

TE MAURI O ŌTAUTAHI

The Pulse Of Christchurch 2022

Te Mauri O Ōtautahi (the Pulse of Christchurch) is a research project that Research First runs every year with residents, businesses, and youth across Greater Christchurch. By combining the insights from these surveys with the rest of the research we do across the city, Research First is able to create a valuable and unique insight into what is happening across the city. The 2022 Pulse draws its key themes from across 100 research projects Research First has conducted in the Greater Christchurch area in the last year (comprising tens of thousands of surveys with residents and stakeholders). As a company with its head office here, Research First is profoundly invested in what happens here.

To find out more about the Pulse of Christchurch Research, or to see how Research First can help you find out about your own customers and stakeholders, contact:

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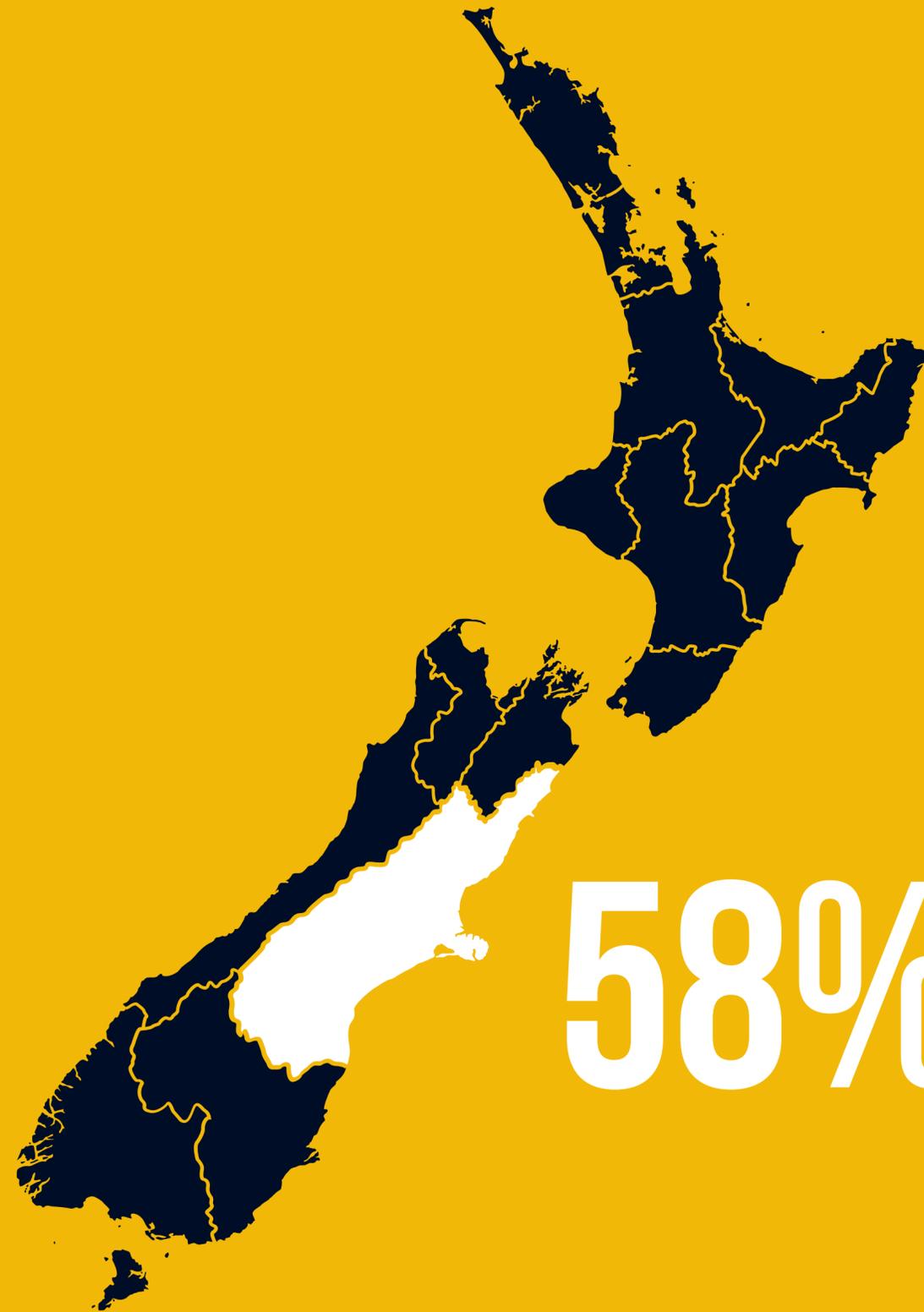


The Earthquake Legacy Lingers

TAKEAWAY ONE

We've been doing these Pulse presentations for a number of years and we're keen to move beyond talking about Christchurch 'rebuilding' or 'recovering'. We welcome the opportunity to talk about what is in front of us rather than what is behind us. Given this, we were pleased when – in a survey of 650 Y11-Y13 students from outside of Chch - only 1% associated Chch with earthquakes. When we first started doing this work, the earthquakes were the number one association students made with Chch, with over one quarter of the students surveyed mentioning it unprompted. So this decline from 25%+ to 1% seems to indicate something important about how those outside of our city are starting to think about Christchurch.

But when we asked this same question of the residents and businesses in Feb, 58% of residents and 51% of businesses said they thought the earthquake story was still 'very relevant' to life in Chch today. To put this in perspective, 14% of the people we surveyed in Feb weren't even living in Chch at the time of either earthquake.



1% Students
elsewhere

58% Residents
here

Unfinished Things Attract More Attention Than Finished Ones

TAKEAWAY TWO

The social media monitoring we do shows that it is the unfinished things in the city that attract attention (such as incomplete buildings, damage, empty spaces etc.). Given how much has been achieved since the earthquakes, this may seem bizarre. But it can be explained by what psychologists call The Zeigarnik effect. This describes the tendency to remember interrupted or incomplete tasks or events more easily than tasks that have been completed.

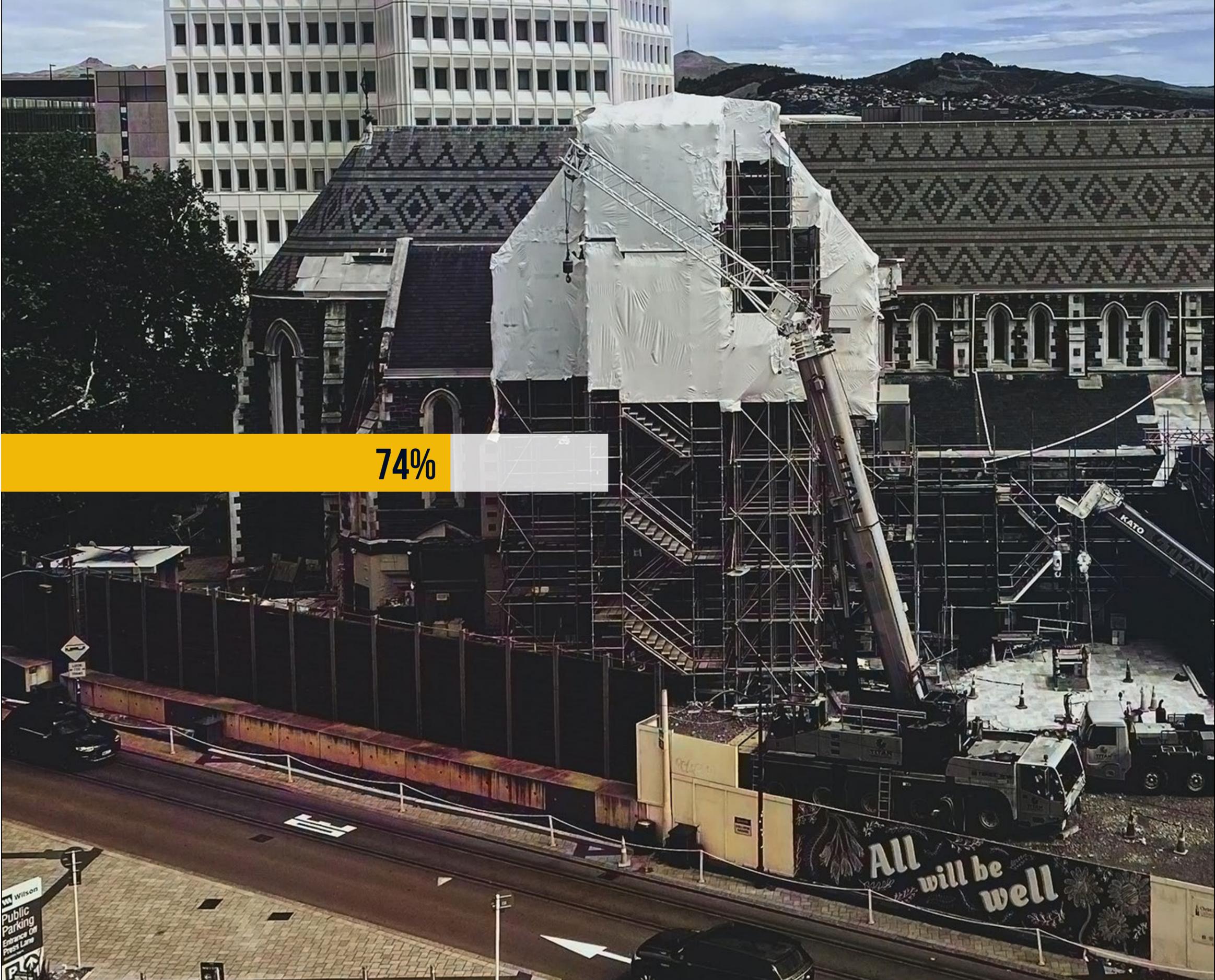


ZEIGARNIK EFFECT

The Anglican Cathedral Is About The Heart Of The City

TAKEAWAY THREE

In a survey Research First completed with 400 Greater Christchurch residents in late 2021 74% said they thought the Anglican Cathedral was an essential part of the story of Christchurch. And more than 75% said that in the absence of the Anglican Cathedral, the city lacked a clearly defined centre or heart.



We're Getting A Lot Right

TAKEAWAY FOUR

In the 2022 Pulse survey a majority of residents believed the city is developing in a way that restores and enhances the natural environment (50%). In the separate youth survey fully 45% of the respondents thought Christchurch was a city for young people, and half of them thought it will be a good place to get a job when they finish their education.



50%

Development
enhances

45%

A city for
young people

It's Not Earthquakes Or Pandemics That Worry Us: It's Housing

TAKEAWAY FIVE

The two biggest concerns for residents in Feb 2022 were the price of houses and the cost of living. Both of these were significantly ahead of worries about the pandemic or recovering from the earthquakes. The business owners put housing first and cost of living second too but they were much more worried than residents about the local economy. In both samples we found over 70% identifying housing as the number one issue. To understand how residents felt about housing precariousness we asked them how confident they were that they could buy their current house if they were in the market today. 40% said they were 'not all confident' they could afford it and another 20% said they were 'fairly unconfident'.



It's Not Clear How You Solve Housing Affordability

TAKEAWAY SIX

50% of the residents surveyed did not think house prices in Chch were 'fair and reasonable'. Of more concern, 61% of residents and 65% of business owners agreed that at the moment in Chch lower prices means lower quality housing.

What neither group could agree on is what might be done about this. For instance, in both populations there was a pretty even split in favour of and against higher density residential developments (37% residents against, 40% for; 39% business owners against, 42% for).

This concern with housing is also prominent in our social media monitoring, with a clear split between those who see intensification as the way to address supply and prices, and those who see it as undermining the character of the city



50%

**House prices
are not fair and
reasonable**

61%

**Lower prices
mean lower
quality**

37%

**Against higher
density**

Businesses Remain Pessimistic About Chch As A Place To Do Business

TAKEAWAY SEVEN

A common theme in our previous years' research is that business owners and operators are pessimistic about Chch as a place to do business. When we asked them whether they would recommend Chch as a place that someone should start a new business, the net promoter score in 2020 was -46. In 2021 it 'improved' to -42. But in 2022 it's back at -48. The score is slightly better for recommending someone move an established business here, which nets to -28 (but is still a very low score).

Certainly the pandemic and our response to it has coloured these sentiments but few business owners and operators believe 'there is a clear vision for business development within Christchurch'. Only a minority of residents and business owners thought there was such a vision (20% and 22%) and these were outweighed by the 31% and 34% who did not think there was.

Similarly, only around a third of both populations (31% residents and 35% businesses) agreed that Chch supported innovators and entrepreneurs.

Despite all this pessimism, the majority of residents and businesses agreed that this was an attractive place to work (83% for both).



-48%

**A good place to start
a new business**

-28%

**A good place to
move an established
business**

20%

**There is a clear
vision for business
development within
Christchurch**

We Have Great Neighbourhoods, But Have We Forgotten How To Build Them?

TAKEAWAY EIGHT

The people in Christchurch rate their own neighbourhoods highly, with a a NPS of +36. But they particularly like the older neighbourhoods – Beckenham, Sumner, Merivale, and Lyttleton. Residents like walkable neighbourhoods with amenities close at hand, where they know their neighbours, and where they feel safe.



+36

Loneliness And Social Isolation Is A Problem For Many

TAKEAWAY NINE

In one survey we did 86% of the respondents thought the earthquakes created wellbeing and mental health issues that haven't yet been resolved. Certainly over the previous decade there has been a significant increase in the number of people accessing mental health services in Canterbury. It's possible that this is a result of better reporting or changing attitudes toward mental health issues but we're not so sure. When we ask residents about their general wellbeing, the picture is mixed. Only about half said they wake up feeling fresh and rested and about two thirds say their daily life is filled with things that interest them. Interestingly, these are essentially the same proportions we see in our nationwide surveys. Which is both good and disturbing as it suggests that life is no more restful or interesting here than anywhere else.

In 2021 a quarter of the respondents in another of our surveys said there was no-one they felt comfortable talking to about intimate personal problems and that proportion holds for 2022. This is also the same proportion we see nationwide. Similarly in 2021 20% of Chch residents said there was no one in their life they could turn to for advice about making important decisions. In 2022 this had improved to 15%, which is closer to the nationwide average we see.

But this still means a notable minority of the city's residents who say they are lonely and isolated. We've said it before and we'll say it again: This notion of social isolation isn't just a personal calamity, it is also a public health disaster. And it's one that will likely only get worse as our population ages and single person households increase.



25%

no-one they felt comfortable talking to about intimate personal problems

15%

no-one in their life they could turn to for advice about making important decisions

Be Kinder To Christchurch City Council

TAKEAWAY TEN

When we ask residents and businesses ‘who do you think is responsible for making decisions about Chch’s future?’, CCC dominates: The elected members of the Council are mentioned most often. In second place is the staff at CCC, and also in the top 5 is the Mayor (the others in that top 5 are central govt and the residents / voters). That means that CCC, in one form or another, dominates perceptions of who’s in charge, regardless of where the decision rights and decision-making authority lies. That’s a tough burden for one organisation to carry.



Confidence In City Leaders Is Up. But It's Not Clear Where We Are Headed

TAKEAWAY ELEVEN

The proportion of residents who think the city leaders are taking us in the right direction has increased. In 2022 40% think they are taking us in the right direction (compared to 35% who say they are not). Residents were also more likely to say they trusted the city leaders to do the right thing for the city and its communities (44%). But residents are much more confident in this regard than businesses (40% vs 26%) and (44% vs 23%) and, as in previous years, 42% of residents didn't think that decisions about the city followed a clear strategy and direction for Christchurch's future. In our nationwide research 44% of residents didn't think that decisions about their area followed a clear strategy and direction for its future. So we're no worse than the rest of the country, but we're no better either.



40%
The city leaders
are taking us in the
right direction

Chch Remains A Deeply Divided City

TAKEAWAY TWELVE

In previous years we have argued that our research reveals a tale of two cities. That is, our research reveals a deeply divided city where competing narratives about how Christchurch is doing are both true. For instance, while the city does better in terms of advocacy and comparative amenity now, we still see more residents saying the city was in better shape before the earthquakes than in 2021. And 20% of the residents are still in the 'detractor' category. This means they are not only not promoting the city to others but likely actually discouraging them from considering living here.

In 2022 we think that this 'tale of two cities' doesn't go far enough and that the diffusion of innovation curve is a more useful metaphor for what is happening around us. We know there is a subset of Chch residents and businesses who are enthusiastic supporters (and we similarly know there are those who feel left out or left behind at the other end of the curve).

If this is true, then it means all of us invested in the city's future have three challenges – how to amplify the advocates, how to wrap our arms around those who feel left behind, and how to make sure those in the middle move to the front not the back of the curve.

But it also means we should all pay more attention to the so called 'chasm'. Because in the diffusion of innovation literature, this notion of a chasm is a way of arguing that those on one side of this gap have very different expectations from the rest. And that the messages and stories that work for one group will not work for the others.

A TALE OF TWO CITIES

