed-term contracts instead of permanent roles	19%	24%	16%	16%	11%
Cutting wages / salary for managers in the business	18%	19%	18%	20%	9%
Cutting wages / salary for non-management staff	18%	16%	24%	21%	9%
Asking staff to take unpaid leave / furlough	18%	18%	22%	14%	15%
Negotiating new terms with lender / investor	15%	15%	17%	21%	6%
Reducing rent / rates payments	14%	14%	20%	12%	6%
Asking staff to work unpaid	13%	14%	12%	13%	9%
None of the above	20%	19%	14%	15%	45%

According to Table 34, Senior-Level Employees were significantly more likely to currently *reduce their operational overheads* (26% cf. 20% of all Workers). Apprentices were significantly more likely to experience none of the cost management measures (56% cf. 28% of all Workers).

Table 34: What management has done to manage cost – Currently – Workers (respondent type)

Workers – Currently <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	WORKER RESPONDENT TYPE				
	Total	Middle- / lower-level employee	Senior-level employee	Middle- / lower-level manager	Apprentice
Base, n=	1,038	535	222	160	121
Reducing operational overheads (e.g. travel, capital purchases, rent, etc.)	20%	19%	26%	20%	12%
Cancelling bonus / extra payments	16%	17%	14%	21%	11%
Asking staff to work reduced hours	16%	15%	19%	20%	14%
Asking staff to take paid annual leave	16%	16%	20%	16%	7%
Offering fixed-term contracts instead of permanent roles	16%	19%	13%	16%	9%
Cancelling planned pay rises	15%	16%	13%	19%	9%
Cutting wages / salary for non-management staff	13%	15%	15%	12%	7%
Making staff redundant	13%	13%	16%	16%	7%

Workers – Currently	Total	Middle- / lower-level employee	Senior-level employee	Middle- / lower-level manager	Apprentice
Base, n=	1,038	535	222	160	121
Asking staff to take unpaid leave / furlough	12%	13%	15%	12%	7%
Negotiating new terms with lender / investor	12%	13%	11%	17%	9%
Cutting wages / salary for managers in the business	12%	11%	15%	13%	7%
Reducing rent / rates payments	12%	13%	10%	14%	7%
Asking staff to work unpaid	10%	11%	10%	9%	7%
None of the above	28%	25%	23%	22%	56%

Financial and project management impacts – End-Users – Sub-groups of relevance

According to Table 35, Build and Renovation Delayers were significantly more likely to believe that it was *easier to get tradespeople to provide quotes for the work* (both at 13% cf. 7% of all End-Users). These groups were also significantly more likely to think that the *number of costly, problematic project completion delays* had improved (13% and 8% respectively cf. 4% of all End-Users).

Table 35: Financial and project management impacts – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Ease of getting tradespeople to provide quotes for the work					
Base, n=	1,700	115	385	90	110
Has got worse	49%	30%	45%	32%	51%
No change	32%	40%	39%	40%	23%
Has got better	7%	9%	6%	13%	13%
Don't know / not applicable	12%	22%	10%	14%	14%
Ease of getting tradespeople to do the work					
Base, n=	1,700	115	385	90	110
Has got worse	52%	37%	49%	33%	52%
No change	28%	30%	35%	39%	21%
Has got better	7%	11%	5%	18%	9%
Don't know / not applicable	13%	22%	11%	10%	18%
Number of costly, problematic project completion delays					
Base, n=	1,700	115	385	90	110
Has got worse	46%	37%	29%	44%	41%
No change	32%	35%	48%	31%	25%
Has got better	4%	5%	2%	13%	8%
Don't know / not applicable	19%	23%	21%	11%	26%
Ability to plan future building / renovating work					
Base, n=	1,700	115	385	90	110
Has got worse	38%	28%	31%	32%	40%
No change	39%	43%	45%	42%	35%
Has got better	7%	10%	6%	19%	11%
Don't know / not applicable	16%	20%	18%	7%	14%

Homeowners were significantly more likely to report that all the aspects had got worse (see Table 36).

Table 36: Financial and project management impacts – End-Users (planners and homeowners)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP			
	Total	Build planners	Renovation planners	Home-owners
Ease of getting tradespeople to provide quotes for the work				
<i>Base, n=</i>	1,700	165	335	500
Has got worse	49%	41%	54%	58%
No change	32%	35%	29%	25%
Has got better	7%	13%	5%	4%
Don't know / not applicable	12%	11%	12%	13%
Ease of getting tradespeople to do the work				
<i>Base, n=</i>	1,700	165	335	500
Has got worse	52%	46%	53%	63%
No change	28%	30%	27%	20%
Has got better	7%	12%	7%	4%
Don't know / not applicable	13%	12%	13%	12%
Number of costly, problematic project completion delays				
<i>Base, n=</i>	1,700	165	335	500
Has got worse	46%	46%	41%	65%
No change	32%	27%	37%	18%
Has got better	4%	9%	4%	1%
Don't know / not applicable	19%	18%	19%	17%
Ability to plan future building / renovating work				
<i>Base, n=</i>	1,700	165	335	500
Has got worse	38%	32%	33%	51%
No change	39%	41%	49%	28%
Has got better	7%	13%	4%	3%
Don't know / not applicable	16%	14%	14%	18%

Changes in staff aspects of business since the COVID-19 pandemic – Businesses – Sub-groups of relevance

Businesses with an annual turnover of more than \$20 M were significantly more likely to state that the *ease of retaining suitable staff* (37% cf. 27% all Businesses), *pay rates* (30% cf. 18% all Businesses) and the *number of staff working overtime / long hours* (28% cf. 19% all Businesses) had worsened. However, they were significantly more likely to report that all aspects had got better rather than worse, except *pay rates* and *work–life balance*.

Half of Businesses with an annual turnover of \$1–\$20 M were significantly more likely to state that the *ease of finding suitable staff from New Zealand* had got worse (51% cf. 42% of all Businesses). However, they were significantly more likely to find the *Ease of getting suitable staff from overseas* has got worse (37% cf. 30% of all Businesses).

Table 37: Changes in staff aspects of business – Businesses (turnover)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Pay rates				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	18%	16%	18%	30%
No change	47%	46%	47%	40%
Has got better	27%	23%	33%	28%
Don't know / not applicable	8%	15%	2%	2%
Ease of finding suitable staff from New Zealand				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	42%	33%	51%	46%
No change	29%	27%	30%	24%
Has got better	14%	11%	16%	25%
Don't know / not applicable	15%	29%	3%	5%
Ease of retaining suitable staff				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	27%	21%	31%	37%
No change	42%	42%	44%	26%
Has got better	18%	13%	23%	28%
Don't know / not applicable	13%	24%	2%	8%
Number of staff overtime / long hours worked				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	19%	16%	19%	28%
No change	52%	49%	57%	44%
Has got better	17%	12%	21%	26%
Don't know / not applicable	12%	24%	3%	2%
Workplace mental well-being				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	32%	29%	34%	36%
No change	42%	44%	42%	34%
Has got better	19%	16%	21%	28%
Don't know / not applicable	7%	11%	2%	2%

Businesses	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Number of downtime / under-utilised staff				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	23%	23%	24%	24%
No change	47%	43%	51%	46%
Has got better	19%	12%	22%	28%
Don't know / not applicable	12%	22%	3%	2%
Work-life balance				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	31%	31%	31%	36%
No change	41%	40%	43%	32%
Has got better	24%	23%	25%	30%
Don't know / not applicable	4%	6%	1%	2%
Ability to work flexibly (e.g. hours / places worked)				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	12%	11%	12%	26%
No change	49%	54%	48%	30%
Has got better	33%	27%	37%	40%
Don't know / not applicable	6%	9%	3%	4%
Ability to keep staff trained to a suitable skill level				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	17%	13%	19%	31%
No change	54%	50%	60%	39%
Has got better	18%	14%	20%	28%
Don't know / not applicable	11%	22%	1%	2%
Staff with sufficient numeracy & literacy skills to do their role				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	18%	16%	19%	28%
No change	50%	45%	55%	41%
Has got better	15%	11%	18%	26%
Don't know / not applicable	16%	29%	8%	4%
Ability to upskill staff's technological capability				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	13%	10%	13%	28%
No change	53%	51%	61%	33%
Has got better	22%	17%	24%	35%
Don't know / not applicable	12%	22%	2%	3%
Physical safety at work				
<i>Base, n=</i>	1,118	470	443	123
Has got worse	8%	5%	7%	24%
No change	60%	66%	61%	34%
Has got better	27%	20%	30%	39%
Don't know / not applicable	5%	9%	1%	2%

Businesses	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Ease of getting suitable staff from overseas				
Base, n=	1,118	470	443	123
Has got worse	30%	20%	37%	38%
No change	21%	17%	24%	24%
Has got better	12%	6%	12%	35%
Don't know / not applicable	38%	57%	28%	2%

Changes in staff aspects of business since the COVID-19 pandemic -- Workers – Sub-groups of relevance

According to Table 38, those with a personal income of less than \$50,000 were significantly less likely to believe that the following aspects had got better: *number of overtime / long hours worked* (25% cf. 32% of all Workers), *workplace mental well-being* (28% cf. 35% of all Workers), *ability to get training / upskilling* (29% cf. 37% of all Workers), *overall working conditions* (28% cf. 36% of all Workers) and *work–life balance* (26% cf. 37% of all Workers).

In contrast, those with personal incomes of more than \$100,000 were significantly more likely to think that almost all aspects had improved; as such, we can conclude that higher-paid workers are experiencing better post-COVID-19 conditions than lower-paid workers.

Table 38: Changes in staff aspects of business – Workers (personal income)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	PERSONAL INCOME				
	Total	NETT <\$50,000	NETT \$50,001– \$100,000	\$100,001– \$150,000	>\$150,001
Pay rate					
Base, n=	1,038	268	425	205	63
Has got worse	15%	16%	14%	15%	19%
No change	40%	44%	45%	30%	27%
Has got better	38%	33%	36%	51%	52%
Don't know / not applicable	6%	6%	6%	4%	2%
Number of overtime / long hours worked					
Base, n=	1,038	268	425	205	63
Has got worse	21%	23%	22%	20%	8%
No change	41%	45%	43%	35%	37%
Has got better	32%	25%	28%	43%	54%
Don't know / not applicable	6%	7%	6%	2%	2%
Workplace mental well-being					
Base, n=	1,038	268	425	205	63
Has got worse	22%	22%	26%	17%	19%
No change	37%	41%	37%	32%	27%
Has got better	35%	28%	32%	49%	51%
Don't know / not applicable	6%	9%	5%	2%	3%

Workers	Total	NETT <\$50,000	NETT \$50,001– \$100,000	\$100,001– \$150,000	>\$150,001
Amount of time 'wasted' not being able to do the work you plan to do					
<i>Base, n=</i>	1,038	268	425	205	63
Has got worse	22%	22%	25%	17%	13%
No change	39%	41%	43%	32%	32%
Has got better	33%	27%	27%	49%	52%
Don't know / not applicable	6%	9%	5%	2%	3%
Ability to work flexibly (e.g. hours / places worked)					
<i>Base, n=</i>	1,038	268	425	205	63
Has got worse	15%	13%	16%	16%	16%
No change	38%	44%	40%	27%	24%
Has got better	41%	34%	38%	55%	57%
Don't know / not applicable	7%	9%	6%	3%	3%
Ability to get training / upskilling					
<i>Base, n=</i>	1,038	268	425	205	63
Has got worse	16%	15%	16%	14%	17%
No change	40%	45%	45%	28%	30%
Has got better	37%	29%	32%	57%	48%
Don't know / not applicable	8%	11%	7%	2%	5%
Physical safety at work					
<i>Base, n=</i>	1,038	268	425	205	63
Has got worse	11%	11%	11%	14%	11%
No change	44%	48%	48%	35%	30%
Has got better	38%	33%	36%	47%	56%
Don't know / not applicable	7%	8%	6%	3%	3%
Overall working conditions					
<i>Base, n=</i>	1,038	268	425	205	63
Has got worse	14%	13%	15%	15%	13%
No change	42%	50%	45%	32%	32%
Has got better	36%	28%	35%	50%	51%
Don't know / not applicable	7%	9%	6%	3%	5%
Overall work-life balance					
<i>Base, n=</i>	1,038	268	425	205	63
Has got worse	20%	22%	22%	16%	14%
No change	37%	44%	39%	25%	27%
Has got better	37%	26%	34%	57%	56%
Don't know / not applicable	6%	9%	5%	2%	3%
Job security					
<i>Base, n=</i>	1,038	268	425	205	63
Has got worse	17%	17%	17%	16%	13%
No change	41%	43%	45%	34%	32%
Has got better	35%	29%	33%	46%	52%
Don't know / not applicable	7%	10%	4%	3%	3%

Workers	Total	NETT <\$50,000	NETT \$50,001– \$100,000	\$100,001– \$150,000	>\$150,001
Ability to use skills at work					
<i>Base, n=</i>	1,038	268	425	205	63
Has got worse	11%	11%	11%	10%	17%
No change	41%	41%	47%	32%	29%
Has got better	41%	38%	37%	53%	51%
Don't know / not applicable	7%	9%	6%	5%	3%
Autonomy at work (ability to self-manage)					
<i>Base, n=</i>	1,038	268	425	205	63
Has got worse	11%	10%	12%	9%	14%
No change	41%	42%	45%	35%	29%
Has got better	40%	37%	38%	53%	52%
Don't know / not applicable	8%	11%	6%	3%	5%
Normal working hours were reduced (which impacted income)					
<i>Base, n=</i>	1,038	268	425	205	63
Has got worse	17%	19%	16%	14%	19%
No change	46%	48%	50%	35%	33%
Has got better	30%	26%	25%	48%	46%
Don't know / not applicable	8%	7%	8%	2%	2%

Section 5: Industry observations / compliance

Business practices heard of / implemented in the past 12 months due to the COVID-19 pandemic – Businesses – Sub-groups of relevance

Senior Managers / Decision-Makers were overall significantly more likely to hear about other Businesses engaging in most of these practices than implementing them themselves.

According to Table 39, Business Owners were significantly less likely to hear about *workers being asked to work overtime* (14% cf. 18% of all Business respondent types), *workers being unable to take leave / breaks* (11% cf. 14% of all Business respondent types) and *workers having to work outside their visa conditions* (10% cf. 13% of all Business respondent types).

Independent contractors were significantly less likely to hear about Businesses *stockpiling products* (30% cf. 41% of all Business respondent types) and more likely to not hear of any of these (38% cf. 24% of all Business respondent types).

Table 39: Heard-of business practices in the past 12 months – Businesses (respondent type)

Businesses – Have heard about other Businesses doing this <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS RESPONDENT TYPE			
	Total	Business owner	Senior manager / decision-maker	Independent contractor
Base, n=	1,118	663	356	99
Stockpiling / ordering more products than needed	41%	46%	36%	30%
Not being able to follow all the COVID-19 pandemic health & safety protocols (e.g. physical distancing)	27%	26%	29%	28%
Workers being asked to complete tasks outside their skill set	24%	21%	31%	22%
Workers “cutting corners” due to work pressures	24%	21%	30%	18%
Products being substituted without approval (e.g. without client / council approval)	22%	23%	21%	15%
Workers being asked to work more than the hours they were paid for	18%	14%	26%	18%
Workers being paid “under the table”	17%	14%	22%	21%
Reducing / deducting pay from workers	17%	15%	22%	13%
Workers not having the health & safety equipment needed for their usual work	16%	14%	21%	14%
Workers being unable to take leave and/or meal / rest breaks	14%	11%	20%	14%
Workers having to work outside their visa conditions	13%	10%	19%	16%
Workers being paid less than the minimum wage	13%	10%	16%	14%
None of these	24%	26%	16%	38%

According to Table 40, Business Owners were significantly less likely to *ask workers to work overtime* (6% cf. 9% of all Business respondent types), *prevent workers from taking leave / breaks* (5% cf. 9% of all Business respondent types) and *reduce / deduct pay from workers* (6% cf. 9% of all Business respondent types).

Independent Contractors were significantly less likely to *ask workers to complete tasks outside their skill set* (5% cf. 12% of all Business respondent types) or *substitute products without approval* (2% cf. 9% of all Business respondent types).

More than half of Independent Contractors (60%) and Business Owners (53%) did not engage in any of these activities (cf. 47% of all Business respondent types). In contrast, just 31% of Senior Managers / Decision-Makers stated the same thing.

Table 40: Implemented business practices in the past 12 months – Businesses (respondent type)

Businesses – Have done in your business <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS RESPONDENT TYPE			
	Total	Business owner	Senior manager / decision-maker	Independent contractor
Base, n=	1,118	663	356	99
Stockpiling / ordering more products than needed	22%	21%	24%	19%
Not being able to follow all the COVID-19 health & safety protocols (e.g. physical distancing)	14%	13%	16%	12%
Workers being asked to complete tasks outside their skill set	12%	10%	19%	5%
Workers “cutting corners” due to work pressures	10%	8%	13%	9%
Workers being unable to take leave and/or meal / rest breaks	9%	5%	16%	8%
Workers being asked to work more than the hours they were paid for	9%	6%	15%	6%
Products being substituted without approval (e.g. without client / council approval)	9%	7%	14%	2%
Reducing / deducting pay from workers	9%	6%	15%	4%
Workers not having the health & safety equipment needed for their usual work	8%	6%	13%	6%
Workers being paid less than the minimum wage	8%	5%	12%	6%
Workers having to work outside their visa conditions	7%	6%	11%	3%
Workers being paid “under the table”	6%	4%	9%	6%
None of these	47%	53%	31%	60%

Table 41 shows Businesses with an annual turnover of more than \$20 M were overall significantly more likely to hear about other Businesses engaging in most of these practices, while those with a turnover under \$1 M were significantly more likely to not hear of other Businesses doing *any of these* (31% cf. 24% of all Businesses). This may well reflect that larger businesses tend to have a broader perspective of their industry.

Table 41: Heard-of business practices in the past 12 months – Businesses (turnover)

Businesses – Have heard about other Businesses doing this <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Base, n=	1,118	470	443	123
Stockpiling / ordering more products than needed	41%	42%	44%	37%
Not being able to follow all the COVID-19 health & safety protocols (e.g. physical distancing)	27%	27%	28%	28%
Workers being asked to complete tasks outside their skill set	24%	20%	28%	27%
Workers “cutting corners” due to work pressures	24%	23%	23%	28%
Products being substituted without approval (e.g. without client / council approval)	22%	20%	23%	26%

Businesses – Have heard about other Businesses doing this	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
<i>Base, n=</i>	1,118	470	443	123
Workers being asked to work more than the hours they were paid for	18%	15%	19%	28%
Workers being paid “under the table”	17%	16%	17%	25%
Reducing / deducting pay from workers	17%	12%	20%	26%
Workers not having the health & safety equipment needed for their usual work	16%	11%	17%	28%
Workers being unable to take leave and/or meal / rest breaks	14%	12%	14%	25%
Workers having to work outside their visa conditions	13%	10%	14%	24%
Workers being paid less than the minimum wage	13%	9%	14%	23%
None of these	24%	31%	17%	7%

According to Table 42, Businesses with an annual turnover of more than \$20 M were significantly more likely to have implemented almost all the practices below, in contrast to those with an annual turnover below

\$1 M. Businesses with an annual turnover of \$1–\$20 M were significantly more likely to *ask workers to complete tasks outside their skill set* (16% cf. 12% of all Businesses).

Table 42: Implemented business practices in past 12 months – Businesses (turnover)

Businesses – Have done in your business <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
<i>Base, n=</i>	1,118	470	443	123
Stockpiling / ordering more products than needed	22%	18%	26%	25%
Not being able to follow all the COVID-19 health & safety protocols (e.g. physical distancing)	14%	13%	15%	22%
Workers being asked to complete tasks outside their skill set	12%	7%	16%	19%
Workers “cutting corners” due to work pressures	10%	6%	11%	23%
Workers being unable to take leave and/or meal / rest breaks	9%	6%	9%	26%
Workers being asked to work more than the hours they were paid for	9%	5%	10%	25%
Products being substituted without approval (e.g. without client / council approval)	9%	5%	12%	17%
Reducing / deducting pay from workers	9%	4%	12%	18%
Workers not having the health & safety equipment needed for their usual work	8%	5%	10%	19%
Workers being paid less than the minimum wage	8%	3%	9%	24%
Workers having to work outside their visa conditions	7%	4%	8%	18%
Workers being paid “under the table”	6%	3%	7%	12%
None of these	47%	62%	36%	16%

Business practices heard of / experienced in the past 12 months due to the COVID-19 pandemic – Workers – Sub-groups of relevance

Table 43 shows Workers aged 15–29 years were significantly more likely to report hearing of others *being unable to follow COVID-19 health and safety measures* (31% cf. 23% of all Workers), *being asked to work overtime* (30% cf. 23% of all Workers), *being unable to take leave / breaks* (33% cf. 23% of all Workers), *having to “cut corners” due to work pressures* (30% cf. 23% of all Workers) and *not having proper health and safety equipment* (29% cf. 20% of all Workers).

Those aged 50–69 years were significantly more likely to hear of *none of these* being experienced by others (40% cf. 22% of all Workers). This indicates a worrying situation where younger workers, who may be less likely to speak up for themselves, may be experiencing less acceptable working conditions than older workers.

Table 43: Heard-of business practices in the past 12 months – Workers (age groups)

Workers – Have heard of other people experiencing this <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	WORKER AGE GROUPS			
	Total	15–29 years	30–49 years	50–69 years
Base, n=	1,038	352	584	97
Being expected to complete tasks outside their skill set	24%	27%	23%	20%
Being unable to follow the COVID-19 health & safety measures (e.g. physical distancing)	23%	31%	21%	12%
Being asked to work more than the hours paid for	23%	30%	20%	18%
Being unable to take leave and/or meal / rest breaks	23%	33%	16%	22%
Having to “cut corners” due to work pressures	23%	30%	19%	19%
Having pay reduced / deducted without their approval	20%	24%	18%	18%
Not having the health & safety equipment needed for the usual work	20%	29%	15%	20%
Being asked to stockpile / order more products than needed	18%	22%	16%	14%
Being asked to use substituted products without approval (e.g. without client / council approval)	17%	20%	16%	15%
Being paid “under the table”	16%	21%	14%	10%
Being paid less than the minimum wage	16%	19%	14%	12%
Being asked to work outside visa conditions	12%	11%	13%	13%
None of these	22%	14%	23%	40%

Note: Base size too low to report results for the 70+ age group.

According to Table 44, Workers aged 15–29 years were significantly more likely to experience *being unable to take leave / breaks* (21% cf. 16% of all Workers) and *having to “cut corners” due to work pressures* (20% cf. 14% of all Workers).

Those aged 50–69 years were significantly less likely to be *unable to follow COVID-19 health and safety measures* (9% cf. 18% of all Workers) or *be paid less than the minimum wage* (3% cf. 10% of all Workers).

Table 44: Experienced business practices in the past 12 months – Workers (age groups)

Workers – Have experienced myself <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	WORKER AGE GROUPS			
	Total	15–29 years	30–49 years	50–69 years
Base, n=	1,038	352	584	97
Being expected to complete tasks outside their skill set	18%	19%	19%	15%
Being unable to follow the COVID-19 health & safety measures (e.g. physical distancing)	18%	17%	19%	9%
Being unable to take leave and/or meal / rest breaks	16%	21%	13%	18%
Being asked to work more than the hours paid for	16%	20%	14%	16%
Having to “cut corners” due to work pressures	14%	20%	11%	13%
Being asked to stockpile / order more products than needed	13%	15%	13%	7%
Having pay reduced / deducted without their approval	12%	13%	11%	15%
Not having the health & safety equipment needed for the usual work	12%	15%	9%	15%
Being asked to use substituted products without approval (e.g. without client / council approval)	11%	13%	12%	5%
Being paid less than the minimum wage	10%	12%	9%	3%
Being paid “under the table”	9%	12%	8%	7%
Being asked to work outside visa conditions	9%	9%	9%	6%
None of these	33%	30%	32%	46%

Note: Base size too low to report results for the 70+ age group.

Table 45 shows female Workers were more likely to hear of others *being asked to work overtime* (30% cf. 23% of all Workers), *being unable to take leave / breaks* (28% cf. 23% of all Workers) and *having their pay reduced / deducted without their approval* (27% cf. 20% of all Workers).

There were no statistically significant differences between the genders when personal experience of such practices was examined.

Table 45: Business practices in the past 12 months – Workers (gender)

Workers – Have heard of other people experiencing this <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	WORKER GENDER		
	Total	Female	Male
Base, n=	1,038	323	697
Being expected to complete tasks outside their skill set	24%	26%	23%
Being unable to follow the COVID-19 health & safety measures (e.g. physical distancing)	23%	25%	22%
Being asked to work more than the hours paid for	23%	30%	20%
Being unable to take leave and/or meal / rest breaks	23%	28%	19%
Having to “cut corners” due to work pressures	23%	23%	22%
Having pay reduced / deducted without their approval	20%	27%	16%
Not having the health & safety equipment needed for the usual work	20%	19%	20%
Being asked to stockpile / order more products than needed	18%	21%	17%

Workers – Have heard of other people experiencing this	Total	Female	Male
Being asked to use substituted products without approval (e.g. without client / council approval)	17%	20%	16%
<i>Base, n=</i>	<i>1,038</i>	<i>323</i>	<i>697</i>
Being paid "under the table"	16%	17%	16%
Being paid less than the minimum wage	16%	16%	15%
Being asked to work outside visa conditions	12%	12%	12%
None of these	22%	19%	23%

Business practices implemented in the past 12 months due to the COVID-19 pandemic occurring more / less often – Businesses – Sub-groups of relevance

Businesses in Construction were significantly more likely to report that most practices (except for those related to Workers' payment) occurred more often (see Table 46).

Table 46: Business practices implemented in the past 12 months occurring more / less often – Businesses (main type of work) (I)

Businesses (Only those indicating changes had been implemented / observed were asked each question) <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	MAIN TYPE OF WORK BUSINESS DOES			
	Total	Construction	Project Management	Specifier / Architecture / Engineer / Surveyor, etc.
Workers being paid less than the minimum wage				
<i>Base, n=</i>	<i>190</i>	<i>66</i>	<i>23*</i>	<i>30*</i>
More often	37%	48%	39%	27%
Less often	31%	12%	39%	53%
No change	23%	24%	22%	17%
Don't know / unsure	8%	15%	0%	3%
Workers being unable to take leave and/or meal / rest breaks				
<i>Base, n=</i>	<i>211</i>	<i>69</i>	<i>26*</i>	<i>39*</i>
More often	47%	68%	35%	38%
Less often	26%	9%	38%	41%
No change	23%	16%	23%	15%
Don't know / unsure	5%	7%	4%	5%
Workers not having the health & safety equipment needed for their usual work				
<i>Base, n=</i>	<i>233</i>	<i>101</i>	<i>26*</i>	<i>31*</i>
More often	43%	55%	38%	45%
Less often	25%	14%	42%	23%
No change	28%	28%	15%	29%
Don't know / unsure	3%	3%	4%	3%
Workers being asked to work more than the hours they were paid for				
<i>Base, n=</i>	<i>256</i>	<i>85</i>	<i>29*</i>	<i>61</i>
More often	52%	60%	59%	54%
Less often	22%	12%	28%	16%
No change	19%	16%	14%	23%
Don't know / unsure	7%	12%	0%	7%

Businesses (Only those indicating changes had been implemented / observed were asked each question)	Total	Construc- tion	Project Manage- ment	Specifier / Architecture / Engineer / Surveyor, etc.
Workers being paid “under the table”				
<i>Base, n=</i>	221	98	26*	29*
More often	39%	49%	42%	28%
Less often	22%	8%	19%	41%
No change	30%	29%	38%	28%
Don't know / unsure	9%	14%	0%	3%
Workers “cutting corners” due to work pressures				
<i>Base, n=</i>	316	155	22*	58
More often	57%	68%	41%	57%
Less often	19%	11%	45%	17%
No change	21%	17%	14%	22%
Don't know / unsure	4%	4%	0%	3%
Workers having to work outside their visa conditions				
<i>Base, n=</i>	201	67	26*	35*
More often	43%	60%	35%	37%
Less often	30%	18%	35%	29%
No change	20%	12%	27%	31%
Don't know / unsure	6%	10%	4%	3%
Products being substituted without approval (e.g. without client / council approval)				
<i>Base, n=</i>	293	117	23*	78
More often	59%	70%	43%	64%
Less often	17%	9%	35%	10%
No change	17%	13%	17%	22%
Don't know / unsure	6%	8%	4%	4%
Reducing / deducting pay from workers				
<i>Base, n=</i>	241	91	24*	64
More often	44%	53%	38%	39%
Less often	23%	14%	25%	27%
No change	21%	14%	29%	22%
Don't know / unsure	12%	19%	8%	12%
Workers being asked to complete tasks outside their skill set				
<i>Base, n=</i>	325	167	29*	44*
More often	63%	72%	52%	68%
Less often	14%	5%	28%	14%
No change	20%	19%	17%	16%
Don't know / unsure	3%	4%	3%	2%
Stockpiling / ordering more products than needed				
<i>Base, n=</i>	534	284	33*	97
More often	75%	89%	48%	73%
Less often	13%	4%	30%	16%
No change	9%	5%	18%	8%
Don't know / unsure	3%	2%	3%	2%

***Caution:** Low base size, results indicative only.

According to Table 47, Retail / Wholesale Businesses were significantly more likely to believe that *workers being paid less than the minimum wage* (56% cf. 31% of all Businesses), *workers not having the health and safety equipment needed* (50% cf. 25% of all Businesses) and *workers having to work outside their visa conditions* (55% cf. 30% of all Businesses) were occurring less often.

Businesses in Other Construction-Related Services were significantly more likely to believe that *workers being asked to work overtime* (53% cf. 22% of all Businesses), *workers “cutting corners” due to work pressures* (38% cf. 19% of all Businesses) and *products being substituted without approval* (33% cf. 17% of all Businesses) were occurring less often.

Businesses in Manufacturing, Other Construction-Related Services and Retail / Wholesale (58%, 39% and 55% respectively cf. 75% of all Businesses) were significantly less likely to believe that *stockpiling / ordering more products than needed* was occurring more often.

Please note the base sizes for all these groups are small and should be regarded as indicative only.

Table 47: Business practices implemented in the past 12 months occurring more / less often – Businesses (main type of work) (II)

Businesses (Only those indicating changes had been implemented / observed were asked each question) <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	MAIN TYPE OF WORK BUSINESS DOES			
	Total	Manufacturing	Other Construction-Related Services	Retail / Wholesale
Workers being paid less than the minimum wage				
<i>Base, n=</i>	190	30*	23*	18*
More often	37%	23%	48%	22%
Less often	31%	43%	13%	56%
No change	23%	30%	30%	11%
Don't know / unsure	8%	3%	9%	11%
Workers being unable to take leave and/or meal / rest breaks				
<i>Base, n=</i>	211	27*	35*	20*
More often	47%	33%	43%	30%
Less often	26%	38%	29%	20%
No change	23%	29%	26%	50%
Don't know / unsure	5%	0%	3%	0%
Workers not having the health & safety equipment needed for their usual work				
<i>Base, n=</i>	233	27*	30*	16*
More often	43%	22%	43%	12%
Less often	25%	33%	30%	50%
No change	28%	44%	23%	25%
Don't know / unsure	3%	0%	3%	12%
Workers being asked to work more than the hours they were paid for				
<i>Base, n=</i>	256	23*	34*	23*
More often	52%	43%	35%	39%
Less often	22%	35%	53%	13%
No change	19%	22%	9%	39%
Don't know / unsure	7%	0%	3%	9%

Businesses (Only those indicating changes had been implemented / observed were asked each question)	Total	Manufacturing	Other Construction-Related Services	Retail / Wholesale
Workers being paid “under the table”				
<i>Base, n=</i>	221	26*	25*	16*
More often	39%	31%	28%	25%
Less often	22%	38%	40%	25%
No change	30%	23%	24%	50%
Don't know / unsure	9%	8%	8%	0%
Workers “cutting corners” due to work pressures				
<i>Base, n=</i>	316	26*	32*	21*
More often	57%	50%	31%	33%
Less often	19%	15%	38%	29%
No change	21%	27%	25%	33%
Don't know / unsure	4%	8%	6%	5%
Workers having to work outside their visa conditions				
<i>Base, n=</i>	201	23*	29*	20*
More often	43%	30%	52%	15%
Less often	30%	43%	31%	55%
No change	20%	22%	14%	25%
Don't know / unsure	6%	4%	3%	5%
Products being substituted without approval (e.g. without client / council approval)				
<i>Base, n=</i>	293	23*	33*	17*
More often	59%	39%	39%	41%
Less often	17%	30%	33%	29%
No change	17%	26%	12%	29%
Don't know / unsure	6%	4%	15%	0%
Reducing / deducting pay from workers				
<i>Base, n=</i>	241	27*	20*	15*
More often	44%	41%	30%	33%
Less often	23%	33%	40%	20%
No change	21%	22%	30%	40%
Don't know / unsure	12%	4%	0%	7%
Workers being asked to complete tasks outside their skill set				
<i>Base, n=</i>	325	30*	30*	24*
More often	63%	43%	57%	29%
Less often	14%	23%	33%	29%
No change	20%	30%	10%	38%
Don't know / unsure	3%	3%	0%	4%
Stockpiling / ordering more products than needed				
<i>Base, n=</i>	534	48*	41*	29*
More often	75%	58%	39%	55%
Less often	13%	21%	37%	24%
No change	9%	19%	15%	14%
Don't know / unsure	3%	2%	10%	7%

***Caution:** Low base size, results indicative only.

Things experienced during building / renovation in the past 12 months – End-Users – Sub-groups of relevance

Table 48 shows Current / Recent Builders were significantly more likely to report having *disputes around the quality of the work* (15% cf. 4% of all End-Users) and that *the work had to / will be redone due to quality* (15% cf. 8% of all End-Users).

Similarly, Current / Recent Renovators were significantly more likely to *have disputes around the quality of the work* (11% cf. 4% of all End-Users), *have the work redone due to quality* (12% cf. 8% of all End-Users) and *accept a verbal quote without anything being written down* (15% cf. 8% of all End-Users). Despite this, of all End-User groups, they were significantly more likely to have experienced *none of these things* (42% cf. 30% of all End-Users).

Table 48: Things experienced during building / renovation in the past 12 months – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Base, n=	1,700	115	385	90	110
Spending more than the initially estimated budget for your project	42%	29%	28%	40%	32%
You had / will have to agree to using substituted products as the specified products are not available	32%	24%	14%	24%	19%
Tradespeople adding costs to your project, claiming that these were / are due to COVID-19	31%	10%	11%	33%	28%
Disputes around the project delivery dates	25%	22%	13%	33%	17%
You were / will be offered special "cash rates" for your job	10%	6%	10%	10%	12%
You asked / will ask for special "cash rates" for your job	8%	6%	6%	9%	9%
The work had to / will be redone because you were not happy about the quality of the work	8%	15%	12%	n/a	n/a
You accepted / will accept a verbal quote, without anything being written down	8%	10%	15%	11%	12%
You charged / will charge penalties / got discounts from tradespeople working on your project due to delays arising from COVID-19	6%	6%	4%	13%	5%
Disputes around the quality of the work	4%	15%	11%	n/a	n/a
None of these	30%	33%	42%	20%	31%

According to Table 49, Renovation Planners and Homeowners were significantly more likely to *spend more than the initially estimated budget* (48% and 52% respectively cf. 42% of all End-Users).

Homeowners were also significantly more likely to *agree to using substituted products due to availability* (48% cf. 32% of all End-Users), *have costs added by tradespeople* (50% cf. 31% of all End-Users) and *have disputes around project delivery dates* (34% cf. 25% of all End-Users)

Build Planners were significantly more likely to *agree to using substituted products* (40% cf. 32% of all End-Users), *have costs added by tradespeople* (41% cf. 31% of all End-Users), *have disputes around project delivery dates* (35% cf. 25% of all End-Users) and *have work redone due to quality* (14% cf. 8% of all End-Users).

Table 49: Things experienced during building / renovation in the past 12 months – End-Users (planners and homeowners)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP			
	Total	Build planners	Renovation planners	Home-owners
Base, n=	1,700	165	335	500
Spending more than the initially estimated budget for your project	42%	45%	48%	52%
You had / will have to agree to using substituted products as the specified products are not available	32%	40%	36%	48%
Tradespeople adding costs to your project, claiming that these were / are due to COVID-19	31%	41%	29%	50%
Disputes around the project delivery dates	25%	35%	21%	34%
You were / will be offered special "cash rates" for your job	10%	9%	9%	11%
You asked / will ask for special "cash rates" for your job	8%	8%	10%	10%
The work had to / will be redone because you were not happy about the quality of the work	8%	14%	4%	8%
You accepted / will accept a verbal quote, without anything being written down	8%	7%	4%	4%
You charged / will charge penalties / got discounts from tradespeople working on your project due to delays arising from COVID-19	6%	7%	2%	9%
Disputes around the quality of the work	4%			
None of these	30%	22%	27%	25%

Impressions of the New Zealand residential building sector – End-Users – Sub-groups of relevance

According to Table 50, Build Delayers were significantly more likely to agree that *tradespeople will “cut corners” to save time / money* (27% cf. 17% of all End-Users). No significant different was found between Build Planners, Renovation Planners, and Home owners regarding these parameters (see Table 51).

Table 50: Impressions of the New Zealand residential building sector – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Most tradespeople will “cut corners” to save time / money					
<i>Base, n=</i>	1,700	115	385	90	110
NETT Disagree (1–2)	15%	14%	17%	18%	11%
NETT Neutral (3–5)	59%	55%	59%	51%	57%
NETT Agree (6–7)	17%	19%	17%	27%	20%
Don't know / not applicable	8%	12%	6%	4%	12%
Most tradespeople offer good value for money					
<i>Base, n=</i>	1,700	115	385	90	110
NETT Disagree (1–2)	9%	10%	9%	10%	7%
NETT Neutral (3–5)	66%	57%	66%	66%	71%
NETT Agree (6–7)	19%	23%	21%	19%	15%
Don't know / not applicable	6%	10%	4%	6%	7%
People can have trust & confidence in their tradespeople to get the job done well					
<i>Base, n=</i>	1,700	115	385	90	110
NETT Disagree (1–2)	7%	5%	7%	12%	7%
NETT Neutral (3–5)	63%	54%	63%	62%	69%
NETT Agree (6–7)	25%	33%	27%	21%	19%
Don't know / not applicable	5%	8%	3%	4%	5%
Most tradespeople will comply with the necessary regulations & standards					
<i>Base, n=</i>	1,700	115	385	90	110
NETT Disagree (1–2)	4%	3%	4%	7%	5%
NETT Neutral (3–5)	46%	43%	47%	54%	55%
NETT Agree (6–7)	45%	44%	45%	34%	36%
Don't know / not applicable	5%	9%	4%	4%	4%

Table 51: Impressions of the New Zealand residential building sector – End-Users (planners and homeowners)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP			
	Total	Build planners	Renovation planners	Homeowners
Most tradespeople will 'cut corners' to save time or money				
<i>Base, n=</i>	1,700	165	335	500
NETT Disagree (1–2)	15%	12%	14%	17%
NETT Neutral (3–5)	59%	63%	59%	59%
NETT Agree (6–7)	17%	22%	17%	14%
Don't know / not applicable	8%	3%	10%	10%
Most tradespeople offer good value for money				
<i>Base, n=</i>	1,700	165	335	500
NETT Disagree (1–2)	9%	10%	11%	7%
NETT Neutral (3–5)	66%	65%	69%	65%
NETT Agree (6–7)	19%	21%	16%	20%
Don't know / not applicable	6%	5%	4%	8%
People can have trust & confidence in their tradespeople to get the job done well				
<i>Base, n=</i>	1,700	165	335	500
NETT Disagree (1–2)	7%	6%	5%	8%
NETT Neutral (3–5)	63%	61%	67%	63%
NETT Agree (6–7)	25%	28%	24%	22%
Don't know / not applicable	5%	4%	4%	7%
Most tradespeople will comply with the necessary regulations & standards				
<i>Base, n=</i>	1,700	165	335	500
NETT Disagree (1–2)	4%	2%	3%	3%
NETT Neutral (3–5)	46%	48%	42%	46%
NETT Agree (6–7)	45%	45%	50%	44%
Don't know / not applicable	5%	4%	4%	7%

Impressions of the New Zealand residential building sector increased / decreased due to the COVID-19 pandemic – End-Users – Sub-groups of relevance

Table 52 shows Build Delayers were significantly more likely to state that *tradespeople “cutting corners” to save time or money* had decreased due to the COVID-19 pandemic (13% cf. 7% of all End-Users), while for 65% of Current / Recent Renovators there was no change (cf. 56% of all End-Users).

Build Delayers were significantly more likely to believe that *tradespeople offering good value for money* (27% cf. 12% of all End-Users) and *people being able to have trust and confidence in their tradespeople to get the job done well* (18% cf. 10% of all End-Users) had increased due to the COVID-19 pandemic. They were, however, also significantly more likely to report that *tradespeople complying with the necessary regulations and standards* had decreased due to the COVID-19 pandemic (21% cf. 13% of all End-Users).

Renovation Delayers were significantly more likely to report *trust and confidence in tradespeople to get the job done well* as having decreased due to the COVID-19 pandemic (29% cf. 21% of all End-Users).

Table 52: Impressions of the New Zealand residential building sector increased / decreased – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Tradespeople “cutting corners” to save time / money					
<i>Base, n=</i>	1,700	115	385	90	110
This has decreased due to COVID-19	7%	8%	5%	13%	6%
No change	56%	57%	65%	51%	48%
This has increased due to COVID-19	30%	25%	23%	30%	37%
Don't know / not applicable	8%	10%	6%	6%	8%
Tradespeople offering good value for money					
<i>Base, n=</i>	1,700	115	385	90	110
This has decreased due to COVID-19	29%	27%	27%	24%	37%
No change	54%	52%	59%	48%	47%
This has increased due to COVID-19	12%	12%	10%	27%	12%
Don't know / not applicable	4%	9%	3%	1%	4%
People being able to have trust & confidence in their tradespeople to get the job done well					
<i>Base, n=</i>	1,700	115	385	90	110
This has decreased due to COVID-19	21%	19%	19%	24%	29%
No change	66%	62%	71%	53%	58%
This has increased due to COVID-19	10%	13%	8%	18%	7%
Don't know / not applicable	4%	6%	3%	4%	5%
Tradespeople complying with the necessary regulations & standards					
<i>Base, n=</i>	1,700	115	385	90	110
This has decreased due to COVID-19	13%	16%	10%	21%	17%
No change	69%	64%	75%	52%	61%
This has increased due to COVID-19	12%	12%	11%	19%	15%
Don't know / not applicable	6%	8%	5%	8%	7%

Satisfaction with building / renovation project – End-Users – Sub-groups of relevance

Unsurprisingly, Build and Renovation Delayers were significantly more likely to be dissatisfied with their building / renovation projects (28% and 33% respectively cf. 12% of all End-Users), whilst Current / Recent Renovators were significantly more likely to be satisfied (86% cf. 68% of all End-Users) (see Table 53).

Table 53: Satisfaction with building / renovation project – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Base, n=	700	115	385	90	110
Very satisfied	23%	23%	32%	7%	7%
Satisfied	45%	50%	54%	22%	25%
Neither satisfied nor dissatisfied	20%	22%	9%	38%	39%
Dissatisfied	8%	3%	4%	21%	19%
Very dissatisfied	4%	2%	1%	12%	9%
NETT Satisfied (1–2)	68%	74%	86%	29%	33%
NETT Dissatisfied (4–5)	12%	4%	5%	33%	28%

Tenants / Boarders were significantly more likely to be dissatisfied with their building project (27% cf. 12% of all End-Users). We hypothesise this occur because completion delays could have negative implications for their renting / boarding situation, e.g. if they cannot move out when expected (see Table 54).

Table 54: Satisfaction with building / renovation project – End-Users (home ownership status)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER HOME OWNERSHIP STATUS				
	Total	I own / part-own the place where I live	I own / part-own other residential property in NZ	I am a tenant / boarder where I currently live, paying rent / board	I do not own my current place of residence but do not pay rent / board either
Base, n=	700	516	122	113	37*
Very satisfied	23%	25%	24%	15%	22%
Satisfied	45%	48%	49%	30%	46%
Neither satisfied nor dissatisfied	20%	17%	20%	27%	22%
Dissatisfied	8%	7%	4%	19%	8%
Very dissatisfied	4%	3%	2%	9%	3%
NETT Satisfied (1–2)	68%	73%	73%	45%	68%
NETT Dissatisfied (4–5)	12%	10%	7%	27%	11%

***Caution:** Low base size, results indicative only.

Section 6: Business impact

Areas where more help / advice is needed – Businesses – Sub-groups of relevance

According to Table 55, Businesses with an annual turnover of \$1–20 M were significantly more likely to like help / advice with *managing mental well-being* (30% cf. 25% of all Businesses), *managing employee performance* (28% cf. 22% of all Businesses), *training employees* (27% cf. 22% of all Businesses) and *managing workplace health and safety* (22% cf. 18% of all Businesses).

Businesses with an annual turnover of more than \$20 M were significantly more likely to want help / advice with *managing employee performance* (32% cf. 22% of all Businesses) and *research and development* (30% cf. 15% of all Businesses).

Businesses with an annual turnover below \$1 M were significantly more likely to want *no advice / help* (23% cf. 16% of all Businesses).

Table 55: Areas where more help / advice is needed – Businesses (turnover)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Base, n=	1,118	470	443	123
Reducing business costs – reducing compliance cost / minimising tax / margins / increased overheads	28%	27%	29%	32%
Pricing jobs correctly	25%	30%	23%	16%
Managing mental well-being	25%	19%	30%	28%
Adopting new technology	23%	24%	21%	26%
Managing employee performance	22%	15%	28%	32%
Training employees	22%	17%	27%	21%
Managing cashflow	19%	21%	18%	20%
Managing workplace health & safety	18%	14%	22%	20%
Diversifying the business	17%	14%	20%	22%
Marketing & advertising	17%	17%	17%	21%
Understanding building regulations	15%	15%	15%	18%
Research & development	15%	13%	14%	30%
No areas	16%	23%	10%	4%

Greatest negative impact on business / organisation over the next two years – Businesses – Sub-groups of relevance

Table 56 shows Businesses in the Construction industry were significantly more likely to believe *freight costs* (40% cf. 31% of all Businesses), *having preferred products supplied on time* (45% cf. 29% of all Businesses), *cost of products (excluding freight costs)* (41% cf. 29% of all Businesses), *product costs* (44% cf. 28% of all Businesses), *being able to order preferred products* (33% cf. 22% of all Businesses), *ease of finding suitable staff from New Zealand* (29% cf. 22% of all Businesses), *compliance costs* (22% cf. 18% of all Businesses) and *profit margins* (19% cf. 15% of all Businesses) would have a negative impact on their business / organisation over the next two years.

Table 56: Greatest negative impact on business / organisation over the next two years – Businesses (main type of work) (I)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	MAIN TYPE OF WORK BUSINESS DOES			
	Total	Construction	Project Management	Specifier / Architecture / Engineer / Surveyor, etc.
Base, n=	1,072	507	81	234
Freight costs	31%	40%	21%	13%
Having preferred products supplied on time	29%	45%	11%	18%
Cost of products (excl. freight costs)	29%	41%	12%	18%
Product costs	28%	44%	9%	11%
Being able to order preferred products	22%	33%	9%	14%
Ease of finding suitable staff from New Zealand	22%	29%	7%	22%
Compliance costs	18%	22%	6%	22%
Building consents	16%	17%	7%	25%
Profit margins	15%	19%	10%	10%
Ease of retaining suitable staff	13%	16%	12%	9%
Work-life balance	13%	15%	7%	13%
Overhead costs (e.g. rent, equipment, fees)	12%	16%	10%	6%
Number of costly, problematic project completion delays	12%	15%	9%	14%
Building inspections	12%	15%	2%	11%
Cost of tools & other equipment	11%	16%	7%	4%
Ease of future planning / forecasting	10%	12%	4%	15%
Ease of getting suitable staff from overseas	9%	9%	6%	9%
Turnover / revenue / sales	9%	9%	7%	9%
Disputes around work timeframes with clients	9%	9%	7%	9%
Quotes from product suppliers (e.g. wholesalers / retailers)	8%	12%	5%	5%
Workplace mental well-being	8%	8%	9%	8%
Ease of project management & getting usual work done	8%	9%	5%	11%
Number of project cancellations	8%	10%	6%	8%
Speed of invoice payment	8%	10%	2%	9%
Pay rates	8%	10%	11%	4%
'Pipeline' of future confirmed work	8%	8%	2%	11%
Amount of stock inventory held	8%	9%	9%	4%
Quality of products supplied (incl. any substituted products)	7%	8%	5%	5%
Getting titles, drawings & similar council records	7%	8%	5%	6%
Ease of securing new work	7%	8%	2%	9%

Businesses	Total	Construction	Project Management	Specifier / Architecture / Engineer / Surveyor, etc.
Base, n=	1,072	507	81	234
Amount of company debt	6%	8%	2%	6%
Range of goods & services offered	6%	8%	5%	5%
Number of downtime / under-utilised staff	6%	7%	4%	8%
Cashflow management	6%	7%	7%	4%
Staff with sufficient numeracy & literacy skills to do their role	5%	5%	4%	6%
Quotes from service suppliers (e.g. specialist workers)	5%	5%	2%	7%
Ability to keep staff trained to a suitable skill level	5%	6%	4%	4%
Financial penalties due to delays	5%	6%	6%	2%

According to Table 57, Manufacturing, Other Construction-Related Services and Retail / Wholesale Businesses were significantly less likely to report *having preferred products supplied on time* as having the greatest negative impact over the next two years (18%, 15% and 10% respectively cf. 29% of all Businesses).

Table 57: Greatest negative impact on business / organisation over the next two years – Businesses (main type of work) (II)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	MAIN TYPE OF WORK BUSINESS DOES			
	Total	Manufacturing	Other Construction-Related Services	Retail / Wholesale
Base, n=	1,072	88	94	59
Freight costs	31%	31%	33%	36%
Having preferred products supplied on time	29%	18%	15%	10%
Cost of products (excl. freight costs)	29%	20%	21%	10%
Product costs	28%	20%	20%	14%
Being able to order preferred products	22%	15%	15%	7%
Ease of finding suitable staff from New Zealand	22%	18%	9%	12%
Compliance costs	18%	7%	12%	3%
Building consents	16%	5%	15%	12%
Profit margins	15%	9%	14%	10%
Ease of retaining suitable staff	13%	14%	5%	7%
Work-life balance	13%	10%	6%	10%
Overhead costs (e.g. rent, equipment, fees)	12%	9%	17%	8%
Number of costly, problematic project completion delays	12%	3%	3%	10%
Building inspections	12%	3%	12%	5%
Cost of tools & other equipment	11%	10%	7%	5%
Ease of future planning / forecasting	10%	7%	4%	8%
Ease of getting suitable staff from overseas	9%	14%	11%	2%
Turnover / revenue / sales	9%	6%	11%	5%
Disputes around work timeframes with clients	9%	8%	6%	8%
Quotes from product suppliers (e.g. wholesalers / retailers)	8%	2%	10%	3%
Workplace mental well-being	8%	10%	10%	3%
Ease of project management & getting usual work done	8%	8%	4%	2%

Businesses	Total	Manufac- turing	Other Construction- Related Services	Retail / Wholesale
<i>Base, n=</i>	1,072	88	94	59
Number of project cancellations	8%	2%	9%	8%
Speed of invoice payment	8%	1%	6%	5%
Pay rates	8%	6%	9%	10%
'Pipeline' of future confirmed work	8%	6%	6%	5%
Amount of stock inventory held	8%	9%	5%	7%
Quality of products supplied (incl. any substituted products)	7%	2%	10%	3%
Getting titles, drawings & similar council records	7%	2%	4%	3%
Ease of securing new work	7%	0%	3%	3%
Amount of company debt	6%	3%	7%	3%
Range of goods & services offered	6%	5%	2%	2%
Number of downtime / under-utilised staff	6%	2%	5%	3%
Cashflow management	6%	2%	4%	0%
Staff with sufficient numeracy & literacy skills to do their role	5%	8%	4%	5%
Quotes from service suppliers (e.g. specialist workers)	5%	3%	4%	3%
Ability to keep staff trained to a suitable skill level	5%	2%	6%	3%
Financial penalties due to delays	5%	5%	4%	5%

Section 7: Personal impact

Impressions of place of work – Businesses – Sub-groups of relevance

According to Table 58, Businesses with an annual turnover of more than \$20 M were significantly more likely to agree that *there are good structures and programmes to support the mental* (76% cf. 51% of all Businesses) and *physical* (75% cf. 56% of all Businesses) *well-being of staff*.

Businesses with an annual turnover of \$1–\$20 M were significantly more likely to agree that *there are good structures and programmes to support the physical well-being of staff* (63% cf. 56% of all Businesses), *Staff at this workplace always feel physically safe* (77% cf. 71% of all Businesses), *the management enables staff to care for their own well-being* (71% cf. 64% of all Businesses) and that *the management enables staff to care for the well-being of others in their lives* (72% cf. 65% of all Businesses).

Table 58: Impressions of place of work – Businesses (turnover)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
There are good structures & programmes to support the mental well-being of staff				
<i>Base, n=</i>	1,118	470	443	123
NETT Disagree (1–2)	11%	11%	12%	6%
Neutral (3)	26%	25%	32%	16%
NETT Agree (4–5)	51%	41%	54%	76%
Don't know / not applicable	12%	23%	3%	2%
There are good structures & programmes to support the physical well-being of staff				
<i>Base, n=</i>	1,118	470	443	123
NETT Disagree (1–2)	9%	9%	9%	7%
Neutral (3)	23%	23%	25%	16%
NETT Agree (4–5)	56%	46%	63%	75%
Don't know / not applicable	12%	22%	4%	2%
Staff at this workplace always feel physically safe at work				
<i>Base, n=</i>	1,118	470	443	123
NETT Disagree (1–2)	6%	5%	7%	4%
Neutral (3)	14%	13%	14%	22%
NETT Agree (4–5)	71%	66%	77%	74%
Don't know / not applicable	8%	16%	2%	0%
Staff at this workplace always feel emotionally safe at work				
<i>Base, n=</i>	1,118	470	443	123
NETT Disagree (1–2)	6%	6%	7%	6%
Neutral (3)	18%	13%	21%	20%
NETT Agree (4–5)	65%	62%	69%	73%
Don't know / not applicable	10%	19%	2%	2%

Businesses	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
The management enables staff to care for their own well-being				
Base, n=	1,118	470	443	123
NETT Disagree (1–2)	7%	7%	6%	7%
Neutral (3)	20%	18%	21%	21%
NETT Agree (4–5)	64%	56%	71%	71%
Don't know / not applicable	9%	19%	1%	2%
The management enables staff to care for the well-being of others in their lives				
Base, n=	1,118	470	443	123
NETT Disagree (1–2)	6%	4%	8%	7%
Neutral (3)	19%	16%	19%	27%
NETT Agree (4–5)	65%	60%	72%	64%
Don't know / not applicable	10%	20%	1%	2%

Impressions of place of work – Workers – Sub-groups of relevance

Table 59 shows that Senior-Level Employees were significantly more likely to agree that *there are good structures and programmes to support the physical well-being of staff* (66% cf. 59% of all Workers) and *the company genuinely cares for my well-being* (68% cf. 59% of all Workers). Although Apprentices were on the whole much more likely to give positive feedback about their workplaces than negative feedback, they were nonetheless more likely than more senior employees to report negative experiences too. In sum, we see that the majority of Workers are happy with their workplace, but Apprentices are more likely to be experiencing negative situations.

Table 59: Impressions of place of work – Workers (respondent type)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	WORKER RESPONDENT TYPE				
	Total	Middle- / lower-level employee	Senior-level employee	Middle- / lower-level manager	Apprentice
There are good structures & programmes to support the mental well-being of staff					
Base, n=	1,038	535	222	160	121
NETT Disagree (1–2)	14%	13%	14%	12%	23%
Neutral (3)	22%	22%	22%	22%	25%
NETT Agree (4–5)	58%	59%	64%	61%	40%
Don't know / not applicable	5%	5%	1%	5%	12%
There are good structures & programmes to support the physical well-being of staff					
Base, n=	1,038	535	222	160	121
NETT Disagree (1–2)	12%	11%	12%	11%	19%
Neutral (3)	22%	22%	22%	22%	25%
NETT Agree (4–5)	59%	58%	66%	61%	46%
Don't know / not applicable	5%	7%	1%	4%	10%

Workers	Total	Middle- / lower-level employee	Senior-level employee	Middle- / lower-level manager	Apprentice
Staff at this workplace always feel physically safe at work					
<i>Base, n=</i>	1,038	535	222	160	121
NETT Disagree (1–2)	10%	10%	8%	10%	12%
Neutral (3)	21%	21%	22%	21%	21%
NETT Agree (4–5)	64%	64%	67%	66%	55%
Don't know / not applicable	5%	5%	4%	3%	11%
Staff at this workplace always feel emotionally safe at work					
<i>Base, n=</i>	1,038	535	222	160	121
NETT Disagree (1–2)	13%	12%	13%	11%	18%
Neutral (3)	20%	21%	17%	22%	21%
NETT Agree (4–5)	63%	63%	67%	63%	55%
Don't know / not applicable	4%	5%	3%	4%	6%
The management enables staff to care for their own well-being					
<i>Base, n=</i>	1,038	535	222	160	121
NETT Disagree (1–2)	10%	9%	9%	8%	16%
Neutral (3)	21%	22%	20%	21%	21%
NETT Agree (4–5)	65%	65%	71%	68%	51%
Don't know / not applicable	4%	4%	0%	3%	12%
The management enables staff to care for the well-being of others in their lives					
<i>Base, n=</i>	1,038	535	222	160	121
NETT Disagree (1–2)	11%	11%	12%	11%	15%
Neutral (3)	22%	22%	21%	22%	23%
NETT Agree (4–5)	62%	63%	65%	63%	50%
Don't know / not applicable	5%	4%	2%	4%	12%
The company genuinely cares for my well-being					
<i>Base, n=</i>	1,038	535	222	160	121
NETT Disagree (1–2)	12%	12%	9%	11%	21%
Neutral (3)	24%	25%	19%	24%	26%
NETT Agree (4–5)	59%	58%	68%	61%	45%
Don't know / not applicable	5%	5%	4%	4%	9%
My manager genuinely cares for my well-being & acts upon it					
<i>Base, n=</i>	1,038	535	222	160	121
NETT Disagree (1–2)	13%	13%	12%	11%	17%
Neutral (3)	19%	21%	17%	16%	20%
NETT Agree (4–5)	64%	63%	69%	69%	55%
Don't know / not applicable	4%	4%	3%	3%	8%

Workers	Total	Middle- / lower-level employee	Senior-level employee	Middle- / lower-level manager	Apprentice
The company has structures & programmes that ensure my well-being at work is cared for					
<i>Base, n=</i>	1,038	535	222	160	121
NETT Disagree (1–2)	12%	13%	8%	13%	19%
Neutral (3)	22%	23%	24%	19%	20%
NETT Agree (4–5)	61%	60%	66%	64%	48%
Don't know / not applicable	5%	5%	1%	4%	13%
My team members / colleagues care about my well-being					
<i>Base, n=</i>	1,038	535	222	160	121
NETT Disagree (1–2)	9%	9%	11%	10%	9%
Neutral (3)	21%	23%	17%	16%	26%
NETT Agree (4–5)	65%	64%	69%	68%	55%
Don't know / not applicable	5%	4%	3%	6%	10%

Satisfaction with overall experience at work – Businesses – Sub-groups of relevance

According to Table 60, Business owners were significantly more likely to be satisfied with their *overall work experience* (NETT 85% cf. 81% of all Business respondent types), whilst Independent Contractors were significantly more likely to feel neither satisfied nor dissatisfied (29% cf. 17% of all Business respondent types).

Table 60: Satisfaction with overall experience at work – Businesses (respondent type)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS RESPONDENT TYPE			
	Total	Business owner	Senior manager / decision-maker	Independent contractor
<i>Base, n=</i>	1,118	663	356	99
Very satisfied	29%	31%	25%	26%
Satisfied	52%	54%	51%	39%
Neither satisfied nor dissatisfied	17%	13%	21%	29%
Dissatisfied	2%	2%	3%	3%
Very dissatisfied	0%	0%	0%	2%
NETT Satisfied	81%	85%	76%	66%
NETT Dissatisfied	3%	2%	4%	5%

Satisfaction with overall experience at work – Workers – Sub-groups of relevance

Table 61 shows that Workers significantly less likely to be very satisfied with their *overall work experience* were those with personal incomes of less than \$50,000 and \$50,001–\$100,000 (24% and 31% respectively cf. 36% of all Workers), in contrast to those with personal incomes of \$100,000–\$150,000 and more than \$150,000 (62% and 57% respectively cf. 36% of all Workers).

Table 61: Satisfaction with overall experience at work – Workers (personal income)

Workers	PERSONAL INCOME				
	Total	<\$50,000	\$50,001–\$100,000	\$100,001–\$150,000	>\$150,001
Base, n=	1,038	268	425	205	63
Very satisfied	36%	24%	31%	62%	57%
Satisfied	38%	37%	44%	27%	35%
Neither satisfied nor dissatisfied	19%	30%	18%	8%	5%
Dissatisfied	5%	6%	6%	3%	3%
Very dissatisfied	2%	3%	1%	0%	0%
NETT Satisfied	74%	61%	75%	89%	92%
NETT Dissatisfied	7%	9%	7%	3%	3%

According to Table 62, apprentices were significantly less likely to be very satisfied with their *overall work experience* (24% cf. 36% of all Workers).

Table 62: Satisfaction with overall experience at work – Workers (respondent type)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	WORKER RESPONDENT TYPE				
	Total	Middle- / lower-level employee	Senior-level employee	Middle-/ lower-level manager	Apprentice
Base, n=	1,038	535	222	160	121
Very satisfied	36%	36%	39%	42%	24%
Satisfied	38%	40%	38%	36%	35%
Neither satisfied nor dissatisfied	19%	19%	18%	12%	30%
Dissatisfied	5%	4%	5%	9%	7%
Very dissatisfied	2%	1%	1%	1%	5%
NETT Satisfied	74%	76%	77%	78%	59%
NETT Dissatisfied	7%	5%	6%	9%	12%

Negative impact on building / renovation project – End-Users – Sub-groups of relevance

According to Table 63, *Cost of products (including freight costs)* was significantly less likely to have a negative impact on building / renovation projects for Current / Recent Builders and Renovators and Build Delayers (26%, 31% and 23% respectively cf. 40% of all End-Users), and significantly more likely to do so for Build and Renovation Planners (55% each cf. 40% of all End-Users). Renovation Planners were significantly more likely to report *having preferred products supplied on time* as a negative impact on their renovation project (38% cf. 29% of all End-Users).

Table 63: Negative impact on building /renovation project – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP						
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers	Build planners	Renovation planners
Base, n=	1,004	101	312	73	94	137	287
Cost of products (incl. freight costs)	40%	26%	31%	23%	30%	55%	55%
Ease of getting tradespeople to do the work	31%	16%	34%	15%	40%	29%	36%
Having preferred products supplied on time	29%	24%	27%	18%	24%	31%	38%
Being able to order preferred products	24%	15%	21%	14%	26%	34%	28%
Ease of getting tradespeople to provide quotes for the work	23%	10%	23%	19%	28%	18%	28%
Number of costly, problematic project completion delays	13%	16%	12%	19%	16%	18%	8%
Quotes from service suppliers (e.g. specialist workers)	11%	11%	6%	16%	15%	15%	11%
Finance and/or loans approved	11%	19%	4%	26%	9%	20%	7%
Ability to plan future building / renovating work	10%	7%	10%	10%	14%	13%	10%
Building consents	8%	19%	4%	16%	4%	13%	7%
Quotes from product suppliers (e.g. wholesalers / retailers)	7%	9%	3%	14%	12%	9%	8%
Getting titles, drawings & similar council records	5%	13%	2%	12%	5%	7%	3%
Quality of products supplied (incl. any substituted products)	5%	8%	3%	7%	7%	9%	4%
Building inspections	4%	12%	3%	0%	0%	9%	4%
Don't know	5%	8%	3%	1%	4%	5%	7%
None	5%	8%	5%	3%	4%	5%	5%

Impact of COVID-19 on personal circumstances – End-Users – Sub-groups of relevance

Table 64 shows that Build Delayers were significantly more likely to report all aspects as worsening due to the COVID-19 pandemic. Current / Recent Builders were significantly more likely to mention their *employment situation* had improved (14% cf. 8% of all End-Users). Current / Recent Renovators were significantly more likely to report no change in *mental well-being* (65% cf. 59% of all End-Users).

Table 64: Impact of COVID-19 on personal circumstances – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Your financial situation					
<i>Base, n=</i>	1,700	115	385	90	110
Has worsened due to COVID-19	29%	24%	26%	40%	35%
No change	55%	56%	57%	38%	47%
Has improved due to COVID-19	10%	15%	12%	12%	10%
Not applicable	3%	2%	4%	4%	6%
Prefer not to say	2%	3%	1%	6%	1%
Your employment situation					
<i>Base, n=</i>	1,700	115	385	90	110
Has worsened due to COVID-19	17%	13%	14%	33%	25%
No change	59%	55%	62%	42%	47%
Has improved due to COVID-19	8%	14%	9%	14%	8%
Not applicable	14%	17%	14%	6%	16%
Prefer not to say	2%	1%	2%	4%	4%
Your physical well-being					
<i>Base, n=</i>	1,700	115	385	90	110
Has worsened due to COVID-19	18%	19%	16%	29%	25%
No change	66%	63%	68%	50%	53%
Has improved due to COVID-19	10%	8%	10%	14%	15%
Not applicable	4%	6%	4%	4%	7%
Prefer not to say	2%	3%	1%	2%	1%
Your mental well-being					
<i>Base, n=</i>	1,700	115	385	90	110
Has worsened due to COVID-19	27%	30%	20%	46%	35%
No change	59%	50%	65%	33%	45%
Has improved due to COVID-19	8%	10%	8%	16%	10%
Not applicable	3%	5%	5%	2%	5%
Prefer not to say	3%	4%	2%	3%	5%
Changes in your family situation					
<i>Base, n=</i>	1,700	115	385	90	110
Has worsened due to COVID-19	13%	11%	7%	28%	15%
No change	73%	68%	77%	52%	64%
Has improved due to COVID-19	7%	9%	9%	12%	9%
Not applicable	5%	10%	5%	7%	7%
Prefer not to say	2%	3%	2%	1%	5%

According to Table 65, Build Planners were significantly more likely to report a decline in their *financial situation* due to the COVID-19 pandemic (38% cf. 29% of all End-Users). Homeowners were significantly more likely to report no change in most aspects.

Table 65: Impact of COVID-19 on personal circumstances – End-Users (planners and homeowners)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP			
	Total	Build planners	Renovation planners	Home-owners
Your financial situation				
Base, n=	1,700	165	335	500
Has worsened due to COVID-19	29%	38%	30%	26%
No change	55%	44%	56%	63%
Has improved due to COVID-19	10%	15%	9%	6%
Not applicable	3%	2%	3%	3%
Prefer not to say	2%	1%	3%	2%
Your employment situation				
Base, n=	1,700	165	335	500
Has worsened due to COVID-19	17%	21%	17%	15%
No change	59%	59%	65%	58%
Has improved due to COVID-19	8%	13%	5%	5%
Not applicable	14%	6%	12%	20%
Prefer not to say	2%	1%	1%	2%
Your physical well-being				
Base, n=	1,700	165	335	500
Has worsened due to COVID-19	18%	24%	19%	15%
No change	66%	60%	67%	71%
Has improved due to COVID-19	10%	8%	9%	9%
Not applicable	4%	6%	3%	2%
Prefer not to say	2%	2%	2%	2%
Your mental well-being				
Base, n=	1,700	165	335	500
Has worsened due to COVID-19	27%	30%	29%	24%
No change	59%	53%	61%	64%
Has improved due to COVID-19	8%	10%	5%	7%
Not applicable	3%	3%	2%	3%
Prefer not to say	3%	3%	3%	2%
Changes in your family situation				
Base, n=	1,700	165	335	500
Has worsened due to COVID-19	13%	22%	13%	13%
No change	73%	62%	76%	77%
Has improved due to COVID-19	7%	10%	5%	5%
Not applicable	5%	4%	4%	3%
Prefer not to say	2%	1%	2%	2%

Table 66 shows that End-Users with a household income of more than \$150,000 were significantly more likely to report no change in their *financial* (68% cf. 55% of all End-Users), *employment* (75% cf. 59% of all End-Users) and *family* (80% cf. 73% of all End-Users) *situation*. Those with a household income of less than \$50,000 were significantly more likely to report *financial situation* as being worse due to the COVID-19 pandemic (35% cf. 29% of all End-Users).

Table 66: Impact of COVID-19 on personal circumstances – End-Users (household income)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	HH INCOME				
	Total	<\$50,000	\$50,001–\$100,000	\$100,001–\$150,000	>\$150,001
Your financial situation					
<i>Base, n=</i>	1,700	372	568	361	190
Has worsened due to COVID-19	29%	35%	30%	27%	15%
No change	55%	51%	57%	55%	68%
Has improved due to COVID-19	10%	7%	10%	14%	14%
Not applicable	3%	4%	3%	4%	3%
Prefer not to say	2%	3%	1%	1%	1%
Your employment situation					
<i>Base, n=</i>	1,700	372	568	361	190
Has worsened due to COVID-19	17%	17%	20%	17%	12%
No change	59%	44%	59%	65%	75%
Has improved due to COVID-19	8%	6%	10%	9%	7%
Not applicable	14%	29%	11%	9%	5%
Prefer not to say	2%	3%	1%	0%	1%
Your physical well-being					
<i>Base, n=</i>	1,700	372	568	361	190
Has worsened due to COVID-19	18%	19%	18%	20%	17%
No change	66%	65%	66%	65%	70%
Has improved due to COVID-19	10%	9%	11%	11%	10%
Not applicable	4%	6%	4%	3%	3%
Prefer not to say	2%	2%	1%	1%	0%
Your mental well-being					
<i>Base, n=</i>	1,700	372	568	361	190
Has worsened due to COVID-19	27%	23%	29%	28%	27%
No change	59%	62%	57%	58%	64%
Has improved due to COVID-19	8%	9%	10%	7%	7%
Not applicable	3%	4%	3%	4%	2%
Prefer not to say	3%	3%	2%	2%	1%
Changes in your family situation					
<i>Base, n=</i>	1,700	372	568	361	190
Has worsened due to COVID-19	13%	13%	16%	10%	11%
No change	73%	71%	70%	77%	80%
Has improved due to COVID-19	7%	6%	8%	9%	6%
Not applicable	5%	7%	4%	3%	3%
Prefer not to say	2%	2%	2%	1%	0%

Section 8: Future expectations

Things likely to change in New Zealand over the next two years – Businesses – Sub-groups of relevance

According to Table 67, Business owners were significantly more likely to report that the *ease and timeliness of working with councils* would be significantly worse in the next two years (32% cf. 25% of all Business respondent types), whilst Senior Managers / Decision-Makers were significantly more likely to believe that it would be better (28% cf. 18% of all Business respondent types).

When asked about *how risk-adverse banks and lenders will be*, Business owners were significantly more likely to believe that it would be significantly worse in the next two years (28% cf. 22% of all Business respondent types), whilst Senior Managers / Decision-Makers were significantly more likely to believe it would be better (25% cf. 16% of all Business respondent types).

Senior Managers / Decision-Makers were significantly more likely to believe that the *ease and timeliness of working with product suppliers* (29% cf. 21% of all Business respondent types) and *service suppliers* (31% cf. 20% of all Business respondent types) would be significantly better.

Table 67: Things likely to change in New Zealand over the next two years – Businesses (respondent type) (I)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS RESPONDENT TYPE			
	Total	Business owner	Senior manager / decision-maker	Independent contractor
Ease & timeliness of working with councils				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	25%	32%	12%	20%
NETT Neutral (3–5)	47%	44%	53%	42%
NETT Will be significantly better in 2 years (6–7)	18%	12%	28%	15%
Don't know / not applicable	11%	12%	6%	22%
How risk-adverse banks & lenders will be				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	22%	28%	14%	13%
NETT Neutral (3–5)	49%	46%	54%	47%
NETT Will be significantly better in 2 years (6–7)	16%	12%	25%	11%
Don't know / not applicable	13%	14%	6%	28%
Ease & timeliness of working with product suppliers				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	15%	17%	10%	16%
NETT Neutral (3–5)	57%	58%	57%	48%
NETT Will be significantly better in 2 years (6–7)	21%	17%	29%	17%
Don't know / not applicable	8%	8%	4%	18%
Ease & timeliness of working with service suppliers				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	13%	16%	8%	12%
NETT Neutral (3–5)	59%	62%	57%	53%
NETT Will be significantly better in 2 years (6–7)	20%	14%	31%	18%
Don't know / not applicable	8%	9%	3%	17%

In addition, Table 68 shows Business Owners were significantly more likely to believe that their *ability to get preferred products within the required timeframes* (30% cf. 24% of all Business respondent types) and *overall cost of products* (48% cf. 39% of all Business respondent types) would be worse in the next two years, whilst Senior Managers / Decision-Makers were significantly more likely to believe that they would be better (25% cf. 20% and 32% respectively cf. 19% of all Business respondent types).

Table 68: Things likely to change in New Zealand over the next two years – Businesses (respondent type) (II)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS RESPONDENT TYPE			
	Total	Business owner	Senior manager / decision-maker	Independent contractor
Ability to getting preferred products within the required timeframes				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	24%	30%	12%	20%
NETT Neutral (3–5)	50%	45%	59%	49%
NETT Will be significantly better in 2 years (6–7)	20%	18%	25%	18%
Don't know / not applicable	6%	7%	3%	12%
Overall cost of products				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	39%	48%	23%	33%
NETT Neutral (3–5)	38%	34%	43%	43%
NETT Will be significantly better in 2 years (6–7)	19%	13%	32%	18%
Don't know / not applicable	4%	5%	2%	5%
Overall financial performance of your business				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	6%	8%	3%	5%
NETT Neutral (3–5)	61%	63%	61%	56%
NETT Will be significantly better in 2 years (6–7)	27%	25%	32%	24%
Don't know / not applicable	5%	5%	4%	15%
Ease & efficiency of running your business				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	10%	12%	7%	10%
NETT Neutral (3–5)	60%	61%	62%	48%
NETT Will be significantly better in 2 years (6–7)	24%	22%	28%	25%
Don't know / not applicable	5%	4%	3%	16%

Also, Table 69 shows Business Owners were significantly more likely to believe that *availability of suitable staff* (27% cf. 22% of all Business respondent types) and the *quality of building work in the industry* (18% cf. 14% of all Business respondent types) would be significantly worse in the next two years.

Senior Managers / Decision-Makers were significantly more likely to believe that all the aspects below would be significantly better in the next two years.

Table 69: Things likely to change in New Zealand over the next two years – Businesses (respondent type) (III)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	BUSINESS RESPONDENT TYPE			
	Total	Business owner	Senior manager / decision-maker	Independent contractor
Availability of suitable staff				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	22%	27%	13%	18%
NETT Neutral (3–5)	49%	46%	57%	38%
NETT Will be significantly better in 2 years (6–7)	20%	16%	27%	16%
Don't know / not applicable	10%	11%	3%	27%
Ability to retain staff				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	12%	12%	10%	13%
NETT Neutral (3–5)	57%	59%	59%	37%
NETT Will be significantly better in 2 years (6–7)	20%	16%	28%	20%
Don't know / not applicable	11%	13%	3%	29%
Ability to train & invest in staff				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	11%	13%	7%	11%
NETT Neutral (3–5)	58%	59%	59%	43%
NETT Will be significantly better in 2 years (6–7)	21%	16%	32%	17%
Don't know / not applicable	10%	12%	3%	28%
Financial viability of your business				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	6%	7%	4%	8%
NETT Neutral (3–5)	62%	65%	58%	58%
NETT Will be significantly better in 2 years (6–7)	27%	24%	33%	23%
Don't know / not applicable	5%	5%	5%	11%
Quality of building work in the industry				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	14%	18%	8%	13%
NETT Neutral (3–5)	57%	57%	58%	53%
NETT Will be significantly better in 2 years (6–7)	22%	18%	31%	23%
Don't know / not applicable	6%	7%	4%	11%

Table 70 shows, in general, larger Businesses were more optimistic about the future and vice versa.

Businesses with an annual turnover below \$1 M were significantly more likely to believe that the *ease and timeliness of working with councils* (29% cf. 25% of all Businesses) would be significantly worse in two years' time.

Businesses with an annual turnover of more than \$20 M were significantly more likely to believe that *ease and timeliness of working with councils* (45% cf. 18% of all Businesses), *product suppliers* (41% cf. 21% of all Businesses) and *service suppliers* (41% cf. 20% of all Businesses), and *how risk-adverse banks and lenders will be* (39% cf. 16% of all Businesses) would be significantly better in two years' time.

Table 70: Things likely to change in New Zealand over the next two years – Businesses (turnover) (l)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Ease & timeliness of working with councils				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	25%	29%	25%	8%
NETT Neutral (3–5)	47%	43%	48%	46%
NETT Will be significantly better in 2 years (6–7)	18%	11%	19%	45%
Don't know / not applicable	11%	17%	7%	2%
How risk-adverse banks & lenders will be				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	22%	24%	25%	11%
NETT Neutral (3–5)	49%	48%	49%	49%
NETT Will be significantly better in 2 years (6–7)	16%	9%	19%	39%
Don't know / not applicable	13%	20%	7%	2%
Ease & timeliness of working with product suppliers				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	15%	16%	16%	7%
NETT Neutral (3–5)	57%	59%	56%	50%
NETT Will be significantly better in 2 years (6–7)	21%	14%	24%	41%
Don't know / not applicable	8%	12%	4%	2%
Ease & timeliness of working with service suppliers				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	13%	15%	14%	7%
NETT Neutral (3–5)	59%	59%	61%	51%
NETT Will be significantly better in 2 years (6–7)	20%	14%	21%	41%
Don't know / not applicable	8%	12%	5%	2%

Table 71 shows Businesses with an annual turnover below \$1 M were significantly less likely to believe that the *ability to get preferred products within the required timeframes* (14% cf. 20% of all Businesses), *overall cost of products* (11% cf. 19% of all Businesses), *overall financial performance of your business* (21% cf. 27% of all Businesses) and *ease and efficiency of running your business* (20% cf. 24% of all Businesses) would be significantly better in the next two years.

In contrast, businesses with an annual turnover of more than \$20 M were significantly more likely to believe that the *ability to get preferred products within the required timeframes* (44% cf. 20% of all Businesses), *overall cost of products* (48% cf. 19% of all Businesses), *overall financial performance of your business* (44% cf. 27% of all Businesses) and *ease and efficiency of running your business* (42% cf. 24% of all Businesses) would be significantly better in the next two years.

Table 71: Things likely to change in New Zealand over the next two years – Businesses (turnover) (II)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Ability to getting preferred products within the required timeframes				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	24%	28%	24%	9%
NETT Neutral (3–5)	50%	49%	51%	46%
NETT Will be significantly better in 2 years (6–7)	20%	14%	21%	44%
Don't know / not applicable	6%	9%	4%	1%
Overall cost of products				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	39%	45%	39%	14%
NETT Neutral (3–5)	38%	38%	37%	37%
NETT Will be significantly better in 2 years (6–7)	19%	11%	21%	48%
Don't know / not applicable	4%	6%	2%	2%
Overall financial performance of your business				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	6%	8%	5%	2%
NETT Neutral (3–5)	61%	64%	60%	54%
NETT Will be significantly better in 2 years (6–7)	27%	21%	32%	44%
Don't know / not applicable	5%	7%	2%	0%
Ease & efficiency of running your business				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	10%	12%	11%	5%
NETT Neutral (3–5)	60%	60%	63%	50%
NETT Will be significantly better in 2 years (6–7)	24%	20%	25%	42%
Don't know / not applicable	5%	8%	1%	3%

In addition, Table 72 shows Businesses with an annual turnover below \$1 M were significantly less likely to believe that the *availability of suitable staff* (14% cf. 20% of all Businesses), *ability to train and invest in staff* (15% cf. 21% of all Businesses), *financial viability of your business* (21% cf. 27% of all Businesses) and *quality of building work in the industry* (16% cf. 22% of all Businesses) would be significantly better in the next two years.

In contrast, businesses with an annual turnover of more than \$20 M were significantly more likely to believe that *availability of suitable staff* (41% cf. 20% of all Businesses), *ability to retain staff* (37% cf. 20% of all Businesses), *ability to train and invest in staff* (41% cf. 21% of all Businesses), *financial viability of your business* (42% cf. 27% of all Businesses) and *quality of building work in the industry* (41% cf. 22% of all Businesses) would improve.

Table 72: Things likely to change in New Zealand over the next two years – Businesses (turnover) (III)

Businesses <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	ANNUAL BUSINESS TURNOVER			
	Total	NETT <1 M	NETT 1–20 M	NETT >20 M
Availability of suitable staff				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	22%	20%	26%	11%
NETT Neutral (3–5)	49%	49%	50%	46%
NETT Will be significantly better in 2 years (6–7)	20%	14%	22%	41%
Don't know / not applicable	10%	18%	2%	2%
Ability to retain staff				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	12%	11%	14%	4%
NETT Neutral (3–5)	57%	52%	62%	56%
NETT Will be significantly better in 2 years (6–7)	20%	16%	21%	37%
Don't know / not applicable	11%	21%	2%	3%
Ability to train & invest in staff				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	11%	12%	11%	4%
NETT Neutral (3–5)	58%	53%	65%	53%
NETT Will be significantly better in 2 years (6–7)	21%	15%	23%	41%
Don't know / not applicable	10%	21%	1%	2%
Financial viability of your business				
<i>Base, n=</i>	1,118	470	443	123
NETT Will be significantly worse in 2 years (1–2)	6%	8%	5%	3%
NETT Neutral (3–5)	62%	63%	64%	51%
NETT Will be significantly better in 2 years (6–7)	27%	21%	30%	42%
Don't know / not applicable	5%	8%	2%	3%
Quality of building work in the industry				
<i>Base, n=</i>	1,118	663	356	99
NETT Will be significantly worse in 2 years (1–2)	14%	16%	15%	7%
NETT Neutral (3–5)	57%	59%	55%	51%
NETT Will be significantly better in 2 years (6–7)	22%	16%	26%	41%
Don't know / not applicable	6%	10%	4%	2%

Things likely to change in New Zealand over the next two years – Workers – Sub-groups of relevance

According to Table 73, Workers with personal incomes of \$100,000–\$150,001 and more than \$150,001 were significantly more likely to believe that their *overall working conditions* (57% each cf. 33% of all Workers), *level of pay* (57% and 56% respectively cf. 39% of all Workers), *work–life balance* (57% and 56% respectively cf. 35% of all Workers) and *job security* (57% and 52% respectively cf. 36% of all Workers) would be better in two years’ time.

Workers with a personal income of less than \$50,000 were significantly less likely to believe that their *overall working conditions* (23% cf. 33% of all Workers), *level of pay* (28% cf. 39% of all Workers), *work–life balance* (25% cf. 35% of all Workers) and *job security* (28% cf. 36% of all Workers) would be significantly better in the next two years.

Table 73: Things likely to change in New Zealand over the next two years – Workers (personal income)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	PERSONAL INCOME				
	Total	<\$50,000	\$50,001–\$100,000	\$100,001–\$150,000	>\$150,001
Your overall working conditions					
<i>Base, n=</i>	1,038	268	425	205	63
NETT Will be significantly worse in 2 years (1–2)	9%	12%	10%	5%	5%
NETT Neutral (3–5)	53%	59%	59%	37%	38%
NETT Will be significantly better in 2 years (6–7)	33%	23%	27%	57%	57%
Don't know / not applicable	5%	6%	5%	1%	0%
Your level of pay					
<i>Base, n=</i>	1,038	268	425	205	63
NETT Will be significantly worse in 2 years (1–2)	5%	9%	4%	1%	0%
NETT Neutral (3–5)	51%	57%	56%	39%	40%
NETT Will be significantly better in 2 years (6–7)	39%	28%	36%	57%	56%
Don't know / not applicable	6%	5%	4%	3%	5%
Your work–life balance					
<i>Base, n=</i>	1,038	268	425	205	63
NETT Will be significantly worse in 2 years (1–2)	4%	7%	3%	3%	2%
NETT Neutral (3–5)	56%	63%	64%	39%	43%
NETT Will be significantly better in 2 years (6–7)	35%	25%	30%	57%	56%
Don't know / not applicable	4%	5%	3%	1%	0%
Your job security					
<i>Base, n=</i>	1,038	268	425	205	63
NETT Will be significantly worse in 2 years (1–2)	5%	7%	4%	3%	5%
NETT Neutral (3–5)	55%	59%	61%	40%	41%
NETT Will be significantly better in 2 years (6–7)	36%	28%	31%	57%	52%
Don't know / not applicable	5%	6%	4%	0%	2%

According to Table 74, those on a fixed salary were significantly more likely to believe that their *working conditions* (41% cf. 33% of all Workers), *level of pay* (46% cf. 39% of all Workers), *work–life balance* (43% cf. of 35% of all Workers) and *job security* (41% cf. 36% of all Workers) would be better in the next two years.

Those who were paid by the hour were significantly less likely to believe that their *working conditions* (26% cf. 33% of all Workers), *level of pay* (32% cf. 39% of all Workers) and *work–life balance* (27% cf. 35% all Workers) would be significantly better in the next two years.

Table 74: Things likely to change in New Zealand over the next two years – Workers (payment type)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	PAYMENT TYPE				
	Total	I am on a fixed salary	I am paid by the hour	I am paid according to fixed-price contracts	I am paid another way
Your overall working conditions					
<i>Base, n=</i>	1,038	452	495	72	19*
NETT Will be significantly worse in 2 years (1–2)	9%	8%	11%	6%	11%
NETT Neutral (3–5)	53%	48%	57%	62%	37%
NETT Will be significantly better in 2 years (6–7)	33%	41%	26%	29%	21%
Don't know / not applicable	5%	4%	6%	3%	32%
Your level of pay					
<i>Base, n=</i>	1,038	452	495	72	19*
NETT Will be significantly worse in 2 years (1–2)	5%	3%	7%	1%	0%
NETT Neutral (3–5)	51%	48%	54%	51%	37%
NETT Will be significantly better in 2 years (6–7)	39%	46%	32%	39%	32%
Don't know / not applicable	6%	3%	7%	8%	32%
Your work–life balance					
<i>Base, n=</i>	1,038	452	495	72	19*
NETT Will be significantly worse in 2 years (1–2)	4%	3%	5%	4%	5%
NETT Neutral (3–5)	56%	53%	61%	50%	47%
NETT Will be significantly better in 2 years (6–7)	35%	43%	27%	43%	21%
Don't know / not applicable	4%	2%	6%	3%	26%
Your job security					
<i>Base, n=</i>	1,038	452	495	72	19*
NETT Will be significantly worse in 2 years (1–2)	5%	4%	6%	3%	11%
NETT Neutral (3–5)	55%	52%	56%	61%	37%
NETT Will be significantly better in 2 years (6–7)	36%	41%	31%	35%	32%
Don't know / not applicable	5%	3%	7%	1%	21%

***Caution:** Low base size, results indicative only.

Things likely to change in New Zealand over the next two years – End-Users – Sub-groups of relevance

In terms of End-User groups, Table 75 shows Build Delayers were significantly more likely to believe the *ease and timeliness of working with councils* (30% cf. 15% of all End-Users) and *service suppliers* (28% cf. 17% of all End-Users), *overall cost of products* (23% cf. 11% of all End-Users) and *availability of suitable tradespeople* (28% cf. 18% of all End-Users) would improve over the next two years.

Table 75: Things likely to change in New Zealand over the next two years – End-Users (builders and renovators)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP				
	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Ease & timeliness of working with councils					
<i>Base, n=</i>	1,700	115	385	90	110
Will get worse	44%	44%	47%	34%	45%
No change	30%	32%	26%	31%	24%
Will improve	15%	17%	13%	30%	15%
Don't know	11%	6%	14%	4%	17%
How 'friendly' banks & lenders will be to people getting mortgages / loans for new homes / renovations					
<i>Base, n=</i>	1,700	115	385	90	110
Will get worse	37%	40%	40%	38%	36%
No change	31%	34%	31%	31%	29%
Will improve	18%	13%	15%	22%	16%
Don't know	14%	13%	15%	9%	18%
Ease & timeliness of working with service suppliers (e.g. tradespeople)					
<i>Base, n=</i>	1,700	115	385	90	110
Will get worse	45%	46%	45%	28%	43%
No change	28%	25%	27%	39%	26%
Will improve	17%	17%	18%	28%	18%
Don't know	10%	12%	9%	6%	13%
Ability to find, order & receive preferred products within the required timeframes					
<i>Base, n=</i>	1,700	115	385	90	110
Will get worse	56%	55%	56%	44%	51%
No change	18%	17%	21%	26%	21%
Will improve	18%	17%	16%	24%	19%
Don't know	8%	12%	7%	6%	9%
Overall cost of products					
<i>Base, n=</i>	1,700	115	385	90	110
Will get worse	70%	70%	74%	50%	63%
No change	13%	15%	11%	24%	14%
Will improve	11%	11%	10%	23%	15%
Don't know	6%	4%	5%	2%	9%

End-Users	Total	Current / recent builders	Current / recent renovators	Build delayers	Renovation delayers
Availability of suitable tradespeople					
Base, n=	1,700	115	385	90	110
Will get worse	50%	48%	53%	36%	56%
No change	23%	24%	22%	32%	18%
Will improve	18%	17%	17%	28%	16%
Don't know	8%	10%	7%	4%	9%

Table 76 shows Homeowners were significantly more likely to believe that the *ease and timeliness of working with councils* would get worse (50% cf. 44% of all End-Users). Conversely, a significant proportion of Renovation Planners believed there would be no change (37% cf. 30% of all End-Users) and a significant proportion of Build Planners believed there would be an improvement (21% cf. 15% of all End-Users).

Build Planners were significantly more likely to believe that all aspects (except *ease and timeliness of working with service suppliers*) would improve over the next two years.

Table 76: Things likely to change in New Zealand over the next two years – End-Users (planners and homeowners)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP			
	Total	Build planners	Renovation planners	Home-owners
Ease & timeliness of working with councils				
Base, n=	1,700	165	335	500
Will get worse	44%	40%	38%	50%
No change	30%	32%	37%	30%
Will improve	15%	21%	15%	10%
Don't know	11%	7%	11%	11%
How 'friendly' banks & lenders will be to people getting mortgages / loans for new homes / renovations				
Base, n=	1,700	165	335	500
Will get worse	37%	41%	36%	34%
No change	31%	26%	33%	32%
Will improve	18%	25%	16%	20%
Don't know	14%	8%	14%	14%
Ease & timeliness of working with service suppliers (e.g. tradespeople)				
Base, n=	1,700	165	335	500
Will get worse	45%	44%	48%	47%
No change	28%	27%	28%	27%
Will improve	17%	24%	15%	15%
Don't know	10%	5%	9%	11%

End-Users	Total	Build planners	Renovation planners	Home-owners
Ability to find, order & receive preferred products within the required timeframes				
Base, n=	1,700	165	335	500
Will get worse	56%	51%	56%	60%
No change	18%	19%	17%	15%
Will improve	18%	24%	19%	16%
Don't know	8%	6%	8%	9%
Overall cost of products				
Base, n=	1,700	165	335	500
Will get worse	70%	62%	71%	75%
No change	13%	14%	14%	10%
Will improve	11%	16%	9%	7%
Don't know	6%	7%	6%	8%
Availability of suitable tradespeople				
Base, n=	1,700	165	335	500
Will get worse	50%	38%	53%	53%
No change	23%	27%	23%	22%
Will improve	18%	30%	16%	15%
Don't know	8%	5%	8%	10%

Plan to do in the next five years – Workers – Sub-groups of relevance

As expected, Table 77 shows younger Workers were more likely have career development plans for the next five years, with Workers aged 15–29 years being significantly more likely to plan on getting *extra qualifications within the building and construction sector* (38% cf. 31% of all Workers).

In contrast, those aged 50–69 were significantly less likely to *look to get promoted in their current work* (21% cf. 32% of all Workers), *get extra qualifications within the building and construction sector* (16% cf. 31% of all Workers), *set up own business within the building and construction sector* (9% cf. 24% of all Workers) and *leave New Zealand to live and work elsewhere* (12% cf. 21% of all Workers).

Table 77: Plan to do in the next five years – Workers (age groups)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	WORKER AGE GROUPS			
	Total	15–29 years	30–49 years	50–69 years
Base, n=	1,038	352	584	97
Look to get promoted at your current work	32%	35%	33%	21%
Get extra qualifications, within the building & construction sector	31%	38%	29%	16%
Set up your own business, within the building & construction sector	24%	27%	25%	9%
Leave New Zealand to live & work elsewhere	21%	23%	21%	12%
Leave your job for another job, outside the building & construction sector	20%	24%	19%	20%
Pause work so you can do extra training / study	15%	16%	14%	15%
Pause work for personal reasons	14%	16%	13%	15%
Retire	8%	5%	7%	26%
Don't know	7%	8%	6%	6%
None of these	9%	4%	10%	22%

Note: Base size too low to report results for the 70+ age group.

According to Table 78, female Workers were significantly less likely to plan to *set up their own business within the building and construction sector* (19% cf. 24% of all Workers).

Table 78: Plan to do in the next five years – Workers (gender)

Workers <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	WORKER GENDER		
	Total	Female	Male
<i>Base, n=</i>	1,038	323	697
Look to get promoted at your current work	32%	37%	30%
Get extra qualifications, within the building & construction sector	31%	31%	30%
Set up your own business, within the building & construction sector	24%	19%	27%
Leave New Zealand to live & work elsewhere	21%	21%	20%
Leave your job for another job outside the building & construction sector	20%	22%	19%
Pause work so you can do extra training / study	15%	14%	14%
Pause work for personal reasons	14%	17%	13%
None of these	9%	8%	9%
Retire	8%	7%	8%
Don't know	7%	6%	7%

Expect to do in the two years – End-Users – Sub-groups of relevance

Future expectations vary by End-Users' situations.

According to Table 79, Renovation Delayers and Renovation Planners both expect to *do more DIY because of a lack of tradespeople* (56% and 50% respectively cf. 44% of all End-Users).

Build Delayers, Renovation Delayers and Build Planners all expect to *delay their building or renovation work because of rising construction costs* (57%, 58% and 55% respectively cf. 44% of all End-Users).

Renovation Delayers, Build Planners and Renovation Planners all expect to *delay their building or renovation work because of a lack of tradespeople* (59%, 50% and 46% respectively cf. 40% of all End-Users).

According to Table 80, End-Users with a NETT Household Income under \$50k p.a. were more likely to feel that in the next two years they would *struggle to pay your mortgage, rent or other everyday bills* (29% cf. 22% of all End-Users).

End-Users in the Bay of Plenty, Auckland, and Upper North Island were more likely to feel that they would move to a different town or city to get more affordable housing (29%, 25%, and 24% respectively cf. 20% of all End-Users).

Table 79: Expect to do in the next two years – End-Users (i)

End-Users <i>Note that the base sizes for the sub-sample columns may not sum to equal that of the Total column. This is because not all sub-samples may be shown.</i>	END-USER GROUP					
	Total	Build Delayers	Renovation Delayers	Renovation Planners	Home-Owners	
Do more DIY because of a lack of tradespeople						
<i>Base, n=</i>	1,700	90	110	335	500	
More likely	44%	53%	56%	50%	33%	
No change	38%	27%	24%	35%	45%	
Less likely	9%	10%	9%	9%	8%	
Don't know / Not applicable	10%	10%	11%	5%	14%	
Delay building/renovation work due to rising construction costs		Current / Recent Builders	Build Delayers	Renovation Delayers	Build planners	Home-owners
<i>Base, n=</i>	1,700	115	90	110	165	500
More likely	44%	36%	57%	58%	55%	33%
No change	32%	30%	33%	26%	29%	32%
Less likely	8%	17%	3%	7%	10%	6%
Don't know / Not applicable	16%	17%	7%	8%	6%	29%
Delay building/renovation work due to a lack of tradespeople		Renovation Delayers	Build Planners	Renovation Planners	Home-Owners	
<i>Base, n=</i>	1,700	110	165	335	500	
More likely	40%	59%	50%	46%	32%	
No change	34%	27%	33%	36%	34%	
Less likely	8%	3%	8%	8%	6%	
Don't know / Not applicable	18%	11%	8%	9%	29%	

Table 80: Expect to do in the next two years – End-Users (ii)

	Total	NETT Household Income under \$50k p.a.	NETT Household Income \$50k – \$100k p.a.	NETT Household Income over \$100k p.a.
Struggle to pay your mortgage, rent or other everyday bills				
<i>Base, n=</i>	1,700	372	568	551
More likely	22%	29%	24%	14%
No change	50%	44%	49%	56%
Less likely	13%	6%	14%	18%
Don't know / Not applicable	16%	21%	13%	12%
Struggle to pay your mortgage, rent or other everyday bills		NETT 15-29 years old	NETT 30-49 years old	NETT 50+ years old
<i>Base, n=</i>	1,700	244	596	616
More likely	22%	31%	24%	20%
No change	50%	41%	53%	51%
Less likely	13%	18%	16%	9%
Don't know / Not applicable	16%	11%	7%	20%
Move to a town or city to get cheaper housing		Bay of Plenty	Auckland	NETT Upper North Island
<i>Base, n=</i>	1,700	107	494	828
More likely	20%	29%	25%	24%
No change	39%	36%	37%	36%
Less likely	26%	14%	23%	24%
Don't know / Not applicable	16%	21%	21%	16%

Appendix D: Qualitative Discussion Guides

Group Discussion Guide

V4 06-04-21

Job No:	21-0211104	Type:	2 x 90-minute groups
Job Name:	MBIE COVID-19 and the Building System		

Purpose of this Document:

This document is designed to give the moderator a guide to work from in terms of the discussion flow. It is indicative only of the actual questions that will be asked, and provides an overview of the intended discussion points.

1. Warm-up and Introduction (5 mins)

Objective: *Explaining process*

Thank you for giving up your time to me today. My name is xxx and I work for a research company called Ipsos. We are doing this project for the Ministry for Business, Innovation and Employment. They have commissioned this research to understand the impact on COVID-19 on the Building industry. They will use this information to help them identify any ways in which they or others in government might be able to help the sector address the impacts of COVID-19 on the sector.

We are here this evening to give feedback on our experiences as people who are involved because we are building, renovating, have built or renovated or are planning to do so

As you will have seen in the email confirming this interview, your participation is voluntary, and the following guidelines apply:

- We are here to talk about the impact of COVID-19 on your building or renovation related experiences to date.
- There are no right or wrong answers, I'm interested in your thoughts and experiences only. I am just seeking to learn more about what is happening in the building sector from a customer point of view than what is reported in the media or what we all hear anecdotally.
- The interview will last about 1.5 hours, there is a lot to get through as a group and it will be quite fast paced, so please forgive me if I sometimes cut you off.
- We are recording the sessions (video and audio), but your name will not be used in our reporting.
- If for any reason you are uncomfortable answering a question or continuing, you may opt to not answer a question or withdraw from the interview.

Before we get into the tasks and the broader discussion, I would like to know a little bit more about you - can you tell me...

- Name/job/what keeps you busy during the day/living situation/hobbies/interests
- A brief recap building/renovation story e.g. have you built/renovated/are planning to etc.
 - *Discuss nature of project, timing, cost, location, what prompted the project etc.*
 - *Ensure clarification of what was affected by Covid*

2. COVID-19 General Reflections (5 mins)

Objective: *Exploring the impact of COVID-19 broadly on work, home life, etc., to provide context*

Let's take a step back and talk about Covid-19 in general and the impacts on us:

- What kinds of impacts have we felt? *Probe: home, work, lifestyle, finances*
- What have been the short-term impacts? The longer-term impacts?

3. COVID-19 Home Usage Reflections (10 mins)

Objective: *Exploring the impact of COVID-19 broadly on expectations and needs regarding housing*

How has COVID changed the way you currently or would like to live in your house, if at all?

Prompt the following if not spontaneously raised by respondents:

- House / room size or layout, due to Covid lifestyle changes
- Heating/Cooling/ Ventilation systems
- Access to open spaces (e.g. garden, deck, balcony)
- Location of your house in relation to your workplace etc (has their opinion changed about the location of the house in relation to the workplace, e.g. due to more remote working)
- Water/Energy supplies, other environmental concerns?
- Space to work from home if necessary
- Is this/are these a short-term change or likely to be a longer-term change to how you live?

What is the likelihood of acting on these changes? What would motivate you? What would hinder you?

4. Building Industry Impacts from a Customer's Perspective (50 mins)

Objective: *Building Industry impacts seen or experienced by customers regarding COVID-19:*

So, let's focus now on the impacts that COVID-19 has had on your building or renovation plans or projects.

Let's talk as a group about all the impacts that you have faced, or things that have affected your project due to COVID-19, then we will look at each of them in more detail.

- *Group to discuss, Moderator to make a note of each mentioned.*
- *Moderator may probe based on initial discussion of individual situation as discussed in section 1.*
- *For each impact – what it looked like in practice; the implications for them and others involved in the projects.*

5. People

Objective: *Building Industry impacts seen or experienced by customers regarding COVID-19 relating to people:*

What impacts has COVID-19 had on the **people** related to your project? What has this meant for your renovation/building project?

Moderator to review the People oriented issues cited in the previous section, discuss those, and then prompt for anything not already mentioned. This method will be repeated for the subsequent sections

Prompt and probe if not mentioned:

- *People being too busy to take the job –how long did it take for them to get a quote? Did they get the quotes they wanted? What sort of estimates given for when the supplier would be able to get the work done?*
- *Availability of the right people with the right skills for the job?*
- *Working from home – did this impact how you were involved in the project? Ask for both respondents and tradespeople*
- *General satisfaction of staff on the project e.g. any observed or discussed stress levels or difficulties expressed by tradespeople?*
- *Did your tradespeople reprioritise work in light of available materials or delayed projects?*
- *People being sick at home or looking after a sick (potentially sick) person at home E.g. if you went into self-isolation just when you needed to have tradespeople around the house?*
- *Delays/cancellations due to COVID-19 lockdowns in your area*

6. Products, Materials and Supplies

Objective: *Product impacts seen or experienced regarding COVID-19:*

Have you or any people you have hired had any difficulty getting access to **products or building supplies or trade staff** that you need for your building/renovation projects?

If so, what type of products did you or your tradespeople have difficulty getting?

What were the types of problem experienced?

What has this meant for your renovation/building project?

Moderator to review the Product, Materials or Supply oriented issues cited in the previous section, discuss those, and then prompt for anything not already mentioned. This method will be repeated for the subsequent sections

Probe if not mentioned:

- *Delays within the supply chain e.g. availability, timeframes, reliability of timing*
- *Types of products / materials available - explore any changes made and their reasons*
- *Costs of materials or deliveries e.g. delivery costs not cited*
- *Quality of what is delivered / available E.g. are you compromising or changing plans/products based on availability?*
- *Changes in what you wanted or specified? E.g. designs, price, functionality, quality, manufacturing, materials etc*
- *Quality / compliance issues (e.g. were their problems with consents due to product changes)*
- *Staff issues e.g. availability of staff skilled to use specific products or systems*

7. Process

Objective: *Building Industry process impacts seen or experienced by customers regarding COVID-19:*

Are you aware of any changes in the processes and procedures that businesses and regulatory authorities work within these days that have impacted your project? Probe for details

Specifically, can you please tell me of any changes you are aware of in relation to... What has this meant for your renovation/building project?

Explore consequences / impacts of each change

- *How people work with others in the industry*
- *Delays, breakdowns in systems and chains*
- *Interpersonal interactions and working practices, e.g. social distancing, remote working, flexible hours*
- *Paperwork, consents and red tape procedures - points of pain/bottlenecks*

- *How banks and other lenders are treating loans*

8. Performance

Objective: *Building Industry performance impacts seen or experienced by customers regarding COVID-19:*

Let's talk now about building **performance**, which can cover things like safety, durability, environmental efficiency, windows and ventilation systems, plumbing and drainage, electrical outlets, heating and lighting etc.

Are you aware of any changes, or have you actually made some changes in the performance levels of your building project as a result of COVID-19? E.g. your current heating system/methods were not working well, and you decided to upgrade. What has this meant for your renovation/building project?

Probe for examples, including consequences of the changes.

Moderator to review the Performance oriented issues cited in the previous section, discuss those, and then prompt for anything not already mentioned. This method will be repeated for the subsequent sections

Probe if not mentioned:

- *Environmental issues, E.g. sustainability / environmental changes; e.g. solar power, water savings, energy efficient buildings, recycled or low CO2 materials, insulation, airflows, soundproofing etc*
- *Lifestyle issues, e.g. additional of home offices, children's home study areas, design features for extended family members / multi-generational living*
- *Cost issues, e.g. spending more / less due to performance changes*
- *Safety issues, e.g. security systems, alarms, CCTV*

9. Financial, Social and Personal Impacts

Objective: *Financial, social or personal Building Industry impacts seen or experienced by customers regarding COVID-19:*

Are you aware of any **financial, social** or **personal** impacts arising from COVID-19's effects on the building sector? What has this meant for your renovation/building project?

Probe for examples, including consequences of the changes

- *On you and your project? e.g. on changing current/future plans for building/renovating, loan servicing, investments, people not being able to move houses when needed, financial stressors, emotional exhaustion*
- *On people working on your project. E.g. getting builders to provide quotes, and do the work itself, demeanour and attitude of tradespeople*

Relative importance

Ask as individuals:

- Of these impacts, which ones have been the most important? How come?
- What about the least important? How come?

Anticipated implications of these impacts in the future

I wanted to think now about the impacts we have just talked about relative to your projects:

- What these impacts will mean personally for you?
- How you will change or adapt if necessary?
- What will it mean for homeowners, home builders and renovators like you in general? E.g. What do you think will be the impact of these things on the wider society *e.g. will people look for full-service suppliers, will they become more focused on quality, on value etc? Will there be more houses, less houses different types of houses available? Will there be a permanent change on the layout of NZ houses?*

10. Wrap Up/Summary (10 mins)

Objective: *Identify areas / opportunities to enhance ideas*

And finally:

- Thinking about everything we have spoken about today, what is the one thing that could have made the past year easier for your building project? *Probe for reasons why*
- OR What would make the next year easier for your project? *Probe for reasons why*
- What is the one key thing you think the Government should understand in relation to the effects of COVID-19 on the building sector for people in your situation? *Probe for examples*
- Is there anything else you'd like to add? Anything missed from our discussion so far today that is important?

Thank you very much for your time today. If you want to get in touch with me about this research my contact details are < - - - >. After these interviews are completed, the report on them will be presented to MBIE and a quantitative survey of businesses in the building sector will be undertaken.

Thank and Close

Business Depths Discussion Guide

FINAL 29-03-21

Job No:	21-0211104	Type:	12 x 60-min depths
Job Name:	MBIE COVID-19 and the Building System		

Purpose of this Document:

This document is designed to give the moderator a guide to work from in terms of the discussion flow. It is indicative only of the actual questions that will be asked, and provides an overview of the intended discussion points.

1. Warm-up and Introduction (5 mins)

Objective: *Explaining process*

Thank you for giving up your time to me today. My name is xxx and I work for a research company called Ipsos. We are doing this project for the Ministry for Business, Innovation and Employment. They have commissioned this research to understand the impact of COVID-19 on the Building industry. They will use this information to help them identify any ways in which they or others in government might be able to help the sector address the impacts of COVID-19 on the sector.

As you will have seen in the email confirming this interview, your participation is voluntary and the following guidelines apply:

- We are here to talk about you and your businesses' experiences with COVID-19 to date.
- There are no right or wrong answers, I'm interested in your thoughts and experiences only. It's all confidential and your thoughts will not be seen as representative of your business. I am just seeking to learn more about what is happening in the building sector than what is reported in the media or what we all hear anecdotally.
- The interview will last about 1 hour, there is a lot to get through and it will be quite fast paced, so please forgive me if I sometimes cut you off.
- We are recording the sessions (video and audio), but your full name and business name will not be used in our reporting.
- If for any reason you are uncomfortable answering a question or continuing, you may opt to not answer a question or withdraw from the interview.

2. Business Profile (5 mins)

Objective: *Understanding the participant, their business, and how they fit within the wider building system*

So let's start by telling me about your job and the business you work for...

- The business you work for; what the business does
- How big the business is; how long it's been established for etc
- The kind of work you do; the kind of clients and people you deal with
- The responsibilities and tasks you have in your day-to-day work, both official and unofficial

Next I'm going to ask you to consider how your business fits within the overall building system. One way of categorising the other parts of the system is to divide other parts of the system into those that you pay, e.g. suppliers; and those who pay you, e.g. clients.

So to start with, can you please tell me about the types of people or businesses...

- That your business pays? *Probe for more detail*
- That pay your business? *Probe for more detail*
- That you don't directly pay or invoice, but who you still have to work with? *Probe for more detail*

3. COVID-19 Context and Reflections (10 mins)

Objective: *Exploring the broad impact of COVID-19 broadly to provide context*

So let's talk about COVID-19 in general and its impacts.

- How was the first big Level 4 lockdown (in March/April last year) ...
 - For your business?
 - For you personally?
 - For others in your business?

Some would say that New Zealand has now settled into a 'new normal'.

- What have been the more ongoing changes for your business that have arisen from these experiences? *Probe for both positive and negative changes.*
- *Additional probes:*
 - What about for those businesses or people you pay for goods and services?
 - What about for those businesses or people who have to pay you?
 - What about others who your business is indirectly involved with?
 - What about for your staff?
 - What about for you personally?

- What are your thoughts about what will happen over the next 6-12 months in relation to COVID-19 and your sector?
 - What about beyond that, say from 2-5 years?
 - And beyond?
- Is your business's future planning being influenced by COVID-19? In what ways?
Probe for details

4. COVID-19 Processes (10 mins)

Objective: *Exploring the broad impact of COVID-19 broadly to provide context*

Clearly things are different to the way they were before COVID-19, and we've talked a bit about the changes that have arisen. The first Level 4 and 3 lockdowns certainly changed a lot of how people do things, both personally and professionally.

Are you aware of any changes in the **processes and procedures** that businesses and regulatory authorities work within these days? *Probe for details*

Specifically, can you please tell me of any changes you are aware of in relation to...
Explore consequences / impacts of each change

- How people work with others in the industry
- Delays, breakdowns in systems and chains
- Interpersonal interactions and working practices, e.g. social distancing, remote working, flexible hours
- Paperwork, consents and red tape procedures - points of pain/bottlenecks
- How banks and other lenders are treating loans
- Changing priorities in those you report to / service that are making you do your job differently
- Paperwork problems, e.g. maintaining accreditations or similar licenses
- Problems such as Notices to Fix, building defects, incomplete / poor paperwork quality

Where should improvements in these sorts of procedural issues be made?

5. Building Industry Impacts – Performance / Products (15 mins)

Objective: *Performance and products impacts seen or experienced regarding COVID-19:*

Looking now at **Products**, including both physical products like building materials and the intangible products like digital solutions or software, and how they **perform** when used in specific building projects.

Are you aware of any changes in the building products being used as a result of COVID-19? *Probe for examples, including consequences of the changes*

Specifically, can you please tell me of any changes you are aware of in relation to...
Explore consequences / impacts of each change

- Availability and cost of building products in the past year?
- Changes in product supplies? *E.g. availability, timeframes, price, quality, reliability, costs*
 - How supply chain issues were addressed in the past year (if applicable) and how they are being addressed now
- Changes in what people or businesses want or specify? *E.g. designs, price, functionality, quality, manufacturing, materials etc*
- Product changes, *explore what types of changes and their reasons*
- Quality / compliance issues
- Staff issues e.g. availability of staff skilled to use specific products or systems

Building products naturally influence building **performance**, considering things like safety, durability, environmental impact, and the quality of the buildings for those living and working in them.

Are you aware of any changes in the performance levels of current and recently built building projects as a result of COVID-19? *Probe for examples, including consequences of the changes*

Specifically, can you please tell me of any changes you are aware of in relation to how COVID-19 has influenced...

Explore consequences / impacts of each change

- Cost issues, such as available capital, willingness to spend etc
- How they design their buildings / what customers want / changing priorities since people's behaviours have changed *E.g. smaller commercial offices with the increase in remote working.*
- Environmental preferences, *E.g. sustainability / environmental desires; e.g. increased interest in solar power, energy efficient buildings, recycled or low CO2 materials etc*
- Quality of completed jobs / Compliance levels
- Practicality issues, *e.g. arising from problems with other parts of the system*

- Consent / paperwork / red tape issues
- Skill / staff / capability issues

6. Building Industry Impacts – Financial (10 mins)

Objective: *Financial impacts seen or experienced regarding COVID-19:*

So let's focus now on the **financial** impacts that COVID-19 is having on you, your business, and others in the building sector that you deal with. I understand you might not have exact knowledge of the impacts on other businesses, but may have heard of or observed things going on.

What, if any, financial impacts is COVID-19 currently having...

Explore consequences / impacts of each change

- On your business? On other businesses like yours?
 - Probe: Did they have to take on (more) loans; apply for the Wage Subsidy?
 - Feeling financially confident/secure/viable?
- On those businesses or people you pay in exchange for goods and services, *e.g. suppliers, consultants or others?*
- On those businesses or people who have to pay you, *e.g. customers?*
- On others who your business is indirectly involved with, *e.g. consenting authorities or other businesses involved in your projects?*
- On your staff? *E.g. quantity & reliability of work; staff personal issues; availability of necessary staff; training / retraining / apprenticeships*
- On future plans, *e.g. investments, loan servicing, R&D, expansions / contraction etc*

7. Building Industry Impacts – Social / Personal / People (10 mins)

Objective: *Impacts on People seen or experienced regarding COVID-19:*

So far today we have been focussing on the functional aspects of the building sector, such as finances and products. But these all involve **people** too, both as individuals and society as a whole, at work and at home.

Are you aware of any personal or social changes arising from COVID-19's effects on the building sector?

Probe for examples, including consequences of the changes

- On people within your business or other businesses? *E.g. staff and their families?*
 - Probe: *What changes (if any) have they made in the past year e.g.,*
 - *Did they lay off staff during the Level 4 lockdown- how was this managed?*
 - *Do they need more staff? Have they got staff with the right skills?*
 - Probe: *What are their intentions for the future e.g.,*

- *Are they intending to expand the business and hire more staff?*
- On people you pay in exchange for goods and services, e.g., suppliers, consultants or others?
- On those people who have to pay you, e.g. customers?
- On others who your business is indirectly involved with, e.g. consenting authorities or other businesses involved in your projects?

Are you aware of any changes in the building industry arising from COVID-19's effects on....

Explore consequences / impacts of each change

- The stress and mental health of people involved in the building sector
- Workforce demands, e.g. *staff shortages (in not having enough people and/or not having enough people with the right skills) and how they are being / not being met?*
- Possible mistreatment of staff e.g. *poor working conditions, overwork, being underpaid, being paid under the table, etc.*
- Those with special skills? Job performance quality?
- Health and safety/ supervision – in general and re: COVID
- Compliance rates, e.g. *with staff management or conditions*
- How certain people have had to be more restricted than others, e.g. the elderly or sick?
- The impacts of travel restrictions, e.g. *on staff availability, customers*
- Impacts on social issues, e.g. *people not being able to move houses when needed, financial stressors, changing plans*

How do you think people in your sector can be better supported?

8. Wrap Up / Summary (5 min)

Objective: *Clarify? Identify areas / opportunities to enhance ideas*

And finally:

- Thinking about everything we have spoken about today, what is the one thing that could have made the past year easier for your business? *Probe for reasons why*
- What would make the next year easier for your business? *Probe for reasons why*
- What is the one key thing you think MBIE should understand in relation to the effects of COVID-19 on the building sector? *Probe for examples*
- How best do you think MBIE could assist the building sector to overcome the challenges presented by COVID-19? *Probe for examples*
- Is there anything else you'd like to add? Anything missed from our discussion so far today that is important?

Thank you very much for your time today. If you want to get in touch with me about this research my contact details are < - - ->. After these interviews are completed, the report on them will be presented to MBIE and a quantitative survey of businesses in the building sector will be undertaken. The final report will be available via MBIE by approximately <month TBC>

Thank and Close

Appendix E: Quantitative Questionnaires

Master Screening Questionnaire

Final 210521

Job No:	21-000714-01
Job Name:	MBIE COVID-19 and the Building System

SCREENING QUESTIONS AS PRESENTED TO MEMBERS OF IIS PANELS.

THESE QUESTIONS RECOGNISE THAT WHILE THESE PANELS ARE PRIMARILY INTENDED TO BE USED TO ACCESS END USERS AND SOME WORKERS, THERE MAY BE BUSINESSES AMONGST THE PANELLISTS AND SO WE SHOULD ENSURE WE CAN IDENTIFY THEM AND INCLUDE THEM IN THE APPROPRIATE QUESTIONNAIRES.

Let's start by learning about you so we can ensure we only ask questions that are relevant to you.

QA0 Which one of the following statements best describes you?

SINGLE CHOICE

a. I am currently employed in the commercial building and construction sector but I am not a senior manager, owner or decision maker	DIRECT TO 'INTRODUCTION' OF WORKERS QUESTIONNAIRE
b. I currently own or manage a business in the building and construction sector	DIRECT TO 'INTRODUCTION' OF BUSINESS QUESTIONNAIRE
c. I am currently a senior manager / key decision maker of a business in the building and construction sector	
d. I am not professionally involved in the building and construction sector in any way	DIRECT TO HA1 OF END-USERS QUESTIONNAIRE
e. I work for a local or central government organisation that regulates the building sector	THANK AND CLOSE
f. I work for an association or similar group within the building sector	

Business Entity Questionnaire

Final 210521

Job No:	21-000714-01	Type:	Online questionnaire; Business entities
Job Name:	MBIE COVID-19 and the Building System		

[TO SHOW TO OFFLINE RESPONDENTS ONLY].

Thanks, you're eligible for the survey. By completing this questionnaire you will go into the draw to win 1 x \$500 Prezzy card or one of 5 x \$100 Prezzy cards, and we will ask you for your contact details at the end so we can contact you if you are a winner. You don't have to provide your details if you don't want to, and your personal details will never be shared with anyone outside of Ipsos.

<'CONTINUE' BUTTON>

[SHOW ALL].

Please answer these questions from the perspective of your main business in the building and construction sector. Please note you are replying on behalf of your business (not as a member of the business).

The following questions look at different aspects of the building and construction process. We are interested to understand how these different aspects of the building process have been impacted by COVID -19 in your business. Please note when we refer to the time 'before COVID-19' we mean before mid-March 2020 (i.e. when the first Level 4 lockdown was announced).

QA1 Which of the following best describes you?

SINGLE CHOICE

a. I own a business in the building sector	
b. I am a senior manager / decision-maker in a building sector business	
c. I am an independent contractor in the building sector	

PROCESSES AND PROCEDURES

QB1 Thinking about the **time and effort** taken to get the following aspects of **paperwork, processes and procedures** done, how have these aspects changed when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
1. Building consents granted	1	2	3	4
2. Getting Titles, Drawings and similar council records	1	2	3	4
3. Building inspections completed	1	2	3	4
4. Finance and/or loans approved	1	2	3	4
5. Quotes from product suppliers (e.g. wholesalers or retailers)	1	2	3	4
6. Quotes from service suppliers (e.g. specialist workers)	1	2	3	4

PRODUCTS, MATERIALS AND PERFORMANCE

QC1 Looking now at **the products and materials** used in the building sector. How have the following aspects of **products and materials used in the building sector** been impacted when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
7. Being able to order the preferred products	1	2	3	4
8. Having the preferred products supplied on time	1	2	3	4
9. The quality of products that were supplied (including any substituted products)	1	2	3	4
10. The cost of products (excluding freight costs)	1	2	3	4
11. Freight costs	1	2	3	4
12. The cost of tools and other equipment	1	2	3	4

QC2A ASK ONLY IF QC1(7)=1

Which types of products are currently the most difficult to find and order?

SHOW QC2 ANSWER TABLE BELOW

QC2b ASK ONLY IF QC1(8)=1

Which types of products currently have the longest delivery timeframes / delays?

SHOW QC2 ANSWER TABLE BELOW

QC2c ASK ONLY IF QC1(9)=1

Which types of products currently have experienced the greatest quality problems since COVID-19? SHOW QC2 ANSWER TABLE BELOW

QC2d ASK ONLY IF QC1(10)=1 OR QC1(11)=1 OR QC1(12)=1

Which types of products have increased the most in price, including freight costs?

SHOW QC2 ANSWER TABLE BELOW

QC2A-D ANSWER TABLE (DO NOT RANDOMISE).

MULTIPLE RESPONSE EXCEPT 'NONE' OR 'DON'T KNOW'. ANCHOR 'NONE' AND 'DON'T KNOW'.

1. Aggregates
2. Appliances e.g. whiteware, heat pumps, etc
3. Ceiling/Suspended ceiling material (wood, gypsum, vinyl, fibre cement etc.)
4. Cement
5. Doors and Windows (aluminium, PVC etc.)
6. Doors (e.g. entrance, room doors)
7. Door and window hardware
8. Electrical material (fittings, wires etc.)
9. Elevators/ escalators
10. Ceramic tiles
11. Curtain walls
12. Floor covering (hard material)
13. Furniture
14. Garage doors
15. Glass / glazing products
16. Hardware (nails, screws and bolts)
17. Insulation materials
18. Joinery and Kitchen cabinetry
19. Landscaping materials
20. LED lightbulbs
21. Manufacturing equipment
22. Mastic asphaltting
23. Mechanical services (heating/cooling systems, air-conditioning systems, fire systems etc)
24. Metal / steel products (e.g. gates, fences, metal doors etc)
25. Paints, stains, solvents, special liquids
26. Plumbing and gas fitting and drainage material (including tapware)
27. Sanitary fixtures
28. Ready concrete (Ready mix)
29. Reinforcing steel
30. Roofing material
31. Security systems
32. Special clothing e.g. PPE, safety
33. Stoneware (e.g. bricks, blocks etc)
34. Structural steel
35. Special and Technical equipment
36. Textiles e.g. carpeting, curtains
37. Timber - Laminated
38. Timber – structural
39. Timber – other
40. Tools
41. Exterior wall cladding materials (e.g. metal cladding, wood cladding, cement board etc)
42. Interior wall lining material
43. Waterproofing materials
44. Wallpaper and other special finishes
45. Something else (please tell us what) <FREE TEXT BOX>
46. None of these
47. Don't know

QCd Overall, are the product supply problems you are facing the most problematic for products produced in New Zealand or overseas?

SINGLE CHOICE

a. NZ-produced products	
b. Imported products	
c. Equally bad for NZ and imported products	
d. Don't know	

QC3 Thinking now about **changes in building designs and specifications** that may have arisen when compared to the way things were before COVID-19. Which, if any, of the following changes do you believe have occurred in clients' design preferences and project-types when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

	THERE IS LESS INTEREST	NO CHANGE	THERE IS MORE INTEREST	DON'T KNOW / NOT APPLICABLE
a. Smaller offices and commercial space	1	2	3	4
b. Smaller houses	1	2	3	4
c. Larger houses	1	2	3	4
d. Multi-level buildings	1	2	3	4
e. Homes designed / modified for extended families / multi-generational living arrangement	1	2	3	4
f. Cheaper design / product designs	1	2	3	4
g. More expensive design / product designs	1	2	3	4
h. Home-offices (number, size etc)	1	2	3	4
i. More flexible residential design options	1	2	3	4
j. Design / specifications for less environmental impact	1	2	3	4
k. Interest in better-insulated buildings	1	2	3	4
l. Use of noise-reduction products / systems in interior walls	1	2	3	4
m. Using more durable materials	1	2	3	4
n. Using more energy efficient systems, designs and appliances	1	2	3	4
o. Using better heating and / or ventilation systems	1	2	3	4

QC4 How has the type of work your business does changed when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

	LESS OF THESE	NO CHANGE	MORE OF THESE	DON'T KNOW / NOT APPLICABLE
a. New commercial projects	1	2	3	4
b. New residential projects	1	2	3	4
c. New public sector projects	1	2	3	4
d. New infrastructure projects	1	2	3	4
e. Refurbishment or amendments to existing commercial buildings	1	2	3	4
f. Refurbishment or amendments to existing residential buildings	1	2	3	4
g. Refurbishment or amendments to existing public buildings	1	2	3	4
h. Maintenance or amendment to existing infrastructure	1	2	3	4

FINANCIAL, STAFF AND MANAGEMENT IMPACTS

QD1 Thinking now about the effects of COVID-19 on the **financial** aspects of your business.

How have the following aspects changed when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

RANDOMISE LIST BELOW	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
13. Turnover / revenue / sales	1	2	3	4
14. Product costs	1	2	3	4
15. Overhead costs (e.g. rent, equipment, fees)	1	2	3	4
16. Profit margins	1	2	3	4
17. Debt servicing costs / interest rates	1	2	3	4
18. Cashflow management	1	2	3	4
19. Financial penalties due to delays	1	2	3	4
20. Speed of customers paying your invoices	1	2	3	4
21. Lines of credit with suppliers	1	2	3	4
22. Degree of capital investments being made	1	2	3	4
23. Amount of stock inventory held	1	2	3	4
24. Amount of company debt	1	2	3	4
25. Compliance costs	1	2	3	4
26. Financial disputes with clients	1	2	3	4
27. Freight costs				

QD2 Thinking now about the effects of COVID-19 on the **management** aspects of your business organisation.

How have the following aspects changed when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

RANDOMISE LIST BELOW	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
28. Ease of securing new work	1	2	3	4
29. Ease of project management, getting usual work done	1	2	3	4
30. Ease of retaining existing clients / customers	1	2	3	4
31. Number of costly, problematic project completion delays	1	2	3	4
32. Number of project cancellations	1	2	3	4
33. Ease of future planning / forecasting	1	2	3	4
34. Range of goods and services offered	1	2	3	4
35. The 'pipeline' of future confirmed work	1	2	3	4
36. Disputes around the quality of the work with clients	1	2	3	4
37. Disputes around the timeframes of the work with clients	1	2	3	4

QD3a Which, if any, of the following has your business done, or is currently doing, to manage costs since COVID-19 arose?

MULTIPLE RESPONSE EXCEPT FOR N, RANDOMISE, ANCHOR N. AT LEAST ONE SELECTION PER COLUMN REQUIRED

	Last year (i.e. 12 months ago)	Currently
a. Cutting wages / salary for managers in the business	1	2
b. Cutting wages / salary for non-management staff	1	2
c. Asking staff to take unpaid leave / furlough	1	2
d. Asking staff to take paid annual leave	1	2
e. Asking staff to work reduced hours	1	2
f. Asking staff to work unpaid	1	2
g. Making staff redundant	1	2
h. Cancelling bonus / extra payments	1	2
i. Cancelling planned pay rises	1	2
j. Reducing operational overheads e.g. travel, capital purchases, rent etc	1	2
k. Negotiating new terms with your lender or investor	1	2
l. Reducing rent or rates payments	1	2
m. Offering fixed-term contracts instead of permanent roles	1	2
n. None of the above	1	2

QD3b Which of the following forms of financial support are you currently using, if any?

MULTIPLE RESPONSE EXCEPT FOR G, RANDOMISE, ANCHOR G

a. Business Finance Guarantee Scheme	1
b. Loss Carry Back Scheme	2
c. Other tax relief options (e.g. changes to UOMI / Use Of Money Interest remittance, provisional tax thresholds, small assets write-off rules, and building depreciation rules)	3
d. Leave Support Scheme (used to be 'COVID-19 Essential Workers Leave Support')	4
e. Small Business Cashflow Loan Scheme	5
f. Non- government business support e.g. from councils, chambers of commerce, industry associations etc	6
g. None of these	7

QD4 Thinking now about the effects of COVID-19 on you and your **staff** at your business organisation. How have the following aspects changed when compared to the way things were before COVID-19?

Please note we do understand that these issues may not be due to management problems, and may reflect things beyond management control, e.g. lockdowns or colleagues' family problems arising from COVID-19.

RANDOMISE. SINGLE RESPONSE PER ROW

RANDOMISE LIST BELOW	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
38. Pay rates	1	2	3	4
39. Ease of finding suitable staff from NZ	1	2	3	4
40. Ease of retaining suitable staff	1	2	3	4
41. Amount of staff overtime / long hours worked	1	2	3	4
42. Workplace mental wellbeing	1	2	3	4
43. The amount of downtime / under-utilised staff	1	2	3	4
44. Work-life balance	1	2	3	4
45. The ability to work flexibly (e.g. hours or places worked)	1	2	3	4
46. Ability to keep staff trained to a suitable skill level	1	2	3	4
47. Having staff with sufficient numeracy and literacy skills to do their role	1	2	3	4
48. Ability to upskill staff's technological capability	1	2	3	4
49. Physical safety at work	1	2	3	4
50. Ease of getting suitable staff from overseas	1	2	3	4

QD5 What are the top **three** areas of your business where you would most like help or advice?

RANDOMISE A-L, ANCHOR M-N

THREE ANSWERS REQUIRED EXCEPT IF N SELECTED

a. Pricing jobs correctly	
b. Managing employee performance	
c. Reducing business costs	
d. Marketing and advertising	
e. Understanding building regulations	
f. Managing cash flow	
g. Diversifying the business	
h. Adopting new technology	
i. Managing mental well-being	
j. Managing workplace health and safety	
k. Training employees	
l. Research and development	
m. Something else (please tell us what) <FREE TEXT>	
n. No areas [N exclusive]	

QD6 How much do you agree or disagree with each of the following statements about your place of work?

RANDOMISE. SINGLE RESPONSE PER ROW

	STRONGLY DISAGREE ←			→	STRONGLY AGREE	DON'T KNOW / NOT APPLICABLE
a. There are good structures and programmes to support the mental wellbeing of staff	1	2	3	4	5	6
b. There are good structures and programmes to support the physical wellbeing of staff	1	2	3	4	5	6
c. Staff at this workplace always feel physically safe at work	1	2	3	4	5	6
d. Staff at this workplace always feel emotionally safe at work	1	2	3	4	5	6
e. The management enables staff to care for their own wellbeing	1	2	3	4	5	6
f. The management enables staff to care for the wellbeing of others in their lives	1	2	3	4	5	6

QD7 Thinking now about the people working at your business / organisation. In general, how satisfied do you think they are with their overall experience at work?

SINGLE CHOICE ONLY

a. Very satisfied	
b. Satisfied	
c. Neither satisfied nor dissatisfied	
d. Dissatisfied	
e. Very dissatisfied	

BUSINESS IMPACT

QZ1 You have said that the factors shown below have got worse when compared to the way things were before COVID-19. Please can you select the ones that are probably going to have the greatest negative impact on you and your business organisation over the next two years.

MULTIPLE RESPONSE EXCEPT 'NONE' OR 'DON'T KNOW'.
RANDOMISE. ANCHOR 'NONE' AND 'DON'T KNOW'.

PIPE IN ALL FACTORS RATED '1' IN QUESTIONS:
QB1, QC1, QD1, QD2, QD4

FUTURE EXPECTATIONS

QF1 So far, we have been discussing changes that have occurred since COVID-19 arose.

How do you believe the following things are likely to change in New Zealand, over the next two years?

SINGLE RESPONSE PER ROW.

RANDOMISE LIST BELOW	Will be significantly worse in 2 years ←			→ Will be significantly better in 2 years				Don't know / Not applicable
a. Ease and timeliness of working with councils	1	2	3	4	5	6	7	8
b. How risk-adverse banks and lenders will be	1	2	3	4	5	6	7	8
c. Ease and timeliness of working with product suppliers	1	2	3	4	5	6	7	8
d. Ease and timeliness of working with service suppliers	1	2	3	4	5	6	7	8
e. Ability to getting preferred products within the required timeframes	1	2	3	4	5	6	7	8
f. The overall cost of products	1	2	3	4	5	6	7	8
g. Overall financial performance of your business	1	2	3	4	5	6	7	8
h. Ease and efficiency of running your business	1	2	3	4	5	6	7	8
i. Availability of suitable staff	1	2	3	4	5	6	7	8
j. Ability to retain staff	1	2	3	4	5	6	7	8
k. Ability to train and invest in staff	1	2	3	4	5	6	7	8
l. The financial viability of your business	1	2	3	4	5	6	7	8
m. The quality of building work in the industry	1	2	3	4	5	6	7	8

INDUSTRY OBSERVATIONS / COMPLIANCE

And finally, COVID-19 has created a challenging work environment for some, which may have changed the way businesses might normally have operated.

QE1 Please indicate which of the following you have heard about or which your business may have done in the past 12 months. Please remember that your responses will remain confidential.

RANDOMISE. ANCHOR 'NONE'

AT LEAST ONE SELECTION MUST BE MADE IN EACH COLUMN

	HAVE HEARD ABOUT OTHER BUSINESSES DOING THIS	HAVE DONE IN YOUR BUSINESS
a. Workers being paid less than the minimum wage	1	2
b. Workers being unable to take leave and or meal/rest breaks	1	2
c. Workers not having the health and safety equipment needed for their usual work	1	2
d. Workers being asked to work more than the hours they were paid for	1	2
e. Workers being paid "under the table"	1	2
f. Workers "cutting corners" due to work pressures	1	2
g. Workers having to work outside their Visa conditions	1	2
h. Products being substituted without approval (e.g. without client or council approval)	1	2
i. Reducing or deducting pay from workers	1	2
j. Workers being asked to complete tasks outside their skill set	1	2
k. Stockpiling ordering more products than needed	1	2
l. Not being able to follow all the COVID-19 health and safety protocols (e.g. the physical distancing)	1	2
m. None of these	1	2

QE2 FOR EACH CASE WHERE E1A TO E1k=1 OR 2 ASK
Do you believe that these activities are occurring more or less often since COVID-19?

PIPE IN ALL FACTORS RATED '1 OR 2' IN QE1A-QEk	
a. More often	
b. Less often	
c. No change	
d. Don't know / Unsure	

Final profile questions

Thanks for your time so far today. Just a few more questions about your business. Remember that your answers will be anonymously combined with other people completing the survey and your personal details will only be used for the prize draw, and then deleted.

QG1 Which of the following best describes the main type of work that your business does?

SINGLE RESPONSE

a. Construction	CONTINUE TO QG2
b. Project management	SKIP TO QG5A
c. Specifier / Architecture / Engineer / Surveyor etc	
d. Support services, e.g. labour supply, admin, legal, equipment maintenance, property management etc	SKIP TO QG5A
e. Manufacturing	SKIP TO QG5A
f. Retail trade	
g. Wholesale trade	
h. Interior design	
i. Something else (please specify) <TEXT BOX>	

QG2 ASK IF QG1=A

More specifically, what type of construction work is your business mainly involved in?

SINGLE RESPONSE, DO NOT RANDOMISE

a. Air Conditioning and Heating Services	
b. Bricklaying Services	
c. Carpentry Services	
d. Concreting Services	
e. Electrical Services	
f. Fire and Security Alarm Installation Services	
g. Glazing Services	
h. Hire of Construction Machinery with Operator	
i. House Construction	
j. Land Development and Subdivision	
k. Landscape Construction Services	
l. Non-Residential Building Construction	
m. Other Building Installation Services	
n. Other Heavy and Civil Engineering Construction	
o. Other Residential Building Construction	
p. Painting and Decorating Services	
q. Plastering and Ceiling Services	
r. Plumbing Services	
s. Road and Bridge Construction	
t. Roofing Services	
u. Site Preparation Services	
v. Structural Steel Erection Services	
w. Tiling and Carpeting Services	
x. Other Construction Services	

QG5a In which regions does the business / organisation where you work operate?

MULTIPLE RESPONSE, DO NOT RANDOMISE

a. All New Zealand	
b. Northland	
c. Auckland (from Bombay Hills to Wellsford, including the islands in the Hauraki Gulf)	
d. Waikato	
e. Bay of Plenty	
f. Gisborne	
g. Hawke's Bay	
h. Taranaki	
i. Manawatu / Whanganui	
j. Wellington (including Kapiti, Porirua, Hutt Valley and Wairarapa)	
k. Nelson or Tasman	
l. Marlborough	
m. West Coast	
n. Canterbury	
o. Otago	
p. Southland	
q. Chatham Islands	
r. Other, please specify	

QG5b Approximately how many staff are employed by the business / organisation where you work (in New Zealand)?

SINGLE RESPONSE PER COLUMN, DO NOT RANDOMISE

Full-time	Part-time (fewer than 30hrs a week)
0	0
1-5	1-5
6-9	6-9
10-19	10-19
20-49	20-49
50-99	50-99
100+	100+

QG6b For how long has your business operated in the construction sector?

SINGLE RESPONSE, DO NOT RANDOMISE

a. 1–5 years	
b. 6–9 years	
c. 10–19 years	
d. 20 years or more	

QG10 Which of the following ethnic groups does the owner of your business fall into?

MULTIPLE RESPONSE

a. NZ European	
b. Other European (specify)	
c. Māori	
d. Samoan	
e. Cook Island Māori	
f. Tongan	
g. Niuean	
h. Chinese	
i. Indian	
j. Other Asian (specify)	
k. Other (specify)	
l. Prefer not to say	

QG10b Which, if any, of the following professional or industry bodies does your business belong to?

MULTIPLE RESPONSE EXCEPT 'NONE', DO NOT RANDOMISE

1. Architectural Designers New Zealand (ADNZ)
2. Association of Consulting and Engineering (ACE)
3. Association of Wall and Ceiling Industries of NZ (AWCI)
4. Building and Construction Industry Training Organisation (BCITO)
5. Building Recruitment
6. Cement & Concrete Association of New Zealand (CCAN)
7. Claddings Institute of New Zealand (CINZ)
8. Climate Control Companies Association (CCCA)
9. Concrete NZ
10. Consulting Surveyors of New Zealand (CSNZ)
11. Engineering New Zealand
12. Floor NZ
13. Frame and Truss Manufacturers' Association of New Zealand (FTMA)
14. Future-Proof Building (FBP)
15. Master Electricians
16. Master Painters NZ Association (MPNZ)
17. Master Plumbers
18. National Association of Steel Framed Housing Inc (NASH)
19. National Kitchen & Bathroom Association of NZ (NKBA)
20. New Zealand Certified Builders Association (NZCB)
21. New Zealand Construction Industry Council (NZCIC)
22. New Zealand Geotechnical Society
23. New Zealand Green Building Council (NZGBC)
24. New Zealand Institute Landscape Architects (NZILA)
25. New Zealand Institute of Architects (NZIA)
26. New Zealand Institute of Building Surveyors (NZIBS)
27. New Zealand Institute of Buildings (NZIOB)
28. New Zealand Institute of Quantity Surveyors (NZIQS)
29. New Zealand Metal Roofing Manufacturers Association (NZMRM)
30. New Zealand Specialist Trade Contractors Federation (NZSTCF)
31. NZ Home Heating Association (HHA)
32. NZ Security Association (NZSA)
33. Registered Engineering Associate (REA)
34. Registered Master Builders Association (RMBA)
35. Registered Master Joiners (MJ)
36. Roofing Association of New Zealand (RANZ)
37. Specialist Trade Contractors Federation
38. Survey and Spatial New Zealand (SNZ)
39. The Building Hub
40. The Institute of Refrigeration Heating & Air Conditioning Engineers of NZ
41. Window & Glass Association of New Zealand
42. Other (Please specify)
43. None

QG11 Which of the following best describes your annual business turnover, before tax?

SINGLE RESPONSE

a. Less than \$100K	
b. \$100K to <\$500K	
c. \$500K to <\$1M	
d. \$1M to <\$5M	
e. \$5M to <\$10M	
f. \$10M to <\$20M	
g. \$20M to <\$50M	
h. \$50M or more	
i. Prefer not to say	
j. Don't know	

QG12 That's the end of our questions today. If you have anything else you wish to tell MBIE about how the building sector can best be helped to overcome the challenges presented by COVID-19, please write them down below. Please note that your comments (for this specific question only) will go directly to MBIE so if you wish to remain anonymous don't enter the name of you or your business.

Free text box

Add: "Thanks, I have no further comments" tick box

[TO SHOW TO OFFLINE RESPONDENTS ONLY].

QG8 Thanks, you're finished! To go into the draw to win 1 x \$500 Prezzy card or one of 5 x \$100 Prezzy cards, please enter your details below:

- Your name:
- Email address:
- Phone number:
- I would rather not provide my details:

[SHOW ALL]

QG9 Thanks again for your time. You may now close your browser. If you wish to learn more about this survey you can learn more here: <https://www.ipsos.com/en-nz/mbie-covid19-building-system-survey>

If you would like to learn more about the ways in which MBIE may be able to help your business please visit this page: <https://www.business.govt.nz/covid-19>

Worker Questionnaire

Final 200521

Job No:	21-000714-01	Type:	Online questionnaire; Building sector workers
Job Name:	MBIE COVID-19 and the Building System		

[TO SHOW TO OFFLINE RESPONDENTS ONLY].

Thanks, you're eligible for the survey. By completing this questionnaire you will go into the draw to win 1 x \$500 Prezzy card or one of 5 x \$100 Prezzy cards, and we will ask you for your contact details at the end so we can contact you if you are a winner. You don't have to provide your details if you don't want to, and your personal details will never be shared with anyone outside of Ipsos.

<'CONTINUE' BUTTON>

[SHOW ALL].

We are going to ask you a series of questions that look at different aspects of the building and construction process. We are interested to understand how these different aspects of the building process have been impacted by COVID-19. Please note when we refer to the time 'before COVID-19' we mean before mid-March 2020 (i.e. when the first Level 4 lockdown announced).

WA1 To begin, which of the following best describes you?

a. I am a middle / lower-level employee working in the building sector	CONTINUE
b. I am a senior-level employee working in the building sector	
c. I am a middle/lower-level manager working in the building sector	
d. I am an apprentice	

PROCESSES AND PROCEDURES

WB1 Thinking about the **time and effort** taken to get the following aspects of **paperwork, processes and procedures** done, how have these aspects changed when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
a. Building consents granted	1	2	3	4
b. Getting Titles, Drawings and similar council records	1	2	3	4
c. Building inspections completed	1	2	3	4
d. Finance and/or loans approved	1	2	3	4
e. Quotes from product suppliers (e.g. wholesalers or retailers)	1	2	3	4
f. Quotes from service suppliers (e.g. specialist workers)	1	2	3	4

PRODUCTS, MATERIALS AND PERFORMANCE

WC1 Looking now at **the products and materials** used in the building sector. How have the following aspects of **products and materials used in the building sector** been impacted when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
a. Being able to order the preferred products	1	2	3	4
b. Having the preferred products supplied on time	1	2	3	4
c. The quality of products that were supplied (including any substituted products)	1	2	3	4
d. The cost of products (excluding freight costs)	1	2	3	4
e. Freight costs	1	2	3	4
f. The cost of tools and other equipment	1	2	3	4

WC2A ASK ONLY IF WC1A=1

Which types of products are currently the most difficult to find and order?

SHOW WC2 ANSWER TABLE BELOW

WC2b ASK ONLY IF WC1B=1

Which types of products currently have the longest delivery timeframes / delays?

SHOW WC2 ANSWER TABLE BELOW

WC2c ASK ONLY IF WC1C=1

Which types of products currently have experienced the greatest quality problems since COVID-19? SHOW WC2 ANSWER TABLE BELOW

WC2d ASK ONLY IF WC1D OR WC1E=1 OR WC1F=1

Which types of products have increased the most in price, including freight costs?

SHOW WC2 ANSWER TABLE BELOW

WC2A-D ANSWER TABLE (DO NOT RANDOMISE).

MULTIPLE RESPONSE EXCEPT 'NONE' OR 'DON'T KNOW'. ANCHOR 'NONE' AND 'DON'T KNOW'.

1. Aggregates
2. Appliances e.g. whiteware, heat pumps, etc
3. Ceiling/Suspended ceiling material (wood, gypsum, vinyl, fibre cement etc.)
4. Cement
5. Doors and Windows (aluminium, PVC etc.)
6. Doors (e.g. entrance, room doors)
7. Door and window hardware
8. Electrical material (fittings, wires etc.)
9. Elevators/ escalators
10. Ceramic tiles
11. Curtain walls
12. Floor covering (hard material)
13. Furniture
14. Garage doors
15. Glass / glazing products
16. Hardware (nails, screws and bolts)
17. Insulation materials
18. Joinery and Kitchen cabinetry
19. Landscaping materials
20. LED lightbulbs
21. Manufacturing equipment
22. Mastic asphaltting
23. Mechanical services (heating/cooling systems, air-conditioning systems, fire systems etc)
24. Metal / steel products (e.g. gates, fences, metal doors etc)
25. Paints, stains, solvents, special liquids
26. Plumbing and gas fitting and drainage material (including tapware)
27. Sanitary fixtures
28. Ready concrete (Ready mix)
29. Reinforcing steel
30. Roofing material
31. Security systems
32. Special clothing e.g. PPE, safety
33. Stoneware (e.g. bricks, blocks etc)
34. Structural steel
35. Special and Technical equipment
36. Textiles e.g. carpeting, curtains
37. Timber - Laminated
38. Timber – structural ~~other~~
39. Timber – other ~~structural~~
40. Tools
41. Exterior wall cladding materials (e.g. metal cladding, wood cladding, cement board etc)
42. Interior wall lining material
43. Waterproofing materials
44. Wallpaper and other special finishes
45. Something else (please tell us what) <FREE TEXT BOX>
46. None of these
47. Don't know

WC2 Overall, are the product supply problems you are facing the most problematic for products produced in New Zealand or overseas?

SINGLE CHOICE

a. NZ-produced products	
b. Imported products	
c. Equally bad for NZ and imported products	
d. Don't know	

WC3 Thinking now about **changes in building designs and specifications** that may have arisen when compared to the way things were before COVID-19.

Which, if any, of the following changes do you believe have occurred in clients' design preferences and project-types when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

	THERE IS LESS INTEREST	NO CHANGE	THERE IS MORE INTEREST	DON'T KNOW / NOT APPLICABLE
a. Smaller offices and commercial space	1	2	3	4
b. Smaller houses	1	2	3	4
c. Larger houses	1	2	3	4
d. Multi-level buildings	1	2	3	4
e. Homes designed / modified for extended families / multi-generational living arrangement	1	2	3	4
f. Cheaper design / product designs	1	2	3	4
g. More expensive design / product designs	1	2	3	4
h. Home-offices (number, size etc)	1	2	3	4
i. More flexible residential design options	1	2	3	4
j. Design / specifications for less environmental impact	1	2	3	4
k. Interest in better-insulated buildings	1	2	3	4
l. Use of noise-reduction products / systems in interior walls	1	2	3	4
m. Using more durable materials	1	2	3	4
n. Using more energy efficient systems, designs and appliances	1	2	3	4
o. Using better heating and / or ventilation systems	1	2	3	4

WC4 How has the type of work your business does changed when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

	LESS OF THESE	NO CHANGE	MORE OF THESE	DON'T KNOW / NOT APPLICABLE
a. New commercial projects	1	2	3	4
b. New residential projects	1	2	3	4
c. New public sector projects	1	2	3	4
d. New infrastructure projects	1	2	3	4
e. Refurbishment or amendments to existing commercial buildings	1	2	3	4
f. Refurbishment or amendments to existing residential buildings	1	2	3	4
g. Refurbishment or amendments to existing public sector buildings	1	2	3	4
h. Maintenance or amendment to existing infrastructure	1	2	3	4

FINANCIAL, STAFF AND MANAGEMENT IMPACTS

WD2 Thinking now about the effects of COVID-19 on the **management** aspects of the business where you work.

How have the following aspects changed when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

RANDOMISE LIST BELOW	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
1. Ease of securing new work	1	2	3	4
2. Ease of project management, getting usual work done	1	2	3	4
3. Ease of retaining existing clients / customers	1	2	3	4
4. Number of costly, problematic project completion delays	1	2	3	4
5. Number of project cancellations	1	2	3	4
6. Ease of future planning / forecasting	1	2	3	4
7. Range of goods and services offered	1	2	3	4
8. The 'pipeline' of future confirmed work	1	2	3	4
9. Disputes around the quality of the work with clients	1	2	3	4
10. Disputes around the timeframes of the work with clients	1	2	3	4

WD3 Which, if any, of the following do you understand that your business managers have done, or are currently doing, to manage costs since COVID-19 arose?

MULTIPLE RESPONSE EXCEPT FOR N, RANDOMISE, ANCHOR N. AT LEAST ONE SELECTION PER COLUMN REQUIRED

	Last year (i.e. 12 months ago)	Currently
a. Cutting wages / salary for managers in the business	1	2
b. Cutting wages / salary for non-management staff	1	2
c. Asking staff to take unpaid leave / furlough	1	2
d. Asking staff to take paid Annual Leave	1	2
e. Asking staff to work reduced hours	1	2
f. Asking staff to work unpaid	1	2
g. Making staff redundant	1	2
h. Cancelling bonus / extra payments	1	2
i. Cancelling planned pay rises	1	2
j. Reducing operational overheads e.g. travel, capital purchases, rent etc	1	2
k. Negotiating new terms with your lender or investor	1	2
l. Reducing rent or rates payments	1	2
m. Offering fixed-term contracts instead of permanent roles	1	2
n. None of the above	1	2

WD4 We know that COVID-19 has affected the way that many people work.

How have the following aspects of your work changed when compared to the way things were before COVID-19?

RANDOMISE. SINGLE RESPONSE PER ROW

RANDOMISE LIST BELOW	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
11. Your pay rate	1	2	3	4
12. The amount of overtime / long hours you have worked	1	2	3	4
13. Workplace mental wellbeing	1	2	3	4
14. The amount of time 'wasted' not being able to do the work you plan to do	1	2	3	4
15. The ability for you to work flexibly (e.g. hours or places worked)	1	2	3	4
16. Your ability to get training/upskilling	1	2	3	4
17. Your physical safety at work	1	2	3	4
18. Your overall working conditions	1	2	3	4
19. Your overall work-life balance	1	2	3	4
20. Your job security	1	2	3	4
21. Your ability to use your skills at your work	1	2	3	4
22. Your autonomy at work (ability to self-manage)	1	2	3	4
23. Your normal working hours were reduced (which impacted on your income)	1	2	3	4

WD6 How much do you agree or disagree with each of the following statements about your place of work?

RANDOMISE. SINGLE RESPONSE PER ROW

	STRONGLY DISAGREE ←			→	STRONGLY AGREE	DON'T KNOW / NOT APPLICABLE
a. There are good structures and programmes to support the mental wellbeing of staff	1	2	3	4	5	6
b. There are good structures and programmes to support the physical wellbeing of staff	1	2	3	4	5	6
c. Staff at this workplace always feel physically safe at work	1	2	3	4	5	6
d. Staff at this workplace always feel emotionally safe at work	1	2	3	4	5	6
e. The management enables staff to care for their own wellbeing	1	2	3	4	5	6
f. The management enables staff to care for the wellbeing of others in their lives	1	2	3	4	5	6
g. The company genuinely cares for my wellbeing	1	2	3	4	5	6
h. My manager genuinely cares for my wellbeing and acts upon it	1	2	3	4	5	6
i. The company has structures and programmes that ensure my wellbeing at work is cared for	1	2	3	4	5	6
j. My team members/ colleagues care about my wellbeing	1	2	3	4	5	6

WD7 In general, how satisfied are you with your overall experience at work?

SINGLE CHOICE ONLY

a. Very satisfied	
b. Satisfied	
c. Neither satisfied nor dissatisfied	
d. Dissatisfied	
e. Very dissatisfied	

FUTURE EXPECTATIONS

WF1 So far, we have been discussing changes that have occurred since COVID-19 arose.

How do you believe the following things are likely to change for you over the next two years?

SINGLE RESPONSE PER ROW.

RANDOMISE LIST BELOW	Will be significantly worse in 2 years ←				→ Will be significantly better in 2 years			Don't know / Not applicable
a. Your overall working conditions	1	2	3	4	5	6	7	8
b. Your level of pay	1	2	3	4	5	6	7	8
c. Your work-life balance	1	2	3	4	5	6	7	8
d. Your job security	1	2	3	4	5	6	7	8

WF2 Which, if any, of the following things do you plan to do within the next 5 years?

MULTIPLE RESPONSE EXCEPT 'NONE' OR 'DON'T KNOW'. RANDOMISE. ANCHOR 'NONE' AND 'DON'T KNOW'.

a. Get extra qualifications, within the building and construction sector	
b. Leave your job for another job outside the building and construction sector	
c. Set up your own business, within the building and construction sector	
d. Look to get promoted at your current work	
e. Pause work so you can do extra training / study	
f. Pause work for personal reasons	
g. Leave New Zealand to live and work elsewhere	
h. Retire	
i. None of these	
j. Don't know	

INDUSTRY OBSERVATIONS / COMPLIANCE

And finally, COVID-19 has created a challenging work environment for some, which may have changed the way you might normally have worked.

WE1 Which of the following have you heard of other people experiencing, or you yourself have experienced in the past 12 months. Please remember that your responses will remain confidential.

RANDOMISE. ANCHOR 'NONE'. AT LEAST ONE SELECTION MUST BE MADE IN EACH COLUMN

	HAVE HEARD OF OTHER PEOPLE EXPERIENCING THIS	HAVE EXPERIENCED MYSELF
a. Being paid less than the minimum wage	1	2
b. Being unable to take leave and or meal/rest breaks	1	2
c. Not having the health and safety equipment that was needed for the usual work	1	2
d. Being asked to work more than the hours paid for	1	2
e. Being paid "under the table"	1	2
f. Having to "cut corners" due to work pressures	1	2
g. Being asked to work outside Visa conditions	1	2
h. Being asked to use substituted products without approval (e.g. without client or council approval)	1	2
i. Having pay reduced or deducted without staff approval	1	2
j. Being expected to complete tasks that were outside the staff members' skill sets	1	2
k. Being asked to stockpile order more products than needed	1	2
l. Being unable to follow the COVID-19 health and safety measures (e.g., the physical distancing)	1	2
m. None of these	1	2

WE2 FOR EACH CASE WHERE WE1A TO WE1K=1OR 2 ASK

Do you believe that these activities are occurring more or less often since COVID-19?

PIPE IN ALL FACTORS RATED '1 OR 2' IN WE1A-WEK	
a. More often	
b. Less often	
c. No change	
d. Don't know / Unsure	

Final profile questions

Thanks for your time so far today. Just a few more questions about you and where you work. Remember that your answers will be anonymously combined with other people completing the survey and your personal details will only be used for the prize draw, and then deleted.

WG1 Which one of the following best describes the main type of work that the business where you work does?

SINGLE RESPONSE

a. Construction	CONTINUE TO WG2
b. Project management	SKIP TO WG5
c. Specifier / Architecture / Engineer / Surveyor etc	
d. Support services, e.g. labour supply, admin, legal, equipment maintenance, property management etc	SKIP TO WG5
e. Manufacturing	SKIP TO WG5
f. Retail trade	
g. Wholesale trade	
h. Interior design	
i. Something else (please specify) <TEXT BOX>	

WG2 ASK IF WG1=A

What type of construction work are you mainly involved in?

SINGLE RESPONSE, DO NOT RANDOMISE

a. Air Conditioning and Heating Services	
b. Bricklaying Services	
c. Carpentry Services	
d. Concreting Services	
e. Electrical Services	
f. Fire and Security Alarm Installation Services	
g. Glazing Services	
h. Hire of Construction Machinery with Operator	
i. House Construction	
j. Land Development and Subdivision	
k. Landscape Construction Services	
l. Non-Residential Building Construction	
m. Other Building Installation Services	
n. Other Heavy and Civil Engineering Construction	
o. Other Residential Building Construction	
p. Painting and Decorating Services	
q. Plastering and Ceiling Services	
r. Plumbing Services	
s. Road and Bridge Construction	
t. Roofing Services	
u. Site Preparation Services	
v. Structural Steel Erection Services	
w. Tiling and Carpeting Services	
x. Other Construction Services	

WG5 Approximately how many staff are employed by the business / organisation where you work (in New Zealand)?

SINGLE RESPONSE PER COLUMN, DO NOT RANDOMISE

Full-time	Part-time (fewer than 30 hrs a week)
0	0
1-5	1-5
6-9	6-9
10-19	10-19
20-49	20-49
50-99	50-99
100+	100+
Don't know	Don't know

WG6a For how long have you worked in the building and construction sector?

SINGLE RESPONSE, DO NOT RANDOMISE

a. 1-2 years	
b. 3-5 years	
c. 6-9 years	
d. 10-12 years	
e. 13 years or more	

WG6b What is the average number of hours that you normally work in a week?

a. 1-9 hours	
b. 10-19 hours	
c. 20-29 hours	
d. 30-34 hours	
e. 35-39 hours	
f. 40 hours	
g. 41-44 hours	
h. 45-49 hours	
i. 50 hours or more	

WG6c Which, if any, of the following professional or industry bodies do you belong to?

MULTIPLE RESPONSE EXCEPT NONE, DO NOT RANDOMISE

1. Architectural Designers New Zealand (ADNZ)
2. Association of Consulting and Engineering (ACE)
3. Association of Wall and Ceiling Industries of NZ (AWCI)
4. Building and Construction Industry Training Organisation (BCITO)
5. Building Recruitment
6. Cement & Concrete Association of New Zealand (CCAN)
7. Claddings Institute of New Zealand (CINZ)
8. Climate Control Companies Association (CCCA)
9. Concrete NZ
10. Consulting Surveyors of New Zealand (CSNZ)
11. Engineering New Zealand
12. Floor NZ
13. Frame and Truss Manufacturers' Association of New Zealand (FTMA)
14. Future-Proof Building (FBP)
15. Master Electricians
16. Master Painters NZ Association (MPNZ)
17. Master Plumbers
18. National Association of Steel Framed Housing Inc (NASH)
19. National Kitchen & Bathroom Association of NZ (NKBA)
20. New Zealand Certified Builders Association (NZCB)
21. New Zealand Construction Industry Council (NZCIC)
22. New Zealand Geotechnical Society
23. New Zealand Green Building Council (NZGBC)
24. New Zealand Institute Landscape Architects (NZILA)
25. New Zealand Institute of Architects (NZIA)
26. New Zealand Institute of Building Surveyors (NZIBS)
27. New Zealand Institute of Buildings (NZIOB)
28. New Zealand Institute of Quantity Surveyors (NZIQS)
29. New Zealand Metal Roofing Manufacturers Association (NZMRM)
30. New Zealand Specialist Trade Contractors Federation (NZSTCF)
31. NZ Home Heating Association (HHA)
32. NZ Security Association (NZSA)
33. Registered Engineering Associate (REA)
34. Registered Master Builders Association (RMBA)
35. Registered Master Joiners (MJ)
36. Roofing Association of New Zealand (RANZ)
37. Specialist Trade Contractors Federation
38. Survey and Spatial New Zealand (SNZ)
39. The Building Hub
40. The Institute of Refrigeration Heating & Air Conditioning Engineers of NZ
41. Window & Glass Association of New Zealand
42. Other (Please specify)
43. None

WG7 Which region best describes where you mostly work?

SINGLE RESPONSE, DO NOT RANDOMISE

a. Throughout New Zealand (no specific region)	
b. Northland	
c. Auckland (from Bombay Hills to Wellsford, including the islands in the Hauraki Gulf)	
d. Waikato	
e. Bay of Plenty	
f. Gisborne	
g. Hawke's Bay	
h. Taranaki	
i. Manawatu / Whanganui	
j. Wellington (including Kapiti, Porirua, Hutt Valley and Wairarapa)	
k. Nelson or Tasman	
l. Marlborough	
m. West Coast	
n. Canterbury	
o. Otago	
p. Southland	
q. Chatham Islands	
r. Other, please specify	

WG8 In which of the following age groups do you belong?

SINGLE RESPONSE, DO NOT RANDOMISE

a. 15-20 years	
b. 21-29 years	
c. 30-39 years	
d. 40-49 years	
e. 50-59 years	
f. 60-69 years	
g. 70 years or more	

WG9 Do you identify as....?

SINGLE RESPONSE, DO NOT RANDOMISE

a. Female	
b. Male	
c. Another gender	

WG10 Which of the following ethnic groups do you fall into?

MULTIPLE RESPONSE

a. NZ European	
b. Other European (specify)	
c. Māori	
d. Samoan	
e. Cook Island Māori	
f. Tongan	
g. Niuean	
h. Chinese	
i. Indian	
j. Other Asian (specify)	
k. Other (specify)	
l. Prefer not to say	

WG11a Which of the following best describes how you are normally paid (for your main job in the building and construction sector)?

SINGLE CHOICE

a. I am on a fixed salary	
b. I am paid by the hour	
c. I am paid according to fixed-price contracts	
d. I am paid another way	

WG11 Which of the following best describes your personal annual income from all sources, before tax?

SINGLE RESPONSE

a. \$1-\$20,000	
b. \$20,001-\$50,000	
c. \$50,001-\$70,000	
d. \$70,001-\$100,000	
e. \$100,001-\$150,000	
f. \$150,001+	
g. Prefer not to say	
h. Don't know	

WG12 Which of these best describes your highest educational qualification? Please indicate if you earned it in New Zealand or the closest equivalent to a New Zealand qualification if obtained overseas.

SINGLE RESPONSE

	Gained in NZ	Gained overseas
a. Secondary/high school qualification	1	8
b. Certificate in building and construction industry training	2	9
c. Trade qualification (e.g. Civil Trades Certification)	3	10
d. Tertiary certificate/diploma (lower than Bachelor's degree)	4	11
e. Bachelor's degree (or equivalent)	5	12
f. Postgraduate certificate or higher (including Honours, Post-graduate Diploma, Masters, or PhD)	6	13
g. Other (specify)	7	14
h. No formal qualifications	15	

WG13a What is your citizenship/residency status?

SINGLE RESPONSE

a. I am a New Zealand Citizen/New Zealand Permanent Resident	SKIP TO Q14
b. I am a resident visa holder	CONTINUE TO Q13B
c. I am a temporary visa holder	CONTINUE TO Q13C

WG13b What type of resident visa are you currently on?

SINGLE RESPONSE, DO NOT RANDOMISE

a. Skilled Migrant Category visa	SKIP TO Q14
b. Residence from Work visa	
c. Business and investor visa	
d. Partnership visa	
e. Family visa (excluding partnership)	
f. Student visa	
g. Other (specify)	
h. Unsure	

WG13c What type of temporary visa are you currently on?

SINGLE RESPONSE, DO NOT RANDOMISE

a. Essential Skills visa	SKIP TO Q14
b. Work to Residence Visa	
c. Partnership visa	
d. Student visa	
e. Other (specify)	
f. Unsure	

WG14 For how many years have you lived in New Zealand?

SINGLE RESPONSE, DO NOT RANDOMISE

a. 1–5 years	
b. 6–9 years	
c. 10–19 years	
d. 20 years or more	

WG15 Is English your first language?

a. Yes	
b. No	

WG17 That's the end of our questions today. If you have anything else you wish to tell MBIE about how the building sector can best be helped to overcome the challenges presented by COVID-19, please write them down below.

Please note that your comments (for this specific question only) will go directly to MBIE so if you wish to remain anonymous don't enter the name of you or your business.

Free text box

Please add: 'Thanks, I have no further comments' tick box

[TO SHOW TO OFFLINE RESPONDENTS ONLY].

WG18 Thanks, you're finished! To go into the draw to win 1 x \$500 Prezzy card or one of 5 x \$100 Prezzy cards, please enter your details below:

- Your name:
- Email address:
- Phone number:
- I would rather not provide my details:

[SHOW ALL]

WG20 Thanks again for your time. You may now close your browser. If you wish to learn more about this survey you can learn more here: <https://www.ipsos.com/en-nz/mbie-covid19-building-system-survey>.

If this survey has raised your interest in seeking help concerning your job, you can find help and advice at this website: [Resolving problems » Employment New Zealand](#)

If you would like to anonymously and safely report illegal work practices at a business, you can find help and advice at this website: [Make a protected disclosure | Ombudsman New Zealand](#)

More information on COVID-19 guidance for the building and construction sector can be found by visiting this page: [COVID-19: Building and construction sector guidance | Building Performance](#).

End-User Questionnaire

Final v3 260521

Job No:	21-000714-01	Type:	Online questionnaire; End-Users
Job Name:	MBIE COVID-19 and the Building System		

HA1 Which of the following statements describe you? You can select every option that matches you. References to new homes can include investment or holiday properties.

MULTIPLE CHOICE EXCEPT I

a. I am currently having a new home built for me	CURRENT/ RECENT BUILDERS
b. I built (or had built for me) a new home that was finished after the Level 4 lockdown in March-April 2020	
c. I had plans to build a new home last year or this year, but starting the work has been cancelled or delayed due to COVID-19	BUILD DELAYERS
d. I have had some renovations completed on a home since the Level 4 lockdown in March-April 2020	CURRENT/ RECENT RENOVATORS
e. I have had some renovations started on a home since the Level 4 lockdown in March-April 2020	
f. I had plans to renovate sometime since last March, but starting the work has been cancelled or delayed due to COVID-19	RENOVATION DELAYERS
g. I am planning to have a new home built in the next 18 months	BUILD PLANNERS
h. I am planning to renovate a home in the next 18 months	RENO PLANNERS
i. I own a home but do not fit into any of the categories above	HOMEOWNERS
j. None of these	THANK & CLOSE

PROGRAMMERS: ASSIGN R TO GROUP BELOW DEPENDING ON ANSWERS TO HA1. IF MORE THAN ONE SELECTION MADE, ASSIGN TO A GROUP ON LEAST-FILLED QUOTA BASIS

CURRENT/ RECENT BUILDERS

GROUP 1: GO TO HB1

CURRENT/ RECENT RENOVATORS

GROUP 2: GO TO HB2

BUILD DELAYERS

GROUP 3: GO TO HB5A

RENOVATION DELAYERS

GROUP 4: GO TO HB6

BUILD PLANNERS

GROUP 5: GO TO HB9A

RENOVATION PLANNERS

GROUP 6: GO TO HB10

HOMEOWNERS

GROUP 7: GO TO HE1

BACKGROUND INFORMATION ABOUT THEIR BUILD

HB1a ASK GROUP 1 (CURRENT / RECENT BUILDERS)

Let's start by learning a little bit about you.

You have said that you have recently built a new home or currently have a new one being built.

Which of the following best describes this home?

SINGLE RESPONSE

a. Custom-designed and built for me from the very start	
b. Built according to a flexible template / plan from a home building company	
c. Bought 'off the plans' with minimal ability to change things	

HB1b Is this home an investment property?

a. Yes	ALL TO SKIP TO HC1
b. No	

HB2 ASK GROUP 2 (CURRENT / RECENT RENOVATORS)

Let's start by learning a little bit about you.

You have said that you have been working on some home renovations between March last year and now. Which of the following things have been involved with these renovations?

MULTIPLE RESPONSE

a. Major renovations (structural changes, extension, roof change, cladding change etc.)	
b. Minor renovations (fixing faulty parts, bathroom upgrade, replacing carpets, floor, rewiring etc.)	
c. Landscaping / outdoors work	
d. Interior/exterior painting and decorating	
e. Something else (please tell us what) <FREE TEXT BOX>	

HB3 Was a council Building Consent required for this work?

SHOW FOR EACH OPTION SELECTED IN HB2. SINGLE RESPONSE PER ROW

	YES	NO	DON'T KNOW
a. Major renovations (structural changes, extension, roof change, cladding change etc.)	1	2	3
b. Minor renovations (fixing faulty parts, bathroom upgrade, replacing carpets, floor, rewiring etc.)	1	2	3
c. Landscaping / outdoors work	1	2	3
d. Interior/exterior painting and decorating	1	2	3
e. PIPE IN ANSWER FROM HB2E	1	2	3

HB4a Who has done the majority of the following types of work?

SINGLE RESPONSE PER ROW.

SHOW FOR EACH OPTION SELECTED IN HB2

	Tradespeople	Non-trades people (non-professionals)	A mix of both
a. Major renovations (structural changes, extension, roof change, cladding change etc.)	1	2	3
b. Minor renovations (fixing faulty parts, bathroom upgrade, replacing carpets, floor, rewiring etc.)	1	2	3
c. Landscaping / outdoors work	1	2	3
d. Interior/exterior painting and decorating	1	2	3
e. PIPE IN ANSWER FROM HB2E	1	2	3

HB4b Is the home that these renovations are for an investment property?

a. Yes	ALL TO SKIP TO HC1
b. No	

HB5a ASK GROUP 3 (**BUILD DELAYERS**)

Let's start by learning a little bit about you.

You have said that you had plans to build a new home last year or this year, but starting the work has been cancelled or delayed due to COVID-19.

Which of the following best describes this home?

SINGLE RESPONSE

a. Custom-designed and built for me from the very start	
b. Built according to a flexible template / plan from a home building company	
c. Bought 'off the plans' with minimal ability to change things	

HB5b Is this home intended to be an investment property?

a. Yes	ALL TO SKIP TO HD1
b. No	

HB6 ASK GROUP 4 (RENOVATION DELAYERS)

You have said that you had plans to renovate sometime since last March, but starting the work has been cancelled or delayed due to COVID-19

Which of the following things were to have been involved with these renovations?

MULTIPLE RESPONSE

a. Major renovations (structural changes, extension, roof change, cladding change etc.)	
b. Minor renovations (fixing faulty parts, bathroom upgrade, replacing carpets, floor, rewiring etc.)	
c. Landscaping / outdoors work	
d. Interior/exterior painting and decorating	
e. Something else (please tell us what) <FREE TEXT BOX>	

HB7 Was a council Building Consent required for this work?

SHOW FOR EACH OPTION SELECTED IN HB6. SINGLE RESPONSE PER ROW

	YES	No	DON'T KNOW
a. Major renovations (structural changes, extension, roof change, cladding change etc.)	1	2	3
b. Minor renovations (fixing faulty parts, bathroom upgrade, replacing carpets, floor, rewiring etc.)	1	2	3
c. Landscaping / outdoors work	1	2	3
d. Interior/exterior painting and decorating	1	2	3
e. PIPE IN ANSWER FROM HB6E	1	2	3

HB8a Who was meant to have done the majority of the following types of work?

SINGLE RESPONSE PER ROW. SHOW FOR EACH OPTION SELECTED IN HB7

	Tradespeople	Non-trades people (non-professionals)	A mix of both
a. Major renovations (structural changes, extension, roof change, cladding change etc.)	1	2	3
b. Minor renovations (fixing faulty parts, bathroom upgrade, replacing carpets, floor, rewiring etc.)	1	2	3
c. Landscaping / outdoors work	1	2	3
d. Interior/exterior painting and decorating	1	2	3
e. Pipe in answer from HB6e	1	2	3

HB8b Is the home that these renovations are intended for an investment property?

a. Yes	ALL TO SKIP TO HD1
b. No	

HB9a ASK GROUP 5 (**BUILD PLANNERS**)

You have said that you are planning to have a new home built in the next 18 months.
Which of the following best describes the type of home you hope to build?

SINGLE RESPONSE

a. Custom-designed and built for me from the very start	
b. Built according to a flexible template / plan from a home building company	
c. Bought 'off the plans' with minimal ability to change things	

HB9b Is this home intended to be an investment property?

a. Yes	ALL TO SKIP TO HE1
b. No	

HB10 ASK GROUP 6 (**RENOVATION PLANNERS**)

You have said that you are planning to renovate a property in the next 18 months.
Which of the following things are likely to be involved with these renovations?

MULTIPLE RESPONSE

a. Major renovations (structural changes, extension, roof change, cladding change etc.)	
b. Minor renovations (fixing faulty parts, bathroom upgrade, replacing carpets, floor, rewiring etc.)	
c. Landscaping / outdoors work	
d. Interior/exterior painting and decorating	
e. Something else (please tell us what) <FREE TEXT BOX>	

HB11 Will a council Building Consent be required for this work?

SHOW FOR EACH OPTION SELECTED IN HB10. SINGLE RESPONSE PER ROW

	YES	No	DON'T KNOW
a. Major renovations (structural changes, extension, roof change, cladding change etc.)	1	2	3
b. Minor renovations (fixing faulty parts, bathroom upgrade, replacing carpets, floor, rewiring etc.)	1	2	3
c. Landscaping / outdoors work	1	2	3
d. Interior/exterior painting and decorating	1	2	3
e. Pipe in answer from HB10e	1	2	3

HB12 Who is intended to do the majority of the following types of work?

SINGLE RESPONSE PER ROW. SHOW FOR EACH OPTION SELECTED IN HB10

	Tradespeople	Non-trades people (non-professionals)	A mix of both
a. Major renovations (structural changes, extension, roof change, cladding change etc.)	1	2	3
b. Minor renovations (fixing faulty parts, bathroom upgrade, replacing carpets, floor, rewiring etc.)	1	2	3
c. Landscaping / outdoors work	1	2	3
d. Interior/exterior painting and decorating	1	2	3
e. PIPE IN ANSWER FROM HB10E	1	2	3

HB4b Is the home that these renovations are intended for an investment property?

a. Yes	ALL TO SKIP TO HE1
b. No	

CURRENT/ RECENT BUILDERS AND RENOVATORS SECTION: GROUPS 1 AND 2

PHRASE FOR GROUP 1

In case you have been working on more than one home-build since COVID-19, please consider the most recent home building work you have been involved in as you answer the rest of these questions.

PHRASE FOR GROUP 2

In case you have been working on more than one renovation project since COVID-19, please consider the most recent home renovation work you have been involved in as you answer the rest of these questions.

PHRASE FOR BOTH GROUPS 1 AND 2

You may have experienced changes or challenges to different aspects of your building or renovation project, due to the effects of COVID-19 on the building sector other aspects of New Zealand life. Please consider these as you answer the following questions.

HC1 Thinking about the **time and effort** taken for the following aspects of **paperwork, processes and procedures** involved with your building or renovation project, how do you think the following aspects changed when compared to the way things seemed to be before COVID-19?

SINGLE RESPONSE PER ROW. RANDOMISE.

	HAS GOT WORSE	NO CHANGE	HAS IMPROVED	DON'T KNOW / NOT APPLICABLE
a. Getting building consents granted	1	2	3	4
b. Getting Titles, Drawings and similar council records	1	2	3	4
c. Getting building inspections completed	1	2	3	4
d. Finance and/or loans approved	1	2	3	4
e. Quotes from product suppliers (e.g. wholesalers or retailers)	1	2	3	4
f. Quotes from service suppliers (e.g. specialist workers)	1	2	3	4

HC2 Thinking about the **appliances, products and materials** involved with your building or renovation project, how do you think the following aspects changed when compared to the way things seemed to be before COVID-19?

SINGLE RESPONSE PER ROW. RANDOMISE.

	HAS GOT WORSE	NO CHANGE	HAS IMPROVED	DON'T KNOW / NOT APPLICABLE
a. Being able to order the preferred products	1	2	3	4
b. Having the preferred products supplied on time	1	2	3	4
c. The quality of products that were supplied (including any substituted products)	1	2	3	4
d. The cost of products (including freight costs)	1	2	3	4

HC3A ASK ONLY IF HC2A=1

Which types of products are currently the most difficult to find and order?

SHOW HC3 ANSWER TABLE BELOW

HC3b ASK ONLY IF HC2B=1

Which types of products currently have the longest delivery timeframes / delays?

SHOW HC3 ANSWER TABLE BELOW

HC3c ASK ONLY IF HC2C=1

Which types of products currently have experienced the greatest quality problems since COVID-19?

SHOW HC3 ANSWER TABLE BELOW

HC3d ASK ONLY IF HC2D=1

Which types of products have increased the most in price (including freight costs)?

SHOW HC3 ANSWER TABLE BELOW

HC3A-D ANSWER TABLE (DO NOT RANDOMISE).

MULTIPLE RESPONSE EXCEPT 'NONE' OR 'DON'T KNOW'. ANCHOR 'NONE' AND 'DON'T KNOW'.

1. Aggregates
2. Appliances e.g. whiteware, heatpumps, etc
3. Ceiling/Suspended ceiling material (wood, gypsum, vinyl, fibre cement etc.)
4. Cement
5. Doors and Windows (aluminium, PVC etc.)
6. Doors (e.g. entrance, room doors)
7. Door and window hardware
8. Electrical material (fittings, wires etc.)
9. Elevators/ escalators
10. Ceramic tiles
11. Curtain walls,
12. Floor covering (hard material)
13. Furniture
14. Garage doors
15. Glass / glazing products
16. Hardware (nails, screws and bolts)
17. Insulation materials
18. Joinery and Kitchen cabinetry
19. Landscaping materials
20. LED lightbulbs
21. Manufacturing equipment
22. Mastic asphaltting
23. Mechanical services (heating/cooling systems, air-conditioning systems, fire systems etc)
24. Metal / steel products (e.g. gates, fences, metal doors etc)
25. Paints, stains, solvents, special liquids
26. Plumbing and gas fitting and drainage material (including tapware)
27. Sanitary fixtures
28. Ready concrete (Ready mix)
29. Reinforcing steel
30. Roofing material
31. Security systems
32. Special clothing e.g. PPE, safety
33. Stoneware (e.g. bricks, blocks etc)
34. Structural steel
35. Special and Technical equipment
36. Textiles e.g. carpeting, curtains
37. Timber - Laminated
38. Timber – structural
39. Timber – other
40. Tools
41. Exterior wall cladding materials (e.g. metal cladding, wood cladding, cement board etc)
42. Interior wall lining material
43. Waterproofing materials
44. Wallpaper and other special finishes
45. Something else (please tell us what) <FREE TEXT BOX>
46. None of these
47. Don't know

HC4 We understand that some people changed their **home build or renovation designs and specifications** because of COVID-19, possibly during the Level 4 lockdown period in which people had more time to think about their living arrangements.
Which, if any of the following aspects of your building or renovation project did you change because of COVID-19?

MULTIPLE RESPONSE EXCEPT 'NONE', RANDOMISE, ANCHOR 'NONE'. IF SELECT CODE A THEN CAN'T SELECT B. IF CHOOSE CODE E THEN CAN'T SELECT F – MUST BE MUTUALLY EXCLUSIVE.

RANDOMISE LIST BELOW	
a. Changing to a smaller house	
b. Changing to a larger house	
c. Changing from a multi-story to a single-story home design	
d. Changing the design to accommodate additional extended family / multi-generational living arrangements	
e. Choosing cheaper design / product designs	
f. Choosing more expensive design / product designs	
g. Adding or enlarging home-office spaces	
h. Choosing more flexible design options	
i. Using things that have less environmental impact when used	
j. Improving the insulation level of your home	
k. Using more noise-reduction products / systems in interior walls	
l. Using more durable materials	
m. Using more energy efficient systems, designs and appliances	
n. Using better heating and / or ventilation systems	
o. None of these	

FINANCIAL AND PROJECT MANAGEMENT IMPACTS

HC5 Thinking now about the effects of COVID-19 on the **management** of your building or renovation project. How has COVID-19 impacted on your project?

SINGLE RESPONSE PER ROW

RANDOMISE LIST BELOW	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
a. Ease of getting tradespeople to provide quotes for the work	1	2	3	4
b. Ease of getting tradespeople to do the work	1	2	3	4
c. Number of costly, problematic project completion delays	1	2	3	4
d. Ability to plan future building/renovating work	1	2	3	4

COMPLIANCE AND PERFORMANCE

HC6 COVID-19 has created a challenging environment. Which of the following, if any, have you experienced over the course of your building or renovation project in the past 12 months?

MULTIPLE CHOICE EXCEPT FOR NONE. RANDOMISE. ANCHOR NONE

a. Disputes around the project delivery dates	
b. Disputes around the quality of the work	
c. Spending more than the initially estimated budget for your project	
d. Tradespeople adding costs to your project, claiming that these were due to COVID-19	
e. You had to agree to using substituted products as the specified products were not available	
f. You charged penalties / got discounts from tradespeople working on your project due to delays arising from COVID-19	
g. You were offered special "cash rates" for your job	
h. You accepted a verbal quote, without anything being written down	
i. The work had to be redone because you were not happy about the quality of the work	
j. You asked for special "cash rates" for your job	
k. None of these	

HC7 Overall, how satisfied are you with this building or renovation project?

SINGLE CHOICE ONLY

a. Very satisfied	
b. Satisfied	
c. Neither satisfied nor dissatisfied	
d. Dissatisfied	
e. Very dissatisfied	

PERSONAL IMPACT

HC8 IF NO FACTORS IN HC1, HC2 OR HC5=1 SKIP TO HC9

You have said that the factors shown below appear to have got worse when compared to the way things seemed to be before COVID-19. Please select the ones that have had the greatest negative impact on your building or renovation project.

MULTIPLE RESPONSE EXCEPT 'NONE' OR 'DON'T KNOW'.

RANDOMISE. ANCHOR 'NONE' AND 'DON'T KNOW'.

PIPE IN ALL FACTORS RATED '1' IN QUESTIONS HC1, HC2, HC5	
998. None	
999. Don't know	

HC9 Building a new home or doing renovations can be stressful. How have the following issues changed in the past year?

RANDOMISE. SINGLE RESPONSE PER ROW

RANDOMISE LIST BELOW	This has worsened due to COVID-19	No change	This has improved due to COVID-19	Not applicable	Prefer not to say
a. Your financial situation	1	2	3	4	5
b. Your employment situation	1	2	3	4	5
c. Your physical well-being	1	2	3	4	5
d. Your mental well-being	1	2	3	4	5
e. Changes in your family situation	1	2	3	4	5

NOW SKIP TO FINAL SECTION, H11

BUILD DELAYERS AND RENOVATION DELAYERS SECTION: GROUPS 3 AND 4

PHRASE FOR GROUP 3

In case you have had more than one home-build delayed since COVID-19, please consider the most-delayed/cancelled recent home building work you have been involved in as you answer the rest of these questions.

PHRASE FOR GROUP 4

In case you have had more than one renovation project delayed since COVID-19, please consider the largest home renovation project that has been delayed/cancelled as you answer the rest of these questions.

PHRASE FOR BOTH GROUPS 3 AND 4

You may have experienced changes or challenges to different aspects of your delayed/cancelled building or renovation projects, due to the effects of COVID-19 on the building sector other aspects of New Zealand life. Please consider these as you answer the following questions.

HD1 Thinking about the **time and effort** taken for the following aspects of **paperwork, processes and procedures** involved with your delayed/cancelled building or renovation project, how do you think the following aspects have changed when compared to the way things seemed to be before COVID-19?

SINGLE RESPONSE PER ROW. RANDOMISE.

	HAS GOT WORSE	NO CHANGE	HAS IMPROVED	DON'T KNOW / NOT APPLICABLE
a. Getting building consents granted	1	2	3	4
b. Getting Titles, Drawings and similar council records	1	2	3	4
c. Finance and/or loans approved	1	2	3	4
d. Quotes from product suppliers (e.g. wholesalers or retailers)	1	2	3	4
e. Quotes from service suppliers (e.g. specialist workers)	1	2	3	4

HD2 Thinking about the **appliances, products and materials** involved with your delayed building or renovation project, how do you think the following aspects have changed when compared to the way things seemed to be before COVID-19?

SINGLE RESPONSE PER ROW. RANDOMISE.

	HAS GOT WORSE	NO CHANGE	HAS IMPROVED	DON'T KNOW / NOT APPLICABLE
a. Being able to order the preferred products	1	2	3	4
b. Having the preferred products supplied on time	1	2	3	4
c. The quality of products that were supplied (including any substituted products)	1	2	3	4
d. The cost of products (including freight costs)	1	2	3	4

HD3A ASK ONLY IF HD2A=1

Which types of products were the most difficult to find and order?

SHOW HD3 ANSWER TABLE BELOW

HD3b ASK ONLY IF HD2B=1

Which types of products had the longest delivery timeframes / delays?

SHOW HD3 ANSWER TABLE BELOW

HD3c ASK ONLY IF HD2C=1

Which types of products had the greatest quality problems since COVID-19?

SHOW HD3 ANSWER TABLE BELOW

HD3d ASK ONLY IF HD2D=1

Which types of products increased the most in price (including freight costs)?

SHOW HD3 ANSWER TABLE BELOW

HD3A-D ANSWER TABLE (DO NOT RANDOMISE).

MULTIPLE RESPONSE EXCEPT 'NONE' OR 'DON'T KNOW'. ANCHOR 'NONE' AND 'DON'T KNOW'.

1. Aggregates
2. Appliances e.g. whiteware, heatpumps, etc
3. Ceiling/Suspended ceiling material (wood, gypsum, vinyl, fibre cement etc.)
4. Cement
5. Doors and Windows (aluminium, PVC etc.)
6. Doors (e.g. entrance, room doors)
7. Door and window hardware
8. Electrical material (fittings, wires etc.)
9. Elevators/ escalators
10. Ceramic tiles
11. Curtain walls,
12. Floor covering (hard material)
13. Furniture
14. Garage doors
15. Glass / glazing products
16. Hardware (nails, screws and bolts)
17. Insulation materials
18. Joinery and Kitchen cabinetry
19. Landscaping materials
20. LED lightbulbs
21. Manufacturing equipment
22. Mastic asphaltting
23. Mechanical services (heating/cooling systems, air-conditioning systems, fire systems etc)
24. Metal / steel products (e.g. gates, fences, metal doors etc)
25. Paints, stains, solvents, special liquids
26. Plumbing and gas fitting and drainage material (including tapware)
27. Sanitary fixtures
28. Ready concrete (Ready mix)
29. Reinforcing steel
30. Roofing material
31. Security systems
32. Special clothing e.g. PPE, safety
33. Stoneware (e.g. bricks, blocks etc)
34. Structural steel
35. Special and Technical equipment
36. Textiles e.g. carpeting, curtains
37. Timber - Laminated
38. Timber – structural
39. Timber – other
40. Tools
41. Exterior wall cladding materials (e.g. metal cladding, wood cladding, cement board etc)
42. Interior wall lining material
43. Waterproofing materials
44. Wallpaper and other special finishes
45. Something else (please tell us what) <FREE TEXT BOX>
46. None of these
47. Don't know

HD4 We understand that some people changed their **home build or renovation designs and specifications** because of COVID-19, possibly during the Level 4 lockdown period in which people had more time to think about their living arrangements.

Which, if any of the following aspects of your delayed building or renovation project are you likely to change because of COVID-19?

MULTIPLE RESPONSE EXCEPT 'NONE', RANDOMISE, ANCHOR 'NONE'

RANDOMISE LIST BELOW	
a. Changing to a smaller house	
b. Changing to a larger house	
c. Changing from a multi-story to a single-story home design	
d. Changing the design to accommodate additional extended family / multi-generational living arrangements	
e. Choosing cheaper design / product designs	
f. Choosing more expensive design / product designs	
g. Adding or enlarging home-office spaces	
h. Choosing more flexible design options	
i. Using things that have less environmental impact when used	
j. Improving the insulation level of your home	
k. Using more noise-reduction products / systems in interior walls	
l. Using more durable materials	
m. Using more energy efficient systems, designs and appliances	
n. Using better heating and / or ventilation systems	
o. None of these	

FINANCIAL AND PROJECT MANAGEMENT IMPACTS

HD5 Thinking now about the effects of COVID-19 on the **management** of your delayed building or renovation project. How has COVID-19 impacted on your project?

RANDOMISE. SINGLE RESPONSE PER ROW

RANDOMISE LIST BELOW	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
a. Ease of getting tradespeople to provide quotes for the work	1	2	3	4
b. Ease of getting tradespeople to do the work	1	2	3	4
c. Number of costly, problematic project completion delays	1	2	3	4
d. Ability to plan future building/renovating work	1	2	3	4

COMPLIANCE AND PERFORMANCE

HD6 COVID-19 has created a challenging environment. Which of the following, if any, have you experienced over the course of your delayed building or renovation project?

MULTIPLE CHOICE EXCEPT FOR NONE. RANDOMISE. ANCHOR NONE

a. Disputes around the project delivery dates	
b. Spending more than the initially estimated budget for your project	
c. Tradespeople adding costs to your project, claiming that these were due to COVID-19	
d. You had to agree to using substituted products as the specified products were not available	
e. You charged penalties / got discounts from tradespeople working on your project due to delays arising from COVID-19	
f. You were offered special "cash rates" for your job	
g. You accepted a verbal quote, without anything written down	
h. You asked for special "cash rates" for your job	
i. None of these	

HD7 Overall, how satisfied are you with what has been achieved so far with your delayed building or renovation project?

SINGLE CHOICE ONLY

a. Very satisfied	
b. Satisfied	
c. Neither satisfied nor dissatisfied	
d. Dissatisfied	
e. Very dissatisfied	

PERSONAL IMPACT

HD8 IF NO FACTORS IN HD1, HD2 OR HD5=1 SKIP TO HD9

You have said that the factors shown below appear to have got worse when compared to the way things seemed to be before COVID-19. Please select the ones that have had the greatest negative impact on your delayed building or renovation project.

MULTIPLE RESPONSE EXCEPT 'NONE' OR 'DON'T KNOW'.

RANDOMISE. ANCHOR 'NONE' AND 'DON'T KNOW'.

PIPE IN ALL FACTORS RATED '1' IN QUESTIONS HD1, HD2, HD5	
y. None	
z. Don't know	

HD9 Building a new home or doing renovations can be stressful. How have the following issues changed in the past year?

SINGLE RESPONSE PER ROW

RANDOMISE LIST BELOW	This has worsened due to COVID-19	No change	This has improved due to COVID-19	Not applicable	Prefer not to say
a. Your financial situation	1	2	3	4	5
b. Your employment situation	1	2	3	4	5
c. Your physical well-being	1	2	3	4	5
d. Your mental well-being	1	2	3	4	5
e. Changes in your family situation	1	2	3	4	5

NOW SKIP TO FINAL SECTION, H11

HOMEOWNERS, BUILD PLANNERS AND RENOVATION PLANNERS SECTION: GROUPS 5, 6 AND 7

PHRASE FOR GROUP 5

In case you are planning more than one home-build, please consider the home building project you hope to start first as you answer the rest of these questions.

PHRASE FOR GROUP 6

In case you have more than one renovation project planned, please consider the home renovation project that you hope to start first as you answer the rest of these questions.

PHRASE FOR BOTH GROUPS 5 AND 6

You may have experienced changes or challenges to different aspects of your delayed building or renovation projects, due to the effects of COVID-19 on the building sector other aspects of New Zealand life. Please consider these as you answer the following questions.

PHRASE FOR GROUP 7

Although you have said you are not planning to build a new home or do any renovations in the next 18 months, we would like you to consider the possible changes or challenges to different aspects of building or renovation projects that may have occurred due to the effects of COVID-19 on the building sector other aspects of New Zealand life. You may have heard of changes in the sector, so please consider everything you may have heard, seen or read as you answer the following questions.

HE1 PHRASE FOR GROUPS 5 AND 6

Thinking about the **time and effort** taken for the following aspects of **paperwork, processes and procedures** involved with your planned building or renovation project, how do you think the following aspects may have changed when compared to the way things seemed to be before COVID-19?

PHRASE FOR GROUP 7

Thinking about the **time and effort** taken for the following aspects of **paperwork, processes and procedures** involved with building or renovation projects, how do you think the following aspects may have changed when compared to the way things seemed to be in New Zealand before COVID-19?

SINGLE RESPONSE PER ROW. RANDOMISE.

	WILL HAVE GOT WORSE	NO CHANGE	WILL HAVE IMPROVED	DON'T KNOW / NOT APPLICABLE
a. Getting building consents granted	1	2	3	4
b. Getting Titles, Drawings and similar council records	1	2	3	4
c. Getting building inspections completed	1	2	3	4
d. Finance and/or loans approved	1	2	3	4
e. Quotes from product suppliers (e.g. wholesalers or retailers)	1	2	3	4
f. Quotes from service suppliers (e.g. specialist workers)	1	2	3	4

HE2 PHRASE FOR GROUPS 5 AND 6

Thinking about the **appliances, products and materials** involved with your planned building or renovation project, how do you think the following aspects may have changed when compared to the way things seemed to be before COVID-19?

PHRASE FOR GROUP 7

Thinking about the **appliances, products and materials** involved with building or renovation projects, how do you think the following aspects may have changed when compared to the way things seemed to be in New Zealand before COVID-19?

SINGLE RESPONSE PER ROW. RANDOMISE.

	WILL HAVE GOT WORSE	NO CHANGE	WILL HAVE IMPROVED	DON'T KNOW / NOT APPLICABLE
a. Being able to order the preferred products	1	2	3	4
b. Having the preferred products supplied on time	1	2	3	4
c. The quality of products that were supplied (including any substituted products)	1	2	3	4
d. The cost of products (including freight costs)	1	2	3	4

HE4 PHRASE FOR GROUPS 5 AND 6

We understand that some people changed their planned **home build or renovation designs and specifications** because of COVID-19, possibly during the Level 4 lockdown period in which people had more time to think about their living arrangements.

Which, if any of the following aspects of your planned building or renovation project will you consider changing as a result of COVID-19?

PHRASE FOR GROUP 7

We understand that some people changed their planned **home build or renovation designs and specifications** because of COVID-19, possibly during the Level 4 lockdown period in which people had more time to think about their living arrangements.

Which, if any of the following aspects of your home might you consider changing as a result of COVID-19?

MULTIPLE RESPONSE EXCEPT 'NONE', RANDOMISE, ANCHOR 'NONE'

RANDOMISE LIST BELOW	
a. Changing to a smaller house	
b. Changing to a larger house	
c. Changing from a multi-story to a single-story home design	
d. Changing the design to accommodate additional extended family / multi-generational living arrangements	
e. Choosing cheaper design / product designs	
f. Choosing more expensive design / product designs	
g. Adding or enlarging home-office spaces	
h. Choosing more flexible design options	
i. Using things that have less environmental impact when used	
j. Improving the insulation level of your home	
k. Using more noise-reduction products / systems in interior walls	
l. Using more durable materials	
m. Using more energy efficient systems, designs and appliances	
n. Using better heating and / or ventilation systems	
o. None of these	

FINANCIAL AND PROJECT MANAGEMENT IMPACTS

HE5 PHRASE FOR GROUPS 5 AND 6

Thinking now about the effects of COVID-19 on the **management** of your planned building or renovation project. How has COVID-19 impacted on your planned project?

PHRASE FOR GROUP 7

Thinking now about the effects of COVID-19 on the **management** of building or renovation projects in New Zealand. How do you believe that COVID-19 has impacted on building or renovation projects?

SINGLE RESPONSE PER ROW

RANDOMISE LIST BELOW	HAS GOT WORSE	NO CHANGE	HAS GOT BETTER	DON'T KNOW / NOT APPLICABLE
a. Ease of getting tradespeople to provide quotes for the work	1	2	3	4
b. Ease of getting tradespeople to do the work	1	2	3	4
c. Number of costly, problematic project completion delays	1	2	3	4
d. Ability to plan future building/renovating work	1	2	3	4

COMPLIANCE AND PERFORMANCE

HE6 PHRASE FOR GROUPS 5 AND 6

COVID-19 has created a challenging environment. Which of the following, if any, do you expect to experience over the course of your planned building or renovation project?

PHRASE FOR GROUP 7

COVID-19 has created a challenging environment. Which of the following, if any, do you expect to experience when carrying out any future building or renovation projects?

MULTIPLE CHOICE EXCEPT FOR NONE. RANDOMISE. ANCHOR NONE

USE MAIN TEXT UNLESS BLUE OPTION IS SHOWN – SHOW BLUE OPTIONS TO GROUP 7 RESPONDENTS

a. Disputes around the project delivery dates	
b. Spending more than the initially estimated budget for your project Spending more than the initially estimated budget for your project	
c. Tradespeople adding costs to your project, claiming that these are due to COVID-19 Tradespeople adding costs to projects, claiming that these are due to COVID-19	
d. You have to agree to using substituted products as the specified products are not available You will have to agree to use substituted products as the specified products are not available	
e. You will charge penalties / ask for discounts from tradespeople working on your project due to delays arising from COVID-19 You will charge penalties / ask for discounts from tradespeople due to delays arising from COVID-19	
f. You will be offered special “cash rates” for your job You will be offered special “cash rates” for your job	
g. You will accept verbal quotes (rather than having anything written down) You will accept verbal quotes (rather than having anything written down)	
h. The work will need to be redone because you won’t be happy with the quality of the work The work will need to be redone because you won’t be happy with the quality of the work	
i. You will ask for special “cash rates” for your job You will ask for special “cash rates” for your job	
j. None of these	

PERSONAL IMPACT

HE8 ASK GROUPS 5 & 6 ONLY.

IF NO FACTORS IN HE1, HE2 OR HE5=1 SKIP TO HE9

You have said that the factors shown below appear to have got worse when compared to the way things seemed to be before COVID-19. Please select the ones that have had the greatest negative impact on your planned building or renovation project.

MULTIPLE RESPONSE EXCEPT 'NONE' OR 'DON'T KNOW'.

RANDOMISE. ANCHOR 'NONE' AND 'DON'T KNOW'.

PIPE IN ALL FACTORS RATED '1' IN QUESTIONS HE1, HE2, HE5	
y. None	
z. Don't know	

HE9 PHRASE FOR GROUPS 5 AND 6

Planning a new home build or renovations can be stressful. How have the following issues changed in the past year?

PHRASE FOR GROUP 7

COVID-19 has been stressful for many people. How have the following issues changed in the past year?

SINGLE RESPONSE PER ROW

RANDOMISE LIST BELOW	This has worsened due to COVID-19	No change	This has improved due to COVID-19	Not applicable	Prefer not to say
a. Your financial situation	1	2	3	4	5
b. Your employment situation	1	2	3	4	5
c. Your physical well-being	1	2	3	4	5
d. Your mental well-being	1	2	3	4	5
e. Changes in your family situation	1	2	3	4	5

FINAL SECTION: ASK ALL

INDUSTRY PERCEPTIONS

HI1 To the best of your knowledge, to what degree do you agree or disagree with the following statements about the New Zealand residential building sector?

SINGLE RESPONSE PER ROW.

RANDOMISE LIST BELOW	STRONGLY DISAGREE ←	STRONGLY AGREE →	Don't know / Not applicable
a. Most tradespeople will 'cut corners' to save time or money	1 2 3 4 7	5 6	8
b. Most tradespeople offer good value for money	1 2 3 4 7	5 6	8
c. People can have trust and confidence in their tradespeople to get the job done well	1 2 3 4 7	5 6	8
d. Most tradespeople will comply with the necessary regulations and standards.	1 2 3 4 7	5 6	8

HI2. And do you think COVID-19 has increased or decreased the likelihood of these things?

SINGLE RESPONSE PER ROW.

RANDOMISE LIST BELOW	This has decreased due to COVID-19	No change	This has increased due to COVID-19	Not applicable
a. Tradespeople 'cutting corners' to save time or money	1	2	3	4
b. Tradespeople offering good value for money	1	2	3	4
c. People being able to have trust and confidence in their tradespeople to get the job done well	1	2	3	4
d. Tradespeople complying with the necessary regulations and standards	1	2	3	4

FUTURE EXPECTATIONS

HF1 So far we have been discussing changes that have occurred since COVID-19 arose. How do you believe the following things are likely to change in New Zealand, over the next two years?

SINGLE RESPONSE PER ROW.

RANDOMISE LIST BELOW	Will get worse	No change	Will improve	Don't know
a. Ease and timeliness of working with councils	1	2	3	4
b. How 'friendly' banks and lenders will be to people getting mortgages or loans for new homes or renovations	1	2	3	4
c. Ease and timeliness of working with service suppliers (e.g. tradespeople)	1	2	3	4
d. Ability to find, order and receive preferred products within the required timeframes	1	2	3	4
e. The overall cost of products	1	2	3	4
f. Availability of suitable tradespeople	1	2	3	4

FINAL PROFILE QUESTIONS

Thanks for your time so far today. Just a few more questions about you. Remember that your answers will be anonymously combined with other people completing the survey.

HZ1 Thinking about your own situation, how likely do you think you are to do each of the following, over the next two years?

SINGLE RESPONSE PER ROW.

RANDOMISE LIST BELOW	Less likely	No change	More likely	Don't know / not applicable
a. Move to a town or city to get cheaper housing	1	2	3	4
b. Do more DIY because of a lack of tradespeople	1	2	3	4
c. Struggle to pay your mortgage, rent or other everyday bills	1	2	3	4
d. Delay building/renovation work due to a lack of tradespeople	1	2	3	4
e. Delay building/renovation work due to rising costs (e.g., products, labour etc.)	1	2	3	4

HZ2 Which of the following match your current situation?

MULTIPLE RESPONSE

a. I own or part-own the place where I live	
b. I own or part-own other residential property in New Zealand	
c. I am a tenant or boarder where I currently live, paying rent/board	
d. I do not own my current place of residence but do not pay rent or board either	

HZ3 PHRASE FOR GROUPS 1, 2

Which region best describes the location of the building or renovation work that you recently had done (discussed during this survey)?

PHRASE FOR GROUPS 3, 4

Which region best describes the location of your delayed building or renovation work (discussed during this survey)?

PHRASE FOR GROUPS 5 AND 6

Which region best describes the location of the building work that you are planning for the next 18 months?

PHRASE FOR GROUP 7

In which region do you usually live?

SINGLE RESPONSE, DO NOT RANDOMISE

s. Northland	
t. Auckland (from Bombay Hills to Wellsford, incl. the islands in the Hauraki Gulf)	
u. Waikato	
v. Bay of Plenty	
w. Gisborne	
x. Hawke's Bay	
y. Taranaki	
z. Manawatu / Whanganui	
aa. Wellington (including Kapiti, Porirua, Hutt Valley and Wairarapa)	
bb. Nelson or Tasman	
cc. Marlborough	
dd. West Coast	
ee. Canterbury	
ff. Otago	
gg. Southland	
hh. Chatham Islands	
ii. Other, please specify	

HZ4 PHRASE FOR GROUPS 1, 2

Which of the following best describes the location of the building or renovation work that you recently had done (discussed during this survey)?

PHRASE FOR GROUPS 3, 4

Which of the following best describes the location of your delayed building or renovation work (discussed during this survey)?

PHRASE FOR GROUPS 5, 6

Which of the following best describes the location of the building or renovation work that you are planning for the next 18 months?

PHRASE FOR GROUP 7

Which of the following best describes where you usually live?

SINGLE RESPONSE, DO NOT RANDOMISE	
a. A main city (e.g. Auckland, Hamilton, Wellington, Tauranga, Christchurch, Dunedin)	
b. A provincial town or smaller city (e.g. Whanganui, Invercargill, Gisborne etc)	
c. A rural area / settlement / village (e.g. Hamner Springs Village)	

HZ5 In which of the following age groups do you belong?

SINGLE RESPONSE, DO NOT RANDOMISE

h. 15-20 years	
i. 21-29 years	
j. 30-39 years	
k. 40-49 years	
l. 50-59 years	
m. 60-69 years	
n. 70 years or more	

HZ6 Do you identify as....?

SINGLE RESPONSE, DO NOT RANDOMISE

d. Female	
e. Male	
f. Another gender	

HZ7 Which of the following ethnic groups do you fall into?

MULTIPLE RESPONSE

y. NZ European	
z. Other European (specify)	
aa. Māori	
bb. Samoan	
cc. Cook Island Māori	
dd. Tongan	
ee. Niuean	
ff. Chinese	
gg. Indian	
hh. Other Asian (specify)	
ii. Other (specify)	
jj. Prefer not to say	

HZ8 Which of the following best describes your household's annual income from all sources, before tax?

SINGLE RESPONSE

kk. \$1-\$20,000	
ll. \$20,001-\$50,000	
mm. \$50,001-\$70,000	
nn. \$70,001-\$100,000	
oo. \$100,001-\$150,000	
pp. \$150,001+	
qq. Prefer not to say	
rr. Don't know	

HZ9 Which of these best describes your highest educational qualification?

SINGLE RESPONSE

	Gained in NZ	Gained overseas
i. Secondary / high school qualification	1	9
j. Certificate in building and construction industry training	2	10
k. Trade qualification (e.g. Civil Trades Certification)	3	11
l. Tertiary certificate / diploma (lower than Bachelor's degree)	4	12
m. Bachelor's degree (or equivalent)	5	13
n. Postgraduate certificate or higher (including Honours, Post-graduate Diploma, Masters, or PhD)	6	14
o. Other (specify)	7	15
p. No formal qualifications	8	

HZ10 Which of the following categories best describes your current occupational group? If you have become temporarily unemployed due to Covid-19 you can answer with your normal occupation.

SINGLE RESPONSE

a. Manager / Business owner / Farm owner	
b. Professional	
c. Technician and Trades Worker	
d. Community and Personal Service Worker	
e. Clerical and Administrative Worker	
f. Sales Worker / Retail	
g. Machinery Operators and Driver	
h. Labourer	
i. Retired	
j. Student	
k. Home Duties	
l. Beneficiary	
m. Other (specify)	
n. Prefer not to say	

HZ11 What is your citizenship / residency status?

SINGLE RESPONSE

a. I am a New Zealand Citizen / New Zealand Permanent Resident	SKIP TO HZ14
b. I am a resident visa holder	CONTINUE TO HZ12
c. I am a temporary visa holder	SKIP TO HZ13

HZ12 What type of resident visa are you currently on?

SINGLE RESPONSE, DO NOT RANDOMISE

i. Skilled Migrant Category visa	SKIP TO HZ15
j. Residence from Work visa	
k. Business and investor visa	
l. Partnership visa	
m. Family visa (excluding partnership)	
n. Student visa	
o. Other (specify)	
p. Unsure	

HZ13 What type of temporary visa are you currently on?

SINGLE RESPONSE, DO NOT RANDOMISE

a. Essential Skills visa	SKIP TO HZ15
b. Work to Residence Visa	
c. Partnership visa	
d. Student visa	
e. Other (specify)	
f. Unsure	

HZ14. Were you born in New Zealand?

e. Yes	
f. No	

HZ15 In total, for how many years have you lived in New Zealand? If you have lived here for different periods, please tell us how long you have been living in New Zealand since last moving here.

SINGLE RESPONSE, DO NOT RANDOMISE

a. Up to 5 years	
b. 6–9 years	
c. 10–19 years	
d. 20 years or more	

HZ16 IF HZ15 = a ASK:

Have you come to live in New Zealand because of COVID-19?

SINGLE RESPONSE, DO NOT RANDOMISE

a. Yes	
b. No	

HZ17 That's the end of our questions today. If you have anything else you wish to tell MBIE about how the building sector can best be helped to overcome the challenges presented by COVID-19, please write them down below. Please note that your comments (on this specific question only) will go directly to MBIE so if you wish to remain anonymous don't enter your name or the name of any business.

Free text box

Thanks again for your time. You may now close your browser.

Appendix F

Key Dates: COVID-19 Alert Levels and the timeline of this research

The management of the COVID-19 pandemic in New Zealand has involved several periods of time in which normal business activity was restricted, in line with the 'Alert Level' being followed for a given time and place:

- **Alert Level 4** means that no building and construction work can be conducted unless deemed essential.
- **Alert Level 3** means that building and construction work can be conducted with the necessary social distancing and location tracking, and that hygiene requirements are mandatory. Inter-regional travel is limited.
- **Alert Level 2** means that building and construction work can be conducted with necessary social distancing, location tracking and with hygiene requirements recommended, but this is not mandatory. Limits on the number of staff allowed on location are applied. Inter-regional travel is allowed.
- **Alert Level 1** means that building and construction work can be conducted with necessary social distancing, location tracking and hygiene requirements are recommended but not mandatory. Inter-regional travel is allowed.

Key changes in Alert Level (New Zealand Government, 2021b) that impacted the building and construction sector prior to, and during this research, are outlined below in Table 2.

Table 81: COVID-19 Alert Levels and the timeline of this research

Key dates	Key Alert Level changes and the project Milestones
23 March 2020	New Zealand moved to Alert Level 3
25 March 2020	New Zealand moved to Alert Level 4
27 April 2020	New Zealand moved to Alert Level 3
13 May 2020	New Zealand moved to Alert Level 2
8 June 2020	New Zealand moved to Alert Level 1
12 August 2020	Auckland moved to Alert Level 3. The rest of NZ moved Alert Level 2
30 August 2020	Auckland moved to Alert Level 2
21 September 2020	All regions except Auckland moved to Alert Level 1
7 October 2020	Auckland moved to Alert Level 1
14 February 2021	Auckland moved to Alert Level 3. The rest of NZ moved to Alert Level 2
17 February 2021	Auckland moved to Alert Level 2. The rest of NZ moved to Alert Level 1
22 February 2021	Auckland moved to Alert Level 1
28 February 2021	Auckland moved to Alert Level 3. The rest of NZ moved to Alert Level 2

7 March 2021	Auckland moved to Alert Level 2. The rest of NZ moved to Alert Level 1
12 March 2021	Auckland moved to Alert Level 1. All of NZ now at Alert Level 1
30 March 2021	Qualitative fieldwork started
22 April 2021	Qualitative fieldwork completed
3 June 2021	Quantitative survey fieldwork started
23 June 2021	Wellington moved to Alert Level 2. The rest of NZ remained at Alert Level 1
29 June 2021	Wellington moved to Alert Level 1. All of NZ now at Alert Level 1
9 July 2021	Quantitative survey fieldwork completed

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