

**New Zealanders' attitudes &
behaviours towards**

CLIMATE CHANGE

IPSOS GLOBAL ADVISOR

GAME CHANGERS



Background

The Ipsos Global Advisor Survey is conducted globally (around 30 markets) on a regular basis. It focuses on the most important issues of the day, and recent topics covered have ranged from COVID-19 to mental health.

The current survey looks at attitudes and behaviours towards climate change and the environment.

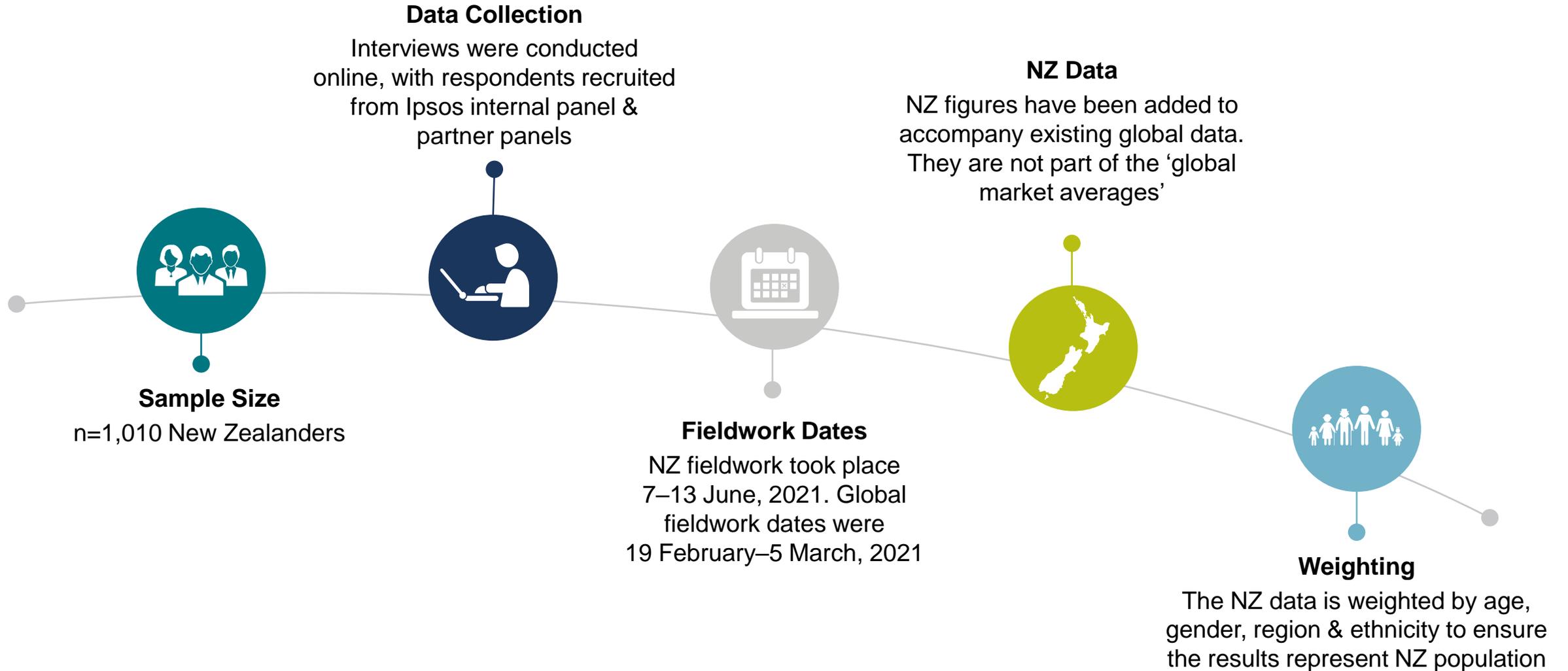
Specifically, this report covers:

- Attitudes surrounding governments' initiatives to combat climate change
- The role of governments, businesses and individuals in addressing issues surrounding climate change
- Opinions of whether climate change should be prioritised as we recover from the COVID-19 pandemic
- Changes in behaviour once COVID restrictions ease
- Behaviours people are likely to adopt in order to reduce their contribution to climate change





Methodology



What is the plan?

Who should act to combat climate change?



A Global Market Average of just **31%** agree their government **has a clear plan in place** for how the government, businesses & people are going to work together to tackle climate change.

34% disagree.

Summary: Combatting climate change

Combatting climate change is perceived as a shared responsibility. Compared to global average, there is a lower perceived urgency about 'acting now' amongst New Zealanders



Globally, **65%** say that if **their national government** does not act now to combat climate change, it will be failing its citizens.

57% of New Zealanders hold this view (Australia **63%**).



Globally, **68%** say that if **businesses** do not act now to combat climate change, then they are failing their employees and customers.

60% of New Zealanders hold this view (Australia **69%**).

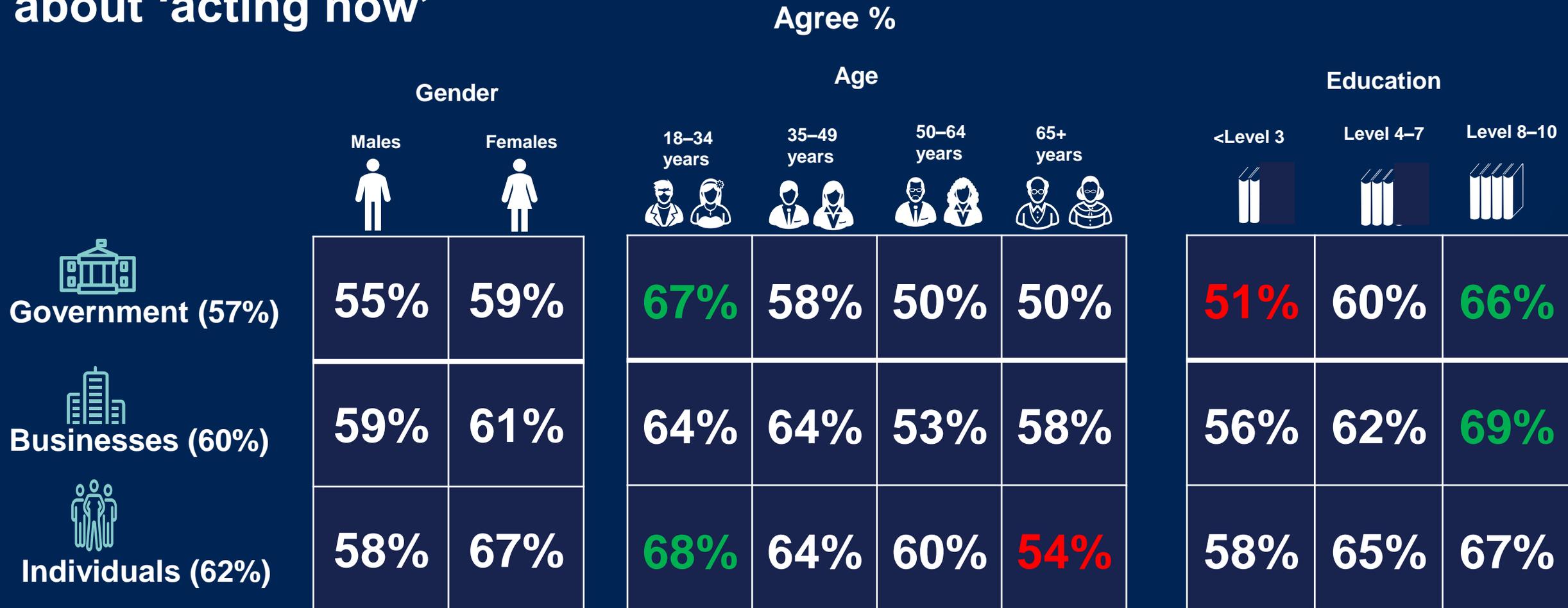


Globally, **72%** agree that if **individuals** do not act now to combat climate change, they will be failing future generations.

62% of New Zealanders hold this view (Australia **69%**).



In New Zealand, women, the younger age group & those with higher education levels feel a greater sense of urgency about 'acting now'

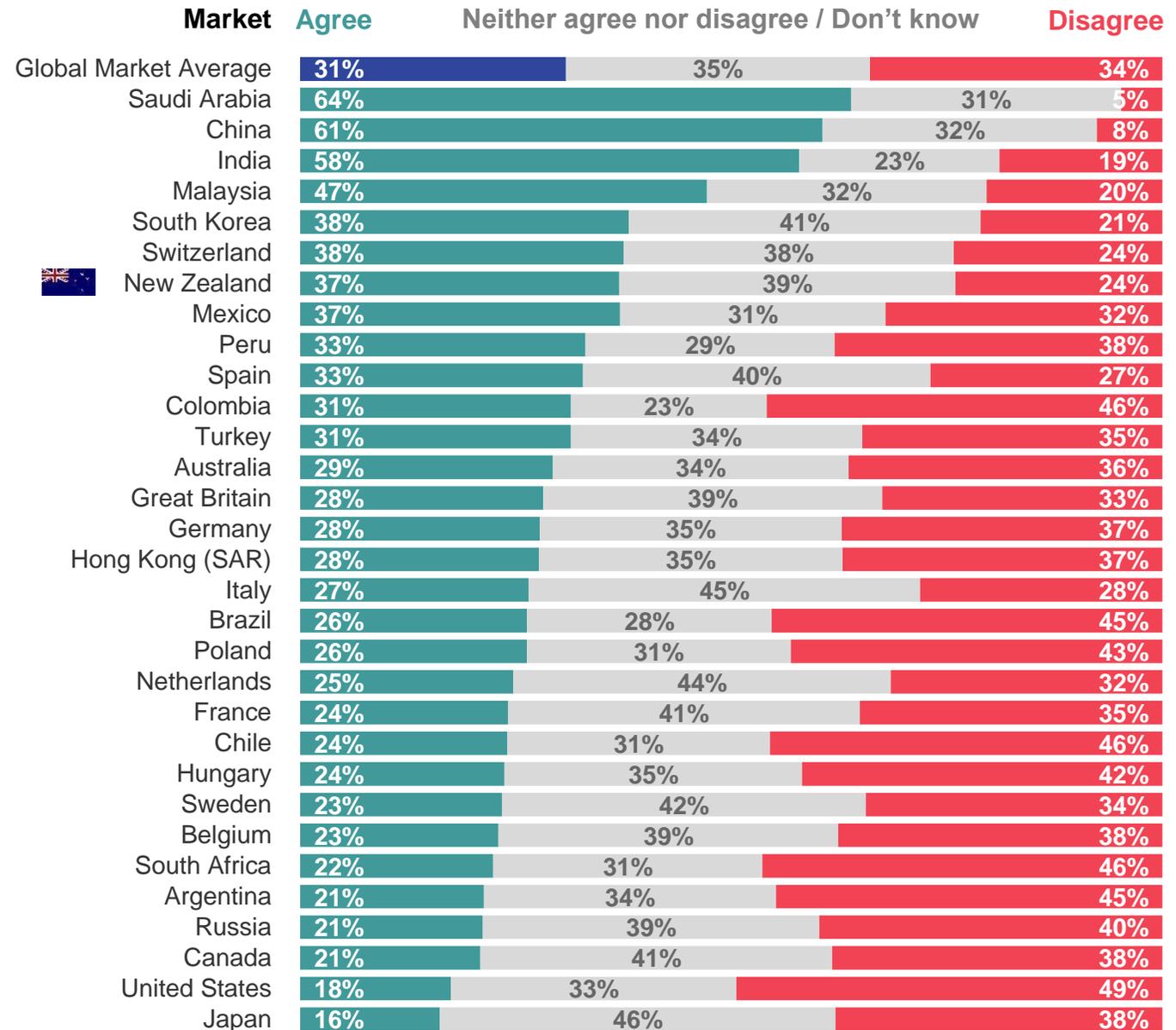


Base: NZ sample (n=1,010). NB: Green / Red indicates significantly higher / lower scores compared to total NZ results.
 Q. If New Zealand's government does not act now to combat climate change, it will be failing the people of New Zealand.
 Q. If businesses in New Zealand do not act now to combat climate change, they will be failing their employees & customers
 Q. If individuals like me do not act now to combat climate change, we will be failing future generations

Awareness of government plans to tackle climate change is generally low but higher in New Zealand compared to global average & Australia

Q. To what extent do you agree or disagree with the following:

[MARKET]'s government has a clear plan in place for how government, businesses & people themselves are going to work together to tackle climate change

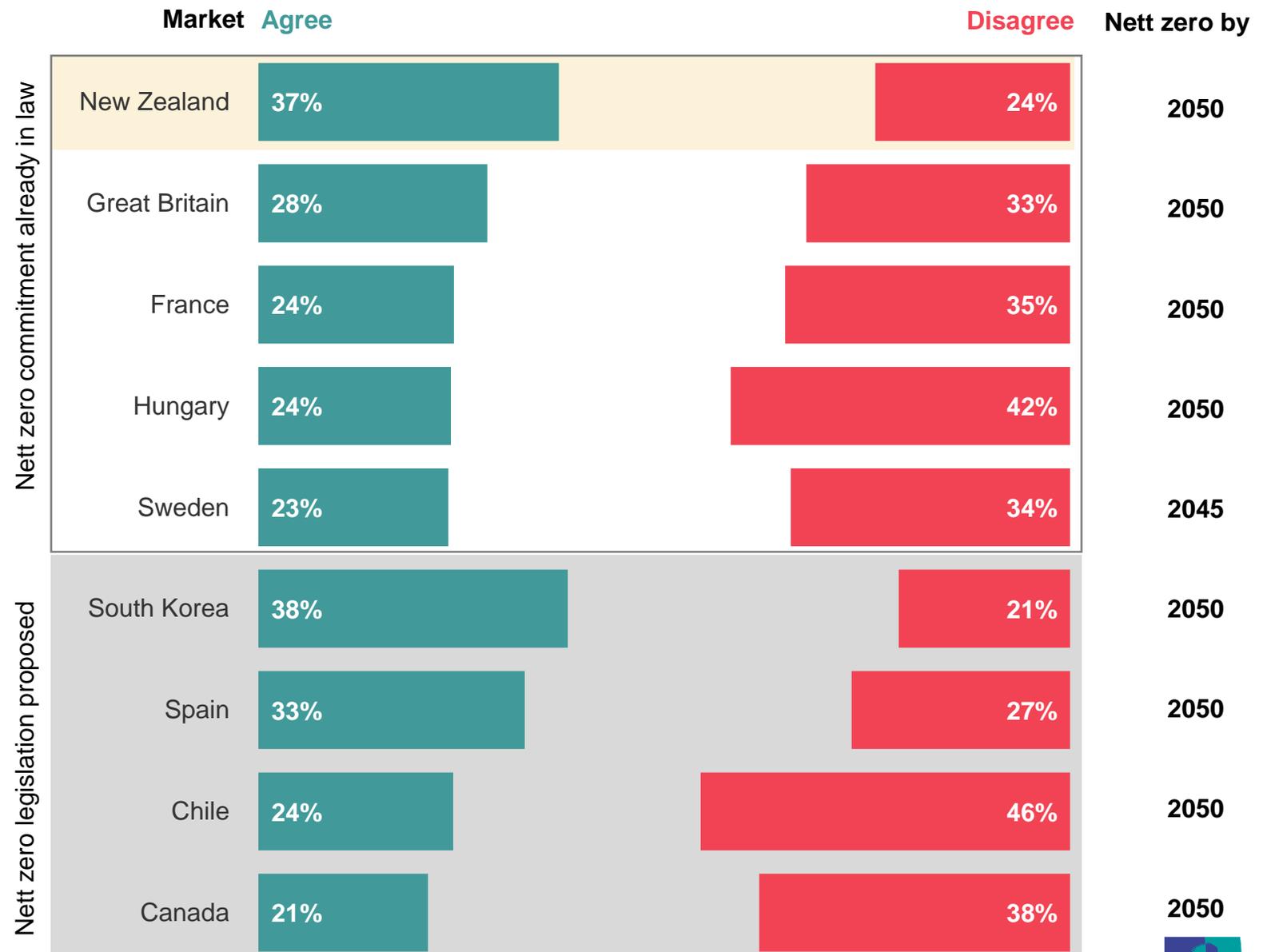


Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

New Zealanders are more likely to state that the government has a clear plan in place, compared to other countries with a similar nett zero target date

Q. To what extent do you agree or disagree with the following:

[MARKET]'s government has a clear plan in place for how government, businesses & people themselves are going to work together to tackle climate change



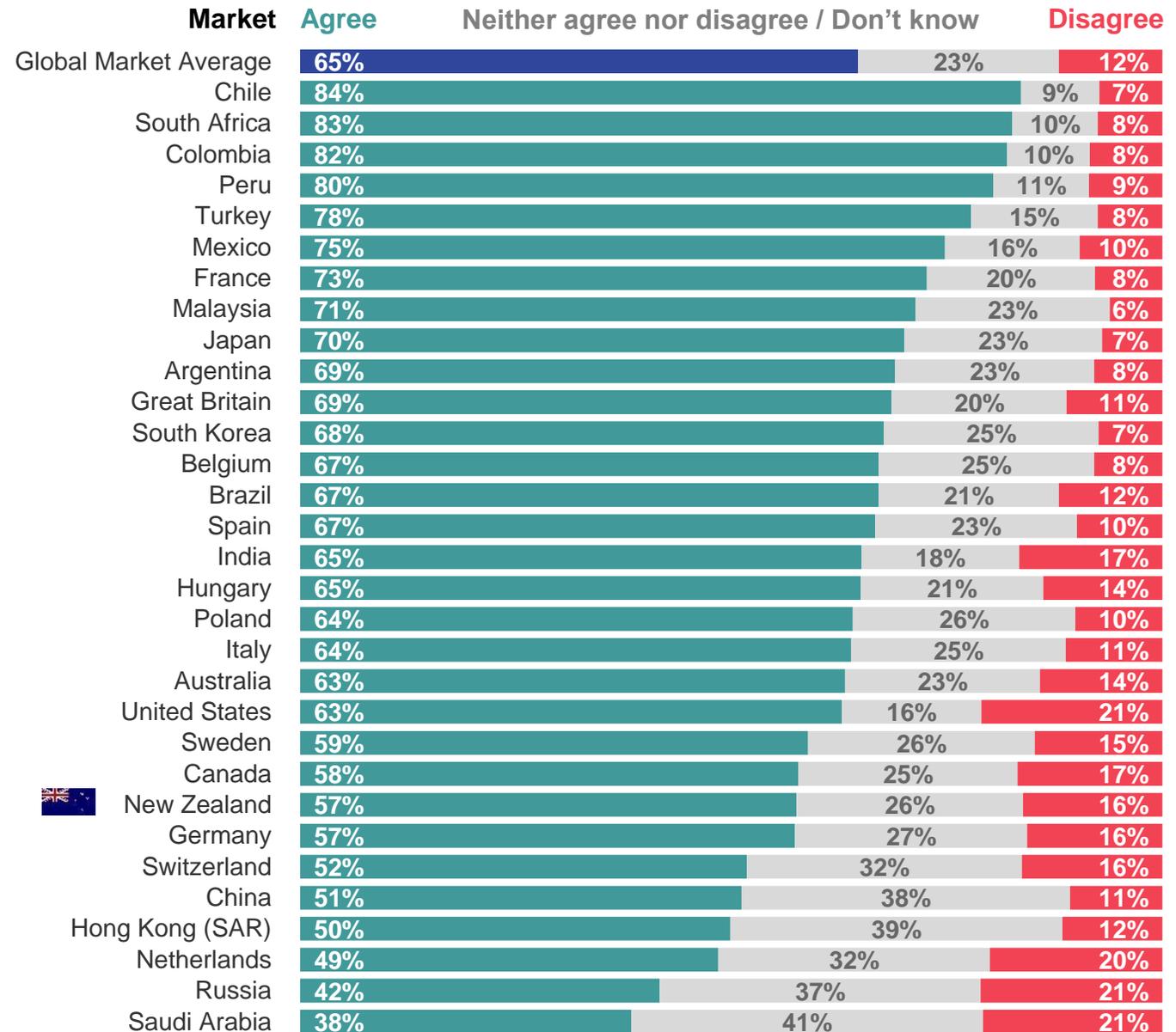
Base: New Zealand: n=1,010; Other countries combined: n=6,502.

Source: Energy & Climate Intelligence Unit, 2020. Nett Zero tracker: Nett Zero Emissions Race. Available here: <https://eci.u.net/netzerotracker>

Compared to the global average (65%), 57% in New Zealand feel the government needs to act now, lower than Great Britain (69%) & Australia (63%)

Q. To what extent do you agree or disagree with the following:

If [MARKET]'s government does not act now to combat climate change, it will be failing the people of [MARKET]

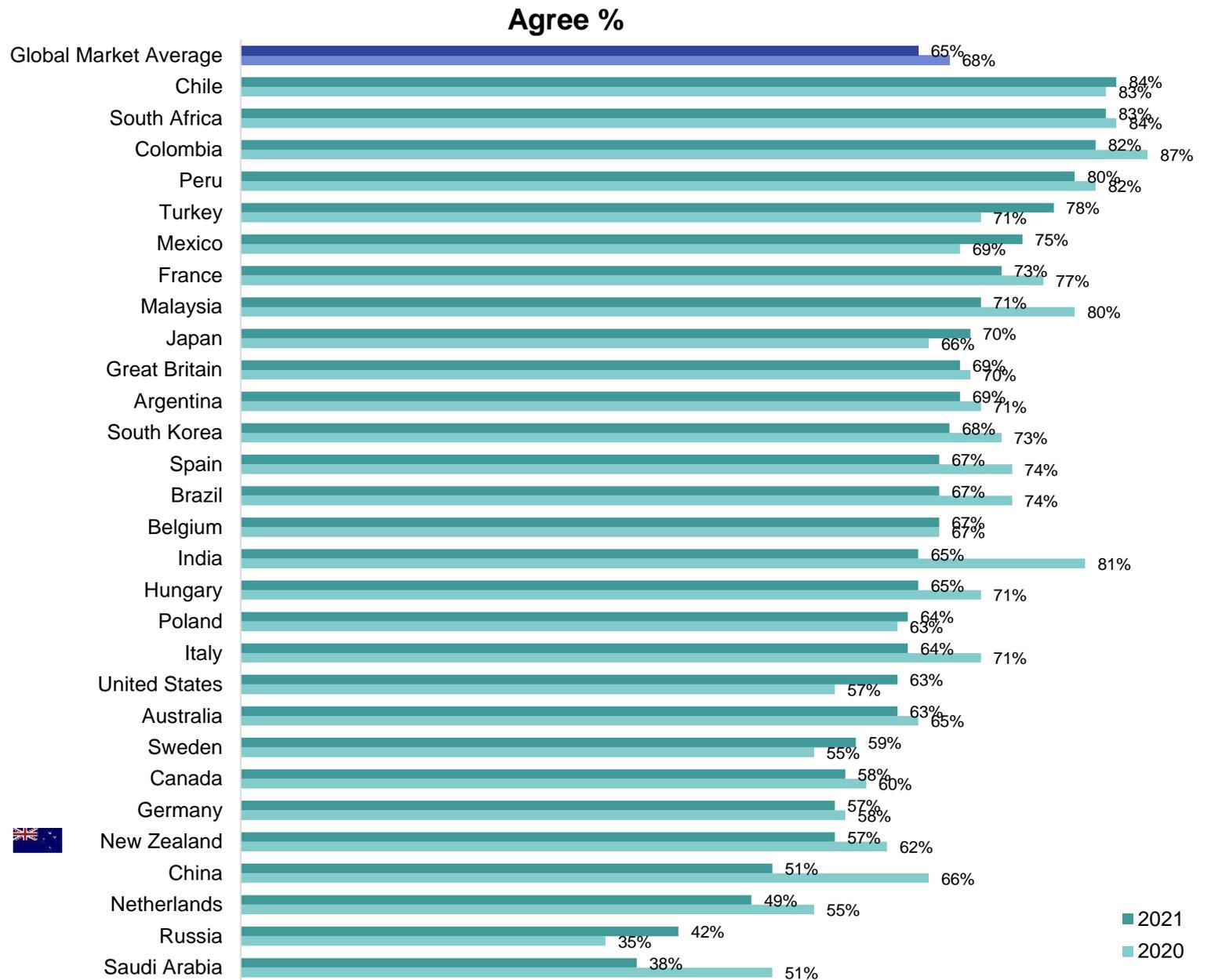


Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

Despite a turbulent year of competing priorities, perceptions of government responsibility are broadly stable. A 5-point drop in New Zealand compared to 2020

Q. To what extent do you agree or disagree with the following:

If [MARKET]'s government does not act now to combat climate change, it will be failing the people of [MARKET]

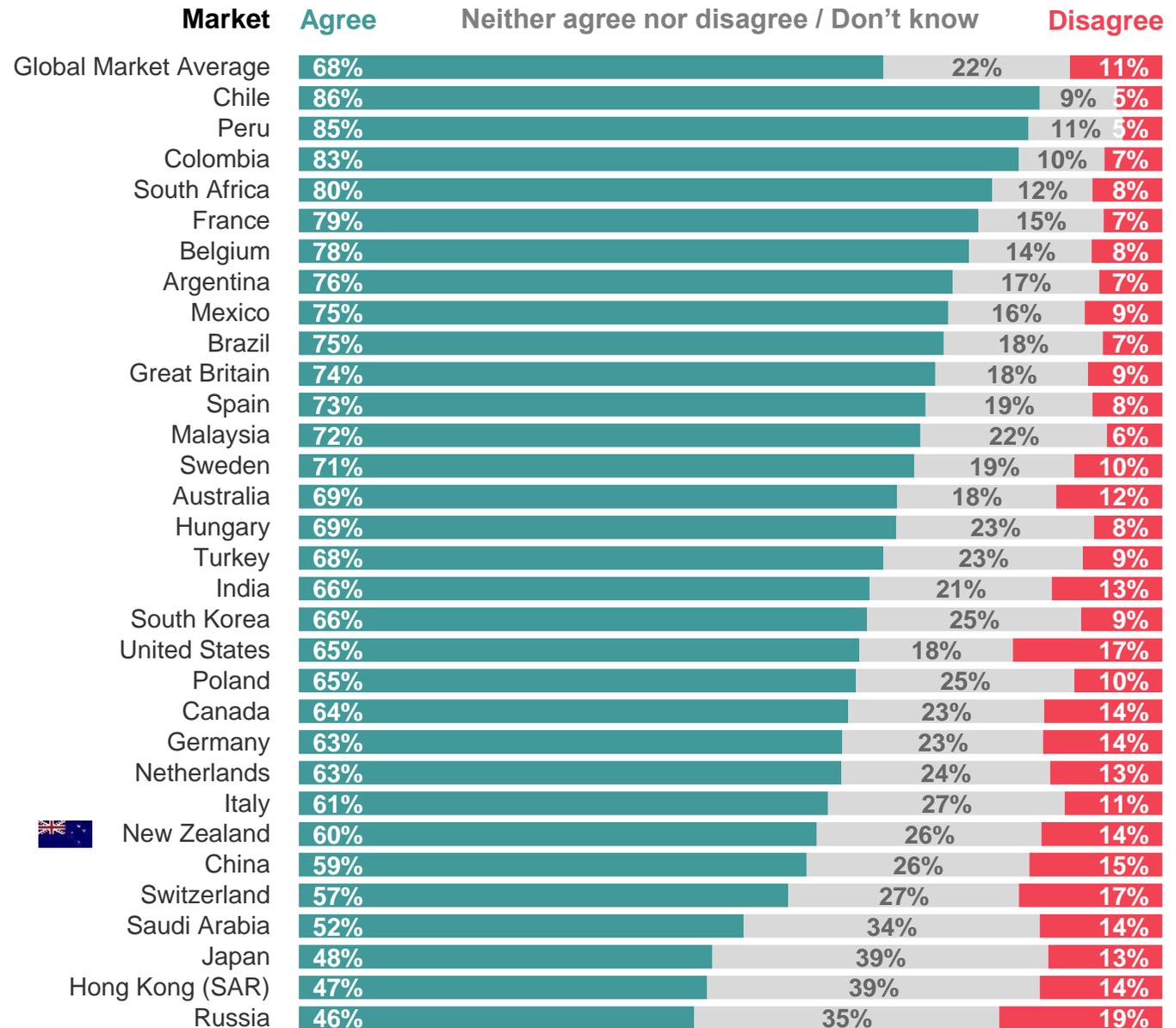


Base: 2021: Global market average (excl. New Zealand): n=21,011; New Zealand: n=1,010; 2020: Global market average (excl. New Zealand): n=20,031; New Zealand: n=610; **Comparator markets** are those that have been asked this question in 2021 and 2020: Argentina, Australia, Belgium, Brazil, Canada, China, Chile, Colombia, France, Great Britain, Germany, Hungary, India, Italy, Japan, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.

The public mandate for corporate action is similar to the mandate for government action. 3 in 5 New Zealanders agree businesses must act now

Q. To what extent do you agree or disagree with the following:

If businesses in [MARKET] do not act now to combat climate change, they will be failing their employees & customers

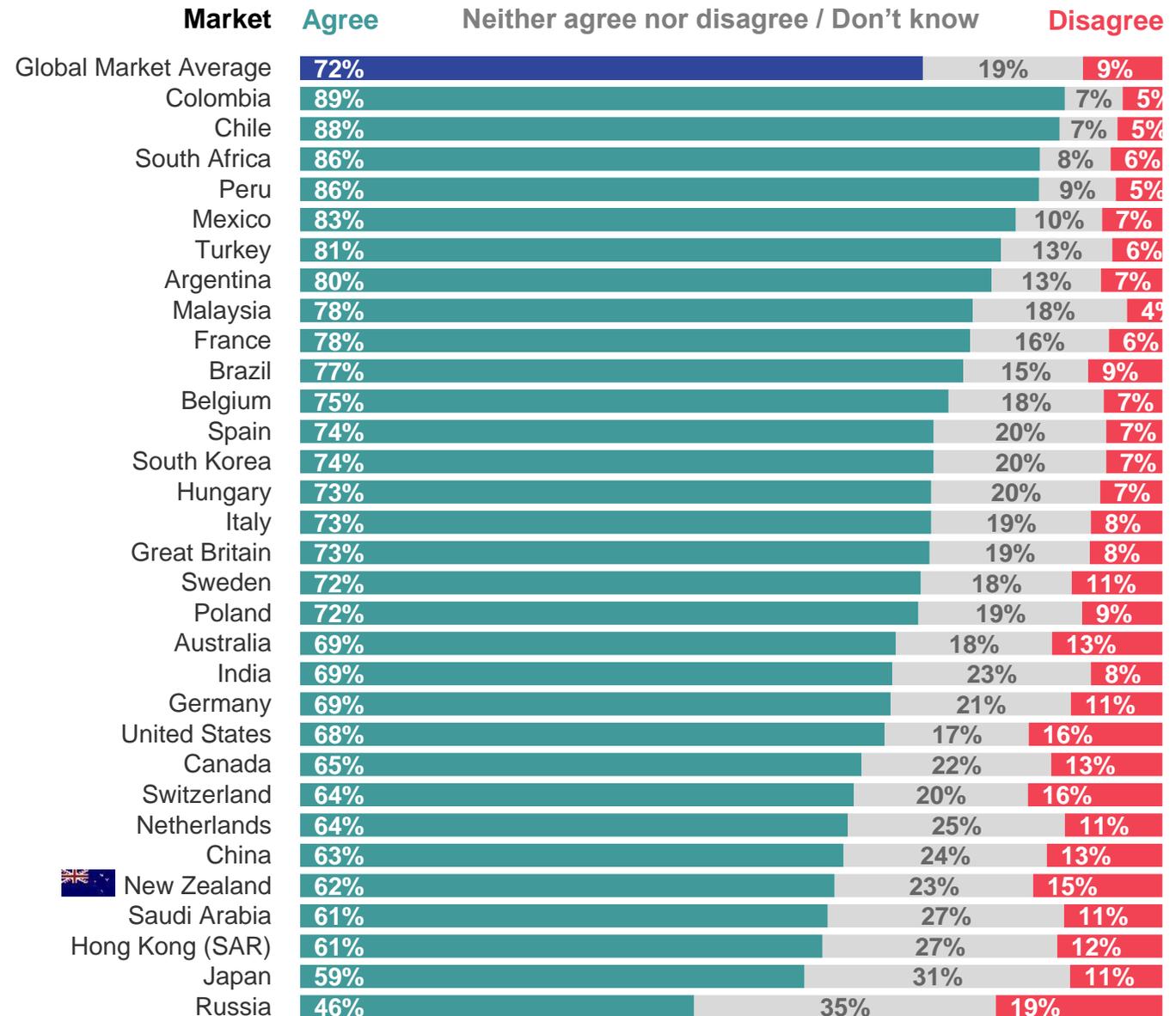


Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

Individuals also feel the burden of responsibility on their shoulders. Though 3 in 5 New Zealanders agree, the country ranks very low

Q. To what extent do you agree or disagree with the following:

If individuals like me do not act now to combat climate change, we will be failing future generations



Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

A cyclist wearing a helmet and a face mask is riding a bicycle past a line of cars in a parking lot. The cyclist is wearing a dark jacket, a white t-shirt, and a red backpack. The cars are parked in a row, and the background shows trees and a building.

Climate change after COVID-19

How willing are citizens to make pro-environmental behaviour changes post COVID-19?

Summary: COVID-19 & climate change



Opinions are divided on whether tackling climate change should or should not be a **priority in the economic recovery** from Covid-19. 35% of the global citizens believe climate change should be a priority in the economic recovery, while 36% believe it should not. New Zealanders hold the same views.



COVID-19 and actions to control its spread have restricted the public's ability or willingness to behave in ways with a relatively high environmental impact. Some ask if, once restrictions are removed, people will revert to less sustainable behaviours. This research suggests that overall, the public do not expect this to happen.

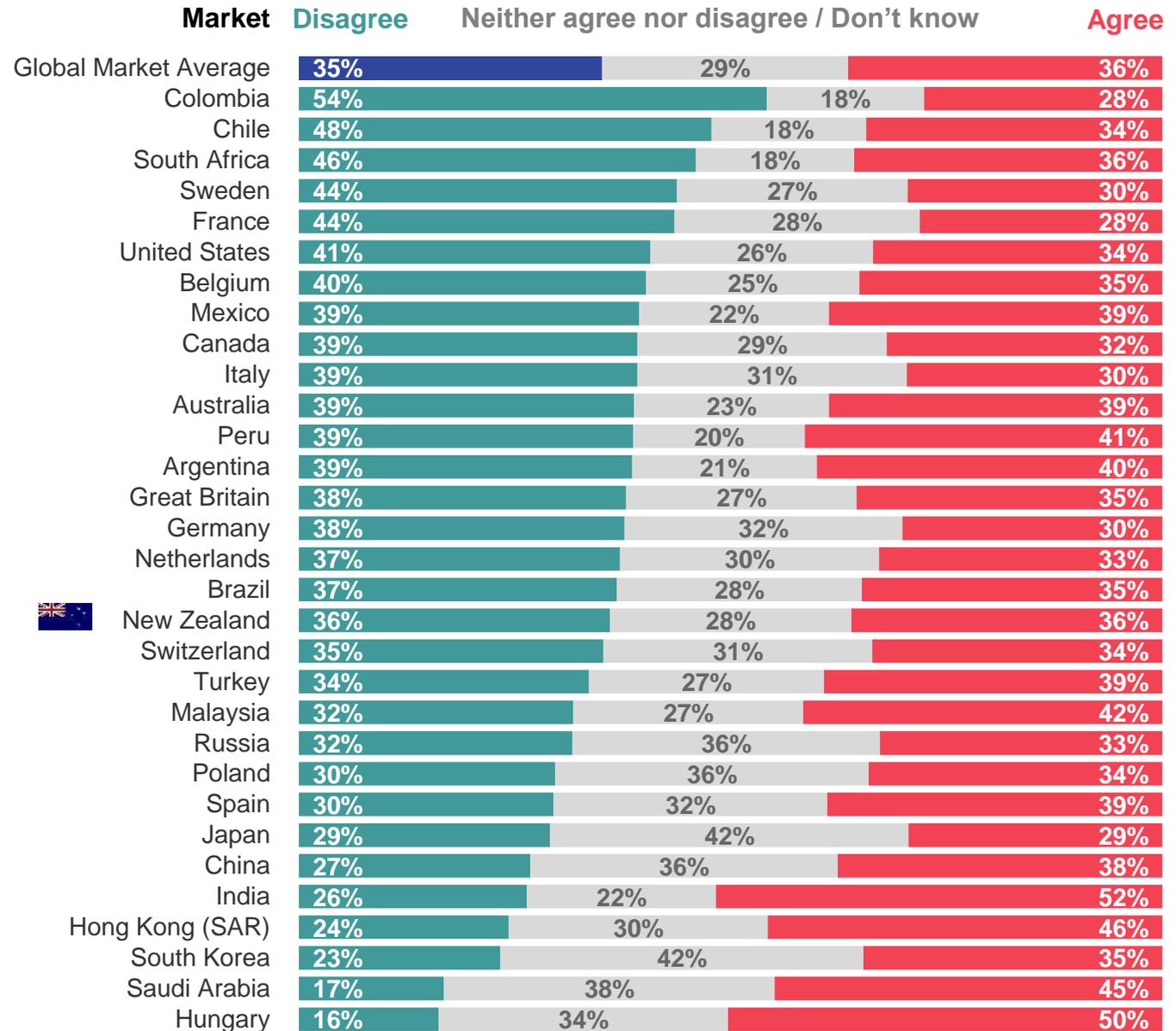


Looking at individuals' behavioural shifts, we see the pandemic's influence on **movement towards pro-environmental behaviours**. Around a third, on average, expect to do more to reduce food waste, use alternatives to the car, restrict their shopping to just what they really need or work from home rather than commuting.

The public around the world & in New Zealand are divided on prioritisation of climate change in the COVID-19 recovery

Q. To what extent do you agree or disagree with the following:

Tackling climate change should not be a priority for [MARKET]'s government in the economic recovery from Covid-19

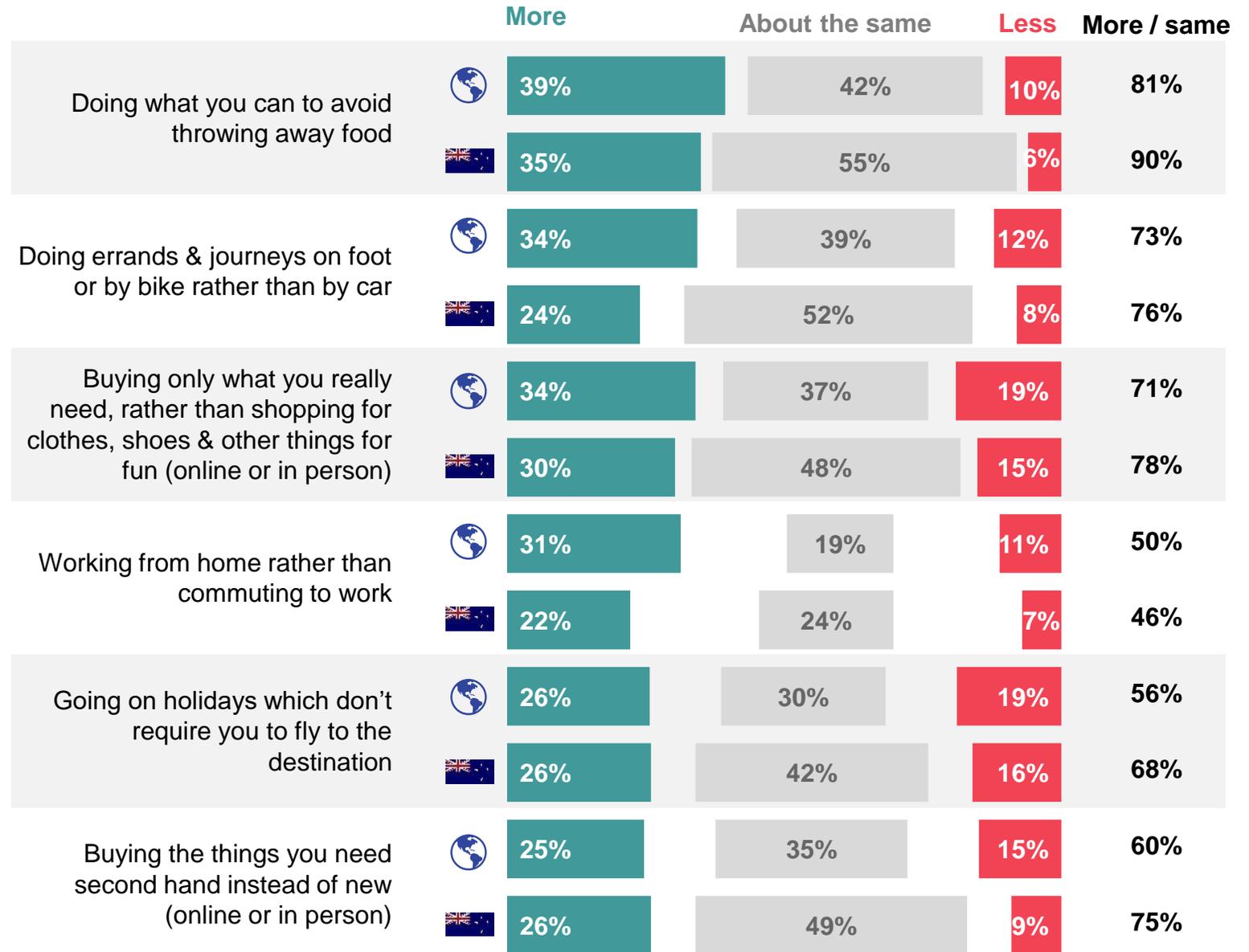


Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

Overall, people do not expect to revert to less sustainable behaviours. New Zealanders are less likely to believe so compared to the global average

Q. How do you expect your personal behaviours to change once any restrictions on your life because of coronavirus are removed?

Do you expect to do the following things more, less, or the same amount as you did before the coronavirus pandemic?



Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

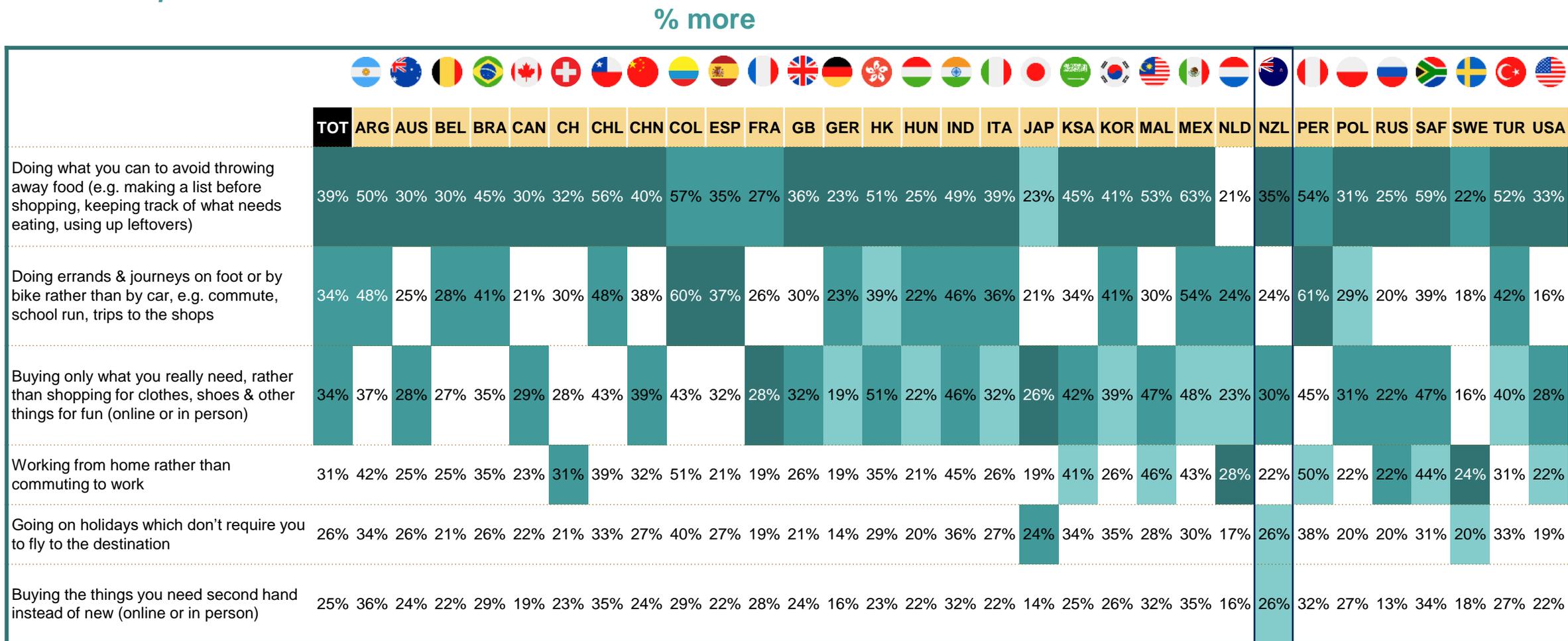
 Global market average
 New Zealand



Reducing food waste tops the list of changed behaviours

Q. How do you expect your personal behaviours to change once any restrictions on your life because of coronavirus are removed? Do you expect to do the following things more, less, or the same amount as you did before the Coronavirus pandemic?

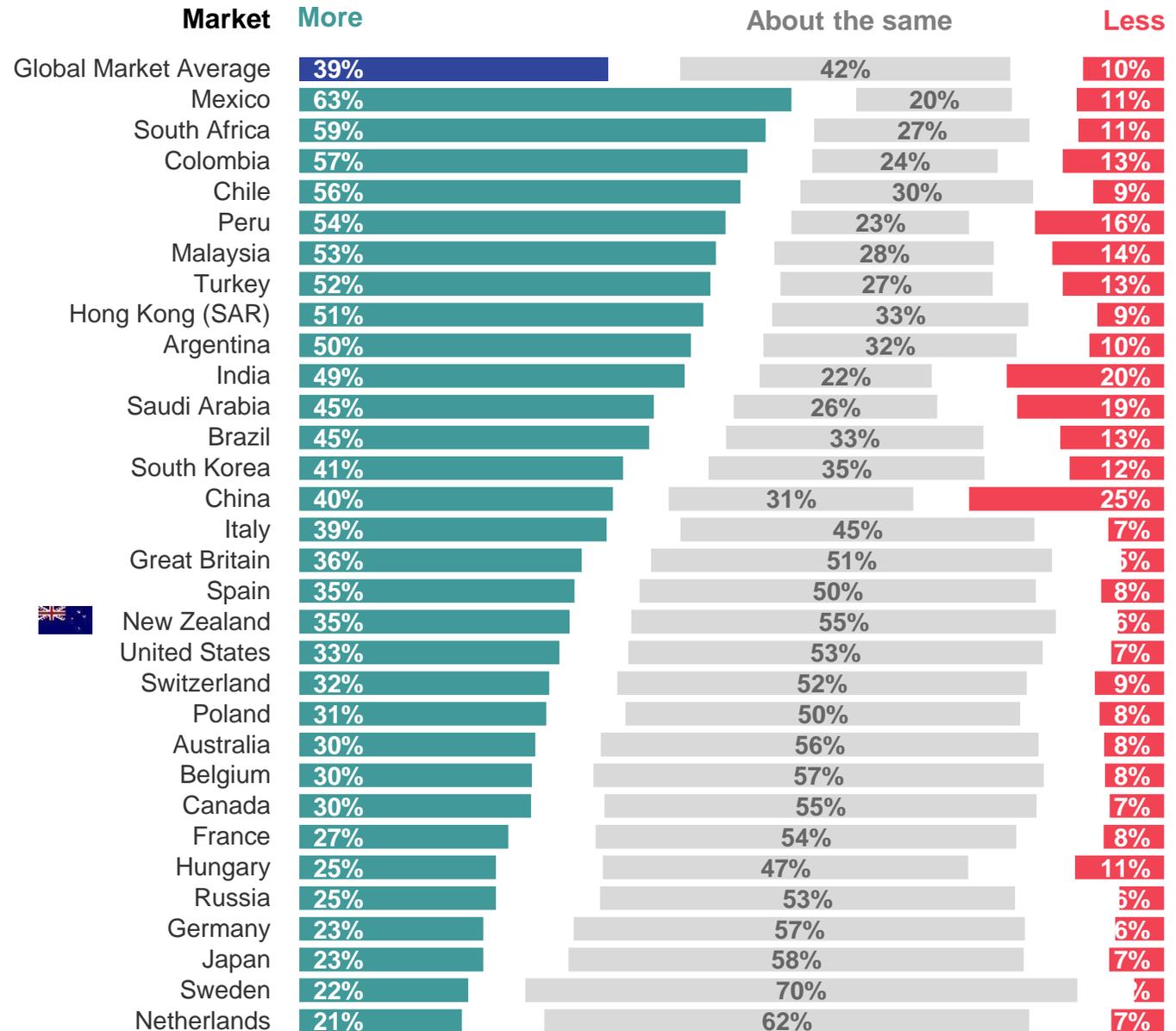
Top-3 actions:
 #1 in market
 #2 in market
 #3 in market



In general, people think they will try harder to avoid food waste. In New Zealand, just over half will continue with their pre-COVID ways

Q. How do you expect your personal behaviours to change once any restrictions on your life because of coronavirus are removed? Do you expect to do the following things more, less, or the same amount as you did before the coronavirus pandemic?

- Doing what you can to avoid throwing away food (e.g. making a list before shopping, keeping track of what needs eating, using up leftovers)

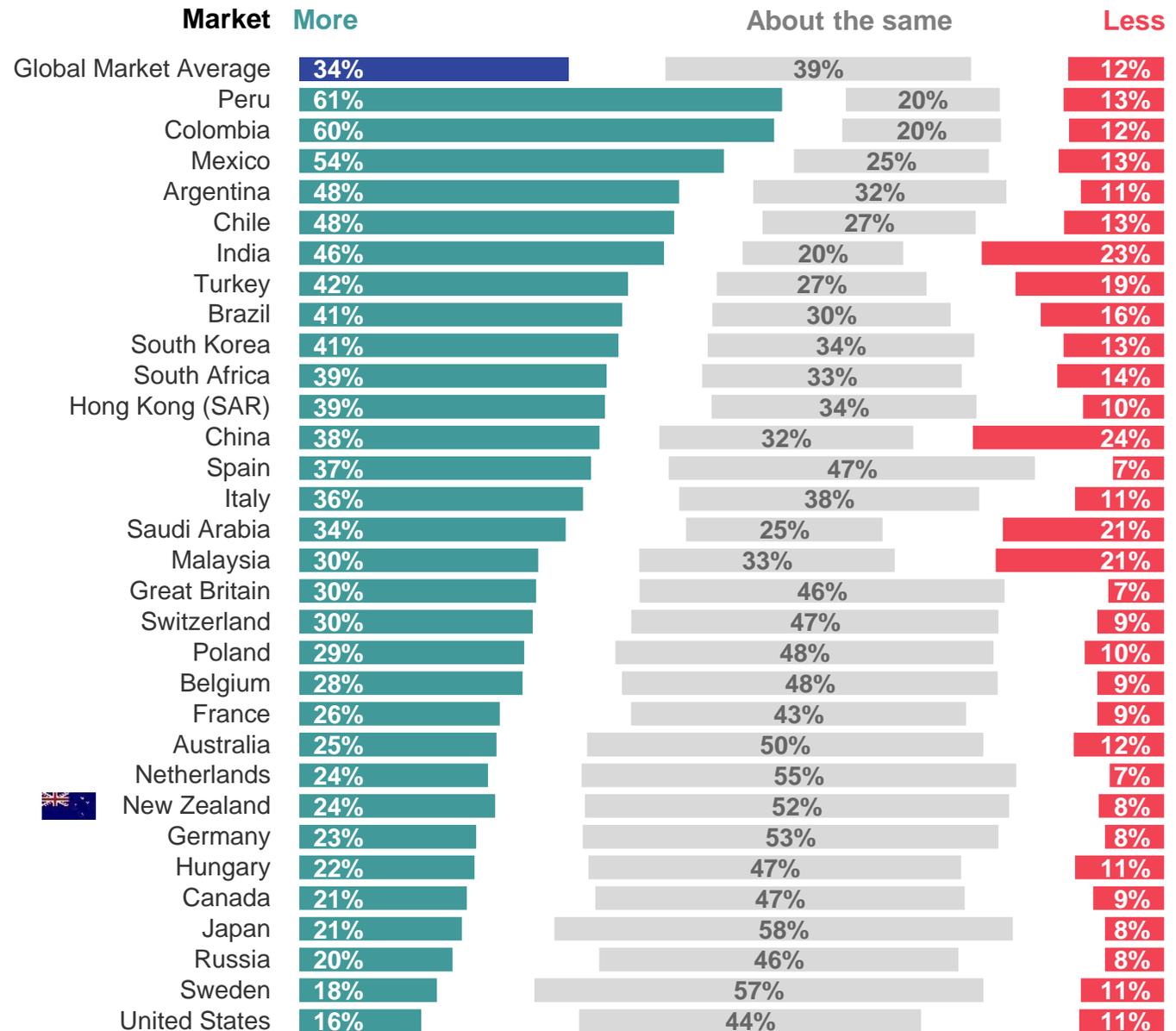


Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

Rolling & strolling are on the up, with more carless journeys here to stay. Only 1 in 4 in New Zealand & Australia are likely to avoid cars in favour or bikes / walking

Q. How do you expect your personal behaviours to change once any restrictions on your life because of coronavirus are removed? Do you expect to do the following things more, less, or the same amount as you did before the coronavirus pandemic?

- Doing errands & journeys on foot or by bike rather than by car, e.g. commute, school run, trips to the shops

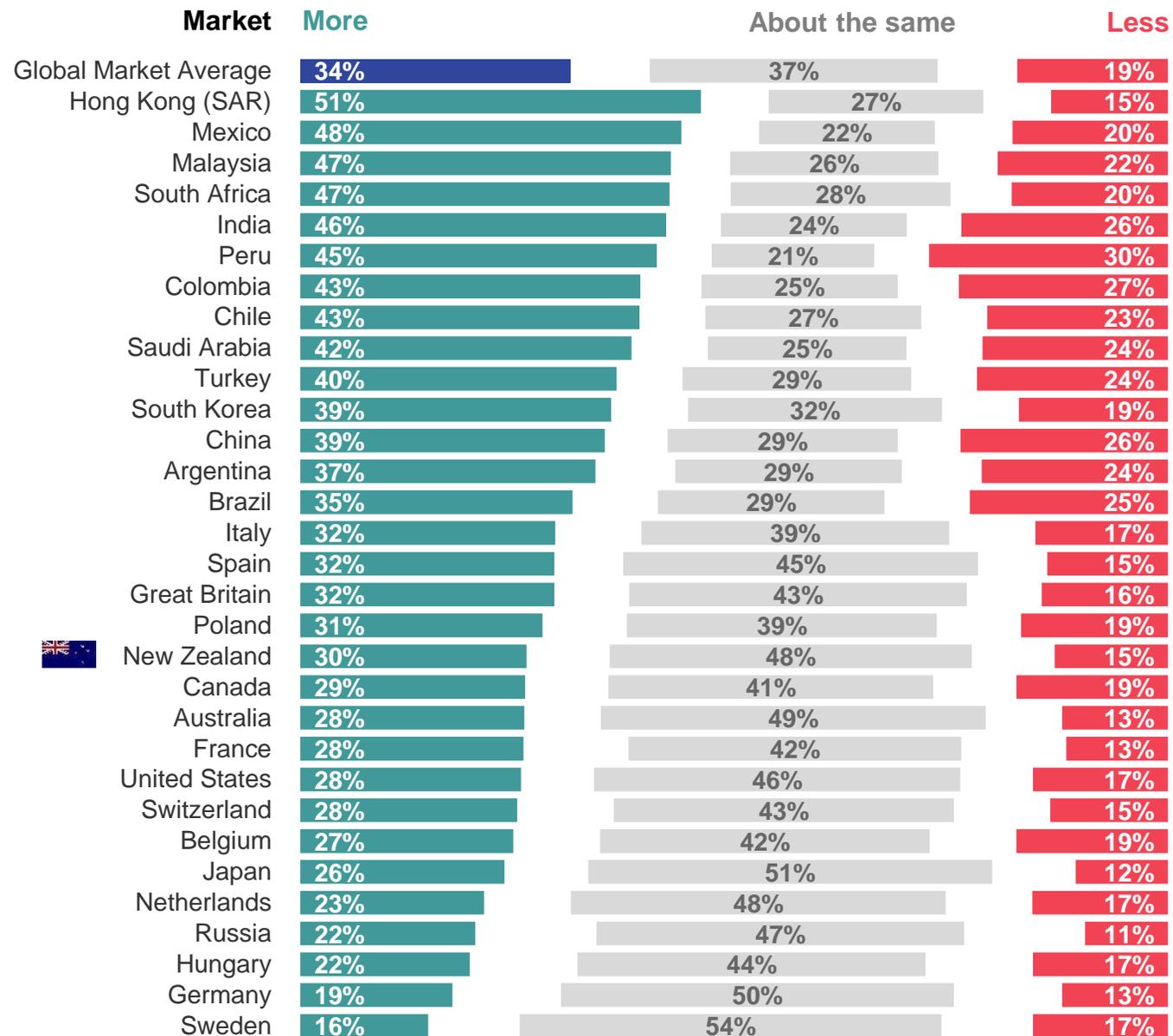


Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

Shopping may be less fun, more functional. Around a third of New Zealanders say they are more likely to only buy what they really need & half will not change their buying behaviour

Q. How do you expect your personal behaviours to change once any restrictions on your life because of coronavirus are removed? Do you expect to do the following things more, less, or the same amount as you did before the coronavirus pandemic?

- Buying only what you really need, rather than shopping for clothes, shoes & other things for fun (online or in person)

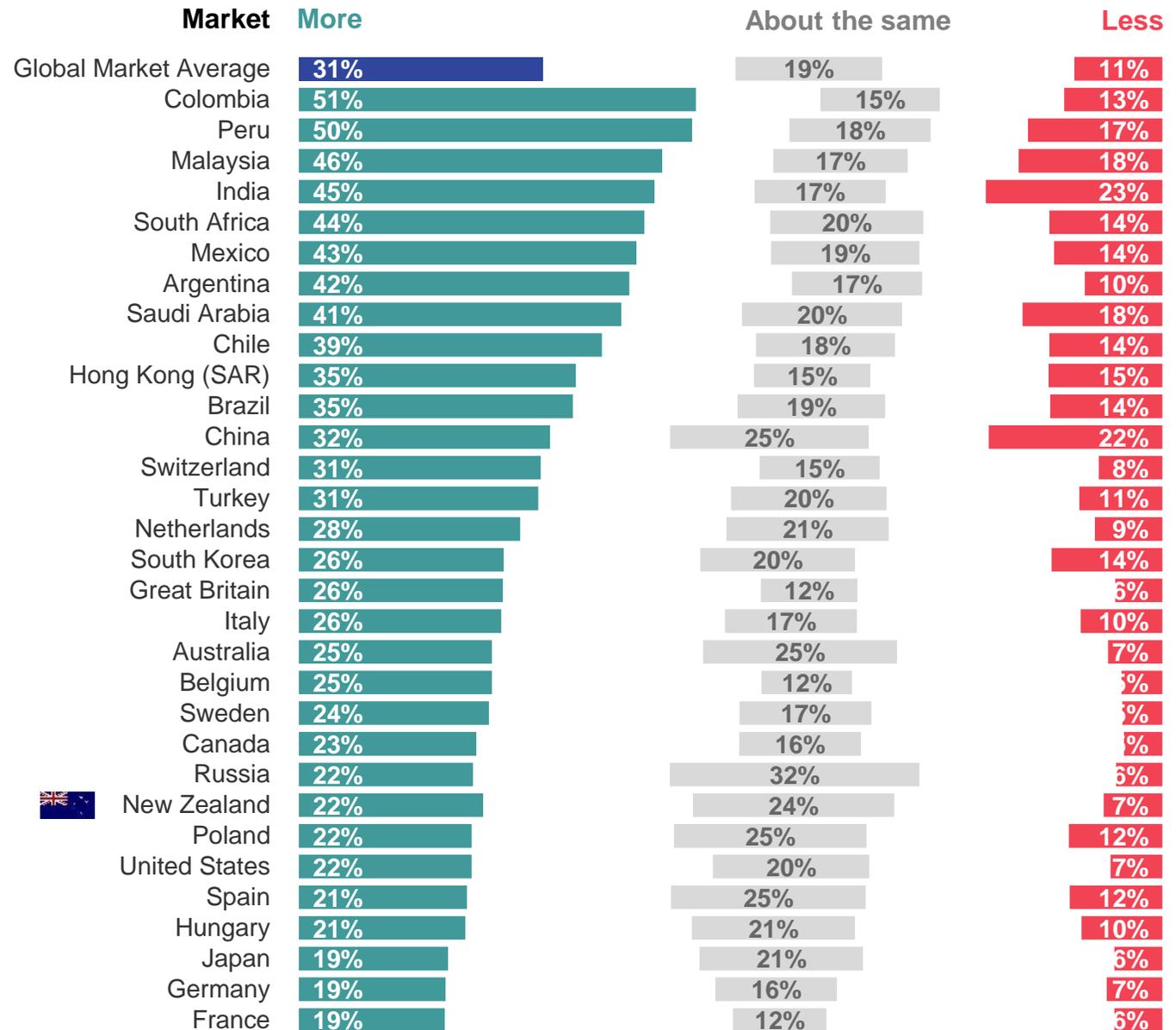


Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

A third of global citizens expect to work more from home after the pandemic, compared to 22% of New Zealanders

Q. How do you expect your personal behaviours to change once any restrictions on your life because of coronavirus are removed? Do you expect to do the following things more, less, or the same amount as you did before the coronavirus pandemic?

- Working from home rather than commuting to work

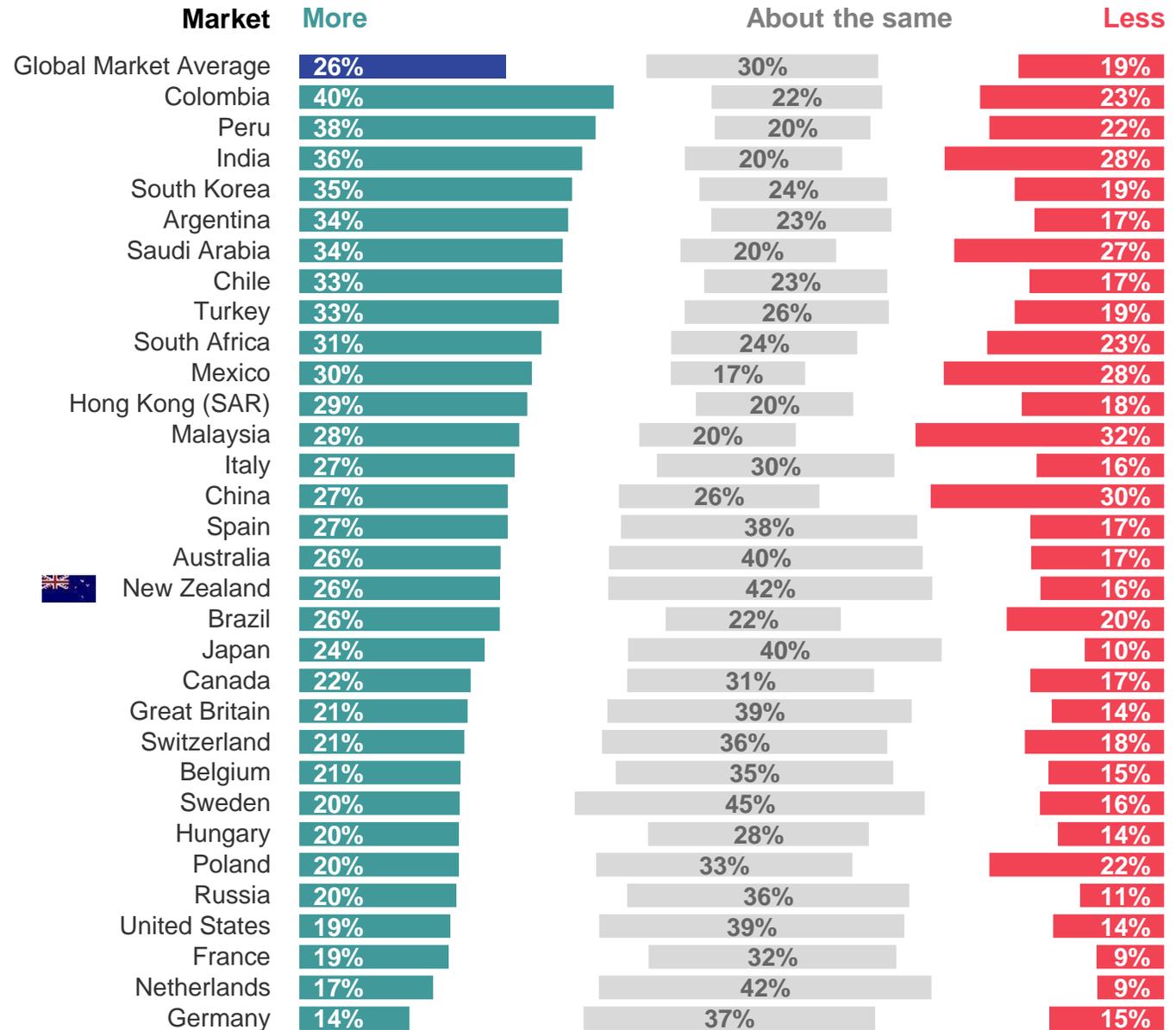


Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

Domestic & no-fly holidays are set to remain popular. Though the NZ rate of avoiding flights for holidays is similar to the global average, 42% are not likely to change their pre-COVID behaviour vs 30% global average

Q. How do you expect your personal behaviours to change once any restrictions on your life because of coronavirus are removed? Do you expect to do the following things more, less, or the same amount as you did before the coronavirus pandemic?

- Going on holidays which don't require you to fly to the destination

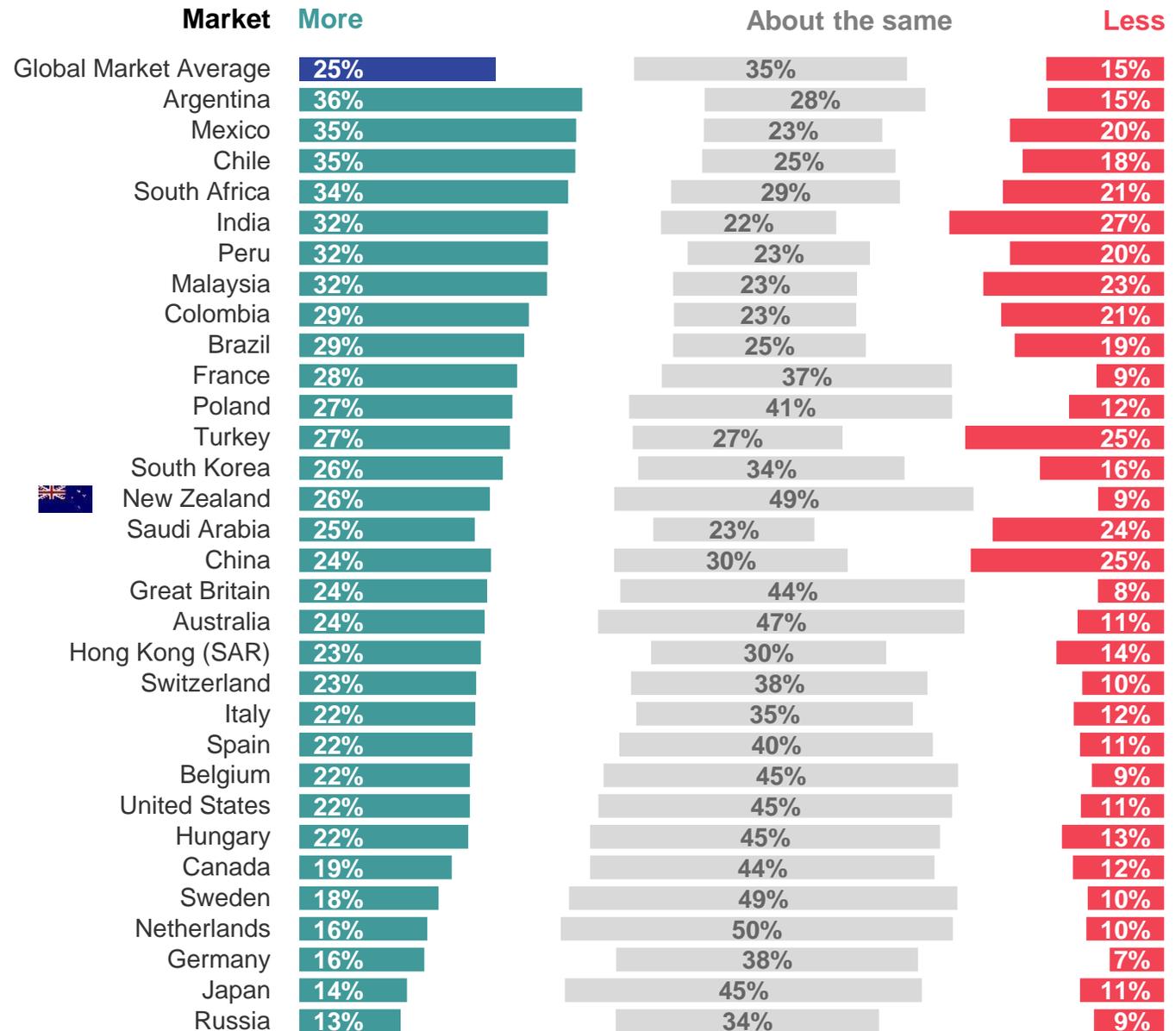


Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

'Old' is the new 'new'? There will be small change in second-hand consumption. 1 in 4 New Zealanders are more likely to buy second hand, whereas half will continue with their pre-COVID ways

Q. How do you expect your personal behaviours to change once any restrictions on your life because of coronavirus are removed? Do you expect to do the following things more, less, or the same amount as you did before the coronavirus pandemic?

- Buying the things you need second hand instead of new (online or in person)



Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

Mass climate action

What personal changes do the public expect to make to limit their contribution to climate change?



Summary: Public attitudes & understanding



People feel the **burden of responsibility for climate change**, with 72% Global Market Average agreement that if ordinary people do not act now to combat climate change, they will be failing future generations.



A Global Market Average of 69% agree 'I understand what action I need to take to play my part in tackling climate change.' Yet Ipsos [Perils of Perception research](#) shows **that this isn't always the case**. We underestimate high-impact actions such as becoming vegetarian and taking flights, and overestimate lower-impact actions such as avoiding excess packaging. While all these actions can make a difference, understanding their relative impact is also vital.



Summary: Public action

Understanding what action needs to be taken



66% in New Zealand believe they understand what needs to be done at an individual level to combat climate change (cf. 69% global market average).

Perceived understanding increases with education levels.

Making changes to limit contribution to climate change



Across all the climate change–saving actions, New Zealanders are below the global market average in terms of planning to make changes over the next year. However, many believe they are already doing enough.

New Zealanders are more receptive towards measures such as saving water, energy and recycling, but are less likely to avoid meat and dairy or replace flights with trains or buses.

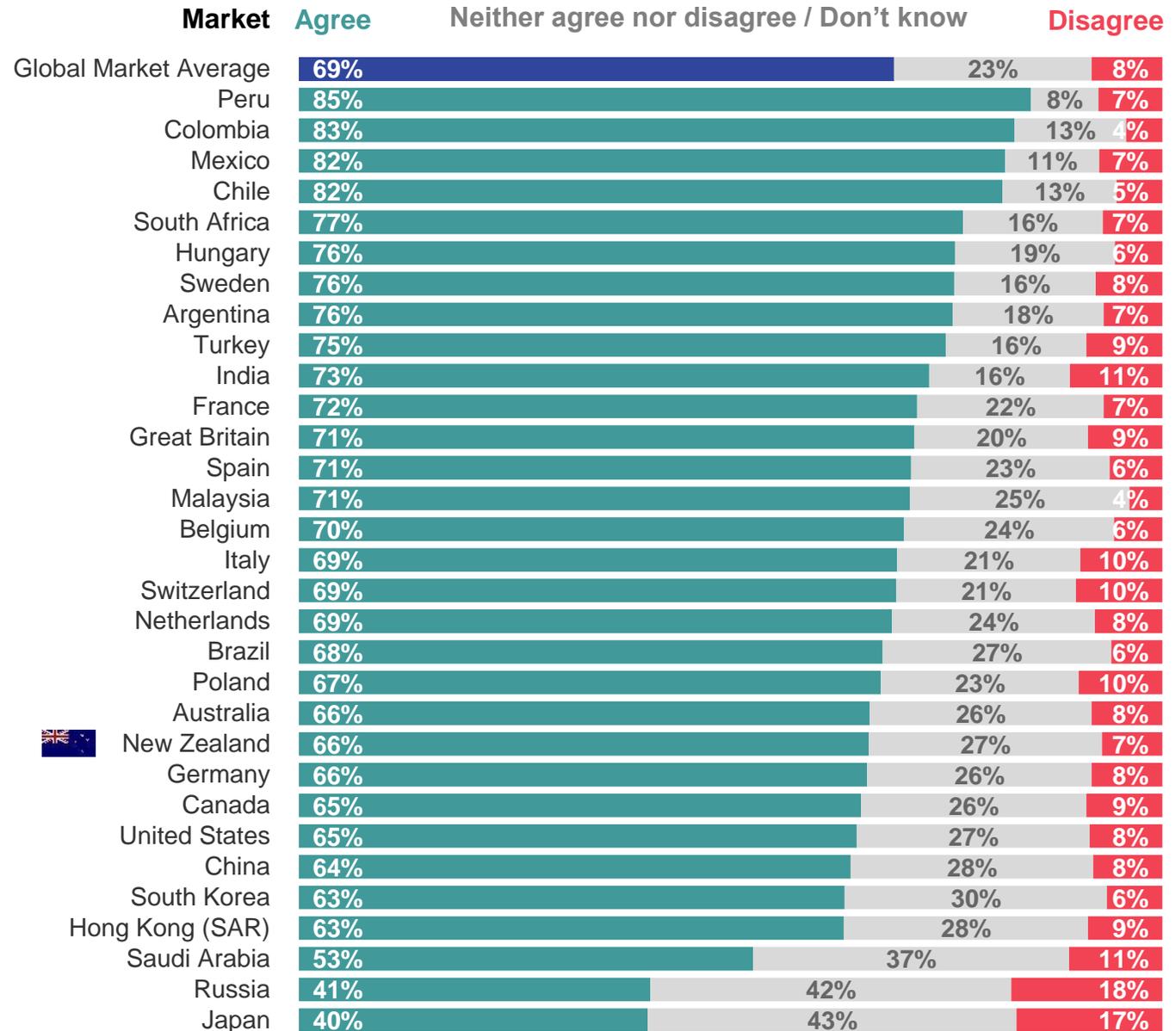
However, those aged under 50 years are more open to replacing flights and avoiding meat, dairy and use of cars in the next year.

Interestingly, those with a household income of over \$100k are less likely to be engaging in practices such as saving water and energy.

Individuals feel they understand what action they need to take, though Ipsos Perils data shows this is not always true

Q. To what extent do you agree or disagree with the following:

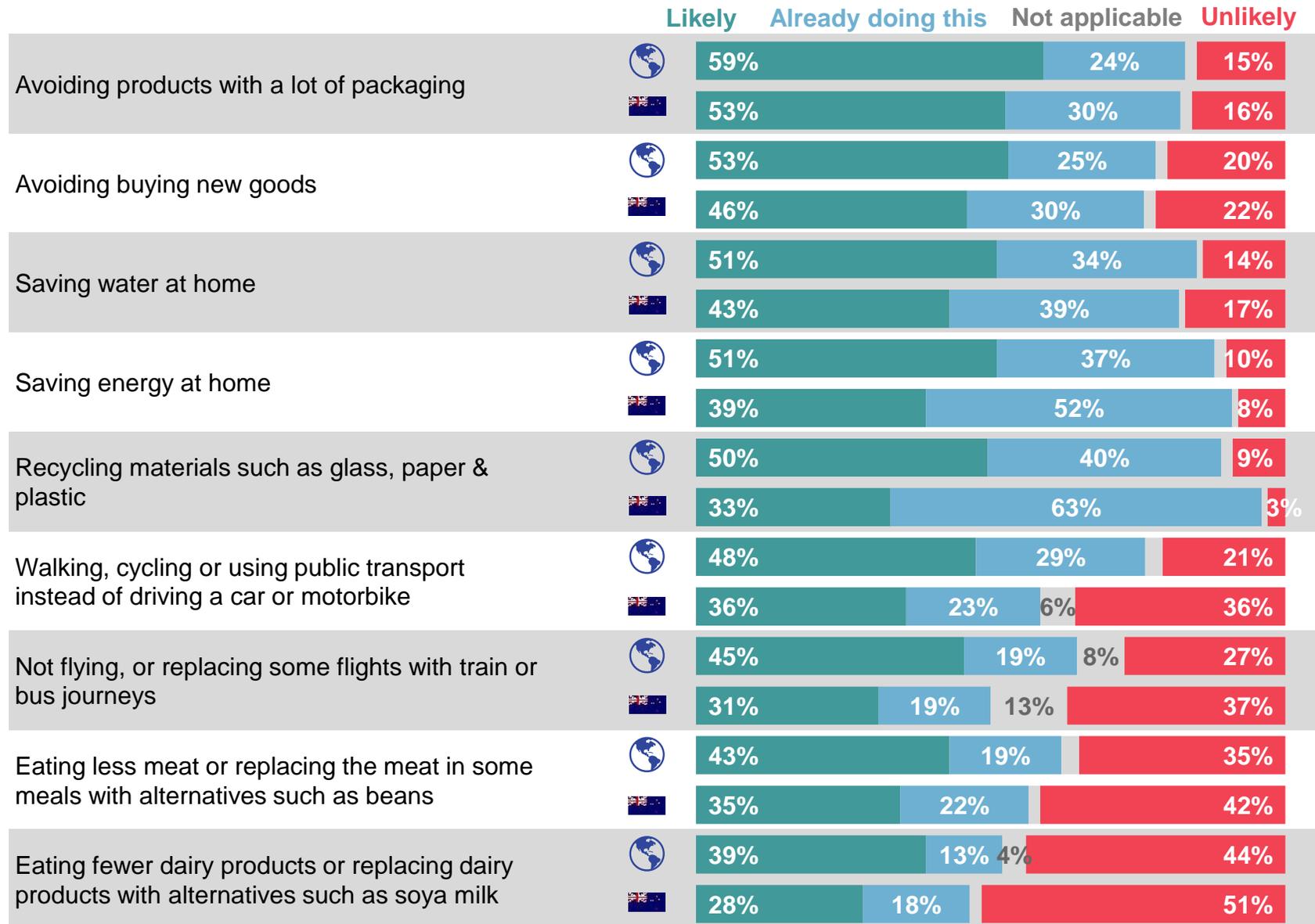
I understand what action I need to take to play my part in tackling climate change



Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

New Zealanders have already made changes by recycling & saving energy at home, but are less willing to reduce dairy / meat consumption or make transport & travel adjustments

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?



Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010

While the public believe they know what action they should take, **higher-impact climate actions are consistently at the bottom of their list.** Ipsos Perils of Perception research shows the public **overestimate low-impact changes and underestimate high-impact ones.**

Little change on sustainable behaviours since last year except for dairy consumption in New Zealand

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

% Likely + Already doing this

Change in behaviours 2021 vs 2020 (percentage point difference)

	Global market 	New Zealand 
Eating fewer dairy products or replacing dairy products with alternatives such as soya milk	+5	+8
Eating less meat or replacing the meat in some meals with alternatives such as beans	+4	+4
Not flying, or replacing some flights with train or bus journeys	+7	=
Walking, cycling or using public transport instead of driving a car or motorbike	+3	=
Recycling materials such as glass, paper & plastic	+1	=
Saving water at home, e.g. by having shorter showers or not watering your garden / yard	+3	-2
Saving energy at home, e.g. by installing insulation or switching off lights	+1	-1
Avoiding buying new goods, e.g. mending what you have or buying used products instead	+4	=
Avoiding products with a lot of packaging	+4	=

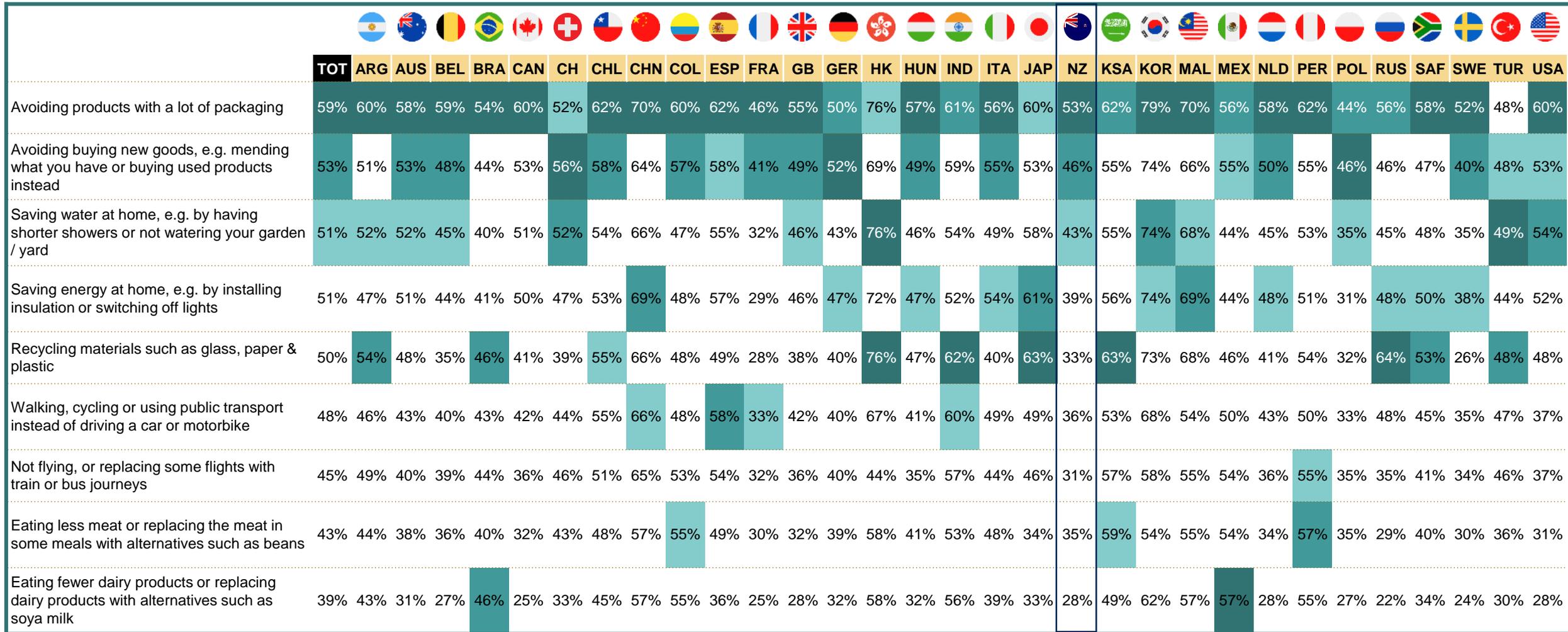
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Likelihood of taking action on climate change 2021 across markets

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Top-3 actions:
 #1 in market
 #2 in market
 #3 in market

% likely

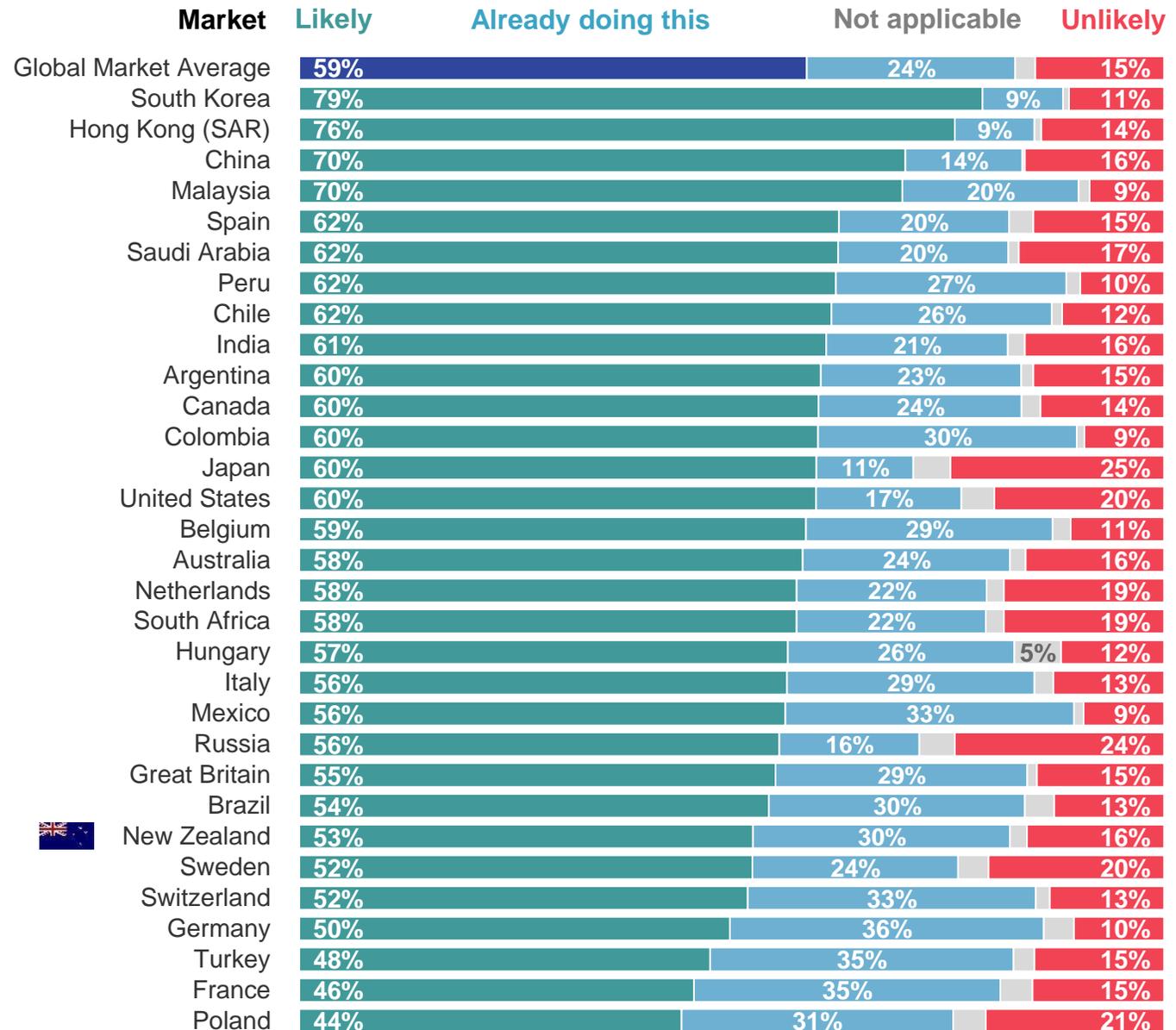


Likelihood of avoiding products with a lot of packaging



Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

- Avoiding products with a lot of packaging

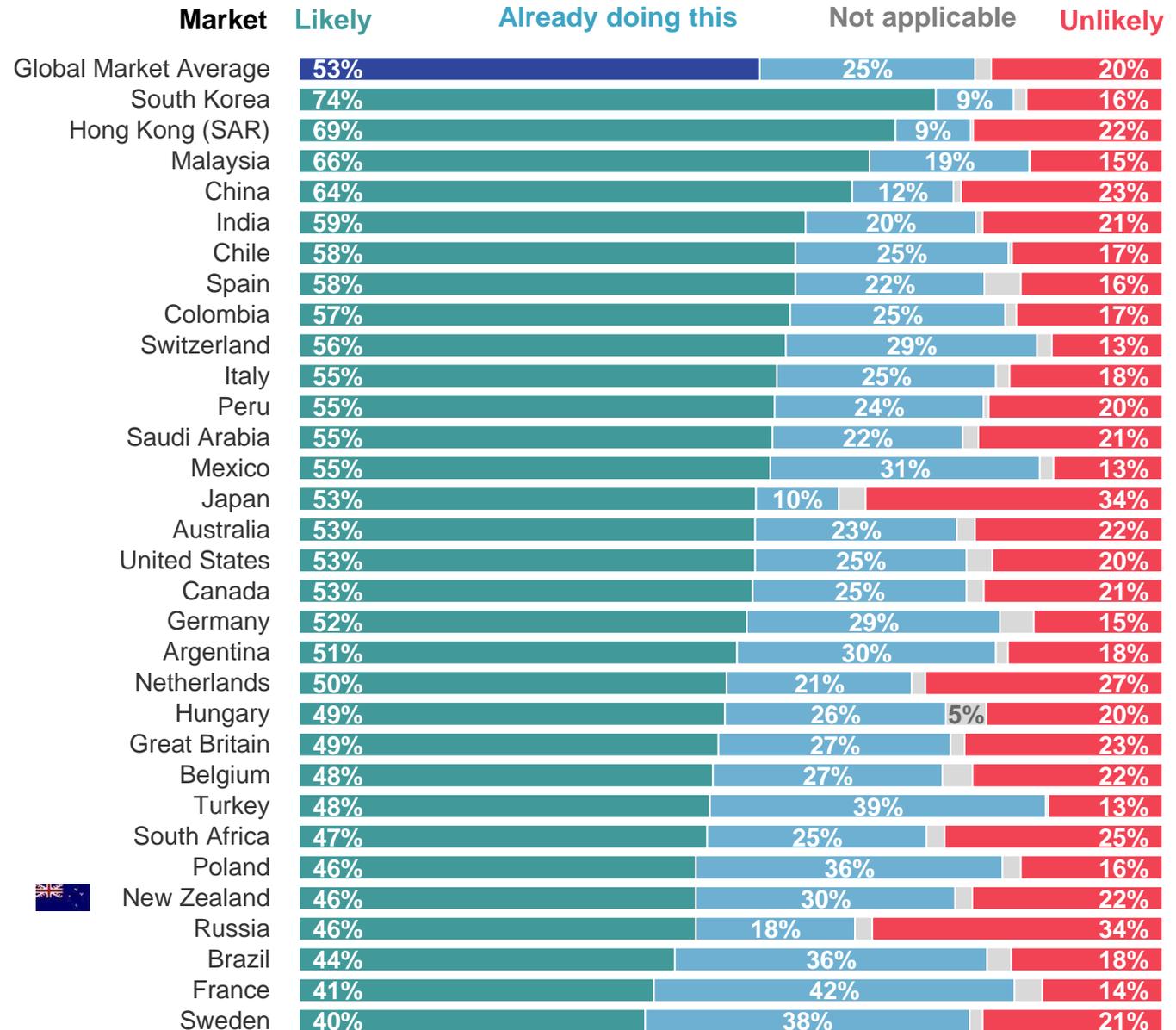


Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010. **Note:** Only percentages 5% and over are shown.

Likelihood of buying second hand & mending broken items

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

- Avoiding buying new goods, e.g. mending what you have or buying used products instead



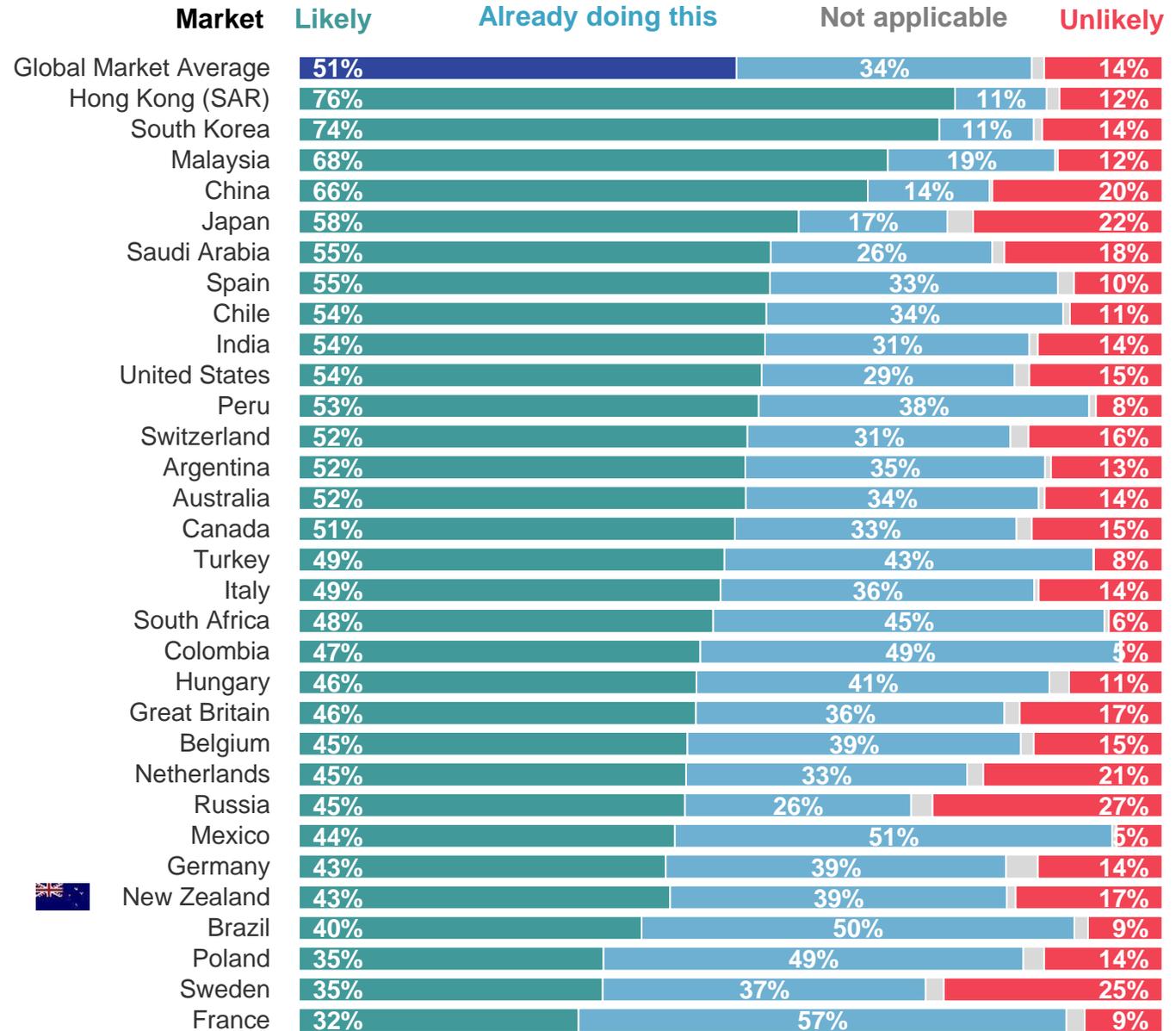
Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010. **Note:** Only percentages 5% and over are shown.



Likelihood of saving water at home

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

- Saving water at home, e.g. by having shorter showers or not watering your garden / yard



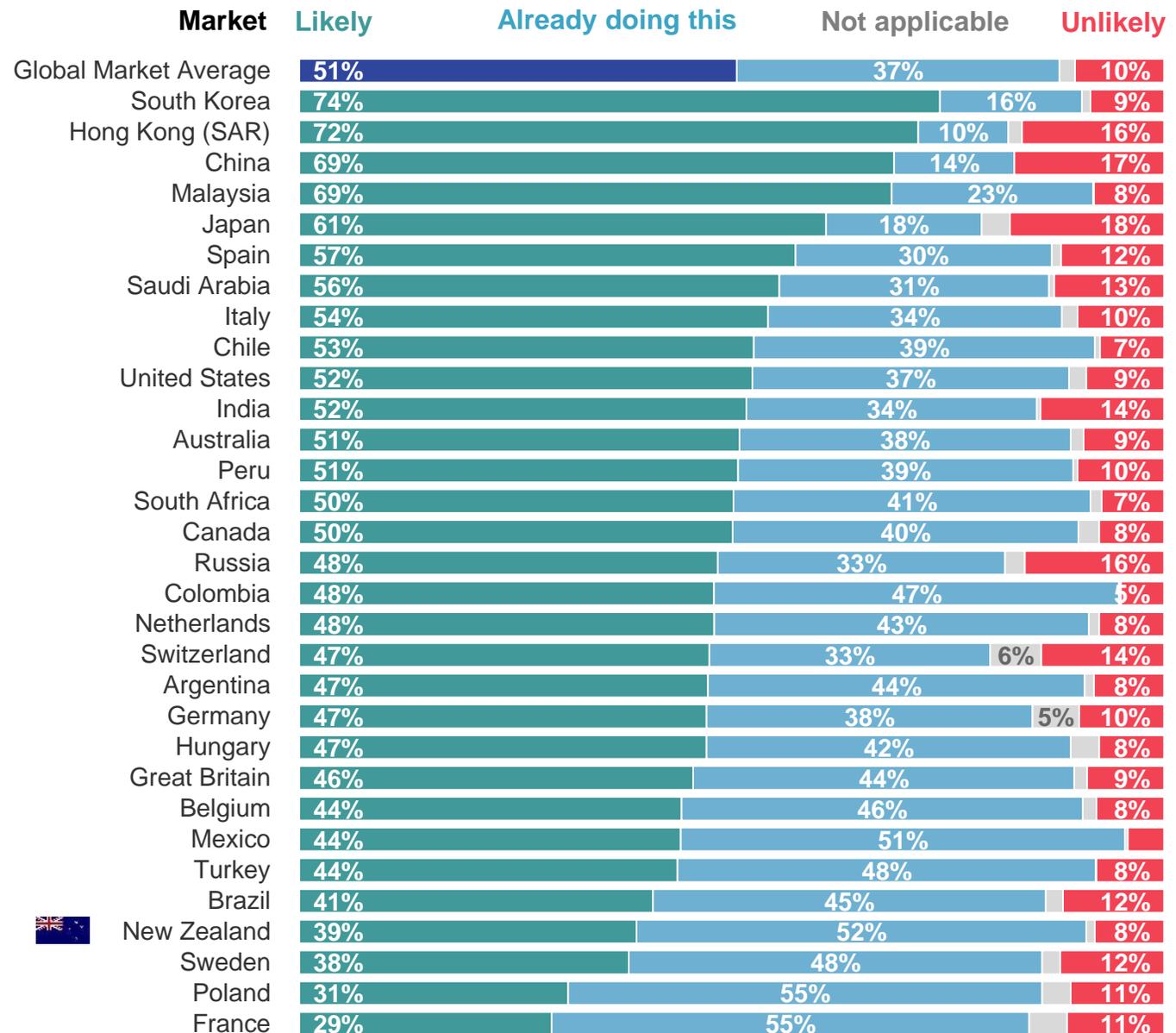
Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010. Note: Only percentages 5% and over are shown.



Likelihood of saving energy at home

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

- Saving energy at home, e.g. by installing insulation or switching off lights



Base: Global market average (excl. New Zealand): n=21,011; New Zealand: n=1,010. Note: Only percentages 5% and over are shown.

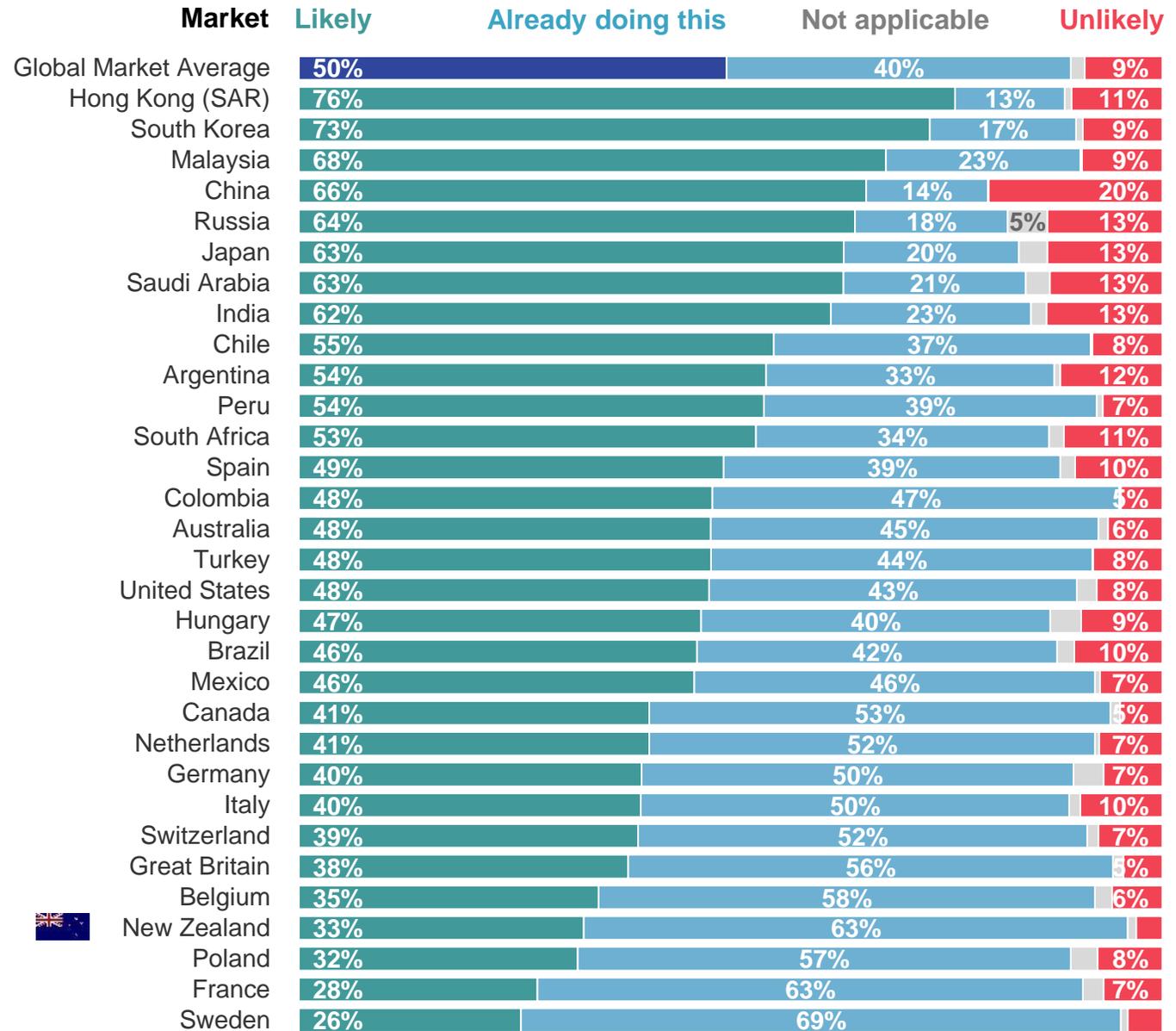


Likelihood of recycling



Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

- Recycling materials such as glass, paper & plastic

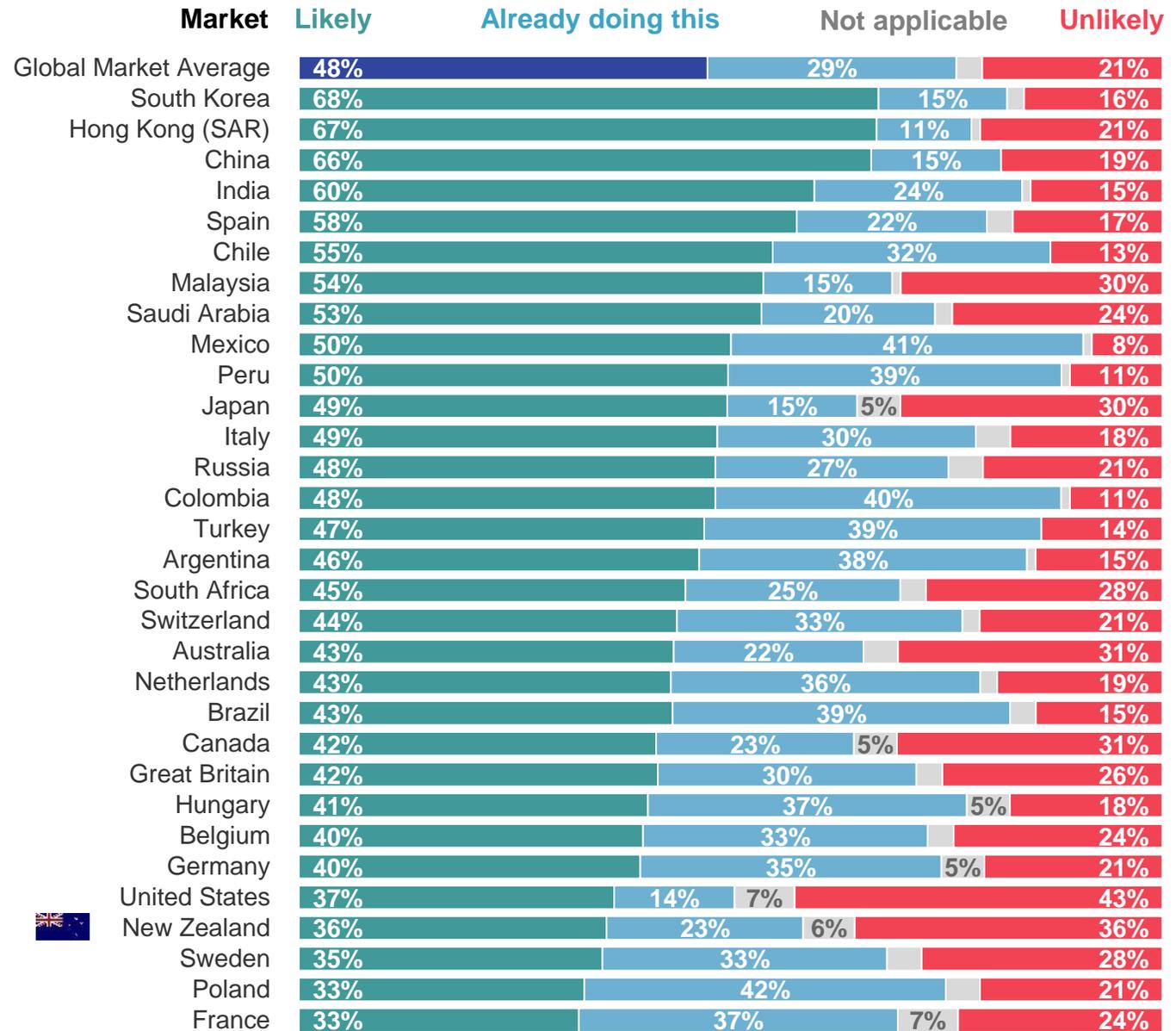




Likelihood of changing daily travel

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

- Walking, cycling or using public transport instead of driving a car or motorbike



Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010. Note: Only percentages 5% and over are shown.

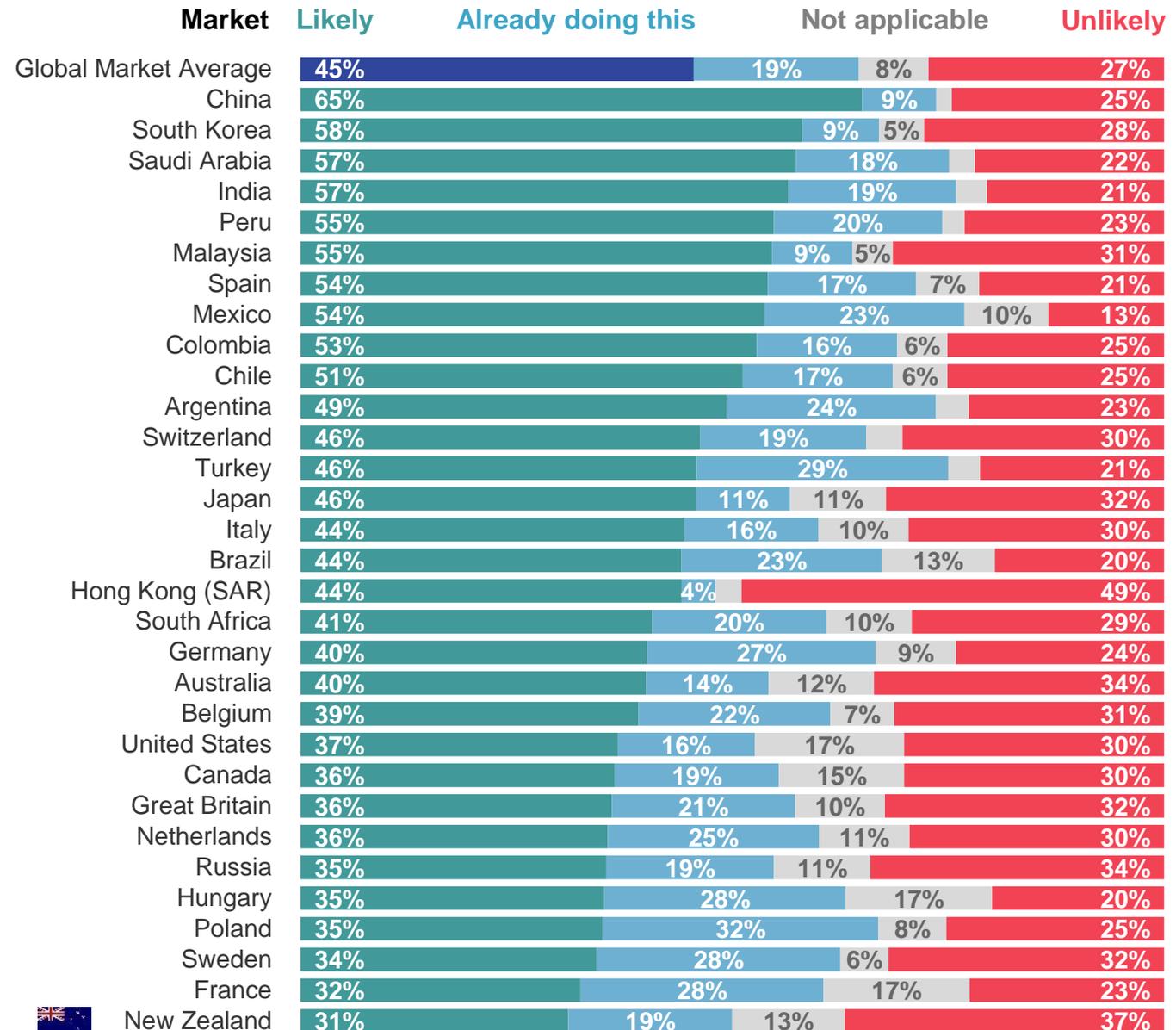


Likelihood of avoiding flying



Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

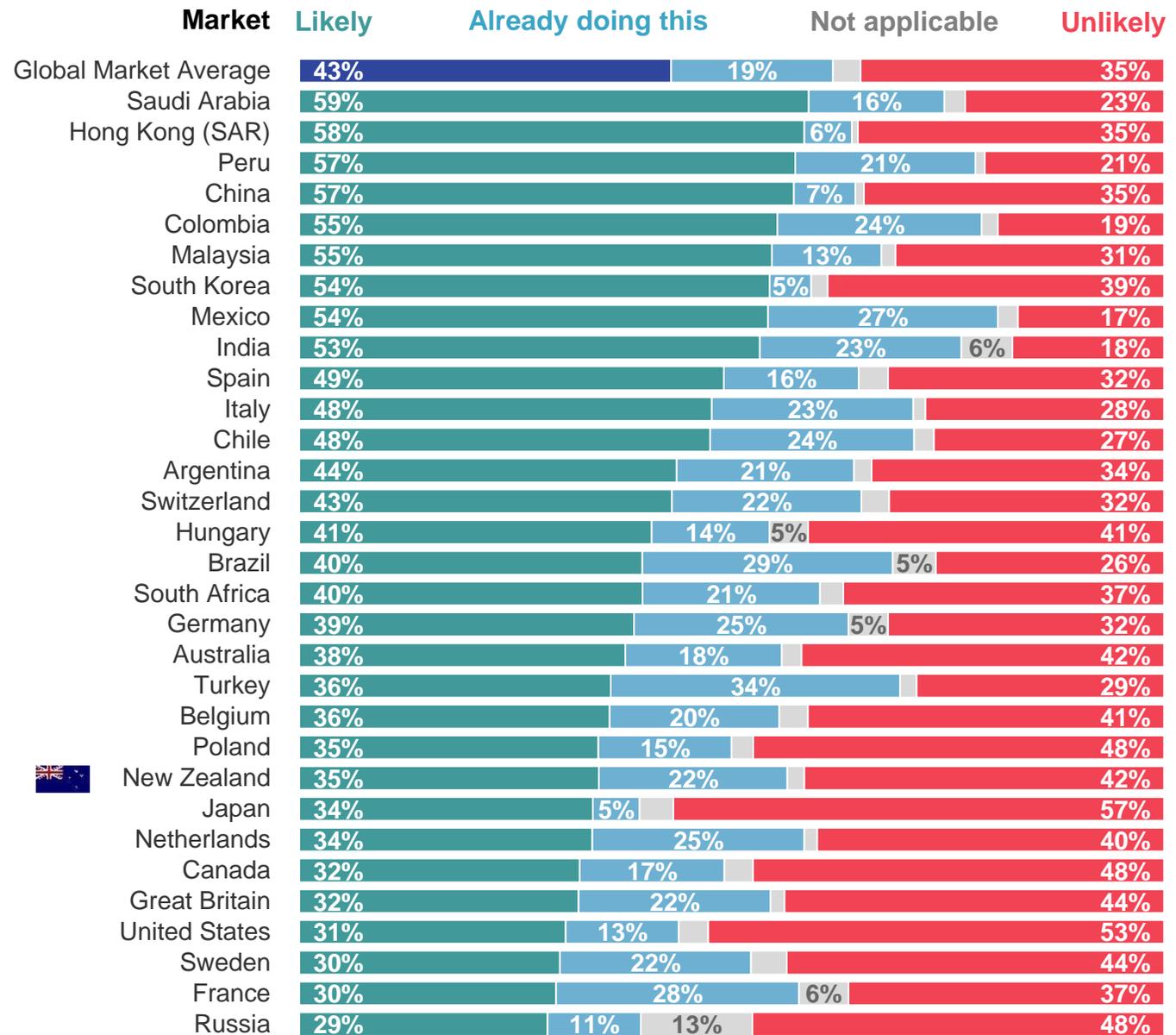
- Not flying, or replacing some flights with train or bus journeys



Likelihood of eating less meat

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

- Eating less meat or replacing the meat in some meals with alternatives such as beans



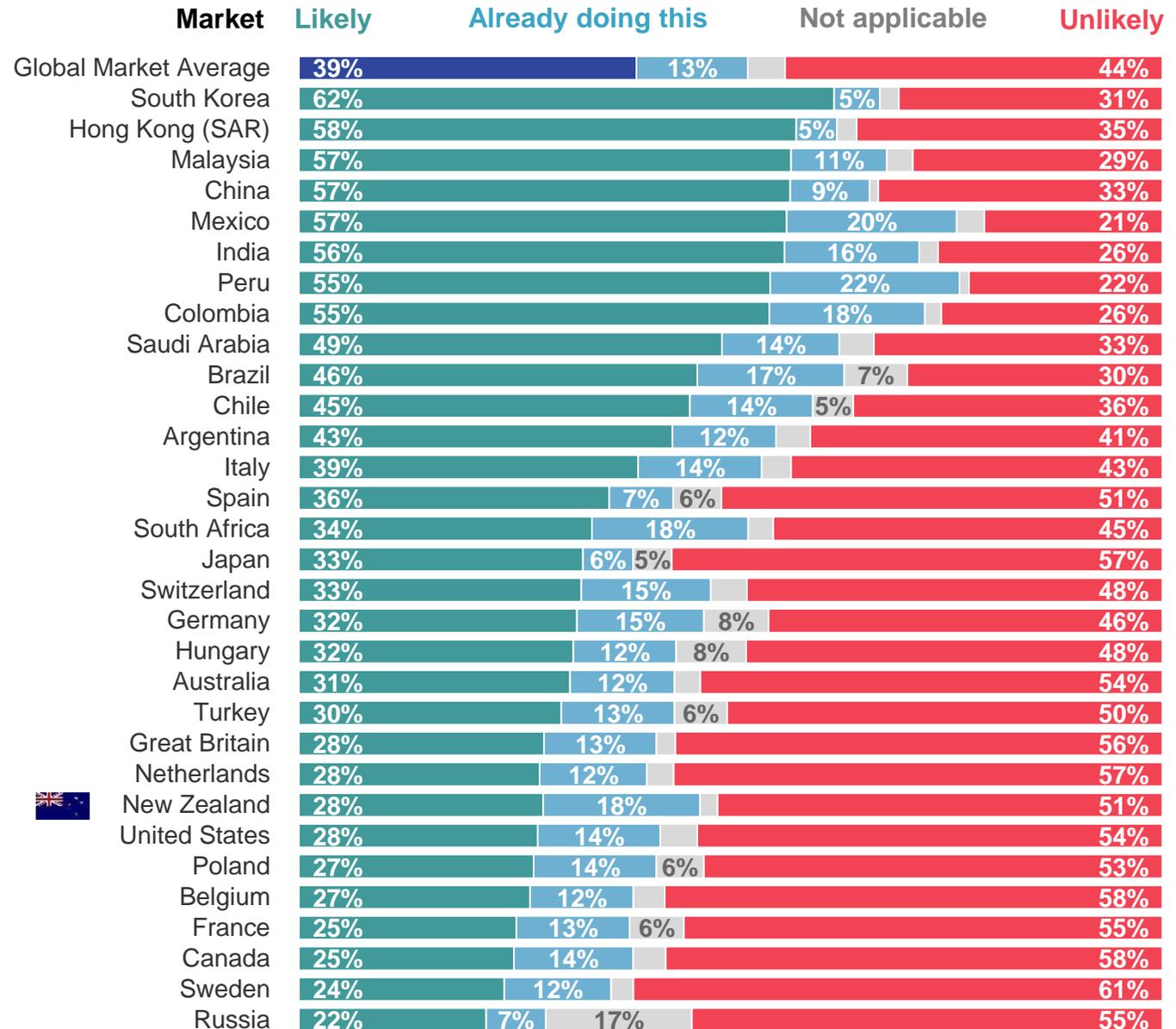
Base: Global market average (excl. New Zealand): n= 21,011; New Zealand: n=1,010. Note: Only percentages 5% and over are shown.



Likelihood of eating & drinking fewer dairy products

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

- Eating fewer dairy products or replacing dairy products with alternatives such as soya milk



These are the findings of the *Global Advisor* wave 152 (GA 152) – an Ipsos survey conducted between February 19 & March 5, 2021

The survey is conducted monthly in 30 markets around the world via the Ipsos Online Panel system.

The markets reported herein are Argentina, Australia, Belgium, Brazil, Canada, China, Chile, Colombia, France, Great Britain, Germany, Hungary, Hong Kong, India, Italy, Japan, Malaysia, Mexico, the Netherlands, New Zealand*, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Switzerland, Turkey and the United States of America.

For the results of the survey presented herein, an international sample of 21,011 adults aged 18–74 in the US, Canada, Hong Kong, Malaysia, South Africa, and Turkey, and aged 16–74 in all other markets, were interviewed. In case of New Zealand, adults aged 18+ participated in the survey.

Approximately 1,000+ individuals participated on a market-by-market basis via the Ipsos Online Panel with the exception of Argentina, Chile, Colombia, Hong Kong, Hungary, India, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden, Switzerland and Turkey, where each have a sample of approximately 500+. The precision of Ipsos online polls is calculated with a credibility interval, with a poll of 1,000 accurate to +/- 3.5 percentage points and one of 500 accurate to +/- 5.0 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.

18 of the 30 markets surveyed online generate nationally representative samples in their markets (Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, New Zealand, Poland, South Korea, Spain, Sweden, Switzerland and United States).

The samples in Brazil, Chile, mainland China, Colombia, Hong Kong, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey are more urban and educated, and/or more affluent than the general population. We refer to these respondents as 'Upper-Deck Consumer Citizens'. They are not nationally representative of their market.

**THANK
YOU.**

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