

Crunch time

June 2017

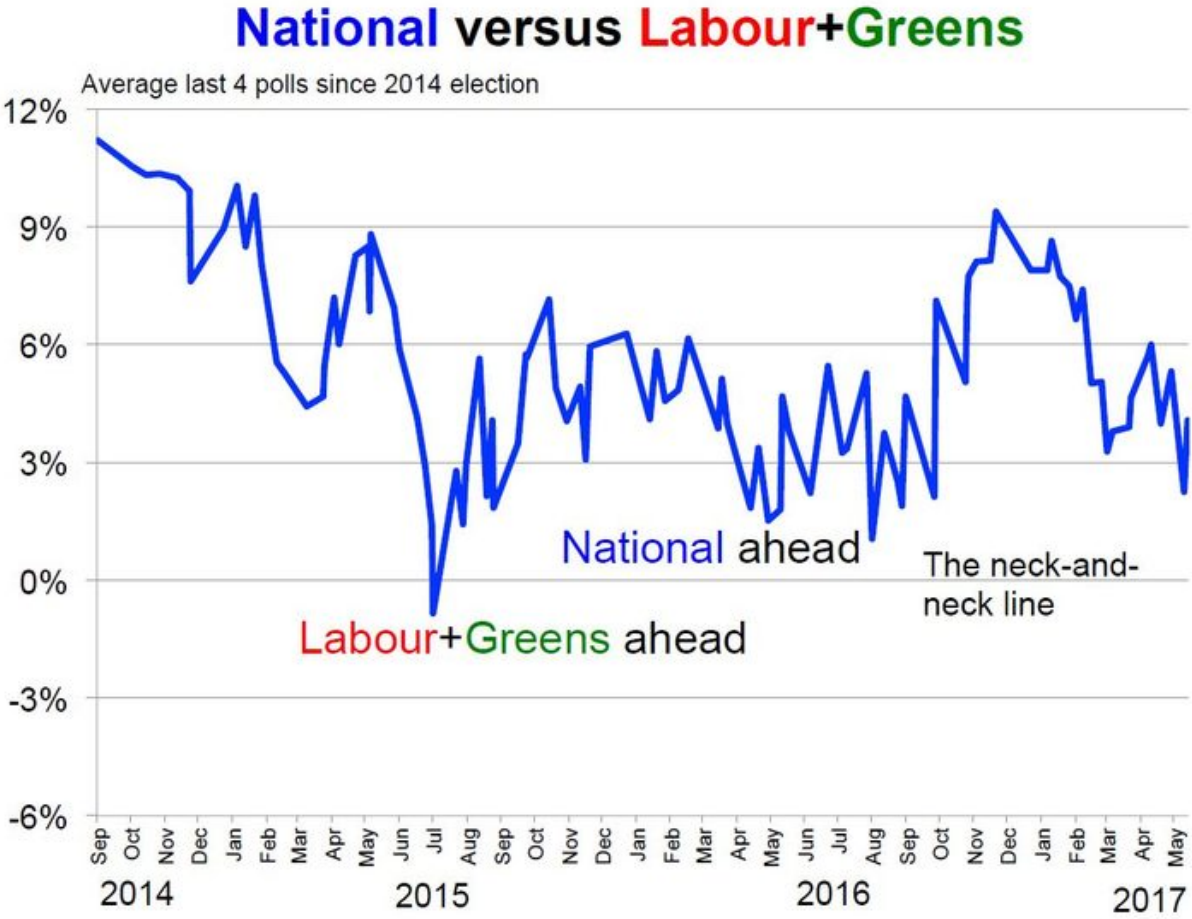
Current poll averages vs last two years

	Nat	Lab	Green	NZ1st	Maori	U.F.	ACT	Mana	Cons/ TOP
2017*	47.6	27.3	11.8	9.1	1.0	0.1	1.0	0	1.0**
2016	47.1	27.9	12.6	8.7	1.4	0.05	0.7	0.3	0.6
2015	48.5	29.7	11.3	6.8	1.2	0.05	0.6	0.2	1.0

- Remarkable stability
- All three most recent polls pre-Barclay/interns problems for National/Labour
- NZ First's 'rise' real, but overhyped?

- * = last three publicly published polls (Reid, Colmar Brunton, Roy Morgan)
- ** = TOP in 2017

Poll of polls



Last 3 polls extrapolated to govt formation

	With United Future	Without United Future	With UF, Maori win 2 electorates
National	58	58	58
Act	1	1	1
United Future	1	0	1
Maori	1	1	2
TOTAL SEATS – centre-right	61	60	62
Labour	34	34	34
Green	15	15	15
Lab-Green	49	49	49
NZ First	11	11	11
TOTAL SEATS – Lab/Gr/NZF	60	60	61
TOTAL SEATS	121 – 1 seat majority	120 – hung Parliament	122 – 2 seat majority

Implications

- Very little has changed
- Ohariu/Maori FPP performance remains critical
 - Dunne so far appears safe
 - Not clear Maori Party is making any inroads
- NZ First holds the balance of power in a hung Parliament
- Note: conventional wisdom says NZ First does better and the Greens worse on election day
 - But that doesn't change much unless NZ First pulls votes from National

Competing scandals: Barclay vs interns

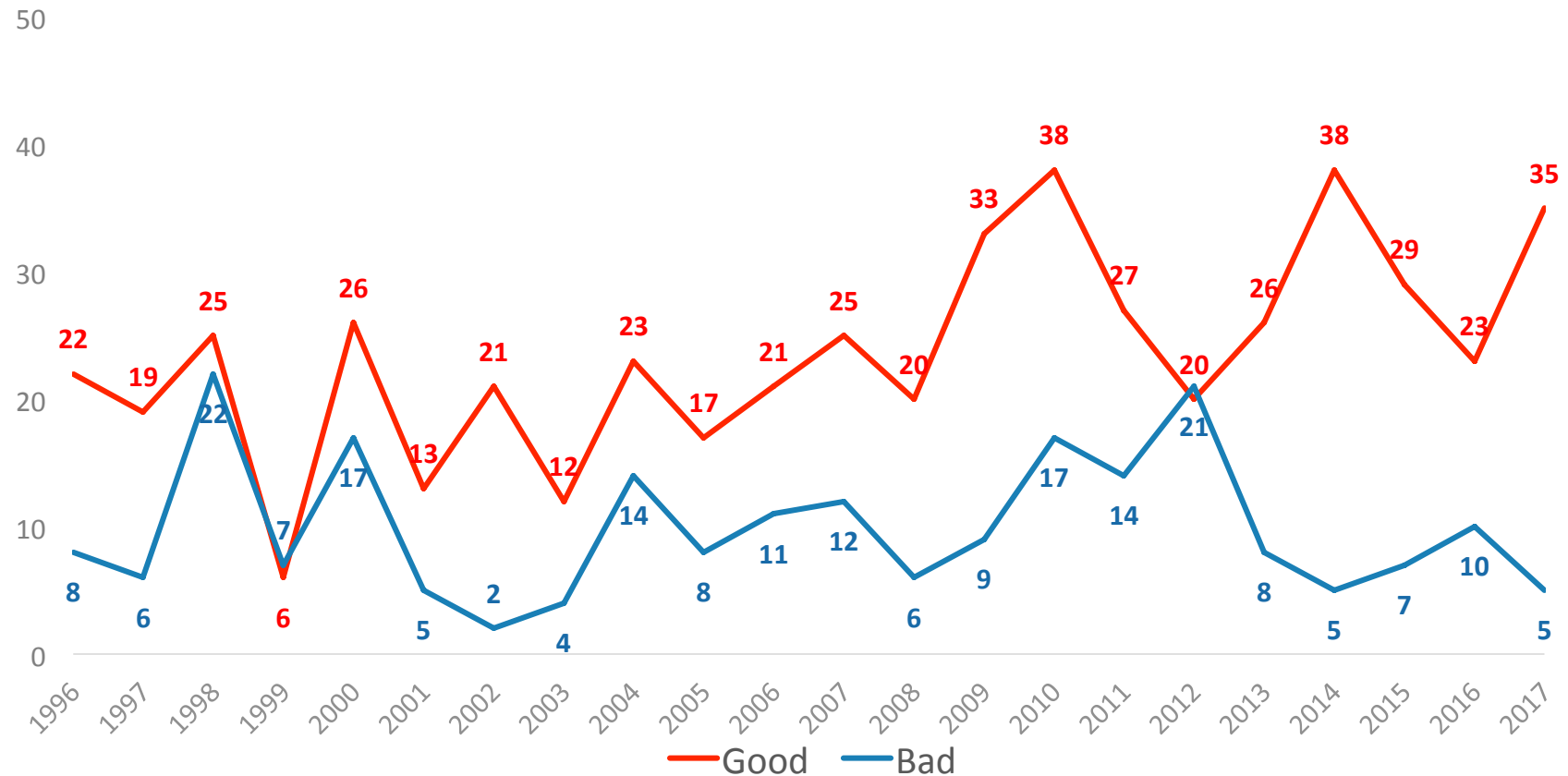
- Do they matter?
- Do they cancel one another out?
- Do they drive some voters to third parties?

- What do they tell us?
 - English does not control the party the way Key did
 - Matt McCarten's influence greatly weakened

Labour's labour policy

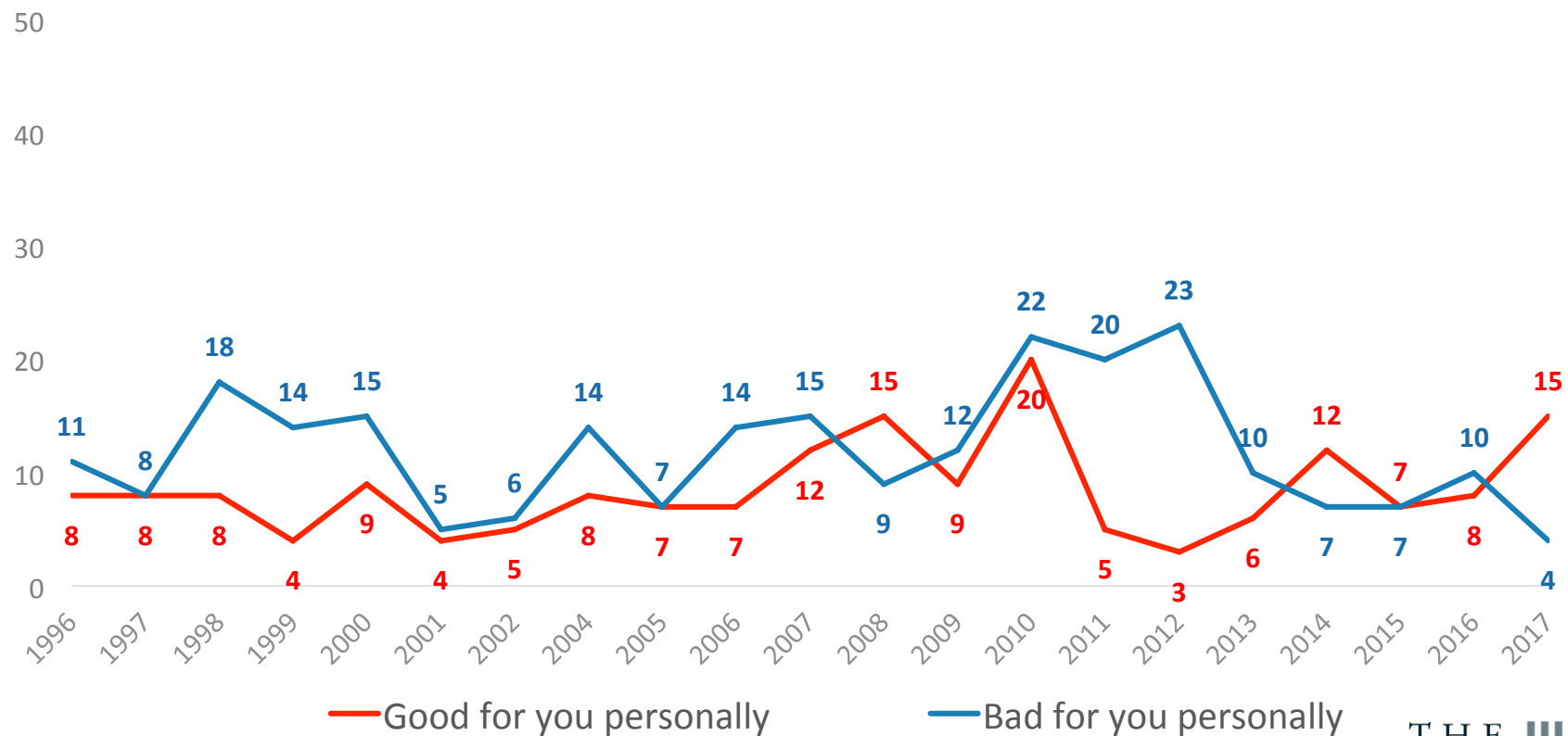
- Two key elements:
 - Unjustified dismissal appeal process added to 90 day trials
 - Fair Pay Agreements – a feint in the direction of national awards/bargaining
 - No detail offered on how this would work, esp. given low levels of union membership
- Two symbolic elements:
 - Raise minimum wage to \$16.50/hr
 - Directly affecting 2.9% of the workforce
 - Living Wage for 'core public service'
 - Most already paid more than the Living Wage

The Budget – good or bad overall?

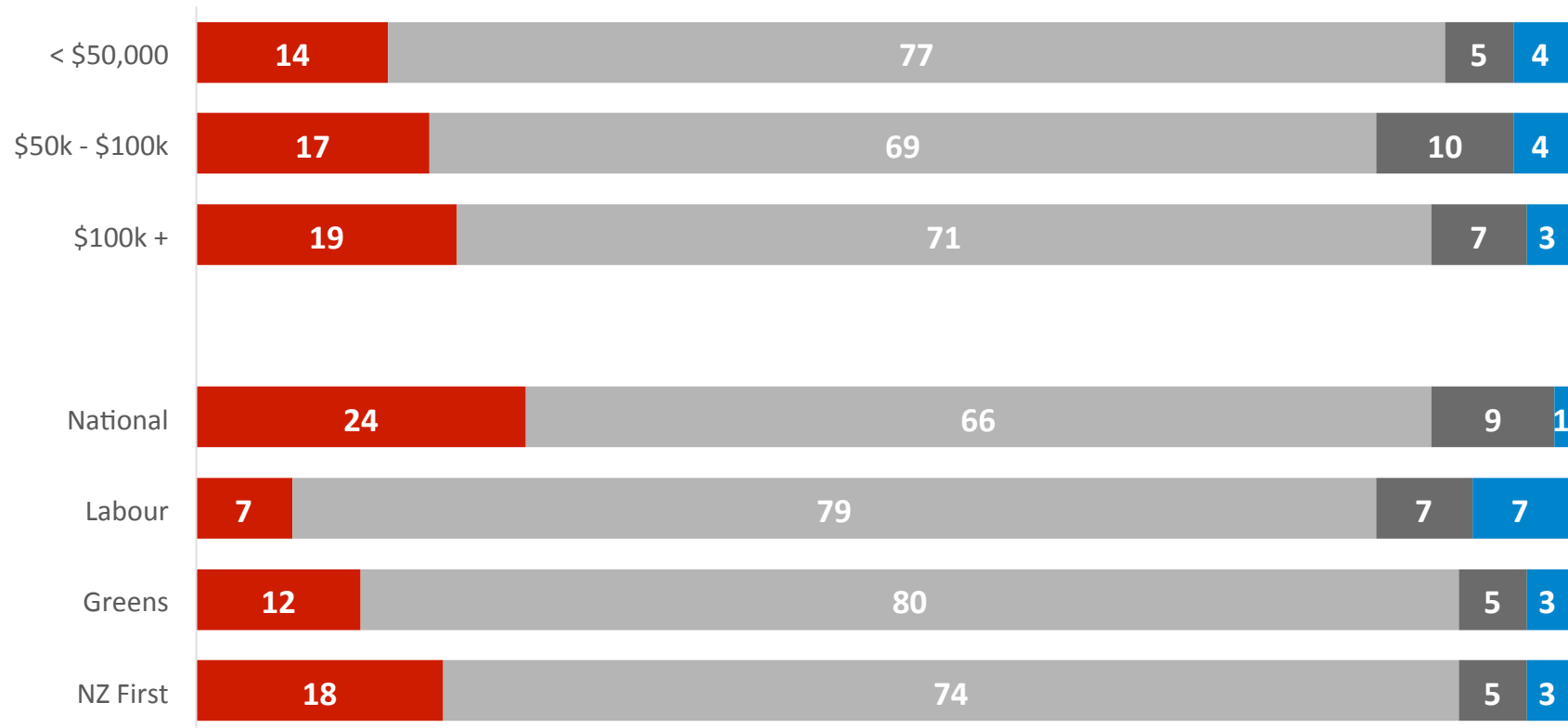


Good or bad overall?

The Budget – good for me?



The Budget – by demographic



■ Good ■ Not difference ■ Unsure ■ Bad

Election issues - immigration

Views towards immigration - all

} On a scale of 0 to 10, where 10 means you think immigration into New Zealand is an entirely positive thing, and 0 means you think immigration into New Zealand is an entirely negative thing, how would you describe your views towards immigration?



■ Negative (0-3) ■ 4 to 6 ■ Unsure ■ Positive (7-9) ■ 10 - Entirely positive

Base: all respondents (n=1000)

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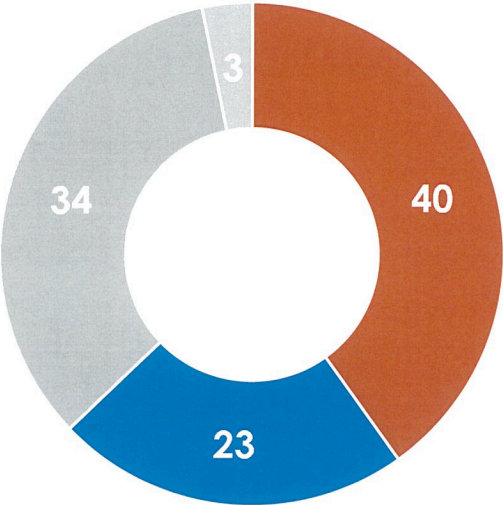
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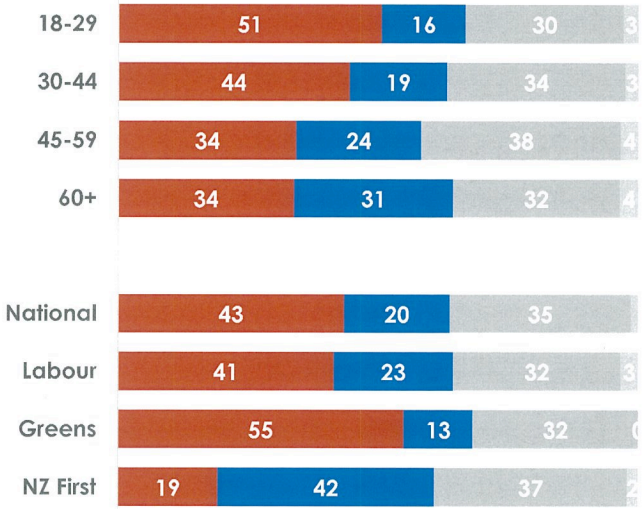
Immigration – good or bad for NZ?

Increasing immigration: better or worse for NZ?

} Overall, do you think having an increasing number of people of many different races, ethnic groups, and nationalities in our country makes New Zealand...?



■ A better place to live ■ A worse place to live
 ■ It doesn't make much difference ■ Unsure



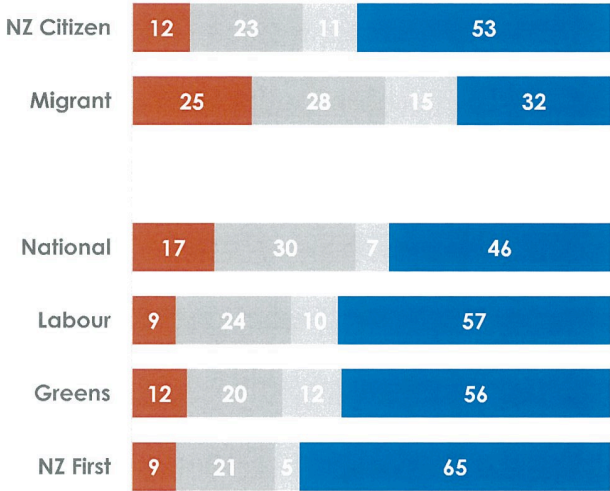
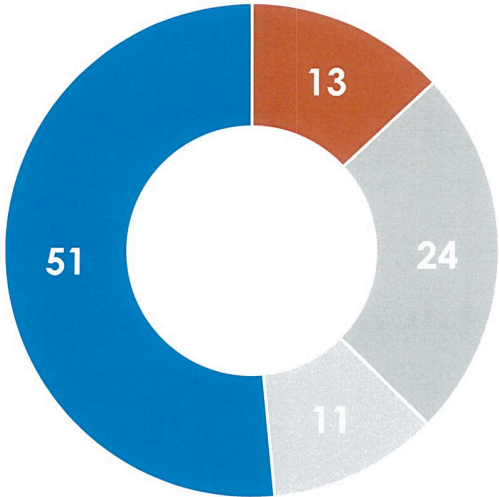
Base: all respondents (n=1000)



Immigration - engagement

Do we talk about immigration enough?

} Do you think the issue of immigration has been discussed in New Zealand too much, too little or the right amount in the last year or so?



■ Too much ■ The right amount ■ Unsure ■ Too little

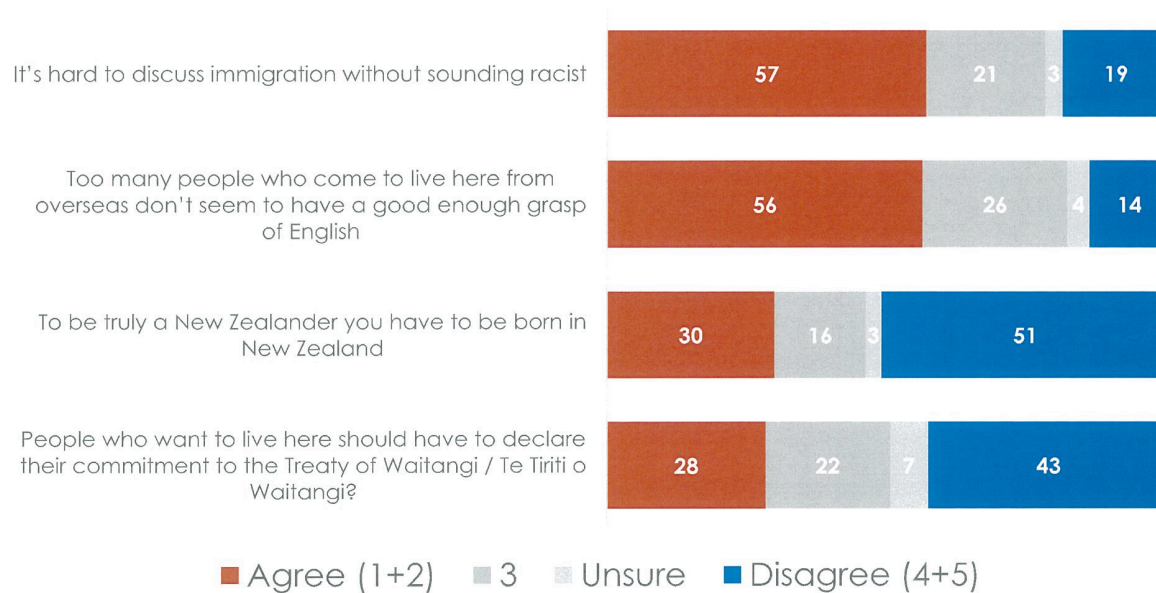
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Immigration – the button-pushers

Key attitudes on immigration

} On a 1 to 5 scale where 1 means strongly agree and 5 means strongly disagree, how much do you agree or disagree with the following statements



Base: all respondents (n=1000)

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HUGO
GROUP



Policy issues

- Infrastructure funding – package pending
- S36 reform pushed off to mid-2018
 - But ‘market studies’ permitted
 - Construction industry a likely early candidate
- Transport fuel competitiveness
 - Expecting more smoke than fire – due early next week
- Copyright law review
- Water – Labour confirms water charging
- State sector appointments – who will replace David Smol?