

Beliefs and Values Research: Urban and rural perspectives of the primary sector

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I. Introduction

1.1 Background

This research was commissioned by the Ministry of Agriculture and Forestry (MAF) under its operational research programme.

As outlined in MAF Policy's Strategic Plan, in developing policy advice and service delivery to Government MAF seeks to help create prosperous, sustainable and innovative agriculture, food and forestry sectors that support a vibrant and healthy New Zealand society, environment and economy.

One of MAF Policy's three main objectives is that "our policy development on environmental management and economic growth will create social and cultural benefits and acknowledge and minimise damaging trade-offs".

Among other measures, MAF seeks to achieve this objective by:

- Researching changing beliefs and values as they relate to the way people interact with the agriculture, food and forestry sectors
- Raising awareness of the important role of the sectors and rural production systems in an increasingly urbanised society.

The business environment has a major impact on the sectors' contribution to economic, environmental and social outcomes. While many parts of the sectors are rural-based, the regulatory and policy environment is largely driven by the perspectives of urban people - as voters, lobbyists, officials and consumers. Rural perspectives (spanning the continuum from values to technical implementation details) may not be adequately considered during policymaking.

There is a risk that the agricultural, food and forestry sectors' practices will become significantly out of step with societal beliefs and values, and significant and destabilising changes will be required to better align the sectors' practices. Gradual, voluntary, dynamic changes to the sectors' practices, where appropriate, are preferred.

To achieve these objectives MAF needs to build a better understanding of changing beliefs and values (within both urban and rural societies) and how they relate to the sectors and rural New Zealand. This is particularly important in the context of an increasingly urbanised New Zealand society.

This benchmark study seeks to inform the above processes and provide an insight into both urban and rural New Zealanders' perceptions of each other and all New Zealanders' beliefs and values as they relate to the agricultural, food and forestry sectors.

1.2 Objectives

The overall objective of the research was to gain an accurate understanding of the changing nature of rural and urban New Zealanders' beliefs and values to assist the agriculture, food and forestry sectors to better align practices and raise awareness of their sectors.

The specific objectives of this study were:

- To gain an in-depth understanding of views of urban and rural New Zealanders
- To gain an in-depth understanding of beliefs and values held (across both urban and rural New Zealanders) regarding the agricultural, food and forestry sectors
- To explore and identify pathways in the development of beliefs and values
- To quantify views of rural and urban New Zealanders across a range of key measures.

1.3 Methodology

1.3.1 Qualitative stage

Six focus groups were conducted between 7 and 9 April 2008 across the following audiences:

- Auckland – urban
 - 1x opinion leaders
 - 1x general public
- Canterbury – urban/ rural
 - 1x general public (Christchurch – urban)
 - 1x general public (Canterbury – rural, high urban influence)
- Whakatane – rural
 - 1x general public (mix of rural areas, moderate urban/ low urban influence)
- Hawera – rural
 - 1x general public (mix of rural areas, low urban influence, remote).

All groups included a mix of gender and age.

1.3.2 Quantitative stage

■ Question design

This report was based on a CATI telephone survey of a nationally representative sample of 750 New Zealanders, 18 years of age and over. An additional booster sample of n=493 rural respondents was used to produce a total sample of n=1,243.

Fieldwork was conducted from 20th May to 8th June 2008 at UMR Research's national interview facility in Auckland.

■ The sample

The nationwide sample population was stratified into 23 telephone directory regions. The number of residential addresses in each of these regions was determined and a quota then specified as to the proportion of the sample that must fall in each region.

STRATIFIED SAMPLE BY TELEPHONE REGION			
		%	750
01	Auckland 1	5.1%	38
02	Auckland 2	4.1%	31
03	Auckland 3	7.4%	55
04	Auckland 4	7.4%	55
05	Auckland 5	4.5%	34
06	Auckland 6	2.1%	16
07	BOP	7.1%	53
08	Christchurch	12.3%	92
09	Gisborne	1.0%	7
10	Hawkes Bay	4.0%	30
11	Manawatu	3.6%	27
12	Marlborough	1.2%	9
13	Nelson & Bays	2.5%	19
14	Northland	3.4%	25
15	Otago	4.7%	35
16	Southland	2.7%	20
17	Taranaki	2.8%	21
18	Timaru & Oamaru	2.2%	17
19	Waikato	8.1%	61
20	Wairarapa	1.3%	10
21	Wanganui	1.6%	12
22	Wellington	10.3%	77
23	West Coast	0.9%	6
Total		100%	750

Additionally, the rural component of this project was stratified as outlined in the following table. The definitions were provided by Statistics New Zealand and were applied by assigning the appropriate meshblock number to each respondent called.

STRATIFIED SAMPLE BY STATISTICS NEW ZEALAND RURAL DEFINITIONS			
		%	N=635
	North Island		
1	Rural area with high urban influence	14	87
2	Rural area with moderate urban influence	18	114
3	Rural area with low urban influence	28	178
4	Highly rural/remote area	7	45
	Total rural – North Island	67	424
	South Island		
5	Rural area with high urban influence	4	28
6	Rural area with moderate urban influence	8	49
7	Rural area with low urban influence	14	88
8	Highly rural/remote area	7	46
	Total rural - South Island	33	211
TOTAL RURAL – NORTH/ SOUTH ISLAND		100	635
Weighted to Statistics New Zealand Census data (2001)			

During the piloting stage it became evident that respondents that were classified as living in a rural or urban area according to Statistics New Zealand meshblock data did not necessarily agree with this categorisation. A question was added to the survey asking respondents to categorise themselves as either rural or urban (living in a city or town) residents, if there was a conflict between this category and the meshblock data, respondents were re-allocated as rural or urban based on their chosen category.

■ Sub-samples

Booster Sample – Rural New Zealanders

Of the 750 New Zealanders surveyed, 142 resided in rural areas. A further sample of 493 rural respondents was surveyed, providing a total of 635 rural respondents.

Urban New Zealanders

A sub-sample of urban respondents is also referred to in the report. The sub-sample of urban respondents comprised 608 urban New Zealanders.

■ **Weighting regime**

The survey data was rim weighted by age, sex and household size. Rim weighting is designed to weight characteristics simultaneously. The rim weighting process attains all the desired proportions while distorting each variable as little as possible.

Rim weighting calculates weights using a form of regression analysis. This requires two parameters: a 'limit', which defines how close the weighting procedure must get to the targets that have been set in order for the weights to be acceptable, and a number of 'iterations', which defines the number of times the weight calculations may be repeated in order to reach the cell targets.

For the general public sample the Rim Weighting Efficiency figure was 90.3%, indicating that the sample collected closely matched the actual population.

For the rural sample the Rim Weighting Efficiency figure was 82.8%, indicating that the sample collected was a good match to the actual population.

■ **The telephone sampling scheme**

The random sample of telephone numbers was generated from all number ranges found in Telecom's White Pages for New Zealand.

To limit the sample frame to "private households with telephones", the following types of telephone numbers were filtered out of the sample:

- Telecom Yellow Pages
- Disconnected or fax lines
- Where the interviewer determines that contact is not a private household
- Business lines.

■ **Margin of error**

The margin of error for a 50% figure at the '95% confidence level' for the sample of 750 is plus or minus 3.6%.

The margin of error for a 50% figure at the '95% confidence level' for the sub-sample of 608 urban respondents is plus or minus 4.0%.

The margin of error for a 50% figure at the '95% confidence level' for the booster sample of 635 rural respondents is plus or minus 3.9%.

■ **Call-back and calling times**

Up to five call-backs were made to initially selected respondents to ensure that non-response had a minimal impact on the representativeness of the sample. Appointments were made to ring back respondents if the time they were first contacted was not convenient.

Respondents were called from 5.30pm to 9.00pm during the week, from 9.30am to 6.00pm on Saturday and from 9.30am to 9.00pm on Sunday.

■ **Rotated responses**

In order to eliminate order effects, response lists and statements were rotated where possible.

■ **Multivariate analysis**

Some multivariate analysis was undertaken of the survey results.

Cluster analysis

Factor scores were derived from each major section of the survey, such as connection with any of the sectors or responses to particular topics in the survey. These factor scores were used to perform the cluster analysis.

The clustering method used in this analysis is K-Means. This procedure attempts to identify relatively homogeneous groups of cases based on selected characteristics, using an algorithm that can handle large numbers of cases. K-Means Cluster Analysis has two specific goals; firstly to minimise the variability within clusters, and secondly to maximise variability between clusters. It should be noted that cluster analysis is not a statistical test. Rather, cluster analysis methods are used to organise the data into meaningful groups.

■ **Definitions**

Specific groups are referred to throughout this report and are outlined below.

Respondents

This refers to the representative general public sample of n=750.

Urban New Zealanders

This refers to the sub-sample of urban respondents of n=608.

Rural New Zealanders

This refers to the total sample of rural respondents of n=635.

II. Executive Summary

2.1 Overview

- Views of rural New Zealand are generally positive. Overall, this view appears to be improving, with nearly a third saying their view had become more positive over the past five years. Across a range of questions, urban New Zealanders generally exhibited support for rural New Zealand and, in particular, a significant proportion of urbanites were willing to subsidise services to rural New Zealand.
- When asked to nominate positives and negatives about urban and rural New Zealand there were similar issues raised by urban and rural respondents for the positives (although there were some higher scores on aspects of rural life such as the landscape among urban respondents), however, there were more significant differences on the negatives raised, which may be due to rural New Zealanders' actual experience of rural life and some level of self interest.
- While the importance of the rural sector was acknowledged by the majority of urban respondents, only a small proportion of rural respondents acknowledged the importance of the urban sector.
- There were reasonable levels of declared connection between urban and rural New Zealand, with nearly a third having moved after growing up in either a rural or urban environment. There were also around 40% of urban respondents who knew people who worked rurally or regularly visited people in rural New Zealand.

The three sectors tested in-depth – the farming, horticulture and forestry sectors – were viewed positively. Farming was clearly viewed most positively and was a sector where New Zealand was viewed as a world leader. However, there were some areas of concern regarding the sectors that may impact on future perceptions, mainly in the area of environmental management.

There were some indications that sustainability is a growing issue for New Zealanders. Most New Zealanders felt that expansion of the farming, horticulture and forestry sector was good for New Zealand. However, younger New Zealanders were less convinced. Issues relating to sustainable practices were also raised in relation to key environmental concerns and there was also reasonable support for more regulations and greater enforcement of regulations to protect the environment.

- Respondents were not totally convinced that New Zealanders recognise the importance of water, with only half believing that we do. There was also uncertainty over whether the agriculture and horticulture sector make good use of water.

- A number questioned the cause of climate change, with nearly half of respondents believing natural weather cycles are more important in determining climate change than anything people do.

There was reasonable support for New Zealand taking an international lead on climate change and the key causes of domestic climate change were seen to be industry, vehicles and farm animals.

- There was reasonable support for buying New Zealand made goods. However, around a third of respondents stated a preference for having the full range and choice of food regardless of its origin.

Respondents were polarised on whether locally produced food sold in New Zealand is as good as food that is exported.

- A majority believed farmers treat their animals well. However, respondents were more divided over whether most farmers would put caring for animals ahead of making money. Animals seen to be most poorly treated were poultry and pigs.

2.2 Views of urban and rural New Zealand

➤ Current views of urban and rural New Zealand

- Positives raised about rural and urban New Zealand were generally consistent across rural and urban respondents, however, there were more significant differences recorded in the negatives raised.

While the key negative associated with urban New Zealand for rural respondents was a dislike of large populations, for urban respondents it was the traffic.

For urban New Zealanders the main negatives about living in a rural area were the distance from facilities, services and people and the isolation, while for rural respondents the key negative was the perceived high cost of living.

➤ **Changing views of rural New Zealand**

- Most respondents felt that their view of rural New Zealand had remained unchanged over the past five years, however, more (28%) felt their view had become more positive than those whose view had become more negative (10%). Rural New Zealanders were less likely to have a view that remained unchanged and recorded significantly higher proportions, with both a more positive and a more negative view.

Across rural and urban respondents the perceived lifestyle and success of farming were the key reasons for holding a more positive view. Improved knowledge of the sector was more likely to be raised by urban respondents, while a closer community was more likely to be raised by rural respondents for holding a more positive view.

Concerns about the direction of farming in New Zealand was driving the more negative view of rural New Zealand.

➤ **Value of urban and rural New Zealand**

- While rural respondents question whether urban dwellers understand the importance of rural New Zealand, this does not appear to be the case for urban dwellers. A majority of urban New Zealanders agree that 'if the rural sector is doing well people in the urban sector will be better off'. No groups recorded significantly lower scores.

However, in a converse question, only a minority of rural New Zealanders were convinced of the importance of urban New Zealand.

➤ **Services to New Zealand**

- There was strong support across both urban and rural respondents for providing services to rural areas regardless of the cost. Half of urban respondents agreed that they did not mind paying a bit more for services if this means rural people can access them at a reasonable cost, while around a third were uncertain (nominating a neutral or unsure response).

2.3 Connections to rural New Zealand

➤ **Place of birth, work and childhood**

- The majority of respondents in paid occupations work in urban New Zealand. Even among rural residents, over a third either work in urban New Zealand or their work involves working in both the urban and rural environment.

- 76% of urban respondents and 85% of rural respondents were born in New Zealand. A higher proportion of those born overseas reside in Auckland, are on higher incomes and are from non-New Zealand European backgrounds.
- There appeared to be a reasonable flow of urbanites moving to live rurally and vice versa. Just under a third of urban respondents grew up in rural New Zealand. There were no differences recorded by age, however, Aucklanders were less likely to claim to have grown up in rural New Zealand.

A similar number of rural respondents claimed to have grown up in urban New Zealand.

➤ **Links with rural New Zealand**

- 42% of urban New Zealanders claim to often visit family or friends who live in a rural area. There was no significant difference across age groups.
- 40% of urban New Zealanders claimed to have family or close friends who work in the farming sector, 21% in the horticulture sector and 14% in the forestry sector. Older urban dwellers were less likely to have family or friends who work in farming or forestry, as were Aucklanders and those born overseas.

As expected, personal connection to these three sectors was higher among rural New Zealanders.

- 22% of urban New Zealanders claimed to have worked at some stage in the farming sector, 18% in the horticulture sector and 8% in the forestry sector. There were no differences recorded by age across the farming or horticulture sector, however, younger urbanites were more likely to claim they had worked in forestry.

Understandably, rural New Zealanders recorded a higher likelihood of working in these sectors.

2.4 Living and working in rural New Zealand

- Urban dwellers were more likely to contemplate moving to rural New Zealand than rural dwellers would consider moving to an urban area.

Around a quarter of New Zealanders who live and work in urban areas claimed they would seriously consider moving to live rurally. Those with some sort of connection to rural New Zealand were more likely to consider a rural life.

A similar proportion of urbanites would consider working in rural New Zealand. Of those interested in working rurally, farming was the most appealing sector to work in.

- It would be easier to convince those living rurally but working in an urban centre to switch to a rural job, with much higher levels of interest shown across this audience.
- There was very low interest shown by rural residents in moving to live or work in an urban area. In the focus groups the greatest appeal of urban life was potentially better job opportunities.

2.5 View of the sectors

➤ Significance of sectors

- Consistent with the focus groups, the farming sector was seen as the most significant sector for generating income for New Zealand (87%), followed by tourism (79%), forestry (61%), horticulture (60%), energy (49%), manufacturing (47%), fishing (47%) and the film industry (33%).

Rural respondents were less likely to rate the contribution of tourism, forestry, fishing and the film industry as significant.

➤ View of sectors

- While the farming, tourism, horticulture and forestry sectors were all generally viewed positively, respondents were most positive towards farming and tourism.

Rural New Zealanders viewed the farming sector more positively than urban New Zealanders and were less likely to view the tourism and forestry sector positively.

- While urban and rural New Zealanders held similar views on the positives associated with the farming, forestry and horticulture sectors, there were some differences across the negatives raised.
- Both urban and rural respondents nominated poor environmental management as a key negative regarding the farming sector. Rural respondents were less likely to view farming as profit driven and were more likely to raise the high cost of doing business as a negative.
- Poor environmental management was also the key issue of concern regarding the forestry sector for both urban and rural respondents. Rural respondents were also more likely to view the sector as underperforming.
- While urban and rural respondents cited the horticulture sector's underperformance as the key negative, rural respondents were more likely to also cite poor environmental management and being poor employers as reasons for holding a negative view.

➤ **World leaders in sectors**

- New Zealand was clearly seen to excel in the farming sector but respondents were less convinced about performance in the forestry and horticulture sectors. Respondents not born in New Zealand were less likely to view New Zealand as a world leader in farming and forestry.

Rural New Zealanders were more likely to agree that 'New Zealand is a world leader in farming' and less likely to agree that 'New Zealand is a world leader in forestry'.

➤ **Sustainability of sectors**

- Most New Zealanders felt there was some room for expansion of the farming, horticulture and forestry sectors. There appeared to be a general trend by age, with younger respondents less likely to view expansion of any of the sectors positively while older respondents were more likely.

2.6 Environmental issues

➤ **Important environmental issues**

- Key environmental concerns were pollution, climate change, the need to implement sustainable practices and the disposal of waste. Rural respondents were less likely to nominate climate change and the need to employ sustainable practices as key concerns and more likely to nominate water use.

➤ **Regulations to protect the environment**

- Nearly half of all respondents wanted more regulations to protect the environment and only a tenth wanted fewer. Rural New Zealanders were less likely to want more regulations.
- Views on the enforcement of regulations were similar, with around half of respondents believing that regulations are not enforced strongly enough and around a tenth believing regulations are enforced too strongly. Rural New Zealanders were less likely to believe regulations were not enforced strongly enough.

➤ **Water use**

- Respondents were not totally convinced that New Zealanders recognise the importance of water, with only half believing that we do. Endorsing this view was another question that found that a significant proportion of respondents (41%) felt that New Zealand has plenty of water to meet its needs. Rural and urban respondents recorded similar scores on these indicators.

- A majority (58%) supported people paying for the water they use, however, rural respondents were less likely to support this stance.
- There was some uncertainty over the use of water by the agriculture and horticulture sector, with only just over a third of respondents believing that agriculture and horticulture make good use of water, 37% giving a neutral response and 19% believing they do not make good use of water. Rural respondents did not record significantly different scores on this indicator.

➤ **Climate change**

- A number questioned the cause of climate change, with nearly half of respondents believing natural weather cycles are more important in determining climate change than anything people do. Rural New Zealanders were more likely to agree with this view.
- There was reasonable support for New Zealand taking an international lead on climate change, but rural New Zealanders were less keen to see this happen.
- There was also a minority who felt that there is nothing a small country like New Zealand can do about global warming.
- Internationally, the biggest causes of climate change were seen to be industry and vehicles. While industry and vehicle use were key causes of domestic climate change, farm animals also rated quite strongly as a reason for domestic climate change. Rural New Zealanders were slightly less likely to nominate vehicles and farm animals.

2.7 Buying local goods

- There was reasonable support for buying New Zealand made goods. Rural New Zealanders were more likely to claim to be patriotic purchasers. Younger rural respondents were less likely.
- Respondents were polarised on whether locally produced food sold in New Zealand is as good as food that is exported. Rural New Zealanders recorded similar views to the general population.
- Around a third of respondents stated a preference for having the full range and choice of food regardless of its origin. Rural New Zealanders were less likely to prefer to have the full range of food whether it was grown in New Zealand or not.

2.8 Animal welfare

- A majority believed farmers treat their animals well. However, respondents were divided over whether most farmers would put caring for animals ahead of making money. Rural New Zealanders were more likely to believe farmers treat animals well and put animal welfare before profit.
- The animals seen to be most poorly treated were poultry and pigs, with mistreatment commonly related to crowded living conditions and lack of food or water.
- Most respondents believed that animals that live outside are healthier and have a better life. Rural respondents were more likely to believe outside life was better for animals.

2.9 Segmentation analysis

- Additional multivariate analysis was undertaken to identify segments within the general public population according to their responses in the quantitative survey. Factor scores were derived from each major section of the survey, such as connection with any of the sectors or opinions on a particular issue and were used to identify relatively homogeneous groups based on common characteristics.

Four general public segments were identified and are outlined below.

Rural advocates (22%): This segment was most positive towards rural New Zealand and tended to have strong ties with, or live in, rural New Zealand. This segment exhibited lower concern about water issues. They were more likely to be male, younger and born in New Zealand.

Rurally unconnected advocates (27%): This segment had very positive views of the three sectors tested in the research. They claimed to make more effort to buy New Zealand made goods, were not that concerned about water issues and rated farmers highly on animal welfare. They were more likely to be female, older, on lower incomes and have little connection with rural New Zealand.

Provincial cynics (19%): This segment had less positive views of the three sectors. They want fewer regulations to protect the environment and do not want New Zealand to take a lead role in combating climate change. They made no special effort to buy New Zealand made goods, were unconcerned about water issues and believed that the food sold in New Zealand is as good as that exported. They were more likely to be older, retired, live in provincial New Zealand and have little connection with rural New Zealand.

Rurally unconnected cynics (32%): This segment was more cynical towards the practices employed by the farming and horticulture sector. They were less likely to believe farmers put caring for animals ahead of money and that the agriculture and horticulture sectors made good use of water. They believed New Zealand can take action on climate change even though we are small and were concerned about water issues. They were more likely to be middle-aged, in professional occupations, on higher incomes, Aucklanders, to be born overseas and to have little connection with rural New Zealand.

III. Views of Urban and Rural New Zealand

3.1 Chapter overview

- Positives raised about rural and urban New Zealand were generally consistent across rural and urban respondents, however, there were a number of differences recorded in the negatives.

While the key negative associated with urban New Zealand for rural respondents was a dislike of large populations, for urban respondents it was the traffic.

For urban New Zealanders, the main negatives about living in a rural area were the distance from facilities, services and people and the isolation, while for rural respondents the key negative was the perceived high cost of living.

- Most respondents felt that their view of rural New Zealand had remained unchanged over the past five years, however, more respondents (28%) felt their view had become more positive than more negative (10%). Rural New Zealanders were less likely to have a view that remained unchanged and recorded significantly higher proportions with both a more positive and a more negative view.

The perceived lifestyle, success of farming and improved knowledge of the sector were the key reasons for holding a more positive view. A closer community was more likely to be raised by rural respondents as a reason for holding a more positive view.

Concerns about the direction of farming in New Zealand drove the more negative view of rural New Zealand.

- While rural respondents questioned whether urban dwellers understand the importance of rural New Zealand, this does not appear to be the case for urban dwellers. A majority (64%) of urban New Zealanders agreed that 'if the rural sector is doing well people in the urban sector will be better off'.

However, in a converse question, only a minority of rural New Zealanders were convinced of the importance of urban New Zealand.

- There was strong support for providing services to rural areas regardless of the cost across both urban (74%) and rural (73%) respondents. Around half of urban respondents agreed that they did not mind paying a bit more for services if this means rural people can access them at a reasonable cost, while around a third were uncertain about this issue (nominating a neutral or unsure response).

■ Key demographic differences

- Rural and urban respondents gave similar positives regarding rural and urban New Zealand but differed on the negatives.
- Higher proportions of rural respondents have a more positive and a more negative view of rural New Zealand.
- No significant differences were recorded across sub-groups of urban New Zealanders in regard to the importance of rural New Zealand.
- Rural respondents were less keen to pay the true costs of providing services.

3.2 Current views of urban and rural New Zealand

In the focus groups participants were asked to write down their first thoughts when they considered both urban and rural New Zealand. In this context it was clear that top-of-mind imagery associated with rural New Zealand was generally positive, with many of the traits seen to embody the ideal 'spirit of New Zealand'.

[Rural?] How New Zealand should be or has been. Why try and change it when it doesn't need mending or anything like that? (Whakatane, rural, male)

Participants in the focus groups were also asked to write down what they associate with rural New Zealanders. There were many iconic images and personalities linked with rural New Zealanders, mostly portraying positive traits and unique 'Kiwi' characteristics.

I think the rural attitude is very positive. It's like a utopian ideal, where each person would have an idea to benefit everyone, whereas if you come to the city it's much more about me. (Auckland, general public, male)

In contrast the majority of top-of-mind imagery associated with urban New Zealand was negative.

An isolation amongst large crowds. The idea that a person living in a large population can still feel quite isolated and a disassociation. A large society with hundreds of people that don't seem to connect with each other. (Christchurch, urban, male)

This trend of viewing rural New Zealand positively and urban New Zealand negatively was consistent across both the urban and rural focus groups. While this indicates that views are similar among urban and rural New Zealand, it also highlights a huge gulf in perception, which needs to be taken into account when managing urban and rural issues.

3.3 Views of urban New Zealand

In the quantitative survey respondents were asked to nominate both the good things and bad things about urban New Zealand.

3.3.1 Good things about urban New Zealand

Respondents were asked to state, in their own words, what they believed are the good things about urban New Zealand.

Perceived positives of urban New Zealand were similar for urban and rural respondents, with access to amenities, being close to shops and the variety of entertainment options available rating as the top three attributes of urban New Zealand.

Rural New Zealanders were more likely to value the infrastructure provided by living in an urban environment, while urban New Zealanders were more likely to value greater perceived job opportunities, their social network and local community, and recreational activities.

A lack of job opportunities was also highlighted in the focus groups and may be a key barrier to attracting urban New Zealanders to work in rural New Zealand.

I grew up in New Plymouth and I went to Tauranga for about a year and a half and I chose to move to Auckland, probably for the opportunities – they have far greater opportunities for me than what New Plymouth does and I find it's actually a great town to live in and I can't actually see myself moving back to New Plymouth. I might move down to Tauranga. [So that's a key positive?] Yes, well, I mentioned income because certainly I couldn't achieve that in New Plymouth. (Auckland, opinion leaders, male)

GOOD THINGS ABOUT LIVING IN URBAN NEW ZEALAND

Even though you live in a RURAL area, what do you think are the GOOD things about living in URBAN New Zealand?

	Urban [n=608] %	Rural [n=635] %
CONVENIENCE/ ACCESS TO AMENITIES – GENERAL		
<ul style="list-style-type: none"> • General • Closer to schools/ education • Closer to hospitals/ medical services • Closer to sports facilities/ gym • Closer to libraries 	49.8	53.2
CLOSE TO SHOPS/ SUPERMARKETS	21.3	20.9
VARIETY AND PROXIMITY OF ENTERTAINMENT/ ARTS/ CULTURE/ RESTAURANTS ETC	21.7	17.3
INFRASTRUCTURE		
<ul style="list-style-type: none"> • Better public transport/ easy to get around • Reliable water supply/ reticulated water • Technology – fast internet connection 	8.6	13.7
LIFESTYLE		
<ul style="list-style-type: none"> • More choices – general • More opportunities for young people/ good for children • Good lifestyle 	10.9	10.8
MORE JOB OPPORTUNITIES	16.2	10.1
NEIGHBOURS/ COMMUNITY		
<ul style="list-style-type: none"> • Close to neighbours/ community, more people to interact with • Close to family/ friends 	14.7	9.6
RECREATION		
<ul style="list-style-type: none"> • Like the environment (beaches/ parks etc) 	7.5	1.5
OTHER		
<ul style="list-style-type: none"> • Cheaper/ save on gas • Reduced travelling time • Don't know anything else/ used to it 	10.7	6.8
NONE	4.8	8.1
Base: Respondents who live in a urban or rural area; multiple response		

3.3.2 Bad things about urban New Zealand

Respondents were asked to state, in their own words, what they believed were the bad things about urban New Zealand. The key negatives associated with urban New Zealand were quite different across urban and rural respondents.

For rural New Zealanders, the main negative about living in an urban area was the size of the population, the sense of being crowded and having little privacy.

[What have you got for urban?] Urban. I've just got people gathered in large areas or cities, lots of tall buildings with housing for miles, very little recreational areas, shops in square formation, light shining, noisy and busy. That's what I think when I get out of my little country car in the city. (Hawera, rural, female)

For urban New Zealanders, the main negative was the traffic and lack of public transport.

You go down south and that and they apologise for their traffic jams, but they've got no idea. (Auckland, opinion leaders, male)

The level of perceived crime, pollution and waste were all issues raised to a similar degree by urban and rural respondents. However, urban respondents were more likely to mention the cost of living in an urban area, which might be linked to higher expectations in terms of career and lifestyle, as raised in the focus groups.

[Urban?] For urban I had driving a late model car and I guess my stereotype was more like the middle class. Not necessarily so community focused, more focused on sales and getting ahead, dressed in the latest fashions and they tend to have smaller families than farming families, I think, and have all the latest and greatest things. (Auckland, opinion leaders, female)

Rural respondents were more likely to raise noise and boy racers and negative aspects such as associated stress, antisocial behaviour and not being a good place to raise children.

You think of them being less friendly, but I actually think that's a personality thing, but overall they are less friendly. The fact that their lifestyle is so busy that they don't stop and smell the roses, that kind of sense. And technology, they're just technical people, robots. (Hawera, rural, female)

My wife teaches at the college and she said "you have to keep amusing them all the time or else they're punching one another", and I think the city people are like that. They have to be entertained. (Hawera, rural, male)

BAD THINGS ABOUT LIVING IN URBAN NEW ZEALAND		
<i>Even though you live in a RURAL area, what do you think are the BAD things about living in URBAN New Zealand?</i>		
	Urban [n=608] %	Rural [n=635] %
POPULATION		
<ul style="list-style-type: none"> No privacy/ neighbours too close to each other/ no space Too crowded/ too many people 	24.7	49.5
CRIME/ GANGS	28.2	28.8
BAD TRAFFIC/ TRAFFIC JAMS/ PUBLIC TRANSPORT	31.3	21.6
POLLUTION/ RUBBISH/ SMELLY	13.7	19.6
NOISY/ BOY RACERS	9.4	19.6
PEOPLE NOT FRIENDLY/ NOT A COMMUNITY/ DON'T LOOK OUT FOR EACH OTHER	4.5	9.6
IT'S A RAT-RACE/ STRESSFUL	5.3	6.8
EXPENSIVE	12.9	6.5
ANTI-SOCIAL BEHAVIOUR	1.8	5.0
NOT A GOOD PLACE TO BRING UP CHILDREN/ FAMILIES	1.3	5.0
DON'T LIKE THE LIFE-STYLE/ CITIES IN GENERAL	-	3.6
DRUGS	1.2	1.5
NONE	14.5	2.6
Base: Respondents who live in a urban or rural area; multiple response		

3.4 Views of rural New Zealand

In the quantitative survey respondents were asked to nominate both the good things and bad things about rural New Zealand.

3.4.1 Good things about rural New Zealand

Respondents were asked to state, in their own words, what they believed were the good things about rural New Zealand.

For both urban and rural New Zealanders, the greatest positive of living in rural New Zealand was the perceived lifestyle. The landscape and clean environment were also key positive aspects related to living in rural New Zealand, although urban New Zealanders were likely to raise the landscape as a positive, which may be due to a more superficial perception of rural living.

Rural New Zealanders were more likely to raise having a small population as a positive, while both urban and rural respondents endorsed the closeness of the community, which was also a key aspect raised in the focus groups.

And then for rural, I had community focused, they get more involved in community events and knowing the neighbours because they depend on their neighbours a lot more, I think. (Auckland, opinion leaders, female)

[Rural?] It's a lot of hard work but there are good relationships with the people, the neighbours, and they help each other more and understand. More considerate. Understand people more and help. (Whakatane, rural, female)

GOOD THINGS ABOUT LIVING IN RURAL NEW ZEALAND		
<i>What do you think are the GOOD things about living in RURAL New Zealand?</i>		
	Urban [n=608] %	Rural [n=635] %
LIFESTYLE		
<ul style="list-style-type: none"> • Quiet/ peaceful • Good lifestyle, relaxing • Freedom • Love being or working on a farm/ great outdoors • More things to do (hunting, fishing etc) 	59.7	74.1
OPEN SPACES/ LANDSCAPE		
<ul style="list-style-type: none"> • Open spaces/ beautiful scenery • Birds and animals 	40.5	30.8
CLEAN ENVIRONMENT		
<ul style="list-style-type: none"> • Clean and green/ fresh air • No or little pollution 	27.1	29.0
POPULATION SIZE		
<ul style="list-style-type: none"> • Good size population/ not too many people • No close neighbours • Privacy 	9.3	21.5
NEIGHBOURS/ COMMUNITY		
<ul style="list-style-type: none"> • People know each other/ tight-knit communities • Friendly people • Close to family and friends 	21.5	15.7
GOOD FOR CHILDREN	5.1	9.2
NO CONGESTION/ TRAFFIC	5.2	8.8
SAFE AND SECURE/ LESS CRIME	4.3	6.3
SELF-SUSTAINING LIFESTYLE/ GROW YOUR OWN FRUIT AND VEGETABLES	3.5	5.4
OTHER		
<ul style="list-style-type: none"> • Cheaper/ save on gas • Don't know anything else/ Used to it/ Comfortable 	5.4	3.8
Base: Respondents who live in a urban or rural area; multiple response		

3.4.2 Bad things about rural New Zealand

Respondents were asked to state, in their own words, what they believed were the bad things about rural New Zealand. The negative aspects of living in rural New Zealand showed the greatest differences across urban and rural respondents.

For urban New Zealanders, the main negative about living in a rural area was the distance from facilities, services and people. There were also higher concerns about the isolation of rural areas.

Rural respondents were much more likely to cite the high cost of living in rural areas that was often attributed to petrol costs and council rates in the focus groups.

When we were talking about the community, and I think most of them have brought up about the costs, but it's very sad when you think you've retired and the rates just go up and it's forcing people out of their homes. [So cost of living is rising?] It's just exorbitant now, and I don't think we should have been having to line up with all these things with the dairy farming area, which is very sad because we can produce it so much and we're just not – you know, you go and buy a pound of butter and we've just been over with our son over in Australia and we're paying what they pay and yet we produce all these things and we shouldn't have to. (Whakatane, rural, male)

The lack of infrastructure and access to amenities in rural areas were concerns voiced in the groups.

The community issue would be for the community to adjust to a decreasing population in rural areas, which ties up with the health services – attracting doctors to actually work in the area rather than a big city. (Hawera, rural, male)

[Community issues?] Roading and rates. The poor quality of the roads and how the roading company can never seem to fix them right the first time. (Whakatane, rural, male)

BAD THINGS ABOUT LIVING IN RURAL NEW ZEALAND

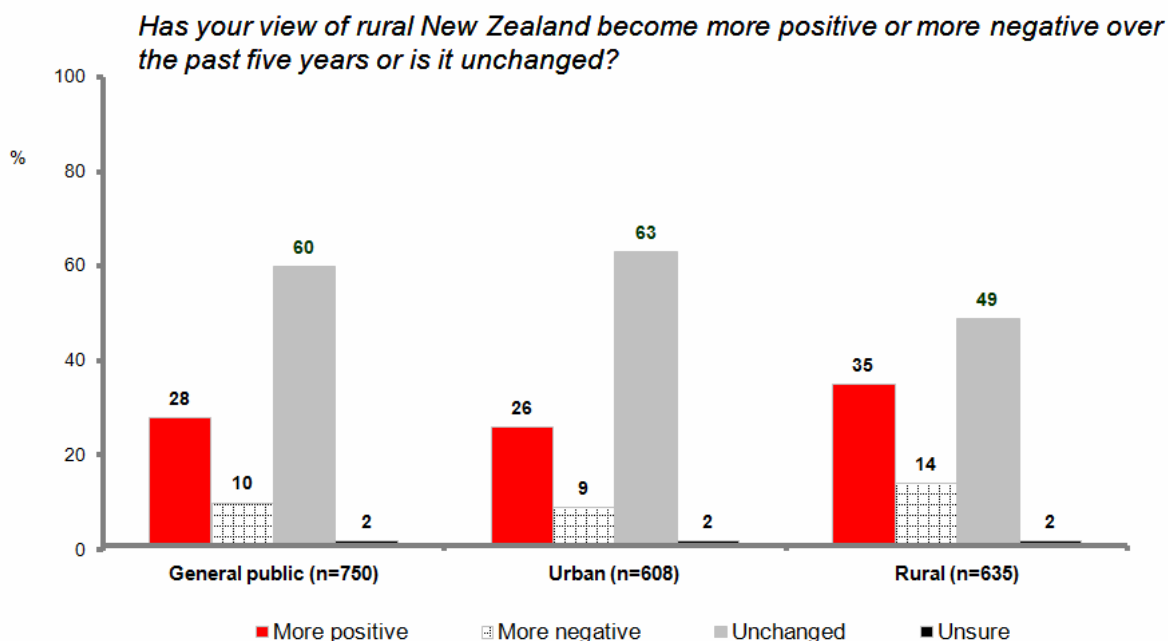
What do you think are the BAD things about living in RURAL New Zealand?

	Urban [n=608] %	Rural [n=635] %
MORE EXPENSIVE/ COST OF LIVING	14.5	30.4
LACK OF INFRASTRUCTURE <ul style="list-style-type: none"> • Lack of public transport/ roading • Lack of infrastructure • Limited/ no broadband/ cellphone coverage 	14.0	25.6
DISTANCE FROM EVERYTHING (SCHOOL/ WORK/ FACILITIES/ FAMILY, FRIENDS)	48.0	25.6
LACK OF AMENITIES AND FACILITIES <ul style="list-style-type: none"> • Access to health facilities/ deficiencies in health service • Lack emergency facilities/ police/ hospitals • Lack of benefits/ services from government/ council 	11.9	11.3
ISOLATION	20.3	9.5
LACK OF CHOICE/ LESS CHOICE – ENTERTAINMENT/ CULTURAL ARTS	9.8	8.1
SMALL POPULATION <ul style="list-style-type: none"> • People not diverse/ small town mentality • Not enough people/ too boring/ too quiet 	6.4	4.0
INCOME/ EMPLOYMENT <ul style="list-style-type: none"> • Fluctuations in economy affect farming / livelihood • Less job opportunities/ low incomes • Long hours in farming/ hard physical labour 	7.8	3.6
OTHER <ul style="list-style-type: none"> • Crime • The weather/ natural disasters • Use of chemicals/ environmentally unfriendly 	5.7	4.8
NONE	7.6	19.4
Base: Respondents who live in a urban or rural area; multiple response		

3.5 Changing views of rural New Zealand

Most respondents felt that their view of rural New Zealand had remained unchanged over the past five years, however, nearly a third declared their view had become more positive. 28% of New Zealanders claimed that their view of rural New Zealand had become more positive over the past five years, 10% more negative and 60% claimed their view remained unchanged.

Changing View of Rural NZ - Summary



Among rural New Zealanders, there were higher levels of those that had either a more positive view or a more negative view of rural New Zealand, no doubt due to their greater levels of knowledge and personal experiences.

Those with less connection with rural New Zealand and older New Zealanders were less likely to rate rural New Zealand more positively.

It was noted that many New Zealanders, even if they lived in cities, had a rural connection and affinity with rural New Zealand.

Maybe it's the people I know. But I still think there are huge amounts of people that have contact with rural people and it's not as if there is a 'them and us'. I think most people have a father or a mother who grew up on a farm, so we aren't completely naïve about how it works in the country. (Canterbury, rural, female)

Access to rural New Zealand was seen to have increased greatly due to improved roads and better motor vehicles, which had resulted in rural New Zealanders becoming less isolated.

I think 50 or 90 years ago farmers were a lot more isolated than they are today, so we have joined in community views. It's brought us a lot closer than ever before. (Christchurch, urban, male)

This greater accessibility was seen to have resulted in some communities becoming less close, as they were not so reliant on each other.

[Do you think views of rural New Zealand have changed?] It depends where you are. I think if you're in the back of Wairoa or Taihape it's still very rural and there's little communities there that still rely on each other. But I think, because things have got more modern and cars and you can get to places like Whakatane, that old-fashioned rural community is going. (Whakatane, rural, male)

There were references made to urban areas expanding into areas that were previously rural. An increase in subdivisions and lifestyle blocks was seen to result in a slow loss of rural New Zealand and a decline in community spirit.

A lot of the farms you think about, specially in our area, have been cut down to subdivisions whether it's 10 acre blocks or smaller. And for the farmers, that's where the money is – in the land. It's no longer in the crops or the sheep they used to have. And so in a lot of ways rural New Zealand is disappearing and also with the water as well, because either you are into dairy farming or you sell the land off. (Canterbury, rural, male)

There was seen to be a decline in the number of urban New Zealanders with any sort of rural connection and, therefore, any perception of rural life or the importance of the rural sector.

I think there are sections of the cities that actually have no concept of rural life. There are children on the west side of this city who have never been to the beach within 3kms walk, so they certainly haven't been out my neck of the woods to see a bull do its thing or to see a lamb being born or whatever. And I think there are sections of the city – the lower socio-economic ends – which aren't having any exposure to country existence. (Canterbury, rural, female)

As found in the quantitative survey, some older participants in the focus groups felt that rural New Zealand was changing for the worse, mainly due to a decline in community spirit.

One of the issues which is facing our community spirit is the fact that in the lifestyle blocks they change hands in under four years – they just rotate. (Canterbury, rural, female)

Rural New Zealanders aged between 30-44 years of age (44%), those that have family with mainly school-aged children (44%) and those that mainly grew up in urban New Zealand (46%) were more likely to have a more positive view of rural New Zealand.

Those that had grown up in rural New Zealand were less likely (27%) to have a positive view of rural New Zealand.

Rural participants in more remote areas felt that community spirit was diminishing with declining populations, school closures, the loss of amenities and the rising number of lifestyle blocks.

[Community issues?] *Closure of schools has meant a decline in the community getting together, having communication with one another. You don't seem to have much to do with your neighbours anymore like you used to years ago when things were happening at the school.* (Hawera, rural, male)

It's not really rural anymore though. There's no little school communities anymore, there's no halls. Like most roads around a community had a hall, there'd be several around each little town. You might find one now and one school, so there are no true rural areas left. (Whakatane, rural, female)

[Rural?] *And the communities, the smaller ones, I mean we were once in an area with four or five little schools. There's one left. It's really sad when that happens because the community, when it's a small community, they help each other in times of trouble, we'll do anything for a neighbour, and that's all going, which is really sad.* (Whakatane, rural, female)

The number of rural properties that are becoming part of lifestyle blocks where they might be 40 or 50 kms out of Auckland or Tauranga and they want space and less stress. But unfortunately, with all the lifestyle blocks, its changing that rural perception we've talked about. [How?] Well, from what I can see, they have their little lifestyle block and they sort of live in their own little world but they still go into the city for their work. [So not part of community?] No, they just want the space and perhaps the air. (Hawera, rural, female)

There were concerns about the changing values of rural children. Some felt that rural children were becoming more like urban New Zealanders and losing traditional rural values such as having a strong work ethic.

The farmers plan everything by the seasons and that maybe years ahead, while the young ones are all 'I want it now'. I'm not too sure whether we are going to have troubles with that in the future. (Canterbury, rural, male)

We get a lot of the kids straight out of school. We find them difficult because the school structure, I'm not sure about it myself because my kids left school a long time ago, but they seem to be – they don't have to work at anything for very long, so when they come into the orchard to work, getting them to work for 2 hours straight is really, really difficult. [So even though they've grown up rurally they still don't like to work hard?] No, they don't have to work. A lot of rural children don't even work on farms anymore or in the orchards. (Whakatane, rural, female)

[So that's the changing face of the rural population a little bit?] *Some of that. This is one of my hobby horses is that my daughter watches a few soap operas on TV and she likes to think that her life can be a bit boring because there isn't a big story every day and every 20 minute episode of her life. And that is her view of everyone else, and here she is stuck in a boring bloody house, on a quarter acre section, sort of thing and nothing exciting is happening.* (Whakatane, rural, male)

3.5.1 Reasons for having a more positive view

Respondents who had a more positive view of rural New Zealand were asked to state, in their own words, their reasons for this change. The main reasons for having a more positive view were that it provided a better lifestyle (25%), specific aspects of farming (19%), improved knowledge of rural New Zealand (11%) and the contrast to urban life (10%).

For rural New Zealanders, a better lifestyle was the clearly the main reason for holding a more positive view (35%). Positive aspects of farming also rated highly (24%) but a closer community rated third (10%), compared with eighth among the general population.

REASONS FOR HAVING A MORE POSITIVE VIEW OF RURAL NEW ZEALAND			
<i>In what way has your view become more positive?</i>			
	General Public [n=207] %	Urban [n=155] %	Rural [n=224] %
BETTER LIFESTYLE <ul style="list-style-type: none"> • Better lifestyle/ less stress, simpler, more peaceful, freer • Quieter, cleaner, closer to nature, less traffic • More to do than in the city • Enjoy physical work/ working outdoors • Food is better • Can live rural, work urban 	24.8	26.6	34.6
FARMING ATTRIBUTES <ul style="list-style-type: none"> • Farming more profitable now/ growth of dairy • Farmers becoming less conservative, more progressive, more environmentally aware • Farming important for New Zealand's economy 	18.6	17.3	24.0
IMPROVED KNOWLEDGE <ul style="list-style-type: none"> • From experience/ talking to rural people • Know more about rural life now/ TV ads 	10.8	11.5	3.6
ESCAPING URBAN LIFE <ul style="list-style-type: none"> • Urban areas becoming more crowded, more traffic/ too busy/ expensive • More privacy/ Get away from people/ Get away from the rat race 	10.3	13.3	4.0
BETTER FOR RAISING CHILDREN	7.6	5.2	7.5
CHANGING PRIORITIES/ INTERESTS	7.0	4.9	6.3
IMPROVING SERVICES/ BECOMING MORE SOPHISTICATED	6.9	6.6	3.9
CLOSER COMMUNITY, FRIENDLY PEOPLE	6.7	4.9	10.0
WOULD LIKE TO MOVE/ ABOUT TO MOVE	4.0	4.3	0.7
CHEAPER HOUSING	3.8	3.4	3.1
<i>Continued over page...</i>			

**REASONS FOR HAVING A MORE POSITIVE VIEW OF RURAL NEW ZEALAND
(continued)**

In what way has your view become more positive?

	General Public [n=207] %	Urban [n=155] %	Rural [n=224] %
SAFER/ LESS CRIME	3.8	3.2	3.2
MORE PEOPLE MOVING THERE/ MORE LIFESTYLE BLOCKS	2.6	3.5	0.8
MORE JOB OPPORTUNITIES	1.4	0.7	7.9
NO LONGER AS ISOLATED	1.3	1.7	0.8
BECOME MORE SELF RELIANT	1.1	0.9	0.9
MORE CULTURAL DIVERSITY IN RURAL AREAS	0.7	0.9	-
LIKE ATTITUDE/ VALUES OF RURAL PEOPLE	0.4	0.6	1.3

Base: Respondents whose view of rural New Zealand has become more positive over the past five years

In the focus groups there was some mention of the advertising campaign promoting the dairy industry impacting positively on rural perceptions.

[View of rural New Zealand changing?] *I think the Fonterra ads they're having on TV, about trying to get people into the dairy industry as a career, I think it's made them much more aware than say 15-20 years ago. [More positive?] I think it is. I think its becoming more attractive to people. (Hawera, rural, male)*

3.5.2 Reasons for having a more negative view

Respondents who had a more negative view of rural New Zealand were asked to state, in their own words, their reasons for this change in view. The main reason was negative perceptions of farming.

Other reasons for holding a more negative view of rural New Zealand were the perceived rising cost of living (stronger among rural respondents) and lack of access to amenities (stronger among urban respondents).

Among urban respondents, an improvement in urban life was also cited as a reason for viewing rural life more negatively, while rural respondents were more likely to mention a rise in crime in rural areas.

REASONS FOR HAVING A MORE NEGATIVE VIEW OF RURAL NEW ZEALAND

In what way has your view become more negative?

	General Public [n=77] %	Urban [n=55] %	Rural [n=91] %
FARMING ATTRIBUTES			
<ul style="list-style-type: none"> • Pollution caused by dairying/ increased dairying • Farming becoming bigger/ more intensive/more profit driven • Some farming (sheep, beef) facing economic problems/not as profitable • Accidents/ health on farms • Increased bureaucracy in farming/ government not helping • Dislike increase of dairy farms • Contribution of farming to economy not appreciated 	35.9	42.2	44.5
RISING COST OF LIVING			
<ul style="list-style-type: none"> • Costs increasing/ rising petrol prices • Cost of land increasing 	20.2	13.2	22.5
ACCESS TO AMENITIES/ SERVICES			
<ul style="list-style-type: none"> • Services/ schools closing/ reduced rural population • Distance to services/ shops etc • Lack of elderly care 	15.9	15.1	9.5
CITY LIFE HAS IMPROVED/ PREFER CITY LIFE	9.9	13.8	1.5
MORE CRIME/ LACK OF POLICE PRESENCE	7.9	7.3	11.2
EMPLOYMENT			
Poor wages in rural sector/ widening gap between rich and poor Lack of job opportunities/ security	6.7	-	8.4
DYSFUNCTIONAL FAMILIES/ UNDISCIPLINED CHILDREN	4.3	3.4	2.2
INCREASE IN LIFESTYLE BLOCKS	3.9	5.4	7.1
DISLIKE ATTITUDE OF RURAL PEOPLE/ RURAL LIFE	3.0	2.8	2.8
CLIMATIC CHANGES	2.4	3.4	3.8
NEGATIVE MEDIA REPORTS	2.2	3.1	-
LESS GAME ANIMALS TO HUNT	1.1	1.4	-
RURAL SKILLS BEING LOST	-	-	1.5

Base: Respondents whose view of rural New Zealand has become more negative over the past five years

In the focus groups a number of concerns regarding farming were mentioned.

Concerns were raised over the corporatisation of dairy farming, as it was seen to be changing the nature of farming and the types of people working in the industry. The focus on productivity was seen to be impacting on the closeness of some rural communities.

Farming nowadays is all about units. No-one talks about stock anymore – it's all about units. It's about money and overall it's a very negative picture. You only hear from them when it's bad news. (Canterbury, rural, male)

The corporate farming model was also seen to be negating many of the lifestyle benefits of living rurally.

Some of the big farms are more like factories for the people that work in it. If you're just a milker and that's all you do. [And I think too, for the farms that are getting bigger, it makes it harder for those who are wanting to start out. It's just not available. (Interjection)] (Hawera, rural, male)

I mean farming's becoming more corporatised though. As land prices make it more expensive and no longer do the kids inherit the farm but they either buy it or it goes on the open market. And it's more about farming for profitability than the lifestyle. Probably growing up – [Is that a bad thing or not?] It's positive for the economy but from the view of rural, it's no longer perhaps the easy lifestyle it would have been, because given the cost you pay for a farm you've actually got to work that thing and make it efficient, so it means hard work and long hours. (Auckland, opinion leaders, male)

The amalgamation and conversion of land into dairy farms was seen to be impacting on the environment.

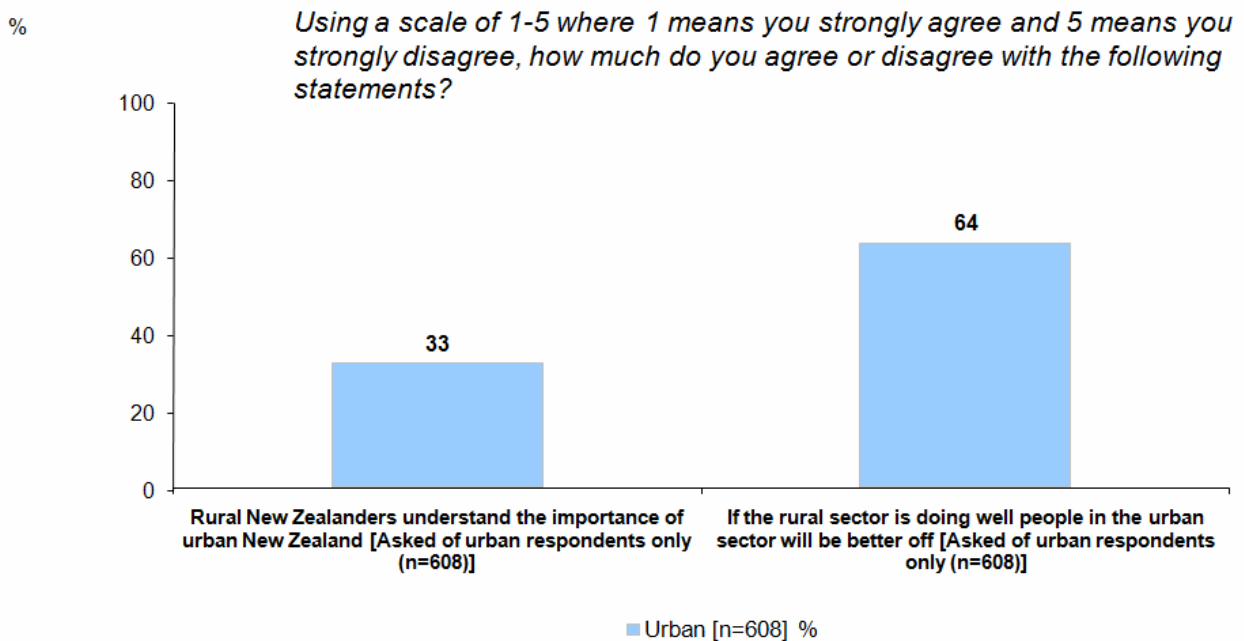
[Rural?] Well, I see the farming communities being split up so much with little bits of farm being sold and I don't know what's going to happen, but I've seen land that really wasn't dairy farming being made into it, as we were talking rivers, and they would get all the water pumped up from the river but then there's all the effluent that they have to get rid of and it just goes on and on and on. There doesn't seem to be any stopping it. So it's a very big thing and I think now they're starting to do that all down in the South Island. (Whakatane, rural, female)

3.6 Value of urban and rural New Zealand

3.6.1 Importance of rural New Zealand – urban respondents

Respondents were asked about the relative importance of urban and rural New Zealand. A majority of urban New Zealanders were convinced of the importance of rural New Zealand, with 64% agreeing that 'if the rural sector is doing well people in the urban sector will be better off'. There were no groups recording significantly lower agreement. However, New Zealanders living in smaller urban centres, those who grew up in rural New Zealand and older respondents were more likely to agree.

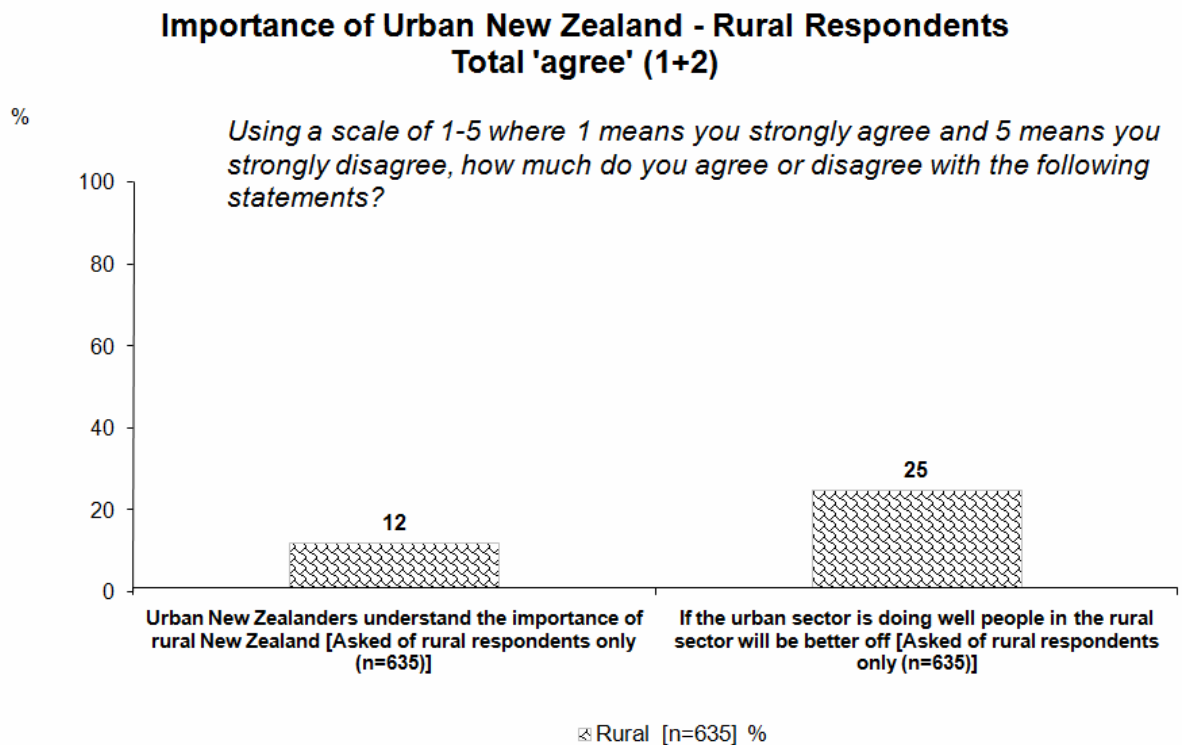
Importance of Rural New Zealand - Urban Respondents Total 'agree' (1+2)



There was uncertainty over whether 'rural New Zealanders understand the importance of urban New Zealand', with 33% of urban respondents agreeing with this statement, 23% disagreeing and 44% either expressing a neutral or unsure response. Older respondents were more likely to believe rural New Zealanders understood the value of urban areas. Those on high incomes and in professional occupations were less likely.

3.6.2 Importance of urban New Zealand – rural respondents

In contrast to urban New Zealanders, only 25% of rural New Zealanders were convinced of the importance of urban New Zealand, agreeing that 'if the urban sector is doing well people in the rural sector will be better off'. Those on lower incomes and older respondents were more likely to agree with this statement.



Only 12% of rural respondents agreed that rural New Zealanders understand the importance of urban New Zealand. This was consistent with the focus groups, where few economic attributes were assigned to urban New Zealand by rural participants, while both urban and rural focus group participants acknowledged the economic importance of the rural sector.

[Do you think urban New Zealanders think rural New Zealand is important?] I don't think they really realise what's going on. My family have no idea what goes on where I live. (Whakatane, rural, female)

However, many in the urban groups did acknowledge the importance of rural New Zealand.

The economy is still built around farming. I mean, without the dairy industry the whole economy would collapse, I think. [Agricultural exports. (Interjection)] In terms of, if we think of things that we produce... that we produce and export rather than just relying on tourism, there's not much we actually manufacture. (Auckland, opinion leaders, female)

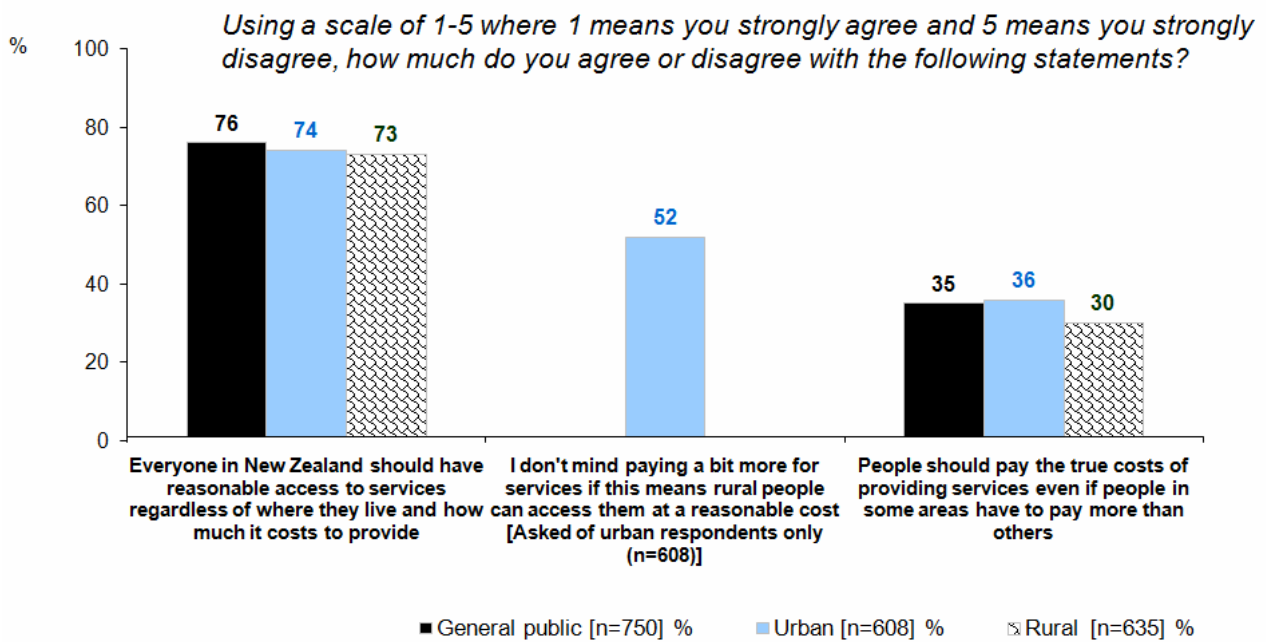
3.7 Services to rural New Zealand

There was strong support for providing services to rural areas regardless of the cost across urban and rural New Zealanders. There was strong agreement that ‘everyone in New Zealand should have reasonable access to services regardless of where they live and how much it costs to provide’, at 74% and 73% respectively.

Around half of urban respondents agreed that they did not mind paying a bit more for services if this means rural people can access them at a reasonable cost, 16% disagreed and around a third were uncertain about this issue (nominating a neutral or unsure response).

Comparing urban and rural New Zealanders, agreement that ‘people should pay the true costs of providing services even if people in some areas have to pay more than others’ was slightly lower among rural respondents at 36% and 30% respectively. Provincial South Islanders were also less likely to agree with this statement.

Services to Rural New Zealand - Summary
Total 'agree' (1+2)



IV. Connections to Rural New Zealand

4.1 Chapter overview

- A majority of respondents in paid occupations work in urban New Zealand. Even among rural residents, over a third either work in urban New Zealand or their work involves working in both the urban and rural environment.
- 76% of urban respondents and 85% of rural respondents were born in New Zealand.
- There appeared to be a reasonable flow of urbanites moving to live rurally and vice versa. Just under a third of urban respondents grew up in rural New Zealand.

A similar number of rural respondents had grown up in urban New Zealand.

- 42% of urban New Zealanders claimed to often visit family or friends that live in a rural area.
- 40% of urban New Zealanders claimed to have family or close friends that work in the farming sector, 21% in the horticulture sector and 14% in the forestry sector.

As expected, personal connection to these three sectors was higher among rural New Zealanders.

- 22% of urban New Zealanders claimed to have worked in the farming sector, 18% in the horticulture sector and 8% in the forestry sector.

Understandably, rural New Zealanders recorded higher declared proportions that work in these sectors.

■ Key demographic differences

- A higher proportion of those born overseas reside in Auckland, are on higher incomes and are from non-New Zealand European backgrounds.
- Age was not a determinant on whether New Zealanders had grown up in rural New Zealand. Aucklanders were less likely to claim to have grown up in rural New Zealand.

■ Key demographic differences (continued)

- Older respondents were no more likely to visit family or friends in rural New Zealand than younger people. However, those living in Auckland, Wellington, those who were not born in New Zealand and those on very high incomes (over \$100,000 per annum) were less likely to visit.
- Older urban dwellers were less likely to have family or friends who work in farming or forestry, as were Aucklanders and those born overseas.
- Younger urbanites were more likely to claim they worked in the forestry sector.

4.2 Place of work

73% of respondents were in paid employment (55% full-time and 18% part-time), with claimed employment status similar across both urban and rural respondents.

Of those in full or part-time work, 74% claimed to work in urban New Zealand and 17% in rural New Zealand, while 9% claimed to work in both areas.

Just over a third (39%) of rural New Zealanders either work in urban New Zealand or their work involves working in both urban and rural New Zealand.

PLACE OF WORK			
[Those working full-time or part-time]			
<i>Where do you (mainly) work?</i>			
	General public [n=546] %	Urban [n=442] %	Rural [n=481] %
Urban New Zealand	74	83	26
Rural New Zealand	17	8	61
Both	9	9	13
Other	-	-	-

Base: Respondents who work full-time or part-time

4.3 Place of birth and childhood

4.3.1 Place of birth

77% of respondents claimed to have been born in New Zealand (76% of urban respondents and 85% of rural respondents). Aucklanders and those earning over \$100,000 per annum were more likely to have been born overseas.

BORN IN NEW ZEALAND			
<i>Were you born in New Zealand?</i>			
	General public [n=750] %	Urban [n=608] %	Rural [n=635] %
Yes	77	76	85
No	23	24	15
Base: All respondents			

Later in this report there are some differences in opinion on some issues by those born overseas. To shed some light on these differences, a demographic breakdown of those born overseas is outlined below. Across those born overseas, a higher proportion resides in Auckland, are on higher incomes and are not from a New Zealand European background.

BORN IN NEW ZEALAND – DEMOGRAPHIC BREAKDOWN

Were you born in New Zealand?

	General public [n=750] %	Born overseas [n=174] %
REGION		
Auckland	32	51
Provincial	47	31
Christchurch	11	6
Wellington	10	12
GENDER		
Male	48	56
Female	52	44
AGE		
18-29	21	27
30-44	30	29
45-59	26	24
60 +	23	20
HOUSEHOLD INCOME		
\$20,000 or less	8	7
\$20-30,000	10	7
\$30-40,000	11	6
\$40-50,000	11	10
\$50-70,000	17	13
\$70-100,000	16	17
More than \$100,000	18	27
Refused/ nil	9	13
ETHNICITY (multiple response)		
Maori	11	-
NZ European	78	36
Other European	12	42
Pacific Island	3	5
Asian	5	20
Other	3	9

4.3.2 Place of childhood

There appeared to be a reasonable flow of urbanites moving to live rurally and vice versa.

Of urban respondents born in New Zealand, 65% claimed to have mainly grown up in urban New Zealand, 25% rural New Zealand and 9% in both. This indicates that around 30% of urban respondents have moved from rural New Zealand to live in urban New Zealand. There were no differences recorded by age, however, Aucklanders were less likely to claim to have grown up in rural New Zealand.

A similar number of rural respondents appear to have moved from urban New Zealand to live rurally. Of rural respondents born in New Zealand, 28% claimed to have grown up in urban New Zealand, 64% in rural New Zealand and 8% in both. Rural respondents that live closer to an urban centre were more likely to have grown up in urban New Zealand than those who live in a remote area.

GREW UP IN URBAN/ RURAL NEW ZEALAND OR OVERSEAS			
[Those who were born in New Zealand]			
<i>Where did you (mainly) grow up?</i>			
	General public [n=576] %	Urban [n=462] %	Rural [n=538] %
Urban New Zealand	59	65	28
Rural New Zealand	32	25	64
Both	9	9	8
Overseas	-	-	-
Unsure	-	1	-

Base: Respondents who were born in New Zealand

4.4 Links with rural New Zealand

4.4.1 Visiting rural New Zealand

42% of urban New Zealanders claim to often visit family or friends who live in a rural area. Older respondents were no more likely to visit family or friends in rural New Zealand than younger people.

However, those living in Auckland, Wellington, who were not born in New Zealand and on very high incomes (over \$100,000 per annum) were less likely to visit.

VISIT FAMILY/ CLOSE FRIENDS THAT LIVE IN RURAL NEW ZEALAND	
[Those who live in an urban area]	
<i>Do you often visit family or close friends that live in rural New Zealand?</i>	
	Urban [n=608] %
Yes	42
No	58
Base: Respondents who live in an urban area	

4.4.2 Work in rural sectors

➤ Family or friends who work in sectors

40% of urban New Zealanders claimed to have family or close friends who work in the farming sector, 21% in the horticulture sector and 14% in the forestry sector. Older urban dwellers were less likely to have family who work in farming or forestry.

Aucklanders and those born overseas were also less likely to know people who work in any of the sectors.

As expected, personal connection to these three sectors was higher among rural New Zealanders, with 75% declaring they have family or close friends who work in farming, 33% horticulture and 23% forestry. Those living in a rural area close to a main urban centre were less likely to work in farming. Rural females were less likely to work in forestry.

FAMILY/ CLOSE FRIENDS WORKING IN SECTORS			
<i>Do you have family or close friends who work in the following industries?</i>			
	General public [n=750] %	Urban [n=608] %	Rural [n=635] %
	Yes	Yes	Yes
Farming	45	40	75
Horticulture	23	21	33
Forestry	15	14	23
Base: All respondents; multiple response			

➤ Personally work in sectors

22% of urban New Zealanders claimed to have worked in the farming sector, either currently or in the past, 18% in the horticulture sector and 8% in the forestry sector. There were no differences recorded by age across the farming or horticulture sector, however, younger urbanites were more likely to claim they had worked in the forestry sector.

Aucklanders, Wellingtonians and those born overseas were less likely to have worked in farming or horticulture. Aucklanders, Wellingtonians and females were less likely to have worked in forestry.

Understandably, rural New Zealanders recorded higher connections, with 69% claiming to have worked in the farming sector, 34% in horticulture and 19% in forestry.

PERSONALLY CURRENTLY WORK (OR EVER WORKED) IN SECTORS			
<i>Do you currently or have you ever worked in the following industries?</i>			
	General public [n=750] %	Urban [n=608] %	Rural [n=635] %
	Yes	Yes	Yes
Farming	29	22	69
Horticulture	20	18	34
Forestry	10	8	19

Base: All respondents; multiple response

4.5 Links with urban New Zealand

It appears that rural residents are more likely to visit an urban area regularly, with 66% of rural New Zealanders claiming to often visit family or friends in urban New Zealand. There were no significant demographic differences recorded for this question.

VISIT FAMILY/ CLOSE FRIENDS THAT LIVE IN <u>URBAN</u> NEW ZEALAND	
<i>[Those who live in a rural area]</i>	
<i>Do you often visit family or close friends that live in urban New Zealand?</i>	
	Rural [n=635] %
Yes	66
No	34

Base: Respondents who live in a rural area

V. Living and Working in Rural and Urban New Zealand

5.1 Chapter overview

- More urban dwellers were likely to contemplate moving to rural New Zealand than rural dwellers were likely to consider moving to an urban area.
- Around a quarter of New Zealanders who live and work in urban areas claimed they would seriously consider moving to live rurally. Those with some sort of connection to rural New Zealand were more likely to consider a rural life.
- A similar proportion of urbanites would consider working in rural New Zealand. Of those interested in working rurally, farming was the most appealing sector to work in.
- It would be easier to convince those living rurally but working in an urban centre to switch to a rural job, with much higher levels of interest shown across this audience.
- There was very low interest shown by rural residents in moving to live (8%) or work (10%) in an urban area. In the focus groups, the greatest appeal of an urban life was potentially better job opportunities.

5.2 Changing to live or work in rural New Zealand

5.2.1 Moving to live in rural New Zealand – live/ work urban

24% of New Zealanders who live and work in urban areas claimed they would seriously consider moving to live rurally (combined 1 + 2 on a 1 to 5 scale where 1 means very seriously and 5 means not seriously at all). 57% claimed they would not seriously consider this option (combined 4 + 5), while 20% gave a neutral response (3).

CONSIDER MOVING TO LIVE IN RURAL NEW ZEALAND – LIVE/ WORK URBAN	
[Those who live and work in an urban area]	
<i>Using a 1 to 5 scale where 1 means very seriously and 5 means not seriously at all - how seriously would you consider moving to live in rural New Zealand?</i>	
	Urban [n=367] %
1 - Very seriously	12
2	12
TOTAL 1 + 2	24
3	20
4	21
5 - Not seriously at all	36
TOTAL 4 + 5	57
Unsure	-
Base: Respondents who live and work in an urban area	

A rural lifestyle appeared to be more appealing to Māori respondents, those who had grown up in both an urban and rural area, and those who had previously worked in farming or horticulture, all of whom are groups who tend to have a closer connection and better knowledge of rural New Zealand.

In the focus groups, many with some rural connection were positive about the rural lifestyle.

[What about you?] *We had a dairy farm out the Manukau Peninsula, 258 acres, but that was when I was very young. The boys enjoyed it because you could go for walks ... and get rid of vermin like rabbits and rats or whatever, as you tend to do, or walk along the coast, west coast, go fishing, really enjoyable. [So your view's pretty positive?] Yes, urban life's very different from rural, completely. [What is different about it?] A lot more natural and a lot less stress. (Auckland, general public, male)*

However, there were a number of reservations voiced about living in a rural environment, in particular, leaving a familiar environment, lack of services and things to do.

[Live rurally?] *We'd like to but I'd be bored and I know it. [Is it a lot different?] Yes. It's a lifestyle choice. A lot of the things, or the reasons why people would want to go there, they're probably the same reasons that they'd leave after a couple of years. And for retirement no, because as I get older I'm going to need medical services.* (Auckland, opinion leaders, male)

[Would you ever consider living in rural New Zealand?] *No. I'm just a city kid. My parents have bought a small piece of property in Waihi and we go down and visit and you just see the kids riding their bikes up and down the main street at 9 o'clock at night. I'm like, why would you want to be there? They've got nothing to do.* (Auckland, general public, female)

Some with teenage children also felt it would be difficult to uproot their children at that age and there were concerns about having enough activities to occupy teenage children.

It would be very hard for teenagers in a small town. [So you don't think it's necessarily a good lifestyle?] If they've got something to do then it's great and, for up to 13, it's wonderful because they always find something to do, but after that they're itching for the big smoke or they're itching for something to do which leads to idle hands and problems. (Auckland, general public, female)

5.2.2 Working in rural New Zealand – live/ work urban

Consideration of working in rural New Zealand was similar to consideration of living in rural New Zealand. Among those who live and work in urban New Zealand, 24% declared they would seriously consider working in rural New Zealand while 52% would not. 24% gave a neutral response.

CONSIDER WORKING IN RURAL NEW ZEALAND – LIVE/ WORK URBAN	
[Those who live and work in an urban area]	
<i>Using a 1 to 5 scale where 1 means very seriously and 5 means not seriously at all - how seriously would you consider working in rural New Zealand?</i>	
	Urban [n=367] %
1 - Very seriously	11
2	13
TOTAL 1 + 2	24
3	24
4	14
5 - Not seriously at all	38
TOTAL 4 + 5	52
Unsure	-
Base: Respondents who live and work in an urban area	

Urban Wellingtonians and those who had mainly grown up in urban New Zealand were less likely to consider working in rural New Zealand.

There were a number in the urban focus groups who clearly felt it would be a daunting prospect to restart a career in rural New Zealand.

We've done an awful lot of investigation into it but it's a big thing, chucking in the jobs that pay and the financial security of that and taking this massive leap into – especially when you don't really know what you're doing and then to contemplate being a complete dog's body, it's quite hard. (Auckland, general public, female)

Some also had negative perceptions about the types of work available in rural New Zealand.

I've just always been fearful of that commitment of having to be here (on the farm). [So that's a negative for you in terms of working on a farm?] Well yes. I mean planning a holiday or if someone's sick. That's scary. (Auckland, general public, female)

Those with a rural connection (had mainly grown up in a rural area (42%), had grown up in both an urban and rural area (55%) and had worked in the horticulture industry (39%) were more likely to consider working in rural New Zealand. In the focus groups, urban respondents with a rural connection tended to be more positive towards rural New Zealand and a few were seriously exploring their options in moving there.

Well, because we've got friends who are dairy farmers, they keep going "come and do it, come and do it, come and do it, we'll teach you everything you want, come be a sharemilker and... you can just come and do it". And I just investigated a camping ground actually in Blenheim to see what that one was like, but again it's this huge risk. (Auckland, general public, female)

Of those who would seriously consider working in rural New Zealand, 40% were interested in working in the farming sector and 34% in horticulture. Only 5% were interested in working in forestry.

In the focus groups, farming was clearly viewed as the sector offering the best employment opportunities.

[Is dairy the only option or would you look at other things?] It's probably the better one that pays at the moment. Financially it is better. (Auckland, general public, male)

SECTOR(S) YOU WOULD LIKE TO WORK IN – LIVE/ WORK URBAN

Which, if any, of the following sectors would you like to work in:

	Urban [n=87] %
Farming	39.7
Horticulture	33.5
Forestry	5.1
VOLUNTEERED	
Health/healthcare	4.4
Investing/professional services/accounting services to rural area	3.6
Teaching/performing arts	3.0
Community work/helping people	2.8
IT industry	2.4
Wildlife preservation	1.3
Building industry	1.1
Craft business	1.1
None	7.2

Base: Respondents who live and work in an urban area and would seriously consider working in rural New Zealand (n=87); multiple response

5.2.3 Working in rural New Zealand – live rural/ work urban

Higher consideration of working in rural New Zealand was recorded among New Zealanders who live in a rural area but work in an urban area. 50% would seriously consider working in a rural area, while 23% would not. 24% gave a neutral response, while 3% were unsure.

Sub-samples were too small to record demographic differences.

CONSIDER WORKING IN RURAL NEW ZEALAND – LIVE RURAL/ WORK URBAN	
[Those who live in a rural area and work in an urban area]	
<i>Using a 1 to 5 scale where 1 means very seriously and 5 means not seriously at all - how seriously would you consider working in rural New Zealand?</i>	
	Rural [n=124] %
1 - Very seriously	33
2	17
TOTAL 1 + 2	50
3	24
4	11
5 - Not seriously at all	12
TOTAL 4 + 5	23
Unsure	3
Base: Respondents who live in a rural area and work in an urban area	

Of those respondents interested in working in a rural area, the farming sector was the most appealing, with 60% nominating this as a sector they would like to work in. 42% nominated horticulture, while 14% nominated forestry.

SECTOR(S) YOU WOULD LIKE TO WORK IN - LIVE RURAL/ WORK URBAN	
<i>Which, if any, of the following sectors would you like to work in:</i>	
	Rural [n=62] %
Farming	59.8
Horticulture	42.0
Forestry	14.0
VOLUNTEERED	
Health/healthcare	1.5
Teaching/performing arts	1.5
Pathology/lab blood testing	1.0
Tourism	0.6
Conservation	0.6
Iwi work	0.6
None	4.1
Base: Respondents who <u>live in rural area</u> and <u>work in an urban area</u> and would seriously consider working in rural New Zealand (n=62); multiple response	

5.3 Changing to live or work in urban New Zealand

5.3.1 Moving to live in urban New Zealand – live/ work rural

Among rural New Zealanders interest in living in an urban area was very low. Only 8% would seriously consider living in urban New Zealand. 79% would not consider this option, while 13% gave a neutral response.

Sub-samples were too small to record demographic differences.

CONSIDER MOVING TO LIVE IN URBAN NEW ZEALAND – LIVE/ WORK RURAL [Those who live in and work in a rural area] <i>Using a 1 to 5 scale where 1 means very seriously and 5 means not seriously at all - how seriously would you consider moving to live in urban New Zealand?</i>	
	Rural [n=293] %
1 - Very seriously	4
2	4
TOTAL 1 + 2	8
3	13
4	17
5 - Not seriously at all	62
TOTAL 4 + 5	79
Unsure	-
Base: Respondents who live in and work in a rural area	

In the rural focus groups there was very little interest shown in moving to live in urban New Zealand. Most preferred a rural lifestyle and would only consider the move due to a change of personal circumstance or for job opportunities.

It would depend on the reason why. I mean, if it was work or for health reasons or something then... [You might consider it?] Yes. But not by choice. There would have to be a situation that would make me have to move to New Plymouth would probably be the biggest city – it's still rural. (Hawera, rural, female)

And I've been tossing that ball in the air really, whether to go back to the city or not to earn the money, but then it means giving up my horses and my dog and my lifestyle. Just what for? A few more dollars and then I'd have to share a place with somebody. So it's like having my freedom. (Whakatane, female)

5.3.2 Working in urban New Zealand – live/ work rural

Working in urban New Zealand was also not an appealing option for rural residents. 10% declared they would seriously consider working in urban New Zealand; 73% would not. 17% gave a neutral response.

Sub-samples were too small to record demographic differences.

CONSIDER MOVING TO WORK IN URBAN NEW ZEALAND – LIVE/ WORK RURAL	
[Those who live in and work in a rural area]	
<i>Using a 1 to 5 scale where 1 means very seriously and 5 means not seriously at all - how seriously would you consider moving to work in urban New Zealand?</i>	
	Rural [n=293] %
1 - Very seriously	5
2	5
TOTAL 1 + 2	10
3	17
4	20
5 - Not seriously at all	53
TOTAL 4 + 5	73
Unsure	-
Base: Respondents who live in and work in a rural area	

VI. View of Sectors

6.1 Chapter overview

- Consistent with the focus groups, the farming sector was seen as the most significant sector for generating money for New Zealand (87%), followed by tourism (79%), forestry (61%), horticulture (60%), energy (49%), manufacturing (47%), fishing (47%) and the film industry (33%).
- Views of all four sectors tested – farming, tourism, horticulture and forestry – were generally positive or neutral. However, respondents were most positive towards farming and tourism.
- While both urban and rural respondents nominated poor environmental management as a key negative regarding the farming sector, rural respondents were less likely to view farming as profit driven and were more likely to raise the high cost of doing business as a negative.
- Poor environmental management was also the key concern regarding the forestry sector for both urban and rural respondents. However, rural respondents were also more likely to view the sector as underperforming.
- While urban and rural respondents cited the horticulture sector's perceived underperformance as the key negative, rural respondents were more likely to also cite poor environmental management and poor employers as reasons for holding a negative view.
- In the focus groups there were many common themes raised when asked to nominate the ideal values to be exhibited by the three sectors. These included: good environmental management, being sustainable, being transparent and open, being good employers, provision of quality, innovative and good value products, and being a successful and well managed industry.
- New Zealand was clearly seen to excel in the farming sector but respondents were less convinced about performance in the forestry and horticulture sectors.
- Most New Zealanders felt there was some room for expansion of the farming, horticulture and forestry sectors.

■ Key demographic differences

- Rural respondents were less likely to rate the contribution of tourism, forestry, fishing and the film industry as significant.
- Rural New Zealanders viewed the farming sector more positively than urban New Zealanders and were less likely to view the tourism and forestry sector positively when compared with urban New Zealanders.
- While urban and rural New Zealanders held similar views on the positives associated with the farming, forestry and horticulture sectors, there were some differences across the negatives raised.
- Respondents not born in New Zealand were less likely to view New Zealand as a world leader in farming and forestry.
- Rural New Zealanders were more likely to agree that 'New Zealand is a world leader in farming' and less likely to agree that 'New Zealand is a world leader in forestry'.
- There appeared to be a general trend by age, with younger respondents less likely to view expansion of any of the sectors positively, while older respondents were more likely.

6.2 Significance of sectors

Respondents were asked to rate a range of sectors according to their perceived significance in generating money for New Zealand.

The farming sector rated highest, with 87% claiming it was significant (combined 1 + 2 where 1 meant very significant and 5 meant not significant at all). This was followed by tourism (79%), forestry (61%), horticulture (60%), energy (49%), manufacturing (47%), fishing (47%) and the film industry (33%).

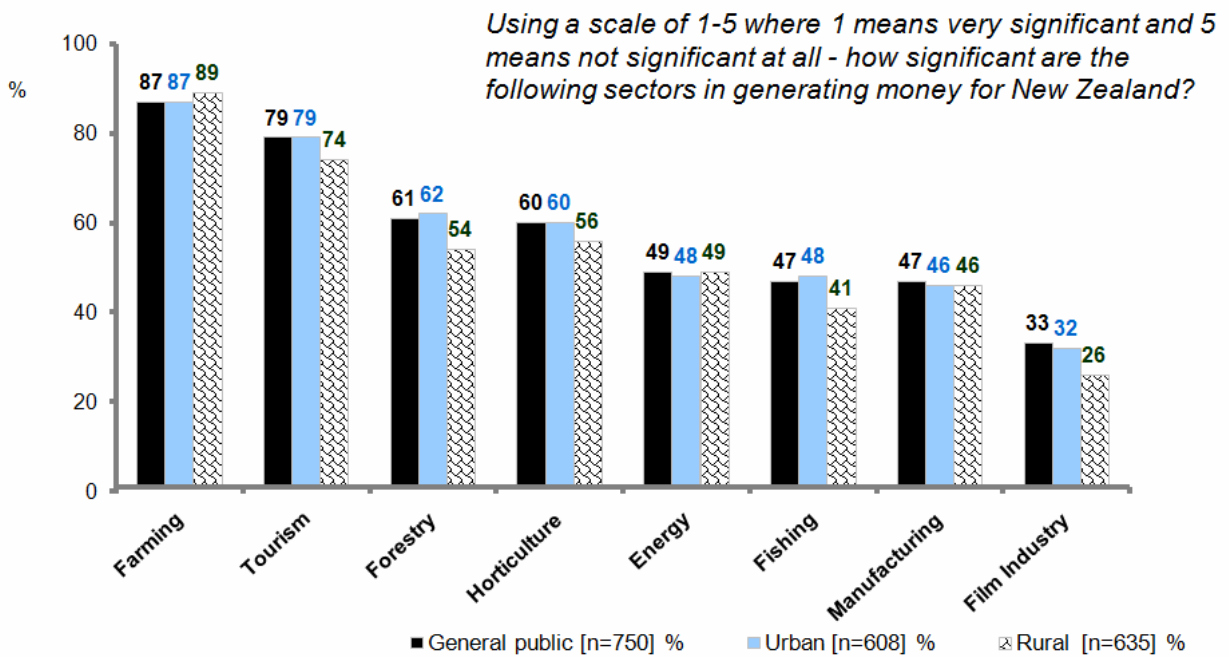
These views were backed up in the focus groups where, clearly, respondents viewed agriculture as a key sector for New Zealand.

[How important is the agriculture sector for New Zealand?] *Crucial*. [Why is it important?] *The export factors – butter. It's important for the economic stability of the country.* (Auckland, general public, female)

It's about the money they bring in and agriculture does bring in the most money. (Whakatane, male)

While urban responses were in line with all New Zealanders, there were some significant differences recorded among rural New Zealanders, with lower 'total' significance (combined 1 + 2) scores recorded for tourism, forestry, fishing and the film industry.

Significant Sectors - Summary Total 'significant' (1+2)



6.3 View of sectors

Views of all four sectors tested – farming, tourism, horticulture and forestry – were generally positive or neutral.

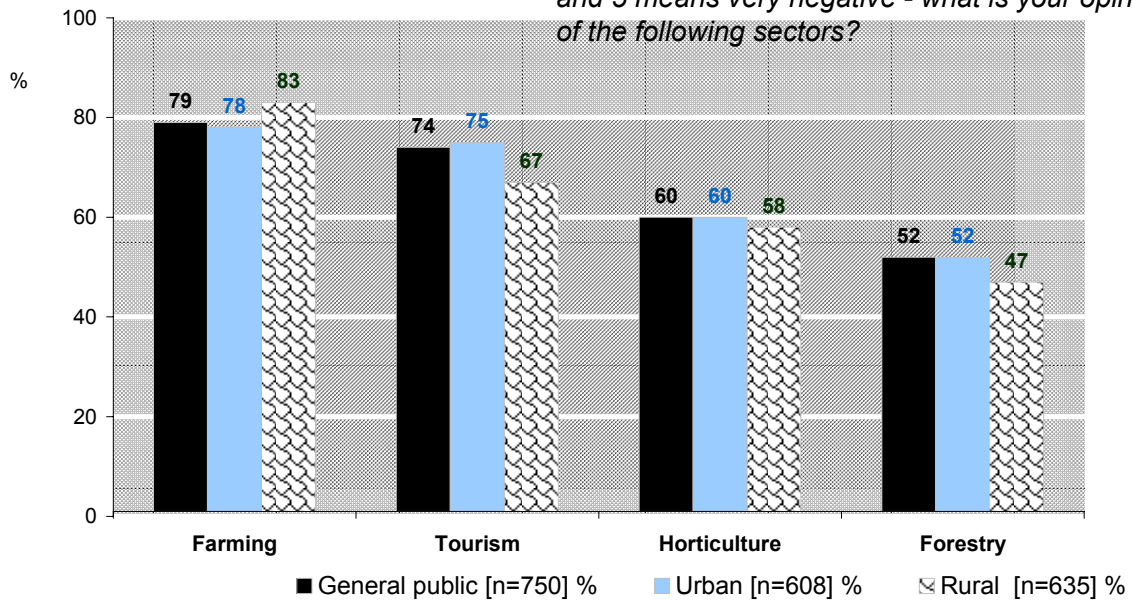
However, farming (79%) and tourism (74%) were viewed most positively on a 'total' positive basis (combined 1 + 2 where 1 meant very positive and 5 meant very negative), followed by horticulture (60%) and forestry (52%).

Rural New Zealanders viewed the farming sector more positively than urban New Zealanders and were less likely to view the tourism and forestry sector positively when compared with urban New Zealanders.

View of Sectors - Summary

Total 'positive' (1+2)

Using a scale of 1-5 where 1 means very positive and 5 means very negative - what is your opinion of the following sectors?



6.4 Reasons for view of sectors

6.4.1 Reasons for positive view of farming sector

Respondents who had a positive view of the farming sector were asked to state, in their own words, the reasons for this view. Of those with a positive view of the farming sector, the main reasons for this positive rating were that the sector was good for the economy (48%) and that it was the backbone of New Zealand (36%). At lower levels were positive values associated with the sector (18%) and that it is an essential sector for New Zealand (18%).

Recorded reasons for a positive view were very similar across both urban and rural respondents.

REASONS FOR HAVING A POSITIVE VIEW OF THE FARMING SECTOR			
<i>Why do you have a positive view of the farming sector, what are your reasons?</i>			
	General Public [n=303] %	Urban [n=237] %	Rural [n=309] %
GOOD FOR ECONOMY			
<ul style="list-style-type: none"> • Good for economy • Supports other industries • Exports • Good lifestyle/ good life 	48.2	50.0	54.9
BACKBONE OF NEW ZEALAND	36.4	37.7	30.4
ASSOCIATED VALUES			
<ul style="list-style-type: none"> • Family orientated • Hardworking • Honesty/ integrity • Self reliant/ self employed • Positive way of life/ healthy 	18.4	16.8	22.7
PRODUCES ESSENTIAL PRODUCTS			
<ul style="list-style-type: none"> • Produces food for New Zealand • Got to have farming 	17.5	15.1	17.4
INNOVATIVE, QUALITY PRODUCTS			
<ul style="list-style-type: none"> • Good quality products • Innovative/ diversified 	10.8	11.2	13.5
GOOD OPPORTUNITIES	7.1	5.9	9.9
GOOD ANIMAL WELFARE	2.6	2.4	1.0
ENVIRONMENTAL ISSUES			
<ul style="list-style-type: none"> • Climate reasons • No air pollution • Natural resources/ natural environment made available • Healthy environment to work in/ good for environment • Stops redevelopment/ keep land for farming 	1.5	1.9	0.9
<i>Continued over page...</i>			

**REASONS FOR HAVING A POSITIVE VIEW OF THE FARMING SECTOR
(continued)**

Why do you have a positive view of the farming sector, what are your reasons?

	General Public [n=303] %	Urban [n=237] %	Rural [n=309] %
KNOWLEDGE OF SECTOR			
<ul style="list-style-type: none"> • Familiar with industry • Close friends in industry • Experiences of farmers • What I do/ work in industry/ I am a farmer 	1.3	1.2	4.5
SUCCESSFUL/ WELL MANAGED			
<ul style="list-style-type: none"> • Unsubsidised and efficient • Dairy payouts/ dairy industry • Milk prices are good/ good market rate 	0.2	0.3	2.0
Base: Respondents who have a 'Very positive' view of the farming sector; multiple response			

6.4.2 Reasons for negative view of farming sector

Respondents who had a negative view of the farming sector were asked to state, in their own words, the reasons for this view. The overriding reason respondents held a negative view of farming was because of perceived poor environmental management (65%). This was followed by perceptions that the sector is profit driven (31%), the impact of methane gases on climate change (13%), and the cost of doing business (10%).

Across the negatives there were significant differences recorded between urban and rural respondents. While both urban and rural respondents nominated poor environmental management as a key negative, rural respondents were less likely to view farming as profit driven but were more likely to raise the high cost of doing business.

REASONS FOR HAVING A NEGATIVE VIEW OF THE FARMING SECTOR

Why do you have a negative view of the farming sector, what are your reasons?

	General Public [n=48] %	Urban [n=42] %	Rural [n=26] %
ENVIRONMENTAL MANAGEMENT <ul style="list-style-type: none"> • Bad environmental record – general • Run off into waterways/ rivers • Drain on natural resources (land) • Using sprays/ fertilisers • Drain on natural resources (water) • Using hormones/ antibiotics 	64.5	52.3	88.4
PROFIT DRIVEN <ul style="list-style-type: none"> • Self-interested/ profit seeking/ just want to make money • Too much publicity (cost) on milk and butter • Industrialisation 	31.2	30.9	26.9
METHANE GASES, IMPACT ON CLIMATE CHANGE	12.5	9.5	11.5
COST OF BUSINESS <ul style="list-style-type: none"> • Cost of farming expensive 	10.4	9.5	26.9
ANIMAL WELFARE <ul style="list-style-type: none"> • Vegetarian/ do not like killing animals • Poor treatment of animals 	2.1	2.4	3.8
DAIRY FARMERS TREATED BETTER BY GOVERNMENT	-	-	7.7
DAIRY FARMING DOING WELL BUT CATTLE FARMERS LOSING MONEY	-	-	3.8
Base: Respondents who rated the farming sector '4' or '5 Very negative'; multiple response			

6.4.3 Reasons for positive view of forestry sector

Respondents who had a positive view of the forestry sector were asked to state, in their own words, the reasons for this view. The main reasons New Zealanders had a positive view of the forestry sector were that the sector was good for the economy (46%), the types of products the sector produces (22%), the industry had a positive environmental impact (20%), and the industry created job opportunities (19%).

The economic benefits provided by the sector rated as the biggest reason for both urban and rural respondents to have a positive view, however, rural respondents were more likely to cite the types of products produced by the sector as a positive, while urban respondents were more likely to raise the positive environmental benefits of the industry.

REASONS FOR HAVING A POSITIVE VIEW OF THE FORESTRY SECTOR

Why do you have a positive view of the forestry sector, what are your reasons?

	General Public [n=132] %	Urban [n=104] %	Rural [n=97] %
GOOD FOR ECONOMY <ul style="list-style-type: none"> • Good for economy • Timber exports • More processing done in New Zealand • Important for us 	45.9	48.3	39.2
PRODUCTS <ul style="list-style-type: none"> • Helps build New Zealand • Planting trees for paper • Do not rely on artificial products 	21.7	18.8	31.8
ENVIRONMENTAL ISSUES <ul style="list-style-type: none"> • Erosion control/ prevents land slips • Known for its green area/ land • Positive effect on environment • Oxygen in air/ cleans the air/ purifies the air • Need trees/ trees are necessary whether you cut them or not • Good use of land/ grow pine trees from California 	19.9	21.9	7.5
EMPLOYMENT OPPORTUNITIES	18.8	14.5	18.5
GOOD INVESTMENT <ul style="list-style-type: none"> • Long term advantages/ investment 	11.7	10.2	16.0
POSITIVE FOR CLIMATE CHANGE <ul style="list-style-type: none"> • Carbon credits • Helps with global warming/ pleasant environment/ cleans air/ good climate • Help with Kyoto Protocol 	8.4	7.9	9.9
SUSTAINABLE SECTOR <ul style="list-style-type: none"> • Renewable resource/ natural resource/ renewable energy • Ecologically friendly/ don't devastate the country • Environment sustainability 	6.5	8.3	6.5
KNOWLEDGE OF SECTOR <ul style="list-style-type: none"> • Worked in the forestry sector/ family work there • Enjoy doing forestry 	4.8	4.0	4.8
ASSOCIATED VALUES <ul style="list-style-type: none"> • Hardworking 	4.3	4.2	4.3
SUCCESSFUL <ul style="list-style-type: none"> • Going well instead of going down • World demand 	0.9	1.1	2.4
BACKBONE OF NEW ZEALAND	-	-	0.8
Base: Respondents who have a 'Very positive' view of the forestry sector; multiple response			

6.4.4 Reasons for negative view of forestry sector

Respondents who had a negative view of the forestry sector were asked to state, in their own words, the reasons for this view. The main reason for holding a negative view of the forestry sector was its poor environmental management (52%), followed by perceptions that the industry was not performing well (16%) and perceived foreign ownership (15%).

Again, poor environmental management was the issue of most concern to urban and rural respondents, however, rural respondents were more likely to view the sector as underperforming.

REASONS FOR HAVING A NEGATIVE VIEW OF THE FORESTRY SECTOR			
<i>Why do you have a negative view of the forestry sector, what are your reasons?</i>			
	General Public [n=83] %	Urban [n=62] %	Rural [n=84] %
ENVIRONMENTAL MANAGEMENT			
<ul style="list-style-type: none"> • Deforestation • Not environmentally friendly • Lack of replanting • Sucks nutrients from land 	51.7	51.6	48.8
NOT SUCCESSFUL			
<ul style="list-style-type: none"> • No demand for timber/ not saleable • Prices • Land could be used for something else that makes money quicker • Market conditions/ NZ dollar/ profits way down 	15.6	11.3	27.3
FOREIGN OWNERSHIP	14.5	12.9	13.1
KYOTO PROTOCOL ISSUES	7.2	4.8	8.3
LAND BEING CONVERTED TO DAIRY	6	6.5	7.1
PRODUCTS			
<ul style="list-style-type: none"> • Not putting timber into products 	3.6	4.8	-
POOR EMPLOYERS			
<ul style="list-style-type: none"> • Poor health and safety/ drug use by workers 	1.2	1.6	1.2
POOR MANAGEMENT			
<ul style="list-style-type: none"> • Land owners not trustworthy • Management side inefficient 	2.4	1.6	2.4
Base: Respondents who rated the forestry sector '4' or '5 Very negative'; multiple response			

Additional analysis was undertaken among rural respondents with a negative view of forestry. This analysis found there were no significant differences between those that lived in rural areas with high, medium and low urban influence and highly rural/remote areas.

6.4.5 Reasons for positive view of horticulture sector

Respondents who had a positive view of the horticulture sector were asked to state, in their own words, the reasons for this view. The main reasons for having a positive view of the horticulture sector were that it was good for the economy (46%) and the products produced by the sector (38%). Views were very similar across both urban and rural respondents.

REASONS FOR HAVING A POSITIVE VIEW OF THE HORTICULTURE SECTOR			
<i>Why do you have a positive view of the horticulture sector, what are your reasons?</i>			
	General Public [n=160] %	Urban [n=129] %	Rural [n=129] %
GOOD FOR ECONOMY <ul style="list-style-type: none"> • Good for economy/ exporting produce • Big income producer/ good money earner • Tourism reasons 	46.3	50.6	47.7
PRODUCTS <ul style="list-style-type: none"> • Growing specialist produce • Increase in organic farming • Scientific innovation • Part of diet/ quality of products • Have to eat food/ essential in feeding population, New Zealand and world 	38.4	37.8	40.2
ASSOCIATED VALUES <ul style="list-style-type: none"> • Hardworking • Like growing things • Self reliant 	8.8	9.4	11.9
ENVIRONMENTAL ISSUES <ul style="list-style-type: none"> • Good use of land • Green image/ cleans air • Climatic advantages • Good for environment 	5.9	6.6	3.0
KNOWLEDGE OF SECTOR <ul style="list-style-type: none"> • Family doing it/ worked there/ friends work in industry • Social networks 	4.4	2.6	2.6
SUSTAINABLE SECTOR <ul style="list-style-type: none"> • Sustainable • Renewable source 	4.2	3.9	2.4
EMPLOYMENT OPPORTUNITIES	2.5	2.0	3.4
BINDS RURAL COMMUNITIES TOGETHER	0.3	0.4	-
SUCCESSFUL LINK WITH AGRICULTURE <ul style="list-style-type: none"> • Without horticulture won't have farming • Part of agriculture/ market is rising • Just a type of farmer 	-	-	3.4
MAORI OWNERS TAKEN LAND BACK	-	-	0.8
Base: Respondents who have a 'Very positive' view of the horticulture sector; multiple response			

6.4.6 Reasons for negative view of horticulture sector

Respondents who had a negative view of the horticulture sector were asked to state, in their own words, the reasons for this view. The main reasons for holding a negative view of the horticulture sector were perceptions that the sector was not performing well (28%) and poor environmental management (24%).

Both urban and rural respondents viewed the sector as underperforming, however, rural respondents were more likely to cite poor environmental management and being poor employers as reasons for holding a negative view of the sector.

REASONS FOR HAVING A NEGATIVE VIEW OF THE HORTICULTURE SECTOR			
<i>Why do you have a negative view of the horticulture sector, what are your reasons?</i>			
	General Public [n=46] %	Urban [n=37] %	Rural [n=35] %
NOT SUCCESSFUL <ul style="list-style-type: none"> Industry facing tough times Many exiting/ lack of new people joining Not enough progress seen 	28.2	24.3	37.2
ENVIRONMENTAL MANAGEMENT <ul style="list-style-type: none"> Bad for environment - use of pesticides/ hormones Bad environmental record – general Bad for environment - heavy water use Genetic modification Industry should focus on organic farming 	23.9	18.9	40.1
POOR EMPLOYERS <ul style="list-style-type: none"> Low wages Staff issues 	6.5	2.7	11.4
COST OF BUSINESS <ul style="list-style-type: none"> Petrol/ gas prices 	6.5	5.4	2.9
SUSTAINABILITY ISSUES <ul style="list-style-type: none"> Limited resources Need to plant species that are suitable to New Zealand conditions 	4.4	5.4	5.7
DIFFICULT INDUSTRY <ul style="list-style-type: none"> Competitive/ cut-throat Vulnerable to weather 	4.4	-	5.8
NOT AS IMPORTANT AS DAIRY INDUSTRY TO ECONOMY	4.3	5.4	5.7
PRODUCTS <ul style="list-style-type: none"> Cheaper in other countries Importing raw produce from China - not good 	2.2	2.7	8.6
BIOSECURITY ISSUES	-	-	2.9
Base: Respondents who rated the horticulture sector '4' or '5 Very negative'; multiple response			

6.5 Ideal values for sectors

In the focus groups there was discussion on the ideal values that should be exhibited by the three sectors. These were consistent with the perceived positives and negatives associated with the sectors in the quantitative survey.

➤ Environmental management

All wanted to see good environmental management implemented by the sectors, with many specific examples cited for each sector, such as better use of water, less use of sprays (pesticides, fertiliser, hormones), better management of run-off, no use of genetic modification and more use of organic approaches.

I think it's like agriculture. It's the walk the talk if we are clean and green. I mean clean and green is probably one of our whole niche marketing strategies. (Auckland, opinion leaders, male)

[How would you like to see the horticulture sector operate?] *Cleaner, less pollution, more organics. (Auckland, opinion leaders, female)*

We're partly moving there. There are some quite innovative things coming through like the nitrification inhibitor things, which will supposedly stop all the nitrogen going into the waterways and things. But there's an awful lot of catch up needed. Apparently, they mix milk from one part of the North Island with milk from another, as the nitrate level in the milk is too contaminated. (Christchurch, urban, female)

The use of more natural sprays and fertilisers and more information as to where you get them from. (Whakatane, rural, female)

[Horticulture?] *They take a lot out without thinking about putting it back. [Do you mean water?] Yes. I kind of think they need to be looking at putting in dams and recycling water and things. They're using so much of it. (Whakatane, rural, female)*

[If you're going to look at the ideal set of values that these sort of industries?] *I had pesticides earlier so I would say care for the environment, which also incorporates genetic modification and genetic engineering as well as pollution from those pesticides and hormone metabolic interference that some of those things do. (Auckland, general public, female)*

[Ideal values] *Environmentally friendly. [Could the agriculture sector do more?] A lot of us do but some are dragging the chain and we possibly could do more. [What areas?] Water. [What could be done?] Fertiliser run-off. (Hawera, rural, male)*

➤ Sustainability

Across both the urban and rural focus groups there were respondents who felt the sectors needed to operate sustainably - for the agriculture and horticulture sectors this translated to ensuring the land was not farmed too intensively.

Forestry was often viewed as being a sustainable industry, although there were some concerns about deforestation.

[Anything else?] *Well, I think they have a good crack at sustainable planting. They have a managed process with felling it and then regeneration of the land and replanting and so forth. [But only on land designated for replanting. (Interjection)]* (Auckland, opinion leaders, male)

[Do you think they do treat the land well?] *I think in some places they probably over stock. [But you're not too sure, you don't really know?] No. I'm sure some farmers try to overdo it, perhaps because they're seeing their bottom line rather than their creatures.* (Auckland, general public, female)

In the Waikato, some of them, over the last two years have trebled their herds and you wonder whether the land will sustain that amount of herds. And with the drought you wonder if they had 50 odd head of stock less on the farm they might have found it a bit easier. (Hawera, rural, female)

➤ Transparency

There were calls for transparency and openness in how the sectors operate so that it was clear that they were meeting all their obligations.

Probably transparency. What they say they practice, that they actually are. (Hawera, rural, female)

[Anything else?] *It'd be good just to know that they treat the land well and the stock, whatever it may be – sheep, cows.* (Auckland, general public, female)

[So you want to know what's going on? Do you know how they operate?] *We don't know what goes on behind it, the public aren't quite aware of quite how their vegetables are grown. There are a lot of things about production we don't hear about.* (Auckland, general public, female)

➤ Good employers

Participants wanted the sectors to be good employers. This mainly related to paying reasonable wages and providing adequate training.

Part of that would be upskilling the forestry labour force who traditionally have been... (Auckland, opinion leaders, male)

Well they could always pay people a liveable wage, you know. It's like a tax cut, everyone wants tax cuts. Just earn a decent wage. (Auckland, opinion leaders, male)

And they often have unskilled labour. That's unskilled, that's not being trained properly. (Whakatane, rural, male)

➤ **Product and service delivery**

For a country the size of New Zealand to be successful, the sectors were seen to need to focus on producing innovative, high quality, added value products and targeting niche, high value markets.

[Anything else?] *Not adding value. There are too many logs exported. I think we're at a stage now, I reckon New Zealand should be able to start stopping some of these primary exports. I mean why export logs.* (Auckland, opinion leaders, male)

[Ideal values – what would you like to see them do as an industry, as a sector?] *Concentrate on niche markets, because with the global economy and world, if you compete with someone selling stuff for a buck a tonne, that's what you're competing with.* (Auckland, opinion leaders, male)

Some also wanted quality goods to be sold in New Zealand rather than exported and to be provided at a good price.

[What ideal values would you like to see this industry show?] *It would be nice to get some higher quality produce that stays in New Zealand rather than everything being exported.* (Auckland, general public, female)

➤ **Successful and well managed industry**

Some praised the Fonterra model and felt that this was a good model to apply to other sectors, so that an industry was well organised and achieved optimum returns.

[Horticulture?] *There seems to be a lot of in-fighting among the growers and marketers, there just doesn't seem to be a happy relationship. Perhaps they need to take a look at how the dairy industry operates.* (Hawera, rural, female)

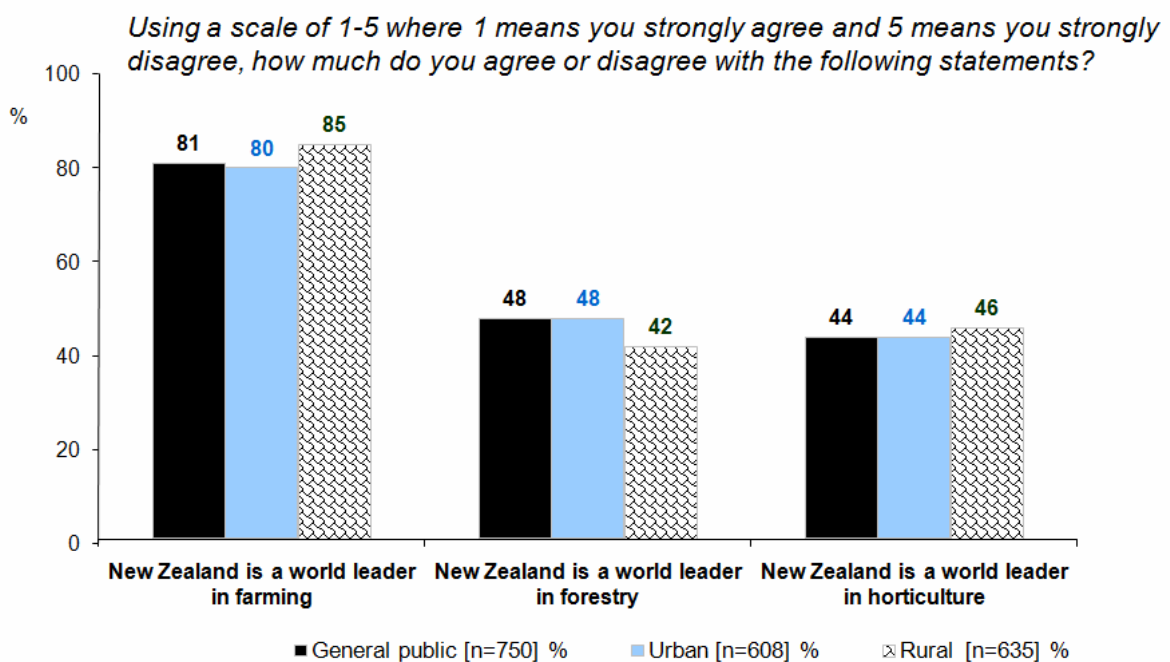
6.6 World leaders in sectors

New Zealand was clearly seen to excel in the farming sector. 81% of respondents agreed that 'New Zealand is a world leader in farming', compared with 48% for forestry and 44% for horticulture.

Respondents not born in New Zealand were less likely to view New Zealand as a world leader in farming and forestry.

Rural New Zealanders were more likely to agree that 'New Zealand is a world leader in farming' and less likely to agree that 'New Zealand is a world leader in forestry'. Rural respondents who work in both urban and rural New Zealand were less likely to view New Zealand a world leader in farming and forestry. Those living in South Island remote urban areas were also less likely to view New Zealand as a leader in forestry.

World Leader in Sectors - Summary Total 'agree' (1+2)



6.7 Sustainability of sectors

Most New Zealanders felt there was some room for expansion of the farming, horticulture and forestry sectors. 78% agreed that 'expansion of the horticulture sector in the future is good for New Zealand', 75% for the farming sector and 69% for the forestry sector.

There appeared to be a general trend by age, with younger respondents less likely to view expansion of any of the sectors positively while older respondents were more likely.

A majority of participants in the focus groups also felt that there was room to grow these sectors sustainably as there was still underutilised land and by increasing productivity and improving technology.

[Do you think the sectors we talked about have the ability to grow and still be sustainable?] *Yes. There's still a lot of underutilised land in New Zealand. (Auckland, opinion leaders, male)*

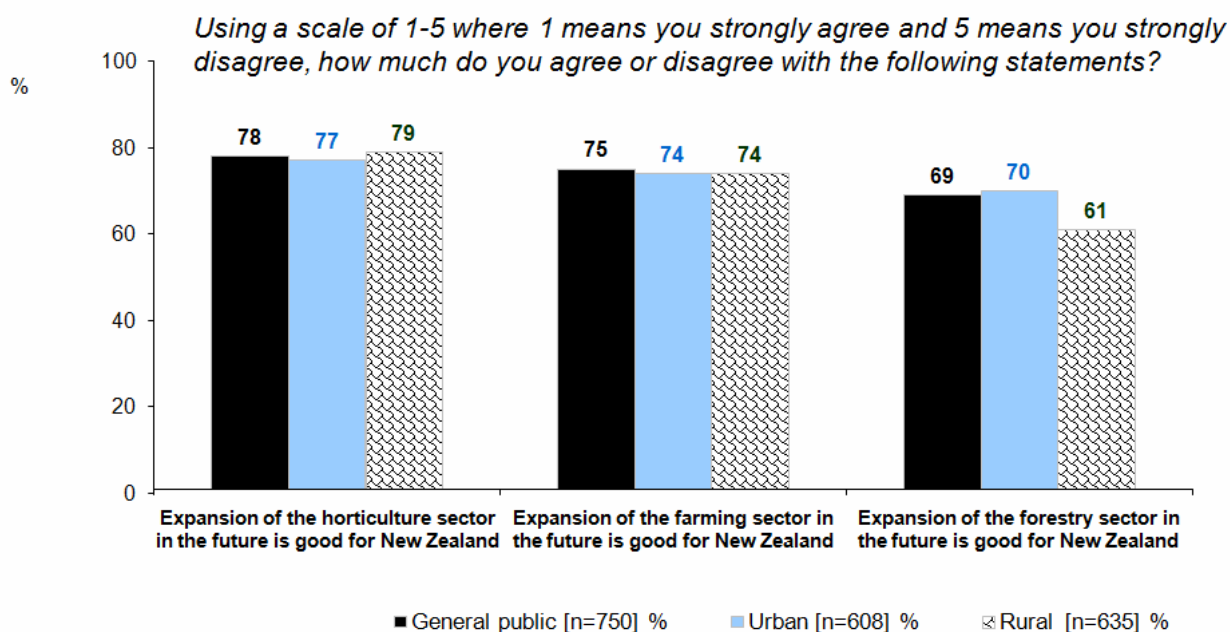
[Do you think these sectors can grow sustainably in New Zealand?] *I mean, one of the issues that keeps being talked about is our need to increase productivity and probably it comes through better research and development and finding ways to do things more efficiently.* (Auckland, opinion leaders, male)

[Can we grow much more?] *I doubt if we'd be able to double it. We'd probably be able to add half again.* [And any impact on doing this?] *Dairying is good for the land. It's not bad for the actual productivity in the land. You can't really wear out land by dairying unless you really poison it sort of thing.* (Hawera, rural, male)

Results were similar across urban and rural New Zealanders, apart from lower agreement (61%) recorded among rural New Zealanders that 'expansion of the forestry sector is good for New Zealand'. In the focus groups rural New Zealanders held reservations about the impact of exotic forests on the land and preferred to see forests grown on marginal, poor quality land.

It's not good wood. It takes all the goodness out of the land. When the trees are dropped the land is useless for anything else until you put a lot of fertilisers and a lot of effort into bringing the land back to balance again. (Whakatane, rural, female)

Expansion of Sectors - Summary Total 'agree' (1+2)



VII. Environmental Issues

7.1 Chapter overview

- Key environmental concerns were pollution, climate change, the need to implement sustainable practices and the disposal of waste.
- 48% of respondents wanted more regulations to protect the environment, 36% believed the current amount was about right and 12% wanted less regulations.
- Views on the enforcement of regulations were similar, with 47% of the respondents believing that regulations were not enforced strongly enough, 36% believing regulations were enforced appropriately and 11% believing regulations were enforced too strongly.
- Respondents were not totally convinced that New Zealanders recognise the importance of water with only half believing that we do. Endorsing this view was another question that found that a significant proportion (41%) felt that New Zealand has plenty of water to meet its needs.
- 58% of respondents supported people paying for water, however, rural respondents were less likely to support this stance.
- There are clearly concerns regarding the use of water by the agriculture and horticulture sector, with only just over a third of respondents believing that agriculture and horticulture make good use of water.
- A number questioned the cause of climate change, with nearly half of respondents believing natural weather cycles are more important in determining climate change than anything people do.
- There was reasonable support for New Zealand taking an international lead on climate change.
- There was also a majority who felt that, even though New Zealand is a small country, there are things we can do about climate change.
- Internationally, the biggest causes of climate change were seen to be industry and vehicles. While industry and vehicle use were seen as key causes of domestic climate change, farm animals also rated quite strongly as a reason for domestic climate change.

■ Key demographic differences

- Rural respondents were less likely to nominate climate change and the need to employ sustainable practices as key environmental concerns and more likely to nominate water use.
- Wellingtonians and younger respondents were more likely to support having more regulations to protect the environment. Rural New Zealanders, provincial South Islanders and older respondents were less likely.
- Wellingtonians and female respondents were more likely to feel that regulations were not enforced strongly enough and rural New Zealanders, provincial South Islanders and males were less likely.
- Older respondents were less concerned about water and believed the agriculture and horticulture sector made good use of water.
- Aucklanders and respondents not born in New Zealand were more likely to believe everyone should pay for water.
- Rural New Zealanders were more likely to agree that natural weather cycles are the main cause of climate change.

There was also a trend by age, with younger respondents less likely to believe natural weather cycles determine climate change than older respondents.

- Rural New Zealanders, males and older respondents were less keen for New Zealand to take an international lead in the reduction of global warming. Males and older respondents were also more likely to believe that there was little New Zealand could do about climate change.
- Rural New Zealanders were slightly less likely to nominate vehicles and farm animals as a cause of domestic climate change.

7.2 Important environmental issues

Respondents were asked to mention, in their own words, what they believed the most important environmental issues facing New Zealand are. On a first mention basis, pollution (32%) was seen as the most important environmental issue, followed by climate change (22%), becoming more sustainable (10%) and waste disposal (9%).

Concerns were much the same across both urban and rural respondents.

MOST IMPORTANT ENVIRONMENTAL ISSUES FACING NEW ZEALAND TODAY – FIRST MENTION			
<i>What are the most important environmental issues facing New Zealand today?</i>			
	General Public [n=750] %	Urban [n=608] %	Rural [n=635] %
Pollution	31.6	30.0	33.9
Climate change	22.3	24.0	17.1
Becoming more sustainable, employing sustainable practices	10.0	11.4	9.1
Waste	9.3	7.9	9.0
Water use	3.5	3.6	5.8
Urban planning/ development	3.1	3.5	3.0
Green image	1.8	2.0	1.9
Depletion of resources	1.3	1.5	0.8
Government policies	1.3	1.3	1.4
Biosecurity	0.9	0.8	1.1
Genetic engineering	0.8	0.7	1.6
Ozone depletion	0.3	0.3	0.8
1080 poison	0.1	0.2	-
Rest of world not helping the environment	0.1	0.2	-
Overpopulation/ human impact	0.1	0.2	0.5
Flora, fauna and marine conservation	-	-	0.4
Internal social conflict/ social issues	-	-	0.2
Unsure	10.6	9.7	11.3
None	2.9	3.0	2.5
Base: All respondents			

On a combined mention basis, 70% nominated pollution, 29% climate change, 21% the need to implement sustainable practices, and 18% waste disposal.

Rural respondents were less likely to nominate climate change and the need to employ sustainable practices when compared to urban respondents, and were more likely to nominate water use.

MOST IMPORTANT ENVIRONMENTAL ISSUES FACING NEW ZEALAND TODAY – COMBINED MENTIONS			
<i>What are the most important environmental issues facing New Zealand today?</i>			
<i>Any others?</i>			
	General Public [n=750] %	Urban [n=608] %	Rural [n=635] %
Pollution	69.7	67.6	72.8
Climate change	28.8	30.3	24.7
Becoming more sustainable, employing sustainable practices	20.7	23.0	15.9
Waste	17.5	15.9	16.0
Water use	7.7	7.4	10.9
Urban planning/ development	6.3	6.8	5.4
Depletion of resources	4.4	5.0	2.2
Green image	3.9	4.3	3.7
Genetic engineering	2.7	2.5	2.7
Biosecurity	2.0	1.8	2.1
Government policies	1.8	1.5	2.8
Flora, fauna and marine conservation	1.1	1.3	0.4
Overpopulation/ human impact	0.9	0.7	2.4
Ozone depletion	0.8	1.0	1.1
Natural hazards – flooding/ sea erosion/ land erosion	0.3	0.3	0.5
1080 poison	0.1	0.2	-
Rest of the world not helping the environment	0.1	0.2	-
Base: All respondents; multiple response			

7.3 Regulations to protect the environment

7.3.1 Right balance between regulations and promoting economic growth

Respondents were asked, taking into consideration 'whether New Zealand has the right balance between protecting the environment and promoting economic growth', if there should be more regulations to protect the environment, fewer or whether the current balance was about right.

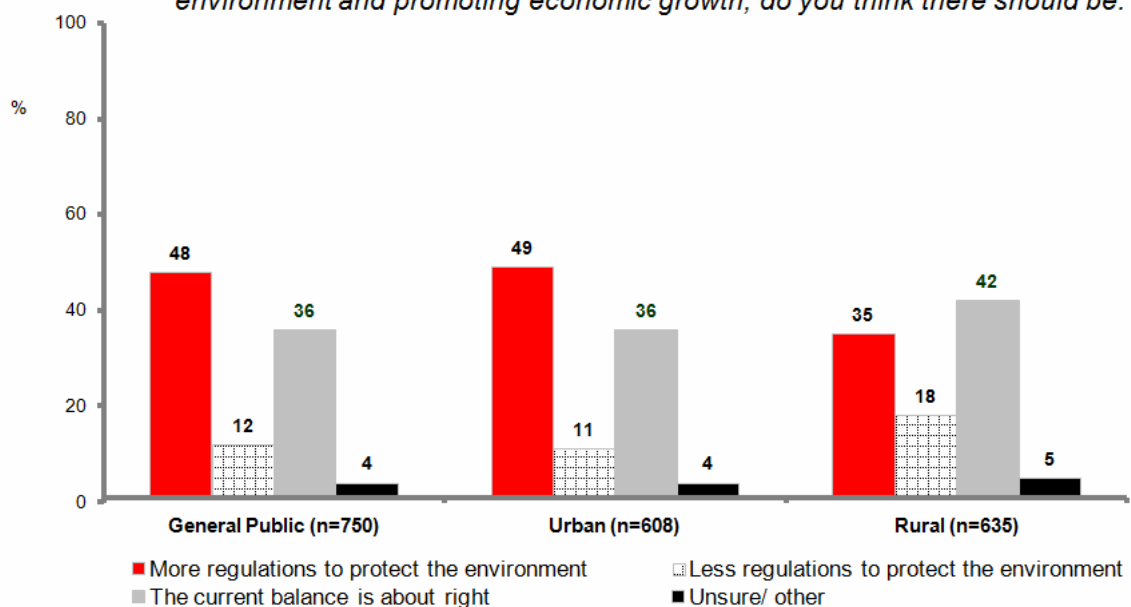
48% felt that there needed to be more regulations, 12% fewer and 36% claimed that the current balance was about right. While Wellingtonians and younger respondents were more likely to support having more regulations to protect the environment, provincial South Islanders and older respondents were less likely.

Rural New Zealanders recorded significantly different scores with only 35% endorsing more regulations, 18% fewer regulations and 42% claimed that the current balance was about right. Higher support for more regulations was recorded by those on low incomes and Māori respondents.

Lower support for more regulations was recorded by those living in a remote rural areas, South Island rural areas with low urban influence and older rural respondents.

Regulations to Protect Environment - Summary

Thinking about whether New Zealand has the right balance between protecting the environment and promoting economic growth, do you think there should be:

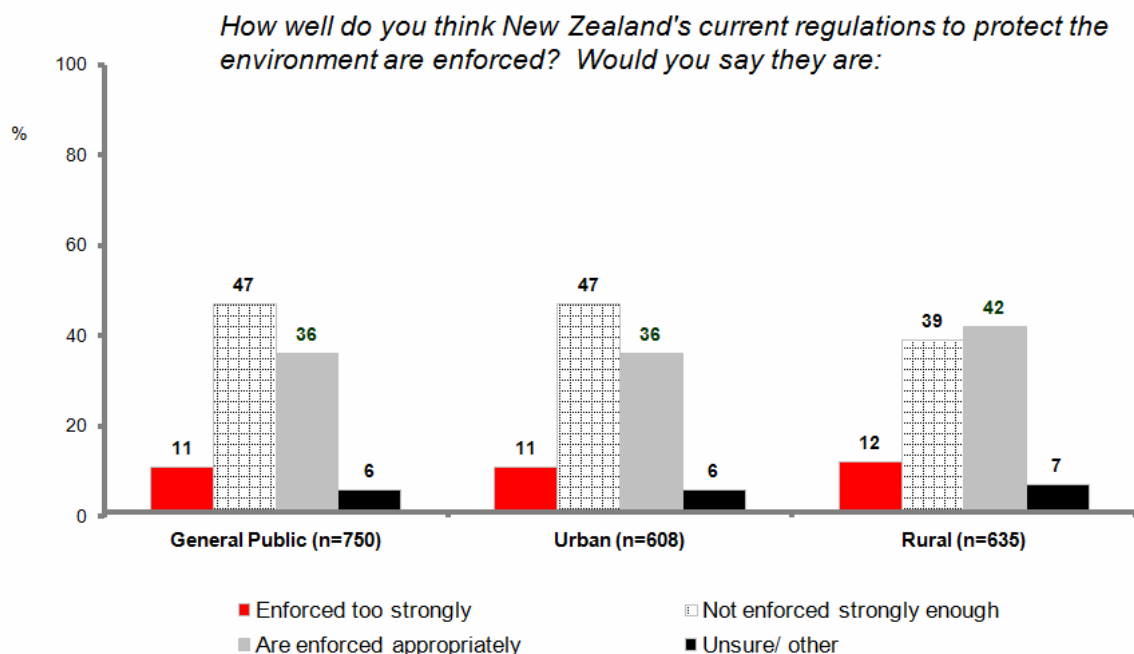


7.3.2 Enforcement of regulations

Only 11% of New Zealanders believed regulations to protect the environment were 'enforced too strongly', while 47% felt they were 'not enforced strongly enough' and 36% that they 'are enforced appropriately'. Wellingtonians and females respondents were more likely to feel that regulations were not enforced strongly enough and provincial South Islanders and males were less likely.

Rural New Zealanders were less likely (39% compared with 47% of urban respondents) to feel that regulations were 'not enforced strongly enough'. Rural residents on low incomes were more likely to feel that regulations were not enforced strongly enough.

Enforcement of Regulations - Summary



7.4 Water use

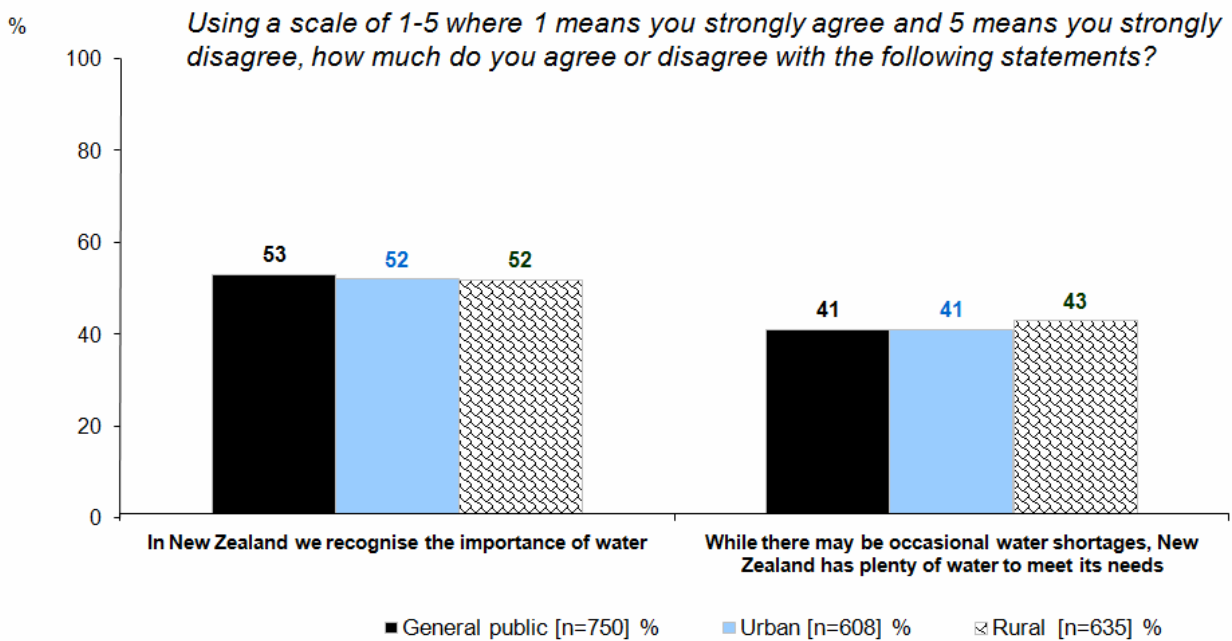
7.4.1 The importance of water

There was divided opinion on whether the importance of water was recognised by New Zealanders, with 53% agreeing that 'in New Zealand we recognise the importance of water', 26% disagreed and 20% gave a neutral response.

A related question found that 41% agreed that 'while there may be occasional water shortages, New Zealand has plenty of water to meet its needs', 30% disagreed and 27% gave a neutral response.

While there were no significant differences recorded between urban and rural respondents, older respondents were more convinced that New Zealanders knew the importance of water and that there was plenty of water to meet New Zealand's needs.

Water Use - Importance of Water Total 'agree' (1+2)



In every focus group there were participants who felt that water was an increasingly important issue. However, in the Auckland groups there was a lower degree of urgency, with many feeling there was currently enough water but with a growing population this could change very soon.

[Do you think New Zealand has an issue with water?] Yes, with weather patterns changing there's definitely a thing, whether it's a permanent feature or just the way that the world's changing and going back the other way, I don't know. But certainly with the population growing and that, Auckland needs to look at conserving water. There's not much new infrastructure being put in place to expand. (Auckland, opinion leaders, male)

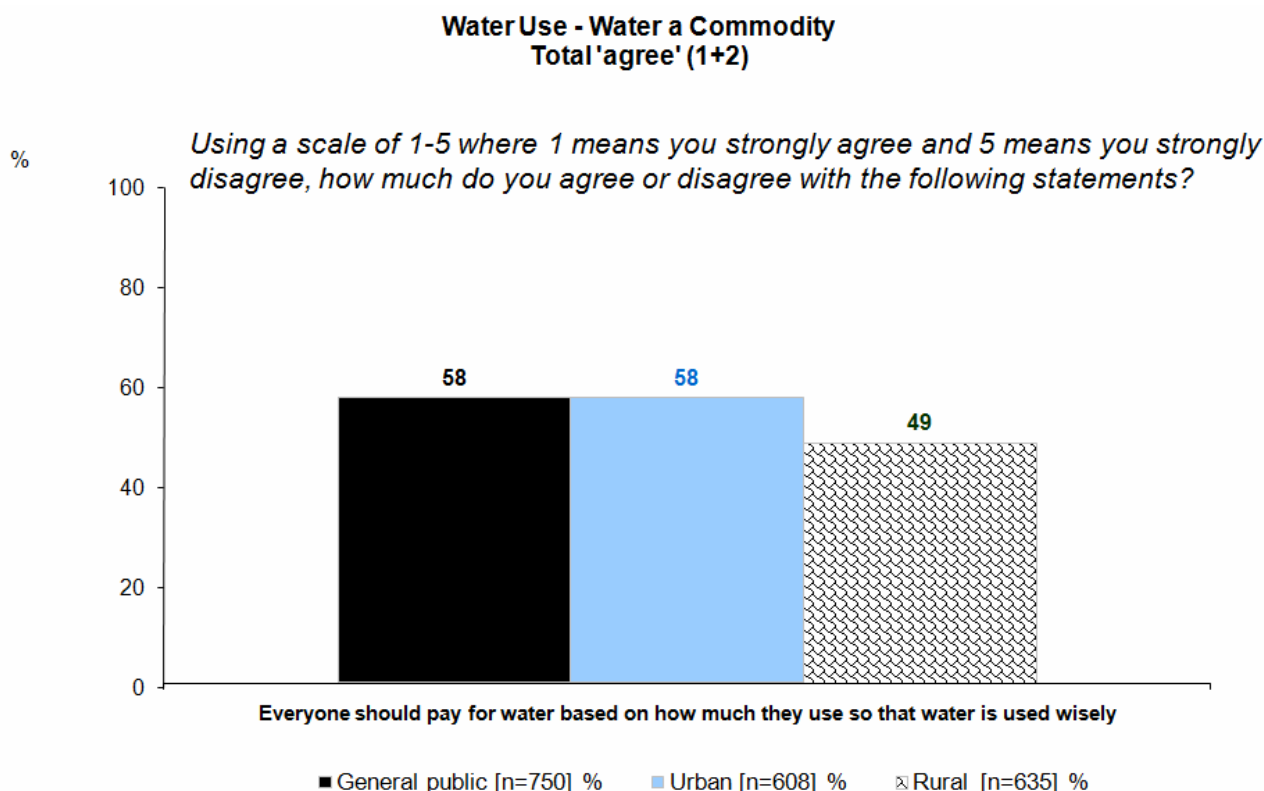
In other regions water was considered an important issue, with concern exacerbated by water restrictions during an extremely dry summer of 2008.

Farmers doing dairying in Canterbury, I think, get far too much and I think they are killing our water. We in Rangiora are on water restrictions and that's ridiculous for this time of the year. (Canterbury, rural, female)

7.4.2 Water as a commodity

58% of respondents agreed that 'everyone should pay for water based on how much they use so that water is used wisely', 24% disagreed and 17% gave a neutral response.

While rural New Zealanders were less likely to agree that 'everyone should pay for water based on how much they use so that water is used wisely', around half still agreed with this statement. Aucklanders and respondents not born in New Zealand were more likely to believe everyone should pay for water.



In the focus groups, many already viewed water as a commodity, as it was noted that most paid water use charges both in urban areas in the form of domestic water charges and in rural areas for commercial use. Some felt that domestic water users in Auckland may value water more as they pay a charge.

This might be one place where perhaps in Auckland they take it more seriously than here, because they're all virtually all metered and the grey water is metered as well. So perhaps they value it a bit higher than what we do. (Hawera, rural, female)

There were some in the groups who felt that water ownership and water charges needed to be clarified so that fair measures and prices are applied.

Well, I think it needs to be valued and then it needs to be determined who actually owns the water and a real value put on it. (Whakatane, rural, male)

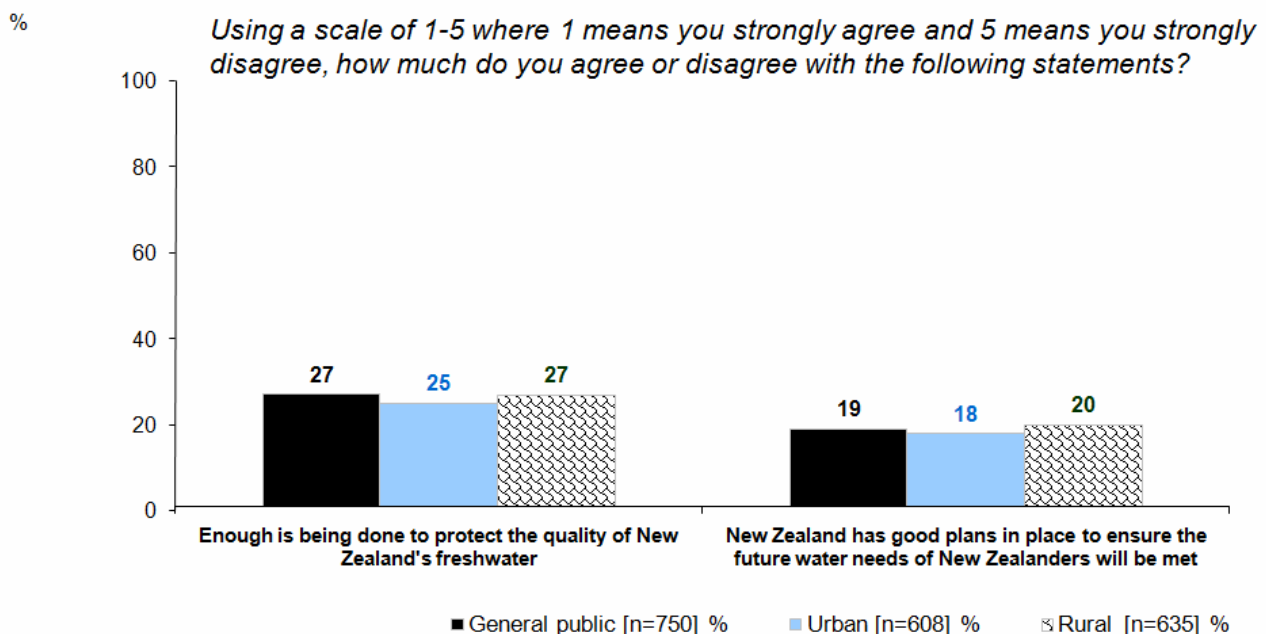
Yes, they're paying a price now but whether it's the real price of that water. If we think it's a valuable commodity, should we be giving it away cheap? (Whakatane, rural, male)

7.4.3 Planning for future water needs

27% agreed that 'enough is being done to protect the quality of New Zealand's freshwater', 44% disagreed and 25% gave a neutral response.

19% agreed that 'New Zealand has good plans in place to ensure the future water needs of New Zealanders will be met' 36% disagreed and 35% gave a neutral response.

Water Use - Planning for Future Water Needs Total 'agree' (1+2)



Most in the focus groups felt that water was going to be an increasingly important issue with a growing population and industry requirements. It was acknowledged that there needed to be fair and monitored access to water, although this was not seen to always be based on who could afford to pay for water but had to also look at the repercussions of the amount of water being used and what it was being used for.

I don't think someone with the most money should be able to access it either. (Christchurch, urban, female)

Some felt that there needed to be better future planning by councils regarding water use and that councils should carefully consider any requests for extensive irrigation schemes.

By restrictions you mean should the resource consents for irrigation be a hell of a lot tougher? Well, most people certainly think that the dairy farmers in Canterbury that are getting irrigation schemes really probably shouldn't be. (Christchurch, urban, male)

I am watching the debate around the Central Plains Irrigation scheme. I find it extraordinary that someone with enough money can come in and actually flood someone else's land in order to provide more water for cows on the Canterbury plains. (Christchurch, urban, female)

Some Cantabrians felt that heavy water use to convert land for dairy farming was having a big environmental impact and could mean the potential loss of a unique landscape.

All the braided rivers that go across the Canterbury plains absolutely need floods to keep that braided river what is a unique characteristic of this country. If we end up having heaps of irrigation taking off we are going to lose that characteristic, which is quite unique. (Christchurch, urban, female)

There's definitely room for improvement. If you talk to any salmon fisherman on the Rakaia he'll tell you that the water levels are definitely receding through irrigation and that. Maybe policies need to be put in place, but it's hard when it's your income. (Christchurch, urban, male)

A few felt that individuals also wasted a lot of water and that there should be more awareness of how precious this resource is.

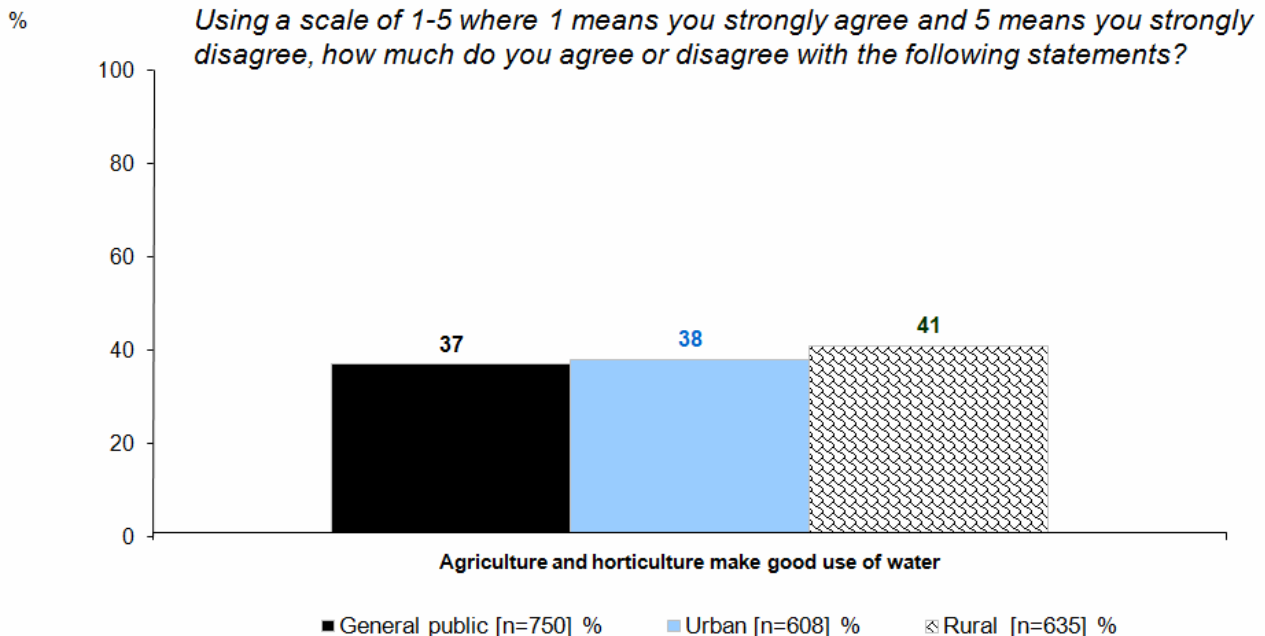
I'll just mention to you when we headed back from Australia, now our son's in Melbourne. When you shower there was a bucket and that bucket was to go and flush the loo and then they washed the clothes once a week and then they were using – just to do their dishes in it. We couldn't get over it but they were doing their bit. [Do you think people should do that here?] Well if you're in an area, I think people just turn a tap on and think it's going to keep going. (Whakatane, rural, female)

7.4.4 Agricultural and horticultural water use

37% agreed that 'agriculture and horticulture make good use of water', 19% disagreed and 37% gave a neutral response.

Rural respondents did not record significantly different scores on this indicator. However, older respondents were more likely to believe these sectors made good use of water.

Water Use by Agriculture and Horticulture Total 'agree' (1+2)



In the focus groups there were some issues raised about dairy farming impacting on water quality.

Our son, even though he wasn't particularly well, came down with nitrate poisoning out of our well and it was well over any legal limit and nobody even thought of it until I was talking to a dairy farmer one day when he said it sounded like nitrate poisoning and it was. (Canterbury, rural, male)

I've noticed, as a whitebaiter, particularly around Opotiki there, how bad the rivers are getting. When you stand in the river it will sting your skin sometimes. There's a lot of smell of what I'd say fertiliser washing into the rivers, which is killing the whitebait because we're the most heaviest populated, fertilised country in the world apparently. They just pour that much onto the ground to get growth, and the South Island guys have told me that. Since the dairy companies and the dairy herds got big in the South Island, the whitebaits and the rivers have been affected quite badly and it's got to be fertiliser, apart from what DoC pours into the bloody ground with poison. It all goes into artesian wells and water, and I've noticed with my filter – I put a filter on my water and straight away the taste came up as far as drinking goes. The jug used to be black inside when I boiled it after a few years, or a year or so it'd be a brownish colour. When you pull the filter apart it's just absolutely chocker and I'd hate to think what it does to people's guts. (Whakatane, rural, male)

There were also concerns about the amount of water used by the agriculture and horticulture sector.

They haven't got it right yet. You go through the McKenzie Country and there are huge irrigation plants. I mean McKenzie Country – trying to farm that land? There's a lack of information in the city about what is going on and all of a sudden we see all these dairy farmers, but it is to late for us to comment. (Christchurch, urban, female)

They've been irrigating flat out all the kiwifruit around us. They just keep pumping it out of the ground. (Whakatane, rural, female)

7.5 Climate change

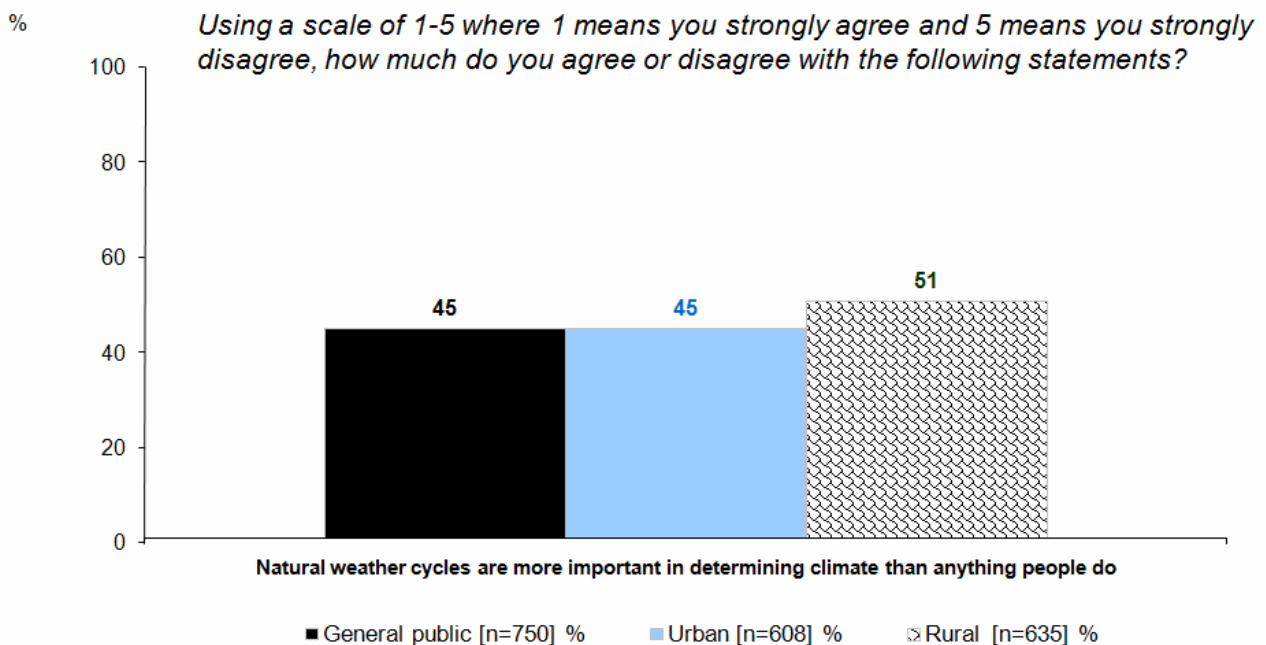
7.5.1 View of climate change

45% agreed that 'natural weather cycles are more important in determining climate than anything people do', 25% disagreed, 23% gave a neutral response.

Rural New Zealanders were more likely to agree that 'natural weather cycles are more important in determining climate than anything people do'.

There was also a trend by age, with younger respondents less likely to believe natural weather cycles determine climate change than older respondents.

View of Climate Change Total 'agree' (1+2)



Respondents in the focus groups were divided about climate change. While a majority felt that climate change was occurring, there were differing opinions regarding the cause of climate change.

I personally believe it is most definitely happening. There is a big argument to be made for how much man is contributing to it, but the fact that it is changing, I think, is indisputable but what is changing it and factors behind that can be disputed. (Auckland, opinion leaders, male)

The international scientific community is pretty much united it is happening. There are a lot of other people with vested interests one way or the other who are happy to spin statistics one way or the other. We know the planet goes through heating and cooling cycles and it strikes me as odd that we might stop rather than mitigate what the results might be or adapt. (Christchurch, urban, male)

Some felt it was difficult to have informed views on the issue as there was scientific evidence to support the hypothesis that climate change was a natural phenomenon, but likewise there was also evidence that it was caused by human activity.

I don't feel we're given enough information, but we take these leaps of judgment without knowing what we're talking about. (Christchurch, urban, female)

Some believed that humans only had a limited impact on climate change and felt it was more due to natural weather cycles.

I do believe there is climate change, but I don't think that human activity is hugely responsible, and from the research that I've seen, it's sort of less than 1% effect that we have on, like, carbon emissions for a start and I think that there's a lot of actual hype about it and it's something that we like the idea of, being better about the planet, and I think that's really important and I think fresh air and fresh water and those kinds of things are really important but I don't buy into all the hype about climate change and CO₂ emissions and what we need to do about it to make it different, and I think the planet is actually much better at sort of renewing itself than what we think it is. That's my view. And I think environmental issues are important but I think that has got crazily out of control. (Auckland, opinion leaders, female)

However, a number felt that human activity must be having some effect.

I think it's a combination of things. I think we're not helping the situation. Just the burning of fossil fuels and that is bound to add to things but I think it's not purely manmade. (Whakatane, rural, male)

[What about you?] Yes, similar to that. I mean just in my own life experience where the seasons start and finish and the temperatures and things are changing – I think climates always change through the length of time the planet's been here, but I think we are having an impact on it. [So you think humans are having an impact?] Yes I do. And whether or not human behaviour is directly related to the climate, I mean the way we're living is not sustainable. (Auckland, opinion leaders, male)

7.5.2 New Zealand role in climate change

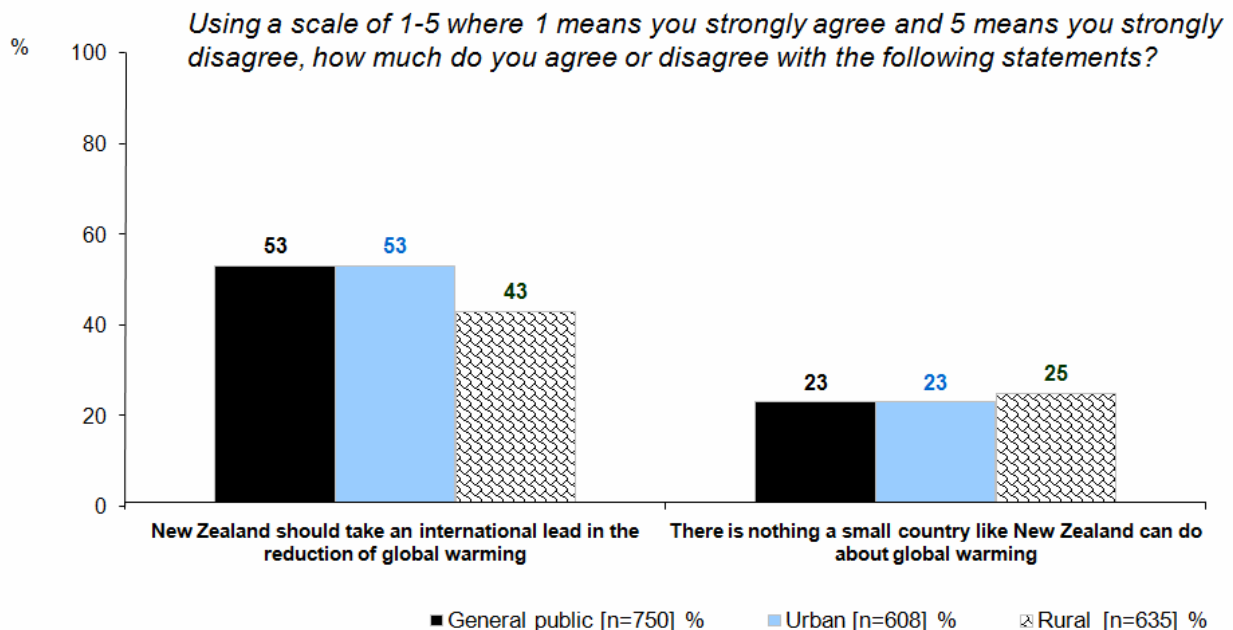
There was reasonable support for New Zealand taking an international lead on climate change. 53% agreed that 'New Zealand should take an international lead in the reduction of global warming', 25% disagreed and 20% gave a neutral response.

Rural New Zealanders recorded lower agreement that 'New Zealand should take an international lead in the reduction of global warming'. Males and older respondents were also less likely to want New Zealand to take an international lead. Females, younger and Maori respondents were more likely.

There was also a majority who felt that, even though New Zealand was a small country, there were things we can do about climate change. 23% agreed that 'there is nothing a small country like New Zealand can do about global warming', 62% disagreed and 14% gave a neutral response.

Again, males and older respondents were more likely to take the 'no action' stance, while females and younger respondents were more likely to disagree that there was nothing New Zealand can do.

Climate Change - New Zealand Role Total 'agree' (1+2)



Many in the focus groups felt that New Zealand was too small to be leaders on this issue, as it would mean greater compliance costs for New Zealand businesses, which already had a difficult time competing internationally.

We don't want to be cutting off our nose to spite our face. I mean, I don't think we should economically cripple ourselves just to say that we're doing the most. We've got a tiny effect. (Whakatane, rural, male)

I think it's beyond New Zealand's control quite honestly. We're a small fish in a very big pond. (Canterbury, rural, male)

I don't think New Zealand is going to change what's happening with the world. China and America are the people who would ultimately be the ones to change. But I think we have to be as responsible as possible, but carbon credits and all that is a bit of an over-kill for a country the size of New Zealand. (Christchurch, urban, female)

A few in the groups felt that having New Zealand take a leadership role on climate change would send a powerful signal and could shame larger nations into taking more action.

I think we do and we lead the way... [And that's a good thing?] Yes. It's like it gives us the ability to reason with others, like if China and America go "well I'm not going to do anything about it until you do" you're not going to go anywhere, whereas at least we may be small but we can say to Australia "we're doing our bit, it hasn't been that bad, pull your socks up and give it a go too". (Auckland, general public, male)

I think if enough of the smaller countries do their thing, they can bring pressure on the bigger countries. (Christchurch, urban, male)

When asked who should take responsibility for climate change, most felt that steps needed to be taken on an individual basis.

[Should New Zealand do anything about climate change?] *It's very easy to think of an individual in a small country that whatever you do is going to be insignificant but everyone has their part to play.* (Auckland, opinion leaders, male)

[Do you think New Zealand should do anything?] *I think everybody should start looking at doing a little bit of something, even if it is plant a tree or put a water bucket under your downpipe in your house or something, rather than just being apathetic enough to say "well it happened 100 years ago, it'll come right in another 100 years".* (Whakatane, rural, female)

➤ International cause of climate change

Respondents were asked to mention, in their own words, what they believe plays the biggest part in causing global warming or climate change internationally. The biggest causes of climate change internationally were seen to be industry (25%) and vehicles (22%). At much lower levels, population growth (8%), carbon emissions (7%) and deforestation (6%) were blamed for climate change.

Results among urban and rural New Zealanders were very similar. However, rural respondents were less likely to nominate carbon emissions as a cause.

CAUSE OF GLOBAL WARMING/ CLIMATE CHANGE - INTERNATIONALLY			
<i>Internationally, what do you think plays the biggest part in causing global warming or climate change?</i>			
	General Public [n=750] %	Urban [n=608] %	Rural [n=635] %
Industry	24.7	25.9	27.5
Vehicles	21.9	21.4	19.7
Population growth	8.0	8.6	7.5
Carbon emissions	7.3	8.5	2.2
Deforestation	6.1	5.7	6.1
Human activity	3.0	3.3	3.4
Pollution	2.3	2.5	1.2
Ozone	1.1	0.7	1.7
Animals	0.9	0.9	0.7
Waste	0.6	0.3	0.3
War	0.4	0.1	0.7
Horticulture practices	0.2	0.2	-
Unsure	12.4	11.3	13.2
Climate change not happening/ no-one to blame			
<i>Climate change is just part of a natural cycle</i>	7.0	6.3	11.5
<i>Don't believe the climate is changing</i>	3.7	3.8	4.3
<i>Natural occurrences - volcanic activity</i>	0.4	0.5	-
Base: All respondents			

➤ **National cause of climate change**

Respondents were asked to mention, in their own words, what they believe plays the biggest part in causing global warming or climate change in New Zealand. The biggest causes of climate change in New Zealand were seen to be vehicles (29%), industry (15%) and farm animals (12%).

Results for rural New Zealanders were slightly different, with vehicles and farm animals less likely to be nominated.

CAUSE OF GLOBAL WARMING/ CLIMATE CHANGE – NEW ZEALAND			
<i>In New Zealand, what do you think plays the biggest part in causing global warming or climate change?</i>			
	General Public [n=750] %	Urban [n=608] %	Rural [n=635] %
Vehicles	29.2	29.5	23.9
Industry	14.7	14.1	15.9
Farm animals	12.0	12.7	8.2
Deforestation	4.0	4.0	3.7
Carbon emissions	3.6	4.4	1.5
Pollution	2.9	2.8	1.5
Human activity	2.2	2.2	1.8
Population growth	1.9	1.5	3.4
Agriculture practices	0.9	0.9	0.9
Waste	0.8	0.6	0.5
Ozone	0.2	0.1	1.1
Unsure	17.2	17.7	20.6
Climate change not happening/ no-one to blame			
<i>Climate change is just part of a natural cycle</i>	6.7	5.8	10.2
<i>Don't believe the climate is changing</i>	3.5	3.4	4.4
<i>Natural occurrences - volcanic activity</i>	0.2	0.3	0.6
<i>None</i>	-	-	1.8
Base: All respondents			

VIII. Buying Local Goods

8.1 Chapter overview

- There was reasonable support for buying New Zealand made goods.
- Respondents were polarised on whether locally produced food sold in New Zealand was as good as food that was exported. Rural New Zealanders recorded similar views to the general population.
- Around a third of respondents stated a preference for having the full range and choice of food regardless of its origin.

■ Key demographic differences

- Rural New Zealanders were more likely to claim to buy local goods but younger rural respondents were less likely.
- Older respondents were more likely to agree that 'the locally produced food that is sold in New Zealand is as good as the food we export overseas', while those on high incomes were less likely.
- Those born overseas were more likely to prefer having a full range and choice of food.

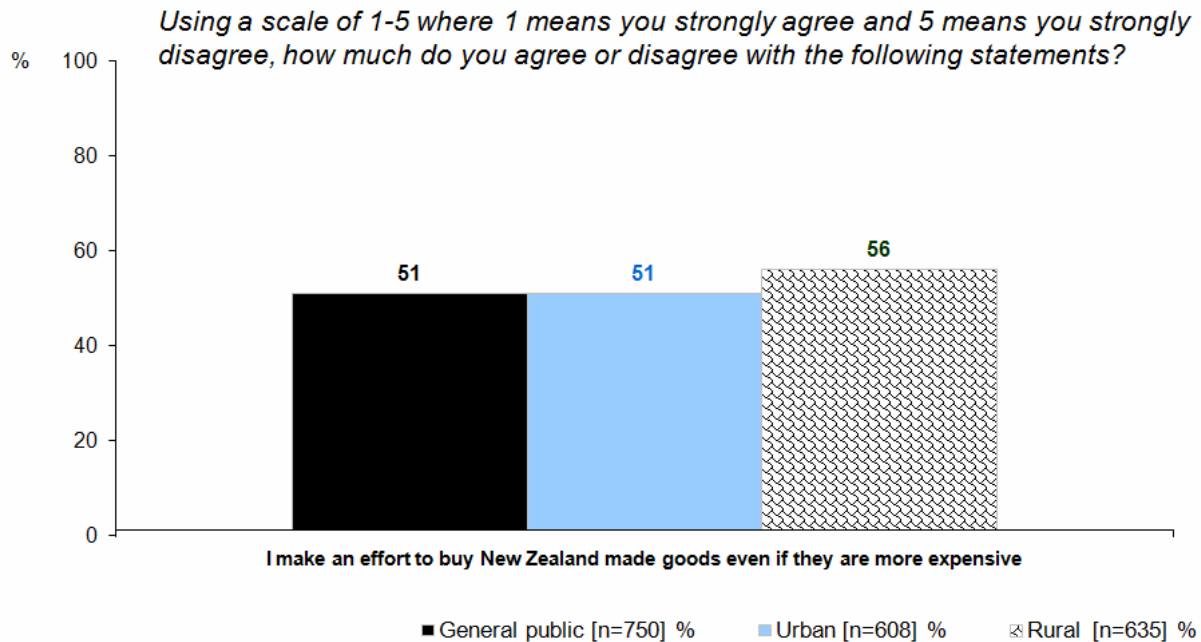
Rural New Zealanders were less likely to prefer to have the full range of food, whether it was grown in New Zealand or not.

8.2 Buying New Zealand made

There was reasonable support for buying New Zealand made goods. 51% agreed that 'I make an effort to buy New Zealand made goods even if they are more expensive', 20% disagreed, 28% gave a neutral response.

Rural respondents were more likely to claim to make an effort to 'buy New Zealand made goods even if they are more expensive'. Younger rural respondents were less likely to make an effort.

Buy New Zealand Made Total 'agree' (1+2)



In the focus groups buying locally produced food was seen to provide many personal benefits, as it was seen as likely to be fresher and taste better.

I think, when you look at the quality of the produce, and we talked about it before, we often shop in a fruit and veggie shop that a lot of it's Chinese imports and when you taste those versus tasting local stuff or stuff grown out of your own garden there's a massive difference between the quality. (Auckland, opinion leaders, male)

There was endorsement for eating seasonally, with many feeling that this provided a healthier diet.

I also like the idea of eating seasonally, so eating what's available now rather than eating imported stuff that's out of season. (Auckland, opinion leaders, female)

Some felt that it was easier to know where and how food was produced when it was grown locally.

I prefer to eat New Zealand grown because I think I know the husbandry that has gone into the food. [Plus it has got to be fresher hasn't it. (Interjection)] (Christchurch, urban, female)

And also, if you know the local grower, perhaps you know what their spray programme is or you know that they limit the amount. (Hawera, rural, female)

There were fewer air miles associated with locally produced food.

[Is it better for the environment to eat what's grown locally?] *I believe it is, definitely for the food miles, carbon, and eating seasonally.* [Why is that better?] *Because it's going to cut down on carbon emissions. As I say, eating seasonally is good for variety in your diet, isn't it?* (Auckland, opinion leaders, male)

[What about buying locally – do you think it's better for the environment?] *It should be in terms of the carbon footprint.* (Whakatane, rural, male)

Other economic benefits were raised, including the support of local businesses and helping New Zealand's balance of payments.

[Why is it better?] *You're supporting your local community.* (Auckland, general public, male)

Buying New Zealand made is keeping money in the country. (Auckland, general public, female)

However, a few noted that locally produced can sometimes be more expensive, which was difficult if finances were tight.

I heard in Australia that they only have local fruit and stuff but that means that their prices just go up and that means that people on lower incomes can't afford fruit and vegetables, so like if you do a bit of both. (Auckland, general public, female)

It's a question of budget more than anything else. We should be able to [buy locally] but it's a question of whether we can afford it. (Canterbury, rural, female)

There were also some who believed in a free-trade philosophy and, therefore, felt compelled to endorse the sale of the best and cheapest produce regardless of its origin.

If we do believe that people we export to should buy our product, why shouldn't we buy theirs? (Christchurch, urban, female)

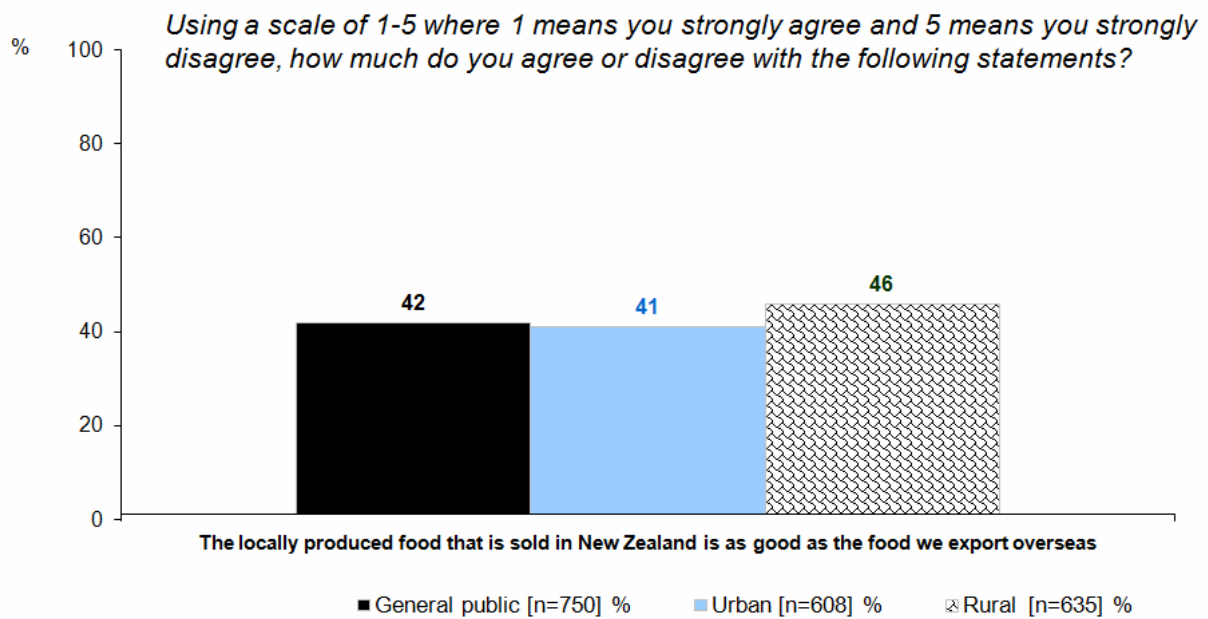
8.3 Quality of locally sold food

Respondents were divided on whether locally produced food sold in New Zealand was as good as food that was exported. 42% agreed that 'the locally produced food that is sold in New Zealand is as good as the food we export overseas', 37% disagreed, 18% gave a neutral response.

Older respondents were more likely to agree that 'the locally produced food that is sold in New Zealand is as good as the food we export overseas', while those on high incomes were less likely.

Rural respondents' views were not statistically different to the general population. Younger rural respondents were more likely to rate locally produced food as highly as that exported.

Quality of Locally Produced Food
Total 'agree' (1+2)



In the focus groups, a number felt that the best quality New Zealand food was exported and that New Zealanders often got left with the second grade produce.

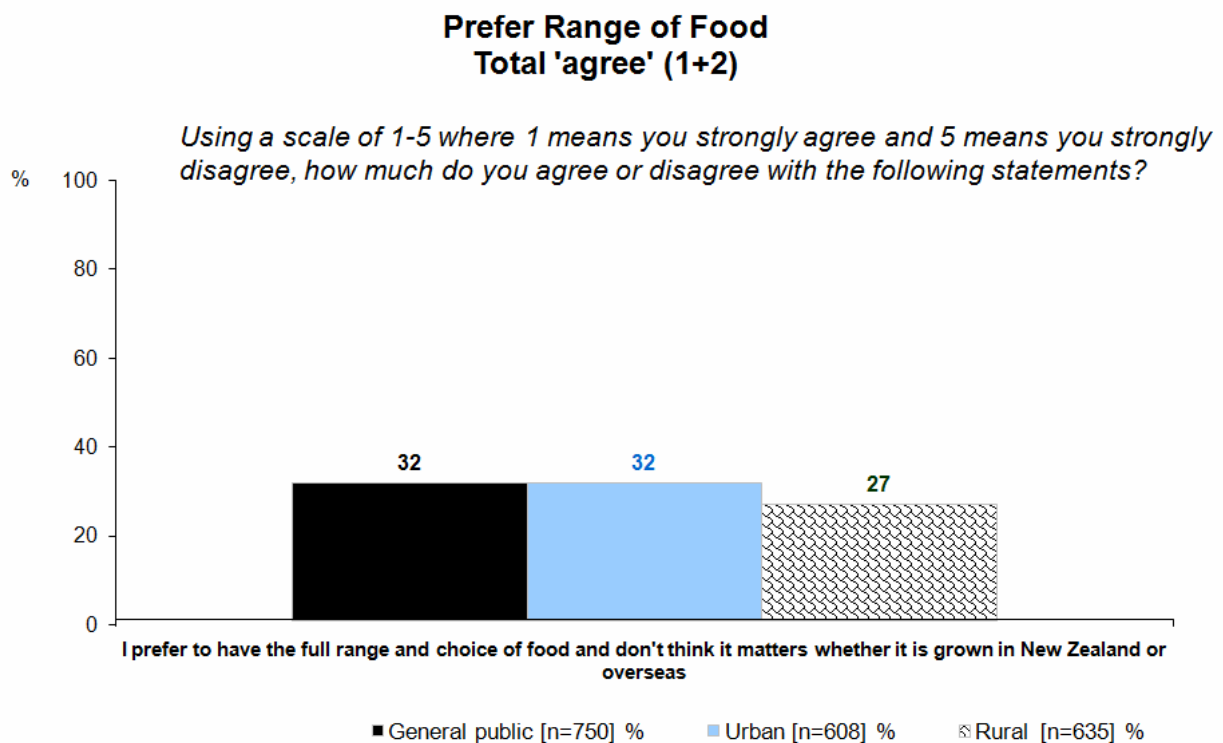
I certainly agree with supporting New Zealand because it keeps the economy going and that sort of thing. But we send a lot of our products overseas and we are left with the dregs. The ability to have access to what is good from New Zealand would benefit us a great deal where we seem to take from overseas because we can't get enough of our own products because it's going overseas where the money is being made. (Christchurch, urban, female)

8.4 Range of food

There were mixed responses voiced when respondents were asked whether they preferred having a full range and choice of food regardless of its origin. 32% agreed that 'I prefer to have the full range and choice of food and don't think it matters whether it is grown in New Zealand or overseas', 45% disagreed, 22% gave a neutral response.

Those born overseas were more likely to prefer having a full range and choice of food.

Rural New Zealanders were less likely to agree that 'I prefer to have the full range and choice of food and don't think it matters whether it is grown in New Zealand or overseas'. There was a gender difference among rural respondents, with rural males preferring to have access to the full range of food compared to rural females. Younger rural respondents were also keener to have access to the full range of food.



There was an argument for having the widest range and choice of food, especially when particular foods are out of season in New Zealand, which was only possible by buying food produced overseas as well as locally.

I think it's that seasonal thing too, different hemispheres. They all produce at different times of the year so the offshore stuff might be fresher and cheaper. (Auckland, opinion leaders, male)

IX. Animal Welfare

9.1 Chapter overview

- A majority believed farmers treat their animals well. However, respondents were more divided over whether most farmers would put caring for animals ahead of making money.
- Animals seen to be most poorly treated were poultry and pigs, with mistreatment commonly related to crowded living conditions.
- Most respondents believed that animals that live outside are healthier and have a better life.

■ Key demographic differences

- Rural New Zealanders, older respondents and those with a stronger connection to farming were more likely to believe farmers treat animals well and put animal welfare before profit.
- Rural respondents were more likely to believe outside life was better for animals.

9.2 Treatment of farm animals

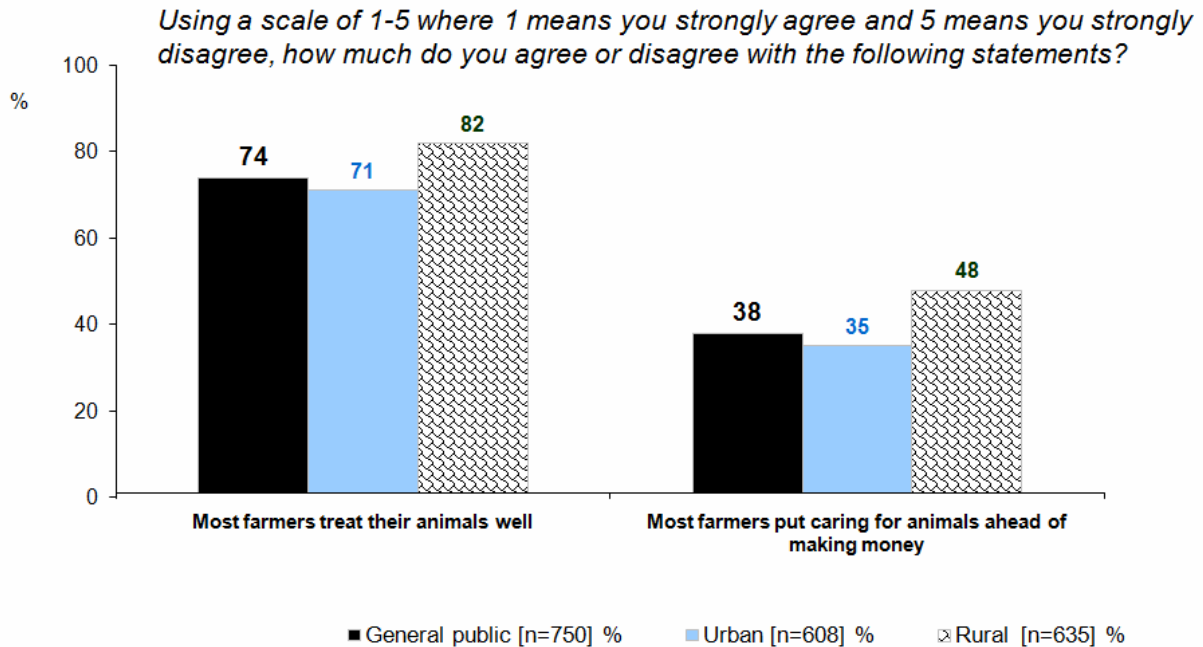
A majority believed farmers treat their animals well. 74% agreed that 'most farmers treat their animals well', 5% disagreed, 17% gave a neutral response.

However, respondents were more divided over whether most farmers would put caring for animals ahead of making money. 38% agreed that 'most farmers put caring for animals ahead of making money', 24% disagreed, 34% gave a neutral response.

Older respondents and those with a stronger connection to farming were more likely to believe farmers treat animals well and put animal welfare before profit.

Rural New Zealanders recorded significantly higher agreement when compared to urban New Zealanders on both these questions.

Animal Welfare by Farmers Total 'agree' (1+2)



In the focus groups, most participants believed that farmers generally treated their animals well. However, with the cost of farms rising, some felt that there may be pressure on farmers to push productivity. This behaviour was seen to be more likely on large farms that were focused on maximising profits.

Animal welfare – it's like for any human being – the minimum effort for the maximum return, isn't it. So, yeah, I think there would be conflict for that reason. (Canterbury, rural, male)

I think there is a conflict between corporate agriculture and the humane treatment of animals. By that, I mean farms run as a business. Corporates only have one law – make a profit. (Christchurch, urban, male)

The population is growing and people have got to be fed and there are always people prepared to do it that much cheaper, quicker – so the factory mentality. (Canterbury, rural, male)

However, most participants in the focus groups felt that it was a pragmatic choice for farmers as, if animals were treated well they were more likely to be productive. Also, with New Zealand competing internationally, it was seen as a potential competitive advantage for New Zealand farmers to be seen to treat animals well.

If you're doing it properly, the idea is to keep your stock in the best condition and make the most money. Isn't that how it's got to be? I don't think there is a conflict. (Canterbury, rural, female)

And if I think of my brother-in-law, he treats his cows really well because they're his livelihood. So he ensures he doesn't stress them, within his powers of course. (Hawera, rural, female)

I think they sit side by side, because you have to look after your animals to get a good yield. If you mistreat your animals you're not going to get the yield of the animal at the end.
(Christchurch, urban, female)

And that's going to become more important too with the welfare of animals, with overseas people, because there's nothing worse than people go down the road and they see on a cold day all these cows under the hedge shivering and standing in mud, I think that's going to be a big no-no soon. (Hawera, rural, male)

➤ **Treatment of farm animals**

Respondents who disagreed that 'most farmers treat their animals well' and/ or disagreed that 'most farmers put caring for animals ahead of making money' were asked to state, in their own words, the situations in which they saw farm animals not being treated well.

Of the types of farm animals mentioned as not being treated well, poultry was the most nominated type (39%). This was followed by pigs (20%), sheep (13%) and cows (10%).

While the types of nominated farm animals were similar for urban New Zealanders, rural residents were less likely to nominate poultry, pigs or sheep but more likely to nominate cows.

The most nominated types of mistreatment were living in cramped conditions and a lack of food and water.

MISTREATMENT OF FARM ANIMALS

In what way do you see farm animals not being treated well i.e. what situation, type of farm or type of animal?

	General Public [n=187] %	Urban [n=158] %	Rural [n=130] %
MENTION OF SPECIFIC FARM ANIMALS			
Poultry: kept in cages/battery farming	39.0	41.1	20.2
Pigs - kept in cages/battery farming	19.6	19.7	9.1
Sheep – total:	12.7	13.7	6.9
<i>Insufficient shelter in winter/ bad weather/ lambs left to die in cold</i>	7.2	7.7	4.5
<i>Sheep not treated well/ let to run unattended</i>	5.5	6.0	2.4
Cows – total:	9.7	8.2	15.2
<i>Dairy cows neglected/ not looked after properly/ poor conditions</i>	5.0	4.1	5.0
<i>Cows milked too often, treated like machines/ not fed enough</i>	2.5	2.4	9.6
<i>Calves removed from mothers too early</i>	1.8	1.7	0.3
<i>Cows not milked often enough</i>	0.4	-	0.3
Horses/cattle neglected, malnourished	7.2	6.9	8.4
TYPES OF MISTREATMENT OF FARM ANIMALS			
Livestock have insufficient food, water/ affected by drought	10.3	6.7	19.9
Small holdings/ inexperienced/ townies/ uneducated treat animals badly	5.4	5.2	7.1
Farmers put profits ahead of animal welfare	4.3	4.4	3.7
Livestock injured by farming practices (shearing, docking, dehorning)	4.2	4.3	4.2
Inhumane live transport conditions/ trucks/ ships	2.9	3.4	0.8
Large farms/ factory farms treat animals badly/ not enough staff	2.3	2.7	0.6
Insufficient shelter for livestock summer/ hot weather	2.0	1.8	3.7
Shouldn't raise animals for food	1.9	2.3	2.2
Use of chemicals/ antibiotics/ inappropriate feed	1.7	2.0	2.3
Farmers don't bring in a vet when necessary	1.6	1.3	4.5
Inappropriate animals for land e.g. dairying in Canterbury	1.1	1.3	-
Overstocking	-	-	8.7
GENERAL MISTREATMENT			
Media reports highlight mistreatment of animals	6.8	6.0	2.8
SPCA programme on TV	-	-	1.0
Have had to call SPCA myself due to poor mistreatment of animals	-	-	0.8
General abuse/ mistreatment/ neglect	-	-	2.0
<i>Continued over page</i>			

**MISTREATMENT OF FARM ANIMALS
(continued)**

In what way do you see farm animals not being treated well i.e. what situation, type of farm or type of animal?

	General Public [n=187] %	Urban [n=158] %	Rural [n=130] %
OTHER ANIMALS			
Dogs mistreated, neglected	1.8	1.6	4.7
Fish not treated well	0.5	0.6	-
POSITIVE TREATMENT			
Some well treated, some not - varies	0.6	-	2.3
Animals treated well/ better off than other parts of world	0.3	0.3	-
Base: Those who disagreed that 'Most farmers treat their animals well' OR disagreed that 'Most farmers put caring for animals ahead of making money'; multiple response			

The quantitative findings were consistent with the qualitative stage, with the animals that were seen as more prone to poor treatment being poultry, pigs and calves (veal raised). This mainly related to being raised in cramped conditions.

I think in general terms, most farmers are very concerned for their animals' welfare but, especially poultry farmers, I don't think of poultry farmers being like that, especially the battery hens. [So they're going for productivity?] Yes. (Auckland, opinion leaders, female)

I don't agree with egg farming indoors and the way they do it. I don't agree with it and battery chicks. There's no need for it. (Canterbury, rural, female)

The white veal industry in Europe where the calves are kept in boxes and fed muscle relaxant. I think that is the most gross type of indoor industry. (Christchurch, urban, female)

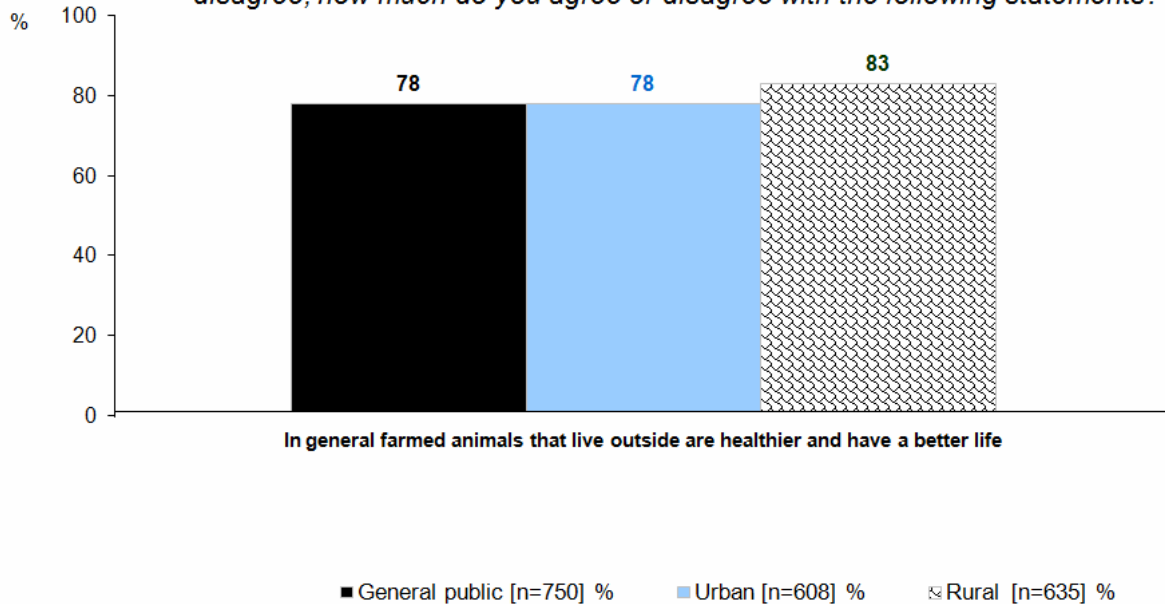
9.3 Outside life healthier

There was strong agreement that animals that live outside are healthier. 78% agreed that 'in general farmed animals that live outside are healthier and have a better life', 4% disagreed, 15% gave a neutral response.

Rural respondents were more likely to believe outside life was better for animals. South Islanders living in moderate urban influenced rural areas were less likely to agree.

Animal Welfare - Outside Healthier Total 'agree' (1+2)

Using a scale of 1-5 where 1 means you strongly agree and 5 means you strongly disagree, how much do you agree or disagree with the following statements?



Most in the focus groups felt that living outside resulted in a better quality of life for farm animals. However, this was seen as dependent on whether outdoor conditions were similar to their natural habitat.

There's a lot more disease pressure on animals that are farmed indoors. The more densely you populate animals together the more disease you get. (Whakatane, rural, male)

There were situations such as extreme weather conditions (either too hot or too cold) that were seen to make indoor farming preferable for the animals.

[And what about farming indoors versus outdoors, do you think when you farm indoors it actually is always bad for the animal?] It depends where you live. They farm indoors in places like Scandinavia because it's too cold outdoors. (Auckland, opinion leaders, female)

[How do you feel about them being raised indoors?] You could still have them indoors and treat them well, still do a good job. It's not either/or, it's the best of both. [So you don't think automatically that chickens that are raised outside are better?] Well not necessarily because potentially they aren't exposed to the elements, and the ones inside aren't necessarily treated ... just because they're inside. It's how they're treated inside. (Hawera, rural, male)

X. Segmentation Analysis

10.1 Chapter overview

- Four general public segments were identified.

Rural advocates (22%): This group makes up 22% of the population, are most positive towards rural New Zealand and tend to have strong ties or live in rural New Zealand. This segment exhibited lower concern about water. They are more likely to be male, younger and born in New Zealand.

Rurally unconnected advocates (27%): This group makes up 27% of the population. They are positive towards the three sectors tested in the research. They claim to make more effort to buy New Zealand made goods, are not that concerned about water issues and rate farmers highly on animal welfare. They are more likely to be female, older, on lower incomes and have little connection with rural New Zealand.

Provincial cynics (19%): This group makes up 19% of the population. This segment had less positive views of the three sectors. They want fewer regulations to protect the environment and do not want New Zealand to take a lead role in combating climate change. They make no special effort to buy New Zealand made goods, are unconcerned about water issues and believe that food sold in New Zealand is as good as that exported. They are more likely to be older, retired, live in provincial New Zealand and have little connection with rural New Zealand.

Rurally unconnected cynics (32%): This group makes up 32% of the population. This segment was more cynical towards the practices employed by the farming and horticulture sector. They were less likely to believe farmers put caring for animals ahead of money and that the agriculture and horticulture sectors make good use of water. They believe New Zealand can take action on climate change even though we are small and were concerned about water issues. They were more likely to be mid-aged, in professional occupations, on higher incomes, Aucklanders, to be born overseas and to have little connection with rural New Zealand.

10.2 General public segmentation

10.2.1 Rural advocates (22%)

This group makes up 22% of the population, is most positive towards rural New Zealand and tends to have strong ties or live in rural New Zealand. This segment exhibited lower concern about water. They are more likely to be male, younger and born in New Zealand.

➤ **Attitudes to urban and rural New Zealand**

- More likely for view of rural NZ to have become more positive over the past five years
- More likely to view New Zealand as world leader in: farming, horticulture.

➤ **Attitudes to other issues**

- Less likely to agree:
 - 'While there maybe occasional water shortages, New Zealand has plenty of water to meet its needs'.

➤ **Characteristics**

- More likely to be male
- More likely to be younger (18-29 years)
- More likely to be born in New Zealand
- More likely to be in full-time work
- More likely to live in provincial/ rural New Zealand
- Rural connection:
 - More likely to work rural or both rural/ urban
 - If urban: more likely to visit rural friends and family
 - More likely to have family or friends who work in: farming, forestry, horticulture
 - More likely to have worked in: farming, forestry, horticulture.

10.2.2 Rurally unconnected advocates (27%)

This group makes up 27% of the population. They are positive towards the three sectors tested in the research. They claim to make more effort to buy New Zealand made goods, are not that concerned about water issues and rate farmers highly on animal welfare. They are more likely to be female, older, on lower incomes and have little connection with rural New Zealand.

➤ Attitudes to urban and rural New Zealand

- More likely to view all sectors as significant in generating income for NZ
- More likely to have a positive view of all sectors
- More likely to view NZ as a world leader in farming, forestry, horticulture sectors
- More likely to agree:
 - [Urban] 'Everyone in New Zealand should have reasonable access to services regardless of where they live and how much it costs to provide'
 - [Urban] 'I don't mind paying a bit more for services if this means rural people can access them at a reasonable cost'
- More likely to agree expansion of farming, forestry, horticulture sectors is good for NZ.

➤ Attitudes to other issues

- More likely to agree:
 - 'While there maybe occasional water shortages, New Zealand has plenty of water to meet its needs'
 - 'Everyone should pay for water based on how much they use so that water is used wisely'
 - 'In New Zealand we recognise the importance of water'
 - 'Agriculture and horticulture make good use of water'
 - 'Enough is being done to protect the quality of New Zealand's freshwater'
 - 'I make an effort to buy New Zealand made goods even if they are more expensive'
 - 'The locally produced food that is sold in New Zealand is as good as the food we export overseas'
 - 'Most farmers treat their animals well'
 - 'Most farmers put caring for animals ahead of making money'.

➤ Characteristics

- More likely to be female
- More likely to be older (60+)
- More likely to be lower income
- Rural connection
 - Less likely to have family or friends who work in: forestry, horticulture
 - Less likely to have worked in: farming, forestry, horticulture.

10.2.3 Provincial cynics (19%)

This group makes up 19% of the population. This segment had less positive views of the three sectors. They want fewer regulations to protect the environment and do not want New Zealand to take a lead role in combating climate change. They make no special effort to buy New Zealand made goods, are unconcerned about water issues and believe that food sold in New Zealand is as good as that exported. They are more likely to be older, retired, live in provincial New Zealand and have little connection with rural New Zealand.

➤ Attitudes to urban and rural New Zealand

- Less likely to view farming, forestry, horticulture, fishing, tourism sectors as significant in generating income for NZ
- Less likely to have a positive view of farming, forestry, horticulture, tourism sectors
- Less likely to view NZ as world leader in farming, forestry, horticulture sectors
- Less likely to agree:
 - 'People should pay the true costs of providing services even if people in some areas have to pay more than others'.

➤ Attitudes to other issues

- Would like to see fewer regulations
- Less likely to agree:
 - 'New Zealand should take an international lead in the reduction of global warming'
 - 'Everyone should pay for water based on how much they use so that water is used wisely'
 - 'I make an effort to buy New Zealand made goods even if they are more expensive'
- More likely to agree:
 - 'Enough is being done to protect the quality of New Zealand's freshwater'
 - 'The locally produced food that is sold in New Zealand is as good as the food we export overseas'.

➤ Characteristics

- More likely to be older (60+)
- More likely to be retired
- More likely to live in provincial/ rural New Zealand
- Rural connection
 - Less likely to have family or friends that work in: farming, forestry, horticulture
 - Less likely to have ever worked in forestry.

10.2.4 Rurally unconnected cynics (32%)

This group makes up 32% of the population. This segment was more cynical towards the practices employed by the farming and horticulture sector. They were less likely to believe farmers put caring for animals ahead of money and that the agriculture and horticulture sectors make good use of water. They believe New Zealand can take action on climate change even though we are small and are concerned about water issues. They were more likely to be middle-aged, in professional occupations, on higher incomes, Aucklanders, to be born overseas and to have little connection with rural New Zealand.

➤ Attitudes to urban and rural New Zealand

- Less likely to view manufacturing sector as significant in generating income for NZ
- Less likely to view NZ as a world leader in forestry sector
- Less likely to agree:
 - 'Everyone in New Zealand should have reasonable access to services regardless of where they live and how much it costs to provide'.

➤ Attitudes to other issues

- Less likely to agree:
 - 'There is nothing a small country like New Zealand can do about global warming'
 - 'Natural weather cycles are more important in determining climate than anything people do'
 - 'Enough is being done to protect the quality of New Zealand's freshwater'
 - 'In New Zealand we recognise the importance of water'
 - 'Agriculture and horticulture make good use of water'
 - 'Most farmers put caring for animals ahead of making money'.

➤ Characteristics

- More likely to be mid-aged (30-44 years)
- More likely to be born overseas
- More likely to be professionals
- More likely to be higher income
- More likely to live in Auckland
- Rural connection
 - More likely to work urban
 - If urban: Less likely to visit rural friends and family
 - Less likely to have family or friends that work in: farming, forestry, horticulture
 - Less likely to have ever worked in: farming, forestry, horticulture.

XI. Appendix

11.1 Questionnaire

Final6

Beliefs and Values Survey - May 2008

Int ID _____ Market _____
Phone no. _____ Sex Male 1
Female ... 2
Date _____
Start time _____ Finish time _____
Call 1 2 3 4

INTRO [You have called: %KEY% in market: %MARKET%]

SEX INTERVIEWER: Enter sex of respondent (12) SP
Male.....1
Female.....2

F1 Firstly, we need to make sure that we speak to people of all different ages. What age group are you in?
Please stop me when I read out the appropriate age group.
[READ LIST]

(16) SP

18-19.....1
20-24.....2
25-29.....3
30-34.....4
35-39.....5
40-44.....6
45-49.....7
50-54.....8
55-59.....9
60-64.....0
65-69.....1
70-74.....2
75 Plus.....3
[DO NOT READ] Refused.....4 TERMINATE

Q0 Do you live in a city, town or rural area?
[DO NOT READ]

(18) SP

City.....1
Town.....2
Rural.....3
[DO NOT READ] Unsure.....4 TERMINATE

Q1 Were you born in New Zealand?
[DO NOT READ]

(19) SP

Yes.....1
No.....2

IF Q1='Yes' ASK Q2

Q2 Where did you (mainly) grow up?
[READ LIST]

(20) SP

Urban New Zealand.....1
Rural New Zealand.....2
Both.....3
Overseas.....4
[DO NOT READ] Unsure.....5

ASK ALL

Q3 What is your current work status? Are you working full-time,
part-time or are you retired?
[IF SELF-EMPLOYED ASK WHETHER FULL TIME OR PART TIME]
[DO NOT READ]

(21) SP

Full time paid work.....1
Part-time paid work.....2
Retired.....3
Not working - stay at home mum/ dad.....4
Not working - other.....5
Unemployed.....6
Student.....7
Volunteer.....8
Refused.....9

IF Q3='Full time paid work' OR Q3='Part-time paid work' ASK Q4

Q4 Where do you (mainly) work?
[READ LIST]

(22) SP

Urban New Zealand.....1
Rural New Zealand.....2
Both.....3
[DO NOT READ] Other.....4

IF Q0='City' OR Q0='Town' ASK Q5

Q5 Do you often visit family or close friends that live in rural New
Zealand?
[DO NOT READ]

(23) SP

Yes.....1
No.....2

IF Q0='Rural' ASK Q6

Q6 Do you often visit family or close friends that live in urban New
Zealand?
[DO NOT READ]

(24) SP

Yes.....1
No.....2

ASK ALL

Q7	Do you have family or close friends that work in the following industries?				
	[RANDOMIZE]				
		Farming (25)	Forestry (26)	Horticulture (27)	SP
Yes.....		1	1	1	
No.....		2	2	2	
[DO NOT READ]					
Unsure.....		3	3	3	

IF Q0='Rural' ASK Q8AR, Q8BR, Q8CR, Q8DR

Q8AR What do you think are the GOOD things about living in RURAL New Zealand?
[RECORD FULL VERBATIMS]

(28-47)

Q8BR What do you think are the BAD things about living in RURAL New Zealand?
[RECORD FULL VERBATIMS]

(48-67)

Q8CR Even though you live in a RURAL area, what do you think are the GOOD things about living in URBAN New Zealand?
[RECORD FULL VERBATIMS]

(8-27)

Q8DR Even though you live in a RURAL area, what do you think are the BAD things about living in URBAN New Zealand?
[RECORD FULL VERBATIMS]

(28-47)

IF Q9A='1 - Very seriously' OR Q9A='2' ASK Q9C

Q9C Which, if any, of the following sectors would you like to work in:
[MULTI]
[READ LIST]

(70) MP

Farming.....1
Horticulture.....2
Forestry.....3
[DO NOT READ] Unsure.....4
Other (specify) 5

IF Q4='Urban New Zealand' AND Q0='Rural' ASK Q10

Q10 Using a 1 to 5 scale where 1 means very seriously and 5 means not seriously at all - how seriously would you consider working in rural New Zealand?
[DO NOT READ]

(28) SP

1 - Very seriously.....1
2.....2
3.....3
4.....4
5 - Not seriously at all.....5
Unsure.....6

IF Q10='1 - Very seriously' OR Q10='2' ASK Q10A

Q10A Which, if any, of the following sectors would you like to work in:
[MULTI]
[READ LIST]

(29) MP

Farming.....1
Horticulture.....2
Forestry.....3
[DO NOT READ] Unsure.....4
Other (specify) 5

IF (Q4='Rural New Zealand') AND (Q0='City' OR Q0='Town') ASK Q11

Q11 Using a 1 to 5 scale where 1 means very seriously and 5 means not seriously at all - how seriously would you consider moving to live in rural New Zealand?
[DO NOT READ]

(50) SP

1 - Very seriously.....1
2.....2
3.....3
4.....4
5 - Not seriously at all.....5
Unsure.....6

IF Q4='Rural New Zealand' AND Q0='Rural' ASK Q12, Q12A

Q12 Using a 1 to 5 scale where 1 means very seriously and 5 means not seriously at all - how seriously would you consider moving to live in urban New Zealand?
[DO NOT READ]

(51) SP

1 - Very seriously.....1
2.....2
3.....3
4.....4
5 - Not seriously at all.....5
Unsure.....6

Q12A Using a 1 to 5 scale where 1 means very seriously and 5 means not seriously at all - how seriously would you consider moving to work in urban New Zealand?
[DO NOT READ]

(52) SP

1 - Very seriously.....1
2.....2
3.....3
4.....4
5 - Not seriously at all.....5
Unsure.....6

ASK ALL

Q13 Has your view of rural New Zealand become more positive or more negative over the past five years or is it unchanged?
[DO NOT READ]

(53) SP

More positive.....1
More negative.....2
Unchanged.....3
Unsure.....4

IF Q13='More positive' ASK Q14A

Q14A In what way has your view become more positive?
[PROBE]

(54-73)

IF Q13='More negative' ASK Q14B

Q14B In what way has your view become more negative?
[PROBE]

(8-27)

ASK ALL

Q15 Using a 1 to 5 scale where 1 means very significant and 5 means not significant at all - how significant are the following sectors in generating money for New Zealand?
[RANDOMIZE]

	Farming (28)	Forestry (29)	Horticulture (30)	Energy (31)	Fishing (32)	Tourism (33)	Manufacturing (34)	SP
1 - Very significant.....	1	1	1	1	1	1	1	
2.....	2	2	2	2	2	2	2	
3.....	3	3	3	3	3	3	3	
4.....	4	4	4	4	4	4	4	
5 - Not significant at all	5	5	5	5	5	5	5	
[DO NOT READ]								
Unsure.....	6	6	6	6	6	6	6	

	Film Industry (35)	SP
1 - Very significant.....	1	
2.....	2	
3.....	3	
4.....	4	
5 - Not significant at all	5	
[DO NOT READ]		
Unsure.....	6	

Q16 Using a 1 to 5 scale where 1 means very positive and 5 means very negative - what is your opinion of the following sectors?
[RANDOMIZE]

	Farming (36)	Forestry (37)	Horticulture (38)	Tourism (39)	SP
1 - Very positive.	1	1	1	1	
2.....	2	2	2	2	
3.....	3	3	3	3	
4.....	4	4	4	4	
5 - Very negative.	5	5	5	5	
[DO NOT READ]					
Unsure.....	6	6	6	6	

IF Q16(1)='1 - Very positive' ASK Q17A

Q17A Why do you have a positive view of the Farming sector, what are your reasons?
[PROBE]
[MULTI]
[PRE-CODES: DO NOT READ]

(40) MP

Backbone of New Zealand.....1
Good for economy.....2
Family orientated.....3
Opportunities.....4
Good quality products.....5
Good animal welfare.....6
Innovative/ diversified/ valuable.....7
Supports other industries.....8
Hardworking.....9
Honesty/ Integrity.....0
Produces food for New Zealand.....1
Unsure.....2
Other (specify) 3

IF Q16(1)='4', '5' - negative' ASK Q17B

Q17B Why do you have a negative view of the Farming sector, what are your reasons?
[PROBE]
[MULTI]
[PRE-CODES: DO NOT READ]

(62) MP

Self-interested/ profit seeking/ Just want to make money.....1
Bad environmental record - general.....2
Using sprays/ fertilizers.....3
Using hormones/ antibiotics.....4
Run off into waterways/ rivers.....5
Methane gases (climate change).....6
Drain on natural resources (water).....7
Drain on natural resources (land).....8
Unsure.....9
Other (specify) 0

IF Q16(2)='1 - Very positive' ASK Q17C

Q17C Why do you have a positive view of the Forestry sector, what are your reasons?
[PROBE]
[MULTI]
[PRE-CODES: DO NOT READ]

(28) MP

Long term advantages / investment.....1
Helps build New Zealand.....2
Erosion control/ Prevents land slips.....3
Hardworking.....4
Carbon credits.....5
Timber exports.....6
Good for economy.....7
Employment opportunities for rural areas.....8
Unsure.....9
Other (specify) 0

IF Q16(2)= '4', '5' - negative' ASK Q17D

Q17D Why do you have a negative view of the Forestry sector, what are your reasons?
[PROBE]
[MULTI]
[PRE-CODES: DO NOT READ]

(50) MP

Land being converted to dairy.....1
Deforestation.....2
Sucks nutrients from land.....3
Land owners not trustworthy.....4
Foreign ownership/ Money goes offshore.....5
Poor health and safety / Drug use by workers.....6
Unsure.....7
Other (specify) 8

IF Q16(3)='1 - Very positive' ASK Q17E

Q17E Why do you have a positive view of the Horticulture sector, what are your reasons?
[PROBE]
[MULTI]
[PRE-CODES: DO NOT READ]

(71) MP

Scientific innovation.....1
Increase in organic farming.....2
Growing specialist produce.....3
Good for economy/ Exporting produce.....4
Hardworking.....5
Unsure.....6
Other (specify) 7

IF Q16(3)= '4', '5' - negative' ASK Q17F

Q17F Why do you have a negative view of the Horticulture sector, what are your reasons?
[PROBE]
[MULTI]
[PRE-CODES: DO NOT READ]

(28) MP

Industry facing tough times.....1
Many exiting/ lack of new people joining.....2
Limited resources.....3
Top heavy/ Too much bureaucracy.....4
Competitive/ cut-throat.....5
Vulnerable to weather.....6
Staff issues.....7
Biosecurity issues.....8
Bad environmental record - general.....9

(29) MP

Bad for environment - Heavy water use.....0
Bad for environment - Use of pesticides/ hormones1
Genetic modification.....2
Unsure.....3
Other (specify) 4

ASK ALL

Q18 Using a scale of 1-5 where 1 means you strongly agree and 5 means that you strongly disagree, how much do you agree or disagree with the following statements.

[RANDOMIZE]

- 1- New Zealand is a world leader in farming
- 2- New Zealand is a world leader in horticulture
- 3- New Zealand is a world leader in forestry

	-1- (50)	-2- (51)	-3- (52)	SP
1 - Strongly agree	1	1	1	
2.....	2	2	2	
3.....	3	3	3	
4.....	4	4	4	
5 - Strongly disagree.....	5	5	5	
[DO NOT READ]				
Unsure.....	6	6	6	

Q21 What are the most important environmental issues facing New Zealand today?

[IF RESPONDENT SAYS 'WATER' PROBE TO TYPE OF WATER PROBLEM I.E. WATER AVAILABILITY/ SHORTAGE, WATER QUALITY ETC.]

[DO NOT READ]

[FIRST MENTION ONLY]

[PRE-CODES]

	(53)	SP
Pollution (water)/ Water quality.....	1	
Waste disposal.....	2	
Global warming/Climate change.....	3	
Pollution (air)/ Air quality.....	4	
Water availability/ Water shortage.....	5	
Runoff from agricultural land use.....	6	
Genetic modification/ Genetic engineering.....	7	
Urban development.....	8	
Sewage discharge.....	9	
	(54)	SP
Unsure^s.....	0	
Refused^s.....	1	
None^s.....	2	
Other (specify)	3	

IF Q21='Unsure' OR Q21='Refused' OR Q21='None' SKIP Q21A

Q21A	What others can you name? [MULTI] [IF RESPONDENT SAYS 'WATER' PROBE TO TYPE OF WATER PROBLEM I.E. WATER AVAILABILITY/ SHORTAGE, WATER QUALITY ETC.] [DO NOT READ] [ALL OTHER MENTIONS] [PRECODES]
	(75) MP
	Pollution (water)/ Water quality.....1
	Waste disposal.....2
	Global warming/Climate change.....3
	Pollution (air)/ Air quality.....4
	Water availability/ Water shortage.....5
	Runoff from agricultural land use.....6
	Genetic modification/ Genetic engineering.....7
	Urban development.....8
	Sewage discharge.....9
	(76) MP
	Unsure^s.....0
	Refused^s.....1
	None^s.....2
	Other (specify) 3

ASK ALL

Q22	Internationally, what do you think plays the biggest part in causing global warming or climate change? [IF RESPONDENT SAYS 'POLLUTION' PROBE TO POLLUTION TYPE I.E. POLLUTION FROM MOTOR VEHICLES, FARM ANIMALS, OR MANUFACTURING INDUSTRY ETC.] [DO NOT READ] [PRE-CODES]
	(28) SP
	Population growth.....1
	Motor vehicles.....2
	Manufacturing/Industry.....3
	Farm animals.....4
	Cutting down trees - deforestation.....5
	Don't believe the climate is changing.....6
	Climate change is just part of a natural cycle...7
	[DO NOT READ] Unsure.....8
	Other (specify) 9

Q23 In New Zealand, what do you think plays the biggest part in causing global warming or climate change?
[IF RESPONDENT SAYS 'POLLUTION' PROBE TO POLLUTION TYPE I.E. POLLUTION FROM MOTOR VEHICLES, FARM ANIMALS, OR MANUFACTURING INDUSTRY ETC.]
[DO NOT READ]
[PRE-CODES]

(49) SP

Population growth.....1
Motor vehicles.....2
Manufacturing/Industry.....3
Farm animals.....4
Cutting down trees - deforestation.....5
Don't believe the climate is changing.....6
Climate change is just part of a natural cycle...7
[DO NOT READ] Unsure.....8
Other (specify) 9

Q24 Thinking about whether New Zealand has the right balance between protecting the environment and promoting economic growth, do you think there should be:
[READ LIST]
[RANDOMIZE LIST]

(70) SP

More regulations to protect the environment.....1
Less regulations to protect the environment.....2
The current balance is about right.....3
[DO NOT READ] Unsure.....4
Other (specify) 5

Q25 How well do you think New Zealand's current regulations to protect the environment are enforced? Would you say they are:
 [READ LIST]
 [RANDOMIZE LIST]

(28) SP

Enforced too strongly.....1
 Not enforced strongly enough.....2
 Are enforced appropriately.....3
 [DO NOT READ] Unsure.....4
 Other (specify) 5

Q24B Using a scale of 1-5 where 1 means you strongly agree and 5 means that you strongly disagree, how much do you agree or disagree with the following statements.
 [RANDOMIZE]

- 1- There is nothing a small country like New Zealand can do about global warming
- 2- Natural weather cycles are more important in determining climate than anything people do
- 3- New Zealand should take an international lead in the reduction of global warming
- 4- Enough is being done to protect the quality of New Zealand's freshwater
- 5- While there may be occasional water shortages, New Zealand has plenty of water to meet its needs
- 6- New Zealand has good plans in place to ensure the future water needs of New Zealanders will be met
- 7- Agriculture and horticulture make good use of water
- 8- In New Zealand we recognise the importance of water
- 9- Everyone should pay for water based on how much they use so that water is used wisely
- 10- I make an effort to buy New Zealand made goods even if they are more expensive
- 11- I prefer to have the full range and choice of food and don't think it matters whether it is grown in New Zealand or overseas
- 12- The locally produced food that is sold in New Zealand is as good as the food we export overseas

	(59)	(60)	(61)	(62)	(63)	SP
1 - Strongly agree	1	1	1	1	1	
2.....	2	2	2	2	2	
3.....	3	3	3	3	3	
4.....	4	4	4	4	4	
5 - Strongly disagree.....	5	5	5	5	5	
[DO NOT READ]						
Unsure.....	6	6	6	6	6	

- Q24C Using a scale of 1-5 where 1 means you strongly agree and 5 means that you strongly disagree, how much do you agree or disagree with the following statements.
[RANDOMIZE]
- 1- If the rural sector is doing well people in the urban sector will be better off [CITY OR TOWN ONLY]
 - 2- Rural New Zealanders understand the importance of urban New Zealand [CITY OR TOWN ONLY]
 - 3- If the urban sector is doing well people in the rural sector will be better off [RURAL ONLY]
 - 4- Urban New Zealanders understand the importance of rural New Zealand [RURAL ONLY]
 - 5- Everyone in New Zealand should have reasonable access to services regardless of where they live and how much it costs to provide
 - 6- People should pay the true costs of providing services even if people in some areas have to pay more than others
 - 7- I don't mind paying a bit more for services if this means rural people can access them at a reasonable cost [CITY OR TOWN ONLY]

	(64)	(65)	(66)	(67)	(68)	(69)	(70)	SP
1 - Strongly agree	1	1	1	1	1	1	1	
2.....	2	2	2	2	2	2	2	
3.....	3	3	3	3	3	3	3	
4.....	4	4	4	4	4	4	4	
5 - Strongly disagree.....	5	5	5	5	5	5	5	
[DO NOT READ]								
Unsure.....	6	6	6	6	6	6	6	

- Q24D Using a scale of 1-5 where 1 means you strongly agree and 5 means that you strongly disagree, how much do you agree or disagree with the following statements.
[RANDOMIZE]
- 1- In general farmed animals that live outside are healthier and have a better life
 - 2- Most farmers treat their animals well
 - 3- Most farmers put caring for animals ahead of making money
 - 4- Expansion of the farming sector in the future is good for New Zealand
 - 5- Expansion of the horticulture sector in the future is good for New Zealand
 - 6- Expansion of the forestry sector in the future is good for New Zealand

	(71)	(72)	(73)	(74)	(75)	(76)	SP
1 - Strongly agree	1	1	1	1	1	1	
2.....	2	2	2	2	2	2	
3.....	3	3	3	3	3	3	
4.....	4	4	4	4	4	4	
5 - Strongly disagree.....	5	5	5	5	5	5	
[DO NOT READ]							
Unsure.....	6	6	6	6	6	6	

IF (Q24D(3)='4' OR Q24D(3)='5 - Strongly disagree') OR (Q24D(2)='4' OR Q24D(2)='5 - Strongly disagree') ASK Q24DI

Q24DI In what way do you see farm animals not being treated well i.e. what situation, type of farm or type of animal?
[PROBE] (8-27)

ASK ALL

Q28 Which of the following statements best describes your current financial situation?
[READ LIST]

- (28) SP
- I am comfortable financially.....1
 - I could do with more money but have enough to get by.....2
 - I have difficulty making ends meet.....3
 - [DO NOT READ] Unsure.....4
 - [DO NOT READ] Refused.....5
-

These last questions are for statistical purposes only, to make sure we have an accurate sample.

Once again I would like to remind you that any information you give me is confidential

IF Q3='Full time paid work' OR Q3='Part-time paid work' ASK F2

F2 What is your occupation? (8-27)

ASK ALL

F3 What is the approximate combined before tax income in your household. Please stop me when I read out the appropriate income range.
[READ LIST]

- (28) SP
- \$20,000 or less.....1
 - \$20,001-30,000.....2
 - \$30,001-40,000.....3
 - \$40,001-50,000.....4
 - \$50,001-70,000.....5
 - \$70,001-100,000.....6
 - More than \$100,000.....7
 - Income was nil/or made a loss.....8
 - [DO NOT READ] Refused.....9
-

F4 How many people 18 years of age or older are currently living in your household, including yourself?
[DO NOT READ]

(29) SP

- 1.....1
- 2.....2
- 3.....3
- 4.....4
- 5 or more.....5
- Unsure.....6
- Refused.....7

F5 Which of the following ethnic groups do you belong to? One or several groups may apply to you.
[CODE ALL THAT APPLY]
[READ LIST]

(30) MP

- NZ Maori.....1
- NZ European.....2
- British.....3
- Other European.....4
- Pacific Island.....5
- Chinese.....6
- Indian.....7
- Other Asian.....8
- Other (specify) 9

F8 Which of the following best describes your household situation?
[READ LIST]

(51) SP

- Young couple with no children.....1
- Family with mainly pre-school children.....2
- Family with mainly school age children.....3
- Family with mainly adult children.....4
- Older couple with no children at home.....5
- Single older person.....6
- Single younger person.....7
- Flatting with others.....8
- [DO NOT READ] Unsure.....9

(52) SP

- [DO NOT READ] Refused.....0
- Other (specify) 1

F9 Do you currently or have you ever worked in the following industries?
[RANDOMIZE]

	Farming (73)	Forestry (74)	Horticulture (75)	SP
Yes.....	1	1	1	
No.....	2	2	2	
[DO NOT READ]				
Unsure.....	3	3	3	

NAME Occasionally our supervisors call to ensure I have done the interview.
May I have your first name only

PHCHKand can I confirm that your phone number is %KEY%
(76) SP
Yes.....1
No.....2

That's the end of this survey
I would like to thank you for taking part.
My name is %INAME% and if you have any queries about this survey you can ring my supervisor Pania Brown on (09)-373-8711.
