

BIOSECURITY 2025

STRATEGIC DIRECTION 1: A BIOSECURITY TEAM OF 4.7 MILLION BUSINESS SURVEY

Target: 90% of relevant businesses are actively managing pest and disease risk associated with their business

March 2018

This research was conducted in collaboration with the MPI Research and Evaluation Team

Executive Summary



Context for survey results

This research was undertaken to get a baseline for the business-related target of Strategic Direction 1:

90% of relevant businesses are actively managing pest and disease risk associated with their business.

We therefore explored different elements of businesses 'actively managing biosecurity', including:

- actions they take, and the frequency with which they undertake them
- self-reported knowledge about biosecurity
- whether or not they collaborate on biosecurity matters
- their motivations for taking action and having biosecurity partnerships
- their confidence in their ability to spot pests, weeds, and diseases
- anticipated reactions to finding pests, weeds, and diseases
- perceived responsibility for biosecurity
- whether or not they have written documents or processes regarding biosecurity
- whether or not biosecurity is discussed at management meetings
- whether or not biosecurity is discussed with staff
- the extent to which they see themselves as part of the wider biosecurity system
- who, in their opinion, has a role to play in biosecurity
- views on working with Māori and understanding Māori values in relation to biosecurity

We took a lead from Biosecurity 2025 and focused our business research on those business sectors most likely to be impacted by biosecurity. These are transport, distribution, and logistics businesses, as well as primary producers.

Because these two groups are somewhat distinct in their operations, we report them separately throughout the report.

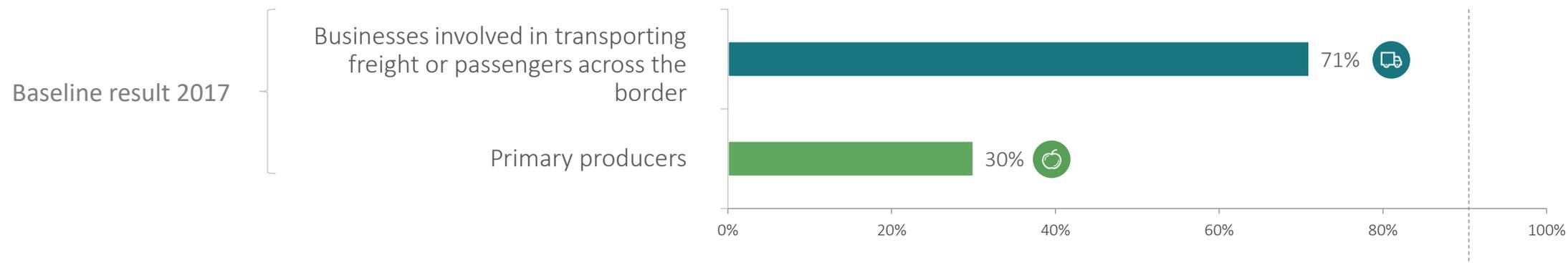
Executive summary: biosecurity target, actions, and perception of involvement in the wider system



Biosecurity 2025 target ... 90% of relevant businesses are actively managing pest and disease risk associated with their business

71% of transport/distribution businesses and 30% of producers are actively managing pest and disease risk associated with their business.

*Percentage who undertake their most frequent biosecurity action more often than just “when required” and view their business as part of the wider biosecurity system**



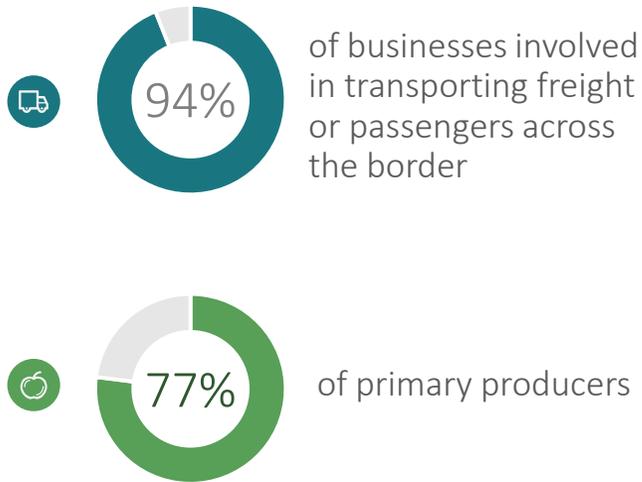
Base: all those where target could be assessed (excludes people who provided ‘don’t know’ answers to relevant questions or were not asked) (n transport = 103, n producers = 637)

*Those rating 7 or greater on a scale of 0 to 10, where 10 means ‘an extremely important part’

- Seventy one-percent of transport/distribution businesses and 30% of primary producers undertake their most frequent biosecurity action more than just “when required” and perceive their business as part of the wider biosecurity system.
- Across all businesses, larger businesses and those who are involved in importing or exporting tend to be more likely than others to meet target.
- Common biosecurity actions taken by transport/distribution businesses include border control/clearance tasks (19% do this), documentation/declaration procedures (18%) and compliance procedures (16%). Primary producers are most likely to monitor and check for pests (24%), or undertake stock health actions, spraying, or weed monitoring or control (21% respectively).

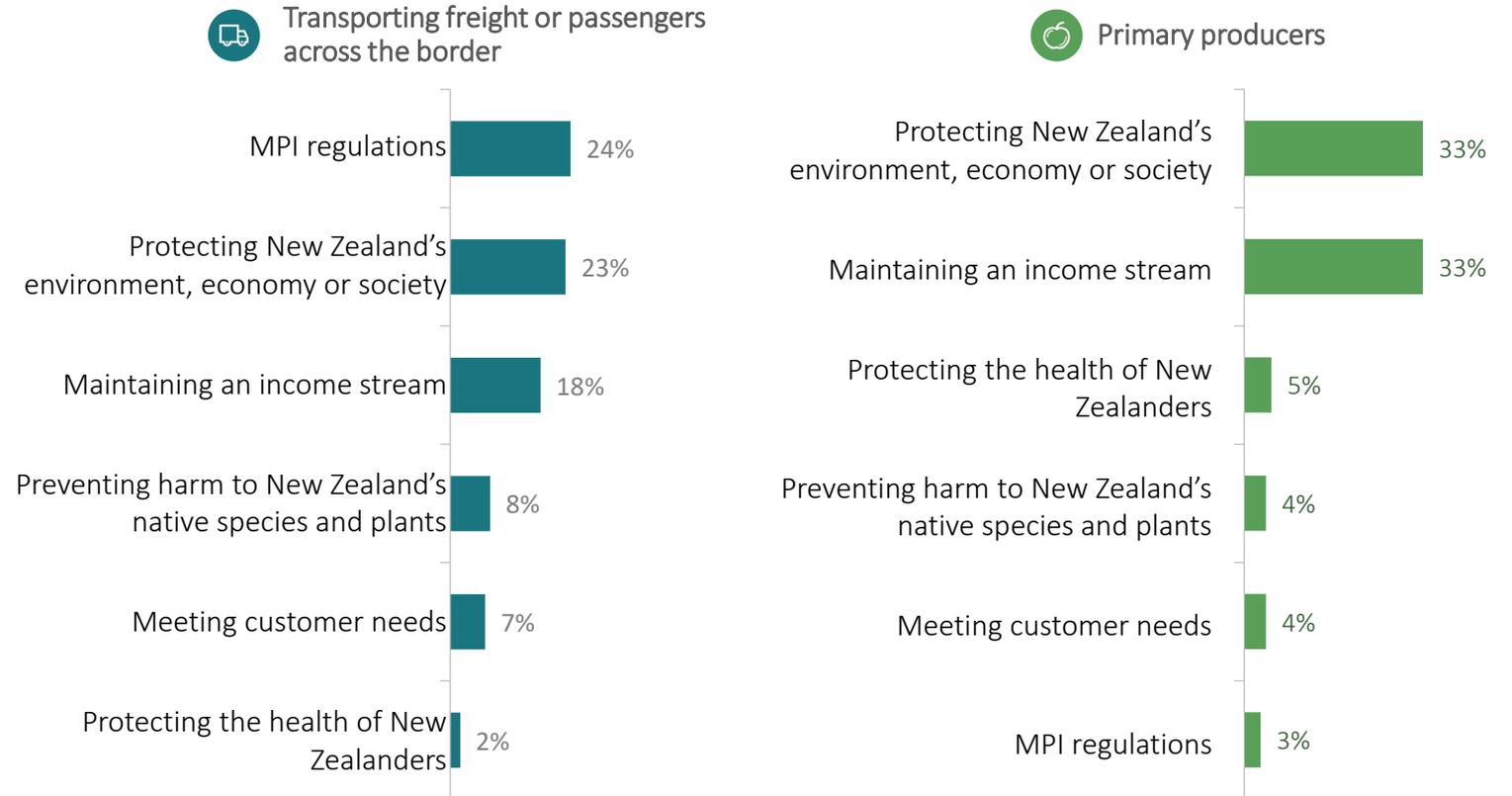
Executive summary: motivations and understanding

Proportion that rate their understanding of biosecurity as 7 or greater out of 10



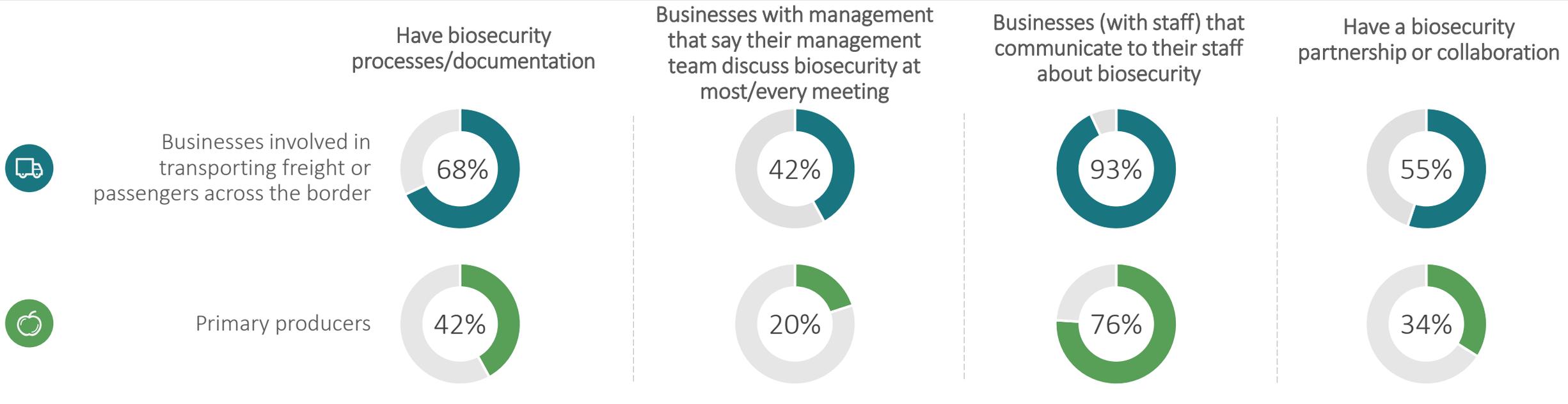
- Most businesses see themselves as having a good knowledge of biosecurity.
- Transport/distribution businesses are more likely to rate their knowledge highly than producers.

Key motivations for being involved in biosecurity (when asked to choose 'one main motivation')



- Protecting New Zealand and maintaining an income stream are key motivations for businesses, particularly producers.
- Transport/distribution businesses are more likely to be motivated by MPI regulations.

Executive summary: processes, management, communication, and partnerships



- Biosecurity is more central to the operation of transport/distribution businesses, compared to producers. Nearly all communicate to staff about biosecurity, whilst two thirds have written biosecurity processes or documentation. Just over half have a biosecurity partnership or collaboration with another organisation, whilst two in five say they discuss biosecurity at most or every management meeting.
- Three quarters of producers communicate with staff about biosecurity, but less than half have written biosecurity processes or documentation, have a biosecurity partnership or collaboration with another organisation, or generally discuss biosecurity at management meetings.
- Among producers, larger businesses (with at least 20 employees), exporters, and those in the horticulture industry tend to be more engaged than average with biosecurity across these measures.

Background, objectives, approach, and introduction



Background and objectives

The “Biosecurity 2025: Direction Statement for New Zealand’s biosecurity system” sets out the strategic directions for strengthening New Zealand’s biosecurity system over the coming years.

Strategic Direction 1 (SD1) aims to develop a “biosecurity team of 4.7 million” and includes a number of specific targets calibrated towards achieving this goal.

MPI commissioned Colmar Brunton to develop and implement a survey tool that establishes a baseline for the targets outlined under SD1, which will also enable progress to be tracked over time.

- **Business target:** 90% of relevant businesses are actively managing pest and disease risk associated with their business and have committed to biosecurity actions through key planning and strategy documents and/or adopting active biosecurity management practices. (Research questions are on a slide below).

Other targets were assessed using data from a survey of the general-public (March 2018 report) - these include:

- 75% of New Zealanders understand what biosecurity means and why it is important
- 80% of New Zealanders accept those involved in managing, controlling, and eradicating pests and diseases use appropriate tools and activities, such as controlled spraying, use of poison baits, and/or movement restrictions
- 80% of New Zealanders find it easy to understand what they need to do if they find a pest or disease
- 500,000 New Zealanders regularly take action to control plant or animal pests in their community

SD1 Targets

1,000

TELEPHONE INTERVIEWS
with relevant businesses



FIELDWORK DATES
28 November 2017 to 9 February 2018

SAMPLING AND WEIGHTING

The survey includes two groups of relevant businesses:

- transport/distribution businesses involved in transporting freight, passengers and/or cargo internationally (referred to as ‘transport/distribution’ businesses in this report).
- primary producers (referred to as ‘producers’ in this report).



At each business we asked to speak with the Operations Manager (or ‘the owner’ in small businesses).

Please note that a small number of businesses (30) were *both* transport/distribution businesses *and* producers (this small group are included in graphics/figures for both sets of businesses).

The data has been post-weighted to ensure the total sample is representative of the New Zealand business population by size and sector (including a representative spread of businesses involved in international transport/distribution and primary producers). This involves substantial up-weighting of small businesses and livestock businesses. The unweighted and weighted sample profile can be found on Page 43 along with a detailed description of the methodology.

SIGNIFICANCE TESTING

Any differences between sub-groups and the average are statistically significant at the 95% confidence level (unless otherwise specified).

NETT RESULTS

Nett results may not always add to the sum of their parts shown in a chart, this is due to rounding.

For example:

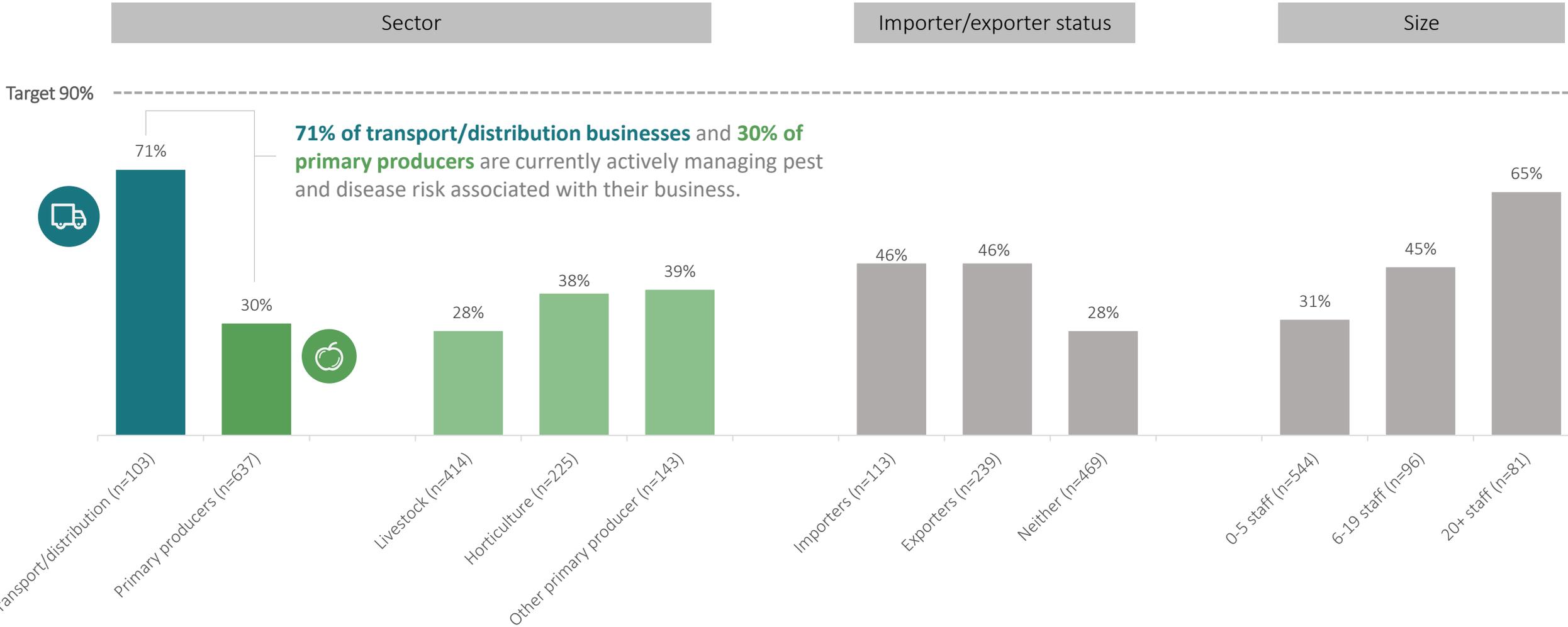
12% ‘Strongly agree’ and **48% ‘Tend to agree’** that they know what they should do if they find an unusual pest, weed, or disease. However, **the ‘Nett agree’ percentage is 59% (not 60%).**

Meeting target





Biosecurity 2025 target... 90% of relevant businesses are actively managing pest and disease risk associated with their business



Definition of meeting target: undertaking at least one biosecurity action (as long as their most frequent action is done on at least a monthly basis) and sees their business as part of the wider biosecurity system (rating 7 or greater out of 10, where 10 means 'an extremely important part').

Understanding of biosecurity



Self-assessed understanding of biosecurity

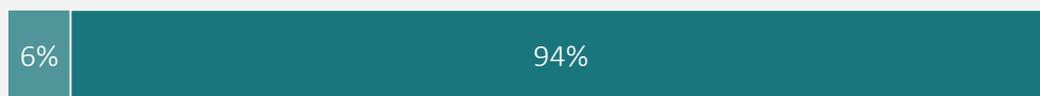
Businesses tend to think they know a lot about biosecurity, though transport/distribution businesses rate their understanding of biosecurity higher than producers (94% rated their understanding as 7 out of 10 or greater, compared to 77% of producers). The equivalent figure among the general public is 61%.

How would you rate your understanding as to what the term 'biosecurity' means?

Ratings from '0 - I don't understand it at all' to '10 - I know exactly what it means'

■ Don't know ■ 0 to 3 ■ 4 to 6 ■ 7 to 10

Transport/distribution



Producers



■ Don't know ■ 0 to 3 ■ 4 to 6 ■ 7 to 10

Producers with at least 20 employees (93%) and those in the horticulture industry (87%) are more likely than average (77%) to believe they have a high level of knowledge about biosecurity (rating 7 out of 10 or greater).

Producers who operate in the Taranaki, Manawatu-Wanganui, or Wellington regions (33%) are more likely than average (22%) to feel they have a lower understanding of biosecurity (rating less than 7 out of 10).

Source: U2

Base: All transport/distribution businesses (n=144), all producers (n=886)

Taking action on biosecurity

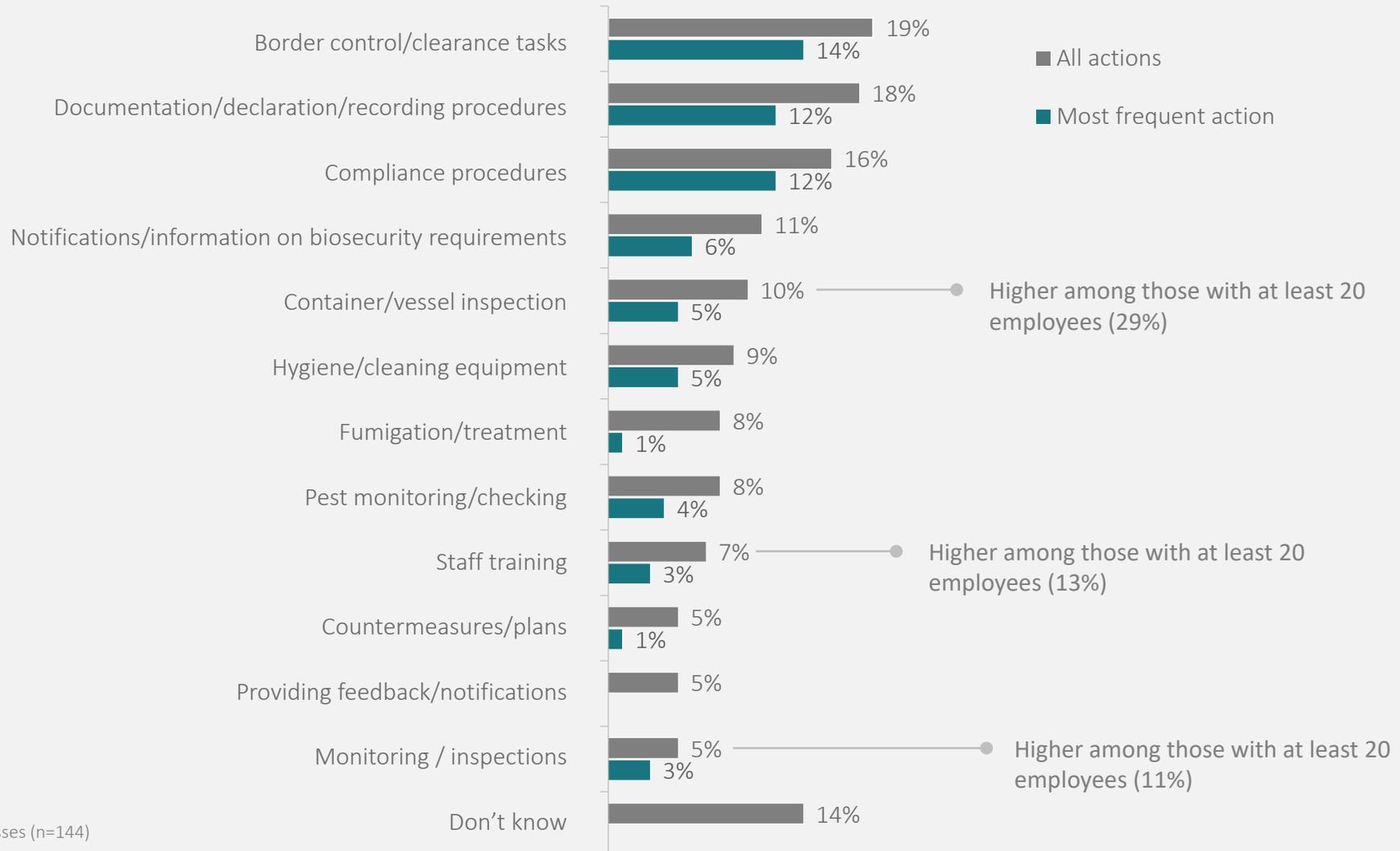


Biosecurity actions taken by transport and distribution businesses

The main biosecurity actions undertaken by transport and distribution businesses are border control tasks, documentation and compliance procedures. Note that no businesses said 'none' – but 14% said 'don't know'. It should be noted that findings are coded from an open-ended question.



What are the main biosecurity actions that your **transport/distribution** business undertakes?



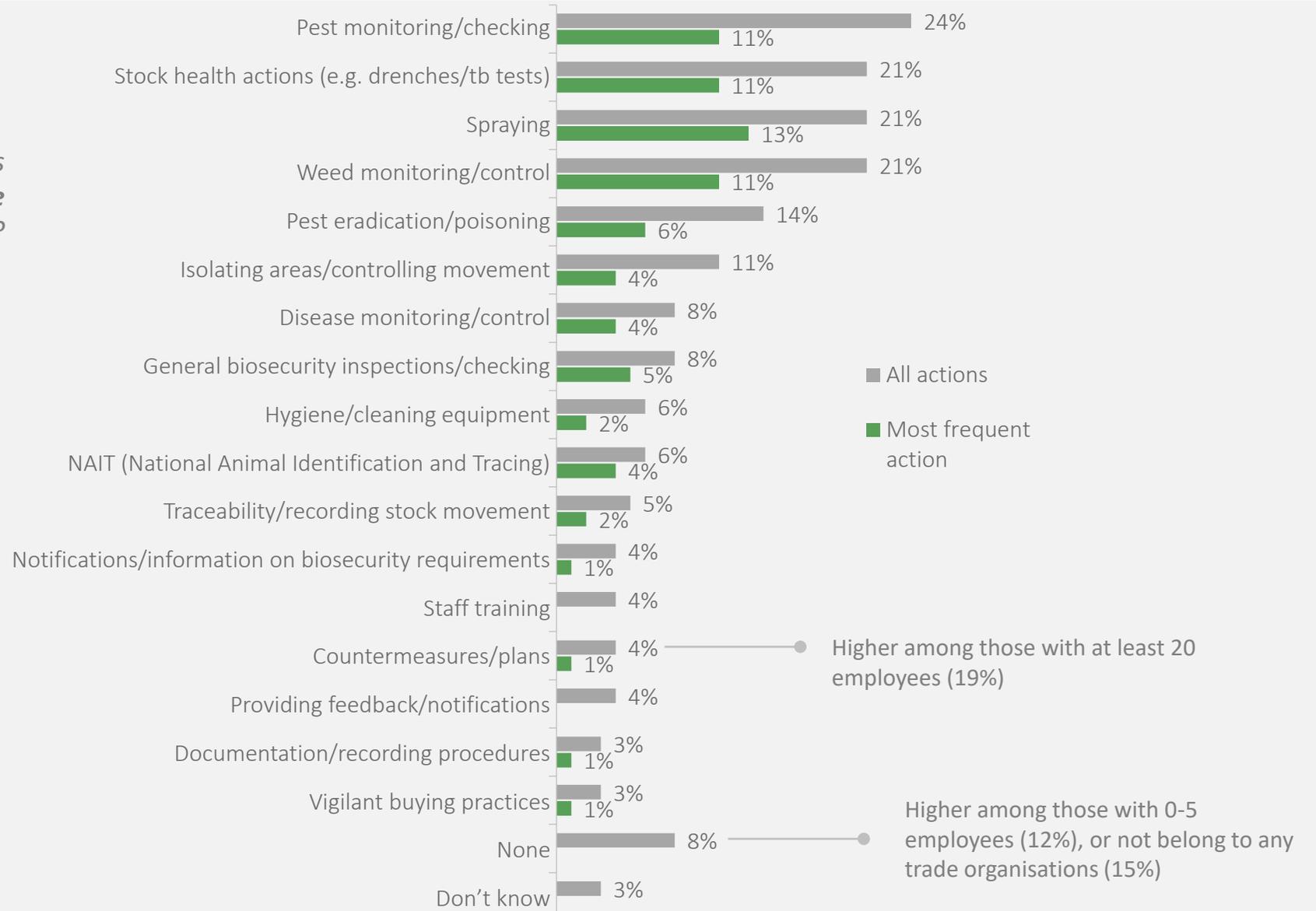
Source: A1
Base: All transport and distribution businesses (n=144)

Biosecurity actions taken by producers

The main actions undertaken by primary producers are pest monitoring, stock health actions, spraying, weed monitoring and pest eradication. Note that 8% of producers said 'none' and 3% said 'don't know'. It should be noted that the findings are coded from an open-ended question.



What are the main biosecurity actions that your **farming/primary produce** business undertakes?



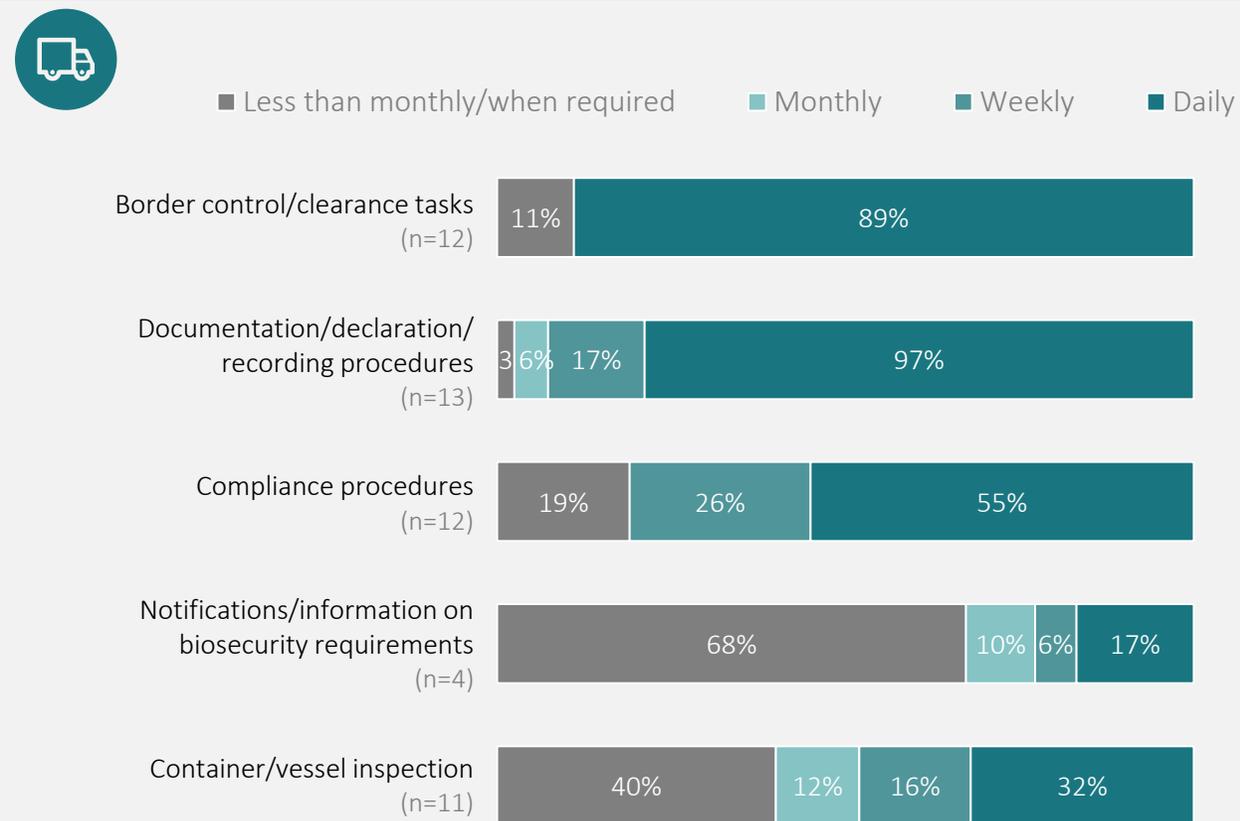
Source: A1
 Base: All producer businesses (n=886)

Frequency of biosecurity actions

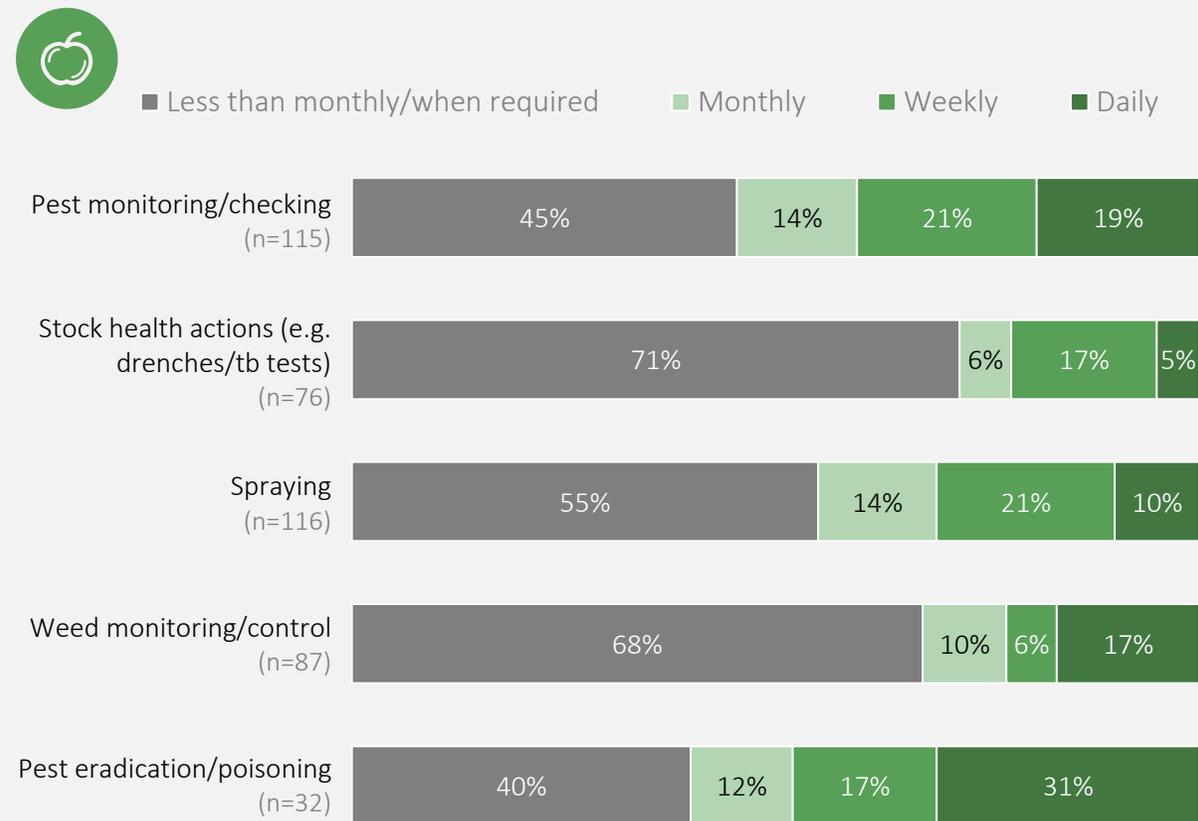
Most actions undertaken by transport and distribution businesses are very frequent ('daily' action is common). Whereas most actions undertaken by producers are relatively infrequent ('just whenever required' is common). Earlier, on Page 11, we assess how many businesses are 'active' in biosecurity (to inform the Biosecurity 2025 target). Only businesses undertaking actions with a degree of regularity count towards meeting in the target.

How often do you undertake your most frequent action? (Top 5 most common actions only)*

Transport/distribution†



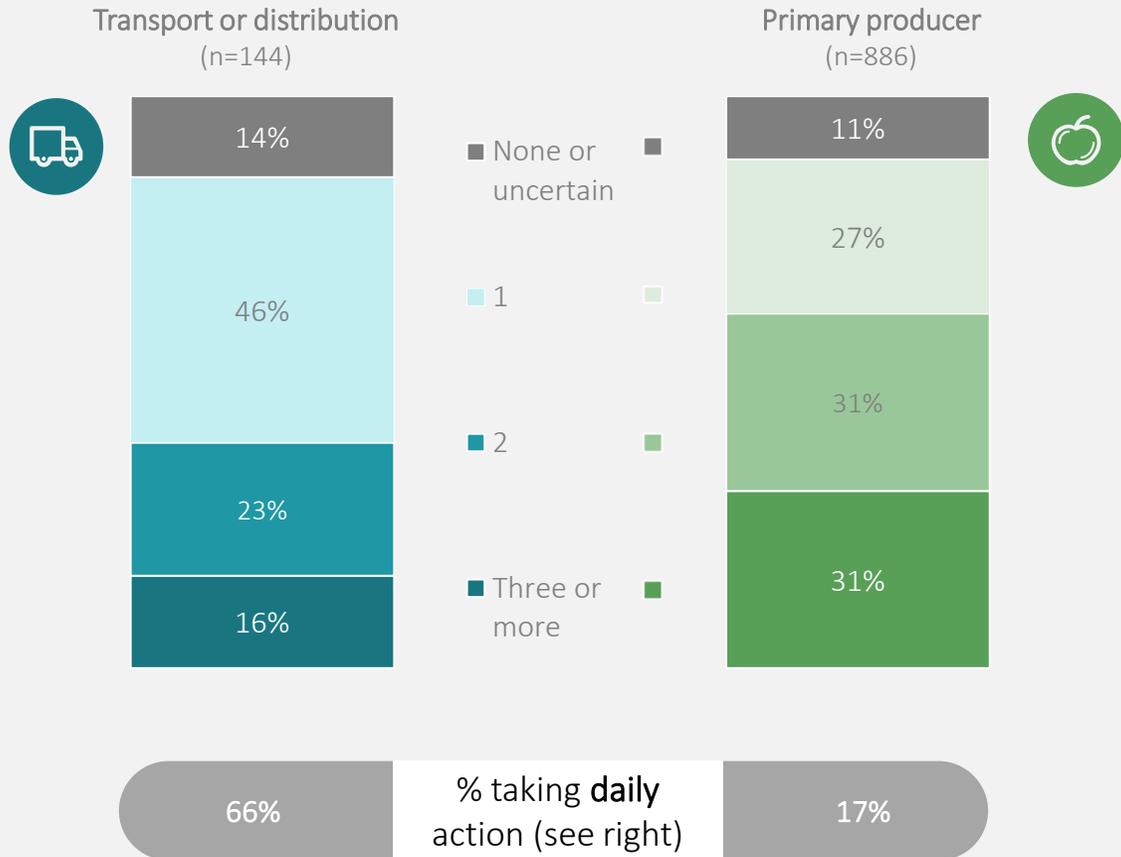
Primary producers



Number of biosecurity actions taken

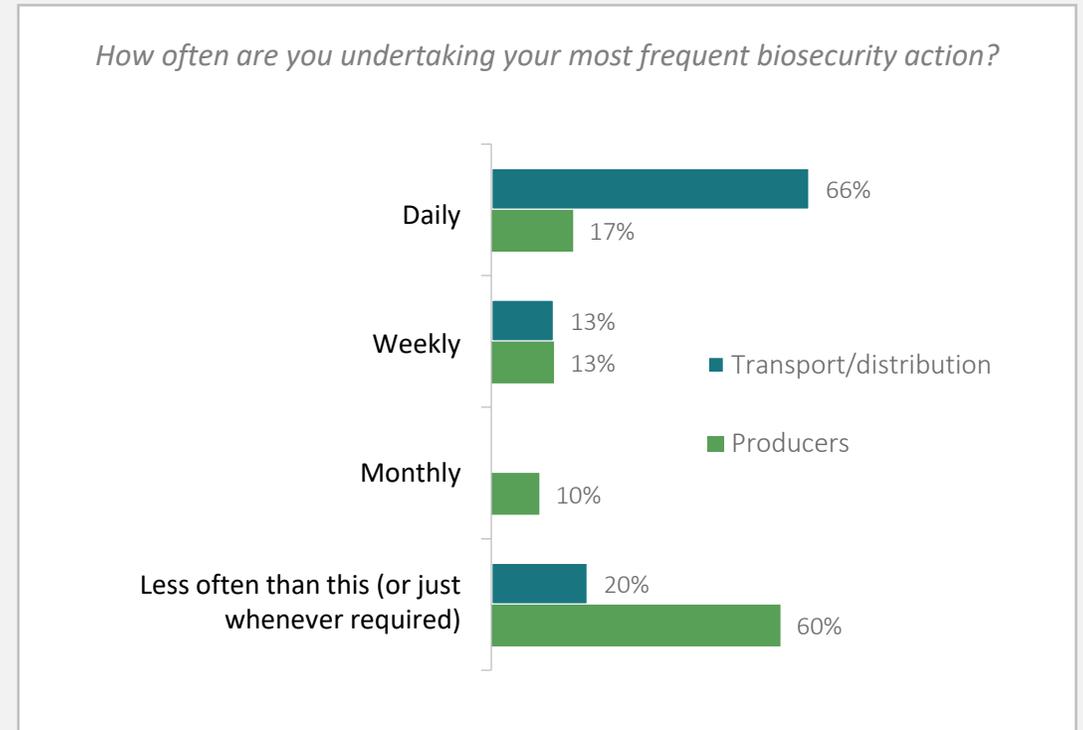
Transport/distribution businesses are involved in a relatively narrow range of actions (on average undertaking 1.5 different types of biosecurity actions) but on a frequent basis (two-thirds take action daily). In comparison, primary producers are involved in a larger range of actions (on average 2 different types of actions) but on a less frequent basis.

How many biosecurity actions do you undertake?



Source: A1
Base: All respondents. Refer to chart

How often are you undertaking your most frequent biosecurity action?



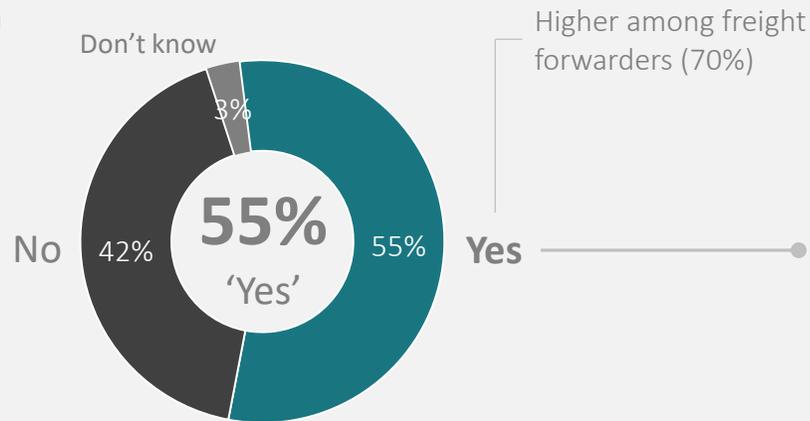
Source: A1b
Base: All businesses involved in biosecurity actions and could name a 'most frequent action' (n=735)

Biosecurity partnerships and collaborations

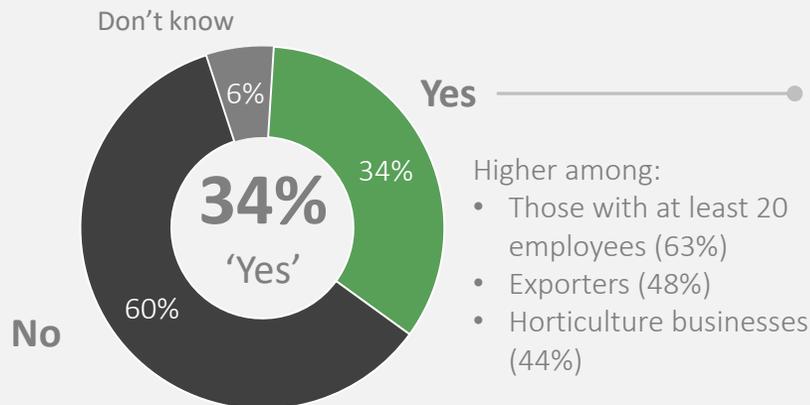
Over half (55%) of transport/distribution businesses have biosecurity partnerships or collaborations, compared to a third (34%) of producers. Partnerships and collaborations are often with other businesses in the supply chain. Transport/distribution businesses are more likely than average to have partnerships with suppliers and customers.

Does your business have biosecurity partnerships or collaborations with other organisations or businesses?

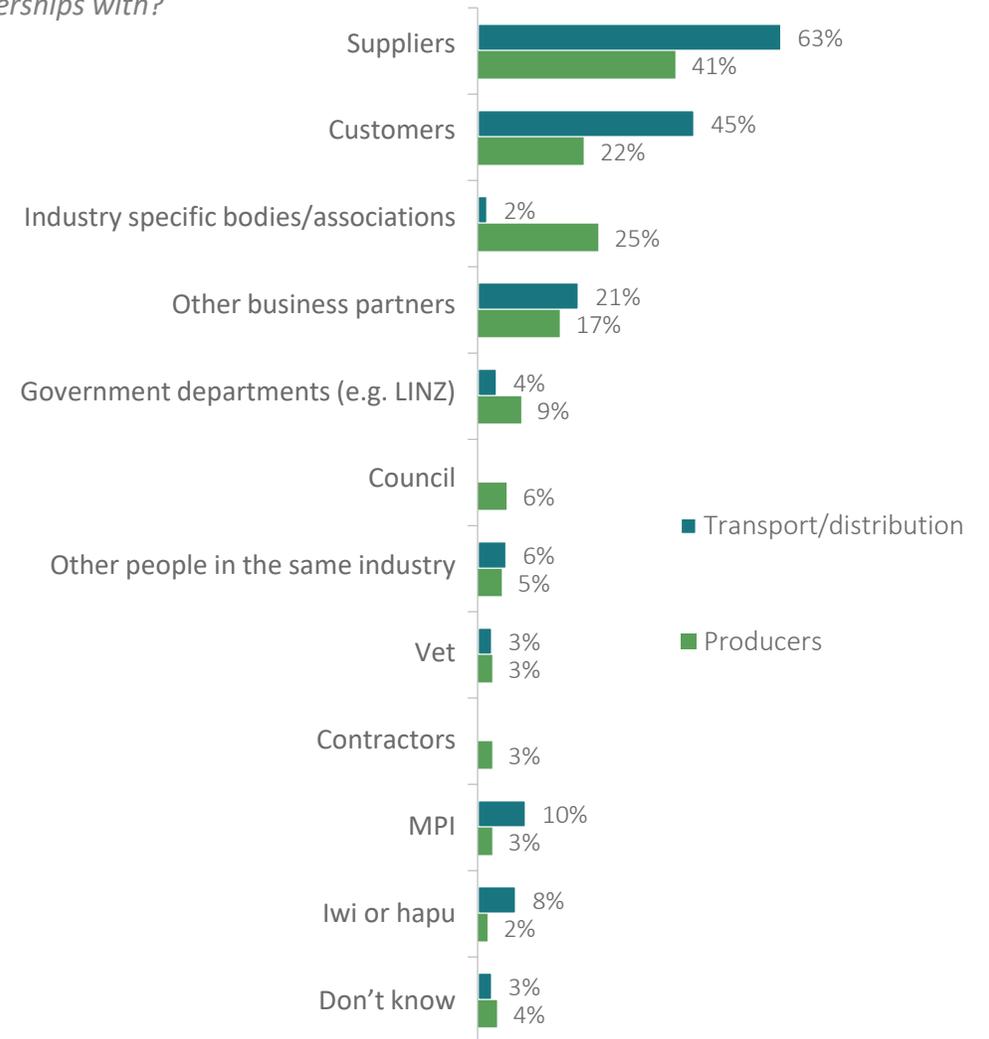
Transport/distribution



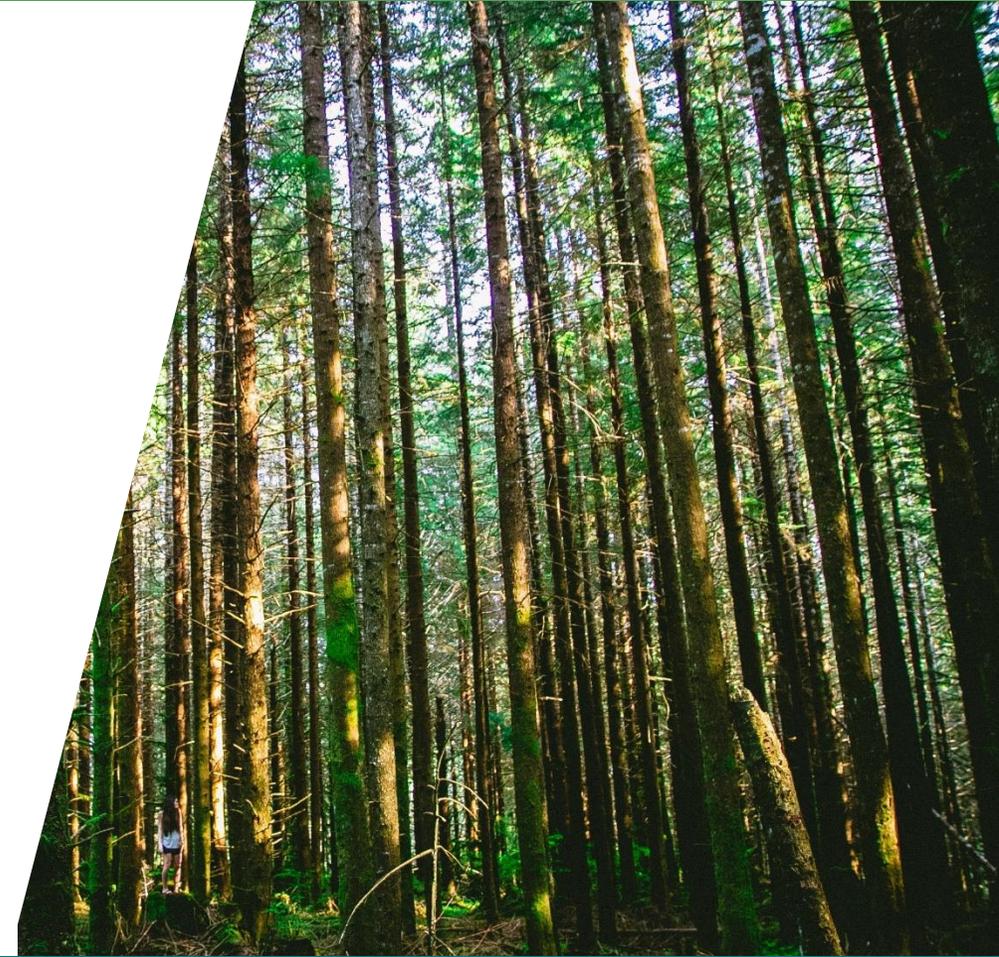
Producers



Who are these partnerships with?



Motivations



Unprompted motivations for biosecurity actions or partnerships: transport/distribution businesses

We asked, using an open-ended question for the main reasons for being involved in biosecurity actions or partnerships. Transport/distribution businesses are most likely to mention that biosecurity is essential to their daily business (30%) or that it's because they are importing goods (30%). Compliance (25%) is also a common reason given.



What are the main reasons that your business is involved in biosecurity actions or partnerships?

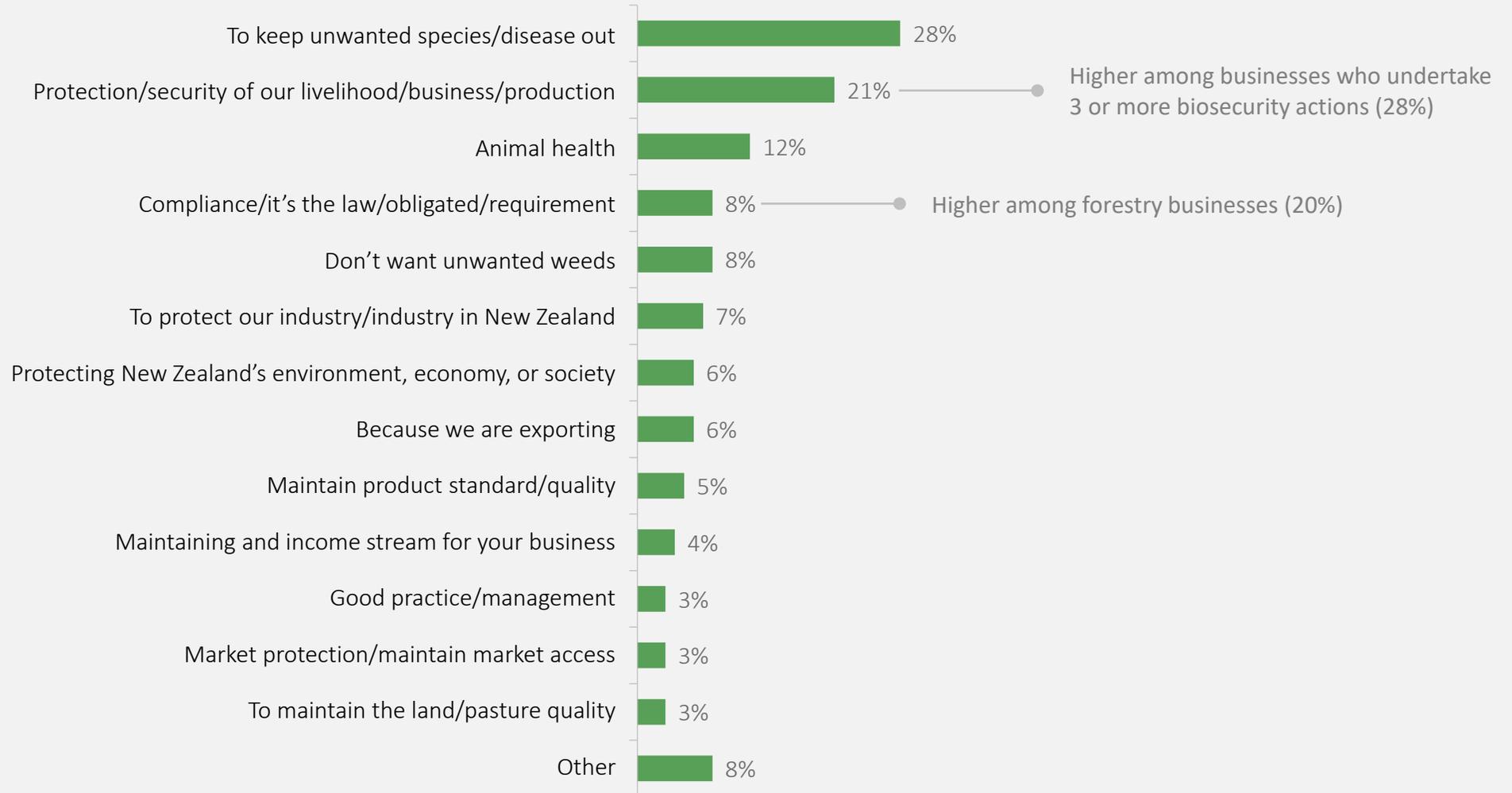


Unprompted motivations for biosecurity actions or partnerships: producers

Compared to transport/distribution businesses, producers motivations are more related to a desire to protect their livelihoods rather than compliance (though this is mentioned by 8% of this group). Six percent mention wanting to protect New Zealand's environment, economy, or society.



What are the main reasons that your business is involved in biosecurity actions or partnerships?



Some typical quotes from the open-ended question on motivations

“Just because we don't want to have any noxious weeds, pests or disease that will threaten our farming future”.

Livestock and horticulture farmer

“Weed control is for farm productivity purposes. Pest control is something we discuss with the council and helps for biodiversity reasons. Animal disease control has animal welfare purposes. All biosecurity has a connection with productivity”.

Livestock farmer

“Stop the animals getting sick and avoiding mass culling”.

Livestock farmer

“To protect the forest industry from all sorts of horrible things out there”.

Forestry producer

“It's part of our core business which is customs clearance. Customs is linked to MPI”.

Customs Agent

“I guess we have to be really focused because our product and farming methods are being scrutinized all the time especially because we are an export product. People all over the world want to know about our farming practices”.

Dairy farmer

“It is because we are a transitional facility, we check and pack all goods coming into and leaving NZ and hence we need to follow all biosecurity checks”

Freight forwarder

“If we don't manage it, we might not make a profit”.

Horticulture producer

“We are supposed to keep track of what comes and goes – we need to comply”.

Mail and courier company

Legend:

Producer



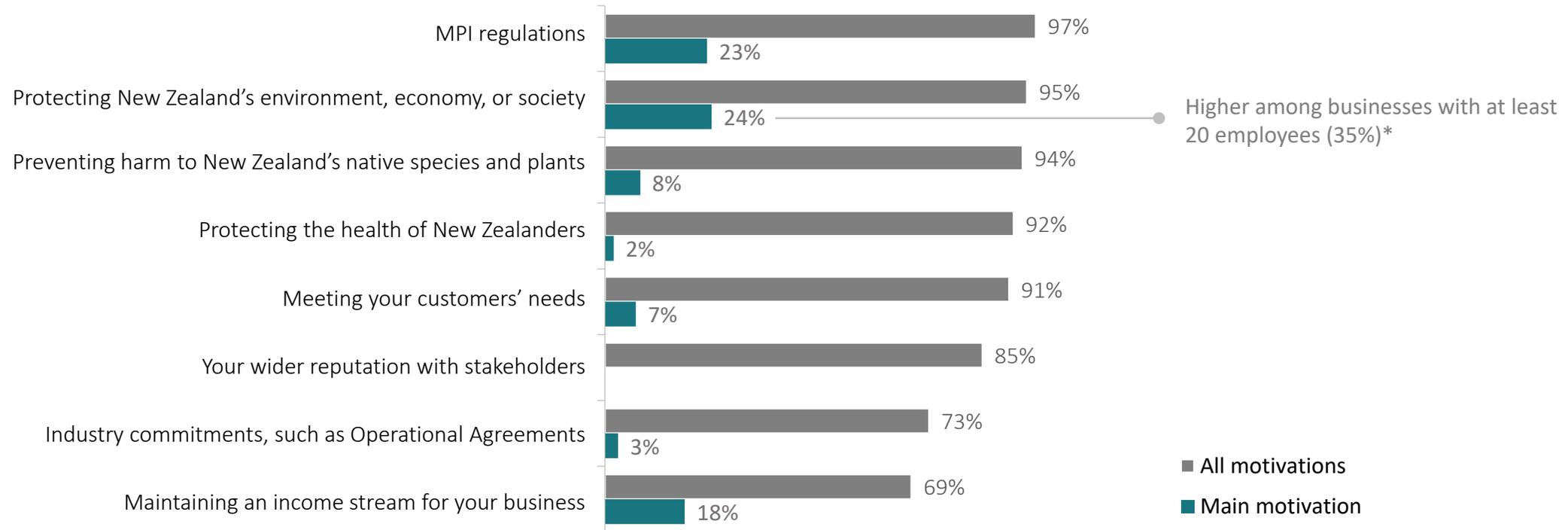
Transport/
distribution business



Prompted motivations for biosecurity actions: transport/distribution businesses

When prompted with a list of possible motivations, transport/distribution businesses often said that all the motivations were important. But when asked for the most important motivation, views were evenly split between protecting New Zealand (24%) and compliance with MPI regulations (23%). A number of transport/distribution businesses (18%) are mainly motivated by maintaining their income streams.

Which of these, if any, motivate your business' involvement in biosecurity?



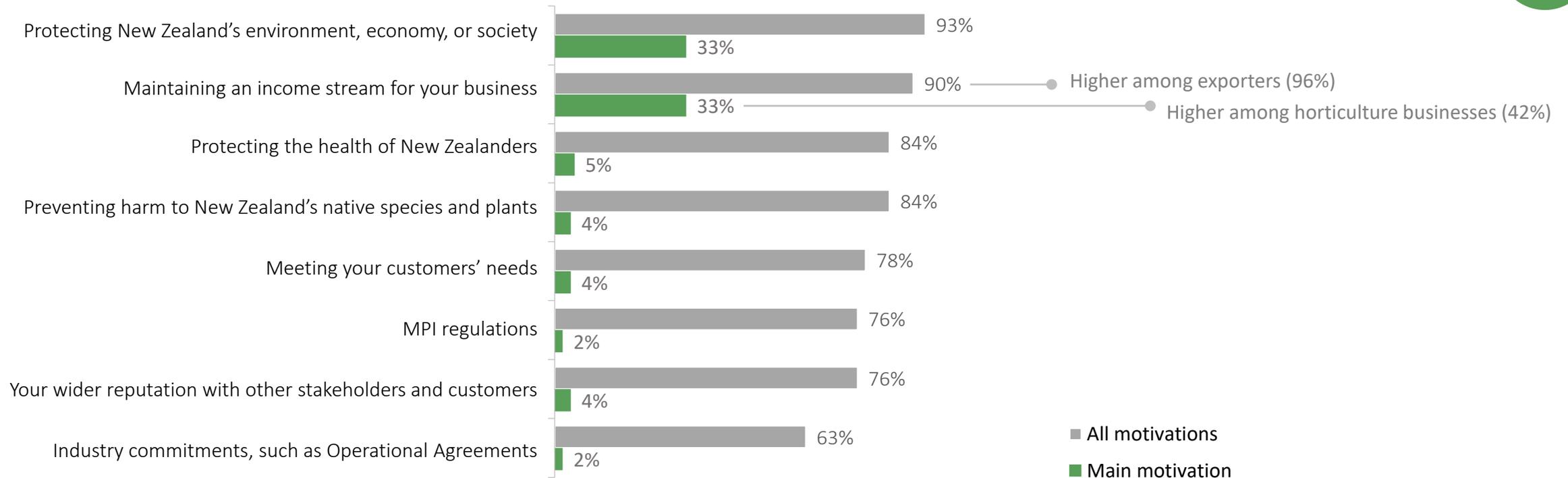
Source: M2 and M3

Base: Transport/distribution businesses that take biosecurity action or are in partnerships (M2, n=132; M3, n=128)

Prompted motivations for biosecurity actions: producers

Many producers that also say that all the motivations in the list are important. Their most important motivations are split between protecting New Zealand (33%) and maintaining their income streams (33%). Compliance with MPI regulations is not the main motivation for most producers (just 2% say it is).

Which of these, if any, motivate your business' involvement in biosecurity?



Source: M2 and M3
 Base: Producers that take biosecurity action or are in partnerships (M2, n=816; M3, n=785)

Identifying pests, weeds, and diseases and taking action

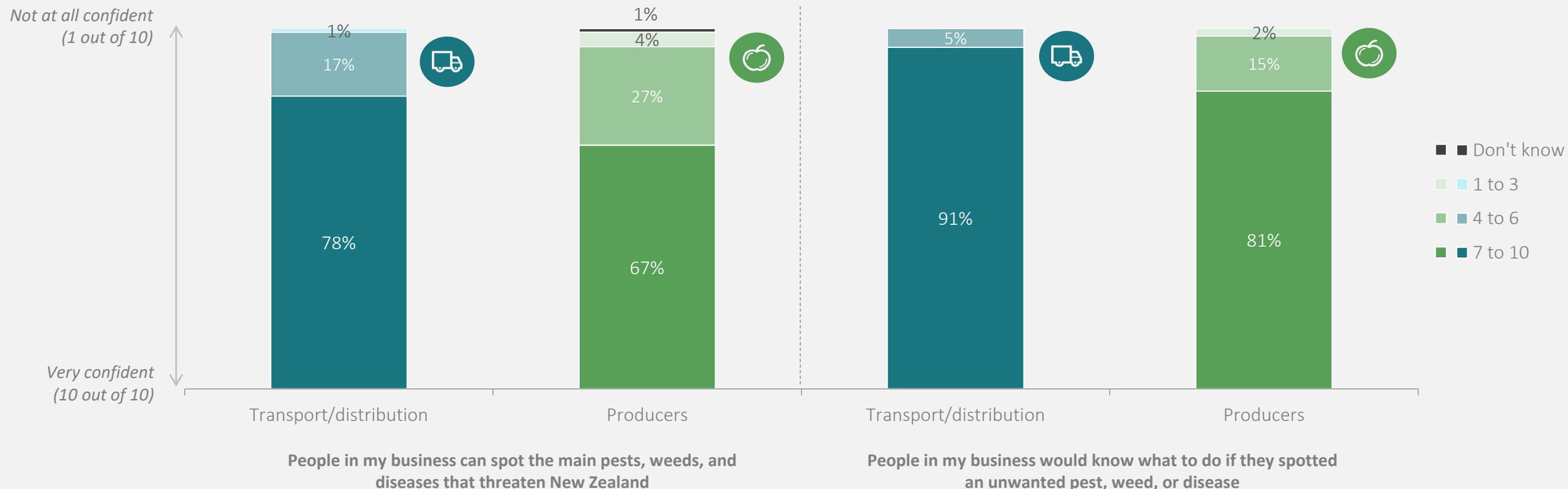


Confidence in identifying and dealing with pests, weeds, and diseases

Transport/distribution businesses tend to be very confident that people in the businesses can identify the main pests, weeds, and diseases that pose a risk to New Zealand (78% rate 7 to 10, where 10 is 'very confident) and that they know what they should do if they do spot an unwanted pest, weed, or disease (91% rate 7 to 10).

This is also true of producers, but they tend to be less confident than transport/distribution businesses on both measures.

How confident are you...?



Source: R1 and R2

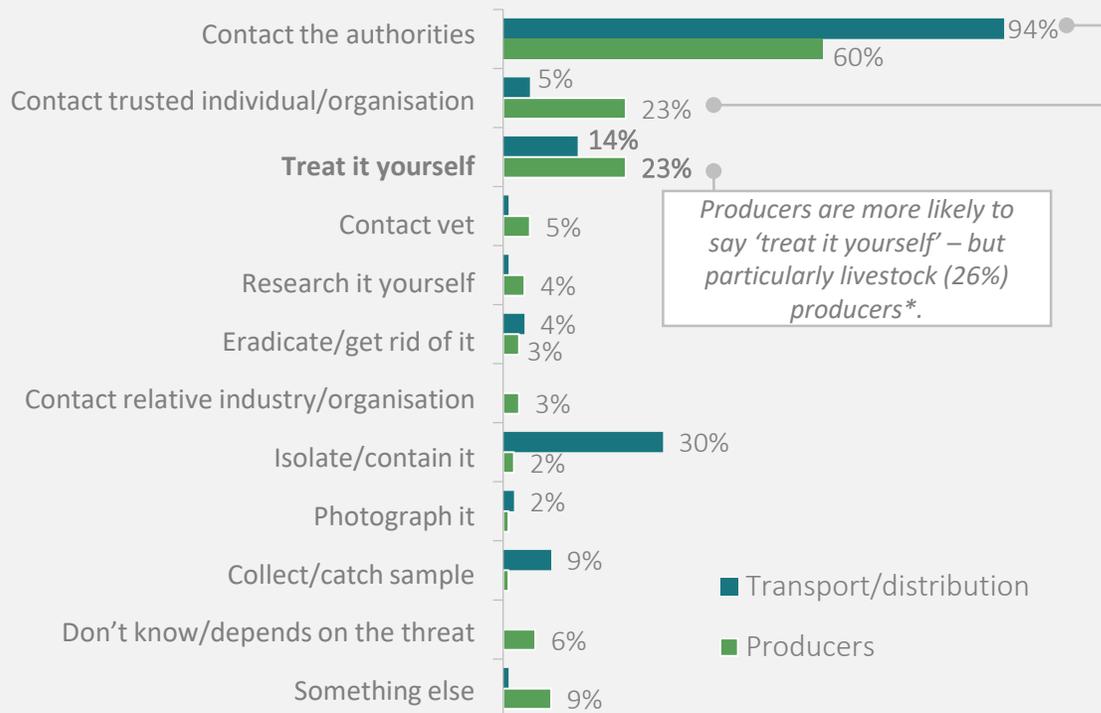
Base: Transport/distribution businesses (n=77) and producers (n=665) involved in spotting pests, weeds, or diseases

Anticipated reaction to spotting an unwanted pest, weed, or disease – industry breakdown

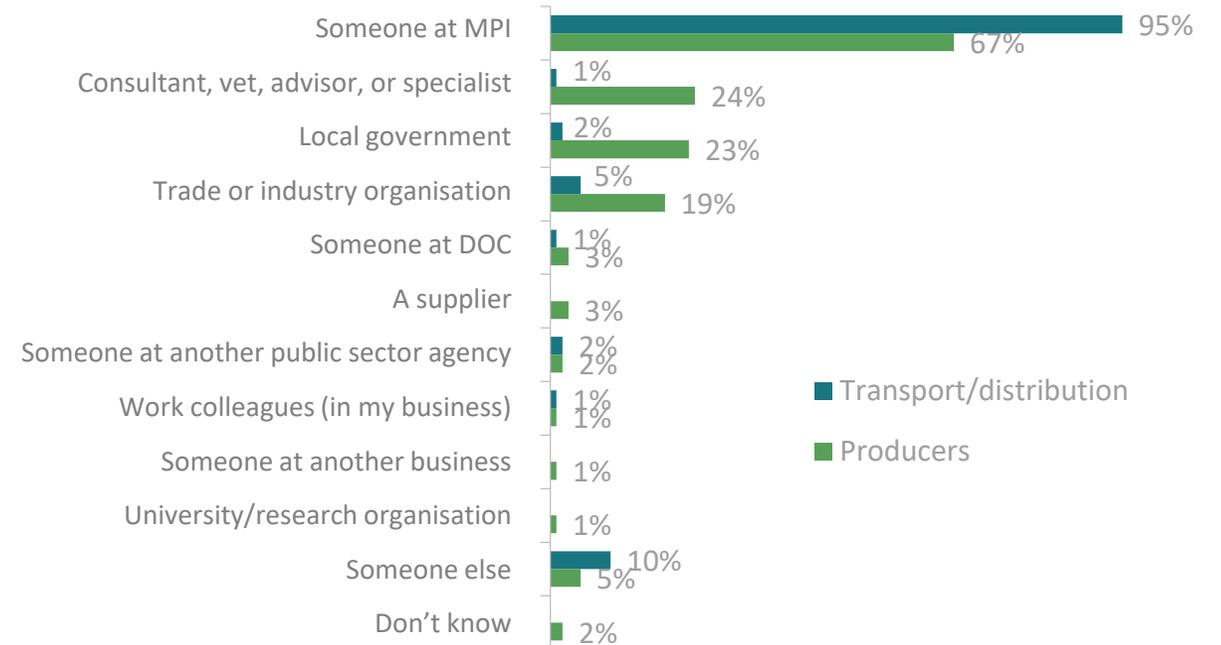
Most (94%) transport and distribution businesses would contact the authorities if they spotted a threat, compared to 60% of producers. They are also more likely than producers to say they would isolate or contain the threat (30% compared to 2%), but less likely to say they would contact a trusted organisation (5%, compared to 23%) or treat it themselves (14%, compared to 23%).

Nearly all transport and distribution businesses who would contact the authorities say they would reach out to MPI (95%, compared to 67% of producers).

If your business noticed an unwanted pest, weed, or disease tomorrow, would your first reaction be to...?



You mentioned you would contact the authorities/an individual or organisation you trust. Who would that be?



Source: R4

Base: Transport/distribution businesses (n=71) and producers (n=514) who would contact the authorities or an individual or organisation they trust

Source: R3

Base: Transport/distribution businesses (n=76) and producers (n=660) involved in spotting pests, weeds, and diseases

* There was also a slight tendency for small businesses to say this, but the difference was not statistically significant

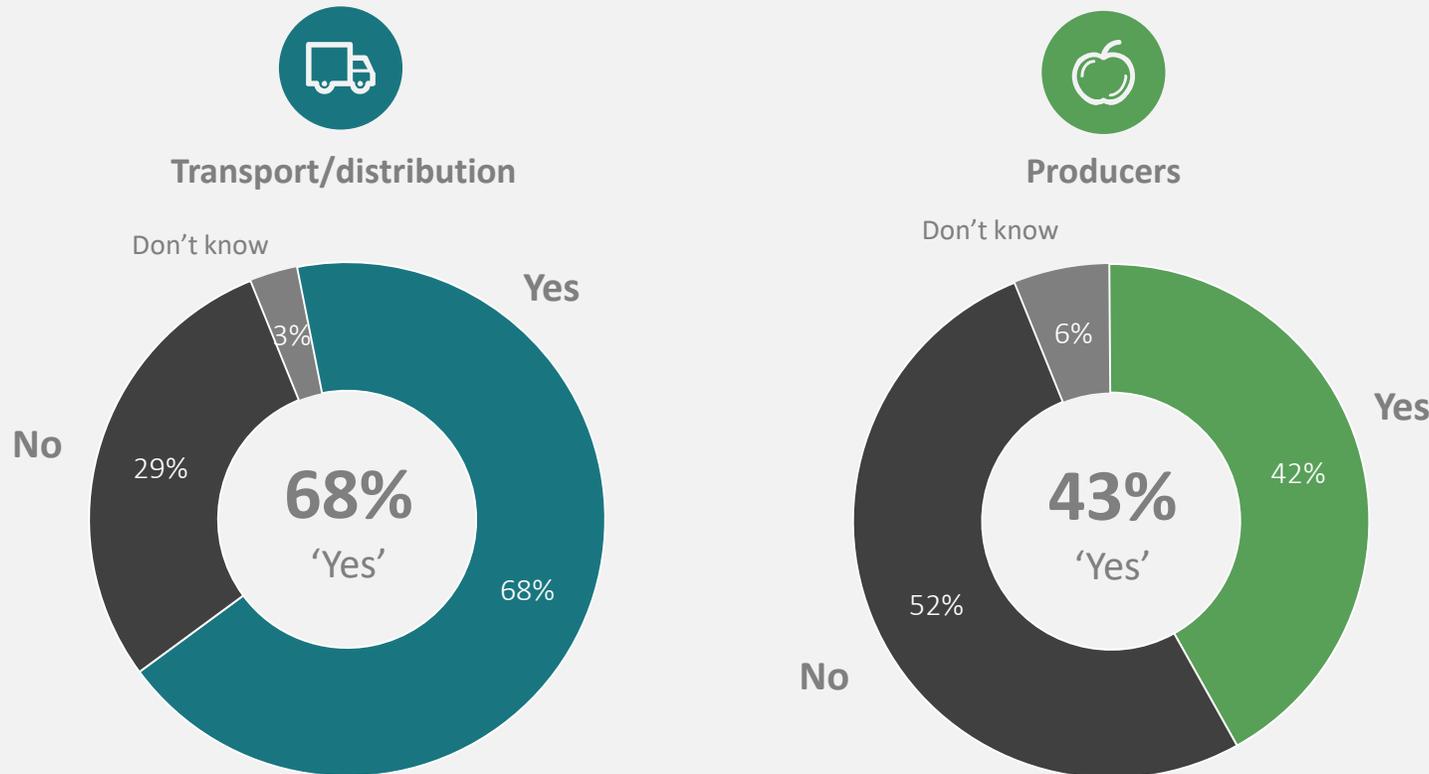
Biosecurity documents, processes, and communication with staff



Existence of biosecurity documents and written processes

Transport and distribution businesses are more likely to have biosecurity documents or processes compared to producers (68%, compared to 42%). (Earlier on page 11 we discuss how many businesses are meeting the Biosecurity 2025 target – having biosecurity documents and processes counts towards the target).

Does your business have any documents or written processes that include biosecurity?



Transport/distribution businesses with at least 20 employees (87%) are more likely than average (68%) to have biosecurity documents.

The following types of **producers** are more likely than average (43%) to have biosecurity documents:

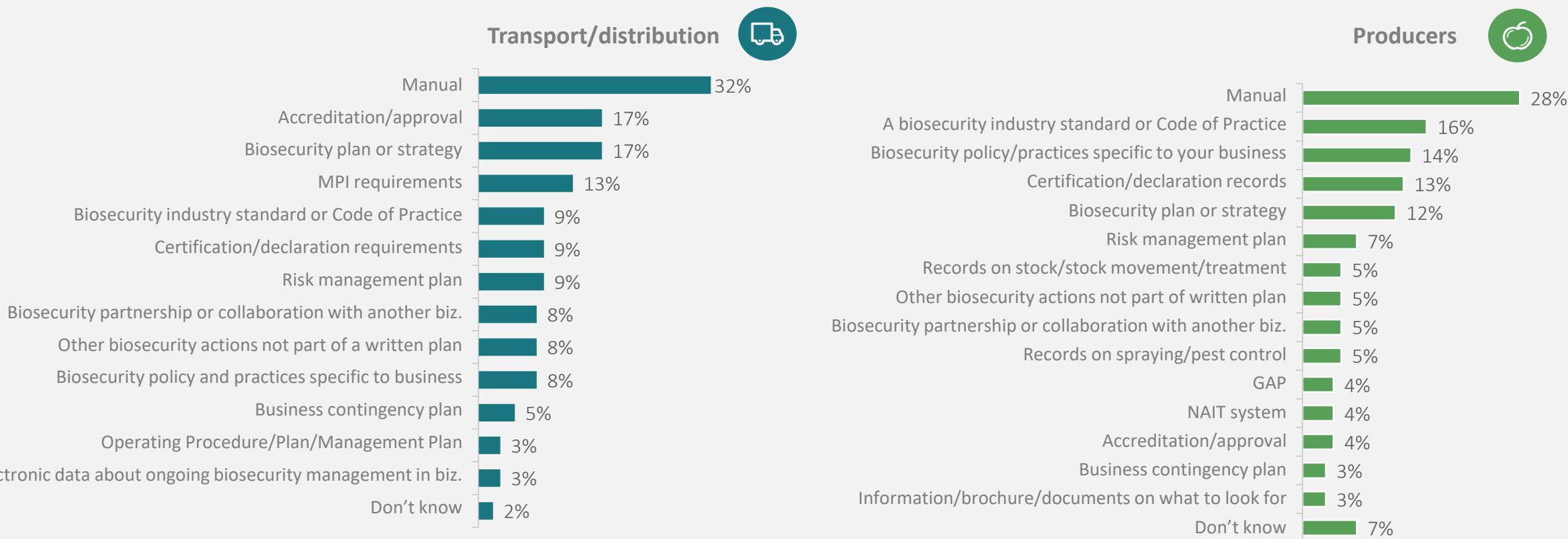
- Those with at least 20 employees (81%)
- Those who use road transport (57%)
- Horticulture businesses (55%)
- Exporters (55%)
- Those who undertake 3 or more biosecurity actions (50%)

Source: L1
Base: All transport/distribution businesses (n=144), all producers (n=886)

Types of biosecurity documents and written processes

Both transport/distribution businesses and producers who have biosecurity documents are most likely use a biosecurity manual (32% of transport/distribution businesses and 28% of producers). Written MPI requirements are much more common among transport/distribution businesses compared to producers (13% have them, compared to 1% of producers). They are also more likely to have accreditation or approval, such as Approved Transitional Facility Status (17%, compared to 4%).

What are these [documents or written processes that include biosecurity?]



Source: L2
 Base: Transport/distribution businesses (n=111) and producers (n=424) who have documents that include biosecurity
 Note: Items selected by less than 3% of businesses are not shown on the chart

Discussing biosecurity at management meetings

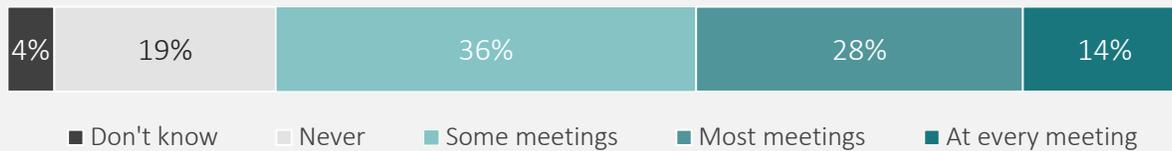
We asked businesses with management teams how often they discuss biosecurity at their meetings.

Transport and distribution businesses talk about biosecurity more often than producers – 28% of those with management teams discuss it at ‘most’ meetings and 14% at ‘every’ meeting (compared to 12% and 7% of producers with management teams respectively). Around half (53%) of producers with management teams discuss it at ‘some meetings’.

*How often does your management discuss biosecurity at their meetings?
(among businesses with management teams)*



Transport/distribution



Producers



The following types of **producers** are more likely than average (20%) to discuss biosecurity at ‘most’ or ‘every’ management meeting:

- Businesses with at least 20 employees (40%)
- Businesses who use road transport (37%)
- Exporters (30%)
- Horticulture businesses (27%)

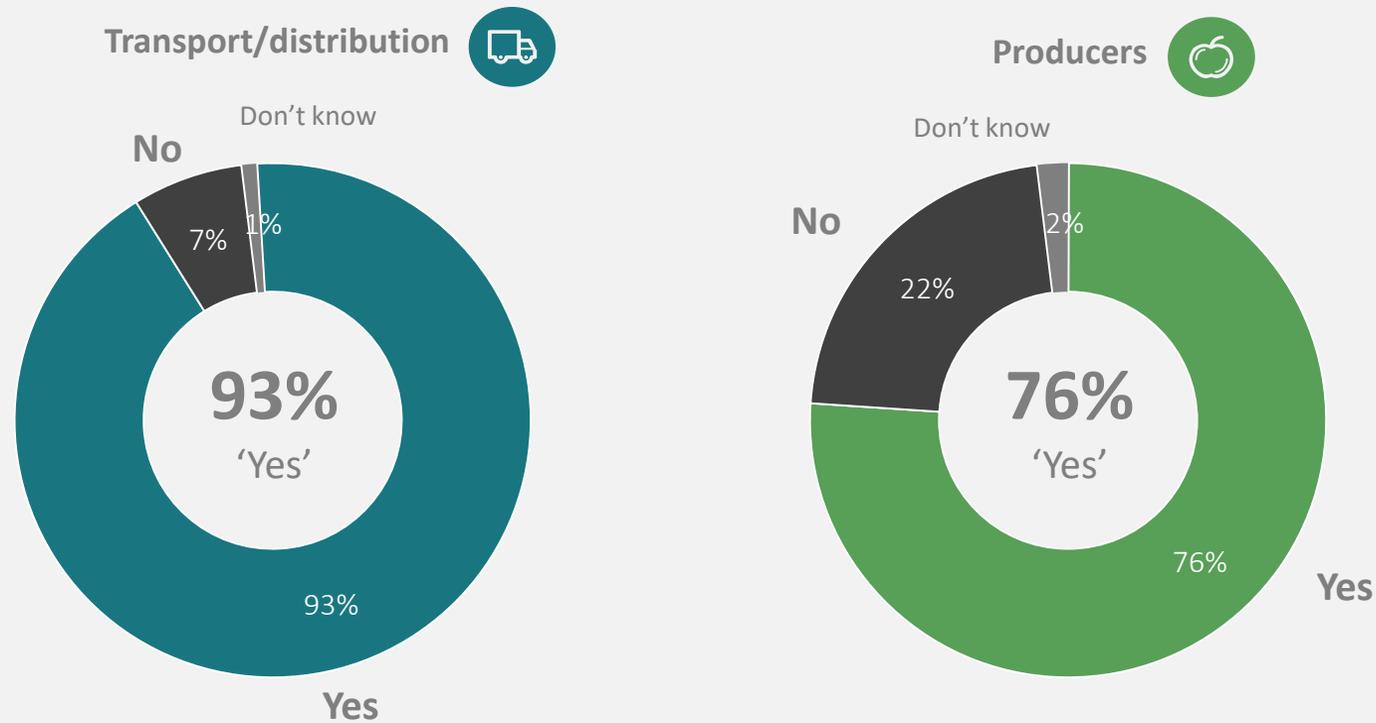
Source: L3

Base: Transport/distribution businesses (n=133) and producers (n=636), excluding ‘Not relevant’ (i.e. don’t have management teams)

Communicating with staff about biosecurity

We asked businesses with staff if they communicate with 'relevant staff' about biosecurity. Nearly all (93%) transport/distribution businesses with staff communicate with them about biosecurity, compared to 76% of producers with staff.

Does your business communicate with relevant staff in your business about biosecurity?
(among businesses with staff)



The following types of **producers** are more likely than average (76%) to communicate with staff about biosecurity:

- Businesses with at least 20 employees (92%)
- Horticulture businesses (88%)
- Those who undertake 2 or more biosecurity actions (85%)

Source: L5
Base: Transport/distribution businesses (n=136) and producers (n=627), excluding 'Not relevant' (i.e. don't have staff)

Communicating with staff about biosecurity: transport/distribution businesses

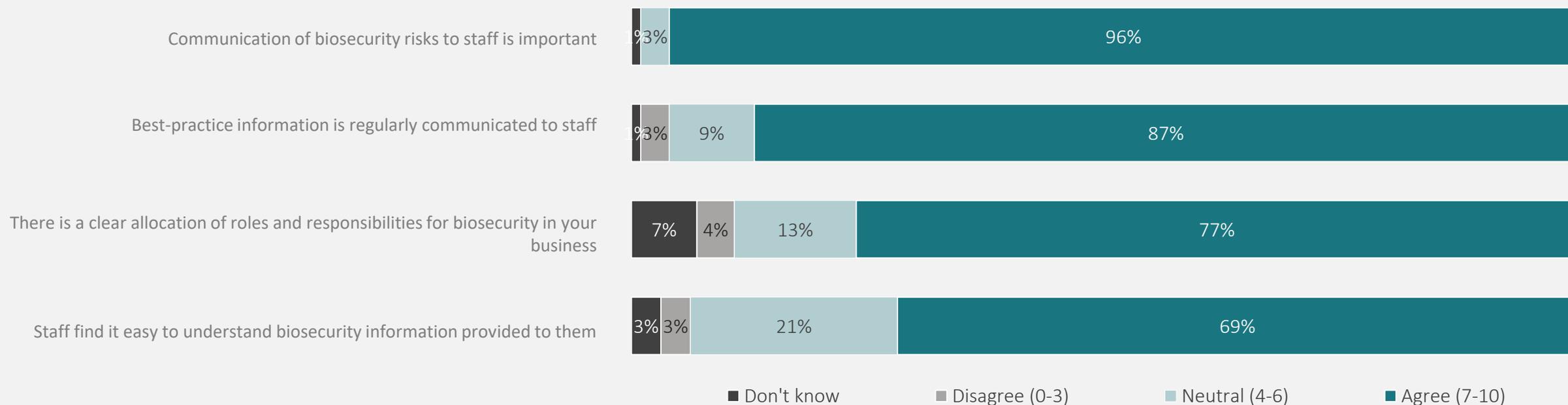
Most transport/distribution businesses that communicate with staff about biosecurity agree that communication is important (96% rate '7' to '10' out of 10 where 10 means 'strongly agree'). Nearly 9 in 10 (87%) of these businesses say that best practice information is regularly communicated to relevant staff, whilst 8 in 10 (77%) say that there is a clear allocation of roles and responsibilities for biosecurity in their business, and 7 in 10 (69%) think that relevant staff find it easy to understand biosecurity information provided to them.

Businesses with at least 20 employees are more likely than average to agree that there is a clear allocation of roles (92%) and that staff find it easy to understand biosecurity information (82%).



To what extent do you agree or disagree with the following statements about the communication of biosecurity to relevant staff in your business?

(from '0 – Strongly disagree' to '10 – Strongly agree')



Source: L6

Base: Transport/distribution businesses who communicate with relevant staff about biosecurity (n=127)

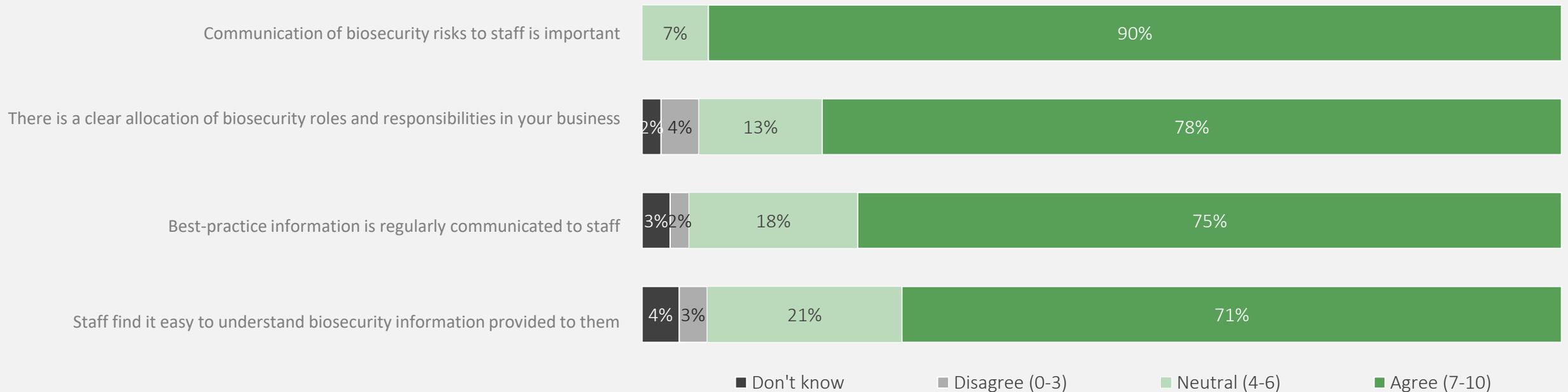
Communicating with staff about biosecurity: producers

Most (90%) producers who communicate with staff about biosecurity also agree that communication is important. At least 7 in 10 believe that there is a clear allocation of biosecurity roles in their businesses, that best-practice information is regularly communicated to staff, and that staff find it easy to understand biosecurity information.

There are no differences of interests among sub-groups of producers.

To what extent do you agree or disagree with the following statements about the communication of biosecurity to relevant staff in your business?

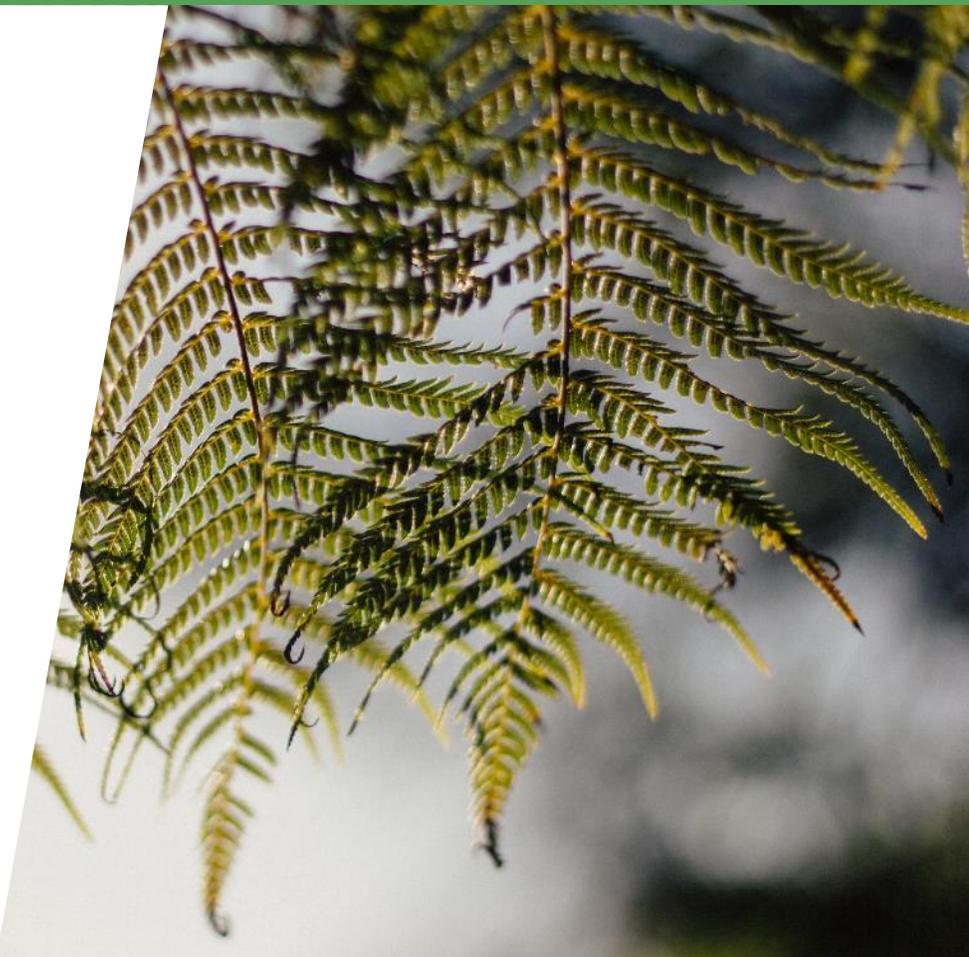
(from '0 – Strongly disagree' to '10 – Strongly agree')



Source: L6

Base: Producers who communicate with relevant staff about biosecurity (n=514)

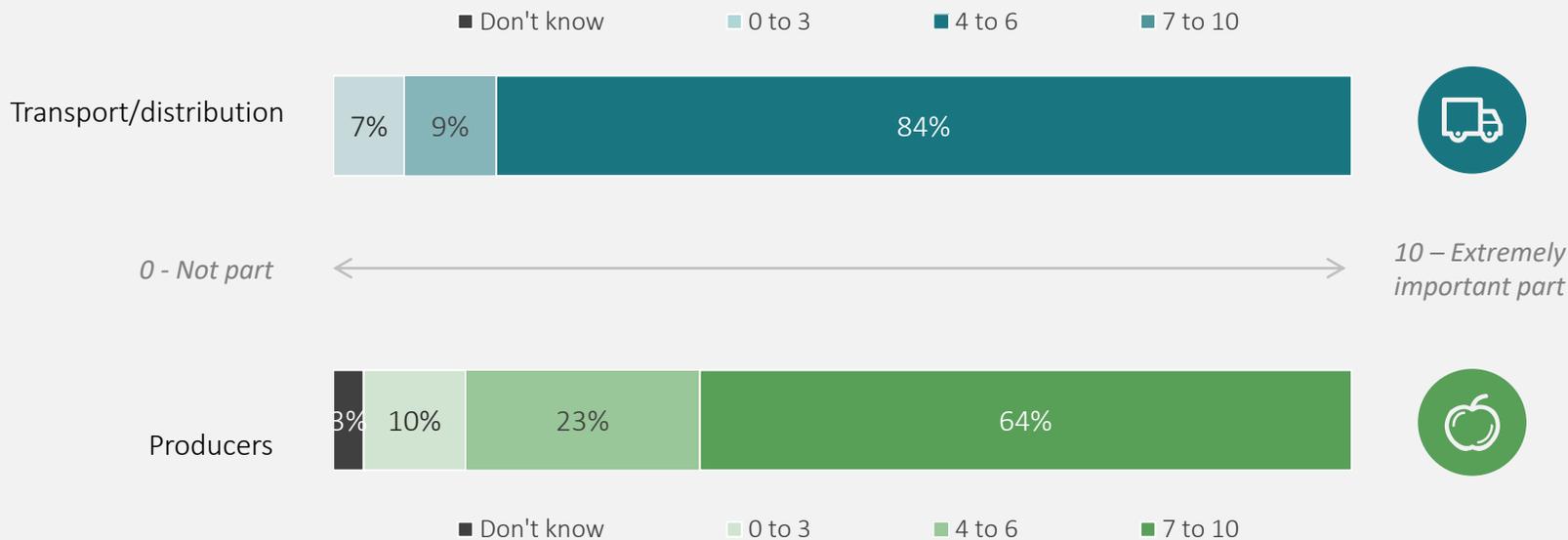
The wider biosecurity system



Businesses as part of the wider biosecurity system

Businesses generally feel that they play some part in the wider biosecurity system. Transport and distribution businesses are more likely than producers to feel they are a part of the wider system (84% rate '7' to '10', compared to 64% of producers).

To what extent do you consider your business to be part of New Zealand's wider biosecurity system?
(From '0 – You are not part' to '10 – You are an extremely important part')



Producers who export (85%) are more likely than average (64%) to consider their businesses to be an important part of the wider biosecurity system.

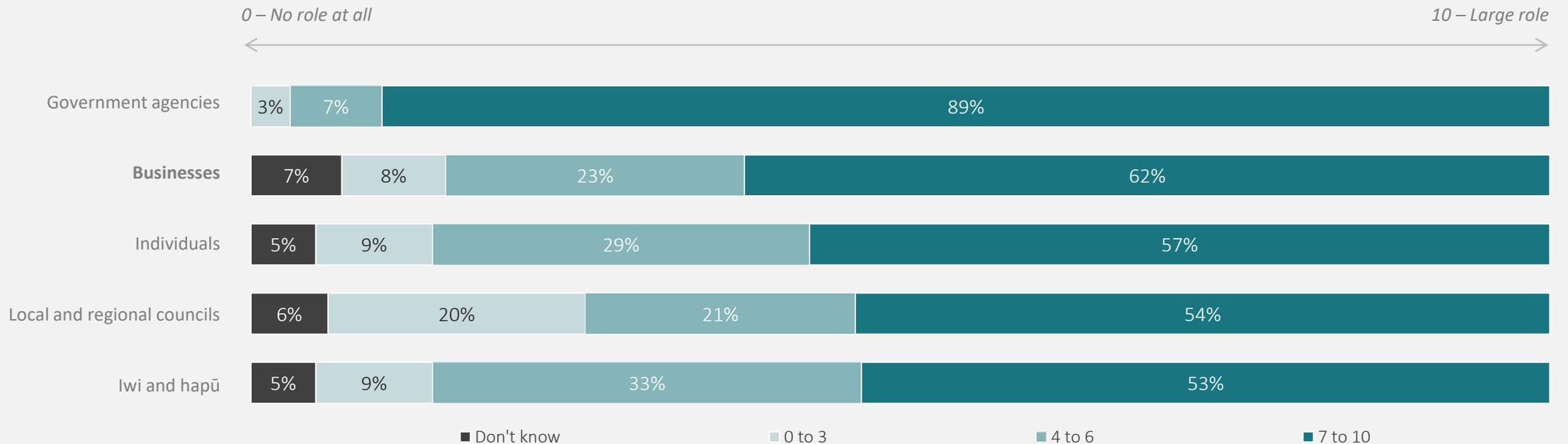
Source: Sys2
Base: All transport/distribution businesses (n=144), all producers (n=886)

Roles in the biosecurity system: transport and distribution businesses

Transport/distribution businesses tend to view government agencies as playing the largest role in biosecurity. Nine in ten (89%) rate government's role between '7' and '10' where 10 means 'a large role'. This compares to 62% who rate the role of businesses between '7' and '10'. These businesses perceive themselves as playing a similar role to individuals (57% rate individuals' role between '7' and '10').



How much of a role do you think each of the following agencies or organisations play in helping to protect New Zealand from the entry or spread of pests, weeds, and diseases?
(from '0 – No role at all' to '10 – A large role')



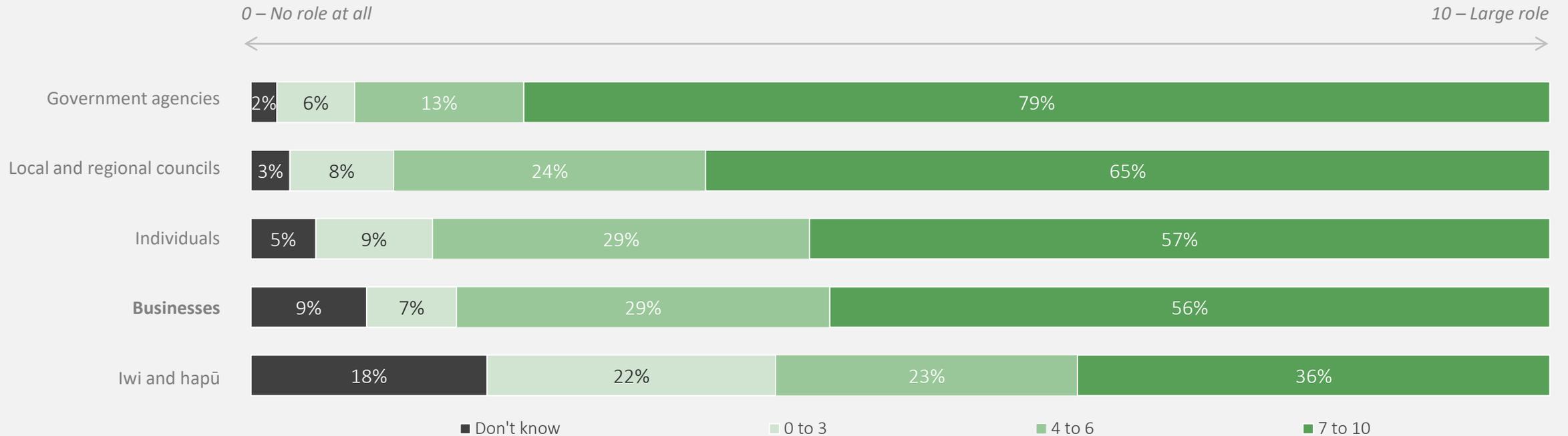
Source: Sys4
Base: All transport/distribution businesses (n=144)

Roles in the biosecurity system: producers

Like transport/distribution businesses tend to view government agencies as playing the largest role in biosecurity. Nine in ten (79%) rate government’s role between ‘7’ and ‘10’ where 10 means ‘a large role’. Producers see businesses as playing a similar role to individuals, though they tend to see local government playing a greater role than themselves (65% rate 7 to 10 for local and regional councils, compared to 56% for businesses). Forestry (80%) and horticulture (64%) businesses are more likely than average to see businesses as playing a large role.



How much of a role do you think each of the following agencies or organisations play in helping to protect New Zealand from the entry or spread of pests, weeds, and diseases?
(from ‘0 – No role at all’ to ‘10 – A large role’)



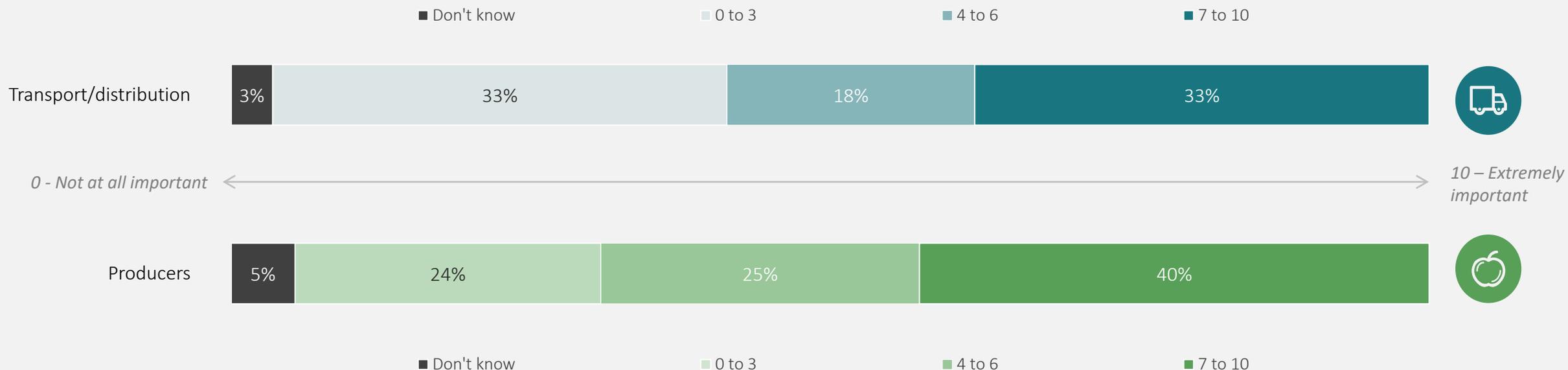
Source: Sys4
Base: All producers (n=886)

Working with Māori and understanding Māori values in relation to biosecurity

Views on the importance of working with Māori and understanding Māori values in relation to biosecurity are mixed. Two in five (40%) producers and 33% of transport/distribution businesses rate '7' to '10' where 10 means 'extremely important'.

Transport/distribution businesses with at least 20 employees (47%) are more likely than average (33%) to believe that working with and understanding Māori is important.

How important is it that biosecurity leaders and professionals in your business are able to work with Māori and understand Māori values in relation to biosecurity?
(From '0 – Not at all important' to '10 – Extremely important')



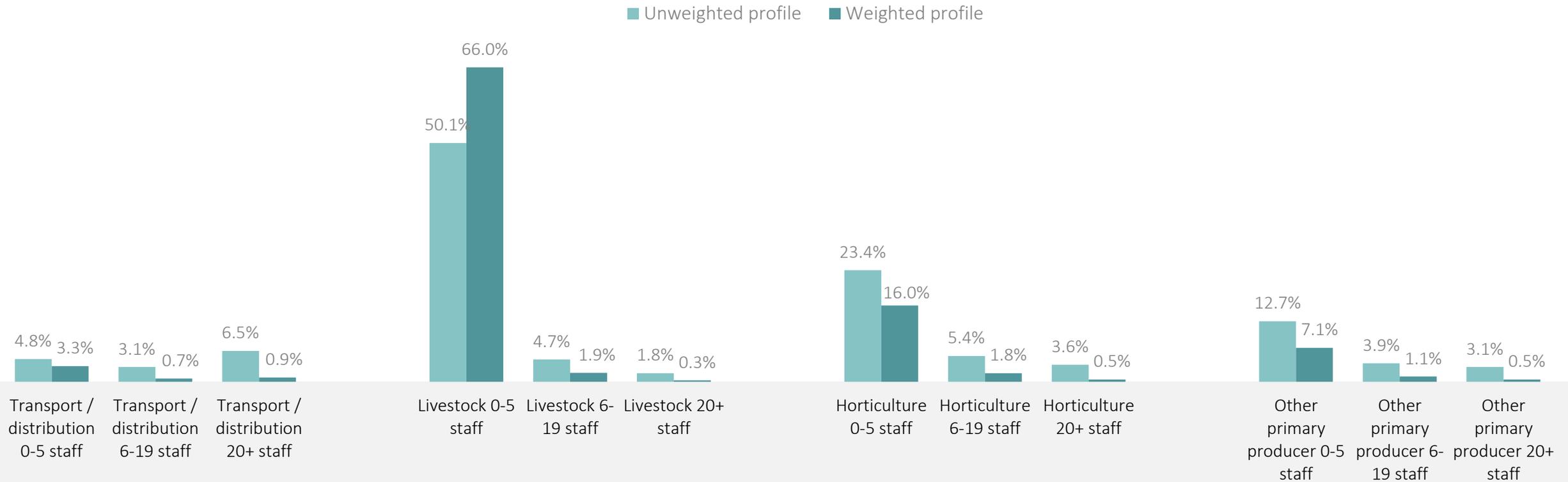
Source: Sys5
Base: All transport/distribution businesses (n=144), all producers (n=886)

Appendix: Sample profile and methodology report



Unweighted vs. weighted profile (weighted to Statistics New Zealand business demographics)

Note that Stats NZ has a single industry code per business, whereas we allowed industries to multi-code (i.e. choose more than one industry) – which is why the total weighted profile adds up to more than 100%.



Transport/distribution includes: international freight/passenger by air or water, customs agents/freight forwarders, and mail/courier companies transporting/mailling internationally.

Livestock includes farming: dairy cattle, beef, sheep, pigs, deer, goats, poultry meat/eggs, grain-sheep/grain-beef.

Horticulture includes growing: grain, arable, vegetable, mushroom, fruit, grapes, tree-nuts, nursery or floriculture.

Other primary includes: forestry, honey or bee production, aquaculture or fish farming, or other primary producer not specified elsewhere.

Methodology (i)

Sampling and weighting

- The survey includes two groups of relevant businesses:
 - transport/distribution businesses involved in transporting freight, passengers and/or cargo internationally (referred to as ‘transport/distribution’ businesses in this report).
 - primary producers (referred to as ‘producers’ in this report).
- Please note that a small number of businesses (30) were both transport/distribution businesses and producers (this small group are included in graphics/figures for both sets of businesses).
- A random sample of businesses across both sectors would result in less than 5% of the interviews being conducted with the transport/distribution sector. We took a deliberate decision to up-weight this sector’s probability of selection in the sample by about triple. This meant that 144 interviews were conducted with this sector due to disproportionate stratification. The remainder of interviews were with producers.
- A random sample of businesses across both sectors would result in less than 6% of the interviews being conducted with medium businesses (with 6-19 staff) and less than 3% of the interviews being conducted with large businesses (with 20+ staff). We took a deliberate decision to up-weight medium and large businesses (we increased the probability of selection in the sample by just over double for medium businesses and by about six-fold for large businesses). This meant that 259 interviews were conducted with medium and large businesses due to disproportionate stratification. The remainder of interviews were with small businesses (with 0-5 staff).
- Please note that during the interview we did not attempt to single-code industry (instead businesses could multi-code their industry if they fell into more than one category).
- The data was post-weighted to ensure the total sample is broadly representative of the New Zealand business population by size and sector (including a representative spread of businesses involved in international transport/distribution and primary producers). The sampling and weighting groups can be found in the previous slide. This involves substantial up-weighting of small businesses and livestock businesses. The size/sector weighting targets (referred to in the previous slide as ‘weighted profile’) were sourced from Statistics New Zealand business demographics. The weighting took into account multi-coding of industry through a series of high level industry rim weights (such as ‘live-stock’ vs ‘not-livestock’ by size-band).
- Contact records for businesses were sourced from Inivio and Martins (both are suppliers of targeted business lists and provided contact records for the detailed sub-sector specified at the bottom of the previous slide).

Methodology (ii)

Fieldwork

- Fieldwork was conducted between 28 November 2017 to 9 February 2018.
- Six calls were made to each contact on different days of the week and at different times of day until a final fieldwork outcome was reached for each piece of sample.
- A final response-rate of 43% was obtained.
- At each business we asked to speak with the Operations Manager (or 'the owner' in small businesses).
- Interviews lasted 15 minutes on average.

Analysis

- Analysis was conducted using SPSS and SPSS Report for Surveys software.
- Coding of free-text was conducted manually (using research supervision of in-house coding staff who analysed all open-ended questions and other-specify questions).
- Any differences in the report between sub-groups and the average are statistically significant at the 95% confidence level (unless otherwise specified).



FOR MORE INFORMATION, PLEASE CONTACT:

Ian Binnie or Tim Hannan

Colmar Brunton, a Kantar Millward Brown Company
Level 9, Legal House, 101 Lambton Quay, Wellington
PO Box 3622, Wellington 6140

Phone (04) 913 3007, (04) 913 3003
Ian.Binnie@colmarbrunton.co.nz, Tim.Hannan@colmarbrunton.co.nz



IMPORTANT INFORMATION

Research Association NZ Code of Practice

Colmar Brunton practitioners are members of the Research Association NZ and are obliged to comply with the Research Association NZ Code of Practice. A copy of the Code is available from the Executive Secretary or the Complaints Officer of the Society.

Confidentiality

Reports and other records relevant to a Market Research project and provided by the Researcher shall normally be for use solely by the Client and the Client's consultants or advisers.

Research Information

Article 25 of the Research Association NZ Code states:

- a. The research technique and methods used in a Marketing Research project do not become the property of the Client, who has no exclusive right to their use.
- b. Marketing research proposals, discussion papers and quotations, unless these have been paid for by the client, remain the property of the Researcher.
- c. They must not be disclosed by the Client to any third party, other than to a consultant working for a Client on that project. In particular, they must not be used by the Client to influence proposals or cost quotations from other researchers.

Publication of a Research Project

Article 31 of the Research Association NZ Code states:

Where a client publishes any of the findings of a research project the client has a responsibility to ensure these are not misleading. The Researcher must be consulted and agree in advance to the form and content for publication. Where this does not happen the Researcher is entitled to:

- a. Refuse permission for their name to be quoted in connection with the published findings
- b. Publish the appropriate details of the project
- c. Correct any misleading aspects of the published presentation of the findings

Electronic Copies

Electronic copies of reports, presentations, proposals and other documents must not be altered or amended if that document is still identified as a Colmar Brunton document. The authorised original of all electronic copies and hard copies derived from these are to be retained by Colmar Brunton.

Colmar Brunton™ New Zealand is certified to International Standard ISO 20252 (2012). This project will be/has been completed in compliance with this International Standard.

