



Versus
RESEARCH

Environment Southland Perceptions Survey

September 2019

Conducted by Versus Research

Executive Summary

AWARENESS AND IMPRESSIONS

In 2019, there has been a significant decrease in residents who are aware of Environment Southland at an unprompted level (78% cf. 2018, 86%). Unprompted awareness has increased amongst farmers, with 94% aware of Environment Southland this year; a 2% increase from last year's results. Similar to last year, farmers are more likely to be aware of Environment Southland than residents (94% cf. residents, 78%).

Almost all residents (98%) and all farmers (100%) are aware of Environment Southland at a prompted level.

Overall, 43% of residents agree that Environment Southland is a leader in the development of an environmentally sustainable Southland. This is a significant decrease compared with last year (cf. 2018, 49%).

Farmers' impressions of Environment Southland appear to be more positive than residents' impressions, with 55% agreeing that Environment Southland is a leader in the development of an environmentally sustainable Southland (cf. residents 43%).

Farmers are also more likely to give positive ratings for Environment Southland protecting and managing the quality of water (57% cf. residents, 34%), their opportunity to participate (42% cf. residents, 29%), and being informed about the management of natural resources (53% cf. residents 38%).

In a series of questions for 2019, 36% of residents mention they have seen Environment Southland in the local community; comparatively, farmers are more likely to indicate that they have seen Environment Southland in the local community (61%).

The primary mention amongst those who have seen Environment Southland in the local community is seeing them driving or flying around (residents: 37%; farmers: 36%).

Forty-four per cent of residents agree that Environment Southland is an approachable organisation; comparatively 56% of farmers agree with this. Farmers are also more likely to agree that Environment Southland understands Southlanders' aspirations (56% cf. residents, 48%).

ACTIONS

In a series of new questions for 2019, 30% (each) of residents and farmers think Environment Southland listens to the community's views most of the time or all of the time.

Fifteen per cent of residents provided their views to Environment Southland; 34% talked directly to an Environment Southland staff member. Comparatively, 31% farmers provided their views to Environment Southland and 35% talked directly to an Environment Southland staff member. Farmers are more likely to mention that they made a formal submission (24% cf. residents, 9%).

With regards to the topics respondents provided views about; the primary mention for residents is water issues (44%). Farmers are less likely to mention water issues (15%), however, they are more likely to mention the land and water plan (29% cf. residents, 3%), farming issues (18% cf. residents, 2%), and stock wintering or winter grazing (8% cf. residents, 1%).

The primary mentions regarding actions residents had undertaken in the last 12 months are taking household hazardous waste to a transfer station (47%), washing the car on the grass (44%), and being involved in any community clean up or planting days (22%). Farmers are less likely to have undertaken these actions (23%, 32%, and 11% respectively), however, they are most likely to have joined a landcare or catchment group (28% cf. residents, 4%), and disposed of agri-chemicals through an approved service provider (44% cf. residents, 3%).

More than a quarter of residents indicate that they had personally taken actions, or been involved in activities, to try and improve water quality in the region in the last 12 months; farmers are significantly more likely to mention that they have (74% cf. residents, 27%).

The primary action undertaken by residents is picking up rubbish or recycling (22%). Farmers are less likely to mention this (2%), however, are more likely to mention that they fenced off or cleared waterways or excluded stock (61% cf. residents 15%).

Executive Summary

SOUTHLAND'S PRIORITIES

Residents mention the main priority for the region primarily revolves around water, water quality, and water pollution (64% cf. farmers 54%).

Overall, 34% of residents, and 39% of farmers think Environment Southland is responding well or very well to the priorities.

Twenty-one per cent of residents think Environment Southland is doing a better job than last year. Amongst farmers, 30% think Environment Southland is doing a better job than last year. This year, the farmers' result is significantly higher than the residents' results.

The primary reason for mentioning Environment Southland is doing a better job than last year relates to increased awareness (residents: 23%, farmers 13%).

A quarter of residents (25%) think Environment Southland is not doing a better job than last year, while 32% of farmers think Environment Southland is not doing a better job. The farmers' result is significantly higher than the residents' results.

The primary reasons for mentioning that Environment Southland is not doing a better job than last year relate to no changes being made or that nothing is different (residents: 40%; farmers: 43%).

COMMUNICATION

The primary sources of information about Environment Southland are newspapers (residents: 35%, farmers: 36%), Environment Southland publications (residents: 17%, farmers: 24%), and information generally in the media (residents: 16%, farmers: 18%).

More than half of residents (58%) agree that the information Environment Southland provides is credible; comparatively 60% of farmers rate this positively. A further 57% of residents agree that they trust the information from Environment Southland, while 60% of farmers rate this positively. Regarding the information from Environment Southland being valuable, 60% (each) of residents and farmers rate this positively. Decreases can be seen across these measures compared with last year's results.

Regarding how Environment Southland can improve communication, 22% of residents, and 21% of farmers are unsure. The highest mention regarding

communication improvements is to use Facebook or social media more (residents: 11%, farmers: 3%).

In terms of newspapers readership, *Southland Express* is the leading newspaper read by residents (53% cf. farmers, 43%), while farmers are more likely to read *The Southland Times* (62% cf. residents, 52%).

Close to half of residents (48%) recall seeing *Enviroweek*. A further 72% have read *Enviroweek*, and 68% are aware Environment Southland produces the publication. Fifty-seven per cent of farmers recall seeing *Enviroweek*, while a further 75% of farmers read *Enviroweek*, and 83% are aware Environment Southland produces the publication. This year, there is a significant increase in readership amongst residents (72% cf. 2018, 64%).

Eighty-one per cent of residents agree that the information in *Enviroweek* is valuable to the community; 74% of farmers agree with this. A further 76% of residents agree that the information in *Enviroweek* is credible; 70% of farmers agree with this. Compared to 2018's results, agreement amongst farmers that the information in *Enviroweek* is credible has significantly decreased (70% cf. 2018, 86%).

Sixty-five per cent of residents recall seeing *Envirosouth*. A further 82% have read *Envirosouth*, and 83% are aware Environment Southland produces the publication. There is a significant increase in residents mentioning that they read *Envirosouth* (82% cf. 2018, 75%).

Eighty-four per cent of farmers recall seeing *Envirosouth* and 77% have read the publication. Almost all farmers (98%) are aware Environment Southland produces *Envirosouth*. This year, there is a significant decrease in readership amongst farmers (77% cf. 2018, 86%).

Seventy-eight per cent of residents agree that the information in *Envirosouth* is valuable to the community; amongst farmers, 75% agree with this. Seventy-two per cent of residents agree that the information in *Envirosouth* is credible; amongst farmers, 73% agree with this. Compared to 2018's results, agreement amongst farmers that the information in *Envirosouth* is credible has significantly decreased (73% cf. 2018, 85%).

Executive Summary

Twenty-eight per cent of farmers recall seeing *Envirofarm* in 2019. A further 73% have read *Envirofarm*, and 89% are aware it is produced by Environment Southland. Readership and awareness that Environment Southland produces *Envirofarm* have increased by 2% and 14%, respectively.

Seventy per cent of farmers agree that the information in *Envirofarm* is valuable to the community, while 71% agree that the information in *Envirofarm* is credible.

Amongst residents, More FM (14%), and The Rock (10%) are the most popular radio stations in 2019. Farmers are more likely to mention they listen to Hokonui Gold (35% cf. residents, 8%), and Radio Live (3% cf. residents, 1%).

Forty-two per cent of farmers mention that they listen to the lunchtime farming show, while 77% of farmers have heard information from Environment Southland on the lunchtime farming show. These results remain similar to 2018's results.

Seventy-nine per cent of farmers agree that the information on the lunchtime farming show is valuable, while 75% of farmers agree that the information on the lunchtime farming show is credible.

Agreement ratings that the information on the lunchtime farming show is credible have significantly decreased this year (75% cf. 2018, 91%).

More than three-quarters of residents (81%) mention they go online regularly, while 84% indicate that they have a Facebook profile. Close to half of residents are aware Environment Southland has a Facebook page, a significant increase from last year's results (45% cf. 2018, 38%). Seventy-eight per cent of residents would use the Facebook page to source information, while 35% would use the website.

Amongst farmers, 78% mention they go online regularly, while 74% have a Facebook profile, a significant decrease from last year's result (cf. 2018, 84%). Half of farmers are aware Environment Southland has a Facebook page (50%), while 61% indicate that they would use Environment Southland's Facebook page for information. Fifty-eight per cent of farmers also mention they use Environment Southland's website.

In a series of new questions for 2019, respondents were asked what Facebook pages they regularly engage with. The primary mention is the Stuff Facebook page (residents: 65%, farmers: 58%). Fifty-five per cent of residents get their daily news from the Stuff app or website, while 49% of farmers use this platform. Less than a quarter of residents (23%), and 22% of farmers access international sites to get their daily news.

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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, and currently communicates information about its role and activities in the region to stakeholder groups and the wider community via several different methods including 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 2019, Versus Research was 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 has been used for data collection. This included Computer-Aided Telephone Interviewing (CATI) as well as online interviewing. Online interviewing was again 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=437 (n=300 residents and n=137 farmers) interviews were completed via CATI and a total of n=413 responses (n=350 residents and n=63 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 region.

CATI and online data collection was undertaken between August 7th and 30th, 2019. Telephone

numbers for CATI were supplied by Equifax, while the online sample was sourced through social media.

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

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 age and gender weights have been taken from the 2013 Census (Statistics New Zealand).

The proportions used are shown in the table below:

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

Sample Breakdown

The unweighted sample profile for this work is outlined below.



GENDER

32%
Male

68%
Female



AGE

21%
Under 39

36%
49 to 59
years

43%
60 years
or older



AREA

13%
Gore

58%
Invercargill

29%
Southland



HOUSEHOLD SITUATION

10%
Young, single,
couple, or group
with no children

20%
Family with
school aged
children

68%
Family, couple
with no children
at home



RATEPAYER STATUS

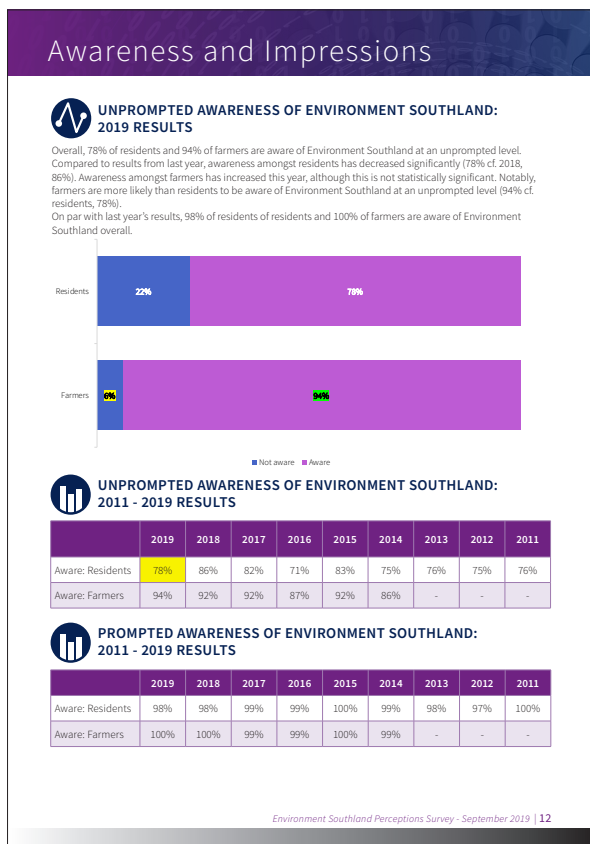
83%
Yes

14%
No

3%
Prefer not to
say

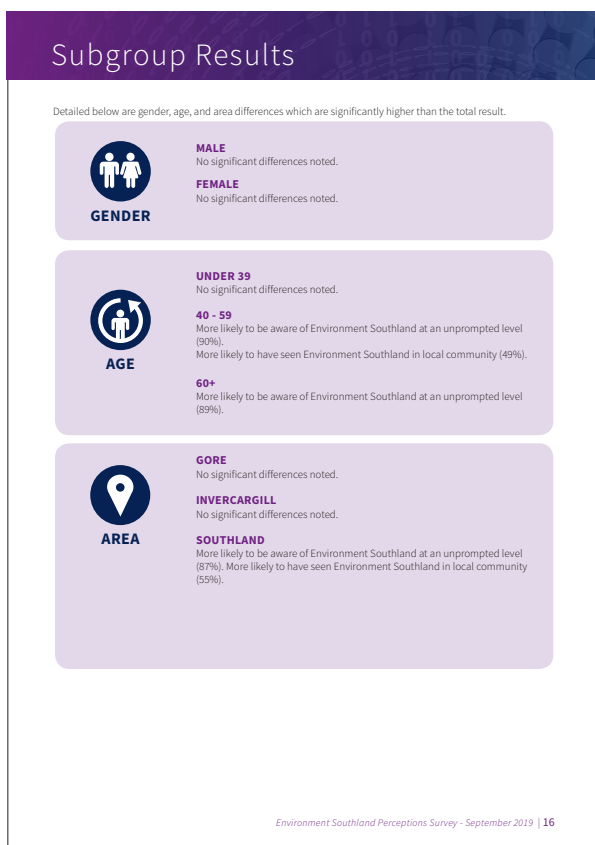
Reading This Report

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



2019's total level results for residents and farmers are shown in the charts. 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' result is significantly higher than the residents' result, while **yellow** shading indicates the farmers' result is significantly lower than the residents' result.

When applicable, 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 2019's results to 2018's. Any significant changes are again shown using shading; **green** shading indicates there has been a significant increase from 2018's results, while **yellow** shading indicates a significant decrease from 2018's results.



At the end of each section, gender, age, and area differences are displayed. This page shows subgroup results which are significantly higher than the total results.



Awareness and Impressions

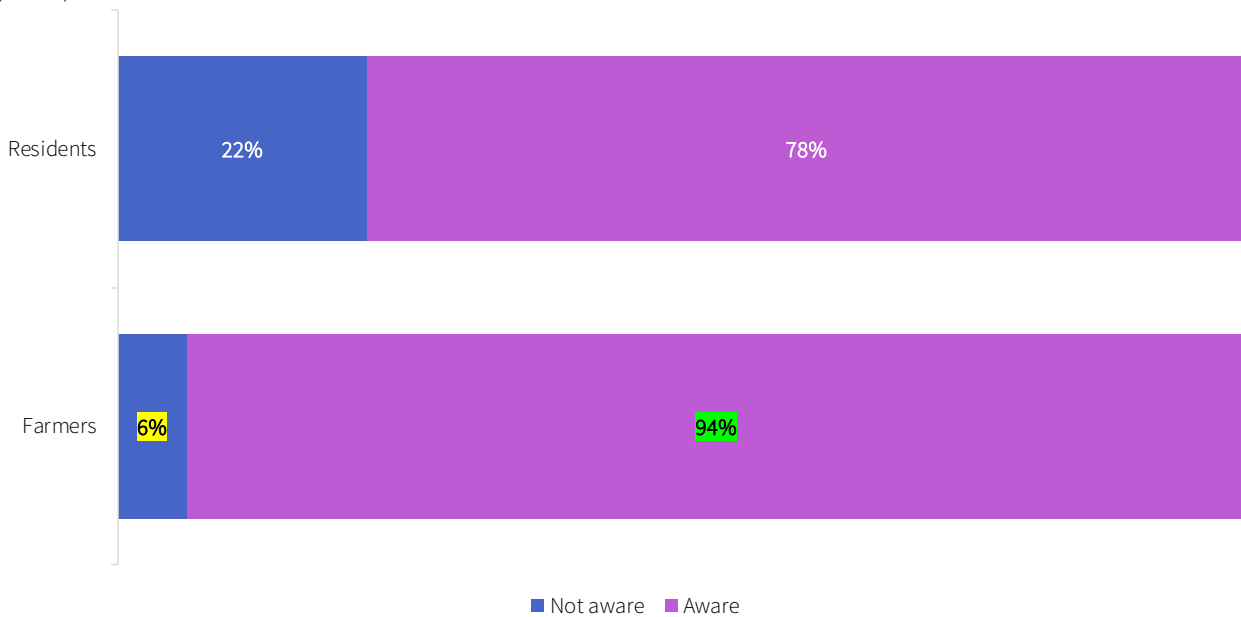
Awareness and Impressions



UNPROMPTED AWARENESS OF ENVIRONMENT SOUTHLAND: 2019 RESULTS

Overall, 78% of residents, and 94% of farmers are aware of Environment Southland at an unprompted level in 2019. Compared to results from last year, awareness amongst residents has significantly decreased (78% cf. 2018, 86%). Awareness amongst farmers has increased this year, although this is not statistically significant. Notably, farmers are more likely than residents to be aware of Environment Southland at an unprompted level (94% cf. residents, 78%).

On par with last year's results, 98% of residents, and 100% of farmers are aware of Environment Southland at a prompted level.



UNPROMPTED AWARENESS OF ENVIRONMENT SOUTHLAND: 2014 - 2019 RESULTS

	2019	2018	2017	2016	2015	2014
Aware: Residents	78%	86%	82%	71%	83%	75%
Aware: Farmers	94%	92%	92%	87%	92%	86%



PROMPTED AWARENESS OF ENVIRONMENT SOUTHLAND: 2014 - 2019 RESULTS

	2019	2018	2017	2016	2015	2014
Aware: Residents	98%	98%	99%	99%	100%	99%
Aware: Farmers	100%	100%	99%	99%	100%	99%

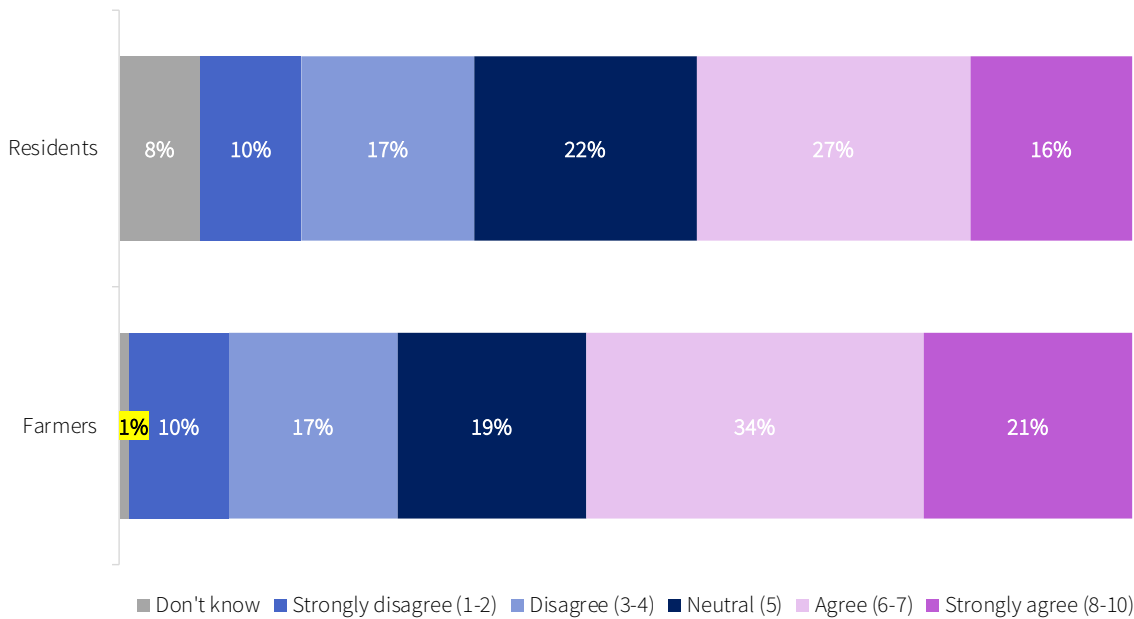
Awareness and Impressions



IMPRESSIONS OF ENVIRONMENT SOUTHLAND: 2019 RESULTS

Forty-three per cent of residents agree (27%) or strongly agree (16%) that Environment Southland is a leader in the development of an environmentally sustainable Southland, a significant decrease compared with last year (cf. 2018, 49%).

Comparatively, 55% of farmers agree (34%) or strongly agree (21%) that Environment Southland is a leader in the development of an environmentally sustainable Southland.



SATISFACTION RATINGS OF IMPRESSIONS OF ENVIRONMENT SOUTHLAND: 2014 - 2019 RESULTS

	2019	2018	2017	2016	2015	2014
Leader in the development of an environmentally sustainable* Southland: Residents	43%	49%	50%	52%	62%	59%
Leader in the development of an environmentally sustainable* Southland: Farmers	55%	61%	64%	49%	59%	54%

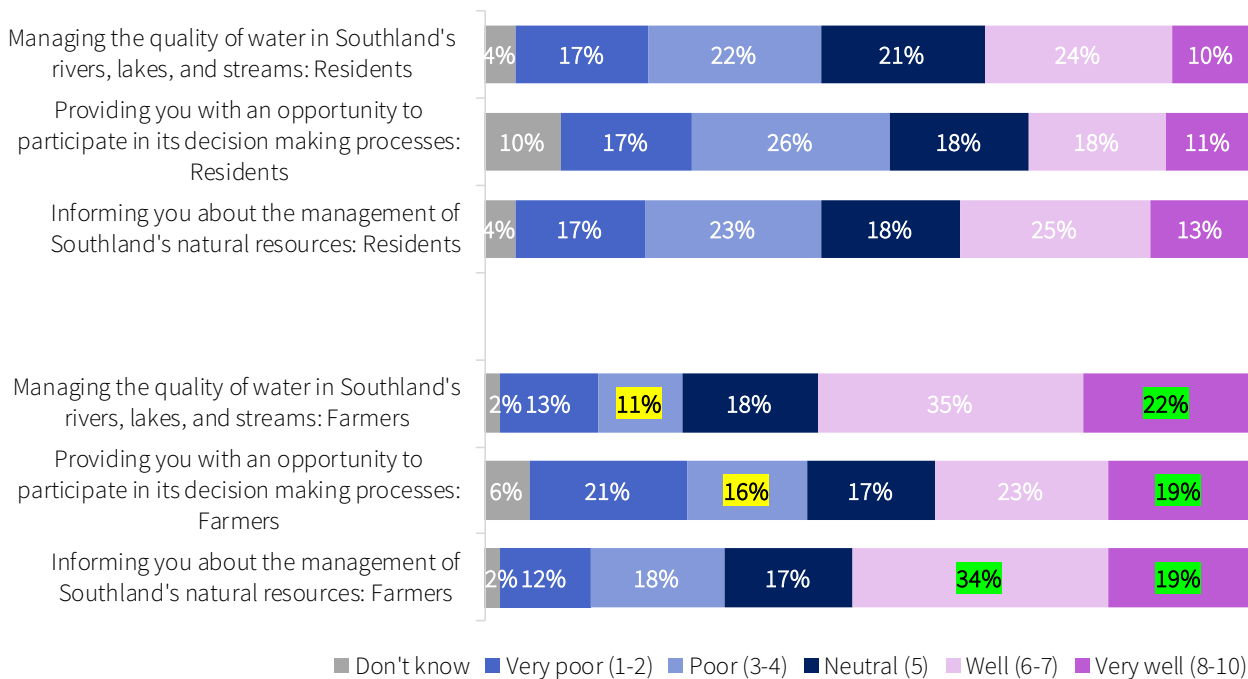
* Wording change in 2019.

Awareness and Impressions



RATINGS OF ENVIRONMENT SOUTHLAND: 2019 RESULTS

Notably, in 2019 farmers are more likely to give positive ratings ('very well') for Environment Southland protecting and managing the quality of water (22%), as well as their opportunity to participate, and being informed about the management of natural resources (both 19%).



SATISFACTION RATINGS OF ENVIRONMENT SOUTHLAND: 2014 - 2019 RESULTS

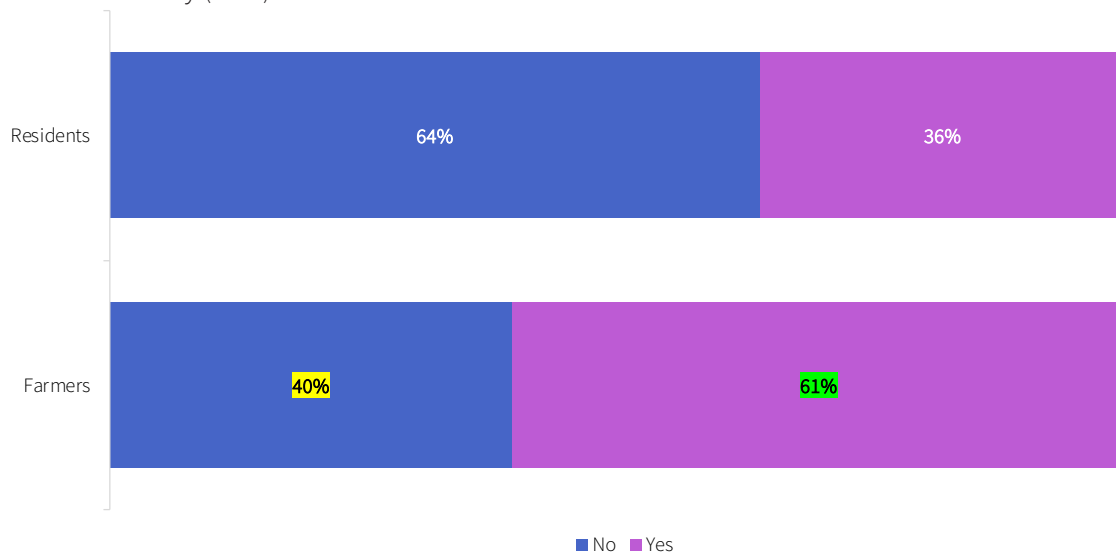
	2019	2018	2017	2016	2015	2014
Managing the quality of water in Southland's rivers, lakes, and streams: Residents	34%	42%	41%	44%	56%	46%
Providing you with an opportunity to participate in its decision making process: Residents	29%	36%	34%	36%	41%	38%
Informing you about the management of Southland's natural resources: Residents	38%	49%	43%	48%	57%	54%
Managing the quality of water in Southland's rivers, lakes, and streams: Farmers	57%	63%	62%	46%	67%	64%
Providing you with an opportunity to participate in its decision making process: Farmers	42%	51%	55%	48%	48%	37%
Informing you about the management of Southland's natural resources: Farmers	53%	59%	59%	61%	59%	56%

Awareness and Impressions



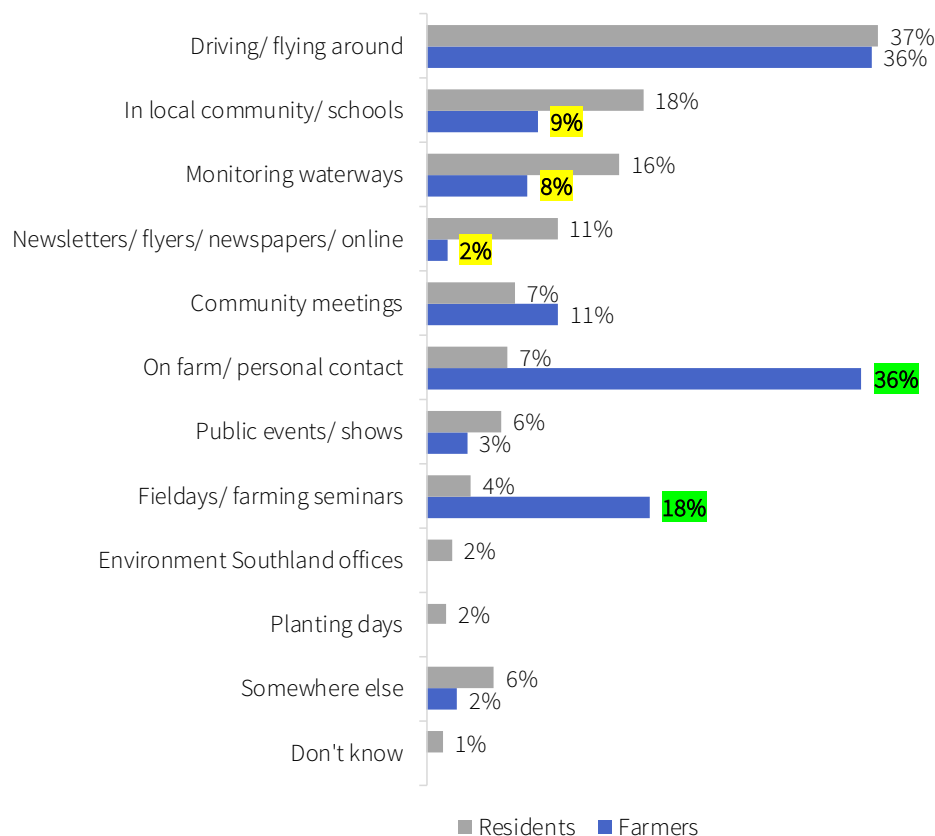
ENVIRONMENT SOUTHLAND IN LOCAL COMMUNITY: 2019 RESULTS

In a new question for 2019, 36% of residents mention they have seen Environment Southland in the local community; comparatively, farmers are more likely to indicate that they have seen Environment Southland in the local community (61%).



ENVIRONMENT SOUTHLAND IN LOCAL COMMUNITY: 2019 RESULTS

Of those residents who have seen Environment Southland in the local community, 37% have seen them driving or flying around (cf. farmers, 36%). Notably, farmers are more likely to mention they have seen Environment Southland on farm or had personal contact with them (36% cf. residents, 7%), and at fielddays or farming seminars (18% cf. residents, 4%).

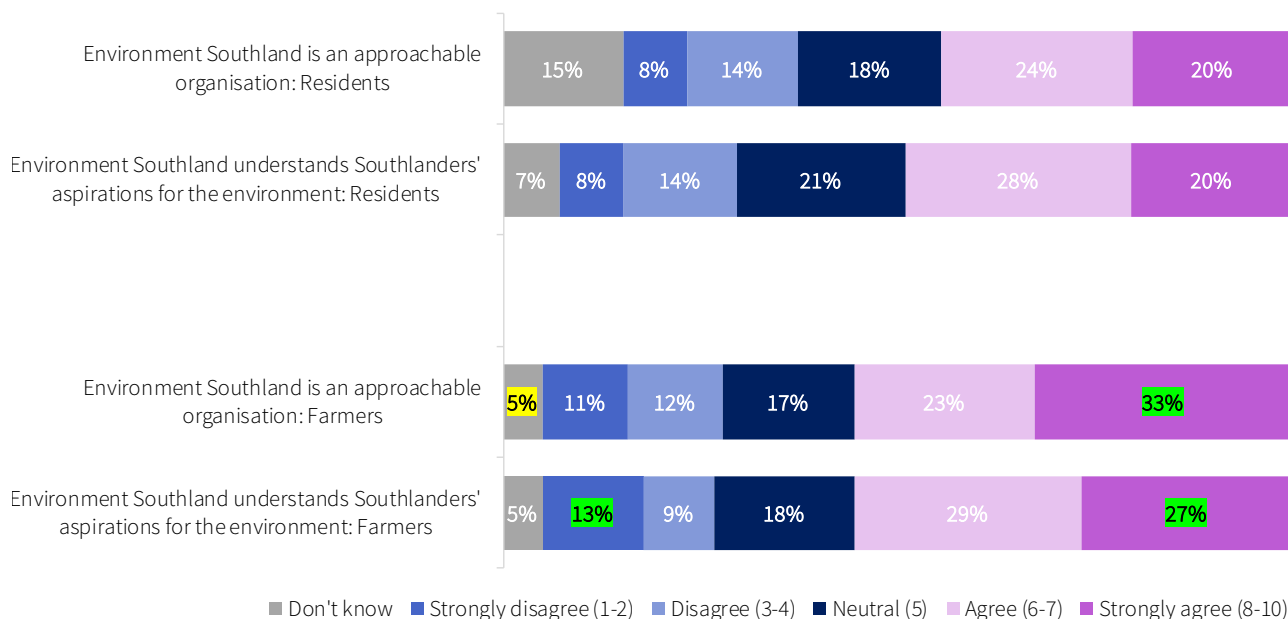


Awareness and Impressions



RATINGS OF ENVIRONMENT SOUTHLAND: 2019 RESULTS

In a new question for 2019, 44% of residents agree (24%) or strongly agree (20%) that Environment Southland is an approachable organisation; comparatively, 56% of farmers agree (23%) or strongly agree (33%) with this. Close to half (48%) of residents agree (28%) or strongly agree (20%) that Environment Southland understands Southlanders' aspirations for the environment, while 56% of farmers agree (29%) or strongly agree (27%) with this. Notably, farmers are more likely to strongly agree that Environment Southland is approachable (33% cf. residents, 20%), and understands Southlanders' aspirations (27% cf. residents, 20%).



SATISFACTION RATINGS OF ENVIRONMENT SOUTHLAND: 2019 RESULTS

	2019
Environment Southland is an approachable organisation: Residents	44%
Environment Southland understands Southlanders' aspirations for the environment: Residents	48%
Environment Southland is an approachable organisation: Farmers	56%
Environment Southland understands Southlanders' aspirations for the environment: Farmers	56%

Subgroup Results

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



GENDER

MALE

No significant differences noted.

FEMALE

No significant differences noted.



AGE

UNDER 39

No significant differences noted.

40 - 59

More likely to be aware of Environment Southland at an unprompted level (90%).

More likely to have seen Environment Southland in local community (49%).

60+

More likely to be aware of Environment Southland at an unprompted level (89%).



AREA

GORE

No significant differences noted.

INVERCARGILL

No significant differences noted.

SOUTHLAND

More likely to be aware of Environment Southland at an unprompted level (87%). More likely to have seen Environment Southland in local community (55%).

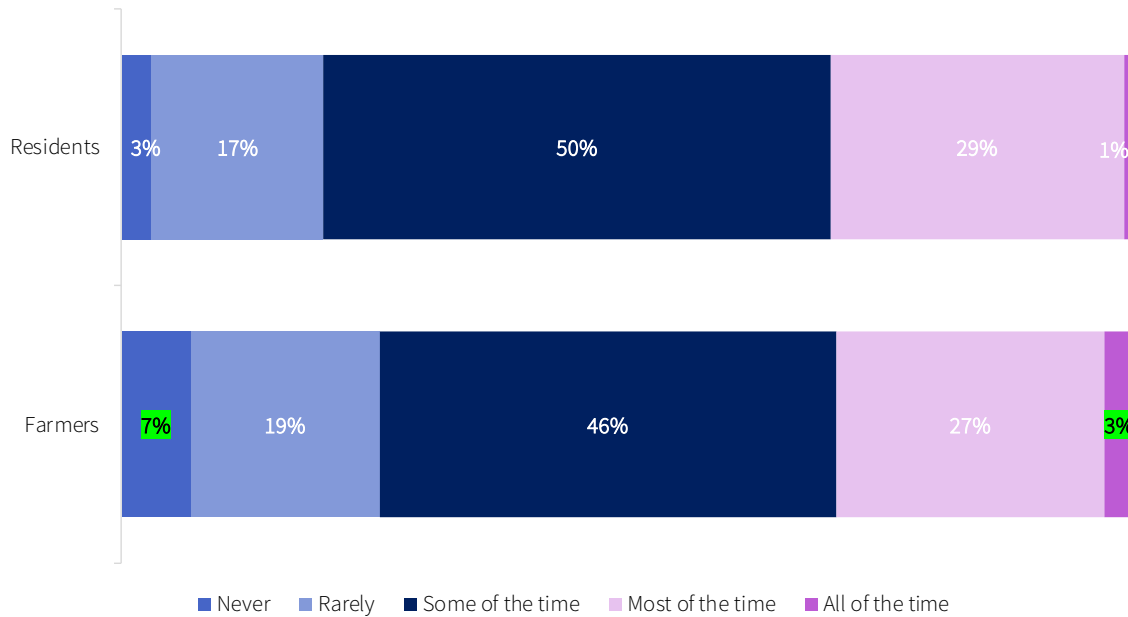
Actions

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 background, with the characters appearing to recede into the distance, creating a sense of depth. Overlapping circles of varying sizes and opacities are scattered across the scene, some appearing as if they are floating or moving through the space.



ENVIRONMENT SOUTHLAND LISTENS TO VIEWS: 2019 RESULTS

In a new question for 2019, close to a third of residents (30%) mention Environment Southland listens to the community's views most of the time (29%) or all of the time (1%). Thirty per cent of farmers also indicate Environment Southland listens to the community's views most of the time (27%) or all of the time (3%). Notably, farmers are more likely to mention Environment Southland listens to the community's views all of the time (3% cf. residents, 1%), or never (7% cf. residents, 3%).



SATISFACTION RATINGS OF ENVIRONMENT SOUTHLAND LISTENS TO VIEWS: 2019 RESULTS

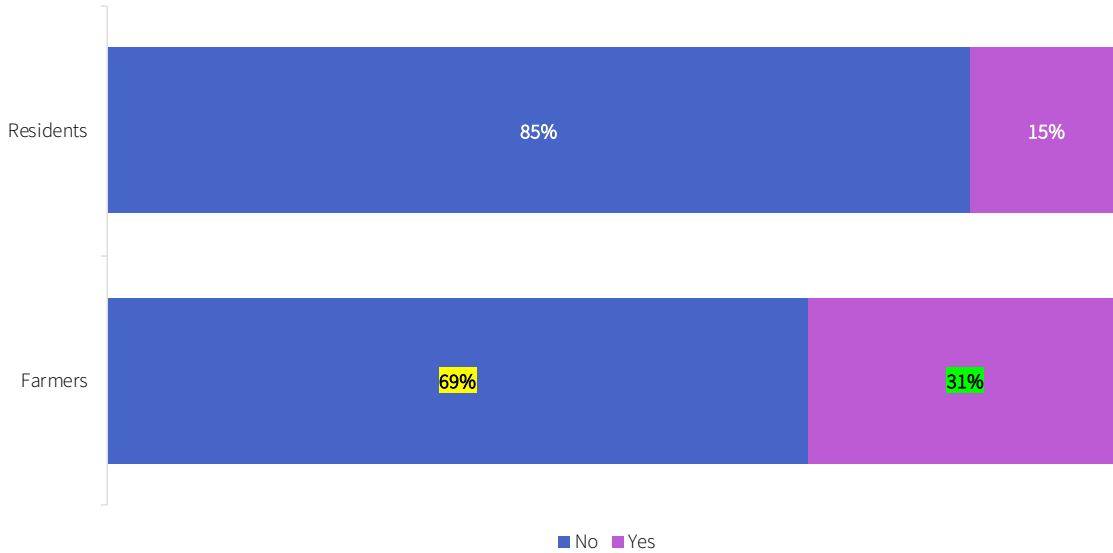
	2019
Environment Southland listens to views (most and all of the time): Residents	30%
Environment Southland listens to views (most and all of the time): Farmers	30%

Actions



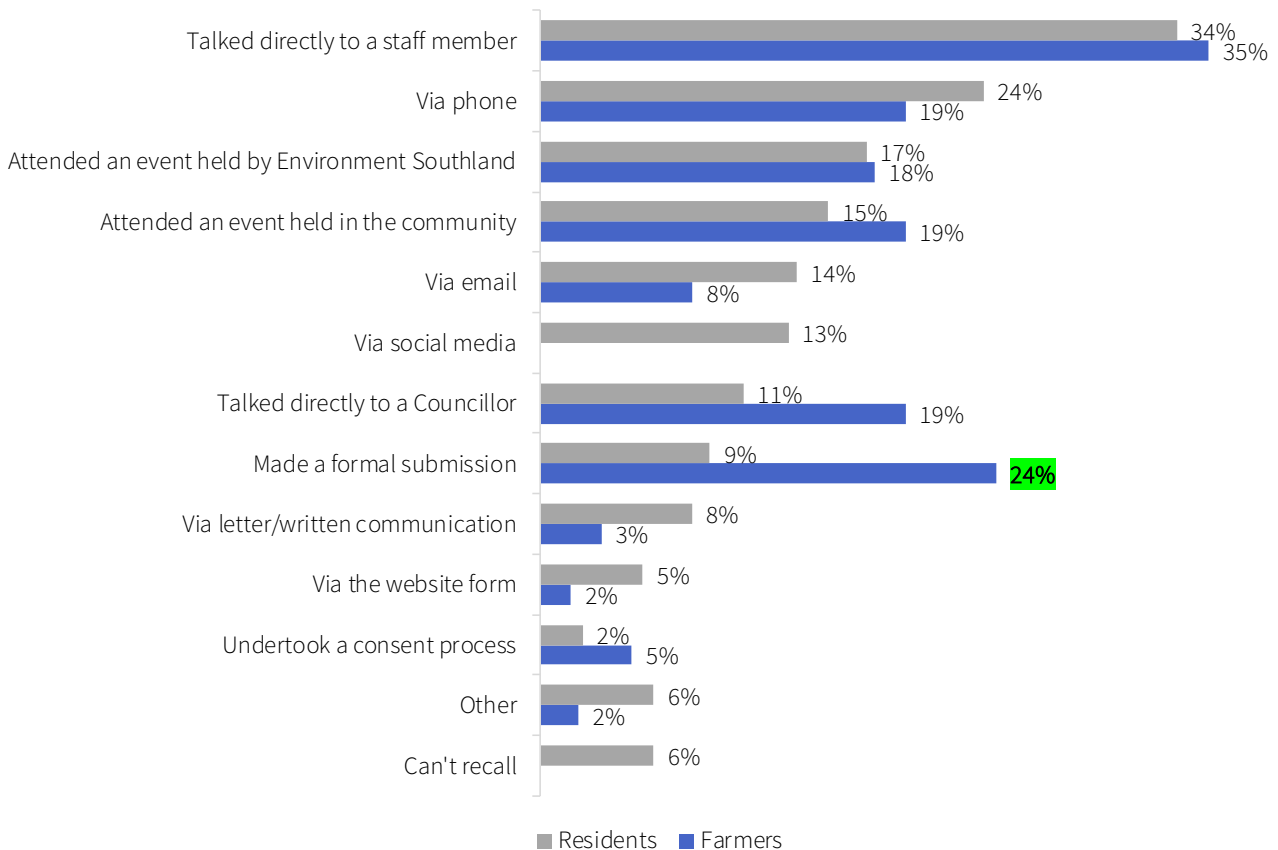
PROVIDED VIEWS TO ENVIRONMENT SOUTHLAND: 2019 RESULTS

In a new question for 2019, 15% of residents provided their views to Environment Southland; comparatively, farmers are more likely to mention that they provided their views to Environment Southland (31%).



HOW RESPONDENTS EXPRESSED VIEWS: 2019 RESULTS

When asked how they expressed their views, 34% of residents, and 35% of farmers indicate that they talked directly to an Environment Southland staff member. Notably, farmers are more likely to mention that they made a formal submission (24% cf. residents, 9%).

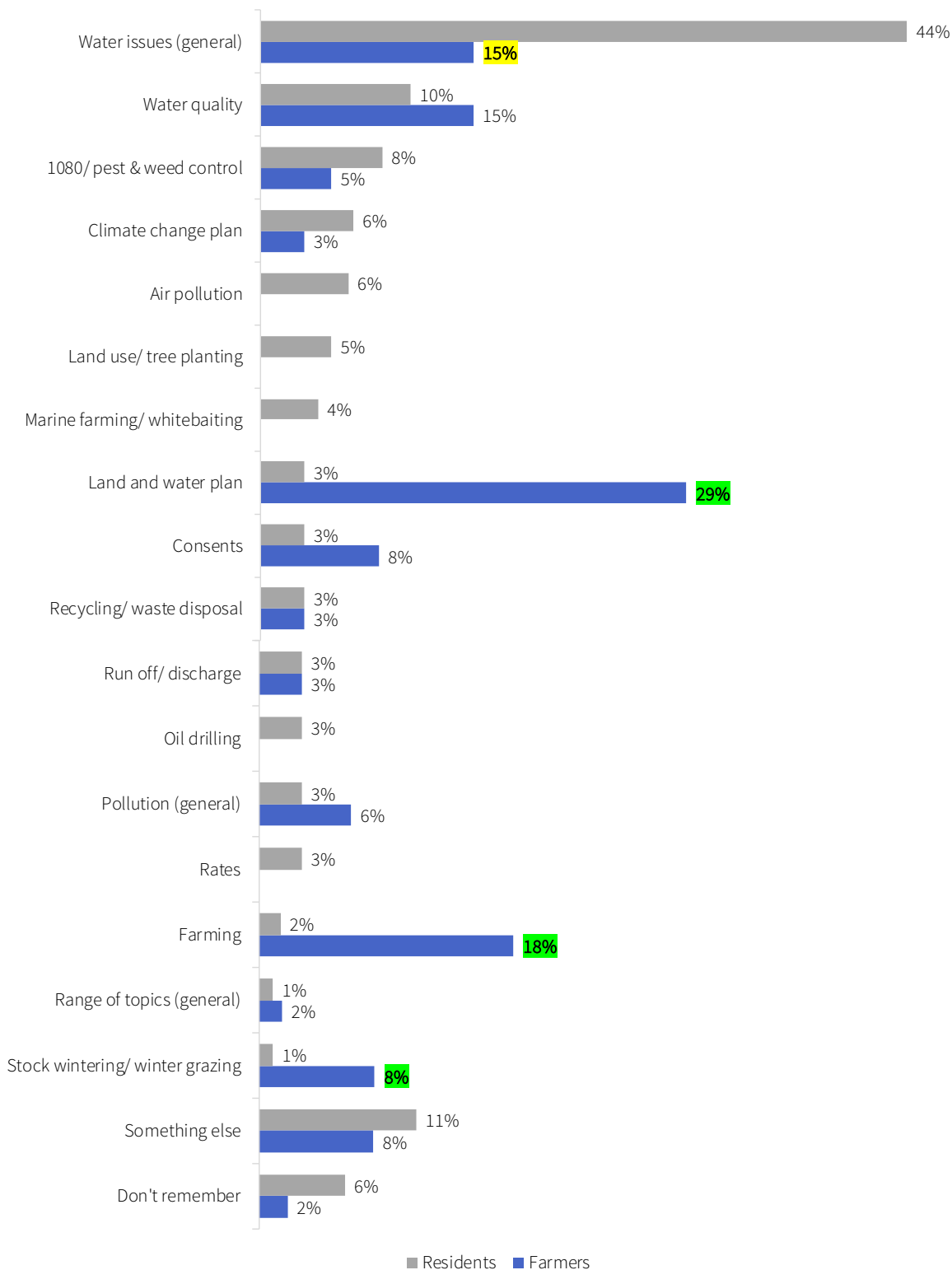


Actions



TOPIC EXPRESSED VIEWS ABOUT: 2019 RESULTS

With regards to the topics respondents provided views about; the primary mention for residents is water issues (44%). Farmers are less likely to mention water issues (15%), however, they are more likely to mention the land and water plan (29% cf. residents, 3%), farming issues (18% cf. residents, 2%), and stock wintering or winter grazing (8% cf. residents, 1%).

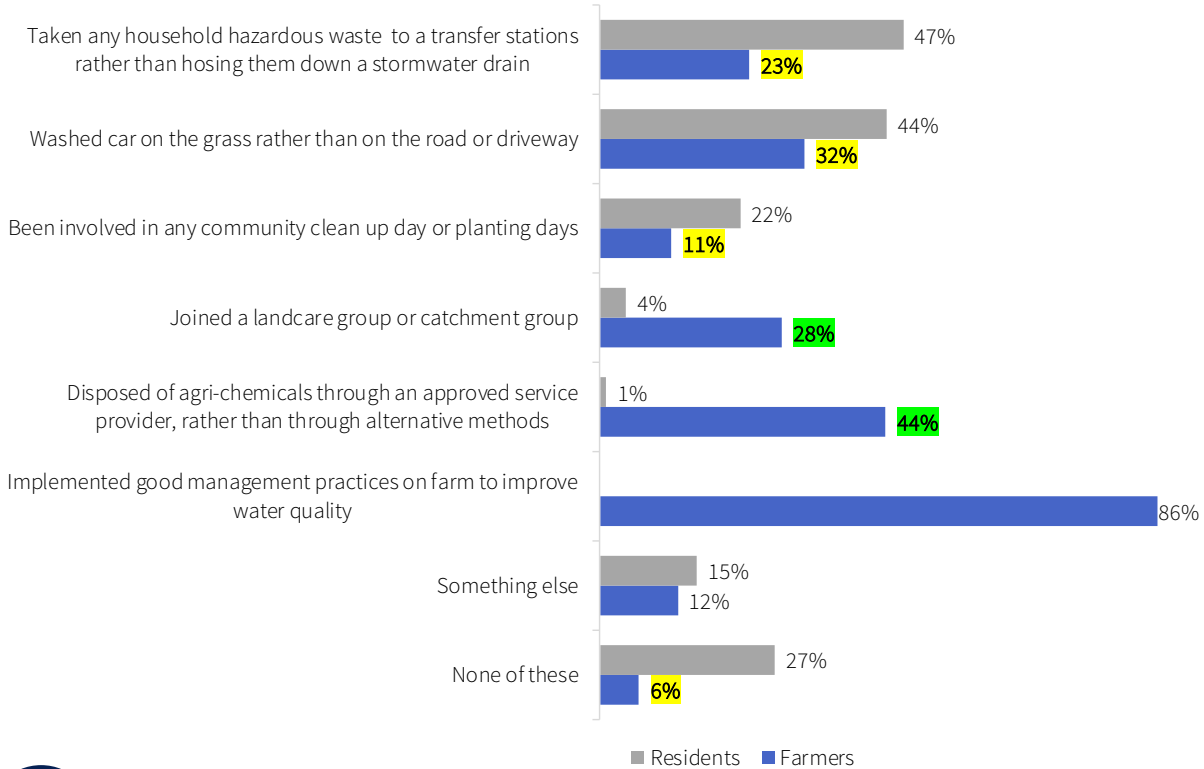


Actions



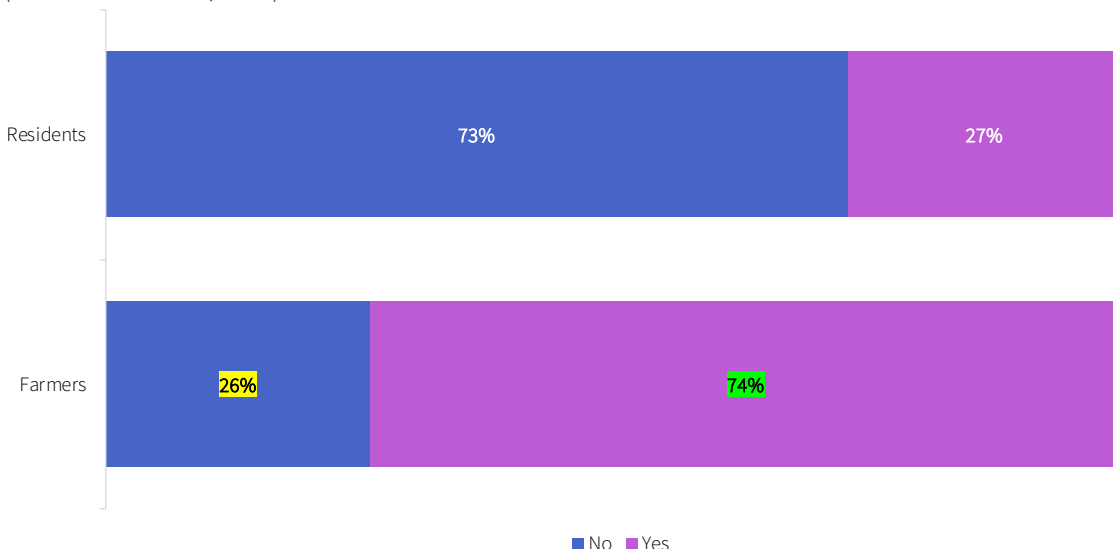
ACTIONS UNDERTAKEN IN LAST 12 MONTHS: 2019 RESULTS

In a new question for 2019, respondents were asked which actions they had undertaken in the last 12 months. The primary mentions for residents are taking household hazardous waste to a transfer station (47%), washing the car on the grass (44%), and being involved in any community clean up or planting days (22%). Interestingly, farmers are less likely to have undertaken these actions (23%, 32%, and 11% respectively), however, they are most likely to have joined a landcare or catchment group (28% cf. residents, 4%), and disposed of agri-chemicals through an approved service provider (44% cf. residents, 1%).



IMPROVED WATER QUALITY IN LAST 12 MONTHS: 2019 RESULTS

In a new question for 2019, respondents were asked if they had personally taken any actions, or been involved in any activities, to try and improve water quality in the region in the last 12 months. Twenty-seven per cent of residents indicate that they had; notably, farmers are significantly more likely to mention that they had (74% cf. residents, 27%).

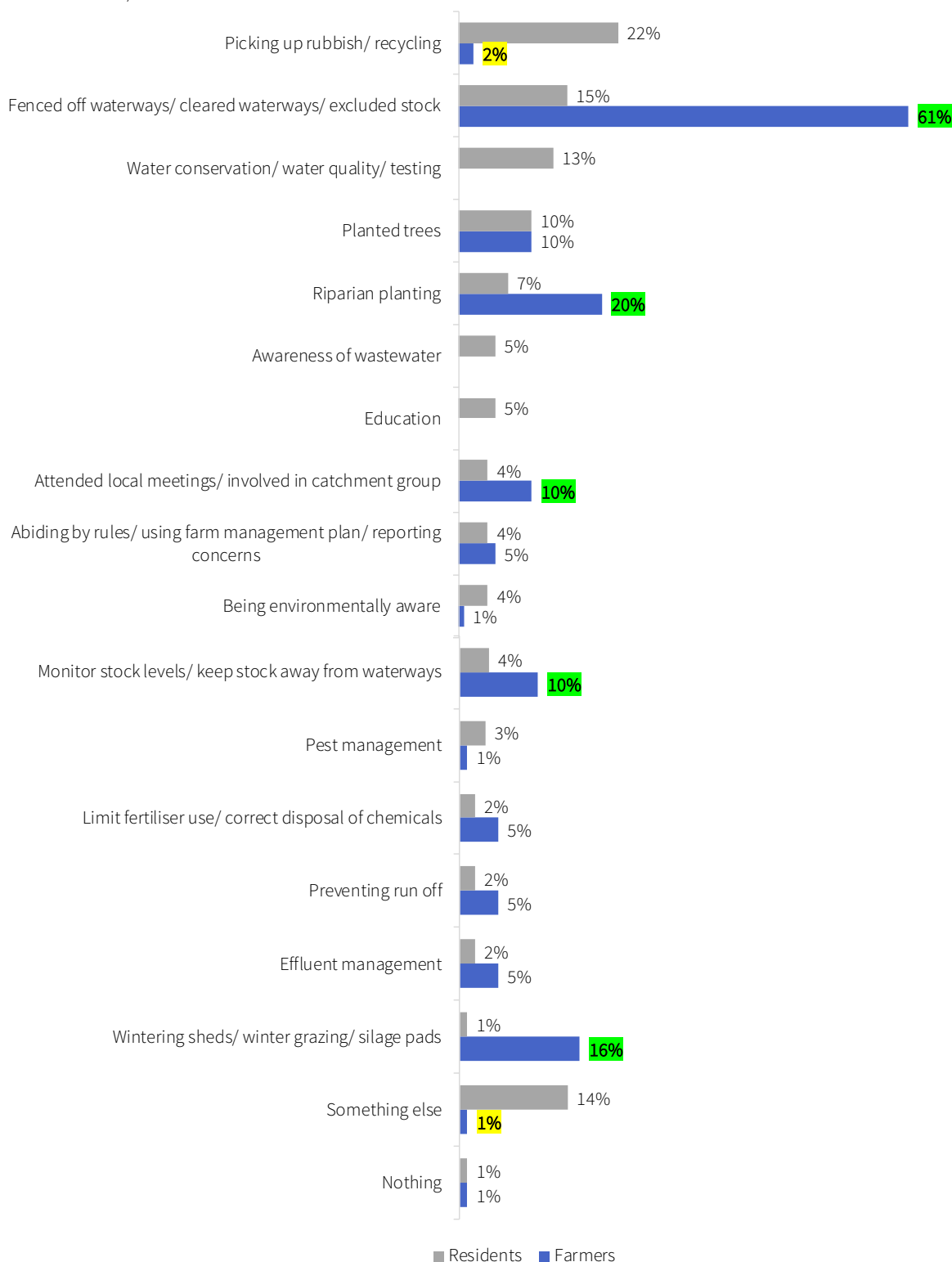


■ No ■ Yes



ACTIONS TAKEN TO IMPROVE WATER QUALITY: 2019 RESULTS

Respondents were asked what actions were taken to improve water quality. This was asked verbatim, and post-coded by theme. The primary action undertaken by residents is picking up rubbish or recycling (22%). Notably, farmers are less likely to mention this (2%), however, are more likely to mention that they fenced off or cleared waterways or excluded stock (61% cf. residents 15%), did riparian planting (20% cf. residents, 7%), attended local meetings or was involved in a catchment group (10% cf. residents, 4%), monitored stock levels or kept stock away from waterways (10% cf. residents, 4%), and used wintering sheds, winter grazing or silage pads (16% cf. residents 1%).



Subgroup Results

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



GENDER

MALE

More likely to have provided views to Environment Southland (23%).
More likely to have improved water quality in the last 12 months (46%).

FEMALE

No significant differences noted.



AGE

UNDER 39

No significant differences noted.

40 - 59

More likely to have joined a landcare group or catchment group (15%), and disposed of agri-chemicals (27%).

60+

No significant differences noted.



AREA

GORE

No significant differences noted.

INVERCARGILL

No significant differences noted.

SOUTHLAND

More likely to have provided views to Environment Southland (26%).



Southland's Priorities

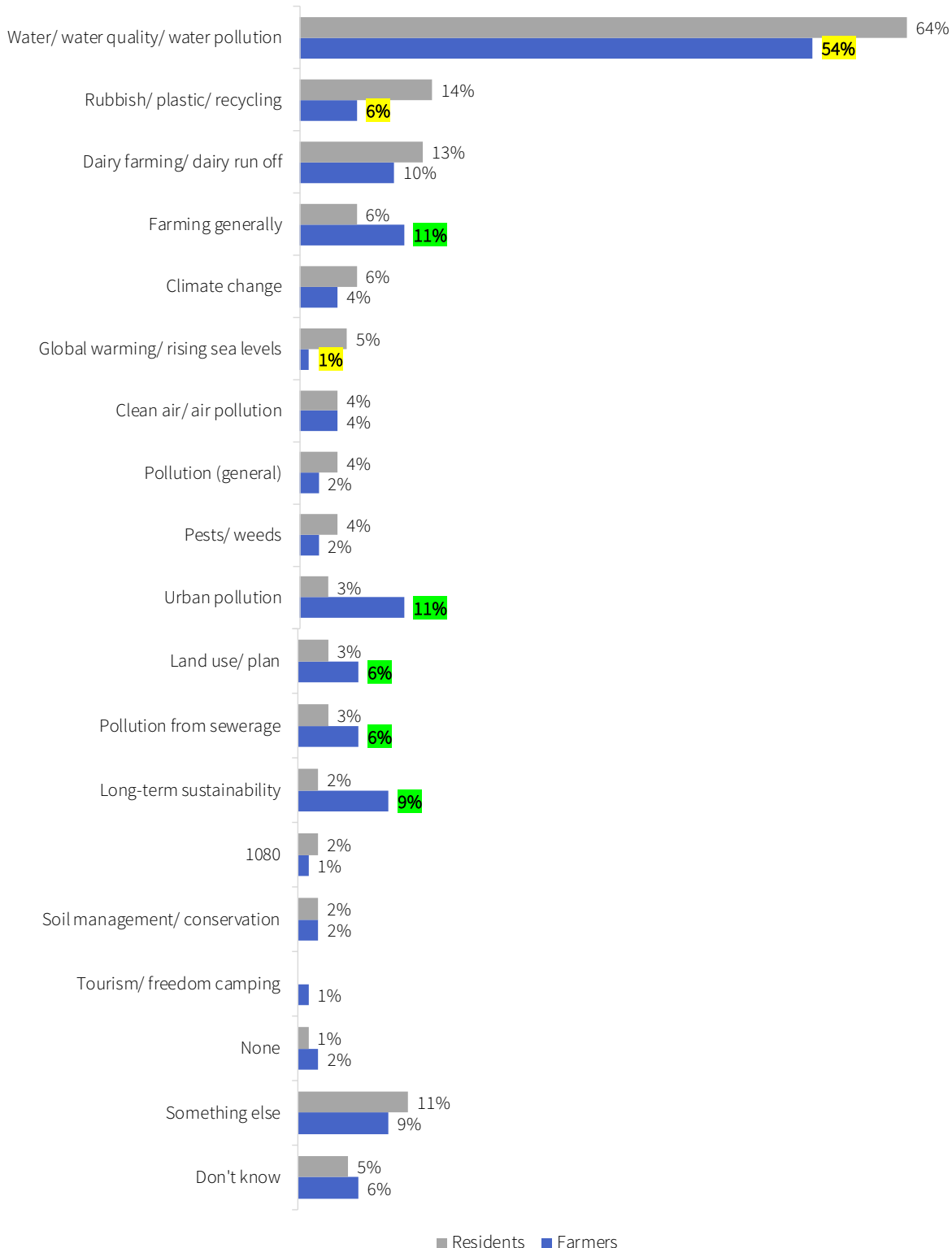
Southland's Priorities



SOUTHLAND'S PRIORITIES: 2019 RESULTS

Respondents were asked what they think the most important issues facing Southland are. These responses were recorded verbatim and post-coded by theme.

Water is the primary mention made by both residents (64%) and farmers (54%). Notably, farmers are less likely to mention rubbish/plastic/recycling (6% cf. residents, 14%), and global warming or rising sea levels (14% cf. residents, 6%), and more likely to mention farming generally (11% cf. residents, 6%), urban pollution (11% cf. residents, 3%), land use or plan (6% cf. residents, 3%), pollution from sewerage (6% cf. residents, 3%), and long-term sustainability (9% cf. residents, 2%).



Southland's Priorities



SOUTHLAND'S PRIORITIES: TOP FIVE; 2017 - 2019 RESULTS

In 2019, residents are more likely to mention farming generally as an issue (6% cf. 2018, 2%). Farmers are also more likely to indicate farming generally as an issue (11% cf. 2018, 3%), as well as urban pollution (11% cf. 2018, 4%), and long-term sustainability (9% cf. 2018, 3%).

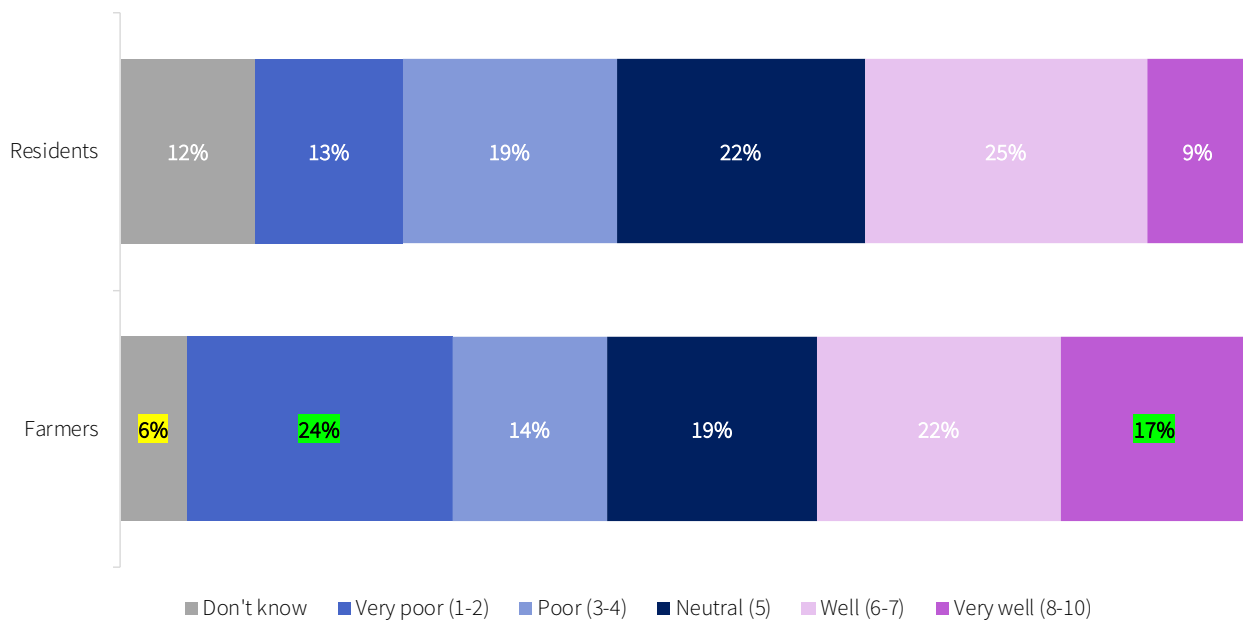
	2019	2018	2017
Water/ water quality/ water pollution: Residents	64%	61%	67%
Rubbish/ plastic/ recycling: Residents	14%	13%	6%
Dairy farming/ dairy run off: Residents	13%	12%	7%
Farming generally: Residents	6%	2%	3%
Climate change: Residents	6%	-	-
Something else: Residents	11%	4%	2%
Don't know/ not sure: Residents	5%	2%	1%
Farmers			
Water/ water quality/ water pollution: Farmers	54%	59%	67%
Farming generally: Farmers	11%	3%	3%
Urban pollution: Farmers	11%	4%	-
Dairy farming/ dairy run off: Farmers	10%	14%	14%
Long-term sustainability	9%	3%	-
Something else: Farmers	9%	8%	7%
Don't know/ not sure: Farmers	6%	1%	1%

Southland's Priorities



RESPONSE TO PRIORITIES: 2019 RESULTS

When asked about Environment Southland's response to the issues mentioned prior, farmers are more positive about Environment Southland's response. Thirty-four per cent of residents rate Environment Southland as doing well (25%) or very well (9%) in response to these, and 39% of farmers rate them as doing well (22%) or very well (17%) in response to these issues. A higher proportion of farmers than residents rate Environment Southland's response to the issues mentioned very poorly (24% cf. residents, 13%), and very well (17% cf. residents, 9%).



SATISFACTION RATINGS FOR RESPONSE TO PRIORITIES: 2018 - 2019 RESULTS

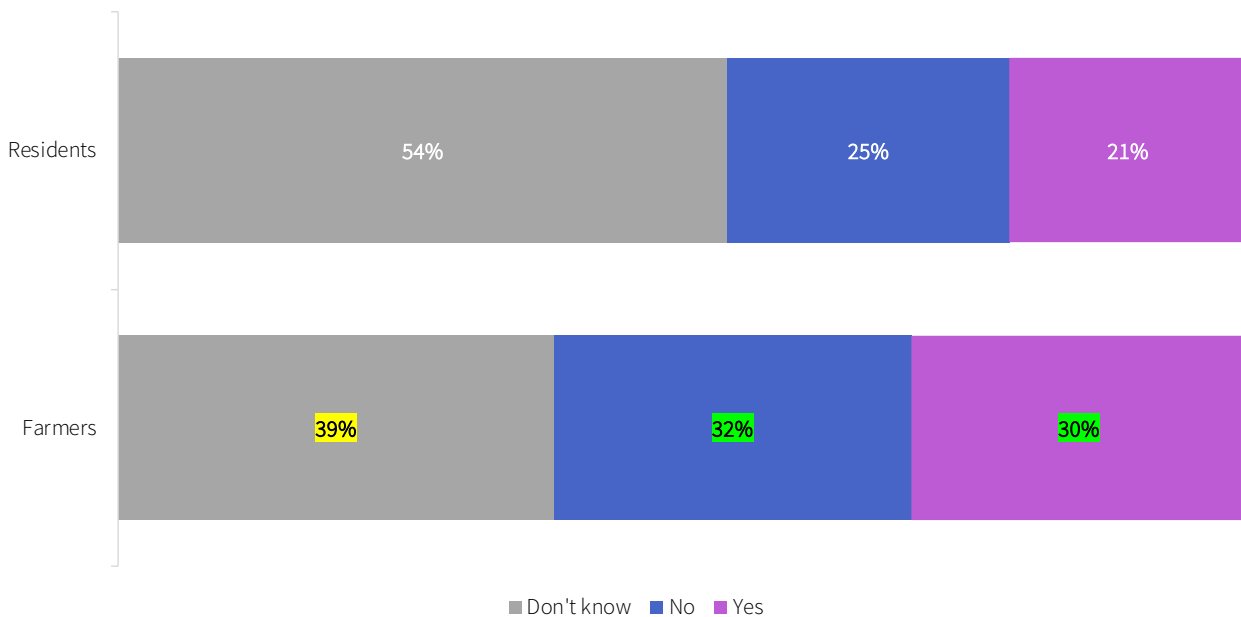
	2019	2018
Response to priorities (well or very well): Residents	34%	30%
Response to priorities (well or very well): Farmers	39%	54%

Southland's Priorities



ENVIRONMENT SOUTHLAND DOING A BETTER JOB THAN LAST YEAR: 2019 RESULTS

Twenty-one per cent of residents think Environment Southland is doing a better job than last year. This is on par with last year's result. A further 25% indicate that Environment Southland is not doing a better job than last year, while 54% of residents are unsure. Amongst farmers, 30% mention Environment Southland is doing a better job than last year. This is significantly higher than the residents' results, however, significantly lower compared with last year (30% cf. 2018, 40%).



ENVIRONMENT SOUTHLAND DOING A BETTER JOB THAN LAST YEAR: 2017 - 2019 RESULTS

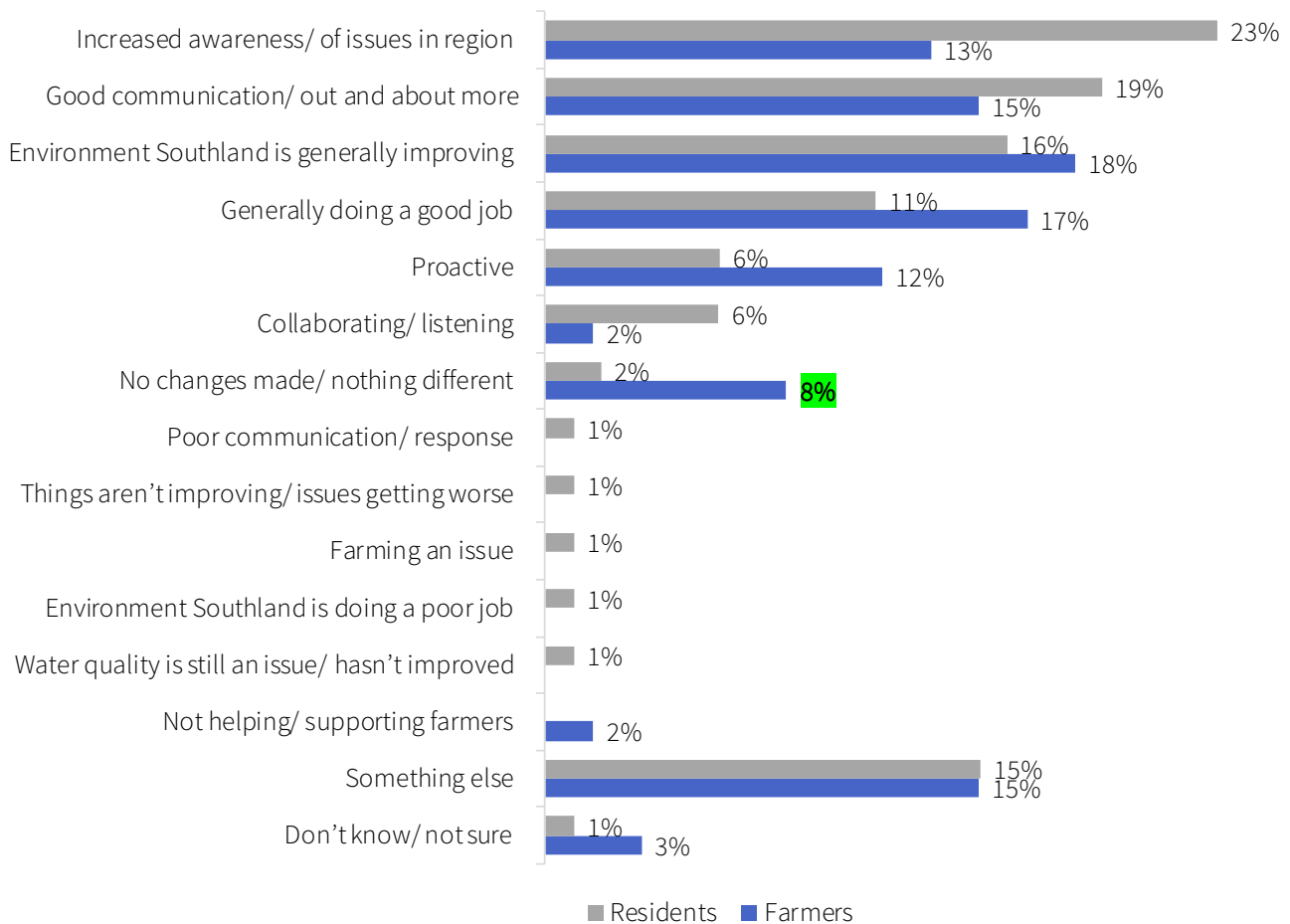
	2019	2018	2017
Better than last year: Residents	21%	21%	21%
Better than last year: Farmers	30%	40%	38%

Southland's Priorities



REASONS FOR 'BETTER' JOB RATING: 2019 RESULTS

The primary reasons for mentioning Environment Southland is doing a better job than last year relate to: increased awareness (residents: 23%, farmers 13%), good communication (residents: 19%, farmers: 15%), Environment Southland is generally improving (residents: 16%, farmers: 18%), Environment Southland is generally doing a good job (residents: 11%, farmers: 17%), and Environment Southland is being proactive (residents: 6%, farmers: 12%). Notably, farmers are significantly more likely to mention that there are no changes made or nothing is different (8% cf. residents, 2%).



Southland's Priorities



REASONS FOR 'BETTER' JOB RATING: TOP FIVE; 2017 - 2019 RESULTS

Compared to last year's results, residents are less likely to indicate that Environment Southland being proactive as a reason for stating Environment Southland is doing a better job than last year (6% cf. 2018, 17%). This year, farmers are less likely to mention good communication or Environment Southland being out and about more as a reason for Environment Southland doing a better job than last year (15% cf. 2018, 32%).

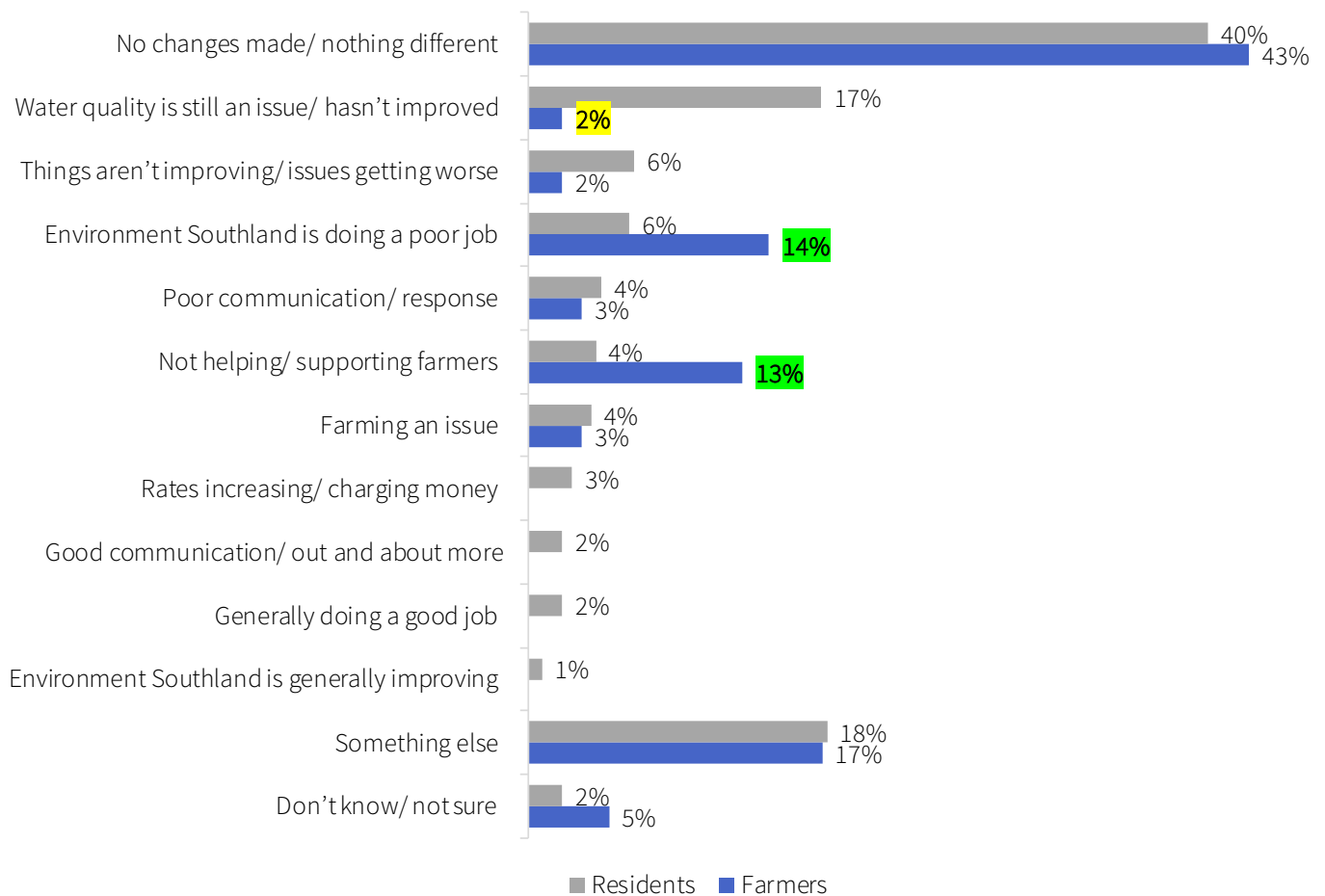
	2019	2018	2017
Increased awareness/ of issues in region: Residents	23%	14%	10%
Good communication/ out and about more: Residents	19%	23%	20%
Environment Southland is generally improving: Residents	16%	19%	11%
Generally doing a good job: Residents	11%	12%	8%
Proactive: Residents	6%	17%	5%
Something else: Residents	15%	6%	-
Don't know/ not sure: Residents	1%	4%	11%
Environment Southland is generally improving: Farmers			
Environment Southland is generally improving: Farmers	18%	16%	9%
Generally doing a good job: Farmers	17%	22%	9%
Good communication/ out and about more: Farmers	15%	32%	21%
Increased awareness/ of issues in region: Farmers	13%	5%	4%
Proactive: Farmers	12%	11%	1%
Something else: Farmers	15%	6%	-
Don't know/ not sure: Farmers	3%	1%	3%

Southland's Priorities



REASONS FOR 'NOT BETTER' JOB RATING: 2019 RESULTS

The primary reasons for residents mentioning that Environment Southland is not doing a better job than last year relate to: no changes being made or nothing is different (40%) and water quality still being an issue (17%). Likewise, farmers indicate the main reason for this rating relates to no changes being made or nothing is different (43%). Notably, farmers are less likely to mention that water quality is still an issue (2% cf. residents, 17%), and more likely to mention Environment Southland is doing a poor job (14% cf. residents, 6%), and not helping or supporting farmers (13% cf. residents, 4%).



Southland's Priorities



REASONS FOR 'NOT BETTER' JOB RATING: TOP FIVE; 2017 - 2019 RESULTS

Regarding reasons for Environment Southland not doing a better job than last year, 40% of residents, and 43% of farmers state no changes have been made or nothing is different. There are no significant differences noted compared with last year, however 13% of farmers mention that Environment Southland is not helping or supporting farmers, a 6% increase compared with last year.

	2019	2018	2017
No changes made/ nothing different: Residents	40%	39%	25%
Water quality is still an issue/ hasn't improved: Residents	17%	22%	30%
Things aren't improving/ issues getting worse: Residents	6%	8%	3%
Environment Southland is doing a poor job: Residents	6%	7%	12%
Poor communication/ response: Residents	4%	4%	6%
Something else: Residents	18%	12%	-
Don't know/ not sure: Residents	2%	3%	-
Farmers			
No changes made/ nothing different: Farmers	43%	34%	40%
Environment Southland is doing a poor job: Farmers	14%	14%	4%
Not helping/ supporting farmers: Farmers	13%	7%	16%
Poor communication/ response: Farmers	3%	4%	4%
Farming an issue: Farmers	3%	0%	2%
Something else: Farmers	17%	21%	-
Don't know/ not sure: Farmers	5%	0%	-

Subgroup Results

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



GENDER

MALE

More likely to think that Environment Southland is not doing a better job than last year (31%).

FEMALE

More likely to be unsure if Environment Southland is doing a better job than last year (58%).



AGE

UNDER 39

More likely to think rubbish, plastic or recycling (21%) is the most important environmental issue facing Southland today.

40 - 59

No significant differences noted.

60+

No significant differences noted.



AREA

GORE

No significant differences noted.

INVERCARGILL

No significant differences noted.

SOUTHLAND

More likely to think that Environment Southland is doing a better job than last year (29%).

Communication

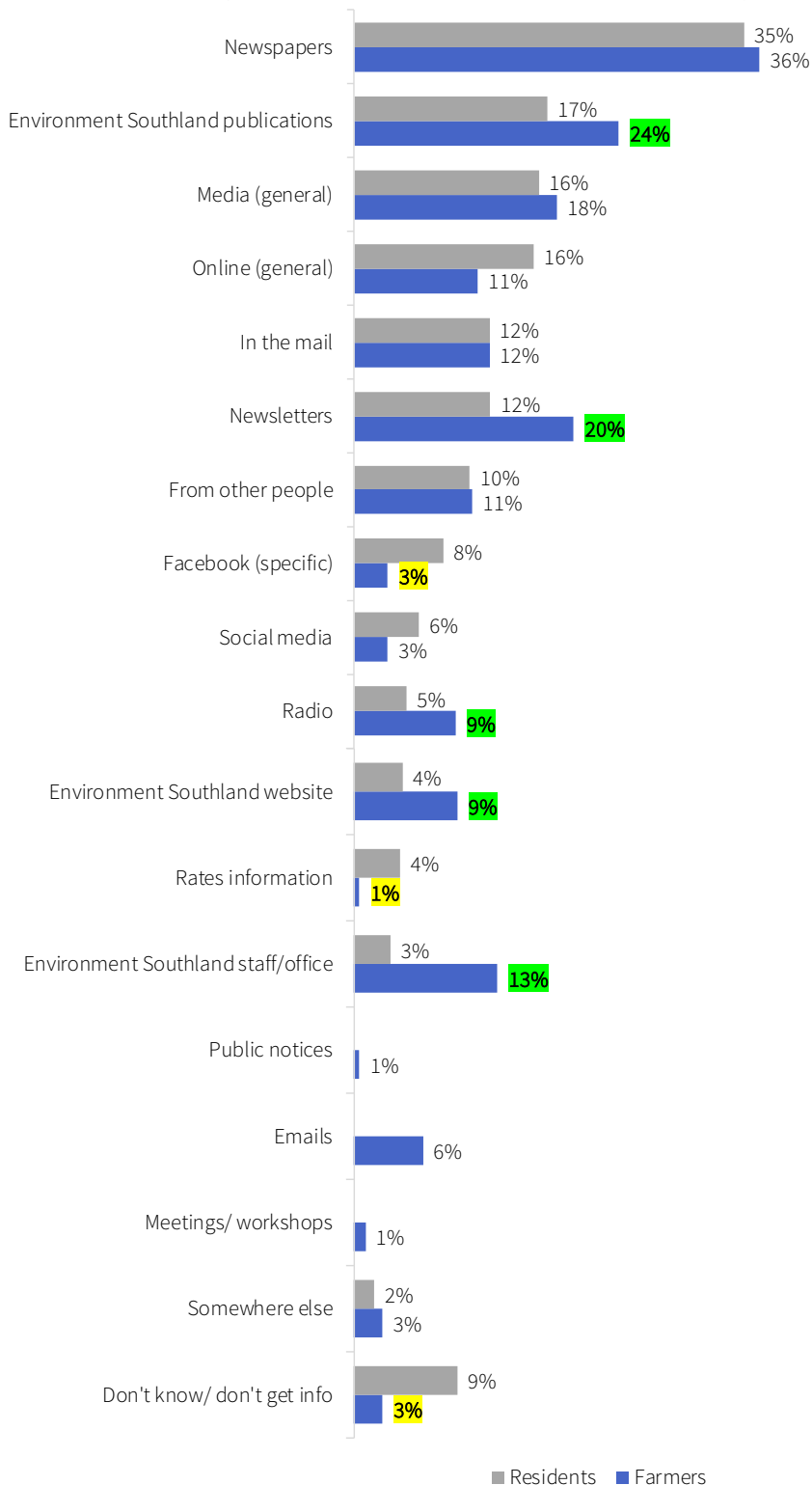
The background features a vertical gradient from purple at the top to blue at the bottom. A pattern of binary code (0s and 1s) is overlaid on the background, with the characters appearing to recede into the distance, creating a sense of depth. Overlapping circles of varying sizes are scattered across the scene, some appearing as if they are floating or moving through the space.

Communication



SOURCING INFORMATION ABOUT ENVIRONMENT SOUTHLAND: 2019 RESULTS

The primary sources of information about Environment Southland are from newspapers (residents: 35%, farmers: 36%), Environment Southland publications (residents: 17%, farmers: 24%), and generally in the media (residents: 16%, farmers: 18%). Notably, farmers are less likely to gather information about Environment Southland through Facebook (3% cf. residents, 8%), and rates information (1% cf. residents, 4%), however, they are more likely to source information about Environment Southland through its publications (24% cf. residents, 17%), newsletters (20% cf. residents, 12%), the radio (9% cf. residents, 5%), Environment Southland’s website (9% cf. residents, 4%), and Environment Southland staff or offices (13% cf. residents, 3%).



Communication



SOURCING INFORMATION ABOUT ENVIRONMENT SOUTHLAND: TOP FIVE; 2014 - 2019 RESULTS

Newspapers continue to be the primary platform for where respondents source information about Environment Southland (residents: 35%, farmers: 36%), however there is a significant decrease in residents mentioning this compared with last year (35% cf. 2018, 59%).

	2019	2018	2017	2016	2015	2014
Newspapers: Residents	35%	59%	53%	43%	58%	61%
Environment Southland publications: Residents	17%	35%	27%	27%	33%	18%
Media (general): Residents	16%	-	-	-	-	-
Online (general): Residents	16%	28%	13%	12%	6%	11%
In the mail: Residents	12%	31%	16%	29%	24%	29%
Something else: Residents	2%	1%	5%	3%	1%	-
Don't know/ don't get info: Residents	9%	1%	6%	5%	2%	2%
Farmers						
Newspapers: Farmers	36%	42%	45%	42%	56%	48%
Environment Southland publications: Farmers	24%	27%	32%	26%	44%	24%
Newsletters: Farmers	20%	-	-	-	-	-
Media (general): Farmers	18%	-	-	-	-	-
Environment Southland staff/ office: Farmers	13%	9%	4%	7%	14%	7%
Something else: Farmers	3%	6%	2%	9%	4%	4%
Don't know/ don't get info: Farmers	3%	3%	2%	3%	4%	3%

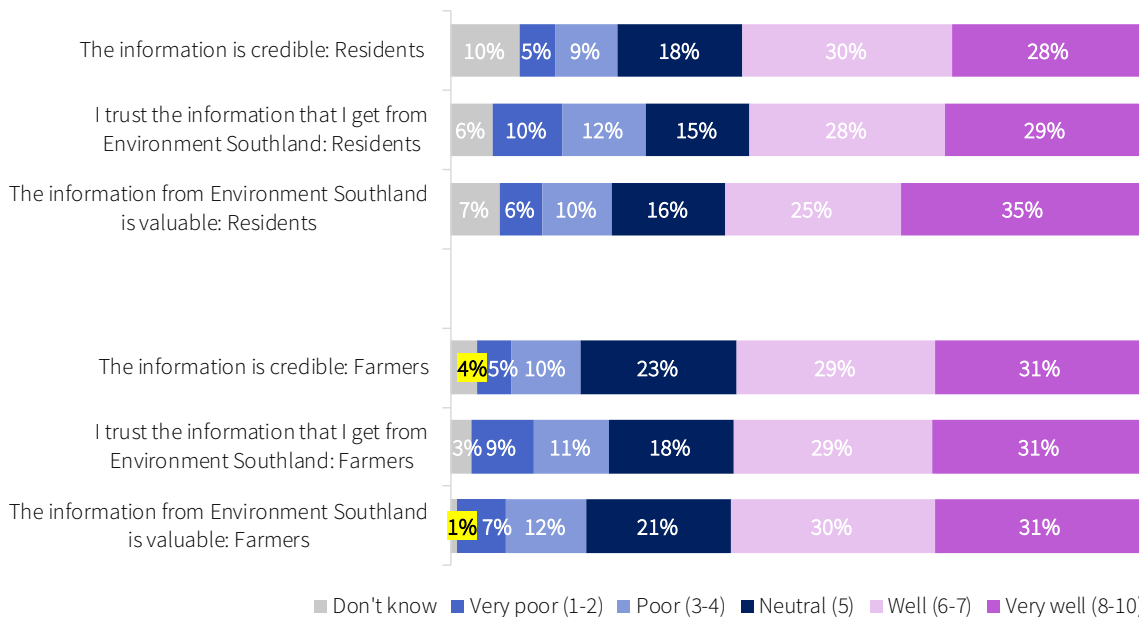
Wording change to some code frames in 2019

Communication



INFORMATION ENVIRONMENT SOUTHLAND PROVIDES THE COMMUNITY: 2019 RESULTS

In 2019, 58% of residents agree (30%) or strongly agree (28%) that the information Environment Southland provides is credible; comparatively 60% of farmers rate this positively. A further 57% of residents agree (28%) or strongly agree (29%) that they trust the information from Environment Southland, while 60% of farmers rate this positively. Regarding the information from Environment Southland being valuable, 60% (each) of residents and farmers rate this positively. There have been decreases across all measures compared with last year's results.



SATISFACTION RATINGS FOR INFORMATION ENVIRONMENT SOUTHLAND PROVIDES THE COMMUNITY: 2014 - 2019 RESULTS

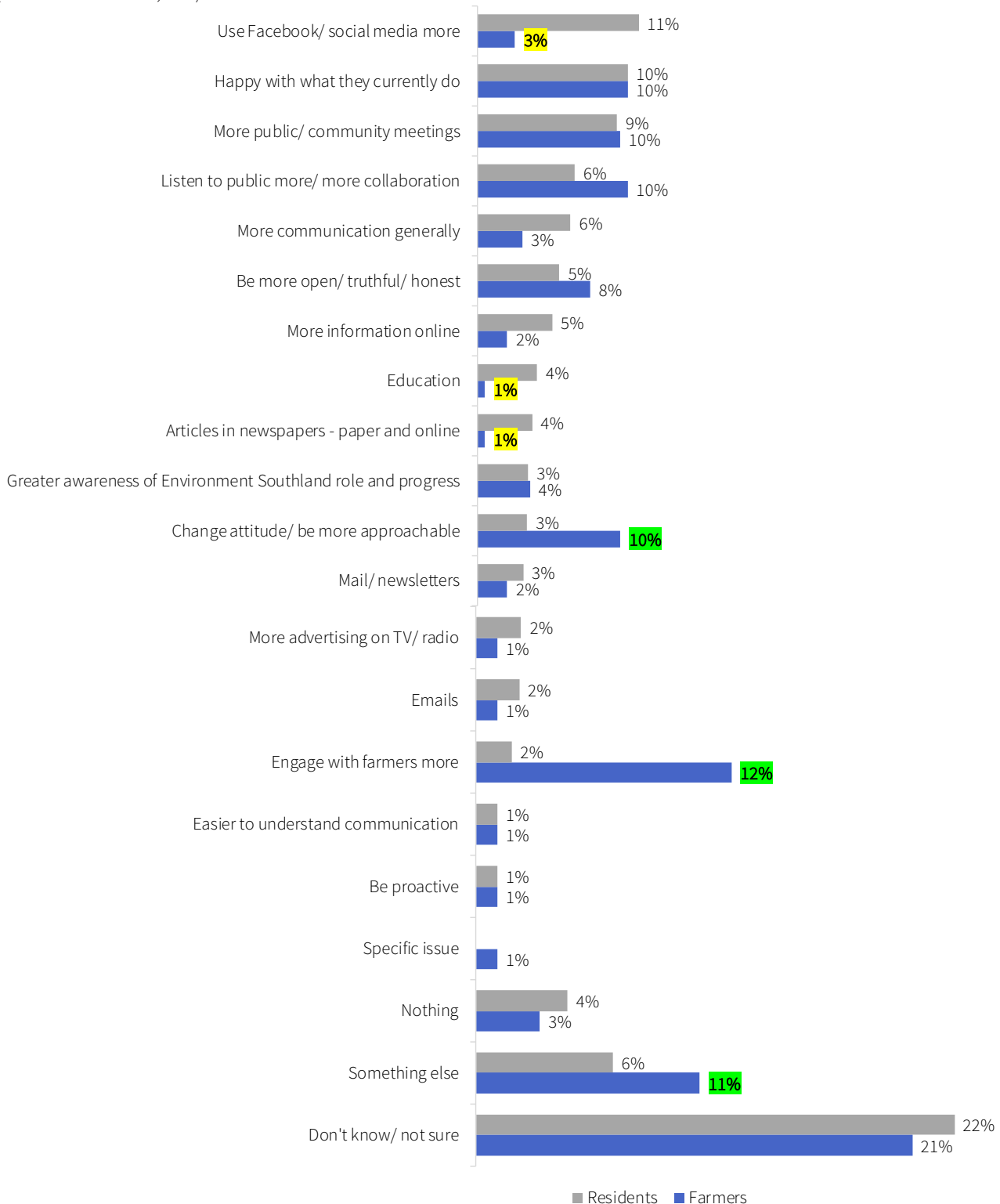
	2019	2018	2017	2016	2015	2014
The information is credible: Residents	58%	64%	64%	60%	73%	70%
I trust the information that I get from Environment Southland: Residents	57%	64%	64%	61%	71%	68%
The information from Environment Southland is valuable: Residents	60%	70%	67%	66%	78%	76%
The information is credible: Farmers	60%	72%	70%	63%	68%	66%
I trust the information that I get from Environment Southland: Farmers	60%	69%	73%	57%	63%	65%
The information from Environment Southland is valuable: Farmers	61%	76%	75%	66%	74%	76%

Communication



HOW ENVIRONMENT SOUTHLAND CAN IMPROVE COMMUNICATION: 2019 RESULTS

Regarding how Environment Southland can improve communication, the primary mentions are: use Facebook or social media more (residents: 11%, farmers: 3%), being generally happy with what they currently do (residents: 10%, farmers: 10%), and having more public or community meetings (residents: 9%, farmers: 10%). Farmers are less likely to mention using Facebook or social media more (3% cf. residents, 11%), education (1% cf. residents, 4%), and articles in newspapers (1% cf. residents, 4%), however, are more likely to mention a change of attitude or Environment Southland being more approachable (10% cf. residents, 3%), and engaging with farmers more (12% cf. residents, 2%).



Communication



IMPROVING COMMUNICATION: TOP FIVE; 2017 - 2019 RESULTS

This year, residents are more likely to mention that they are happy with what Environment Southland currently does (10% cf. 2018, 6%), as well as being unsure how Environment Southland could improve communication (30% cf. 2018, 22%).

	2019	2018	2017
Use Facebook/ social media more: Residents	11%	14%	11%
Happy with what they currently do: Residents	10%	6%	11%
More public/ community meetings: Residents	9%	7%	3%
Listen to the public more/ more collaboration: Residents	6%	5%	5%
More communication generally: Residents	6%	5%	4%
Something else: Residents	6%	6%	5%
Don't know/ not sure: Residents	22%	30%	25%
Farmers			
Engage with farmers more: Farmers	12%	14%	11%
Happy with what they currently do: Farmers	10%	14%	17%
Listen to the public more/ more collaboration: Farmers	10%	5%	7%
More public/ community meetings: Farmers	10%	10%	3%
Change attitude/ be more approachable: Farmers	10%	-	-
Something else: Farmers	11%	6%	7%
Don't know/ not sure: Farmers	21%	23%	25%



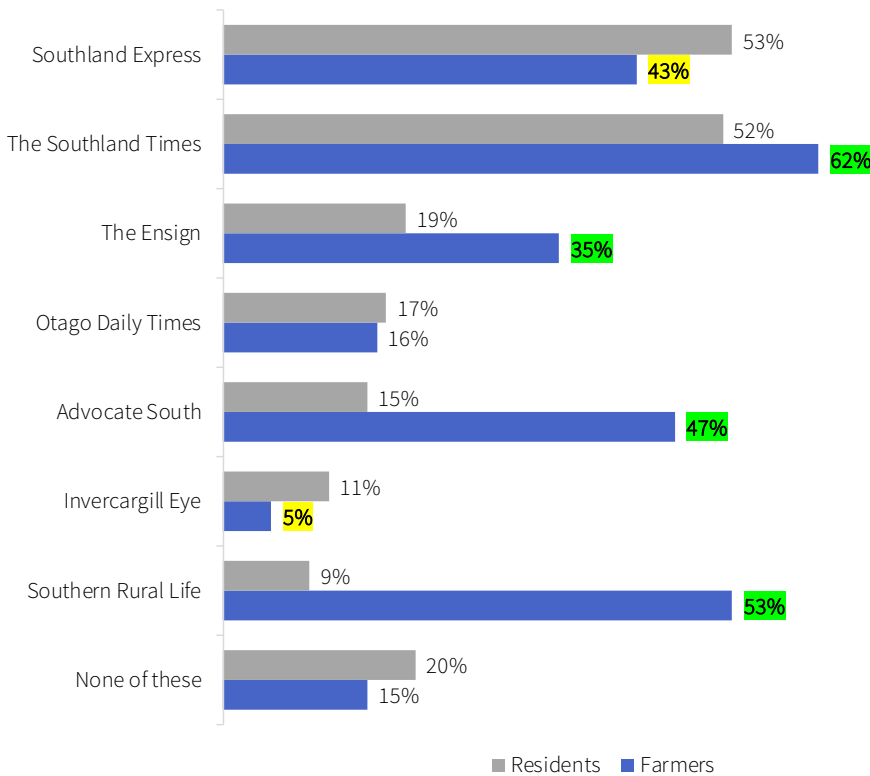
Communication: Print

Communication: Print



NEWSPAPERS READ REGULARLY: 2019 RESULTS

In 2019, *Southland Express* is the most popular newspaper read by residents (53%), while farmers are more likely to favour *The Southland Times* (62% cf. residents, 52%). Farmers are also more likely to mention that they read *The Ensign* (35% cf. residents, 19%), *Advocate South* (47% cf. residents, 15%), and *Southern Rural Life* (53% cf. residents, 9%), and less likely to mention that they read *Southland Express* (43% cf. residents, 53%), and the *Invercargill Eye* (5% cf. residents, 11%).



Communication: Print



NEWSPAPERS READ REGULARLY: 2014 - 2019 RESULTS; RESIDENTS

Readership of *Southland Express* has increased amongst residents this year (53% cf. 2018, 46%), while amongst farmers there has been an increase in readership of *Southern Rural Life* (53% cf. 42%), *Advocate South* (47% cf. 2018, 26%), and *Southern Express* (43% cf. 2018, 32%).

	2019	2018	2017	2016	2015	2014
Southland Express	53%	46%	52%	55%	57%	55%
The Southland Times	52%	55%	68%	71%	83%	85%
The Ensign	19%	15%	20%	20%	25%	19%
Otago Daily Times	17%	17%	12%	11%	10%	10%
Advocate South	15%	13%	23%	19%	24%	17%
Invercargill Eye	11%	11%	35%	40%	36%	43%
Southern Rural Life	9%	8%	10%	12%	15%	9%
None of these	20%	19%	14%	10%	7%	4%



NEWSPAPERS READ REGULARLY: 2014 - 2019 RESULTS; FARMERS

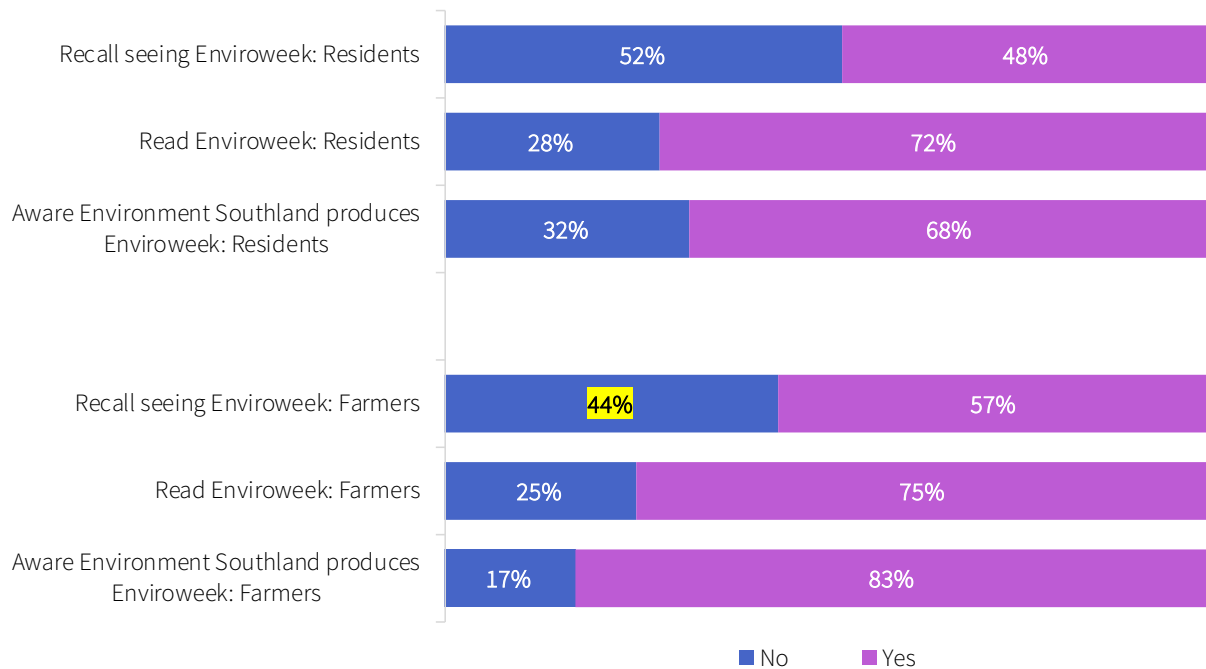
	2019	2018	2017	2016	2015	2014
The Southland Times	62%	59%	67%	83%	84%	82%
Southern Rural Life	53%	42%	55%	58%	66%	48%
Advocate South	47%	26%	34%	41%	44%	23%
Southland Express	43%	32%	38%	47%	43%	38%
The Ensign	35%	31%	42%	37%	49%	45%
Otago Daily Times	16%	10%	9%	10%	8%	15%
Invercargill Eye	5%	7%	13%	14%	16%	9%
None of these	15%	17%	9%	6%	6%	3%

Communication: Print



ENVIROWEEK AWARENESS AND USAGE: 2019 RESULTS

Close to half of residents (48%) recall seeing *Enviroweek*. A further 72% have read *Enviroweek*, and 68% are aware Environment Southland produces the publication. Fifty-seven per cent of farmers recall seeing *Enviroweek*, while a further 75% of farmers read *Enviroweek*, and 83% are aware Environment Southland produces the publication. This year, there is a significant increase in readership amongst residents (72% cf. 2018, 64%).



ENVIROWEEK AWARENESS AND USAGE: 2014 - 2019 RESULTS

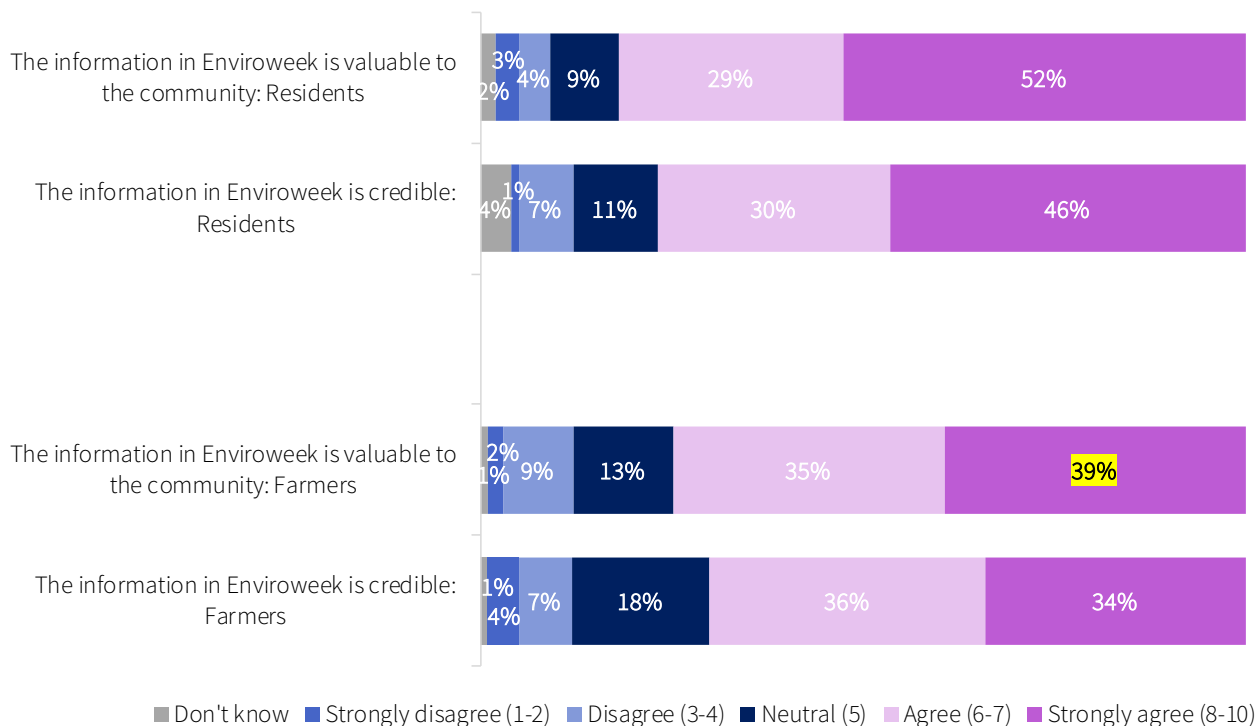
	2019	2018	2017	2016	2015	2014
Recall seeing Enviroweek: Residents	48%	43%	48%	48%	52%	59%
Read Enviroweek: Residents	72%	64%	69%	64%	73%	72%
Aware Environment Southland produces Enviroweek: Residents	68%	65%	70%	67%	64%	63%
Recall seeing Enviroweek: Farmers	57%	55%	57%	55%	55%	55%
Read Enviroweek: Farmers	75%	71%	67%	71%	73%	63%
Aware Environment Southland produces Enviroweek: Farmers	83%	82%	82%	76%	77%	76%

Communication: Print



ENVIROWEEK PERCEPTIONS: 2019 RESULTS

Eighty-one per cent of residents agree (29%) or strongly agree (52%) that the information in *Enviroweek* is valuable to the community; 74% of farmers agree (35%) or strongly agree (39% cf. residents, 52%) with this. A further 76% of residents agree (30%) or strongly agree (46%) that the information in *Enviroweek* is credible; 70% of farmers agree (36%) or strongly agree (34%) with this. Compared to last year's results, agreement amongst farmers that the information in *Enviroweek* is credible has significantly decreased (70% cf. 2018, 86%).



SATISFACTION RATINGS FOR ENVIROWEEK PERCEPTIONS: 2014 - 2019 RESULTS

	2019	2018	2017	2016	2015	2014
The information in Enviroweek is valuable to the community: Residents	81%	83%	82%	76%	84%	79%
The information in Enviroweek is credible: Residents	76%	76%	73%	67%	79%	73%
The information in Enviroweek is valuable to the community: Farmers	74%	83%	79%	76%	77%	79%
The information in Enviroweek is credible: Farmers	70%	86%	82%	65%	78%	75%

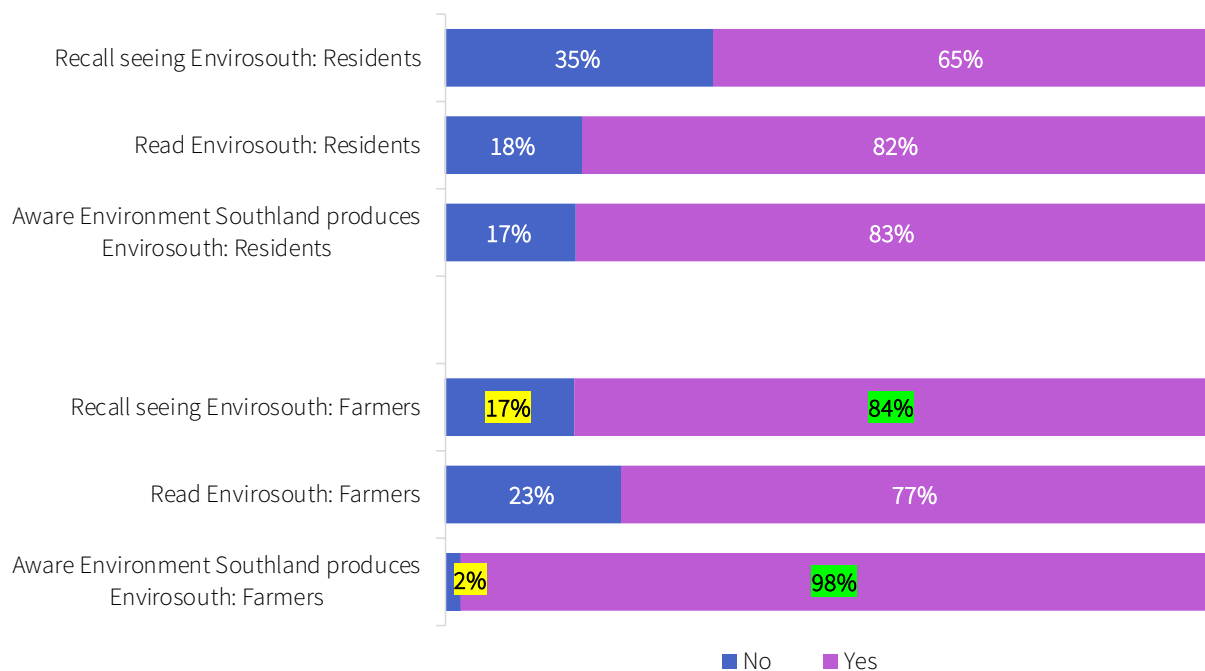
Communication: Print



ENVIROSOUTH AWARENESS AND USAGE: 2019 RESULTS

Sixty-five per cent of residents recall seeing *Envirosouth*. A further 82% have read *Envirosouth*, and 83% are aware Environment Southland produces the publication. Notably, there is a significant increase in residents mentioning that they read *Envirosouth* (82% cf. 2018, 75%).

Eighty-four per cent of farmers recall seeing *Envirosouth* and 77% have read the publication. Almost all farmers (98%) are aware Environment Southland produces *Envirosouth*. This year, there is a significant decrease in readership amongst farmers (77% cf. 2018, 86%).



ENVIROSOUTH AWARENESS AND USAGE: 2014 - 2019 RESULTS

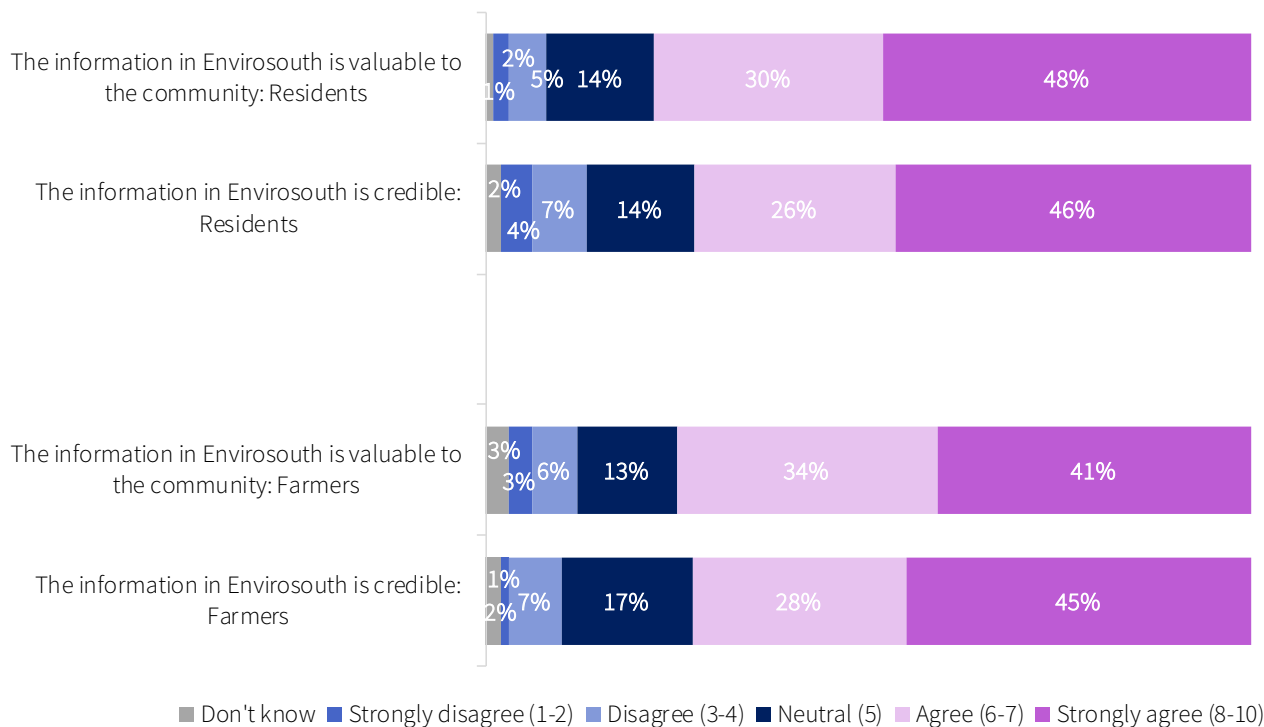
	2019	2018	2017	2016	2015	2014
Recall seeing Envirosouth: Residents	65%	65%	73%	69%	76%	74%
Read Envirosouth: Residents	82%	75%	77%	73%	76%	79%
Aware Environment Southland produces Envirosouth: Residents	83%	83%	87%	79%	84%	82%
Recall seeing Envirosouth: Farmers	84%	80%	82%	83%	90%	83%
Read Envirosouth: Farmers	77%	86%	78%	84%	81%	78%
Aware Environment Southland produces Envirosouth: Farmers	98%	96%	91%	91%	92%	95%

Communication: Print



ENVIROSOUTH PERCEPTIONS: 2019 RESULTS

Seventy-eight per cent of residents agree (30%) or strongly agree (48%) that the information in *Envirosouth* is valuable to the community; amongst farmers, 75% agree (34%) or strongly agree (41%) with this. Seventy-two per cent of residents agree (26%) or strongly agree (46%) that the information in *Envirosouth* is credible; amongst farmers 73% agree (28%) or strongly agree (45%). Compared to last year's results, agreement amongst farmers that the information in *Envirosouth* is credible has significantly decreased (73% cf. 2018, 85%).



SATISFACTION RATINGS FOR ENVIROSOUTH PERCEPTIONS: 2014 - 2019 RESULTS

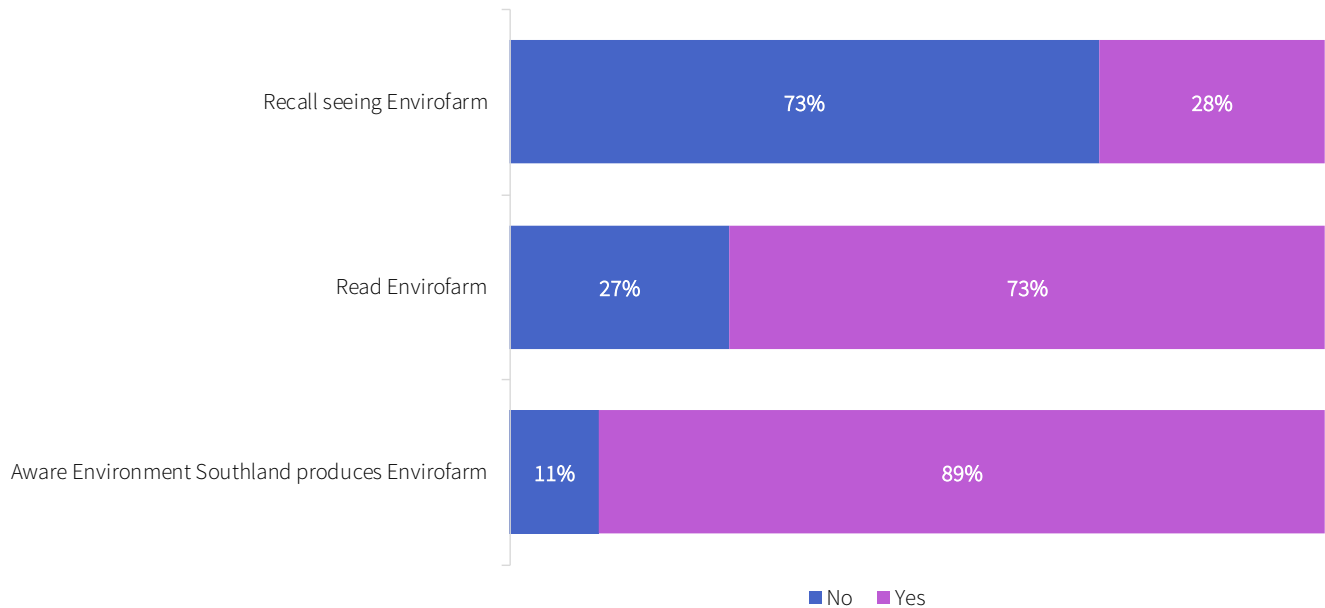
	2019	2018	2017	2016	2015	2014
The information in EnviroSouth is valuable to the community: Residents	78%	81%	76%	74%	84%	84%
The information in EnviroSouth is credible: Residents	72%	77%	73%	71%	78%	78%
The information in EnviroSouth is valuable to the community: Farmers	75%	83%	83%	72%	78%	79%
The information in EnviroSouth is credible: Farmers	73%	85%	85%	67%	77%	73%

Communication: Print



ENVIROFARM AWARENESS AND USAGE: 2019 RESULTS

More than a quarter of farmers recall seeing *Envirofarm* in 2019 (28%). A further 73% of farmers have read *Envirofarm*, and 89% are aware it is produced by Environment Southland. Although not statistically significant, readership of and awareness that Environment Southland produces *Envirofarm* have increased 2% and 14% respectively.



ENVIROFARM AWARENESS AND USAGE: 2014 - 2019 RESULTS

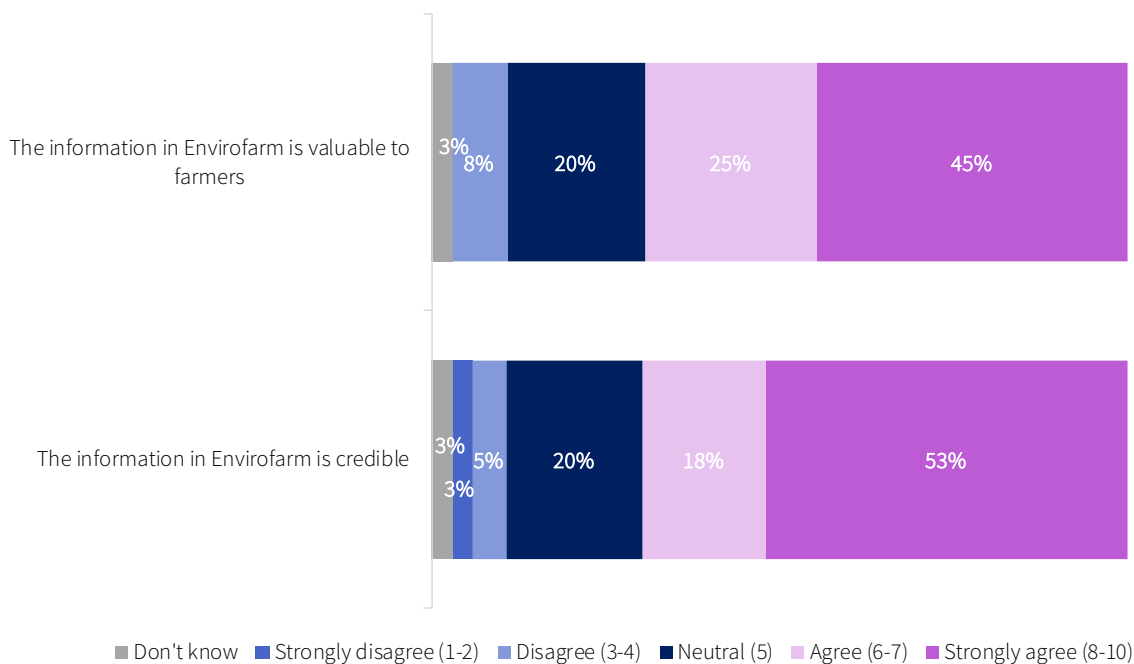
	2019	2018	2017	2016	2015	2014
Recall seeing Envirofarm	28%	28%	28%	27%	29%	37%
Read Envirofarm	73%	71%	63%	30%	72%	82%
Aware Environment Southland produces Envirofarm	89%	75%	70%	75%	78%	82%

Communication: Print



ENVIROFARM PERCEPTIONS: 2019 RESULTS

Seventy per cent of farmers agree (25%) or strongly agree (45%) that the information in *Envirofarm* is valuable to farmers, while 71% of farmers agree (18%) or strongly agree (53%) that the information in *Envirofarm* is credible.



SATISFACTION RATINGS FOR ENVIROFARM PERCEPTIONS: 2014 - 2019 RESULTS

	2019	2018	2017	2016	2015	2014
The information in Envirofarm is valuable to farmers	70%	80%	89%	76%	85%	80%
The information in Envirofarm is credible	71%	78%	86%	64%	80%	74%



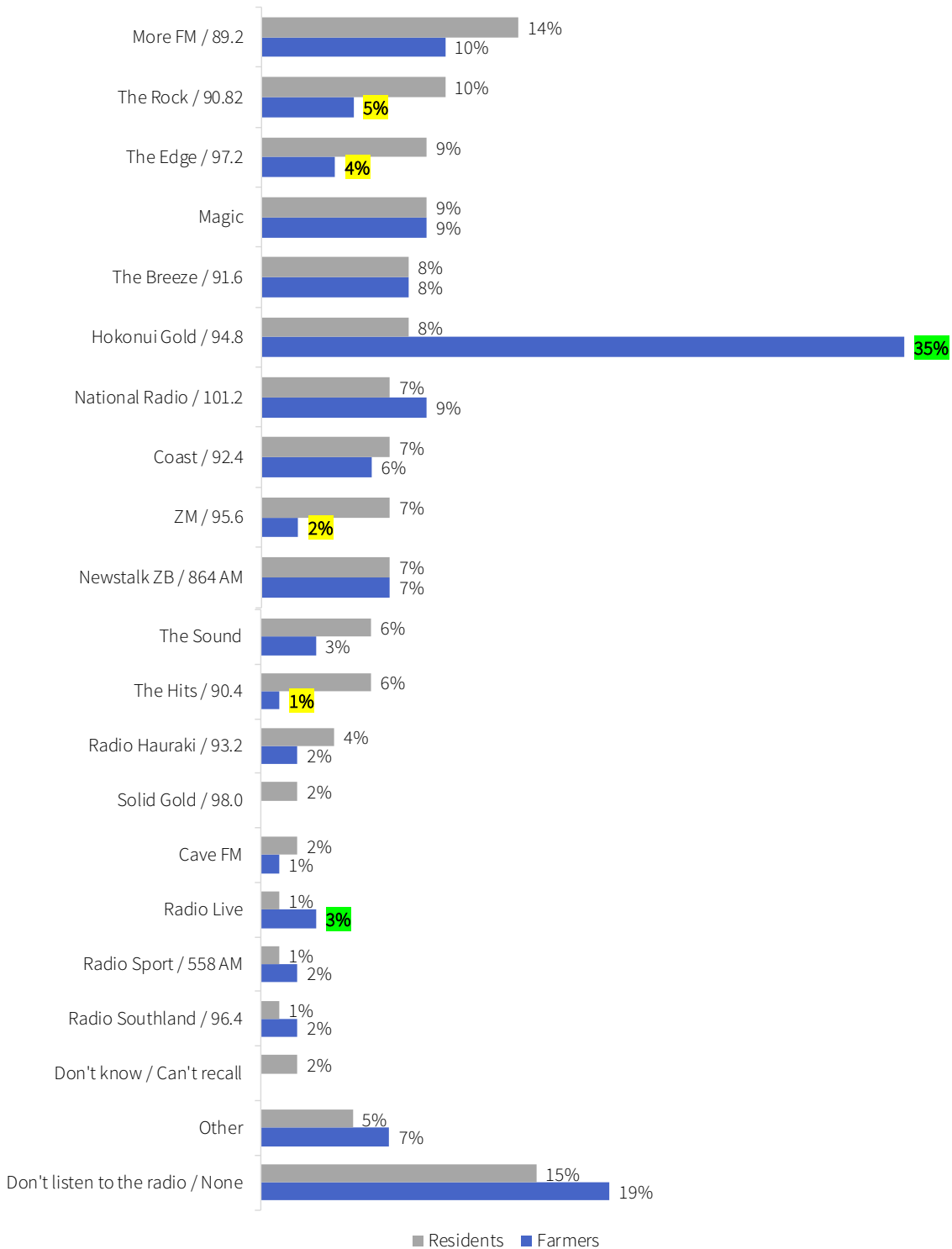
Communication: Radio

Communication: Radio



RADIO STATIONS LISTENERSHIP: 2019 RESULTS

More FM (14%), and The Rock (10%) are the most popular radio stations amongst residents in 2019, while farmers are more likely to mention they listen to Hokonui Gold (35% cf. residents, 8%), and Radio Live (3% cf. residents, 1%).



Communication: Radio



RADIO STATIONS LISTENERSHIP: 2014 - 2019 RESULTS; RESIDENTS

Residents are more likely to listen to Magic in 2019 (9% cf. 2018, 5%), and less likely to listen to Radio Live (1% cf. 2018, 3%) compared to last year's results.

	2019	2018	2017	2016	2015	2014
More FM / 89.2	14%	13%	14%	17%	14%	12%
The Rock / 90.82	10%	11%	10%	15%	9%	13%
The Edge / 97.2	9%	12%	10%	13%	9%	12%
Magic	9%	5%	4%	-	-	-
The Breeze / 91.6	8%	7%	5%	6%	7%	4%
Hokonui Gold / 94.8	8%	9%	9%	13%	12%	9%
National Radio / 101.2	7%	6%	7%	6%	8%	8%
Coast / 92.4	7%	7%	9%	11%	9%	11%
ZM / 95.6	7%	8%	9%	10%	8%	7%
Newstalk ZB / 864 AM	7%	5%	4%	6%	5%	6%
The Sound	6%	4%	6%	7%	5%	4%
The Hits / 90.4	6%	8%	6%	6%	8%	10%
Radio Hauraki / 93.2	4%	5%	6%	6%	3%	4%
Solid Gold / 98.0	2%	1%	1%	3%	2%	2%
Cave FM 106.4	2%	-	-	-	-	-
Radio Live	1%	3%	5%	6%	6%	4%
Radio Sport / 558 AM	1%	2%	3%	3%	3%	2%
Radio Southland / 96.4	1%	3%	1%	2%	-	-
ZAFM / 98.8	0%	1%	2%	4%	-	-
Don't know / Can't recall	2%	2%	4%	5%	-	-
Other	5%	6%	5%	10%	4%	3%
Don't listen to the radio / None	15%	18%	12%	10%	14%	14%

Communication: Radio



RADIO STATIONS LISTENERSHIP: 2014 - 2019 RESULTS; FARMERS

In 2019, farmers are more likely to listen to Magic (9% cf. 2018, 2%), and less likely to listen to The Rock (5% cf. 2018, 11%), Radio Hauraki (2% cf. 2018, 6%), ZM (2% cf. 2018, 9%), and The Hits (1% cf. 2018, 5%), compared to last year's results.

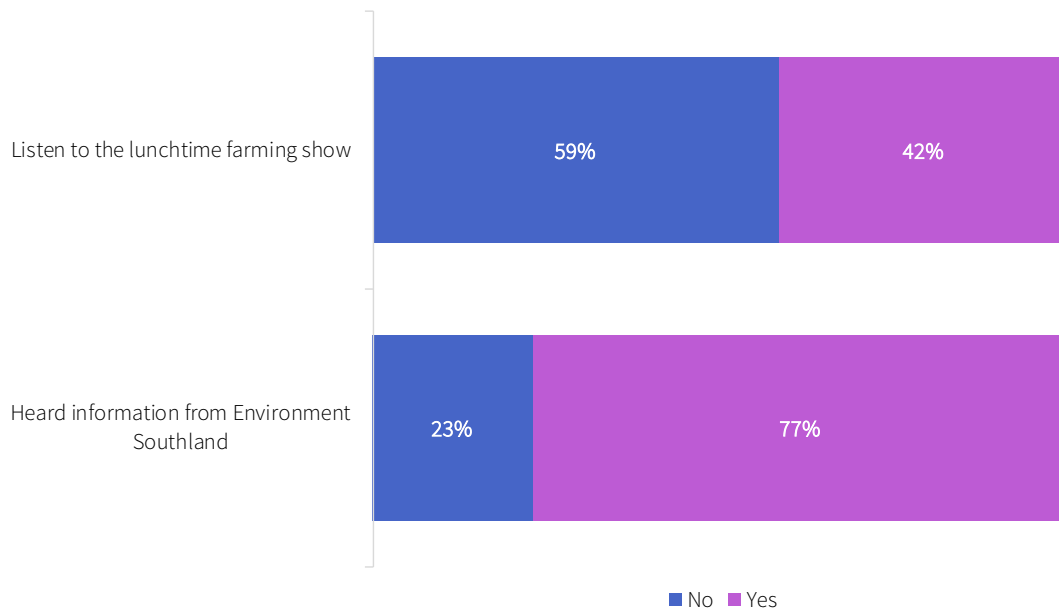
	2019	2018	2017	2016	2015	2014
Hokonui Gold / 94.8	35%	39%	42%	45%	46%	45%
More FM / 89.2	10%	11%	10%	11%	8%	9%
Magic	9%	2%	3%	-	-	-
National Radio / 101.2	9%	7%	2%	10%	6%	10%
The Breeze / 91.6	8%	6%	8%	5%	5%	9%
Newstalk ZB / 864 AM	7%	8%	5%	8%	6%	2%
Coast / 92.4	6%	6%	6%	5%	6%	9%
The Rock / 90.82	5%	11%	20%	7%	14%	7%
The Edge / 97.2	4%	7%	11%	8%	8%	9%
The Sound	3%	5%	6%	6%	4%	6%
Radio Live	3%	4%	2%	5%	3%	4%
Radio Hauraki / 93.2	2%	6%	9%	4%	4%	2%
Radio Sport / 558 AM	2%	3%	5%	2%	2%	4%
ZM / 95.6	2%	9%	8%	5%	3%	9%
Radio Southland / 96.4	2%	2%	2%	1%	-	-
The Hits / 90.4	1%	5%	3%	3%	4%	11%
Cave FM 106.4	1%	-	-	-	-	-
Solid Gold / 98.0	0%	1%	2%	1%	0%	3%
ZAFM / 98.8	0%	4%	3%	2%	-	-
Don't know / Can't recall	0%	3%	1%	5%	-	-
Other	7%	3%	4%	11%	2%	3%
Don't listen to the radio / None	19%	14%	10%	9%	11%	14%

Communication: Radio



LUNCHTIME FARMING SHOW AWARENESS: 2019 RESULTS

Forty-two per cent of farmers mention that they listen to the lunchtime farming show, while 77% of farmers have heard information from Environment Southland on the lunchtime farming show. These results remain similar to last year's results.



LUNCHTIME FARMING SHOW AWARENESS: 2014 - 2019 RESULTS

	2019	2018	2017	2016	2015	2014
Listen to the lunchtime farming show	42%	43%	50%	46%	48%	50%
Heard information from Environment Southland on the show	77%	75%	72%	64%	59%	73%

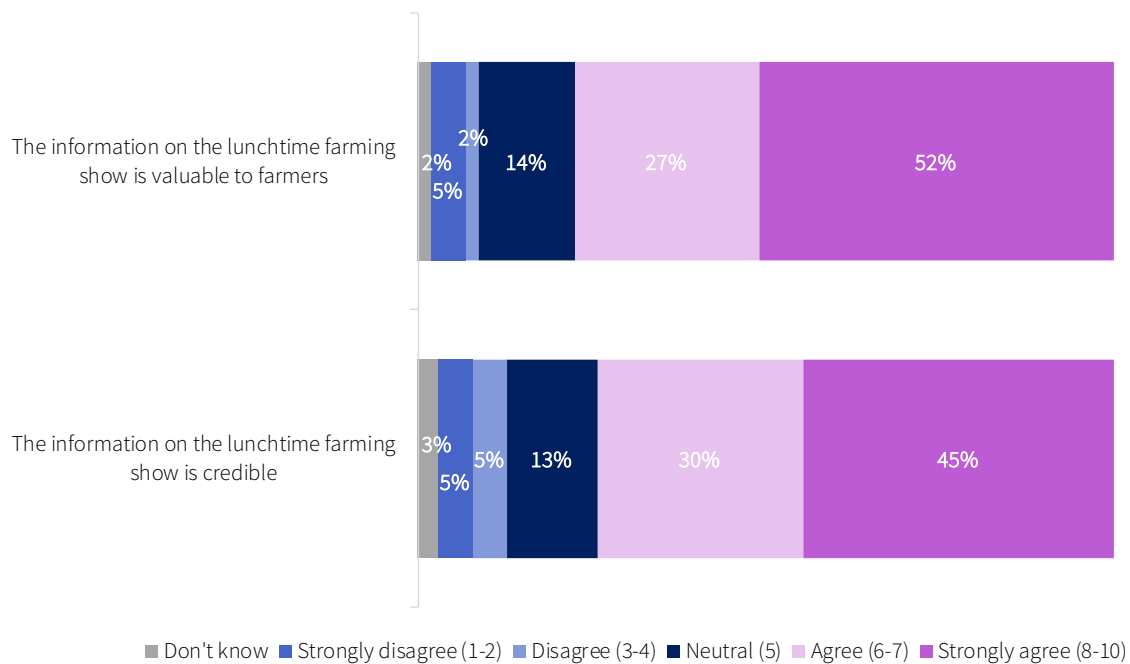
Communication: Radio



LUNCHTIME FARMING SHOW PERCEPTIONS: 2019 RESULTS

Seventy-nine per cent of farmers agree (27%) or strongly agree (52%) that the information on the lunchtime farming show is valuable, while 75% of farmers agree (30%) or strongly agree (45%) that the information on the lunchtime farming show is credible.

Agreement ratings that the information on the lunchtime farming show is credible have significantly decreased this year (75% cf. 2018, 91%).



SATISFACTION RATINGS FOR LUNCHTIME FARMING SHOW PERCEPTIONS: 2014 - 2019 RESULTS

	2019	2018	2017	2016	2015	2014
The information on the lunchtime farming show is valuable to farmers	79%	90%	86%	88%	79%	77%
The information is credible	75%	91%	79%	79%	80%	81%



Communication: Online & Social Media

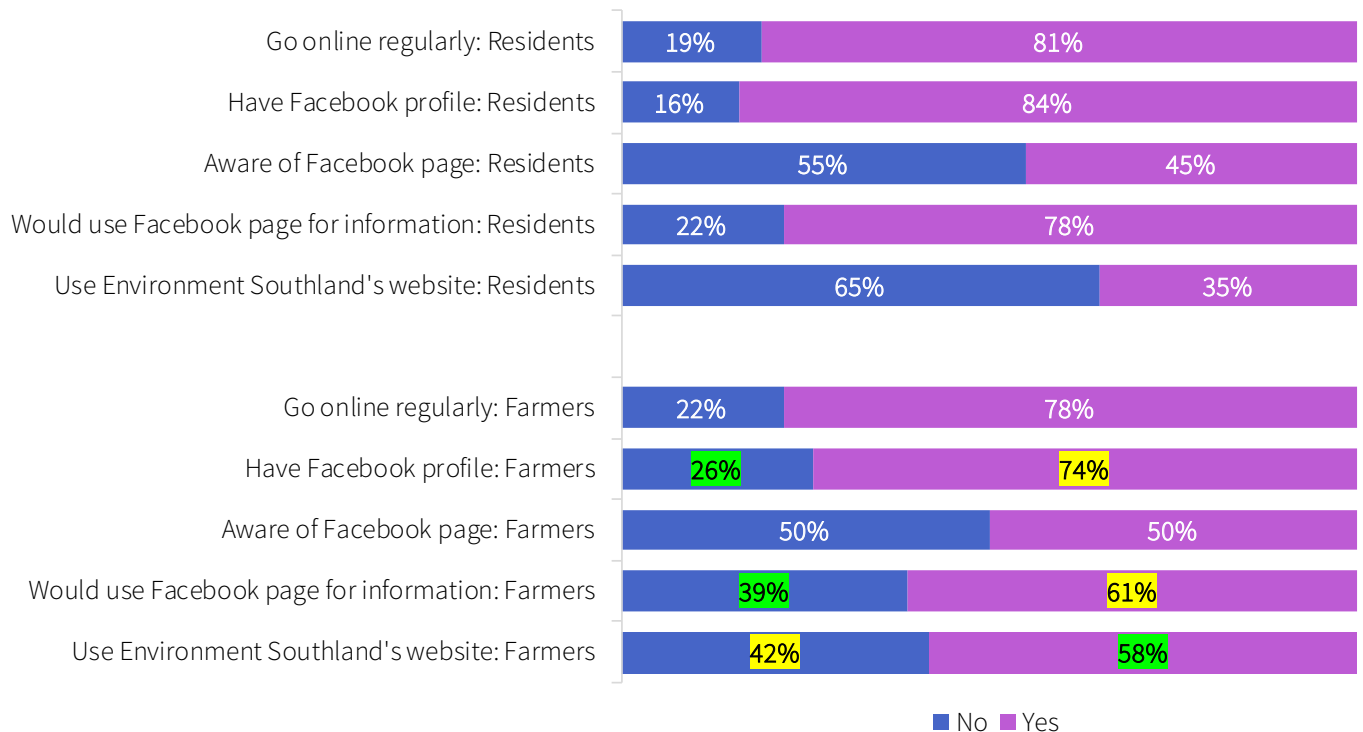
Communication: Online



INTERNET AND SOCIAL MEDIA USAGE: 2019 RESULTS

Eighty-one per cent of residents indicate they go online regularly, while 84% mention they have a Facebook profile. Close to half of residents are aware Environment Southland has a Facebook page, a significant increase from last year's results (45% cf. 2018, 38%). Seventy-eight per cent of residents would use the Facebook page to source information, while 35% would use the website.

Amongst farmers, 78% indicate they go online regularly, while 74% of farmers have a Facebook profile, a significant decrease from last year's result (cf. 2018, 84%). Half of farmers are aware Environment Southland has a Facebook page (50%), while 61% mention they would use Environment Southland's Facebook page for information. Fifty-eight per cent of farmers also mention they use Environment Southland's website.



Communication: Online



INTERNET AND SOCIAL MEDIA USAGE: 2014 - 2019 RESULTS

Compared to last year's results, residents are more likely to mention that they are aware that Environment Southland has a Facebook page (45% cf. 2018, 38%), while farmers are less likely to have a Facebook profile (74% cf. 2018, 84%).

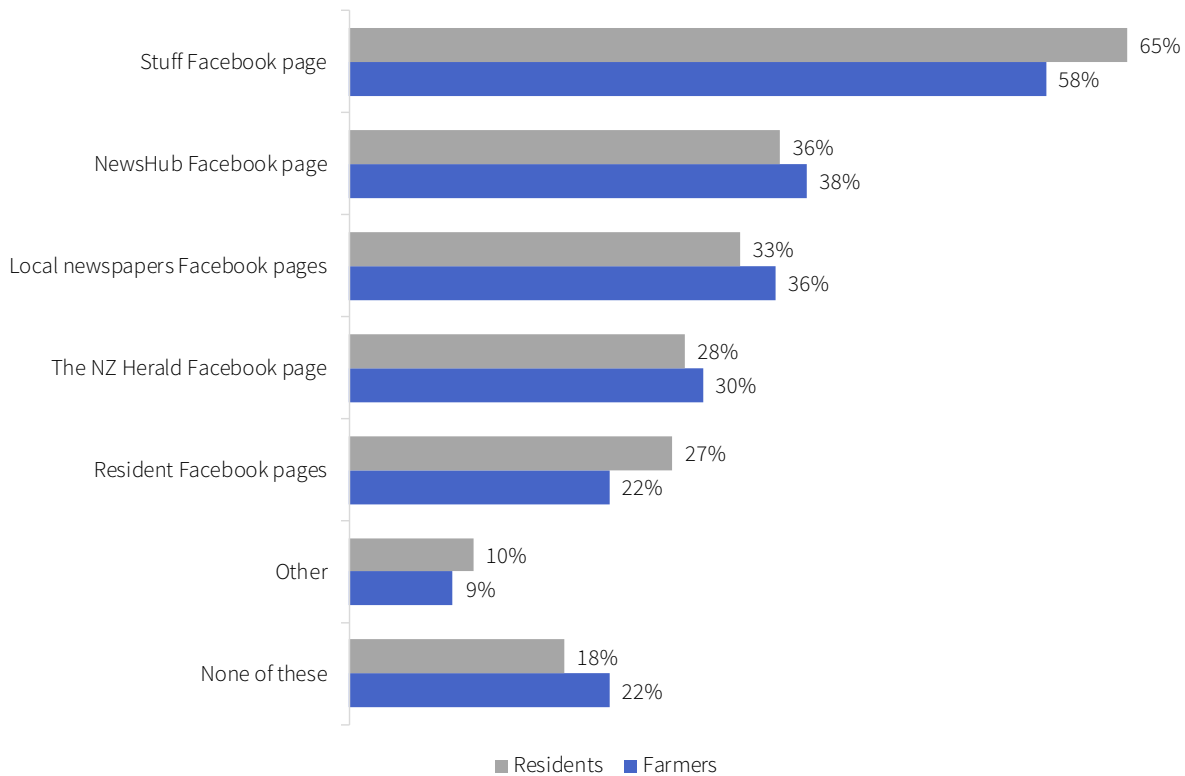
	2019	2018	2017	2016	2015	2014
Go online regularly: Residents	81%	84%	85%	78%	72%	74%
Have Facebook profile: Residents	84%	87%	83%	82%	77%	67%
Aware Environment Southland has a Facebook page: Residents	45%	38%	38%	33%	31%	25%
Would use Environment Southland's Facebook page: Residents	78%	75%	69%	64%	60%	55%
Use the website: Residents	35%	33%	26%	17%	30%	26%
Farmers						
Go online regularly: Farmers	78%	77%	77%	72%	74%	75%
Have Facebook profile: Farmers	74%	84%	74%	65%	54%	50%
Aware Environment Southland has a Facebook page: Farmers	50%	53%	55%	49%	41%	28%
Would use Environment Southland's Facebook page: Farmers	61%	71%	66%	51%	44%	46%
Use the website: Farmers	58%	65%	66%	39%	48%	55%

Communication: Online



ACCESSING FACEBOOK PAGES: 2019 RESULTS

In a new question for 2019, respondents were asked what Facebook pages they regularly engage with. The primary mentions are: the Stuff Facebook page (residents: 65%, farmers: 58%), the NewsHub Facebook page (residents: 36%, farmers: 38%), and local newspaper Facebook pages (residents: 33%, farmers: 36%).

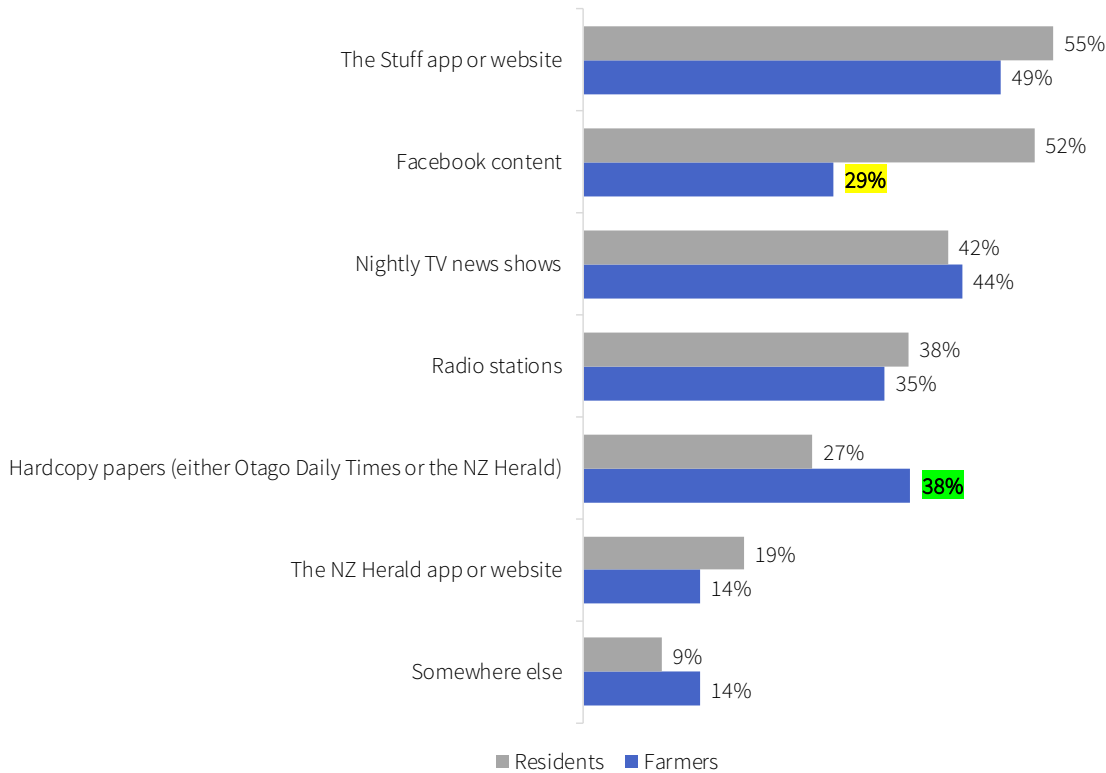


Communication: Online



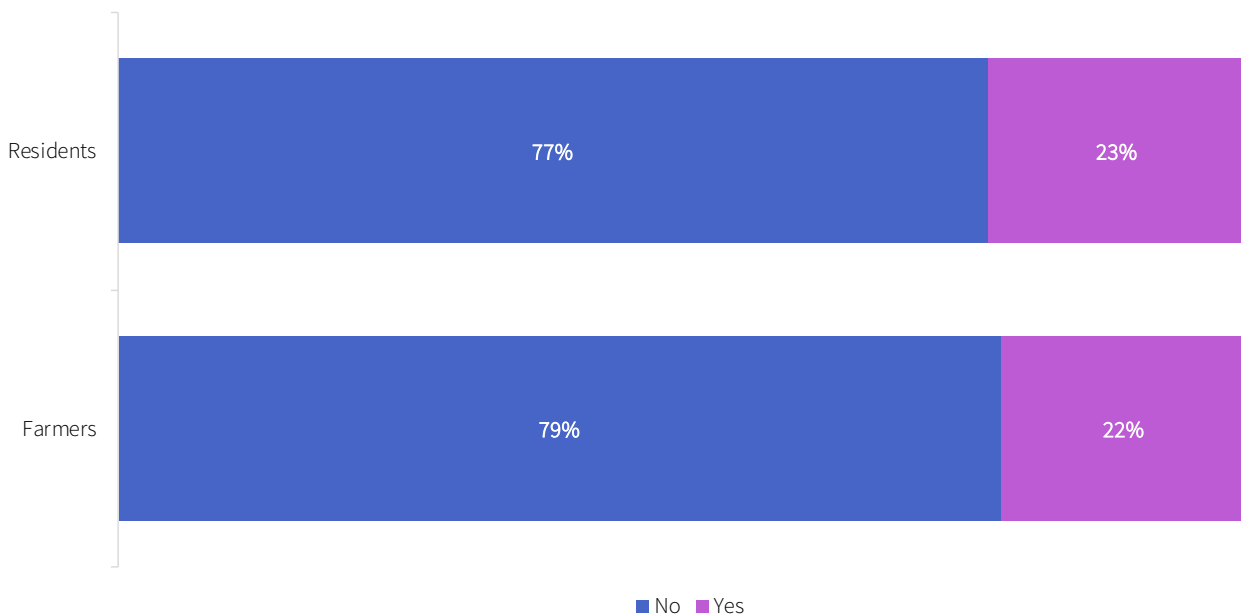
RECEIVING DAILY NEWS: 2019 RESULTS

In a new question for 2019, more than half of residents (55%) get their daily news from the Stuff app or website, while 49% of farmers use this platform. Notably, farmers are more likely to mention they get their news from either Otago Daily Times or New Zealand Herald (38% cf. residents, 27%).



ACCESSING INTERNATIONAL SITES FOR NEWS: 2019 RESULTS

In a new question for 2019, 23% of residents, and 22% of farmers access international sites to get their daily news. The primary mentions amongst respondents are BBC (residents: 31%, farmers: 23%), CNN (residents: 20%, farmers 19%), and El Jazeera (residents: 10%, farmers: 7%).



Subgroup Results

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



GENDER

MALE

More likely to be aware that Environment Southland has a Facebook page (52%).

FEMALE

More likely to go online regularly (84%).

More likely to have a Facebook profile (89%).



AGE

UNDER 39

More likely to go online regularly (90%).

More likely to have a Facebook profile (93%).

More likely to look at Environment Southland's Facebook page for information (83%).

40 - 59

More likely to go online regularly (87%).

More likely to access Environment Southland's website for information (47%).

60+

No significant differences noted.



AREA

GORE

No significant differences noted.

INVERCARGILL

No significant differences noted.

SOUTHLAND

More likely to get information about Environment Southland from Environment Southland publications (26%).



Concluding Comments

Concluding Comments

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

Impressions and ratings of Environment Southland have decreased compared with last year's results, however farmers continue to rate Environment Southland more positively than residents.

Farmers are more likely to have seen Environment Southland in the local community, they are also more likely to think that Environment Southland is approachable, and understands Southlanders' aspirations for the environment.

Farmers are also more likely to have provided their views to Environment Southland this year, the primary issue mentioned is the land and water plan. This group is also more likely to indicate that they have taken steps to improve water quality in the last 12 months; the primary action being to fence off waterways, clear waterways, or exclude stock.

Water, water quality, and water pollution remains the biggest priority amongst residents and farmers for Southland's environment.

Farmers are more likely to think that Environment Southland is responding well to these priorities, and that Environment Southland is doing a better job than last year.

Amongst respondents, decreases can be seen around impressions of the information Environment Southland provides the community. The leading reason for residents regarding what Environment Southland could do to improve communication is to use Facebook or social media more; for farmers, it would be to engage with this group more.

Newspaper readership in general has increased this year across both residents and farmers.

Awareness of, and readership, as well as awareness that Environment Southland produces *Enviroweek*, and impressions of the information within the publication remain similar to last year's results.

Awareness of, as well as awareness that Environment Southland produces *Envirosouth* remain similar to last year's results. Residents readership of *Envirosouth* has

increased this year, while amongst farmers readership has decreased.

Awareness and readership of *Envirofarm* is similar to last year's results, however perceptions of the publication have decreased this year.

There has been a significant increase in listenership of the Magic radio station amongst residents and farmers this year.

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 has decreased this year.

Amongst residents, awareness that Environment Southland has a Facebook profile has increased, while decrease can be seen in farmers having a Facebook profile.

The majority of respondents access Facebook pages, while the Stuff app or website is the leading mention for receiving daily news.

Points to Consider

Based on the above findings, Environment Southland could consider the following points for future communication strategies.

KEEP A STRONG FOCUS ON WATER ISSUES

Water, water quality and water pollution are the primary mentions amongst residents and farmers regarding the main priority for the region in 2019.

“Water is the most precious commodity today.”
(Resident)

Despite this, only a proportion of residents and farmers think that Environment Southland’s response to these priorities is well, or very well. Thus, it is important that Environment Southland keeps pushing the point on water issues so that the community continue to understand upcoming water work and maintenance as it is a comprehensive issue.

Further communication from Environment Southland around water quality and water pollution, and what actions Environment Southland is taking could help increase positive perceptions here. By keeping these communication channels open, and continuing to increase community involvement may help increase overall satisfaction with Environment Southland’s actions.

ENGAGE MORE WITH FARMERS

This year, impressions and ratings of Environment Southland have decreased amongst farmers. Generally, farmers appear to be less positive about Environment Southland; some farmers mention Environment Southland could engage and collaborate with this group more and that Environment Southland could change its perceived attitude, or be more approachable.

“They could perhaps have sometimes a less abrasive approach towards the farming community, less confrontational approach. Sometimes it can be an us and them situation and I think they need to get past that. Maybe even a one on one approach to members of the farming community as well, approach them and talk to them.” (Farmer)

There appears to be a slight downward trend with farmers less likely to trust the information Environment Southland has provided in the past three

years. Meaningful engagement with farmers, as well as continuing to listen and collaborate with them, may help increase impressions and ratings of Environment Southland. However, Environment Southland will need to ensure its messages demonstrate it has listened to, and understands the farming community’s views.

“They need to make themselves more approachable to farmers as people who understand farmers. They need to listen to farmers with their ears open rather than making assumptions. They need to get some farmers onto their organisation so there is someone who knows and understands farmers and farming. They also need to acknowledge those farmers who do a good job.”
(Farmer)

In saying this, it should also be noted that there appears to be a divide between farmers and residents around some environmental issues including water quality and pollution, as well as urban pollution and pollution from sewerage.

“Environment Southland needs to close up the rural and urban divide. We are all trying our best.” (Farmer)

“Being a dairy farmer, I am a bit concerned about how much is pointed towards us as the ones responsible for contaminating the waterways. I think that local councils and townspeople also have a responsibility in keeping our waterways clean. Basically, I just don’t feel it is a level playing field, contamination wise anyway.”
(Farmer)

To help minimise this, Environment Southland representatives will need to treat future communication sensitively as to not alienate either group, particularly around communication through the media.

TARGETED CAMPAIGNS TO ALL AUDIENCES

Residents’ awareness of Environment Southland has decreased this year; in particular younger residents’ awareness and impressions of Environment Southland remains low. Younger residents are often non-ratepayers, and the inclusion of this demographic often results in decreases in general awareness and interaction measures.

Points to Consider

Consideration should be given to how best engage with harder to reach groups, such as younger residents; this age group are more likely to go online regularly, and are more likely to have a Facebook profile.

"...Facebook I guess? I've been living in Invercargill for over a year and this is the first I have heard of them."
(Resident)

While social media is an important part of any communications strategy, it needs to be of a 'collective nature' in order for people to engage with it. The 'Share Your Wai' photo competition in 2018 appears to have been a successful way to engage all parts of the Southland community in way that wasn't about the traditional local government areas, e.g., policy and processes or consents. Campaigns such as this can help to grow levels of engagement with people who don't traditionally engage with a regional council. Strong branding in this space may assist with awareness measures.



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