

BETTER FUTURES



*Celebrating a decade of
tracking New Zealanders'
attitudes & behaviours
around sustainability*



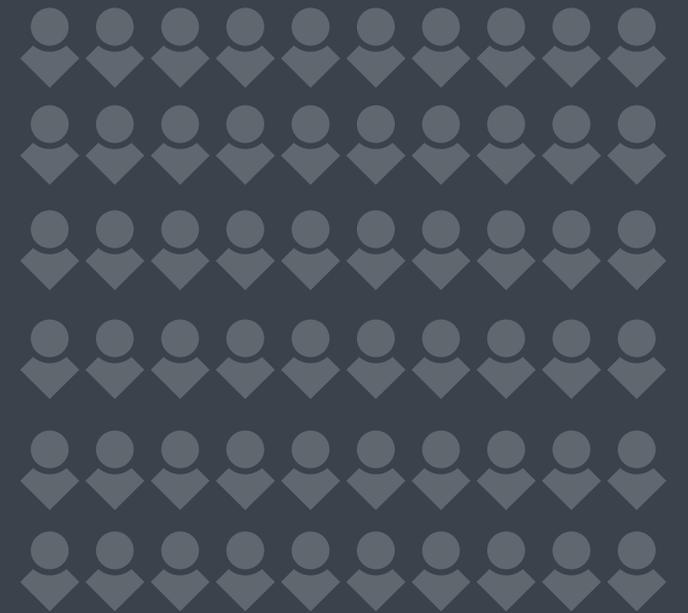
In 2018 we spoke to....

1,000 NZers online

18+ years

BETWEEN 4 AND 11 DECEMBER 2018

A total of **16,600** people over 10 years



RECAPPING • 2017 • HIGHLIGHTS

**INCREASED
AWARENESS OF THE**

**SUSTAINABLE
DEVELOPMENT
GOALS**

Increased
'high commitment'
to a sustainable
lifestyle

HOT TOPICS IDENTIFIED

PLASTIC

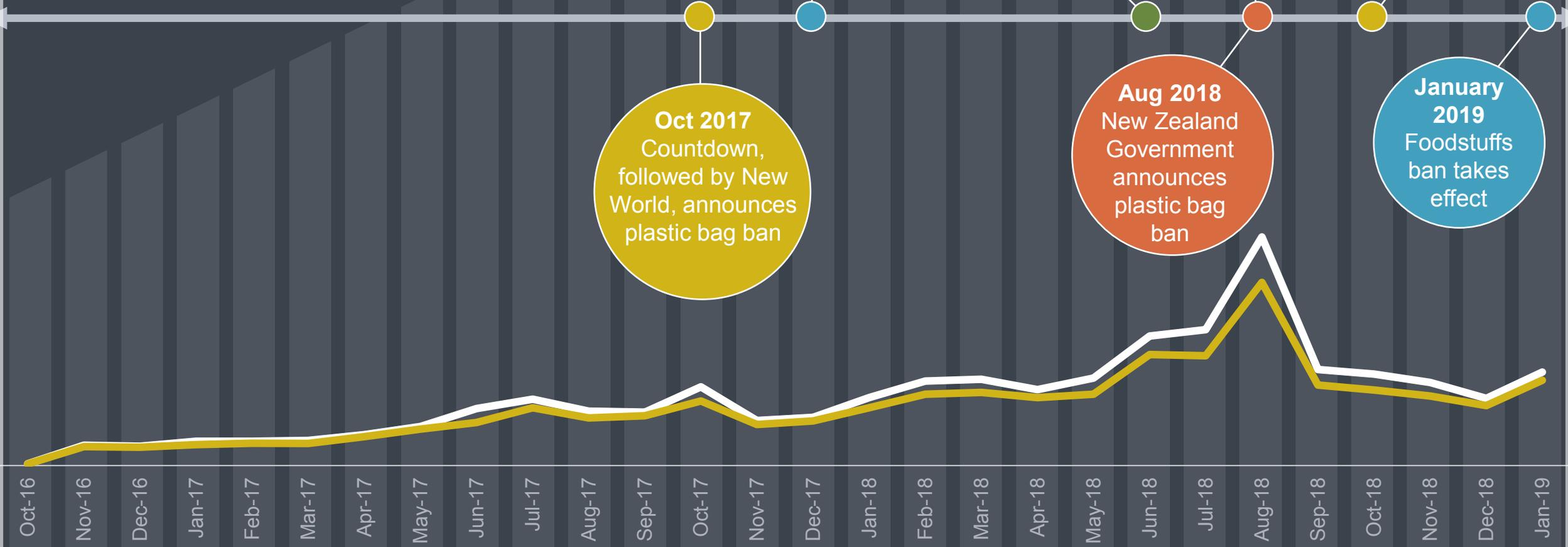
WATER

CLIMATE
CHANGE

The worldwide trend on plastic concern extended to New Zealand. The Government's announcement of a plastic bag ban generated significant social media engagement.



2018 MEDIA ACTIVITY ON PLASTIC



Oct 2017
Countdown,
followed by New
World, announces
plastic bag ban

Dec 2017
Government
announces ban
on microbeads

Jun 2018
Microbead ban
takes effect

Aug 2018
Foodstuffs
announces
plastic bag
ban

Oct 2018
Countdown
plastic bag ban
fully implemented
across all
stores

Aug 2018
New Zealand
Government
announces
plastic bag
ban

**January
2019**
Foodstuffs
ban takes
effect

Source: Netbase,
Date Range: 10/30/16 - 01/30/19

— Mentions — Posts

2018 initiatives
on water signal a
commitment to
transparency by
government
and corporates



Welcome to Safeswim
Nau mai ki Safeswim

Check Safeswim for live information on water quality and swimming conditions at your favourite swimming spots

Find a beach - Kites he taone

Search

Stay safe at the beach
Noho haumarū

- Choose a lifeguarded beach and swim between the flags
- Ask a lifeguard for advice
- Don't overestimate your ability
- Keep young children within arm's reach at all times
- Watch out for rip currents; they can carry you away from shore
- Never swim or surf alone
- When fishing from rocks, always wear a lifejacket
- If in doubt, stay out!
- If you see someone in trouble, call 111 and ask for Police
- Be sun smart - Slip, Slop, Slap and Wrap

© Auckland Council



There is growing momentum around climate change action



Let's look at the
issues NZers care
most deeply
about now



The headline issue for
New Zealanders is...

Plastic waste

72%

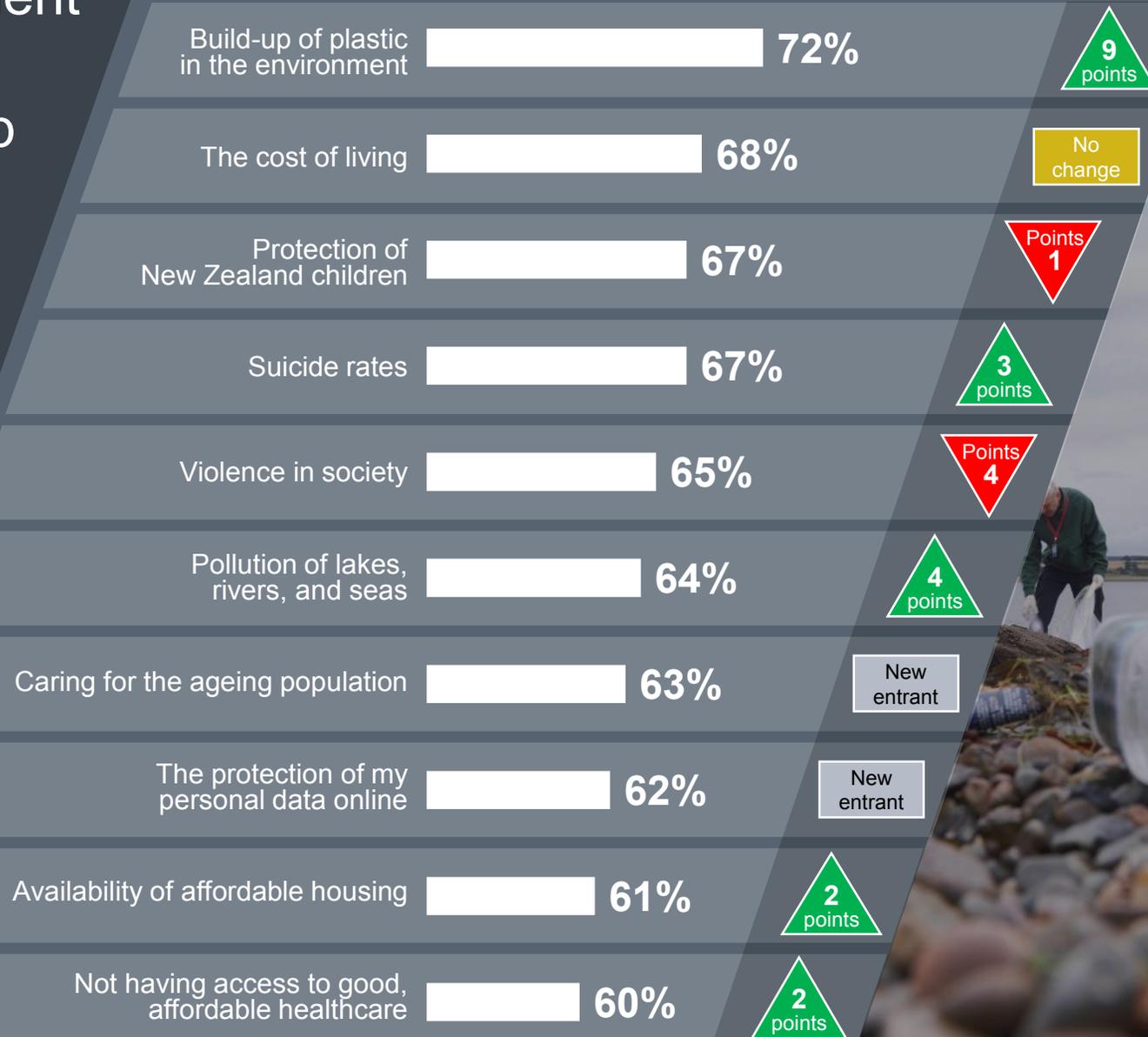
are concerned

“

“I’m noticing a general change in people’s attitudes and practices towards reusable materials like containers or straws or gladwrap.”

“It’s a lot more visible ... things like how we need to do something fast to save our environment, especially when it comes to plastic.”

Beyond the environment and the cost of living we also express deep concern for our most vulnerable

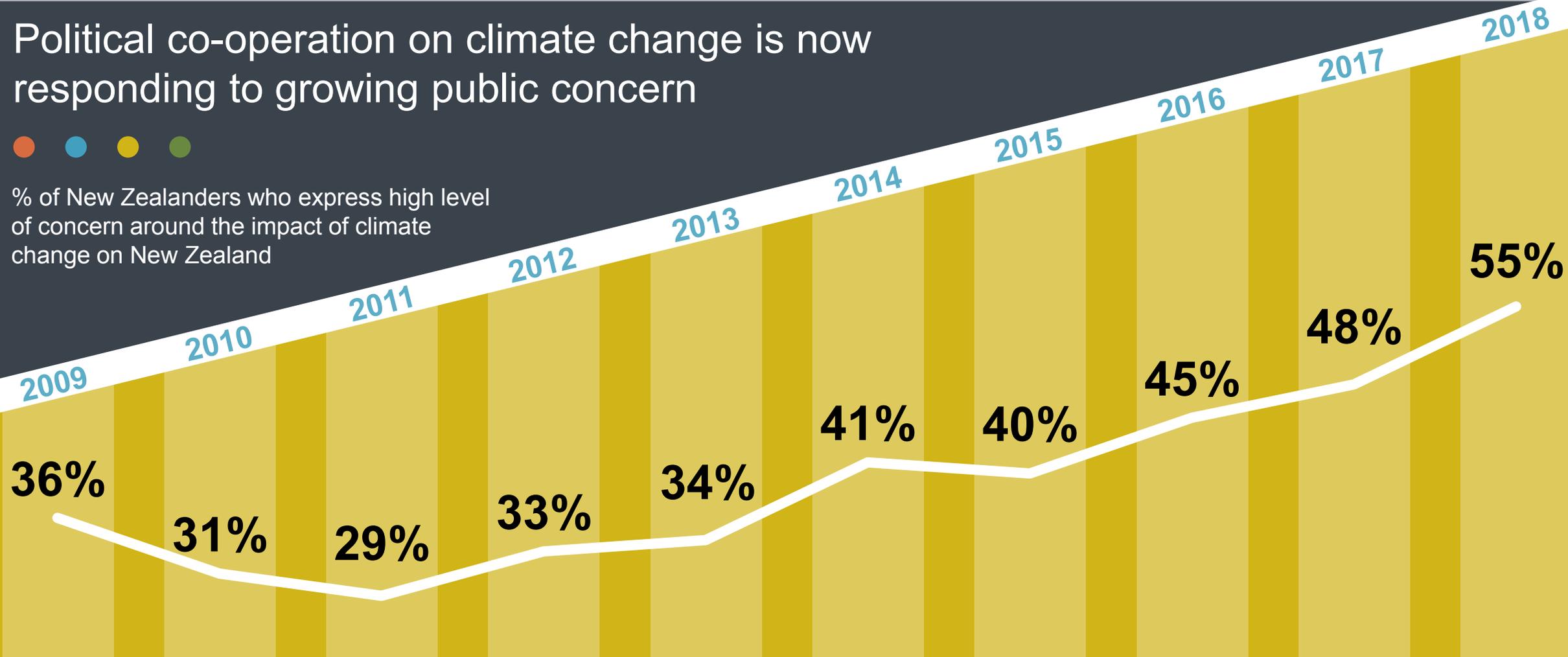


* Asked for first time in 2018

Political co-operation on climate change is now responding to growing public concern



% of New Zealanders who express high level of concern around the impact of climate change on New Zealand



“Ten years ago when I first came into parliament I remember standing at a town hall meeting and speaking passionately about the issue of climate change and being roundly booed, including by, I think, members of my own family.”

Jacinda Ardern,
World Economic Forum

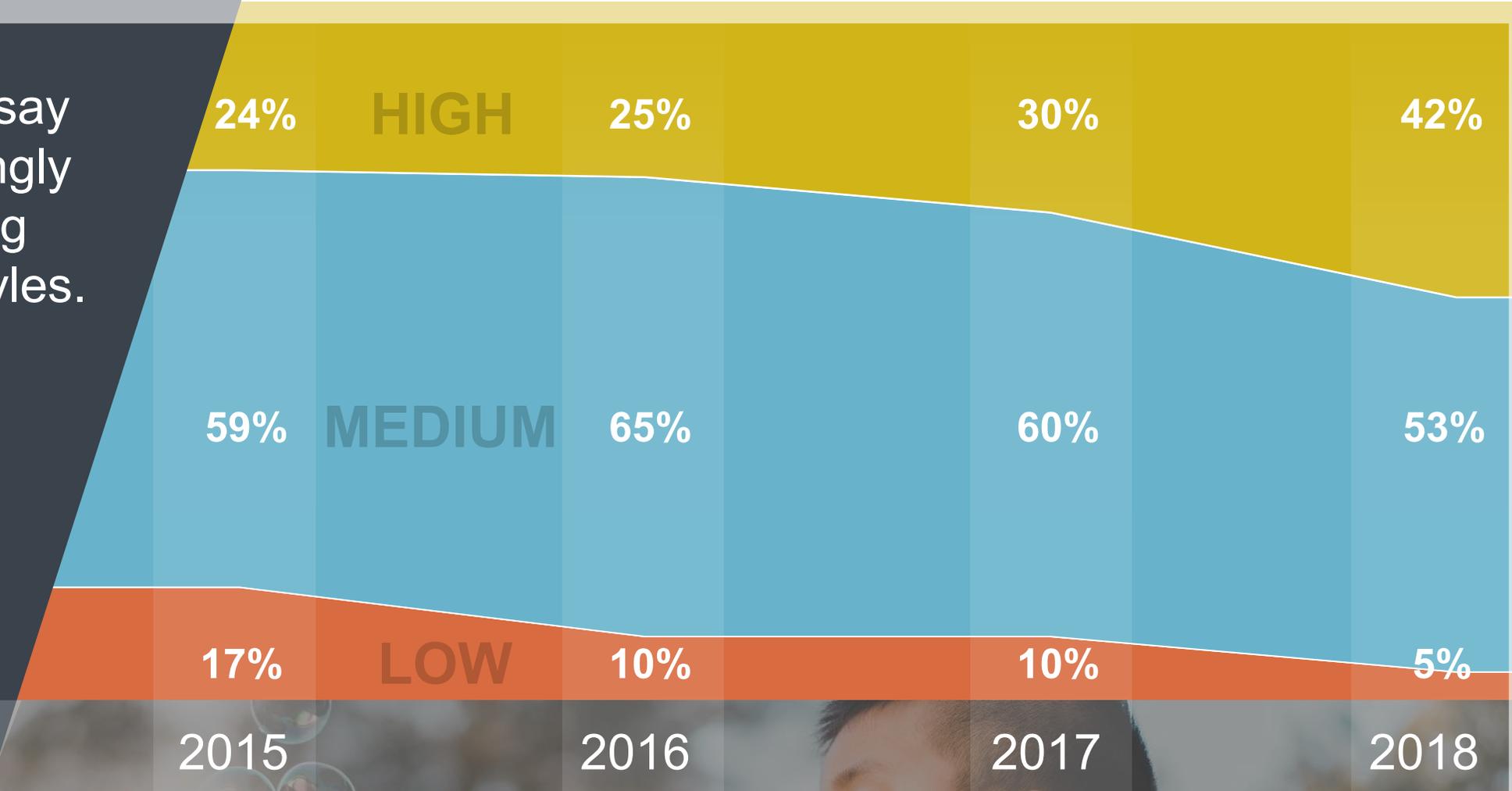
How are we
responding to
the challenges
we face?



New Zealanders say they are increasingly committed to living sustainable lifestyles. Four in ten rate themselves as highly committed



COMMITMENT TO LIVING A SUSTAINABLE LIFESTYLE



Our increased commitment to sustainable lifestyles is reflected in two touchstone behaviours



First...

8 / 10

are ditching plastic bags in favour of reusable ones showing population-level behaviour change is possible



% WHO MOSTLY/ALWAYS USE REUSABLE BAGS

23%

2014

22%

2015

21%

2016

30%

2017

84%

2018



Second...

the trend towards plant based diets is growing with...

1 / 10 going **meat-free**
(mostly)

% WHO ALWAYS / MOSTLY GO MEAT-FREE

4%

2014

5%

2015

6%

2016

7%

2017

10%

2018



“For the average consumer... the takeaway message is change your diet and write to your politicians to implement better regulations.”

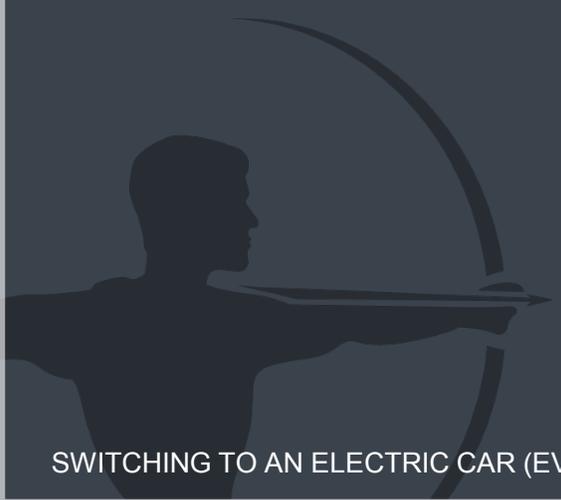
Marco Springman

LEAD AUTHOR OF STUDY INTO
THE IMPACT OF FOOD PRODUCTION

Looking to the future, transport is a critical pathway to a low carbon, better quality of life



However, New Zealanders are not yet fully convinced the electric car is something to aspire to



SWITCHING TO AN ELECTRIC CAR (EV) OR HYBRID

34%

Thinking about switching

22%

Thought about it, but probably won't

27%

Don't want to switch

14%

Haven't thought about switching / don't know



“Innovation comes in many forms and is unpredictable.

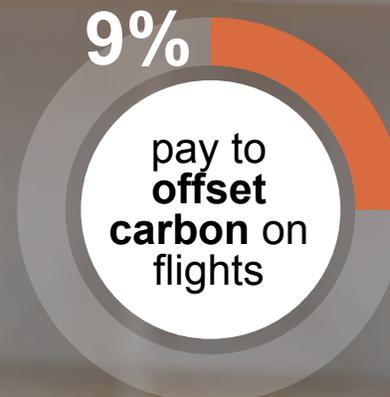
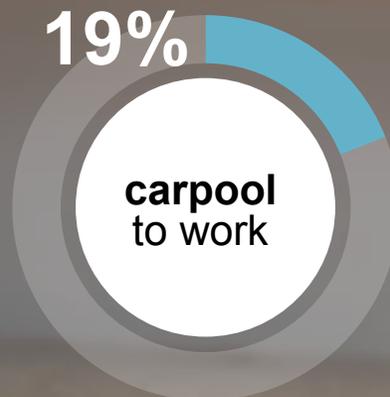
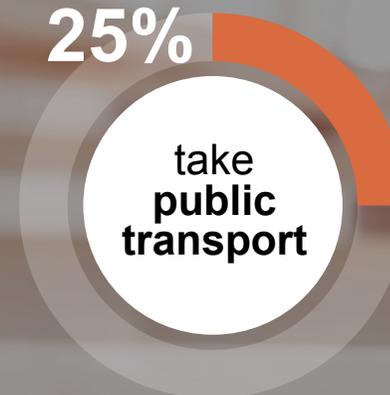
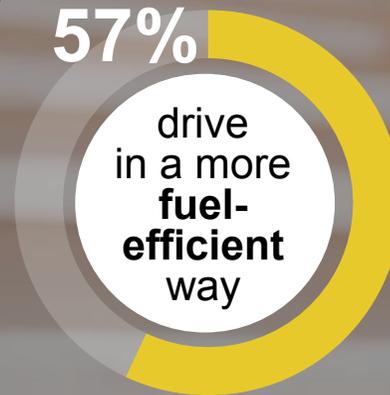
Yet it is the closest thing to a ‘silver bullet’ to enable humanity to meet the challenge of avoiding damaging climate change.”

NZ Productivity Commission Low Emissions Report,

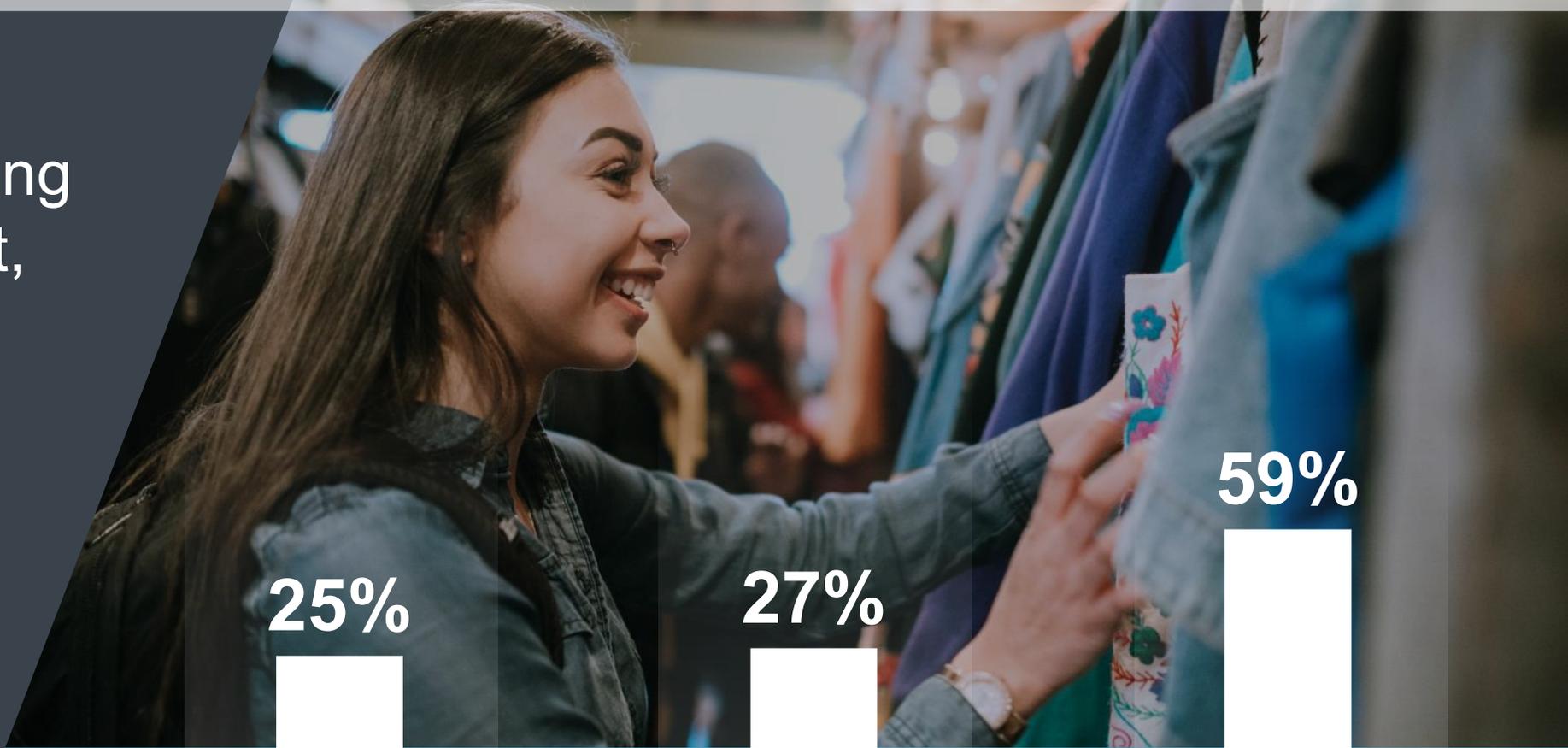
AUGUST 2018



However they embrace accessible options to travel sustainably



There is an enthusiastic sharing economy mindset, although demand appears lower than supply



25%



Buy second-hand rather than new, to avoid buying new stuff



27%



Hire or borrow things to avoid buying new stuff



59%



Dispose of clothing / household items through online community groups



And what do
we expect of
businesses?



New Zealanders increasingly want 'kinder' businesses



By being kind we can protect our customer base and attract talent



86%

AGREE



"It is important for me to work for a company that is socially and environmentally responsible"

90%

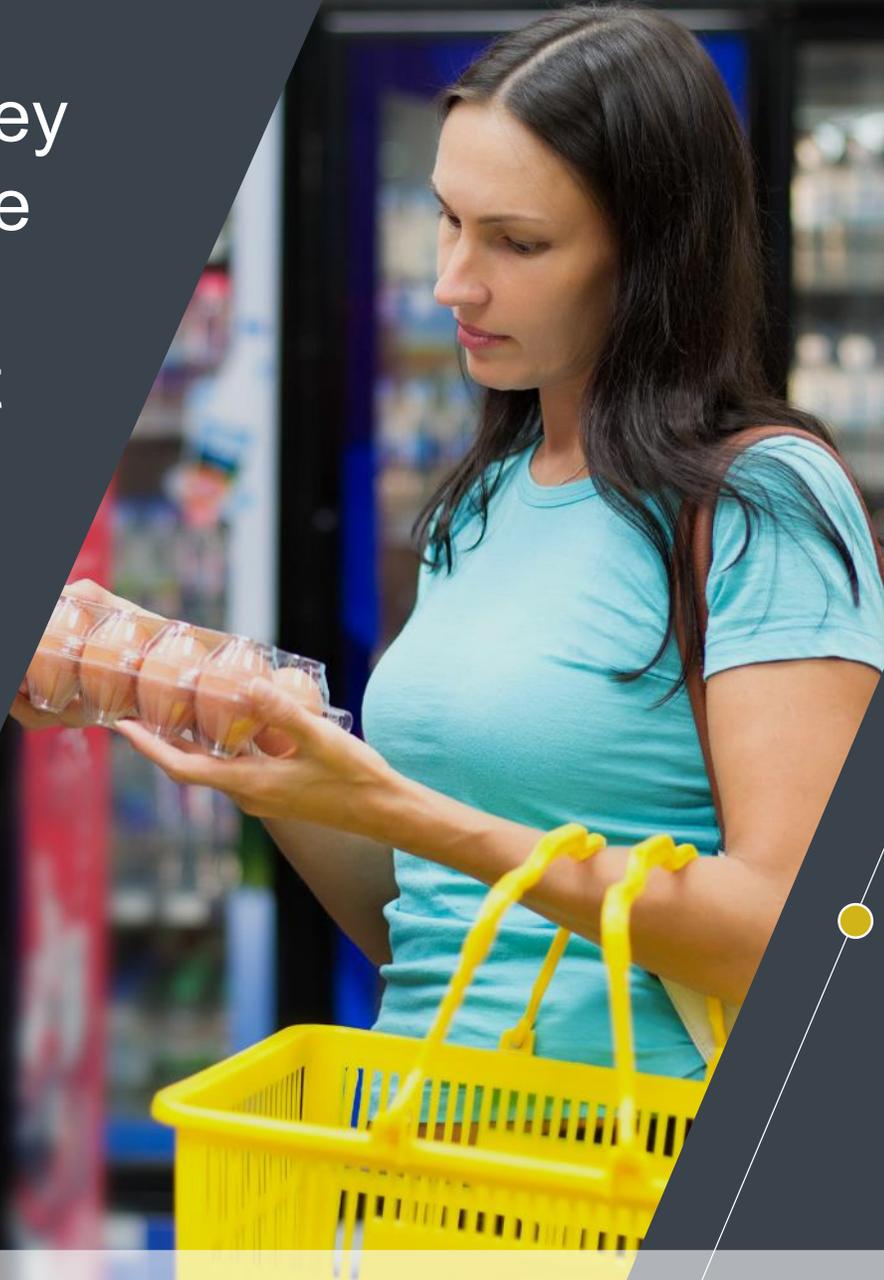
AGREE



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



Ethical consumers
will think again if they
believe brands have
a negative impact
on the environment



“

- *“I stopped using a brand of eggs that were falsely labelled as free range, as well as a brand of laundry detergent that marketed as most environmentally friendly and turned out not to be.”*
- *“If items are wrapped in single use plastic I won't buy it. If the plastic can be recycled I will buy it.”*





THEY ARE ALSO SUSPICIOUS
OF GREENWASHING

“

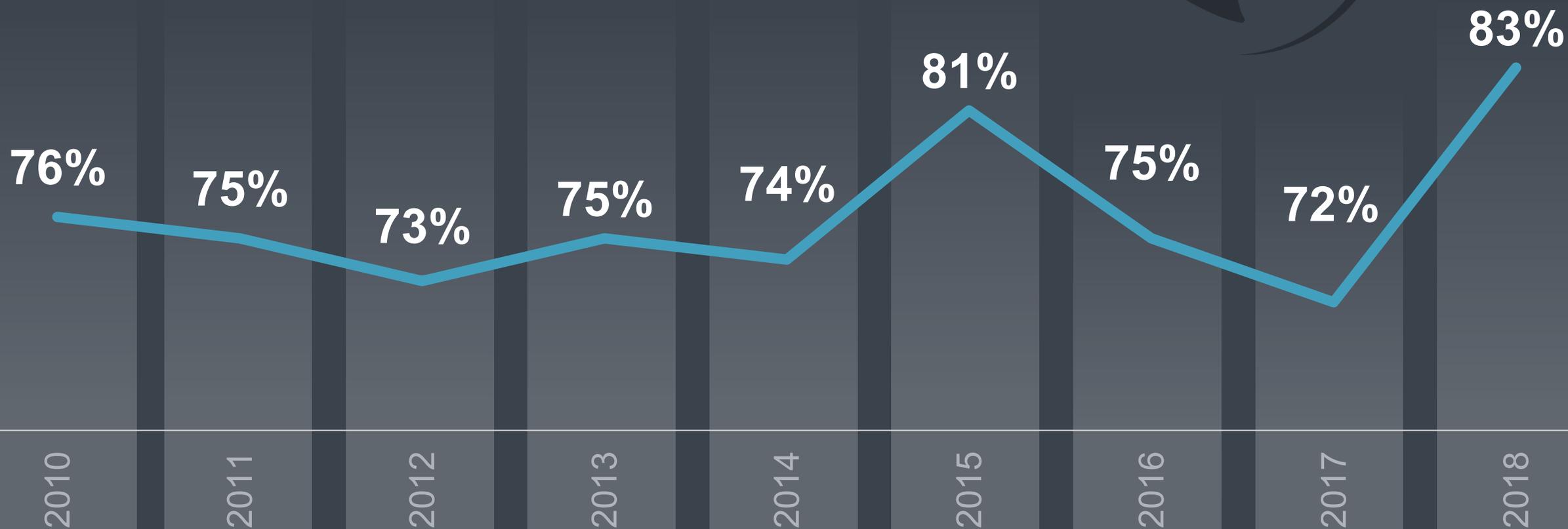
“I read an article about palm oil and the different names that hide it in products, and I have stopped buying multiple products which contain palm oil.”



It's more challenging than ever for business to convince consumers of their credentials



THE WAY BUSINESSES TALK ABOUT THEIR SOCIAL AND ENVIRONMENTAL COMMITMENTS IS CONFUSING



This confusion manifests itself in an inability to name leaders in sustainability



7/10

ARE UNABLE TO NAME A BRAND WHICH IS A LEADER IN SUSTAINABILITY

5%

MENTION
ecostore

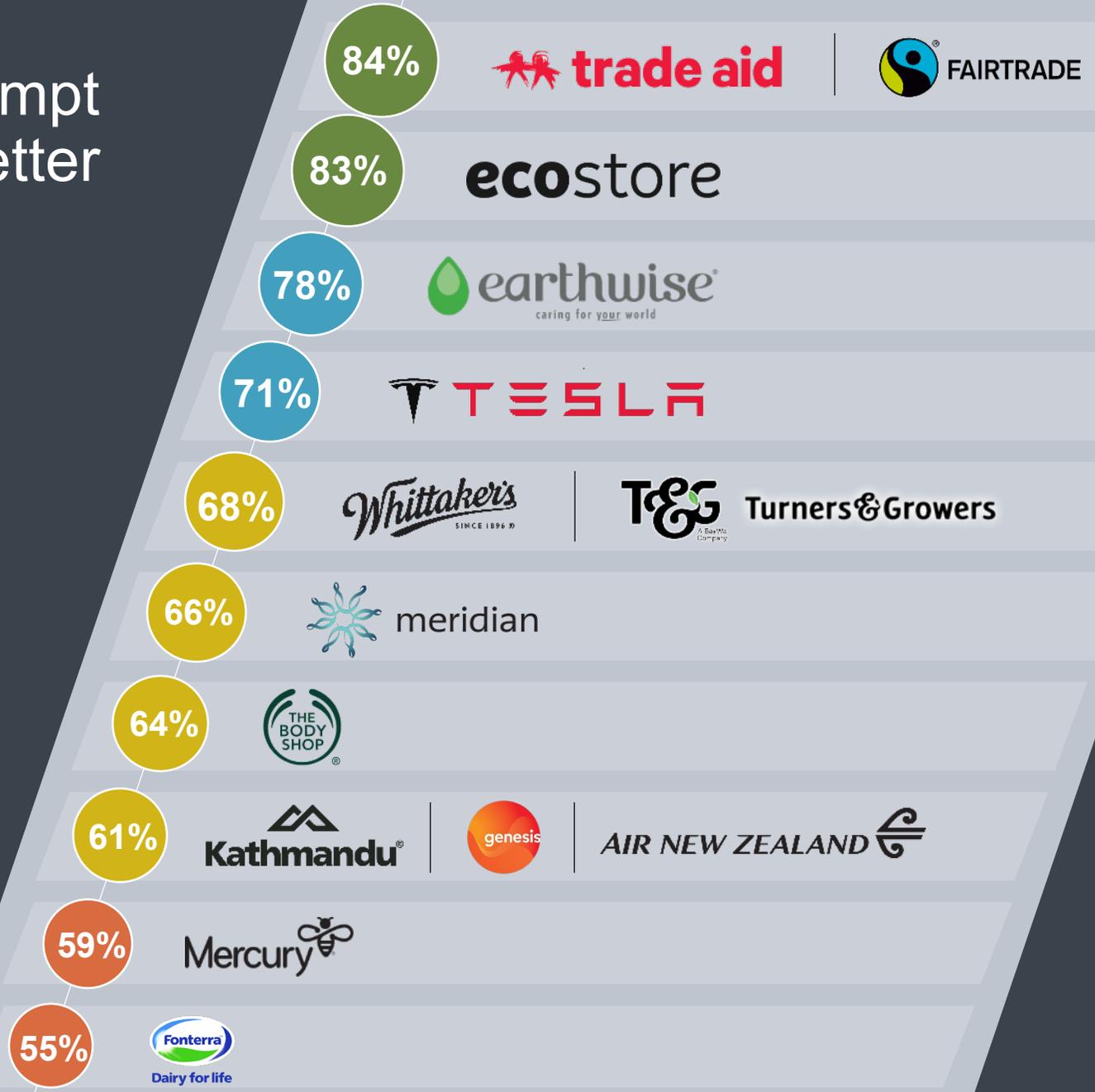
3%

MENTION



Other mentions are all less than 1%

However, when we prompt people we can get a better feel for brands that tell a more compelling sustainability story



Businesses are better at articulating their stories around sustainability to **employees** than consumers



There is a noticeable shift in those who feel their employer cares more about their impact on society than simply financial targets

65%

14
points

agree their employer actively supports society

67%

6
points

agree their employer has values they believe in

66%

13
points

agree they would recommend their workplace to others

People want to feel they can have a bigger impact on the planet... the question is how to enable the action behind the desire



“

“Do not think your single vote does not matter much. The rain that refreshes the parched ground is made up of single drops.”

KATE SHEPPARD

TAKEAWAY OR 'BRINGABACK'

A case study to demonstrate
understanding attitudes
and drivers can lead to
behaviour change
opportunities



The public have a strong emotional response to the impact of plastic waste



This provides the moral imperative to take action, and the public feel they can make a difference

85%

say reducing disposable packaging is the right thing to do

77%

say they can make a difference by reducing use of disposable packaging



“There’s been a lot of dramatic footage coming to light about the plastic island in the middle of the ocean. I watched a horrible video that had a turtle with a straw up its nose. It was so sad.”

BYO CONTAINERS IS NOT YET FRONT OF MIND



Only 1%

of those who buy lunch use reusable containers all the time



“

“I see more people now using reusable coffee cups, but I don't see that many people using reusable containers.”

CONTAINER USER

“I've never seen anyone else go in and do it (use a BYO container), so it never really crossed my mind.”

NON-CONTAINER USER

“People are aware there's an issue with plastic, it's ending up in the ocean and that's not great. But, they might not necessarily make the connection between their lunch habit and that.”

CONTAINER USER

Barriers range from recall, self-perceptions and practicalities



Compostable packaging can lead to an unintended consequence of consumers believing there is less need to take a reusable BYO container



Compostable packaging is better for the environment compared to plastic...

BUT...

It still requires **proper** disposal, rather than working towards a goal of zero waste

It is a single-use product that uses resources to produce and transport to market



PLASTIC CONTAINER



COMPOSTABLE CONTAINER

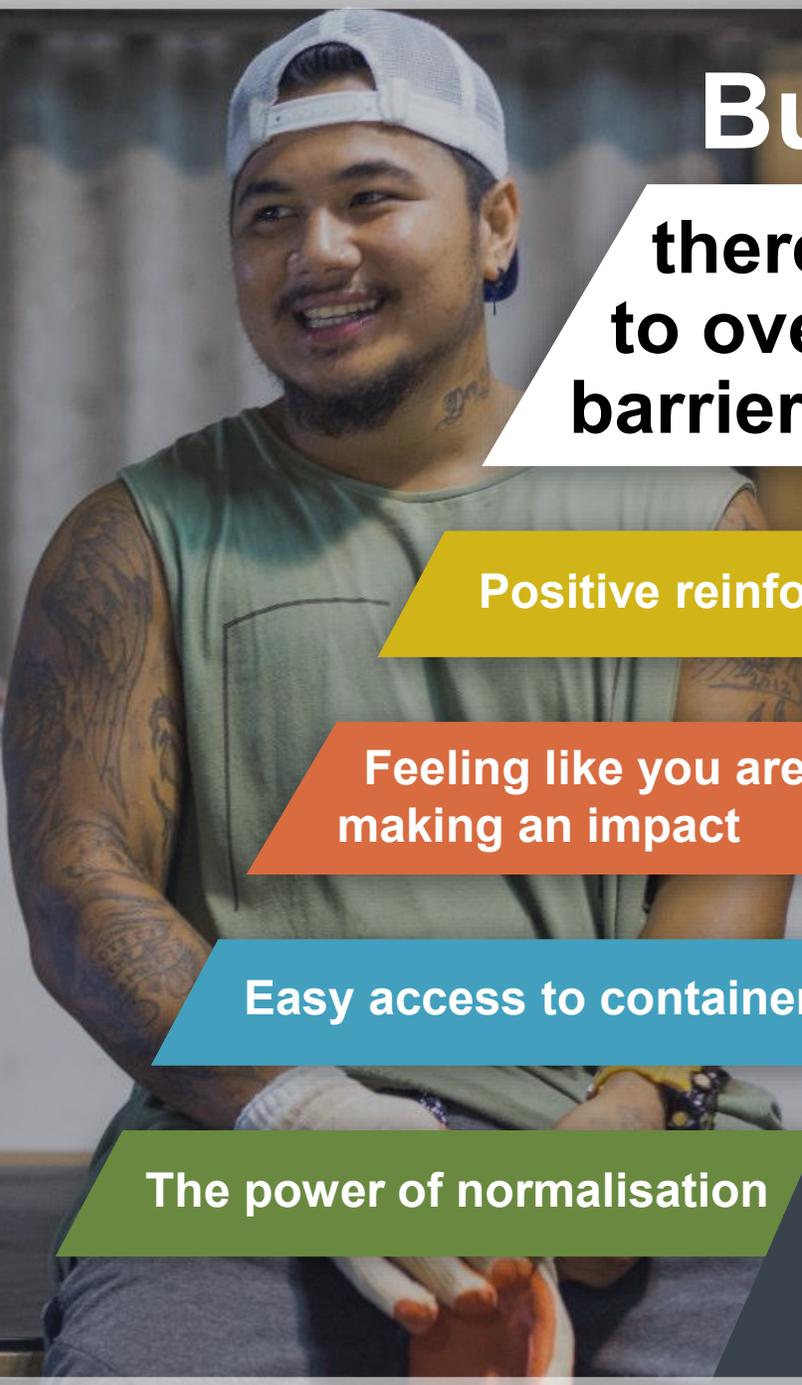


BYO REUSABLE CONTAINER



“I don’t take my own container when I go to [specific food outlet]. They use paper. It’s okay because it’s just cardboard and paper.”

“If people switch towards cardboard instead of plastic containers, people might be less inclined to bring their reusable containers. It’s better than plastic, but much better to bring your own.”



But...

there are ways to overcome barriers...

Positive reinforcement

Feeling like you are
making an impact

Easy access to containers

The power of normalisation

There is a sign saying
you're welcome to  **55%**

You receive a loyalty stamp  **54%**

You know you are
making a difference  **51%**

Receive a reusable
container from work  **50%**

Receive 20 cents off  **47%**

Staff say thank you  **47%**

You see other workers doing so  **39%**

You see your boss doing so  **25%**

3 KEY TAKEOUTS



TAKE OUT

1



Sustainable choices and actions are firmly on the agenda of New Zealanders

With **4 /10 NZers** committed to sustainability there is an obvious need and opportunity for government and business

- Plastic is the lightning rod for consumption issues of our time...
- There is a need to make climate change as tangible for people as plastic



TAKE OUT 2



- Businesses can't ignore the desire for changing consumption behaviour
- Building a solid reputation around sustainability starts with **employees**
- Brands that have been recognised as leaders in sustainability are working from the **inside out**



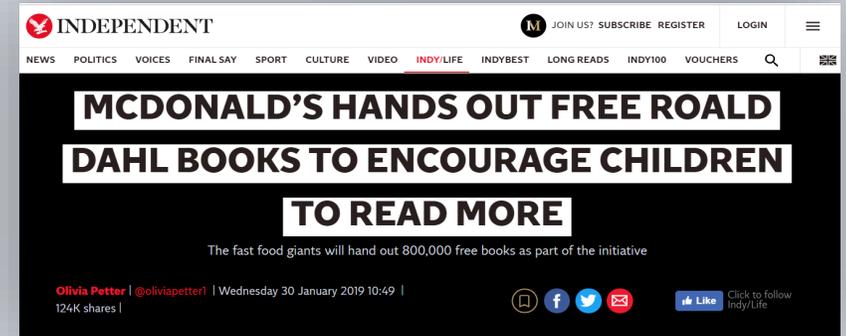
TAKE OUT

3

In the age of 'fake', telling a convincing story is harder than ever

THE CHALLENGE IS FOR BUSINESSES TO...

- Identify who needs to know
- Understand the barriers and drivers to changing behaviour
- Tell your story in a genuine, meaningful and evidenced based way



“

“Blockchain could enable customers to purchase carbon offsets and track them down to the tree being planted.”

Hitting the Green Button Listener Jan 19-25 2019

“

“Countries such as New Zealand do matter and a concerted effort by all is needed to solve this issue. By achieving a successful transition to a low-emissions economy, New Zealand has the opportunity to influence other nations, including sharing its technology and experience.”



NZ Productivity
Commission,
Low Emissions Report,
August 2018



BETTER FUTURES



COLMAR BRUNTON

A Kantar Millward Brown Company

*Celebrating a decade of
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