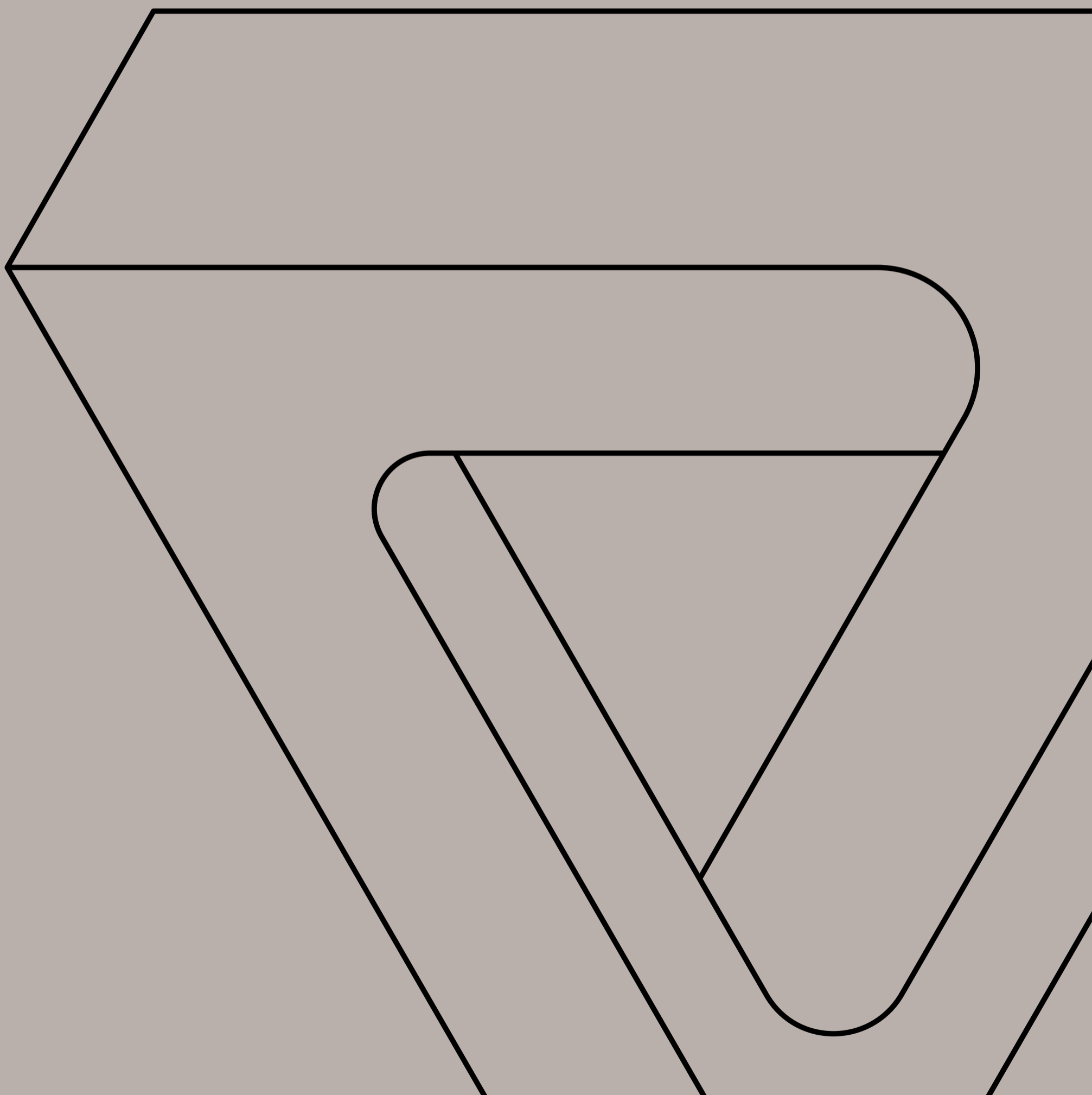
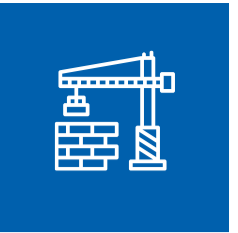


A SNAPSHOT OF FINDINGS FROM THE 2024
EMPLOYMENT MONITOR

Workers and employers in NZ – industry comparisons





Workers and employers in NZ – industry comparisons

MBIE's employment monitor delivers a comprehensive view of New Zealand workers' and employers' perceptions, experiences and pressures in the employment market. This infographic focuses on key industries of interest. Verian surveyed 855 employers from 26 February to 21 April 2024 and 1,754 workers from 26 February to 7 April 2024.

Statistical significance

Maximum sampling errors vary according to the sample size in each industry. The reader should take care in interpreting results in industries with less than 50 respondents. Sample sizes are shown in the sample profile charts.

How to interpret the 'heat maps' in this infographic

Heat maps have been created using industry rankings for each measure (not statistical significance). The numbers shown in each cell refer to the survey results for that measure. **Green** depicts more positive results, while **red** depicts less positive results.

Sample profile – workers in key industries

Industry (n)	%	Union member All NZ (21)
Agriculture & dairy farming (n=71)	2	11
Forestry & fishing (n=42)	1	18
Horticulture & viticulture (n=85)	1	0
Technology (n=146)	10	7
Education & training (n=128)	8	39
Hospitality (n=52)	4	3
Transport (n=112)	3	21
Construction (n=143)	9	4
Retail (n=146)	9	8
Health & aged care (n=127)	8	48
Manufacturing (n=165)	10	18
Domestic work (n=36)	3	17

31% of workers surveyed were in industries outside of the ones shown on this chart.

Industry variations of up to 19 percentage points exist in worker satisfaction with their employment situation and trust in their employer.

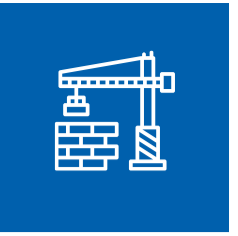
Overall satisfaction peaks in agriculture and is lowest in retail trade, transport and healthcare/aged care. Worker trust in their employer often goes hand in hand with employment satisfaction.

Overall perceptions of job	All workers	Agriculture & dairy farming	Forestry & fishing	Horticulture & viticulture	Technology	Education & training	Hospitality	Transport	Construction	Retail trade	Health & aged care	Manufacturing	Domestic work
% satisfied with employment situation	80	91	78	84	86	84	82	75	80	74	75	81	82
% trust employer	71	76	67	76	73	80	60	71	74	67	61	65	76

More than half of workers in hospitality, health & aged care, and domestic work say they have current employment concerns or breaches of their contract.

Pay related concerns are most common in domestic work, while hours related concerns are most prevalent in hospitality and domestic work.

% with employment concern or employment breach	All workers	Agriculture & dairy farming	Forestry & fishing	Horticulture & viticulture	Technology	Education & training	Hospitality	Transport	Construction	Retail trade	Health & aged care	Manufacturing	Domestic work
One or more employment concerns	45	36	47	39	40	49	62	46	40	49	58	50	55
Pay related employment concern	23	19	28	21	15	35	31	28	26	18	27	27	49
Harassment or discrimination	15	11	24	8	15	22	19	13	15	11	21	15	18
Hours related employment concern	18	21	27	10	16	26	34	23	18	16	26	14	33



Workers and employers in NZ – industry comparisons

Perceived worker replaceability varies across industries by more than 20 points. The survey measured two key factors that reflect potential worker vulnerability: worker replaceability and reliance on the job for financial support.

Perceptions of job replaceability vary markedly by industry, with greatest vulnerability seen in health & aged care, retail trade and construction. Around three quarters or more of workers in each industry feel strongly reliant on their job for financial reasons.

Potential vulnerabilities (% agree)	All workers	Agriculture & dairy farming	Forestry & fishing	Horticulture & viticulture	Technology	Education & training	Hospitality	Transport	Construction	Retail trade	Health & aged care	Manufacturing	Domestic work
Employer could easily replace me	67	56	60	60	59	58	66	58	70	75	79	62	55
Essential to stay in job for financial reasons	80	73	74	74	78	86	83	73	79	75	82	82	80

Workers in agriculture and education & training would find it the **hardest to 'speak up' if faced with an exploitative situation.**

Different factors can shape how a worker feels they could 'speak up' in an exploitative situation.

For example, while high levels of trust underpin the worker-employer relationship in agriculture, workers in this sector would find it more difficult than other workers to speak up when something's not right. This may be related to the closer personal connections they have with their employer (44% of workers in agriculture got their job through friends or family).

Speaking up	All workers	Agriculture & dairy farming	Forestry & fishing	Horticulture & viticulture	Technology	Education & training	Hospitality	Transport	Construction	Retail trade	Health & aged care	Manufacturing	Domestic work
% say it would be difficult to speak up in exploitative situation	37	57	30	29	36	53	27	46	28	37	33	33	40

Workers in agriculture and domestic work have both relatively low knowledge and uncertainty about where to go for information and support.

	All workers	Agriculture & dairy farming	Forestry & fishing	Horticulture & viticulture	Technology	Education & training	Hospitality	Transport	Construction	Retail trade	Health & aged care	Manufacturing	Domestic work
Self-rated understanding (% well/very well)	81	74	74	89	81	75	79	90	83	80	72	83	77
Average number of employment rights misunderstood or unsure about (tested out of 14)	3.6	3.6	3.7	2.9	3.7	3.6	3.8	2.9	4.1	3.6	3.3	3.1	4.4
Know where to go for information and support on employment rights (%)	76	65	86	76	72	73	71	75	76	73	77	81	67





Workers and employers in NZ – industry comparisons

We've identified four groups of workers who differ on their knowledge of employment rights and risk of exploitation.

About one in three NZ workers are at potential risk of exploitation – 18% know their employment rights, but feel strongly reliant on their job for financial reasons. And 13% don't know much about their employment rights or where to go for help, and fear losing their job.

CAPABLE

- Good understanding of employment rights.
- High satisfaction with employment situation and strong trust in employer.
- Few report concerns with their employment.
- More likely than others to speak up in exploitative situations.
- Most know how to find help with their employment if they need it.

More knowledge about employment rights

KNOWLEDGEABLE BUT TRAPPED

- Good understanding of employment rights.
- Low job satisfaction and often frustrated.
- Work longer hours on average.
- Wide-ranging employment concerns and employment law breaches.
- Skew towards mid/higher income households.

Lower risk of exploitation

Higher risk of exploitation

- Poorer understanding of employment rights, but few employment concerns.
- Satisfied with their employment and trust their employer.
- Less trusting of government sources and less likely to speak up.
- Youngest segment.

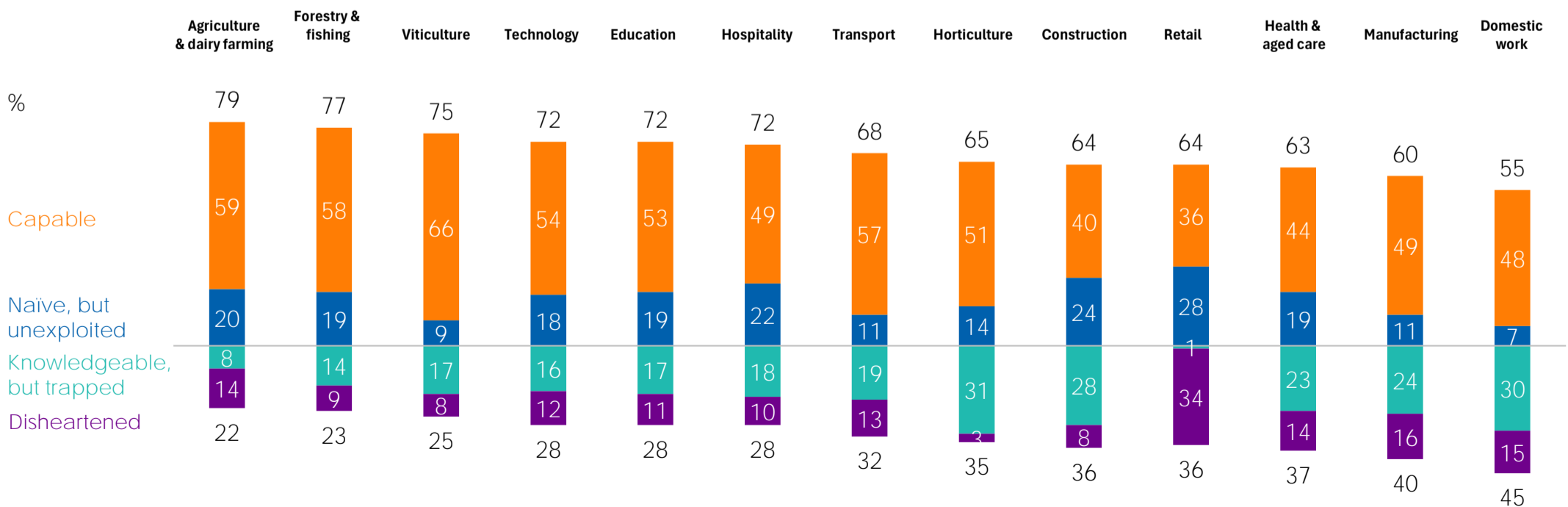
- Poor understanding of employment rights.
- Dissatisfied with employment and very low trust in employer.
- Feel frustrated, fearful and anxious about their work situation.
- Wide-ranging employment concerns and employment law breaches.
- Lower trust in government agencies to support workers.
- Skew towards low income households.

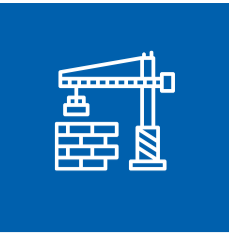
NAÏVE, BUT UNEXPLOITED

Less knowledge about employment rights

DISHEARTENED

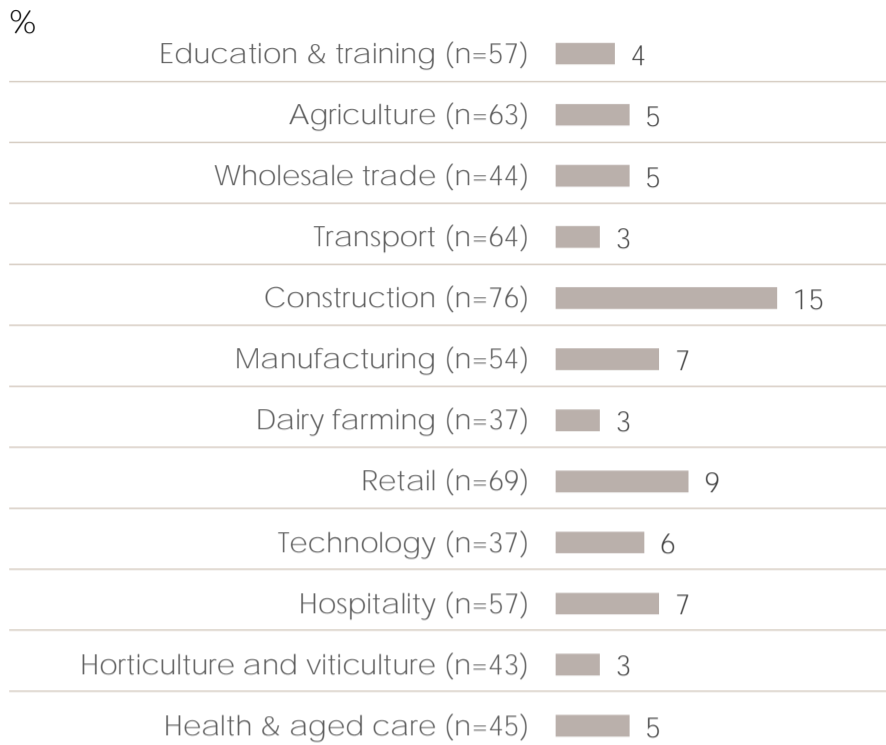
Industries with the greatest risk of exploitation are domestic work, manufacturing, health/aged care, and retail.





Workers and employers in NZ – industry comparisons

Sample profile – employers in key industries

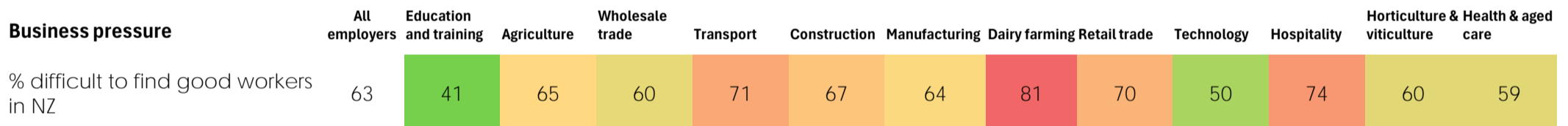


28% of employers surveyed were in industries outside of the ones shown on this chart.

Finding good workers is a key business pressure for employers.

Employers in dairy farming, hospitality, transport, and retail trade are most likely to feel it's difficult to find good workers.

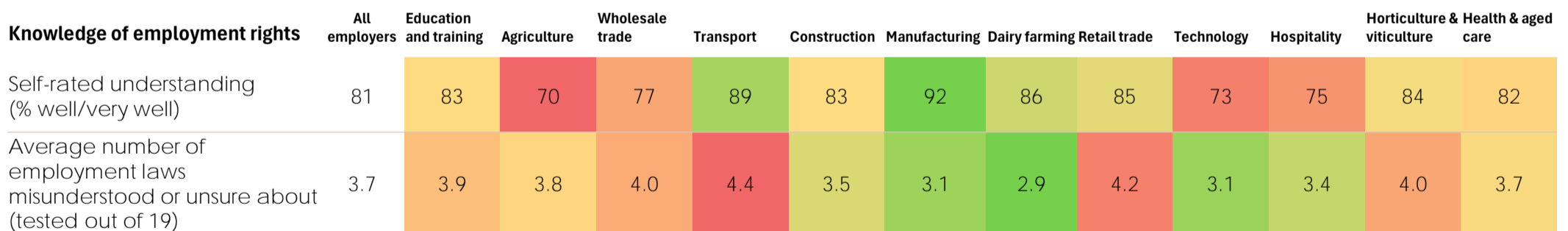
Business pressure



Most employers in all sectors are confident of their understanding of employment obligations.

However, employers in transport, retail, and horticulture/viticulture have the biggest tested knowledge gaps.

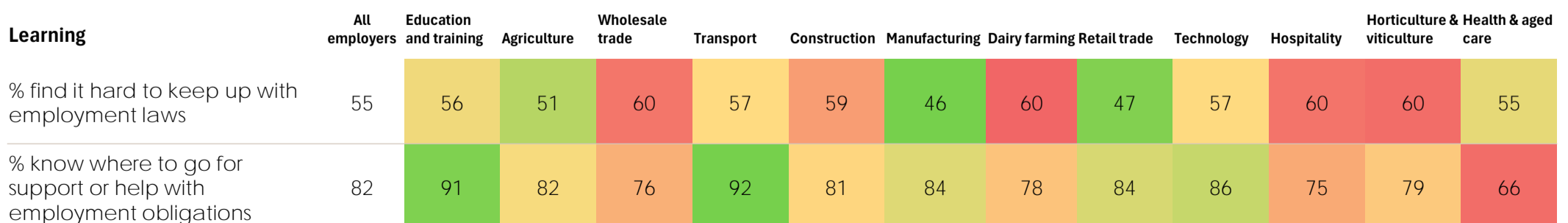
Knowledge of employment rights

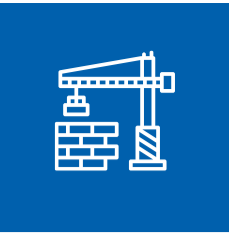


Many of the sectors that find it hard to keep up with employment laws also don't know where to go for support or help with employment obligations.

These barriers are especially prevalent in wholesale trade, construction, dairy farming, hospitality, horticulture & viticulture, and health & aged care.

Learning





Workers and employers in NZ – industry comparisons

We identified four groups of employers that sit along two spectrums in line with the strength of their attitudes to moral and legal compliance.

'Potential exploiters' are a sizeable group of NZ employers. This reflects the large number of small businesses in NZ. Small employers tend to know less about their employment obligations and exhibit weaker legal compliance creating risk of worker exploitation.

VIRTUOUS AND COMPLIANT

Stronger (consistent) legal compliance

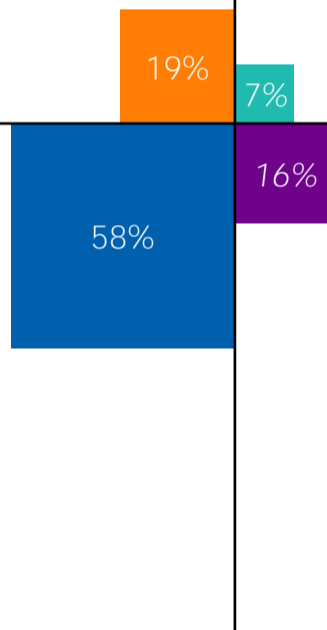
CONFLICTED

- Strong moral responsibility.
- Strong legal compliance.
- Good understanding of employment rules and regulations.
- Skewed to larger businesses (50+ workers).

- Below average understanding of employment rules and regulations.
- Struggle with employment law but informed workers can ensure compliance.
- Face strong business pressures.
- Difficulties in finding good staff.
- Tend to be mid/larger businesses (10+ workers).

Stronger moral obligation

Weaker moral obligation



- Average understanding of employment rules and regulations.
- Tend to comply with employment law, but not strongly motivated to.
- Tend to be smaller businesses.

- Poor knowledge of employment rules and regulations.
- Strong business pressures – bend employment law to keep business running.
- Weak moral obligation towards workers.
- Predominantly small businesses..

DOING RIGHT BY WORKERS

Weaker (contextual) legal compliance

POTENTIAL EXPLOITERS

The potential for worker exploitation is highest in sectors such as retail, technology, health & aged care.

