



COMMERCIAL GREYHOUND RACING NZ MARKET ANALYSIS

CAMORRA RESEARCH REPORT
PREPARED IN CONFIDENCE FOR SPCA NOVEMBER 2024





Setting the scene

In October 2022, Insights HQ (trading as Camorra Research) were commissioned to undertake an independent, robust, and representative analysis of sentiment towards commercial greyhound racing among the New Zealand population.

The objective of the research was to provide unbiased and reliable data regarding:

- Current awareness and familiarity with commercial greyhound racing
- Current attitudes and perceptions
- Level of current support or opposition
- Context, in terms of current relevant behaviours



Research Sample

Inisghts HQ were commissioned to conduct a second wave in 2024 to understand if attitudes towards commercial greyhound racing have changed.

In both waves, it was crucial to optimise data integrity through sampling and research design methodologies.

In 2022, we surveyed a base of 1,327.

In 2024, a base of 817 were surveyed.

The my2cents sampling solution was employed, which allows validation of results and is the preferred sampling source for all major NZ banks.

To ensure representativeness, we employed a multi-cell quota design with interlocking quotas for age, gender, and region. Final data was weighted to NZ Census data.

The questionnaire was designed using balanced response scales.

Notes on methodology

Insights HQ are sampling and data experts within the market research industry. We provide syndicated sample and research for the NZ finance industry, including all major banks via our syndicated sample solution my2cents.

We also work with Waka Kotahi NZTA and the Commerce Commission to provide robust and representative research among the New Zealand population.

For this research, New Zealanders were invited by email in November 2024 to complete the survey. The invite did not mention SPCA, nor did the questionnaire, in order to maintain research independence.

Respondents were invited to click a link in the email, which took them to the survey platform (my2cents) where they completed the 8-10 minute questionnaire.

To ensure data integrity, the sample was representative, robust, and reflective:

- Representative: we use interlocking quota design so that the final sample is nationally representative by age, gender, and region
- Robust: we interviewed a large sample of 817
- Reflective: we avoid long, interrogation style questionnaires which encourage speeding and damage data integrity
- Questionnaire design includes balanced scales, options for respondents to say, “don’t know” (i.e. we don’t force or lead responses)

Data was analysed and the following top-line report produced. We focus on providing a comprehensive, objective, and evidence-led report. Transparency is important to Insights HQ, and so we welcome questions.



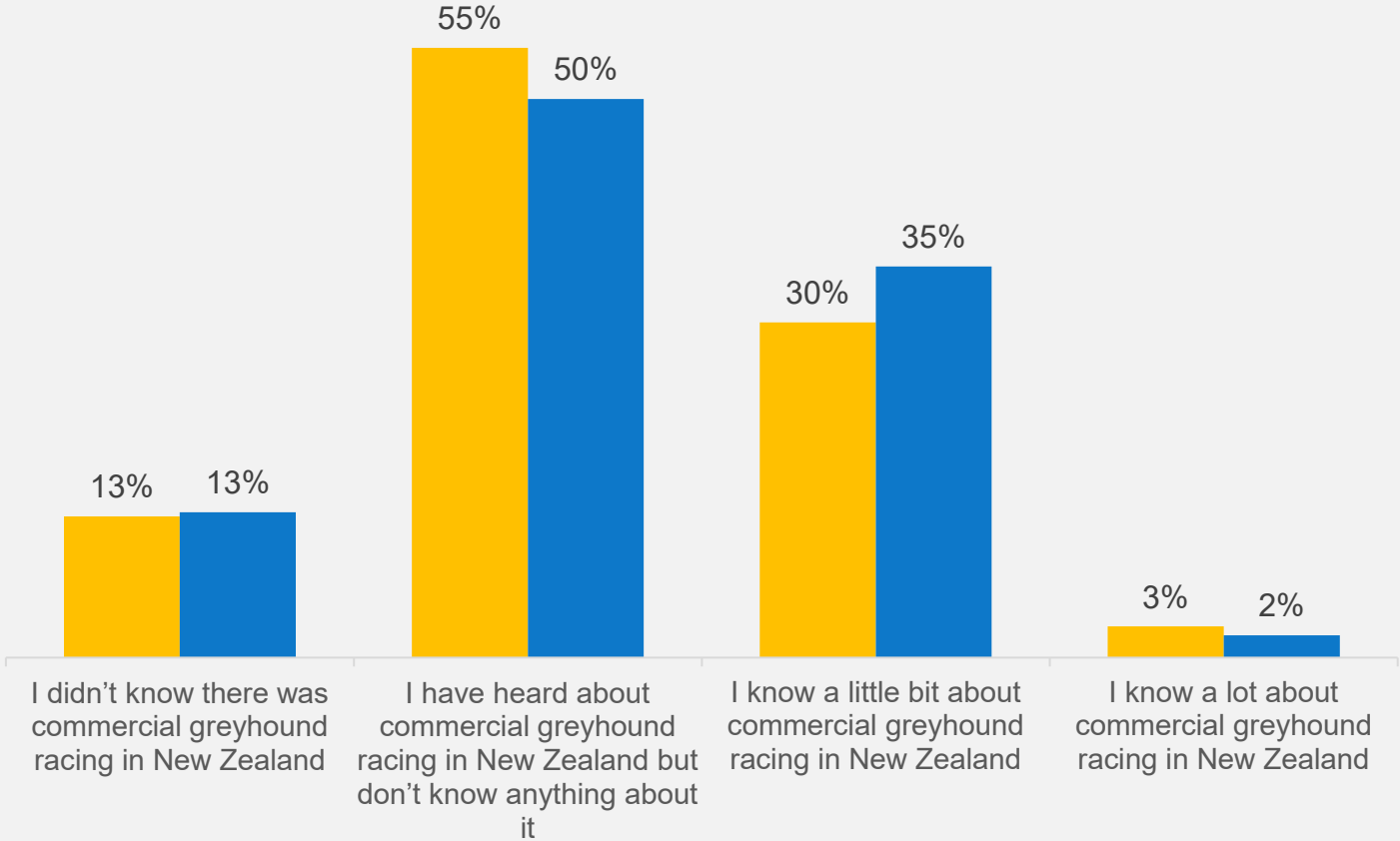
MARKET CONTEXT

Current awareness and participation



FAMILIARITY WITH COMMERCIAL GREYHOUND RACING

■ 2022 ■ 2024



Over two thirds are either unaware (13%) or are aware but don't know anything about commercial greyhound racing in New Zealand (50%).

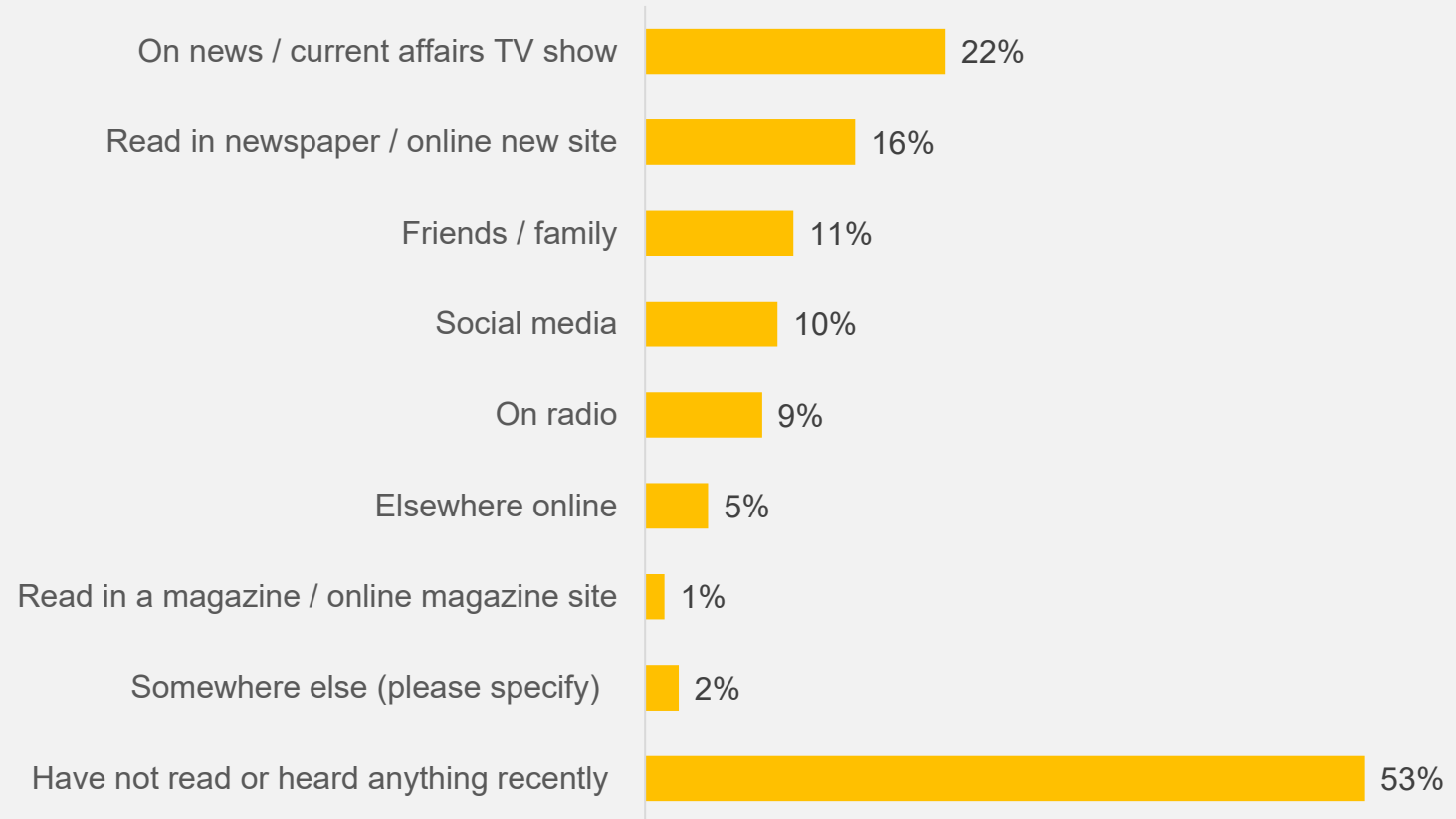
This has remained largely unchanged over the last 2 years.

Q. How familiar are you with commercial greyhound racing in New Zealand?
Base Total 2022 n=1,327, 2024 n=817

The majority (53%) have not heard anything about commercial greyhound racing recently.

Among those who have, this is most likely to be via a news or current affairs TV show.

RECENTLY HEARD ANYTHING ABOUT COMMERCIAL GREYHOUND RACING

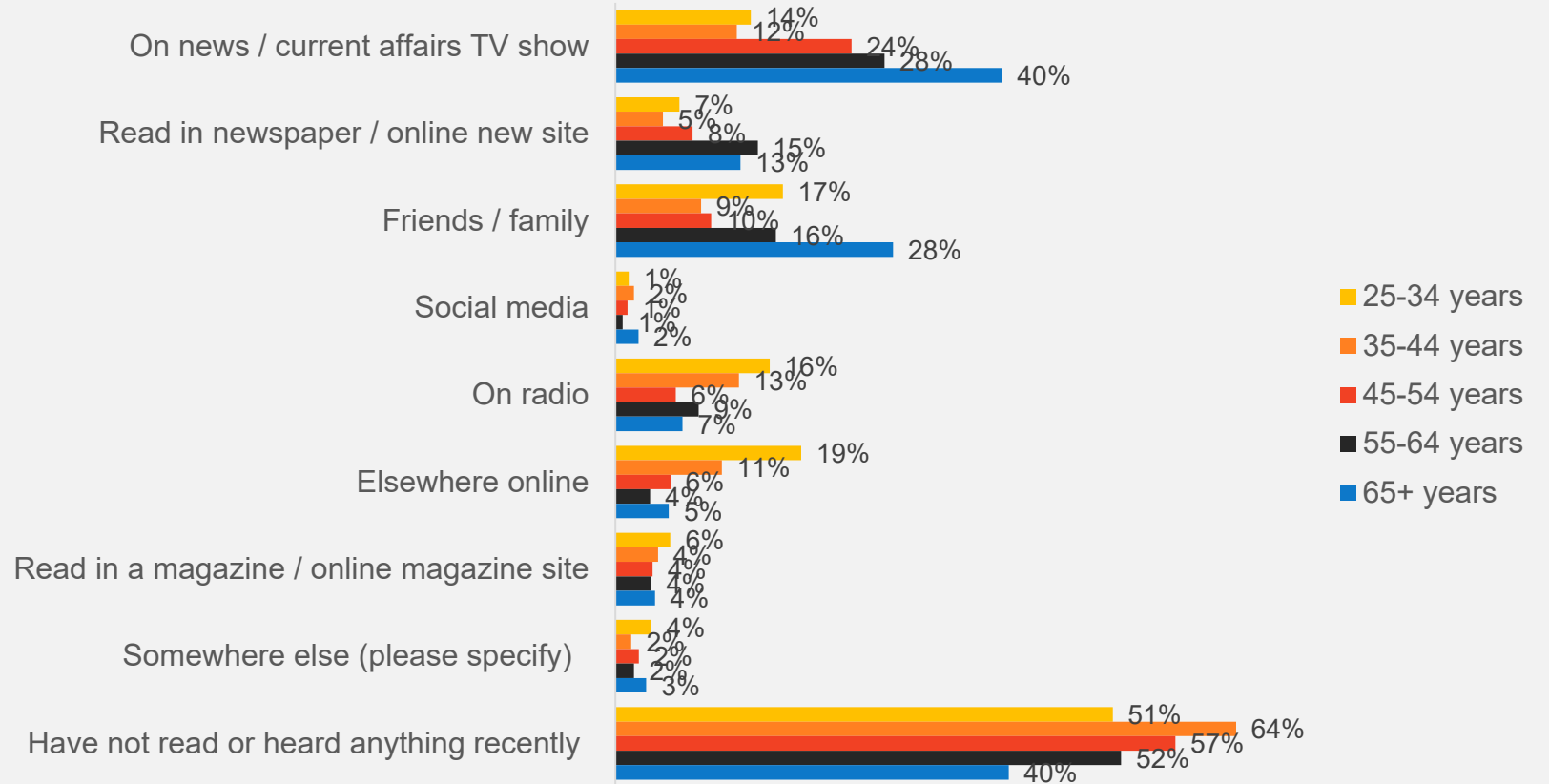


Q. Have you recently heard or read anything about commercial greyhound racing in New Zealand? If so, where?
Base Total n=817

Over 65s are more likely to have heard something recently about commercial greyhound racing, particularly from news / current affairs shows or via friends / family.

Among younger New Zealanders who have recently heard something, online and radio are more common sources.

RECENTLY HEARD ANYTHING ABOUT COMMERCIAL GREYHOUND RACING

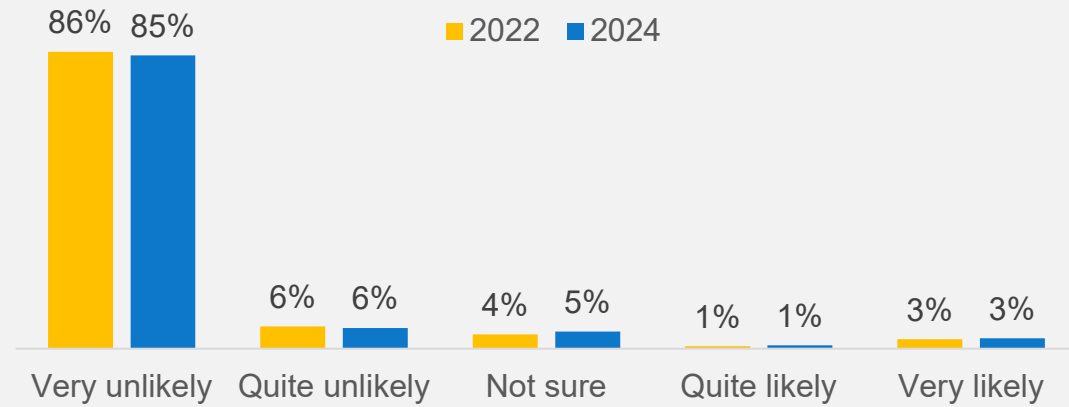


Q. Have you recently heard or read anything about commercial greyhound racing in New Zealand? If so, where?
Base Total n=817

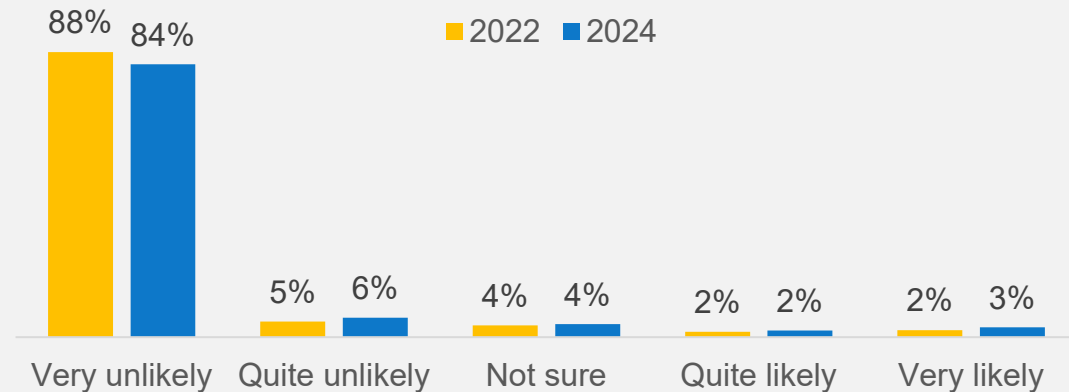
The large majority of New Zealanders are unlikely to either attend or bet on a greyhound race in the next 6 months.

Approximately 4% of the population are likely to attend or gamble on commercial greyhound racing in the next 6 months, indicating the financial benefits of commercial greyhound racing to the local economy are minor.

HOW LIKELY ARE YOU TO ATTEND A LIVE COMMERCIAL GREYHOUND RACE IN THE NEXT 6 MONTHS?



HOW LIKELY ARE YOU TO BET / GAMBLE ON COMMERCIAL GREYHOUND RACING IN THE NEXT 6 MONTHS?

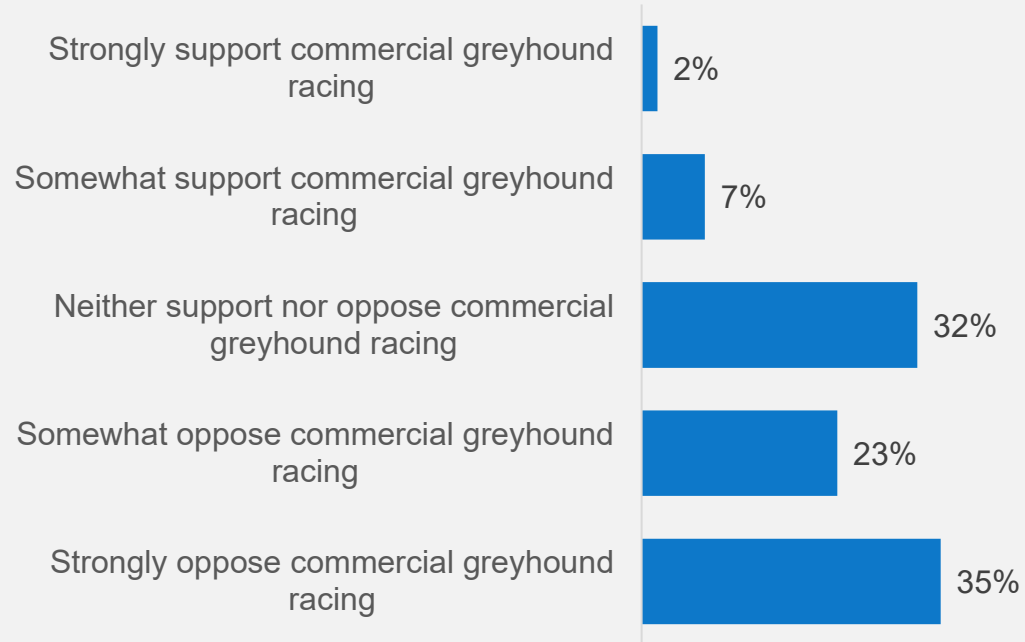


Base Total 2022 n=1,327, 2024 n=817

Only 1 in 10 New Zealanders support the continuation of commercial greyhound racing.

Over half (58%) opposes its continuation.

SUPPORT CONTINUATION OF COMMERCIAL GREYHOUND RACING



Q. Do you support the continuation of commercial greyhound racing in New Zealand?
Base 2024 n=817



CURRENT PERCEPTIONS

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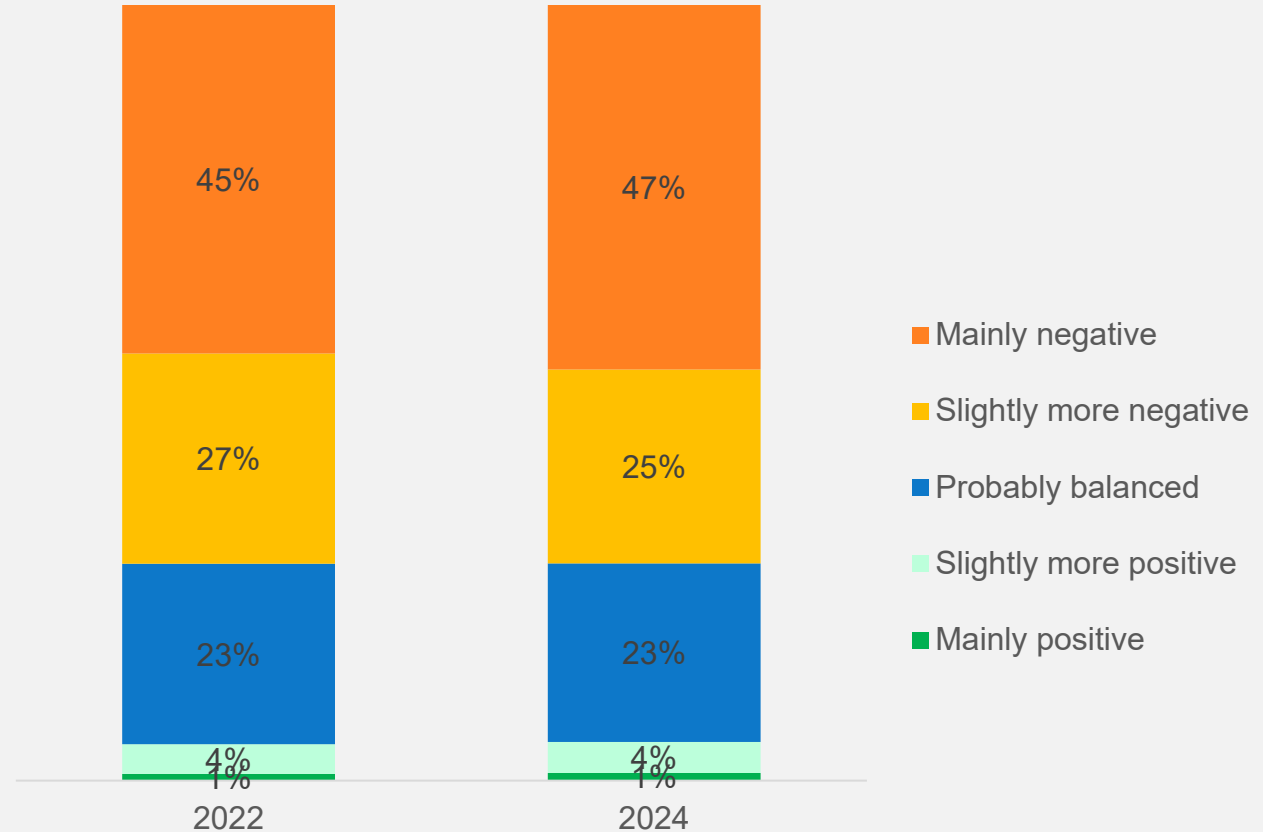


On balance, most New Zealanders think there are more negatives than positives to commercial greyhound racing.

About a quarter think the positive and negative aspects are probably balanced, while 72% think there are more negative aspects.

This has remained unchanged over the past 2 years and we infer it is unlikely to change in the near future.

GENERAL VIEW ON COMMERCIAL GREYHOUND RACING



Q. Some people think there are positives to commercial greyhound racing while others think there are negatives. On balance, do you think there are more positive or negative aspects?

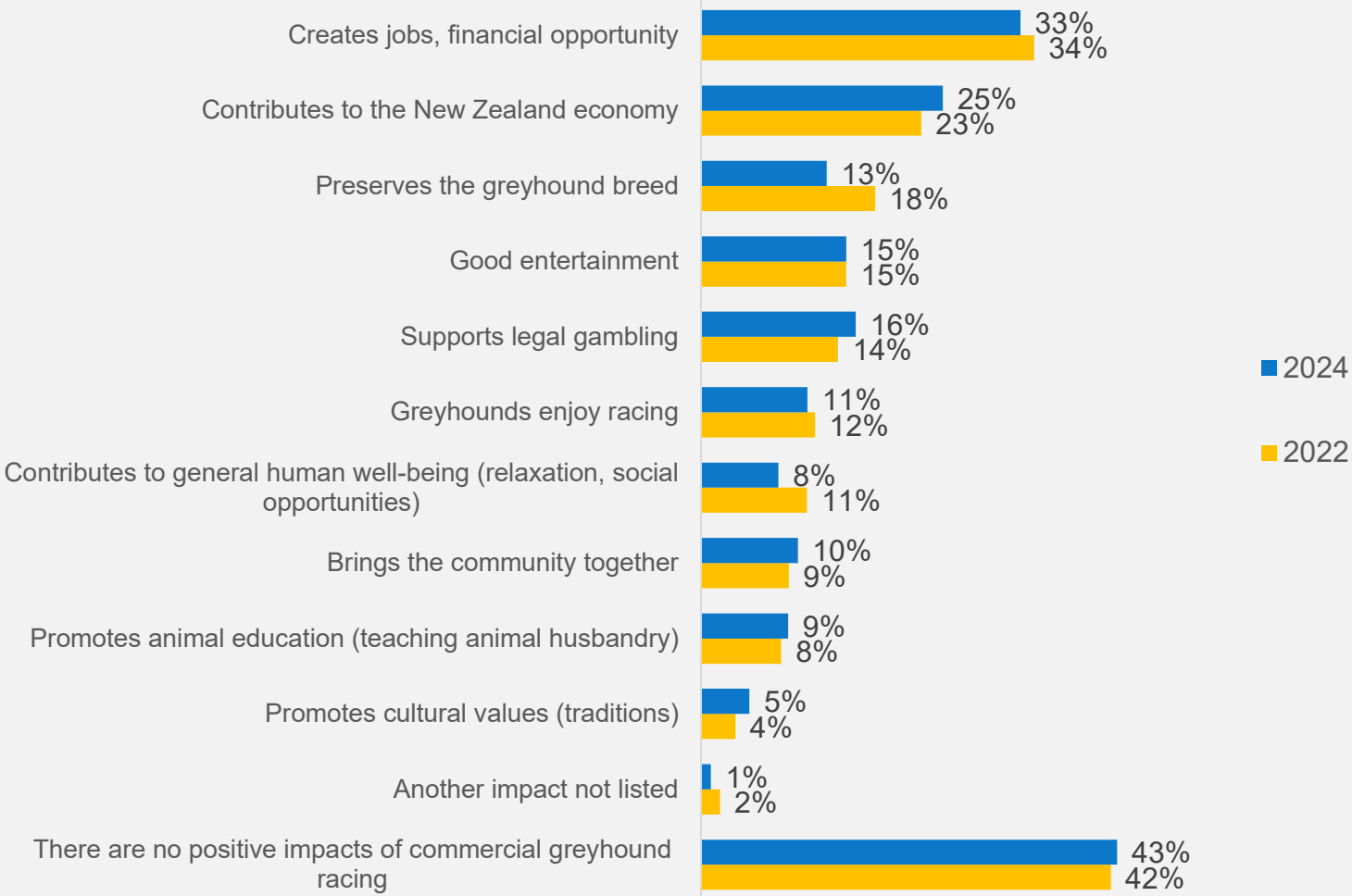
Base Total 2022 n=1,327, 2024 n=817

PERCEPTION OF POSITIVE IMPACTS OF GREYHOUND RACING

When asked about positive aspects of commercial racing, the most cited reasons are financial.

- 34% believe greyhound racing creates jobs and financial opportunity
- 23% believe greyhound racing contributes to the economy

However, 42% don't believe there are any positive aspects of commercial greyhound racing.



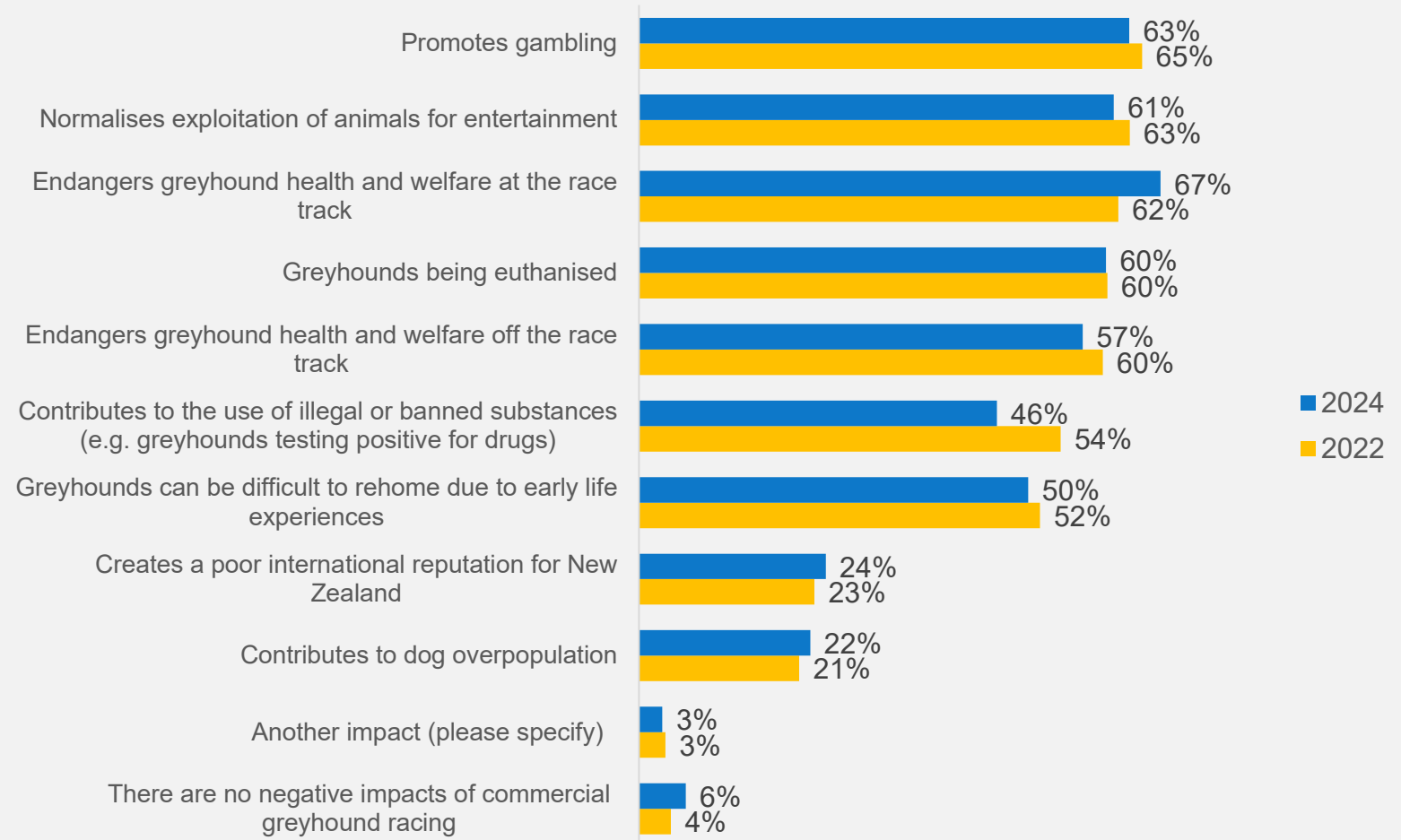
Q. What would you say, if any, are the positive impacts of commercial greyhound racing in New Zealand?
 Base Total 2022 n=1,327, 2024 n=817

When asked about negative aspects of commercial racing, the common themes revolve around the:

- Promotion of gambling
- Normalising the exploitation of animals
- Greyhound health and welfare
- Euthanasia of greyhounds

In total, almost all New Zealanders (94%) recognise that there are negative impacts of commercial greyhound racing.

PERCEPTION OF NEGATIVE IMPACTS OF GREYHOUND RACING

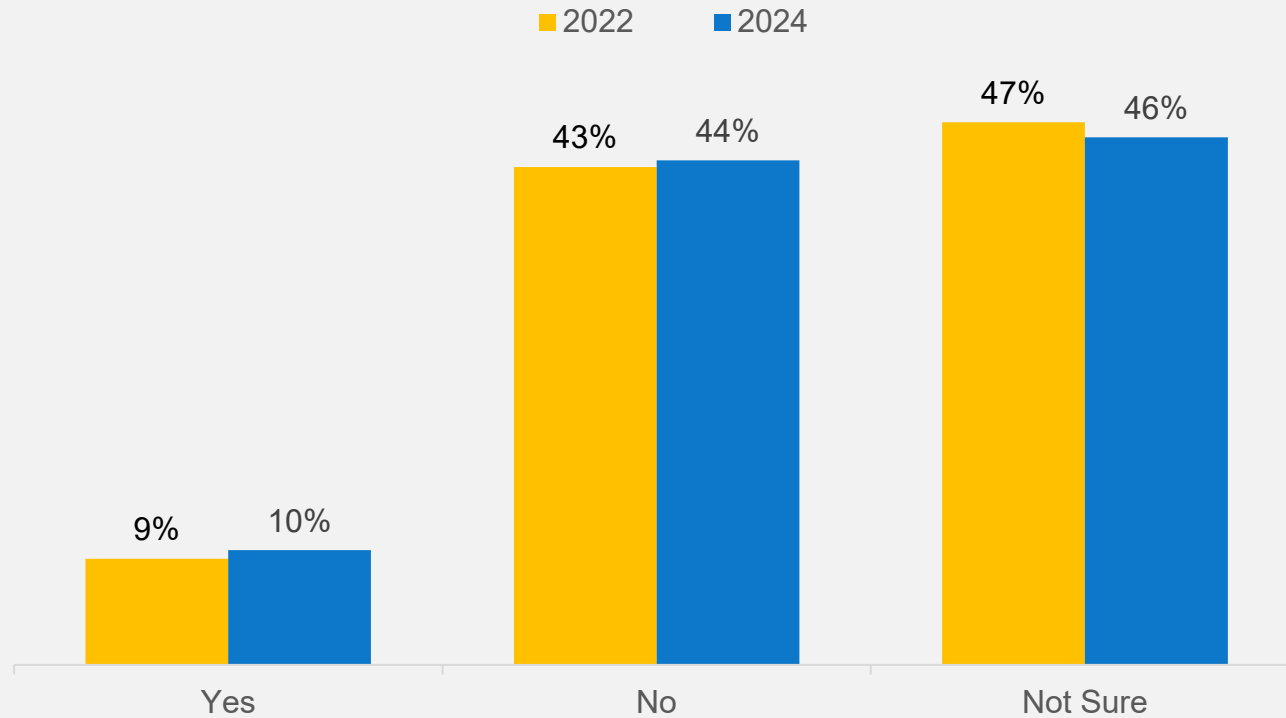


Q. And what would you say, if any are negative impacts of commercial greyhound racing in New Zealand?
 Base Total 2022 n=1,327, 2024 n=817

Only one in ten New Zealanders believe greyhounds bred for racing have a good life.

This has remained unchanged since 2022.

PERCEPTION THAT RACING GREYHOUNDS HAVE A GOOD LIFE

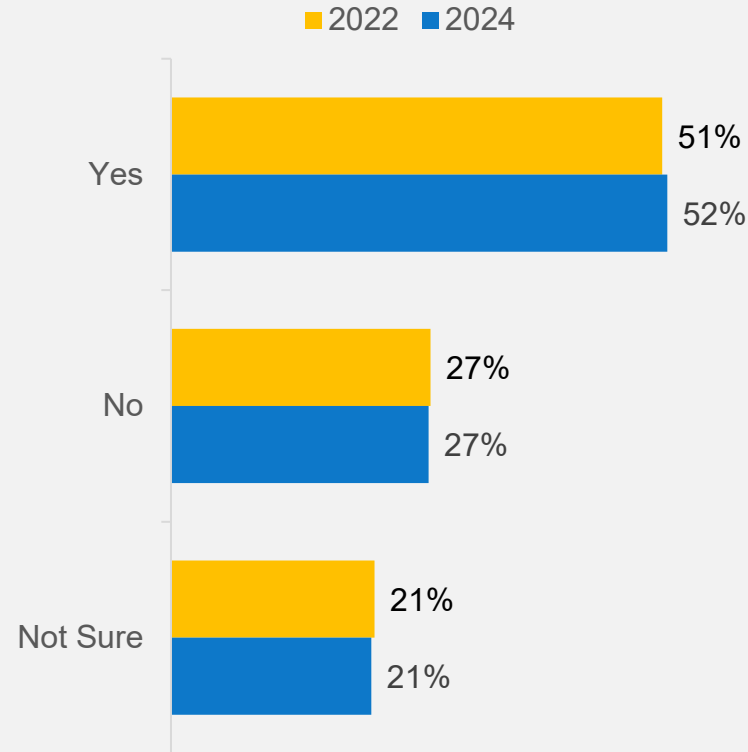


Q. Do you think greyhounds bred for racing have a good life?
Base Total 2022 n=1,327, 2024 n=817

Half of the population think that gambling in general is acceptable. However, this falls to 18% when we talk about betting on greyhound racing.

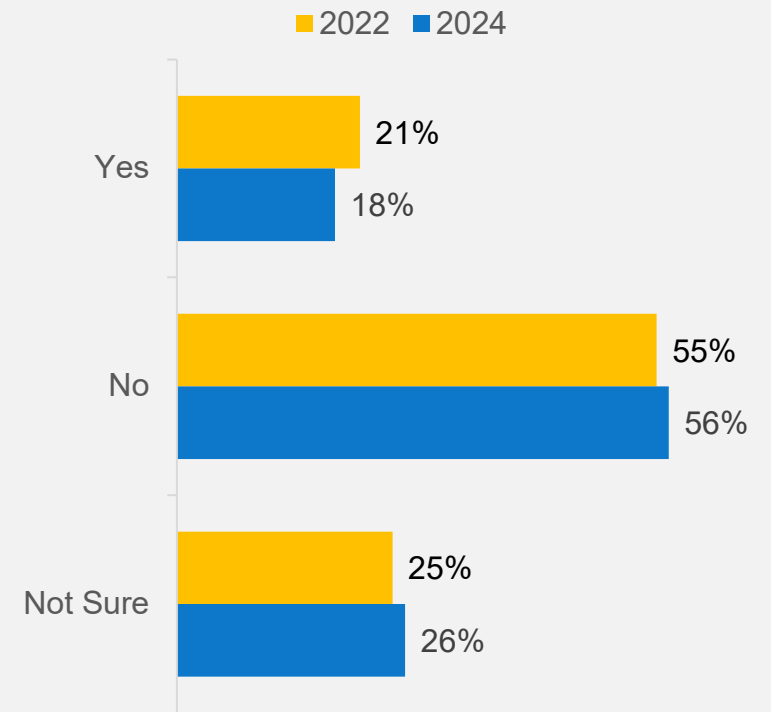
Since 2022, we see a slight softening in the perceived acceptability of gambling on greyhound racing.

ACCEPTABILITY OF GAMBLING IN GENERAL



Q. In general, do you think any type of gambling is acceptable?
Base Total 2022 n=1,327, 2024 n=817

ACCEPTABILITY OF BETTING ON GREYHOUND RACING



Q. Do you think betting on greyhound racing is an acceptable form of entertainment?
Base Total 2022 n=1,327, 2024 n=817

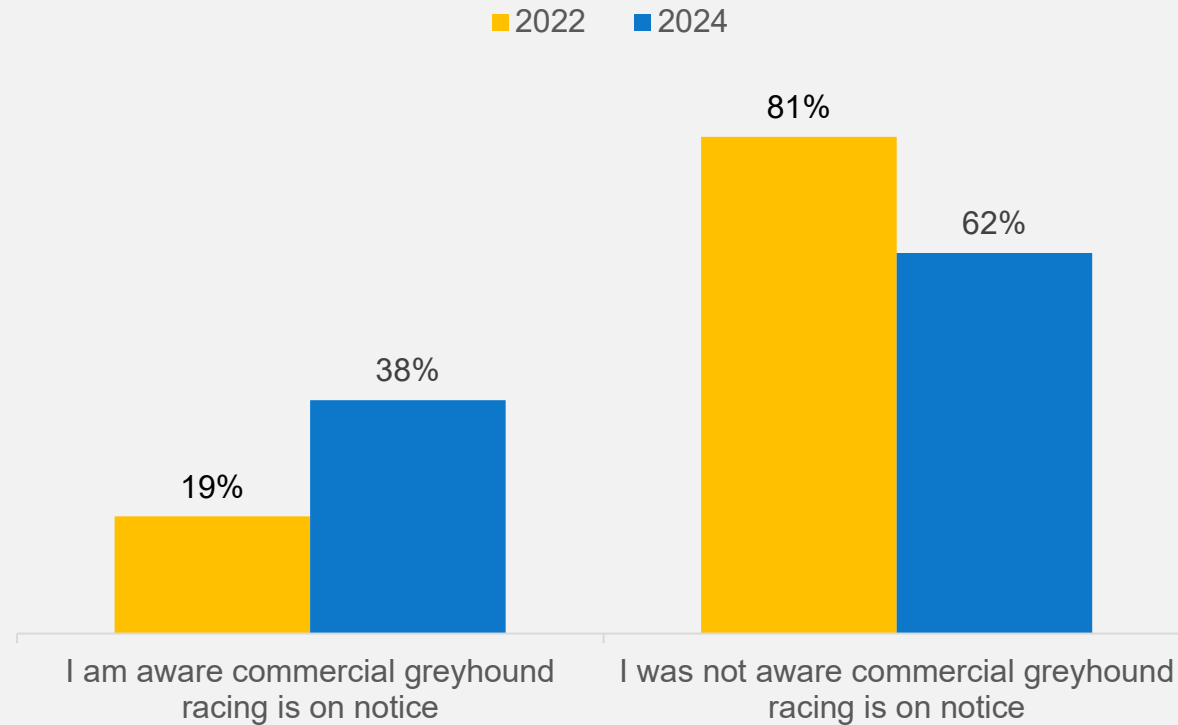


CURRENT SUPPORT

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Over the past 2 years, awareness that greyhound racing has been put “on notice” has increased significantly, with over a third of New Zealanders (38%) now aware.

AWARENESS THAT GREYHOUND RACING IS “ON NOTICE”



Q. Are you aware that commercial greyhound racing has been “on notice” since 2021, meaning that it could be shut down if greyhound welfare, transparency, and data recording are not addressed?

Base Total 2022 n=1,327, 2024 n=817

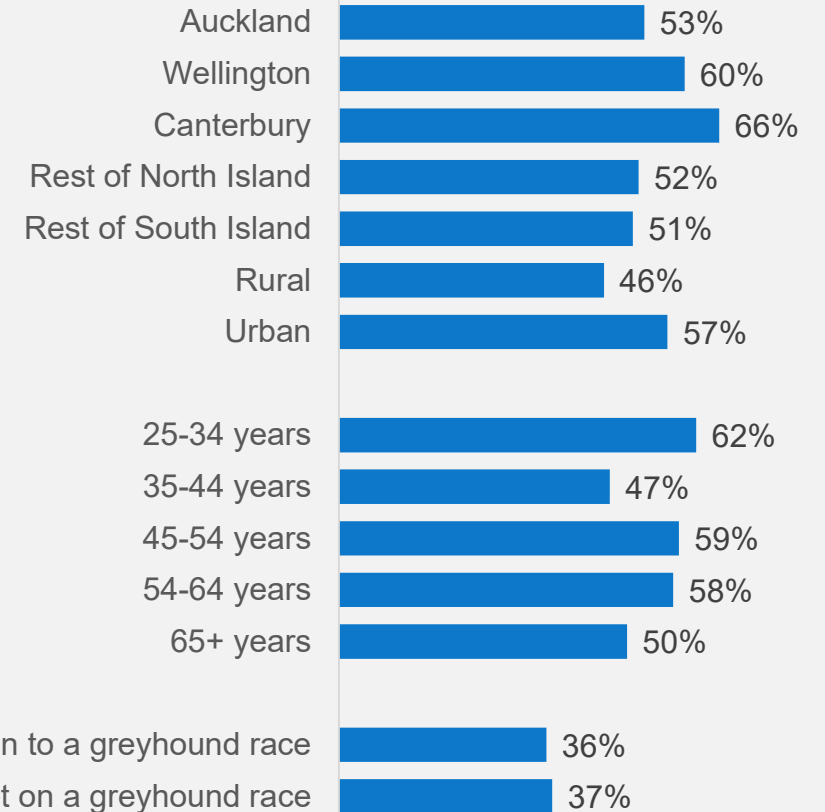
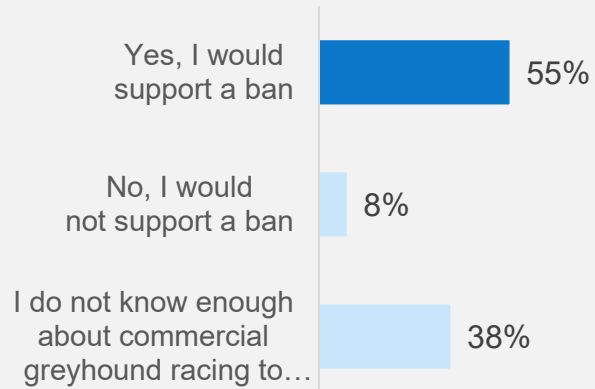
The majority of New Zealanders (60%) would support a ban on commercial greyhound racing, and half of New Zealanders (51%) would be willing to sign a petition.

Only 8% would not support a ban.

Support for a ban on commercial greyhound racing is high across a broad range of demographic segments in New Zealand.

Even among the proportion of New Zealanders who have been to or bet on a greyhound race, over a third would support it being banned.

SUPPORT FOR A BAN ON COMMERCIAL GREYHOUND RACING

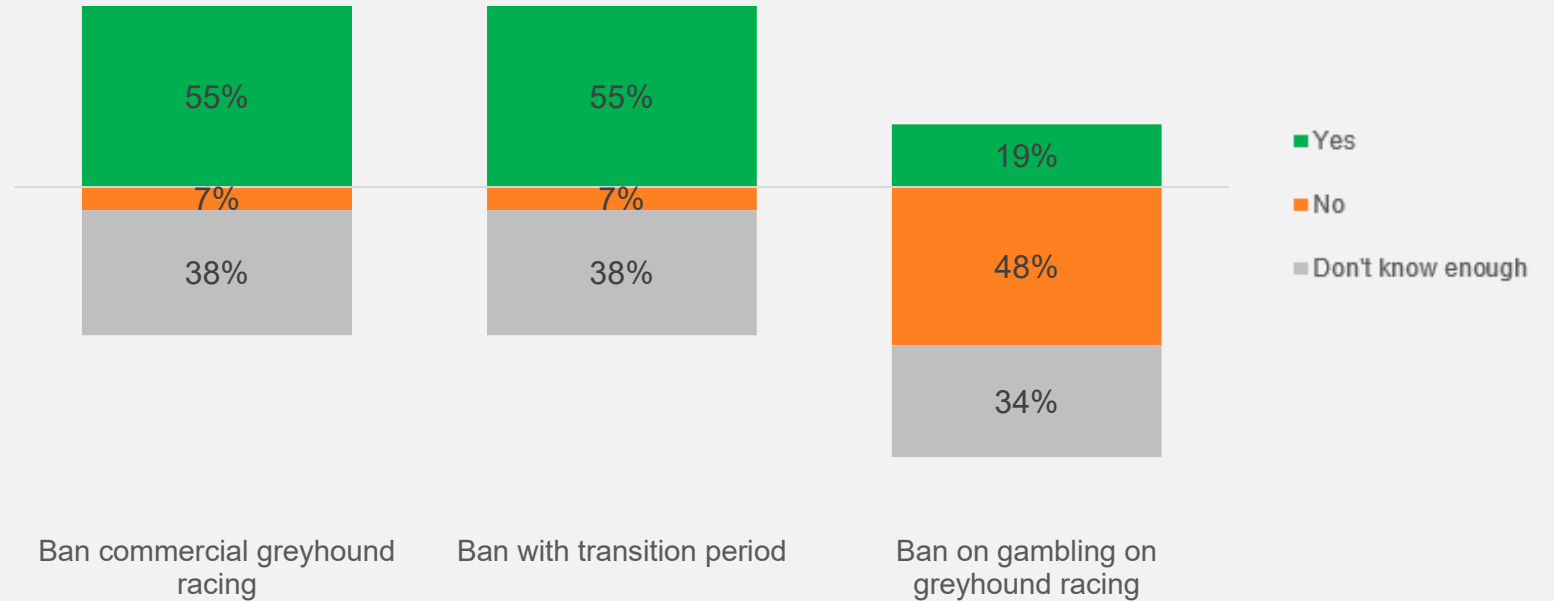


Q. Would you support a ban on commercial greyhound racing in New Zealand?
Base Total 2024 n=817

Over half of New Zealanders would support a ban on commercial greyhound racing with a transition period.

Over a third of New Zealanders are unsure, but we have seen that the vast majority do not think there are positives to commercial greyhound racing and support for its continuation is low.

Support for different options



Q. Would you support a ban on commercial greyhound racing in New Zealand?

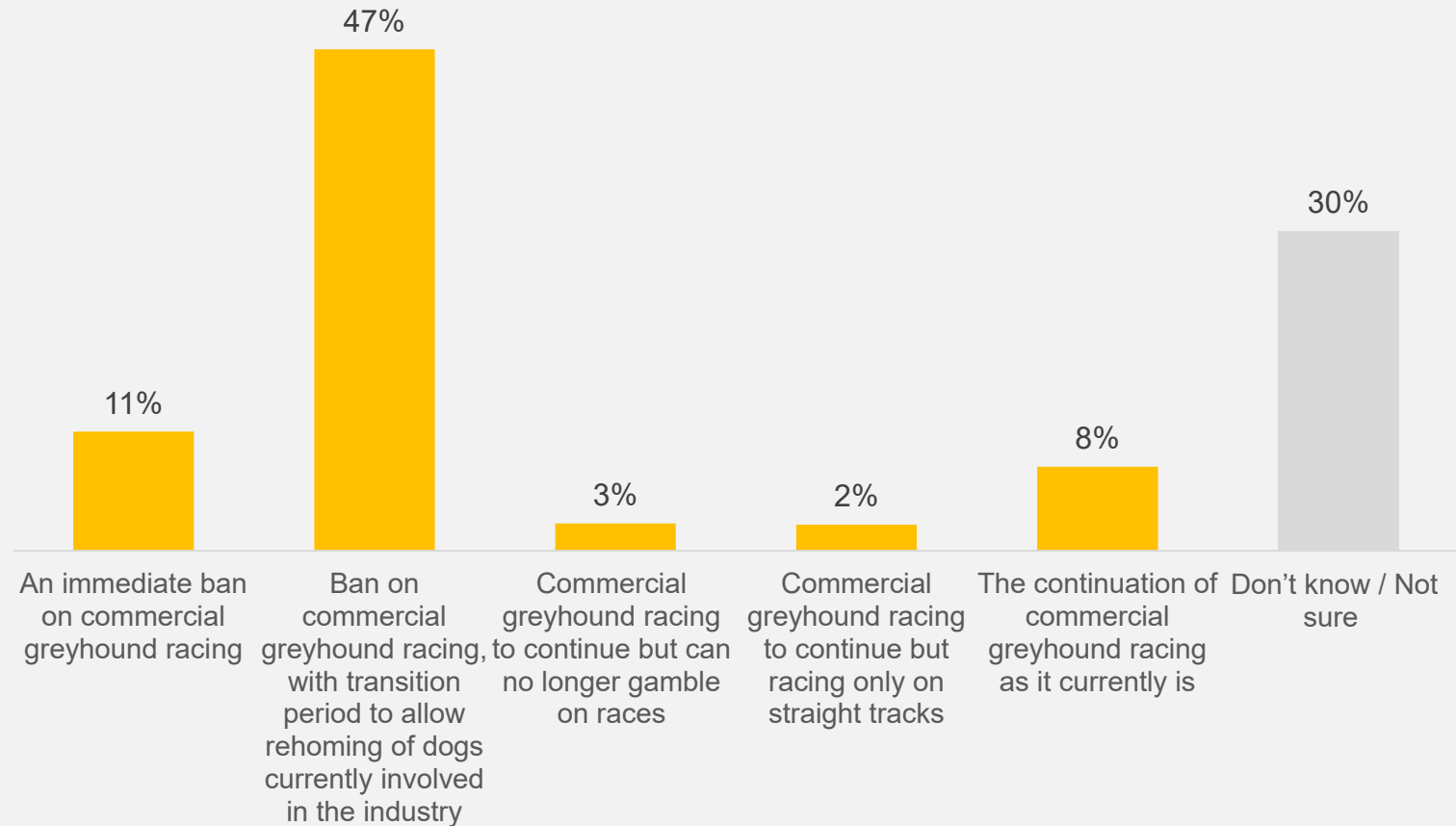
Q. Would you support a ban on commercial greyhound racing in New Zealand, with a transition period to allow rehoming of dogs currently involved in the industry?

Q. Would you support a ban on gambling on greyhound racing in New Zealand? Greyhound races can continue but without any gambling.

Base Total n=817

There is overwhelming preference for banning commercial greyhound racing, either immediately (11%), or with a transition period (47%) to allow the rehoming of dogs currently involved in the industry.

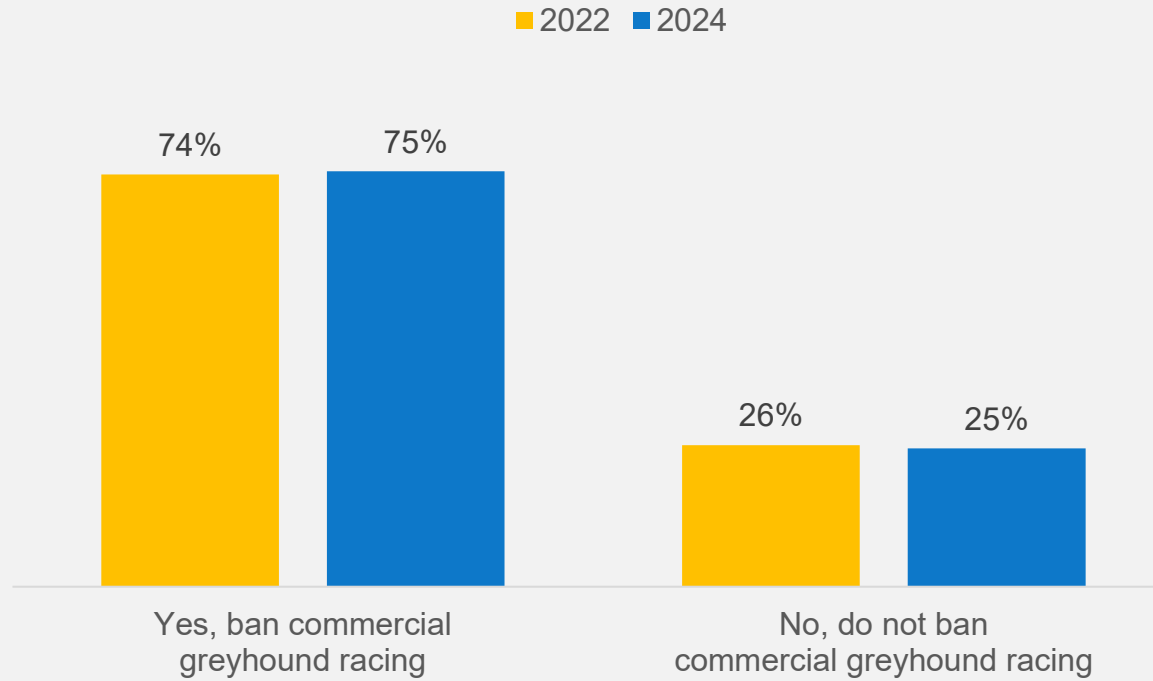
Preference for future of commercial greyhound racing in NZ



Q. Which one would you prefer?
Base Total n=817

Approximately three-quarters of New Zealanders would vote to ban commercial greyhound racing if a referendum was held.

LIKELY VOTING BEHAVIOUR IN REFERENDUM

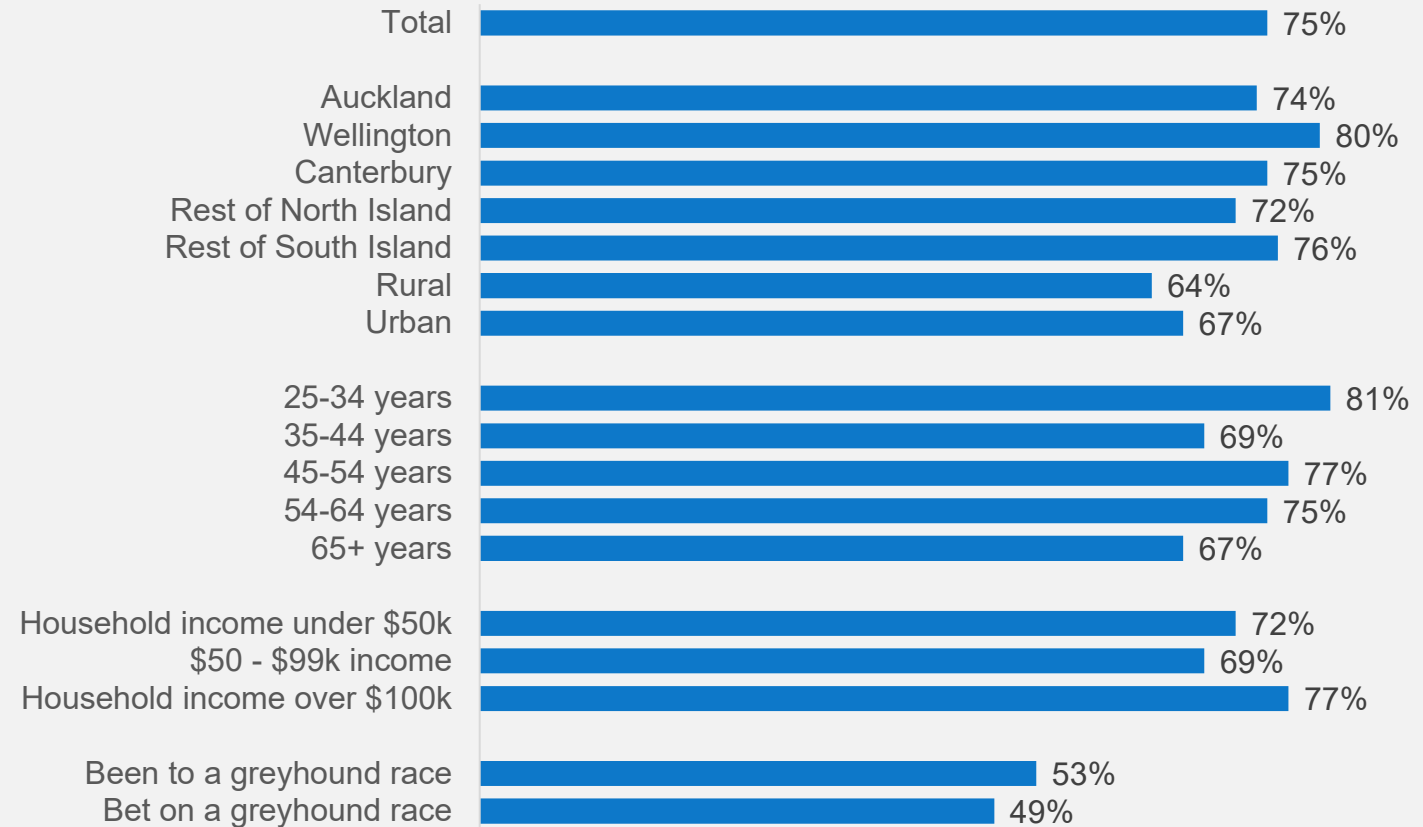


Q. If a referendum was held tomorrow to ban commercial greyhound racing how would you vote?
Base Total 2022 n=1,327, 2024 n=817

Across New Zealand regions and age groups, the majority of New Zealanders would view to ban commercial greyhound racing in a referendum.

Support for banning is also high among those who have been to or bet on a greyhound race.

LIKELY VOTING BEHAVIOUR IN REFERENDUM %vote to ban commercial greyhound racing

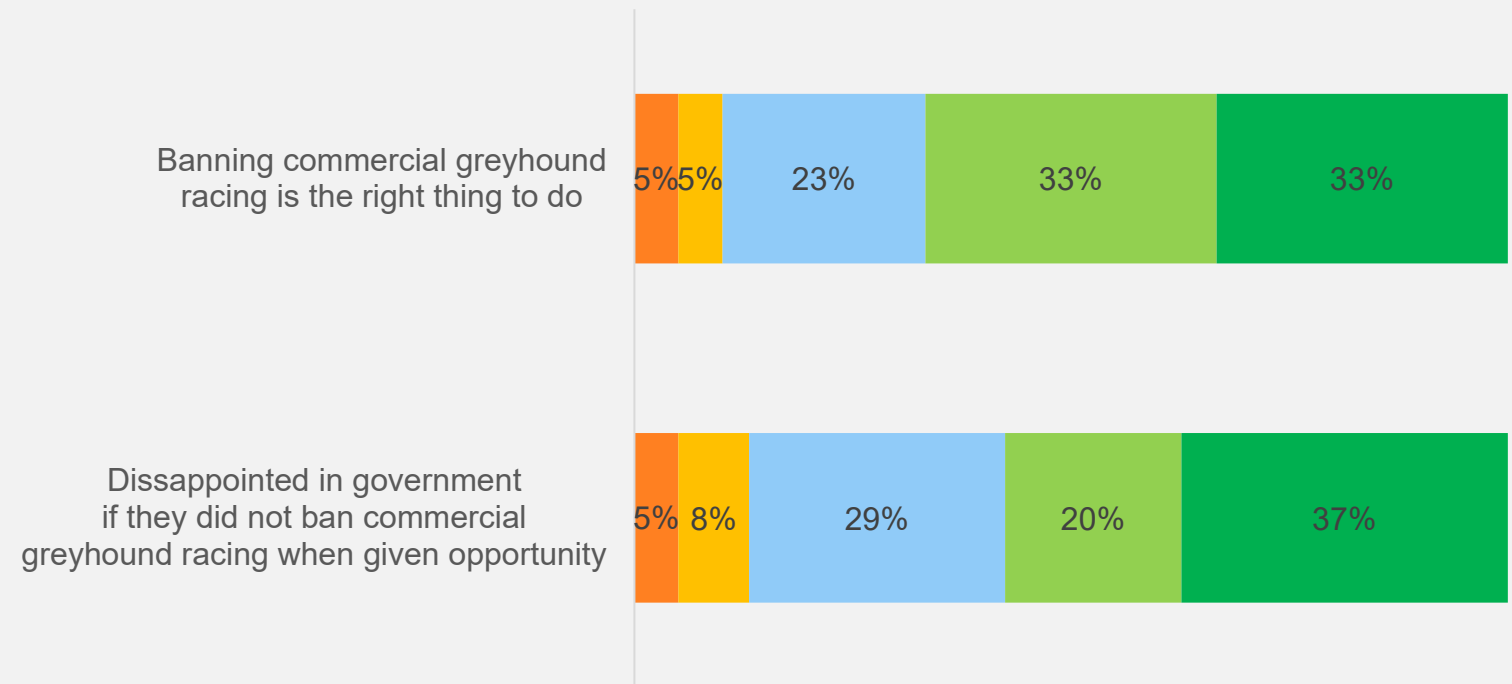


Q. If a referendum was held tomorrow to ban commercial greyhound racing how would you vote?

Base 2024 n=817

LEVEL OF AGREEMENT WITH STATEMENTS

Strongly disagree Somewhat disagree Neither agree nor disagree Somewhat agree Strongly agree



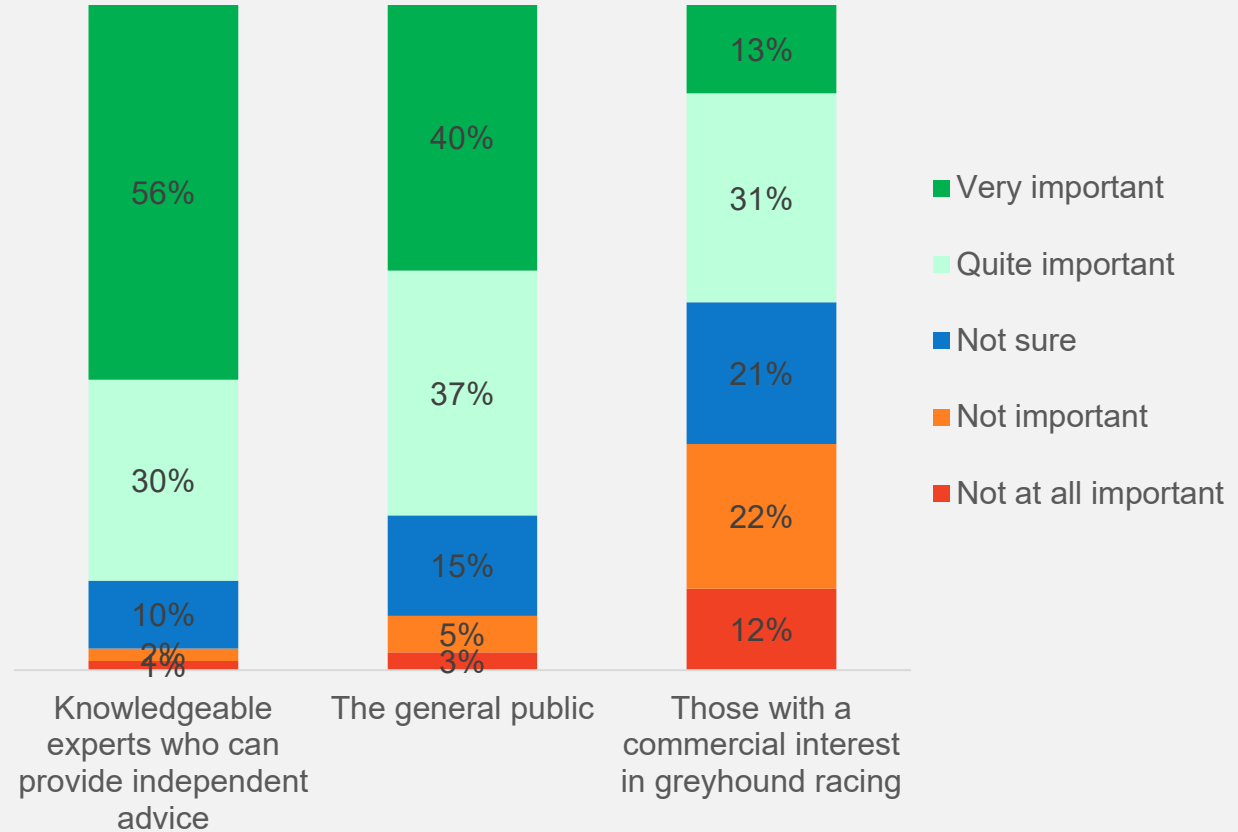
Q. Do you disagree or agree with the following statement?
Base Total n=817

The majority of New Zealanders (66%) agree banning commercial greyhound racing is the right thing to do (68% in 2022).

57% of New Zealanders would be disappointed if the government did not ban commercial greyhound racing if given the opportunity (58% in 2022).

The majority of New Zealanders (86%) think it is important that the government look to reflect the views of knowledgeable experts, while over three quarters (77%) think the government should also reflect the views of the general public.

IMPORTANCE OF REFLECTING PUBLIC VIEWS IN POLICY DECISIONS



Q. When deciding whether to ban commercial greyhound racing, how important do you think it is that the government look to reflect the views of:
Base Total, 2024 n=817



THANK YOU

SHAWN HENRY

021 309 417

shawn.henry@camorra-research.co.nz

ANDREW PAUL

027 526 9534

andrew.paul@camorra-research.co.nz

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RESEARCH LTD