Dairying Environment Survey
December 2021

Prepared for

Greenpeace

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EXECUTIVE SUMMARY

Approach

These results are from a HorizonPoll study conducted between 30 November and 6 December 2021. The total sample size was 1,022 adults, 18 years of age and over.

The maximum margin of error is ±3.1% (at the 95% confidence level) though this increases for any subgroup, as well as any comparison between subgroups.

The data was weighted on age, gender, level of education, employment status, region and ethnicity to be representative of the adult New Zealand population at the 2018 census.

Summary

More New Zealanders favour regulating to reduce water contamination and greenhouse gas emissions than oppose the idea (48% support, 37% oppose).

A further 15% weren't really sure. **There is mixed support for this idea.**

Most people think the Government should phase out the use of synthetic nitrogen fertiliser (54%) with 25% saying they shouldn't and 21% unsure. **This idea is well-supported.**

Most people are opposed to the Government making laws to lower the number of dairy cows (57%) although 25% support the idea and 18% are unsure. **This idea has equal unpopularity across the board.**

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REPORT

1. Dairying

In summary, there is widespread support for regulating dairying to achieve cleaner waters and reduce greenhouse gas emissions and phase out synthetic nitrogen fertilizer use. However, a majority oppose tackling these with new laws to cut the number of cows.

- More New Zealanders favour regulating to reduce water contamination and greenhouse gas emissions than oppose the idea (48% support, 37% oppose).
- A majority (54%) support phasing out synthetic nitrogen fertiliser. However
- A majority (51%) oppose passing laws to lower the number of dairy cows in the country, while just 25% support this.

Respondents were given the following information:

Since 1990 the number of dairy cows in New Zealand has increased from 3.4 to 6.3 million.

Intensive dairy farming today relies on extensive use of synthetic nitrogen fertiliser. Nearly seven times more of this fertiliser is used now compared with 1990.

Some scientific research shows that pollution from the increase in synthetic nitrogen fertiliser and the rise in dairy cow numbers has degraded the water quality of New Zealand rivers and lakes. Medical researchers also say that nitrate contamination of drinking water is linked to increased risk of bowel cancer and preterm birth.

The Dairy industry is also the largest contributor to New Zealand's greenhouse gas emissions.

Some argue that the government must do more to stop climate pollution and contamination of New Zealand waterways caused by intensive dairy farming, by cutting the use of synthetic nitrogen fertiliser and reducing the numbers of dairy cows.

Others argue that the dairy industry makes a huge economic contribution to New Zealand and that farmers are fencing off waterways and taking other steps to reduce nitrogen runoff, and many are preparing plans to monitor and reduce their greenhouse emissions. They say the industry is making progress and should be given more time to make changes.

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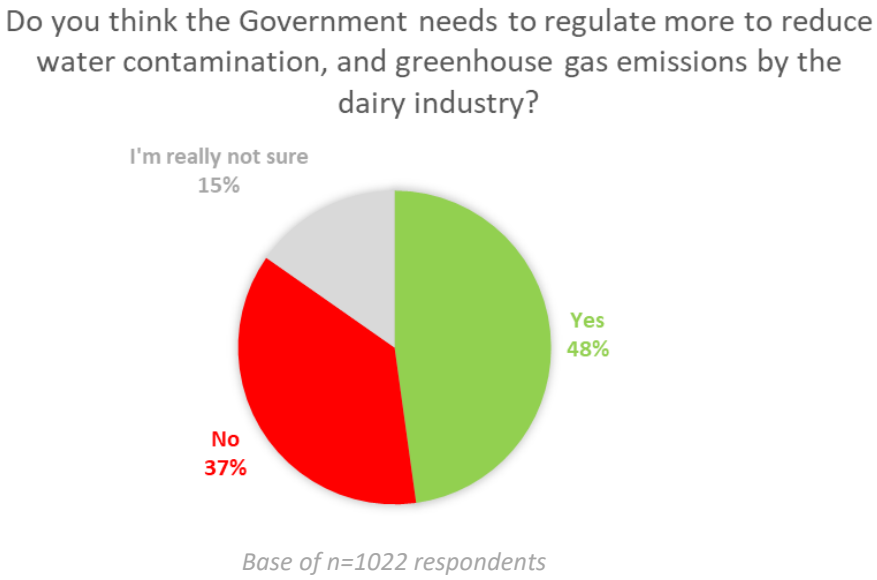
1.1 Government regulation

People are divided about whether the Government needs to regulate more to reduce water contamination, and greenhouse gas emissions by the dairy industry, with **48% in favour**, and **37% opposed**. A further 15% weren't really sure.

- 48% in favour = 1,895,300 adults (18+) [1]
- 37% opposed = 1,463,100
- 15% unsure = 606,700

Groups more likely to support extra regulation include:

- Younger people
- People in households with higher incomes
- Asians, Indian and Māori
- People with a tertiary qualification
- Professionals, senior government officials and students
- Green and Labour voters

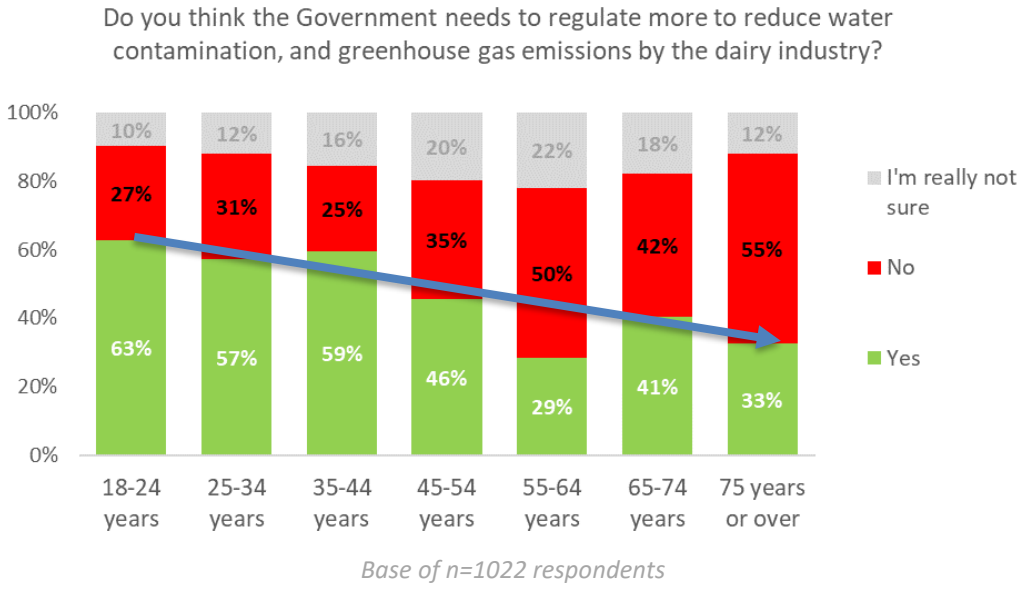


Base of n=1022 respondents

[1] NZ Statistics estimate of the adult (18+) population as at 30 June 2021 was 3,965,082

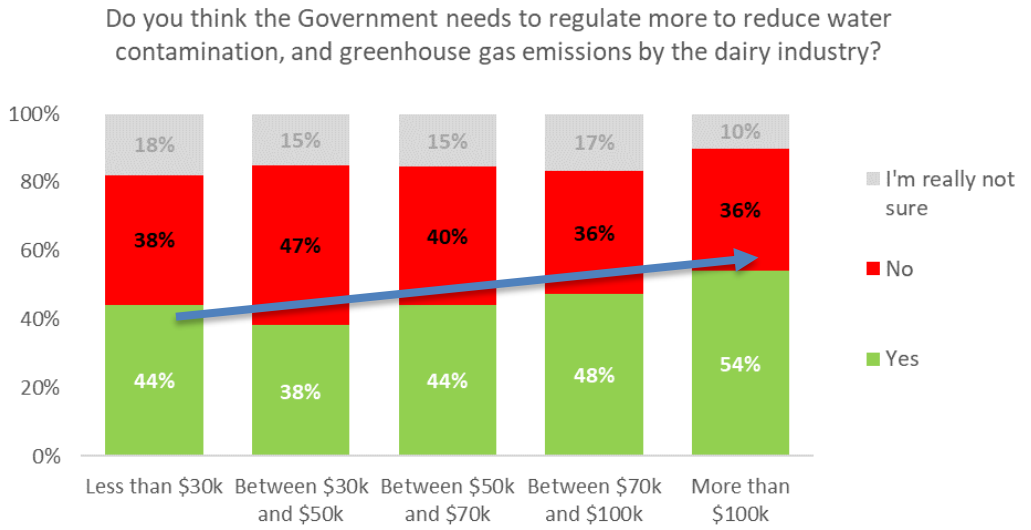
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There is little difference by gender [2], but **the <u>older</u> someone is the <u>less likely</u> they are to favour further regulation**.



Base of n=1022 respondents

Households with <u>lower</u> annual incomes are <u>less</u> likely to favour further regulation.



Base of n=1022 respondents

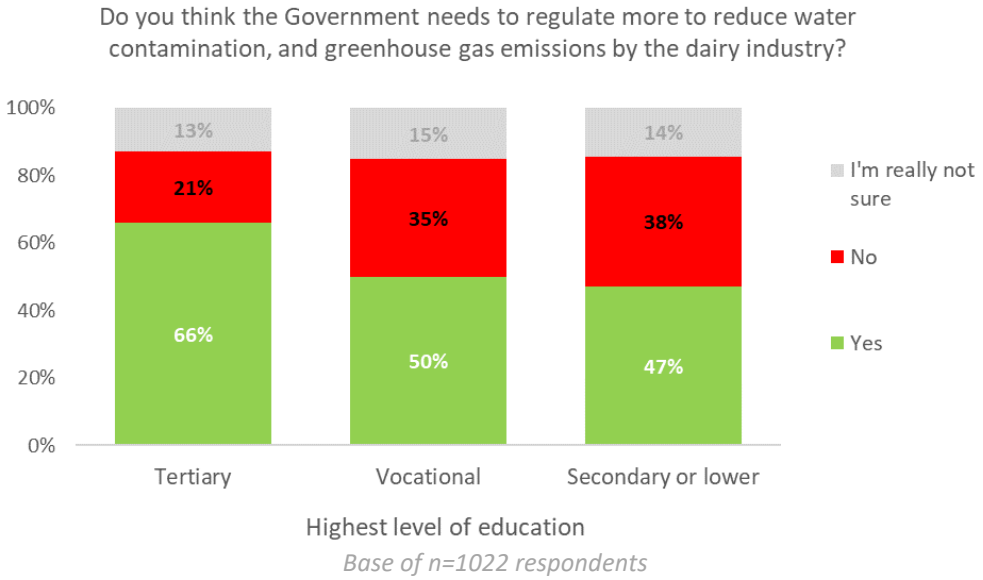
[2] People who identify as another gender are included in the overall results and the tables, but due to the low sample size (only 5 in this study) they are not reported on separately.

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Asians and Indians are more likely to want further regulation (71% and 80% respectively). Māori are significantly more likely to support it compared to NZ Europeans/Pākehā (58% compared to 46%).

Government needs to regulate dairy industry more?	ETHNIC GROUP [3]						
	Asian	Indian	Māori	NZ European/ Pākehā	Other European	Pasifika	Other [4]
Yes	71%	80%	58%	46%	52%	39%	41%
No	13%	9%	31%	44%	29%	36%	44%
Unsure	17%	11%	11%	15%	20%	25%	15%
Sample size	*75*	*62*	*81*	*787*	*112*	*28*	*34*

People with tertiary qualifications are more likely to want more regulation (66% compared to 48% without.)



Occupations more likely to support more regulation include:

- Professional /Senior Government Official (66%)
- Student (72%)

Less likely include:

- Business Proprietor/ Self-employed (34%)
- Farm Owner/ Manager (20%)
- Retired/ Super-annuitant (34%)

Those employed in the agriculture, forestry or fishing industries are also less supportive (32%).

[3] Note the low sample sizes for people who identify as Pasifika.
[4] Other may include African, South American and Middle Eastern.

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Of those who cast a party vote at the 2020 general election, Green and Labour voters support more regulation. ACT and National voters are opposed to it.

94% of Green voters and 59% of Labour voters support more regulation. Just 21% of ACT and 31% of National voters support it.

Government needs to regulate dairy industry more?	2020 PARTY VOTE [5]			
	ACT	Green	Labour	National
Yes	21%	94%	59%	31%
No	67%	2%	24%	59%
Unsure	11%	4%	17%	10%
Sample size	*94*	*102*	*399*	*234*

Support for more regulation comes from large cities. People in Auckland, Wellington and Christchurch are significantly more likely to support more regulation (54%) compared to those outside those cities (41%).

Government needs to regulate dairy industry more?	LOCATION [6]			
	Auckland Wellington Christchurch	Upper North Island	Lower North Island	South Island
Yes	54%	39%	43%	45%
No	31%	45%	43%	39%
Unsure	15%	16%	13%	16%
Sample size	*519*	*205*	*179*	*117*

Those who are unsure

People who are unsure about the issue (15%) are more likely to be:

- Female (18%)
- 45 to 64 years of age (20%)
- Europeans who don't identify as New Zealanders (20%)
- Asian (17%)
- Less educated (NCEA level one or below, 24%)
- With children in the household (18%)
- In manufacturing or construction (19% and 18%) or education (22%).

[5] Only political parties with a sample size of over 50 are shown. Full results are in the Excel tables.
[6] These categories are mutually exclusive, so the results for South I

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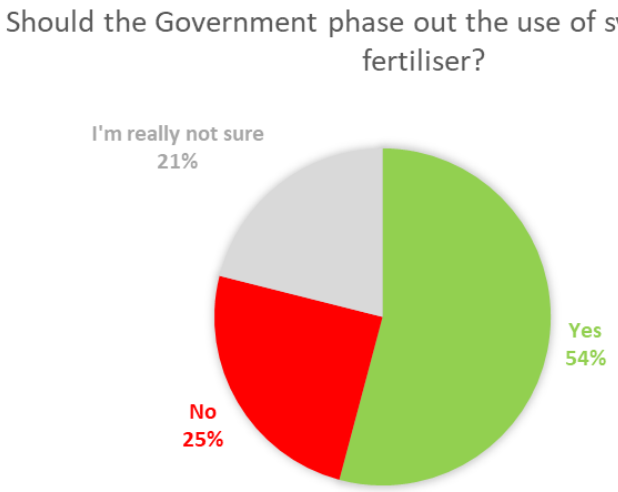
1.2 Synthetic nitrogen fertiliser

A majority thinks the Government should phase out the use of synthetic nitrogen fertiliser (54%) while 25% say it shouldn't and 21% are unsure.

- 54% in favour of a phase-out = 2,149,000 adults (18+)
- 25% opposed = 983,300
- 21% unsure = 836,600

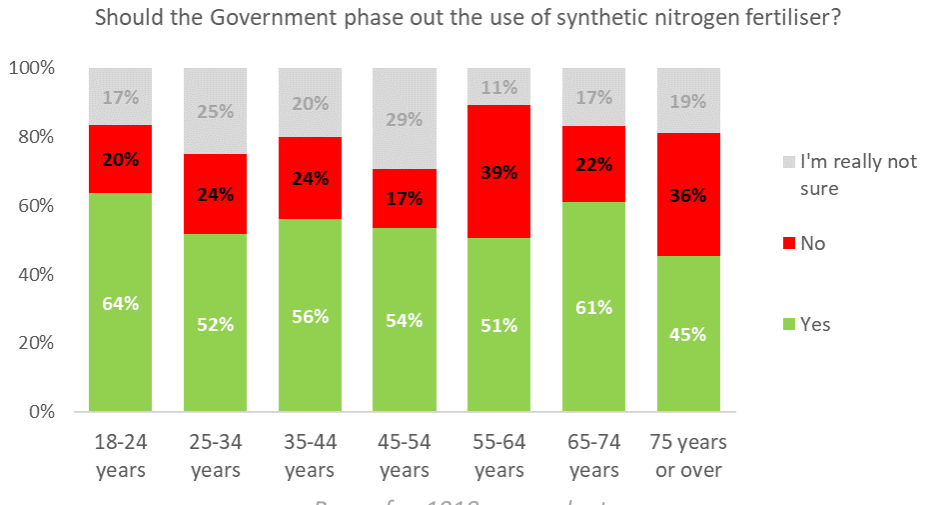
Of the few significant differences by demographics or personal characteristics:

- Females are more likely to support it (63% and males 45%).
- Superannuitants are less likely to be in favour of this phase-out (48%) but those who do still outnumber those who don't (33%).
- All age groups have higher numbers who support for the phase-out than those who oppose it.
- There is no trend by income (household or personal) nor by employment status.
- There are no significant differences by occupation or the industry someone works in.
- There is no significant difference by where someone lives.



Base of n=1018 respondents

Support for the phase-out is higher than opposition for every age group.



Base of n=1018 respondents

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There is no trend by income (household or personal) or employment status.

Superannuitants are less likely to be in favour of a phase-out (48%) but those who do still outnumber those who don't (33%). This is likely correlated with age, as can be seen on the graph above.

There are no significant differences by occupation, the industry people work in or where they live.

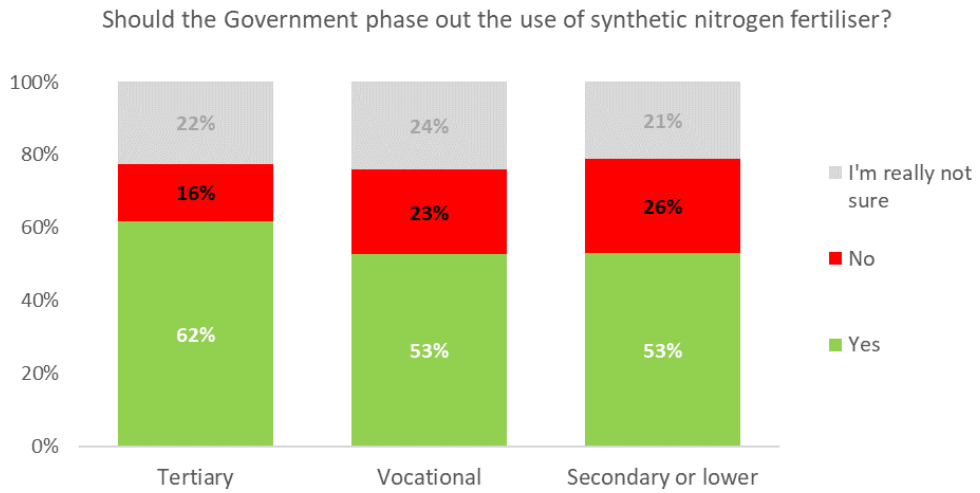
Support is significantly higher among Māori (66%), Indians (69%) and Asians (62%) than for the population overall (54%). Asians are also the ethnicity with the highest "I'm really not sure" result.

Phase-out of synthetic nitrogen fertiliser?	ETHNIC GROUP [7]						
	Asian	Indian	Māori	NZ European/ Pākehā	Other European	Pasifika	Other [8]
Yes	62%	69%	66%	54%	57%	50%	21%
No	12%	13%	16%	27%	22%	43%	48%
Unsure	27%	18%	19%	24%	21%	8%	31%
Sample size	*75*	*60*	*81*	*786*	*111*	*28*	*33*

[7] Small sizes for people who identify as Pasifika mean the result is indicative.
[8] Other may include African, South American and Middle Eastern.

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People with a tertiary qualification are also more supportive of a phase-out (62% compared to 53% of those without one.)



Base of n=1018 respondents

Green and Labour voters are strongly for a phase-out (86% and 64% respectively), while more ACT and National voters oppose than support it (47% and 39%).

Phase-out of synthetic nitrogen fertiliser?	2020 PARTY VOTE [9]			
	ACT	Green	Labour	National
Yes	35%	86%	64%	38%
No	47%	4%	15%	39%
Unsure	18%	10%	21%	22%
Sample size	*93*	*101*	*398*	*233*

[9] Only political parties with a sample size of over 50 are shown. Full results are included in the tables.

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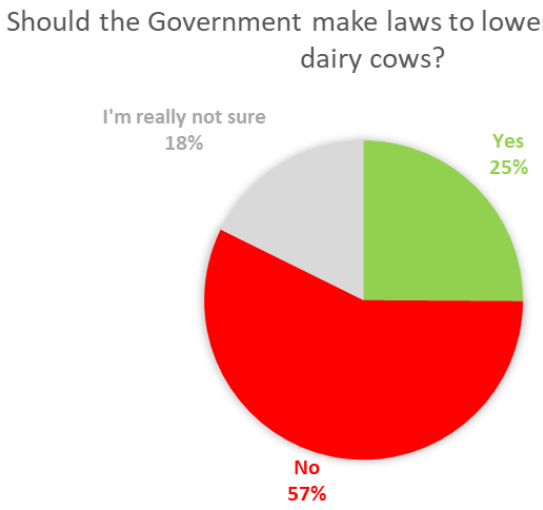
1.3 Number of cows

Most people are opposed to the Government making laws to lower the number of dairy cows (57%) although 25% support the idea and 18% are unsure.

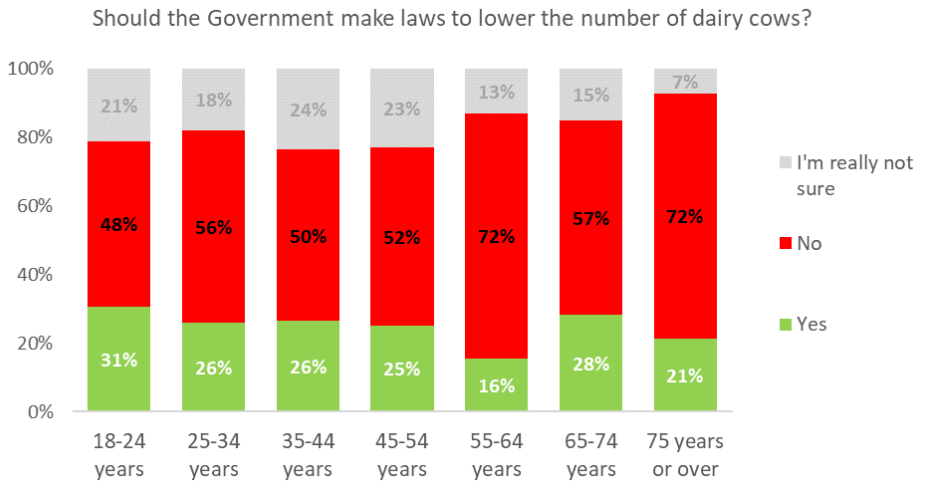
- 25% = 995,200 adults 18+ support the idea.
- 57% = 2,268,000 are opposed.
- 18% = 701,800 are unsure.

The policy idea is unpopular across the board.

- All genders are opposed to it.
- There is no difference by age, with the majority in all age-groups opposed to the idea.
- There is also no difference by income, either household or personal.
- Those with a tertiary education are more likely to support laws to lower the number, but those who say "no" still outweigh those who say "yes".
- There are no significant differences by ethnicity.
- Of the four parties in Parliament with sufficient sample size, only Green voters are supportive.



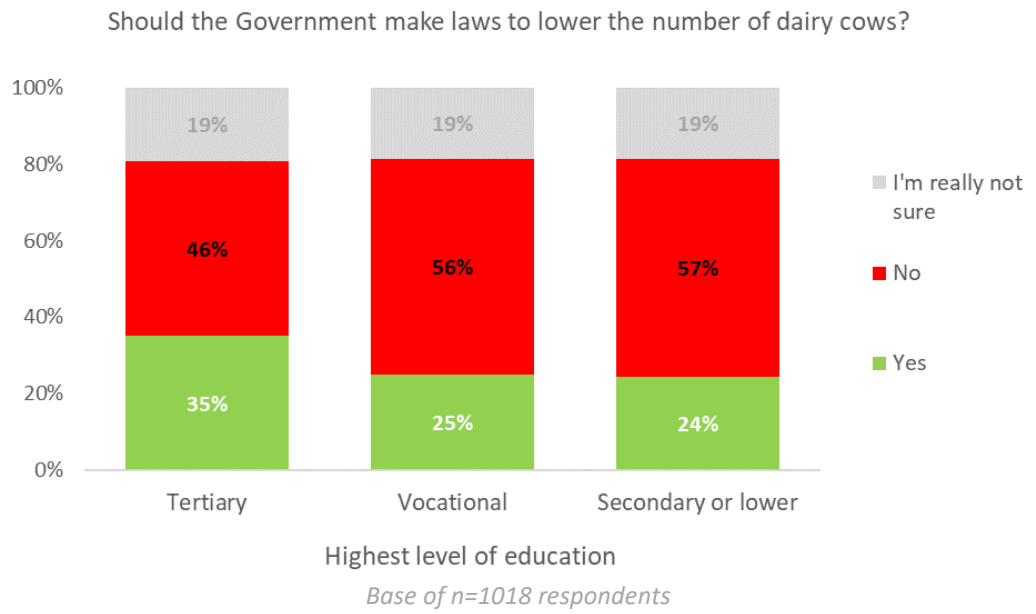
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Those with a tertiary education are more likely to support laws to lower the number, but those who say "no" still outweigh those who say "yes".



Base of n=1018 respondents

There are no significant differences by ethnicity, and of the four parties in Parliament with sufficient sample size, only Green voters support the idea.

Laws to reduce number of dairy cows?	2020 PARTY VOTE [10]			
	ACT	Green	Labour	National
Yes	11%	58%	30%	15%
No	84%	23%	48%	76%
Unsure	5%	19%	23%	10%
Sample size	*94*	*102*	*397*	*234*

By occupation or industry they are employed in, the least supportive are:

- Technical/ Mechanical/ Skilled Worker (18%).
- Unemployed/ Beneficiary (12%).
- People in the wholesale trade industry (2%).

There are no significant differences by where someone lives.

Those who are unsure

People who are unsure about the issue (18%) are more likely to be:

- Female (21%)
- Indian (34%)
- In households with children present (21%)
- Labour voters (23%)

[10] Only political parties with a sample size of over 50 are shown. Full results are included in the tables.

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2. APPENDIX – SAMPLE

These results are from a Horizon Research online survey conducted between 30 November and 6 December 2021. The total sample size was 1,022 adults, 18 years of age and over. Respondents are from Horizon's own panels and a third party research panel used for source diversity.

The data was weighted on age, gender, level of education, employment status, region and ethnicity to be representative of the adult New Zealand population at the 2018 census.

The maximum margin of error is ±3.1% (at the 95% confidence level) though this increases for any subgroup, as well as any comparison between subgroups.

Sub-sample respondent counts and margins of error are shown below.

	All respondents	
	Count	**Sub-sample margin of error**
TOTAL	**1022**	**±3.1%**
GENDER		
Male	560	±4.1%
Female	457	±4.6%
Another gender	5	
AGE GROUP		
18-24 years	84	±10.7%
25-34 years	209	±6.8%
35-44 years	188	±7.1%
45-54 years	192	±7.1%
55-64 years	89	±10.4%
65-74 years	106	±9.5%
75 years or over	154	±7.9%
ETHNIC GROUP		
Asian	75	±11.3%
Indian	62	±12.4%
Māori	81	±10.9%
NZ European/ Pākehā	787	±3.5%
Other European	112	±9.3%
Pasifika	28	±18.5%
Other	34	±16.8%

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