MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

research NEW ZEALAND

Te Kāwanatanga o Aotearoa
New Zealand Government

State of the Building and Construction Sector

ANNUAL MONITOR 2021-2022 // TECHNICAL REPORT

MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

Ministry of Business, Innovation and Employment (MBIE)
Hīkina Whakatutuki – Lifting to make successful

MBIE develops and delivers policy, services, advice and regulation to support economic growth and the prosperity and wellbeing of New Zealanders.

MORE INFORMATION

Information, examples and answers to your questions about the topics covered here can be found on our website: **www.mbie.govt.nz**.

DISCLAIMER

This document is a guide only. It should not be used as a substitute for legislation or legal advice. The Ministry of Business, Innovation and Employment is not responsible for the results of any actions taken on the basis of information in this document, or for any errors or omissions.

ONLINE: ISSN 2815-9942

NOVEMBER 2022

Research New Zealand was commissioned to conduct this research. Authorship of this report is attributed to: Emanuel Kalafatelis, Ciaran Madden, Annita Wood, Ian Yin, and Brad Olsen (Infometrics). Support for this project was provided by the MBIE project team: Dr Alice Cleland, Dr Iman Khajehzadeh, and Janette Bartolo-Doblas.

Please cite this report as: Research New Zealand (2022). *State of the building and construction sector: Annual monitor 2021-2022. Technical report.* Wellington: MBIE.

Contents

Contents **3**

List of Figures **4**

List of Tables **4**

1.0 Executive summary **8**

1.1 Purpose and objectives *8*

1.2 Method and limitations *9*

2.0 Surveyed respondents **15**

2.1 Business owners/managers *16*

2.2 Workers *23*

2.3 End-users *28*

3.0 The last 12 months (YE 31 March 2022) **35**

3.1 Financial performance as reported by business owners/managers *36*

3.2 Reasons for financial performance *39*

3.3 Business performance as reported by workers *41*

3.4 Delaying building and renovation work *43*

3.5 Impacts of delays *45*

3.6 Making changes to plans *46*

3.7 Business owners'/managers' response to the operating conditions and their business performance *48*

4.0 COVID-19 pandemic impacts and readiness for further disruption **52**

4.1 Impact of the COVID-19 pandemic *53*

4.2 Preparedness for further disruption *57*

5.0 Compliance, consumer protection and contracting **60**

5.1 Compliance *61*

5.2 Consumer protection *67*

5.3 Contracting *69*

6.0 Sector opinions on building quality and efficiency, trust and confidence **70**
6.1 General opinions about the building and construction sector *71*
6.2 Trust and confidence in sector 'players' *75*
6.3 Remedial work *81*
6.4 Satisfaction with quality of build or renovation *84*

7.0 Future expectations and plans **87**
7.1 Business confidence, forward work and future business plans *88*
7.2 Workers' satisfaction, expectations and future plans *98*
7.3 End-users' future building plans *112*

8.0 Changes to staff numbers, future requirements, plans and barriers **114**
8.1 Changes in staff numbers *115*
8.2 Types of staff required *118*
8.3 Recruitment difficulties *120*
8.4 Reasons for recruitment difficulties *123*

9.0 Future building trends, capacities and capabilities **124**
9.1 Adoption of new trends by business owners/managers *125*
9.2 Adoption of new trends by workers *132*
9.3 Adoption of new trends by end-users *139*

Appendix A: The Building and Construction Sector – Industries in scope **144**

Appendix B: Survey questionnaires **146**

Appendix C: Weighting parameters – business owners/managers and workers **234**

Appendix D: Respondent profiles – business owners and workers (pre- and post-weighted samples) and end-users (unweighted) **237**

List of Figures

Figure 1: Business owners/managers – Opinions about financial performance last 12 months ... 36
Figure 2: Business owners/managers – Reasons for positive financial performance ... 39
Figure 3: Business owners/managers – Reasons for negative financial performance ... 40
Figure 4: Workers – Opinions about how busy their employer was in last 12 months ... 41
Figure 5: Business owners/managers & Workers – Impact of the COVID-19 pandemic ... 54
Figure 6: Business owners/managers – Preparedness for further disruption ... 58
Figure 7: Business owners/managers – Complying behaviour and practices ... 62
Figure 8: Workers – Complying behaviour and practices ... 63
Figure 9: Business owners/managers – Opinions about the building and construction sector ... 72
Figure 10: Workers – Opinions about the building and construction sector ... 73
Figure 11: Business owners/managers & Workers – Trust and confidence ... 77
Figure 12: Business owners/managers – Areas of help and advice by business plans – 2022 compared with 2021 ... 97
Figure 13: Workers – Job and employer satisfaction ... 98
Figure 14: Workers – Future Plans ... 104
Figure 15: Workers – Future expectations ... 106
Figure 16: Business owners/managers – Types of staff wanted and having difficulty recruiting ... 120
Figure 17: Business owners/managers – Reasons for having recruitment difficulties ... 123
Figure 18: Business owners/managers – Consumer enquiries about new trends ... 126
Figure 19: Workers – Interest in developing personal capability in relation to new trends ... 132

List of Tables

Table 1: End-user building/renovating activity ... 12
Table 2: Prioritisation ... 13
Table 3: Businesses - Industry category ... 16
Table 4: Businesses - Operating regions ... 17
Table 5: Businesses - Business size ... 17
Table 6: Businesses - Years in operation ... 18
Table 7: Businesses - Turnover ... 19
Table 8: Businesses - Industry/professional body affiliation ... 20
Table 9: Business owners/managers - Age ... 21
Table 10: Business owners/managers - Ethnicity ... 22
Table 11: Business owners/managers - Business ethnic identification ... 22
Table 12: Workers - Ethnicity ... 23
Table 13: Workers - Industry category ... 24
Table 14: Workers – Experience ... 24
Table 15: Workers – Age ... 25
Table 16: Workers – Years in sector ... 25

Table 17: Workers – Highest educational qualification 26
Table 18: Workers – Personal income.. 27
Table 19: End-users – Home ownership status 28
Table 20: End-users – Building and renovating activity 29
Table 21: End-users – Type of new buildings being built.. 30
Table 22: End-users – Size of new builds 30
Table 23: End-users – Characteristics of new builds 31
Table 24: End-users – Design characteristics of new builds 31
Table 25: End-users – Age 32
Table 26: End-users – Employment status 32
Table 27: End-users – Ethnicity 33
Table 28: End-users – Region 33
Table 29: End-users – Urbanicity.. 34
Table 30: Business owners/managers – Opinions about financial performance last 12 months 37
Table 31: Business owners/managers – Financial performance compared with pre-COVID-19 pandemic year 38
Table 32: Workers – Opinions about how busy their employer was in last 12 months 42
Table 33: Workers – Busyness compared with pre-COVID-19 pandemic year 42
Table 34: End-users – Delayers – Stage at which delayed plans.. 43
Table 35: End-users – Delayers – Reasons for delaying builds and renovations 44
Table 36: End-users – Recent home builders & renovators – Reasons for delays............ 44
Table 37: End-users – Impact of delays.. 45
Table 38: End-users – Reasons for changes 46
Table 39: End-users – Result of changes... 47
Table 40: Business owners/managers – Response to operating conditions and financial performance 49
Table 41: Business owners/managers – Changes in worker numbers compared with 12 months ago by experience level (Businesses whose financial performance was positive) 50
Table 42: Business owners/managers – Changes in worker numbers compared with 12 months ago by level (businesses whose financial performance was negative).......... 51
Table 43: End-users – Impact of the COVID-19 pandemic 56
Table 44: Workers – Preparedness for further disruption.. 59
Table 45: End-users – Complying behaviour and practices 64
Table 46: Business owners/managers – Complying behaviour and practices – 2022 compared with 2021........ 65
Table 47: Workers – Complying behaviour and practices – 2022 compared with 2021 ... 66
Table 48: End-users – Familiarity with legal protection.. 67
Table 49: End-users – Satisfaction with legal protection 67
Table 50: Recent home builders and renovators – Satisfaction with legal protection available to consumers by familiarity........ 68
Table 51: End-users – Written contracts... 69
Table 52: Business owners/managers – Trust and confidence in ‘players’ in the sector .. 75

Table 53: Business owners/managers – Trust and confidence in councils and local government ... 76
Table 54: Workers – Trust and confidence in councils and local government ... 78
Table 55: End-users – Trust and confidence in ‘players’ in the sector ... 79
Table 56: End-users – Beliefs about tradespeople ... 80
Table 57: End-users – Beliefs about tradespeople – 2022 compared with 2021 ... 80
Table 58: End-users - Recent home builders & renovators – Quality issues requiring remediation ... 81
Table 59: End-users – Recent home builders & renovators – Timeframes to resolve remediation issues ... 82
Table 60: End-users – Recent home builders & renovators – Parties involved in remediation ... 83
Table 61: End-users – Recent home builders & renovators – Satisfaction level on quality of new build/ renovation ... 84
Table 62: End-users – Recent home builders & renovators – Estimated value of building work ... 85
Table 63: End-users – Recent home builders & renovators – Estimated value higher or lower than original quotation ... 85
Table 64: End-users – Recent home builders & renovators – Percentage higher than the original quotation ... 86
Table 65: Business owners/managers – Business confidence ... 88
Table 66: Business owners/managers – Business confidence by financial performance YE 31 March 2022 ... 89
Table 67: Business owners/managers – Forward work by financial performance YE 31 March 2022 ... 90
Table 68: Business owners/managers – Business plans ... 91
Table 69: Business owners/managers – Business plans by financial performance YE 31 March 2022 ... 92
Table 70: Business owners/managers – Factors influencing future business plans ... 94
Table 71: Business owners/managers – Areas of help and advice by business plans ... 96
Table 72: Workers – Years working in the sector and in current job ... 99
Table 73: Workers – Years working in current job by ability level ... 100
Table 74: Workers – Reasons for working for current business by ability level ... 102
Table 75: Workers – Reasons for working for current business by years worked for current business ... 103
Table 76: Workers – Future expectations by experience level ... 108
Table 77: Workers – Future expectations by industry category ... 110
Table 78: Delayers - Build timeframes ... 112
Table 79: Delayers and Planners – Factors influencing build/renovation timelines ... 113
Table 80: Business owners/managers – Current worker numbers by level ... 115
Table 81: Business owners/managers – Changes in worker numbers compared with 12 months ago by business plans ... 116
Table 82: Business owners/managers – Extent to which more staff are required at each experience level by business plans ... 117

Table 83: Business owners/managers – Types of staff required by business plans 118
Table 84: Business owners/managers – Types of staff required by industry category ... 119
Table 85: Business owners/managers – Types of staff having difficulties recruiting by business plans 121
Table 86: Business owners/managers – Types of staff having difficulties recruiting by industry category 122
Table 87: Business owners/managers – Consumer enquiries about new trends by future business plans 127
Table 88: Business owners/managers – Customer enquiries about new trends by industry category 128
Table 89: Business owners/managers – Current capability about new trends 129
Table 90: Business owners/managers – Current capability about new trends by future business plans 130
Table 91: Business owners/managers – Current capability about new trends by industry category 131
Table 92: Workers – Interest in developing personal capability in relation to new trends 133
Table 93: Workers – Interest in developing personal capability in relation to new trends by experience level 134
Table 94: Workers – Interest in developing personal capability in relation to new trends by industry category 135
Table 95: Workers – Current capability in new trends 136
Table 96: Workers – Current capability in new trends by experience 137
Table 97: Workers – Current capability in new trends by industry category 138
Table 98: End-user – Features of new builds 139
Table 99: End-user – Features of major renovations 140
Table 100: End-user – Reasons for features of new builds and major renovations 141
Table 101: End-user – Features of minor renovations 142
Table 102: End-user – Reasons for features of minor renovations 143
Table 103: Industries in scope 145
Table 104: Enterprises by industry category 235
Table 105: Workers by industry category 236
Table 106: Respondent profile – Business owners 238
Table 107: Respondent profile – Workers 243
Table 108: Respondent profile – End-users 250

1.0 Executive summary

1.1 Purpose and objectives

The building and construction sector[1] is a fast-growing industry both in New Zealand and globally.

Climate change and new developments in construction materials, technology, and design approaches are changing the building landscape and regulatory environment. At the same time, there is an increased demand for new builds. More workers and those equipped with skills to work with these new innovations are required. Currently, it is unclear whether the industry is prepared for these changes.

In addition, the sector is still being impacted by the COVID-19 pandemic and particularly, the supply and high cost of materials and products. This, in turn, continues to place a strain on businesses~~,~~ not only in a financial sense, but also in terms of mental wellbeing. Complicating matters further is the current economic environment and the effect this is having on end-users' decision-making.

Therefore, the purpose of this research is to **annually** monitor the state of the building and construction sector to inform MBIE's thinking on how to support the sector and help develop industry resilience. It will provide building system leaders with information on the annual state and performance of the sector, as well as provide ongoing monitoring of the level of sector maturity.

The monitor focuses on the experiences and opinions of **three** 'actor' groups:

1. **Business owners/managers** (those who own a business in the building and construction sector or are a senior manager, including those who are self-employed).
2. **Workers** (those who have a job in the sector, but are not a business owner, senior manager or self-employed).
3. **End-users**:
    a. 'Recent home builders and renovators' - who had commenced or completed a new build or renovation in the last 12 months.
    b. 'Delayers' - who have delayed a new build or renovation in the last 12 months.
    c. 'Planners' who are planning to build or renovate in the next 12 months.

This Ais the **Technical Report** for the State of the Building and Construction Sector: Annual Monitor 2021-2022. The key findings are in the **Summary Report** for the State of the Building and Construction Sector: Annual Monitor 2021-2022.

[1] Refer to Appendix A for the industries in scope.

1.2 Method and limitations

Research design and completion

The monitor was completed as **three** streams of work:

1. **Research development** – preceded by a series of workshops with internal MBIE stakeholders, this stream focused on the development of survey questions for each of the three 'actor' groups (i.e., business owners/managers, workers and end-users) and concluded with a stage of cognitive testing to ensure the questionnaires were meaningful and would be understood by respondents.

   The testing was completed using Belson's double-back method and involved five respondents for each 'actor' group.

   Copies of the final survey questionnaires can be found in Appendix B.

   The following themes or areas of investigation were covered between the three questionnaires:

   a. **The last 12 months for the sector** (i.e., year ending 31 March 2022) – including business owners'/managers' opinions about their financial performance and workers' perceptions of how busy it had been; comparison with the 2019/20 (i.e., the year before the COVID-19 pandemic); and businesses' response to the operating environment.

   b. **The impact of the COVID-19 pandemic** on business owners/managers, workers and end-users – including changes and delays in building plans; preparedness for further disruption.

   c. **Non-compliance, contracting and consumer protection.**

   d. Opinions about **build quality and efficiency, trust and confidence** in the sector.

   e. **Future plans and expectations** – including the business pipeline and influencing factors.

   f. **Changes in staff numbers** – including future workforce requirements and recruitment issues.

   g. **Future building trends** – including the level of consumer enquiry as reported by business owners/managers; capability of businesses; capability of workers; and interest of workers in developing their personal capability in the trends.

2. **Sampling and data collection** – all surveys were completed **online**. While the initial plan was to also complete the interviews by telephone, the length of the questionnaires (taking an average of 20 minutes plus to complete) negated this. No interviews were completed by telephone.

   Different methods were used to source and recruit the sample for each 'actor' group:

   a. **Business owners/managers** in scope were sourced from either ACC (under a Memorandum of Understanding) or Dynata, a panel provider.

      Business owners/managers via ACC were initially pre-called (from our call centre) to identify them by name, record their personal contact details and obtain their consent to complete the business owner survey. They were subsequently emailed a personal link to the survey questionnaire. Of the total sample of n=1,029 business owners/managers, n=304 (or 30%) were sourced in this way.

      The remainder (n=725 or 70%) were sourced directly from Dynata, a panel provider.

   b. **Workers** in scope were also mainly sourced via Dynata.

      Attempts were also made to recruit workers via the business owners/managers who were interviewed (i.e., they were incentivized to forward a survey link to workers in their business), as well as MBIE's sector partners.

      However, these sources proved to be relatively unsuccessful. Of the total sample of n=784 workers interviewed, n=19 (or 2%) were sourced via the business owners/managers who were interviewed and n=48 (or 6%) were sourced from the sector partners. Most workers (n=717 or 92%) were sampled via Dynata.

   c. **End-users** in scope were recruited entirely by Dynata.

The target sample for each 'actor' group was set at n=1,000 and, therefore, while this was achieved for business owners/managers and end-users, this target was not achieved for workers. This could reflect the challenges and stresses faced by those working in the sector, and potentially the literacy skills required to complete the online survey.

The surveys were completed in two tranches or waves:

a. **Wave 1: 30 March – 1 May 2022**: Surveys completed with n=481 business owners/managers, n=327 workers, and n=501 end-users.

b. **Wave 2: 27 May – 20 June 2022**: Surveys completed with n=548 business owners/managers, n=457 workers, and n=500 end-users.

Consequently, the results presented in this report are based on a **combination** of the surveys completed during the two waves; that is, surveys with n=1,029 business owners/managers, n=784 workers, and n=1,001 end-users.

The participation rate (the percentage who were invited and completed the survey) for each of these three 'actor' groups is as follows:

a. Business owners/managers – 50%.

b. Workers – 28%.

c. End-users – 45%.

3. **Processing, analysis and reporting** – the difficulties experienced in interviewing the target sample of n=1,000 workers were also experienced, to a certain extent, with business owners/managers.

   These difficulties resulted in achieving samples for both 'actor' groups that were skewed. In the case of business owners/managers, the achieved sample is skewed towards employers (i.e., self-employed are under-represented) and in the case of workers, it is skewed towards workers in their mid-later years (i.e., younger workers are under-represented).

   In an attempt to adjust for these skews, we sourced data from Statistics New Zealand to weight the two samples. While parameters were available to weight the achieved business owners/managers sample by both industry category and business size, weighting parameters were not available to weight the architectural, engineering and technical services component of the achieved workers sample by age.

   As a result, the decision was made to only weight these samples by **industry category** (i.e., the number of enterprises in each industry category for business owners/managers and the number of employees in each industry category for workers). Please refer to Appendix C for the weighting parameters.

   No weighting parameters were available to weight the end-user sample and, therefore, this sample remains unweighted.

These weighting-related limitations mean that the samples representing the three 'actor' groups cannot be claimed to be completely representative of the groups they represent. This is important to bear in mind when considering the results of the survey.

End-user prioritisation

As shown in Table 1, some end-users commenced, completed and/or delayed their build or renovations in the last 12 months, and/or planned this work to commence in the next 12 months:

1. Overall, 16% of recent home builders and renovators **commenced or completed** building a new house, apartment, etc.; 20% commenced or completed major renovations; and 76% commenced or completed minor renovations.

2. Similarly, of delayers, 11% **delayed** the building of a new house, apartment, etc.; 33% delayed a major renovation; and 68% delayed a minor renovation.

3. Eleven percent of planners stated they are **planning** to build a new house, apartment, etc. in the next 12 months. Fifteen percent said they were planning to complete major renovations and 83% minor renovations.

Table 1: End-user building/renovating activity

Q2. Thinking about the last 12 months. Which of the following apply to you, if any?
Q3. And still thinking about the last 12 months, did you delay any of the following?
Q4. And in the next 12 months, are you planning to start any of the following?

Base =	End-users 1001 %	Recent home builders and renovators 449 %	Delayers 276 %	Planners 276 %
Building a new house/townhouse/apartment/unit	13	16	11	11
Major renovations	22	20	33	15
Minor renovations	76	76	68	83
Other works				
Landscaping/outdoor work	37	47	24	32
Interior/exterior painting and decorating	35	46	23	30
Other	0	1	0	0

Total may exceed 100% because of multiple responses.

In the interest of minimising respondent burden, end-users were required to complete only one section of their survey – either the section on new builds or renovations commenced or completed in the last 12 months; the section on delayed works; or the section on planned works.

For this section, respondents were initially prioritised in favour of those commencing or completing works in the last 12 months. If this did not apply to them, respondents who had delayed works were prioritised over those planning works in the next 12 months.

Within each of these three groups of end-users, respondents were then prioritised in favour of those involved in new builds, followed by major, and then minor renovations.

As a result, end-users completed the survey as follows:

Table 2: Prioritisation

Unweighted base =	End-users 1001 %	Recent home builders and renovators 449 %	Delayers 276 %	Planners 276 %
Building a new house/townhouse/apartment/unit	12	16	11	8
Major renovations	20	17	31	15
Minor renovations	68	67	58	78
Total	100	100	100	100

Total may not sum to 100% due to rounding.

Additional information about those surveyed can be found in Appendix D of this report, including a comprehensive profile of the respondents comprising each of the three ‘actor’ groups.

Accuracy

The maximum margin of error (at the 95% confidence levels) for results from each of the ‘actor’ groups is as follows:

1. Business owners/managers: +/- 3.4%.

2. Workers: +/- 4.0%.

3. End-users:

    a. Recent home builders and renovators who had commenced or completed building a new house, apartment, etc. in the last 12 months – +/- 4.6%.

    b. End-users who had delayed a build or renovation in the last 12 months - +/- 5.9%.

    c. End-users who were planning to commence a build or renovation in the next 12 months – +/- 5.9%.

Limitations

The main limitations impacting the statistical accuracy of the data in this report arise because:

1. The business owner/manager sample was weighted by industry category, but skewed towards employers.

2. The worker sample was weighted by industry category, but skewed towards workers aged 30 years and over.

3. The unavailability of statistical information to weight the end-user sample, which was skewed towards recent home builders and renovators who had commenced or completed building a new house, apartment etc., in the last 12 months.

2.0 Surveyed respondents

In this section of the report, we describe the key characteristics of the three 'actor' groups, based on the n=1,029 business owners/managers, n=784 workers and n=1,001 end-users who were surveyed for this year's monitor.

Key results

- Most **business owners/managers** identified themselves as male (66%) and a little under one-third identified themselves as female (31%). Most stated they were 30 years of age or more. One-quarter said they were 60 years of age or over (24%).

  Most business owners/managers operated businesses that were involved in residential building construction (29%), building installation (17%) or building completion (15%). Most were located in the Auckland region (36%). Most stated that they operated their businesses with between 2 and 9 workers (including themselves) (40%), or were self-employed (24%). Most stated that they had been in business for over 10 years (61%). In comparison, 7% said their business had been operating for less than 2 years.

  Reflecting the profile of respondents' businesses by size, most business owners/managers reported an annual turnover of up to $1 million (47%), although a sizeable percentage stated their turnover was between $1 and $5 million (20%).

- Most **workers** identified themselves as male (70%) and 28% as female. Seventy-six percent stated they were born in New Zealand. A little over two-thirds of workers identified themselves as New Zealand European (or Pākehā) (68%), 16% as Māori, and 13% as Asian. Four percent identified themselves as Pacific people.

  Seven percent of workers stated they were new to the sector, while another 15% said they had some experience, but still worked under supervision. In comparison, 42% stated they had extensive experience, worked independently and also could coach others.

- Most **end-users** identified themselves as current homeowners (93%). Only a small percentage stated they were either paying rent/board where they lived (4%) or living rent/board-free (1%).

  In most cases, these end-users had commenced or completed, delayed, or planned to commence building a standalone house (72%). For example, this was the case for 70% of recent home builders and renovators who had commenced or completed building in the last 12 months.

  In many cases, end-users had commenced or completed, delayed or were planning to commence building their very first dwelling (56%), 'off the plans' (60%) and many with a group builder (44%). However, only about one-third (35%) stated these were going to be dwellings that were going to be owner-occupied.

2.1 Business owners/managers

The results presented in this sub-section of the report are presented in two parts. Firstly, we describe the characteristics of business owners'/managers' businesses, and secondly, we describe the personal characteristics of the business owners/managers.

Business characteristics

Table 3 shows that most business owners/managers operated businesses that were involved in **residential building construction** (29%), **building installation** (17%) or **building completion** (15%).

Table 3: Businesses - Industry category

Q2. Which of the following best describes the industry this business mainly operates in?

	Business owners/managers
Base =	1029
	%
Residential building construction (e.g., house building)	29
Non-residential building construction	2
Heavy and civil engineering construction (e.g., road and bridge construction)	2
Construction services - Land development and site preparation services	6
Construction services - Building structural services (e.g., concreting and bricklaying)	5
Construction services - Building installation services (e.g., plumbing and electrical)	17
Construction services - Building completion services (e.g., plastering and painting)	15
Other building construction services (e.g., landscaping)	5
Scientific research services	1
Architectural, engineering and technical services	18
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Over one-third of business owners/managers stated that their business operated in the **Auckland region** (36%), and with smaller percentages in Canterbury (17%), Wellington (14%) and Waikato (13%) (Table 4 overleaf). Four percent stated their business operated across New Zealand.

Table 4: Businesses - Operating regions

Q4. In which part(s) of the country does the business mainly operate in?

	Business owners/managers
Base =	1029
	%
Auckland	36
Waikato	13
Wellington	14
Canterbury	17
Rest of North Island	33
Rest of South Island	18
All New Zealand	4

Total may exceed 100% because of multiple responses.
Data is weighted, base number is the original number of interviews completed.

Most business owners/managers stated that they operated their businesses with between **2 and 9 workers**, including themselves (40%), or were **self-employed** (24%) (Table 5).

Business owners/managers operating larger businesses were **more likely** to state that their business operated in the main centres. For example, 44% of business owners/managers in Auckland have businesses with 10 or more workers. This compares with 34% for business owners/managers operating businesses in the rest of the North Island, for example.

Table 5: Businesses - Business size

Q6/7. Worker numbers

	Business owners/managers
Base =	1029
	%
1	24
2 to 5	25
6 to 9	15
10 to 19	16
20 to 49	9
50 to 99	4
100+	5
Don't know	2
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Most business owners/managers stated they operated businesses that had been in operation for **over 10 years** (61%). In comparison, 7% said their business had been operating for less than 2 years (Table 6).

Business owners/managers with businesses that had been operating longer were **more likely** to have larger workforces. For example, 71% of those who had 20 or more workers stated their business had been operating for 10 years or more compared with 61% who had been operating for between 2 and 5 years.

Table 6: Businesses - Years in operation

Q3. About how many years has the business been in operation (in New Zealand)?

	Business owners/managers
Base =	1029
	%
Less than 1 year	3
1 to less than 2 years	4
2 to less than 6 years	18
6 to less than 10 years	13
10 years or more	61
Don't know	0
Would rather not say	1
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Reflecting the profile of respondents' businesses by size, most business owners/managers reported an annual turnover of **up to $1 million** (47%), although a sizeable percentage stated their turnover was between $1 and $5 million (20%) (Table 7 overleaf).

As expected, turnover varied significantly by business size. For example, 79% of self-employed and 67% of business owners/managers with between 2 and 5 workers stated their turnover was up to $1 million compared with just 7% of those with 20 or more workers. Fifty-eight percent of the latter reported a turnover of $5 million or more.

Table 7: Businesses - Turnover

Q37. What is the business's turnover/income in the most recent financial year?

Base =	Business owners/managers 1029 %
Less than $100,000	15
$100,000 to $500,000	21
$500,001 to $1,000,000	11
$1,000,001 to $5,000,000	20
$5,000,001 to $10,000,000	8
$10,000,001 to $20,000,000	6
$20,000,001 to $50,000,000	2
$50,000,001 or more	4
Don't know	4
Would rather not say	10
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Table 8 overleaf shows that most business owners/managers stated their business had some **industry/professional affiliations** (56%), although one-third categorically reported that they did not (34%).

Business owners/managers operating **smaller** businesses were **more likely** to state their business had **no** affiliations. For example, self-employed (53%) and businesses with between 2-5 workers (38%) were more likely to state they did not have any industry/professional affiliations, compared with 16% of businesses with 20 or more workers.

In comparison, business owners/managers operating businesses with 20 or more workers were **more likely** to report having affiliations, particularly with BCITO (25%), Engineering New Zealand (21%), New Zealand Certified Builders Association (18%) and Registered Master Builders Association (12%).

Table 8: Businesses - Industry/professional body affiliation

Q36. Which of the following do you/does this business belong to? Please say yes or no to the following.

Base =	Business owners/managers 1029 %
Do not belong to an industry or professional body	34
New Zealand Institute of Architects (NZIA)	7
Architectural Designers New Zealand (ADNZ)	6
Association of Consulting and Engineering (ACE)	5
Building and Construction Industry Training Organisation (BCITO)	15
Engineering New Zealand	9
New Zealand Certified Builders Association (NZCB)	11
New Zealand Construction Industry Council (NZCIC)	4
New Zealand Green Building Council (NZGBC)	4
Registered Master Builders Association (RMBA)	9
Other	17
Don't know	6
Would rather not say	4

Total may exceed 100% because of multiple responses.
Data is weighted, base number is the original number of interviews completed.

Business owners'/managers' personal characteristics

Most business owners/managers responding to the survey identified themselves as **male** (66%). A little under one-third identified themselves as female (31%).

This did not vary by industry category, operating location or years in operation, but there were differences by business size and turnover, particularly for the self-employed. For example, business owners/managers who stated they were self-employed were **more likely** to identify themselves as male (76%), as were those with a turnover of less than $100,000 per annum (73%).

Table 9 shows that most business owners/managers stated they were **30 years of age or more** and that this was spread reasonably evenly across the mid-later year age bands. One-quarter said they were 60 years of age or over (24%).

The age of business owners/managers varied by industry category, years in operation, business size and turnover. For example, business owners/managers who were 60 years and over were **more likely** to be involved in architectural, engineering and tech services work (28%); had a turnover of less than $100,000 (36%); and operated their business for 10 years or more (33%).

Table 9: Business owners/managers - Age

Q42. Which of the following age groups do you come into?

	Business owners/managers
Base =	1029
	%
Up to and including 20 years of age	0
21-29 years	5
30-39 years	20
40-49 years	23
50-59 years	28
60-69 years	18
70 and over	6
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Eighty percent of business owners/managers identified themselves as **New Zealand European** (or Pākehā), 10% as Māori and 9% as Asian (Table 10). This varied little by industry category, years in operation, business size and turnover, but there were differences by operating location. For example, 18% of business owners/managers whose business operated in the Auckland region identified as Asian.

Table 10: Business owners/managers - Ethnicity

Q38. I am going to read out a list of ethnic groups. Can you tell me which ethnic group or groups you belong to?

	Business owners/managers
Base =	1029
	%
New Zealand European (or Pākehā)	80
Māori	10
Pacific	3
Asian	9
Middle East/Latin American/African	1
Other	4
Would rather not say	4

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Given that 10% of business owners/managers identified themselves as Māori, it is interesting to note that 6% identified their business as a Māori-centred business (Table 11).

Table 11: Business owners/managers - Business ethnic identification

Q5. Based on its ownership, philosophy and/or management practices, does this business consider itself to be...?

	Business owners/managers
Base =	1029
	%
A Māori business	6
A Pasifika business	3
Neither	83
Don't know	3
Would rather not say	4
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Reflecting the ethnicity results, 77% of business owners/managers stated they were **born in New Zealand** and 65% had lived **all their life in New Zealand**. Almost all (97%) described themselves as a **New Zealand citizen** or New Zealand permanent citizen.

Additional, more detailed demographic information may be found in Appendix D.

2.2 Workers

Most workers completing the survey identified themselves as **male** (70%) and 28% as female. Seventy-six percent stated they were **born in New Zealand** and 58% had lived **all their life in New Zealand**. Ninety-four percent stated they were a **New Zealand citizen** or New Zealand permanent citizen.

A little over two-thirds of workers identified themselves as **New Zealand European** (or Pākehā) (68%), 16% as Māori and 13% as Asian (Table 12). Four percent identified themselves as a Pacific person. Eighty-eight percent of workers identified English as their ‘first’ language.

Table 12: Workers - Ethnicity

Q31#. Ethnicity

	Workers
Base =	784
	%
New Zealand European (or Pākehā)	68
Māori	16
Pacific	4
Asian	13
Middle East/Latin American/African	2
Other	7
Would rather not say	2

Total may exceed 100% because of multiple responses.
Data is weighted, base number is the original number of interviews completed.

Table 13 overleaf shows that workers worked in the following industries: **building installation** (19%), the **architectural, engineering and technical services** field (19%), **residential building construction** (16%) and **heavy and civil engineering** (16%).

Table 13: Workers - Industry category

Q2. Which one of the following best describes the industry the business you work for mainly operates in?

	Workers
Base =	784
	%
Residential building construction (e.g., house building)	16
Non-residential building construction	5
Heavy and civil engineering construction (e.g., road and bridge construction)	16
Construction services - Land development and site preparation services	5
Construction services - Building structural services (e.g., concreting and bricklaying)	5
Construction services - Building installation services (e.g., plumbing and electrical)	19
Construction services - Building completion services (e.g., plastering and painting)	9
Other building construction services (e.g., landscaping)	4
Scientific research services	4
Architectural, engineering and technical services	19
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Seven percent of workers stated they were **new** to the sector, while another 15% said they had **some experience, but still worked under supervision** (Table 14). In comparison, 42% stated they had **extensive experience, worked independently and could coach others**. The sample of workers was skewed towards those aged in their mid-later years.

As one would expect, these results differed by age, with over one-half of those aged 20-29 (54%) stating they were either new to the sector or had some experience, but still worked under supervision. In comparison, 59% of workers aged 50-59 and 60% of those aged 60 years or over said they had extensive experience, worked independently and could coach others.

Table 14: Workers – Experience

Q1. Which one of the following best describes you?

	Workers
Base =	784
	%
I am new to the building and construction sector (e.g., I am an apprentice, new graduate)	7
I have some work experience, but still work under supervision	15
I have enough work experience to work independently	31
I have extensive work experience, work independently and can coach others	42
Other	3
None of the above	3
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

As stated above, the results for experience correlate with the results for the age of workers. Table 15 shows that almost one-third of workers stated they were 50 years of age or over (30%), which was twice that of the percentage who said they were aged 29 or younger (16%).

There were also a number of significant differences by gender and ethnicity. For example, female workers had a younger age profile than male workers (23% of female workers were aged up to and including 29 years compared with 12% of male workers). Similarly, Māori and Asian workers had a younger age profile than New Zealand European/Pākehā workers (e.g., 21% of Asian workers were aged up to and including 29 years compared with 15% of New Zealand European/Pākehā workers).

Table 15: Workers – Age

Q38. Which of the following age groups do you come into?

	Workers
Base =	784
	%
Up to and including 20 years of age	1
21-29 years	15
30-39 years	31
40-49 years	24
50-59 years	17
60-69 years	11
70 and over	2
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Also reflecting workers' status and age was the number of years they had spent working in the sector. Table 16 shows that that 14% of workers stated they had **spent less than 2 years** working in the sector. In comparison, 47% stated they had **spent 10 years or more**.

Table 16: Workers – Years in sector

Q10. And about how long have you worked in the building and construction sector, in total?

	Workers
Base =	784
	%
Less than 1 year	7
1 to less than 2 years	7
2 to less than 6 years	21
6 to less than 10 years	16
10 years or more	47
Don't know	1
Would rather not say	1
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Table 17 shows workers varied in terms of their highest educational qualification, with most having a **trade qualification** (31%), a **tertiary certificate/diploma** (20%) or **bachelor's degree** (15%). Thirteen percent stated their highest educational qualification was a **secondary school qualification.** Eighty-six percent said they obtained their highest educational qualification in New Zealand.

To a certain extent, these results also varied by age. For example, 29% of workers aged up to and including 29 years stated they had a secondary school qualification or trade certificate as their highest educational qualification compared with 15% of workers aged 30-39. On the other hand, 22% of workers aged 30-39 said they had a bachelor's degree as their highest educational qualification, compared with 16% of workers aged up to and including 29 years.

However, as one would expect, the most marked differences were in terms of personal income. For example, one-third of workers earning less than $50,000 stated their highest educational qualification was a secondary school qualification compared with 13% of those earning between $50,000 and $100,000. These workers were more likely to have a trade qualification (32% compared with 16% of those earning less than $50,000).

Table 17: Workers – Highest educational qualification

Q29. Which one of the following is your highest educational status?

	Workers
Base =	784
	%
Secondary/high school qualification	13
Certificate in building and construction industry training	7
Trade qualification (e.g., Civil Trades Certificate)	31
Tertiary certificate/diploma (lower than Bachelor's degree)	20
Bachelor's degree (or higher)	15
Post-graduate certificate or higher (including Honours, Post-graduate Diploma, Masters or PhD)	9
Other	1
No formal qualifications	3
Would rather not say	2
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Most frequently, workers stated they earned **between $70,001 and $100,000 per annum** (35%), although 39% said they earned less than this (Table 18 overleaf). Most also stated they were paid by the hour (52%), while 37% said they were paid a salary.

Income and payment method are correlated. For example, workers earning $100,001 and $150,000 per annum were more likely to be paid a salary (59%) compared with an hourly wage (29%). On the other hand, workers earning less than $50,000 were more likely to be paid an hourly wage (81%) compared with a salary (10%).

There were also differences by industry category. For example, roughly equal percentages of workers involved in the architectural, engineering and technical services field stated they were paid by salary (48%) or by the hour (40%). In comparison, fewer workers involved in residential building construction stated they were paid a salary (27%), while more than double were paid by the hour (59%).

Table 18: Workers – Personal income

Q28. Which one of the following best describes your annual income from your current job, before tax?

	Workers
Base =	784
	%
Up to and including $20,000	1
$20,001 - $50,000	11
$50,001 - $70,000	27
$70,001 - $100,000	35
$100,001 - $150,000	15
$150,001 or more	3
Would rather not say	9
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Additional, more detailed demographic information may be found in Appendix D.

2.3 End-users

End-users were interviewed on the basis that they had commenced or completed a build or renovation in the last 12 months (n=449), had delayed a build or renovation in the last 12 months (n=276), or were planning a build or renovation in the next 12 months (n=276).

Overall, most of all three groups identified themselves as **current homeowners** (93% of the total sample of n=1,001 end-users). Only a small percentage stated they were either **paying rent/board** where they lived (4%) or living rent/board-free (1%) (Table 19).

Sixteen percent said they also **own or part-own another residential property** (other than the one they lived in). Twice as many end-users who had commenced or completed building or renovating in the last 12 months stated this compared with those who were planning to build (20%) or renovate in the next 12 months (11%).

Table 19: End-users – Home ownership status

Q1 Which of the following best describes you?

Base =	End-users 1001 %
I own/part-own the place where I live	93
I own/part-own another residential property in New Zealand	16
I am a tenant/boarder where I currently live, paying rent/board	4
I do not own my current place of residence, and I do not pay either rent/board	1

Total may exceed 100% because of multiple responses.

Table 20 overleaf shows the nature of the building and renovation work undertaken, delayed or planned by the three groups making up the end-user sample.

For example, in the case of the recent home builders and renovators, 16% had commenced or completed building a **new house**, **townhouse, apartment or unit**; 20% had completed or commenced **major renovations** (i.e., structural changes, an extension, roof change, cladding change); and 76% had commenced or completed **minor renovations** (i.e., fixing faulty parts, bathroom upgrade, replacing carpets/flooring, rewiring, etc.).

In the case of the delayers, 11% had delayed building a new house in the last 12 months, 33% a major renovation and 68% a minor renovation.

On the other hand, 11% of planners were planning to build a new house in the next 12 months, 15% a major renovation and 83% a minor renovation.

Table 20: End-users – Building and renovating activity

Q2. Thinking about the last 12 months. Which of the following apply to you, if any?
Q3. And still thinking about the last 12 months, did you delay any of the following?
Q4. And in the next 12 months, are you planning to start any of the following?

	End-users	Recent home builders / renovators	Delayers	Planners
Base =	1001	449	276	276
	%	%	%	%
Building a new house/townhouse/apartment/unit	13	16	11	11
Major renovations	22	20	33	15
Minor renovations	76	76	68	83
Other works				
Landscaping/outdoor work	37	47	24	32
Interior/exterior painting and decorating	35	46	23	30
Other	0	1	0	0
Total	**	**	**	**

Total may exceed 100% because of multiple responses.

It is important to remember that, to reduce survey burden, we prioritised as many as possible end-users who had **commenced or completed a new build in the last 12 months, followed by a major renovation**. If this did not apply to them, we prioritised those who had delayed ahead of those who were planning to build or renovate.

The following tables are based on respondents completing, delaying or planning a new build. Care should be taken when interpreting the results because of the relatively small sub-sample sizes for each end-user group.

Table 21 overleaf shows that, in most cases, these end-users had commenced or completed, delayed or planned to commence building a **standalone house**. For example, this was the case for 70% of recent home builders and renovators who had commenced or completed building in the last 12 months.

Table 21: End-users – Type of new buildings being built

Q5. Which one of these best describes what you built/started building in the last 12 months?

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	131	71*	31**	29^
	%	%	%	%
It is a standalone house	72	70	71	76
It is a townhouse/flat	18	23	13	14
It is an apartment/unit	4	4	3	3
It is a retirement village unit	2	1	3	3
Other	4	1	10	3
Total	100	100	100	100

Total may not sum to 100% due to rounding.
*Sub-sample based on end-users who commenced/completed building a new house/townhouse/apartment/unit in the last 12 months.
**Sub-sample based on end-users who delayed building a new house/townhouse/apartment/unit in the last 12 months.
^Sub-sample based on end-users who are planning to commence building a new house/townhouse/apartment/unit in the next 12 months.

Table 22 shows that most builds ranged in size from **a relatively modest 71 square metres to a relatively large 200 square metres** (764%). However, in the case of delayers and planners, their builds tended to be much larger. However, care should be taken in interpreting these results because of the small sub-sample sizes.

Table 22: End-users – Size of new builds

Q8. About what size is the [description]? Please include any garaging.

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	131	71*	31**	29^
	%	%	%	%
Between 31-70 square metres	6	4	6	3
Between 71-100 square metres	15	24	10	7
Between 101-150 square metres	27	25	6	3
Between 151-200 square metres	24	27	26	34
Between 201-250 square metres	11	8	16	24
251 square metres or more	9	7	13	17
Don't know	5	4	13	10
Total	100	100	100	100

Total may not sum to 100% due to rounding.
*Sub-sample based on End-users who commenced/completed building a new house/townhouse/apartment/unit in the last 12 months.
**Sub-sample based on End-users who delayed building a new house/townhouse/apartment/unit in the last 12 months.
^Sub-sample based on End-users who are planning to commence building a new house/townhouse/apartment/unit in the next 12 months.

Table 23 shows the results relating to the characteristics of new builds. In many cases, end-users had commenced or completed, delayed or were planning to commence building their **very first dwelling** (56%) and many with a **group builder** (44%). However, only about one-third (35%) stated these were dwellings that were going to be owner-occupied.

Table 23: End-users – Characteristics of new builds

Q6 Which of the following apply to the […house/townhouse/apartment/unit] that you are building/had built?

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	131	71*	31**	29^
	%	%	%	%
This is the first [description] I have ever had built	56	62	45	55
It is (being) built by a group builder (e.g., G. J. Gardiner)	44	44	45	45
I/we have bought this as a 'land and house' package	21	20	19	28
I/we intend to live in the [description]	35	32	39	38
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on End-users who commenced/completed building a new house/townhouse/apartment/unit in the last 12 months.
**Sub-sample based on End-users who delayed building a new house/townhouse/apartment/unit in the last 12 months.
^Sub-sample based on End-users who are planning to commence building a new house/townhouse/apartment/unit in the next 12 months.

Table 24 shows that, in many cases, the new builds were being built or were going to be built **'off the plans'**. This was the case for 51% of recent home builders and renovators.

Table 24: End-users – Design characteristics of new builds

Q7. Are you/did you...

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	131	71*	31*	29*
	%	%	%	%
Building/build 'off the plans' with some flexibility to make changes	60	51	71	69
Building/build 'off the plans' with no flexibility	20	27	10	14
Building/build a [description] that you have designed with an architect/architectural designer to specifically meet your needs	19	23	19	10
Total	100	100	100	100

Total may not sum to 100% due to rounding.
*Sub-sample based on End-users who commenced/completed building a new house/townhouse/apartment/unit in the last 12 months.
**Sub-sample based on end-users who delayed building a new house/townhouse/apartment/unit in the last 12 months.
^Sub-sample based on end-users who are planning to commence building a new house/townhouse/apartment/unit in the next 12 months.

Table 25 describes the three end-user groups in terms of their age and showed that most building and renovating activity was being undertaken by consumers aged **35 years or more**. While there is relatively little difference between the age profiles of recent home builders and renovators compared with delayers, note the older age profile of planners. Thirty-five percent of planners stated they were 65 years and over, compared with about 25% of the two other groups.

Table 25: End-users – Age

Q74. To finish off, please answer the following questions about yourself. Which of the following age groups do you come under?

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	1001	449	276	276
	%	%	%	%
18-34	17	17	17	14
35-49	31	32	33	29
50-64	25	26	28	22
65 and over	27	25	23	35
Total	100	100	100	100

Total may not sum to 100% due to rounding.

Reflecting the results by age were the results for employment status (Table 26), with a significantly larger percentage of planners identifying themselves as **retired** compared with the other two groups.

Table 26: End-users – Employment status

Q80. Which one of the following best describes you at present?

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	1001	449	276	276
	%	%	%	%
I am an employer	5	5	6	3
I am self-employed	9	10	10	7
I am an employee, earning a wage or salary	51	51	50	52
I'm a full-time homemaker or renovator	6	6	8	6
I am a student	0	0	0	0
I'm unemployed	2	3	3	1
I'm retired	23	21	21	28
I receive a benefit or government support payments (also includes Superannuation and COVID Wage Subsidies)	2	2	3	2
Other	1	1	1	0
Total	100	100	100	100

Total may not sum to 100% due to rounding.

Table 27 shows that most end-users surveyed identified as **New Zealand European** (or Pākehā). This was particularly the case for planners (81% compared with 70% of recent home builders and renovators, for example). Note, the relatively low percentages for Pacific peoples in all three end-user groups.

Table 27: End-users – Ethnicity

Q76. Which ethnic group (or groups) do you belong to?

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	1001	449	276	276
	%	%	%	%
New Zealand European (or Pākehā)	74	70	73	81
Māori	9	10	11	6
Samoan	1	2	1	0
Cook Island Māori	1	0	0	1
Tongan	0	1	1	0
Niuean	0	0	0	0
Chinese	5	6	4	4
Indian	5	6	7	2
Other ethnic group	11	10	11	11
Would prefer not to say	1	1	1	1
Total	**	**	**	**

Total may exceed 100% because of multiple responses.

Table 28 shows some variation between the three end-user groups in terms of geographic location. Specifically, in comparison to the other two groups, a higher percentage of end-users who have commenced or completed a build or renovation in the last 12 months lived in **Auckland** (31%). Also, a higher percentage of planners lived in Canterbury (21%).

Table 28: End-users – Region

Q84. In which part of the country do you live in?

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	1001	449	276	276
	%	%	%	%
Auckland	27	31	25	22
Waikato	10	9	12	9
Wellington	11	13	9	12
Canterbury	18	16	17	21
Rest of North Island	23	29	38	33
Rest of South Island	10	12	10	11
Total	100	100	100	100

Total may not sum to 100% due to rounding.

Reflecting the results above are the results shown in Table 29, which show that in comparison to the other two groups, a higher percentage of end-users who had commenced or completed a build or renovation in the last 12 months lived in **large cities** (31%). Also, a higher percentage of planners lived in rural areas.

Table 29: End-users – Urbanicity

Q85. And do you live in a...?

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	1001	449	276	276
	%	%	%	%
Large city	59	64	53	57
Small town	29	29	32	28
Or rural area	11	7	16	14
Would prefer not to say	0	1	0	0
Total	100	100	100	100

Total may not sum to 100% due to rounding.

Additional, more detailed demographic information may be found in Appendix D.

3.0 The last 12 months (YE 31 March 2022)

Key results

- Most business owners/managers described their financial performance for YE 31 March 2021 as neither positive nor negative (63%); 20% described it as positive and 14% as negative.

- Compared with the YE 31 March 2020 (the year before the COVID-19 pandemic started), business owners/managers rated their financial performance in the current year as either the ‘same’ (33%) or ‘worse’ (40%).

- Business owners/managers who stated their business had a positive financial performance most frequently attributed this to the fact that their customers wanted more work completed than they had originally projected. In addition, they said they had a level of profitability that was higher than expected, completed their work more efficiently, and/or attributed the performance to the fact that they have skilled staff.

  In comparison, business owners/managers who stated their business had a negative financial performance most frequently attributed this to the fact that their costs were higher and because of material shortages and delays. They also mentioned that their customers cancelled or delayed planned work and their margins were lower.

- Business owners/managers whose business had a positive financial performance responded differently to the operating conditions compared with those whose business had a negative performance. For example, the former group were more likely to state they had invested in new equipment and technology, offered pay rises to staff and hired new staff.

  In comparison, business owners/managers whose business’s financial performance had been negative were more likely to state they had asked their workers to take accrued holiday leave, work part-time, as well as make staff redundant.

- Most end-users (41%) who stated they had completely delayed their builds or renovations in the last 12 months said they had done so at the initial concept stage. However, others had delayed their plans at much later stages, including the point at which they were seeking quotes from builders (22%) or even finalising a contract (4%).

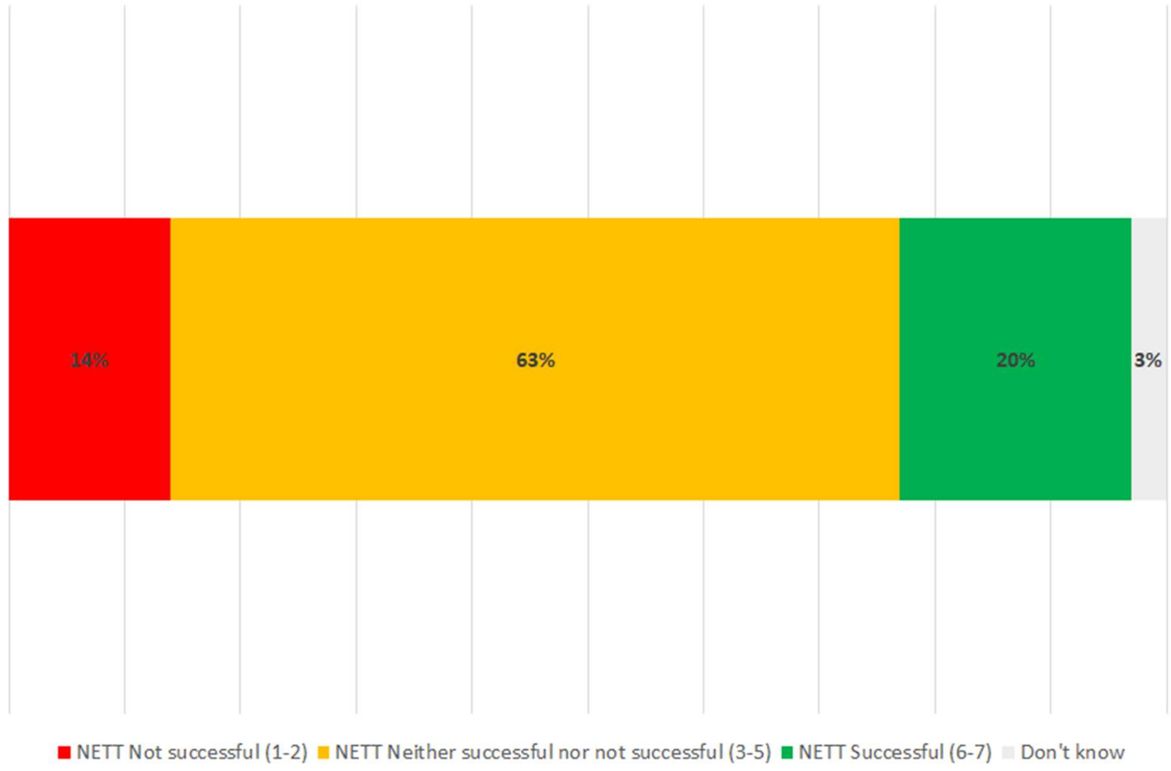
- In addition to delaying their builds and renovations, many end-users made changes to their builds and renovations, frequently in response to material/product delays (e.g., 34% of end-users who had commenced or completed building in the last 12 months). Typically, these changes were to manage costs and cost increases, and involved using lower priced products and fittings and/or deleting parts of the build/renovation.

3.1 Financial performance as reported by business owners/managers

Business owners/managers were asked to describe their business's financial performance in the last 12 months (YE 31 March 2022).

Figure 1 shows that 20% of business owners/managers described their business's financial performance **positively** by giving it a rating of 6 or 7 on the 7-point scale. On the other hand, 14% rated their business's performance **negatively** with a 1 or 2. Therefore, most business owners/managers rated their business's performance as **neither positive nor negative** with a 3-5 (63%).

Figure 1: Business owners/managers – Opinions about financial performance last 12 months (n=1,029)



Q10. Overall, to what extent would you say this business had a financially successful year?

These results differed significantly by business size, turnover and future business plans (Table 30). For example:

- Over one-third (35%) of business owners/managers representing larger businesses with 20 or more workers said their business had a financially successful year compared with self-employed (12%) and those with between 2-5 workers (15%).

- Almost one-third of those whose business had a turnover of over $1 million (30%) said they had a financially positive year compared with those whose business had a turnover of up to $100,000 (3%), and whose business had a turnover of between $100,000 and $500,000 (18%).

- Business owners/managers operating businesses that planned to grow were also **more likely** to state that their business had a financially positive year (28%), compared with 19% who planned to keep their business about the same size as it was now (19%), and those who planned to become smaller or close down (13%).

Table 30: Business owners/managers – Opinions about financial performance last 12 months

*Q10. Overall, to what extent would you say this business had a **financially** successful year?*

	Business owners/ managers	Larger businesses	Businesses with $1ml+ turnover	Businesses planning to grow
Base =	1,029	201	413	314
	%	%	%	%
1 - Not at all successful	7	4	4	5
2	6	0	4	5
3	14	8	12	12
4	23	22	22	21
5	26	29	27	25
6	14	23	20	17
7 - Extremely successful	6	12	10	11
Don't know	2	2	1	2
Would rather not say	1	0	0	2
Total	100	100	100	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Of note is that fact that there were **no** statistically significant differences by industry category or operating region.

Given that over three-quarters of business owners/managers rated their business' financial performance neutrally (63%) or negatively (14%) in YE 31 March 2022, it was not surprising that 33% said their financial performance that year was either the **'same'** or **'worse'** (40%) compared with the YE 31 March 2020 (the year before the COVID-19 pandemic started) (Table 31).

However, off-setting this was the fact that 23% stated it was 'better'.

Table 31: Business owners/managers – Financial performance compared with pre-COVID-19 pandemic year (n=945)

Q14. Still thinking about this business's financial performance this year. How does this compare with its performance in the 12 months before the COVID-19 pandemic started with the lockdown at the end of March 2020 (i.e., the year ending 31 March 2020)?

Base =	Business owners/ managers 945* %
Worse	40
About the same	33
Better	23
Don't know	3
Would rather not say	1
Total	100

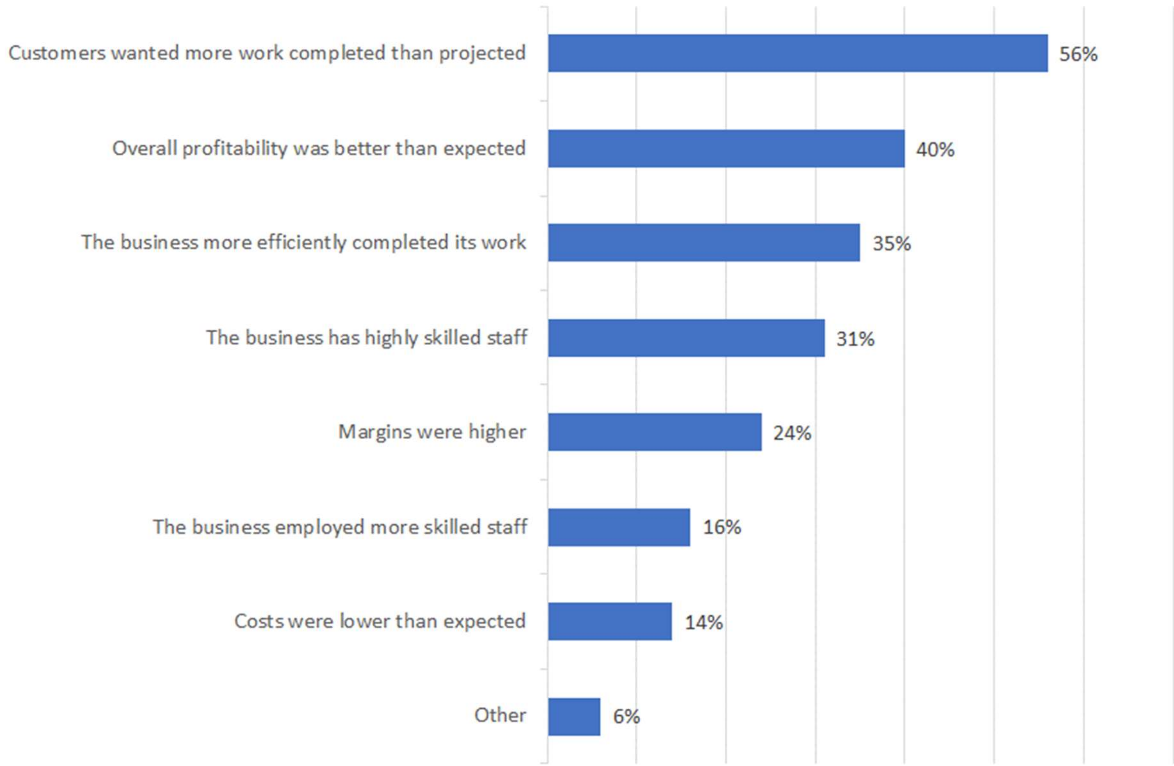
Total may not sum to 100% due to rounding.
*Sub-sample based on those business owners/managers operating for more than one year.
Data is weighted, base number is the original number of interviews completed.

3.2 Reasons for financial performance

Business owners/managers who stated their business had a positive financial year (20%) and those who said their business had a negative financial year (14%) were asked to provide an explanation.

Figure 2 shows that business owners/managers who stated their business had a **positive** financial performance most frequently attributed this to the fact that their *customers wanted more work completed* than they had originally projected (56%). In addition, they had a *level of profitability that was higher than expected* (40%), completed their work *more efficiently* (35%) and/or attributed the performance to the fact that they had *highly skilled staff* (31%).

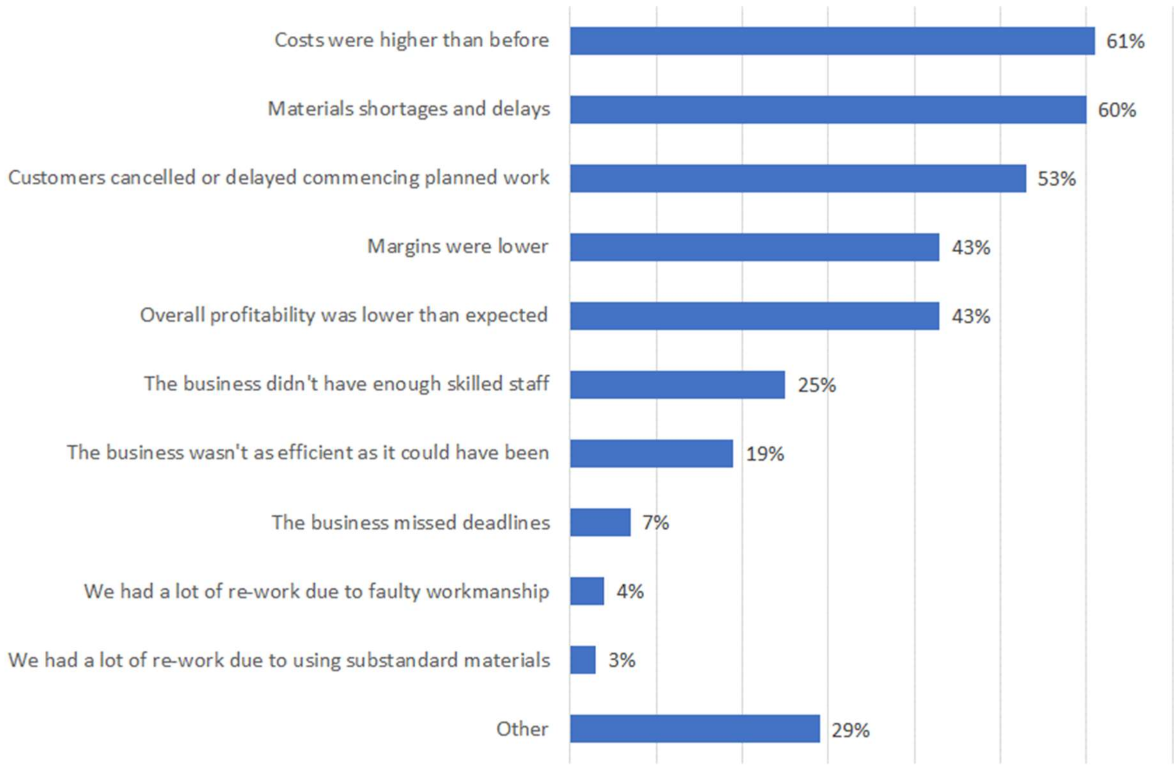
Figure 2: Business owners/managers – Reasons for positive financial performance (n=212)



Q13. What are the main reasons for this (having a successful financial year)?

In comparison, Figure 3 shows that business owners/managers who stated their business had a **negative** financial performance most frequently attributed this to the fact that their *costs were higher* (61%), *materials shortages and delays* (60%) and *customers cancelled or delayed planned work* (53%). A significant percentage of these business owners/managers also said their performance had been poor because their *margins were lower* (43%) and consequently, their *overall profitability was lower* (43%).

Figure 3: Business owners/managers – Reasons for negative financial performance (n=147)



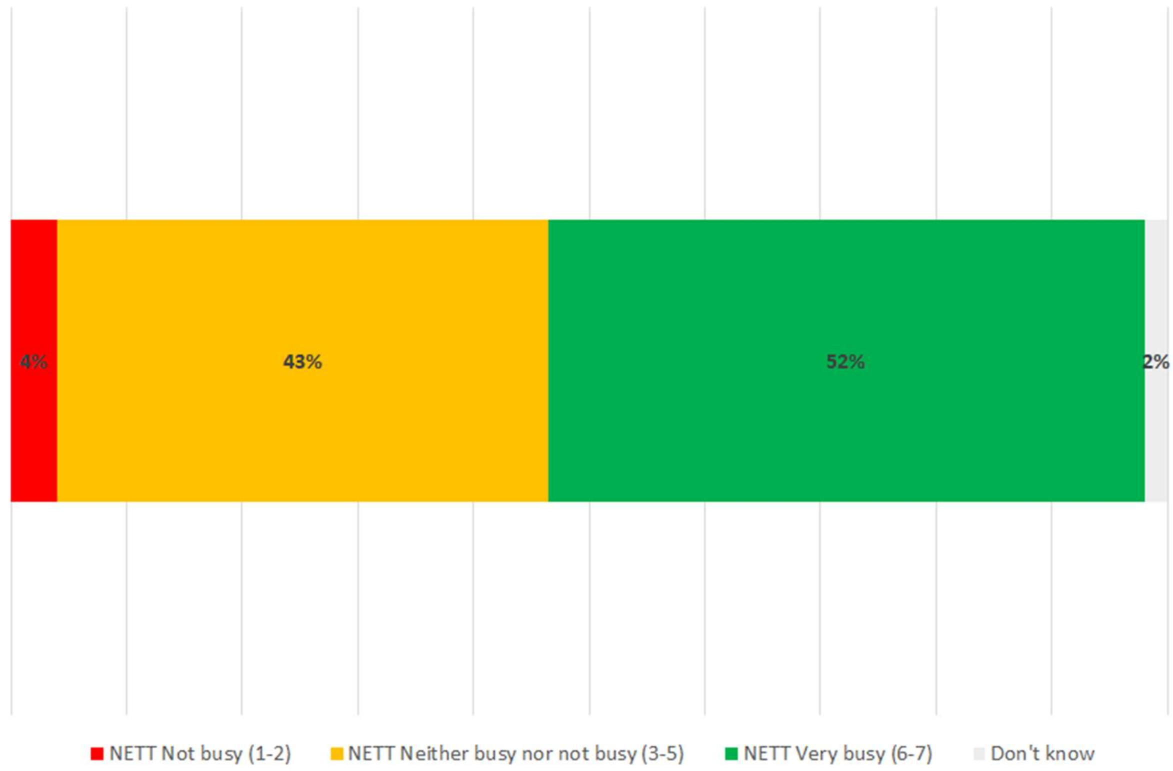
Q13. What are the main reasons for this (having an unsuccessful financial year)?

3.3 Business performance as reported by workers

Workers were also asked to comment on their business's performance, from the perspective of how busy their employer appeared to be in the last 12 months (YE 31 March 2022).

To the extent that they were able to judge this, 52% stated that their employer was *extremely busy*, by giving a rating of 6 or 7 on the 7-point scale (Figure 4). On the other hand, 4% said that their employer was not at all busy by giving a rating of 1 or 2. Forty-three percent responded more neutrally with a rating of 3 to 5.

Figure 4: Workers – Opinions about how busy their employer was in last 12 months (n=784)



Q11. Overall, to what extent would you say this business had a busy year?

There were few statistically significant differences, with the only exception being in terms of worker **experience** (Table 32 overleaf). In this regard, 57% of workers who identified themselves as being 'advanced/expert' (i.e., those with extensive work experience, could work independently and coach others) stated their employer had been very busy compared with 39% of those new to the sector.

Table 32: Workers – Opinions about how busy their employer was in last 12 months

*Q11. Overall, to what extent would you say the business had a **busy** year?*

	Workers	Advanced/ expert workers
Base =	784	320
	%	%
1 - Not at all busy	3	4
2	1	2
3	5	4
4	14	13
5	24	21
6	22	23
7 - Extremely busy	30	34
Don't know	1	0
Would rather not say	1	0
Total	100	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Table 33 shows how workers who rated the last 12 months as relatively busy compared this with the YE 31 March 2020 (i.e., the year before the COVID-19 pandemic started). While many workers stated the most recent year was the *same* in terms of how busy it was (36%), 52% rated it *busier*. A much smaller percentage (8%) rated it *less busy*.

Table 33: Workers – Busyness compared with pre-COVID-19 pandemic year

*Q12. How does this **compare** with how busy it was in the 12 months before the COVID-19 pandemic starting with the lockdown at the end of March 2020 (i.e., the year ending 31 March 2020)?*

	Workers
Base =	316*
	%
Not as busy	8
About the same	36
More busy	52
Don't know	4
Would rather not say	0
Total	100

Total may not sum to 100% due to rounding.
* Sub-sample based on those workers who considered their employer had a relatively busy year (rated 6-7 on the 7-point scale at Q11).
Data is weighted, base number is the original number of interviews completed.

3.4 Delaying building and renovation work

As noted, one of the main reasons given by business owners/managers who stated their business had a relatively negative year was that their customers had cancelled or delayed the commencement of planned work (46%). This was confirmed by end-users themselves.

Most end-users (41%) who stated they had **completely** delayed their builds or renovations in the last 12 months said they had done so at the *initial concept stage* (Table 34). However, others had delayed their plans at much later stages, including the point at which they were *seeking quotes from builders* (22%) or even *finalising a contract* (4%). Others had even done so *as the work commenced, mid-way* and in some cases even when it was *almost finished* (14% in total).

Table 34: End-users – Delayers – Stage at which delayed plans

Q39. At what stage were you in the build/renovation when you decided to delay your plans?

Base =	Delayers 276* %
At the initial concept stage, when I was thinking/planning what to build/renovate	41
Seeking an architect/architectural designer	3
At the design stage	5
Getting consent	5
Getting quotes	22
Finalising a contract	4
Work had just commenced	7
Work was midway through completion	3
Work had almost finished	4
Other	5
Total	100

Total may not sum to 100% due to rounding.
*Sub-sample based on those end-users who reported delaying their build/renovation.

Table 35 overleaf shows the reasons end-users, who had delayed their builds and renovations in the last 12 months, gave when asked why they had done this. The results are based on the percentage rating each reason with a 6 or 7 on the 7-point scale.

As can be seen, the most frequently mentioned reasons correspond with the reasons given by business owners/managers; that is, *ongoing cost increases* (50%), changes in *personal financial position* (42%) and *delays in the availability of preferred materials/products* (37%).

Table 35: End-users – Delayers – Reasons for delaying builds and renovations

Q40/40a. How much would you say each of these is important in explaining why you made this decision?

Base =	Delayers 276* %
Ongoing cost increases	50
Personal financial position changed	42
Delays in availability of preferred materials/products	37
COVID-19 disruptions (when they become more manageable at a national and/or international level)	31
Other aspects of personal position changed (e.g., health)	30
Builder not available	26
Preferred builder not available	23
Difficulties in obtaining consent	14
Architect/architectural designer/Engineer not available	12
Preferred architect/architectural designer/Engineer not available	11
Total	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on those end-users who reported delaying their build/renovation.

In addition to those end-users who delayed their builds and renovations in the last 12 months, 50% of recent home builders and renovators also stated they had **experienced** delays. Table 36 shows that they identified some of the same reasons for their delays (e.g., specified materials not available), although given that they were more advanced in their builds and renovations, they also frequently identified builder-related issues (e.g., builder not available, contracting issues) and consenting issues.

Table 36: End-users – Recent home builders & renovators – Reasons for delays

Q11. Which of these are a reason for these delays?

Base =	Recent home builders and renovators 226* %
Specified materials not available	38
Delays resulting from COVID-19 in general	35
Builder not available (to start and/or complete work)	28
Delays obtaining consent to start	18
Delays finalising a contract with builder	15
Issues with quality of work/needing to correct work	10
Delays with bank approving finance	9
Designer not available	9
Issues with getting final Code of Compliance Certificate	7
Delays due to mediation/legal action	3
Other	8
Total	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on those end-users who reported delaying their build/renovation.

3.5 Impacts of delays

End-users who stated they had delayed their builds or renovations, either temporarily or completely, were asked about the impact of these delays.

Table 37 is based on the extent to which these end-users rated each of several possible impacts with a 6 or 7 on the 7-point scale used to measure impact. It shows the impacts having the most impact were related to additional/unexpected costs, more time and effort than initially expected, as well as high levels of stress.

Table 37: End-users – Impact of delays

*Q12. Thinking about the delays. How much would you say each of these is an **impact** resulting from the delays? [Recent Home Builders & Renovators]*

Q47. Thinking about your decision to delay your plans. How much would you say each of these is an impact resulting from the delays? [Delayers]

Base =	End-users 502* %	Recent home builders and renovators 226* %	Delayers 276* %
Additional/unexpected costs	34	29	37
More time and effort from you than initially expected	26	28	25
High levels of stress	27	28	25
Strained relationships with the people/businesses involved in the process	20	24	16
Dissatisfaction with the process	18	20	16
Changes to building specifications	15	17	13
Cancellation of building plans	14	16	12
Total	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on those end-users who delayed their builds/renovations.

3.6 Making changes to plans

In addition to delaying their builds and renovations, many end-users stated they had made **changes** to their builds and renovations, frequently in response to the delays.

Approximately one-third of recent home builders and renovators stated they had made changes to their builds or renovations (34%). This was also the case with end-users who had completely delayed their plans in the last 12 months (32%) and those planning to build or renovate in the next 12 months (30%).

Table 38 shows the reasons for these changes. In all cases, *managing costs and cost increases* was most frequently mentioned. In addition, changes were also made because their preferred architects/architectural designers and/or builders were **not** available.

Table 38: End-users – Reasons for changes

Q19 Which of these are a reason for these changes? (Recent Home Builders & Renovators]
Q45 Which of these are a reason for these changes? [Delayers]
Q65 Which of these are a reason for these changes? [Planners]

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	323*	151*	89*	83*
	%	%	%	%
To manage costs/cost increases	16	43	48	43
To better meet personal needs	45	37	39	54
To manage delays in the availability of your preferred builder	18	23	30	10
To manage delays in the availability of your preferred architect/architectural designer	21	20	22	10
To manage delays in the availability of your preferred materials/products	18	19	21	12
To obtain consent/meet regulations	42	16	18	14
Other	3	5	1	1
None of the above	3	1	3	6
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on those end-users who made changes to what they had originally planned.

Given the reasons for the changes, Table 39 identifies what resulting changes were made. The changes most frequently mentioned related to using *lower priced products and fittings* and *deleting parts of the build/renovation*.

Table 39: End-users – Result of changes

Q20 Which of the following did you do as a result of these changes, if any? [Recent Home Builders & Renovators]
Q46 Which of the following did you do as a result of these changes, if any? [Delayers]
Q66 Which of the following did you do as a result of these changes, if any? [Planners]

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	311*	147*	86*	78*
	%	%	%	%
Decided to use lower priced materials and fittings	32	33	40	23
Decided to leave out parts of the build/renovation, possibly to do in the future	31	29	41	22
Decided to use materials and fittings that aren't as environmentally friendly	17	20	19	10
Decided to use materials and fittings that aren't as energy efficient	17	17	24	10
Decided to down-size generally	16	14	20	14
Decided to use recycled/used materials	11	10	9	15
Other	8	6	0	22
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on those end-users who made changes to what they had originally planned at any stage of the build or renovation.

3.7 Business owners'/managers' response to the operating conditions and their business performance

As noted earlier in Section 3.1 business owners/managers were asked to comment on whether their business's financial performance for YE 31 March 2022 was relatively positive or relatively negative.

Twenty percent rated their business's financial performance positively and 14% negatively, but most rated it as neither positive nor negative (63%). Furthermore, when they were asked to compare this with their business's performance for YE 31 March 2020 (the year before the COVID-19 pandemic started), many rated their financial performance as worse (40%), although many others rated it as the same (33%).

Against this background, business owners/managers were asked how their business had responded to their business's financial performance for YE 31 March 2022. Table 40 overleaf shows the response overall for those business owners/managers who stated their business's financial performance had been positive, compared with those who said their business's performance had been negative.

As can be seen, there were significant differences between these two groups. Business owners/managers who stated their business's performance had been positive were **more likely** to state they had *invested in new equipment and technology* (36%), *offered pay rises to staff* (48%) and *hired new staff* (45%).

On the other hand, business owners/managers who stated their business's financial performance had been negative appeared to **more likely** state they had asked their workers to *work part-time* (14%), *take unpaid leave* (11%), as well as *make staff redundant* (17%). These results are indicative because of the small sub-sample.

Table 40: Business owners/managers – Response to operating conditions and financial performance

Q13. As a result of its financial performance this year, which of the following - if any- did the business do?

	Business owners/ managers	Business owners/ managers Positive financial performance	Business owners/ managers Negative financial performance
Base =	1029	212^	147*
	%	%	%
Invested in new equipment/technology	30	36	13
Invested in a new/another business	5	7	1
Refinanced the business	6	2	14
Took on new partners/shareholders	4	6	1
Base^^ =	835	191	103
Offered pay rise to some staff	36	48	17
Hired new staff	30	45	13
Asked staff to take accrued holiday leave	16	14	18
Asked staff to work part-time	10	8	14
Made some staff redundant	9	4	17
Asked staff to take unpaid leave	6	6	11
Applied a pay cut to some staff	5	4	3
None of the above	29	25	43
Don't know	2	1	0
Would rather not say	2	0	2
Total	**	**	**

Total may exceed 100% because of multiple responses.
^ Sub-sample based on those business owners/managers who considered their financial performance was relatively positive (rated 6-7 on the 7-point scale at Q10).
* Sub-sample based on those business owners/managers who considered their financial performance was relatively negative (rated 1-2 on the 7-point scale at Q10).
^^Employers only.
Data is weighted, base number is the original number of interviews completed.

As noted earlier, many business owners/managers who were employers (i.e., were not self-employed) responded to their business's financial performance by asking their staff to take accrued leave, work part-time, etc. With this in mind, we have looked into business owners'/managers' employment practices comparing the current situation with the situation 12 months previously. Note that, for this purpose, workers have been classified into **four** categories:

1. **'Entry-level'**, defined as workers with no prior experience (e.g., apprentices, new graduates).
2. **'Intermediate'** level, defined as workers who have some work experience, but still work under supervision.
3. **'Experienced'** level, defined as workers who have sufficient work experience to work independently.
4. **'Advanced/expert'** level, defined as workers with extensive work experience, who work independently and are able to coach others.

Table 41 is based on this comparison for business owners/managers whose business' financial performance for YE 31 March 2022 was **positive**. This shows most stated their staff numbers at each experience level were the *same* compared with the situation 12 months ago, especially at the more experienced end of the continuum (e.g., 73% for the advanced/expert level compared with 59% for the 'entry' level).

However, of particular interest is the fact that, at all levels, at least 12% of these business owners/managers said they now had **more** staff compared with having less (e.g., 26% said they had more at the 'entry' level compared with 12% having less).

Table 41: Business owners/managers – Changes in worker numbers compared with 12 months ago by experience level (Businesses whose financial performance was positive)

*Q8. Compared to the situation 12 months ago, is the current number of paid staff that are in each group **less, more or the same**?*

	Entry level	Intermediate	Experienced	Advanced/expert
Base =	191	191	191	191
	%	%	%	%
More	26	21	19	12
The same	59	63	61	73
Less	12	13	18	10
Don't know	4	4	2	4
Total	100	100	100	100

Total may not sum to 100% due to rounding.
^ Sub-sample based on those business owners/managers who considered their financial performance was relatively positive (rated 6-7 on the 7-point scale at Q10).
Data is weighted, base number is the original number of interviews completed.

Table 42 presents the equivalent analysis for business owners/managers whose business's financial performance for YE 31 March 2022 was **negative**. This shows **fewer** of these stating they had more at each staff level and **more** said they had less.

For example, 20% stated they had fewer staff at the experienced level compared with 4% saying they had more. This contrasts with 19% of business owners/managers whose business's financial performance was positive having more experienced staff at this level and 18% having less (refer Table 41 above).

Table 42: Business owners/managers – Changes in worker numbers compared with 12 months ago by level (businesses whose financial performance was negative)

Q8. Compared to the situation 12 months ago, is the current number of paid staff that are in each group less, more or the same?

	Entry level	Intermediate	Experienced	Advanced/expert
Base =	103	103	103	103
	%	%	%	%
More	13	6	4	5
The same	62	70	71	75
Less	22	18	20	16
Don't know	3	6	5	4
Total	100	100	100	100

Total may not sum to 100% due to rounding.
^ Sub-sample based on those business owners/managers who considered their financial performance was relatively negative (rated 1-2 on the 7-point scale at Q10).
Data is weighted, base number is the original number of interviews completed.

4.0 COVID-19 pandemic impacts and readiness for further disruption

Building on the results presented in the previous section of this report, this section focuses on business owners'/managers' and workers' opinions about the impact of the COVID-19 pandemic on their business and workload. To the extent that the pandemic had also delayed or disrupted their plans to build or renovate, end-users' opinions were also examined.

Key results

- Both business owners/managers and workers most frequently identified the COVID-19 pandemic-related impacts as being the *disruptions caused by lockdowns* (e.g., 55% for business owners/managers and 41% for workers), the *unavailability of specified materials* (e.g., 53% for business owners/managers and 42% for workers) and the *poor on-time delivery of these materials* (e.g., 52% for business owners/managers and 42% for workers).

- Relatively low numbers of business owners/managers stated they were prepared should there be further COVID-19 like disruptions, with the best result recorded in relation to the *completion of existing work* (31%). This compares with only 18% in relation to the *management of increased project costs*.

4.1 Impact of the COVID-19 pandemic

Figure 5 overleaf is based on the extent to which business owners/managers and workers rated each of several possible COVID-19 pandemic related impacts, with a 1 or 2, on the 7-point scale used to measure impact. Overall, almost all the impacts were reported to a much greater extent by business owners/managers compared with workers.

Notwithstanding this, the impacts having the most impact for both ‘actor’ groups, were those relating to the *disruptions caused by lockdowns* (e.g., 55% for business owners/managers and 41% for workers), the *unavailability of specified materials* (e.g., 53% for business owners/managers and 42% for workers) and the *poor on-time delivery of these materials* (e.g., 52% for business owners/managers and 42% for workers).

To a slightly lesser, but still significant extent, were other impacts such as increased stress levels on business owners/managers and workers, the inability to forecast and plan and worker unavailability.

In the case of business owners/managers, the results did **not** differ significantly by industry category, operating region, business size, turnover or future business plans. In comparison, there were significant differences based on financial performance. For example, business owners/managers who stated their business had a relatively **negative** financial performance for YE 31 March 2022 were **more likely** to identify the following impacts:

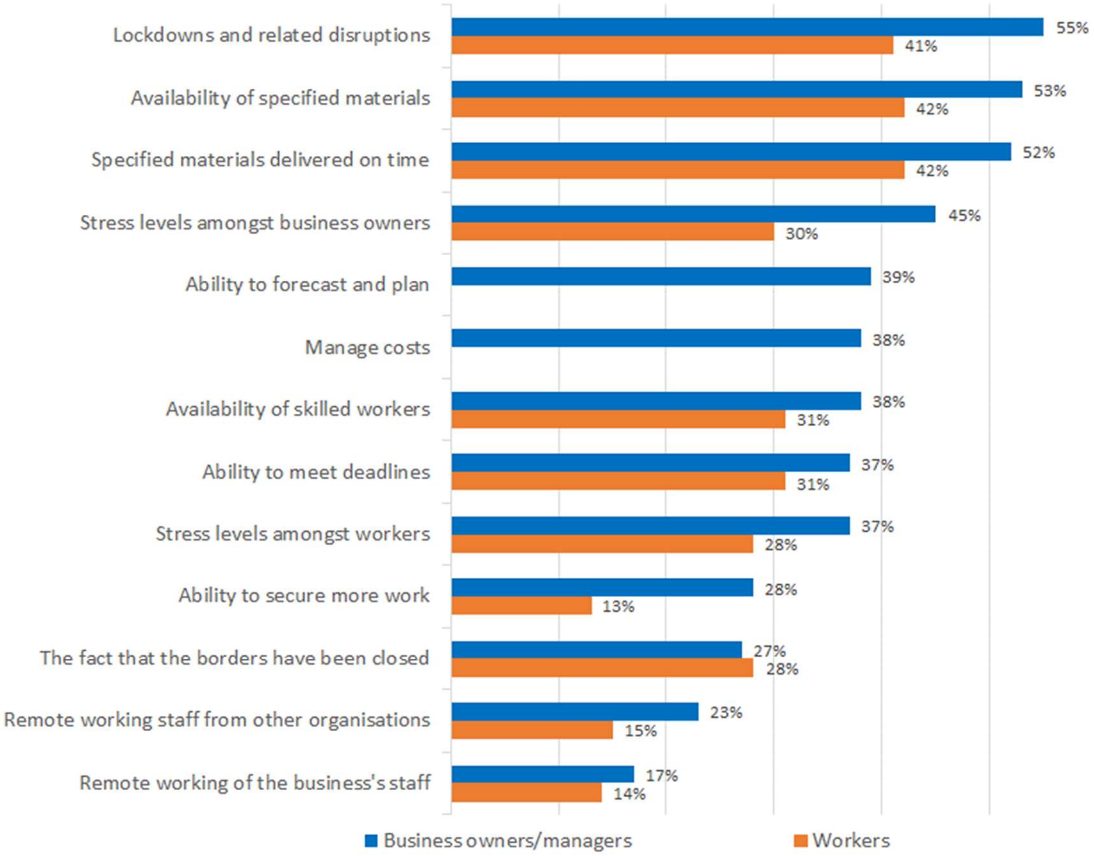
- The *disruptions caused by lockdowns* (74% compared with 44% of business owners/managers who said they had a relatively positive financial year).

- The *unavailability of specified materials* (65% compared with 41% of business owners/managers who said they had a relatively positive financial year).

- The *poor on-time delivery of specified materials* (59% compared with 39% of business owners/managers who said they had a relatively positive financial year).

As can be seen from the figure, workers also most frequently mentioned the same issues as having the most impact on their work.

Figure 5: Impact of the COVID-19 pandemic (Business owner/managers: n=1,029; Workers: n=784)



Q15/15a. Still thinking about the COVID-19 pandemic. How, and by how much would you say this business has been impacted by the pandemic in the last 12 months, in terms of each of the following? [Business owners]
Q14. And still thinking about the COVID-19 pandemic. In terms of the last 12 months, how and by how much would you say the business you currently work for has been impacted by the pandemic? [Workers]

Furthermore and as we have already noted, end-users also experienced various impacts resulting from the COVID-19 pandemic, which resulted in delays or changes to their building plans (refer to Sections 3.4 – 3.6). To reiterate:

- One-half (50%) of recent home builders and renovators stated they had experienced delays. Most frequently, the main reasons for these delays were *specified materials were not available* (38%), and *disruptions caused by COVID-19* (35%).

- One-half of end-users (50%) who had completely delayed their building or renovation plans in the last 12 months (delayers) did so because of *ongoing cost increases*, their *personal financial position changed* (42%) and *delays in the availability of preferred materials/products* (37%). Again, 31% specifically mentioned the *disruptions caused by the COVID-19 pandemic*.

Recent home builders and renovators were also directly asked about the impact of the COVID-19 pandemic on their builds and renovations. The impacts most frequently mentioned included budget escalations, increased costs and product substitutions (Table 43Table 43).

Some non-complying behaviour and practices were also observed, and these are reported in Section 5.

Compared with the results reported in MBIE's 2021 commissioned research: *The COVID-19 pandemic and its impact on building system actors*, some of this year's results are quite similar (e.g., in terms of budget over-runs, product substitution and tradespeople adding costs related to the COVID-19 pandemic), while others are very different (e.g., disputes around project delivery times and disputes around the quality of work) (Table 43).

Table 43: End-users – Impact of the COVID-19 pandemic

Q26 At any stage of the work, did you notice or did any of the following happen?

	Recent home builders and renovators 2022*	Recent builders and renovators 2021**
Base =	194	500
	%	%
Spending more than the initially estimated budget for your project	22	28
Tradespeople adding costs to your project, claiming that these were due to COVID-19	13	11
You had to agree to using substituted products as the specified products were not available	12	16
Disputes around project delivery dates	7	15
Disputes around the quality of the work	7	12
You were charged penalties/got discounts from tradespeople working on your project due to delays arising from COVID-19	3	4
Total	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on end-users whose build or renovation had at least commenced.
** Sub-sample based on Recent builders and renovators.
Data is weighted, base number is the original number of interviews completed.

4.2 Preparedness for further disruption

Business owners/managers and workers were asked how prepared they were, if there were to be further disruptions of the type that had been experienced in the last two years because of the COVID-19 pandemic.

Figure 6 overleaf is based on the extent to which business owners/managers rated each of several areas, on the 7-point scale used to measure preparedness. This shows that relatively low numbers of business owners/managers stated they were very prepared, with the best result recorded in relation to the *completion of existing work* (31%). This compares with only 18% in relation to the *management of increased project costs*.

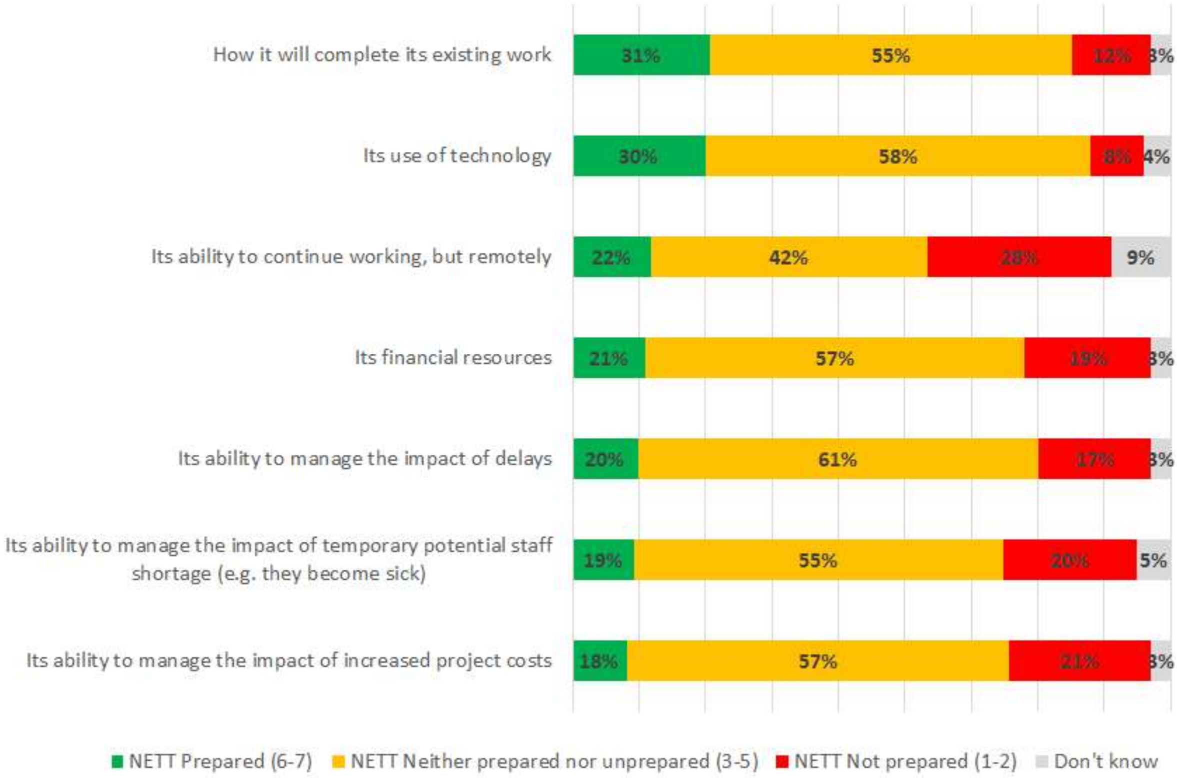
These results significantly differed by industry category, financial performance and future business plans. For example, in terms of the *completion of existing work*:

- Business owners/managers involved in residential building construction were **less likely** to state they were very prepared (24% compared with 34% for those involved in the architectural, engineering and technical services field).

- Business owners/managers who stated their business's financial performance for YE 31 March 2022 was negative were also **less likely** to state they were very prepared (22% compared with 49% for those who said their business's financial performance was positive).

- Business owners/managers who stated their business's future plans were based on becoming smaller/closing were also **less likely** to state they were very prepared (23% compared with 34% of those who said they wanted their business to grow).

Figure 6: Business owners/managers – Preparedness for further disruption (n=1,029)



Q19. If there was further disruption of the type we have been experiencing in the last two years because of the COVID-19 pandemic, how prepared would you say this business is in terms of each of the following?

Table 44 presents a similar analysis for workers, with the results again based on the extent to which they rated each area with a 6 or 7 on the 7-point scale used to measure preparedness. This shows that workers perceived themselves to be relatively more prepared than business owners/managers, particularly in relation to the *use of technology* (41%) and their *ability to work remotely* (41%).

The results significantly differed by industry category, educational level, income and experience, as well as gender, with many of these being inter-related and probably related to work type. For example, in terms of the *use of technology*:

- Workers involved in residential building construction were **less likely** to state they were very prepared (27% compared with 60% for those involved in the architectural, engineering and technical services field).
- Workers with secondary school qualifications as their highest educational qualification were **less likely** to state they were very prepared (33% compared with 52% for those with post-graduate qualifications).
- Workers earning less than $50,000 were **less likely** to state they were very prepared (33% compared with 55% for those earning $150,001 or more).
- Workers with 10 or more years' experience were **less likely** to state they were very prepared (36% compared with 42% for those with up to two years' experience, for example).
- Male workers were **less likely** to state they were very prepared (37% compared with 54% of female workers).

Table 44: Workers – Preparedness for further disruption

Q16. If there was further disruption of the type we have experienced in the last 2 years because of the COVID-19 pandemic, how prepared would you say you are in terms of each of the following?

	Workers
Base =	784
	%
Your use of technology to complete your work	41
Your ability to work remotely	41
Your ability to manage the impact of delays on your work	31
Your personal financial position	29
Total	**

Total may exceed 100% because of multiple responses.
Data is weighted, base number is the original number of interviews completed.

5.0 Compliance, consumer protection and contracting

It is acknowledged that some businesses may have engaged in behaviours and practices over the last 2 years that they may not normally have done, to continue operating and meet their obligations to customers. In this section of the report, we examine these behaviours and practices from the perspective of business owners/managers and workers.

In addition, we examine the extent to which end-users understand the legal protection available to them as consumers, as well as the extent to which they had formal written contracts in place for their builds and renovations.

Key results

- 79% was the overall non-compliance rate for business owners/managers.
- 82% was the overall non-compliance rate for workers.
- *Stockpiling products* and **not** ensuring that their *workers followed appropriate COVID-19 health and safety protocols* were the two most frequently identified non-complying behaviours identified by both business owners/managers and workers.
- Few end-users (15%) claimed to be *very familiar* with the legal protection available to consumers, but 44% stated they were satisfied with the legal protection available.
- Less than one-half (45%) of recent home builders and renovators stated they had a written contract with their builder (i.e., those who had commenced and completed a build or renovation in the last 12 months).

5.1 Compliance

Figure 7 for business owners/managers and Figure 8 for workers overleaf show the extent to which each had engaged in or experienced a range of compliance-related behaviours and practices in the last 12 months. Engagement/experience was measured on a 7-point scale, with 1='not at all' and 7='many times'. Note that the **definition** of 'non-compliance' we have adopted for this analysis is based on the percentage of business owners/managers and workers giving **a rating of 2-7 for at least one** of the behaviours and practices, indicating a degree of non-compliance.

With this in mind, the overall non-compliance rate for business owners/managers was 79%. Figure 7 overleaf shows over one-half admitted that their business had *stockpiled products* (52%) and had not ensured their *workers followed appropriate COVID-19 health and safety protocols* (51%). It is also interesting that 37% stated they had *'poached' skilled staff* from other businesses. This aspect is discussed further in a later section of this report (refer to Section 7.2.2).

The non-compliance rate significantly varied by business owners/managers, based on industry category, size, turnover and business plans. Specifically, significantly **higher** rates of were recorded for:

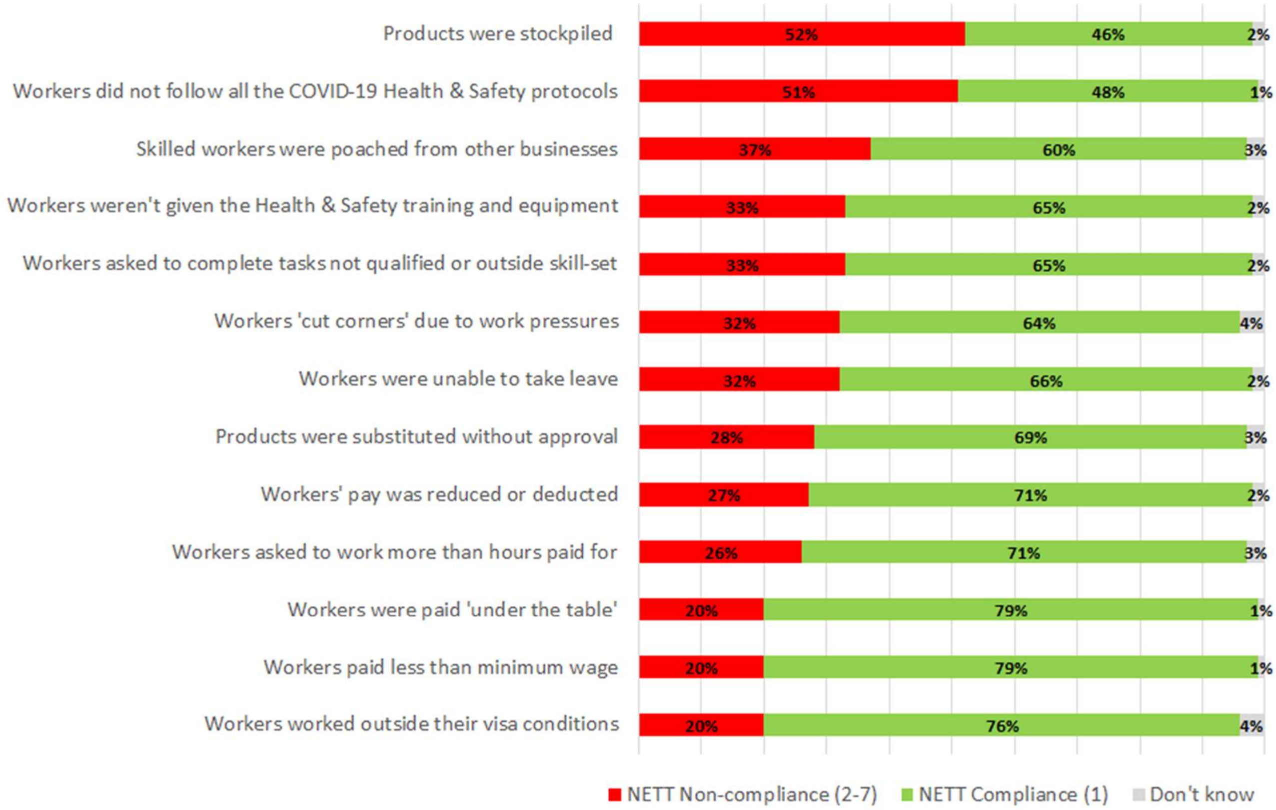
- Business owners/managers involved in residential building construction (83%) and building installation/completion (82%), compared with those involved in the architectural, engineering and technical services field (71%).

- Those with larger businesses with 20 or more staff (86%), compared with 69% for self-employed.

- Those with larger turnovers of $1 million or more (87%), compared with 71% for those business owners/managers whose business had a turnover of less than $100,000.

- Those with business plans which involved them becoming smaller or closing down (91%), compared with those business owners/managers who wanted their business to grow.

Figure 7: Business owners/managers – Complying behaviour and practices (n=1,029)

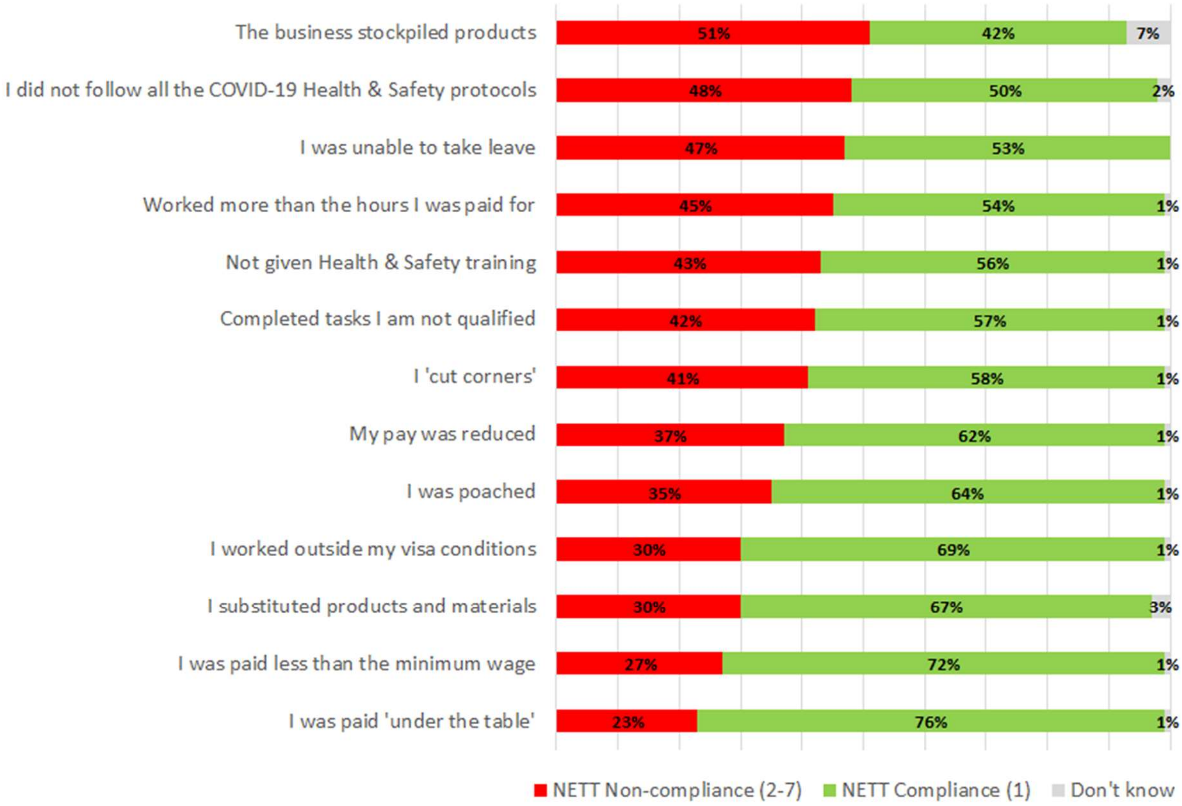


Q16. The building and construction sector has/is experiencing some challenging times. This is for a number of reasons, including the COVID-19 pandemic. This, in turn, has resulted in some work practices that would not normally be done. Based on your experience, how often – if at all – did the business do each of the following in the last 12 months. Remember this is a confidential survey.

Figure 8 show that workers had, at 82%, a higher overall non-compliance rate. Note that workers confirmed the behaviour of business owners/managers in terms of the *stockpiling of products* (51%), and the fact that *COVID-19 health and safety protocols* were not followed (48%). Although the *'poaching' of skilled staff* is lower down the list, it was still identified as a behaviour by 35% of workers.

Note the results for the other behaviours and practices that directly relate to workers (e.g., *not being able to take leave and breaks, working unpaid hours, not given appropriate health and safety training and equipment, being asked to complete tasks outside their skill-set, and 'cutting corners' due to work pressures*). Generally, workers were more likely to report these behaviours and practices than business owners/managers.

Figure 8: Workers – Complying behaviour and practices (n=784)



Q15. The building and construction sector has/is experiencing some challenging times. This is for a number of reasons, including the COVID-19 pandemic. This, in turn, has resulted in some work practices that would not normally be done. Based on your experience in the last 12 months, how often – if at all – did each of these happen to you? Remember this is a confidential survey.

Recent home builders and renovators were also asked if they had observed or had participated in these behaviour and practices, specifically in relation to pricing. Table 45 shows that the extent to which they reported they had was relatively low.

Table 45: End-users – Complying behaviour and practices

Q26 At any stage of the work, did you notice or did any of the following happen?

	Recent home builders and renovators
Base =	194*
	%
You were offered special "cash rates" for your job	6
You asked for special "cash rates" for your job	2
Total	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on End-users whose build or renovation had at least commenced.

5.1.1 Comparisons with 2021

Table 46 compares the extent to which these behaviours and practices were mentioned by business owners/managers this year with the situation in 2021 (as reported in MBIE's commissioned research: *The COVID-19 pandemic and its impact on building system actors*).

While there are some significant differences between 2022 and 2021, it is important to note that these might be a result of the fact that different response categories were used to establish the extent to which the behaviours and practices had occurred.

Table 46: Business owners/managers – Complying behaviour and practices – 2022 compared with 2021

Q16. The building and construction sector has/is experiencing some challenging times. This is for a number of reasons, including the COVID-19 pandemic. This, in turn, has resulted in some work practices that would not normally be done. Based on your own experience, how often – if at all – did the business do each of the following in the last 12 months. Remember this is a confidential survey.

	Business owners/ managers who did not comply 2022	Business owners/ managers who did not comply 2021
Base =	1029*	1118
	%	%
Products were stockpiled and/or orders were greater than needed	52	22
Workers did not follow all the COVID-19 health and safety protocols (e.g., physical distancing)	51	14
Skilled workers were poached from other businesses	37	NM
Workers weren't given the health and safety training and equipment they needed to do their work safely	33	8
Workers were asked to complete tasks they were not qualified to do or were outside their skill-set	33	12
Workers 'cut corners' due to work pressures	32	10
Workers were unable to take leave and/or meal/rest breaks	32	9
Products were substituted without approval (i.e., without council or client approval)	28	9
Workers' pay was reduced or deducted	27	9
Workers were asked to work more than the hours they are paid for	26	9
Workers were paid 'under the table'	20	6
Workers were paid less than the minimum wage	20	8
Workers worked outside their visa conditions	20	7
Total	**	**

Total may exceed 100% because of multiple responses.
*Sample sizes vary by behaviour and practice; non-applicables are excluded as are self-employed respondents in relation to worker statements.
NM = 'Not measured'.
Data is weighted, base number is the original number of interviews completed.

Table 47 is the equivalent table based on workers. While there are also some significant differences between 2022 and 2021, these differences may also be a result of the fact that different response categories were used to establish the extent to which the behaviours and practices had occurred.

Table 47: Workers – Complying behaviour and practices – 2022 compared with 2021

*Q15. The building and construction sector has/is experiencing some **challenging times**. This is for a number of reasons, including the COVID-19 pandemic. This, in turn, has resulted in some work practices that would **not** normally be done. Based on your own experience in the last 12 months, how often – if at all – did each of these happen to you? Remember this is a confidential survey.*

	Workers who observed behaviours that did not comply 2022	Workers who observed behaviours that did not comply 2021
Base =	784*	1038
	%	%
The business stockpiled products and materials and/or orders were placed greater than needed	51	13
I did not follow all the COVID-19 health and safety protocols (e.g., physical distancing)	48	18
I was unable to take leave and/or meal/rest breaks	47	16
I was asked to work more than the hours I was paid for	45	16
I was not given the health and safety training and equipment I needed to do my work safely	43	12
I was asked to complete tasks I am not qualified to do or are outside my skill-set	42	18
I 'cut corners' due to work pressures	41	14
My pay was reduced or deducted	37	12
I was poached from another business	35	NM
I worked outside my visa conditions	30	9
I substituted products and materials without approval (i.e., without council or client approval	30	11
I was paid less than the minimum wage	27	10
I was paid 'under the table'	23	9
Total	**	**

Total may exceed 100% because of multiple responses.
* Sample sizes vary by behaviour and practice; non-applicables are excluded.
Data is weighted, base number is the original number of interviews completed.

5.2 Consumer protection

End-users were asked about their familiarity and satisfaction with the legal protection that is available to people who are building or renovating.

Table 48 shows that few end-users (15%) claimed to be *very familiar* with the legal protection available to consumers, with most giving a *somewhat familiar* response (41%). In fact, one-third admitted that they were *not at all familiar* (34%).

Table 48: End-users – Familiarity with legal protection

Q31/52/70 How familiar would you say you are with the legal protection that is available to people who are building a new house or renovating?

	End-users
Base =	1001
	%
Not at all familiar	34
Somewhat familiar	41
Very familiar	15
Don't know	9
Would prefer not to say	1
Total	100

Total may not sum to 100% due to rounding.

Despite the low familiarity results outlined above, Table 49 shows that, in contrast, a relatively higher percentage of end-users stated they were satisfied (44%) with the legal protection available to consumers.

Table 49: End-users – Satisfaction with legal protection

Q32/53/71 Overall, how satisfied are you with the building protection you have as a consumer under the law?

	End-users
Base =	1001
	%
Very dissatisfied	2
Dissatisfied	4
Neither satisfied nor dissatisfied	24
Satisfied	33
Very satisfied	11
Don't know	26
Would prefer not to say	1
Total	100

Total may not sum to 100% due to rounding.

Table 50 examines the relationship between recent home builders and renovators' familiarity with the legal protection available to consumers with their satisfaction, using recent home builders and renovators as an example. This shows that end-users who stated they were very familiar were **more likely** to say they were also *very satisfied* (36% compared with 6% those who are *not at all familiar*). In fact, almost one-half of those who were *not at all familiar* stated they didn't know about their satisfaction.

Table 50: Recent home builders and renovators – Satisfaction with legal protection available to consumers by familiarity

Q31 How familiar would you say you are with the legal protection that is available to people who are building a new house or renovating? [Recent Home Builders & Renovators]

Q32 Overall, how satisfied are you with the building protection you have as a consumer under the law? [Recent Home Builders & Renovators]

	Recent home builders and renovators	Very familiar with legal protection	Somewhat familiar with legal protection	Not at all familiar with legal protection	Don't know
Base =	499	73	192	141	40
	%	%	%	%	%
Very dissatisfied with legal protection	1	0	2	1	0
Dissatisfied with legal protection	5	5	7	4	0
Neither satisfied nor dissatisfied	22	16	23	23	20
Satisfied with legal protection	36	42	49	19	22
Very satisfied with legal protection	14	36	13	6	8
Don't know	22	0	6	46	48
Would prefer not to say	1	0	0	1	2
Total	100	100	100	100	100

Total may not sum to 100% due to rounding.

5.3 Contracting

Given their stated familiarity and satisfaction with the legal protection that is available to consumers who are building or renovating, end-users were asked whether they had or were planning to have a written contract with their builder before starting their build or renovation.

Table 51 shows that **less than one-half** (45%) of recent home builders and renovators stated they had a written contract and that this was only 14% for delayers. However, the result for delayers is probably a function of the fact that most had delayed their builds or renovations at the initial concept stage (refer to Section 3.4).

Table 51: End-users – Written contracts

Q30 Did you/do you have a written contract with your builder? [Recent Home Builders & Renovators]
Q51 At the time you delayed the building of your new house/renovation, did you have a written contract with a builder? [Delayers]
Q69 Do you plan to have a written contract with your builder when you start building/your renovations? [Planners]

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	1001	499	276	276
	%	%	%	%
Yes	32	45	14	32
No	45	47	59	27
Builder not yet selected	14	NA	22	29
Don't know	6	5	3	11
Would prefer not to say	3	4	2	2
Total	100	100	100	100

Total may not sum to 100% due to rounding.

Focusing again on recent home builders and renovators, we have analysed their results by whether they were building new or renovating, and the value of their build or renovation:

- Eighty percent of recent home builders and renovators **who had built new** stated they had a written contract, compared with 53% of those who had commenced or completed a major renovation and 34% of those involved in a minor renovation.

- Eighty-three percent of recent home builders and renovators who had commenced or completed relatively expensive **works valued at $500,001+** stated they had a written contract compared with those with builds or renovations valued at between $50,001 to $500,000 (64%) and those with builds or renovations valued up to $50,000 (35%).

6.0 Sector opinions on building quality and efficiency, trust and confidence

This section of the report provides the results to questions which measured the three 'actor' groups' opinions of the building and construction sector and, in turn, their trust and confidence in the various 'parties' involved in the sector, from manufacturers and retailers through to tradespeople.

Related topics covered include end-users' satisfaction with their builds and renovations, the extent to which remedial work needed to be completed, as well as whether they were satisfied overall with their build or renovation.

Key results

- Most business owners/managers neither agreed nor disagreed with statements measuring their opinions about the building and construction sector. However, the two statements they most **agreed** with were: *There is too much reliance in the building and construction sector on imported materials* (44% agreement) and *there is too much reliance on imported skills* (27% agreement).

  Workers also most frequently agreed that the sector places too much reliance on imported materials (38% agreement).

- Both 'actor' groups also most frequently **disagreed** with the statement: *The sector is cost-efficient* (36% disagreement for business owners/managers and 24% for workers).

- Overall, business owners/managers stated they had a relatively low level of confidence in all sector 'players', with councils and local government, and overseas manufacturers, recording the lowest levels of confidence (both under 10%). This was also the case for workers and end-users.

- Approximately one-fifth of recent home builders and renovators (21%) stated they had experienced quality issues requiring remediation. This varied significantly by whether the end-user was building new (41%), completing a major renovation (32%) or a minor renovation (14%).

- Eighty-seven percent of recent home builders and renovators (whose new build or renovation was at least midway in terms of its completion or had been completed in the last 12 months) stated they were satisfied with the quality of their build or renovation.

6.1 General opinions about the building and construction sector

Business owners/managers and workers were asked to rate several statements describing the sector using a 7-point scale to measure agreement. Figure 9 and Figure 10 present the results for each 'actor' group respectively, based on the percentage disagreeing (giving a rating of 1 or 2) compared with the percentage agreeing (giving a rating of 6 or 7).

The statements are listed in descending order of agreement. Note that apart from the statements about imported products and skills, all statements are positively phrased.

6.1.1 Business owners'/managers' opinions

Figure 9 for business owners/managers shows that:

- Agreement was highest for the two negatively phrased statements about **imported materials and skills**. In fact, the statement recording the highest level of agreement was: *There is too much reliance in the building and construction sector on imported materials* (44% agreement).

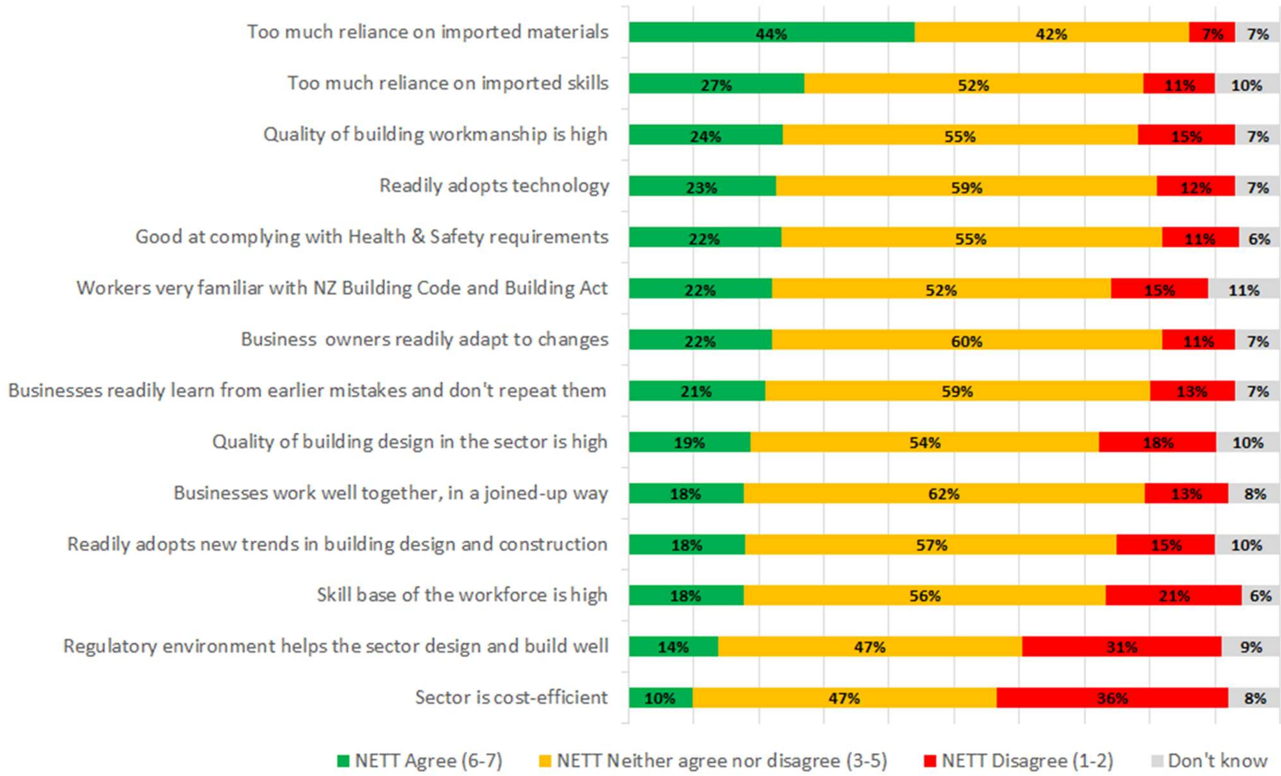
- All other statements, including all the positive ones, were agreed with by no more than about 20-25% of business owners/managers.

- In fact, most statements were given a rating of between 3 and 5 and, therefore, were neither agreed nor disagreed with. Although two recorded relatively significant levels of disagreement:

    - *The regulatory environment helps the sector design and build well* (31% disagreement compared with 14% agreement).

    - *The sector is cost-efficient* (36% disagreement compared with 10% agreement).

Figure 9: Business owners/managers – Opinions about the building and construction sector (n=1,029)



Q17/18. Based on your experience, how much do you agree or disagree with each of the following?

There were significant differences in terms of business owners'/managers' opinions, particularly based on their business's financial performance for YE 31 March 2022 and some by industry category and geographic location. For example, business owners/managers whose business had a relatively poor financial performance were **more likely to disagree** that:

- The building and construction sector *is cost-efficient* (56% disagreed compared with 31% for those whose business had a positive performance).

- *The regulatory environment helps the sector design and build well* (48% disagreed compared with 23% for those whose business had a positive performance).

- *Workers are very familiar with the NZ Building Code and Building Act* (32% disagreed compared with 15% for those whose business had a positive performance).

6.1.2 Workers' opinions

In comparison to the results for business owners/managers, Figure 10 shows workers had a slightly more positive view of the sector and particularly regarding those statements that relate to workers:

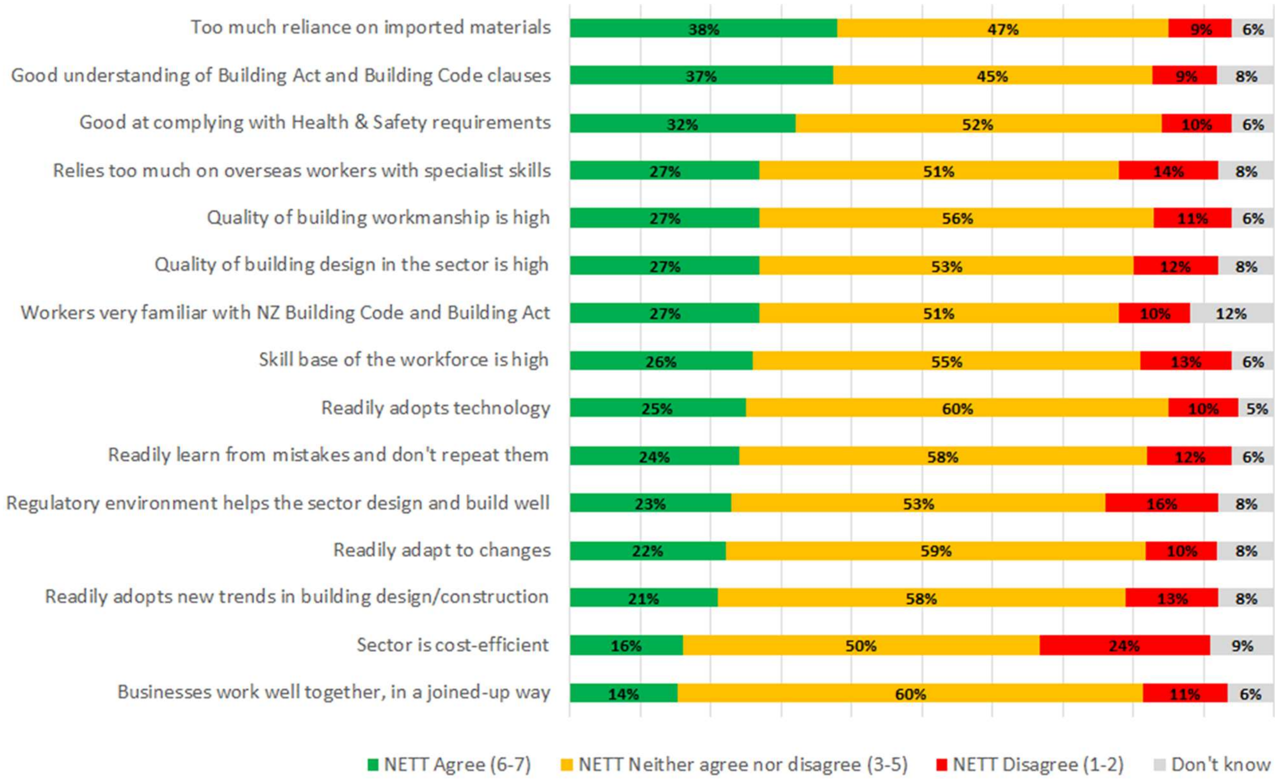
- For example, 27% of workers agreed with the statement: *Workers in the sector are very familiar with the NZ Building Code and Building Act* (compared with 22% of business owners/managers).

- However, agreement was, again, highest for the negatively phrased statement about imported materials (38%).

- Most other statements were agreed with by about 25-30% but, as for business owners/managers, most workers neither agreed nor disagreed with the statements, rating them between 3 and 5.

- Notwithstanding this, the statement about the cost-efficiency of the sector was again rated the lowest in terms of agreement (24% disagreement compared with 16% agreement).

Figure 10: Workers – Opinions about the building and construction sector (n=784)



Q17/18. Based on your experience, how much do you agree or disagree with each of the following?

As is the case for business owners/managers, there were also significant differences in workers' opinions. For example, in terms of the cost-efficiency of the sector, workers operating at the advanced/expert level were more likely to disagree that the sector is cost-efficient compared with those operating at the intermediate level (31% and 21% respectively).

6.2 Trust and confidence in sector 'players'

6.2.1 Business owners'/managers' trust and confidence in sector 'players'

Business owners/managers and workers were asked to rate their trust and confidence in sector 'players' using a 7-point trust and confidence scale. Table 52 presents the results based on the percentage with confidence (giving a rating of 6 or 7) compared with the percentage without confidence (giving a rating of 1 or 2).

Overall, business owners/managers stated they had a relatively **low** level of confidence in all the 'players', with *councils and local government*, and *overseas manufacturers*, recording the **lowest** levels of confidence (both under 10%).

In fact, four to five times as many business owners/managers stated they lacked confidence in these 'players' as those who said they had confidence in them. For example, 46% stated they did not have any confidence in *councils and local government* compared with 9% who said they did.

Table 52: Business owners/managers – Trust and confidence in 'players' in the sector

*Q21. Still based on your experience, to what extent do you have **confidence** in each of the following? By confidence we mean in terms of the impact they have on your ability to meet project deadlines, within budget and to the expected level of quality?*

	Business owners/ managers Have confidence*	Business owners/ managers Have no/little confidence^
Base =	1,029	1,029
	%	%
Local manufacturers of products used in the Building & Construction Sector	14	24
Transport companies that deliver ordered products	14	21
Retailers of products used by the Building & Construction Sector	10	24
Councils and local government	9	46
Overseas manufacturers of products that are imported into New Zealand	8	35
Total	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of business owners/managers rating their level of trust and confidence with a 6 or 7 on the 7-point scale, indicating a positive level of trust and confidence.
^Percentages reflect the percentage of business owners/managers rating their level of trust and confidence with a 1 or 2 on the 7-point scale, indicating a negative level of trust and confidence.
Data is weighted, base number is the original number of interviews completed.

Business owners/managers significantly differed in terms of their level of trust and confidence in the sector 'players'. For example, about one-half of each of the following groups of business owners/managers had **no** trust and confidence in *councils and local government* (Table 53):

- Sixty-two percent of business owners/managers whose business had a negative financial performance for YE 31 March 2022 (compared with 39% for those whose business had a relatively positive performance).
- Fifty-two percent of business owners/managers whose future business plan involved becoming smaller or closing down (compared with 41% who planned to grow their business).
- Forty-nine percent of self-employed (compared with 36% for business owners/managers operating larger business with 20 or more staff).

Table 53: Business owners/managers – Trust and confidence in councils and local government

*Q21. Still based on your experience, to what extent do you have **confidence** in **councils and local government**?*

	Business owners/ managers	Negative financial performance	Businesses planning to become smaller/ close	Self-employed
Base =	1,029	147	132	252
	%	%	%	%
1 - Not at all confident	30	47	40	28
2	16	15	12	21
3	14	13	15	14
4	17	11	20	18
5	8	3	5	6
6	6	4	4	4
7 – Completely confident	3	2	2	2
Don't know	5	4	2	7
Total	100	100	100	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

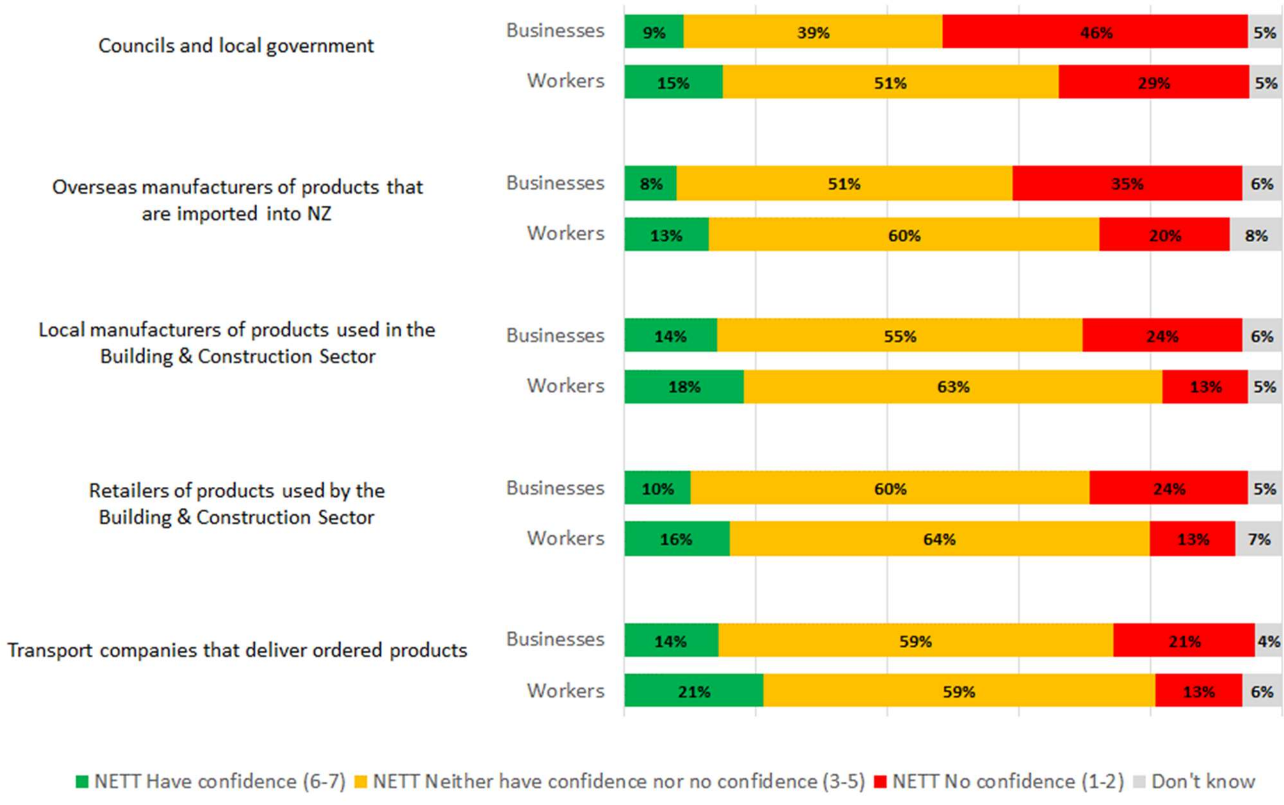
6.2.2 Workers' trust and confidence in sector 'players'

Figure 11 compares workers' trust and confidence in the sector 'players' with the levels of trust and confidence recorded for business owners/managers.

This shows that workers were relatively less negative in terms of their opinions of the sector 'players' compared with business owners/managers, although the results are still low in absolute terms.

For example, twice as many workeasrs stated they lacked confidence in *councils and local government* as said they have confidence in them (29% and 15% respectively).

Figure 11: Trust and confidence (Business owners/managers: n=1,029; Workers: n=784)



Q21. Still based on your experience, to what extent do you have confidence in each of the following? By confidence we mean in terms of the impact they have on your ability to meet project deadlines, within budget and to the expected level of quality? [Business Owners]
Q19. Still based on your experience, to what extent do you have confidence in each of the following? By confidence we mean in terms of the impact they have on your ability to meet project deadlines, within budget and to the expected level of quality? [Workers]

As for business owners/managers, there were significant differences in the level of trust and confidence that workers have in *councils and local government* (Table 54). For example, the following groups had **no** trust and confidence:

- Thirty-nine percent of workers who had worked in the sector for 10 years or more (compared with 21% for those who had worked in the sector for 2 to 6 years).
- Thirty-six percent of workers operating at the advanced/expert level (compared with 19% operating at an experienced level).
- Thirty-three percent of older workers (i.e., those aged 40 years and over) (compared with 22% for workers under 30 years).

Table 54: Workers – Trust and confidence in councils and local government

*Q19. Still based on your experience, to what extent do you have **confidence** in **councils and local government**?*

	Workers	Worked in sector for 10 years+	Workers at advanced/ expert level	Workers 40 years+
Base =	784	244	320	506
	%	%	%	%
1 - Not at all confident	17	27	24	20
2	12	12	12	13
3	16	20	18	17
4	20	15	17	17
5	15	11	12	13
6	10	5	10	10
7 – Completely confident	5	3	2	4
Don't know	5	7	4	5
Total	100	100	100	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

6.2.3 End-users' trust and confidence in sector 'players'

In comparison to business owners/managers and workers, end-users were asked to rate their trust and confidence in a different set of 'players'. Table 55 shows that *engineers, surveyors,* and *architects and designers* recorded relatively positive results compared with some of the other 'players' (based on the percentage of end-users giving a rating of 6 or 7 on the 7-point scale used to measure trust and confidence).

This was particularly the case for *councils and local government*, which at 17% for all end-users was only half the level of trust and confidence recorded by *engineers* (36%).

Table 55: End-users – Trust and confidence in 'players' in the sector

Q33/54/72. About how much trust and confidence would you say you have in each of the following?

	End-users Have trust and confidence (6-7)	Recent home builders and renovators Have trust and confidence (6-7)	Delayers Have trust and confidence (6-7)	Planners Have trust and confidence (6-7)
Base =	1001*	449*	276*	276*
	%	%	%	%
Engineers	36	39	31	35
Land surveyors	32	34	28	32
Architects and designers involved in the Building & Construction Sector	29	31	27	27
The building trade	27	31	24	23
Suppliers of materials	23	26	20	20
Local councils	17	21	16	10
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of end-users rating their level of trust and confidence with a 6 or 7 on the 7-point scale, indicating a positive level of confidence.

In addition to asking end-users about their trust and confidence in these 'players', they were also asked to what extent they agreed with several statements specifically about tradespeople.

Table 56 overleaf is based on the percentage giving a rating of 6 or 7 on the 7-point scale used to measure agreement. It shows relatively modest levels of agreement, with the best result being in relation to tradespeople's observance of the 'regulations and standards' (41%).

In comparison, the lower results for *value for money* (25%) and *trust and confidence* and *'cutting corners'* (21%), might be related to the results presented in earlier sections of this report, especially in relation to the impacts of the COVID-19 pandemic, the causes of delays and non-complying behaviour and practices.

Table 56: End-users – Beliefs about tradespeople

Q34/55/73. About how much do you agree or disagree with each of the following?

Base =	End-users Agreement (6-7) 1001* %	Recent home builders and renovators Agreement (6-7) 449* %	Delayers Agreement (6-7) 276* %	Planners Agreement (6-7) 276* %
Most tradespeople will comply with the necessary regulation and standards	41	40	40	44
Most tradespeople offer good value for money	23	25	23	21
People can have trust and confidence in tradespeople to get their job done well	25	25	24	26
Most tradespeople will 'cut corners' to save time or money	21	23	25	14

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of end-users rating their agreement with a 6 or 7 on the 7-point scale, indicating a positive level of agreement.

End-users' trust and confidence in tradespeople appeared to be largely unchanged when compared to the situation in 2021 (as reported in MBIE's commissioned research: *The COVID-19 pandemic and its impact on building system actors*). In 2021, for example, 25% of end-users agreed that people can have trust and confidence in tradespeople to get the job done and 19% agreed that tradespeople offered good value for money (Table 57).

Table 57: End-users – Beliefs about tradespeople – 2022 compared with 2021

Q34/55/73. About how much do you agree or disagree with each of the following?

Base =	End-users Agreement (6-7) 2022 1001* %	End-users Agreement (6-7) 2021 1700* %
Most tradespeople will comply with the necessary regulation and standards	41	45
Most tradespeople offer good value for money	23	19
People can have trust and confidence in tradespeople to get their job done well	25	25
Most tradespeople will 'cut corners' to save time or money	21	17

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of end-users rating their agreement with a 6 or 7 on the 7-point scale, indicating a positive level of agreement.

6.3 Remedial work

Recent home builders and renovators were asked about any quality issues that had emerged, and as a result, whether any remedial work needed to be undertaken.

Table 58 shows that approximately one-fifth overall (21%) stated they had experienced quality issues requiring remediation. However, this varied significantly by whether the end-user was building new (41%), completing a major renovation (32%) or a minor renovation (14%).

These results should be considered in relation to the results presented earlier with respect to business owners'/managers' and workers' opinions about the standard of building quality in the building and construction sector (refer to Section 6.1) and end-users' opinions about tradespeople (refer to Section 6.2).

Table 58: End-users - Recent home builders & renovators – Quality issues requiring remediation

Q27. Was anything identified that needed to be redone because it wasn't quite right, or the quality wasn't up to standard, or the council inspector requested a fix?

	Recent home builders and renovators	Building new	Major renovation	Minor renovation
Base =	449	71	76	302
	%	%	%	%
Yes	21	41	32	14
No	69	45	57	78
Don't know	9	13	12	7
Would prefer not to say	0	1	0	0
Total	100	100	100	100

Total may not sum to 100% due to rounding.

The following two tables focus on the recent home builders and renovators who experienced quality issues and had remedial work undertaken. Table 59 overleaf shows that most issues were resolved either *immediately* (29%) or *within about one week* (26%), which would suggest that the issues were relatively minor. Others had taken longer to resolve (20%) and some had not yet been resolved (23%), although we do not know the timeframe involved in relation to these.

Interestingly, issues relating to new builds appeared to have been remediated relatively more quickly than those relating to minor renovations. Sixty-nine percent of the issues relating to new builds were resolved *immediately* or *within one week* compared with 39% of those relating to minor renovations. These differences should be treated as indicative because of the small sub-samples involved.

Table 59: End-users – Recent home builders & renovators – Timeframes to resolve remediation issues

Q28. How long did it take to resolve this matter (most recent matter)?

	Recent home builders and renovators
Base =	95*
	%
Hasn't been resolved yet	23
Resolved immediately	29
Resolved within about one week	26
Resolved within about one month	15
Took longer than one month to resolve	5
Would prefer not to say	1
Total	100

Total may not sum to 100% due to rounding.
*Sub-sample based on End-users who stated there were quality issues that need remediation.

Table 60 overleaf shows that many recent home builders and renovators experiencing quality issues requiring remediation had involved a third party (55%), while 44% had not. Most frequently, these third parties were the *architect's/architectural designer's industry/professional body* (23%), the *builder's industry/professional body* (20%) and/or the *local council* (17%).

Smaller percentages had involved *lawyers, the courts* and the *Building Disputes Tribunal*. These results should be considered in relation to the results presented earlier with respect to end-users' familiarity and satisfaction with the legal protection available to consumers (refer to Section 5.2).

These results appeared to differ based on whether the quality issue related to a new build, a major or minor renovation. For example, the architect's/architectural designer's *industry/professional body* and/or the *builder's industry/professional body* were more likely to be involved if the issue related to a new build. Third parties were less likely to be involved in the case of a quality issue relating to a minor renovation. However, these differences should be treated as indicative because of the small sub-samples involved.

Table 60: End-users – Recent home builders & renovators – Parties involved in remediation

Q29 Did you involve (have you involved) any of the following (for the issues you mentioned in the previous question)?

	Recent home builders and renovators
Base =	95*
	%
The architect's/architectural designer's industry/professional body (e.g., NZIA)	23
The builder's industry/professional body (e.g., Certified Builders, Master Builders)	20
Local council	17
Your lawyer	12
A government department (e.g., MBIE, Building Practitioners Board)	11
Court	5
Building Disputes Tribunal	8
None of the above involved	44
Would prefer not to say	1
Total	**

Total may exceed 100% because of multiple responses.
* Sub-sample based on end-users who stated there were quality issues that need remediation.

6.4 Satisfaction with quality of build or renovation

Recent home builders and renovators whose new build or renovation was at least midway in terms of its completion or had been completed in the last 12 months were also asked about their overall satisfaction with the quality of their build or renovation.

Table 61 shows that the large majority (87%) stated they were satisfied, with almost one-half (46%) giving the best possible rating of *very satisfied*.

Again, these results should be considered in relation to the results presented earlier with respect to business owners'/managers' and workers' opinions about the standard of building quality in the building and construction sector (refer to Section 6.1).

Comparing the current satisfaction results with those recorded in MBIE's 2021 commissioned research: *The COVID-19 pandemic and its impact on building system actors,* suggests a higher rate of satisfaction. Last year, 74% of recent home builders and 86% of recent home renovators stated they were satisfied with their build.

Table 61: End-users – Recent home builders & renovators – Satisfaction level on quality of new build/ renovation

Q24. Overall, how satisfied are you with the quality of your [new build/renovation]?

	Recent home builders and renovators
Base =	142*
	%
Very dissatisfied	1
Dissatisfied	2
Neither satisfied nor dissatisfied	8
Satisfied	41
Very satisfied	46
Don't know	1
Total	100

Total may not sum to 100% due to rounding.
*Sub-sample based on end-users who stated their build/renovation was at least midway through completion.

An important aspect of satisfaction is price. The results presented overleaf show the estimated value of recent home builders' and renovators' build or renovation; whether this was lower or higher than the original quotation; and, if it was lower or higher, by how much as a percentage.

Table 62 overleaf shows the estimated value of recent home builders' and renovators' new builds and major and minor renovations. Table 63 (also overleaf) shows that, in the case of new builds (51%) and major renovations (49%), the estimated value was particularly higher than the original quotation. In turn, Table 64 (also overleaf) shows that more than 50% of recent home builders and renovators, with a new build or major renovation, estimated their costs had escalated by 21% or more.

Table 62: End-users – Recent home builders & renovators – Estimated value of building work

Q21. What is the estimated value of your building work?

	Recent home builders and renovators	Building new	Major renovation	Minor renovation
Base =	449	71	76	302
	%	%	%	%
Up to and including $25,000	43	0	21	58
$25,001-$50,000	13	0	18	15
$50,001-$100,000	8	6	18	6
$100,001-$250,000	5	7	12	3
$250,001- $500,000	5	18	7	2
$500,001-$750,000	6	32	4	1
$750,001-$1,000,000	3	14	7	0
$1,000,001- $1,500,000	1	6	0	0
$1,500,001 or more	3	13	4	0
Don't know	8	1	4	11
Would prefer not to say	4	3	5	4
Total	100	100	100	100

Total may not sum to 100% due to rounding.

Table 63: End-users – Recent home builders & renovators – Estimated value higher or lower than original quotation

Q22. Is this higher, lower or about the same as your original quote (or agreed price)?

	Recent home builders and renovators	Building new	Major renovation	Minor renovation
Base =	449	71	76	302
	%	%	%	%
Lower	5	1	0	7
About the same	54	44	46	58
Higher	30	51	49	20
Don’t know	10	4	5	13
Would prefer not to say	1	0	0	2
Total	100	100	100	100

Total may not sum to 100% due to rounding.

Table 64: End-users – Recent home builders & renovators – Percentage higher than the original quotation

Q23. About how much higher?

Base* =	Recent home builders and renovators 156 %	Building new 37^ %	Major renovation 37^ %	Minor renovation 82 %
Up to and including 10%	24	22	16	29
Between 11-20%	29	16	24	37
Between 21-50%	24	30	35	16
Between 51-75%	9	22	14	1
Between 76-100%	3	8	0	2
More than 100%	4	3	8	4
Don't know	5	0	3	9
Would prefer not to say	1	0	0	2
Total	100	100	100	100

Total may not sum to 100% due to rounding.
*Sub-samples based on Recent home Builders & renovators whose estimated value is higher than the original quotation.
^Caution: low base number of respondents - results are indicative only.

7.0 Future expectations and plans

This section of the report focuses on questions which asked business owners/managers about their business expectations, business plans and what these were most dependent on.

We also report on workers' expectations in terms of the business they were currently working for, as well as what their immediate and longer-term plans are.

Finally, we report on the results to questions asked of two groups of end-users (delayers and planners) to identify when they proposed to recommence or start, and the factors their start dates were most dependent on.

Key results

- Three-in-every-four business owners/managers stated they were confident that their business would still be operating in the immediate future, with no significant differences between the results for the next 12 months (74%) and the next 24 months (69%). However, around 25% were **not** confident in relation to each of these time periods.
- Most frequently, business owners/managers stated they had about *6 months' forward work* (42%). A similar percentage (40%) said they had more than this. On the other hand, 11% stated they had **no** forward work.
- Over one-half of business owners/managers (54%) intended their business to *stay about the same size* as it is now in the next 12 months, while 30% said they planned for it to *grow*. The remainder stated they planned to become *smaller* (9%) or *close down* (3%).
- A little over one-half of end-users described as delayers (56%) stated they planned to commence their builds and renovations within the next 12 months. However, 20% had longer timeframes and 23% said they did not know.

7.1 Business confidence, forward work and future business plans

7.1.1 Business confidence

Business owners/managers were asked how confident they were that their business would still be operating in 12 months' and 24 months' time. Table 65 shows that three-in-every-four were confident that their business would still be operating, with **no** significant differences between the results for the next 12 months (74%) and the next 24 months (69%).

However, in contrast, about 25% were **not** confident in relation to each of these time periods.

Table 65: Business owners/managers – Business confidence

Q22/22a. How confident are you that this business will be operating in 12 months' time/24 months' time?

	Business owners/managers Business confidence next 12 months	Business owners/ managers Business confidence next 24 months
Base =	1029	1029
	%	%
Very confident	44	39
Confident	30	30
Unsure	24	26
Don't know	1	4
Would rather not say	1	1
Total	100	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Table 66 overleaf examines the relationship between business confidence **in the next 12 months** and **financial performance** for YE 31 March 2022. This shows that business owners/managers who stated their business had a positive financial performance expressed a **higher** level of confidence compared with those who said their business had a negative performance (92% and 41% respectively).

Of note is the fact that eight times as many business owners/managers who stated their business had a negative performance said they were unsure whether their business would be operating in next 12 months' time (56% compared with 7% for those whose business had a positive financial performance).

Table 66: Business owners/managers – Business confidence by financial performance YE 31 March 2022

Q10. Overall, to what extent would you say this business had a financially successful year?
Q22. How confident are you that this business will be operating in 12 months' time?

Base =	Business owners/ managers 1029	Business owners/managers Positive financial performance last 12 months 212*	Business owners/managers Negative financial performance last 12 months 147**
	%	%	%
Very confident	44	65	18
Confident	30	27	23
Unsure	24	7	56
Don't know	1	0	2
Would rather not say	1	0	1
Total	100	100	100

Total may not sum to 100% due to rounding.
*Sub-sample based on those business owners/managers who considered their financial performance was relatively positive (rated 6-7 on the 7-point scale at Q10).
**Sub-sample based on those business owners/managers who considered their financial performance was relatively negative (rated 1-2 on the 7-point scale at Q10).
Data is weighted, base number is the original number of interviews completed.

The following groups of business owners/managers were also significantly **more confident** that their business would still be operating in 12 months' time:

- Those wanting their business to grow in the next 12 months (59% compared with 7% of those who plan to make their business smaller or close down).
- Those operating larger businesses with 20 or more staff (51% were confident compared with 36% of self-employed).
- Those operating businesses with larger turnovers of $1 million or more (50% compared with 29% of those operating businesses with turnovers of up to $100,000).
- Those with businesses that had been operating for 10 or more years (49% compared with 28% for those operating between 2 and 6 years).

7.1.2 Forward work

Another significant predictor of business confidence is the amount of **forward work** that business owners/managers stated they had.

Table 67 shows that, most frequently, business owners/managers stated they had about *6 months' forward work* (42%). A similar percentage (40%) said they had more than this. On the other hand, 11% stated they had **no** forward work.

The table also shows that business owners/managers who stated their business had a positive financial performance for YE 31 March 2022 were **more likely** to say that it had sufficient forward work. In fact, 55% stated they had more than 6 months' forward work compared with 20% who stated their business had a negative performance.

Table 67: Business owners/managers – Forward work by financial performance YE 31 March 2022

*Q10. Overall, to what extent would you say this business had a **financially** successful year?*
Q27. At this stage, about how much forward work would you say the business has?

Base =	Business owners/ managers 987^	Business owners/ managers Positive financial performance last 12 months 206*	Business owners/ managers Negative financial performance last 12 months 130**
	%	%	%
No forward work	11	6	30
Sufficient work to keep it busy for up to 6 months	42	36	42
7-12 months' work	23	33	10
More than 1 years' work, but less than 2 years	11	10	8
More than 2 years' work	6	12	2
Don't know	4	2	6
Would rather not say	2	1	2
Total	100	100	100

Total may not sum to 100% due to rounding.
^ Sub-sample excludes businesses planning to close.
*Sub-sample based on those business owners/managers who considered their financial performance was relatively positive (rated 6-7 on the 7-point scale at Q10).
**Sub-sample based on those business owners/managers who considered their financial performance was relatively negative (rated 1-2 on the 7-point scale at Q10).
Data is weighted, base number is the original number of interviews completed.

Reflecting the differences outlined above in terms of business confidence, business owners/managers wanting their business to grow (50%), those operating larger businesses with 20 or more staff (64%) and businesses with higher turnovers of $1 million or more (55%), all stated they had more than 6 months forward work.

7.1.3 Future business plans

Table 68 shows that, in the next 12 months, 54% of business owners/managers intended their business to stay *about the same size as it is now*, while 30% said they planned for it to *grow*. The remainder stated they planned to become *smaller* (9%) or *close down* (3%).

Table 68: Business owners/managers – Business plans

Q23. Which one of the following best describes this business's plans for the next 12 months? Does the business want to...

	Business owners/ managers
Base =	1029
	%
Grow	30
Stay more or less the same size as it is now	54
Become smaller	9
Close down	3
Don't know	2
Would rather not say	1
Total	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Future business plans were related to business performance, forward work and business confidence. With this in mind, Table 69 overleaf examines the relationship between business plans and financial performance for YE 31 March 2022.

As expected, this shows that a greater percentage of business owners/managers who stated their business had a positive financial performance (40%) also said they were planning for their business to *grow* compared with those whose business had a negative performance (23%).

Table 69: Business owners/managers – Business plans by financial performance YE 31 March 2022

Q23. Which one of the following best describes this business's plans for the next 12 months? Does the business want to…

*Q10. Overall, to what extent would you say this business had a **financially** successful year?*

Base =	Business owners/ managers 1029	Business owners/ managers Positive financial performance last 12 months 212*	Business owners/ managers Negative financial performance last 12 months 147**
	%	%	%
Grow	30	40	23
Stay more or less the same size as it is now	54	51	52
Become smaller	9	5	10
Close down	3	3	10
Don't know	2	1	5
Would rather not say	1	0	1
Total	100	100	100

Total may not sum to 100% due to rounding.
*Sub-sample based on those business owners/managers who considered their financial performance was relatively positive (rated 6-7 on the 7-point scale at Q10).
**Sub-sample based on those business owners/managers who considered their financial performance was relatively negative (rated 1-2 on the 7-point scale at Q10).
Data is weighted, base number is the original number of interviews completed.

In addition to these differences in terms of past performance, business owners/managers operating larger businesses with 20 or more staff (46%), and businesses with higher turnovers of $1 million or more (41%), were more likely to state they wanted their business to grow in the next 12 months.

7.1.4 Factors determining future business plans

Depending on business owners'/managers' future business plans, they were asked to identify the factors these plans would be most dependent on. These factors were presented in three groups, namely: those of a **general** nature (mostly economic); those that relate to the **building and construction sector;** and those that relate specifically to business owners'/managers' **own business**.

The degree to which these groups of factors would influence their plans was asked independently, in turn. Table 70 overleaf shows the results in a single table. The table highlights the following as the factors that were most frequently mentioned as influential by all business owners/managers:

- The most influential factors of a **general** nature, mentioned by more than one-half of all business owners/managers were:
    - *New Zealand's economic situation in general* (75%).
    - *The government's strategies for the building and construction sector* (53%).

- *The demand for work (more/less)* was the only factor relating to the **building and construction sector** that was mentioned by more than one-half of business owners/managers (72%) as being influential.

- Two factors, relating to business owners'/managers' **own business**, were mentioned as being influential by more than one-half:

    - *getting more/fewer enquiries/projects from customers* (60%).

    - *availability of specified materials* (51%).

All these factors were mentioned to a greater extent by those business owners/managers who stated they wanted their businesses to grow. For example, 81% of these business owners/managers identified *New Zealand's economic situation in general* as an influential factor compared with 75% of all business owners/managers.

Importantly, more than one-half of business owners/managers who wanted their business to grow also identified **workforce** issues as being influential (e.g., 57% for g*etting more/losing staff*).

Other factors were mentioned as influential to a lesser extent by all business owners/managers. However, some relate to results presented earlier in this report about the impact of the COVID-19 pandemic, costs and workforce issues.

Table 70: Business owners/managers – Factors influencing future business plans

*Q24. In the previous question you said your business plans to … [grow, stay the same, become smaller/close]. In your opinion, which of these factors is this business's future plans most dependent on? These are **general** factor.*
*Q25 And which of these will affect your business's plans? These factors relate to your **industry**.*
*Q26. And which of these will affect your business's plans? These relate to your **business**.*

Base =	Business owners/ managers 995* %	Plan to grow 314 %	Plan to stay the same 549 %	Plan to downsize/ close 132 %
General (economic) factors:				
New Zealand's economic situation in general	75	81	76	55
The government's strategies for the Building & Construction Sector	53	55	52	50
The world economic situation in general	43	47	43	33
The way the impact of the COVID-19 pandemic is managed	41	44	42	33
Personal/family reasons (e.g., your health, plans to retire)	31	18	38	34
Specific regional conditions (e.g., demand for more construction work due to an earthquake)	29	33	30	13
Borders restrictions being lifted	20	32	15	15
Other general factors	6	6	6	9
Factors relating to the Building & Construction Sector:				
The demand for work (more/less)	72	78	77	42
What happens to the availability of labour (more/less)	40	53	35	30
What happens to compliance costs	39	40	39	35
The skill level of the workforce	36	55	29	26
What happens to workforce numbers (more/less)	33	46	29	23
The amount of compliance	33	33	34	29
The culture of the sector (e.g., changing it to be a more high-performing sector)	17	24	14	13
Whether there are changes to building regulations	32	35	33	23
Other factors relating to your industry	6	4	6	8
Factor relating to Business owners'/managers' businesses:				
Getting more/fewer enquiries/projects from customers	60	65	63	33
Availability of specified materials	51	57	51	33
Business owner's stress levels	45	40	47	47
Pricing jobs accurately	40	40	46	14
Getting more/losing staff	39	57	32	28
Sub-contractors'' availability	34	37	34	24
Staff's stress levels	28	35	25	25
Upskilling your staff	27	40	24	10
Cutting operating costs	25	28	25	23
Obtaining consent	23	25	23	18
Having better/different processes in order to be more efficient	20	30	16	12

Continued

Table 70: Business owners/managers – Factors influencing future business plans (continued)

*Q24. In the previous question you said your business plans to … [grow, stay the same, become smaller/close]. In your opinion, which of these factors is this business's future plans most dependent on? These are **general** factor.*
*Q25 And which of these will affect your business's plans? These factors relate to your **industry**.*
*Q26. And which of these will affect your business's plans? These relate to your **business**.*

Base =	Business owners/ managers 995* %	Plan to grow 314 %	Plan to stay the same 549 %	Plan to downsize/ close 132 %
Becoming more technological (e.g., using new software, tools, or modern machinery)	18	22	17	15
Access to working capital (e.g., from the bank)	16	23	13	12
Becoming more digital (e.g., using apps on phones)	12	17	10	6
Having a different management style	8	11	7	8
Having a different business model	6	10	4	7
Access to investment capital	6	11	5	3
Other factors relating to your business	2	1	2	4
Don't know	2	2	2	4
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on those business owners/managers who provided a response and excludes non-specifiers.
Data is weighted, base number is the original number of interviews completed.

7.1.5 Critical areas of information and advice

Given their business plans, business owners/managers were asked to identify the 'Top 3' areas in which they most **wanted help and advice** (Table 71).

Of note, few (15%) business owners/managers did **not** identify any area. Business owners/managers wanting their business to grow or wanting to downsize identified the **most** areas of help and advice and were less likely to identify none (8%) compared to those wanting their business to stay the same size (20%).

Those wanting their business to grow most frequently identified three areas of support: *reducing their costs* (32%), *managing staff performance* (28%), *correctly pricing jobs* (26%) and *marketing and advertising* (26%).

On the other hand, business owners/managers wanting to downsize, most frequently identified: *correctly pricing jobs* (27%), *managing cash flow* (27%), *reducing costs* (25%) and *managing mental wellbeing* (23%).

To a large extent, these areas reflect the factors noted earlier as influencing their future business plans.

Table 71: Business owners/managers – Areas of help and advice by business plans

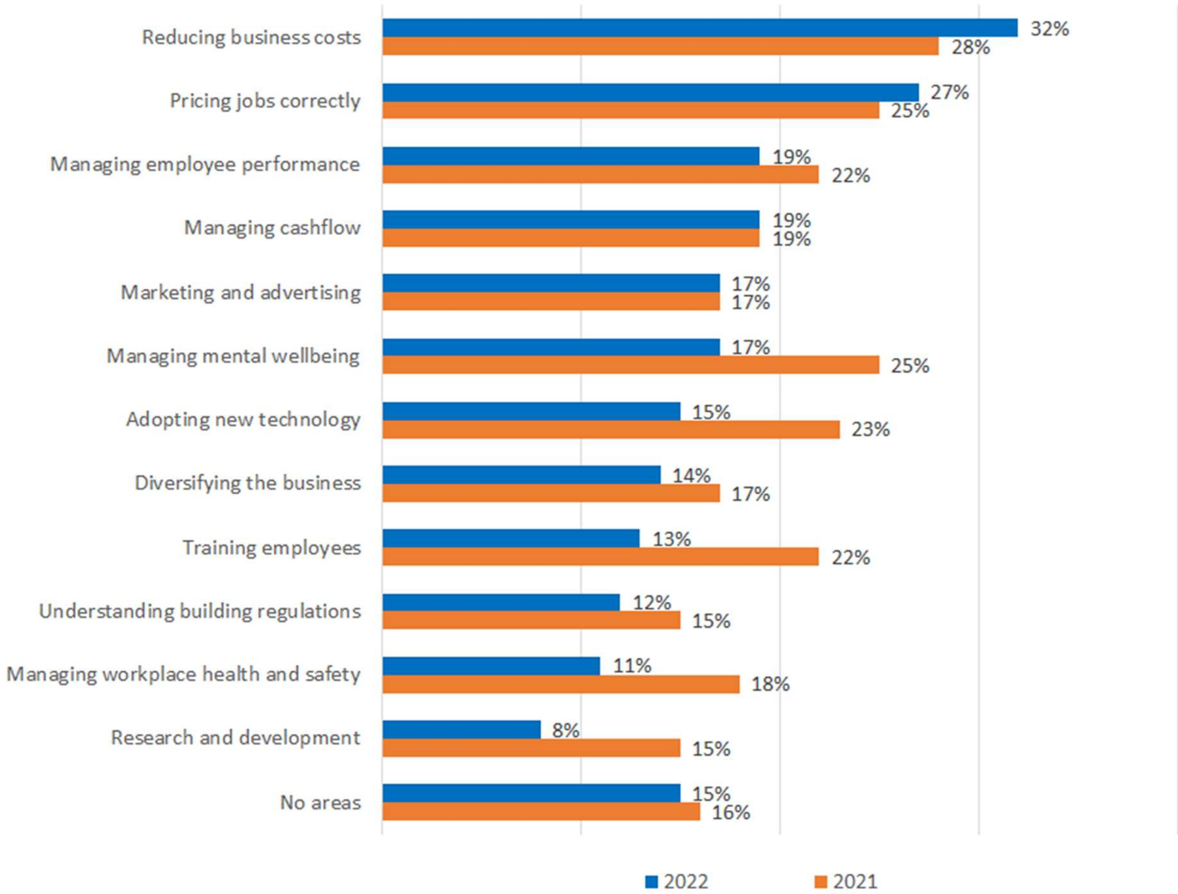
Q23. Which one of the following best describes this business's plans for the next 12 months?
Q28. What are the Top 3 areas of the business in which you would like the most help or advice?

	Business owners/ managers	Plan to grow	Plan to stay the same	Plan to grow smaller
Base =	995*	314	549	132
	%	%	%	%
Reducing business costs	32	32	33	25
Pricing jobs correctly	27	26	27	27
Managing employee performance	19	28	15	17
Managing cash flow	19	16	19	27
Marketing and advertising	17	26	13	15
Managing mental wellbeing	17	17	16	23
Adopting new technology	15	16	14	10
Diversifying the business	14	20	10	14
Training employees	13	18	11	9
Understanding building regulations	12	10	12	16
Managing workplace health and safety	11	9	13	7
Research and development	8	10	7	5
Other	4	3	3	4
No areas	15	8	20	8
Don't know	2	1	3	2
Would rather not say	1	1	1	0
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
* Sub-sample excludes businesses planning to close.
Data is weighted, base number is the original number of interviews completed.

As can be seen in Figure 12, the areas most frequently identified by business owners/managers were like those identified in MBIE's 2021 commissioned research: *The COVID-19 pandemic and its impact on building system actors.*

Figure 12: Business owners/managers – Areas of help and advice by business plans – 2022 compared with 2021 (2022 n=1,029; 2021 n=1,118)



Q28. What are the Top 3 areas of the business in which you would like the most help or advice?

7.2 Workers' satisfaction, expectations and future plans

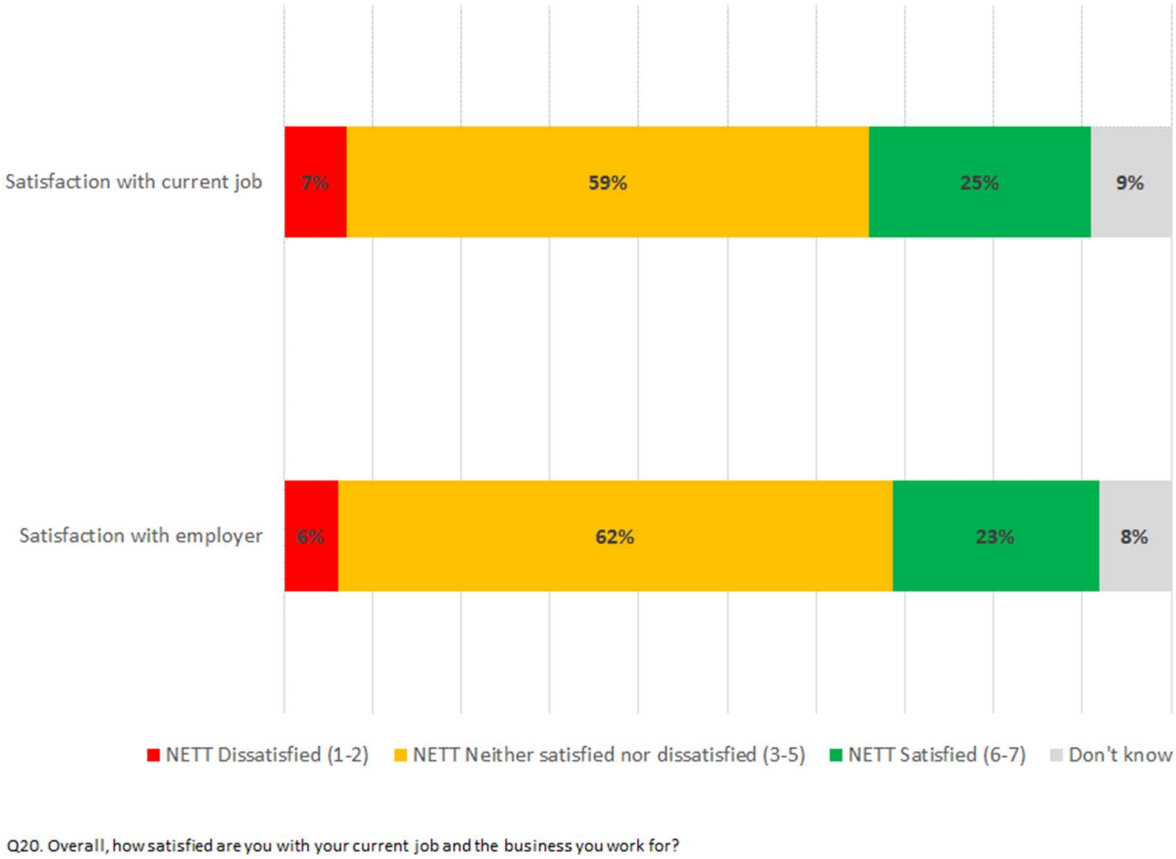
As outlined in earlier sections of this report, workers have been significantly impacted by the events of the last two years. Together with business owners/managers, they will play an important role in the immediate and longer-term future of the building and construction sector. With this in mind, this sub-section of the report outlines their expectations and future plans, beginning with how satisfied they are with their current situation.

7.2.1 Worker satisfaction

Figure 13 shows that approximately 25% of workers stated they were *satisfied* with their current job and the business they worked for, based on the percentage giving a 6 or 7 rating on the 7-point scale used to measure satisfaction.

In contrast, relatively few (around 5%) stated they were *dissatisfied* (giving a rating of 1 or 2); therefore, most (around 60%) rated themselves as *neither satisfied nor dissatisfied* (giving a rating of 3 to 5).

Figure 13: Workers – Job and employer satisfaction (n=784)



There were **no** significant differences by industry category, years working in the sector, experience level or by any demographic characteristics.

7.2.2 Workforce movements

Table 72 shows that almost one-half of workers (47%) stated they had worked in the building and construction sector for 10 years or more and 31% for the same business. On the other hand, 7% said they had worked in the sector for less than one year and 10% for the same business.

Table 72: Workers – Years working in the sector and in current job

Q5. About how long have you worked for the business you work for?
Q10. And about how long have you worked in the building and construction sector, in total?

	Workers Years in sector	Workers Years in job
Base =	784	784
	%	%
Less than 1 year	7	10
1 to less than 2 years	7	10
2 to less than 6 years	21	29
6 to less than 10 years	16	19
10 years or more	47	31
Don't know	1	0
Would rather not say	1	1
Total	100	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

Workers who had been working for the same employer for less than one year were asked whether they had come from a similar business. While most (54%) said they had not, 28% said they had and had resigned because they had become dissatisfied. In addition, 13% said their current employer attracted them with an offer they could not refuse.

The **'poaching'** of workers was reported earlier in this report (refer Section 5.1) as a behaviour that some business owners/managers had engaged in. It is also important to remember that having skilled staff was identified by business owners/managers as a factor for their relatively positive financial performance in the last 12 months (refer Section 3.2). Furthermore, the availability of (skilled) labour was a factor identified by business owners/managers as influencing their future business plans, particularly those wanting to grow their business (refer Section 7.1.4).

With this in mind, note that workers who stated they were at an experienced level were **more likely** to say that their current employer had attracted them with an offer they could not refuse (34%), although this result needs to be treated as indicative because of the small sub-sample.

Table 73 shows how long workers at each of the four different levels of experience (refer to Section 3.7 for definitions) had been working in their current job. As expected, over one-half of workers at an entry-level (59%) stated they have worked for their current business for only up to one year and 83% for up to two years in total.

However, there has clearly been recent movement at the more **skilled levels of the workforce** when the results for workers at the intermediate, experienced and advanced/expert levels were examined. For example, 29% of workers at the intermediate level said they had been working for their current business for just two years, 16% of those at the experienced level, and 7% at the advanced/expert level – suggesting they had moved between employers.

Table 73: Workers – Years working in current job by ability level

Q5. About how long have you worked for the business you work for?
Q3. Which one of the following best describes you?

	Workers	Entry-level	Intermediate	Experienced	Advanced/expert
Base =	784	69	123	236	320
	%	%	%	%	%
Less than 1 year	10	59	13	5	4
1 to less than 2 years	10	24	16	11	3
2 to less than 6 years	29	16	46	32	24
6 to less than 10 years	19	0	14	25	20
10 years or more	31	1	11	26	49
Don't know	0	0	0	1	0
Would rather not say	1	59	13	5	4
Total	100	100	100	100	100

Total may not sum to 100% due to rounding.
Data is weighted, base number is the original number of interviews completed.

To provide further insight, we have examined workers' reasons for joining the business they were now currently working for. Table 74 overleaf is based on the percentage of workers who rated each of several reasons with a 6 or 7 on the 7-point scale used to measure importance.

Overall, this shows **four** reasons were rated as important by over one-half of **all** workers, regardless of their experience:

- *I like the people I work with* (65%).
- *It has a reputation for doing good work* (62%).
- *It helps build my skills and confidence at problem solving in my job* (54%).
- *It gives me on-the-job training and other professional development opportunities* (52%).

Note that the last three reasons were more frequently rated as important by **entry-level** workers. For example, 66% rated: *It gives me on-the-job training and other professional development opportunities* as important, compared with 54% of those at an intermediate level, 53% of those at an experienced level and 48% at an advanced/expert level.

Over one-half of entry-level workers also rated the following reasons as important:

- *It trains me to be an innovative thinker* (55%).
- *It has a reputation for helping its staff when they become stressed* (52%).

Note also that more materially-oriented reasons were rated less frequently as important by all workers:

- *It pays a higher-than-average industry wage/salary* (44%).
- *It provides me with equipment and tools (e.g., mobile phone, laptop)* (42%).
- *It gives me extra perks (e.g., extra paid leave, flexible start-finish times, extra annual leave, company car)* (41%).

Similarly, the following reasons were rated less frequently as important, which should be considered given the results outlined earlier in this report relating to the opinions that are held about the building and construction sector (refer to Section 6.1):

- *It is an innovative company* (44%).
- *It helps me keep updated with industry regulations (e.g., health and safety requirements, changes in the Building Code)* (43%).
- *The business said it would help me gain further qualifications* (40%).

Table 74: Workers – Reasons for working for current business by ability level

Q7. How important a reason were each of the following for you when joining the business you are now working for?
Q3. Which one of the following best describes you?

	Workers	Entry-level	Intermediate	Experienced	Advanced
Base =	784	69	123	236	320
	%	%	%	%	%
I like the people I work with	65	61	65	67	63
It has a reputation for doing good work	62	70	51	62	64
It helps build my skills and confidence at problem solving in my job	54	65	47	52	56
It gives me on-the-job training and other professional development opportunities	52	66	54	53	48
It trains me to be an innovative thinker	48	55	39	45	51
It has a reputation for helping its staff when they become stressed	47	52	41	47	49
It pays a higher-than-average industry wage/salary	44	47	35	44	46
It is an innovative company	44	45	39	42	47
It helps me keep updated with industry regulations (e.g., H&S requirements, changes in the Building Code)	43	41	40	42	44
It provides me with equipment and tools (e.g., mobile phone, laptop)	42	45	37	40	45
It gives me extra perks (e.g., extra paid leave, flexible start-finish times, extra annual leave, company car)	41	40	33	39	44
The business said it would help me gain further qualifications	40	61	37	38	40
It allows me to work remotely (e.g., from home)	37	32	33	41	34

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of workers rating each statement with a 6 or 7 on the 7-point scale, indicating a positive level of importance.
Data is weighted, base number is the original number of interviews completed.

Table 75 examines these results by the amount of time workers have worked for their current employer. This confirms the importance of giving workers who have recently started working for a business (i.e., **up to two years**) *on-the-job training and other professional development opportunities*. Also of importance to these workers is *gaining further qualifications*, as well as *building their confidence in problem solving*.

Paying a *higher-than-average industry wage/salary* also tends to be important to workers who have recently started working for a business, but this is also important to workers at the other levels of experience as well.

Table 75: Workers – Reasons for working for current business by years worked for current business

Q7. How important a reason were each of the following for you when joining the business you are now working for?
Q5. About how long have you worked for the business you work for?

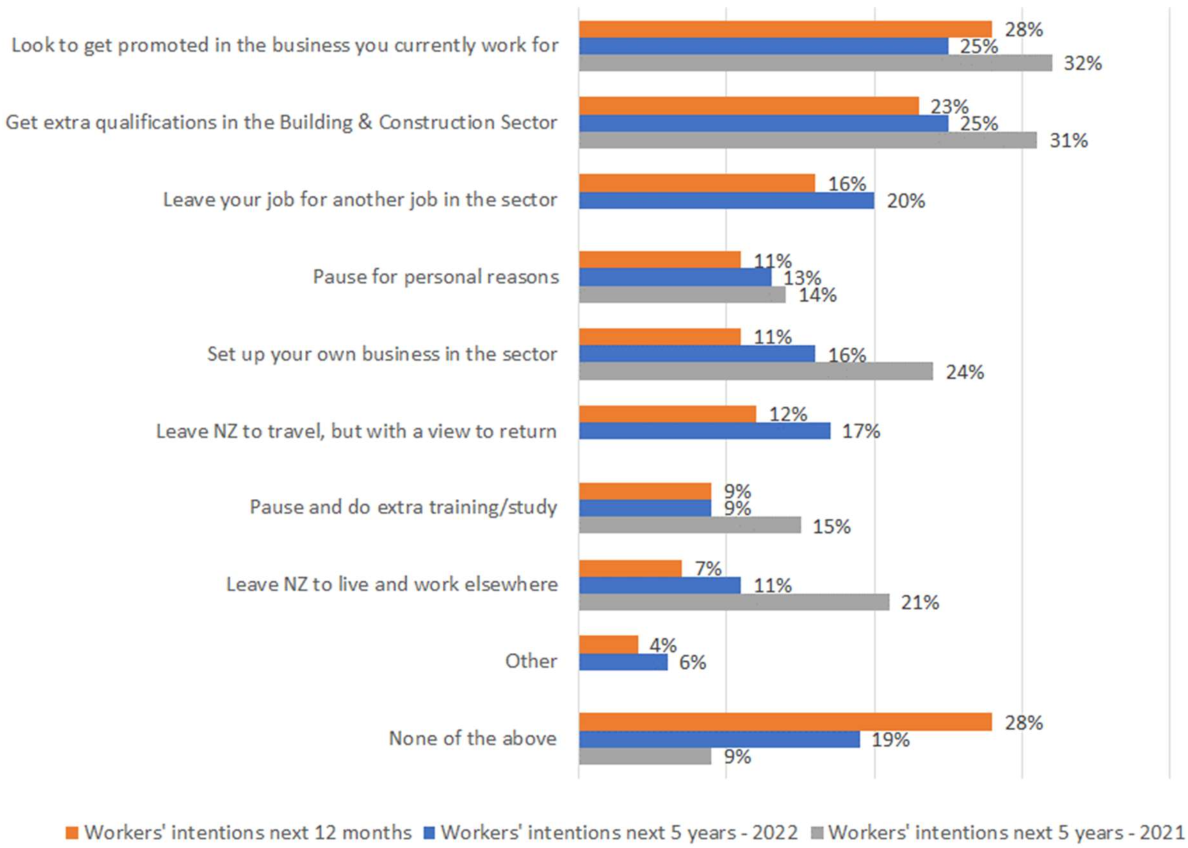
	Workers	<2 years	2-6 years	7-10 years	10+ years
Base =	784	169	230	135	244
	%	%	%	%	%
I like the people I work with	65	70	63	60	68
It has a reputation for doing good work	62	66	55	58	69
It helps build my skills and confidence at problem solving in my job	54	62	47	51	56
It gives me on-the-job training and other professional development opportunities	52	65	49	53	47
It trains me to be an innovative thinker	48	51	44	49	50
It has a reputation for helping its staff when they become stressed	47	51	45	46	49
It pays a higher-than-average industry wage/salary	44	50	35	46	49
It is an innovative company	44	43	42	48	45
It helps me keep updated with industry regulations (e.g., H&S requirements, changes in the Building Code)	43	42	39	45	46
It provides me with equipment and tools (e.g., mobile phone, laptop)	42	42	42	48	39
It gives me extra perks (e.g., extra paid leave, flexible start-finish times, extra annual leave, company car)	41	44	38	42	44
The business said it would help me gain further qualifications	40	50	36	40	40
It allows me to work remotely (e.g., from home)	37	40	35	45	34

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of workers rating each statement with a 6 or 7 on the 7-point scale, indicating a positive level of importance.
Data is weighted, base number is the original number of interviews completed.

7.2.3 Workers' future expectations and plans

Against this background, workers were asked about their future expectations and plans. Figure 14 shows that, in the very short-term, as well as the next 5 years, most workers will remain working in the sector; in most cases, to get promoted within the business they currently work for and/or gain extra qualifications. Note that some also intend to move between employers.

Figure 14: Workers – Future Plans (2022: n=784; 2021: n=1038)



Q22. Which of the following things do you plan to do within the next 12 months?
Q23. And what about the next five years?

In comparison to the current results, MBIE's 2021 commissioned research: *The COVID-19 pandemic and its impact on building system actors*, relatively fewer workers now say they plan to leave New Zealand, and fewer are looking to get promoted within the existing business they work and/or get further qualifications.

Figure 15 overleaf show what workers' immediate expectations were about their current job. The expectations are listed in descending order, reflecting the percentage of workers expecting each aspect to improve. However, in general, there was an expectation that their job would be either the **same as it is now or better**. This is particularly in relation to:

- *Pay rate* (47% expecting it to be the same and 37% better).

- *Autonomy at work (ability to self-manage)* (58% expecting it to be the same and 34% better).

- *Ability to get training/upskilling* (54% expecting it to be the same and 32% better).

- *Ability to use your skills at your work* (60% expecting it to be the same and 32% better).

In comparison, there was an expectation that the following were **less likely** to improve, with reasonably significant percentages of workers expecting them to become **worse**:

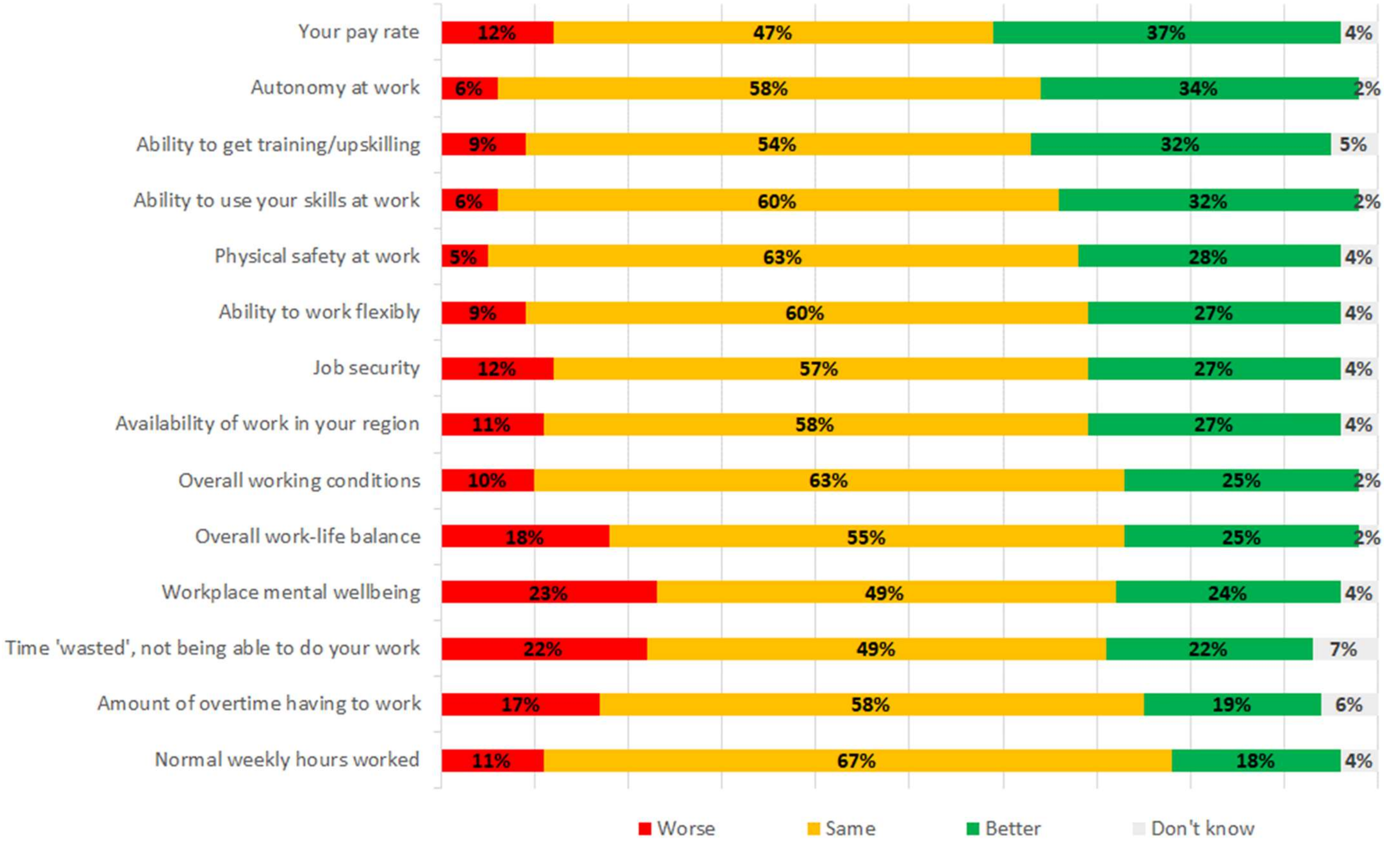
- *Workplace mental wellbeing* (23% expecting it to be worse, 49% the same and 24% better).

- *The amount of time 'wasted', not being able to do the work you plan to do* (22% expecting it to be worse, 49% the same and 22% better).

- *Overall work-life balance* (18% expecting it to be worse, 55% the same and 25% better).

- *The amount of overtime/long hours you have to work* (17% expecting it to be worse, 58% the same and 19% better).

Figure 15: Workers – Future expectations



Q21. Which of the following do you see getting better, worse or staying the same in the next 12 months?

Table 76 and Table 77 overleaf show what workers' immediate expectations were about their current job; firstly, in terms of their experience level and secondly, in terms of the industry category they work in. The expectations are listed in descending order, reflecting the percentage of workers expecting each aspect to improve.

The table shows that **entry-level** workers were the most optimistic that their situation would improve. For example, 49% expected an improvement in terms of *getting training and upskilling* (compared with 26% for workers operating at an advanced/expert level).

While 30% also expected their *pay rate* to improve, workers operating at an experienced and advanced/expert level were the most expectant of this (40% of experienced workers and 38% of advanced/expert workers).

Table 76: Workers – Future expectations by experience level

Q21. Which of the following do you see getting better, worse or staying the same in the next 12 months?
Q3. Which one of the following best describes you?

	Workers	Entry-level	Intermediate	Experienced	Advanced/ expert
Base =	784	69	123	236	320
	%	%	%	%	%
Your pay rate					
Worse	12	7	5	13	16
Same	47	52	58	43	44
Better	37	30	34	40	38
Autonomy at work					
Worse	6	9	4	6	7
Same	58	43	57	55	61
Better	34	46	37	39	30
Ability to get training/upskilling					
Worse	9	9	7	11	9
Same	54	38	45	52	61
Better	32	49	42	33	26
Ability to use your skills at work					
Worse	6	4	5	7	5
Same	60	44	57	55	66
Better	32	47	36	36	26
Physical safety at work					
Worse	5	6	7	4	6
Same	63	66	55	58	66
Better	28	23	34	32	24
Ability to work flexibly					
Worse	9	3	8	11	8
Same	60	70	60	58	58
Better	27	24	29	26	28
Job security					
Worse	12	6	8	13	12
Same	57	54	61	50	61
Better	27	36	28	29	24
Availability of work in your region					
Worse	11	3	11	11	12
Same	58	58	59	53	60
Better	27	35	24	31	25

Continued

Table 76: Workers – Future expectations by experience level (continued)

Q21 Which of the following do you see getting better, worse or staying the same in the next 12 months?

Q3. Which one of the following best describes you?

	Workers	Entry-level	Intermediate	Experienced	Advanced/expert
Base =	784	69	123	236	320
	%	%	%	%	%
Overall working conditions					
Worse	10	7	6	10	12
Same	63	68	61	61	64
Better	25	21	32	28	23
Overall work-life balance					
Worse	18	18	15	19	19
Same	55	49	55	52	58
Better	25	31	30	26	22
Workplace mental wellbeing					
Worse	23	20	21	23	25
Same	49	45	50	49	48
Better	24	33	27	24	23
Time 'wasted', not being able to do your work					
Worse	22	17	19	22	25
Same	49	46	47	46	53
Better	22	29	26	26	18
Amount of overtime having to work					
Worse	17	14	18	14	20
Same	58	55	62	55	58
Better	19	25	13	25	17
Normal weekly hours worked (impacting income)					
Worse	11	7	8	13	12
Same	67	63	65	64	70
Better	18	23	22	22	15

Total may exceed 100% because of multiple responses.
Data is weighted, base number is the original number of interviews completed.

Table 77 overleaf provides the same analysis by industry category. This shows that, in general, there was **no** clear pattern in terms of workers' expectations by industry category, with some notable exceptions:

- Thirty percent of workers involved in residential building construction expected *the amount of time 'wasted', not being able to do the work you plan to do* would get worse (compared with 18% for those involved in heavy and civil engineering/land development).

- Thirty percent of workers involved in heavy and civil engineering/land development and 26% of those involved in residential building construction expected *workplace wellbeing* to get worse (compared with 19% of workers involved in building installation/completion).

- Workers involved in heavy and civil engineering/land development also expected *overall working conditions* to get worse (19% compared with 7% for all other groups).

Table 77: Workers – Future expectations by industry category

Q21. Which of the following do you see getting better, worse or staying the same in the next 12 months?
Q1. Which one of the following best describes the industry the business you work for mainly operates in?

	Workers	Residential building	Heavy and civil engineer-Ing/land development	Building installation/ completion	Architect., engineering, etc.
Base =	784	201	93	162	133
	%	%	%	%	%
Your pay rate					
Worse	12	11	17	8	14
Same	47	49	41	51	41
Better	37	35	38	38	42
Autonomy at work					
Worse	6	3	14	3	3
Same	58	64	49	53	62
Better	34	31	36	42	35
Ability to get training/upskilling					
Worse	9	8	6	5	17
Same	54	58	48	58	52
Better	32	27	42	32	28
Ability to use your skills at work					
Worse	6	3	10	1	8
Same	60	59	53	64	59
Better	32	36	33	32	31
Physical safety at work					
Worse	5	6	7	3	3
Same	63	66	52	64	69
Better	28	22	34	30	23
Ability to work flexibly					
Worse	9	5	12	5	8
Same	60	66	55	61	59
Better	27	23	30	27	28
Job security					
Worse	12	13	13	10	10
Same	57	62	45	57	65
Better	27	22	40	26	20
Availability of work in your region					
Worse	11	8	17	10	11
Same	58	64	47	58	59
Better	27	26	32	27	25

Continued

Table 77: Workers – Future expectations by industry category (continued)

Q5. About how long have you worked for the business you work for?
Q1. Which one of the following best describes the industry the business you work for mainly operates in?

	Workers	Residential building	Heavy and civil engineer-Ing/land development	Building installation/ completion	Architect., engineering, etc.
Unweighted base =	784	201	93	162	133
	%	%	%	%	%
Overall working conditions					
Worse	10	7	19	7	7
Same	63	67	50	65	67
Better	25	22	30	26	25
Overall work-life balance					
Worse	18	22	23	15	14
Same	55	49	53	52	62
Better	25	26	24	31	23
Workplace mental wellbeing					
Worse	23	26	30	19	19
Same	49	50	33	53	56
Better	24	20	35	25	22
Time 'wasted', not being able to do your work					
Worse	22	30	18	21	23
Same	49	47	50	48	50
Better	22	17	27	24	21
Amount of overtime having to work					
Worse	17	16	23	13	14
Same	58	58	52	59	67
Better	19	19	19	20	14
Normal weekly hours worked (impacting income)					
Worse	11	8	14	10	11
Same	67	69	54	71	70
Better	18	19	24	15	17

Total may exceed 100% because of multiple responses
Data is weighted, base number is the original number of interviews completed.

When this year's worker expectations were compared with the findings from MBIE's 2021 commissioned research: *The COVID-19 pandemic and its impact on building system actors,* the general conclusion was that workers were now less likely to state that they see their overall work-life balance, working conditions or job security improving.

For example, in 2021, 35% of workers envisaged their overall work-life balance improving, but this is now 25%. Additionally, a higher percentage saw this aspect of their job as becoming worse (18% compared with 4% in 2021).

7.3 End-users’ future building plans

As reported earlier, business owners’/managers’ future business plans will, to a certain extent, be influenced by consumer demand (refer to Section 7.1.4). In this section, we examine end-users’ future building plans; specifically, when delayers intend to recommence their builds and renovations, as well as what factors this will be dependent on.

Table 78 shows that a little over one-half of delayers (56%) stated they planned to commence their builds and renovations within the next 12 months. However, 20% had longer timeframes and 23% said they did not know. The table shows that there were **no** significant differences by the type of build or renovation.

Table 78: Delayers - Build timeframes

Q49. At this stage, when are you likely to start your build or renovations?

	Delayers	Building new	Major renovation	Minor renovation
Base =	276*	31*	85*	160
	%	%	%	%
Within the next 3 months	15	19	12	16
In 4-6 months' time	19	6	18	22
In 7-12 months' time	22	26	20	23
In 1-2 years' time	16	16	15	16
In 3 years' time or more	4	6	6	2
Don't know	23	23	27	21
Would rather not say	1	3	2	0
Total	100	100	100	100

Total may not sum to 100% due to rounding.
Caution: low base number of respondents - results are indicative only.

Delayers and planners were asked to rate several factors in terms of the influence they would have on their build/renovation timeframes. Table 79 overleaf is based on the percentage rating each factor 6 or 7, on the 7-point scale, measuring the degree to which the factor would be influential.

This shows that the factors rated as influential by delayers and planners differed. For example, reflecting the impact of the cost increases that end-users had been experiencing (refer to Section 3.4), 47% of delayers rated *when my personal financial situation changes* as being influential in their decision-making in terms of when they would recommence their build or renovation. This was closely followed by: *When building costs stabilise* (34%) and *when preferred materials/products become available* (33%).

These factors were also identified as being influential by planners. However, the first two were rated less frequently. For example, 27% of planners rated *when my personal financial situation changes* as being influential compared with 47% of delayers.

Table 79: Delayers and Planners – Factors influencing build/renovation timelines

Q50. How much would you say each of these will be a deciding factor in terms of when you will start? [Delayers]
Q68. You have said that you plan to start [building a new house/townhouse/apartment/unit or your renovations] in the next 12 months. How much would you say each of these will be a deciding factor in your plan to build or renovate? [Planners]

	Delayers	Planners
Base =	276	276
	%	%
When your personal financial situation changes	47	27
When building costs stabilise	34	24
When your preferred materials/products become available	33	31
When other aspects of your personal situation change (e.g., health)	31	16
When COVID-19 disruptions become more manageable at a national / international level	29	19
When a builder becomes available	27	28
When your <u>preferred</u> builder becomes available	27	26
When you get consent	15	19
When an architect/architectural designer becomes available	11	9
When your <u>preferred</u> architect/architectural designer becomes available	10	11
Total	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of Workers rating each statement with a 6 or 7 on the 7-point scale, indicating a positive level of importance.

8.0 Changes to staff numbers, future requirements, plans and barriers

Earlier in this report (refer to Section 7.1), we outlined business owners'/managers' future plans for their business, noting that while most (54%) planned to stay about the same size, 30% planned to grow.

As part of this, we also identified the factors that would be most influential in terms of realising these plans and noted that for many business owners/managers, and especially those planning to grow their business, workforce factors were frequently identified; that is, the availability of labour, the skill level of staff and the ability to recruit and retain staff.

In this section of the report, we report on the results of more detailed questioning relating to business owners' future staffing requirements and any issues they were experiencing in being able to recruit staff.

This is against the background of the information presented in Section 3.7, about changes in staff numbers compared with the previous 12 months. We begin by investigating these changes further, from the perspective of business owners/managers who stated they were planning for their businesses to grow.

Key results

- Thirty-six percent of business owners/managers stated they now wanted more entry-level staff, 44% wanted more intermediate staff, 57% wanted more experienced staff, and 41% wanted more advanced/expert staff.

- Most frequently, these staff were *tradespeople* (54%), with around one-half of both business owners/managers wanting their business to grow or stay about the same in size mentioning this. Other frequently mentioned staff types included *supervisors and team leaders* (27%), as well as *technical people* (27%).

- *Tradespeople* were also most frequently identified by 46% as the type of staff that business owners/managers wanting to recruit workers were having difficulties recruiting. Similarly, *supervisors and team leaders* and *technical people* were also identified as the types of staff business owners/managers were having difficulties recruiting (21% were having difficulties recruiting *supervisors and team leaders* and 22% *technical people*).

- Business owners/managers wanting more staff, but having difficulties recruiting them, most frequently stated that this was because *there are not enough (staff)* to meet demand (67%). Also mentioned were reasons related to pay - either the *industry not paying enough* (20%), *employers paying above the industry rate* (19%), *workers not moving between jobs* (17%) and *employers giving their staff perks to stay* (15%).

8.1 Changes in staff numbers

Table 80 shows current staff numbers by experience level as reported by business owners/managers. There were no differences between those business owners/managers who wanted their business to grow and those who wanted their business to remain about the same size or become smaller.

Table 80: Business owners/managers – Current worker numbers by level

Q6. Including yourself, what is the total number of paid staff working for this business, as of today?
Q7. Including yourself, what is the total number of paid staff working for this business, across all sites/branches in New Zealand, as of today?

	Entry level	Intermediate	Experienced	Advanced/expert
Base =	835*	835	835	835
	%	%	%	%
None	3	5	3	0
1	16	19	18	28
2-5	32	28	33	42
6-9	4	3	7	7
10-19	5	6	7	6
20-49	4	4	5	3
50-99	2	2	2	1
100+	30	31	21	11
Don't know	3	3	3	4
Total	100	100	100	100

Total may not sum to 100% due to rounding.
*Based on business owners/managers who employ staff.
Data is weighted, base number is the original number of interviews completed.

Although the current numbers of staff were the same, Table 81 overleaf shows that business owners/managers who wanted their business to grow stated they now have **more** staff at each experience level compared with the situation **12 months ago**. That is, they have already been in a growth mode.

For example, 30% said they have more staff at the **entry-level** than they did 12 months ago compared with 21% for those who plan to keep their business about the same size. This is also the case in relation to **intermediate** staff (16% said they have more staff at this level than they did 12 months compared with 13% who plan to keep their business the same size), **experienced** staff (15% said they have more staff at this level than they did 12 months compared with 11% who plan to keep their business the same size) and **advanced/expert** staff (12% said they have more staff at this level than they did 12 months compared with 9% who plan to keep their business the same size).

Table 81: Business owners/managers – Changes in worker numbers compared with 12 months ago by business plans

Q8. Compared to the situation 12 months ago, is the current number of paid staff that are in each group less, more or the same?
Q23. Which one of the following best describes this business's plans for the next 12 months? Does the business want to... grow, etc.

Base =	Business owners/ managers 835* %	Plan to grow 281 %	Plan to stay the same 419 %	Plan to become smaller 106 %
Entry-level				
More	23	30	21	12
Same	61	54	66	60
Less	12	12	9	23
Don't know	4	3	3	5
Intermediate				
More	13	16	13	7
Same	72	67	76	71
Less	11	13	8	18
Don't know	4	4	4	4
Experienced				
More	13	15	11	10
Same	70	68	73	66
Less	15	14	13	23
Don't know	3	3	3	2
Advanced/expert				
More	10	12	9	5
Same	77	75	80	73
Less	9	8	8	19
Don't know	4	5	3	3
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on business owners/managers who have plans for their business to grow or stay about the same size.
Data is weighted, base number is the original number of interviews completed.

Table 82 shows the extent to which business owners/managers wanted to employ **more** staff at each of the experience levels. Notwithstanding that some business owners/managers have more staff than they did 12 months ago (as reported earlier), 36% stated they now wanted **more entry-level** staff, 44% wanted more **intermediate** staff, 57% wanted more **experienced** staff, and 41% wanted more **advanced/expert** staff.

The table also shows that this is especially the case for business owners/managers who had plans for their business to grow compared with those planning to keep their business about the same size. For example, 77% stated they wanted more staff at the experienced level compared with 46% of those who were planning to keep their business about the same size.

Table 82: Business owners/managers – Extent to which more staff are required at each experience level by business plans

Q29. Thinking some more about your business in the next 12 months. What type of staff, if any, does your business need in order to ... grow, etc.

Q23. Which one of the following best describes this business's plans for the next 12 months?

	Business owners/ managers	Plan to grow	Plan to stay the same
Base =	863*	314	549
	%	%	%
Entry-level	36	56	26
Intermediate	44	63	33
Experienced	57	77	46
Advanced/expert	41	53	35
Total	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on business owners/managers who have plans for their business to grow or stay about the same size.
Data is weighted, base number is the original number of interviews completed.

8.2 Types of staff required

Business owners/managers who indicated they wanted more staff at one or more of the experience levels were asked what type of staff they were interested in recruiting. Table 83 highlights that, most frequently, these staff were *tradespeople*, with around one-half of both business owners/managers wanting their business to grow (59%) or stay about the same in size (49%) mentioning this.

Other frequently mentioned staff types included *supervisors and team leaders*, as well as *technical* people.

Also of interest in this table is the fact that a smaller percentage of business owners/managers wanting their business to grow (5%) stated they were 'not actively recruiting' compared with 21% of those who said they wanted their business to stay about the same size. That is, those wanting their business to grow were more likely to be actively recruiting when they completed the survey.

Table 83: Business owners/managers – Types of staff required by business plans

Q30. Thinking more specifically about the types of staff the business needs. Please complete the following table to tell us what type of staff it needs.
Q23. Which one of the following best describes this business's plans for the next 12 months?

	Business owners/ managers	Plan to grow	Plan to stay the same
Base =	648*	293	355
	%	%	%
Tradespeople (e.g., builders, plumbers)	54	59	49
Supervisors and Team Leaders	27	35	21
Technical people (e.g., architects, engineers)	27	33	22
Administrative staff	14	19	11
Managers	14	21	8
Other non-technical staff (e.g., drivers, delivery staff)	10	15	7
Other	4	5	2
Not recruiting at present	14	5	21
Don't know	1	0	1
Would rather not say	1	0	1
Total	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on business owners/managers who have plans for their business to grow or stay about the same size, and state they want more staff.
Data is weighted, base number is the original number of interviews completed.

Table 84 overleaf shows that there were significant differences in terms of the type of staff that business owners/managers are recruiting by industry category. For example, *tradespeople* were **more likely** to be required by those operating business in building installation/completion (72%) and residential building construction (59%). In comparison, *technical people* were **more likely** to be required by those involved in the architectural, engineering and technical services field (68%).

Table 84: Business owners/managers – Types of staff required by industry category

Q30. Thinking more specifically about the types of staff the business needs. Please complete the following table to tell us what type of staff it needs.
Q2. Which of the following best describes the industry this business mainly operates in?

	Business owners/ managers	Residential building	Heavy and civil engineering construction and Land development services	Building installation/ completion	Architectural, engineering, etc.
Base =	648*	200	56	150	62
	%	%	%	%	%
Tradespeople (e.g., builders, plumbers)	54	59	34	72	26
Supervisors and Team Leaders	27	28	44	24	16
Technical people (e.g., architects, engineers)	27	16	33	15	68
Administrative staff	14	16	16	9	19
Managers	14	12	34	11	11
Other non-technical staff (e.g., drivers, delivery staff)	10	8	23	7	8
Other	4	2	8	3	2
Not recruiting at present	14	16	7	16	13
Don't know	1	1	2	1	0
Would rather not say	1	2	2	0	0
Total	**	**	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on business owners/managers who have plans for their business to grow or stay about the same size, and state they want more staff.
Data is weighted, base number is the original number of interviews completed.

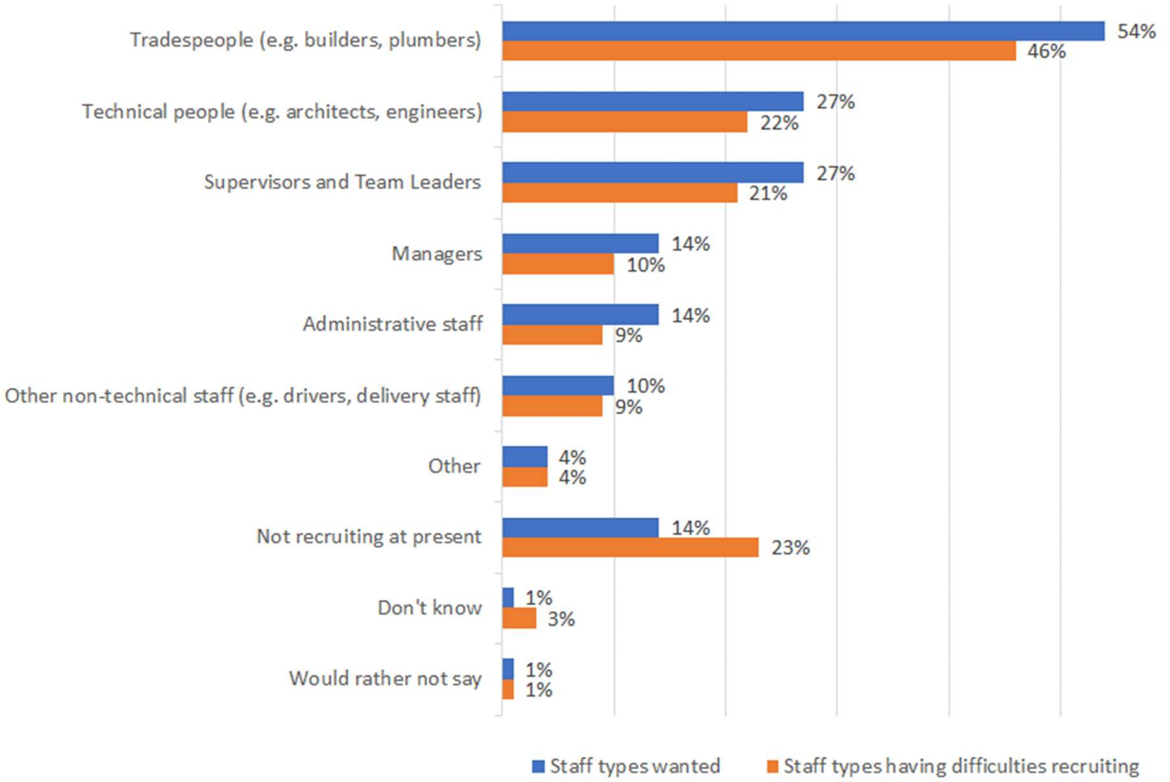
8.3 Recruitment difficulties

Business owners/managers who indicated they wanted more staff at one or more of the experience levels were also asked whether they were experiencing difficulties recruiting particular types of staff.

Figure 16 shows both the types of staff in terms of the extent to which they were required by business owners/managers (refer to the previous section of this report) and those that they were having difficulties recruiting. For example, it shows that *tradespeople*, required by 54% of business owners/managers, were also most frequently identified by 46% as the type of staff they were having difficulties recruiting. This indicates that business owners/managers wanting to recruit tradespeople were having difficulties recruiting them.

Similarly, *supervisors and team leaders* and *technical* people were also identified as the types of staff business owners/managers were having difficulties recruiting (21% were having difficulties recruiting *supervisors and team leaders* and 22% *technical people*).

Figure 16: Business owners/managers – Types of staff wanted and having difficulty recruiting (n=648)



Q31. And which of these types of staff is the business having difficulties recruiting, if any?
Q30. Thinking more specifically about the types of staff the business needs. Please complete the following table to tell us what type of staff it needs.

Also, of interest in Table 85 is the fact that all types of staff were identified more frequently as being difficult to recruit by business owners/managers wanting their business to grow. For example, 51% of these business owners/managers stated they were having difficulties recruiting *tradespeople* compared with 42% of those who said they wanted their business to stay about the same size.

Table 85: Business owners/managers – Types of staff having difficulties recruiting by business plans

Q31. And which of these types of staff is the business having difficulties recruiting, if any?
Q23. Which one of the following best describes this business's plans for the next 12 months?

	Business owners/ managers	Plan to grow	Plan to stay the same
Base =	648*	293	355
	%	%	%
Tradespeople (e.g., builders, plumbers)	46	51	42
Supervisors and Team Leaders	21	26	17
Technical people (e.g., architects, engineers)	22	28	17
Administrative staff	9	11	7
Managers	10	13	7
Other non-technical staff (e.g., drivers, delivery staff)	9	11	7
Other	4	6	2
Not recruiting at present	23	16	28
Don't know	3	1	4
Would rather not say	1	1	1
Total	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on business owners/managers who have plans for their business to grow or stay more or less the same size, and state they want more staff.
Data is weighted, base number is the original number of interviews completed.

Table 86 overleaf presents the same analysis by industry category and shows that *tradespeople* were most frequently identified as the type of staff that business owners/managers involved in building installation/completion were having difficulties recruiting (62% compared with 31% of those involved in heavy and civil engineering).

On the other hand, *supervisors and team leaders* were most frequently identified as the type of staff that business owners/managers involved in heavy and civil engineering were having difficulties recruiting (28% compared with 19% of those involved in residential building construction).

Table 86: Business owners/managers – Types of staff having difficulties recruiting by industry category

Q31. And which of these types of staff is the business having difficulties recruiting, if any?
Q2. Which of the following best describes the industry this business mainly operates in?

	Business owners/ managers	Residential building	Heavy and civil engineering construction and Land development services	Building installation/ completion	Architectural, engineering, etc.
Base =	648*	200	56	150	62
	%	%	%	%	%
Tradespeople (e.g., builders, plumbers)	46	50	31	62	16
Supervisors and Team Leaders	21	19	28	22	10
Technical people (e.g., architects, engineers)	22	11	31	14	50
Administrative staff	9	7	4	9	13
Managers	10	4	26	8	10
Other non-technical staff (e.g., drivers, delivery staff)	9	4	17	5	10
Other	4	4	10	2	0
Not recruiting at present	23	24	13	25	27
Don't know	3	6	6	2	0
Would rather not say	1	2	3	0	0
Total	**	**	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on business owners/managers who have plans for their business to grow or stay more or less the same size, and state they want more staff.
Data is weighted, base number is the original number of interviews completed.

8.4 Reasons for recruitment difficulties

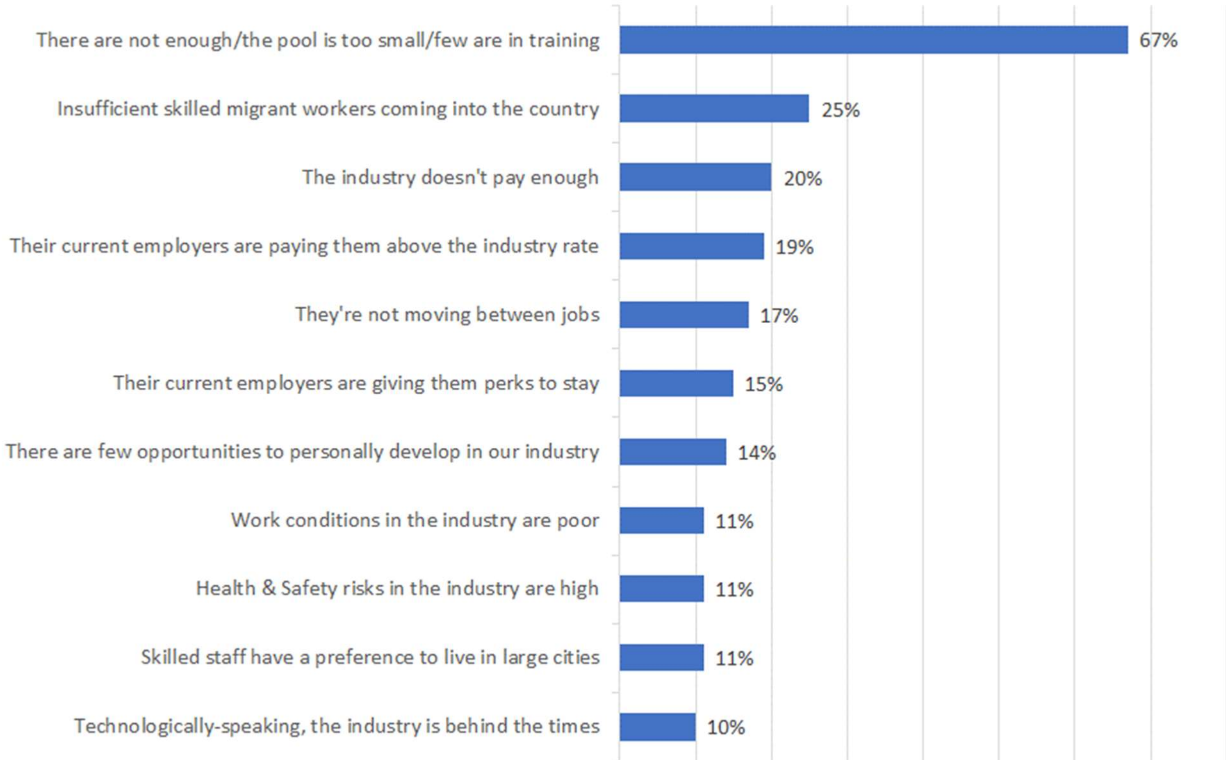
Business owners/managers wanting more staff, but having difficulties recruiting them, were asked why they thought they were having these difficulties. Figure 17 shows that, most frequently, they stated that *there are not enough (staff)* to meet demand (67%).

Also, other reasons related to pay - either *the industry not paying enough* (20%), *employers paying above the industry rate* (19%), *workers not moving between jobs* (17%) and *employers giving their staff perks to stay* (15%).

These results should be considered in the light of the information presented in Section 3.7, in which we outlined business owners'/managers' reaction to the current operating conditions and specifically that 53% had offered their staff pay increases.

Also, they should be considered in the light of the information presented in Section 7.2.3, in which we outlined workers' future expectations and specifically that 37% expected their pay to increase in the next 12 months.

Figure 17: Business owners/managers – Reasons for having recruitment difficulties (n=466)



Q32. Which of the following are reasons why this business is having difficulties recruiting skilled staff?

9.0 Future building trends, capacities and capabilities

In Section 6.1, we reported on business owners'/managers' and workers' opinions about various aspects of the building and construction sector. One of these aspects is related to the sector's 'readiness to adopt new trends in building design and construction'.

Based on the percentage of business owners/managers giving this aspect a rating of 6 or 7 on the 7-point scale measuring agreement, 18% of business owners/managers agreed that the sector readily adopts new trends and 15% disagreed. Workers provided somewhat similar results, 21% agreed and 13% disagreed.

Against this background, we examined in greater detail, the three 'actor' groups in relation to these new trends; for example, buildings which are 'greener' or more energy efficient, buildings which take account of climate change, accessible buildings, etc.

Key results

- Business owners/managers reported relatively modest levels of enquiry about the new design and construction trends, with the highest enquiry rates for: *Medium to high-density housing* (19%), *buildings with smaller floor areas* (18%) and *buildings which are 'greener'* (17%).

  With the enquiry rates in the 13-19% range, twice as many or more business owners/managers stated they were **not** receiving any enquiries in relation to these trends.

- In terms of capability, twice the percentage of business owners/managers stated they were capable as said they were **not** capable with respect to the new design and construction trends. The highest capability rates were recorded for: *Buildings with smaller floor areas* (47%) and *buildings with larger floor areas* (42%).

  However, some capability rates were relatively low. For example, only 25% of business owners/managers stated they were capable in relation to *buildings which take account of climate change*.

- In contrast, workers' interest in developing their personal capability was highest for: *Buildings which are 'green'* (34%) and those that *take account of climate change* (31%) and accessibility issues (28%). However, the trend business owners/managers were receiving the most interest from consumers (viz. *medium and high-density housing*), recorded one of the lowest levels of interest amongst workers (21%).

- As was the case for business owners/managers, in general, twice the percentage of workers stated they were capable in relation to each trend as said they are **not** capable. However, the capability rates were relatively low; between 22% and 27% for all trends.

- As an indication of end-users' adoption of new design and construction trends, recent home builders and renovators, delayers and planners were asked about their new builds' or renovations' features. The response from end-users building shows a focus on energy efficiency, with *energy efficient appliances*, *smart heating systems* and *solar panels* being the three features most frequently mentioned.

  Similarly, for those involved in major renovations, the results point towards a focus on improved insulation, particularly in terms of *double-glazed windows*, and *insulating roof and wall cavities.* In both cases, the main 'drivers' were: to have *healthier homes* and *reduce future (energy) operating costs.*

9.1 Adoption of new trends by business owners/managers

9.1.1 Receiving enquiries

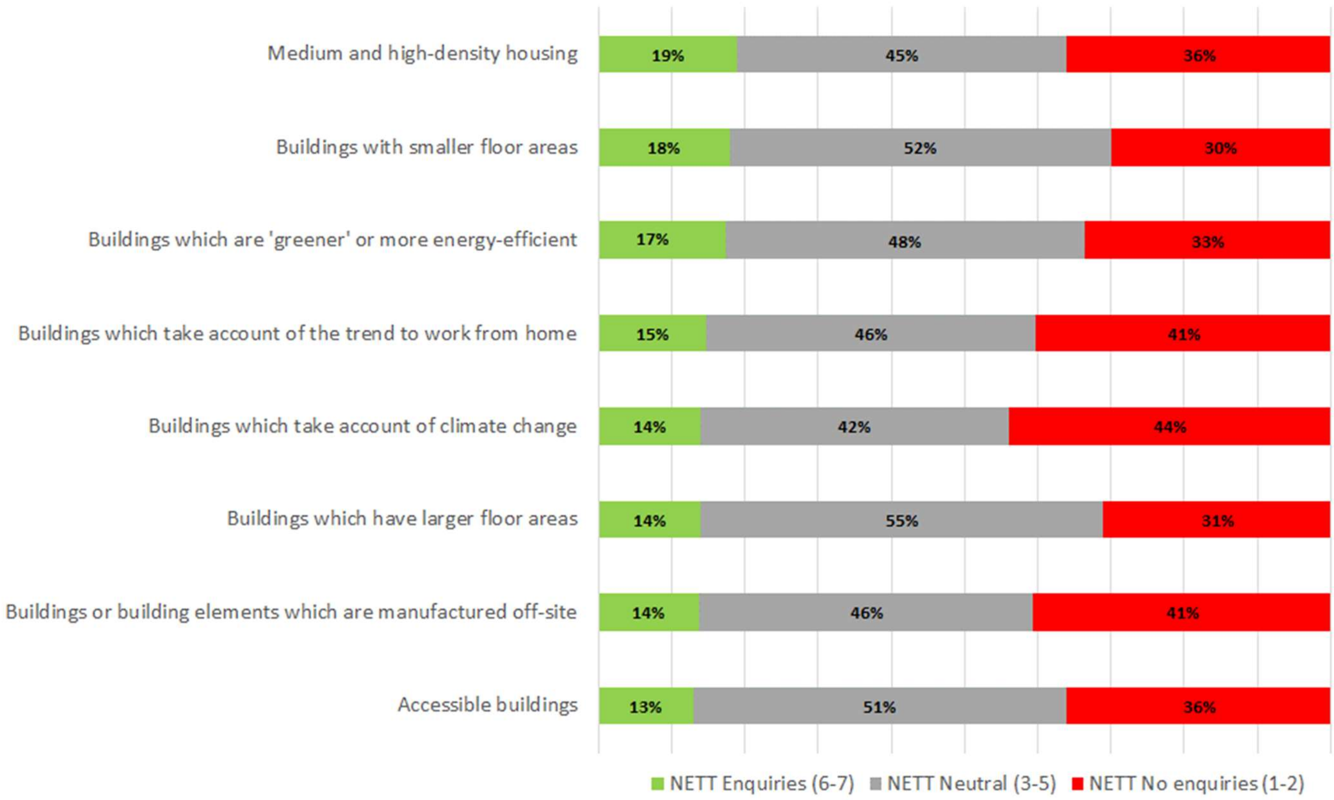
Business owners/managers were presented with a list of new design and construction trends and were asked: first, to establish the extent to which they were **receiving enquiries** about them; and second, to determine how they rated their **current capability** in relation to them.

Figure 18 overleaf presents the results based on the percentage who stated they were regularly **receiving enquiries** from consumers (by giving a rating of 6 or 7 on the 7-point scale measuring the rate of enquiries) compared with the percentage saying they are not receiving any enquiries (by giving a rating of 1 or 2).

This shows relatively modest levels of enquiry, with the highest enquiry rates for: *Medium to high-density housing* (19%), *buildings with smaller floor areas* (18%) and *buildings which are 'greener'* (17%).

With the enquiry rates in the 14-19% range, twice as many or more business owners/managers stated they were **not** receiving any enquiries in relation to these trends. For example, 19% of business owners/managers said they were receiving enquiries about *medium and high-density housing*, while 36% said they were not.

Figure 18: Business owners/managers – Consumer enquiries about new trends (n=1,029)



Q33. To what extent would you say this business is currently receiving enquiries or requests by customers to design or build in a way that relates to each of the following?

Table 87 overleaf shows the enquiry rates based on business owners'/managers' future business plans. This shows business owners/managers with plans to grow their business significantly **more likely** to state they were receiving enquiries. For example, almost twice as many of these business owners/managers said they were receiving enquiries from customers about *medium and high-density housing* (26%) compared with those that said they planned to keep their business at more or less the same size (15%).

Table 87: Business owners/managers – Consumer enquiries about new trends by future business plans

Q33. To what extent would you say this business is currently receiving enquiries or requests by customers to design or build in a way that relates to each of the following?
Q23. Which one of the following best describes this business's plans for the next 12 months?

	Business owners/ managers Enquiries (6-7)	Plan to grow	Plan to stay the same	Plan to grow smaller
Base =	835*	265*	461*	82*
	%	%	%	%
Medium and high-density housing	19	26	15	18
Buildings with smaller floor areas	18	22	15	15
Buildings which are 'greener' or more energy-efficient (e.g., highly insulated buildings, buildings with solar panels, etc.)	17	26	15	11
Buildings which take account of the trend to work from home	15	19	11	20
Buildings which take account of climate change (e.g., zero emission buildings or passive homes)	14	23	10	9
Buildings which have larger floor areas	14	17	13	14
Buildings or building elements which are manufactured off-site (fully or partially)	14	19	11	15
Accessible buildings (i.e., buildings that are suitable for people with all levels of capability, including older people)	13	20	10	15
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of business owners/managers rating the extent to which they are receiving enquiries with a 6 or 7 on the 7-point scale, indicating a positive level of enquiry.
^Don't knows excluded.
Data is weighted, base number is the original number of interviews completed.

Table 88 overleaf shows the enquiry results by industry category. Interestingly, this shows relatively low enquiry rates for business owners/managers involved in residential building construction, as well as those involved in the architectural, engineering and technical services field.

Table 88: Business owners/managers – Customer enquiries about new trends by industry category

Q33. To what extent would you say this business is currently receiving enquiries or requests by customers to design or build in a way that relates to each of the following?
Q2. Which of the following best describes the industry this business mainly operates in?

	Business owners/ managers Enquiries (6-7)	Residential building	Heavy and civil engineering construction and Land development services	Building installation/ completion	Architectural, engineering, etc.
Base =	871*	305*	64*	195*	91*
	%	%	%	%	%
Medium and high-density housing	19	22	28	12	20
Buildings with smaller floor areas	18	15	25	19	18
Buildings which are ‘greener’ or more energy-efficient (e.g., highly insulated buildings, buildings with solar panels, etc.)	17	18	27	17	15
Buildings which take account of the trend to work from home	15	11	22	12	13
Buildings which take account of climate change (e.g., zero emission buildings or passive homes)	14	14	24	10	18
Buildings which have larger floor areas	14	13	20	15	10
Buildings or building elements which are manufactured off-site (fully or partially)	14	22	28	12	20
Accessible buildings (i.e., buildings that are suitable for people with all levels of capability, including older people)	13	16	24	10	16
Total	**	**	**	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of business owners/managers rating the extent to which they are receiving enquiries with a 6 or 7 on the 7-point scale, indicating a positive level of enquiry.
^Don’t knows excluded.
Data is weighted, base number is the original number of interviews completed.

9.1.2 Capability

Table 89 presents the results for the new design and construction trends based on the percentage of business owners/managers stating they were relatively **capable** in relation to each trend (by giving a rating of 6 or 7 on the 7-point scale measuring capability) compared with the percentage saying they were not capable (by giving a rating of 1 or 2).

In general, this shows that, twice the percentage of business owners/managers stated they were capable as said they were **not** capable. The highest capability rates were recorded for: *Buildings with smaller floor areas* (47%) and *buildings with larger floor areas* (42%).

Also, about twice as many said they were capable in relation to *medium and high-density housing* (32%) as said they were not (19%) – the trend they are receiving the most enquiries about.

However, some capability rates were relatively low. For example, only 25% of business owners/managers stated they were capable in relation to *buildings which take account of climate change*.

Table 89: Business owners/managers – Current capability about new trends

Q34. To what extent does this business currently have the capability to assist customers who make these enquiries and requests? By this, we mean it has the knowledge, experience, processes, workforce and resources.

Base =	Business owners/ managers Capable (6-7) 844* %	Business owners/ managers Not capable (1-2) 844^ %
Medium and high-density housing	32	19
Buildings with smaller floor areas	47	12
Buildings which are 'greener' or more energy-efficient (e.g., highly insulated buildings, buildings with solar panels, etc.)	31	18
Buildings which take account of the trend to work from home	37	18
Buildings which take account of climate change (e.g., zero emission buildings or passive homes)	25	24
Buildings which have larger floor areas	42	14
Buildings or building elements which are manufactured off-site (fully or partially)	28	24
Accessible buildings (i.e., buildings that are suitable for people with all levels of capability, including older people)	38	14
Total	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of business owners/managers rating the extent to which their business is currently capable with a 6 or 7 on the 7-point scale, indicating a positive level of capability.
^Percentages reflect the percentage of business owners/managers rating the extent to which their business is currently capable with a 1 or 2 on the 7-point scale, indicating a negative level of capability.
Data is weighted, base number is the original number of interviews completed.

Table 90 shows the capability rates by business owners'/managers' future business plans for their business.

As with the enquiry rates for business owners/managers, this shows those with plans to grow their business were significantly **more likely** to state they had capability in relation to every trend. For example, 53% of these business owners/managers stated they had capability in relation to *buildings with smaller floor areas* compared with those that said they planned to keep their business at more or less the same size (45%).

Similarly, business owners/managers planning to grow their business were **more likely** to state they had capability in relation to *medium and high-density building* compared with those who said they planned to keep their business at more or less the same size (41% and 30% respectively).

Table 90: Business owners/managers – Current capability about new trends by future business plans

Q34. To what extent does this business currently have the capability to assist customers who make these enquiries and requests? By this, we mean it has the knowledge, experience, processes, workforce and resources.
Q23. Which one of the following best describes this business's plans for the next 12 months?

	Business owners/ managers Capable (6-7)	Plan to grow	Plan to stay the same	Plan to grow smaller
Base =	844*	271*	464*	82*
	%	%	%	%
Medium and high-density housing	32	41	30	26
Buildings with smaller floor areas	47	53	45	39
Buildings which are 'greener' or more energy-efficient (e.g., highly insulated buildings, buildings with solar panels, etc.)	31	43	27	23
Buildings which take account of the trend to work from home	37	41	37	30
Buildings which take account of climate change (e.g., zero emission buildings or passive homes)	25	39	20	21
Buildings which have larger floor areas	42	49	43	30
Buildings or building elements which are manufactured off-site (fully or partially)	28	35	27	15
Accessible buildings (i.e., buildings that are suitable for people with all levels of capability, including older people)	38	44	37	22
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of business owners/managers rating the extent to which their business is currently capable with a 6 or 7 on the 7-point scale, indicating a positive level of capability.
^Don't knows excluded.
Data is weighted, base number is the original number of interviews completed.

Table 91 shows the enquiry rates by industry category. In general, this shows relatively capability rates for business owners/managers involved in residential building construction. For example, this was especially the case in relation to *buildings with smaller floor areas* (53%). Note that the result for those involved in the architectural, engineering and technical services field for *medium and high-density building* (the trend identified as receiving the most consumer enquiries) was relatively low at 28%.

Table 91: Business owners/managers – Current capability about new trends by industry category

Q34. To what extent does this business currently have the capability to assist customers who make these enquiries and requests? By this, we mean it has the knowledge, experience, processes, workforce and resources.
Q2. Which of the following best describes the industry this business mainly operates in?

Base =	Business owners/ managers Capable (6-7) 881*	Residential building 313*	Heavy and civil engineering construction and Land development services 62*	Building installation/completion 200*	Architectural, engineering, etc. 92*
	%	%	%	%	%
Medium and high-density housing	32	36	40	29	28
Buildings with smaller floor areas	47	53	35	47	45
Buildings which are 'greener' or more energy-efficient (e.g., highly insulated buildings, buildings with solar panels, etc.)	31	34	30	30	32
Buildings which take account of the trend to work from home	37	44	33	32	36
Buildings which take account of climate change (e.g., zero emission buildings or passive homes)	25	28	30	25	22
Buildings which have larger floor areas	42	49	42	37	44
Buildings or building elements which are manufactured off-site (fully or partially)	28	30	29	27	27
Accessible buildings (i.e., buildings that are suitable for people with all levels of capability, including older people)	38	44	33	34	37
Total	**	**	**	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of business owners/managers rating the extent to which their business is currently capable with a 6 or 7 on the 7-point scale, indicating a positive level of capability.
^Don't knows excluded.
Data is weighted, base number is the original number of interviews completed.

9.2 Adoption of new trends by workers

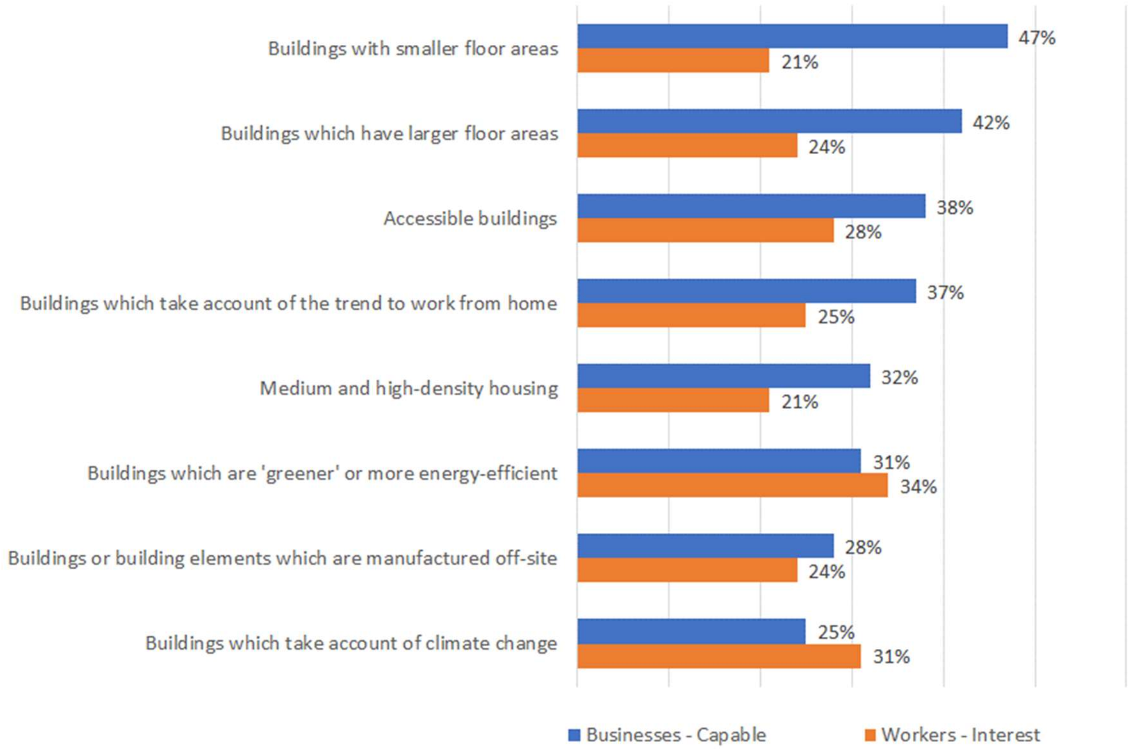
Workers were presented with the same list of new design and construction trends and asked two slightly different questions. The first to establish their **interest in developing their personal capability** in relation to each trend, and the second, to determine how they rated their **current capability** in terms of each trend.

9.2.1 Interest in developing personal capability

Figure 19 below and Table 92 overleaf present the results based on the percentage of workers who stated they had an interest in **developing their personal capability** in relation to each trend (by giving a rating of 6 or 7 on the 7-point scale measuring interest) compared with the percentage who said they had no interest (by giving a rating of 1 or 2).

The trends are presented in the **same order** as business owners/managers who stated they were receiving enquiries from consumers.

Figure 19: Workers – Interest in developing personal capability in relation to new trends (Business managers/owners: n=1,029; Workers: n=784)



Q34. To what extent does this business currently have the capability to assist customers who make these enquiries and requests? By this, we mean it has the knowledge, experience, processes, workforce and resources.
Q24. To what extent are you interested in developing your skills and expertise in each of the following.

Interest in developing personal capability was highest for: *Buildings which are 'green'* (34%) and those that take *account of climate change* (31%) and *accessibility issues* (28%).

Therefore, to a certain extent, workers' interests align with those of consumer enquiries. However, the trend business owners/managers were receiving the most interest from consumers (viz. *medium and high-density housing*), recorded one of the lowest levels of interest amongst workers (21%). In fact, 26% of workers categorically stated they were not interested in developing their personal capability in this trend.

Table 92: Workers – Interest in developing personal capability in relation to new trends

Q24. To what extent are you interested in developing your skills and expertise in each of the following?

Base =	Workers Interest (6-7) 784* %	Workers No interest (1-2) 784^ %
Medium and high-density housing	21	26
Buildings with smaller floor areas	21	23
Buildings which are 'greener' or more energy-efficient (e.g., highly insulated buildings, buildings with solar panels, etc.)	34	13
Buildings which take account of the trend to work from home	25	21
Buildings which take account of climate change (e.g., zero emission buildings or passive homes)	31	15
Buildings which have larger floor areas	24	17
Buildings or building elements which are manufactured off-site (fully or partially)	24	18
Accessible buildings (i.e., buildings that are suitable for people with all levels of capability, including older people)	28	14
Total	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of workers rating their interest in developing their personal capability with a 6 or 7 on the 7-point scale, indicating a positive level of interest.
^Percentages reflect the percentage of workers rating their interest in developing their personal capability with a 1 or 2 on the 7-point scale, indicating a negative level of interest.
Data is weighted, base number is the original number of interviews completed.

Table 93 overleaf shows the workers' level of interest in developing their personal capability in each trend by their level of experience. A comparison of the results for workers who considered themselves to be new to the sector (i.e., at an **entry-level**) and those operating at an **advanced/expert** level, points to the fact that the former group of workers was more interested than the latter group.

For example, 27% of entry-level workers stated they wanted to develop their personal capability in terms of *buildings which are 'greener'* compared with 20% of those operating at an advanced/expert level. Similarly, they showed a greater interest in developing their skills in terms of buildings which took *account of climate change* (37% compared with 30% of those operating at an advanced/expert level).

In comparison, there was little difference by experience level in terms of workers' interest in developing their personal capability in relation to *medium and high-density housing.*

Table 93: Workers – Interest in developing personal capability in relation to new trends by experience level

Q24. To what extent are you interested in developing your skills and expertise in each of the following?

Q3. Which one of the following best describes you?

	Workers Interest (6-7)	Entry-level	Inter-mediate	Experienced	Advance/ expert
Base =	784*	69	123	236	320
	%	%	%	%	%
Medium and high-density housing	21	22	22	24	19
Buildings with smaller floor areas	21	29	32	22	16
Buildings which are 'greener' or more energy-efficient (e.g., highly insulated buildings, buildings with solar panels, etc.)	34	27	19	25	20
Buildings which take account of the trend to work from home	25	20	28	31	20
Buildings which take account of climate change (e.g., zero emission buildings or passive homes)	31	37	36	32	30
Buildings which have larger floor areas	24	28	29	25	21
Buildings or building elements which are manufactured off-site (fully or partially)	24	21	25	27	23
Accessible buildings (i.e., buildings that are suitable for people with all levels of capability, including older people)	28	34	31	30	27
Total	**	**	**	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of workers rating their interest in developing their personal capability with a 6 or 7 on the 7-point scale, indicating a positive level of interest.
Data is weighted, base number is the original number of interviews completed.

Table 94 overleaf shows the results by industry category. Except for an interest in developing their personal capability in relation to *buildings with larger floor areas*, workers involved in the architectural, engineering and technical services field were **more likely** to show an interest in developing their skills in relation to all trends compared with workers in all other industry categories.

This includes *medium and high-density housing* (27% compared with 20% of workers involved in residential building construction); the trend business owners/managers identified as the one they were getting the most consumer enquiries about.

Despite residential building construction workers' lower interest in *medium and high-density housing*, workers involved in this industry category showed a relatively higher level of interest in relation to *buildings which are 'greener'* (44% compared with 27% of those involved in building installation/completion).

Similarly, they showed a higher level of interest in relation to *buildings which take account of climate change* (34% and 26% respectively).

Table 94: Workers – Interest in developing personal capability in relation to new trends by industry category

Q24. To what extent are you interested in developing your skills and expertise in each of the following?
Q1. Which one of the following best describes the industry the business you work for mainly operates in?

	Workers (6-7)	Residential building	Heavy and civil engineering construction and Land development services	Building installation/ completion	Architectural, engineering, etc.
Base =	784*	201	93	162	133
	%	%	%	%	%
Medium and high-density housing	21	20	15	22	27
Buildings with smaller floor areas	21	26	18	14	29
Buildings which are 'greener' or more energy-efficient (e.g., highly insulated buildings, buildings with solar panels, etc.)	34	44	23	27	47
Buildings which take account of the trend to work from home	25	22	22	25	38
Buildings which take account of climate change (e.g., zero emission buildings or passive homes)	31	34	27	26	41
Buildings which have larger floor areas	24	29	24	25	20
Buildings or building elements which are manufactured off-site (fully or partially)	24	22	24	21	30
Accessible buildings (i.e., buildings that are suitable for people with all levels of capability, including older people)	28	30	23	29	35
Total	**	**	**	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of workers rating their interest in developing their personal capability with a 6 or 7 on the 7-point scale, indicating a positive level of interest.
Data is weighted, base number is the original number of interviews completed.

9.2.2 Current capability

Table 95 presents the results for the new design and construction trends based on the percentage of workers stating they were relatively **capable** in relation to each trend (by giving a rating of 6 or 7 on the 7-point scale measuring capability) compared with the percentage saying they are not capable (by giving a rating of 1 or 2).

As was the case for business owners/managers, this shows that, in general, twice the percentage of workers stated they were capable in relation to each trend as said they are **not** capable.

However, the capability rates were relatively low; between 22% and 27% for all trends.

Table 95: Workers – Current capability in new trends

Q25. And thinking of your skills and expertise as of today, how confident would you say you are in each of these areas?

	Workers Capable (6-7)	Workers Not capable (1-2)
Base =	784*	784^
	%	%
Medium and high-density housing	22	13
Buildings with smaller floor areas	27	11
Buildings which are 'greener' or more energy-efficient (e.g., highly insulated buildings, buildings with solar panels, etc.)	23	10
Buildings which take account of the trend to work from home	25	12
Buildings which take account of climate change (e.g., zero emission buildings or passive homes)	24	13
Buildings which have larger floor areas	26	9
Buildings or building elements which are manufactured off-site (fully or partially)	23	11
Accessible buildings (i.e., buildings that are suitable for people with all levels of capability, including older people)	24	10
Total	**	**

Total may exceed 100% because of multiple responses.

*Percentages reflect the percentage of workers rating their current capability with a 6 or 7 on the 7-point scale, indicating a high level of capability.

^Percentages reflect the percentage of workers rating their current capability with a 1 or 2 on the 7-point scale, indicating a low level of capability.

Data is weighted, base number is the original number of interviews completed.

Table 96 shows the worker capability rates by experience level. In general, the more experienced the worker the better the capability rates. For example, this is the case for: *Buildings with larger floor areas* (31% for workers operating at an advanced/expert level compared with 17% for entry-level workers) and in relation to *medium and high-density housing* (25% and 14% respectively).

However, there were exceptions. For example, similar percentages of entry-level workers and those operating at an advanced level stated they were capable with respect to *buildings with smaller floor areas* (29% and 27% respectively).

Table 96: Workers – Current capability in new trends by experience

Q25. And thinking of your skills and expertise as of today, how confident would you say you are in each of these areas?
Q3. Which one of the following best describes you?

	Workers Capable (6-7)*	Entry-level	Intermediate	Experienced	Advanced/ expert
Base =	784	69	123	236	320
	%	%	%	%	%
Medium and high-density housing	22	14	23	21	25
Buildings with smaller floor areas	27	29	25	28	27
Buildings which are 'greener' or more energy-efficient (e.g., highly insulated buildings, buildings with solar panels, etc.)	23	16	20	21	27
Buildings which take account of the trend to work from home	25	17	30	26	24
Buildings which take account of climate change (e.g., zero emission buildings or passive homes)	24	21	20	24	26
Buildings which have larger floor areas	26	17	25	27	31
Buildings or building elements which are manufactured off-site (fully or partially)	23	13	19	23	26
Accessible buildings (i.e., buildings that are suitable for people with all levels of capability, including older people)	24	15	15	25	30
Total	**	**	**	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of workers rating their current capability with a 6 or 7 on the 7-point scale, indicating a high level of capability.
Data is weighted, base number is the original number of interviews completed.

Table 97 overleaf shows the worker capability rates by industry category. As is the case for business owners/managers, workers involved in residential building construction were more likely to state they were capable in relation to many of the trends compared with workers in other categories. For example, 38% said they were capable in terms of *buildings with smaller floor areas* compared with 26% for those involved in the architectural, engineering and technical services field. In fact, workers involved in the architectural, engineering and technical services field recorded results which reflected the average rate for all workers.

Table 97: Workers – Current capability in new trends by industry category

Q25. And thinking of your skills and expertise as of today, how confident would you say you are in each of these areas?
Q1. Which one of the following best describes the industry the business you work for mainly operates in?

	Workers (6-7)	Residential building	Heavy and civil engineering construction and Land development services	Building installation/ completion	Architectural, engineering, etc.
Base =	784*	201	93	162	133
	%	%	%	%	%
Medium and high-density housing	22	26	19	23	21
Buildings with smaller floor areas	27	38	21	28	26
Buildings which are 'greener' or more energy-efficient (e.g., highly insulated buildings, buildings with solar panels, etc.)	23	27	19	22	22
Buildings which take account of the trend to work from home	25	22	27	23	25
Buildings which take account of climate change (e.g., zero emission buildings or passive homes)	24	23	23	26	18
Buildings which have larger floor areas	26	27	24	31	28
Buildings or building elements which are manufactured off-site (fully or partially)	23	21	25	26	17
Accessible buildings (i.e., buildings that are suitable for people with all levels of capability, including older people)	24	30	17	25	29
Total	**	**	**	**	**

Total may exceed 100% because of multiple responses.
*Percentages reflect the percentage of workers rating their current capability with a 6 or 7 on the 7-point scale, indicating a high level of capability.
Data is weighted, base number is the original number of interviews completed.

9.3 Adoption of new trends by end-users

As an indication of end-users' adoption of new design and construction trends, and particularly the trend towards 'greener' homes, recent home builders and renovators, delayers and planners were asked about their new builds' or renovations' features.

Table 98 shows the response to this question, for those **building new**. This shows a focus on **energy efficiency** especially, with *energy efficient appliances*, *smart heating systems* and *solar panels* being the three features most frequently mentioned.

Table 98: End-user – Features of new builds

Q15. Which of the following does/will ... [the house/townhouse/apartment/unit] have, if any? [Recent Home Builders & Renovators]
Q41. Which of the following will ... [the new house/townhouse/apartment] have, if any? [Delayers]
Q61. Which of the following will ... [the new house/townhouse/apartment] have, if any? [Planners]

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	131	71*	31**	29^
	%	%	%	%
Energy efficient appliances	52	49	55	55
Smart heating system	48	46	58	41
Solar panels	47	27	55	34
Triple glazed windows	38	27	26	24
Smart appliance control system	33	28	42	34
Smart rainwater collection system	23	24	29	14
Smart or automatic window blinds	18	17	23	14
Smart irrigation system	11	7	19	14
None of the above	12	17	6	17
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on end-users who commenced/completed building a new house/townhouse/apartment/unit in the last 12 months.
**Sub-sample based on end-users who delayed building a new house/townhouse/apartment/unit in the last 12 months.
^Sub-sample based on end-users who are planning to commence building a new house/townhouse/apartment/unit in the next 12 months.

Table 99 overleaf shows the results for those who have commenced/completed, delayed or planned to commence **major renovations**. Overall, the results point towards a focus on **improved insulation**, particularly in terms of: *Double-glazed windows* and *insulating roof and wall cavities*.

Table 99: End-user – Features of major renovations

Q16. Which of the following does/will the ... [house/townhouse/apartment/unit] have as a result of the renovation, if any? [Recent Home Builders & Renovators]
Q42. Which of the following will your [house/townhouse/apartment] have as a result of the renovation, if any? [Delayers]
Q62. Which of the following will your [house/townhouse/apartment] have as a result of the renovation, if any? [Planners]

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	119	76*	85**	35^
	%	%	%	%
Double glazed windows	50	38	20	37
Insulation in the roof cavity	44	39	15	26
Insulation in the walls	42	39	11	31
Insulation under the floor	32	26	12	23
New or improved heating system	30	24	11	26
New or improved ventilation system	30	20	12	31
Draught stopping for existing doors and windows	26	25	7	17
Energy efficient appliances	26	18	12	20
Smart or automatic window blinds	20	5	8	3
Solar panels	18	16	8	6
Smart appliance control system	14	20	1	3
Smart water collection system	13	7	12	3
Smart irrigation system	12	8	8	3
None of the above	57	18	48	37
Total	**	**	**	37

Total may exceed 100% because of multiple responses.
*Sub-sample based on end-users who commenced/completed a major renovation in the last 12 months.
**Sub-sample based on end-users who delayed a major renovation in the last 12 months.
^Sub-sample based on end-users who are planning to commence a major renovation in the next 12 months.

When end-users were asked why their new builds and major renovations have/will have these features, all three groups typically identified the main 'drivers' as to have *healthier homes* and *reduce future (energy) operating costs* (Table 100 overleaf).

All other reasons were mentioned by reasonably significant percentages of end-users as well, including to meet *Healthy Homes legal regulations* (e.g., 43% of recent home builders and renovators). This may reflect the relatively large percentage of recent home builders and renovators who had built/were building new, but were not planning to be owner-occupiers (refer to Section 2.3).

Table 100: End-user – Reasons for features of new builds and major renovations

Q17. Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why your [house/townhouse/apartment] will have these features? [Recent Home Builders & Renovators]
Q43. Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why you'd like your [house/townhouse/apartment] to have these features? [Delayers]
Q63. Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why you'd like your [house/townhouse/apartment] to have these features? [Planners]

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	240	121*	73**	46^
	%	%	%	%
To have a healthier home (e.g., warmer in Winter, so we get fewer colds)	64	64	63	68
To reduce future costs in terms of operating the home	61	62	62	57
To meet Building Code requirements	50	51	48	50
To increase re-sale value or rental return	49	45	58	45
To be more environmentally-friendly	48	49	46	45
To meet Healthy Homes legal requirements	44	43	47	44
To have a modern look/style	43	40	51	42
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on end-users who commenced/completed building a new house/townhouse/apartment/unit or a major renovation in the last 12 months and will have one of the features listed in Q16.
**Sub-sample based on end-users who delayed building a new house/townhouse/apartment/unit or a major renovation in the last 12 months and will have one of the features listed in Q42.
^Sub-sample based on end-users who are planning to commence building a new house/townhouse/apartment/unit or a major renovation in the next 12 months and will have one of the features listed in Q62.

Compared with end-users involved in a major renovation, significantly fewer end-users involved in a minor renovation stated their dwelling will have one of the listed features (Table 101 overleaf).

However, many frequently gave the same reasons as those with a new build or major renovation (Table 102 overleaf). Namely, to have *healthier homes* and *reduce future (energy) operating costs*.

Table 101: End-user – Features of minor renovations

Q17. Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why your [house/townhouse/apartment] will have these features? [Recent Home Builders & Renovators]
Q43. Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why you'd like your [house/townhouse/apartment] to have these features? [Delayers]
Q63. Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why you'd like your [house/townhouse/apartment] to have these features? [Planners]

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	673	302*	160**	211^
	%	%	%	%
New or improved heating system	14	17	10	13
Double glazed windows	14	16	8	16
Insulation in the walls	12	15	6	11
Insulation in the roof cavity	11	16	4	9
Energy efficient appliances	11	16	9	12
New or improved ventilation system	10	13	8	8
Insulation under the floor	10	12	5	10
Draught stopping for existing doors and windows	8	10	6	5
Solar panels	5	5	3	5
Smart appliance control system	4	5	2	3
Smart irrigation system	4	3	8	1
Smart or automatic window blinds	3	3	6	2
Smart water collection system	3	2	6	2
None of the above	49	43	56	54
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on end-users who commenced/completed a minor renovation in the last 12 months.
**Sub-sample based on end-users who delayed a minor renovation in the last 12 months.
^Sub-sample based on end-users who are planning to commence a minor renovation in the next 12 months.

Table 102: End-user – Reasons for features of minor renovations

Q17. Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why your [house/townhouse/apartment] will have these features? [Recent Home Builders & Renovators]
Q43. Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why you'd like your [house/townhouse/apartment] to have these features? [Delayers]
Q63. Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why you'd like your [house/townhouse/apartment] to have these features? [Planners]

	End-users	Recent home builders and renovators	Delayers	Planners
Base =	341	171*	70**	100^
	%	%	%	%
To have a healthier home (e.g., warmer in Winter, so we get fewer colds)	67	65	64	73
To be more environmentally friendly	37	36	27	45
To increase re-sale value or rental return	34	34	24	41
To reduce future costs in terms of operating the home	33	55	55	64
To meet Healthy Homes legal requirements	31	29	21	39
To have a modern look/style	30	29	29	32
To meet Building Code requirements	26	21	22	36
Total	**	**	**	**

Total may exceed 100% because of multiple responses.
*Sub-sample based on end-users who commenced/completed a minor renovation in the last 12 months and will have one of the features listed in Q16.
**Sub-sample based on end-users who delayed a minor renovation in the last 12 months and will have one of the features listed in Q42.
^Sub-sample based on end-users who are planning to commence a minor renovation in the next 12 months and will have one of the features listed in Q62.

Appendix A: The Building and Construction Sector – Industries in scope

Table 103: Industries in scope

Level	Sub-level
1. Residential building construction	House construction Other residential building construction
2. Non-residential building construction	
3. Heavy and civil engineering construction	Road and bridge construction Other heavy and civil engineering construction
4. Construction services – Land development	Land development & subdivision Site preparation services
5. Construction services – Building structural	Concreting services Bricklaying services Roofing services Structural steel erection services
6. Construction services – Building installation	Plumbing services Electrical services Air conditioning & heating services Fire & security alarm services Other building installation services
7. Construction services – Building completion	Plastering and ceiling services Carpentry services Tiling and carpeting services Painting and decorating services Glazing services
8. Other building construction services	Landscape construction services Hire of construction machinery & operator Other
9. Scientific research	
10. Architectural, engineering and technical services	Architectural services Surveying & mapping services Engineering design & engineering consultancy services Other specialised design services Scientific testing & analysis services
96. Other	

Appendix B: Survey questionnaires

MBIE – State of the Building & Construction Sector Survey - BUSINESSES

Research New Zealand #5273

DATE 28 March 2022 (Version 6) FINAL & APPROVED

Introduction

Thank you for taking the time to complete this **important research project** about the Building & Construction industry.

The survey is being completed on behalf of the Ministry of Business, Innovation & Employment (MBIE) to monitor the industry and identify the specific challenges and difficulties it is facing.

Completing the survey is **voluntary**. However, it should only take up to 15 minutes to complete, depending on your answers.

Be in to win

Everyone who completes the survey will go into a **draw to win one of three vouchers worth $500 each, that they can spend at Bunnings, Mitre 10 or Placemakers**. You can enter at the end of the survey.

You can start the survey **here**.

Confidentiality

All the information you provide is **confidential**. We will provide the results back to MBIE in the form of summary statistics and anonymised data.

You can read more about our privacy policy **here**.

Along the bottom of each screen:

If you have any questions about the survey, please go to our website www.researchnz.com or email Annita Wood of Research New Zealand at sobcs.survey@researchnz.com

QA Please provide your consent to complete this survey here.

1. ....I provide my consent
2. ....I do not provide my consent **Terminate**

Part A: About this business

Q1 Which of the following **best** describes you in terms of this business?

1. ....Business owner or partner
2. ....Manager/Senior staff member responsible for employment decisions (not an owner)
3. .....Self-employed with no employees
95 ...None of the above

Q2 Which of the following best describes the industry this business mainly operates in?

1. ....Residential building construction (e.g. house building)
2. ....Non-residential building construction
3. .....Heavy and civil engineering construction (e.g. road and bridge construction)
4. .....Construction services – Land development and site preparation services
5. .....Construction services – Building structural services (e.g. concreting and bricklaying)
6. .....Construction services – Building installation services (e.g. plumbing and electrical)
7. .....Construction services – Building completion services (e.g. plastering and painting)
8. .....Other building construction services (e.g. landscaping)
9. .....Scientific research services
10. ...Architectural, engineering and technical services
96 ...Other **Please specify**

Q2a And which one of the following best describes your work?

Question 2	Question 2a
1. Residential building construction	House construction Other residential building construction
2. Non-residential building construction	
3. Heavy and civil engineering construction	Road and bridge construction Other heavy and civil engineering construction
4. Construction services – Land development	Land development & subdivision Site preparation services
5. Construction services – Building structural	Concreting services Bricklaying services Roofing services Structural steel erection services
6. Construction services – Building installation	Plumbing services Electrical services Air conditioning & heating services Fire & security alarm services Other building installation services
7. Construction services – Building completion	Plastering and ceiling services Carpentry services Tiling and carpeting services Painting and decorating services Glazing services
8. Other building construction services	Landscape construction services Hire of construction machinery & operator Other
9. Scientific research	
10. Architectural, engineering and technical services	Architectural services Surveying & mapping services Engineering design & engineering consultancy services Other specialised design services Scientific testing & analysis services
96. Other	

Q3 About how many years has the business been in operation (in New Zealand)?

1 .....Less than 1 year
2 .....1 to less than 2 years
3 .....2 to less than 6 years
4 .....6 to less than 10 years
5 .....10 years or more
98 ...Don’t know
99 ...Would rather not say

Q4 In which part(s) of the country does the business mainly operate in? ***Note:*** *Please select as many as apply, If the business operates on a nationwide basis, please select the option at the end of the list.*

1 .....Northland
2 .....Auckland
3 .....Waikato
4 .....Bay of Plenty
5 .....Gisborne
6 .....Hawke's Bay
7 .....Taranaki
8 .....Manawatū
9 .....Whanganui
10 ...Wairarapa
11 ...Wellington
12 ...Tasman
13 ...Nelson
14 ...Marlborough
15 ...West Coast
16 ...Canterbury
17 ...Otago
18 ...Southland
19 ...All New Zealand
98 ...Don't know

Q5 Based on its ownership, philosophy and/or management practices, does this business consider itself to be …?

1 .....A Māori business
2 .....A Pasifika business
3 .....Neither
98 ...Don't know
99 ...Would rather not say

Q6 **If the business operates in only one region ask (ref. Q4):**

Including yourself, what is the total number of paid staff working for this business, **as of today**?

Q7 **If the business operates across two or more regions ask:**

Including yourself, what is the total number of paid staff working for this business, across all sites/branches in New Zealand, **as of today**?

Please write in a number for each of these groups. An estimate will do. If there is no staff at this level, select 'None'. Do not include contractors:

Entry level staff (A staff member with no prior experience - e.g. apprentices, new graduates)

1 .....Write in a number here:
2 .....None
98 ...Don't know

Intermediate level staff (A staff member who has some work experience, but still works under supervision)

1 .....Write in a number here:
2 .....None
98 ...Don't know

Experienced level staff (A staff member who has sufficient work experience to work independently)

1 .....Write in a number here:
2 .....None
98 ...Don't know

Advanced/Expert level staff (A staff member with extensive work experience, who works independently and is able to coach others)

1 .....Write in a number here:
2 .....None
98 ...Don't know

Q8 Please fill in this table. Compared to the situation 12 months ago, is the current number of paid staff that are in each group **less, more or the same**?

	Entry level	**Intermediate level**	**Experienced level**	**Advanced/Expert level**
More	1	1	1	1
The same	2	2	2	2
Less	3	3	3	3
Don't know	98	98	98	98

Q9 Please fill in this table. Which of these does this business **currently** do, to attract, retain and upskill staff ? *RDN*

	Entry level	**Intermediate level**	**Experienced level**	**Advanced/ Expert level**
a. Financially supports and makes time available for them to gain **further** qualifications	1	1	1	1
b. Pays them a **higher**-than-average industry wage/salary	2	2	2	2
c. Provides them with **equipment and tools** (e.g. mobile, laptop)	3	3	3	3
d. Helps them keep **up to date** with changes to the Building Code	4	4	4	4
e. Engages them in **resolving problems**	5	5	5	5
f. Trains them to be **innovative thinkers**	6	6	6	6
g. Gives them **extra** perks (e.g. extra paid leave, flexible start-finish times, extra annual leave, company car)	7	7	7	7
h. Gives them on the **job training** or other professional development opportunities	8	8	8	8
i. Helps them when they become **stressed**	9	9	9	9
j. Gives them the **option** to work remotely (e.g. from home)	10	10	10	10
None of the above	95	95	95	95

Part B: The last 12 months

The questions in this section are about the **last 12 months (i.e. year ending 31 March 2022)**.
Note: *Please remember this is a confidential survey and the results to this and following questions will only be reported in a summary form. This means that your individual answers will* ***not*** *be reported.*

Q10 Overall, to what extent would you say this business had a **financially** successful year?
1 .....Not at all successful
2 .....
3 .....
4 .....
5 .....
6 .....
7 .....Extremely successful
98 ...Don't know
99 ...Would rather not say

Q11 **If Q10=5-7 ask, else skip** What are the **main** reasons for this?
Note: *Please select all that apply.*
1 .....Customers wanted more work completed than projected
2 .....The business more efficiently completed its work
3 .....Costs were lower than expected
4 .....Margins were higher
5 .....The business has highly skilled staff
6 .....The business employed more skilled staff
7 .....Overall profitability was better than expected
96 ...Other **Specify**
98 ...Don't know
99 ...Would rather not say

Q12 **If Q10=1-4 ask, else skip** What are the **main** reasons for this?
Note: *Please select all that apply .*
1 .....Customers cancelled or delayed commencing planned work
2 .....The business wasn't as efficient as it could have been
3 .....Costs were higher than before
4 .....Margins were lower
5 .....The business didn't have enough skilled staff
6 .....Materials shortages and delays
7 .....The business missed deadlines
8 .....We had a lot of re-work due to faulty workmanship
9 .....We had a lot of re-work due to using substandard materials
10 ...Overall profitability was lower than expected
96 ...Other **Specify**
98 ...Don't know
99 ...Would rather not say

Q13 As a result of its financial performance this year, which of the following - if any - did the business do (at any stage during the year)? *Please select all that apply.*

1 .....Asked staff to work part-time
2 .....Asked staff to take unpaid leave
3 .....Asked staff to take accrued holiday leave
4 .....Applied a pay cut to some staff
5... Offered pay rise to some staff
6 .....Made some staff redundant
7 .....Hired new staff
8 .....Invested in new equipment/technology
9 .....Invested in a new/another business
10 ...Took on new partners/shareholders
11 ...Refinanced the business
95 ...None of the above
98 ...Don't know
99 ...Would rather not say

Q14 **If Q10=3-5 ask, else skip** Still thinking about this business's financial performance this year. How does this **compare** with its performance in the 12 months **before** the **COVID-19 pandemic** started with the lockdown at the end of March 2020 (i.e. the year ending 31 March 2020)?

1 .....Worse
2 .....About the same
3 .....Better
98 ...Don't know
99 ...Would rather not say

Q15 Still thinking about the **COVID-19 pandemic**. How, and by how much would you say this business has been impacted by the pandemic in the last 12 months, in terms of each of the following?

Please select one option for each statement. RDN.

	1 Negatively impacted	2	3	4 Not impacted	5	6	7 Positively impacted	97 NA	98 Don't know
a. Its ability to **manage costs**	❍	❍	❍	❍	❍	❍	❍	❍	❍
b. Its ability to **meet deadlines**	❍	❍	❍	❍	❍	❍	❍	❍	❍
c. The **availability** of specified materials	❍	❍	❍	❍	❍	❍	❍	❍	❍
d. Specified materials being delivered **on time**	❍	❍	❍	❍	❍	❍	❍	❍	❍
e. **Stress** levels amongst **workers**	❍	❍	❍	❍	❍	❍	❍	❍	❍
f. **Stress** levels amongst **business owners**	❍	❍	❍	❍	❍	❍	❍	❍	❍
g. Its ability to secure **new** work	❍	❍	❍	❍	❍	❍	❍	❍	❍

Q15a And still thinking about how this business has been impacted by the pandemic in the last 12 months. How, and by how much has it been impacted in terms of each of the following?
Please select one option for each statement. RDN.

	1 Negatively impacted	2	3	4 Not impacted	5	6	7 Positively impacted	97 NA	98 Don't know
h. Its ability to **forecast and plan** for the future	❍	❍	❍	❍	❍	❍	❍	❍	❍
i. The availability of **skilled** workers	❍	❍	❍	❍	❍	❍	❍	❍	❍
j. The fact that the borders have been **closed**	❍	❍	❍	❍	❍	❍	❍	❍	❍
k. **Lockdowns** and related disruptions	❍	❍	❍	❍	❍	❍	❍	❍	❍
l. **Remote** working of the **business's staff**	❍	❍	❍	❍	❍	❍	❍	❍	❍
m. **Remote** working of staff working in **other** businesses or other organisations the business is dependent on	❍	❍	❍	❍	❍	❍	❍	❍	❍

Q16 The building and construction sector has/is experiencing some challenging times. This is for a number of reasons, including the COVID-19 pandemic. This, in turn, has resulted in some work practices that would **not** normally be done.

Based on your own experience, how often – if at all – did the business do each of the following in the last 12 months? Remember this is a confidential survey.
Please select one option for each statement. RDN.

	1 Not at all	2	3	4	5	6	7 Many times	97 NA	98 Don't know
a. Workers were paid **less than** the minimum wage	❍	❍	❍	❍	❍	❍	❍	❍	❍
b. Workers were **unable** to take leave and/or meal/rest breaks	❍	❍	❍	❍	❍	❍	❍	❍	❍
c. Workers weren't given the health & safety training and equipment they needed to do their work safely	❍	❍	❍	❍	❍	❍	❍	❍	❍
d. Workers were asked to work **more** than the hours they are paid for	❍	❍	❍	❍	❍	❍	❍	❍	❍
e. Workers were paid **'under the table'**	❍	❍	❍	❍	❍	❍	❍	❍	❍
f. Workers **'cut corners'** due to work pressures	❍	❍	❍	❍	❍	❍	❍	❍	❍
g. Workers worked **outside** their visa conditions	❍	❍	❍	❍	❍	❍	❍	❍	❍

Q16a And how often – if at all – did the business do each of the following in the last 12 months?
Please select one option for each statement. RDN.

	1 Not at all	2	3	4	5	6	7 Many times	97 NA	98 Don't know
h. Products were **substituted** without approval (i.e. without council or client approval)	❍	❍	❍	❍	❍	❍	❍	❍	❍
i. Workers' pay was **reduced** or deducted	❍	❍	❍	❍	❍	❍	❍	❍	❍
j. Workers were asked to complete tasks they were **not qualified** to do or were outside their skill-set	❍	❍	❍	❍	❍	❍	❍	❍	❍
k. Skilled workers were **poached** from other businesses	❍	❍	❍	❍	❍	❍	❍	❍	❍
l. Products were **stockpiled** and/or orders were greater than needed	❍	❍	❍	❍	❍	❍	❍	❍	❍
m. Workers did **not** follow all the COVID-19 health & safety protocols (e.g. physical distancing)	❍	❍	❍	❍	❍	❍	❍	❍	❍

Part C: Building quality, efficiency & readiness for change

The questions in this section are about **a range of current issues** being discussed in the building and construction sector, including those relating to design, workmanship and build quality, the use of technology, the regulatory environment.

Q17 Based on your experience, how much do you agree or disagree with each of the following?
Please select <u>one option</u> for each statement. RDN.

	1 Strongly disagree	2	3	4	5	6	7 Strongly agree	98 Don't know
a. The quality of **building design** in the sector is high	❍	❍	❍	❍	❍	❍	❍	❍
b. The quality of **building workmanship** is high	❍	❍	❍	❍	❍	❍	❍	❍
c. The sector is **cost-efficient**	❍	❍	❍	❍	❍	❍	❍	❍
d. The **skill base** of the workforce is high	❍	❍	❍	❍	❍	❍	❍	❍
e. The **regulatory environment** helps the sector design and build well	❍	❍	❍	❍	❍	❍	❍	❍
f. The sector is good at complying with health and safety requirements	❍	❍	❍	❍	❍	❍	❍	❍
g. Workers in the sector are **very familiar** with the NZ Building Code and Building Act	❍	❍	❍	❍	❍	❍	❍	❍

Q18 And how much do you agree or disagree with each of the following statements? *Please select <u>one option</u> for each statement. RDN.*

	1 Strongly disagree	2	3	4	5	6	7 Strongly agree	98 Don't know
a. There is **too much** reliance in the building and construction sector on **imported** skills	❍	❍	❍	❍	❍	❍	❍	❍
b. There is **too much** reliance in the building and construction sector on **imported** materials	❍	❍	❍	❍	❍	❍	❍	❍
c. The sector **readily** adopts new trends in building **design** and **construction** (e.g. green/sustainable buildings, zero energy buildings, off-site construction, smart buildings, etc.)	❍	❍	❍	❍	❍	❍	❍	❍
d. The sector **readily** adopts **technology**	❍	❍	❍	❍	❍	❍	❍	❍
e. Business owners in the sector **readily adapt to changes**	❍	❍	❍	❍	❍	❍	❍	❍
f. Businesses in the sector work well together, in a joined-up way	❍	❍	❍	❍	❍	❍	❍	❍
g. Businesses readily learn from their earlier mistakes and don't repeat them	❍	❍	❍	❍	❍	❍	❍	❍

Q19 If there was further disruption of the type we have been experiencing in the last two years because of the COVID-19 pandemic, how **prepared** would you say this business is in terms of each of the following?

Please select one option for each statement. RDN.

	1 Not at all prepared	2	3	4	5	6	7 Very prepared	98 Don't know
a. Its financial resources	❍	❍	❍	❍	❍	❍	❍	❍
b. Its use of technology	❍	❍	❍	❍	❍	❍	❍	❍
c. How it will complete its existing work	❍	❍	❍	❍	❍	❍	❍	❍
d. Its ability to continue working, but remotely	❍	❍	❍	❍	❍	❍	❍	❍
e. Its ability to manage the impact of delays	❍	❍	❍	❍	❍	❍	❍	❍
f. Its ability to manage the impact of increased project costs	❍	❍	❍	❍	❍	❍	❍	❍
g. Its ability to manage the impact of temporary potential staff shortage (e.g. they become sick)	❍	❍	❍	❍	❍	❍	❍	❍

Q20 And still thinking about further disruption. Does this business have **a plan** to deal with this?

1 .....Yes, this has been considered and the business has a plan
2 .....Yes, this has been considered, but the business has no plan
3 .....No, we haven't discussed this or have a written plan
98 ...Don't know
99 ...Would rather not say

Part D: Confidence in the building and construction sector

The question in this section is about **your confidence** with the various parties that operate in or have a role in the building and construction sector**.**

Q21 Still based on your experience, to what extent do you have **confidence** in each of the following? By 'confidence' we mean in terms of the impact they have on your business's ability to meet project deadlines, within budget and to the expected level of quality. *Please select one option for each statement. RDN.*

	1 Not at all confident	2	3	4	5	6	7 Extremely confident	98 Don't know
a. Councils and local government	❍	❍	❍	❍	❍	❍	❍	❍
b. Local manufacturers of products used in the building and construction sector	❍	❍	❍	❍	❍	❍	❍	❍
c. Overseas manufacturers of products that are imported into New Zealand	❍	❍	❍	❍	❍	❍	❍	❍
d. Transport companies that deliver ordered products	❍	❍	❍	❍	❍	❍	❍	❍
e. Retailers of products used by the building and construction sector	❍	❍	❍	❍	❍	❍	❍	❍

Part E: Future plans and expectations

The questions in this section are about the **next 12 and 24 months** (i.e. years ending 31 March 2023 and 2024).

Q22 How confident are you that this business will be operating in **12 months' time**?

Q22a. And in **24 months' time**?

a) In 12 months' time	b) In 24 months' time
1............Very confident 2............Confident 3............Unsure 98..........Don't know 99..........Would rather not say	1 .... Very confident 2 .... Confident 3 .... Unsure 98 .... Don't know 99 .... Would rather not say

Q23 Which **one** of the following best describes this business's plans for the next 12 months? Does the business want to …

1 .....Grow
2 .....Stay more or less the same size as it is now
3 .....Become smaller
4 .....Close down
98 ...Don't know
99 ...Would rather not say

Q24 In the previous question you said your business plans to … [**Response from Q23**]**.** In your opinion, which of these factors is this business's future plans **most** dependent on? These factors are **general** factors; in the following questions, the factors specifically relate to your industry and business. *Please select all that apply.*

1........... New Zealand's economic situation in general
2........... The world economic situation in general
3........... The government's strategies for the building and construction sector
4........... Specific regional conditions (e.g. demand for more construction work due to an earthquake, etc)
5........... The way the impact of the COVID-19 pandemic is managed
6........... Borders restrictions being lifted
7........... Personal/Family reasons (e.g. your health, plans to retire)
96..........Other general factors **Specify**

Q25 And which of these will affect your business's plans ... [**Response from Q23**]? These factors relate to your **industry**. *Please select all that apply.*

1........... The demand for work (more/less)
2........... What happens to workforce numbers (more/less)
3........... What happens to the availability of labour (more/less)
4........... The skill level of the workforce
5........... The culture of the sector (e.g. changing it to be a more high-performing sector)
6........... What happens to compliance costs
7........... Whether there are changes to building regulations
8........... The amount of compliance
9........... Other factors relating to your industry **Specify**

Q26 And which of these will affect your business's plans to … [**Response from Q23**]? These relate to your **business**. *Please select all that apply.*

1........... Getting more/fewer enquiries/projects from customers
2........... Upskilling your staff
3........... Getting more/losing staff
4........... Subcontractors' availability
5........... Staff's stress levels
6........... Business owner's stress levels
7........... Availability of specified materials
8........... Obtaining consent
9.............Having better/different processes in order to be more efficient
10...........Becoming more technological (e.g. using new software, tools, or modern machinery)
11...........Becoming more digital (e.g. using apps on phones)
12...........Pricing jobs accurately
13...........Cutting operating costs
14...........Having a different management style
15...........Having a different business model
16 .... Access to working capital (e.g. from the bank)
17 .... Access to investment capital
18 ....Other factors relating to your business **Specify**
98...........Don't know

Q27 **If Q23=4 skip to Q33, otherwise ask** At this stage, about how much **forward work** would you say the business has?

1 .....No forward work
2 .....Sufficient work to keep it busy for up to 6 months
3 .....7-12 months' work
4 .....More than 1 years' work, but less than 2 years
5 .....More than 2 years' work
98 ...Don't know
99 ...Would rather not say

Q28 What are the **Top 3 areas** of the business in which you would like the most help or advice?
Please select up to three areas.

1 .....Pricing jobs correctly
2 .....Managing employee performance
3 .....Reducing business costs
4 .....Marketing and advertising
5 .....Understanding building regulations
6 .....Managing cash flow
7 .....Diversifying the business
8 .....Adopting new technology
9 .....Managing mental wellbeing
10 ...Managing workplace health & safety
11 ...Training employees
12 ...Research & development
96 ...Other **Specify**
97 ...No areas
98 ...Don't know
99 ...Would rather not say

Part F: Upskilling and getting more staff

The questions in this section are about upskilling the business's existing staff and/or getting staff with different skills. These questions are important because having enough of the right staff is important to the sector going forward.

Q29 **If Q29=1-2 ask, else skip to Q33** Thinking some more about your business in the next 12 months. What type of staff, if any, does your business need in order to [grow/stay the same in terms of size].

	Entry level	Intermediate level	Experienced level	Advanced/Expert level
Yes	1	1	1	1
No	2	2	2	2
Don't know	98	98	98	98

Q30 **If Q29=1 at any level ask, else skip to Q33** Thinking more specifically about the types of staff the business needs. Please complete the following table to tell us what type of staff it needs. ***Note:*** *Please tick all the types it needs in the first column.*

Q31 And which of these types of staff is the business having **difficulties** recruiting, if any? ***Note:*** *Please tick all that apply in the second column.*

Staff the business needs	Staff the business is having difficulties recruiting
1 .... Managers	1..... Managers
2 .... Supervisors and Team Leaders	2..... Supervisors and Team Leaders
3 .... Technical people (e.g. architects, engineers)	3..... Technical people (e.g. architects, engineers)
4 .... Tradespeople (e.g. builders, plumbers)	4..... Tradespeople (e.g. builders, plumbers)
5 .... Administrative staff	5..... Administrative staff
6 .... Other non-technical staff (e.g. drivers, delivery staff)	6..... Other non-technical staff (e.g. drivers, delivery staff)
96 ..... Other	96... Other
97 ..... Not recruiting at present	97... Not recruiting at present
98 ..... Don't know	98... Don't know
99 ..... Would rather not say	99... Would rather not say

Q32 **If Q31=1-6, ask, else skip** Which of the following are reasons why this business is having difficulties recruiting skilled staff? *Please select all that apply.*

1 ....There are not enough/the pool is too small/few are in training
2 ....Work conditions in the industry are poor
3 ....H&S risks in the industry are high
4 ....Technologically-speaking, the industry is behind the times
5 ....There are few opportunities to personally develop in our industry
6 ....The industry doesn't pay enough
7 ....Insufficient skilled migrant workers coming into the country
8 ....They're not moving between jobs
9 ....Their current employers are paying them above the industry rate
10 ....Their current employers are giving them perks to stay
11 ....Skilled staff have a preference to live in large cities, whereas our business operates in a provincial area
96 ....Other Specify
98 ....Don't know
99 ....Would rather not say

Part G: Future trends in the building & construction sector

The questions in this section are about **future trends** in the building and construction sector.

Q33 To what extent would you say this business is currently **receiving enquiries or requests** by customers to design or build in a way that relates to each of the following?
Please select one option for each statement. RDN.

	1 Not at all	2	3	4	5	6	7 All the time	98 Don't know
a. Buildings which are **'greener'** or more energy-efficient (e.g. highly insulated buildings, buildings with solar panels, etc.)	❍	❍	❍	❍	❍	❍	❍	❍
b. Buildings which take account of **climate change** (e.g. zero emission buildings or passive homes)	❍	❍	❍	❍	❍	❍	❍	❍
c. **Accessible** buildings (i.e. buildings that are suitable for people with all levels of capability, including older people)	❍	❍	❍	❍	❍	❍	❍	❍
d. Buildings which take account of the trend to **work from home**	❍	❍	❍	❍	❍	❍	❍	❍
e. Buildings with **smaller** floor areas	❍	❍	❍	❍	❍	❍	❍	❍
f. Buildings which have **larger** floor areas								
g. **Medium and high** density housing	❍	❍	❍	❍	❍	❍	❍	❍
h. Buildings or building elements which are **manufactured off-site** (fully or partially)	❍	❍	❍	❍	❍	❍	❍	❍

Q34 To what extent does this business currently have the **capability** to assist customers who make these enquiries and requests? By this, we mean it has the knowledge, experience, processes, workforce and resources.
Please select <u>one option</u> for each statement. RDN.

	1 Not capable at all	2	3	4	5	6	7 Highly capable	98 Don't know
a. Buildings which are **'greener'** or more energy-efficient (e.g. highly insulated buildings, buildings with solar panels, etc.)	❍	❍	❍	❍	❍	❍	❍	❍
b. Buildings which take account of **climate change** (e.g. zero emission buildings or passive homes)	❍	❍	❍	❍	❍	❍	❍	❍
c. **Accessible** buildings (i.e. buildings that are suitable for people with all levels of capability, including older people)	❍	❍	❍	❍	❍	❍	❍	❍
d. Buildings which take account of the trend to **work from home**	❍	❍	❍	❍	❍	❍	❍	❍
e. Buildings with **smaller** floor areas	❍	❍	❍	❍	❍	❍	❍	❍
f. Buildings which have **larger** floor areas								
g. **Medium and high** density housing	❍	❍	❍	❍	❍	❍	❍	❍
h. Buildings or building elements which are **manufactured off-site** (fully or partially)	❍	❍	❍	❍	❍	❍	❍	❍

Q35 To what extend would each of the following help the business build its capability in relation to these future trends? *Please select one option in each column. RDN*

	1 Would not help at all	2	3	4	5	6	7 Would help it a lot	98 Don't know
a. Access to **better information** about future market trends	❍	❍	❍	❍	❍	❍	❍	❍
b. **Advice** from business advisors (e.g. accountant)	❍	❍	❍	❍	❍	❍	❍	❍
c. Develop a business plan	❍	❍	❍	❍	❍	❍	❍	❍
d. Change its business model	❍	❍	❍	❍	❍	❍	❍	❍
e. Retrain its staff	❍	❍	❍	❍	❍	❍	❍	❍
f. Employ people with **different** skill-sets								
g. **Invest** in technology	❍	❍	❍	❍	❍	❍	❍	❍
h. **Merge** with another business that has the capability	❍	❍	❍	❍	❍	❍	❍	❍
i. **Invest** in research & development	❍	❍	❍	❍	❍	❍	❍	❍

Part H: Final Questions

Here are the final questions.

Q36 Which of the following do you/does this business belong to?

Please select as many options as apply

1........Do not belong to an industry or professional body
2........New Zealand Institute of Architects (NZIA)
3........ Architectural Designers New Zealand (ADNZ)
4........Association of Consulting and Engineering (ACE)
5....... Building and Construction Industry Training Organisation (BCITO)
6........Engineering New Zealand
7........New Zealand Certified Builders Association (NZCB)
8........New Zealand Construction Industry Council (NZCIC)
9........New Zealand Green Building Council (NZGBC)
10......Registered Master Builders Association (RMBA)
95......Other **Specify**
96......Don't know
99......Would rather not say

Q37 What is the business's turnover/income in the most recent financial year?

a. ....Less than $100,000
b. ....$100,000 to $500,000
c. ....$500,001 to $1,000,000
d. ....$1,00,001 to $5,000,000
e. ....$5,000,001 to $10,000,000
f. .....$10,000,001 to $20,000,000
g. ....$20,000,001 to $50,000,000
h. ....$50,000,001 or more
i. .....Prefer not to say
j. .....Don't know

Q38 Which of these **ethnic** groups do you belong to?

Please select as many options as apply

1 .....New Zealand European (or Pākehā)
2 .....Māori
3 .....Pacific
4 .....Asian
5 .....Middle East/Latin American/African
95 ...Other **Specify**
99 ...Would rather not say

Q39 Were you **born** in New Zealand or overseas?

1 .....Born in New Zealand
2 .....Born overseas

Q40 About how long have you lived in New Zealand?

1 .....Less than 5 years
2 .....5-10 years
3 .....11-20 years
4 .....21-30 years
5 .....31 years or more
6 .....All my life
96 ...Don't know

Q41 What is your residency status?

1 .....I am a NZ citizen/NZ permanent resident
2 .....I am a resident visa holder
3 .....I am a temporary visa holder

Q42 Which of the following **age** groups do you come into?

1 .....Up to and including 20 years of age
2 .....21-29 years
3 .....30-39 years
4 .....40-49 years
5 .....50-59 years
6 .....60-69 years
7 .....70 and over

Q43 What **gender** do you identify as?

1 .....Male
2 .....Female
3 .....Gender diverse
99 ...Would prefer not to say

Q44 Do you have any other feedback you would like to provide given the subject topics covered in this survey? For example, about the future problems or risks that you see emerging in the building and construction sector, as a result of current practices and trends.

1 .....Yes **Please comment here**
2 .....No

Important message:

Would you like to:

- Enter the prize draw to win a $500 Bunnings, Mitre 10 or Placemakers voucher
- Share a survey link with an employee at this business, to get a second entry into the prize draw
- Complete a second confidential survey in 3 months' time? – [remove]
- I would <u>not</u> like to enter the prize draw, share a survey link or complete a follow-up survey in 3 months' time – [remove]

Please enter your contact information below:

a. Name ………………………………….
b. Phone number ……………………….
c. Email…………………………………..

Thank you, please pass on this survey link to one of your employees (if you've entered the prize draw, we'll give **you two chances to win**): **Link**

What are their contact details:

a. Name ………………………………….

b. Phone number ……………………….

c. Email…………………………………..

Thank you for completing this survey. If you have any questions you can go to our website www.researchnz.com or call us on 0800 273 732.

Close

MBIE – State of the Building & Construction Sector Survey - Workers

Research New Zealand #5273

DATE 28 March 2022 (Version 5) FINAL & APPROVED

Introduction

Thank you for taking the time to complete this **important research project** about the Building & Construction industry.

The survey is being completed on behalf of the Ministry of Business, Innovation & Employment (MBIE), to monitor the industry and identify the specific challenges and difficulties it is facing. As someone working in this industry, it is important that we receive your feedback.

Completing the survey is **voluntary**. However, it should only take up to 15 minutes to complete, depending on your answers.

Everyone who completes the survey will go into a **draw to win one of three vouchers worth $500 each, that they can spend at Bunnings, Mitre 10 or Placemakers**.

You can start the survey **here**.

Confidentiality

All the information you provide is **confidential**. We will provide the results back to MBIE in the form of summary statistics and anonymised data.

You can read more about our privacy policy **here**.

At the end of the survey, you'll be asked for your formal consent to complete a second confidential and optional survey in about 3 months' time.

Along the bottom of each screen:

If you have any questions about the survey, please go to our website www.researchnz.com or email Annita Wood of Research New Zealand at sobcs.survey@researchnz.com

QA Please provide your consent to complete this survey here.

1. ....I provide my consent
2. ....I do not provide my consent **Terminate**

Part A: About you and the business you work for

Q1. Which **one** of the following **best** describes you?

1. ....I am **new** to the building and construction sector (e.g. I am an apprentice, new graduate)
2. ....I have some work experience, but still work **under supervision**
3. .....I have enough work experience to work **independently**
4. .....I have **extensive** work experience, work independently and can coach others

96 ...Other **Please specify**

97 ...None of the above

Q2. Which **one** of the following best describes the industry the business you work for **mainly** operates in?

1. ....Residential building construction (e.g. house building)
2. ....Non-residential building construction
3. .....Heavy and civil engineering construction (e.g. road and bridge construction)
4. .....Construction services – Land development and site preparation services
5. .....Construction services – Building structural services (e.g. concreting and bricklaying)
6. .....Construction services – Building installation services (e.g. plumbing and electrical)
7. .....Construction services – Building completion services (e.g. plastering and painting)
8. .....Other building construction services (e.g. landscaping)
9. .....Scientific research services
10. ...Architectural, engineering and technical services

99 ...Do not work in any of the above industries **Terminate**

Q3 What type of construction work do you mainly do in your job?

• **Question 2**	• **Question 3**
1. Residential building construction	• House construction • Other residential building construction
2. Non-residential building construction	
3. Heavy and civil engineering construction	• Road and bridge construction • Other heavy and civil engineering construction
4. Construction services – Land development	• Land development & subdivision • Site preparation services
5. Construction services – Building structural	• Concreting services • Bricklaying services • Roofing services • Structural steel erection services
6. Construction services – Building installation	• Plumbing services • Electrical services • Air conditioning & heating services • Fire & security alarm services • Other building installation services
7. Construction services – Building completion	• Plastering and ceiling services • Carpentry services • Tiling and carpeting services • Painting and decorating services • Glazing services
8. Other building construction services	• Landscape construction services • Hire of construction machinery & operator • Other
9. Scientific research	
10. Architectural, engineering and technical services	• Architectural services • Surveying & mapping services • Engineering design & engineering consultancy services • Other specialised design services • Scientific testing & analysis services
96. Other	

Q4 About how many hours in a week do you normally spend doing your job?

1 .....Less than 10 hours
2 .....10-19 hours
3 .....20-29 hours
4 .....30-39 hours
5 .....40-49 hours
8 .....50 hours or more
98 ...Don't know
99 ...Would rather not say

Q5 About how long have you worked for the business you work for?

1 .....Less than 1 year
2 .....1 to less than 2 years
3 .....2 to less than 6 years
4 .....6 to less than 10 years
5 .....10 years or more
98 ...Don't know
99 ...Would rather not say

Q6 **If Error! Reference source not found.=1 ask, else skip to Error! Reference source not found.**
Did you come and work for this business from a similar business?

1 .....Yes, I left/resigned because the business I work for now made me a good offer
2 .....Yes, I left/resigned because I was dissatisfied
3 .....Yes, I was made redundant
4 .....No
98 ...Don't know
99 ...Would rather not say

Q7 How important a reason were each of the following for you when joining the business you are now working for?

Please select one option for each statement. RDN.

	1 Not at all important	2	3	4	5	6	7 Very Important	98 Don't know
a. The business said it would help me gain **further** qualifications	❍	❍	❍	❍	❍	❍	❍	❍
b. It pays a **higher-**than-average industry wage/salary	❍	❍	❍	❍	❍	❍	❍	❍
c. It provides me with **equipment and tools** (e.g. mobile phone, laptop)	❍	❍	❍	❍	❍	❍	❍	❍
d. It helps me keep **updated** with industry regulations (e.g. H&S requirements, changes in the Building Code)	❍	❍	❍	❍	❍	❍	❍	❍
e. It helps build my skills and confidence at **problem solving** in my job	❍	❍	❍	❍	❍	❍	❍	❍
f. It trains me to be an **innovative thinker**	❍	❍	❍	❍	❍	❍	❍	❍
g. It gives me **extra** perks (e.g. extra paid leave, flexible start-finish times, extra annual leave, company car)	❍	❍	❍	❍	❍	❍	❍	❍

Q7a. And what about these?

Please select <u>one option</u> for each statement. RDN.

	1 Not at all important	2	3	4	5	6	7 Very Important	98 Don't know
h. It gives me on the **job training** and other professional development opportunities	❍	❍	❍	❍	❍	❍	❍	❍
i. It has a reputation for helping its staff when they become **stressed**	❍	❍	❍	❍	❍	❍	❍	❍
j. It allows me to work remotely (e.g. from home)	❍	❍	❍	❍	❍	❍	❍	❍
k. It has a reputation for doing good work	❍	❍	❍	❍	❍	❍	❍	❍
l. It is an innovative company	❍	❍	❍	❍	❍	❍	❍	❍
m. I like the people I work with	❍	❍	❍	❍	❍	❍	❍	❍

Q8 In which part(s) of the country do you mainly work? *Please select as many as apply.*

1 .....Northland
2 .....Auckland
3 .....Waikato
4 .....Bay of Plenty
5 .....Gisborne
6 .....Hawke's Bay
7 .....Taranaki
8 .....Manawatū
9 .....Whanganui
10 ...Wairarapa
11 ...Wellington
12 ...Tasman
13 ...Nelson
14 ...Marlborough
15 ...West Coast
16 ...Canterbury
17 ...Otago
18 ...Southland
98 ...Don't know

Q9 **If the respondent works in only one region ask:**

Including yourself, about how many (full-time and part-time) staff currently work for the business? An estimate will do.

If the respondent works across two or more regions ask:

Including yourself, about how many (full-time and part-time) staff currently work for the business, across all sites/branches in New Zealand? An estimate will do.

1 .....Write in a number here:
98 Don't know

Q10 And about how long have you worked in the building and construction sector, in total?

1 .....Less than 1 year
2 .....1 to less than 2 years
3 .....2 to less than 6 years
4 .....6 to less than 10 years
5 .....10 years or more
98 ...Don't know
99 ...Would rather not say

Part B: The last 12 months

The questions in this section are about the business you currently work for and what happened in the **last 12 months (i.e. year ending 31 March 2022)**. ***Note:*** *Please remember this is a confidential survey and the results to this and following questions will only be reported in a summary form. This means that your individual answers will* ***not*** *be reported.*

Q11 Overall, to what extent would you say the business had a **busy** year?

1 .....Not at all busy
2 .....
3 .....
4 .....
5 .....
6 .....
7 .....Extremely busy
98…Don't know
99…Would rather not say

Q12 **If Q5=3-5 ask, else skip to Q13** How does this **compare** with how busy it was in the 12 months **before** the COVID-19 pandemic starting with the lockdown at the end of March 2020 (i.e. the year ending 31 March 2020)?

1 .....Not as busy
2 .....About the same
3 .....More busy
98 ...Don't know
99…Would rather not say

Q13 Did the business (that you work for) make any of the following decisions at any stage during the past year? *Please select all that apply.*

1 .....Asked staff to work part-time
2 .....Asked staff to take unpaid leave
3 .....Asked staff to take accrued holiday leave
4 .....Applied a pay cut to some staff
5... Offered pay rise to some staff
6 .....Made some staff redundant
7 .....Hired new staff
8 .....Invested in new equipment/technology
9 .....Invested in a new/another business
10 ...Took on new partners/shareholders
95 ...None of the above
98 ...Don't know
99 ...Would rather not say

Q14 And still thinking about the **COVID-19 pandemic**. In terms of the last 12 months, how and by how much would you say the business you currently work for has been impacted by the pandemic?
Please select one option for each statement. RDN.

	1 Negatively impacted	2	3	4 Not impacted	5	6	7 Positively impacted	98 Don't know
a. Ability to **meet deadlines**	❍	❍	❍	❍	❍	❍	❍	❍
b. **Availability** of specified materials	❍	❍	❍	❍	❍	❍	❍	❍
c. Specified materials being delivered **on time**	❍	❍	❍	❍	❍	❍	❍	❍
d. **Stress** levels amongst **workers**	❍	❍	❍	❍	❍	❍	❍	❍
e. **Stress** levels amongst **business owners**	❍	❍	❍	❍	❍	❍	❍	❍
f. Ability to secure **new** work	❍	❍	❍	❍	❍	❍	❍	❍
g. Availability of **skilled** workers	❍	❍	❍	❍	❍	❍	❍	❍
h. The fact that the borders have been **closed**	❍	❍	❍	❍	❍	❍	❍	❍
i. **Lockdowns** and related disruptions	❍	❍	❍	❍	❍	❍	❍	❍
j. **Remote** working of the **business's staff**	❍	❍	❍	❍	❍	❍	❍	❍
k. **Remote** working of staff from **other** businesses or other organisations the business is dependent on	❍	❍	❍	❍	❍	❍	❍	❍

Q15 The building and construction sector has experienced some **challenging times**. This is for a number of reasons, including the COVID-19 pandemic. This, in turn, has resulted in some work practices that would **not** normally be done.

Based on your own experience in the last 12 months, how often – if at all – did each of these happen to you? Remember this is a confidential survey.
Please select <u>one option</u> for each statement. RDN.

	1 Not at all	2	3	4	5	6	7 Many times	98 Don't know	99 Not applicable
a. I was paid **less than** the minimum wage	❍	❍	❍	❍	❍	❍	❍	❍	❍
b. I was **unable** to take leave and/or meal/rest breaks	❍	❍	❍	❍	❍	❍	❍	❍	❍
c. I wasn't given the health & safety training and equipment I needed to do my work safely	❍	❍	❍	❍	❍	❍	❍	❍	❍
d. I was asked to work **more** than the hours I was paid for	❍	❍	❍	❍	❍	❍	❍	❍	❍
e. I was paid **'under the table'**	❍	❍	❍	❍	❍	❍	❍	❍	❍
f. I **'cut corners'** due to work pressures	❍	❍	❍	❍	❍	❍	❍	❍	❍
g. I worked **outside** my visa conditions	❍	❍	❍	❍	❍	❍	❍	❍	❍
h. I **substituted** products and materials without approval (i.e. without council or client approval)	❍	❍	❍	❍	❍	❍	❍	❍	❍
i. My pay was **reduced** or deducted	❍	❍	❍	❍	❍	❍	❍	❍	❍
j. I was asked to complete tasks I am **not qualified** to do or are outside my skill-set	❍	❍	❍	❍	❍	❍	❍	❍	❍
k. I was **poached** from another business	❍	❍	❍	❍	❍	❍	❍	❍	❍
l. The business **stockpiled** products and materials and/or orders were placed greater than needed	❍	❍	❍	❍	❍	❍	❍	❍	❍
m. I did **not** follow all the COVID-19 health & safety protocols (e.g. physical distancing)	❍	❍	❍	❍	❍	❍	❍	❍	❍

Q16 If there was further disruption of the type we have experienced in the last 2 years because of the COVID-19 pandemic, how prepared would you say you are in terms of each of the following?

Please select one option for each statement. RDN.

	1 Not at all prepared	2	3	4	5	6	7 Very prepared	98 Don't know	99 Not applicable
a. Your personal financial position	❍	❍	❍	❍	❍	❍	❍	❍	❍
b. Your use of technology to complete your work	❍	❍	❍	❍	❍	❍	❍	❍	❍
c. Your ability to work remotely	❍	❍	❍	❍	❍	❍	❍	❍	❍
d. Your ability to manage the impact of delays on your work	❍	❍	❍	❍	❍	❍	❍	❍	❍

Part C: Building quality, efficiency & readiness for change

The questions in this section are about **a range of current issues** being discussed in the building and construction sector, including those relating to **design, workmanship and build quality, the use of technology, and the regulatory environment**.

Q17 Based on your experience, how much do you agree or disagree with each of the following?
Please select one option for each statement. RDN.

	1 Strongly disagree	2	3	4	5	6	7 Strongly agree	98 Don't know
a. The quality of **building design** in the sector is high	❍	❍	❍	❍	❍	❍	❍	❍
b. The quality of **building workmanship** is high	❍	❍	❍	❍	❍	❍	❍	❍
c. The sector is **cost-efficient**	❍	❍	❍	❍	❍	❍	❍	❍
d. The **skill base** of the workforce is high	❍	❍	❍	❍	❍	❍	❍	❍
e. The **regulatory environment** helps the sector design and build well	❍	❍	❍	❍	❍	❍	❍	❍
f. The sector is good at observing health and safety requirements	❍	❍	❍	❍	❍	❍	❍	❍
g. Workers in the sector are **familiar** with the NZ Building Act and Building Code	❍	❍	❍	❍	❍	❍	❍	❍
h. I have a good understanding of the Building Act and Building Code clauses that are relevant to me	❍	❍	❍	❍	❍	❍	❍	❍

Q18 How much do you agree or disagree with each of the following statements? *Please select one option for each statement. RDN.*

	1 Strongly disagree	2	3	4	5	6	7 Strongly agree	98 Don't know
a. The sector relies too much on **imported materials**	❍	❍	❍	❍	❍	❍	❍	❍
b. The sector relies too much on **overseas workers** with specialist skills	❍	❍	❍	❍	❍	❍	❍	❍
c. The sector **readily** adopts new trends in building **design** and **construction** (e.g. green/sustainable buildings, zero energy buildings, off-site construction, smart buildings, etc.)	❍	❍	❍	❍	❍	❍	❍	❍
d. The sector **readily** adopts **technology**	❍	❍	❍	❍	❍	❍	❍	❍
e. Business owners in the sector **readily adapt to changes**	❍	❍	❍	❍	❍	❍	❍	❍
f. Businesses in the sector work well together, in a joined-up way	❍	❍	❍	❍	❍	❍	❍	❍
g. Businesses readily learn from their earlier mistakes and don't repeat them	❍	❍	❍	❍	❍	❍	❍	❍

Part D: Confidence in the building and construction sector

The question in this section is about **your confidence** with the various parties that operate in or have a role in the building and construction sector**.**

Q19 Still based on your experience, to what extent do you have confidence in each of the following? By 'confidence' we mean in terms of the impact they have on your ability to meet project deadlines, within budget and to the expected level of quality. *Please select one option for each statement. RDN.*

	1 Not at all confident	2	3	4	5	6	7 Extremely confident	98 Don't know
a. Councils and local government	❍	❍	❍	❍	❍	❍	❍	❍
b. Local manufacturers of products used in the building and construction sector	❍	❍	❍	❍	❍	❍	❍	❍
c. Overseas manufacturers of products that are imported into New Zealand	❍	❍	❍	❍	❍	❍	❍	❍
d. Transport companies that deliver ordered products	❍	❍	❍	❍	❍	❍	❍	❍
e. Retailers of products used by the building and construction sector	❍	❍	❍	❍	❍	❍	❍	❍

Part E: Your overall satisfaction, future plans and expectations

The questions in this section are about your **overall satisfaction** with your current job and the business you work for, and your future plans in the next 12 months.

Q20 Overall, how satisfied are you with your current job and the business you work for?

	1 Very dissatisfied	2	3	4	5	6	7 Very satisfied	98 Don't know
a. Your job	❍	❍	❍	❍	❍	❍	❍	❍
b. The business you work for	❍	❍	❍	❍	❍	❍	❍	❍

Q21 Which of the following do you see getting better, worse or staying the same in the **next 12 months**?

	1 Getting worse	2 Staying the same	3 Getting better	98 Don't know
a. Your pay rate	❍	❍	❍	❍
b. The amount of overtime/long hours you have to work	❍	❍	❍	❍
c. Workplace mental wellbeing	❍	❍	❍	❍
d. The amount of time 'wasted' not being able to do the work you plan to do	❍	❍	❍	❍
e. The ability for you to work flexibly (e.g. hours or places worked)	❍	❍	❍	❍
f. Your ability to get training/upskilling	❍	❍	❍	❍
g. Your physical safety at work	❍	❍	❍	❍
h. Your overall working conditions	❍	❍	❍	❍
i. Your overall work-life balance	❍	❍	❍	❍
j. Your job security	❍	❍	❍	❍
k. Your ability to use your skills at your work	❍	❍	❍	❍
l. Your autonomy at work (ability to self-manage)	❍	❍	❍	❍
m. The normal number of working hours you work (which impact your income)	❍	❍	❍	❍
n. The availability of work you do in the region you currently work in	❍	❍	❍	❍

Q22 Which, if any, of the following things do you plan to do within the **next 12 months**?

1 .....Get extra qualifications in the building and construction sector
2 .....Leave your job for another job in the sector
3 .....Set up your own business in the sector
4 .....Look to get promoted in the business you currently work for
5 .....Pause and do extra training/study
6 .....Pause for personal reasons
7 .....Leave NZ to travel, but with a view to return
8 .....Leave NZ to live and work elsewhere
96 ...Other **Specify**
97 None of the above

Q23 And what about the **next 5 years**?

1 .....Get extra qualifications in the building and construction sector
2 .....Leave your job for another job in the sector
3 .....Set up your own business in the sector
4 .....Look to get promoted in the business you currently work for
5 .....Pause and do extra training/study
6 .....Pause for personal reasons
7 .....Leave NZ to travel, but with a view to return
8 .....Leave NZ to live and work elsewhere
96 ...Other **Specify**
97 ...None of the above

Part F: Future trends in the building & construction sector

The questions in this section are about **future trends** in the building and construction sector.

Q24 To what extent are you interested in developing **your skills and expertise** in each of the following?
Please select <u>one option</u> for each statement. RDN.

	1 No interest at all	2	3	4	5	6	7 Very strong interest	98 Don't know
a. Buildings which are **'greener'** or more energy-efficient (e.g. highly insulated buildings, buildings with solar panels, etc.)	❍	❍	❍	❍	❍	❍	❍	❍
b. Buildings which take account of **climate change** (e.g. zero emission buildings or passive homes)	❍	❍	❍	❍	❍	❍	❍	❍
c. **Accessible** buildings (i.e. buildings that are suitable for people with all levels of capability, including older people)	❍	❍	❍	❍	❍	❍	❍	❍
d. Buildings which take account of the trend to **work from home**	❍	❍	❍	❍	❍	❍	❍	❍
e. Buildings with **smaller** floor areas	❍	❍	❍	❍	❍	❍	❍	❍
f. Buildings which have **larger** floor areas	❍	❍	❍	❍	❍	❍	❍	❍
g. **Medium and high** density housing	❍	❍	❍	❍	❍	❍	❍	❍
h. Buildings or building elements which are **manufactured off-site** (fully or partially)	❍	❍	❍	❍	❍	❍	❍	❍

Q25 And thinking of your skills and expertise as of today, how confident would you say you are in each of these areas.
Please select one option for each statement. RDN.

	1 Not at all confident	2	3	4	5	6	7 Extremely confident	98 Don't know
a. Buildings which are **'greener'** or more energy-efficient (e.g. highly insulated buildings, buildings with solar panels, etc.)	❍	❍	❍	❍	❍	❍	❍	❍
b. Buildings which take account of **climate change** (e.g. zero emission buildings or passive homes)	❍	❍	❍	❍	❍	❍	❍	❍
c. **Accessible** buildings (i.e. buildings that are suitable for people with all levels of capability, including older people)	❍	❍	❍	❍	❍	❍	❍	❍
d. Buildings which take account of the trend to **work from home**	❍	❍	❍	❍	❍	❍	❍	❍
e. Buildings with **smaller** floor areas	❍	❍	❍	❍	❍	❍	❍	❍
f. Buildings which have **larger** floor areas								
g. **Medium and high** density housing	❍	❍	❍	❍	❍	❍	❍	❍
h. Buildings or building elements which are **manufactured off-site** (fully or partially)	❍	❍	❍	❍	❍	❍	❍	❍

Part G: Final Questions

Here are the final questions.

Q26 Which of the following industry and professional bodies do you belong to, if any?
Please select as many options as apply

1 ....Do not belong to an industry or professional body
2.......New Zealand Institute of Architects (NZIA)
3 ....Architectural Designers New Zealand (ADNZ)
4 ......Association of Consulting and Engineering (ACE)
5 ......Building and Construction Industry Training Organisation (BCITO)
6 ......Engineering New Zealand
7 ......New Zealand Certified Builders Association (NZCB)
8 ......New Zealand Construction Industry Council (NZCIC)
9 ......New Zealand Green Building Council (NZGBC)
10 .....Registered Master Builders Association (RMBA)
96.....Other Specify
98.....Don’t know
99.....Would rather not say

Q27 Which **one** of the following **best** describes how you are currently paid by the business you work for?

1 .....A fixed salary
2 .....Paid by the hour
3 .....Paid according to fixed price contracts
96 Other **Specify**
99 Prefer not to say

Q28 Which **one** of the following **best** describes your annual income from your current job, before tax?

1 .....Up to and including $20,000
2 .....$20,001-$50,000
3 .....$50,001-$70,000
4 .....$70,001-$100,000
5 .....$100,001-$150,000
6 .....$150,001 or more
99 ...Prefer not to say

Q29 Which **one** of the following is your **highest** educational status?

1 ....Secondary/High school qualification
2 ....Certificate in building and construction industry training
3 ....Trade qualification (e.g. Civil Trades Certificate)
4 ....Tertiary certificate/Diploma (lower than Bachelor's degree)
5 ....Bachelor's degree (or higher)
6 ....Post-graduate certificate or higher (including Honours, Post-graduate Diploma, Masters or PhD)
96 ...Other **Specify**
97 ...No formal qualifications
98…Prefer not to say

Q30 **If Error! Reference source not found.=1-6 ask, else skip** And did you get this qualification in New Zealand or overseas?

1 .....New Zealand
2 .....Overseas
99 ...Would rather not say

Q31 Which of these **ethnic** groups do you belong to?
Please select as many options as apply

1 .....New Zealand European (or Pākehā)
2 .....Māori
3 .....Pacific
4 .....Asian
5 .....Middle East/Latin American/African
96 ...Other **Specify**
99 ...Would rather not say

Q32 Were you **born** in New Zealand or overseas?
3 .....Born in New Zealand
4 .....Born overseas

Q33 About how long have you lived in New Zealand?
1 .....Less than 5 years
2 .....5-10 years
3 .....11-20 years
4 .....21-30 years
5 .....31 years or more
6 .....All my life
96 Don't know

Q34 What is your residency status?
1 .....I am a NZ citizen/NZ permanent resident
2 .....I am a resident visa holder
3 .....I am a temporary visa holder

Q35 **If Q41=2ask, else skip to Error! Reference source not found.** What type of resident visa are you currently on?
1 .....Skilled migrant category visa
2 .....Residence from work visa
3 .....Business and investor visa
4 .....Partnership visa
5 .....Family visa (excluding partnership)
96 ...Other **Specify**
97 Don't know

Q36 **If Q41=3 ask, else skip Error! Reference source not found.** What type of temporary visa are you currently on?
1 .....Essential skills visa
2 .....Work to residence visa
3 .....Partnership visa
4 .....Student visa
5 .....Post-study work visa
96 ...Other **Specify**
98 Don't know

Q37 Is English your first language?
1 .....Yes
2 .....No
97 Don't know

Q38 Which of the following **age** groups do you come into?

1 .....Up to and including 20 years of age
2 .....21-29 years
3 .....30-39 years
4 .....40-49 years
5 .....50-59 years
6 .....60-69 years
7 .....70 and over

Q39 What **gender** do you identify as?

1 .....Male
2 .....Female
3 .....Gender diverse
99 Would prefer not to say

Q40 Do you have any other feedback you would like to provide given the subject topics covered in this survey? For example, about any future problems or risks that you see emerging in the building and construction sector, as a result of current practices and trends.

1 .....Yes **Please comment here**
2 .....No

Important message:

Would you like to:

- Enter the prize draw to win a $500 Bunnings, Mitre 10 or Placemakers voucher
- Complete a second confidential survey in 3 months' time?
- I would not like to enter the prize draw or complete a follow-up survey in 3 months' time

Please enter your contact information below:

a. Name …………………………………
b. Phone number ………………………
c. Email…………………………………..

Thank you for completing this survey. If you have any questions you can go to our website www.researchnz.com or call us on 0800 273 732.

Close

MBIE – State of the Building & Construction Sector Survey – END-USERS

Research New Zealand #5273

DATE 30 March 2022 (Version 7) FINAL APPROVED

Updated 30 March 2022

Introduction

Thank you for taking the time to complete this **important research project** about the Building & Construction industry.

The survey is being completed on behalf of the Ministry of Business, Innovation & Employment (MBIE). It will be repeated each year and used to:

- Monitor the industry and identify the specific challenges and difficulties it is facing.
- Develop policy and programmes to support the sector.

Completing the survey is **voluntary**. However, it should only take up to 15 minutes to complete, depending on your answers.

You can start the survey by clicking on the save and continue button below.

Confidentiality

All the information you provide is **confidential**. We will provide the results back to MBIE in the form of summary statistics and anonymised data.

You can read more about our privacy policy **here**.

Along the bottom of each screen:

If you have any questions about the survey, please go to our website www.researchnz.com or email Annita Wood at Research New Zealand at sobcs.survey@researchnz.com.

Part A: About you

Q1 Which of the following **best** describes you? *Please select <u>as many as apply</u>*

1 .....I own/part-own the place where I live
2 .....I own/part-own another residential property in New Zealand
3 .....I am a tenant/boarder where I currently live, paying rent/board
4 .....I do not own my current place of residence, and I do not pay either rent/board
96 ...Other **Please specify**

Q2 In the **<u>last</u> 12 months**, have you started any of the following? They may be completed or still in progress? *Please select <u>as many as apply</u>. Please note: House/apartment/unit refers to your own-occupied home or investment property.*

1. ....Building a **new** house/townhouse/apartment/unit
2. ....**Major** renovations (e.g. structural changes, an extension, roof change, cladding change, etc.)
3 .....**Minor** renovations (e.g. fixing faulty parts, bathroom upgrade, replacing carpets/flooring, rewiring, etc.)
4 .....Landscaping/outdoor work
5 .....Interior/exterior painting and decorating
96 ...Other **Please specify**
97 ...No building work/renovations completed/started in the last 12 months

Q3 And still thinking about the **<u>last</u> 12 months**, have you **delayed** any of the following? *Please select <u>as many as apply</u>*

1. ....Building a **new** house/townhouse/apartment/unit
2. ....**Major** renovations (e.g. structural changes, an extension, roof change, cladding change, etc.)
3 .....**Minor** renovations (e.g. fixing faulty parts, bathroom upgrade, replacing carpets/flooring, rewiring, etc.)
4 .....Landscaping/outdoor work
5 .....Interior/exterior painting and decorating
96 ...Other **Please specify**
97 ...No building work/renovations delayed in the last 12 months

Q4 And in the **<u>next</u> 12 months**, are you **planning to start** any of the following? *Please select <u>as many as apply</u>*

1. ....**Building** a new house/townhouse/apartment/unit
2. ....**Major** renovations (e.g. structural changes, an extension, roof change, cladding change, etc.)
3 .....**Minor** renovations (e.g. fixing faulty parts, bathroom upgrade, replacing carpets/flooring, rewiring, etc.)
4 .....Landscaping/outdoor work
5 .....Interior/exterior painting and decorating
96 ...Other **Please specify**
97 ...No building work/renovations planned

NOTE:
If Q2=1-3 go to Part B
If Q3=1-3 go to Part C
If Q4=1-3 go to Part D

PRIORITISATION: Part B first, then Part C and then Part D

If Q3, Q3 OR Q4 DOES <u>NOT</u> EQUAL 1-3 TERMINATE

Part B: About your new house/renovation **If Q2=1-3, else skip to 0**

The following questions are about the project you have started in the last 12 months. That is [the building of a new home, your major renovations, your minor renovations]. You may have completed this project or it may still be in progress.

Q5 **If Q2=2-3, else skip to Q5a** Which **one** of these best describes what your [minor/major] renovations are for?

1. ....A standalone house
2. ....A townhouse/flat
3. ....An apartment/unit
4. ....A retirement village unit
5. ....Other **Please specify**

Q5a **If Q2=1, else skip to 0** Which **one** of these best describes what you built/started building in the last 12 months?

1. ....A standalone house
2. ....A townhouse/flat
3. ....An apartment/unit
4. ....A retirement village unit
5. ....Other **Please specify**

Q6 Which of the following apply to the [… house/townhouse/apartment/unit] that you are building/had built? *Please select as many as apply*

1. ....This is the first [… house/townhouse/apartment/unit] I have ever had built
2. ....It is (being) built by a group builder (e.g. G J Gardiner, …)
3. ....I/We have bought this as a 'land and house' package
4. ....I/we intend to live in the [… house/townhouse/apartment/unit]
5. ....None of the above apply

Q7 Are you/did you …

1 .....Building/Build 'off the plans' with some flexibility to make changes
2 .....Building/Build 'off the plans' with no flexibility
3 .....Building/Build a [… house/townhouse/apartment/unit] that you have designed with an architect/architectural designer to specifically meet your needs

Q8 About what size is the [… house/apartment/townhouse]? Please include any garaging.

1. ....Up to and including 30 square metres
2. ....Between 31-70 square metres
3. ....Between 71-100 square metres
4. ....Between 101-150 square metres
5. ....Between 151-200 square metres
6. ....Between 201-250 square metres
7. ....251 square metres or more

98 Don't know

Q9 At what stage would you say you are in terms of the building your new [… house/townhouse/apartment/unit] OR your renovations?

1 .....At the design stage
2 .....Getting consent
3 .....Getting quotes
4 .....Finalising a contract
5 .....Work has just commenced
6 .....Work is midway through completion
7 .....Work has almost finished
8 .....Work has been completed, but the final Code of Compliance Certificate (also known as CCC) is not issued yet
9 .....Final CCC has been obtained
96 Other **Please specify**

Q10 At any stage has/was the work **delayed**?

1. ....Yes, delays experienced
2. ....No, no delays experienced

Q11 **If 0=1, else skip to 0** Which of these are a reason for these delays? *Please select all the options that apply*

1. ....Delays with bank approving finance
2. ....Delays obtaining consent to start
3. ....Designer not available
4. ....Delays finalising a contract with builder
5. ....Builder not available (to start and/or complete work)
6. ....Specified materials not available
7. ....Issues with quality of work/Needing to correct work
8. ....Delays due to mediation/legal action
9. ....Issues with getting final Code of Compliance Certificate
10. ..Delays resulting from COVID-19 in general

96 Other **Please specify**

Q12 Thinking about the delays. How much would you say each of these is an **impact** resulting from the delays?
Please select one option for each statement. RDN.

	1 Not an impact at all	2	3	4	5	6	7 A significant impact	98 Don't know
a. More time and effort from you than initially expected	❍	❍	❍	❍	❍	❍	❍	❍
b. Dissatisfaction with the process	❍	❍	❍	❍	❍	❍	❍	❍
c. Strained relationships with the people/businesses involved in the process	❍	❍	❍	❍	❍	❍	❍	❍
d. High levels of stress	❍	❍	❍	❍	❍	❍	❍	❍
e. Additional/unexpected costs	❍	❍	❍	❍	❍	❍	❍	❍
f. Changes to building specifications	❍	❍	❍	❍	❍	❍	❍	❍
g. Cancellation of building plans	❍	❍	❍	❍	❍	❍	❍	❍

Q13 **If 0=7-9, else skip to 0** About how long did it take to complete the building/renovations?

1. ....Up to and including 3 months
2. ....Between 4-6 months
3. ....Between 7-9 months
4. ....Between 10-12 months
5. ....Between 13-18 months
6. ....Longer than 18 months

98 Don't know

Q14 Compared to what you expected, is this timeframe…?

1. ....Longer
2. ....About what was expected
3. ....Shorter
4. ....Not completed yet

98 ...Don't know
99 Would prefer not to say

Q15 **If Q5a answered ask, else skip to Q16** Which of the following does/will … [the house/townhouse/apartment/unit] have, if any? *Please select as many as apply*

1. ....Triple glazed windows
2. ....Solar panels
3. ....Energy efficient appliances
4. ....Smart appliance control system

5 Smart heating system
6 Smart or automatic window blinds
7 .....Smart rainwater collection system
8 .....Smart irrigation system
95 None of the above

Q16 **If Q5 answered ask, else skip** Which of the following does/will the … [house/townhouse/apartment/unit] have as a result of the renovation, if any? *Please select as many as apply*

1. ....Double glazed windows
2. ....Insulation in the roof cavity
3. ....Insulation in the walls
4. ....Insulation under the floor
5. ....Draught stopping for existing doors and windows
6. ....Solar panels
7. ....Energy efficient appliances
8. ....New or improved heating system
9. ....New or improved ventilation system
10. ..Smart appliance control system

11 Smart or automatic window blinds
12 ...Smart water collection system
13 ...Smart irrigation system
95 None of the above

Q17 **If 0=1-8 OR 0=1-13, else skip to Q18** Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why your house will have these features?
Please select one option for each statement. RDN.

	1 Not at all a reason	2	3	4	5	6	7 An extremely important reason	98 Don't know
a. To be more environmentally friendly	❍	❍	❍	❍	❍	❍	❍	❍
b. To reduce future costs in terms of operating the home	❍	❍	❍	❍	❍	❍	❍	❍
c. To increase re-sale value or rental return	❍	❍	❍	❍	❍	❍	❍	❍
d. To have a healthier home (e.g. warmer in winter)	❍	❍	❍	❍	❍	❍	❍	❍
e. To meet Building Code requirements	❍	❍	❍	❍	❍	❍	❍	❍
f. To meet Healthy Homes legal requirements	❍	❍	❍	❍	❍	❍	❍	❍
g. To have a modern look/style	❍	❍	❍	❍	❍	❍	❍	❍

Q18 Did you make **changes** to what you had originally planned at any stage of the build or renovation?

1. ....Yes, made changes
2. ....No, no changes made

Q19 **If Q18=1, else skip to 0** Which of these are a reason for these changes? *Please select as many as apply*

1. ....To obtain consent/meet regulations
2. ....To manage costs/cost increases
3. ....To manage delays in the availability of my preferred architect/architectural designer
4. ....To manage delays in the availability of my preferred builder
5. ....To manage delays in the availability of my preferred materials/products
6. ....To better meet personal needs

95 ...None of the above
96 Other **Please specify**

Q20 **If Q19=1-6, else skip to Q21** Which of the following did you do as a result of these changes, if any? *Please select as many as apply*

1. ....Decided to leave out parts of the build/renovation, possibly to do in the future
2. ....Decided to use lower priced materials and fittings
3. ....Decided to use materials and fittings that aren't as environmentally friendly
4. ....Decided to use materials and fittings that aren't as energy efficient

7 .....Decided to down-size generally
8 .....Decided to use recycled/used materials
95 ...None of the above
96 Other **Please specify**

Q21 What is the estimated value of your building work?

1. ....Up to and including $25,000
2. ....$25,001-$50,000
3. ....$50,001-$100,000
4. ....$100,001-$250,000
5. ....$250,001- $500,000
6. ....$500,001-$750,000
7. ....$750,001-$1,000,000
8. ....$1,000,001- $1,500,000
9. ....$1,500,001 or more

98 ...Don't know
99 Would prefer not to say

Q22 Is this higher, lower or about the same as your original quote (or agreed price)?

1 Lower
2 About the same
3 Higher
98 ...Don't know
100 Would prefer not to say

Q23 **If 0=1 or 3, else skip to Q24** About how much [lower OR higher]?

1. ....Up to and including 10%
2. ....Between 11-20%

3 .....Between 21-50%
4 .....Between 51-75%
5 .....Between 76-100%
6 .....More than 100%
98 ...Don't know
99 Would prefer not to say

Q24 **If Q9=6-9, else skip to Q26** Overall, how satisfied are you with the quality of your [new house/townhouse/apartment OR renovations]?

1. ....Very dissatisfied
2. ....Dissatisfied
3. ....Neither satisfied nor dissatisfied
4. ....Satisfied
5. ....Very satisfied

98 Don't know
99 Would prefer not to say

Q25 Please provide an explanation here for the rating you have given in the previous question.

1. ....Comment **Please specify**

98 ...Don't know
99 ...Would prefer not to say

Q26 **If 0=5-9, else skip to Q27** At any stage of the work, did you notice or did any of the following happen? *Please select as many as apply*

1. ....Disputes around the project delivery dates
2. ....Disputes around the quality of the work
3. ....Spending more than the initially estimated budget for your project
4. ....Tradespeople adding costs to your project, claiming that these were due to COVID-19
5. ....You had to agree to using substituted products as the specified products were not available
6. ....You charged penalties / got discounts from tradespeople working on your project due to delays arising from COVID-19
7. ....You were offered special “cash rates” for your job
8. ....You accepted a verbal quote, without anything being written down
9. ....The work had to be redone because you were not happy about the quality of the work
10. .. You asked for special “cash rates” for your job

95 None of the above
98 Don't know
99 Would prefer not to say

Q27 Was anything identified that needed to be redone because it wasn't quite right, or the quality wasn't up to standard, or the council inspector requested a fix?

1 Yes
2 No
98 Don't know
99 Would prefer not to say

Q28 **If Q27=1, else skip to Q30** How long did it take to resolve this matter (most recent matter)?

1. ....Hasn't been resolved yet
2. ....Resolved immediately
3. ....Resolved within about one week
4. ....Resolved within about one month
5. ....Took longer than one month to resolve

98 Don't know
99 Would rather not say

Q29 Did you involve (have you involved) any of the following (for the issues you mentioned in the previous question)? *Please select as many as apply*

1. ....The architect's/Architectural designer's industry/professional body (e.g. NZIA or Architectural Designers New Zealand)
2. ....The builder's industry/professional body (e.g. Certified Builders, Master Builders)
3. ....Local council
4. ....A government department (e.g. MBIE, Building Practitioners Board)
5. ....Court
6. ....Your lawyer
7. ....Building Disputes Tribunal

95 None of the above involved
98 ...Don't know
99 Would prefer not to say

Q30 Did you/do you have a written contract with your builder?

1 Yes
2 No
98 Don't know
99 Would prefer not to say

Q31 How familiar would you say you are with the legal protection that is available to people who are building a new house [or renovating]?

1 Not at all familiar
2 Somewhat familiar
3 Very familiar
98 Don't know
99 Would prefer not to say

Q32 Overall, how satisfied are you with the building protection you have as a consumer under the law?

1 Very dissatisfied
2 Dissatisfied
3 Neither satisfied nor dissatisfied
4 Satisfied
5 .....Very satisfied
98 ...Don't know
99 ...Would prefer not to say

Q33 About how much trust and confidence would you say you have in each of the following?
Please select one option for each statement. RDN.

	1 No trust & confidence at all	2	3	4	5	6	7 Full trust & confidence	98 Don't know
a. Architects and architectural designers involved in the building and construction sector	❍	❍	❍	❍	❍	❍	❍	❍
b. Engineers	❍	❍	❍	❍	❍	❍	❍	❍
c. The building trade	❍	❍	❍	❍	❍	❍	❍	❍
d. Land surveyors	❍	❍	❍	❍	❍	❍	❍	❍
e. Local councils	❍	❍	❍	❍	❍	❍	❍	❍
f. Suppliers of materials	❍	❍	❍	❍	❍	❍	❍	❍

Q34 About how much do you agree or disagree with each of the following?
Please select <u>one option</u> for each statement. RDN.

	1 Strongly disagree	2	3	4	5	6	7 Strongly agree	98 Don't know
a. Most tradespeople will 'cut corners' to save time or money	❍	❍	❍	❍	❍	❍	❍	❍
b. Most tradespeople offer good value for money	❍	❍	❍	❍	❍	❍	❍	❍
c. People can have trust and confidence to get their job done well	❍	❍	❍	❍	❍	❍	❍	❍
d. Most tradespeople will comply with the necessary regulations and standards	❍	❍	❍	❍	❍	❍	❍	❍

NOW GO TO 74

Part C: Delaying the build of your new house/renovations **If Q3=1-3, else skip to 0**

The following questions are about the project you have delayed in the last 12 months. That is, the delaying of… [the building of a new home, your major renovations, your minor renovations].

Q35 **If Q3=2-3, else skip to Q34a** Which **one** of these best describes what [minor/major] renovations were delayed?

1. ....It is a standalone house
2. ....It is a townhouse/flat
3. ....It is an apartment/unit
4. ....It is a retirement village unit
5. ....Other **Please specify**

Q35a **If Q3=1, else skip to 0** Which of these best describes what you have delayed building?

1. ....It is a standalone house
2. ....It is a townhouse/flat
3 It is an apartment/unit
4 It is a retirement village unit
96 ...Other **Please specify**

Q36 Which of the following will apply to this [… house/townhouse/apartment/unit]? *Please select as many as apply*

1. ....This is the first …[house/townhouse/apartment/unit] I will ever have built
2. ....It will be built by a group builder (e.g. G J Gardiner, …)
3. ....It will be a 'land and house' package
4. ....I intend to live in the [… house/townhouse/apartment/unit]
5. ....None of the above apply

Q37 Will you …

1. ....Build 'off the plans' with some flexibility to make changes
2. ....Build 'off the plans' with no flexibility
3. ....Build a [… house/townhouse/apartment/unit] that you have designed with an architect/architectural designer to specifically meet your needs

Q38 What is the estimated size of the [… house/townhouse/apartment/unit]? Please include any garaging.

1. ....Up to and including 30 square metres
2. ....Between 31-70 square metres
3. ....Between 71-100 square metres
4. ....Between 101-150 square metres
5. ....Between 151-200 square metres
6. ....Between 201-250 square metres
7. ....251 square metres or more
98 ...Don't know

Q39 At what stage were you in the build/renovation when you decided to delay your plans?

1 .....At the initial concept stage, when I was thinking/planning what to build/renovate
2 .....Seeking an architect/architectural designer
3 .....At the design stage
4 .....Getting consent
3 .....Getting quotes
4 .....Finalising a contract
5 .....Work had just commenced
6 .....Work was midway through completion
7 .....Work had almost finished
96 ...Other **Please specify**

Q40 Thinking about your decision to delay your plans. How much would you say each of these is important in explaining why you made this decision?

Please select one option for each statement. RDN.

	1 Not at all a reason	2	3	4	5	6	7 An extremely important reason	98 Don't know
a. Ongoing cost increases	❍	❍	❍	❍	❍	❍	❍	❍
b. Difficulties in obtaining consent	❍	❍	❍	❍	❍	❍	❍	❍
c. Architect/architectural designer/Engineer not available	❍	❍	❍	❍	❍	❍	❍	❍
d. Preferred architect/architectural designer/Engineer not available	❍	❍	❍	❍	❍	❍	❍	❍
e. Builder not available	❍	❍	❍	❍	❍	❍	❍	❍
f. Preferred builder not available	❍	❍	❍	❍	❍	❍	❍	❍

Q40a And what about these? How much would you say each of these is important in explaining why you made this decision?
Please select one option for each statement. RDN.

	1 Not at all a reason	2	3	4	5	6	7 An extremely important reason	98 Don't know
a. Delays in availability of preferred materials/products	❍	❍	❍	❍	❍	❍	❍	❍
b. Personal financial position changed	❍	❍	❍	❍	❍	❍	❍	❍
c. Other aspects of personal position changed (e.g. health)	❍	❍	❍	❍	❍	❍	❍	❍
d. When COVID-19 disruptions become more manageable at a national and/or international level	❍	❍	❍	❍	❍	❍	❍	❍

Q41 **If Q35a answered ask, else skip to 0** Which of the following will … [the new house/townhouse/apartment] have, if any? *Please select as many as apply*

1. ....Triple glazed windows
2. ....Solar panels
3. ....Energy efficient appliances
4. ....Smart appliance control system
5 .....Smart heating system
6 .....Smart or automatic window blinds
7 .....Smart water collection system
8 .....Smart irrigation system
95 None of the above

Q42 **If Q35 answered ask, else skip to 0** Which of the following will your [house/townhouse/apartment] have as a result of the renovation, if any? *Please select as many as apply*

1. ....Double glazed windows
2. ....Insulation in the roof cavity
3. ....Insulation in the walls
4. ....Insulation under the floor
5. ....Draught stopping for existing doors and windows
6. ....Solar panels
7. ....Energy efficient appliances
8. ....New or improved heating system
9. ....New or improved ventilation system
10. ..Smart appliance control system
11 Smart or automatic window blinds
12 ...Smart water collection system
13 ...Smart irrigation system
95 None of the above

Q43 **If 0=1-8 OR 0=1-13 ask, else skip to 0** Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why you'd like your house to have these features?
Please select one option for each statement. RDN.

	1 Not at all a reason	2	3	4	5	6	7 An extremely important reason	98 Don't know
a. To be more environmentally friendly	❍	❍	❍	❍	❍	❍	❍	❍
b. To reduce future costs in terms of operating the home	❍	❍	❍	❍	❍	❍	❍	❍
c. To increase re-sale value or rental return	❍	❍	❍	❍	❍	❍	❍	❍
d. To have a healthier home (e.g. warmer in Winter, so we get fewer colds)	❍	❍	❍	❍	❍	❍	❍	❍
e. To meet Building Code requirements	❍	❍	❍	❍	❍	❍	❍	❍
f. To meet Healthy Home legal requirements	❍	❍	❍	❍	❍	❍	❍	❍
g. To have a modern look/style	❍	❍	❍	❍	❍	❍	❍	❍

Q44 Even though you have delayed your plans, at any stage before that, did you make **changes** to what you had originally planned?

1. ....Yes, made changes
2. ....No, no changes made

Q45 **If 0=1, else skip to 0** Which of these are a reason for these changes? *Please select as many as apply*

1. ....To obtain consent/meet regulations
2. ....To manage costs/cost increases
3. ....To manage delays in the availability of your preferred architect/architectural designer
4. ....To manage delays in the availability of your preferred builder
5. ....To manage delays in the availability of your preferred materials/products
6. ....To better meet personal needs

95 None of the above

96 Other **Please specify**

Q46 **If 0=1-6, else skip to 0** Which of the following did you do as a result of these changes, if any? *Please select as many as apply*

1. ....Decided to leave out parts of the build/renovation, possibly to do in the future
2. ....Decided to use lower priced materials and fittings
3. ....Decided to use materials and fittings that aren't as environmentally friendly
4. ....Decided to use materials and fittings that aren't as energy efficient
5. .....Decided to down-size generally
6. .....Decided to use recycled/used materials

95 None of the above

Q47 Thinking about your decision to delay your plans. How much would you say each of these is an impact resulting from the delays?
Please select one option for each statement. RDN.

	1 Not at all an impact	2	3	4	5	6	7 An extremely important impact	98 Don't know
a. More time and effort from you than initially expected	❍	❍	❍	❍	❍	❍	❍	❍
b. Dissatisfaction with the process	❍	❍	❍	❍	❍	❍	❍	❍
c. Strained relationships with the people/businesses involved in the process	❍	❍	❍	❍	❍	❍	❍	❍
d. High levels of stress	❍	❍	❍	❍	❍	❍	❍	❍
e. Additional/unexpected costs	❍	❍	❍	❍	❍	❍	❍	❍
h. Changes to building specifications	❍	❍	❍	❍	❍	❍	❍	❍
i. Cancellation of building plans	❍	❍	❍	❍	❍	❍	❍	❍

Q48 What is the estimated value of your building work (excluding the land price)? If you have bought a 'land and house' package, what is the estimated construction costs?

1. ....Up to and including $25,000
2. ....$25,001-$50,000
3. ....$50,001-$100,000
4. ....$100,001-$250,000
5. ....$250,001- $500,000
6. ....$500,001-$750,000
7. ....$750,001-$1,000,000
8. ....$1,000,001- $1,500,000
9. ....$1,500,001 or more

98 Don't know
99 Would prefer not to say

Q49 At this stage, when are you likely to start your build or renovations?

1 Within the next 3 months
2 In 4-6 months' time
3 In 7-12 months' time
4 In 1-2 years' time
5 In 3 years' time or more
98 ...Don't know
99 ...Would prefer not to say

Q50 How much would you say each of these will be a deciding factor in terms of when you will start?
Please select one option for each statement. RDN.

	1 Not at all a reason	2	3	4	5	6	7 An extremely important reason	98 Don't know
a. When building costs stabilise	❍	❍	❍	❍	❍	❍	❍	❍
b. When an architect/architectural designer becomes available	❍	❍	❍	❍	❍	❍	❍	❍
c. When your preferred architect/architectural designer becomes available	❍	❍	❍	❍	❍	❍	❍	❍
d. When a builder becomes available	❍	❍	❍	❍	❍	❍	❍	❍
e. When your preferred builder becomes available	❍	❍	❍	❍	❍	❍	❍	❍

Q50a And what about these? How much would you say each of these will be a deciding factor in terms of when you will start?
Please select one option for each statement. RDN.

	1 Not at all a reason	2	3	4	5	6	7 An extremely important reason	98 Don't know
f. When your preferred materials/products become available	❍	❍	❍	❍	❍	❍	❍	❍
g. When you get consent	❍	❍	❍	❍	❍	❍	❍	❍
h. When your personal financial situation changes	❍	❍	❍	❍	❍	❍	❍	❍
i. When other aspects of your personal situation change (e.g. health)	❍	❍	❍	❍	❍	❍	❍	❍
j. When COVID-19 disruptions become more manageable at a national and/or international level	❍	❍	❍	❍	❍	❍	❍	❍

Q51 At the time you delayed the building of your new house/renovation, did you have a written contract with a builder?

1 Yes
2 No
3 Builder not yet selected
98 Don't know
99 Would prefer not to say

Q52 How familiar would you say you are with the legal protection that is available to people who are building a new house [or renovating]?

1 Not at all familiar
2 Somewhat familiar
3 Very familiar
98 Don't know
99 Would prefer not to say

Q53 Overall, how satisfied are you with the building protection you have as a consumer under the law?

1 Very dissatisfied
2 Dissatisfied
3 Neither satisfied nor dissatisfied
4 Satisfied
5 .....Very satisfied
98 ...Don't know
99 ...Would prefer not to say

Q54 About how much trust and confidence would you say you have in each of the following?
Please select one option for each statement. RDN.

	1 No trust & confidence at all	2	3	4	5	6	7 Full trust & confidence	98 Don't know
a. Architects and designers involved in the building and construction sector	❍	❍	❍	❍	❍	❍	❍	❍
b. Engineers	❍	❍	❍	❍	❍	❍	❍	❍
c. Land surveyors	❍	❍	❍	❍	❍	❍	❍	❍
d. The building trade	❍	❍	❍	❍	❍	❍	❍	❍
e. Local councils	❍	❍	❍	❍	❍	❍	❍	❍
f. Suppliers of materials	❍	❍	❍	❍	❍	❍	❍	❍

Q55 About how much do you agree or disagree with each of the following?
Please select one option for each statement. RDN.

	1 Strongly disagree	2	3	4	5	6	7 Strongly agree	98 Don't know
a. Most tradespeople will 'cut corners' to save time or money	❍	❍	❍	❍	❍	❍	❍	❍
b. Most tradespeople offer good value for money	❍	❍	❍	❍	❍	❍	❍	❍
c. People can have trust and confidence to get their job done well	❍	❍	❍	❍	❍	❍	❍	❍
d. Most tradespeople will comply with the necessary regulations and standards	❍	❍	❍	❍	❍	❍	❍	❍

NOW GO TO 74

Part D: Planning to build a new house/renovate in the next 12 months **If Q4=1-3, else skip to 0**

The following questions are about the project you plan to start in the next 12 months. That is, your plans to start… [the building of a new home, your major renovations, your minor renovations].

Q56 **If Q4=2-3, else skip to Q56a** Which **one** of these best describes what the [minor/major] renovations you are planning are for?

1. ....It is a standalone house
2. ....It is a townhouse/flat
3. ....It is an apartment/unit
4. ....It is a retirement village unit
5. ....Other **Please specify**

Q56a **If Q4=1, else skip to Q57** Which of these best describes what you plan to build?

1. ....It is a standalone house
2. ....It is a townhouse

4 It is an apartment/unit

5 It is a retirement village unit

96 ...Other **Please specify**

Q57 Which of the following will apply to this [… house/townhouse/apartment/unit]? *Please select as many as apply*

1. ....This is the first ….[house/townhouse/apartment/unit] I will ever have built
2. ....It will be built by a group builder (e.g. G J Gardiner, …)
3. ....It will be a 'land and house' package
4. ....I intend to live in the [… house /townhouse/apartment/unit]
5. ....None of the above apply

Q58 Will you …

1. ....Build 'off the plans' with some flexibility to make changes
2. ....Build 'off the plans' with no flexibility
3. ....Build a [… house/townhouse/apartment/unit] that you have designed with an architect/architectural designer to specifically meet your needs

98 Don't know

Q59 About what will be the size of the [… house/townhouse/apartment/unit]? Please include any garaging.

1. ....Up to and including 30 square metres
2. ....Between 31-70 square metres
3. ....Between 71-100 square metres
4. ....Between 101-150 square metres
5. ....Between 151-200 square metres
6. ....Between 201-250 square metres
7. ....251 square metres or more

98 ...Don't know

Q60 At what stage are you at in terms of your building or renovation work?

1 .....At the initial concept stage, I'm still thinking about/planning what to build/renovate
2 .....Seeking an architect/architectural designer
3 .....At the design stage
4 .....Getting consent
3 .....Getting quotes
4 .....Finalising a contract
96 Other **Please specify**

Q61 **If Q56a answered ask, else skip to Q62** Which of the following will … [the new house/townhouse/apartment] have, if any? *Please select as many as apply*

1. ....Triple glazed windows
2. ....Solar panels
3. ....Energy efficient appliances
4. ....Smart appliance control system
5 .....Smart heating system
6 .....Smart or automatic window blinds
7 .....Smart water collection system
8 .....Smart irrigation system
95 None of the above

Q62 **If Q56 answered ask, else skip to Q63** Which of the following will your [house/townhouse/apartment] have as a result of the renovation, if any? *Please select as many as apply*

1. ....Double glazed windows
2. ....Insulation in the roof cavity
3. ....Insulation in the walls
4. ....Insulation under the floor
5. ....Draught stopping for existing doors and windows
6. ....Solar panels
7. ....Energy efficient appliances
8. ....New or improved heating system
9. ....New or improved ventilation system
10. ..Smart appliance control system
96 Smart or automatic window blinds
12 ...Smart water collection system
13 ...Smart irrigation system
95 None of the above

Q63 **If 0=1-8 OR Q62=1-13, else skip to Q64** Thinking about how you have answered the previous question. How much would you say each of these is important in explaining why you'd like your house to have these features?
Please select one option for each statement. RDN.

	1 Not at all a reason	2	3	4	5	6	7 An extremely important reason	98 Don't know
a. To be more environmentally friendly	❍	❍	❍	❍	❍	❍	❍	❍
b. To reduce future costs in terms of operating the home	❍	❍	❍	❍	❍	❍	❍	❍
c. To increase re-sale value or rental return	❍	❍	❍	❍	❍	❍	❍	❍
d. To have a healthier home (e.g. warmer in winter, so we get fewer colds)	❍	❍	❍	❍	❍	❍	❍	❍
e. To meet Building Code requirements	❍	❍	❍	❍	❍	❍	❍	❍
f. To meet Healthy Homes legal requirements	❍	❍	❍	❍	❍	❍	❍	❍
g. To have a modern look/style	❍	❍	❍	❍	❍	❍	❍	❍

Q64 Even though you haven't started [building OR renovating] yet, have you at any stage made changes to your original plans?

1. ....Yes, made changes
2. ....No, no changes made

Q65 **If 0=1, else skip to Q67** Which of these are a reason for these changes? *Please select as many as apply*

1. ....To obtain consent/meet regulations
2. ....To manage costs/cost increases
3. ....To manage delays in the availability of your preferred architect/architectural designer
4. ....To manage delays in the availability of your preferred builder
5. ....To manage delays in the availability of your preferred materials/products
6. ....To better meet personal needs

95 ...None of the above

96 Other **Please specify**

Q66 **If 0=1-6, else skip to Q67** Which of the following did you do as a result of these changes, if any? *Please select as many as apply*

1. ....Decided to leave out parts of the build/renovation, possibly to do in the future
2. ....Decided to use lower priced materials and fittings
3. ....Decided to use materials and fittings that aren't as environmentally friendly
4. ....Decided to use materials and fittings that aren't as energy efficient

5 .....Decided to down-size

6 .....Decided to use recycled/used materials

95 None of the above

Q67 What is the estimated value of your building work (excluding the land price)? If you have bought a 'land and house' package, what is the estimated construction cost?

1. ....Up to and including $25,000
2. ....$25,001-$50,000
3. ....$50,001-$100,000
4. ....$100,001-$250,000
5. ....$250,001- $500,000
6. ....$500,001-$750,000
7. ....$750,001-$1,000,000
8. ....$1,000,001- $1,500,000
9. ....$1,500,001 or more

98 ...Don't know

99 ...Would prefer not to say

Q68 You have said that you plan to start [building your new house/townhouse/apartment OR your renovations] in the next 12 months. How much would you say each of these will be a deciding factor in your plan to build or renovate?

Please select one option for each statement. RDN.

	1 Not at all a reason	2	3	4	5	6	7 An extremely important reason	98 Don't know
a. When building costs stabilise	❍	❍	❍	❍	❍	❍	❍	❍
b. When an architect/architectural designer becomes available	❍	❍	❍	❍	❍	❍	❍	❍
c. When your preferred architect/architectural designer becomes available	❍	❍	❍	❍	❍	❍	❍	❍
d. When a builder becomes available	❍	❍	❍	❍	❍	❍	❍	❍
e. When your preferred builder becomes available	❍	❍	❍	❍	❍	❍	❍	❍

Q68a And what about these? How much would you say each of these will be a deciding factor in your plan to build or renovate?

Please select one option for each statement. RDN.

	1 Not at all a reason	2	3	4	5	6	7 An extremely important reason	98 Don't know
f. When your preferred materials/products become available	❍	❍	❍	❍	❍	❍	❍	❍
g. When you get consent	❍	❍	❍	❍	❍	❍	❍	❍
h. When your personal financial situation changes	❍	❍	❍	❍	❍	❍	❍	❍
i. When other aspects of your personal situation change (e.g. health)	❍	❍	❍	❍	❍	❍	❍	❍
j. When Covid-19 disruptions become more manageable at a national and/or international level	❍	❍	❍	❍	❍	❍	❍	❍

Q69 Do you plan to have a written contract with your builder when you start building/your renovations?

1 Yes
2 No
3 Builder not yet selected
98 Don't know
99 Would prefer not to say

Q70 How familiar would you say you are with the legal protection that is available to people who are building a new house [or renovating]?

1 Not at all familiar
2 Somewhat familiar
3 Very familiar
98 Don't know
99 Would prefer not to say

Q71 Overall, how satisfied are you with the building protection you have as a consumer under the law?

1 Very dissatisfied
2 Dissatisfied
3 Neither satisfied nor dissatisfied
4 Satisfied
5 .....Very satisfied
98 ...Don't know
99 ...Would prefer not to say

Q72 About how much trust and confidence would you say you have in each of the following?
Please select one option for each statement. RDN.

	1 No trust & confidence at all	2	3	4	5	6	7 Full trust & confidence	98 Don't know
a. Architects, designers, and engineers involved in the building and construction sector	❍	❍	❍	❍	❍	❍	❍	❍
b. Engineers	❍	❍	❍	❍	❍	❍	❍	❍
c. Land surveyors	❍	❍	❍	❍	❍	❍	❍	❍
d. The building trade	❍	❍	❍	❍	❍	❍	❍	❍
e. Local councils	❍	❍	❍	❍	❍	❍	❍	❍
f. Suppliers of materials	❍	❍	❍	❍	❍	❍	❍	❍

Q73 About how much do you agree or disagree with each of the following?
Please select <u>one option</u> for each statement. RDN.

	1 Strongly disagree	2	3	4	5	6	7 Strongly agree	98 Don't know
a. Most tradespeople will 'cut corners' to save time or money	❍	❍	❍	❍	❍	❍	❍	❍
b. Most tradespeople offer good value for money	❍	❍	❍	❍	❍	❍	❍	❍
c. People can have trust and confidence to get their job done well	❍	❍	❍	❍	❍	❍	❍	❍
d. Most tradespeople will comply with the necessary regulations and standards	❍	❍	❍	❍	❍	❍	❍	❍

Part E: Final questions

Q74 To finish off, please answer the following questions about yourself. Which of the following age groups do you come under?

1 18-24
2 25-29
3 30-34
4 35-39
5 40-44
6 45-49
7 50-54
8 55-59
9 60-64
10 ...65-69
11 ...70-74
12 ...75 and over

Q75 What is your highest educational status?

1 ....Secondary/high school qualification
2 ....Trade qualification
3 ....Tertiary certificate/diploma (lower than Bachelor's degree)
4 ....Bachelor's degree (or equivalent)
5 ....Postgraduate degree or higher (including Honours, Post-graduate Diploma, Masters, or PhD)
96 Other
97 No qualification
98 Don't know
99 Would prefer not to say

Q76 Which ethnic group (or groups) do you belong to?
Please select as many options as apply

1 .....New Zealand European (or Pākehā)
2 .....Māori
3 .....Samoan
4 .....Cook Island Māori
5 .....Tongan
6 .....Niuean
7 .....Chinese
8 .....Indian
96 ...Other ethnic group **Please specify**
99 ...Would prefer not to say

Q77 Were you **born** in New Zealand or overseas?

1 .....Born in New Zealand
2 .....Born overseas

Q78 About how long have you lived in New Zealand?

1 .....Less than 5 years
2 .....5-10 years
3 .....11-20 years
4 .....21-30 years
5 .....31 years or more
6 .....All my life
96 Don't know

Q79 What is your residency status?

1 .....I am a NZ citizen/NZ permanent resident
2 .....I am a resident visa holder
3 .....I am a temporary visa holder

Q80 Which **one** of the following best describes you at present?

1 .....I am an employer
2 .....I am self-employed
3 .....I am an employee, earning a wage or salary
4 .....I'm a full-time homemaker or renovator
5 .....I am a student
6 .....I'm unemployed
7 .....I'm retired
8 .....I receive a benefit or government support payments (also includes Superannuation and Covid Wage Subsidies)
96 Other

Q81 Which **one** of the following **best** describes your household?

1 .....Single person household
2 .....Single parent with child/children
3 .....Couple with no children
4 .....Couple with child/children
5 .....Other
99 Would prefer not to say

Q82 **If Q81=3-4, else skip to Q83** What is your **combined household income before tax and other deductions**, for the last year? Please include any child support, benefits or other income support you have received. Please remember, this is a confidential survey and the results will only be reported in the form of summary statistics.

1 .....No income
2 .....$20,000 or less
3 .....$20,001-$40,000
4 .....$40,001-$60,000
5 .....$60,001-$80,000
6 .....$80,001-$100,000
7 .....$100,001-$120,000
5 .....$120,001-$140,000
6 .....More than $140,001
98 ...Don't know
99 ...Would prefer not to say

Q83 **If 0=1-2/5, else skip to 0** What is your personal income before tax and other deductions, for the last year? Please include any child support, benefits or other income support you may receive. Please remember, this is a confidential survey and the results will only be reported in the form of summary statistics.

1 .....No income
2 .....$20,000 or less
3 .....$20,001-$40,000
4 .....$40,001-$60,000
5 .....$60,001-$80,000
6 .....$80,001-$100,000
7 .....$100,001-$120,000
5 .....$120,001-$140,000
6 .....More than $140,001
98 ...Don’t know
99 ...Would prefer not to say

Q84 In which part of the country do you live in?

1 .....Northland
2 .....Auckland
3 .....Waikato
4 .....Bay of Plenty
5 .....Gisborne
6 .....Hawke's Bay
7 .....Taranaki
8 .....Manawatū
9 .....Whanganui
10 ...Wairarapa
11 ...Wellington
12 ...Tasman
13 ...Nelson
14 ...Marlborough
15 ...West Coast
16 ...Canterbury
17 ...Otago
18 ...Southland
98 Don’t know

Q85 And do you live in a …?

1 .....Large city
2 .....Small town
3 .....Or rural area
99 Would prefer not to say

Q86 What gender do you identify as?

1 .....Male
2 .....Female
4 .....Gender diverse
99 Would prefer not to say

Q87 Do you have any other feedback you would like to provide given the subject topics covered in this survey?

1 .....Yes **Please comment here**
2 .....No

Thank you for completing this survey. If you have any questions you can go to our website www.researchnz.com or call us on 0800 273 732.

Close

Appendix C: Weighting parameters – business owners/managers and workers

Table 104: Enterprises by industry category

Level	Number	%
1. Residential building construction	23,928	28.72
2. Non-residential building construction	1,656	1.92
3. Heavy and civil engineering construction	1,914	2.30
4. Construction services – Land development	5,235	6.28
5. Construction services – Building structural	4,101	4.76
6. Construction services – Building installation	14,136	16.96
7. Construction services – Building completion	12,801	14.85
8. Other building construction services	3,981	4.62
9. Scientific research	759	0.88
10. Architectural, engineering and technical services	14,811	17.19
96. Other	2,868	3.33
Total	86,190	101.81

Source: Statistics New Zealand (Business Demographics, 2021).

Table 105: Workers by industry category

Level	Number	%
1. Residential building construction	36,300	14.93
2. Non-residential building construction	11,500	4.73
3. Heavy and civil engineering construction	37,400	15.39
4. Construction services – Land development	12,200	5.02
5. Construction services – Building structural	10,800	4.46
6. Construction services – Building installation	43,800	18.06
7. Construction services – Building completion	20,000	8.25
8. Other building construction services	9,200	3.78
9. Scientific research	8,200	3.37
10. Architectural, engineering and technical services	43,200	17.77
97. Other	10,300	4.24
Total	242,900	100.00

Source: Statistics New Zealand (Business Demographics, 2021).

Appendix D: Respondent profiles – business owners and workers (pre- and post-weighted samples) and end-users (unweighted)

Business owners

Table 106: Respondent profile – Business owners

	Pre-weighted	Post-weighted
Base =	1029	1029
	%	%
Industry category:		
Residential building construction	32	29
Non-residential building construction	6	2
Heavy and civil engineering construction	4	2
Land development and site preparation services	4	6
Building structural services (e.g., concreting and bricklaying)	5	5
Building installation services (e.g., plumbing and electrical)	12	17
Building completion services (e.g., plastering and painting)	11	15
Other building construction services (e.g., landscaping)	13	5
Scientific research services	3	1
Architectural, engineering and technical services	10	18
Total	100	100
Years in operation:		
Less than 1 year	3	3
1 to less than 2 years	4	4
2 to less than 6 years	18	18
6 to less than 10 years	14	13
10 years or more	60	61
Don't know	1	0
Total	100	100
Size:		
1 (Sole trader)	24	24
2-5	25	25
6-9	14	15
10-19	15	16
20-49	10	9
50-99	4	4
100+	6	5
Don't know	2	2
Total	100	100

Continued

Table 106: Respondent profile – Business owners (continued)

Base =	Pre-weighted 1029 %	Post-weighted 1029 %
Business identifies as a …:		
Māori business	6	6
Pasifika business	3	3
Neither	83	83
Don't know	3	3
Would rather not say	5	4
Total	100	100
Industry/Professional affiliations:		
Do not belong to an industry or professional body	35	34
New Zealand Institute of Architects (NZIA)	6	7
Architectural Designers New Zealand (ADNZ)	5	6
Association of Consulting and Engineering (ACE)	4	5
Building and Construction Industry Training Organisation (BCITO)	16	15
Engineering New Zealand	7	9
New Zealand Certified Builders Association (NZCB)	11	11
New Zealand Construction Industry Council (NZCIC)	4	4
New Zealand Green Building Council (NZGBC)	3	4
Registered Master Builders Association (RMBA)	10	9
Other	16	17
Don't know	7	6
Would rather not say	5	4
Total	**	**

Continued

Table 106: Respondent profile – Business owners (continued)

Base =	Pre-weighted 1029 %	Post-weighted 1029 %
Regions business mainly operating in:		
Northland	4	4
Auckland	35	36
Waikato	11	13
Bay of Plenty	9	9
Gisborne	1	2
Hawke's Bay	4	4
Taranaki	3	3
Manawatū	5	6
Whanganui	2	2
Wairarapa	3	3
Wellington	14	14
Tasman	2	2
Nelson	2	2
Marlborough	1	1
West Coast	2	2
Canterbury	17	17
Otago	7	7
Southland	3	4
All New Zealand	4	4
Total	100	100

Continued

Table 106: Respondent profile – Business owners (continued)

Base =	Pre-weighted 1029 %	Post-weighted 1029 %
Turnover:		
Less than $100,000	16	15
$100,001 to $500,000	20	21
$500,001 to $1,000,000	10	11
$1,000,001 to $5,000,000	20	20
$5,000,001 to $10,000,000	8	8
$10,000,001 to $20,000,000	6	6
$20,000,001 to $50,000,000	3	2
$50,000,001 or more	4	4
Don't know	4	4
Would rather not say	10	10
Total	100	100
Status:		
Business owner/partner	56	55
Senior manager	25	26
Self-employed	19	19
Total	100	100
Ethnicity:		
New Zealand European (or Pakeha)	79	80
Māori	10	10
Pacific	3	3
Asian	9	9
Middle East/Latin American/African	1	1
Other (Please specify)	5	4
Total	**	**

Continued

Table 106: Respondent profile – Business owners (continued)

Base =	Pre-weighted 1029 %	Post-weighted 1029 %
Born in New Zealand:		
Born in New Zealand	76	77
Born overseas	24	23
Total	100	5
Years lived in New Zealand:		
Less than 5 years	1	1
5-10 years	4	4
11-20 years	8	8
21-30 years	8	8
31 years or more	14	14
All my life	64	65
Total	100	100
Residency status:		
I am a NZ citizen/NZ permanent resident	97	97
I am a resident visa holder	3	3
I am a temporary visa holder	0	0
Total	100	100

** Total may exceed 100% because of multiple responses.

Workers

Table 107: Respondent profile – Workers

	Pre-weighted	Post weighted
Base =	784	784
	%	%
Status:		
I am new to the building and construction sector (e.g., an apprentice)	9	7
I have some work experience, but still work under supervision	16	15
I have enough work experience to work independently	30	31
I have extensive work experience, work independently and can coach others	41	42
Total	100	100
Years worked in the sector:		
Less than 1 year	7	10
1 to less than 2 years	8	10
2 to less than 6 years	21	29
6 to less than 10 years	16	19
10 years or more	46	31
Total	100	100
Industry category:		
Residential building construction	26	16
Non-residential building construction	8	5
Heavy and civil engineering construction	7	16
Land development and site preparation services	5	5
Building structural services (e.g., concreting and bricklaying)	5	5
Building installation services (e.g., plumbing and electrical)	12	19
Building completion services (e.g., plastering and painting)	8	9
Other building construction services (e.g., landscaping)	10	4
Scientific research services	2	4
Architectural, engineering and technical services	17	19
Total	100	100

Continued

Table 107: Respondent profile – Workers (continued)

	Pre-weighted	Post weighted
Base =	784	784
	%	%
Age:		
Up to and including 20 years	1	1
21-29	14	15
30-39	31	31
40-49	24	24
50-59	16	17
60-69	11	11
70+	2	2
Total	100	100
Gender:		
Male	71	70
Female	27	28
Gender diverse	1	1
Total	100	100
Ethnicity:		
New Zealand European (or Pakeha)	69	68
Māori	15	16
Pasifika (Samoan, Cook Island Māori, Tongan, Niuean)	5	4
Asian	13	13
Middle Eastern/Latin American/African	2	2
Another ethnic group	6	7
Total	**	**

Continued

Table 107: Respondent profile – Workers (continued)

	Pre-weighted	Post weighted
Base =	784	784
	%	%
Weekly hours worked:		
Less than 10 hours	2	2
10-19 hours	4	4
20-29 hours	8	8
30-39 hours	20	19
40-49 hours	52	50
50 hours or more	13	16
Don't know	1	1
Would rather not say	1	1
Total	100	100
Years worked for current employer:		
Less than 1 year	10	10
1 to less than 2 years	11	10
2 to less than 6 years	29	29
6 to less than 10 years	17	19
10 years or more	31	31
Would rather not say	1	1
Total	100	100
Resigned or poached (n=81^):		
Yes, I left/resigned because the business I work for now made me a good offer	14	13
Yes, I left/resigned because I was dissatisfied	26	28
Yes, I was made redundant	6	4
No	52	54
Don't know	1	1
Would rather not say	1	1
Total	100	100

^ Employed for less than 12 months in current job.

Continued

Table 107: Respondent profile – Workers (continued)

	Pre-weighted	Post weighted
Base =	784	784
	%	%
Industry/Professional affiliations:		
Do not belong to an industry or professional body	36	36
New Zealand Institute of Architects (NZIA)	7	7
Architectural Designers New Zealand (ADNZ)	5	5
Association of Consulting and Engineering (ACE)	5	6
Building and Construction Industry Training Organisation (BCITO)	13	11
Engineering New Zealand	9	11
New Zealand Certified Builders Association (NZCB)	9	8
New Zealand Construction Industry Council (NZCIC)	6	6
New Zealand Green Building Council (NZGBC)	3	3
Registered Master Builders Association (RMBA)	6	4
Other (Please specify)	10	11
Don't know	11	11
Would rather not say	7	7
Total	**	**
Payment method:		
A fixed salary	35	37
Paid by the hour	54	52
Paid according to fixed price contracts	8	7
Other	2	2
Would rather not say	2	3
Total	100	100

Continued

Table 107: Respondent profile – Workers (continued)

	Pre-weighted	Post weighted
Base =	784	784
	%	%
Annual income:		
Up to and including $20,000	1	1
$20,001 - $50,000	12	11
$50,001 - $70,000	29	27
$70,001 - $100,000	32	35
$100,001 - $150,000	13	15
$150,001 or more	3	3
Would rather not say	9	9
Up to and including $20,000	1	1
Total	100	100
Educational status:		
Secondary/high school qualification	16	13
Certificate in building and construction industry training	8	7
Trade qualification (e.g., Civil Trades Certificate)	29	31
Tertiary certificate/diploma	19	20
Bachelor's degree (or higher)	15	15
Post-graduate certificate or higher	8	9
Other	1	1
No formal qualifications	3	3
Would rather not say	2	2
Total	100	100
Qualification obtained in New Zealand (n=741^):		
New Zealand	87	86
Overseas	12	13
Would rather not say	1	1
Total	100	100

^ Have qualification.
Continued

Table 107: Respondent profile – Workers (continued)

	Pre-weighted	Post weighted
Base =	784	784
	%	%
Born in New Zealand:		
Born in New Zealand	76	76
Born overseas	24	24
Total	100	100
Years lived in New Zealand:		
Less than 5 years	3	3
5-10 years	6	7
11-20 years	9	8
21-30 years	11	12
31 years or more	11	12
All my life	60	58
Total	100	100
Residency status		
I am a NZ citizen/NZ permanent resident	94	94
I am a resident visa holder	4	4
I am a temporary visa holder	1	1
Total	100	100
Type of residency visa (n=34*)		
Skilled migrant category visa	24	23
Residence from work visa	35	32
Business and investor visa	15	12
Partnership visa	15	17
Other	6	8
Don't know	6	9
Total	100	100
Type of residency visa (n=10*)		
Essential skills visa	30	20
Work to residence visa	10	10
Partnership visa	10	13
Post-study work visa	40	44
Other (Please specify)	10	13
Total	100	100
English first language:		
Yes	88	88
No	12	12
Total	100	100

Continued

Table 107: Respondent profile – Workers (continued)

	Pre-weighted	Post-weighted
Base =	784	784
	%	%
Region mainly work in:		
Northland	5	6
Auckland	36	36
Waikato	14	15
Bay of Plenty	8	9
Gisborne	2	3
Hawke's Bay	5	6
Taranaki	4	4
Manawatū	5	6
Whanganui	3	3
Wairarapa	3	3
Wellington	13	14
Tasman	2	3
Nelson	3	4
Marlborough	2	2
West Coast	1	2
Canterbury	20	21
Otago	6	6
Southland	3	4
Total	100	100

** Total may exceed 100% because of multiple responses.

End-users

Table 108: Respondent profile – End-users

	End-users
Base =	1001
	%
Homeownership status:	
I own/part-own the place where I live	93
I own/part-own another residential property in New Zealand	16
I am a tenant/boarder where I currently live, paying rent/board	4
I do not own my current place of residence, and I do not pay either rent/board	1
Other	0
Total	**
Age:	
18-34	17
35-49	31
50-64	25
65+	27
Total	100
Gender:	
Male	44
Female	55
Gender diverse	0
Would prefer not to say	0
Total	100
Ethnicity:	
New Zealand European (or Pakeha)	74
Māori	9
Pasifika (Samoan, Cook Island Māori, Tongan, Niuean)	2
Chinese	5
Indian	5
Another ethnic group	11
Total	**
Educational status:	
Secondary/high school qualification	19
Trade qualification	11
Tertiary certificate/diploma	20
Bachelor's degree (or equivalent)	29
Post-graduate degree or higher	18
Other	1
No qualification	3
Total	**

Continued

Table 108: Respondent profile – End-users (continued)

	End-users
Base =	1001
	%
Employment status:	
I am an employer	5
I am self-employed	9
I am an employee, earning a wage or salary	51
I am a full-time homemaker or renovator	6
I am a student	0
I am unemployed	2
I am retired	23
I receive a benefit or government support payments	2
Other	1
Total	100
Household structure:	
Single person household	13
Single parent with child/children	6
Couple with no children	35
Couple with child/children	40
Other	5
Would prefer not to say	1
Total	100
Personal income (n=244):	
$20,000 or less	7
$20,001-$40,000	30
$40,001-$60,000	22
$60,001-$80,000	9
$80,001-$100,000	9
$100,001-$120,000	4
$120,001-$140,000	4
More than $140,001	3
Don't know	2
Would prefer not to say	10
Total	100

Continued

Table 108: Respondent profile – End-users (continued)

	End-users
Base =	1001
	%
Combined/Household income (n=784):	
$20,000 or less	1
$20,001-$40,000	9
$40,001-$60,000	13
$60,001-$80,000	12
$80,001-$100,000	15
$100,001-$120,000	13
$120,001-$140,000	9
More than $140,001	19
Don't know	1
Would prefer not to say	9
Total	100
Region live in:	
Northland	3
Auckland	27
Waikato	10
Bay of Plenty	5
Gisborne	1
Hawke's Bay	4
Taranaki	2
Manawatū	4
Whanganui	2
Wairarapa	2
Wellington	11
Tasman	1
Nelson	2
Marlborough	1
West Coast	0
Canterbury	18
Otago	5
Southland	2
Total	**
Urbanicity:	
Large city	59
Small town	29
Or rural area	11
Total	**

Continued

Table 108: Respondent profile – End-users (continued)

	End-users
Base =	1001
	%
Born in New Zealand:	
Born in New Zealand	72
Born overseas	28
Total	100
Years lived in New Zealand:	
Less than 5 years	1
5-10 years	5
11-20 years	10
21-30 years	8
31 years or more	14
All my life	63
Don't know	0
Total	**
Residency status:	
I am a NZ citizen/NZ permanent resident	98
I am a resident visa holder	2
I am a temporary visa holder	0
Total	100

Continued

Table 108: Respondent profile – End-users (continued)

	End-users
Base =	1001
	%
Works commenced in the last 12 months:	
Building a new house/townhouse/apartment/unit	10
Major renovations (e.g., structural changes)	15
Minor renovations (e.g., fixing faulty parts)	54
Landscaping/outdoor work	43
Interior/exterior painting and decorating	39
Other	1
No building work/renovations completed/started in	15
Total	**
Works delayed in the last 12 months:	
Building a new house/townhouse/apartment/unit	8
Major renovations (e.g., structural changes)	18
Minor renovations (e.g., fixing faulty parts)	33
Landscaping/outdoor work	16
Interior/exterior painting and decorating	15
Other	1
No building work/renovations delayed in the last 12 months	40
Total	**
Works planned in the last 12 months:	
Building a new house/townhouse/apartment/unit	11
Major renovations (e.g., structural changes)	19
Minor renovations (e.g., fixing faulty parts)	61
Landscaping/outdoor work	35
Interior/exterior painting and decorating	35
Other	1
No building work/renovations planned	8
Total	**

** Total may exceed 100% because of multiple responses.

Te Kāwanatanga o Aotearoa
New Zealand Government

DDI 8955