



Versus
RESEARCH

Environment Southland Perceptions Survey

August 2018

Conducted by Versus Research

Summary of Findings

AWARENESS AND IMPRESSIONS OF ENVIRONMENT SOUTHLAND

Overall, 86% of residents and 92% of farmers are aware of Environment Southland at an unprompted level. Unprompted awareness amongst residents has increased significantly again this year (86% cf. 2017, 82%), while unprompted awareness amongst farmers remains on a par with last year's results. As with previous years, farmers are more likely to be aware of Environment Southland unprompted (92% cf. residents, 86%). Total awareness remains high, with almost all residents (98%) and farmers (100%) aware of Environment Southland at a prompted level.

On a par with last year's results, 49% of residents agree Environment Southland is a leader in the development of an environmentally friendly Southland. A further 45% agree Environment Southland enables prosperity in Southland and 44% agree it effectively manages pressing environmental issues.

When looking at results for farmers, 61% agree Environment Southland is a leader in the development of an environmentally friendly Southland. Just over half (51%) of farmers agree Environment Southland enables prosperity in Southland and 62% agree it effectively manages pressing environmental issues. This year's results for farmers are on a par with last year's results.

In terms of ratings of Environment Southland amongst residents, 49% perceive that Environment Southland informs them well about its management of Southland's natural resources; this is a significant increase from last year's result (49% cf. 2017, 43%). A further 42% perceive Environment Southland is doing well at protecting and managing the quality of water in Southland's rivers, lakes and streams, and around one third (36%) of residents rate their opportunity to participate in Environment Southland's decision-making processes positively.

Similar to last year's results, 63% of farmers perceive that Environment Southland is protecting and managing the quality of water in Southland's rivers, lakes, and streams 'well'. A further 59% perceive they are informed about the management of Southland's natural resources and 51% rate their opportunity to participate in decision making processes 'well'.

SOUTHLAND'S PRIORITIES

Water, water quality and water pollution is the biggest environmental issue facing Southland that was mentioned most by residents (61%) and farmers (59%). Notably, farmers are also more likely to mention urban pollution (4% cf. residents, 0%) and long-term sustainability (3% cf. residents, 1%) are issues facing Southland. Compared to last year's results, residents are less likely to mention water, water quality and water pollution as an issue in the region (61% cf. 2017, 67%) and more likely to mention rubbish, plastic, and recycling (13% cf. 2017, 6%), dairy farming and run off (12% cf. 2017, 7%), clean air and air pollution (6% cf. 2017, 3%), general pollution (4% cf. 2017, 2%), and 1080 (4% cf. 2017, 1%) as issues facing Southland's environment. This year farmers are also more likely to mention rubbish, plastic and recycling as issues facing Southland (11% cf. 2017, 5%).

When asked about Environment Southland's response to environmental issues, 30% of residents rate Environment Southland's response positively. Comparatively, 54% of farmers rate Environment Southland's response to these issues positively, significantly higher than the residents' results (54% cf. residents, 30%).

Twenty-one percent of residents think Environment Southland is doing a better job than last year. This is on a par with last year's results. Forty percent of farmers agree Environment Southland is doing a better job than last year, which is significantly higher than the residents' results (40% cf. residents, 21%).

Both residents (23%) and farmers (32%) mention that their rating for Environment Southland doing a better job than last year relates to good communication and Environment Southland being more active in the community. Farmers are more likely to mention that their positive ratings are based on collaboration and listening (5% cf. residents, 1%). Compared to last year's results, residents are more likely to mention that their reason for Environment Southland doing a better job than last year relates to Environment Southland generally improving (19% cf. 2017, 11%), being proactive (17% cf. 2017, 5%), its increased awareness of issues in the region (14% cf. 2017, 10%), and Environment Southland generally doing a good job (12% cf. 2017, 8%). This year, farmers are also more likely to mention that their rating is based on good communication (32%

Summary of Findings

cf. 2017, 21%), Environment Southland generally doing a good job (22% cf. 2017, 9%), generally improving (16% cf. 2017, 9%), and being proactive (11% cf. 2017, 1%).

Reasons for residents (39%) and farmers (34%) mentioning that Environment Southland is not doing a better job than last year relate to Environment Southland not making any changes or doing things different. Notably, farmers are less likely to mention that water quality is still an issue (3% cf. residents, 22%). Compared to last year's results, residents are more likely to mention that their rating for Environment Southland not doing a better job than last year because it isn't doing anything differently and has made no changes (39% cf. 2017, 25%) and that things aren't improving (8% cf. 2017, 3%). Compared to 2017, farmers are more likely to state that their reasons for mentioning Environment Southland is not doing a better job than last year relate to Environment Southland doing a poor job generally (14% cf. 2017, 4%) and because things aren't improving (14% cf. 2017, 0%).

COMMUNICATION

Residents mention their primary sources of information about Environment Southland are newspapers (59%), flyers (46%), *Envirosouth* (35%) and other people (36%). Compared to last year's results, use of the majority of information sources has increased significantly amongst residents. Residents are also less likely to mention they don't source any information about Environment Southland (1% cf. 2017, 6%).

Farmers mention their primary sources of information about Environment Southland are newspapers (42%) and flyers (31%). Farmers are also more likely to mention they source information through the internet (28% cf. residents, 15%), at meetings (9% cf. residents, 1%), on other social media (5% cf. residents, 1%) and at community groups (3% cf. residents, 1%). Amongst farmers, use of flyers (31% cf. 2017, 16%) and the internet (28% cf. 2017, 17%) to source information has increased significantly this year.

Perceptions of the information Environment Southland provides to the community remain similar to results from 2017. Seventy percent of residents agree the information from Environment Southland is valuable to the community, 64% agree the information is credible, and a further 64% agree that they trust the information from Environment Southland. Amongst

farmers, 76% agree the information is valuable, 72% agree the information is credible, and 69% agree that they trust the information from Environment Southland.

ENVIROWEEK

This year, 43% of residents recall seeing *Enviroweek*, 64% read *Enviroweek*, and 65% are aware it is produced by Environment Southland. Although not statistically significant, these results are a decrease from 2017's result. Eighty-three percent of residents agree that the information in *Enviroweek* is valuable to the community and a further 76% agree that the information is credible.

Just over half (55%) of farmers recall seeing *Enviroweek*. This is significantly higher than the residents' results (55% cf. residents, 43%). A further 71% of farmers have read *Enviroweek* and 82% are aware Environment Southland produces the publication. This is also significantly higher than the residents' results (82% cf. residents, 65%). Overall, 83% of farmers agree the information in *Enviroweek* is valuable to the community and 86% agree the information is credible. These results are on a par with results from 2017.

ENVIROSOUTH

Sixty-five percent of residents recall seeing *Envirosouth*, 75% have read *Envirosouth*, and 83% are aware *Envirosouth* is produced by Environment Southland. Recall of *Envirosouth* (65% cf. 2017, 73%) and awareness that Environment Southland produces the publication (83% cf. 2017, 87%) have decreased significantly this year amongst residents. When looking at perceptions of *Envirosouth*, 81% of residents agree that the information is valuable to the community. This is a significant increase from last year's result (81% cf. 2017, 76%). A further 77% of residents agree the information in *Envirosouth* is credible, similar to last year's result.

The majority (80%) of farmers recall seeing *Envirosouth*. This is significantly higher than the residents' results (80% cf. residents, 65%). A further 86% of farmers have read *Envirosouth*. This is significantly higher than the residents' results (86% cf. residents, 75%) and a significant increase from last year's results (86% cf. 2017, 78%). The majority (96%) of farmers are aware Environment Southland produces the publication. This is also significantly higher than the residents' results (96% cf. residents, 83%) and a significant increase from

Summary of Findings

last year's results (96% cf. 2017, 91%). Perceptions of *EnviroSouth* remain on a par with last year's results amongst farmers, with 83% agreeing the information is valuable and 85% agreeing the information is credible.

ENVIROFARM

Similar to last year's results, 28% of farmers recall seeing *Envirofarm*. A further 71% of farmers have read *Envirofarm* and 75% are aware it is produced by Environment Southland. Perceptions of *Envirofarm* have decreased this year, with significantly fewer farmers mentioning the information in *Envirofarm* is valuable (80% cf. 2017, 89%) and credible (78% cf. 2017, 86%).

LUNCHTIME FARMING SHOW

Just under half (43%) of farmers listen to the Lunchtime Farming Show; although not statistically significant this is a 7% decrease from 2017. A further 75% of farmers mention they have heard information from Environment Southland on the show. Ninety percent of farmers agree the information on the Lunchtime Farming Show is valuable and a further 91% agree the information is credible. This is a significant increase from 2017's results (91% cf. 2017, 79%).

NEWSPAPERS

Both residents (55%) and farmers (59%) mention they read *The Southland Times*. *Southland Express* (46%) and *Otago Daily Times* (17%) are also popular newspapers amongst residents. Farmers are more likely to mention they read *The Ensign* (31% cf. residents, 15%), *Advocate South* (26% cf. residents, 13%), *Southern Rural Life* (42% cf. residents, 8%), *Newslink* (23% cf. residents, 7%), and *Otago Southland Farmer* (37% cf. residents, 4%). Farmers are also less likely to mention they read *Southern Express* (32% cf. residents, 46%) and *Otago Daily Times* (10% cf. residents, 17%). Compared to last year's results, readership of most newspapers has decreased amongst both residents and farmers.

RADIO STATIONS

More FM (13%), The Edge (12%) and The Rock (11%) are the most popular radio stations amongst residents. This is on a par with last year's results. Hokonui Gold is the most popular radio station amongst farmers (39% cf. residents, 9%) which is

significantly higher than the results for residents. This year, significantly fewer farmers mention that they listen to The Rock (11% cf. 2017, 20%).

INTERNET AND SOCIAL MEDIA

Similar to last year's results, 84% of residents mention they go online regularly. A further 87% of residents indicate they have a Facebook profile. This is a significant increase from last year's results (cf. 2017, 83%). Just over a third of residents are aware Environment Southland has a Facebook page (38%) and 75% would use the Facebook page to source information. This is a significant increase from last year's results (cf. 2017, 69%). Use of the Environment Southland website has also increased significantly this year amongst residents (33% cf. 2017, 26%).

Amongst farmers, 77% mention they go online regularly, in line with previous years' results this is significantly lower than the results for residents (cf. residents, 84%). A further 84% of farmers have a Facebook profile and this is a significant increase from last year's results (84% cf. 2017, 74%). Just over half of farmers are aware Environment Southland has a Facebook page. This is significantly higher than the results for residents (53% cf. residents, 38%) and 71% mention they would use Environment Southland's Facebook page for information. Sixty-five percent of farmers also mention they use the Environment Southland website. This is significantly higher than the results for residents (65% cf. residents, 33%).

IMPROVEMENTS TO COMMUNICATION

Residents mention Environment Southland could improve their communication through using Facebook and social media more (14%). Compared to last year, residents are more likely to mention that Environment Southland should hold more public or community meetings (7% cf. 2017, 3%) and have more information online (7% cf. 2017, 3%).

Farmers are more likely to mention they are happy with how Environment Southland currently communicates (14% cf. residents, 6%) and that Environment Southland should engage more with farmers (14% cf. 2017, 1%). Compared to last year's results, farmers are more likely to mention that Environment Southland should hold more community or public meetings (10% cf. 2017, 3%) and use Facebook and social media more (7% cf. 2017, 2%).

Summary of Findings

CIVIL DEFENCE

Similar to last year's results, 61% of residents have a household emergency plan and 83% mention they would be self-sufficient for three days. A further 11% of residents heard Environment Southland's flood warnings. This is a significant decrease from last year's results (11% cf. 2017, 16%).

Amongst farmers, 64% mention they have a household emergency plan. This is a significant increase from last year's results (64% cf. 2017, 52%). Almost all (92%) farmers mention they would be self-sufficient for three days - significantly higher than the results for residents (92% cf. residents, 83%), and 14% of farmers heard Environment Southland's flood warnings. This is also a significant decrease from last year's results (14% cf. 2017, 22%).

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Background, Objectives and Method

Background, Objectives and Method

BACKGROUND AND OBJECTIVES

Environment Southland is responsible for the management of Southland's natural resources. Currently Environment Southland communicates information about its role and activities in the region to stakeholder groups and the wider community via several different methods including both print and targeted media.

To ensure the information is reaching the intended target audiences, Environment Southland monitors how well its communications are received by resident groups within the region. In 2018 Versus Research was again commissioned by Environment Southland to conduct a Perceptions Survey to assist with this monitoring.

The primary objectives of the survey are to determine:

- public perceptions of Environment Southland's environmental management;
- the effectiveness of Environment Southland's current communication channels;
- residents' perceptions of the environmental priorities in Southland, and how well Environment Southland has responded to these, and;
- public uptake and preference for different media channels.

METHOD

As with previous years, a mixed-method approach was used for data collection. This involved both computer-aided telephone interviewing (CATI) and online interviewing which was undertaken simultaneously. Online interviewing has again been included to ensure a representative sample of the population can be collected, as the decreased use of landline phones makes it difficult to reach certain groups within communities, namely younger residents.

A total of n=500 (n=350 residents and n=150 farmers) interviews were completed via CATI and a total of n=350 responses (n=300 residents and n=50 farmers) were collected online, giving a total sample size of n=650 residents and n=200 farmers. Both residents and farmers were canvassed online this year, however the primary target of this method was younger residents as they are increasingly difficult to reach via telephone. Environment Southland's consent database was also utilised this year to help reach dairy farmers in the area.

CATI and online data collection was undertaken between the 23 July and 13 August 2018. Telephone numbers for CATI were supplied by Equifax, while the online sample was sourced through social media. Those who responded online were screened to ensure they had not completed the survey over the phone.

The sample was stratified, as per previous years, to ensure that the sample composition was geographically representative of the region as a whole.

Background, Objectives and Method

MARGIN OF ERROR

Margin of error (MOE) is a statistic used to express the amount of random sampling error present in a survey's results. The MOE is particularly relevant when analysing a subset of the data as smaller sample sizes incur a greater MOE. The final resident sample size for this study is n=650, which gives a maximum margin of error of +/- 3.84% at the 95% confidence interval. That is, if the observed result for the total sample of n=650 respondents is 50% (point of maximum margin of error), then there is a 95% probability that the true answer falls between 46.16% and 53.84%. The margin of error associated with the farmer sample (n=200) is +/-6.98%.

WEIGHTING

Age and gender weightings have been applied to the residents' data set. Weighting ensures that specific demographic groups are neither under- nor over-represented in the final data set and that each group is represented as it would be in the population.

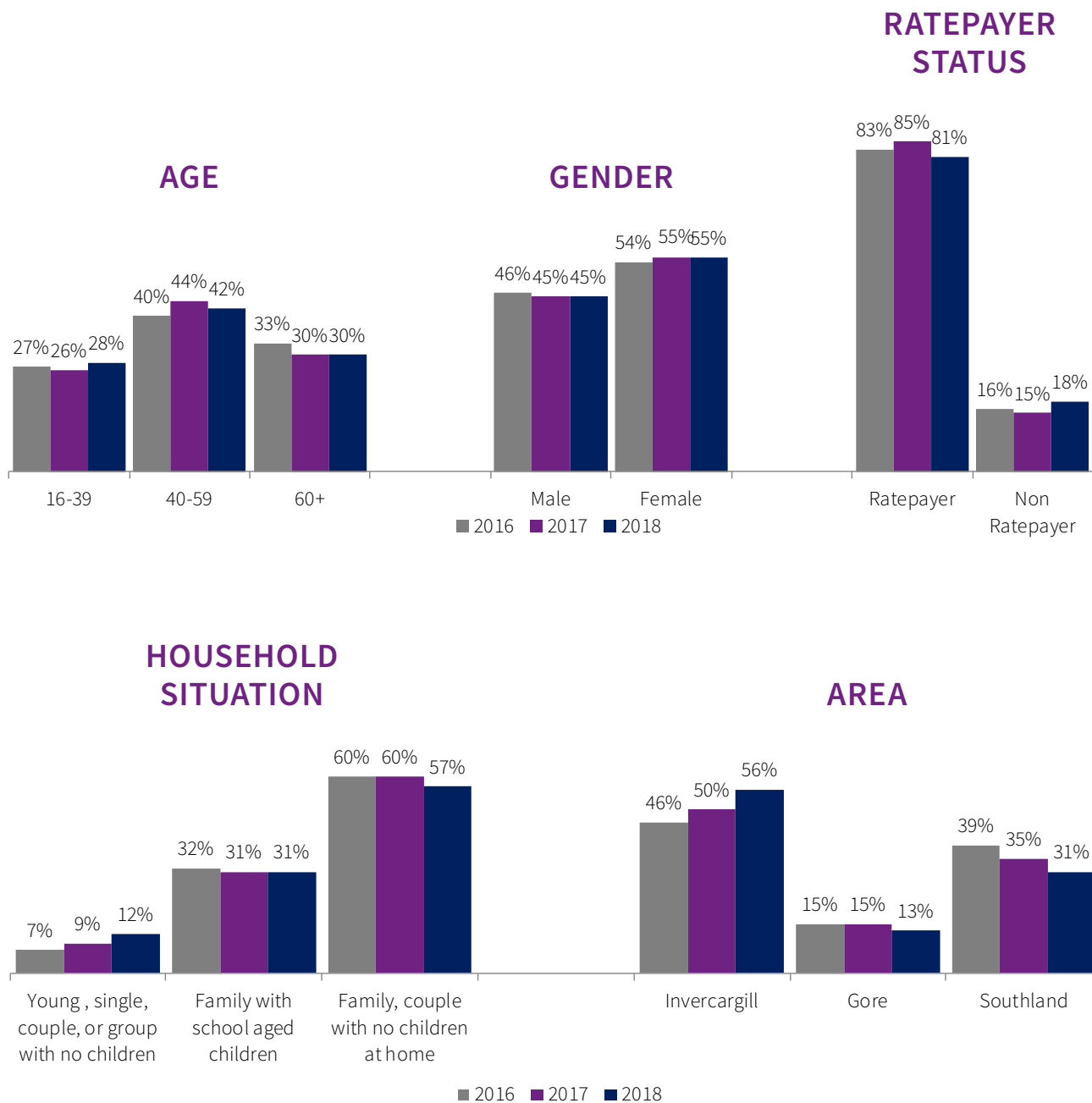
Weighting gives greater confidence that the final results are representative of the Southland region's population overall and are not skewed by a particular demographic group. The proportions used for the gender and age weights are taken from the 2013 Census (Statistics New Zealand). The proportions used are shown in the table below:

Age	Proportion Male	Proportion Female
16-39	18%	18%
40-59	18%	18%
60+	13%	15%
Total	49%	51%

Background, Objectives and Method

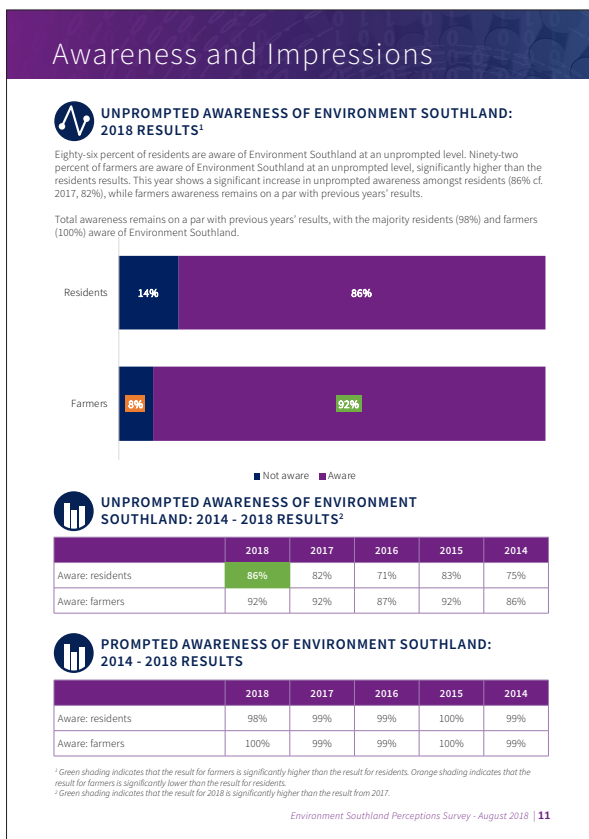
SAMPLE

The charts below show the unweighted residents' sample from 2016, 2017 and 2018.



How to Read these Findings

The results for residents and farmers have been analysed and reported separately within this report.



2018's total level results for residents and farmers are shown in the image at left. Significance testing has been applied to these results; this testing compares farmers' results to residents' results. Any significant changes are shown using shading; green shading indicates the farmers' results are significantly higher than the residents' results, while orange shading indicates that the farmers' results are significantly lower than the residents' results. cf. is an abbreviation for compare in Latin. It is used within the text of the report when the farmers' results are significantly different from the residents' results.

This year's results are also compared to previous years' results in table format. Significance testing has also been applied to these results. This testing compares 2017 and 2018 results. Any significant changes are shown using shading; green shading indicates that there has been a significant increase from 2017's results, while orange shading indicates a significant decrease from 2017's results.



At the end of each section, area and demographic differences are displayed. This page shows results which are significantly higher than the total results amongst residents.



Awareness and Impressions

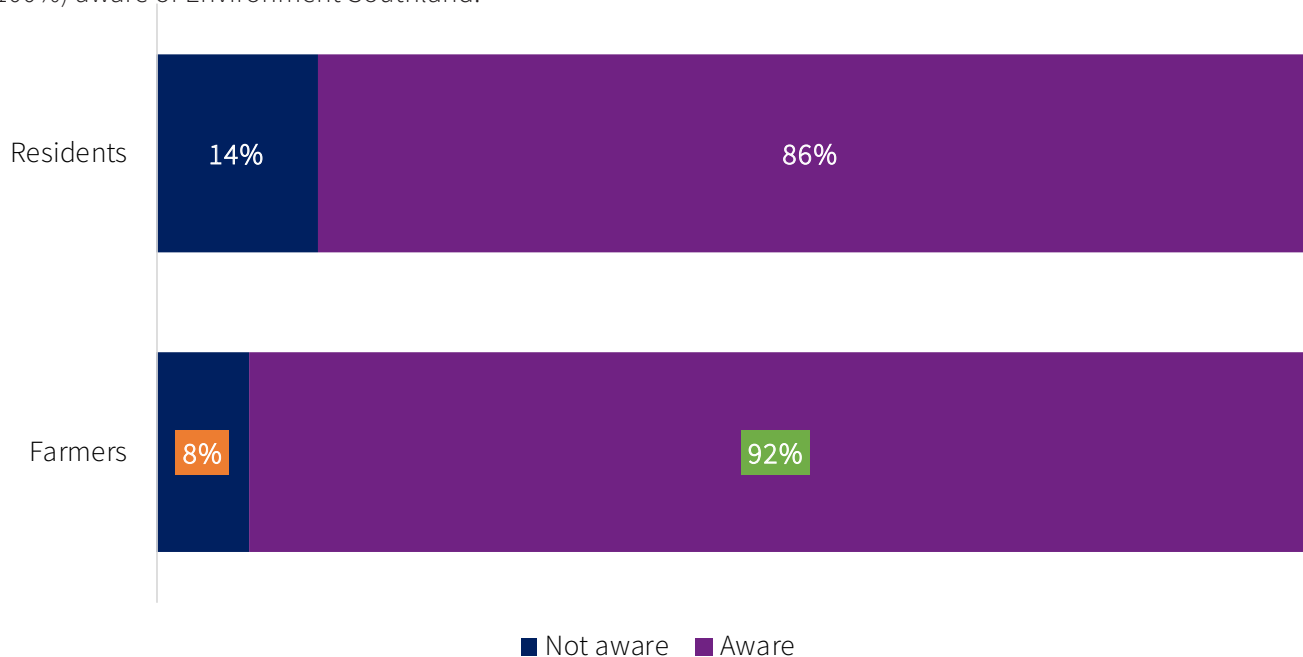
Awareness and Impressions



UNPROMPTED AWARENESS OF ENVIRONMENT SOUTHLAND: 2018 RESULTS¹

Eighty-six percent of residents are aware of Environment Southland at an unprompted level. Ninety-two percent of farmers are aware of Environment Southland at an unprompted level, significantly higher than the residents' results. This year shows a significant increase in unprompted awareness amongst residents (86% cf. 2017, 82%) while farmers' awareness remains on a par with last year.

Total awareness remains on a par with previous years' results, with the majority residents (98%) and farmers (100%) aware of Environment Southland.



UNPROMPTED AWARENESS OF ENVIRONMENT SOUTHLAND: 2014 - 2018 RESULTS²

	2018	2017	2016	2015	2014
Aware: residents	86%	82%	71%	83%	75%
Aware: farmers	92%	92%	87%	92%	86%



PROMPTED AWARENESS OF ENVIRONMENT SOUTHLAND: 2014 - 2018 RESULTS

	2018	2017	2016	2015	2014
Aware: residents	98%	99%	99%	100%	99%
Aware: farmers	100%	99%	99%	100%	99%

¹ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

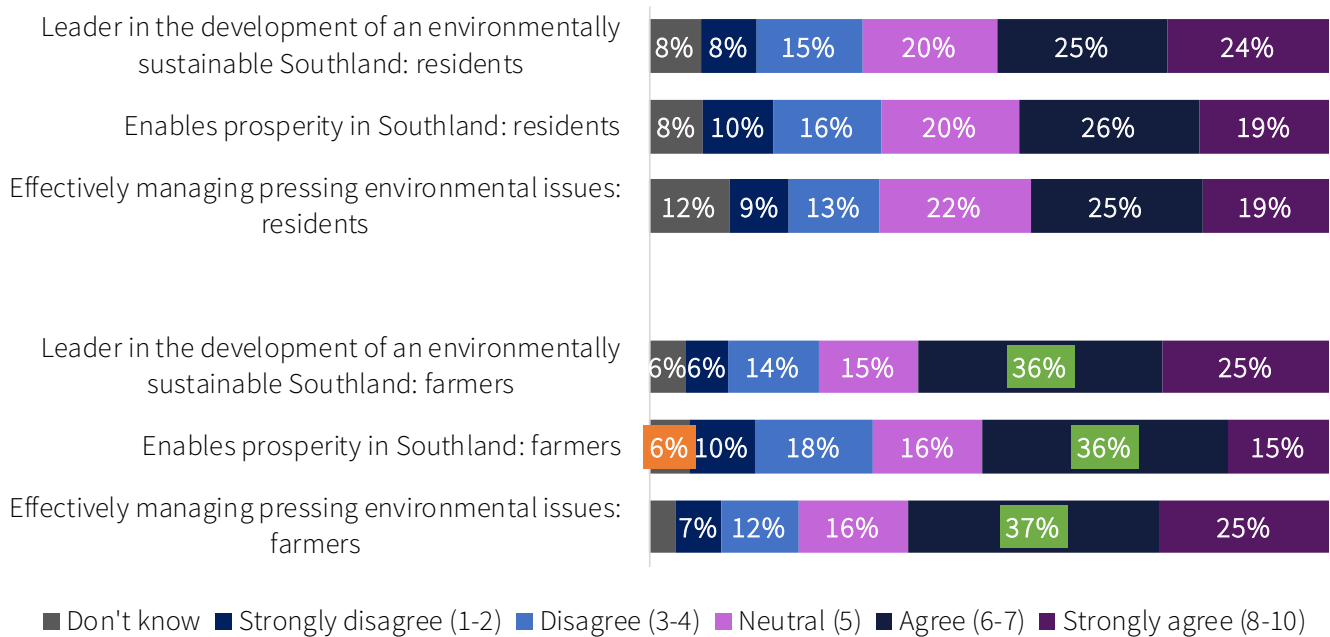
² Green shading indicates that the result for 2018 is significantly higher than the result from 2017.

Awareness and Impressions



IMPRESSIONS OF ENVIRONMENT SOUTHLAND: 2018 RESULTS³

Almost half (49%) of residents agree (25%) or strongly agree (24%) that Environment Southland is a leader in the development of an environmentally sustainable Southland; comparatively 61% of farmers agree (36%) or strongly agree (25%) with this. Notably farmers are more likely to agree that Environment Southland is a leader in the development of an environmentally sustainable Southland (36% cf. residents, 25%), enables prosperity (36% cf. residents, 26%), and effectively manages pressing environmental issues (37% cf. residents, 25%). This year's results are on a par with results from 2017, with no statistically significant changes noted.



IMPRESSIONS OF ENVIRONMENT SOUTHLAND: 2011-2018 RESULTS

	2018	2017	2016	2015	2014
Leader in the development of an environmentally friendly Southland: residents	49%	50%	52%	62%	59%
Enables prosperity in Southland: residents	45%	42%	45%	50%	42%
Effectively managing pressing environmental issues: residents	44%	44%	50%	60%	56%
Leader in the development of an environmentally friendly Southland: farmers	61%	64%	49%	59%	54%
Enables prosperity in Southland: farmers	51%	47%	35%	40%	34%
Effectively managing pressing environmental issues: farmers	62%	60%	43%	60%	65%

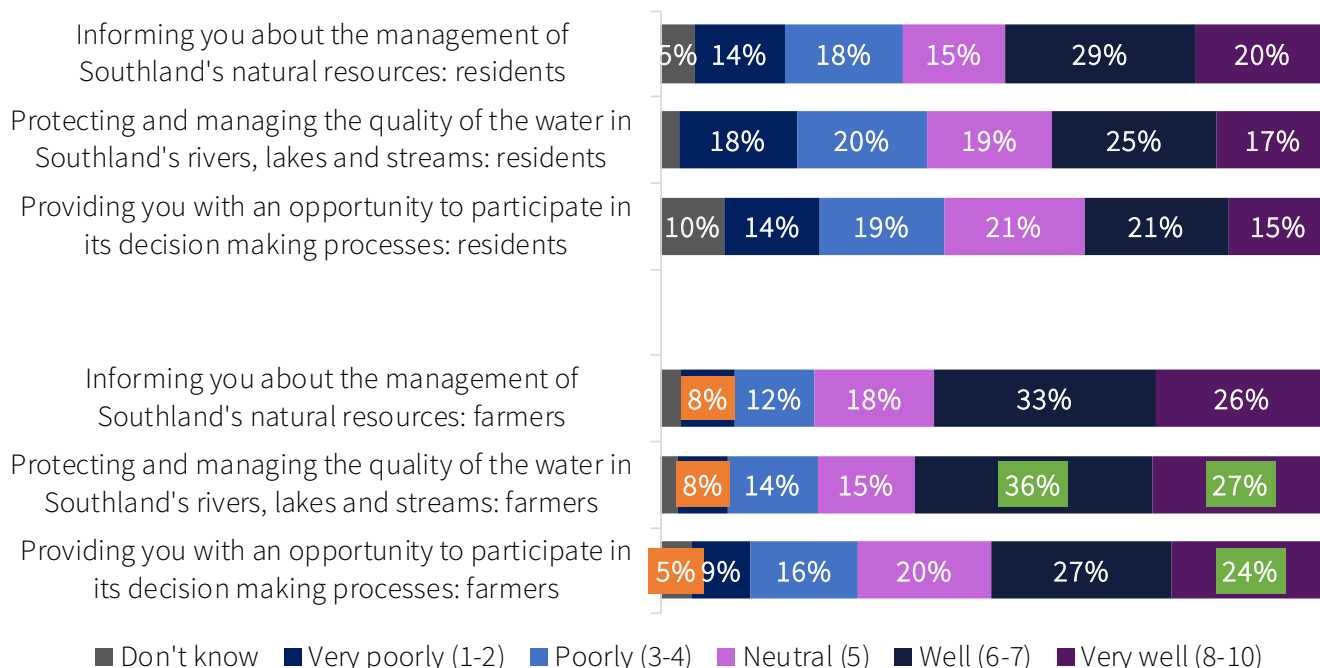
³ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

Awareness and Impressions



RATINGS OF ENVIRONMENT SOUTHLAND: 2018 RESULTS⁴

Forty-nine percent of residents think Environment Southland is doing well (29%) or very well (20%) at informing them about the management of natural resources; comparatively 59% of farmers rate this positively. Notably, farmers are more likely to give positive ratings for Environment Southland protecting and managing the quality of water (27%) and rate their opportunity to participate (24%) as 'very well'. Compared to last year's results, positive ratings amongst residents for Environment Southland informing them about the management of natural resources (49% cf. 2017, 43%) have increased significantly.



RATINGS OF ENVIRONMENT SOUTHLAND: 2014 - 2018 RESULTS⁵

	2018	2017	2016	2015	2014
Informing you about the management of Southland's natural resources: residents	49%	43%	48%	57%	54%
Protecting and managing the quality of water in Southland's rivers, lakes, and streams: residents	42%	41%	44%	56%	46%
Providing you with an opportunity to participate in its decision-making process: residents	36%	34%	36%	41%	38%
Informing you about the management of Southland's natural resources: farmers	59%	59%	61%	59%	56%
Protecting and managing the quality of water in Southland's rivers, lakes, and streams: farmers	63%	62%	46%	67%	64%
Providing you with an opportunity to participate in its decision-making process: farmers	51%	55%	48%	48%	37%

⁴ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

⁵ Green shading indicates that the result for 2018 is significantly higher than the result from 2017.

Awareness and Impressions

Summary of Findings

Detailed below are area, age and gender differences which are significantly higher than the total result.



AREA DIFFERENCES

INVERCARGILL

Strongly agree (8-10) Environment Southland is a leader in the development of an environmentally friendly Southland (29%), enables prosperity in Southland (24%), and effectively manages pressing environmental issues (22%).

Doing very well (8-10) at informing residents about the management of Southland's natural resources (23%) and protecting and managing the quality of water in Southland's rivers, lakes and streams (20%).

GORE

Agree (6-7) Environment Southland is a leader in the development of an environmentally friendly Southland (40%), enables prosperity in Southland (37%), and effectively manages pressing environmental issues (39%).

SOUTHLAND

Don't know if Environment Southland is a leader in the development of an environmentally friendly Southland (14%), enables prosperity in Southland (18%) and effectively manages pressing environmental issues (13%).
Don't know if Environment Southland is informing residents about the management of Southland's natural resources (11%) or providing residents with an opportunity to participate in decision making processes (16%).



DEMOGRAPHIC DIFFERENCES

AGE



Not aware of Environment Southland unprompted (21%).
Doing well (6-7) at informing residents about the management of Southland's natural resources (34%).



Strongly agree (8-10) Environment Southland enables prosperity in Southland (24%). Neutral rating (5) that Environment Southland effectively manages pressing environmental issues (27%).
Doing very well (8-10) at informing residents about the management of Southland's natural resources (32%) and providing residents with an opportunity to participate in decision making processes (22%).



Aware of Environment Southland unprompted (91%).
Disagree (3-4) Environment Southland is a leader in the development of an environmentally friendly Southland (24%), enables prosperity in Southland (18%), and effectively manages pressing environmental issues (23%).
Doing poorly (3-4) at informing residents about the management of Southland's natural resources (25%), at protecting and managing the quality of water in Southland's rivers, lakes and streams (25%), and in providing residents with the opportunity to participate in decision making processes (26%).

Awareness and Impressions

Summary of Findings



DEMOGRAPHIC DIFFERENCES

GENDER



Strongly disagree (1-2) Environment Southland is a leader in the development of an environmentally friendly Southland (11%), enables prosperity in Southland (12%), and effectively manages pressing environmental issues (13%).
Doing very poorly (1-2) at informing residents about the management of Southland's natural resources (17%) and in providing residents with an opportunity to participate in decision making processes (19%).



No statistically significant differences noted.



Southland's Priorities

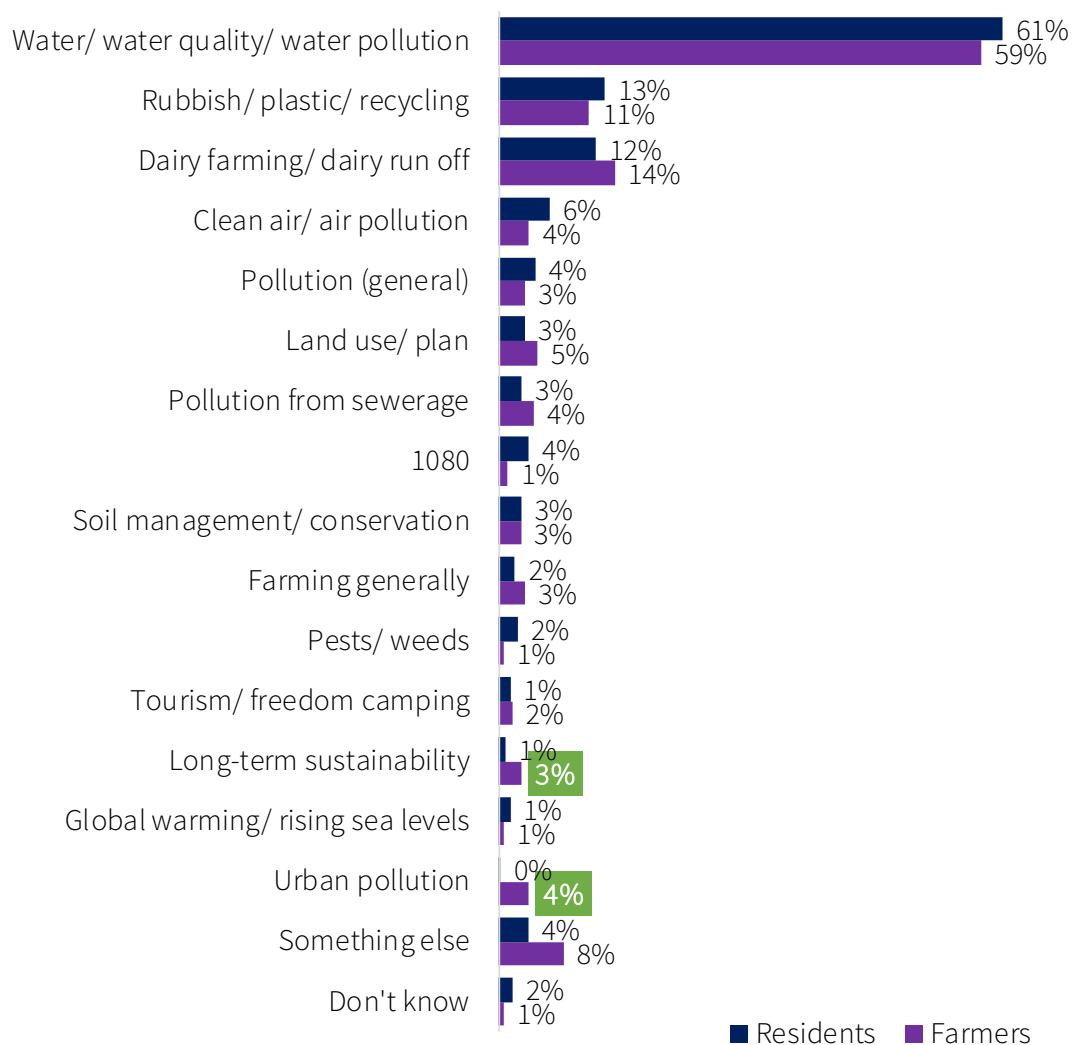
Southland's Priorities



SOUTHLAND'S PRIORITIES: 2018 RESULTS⁶

The majority of residents (88%) and farmers (95%) mention an issue facing Southland. This year the number of residents mentioning an issue has decreased significantly (88% cf. 2017, 94%) while farmers mentioning an issue has increased significantly (95% cf. 2017, 89%).

Water, water quality and water pollution is the issue mentioned most by residents (61%) and farmers (59%). At a lower level, rubbish, plastic and recycling (residents: 13%, farmers: 11%), and dairy farming and run off (residents: 12%, farmers: 14%) are also mentioned as issues facing Southland's environment. Notably, farmers are more likely to mention long-term sustainability (3% cf. residents, 1%) and urban pollution (4% cf. residents, 0%) as issues facing Southland.



⁶ Green shading indicates that the result for farmers is significantly higher than the result for residents.

Southland's Priorities



SOUTHLAND'S PRIORITIES: 2017- 2018 RESULTS⁷

Compared to last year's results, significantly fewer residents mention water, water quality and water pollution is an issue (61% cf. 2017, 67%). This year residents are more likely to mention rubbish, plastic and recycling (13% cf. 2017, 6%), dairy farming and run off (12% cf. 2017, 7%), clean air and air pollution (6% cf. 2017, 3%), general pollution (4% cf. 2017, 2%), and 1080 (4% cf. 2017, 1%) as issues facing Southland.

Farmers' results remain similar to results from last year, however the number of farmers mentioning rubbish, plastic and recycling as an issue facing Southland have increased significantly this year (11% cf. 2017, 5%).

	2018	2017
Water/ water quality/ water pollution: residents	61%	67%
Rubbish/ plastic/ recycling: residents	13%	6%
Dairy farming/ dairy run off: residents	12%	7%
Clean air/ air pollution: residents	6%	3%
Pollution (general): residents	4%	2%
1080: residents	4%	1%
Farming generally: residents	2%	3%
Pests/ weeds: residents	2%	1%
Global warming/ rising sea levels: residents	1%	1%
Something else: residents	4%	7%
Don't know: residents	2%	1%
Water/ water quality/ water pollution: farmers		
Water/ water quality/ water pollution: farmers	59%	67%
Dairy farming/ dairy run off: farmers	14%	14%
Rubbish/ plastic/ recycling: farmers	11%	5%
Clean air/ air pollution: farmers	4%	9%
Farming generally: farmers	3%	3%
Pollution (general): farmers	3%	4%
Global warming/ rising sea levels: farmers	1%	3%
Pests/ weeds: farmers	1%	3%
1080: farmers	1%	2%
Something else: farmers	8%	2%
Don't know: farmers	1%	1%

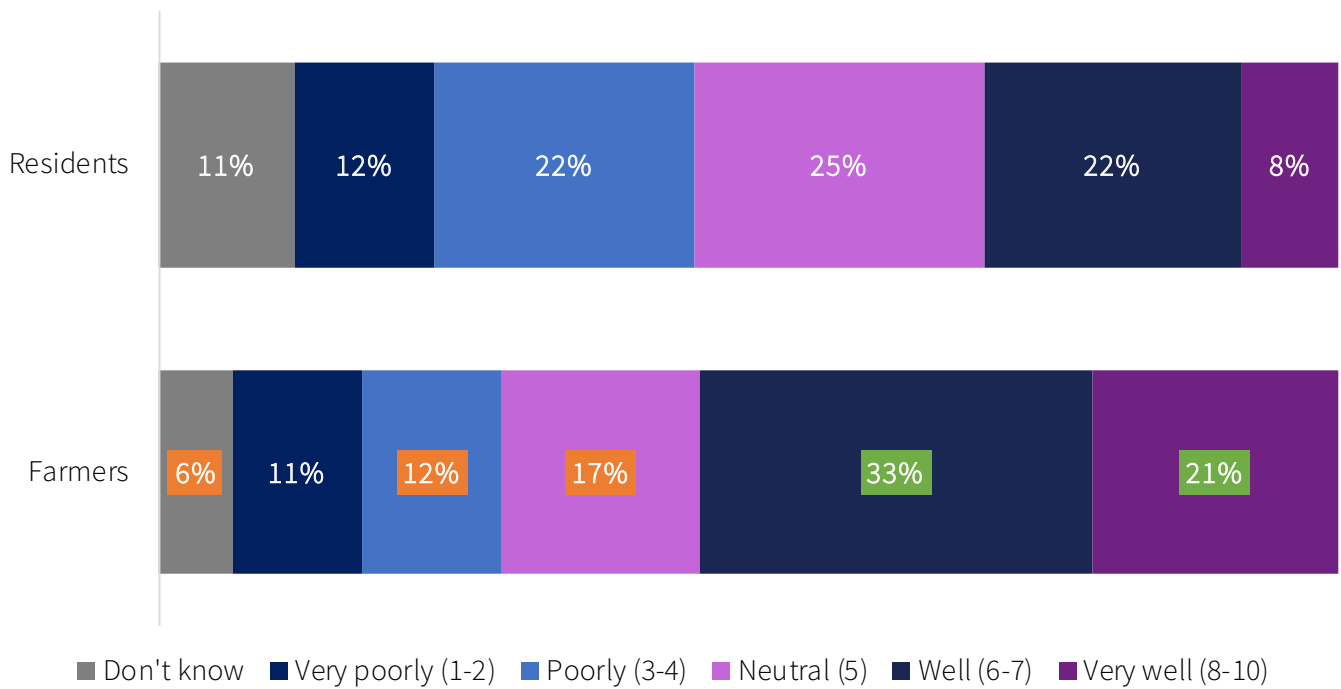
⁷ Green shading indicates that the result for 2018 is significantly higher than the result from 2017. Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.

Southland's Priorities



RESPONSE TO PRIORITIES: 2018 RESULTS⁸

Around a third (30%) of residents think Environment Southland is responding to these issues 'well' (22%) or 'very well' (8%). Over half (54%) of farmers mention that Environment Southland is responding 'well' (33%) or 'very well' (21%) to the important issues facing Southland; positive farmers' results are significantly higher than positive residents' results. Farmers are also less likely to mention that they don't know how well Environment Southland is responding to these issues (6% cf. residents, 11%).



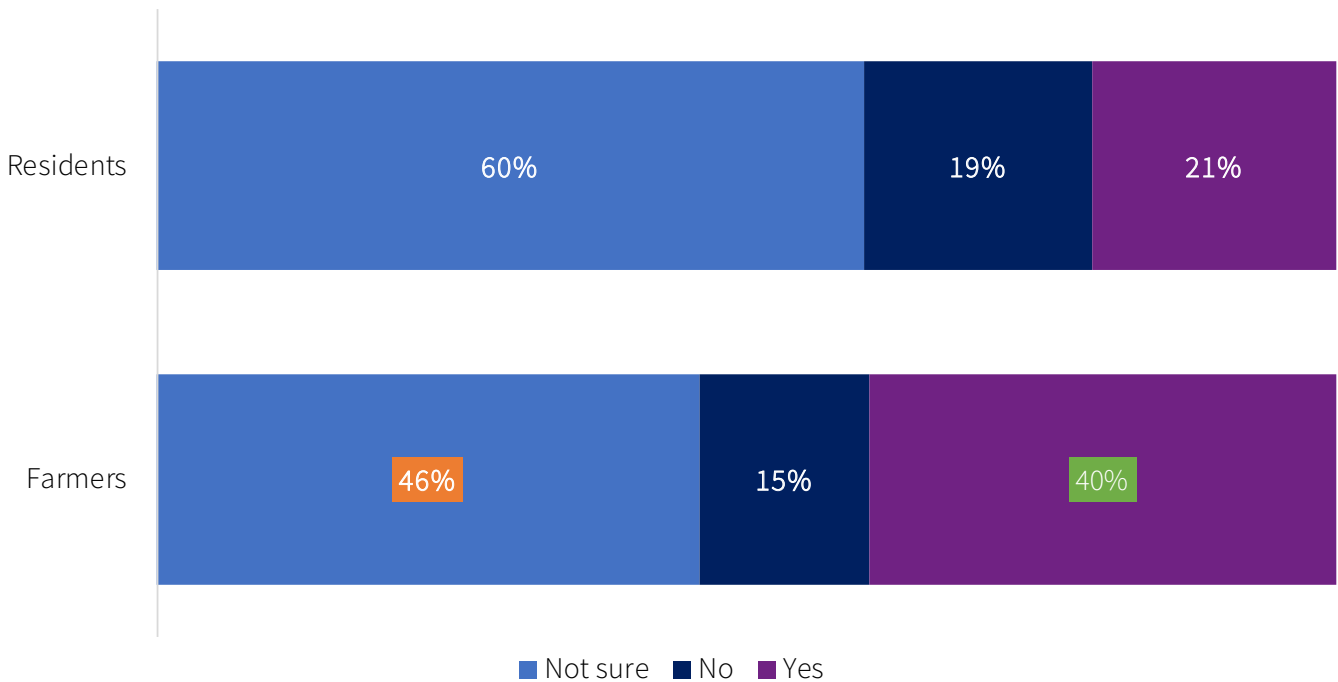
⁸ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

Southland's Priorities



ENVIRONMENT SOUTHLAND DOING A BETTER JOB THAN LAST YEAR: 2018 RESULTS⁸

Just under one quarter (21%) of residents think Environment Southland is doing a better job than last year. A further 19% think Environment Southland is not doing a better job than last year and 60% of residents are unsure. Amongst farmers, 40% think Environment Southland is doing a better job than last year. This is significantly higher than the residents' results. Farmers are also less likely than residents to mention they are not sure if Environment Southland is doing a better job than last year. This year's results are on a par with last year's results.



ENVIRONMENT SOUTHLAND DOING A BETTER JOB THAN LAST YEAR: 2017 - 2018 RESULTS

	2018	2017
Better than last year: residents	21%	21%
Better than last year: farmers	40%	38%

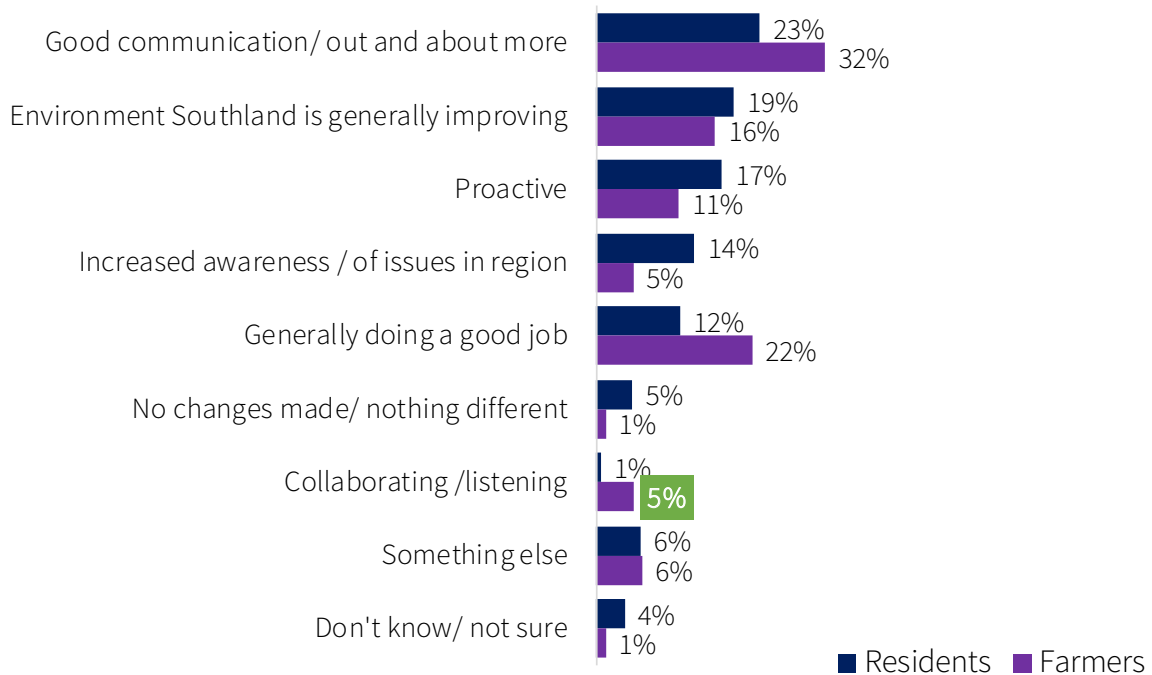
⁸ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

Southland's Priorities



REASONS FOR 'BETTER' JOB RATING 2018 RESULTS⁹

Primary reasons for stating that Environment Southland is doing a better job than last year relate to good communication (residents: 23%, farmers: 32%), Environment Southland generally improving (residents: 19%, farmers: 16%), and Environment Southland being proactive (residents: 17%, farmers: 11%). Notably, farmers are more likely than residents to mention that Environment Southland is collaborating and listening (5% cf. residents, 1%).



⁹ Green shading indicates that the result for farmers is significantly higher than the result for residents.

Southland's Priorities



REASONS FOR 'BETTER' JOB RATING: 2017 - 2018 RESULTS¹⁰

Compared to last year's results residents are more likely to mention that their positive ratings relate to Environment Southland generally improving (19% cf. 2017, 11%), being proactive (17% cf. 2017, 5%), increasing awareness (14% cf. 2017, 10%), and generally doing a better job (12% cf. 2017, 8%). Also of note, residents are less likely to mention that they don't have a reason for their rating (4% cf. 2017, 11%).

This year, farmers are also more likely to mention that their positive rating is based on good communication (32% cf. 2017, 21%), generally doing a good job (22% cf. 2017, 9%), generally improving (16% cf. 2017, 9%), and being proactive (11% cf. 2017, 1%). Farmers are also less likely to mention Environment Southland is collaborating and listening than last year (5% cf. 2017, 16%).

	2018	2017
Good communication/ out and about more: residents	23%	20%
Environment Southland is generally improving: residents	19%	11%
Proactive: residents	17%	5%
Increased awareness/ of issues in region: residents	14%	10%
Generally doing a good job: residents	12%	8%
No changes made/ nothing different: residents	5%	3%
Collaborating /listening: residents	1%	1%
Don't know/ not sure: residents	4%	11%
Good communication/ out and about more: farmers	32%	21%
Generally doing a good job: farmers	22%	9%
Environment Southland is generally improving: farmers	16%	9%
Proactive: farmers	11%	1%
Collaborating /listening: farmers	5%	16%
Increased awareness/ of issues in region: farmers	5%	4%
No changes made/ nothing different: farmers	1%	4%
Don't know/ not sure: farmers	1%	3%

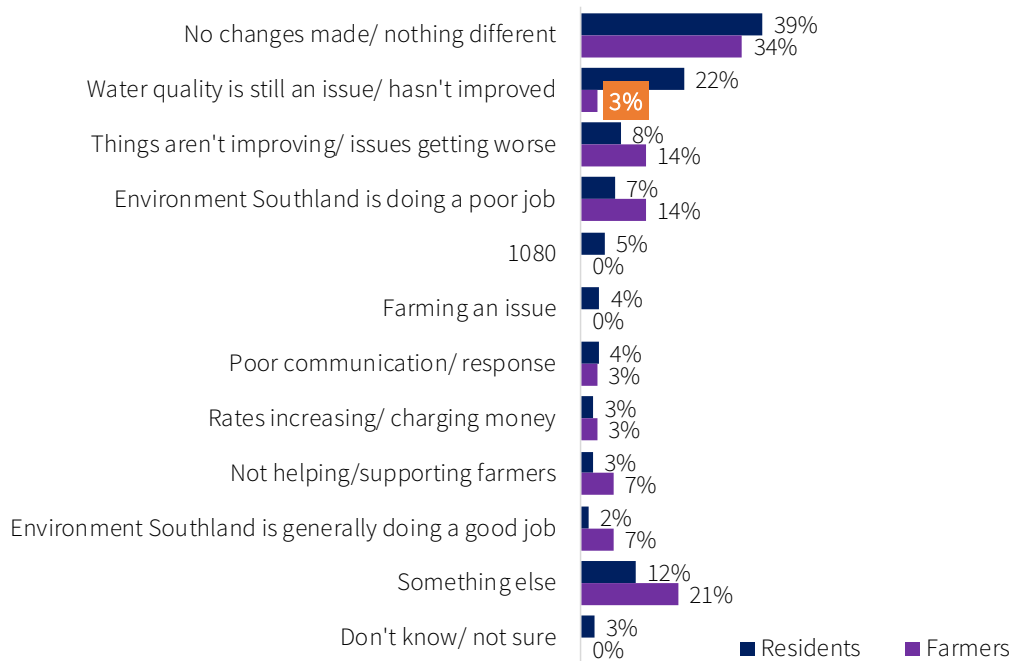
¹⁰ Green shading indicates that the result for 2018 is significantly higher than the result from 2017. Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.

Southland's Priorities



REASONS FOR 'NOT BETTER' JOB RATING¹¹

Primary reasons for residents mentioning that Environment Southland is not doing a better job than last year relate to no changes being made (39%) and water quality still being an issue (22%). Farmers mention that their reasons for this rating relate to Environment Southland not making any changes (34%), issues are getting worse (14%), and Environment Southland generally doing a poor job (14%). Notably, farmers are less likely than residents to mention that water quality is still an issue (3% cf. residents, 22%).



¹¹ Orange shading indicates that the result for farmers is significantly lower than the result for residents.

Southland's Priorities



REASONS FOR 'NOT BETTER' JOB RATING: 2017 - 2018 RESULTS¹²

Compared to last year, residents are more likely to mention that their negative rating is based on no changes being made (39% cf. 2017, 25%) and that things are not improving (8% cf. 2017, 3%). Also of note, this year residents are less likely to mention that water quality is still an issue (22% cf. 2017, 30%) and that Environment Southland is doing a poor job (7% cf. 2017, 12%).

Farmers are more likely to mention that Environment Southland is doing a poor job (14% cf. 2017, 4%) and that things aren't improving (14% cf. 2017, 0%). However they are less likely to mention that Environment Southland is not supporting or helping farmers (7% cf. 2017, 16%) and that water quality is still an issue (3% cf. 2017, 20%).

	2018	2017
No changes made/ nothing different: residents	39%	25%
Water quality is still an issue/ hasn't improved: residents	22%	30%
Things aren't improving/ issues getting worse: residents	8%	3%
Environment Southland is doing a poor job: residents	7%	12%
Poor communication/ response: residents	4%	6%
Farming an issue: residents	4%	4%
Not helping/supporting farmers: residents	3%	4%
Rates increasing/ charging money: residents	3%	3%
Collaborating /listening: residents	-	2%
Resident Summary		
No changes made/ nothing different: farmers	34%	40%
Environment Southland is doing a poor job: farmers	14%	4%
Things aren't improving/ issues getting worse: farmers	14%	0%
Not helping/supporting farmers: farmers	7%	16%
Poor communication/ response: farmers	4%	4%
Water quality is still an issue/ hasn't improved: farmers	3%	20%
Rates increasing/ charging money: farmers	3%	2%

¹² Green shading indicates that the result for 2018 is significantly higher than the result from 2017. Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.

Southland's Priorities |

Summary of Findings

Detailed below are area, age and gender differences which are significantly higher than the total result.



AREA DIFFERENCES

INVERCARGILL

Mention rubbish, plastic and recycling (15%), clear air and air pollution (8%), general pollution (6%), and sewerage pollution (4%) as the most important issues facing Southland.

Rate Environment Southland's response to issues poorly (3-4) (26%).

Not sure if Environment Southland is doing a better job than last year (64%).

GORE

Mention 1080 as the most important issue facing Southland (10%).

SOUTHLAND

Mention tourism and freedom camping as the most important issue facing Southland (3%). Rate Environment Southland's response to issues very poorly (1-2) (17%) or well (6-7) (27%).



DEMOGRAPHIC DIFFERENCES

AGE



Mention rubbish, plastic and recycling as the most important issue facing Southland (17%).



No statistically significant differences noted.



Mention Environment Southland is doing a better job than last year (26%).

GENDER



Mention Environment Southland is not doing a better job than last year (25%).



Mention rubbish, plastic and recycling is the most important issue facing Southland (17%). Are not sure if Environment Southland is doing a better job than last year (64%).

Communication

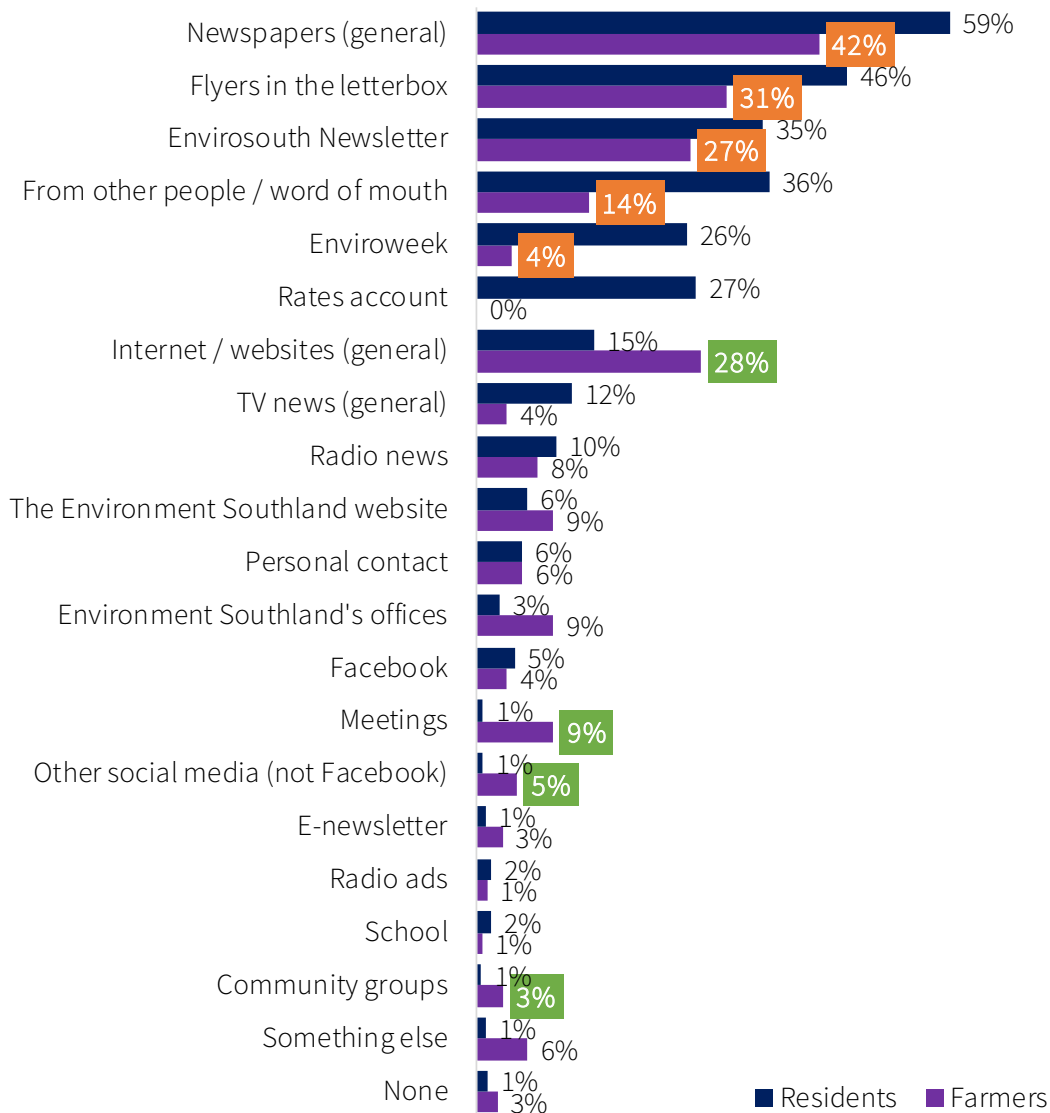


Communication



INFORMATION ABOUT ENVIRONMENT SOUTHLAND: 2018 RESULTS¹³

Primary sources of information about Environment Southland are newspapers (residents: 59%, farmers: 42%), flyers in the letterbox (residents: 46%, farmers: 31%), and *Envirosouth* (residents: 35%, farmers: 27%). Interestingly, farmers are less likely to gather information about Environment Southland through newspapers (42% cf. residents, 59%), flyers (31% cf. residents, 46%), *Envirosouth* (27% cf. residents, 35%), from other people (14% cf. residents, 36%), and in *Enviroweek* (4% cf. residents, 26%). Farmers are however, more likely to gather information about Environment Southland on the internet (28% cf. residents, 15%), at meetings (9% cf. residents, 1%), on social media (5% cf. residents, 1%), and at community groups (3% cf. residents, 1%).



¹³ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

Communication



INFORMATION ABOUT ENVIRONMENT SOUTHLAND: 2014 - 2018 RESULTS RESIDENTS¹⁴

Compared to last year's results, significant increases can be seen in residents mentioning that they gather information about Environment Southland through newspapers (59% cf. 2017, 53%), flyers (46% cf. 2017, 16%), from other people (36% cf. 2017, 6%), in *Envirosouth* (35% cf. 2017, 27%), on their rates accounts (27% cf. 2017, 4%), in *Enviroweek* (26% cf. 2017, 4%), on the TV news (12% cf. 2017, 6%), on the radio news (10% cf. 2017, 3%), and at Environment Southland offices (3% cf. 2017, 1%). Also of note, there has been a significant decrease in residents mentioning they have used other social media to source information (1% cf. 2017, 5%) and that they have not seen any information about Environment Southland (1% cf. 2017, 6%).

	2018	2017	2016	2015	2014
Newspapers	59%	53%	43%	58%	61%
Flyers in letterbox	46%	16%	29%	24%	29%
From other people	36%	6%	11%	6%	6%
Envirosouth newsletter	35%	27%	27%	33%	18%
Rates account	27%	4%	14%	10%	6%
Enviroweek column	26%	4%	12%	4%	3%
Internet/websites	15%	13%	12%	6%	11%
TV news	12%	6%	6%	2%	5%
Radio news	10%	3%	7%	4%	4%
Environment Southland offices	3%	1%	3%	7%	4%
Environment Southland website	6%	5%	6%	7%	3%
Personal contact	6%	4%	4%	7%	5%
Facebook	5%	6%	6%	1%	-
Other social media	1%	5%	3%	1%	-
Something else	1%	5%	6%	3%	5%
None	1%	6%	5%	2%	2%

¹⁴ Green shading indicates that the result for 2018 is significantly higher than the result from 2017. Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.

Communication



INFORMATION ABOUT ENVIRONMENT SOUTHLAND: 2014 - 2018 RESULTS FARMERS¹⁵

This year farmers are more likely to mention that they have gathered information about Environment Southland through flyers (31% cf. 2017, 16%) and on the internet (28% cf. 2017, 17%). Significantly fewer farmers this year mention that they have gathered information through personal contact (6% cf. 2017, 12%).

	2018	2017	2016	2015	2014
Newspapers	42%	45%	42%	56%	48%
Flyers in letterbox	31%	16%	30%	26%	25%
Internet/websites	28%	17%	13%	6%	7%
Envirosouth newsletter	27%	32%	26%	44%	24%
From other people	14%	18%	13%	7%	7%
Environment Southland website	9%	13%	8%	8%	8%
Environment Southland offices	9%	4%	7%	14%	7%
Radio news	8%	5%	9%	8%	6%
Personal contact	6%	12%	12%	6%	9%
Other social media	5%	2%	1%	-	-
Enviroweek column	4%	7%	7%	6%	4%
Facebook	4%	4%	3%	-	-
TV news	4%	3%	2%	3%	3%
Something else	6%	2%	9%	4%	4%
None	3%	2%	3%	4%	3%

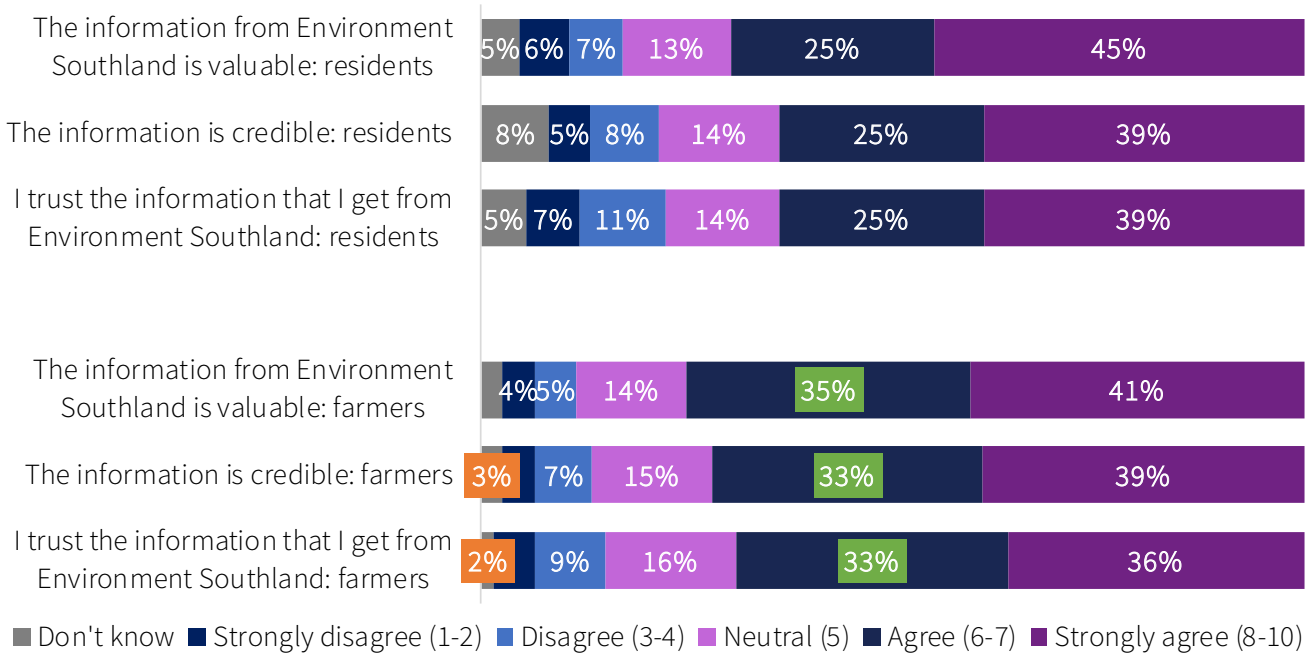
¹⁵ Green shading indicates that the result for 2018 is significantly higher than the result from 2017. Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.

Communication



INFORMATION ENVIRONMENT SOUTHLAND PROVIDES THE COMMUNITY: 2018 RESULTS¹⁶

Seventy percent of residents agree (25%) or strongly agree (45%) that the information Environment Southland provides is valuable; comparatively 76% of farmers rate this positively. Notably, farmers are more likely than residents to mention that they agree with these statements. Farmers are less likely to mention that they didn't know if the information is credible (3% cf. residents, 8%) and that they trust the information from Environment Southland (2% cf. residents, 5%). This year's results are on a par with results from previous years, with no statistically significant differences noted.



INFORMATION ENVIRONMENT SOUTHLAND PROVIDES THE COMMUNITY: 2014 - 2018 RESULTS

	2018	2017	2016	2015	2014
The information from Environment Southland is valuable: residents	70%	67%	66%	78%	76%
The information is credible: residents	64%	64%	60%	73%	70%
Trust the information from Environment Southland: residents	64%	64%	61%	71%	68%
The information Environment Southland valuable: farmers	76%	75%	66%	74%	76%
The information is credible: farmers	72%	70%	63%	68%	66%
Trust the information from Environment Southland: farmers	69%	73%	57%	63%	65%

¹⁶ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

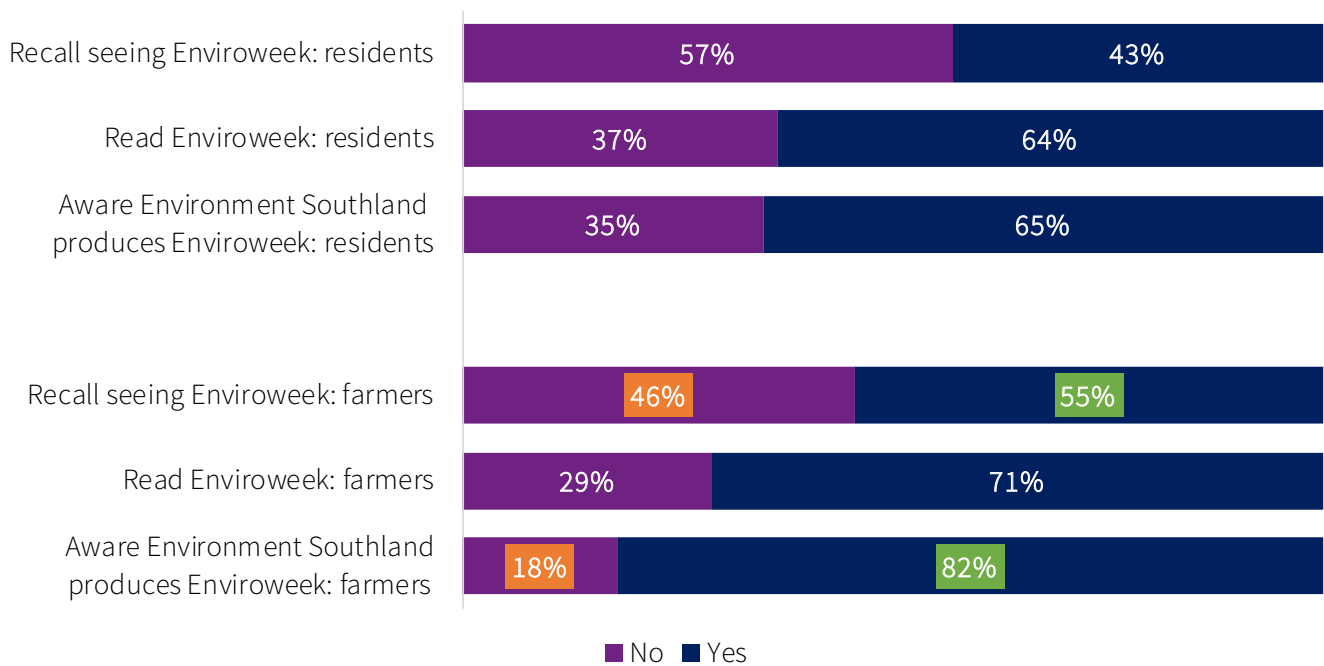
Communication



ENVIROWEEK AWARENESS AND USAGE: 2018 RESULTS¹⁷

Just under half (43%) of residents recalling seeing *Enviroweek*. A further 64% of residents have read *Enviroweek* and 65% are aware it is produced by Environment Southland. Although not statistically significant, recall, readership and awareness that Environment Southland produces *Enviroweek* have all decreased this year.

Amongst farmers, 55% recall seeing *Enviroweek*. This is significantly higher than the result for residents. A further 71% of farmers have read *Enviroweek* and 82% are aware Environment Southland produces the publication. This result is also significantly higher than the result for residents. This year's results for farmers are on a par with previous years' results.



ENVIROWEEK AWARENESS AND USAGE: 2014 - 2018 RESULTS

	2018	2017	2016	2015	2014
Recall seeing <i>Enviroweek</i> : residents	43%	48%	48%	52%	59%
Read <i>Enviroweek</i> : residents	64%	69%	64%	73%	72%
Aware Environment Southland produces <i>Enviroweek</i> : residents	65%	70%	67%	64%	63%
Recall seeing <i>Enviroweek</i> : farmers	55%	57%	55%	55%	55%
Read <i>Enviroweek</i> : farmers	71%	67%	71%	73%	63%
Aware Environment Southland produces <i>Enviroweek</i> : farmers	82%	82%	76%	77%	76%

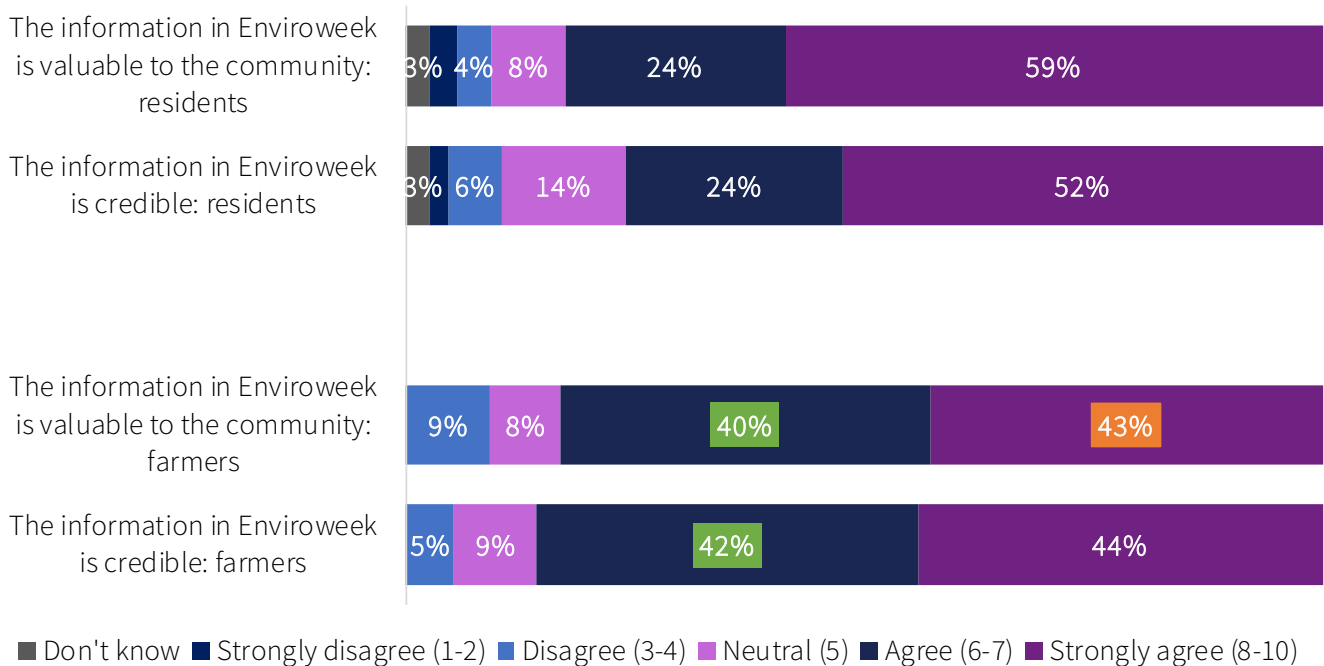
¹⁷ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

Communication



ENVIROWEEK PERCEPTIONS: 2018 RESULTS¹⁸

Eighty-three percent of residents agree (24%) or strongly agree (59%) that the information in *Enviroweek* is valuable to the community; 83% of farmers agree (40% cf. residents, 24%) or strongly agree (43% cf. residents, 59%) with this. A further 76% of residents agree (24%) or strongly agree (52%) that the information in *Enviroweek* is credible; 86% of farmers agree (42% cf. residents, 24%) or strongly agree (44%) with this. This year's results are on a par with previous years' results.



ENVIROWEEK PERCEPTIONS: 2014 - 2018 RESULTS

	2018	2017	2016	2015	2014
The information in <i>Enviroweek</i> is valuable to the community: residents	83%	82%	76%	84%	79%
The information in <i>Enviroweek</i> is credible: residents	76%	73%	67%	79%	73%
The information in <i>Enviroweek</i> is valuable to the community: farmers	83%	79%	76%	77%	79%
The information in <i>Enviroweek</i> is credible: farmers	86%	82%	65%	78%	75%

¹⁸ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

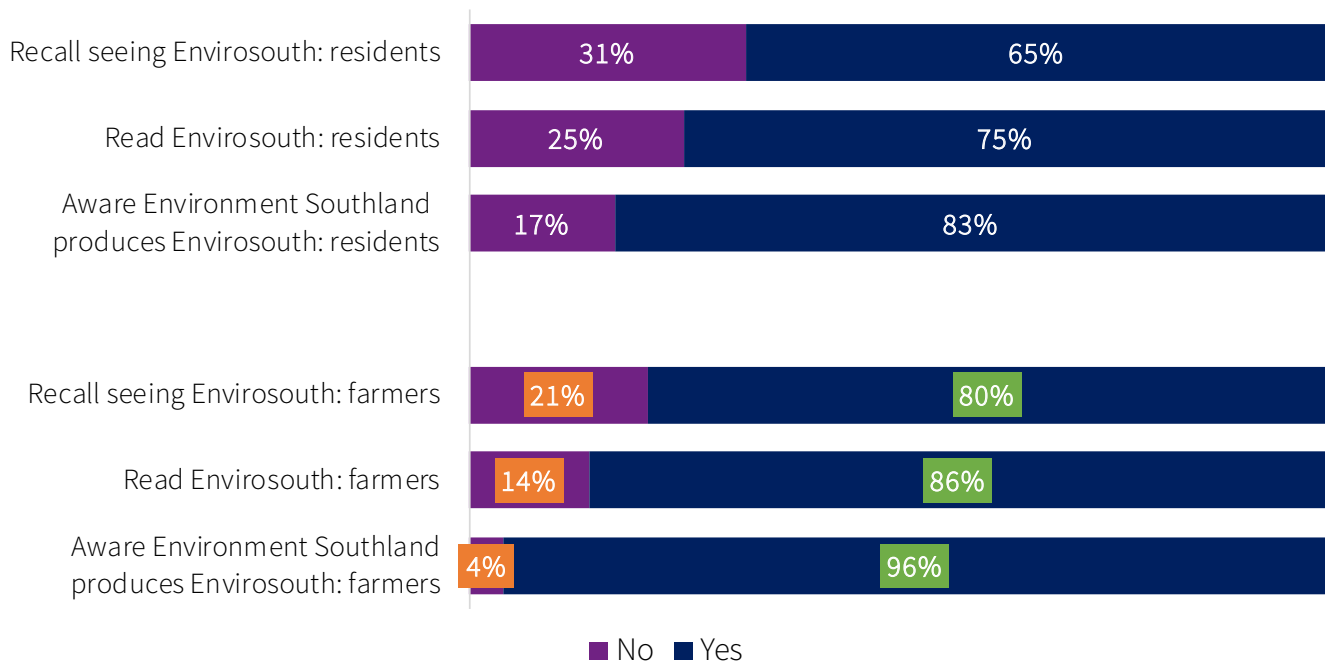
Communication



ENVIROSOUTH AWARENESS AND USAGE: 2018 RESULTS¹⁹

Sixty-five percent of residents recall seeing *Envirosouth*. A further 75% have read *Envirosouth* and 83% are aware Environment Southland produces the publication. Notably this year, significant decreases can be seen in residents mentioning that they recalling seeing *Envirosouth* (65% cf. 2017, 73%) and that they are aware Environment Southland produces the publication (83% cf. 2017, 87%).

Eighty percent of farmers recall seeing *Envirosouth* and 86% have read the publication. Almost all (96%) farmers are aware Environment Southland produces *Envirosouth*. This year, all results for farmers are significantly higher than results for residents. Also of note, this year is a significant increase in readership amongst farmers (86% cf. 2017, 78%) and an increased awareness that Environment Southland produces *Envirosouth* (96% cf. 2017, 91%).



ENVIROSOUTH AWARENESS AND USAGE: 2014 - 2018 RESULTS²⁰

	2018	2017	2016	2015	2014
Recall seeing <i>Envirosouth</i> : residents	65%	73%	69%	76%	74%
Read <i>Envirosouth</i> : residents	75%	77%	73%	76%	79%
Aware Environment Southland produces <i>Envirosouth</i> : residents	83%	87%	79%	84%	82%
Recall seeing <i>Envirosouth</i> : farmers	80%	82%	83%	90%	83%
Read <i>Envirosouth</i> : farmers	86%	78%	84%	81%	78%
Aware Environment Southland produces <i>Envirosouth</i> : farmers	96%	91%	91%	92%	95%

¹⁹ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

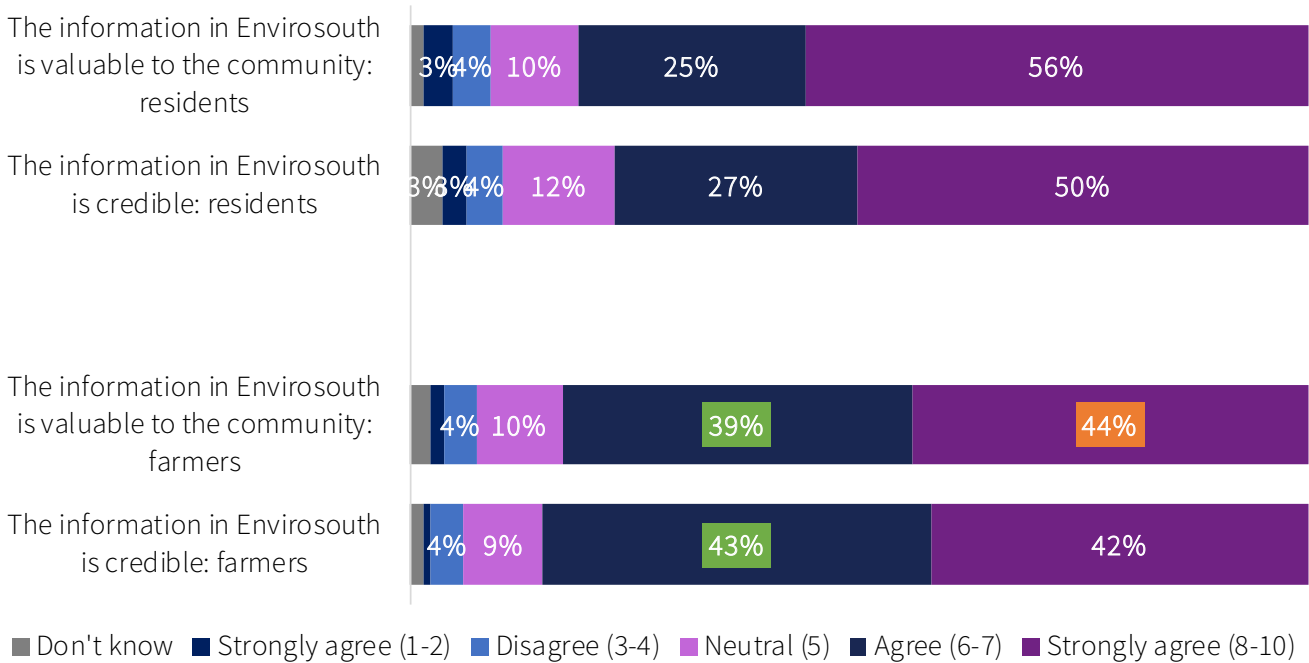
²⁰ Green shading indicates that the result for 2018 is significantly higher than the result from 2017. Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.

Communication



ENVIROSOUTH PERCEPTIONS: 2018 RESULTS²¹

Eighty-one percent of residents agree (25%) or strongly agree (56%) that the information in *Envirosouth* is valuable to the community; amongst farmers 83% agree (39%) or strongly agree (44%) with this. Around three quarters (77%) of residents agree (27%) or strongly agree (50%) that the information in *Envirosouth* is credible; amongst farmers 85% agree (43%) or strongly agree (42%). Notably, farmers are more likely than residents to agree with the perceptions of *Envirosouth*. Compared to last year's results, agreement amongst residents that the information in *Envirosouth* is valuable to the community has increased significantly (81% cf. 2017, 76%).



ENVIROSOUTH PERCEPTIONS: 2014 - 2018 RESULTS²²

	2018	2017	2016	2015	2014
The information in <i>Envirosouth</i> is valuable to the community: residents	81%	76%	74%	84%	84%
The information in <i>Envirosouth</i> is credible: residents	77%	73%	71%	78%	78%
The information in <i>Envirosouth</i> is valuable to the community: farmers	83%	83%	72%	78%	79%
The information in <i>Envirosouth</i> is credible: farmers	85%	85%	67%	77%	73%

²¹ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

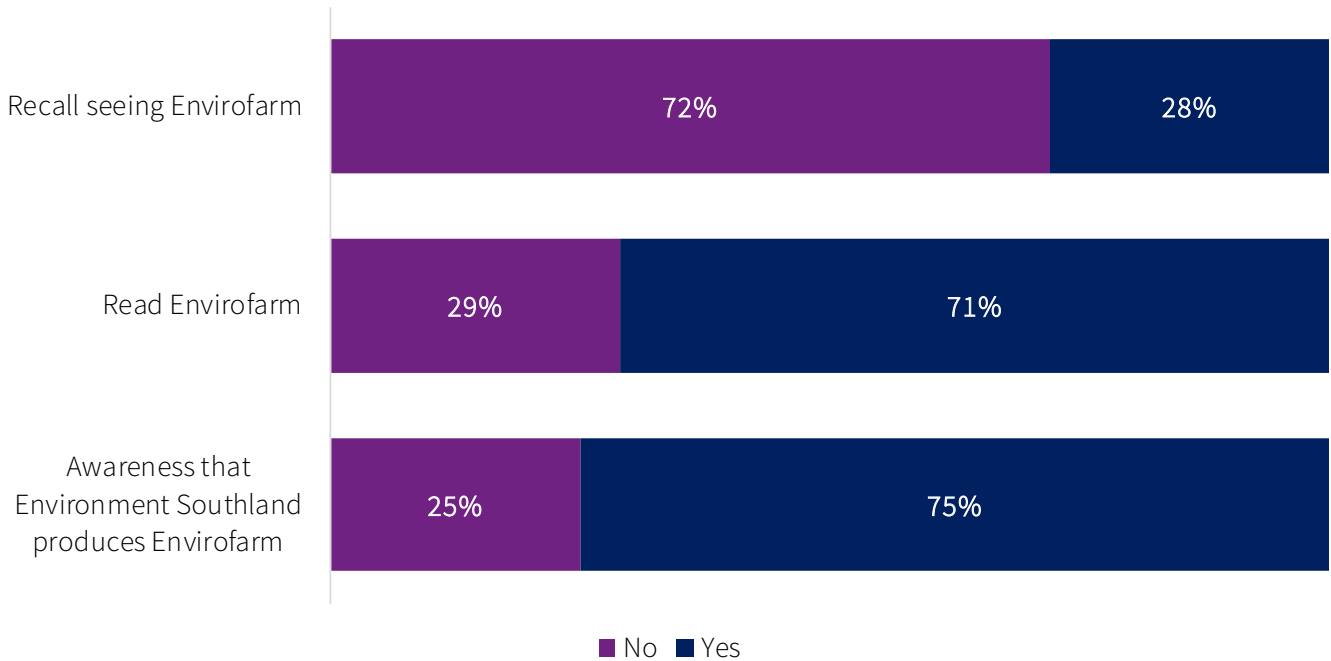
²² Green shading indicates that the result for 2018 is significantly higher than the result from 2017.

Communication



ENVIROFARM AWARENESS AND USAGE: 2018 RESULTS

Around a quarter (28%) of farmers recall seeing *Envirofarm*. Of these farmers, 71% have read *Envirofarm* and 75% are aware Environment Southland produces the publication. Although not statistically significant, readership and awareness that Environment Southland produces *Envirofarm* have increased 8% and 5% respectively.



ENVIROFARM AWARENESS AND USAGE: 2014 - 2018 RESULTS

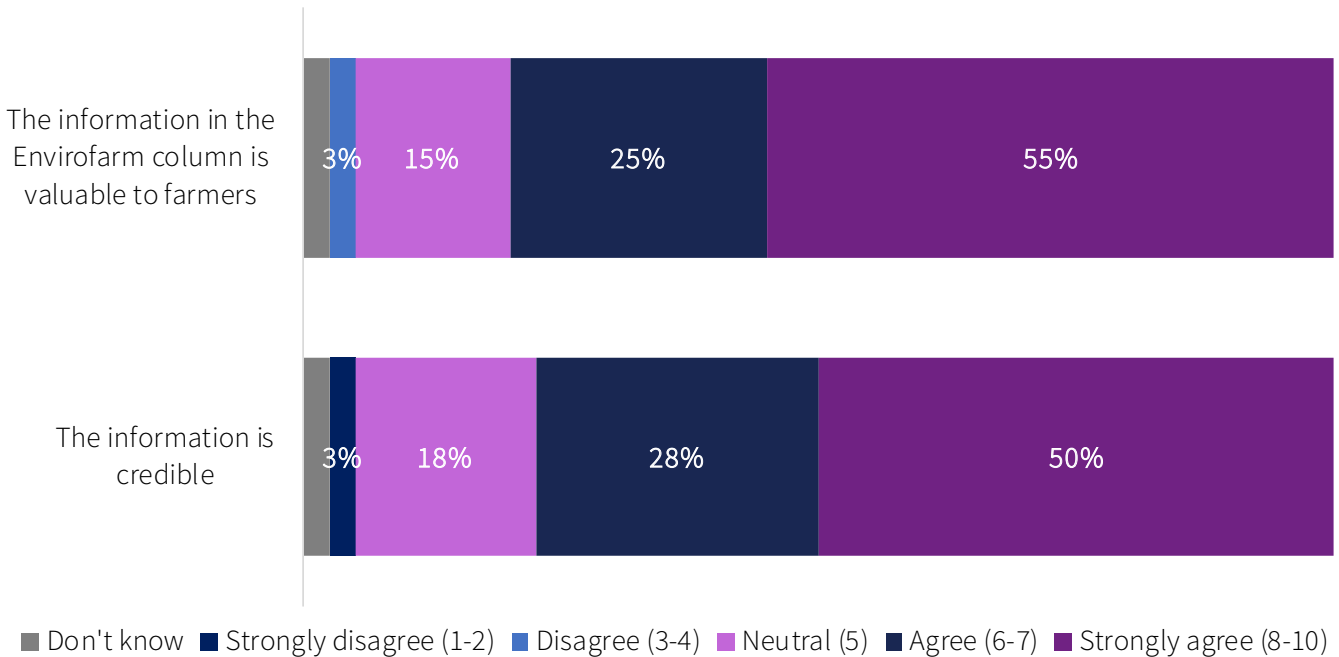
	2018	2017	2016	2015	2014
Recall seeing <i>Envirofarm</i>	28%	28%	27%	29%	37%
Read <i>Envirofarm</i>	71%	63%	30%	72%	82%
Aware Environment Southland produces <i>Envirofarm</i>	75%	70%	75%	78%	82%

Communication



ENVIROFARM PERCEPTIONS: 2018 RESULTS

Over three quarters (80%) of farmers agree (25%) or strongly agree (55%) that the information in *Envirofarm* is valuable to the community. Agreement with this statement has decreased significantly this year (80% cf. 2017, 89%). A further 78% of farmers agree (28%) or strongly agree (50%) that the information in *Envirofarm* is credible. Agreement with this has also decreased significantly this year (78% cf. 2017, 86%).



ENVIROFARM PERCEPTIONS: 2014 - 2018 RESULTS²³

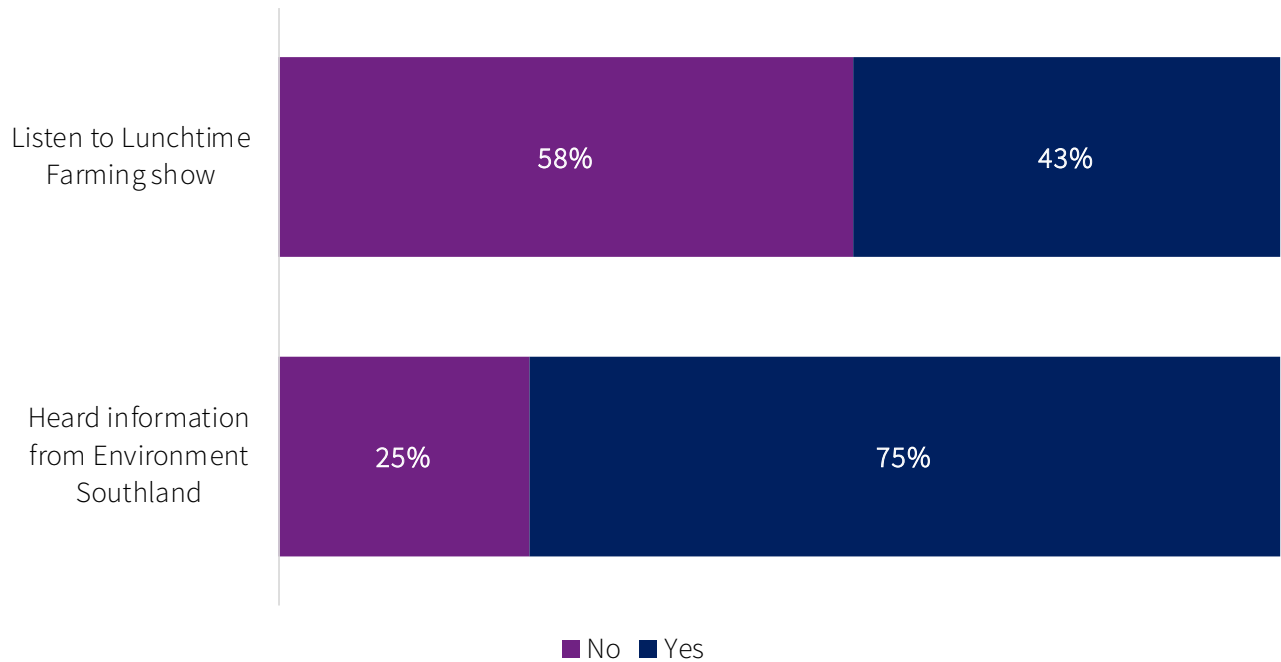
	2018	2017	2016	2015	2014
The information in the <i>Envirofarm</i> column is valuable to farmers	80%	89%	76%	85%	80%
The information is credible	78%	86%	64%	80%	74%

²³ Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.



LUNCHTIME FARMING SHOW AWARENESS: 2018 RESULTS

Just under half (43%) of farmers mention that they listen to the Lunchtime Farming show. Although not statistically significant this is a 7% decrease from 2017's results. Similar to last year's result, 75% of farmers have heard information from Environment Southland on the Lunchtime Farming Show.



LUNCHTIME FARMING SHOW AWARENESS: 2014 - 2018 RESULTS

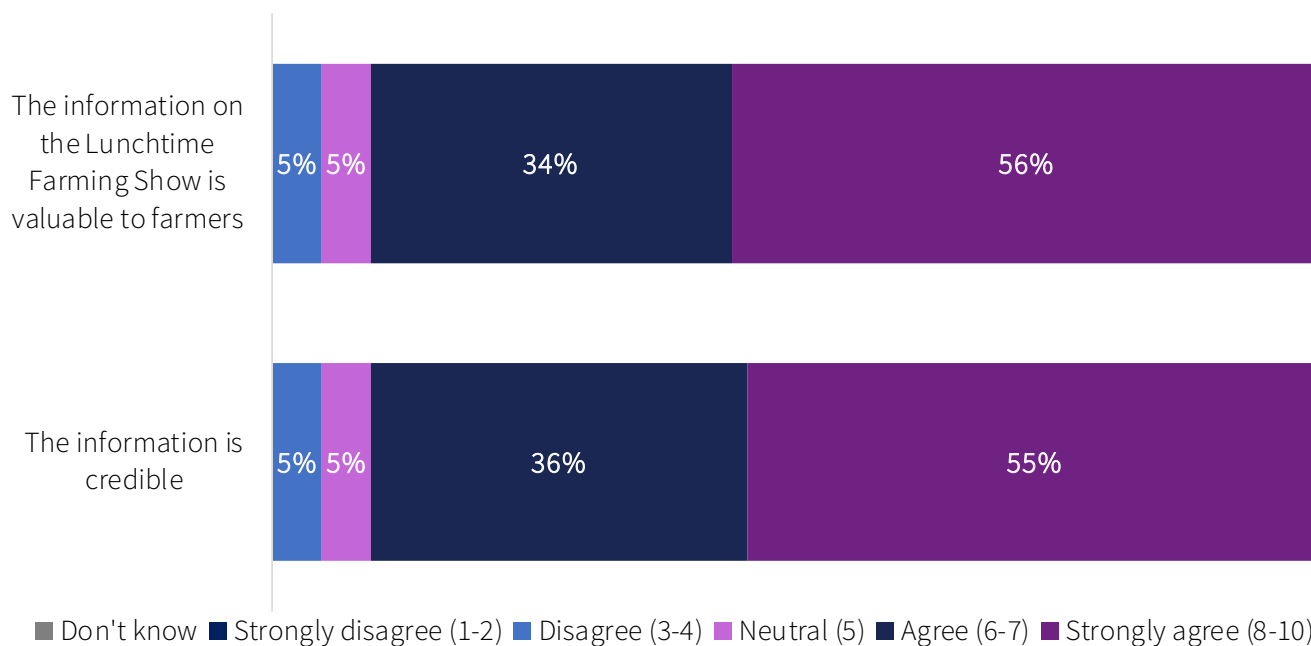
	2018	2017	2016	2015	2014
Listen to Lunchtime Farming Show	43%	50%	46%	48%	50%
Heard information from Environment Southland on the show	75%	72%	64%	59%	73%

Communication



LUNCHTIME FARMING SHOW PERCEPTIONS: 2018 RESULTS

Almost all (90%) farmers agree (34%) or strongly agree (56%) that the information on the Lunchtime Farming Show is valuable: this is on a par with last year's results. A further 91% of farmers agree (36%) or strongly agree (55%) that the information on the Lunchtime Farming Show is credible. Agreement ratings have increased significantly this year (91% cf. 2017, 79%).



LUNCHTIME FARMING SHOW PERCEPTIONS: 2014 - 2018 RESULTS²⁴

	2018	2017	2016	2015	2014
The information on the Lunchtime Farming Show is valuable to farmers	90%	86%	88%	79%	77%
The information is credible	91%	79%	79%	80%	81%

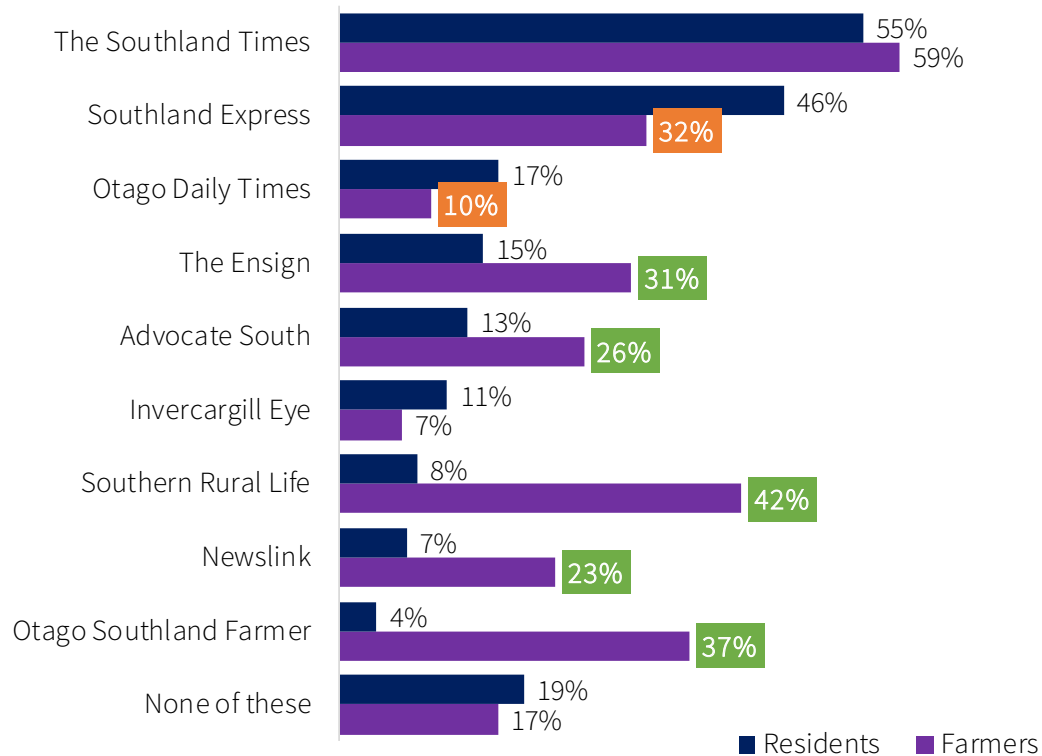
²⁴ Green shading indicates that the result for 2018 is significantly higher than the result from 2017.

Communication



NEWSPAPERS READ REGULARLY: 2018 RESULTS²⁵

The Southland Times is the most popular newspaper amongst both residents (55%) and farmers (59%). Similar to previous years' results, farmers are more likely to mention they read *The Ensign* (31% cf. residents, 15%), *Advocate South* (26% cf. residents, 13%), *Southern Rural Life* (42% cf. residents, 8%), *Newslink* (23% cf. residents, 7%), and *Otago Southland Farmer* (37% cf. residents, 4%). Farmers are also less likely to mention they read *Southland Express* (32% cf. residents, 46%) or *Otago Daily Times* (10% cf. residents, 17%).



²⁵ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

Communication



NEWSPAPERS READ REGULARLY: 2014 - 2018 RESULTS RESIDENTS²⁶

Readership of most newspapers has continued to decline this year. Specifically, readership of *The Southland Times* (55% cf. 2017, 68%), *Southland Express* (46% cf. 2017, 52%), *The Ensign* (15% cf. 2017, 20%), *Advocate South* (13% cf. 2017, 23%), *Invercargill Eye* (11% cf. 2017, 35%), *Newslink* (7% cf. 2017, 20%), and *Otago Southland Farmer* (4% cf. 2017, 9%) have decreased significantly this year.

Amongst farmers newspaper readership has also continued to decrease this year. Notably, readership of *Southern Rural Life* (42% cf. 2017, 55%), *Otago Southland Farmer* (37% cf. 2017, 53%), *The Ensign* (31% cf. 2017, 42%), *Newslink* (23% cf. 2017, 40%), and *Invercargill Eye* (7% cf. 2017, 13%) has decreased significantly this year.

	2018	2017	2016	2015	2014
The Southland Times	55%	68%	71%	83%	85%
Southland Express	46%	52%	55%	57%	55%
Otago Daily Times	17%	12%	11%	10%	10%
The Ensign	15%	20%	20%	25%	19%
Advocate South	13%	23%	19%	24%	17%
Invercargill Eye	11%	35%	40%	36%	43%
Newslink	7%	20%	21%	28%	17%
Southern Rural Life	8%	10%	12%	15%	9%
Otago Southland Farmer	4%	9%	10%	13%	9%
None	19%	14%	10%	7%	4%



NEWSPAPERS READ REGULARLY: 2014 - 2018 RESULTS FARMERS²⁷

	2018	2017	2016	2015	2014
The Southland Times	59%	67%	83%	84%	82%
Southern Rural Life	42%	55%	58%	66%	48%
Otago Southland Farmer	37%	53%	53%	60%	50%
Southland Express	32%	38%	47%	43%	38%
The Ensign	31%	42%	37%	49%	45%
Advocate South	26%	34%	41%	44%	23%
Newslink	23%	40%	41%	45%	40%
Otago Daily Times	10%	9%	10%	8%	15%
Invercargill Eye	7%	13%	14%	16%	9%
None	17%	9%	6%	6%	3%

²⁶ Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.

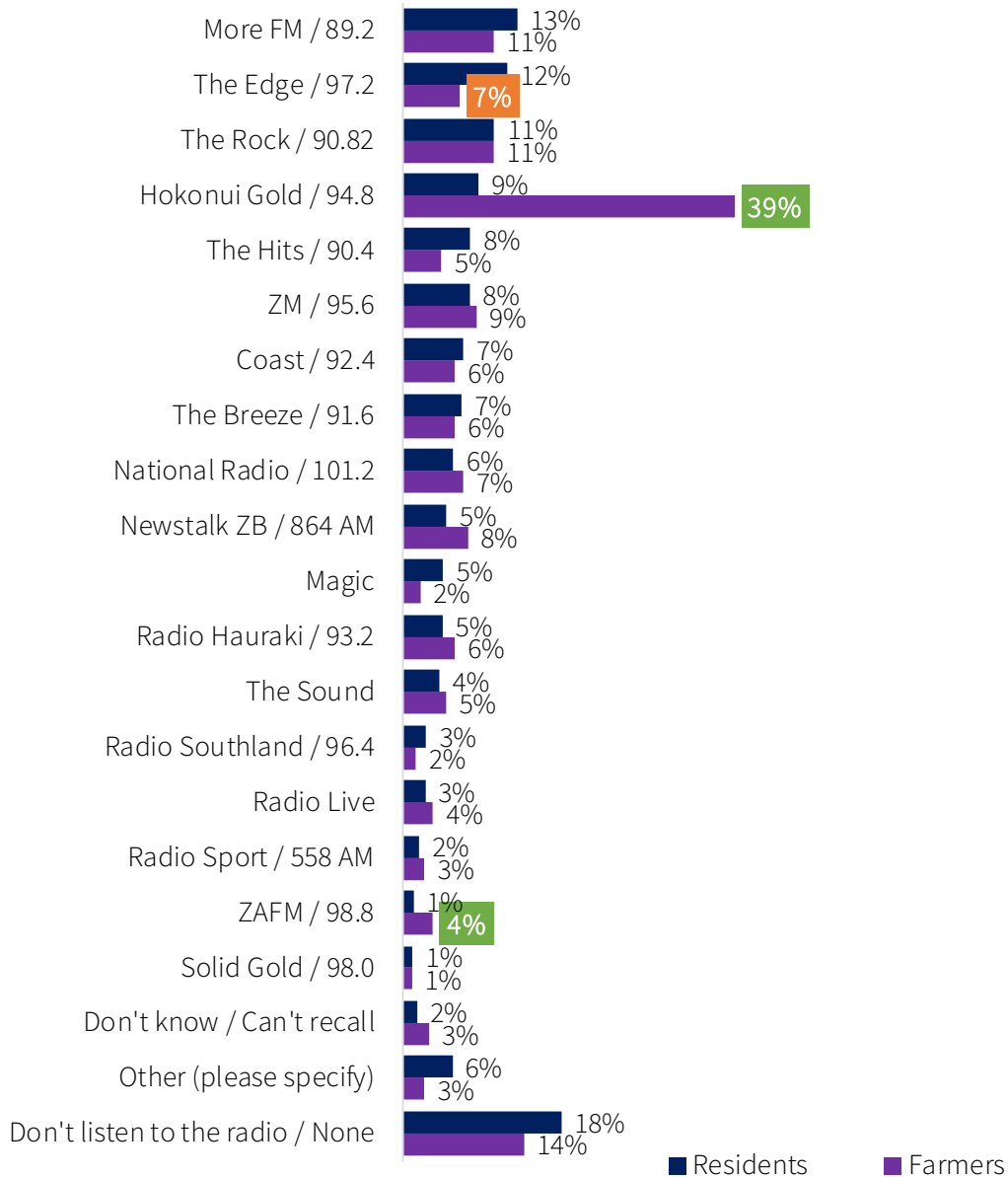
²⁷ Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.

Communication



RADIO STATIONS LISTENERSHIP: 2018 RESULTS²⁸

More FM (residents: 13%, farmers 11%), The Edge (residents: 12%, farmers: 7%) and The Rock (residents: 11%, farmers: 11%) are the most popular radio stations amongst residents and farmers. Notably, farmers are more likely to mention they listen to Hokonui Gold (39% cf. residents, 9%) and ZAFM (4% cf. residents, 1%), and are less likely to listen to The Edge (7% cf. residents, 12%).



²⁸ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

Communication



RADIO STATION LISTENERSHIP: 2014 - 2018 RESULTS RESIDENTS²⁹

Radio station listenership is on a par with last year's results amongst residents. However, the number of residents mentioning that they do not listen to the radio has increased significantly this year (18% cf. 2017, 12%).

	2018	2017	2016	2015	2014
More FM	13%	14%	17%	14%	12%
The Rock	11%	10%	15%	9%	13%
The Edge	12%	10%	13%	9%	12%
Hokonui Gold	9%	9%	13%	12%	9%
ZM	8%	9%	10%	8%	7%
The Hits	8%	6%	6%	8%	10%
The Breeze	7%	5%	6%	7%	4%
Coast	7%	9%	11%	9%	11%
National Radio	6%	7%	6%	8%	8%
Newstalk ZB	5%	4%	6%	5%	6%
Radio Hauraki	5%	6%	6%	3%	4%
The Sound	4%	6%	7%	5%	4%
Radio Live	3%	5%	6%	6%	4%
Radio Sport	2%	3%	3%	3%	2%
Solid Gold	1%	1%	3%	2%	2%
Something else	6%	5%	10%	4%	3%
Don't listen to the radio	18%	12%	10%	14%	14%

²⁹ Green shading indicates that the result for 2018 is significantly higher than the result from 2017.

Communication



RADIO STATION LISTENERSHIP: 2014 - 2018 RESULTS FARMERS³⁰

This year farmers are less likely to mention that they listen to The Rock (11% cf. 2017, 20%), however all other results remain on a par with 2017's results.

	2018	2017	2016	2015	2014
Hokonui Gold	39%	42%	45%	46%	45%
The Rock	11%	20%	7%	14%	7%
More FM	11%	10%	11%	8%	9%
ZM	9%	8%	5%	3%	9%
Newstalk ZB	8%	5%	8%	6%	2%
The Edge	7%	11%	8%	8%	9%
Radio Hauraki	6%	9%	4%	4%	2%
Coast	6%	6%	5%	6%	9%
The Breeze	6%	8%	5%	5%	9%
The Sound	5%	6%	6%	4%	6%
The Hits	5%	3%	3%	4%	11%
Radio Live	4%	2%	5%	3%	4%
Radio Sport	3%	5%	2%	2%	4%
Solid Gold	1%	2%	1%	-	3%
National Radio	7%	2%	10%	6%	10%
Something else	3%	4%	11%	2%	3%
Don't listen to the radio	14%	10%	9%	11%	14%

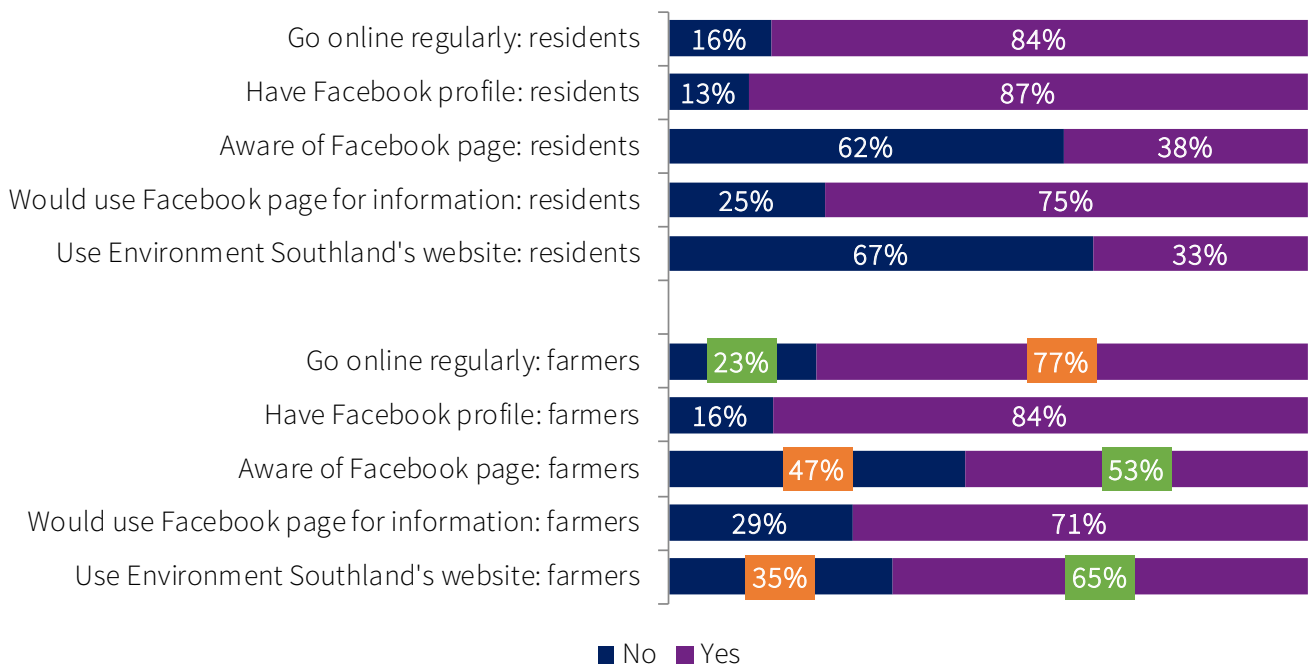
³⁰ Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.

Communication



INTERNET AND SOCIAL MEDIA USAGE: 2018 RESULTS³¹

Eighty-four percent of residents mention that they go online regularly, with a further 87% mentioning that they have a Facebook profile; this is a significant increase from last year's results (87% cf. 2017, 83%). Significantly fewer farmers mention that they go online regularly (77%). Just over one third (38%) of residents and half of farmers (53%) are aware Environment Southland has a Facebook page and 75% of residents and 71% of farmers mention they would use the page to gather information; the residents' results are also a significant increase from last year's results (75% cf. 2017, 69%). One third of residents (33%) and over half of farmers (65%) use the Environment Southland website.



INTERNET AND SOCIAL MEDIA USAGE: 2014 - 2018 RESULTS³²

	2018	2017	2016	2015	2014
Go online regularly: residents	84%	85%	78%	72%	74%
Have Facebook profile: residents	87%	83%	82%	77%	67%
Aware Environment Southland has a Facebook page: residents	38%	38%	33%	31%	25%
Would use Environment Southland's Facebook page: residents	75%	69%	64%	60%	55%
Use the website: residents	33%	26%	17%	30%	26%
Go online regularly: farmers	77%	77%	72%	74%	75%
Have Facebook profile: farmers	84%	74%	65%	54%	50%
Aware Environment Southland has a Facebook page: farmers	53%	55%	49%	41%	28%
Would use Environment Southland's Facebook page: farmers	71%	66%	51%	44%	46%
Use the website: farmers	65%	66%	39%	48%	55%

³¹ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

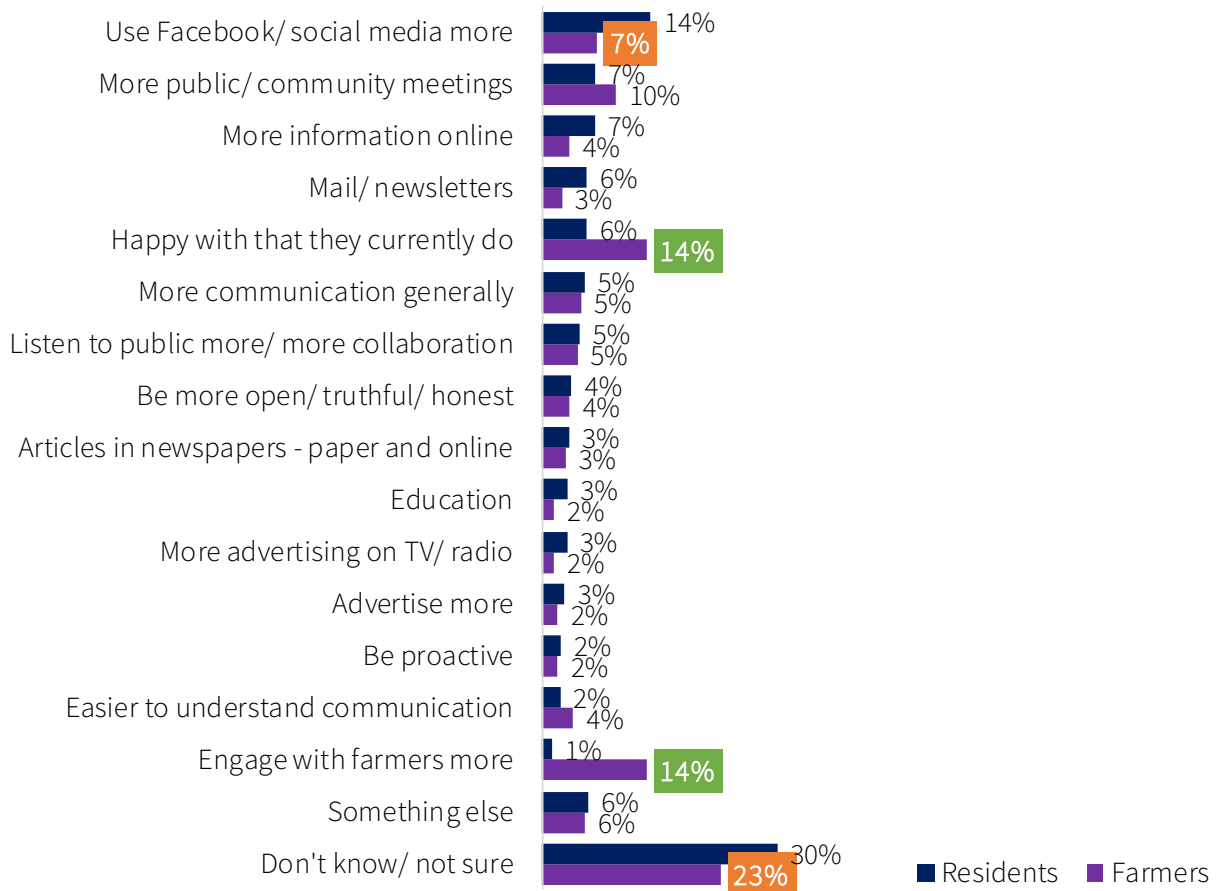
³² Green shading indicates that the result for 2018 is significantly higher than the result from 2017.

Communication



IMPROVEMENTS TO COMMUNICATION: 2018 RESULTS³³

Residents mention that Environment Southland could improve communication to the region through using Facebook or social media more (14%), more public or community meetings (7%), and having more information online (7%). Farmers are more likely to mention Environment Southland could improve their communication by engaging more with farmers (14% cf. residents, 1%). Farmers are also more likely to mention that they are happy with what Environment Southland currently do (14% cf. residents, 6%).



³³ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

Communication



IMPROVEMENTS TO COMMUNICATION: 2017 - 2018 RESIDENTS RESULTS³⁴

Compared to last year's results, residents are more likely to mention that Environment Southland could run more public or community meetings (7% cf. 2017, 3%) and provide more information online (7% cf. 2017, 3%). Residents are also less likely to mention that they are happy with what Environment Southland currently do (6% cf. 2017, 11%).

	2018	2017
Use Facebook/ social media more	14%	11%
More public/ community meetings	7%	3%
More information online	7%	3%
Happy with that they currently do	6%	11%
Mail/ newsletters	6%	6%
More communication generally	5%	4%
Listen to public more/ more collaboration	5%	5%
Be more open/ truthful/ honest	4%	4%
Articles in newspapers - paper and online	3%	4%
Education	3%	2%
Advertise more	3%	5%
Be proactive	2%	2%
Easier to understand	2%	2%
Engage with farmers more	1%	2%
Something else	6%	5%
Don't know/ not sure	30%	25%

³⁴ Green shading indicates that the result for 2018 is significantly higher than the result from 2017. Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.

Communication



IMPROVEMENTS TO COMMUNICATION: 2017 - 2018 FARMERS RESULTS³⁵

This year farmers are more likely to mention that Environment Southland should run more public or community meetings (10% cf. 2017, 3%) and that they should use Facebook or social media more (7% cf. 2017, 2%).

	2018	2017
Happy with that they currently do	14%	17%
Engage with farmers more	14%	11%
More public/ community meetings	10%	3%
Use Facebook/ social media more	7%	2%
Listen to public more/ more collaboration	5%	7%
More communication generally	5%	5%
More information online	4%	5%
Be more open/ truthful/ honest	4%	3%
Easier to understand	4%	0%
Articles in newspapers - paper and online	3%	5%
Mail/ newsletters	3%	3%
Be proactive	2%	3%
Education	2%	1%
Advertise more	2%	1%
Something else	6%	7%
Don't know/ not sure	23%	25%

³⁵ Green shading indicates that the result for 2018 is significantly higher than the result from 2017.

Communication | Summary of Findings

Detailed below are area, age and gender differences which are significantly higher than the total result.



AREA DIFFERENCES

INVERCARGILL

Gather information about Environment Southland from other people (32%), *Enviroweek* (20%), and on their rates accounts (18%). Strongly agree (8-10) Environment Southland provides credible information (43%) and residents trust the information they get from Environment Southland (43%).

GORE

Agree (6-7) that they trust the information from Environment Southland (38%) and that the information from Environment Southland is valuable (38%).

SOUTHLAND

No statistically significant differences noted.



DEMOGRAPHIC DIFFERENCES

AGE



Gather information about Environment Southland on the internet (21%) and Facebook (12%). Also mention that they don't get any information from Environment Southland (10%).

Mention Environment Southland could improve their communication by using Facebook or social media more (24%).



Disagree (3-4) that the information from Environment Southland is valuable (10%).



Gather information about Environment Southland through newspapers (71%), flyers in their letterbox (56%), *Envirosouth* (48%), from other people (41%), *Enviroweek* (34%), in rates accounts (31%), and through personal contact (7%).

Strongly agree (8-10) that the information from Environment Southland is credible (51%), that they trust the information from Environment Southland (47%), and that the information from Environment Southland is valuable.

GENDER



Gather information through flyers in the letterbox (37%), from other people (33%), *Enviroweek* (21%), and at Environment Southland's offices (5%).



Gather information through the internet (18%).

Communication | Summary of Findings

Continued

Detailed below are area, age and gender differences which are significantly higher than the total result.



AREA DIFFERENCES

INVERCARGILL

Read *Southland Express* (64%) and *Invercargill Eye* (17%). Also mention that they do not read the paper (23%). Listen to ZM (11%) and Radio Live (4%).

GORE

Read *The Ensign* (79%), *Newslink* (33%), and *Otago Southland Farmer* (8%). Listen to Hokonui Gold (24%).

SOUTHLAND

Read *Advocate South* (34%), *Southern Rural Life* (13%), and *Otago Southland Farmer* (6%). Listen to Hokonui Gold (12%).



DEMOGRAPHIC DIFFERENCES

AGE



Do not recall seeing *Envirosouth* (48%) and have not read *Envirosouth* (39%).



No statistically significant differences noted.



Strongly agree (8-10) that the information in *Enviroweek* is valuable to the community (67%). Recall seeing *Envirosouth* (87%) and have read *Envirosouth* (84%). Strongly agree (8-10) that the information in *Envirosouth* is credible (60%) and information is valuable to the community (62%).

GENDER



Strongly disagree (1-2) that the information in *Enviroweek* is credible (4%) and valuable to the community (6%).



No statistically significant differences noted.

Civil Defence

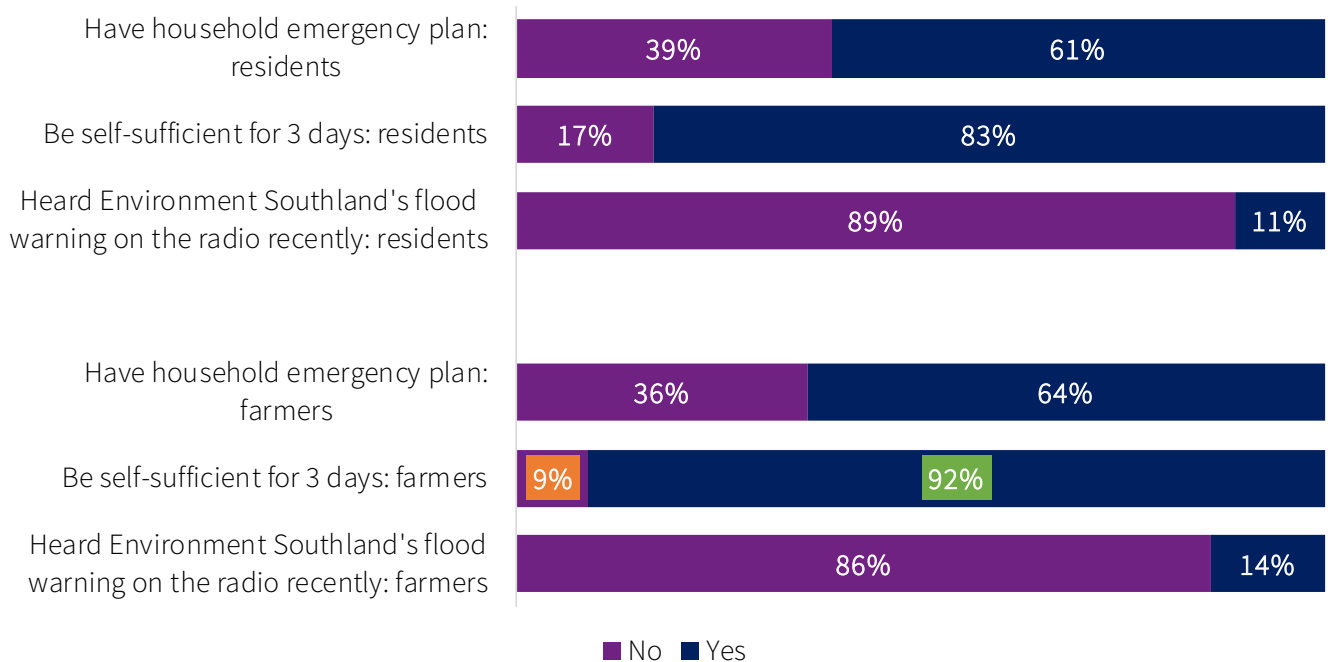
The background features a vertical gradient from purple at the top to blue at the bottom. A pattern of binary code (0s and 1s) is overlaid on the left side, appearing to recede into the distance. Overlapping circles of varying sizes are scattered across the entire background, creating a sense of depth and digital connectivity.

Civil Defence



CIVIL DEFENCE: 2018 RESULTS³⁶

Sixty-one percent of residents mention that they have a household emergency plan, with a further 83% indicating that they could be self-sufficient for three days. Eleven percent of residents heard Environment Southland's flood warnings, a significant decrease from last year's results (11% cf. 2017, 16%). Amongst farmers, 64% have an emergency plan, a significant increase from last year's results (64% cf. 2017, 52%). Almost all (92%) could be self-sufficient for three days, this is significantly higher than the residents' results. A further 14% of farmers heard Environment Southland's flood warnings, a significant decrease from 2017's results (14% cf. 2017, 22%).



HOUSEHOLD EMERGENCY PLAN: 2014, 2016 - 2018 RESULTS³⁷

	2018	2017	2016	2014
Have a household emergency plan: residents	61%	57%	51%	58%
Be self-sufficient for 3 days: residents	83%	81%	78%	-
Heard Environment Southland's flood warnings: residents	11%	16%	77%	-
Have a household emergency plan: farmers	64%	52%	51%	56%
Be self-sufficient for 3 days: farmers	92%	92%	89%	-
Heard Environment Southland's flood warnings: farmers	14%	22%	70%	-

³⁶ Green shading indicates that the result for farmers is significantly higher than the result for residents. Orange shading indicates that the result for farmers is significantly lower than the result for residents.

³⁷ Green shading indicates that the result for 2018 is significantly higher than the result from 2017. Orange shading indicates that the result for 2018 is significantly lower than the result from 2017.

Civil Defence | Summary of Findings

Detailed below are area, age and gender differences which are significantly higher than the total result.



AREA DIFFERENCES

INVERCARGILL

Would not be self-sufficient for three days (21%).

GORE

No statistically significant differences noted.

SOUTHLAND

Would be self-sufficient for three days (90%).



DEMOGRAPHIC DIFFERENCES

AGE



Do not have a household emergency plan (53%).
Would not be self-sufficient for at least three days (27%).



No statistically significant differences noted.



Have a household emergency plan (74%).
Would be self-sufficient for at least three days (96%).

GENDER



Would be self-sufficient for at least three days (87%).



Would not be self-sufficient for at least three days (20%).



Summary of Findings

Summary of Findings

Unprompted awareness of Environment Southland has again increased this year amongst residents; farmers remain significantly more aware of Environment Southland than residents.

Impressions and ratings of Environment Southland remain on a par with previous years' results, with farmers continuing to rate Environment Southland more positively than residents.

Although water, water quality and water pollution remain the biggest priority for Southland's environment, concerns about rubbish, plastic and recycling have increased significantly this year amongst both residents and farmers.

This year, more residents are using the existing Environment Southland information sources. Impressions of the information Environment Southland provides to the community remain on a par with previous years' results amongst both residents and farmers.

Awareness, readership, awareness that Environment Southland produces *Enviroweek*, and impressions of the information within the publication remain on a par with 2017's results. In line with these results, farmers are more likely to recall seeing *Enviroweek* and to be aware Environment Southland produces the publication.

Residents recall of *Envirosouth* and awareness that

Environment Southland produces the publication have decreased significantly this year, while the number of farmers who mention that they have read *Envirosouth* and are aware that Environment Southland produces it have increased significantly this year.

Awareness and readership of *Envirofarm* is on a par with last year's results, however perceptions of the publication have decreased significantly this year. Levels of listenership and farmers hearing information from Environment Southland on the Lunchtime Farming Show also remain similar to last year's results, while perceptions that the information is credible have increased significantly this year.

Newspaper readership in general has decreased this year amongst both residents and farmers. Amongst residents, use of Facebook and Environment Southland's website has increased significantly, while the number of farmers with a Facebook profile has also significantly increased.

Civil defence measures remain similar to last year's results, however this year significantly fewer residents have heard Environment Southland's flood warnings on the radio. This year significantly more farmers have a household emergency plan, while significantly fewer farmers heard Environment Southland's flood warnings.

Points to Consider

ENGAGEMENT AND AWARENESS

Awareness of Environment Southland has increased significantly this year amongst residents. It also appears that residents have sourced more information about Environment Southland in the past 12 months, with significant increases across a number of information sources. Environment Southland should give consideration to how best to communicate and engage with residents, as there hasn't been an increase in awareness or use of Environment Southland produced publications amongst residents.

DECREASE IN NEWSPAPER READERSHIP

This year shows a significant decrease in newspaper readership, especially amongst residents. This year's decrease continues a steady decline in readership since 2015's results. When assessing how best to communicate with both residents and farmers, this decrease in readership will have an impact on how Environment Southland can reach residents and farmers.

CHANGES IN PERCEPTIONS AMONGST FARMERS

Overall, it's interesting that farmers' perceptions of Environment Southland have remained on a par with last year's results, however there has been a shift from 'strongly agree' to 'agree' ratings and from 'very well' to 'well' ratings. Although this isn't of concern as overall the positive ratings have remained the same, if this trend continues positive ratings will decrease as farmers slip from 'agree' and 'well' to 'neutral' ratings. Consideration needs to be given as to how best to foster a positive view of Environment Southland's work amongst farmers.



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