



Dairying Environment Survey

November 2022

Prepared for
Greenpeace



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EXECUTIVE SUMMARY

Approach

These results are from a Horizon Research survey conducted between 14 and 20 November 2022. The total sample size was 1,088 adults, 18 years of age and over.

The maximum margin of error is $\pm 3\%$ (at the 95% confidence level). The data was weighted on age, gender, level of education, employment, region and ethnicity to be representative of the adult New Zealand population at the 2018 census.

The report compares results with a December 2021 survey asking the same questions.

Summary

Most New Zealanders are in favour of regulating dairying to achieve cleaner waters and reduce greenhouse gas emissions and to phase out synthetic nitrogen fertilizer.

61% favour regulating to reduce water contamination and greenhouse gas emissions, which is a significant increase from **48%** in December 2021.

A majority (**55%**) support phasing out synthetic nitrogen fertiliser.

Although not the majority, there is increasing support for the Government to introduce laws to lower the number of dairy cows.

REPORT

1. Dairying

There is widespread support for regulating dairying to achieve cleaner waters and reduce greenhouse gas emissions and to phase out synthetic nitrogen fertilizer.

Although not a majority, there is increasing support for the Government to introduce laws to lower the number of dairy cows.

- **61%** of New Zealanders favour regulating to reduce water contamination and greenhouse gas emissions, which is a significant increase from **48%** in December 2021.
- A majority (**55%**) support phasing out synthetic nitrogen fertiliser.
- In December 2021 **51%** opposed passing laws to lower the number of dairy cows in the country. This has dropped to **44%** and in November 2022, **33%** support the idea (significantly up from **25%**)

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.

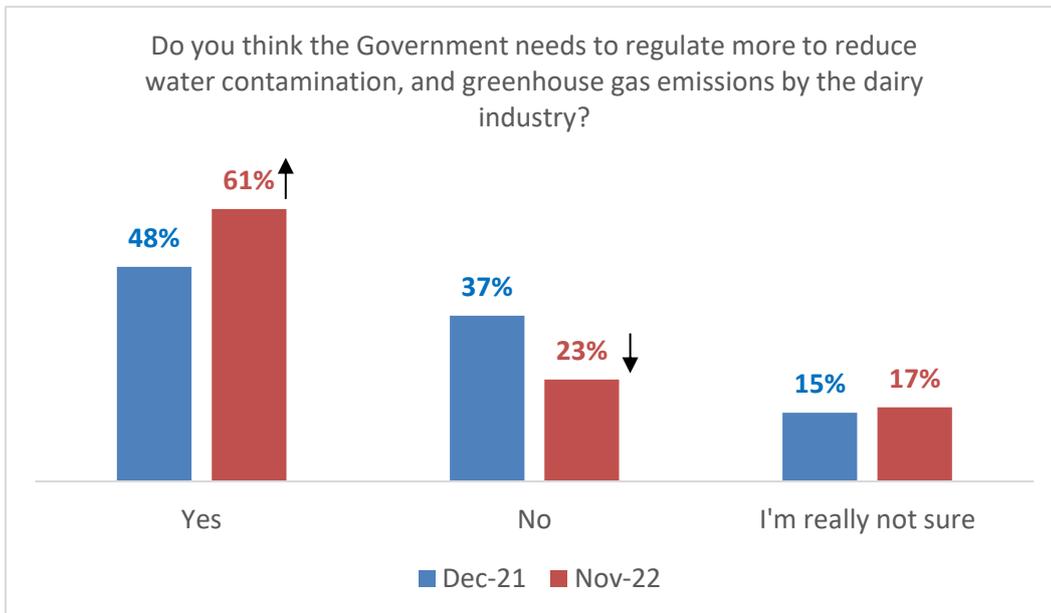
Some argue that the government must do more to stop climate pollution and contamination of New Zealand waterways caused by intensive dairy farming, by cutting the use of synthetic nitrogen fertiliser and reducing the numbers of dairy cows.

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.

1.1 Government regulation

The support for **Government to regulate more to reduce water contamination and greenhouse gas emissions** has increased significantly over the past year.

- **61%** (2,408,000 adults) are now in favour versus **48%** in December 2021.
- **23%** (900,700 adults) oppose, which is a significant drop from December 2021.
- **17%** (655,000) are unsure



KEY ↑↓ Significant change from Dec 2021. Sample size: Dec 2021 n=1022; Nov 2022 n=1088

Groups **more** likely to support more regulation are:

- Younger people
- Employed
- Asians
- Higher income households
- Households with children
- People living in bigger cities
- People with tertiary qualifications
- Green Party, Te Pāti Māori and NZ First voters.

More likely to support (answered "yes")	Nov 2022
18-24 year olds	82%
25-34 year olds	78%
Employed	67%
Asian	70%
Children in household	68%
Live in Auckland/Wellington or Christchurch	67%
Household income >\$150k	73%
Personal income \$50k-\$150k	68%
University Education	80%
Green Party voter	87%
Te Pāti Māori voter	93%
NZ First voter	73%

Groups **less** likely to support more regulation are:

- 55+ year olds (37%)
- Retirees (29%)
- No children in household (28%)
- National voters (46%).

There were significant shifts in support across some age groups:

- 82% of 18-24 year olds say they support more regulation versus 63% in December 2021
- Support among 25-34 year olds increased by 21% from 57% in December 2021 to 78% in November 2022
- 45-54 year olds support increased 15%
- 55-64 year olds support increased 18%.

Support regulation	Dec-21	Nov-22	% change from Dec-21
18-24 years	63%	82%	+19% ↑
25-34 years	57%	78%	+21% ↑
35-44 years	59%	65%	+6%
45-54 years	46%	61%	+15% ↑
55-64 years	29%	46%	+18% ↑
65-74 years	41%	42%	+2%
75 years or over	33%	42%	+9%

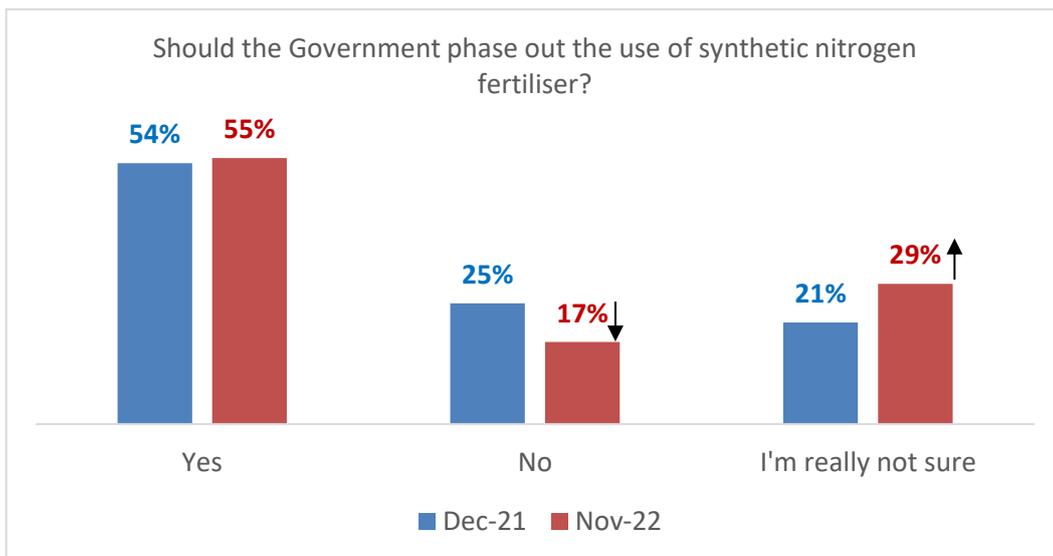
KEY ↑ ↓ Significant change from Dec 2021.

1.2 Synthetic nitrogen fertiliser

A majority thinks the Government should **phase out the use of synthetic nitrogen fertiliser (55%)**, which is similar to the level of support in December 2021.

The number of people opposing the phase out has decreased significantly from **25%** in December 2021 to **17%** in November 2022. The number of people who are unsure has increased significantly from **21%** to **29%**.

- 55% in favour of a phaseout equivalent to 2,182,300 adults
- 17% opposed = 674,500
- 29% unsure = 1,150,600.



KEY ↑↓ Significant change from Dec 2021. Sample size: Dec 2021 n=1022; Nov 2022 n=1088

Across the groups there are some significant differences in support of phasing out synthetic nitrogen fertiliser.

People **more** likely to support the phase out are:

- 18-24 year olds (67%)
- Personal income above \$150k a year (75%)
- Green Party Voter (74%)
- Te Pāti Māori voter (74%).

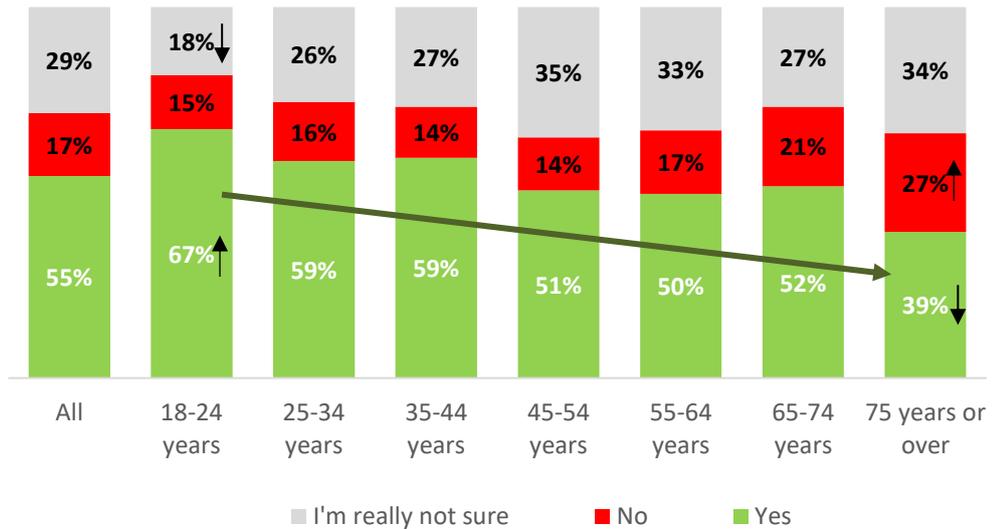
People **less** likely to support the phase out are:

- 75+ year olds (27%)
- Bay of Plenty residents (29%)
- People working in Agriculture or Forestry (32%)
- National Party Voters (32%).

The chart below shows the differences across age groups and support of phasing out synthetic nitrogen use. Support starts to decline among older age groups.

The number of people who are unsure also starts to increase among older age groups.

Should the Government phase out the use of synthetic nitrogen fertiliser?



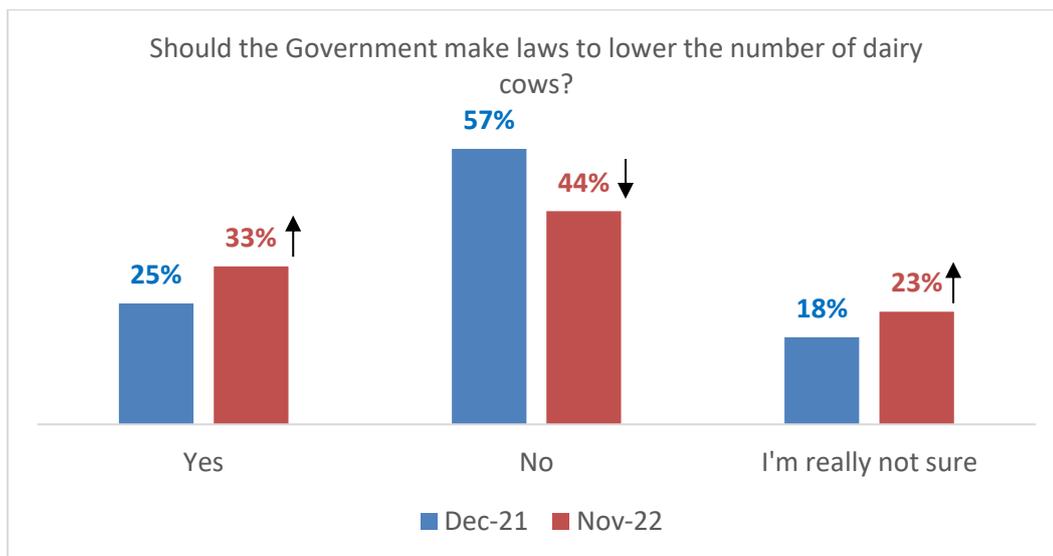
KEY ↑↓ Significantly higher or lower than total sample. Sample size: Nov 2022 n=1088

1.3 Number of cows

The number of people **supporting the Government making laws to lower dairy cow numbers** has increased significantly since December 2021 from **25%** to **33%** in November 2022.

The number of people who oppose has dropped significantly from **57%** to **44%** and there is also a significant increase in the number who are not sure (**18%** to **23%**)

- 33% = 1,297,500 adults 18+ support the idea
- 44% = 1,749,800 are opposed
- 23% = 924,500 are unsure.



KEY ↑↓ Significant change from Dec 2021. Sample size: Dec 2021 n=1022: Nov 2022 n=1088

The policy idea is gaining support and the people **more** likely to support it are:

- Younger people
- Employed
- Asians
- People with higher income
- People living in bigger cities
- People with tertiary qualifications
- Green Party, Te Pāti Māori and ACT voters.

More likely to support (answered "yes")	Nov 2022
25-34 year olds	48%
35-44 year olds	42%
Asian	48%
Household income >\$150k	44%
Personal income \$50k-\$100k	60%
Personal income \$100k-\$150k	62%
Has Post graduate degree	48%
Qualification up to Uni Bursary/7 th form	52%
Live in Auckland/Wellington or Christchurch	39%
Work in Manufacturing	45%
ACT voter	44%
Green Party voter	48%
Te Pāti Māori voter	78%

Groups **less** likely to support the policy are:

- 55+ year olds (57%)
- Household income \$30k-\$50k (53%)
- No children in household (51%)
- National voters (67%).

There were significant shifts in support across some age groups:

- 25-34 year olds – 26% in December 2021 to 48% in November 2022
- 35-44 year olds - 26% in December 2021 to 42% in November 2022.

Support policy	Dec-21	Nov-22	% change from Dec-21
18-24 years	31%	36%	+5%
25-34 years	26%	48%	+22% ↑
35-44 years	26%	42%	+16% ↑
45-54 years	25%	27%	+2%
55-64 years	16%	22%	+6%
65-74 years	28%	26%	-2%
75 years or over	21%	20%	-1%

KEY ↑ ↓ Significant change from Dec 2021.

APPENDIX – SAMPLE

These results are from a Horizon Research online survey conducted between 14 and 20 November 2022. The total sample size was 1,088 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, education, employment, ethnicity and region to be representative of the adult New Zealand population at the most recent census.

The maximum margin of error is $\pm 3\%$ (at the 95% confidence level).

Data was compared with results from a December 2021 survey. The sample size for December 2021 was 1,022 with a margin of error of $\pm 3.1\%$.

November 2022 sub-sample respondent counts and margins of error are shown below.

	All respondents	
	Count	Sub-sample margin of error
TOTAL NOV 2022	1088	$\pm 3\%$
<u>GENDER</u>		
Male	529	$\pm 4.3\%$
Female	556	$\pm 4.2\%$
Another gender	3	
<u>AGE GROUP</u>		
18-24 years	124	$\pm 8.8\%$
25-34 years	204	$\pm 6.9\%$
35-44 years	188	$\pm 7.1\%$
45-54 years	188	$\pm 7.1\%$
55-64 years	167	$\pm 7.6\%$
65-74 years	124	$\pm 8.8\%$
75 years or over	88	$\pm 10.4\%$
<u>ETHNIC GROUP</u>		
Asian	101	$\pm 9.8\%$
Indian	38	$\pm 15.9\%$
Māori	146	$\pm 8.1\%$
NZ European/ Pākehā	760	$\pm 3.6\%$
Other European	84	$\pm 10.7\%$
Pasifika	39	$\pm 15.7\%$
Other	28	$\pm 18.5\%$