

Better Futures 2023

KANTAR

Sustainable
Business Council 
 wbcsd Global Network Partner



Better Futures 2023



14 years
monitoring
the issues
New Zealanders
care most
deeply about

Methodology Details

MAIN SAMPLE

Fieldwork dates:
2nd Feb – 19th Feb

Sample Size:

1000

BOOST SAMPLE

Streamlined
Questionnaire

Fieldwork dates:
17th Feb – 2nd March

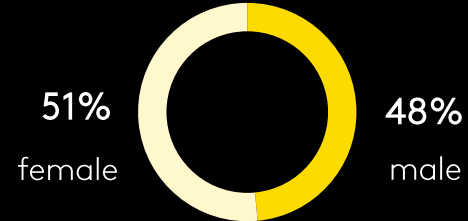
Sample Size:

300

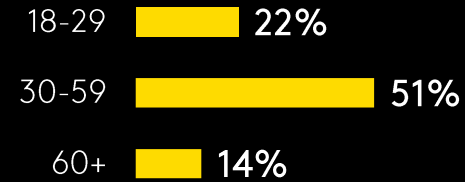
KANTAR

Nationally Representative

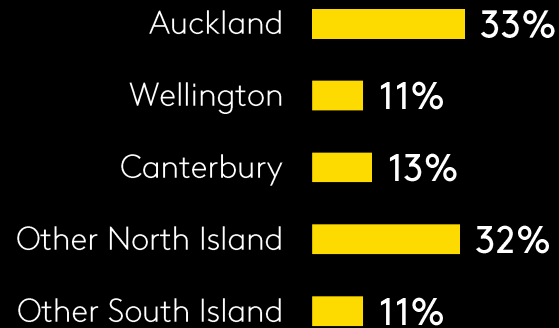
Gender



Age



Region



About Kantar Neighbourhoods

To better understand New Zealanders
by time, place and location in order
to optimise our clients'
communications and engagement...

... we've created a geodemographic
tool called **Kantar Neighbourhoods**
which enables brands to explore,
understand, and pinpoint
their target segments.

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KANTAR NEIGHBOURHOODS



1

Sustainability commitment and the cost of living

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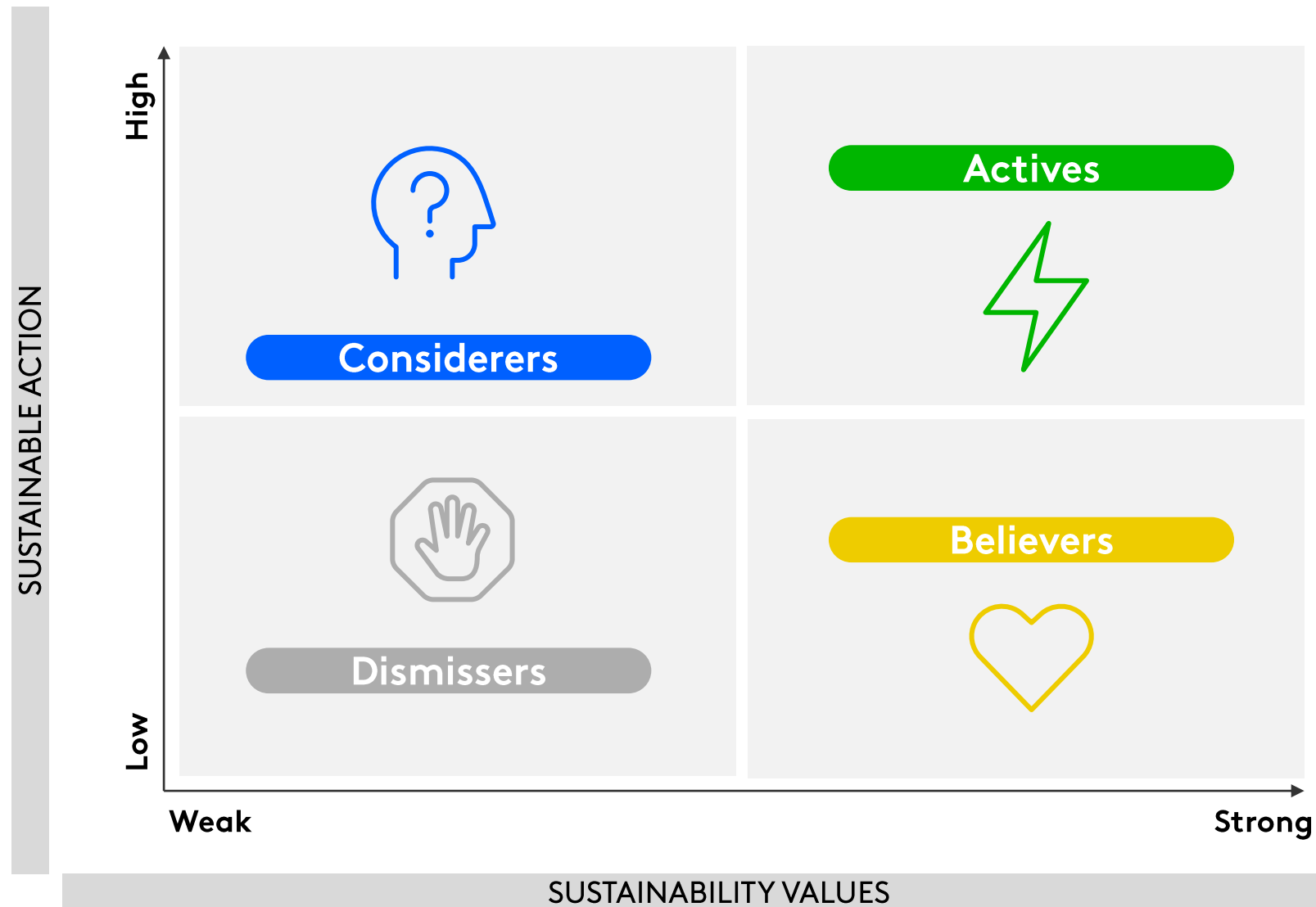
I feel guilty that I'm not engaged but my prime focus is my family, and working within our budget takes priority over sustainability and the things I should be doing to help improve the planet.

Believer, 35-44 years old

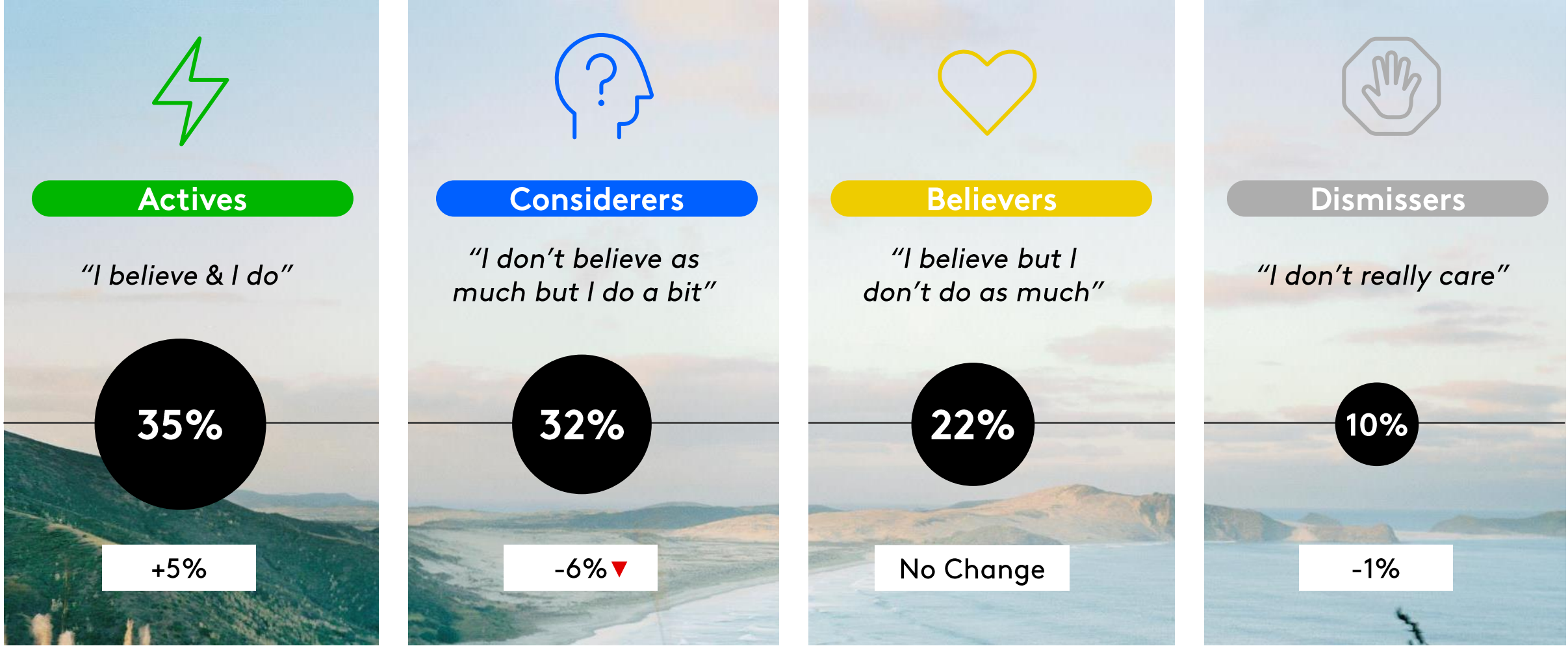


We can understand the four sustainability segments in New Zealand via a combination of their values and their actions

Kantar Sustainability Consumer Segmentation



The last 12 months has seen a notable increase in sustainability activism





These **Eco-Actives** remain a key consumer group as they are significantly more likely to have undertaken a range of sustainable & ethical behaviours...



Recycle paper, plastics, glass, and tins



Give away clothing and household items rather than throwing items out



Choose home appliances based on energy star ratings



Buy products that use no animal testing / respect animal welfare

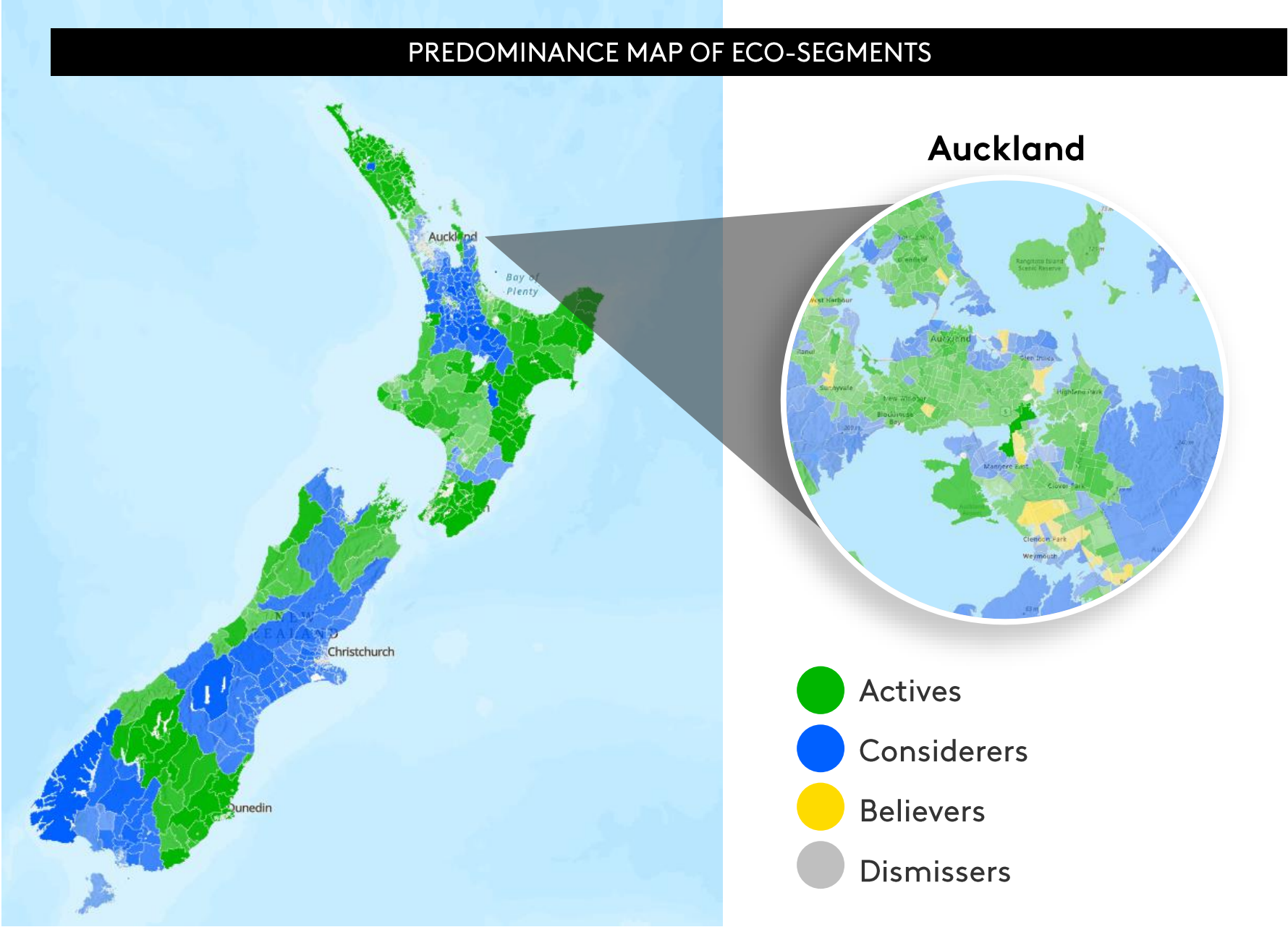


Reduce the amount of meat you eat



Reduce your energy use at home

We can see that the regions of NZ where we are most likely to find Eco-Actives are skew away from the main population centres of Auckland and Christchurch



Behind this change
however, intent is
driving change
notably more
than behaviour

I am prepared to invest my time and money to
support companies that try to do good



I feel that I can make a difference
to the world around me through the
choices I make and the actions I take



Buying sustainable products or choosing
environmentally and socially conscious services
shows others who I am and what I believe in



I have stopped buying certain
products/services because of their
impact on the environment or society



I actively seek out companies and
brands that offer ways to offset
their impact on the environment



Similarly, concern about the impact of climate change on NZ has also maintained it's rebound after the initial shock of the pandemic

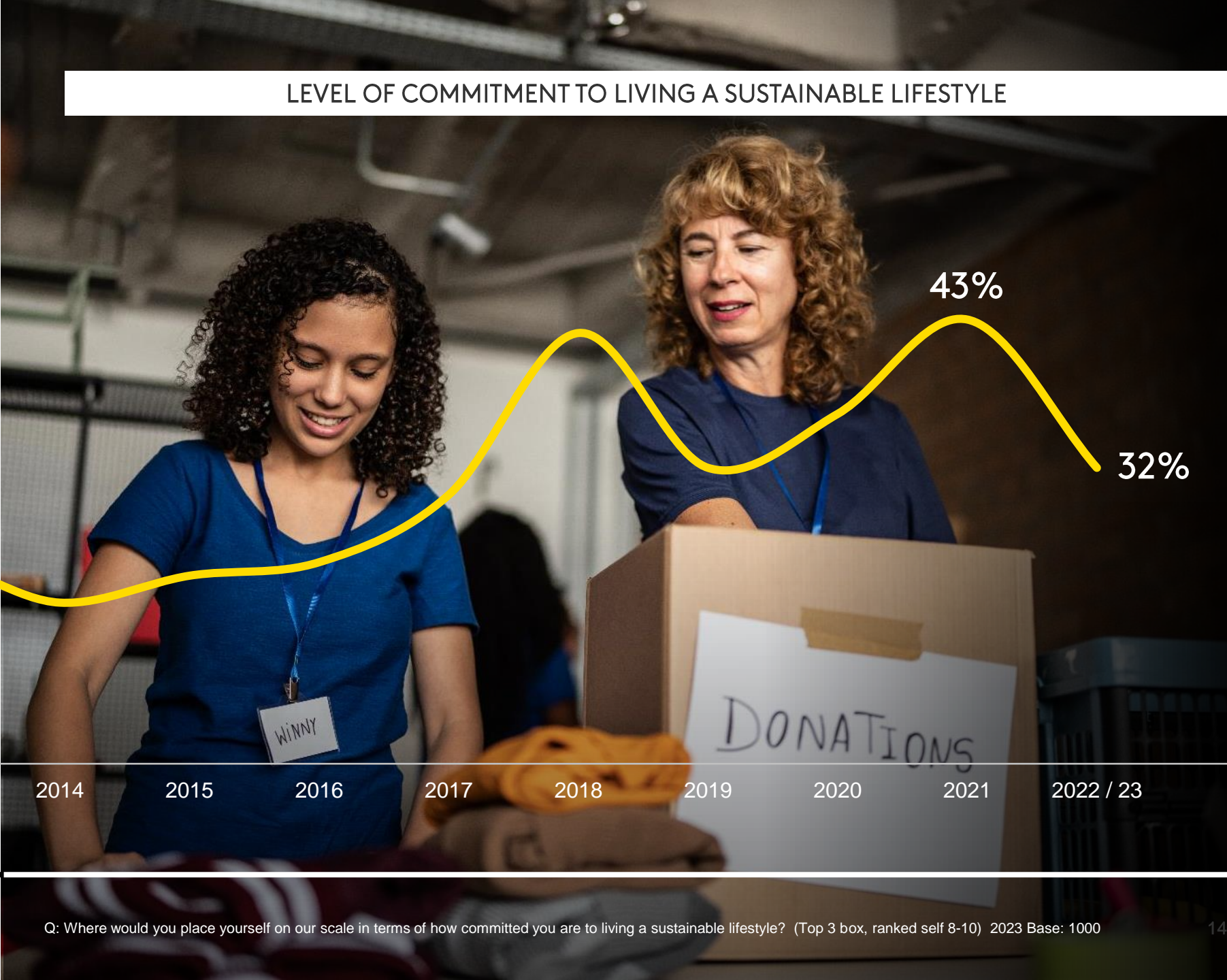


We know that people's level of commitment to living a sustainable lifestyle has more than doubled over the last 10 years

LEVEL OF COMMITMENT TO LIVING A SUSTAINABLE LIFESTYLE

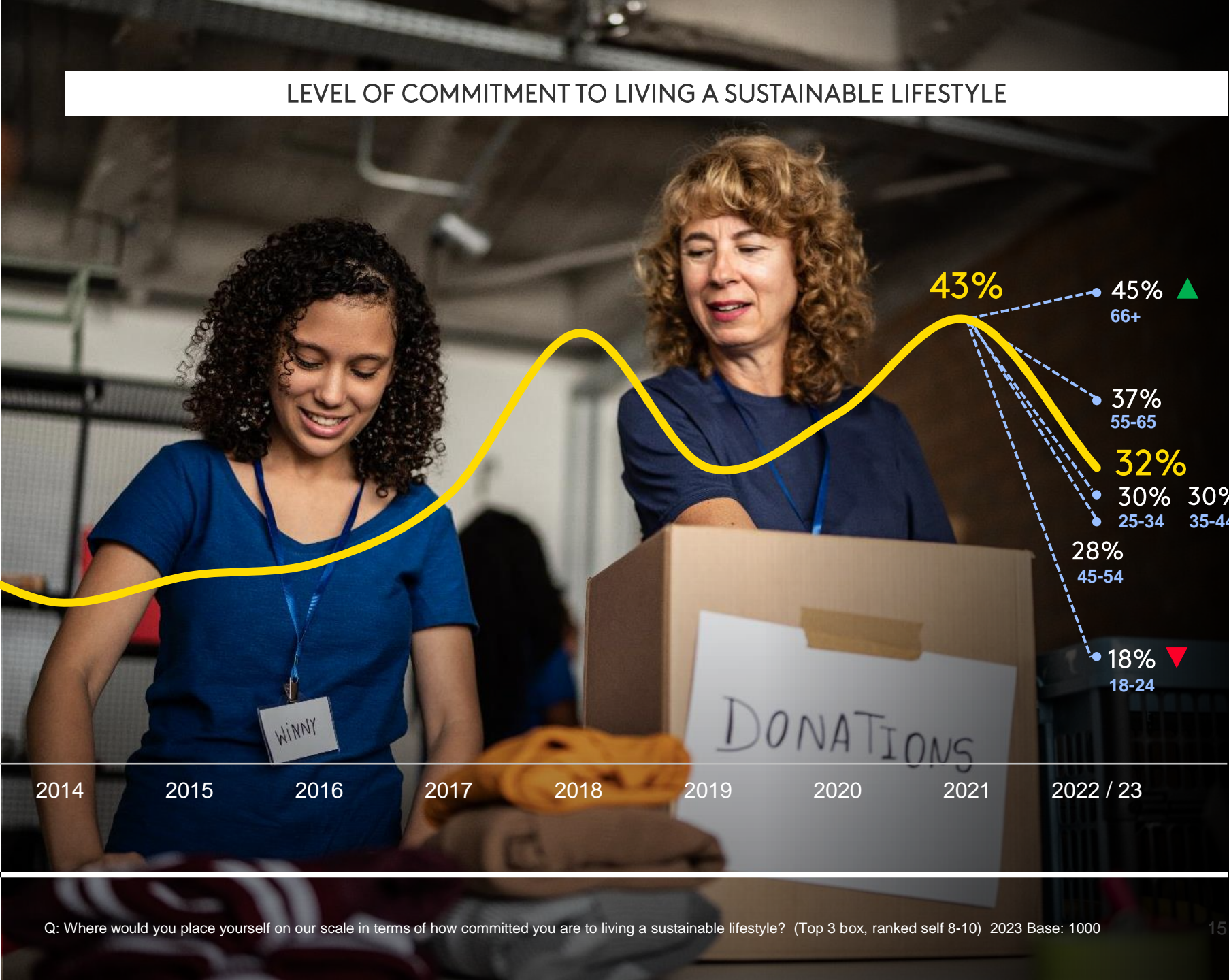


However, it is equally clear that the barriers to enabling that lifestyle commitment have measurably increased in the last 12 months



It's clear that the younger a NZ'er is the more their commitment to a sustainable lifestyle is being challenged

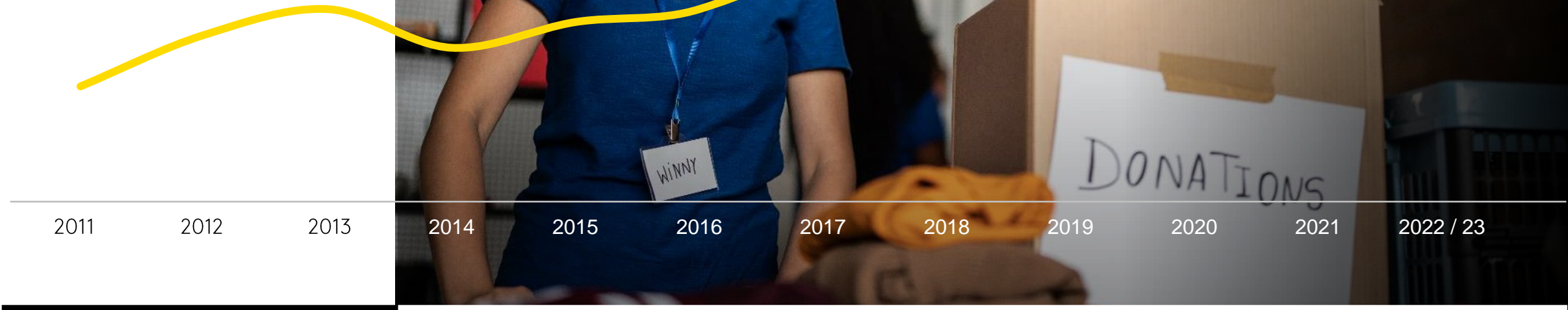
2011 2012 2013



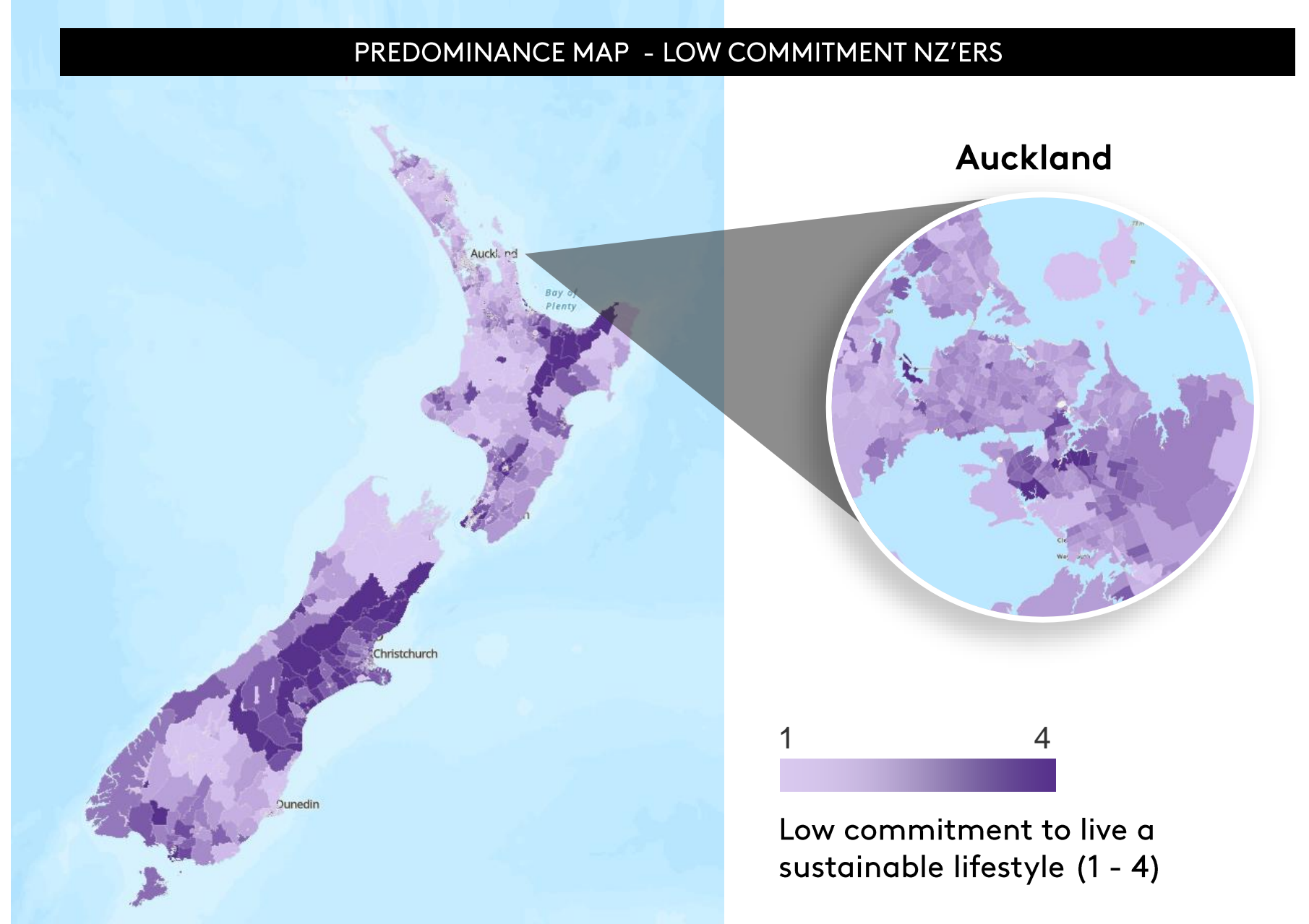
And that education is also a factor here



It is when understanding commitment by financial position that we see the clearest picture developing...



We can also see that we are more likely to find low commitment NZ'ers in BOP, Canterbury and parts of South Auckland



We are seeing a mild yet widespread decline in a range of behavioural measures...

I look for claims and labels for choices that are environmentally / animal friendly

53% ▼ -8%

I will make eco-conscious choices, even if it is a bit more expensive

46% ▼ -12%

I encourage others to make sustainable choices whenever possible

43% ▼ -15%

New Zealanders need to change their diet to save our environment

40% ▼ -7%

-/+%=vs 2022

...and collectively these changes touch many of what we now take to be basic everyday sustainable behaviours

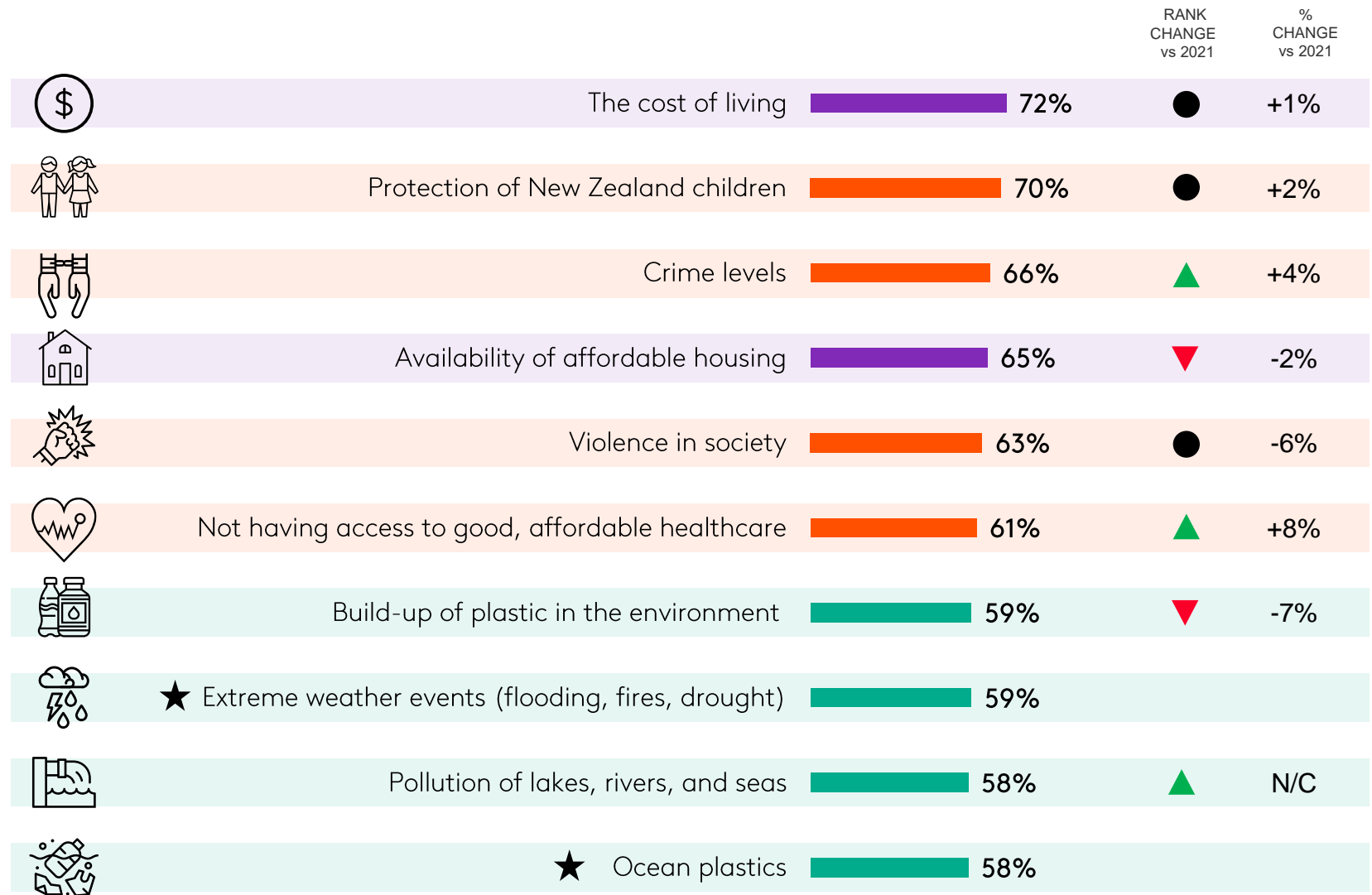


In terms of the key issues to NZ'ers, the **cost of living remains our primary issue of concern**

Economic
 Social sustainability
 Environmental
















Same position
 New Top 10 entrant
 Moved up
 Moved down

TOP 10 CONCERNS















































And not surprisingly, the cost of living is more of an issue of concern, the more you are struggling financially



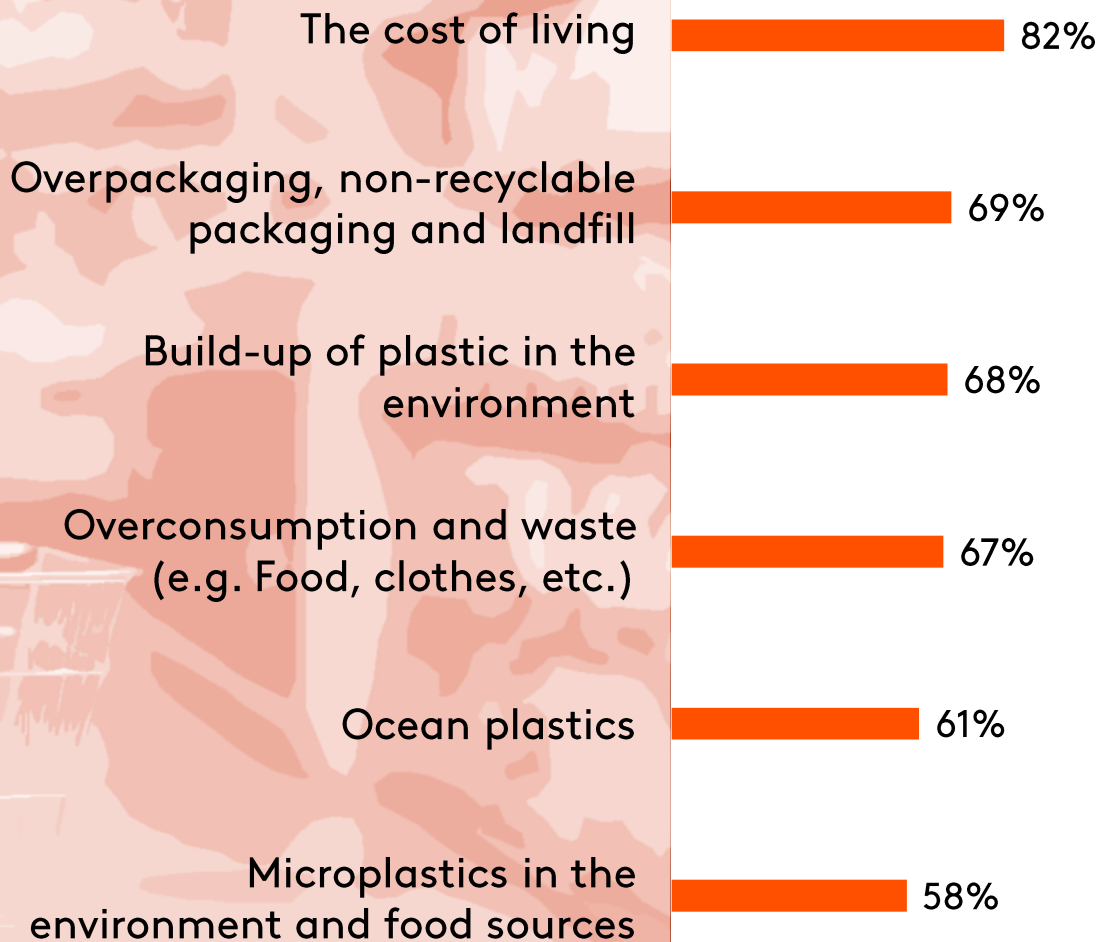
Comfortable	Managing	Struggling	
 Build-up of plastic in the environment	 Protection of New Zealand children	 The cost of living	1
 Protection of New Zealand children	 The cost of living	 Availability of affordable housing	2
 Microplastics in the environment and food sources	 Crime levels	 Protection of New Zealand children	3
 Extreme weather events (flooding, fires, drought)	 Violence in society	 Crime levels	4
 Abuse on Social Media	 Not having access to good, affordable healthcare	 Suicide rates	5

While less pressing, cost of living is still a top 5 issue of concern among our Eco-Actives

	 Actives	 Believers	 Considerers	 Dismissers
1	 Availability of affordable housing	 The cost of living	 The cost of living	 Protection of New Zealand children
2	 Build-up of plastic in the environment	 Crime levels	 Crime levels	 The cost of living
3	 Extreme weather events (flooding, fires, drought)	 Protection of New Zealand children	 Protection of New Zealand children	 Crime levels
4	 Protection of New Zealand children	 Not having access to good, affordable healthcare	 Not having access to good, affordable healthcare	 Standard of New Zealand education
5	 The cost of living	 Violence in society	 Extreme weather events (flooding, fires, drought)	 The state of the New Zealand economy
6	 Ocean plastics	 Availability of affordable housing	 Violence in society	 Violence in society
7	 Microplastics in the environment and food sources	 The protection of my personal data online	 Availability of affordable housing	 Availability of affordable housing
8	 Overpackaging, non-recyclable packaging and landfill	 Access to mental health services	 Pollution of lakes, rivers, and seas	 Access to mental health services
9	 Abuse on Social Media	 The state of the New Zealand economy	 Ocean plastics	 Caring for the ageing population
10	 The impact of climate change on New Zealand	 Transport infrastructure in New Zealand (e.g. Roads and rail)	 Build-up of plastic in the environment	 Not having access to good, affordable healthcare

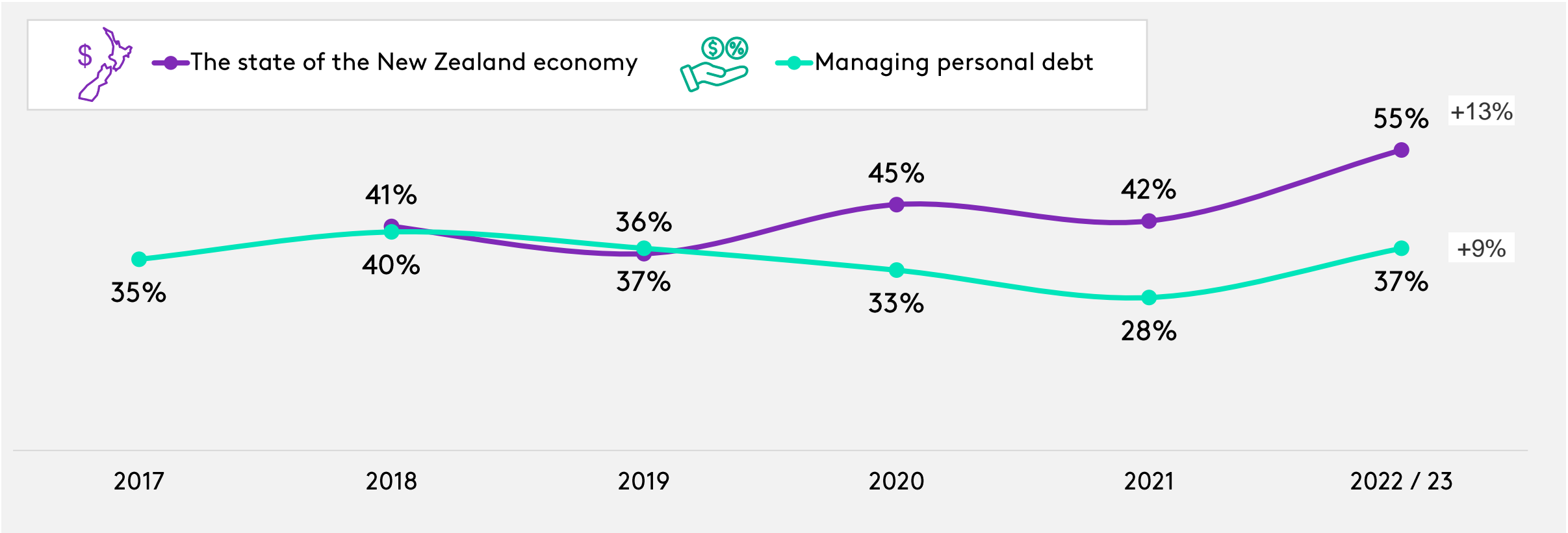
The cost of living is also the leading consideration when purchasing a good or service

IMPACT UPON PURCHASE



The two issues of greatest increase in 2023 are also related to managing household finances

% of those who are open to changing their lifestyle in the following ways



We can also see evidence that NZ'ers are pulling back on consumption more broadly – including eating out and buying & selling second-hand goods

2018 2019 2020 2021 2023





Companies should realise they have the money to make changes. Stop focusing on goals of 2030 or 2050 and focus on what can be done today.

Active, 45-55 years old

Everyday I am learning something about how I can help Papatuanuku, I try to follow these principles but sometimes it is the cost of the product that stops me.

Active, 66+ years old

My annual income does not allow me the ability to chose more expensive environmentally friendly goods or services.

Considerer, 66+ years old

Cost of living is my biggest concern related to what I purchase, not sustainability at the moment. Cost of living is now taking over sustainability.

Believer, 45-54 years old

I want to live more sustainably but with the cost of living at the moment it becomes hard.

Active, 18-24 years old





I'm irritated that everything green costs more. We're on the edge financially and don't have \$ to waste on more green options (sometimes marketing spin to justify raised \$)...right now people are getting hammered with \$ and judgement if they use their gas cars etc. Everyone talks a good game, but \$ and quality are still the real main drivers of what people choose & convenience always needs to factor in. Cost of living increase is definitely impacting my ability to be as sustainable as I'd like. I do my best though.

Believer, 35-44 years old

It's easier to live more sustainably if you have money food wise. Using recycled clothing is no problem and saving power etc but food kinder on animals and more organic - you either go without or grow it yourself. So no meat or eggs because you can't afford them and grow your own vegies if the weather allows your garden to provide well. The struggle is real but some of us are trying. I personally see big business recording huge profits but not giving a shit about the income earner doing their best slogging away trying to make a difference and feeling like they are getting nowhere.

Active, 35-44 years old



2 | Understanding the impact of extreme weather events

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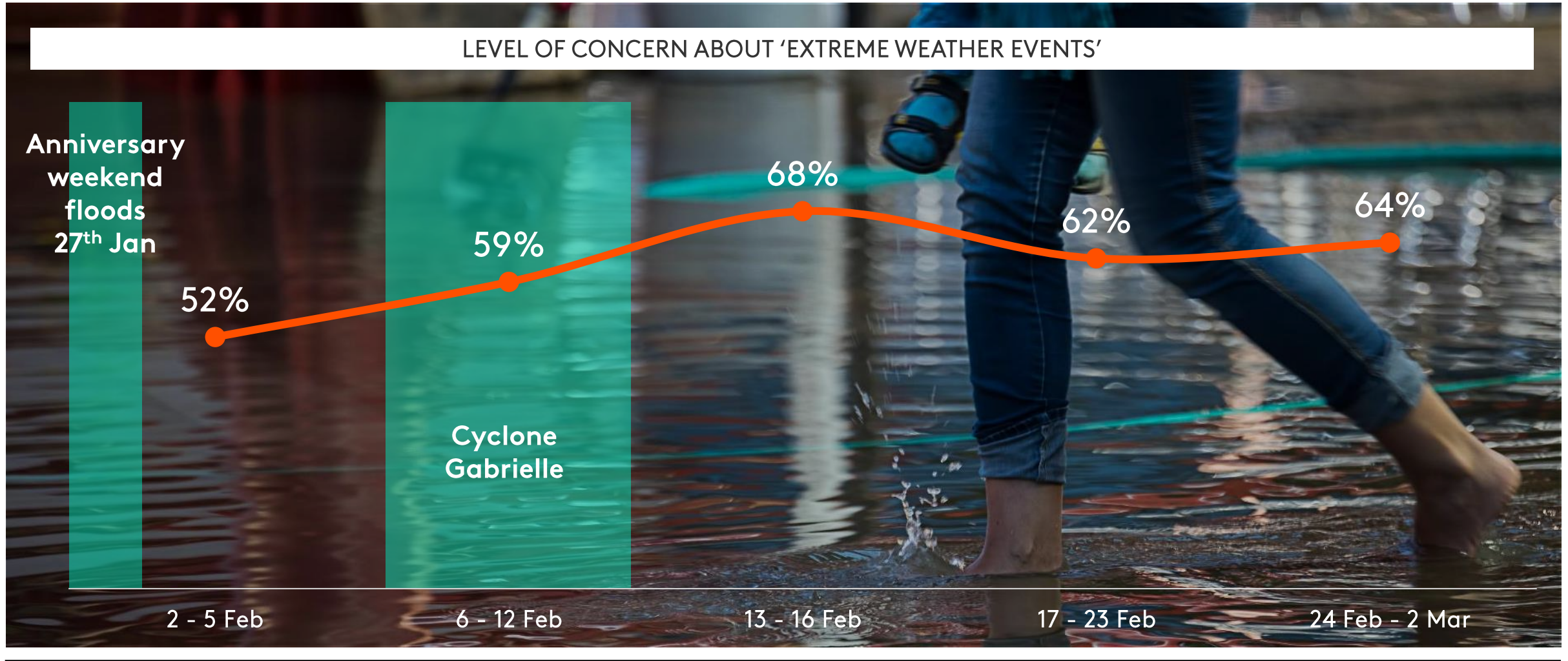


This national disaster should be a wake-up call. We need to build more sensibly and put money into improving infrastructure - more maintenance - less prone to disasters. Forget the nice to haves and get the basics right first and let future generations build on a better foundation... All companies should be regulated to make their environmental footprints more sustainable and help prevent these natural (unnatural) disasters less impactful.































Considerer, 66+ years old



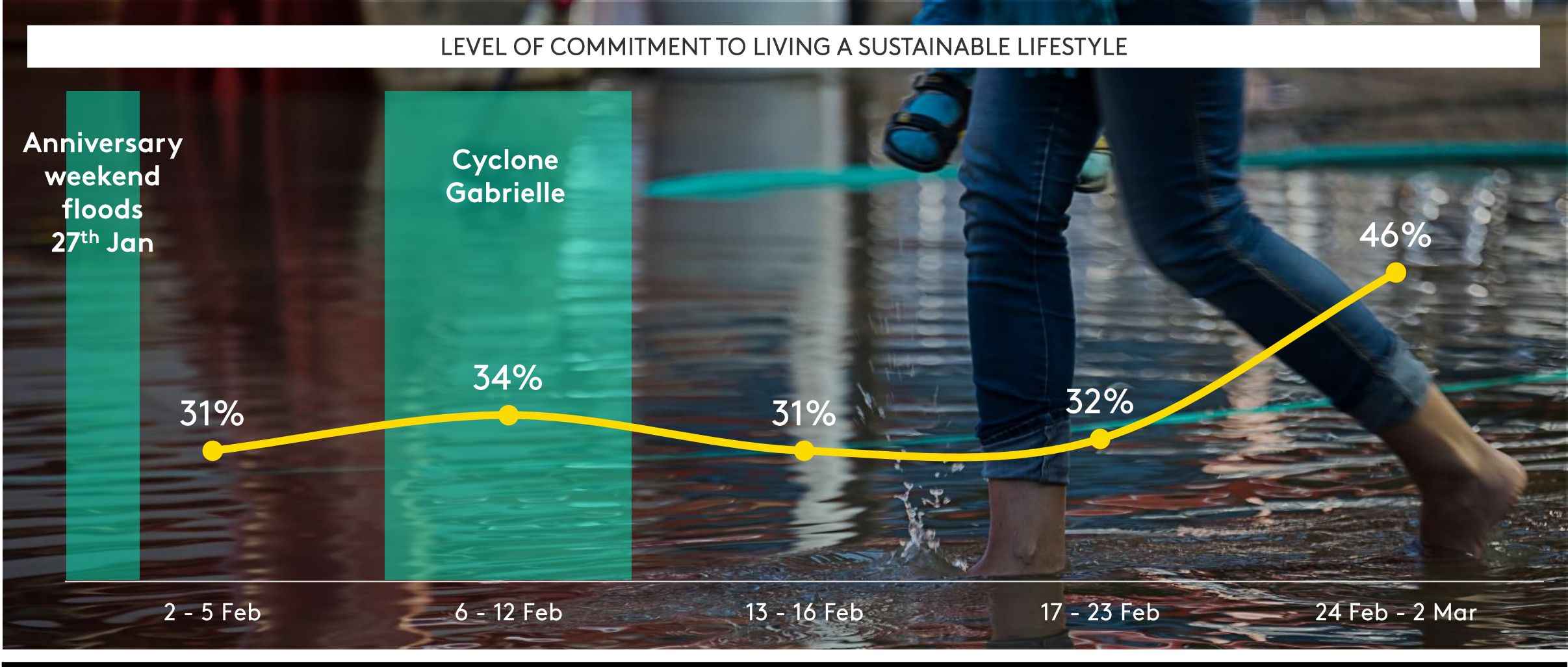
Extreme Weather Events is #8 in terms of NZ'ers most concerning issues;
increasing 12% in importance in response to the Floods & Cyclone Gabrielle...



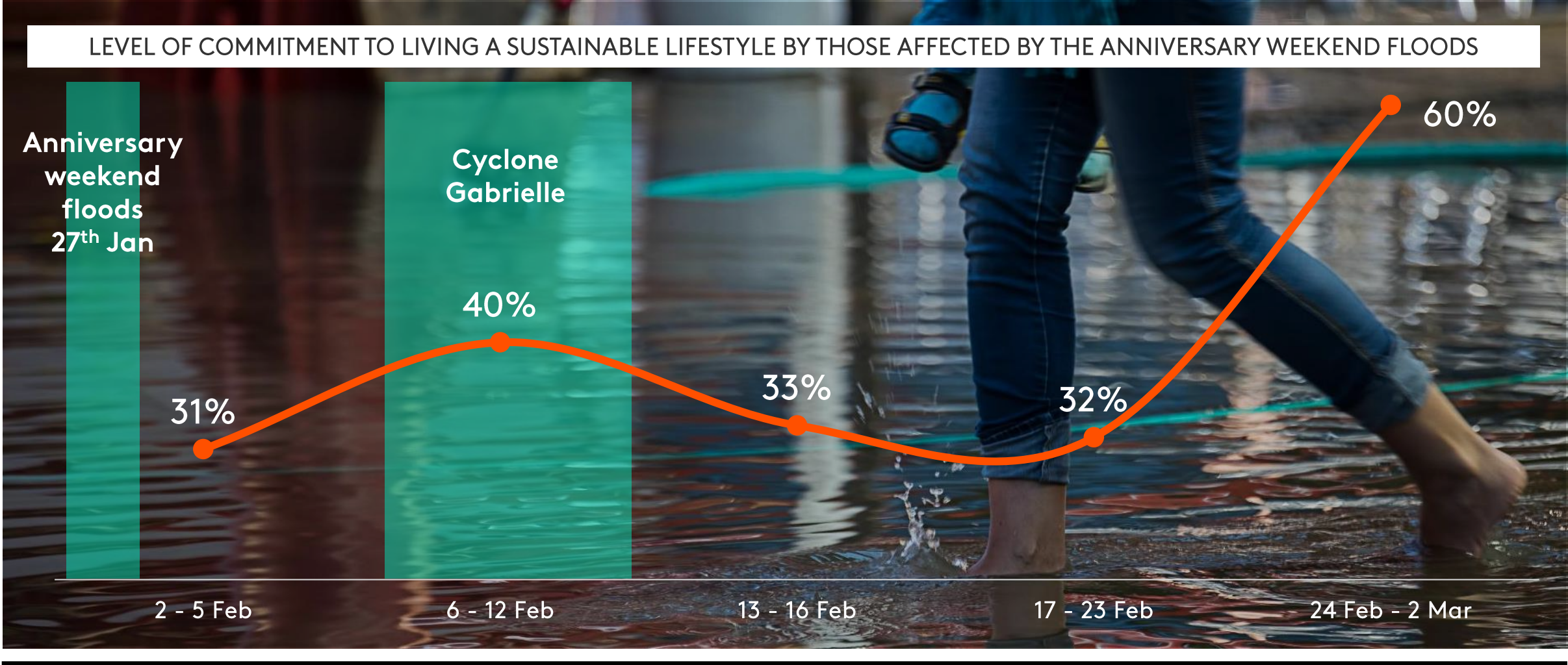
...however it is more important among younger & more educated NZ'ers

UNIVERSITY DEGREE	POSTGRADUATE DEGREE		18-29	30-49
 The cost of living	 Extreme weather events	1	 The cost of living	 The cost of living
 Availability of affordable housing	 Warming and rising seas	2	 Availability of affordable housing	 Protection of New Zealand children
 Protection of New Zealand children	 Transport infrastructure in New Zealand	3	 Protection of New Zealand children	 Crime levels
 Extreme weather events	 Protection of New Zealand children	4	 Crime levels	 Availability of affordable housing
 Crime levels	 Violence in society	5	 Access to mental health services	 Suicide rates
		6	 Extreme weather events	 Extreme weather events
		7	 The state of the New Zealand economy	 Ocean plastics
		8	 Transport infrastructure in New Zealand	 Overpackaging, non-recyclable packaging and landfill
		9	 Ocean plastics	 Mental wellbeing of New Zealanders
		10	 Not having access to good, affordable healthcare	 Violence in society

While the commitment impact of the floods were minimal & temporary there is some suggestion that the cyclone may have had greater impact



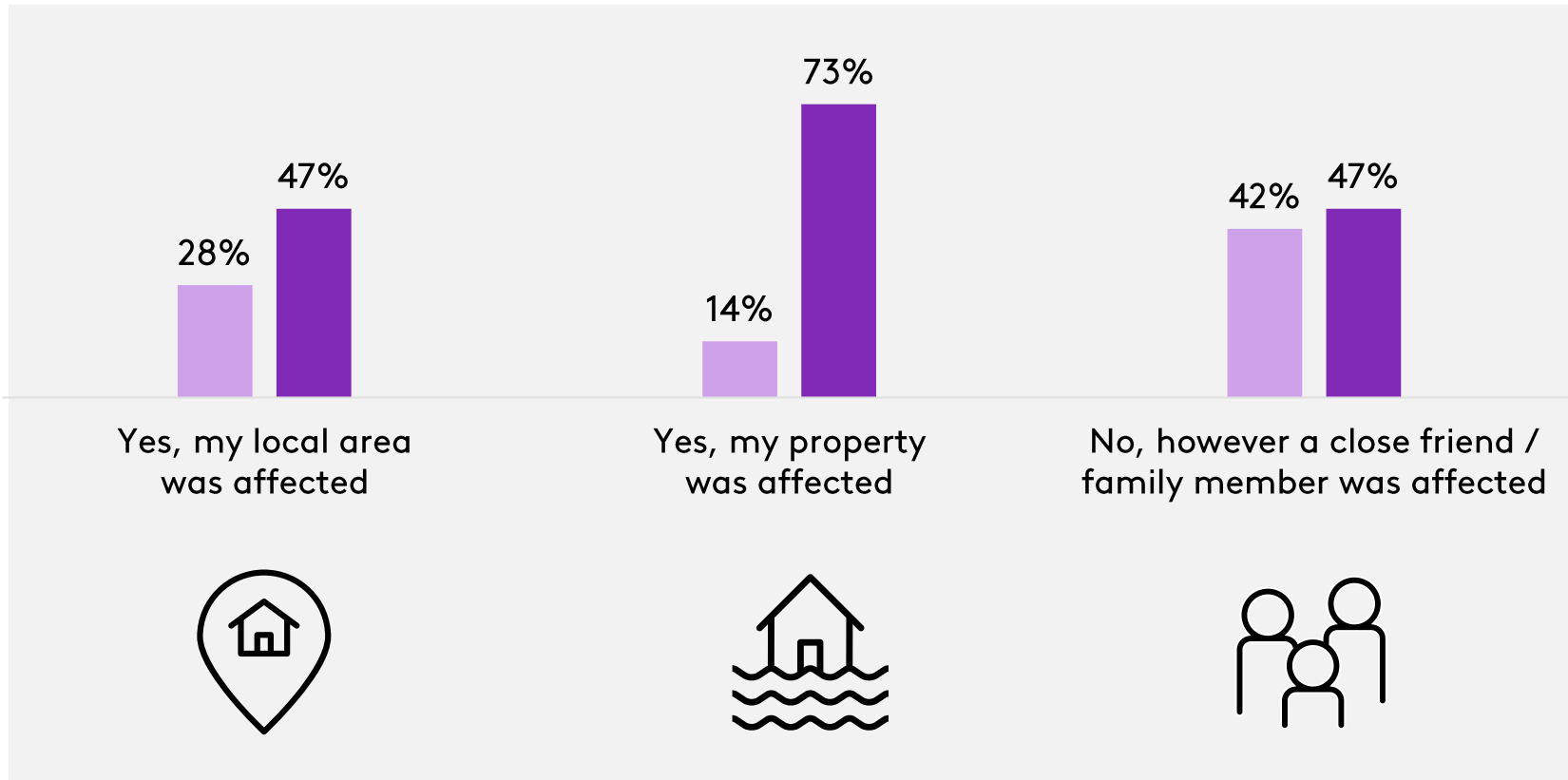
Understanding those specifically affected however does show a greater degree of impact, and we can see this in response to the floods...



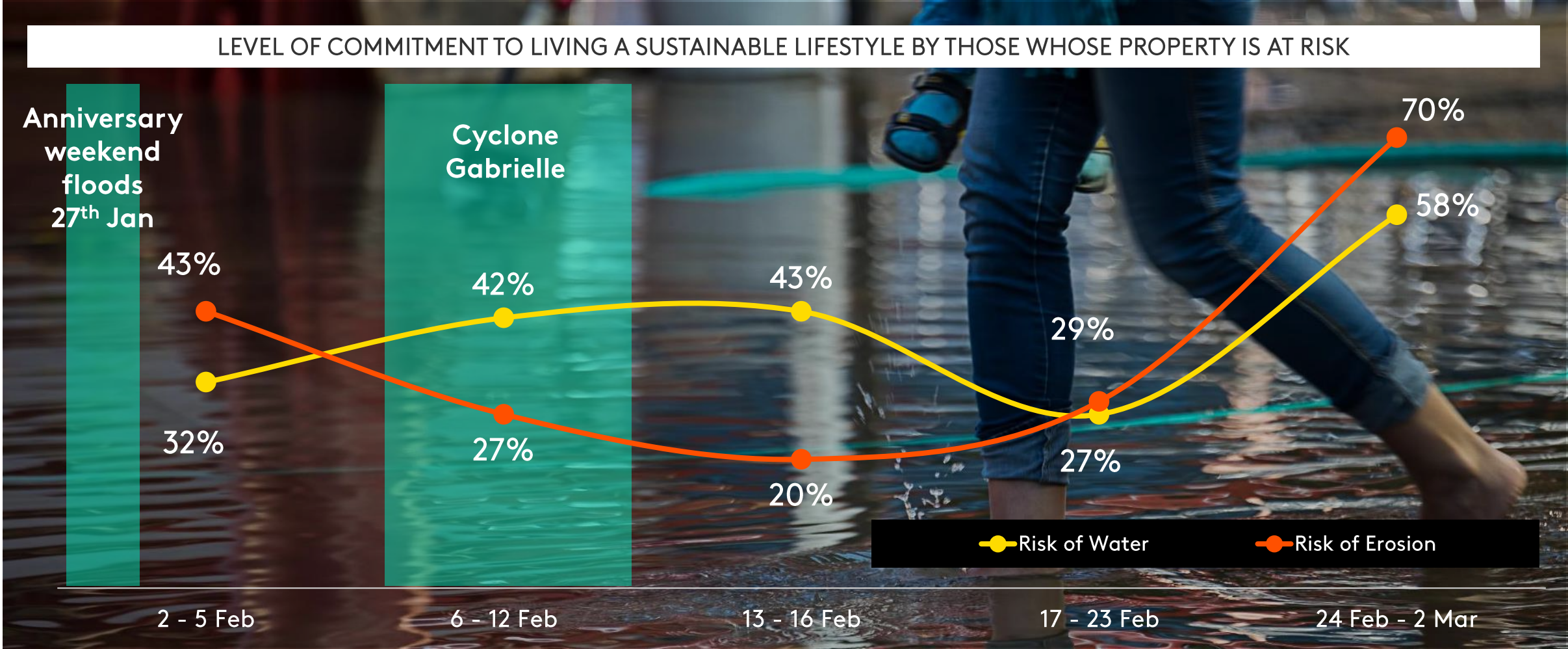
...and in response to the cyclone

LEVEL OF COMMITMENT TO LIVING A SUSTAINABLE LIFESTYLE BY THOSE WHO WERE AFFECTED BY CYCLONE GABRIELLE

17 - 23 Feb 24 Feb - 2 Mar

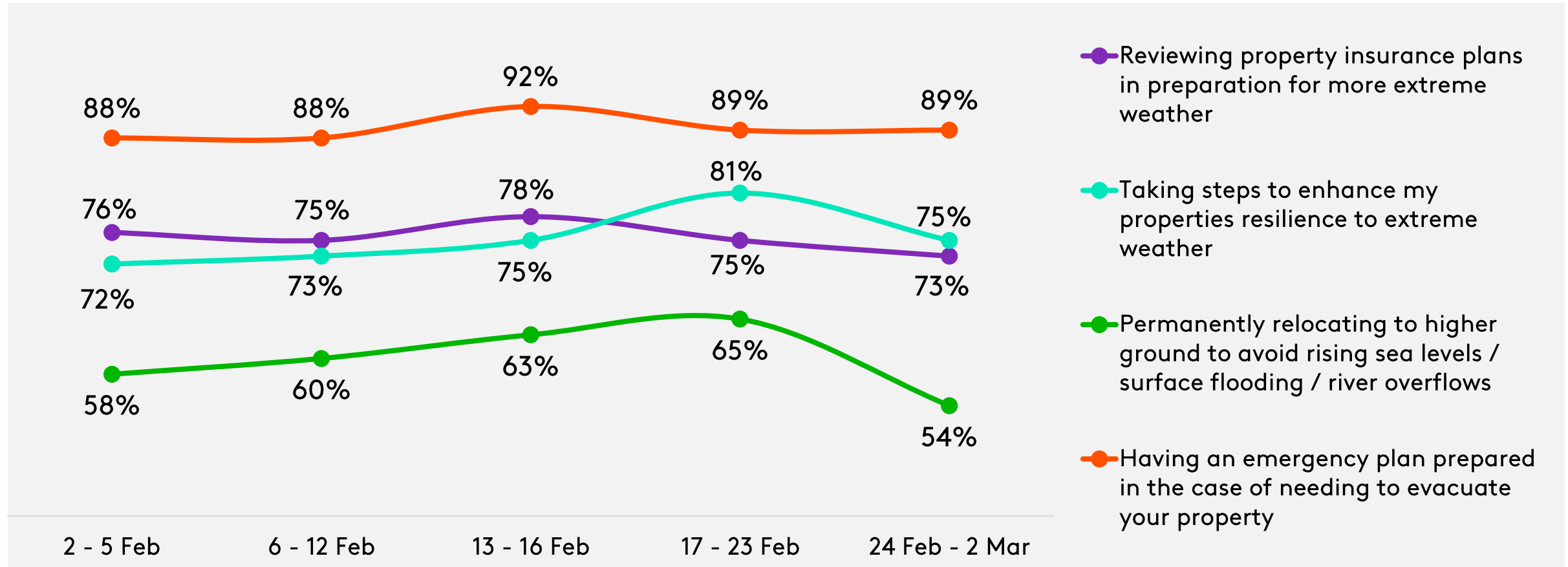


And we also see this impact upon sustainability commitment among those whose are at risk of either water or erosion impact

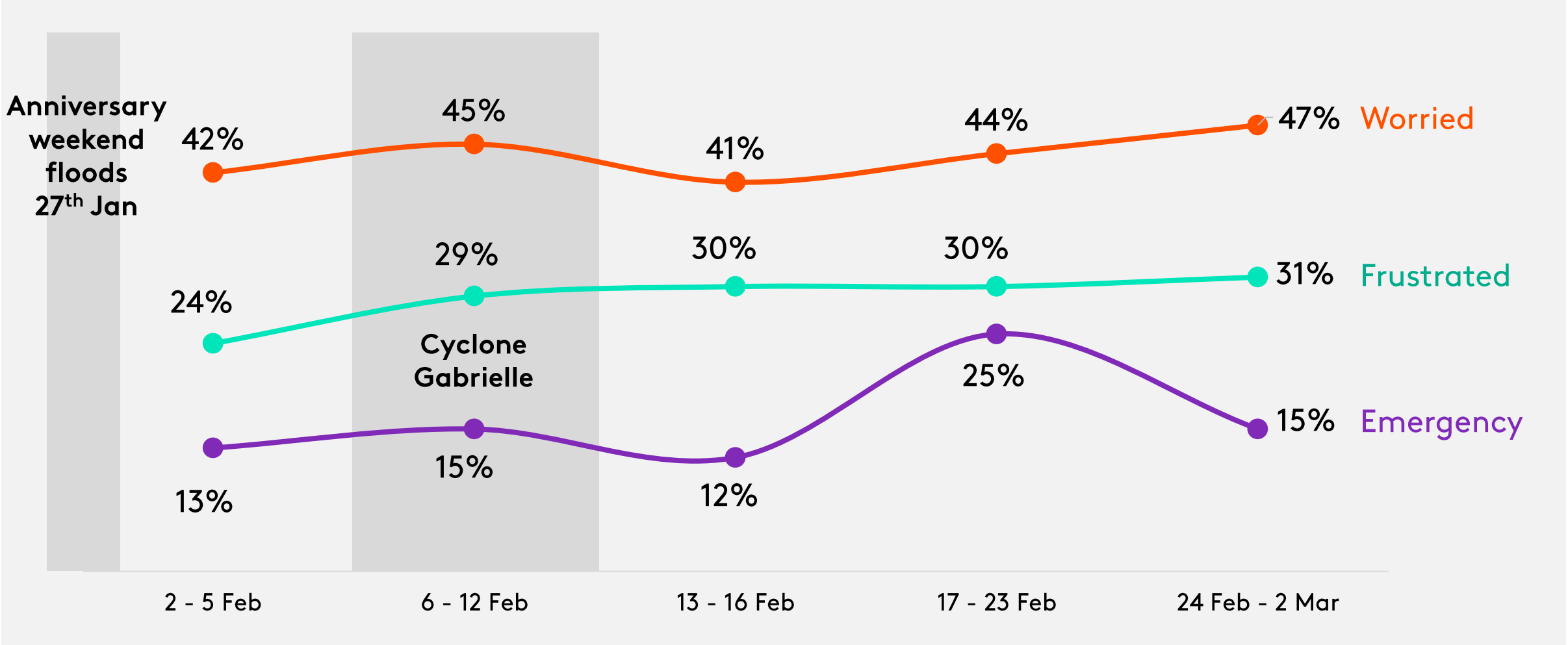


However, there appears to be little significant impact upon NZ'ers adaptation openness in response to the weather events

% of those who are open to changing their lifestyle in the following ways



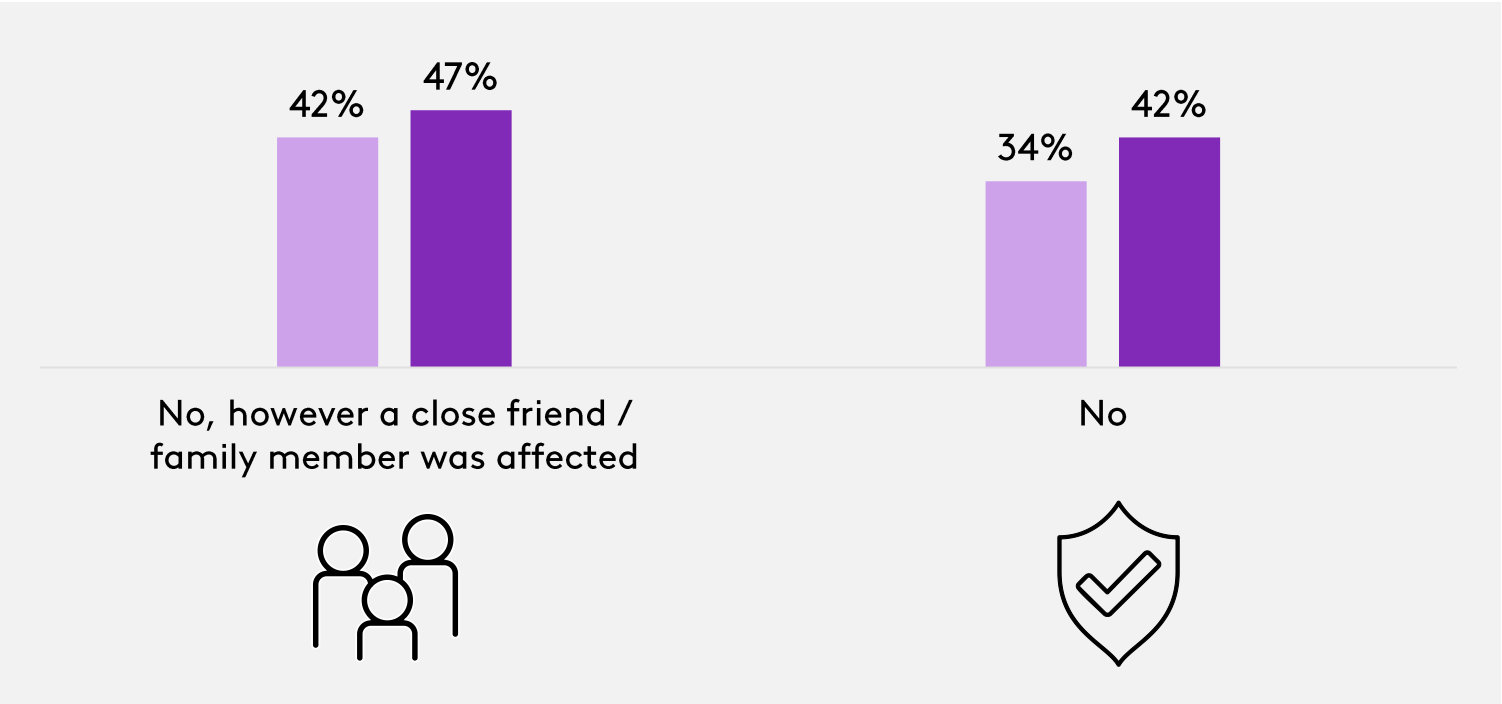
Also, we see that the impact upon negative emotions – particularly the feeling of worrying - was relatively modest



What is very important and notable is the far lower impact that the weather events have had upon those who were not affected

LEVEL OF COMMITMENT TO LIVING A SUSTAINABLE LIFESTYLE BY THOSE WHO WERE NOT AFFECTED BY CYCLONE GABRIELLE

17 - 23 Feb 24 Feb -2 Mar



To put this change in commitment in perspective, we are seeing an increase in commitment equal or less to that which we would normally expect to occur anyway

9%

Increase in commitment
without extreme weather events



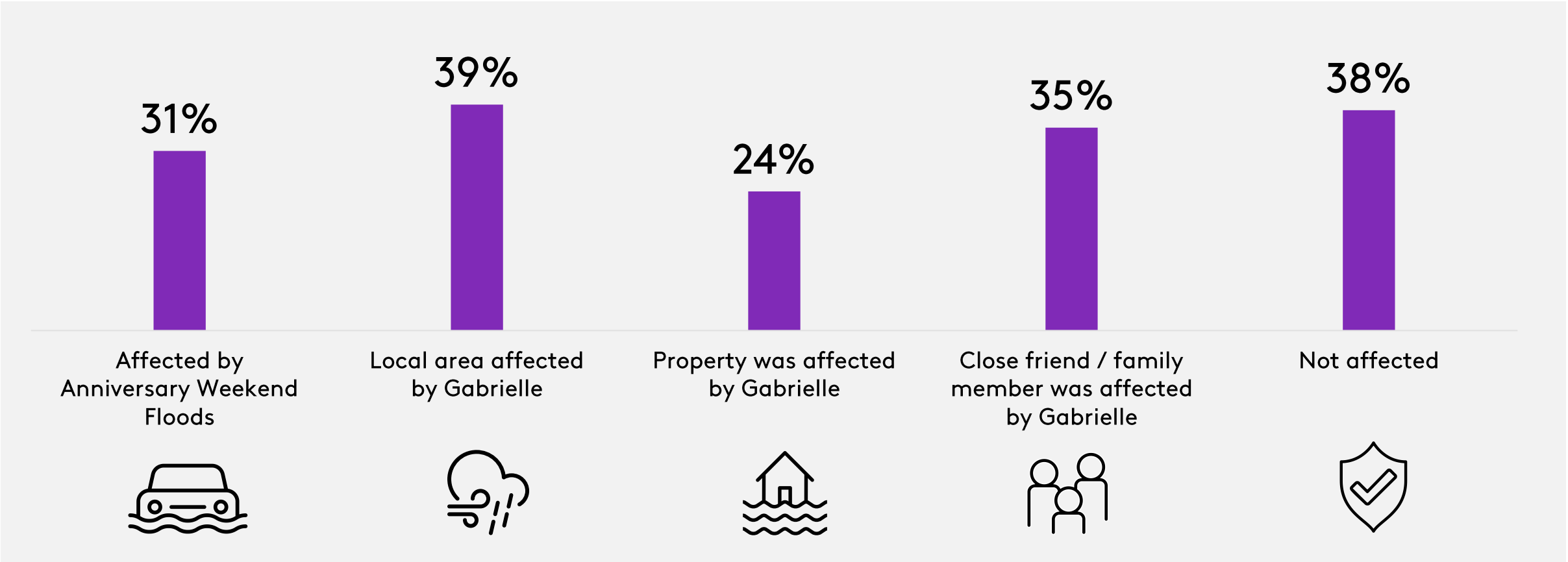
8%

Increase in commitment
in response to weather events



And perhaps the issue of greatest surprise is the proportion of those who were affected who still don't rate Extreme Weather as an issue of concern

% of those affected by weather events who do NOT see Extreme Weather Events as an issue of concern

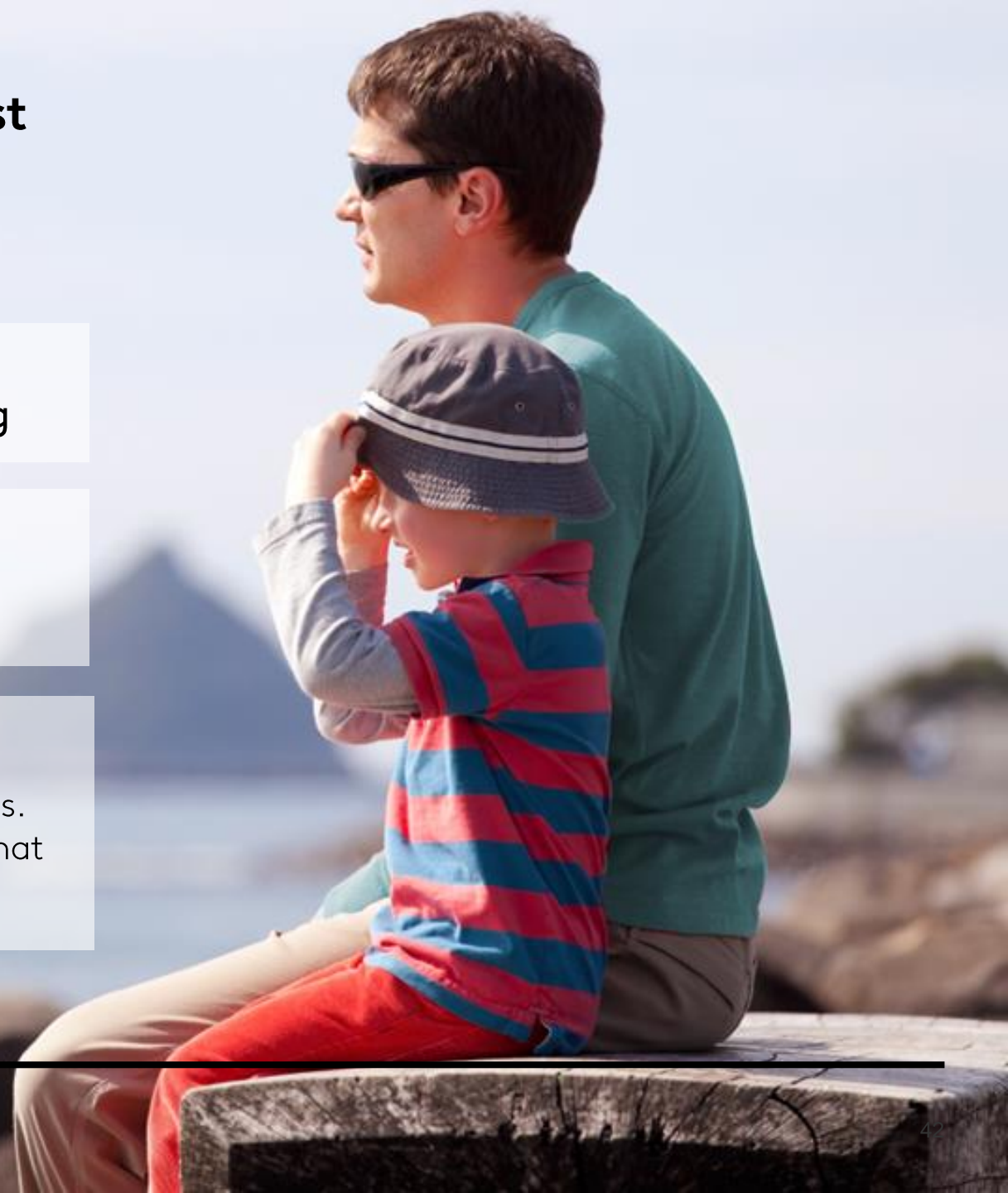


Among a wide range of drivers of this modest impact in response to the recent weather events, there are three that stand out...

A There are significant practical barriers to commitment in place – namely the cost of living

B Salience has a huge impact
Is this sticking out to me right now? How long will this impact last?

C You are battling a worldview – not an issue
People generally don't process & respond via single issues. Instead they filter events through worldview narratives that already exist regarding what they value & what is true



3

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It's hard to make a meaningful difference as an individual - But collectively we can encourage corporations to become more sustainable (given that they are generally led by profit) by choosing where and how we shop.

Active, 45-54 years old



We see the same leading brands in terms of spontaneous association with sustainability in NZ



Upon prompting, a number of NZ businesses are all associated with sustainability among at least 50% of NZ'ers

60%+ AGREE

ecostore



FISHER & PAYKEL



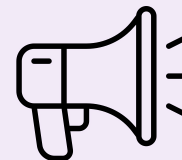
50 - 59% AGREE

There are still significant perceived challenges in terms of how NZ consumers view businesses



NETT % Agree

66%



The way businesses talk about their social and environmental commitments is confusing

66%



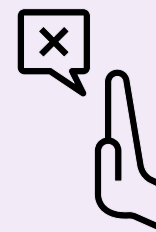
If I heard about a company being irresponsible or unethical, I'd stop buying their products or using their services

69%



I don't think businesses are doing enough to reduce their environmental impact

63%



Businesses act in conflict to what they say or advertise

Most brands are less likely to be seen as sustainable in 2023

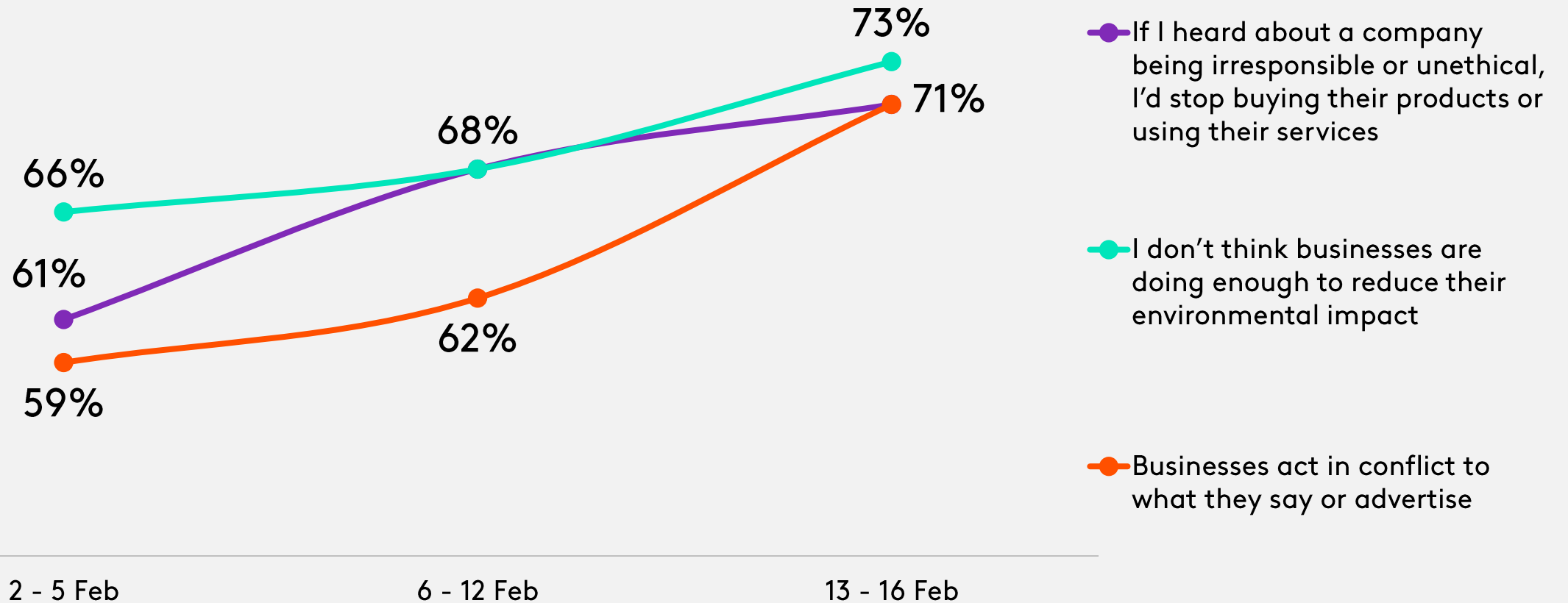
60%+ AGREE

50 - 59% AGREE



And we can see that the weather events have worsened a number of these perceptions

% of those who agree with the following statements



4 | In summary

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NZ'ers continue to aspire to do the right thing

However intent is evolving faster than action – in fact action in many cases is going backwards

We know that the cost of living is putting a significant handbrake on NZ'ers ability to choose the better option – even without factoring in the other well know barriers such as convenience, effort etc





Meanwhile, the consumer response to the summer's weather appears relatively modest

There is evidence of a temporary impact of the extreme weather events upon commitment – and the length of this impact is highly likely to be impacted by the salience of the events.

While the claimed impact upon those affected or at risk appears far stronger, among the rest of NZ'ers we are seeing an impact upon commitment very likely less than would happen without any extreme weather at all.



We are seeing a strong suggestion of people's existing worldview impacting their reactions here

The tension between mitigation & adaptation remains complex - NZ'ers appear more open to moving than in addressing the root cause of increasing temperatures

Perhaps the issue of greatest surprise is the 24-39% of those who were affected who still don't rate Extreme Weather as an issue of concern





The gap between consumer needs and the perceived ability of businesses to meet them has increased

Major businesses are less associated with sustainability and 2/3 of NZ'ers still believe that businesses are confusing, untrustworthy and not doing enough.



NEXT STEPS...

- Continue to navigate the challenge of making **better choices accessible to NZ'ers**
- Or if you are premium priced then **price fairly** and be **transparently trustworthy**
- Collectively **maintain salience of the events, the impact and the causes.**
This weather crisis is presenting as a wasted opportunity regarding mitigation impact
- Actively (collectively) **counter the worldview** – that it's too late to do anything, that I can't make a difference, that no one is trustworthy

Better Futures 2023

For more information
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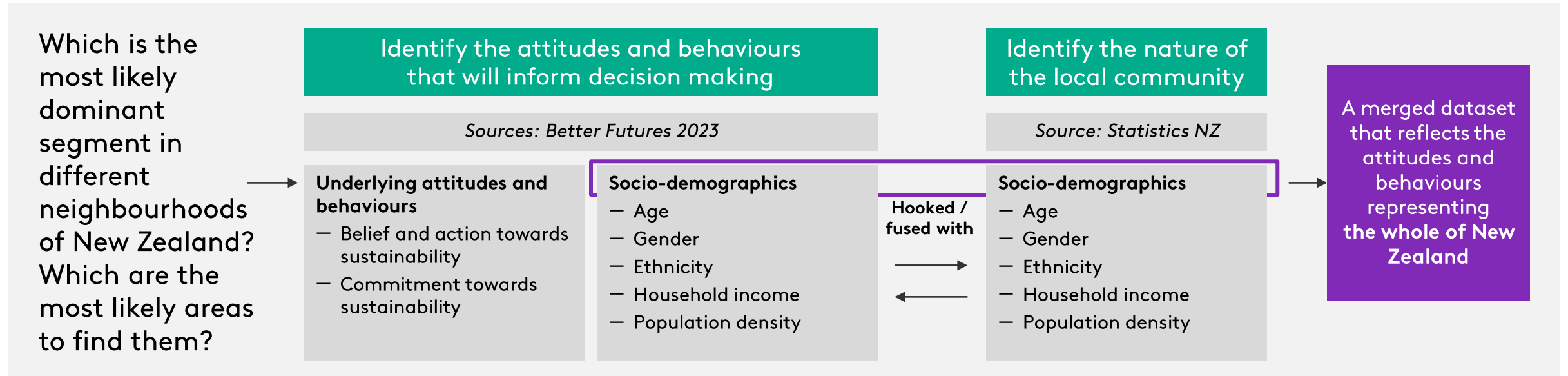


5

More about Kantar Neighbourhoods

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Kantar Neighbourhoods uses multiple datasets and statistical techniques to paint a holistic picture of locations of dominant segments



KANTAR NEIGHBOURHOODS:

A data management platform that uses data fusion and other techniques to merge disparate datasets into one integrated whole – accessible via an interactive, intuitive interface

The potential
depth of the data



16 regional authorities
in New Zealand
Region

67 territorial authorities
in New Zealand
A city or a district council

2,255 SA2s
SA2s are typically suburbs and
replace the Area Unit geography

29,895 SA1s
SA1s have an ideal size range of
100–200 residents

Data behind the dashboard

DATA CURRENTLY AVAILABLE



Demographics data such as age, gender, ethnicity, education, socioeconomic deprivation index from Census & Department of Public Health



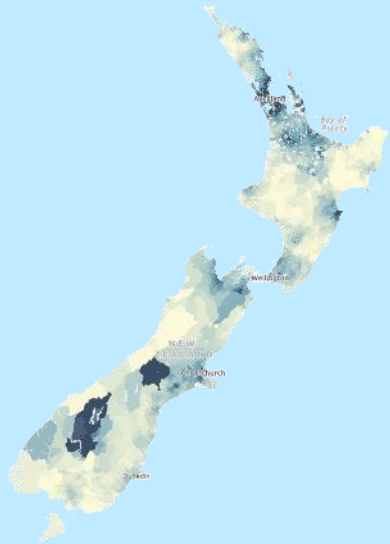
Other behavioural data such as types of energy used for heating and motor vehicles owned from Census

ADDITIONAL DATA AVAILABLE

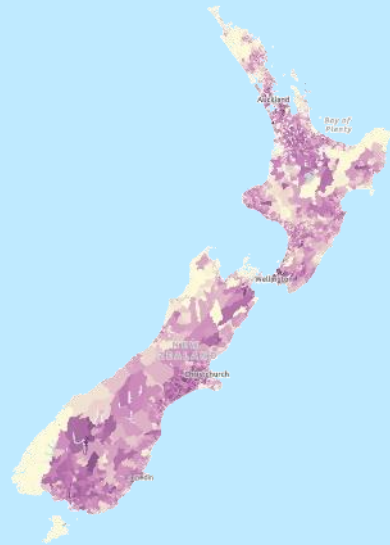


Data from your own research projects

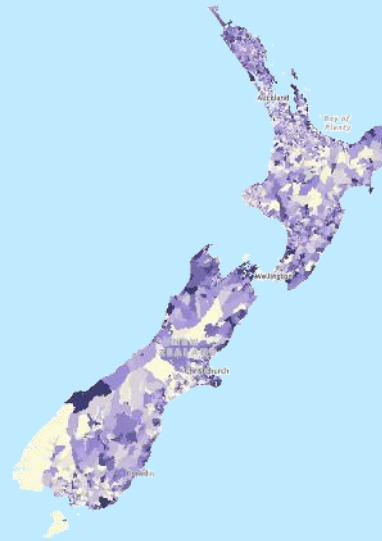
Multiple datasets from different sources can be overlaid to gain a detailed understanding by geographic area



House
valuation data



Income
data



Age
distribution data



Attitudinal
data



Potential
Segments