



LIVE EXPORTS NZ MARKET RESEARCH

CAMORRA RESEARCH REPORT

PREPARED IN CONFIDENCE FOR SPCA DECEMBER 2023

The Camorra Research Ltd logo is a blue downward-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
RESEARCH LTD



Setting the scene

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 is therefore to provide unbiased and reliable data regarding:

- Current awareness and familiarity with live exports
- Understand current 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



Research Sample

Camorra Research are sampling experts in the market research industry

In order to ensure representativeness of results we surveyed a large robust base of 993 respondents.

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

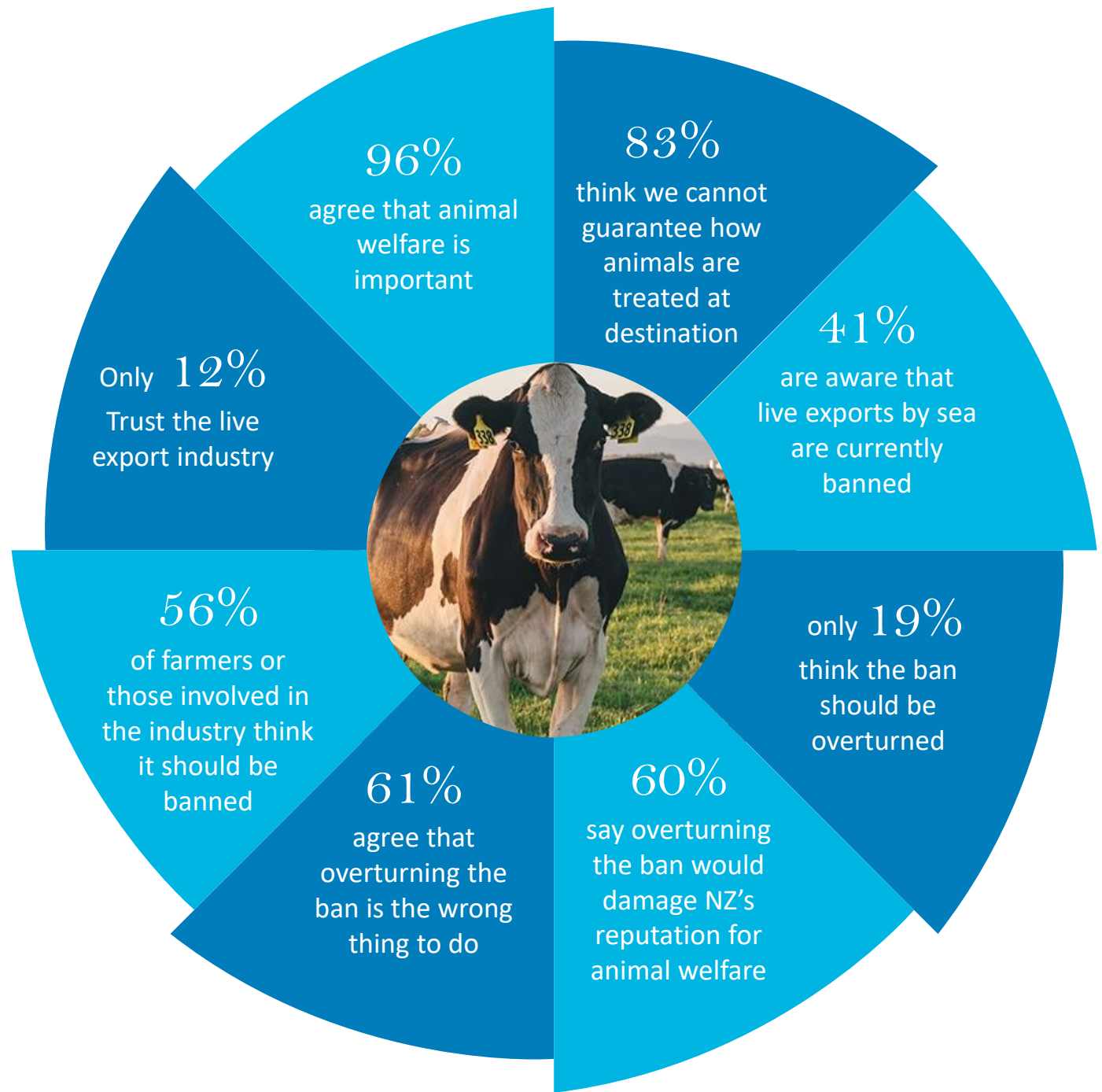
To ensure representativeness, we employed a multi cell quota design with interlocking quotas for age, gender, and region. Final data was weighted to NZ Census data.

Questionnaire was designed using balanced response scales.



We interviewed **993**
New Zealanders about the live
export industry in NZ.

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

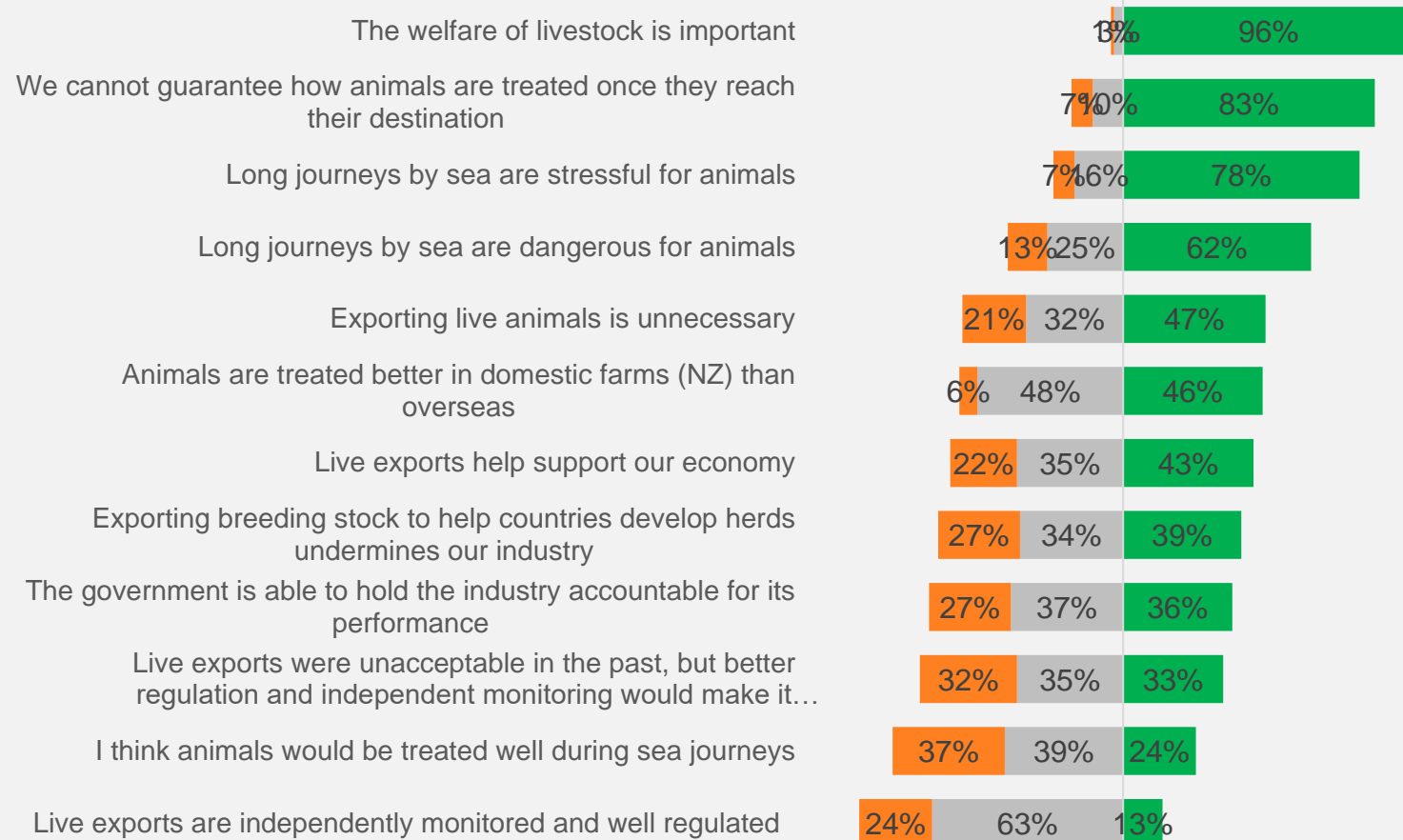


New Zealanders are near unanimous that animal welfare is important, however the vast majority do not believe we can guarantee this once animals reach their destination.

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

Agreement with attitude statements

■ Don't know ■ Disagree ■ Agree

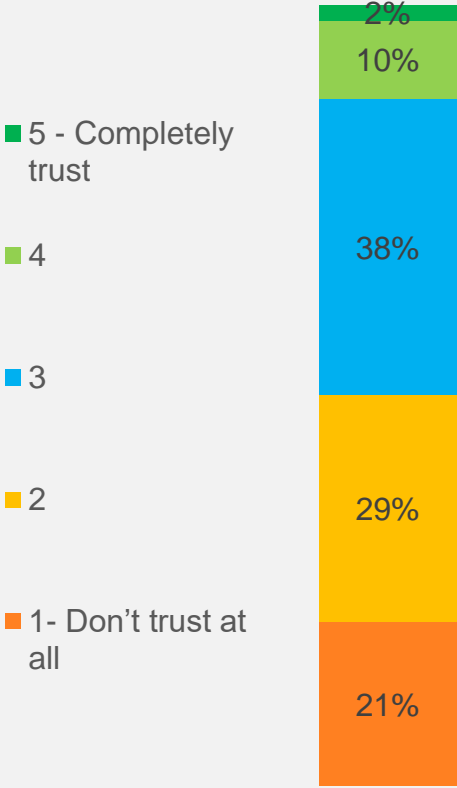


Q. First, we're interested in your opinions about what is acceptable when it comes to live export of farmed animals by sea from New Zealand. Do you agree or disagree with the following statements.
Base Total n=993

Initial views of the live export industry

There is very low public trust in the industry (only 12%).

Trust in the industry



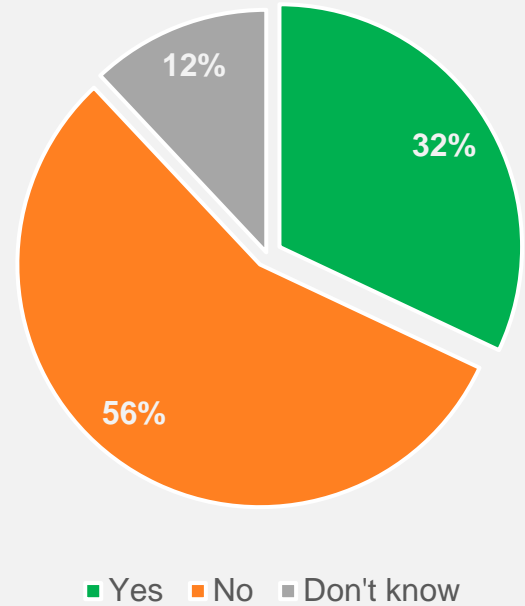
Q. On a scale of 1-5, how much do you trust the live export industry?
Base Total n=993

Familiarity with the live export industry

The majority would agree that they are not familiar with the industry, although a third are familiar.

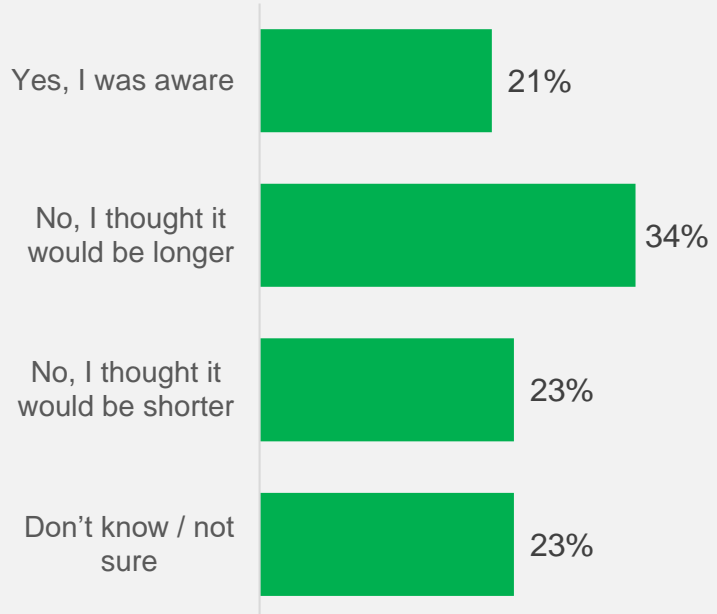
When asked about the average sea journey from New Zealand, 22% stated they were aware that this was 19 days, while a third assumed it would be longer.

Familiarity



Q. Are you familiar with the live export industry?
Base Total n=993

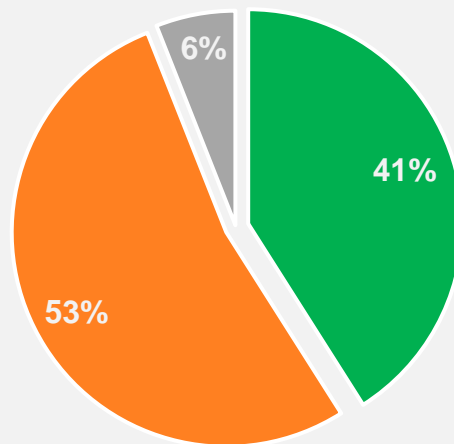
Aware of average sea journey length



Q. Are you aware that the average sea journey from New Zealand is 19 days?
Base Total n=993

Current awareness of ban and potential overturn

Aware of current live export ban

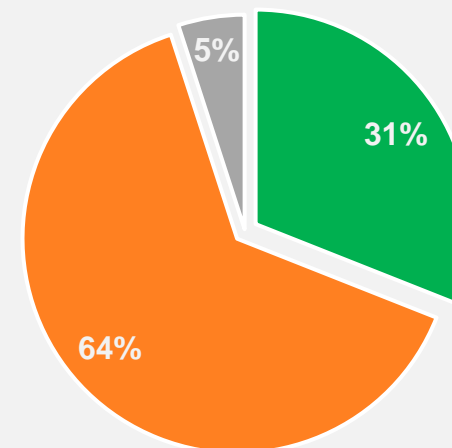


■ Yes ■ No ■ Don't know

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 Total n=993*

Aware of current movement to overturn this ban



■ Yes ■ No ■ Don't know

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.

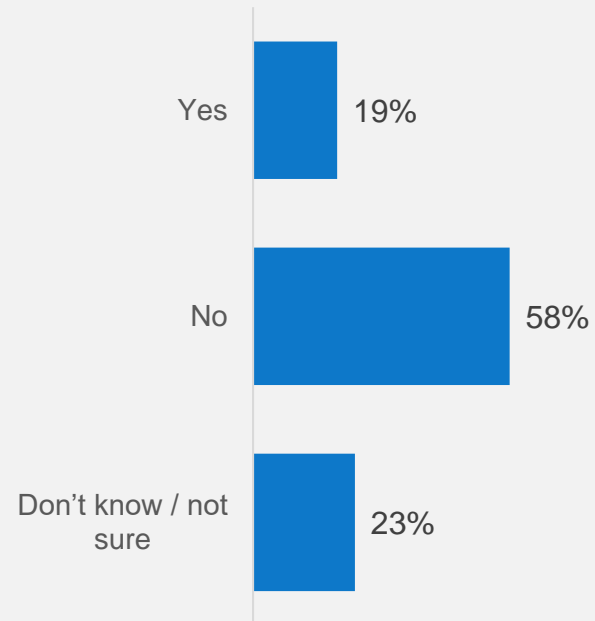
*Were you aware of this?
Base Total n=993*

Just over half are unaware or unsure of the current live export ban, and two thirds are unaware of the current movement to overturn this ban.

Reaction to potential overturn of live export ban

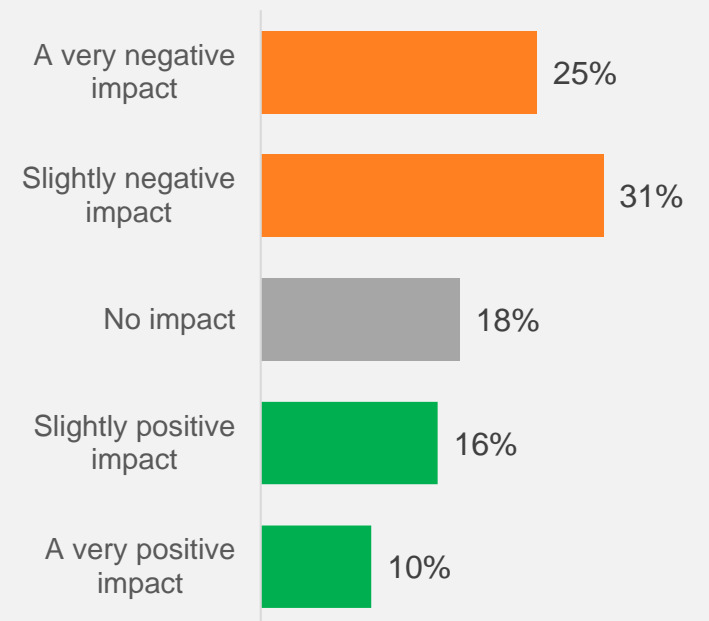
The majority of New Zealanders do not think the ban should be overturned, and over half think that overturning the ban would have a negative impact on our reputation.

Do you think the ban should be overturned



Q. Do you think the ban on live exports should be overturned?
Base Total n=993

Impact on New Zealand's reputation

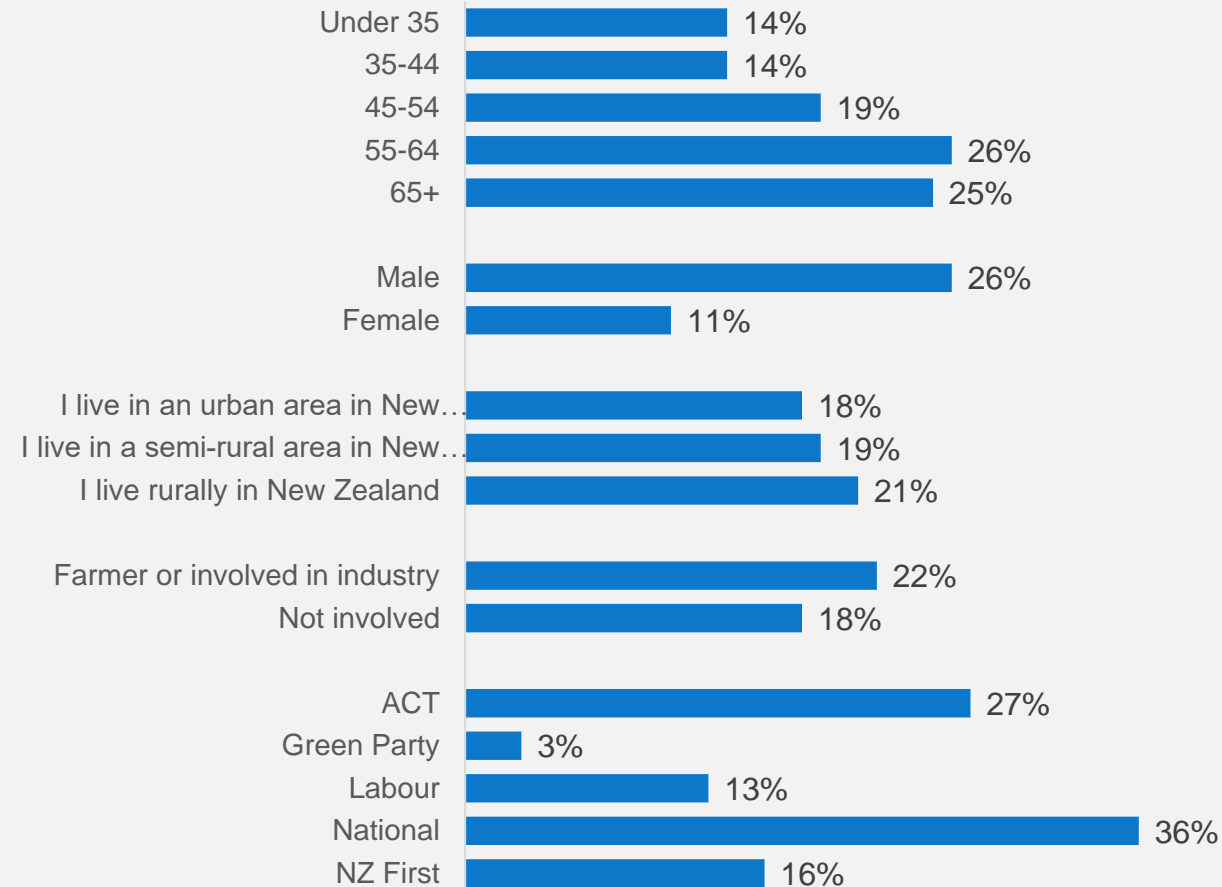


Q. New Zealand was the first country to ban live exports for both slaughter and breeding. What impact do you think overturning the ban would have on NZ's reputation?
Base Total n=993

We see age and gender skews in support of overturning the ban on live exports, with the largest support among National voters followed by ACT voters.

Do you think the ban should be overturned

% responding "Yes"



Q. Do you think the ban on live exports should be overturned?
Base Total n=993

SELECTED RESPONDENT VERBATIMS

Perceptions of government if overturn the ban on live exports

There are mixed opinions among respondents when asked what they would think if the government overturned the ban. However, there are more negative comments.

Some are resigned as this is a new government and others think it provides additional revenue sources for farmers. But many talk of being disappointed, angry and the potential impact to both animal welfare and New Zealand's reputation.

It would **depend on what policies or procedures** they had in place for the exporting - by air i'd probably be ok with as it's a much shorter and less traumatic experience in my opinion, but i don't believe it's necessary to overturn the ban so would be a little disgusted.

Animals are well looked after in NZ **BUT overseas and in other countries it's not good**. NZ needs to keep the ban.

There is a new government in place so **as long as they have listened to people in NZ** then no issue with this. I am not qualified to judge this particular issue but have no issue with governments revoking previous laws.

That **money is more important** than animal welfare.

It would **look pretty bad** but also typical, new governments like to dismantle policies that previous governments put in place

Very hypocritical, very **anti-animal welfare** and not the sort of image New Zealand should project.

This would be a **shortsighted move** and interpreted as the opposition undoing the work of a previous government for no good reason. The **cost required to undo** the ban, including the reversal of the regulations and business changes made, would outweigh any economic benefit.

I would be very **disappointed**. Our country should show how much we care for our livestock and sea transport is not a good option.

I would be **disappointed and angry**. It would affect my vote in future elections

I think that the state that the last Government has left our economy, we need to look at all avenues to get our country **back on track fiscally**. However, I feel that we need to have strict guidelines in place for the health and safety of the livestock and look at the long term goals and outcome of this plan.

Q. In your own words, what would you think if the government made plans to overturn the ban on live exports less than a year after it came into effect?

SELECTED RESPONDENT VERBATIMS

How could the government make it acceptable to overturn the ban

When asked what the government could do to make overturning the ban acceptable, the vast majority of respondents stated there was nothing the government could do.

Those who offered suggestions, focused on safeguarding and guaranteeing the welfare of animals both during transit and at destination. Practices to limit the numbers of animals, regulate the industry and help guarantee care would help.

Not in my eyes, no. I feel as though **overturning the ban would be backtracking and not progressive**. New Zealand is renown Globally for their progressive and liberating views on the World, so I feel this would be extremely embarrassing for the country to overturn the ban

Allowing **very few number of animals** with very high quality of conditions ??

Better policing and right government agencies has the mandate to impose fines and penalties to those who do not meet acceptable practices and standards in place.

24/7 camera monitoring of livestock while in transit to ensure safety and health of animals

Independent review board to oversee the shipping of animals, with officials at both ends of the trip to check the animals health and well-being

No, it would **always be stressful** and it is unnecessary.

No - **nothing at all** - live exports by sea is wrong 100%

Employ adequate certified **welfare specialists to accompany** the live animals on the journey to ensure health and safety and humane treatment and conditions are provided and meet by all parties involved

Guarantee and regulate conditions but I feel like in reality that wouldn't happen

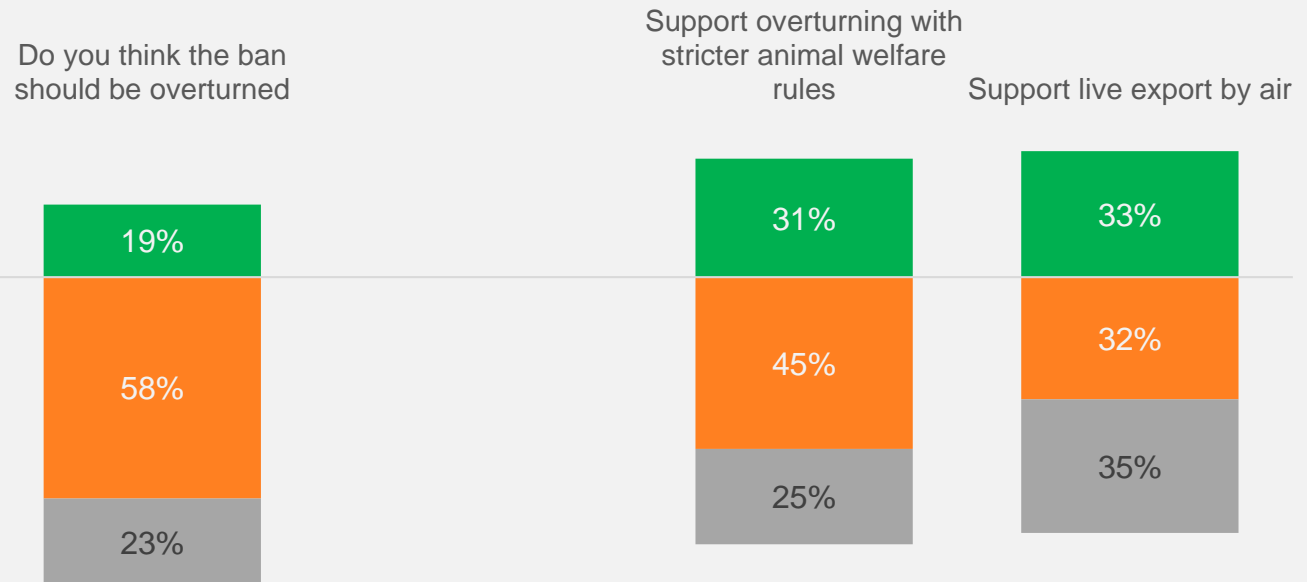
I believe the regulations and checks required to make the practice acceptable, would make the **cost of doing it prohibitive**.

Changes to the process to focus on animal welfare, such as **animal care during** sailings, **less animals** per sailing to avoid overcrowding, etc.

Q. In your opinion, is there anything the government could do that would make overturning the ban acceptable?

Support for overturning the ban increases if alternatives are offered that are viewed as better for animals, i.e. either if the government introduced stricter welfare rules, or if export was by air.

Support for potential alternatives



Q. Do you think the ban on live exports should be overturned ?

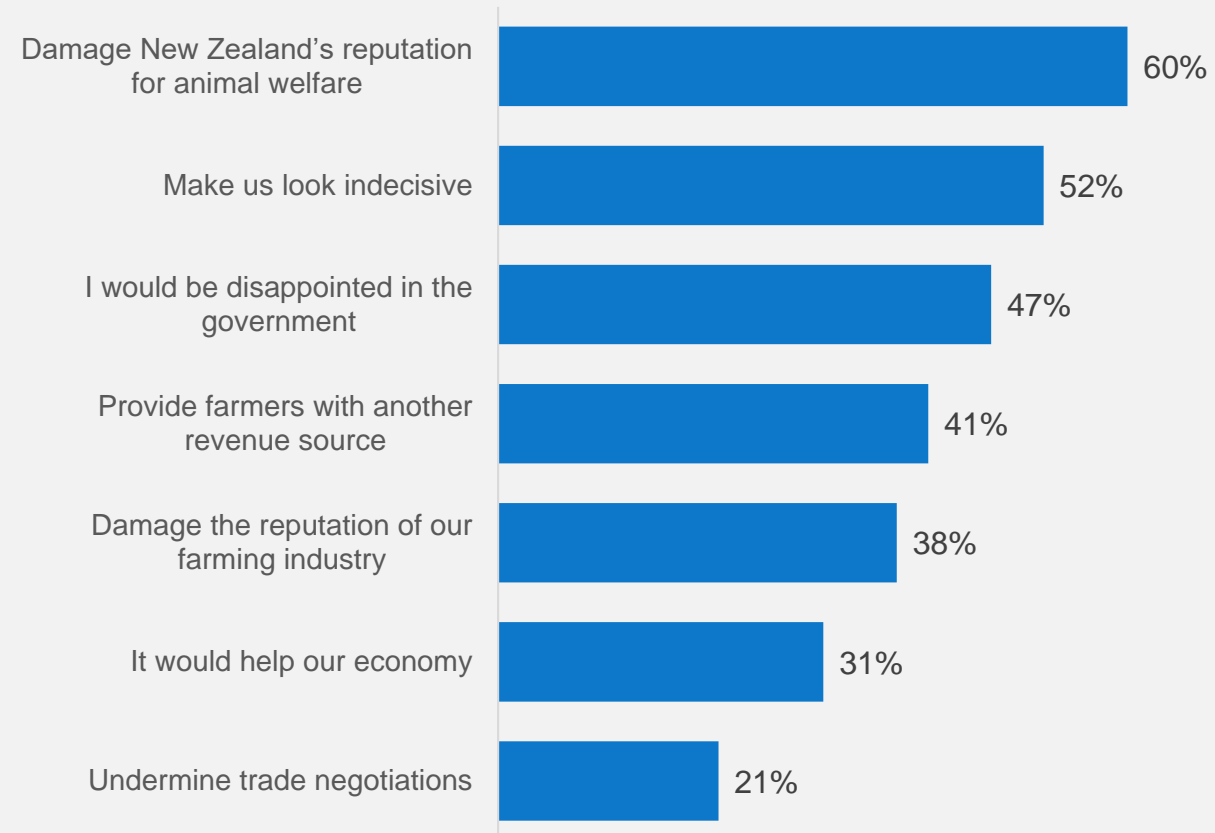
Q. Would you support overturning the ban on live exports if the government introduced stricter animal welfare rules?

Q. Would you support the live export of farmed animals by air?

Base Total n=993

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.

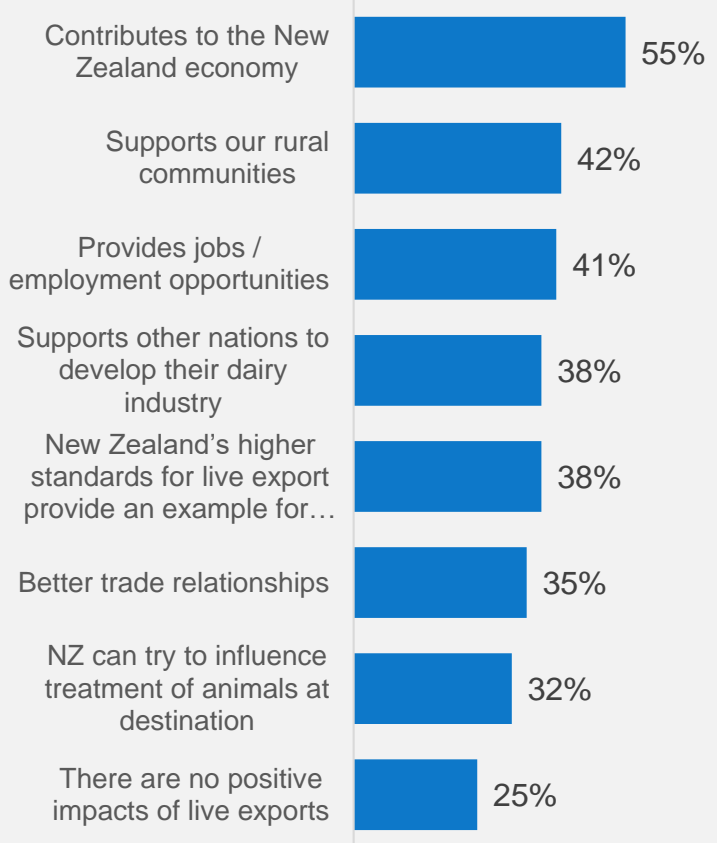
Impacts of overturning the ban on live exports



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

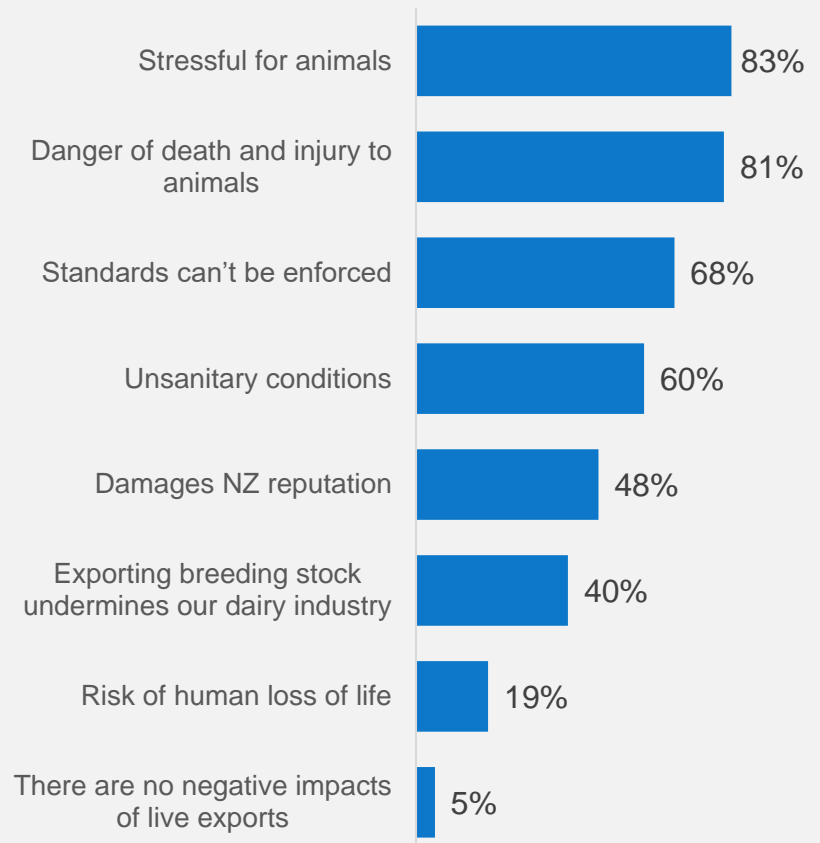
Pros and cons to overturning the ban on live exports

Positives



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

Negatives



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

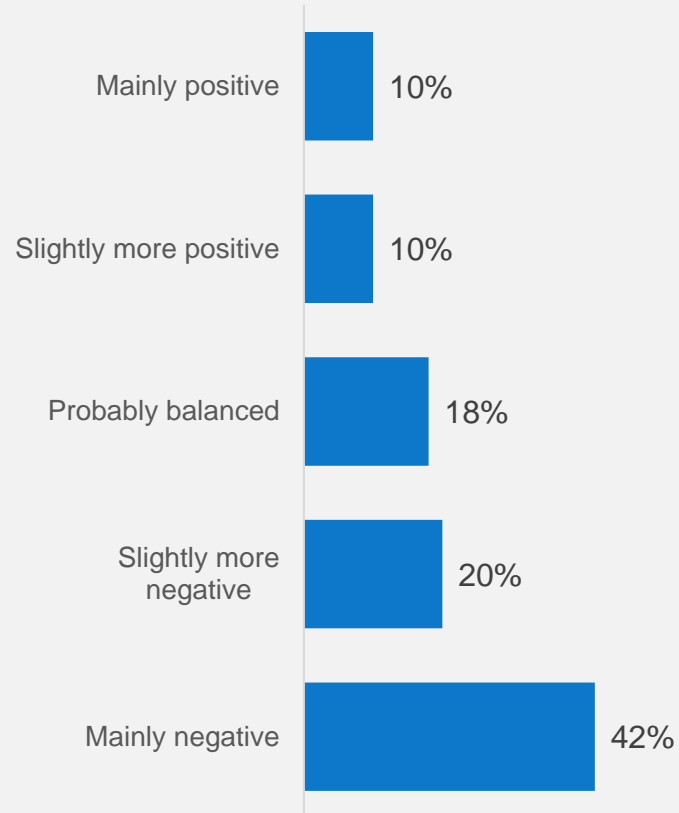
When prompted New Zealanders can see both positives and negatives to the live export industry, however they are significantly more likely to think there are negatives, mainly the danger of death and injury, stressful to animals and that our standards cannot be enforced at destination.

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

The majority, 62% think that there are more negative aspects to the live export industry.

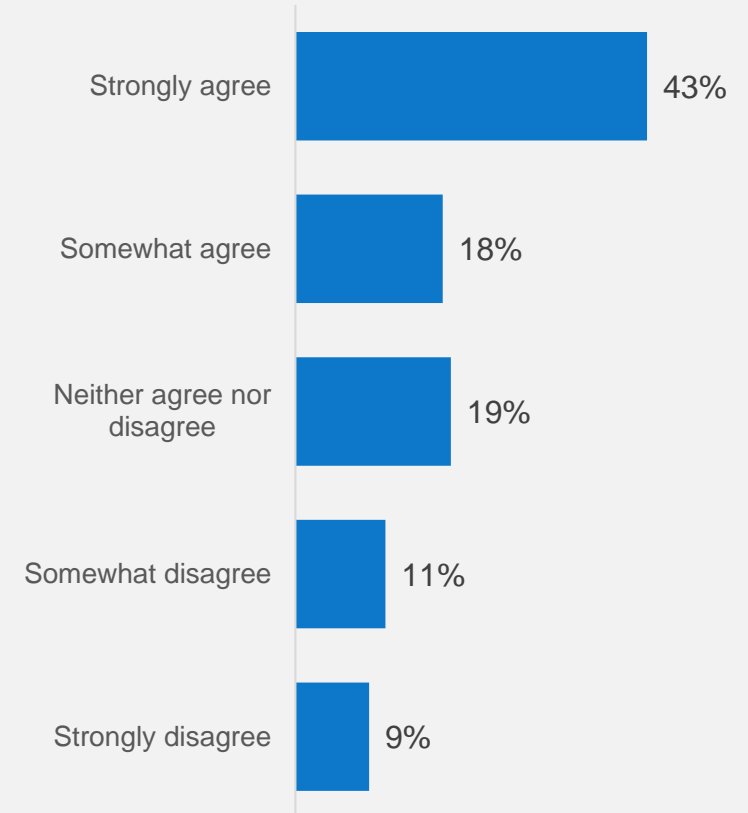
And almost two thirds (61%) agree that overturning the ban is the wrong thing to do.

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



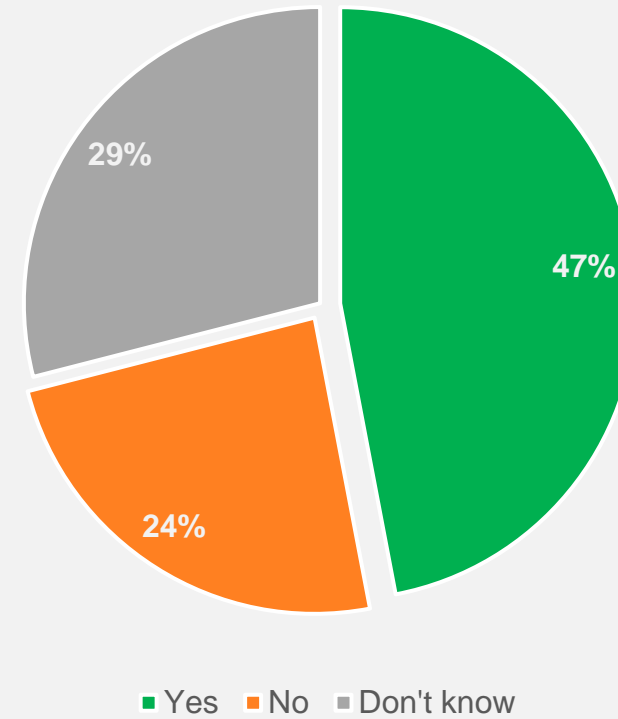
Q. On balance, do you think there are more positive or negative aspects?
Base Total n=993

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 Total n=993

Would sign a petition to stop the government overturning the ban



Q. Hypothetically, would you be willing to sign a petition to stop the government from overturning the ban on live exports.
Base Total n=993

Half would be willing to sign a petition to stop the government from overturning the current ban on live exports.

IN SUMMARY

ANIMAL WELFARE IS IMPORTANT

New Zealanders are near unanimous that animal welfare is important.

However, 83% do not believe we can guarantee animal welfare once they reach destination and the majority agree that long journeys by sea are both dangerous and stressful for live animals.

Therefore, there is very low public trust (12%) in the live export industry.

MANY ARE UNAWARE OF THE CURRENT BAN

The majority, 62% think that there are more negative aspects to the live export industry, and many think live export by sea should be banned,

However just over half are unaware or unsure of the current live export ban, and two thirds are unaware of the current movement to overturn this ban.

BUT MAJORITY DO NOT THINK THE BAN SHOULD BE OVERTURNED

Only 19% of New Zealanders think the ban should be overturned.

Over half think that overturning the ban would have a negative impact on our reputation, and it would make us look indecisive. Many talk of being disappointed and angry if this happened.

Almost two thirds (61%) agree that overturning the ban is the **wrong** thing to do.



THANK YOU



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