

Better Futures 2022



KANTAR

**Sustainable
Business Council** 

 wbcsd Global Network Partner

Better Futures

13 years
monitoring
the issues
New Zealanders
care most
deeply about

n=1517*
New Zealanders

Nationally representative
(age, gender, region)

Online survey

Fieldwork dates:
December 2021

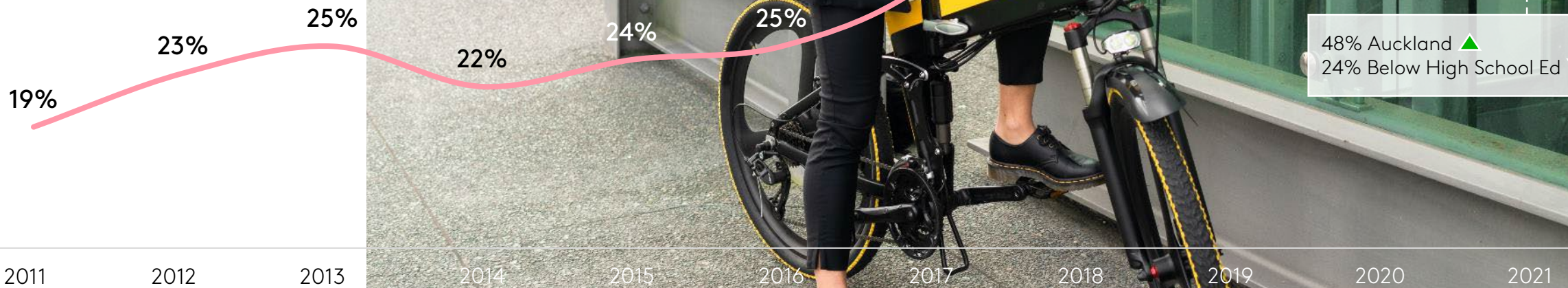


1. The current NZ landscape



New Zealanders' personal commitment to living sustainably continues an upward trend

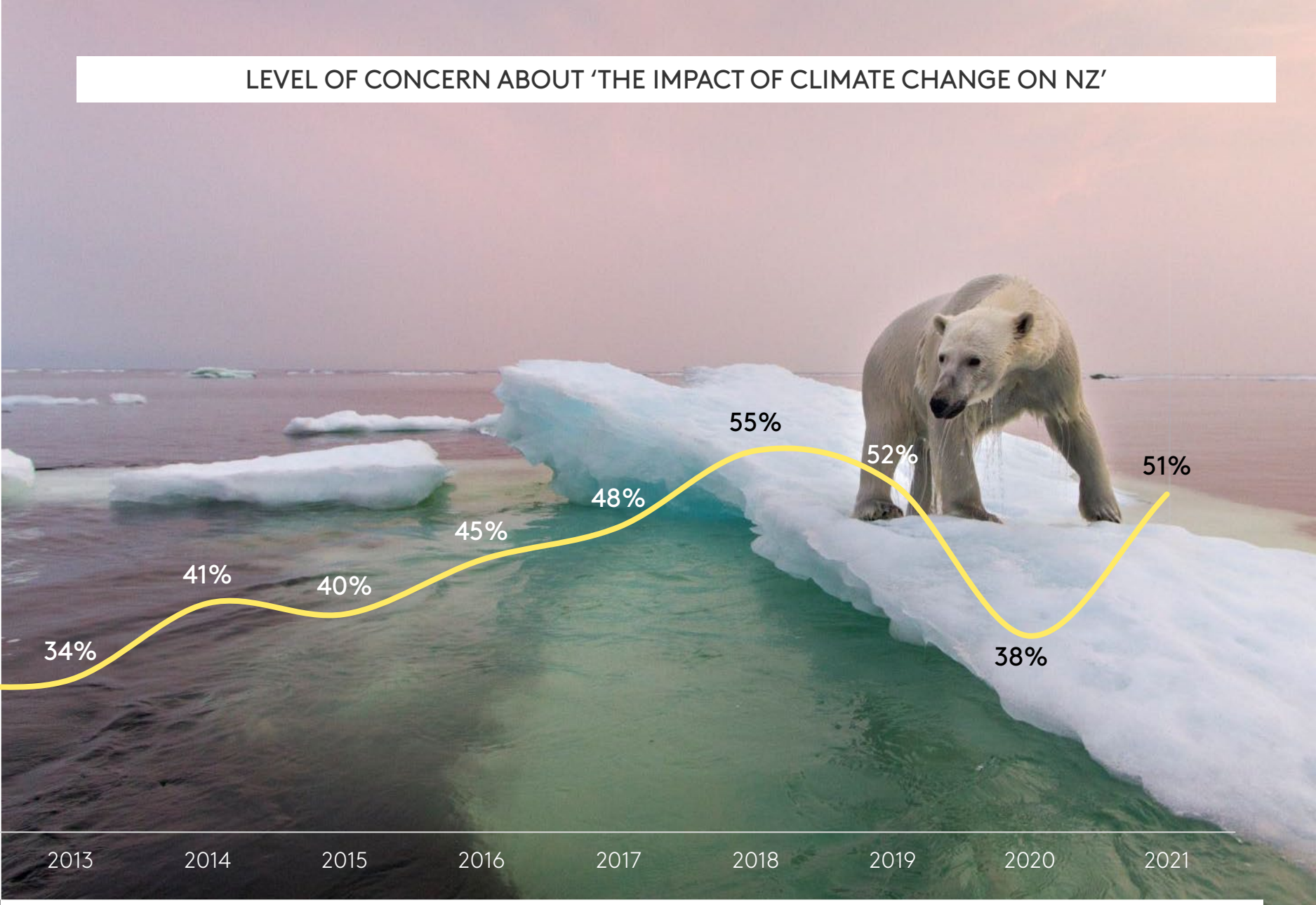
LEVEL OF COMMITMENT TO LIVING A SUSTAINABLE LIFESTYLE



Q: Where would you place yourself on our scale in terms of how committed you are to living a sustainable lifestyle? (Top 3 box, ranked self 8-10/10) Base: n=1016

Concern about the impact of climate change on NZ has also rebounded after the initial shock of the pandemic

LEVEL OF CONCERN ABOUT 'THE IMPACT OF CLIMATE CHANGE ON NZ'



Similarly,
more of us now
appreciate the
immediacy of
the problem

45%

Reckon climate
change problems
are so far in the future

▼ - 5% points from 2020

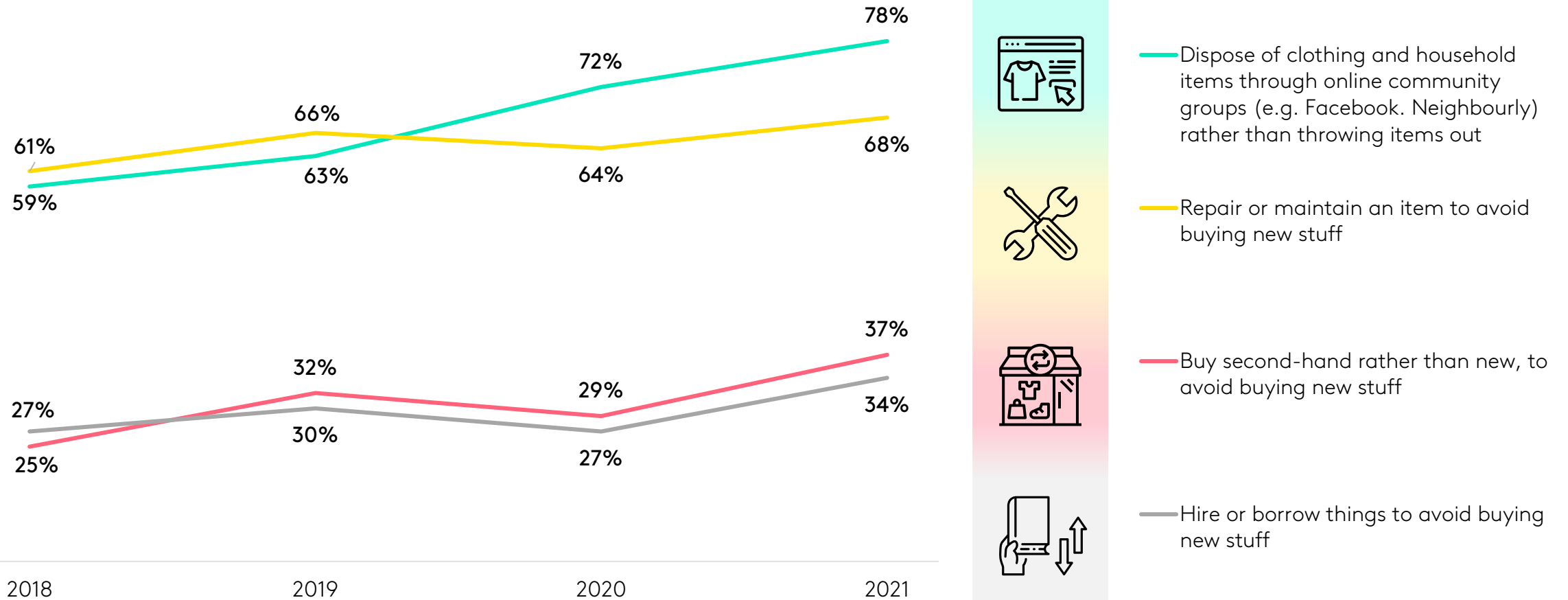
There are encouraging signs that some sustainable behaviours are becoming socially normative and habitual in NZ



...some behaviours are starting to stick!

In NZ, more people are claiming to undertake circular shopping behaviour

YEAR ON YEAR CHANGE IN BEHAVIOUR





“One of the things that I’d like to be doing but I’m not doing is we have a local shop where you can go and fill your containers, and that’s a really gratifying thing to do.”

Female, 25-34, North Island
(excl. Auckland and Wellington)



“

“Recently it made me very aware of what is going on out there. For me I try to recycle, upcycle, reuse, fix rather than throwing things away or thinking I’m always going to find a better option.”

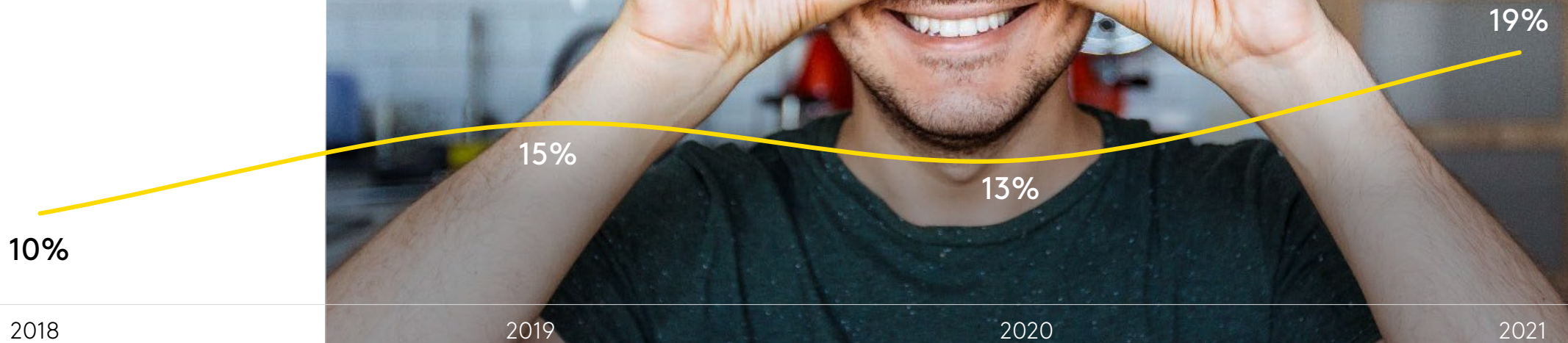
Female, 35-44, North Island
(excl. Auckland and Wellington)



A 'flexitarian' approach to food is on the increase with more people choosing plant-based options

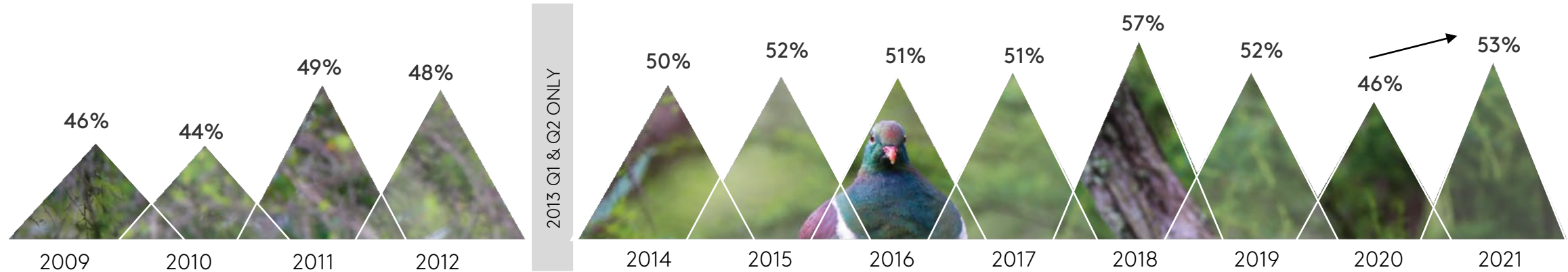
YEAR ON YEAR CHANGE IN BEHAVIOUR

— Maintain a plant-based vegetarian diet (no meat or fish) or vegan diet (no animal products)



For New Zealanders, the pandemic has also encouraged us to reconnect with nature and appreciate the importance of protecting the flora and fauna in our backyard.

PROTECTION OF ANIMALS AND PLANTS THAT ARE NATIVE TO NEW ZEALAND



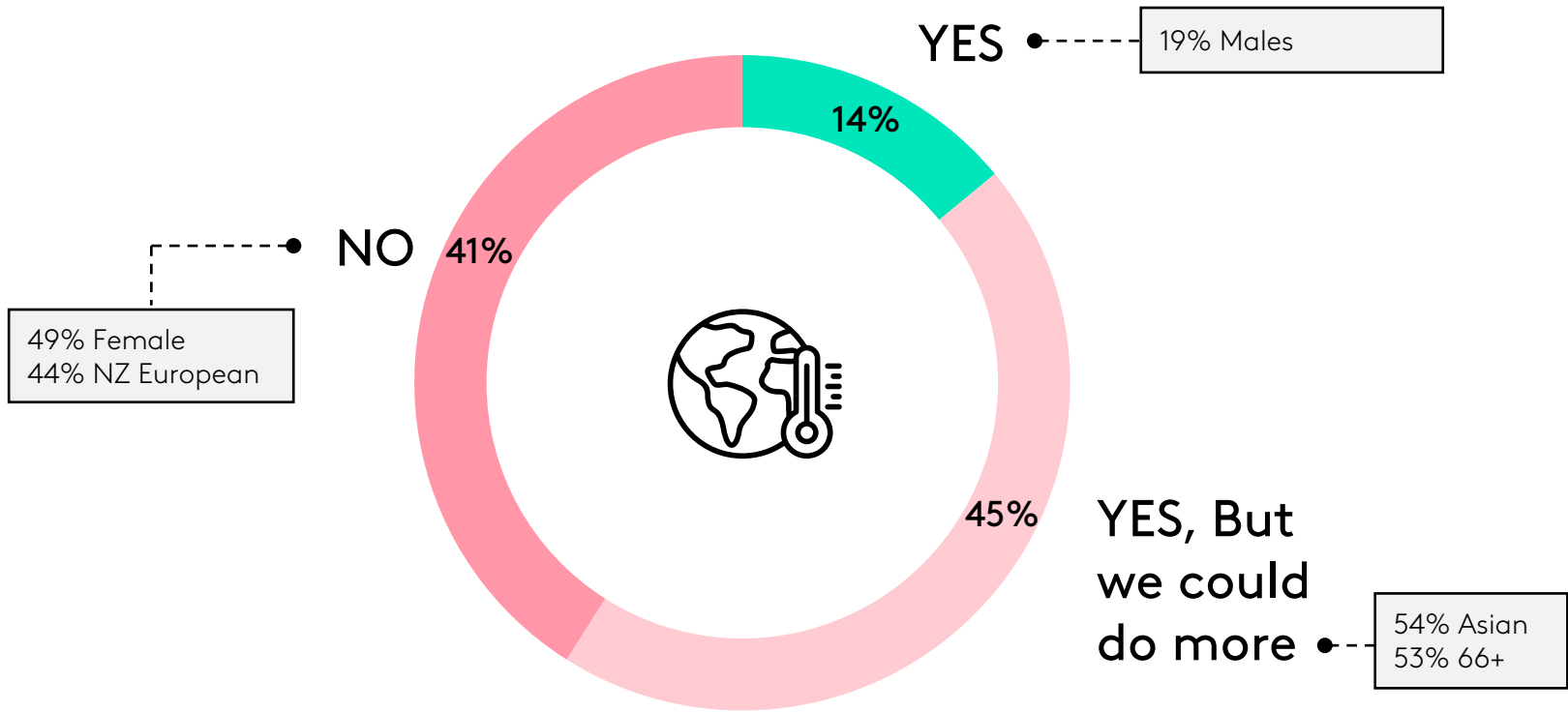
LOSS OF BIODIVERSITY



However, there is a clear call for more to be done to change lifestyles to avoid the increase in global temperature of more than 1.5 deg C



DO YOU FEEL NZ HOUSEHOLDS ARE DOING ENOUGH TO MEET THIS TARGET?



86% think we could do more



Current scientific research suggests that humans need to change their lifestyles to avoid an increase in global temperature of more than 1.5 degrees celsius. Do you feel NZ households are doing enough to meet this target?
Base: n=1016

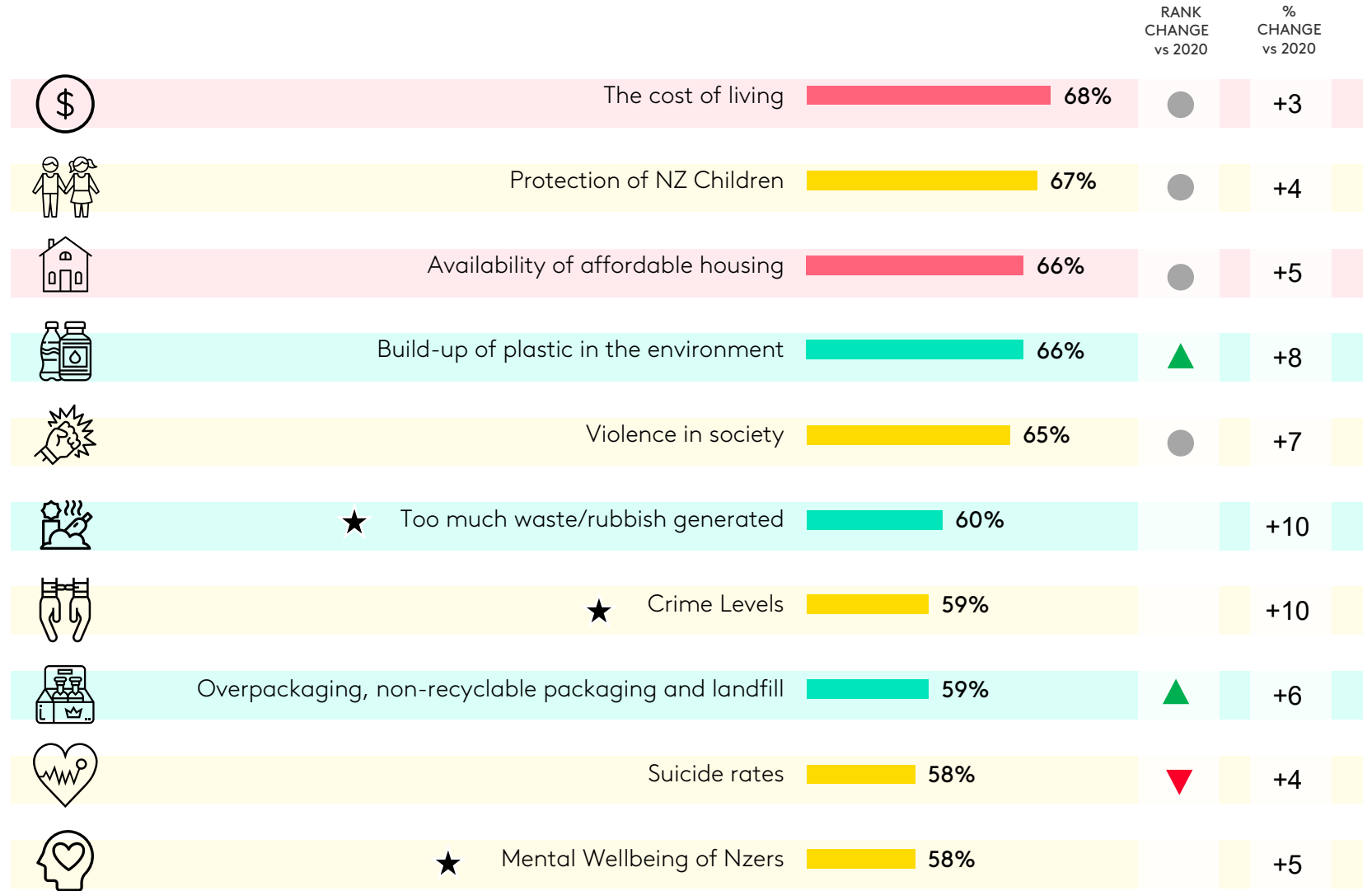
This is a challenge when top concerns to New Zealanders are not explicitly related to environmental sustainability.

In 2021, five of the top 10 concerns are social/wellbeing related and economic concerns have intensified.

- Economic
- Social sustainability
- Environmental

- Same position
- Moved up
- Moved down
- New Top 10 entrant

TOP 10 CONCERNS

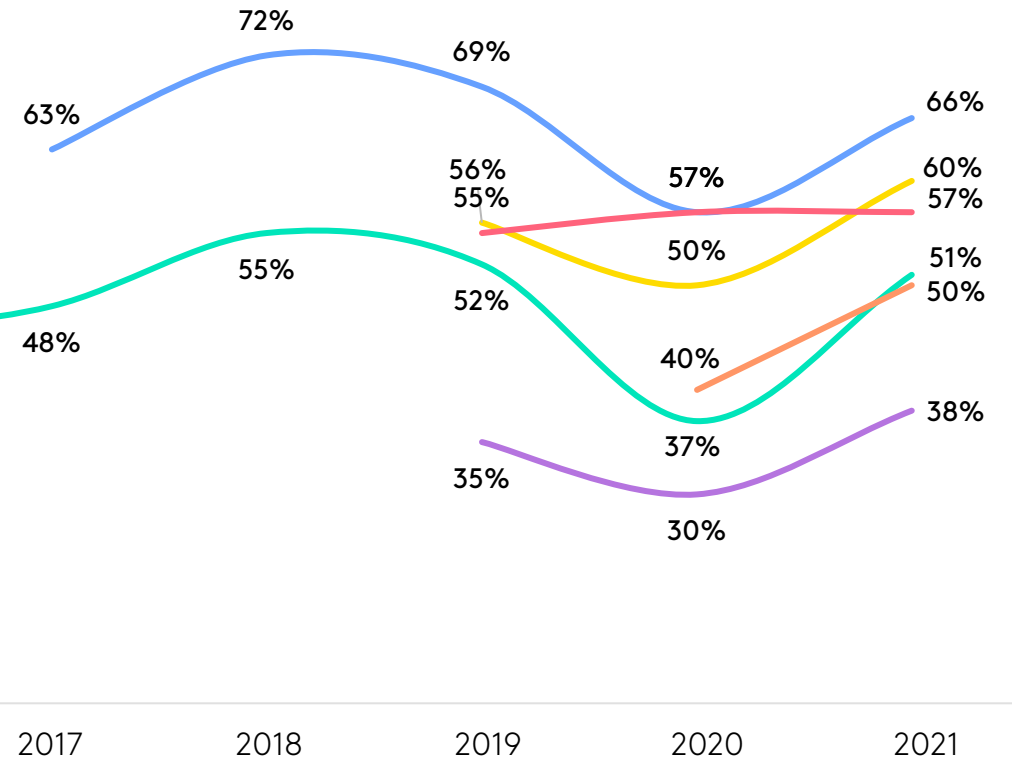


And even within a cluster of environmental concerns, it is the **visible and ownable** environmental issues of plastic, waste & recycling that remain of greater concern to New Zealanders



2011 2012 2013 2014 2015 2016

- Build-up of plastic in the environment
- Too much waste / rubbish generated
- Not enough waste is recycled
- The impact of climate change on New Zealand
- Overconsumption and waste (food, clothes, etc.)
- Too many carbon emissions (e.g. Pollution from farming, vehicles)

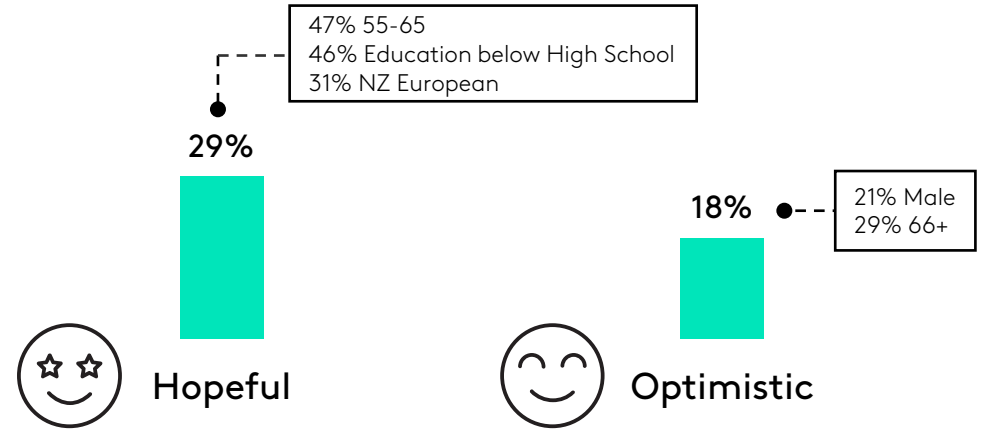
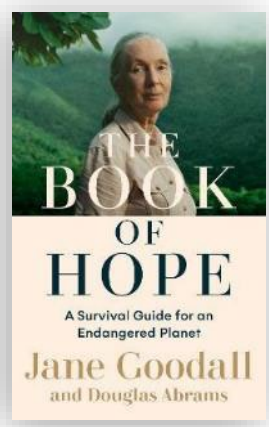
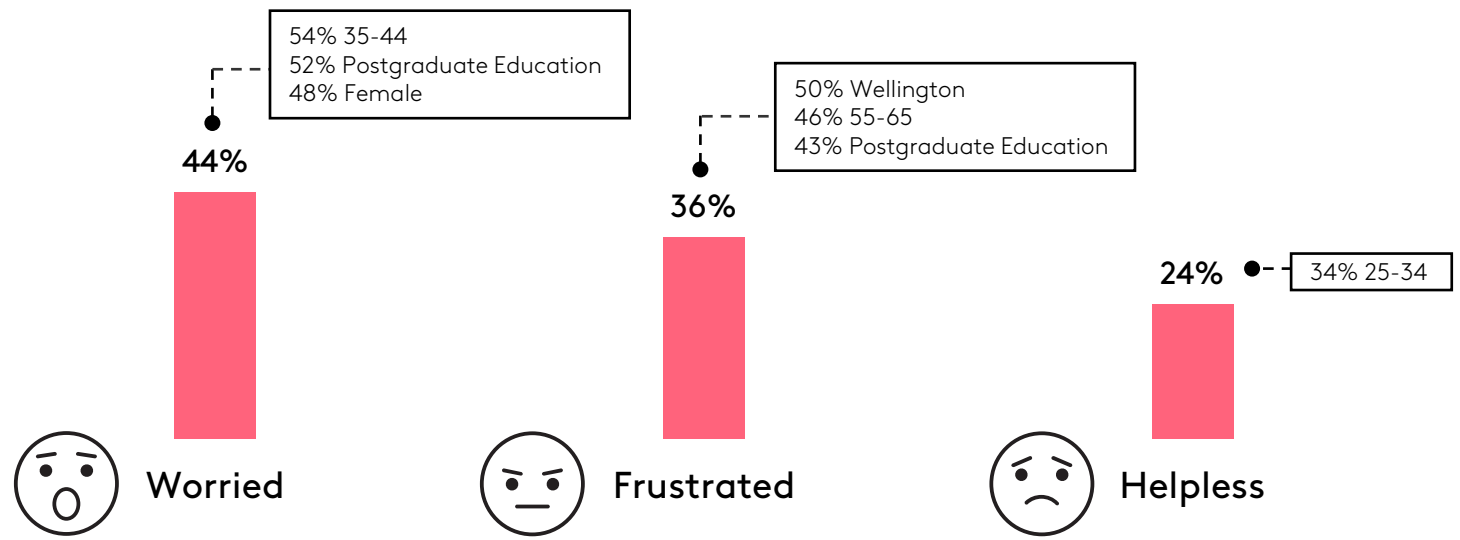


Navigating multiple priorities when thinking about the enormous issue of climate change inevitably produces a range of conflicting emotions

Different groups feel different emotions



FEELINGS TOWARDS CLIMATE CHANGE

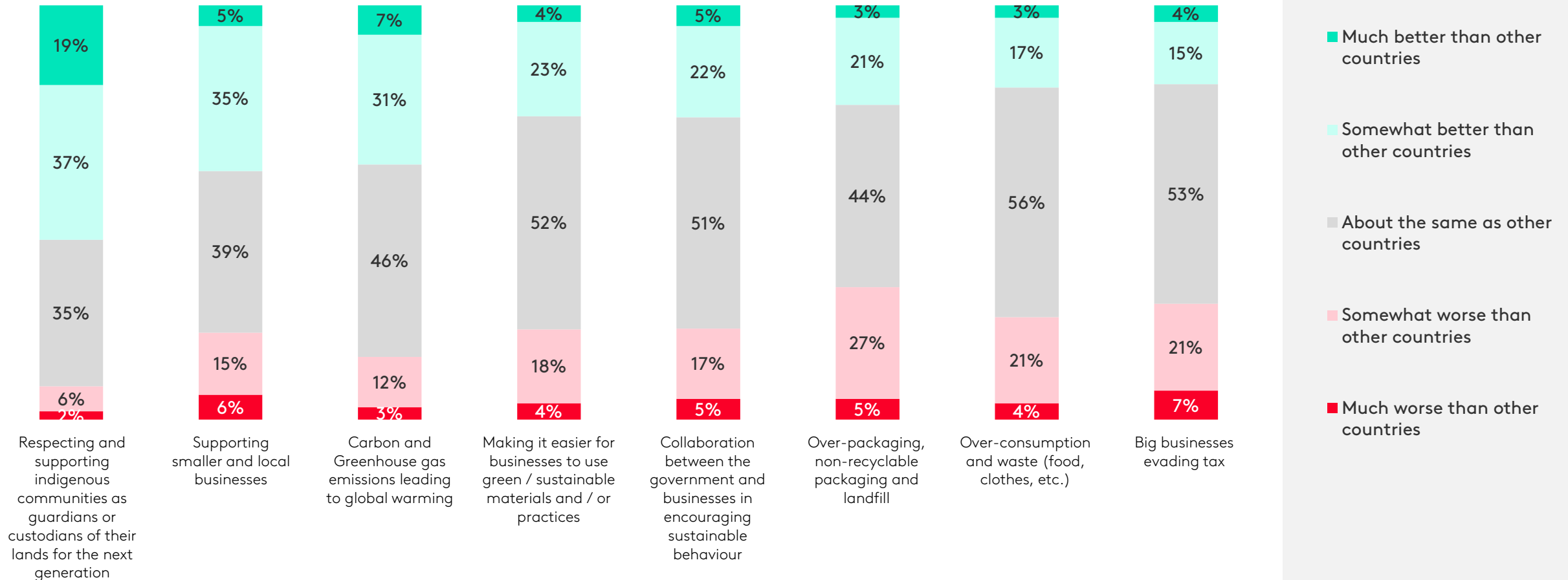


Q. Which 3 words from the list below best describe how you feel about Climate Change?
Base: n=1016

An aerial photograph of an industrial facility, likely a power plant or refinery, during a dramatic sunset. The sky is filled with large, billowing clouds of white and grey smoke, illuminated from below by the setting sun, creating a warm orange and pink glow. In the foreground, several tall, dark smokestacks are visible, each emitting a thick plume of white smoke that rises into the air. The industrial buildings have large, corrugated metal roofs. In the background, a range of low mountains stretches across the horizon under the colorful sky. The overall scene conveys a sense of industrial activity and environmental impact.

1 Understanding barriers

Despite 86% of New Zealanders thinking we could do more towards meeting the 1.5 degree target, we think we're doing relatively well compared to other countries on a number of sustainability issues

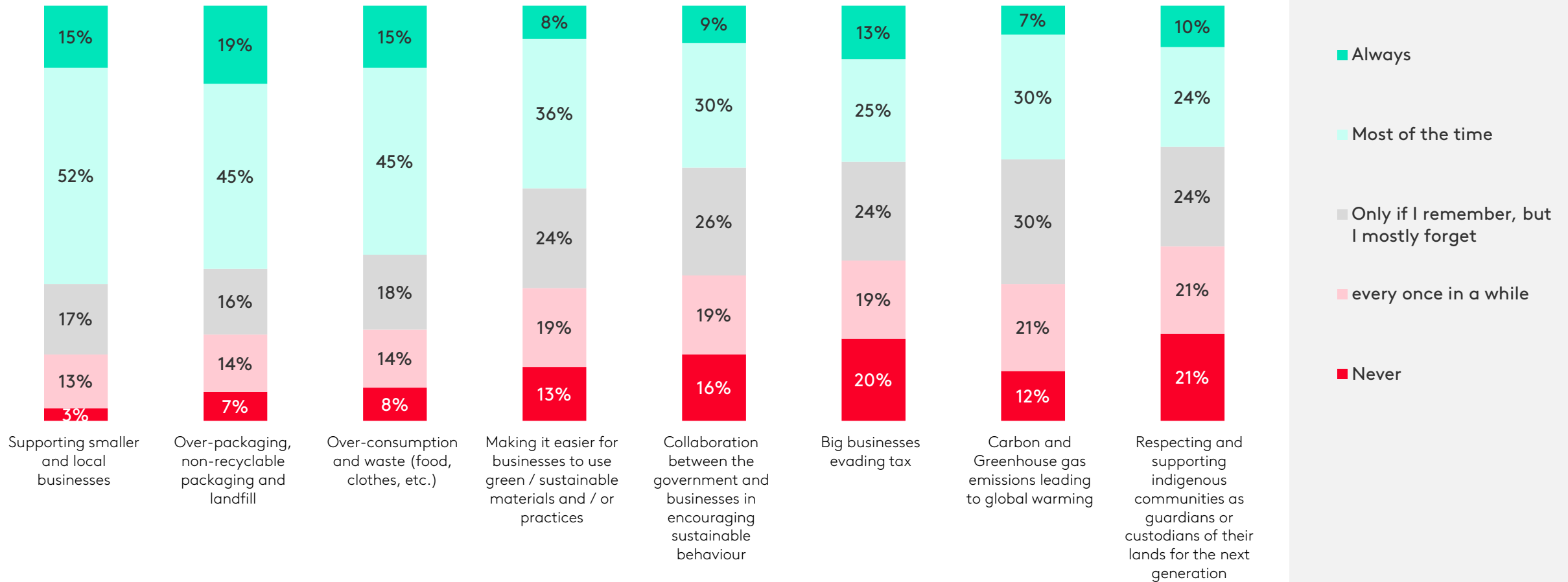
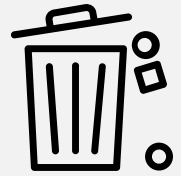




“My priorities have changed quite a bit even pre-COVID 19. I’ve been thinking a lot about how we’re such big consumers, ...I think that we are damaging the planet by using things like fossil fuels and I do think that we need to move away from that.”

Female, 45-54, North Island
(excl. Auckland and Wellington)

Also, many of us tend to limit our behaviour to those issues where we feel most empowered to make a difference i.e. waste, overconsumption and supporting local businesses.



New Zealanders hold a strong belief that it is the government rather than individuals should lead the way

Companies

▼ -2

22%

50%

Government

▲ +4

Individuals

▼ -1

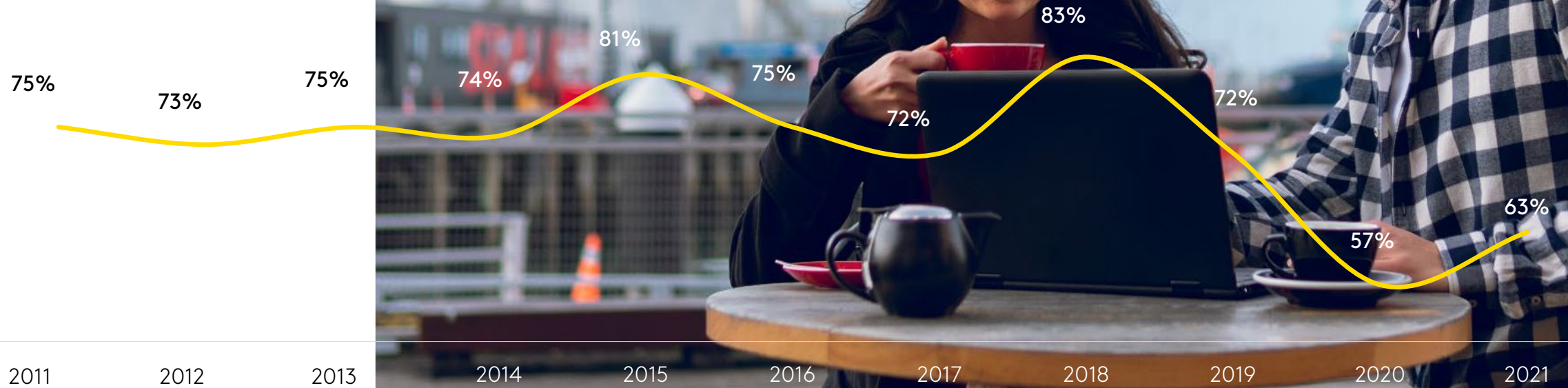
20%

Note: Don't Know = 8%



Lack of messaging clarity from businesses continues to have a material impact upon inaction

CONFUSION LEVELS



There are also practical or systemic barriers to doing the 'right thing'



“The complexity of New Zealand’s recycling system is a key barrier, as there is little uniformity across the 67 local councils dealing with waste and recycling.”

[KANTAR PUBLIC Journal 04 \(turtl.co\)](#)



Finally, there is a range of more everyday, practical barriers for those who have good intentions. In 2021 'Effort' has entered our shared experience as a barrier to sustainable behaviours

BARRIERS



COST

prioritise saving money over saving the planet

71%



EFFORT

better choices require more effort

63%



CONVENIENCE

can't be bothered to try the sustainable alternative

57%



COMFORT

don't want to take the risk of trying something new (or less efficacious)

50%



KNOWLEDGE

don't have enough information about how ethical/sustainable different products are

44%

We know that not all consumers are on the same sustainable journey but we can clearly see the impact of COVID on Believers

32% ▲ +3%

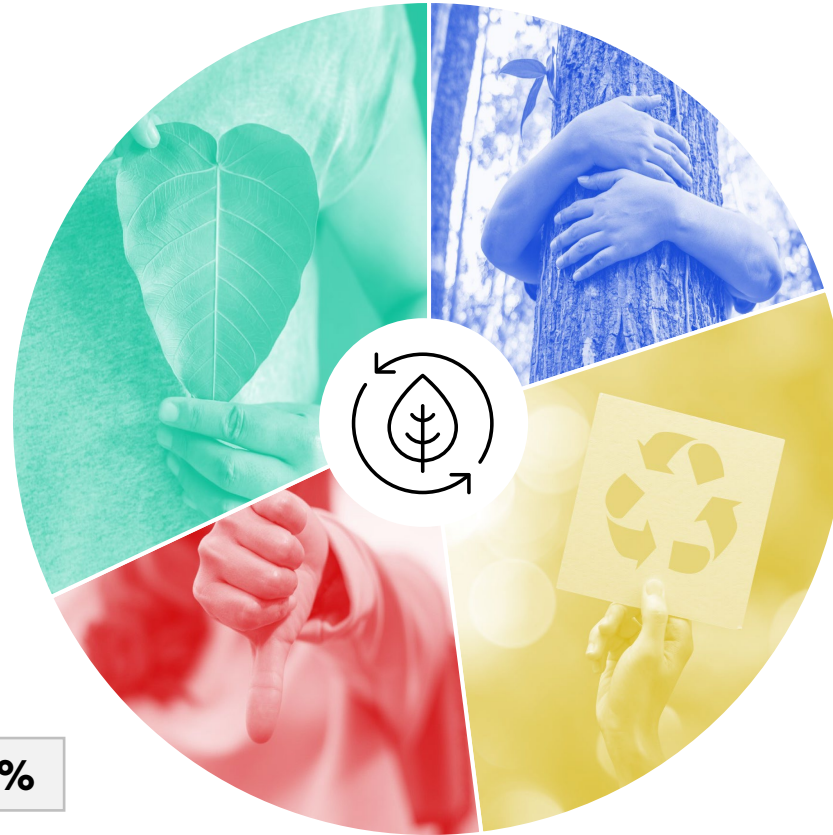
Actives

I believe & do

20% ▼ -8%

Believers

I believe but I don't do as much



20% ▲ +2%

Dismissers

I don't really care

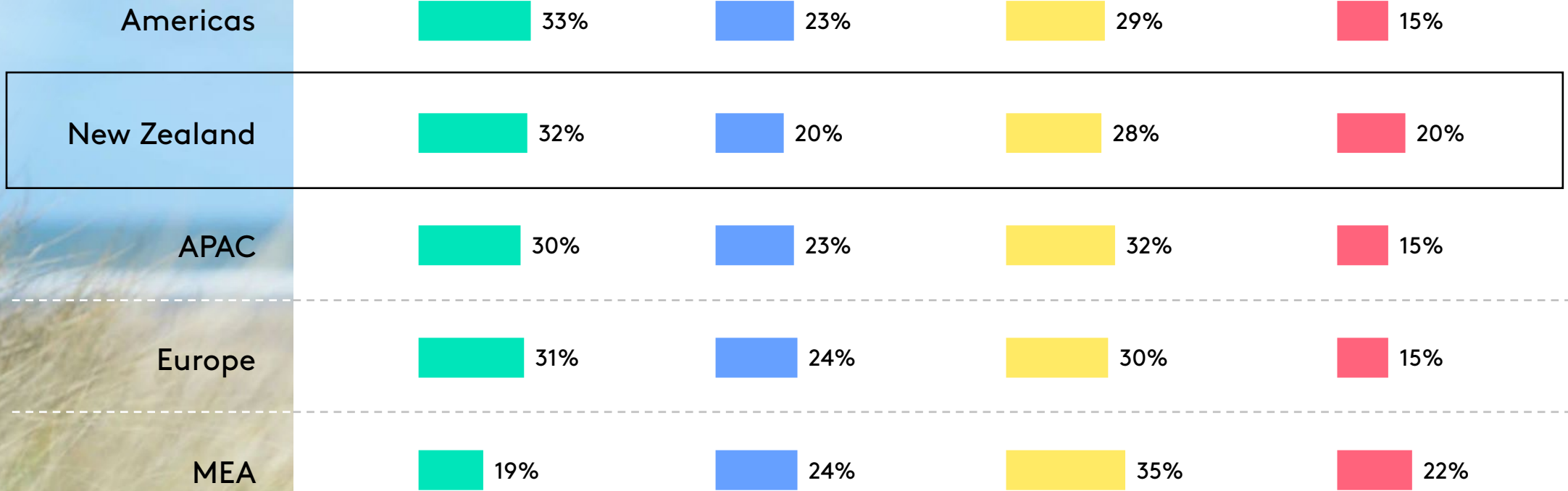
28% ▲ +3%

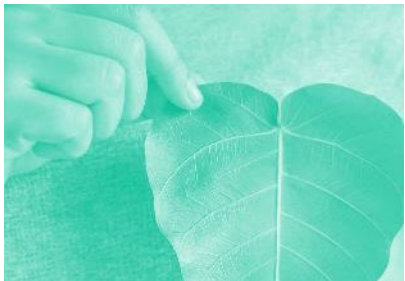
Considerers

I believe but I only do a little

Compared to the rest of the world segment sizes are very similar in all regions bar MEA highlighting a difference of priorities

SUSTAINABILITY SEGMENTS





'Actives' showed increased levels of private car usage and less reliance upon sustainability certification or consideration of energy use as a result of the pandemic

LESS LIKELY TO



-16% ▼

Use your own car, rather than thinking about using a car share scheme or renting



-9% ▼

Buy brand new things, rather than bothering with second hand



-8% ▼

Stick with your current electricity supplier, rather than switching to green energy (e.g. Solar, wind etc.)

MORE LIKELY TO



10% ▲

Drive somewhere by car, rather than walking or bothering with public transport



9% ▲

Buy something without checking if it's Fairtrade



10% ▲

Buy products that are not certified sustainably sourced (e.g. Fish, wood, palm oil etc.)



10% ▲

Keep the heating/lights on and not really think about home energy use



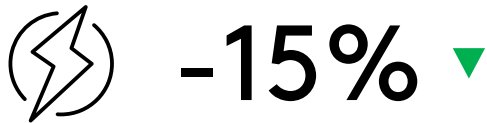
9% ▲

Buy new clothes to wear to one occasion/event

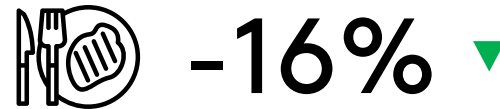


'Believers' are currently less likely to invest the time & effort associated with everyday sustainable shopping habits, but COVID has allowed them time to experiment with dietary options and energy suppliers

LESS LIKELY TO



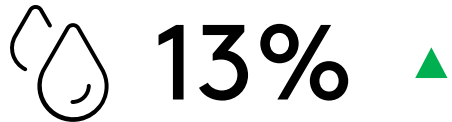
Stick with your current electricity supplier, rather than switching to green energy (e.g. Solar, wind etc.)



Stick to the diet you know, rather than trying the vegetarian or vegan option



MORE LIKELY TO



Buy products without checking whether they're water intensive (cotton, avocados, beer etc.)



Buy packaged products, rather than bothering with bringing you own refill containers to the shop



Buy something without checking if it's locally produced

3.

So what does this
mean for brands?



People are seeking leadership from brands and businesses

66%

Of people across 20 markets believe it is important for brands to be “committed to making our society better”

Kantar, Global Monitor 2021

74%

Of people warn that companies placing profits before people will lose their trust forever

Edelman Trust Barometer

87%

Of people would like to be informed of companies efforts to address the environmental situation

Forbes

Closer to home, spontaneous mentions of NZ brands leading in some form of sustainability has improved



Sustainability Leadership Measurement

Although brands with a clear sustainable message will continue to win, others need to work harder to prove their credentials

75%+ AGREE



Brand free zone



FISHER & PAYKEL



50 - 64% AGREE

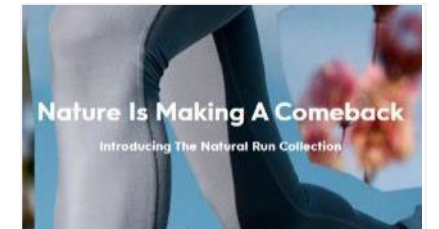
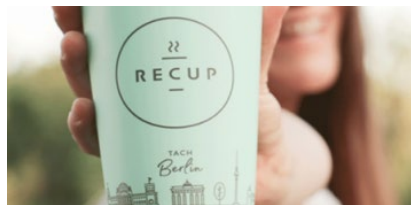


“When it comes to buying things from the supermarket, there’s not often a lot of choices that show you all the ‘behind the scenes’...

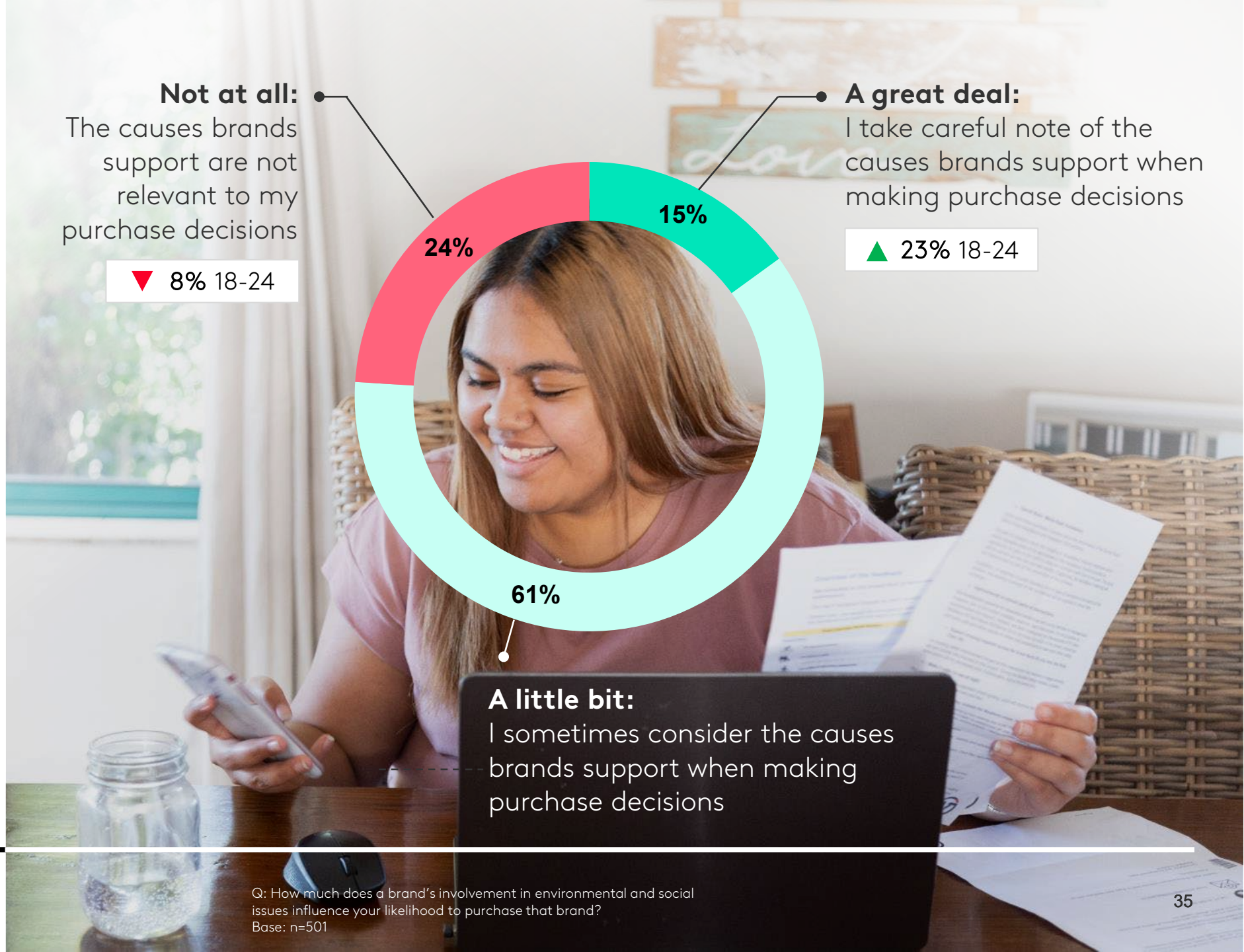
I find it really hard to make choices in my everyday shopping to get something that is sustainable.”

Female, 30-39 years, Waikato

A number of international brands have managed to successfully factor sustainability in their strategy...there is plenty to learn from these



Young people in particular have strong views on the role of brands when they make decisions...



4. Summing up



Key takeouts

Snapshot of NZ

With social, wellbeing and economic sustainability concerns intensifying amongst NZers - living more sustainably (particularly within financial means) will be a big driver of choice.

However, concern for climate change has rebounded and NZers desire more action towards the climate goal.

Companies need to identify social, economic and environmental issues that are relevant and meaningful to their sector at this point in time and to empower consumers to take action where they can.



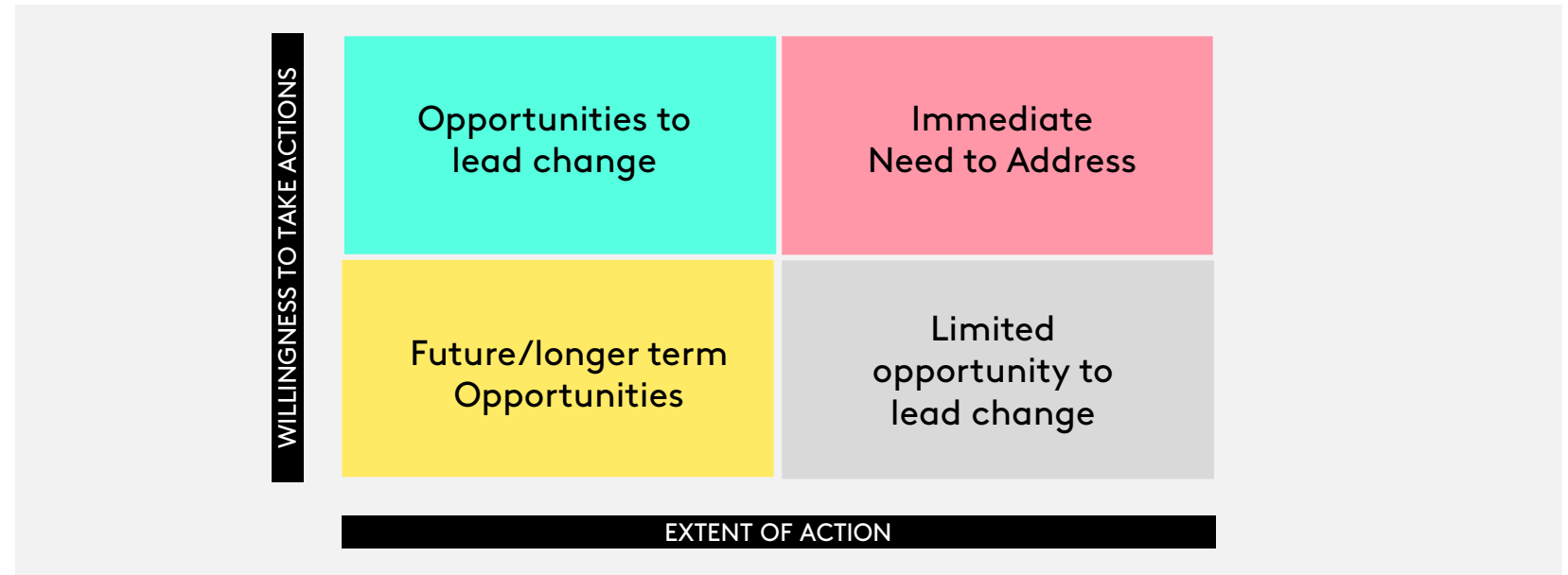
Key takeouts

Closing the “Say Do” gap

The UN has defined closing the value-action gap as the goal in overcoming barriers to sustainable consumption

With 8 in 10 New Zealanders showing belief in the need to live more sustainably, there are significant opportunities for NZ businesses to solving consumers’ tensions and making it easier for them to choose your brand.

Affordability and Effort (exacerbated due to Covid factors) are currently the major barriers to consumers making more sustainable choices. Addressing barriers is worth it – as seen in some long-term behavioural shifts



Key takeouts

The role of brands in communicating powerful sustainable messages

NZers expect business and brands to lead on sustainability – but they are also sceptical (particularly GenZ).

NZ brands leading in sustainability are advantaged by having it in their DNA. Other NZ brands are starting to get traction with their sustainable messages.

It is possible ‘to reach’ the people who are disengaged by the topic, but also it is possible to not engage with those people who are, if the messaging isn’t right.

Successful communication is a balancing act between guilt, hope and inspiring action.



New Zealand has its own unique sustainability challenges, but we are following the same trajectory as the rest of the world.


For businesses with international interests, it's worth understanding the nuances of different markets – available through Kantar Sustainability Sector Index Reports for individual markets.

KANTAR

Global Sustainability Sector Index

Exploring what sustainability means to consumers and how brands can navigate their journey

GUIDELINES FOR CLIENT SERVICING TEAMS



Get access to **Global Sustainability Sector Index** insight from all over the world



35
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