



COLMAR BRUNTON

A Kantar Company

BETTER FUTURES

2020

Tracking New Zealanders' attitudes & behaviours
around sustainability

**Sustainable
Business Council**



wbcd Global Network Partner



BETTER FUTURES

11 YEARS MONITORING THE ISSUES
NZERS CARE MOST DEEPLY ABOUT





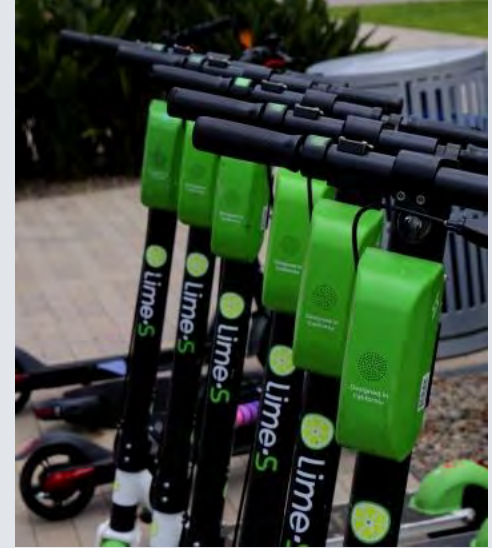
**This wave in addition to
1000 NZers 18+ years
we spoke online to
500 13-17 year olds...**



A total of **17,600** people
over **11** years



What's at the front of NZers minds as we enter **a new decade?**

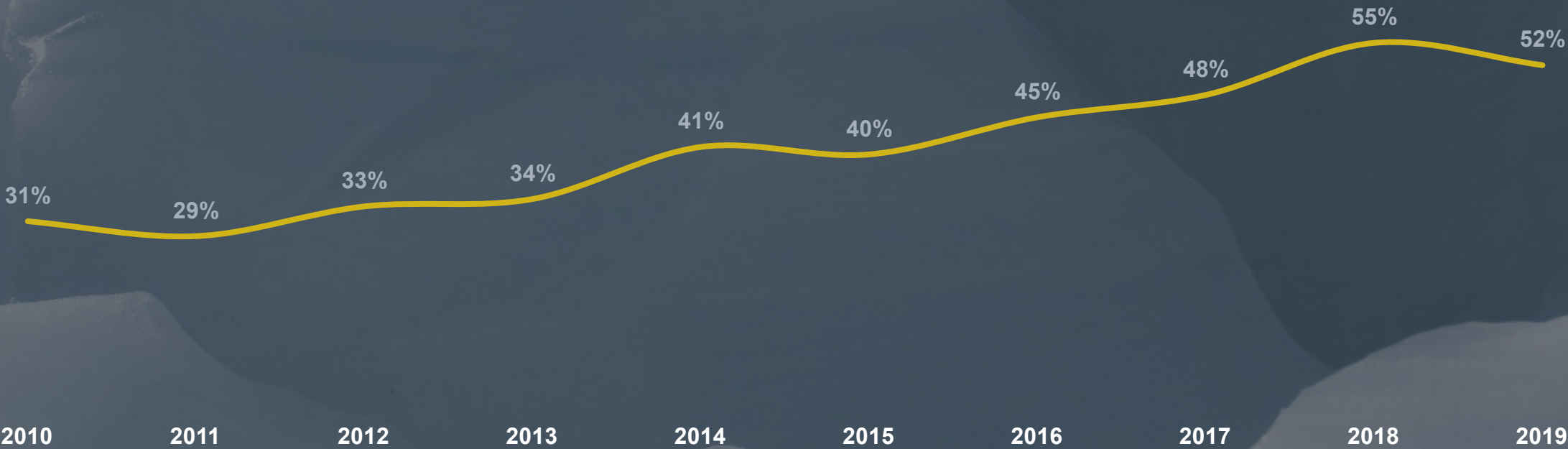


NZ adults and youth are dealing with many social, economic and environmental issues

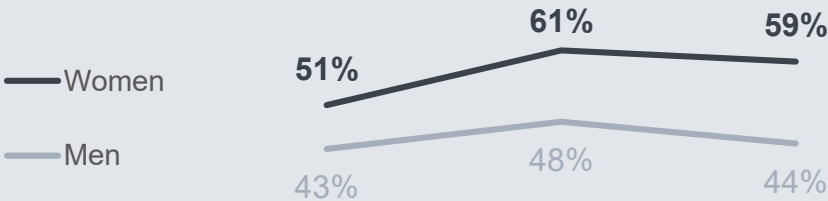


Climate change remains a real concern for at least half the population, particularly women

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

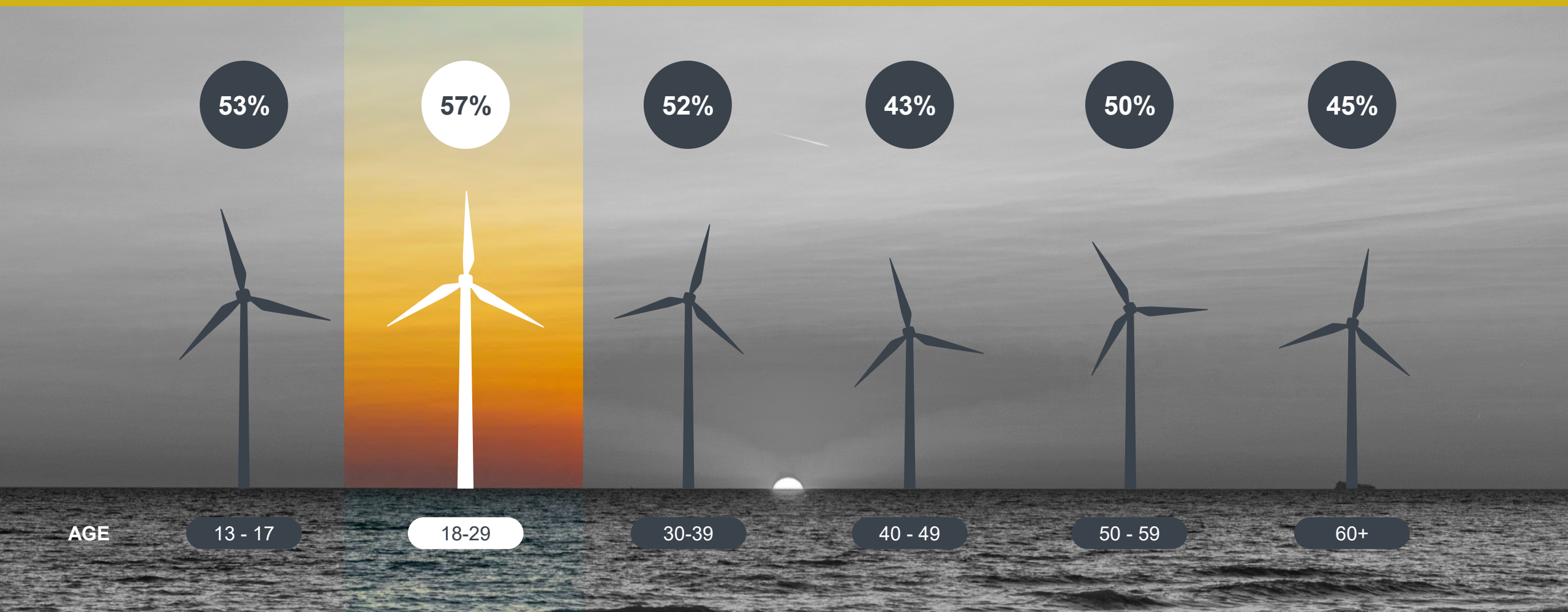


Concern has grown more amongst **women** than men in the last two years



Climate change has had an impact on our mindset and behaviour

50% of New Zealanders say they have **taken action on climate change**



Actions mainly relate to tangible changes in everyday behaviour



ADULTS



I have reduced our household rubbish significantly. Made conscious efforts to update to fuel efficient cars. Reduced use of one use plastic and plastic in general. Do not use so many chemicals in the household cleaning. Dry clothes naturally and have done all the time before awareness of climate change. Turn appliances off that are not in use. Use freeflow vegetables that are not in plastic packaging.

BETTER FUTURES 2020



YOUTH



I went to a school climate strike. I have started to use shampoo bars. I buy second hand clothes whenever I can. My family and I have been not eating as much meat.

**Climate change
discussions have
caused debate
around the need to
eat more sustainably**



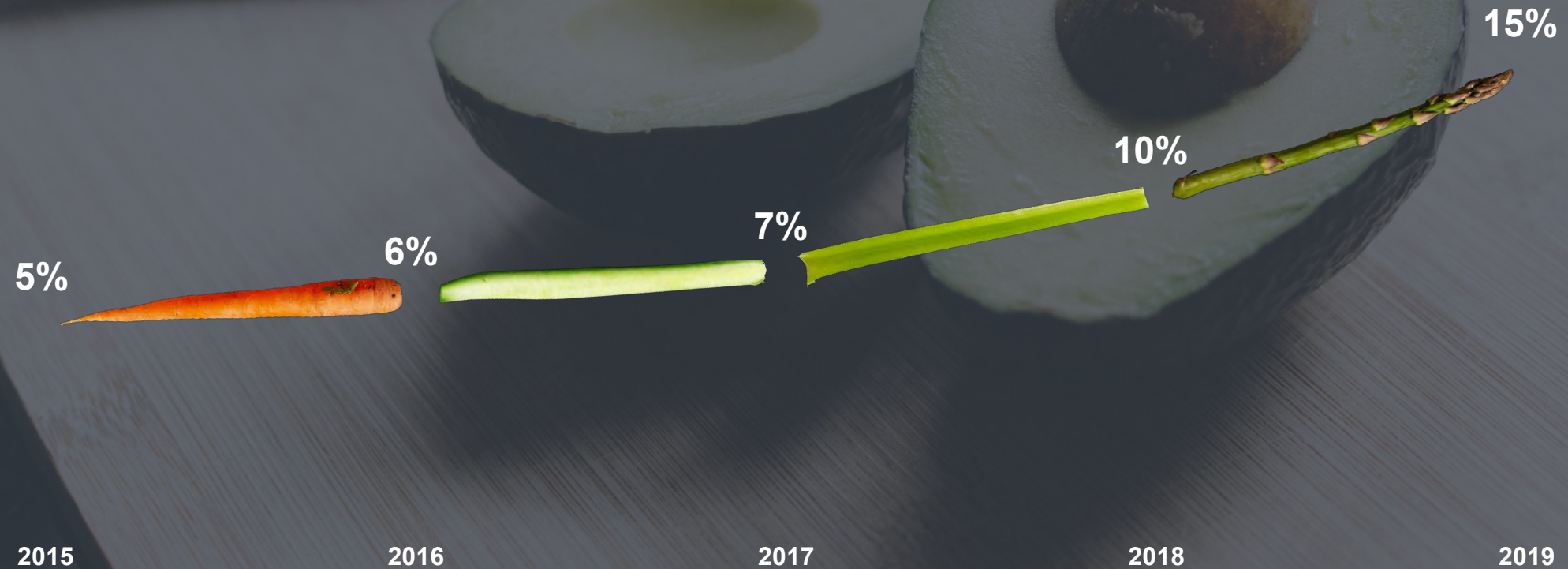
% SOMEWHAT/MOSTLY AGREE

49%
AGREE

New Zealanders
need to change
their **diet** to save
our environment

THE TREND TOWARDS **MEAT FREE** EATING CONTINUES...

% 18+ WHO ALWAYS / MOSTLY GO MEAT-FREE





New Zealanders are even becoming open to the idea of alternative food sources

% WHO WOULD CONSIDER EATING IF IT REDUCED MY ENVIRONMENTAL IMPACT

Lab-grown meat



32%

SIGNIFICANTLY HIGHER FOR:

- 48% 18-29s
- 40% 30-39s
- 38% Male
- 37% Ak/WI/Ch
- 47% Asian

Eating Insects



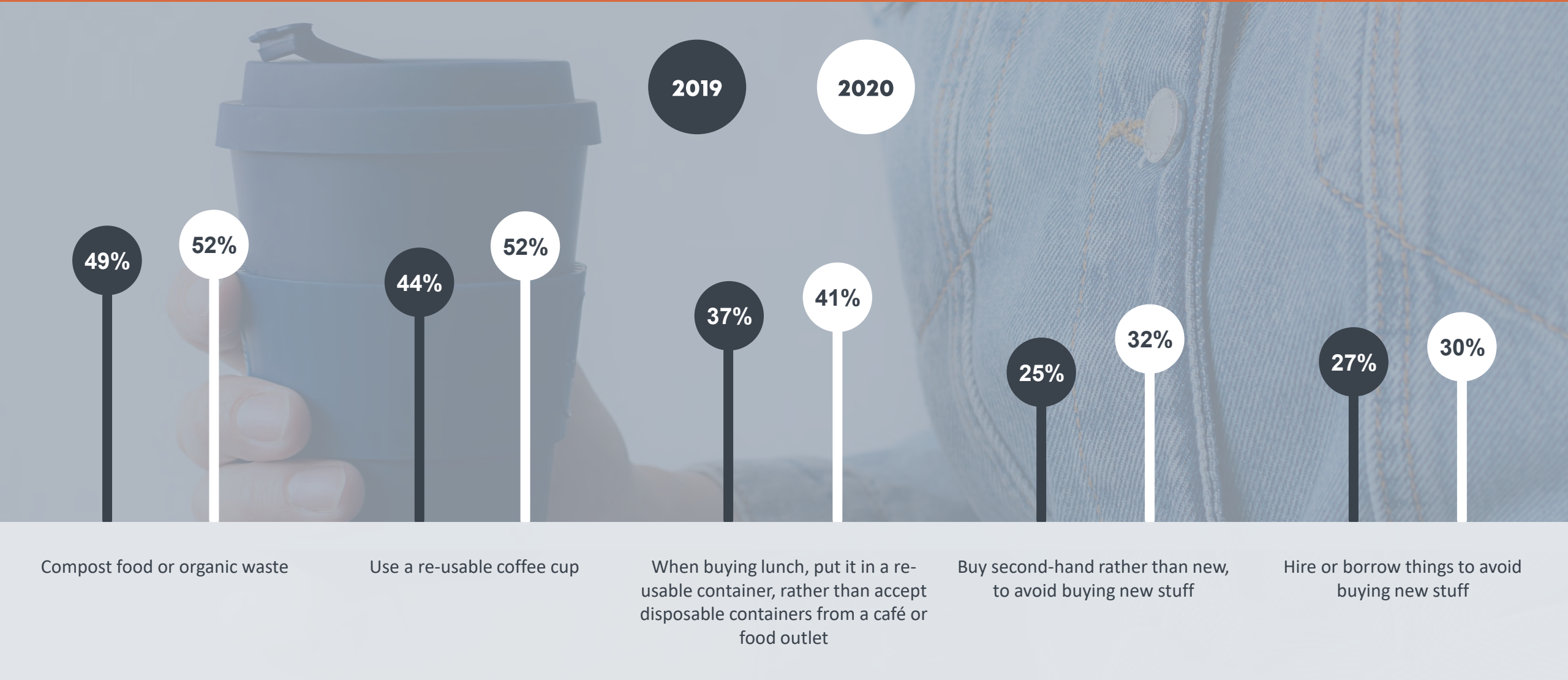
24%

SIGNIFICANTLY HIGHER FOR:

- 33% 18-29s
- 34% 30-39s
- 31% Male
- 26% Ak/WI/Ch
- 35% Asian
- 34% Maori / PI

Additionally there has been an awakening on **waste** ...

% Always / Mostly do this



Plastic bags were the lightning rod... now attention has been turned to the 'excess' of everyday items



LESS PLASTIC! Stop putting it on the consumer to recycle, the business should offer plastic free solutions or be responsible for the recycling of its products.

Reduce plastic packaging. It's good that plastic bags have been removed from supermarkets but there is still so much in the packaging.

We changed brand of soap due to its new packaging, each bar was in plastic, then paper and all of them wrapped again in plastic



I have switched to compostable bin liners, eco store bamboo dish brushes vs plastic, mostly compostable bamboo toothbrushes, corn dish scourer pad

Never buying anything from a \$2 shop or the likes, stopping to think is this a necessary purchase.

I've switched as many of my personal care products to Ethique as all their packaging is compostable

Brands that demonstrate clear sustainable benefits are winning consumers over

48%

have deliberately switched to a brand/service provider which is more sustainable

Toothbrush Grin - products are biodegradable

Kettle chips because they have changed their packaging to a box

Stopped buying skincare products from big chain stores and instead buying from eco store such as Lush

Have switched to a friendlier cold water washing powder - have changed to LED light bulbs in the house

Changed from a V8 to a 1.4 fuel efficient vehicle

Ethique hair products as they don't use plastic, NZ made, low waste.

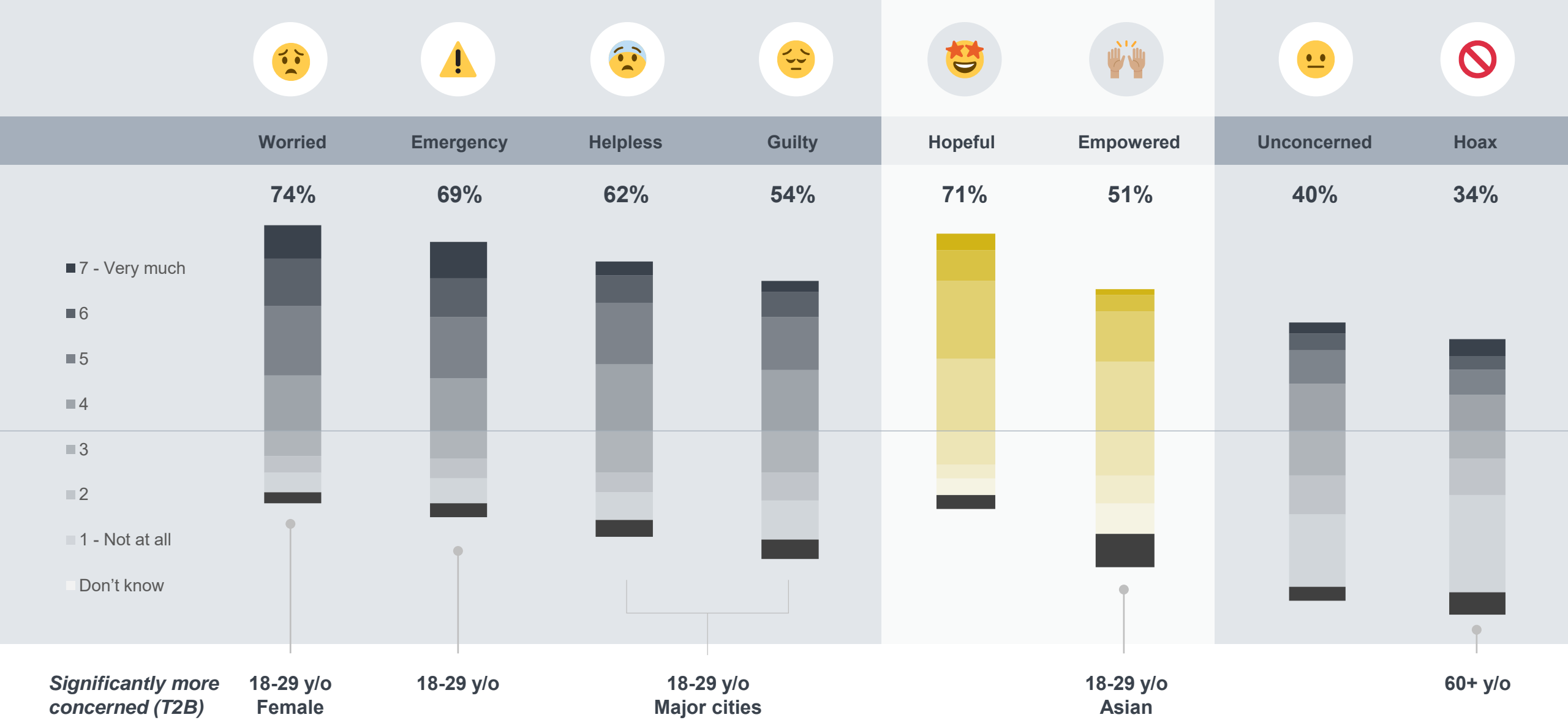
Stopped using Aliexpress and buying locally/within NZ

Changed to NZ based providers like TSB

I am now avoiding products that use ingredients that are not cool..like palm oil.

I have switched out ALL our household products to an eco-brand that uses sustainable ingredients and packaging

As a topic however, climate change causes divergence in opinions – between generations, genders, cultures and communities.





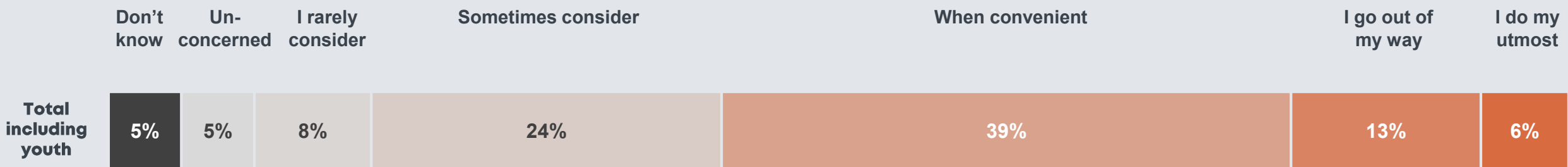
*You idiots we can't
change the weather
- there is NO
anthropogenic
climate change*

Male 60+



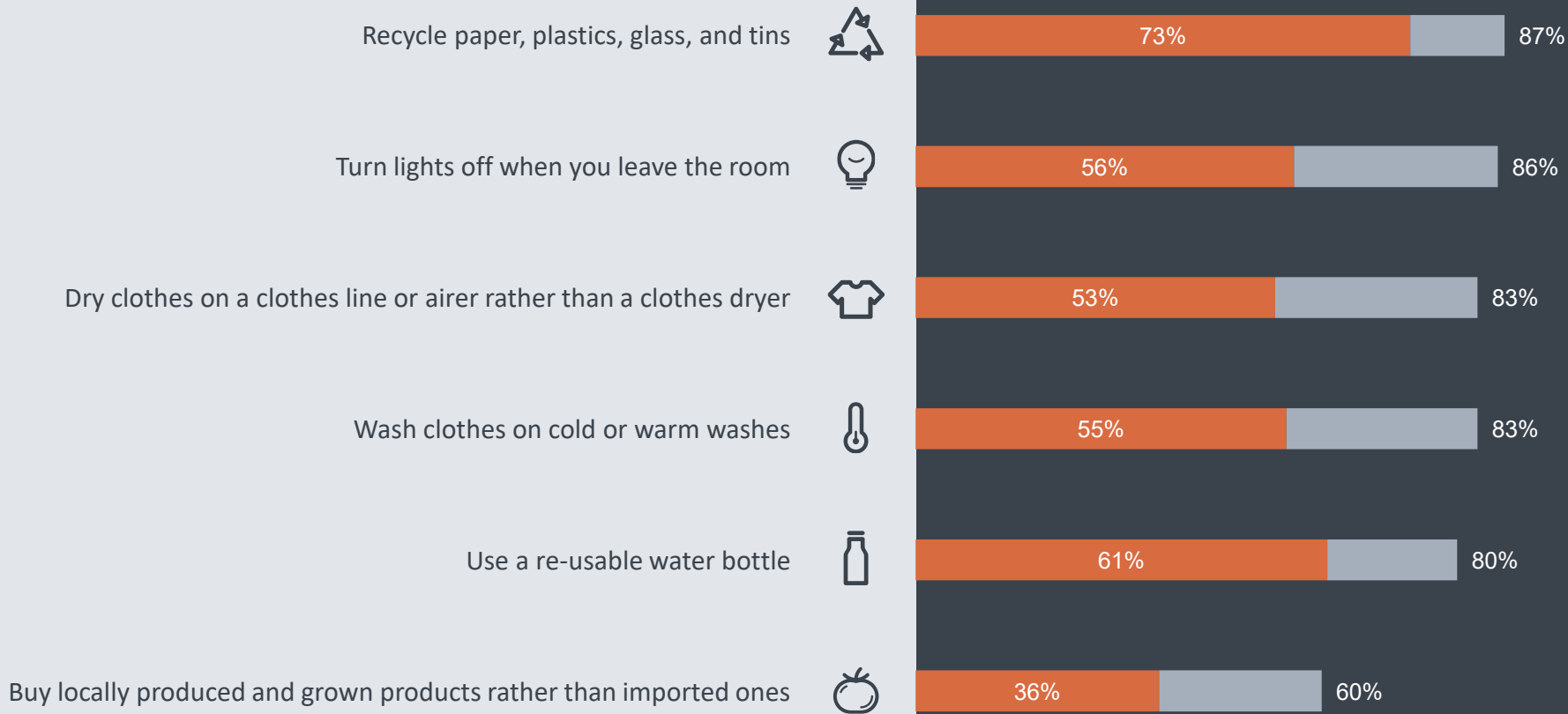
“OK, Boomer”

So when it comes making sustainable choices, if the case for change is weak, people will stick with what is easy and convenient

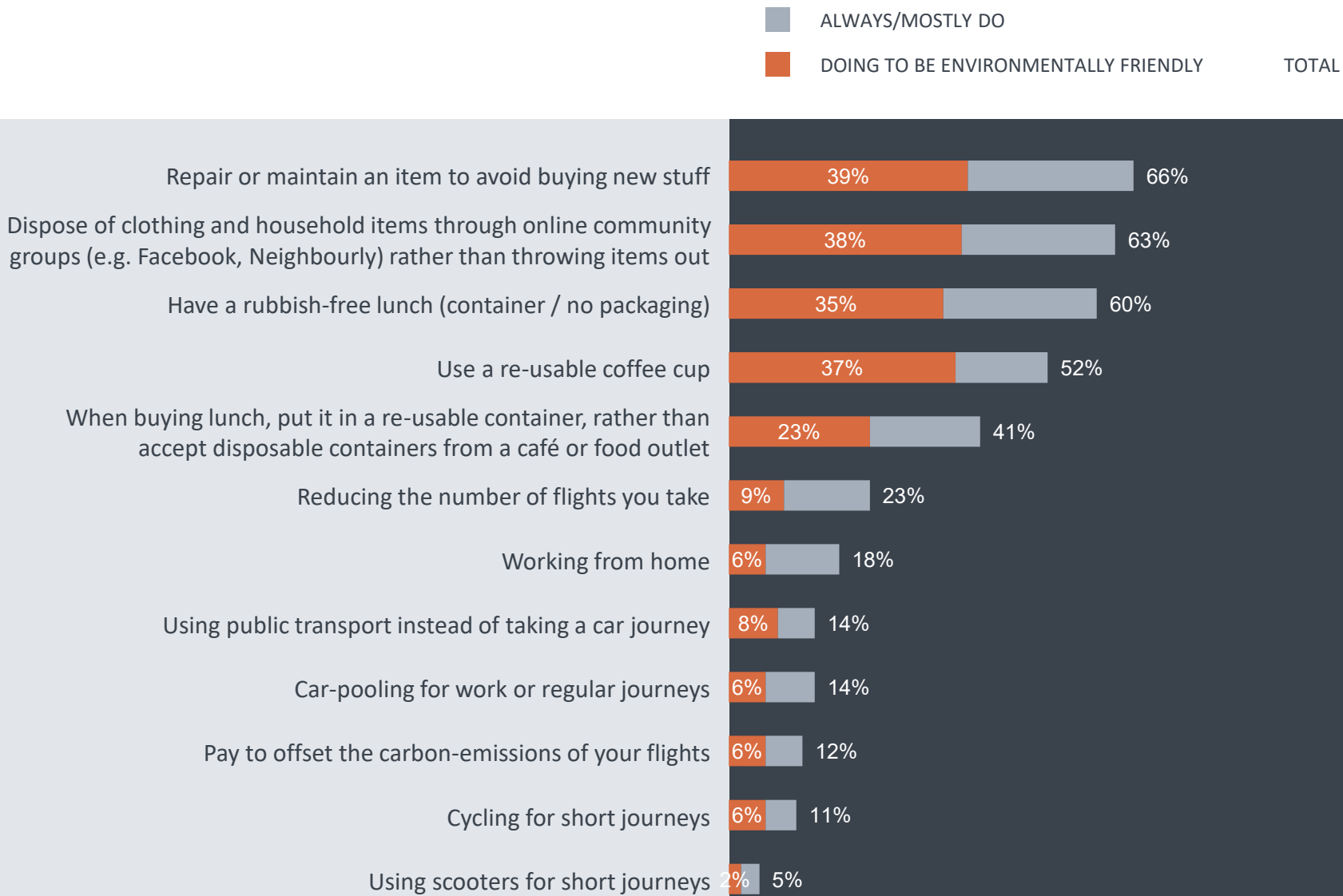


Many 'sustainable' behaviours are being done without the environment front of mind, there are other benefits (e.g. cost)

ALWAYS/MOSTLY DO
DOING TO BE ENVIRONMENTALLY FRIENDLY
TOTAL



For those sustainable behaviours that require more effort, communicating other benefits may help a broader audience get on board to benefit the environment



But we are not going to save
the planet with keep cups...

New Zealanders are looking for leadership



*Human beings need, and
respond to, solutions that
improve their security, income,
health and habitats.*

JEREMY LENT

Author of “The Patterning
Instinct”

GLOBALLY IT'S COMING IN THE FORM OF A CHILD

SKOLSTREJK
FOR
KLIMATET



*The moment we decide to fulfil
something, we can do anything.*

**Houses of Parliament, UK, 23
APRIL 2019**

The impact has resonated with NZ teens



76%

of 13-17s are aware of the recent school strikes regarding climate change

28%

say that they have participated

Major cities 80%

Female 35%





I have gone to all of the climate change protests to show the leaders that climate change is important to people my age and they need to start to do something about it before things get too bad and the damage can't be undone.



Debates interest in climate strike (wanted to participate but couldn't) Following leaders such as Greta Thunberg Doing school performance on climate change being a global issue



My school had some people do a climate change walk around town and I joined in and lots of people joined in

Youth 13-17 years



Even New Zealanders with **more moderate views towards climate change** concede that there are **some actions** to improve the situation



The climate is going through a natural cycle but reducing CO2 emissions may be a little helpful. But certainly not worth destroying economies as it will make limited difference. Restricting pollution into land and sea will make a big difference to sea life sustainability and production of oxygen. Have recycled plastic for decades.

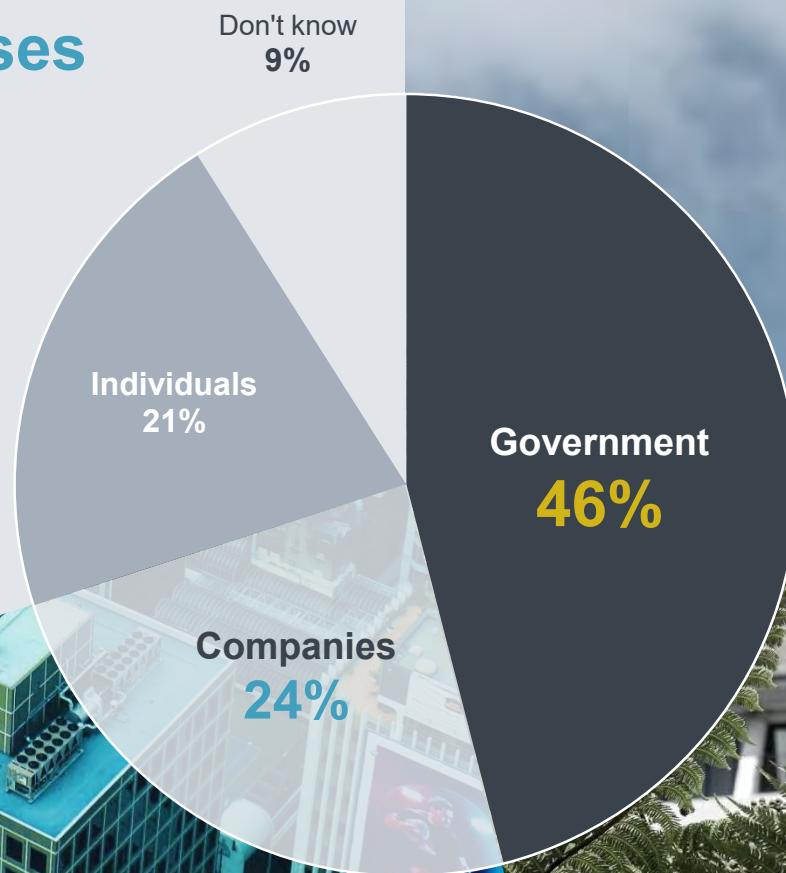
Male 60+



So who are New Zealanders seeking
leadership from when it comes to the
issue of **climate change**?

New Zealanders want
government and **businesses**
to show the way

And this is consistent
across demographics

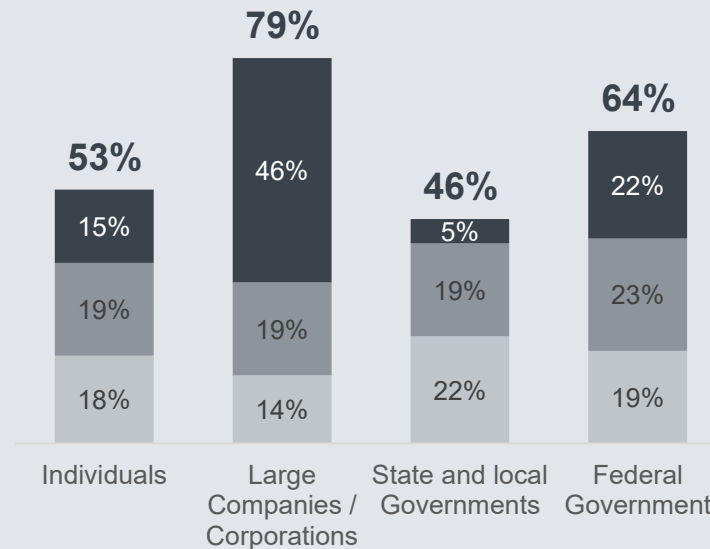




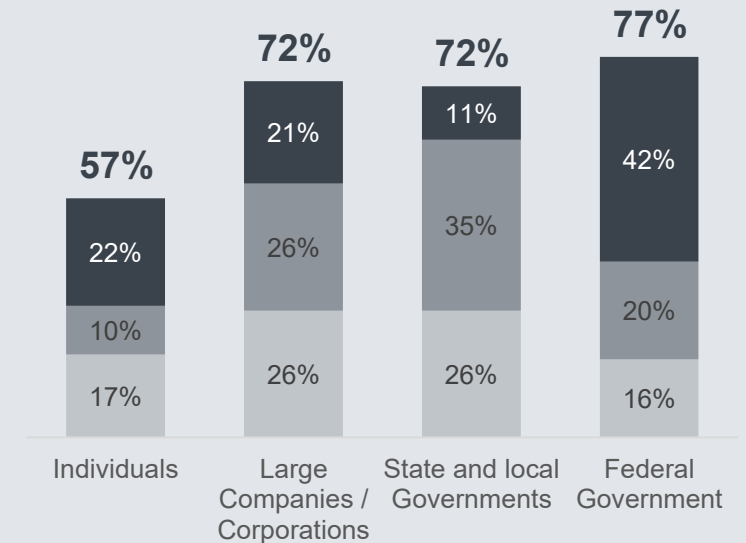
This is echoed globally...

**People blame
business &
government for
creating the
problems –
and expect them to
take responsibility**

**Who do you believe has had the most
negative impact on environmental
problems in the world?***

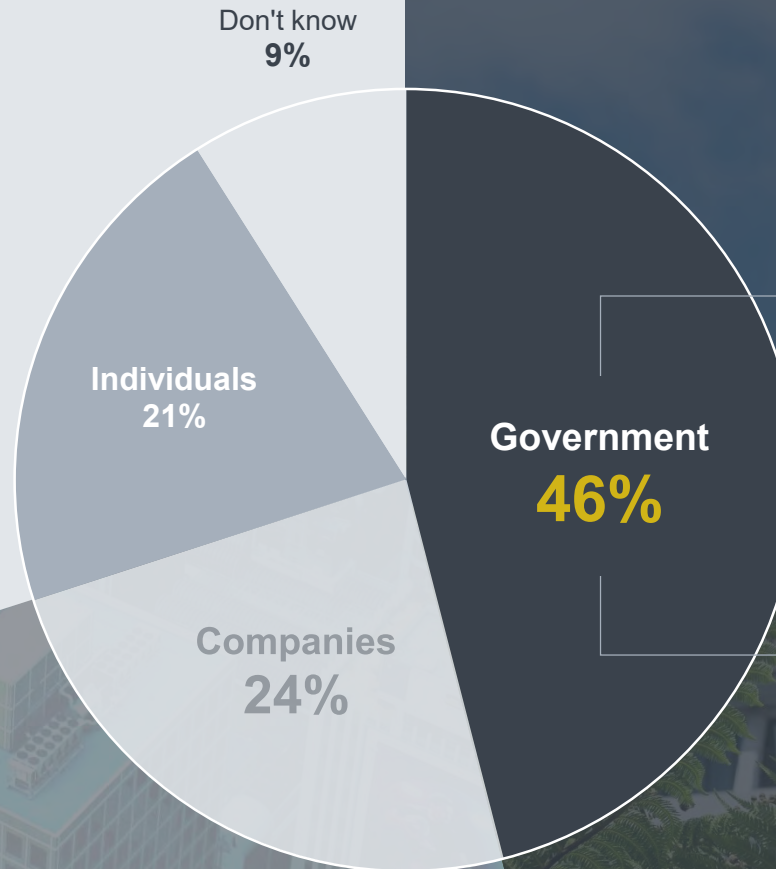


**Who do you believe has the greatest
responsibility for addressing
environmental problems in the world?**



New Zealanders who say
Government should lead the
way are significantly more
likely to **already be doing**
what they can to help

Consistent across all demographics



74%

*Environmental policies are
important in how I vote*

73%

*Look for claims/labels that
choices I make are
environmentally/animal friendly*

There is an opportunity for Government to engage with young New Zealanders...but some trust to be gained.



60%

of 13-17 year olds are very/somewhat interested in politics

65% 16-17s

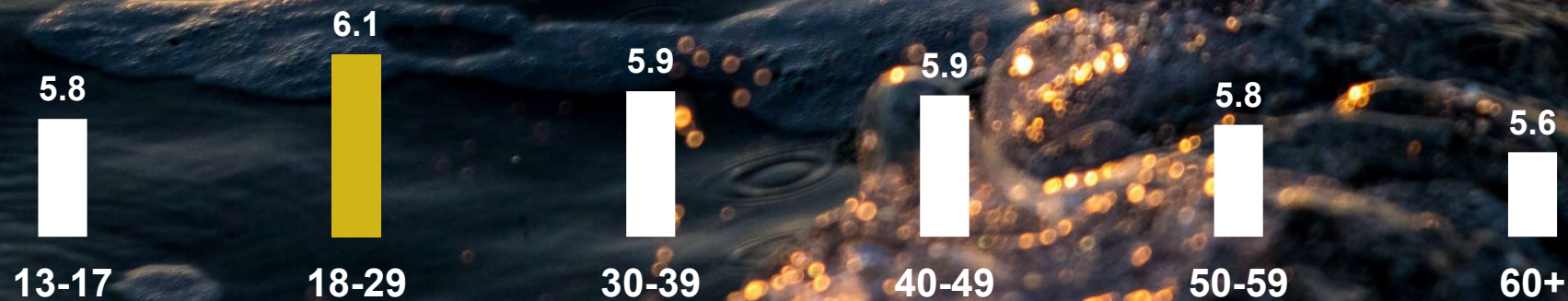
BUT



70%

believe that politicians do not take notice of the concerns of young people

Young New Zealanders of voting age feel most empowered to make an impact on issues relating to climate

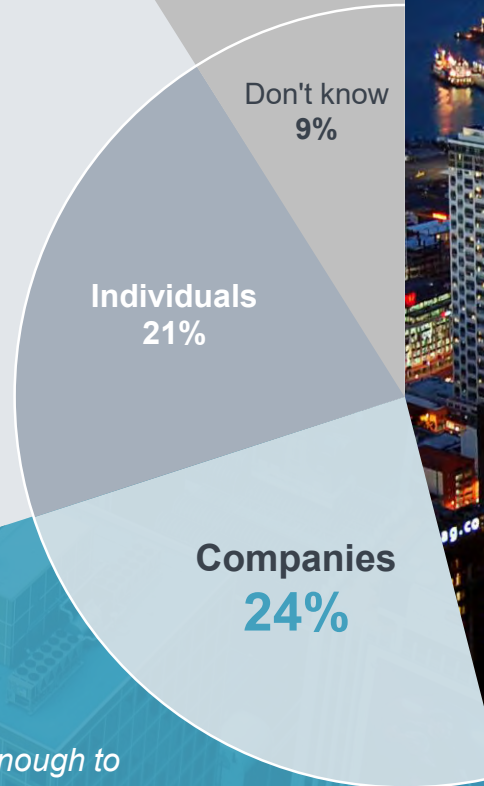


AVERAGE RATING FOR EMPOWERMENT 5.8 OUT OF 10



*[I have] chosen a career and education in Renewable Energy.
I act as a consultant to developing nations most at risk to climate change
developing their own resilient infrastructure.*

Those who say **Companies** should lead the way think more can be done... and they say they are prepared to pay for it



- 83%** *agree businesses aren't doing enough to reduce environmental impact*
- 70%** *look for claims/labels that choices I make are environmentally/animal friendly*
- 67%** *will make eco-conscious choices, even if more expensive*



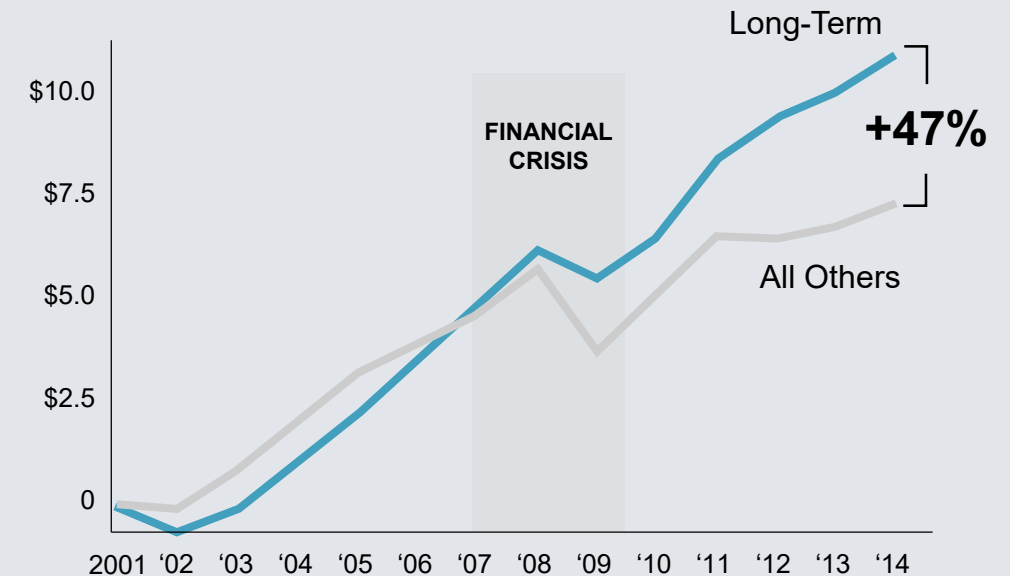
Sustainability is becoming the **number 1 strategic priority** for business ...

and the business case is clear



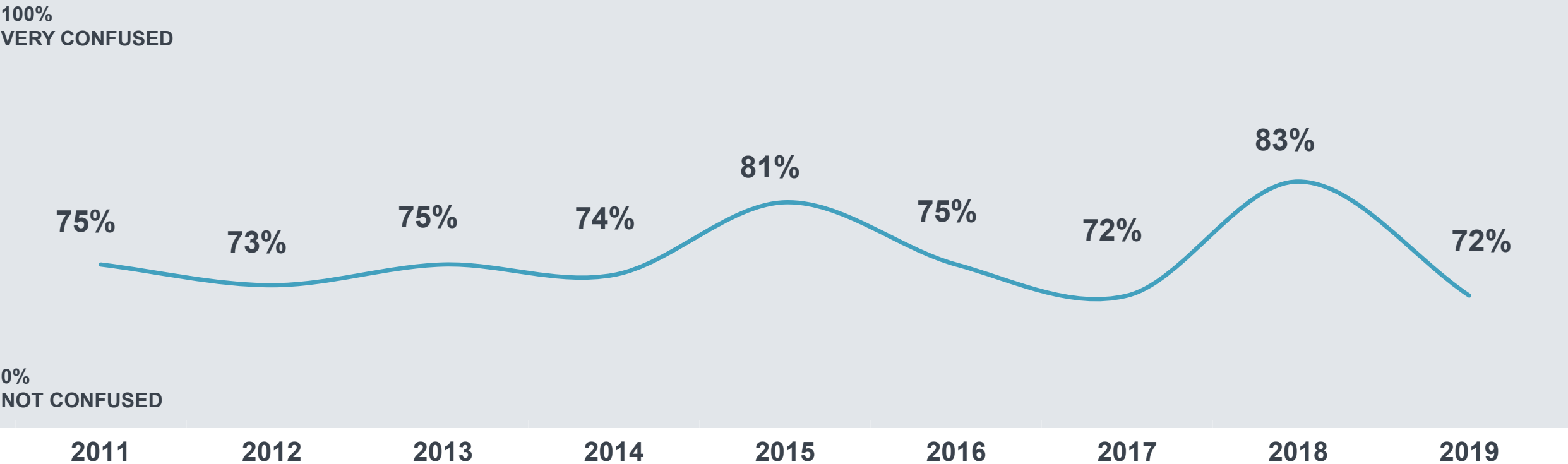
“Companies that outperform in important social and environmental areas achieve higher valuations and higher margins.”

Rich Lesser, President & CEO, BCG



The way businesses talk about their social and environmental commitments is still confusing so simplicity is key

CONFUSION LEVELS



People recognise that there are brands outside the eco universe that are working hard to be leaders in sustainability

75%+ agree

ecostore

 **trade aid**

 **earthwise**
caring for your world

 **FAIRTRADE**

65 - 74% agree


Meridian.

Whittaker's
SINCE 1896

 **THE BODY SHOP**



Mercury 

 **contact**

TESLA

50 - 64% agree

 **genesis**

Turners & Growers


Kathmandu

FISHER & PAYKEL

AIR NEW ZEALAND 



PAK'nSAVE

 **Sanitarium**
The Health Food Company

 **Farmers**

MITRE 10

 **vector**

countdown 


Dairy for life

 **TOYOTA**

 **all good**

thewarehouse //

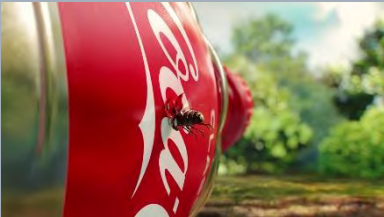
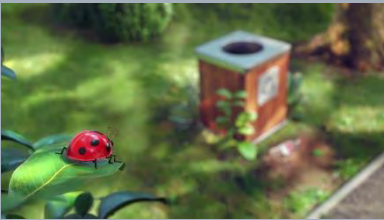

ENERGY

The sustainability message is potent – getting it right leads to significantly better advertising results



Viral Pass On
Think Differently about the Brand
Main message take out
Positivity towards the Brand

X2
X2
X3
X2
vs. the average



Consumers have no shortage of suggestions for how business could make them feel socially, economically or environmentally better about their choices...it's up to business to seize the opportunity

"Invest in exploring more sustainable packaging so what we're buying isn't being packaged in material we end up throwing away almost instantly."

"Work together with other businesses with recycling"

"Make better quality, longer lasting products"

"Stop outsourcing to sweatshops"

"Be more mindful of the waste they are producing and seek out more sustainable ways to manage waste i.e the automotive industry controlling waste products like oil, tyres, old parts..etc."

"Accept all their packaging back as part of their environmental impact"

"Make products that last, make accessories compatible across different models"

"More use of local ingredients/products/ parts to avoid transportation pollution"

"Increase the wage to make healthy food or any food unwrapped affordable"

"Transparency in the process of making their product, use materials that can be reuse"

"Specify how their product and product packaging can be recycled"

In many instances sustainability will require transformative thinking.



ALL businesses could start thinking OUTSIDE their pockets - it is time they realised that the mighty dollar isn't such a great thing especially at the expense of land and people and animals.

Female, 70 years

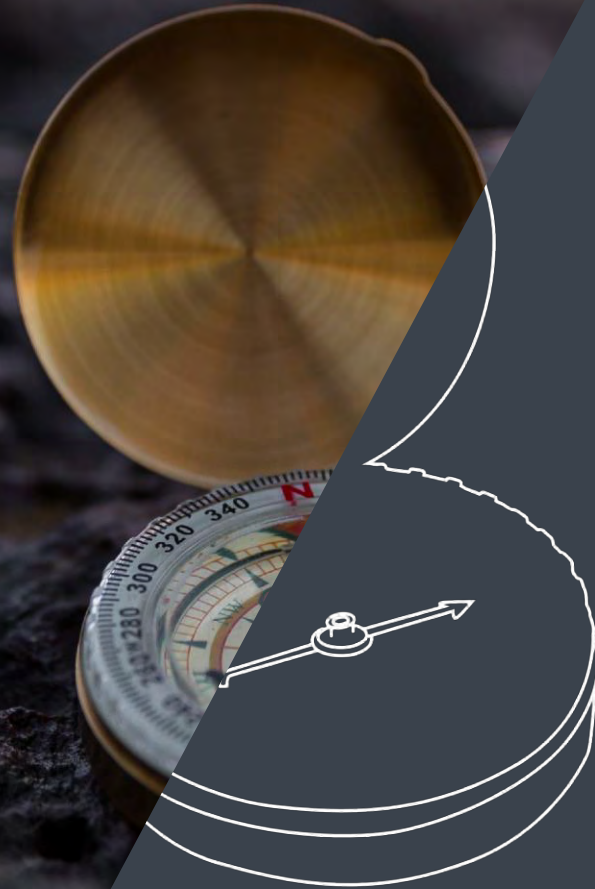


Change their focus from profit based to environmental based

Male, 54 years



Where to from here?



It is not 'the' environment, it is 'our' environment. We are not separate from it and never have been.

DAMON GAMEAU



**For the sake of our
nation's wellbeing and
for our youngest citizens,
there is a need for
leaders to override worry
with a sense of optimism**



**The global narrative
around climate
change has spurred
consumer action on
a number of fronts...**

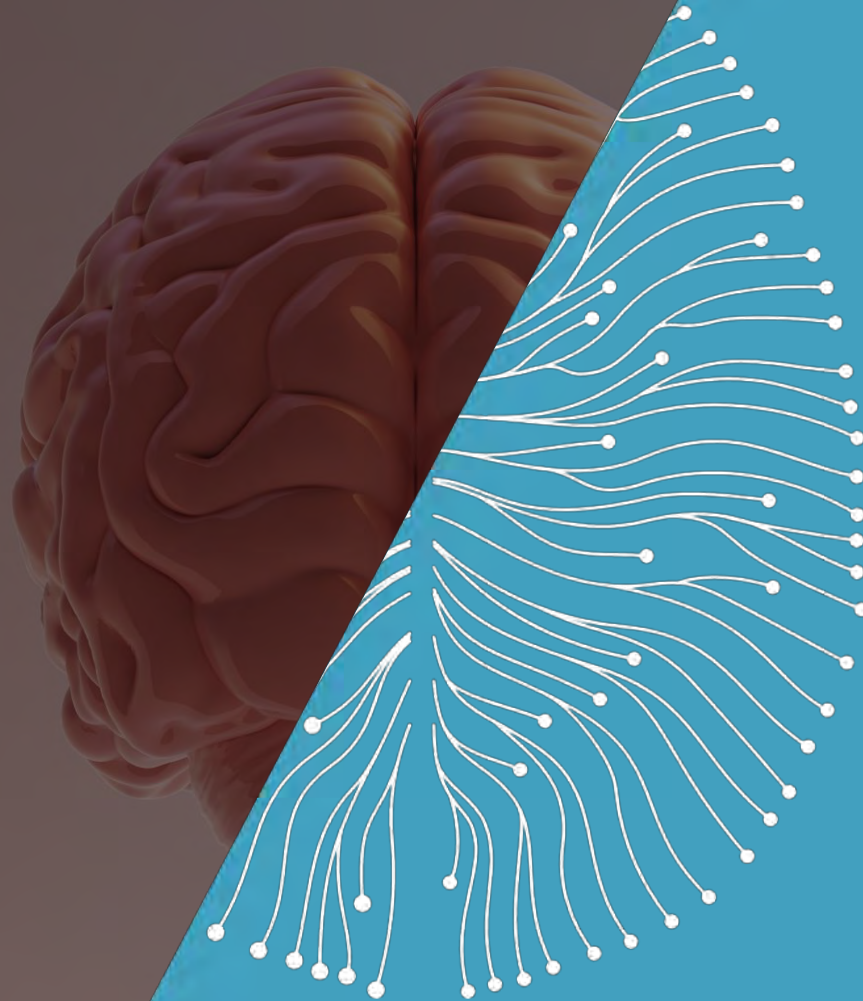


COLMAR BRUNTON
A Kantar Company



**Business and
government can
respond by putting
sustainable needs
at the heart of
decision making**

**Divergence on
the issue of
climate change
can cause apathy
and inaction**



**Those brave enough
to show a way
forward through
transformative
leadership will win
the hearts and minds
of consumers ... and
ultimately be
financially better off.**



COLMAR BRUNTON

A Kantar Company

Convenience has become an inconvenience as consumers struggle to balance their busy lives with the needs of the planet



COLMAR BRUNTON

A Kantar Company

There are big opportunities for businesses and brands that listen to needs, innovate for and communicate about sustainable benefits to their consumers.



***How wonderful it is that
nobody need wait a single
moment before starting to
improve the world.***

ANNE FRANK



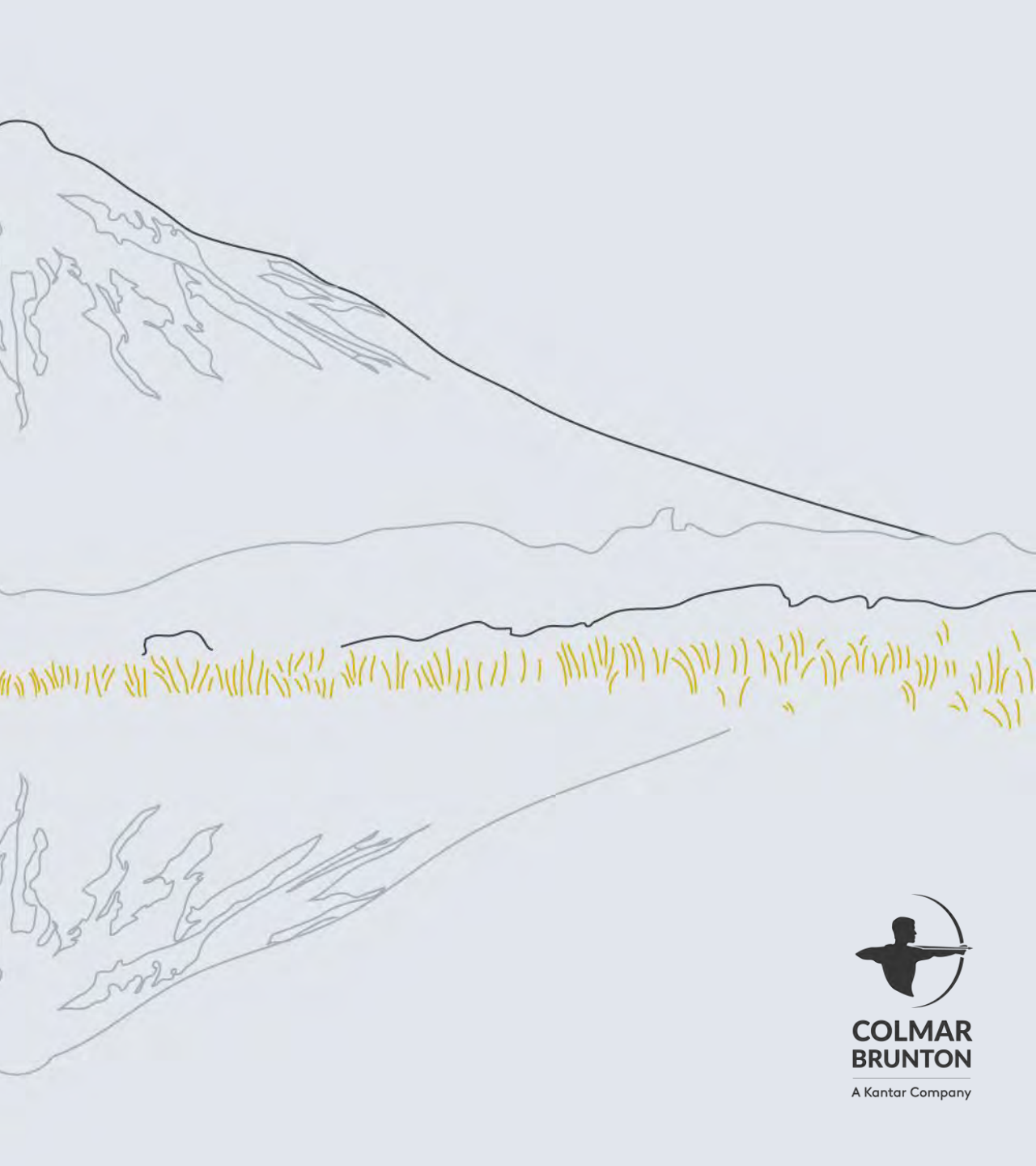
COLMAR BRUNTON

A Kantar Company

**Sustainable
Business Council**



wbcd Global Network Partner



CONTACT US



info@colmarbrunton.co.nz

