Roy Morgan New Zealand Electorate Profiles

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Measuring Public Opinion for over 80 Years

Tuesday, 2 May 2023

New Zealand: National/Act NZ on 44.5% are now just ahead of Labour/Greens on 42% but neither is set for a majority

Today's Roy Morgan New Zealand Poll for April 2023 shows the election is too close to call with a right-leaning potential National/ Act NZ coalition on 44.5%, down 0.5% points since March ahead of a left-leaning potential Labour/ Greens coalition on 42%, down 1.5% points.

For the potential right-leaning coalition support for National was unchanged at 32% while support for Act NZ was down 0.5% points to 12.5% - its lowest support so far this year.

In contrast, support for the governing Labour Party was down 3% points to 30% while support for their governing partners the Greens was up 1.5% points to 12% in April.

The results for April continue to show the New Zealand Election later in 2022 is on a knife-edge with the crossbench set to determine who will form New Zealand's next Government.

Maori Party are still in the box seat to determine New Zealand's next Government

The results for April suggest neither Labour/Greens nor National/Act NZ will have enough support to form a majority Government later this year and the party in the box seat to determine the next Government is the Maori Party on 4.5%, up 2.5% points on March.

Support for New Zealand First increased in April but is just short of the 5% threshold, up 1.5% points to 4.5% and not enough support to win seats in New Zealand's next Parliament.

A further 4.5% of electors support other minor parties outside Parliament, down 2% points from a month ago, including 2% (down 1.5% points) who support The Opportunities Party, 1.5% points who support Democracy NZ and 0.5% (down 0.5% points) who support the New Conservative Party.

A potential 58 seats for a National/Act NZ coalition and 56 seats for a potential Labour/Greens coalition puts the Maori Party in the box seat to determine the next New Zealand Government

If these results were repeated at this year's New Zealand Election the National/Act NZ coalition would score 58 seats, just ahead of the 56 seats for a potential Labour/Greens coalition – not enough for a majority of 61 seats for either side of politics.

The projected results show the Maori Party with 6 seats in New Zealand's next Parliament would be in the box seat to determine who New Zealand's Prime Minister after this year's election would be – either Chris Hipkins (Labour) or Christopher Luxon (National).

This latest New Zealand Roy Morgan Poll on voting intention was conducted by telephone – both landline and mobile – with a New Zealand-wide cross-section of 929 electors during April. Electors were asked: "If a New Zealand Election were held today which party would receive your party vote?" Of all electors surveyed 3.5%, down 1.5% points, did not name a party.

New Zealand Government Confidence Rating dropped 6pts to 80 in April

The Roy Morgan Government Confidence Rating dropped 6pts to 80 in April to its lowest since former Prime Minister Jacinda Ardern resigned in January.

In April 2023 a majority of 55% (up 2.5% points) of electors said New Zealand was 'heading in the wrong direction' compared to around a third, 35% (down 3.5% points), who said New Zealand was 'heading in the right direction'.

The latest <u>ANZ-Roy Morgan Consumer Confidence Rating for New Zealand was up 1.6pts to 79.3</u> and is just below the latest <u>Consumer Confidence figure in Australia of 79.8 on April 24-30, 2023.</u>

Women favour a Labour/Greens coalition whereas men favour a National/Act NZ coalition

On an overall basis women favour the current governing Labour/Greens coalition on 47% by 8.5% points ahead of a potential National/Act NZ coalition on 39%.

However, the split by age reveals younger and older women are not in alignment. Younger women aged 18-49 are the core support for the governing Labour/ Greens coalition with a majority support of 52.5% well ahead of the 29% of this age group who support a potential National/ Act NZ coalition.

In contrast, older women aged 50+ narrowly prefer a potential National/ Act NZ coalition on 47.5% compared to 41.5% who support the governing Labour/ Greens coalition – a gap of 6% points.

When it comes to men a narrow majority of 50.5% support a potential National/ Act NZ coalition compared to just over a third, 36.5%, who support the current Labour/ Greens governing coalition.

A large majority of 57.5% of older men aged 50+ support a potential National/ Act NZ coalition government compared to under a third, 31.5%, who support the governing Labour/ Greens coalition.

There is a much closer result for younger men aged 18-49 with a slim plurality of 44% who support a potential National/ Act NZ coalition government compared to 42% who support the current governing Labour/ Greens coalition.

Support for Act NZ is clearly defined by gender and is far higher amongst men at 17.5% compared to only 7% support amongst women.

Support for the Greens is higher amongst both younger women and younger men than their older counterparts. Around one-in-eight women aged 18-49 (12%) and one-in-six men aged 18-49 (16.5%) support the Greens compared to 9.5% of women aged 50+ and 8.5% of men aged 50+.

The Maori Party attracts the support of 5% of women including 9% support from women aged 18-49 and 1.5% support from women aged 50+. The Maori Party attracts the support of 3.5% of men including 5% of men aged 18-49 and 1.5% of men aged 50+.

Party vote analysis by Gender & Age

			Women				
	<u>Total</u>	<u>All</u>	<u>18-49</u>	<u>50+</u>	<u>All</u>	<u>18-49</u>	<u>50+</u>
	%	%	%	%	%	%	%
Labour	30.5	36	40.5	32	24	25.5	23
Greens	11.5	11	12	9.5	12.5	16.5	8.5
Labour/ Greens	42	47	52.5	41.5	36.5	42	31.5
National Act NZ National/ Act NZ	32 12.5 44.5	31.5 7 38.5	22 7 29	40.5 7 47.5	33 17.5 50.5	26.5 17.5 44	39 18 57
Maori Party	4.5	5	9	1.5	3.5	5	1.5
NZ First	4.5	4	2.5	6	4.5	3	6
Others	4.5	5.5	7	3.5	5	6	4
Total	100	100	100	100	100	100	100

Roy Morgan Government Confidence Rating

Right Direction	35	36	38	34	33.5	39	27
Wrong Direction	55	52	50	54	58.5	56	61.5
Government Confidence Rating	80	84	88	80	75	83	65.5
Can't say	10	12	12	12	8	5	11.5
Total	100	100	100	100	100	100	100

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

New Zealand Government Confidence Rating is lowest for older men at only 65.5 in April

The Roy Morgan New Zealand Government Confidence Rating fell for a second straight month in April, down 6pts to 80 with the largest fall amongst men and especially younger men aged 18-49.

Among women overall now a majority of 55% (up 1.5% points) say 'New Zealand is 'heading in the wrong direction', while 35% (down 2% points) say New Zealand is 'heading in the right direction' – a Government Confidence Rating of only 84 (down 0.5pts). The Government Confidence Rating for women aged 18-49 was actually up by 9pts to 88 while it was down by 7.5pts to 80 for women aged 50+.

A large majority of men, 58.5% (up 7% points) say New Zealand is 'heading in the wrong direction' while only around a third of men, 33.5% (down 7% points), say New Zealand is 'heading in the right direction' – a Government Confidence Rating of 75 (down 14pts). The Government Confidence Rating of younger men aged 18-49 was down 18.5pts to 83 while for older men aged 50+ it was down 10pts to only 65.5.

Michele Levine, CEO Roy Morgan, says the New Zealand election is up for grabs only five months before Kiwis head to the polls in October with a potential National-Act NZ coalition only slightly favoured over the governing Labour-Greens coalition:

"Today's Roy Morgan New Zealand Poll shows support for a potential National-Act NZ coalition at 44.5% (down 0.5% points) in April just ahead of a potential Labour-led Government in coalition with the Greens at 42% (down 1.5% points).

"If these results were repeated at this year's New Zealand Election National/Act NZ would hold 58 seats and Labour/Greens would hold 56 seats – leaving the Maori Party on 4.5% support (and a projected 6 seats) in the box seat to determine who would form Government.

"There is a continuing gender split when it comes to the two sides with women favouring a potential Labour-Greens coalition on 47% compared to 38.5% for National-Act NZ while a majority of men favour a potential National-Act NZ coalition on 50.5% compared to the currently governing Labour-Greens on 36.5%.

"These results show that any fifth party which can gain seats in Parliament is likely to be in the box seat to decide whether Prime Minister Chris Hipkins continues in the job or is replaced by Opposition Leader Christopher Luxon later this year.

"The Maori Party is the most likely to be in this position but New Zealand First should never be counted out. Support for New Zealand First increased 1.5% points to 4.5% in April and the party is on the verge of crossing the 5% threshold to guarantee seats in Parliament it last reached in January 2023 (5%).

"The key indicators do not favour the Labour-led Government's re-election prospects. The latest Roy Morgan Government Confidence Rating has fallen 6 points to 80. A clear majority of 55% (up 2.5% points since March) of New Zealanders say the country is 'heading in the wrong direction' and only around a third, 35%, say the country is 'heading in the right direction'.

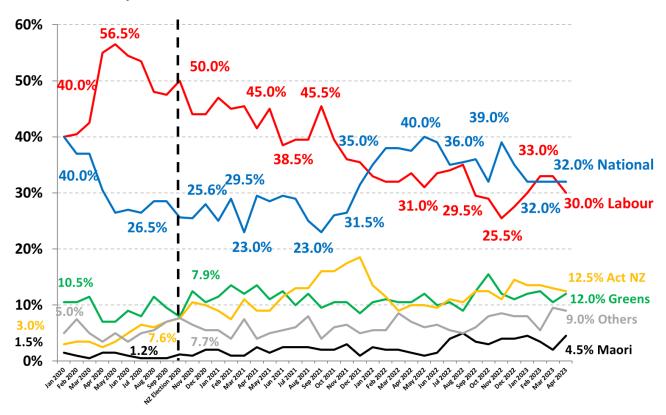
"In addition to low Government Confidence, the latest ANZ-Roy Morgan Consumer Confidence Rating is stuck at only 79.3 in April. The index has now been below 80 for three straight months and has averaged only 79.1 over the last six months – well below the low of 84.8 reached at the start of the COVID-19 pandemic.

"If both Government Confidence and Consumer Confidence remain stuck at such low levels over the next few months the chances of a re-elected Labour-led Government will diminish even further. However, the polling results for April show that as things stand this year's New Zealand election remains far too close to call just five months before polling day."

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

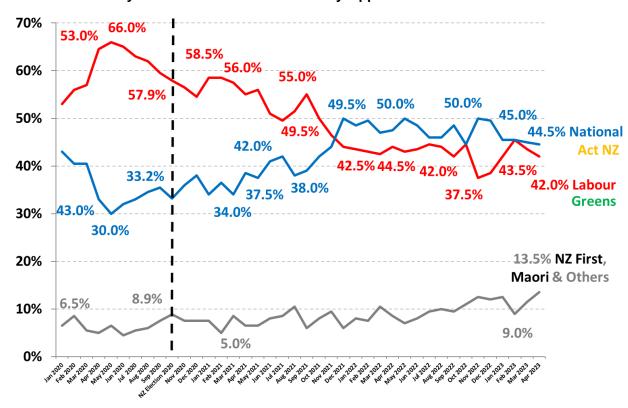
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New Zealand Party Vote: 2020-23



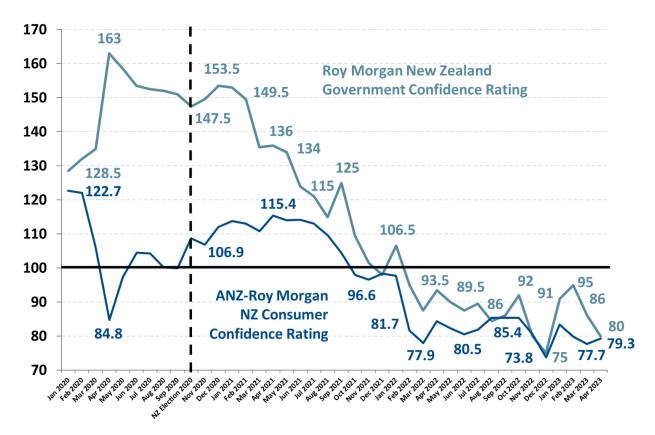
Source: Roy Morgan New Zealand Single Source. January 2020 – April 2023. **Base**: New Zealand electors aged 18+. Average interviews per month = 936.

New Zealand Party Vote: NZ Govt. v Parliamentary Opposition



Source: Roy Morgan New Zealand Single Source. January 2020 – April 2023. **Base**: New Zealand electors aged 18+. Average interviews per month = 936.

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



Source: Roy Morgan New Zealand Single Source. January 2020 – April 2023. **Base**: New Zealand electors aged 18+. Average interviews per month = 936.

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

Labour Party-led Parliamentary

<u>Government</u> <u>Opposition Parties</u>
(Labour, Greens) (National & Act NZ)

57.87 33.17

NZ Election, October 17, 2020*

ROY MORGAN NEW ZEALAND POLL

Labour wins the NZ Election and, despite securing a majority of seats in Parliament, signs a 'Cooperation Agreement' with the Greens – October 31, 2020

2021		•
January 2021	58.5	34
February 2021	58.5	36.5
March 2021	57.5	34
April 2021	55	38.5
May 2021	56	37.5
June 2021	51	41
July 2021	49.5	42
August 2021	51.5	38
September 2021	55	39
October 2021	50	42
November 2021	46.5	44
December 2021	44	50
2022		
January 2022	43.5	48.5
February 2022	43	49.5
March 2022	42.5	47
April 2022	44	47.5
May 2022	43	50
June 2022	43.5	48.5
July 2022	44.5	46
August 2022	44	46
September 2022	42	48.5
October 2022	44.5	44.5
November 2022	37.5	50
December 2022	38.5	49.5
2023		
January 2023	42	45.5
February 2023	45.5	45.5
March 2023	43.5	45
April 2023	42	44.5

^{*}At the 2020 NZ Election the Labour party secured 50.01% of the vote which was enough to govern in their own right but Labour opted to sign a 'Cooperation Agreement' with the Greens, who won 7.86% of the vote. There were three Parties elected to Parliament not in Government led by National (25.58%), Act NZ (7.59%) and the Maori Party (1.17%).

Voting Intention Summary

The following table compares the latest New Zealand Roy Morgan Polls on Voting Intention with the result from the October 17, 2020, General Election:

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

D 4 D T \ \ \ \ \ \ C T C		Green			Maori	NZ		
PARTY VOTE	<u>Labour</u>	<u>Party</u> *	<u>National</u>	ACT NZ	Party**	<u>First</u>	TOP**	<u>Other</u>
<u>ELECTIONS</u>	%	%	%	%	%	%	%	%
October 12, 1996*	28.19	10.10	33.87	6.10	n/a	13.35	n/a	8.39
November 27, 1999	38.74	5.16	30.50	7.04	n/a	4.26	n/a	14.30
July 27, 2002	41.26	7.00	20.93	7.14	n/a	10.38	n/a	13.29
September 17, 2005	41.10	5.30	39.10	1.51	2.12	5.72	n/a	5.15
November 8, 2008	33.99	6.72	44.93	3.65	2.39	4.07	n/a	4.25
November 26, 2011	27.48	11.06	47.31	1.07	1.43	6.59	n/a	5.06
September 20, 2014	25.13	10.70	47.04	0.69	1.32	8.66	n/a	6.46
September 23, 2017	36.89	6.27	44.45	0.50	1.18	7.20	2.44	1.07
October 17, 2020	50.01	7.86	25.58	7.59	1.17	2.60	1.51	3.70
ROY MORGAN POLL								
December 2020	44	10.5	28	10	2	2	2	1.5
2021				-				-
January 2021	47	11.5	25	9	2	2	1.5	2
February 2021	45	13.5	29	7.5	1	1.5	1	1.5
March 2021	45.5	12	23	11	1	2.5	2	3
April 2021	41.5	13.5	29.5	9	2.5	1	0.5	2.5
May 2021	45	11	28.5	9	1.5	2	1.5	1.5
June 2021	38.5	12.5	29.5	11.5	2.5	1.5	2	2
July 2021	39.5	10	29	13	2.5	2	3	1
August 2021	39.5	12	25	13	2.5	2.5	2	3.5
September 2021	45.5	9.5	23	16	2	1.5	1.5	1
October 2021	39.5	10.5	26	16	2	2.5	1	2.5
November 2021	36	10.5	26.5	17.5	3	2.5	1.5	2.5
December 2021	35.5	8.5	31.5	18.5	1	2	1	2
2022								
January 2022	33	10.5	35	13.5	2.5	2.5	1.5	1.5
February 2022	32	11	38	11.5	2	2	1	2.5
March 2022	32	10.5	38	9	2	4	1.5	3
April 2022	33.5	10.5	37.5	10	1.5	2.5	2	2.5
May 2022	31.5	11.5	40	10	1	3	1	2
June 2022	33.5	10	39	9.5	1.5	1.5	2	3
July 2022	34	10.5	35	11	4	1.5	2.5	1.5
August 2022	35	9	35.5	10.5	5	1.5	1	2.5
September 2022	29.5	12.5	36	12.5	3.5	1	2.5	2.5
October 2022	29	15.5	32	12.5	3	3.5	3	1.5
November 2022	25.5	12	39	11	4	3.5	2.5	2.5
December 2022	27.5	11	35	14.5	4	4	2.5	1.5
2023		• •			·	•		
January 2023								
	30	12	32	13.5	4.5	5	1.5	1.5
February 2023		12 12.5	32 32	13.5 13.5		_	_	_
February 2023 March 2023	30 33 33	12 12.5 10.5	32 32 32	13.5 13.5 13	4.5 3.5 2	5 2 3	1.5 2.5 3.5	1.5 1 3

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

Roy Morgan New Zealand Seat Predictor

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

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

SEAT COUNT ELECTIONS	<u>Labour</u> %	Green <u>Party</u> * %	National %	ACT NZ %	Maori <u>Party</u> ** %	NZ <u>First</u> %	Other %
October 12, 1996*	37	0	44	8	0	17	14*
November 27, 1999	49	7	39	9	0	5	11*
July 27, 2002	52	9	27	9	0	13	10*
September 17, 2005	50	6	48	2	4	7	4*
November 8, 2008	43	9	58	5	5	0	2*
November 26, 2011	34	14	59	1	3	8	2*
September 20, 2014	32	14	60	1	2	11	1*
September 23, 2017	46	8	56	1	0	9	0
October 17, 2020	65	10	33	10	2	0	0
ROY MORGAN SEAT PREDICTOR 2021							
June 2021	49	16	37	15	3	0	0
July 2021	50	13	37	17	3	0	0
August 2021	51	16	33	17	4	0	0
September 2021	57	12	29	20	2	0	0
October 2021	51	13	33	20	3	0	0
November 2021	46	14	34	22	4	0	0
December 2021 2022	45	11	40	23	1	0	0
January 2022	42	13	45	17	3	0	0
February 2022	41	14	48	15	2	0	0
March 2022	42	14	50	12	2	0	0
April 2022	43	13	49	13	2	0	0
May 2022	40	15	51	13	1	0	0
June 2022	43	13	50	12	2	0	0
July 2022	43	13	45	14	5	0	0
August 2022	44	12	45	13	6	0	0
September 2022	38	16	46	16	4	0	0
October 2022	38	20	42	16	4	0	0
November 2022	34	16	51	14	5	0	0
December 2022	36	14	46	19	5	0	0
2023					_	_	
January 2023	37	15	40	17	5	6	0
February 2023	42	16	41	17	4	0	0
March 2023	44	14	42	17	3	0	0
April 2023	40	16	42	16	6	0	0

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

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

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

Fifth National Government (2008-2017): 2008 NZ Election: National (58 seats) wins the NZ Election and governs with the confidence and supply of Act NZ (5 seats), the Maori Party (5 seats) and United Future (1 seat) for a total of 69 seats in the 122 seat Parliament (including 2 'overhang' seats). 2011 NZ Election: National (59 seats) wins the NZ Election and governs with the confidence and supply of Maori Party (3 seats), Act NZ (1 seat) and United Future (1 seat) for a total of 64 seats in the 121 seat Parliament (including 1 'overhang' seat). 2014 NZ Election: National (60 seats) wins the NZ Election and governs with the confidence and supply of Maori Party (2 seats), Act NZ (1 seat) and United Future (1 seat) for a total of 64 seats in the 121 seat Parliament (including 1 'overhang' seat).

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

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

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

	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
	<u>2017</u>	<u>2017</u>	<u>2020</u>	<u>2021</u>											
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Right direction	66.5	68	58	59	60.5	77	76	72	71.5	71	70.5	68.5	69.5	71.5	71.5
Wrong direction	20	18	29.5	27	25.5	14	17.5	18.5	19	19	19.5	21	20	18	18.5
Roy Morgan GCR#	146.5	150	128.5	132	135	163	158.5	153.5	152.5	152	151	147.5	149.5	153.5	153
Can't say	13.5	14	12.5	14	14	9	6.5	9.5	9.5	10	10	10.5	10.5	10.5	10
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

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

	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
	<u>2021</u>	2021	<u>2022</u>	<u>2022</u>	<u>2022</u>	<u>2022</u>	<u>2022</u>									
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Right direction	69.5	61.5	62.5	62.5	57	55.5	52.5	57	48	46	42.5	48.5	42.5	39	43	40
Wrong direction	20	26	26.5	28.5	33	34.5	37.5	32	38.5	44.5	44.5	42	47.5	51.5	49.5	50
Roy Morgan GCR#	149.5	135.5	136	134	124	121	115	125	109.5	101.5	98	106.5	95	87.5	93.5	90
Can't say	10.5	12.5	11	9	10	10	10	11	13.5	9.5	13	9.5	10	9.5	7.5	10
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

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

	The may morgan dovernment community metric metric button from a try cover,															
	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
	2022	2022	<u>2022</u>	2022	2022	<u>2022</u>	<u>2022</u>	<u>2023</u>								
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Right direction	39	40.5	37.5	37.5	42	35	32	40	42.5	38.5	35					
Wrong direction	51.5	51	53	51.5	50	55	57	49	47.5	52.5	55					
Roy Morgan GCR#	87.5	89.5	84.5	86	92	80	75	91	95	86	80					
Can't say	9.5	8.5	9.5	11	8	10	11	11	10	9	10					
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

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

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

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

Margin of Error

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

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