

Temporary migrant worker exploitation research programme: quantitative findings

WAVE 2 2023

Updated version 24 November, 2023

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Research purpose



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Research purpose

MBIE is leading part of a Government initiative to address temporary migrant worker exploitation in New Zealand.

In 2021, MBIE commissioned Kantar Public to carry out baseline qualitative and quantitative research to segment and understand the temporary migrant worker population and employers who hire and potentially exploit these migrants. Prioritising audiences and shifting employer attitudes and behaviours will be key to the success of the overall initiative.

Action already underway to reduce exploitation includes a new visa to support migrants to leave exploitative situations quickly and remain lawfully in NZ, a new dedicated 0800 number and web form to make it easier to report migrant worker exploitation, and the establishment of early intervention and community support teams.

These changes are supported by information and education to ensure migrant workers and employers understand their rights and obligations.

The 2023 research programme delivers quantitative insights into both worker and employer mindsets. The research serves three key purposes:

- 1) To assess any changes in perceptions since the 2021 baseline measures.
- 2) To apply the segmentations developed in 2021 to the broader employment market groups of workers and employers.
- 3) To incorporate new areas of interest to MBIE, e.g. Māori workers within the broader benchmark worker group and new immigration visas.

This report presents the 2023 research findings with comparisons made to the 2021 survey where appropriate. Note, analysis of Māori workers in the broader employment market are provided in a separate infographic summary.

Summary



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Workers summary: Key findings for 2023

1 Since 2021, the size of the migrant worker *Capable* segment has grown. This reflects improved knowledge levels (both tested and self-reported) and some attitudinal shifts (discussed shortly). Three in ten migrants remain at higher risk of exploitation – either because they are disheartened with low knowledge and high insecurity, or they are more knowledgeable but trapped in their situations.

2 Segment sizes and profiles of workers in the broader employment market (i.e. benchmark workers) are fairly similar to those of migrant workers. This reflects similar knowledge levels, job satisfaction, and some attitudes. Benchmark workers, however, feel somewhat better about speaking up in exploitative situations and are more confident that they know where to go for help.

3 Around a third or more of migrant and benchmark workers reported evidence of potential exploitation measured in the 2023 survey.

4 Several attitudinal and behavioural shifts are evident among migrant workers since 2021 – these likely reflect more knowledgeable migrant workers and a tighter labour market in 2023:

- A higher proportion of migrant workers work overtime (more than 40 hours a week) in 2023.

- They are less accepting of poor working conditions in 2023 and feel less reliant on their job for residency.
- Job satisfaction (at the ‘very satisfied’ end) has weakened and fewer now express a sense of gratitude.
- Migrant workers feel a little better in 2023 about speaking up in exploitative situations. However, fear of retaliation and negative consequences continue to hold many back.
- There is a small but growing negative sentiment about government support of migrant workers.

5 There is a job ahead to grow awareness of the Migrant Exploitation Protection Visa (MEPV). Awareness has dropped since 2021 to just 16%, and is lowest among the segments that would potentially benefit the greatest from this pathway for migrants to quickly leave exploitative situations.

6 The concept of a free government disputes resolution service was well received by three quarters of migrant workers.

Employers summary: Key findings for 2023

- 1 There has been no significant change since 2021 in the segment size or profiles of employers of migrants. On the whole, employers continue to have a strong moral obligation to their workers.
- 2 This year, we segmented employers in the broader employment market too (i.e. benchmark employers). Segment sizes are markedly different to those of employers of migrant workers. This is primarily because benchmark employers are much smaller businesses – they know less about employment regulations, believe government lack resource for dealing with bad employers, and are more likely to exhibit weaker legal compliance creating risk of worker exploitation. Three in ten benchmark employers are *Potential Exploiters*.
- 3 Some growing labour market and business pressures are evident. In 2023, we observe:
 - A growing sense among benchmark employers that it is hard to find good staff and turn a profit.
 - More employers of migrants now feel government rules are a barrier to business success.

- 4 Employers of migrants' understanding of their employment obligations (both self-rated and tested) has improved. This is coupled with a growing employer sense that worker awareness of employment law has also improved.
Note, improved employer knowledge isn't enough on its own to shift the employer segment sizes. This requires enhancing businesses' moral and legal attitudes towards compliance, e.g. employment laws that are perceived to support business success.
- 5 Employer awareness of the MEPV has also increased (now sitting at 24%).
- 6 Keeping up with employment and immigration laws is less difficult for employers of migrants than it was in 2021. More employers of migrants identify online searches and Immigration NZ emails as useful sources. And a growing number of employers of migrants have visited the various government websites tested.
- 7 Three quarters of employers of migrants are aware of the accredited employer work visa and have either applied, or plan to, apply for accreditation.

Method

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Research approach – surveys of workers

2023 SURVEY OF MIGRANT WORKERS

- Online survey of 1,024 temporary migrant workers¹ (i.e. migrants who are currently living in NZ, came to NZ in the last 5 years and have been in paid work during that time either as an employee or contractor).
- Fieldwork conducted 6 March – 2 April 2023.
- Average survey length of 23-minutes.
- Respondents sourced from a list provided by MBIE.
- Translated versions of the questionnaire meant respondents completed the survey in English (796), Samoan (3), Fijian (6), Tongan (6), Punjabi (1), Hindi (0), Tagalog (14), and simplified Chinese (198).
- Data are unweighted.

2023 BENCHMARK SURVEY OF WORKERS



Online survey of 955 workers in New Zealand in part-time or full-time paid employment (not self-employed).



Fieldwork conducted 15-22 February 2023.



Questions were placed on Kantar's regular online omnibus survey, which sources respondents from our online panel. Regional and age by gender quotas were set. A booster standalone survey of 300 Māori workers was also undertaken.

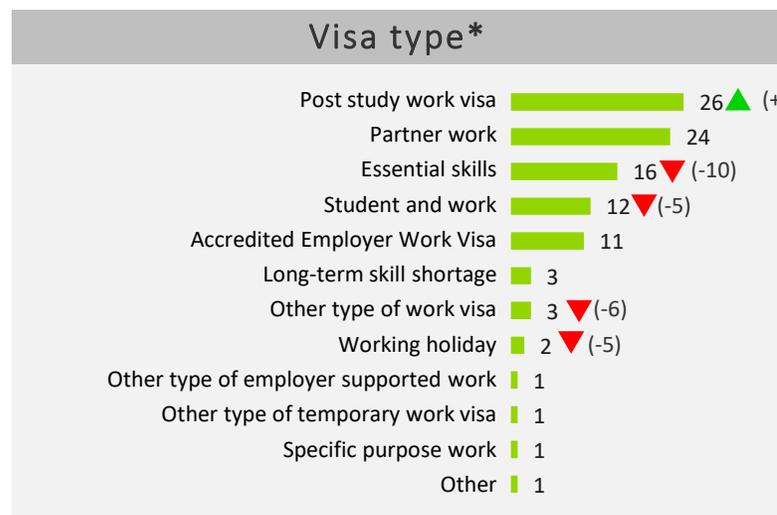
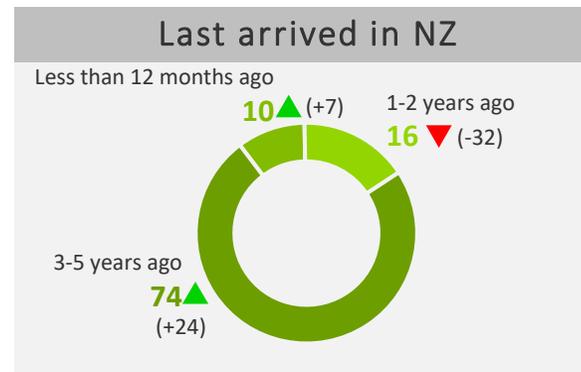
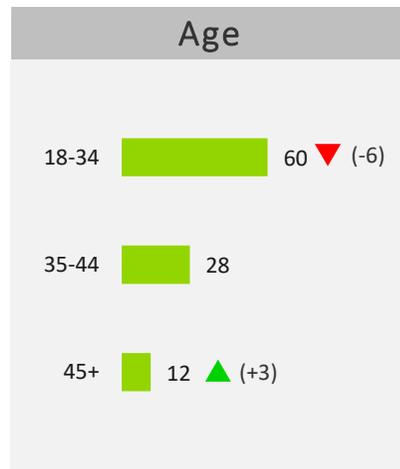
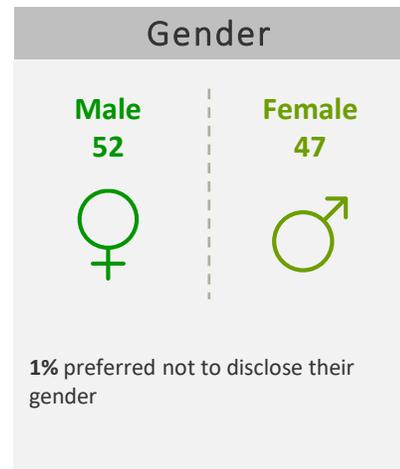


Data are weighted by age within gender and region, and ethnicity.

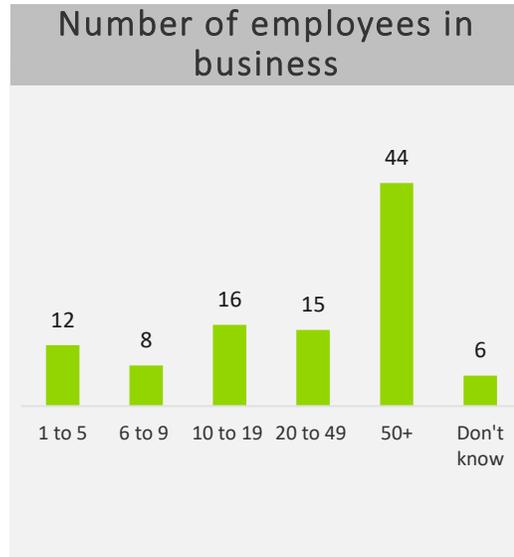
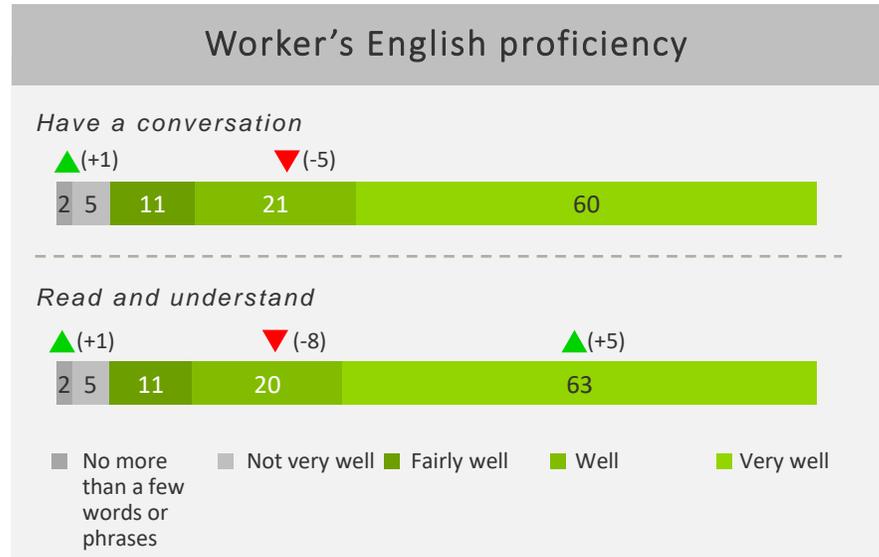
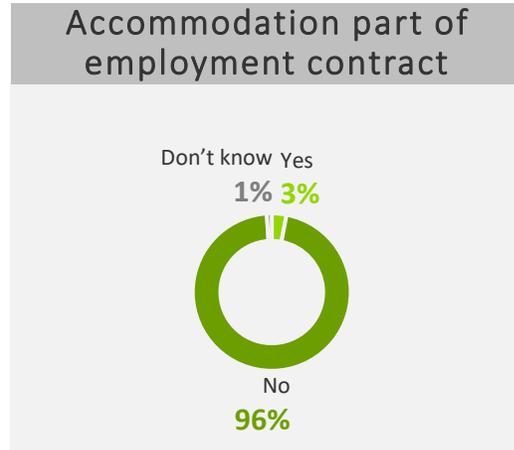
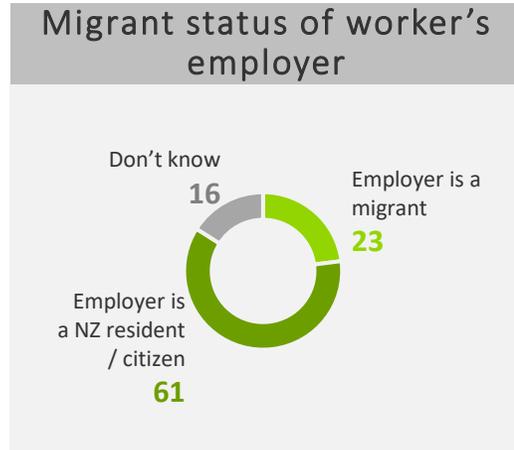
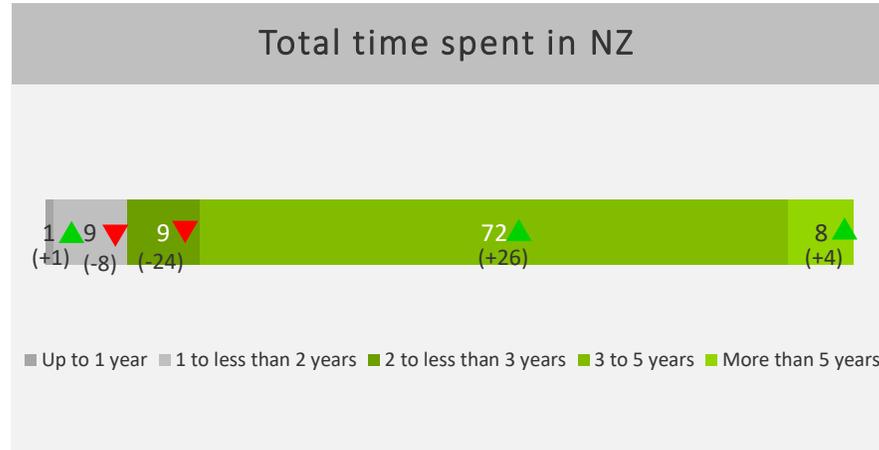
¹Respondents on the following visas qualified for the survey: working holiday visa, student and work visa, post-study work visa, essential skills visa, long-term skill shortage visa, Recognised Seasonal Employer Limited Visa (RSE), Accredited Employer Work Visa, another type of employer supported work visa, Migrant Exploitation Protection Work visa, partner work visa, other type of temporary work visa, specific purpose work visa, other type of work visa. Migrants who were currently working, but without a current visa also qualified for the survey.

Who we surveyed – migrant workers

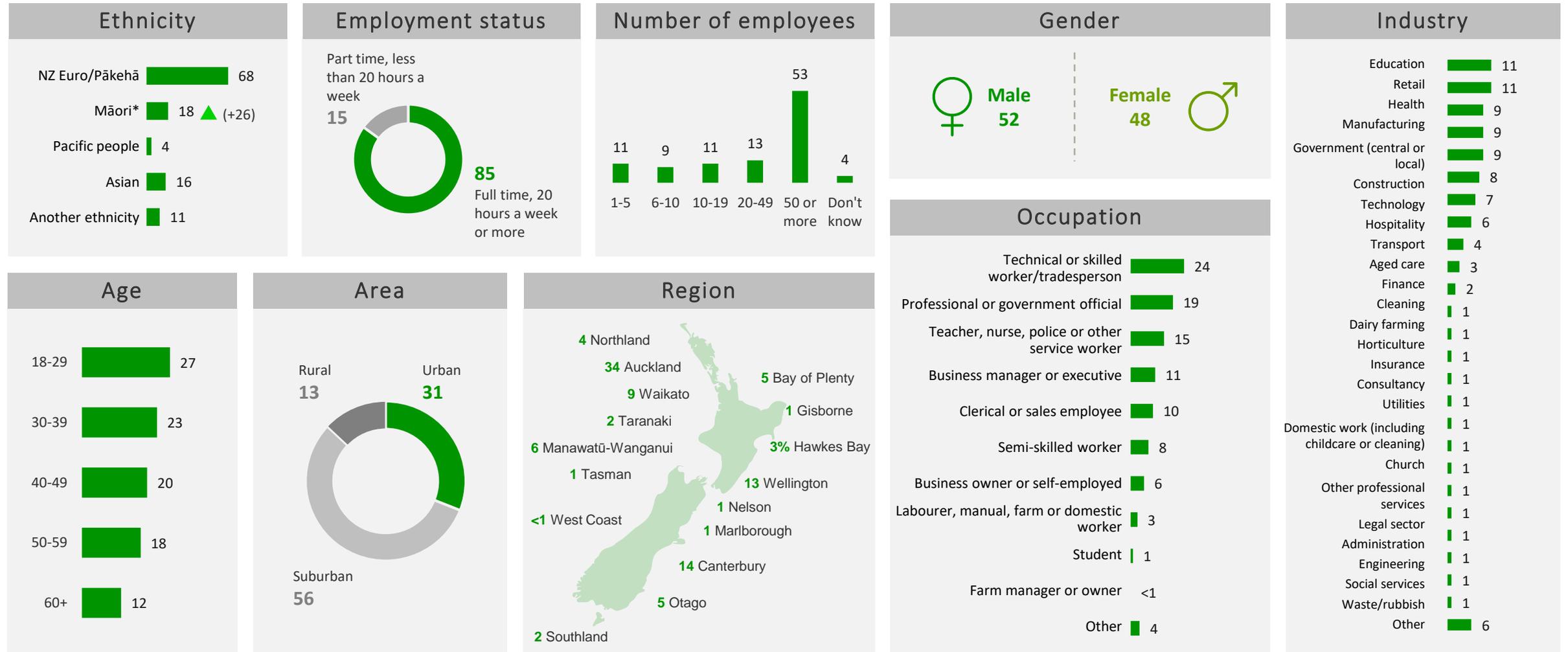
Language survey completed in	
Language	Number of interviews
English	796
Simplified Chinese	198
Tagalog	14
Tongan	6
Fijian	6
Samoan	3
Punjabi	1
Hindi	0



Who we surveyed – migrant workers



Who we surveyed – benchmark workers



Research approach – surveys of employers

Survey of employers of migrants

- Online survey of 528 employers of migrant workers (either currently employed or in the last 5 years).
- Fieldwork conducted 23 February – 28 March 2023.
- Average survey length of 20-minutes.
- Respondents sourced from a list provided by MBIE.
- Data are unweighted.

Benchmark survey of employers



Online survey of 400 employers. Respondents sourced from Kantar’s online panel of businesses.



Respondents were either a business owner, director, manager, or team leader. Only businesses that currently employ people qualified for the survey.



Fieldwork conducted 23 February – 7 March 2023.

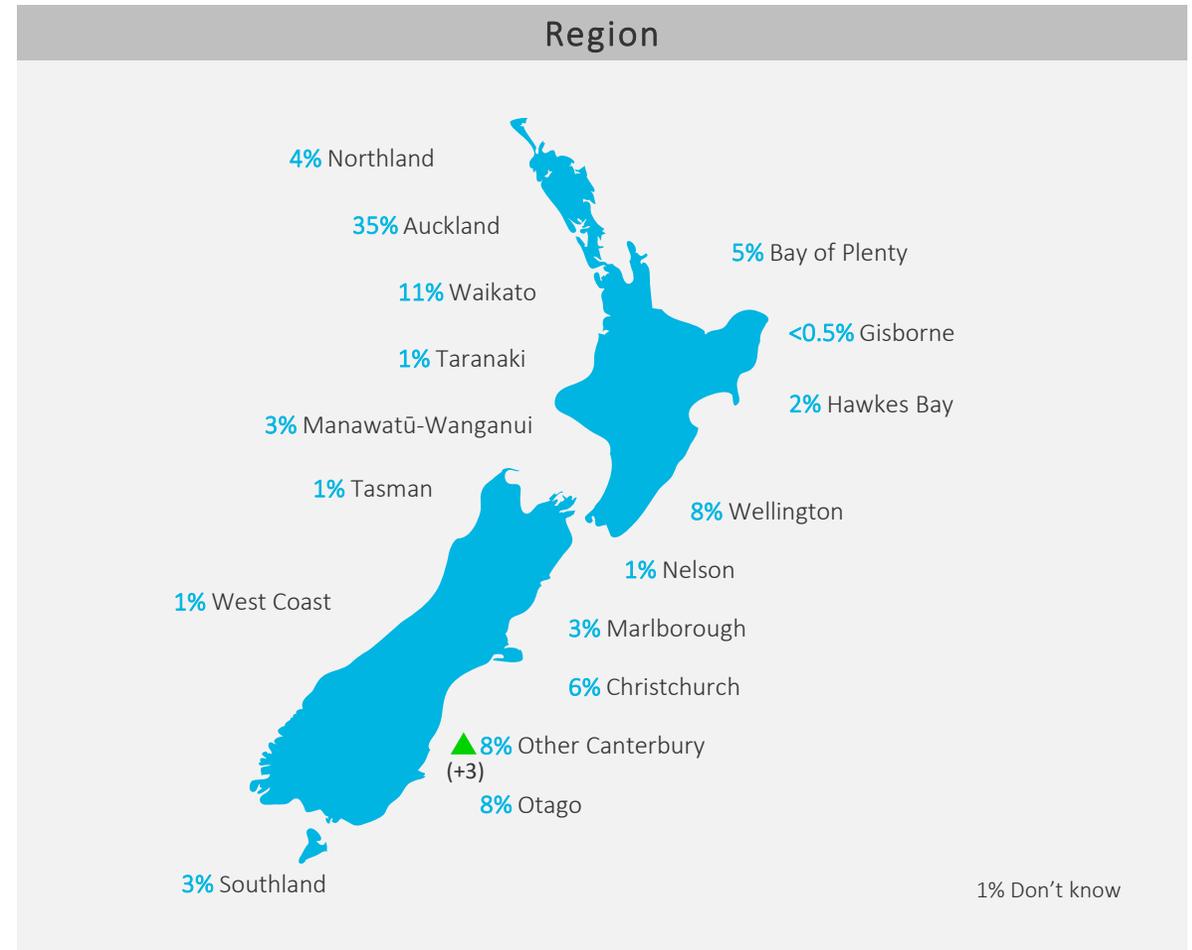
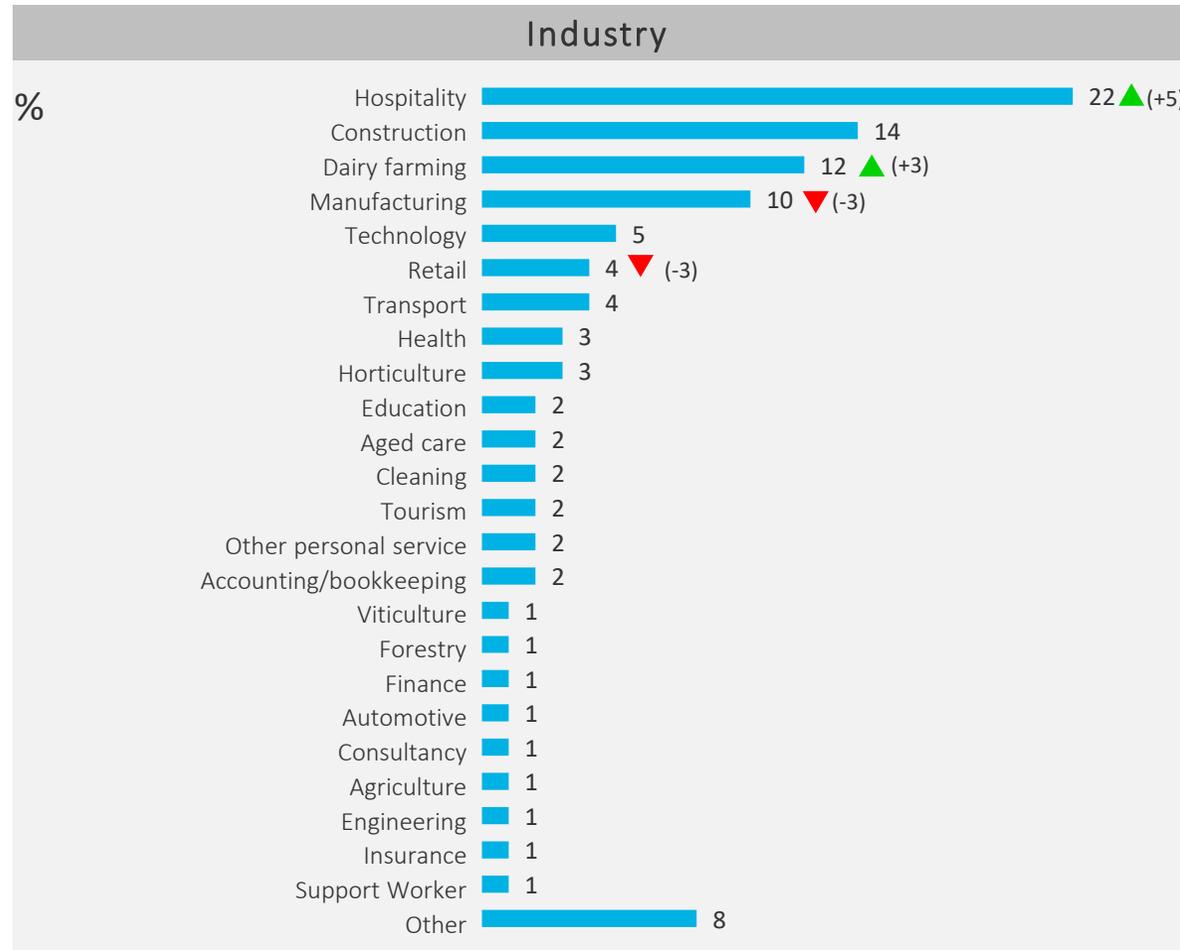


Average survey length of 14-minutes.



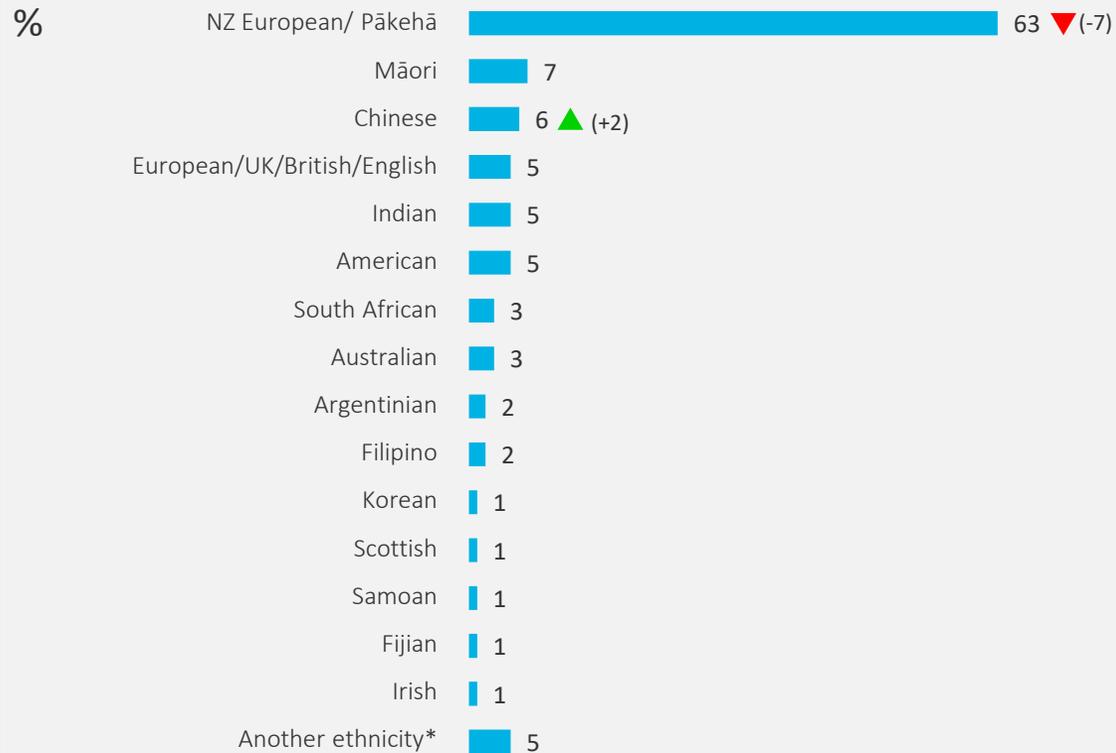
Data are weighted by industry and business size.

Who we surveyed – employers of migrants



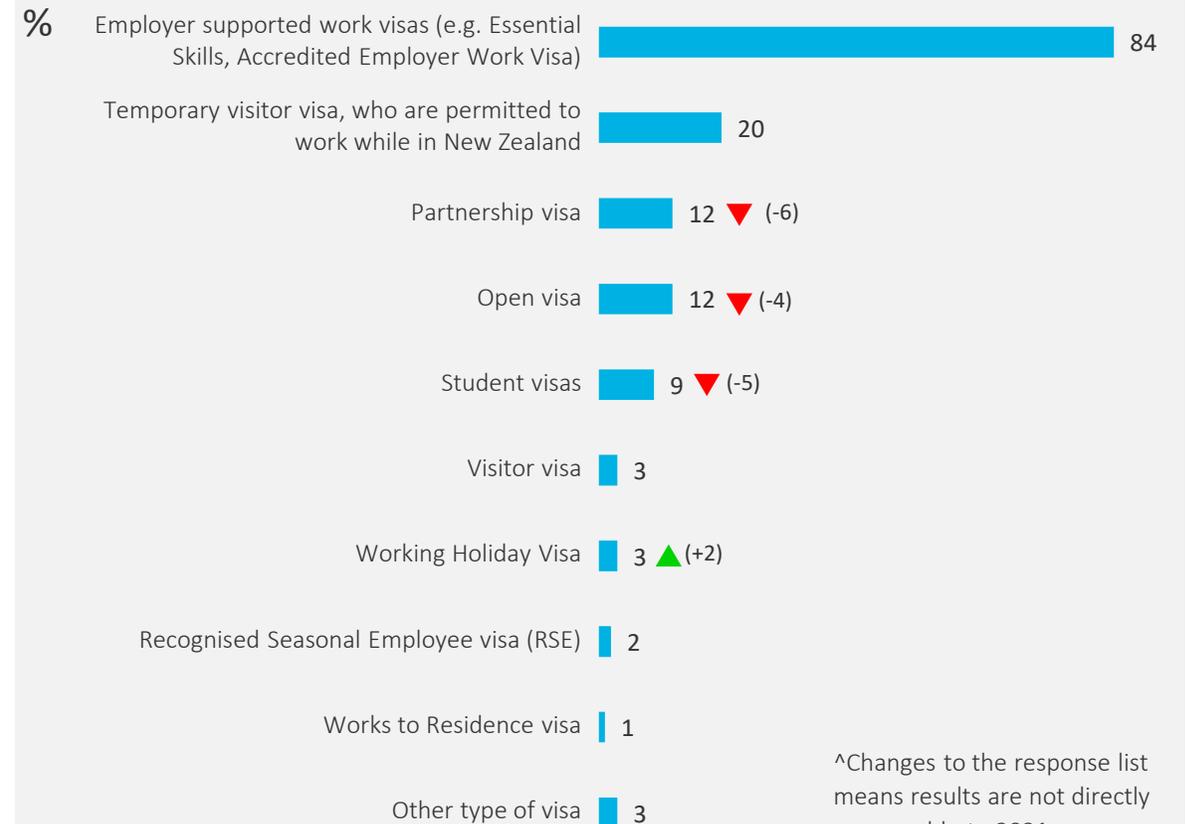
Who we surveyed – employers of migrants

Ethnicity of employer



*Includes less than 0.5% for each of the following ethnicities: Tongan, Malay, Cook Island Māori, Sri Lankan, Thai, Japanese, Taiwanese, Pakistani, Cambodian, Niuean.

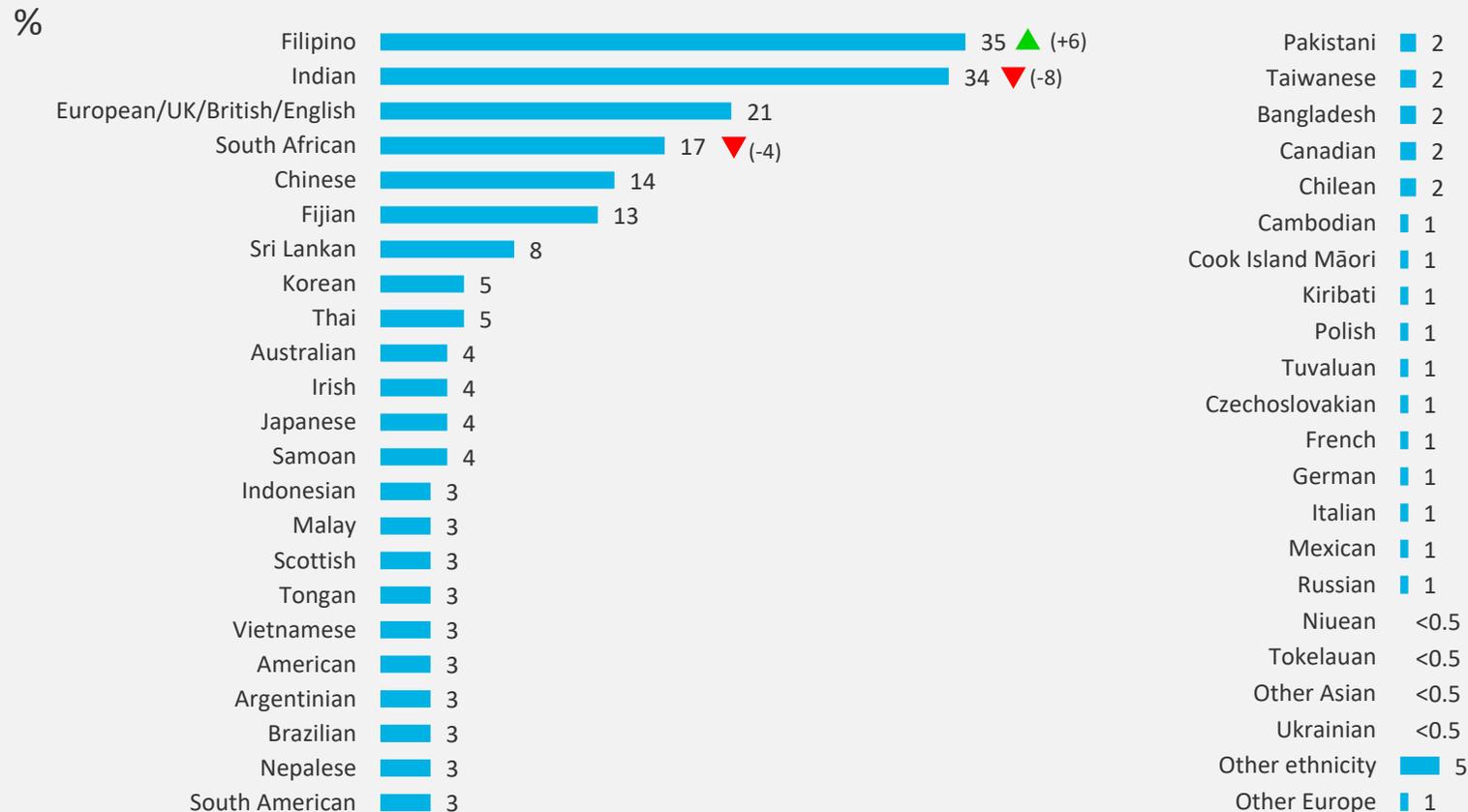
Visa types of migrant workers in the business[^]



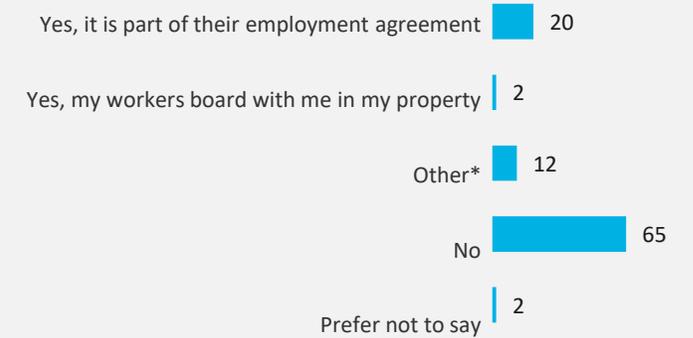
[^]Changes to the response list means results are not directly comparable to 2021.

Who we surveyed – employers of migrants

Ethnicities of migrant workers in the business



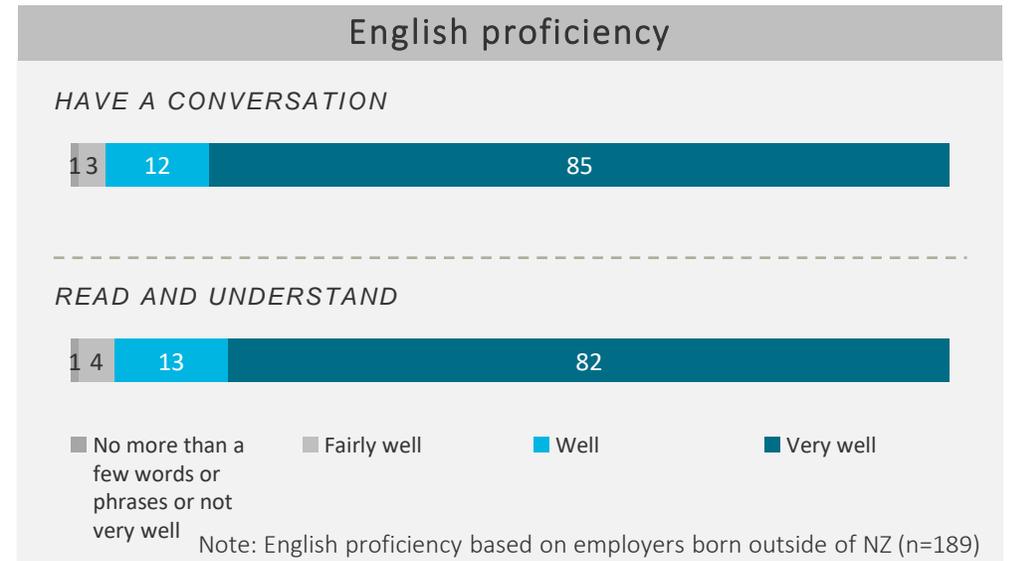
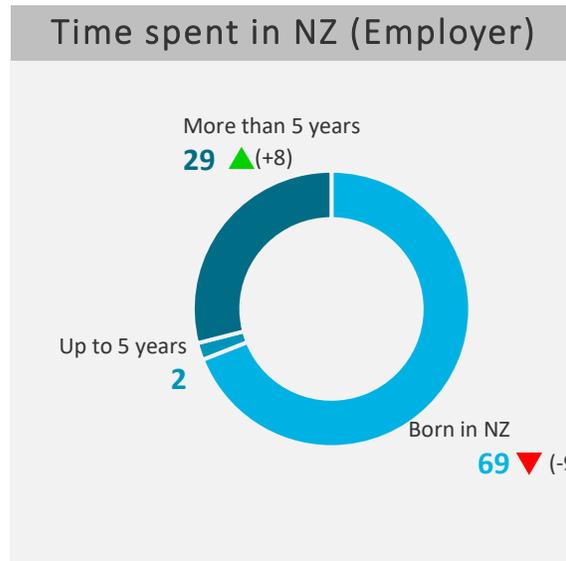
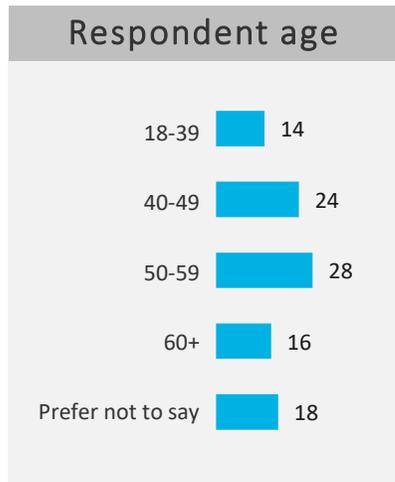
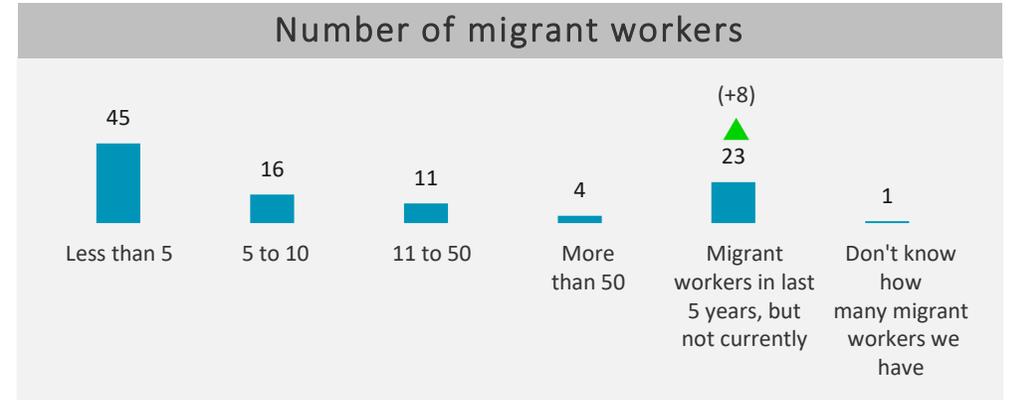
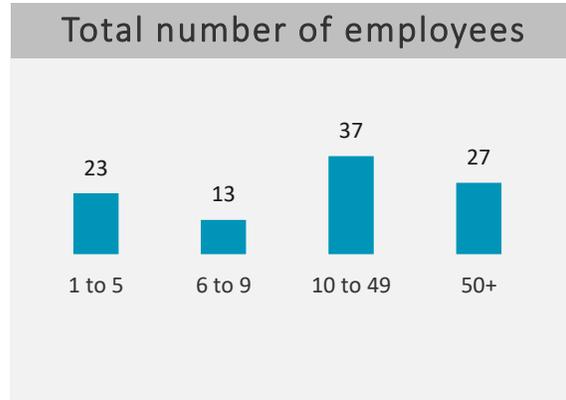
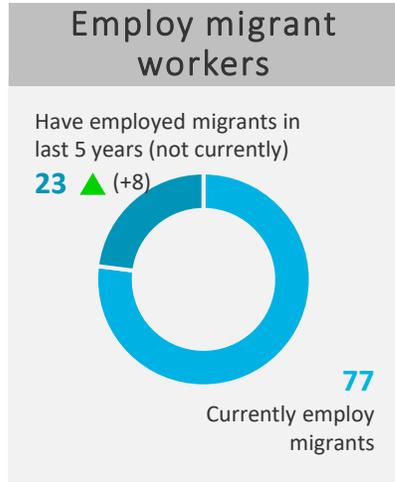
Provide accommodation to workers



* Other mentions include: provide accommodation but not necessarily part of employment contract (16 mentions), have accommodation that they rent to workers if needed (13 mentions), provide temp accommodation when workers first arrive in NZ (12 mentions), help workers find accommodation (12 mentions).

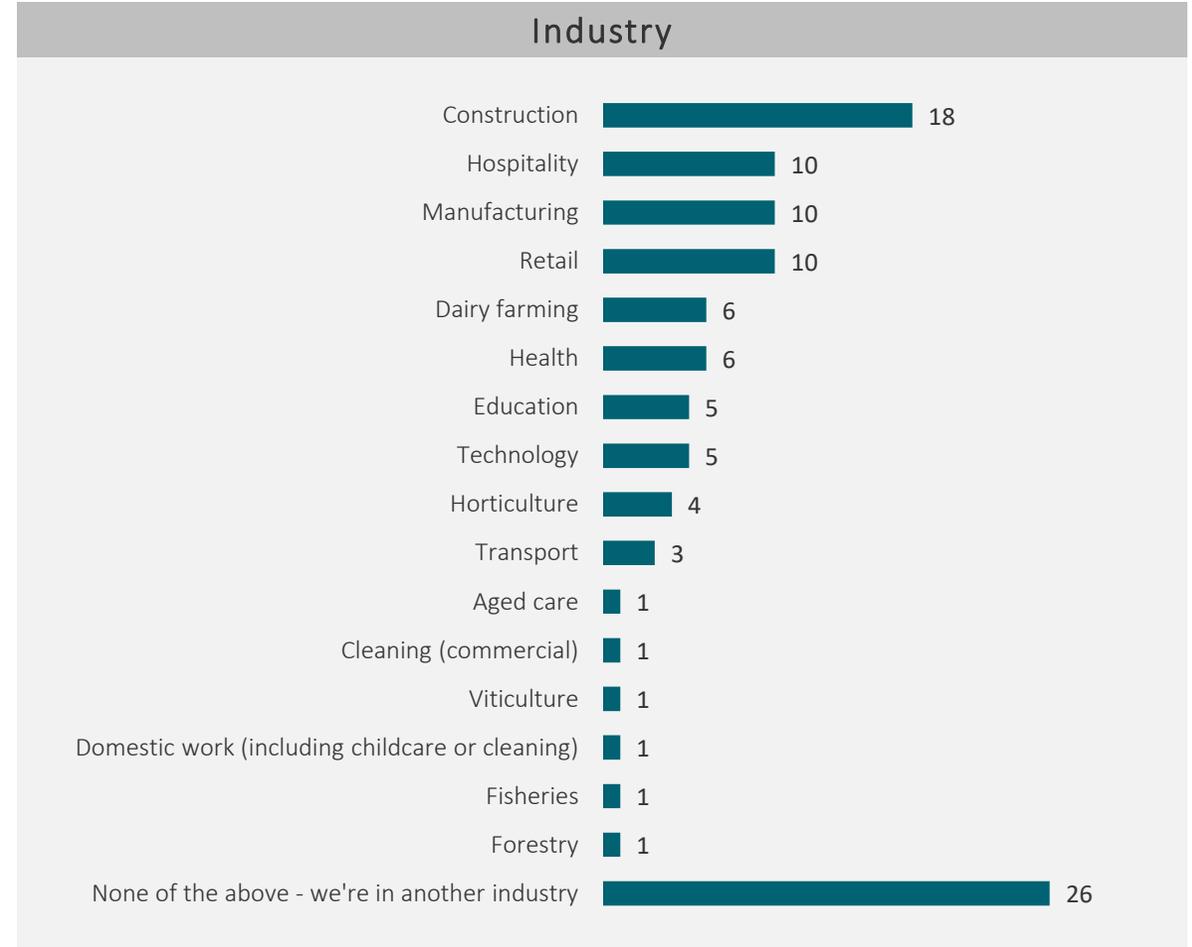
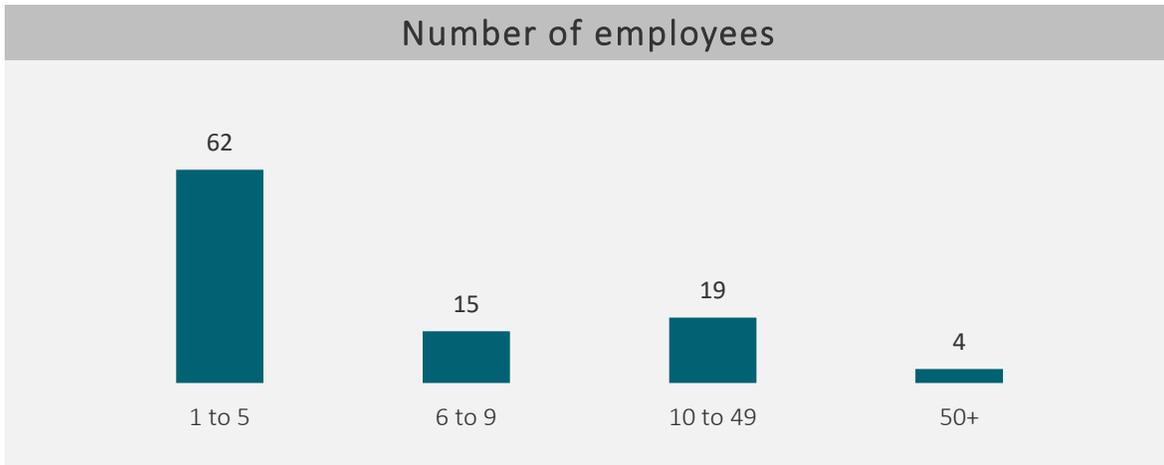
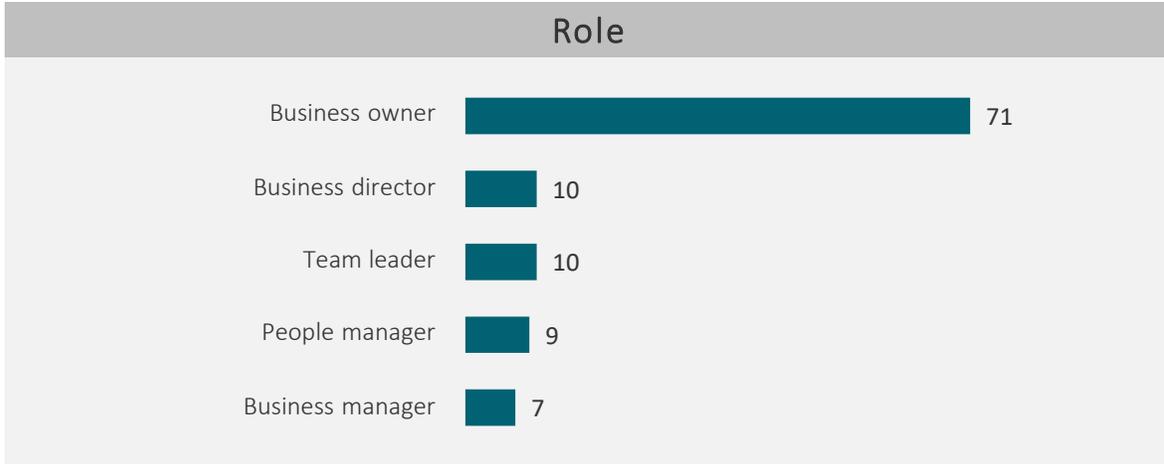
Who we surveyed – employers of migrants

%



Who we surveyed – benchmark employers

%



Worker results



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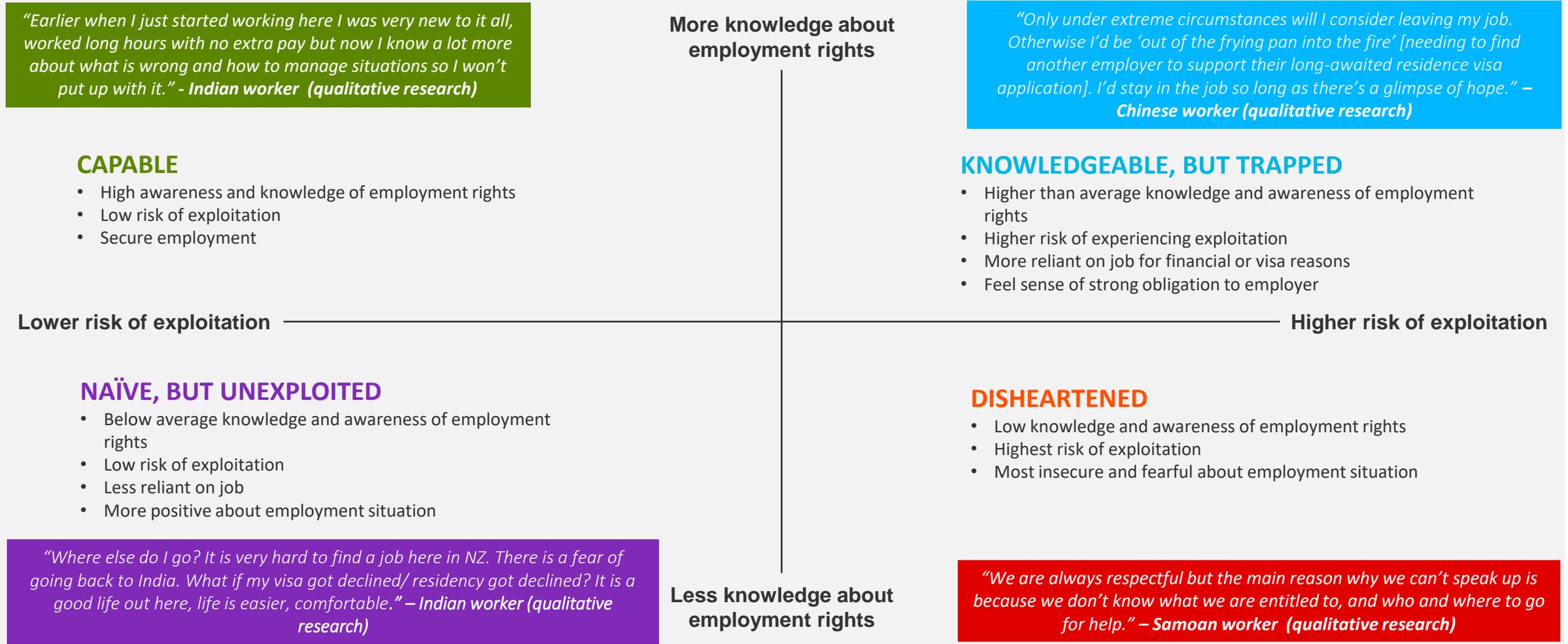
What do we observe with the worker segments in 2023?

Similar to 2021, three in ten migrant workers in 2023 could be at higher risk of exploitation – two in ten are *knowledgeable, but trapped* while one in ten are *disheartened*.

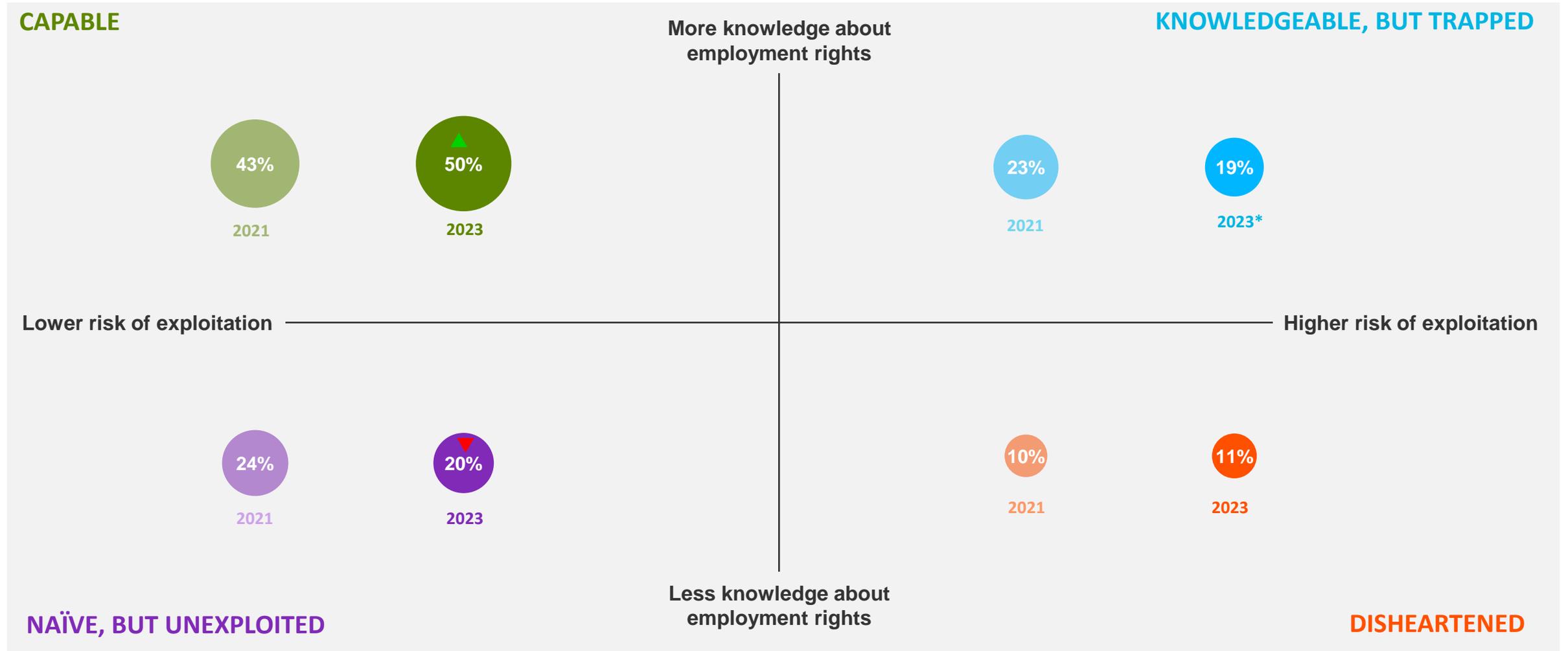
Since 2021, the size of the *Capable* segment has grown, while the *Naïve, but unexploited* segment has decreased. This is largely driven by improved knowledge, and to a lesser extent somewhat greater confidence and determination to speak up when rights are breached.

While benchmark and migrant workers have similar levels of knowledge about their employment rights, migrant workers are less likely to strongly feel they know where to go for help if they need support.

In 2021, we identified four groups of migrant workers who differ on their knowledge of employment rights and risk of exploitation.



This year, more migrant workers are in the *Capable* segment. This is driven primarily by a reduced *Naïve, but unexploited* group and a possible reduction in the size of the *Knowledgeable, but trapped* segment. The profiles of each group are similar to what they were in 2021.



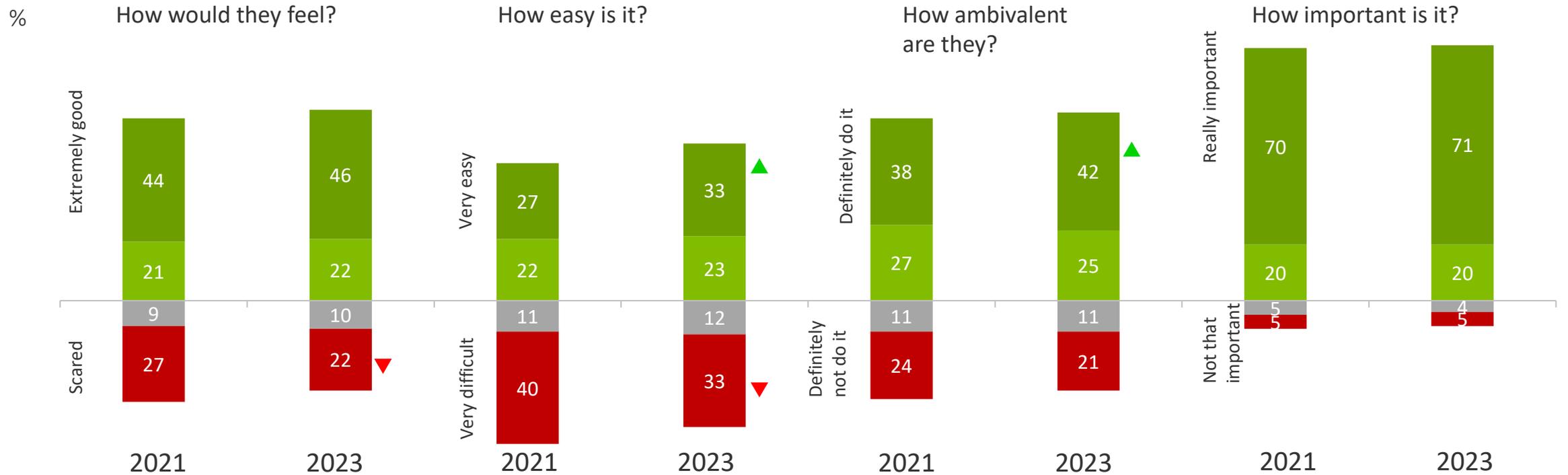
Migrant workers rate their knowledge of employment rights more highly in 2023 ('very well' is up 4 points), bringing them more on par with benchmark workers' knowledge.



▲ ▼ Significantly higher/lower than 2021

Compared to 2021, fewer migrants are scared to speak up, more find it easy and fewer are ambivalent about speaking up.

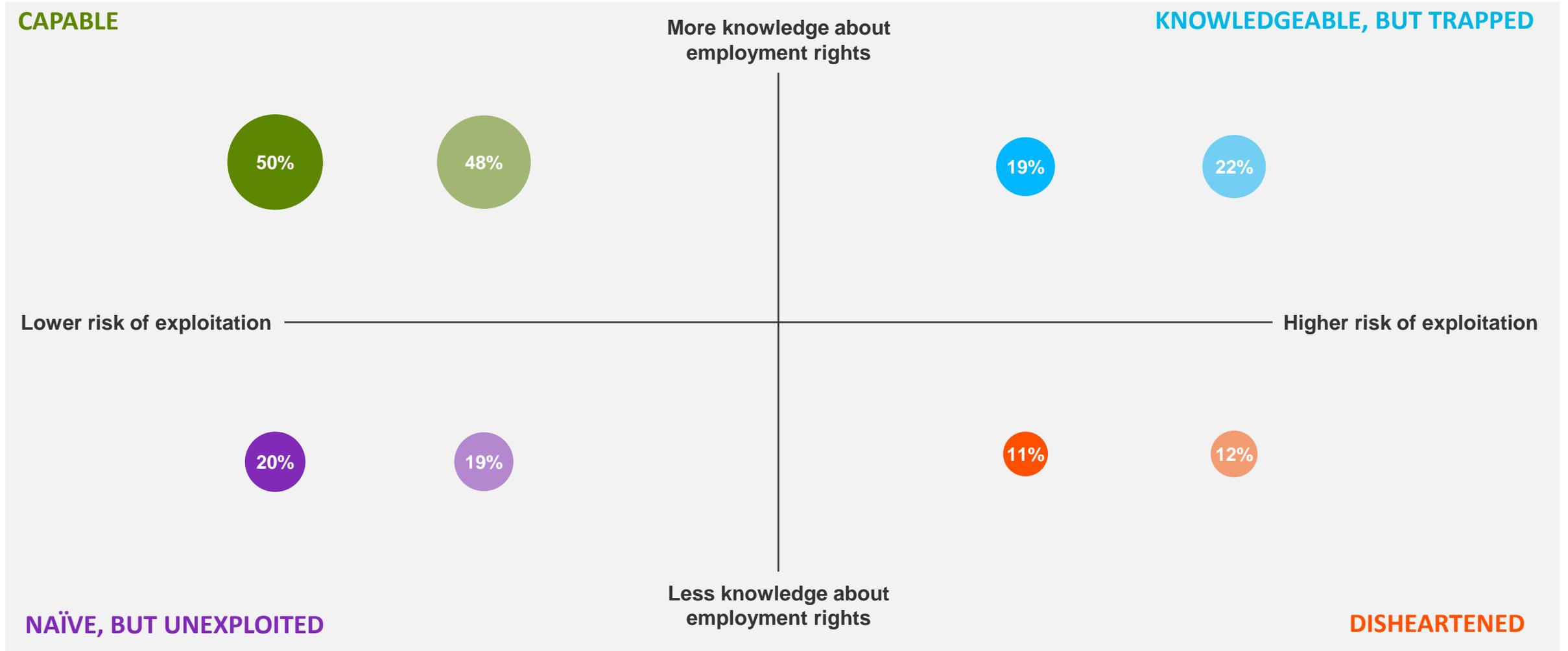
Commitment to speaking up in a situation where an employer is not giving you all your employment rights under the New Zealand employment law



Note: Results for benchmark workers are shown on page 62.

▲ ▼ Significantly higher/lower than 2021

Segment sizes and profiles of benchmark workers and migrant workers are fairly similar.

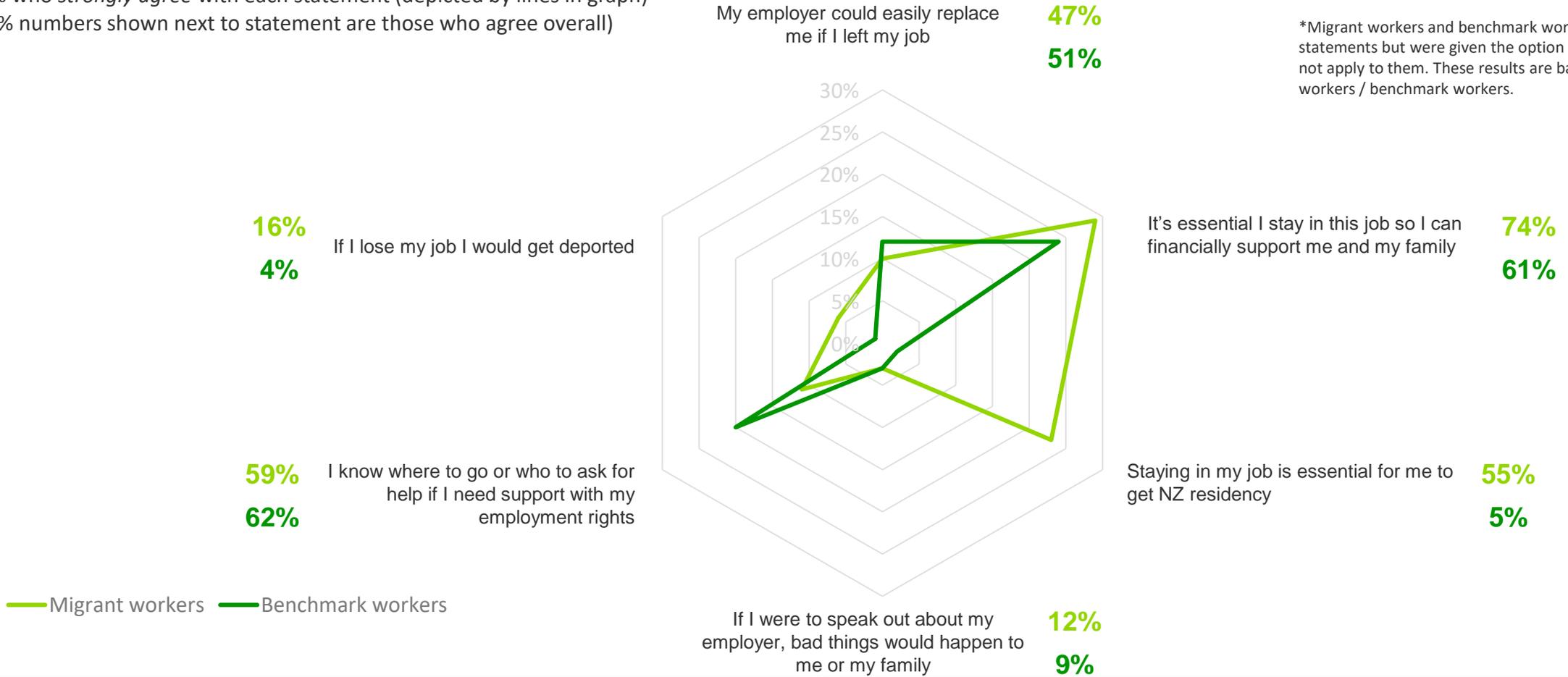


Benchmark and migrant workers share some similar attitudes which can be markers of potential exploitation. However, the strength of these attitudes can differ. Benchmark workers are more likely to *strongly* agree they know where to go for help with their employment rights.

Comparison of migrant worker and benchmark worker* attitudes

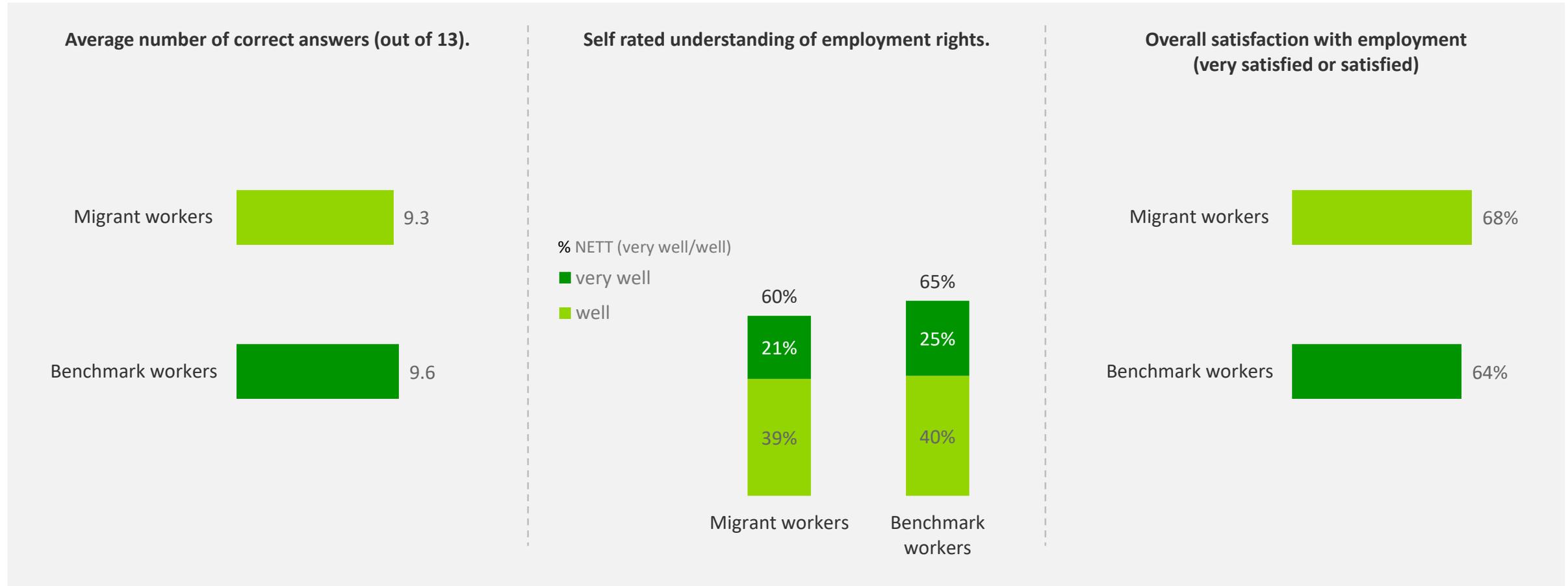
% who *strongly agree* with each statement (depicted by lines in graph)
 (% numbers shown next to statement are those who agree overall)

*Migrant workers and benchmark workers were asked the same statements but were given the option to say if a statement did not apply to them. These results are based on all migrant workers / benchmark workers.



And they are similar on tested knowledge levels, self-rated understanding of employment rights, and job satisfaction.

Comparison of migrant worker and benchmark worker knowledge and job satisfaction



Setting the context – how have temporary migrant workers’ employment situations changed since 2021?

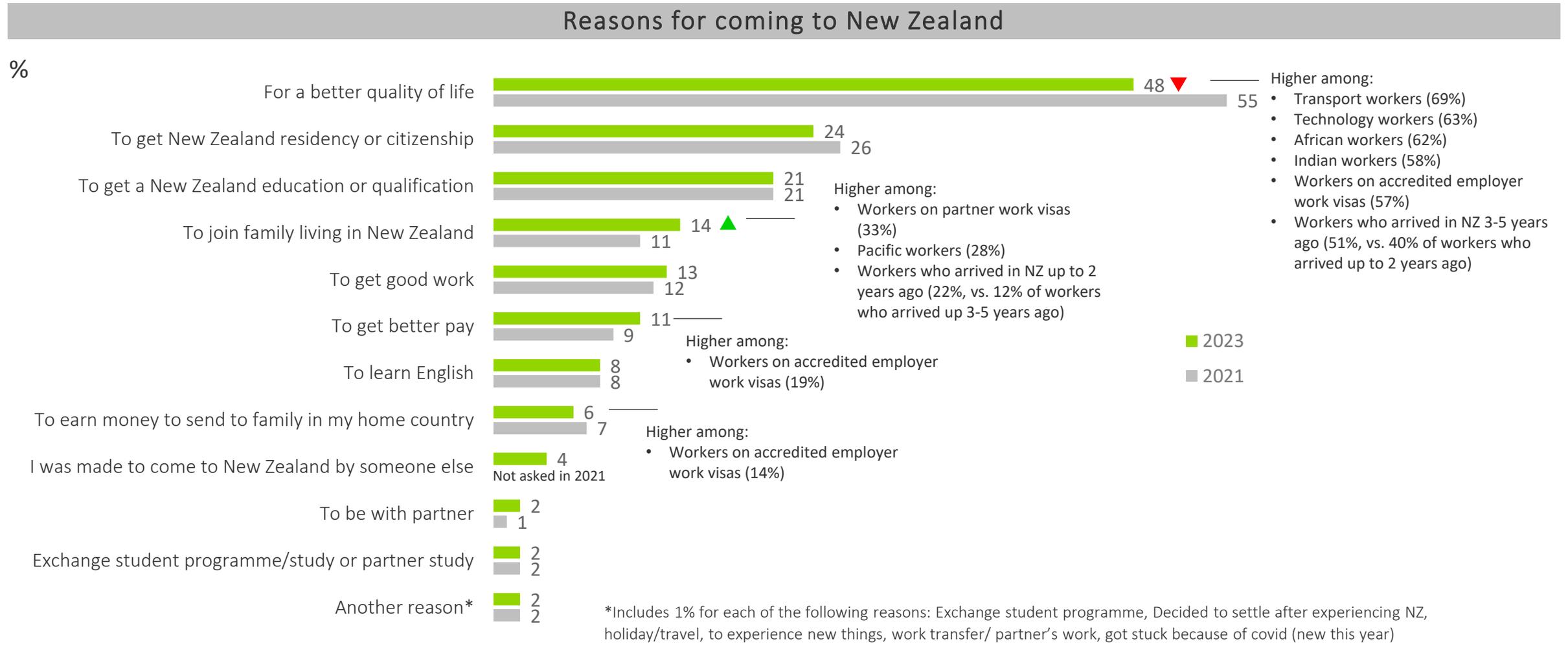
The search for a better quality of life remains a key motivator for many migrants to come to New Zealand, and for some the goal is to get residency or a NZ education.

More workers in 2023 said they came to NZ to join family than in 2021, and a greater number are finding work via friends and family. In particular, workers in construction, manufacturing, and small businesses make greater use of these informal channels.

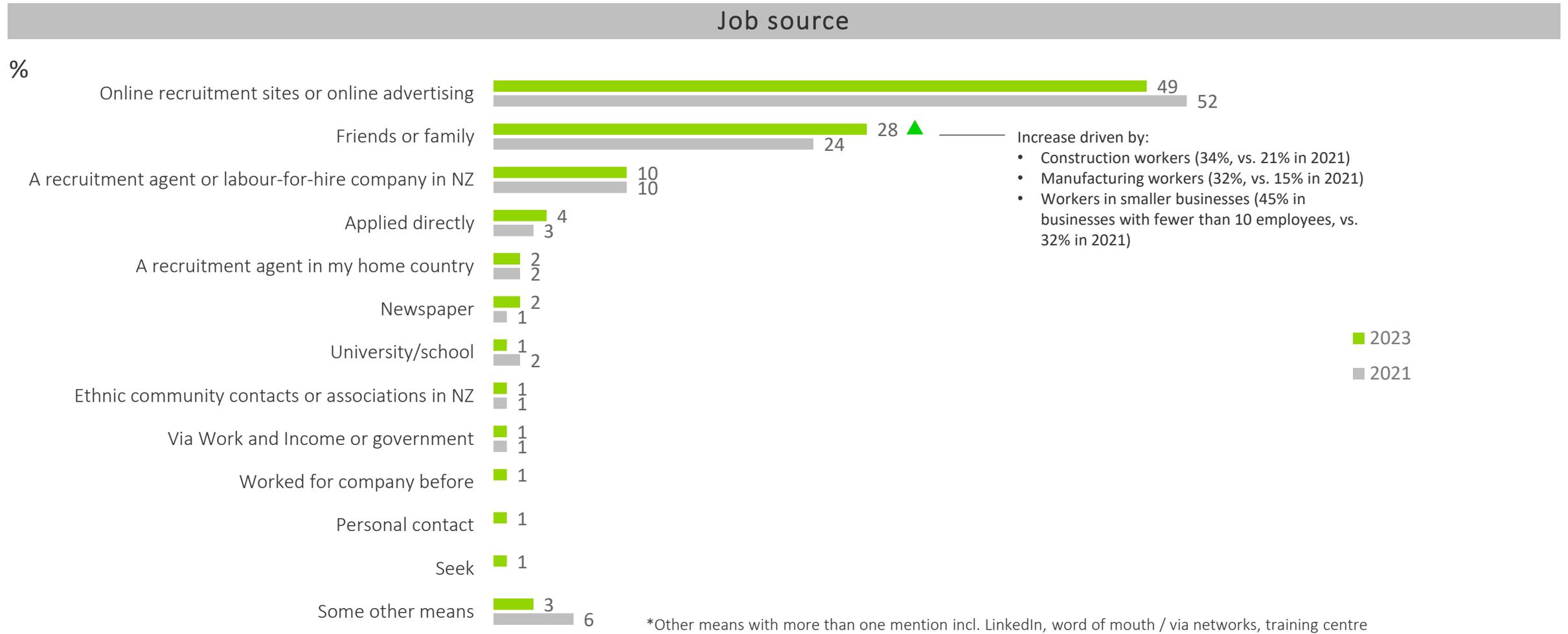
The majority of migrants remain satisfied with their employment situation, albeit ‘very satisfied’ ratings have waned a little (particularly among younger workers and those in the Capable segment).

There is greater polarisation in emotions in 2023, with both a greater sense of calm and anxiety among migrant workers. Fewer migrant workers express a sense of gratitude.

Despite fewer citing a better quality of life as a motivator to come to New Zealand, it remains the most common reason in 2023. Compared to 2021, more came to New Zealand to join family.



Online recruitment sites are still the most common way migrants find work. This year, more found work through friends or family, particularly workers in construction, manufacturing, and small businesses.



Overall, migrant workers are slightly more satisfied with their employment situation than benchmark workers, although a similar proportion of each group are *very satisfied*. Migrant workers' 'very satisfied' ratings have dropped since 2021. As it was in 2021, job dissatisfaction is high among Chinese workers.

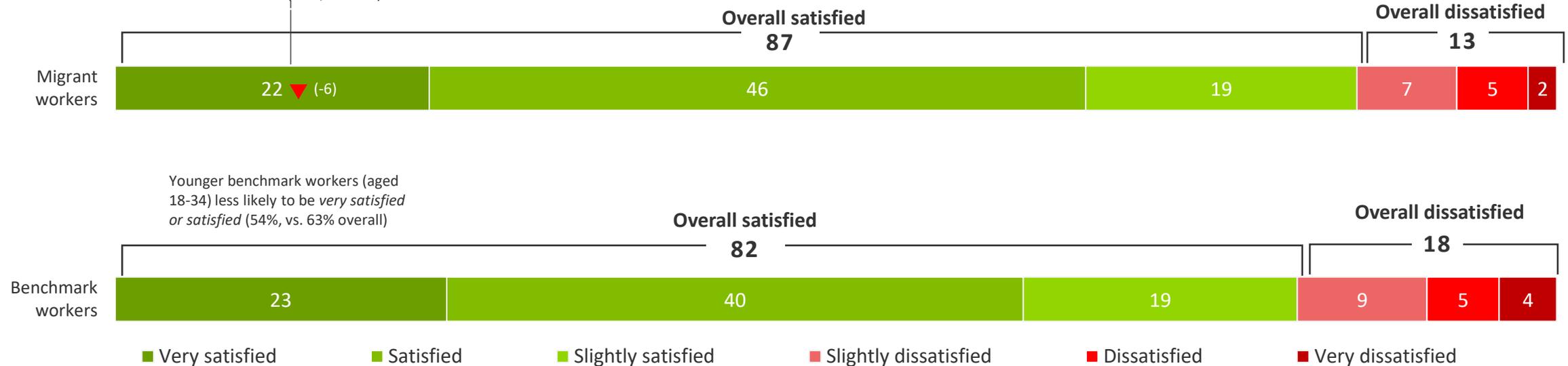
Satisfaction with employment

%

Compared to 2021, the following groups were less likely to say *very satisfied* :

- Workers on essential skills visas workers (23%, vs. 33%)
- Workers who arrived less than 3 years ago (21%, vs. 28%)
- Workers in the *Capable* segment (29%, vs. 42%)
- Aged 18-34 (20%, vs. 26%)
- Auckland based workers (22%, vs. 29%)

Similar to 2021, overall dissatisfaction is still higher among Chinese workers (19%)



Most migrant workers continue to be positive about their employment. Since 2021, we see a greater sense of calm coupled with greater anxiety suggesting a slight growing polarisation of migrant experiences. A sense of gratitude has also declined. Hospitality workers and those without family support in NZ continue to experience more negative emotions, on average. Interestingly, more construction workers feel calmer albeit less grateful about their work than in 2021.

Emotions (migrant workers)

%

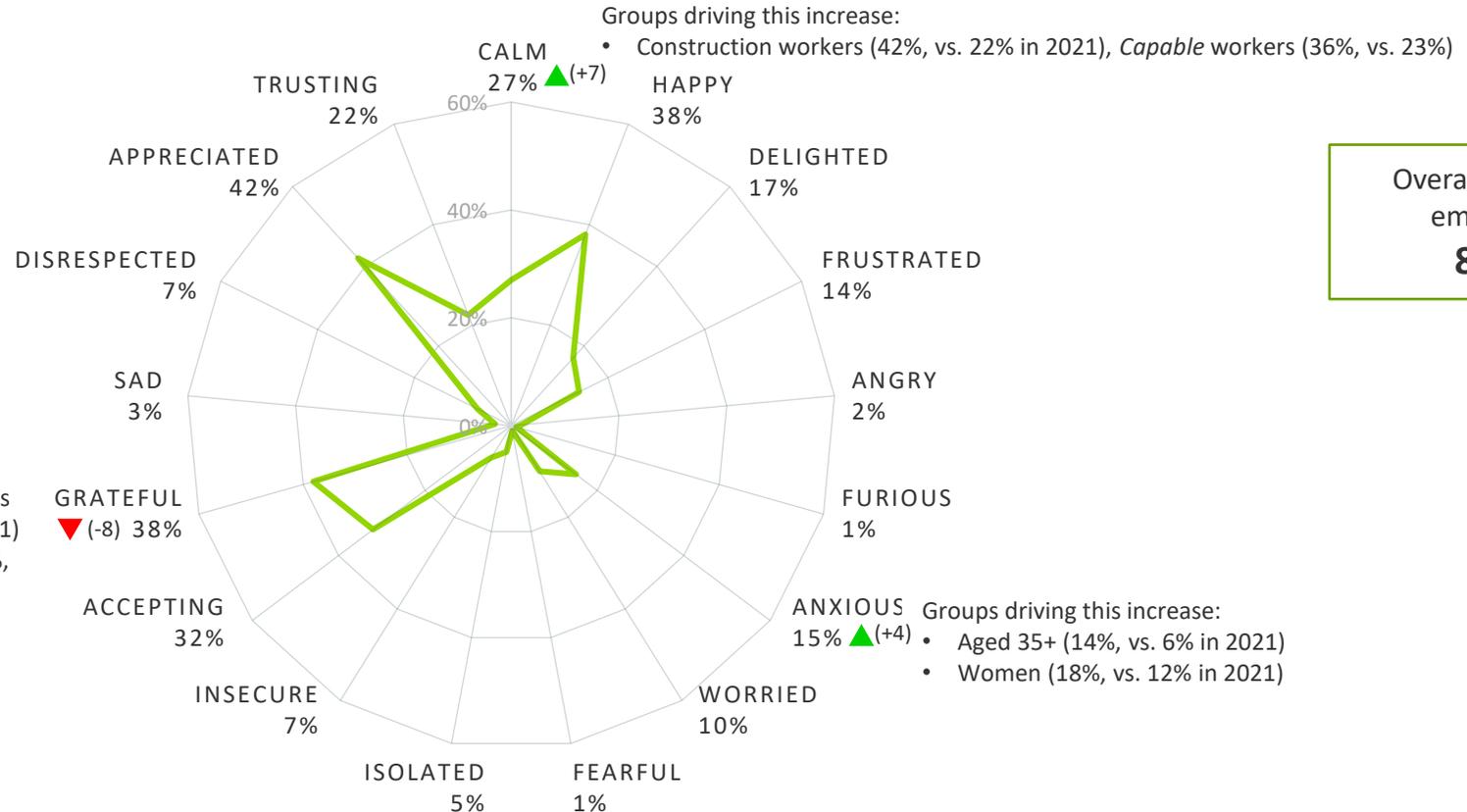
Overall negative emotions
36%

Overall negative emotions higher among:

- Hospitality workers (48%)
- Workers who do not have close family or relatives living in NZ (40% vs 32% of those with family support)

Groups driving this decrease:

- Construction workers (33%, vs. 55% in 2021)
- Health workers (44%, vs. 51% in 2021)



Overall positive emotions
88%

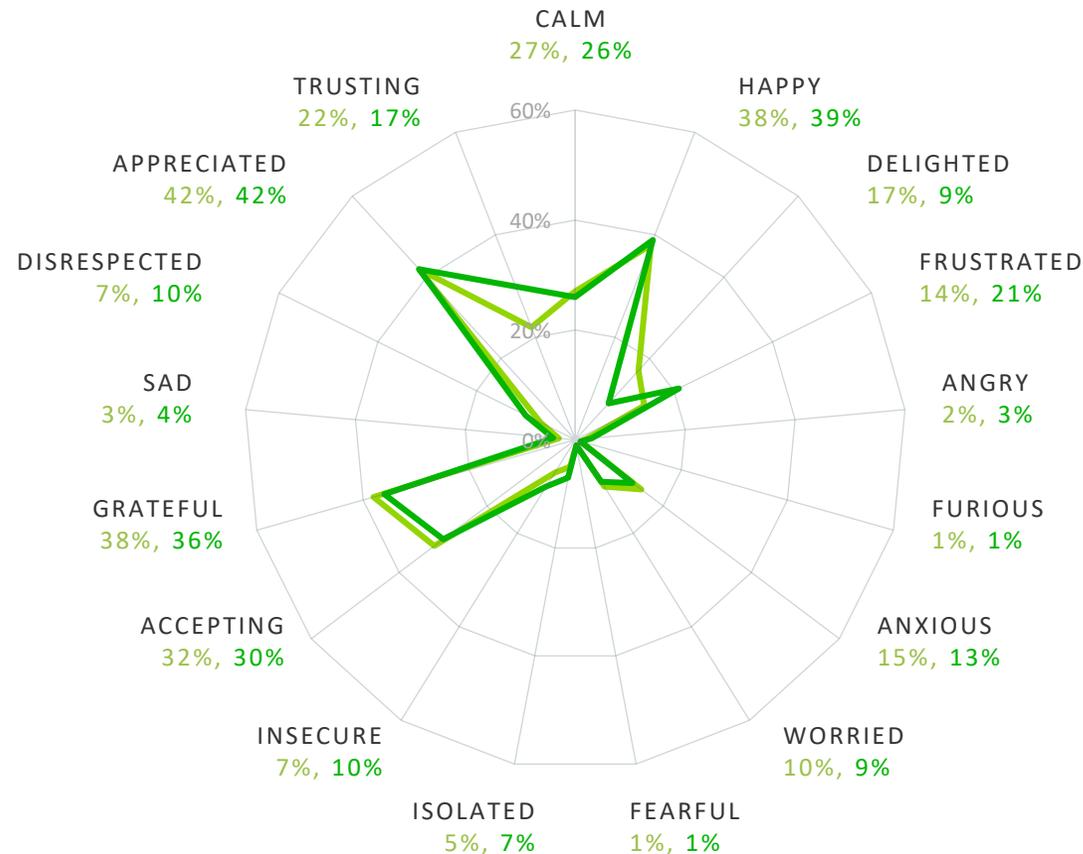
Benchmark and migrant workers are now equally grateful for their employment. Overall, migrant workers are more positive than benchmark workers about their employment.

Comparison of migrant worker and benchmark worker emotions

%

Overall negative emotions
Migrant workers: 36%
Benchmark workers: 40%

Overall positive emotions
Migrant workers: 88%
Benchmark workers: 82%



Benchmark workers in large businesses (50+ employees) are less likely to feel happy (35%, vs. 43% of those in businesses with fewer than 50 employees). They are also more accepting albeit less trusting than workers in smaller businesses

xx% Migrant workers
 xx% Benchmark workers

How much do workers know about their employment rights in New Zealand?

Both migrant and benchmark workers' tested knowledge of employment rights has improved since 2021. Further, as noted earlier (page 23), migrant workers' self-reported knowledge has improved.

However, correct knowledge of the current minimum wage is markedly lower than in 2021. This may be due to timing of the last increase in the minimum wage (around the time of the 2023 survey fieldwork) and that the new amount is no longer a rounded number.

We showed workers a range of employment rights, and they indicated which they thought were correct and which were incorrect. Workers were also asked to state the minimum wage.

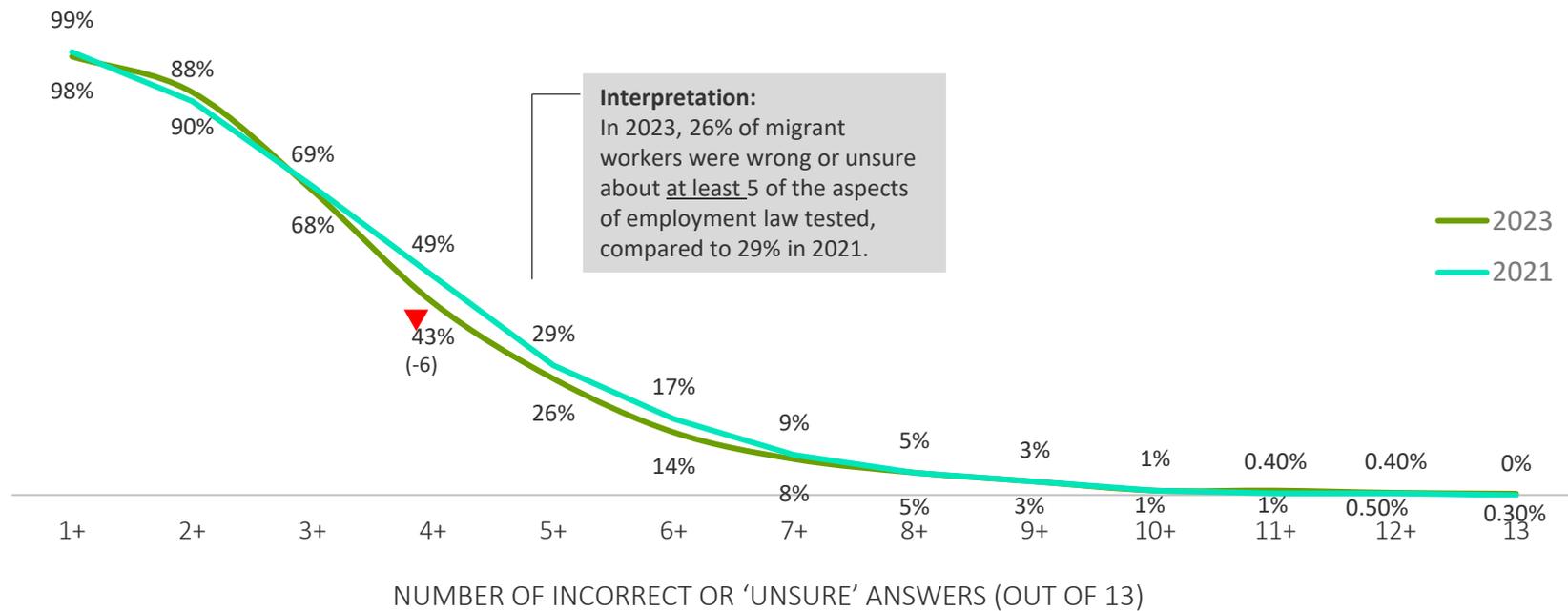
Employment right / regulation	Right Answer
Annual Leave: Employees have the right to at least 20 days annual leave after one year into the job	Correct
Public holidays: If an employee works on a public holiday and it would normally have been one of their working days, they are entitled to get paid 1.5 times their normal pay and have another day off	Correct
Employment contract: Employers must provide the employee with a copy of the employment contract (agreement) before they start their job	Correct
Consequences: Employers caught exploiting or mistreating migrant workers can be banned from hiring migrants in the future	Correct
Trial: A 90 day trial period is only valid if the employer has less than 20 employees and it is written in the employee's employment contract (agreement) before they start working.	Correct
Training: Employers need to pay employees when they are being trained for the job	Correct
Contractors: Contractors don't have the same rights as employees	Correct
Breaks: All breaks are unpaid (i.e. morning tea, lunch, afternoon tea)	Incorrect
Ask for money: An employer can ask for money from a potential worker to give the worker a job	Incorrect
Safety gear: Employees must pay for their own health and safety equipment	Incorrect
Wages: The adult minimum wage in NZ for migrants is \$18.70 now.	Incorrect
Job: An employer can employ a migrant as a chef but have them work as a waiter.	Incorrect
Deductions: An employer can make deductions from an employee's wages or salary for any reason they want to without their consent.	Incorrect

Migrant worker knowledge has improved. Just over four in ten migrant workers have incorrect knowledge about 4 or more employment rights; this is a significant decline since 2021 (from 49%).

Incorrect knowledge or unsurety about employment rights (cumulative data)

AVERAGE NUMBER OF INCORRECT OR UNSURE ANSWERS (OUT OF 13) =

4/13

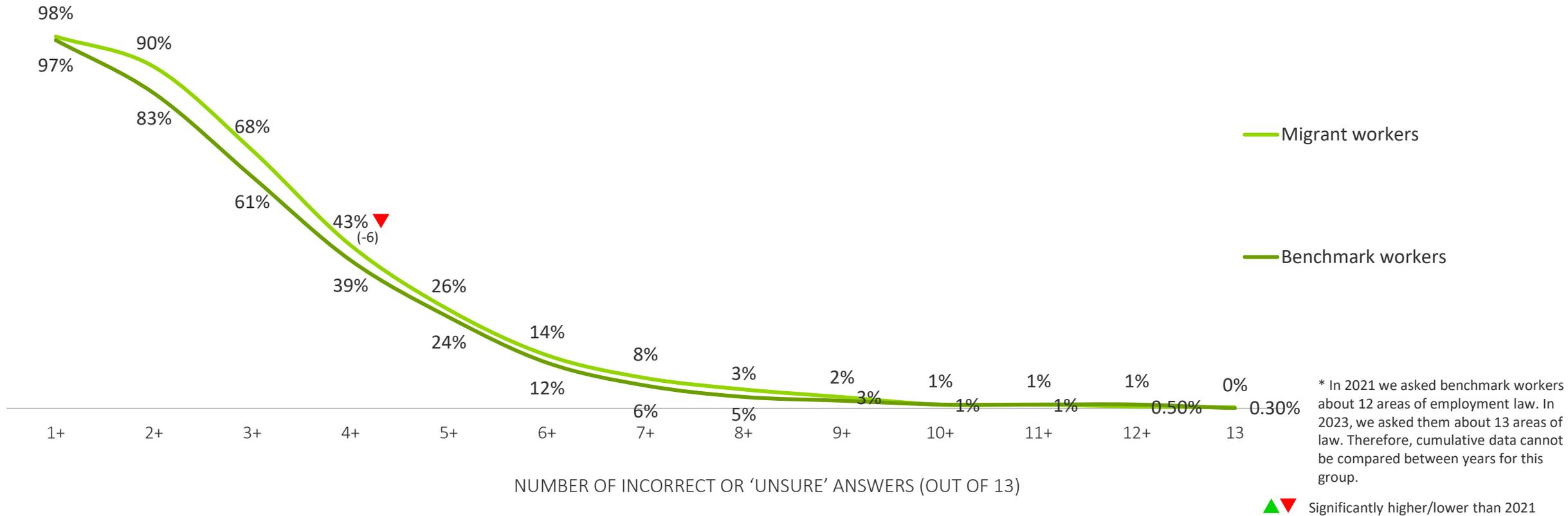


Interpretation:
 In 2023, 26% of migrant workers were wrong or unsure about at least 5 of the aspects of employment law tested, compared to 29% in 2021.

▲ ▼ Significantly higher/lower than 2021

Migrant workers and benchmark workers continue to exhibit very similar levels of incorrect knowledge/unsurety.

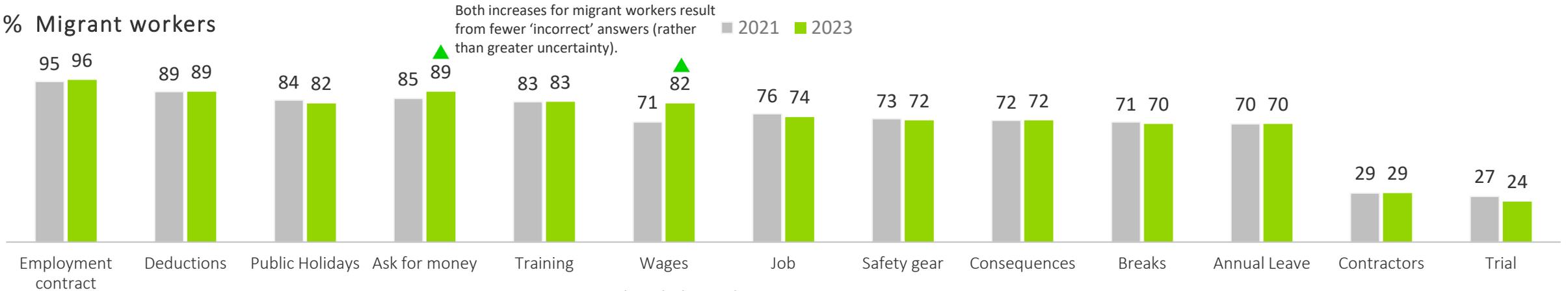
Incorrect knowledge or unsurety about employment rights – comparison to benchmark



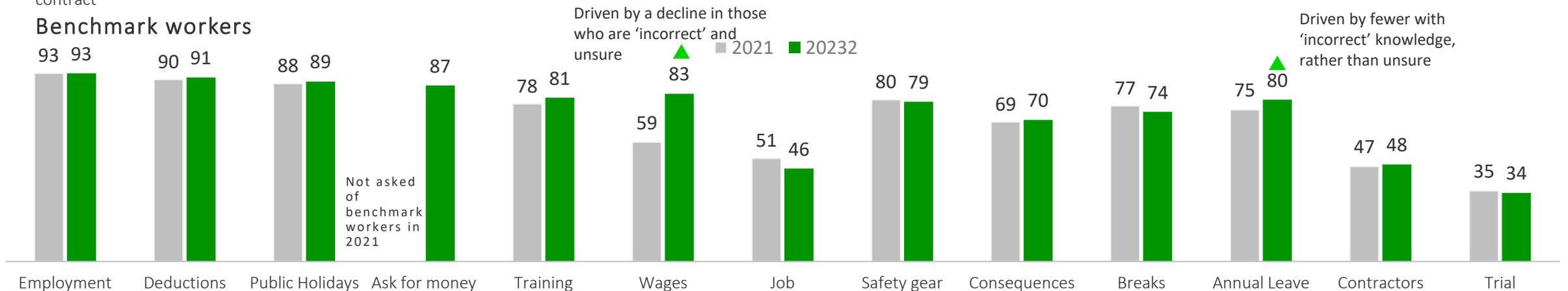
Compared to 2021, more migrant workers in 2023 know an employer cannot ask a worker for money in return for a job. This year, both groups of workers are more likely to reject the incorrect assertion of an \$18.70 minimum wage, and more benchmark workers know about annual leave rights. The majority of migrant and benchmark workers remain unclear about contractor and trial period rules (although benchmark workers have slightly better knowledge in these areas).

Knowledge of minimum employment rights

% Migrant workers



Benchmark workers

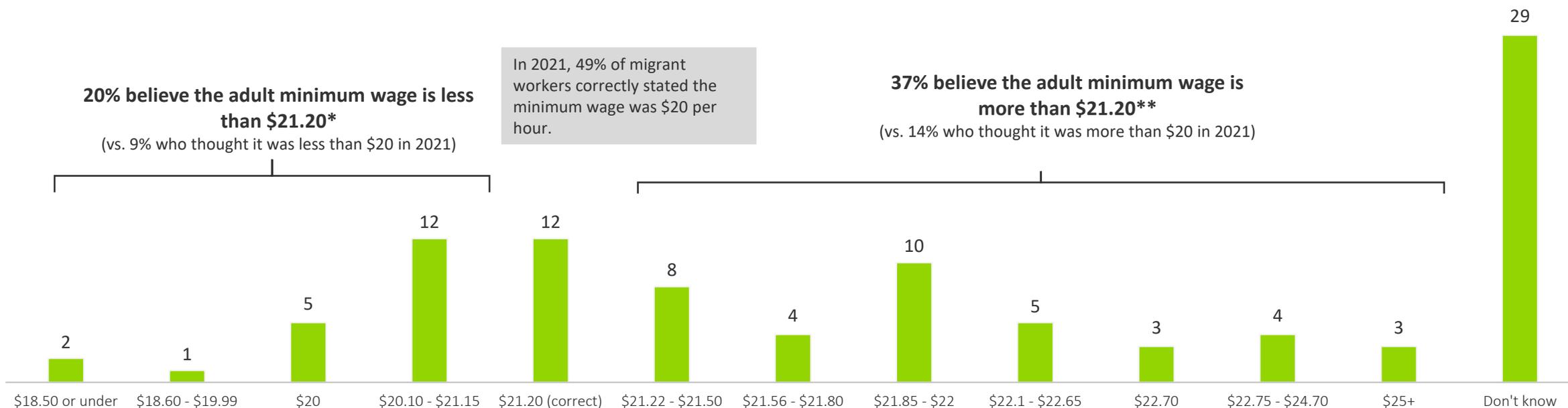


▲ ▼ Significantly higher/lower than 2021

Awareness of the minimum wage has dropped markedly since 2021, and there is greater variability in migrant workers' perceptions of the amount. In 2023, only 12% of migrant workers correctly stated \$21.20 (versus 49% knowing the \$20 minimum wage in 2021). In 2023, a further 20% stated something very close to the minimum wage (between \$20.10 and \$21.50). Just over one in three migrant workers think the minimum wage is higher than it is. Note, both the round number of the minimum wage in 2021, and the timing of the last change in minimum wage (around the time of fieldwork) are likely to have contributed to the marked difference between 2021 and 2023.

Awareness of adult minimum wage

%



* Outliers of 1 and 2 have been excluded from calculation (25 people)

** Outliers of more than 100 have been excluded from calculation (2 people)

How have migrant workers' attitudes shifted since 2021, and what does this mean for their vulnerability to exploitation?

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Encouragingly, while having a job is still essential for the large majority of workers, there has been a weakening in some of the potential attitudinal markers of exploitation.

Compared to 2021, fewer migrants would be willing to tolerate breaches of their employment rights and more expect to enjoy the same conditions as NZ workers.

Workers who have arrived in NZ in the last two years are generally less attitudinally vulnerable to exploitation than those who have been in NZ for three to five years.



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Since 2021, some of the potential attitudinal markers of vulnerability to exploitation have weakened – migrant workers are less accepting of poor working conditions and feel less reliant on their job for residency. This partly explains the growing *capable* segment discussed earlier. More recent arrivals to NZ are generally less attitudinally vulnerable to exploitation, perhaps due to differences in life stage and early expectations. Hospitality workers are still especially likely to have employers who breach employment law.

Attitudinal markers of vulnerability to exploitation (migrant workers)

%



With the exception of 'My employer sometimes does things that are against NZ employment law', migrant workers, who have employers born in NZ, are contributing to these declines.

Workers who have been in NZ for longer (3-5 years) are more likely to have many of these attitudes than those who arrived more recently (in the last 2 years):

- Strong obligation to stay with employer (47%, vs. 37%)
- Essential to stay in job to financially support family (79%, vs. 69%)
- Working conditions are better in NZ (71%, vs. 63%)
- Staying in job is essential to get NZ residency (65%, vs. 51%)
- Not okay to disagree with boss (34%, vs. 27%)
- Can't expect the same employment conditions as NZ workers (28%, vs. 20%)

Higher among Hospitality workers (25%)

■ Agree ■ Strongly agree Total agree

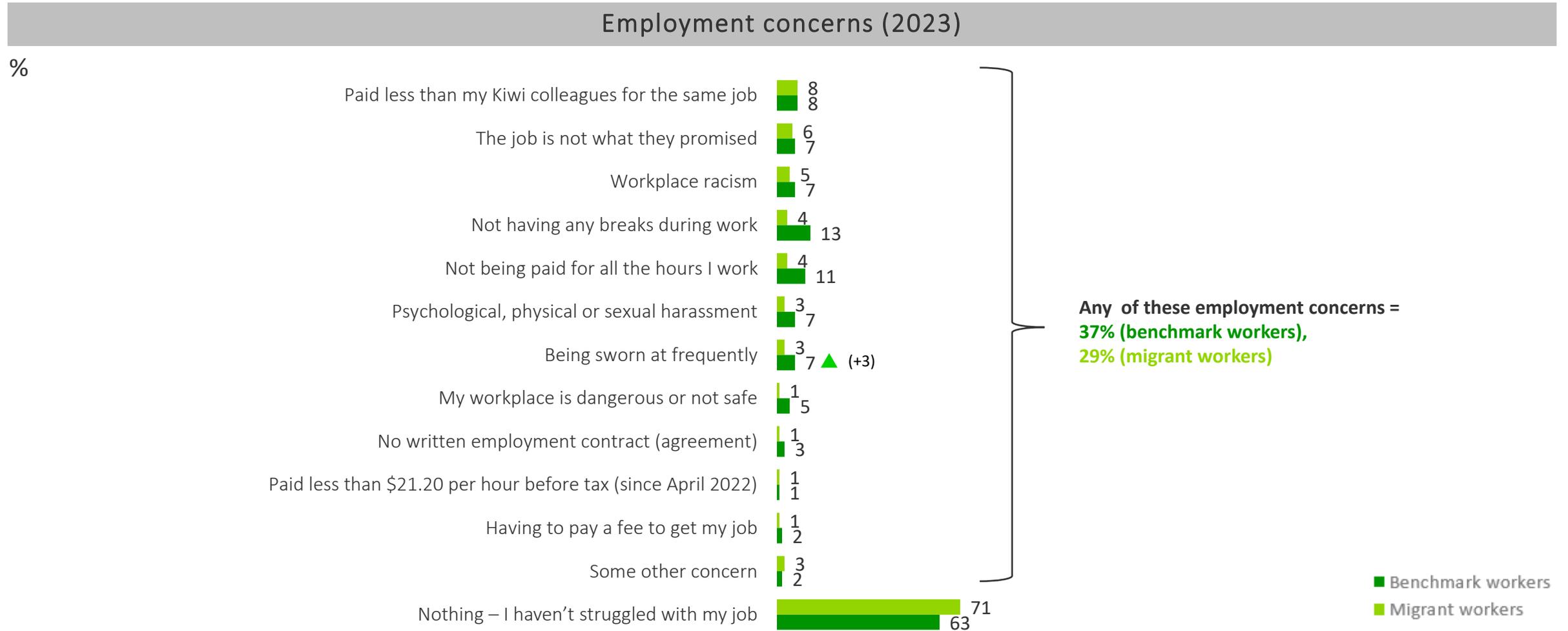
▲ ▼ Significantly higher/lower than 2021

Given the improved knowledge and attitudes, are we seeing more or less evidence of potential exploitation?

Despite the segmentation results showing a shift in a positive direction (a larger *capable* group), we continue to see evidence of potential exploitation. There has been no significant change for either group of workers in the incidence and type of employment concerns they experience. Around a third (or more) of migrant and benchmark workers identified with at least one employment concern.

Further, some migrants work longer hours than they did in 2021, particularly Filipino, Indian, and African workers. This is potentially an upshot of a tighter labour market and more workers in fulltime work.

As in 2021, benchmark workers are more likely than migrant workers to report a number of the problematic employment situations we presented to them (possible reasons for this are on then next page).



In interpreting the employment concerns data, the reader should bear in mind 1) the different industry and occupation profiles of the two groups of workers and 2) possible differences in the interpretation of statements. See explanation below.

Explanation for benchmark workers reporting higher levels of employment concerns than migrant workers

When comparing the differences in results between benchmark and migrant workers, the reader should bear in mind:

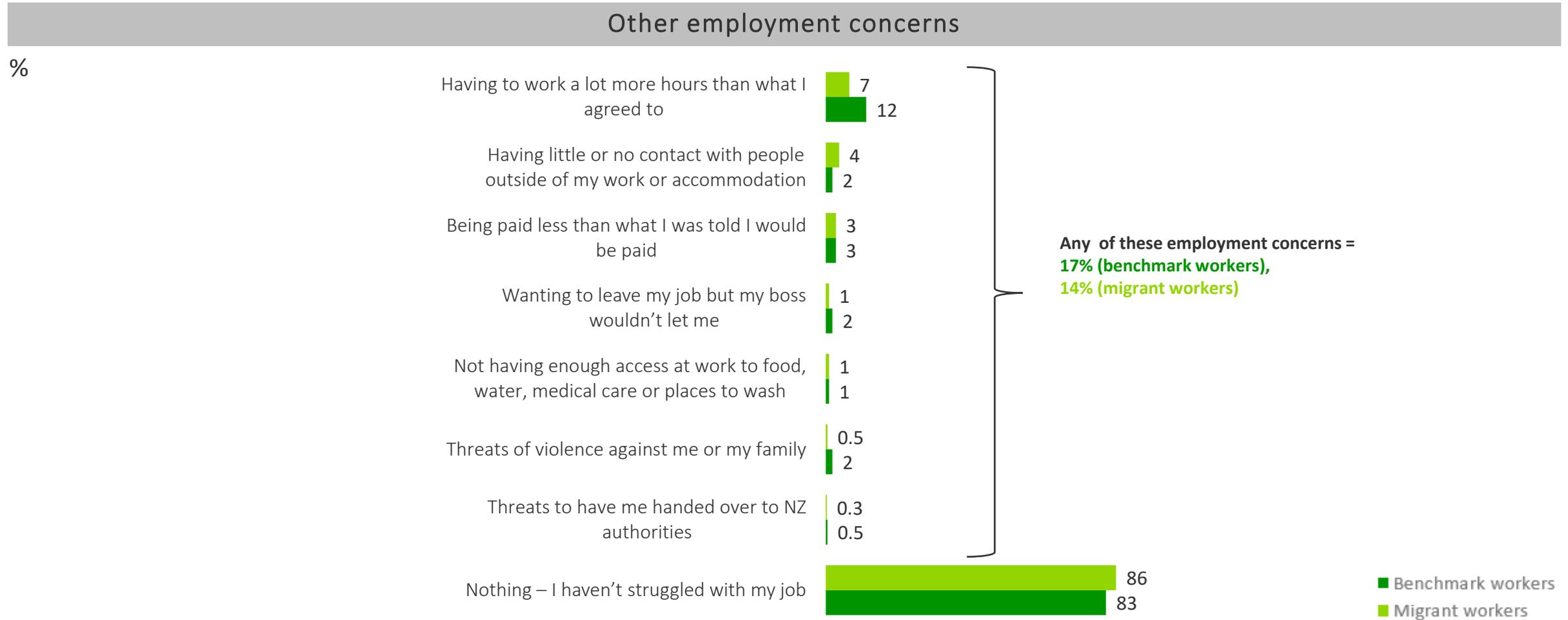
- Benchmark workers are more likely to be frustrated with their employment (see page 33). The differences in industry/occupation profiles of the benchmark worker and migrant worker samples (see pages 83 and 84) and the different mix of salaried vs wage workers.
- Statements may have been interpreted differently across the two survey samples.
 - For example, migrant workers in the migrant worker survey may have answered ‘workplace racism’ with respect to their own personal experience of workplace racism, whereas benchmark workers (the majority of whom were NZ European) may have answered ‘workplace racism’ with respect to their observations of the wider workplace.
 - Likewise, when migrant workers interpret whether they are ‘paid less than my Kiwi colleagues for the same job’ they will likely place an ethnicity lens on the question and ask themselves whether the lower pay is because of their ethnicity, whereas NZ European workers in the benchmark survey (who consider themselves to be ‘Kiwi’) are likely to have thought about whether they are paid less than anyone else in the workplace doing a similar job.

Respondents were shown a list of possible concerns and asked to select which ones applied to them. The concerns shown in the graph on the previous page were shown to both migrant workers and benchmark workers. However, benchmark workers were presented with additional categories when asked this question (not shown on graph or included in the ‘any’ figure. These were:

- Having to work long hours (24%)
- Workplace discrimination other than race (gender, age, disability etc) (9%)
- Having my shifts changed without giving me enough time (9%, up significantly from 6% in 2021)
- Having my hours or days changed without consultation (7%)
- Not being paid properly for working on holidays (5%)
- Having my salary reduced without consultation (1%)

When these additional concerns are taken into account the % of benchmark workers who expressed at least one concern increases to 48%..

This year we asked about some additional employment concerns. Again, benchmark workers are slightly more likely to report these concerns than migrant workers, although not significantly. When we combine these concerns with the concerns on page 43, 38% of benchmark workers and 32% of migrant workers report at least one of the employment concerns presented to them.



Similar to 2021, 4% of migrant workers in 2023 do not have a written employment contract. Groups who are more likely to not have a contract are consistent with 2021.



Migrant workers are working longer hours in 2023 (26% are working more than 40 hours per work, up 3 points since 2021).

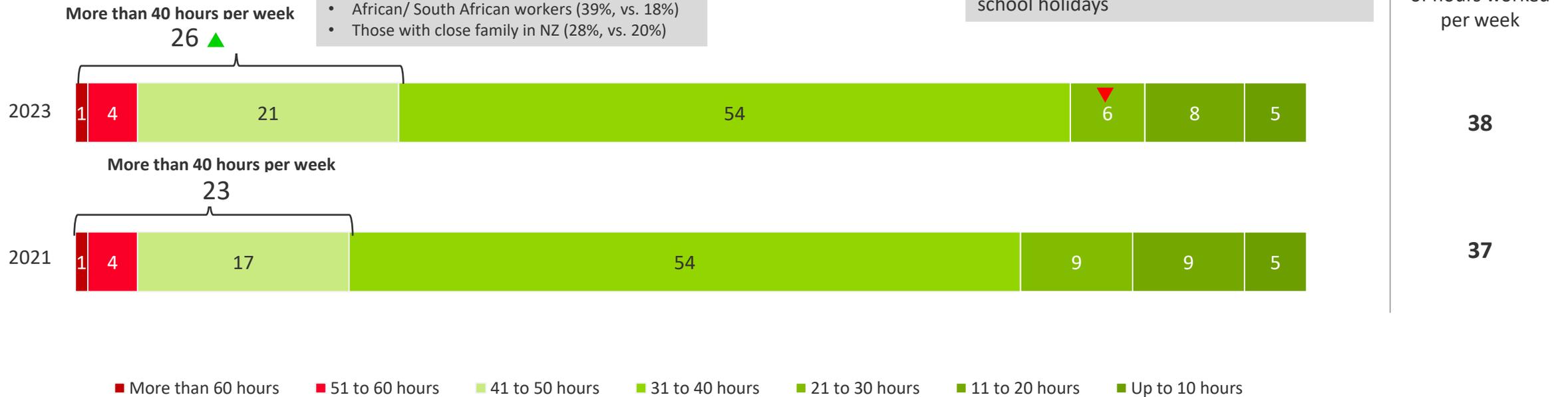
Hours worked each week (migrant workers)

%

Compared to 2021, the following groups are more likely to work more than 40 hours per week:

- Essential skills visa holders (46%, vs. 32%)
- Arrived 3-5 years ago (29%, vs. 21%)
- Aged 35-44 (28%, vs. 20%)
- Filipino workers (45%, vs. 29%)
- Indian workers (28%, vs. 13%)
- African/ South African workers (39%, vs. 18%)
- Those with close family in NZ (28%, vs. 20%)

Students who took part in the survey, work an average of 24 hours per week during school holidays



One percent of migrant workers report being paid less than \$21.20 per hour.

Are workers being paid at least the adult minimum wage?

%

Being paid more than the stated amount is less common among:

- Chinese workers (85%)
- Hospitality workers (83%)
- Workers in businesses with fewer than 10 employees (81%)
- Pacific peoples (79%)
- Student and work visa holders (77%)

Being paid less than the stated amount is more common among:

- Disheartened workers (3%)

2023



■ Paid more than this
 ■ Paid exactly this amount
 ■ Paid less than this
 ■ Not sure
 ■ I have not been employed since 1st April 2021

Note, due to respondent confusion in 2021, the phrasing of the question was changed to only refer to hourly pay (rather than weekly and hourly rates). Therefore, we have not shown 2021 results as they are not directly comparable to 2023.

Have trust levels shifted?

Migrant workers' trust in organisations (their employer, Employment NZ and Immigration NZ) is consistent with 2021.

However, negative sentiment towards NZ Government agencies in their support of migrant workers has grown a little since 2021.

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Since 2021, there has been no change in the level of trust migrant workers have in their employer, Immigration NZ, or Employment NZ.



Negative sentiment towards government agencies has grown a little since 2021 (31%, up 4 points since 2021). Health workers, who stood out as having higher than average *strongly negative* perceptions in 2021, hold more moderate perceptions this year. The straight-to-residence pathway for healthcare workers in late 2022 may have contributed to this improvement.

Rating of NZ government agencies (among migrant workers who know enough about them)

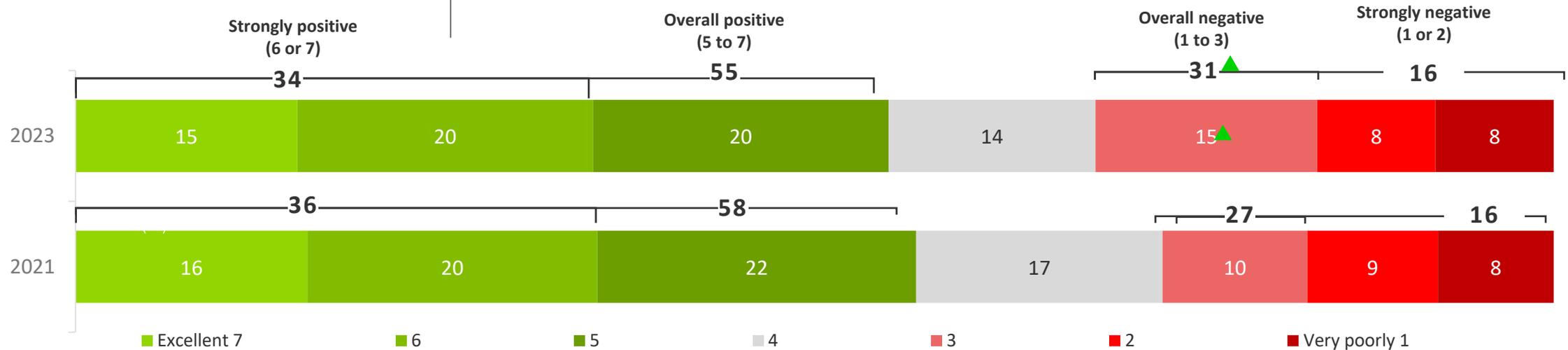
%

Strongly positive perceptions are higher among:

- Filipino workers (70%)
- Pacific workers (65%)
- Construction workers (53%)
- Have close family or relatives in NZ (42% vs 29% of those who do not)
- Men (41%, vs. 26% of women)

The proportion of health workers with strongly negative perceptions has declined (11%, vs. 30% in 2021)

Strongly negative higher among Chinese workers (22%)



▲ ▼ Significantly higher/lower than 2021

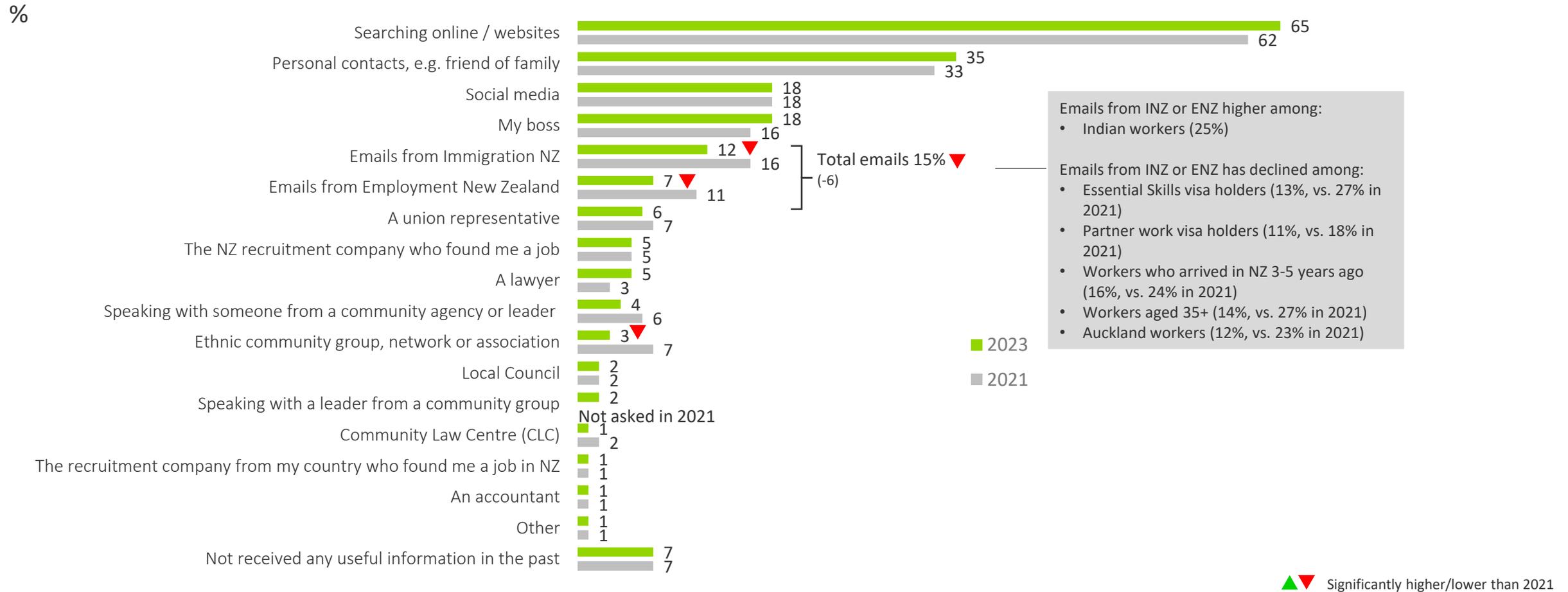
How do workers find out about employment rights in New Zealand?

An online search is still the key way migrant workers find out about their employment rights and fewer rely on INZ or ENZ emails as useful sources compared to 2021.

Workers are a little less likely to find government websites ‘extremely useful’ for guidance on employment rights. Despite a weakening in ratings of the Immigration NZ website, it remains the most trusted source for employment information.

Slightly fewer migrant workers find INZ and ENZ to be useful sources of information about employment rights in 2023. Older workers, who have been in NZ for longer and those on essential skills or partner work visas are behind this decline since 2021. Online remains the key source for useful information.

Sources of useful information

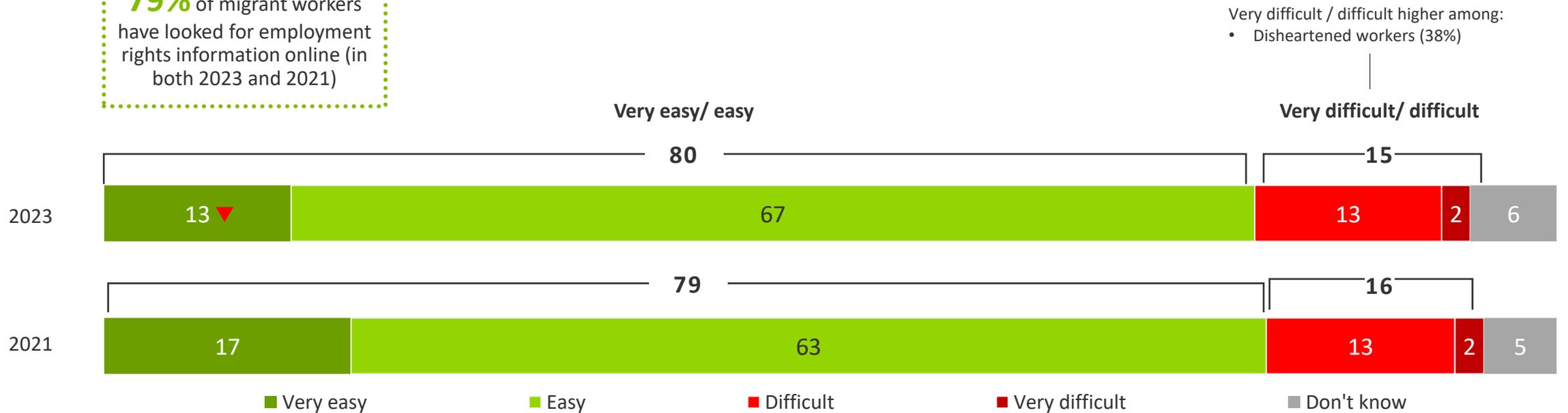


Overall ease of finding information about employment rights online is steady with 2021, although this year more migrant workers report finding it 'easy' rather than 'very easy'.

Ease of finding information about employment rights online (among those who searched online)

%

79% of migrant workers have looked for employment rights information online (in both 2023 and 2021)



▲ ▼ Significantly higher/lower than 2021

Consistent with 2021, Immigration NZ’s website is the most visited website for information about employment rules and regulations, followed by the Employment NZ website (although fewer have visited this site since 2021). Just over half of migrant workers have visited the New Zealand Now website.

Visitation of websites for information about employment rights

%



▲ ▼ Significantly higher/lower than 2021

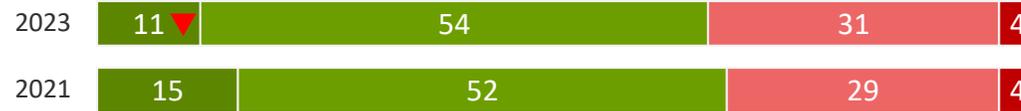
The ENZ website is perceived to be the most useful website for employment rights. Fewer find the INZ and NZ Now websites useful than in 2021, driven by a decline in *extremely useful* ratings.

Usefulness of websites as sources of information about employment rights

%

Extremely / very useful

Employment NZ
(www.employment.govt.nz)



65

67

Immigration NZ
(www.immigraton.govt.nz)



55 ▼

60

New Zealand Now
(www.newzealandnow.govt.nz)



56

60

Another website



44

47

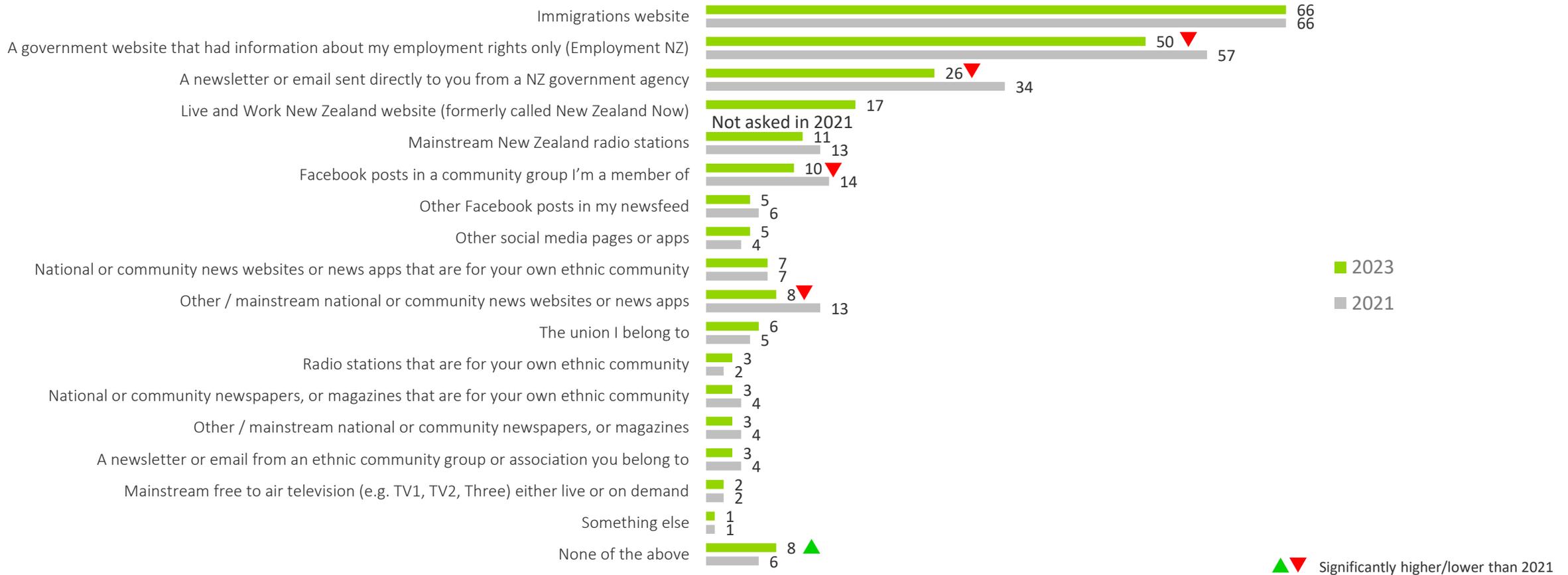
■ Extremely useful ■ Very useful ■ Slightly useful ■ Not useful at all

▲ ▼ Significantly higher/lower than 2021

Despite the decline in perceived usefulness, Immigration NZ’s website continues to be the most trusted source of employment law information for migrant workers. Government websites and emails are less trusted than in 2021. However, this comparison should be interpreted with caution as this year we added a new source ‘Live and Work NZ website’ so respondents who previously would have selected a government website or email option, may have selected ‘Live and Work NZ’ website instead.

Most trusted sources of employment law information

%



How do workers feel about 'speaking up' in 2023?

Migrant worker awareness of the migrant exploitation protection visa has dropped, perhaps due to the launch activity tapering off. However, this does not seem to have impacted how workers feel about speaking up.

As noted earlier, migrant workers feel a little better about the idea of speaking up than they did in 2021. However, some groups are especially likely to express a sense of fear about doing this (such as South American and hospitality workers).

Both migrant and benchmark workers who are scared to speak up fear retaliation and negative consequences. Some migrants fear deportation.

Awareness of the migrant exploitation protection visa has declined since 2021 (down 11 points to 16%). When the survey was undertaken in 2021, the visa had only recently been launched and may have had greater visibility for migrants.

Awareness of migrant exploitation protection visa

%

Lack of awareness more common among:

- Arrived up to two years ago (88% not aware, vs. 82% of workers who arrived 3-5 years ago)
- European workers (93% not aware)
- Student and work visa holders (93% not aware)
- Naïve but unexploited workers (92% not aware)

▲
84%
(+11)

Not aware



Aware

▼ **16%**
(-11)

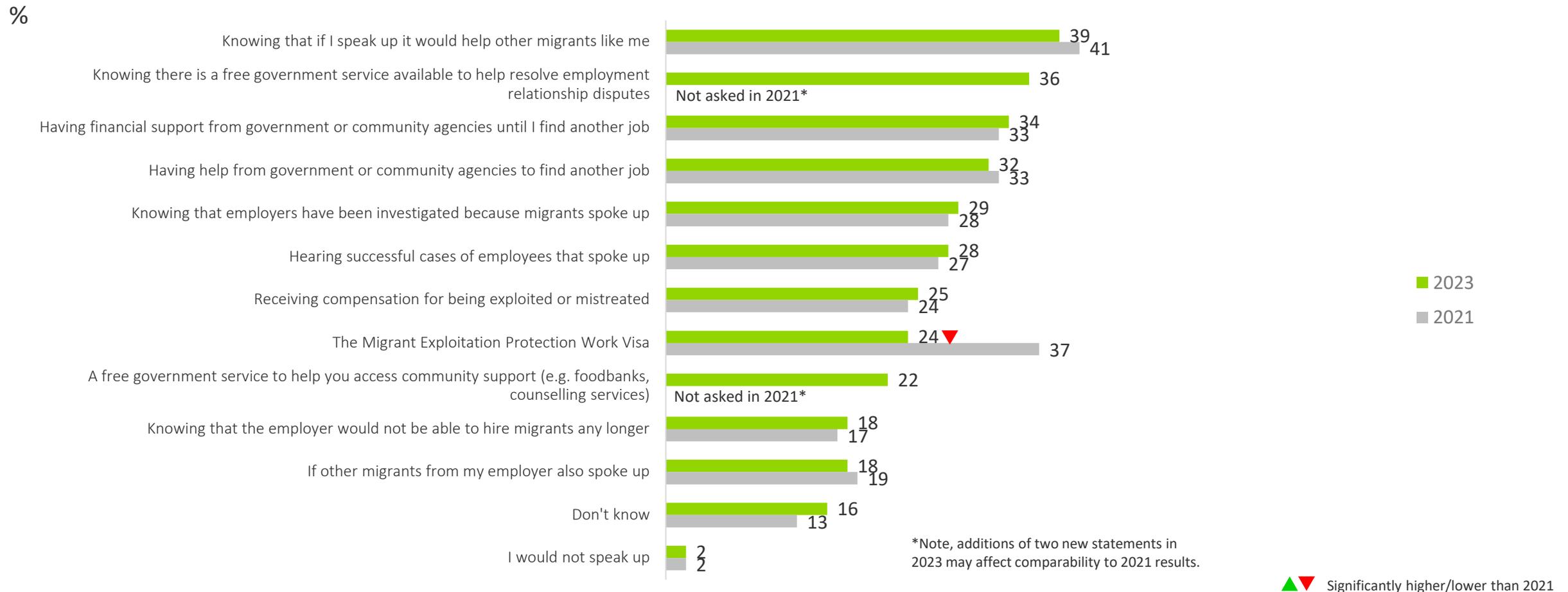
Awareness higher among:

- Construction workers (24%)
- Workers in businesses with fewer than 50 employees (20%, vs. 13% of those in businesses with 50+ employees)
- Indian workers (24%, but down from 47% in 2021)
- Chinese workers (24%)
- Indian workers (24%)
- Belong to an ethnic association or migrant community group (22% vs 15% who do not belong to a group)

▲ ▼ Significantly higher/lower than 2021

Knowing they would help others remains a key driving force for encouraging some migrants to speak up against exploitation. Newly tested this year, the concept of a free government service to help with employment disputes would encourage about a third of migrant workers to speak up. Significantly fewer migrant workers feel the MEPV would encourage them to speak up (likely related to lower awareness of the visa).

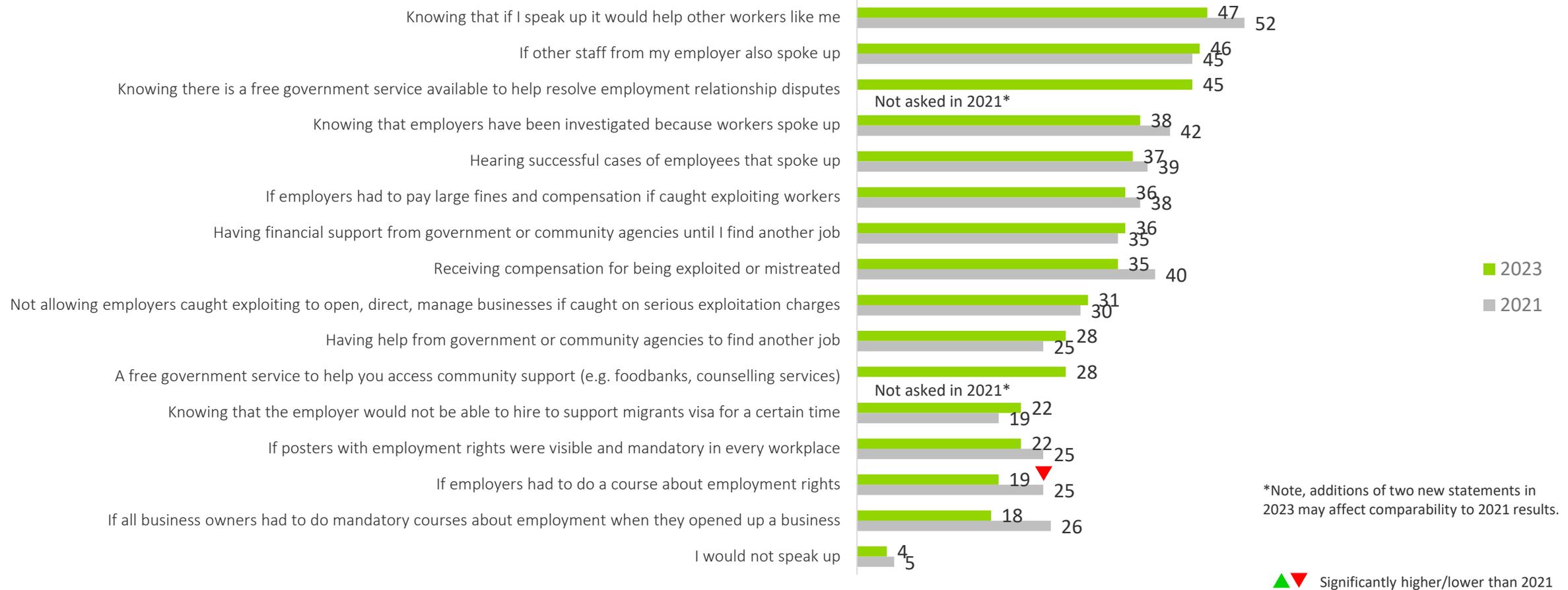
Encouraging migrant workers to speak up against exploitation



A sense that the worker is helping other workers also appeals to benchmark workers. More so than migrant workers, benchmark workers would be motivated to speak up if others did too.

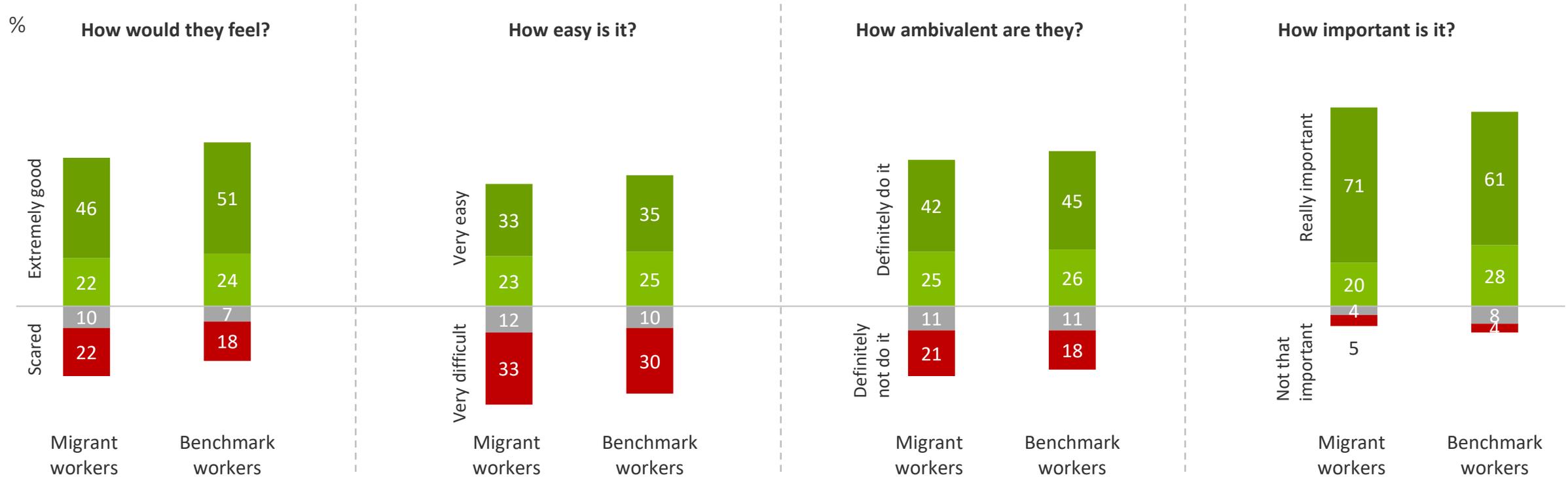
Encouraging workers to speak up against exploitation (benchmark workers)

%



Despite migrant workers placing more importance on speaking up in exploitative situations, benchmark workers feel slightly better about doing so (75%, vs. 68% of migrant workers).

Commitment to speaking up in a situation where an employer is not giving you all your employment rights under the New Zealand employment law



The following groups of migrant workers are more likely to be scared to speak up:

- South Americans (40%)
- Hospitality workers (32%)
- Women (28%, vs. 16% of men)
- Workers who have no close family or relatives in NZ (25%, vs. 19% of those who do)

Base: 2023 Migrant workers (n=1,024), Benchmark workers (n=955).

Source: Migrant worker survey, Q22b-22e

The figures in the bar chart are sourced from questions using an 11 point scale. Dark green is the % who gave a rating of 8-10, light green is the % who gave a rating of 6 or 7, grey is the % who gave a rating of 5, and red is the % who gave a rating of 0 to 4.

As shown on the previous page, 22% of migrant workers would be scared to speak up in a situation where their employment rights were being breached. When asked why, the key theme is a fear of retaliation or negative consequences i.e. deportation or missing out on gaining residency status. Notably, this group has lower than average awareness of the MEPV (9%, vs. 18% of those who feel better about speaking up). Language/ cost barriers, a distrust of authorities, or lack of knowledge or uncertainty about employment rights also act as barriers to speaking up, while prior bad experiences can prevent a few from coming forward again.

Reasons for being scared to speak up... in their own words (migrant workers)

“ Fear of retaliation or negative consequences

“I fear they would not care and that the business would retaliate against me. I have worked at 2 jobs here and was severely mistreated by both places. I had pay withheld by one even. I didn't know my rights then and even now I still won't report them as it's too late and I know nothing would happen to rectify it or change it in the future.”

“Our visas being tied to a certain workplace leaves us with a lot of uncertainty and have been told by many people in the past that authorities do not always favour migrant workers.”

“It may put my visa status at risk so it is more important to me that I stay in the country.”

“Being on a work visa and fearing losing a job and subsequently the chances of residency is a huge factor for migrants.”

“In case someone at my work found out and there were repercussions for me e.g losing my job, not being able to find another job etc.”

“My visa ties me to my role within 1 company branch. Making an official complaint would make my work place very difficult. It could also have an impact on my visa or residency application.”

“As a foreigner, I feel that NZ authorities would side with the locals more than the foreigners. Even if it is a confidential report, the employer would still be able to figure out that who is the one who reported the situation and potentially make things harder for me at work. Lastly, it leaves a record on my file and it would make things harder in the future in terms of getting another job or even applying for another visa.”

Language or cost barriers

“1. English is not my first language; it could be hard to explain everything. 2. as an immigrant I feel like I am less than New Zealander, so there might not be willingness to help me in the same way as New Zealander.”

“The visa is tied to a specific employer - while the complaint is being processed, I may be left without a job. I can't pay for food and rent. Also, the services of a lawyer are expensive - there is no way to protect your rights.”

Distrust in authorities

“I'm afraid the authorities will not take me seriously, and/or the employer will pay them off.”

“Because I find NZ authorities or systems most of the time not helpful and supportive and I feel I am not fully supported to advocate for my rights or get my voices heard given my previous experience with the public services and the police”

Uncertainty

“Being unsure about my rights and whether I am truly in a position to query my employer.”

“I'm not a New Zealand resident. So I don't have much knowledge about working rights”

Prior bad experiences

“I have spoken to NZ authorities in prior employment, but they were not helpful and when a complaint was launched, I never heard back from them.”

For the 18% of benchmark workers who said they would be scared to speak up, a fear of retaliation or negative consequences was also the key theme. However, benchmark workers were worried about different types of retaliation to migrant workers e.g. negative impacts on future work opportunities, avoiding trouble, or employer backlash. Like migrant workers, there is also an element of uncertainty and distrust of authorities.

Reasons for being scared to speak up... in their own words (benchmark workers)



Fear of retaliation or negative consequences

"May badly effect working environment, live in small town, other employers would not want to hire if they found out I had complained to authorities"

"I would be afraid I would lose my job"

"Because the repercussions from my employer would be worse over time. They discretely prevent people from promotions or other opportunities if u speak up"

"I would feel uncomfortable that the employer would find out it was me and confront me about it with disciplinary action."

"Because the threat of losing my job is very real. And it becomes my word against my employer's word and he has the money to fight me in court if it came to that. There's not a lot of hospitality business owners who treat their staff well in my experience. But it's an industry where we can be replaced so easily"

"Fear of being disadvantaged by current employer or by being held responsible for things out of my control"

"I'd be afraid that my employer would find out. They might also get into trouble and then they go under, then I'm left without a job."

Distrust in authorities

"Because I have in the past and NZ Authorities are to tied down by paperwork and governmental regulations to be of much assistance. In other words, they don't put the people first."

"Don't trust they could resolve anything. Just make things worse."

Too difficult

"Not very comfortable with confrontation, a fear of getting in trouble or getting it wrong."

"If you have no hard evidence there is a chance no one will believe you."

Uncertainty

"I would be unsure of what was going to happen and what the steps would be and what it would mean for me as well as what I would have to do and that would make me nervous and scared."

How well supported are migrant workers?

There has been no material change in how supported migrant workers are in New Zealand; the majority do not have family support here or belong to a union or community group.



Compared to 2021, around four in ten migrant workers have close family or relatives living in New Zealand.

Family support in New Zealand (migrant workers)

%

55%

(vs. 60% in 2021)

No, don't have close family or relatives living in NZ

No family support is higher among:

- Younger workers (63% of 18-34 year olds)
- Essential skills visa holders (63%)



Yes, have close family or relatives living in NZ

45%

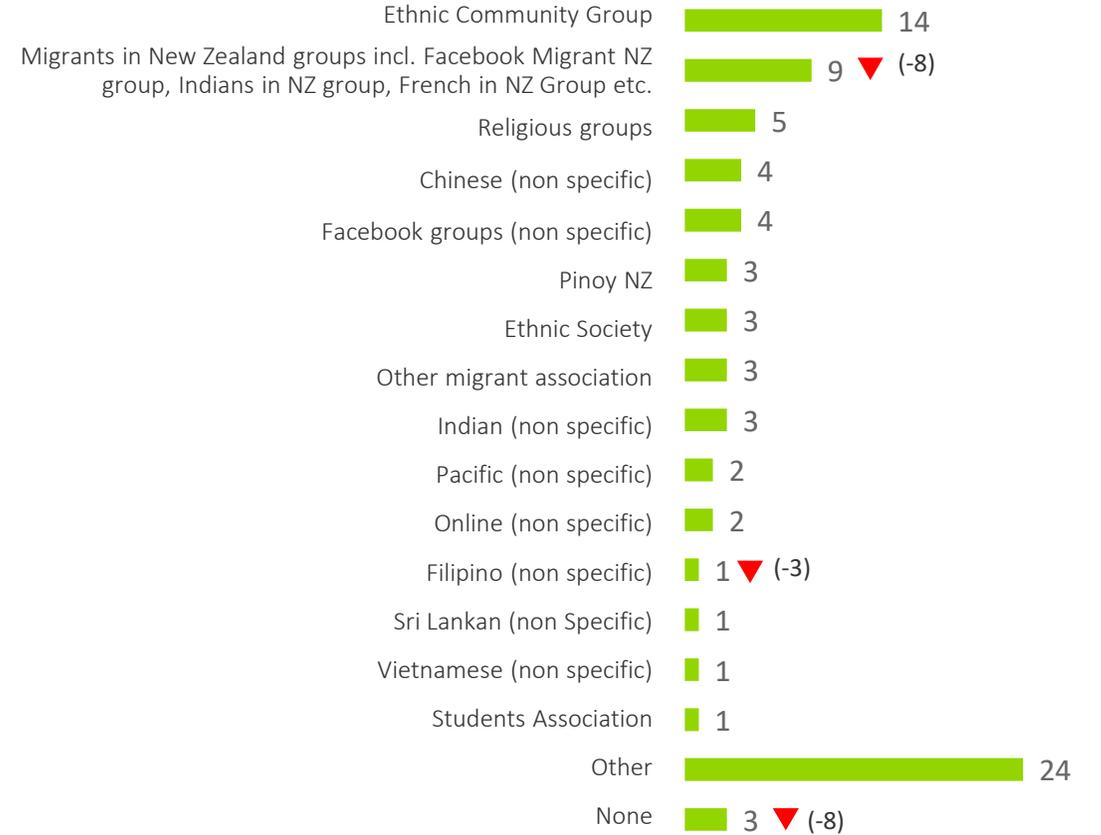
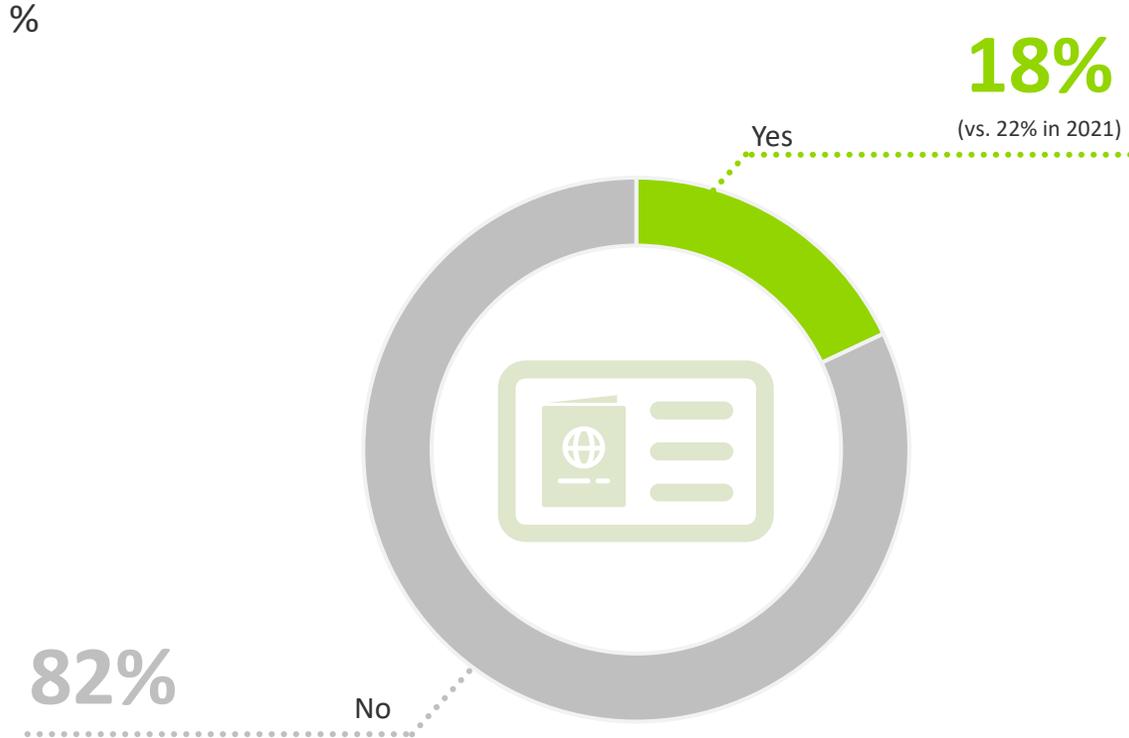
(vs. 40% in 2021)

Family support is higher among:

- Pacific workers (92%)
- Workers aged 45+ (64%)
- Partner work visa holders (59%)
- Live in Waikato (57%)
- Filipino workers (58%)
- African / South African workers (58%)
- Workers aged 35-44 (52%)

And about one in five migrants continue to belong to an ethnic association or migrant community group.

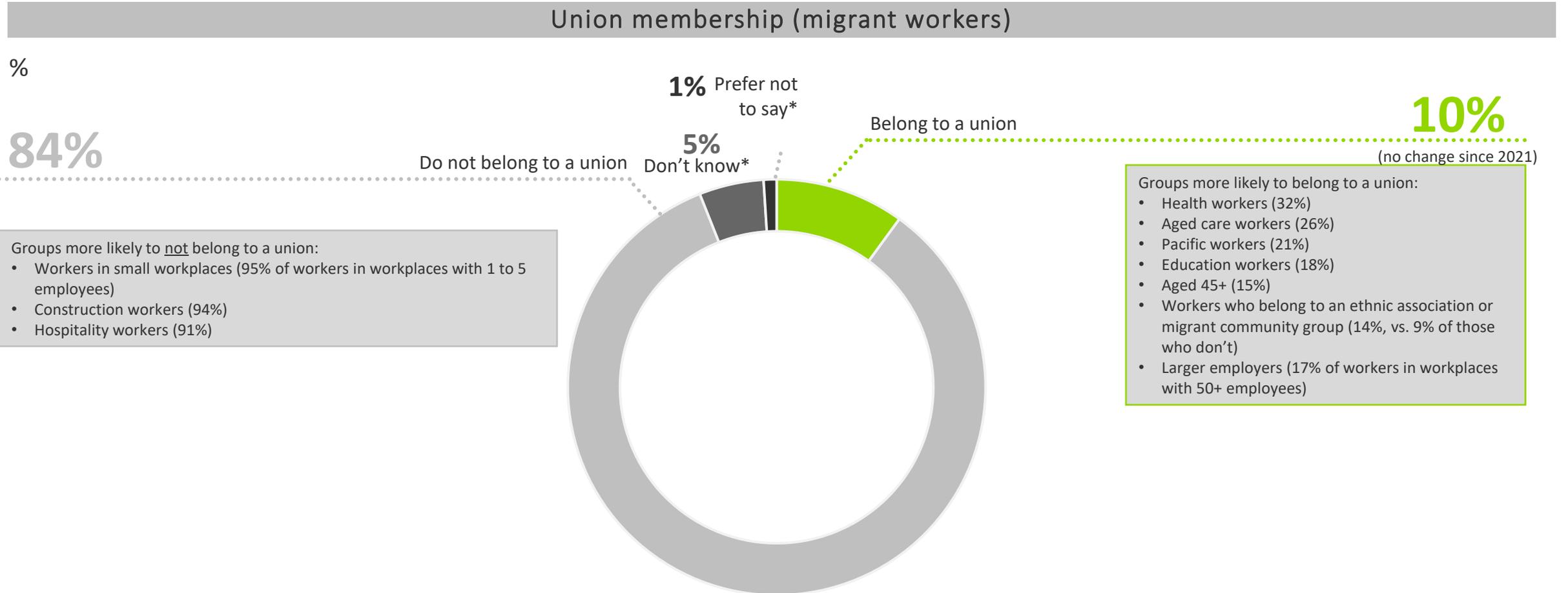
Ethnic / migrant group membership



Base: 2023 Migrant workers (n=1,024)
 Source: Migrant worker survey
 Q28i. Do you belong to an ethnic association or migrant community group in New Zealand?

*Other includes a disparate range of responses, with little in common.

Union membership among migrant workers has not grown since 2021.



*Note, categories 'Don't know' and 'prefer not to say' were added in 2023. Therefore, no comparisons for the option 'Do not belong to a union' can be made between 2021 and 2023)

How would workers like to find out about their employment rights?

Workers still expect proactive communication about their employment rights during all stages of their visa application.

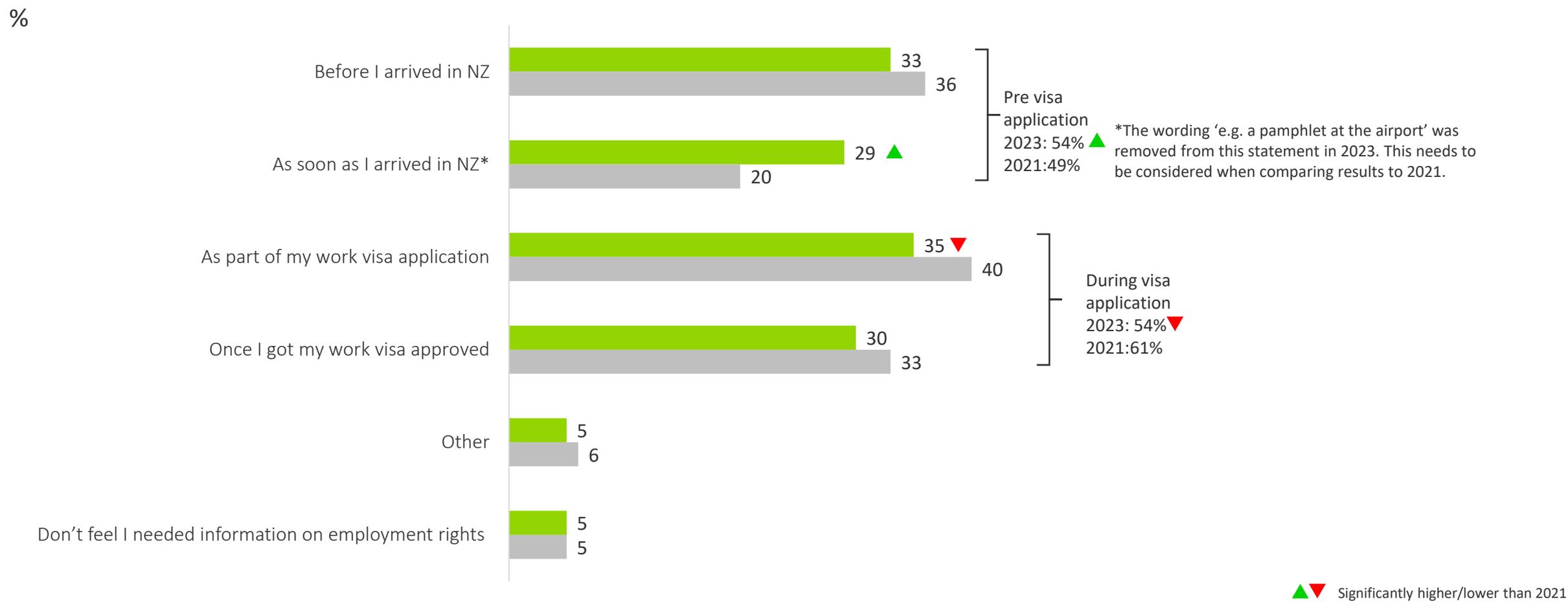
A free government disputes resolution service was very well received by migrant workers.

A range of employment law is important although demand for regular updates on employment or immigration law has weakened a little since 2021.

Slightly more workers would like information in their own language and, like in 2021, this is desired predominantly by Chinese workers.

There is still a need for information about employment rights at multiple points of a migrant’s journey.

Best time to get information about employment rights in New Zealand (migrant workers)



Three quarters of migrant workers would find a free government disputes resolution service helpful, as well as a dedicated employment rights/obligations website.

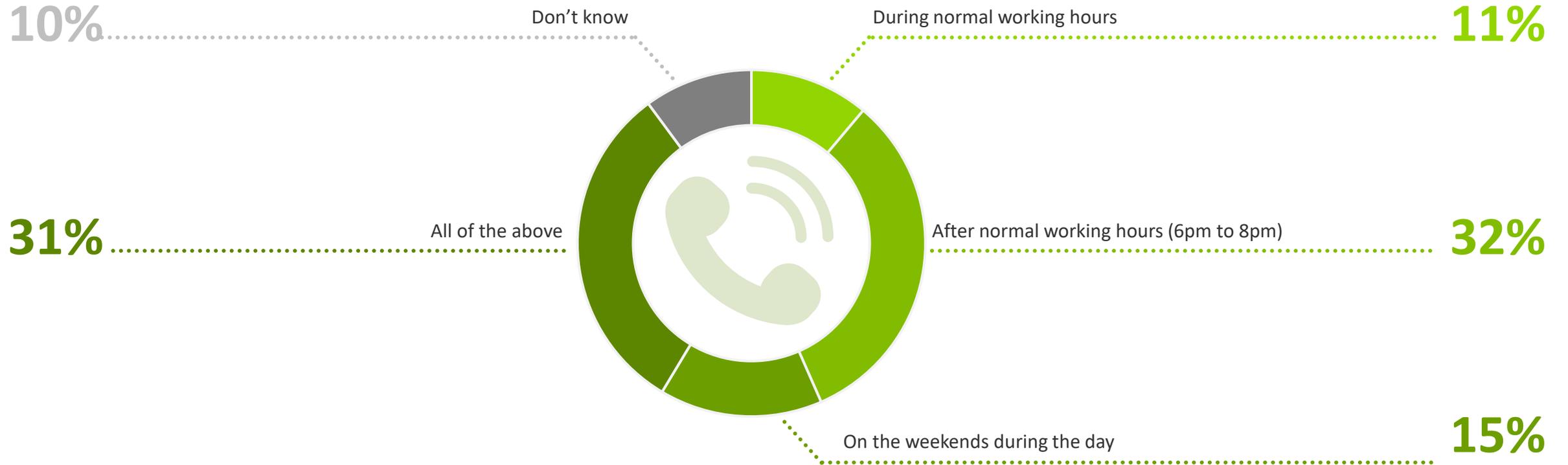
Getting information and support about employment rights (migrant workers)



To meet migrant worker needs, a freephone would need to be available both inside and outside of normal working hours and days.

Best time to call a freephone (Among workers who say a freephone would be helpful)

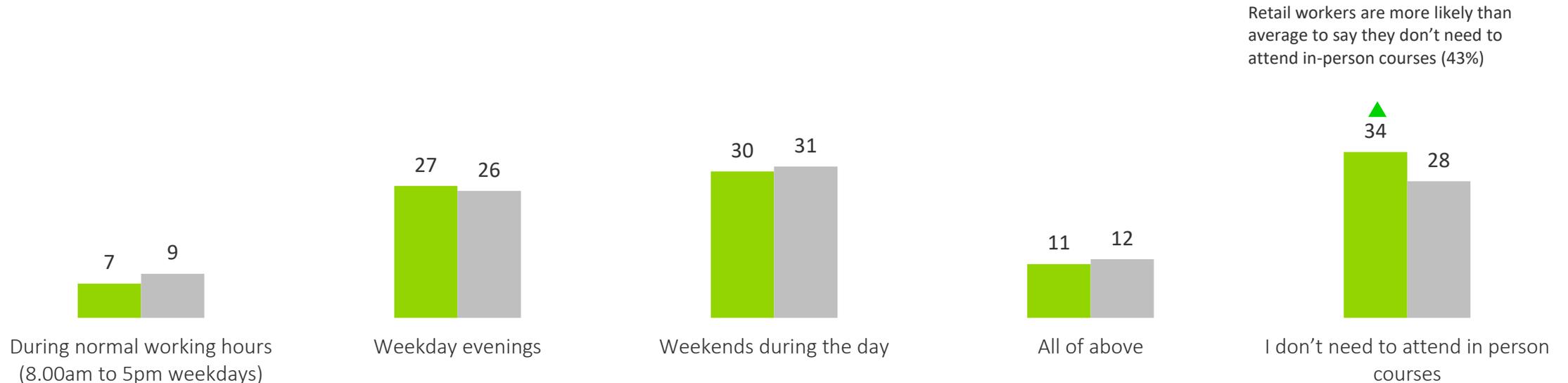
%



Weekends or weekday evenings are still the best times for migrant workers to attend in-person courses or live webinars. Compared to 2021, significantly more don't feel they need to attend these in-person courses. This is likely to be driven by a growing interest in online participation.

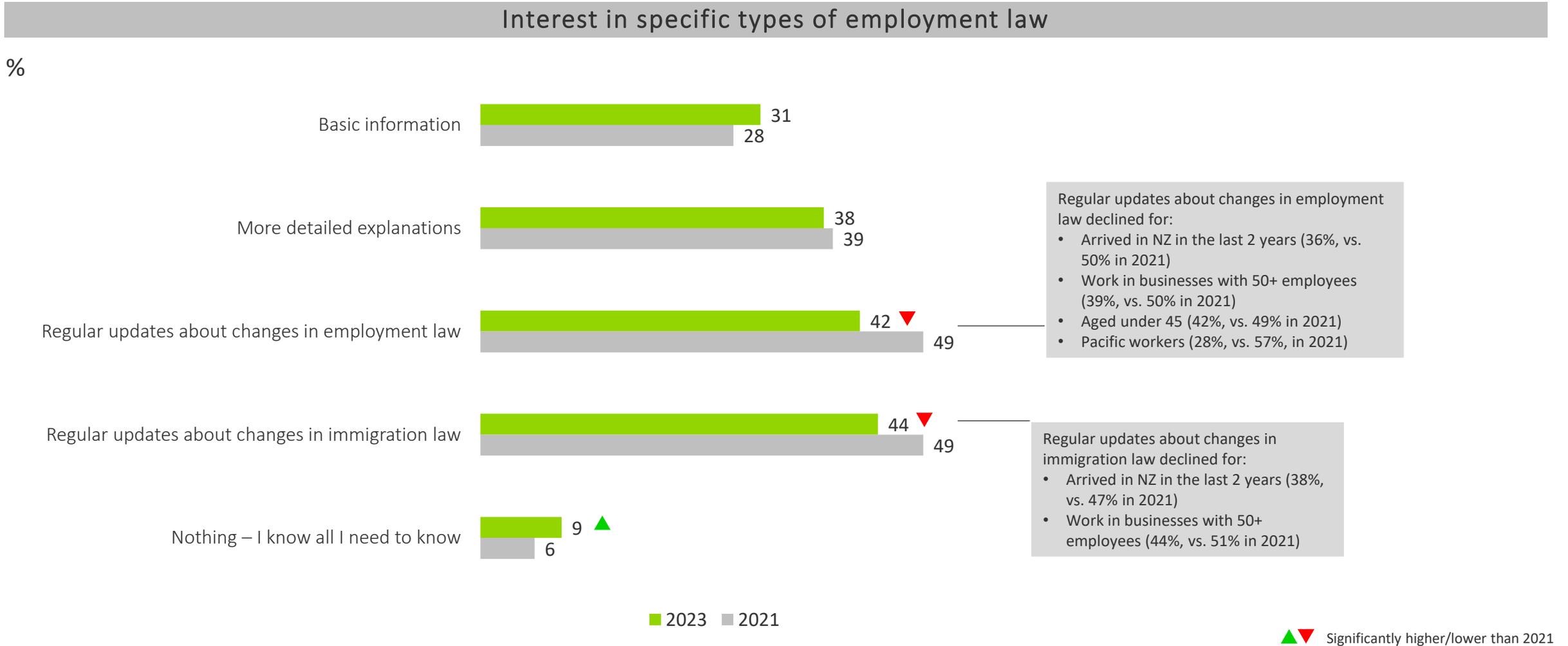
Best time for in-person courses and webinars (among workers who said these would be helpful)

%

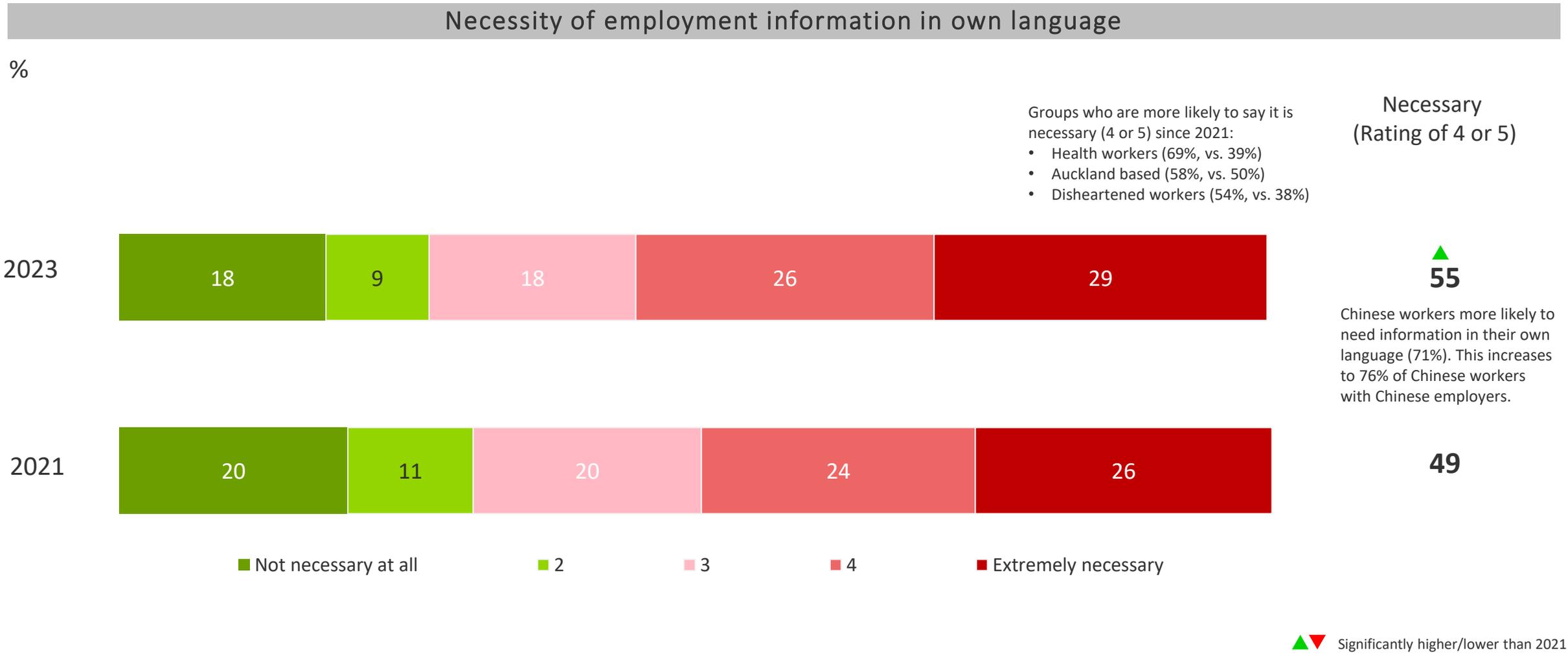


▲ ▼ Significantly higher/lower than 2021

As in 2021, information needs to be provided in a variety of formats to meet the needs of most workers. 2023 demand for updates on employment or immigration law is a little weaker than in 2021.



Just over half of migrant workers would like employment information in their own language; an increase on 2021 (despite the somewhat higher English literacy levels of the 2023 survey sample – see page 11). Chinese workers continue to be most likely to need employment information in their own language.



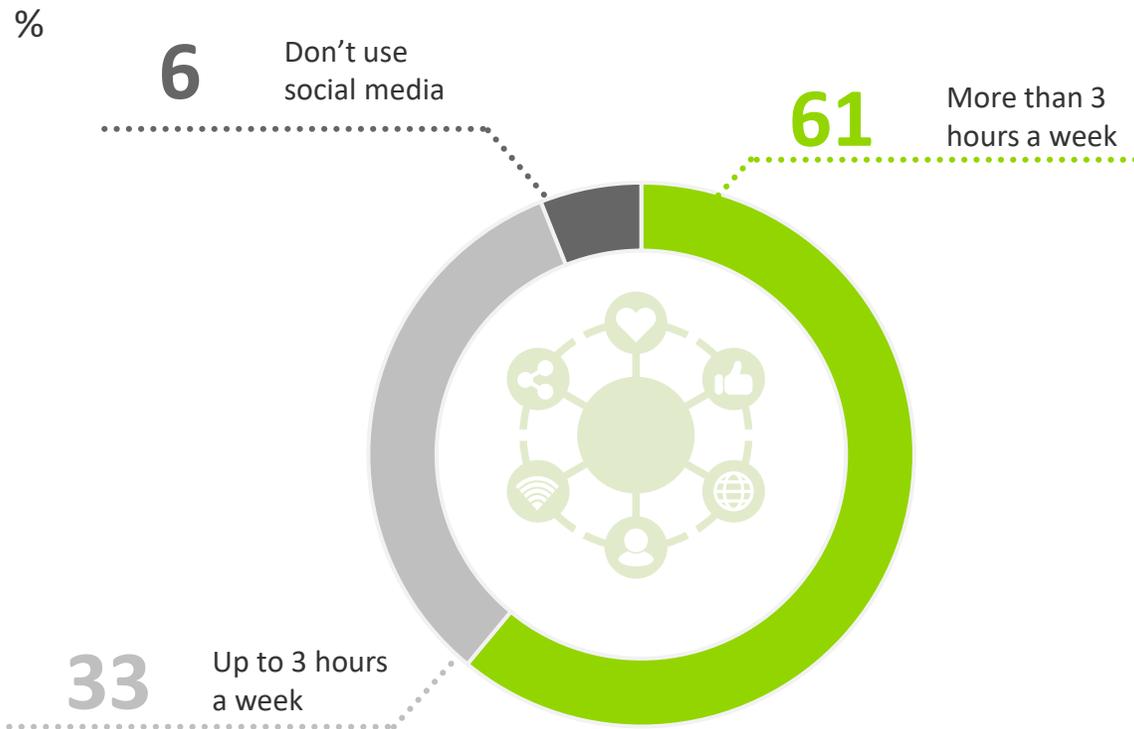
What media do migrant workers use?

There has been little change in migrant workers' use of media. Social media, mainstream media, and community media (especially for key ethnic groups) remain important channels.

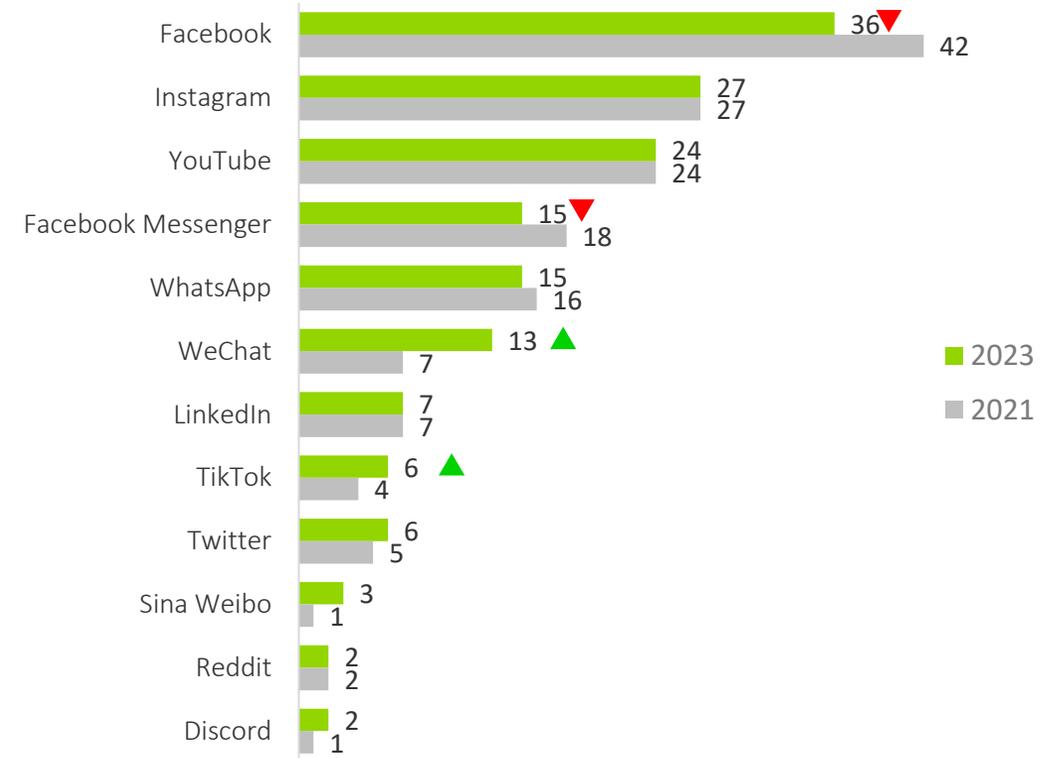


Similar to 2021, six in ten migrant workers use social media for at least three hours a week. The popularity of social media channels have shifted somewhat; fewer use Facebook incl. Messenger and more use WeChat and TikTok.

Social media use



Base: All migrant workers (n=1,024)
 Source: Migrant worker survey
 Q28B. Do you look at social media pages or apps for...



Base: All migrant workers 2023 (n=1,024), 2021 (n=964)
 Source: Migrant worker survey
 Q28G. What social media sites or apps do you use most weeks?

While Facebook is one of the top three social media sites used regardless of ethnicity, there continues to be variation in other social media sites used depending on ethnicity. The top three sites for each group remain the same as in 2021 (with the exception of ‘another ethnicity’ – Youtube replaces WhatsApp in the top three)

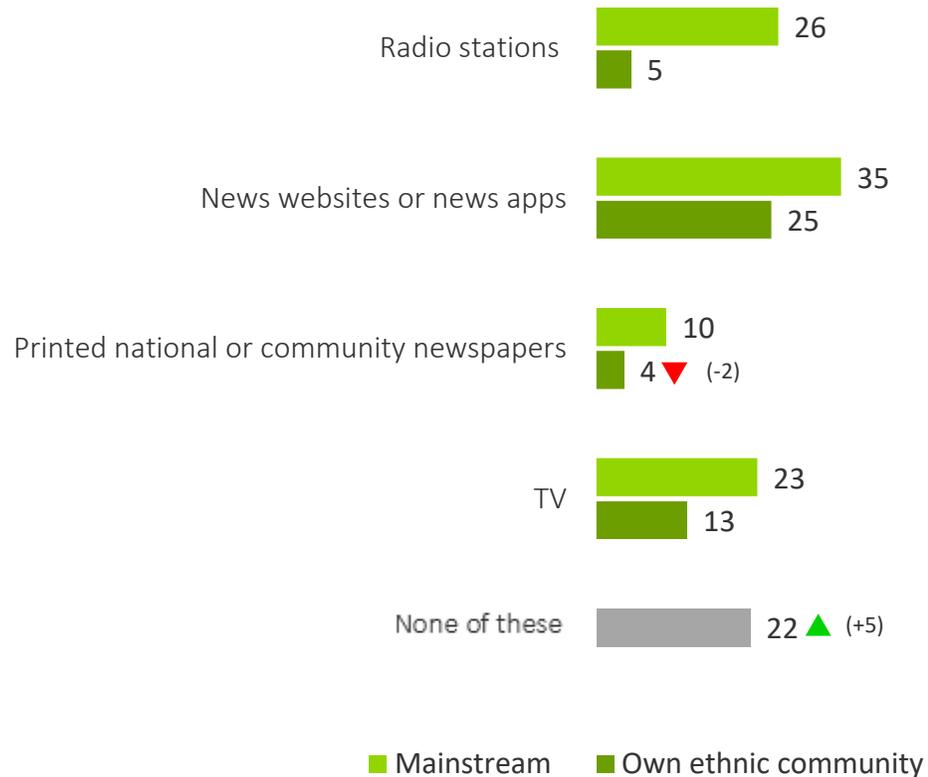
Social media sites by worker ethnicity (2023)

	Base	Chinese	Filipino	Indian	European incl. Great Britain / Ireland	Pacific peoples	South East Asian	African / South African	South American	Other Asian	Another ethnicity
Base	(1,024)	(244)	(60)	(103)	(227)	(53)	(53)	(79)	(48)	(84)	(53)
Facebook	36%	28%	35%	36%	39%	32%	36%	42%	46%	35%	43%
Instagram	27%	21%	12%	34%	34%	13%	27%	14%	54%	20%	28%
YouTube	24%	31%	23%	22%	24%	15%	22%	20%	25%	21%	19%
WhatsApp	15%	4%	2%	24%	24%	2%	7%	27%	27%	13%	15%
Facebook Messenger	15%	8%	25%	5%	28%	19%	13%	17%	4%	14%	17%
WeChat	13%	54%	-	-	1%	-	-	-	-	4%	2%
LinkedIn	7%	8%	2%	13%	4%	6%	9%	8%	4%	10%	2%
TikTok	6%	10%	3%	6%	8%	4%	7%	-	-	6%	6%
Twitter	6%	7%	2%	5%	5%	2%	13%	3%	8%	5%	9%
Sina Weibo	3%	11%	-	-	0%	-	-	-	-	-	2%
Reddit	2%	3%	-	1%	6%	-	2%	-	-	-	9%
Discord	2%	3%	-	1%	3%	-	2%	-	2%	-	2%
Telegram	1%	-	-	1%	1%	-	-	-	2%	1%	-
SnapChat	1%	1%	-	-	3%	4%	2%	-	-	1%	2%
Pinterest	1%	0%	-	1%	2%	-	2%	1%	2%	-	-
Twitch	1%	1%	-	-	0%	-	-	-	4%	-	-

Fewer migrant workers consume mainstream media than in 2021. Around four in ten continue to consume media from their own ethnic community, although fewer read ethnic newspapers.

Other media used for at least three hours a week

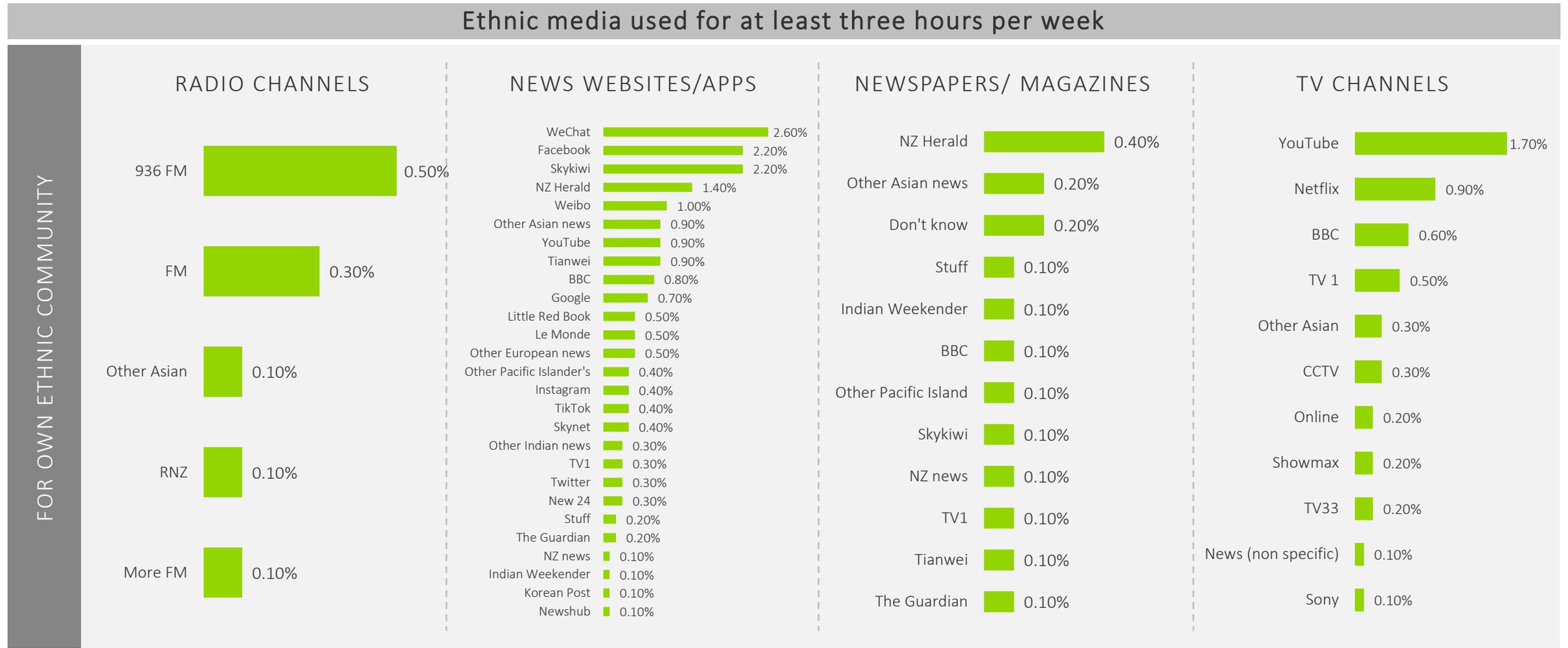
%



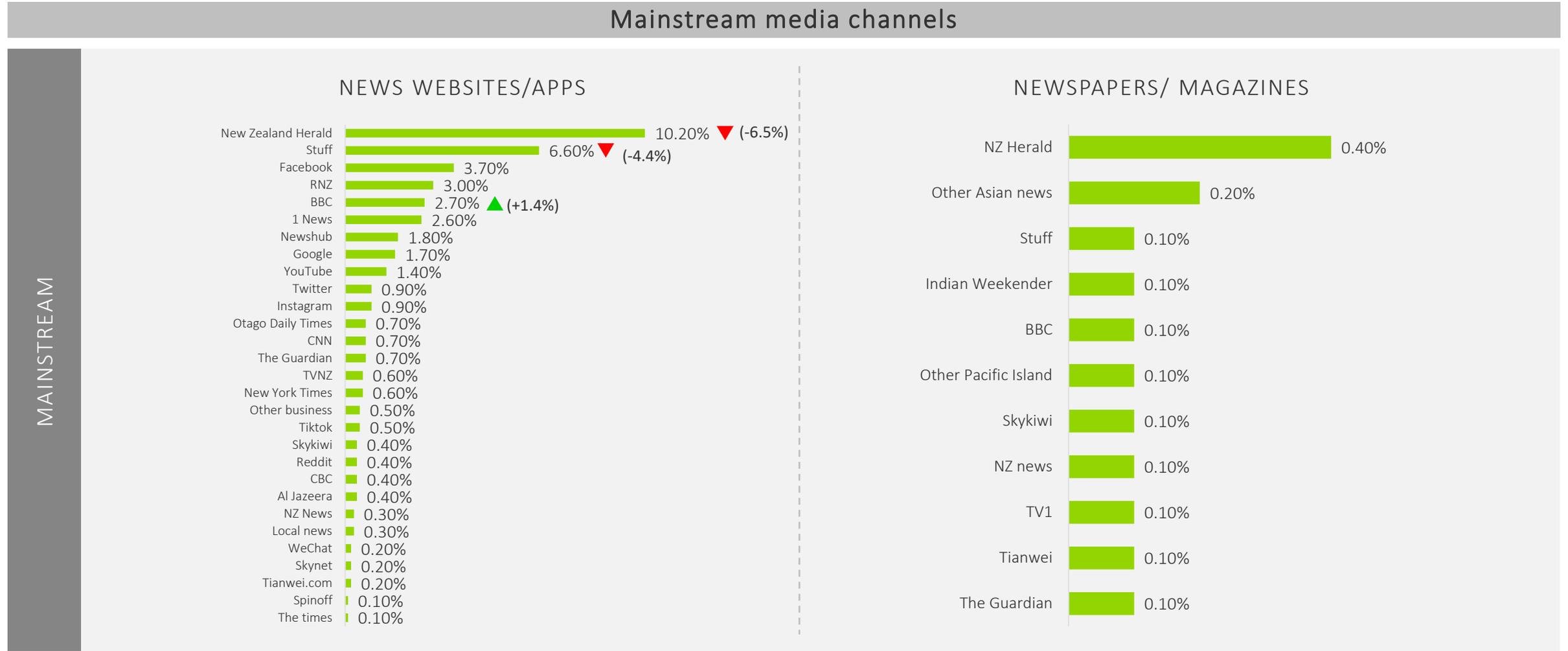
Overall mainstream media – 59% ▼ (-7)

Overall media for own ethnic community – 38%

Respondents who indicated they listened to, watched, or read each of the media sources in the previous question for their own ethnic community (at least three hours per week), were then asked which specific channels, websites, apps, newspapers and magazines they use the most. The graph below shows the respondent defined sources used. Results are based on all migrant workers in 2023.



Likewise, mainstream media channels consumed in 2023 are shown below.



MAINSTREAM

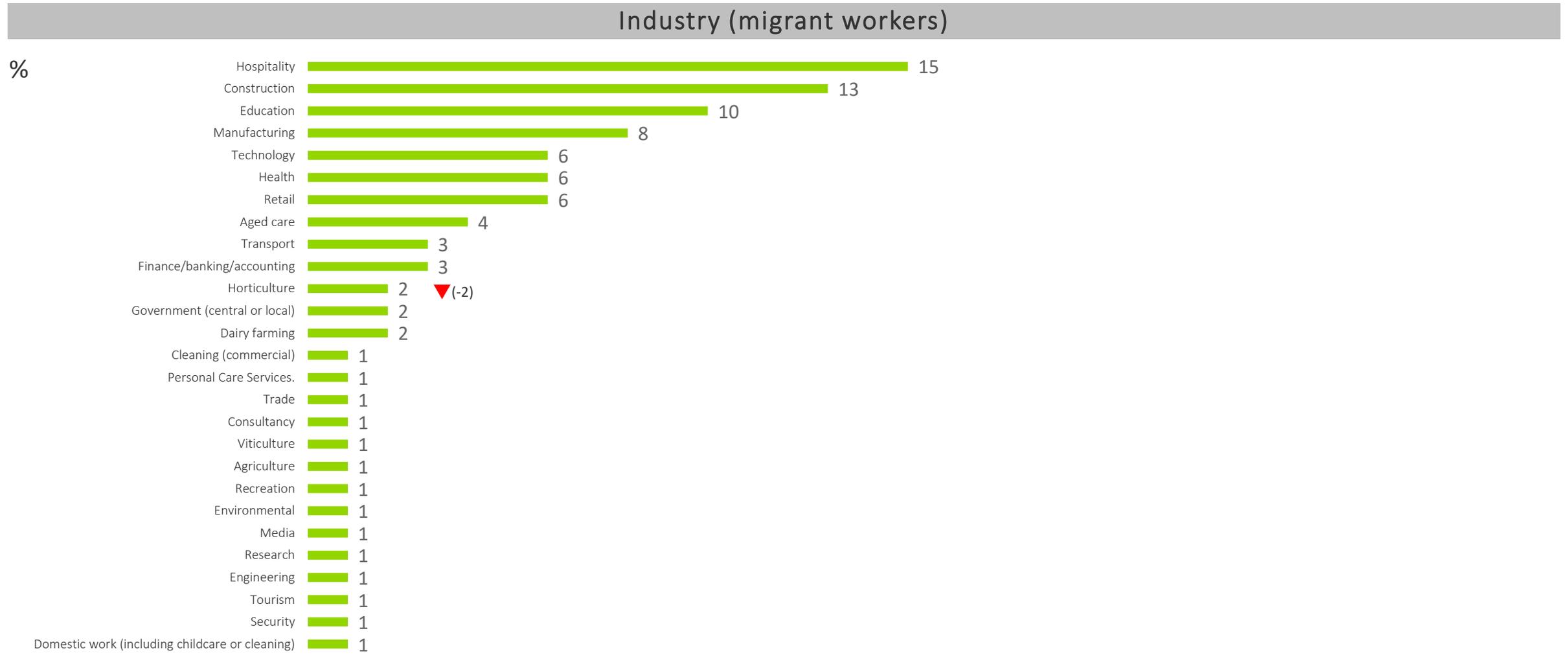
Appendix - workers

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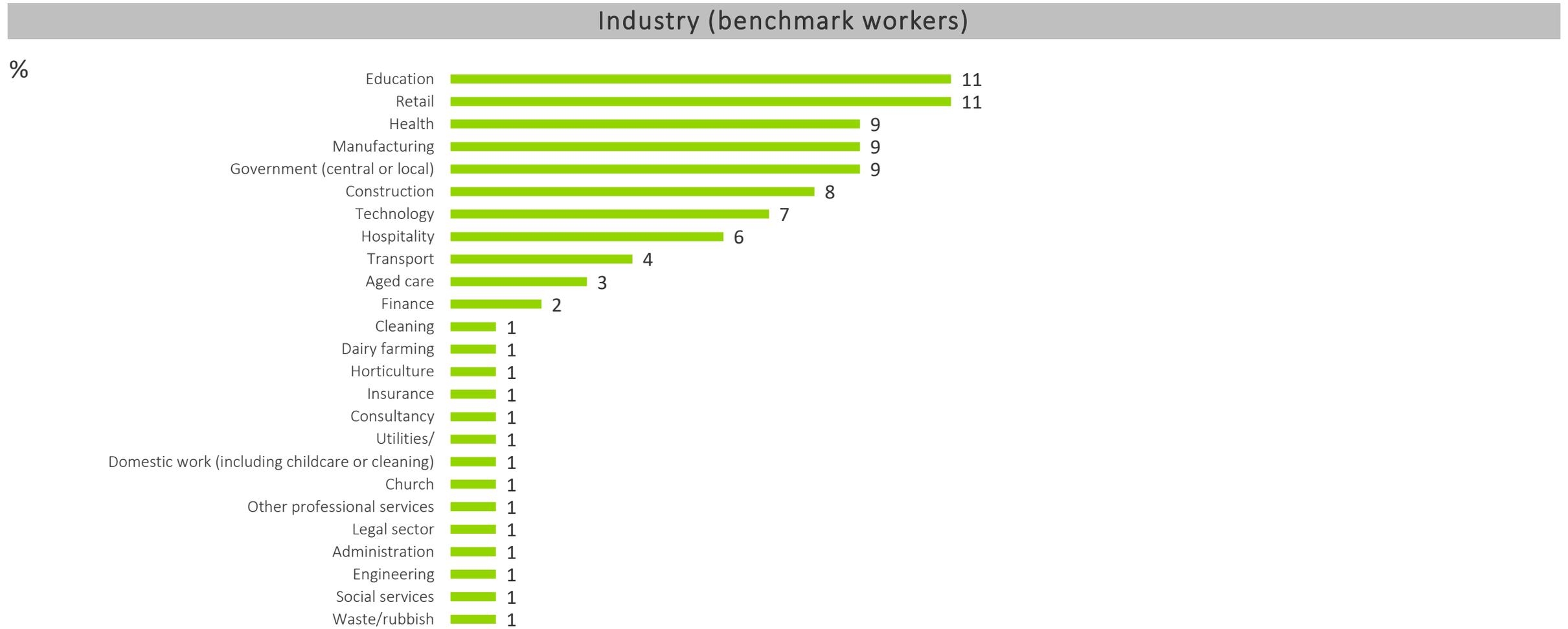


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Migrant workers who completed the survey are most likely to be working in hospitality or construction. This is consistent with the 2021 survey.

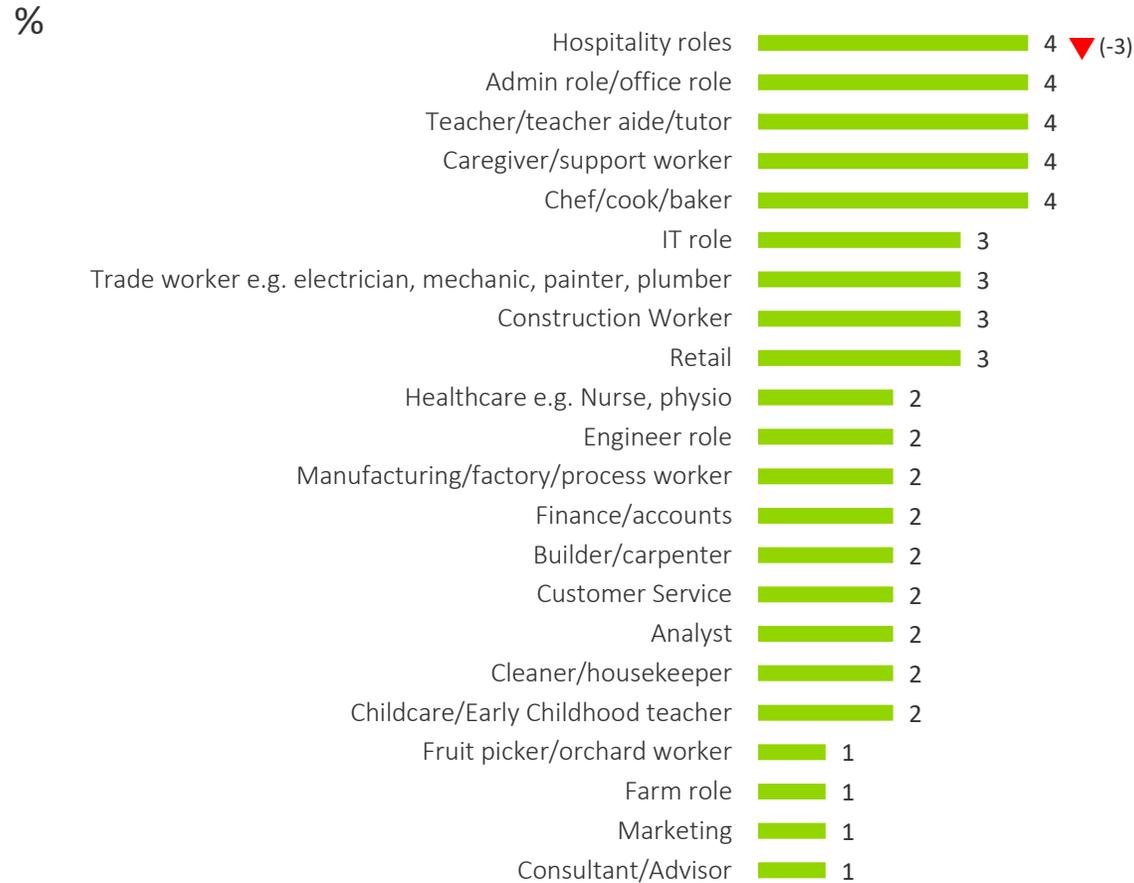


Similar to 2021, benchmark workers are more likely than migrant workers, to be working in retail.



And migrant workers work in a range of occupations.

Top occupations (migrant workers)



Employer results



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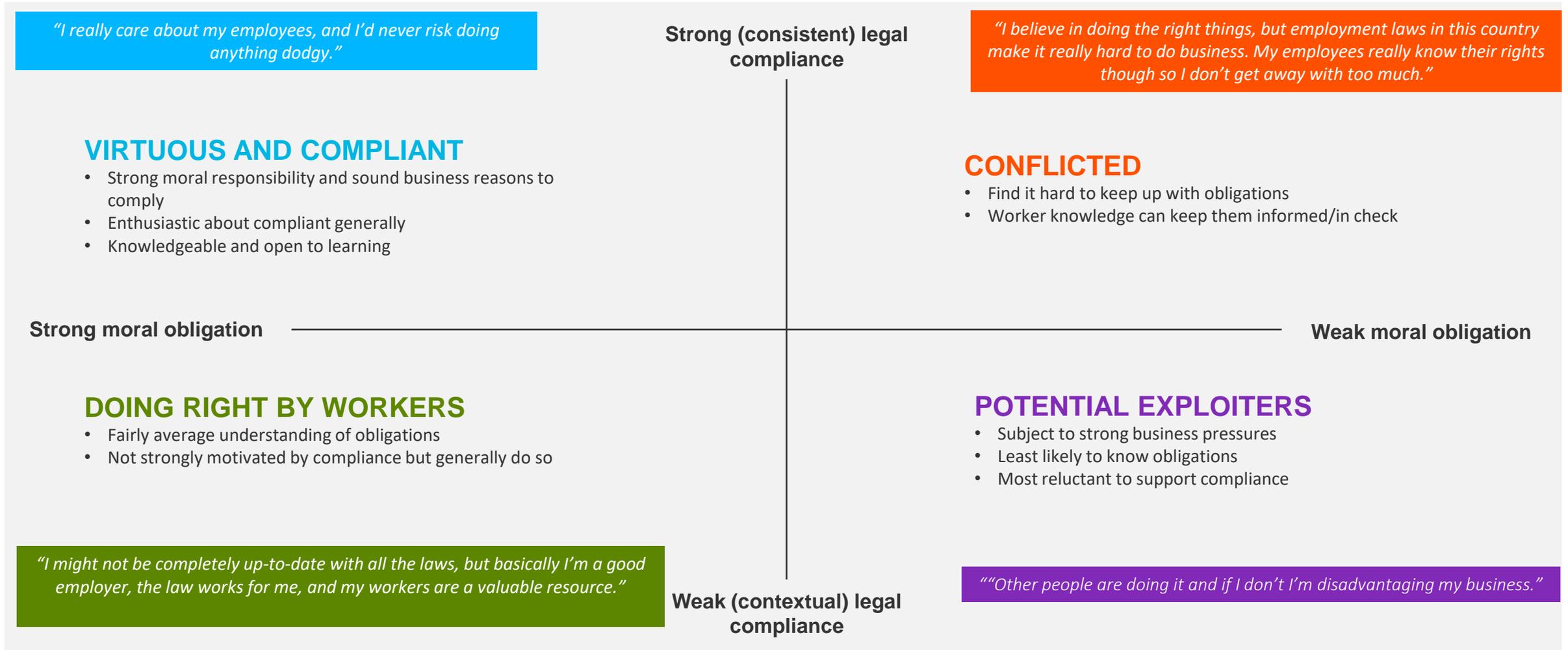
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What do we observe with the employer segments in 2023?

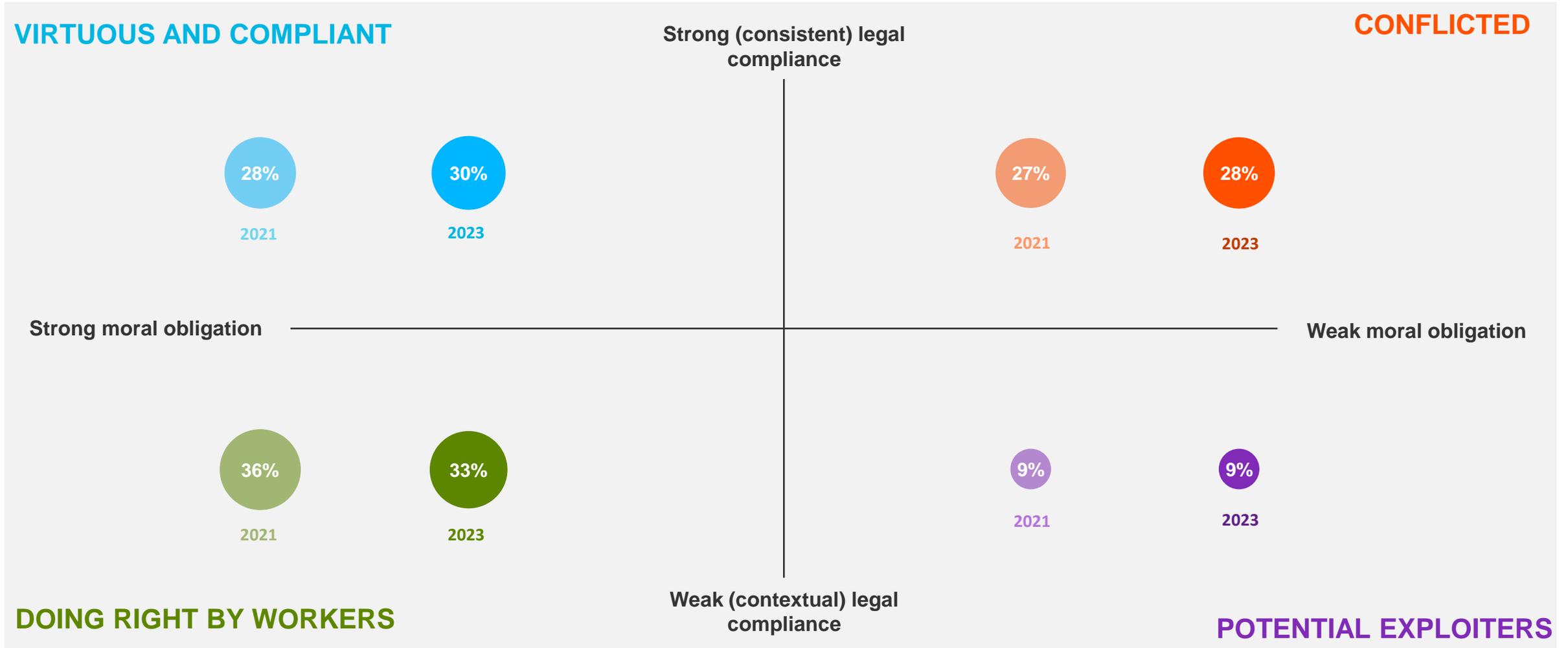
There has been no change since 2021 in the size or profile of the segments describing those who employ migrants.

This year, we segmented benchmark employers too. Segment sizes are markedly different to those of employers of migrant workers. Primarily because benchmark employers are much smaller than employers of migrants, they are more likely to exhibit weaker legal compliance creating risk of worker exploitation.

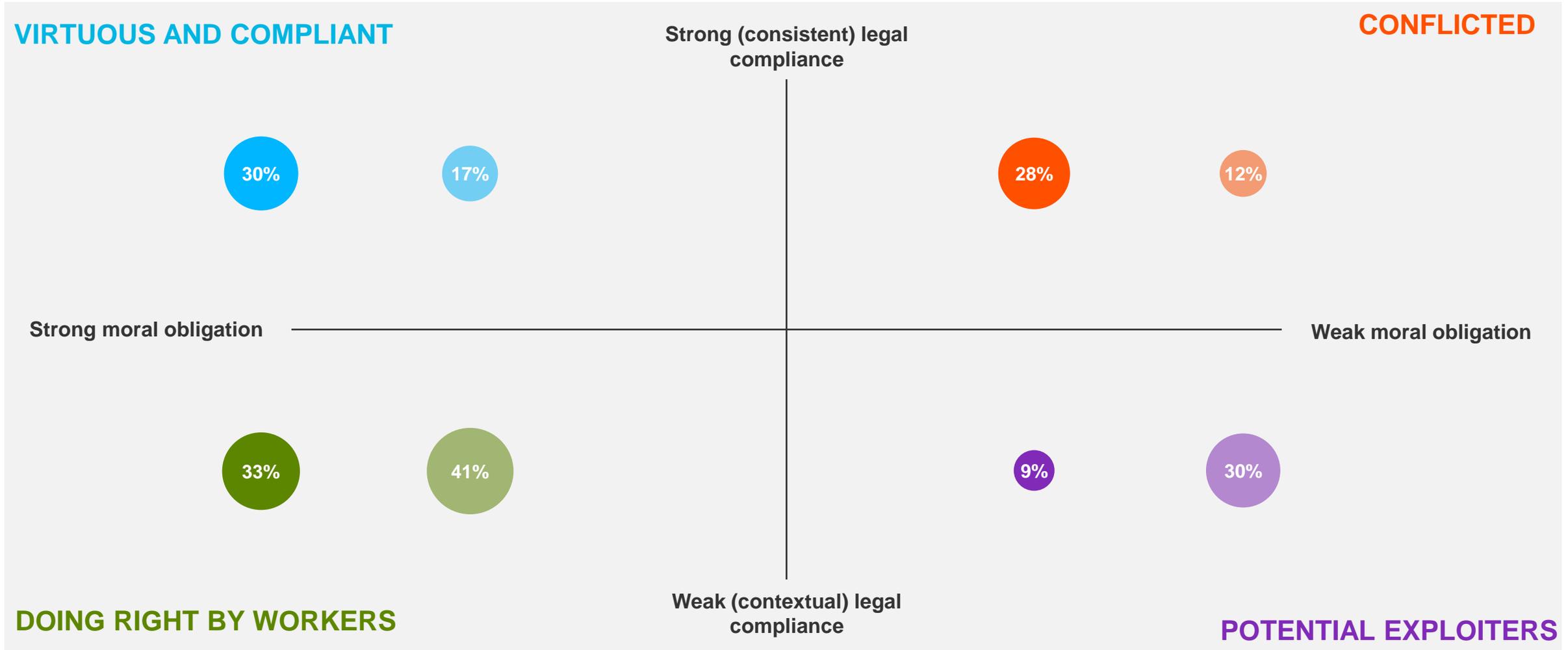
In 2021, we identified four groups of employers who sat along two spectrums; one of strong to weak compliance and another of strong to weak moral obligation. The *Conflicted* and *Potential Exploiters* groups are the most at risk of exploiting workers.



There has been no significant change in the size or profiles of the four groups of employers of migrants.



Benchmark employers are much more likely than employers of migrants to fall into the *Potential Exploiters* segment (please see explanation in next section).



Why do potential exploiters make up a larger proportion of benchmark employers than employers of migrants?

There are several reasons for this.

Most benchmark employers are small businesses. They find it hard to keep up with employment laws.

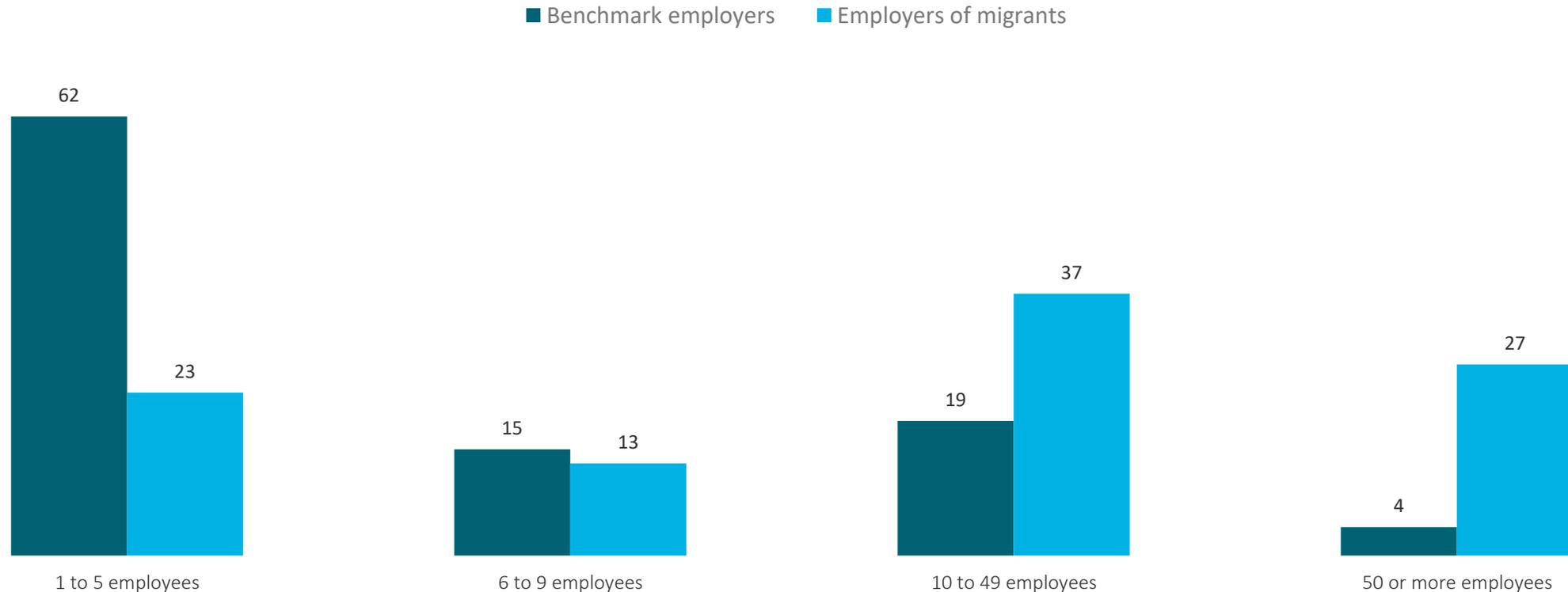
Without the same specialist HR functions and processes in place, small businesses are more likely than large businesses to fall into the *Potential Exploiters* group.

Related to the above, benchmark employers know less about employment regulations than employers of migrants. Further, they are more likely to believe 'bad' employers won't get caught because of a lack of government resource.

Compared to employers of migrants, benchmark employers are much more likely to be small businesses. We know from both the 2021 and current research that *Potential Exploiters* are more likely to be small businesses.

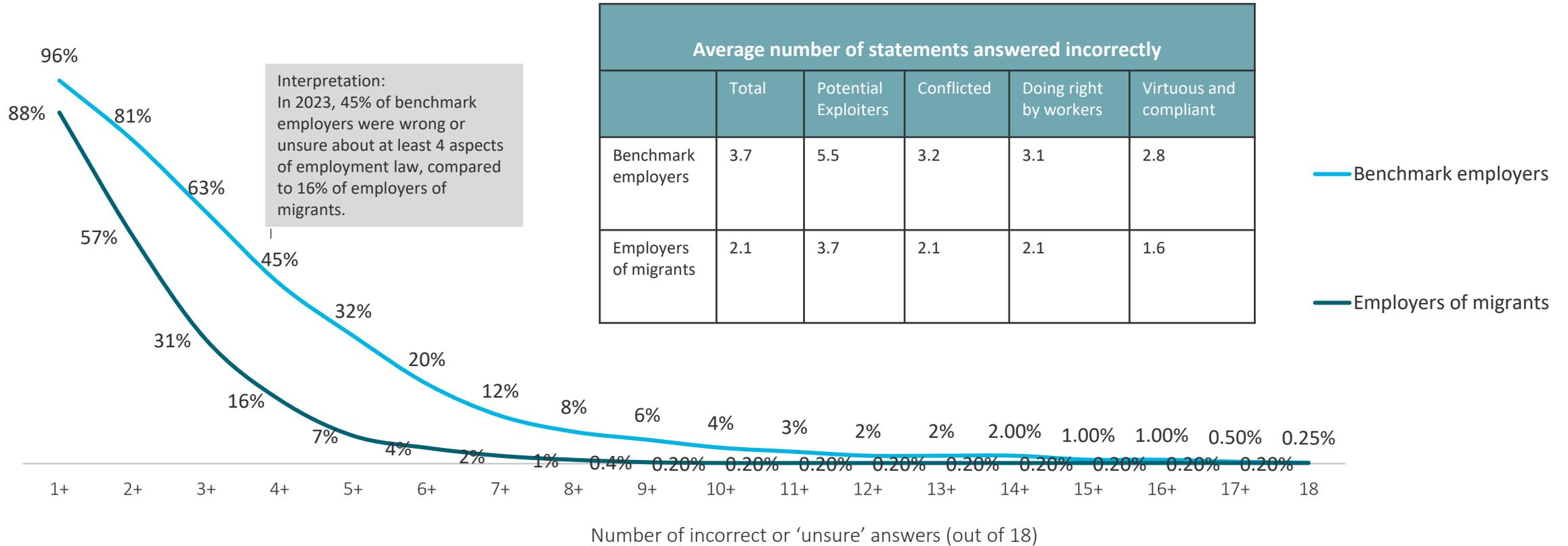
Comparison of business size profile between employers of migrants and benchmark employers

%



Incorrect knowledge of employment obligations is a key indicator of being susceptible to exploitation of workers, and is highest among benchmark employers.

Comparison of incorrect knowledge between employers of migrants and benchmark employers



Comparison of attitudes between employers of migrants and benchmark employers*

% who *strongly agree* with each statement
(% shown next to statement are those who agree overall)

Employers who mistreat their workers don't get caught because there are not enough government officials looking for bad employers **48%**
62%

*Wording for some of the statements differed slightly between the employers of migrants and benchmark employers surveys. Wording differences are noted in square brackets [...]



— Employers of migrants
— Benchmark employers

What changes do we observe in what employers know about their employment obligations?

Both self-rated and test knowledge of employment law among employers of migrants has improved since 2021.

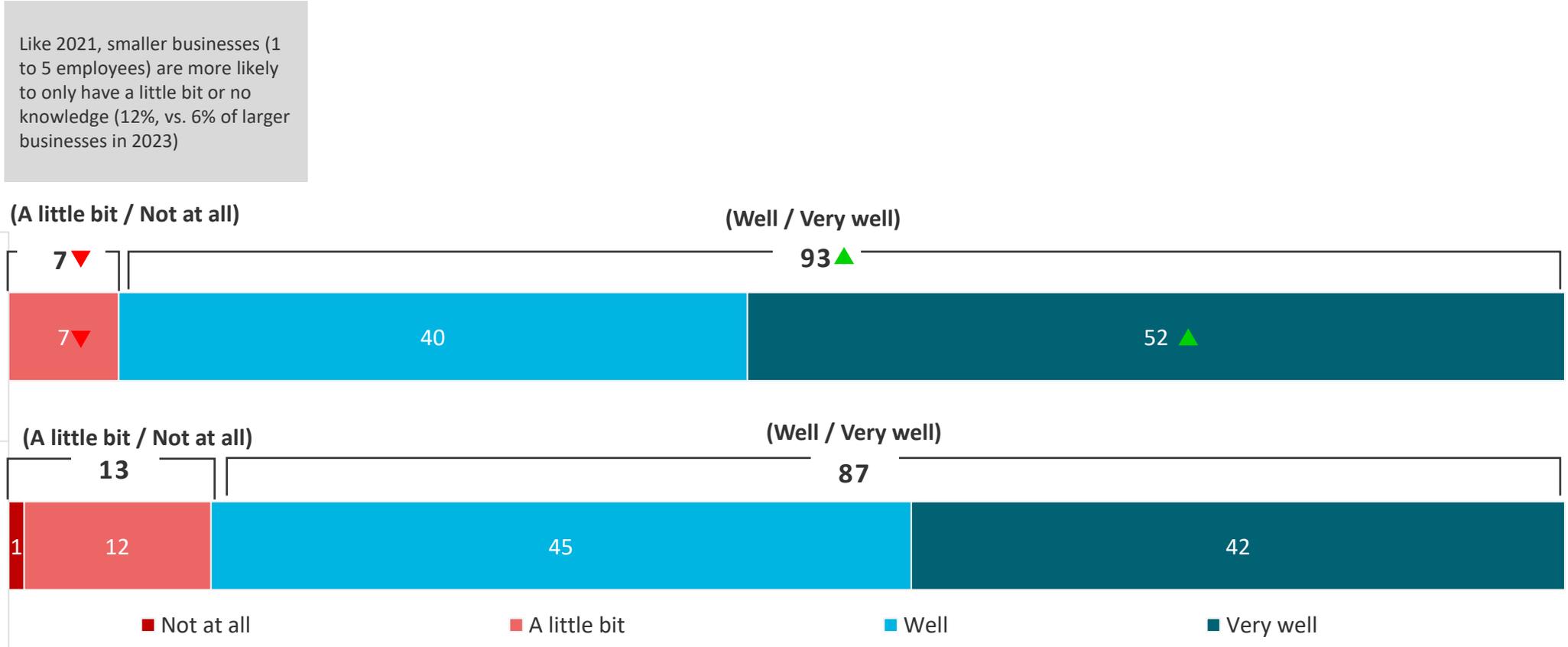
More employers are now aware of the MEWV, especially larger employers. However, three quarters of employers of migrants remain unaware.

Awareness of the accredited employer work visa is high, and most employers of migrants have either applied or plan to apply for the visa.

Employers of migrants are much more confident about their knowledge of employment rules and regulations than in 2021. The proportion of employers of migrants who feel they only know ‘a little bit’ or ‘nothing at all’ has approximately halved since 2021, and more rate themselves highly. Small employers are still more likely to rate their knowledge poorly.

Self-rating of understanding of employment rules and regulations (employers of migrants)

%

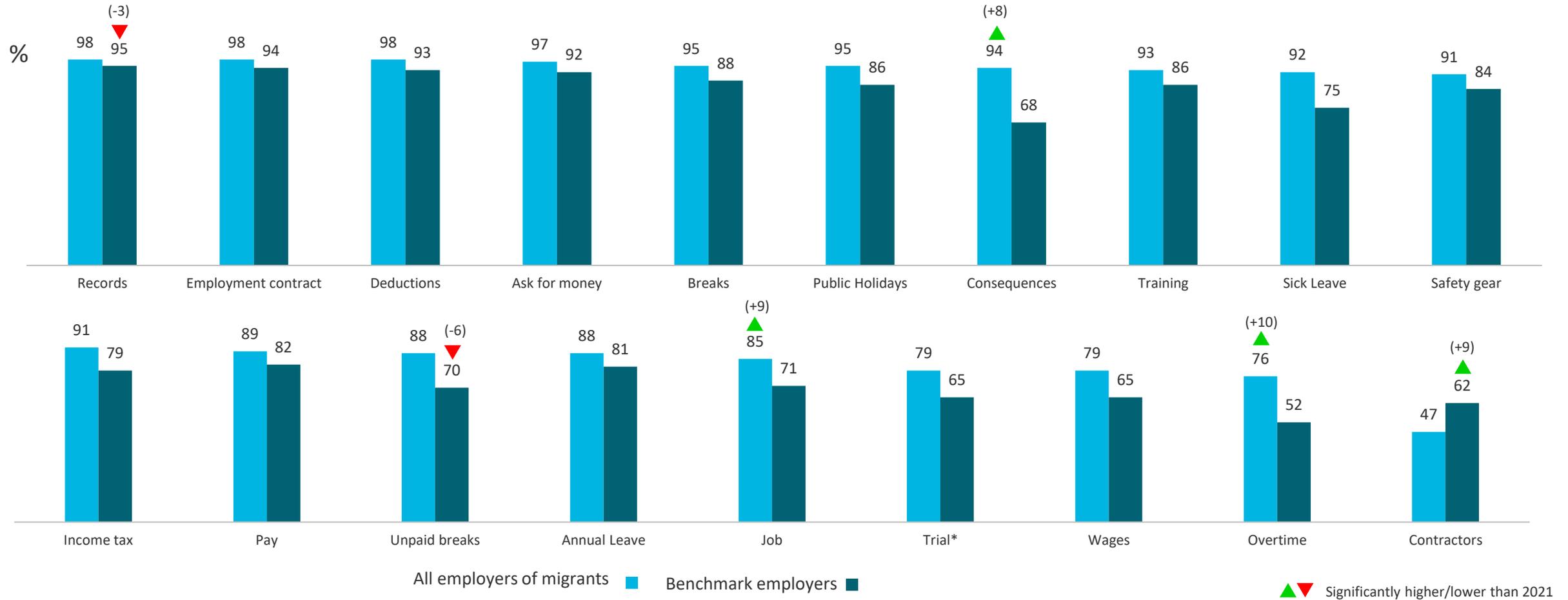


We showed employers a range of employment obligations, and they indicated which they thought were correct and which were incorrect. We also asked employers of migrants to tell us the adult minimum wage.

Employment right / regulation	Right Answer
Annual leave: Employees have the right to at least 20 days annual leave after one year into the job	Correct
Public holidays: If an employee works on a public holiday and it would normally have been one of their working days	Correct
Employment contract: Employers must provide the employee with a copy of the employment contract (agreement) before they start their job	Correct
Consequences: Employers caught exploiting or mistreating migrant workers can be banned from hiring migrants in the future	Correct
Training: Employers need to pay employees when they are being trained for the job	Correct
Contractors: Contractors don't have the same rights as employees	Correct
Sick Leave: After working for six months for an employer, an employee has the right to 10 days sick leave per year	Correct
Records: Employers must keep records of employee wages, hours of work, leave (sick, annual, etc) and deductions	Correct
Unpaid breaks: All breaks are unpaid (i.e. morning tea, lunch, afternoon tea)	Incorrect
Trial: A 90-day trial period can be added to the employment contract after the employee starts working (ONLY SHOWN TO EMPLOYERS WITH LESS THAN 20 EMPLOYEES)	Incorrect
Ask for money: An employer can ask for money from a potential worker to give the worker a job	Incorrect
Safety gear: Employees must pay for their own health and safety equipment	Incorrect
Wages: An employer can ask a worker to half a day without pay if they are asked to show their skills before they are employed	Incorrect
Job: An employer can employ a migrant as a chef, but have them work as a waiter.	Incorrect
Deductions: An employer can make deductions from an employee's wages or salary for any reason they want to without their consent.	Incorrect
Income tax: An employer can ask a worker to pay for their own income tax to the Inland Revenue	Incorrect
Breaks: People who work in stores, cafes and restaurants are NOT allowed to have rest breaks if they are too busy	Incorrect
Overtime: An employer does NOT need to pay a salaried worker overtime if they work a lot of extra hours	Incorrect
Pay: It is OK for employers to pay New Zealanders more than a migrant who is doing the same job because the New Zealander is a citizen of New Zealand	Incorrect

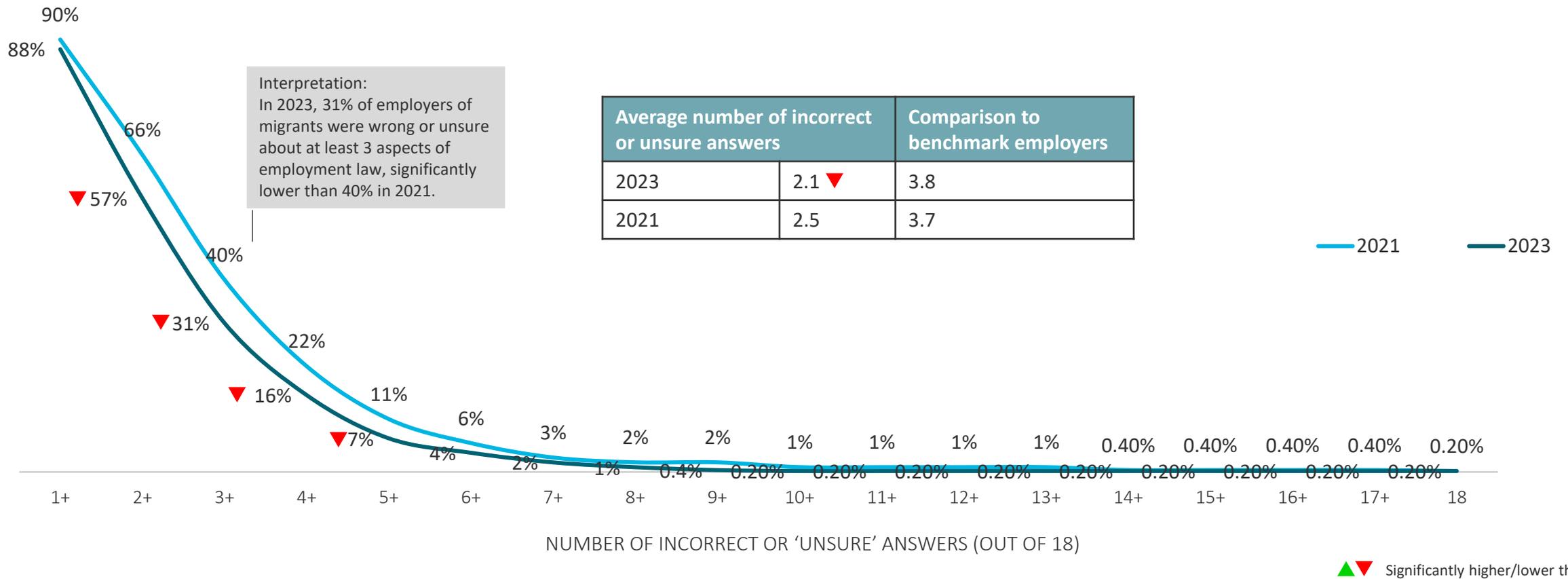
Benchmark employers' understanding of employment law is fairly consistent with 2021, although fewer know the law around unpaid breaks. Positively, knowledge of contractors rules has improved (this is the only area where their knowledge is greater than that of employers of migrants). Encouragingly, employers of migrants' knowledge about the consequences for mistreating workers and what you can ask workers to do (i.e. only the job you hired them for) has improved.

Level of correct understanding of employment law



Most employers of migrants have an incorrect understanding of at least one aspect of employment law. However, misunderstanding of multiple employment areas (two or more) has declined significantly since 2021.

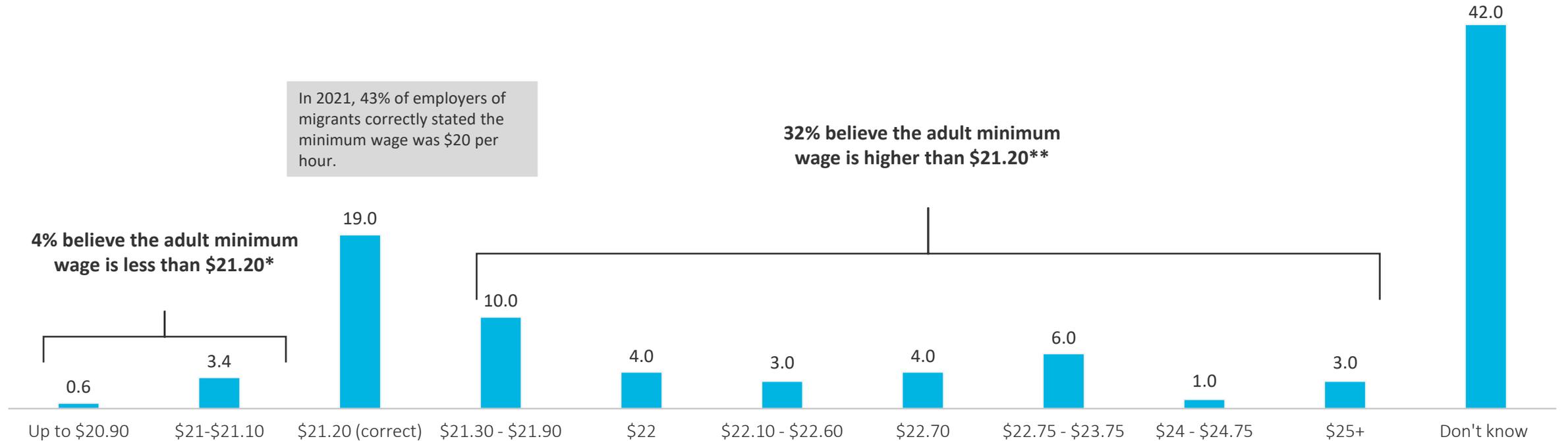
Incorrect knowledge or unsurety about employment laws (cumulative data) – employers of migrants



One in five (19%) employers of migrants know the adult minimum wage, less than half of the 2021 awareness level (43%). This may partly be due to survey timing – in 2021 fieldwork was completed at the end of the year before the new minimum wage was announced; 2023 fieldwork completed at the end of March, after the announcement of the new minimum wage and just before it came into effect. If we include those employers who stated \$22.70 the proportion who are ‘correct’ is 24%.

Awareness of adult minimum wage (employers of migrants)

%



*An additional 9 respondents answered '1' or '2'. They have been excluded from the chart as it is likely they had accidentally omitted a '0'

** One respondent typed in 2,365. They have been excluded from the chart.

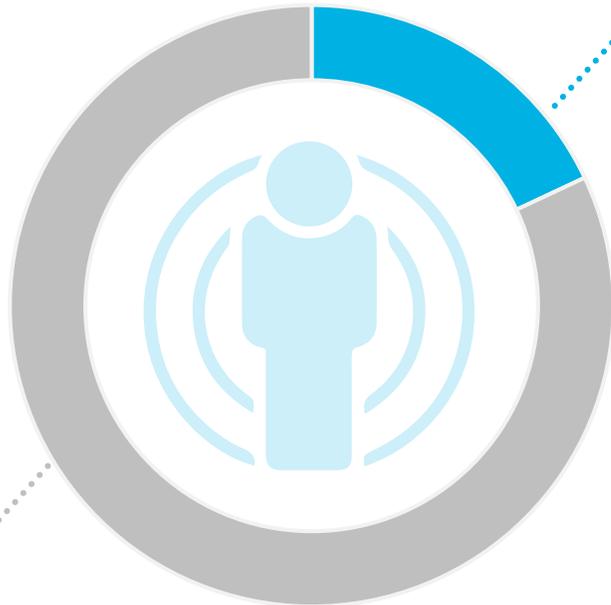
Awareness of the migrant exploitation work visa has grown since 2021; one in four employers of migrants are now aware of the visa.

Awareness of migrant exploitation work visa (employers of migrants)

2021

18%
Aware

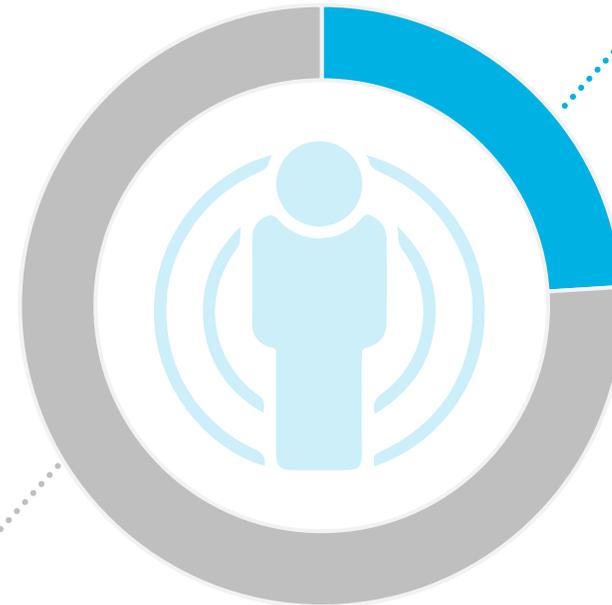
82%
Not aware



2023

24%
Aware

76%
Not aware



Increases are seen across many groups but in particular among:

- Men (28%, vs. 20% in 2021)
- Auckland based employers (28%, vs 17% in 2021)

Awareness of the visa is higher amongst employers with more than 10 migrant workers (36%, vs. 21% of employers with 10 or fewer migrant workers)

▲ ▼ Significantly higher/lower than 2021

Three quarters of employers of migrants are aware of the accredited employer work visa and have either applied, or plan to apply, for accreditation. Larger employers (with 6+ migrant workers) are more likely to have applied.

Accreditation applications (employers of migrants)

%

- Groups who are more likely to have applied for accreditation:
- Those with workers on employer supported work visas (63%)
 - Employers with 6+ migrant workers (82%, vs. 59% of those with fewer than five)
 - Virtuous and compliant employers (69%)
 - Large employers with 50+ employees (77%, vs. 26% of small businesses with 1-5 employees)
 - Those with Filipino (75%), Other Asian* (66%) and Fijian (80%) workers

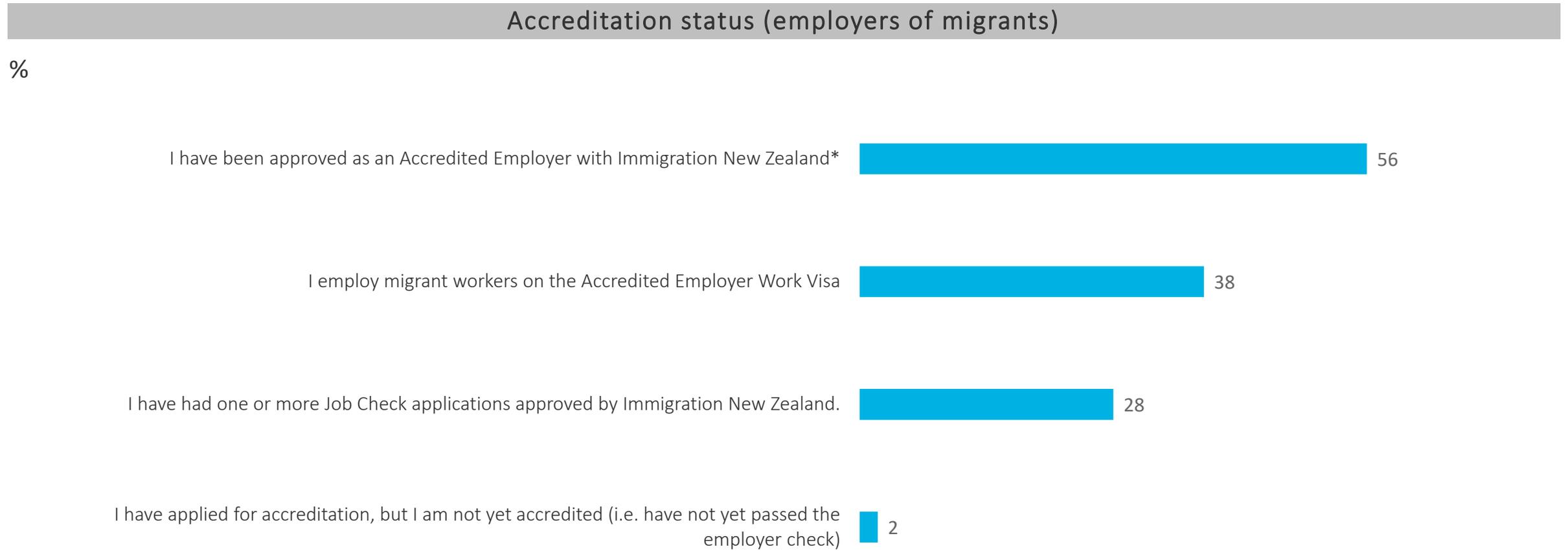
Employers who were born in New Zealand are more likely to say they have no plans to apply for accreditation (20%, vs. 12% of employers who were born overseas)



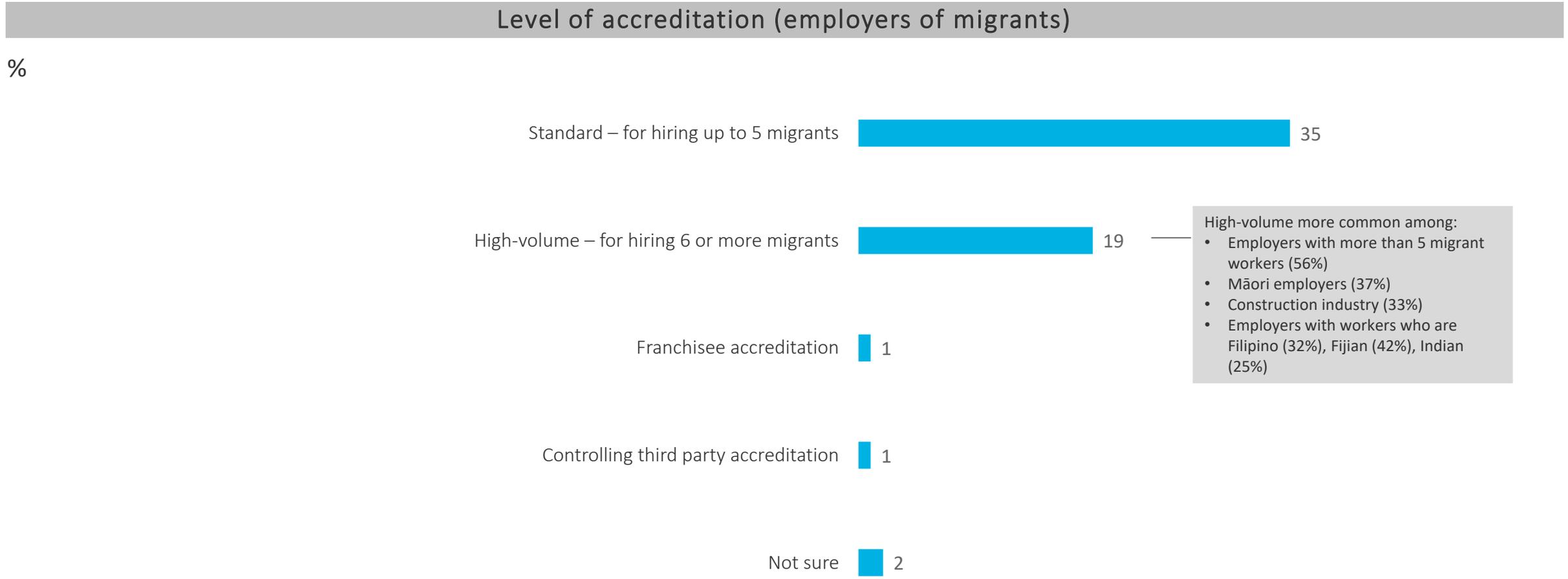
■ I have applied for accreditation
 ■ I have not applied for accreditation and do not have plans to do so
 ■ I have not applied for employer accreditation, but I have plans to do so
 ■ Have not heard of the visa
 ■ Prefer not to say

*Includes Asian nationalities excluding Chinese, Indian, Filipino

Four in ten employers of migrants currently have workers on the accredited employer work visa.



Just over a third of employers of migrants applied for the standard level of accreditation. Over half (56%) of employers with six or more migrant workers have applied for the high-volume accreditation level.



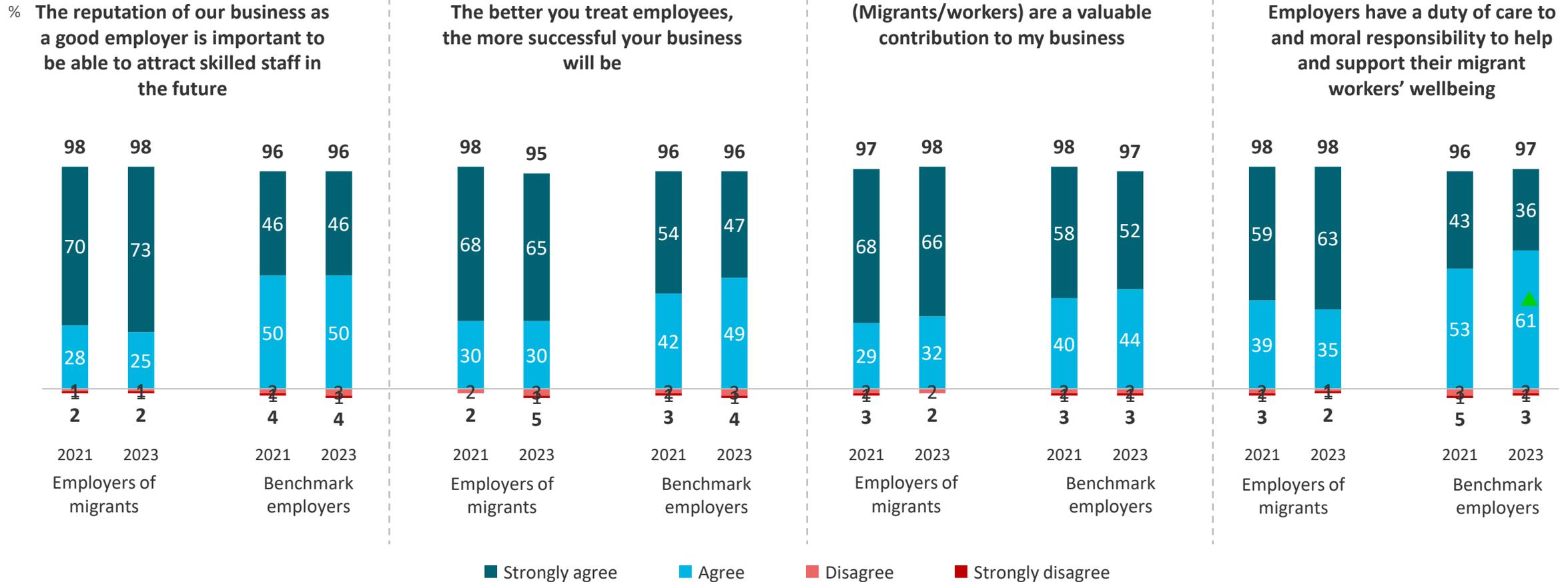
How have employers' attitudes shifted since 2021?

Keeping up with employment and immigration laws is less difficult for employers of migrants than it was in 2021. Further, more employers of migrants feel workers are now aware of employment law.

Labour market pressures are evident with a growing sense among benchmark employers that it is hard to find good staff and be profitable. Moreover, more employers of migrants now feel government rules are a barrier to business success.

Overall, employers continue to exhibit a strong moral obligation towards workers and recognise the contribution they make to business success.

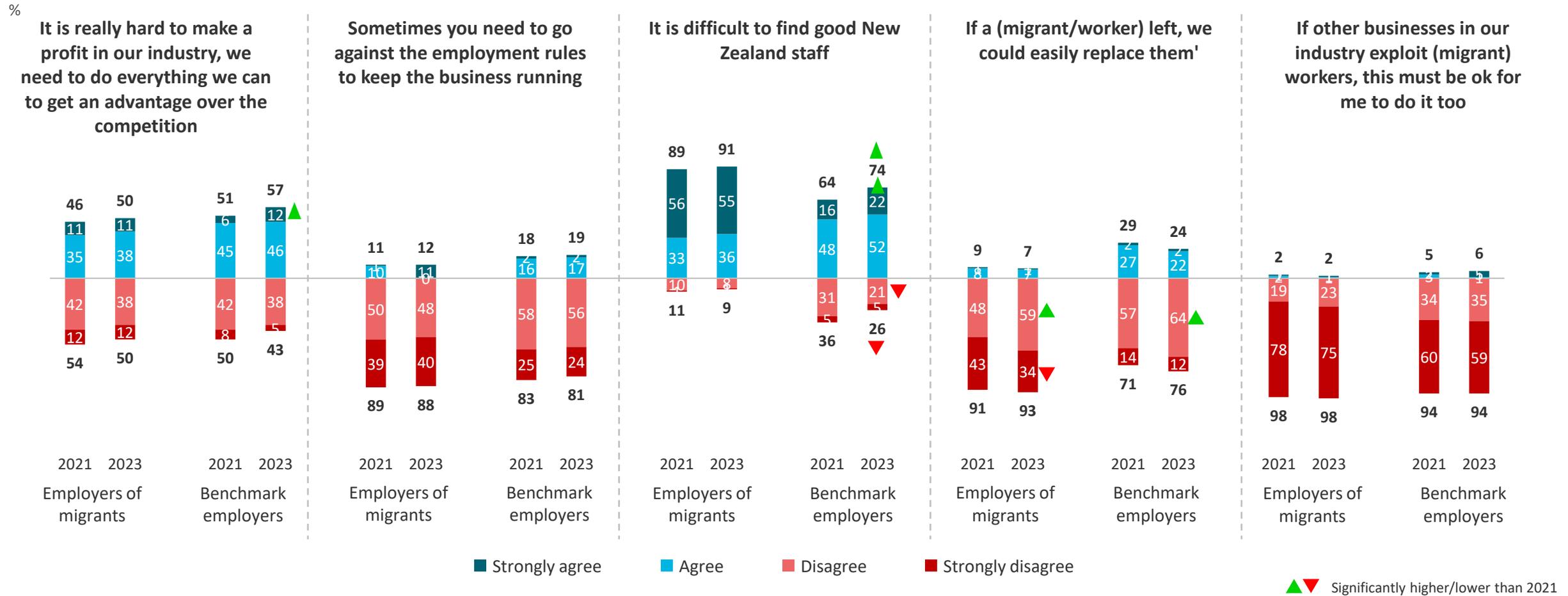
Attitudinal influences on exploitation



▲ ▼ Significantly higher/lower than 2021

Employers continue to face a number of business pressures and norms. Compared to 2021, more benchmark employers face labour constraints and feel it is difficult to make a profit – a reflection of the tighter labour market and high inflation.

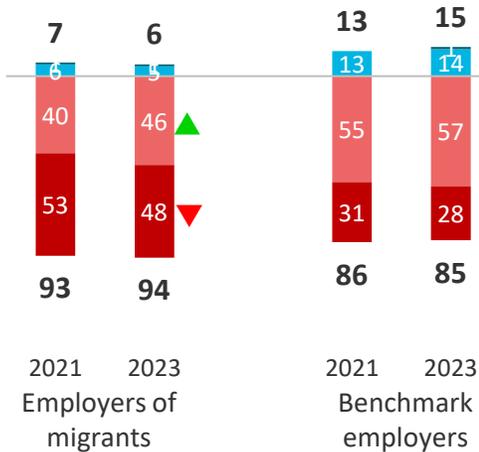
Attitudinal influences on exploitation



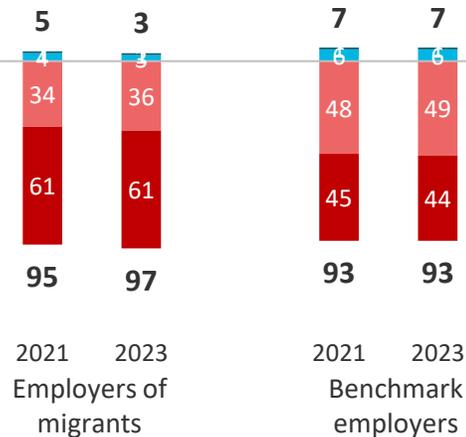
As in 2021, a minority of employers believe they treat migrant workers differently to Kiwi workers, and feel that workers owe the employer for giving them a job. Most employers believe worker fear enables 'bad' employers to get away with mistreating workers, although this belief has weakened among employers of migrants since 2021.

Attitudinal influences on exploitation

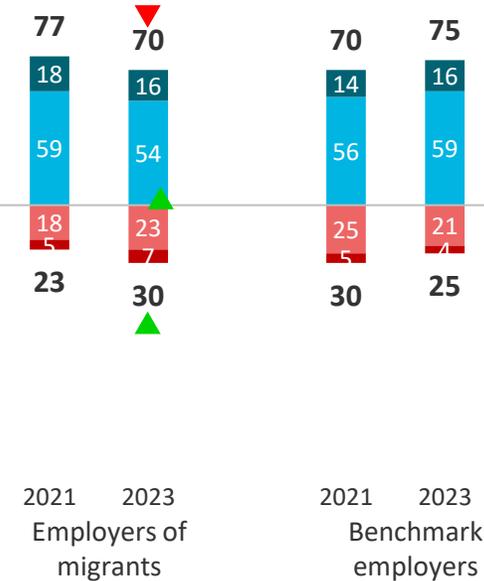
% (Migrants/workers) owe employers for giving them a job



I treat my migrant workers differently to my Kiwi workers



Employers who are mistreating their (migrant) workers don't get caught because (migrants/workers) are scared to report employers' actions to the authorities



Employers who are mistreating their (migrant) workers don't get caught because migrants are scared that they will lose their visa and be deported

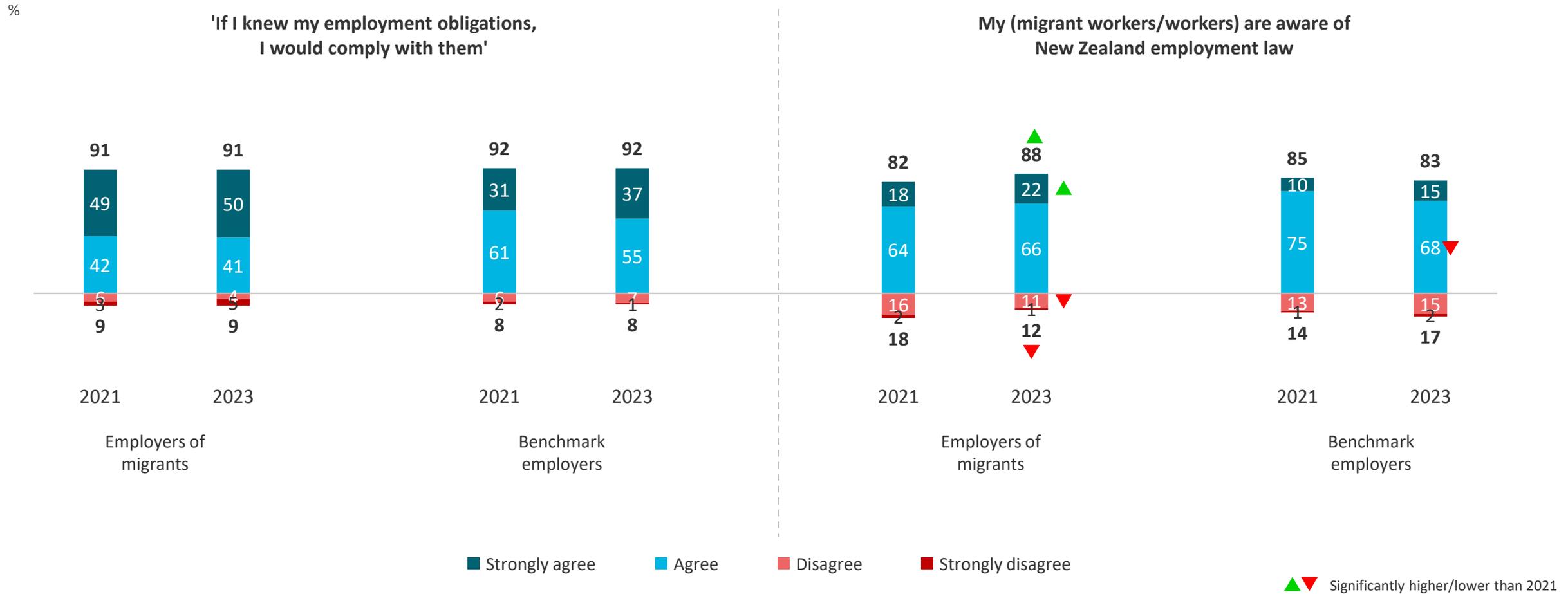


Strongly agree Agree Disagree Strongly disagree

▲ ▼ Significantly higher/lower than 2021

Consistent with 2021, most employers feel a sense of obligation to comply with employment law. More employers of migrants believe their migrant workers are aware of NZ employment law than in 2021.

Attitudinal influences on exploitation

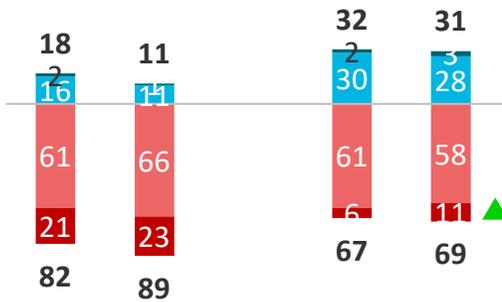


Compared to 2021, fewer employers of migrants find it difficult to keep up with employment and immigration laws. Benchmark employers are less likely than employers of migrants to strongly feel they know where to go for help (a reflection of benchmark employers' smaller business size).

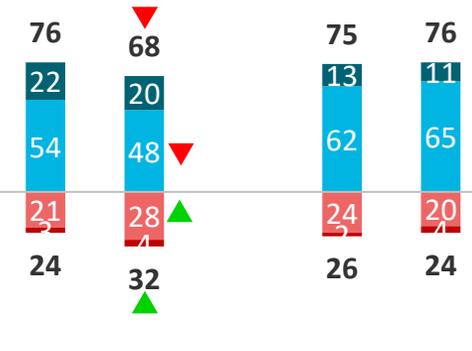
Attitudinal influences on exploitation

%

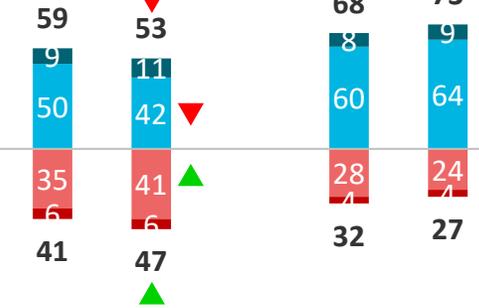
I find it difficult to understand my employer obligations in New Zealand



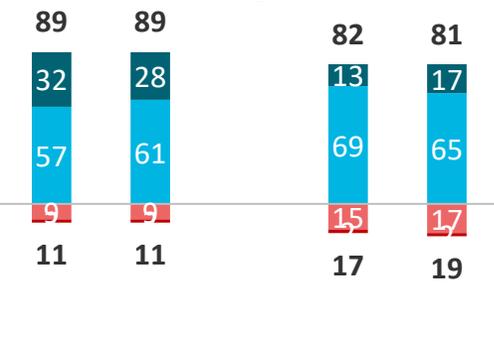
It is hard to keep up with immigration laws



It is hard to keep up with employment laws



I know where to go or who to ask for help, if I need support with understanding my employment obligations

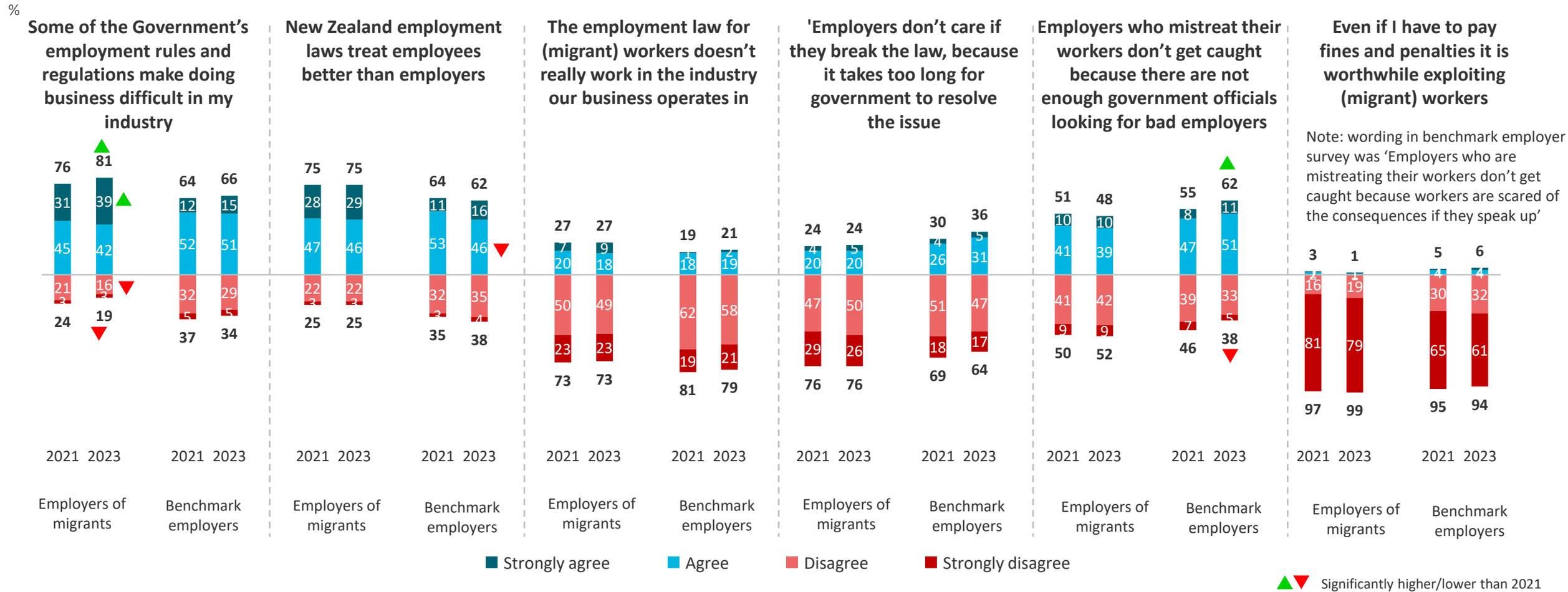


Strongly agree Agree Disagree Strongly disagree

▲ ▼ Significantly higher/lower than 2021

However, there is a greater sense in 2023 among employers of migrants that New Zealand's employment laws make doing business difficult. Further, benchmark employers feel more strongly that there is a lack of government resource to deal with worker mistreatment.

Attitudinal influences on exploitation



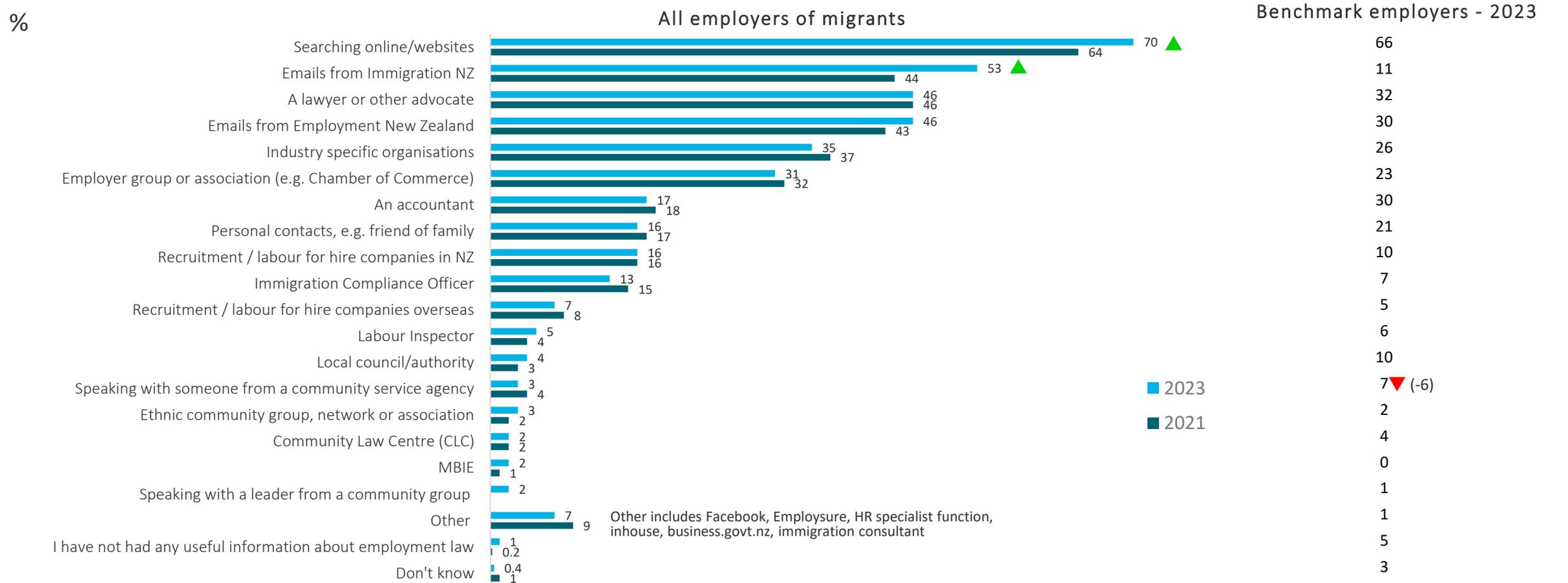
How do employers find out about their employment obligations?

Online sources continue to be the primary channel for information on employment rights – more employers of migrants identify online searches and Immigration NZ emails as useful sources than in 2021.

There is also a growing number of employers of migrants who have visited the Immigration NZ, Employment NZ, business.govt.nz, and Live and Work NZ websites.

Searching online and Immigration NZ emails remain the most common sources of information on employment rights, and both are more widely perceived to be useful sources than in 2021. Benchmark employers' useful sources are similar to 2021, although speaking with community service agencies has declined.

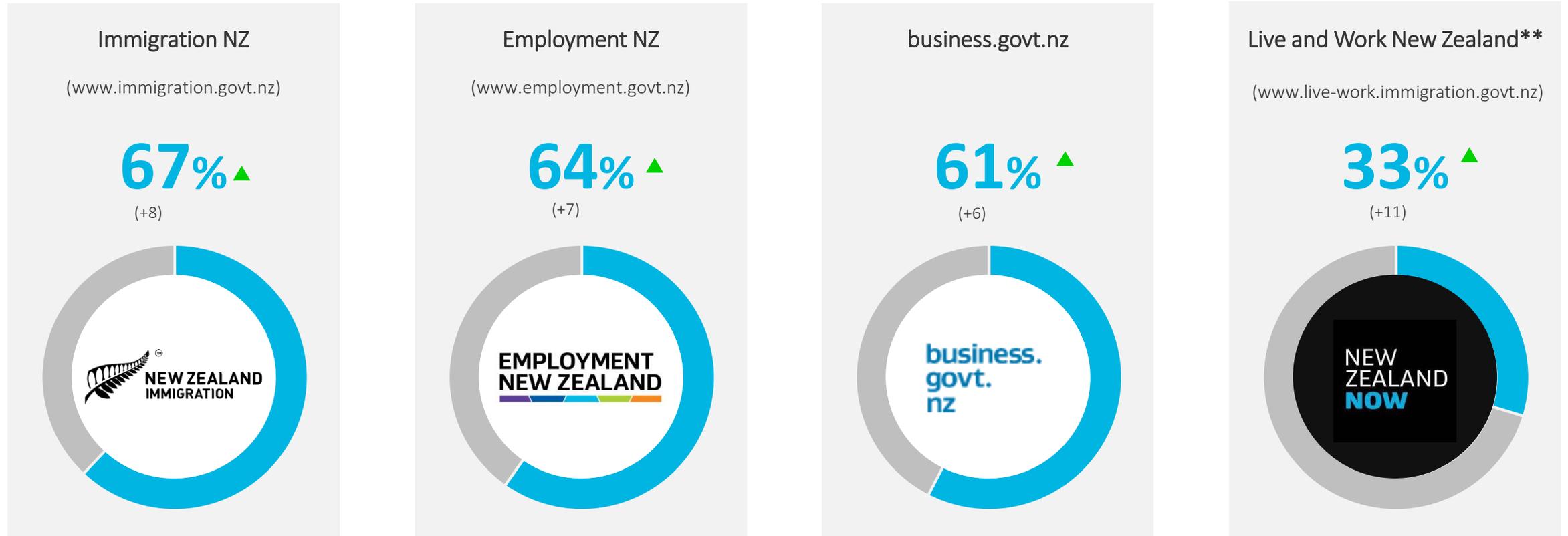
Useful sources of information about employment law



Use of all four websites has increased. Immigration NZ remains the most commonly visited of the four websites.

Website use (employers of migrants)

%

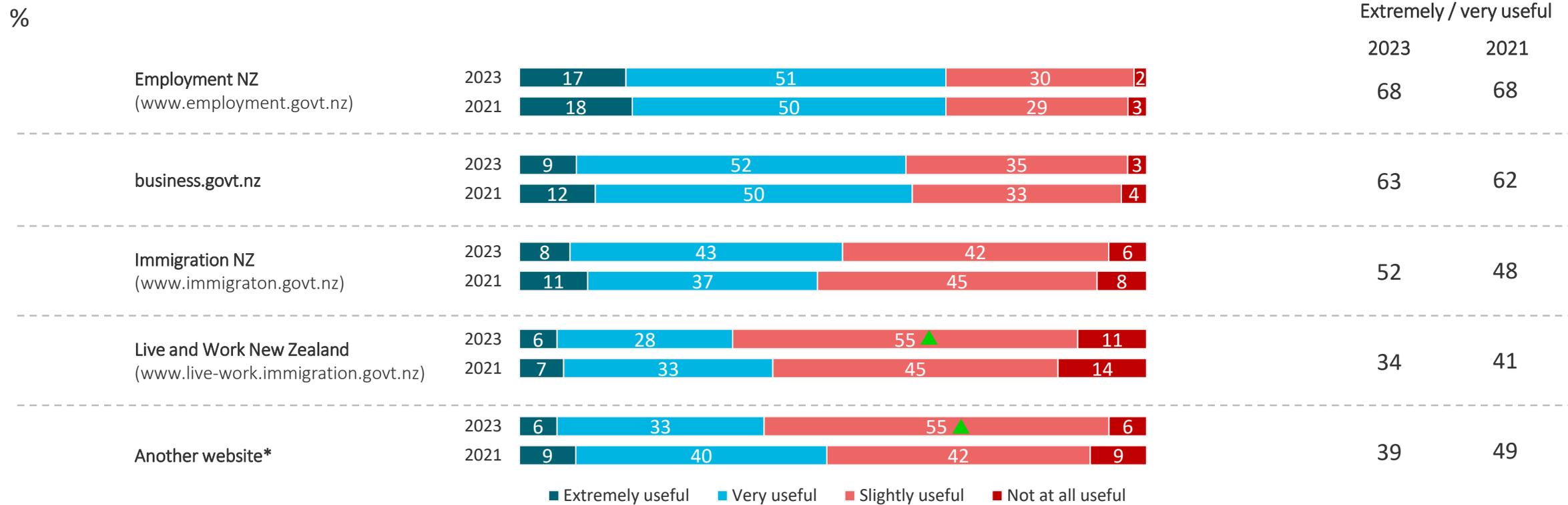


*These calculations assume that respondents who did not select 'searching online/websites' at Q4 did not visit any of these websites. As there may be some employers who did do this, the website use figures on this page may be slightly conservative.

**Formerly called New Zealand Now and this is what was referred to in the 2021 survey.

Perceptions of the usefulness of each website are similar to 2021, with the exception of the Live and Work NZ website where slightly weakened perceptions of usefulness are evident (although not significantly).

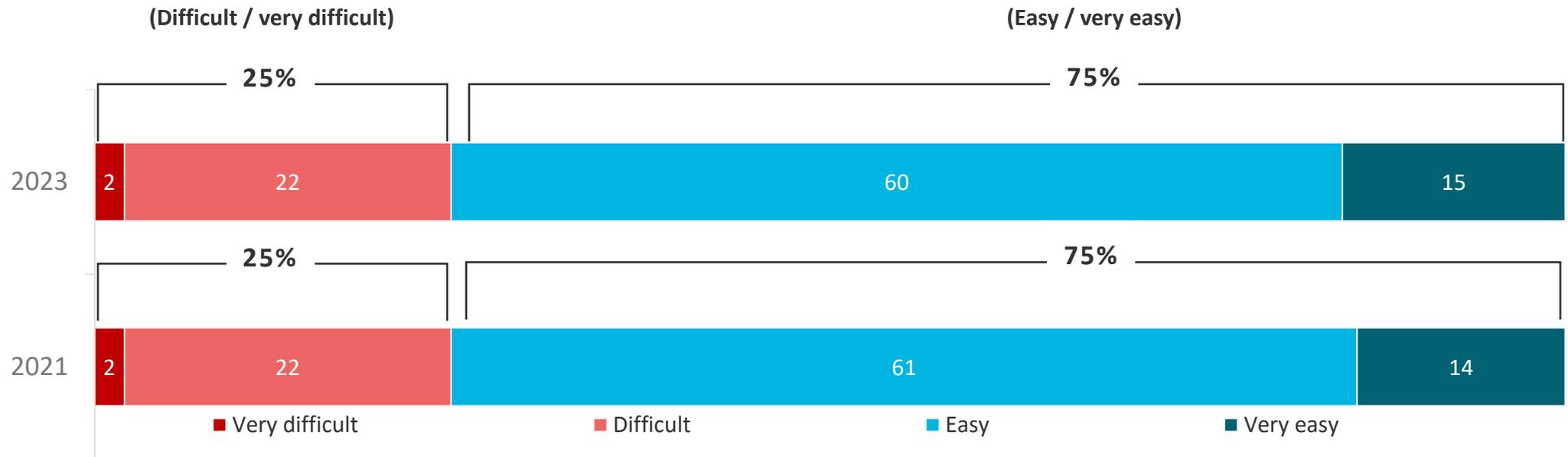
Usefulness of websites as sources of information about employment rules and regulations



Consistent with 2021, the majority of employers of migrants find it easy to find out information about their employment obligations online. One in four find it difficult.

Ease of finding out about employment obligations online (employers of migrants)

%



How would employers like to find out about their employment obligations?

Employers' learning and information preferences are consistent with what they were in 2021. A dedicated website and helpline top the list of preferences.

Regular updates on changes in employment and immigration law hold strong appeal.

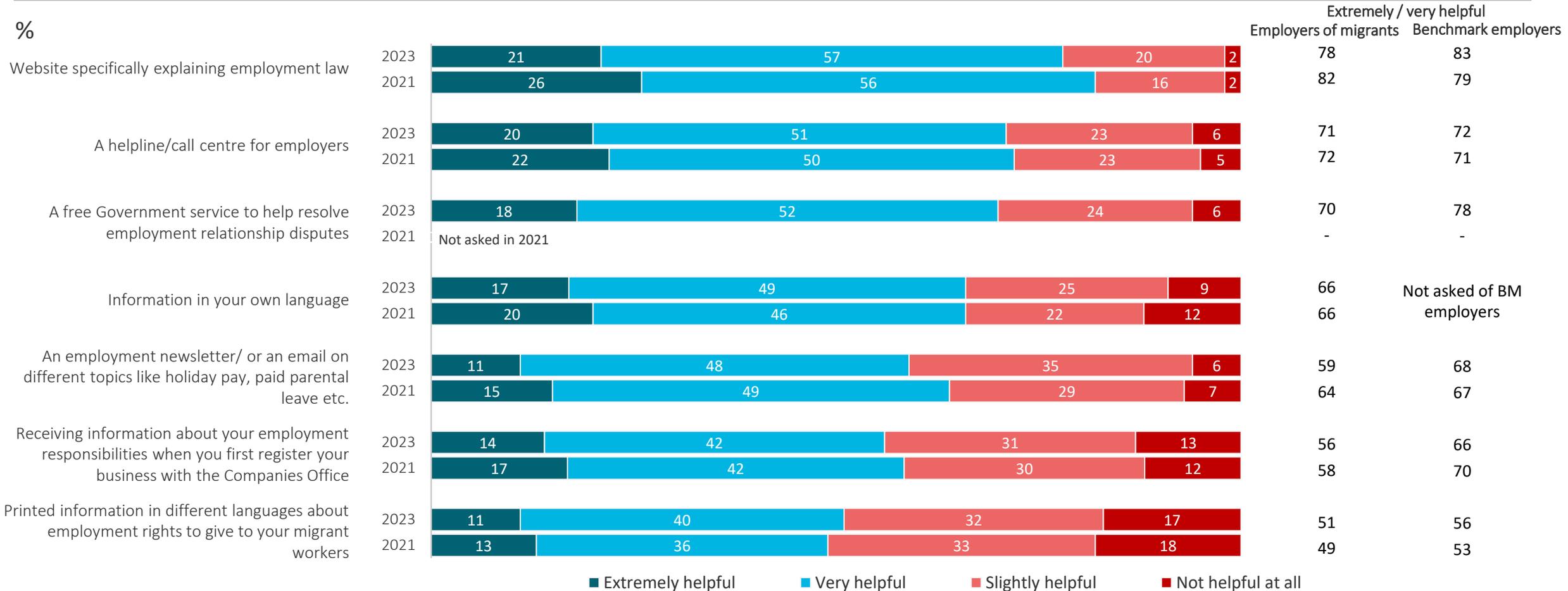
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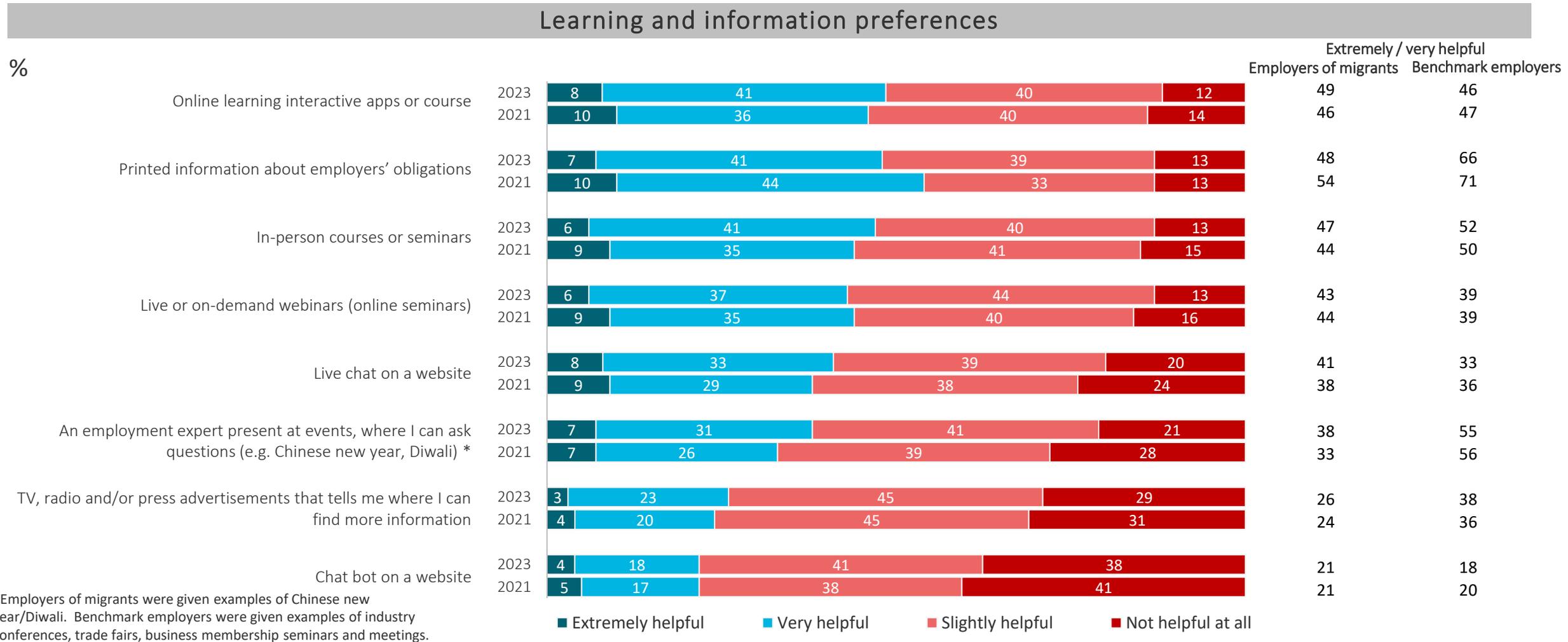
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There has been no material change in how helpful each learning / information tool is perceived to be. A dedicated website on employment law and helpline again top the list. Most employers would also welcome a free Government dispute resolution service.

Learning and information preferences (employers of migrants)



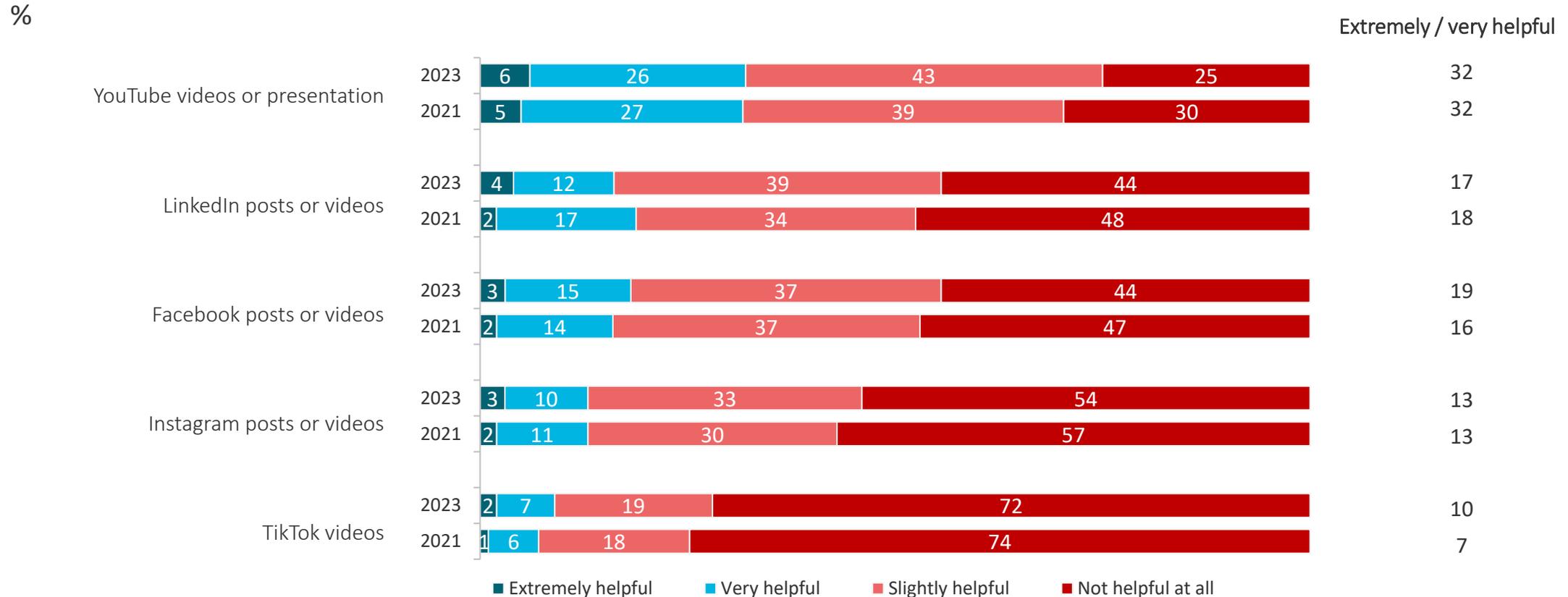
Similarly, chat bots and advertising are still perceived to be the least helpful ways to learn about employment obligations.



*Employers of migrants were given examples of Chinese new year/Diwali. Benchmark employers were given examples of industry conferences, trade fairs, business membership seminars and meetings.

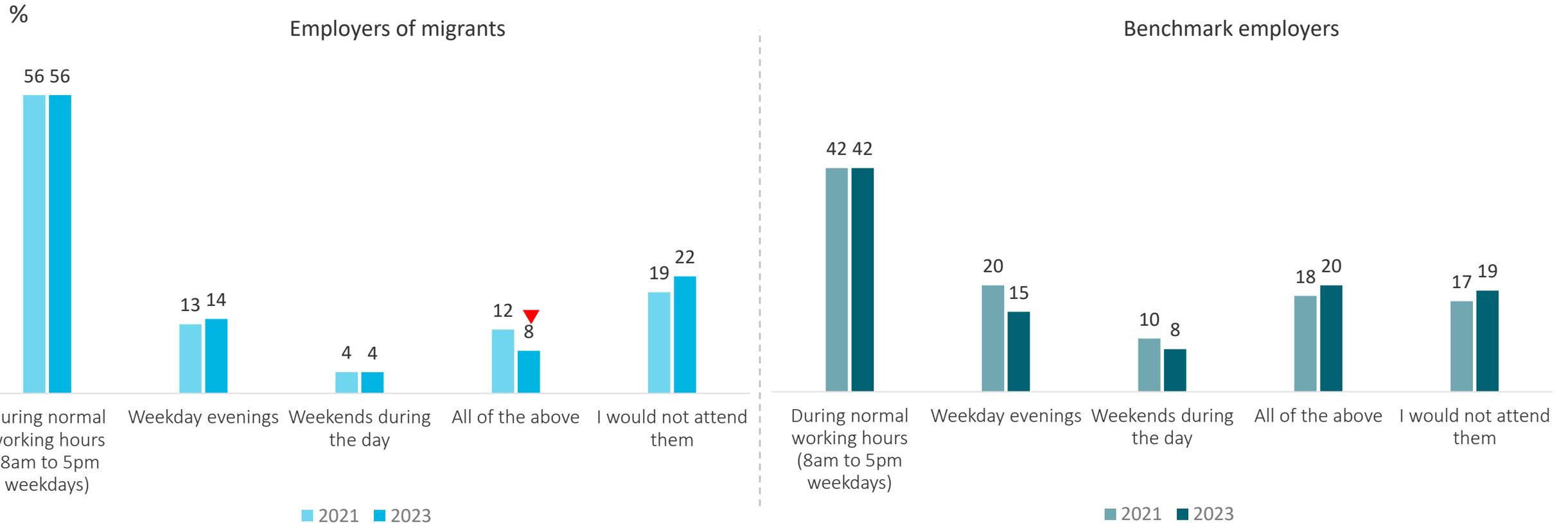
As in 2021, relatively few benchmark employers felt these suggestions would be helpful.

Additional learning and information preferences (benchmark employers)



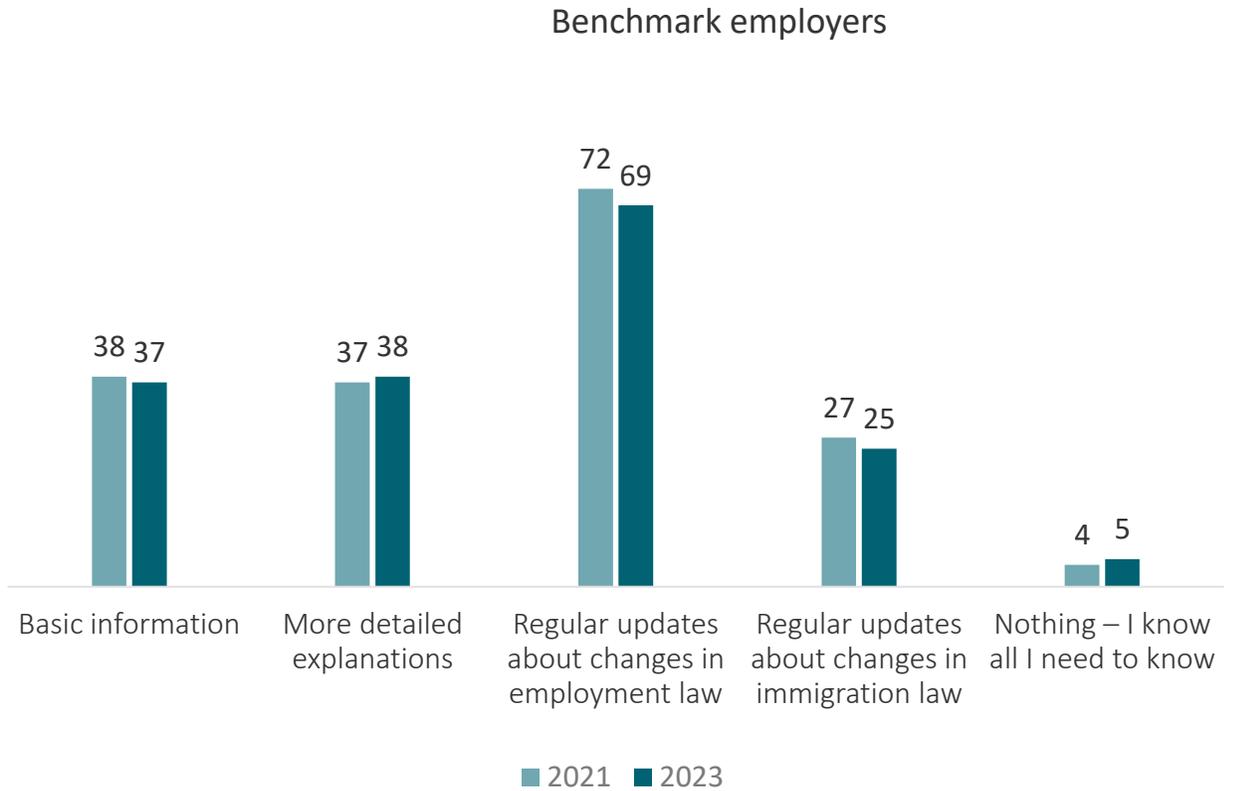
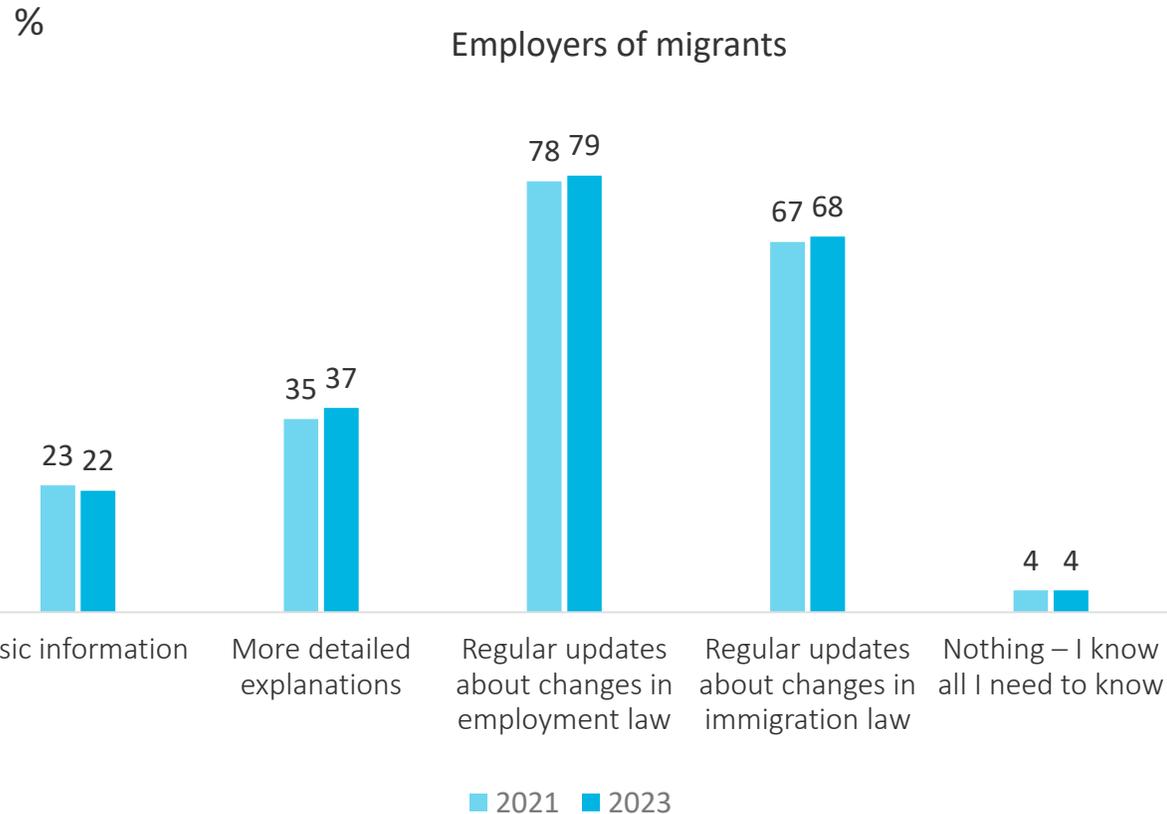
Normal working hours are still the most preferred time for employers to attend in-person courses or live webinars, with some employers needing greater flexibility.

Preferences for in-person courses or live webinars



Regular updates on employment law continue to be especially important to employers, and for employers of migrants regular updates on immigration law are also important.

Interest in specific types of employment law



What media do employers use?

Employers' media use is relatively stable, with small declines in consumption of mainstream news websites or TV.

Most employers are a member of an industry or community group. Membership of an industry sector organisation has grown since 2021.

Media consumption is broadly similar to 2021 levels, with small declines in news websites and free to air television.

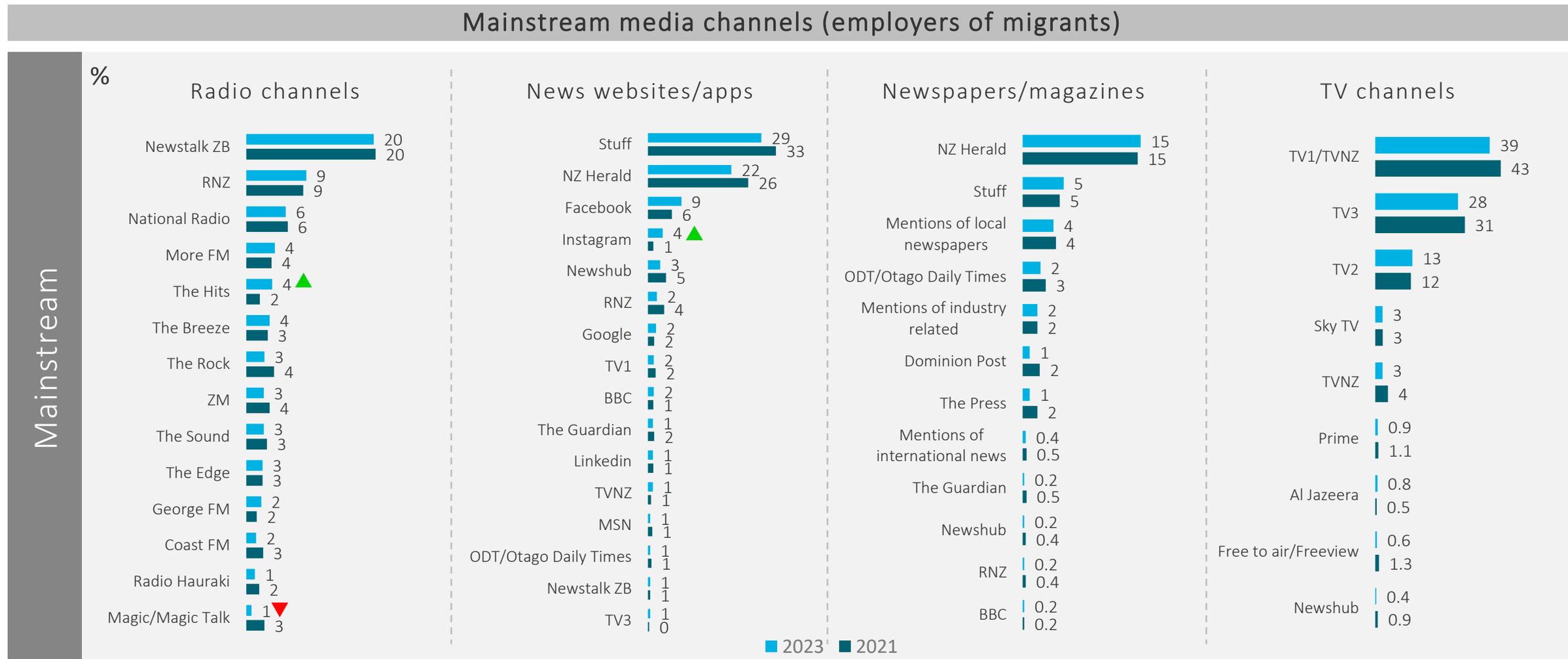
Media and social media used for at least an hour in the last week (employers of migrants)

%



▲ ▼ Significantly higher/lower than 2021

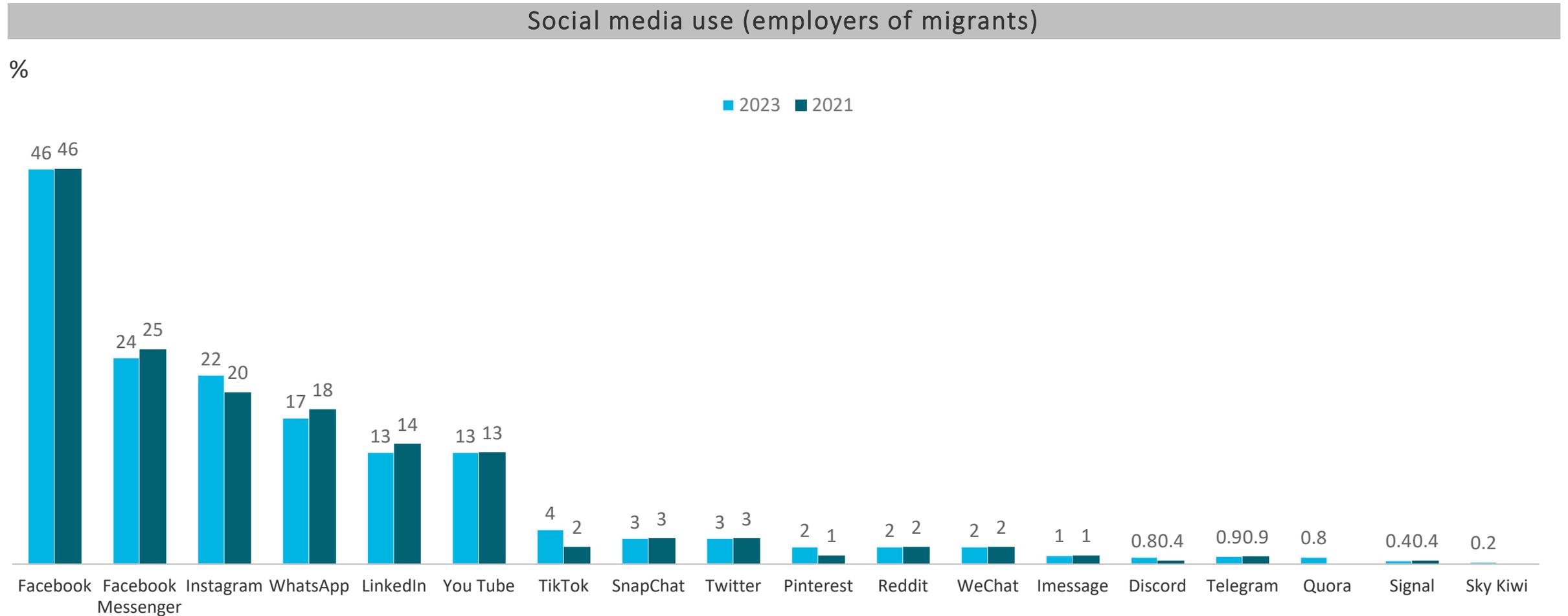
Respondents who indicated they listened to, watched, or read each of the mainstream media sources in the previous question (at least one hour per week), were then asked which specific channels, sites and publications they normally use. The graph below shows the respondent defined sources used. Results are based on all employers of migrants.



Likewise, the most popular ethnic media consumed is shown below. Again, these were respondent defined.

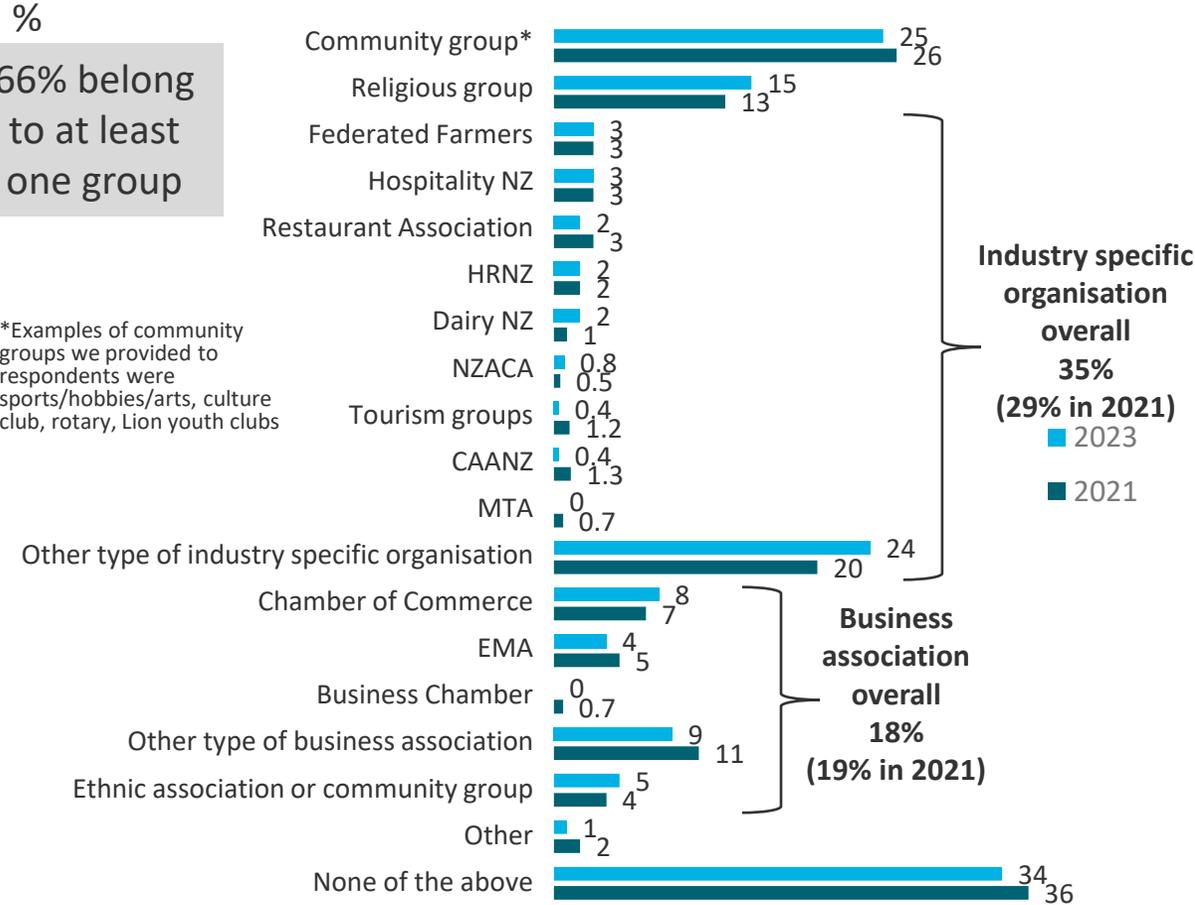


Facebook, Instagram, WhatsApp, LinkedIn and YouTube continue to be the most popular social media used by employers of migrants.

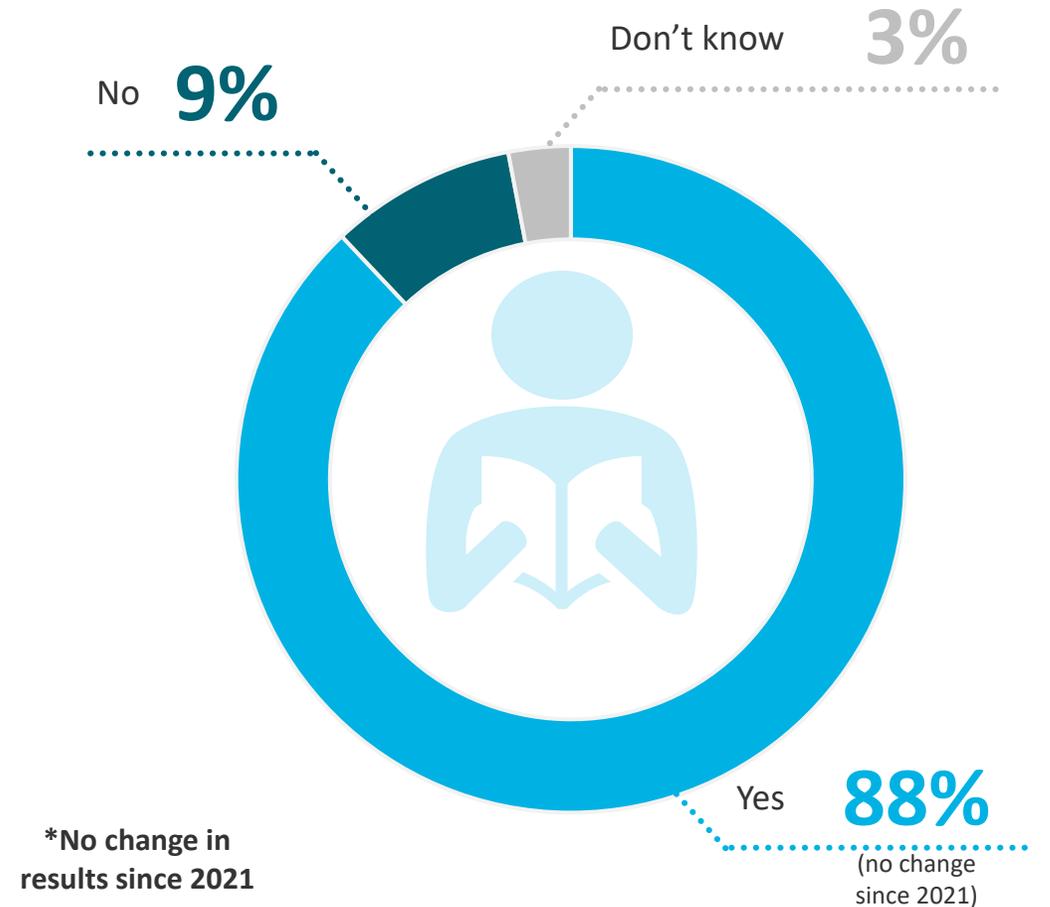


As in 2021, about two thirds of employers of migrants belong to some type of business/industry, religions, ethnic or community group. Most group members have engaged with written communications from one of those groups in the last three months.

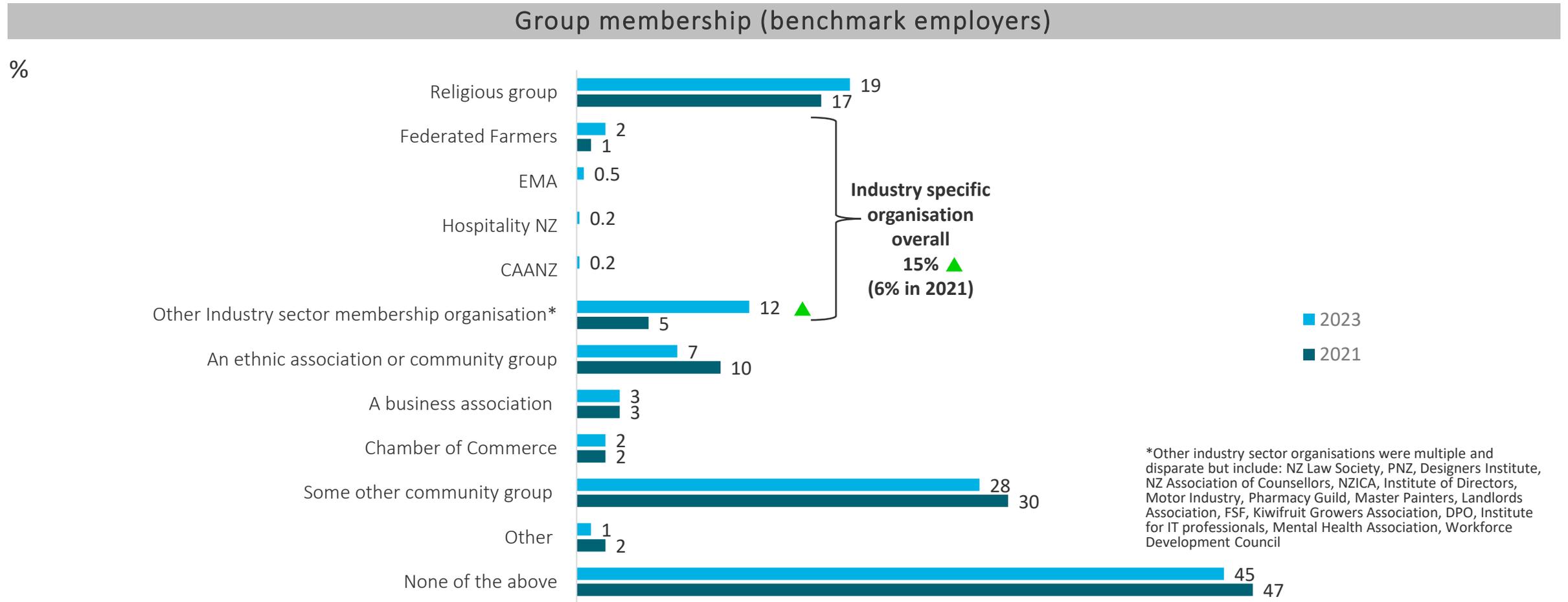
Group membership



Read a newsletter or update in the last three months*



Over half of benchmark employers belong to a business or community group. Membership of an industry sector organisations has grown since 2021.



What do employers say would encourage compliance?

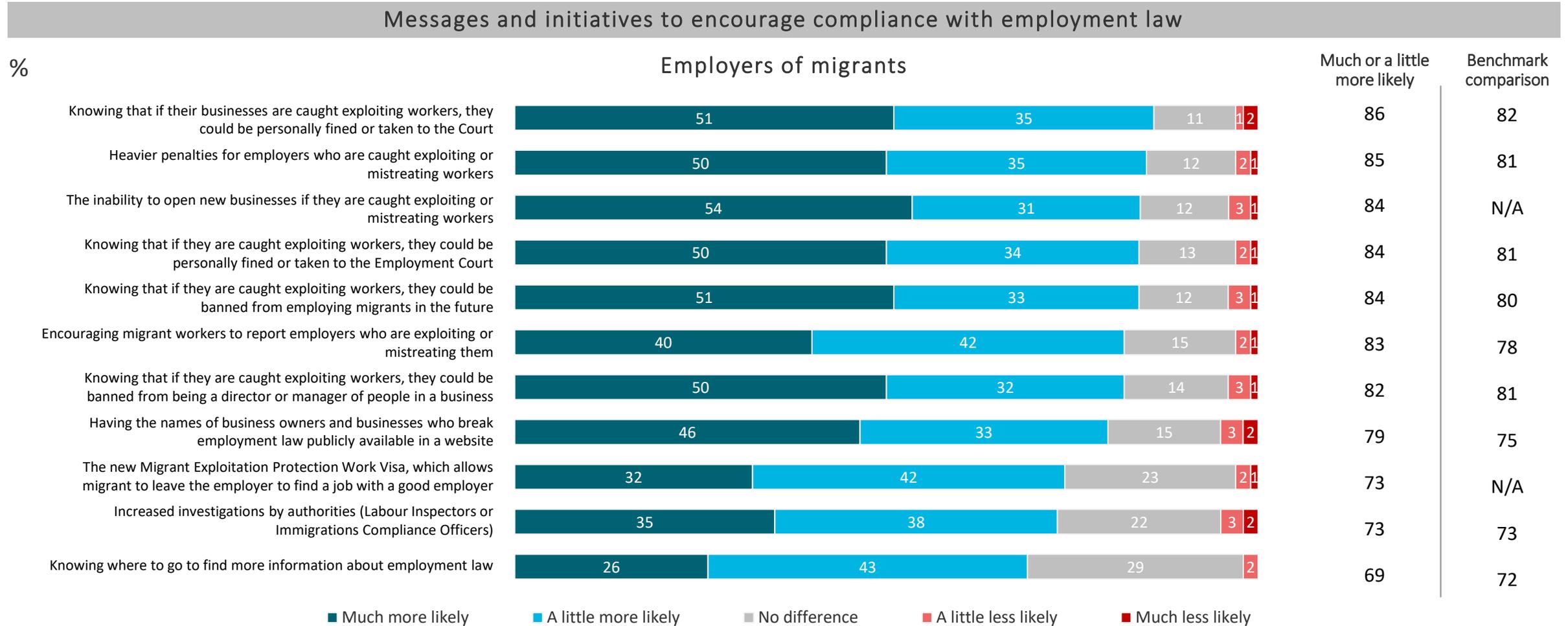
Punitive measures to encourage compliance are still favoured by employers over other measures.

This year, more employers of migrants suggest better support for employers as a way to encourage compliance (mainly by making it easier to employ migrants), while fewer benchmark employers felt worker conditions needed improving.

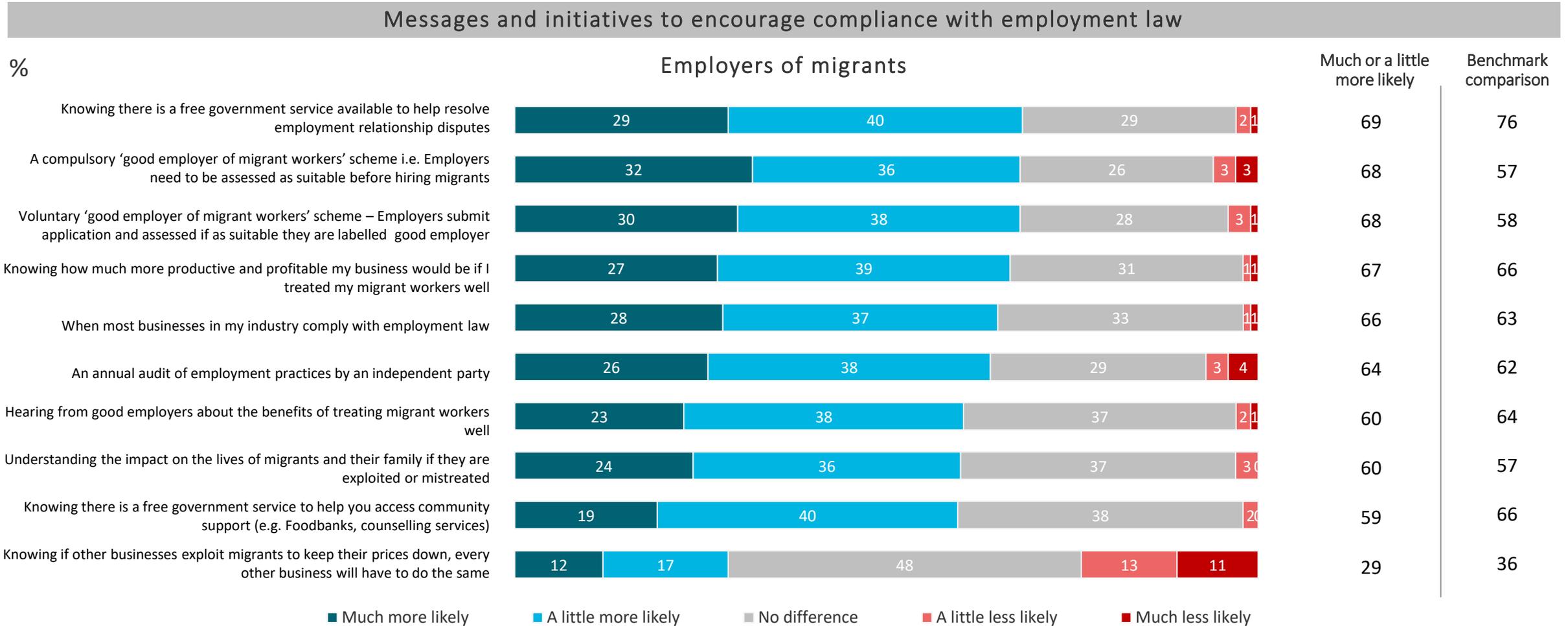
Compliance measures and better support to identify exploitation are still the most common suggestions to reduce exploitation of migrant workers. Compared to 2021, employers of migrants are more likely to suggest better support for employers, while benchmark employers are less likely to think workers conditions need improving.



There has been no material change in what types of messages employers think would encourage compliance – punitive measures are still favoured over others.



Around seven in ten employers think a free service available to help with employment disputes would encourage compliance with employment law.



This page details employers' suggestions for compliance measures including penalties.

Suggestions for compliance measures/ penalties



“Much heavier penalties when found to be exploiting workers i.e. jail time, seizure of earnings”

“The employer should be severely punished for exploitation.”

“We just need more policing of bad employers. I would say 90% + of our industry treat migrant workers well, but it is always a few that let the industry down. Sadly, this seems to be a lot with employers/employees of the same ethnicity. Government needs to crack down hard on those that exploit, and start with intervention instead of warnings.”

“Encouraging whistleblowing and publishing the full names of the exploitive employers.”

“Publicly share when companies are caught so others know there are consequences.”

	Employers of migrants	Benchmark employers
Compliance measures/penalties (nett)	26%	29%
Harsher penalties/punishment/prosecution of employers	8%	6%
Better enforcement/prosecution/punishment	5%	5%
Name and shame offending companies	5%	7%
Fines/heavy fines	4%	8%
Ban the business/person from working/hiring anyone	3%	4%
Auditing businesses/more audits	3%	2%
Accountability/personal liability	2%	3%
Employer reference/good/bad employer system/rating	1%	-
Focus/regulate groups known to exploit	1%	-
Assessment/investigation of businesses that employ migrant staff	-	3%

This page details employers' suggestions for better support to identify exploitation.

Suggestions for better support to identify exploitation



“Government staff talking to staff in shops during an audit rather than managers/directors”

“An independent party could be commissioned to check in with migrant workers on a regular basis to have a no-consequence, confidential line of communication for a migrant worker to express concern and seek advice on what to do if they are being exploited.”

“There is no back up device to migrant workers. The government simply don't keep in touch with them, if they did, maybe the exploited workers would talk about their experiences rather than be scared to talk.”

“More investigation into reported incidents and random checks of business in that industry to see how others are operating (to see if migrants are afraid in other areas or having issues with their employers).”

	Employers of migrants	Benchmark employers
Better support to identify exploitation (nett)	22%	27%
Surveillance/monitoring/policing/checks/inspections on businesses	7%	10%
Interviewing/surveying of migrant employees/all staff members	7% ▲ (+4)	2%
A place/safe place to report problems/reporting of exploitation	6% ▼ (-4)	11%
Better support/union/advocates for them	2%	4%
Better screening/vetting/background checks of businesses that employ migrants	2%	1%
Spot checks	-	3%
A register of employees	-	-

▲▼ Significantly higher/lower than 2021

This page details employers' suggestions for how Government can better support employers.

Suggestions for better employer support

%



“Make sure that the migrant workers are truthful at interviews. At the moment they say what you want to hear, you invest in them, then they leave which leaves a sour taste when considering future workers.”

“Allow employers that treat migrants fairly and the same as other employee's an easier path to employ more migrants with less red tape. There are no paths to offer migrants in our industry a way to having residency and this is vital to our future in this business. If we keep this up moving forward, we will have no hospitality businesses in New Zealand in 20 years.”

“Stop putting the wages higher every year . Leave it to the employer to give wages increases annual work anniversary to reward performance . It's a fairer way . Work for what you earn.”

“Reduce the immigration median wage bands to employ migrants, as now that employers have to pay such high wages to a migrant, I feel that bad employers will be exploiting migrants much more than ever due to the huge increased costs of employing them.”

	Employers of migrants	Benchmark employers
Better support for employers	15%▲ (+5)	4%
Easier to employ migrants	5%^ (+2)	-
Don't set wage threshold so high/Wages too high	4%	-
Less Government policies/red tape/tax on employers	3%	2%
Not assuming all employers are bad/praise for those doing well	3%	2%
Better screening process of migrants credentials	1%	-
Employ NZer's/make NZ unemployed take the jobs	1%	1%
Speed up employment authority process	*	-

^Statistically significant at the 90% confidence level ▲▼ Significantly higher/lower than 2021

This page details employers' suggestions for better protection and conditions for workers.

Suggestions for conditions and protection for workers



“Be fair and treat all workers as equals.”

“More flexibility in visas - currently migrants are initially tied to the employer who hired them and brought them to New Zealand, and it is difficult to legally change jobs / companies when on a temporary visa.”

“Welcome them and treat them well as not enough skilled New Zealanders to do the role in my industry being health.”

“Make it easier for them to change employers so they are not stuck with one employer”

“Free access to employment once in NZ, allowing mistreated employees to freely leave their employer and work for another accredited employer without the need to whistle blow and have months wait while INZ processes a visa change.”

	Employers of migrants	Benchmark employers
Better conditions/protection for workers	11%	7% ▼ (-7)
Easier for migrant workers to change jobs	5%	1%
Fairness/treat everyone the same	4%	2%
Respect for others	1%	1%
Be kind/understanding	1%	2%
Migrant worker protection/protection for deportation	1%	-
Ability of migrant to speak English	1%	-
Quicker follow up of complaints/quicker follow up	1%	-
Wage rate/better pay	-	1% ▼ (-4)
Better working conditions	-	*
Better/designated hours/breaks	-	*
Trust/honesty	-	*

▲ ▼ Significantly higher/lower than 2021

This page details employers' suggestions for better education and training.

Suggestions for better education and training



“Educating migrants to know their rights and options. A lot of migrants come from corrupt countries and as a consequence, they fear authority and have no faith in government processes.”

“Have the employment law and new visa for exploited immigrants as part of the visa application process in their own language rather than waiting until they arrive in NZ.”

“Migrant workers need to know the law themselves so they will not be exploited. Bad employers can exploit because of the workers ignorance. If every worker knows the law - minimum wages, annual holidays, sick leave etc then they will be in a better position to say no to bad demanding employers. Also, name and shame bad employers. Most of the industry is very small and word gets around very quickly.”

“If owners can be given free education and legal support around complicated NZ employment law it would help a lot. Punishing isn't effective way (it gives employers bad taste in the mouth when it comes to any employment issues). Owners need more support.”

	Employers of migrants	Benchmark employers
Education and training	15%	12%
Educate/advise employees of their rights/employment laws	9%	7%
Education/training for employer obligations/laws	3%	1%
Education/information/advice (non specific)	3%	3%
Provide translator/information in their own language	2%	
Clarity/simplified/easier to understand employment law	1%	1%

This page describes employers' suggestions for changes to immigration law.

Suggestions for changes to immigration law (3% of employers of migrants and <1% of benchmark employers)



“Make Work Visa/immigration laws easier so employers cannot exploit migrant employees”

“Allowing more flexibility with conditions of movement around visas such as changing location, employer and even job title. Lots of very skilled migrants locked into unskilled jobs because of our immigration settings for the past decade.”



“More simple criteria for employing migrants, a more efficient immigration process which will encourage more employers to follow”

“Speed up the visa process dramatically. Increase 3 month limits at employer.”

Segment profiles for migrant workers and employers of migrants

KANTAR PUBLIC



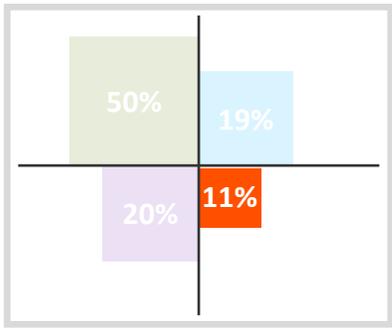
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Migrant worker segment profiles

KANTAR PUBLIC



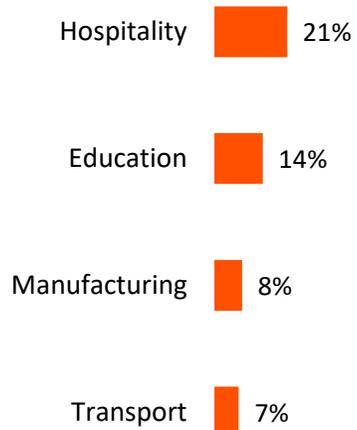
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DISHEARTENED are at most risk of being exploited. They have little understanding of their employment rights, are unlikely to speak up about mistreatment and feel unhappy with their employment situation

EMPLOYMENT SITUATION

Top industries



- **Least satisfied** with their employment situation (only 26% are satisfied).
- **Greatest concerns with employment** (95% cited at least one concern). Top 5 concerns are workplace racism (28%), lower pay than their Kiwi colleagues (23%), job not matching what was promised (21%), lack of breaks (17%), and harassment (14%).
- **Many feel frustrated** (48%), anxious (36%), and disrespected (30%).
- **Work longer hours** – 36% work more than 40 hours (vs 26% of all migrants)

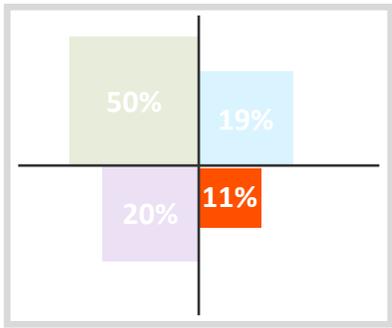
KNOWLEDGE AND UNDERSTANDING

- Rate themselves the lowest for their understanding of employment rights (73% say they only know ‘a little bit’ or nothing at all).
- Nearly two thirds (64%) don’t understand five more the aspects of employment law.
- Like all segments, online is the main source of useful employment information (64%), but over one in four (26%) find it difficult to find employment information online.
- Less likely to find government websites useful sources of information.
- Low awareness of migrant exploitation protection work visa (10%).

HIGHEST RISK OF EXPLOITATION



- Most likely to have an employer who does things that are against employment law (40%).
- Say they’d put up with bad things because they feel lucky to have their job (37%)
- Most likely to think they can’t expect the same rights as New Zealanders (49%).
- The segment most likely to feel it would be difficult to speak up (52%)
- Believe bad things would happen to them or their family if they spoke up (37%).
- Fears of being deported if they lost their job (30%).
- Don’t know where to go if they needed help (50%).
- Least likely to have close family or relatives living in NZ (35%).

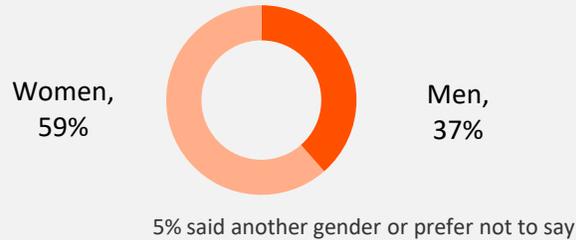


DISHEARTENED are at most risk of being exploited. They have little understanding of their employment rights, are unlikely to speak up about mistreatment and feel unhappy with their employment situation

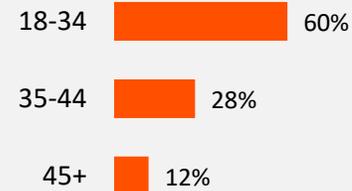
DEMOGRAPHICS



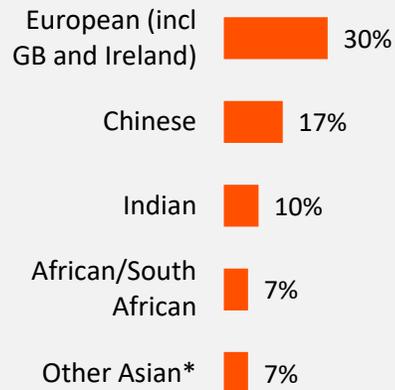
GENDER



AGE

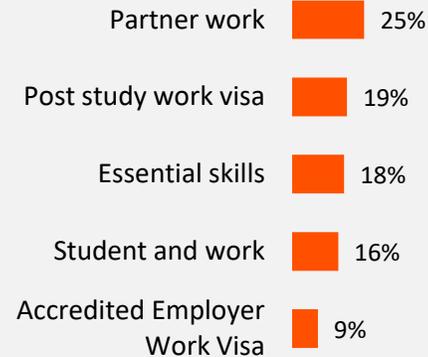


TOP 5 WORKER NATIONALITIES



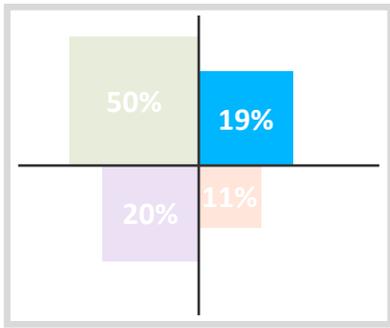
*4% Filipino not shown on chart

TOP 5 VISAS



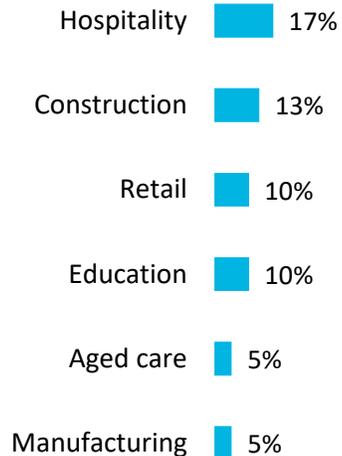
- The Disheartened are skewed towards women – in part this reflects the higher-than-average proportion of migrants working in Hospitality and Education (shown on previous page).
- Slightly more likely to have been in NZ longer (81% for between 3 to 5 years, compared to 73% of migrant workers in other segments).
- While the student and work visa is a less common visa type, it is more common in the Disheartened segment (and the Naive but unexploited segment) than other segments.

KNOWLEDGABLE, BUT TRAPPED have a good understanding of their employment rights. However, they are more reliant on their employment and at risk of exploitation.



EMPLOYMENT SITUATION

Top industries



- Most (84%) have at least one concern about their employment. Most common concerns are being paid less than NZ colleagues (25%), the job not being what was promised (17%), not being paid for all hours worked (13%), not having breaks (12%), and being regularly swore at (11%).
- Low satisfaction with employment (40%).
- Feel frustrated (28%), anxious (34%), worried (22%) – much more than the two unexploited segments, but unlike the *Disheartened* segment the *Knowledgeable but trapped* feel accepting (43%) of their situation.

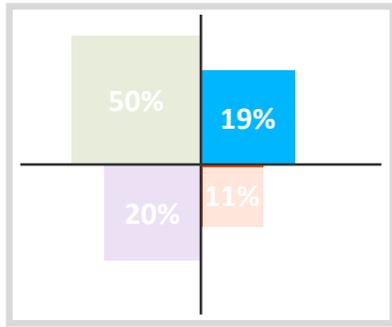
KNOWLEDGE AND UNDERSTANDING

- Rate themselves below average for understanding employment rights (50%, compared to 60%,) but do have a good understanding of employment rights when tested (second only to the Capable segment).

HIGHER POTENTIAL FOR RISK OF EXPLOITATION



- The segment most likely not to have a written employment contract (4%, compared to 3%).
- 3% say they are paid less than \$20 per hour (since April 2021).
- Need the job to financially support themselves and family (37% strongly agree vs 25% of unexploited segments)
- Need their job for NZ residency (63%).
- Less likely to know where to go for help (49%, vs 62% on average for unexploited segments).
- Cultural factors at play – 43% say it is not okay to disagree with your boss.
- A quarter (24%) say their employer breaks employment laws, and 29% say they would put up with things that are against employment law.
- 28% would get deported if they lost their job.
- 22% say bad things would happen if they spoke out against their employer.



KNOWLEDGABLE, BUT TRAPPED have a good understanding of their employment rights. However they are more reliant on their employment and at risk of exploitation.

DEMOGRAPHICS



GENDER

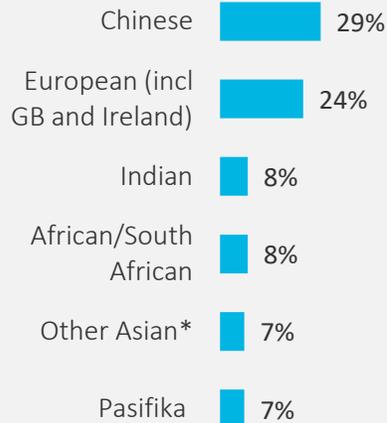
Women, 53%



Men, 46%

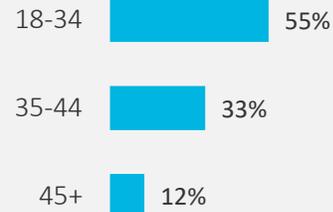
1% said another gender or prefer not to say

TOP WORKER NATIONALITIES

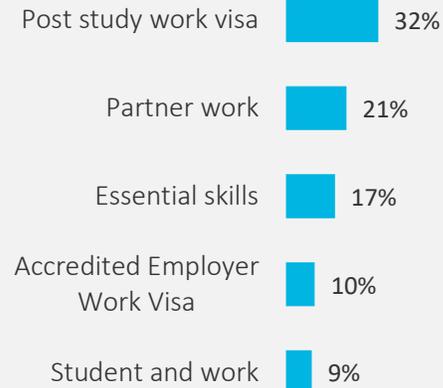


*3% Filipino not show in chart

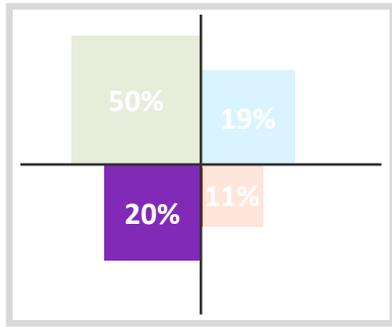
AGE



TOP 5 VISAS



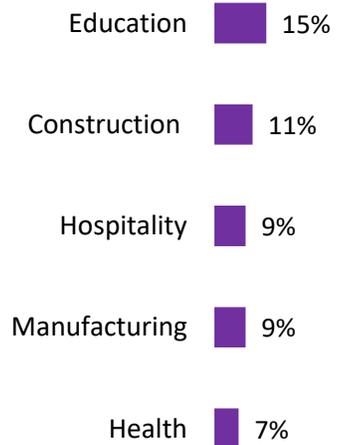
- Range of visa types, but the segment with the highest post study work visa.
- One of two segments (along with the Capable) with the highest proportion of Chinese migrant workers.
- Slightly older age profiles than other segments.
- More likely to have close family or relatives in New Zealand (47%, vs 38% of workers in the two low knowledge segments) .



NAIVE, BUT UNEXPLOITED know less about their employment rights, but are also less vulnerable to exploitation and happier with their employment situation

EMPLOYMENT SITUATION

Top industries



- High job satisfaction (79%).
- Very few concerns with current employment situation (9%).
- Skew to working fewer hours (18% work up to 20 hours, compared to 13% of all migrants).
- Positive emotions associated with their employment including feeling appreciated (53%), happy (48%), grateful (45%), accepting (37%), and trusting (28%).

KNOWLEDGE AND UNDERSTANDING

- Below average self-rating for understanding their employment rights (50%, compared to 60% of all migrants).
- Know the least about employment rights when tested (97% lack understanding in at least three aspects of employment law).
- Lowest awareness of the migrant protection work visa (8%).

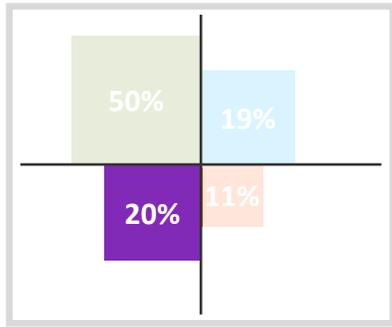
LOWER RISK OF EXPLOITATION



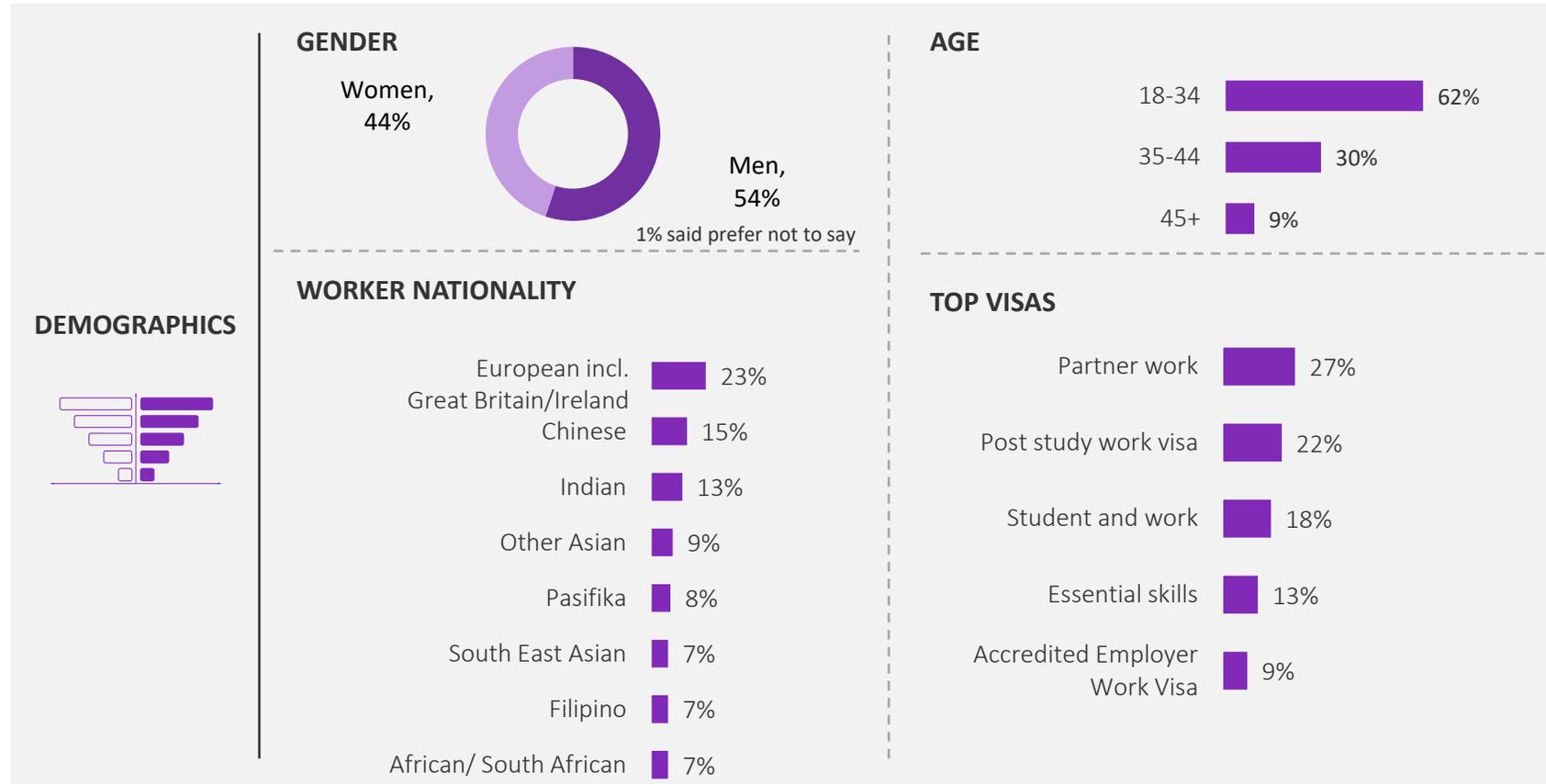
Less likely than average to:

- Feel they would be deported if they lose their job (7% vs 19% on average)
- Need job for residency (45%, compared to 55% of all migrant workers)
- Say they have an employer who does things that are against employment law (5%, compared to 32% of segments at higher risk of exploitation).

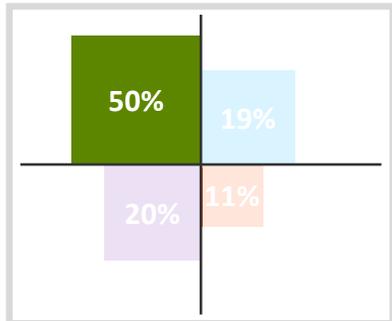
More likely to feel working conditions in NZ are much better than in their home country (72% vs 62% on average).



NAIVE, BUT UNEXPLOITED know less about their employment rights, but are also less vulnerable to exploitation and happier with their employment situation



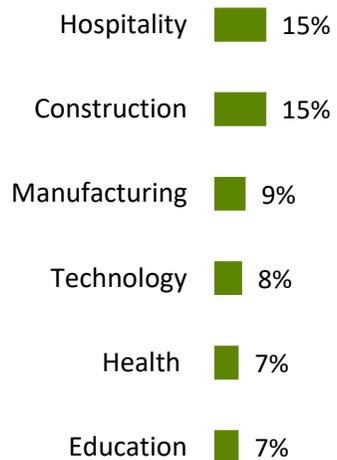
- The segment most likely to have come to NZ for a NZ education or qualification (32% vs 21% on average).
- While the student and work visa is a less common visa type, it is more common in the Naive but unexploited segment (and the Disheartened segment) than other segments



CAPABLE know their employment rights, are not exploited and know where to get help if they need it.

EMPLOYMENT SITUATION

Top industries



- Highest job satisfaction (84%).
- No concerns with current employment situation (0%).
- Skew to working 31-40 hours a week (59%).
- Skew to knowing they are paid above minimum wage (94% vs 87% of other segments).
- Common feelings associated with their employment are feelings of being appreciated (52%), happy (49%), grateful (43%), calm (36%), trusting (29%), accepting (28%) and delighted (25%).

KNOWLEDGE AND UNDERSTANDING

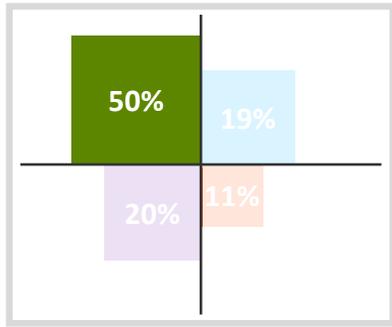
- Rate themselves highly for understanding their employment rights (76% well or very well).
- Strongest understanding of employment rights when tested.
- Higher awareness of the migrant protection work visa (20%) than exploited segments.
- Most (74%) know where to go or who to ask for help if they need support with their employment rights.

Capable workers are secure in their employment:

VERY LOW RISK OF EXPLOITATION



- Expect to have the same working conditions as their Kiwi colleagues.
- They are less likely to feel they could be easily replaced.
- They don't put up with things that are against employment law.
- Don't have an employer who does things that are against employment law.
- Feel more confident disagreeing with their boss than other segments.
- Don't feel bad things would happen to them if they spoke up.
- Are at low risk of deportation if they lost their job
- The segment most likely to feel it would be easy to speak up in an exploitative situation.



CAPABLE know their employment rights, are not exploited and know where to get help if they need it.

DEMOGRAPHICS



GENDER

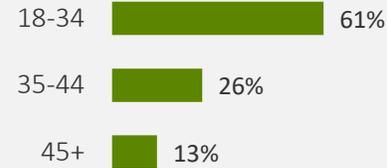
Women,
42%



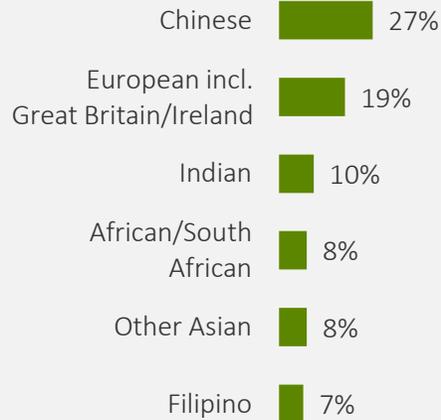
Men,
57%

1% said prefer not to say

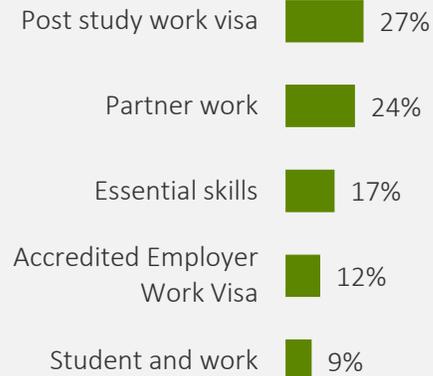
AGE



WORKER NATIONALITY



TOP VISAS



STATUS

- Skewed towards men, reflecting relatively high proportions working in the male dominated sectors of construction, manufacturing and technology.
- More likely to have close family or relatives in New Zealand (48%, vs 38% of workers in the two low knowledge segments).

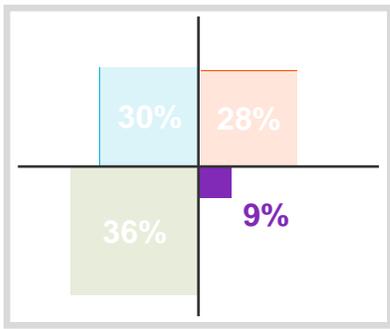


Employers of migrants segment profiles

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POTENTIAL EXPLOITERS see themselves as under strong business pressures, and doing what they must to get by.

Many are smaller businesses

- 55% live in Auckland.
- Smaller businesses – 35% have 1 to 5 employees.
- 20% are in Construction (vs 13% for other segments), 17% are in technology (vs 4% for other segments).
- 35% have Chinese workers (vs. 12% for other segments).
- 59% of employers non- NZ European.

Poor knowledge of employment law

- 22% say they know only 'a little bit' or nothing at all.
- Lacked knowledge in four of the 19 employment areas tested on average.

Current information sources often ineffective

- 41% find it difficult to find information online.
- Less likely than other segments to find information sources helpful.
- Less likely than other segments for find INZ and ENZ information useful
- Interested in range of information types, but greater call for more detailed information (48% vs 35% for other segments).
- Most helpful learning ideas considered to be:
 - Information in their own language (67%)
 - Website explaining employment law (65%)

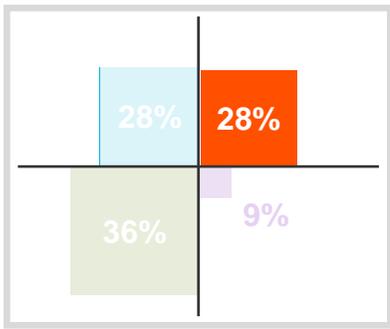
Some improved attitudes; however, still the weakest moral obligation to do the right thing compared to other segments

- Sometimes you need to go against the employment rules to keep the business running (37%).
- Even if I have to pay fines and penalties it is worthwhile exploiting migrant workers (13%).
- It is really hard to make a profit in our industry, we need to do everything we can to get an advantage over the competition (74%).
- If other businesses in our industry exploit migrant workers, this must be ok for me to do it too (17%).
- Migrants owe employers for giving them a job (20%).
- If a migrant worker left, we could easily replace them (22%).
- I treat my migrant workers differently to my Kiwi workers (9%).
- Some of the Government's employment rules and regulations make doing business difficult in my industry (93%).
- Employers don't care if they break the law, because it takes too long for government to resolve the issue (35%).
- I find it difficult to understand my employer obligations in NZ (24%).

Generally the **least enthusiastic about ideas to improve compliance** – the 'stick' still seen to be more effective than the 'carrot'.

Majority consume mainstream media, but ethnic media also important

- 63% consume mainstream media and 26% consume ethnic media (highest of any segment).
- 37% consume social media (lowest of any segment).
- Less likely than other segments to belong to a business or community group (54%).



CONFLICTED aim to do the right thing, but can find it hard going to do so.

Industry profile and worker profile (visa types) largely reflects industry averages.

Key exceptions:

- 31% of *Conflicted* employers are in hospitality (vs 18% for other segments).
- 21% of *Conflicted* employers are in dairy farming (vs 10% for other segments).
- 31% of *Conflicted* employers are small business with 1-5 employees (vs 18% of the two segments with stronger moral obligation).

Need help to find suitable information

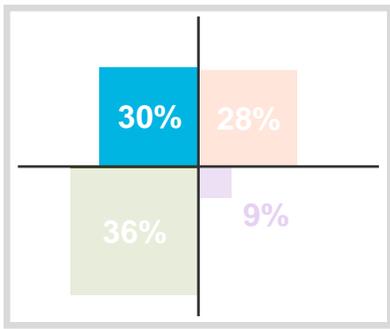
- 40% find it difficult to find information online.
- Most helpful learning ideas considered to be a website on employment law (69%), a helpline/call centre for employers (69%) and a free Government service for employment dispute resolution (66%).

Want to do the right thing, but find it difficult

- If I knew my obligations, I would comply with them (93%).
- My migrant workers are aware of the NZ employment law (88%).
- I find it difficult to understand my employer obligations in NZ (22%).
- It is hard to keep up with immigration laws (97%).
- It is hard to keep up with employment laws (88%).
- It is difficult to find good NZ staff (98%).
- The employment law for migrant workers doesn't really work in the industry our business operates in (63%).
- It is really hard to make a profit in our industry, we need to do everything we can to get an advantage over the competition (66%).
- Some of the Government's employment rules and regulations make doing business difficult in my industry (99%).

Mainstream media users

- Largely consume mainstream media (79%) and 61% use social media.



VIRTUOUS AND COMPLIANT believe in both their duty of care and reputation as an employer.

Larger businesses, and many with Indian workers

- Larger businesses: 41% have 50+ employees.
- 41% have Indian workers.
- Gender balance of male and female employers.

Very knowledgeable

- All *virtuous and compliant* employers rate themselves highly on their knowledge of employment rights (100% ‘very well’ or ‘well’).
- Average of 17 correct answers out of 19 when knowledge tested.

More enthusiastic than other segments about learning opportunities

More open to suggestions made to improve compliance in the industry than other segments (particularly *Conflicted* and *Potential Exploiters*).

Mainstream media users

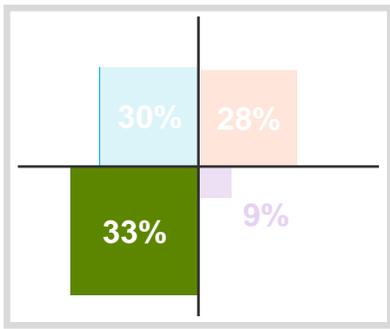
- Largely consume mainstream media (89%), and 59% use social media.

Strong moral obligation and belief in the value of migrant workers

- Employers have a duty of care to and moral responsibility to help and support their migrant workers’ wellbeing (88% strongly agree).
- The better you treat employees, the more successful your business will be (88% strongly agree).
- The reputation of our business as a good employer is important to be able to attract skilled staff in the future (93% strongly agree).
- Employers who mistreat their workers don’t get caught because there are not enough government officials looking for bad employers (51%).
- I know where to go or who to ask for help, if I need support with understanding my employment obligations (98%).

Find it easy to get information and like regular updates

- List multiple sources of useful information.
- 91% find it easy to find information online.
- Rate each of the government websites highly.
- Keen to receive regular updates on employment (84%) and immigration (75%) law.
- Mainstream media (89%) and social media (58%) users.



DOING RIGHT BY WORKERS middle of the road employers with decent knowledge and attitudes.

Industry profile and profile of workers (visa types) reflects industry averages.

Average knowledge

- Rate own knowledge of employment law as understanding it ‘well’ (49%) rather than ‘very well’ (42%).
- Tested knowledge is average: 16 out of 19 correct answers.
- 17% lacked knowledge on at least 5 aspects of employment law

Generally less enthusiastic (than employers with a stronger moral compass) about suggestions for improving compliance.

Mainstream media users

- Largely consume mainstream media (84%), especially TV (54%).
- 66% use social media.

Reflect a ‘middle of the road’ stance attitudinally (across most attitudes measured).

75% find it easy to find information online.

Top 3 learning ideas that would help:

- Website explaining employment law (84%)
- Helpline/call centre for employers (74%)
- A free Government service to help resolve employment relationship disputes (71%)



FOR FURTHER INFORMATION PLEASE CONTACT

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