



LIVE EXPORTS NZ MARKET RESEARCH

CAMORRA RESEARCH REPORT

PREPARED IN CONFIDENCE FOR SPCA SEPTEMBER 2024

CAMORRA
RESEARCH LTD



Setting the scene

In 2023, Insights HQ (trading as Camorra Research) were commissioned to undertake an independent, robust and representative analysis of sentiment towards the live export industry among the New Zealand population.

The objective of the research was to provide unbiased and reliable data regarding:

- awareness and familiarity with live exports
- attitudes and perceptions towards live exports
- awareness and understanding of the current ban on live exports by sea
- perceptions towards this ban and attitudes towards overturning the ban

In September 2024, Insights HQ were commissioned to undertake a second wave of the research; to understand how awareness and perceptions may have changed and to provide a deeper view on selected areas.



Research Sample

Camorra Research are sampling experts in the market research industry.

In order to ensure representativeness of results and comparability of trend data we surveyed a large robust base of :

- 993 respondents in November 2023
- 1,005 respondents in September 2024

The my2cents sampling solution was employed which allows validation of results and is the preferred sampling source for all major NZ banks.

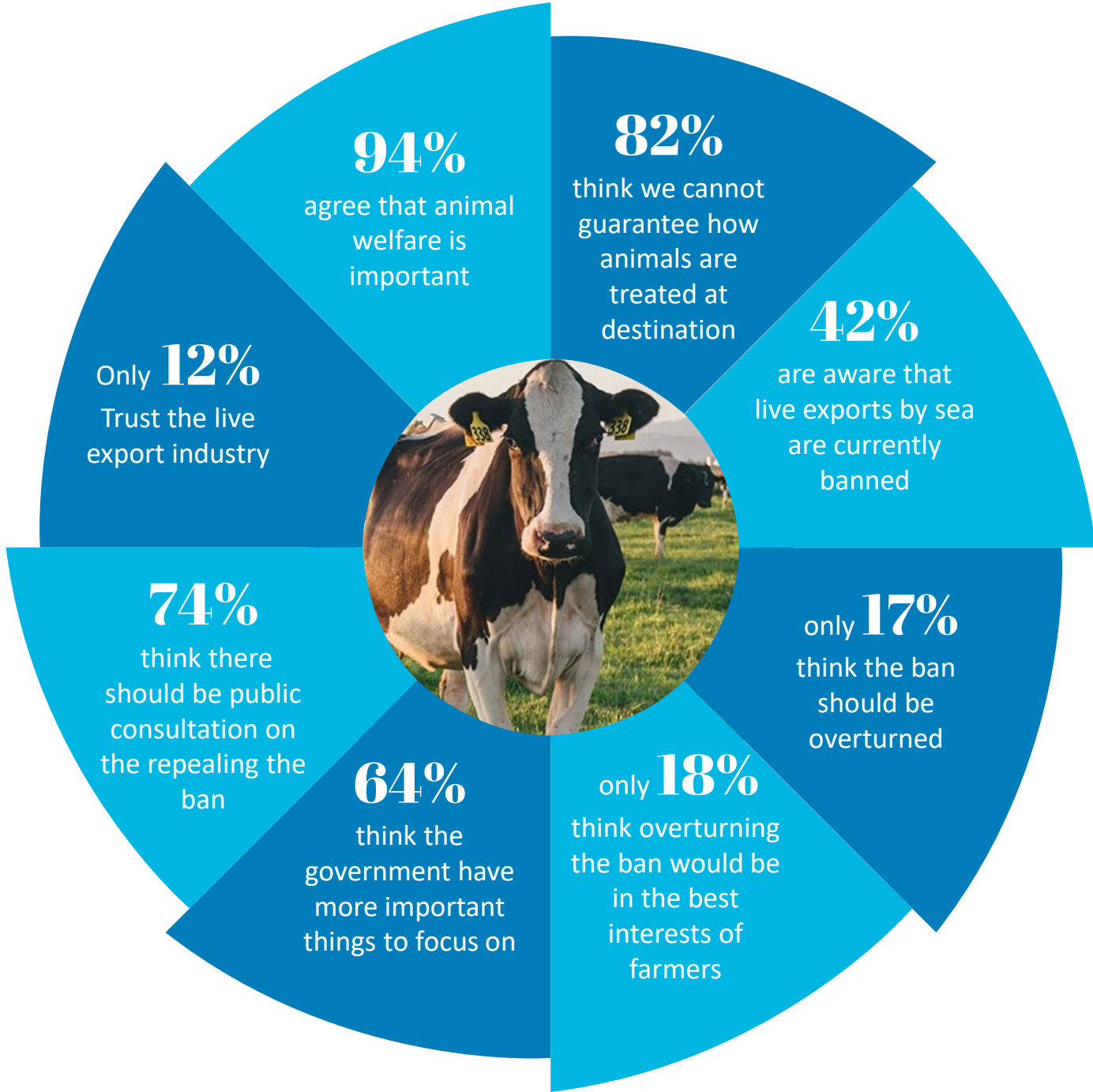
To ensure representativeness, we employed a multi cell quota design with interlocking quotas for age, gender, and region. Final data, for both waves, was weighted to NZ Census data.

Questionnaire was designed using balanced response scales.



We interviewed **1,005**
New Zealanders about the live
export industry in NZ.

We used an independent market
research agency, Insights HQ, and
spoke with a nationally
representative sample in
September 2024.

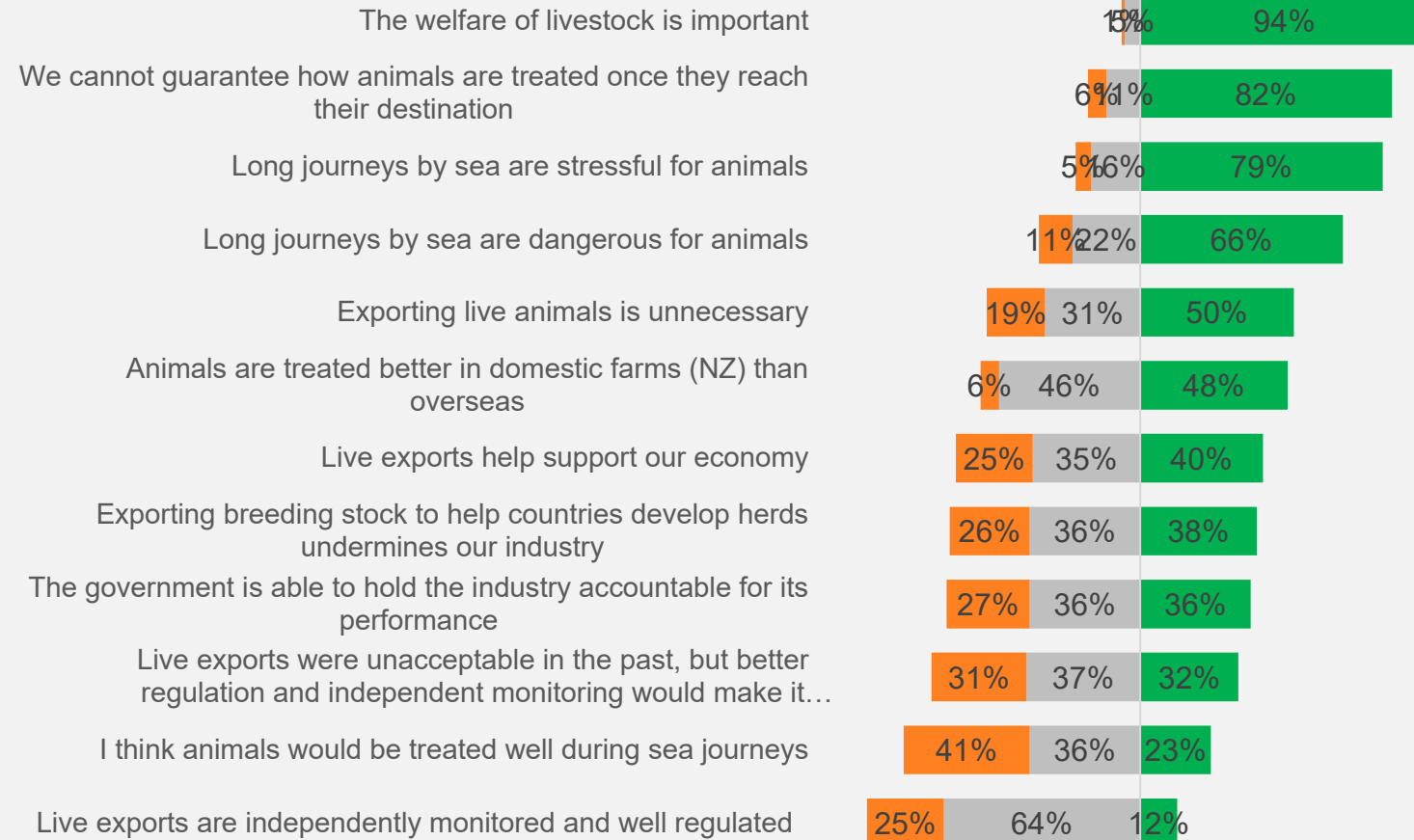


New Zealanders are near unanimous that animal welfare is important, however the vast majority do not believe we can guarantee this once animals reach their destination.

The majority also think that long journeys by sea are both stressful and dangerous.

Agreement with attitude statements

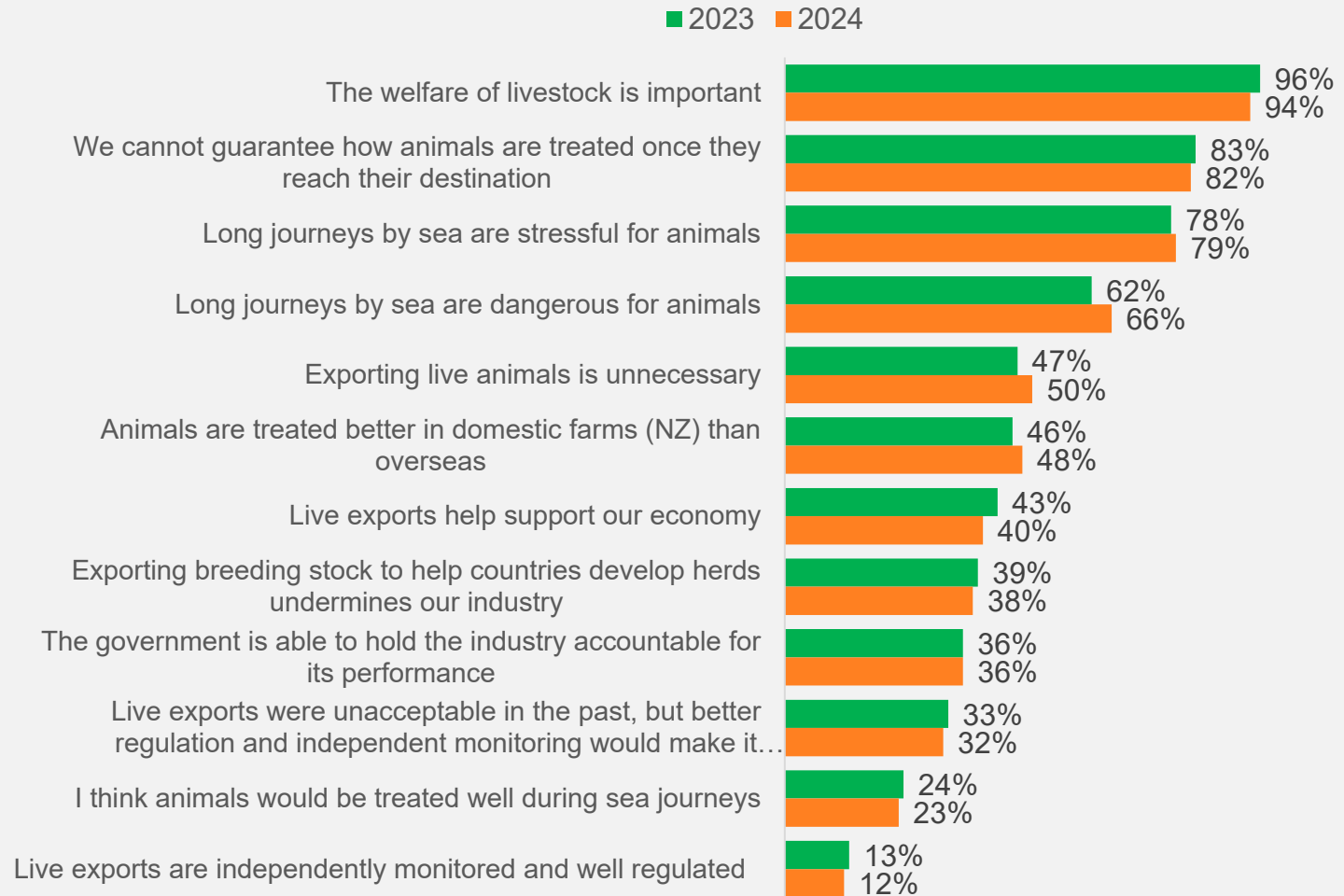
■ Don't know ■ Disagree ■ Agree



Q. First, we're interested in your opinions about what is acceptable when it comes to live export of farmed animals by sea from New Zealand. Do you agree or disagree with the following statements.
Base Total n=1,005

As we would expect, underlying attitudes towards animal welfare and live exports have changed little since the previous research conducted last year.

Agreement with attitude statements

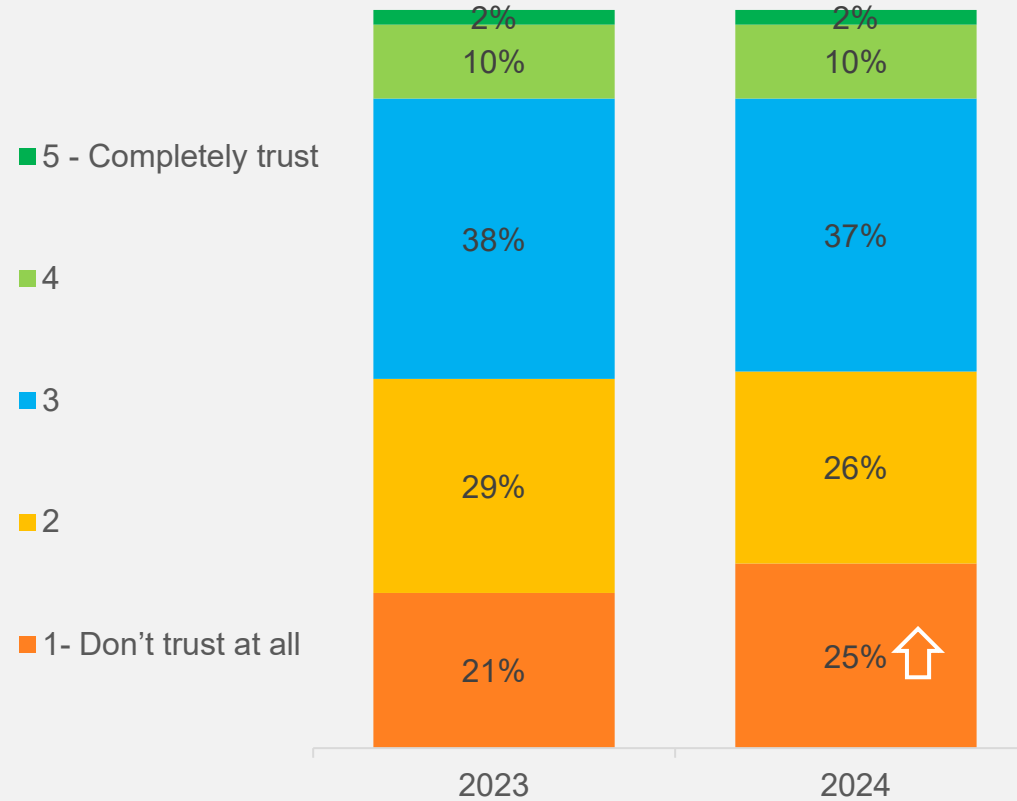


Q. First, we're interested in your opinions about what is acceptable when it comes to live export of farmed animals by sea from New Zealand. Do you agree or disagree with the following statements.
 Base 2023 n=993, 2024 n=1,005

There is very low public trust in the industry (only 12%), and this has remained unchanged since 2023.

Initial views of the live export industry

Trust in the industry



Q. On a scale of 1-5, how much do you trust the live export industry?
Base 2023 n=993, 2024 n=1,005

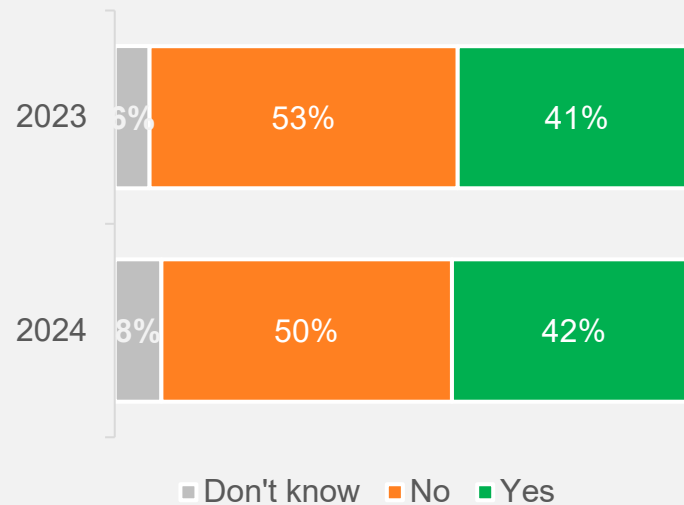
↑ Significantly higher than 2023
↓ Significantly lower than 2023

Current awareness of ban and potential overturn

Awareness of the current live export ban has not changed since 2023 and currently sits at 42%.

However, awareness of the current movement to overturn the ban has increased since last year to 37%.

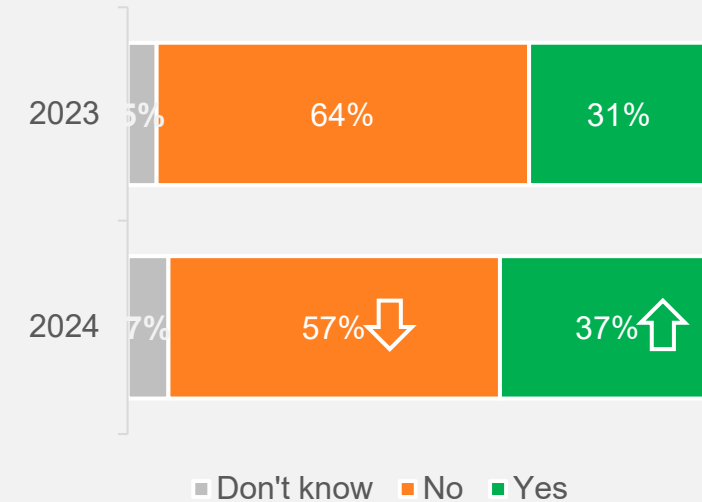
Aware of current live export ban



Q. The rules governing the export of live animals overseas reflect the high expectations New Zealanders have around animal welfare. The Animal Welfare Act 1999 was amended in 2022 to state that after 30 April 2023 no livestock (cattle, deer, goats, or sheep) may be exported from New Zealand by sea.

Before today were you aware of this ban
Base 2023 n=993, 2024 n=1,005

Aware of current movement to overturn this ban



Q. Before the ban New Zealand was only exporting these animals for breeding, not slaughter. In 2022 NZ exported 134,722 cattle, and live exports represented about 0.6% of primary sector exports.

After a 2-year phase-out period, all of the country's exports of livestock by sea stopped by the end of April 2023.

However, there is a movement to overturn this ban, to recommence live exports.

Were you aware of this?
Base 2023 n=993, 2024 n=1,005

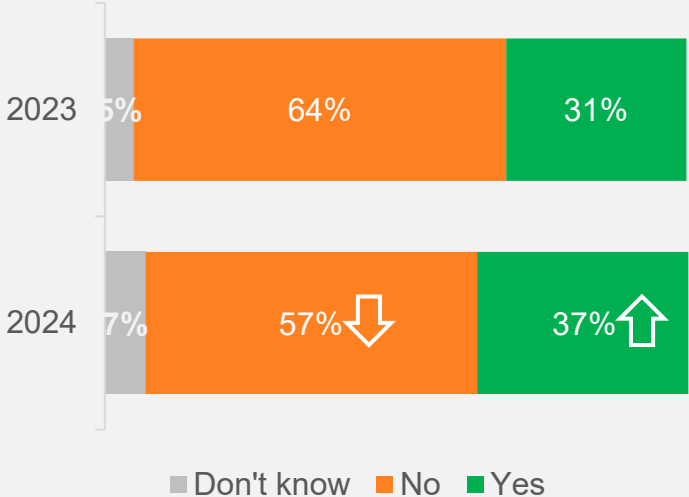
↑ Significantly higher than 2023

↓ Significantly lower than 2023

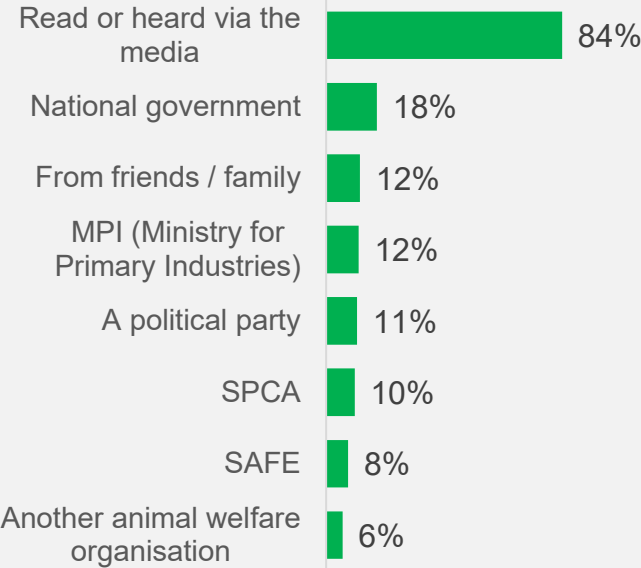
Current awareness of potential overturn

Among the 37% who are aware of the movement to overturn the ban, the most common source of awareness is the media.

Aware of current movement to overturn this ban



Source of awareness



Q. Before the ban New Zealand was only exporting these animals for breeding, not slaughter. In 2022 NZ exported 134,722 cattle, and live exports represented about 0.6% of primary sector exports.

After a 2-year phase-out period, all of the country's exports of livestock by sea stopped by the end of April 2023.

However, there is a movement to overturn this ban, to recommence live exports.

Were you aware of this?
Base 2023 n=993, 2024 n=1,005

Q. How have you heard about the movement to overturn the ban on live exports?
Base 2024 n=1,005

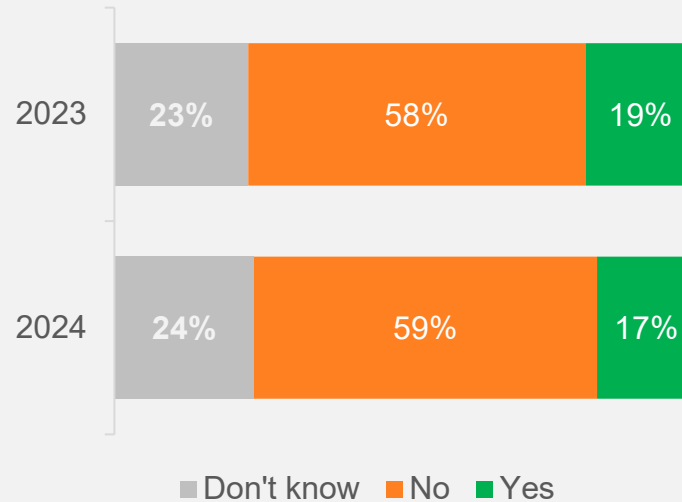
↑ Significantly higher than 2023
↓ Significantly lower than 2023

Reaction to potential overturn of live export ban

The majority of New Zealanders do not think the ban should be overturned, and over half think that overturning the ban would have a negative impact on our reputation.

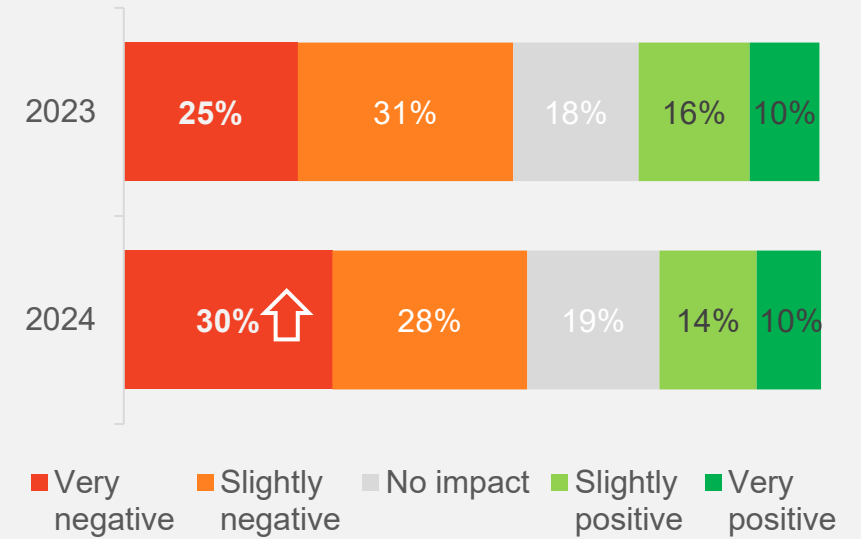
There are signs of growing negativity towards live exports; a slight decrease in the % who think the ban should be overturned, and an increase in the proportion who think doing so would have a very negative impact on New Zealand's reputation.

Do you think the ban should be overturned



Q. Do you think the ban on live exports should be overturned?
Base 2023 n=993, 2024 n=1,005

Impact on New Zealand's reputation

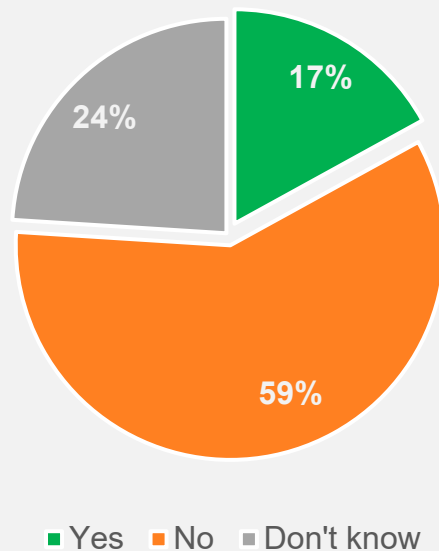


Q. New Zealand was the first country to ban live exports for both slaughter and breeding. What impact do you think overturning the ban would have on NZ's reputation?
Base 2023 n=993, 2024 n=1,005

↑ Significantly higher than 2023
↓ Significantly lower than 2023

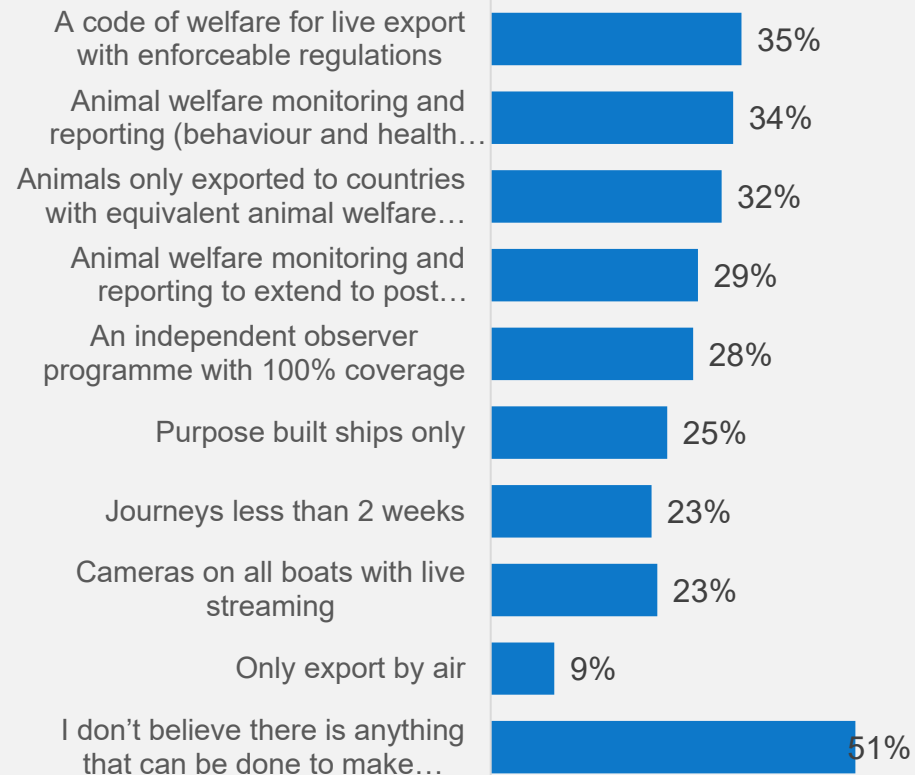
Reaction to potential overturn of live export ban

Do you think the ban should be overturned



Q. Do you think the ban on live exports should be overturned?
Base 2024 n=1,005

Acceptability of potential safeguards



Q. In your opinion, is there anything the government could realistically do that would make overturning the ban acceptable?
Base 2024; all who responded 'no' or 'don't know' to whether they think the ban should be overturned n=845

Only 17% think the ban should be overturned.

Among the rest, there is acceptance of some safeguards to make overturning the ban acceptable.

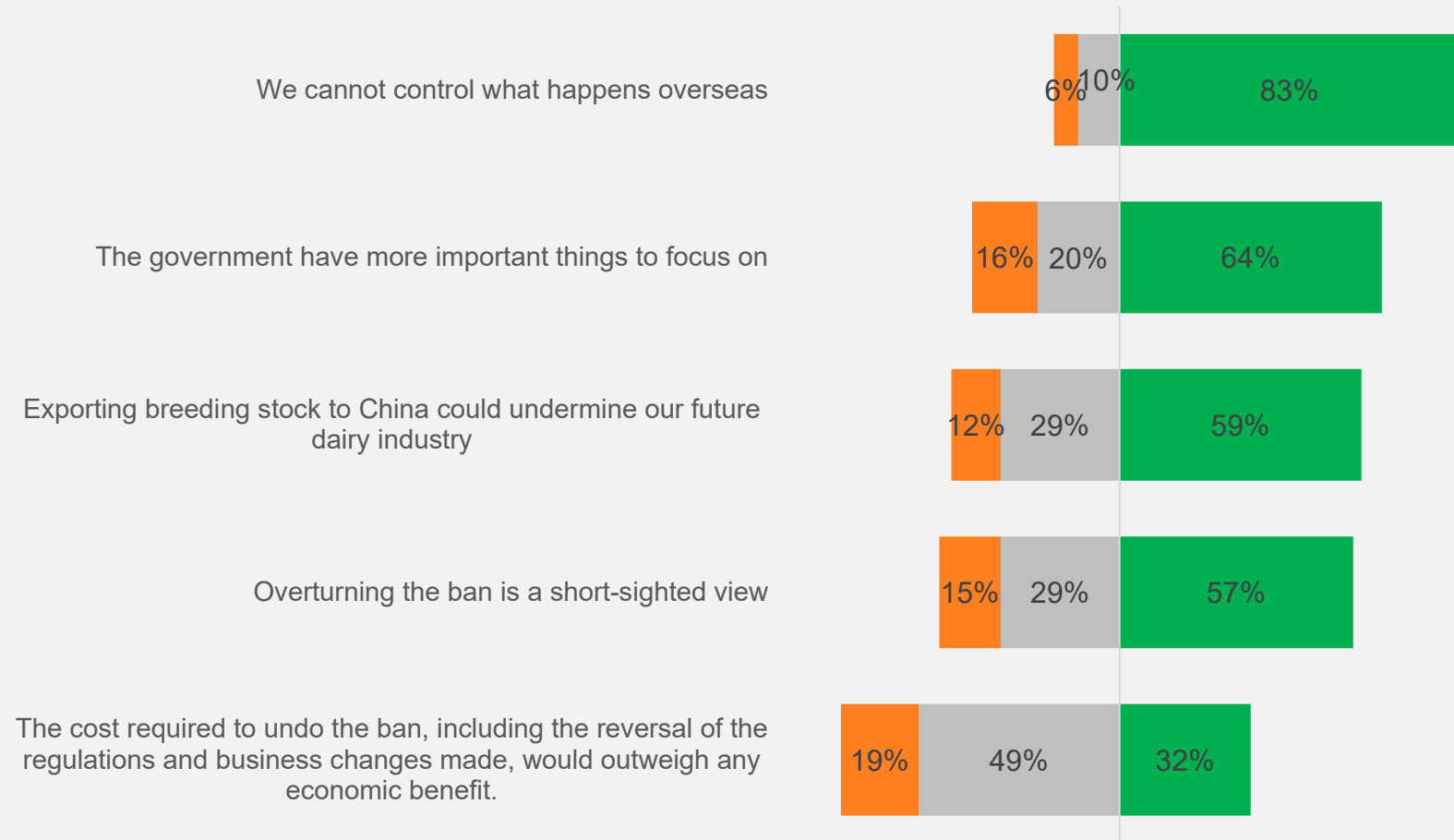
However, half do not think there is anything that could make it acceptable.

The majority of New Zealanders agree that we cannot control what happens overseas, we can therefore believe there would be very low credibility for any practices that purport to do so.

Two thirds also feel there are more important things for the government to focus on.

Agreement with attitude statements regarding overturning the ban

■ Don't know ■ Disagree ■ Agree



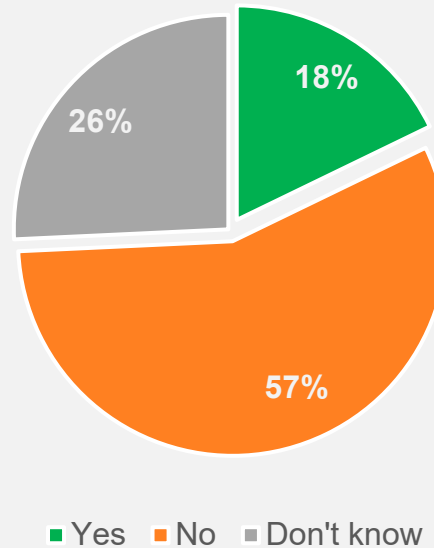
*Q. In previous research New Zealanders have said the following about overturning the ban on live export..
Do you agree or disagree with the following statements.
Base Total n=1,005*

Reaction to potential overturn of live export ban

Only 18% think repealing the ban would be in the best interests of farmers.

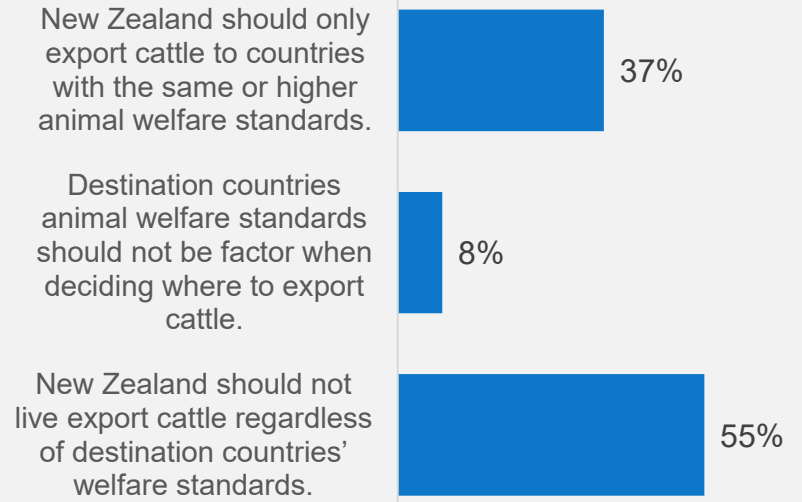
The vast majority of New Zealanders think we should only export to countries with matching or higher welfare standards, meaning China would not be an acceptable destination country for 92% of New Zealanders.

Is repealing the ban in the best interests of farmers?



Q. In previous research 56% of farmers supported a ban on live export. Do you believe that repealing the ban is in the best interests of the NZ farming sector?
Base 2024 n=1,005

Perceptions re exporting to destination countries



Q. Before the ban, New Zealand mainly exported cattle to China. World Animal Protection provides country scores based on their animal welfare legislation. Scores range from A to G, with A representing the highest score and G identifying those countries with most room for improvement. New Zealand's has been scored 'C' in animal welfare, whereas China is scored as 'E'.

With this in mind, do you think...
Base 2024 n=1,005

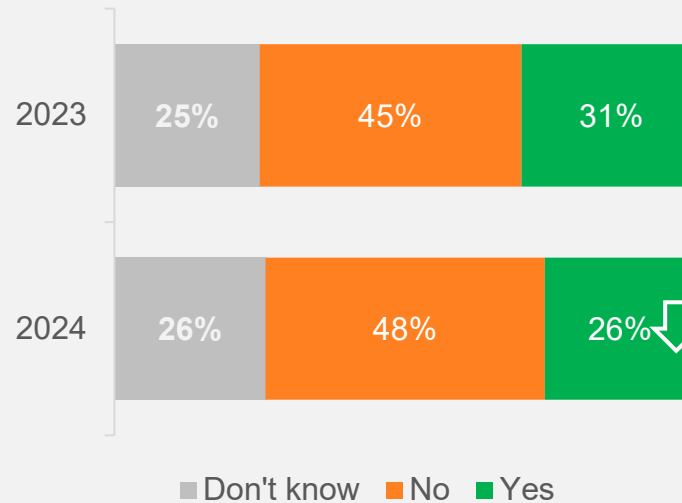
Reaction to potential overturn of live export ban

Support for repealing the ban increases slightly to 26% if the government introduced stricter animal welfare rules.

Unfortunately, the majority of New Zealanders (60%) do not think the NZ government would be able to enforce these stricter welfare rules at sea or at destination.

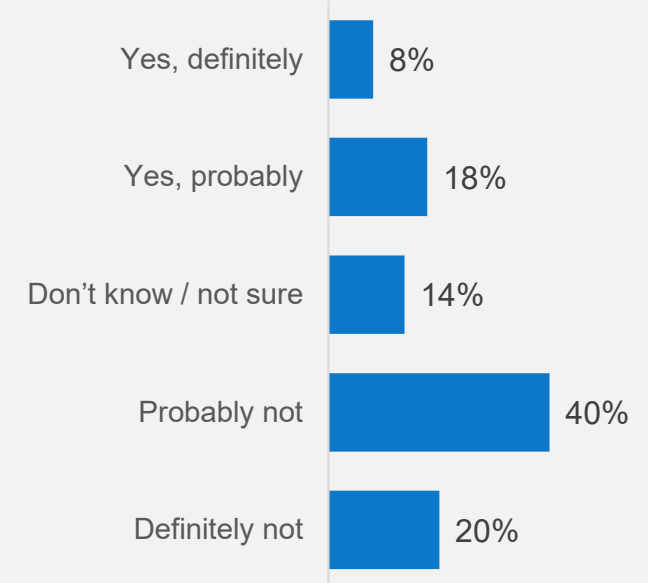
Support for repealing the ban under the context of stricter welfare rules has also declined since last year.

Support repealing ban with stricter welfare rules



Q. Would you support overturning the ban on live exports if the government introduced stricter animal welfare rules?
Base 2024 n=1,005

Perceived credibility of enforcing welfare rules



Q. Do you think the NZ government would be able to enforce stricter animal welfare rules on ships at sea and at the destination?
Base 2024 n=1,005

↑ Significantly higher than 2023

↓ Significantly lower than 2023

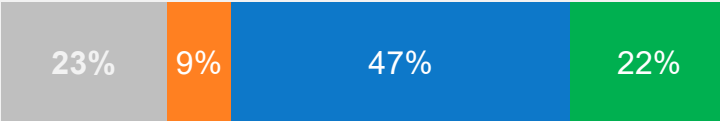
Perceptions of public consultation

Should the public be consulted



■ Don't know ■ No ■ Yes

Timing; think public consultation should be...



■ Don't know ■ Shorter than 9 weeks ■ 9 weeks ■ Longer than 9 weeks

Credibility of public consultation



Three quarters believe the public should be given the opportunity to have a say on draft legislation to repeal the ban.

There is cynicism among the public, with over half (59%) thinking it sounds like the decision has already been made.

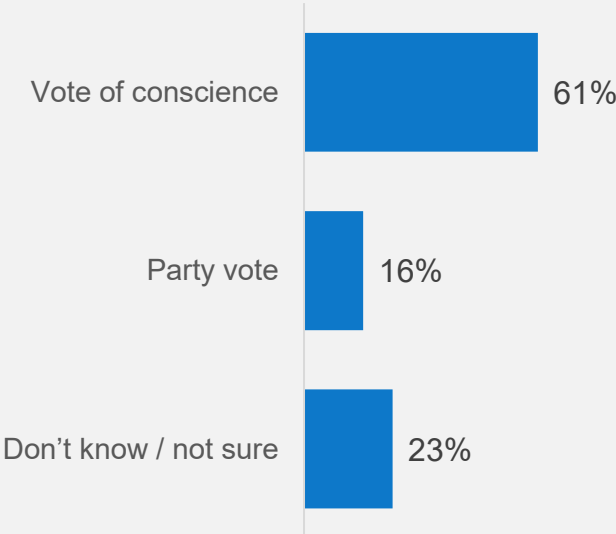
Q. Do you believe the public should be given the opportunity to have a say on draft legislation to repeal the ban?
 Q. Public consultation on the initial legislation banning live export ran over a nine-week period.
 Do you think public consultation on legislation to repeal this ban should be:
 Q. The Minister has said that he intends to introduce legislation to repeal the live export ban to cabinet in early 2025.
 What does this make you think about the public consultation
 Base 2024 n=1,005

Perceptions of public consultation

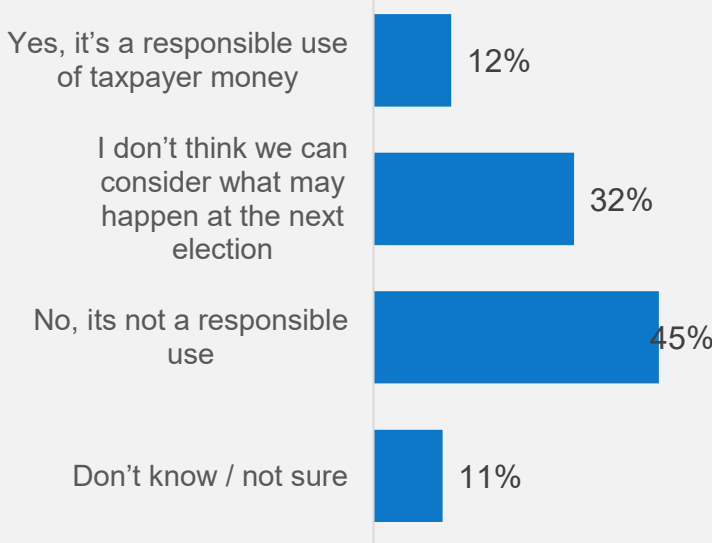
61% believe it should be decided by a vote of conscience.

In the context of Labour and Green Party committing to reinstate the ban; almost half (45%) of New Zealanders think repealing the ban represents an irresponsible use of taxpayer money.

Vote of conscience





Responsible use of taxpayer money



Q. Do you believe New Zealand's coalition government's plan to repeal the ban on live export should be decided by a vote of conscience, where MPs vote based on their personal beliefs, or by a party vote, where MPs follow their party's official stance? Labour and Green Party have publicly committed to reinstating the ban when they are next elected into government. Do you believe it is a responsible use of taxpayer money to repeal the live export ban, assuming that it will be reinstated if Labour is re-elected in the future?
Base 2024 n=1,005

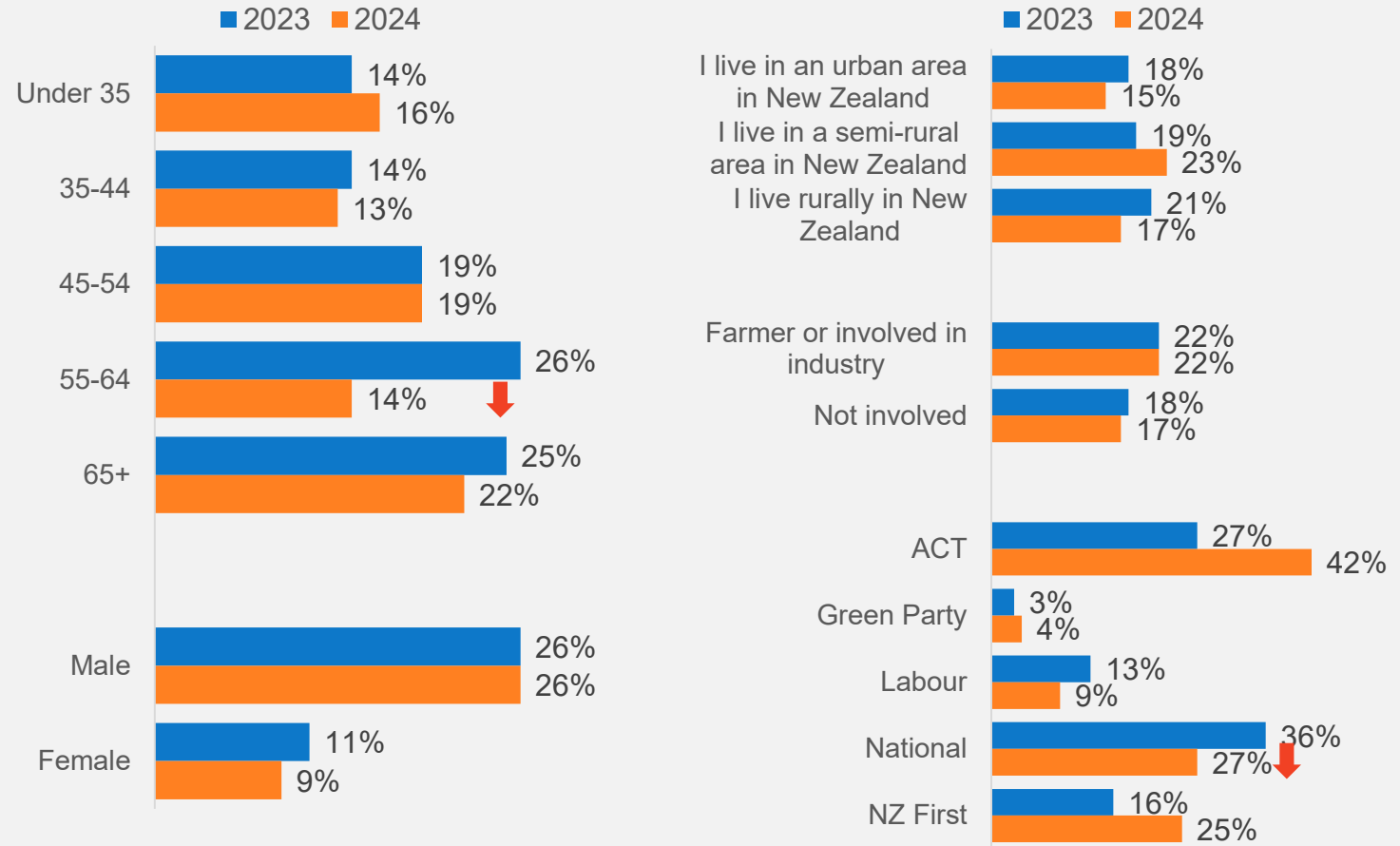
In 2023 we saw age and gender skews in support of overturning the ban on live exports, while the gender skews remain there is less of an age skew.

The largest support remains among National and ACT, but we see a decline in support among National voters.

 Significantly higher than 2023
 Significantly lower than 2023

Do you think the ban should be overturned

% responding "Yes"



Q. Do you think the ban on live exports should be overturned?
 Base 2023 n=993, 2024 n=1,005

Many New Zealanders think that overturning the ban would not only make us look indecisive but also damage New Zealand's reputation for animal welfare.

Since 2023 there has been a significant decrease in the number of New Zealanders who think it provides farmers with another revenue source.

↑ Significantly higher than 2023
↓ Significantly lower than 2023

Impacts of overturning the ban on live exports





Q. What other impacts, do you think overturning the ban on live exports would have?
Base 2023 n=993, 2024 n=1,005

When prompted, New Zealanders can see both positives and negatives to the live export industry, however they are significantly more likely to think there are negatives, mainly the danger of death and injury, stressful to animals and that our standards cannot be enforced at destination.

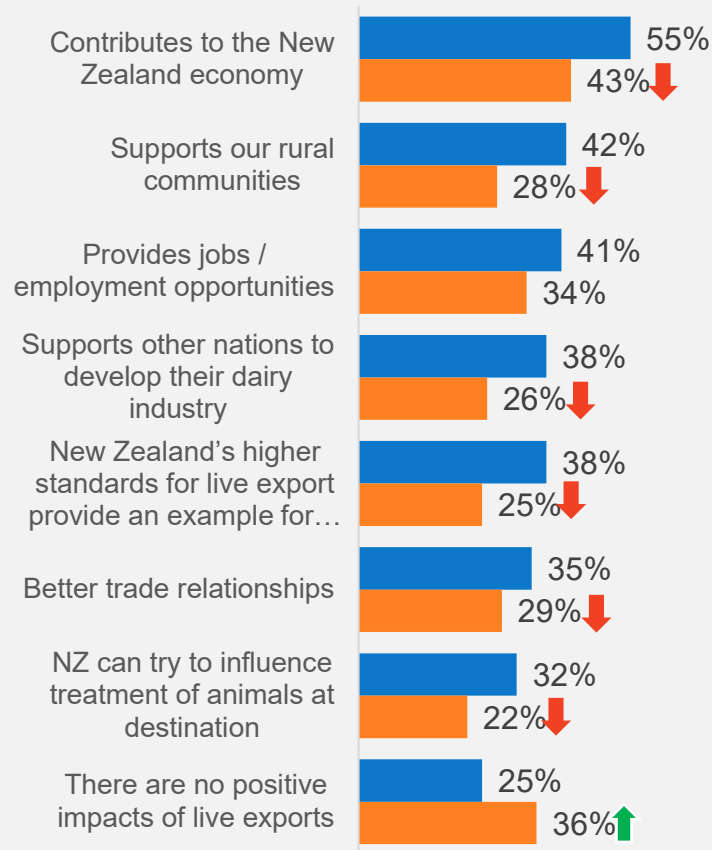
Only 5% think there are no negative impacts of live exports.

Since 2023 we have seen a significant increase in the proportion who think there are no positive impacts of live exports.

 Significantly higher than 2023
 Significantly lower than 2023

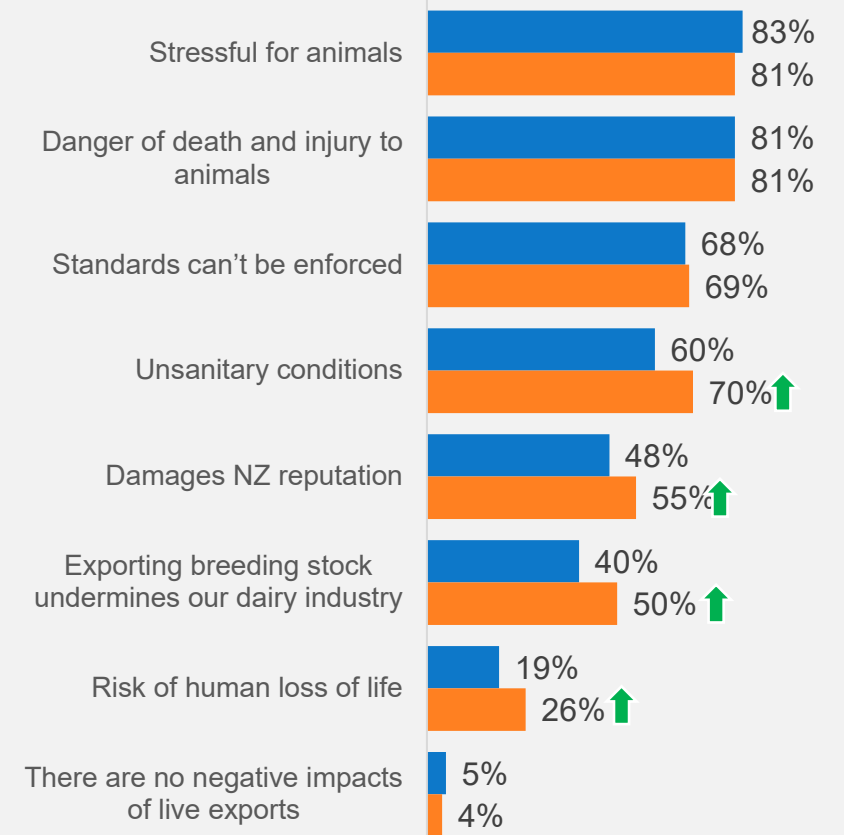
Pros and cons to overturning the ban on live exports

Positives



Q. What would you say, if any, are the positive impacts of live animal exports from New Zealand?
 Base 2023 n=993, 2024 n=1,005



Negatives



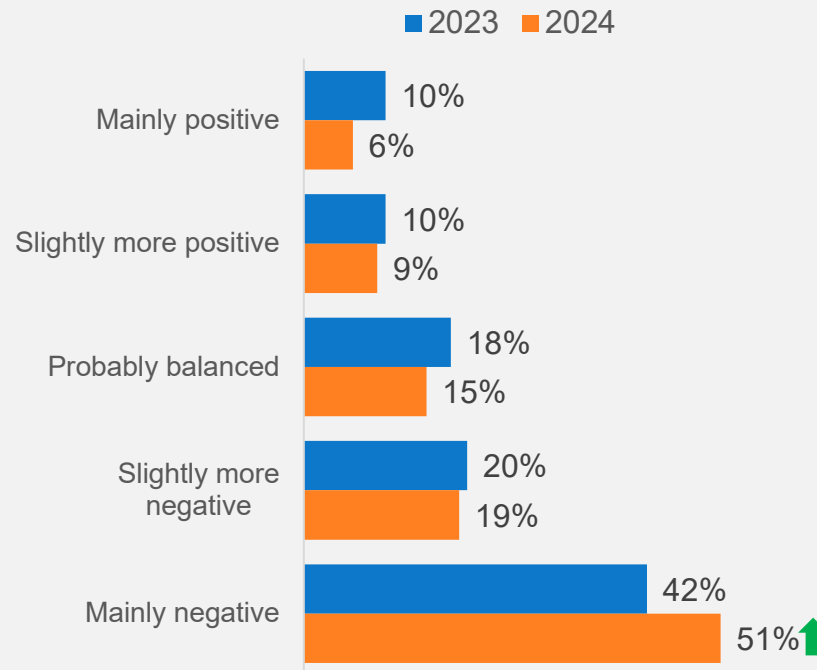
Q. And what would you say, if any are negative impacts of live animal exports from New Zealand?
 Base 2023 n=993, 2024 n=1,005

The majority, 70% think that there are more negative aspects to the live export industry, and this perception has increased since last year.

Over two thirds (65%) now agree that overturning the ban is the wrong thing to do.

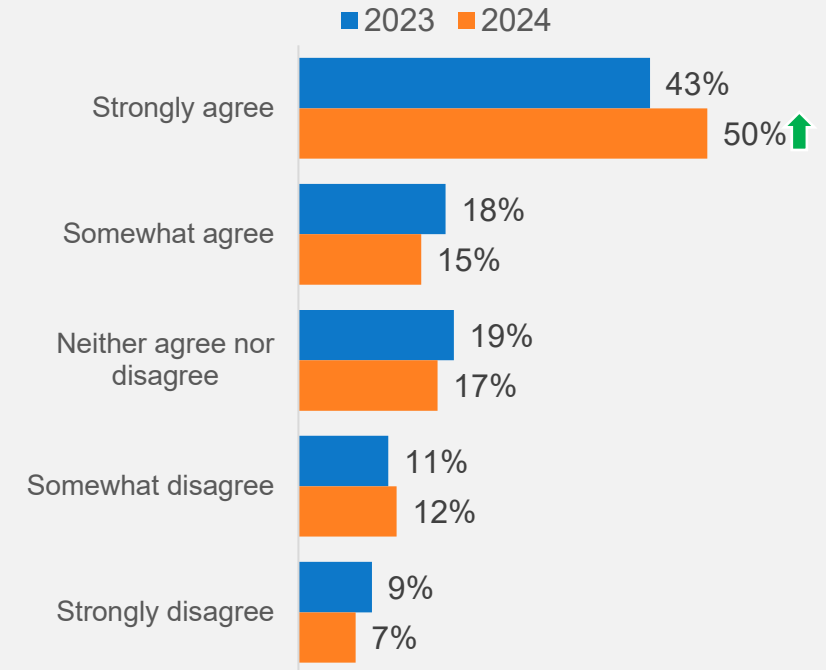
 Significantly higher than 2023
 Significantly lower than 2023

Are there more positive or negative aspects to the live export industry



Q. On balance, do you think there are more positive or negative aspects?
 Base 2023 n=993, 2024 n=1,005

Agreement that overturning the ban is the wrong thing to do



Q. Do you disagree or agree with the following statement?
 Overturning the ban on live exports is the wrong thing to do
 Base 2023 n=993, 2024 n=1,005

IN SUMMARY

INDUSTRY PERCEPTIONS ARE LOW

New Zealanders are near unanimous that animal welfare is important, however there is very low public trust in the live export industry (only 12%).

The vast majority do not believe we can guarantee animal welfare once animals reach their destination, therefore we see little credibility in any rules and practices which intend to do this.

The vast majority think we should only export to countries with matching or higher welfare standards, meaning China would not be an acceptable destination country for 92% of New Zealanders.

IN SUMMARY

AWARENESS UNCHANGED BUT GROWING NEGATIVITY

Awareness of the current live export ban has not changed since 2023 and currently sits at 42%. However, awareness of the current movement to overturn the ban has increased since last year to 37%, driven mainly by the media.

There are signs of growing negativity towards live exports;

- 70% now think there are more negative aspects to the industry (an increase from 62% in 2023).
 - a slight decrease in the % who think the ban should be overturned.
- an increase in the proportion who think doing so would have a very negative impact on New Zealand's reputation.

Only 17% think the ban should be overturned, and just 18% think repealing the ban would be in the best interests of farmers.

IN SUMMARY

THERE APPEARS TO BE SOME CYNICISM TO THE POLITICS OF OVERTURNING THE BAN

There is much cynicism among the public, with over half (59%) thinking it sounds like the decision has already been made, while two thirds also feel there are more important things for the government to focus on.

In the context of Labour and Green Party committing to reinstate the ban; almost half (45%) of New Zealanders think repealing the ban represents an irresponsible use of taxpayer money.

Three quarters believe the public should be given the opportunity to have a say on draft legislation to repeal the ban and 61% believe overturning the ban should be decided by a vote of conscience.



THANK YOU



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