



COMMERCIAL GREYHOUND RACING NZ MARKET ANALYSIS

CAMORRA RESEARCH REPORT
PREPARED IN CONFIDENCE FOR SPCA OCTOBER 2022

The Camorra Research Ltd logo is a blue upward-pointing arrow shape containing the text "CAMORRA" in a large, bold, white, sans-serif font, with "RESEARCH LTD" in a smaller, white, sans-serif font below it.

CAMORRA
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Setting the scene

Camorra Research were commissioned to undertake an independent, robust and representative analysis of sentiment towards commercial greyhound racing among the New Zealand population.

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

- Current awareness and familiarity with commercial greyhound racing
- Understand current attitudes and perceptions
- Identify level of current support or opposition
- Provide context in terms of current, relevant behaviours



Research Sample

Camorra Research are sampling experts in the market research industry

In order to ensure representative of results we surveyed a large robust base of 1,327 respondents.

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

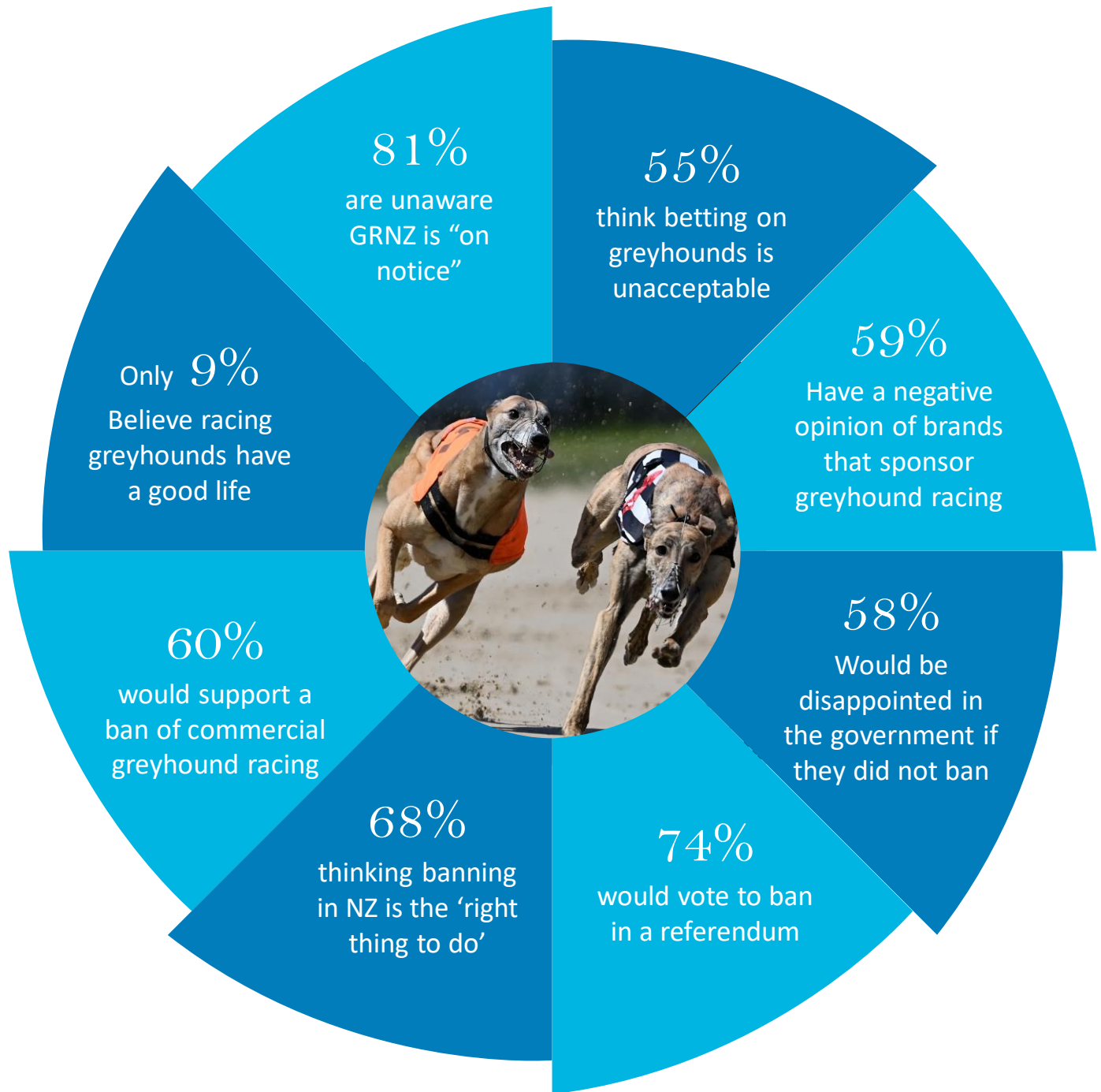
To ensure representativeness, we employed a multi cell quota design with interlocking quotas for age, gender, and region. Final data was weighted to NZ Census data.

Questionnaire was designed using balanced response scales.

SPCA used an independent market research agency, Camorra Research, who spoke with a nationally representative sample.

1,327

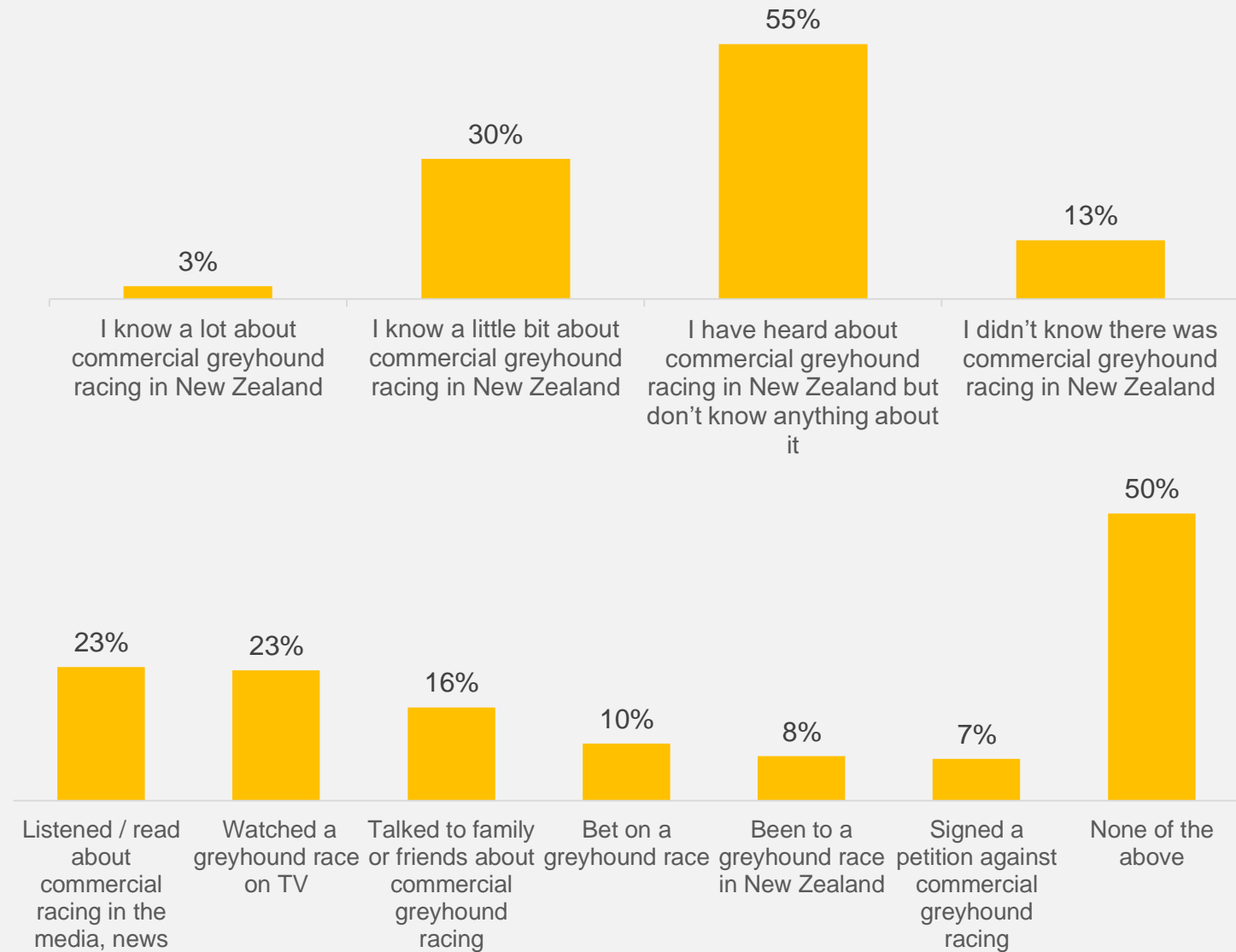
New Zealanders were interviewed about Commercial Greyhound Racing in NZ.



FAMILIARITY WITH COMMERCIAL GREYHOUND RACING

Over two thirds are either unaware (13%) or are aware but don't know anything about commercial greyhound racing in New Zealand

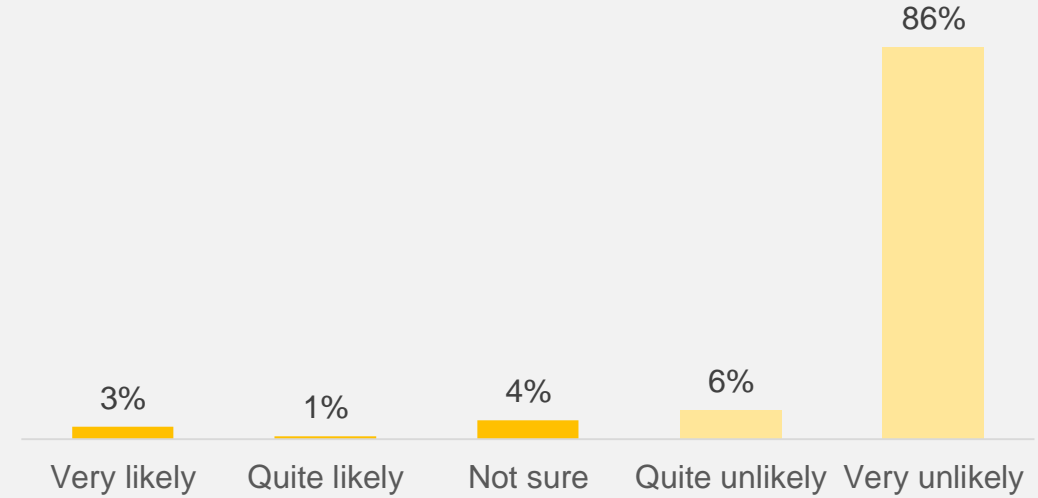
- Half of New Zealanders have not had any participation with commercial greyhound racing.
- 23% have listened to or read something in the media or news.
- 23% have watched a greyhound race on TV.
- 10% have bet on a greyhound race at least once.



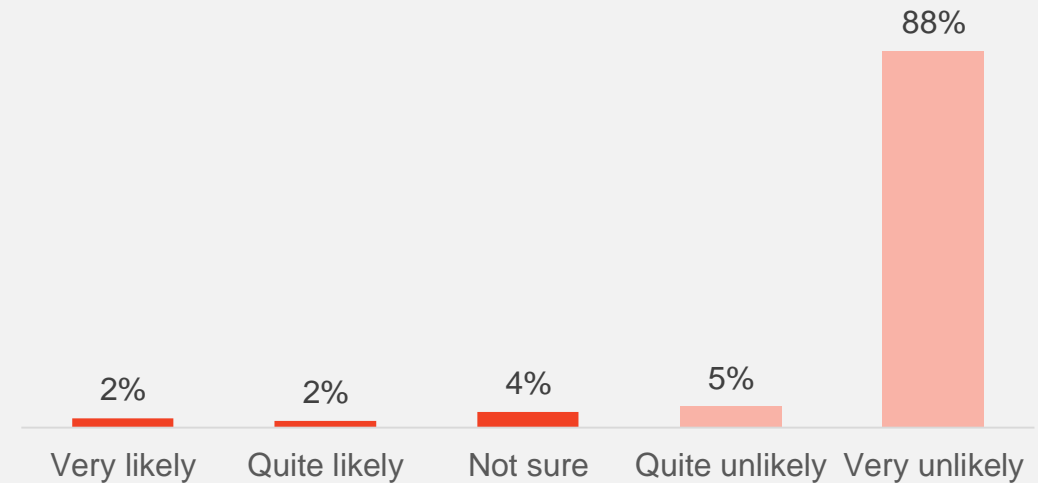
The large majority of New Zealanders are unlikely to either attend or bet on a greyhound race in the next 6 months.

Approximately 4% of the population are likely to attend or gamble on commercial greyhound racing in the next 6 months, indicating the financial benefits of commercial greyhound racing to the local economy are minor.

HOW LIKELY ARE YOU TO ATTEND A LIVE COMMERCIAL GREYHOUND RACE IN THE NEXT 6 MONTHS?



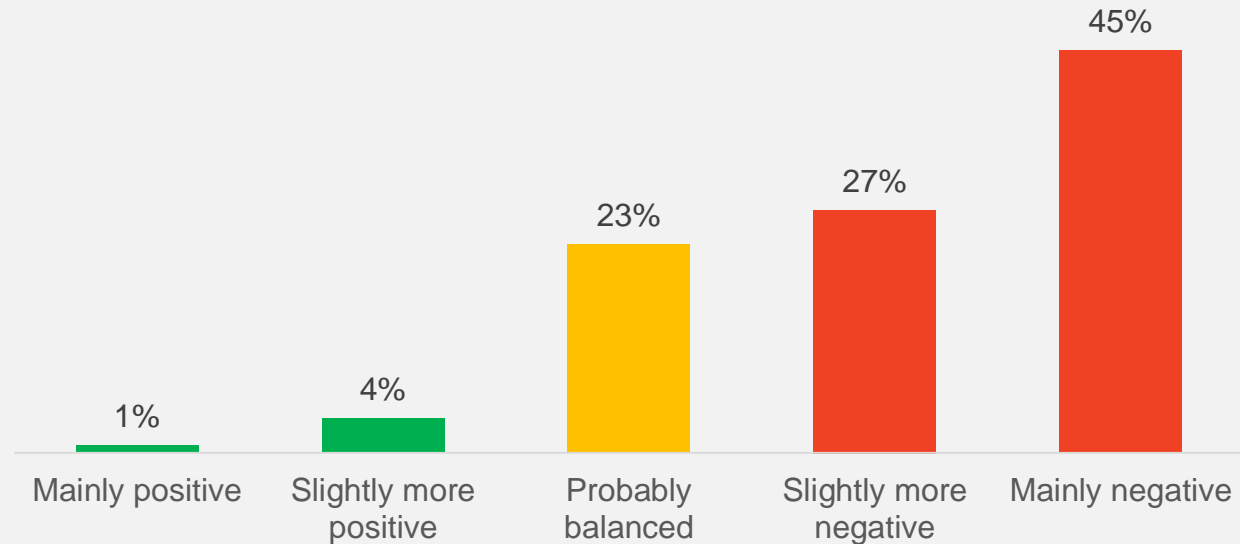
HOW LIKELY ARE YOU TO BET / GAMBLE ON COMMERCIAL GREYHOUND RACING IN THE NEXT 6 MONTHS?



GENERAL VIEW ON COMMERCIAL GREYHOUND RACING

On balance, most New Zealanders think there are more negatives than positives to commercial greyhound racing.

About a quarter think the positive and negative aspects are probably balanced, however 72% think there are more negative aspects.



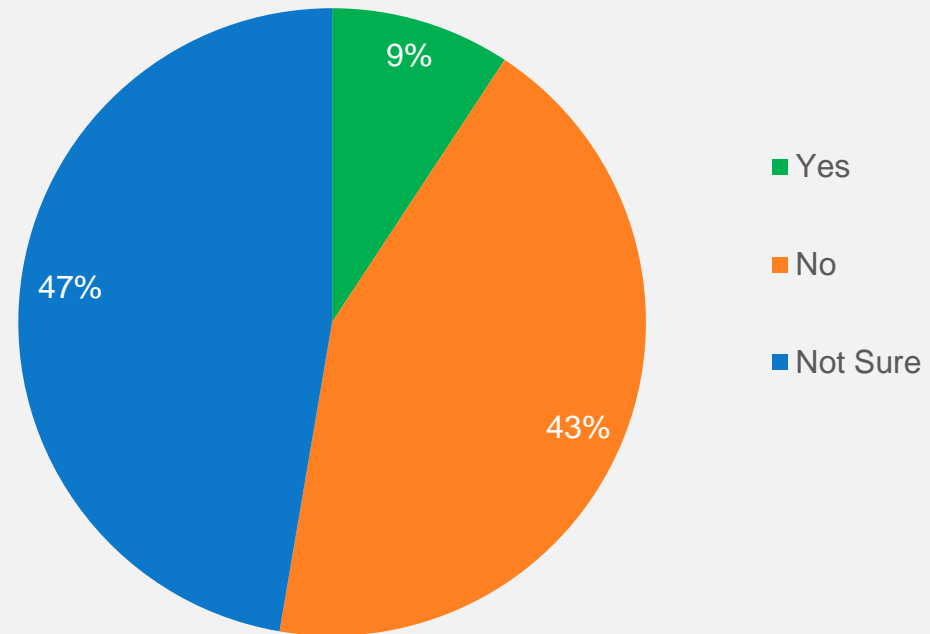
Q. Some people think there are positives to commercial greyhound racing while others think there are negatives. On balance, do you think there are more positive or negative aspects?

Base Total n=1,327

Only one in ten New Zealanders believe greyhounds bred for racing have a good life.

While almost half of New Zealanders aren't sure and 43% believe greyhounds do not have a good life.

PERCEPTION THAT RACING GREYHOUNDS HAVE A GOOD LIFE

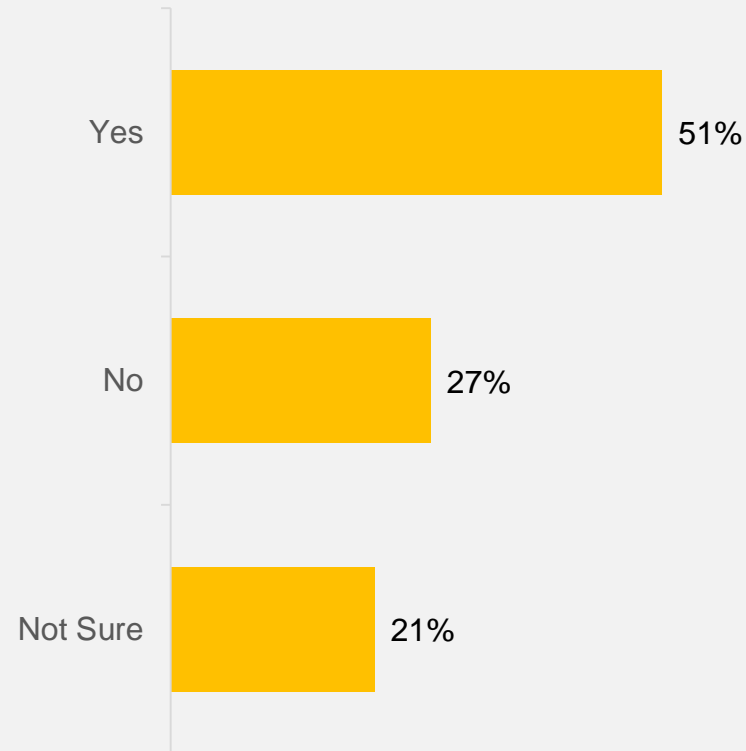


Q. Do you think greyhounds bred for racing have a good life?
Base Total n=1,327

Half of the population think that gambling in general is acceptable, however this falls to 21% when we talk about betting on greyhound racing.

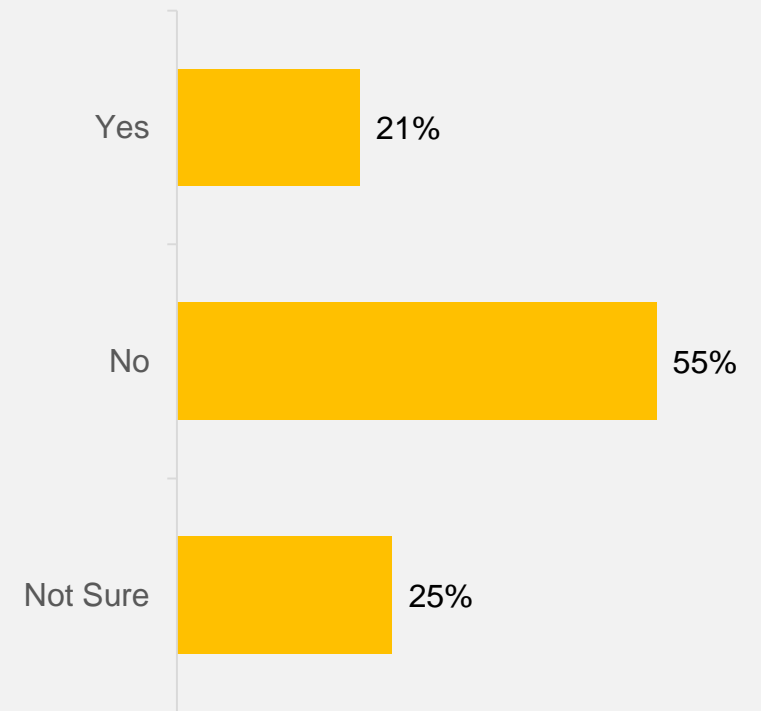
Over half(55%) do not think it is acceptable to bet on greyhound racing.

ACCEPTABILITY OF GAMBLING IN GENERAL



Q. In general, do you think any type of gambling is acceptable?
Base Total n=1,327

ACCEPTABILITY OF BETTING ON GREYHOUND RACING

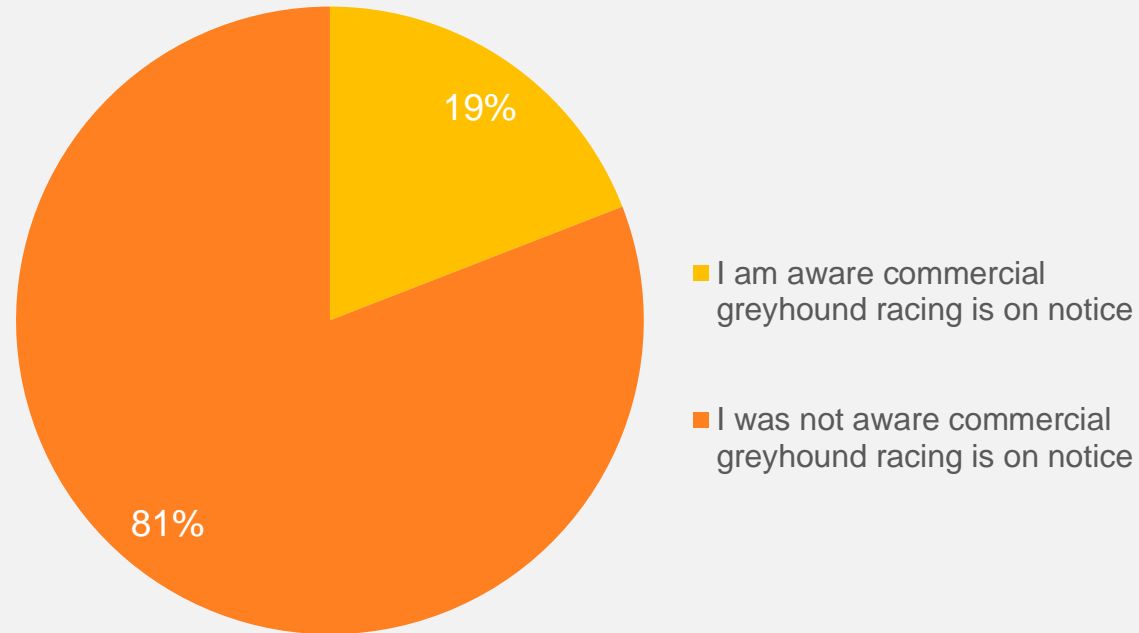


Q. Do you think betting on greyhound racing is an acceptable form of entertainment?
Base Total n=1,327

AWARENESS THAT GREYHOUND RACING IS “ON NOTICE”

Only one in five are aware commercial greyhound racing is on notice and at risk of being shut down if greyhound welfare, transparency, and data recording are not addressed.

Those who are aware are more likely to have watched or attended a greyhound race. They are also more likely to support racing and less likely to support a ban or sign a petition.



Q. Are you aware that commercial greyhound racing is “on notice” meaning that it could be shut down if greyhound welfare, transparency and data recording is not addressed?

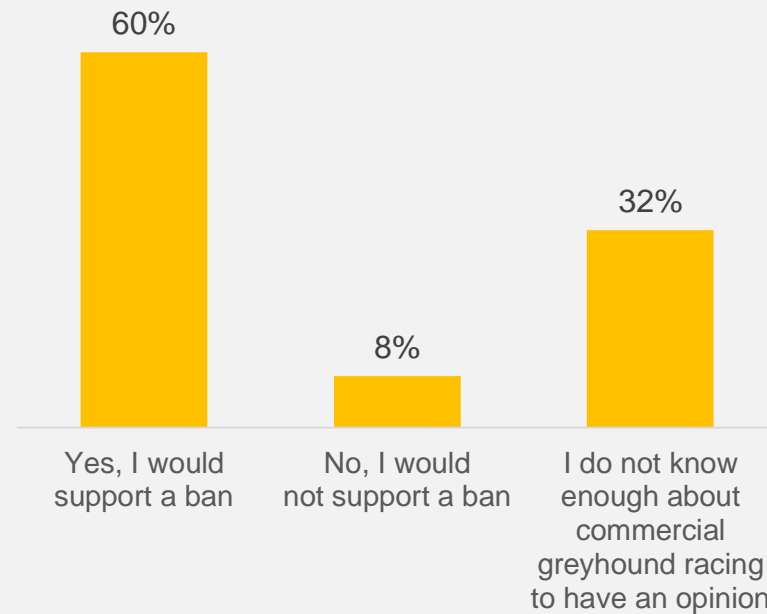
Base Total n=1,327

The majority of New Zealanders (60%) would support a ban on commercial greyhound racing, and half of New Zealanders (51%) would be willing to sign a petition.

Only 8% would not support a ban.

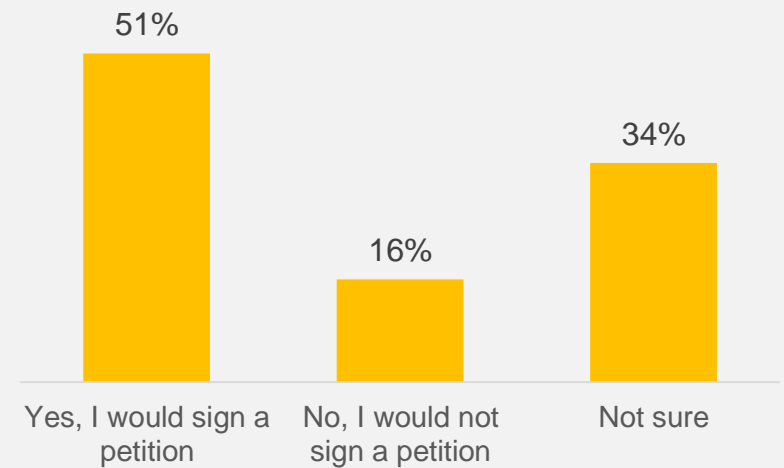
16% would not be willing to sign a petition.

SUPPORT FOR A BAN ON COMMERCIAL GREYHOUND RACING



Q. Would you support a ban on commercial greyhound racing in New Zealand?
Base Total n=1,327

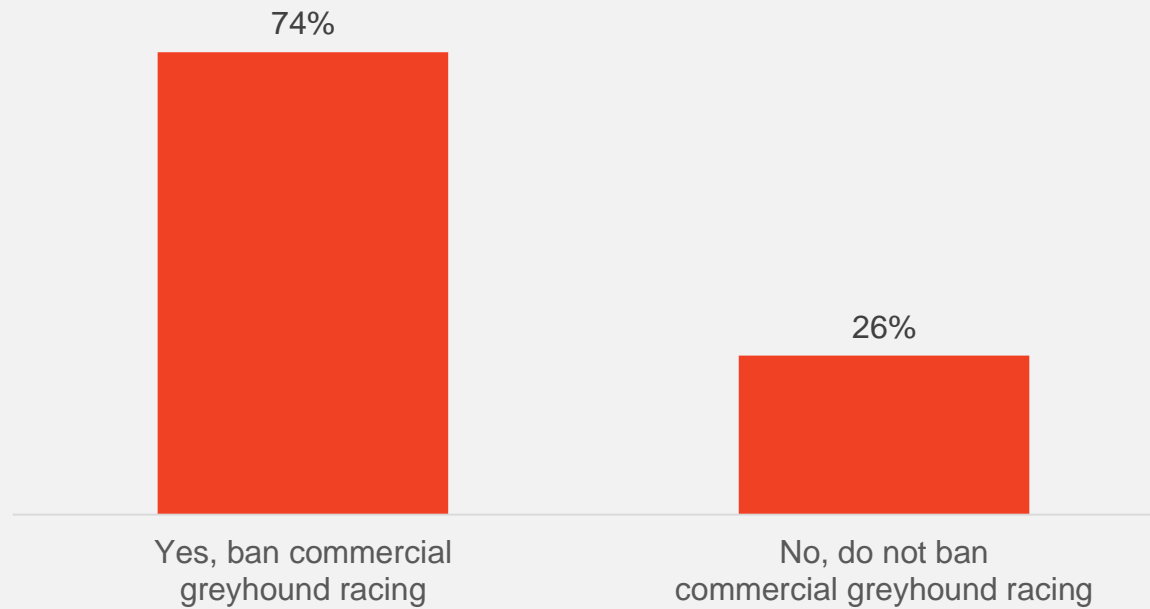
WILLING TO SIGN A PETITION



Q. Hypothetically, would you be willing to sign a petition supporting a ban to commercial greyhound racing?
Base Total n=1,327

Approximately three-quarters of New Zealanders would vote to ban commercial greyhound racing if a referendum was held.

LIKELY VOTING BEHAVIOUR IN REFERENDUM



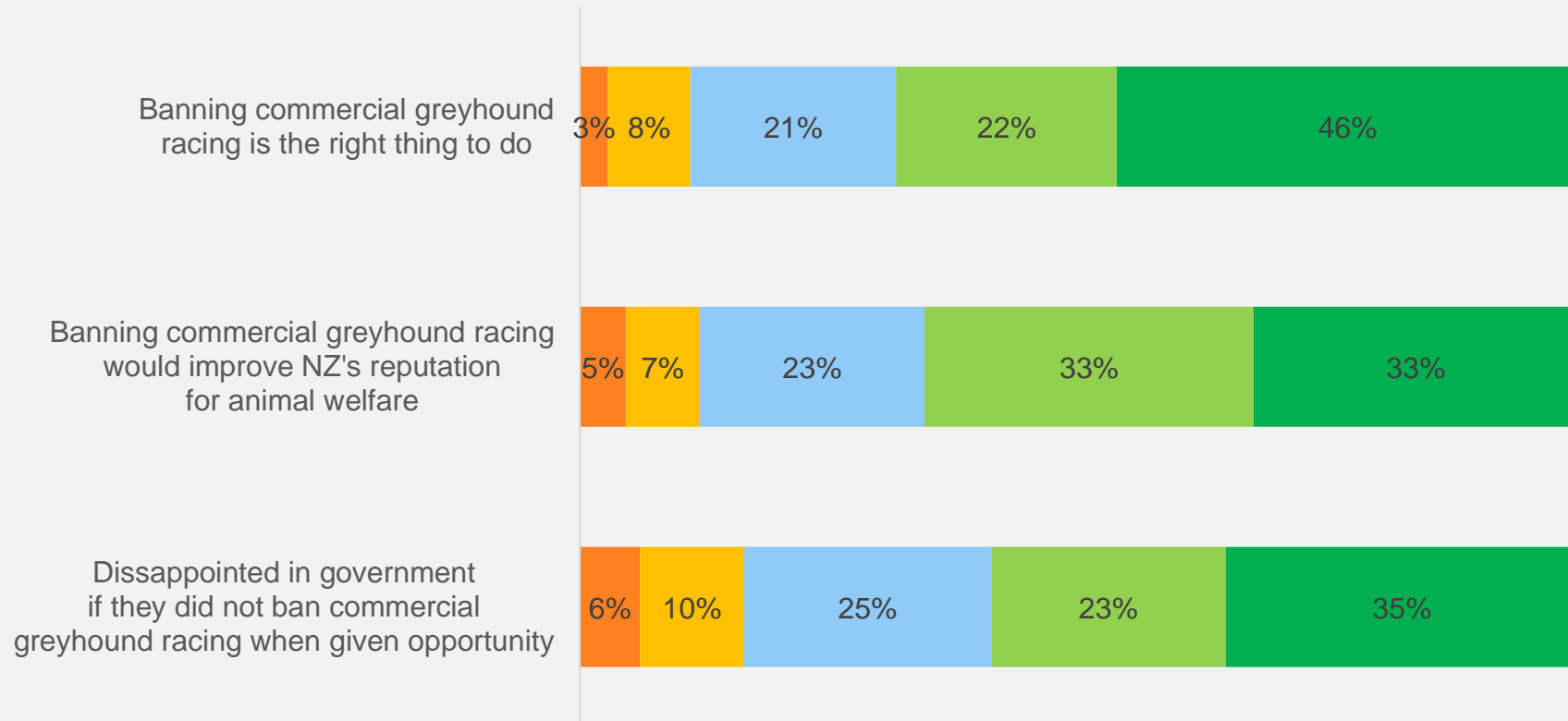
Q. If a referendum was held tomorrow to ban commercial greyhound racing how would you vote?
Base Total n=1,327

LEVEL OF AGREEMENT WITH STATEMENTS

The majority of New Zealanders (68%) agree banning commercial greyhound racing is the right thing to do.

The majority of New Zealanders (66%) also believe banning commercial greyhound racing would improve New Zealand's reputation for animal welfare.

55% of New Zealanders would be disappointed if the government did not ban commercial greyhound racing if given the opportunity.

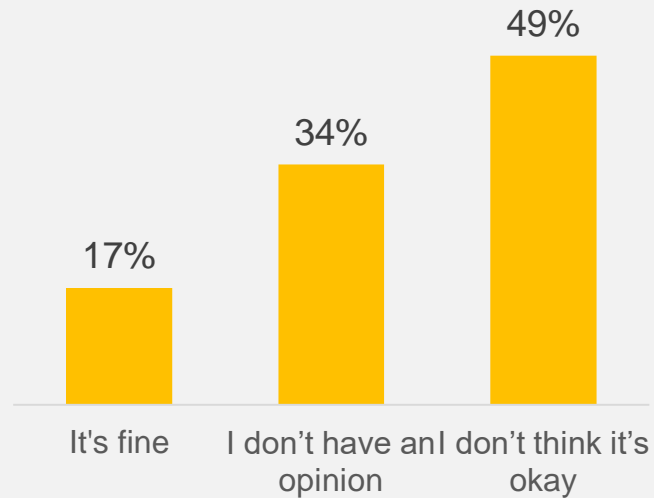


Q. Do you disagree or agree with the following statement?
Base Total n=1,327

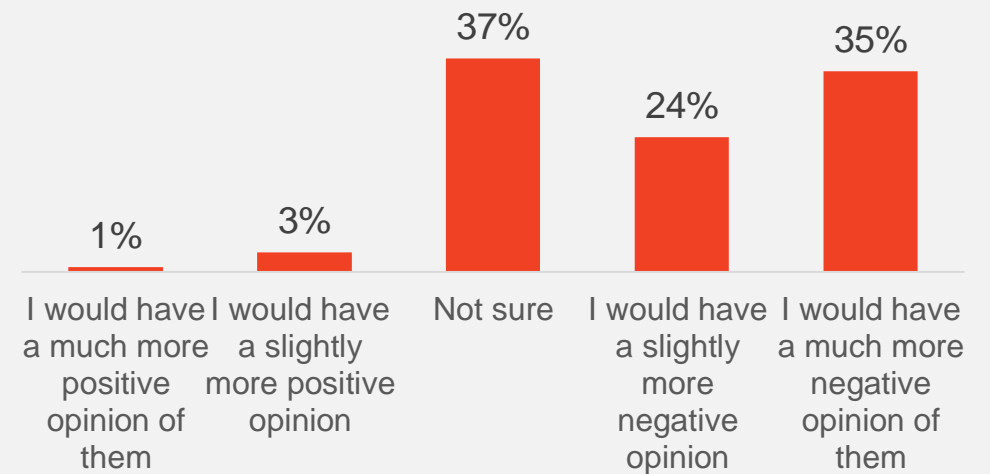
IMPACT OF SPONSORSHIP AND SUPPORT ON BRAND EQUITY

Almost half of New Zealanders do not think it is okay for a brand to sponsor or financially support commercial greyhound racing.

A third say that they would have a much more negative opinion of a brand that sponsors commercial greyhound racing and another quarter so they would have a slightly more negative opinion.



Q. Do you think it is okay for brands to sponsor and financially support commercial greyhound racing?
Base Total n=1,327



Q. What do you think of brands that do sponsor and financially support commercial greyhound racing?
Base Total n=1,327



THANK YOU

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