

Tuesday, 5 August 2025

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New Zealand: In July, National and Labour tied at 31%; National-led Government retains clear lead

Roy Morgan's New Zealand Poll for July 2025 shows the National-led Government (National, ACT & NZ First) virtually unchanged on 51% (down 0.5% points) and the Labour-Greens-Maori Party Parliamentary Opposition on 46% (up 1.5% points).

For the tenth straight month neither major party has managed to secure a third of the vote. Within the National-led Government support for National was down 1% point to 31%, support for ACT was down 1% point to 10.5% and support for NZ First increased 1.5% points to 9.5% - the highest support for NZ First since the last New Zealand Election.

For the Parliamentary Opposition, support for Labour was up 2.5% points to 31%, support for the Greens increased 0.5% points to 11.5%, and support for the Māori Party dropped 1.5% to 3.5%.

A further 3% (down 1% point) of electors supported a minor party outside Parliament. This includes 1% (down 2% points) who support The Opportunities Party (T.O.P.) and a further 2% (up 1% point) who support other minor parties including the New Conservatives, NewZeal, NZ Outdoors, the Freedom Party and the Aotearoa Legalise Cannabis Party.

National/ ACT/ NZ First would win a majority of 63 seats in a 120 seat Parliament

The survey results for July would lead to 63 seats (down five seats from the election) being won by the National/ ACT/ NZ First governing coalition compared to 57 seats (up two seats) for the current Labour/ Greens/ Maori Party Parliamentary Opposition.

For the governing coalition National's support would win 38 seats (down 11 seats from the election), support for ACT would equal 13 seats (up two seats) and NZ First would win 12 seats (up four seats).

For the three Opposition parties Labour's support would secure 38 seats (up four seats), Greens support would mean 14 seats (down one seat) and the Maori Party would win five seats (down one seat).

This latest New Zealand Roy Morgan Poll on voting intention was conducted by telephone – both landline and mobile – with a New Zealand-wide cross-section of 832 electors from June 30 – July 27, 2025. Electors were asked: "If a New Zealand Election were held today which party would receive your party vote?" Of all electors surveyed 2.5% (down 0.5% points) did not name a party.

New Zealand Government Confidence Rating dropped 11.5pts to 83.5 in July

The Roy Morgan Government Confidence Rating dropped 11.5pts to 83.5 in July. Now a majority of 53.5% (up 7.5% points) of electors say New Zealand is 'heading in the wrong direction' compared to only 37% (down 4% points) who said New Zealand is 'heading in the right direction'.

The ANZ-Roy Morgan Consumer Confidence Rating for New Zealand dropped 4.1pts to 94.7 in July and is 4 points above the Consumer Confidence figure in Australia of 90.6 on July 28 – August 3, 2025.

Age gap opens up with older women and men favouring the National/ ACT/ NZ First governing coalition while younger women and men favour the Labour/ Greens/ Māori Opposition

A clear age gap has opened up alongside the 'gender split' in July. The long-standing 'gender gap' shows a majority of 58% of men favouring the National/ ACT/ NZ First coalition government compared to 40% supporting the opposition Labour/ Greens/ Maori Party. This gender gap is entirely driven by men over 50.

A large majority of 69% of men aged over 50 support the National/ ACT/ NZ First governing coalition compared to only 30.5% supporting the opposition Labour/ Greens/ Māori Party – a gap of 38.5% points. Support for right-wing governing partners ACT (20%) and NZ First (12%) is higher amongst this demographic than any other age or gender group analysed.

However, younger men aged 18-49 narrowly favour the Parliamentary Opposition Labour/ Greens/ Māori Party on 50.5% compared to 46% that support the National-led governing coalition. Support for Labour (35%) is higher amongst this demographic than any other age or gender group analysed.

In contrast, on an overall basis women remain in favour of the opposition Labour/ Greens/ Māori on 51.5% - ahead of the governing National/ ACT/ NZ First on 45% - and this is entirely driven by younger women aged 18-49. A large majority of younger women support the Parliamentary Opposition Labour/ Greens/ Māori Party on 63.5%, nearly double the support of the National/ ACT/ NZ First governing coalition on only 33%. Support for the Greens (26.5%) and the Māori Party (6.5%) is higher amongst this group than any other gender and age group analysed.

In contrast, older women aged 50+ are clearly in favour of the National/ ACT/ NZ First governing coalition on 55% well ahead of the Opposition Labour/ Greens/ Māori Party on 41.5%. The combined support for the two major parties, National (37%) and Labour (34%) at a total of 71% is higher amongst this group than any other gender and age group analysed.

Party vote analysis by Gender & Age

	2023	July		Women			Men			
	NZ Election	<u>2025</u>	<u>All</u>	<u>18-49</u>	<u>50+</u>	<u>All</u>	<u>18-49</u>	<u>50+</u>		
	%	%	%	%	%	%	%	%		
National	38.1	31	31	23.5	37	31	24.5	37		
ACT	8.6	10.5	5.5	1	9.5	16	12	20		
NZ First	6.1	9.5	8.5	8.5	8.5	11	9.5	12		
National/ ACT/ NZ First	52.8	51	45	33	55	58	46	69		
Labour	26.9	31	32.5	30.5	34	29.5	35	24		
Greens	11.6	11.5	14	26.5	3.5	9	14.5	4.5		
Māori Party	3.1	3.5	5	6.5	4	1.5	1	2		
Labour/ Greens/ Māori Party	41.6	46	51.5	63.5	41.5	40	50.5	30.5		
Others	5.6	3	3.5	3.5	3.5	2	3.5	0.5		
Total	100	100	100	100	100	100	100	100		
Roy Morgan Government Co	nfidence Ratinç	9								

Right Direction	31	37	35.5	32	39	38.5	34.5	43
Wrong Direction	57.5	53.5	57	63	51	50	50	50
Government Confidence Rating	73.5	83.5	78.5	69	88	88.5	84.5	93
Can't say	11.5	9.5	7.5	5	10	11.5	15.5	7
Total	100	100	100	100	100	100	100	100

^{*}The Roy Morgan Government Confidence Rating is 100 plus the difference between the percentage of Kiwis who say the country is "heading in the right direction" and the percentage who say the country is "seriously heading in the wrong direction".

Government Confidence Rating is below the neutral level of 100 for all gender and age groups

The Roy Morgan New Zealand Government Confidence Rating decreased significantly in July 2025, down 11.5pts to 83.5.

A bare majority of men, 50% (up 13% points) say New Zealand is 'heading in the wrong direction' compared to 38.5% (down 10.5% points) that say the country is 'heading in the right direction' – a Government Confidence Rating of only 88.5 (down 23.5pts). The decrease in Government Confidence for men in July was broad-based. Government Confidence for younger men aged 18-49 dropped 24.5pts to 84.5 and for older men aged 50+ down by 22.5pts to 93.

Among women now a majority of 57% (up 2% points) say 'New Zealand is 'heading in the wrong direction', while 35.5% (up 2% points) say New Zealand is 'heading in the right direction' – a Government Confidence Rating of 78.5 (unchanged). The Government Confidence Rating for women aged 18-49 dropped 4.5 points to 69 and the lowest of any gender and age group analysed, while the Government Confidence Rating for women aged 50+ increased by 4 points to 88.

Michele Levine, CEO Roy Morgan, says the National-led Government has maintained a clear lead over the Parliamentary Opposition for a fourth straight month in July:

"Support for the National-led Government (National, ACT, NZ First) was virtually unchanged in July at 51% and remaining clearly ahead of the Parliamentary Opposition (Labour Party, Greens, Maori Party) on 46% (up 1.5% points) – a gap of 5% points.

"However, the fractured nature of politics in New Zealand continues with neither major party mustering a third of the electorate's support for a tenth straight month. Both National (31%) and Labour (31%) are unable to capture a significant share of public support.

"If a New Zealand Election were held now these support levels would result in 63 seats for the National-led Government and 57 seats for the Labour-led Parliamentary Opposition – a majority of six seats in the 120 seat Parliament – depending on any potential 'overhang seats' that may occur if a party won seats without gaining at least 5% support at the election.

"Support for the National-led Government has averaged 51% for the past three months following three interest rate cuts by the Reserve Bank of New Zealand (RBNZ) earlier this year – slashing interest rates from 4.25% in January to 3.25% today.

"However, at the RBNZ's latest meeting in early July the RBNZ decided to leave interest rates unchanged. Both the Roy Morgan New Zealand Government Confidence Rating, down 11.5pts to 83.5, and the <u>ANZ-Roy Morgan New Zealand Consumer Confidence, down 4.1pts to 94.7</u>, subsequently dropped in July.

"There is now a clear age split between how younger and older voters view the political situation. The National-led Government is heavily favoured over the Labour-led Parliamentary Opposition by men aged 50+ (69% cf. 30.5%) and women aged 50+ (55% cf. 41.5%).

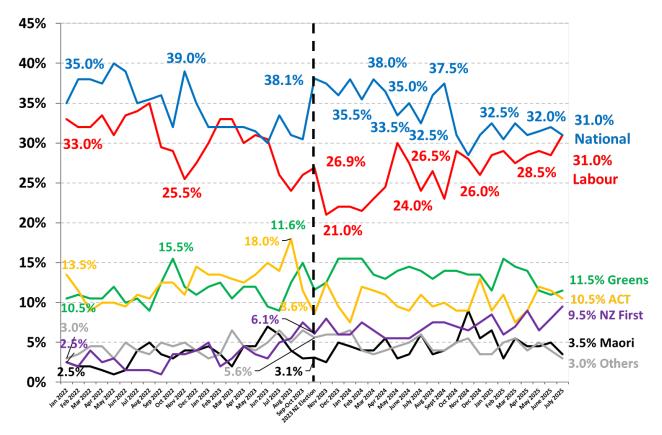
"In contrast, younger New Zealanders aged 18-49 clearly favour the Labour-led Parliamentary Opposition over the National-led Government. Younger women aged 18-49 favour the Opposition by a wide margin (63.5% cf. 33%) while younger men are narrowly in favour (50.5% cf. 46%).

"For the Labour-led Parliamentary Opposition to win next year's election the parties of the left will need to find a way to broaden their appeal to older voters aged 50+."

For comments or more information about Roy Morgan's New Zealand Voting Data and profiles of supporters of Labour, National and other parties, please contact:

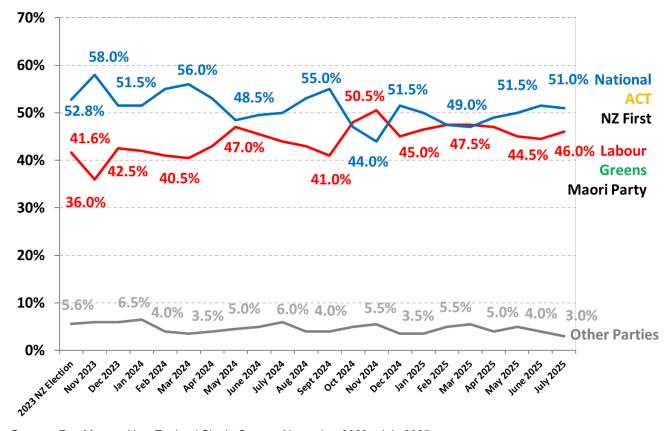
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New Zealand Party Vote: 2022-25



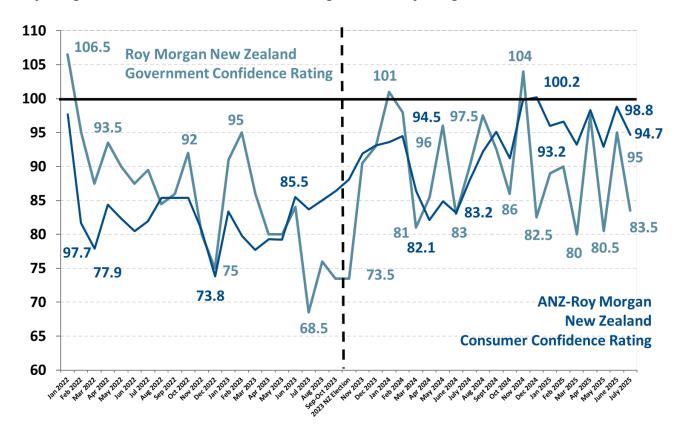
Source: Roy Morgan New Zealand Single Source. January 2022 – July 2025. **Base**: New Zealand electors aged 18+. Average interviews per month – 928.

New Zealand Party Vote: NZ Govt. v Parliamentary Opposition



Source: Roy Morgan New Zealand Single Source. November 2023 - July 2025. **Base**: New Zealand electors aged 18+. Average interviews per month – 892.

Roy Morgan NZ Government Confidence Rating vs. ANZ-Roy Morgan NZ Consumer Confidence



Source: Roy Morgan New Zealand Single Source. January 2022 – July 2025. **Base**: New Zealand electors aged 18+. Average interviews per month – 928.

Two-Party Preferred: National-led Government vs. Parliamentary Opposition Parties

National-led Government (National, ACT & NZ First)

Parliamentary Opposition Parties (Labour, Greens & Maori Party)

NZ Election, October 14, 2023* 52.80 41.59

ROY MORGAN NEW ZEALAND POLL

National wins the NZ Election and signs a governing coalition agreement with ACT and NZ First on Friday November 24, 2023

December 2023	51.5	42.5
2024		
January 2024	51.5	42
February 2024	55	41
March 2024	56	40.5
April 2024	53	43
May 2024	48.5	47
June 2024	49.5	45.5
July 2024	50	44
August 2024	53	43
September 2024	55	41
October 2024	47	48
November 2024	44	50.5
December 2024	51.5	45
2025		
January 2025	50	46.5
February 2025	47.5	47.5
March 2025	47	47.5
April 2025	49	47
May 2025	50	45
June 2025	51.5	44.5
July 2025	51	46

^{*}At the 2023 NZ Election the National party secured 38.08% of the vote and needed the support of ACT (8.64%) and NZ First (6.08%) to secure a governing coalition with a majority of seats in the Parliament. There were three Parties elected to Parliament not in Government including Labour (26.91%), Greens (11.6%) and the Maori Party (3.08%).

Voting Intention Summary

The following table compares the latest New Zealand Roy Morgan Polls on Voting Intention with the result from the October 14, 2023, General Election:

National-led Governments (& supporting parties) are highlighted in Blue. Labour-led Governments (& supporting parties) are highlighted in Red.

PARTY VOTE	<u>National</u>	<u>ACT</u>	NZ <u>First</u>	<u>Labour</u>	Green <u>Party</u> *	Maori <u>Party</u> **	<u>TOP</u> **	<u>Other</u>
ELECTIONS	%	%	%	%	%	%	%	%
October 12, 1996*	33.87	6.10	13.35	28.19	10.10	n/a	n/a	8.39
November 27, 1999	30.50	7.04	4.26	38.74	5.16	n/a	n/a	14.30
July 27, 2002	20.93	7.14	10.38	41.26	7.00	n/a	n/a	13.29
September 17, 2005	39.10	1.51	5.72	41.10	5.30	2.12	n/a	5.15
November 8, 2008	44.93	3.65	4.07	33.99	6.72	2.39	n/a	4.25
November 26, 2011	47.31	1.07	6.59	27.48	11.06	1.43	n/a	5.06
September 20, 2014	47.04	0.69	8.66	25.13	10.70	1.32	n/a	6.46
September 23, 2017	44.45	0.50	7.20	36.89	6.27	1.18	2.44	1.07
October 17, 2020	25.58	7.59	2.60	50.01	7.86	1.17	1.51	3.70
October 14, 2023	38.08	8.64	6.08	26.91	11.60	3.08	2.22	3.35
ROY MORGAN POLL				•				
2023								
November 2023	37.5	12.5	8	21	12.5	2.5	3.5	2.5
December 2023	36	9.5	6	22	15.5	5	4	2
2024								
January 2024	38	7.5	6	22	15.5	4.5	4.5	2
February 2024	35.5	12	7.5	21.5	15.5	4	2.5	1.5
March 2024	38	11.5	6.5	23	13.5	4	2.5	1
April 2024	36.5	11	5.5	24.5	13	5.5	2	2
May 2024	33.5	9.5	5.5	30	14	3	3	1.5
June 2024	35	9	5.5	27.5	14.5	3.5	2.5	2.5
July 2024	32.5	11	6.5	24	14	6	4.5	1.5
August 2024	36	9.5	7.5	26.5	13	3.5	2.5	1.5
September 2024	37.5	10	7.5	23	14	4	2.5	1.5
October 2024	31	9	7	29	14	5	2	3
November 2024	28.5	9	6.5	28	13.5	9	3.5	2
December 2024	31	13	7.5	26	13.5	5.5	1	2.5
2025								
January 2025	32.5	9	8.5	28.5	11.5	6.5	1.5	2
February 2025	30.5	11	6	29	15.5	3	2.5	2.5
March 2025	32.5	7.5	7	27.5	14.5	5.5	4	1.5
April 2025	31	9	9	28.5	14	4.5	2.5	1.5
May 2025	31.5	12	6.5	29	11.5	4.5	3	2
June 2025	32	11.5	8	28.5	11	5	3	1
July 2025	31	10.5	9.5	31	11.5	3.5	1	2

^{*}The 1996 Election was the first New Zealand Election contested via MMP (Mixed Member Proportional). At the 1996 Election the Greens Party contested as part of the "Alliance" political grouping with four other political parties. **The Maori Party was launched in July 2004. The Opportunities Party (TOP) was launched in November 2016.

Roy Morgan New Zealand Seat Predictor

The following table compares the projected seats to be won by the various New Zealand political parties based on the latest New Zealand Roy Morgan Polls on Voting Intention with the results from previous MMP Elections:

National-led Governments (& supporting parties) are highlighted in Blue. Labour-led Governments (& supporting parties) are highlighted in Red.

SEAT COUNT ELECTIONS	National %	ACT %	NZ <u>First</u> %	<u>Labour</u> %	Green <u>Party</u> * %	Maori <u>Party</u> ** %	Other %
October 12, 1996*	44	8	17	37	0	0	14*
November 27, 1999	39	9	5	49	7	0	11*
July 27, 2002	27	9	13	52	9	0	10*
September 17, 2005	48	2	7	50	6	4	4*
November 8, 2008	58	5	0	43	9	5	2*
November 26, 2011	59	1	8	34	14	3	2*
September 20, 2014	60	1	11	32	14	2	1*
September 23, 2017	56	1	9	46	8	0	0
October 17, 2020	33	10	0	65	10	2	0
October 14, 2023	49	11	8	34	15	6	0
ROY MORGAN SEAT PREDICTOR							
November 2023	48	16	10	27	16	5	0
December 2023	46	12	8	28	20	8	0
2024							
January 2024	49	10	7	28	20	6	0
February 2024	45	15	9	27	19	5	0
March 2024	47	14	8	29	17	5	0
April 2024	45	14	7	31	16	7	0
May 2024	42	12	7	38	17	4	0
June 2024	44	11	7	35	18	5	0
July 2024	41	14	8	31	18	8	0
August 2024	45	12	9	33	16	5	0
September 2024	47	13	9	29	17	5	0
October 2024	39	11	9	37	18	6	0
November 2024	37	11	8	36	17	11	0
December 2024	39	16	9	32	17	7	0
2025							
January 2025	40	11	11	36	14	8	0
February 2025	39	14	7	37	19	4	0
March 2025	41	10	9	35	18	7	0
April 2025	39	11	11	36	17	6	0
May 2025	40	15	8	37	14	6	0
June 2025	40	14	10	36	14	6	0
July 2025	38	13	12	38	14	5	0

*Other seats won at elections from 1996 - 2014 include: 1996 - 14 seats: Alliance (13 seats) & United NZ (1 seat); 1999 - 11 seats: Alliance (10 seats) & United NZ (1 seat); 2002 - 10 seats: United Future (8 seats) & Progressive (2 seats); 2005 - 4 seats: United Future (3 seats) & Progressive (1 seat); 2008 - 2 seats: Progressive (1 seat) & United Future (1 seat); 2011 - 2 seats: United Future (1 seat) & Mana Party (1 seat); 2014 - 1 seat: United Future (1 seat).

Fourth National Government (1990 – 1999): 1996 NZ Election: National (44 seats) wins the NZ Election and governs in coalition with NZ First (17 seats) for a total of 61 seats in the 120 seat Parliament.

Fifth Labour Government (1999-2008): 1999 NZ Election: Labour (49 seats) wins the NZ Election and governs in coalition with Alliance (10 seats) and the support of the Greens (7 seats) for a total of 66 seats in the 120 seat Parliament. 2002 NZ Election: Labour (52 seats) wins the NZ Election and governs in coalition with the Progressive Coalition (2 seats) and confidence and supply from United Future (8 seats) for a total of 62 seats in the 120 seat Parliament. 2005 NZ Election: Labour (50 seats) wins the NZ Election and governs in coalition with the Progressive Coalition (1 seat) and confidence and supply from New Zealand First (7 seats) and United Future (3 seats) for a total of 61 seats in the 121 seat Parliament (including 1 'overhang' seat).

Fifth National Government (2008-2017): 2008 NZ Election: National (58 seats) wins the NZ Election and governs with the confidence and supply of ACT (5 seats), the Maori Party (5 seats) and United Future (1 seat) for a total of 69 seats in the 122 seat Parliament (including 2 'overhang' seats). 2011 NZ Election: National (59 seats) wins the NZ Election and governs with the confidence and supply of Maori Party (3 seats), ACT (1 seat) and United Future (1 seat) for a total of 64 seats in the 121 seat Parliament (including 1 'overhang' seat). ACT (1 seat) and United Future (1 seat) for a total of 64 seats in the 121 seat Parliament (including 1 'overhang' seat).

Sixth Labour Government (2017-2023): 2017 NZ Election: Labour (46 seats) 'wins' the NZ Election and governs in coalition with NZ First (9 seats) and the confidence and supply of the Greens (8 seats) for a total of 63 seats in the 120 seat Parliament. 2020 NZ Election: Labour (65 seats) wins the NZ Election and governs with the cooperation of the Greens (10 seats) for a total of 75 seats in the 120 seat Parliament.

Sixth National Government (2023-?): 2023 NZ Election: National (48 seats) 'wins' the NZ Election and governs in coalition with ACT (16 seats) and NZ First (10 seats) for a total of 74 seats in the 123 seat Parliament.

NEW ZEALAND: HEADING IN "RIGHT" OR "WRONG" DIRECTION?

Electors were asked: "Generally speaking, do you feel that things in New Zealand are heading in the right direction or would you say things are seriously heading in the wrong direction?"

N7 Roy Morgan	Government	Confidence Ra	nting: Interviewing	Dates (Lah	our Party Goyt.)
INE INDIVIDUE ALL	OUVEILING	COILLIACTICE INC	ICITIES TITICEI VIC VVIITE	Lates itab	Out I alte Govt.

	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep-Oct
	2022	<u>2022</u>	<u>2022</u>	<u>2022</u>	2022	2022	<u>2022</u>	<u>2022</u>	<u>2023</u>	2023	<u>2023</u>						
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Right direction	40	39	40.5	37.5	37.5	42	35	32	40	42.5	38.5	35	34.5	38	29	32	31
Wrong direction	50	51.5	51	53	51.5	50	55	57	49	47.5	52.5	55	54.5	54	60.5	56	57.5
Roy Morgan GCR#	90	87.5	89.5	84.5	86	92	80	75	91	95	86	80	80	84	68.5	76	73.5
Can't say	10	9.5	8.5	9.5	11	8	10	11	11	10	9	10	11	8	10.5	12	11.5
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

NZ Roy Morgan Government Confidence Rating: Interviewing Dates (National from Nov. 2023)

	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb
	<u>2023</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>	<u>2025</u>											
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Right direction	36.5	38	42	41.5	35	34.5	43	35.5	38	43	39	36.5	46.5	35	37.5	39
Wrong direction	46	45	41	43.5	54	49	47	52.5	48	45.5	46.5	50.5	42.5	52.5	48.5	49
Roy Morgan GCR#	90.5	93	101	98	81	85.5	96	83	90	97.5	92.5	86	104	82.5	89	90
Can't say	17.5	17	17	15	11	16.5	10	12	14	11.5	14.5	13	11	12.5	14	12
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

NZ Roy Morgan Government Confidence Rating: Interviewing Dates (National Party Govt.)

			,													
	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
	<u>2025</u>	<u>2026</u>	<u>2026</u>	<u>2026</u>	<u> 2026</u>	<u>2026</u>	<u> 2026</u>									
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Right direction	32.5	40.5	35	41	37											
Wrong direction	52.5	43	54.5	46	53.5											
Roy Morgan GCR#	80	97.5	80.5	95	83.5											
Can't say	15	13.5	10.5	13	9.5											
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

#Roy Morgan GCR = Roy Morgan Government Confidence Rating (The Roy Morgan GCR is 100 plus the difference between the percentage of Kiwis who say the country is "heading in the right direction" and the percentage who say the country is "seriously heading in the wrong direction").

The Roy Morgan Poll is conducted by the **ONLY** Australian and NZ member of the Gallup International Association.

No other public opinion poll taken in Australia or New Zealand has this qualification.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. The following table gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. The figures are approximate and for general guidance only and assume a simple random sample. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Comple Ci-e		Percentage	Percentage Estimate								
Sample Size	40%-60%	25% or 75%	10% or 90%	5% or 95%							
1,000	±3.2	±2.7	±1.9	±1.4							
1,500	±2.6	±2.2	±1.5	±1.1							