

KANTAR

BETTER  
FUTURES

2025

Sustainable  
Business Council



WBC  
Global  
Network





## The state of play of Sustainability

01



## Environmental & Social Sustainability

02



## Perceptions of NZ Businesses

03

# Methodology Details

MAIN SAMPLE

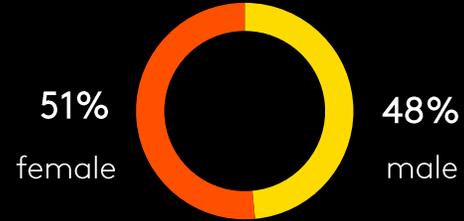
Fieldwork dates:  
24<sup>th</sup> Jan – 5<sup>th</sup> Feb

Sample Size:

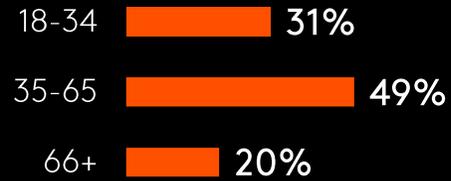
**1010**

## Nationally representative

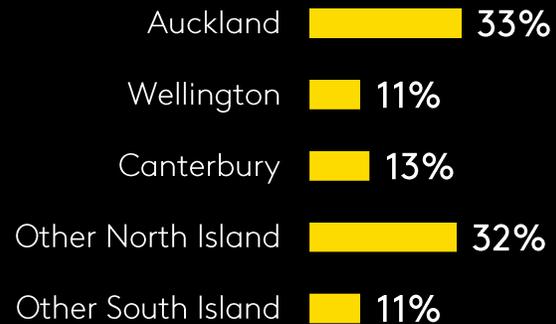
### Gender



### Age



### Region



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# 01

## The state of play of Sustainability

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# The environment within which New Zealanders are operating is being impacted by a number of major forces

## Politics

The politicisation of sustainability in certain geographies, including the US and Europe, is contributing to a renewed focus on fossil fuels, a weakening of ESG regulations, and a prioritisation of national identity over diversity, equity, and inclusion (DEI) initiatives

## Macroeconomics

In Aotearoa the cost of living and inequality are also seen by business as impediments to national economic performance

Coupled with an infrastructure deficit, businesses believe this will continue to impact productivity gains

## Demographics

In Aotearoa nearly 30% of New Zealanders were now born overseas, and three in four people live in the North Island

Record breaking numbers of people under 30 left Aotearoa in 2024, impacting the future workforce and succession planning

This has exacerbated the scarcity of sustainability-related skills in Aotearoa

## Climate & Nature

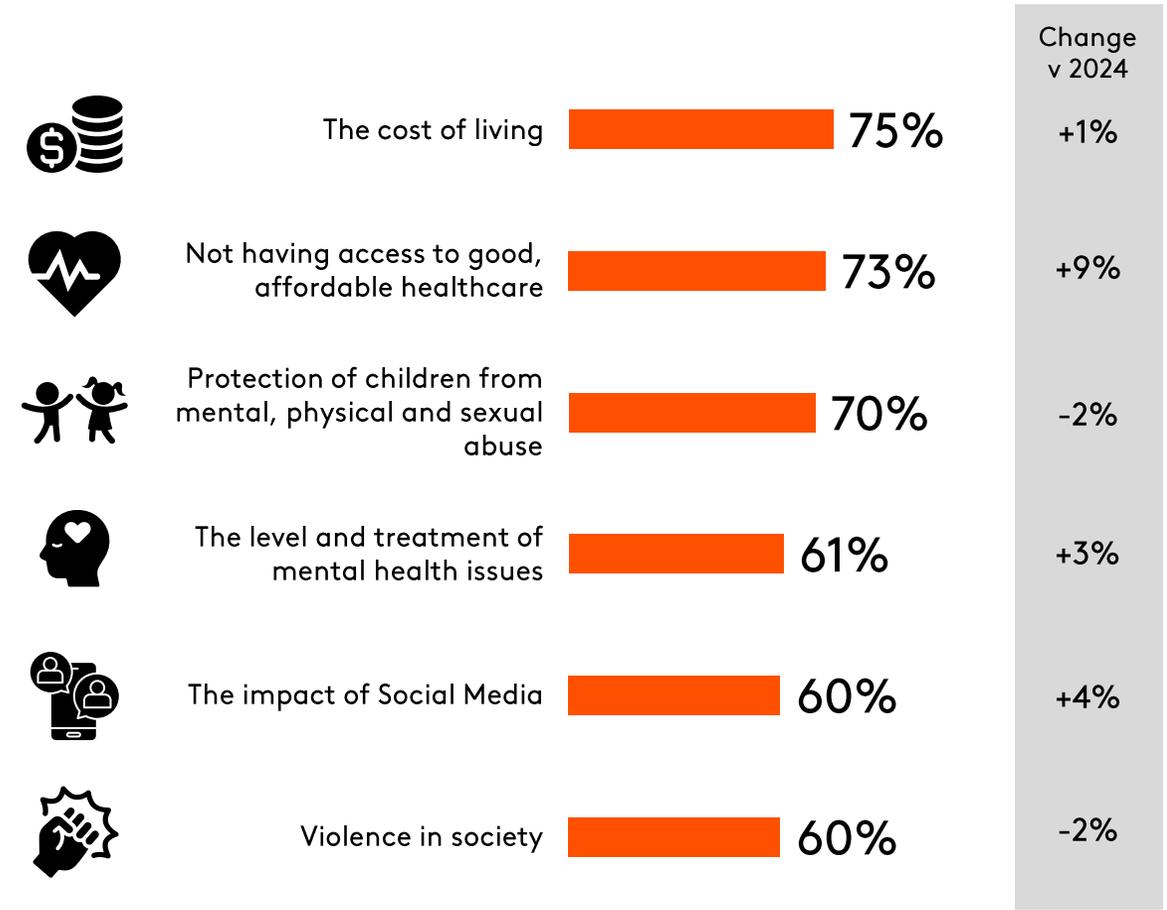
Global temperatures have now surpassed the 1.5°C threshold for the first time, with 2024 the hottest year on record

Closer to home, many parts of Aotearoa are experiencing the long shadow of Cyclone Gabrielle, including horticultural hub Hawkes Bay, where orchards continue to lose fruit trees to lasting damage

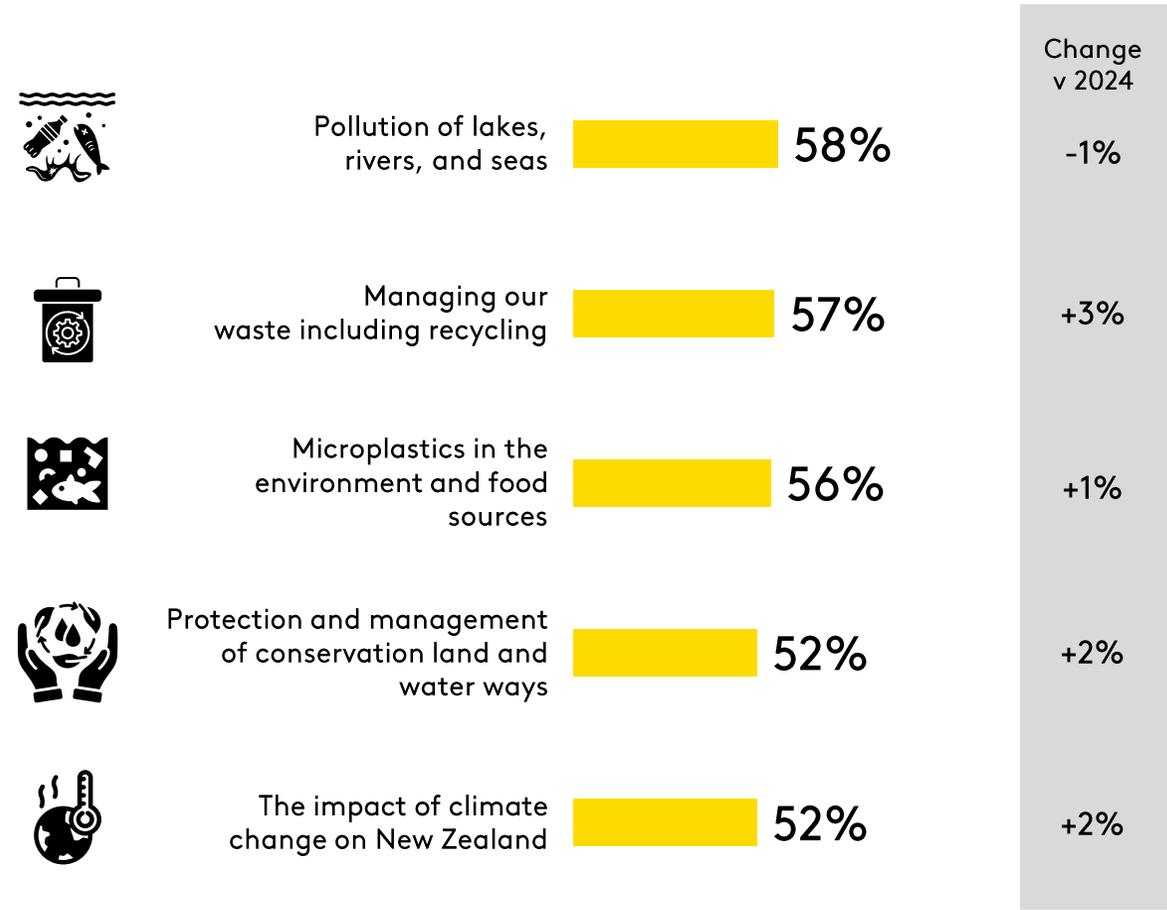
At a national level, Aotearoa's climate policies are also no longer enough to keep warming at 1.5°C

# In terms of the key issues to New Zealanders, the cost of living remains #1, while access to healthcare has increased significantly by 9%

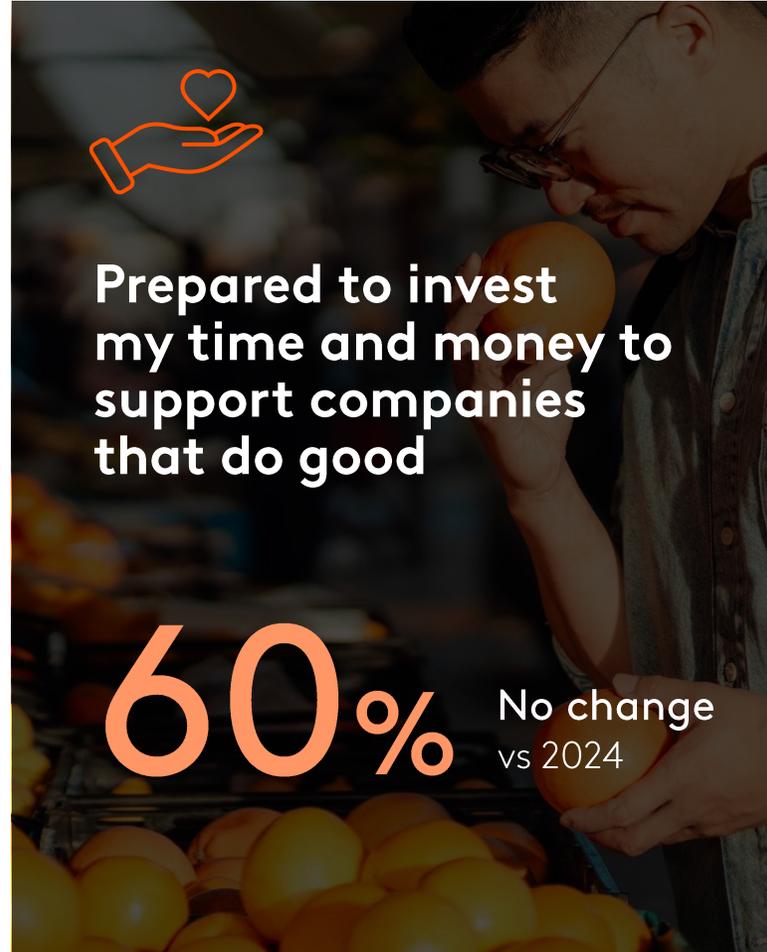
## TOP 5 OVERALL CONCERNS



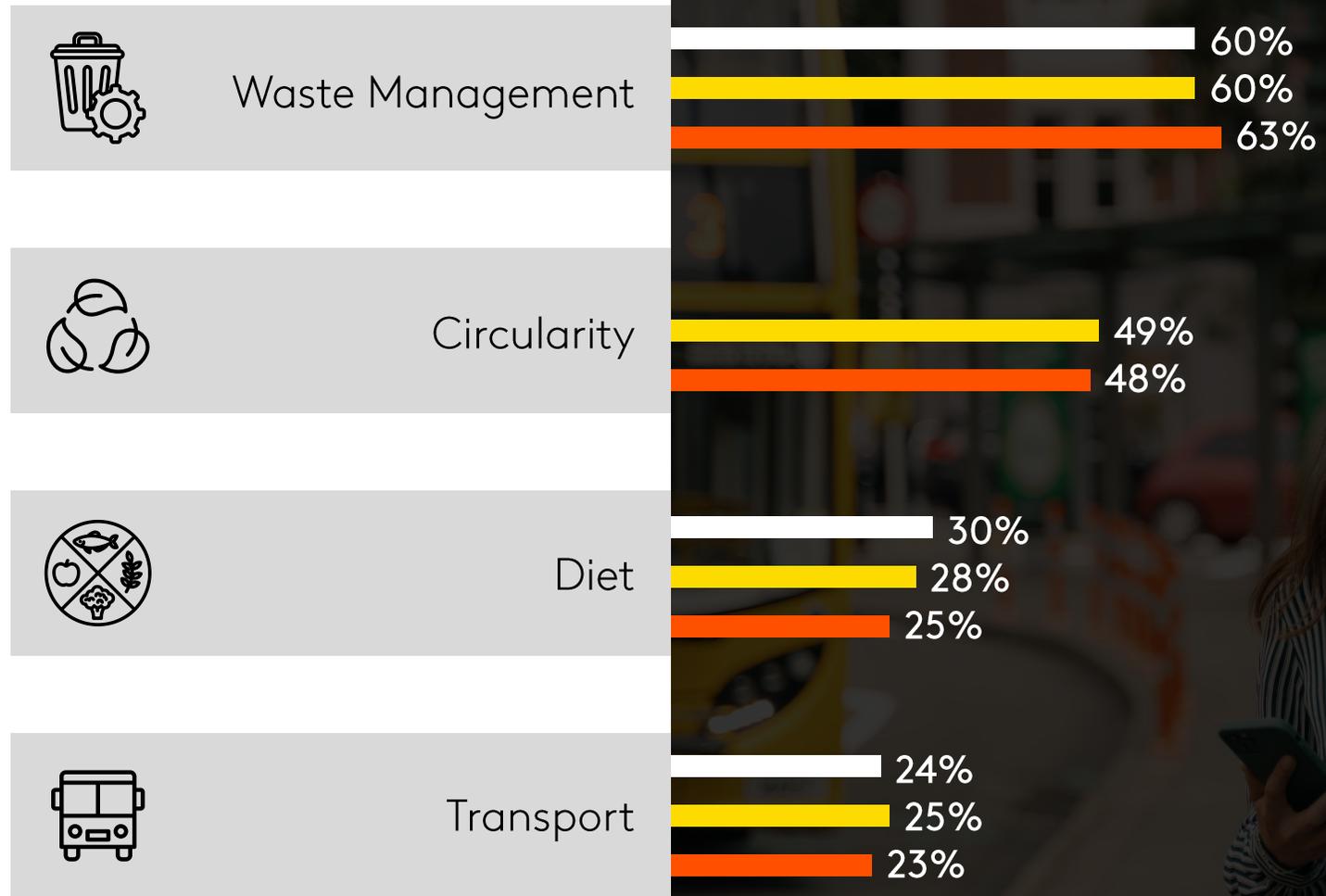
## TOP 5 ENVIRONMENTAL CONCERNS



# Yet in the midst of all of this, New Zealanders have held steady in many of their attitudes...



...in many key behaviours...

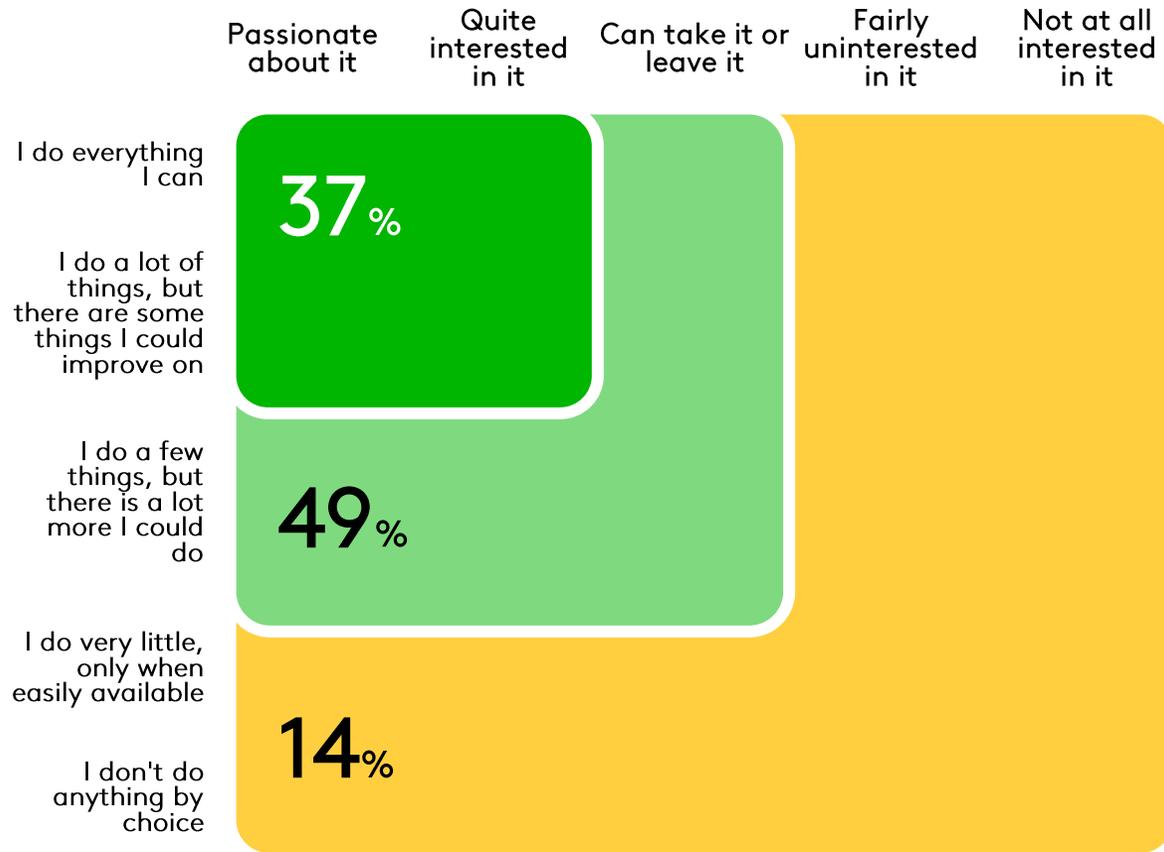


Q: When you have the opportunity, how often do you personally ...  
Base: 374

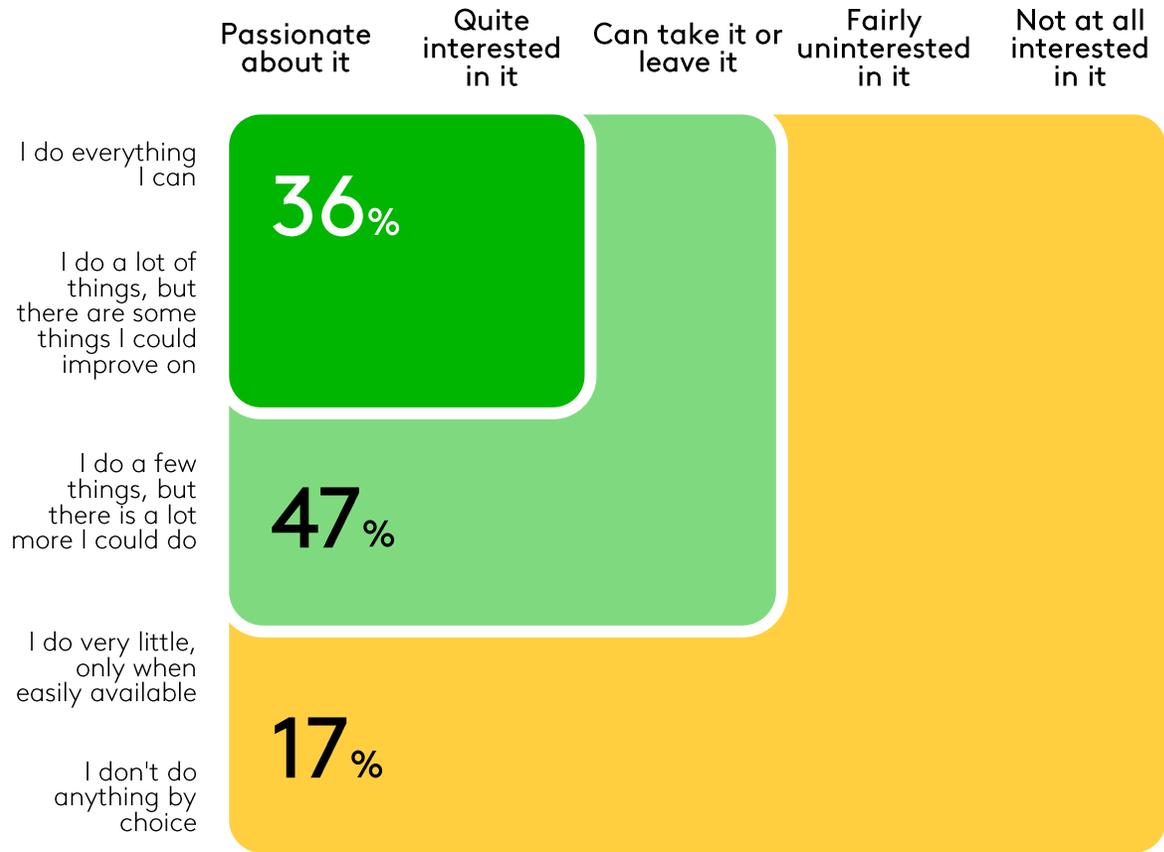
2023 2024 2025

# And by comparing with last year, we can see minimal change in New Zealander's commitment – both emotional and behavioural

## ENVIRONMENTAL COMMITMENT 2024



## ENVIRONMENTAL COMMITMENT 2025



# However, as consumers are under pressure, their belief in the responsibilities of business remains high

Businesses should take responsibility for their environmental/social impact



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



I worry businesses are involved in social/environmental issues just for commercial reasons



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



It is important to me that my employer is environmentally/socially responsible



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



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02

Environmental &  
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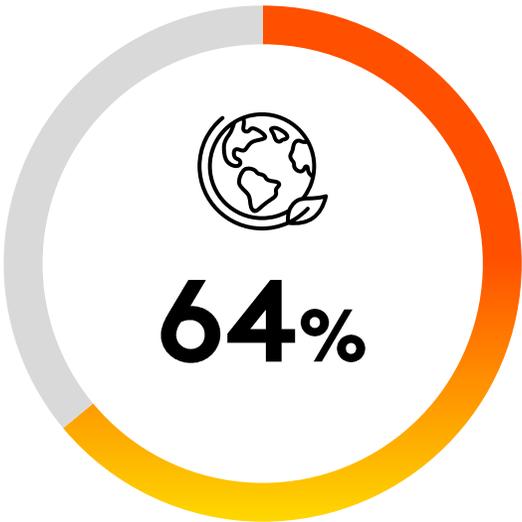




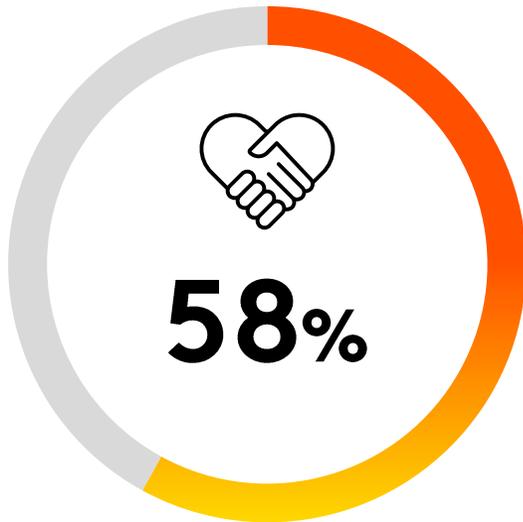
# In terms of attitudes, New Zealanders are slightly less committed to social than environmental sustainability

## ATTITUDINAL COMMITMENT FOR SOCIAL VS ENVIRONMENTAL SUSTAINABILITY

% of New Zealanders who are passionate and interested in ...



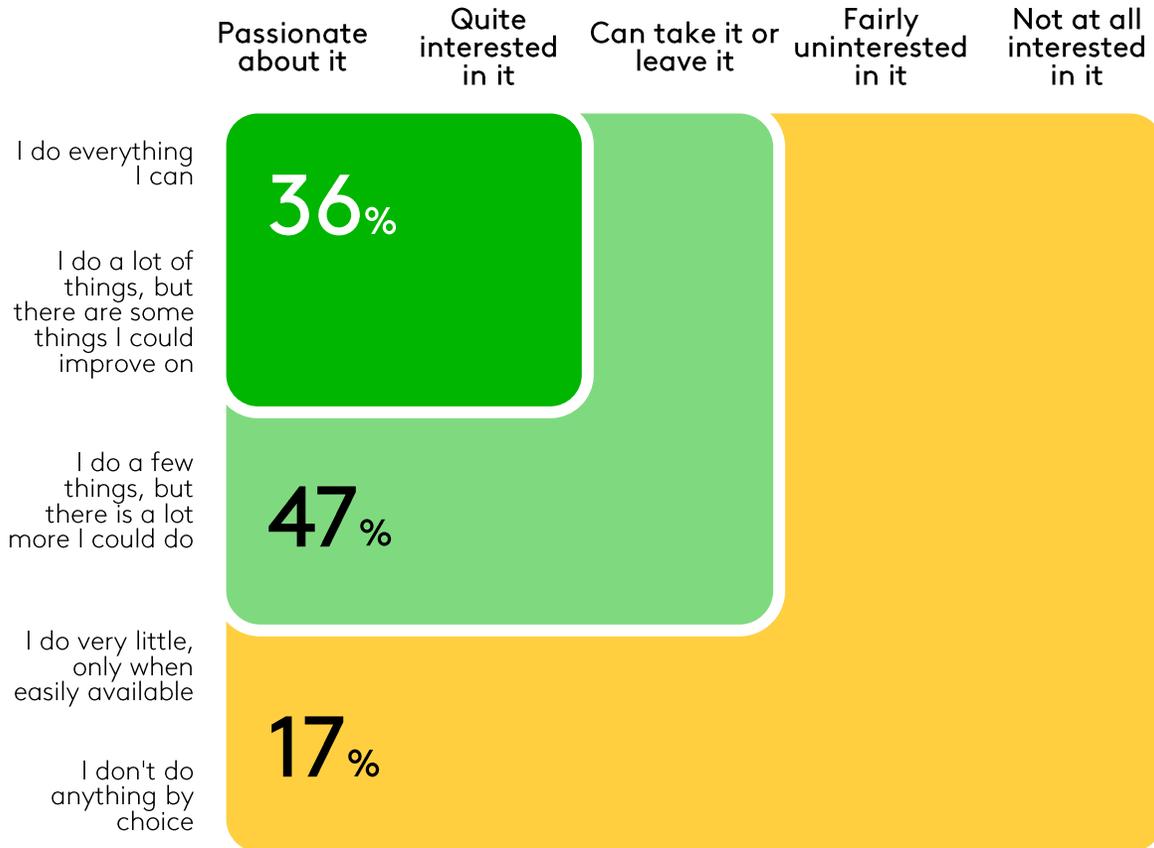
Environmental Sustainability



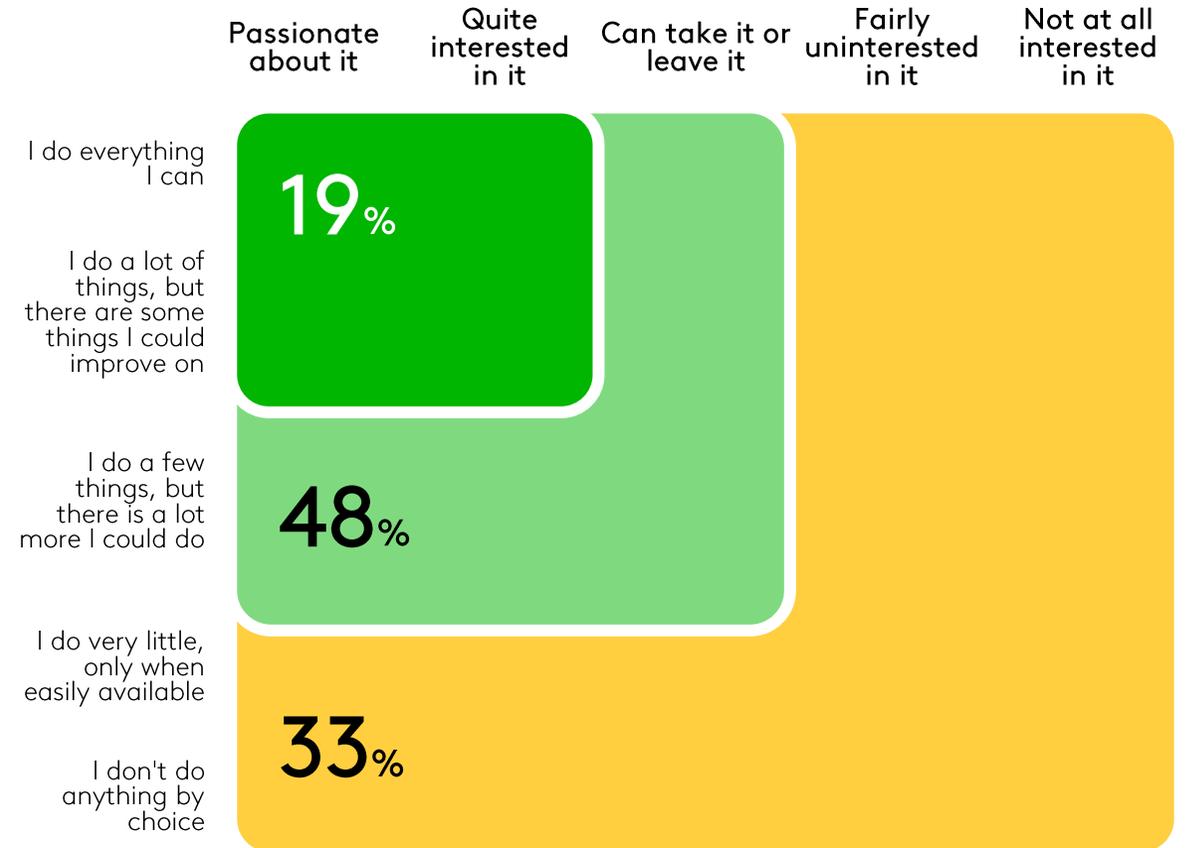
Social Sustainability

# And when we take into account our behaviours that gap becomes even larger; we have twice as many enviro-committed as social-committed in their own lives

## ENVIRONMENTAL SUSTAINABILITY COMMITMENT



## SOCIAL SUSTAINABILITY COMMITMENT



# What consumers expect from businesses appears compensatory for what is missing in their lives

Consumers are more committed – both psychologically and behaviourally – to environmental sustainability...

**...however social is having a larger impact upon how we assess businesses**

So currently we judge businesses more by their social behaviour, than by their environmental behaviour because these are issues important to consumers which are not being acted upon in their own lives

## IMPACT ON SUPPORTING THE HEALTH OF PEOPLE AND PLANET

Total

Minimises the **social** harm of its products / services

28%

Minimises the **environmental** harm of its products / services

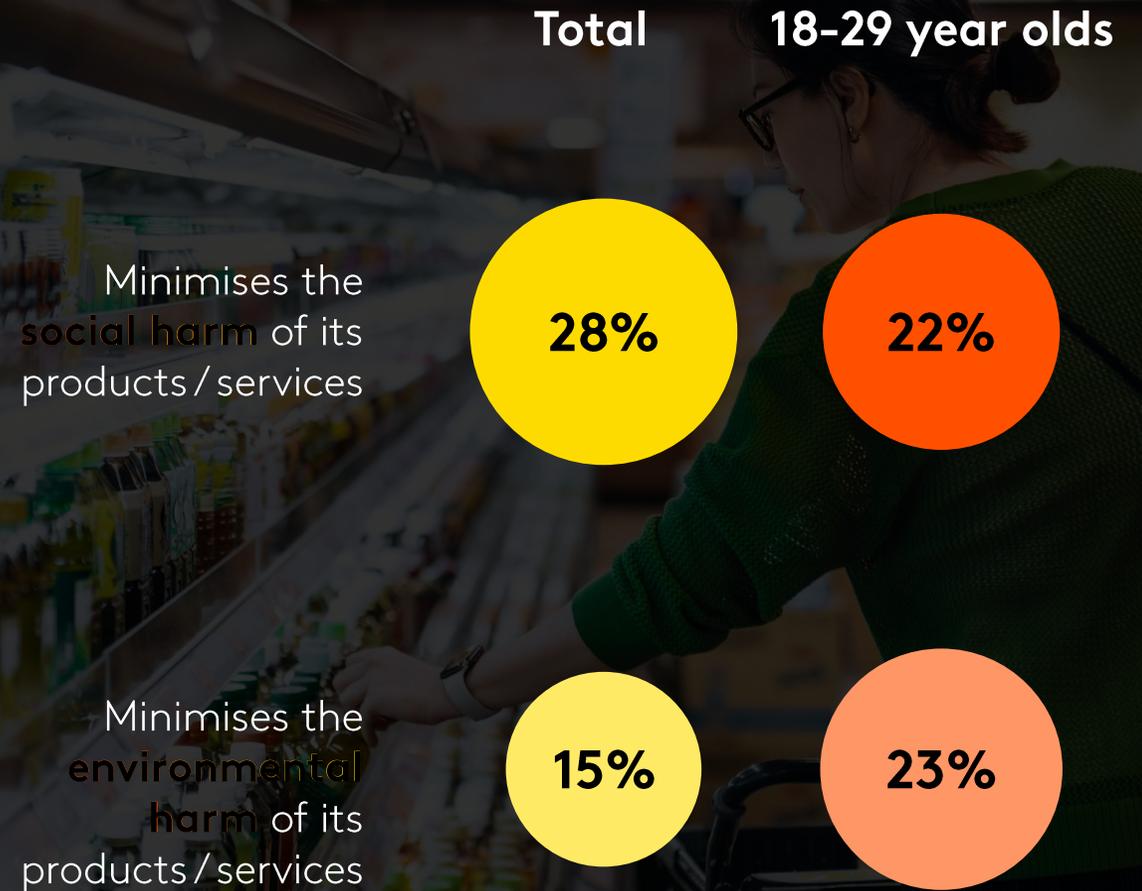
15%

## Our 18-29s however are clearly looking at both your environmental AND social impact

Our youngest cohort of New Zealanders – the ones with the longest future and largest risk in front of them – allocate an equal weight towards both environmental and social responsibility when assessing a businesses performance

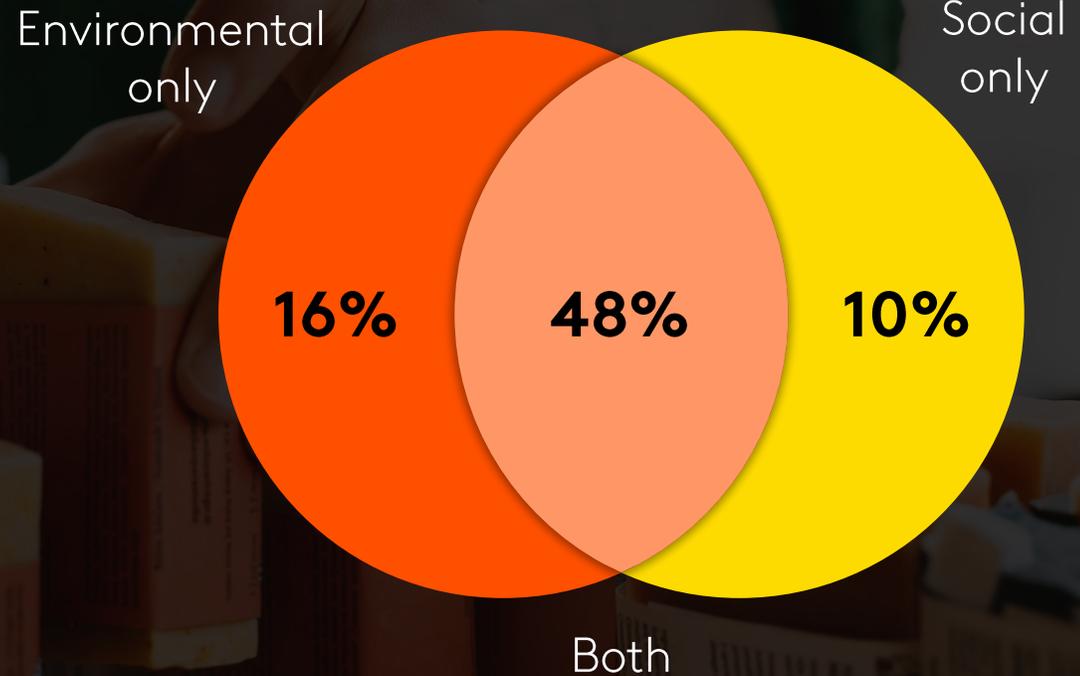
The future commercial implications of this are significant

### IMPACT ON SUPPORTING THE HEALTH OF PEOPLE AND PLANET



The commercial incentive is there to meaningfully act upon both your environmental and social impact - but you have to be authentic to your brand

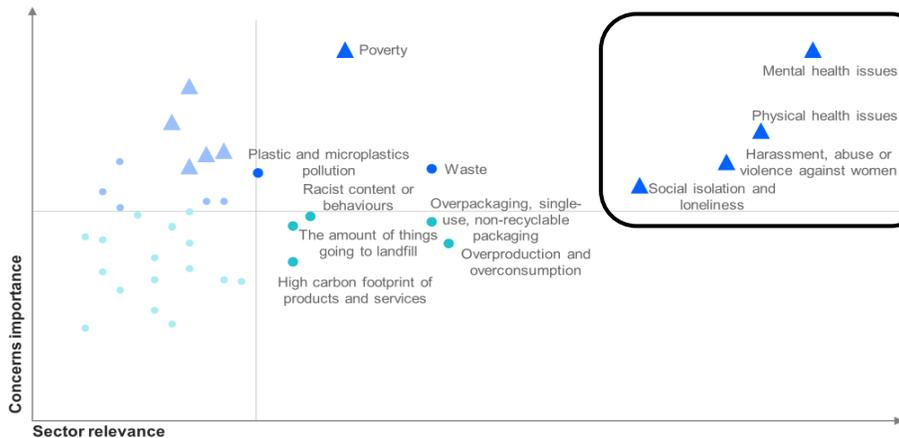
% of New Zealanders who are highly engaged



# Authenticity is key, as aligning your chosen cause with what is not natural within your category can hinder the acceptability of a message

The craft brewer BrewDog says it launched a repackaged Pink IPA to **highlight gender pay inequality** – with a pledge to sell it a fifth cheaper in its bars to reflect the 18.1% average gender pay gap

## BEER, WINE, ALCOHOLIC BEVERAGES



Mental health

Physical health

Harassment, abuse or violence against women

Social isolation



We've created a beer for girls. And it's pink. Because women only like pink and glitter, right?

#Sarcasm

Lets show that enough is enough with stereotypes.





# Supporting real change among consumers however also requires helping them change their behaviours



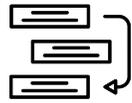
	Passionate about it	Quite interested in it	Can take it or leave it	Fairly uninterested in it	Not at all interested in it	
	10%	54%	27%	7%	2%	
I do everything I can	7%	3%	4%	1%		
I do a lot of things, but there are some things I could improve on	32%	6%	23%	4%		
I do a few things, but there is a lot more I could do	45%	1%	25%	16%	3%	
I do very little, only when easily available	14%	1%	2%	7%	3%	1%
I don't do anything by choice	2%			1%	1%	

Q: What is the strength of your feelings towards your commitment to living a sustainable lifestyle?  
 Q: How would you best describe how sustainable your lifestyle actually is in practice?  
 Base: 1010

## The reasons why consumers don't do more is consistent across both environmental and social



I don't have enough money



I have other things that take priority right now



I'm doubtful if what I do would really make a difference



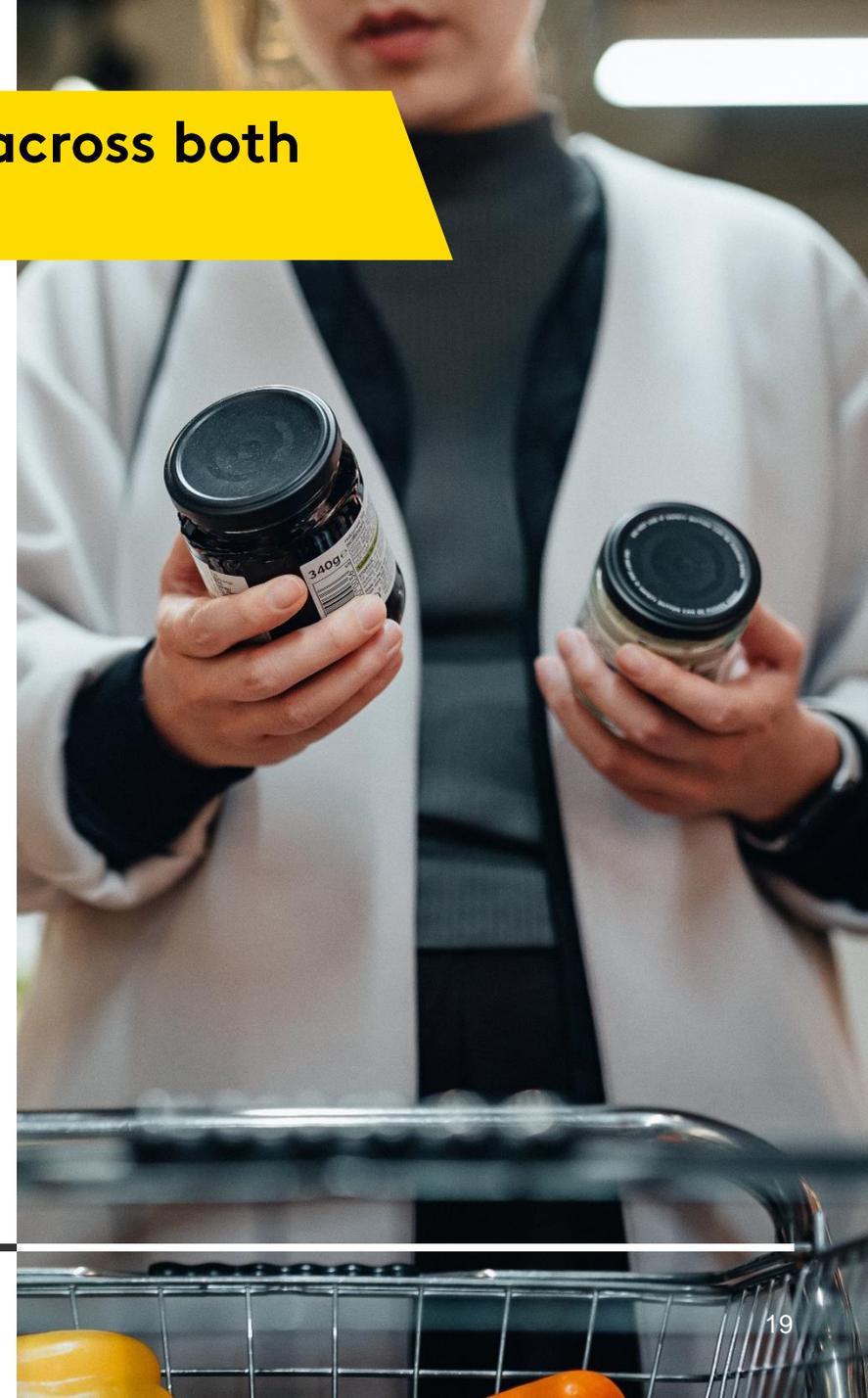
I'm not sure what I can do to help



I don't have enough time, or the right skills



I don't know enough about these issues



# Different behavioural levers are proven to help consumers overcome these barriers

To become a new habit or ritual, make it...



## Easy

Remove the FRICTIONS:

- Situational factors
- Effort
- Limiting beliefs
- Availability



## Meaningful

Motivate to FUEL the change:

- Deliver a superior benefit
- Align to beliefs and values
- Socially desirable
- Build positive associations with the brand



## Rewarding

To cement the new behaviour:

- Deliver on the promise
- Reinforce the behaviour



# Impact, trust and easy information have a primary role to play in overcoming the barriers among NZ consumers



**Easy**  
Remove the frictions



**Meaningful**  
Fuel the change



**Rewarding**  
Cement the new behaviour

Improve the costs vs. the benefits of that purchase **55%**

Show me that my actions will make a positive difference **49%**

Make it easier to collect all of the information I need to make better choices **43%**

Show me that the businesses behind these offers are more trustworthy **40%**

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# 03

## Perceptions of NZ Businesses

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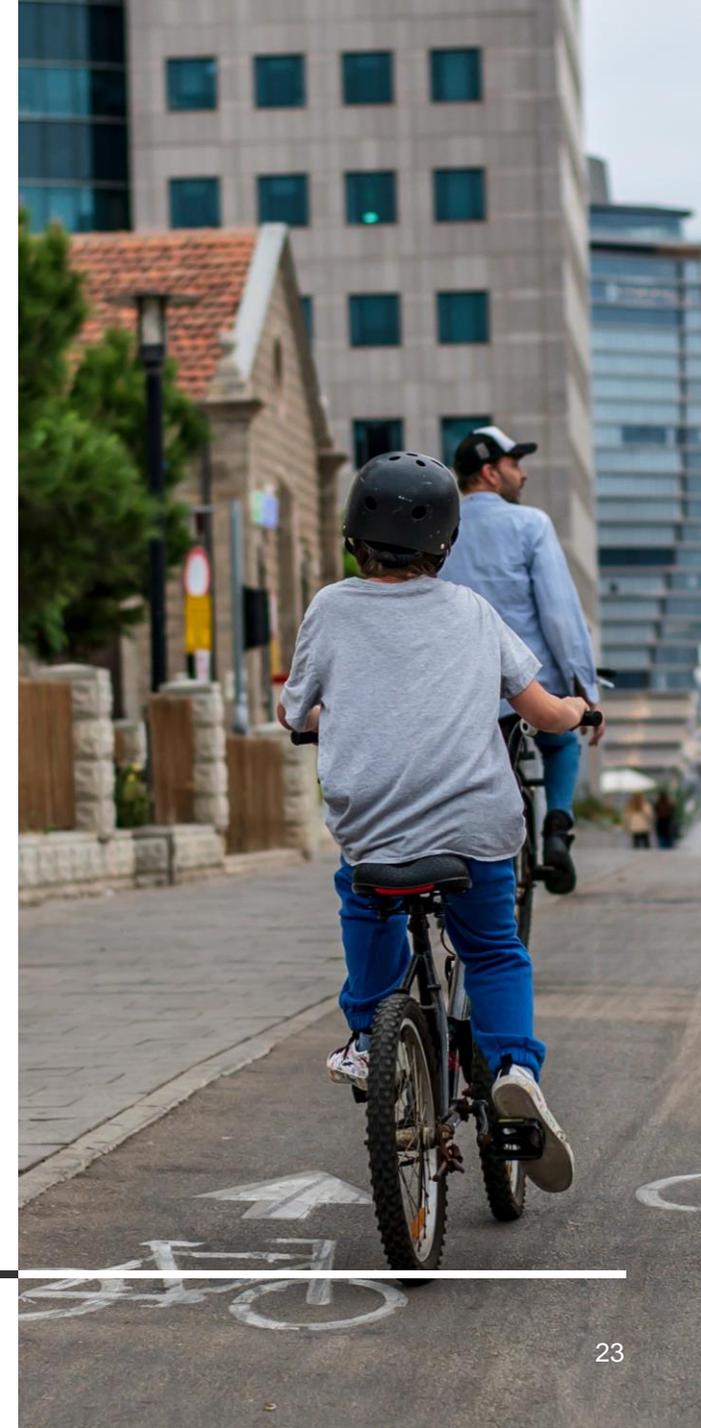


Global  
Network



# Again in 2025, we have investigated perceptions of 20 major New Zealand brands/businesses on ten different criteria to understand which of these are having the greatest impact on overall consumer perceptions



**In addition to social over environmental performance in driving perceptions of New Zealand businesses, actively speaking up and being transparent are far more impactful than communicating the good things that you do**

**IMPACT ON SUPPORTING THE HEALTH OF PEOPLE AND PLANET**



Minimises the social harm of its products/services	<b>28%</b>
Minimises the environmental harm of its products/services	<b>15%</b>
Actively speaks up on issues relating to the environment and/or society	<b>12%</b>
Is transparent on their sustainability performance	<b>11%</b>
Treat their employees fairly & with respect	<b>10%</b>
Gives back and supports where it matters	<b>9%</b>
Aligns with me and my values	<b>9%</b>
Represents people similar to me or my community	<b>6%</b>
Responsibly manages what they buy and who they buy it from	<b>NCI</b>
Communicates the good things that they do	<b>NCI</b>

Q: Please think about [BRAND], what they sell, what they communicate and how they operate. Based on what you have seen, heard, or experienced, how much would you agree or disagree with the following ...

Q: Considering all the questions you have just answered, overall, how would you rate [BRAND] in terms of supporting the health of people and planet?

Base: 1010

\*NCI = No current impact

# The 48% who are both environmentally and socially committed are a lot less driven by employee treatment but more driven by 'aligns with me and my values'

## IMPACT (RANK) ON SUPPORTING THE HEALTH OF PEOPLE AND PLANET AMONG CONSCIOUS NEW ZEALANDERS

	Total	Conscious Consumers
Minimises the social harm of its products/services	28% (1)	34% (1)
Minimises the environmental harm of its products/services	15% (2)	22% (2)
Treat their employees fairly and with respect	10% (5)	2% (8)
Aligns with me and my values	9% (6)	17% (3)



# In comparison, 18-29 year olds are much more impacted by employee treatment – in fact it is the leading driver determining how they view your brand

## IMPACT (RANK) ON SUPPORTING THE HEALTH OF PEOPLE AND PLANET AMONG NEW ZEALANDERS

	Total	18 – 29 year olds
Minimises the social harm of its products/services	28% (1)	22% (3)
Minimises the environmental harm of its products/services	15% (2)	23% (2)
Actively speaks up on issues relating to the environment and/or society	12% (3)	NCI
Treat their employees fairly and with respect	10% (5)	31% (1)



# The next age cohort however – 30-44 – is not at all impacted by employee treatment, while actively speaking up shows a significant change in impact

## IMPACT (RANK) ON SUPPORTING THE HEALTH OF PEOPLE AND PLANET AMONG NEW ZEALANDERS

	Total	18–29 year olds	30–44 year olds
Minimises the social harm of its products/services	28% (1)	22% (3)	25% (1)
Minimises the environmental harm of its products/services	15% (2)	23% (2)	8% (7)
Actively speaks up on issues relating to the environment and/or society	12% (3)	NCI	23% (2)
Treat their employees fairly and with respect	10% (5)	31% (1)	NCI



# Among those struggling financially 'treat their employees with respect' is far more important to them

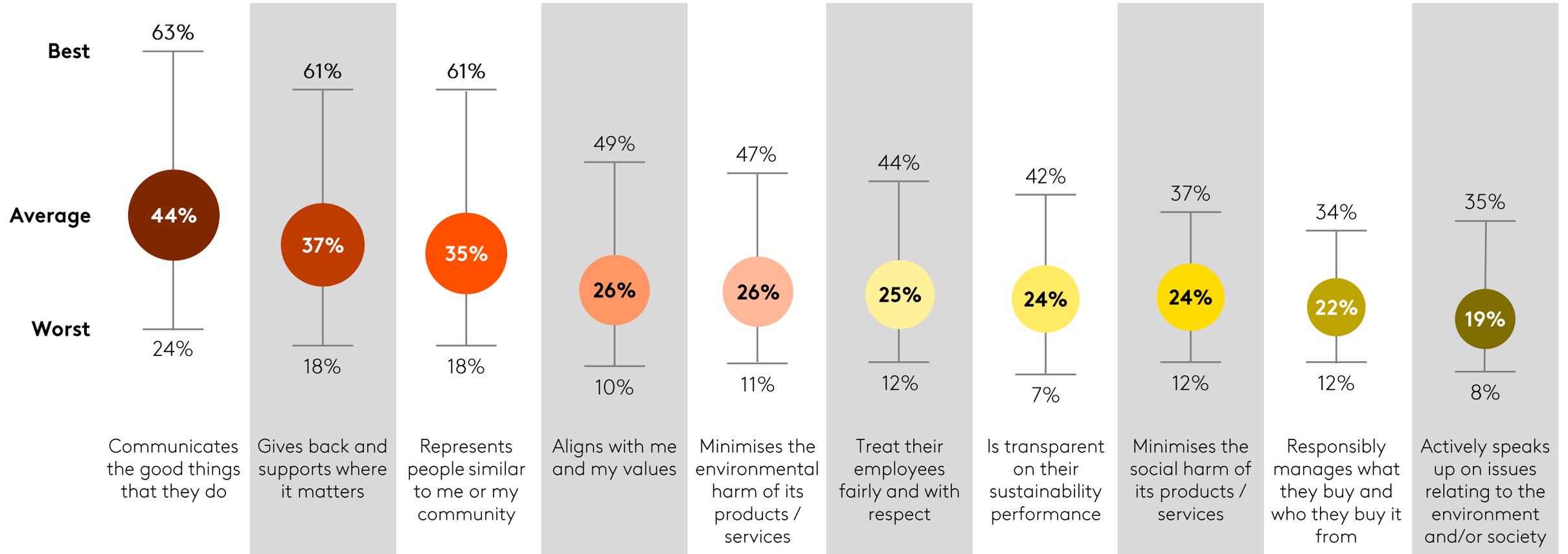
## IMPACT (RANK) ON SUPPORTING THE HEALTH OF PEOPLE AND PLANET AMONG FINANCIALLY STRUGGLING NEW ZEALANDERS

	Total	Struggling financially
Minimises the social harm of its products/services	28% (1)	26% (2)
Minimises the environmental harm of its products/services	15% (2)	10% (3)
Treat their employees fairly and with respect	10% (5)	27% (1)

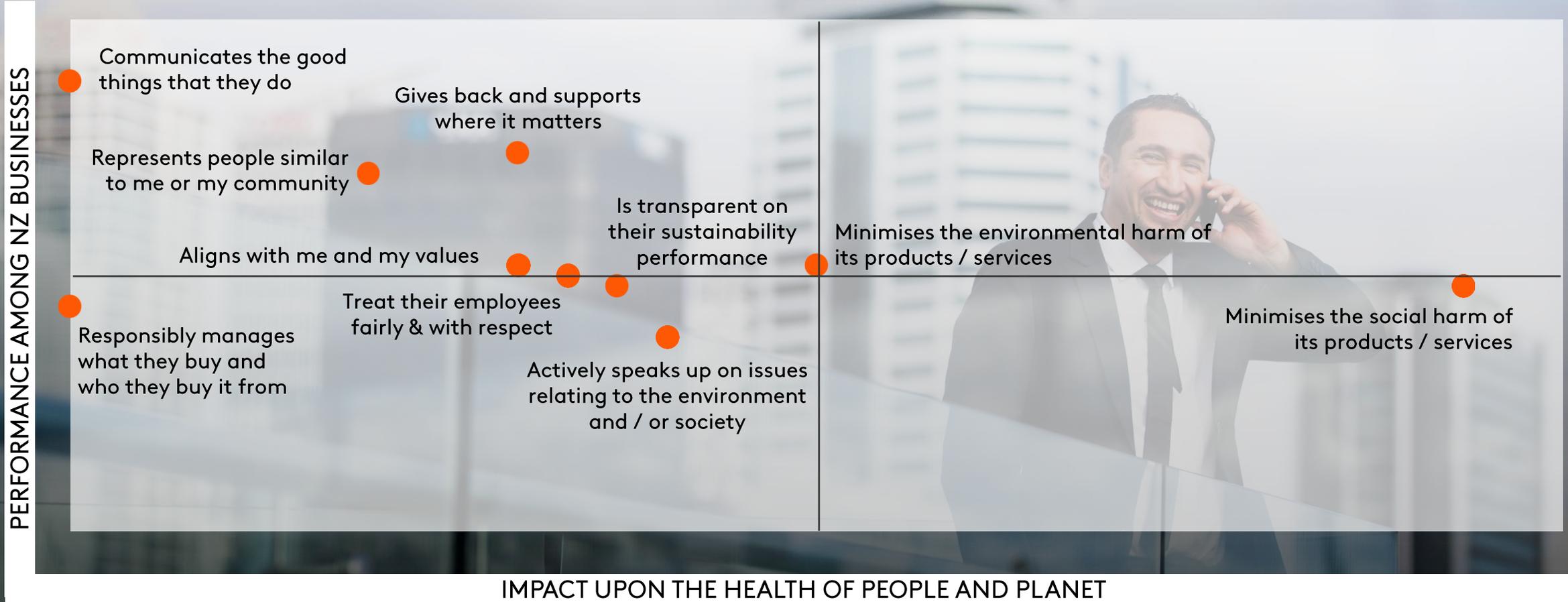


# New Zealand businesses perform modestly overall, with even the best performing brands only reaching 60% agreement

## % AGREE THAT BUSINESSES ARE PERFORMING



# To improve performance on these issues, New Zealand brands should focus on minimising social and/or environmental harm and having an active voice on these issues



## In summary...

As New Zealand businesses and brands, listen to the expectations of New Zealand consumers who (still) expect you to...



Help them manage the cost of living



Display meaningful contributions to social impact issues relevant to your business



Continue to act meaningfully in relation to carbon emissions, nature impact and waste management where relevant to your business

In summary...



As New Zealand businesses and brands, listen to the expectations of New Zealand consumers who (still) expect you to...



Help consumers overcome the barriers they have to adopting new 'better' behaviours—show them how, make it easy, inform them and show them the impact that action is having



Firstly, actively speak up on priority issues, and then secondly tell your broader brand sustainability story in a trustworthy and straightforward manner



Consider the role of employee treatment in your voice to consumers

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# BETTER FUTURES

2025

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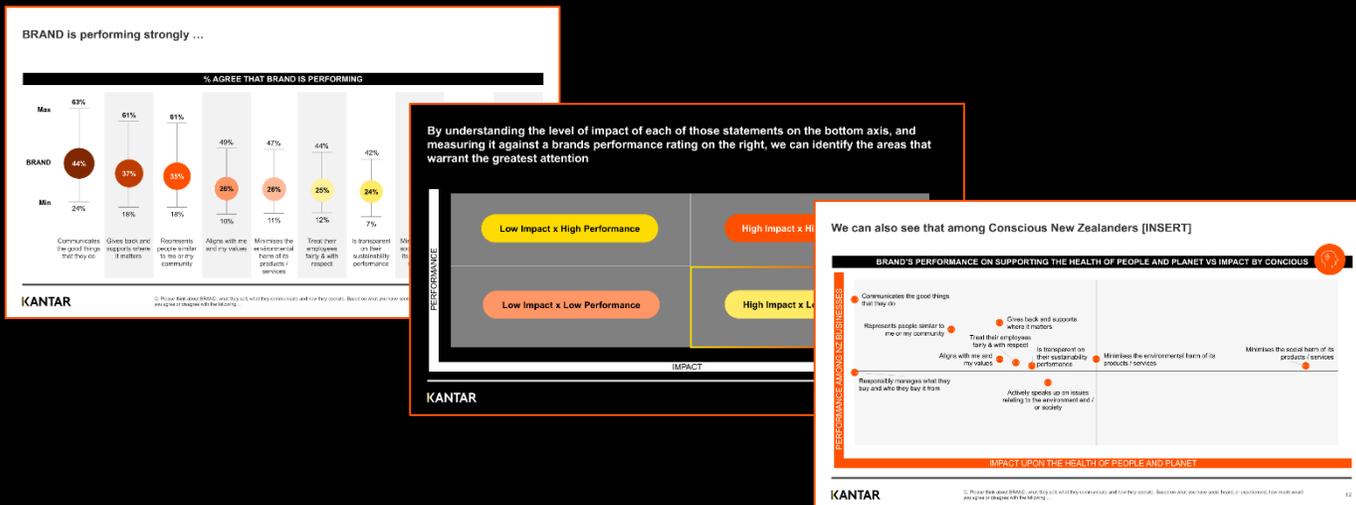
# Better Futures Brand Reports

For any of the 20 businesses we investigated in Better Futures, individual deep-dive reports detailing your performance and providing recommendations to drive your business and brand's Environmental and Social sustainability can be prepared.

This report will include an understanding of your business' performance on the features that matter:

- The key issues driving perceptions of your sustainability credentials
- The key issues driving sustainability perceptions in your category (global)
- How New Zealand consumers perceive your business on those drivers
- Analysis by statement and consumer group

Your performance will be presented relative to the average of 20 NZ brands.



AA Insurance	AIR NEW ZEALAND
bnz	Coca-Cola
CHORUS	dbreweries
Fonterra Dairy for life	LION
Meridian.	MITRE 10
MCDONALD'S	NEW WORLD
SILVER FERN FARMS	Southern Cross Health Society
Spark <sup>nz</sup>	TOYOTA
UNIVERSITY OF AUCKLAND Waipapa Taumata Rau NEW ZEALAND	THE WAREHOUSE GROUP
Woolworths	ENERGY

