

KANTAR

BETTER  
FUTURES  
2026

Sustainable  
Business Council 

 Global  
Network

# 1.

Where are  
New Zealanders  
in 2026?



# 3.

How does  
sustainability vary across  
generations?



# 2.

How are  
New Zealand  
businesses turning up?



# Methodology Details

MAIN SAMPLE

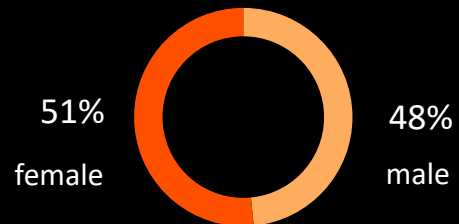
Fieldwork dates:  
12<sup>th</sup> – 23<sup>rd</sup> January 2026

Sample Size:

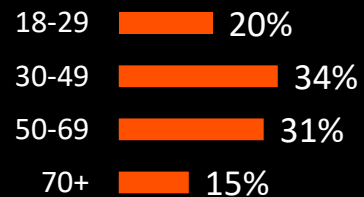
1001

## Nationally representative

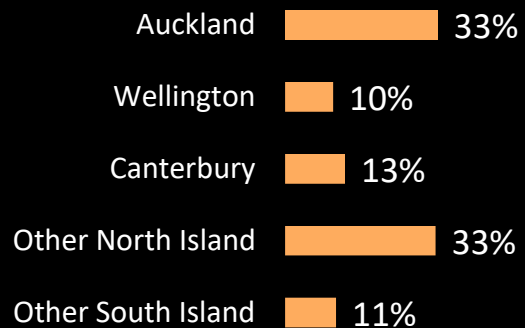
### Gender



### Age



### Region



1.

Where are  
New Zealanders  
in 2026?

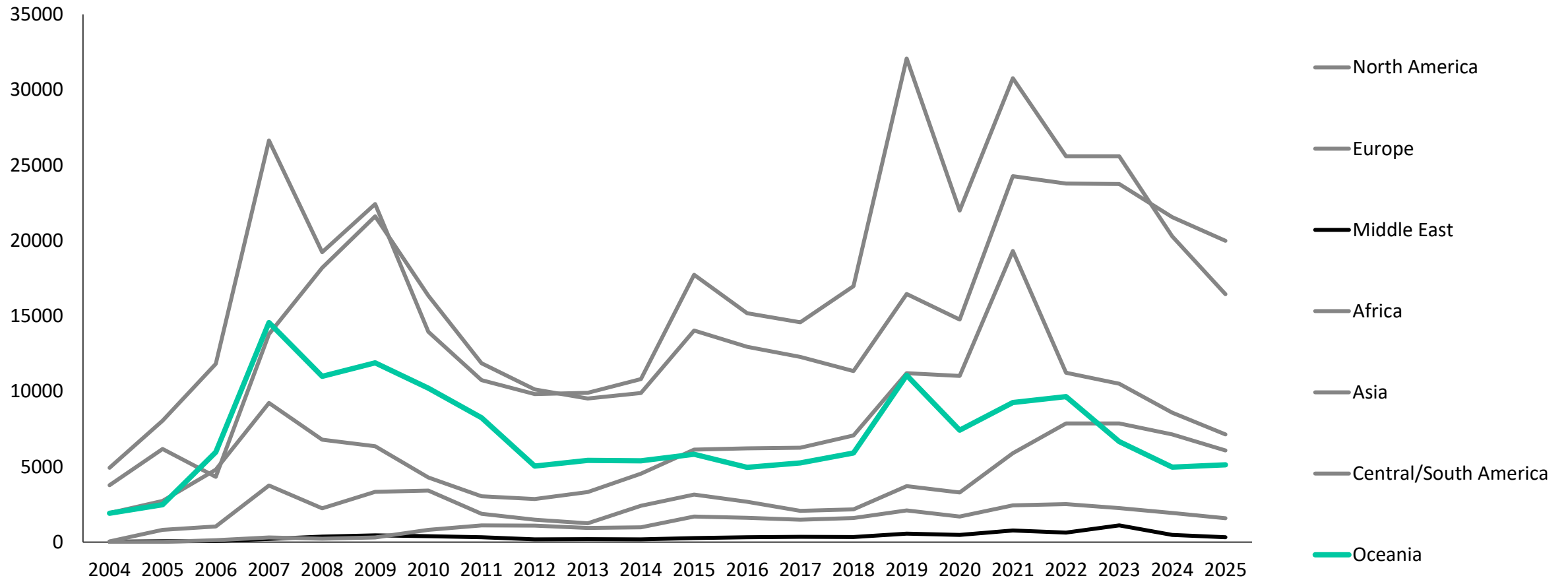


# Globally, sustainability is competing for attention amid multiple crises



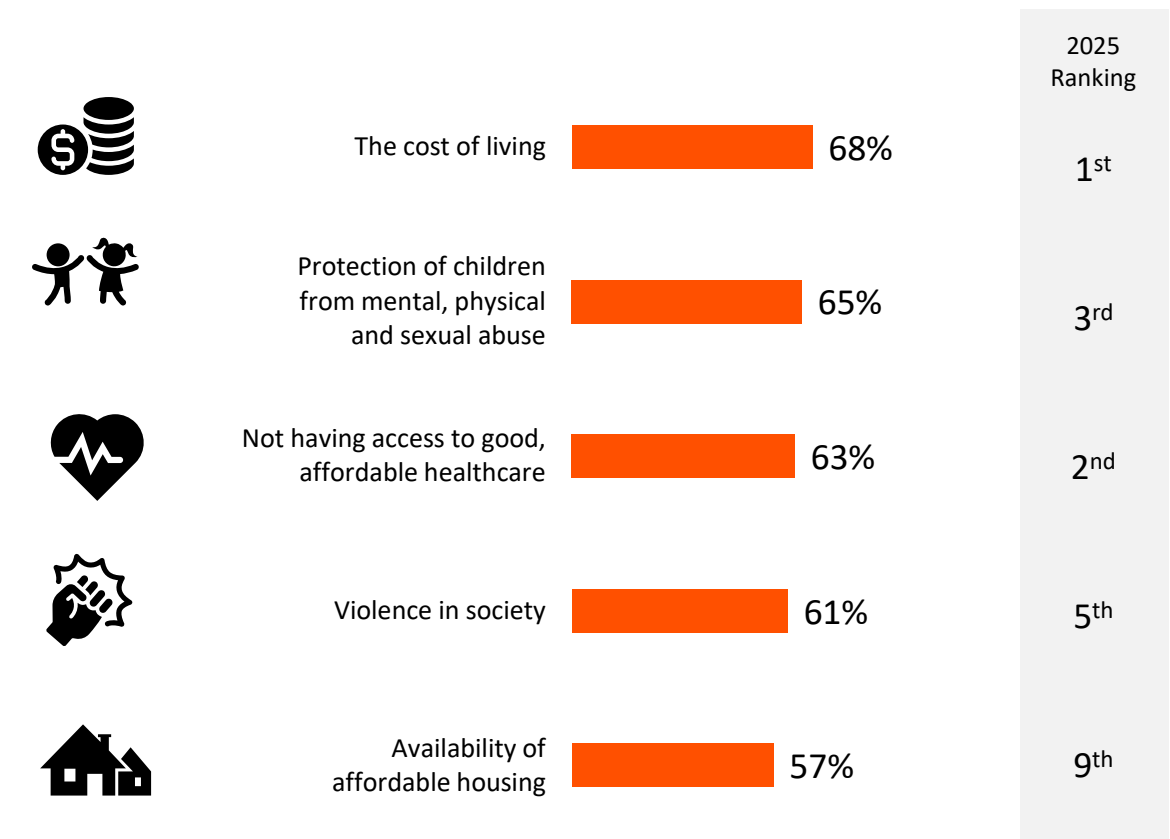
# These immediate crises have crowded out climate and environment in the media

## GLOBAL NEWSPAPER COVERAGE MENTIONING CLIMATE CHANGE

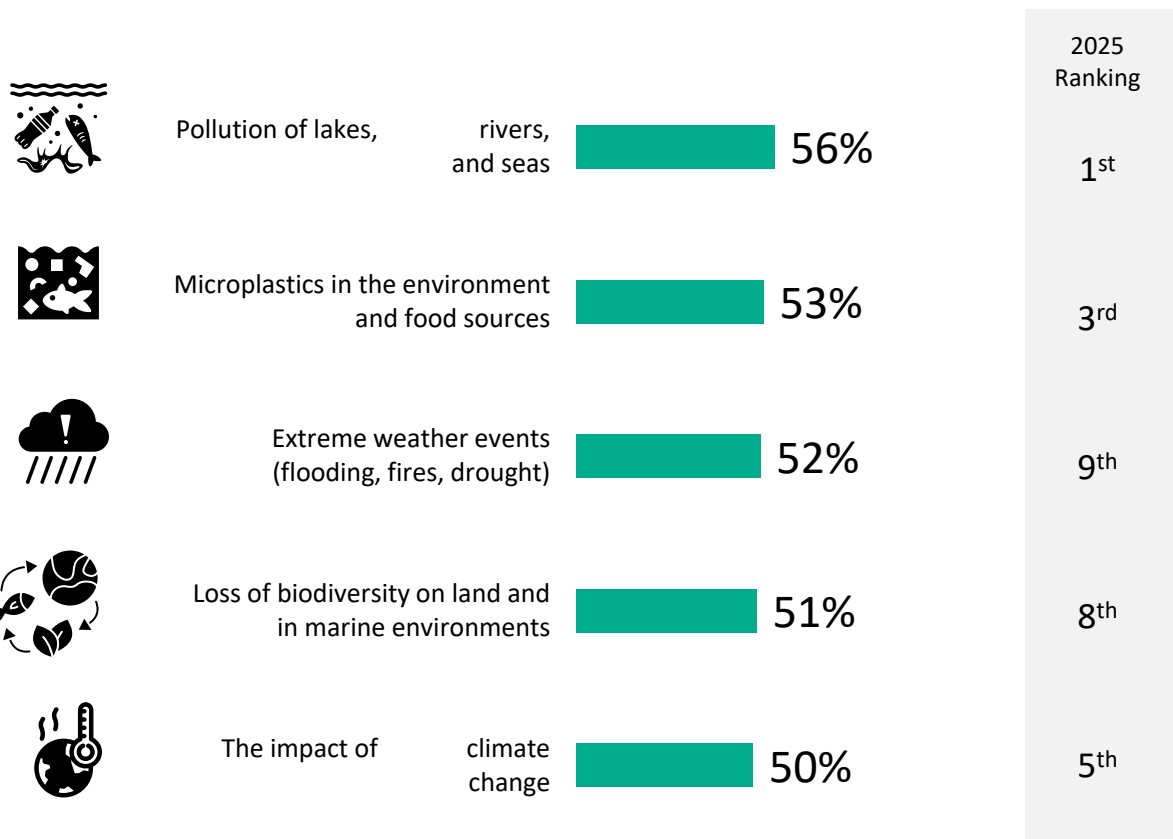


# The key issues of concern to New Zealanders remain primarily related to community resilience, while extreme weather events have leapt back into public awareness

## TOP 5 OVERALL CONCERNS

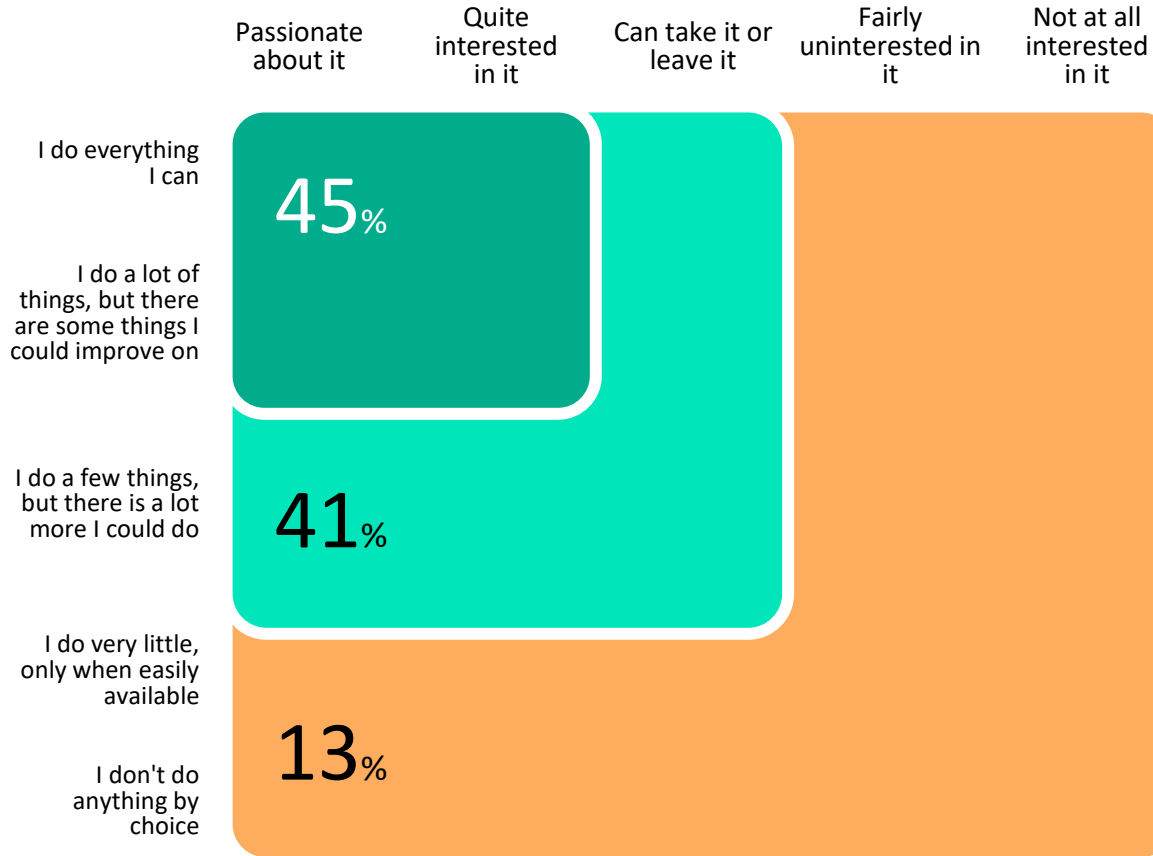


## TOP 5 ENVIRONMENTAL CONCERNS

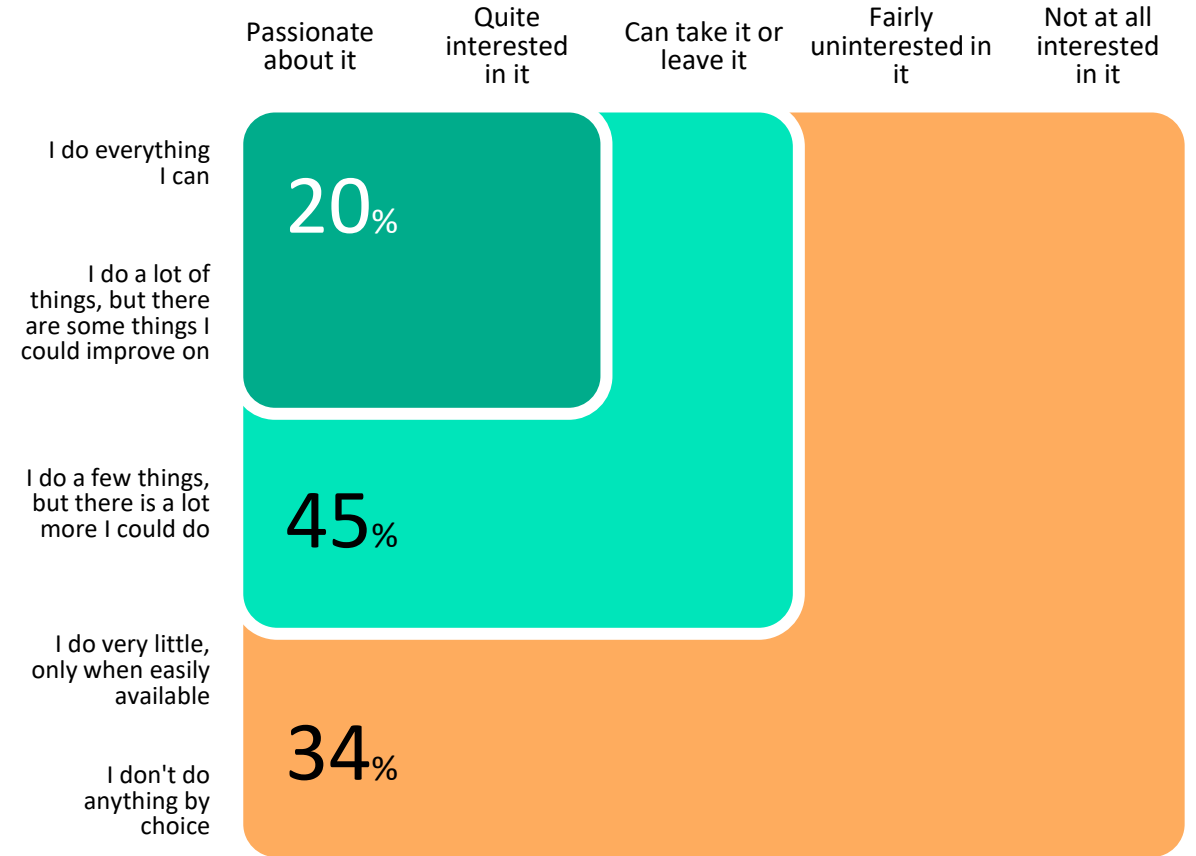


# Despite this social emphasis, we again see that the level of environmental commitment is notably stronger

## ENVIRONMENTAL SUSTAINABILITY COMMITMENT

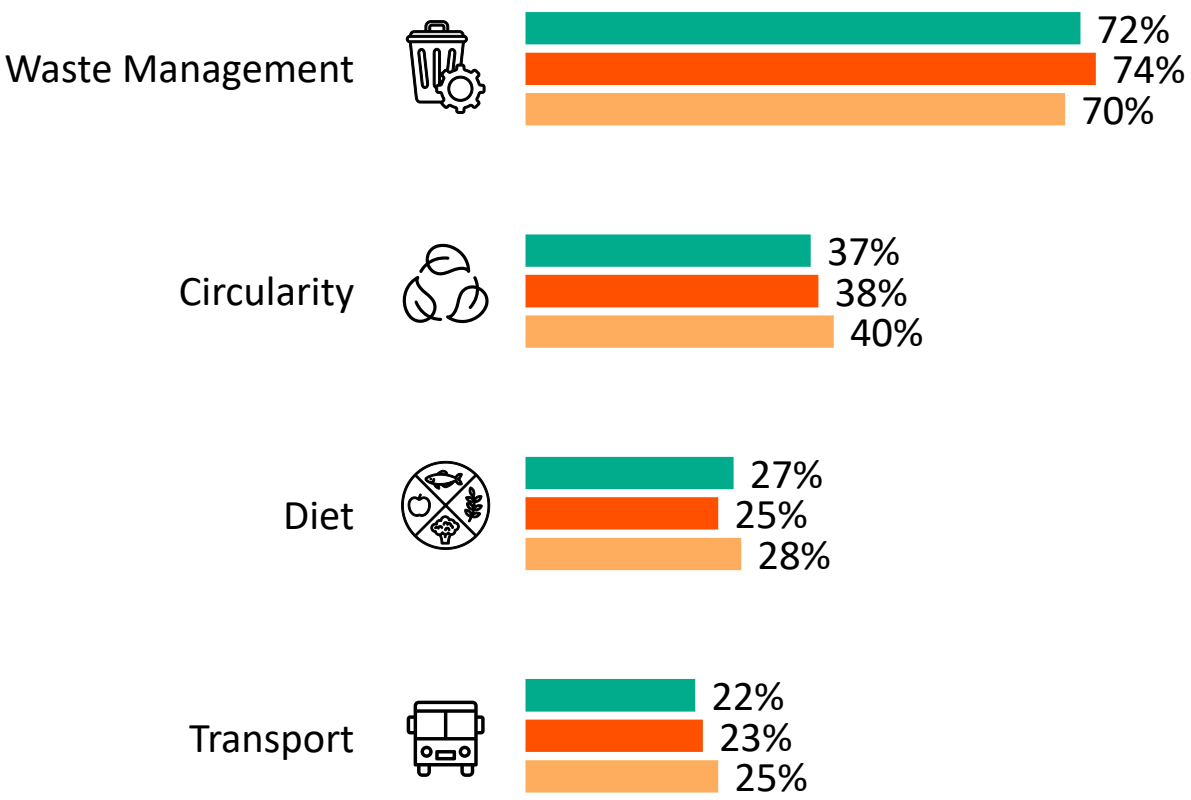


## SOCIAL SUSTAINABILITY COMMITMENT





# And those environmental behaviours are proving to be very steady...



2024 2025 2026

Q: When you have the opportunity, how often do you personally ...  
Base: 374 NB. Each respondent was shown 10 out of 27 actions at random  
Note: Definitions of the groupings were changed compared to 2025

Most importantly, despite the decreasing share of media, sustainability is still commercially relevant – as it still drives both adoption and rejection



REJECTION

53%



Versus 52% last year

ADOPTION

74%



Versus 72% last year

2.

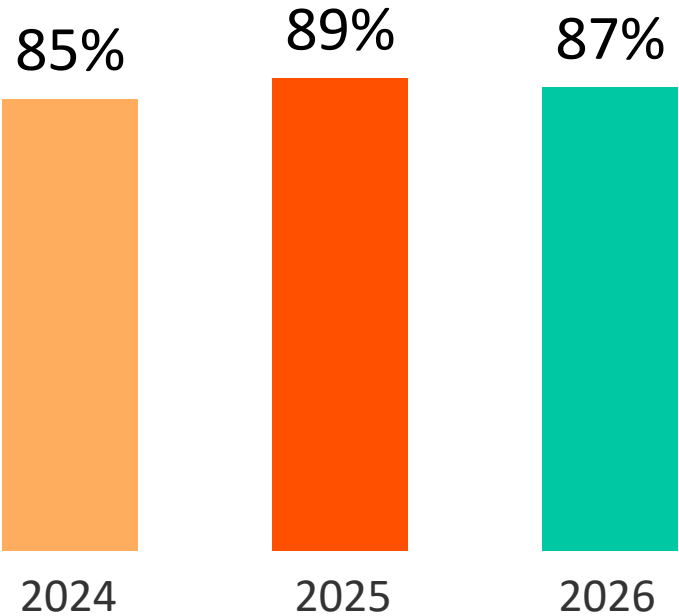
How are New Zealand businesses turning up?





# It's clear that New Zealanders expectations of business actions remain as clear as always

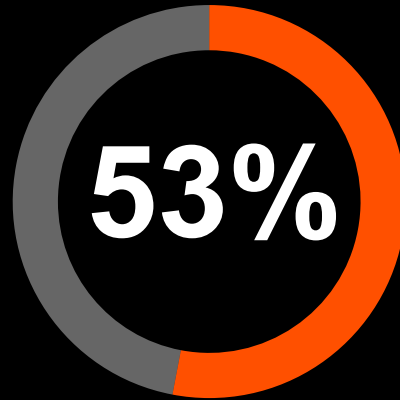
Businesses should take responsibility for their environmental / social impact



**Taking visible  
consumer action is  
imperative**

**Because silence isn't  
neutral - it's  
interpreted...  
as you're doing  
nothing or hiding**

**If a brand does not mention  
what it is doing to address  
societal issues;**



**I will assume the brand  
is doing nothing, or  
hiding something**

Source: 2025 Edelman Trust Barometer Special  
Report: Brand Trust, From We to Me.



# In New Zealand, when businesses speak up, it's not trusted or understood which means that they are not seen as doing enough



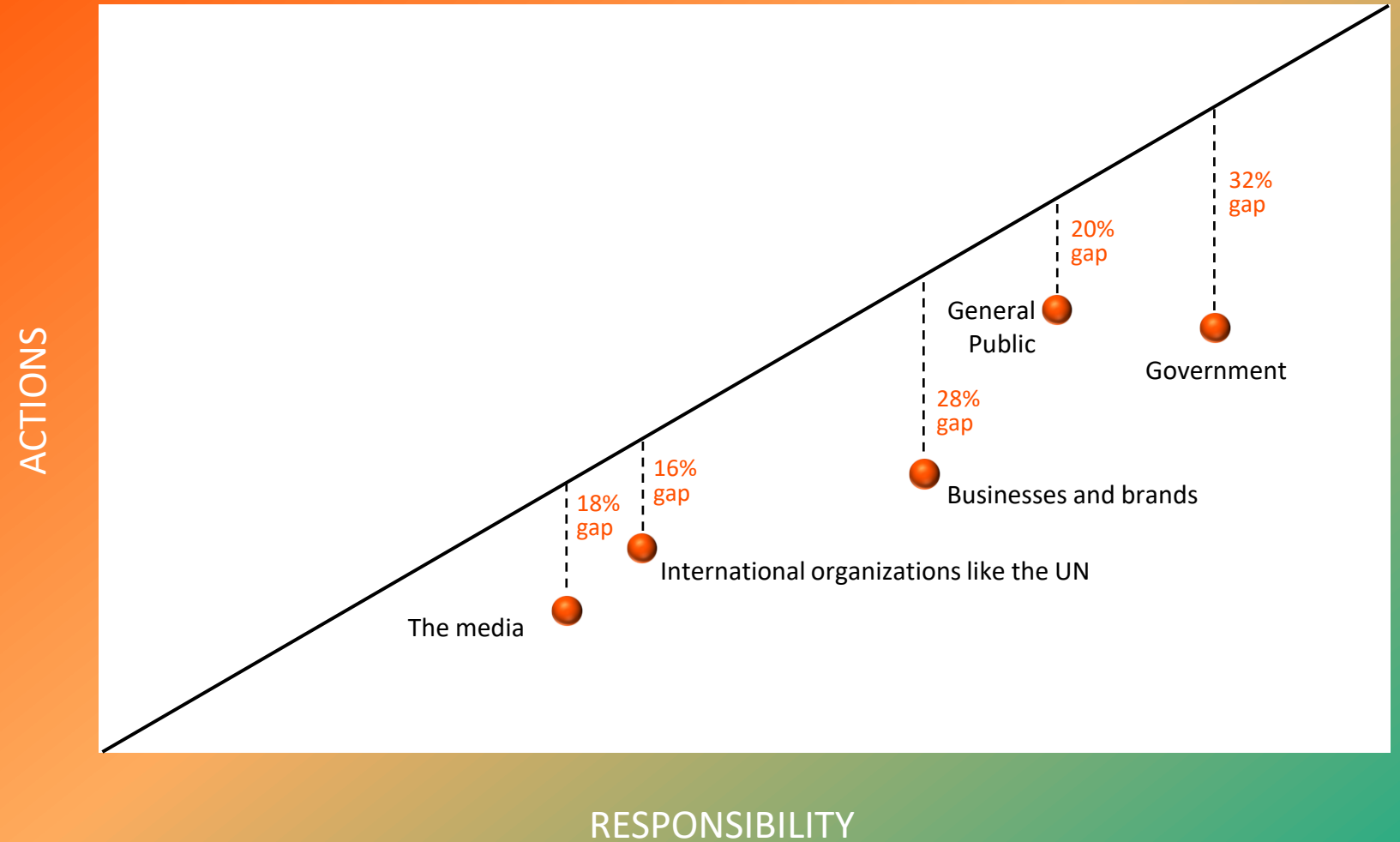
■ 2026 ■ 2025



Alongside government, businesses and brands are the biggest underperformers against expectations.

And crucially, this has not shifted since 2024

## CLIMATE CHANGE AND ENVIRONMENTAL ISSUES IN NEW ZEALAND



And businesses lack of delivery on social challenges is equally telling – and is again showing no change

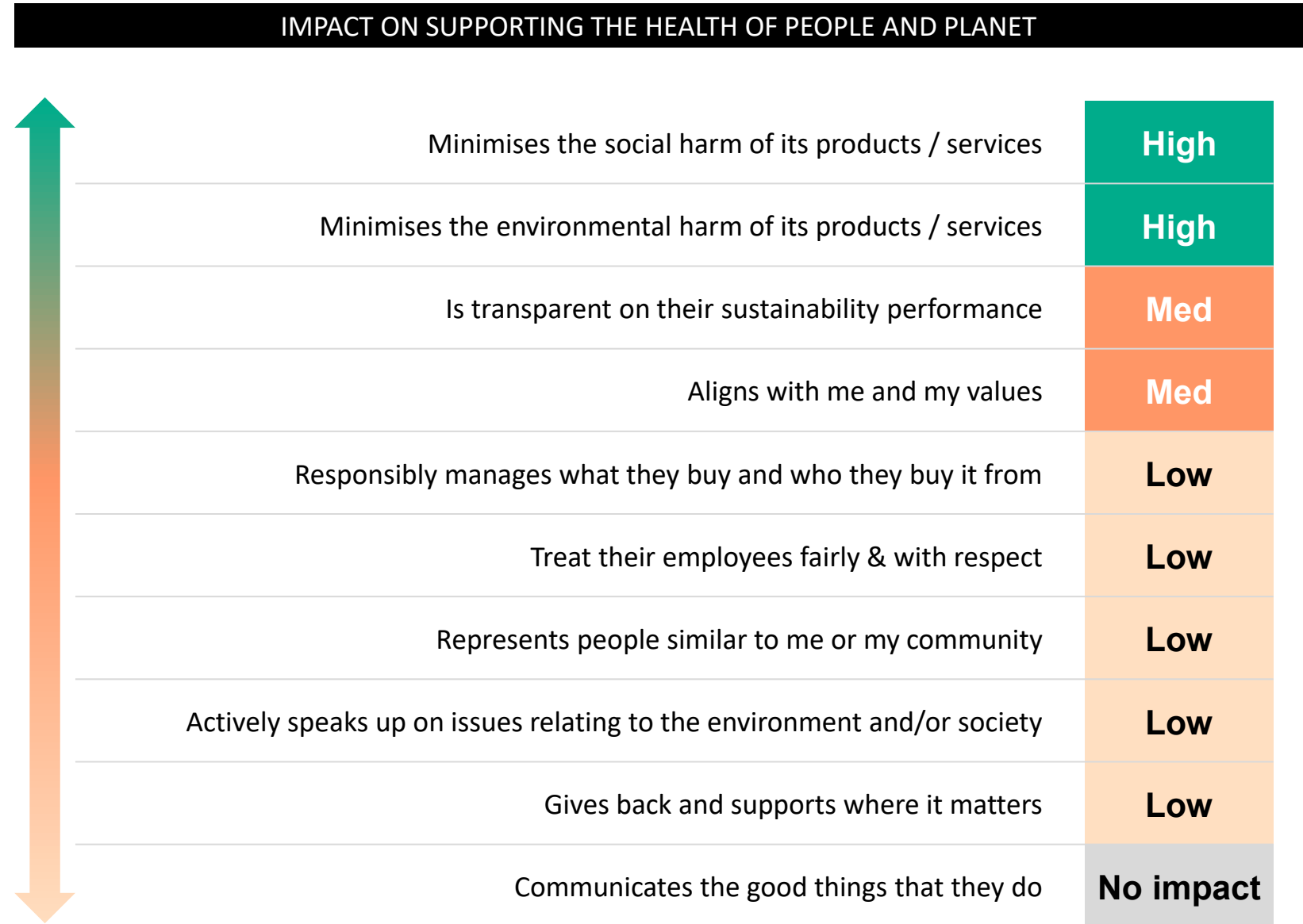
COMMUNITY AND SOCIAL CHALLENGES INCLUDING INEQUALITY, DISCRIMINATION AND RESILIENCE IN NEW ZEALAND



# We measured indepth the perceptions of a range of major New Zealand businesses and brands

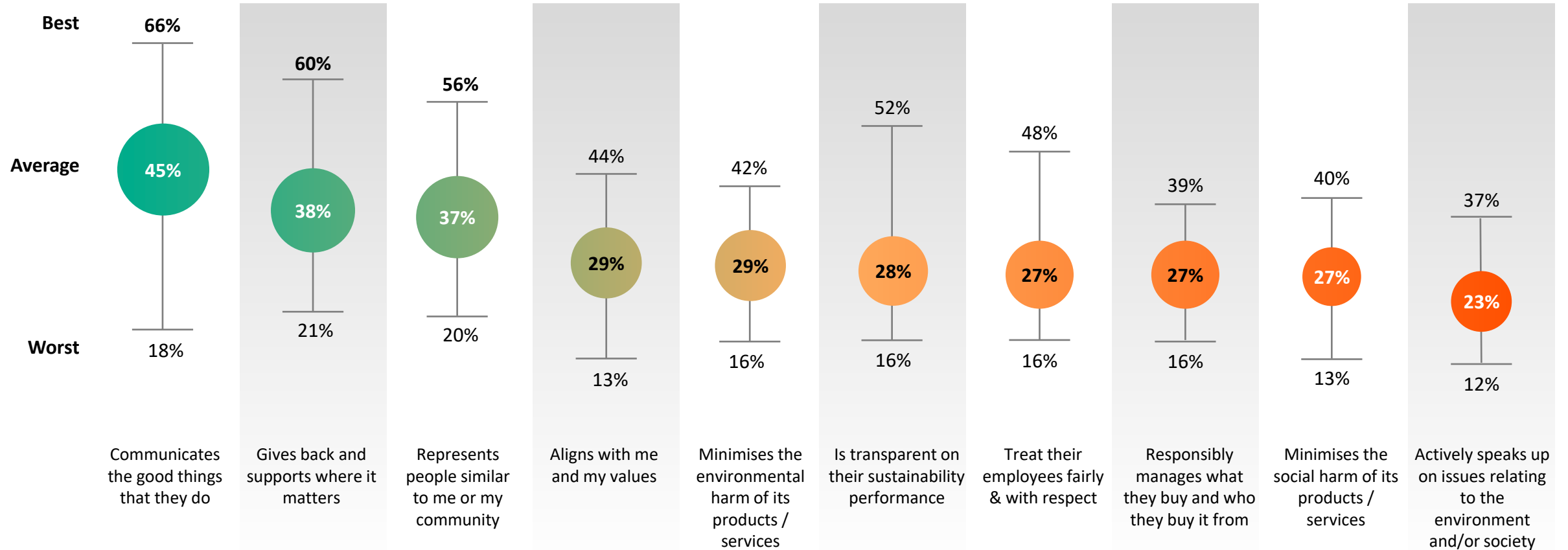
				
				
				
				

As in 2025, actions are more impactful than talk, particularly harm minimisation



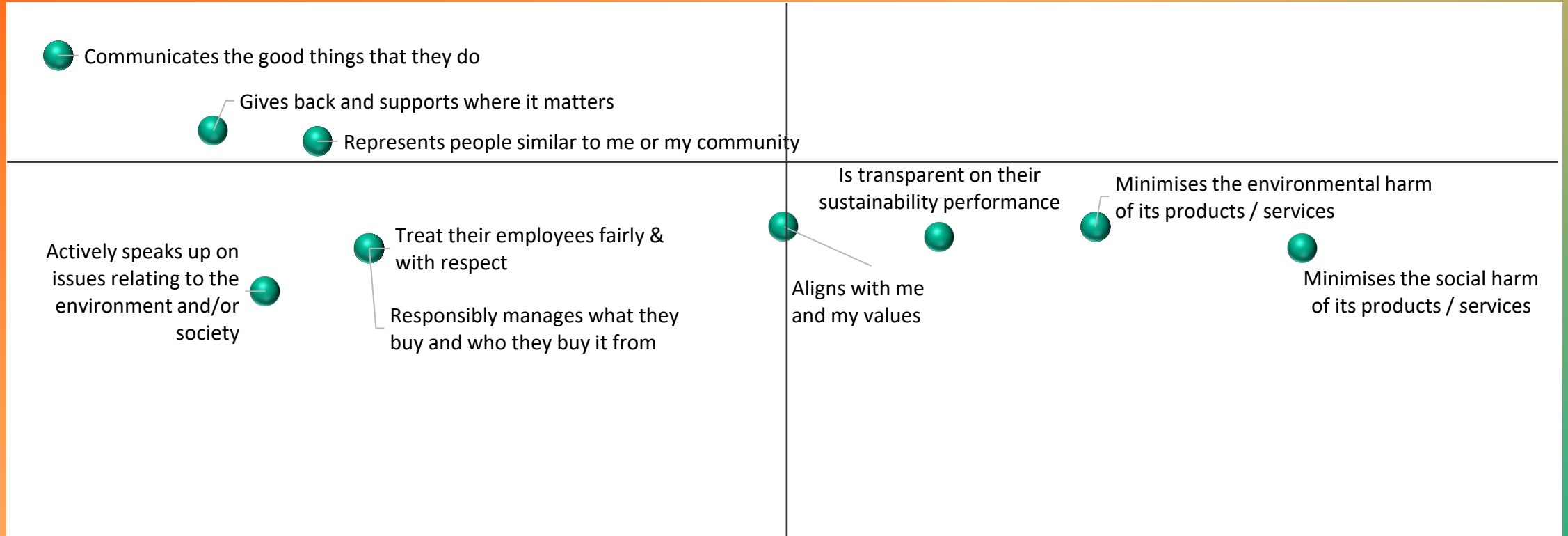
# Many of New Zealand's largest businesses are struggling, with even the strongest performers recognised as such by only 60% of New Zealanders

## % AGREE THAT BUSINESSES ARE PERFORMING



# Direct and transparent action represents the key opportunities to improve perceptions of major brands in New Zealand

PERFORMANCE AMONG NZ BUSINESSES



IMPACT UPON THE HEALTH OF PEOPLE AND PLANET

3.

How does sustainability vary across generations?



# We will be looking through the lens of five generations



Gen Z

18-29 years old



Millennials

30-45 years old



Gen X

46-61 years old



Boomers































62-80 years old





























Post war

81-98 years old

# There are some notable patterns by generation regarding **social issues**

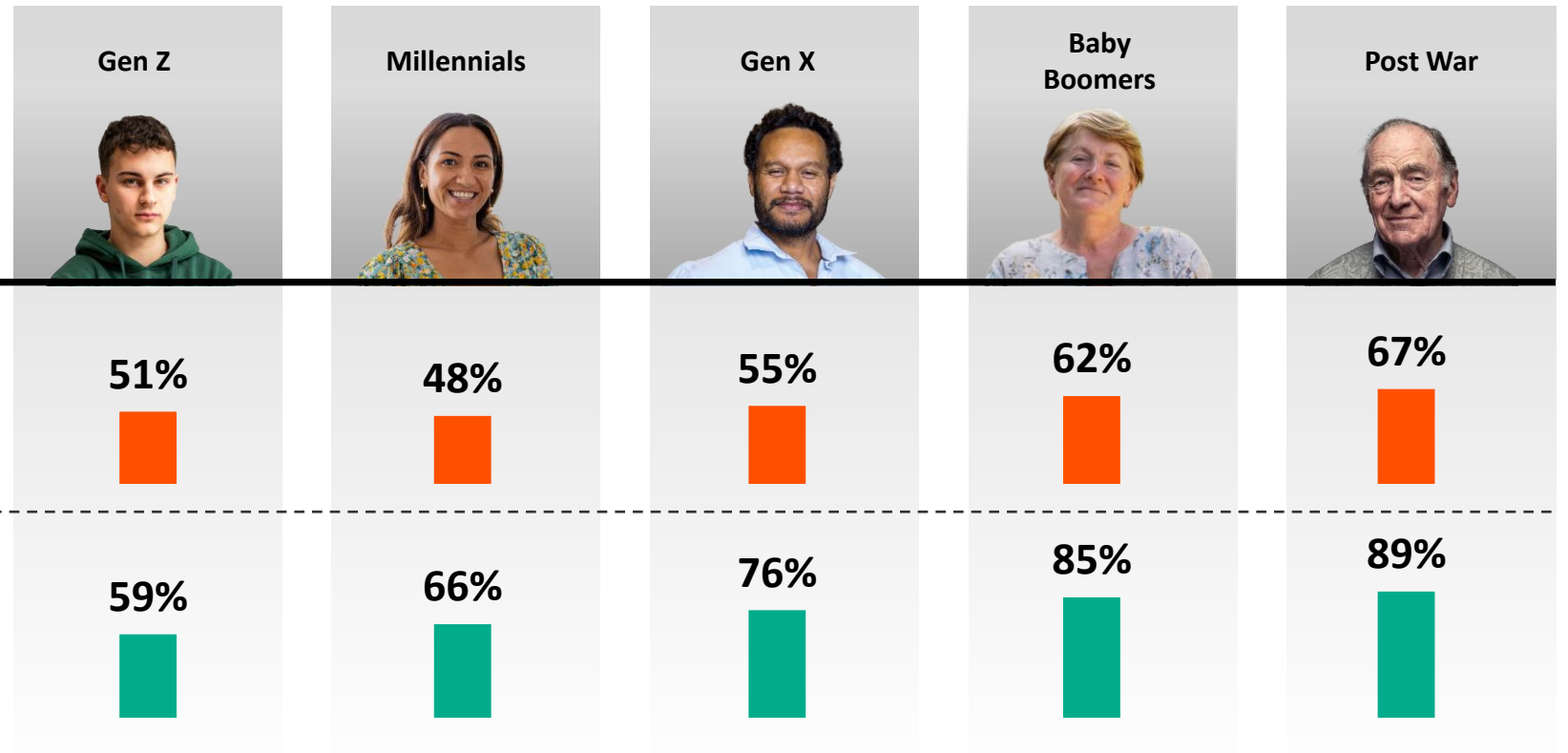
Gen Z	Millennials	Gen X	Baby Boomers	Post War
				
 Lack of jobs with a sufficient living wage <b>66%</b>	 The cost of living <b>72%</b>	 The cost of living <b>76%</b>	 Protection of children from mental, physical and sexual abuse <b>74%</b>	 Drugs / alcohol addiction in society <b>81%</b>
 Drugs / alcohol addiction in society <b>60%</b>	 Protection of children from mental, physical and sexual abuse <b>62%</b>	 Protection of children from mental, physical and sexual abuse <b>65%</b>	 The impact of Social Media <b>71%</b>	 Not having access to good, affordable healthcare <b>78%</b>
 Availability of affordable housing <b>60%</b>	 Not having access to good, affordable healthcare <b>60%</b>	 Violence in society <b>64%</b>	 Not having access to good, affordable healthcare <b>71%</b>	 Protection of children from mental, physical and sexual abuse <b>77%</b>
 The cost of living <b>59%</b>	 Violence in society <b>57%</b>	 Not having access to good, affordable healthcare <b>64%</b>	 Caring for the ageing population <b>68%</b>	 Political extremism <b>76%</b>
 The state of the economy <b>57%</b>	 The state of the economy <b>57%</b>	 Caring for the ageing population <b>62%</b>	 Violence in society <b>66%</b>	 Violence in society <b>76%</b>

# Meanwhile there is far more consistency across generations regarding **environmental concerns**

Gen Z	Millennials	Gen X	Baby Boomers	Post War
 <p><b>51%</b> The impact of climate change</p>	 <p><b>53%</b> Extreme weather events (flooding, fires, drought)</p>	 <p><b>58%</b> Microplastics in the environment and food sources</p>	 <p><b>63%</b> Pollution of lakes, rivers, and seas</p>	 <p><b>80%</b> Pollution of lakes, rivers, and seas</p>
 <p><b>51%</b> Microplastics in the environment and food sources</p>	 <p><b>52%</b> Pollution of lakes, rivers, and seas</p>	 <p><b>57%</b> Pollution of lakes, rivers, and seas</p>	 <p><b>61%</b> Managing our waste including recycling</p>	 <p><b>77%</b> Microplastics in the environment and food sources</p>
 <p><b>50%</b> Loss of biodiversity on land and in marine environments</p>	 <p><b>48%</b> Loss of biodiversity on land and in marine environments</p>	 <p><b>54%</b> Extreme weather events (flooding, fires, drought)</p>	 <p><b>61%</b> Microplastics in the environment and food sources</p>	 <p><b>66%</b> Extreme weather events (flooding, fires, drought)</p>
 <p><b>48%</b> Extreme weather events (flooding, fires, drought)</p>	 <p><b>47%</b> The impact of climate change</p>	 <p><b>52%</b> Loss of biodiversity on land and in marine environments</p>	 <p><b>58%</b> Protection and management of conservation land and water ways</p>	 <p><b>66%</b> Protection of native animals and plants</p>
 <p><b>44%</b> Protection and management of conservation land and water ways</p>	 <p><b>42%</b> Overconsumption (e.g. food, clothes, etc.)</p>	 <p><b>49%</b> Protection and management of conservation land and water ways</p>	 <p><b>54%</b> The level of renewable energy production</p>	 <p><b>59%</b> The impact of climate change</p>
 <p><b>44%</b> Overconsumption (e.g. food, clothes, etc.)</p>				

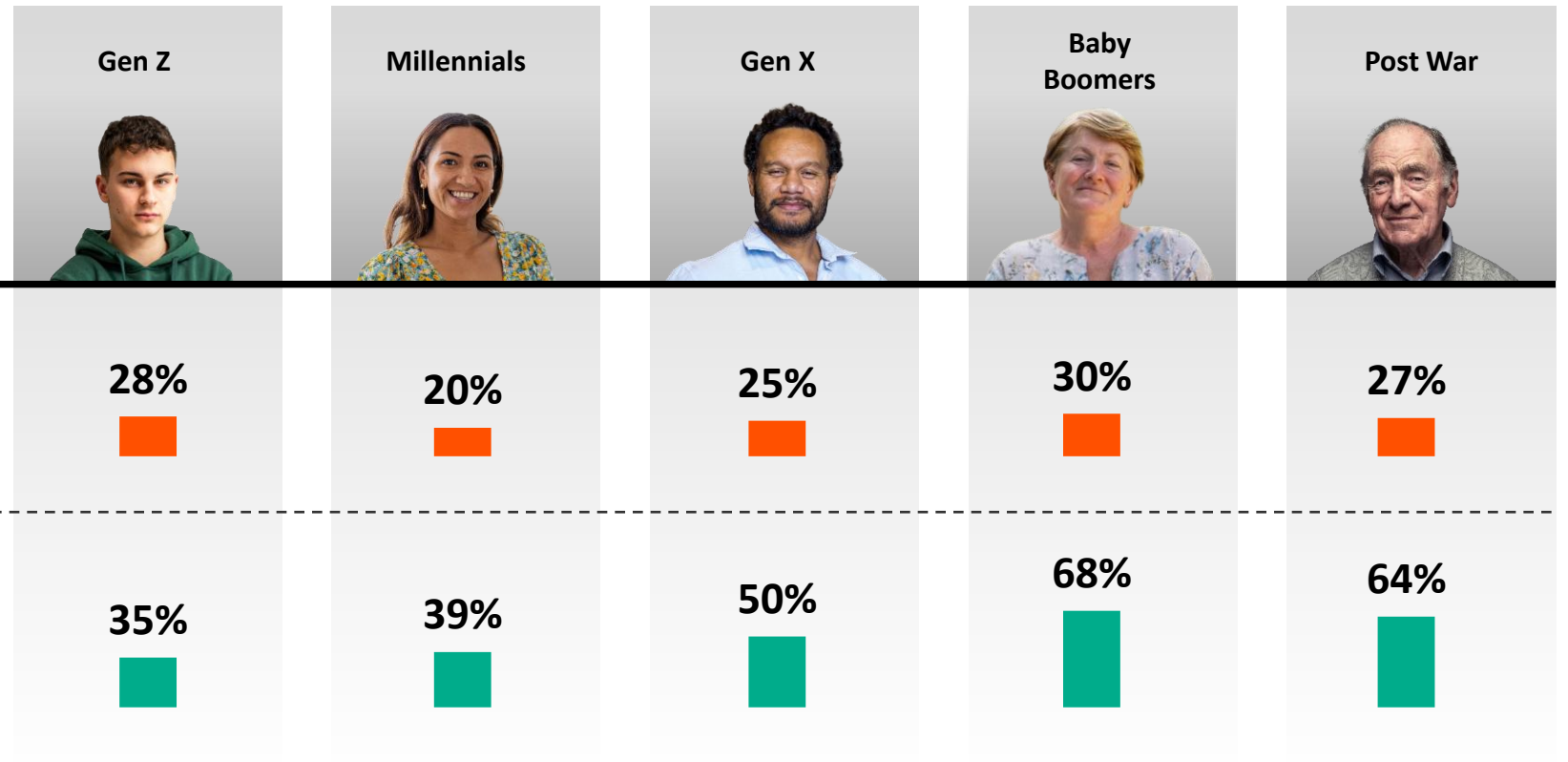
# Our emotional commitment to all types of sustainability increases as New Zealanders age

% OF NEW ZEALANDERS PASSIONATE / INTERESTED



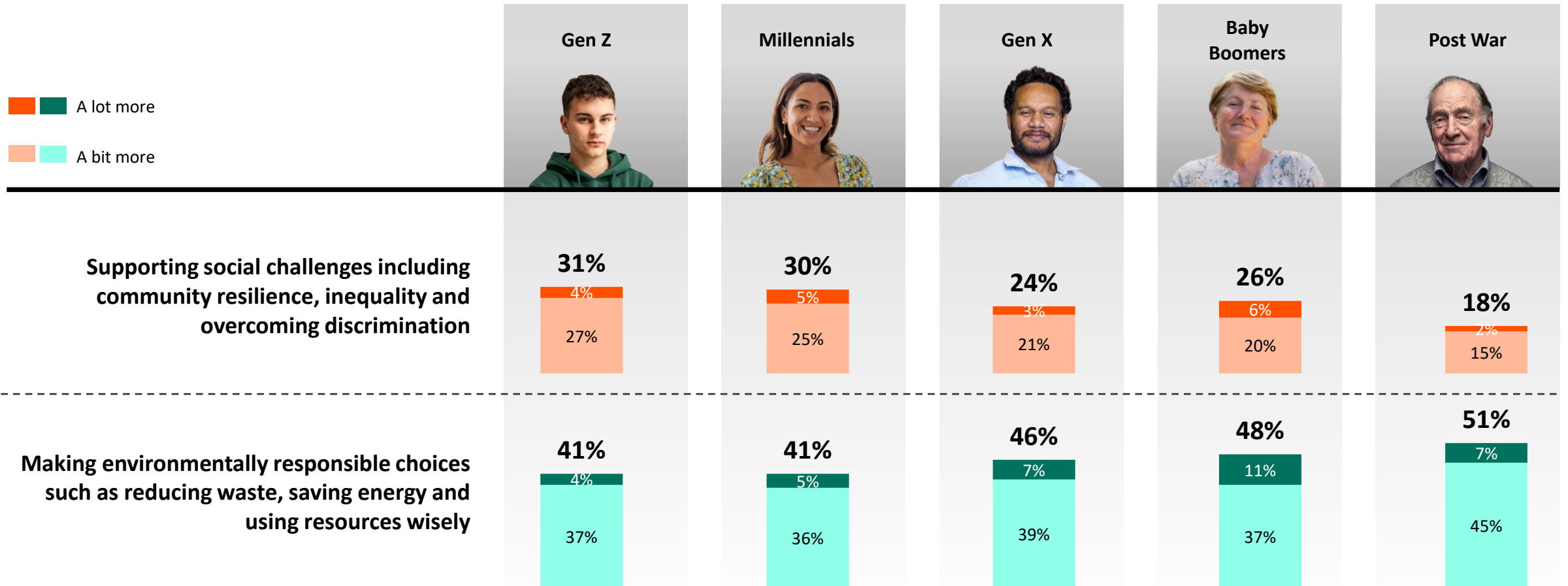
# While social action is more consistent across generations, taking environmental action does increase with age

## % OF NEW ZEALANDERS TAKING ACTION



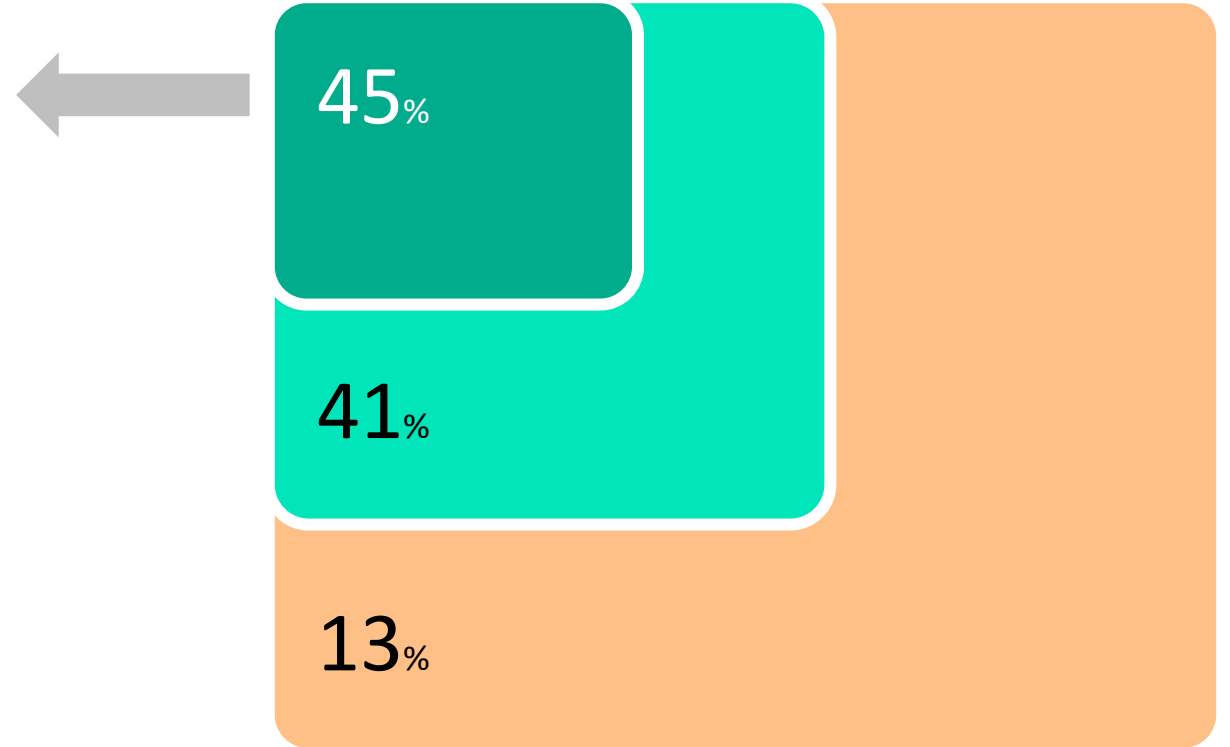
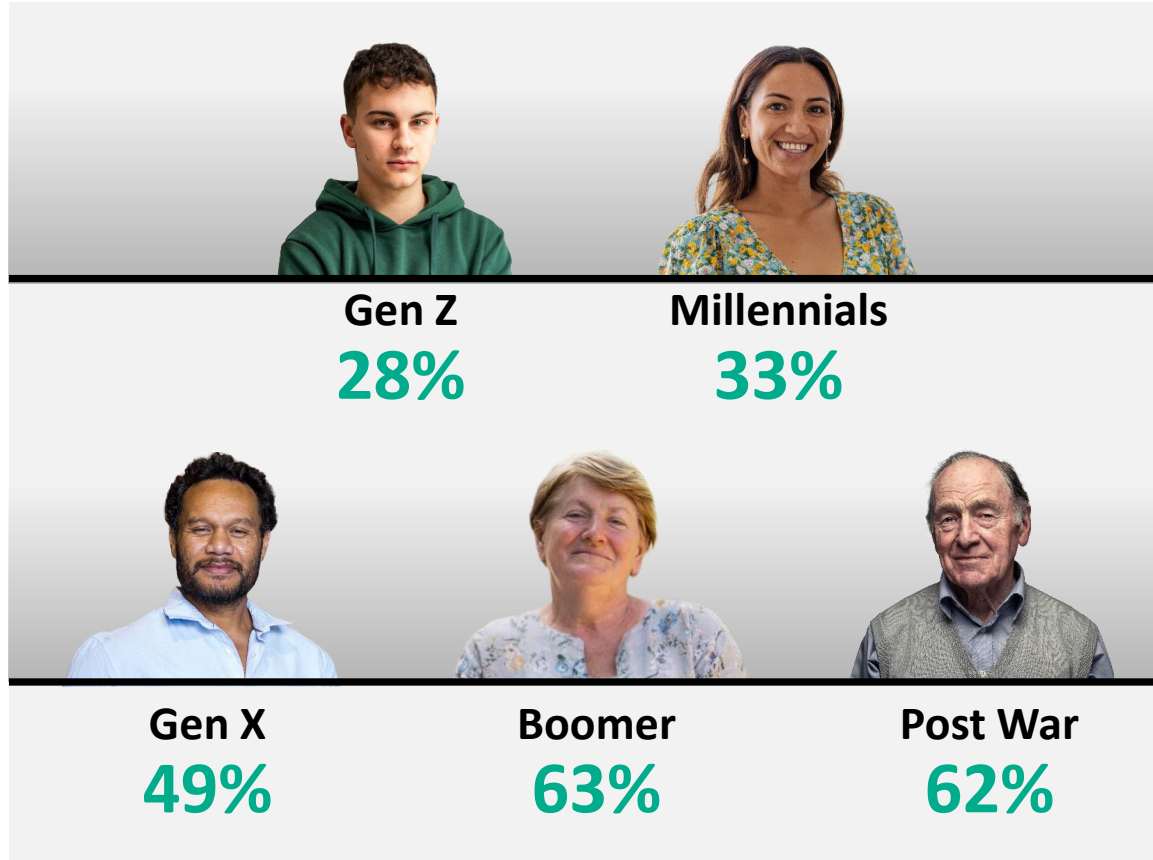
# However, younger generations are the most likely to increase their actions on social issues, while this is less the case regarding environmental issues

## % OF NEW ZEALANDERS EXPECTING TO DO MORE IN THE NEXT 12 MONTHS



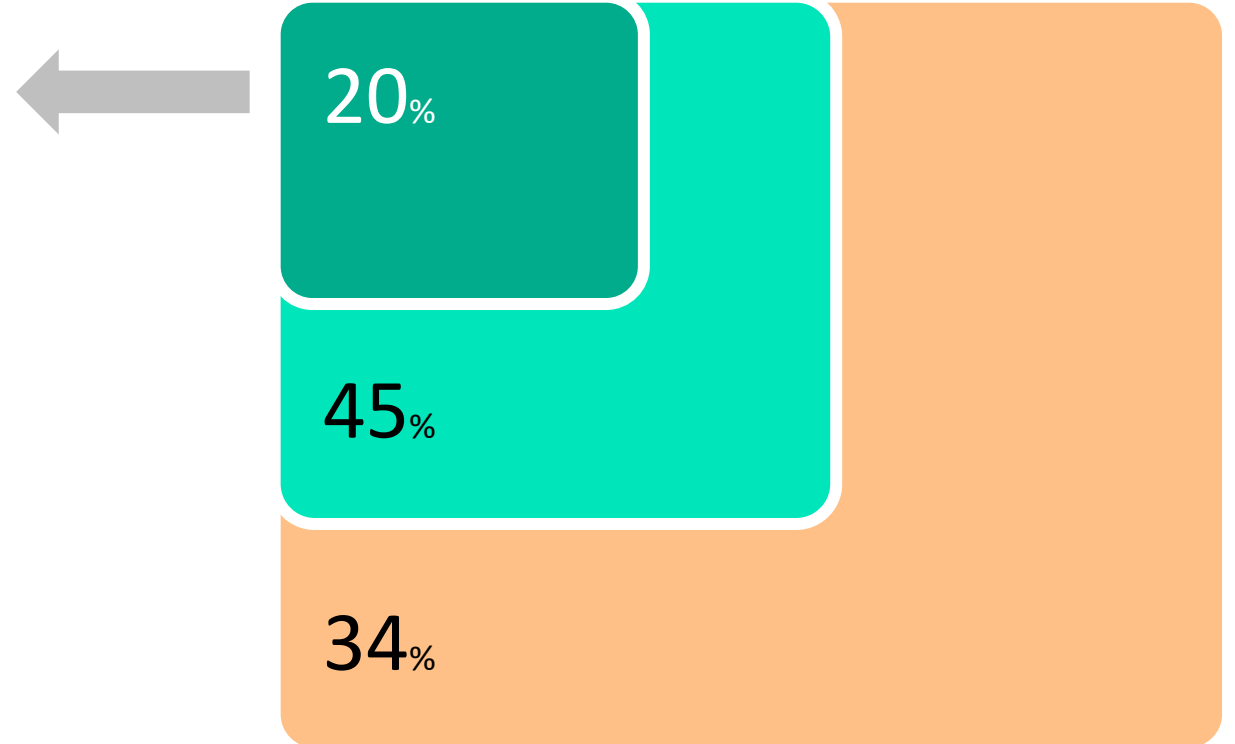
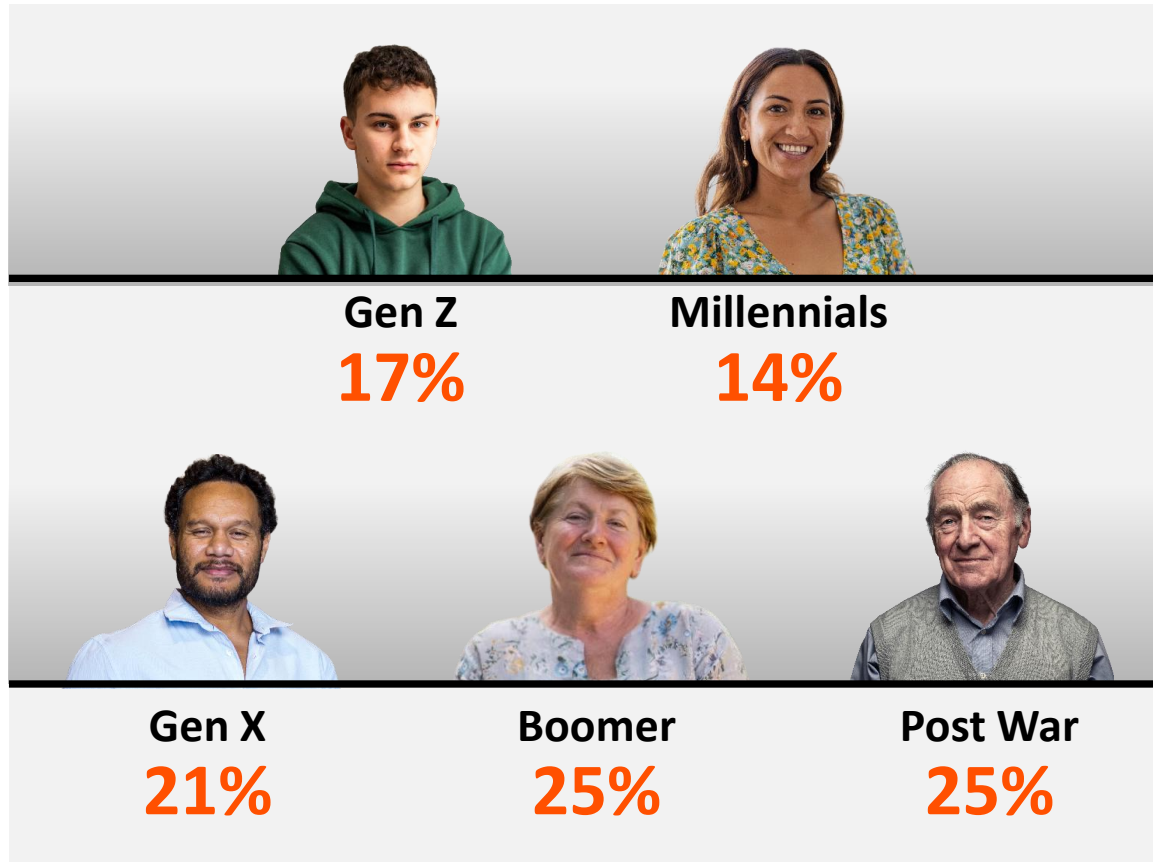
# By combining our feelings and our behaviours, younger generations are notably LESS committed to environmental sustainability

## ENVIRONMENTAL SUSTAINABILITY COMMITMENT

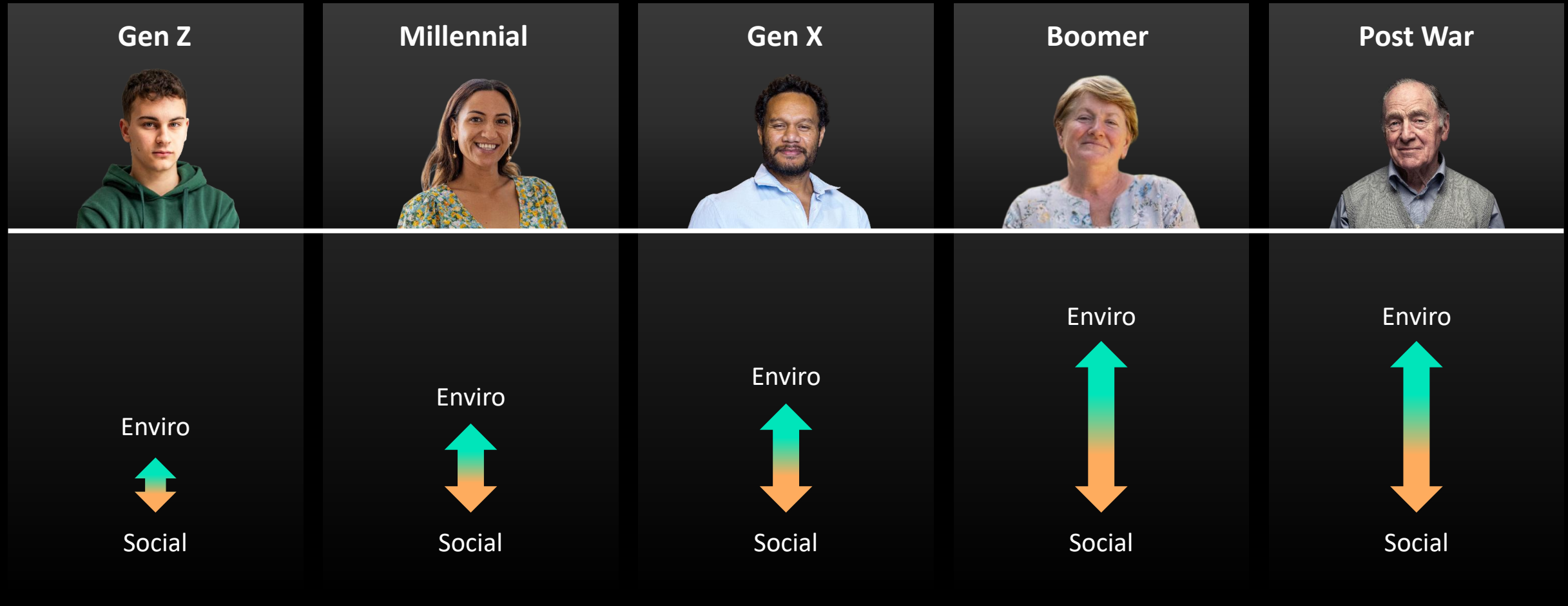


...and this is also true regarding commitment to **social issues** although the difference is far less

SOCIAL SUSTAINABILITY COMMITMENT



Gen Z is the generation for whom environmental and social commitment levels are equivalent; elsewhere, social commitment is notably lower



# A study analysing 495,000 online reviews also displayed a lower commitment level



Gen Z is less likely than older generations to mention environmental or social sustainability in hotel reviews.



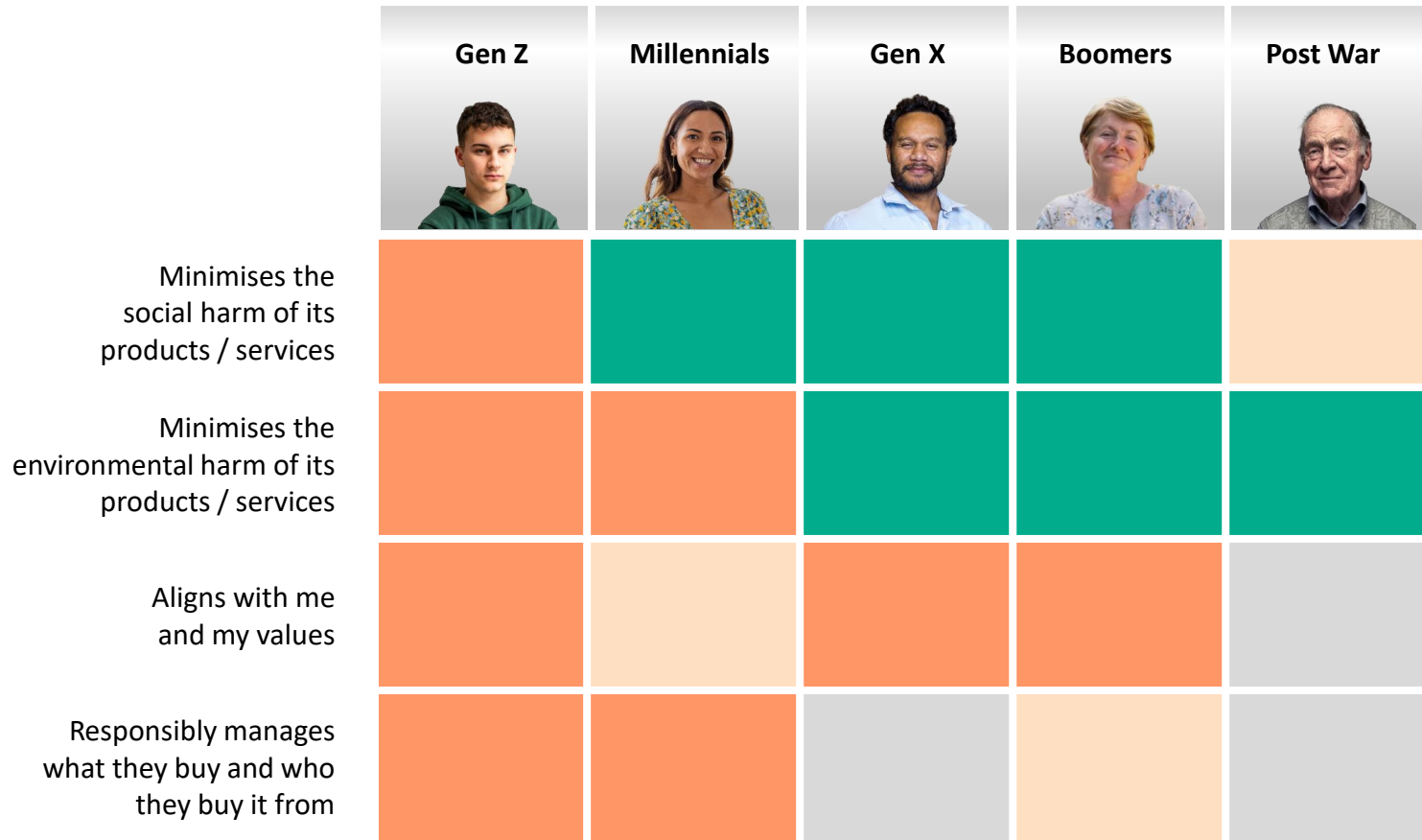
Environmental initiatives tend to generate more positive sentiment and higher ratings.



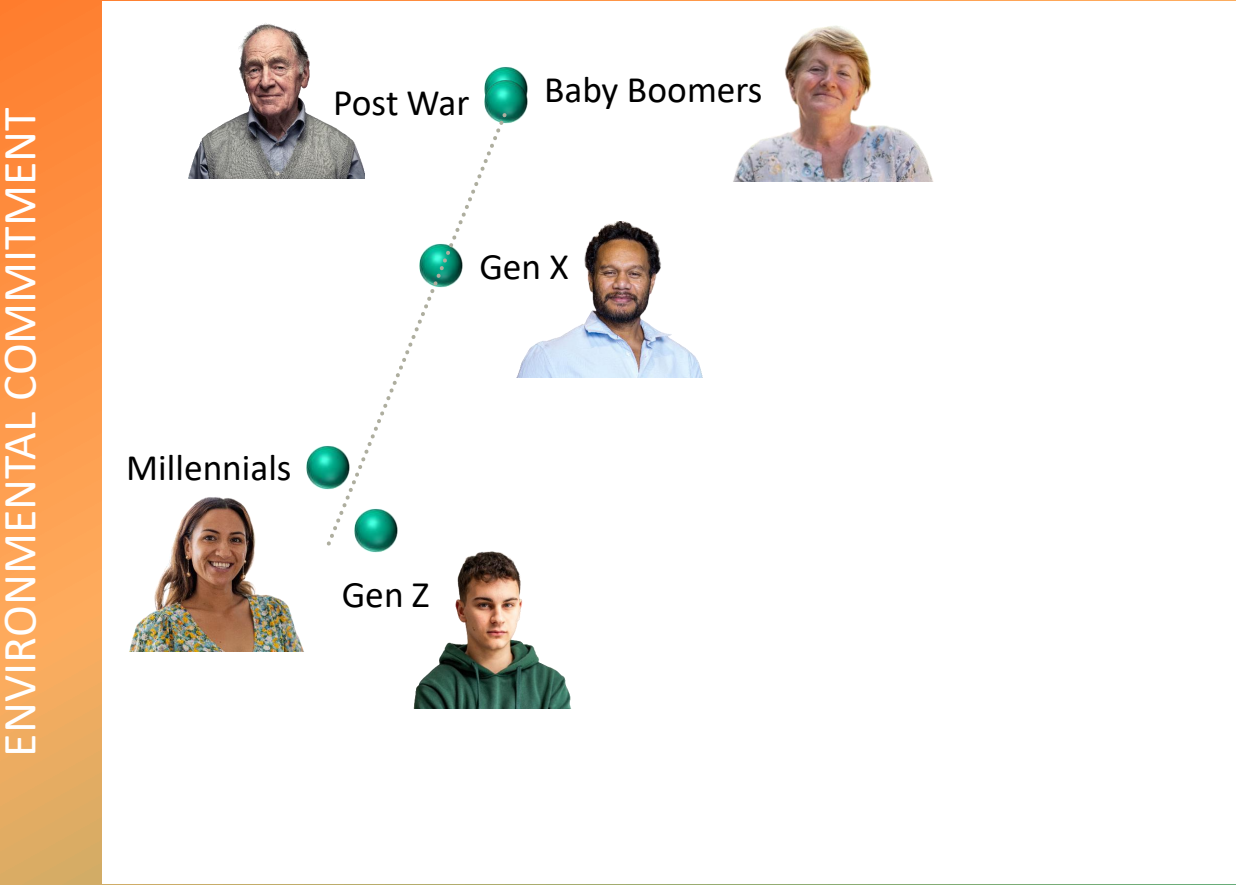
Whereas social and cultural sustainability issues elicit more critical responses.



# The singular focus on harm reduction is less a feature of what drives Gen Z's perception of New Zealand businesses

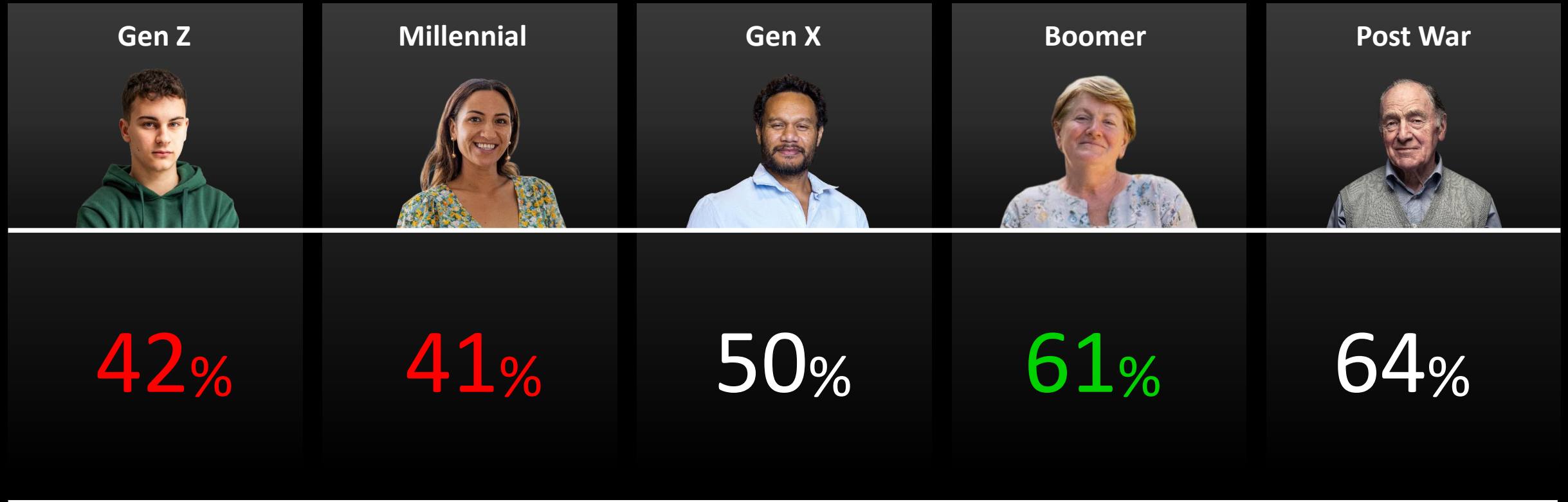


# There is a clear relationship between generation and level of environmental and social commitment



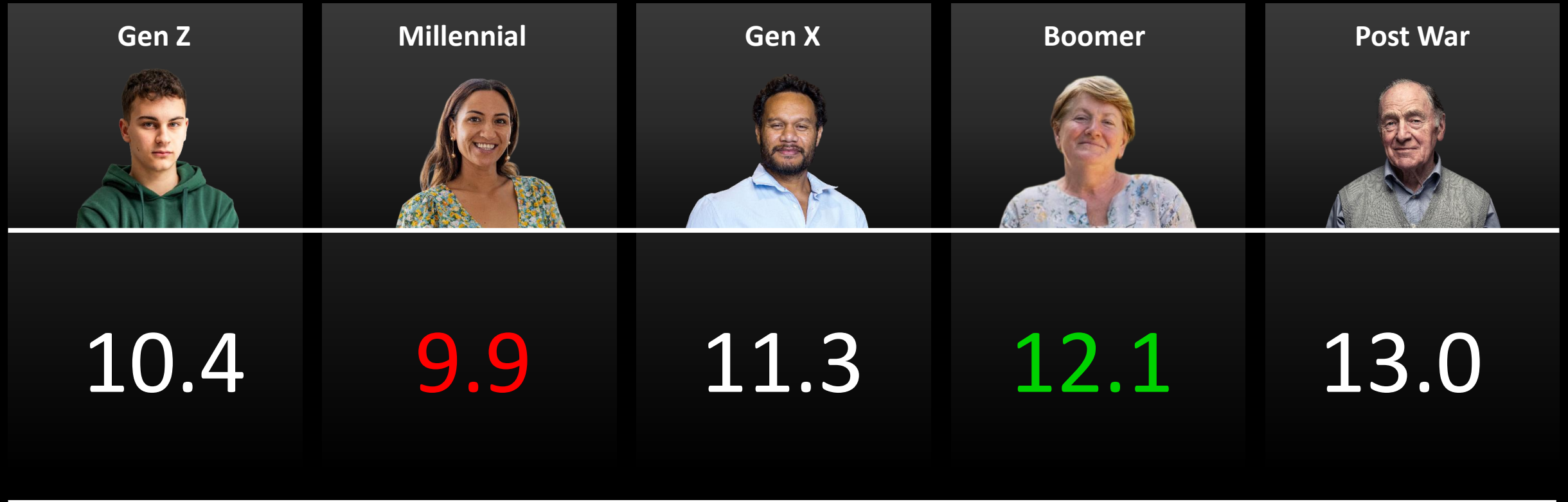
We see this same pattern repeated in the proportion of Conscious Consumers in each generation

PROPORTION OF CONSCIOUS CONSUMERS

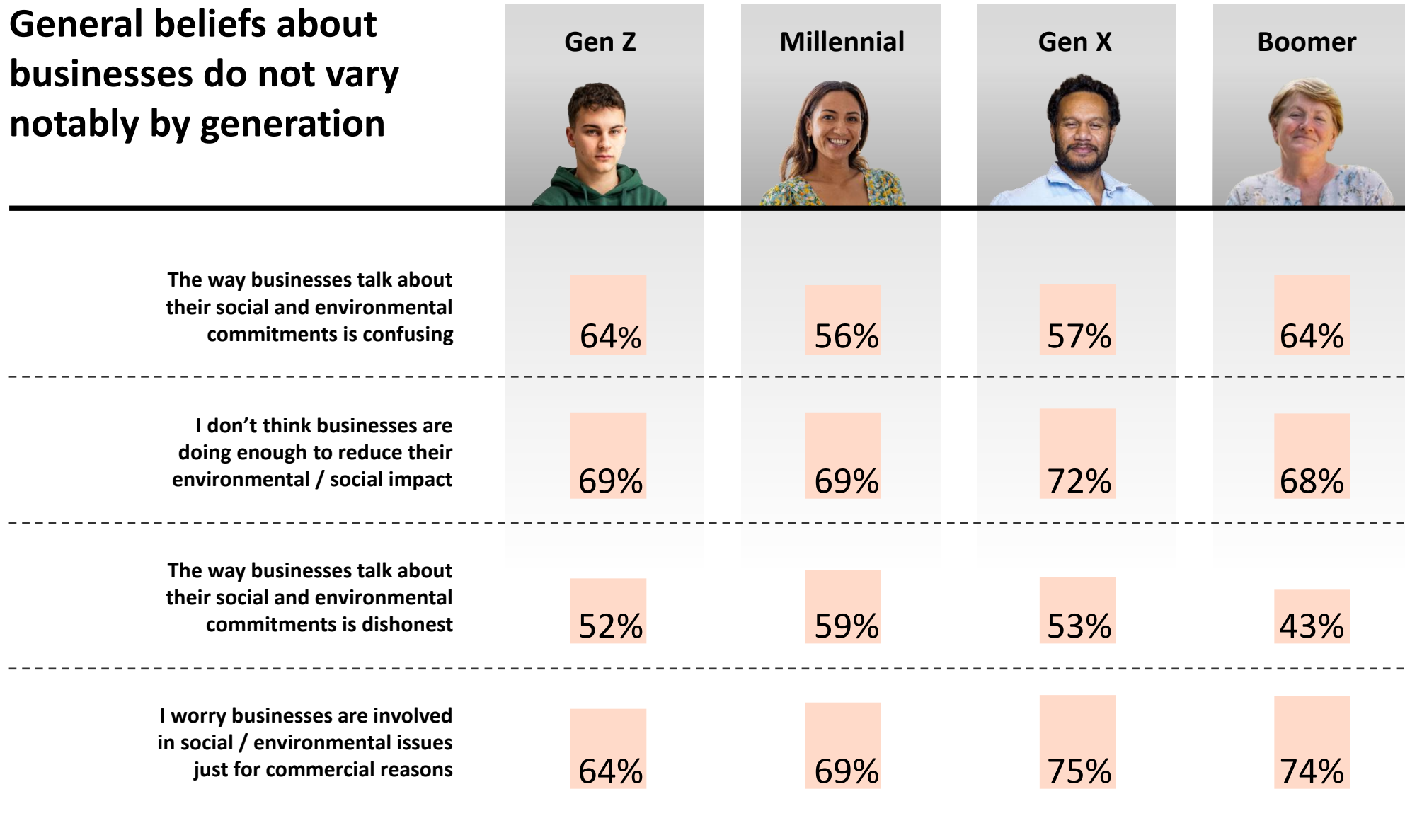


# Furthermore, we see that younger generations place importance on fewer issues

## AVERAGE NUMBER OF ISSUES OF CONCERN



# General beliefs about businesses do not vary notably by generation



## There are some defining and unique features of Gen Z



They are the only generation for whom **climate change** is the #1 environmental issue, and they share with Millennials a serious concern regarding **overconsumption**



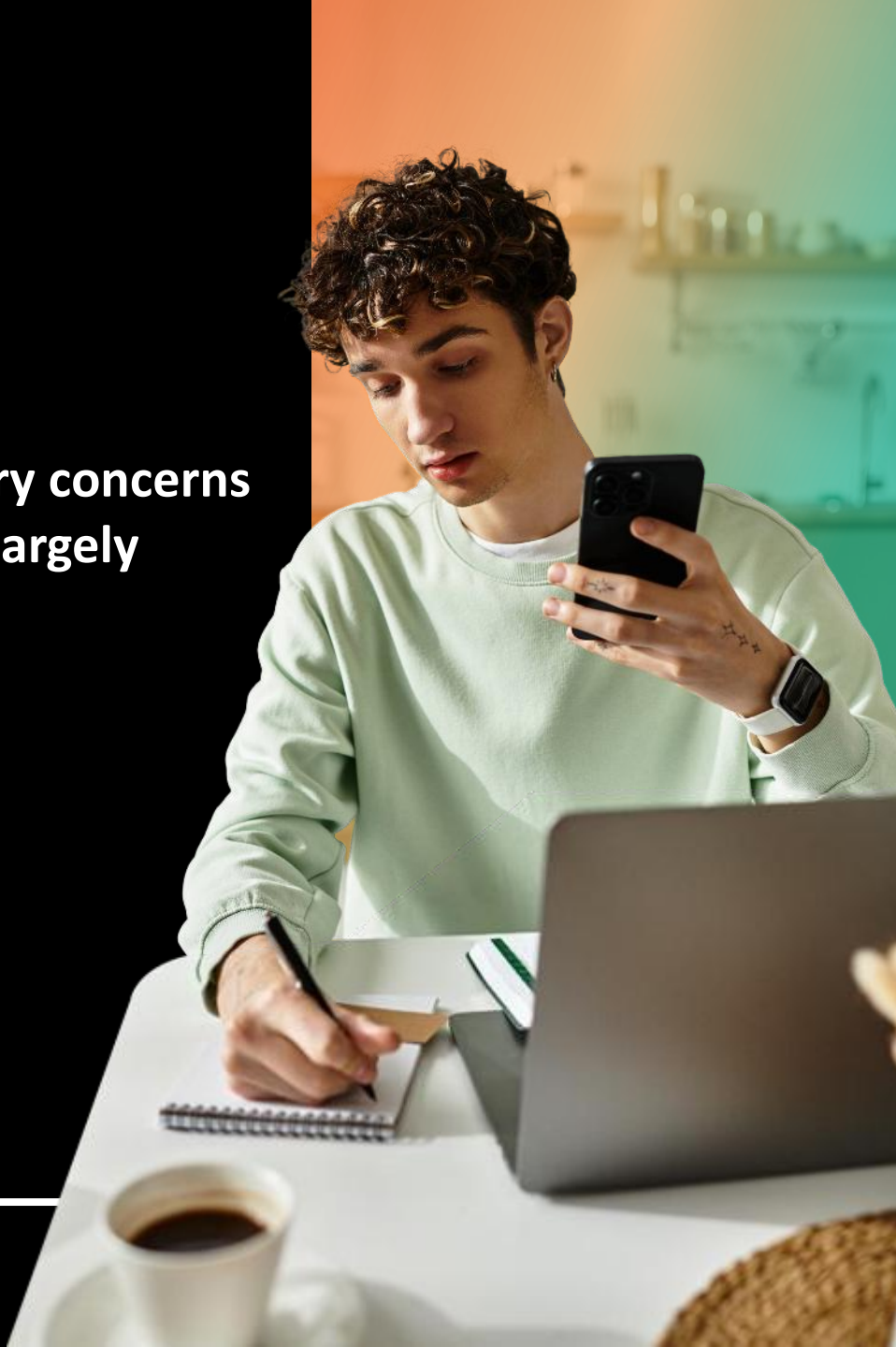
Gen Z is the most likely to feel **personally impacted** by issues relating to diversity, equality and inclusion (55%)



Gen Z is the generation for whom **environmental and social commitment levels are equivalent** (elsewhere, social commitment is notably lower)



**Gen Z's** primary concerns are clear and largely distinct



Living wage jobs



Drugs / alcohol addiction in society  
*(also a concern for the Post War generation)*



Housing affordability



The cost of living  
*(also a concern for Millennials and Gen X)*



State of the Economy  
*(also a concern for Millennials)*

It's less about harm reduction and more about **alignment** and **trust**



The singular focus on harm reduction is less a feature of what drives Gen Z's perception of New Zealand businesses

Instead, they look for **transparency** and **values alignment** before they look for harm minimisation



# Many of the behaviours that define Gen Z may be a function of life stage rather than enduring values



Gen Z are more likely to...

Buy free range / organic / non-intensively farmed products

Use public transport, bike or walk rather than a car

Use reusable containers when eating out (e.g. bring a keep-cup, use own food containers for takeaways, etc.)

Car-pool for work or regular journeys

Participate in local environmental or social initiatives (e.g. community clean-ups, tree planting, or neighbourhood programs, etc.)

Is this generational or lifestage?

Lifestage – it drops significantly with declining disposable income

Lifestage - this drops among Millennials, especially households with kids

Lifestage & generational - this behaviour drops among all except financially comfortable

Lifestage – it halves among Millennials - driven largely by the presence of kids

Generational – this drops regardless of Income or the presence of kids

Overall, however, younger generations are notably **LESS committed** to environmental sustainability

...and this is also true regarding commitment to social issues



However, Gen Z and Millennials are the most likely to increase their actions on social issues



We see lower commitment to action within Gen Z



# Gen Z's worldview is shaped by constant instability and overwhelming visibility



**Crises are constant and visible**



**Media and technology expose Gen Z to the world's extremes**



**The pathways that once promised stability no longer hold**

**Together, these forces create intense pressure to succeed and a pervasive sense of emotional overwhelm**

# Gen Z do actually care about sustainability, but distrust in the system can leave them feeling like they have little impact



  
**They care, but feel their individual impact is limited**

  
**They feel that the burden has been unfairly placed on individuals**

  
**Financial pressure makes sustainable choices harder**

  
**Low trust in corporations and other institutions shapes how they behave**

  
**Corporate sustainability claims rarely feel credible**

To matter to Gen Z, corporates must offer real transparency and emotional relief, and that goes beyond sustainability messaging

## Key issue:

Gen Z don't trust sustainability messaging. They're emotionally stretched and sceptical of corporate motives.



## Solution:

At a minimum deliver informative transparency

**Then build emotional assurance** by proving their values through visible, meaningful behaviour.

Trust is rebuilt through what you **do**, not what you describe.





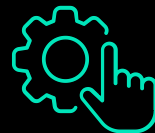
## In summary...



Sustainability has retained its power to drive purchase behaviour, even as it becomes one of many competing conversations



It is however a more mature and complex arena – so choose wisely your areas of impact to own. These must make sense for your brand, your category, and your customers



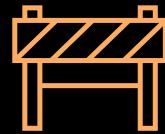
And execute authentically as the level of disbelief that New Zealand businesses are doing enough to reduce environmental and social harm remains overwhelming



## In summary...



For all New Zealanders, actions are more impactful than talk, particularly harm minimisation



Focus on helping overcome barriers for consumers – competing priorities, affordability, resourcing and perceived impact



Understand your target market or audience's key generational issues, priorities and perception drivers



## In summary...



Looking specifically at Gen Z, these represent both your current and future market and, executionally, your biggest challenge - so design for them appropriately



Some clear guidelines for authentically connecting with Gen Z

- Strive for honesty rather than perfection – Gen Z don't expect brands to be flawless
- Visible, meaningful actions – give something up or take a risk for the greater good
- Acknowledge systemic realities – not implying individuals / consumers alone can fix them
- Emotion-first communication – that delivers some form of emotional assurance
- Consistency across behaviour, and communications – proving sincerity over time
- Information transparency – explaining what you're doing, why, the trade-offs involved

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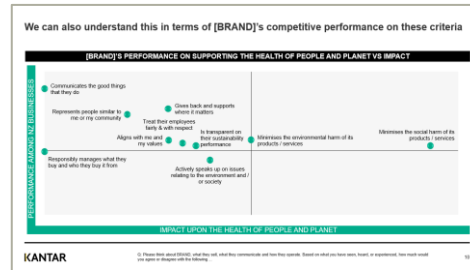
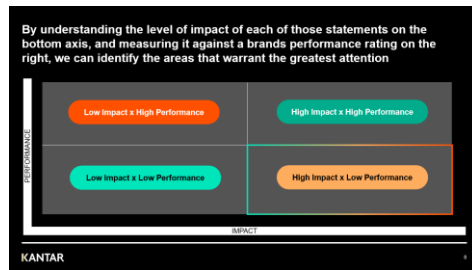
# Better Futures Brand Reports

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 New Zealand brands.



AA Insurance	MITRE 10
AIR NEW ZEALAND	NEW WORLD
bnz	noel leeming
Coca-Cola	SILVER FERN FARMS
Fonterra Dairy for life	Spark <sup>nz</sup>
genesis	Tegel
iag	the warehouse
LION	TOYOTA
McDonald's	Woolworths
Meridian.	ENERGY