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RURAL LEADERSHIP  
PROGRAMME



# The Domestic Marketing of the Dairy Industry: Have We Missed A Spot? A Deeper Look Into Our Social Licence.

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## Executive Summary

The dairy industry is a leading contributor to the New Zealand economy, making up over 5% of GDP in seven regions and employing up to 50,000 people nationwide (*Ballingall & Pambudi, 2020*). In spite of this, we see increasing local interest in vegetarianism and veganism (*Colmar Brunton\_Better Futures Presentation, 2020*) and we see increasing resistance not only to dairy farming practises themselves but also to the accompanying practises required to maintain this industry such as pest and disease control. This causes concern for several reasons, including given that the public have access to international platforms where our international market engages (*statistia.com, 2021*) and if New Zealanders do not believe in our produce, then how can we effectively market to the world.

This research was conducted with the purpose of understanding more deeply the current market in which we are operating and where our social licence currently sits. The major focus of our industry appears to be a focus on telling our story, which relies entirely on the truth of that story being palatable to the New Zealand public and the assumption that rural New Zealand shares the same worldview as urban New Zealand.

Given this dilemma, I researched the meaning behind a citizen's statement of "I support the dairy industry" and why the meaning behind that simple statement could hold some answers for our way forward as an industry.

Key insights included that:

- Supporting the dairy industry does not mean that I am connected to the industry at all myself or through family
- Supporting the dairy industry does not mean that I visit rural New Zealand
- Supporting the dairy industry does not mean that I am aware of all of the practises carried out on farm
- Supporting the dairy industry does not mean that I am a consumer of dairy products
- Supporting the dairy industry does not mean that I agree with all of the practises carried out on farm, and some I may actively oppose
- Supporting the dairy industry does not mean that I like dairy farmers as people

My research also revealed that the New Zealand citizen has two distinct and separate roles in dairy farming, and both should be addressed – that of a consumer and that of a stakeholder.

Viewed in that light, competitors to the New Zealand Dairy Industry include social marketing aimed at decreasing the consumption of animal products and perceived animal cruelty, as well as the likes of specific product such as rice milk, sold from the Health Food chiller despite research showing lower nutrient content than cow's milk.

Overall, the New Zealand dairy industry sustains the life of hundreds of thousands of babies each year through infant formula (9% of overall dairy export, \$1.8B) (*StatsNZ, Sense Partners, 2020*), brings joy at fine dining experiences around the globe, and produce over 1500 dairy products and product formulations (*Ballingall & Pambudi, 2020*). We

invest water and soil and return a vital food source. And yet, milk consumption per capita in our own country has decreased and alternative products are on the rise, seemingly without strong opposition from the dairy industry.

The recommendation is for industry to discuss and determine appropriate engagement methods between the public and the dairy farmer, with a view to understanding shared and opposing values as a baseline for moving the industry forward. Along with this, of key importance is research to understand the relationship between the New Zealand citizen as a consumer and as a stakeholder in the land and the extent to which one influences the other. From there research is required to determine perceived barriers to change from dairy farmers in areas where values between the public and the farmer align.

We have three primary concerns facing us as an industry; engagement to reduce the urban-rural values divide, commercial marketing to increase perception of value of our product and social marketing to ensure the sustainability of our social licence. The way forward could certainly utilize all three methods.

## Introduction

I chose this research topic because I have been involved in agriculture for approximately seven years and I am confused.

I am confused that a girl – myself - can be born in the Waikato and yet not be exposed to agriculture until moving to Australia in her early twenties. I am confused as to how it is that when visiting a close friend in Rolleston, Canterbury he shared with me that the big machine on the bench was not a coffee maker, but a water filter, and that he and his family could not safely drink Rolleston town water. I am confused as to how it is that in our small rural community my children came home from primary school crying because they were being bullied for being dairy farmers kids'. I am confused as to how the same country that has a housing crisis also has scores of empty houses waiting, almost begging, for occupants on dairy farms. I am confused as to how the inheritance of seemingly phenomenal opportunity in land and business is actually one of the leading stressors for farming families.

How is it that I have witnessed grown men cry when they are praised as being good farmers when they produce one of the most nutritionally dense food sources available and they're still not sure they do something of value? And how is it that I have personally had funding declined for a project based on the latest survey that "proves" a lack of rural-urban divide when I have been harassed in the supermarket for "destroying our rivers".

One of my favourite life principles is that two opposing truths can both be true, and it seems to me that the dairy industry shows that principle to be relevant in a multitude of ways.

Which leads to possibly the greatest confusion of all – how is it that a nation that depends so much on dairy farming for overseas trade, that so desperately needs social licence to continue, that employs so many people, that produces such incredible produce, does not market its product domestically?

I worked for several years in the Mycoplasma Bovis Programme. I began in the field and later managed a team that oversaw a large number of farms. As a part of this role, I had the privilege of working with many farms and their families. One of the overwhelming constants across these farms was a feeling of not being valued and that the work that they did was not held in esteem. I couldn't help but wonder at this, given that the dairy farmers of New Zealand not only produce some of the finest milk products in the world, but also excellent meat from cull animals, and premium grade pharmaceuticals from our bobbies (*Hamill, Greg. 2021*).

I will never forget the first time I saw New Zealand produce when travelling overseas. It was a crate of apples. And my goodness, was there a celebration about those apples. A beautiful wooden crate, big cut-out posters, and stickers with NEW ZEALAND emblazoned across them. I remember thinking "They are really excited about our apples", closely followed by the thought that I eat those all the time and maybe I should take a moment to appreciate them more? The next New Zealand grown product I saw was lamb and that was handled differently. No massive signs, no crate. Just a very exclusive section of the chiller. It was obvious that this lamb was not intended for any old consumer. Again,

the sticker with NEW ZEALAND emblazoned across. I remember looking at the small trays and thinking “Damn! Maybe I eat better than I thought”.

I am a millennial myself and the entire time I’ve been in the dairy industry I’ve had this vague feeling that I missed out on some crucial information in the years leading up to these ones. I’ve always just thought that the gaps that I think that I see are there for a reason and that someone else decided this on purpose long ago. However, as time goes by, I realise that the gaps aren’t there for a good reason and some of the things we do were never purposefully determined. Sometimes we have just continued as we have been because we are an old (in New Zealand terms) industry and what we are doing seems to be working.

We won’t find the best way forward unless we are willing to ask some open questions and view the answers with curiosity. There is nothing to defend here, no blame, no wrong or right. This whole project was designed to be based on my own curiosity and I hope that you will enjoy reading it in that light.

## Methodology

The method for this research was a literature review and interviews.

The literature review was to determine whether the assumptions that I held were true, firstly that NZ milk has something to offer above overseas trade but is also nutritious and has a lot to offer our own country. Secondly, I wanted to examine the marketing of alternative products and a basic review of the methods that those alternative products use.

The interviews were designed to understand more deeply the thinking behind some of the statements and opposing actions that I have personally witnessed over the years, mostly that someone can state that they support the dairy industry but not support many of the facets that are a part of that dairy industry. I was most keenly interested in understanding whether “support” was as a consumer or a stakeholder and how that might influence both the method of marketing and the effectiveness of marketing.

I had originally intended to complete a survey then quickly realised that this has been done on numerous occasions by several of our industry bodies. Interviews were determined to be more thorough as the purpose of the research was to more deeply understand some of the standard answers and conflicting behaviours I have personally witnessed across people with regard to dairy farming. The interviews were comprised of 24 standard questions and were conducted in person or over the telephone. It was important that I removed bias – anyone talking to me was only one step removed from a dairy farmer – so I recruited two assistants to also conduct interviews on my behalf. These two assistants were of different generations to my own and one lived in a different region. Both assistants were provided some interview techniques, for example to remove any reaction to an answer, and the standard list of questions. The requirement for those interviewed was that they must be:

- living in New Zealand at the time of interview and;
- must not be dairy farmers themselves.

There is limited market research available relating to NZ dairy farming and so much of the information presented here is accumulated from various statements taken from organisations that paint a picture.

## Domestic Marketing – What Is It?

Domestic is defined by the Oxford Advanced Learners Dictionary as an adjective meaning “of or inside a particular country; not foreign or international”. Marketing is defined by the same as a noun meaning “the activity of presenting, advertising and selling a company’s products or services in the best possible way”. It then goes on to give the examples of *a marketing campaign/strategy* and *a marketing manager/director/department*.

During the research of this project, I was unable to locate any such strategy or document for the New Zealand Dairy Industry.

95% of New Zealand’s dairy products are exported (*Statista, 2021*). “Of the almost 22 million metric tons that were produced in 2019, only around 525 thousand metric tons were domestically consumed. Due to New Zealand being geographically distant from its export partners, the whole milk powder segment was by far the most dominant. In 2019, China was the largest trade partner for New Zealand whole milk powder, a position that looks set to continue into the future.” (*Hinton, 2021*).

While this may seem on the face of it to be a sound position, statistics also show that while domestic consumption of milk has increased over the last five years, the per capita domestic consumption of milk has slowly declined between at least the years 2014-2018 (more recent information is not currently available). There is also a note that “New Zealand has a reputation for producing high quality milk and milk products. Recently, however, this reputation has been tarnished due to contamination scares and environmental challenges.”

## Story vs. Marketing

We see an increasing interest within the industry in the notion of storytelling as a strategy to increase social acceptance of dairy farming within New Zealand. This appears to be based on the belief that New Zealand farmers are some of the best in the world and we can be proud of the work that we do (Launching the New Zealand Dairy Story, 2021). While both of these things are true, it must be noted that a story is entirely dependent on the storyteller and we have a consistent raging debate as to the rural-urban divide. With such a strong debate in play the rural-urban divide must be acknowledged as a risk factor to the Story strategy – rural and urban dwelling people may well both look at the same thing and have an entirely different understanding. The simplest example is the bobby calf – to a dairy farmer that calf has been well housed, cared for, fed, and will contribute unparalleled products to the export market. To an urban person, it may be entirely intolerable that the bobby calf was ever created in the first place. 60% of urban New Zealanders do not even visit rural New Zealand. (UMR Research, 2017).

The image below is a further example:



While the farmer to whom these cows belonged was proud of this photograph (the cows are well fed) a person living in Wellington described it as “confronting” and made her feel “uncomfortable” as she usually saw photos of cows on green pasture. In an article recently featured on the prominent Microsoft Network about NZ Dairy, the author states “Cows standing in grassless paddocks, often with their hooves in mud, is a disturbing sight.” (Baskett, 2021).

Story focuses on the *who* and the *how* and presumes that the consumer not only wants to hear that but also agrees with our worldview. It is true that compared to other dairy farmers around the world we do have a good story, however we aren’t competing with other dairy farmers anymore and it is not an apples-for-apples race. Our competitors are alternative products entirely. While we do provide massive amounts of produce to the world, and while we do operate profitably without subsidies, the painful reality is that not all of our dairy farming story is good – we have appalling mental health statistics (The State of the Rural Nation Survey shows 70% of rural New Zealanders have felt increased stress over the last five years), we are one of the nation’s high-risk industries for Health and Safety (ACC has spent more than \$383 million on farm related injuries in the past five years, with the cost in 2020 the highest from this period. (acc.co.nz)), we are the only nation in the world to routinely mass cull calves at 4 days old, we are the leading nation for importing PKE as stock feed (IndexMundi.com, 2021), until recently have willingly supplied live exports into nations that do not match our animal welfare standards (www.rnz.co.nz), are known to operate in a manner

that would be considered unequal in terms of female acknowledgement (*Ministry for Women, 2021*) and have undoubtedly caused environmental damage (Foote, K.J., et al, 2015). Global-Rural, in its article on *Deconstructing the New Zealand Dairy Boom*, states that “It has brought prosperity to rural New Zealand, but also environmental problems, landscape conflicts and exposure to volatility in the global economy.”

Further to this, from a social aspect, a staggering 29% of New Zealand children live in a low-income household (*New Zealand Child and Youth Epidemiology Service, 2020*).

“UNICEF defines child poverty as children being deprived of the material, spiritual and emotional resources needed to survive, develop and thrive. This leaves them unable to enjoy their rights, achieve their full potential or participate as full and equal members of society. Here in New Zealand, children living in the most disadvantaged communities are more than twice as likely to end up in hospital as those from the most advantaged communities, and one in five children live in households without access to enough food or healthy food.” - Unicef

In comparison, a Dairy Farming Assistant (entry level) usually earn between \$42,000 and \$80,000 a year (Careers.govt.nz).

It could be questioned as to whether our story is actually one that we should be proud of – the land of milk and honey and also some of the worst child poverty statistics in the western world.

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*“I became convinced as a young woman that the violence endemic in New Zealand is related to the farming and meat and dairy industry, and its inherent brutality.” – Raised rurally.*

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In research by Annie Potts and Mandala White, *Cruelty-Free Consumption in New Zealand: A National Report on the Perspectives and Experiences of Vegetarians & Other Ethical Consumers*, 157 participants were volunteers sourced from around New Zealand. Of those 157 participants, 54 had either “grown up on farms or were closely associated

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“Mothers were birthing outside my window and I was listening to their labour pains all night, then watching them loving and cleaning their babies until my partner came with the tractor and the cage and took those babies away from them forever. I almost lost my mind with grief then; I couldn't believe what I had been so complicit in and what evil I had been closing my eyes and heart to while I lived there.” – Jessica Strathdee

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with farms owned by family, friends or neighbours”. This is 34.4% of the participants, all of whom were vegetarian, vegan, or a derivative. The study states that “the majority of participants who had grown up on or around family farms described negative, disturbing, and even traumatic farm experiences as children or teenagers.”

This research corresponds with my own, in which those who had the closest connection to dairy farming were in fact the most damning. One participant in my interviews specifically clarified that she would be not identifiable as she was

concerned for her marriage if her husband knew her thoughts on the dairy industry. All of those who identified as vegan within my research were closely connected to agriculture, either having connection to a family farm themselves or through their partner or living on a farm. Jessica Strathdee, the founder of the New Zealand branch of Mothers Against Dairy, was a dairy farmer herself and her partner was a 2IC on a Canterbury dairy farm.

“I do not support the export of our meat and milk, we go on about how there’s too many dairy farmers and too much nitrate leaching, when we are feeding other countries and not just worrying about feeding our own. We are using our natural resources to feed somebody else. We are doing this at the expense of our country.”

– Vegetarian, lives on a dairy farm.

In recent years there have been several research projects carried out in Canada, the United States of America and Brazil around public perceptions, concerns and the future sustainability of the dairy industry. I was unable to locate any such research specifically carried out in New Zealand. D.M. Weary and M.A.G von Keiserlingk (2017) discuss these topics at length and advise that one-sided education attempts from industry are unlikely to be successful, for several reasons, including that the proportion of those involved in agriculture is small compared to the wider public, that the public is “adopting an increasingly jaded view when it comes to the advertising efforts of specific industries, so the intended beneficiaries of educational efforts may be resistant to industry talking points”, and finally, “livestock industries cannot expect one-way education efforts (even immersive experiences such as farm tours) to resolve societal concerns about animal welfare” (*Ventura et al, 2016*).

I would add that in my personal opinion, this is not the appropriate time in New Zealand’s history to be attempting to tell nice stories about agriculture to our own people. I have no research to determine whether this hypothesis could be true, however I do note from personal experiences that since the Covid-19 Lockdown’s farmers are perceived to a) be essential but also b) continue as per normal in a Lockdown. Those of us on farm know this to be untrue, however we must also acknowledge that we do have certain advantages – such as seeing other people as we work, maintaining our own day-to-day routine, being supported in working with children alongside and most of all, being out in the clean, green, countryside of New Zealand while our fellow countrymen are inside homes without much area. One woman I spoke to during my research noted that the urban public was “jealous” of farmers. Tall poppy syndrome is a known element in our culture (*J Kirkwood and L Warren, 2020*) and my concern is that people who have had the majority of their movement prohibited for four weeks at a time and also a severe income change are unlikely to find themselves sympathetic toward those involved in dairy farming. Research would be required to determine the accuracy of this hypothesis.

The dairy industry has much to lose without the research to back a sound strategy moving forward. Story cannot be perceived as a satisfactory strategy with 34.4% of individuals identifying as vegan or vegetarian already having full understanding of our story. Story is, potentially, the result of dairy farmers long being guilty of confining to our echo-chamber – there are exponentially more jobs advertised in FarmSource than on mainstream vacancy platforms, and

statements such as “media items about dairying, across all forms of media, have remained more than 90% positive or neutral over the past three years of analytics” and said that “the problem is sensitivity bias among dairy farmers.” (Cowan, Lee. 2020) demonstrate this. Further investigation reveals that those statistics are taken from *all* media – including Farmers Weekly and other rural focused media. We are aware that rural media is not readily accessible to urban readers so is it therefore unfair to make that statement without statistics that allow for our echo-chamber bias in our own media.

Story may be successful in marketing to overseas consumers when attempting to sell our clean, green image, but the statistics show that it cannot be relied upon to persuade enough of the New Zealand public to maintain our social licence or increase our per capita milk consumption.

## Commercial Product Marketing

A very simple example of Commercial Product Marketing is this single piece of marketing for Oral-B toothpaste:



*Image Credit: Protor & Gamble*

We note from this advertisement that it answers, and does not answer, several basic questions.

### Questions Answered

1. Why do I need this product? *Provides all round protection from cavities, gingivitis, plaque, etc*
2. Is this a trusted product? *Over a million Australians have already tried Oral-B Toothpastes*
3. Is this product better than what I currently use? *"Go Pro" – suggests commercial quality*
4. Which company makes this product? *Oral-B*

### Questions Unanswered

1. What happens to the packaging?
2. What conditions do the staff work to in the factory?
3. How much money is the owner making?
4. Where does the owner live? Will his son inherit this business?
5. What chemicals are in the toothpaste?
6. Where are those chemicals sourced?

There is no nonsense with this marketing. You have a need and this toothpaste will fill this need. If a toothpaste company (not necessarily this one) chose to take the Story route it opens up all of the questions, and a lot more, in

the second column of Table 1. It must also be asked – why does it matter to the consumer where the owner lives? What he has for breakfast? Who his children and his father were?

In fact, this clever Proctor and Gamble advertisement was the first of a series of tactical plays in advertising, this one based on Tony Abbotts election win, using the phrase “You’ve Made the Switch” (Baker, 2013). One cannot help but see similarities between the strategy of “experimenting with using tactical events and new approaches to marketing to raise brand awareness and demonstrate the benefits of its products.” (Baker, 2013) and the use of works like “Be Kind” in our recent Covid campaigns and typical cruelty-free branding, discussed in this report under *the Power of Social Marketing*.

In assessing the marketability of dairy, I found data showing that dairy milk offers the most complete and nutrient-rich source of protein, for the lowest calories. We have a very marketable product with significant benefits to offer the consumer.

“Cow’s milk has been widely consumed around the world for hundreds of centuries and acts as an important source of protein. It acts as a wholesome complete food providing all major nutrients like fat, carbohydrates and proteins. Further, researchers have shown that the consumption of bovine milk can help the human body by providing wide range of host-defense proteins.

“Mammalian milk including cow’s milk is widely consumed due to its nutritional content. The mammalian milk has perfect composition of nutrients because it acts as the only source of energy to the neonates of different species. For example, human milk is the perfect source of nutrition to a newborn infant. However, when the human milk is not available cow’s milk is usually the substitute used for human consumption because of the nutritional similarities.” (Vanga, S.K., Raghavan, V. 2018).

Within New Zealand it could be stated that land ownership is more land stewardship, whether it’s through the purchase of a property through a development block that requires certain features of a new dwelling or in pest control where numerous stakeholders must be engaged before activity can take place. If the New Zealand public is telling us that they are not certain that we are doing the best thing for our land then we must share openly what we are currently doing, our intentions to solve this, and also what the investment in the land produces in terms of beneficial product.

The question we must ask the public is – *where does the land investment become too great in order to produce nutrient dense product for the wealth and consumption our people?*

## The Power of Social Marketing

Social marketing is a newer strategy than the more traditional Commercial Marketing, having been developed in the 1970s by Philip Kotler and Gerald Zaltman when they determined that the marketing concepts and techniques used in the promotion of products can also be successfully applied to the promotion of social objectives, and can "sell" ideas, behaviors and attitudes (Kotler, P., & Zaltman, G. 1971). Social marketing has become successful across a number of industries such as tourism (for biosecurity campaigns), health (in the Covid response) and in our dairy industries competing markets (such as veganism). Perhaps the finest example of social marketing that we will see in our lifetime is the Covid-19 communications. Social marketing is often used in the marketing of health services and influencing behavioural change for social good.

One such social marketing campaign is that of iAnimal – Using Virtual Reality to Increase Plant Based Eating by Caryn Ginsberg. The purpose for the iAnimal programme is “to motivate people to reduce and eliminate meat in the diet” because “doing so advances better health, preserves the environment and reduces animal suffering”. It “suggests an opportunity for health advocates and animal advocates to learn from each other in helping people eat differently”.

The project is impressive stating that it, “directly targets influencers for policy and social norms, such as government officials, celebrities and the media.” Further to this, “The programme...prioritizes Ivy League schools in the U.S and similar institutions internationally in the hopes of reaching young people who are likely to be among the government, business and professional influencers in the future”

Personally, I question the ethics behind such a campaign given that there is conflicting research behind the reasons given to validate the project. One could also question the ethics behind such pressure on those from lower socioeconomic homes who may not have access to sources of replacement nutrients. (Ranford, 2018)

Animal Equality stated at the 2016 World Social Marketing Conference that they considered “the programme successful in engaging young adults to reduce or eliminate animal products” and was working on plans to feature Dairy Cows. They have since done work on this area and make a plea for us to “reduce their suffering, help the planet and improve our health”.

Given the success rate of between 60-80% of followed through commitments to consume fewer animal products, these social marketing campaigns are a risk not only to the consumption of our product but also the social licence needed to produce it.

Social marketing uses different language, not unlike the words we see in the images below:



In these images we see words and phrases such as “Cruelty Free”, “Be Kind”, “Happy, Healthy” “Dairy Free + Climate Positive”, “Shop with Your Heart”. These clever phrases touch more than our minds, they relate to our values. I value a good climate; does that mean that I must be dairy free? We have been told consistently since early 2020 to “Be Kind” – it’s in the preschool newsletters, on t-shirts, the Prime Minister reminds us... Cruelty isn’t Kind, so therefore I should “shop with my heart”. If I don’t shop Cruelty-Free, does that indicate that I am Cruelty Positive? We see the words “cruelty-free” synonymously connected with an animal free diet, inferring that therefore any and all animal farming practises are cruel. Cruelty is defined as:

Cruelty is behaviour that deliberately causes pain or distress to people or animals

Synonymous with brutality, spite, severity, savagery (*Collins Dictionary*).

Cruelty then, directly opposes the Five Freedoms, internationally recognised as the gold standard of care for our stock and arguably demonstrated well in New Zealand’s dairy industry. While cruelty-free may be an appropriate term for overseas dairy and meat production, it would be difficult to prove that it is an appropriate term within New Zealand given our high animal welfare standards (lack of tail docking, medical care, etc), lack of disease (allowing animals to have the company of their own kind from birth) and pasture-based systems (limited wintering barns, feedlotting, etc).

# Five Freedoms

The Five Freedoms are internationally accepted standards of care developed in 1965 by Britain's Farm Animal Welfare Council. The Five Freedoms ensure that we meet the mental and physical needs of animals in our care and provide us with important knowledge to find the best possible homes.



- 1. Freedom from Hunger and Thirst**  
by ready access to fresh water and diet to maintain health and vigor.

- 2. Freedom from Discomfort**  
by providing an appropriate environment including shelter and a comfortable resting area.



- 3. Freedom from Pain, Injury or Disease**  
by prevention or rapid diagnosis and treatment.

- 4. Freedom to Express Normal Behavior**  
by providing sufficient space, proper facilities and company of the animal's own kind.



- 5. Freedom from Fear and Distress**  
by ensuring conditions and treatment which avoid mental suffering.

Image Credit: Humane at Home: The Five *Freedoms* [marin humane.org/humane-at-home-the-five-freedoms/](http://marin humane.org/humane-at-home-the-five-freedoms/)

This research project glances the surface of the competing products and industries. The New Zealand dairy industry is opposed by both social marketing aimed at reducing the consumption of animal products, along with the commercial marketing of dairy-free alternatives.

"If Apple was like everyone else a marketing message might be: We make great computers. They're user friendly. Want to buy one? ...Here's how Apple actually communicates: everything we do, We believe in challenging the status quo, we believe in thinking differently. The way we challenge the status quo is by making our products beautifully designed, simple to use, and user friendly. We just happen to make great

computers. Want to buy one? The goal is not to do business with everybody who needs what you have, the goal is to do business with people who believe what you believe.” – *Simon Sinek*

“People do business with companies that believe what they believe because of our strong tendency to want to align our actions with our self-perception. This is why people who identify themselves as Republicans or Democrats, will vote against their self-interest. We don’t want to experience what psychologists call cognitive dissonance – “the uncomfortable feeling of holding two contradictory ideas simultaneously. Therefore, companies that have a strong identity often become very strong brands.” (*Charles Sipe, 2010*)

It doesn’t take much analysis of the dairy industries competing products to see that our competition have honed in very well on values driven marketing and that their choice of words reflects beliefs and morals that the majority of us would like to believe that we live to.

In research by Annie Potts and Mandala White, *Cruelty-Free Consumption in New Zealand: A National Report on the Perspectives and Experiences of Vegetarians & Other Ethical Consumers* (2007), it was interesting to note that some chose to consume dairy products in the hope that organically farmed produce was “less cruel”.

“The vast majority [of milk] is a brutal commodity, less so than meat, although some organic sources are far more humane than a typical dairy farm”.

“I’m aware male calves get killed to keep the dairy industry going so I’ve compromised. I try to buy organic milk where possible and affordable”.

“I am concerned that cows should not be exploited for dairy products and trust that farming practises in milk production are appropriate to an enlightened manner of treating animals”.

These comments are very interesting, given that mammalian species will only produce where there is offspring and the method of getting a cow in milk does not change, whether organic or not.

The Organic Dairy Hub, New Zealand’s only 100% Farmer owned Organic Dairy Co-operative, makes no comment with regard to calves except to say that “Our farmers strive to ensure their cows have the very best life so they enjoy the freedom to express natural traits.” Research conducted in America shows that conventional producers remove a calf within 30 minutes to six hours after birth where organic report separation six to twelve hours after birth (*Pempek et al., 2017*).

It could be that organic dairy is benefitting from the overarching organic social marketing campaigns.

## Social Licence – What is it and Why is it Important?

The obtaining and maintenance of social licence is of critical importance to a broad range of industries and businesses, including aquaculture, agriculture, animal and human disease control, mining, construction, manufacturing, etc, and is recognition of the values, opinions and beliefs held by those impacted by the activities of the industry, business or project. Granting and maintaining of social licence indicates that there is a shared vision toward the project and an acceptance of it's continuance. It is a crucial cornerstone of the society upon which our nation is built that individuals and groups have a voice and are heard.

“Social licence refers to public acceptance of commercial activity. It is not a legal permit, but an indication of community approval and trust... The term implies that communities have power to grant or withhold approval of commercial operations, but public usage of the term has been dominated by industry and central government voices. They frequently state or imply that industry already has social licence and just needs to maintain or improve it, often without reference to community groups and iwi.” (Sinner, J. 2019).

The Community involved may refer to the public, stakeholders, local population, iwi and those otherwise impacted by the activity. It is recommended that businesses that are interested in investing in activities where social licence will be necessary do background work before commencing in order to greater identify and understand the “social structure, issues and vision of the various individuals, groups and organizations in the network that collectively form the ‘community’”. (Shingletpit Consultants Ltd, 2020). This coincides with the approach taken in other industries, such as pest control, so that an awareness can be reached of what will and will not be palatable and for what reasons, along with the long-term vision of those involved and where this project fits in that vision if at all.

Research indicates some clear areas where the social licence can be at risk, and this is of particular relevance to the dairy industry (Shingletpit Consultants Ltd, 2020). Note emphasis authors own.

“Difficulties arise most frequently when companies are unable or unwilling to make the nominal investment to make things work. The most common problems encountered in our experience are: ...

The company confuses

- Acceptance for Approval
- Co-operation for Trust
- Technical Credibility with Social Credibility.”

Measuring the Social License



© Sociallicense.com (2010)

There are four stages identified in the Social Licence spectrum for businesses: Rejection, Acceptance, Approval and Co-ownership as indicated in these images. It could be argued that in order for New Zealand dairy to perform to its greatest capacity we would need co-ownership with our stakeholders and communities, as they tell our story to both the domestic and the international market, along with sharing their own visions for the future of our land and political support for necessary activities.

LEVEL OF SOCIAL LICENCE	SYMPTOMS/INDICATORS
<b>WITHHELD / WITHDRAWN</b>	<b>Shutdowns, blockades, boycotts, violence / sabotage, legal challenges</b>
<b>ACCEPTANCE / TOLERANCE</b>	<b>Lingering/recurring issues &amp; threats, presence of outside NGOs, watchful monitoring</b>
<b>APPROVAL / SUPPORT</b>	<b>Company seen as good neighbour, pride in collaborative achievements</b>
<b>PSYCHOLOGICAL IDENTIFICATION</b>	<b>Political support, co-management of projects, united front against critics</b>

© Sociallicense.com (2010)

We see that without social licence an industry, business or project could potentially continue however the ability to do so would be both greatly hindered and arguably more expensive, without even the further examination into the impact on ability to meet staffing requirements under opposition.

A quick glance at the table shows that the New Zealand dairy industry has shifted on that spectrum as community beliefs and values, along with education based on scientific discovery, have shifted and the industry has not responded with a social licence maintenance plan at the necessary pace. This is indicated in the interview responses for this report based on generation.

The DairyNZ Public Perception surveys show a decrease in positive public perception from 71% to 58% over the years 2010 to 2019, with a blip up to 62% after the first Covid Lockdown in 2020. We obviously have yet to see if this will be sustained. Although these figures are reported on and celebrated, there needs to be further investigation into what those figures mean and what support looks like and whether that can be relied upon as a measure of the industries' social licence.

## The Current State Globally

Research conducted overseas shows interesting results, including that the story method, assumed to be the answer to the lack of social acceptance, was actually not going to be effective.

To my own knowledge, specific research has not been conducted within New Zealand testing the hypothesis that greater dairy farming education and awareness leads to greater dairy farming acceptance, and this presumption could be challenged by the data from other studies such as those referred to in the section of this report titled *“The Current State Domestically”*. Although there is some data relating to Open Days, these results are on a small scale and remain unpublished and also taken during times of year when less controversial activities are taking place – i.e. in the summer, when calving is well finished on the majority of farms, there is no crop or winter grazing taking place and almost all young stock are at grazing.

In Canadian research, it is noted that “People within the livestock industries sometimes feel that the public is ignorant of farming practises, and greater acceptance of current practices could be achieved if there was a concerted effort to better educate the public about

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*“livestock industries cannot expect one-way education efforts (even immersive experiences such as farm tour) to resolve societal concerns about animal welfare” Ventura et al 2016 p.15*

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farming. Although it may be true that knowledge about agricultural practices is often low, there are several reasons to believe that efforts to educate the public are unlikely to improve acceptance of current practices.” (Keyserlink, M Von., Weary, Daniel. 2017)

In this study participants were surveyed before and after a self-guided tour of a dairy farm. The result was that with more exposure there were more concerns, including “lack of pasture access and early separation of cow and calf.” Before going on farm 28% had stated that they were not confident that dairy cattle have a reasonably good life. Afterward, 32% were not confident. 30% had been Neutral before going on farm, as opposed to 44% after exposure.

Research conducted in Brazil and the United States of America showed similar outcomes.

“Negative attitudes expressed by the public toward animal production have been argued by some to be a consequence of ignorance of the realities of animal production (Capper, 2011; You et al., 2014; Pieper et al., 2016). Many working within farm animal production thus argue that educating the public should result in greater acceptance of current management practices (discussed by Ventura et al., 2016). This apparent disconnect between how members of society that are not routinely involved with animal production and those that are actively involved view animal agriculture may be a consequence of different viewpoints. Reasons in support of, or opposed to, a particular farming practice may be science-based, practical, economic, or ethical in nature (see review by Weary et al., 2016).” (M.J. Hötzel et al., 2017, p 4150)

While there are known differences between dairy farming overseas and in New Zealand, concerns such as pasture and separation of cow and calf are shared between our industries and between all forms of milk production whether it be branded as organic, A2A2, etc.

“The dairy industry has obviously driven in large part by economics, and there’s been...quite a bit of concern about getting their heads wrapped around the environmental aspect of sustainability but really the social pillar, for the most part, has been silent.” *Marina von Kyserlink.*

The *Final Thoughts of the Working Towards a More Socially Sustainable Dairy Industry* report suggests that rather than “focussing on one-way industry efforts to “educate” the public we should develop methods of facilitating constructive, informed engagement among stakeholders. We suggest that this approach will likely to be more effective in identifying shared concerns and potential solutions likely to find general appeal.”

Indeed, my own experience in community engagement for disease operations agrees with this approach, the key difference being what is considered public and private land and how the citizen of New Zealand may view the two. With increasing awareness of environmental impact, in particular, reaching beyond the farm gate there is a growing need to involve the wider public with decision-making on farm as there are impacts to the citizen themselves. Publicly available Stakeholder Engagement reports for pest control outline identification of stakeholders, various methods of engagement and genuine consultation around timing, appropriateness or otherwise of method, area, etc. (*Environment Canterbury, 2017*). At the time of the writing of this report I could not locate any similar structured engagement with regard to the public and the dairy industry.

## The Current State Domestically

While it could be obvious to hone-in on specific like products, such as Meadow Fresh milk as opposed to Lewis Road Creamery, or A2A2 vs Regular Milk, perhaps of far greater impact are the Vegan and Vegetarian movements as these effects the overall industry as a whole and show a belief system that is implemented deeply enough to influence financial and consumption choices.

### Vegetarianism

I mention vegetarianism in this report as dairy farmers obtain a significant portion of income through supplying the meat market, i.e. cull cows and mating bulls sent to slaughter, bull calf sales, etc. Financial data that I reviewed from seven dairy farms across several regions shows that cull animals and calf sales to beef traders contribute an average of 8% of the overall profit before milk supply company dividend.



“On average, dairy farmers pay around \$400 to B+LNZ annually on cull cows and other animals they send to slaughter. Therefore B+LNZ takes responsibility for delivering value to dairy farmers “beef business”. (McIvor, 2019). Although Beef + Lamb NZ takes responsibility for managing this portion of the dairy farmers marketing, it is worth noting within this research. The meat free eating ‘trend’ has increased from 2017 at 7% to 10% in 2018 and 15% by 2019.

### Veganism



We are the fifth most popular nation in the world for veganism. “...quite a worry for a meat-driven economy.” – Chefs Pencil.

Images Credit: Colmar Brunton\_Better Futures 2020 Presentation

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*If we did move to plant-based protein diets, most of us could become quite sick” – Shalome Bassett (Ranford, 2018)*

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Even easier to see, are these photographs taken at my local Countdown store. These photographs show the “Health Food” section, in which the products are labelled Dairy Free.

This is intriguing given that we know that Dairy Milk offers the most nutrients of any milk product. (Vanga, S.K., et al., 2018).

In fact, there are debates as to whether nuts and plants can even be referred to as producing milk as by very definition they are not. Further to this point, raw cows milk is processed to remove risk of disease (salmonella, e coli) not because it requires

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*Sales of dairy-free milk had increased by 14% and dairy-free cheese sales had increased by over 300% in the previous six months*

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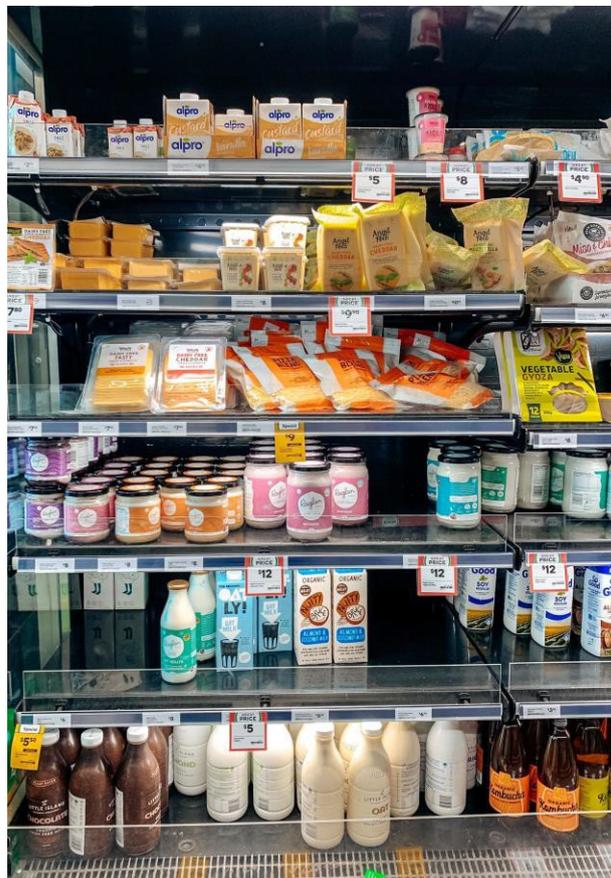
further nutrients. And yet, in the very country that produces this nutritious product, the marketing is so poor that the competing milks are considered “Health Food”.

In October of 2019, Countdown released information (Stuff, 2019) to say that sales of dairy free milk had increased by 14% and dairy-free cheese sales had increased by over 300% in the previous six months. Plant based meal solutions had increased overall by 36% in the previous year.

Kiri Hannifin, Countdown's general manager of food quality and sustainability, “said there had been a growing retail trend in which people were interested in buying and eating food that was good for them and good for the environment. Probably the primary driver is health, but the second driver snapping at its heels is sustainability and environmental concerns around our planet and its long-term health.”



Above: Countdown, Rolleston, Canterbury. The Health Food section.



Above: The products contained within the Health Food Section – Almond, Oat, Coconut, Soy milks, and a range of proudly labelled “Dairy Free” cheeses, custards, etc.



Image Above: The Not Your Mum, Not Your Milk campaign outside the Dairy Industry Awards Evening in Hamilton, 2021.

New Zealand’s Bestselling book of 2020 was “Supergood” by Chelsea Winter. Supergood is a recipe book of plant-based recipes. Under *Why You Need This Book* the first item that the author lists is “Do you cook for anyone who can't

(or won't) eat dairy, meat or eggs?" Over 30,400 copies were sold in 2020 alone, and the Top Five Cookbooks of 2020 were all meat-free (*Brooks, 2021*). Google Trends also noted that the largest spike in searches was for the term "Vegan Christmas Recipes" (*Brooks, 2020*).

Chelsea Winter has 421,000 followers and must be considered to be one of New Zealand's most trusted Chefs. Interesting then, to observe carefully the language that she used in her Facebook post where she discusses her journey (abridged quotation from Chelsea Winter's FB post of 6 June 2021, emphasis in bold by the author):

I'd love to share a little about where I'm at now, because life has brought about some big changes for me over the past few years... especially when it comes to what I'm cooking and eating. Before, I honestly consumed more meat, dairy and eggs than anyone I knew. I was a country kid, bit of a tomboy and a voracious carnivore – dinner wasn't a meal to me without meat. I didn't really think twice about where my food came from (I think subconsciously I didn't really want to know). 'You don't win friends with salad!' I sang with glee. Cheese was integral to my life and I basically scorned people who didn't cook with butter. Up until a few years ago, I'd never really cooked a meat-free meal – I was confused by vegetarians. And plant-based food? Forget about it! In a twist of irony, I used to be triggered when vegans made comments on my posts. I took it so personally and could only see my own perspective. My identity was tied up in the validation I got from my recipes and I couldn't really handle any criticism. I wanted to please as many people as possible and at the end of the day, I guess my self-worth was entwined into this meaty/cheesy narrative too. For a long time, this worked great and I was happy. But, my soul was starting to niggle at me with ever-increasing urgency.

As I understand it, it's a natural part of the human journey for us to evolve and grow, which happens in different ways and at different times for each of us. For me, the last few years have pretty much been about that. After five back-to-back cookbooks and endless hustle on all fronts, I was seriously burnt out and feeling a bit empty. So I took a break for a couple of years and spent that time embracing the process of *s l o w i n g d o w n* and creating space to just be. I'd also stopped drinking, which allowed for further clarity. I learned to meditate (it took ages but can't recommend enough), and I slowly learned to intuit what actually felt good for my body, heart and soul rather than just going along with the status quo I'd been conditioned to accept from a young age. I became a lot more conscious of the world around me, of others, and I really started to pay more attention to what I was eating. I knew there was a lot I had to face that I'd been turning a blind eye to.

So I got really curious and did some serious research. I talked to credible people and organisations whom I trusted. I went deep. The more I learned, the harder to stomach it all became. It took a long time to process it all, to be honest. I was scared for the planet, I was scared for the health of humanity, and (most shocking for me) I could really start to see the true cost of large-scale animal farming and what's required to produce enough meat, dairy, eggs and fish to satisfy the appetites of the world's rapidly growing population. Research consistently proves that the massive amount of animal products

we are now consuming is having a negative impact on our health, is no longer sustainable, and is for the most part staggeringly unethical.

I've always had a strong connection with animals and taken pride in identifying as an animal lover. But finally after 30 odd years, I realised my actions simply weren't aligned to my morals, to the point it was getting a bit awkward. I arrived at a place where I could no longer ignore the fact I was honouring some animals and wilfully ignoring/inadvertently helping to cause suffering and oppression of millions of others (animals whose lives are carefully kept out of sight & mind to strengthen the disconnect between what's on the shelf and how it got there). It's much worse than I thought and I believe that one day, humanity will look back on these times and weep. I'm well aware I've been a big part of perpetuating this paradigm through my work – for whatever reason that's been part of my journey. Lordy, I'm far from perfect and I know that! But going forward, I do want to be part of a conscious change for better. To be fair, it's taken me a good few years for me to transition to a plant-based diet (along with my partner Douglas). It started off slow – one because I wasn't ready to just stop everything cold turkey (I really loved meat); and two because I had no bloody idea what to cook! Nowadays, though, I'm a veritable beast-mode plant-based powerhouse. A whole new incredible world of food has opened up that blows my mind on the daily, and I can feel my body rejoicing it's getting the fuel it actually wants. Every morning I wake up happy knowing I'm eating the best food of my whole damn life and I've never felt more alive, joyous or clearer of mind. Never been more comfortable in my own body. My pregnancy was beautifully healthy and our two year old Sky is bright-eyed and thriving. It's such a joy to be in the kitchen for me nowadays; every meal at our place is a celebration of gratitude and good vibes, and our fridge is a friendly place. And this is only the beginning! And best of all, I get to share it all with you guys! ...Guys, the most important thing here is that I want you to know I genuinely hold no judgement over anyone else's choices; in life, in general, and especially around what they eat. I mean seriously how could I possibly, given my history and the fact that for so long it was me leading the charge?! We're all on our own unique paths with our own prerogatives. I don't expect everyone to suddenly change/agree/share my views, I'm not naïve enough to think we're all on a personal plant-based trajectory. We all need to follow your own hearts and do what feels good, and respect each other in doing so. I'll always hold ALL of you with love and compassion. Love and compassion is the whole point here - its what's going to heal this mess."

What is interesting in this narrative is that Chelsea's choice of words coincides with those that we see associated with an opposition to dairy and meat, for example "our fridge is a *friendly* place".

While we could look at this statement from many different angles, let's look at this purely from a dairy marketing perspective. In a few words, it's a disaster. Social media usage in New Zealand currently sits at 82% of the population (*statistia.com, 2021*). Chelsea Winter has over 421K followers on her Facebook page and 99.6K followers on her Instagram. These platforms are not visible only to New Zealanders but to anyone with an internet connection and so

also to our overseas market. Chelsea Winter has had a very successful and prominent career, winning MasterChef, writing successful and bestselling cookbooks and being a household name for years. She is someone that we trust – that I trust - to advise us in our kitchens.

We also know that people will spend and consume strategically in the service of affiliation (*N. L Mead et al, 2010*), even to the point of consuming products not of preference in an effort to grow and maintain social connections. In this way, social media and the affiliation of identifying as a specific eater is of relevance to the dairy industry.

To my knowledge, the dairy industry as a whole did not respond to this Statement.

As you read this, can you think of an influential New Zealander who has spoken recently in support of the dairy industry? When did you last read about the nutrient value of milk and how that can provide for our families? When was the last time you looked at your social media and saw an influencer with a milk moustache or even a full-cream coffee?

## The Research

As stated earlier, this research was conducted through interviews either in person or by telephone.

The interviews were comprised of 24 standard questions and were conducted in person or over the telephone. It was important that I removed bias – anyone talking to me was only one step removed from a dairy farmer – so I recruited two assistants to also conduct interviews on my behalf. These two assistants were of different generations to my own and one lived in a different region. Both assistants were provided some interview techniques, for example to remove any reaction to an answer, and the standard list of questions.

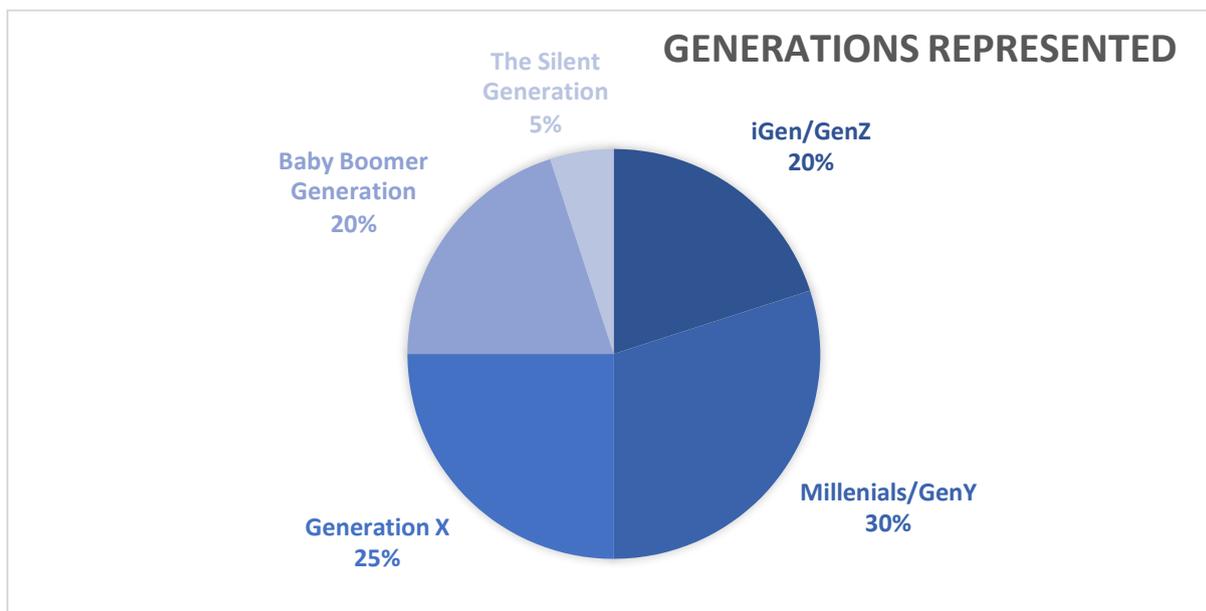
The only requirements for those interviewed were:

- The respondent must be living in New Zealand at the time of interview and
- The respondent must not be dairy farming themselves.

While there were not enough respondents to consider these interviews to be representative of the population it is important to see some general statistics to provide background as to who the quotations are from presented later in the report.

### Generations Presented

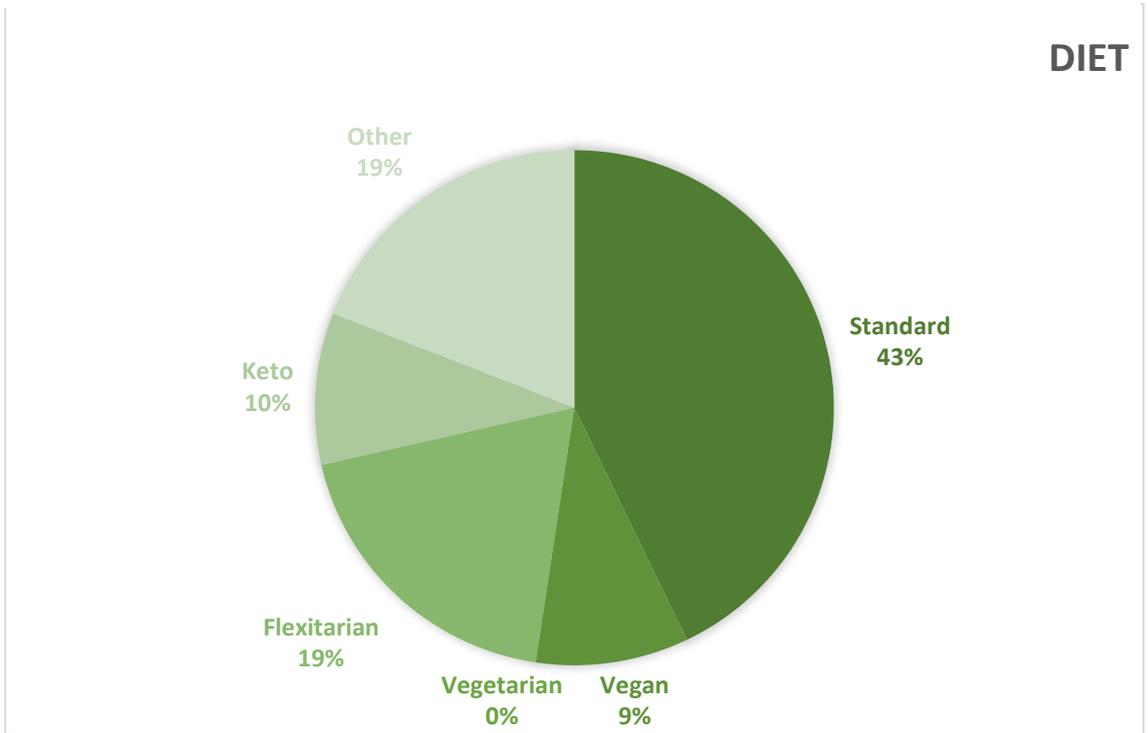
Pleasingly, there was good coverage of generations across the respondents.



## Diets

Diets of respondents showed some interesting figures. Other includes those who consider themselves to have a standard diet, however upon further discussion in the interview revealed that they do not consume cows milk products, i.e cows milk. This was the first obvious example of survey and interview respondents potentially using a

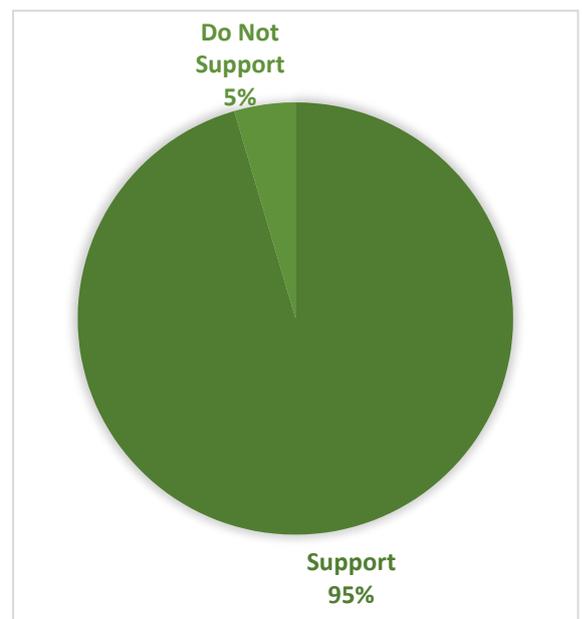
different language or understanding and therefore providing compromised data, i.e. that people can believe that they have a standard diet when in fact they have removed an entire set of products. Interestingly, A2A2 milk was not



considered as a substitute for those who cited health reasons such as intolerances. As the graph demonstrates, from our interviews less than half of the respondents held a traditional standard diet.

## Overall Support for the Dairy Industry

After the preliminary questions around generation, location, etc, the initial question in the series around agriculture was "Do you support the dairy industry?" specifically requesting a "Yes" or "No" answer only. This was purposefully asked before the more in-depth questions around specifics of the industry to get the first reaction. The respondents to the interview showed overwhelmingly that they support the dairy industry, with 95% stating Yes.

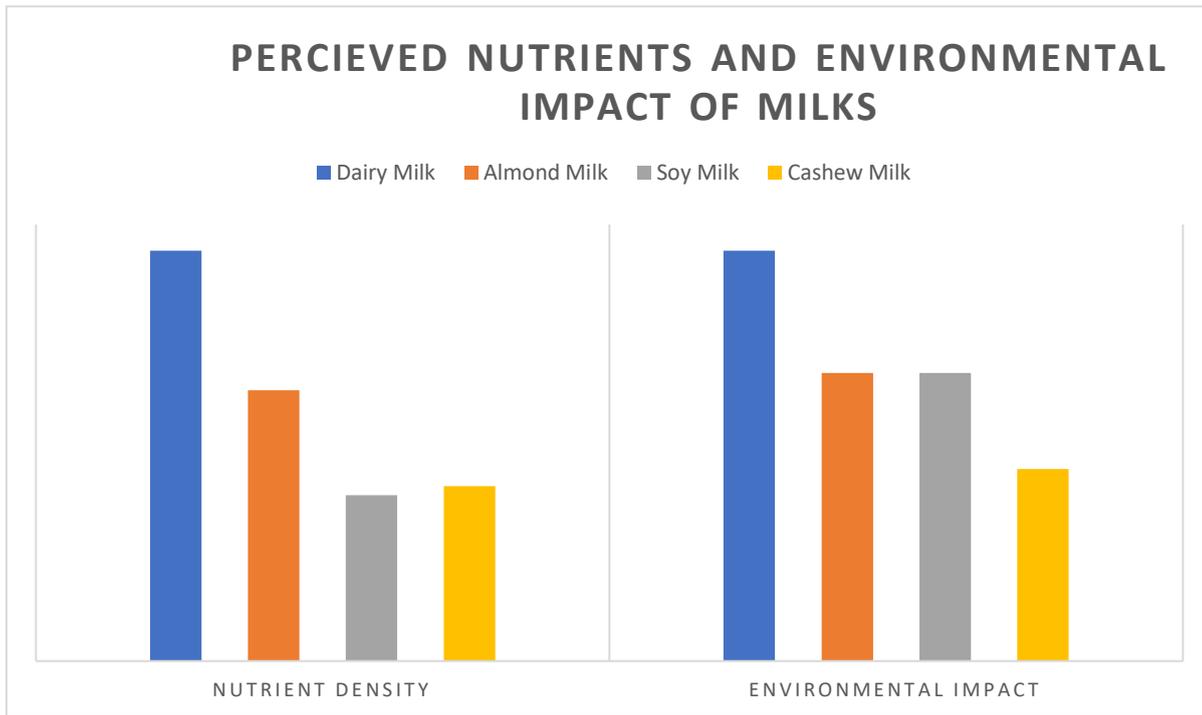


## Perceived Nutrients and Environmental Impact of Milks

Respondents were asked to rank four milks in terms of nutrient density and environmental impact. Dairy milk was ranked as the most nutritious, with the Baby Boomer generation having the clearest understanding of the nutrient value of milk. The other generations showed very little actual knowledge behind their answers, stating guesses like

“nuts are super nutritious so would probably be high in minerals”, “cashews are very good for us so I imagine the milk would be as well”.

Also of interest was how little in the lead Dairy milk placed, given that it’s nutrient profile clearly outranks other milks.



Dairy was the highest ranked in terms of environmental impact, and the following questions around the impact of dairy were designed to understand what areas of the environment respondents found particularly concerning. However, when analysis of the results began it became apparent that dairy was barely showing as being perceived to be responsible for leading areas of environmental concern such as carbon emissions, freshwater issues, global warming, etc. We see from the graph dairy responses show only on the freshwater issues. This resulted in a modification to the interview questions and follow up, directly asking the respondents what concerned them about the environmental impact of dairy. The answers were themed around cows being animals.

“I would assume that dairy would have the greatest impact since there are animals, rather than the others which are just processing off a tree.”

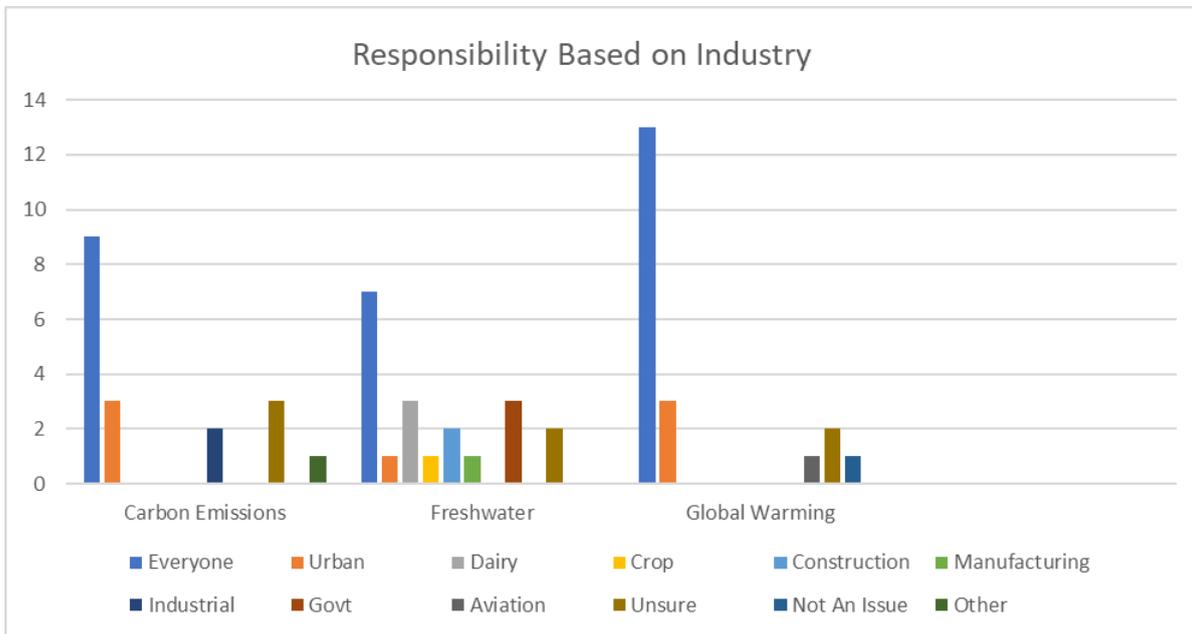
“I know that dairy has an animal impact on the environment.”

“Dairy is the only option which uses animals in it’s production”.

“Vegetables and nuts would have the least environmental impact.”

“I would assume that dairy would have the greatest impact since there are animals.”

This is of course problematic given that the premise of *story* is that cows feature largely in that story. It is also an indicator that the social marketing that questions the use of animals in large scale food production has been successful. Animals alone are not a reason for environmental damage, a soundly educated response would go into more detail.

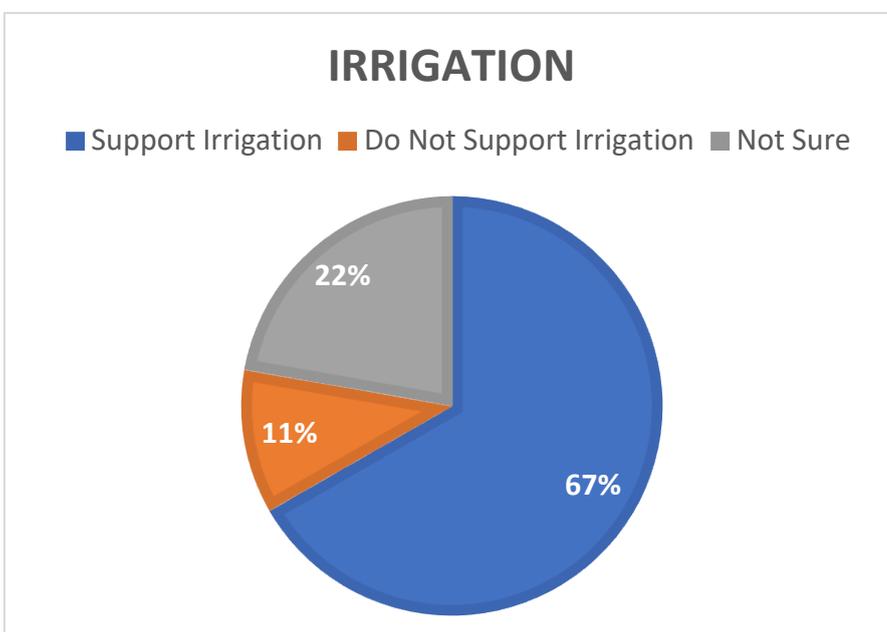


As well as this, the majority of respondents did not disagree with irrigation.

“Well if they don’t irrigate then there is no feed for the stock. It is vitally important. I presume it either comes from rivers or underground bores.”

“Yes, without water the land becomes useless. It makes no sense as a nation to support dairy farmers but then prevent the use of water. That’s like supporting preschool centres but restricting their access to toys.”

“I understand why other places such as Canterbury have to.”



“I see a lot of irrigators around Canterbury so they must use a lot of water but it is good for the grass so yes.”

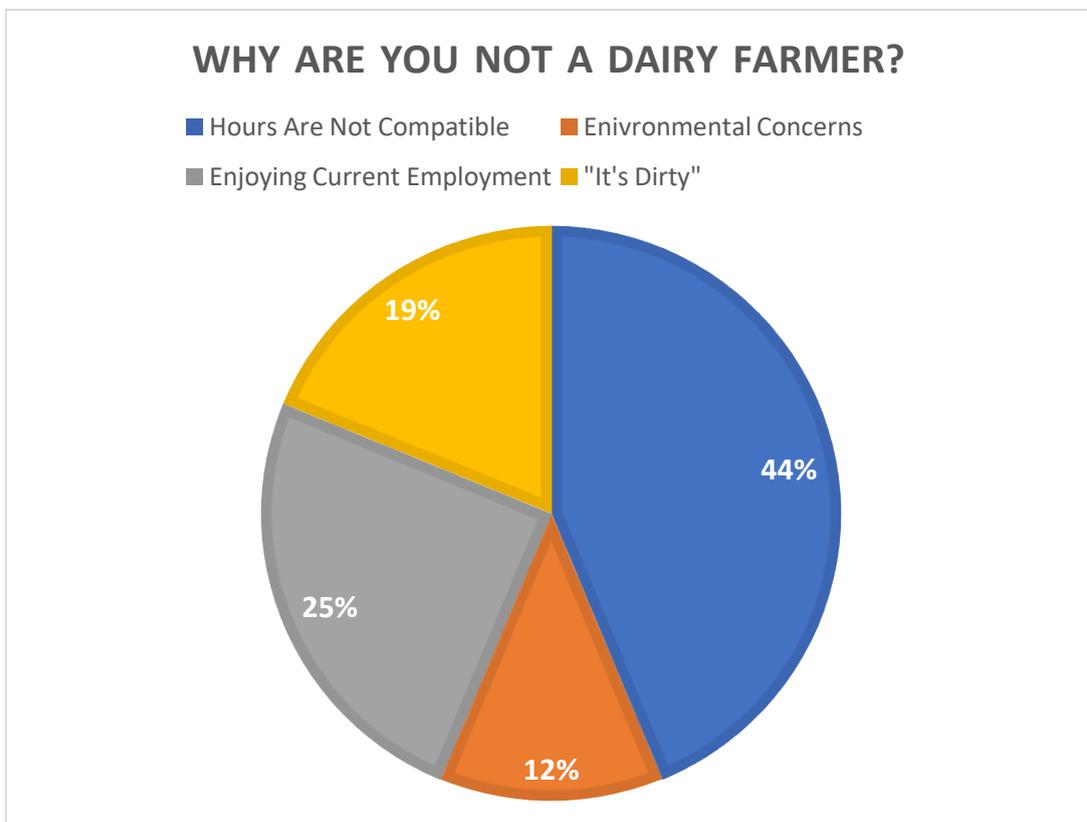
“Yeah I do cos I don’t know any other way that you can make the grass grow really. I know It’s hard on the rivers, draining the rivers and lakes and the fact that they’ve got to use electricity to run

them, so yeah. The only thing I can think of is different grass that can handle the environment which would be different for different parts of NZ.”

### Why Are You Not A Dairy Farmer?

We also asked respondents “Why are you not a dairy farmer?” with a multichoice range of answers, or other. All answers landed on one of four

areas, the most prominent being that the hours are not compatible, followed by enjoying current employment and that “it’s dirty”. It’s dirty was not one of the multichoice answers provided and was volunteered by respondents. This question was asked to gauge the seriousness of environmental concern – i.e. if the money is good and conditions are favourable, would respondents consider overlooking some of their



environmental concerns? Overall, I was surprised by the seeming lack of genuine concern and understanding around environmental issues given the high ranking of dairy milk as having environmental impact.

### Quotations from Those Who Support The Dairy Industry

Of keen interest were the comments regarding the dairy industry from those who claimed to be supportive. From this research, it appears that the New Zealand public feels that they can be both supportive of the dairy industry and not agree with all practises and not consume dairy products.

This then raises the question of what it is that these people are supportive of and supports the idea that although we see favourable percentages of support from the New Zealand public this does not necessarily translate to sales or

other usual measurements of support. The MPI report, *New Zealanders Views Of The Primary Sector*, also acknowledge this:

“The quantitative results showed that many New Zealanders (both urban and rural) still hold overall positive views about the primary sector, however, over the last 10 years or so this positivity has decreased. The qualitative research suggests this was largely because of the critical role people felt the primary sector played in the economy.”

This was where it became clear that the New Zealand citizen has two very important parts to play in our dairy industry – that of the consumer and that of the land stakeholder.

### Quotations from Those Who Support The Dairy Industry - On Industry

“We do need better pricing for our products. That pricing needs to come from the corporate giants, the Fonterra’s and Synlait’s because they seem to be doing quite well but farmers are still living hand-to-mouth.”

“I do think that the dairy farm industry needs to look into different ways of dealing with things. Even just like different ways to irrigate, even the bobby calves, if anyone – no one really has looked into – better alternatives to those sorts of problems. Things like fencing, I know talking to different people that there are still farmers that still have their cows in rivers and stuff. I don’t know if people go around and look at that stuff or we just take our word for it.”

“The Industry [bodies] walk around with their \*\*\*\*\* hanging out because they think they’re all that.”

We need to share more than the pictures of cows in grass because we know that we have grass here, we need to show how we differentiate from overseas in our farming, rather than glossing over everything and saying we’re perfect. People appreciate honesty. We have to demonstrate that no industry is perfect and we have to find the happy medium.”

“The dairy giants as a whole are \*\*\*\*-monkeys. They don’t care about their people. What industry giants were supporting RST before RST became big? RST have to fight really hard to be able to do the work that they do.”

“I think we could do better with the feeding situation. I watch country calendar and there are these farmers further down south that plant out their fields with flowers and other crops and it’s more nutrients for the cows. I feel like sometimes the dairy industry does the bare minimum.”

“AI was always quite distressing to me because to me it feels like rape, but then it was actually put in perspective that this is more pleasant than being actually raped by a bull.”

## Quotations from Those Who Support The Dairy Industry - On Bobby Calves

“Very upset. I disagree with every single aspect about it. Wholeheartedly disagree, it’s miserable and appalling and I don’t see any reason for it...It’s like having a child and having a girl but killing it because you wanted a boy”.

“What I struggle with so much is that if you wish to benefit from calving and you are not in a position to accommodate the calves...then you shouldn’t be producing them.”

“Disgusting. It’s like eating baby meat, it’s so soft and squishy. Some people are into it but I think it’s disgusting.”

“It sounds very sad. They get killed.”

“No, it’s sad.”

Those who were not adamantly against were reserved.

“Because they’re so cute and little it makes me sad, however I can see that they provide a lot of good and research and stuff. Baby animals do my heart in.”

“Why do the public need to know? I think it’s a necessary thing, you need more cows than bulls so whether they keep the bulls until they’re a year old and sell them to the abattoir I don’t know.”

“I mean I think it’s pretty sad but what else could you do with them? I don’t really know what the alternatives would be. No, I don’t support the bobby calf industry.”

“Bit rough for the calves but when dairy cows are pregnant they produce more milk so are helpful in that way.”

## Quotations from Those Who Support The Dairy Industry - On Early Removal of Calves From Their Mothers

“I would find it personally distressing if I was on a farm and saw it.”

“It makes me super sad because I have seen little calves, and they call for their mothers. Not so young, they need more time to be with their mothers.”

“No.”

“No, it does not sound very nice.”

“Doesn’t sound that nice so no.”

“No, that’s not cool either.”

“No. I get that it’s a very important element and that without it we probably don’t have an industry without it, at the end of the day we are doing it for our own selfish benefit. The justification that the cows are interested in the calves by day four anyway just doesn’t feel like it’s enough because again, you are the one who impregnated the cow when she may not have chosen to have the calf.”

“I hate the way they are taken away from their mothers. I feel for the mums. I do understand it, couldn’t they have surrogate mother cows or something?”

Even those who do not oppose the removal of calves do so pragmatically but acknowledging that it is not ideal.

“A necessary downside”

#### Quotations from Those Who Support The Dairy Industry - On Milk

“It’s watered down a heck of a lot. When we had it it was pure. I mean, we saw where it was coming from and it was nice.”

“I don’t know how much milk has changed since I was a kid. There was a place where milk would go, separate from the factory and it would be bottled and taken to the houses. Today it’s all made out of Fonterra. I don’t really know about modern milk and how it goes through a big factory.”

“When I was a kid we had milk straight from the cow shed. It didn’t come from the vat, it came from the cow. The milk now is just water, there is a huge difference.”

“I actively chose to consume some dairy products and avoid others. Butter over margarine, but I buy almond milk”

“I would like to see a lot of the people out there who don’t agree with dairy stop consuming and reaping the benefits of it. I would like there to be more information available from a nonbiased perspective to educate people. People in town probably believe rural communities consume meat and dairy in whole different ways to what they do. Those who complain about the rising prices of meat and dairy would not go into the country to see how it is produced, and if they did they would be more mindful of their consumption.”

## Quotations from Those Who Support the Dairy Industry – On Dairy Farmers

“I actually don’t like farmers as a whole; I think they’re real Bogan. That’s not just dairy farmers, that’s just farmers. I just hate country people. I don’t know why. The way they talk, different breed. They’re more crude, say things that other people wouldn’t say. Often they’re quite dirty, they smell which is no-ones fault. I just don’t like some farmers attitudes, I think I’m a bit of a lady and it’s hard to describe. I think it’s case by case but just as a general, I don’t like them;”

“I think most dairy farmers would be environmentally conscious because that is their life sources and income so they don’t want to \*\*\* the land that they are trying to work. Generally they are caring people and curious but perhaps undereducated in the standard sense. They will tell you all about different types of grass but don’t know the difference between a policy and a prod. They are reclusive and harder to reach – emotionally and mentally. They probably are better at enjoying “the simple things in life” and probably focus less on materialistic things. I feel like a farmer would more appreciate a cup of tea with them than if you brought them a great painting, they appreciate the company. And they are frugal, they don’t like to spend their money, but they have these massive machines worth thousands of dollars.”

“They play their own tiny violins, every job every industry comes with its own difficulties, but farmers seem to feel like the world is out to get them, they seem to think that everything is put in place to be out to siphon their income. You’d have to be very passionate to be able to cop all the bullshit, put up with everything. Not educated by societies standard but intelligent in their own way. I feel like people in that industry have a different mind, someone who might not be able to pass a standard school test but could create a whole farm plan.”

“A breed of their own. Hardworking. I think the majority would be. Hopefully most of them would be knowledgeable. I understand that there are some of them that shouldn’t be farming. They’re kind of a silent breed really. Because they’re on their own a lot, I don’t know if they want to be left alone or if they’re kind of like hermits. Because of the distance between them and their neighbours it’s usually just their own family dynamics. In saying that, they still have to get to know their neighbours in case there is an emergency of some

sort. But still, a breed of their own. As long as farmers can get what they need for the farm, they have as little to do with town as they can. It's more of a trading relationship, they're worlds apart now."

"Lovely, but smelly. Better hygiene would be good. Hard working people."

### What Is It That You Do Support About the Dairy Industry?

This question was asked at the end of the interview, to return back to the original question about whether the respondent supported the dairy industry. It was asked as, *"So earlier in the interview, you stated that you support the dairy industry. We have now discussed a number of areas that you don't completely agree with. Could you please share why you answered that first question the way that you did?"*

"I support the fact that it creates jobs for people, so many jobs. If you took away dairy you would take away so many jobs and there are so many people that would be very displaced. It's like the American slaves. When slavery was being abolished the issue was raised that if you removed the slaves overnight there were landowners who didn't know how to farm their land and slavery had to be eased out. It's the same with dairy."

"I've always had the impression that dairy is good for jobs and income for NZ and that's about the extent of it."

"I think that it's a good industry, it has a lot of work, food source, it's important for our countries economy, it's quite a big percentage contributor to our GDT, it's good for our export market."

"The jobs that it creates. It gives us something to consume. Going back to the environmental impact, I can't imagine that soy would be that much better. I'm sure people wouldn't be so quick to just chug a litre of milk if they knew the impact of that litre."

"It's an integral part of our economy. I support farmers supporting our country."

## What Does Support Look Like?

From the answers the respondents gave during these interviews we can note several key points:

- Supporting the dairy industry does not mean that I am connected to the industry at all myself or through family
- Supporting the dairy industry does not mean that I visit rural New Zealand
- Supporting the dairy industry does not mean that I am aware of all of the practises carried out on farm
- Supporting the dairy industry does not mean that I am a consumer of dairy products
- Supporting the dairy industry does not mean that I agree with all of the practises carried out on farm, and some I may actively oppose
- Supporting the dairy industry does not mean that I like dairy farmers as people

The leads to the question we must ask – as an industry and as dairy farmers – what are we hoping for support to look like? Is it enough to have a person state that, yes, we do support dairy farming. Is our aim to see milk promoted as a nutrient dense food source in a nation where childhood poverty has such a stronghold? Is it our aim to see milk consumption per capita increase not only to the levels we saw ten years ago but to even beyond that? Investment of money can be seen as a show of faith in our product, without sales, it is questionable whether we can really say that we have the consumers' full support. If we are not looking to the public as a consumer then we are looking to them as a stakeholder and not only is that enough for the production of a food source but do we also have an appropriate longterm engagement strategy with that stakeholder.

Are we looking to:	For the Purpose Of:	Achievable Through:
Educate		Engagement
Sell Product		Commercial Marketing
Maintain Social Licence		Social Marketing

The *For the Purpose Of* column in the table above has been deliberately left blank and is for the reader to contemplate. Why do we want to achieve these outcomes?

If, for example, we would like to maintain our social licence so that we can continue farming as we always have we may need to examine our motives.

If, as another example, farmers would like to receive less flack from the New Zealand urban public then their product must be perceived as having an appropriate cost-benefit.

If we choose to Educate the public then we must be aware that those who already are educated and understand our practises do not always agree with them or do so with reservation with the greater good of the economy in mind. It could be that offered an economically viable replacement industry, such as manufacturing, the New Zealand public may support dairy farming less. Bobby calves, early separation of cow from calf, are unpalatable. If we are looking to sell the Dairy Farming lifestyle, the majority of those interviewed already know that the hours are not sustainable in their own lives, no matter the house or salary. If the public perceives that animals' are degrading our natural environment then it is no longer beneficial to tell stories of effective pasture utilisation, we need to step back and discuss why we utilise animals in the first place which again returns us to the unparalleled value of the product.

## Recommendations

- Industry must discuss and determine appropriate engagement methods between the public and the dairy farmer, with a view to understanding shared and opposing values as a baseline for moving the industry forward.
- Research is required to understand the relationship between the New Zealand citizen as a consumer and as a stakeholder in the land and the extent to which one influences the other.
- Further research is required to determine perceived barriers to change from dairy farmers in areas where values between the public and the farmer align.
- I recommend research into the sales figures for dairy per capita over the last twenty years, as this would incorporate a number of generations, and review of that data to determine if there is opportunity for higher profit and sales domestically.
- Prioritise discussions with leading supermarket chains with regard to the justification for placement of product in the “Health Food” chillers and what requirements would need to be fulfilled in order to be included in this section. The answer to this question could potentially hold a lot of the answers as to public perception of dairy. However, if this is solely nutrient based there is research which proves dairy should be marketed in that section.
- Challenge the use of the terminology being used by competing products, including “cruelty-free” and the use of the word “milk” for plant-based alternatives.

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