Change, Challenge and Choice

A New Zealand Consumer Lifestyles Study

University of Otago
Te Whare Wānanga o Otāgo
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Lifestyles Research Group

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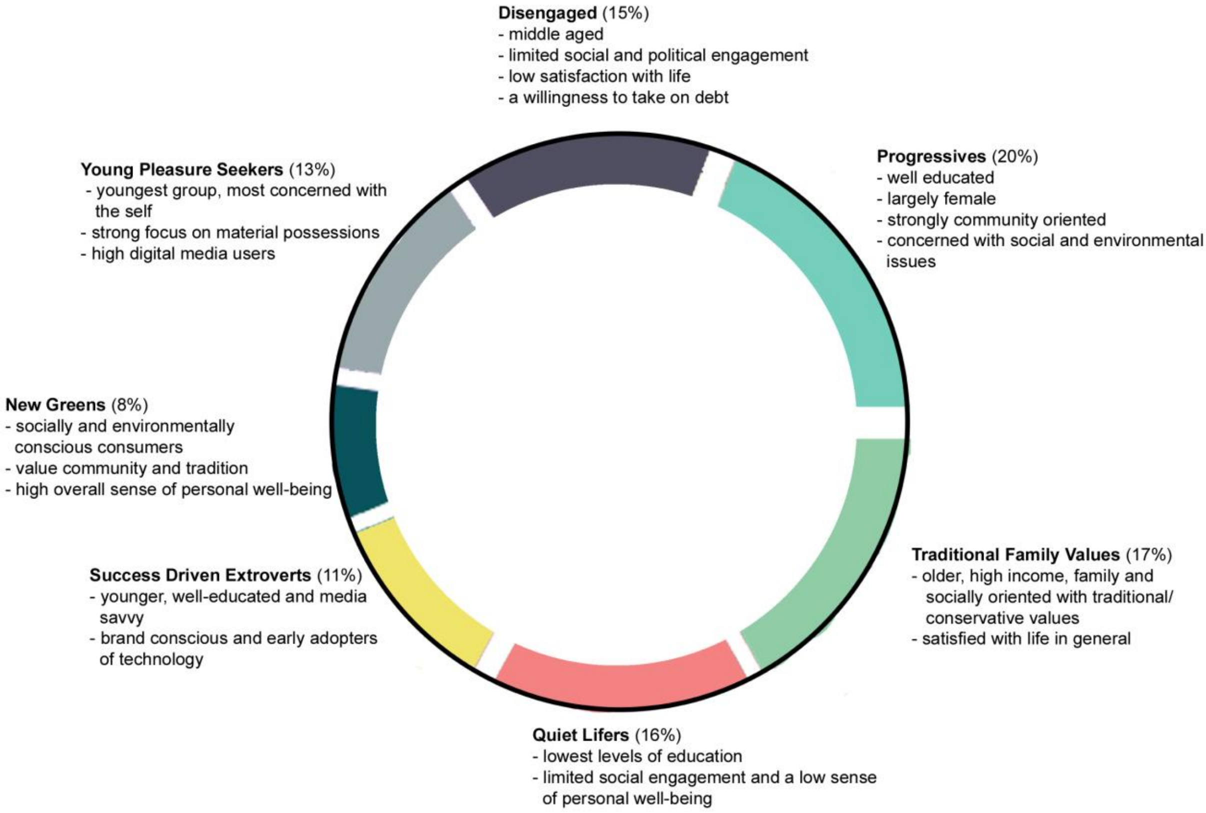
Contents

1 Introduction

This report details the results of a Consumer Lifestyles segmentation study of the adult New Zealand population. The project is part of an ongoing research programme conducted by consumer behaviour researchers at the University of Otago since 1979. Seven lifestyle segments were identified: the '**Progressives**', '**Disengaged**', '**Young Pleasure-Seekers**', '**New Greens**', '**Success-Driven Extroverts**', '**Quiet Lifers**' and '**Traditional Family Values**'. The discussion of the segments provides a number of new and useful insights into the contemporary world of the New Zealand consumer.



2 Background Information

The current Consumer Lifestyles segmentation study is the sixth major survey of this type carried out in the Department of Marketing at the University of Otago. As with previous iterations, the 2013 Lifestyle Study is designed to provide insights into the lifestyles, consumption patterns and choices, and behavioural trends of New Zealanders.

The report is based on responses to almost 600 questions about consumer attitudes, opinions and behaviours collected from NZ respondents. Data was collected from 2036 individuals in late 2013 using an on-line questionnaire covering a range of psychographic, consumption and lifestyle questions. Gathering responses was contracted to a commercial Australasian market research company. Our instructions were that the respondents should be over the age of 18 years and demographically representative of the New Zealand population in terms of age, sex, education, ethnicity and income.

The research design is based on previous studies carried out by the University of Otago in 1979, 1989, 1995, 2000 and 2005. Over the six iterations of the NZ Consumer Lifestyles survey, additional questions have been added to reflect new social trends, and some questions deleted to ensure the survey's ongoing relevance. Innovations in the current study include a focus on food and drink consumption, sustainable consumption behaviour, and happiness and well-being measures. It is also the first study to use an on-line survey to gather data.

As a preface to the current findings, a summary is provided of some of the major social and demographic trends since the 2005 study to inform and contextualise the changing attitudes and behaviours of New Zealand consumers.

2.1 Background Trends

A major influence on consumer lifestyles between the 2005 study and the current study was the 2008 Global Financial Crisis (GFC). While it could be argued that NZ has been shielded from the major consequences of this crisis, the effects of a general downturn in consumer confidence are reflected in a number of attitudinal and behavioural changes to those highlighted in the previous NZ Consumer Lifestyles survey. Some of the most significant changes identified in the present study are related to attitudes towards the environment, the importance of sustainability, the respective responsibilities of government and business, and the role of the consumer in a period of post-recession consolidation.

This period has seen inconsistent economic growth and major fluctuations in commodity prices in New Zealand's traditional export sectors, particularly in the export of dairy products, and, overall, a net increase in immigration. This latter feature is regarded as contributing to the housing shortage in New Zealand's major urban centres, particularly Auckland, and to the resulting inflation of property prices. Pressures on urban infrastructures especially transport systems, and the funding of public services such as education and health continue to feature prominently as competing priorities on government agendas. This period has also seen a major change in the political landscape with a shift from a labour to a national led government.

This study provides a detailed analysis of the psychographic patterns, attitudes and behaviours which characterise the 2013 NZ Consumer Lifestyle segments. While the composition and characteristics of the majority of these segments remain fairly similar to those identified in the 2005 study, changes to the largest segment, the Progressives, suggest that a number of shifts have occurred. These shifts, most notably those related to greater protection of the environment, increased responsibilities of business and wider concern with the welfare of the more vulnerable members of society, may reflect responses to the GFC and its consequences for both individuals and society at large.

2.2 Creating and Profiling the Segments

The segments were developed using *k*-means clustering which was developed for handling large datasets. In common with most other clustering algorithms *k*-means requires metric inputs so the clusters are formed using the data collected on opinions parts of the questionnaire. Almost 200 (191) questions were used as the base variables and several cluster solutions were derived with different numbers of groups ranging from five through to eight. These were checked for stability by repeating the clustering using different starting points. Separation between the groups was assessed by using discriminant analysis, which estimates the probability that each sample unit has of being assigned to each group. In the final Lifestyles clustering solution (the one presented here) 67.2% of the cases have above a 90% chance of only belonging to one lifestyle group and a further 10% have over an 80% probability of being allocated to a single group. The final choice of the clustering solution also depends on how well the solution predicts differences in the activities, interests and demographics of the respondents. Analysis of Variance (ANOVA), the Kruskal-Wallis *H* test and cross-tabulations with the χ^2 test were used to examine these relationships depending on the measurement level of the individual questions. As with all clustering the final decision is an informed judgement as to which solution offers the best face validity based on all the diagnostics obtained during the analysis.

Descriptions of the segments were developed by comparing the average values of the base variables across clusters, using ANOVA with Tukey's HSD test. The most discriminating variables were determined in two ways: by the largest effect size (quantified by ω^2) and also by the number of pairwise comparisons that were statistically significant at the 5% level from Tukey's HSD (which compensates for α-inflation).

In addition to profiling on the base variables, additional descriptor variables were compared across segments. Although these variables were not used to create the segments (because they are not scaled metrically e.g. gender and ethnicity) nonetheless some of them do differ appreciably across segments, and thus are helpful in developing a richer description of the nature of the people who have been assigned to that segment.

3 Changing Opinions

Consumers in this study are increasingly likely to avoid amassing credit card debt, engaging in more DIY activities and are more price and quality conscious than consumers in the 2005 study. Perhaps unsurprisingly, there is also a marked awareness of and concern with social issues and this trend is reflected in a shift towards more frugal consumption behaviours, including recycling and re-using, and by an increase in more positive attitudes towards protecting the environment. While frugality has been argued to be a desirable goal for societies and individuals and is recognised as a deliberate lifestyle choice, it should be noted that while for some it may be a conscious and voluntary decision, for those whose personal resources are already stretched or depleted, it may be as much a necessity as it is a choice.

There is a return to traditional values with significantly more consumers agreeing with statements such as "by returning to the standards of our grandparents, NZ would be a better place to live" and "obedience and respect for authority are the most important thing children should learn".

Despite increasing media exposure on the issue of foreign ownership there was no significant change in New Zealanders' belief that "there is too much foreign ownership and investment in NZ". Also interesting is that despite the 2007 smacking bill there was no significant change in New Zealanders' attitudes towards smacking.

On average, New Zealanders report a lower satisfaction with life as a whole (66% compared to 69% in 2005). Personal wellbeing – a concept consisting of seven life domains capturing various aspects including Satisfaction with Standard of Living, Personal Achievement, Personal Relationships and Future Security – shows similarly low results (63%, compared to 67% in 2005).

There were several items that stood out as representing attitudes New Zealanders felt particularly strongly about. New Zealanders strongly agreed that "Care of the elderly is an important social welfare issue", "NZ is a good place to live", "Exercise is important", "There is a growing gap between rich and poor", "Obesity is a serious problem" and, "My drinking behaviour is responsible". They strongly disagreed with the statements that "It is appropriate to market in schools", "Making a profit is the only responsibility of business", "What is good for business is good for us all", "It is ethical to advertise to children", "It is a good idea to buy now and pay later", "I keep my wardrobe up to date with fashion" and, "I sometimes think I should drink less".

3.1 Environmental Attitudes

There has been a significant change in New Zealanders' attitudes and opinions related to the environment. A large proportion of respondents in this study (47%) expressed concern that the government was not taking a more positive and constructive role in protecting the environment. Consumers are also dissatisfied with the quality of specific information provided on products, information they believe they need to make more sustainable choices (76% of respondents). They also strongly support a standardised labelling system for sustainable products and believe it is a corporate responsibility to provide it.

3.2 Attitude towards Politics and Business

In 2005 most New Zealanders were happy with New Zealand as a place to live, and did not support the idea that to get ahead it was necessary to go abroad, these attitudes have remained fairly consistent. However, consumers are happier with the amount of tax they pay, with significantly less people agreeing with the statement "people in NZ pay too much tax".

In the current study, there is a significant change in the way in which respondents view the role of business and government in relation to consumption. Part of this concern is related to the largely negative view that respondents have of business and what they see as its undue emphasis on maximising profits and its failure to recognise its social and environmental responsibilities. Attitudes towards business seem to reflect the view that greater emphasis should be placed on the consequences of its practice and that greater regulation should be introduced to encourage business to play a more positive role in protecting the natural resources upon which it depends. While the development of and commitment to more sustainable approaches to managing resources is seen as both a government and a business imperative, results also show that consumers are increasingly making their own contributions to a more sustainable future in relation to their own consumption behaviours.

Public opinion suggests people are significantly more satisfied with spending on health services than they were in 2005 but less satisfied with the amount government is spending on police. Significantly less people agreed with the statement "Our family is better off financially than we were a year ago".

3.3 Consumption Patterns

Consumers are significantly less happy with the prices they pay for consumer goods than reported in 2005. There is also a return to frugality and an aversion to borrowing with significantly more consumers agreeing that "I am willing to delay a purchase if it will save money", "There are many things I resist buying today so I can save for tomorrow", "Making better use of my resources makes me feel good", "If I can re-use an item I already have, there's no sense in buying something new" and, "I discipline myself to get the most from my money" than in 2005.

In the 2005 survey, respondents reported a growing concern with nutritional information on food, the avoidance of high cholesterol products and an increase in dining out. These trends have continued in 2013. The present study also indicates that the majority of participants (75%) were concerned not only about obesity in New Zealand in general, but with their own weight management in particular. There has also been a significant change in the way that New Zealanders consume and respond to healthy food choices. Nearly half the respondents believed that unhealthy food tasted better than its freshly cooked equivalent, and few reported knowing how to cook basic meals from scratch.

There have also been changes since the 2005 study relating to attitudes towards the consumption of alcohol. A large proportion (30%) of respondents believe that a drink or two at the end of the day is a good way to unwind; however, overall patterns suggest that an even larger proportion (33%) could be classified as heavy drinkers according to ALAC guidelines.

There are also significant changes to the media consumption behaviours of New Zealanders. Given the expansion and integration of digital media and communications it is not surprising that New Zealanders spend more time on-line than ever before and increasingly rely more on digital sources for their news and entertainment. They also continue to spend more of their consumption dollars on on-line purchases. That shopping is increasingly seen as a multi-channel, 24/7 web-enabled experience presents considerable challenges to traditional retail stores. Also of note is the increased opportunity to share retail experiences, both negative and positive, and to research product, price and service quality in local and global contexts which continues to characterise the contemporary consumer as the sophisticated customer identified in the 2005 report.

4 The 2005 Lifestyle Segments

The following is a summary of the segmentation clusters from the 2005 study:

Success-Driven Extroverts (16.1%): they are the urban-based, high income, innovative and status conscious segment. They are actively ambitious and value free enterprise.

Educated Liberals (9.4%): this segment appear to be the only consistently 'left wing' inclined group. They are progressive in their values and beliefs, and are largely egalitarian. They enjoy variety and diversity.

Pragmatic Strugglers (14.6%): they are concerned about getting a raw deal in life and clearly find money a difficult issue. They are politically conservative and have a generally negative outlook on life.

Traditional Values (17.5%): They are prosperous and very satisfied with life, with high levels of product ownership. They are family and community-oriented, and are generally conservative.

Social Strivers (14%): they demonstrate conflicts between what they want and what they can attain, and between attitudes and actual behaviours. They are outwardly-directed and are generally conformist.

Pleasure Seekers (13.8%): they display a lack of concern for social and political issues and demonstrate a very short-term focus. They live to enjoy today with few commitments and little regard to the future. They are generally materialistic.

Conservative Quiet Lifers (14.9%): they are generally older with a longer life expectancy. They are home-centered, and traditional.

A summary of the new segments, followed by a detailed discussion of each, and the changes since 2005 follows.

5 The 2013 Lifestyle Segments

Cluster	Characteristics
Progressives (20%): Well educated, largely female, strongly community oriented, concerned with social and environmental issues.	Likely activities: visiting libraries, art galleries theatres. Gardening, DIY, tramping. Interests & Opinions: strong support for and involvement in their community and the segment most concerned with social welfare and equity issues. They are non-materialistic, regularly re-cycle and re-use and are strong in their support for greater environmental protection. Politically the most left (51%), they favour cooperation over competition and believe that business should be more socially-responsible. Demographics: Predominately late middle age (median age 49), mostly female (64%) and university educated (43%)
Disengaged (15%): Middle aged, limited social and political engagement, low satisfaction with life, a willingness to take on debt.	Likely activities: reading books, magazines and newspapers, eating takeaways Interests & Opinions: least interested in social, political and environmental issues and most likely to believe that there are no major problems facing NZ society. They are positive towards increased privatisation of public services and consider NZ businesses to be responsible and adequately regulated. They have little interest in cultural and artistic pursuits and low involvement in community activities. Overall, this segment has the lowest level of satisfaction with life as a whole. Demographics: Predominately middle-aged (median age 40), comprised the second highest proportion of males (57%) and least number of university educated (25%)
Young Pleasure Seekers (13%): Youngest group, most concerned with the self. Strong focus on material possessions, high digital media users.	Likely activities: like to take regular holidays, participate in team sports, and are high users of digital media, especially in relation to movies and music. Interests & Opinions: not concerned with or overly informed about social, cultural, political or environmental issues. Could be described as self-absorbed and self-centered, particularly in relation to their emphasis on material possessions and attitudes to consumption. Demographics: youngest (median age 29), more females (60%) and 31% university educated.

New Greens (8%): Socially and environmentally conscious consumers. Value community and tradition, high overall sense of personal well-being.	Likely activities: hosting visitors, visiting cultural events and venues. Interests & Opinions: strong and explicit moral values and are well-informed and highly concerned with social, political and environmental issues. They support gender equality and workers' rights and while they believe that "tax is too high" they are in favour of competition They believe that the environment needs greater protection and that government should do more to help. In their own way, they live simply, re-cycle and re-use and believe that they have a responsibility to help protect the world from the consequences of over-consumption. They are interested and involved in their communities and value culture and tradition. This segment has the high levels of satisfaction with life and personal well-being. Demographics: younger (median age 35), slightly more female (58%)
Success Driven Extroverts (11%): Younger, well-educated and media savvy. Brand conscious and early adopters of technology.	Likely activities: watching movies, individual and team sports, listening to music Interests & Opinions: early adopters of technology, keen interest in popular social and cultural trends and conspicuous consumers of brands. They endorse a market-driven view of business, emphasise the importance of profit generation and are most likely of the segments to be politically centrist (72%). Demographics: predominately late Generation Y (median age 34), slightly more females (55%) and second-most university educated (41%)
Quiet Lifers (16%): Lowest levels of education. Limited social engagement and a low sense of personal well-being.	Likely activities: limited social engagement, preferring simple, inexpensive home-based forms of entertainment. Interests and Opinions: the second-most politically left (26%) but with little social or environmental interest or concern. A consistent sense that they have neither the opportunity nor motivation to contribute to change. Unsurprisingly, this segment is likely to feature individuals with low levels of satisfaction with life and personal well-being. Demographics: late middle age (median age 50), least university educated (15%)
Traditional Family Values (17%): Older, high income, family and socially oriented with traditional/conservative	Likely activities: socially engaged with regular hosting of dinner parties and social functions. Enjoy gardening, DIY, reading newspapers and

values. Satisfied with life in general.	listening to the radio. Interests & Opinions: they are family orientated, involved in voluntary work, give regularly to charity and frequently attend cultural events and church activities. The most politically right (46%) they are confident that NZ is prospering, agree that business takes its responsibilities seriously and that current social welfare priorities are fair and reasonable. This segment is satisfied with life in general and with their own personal sense of well-being in particular. Demographics: oldest (median age 54), predominately male (63% male) and with the highest level of income.

Segment One: Progressives (20%)

The 'Progressives' segment is proportionally the largest segment of the adult New Zealand population at just under one-fifth of the total. They are characterised by left leaning political beliefs, strong community involvement, concern with social welfare and equity issues and are positive in their support for greater environmental protection.

In terms of their demographic characteristics, this segment contains a higher number of females and is less likely to comprise individuals of Chinese or Indian descent. They have a higher average age than most of the segments, with a majority in the 55–64 age range. This segment is the most likely of all the segments to have completed a university qualification.

They have strong beliefs on certain subjects. For example, they firmly believe that advertising to children is unacceptable; however, they believe that smacking is an appropriate way to discipline children.

Their strong community involvement is reflected in their opinions on business and the role that it plays in society. For example, they feel private companies have a responsibility to society and believe that an exclusive focus on maximising profits can come at an unacceptable cost. They also believe that the government needs to spend more money protecting the environment and on social welfare such as care of the elderly. In keeping with their pro-social and environmental concerns, they regularly recycle and re-use and do not regard material possessions as important. They consider that the gap between the rich and the poor is increasing and are the least satisfied of all segments with the state of New Zealand's environment, its business practice, and with the government's social welfare policies.

Their community involvement is also reflected in their higher likelihood than other segments to volunteer and give to charity. They are also likely to engage with the community and regularly visit libraries, art galleries and the theatre. This segment also likes to keep busy with gardening, DIY, arts and crafts, tramping and camping, and reading books, magazines and newspapers. They enjoy going to the gym but are unlikely to participate in team sports. They are not heavy computer users and prefer to purchase rather than download forms of entertainment.

In terms of their food habits, this segment is the most informed and more likely than other segments to correctly identify healthy and non-healthy foods. They are the most likely segment to buy and cook fresh produce and believe that the tastiest foods are also the healthiest. Accordingly, they avoid fizzy drinks, fast foods and takeaways and are the segment most likely to skip dessert.

Segment Two: The Disengaged (15%)

'The Disengaged' make up one of the smaller segments at 15.4% of the sample. In terms of their demographic characteristics, the Disengaged are more likely to be male and New Zealand European (68.1% of the total proportion of the segment). In terms of ethnicity, very few Indians and Chinese belong to this segment. Their educational achievements are most likely high school qualifications, with only a few having university qualifications.

The Disengaged have narrowly defined and arguably uninformed social and political opinions. They are relatively unaware of, and have little interest in, social and political issues and, while they do not think that New Zealand is a great place to live, they do not believe that the country is facing any major challenges. Contemporary concerns with growing levels of obesity, care of the elderly and increasing environmental degradation, for example, are not shared by this segment.

The Disengaged are least likely to think that justice is the most important requirement for a fair society and they don't think the number one principle for establishing laws is treating everyone fairly. They do not believe that moral standards are declining or that New Zealand is becoming a more dangerous place to live. This aligns with their beliefs that the law does not need to be tougher on lawbreakers or that discipline in schools is inadequate. They do not go out of their way to buy locally or to be 'ethical consumers', and have little motivation towards promoting fair wages and incomes for workers and producers.

In keeping with their views that degradation of the environment is not a pressing concern, this segment believes that corporations do not need to be regulated and can be trusted to voluntarily protect the environment. They do not support standardised labelling systems for green or ethically produced products and have little to no motivation in regards to re-using and recycling. They trust businesses are interested in serving customers over just pure profit and are also happy with the privatisation of public services. The Disengaged do not believe the gap between the rich and poor is growing in New Zealand.

The Disengaged are the segment least likely to undertake volunteer work or give to charity. In terms of their activities and interests, they are not likely to do home activities such as DIY, gardening and arts and crafts, nor do they attend art galleries or visit the library. However, they do often read books, magazines, or newspapers. The Disengaged do not believe exercise is important and this is reflected by their decreased likelihood to visit the gym or participate in individual sport.

Their health beliefs in regards to exercise are also reflected in their food choices. Their food habits are in contrast to those in the Progressives segment, and are characterised by their regular choice of takeaways and their reluctance to eat fruit and vegetables and to cook food from scratch. They are the segment least able to choose a healthy meal or to identify healthy fats.

In terms of their core personality and characteristics, the Disengaged are the segment most likely to disagree that life is too short or that time passes by very quickly. They believe what they do doesn't matter and they find it difficult to get absorbed in their work. They claim to have spent very little time thinking about how they fit into the big picture of life and don't believe their life has a lasting meaning. Overall they report very low levels of satisfaction with life.

They are not concerned with making the most of their resources and will not hold off on purchasing items in order to save money. In contrast, they simultaneously would like to own a few more possessions and they will borrow money to ensure this happens. This is reflected in their choice to take on debt when they desire something and the fact they are not always cautious or price conscious. When purchasing they are not concerned with quality, product safety or brand loyalty but rather with satisfying their desires for possessions.

The Disengaged do not see themselves as self-directed in terms of creativity, curiosity or setting their own goals and are least concerned with the well-being of future generations. They do not value tradition, conformity, or security and agree that universalism and benevolence are personality traits they do not have. In addition, they do not identify themselves with social power or authority and feel both inconspicuous and unmotivated.

Segment Three: Young Pleasure Seekers (13%)

This segment comprises 13.2% of the sample. 'Young Pleasure Seekers' are more likely to be in the 20–29 age group, female, and to include individuals of Chinese descent. They are very likely to have, or be working towards, a university degree, do not own their own homes and are likely to be located in urban centres.

Young pleasure seekers have few opinions on social and political issues. For example, they are not concerned with the propriety of advertising to children, nor do they believe the government should take measures to reduce differences in income levels. They are likely to take regular holidays and have a high regard for personal possessions.

In terms of their lifestyle choices, Young Pleasure Seekers participate in team sports and enjoy going to the movies. They are least likely to do gardening, go hiking or tramping. They are also unlikely to participate in community activities, do volunteer work or give to charity.

Their food habits are a reflection both of their age and their more care-free lifestyles. They do not often make food from scratch or eat fresh fruit and vegetables. They often snack between meals, regularly consume confectionary and fizzy drinks and while they make a conscious effort to avoid gluten they do not avoid salt.

This segment is very media savvy with 99.9% of the group, demonstrating regular Internet use. Avoiding traditional media such as magazines and newspapers, this segment is happy streaming and downloading their media content. Self-absorbed, they describe themselves as rarely being distracted by what is going on around them. Overall, the characteristics of this segment have remained relatively stable over the two waves. The Young Pleasure Seekers segment share a number of commonalities with segment five, the Success-Driven Extroverts (discussed below) in terms of valuing materialism and in relation to their food consumption, however, the former is defined by their notable disinterest in larger political and social issues, whereas the latter is defined by their personality characteristics and drive for success.

Segment Four: New Greens (8%)

The 'New Greens' is the smallest segment, at 8.4% of the total New Zealand adult population. They have strong opinions which they see as providing distinct differences between themselves and others. They report high levels of satisfaction with life as a whole and high levels of personal well-being.

This segment is not characterised by either gender or age but there is a slightly larger proportion of young adults. New Greens are more likely than other segments to contain people of Indian descent, students and people with children at home.

New Greens have strong opinions on morals and life in New Zealand and they are keen to keep up-to-date and be well-informed in relation to social and political issues. They are likely to believe that women should have a career outside of the home and that working parents should have more flexibility to spend time with their children. They believe that workers' rights are important; they are strong supporters of unions and consider that the tax rate in New Zealand is too high.

This segment believes that New Zealand would be a better place to live if we returned to the standards of our grandparents and think that courts should be tougher on law breakers. They believe justice and equality are essential to provide a fair society and they have a strong sense of community.

They suggest that compassion for those who are suffering is an important personal and social virtue and that social welfare such as care for the elderly and health issues such as obesity are serious problems that need to be addressed They strongly believe that men and women have different roles to play in society but within the parameters of equality.

In terms of their beliefs in relation to the environment and corporations, New Greens buy from companies with a strong record of protecting the environment, and will buy environmentally friendly products even if they do not work as well as other products. They believe that the government should spend more on protecting the environment and that we need to change our behaviours to ensure the planet stays healthy.

Their food and exercise choices are reflected in their health-oriented lifestyles. While admitting to enjoying takeaway meals, New Greens describe themselves as health conscious, they compare labels to find the most nutritious foods and make an effort to avoid fat and control their cholesterol intake. They believe more emphasis should be placed on physical activity in schools.

Their consumption decisions are motivated largely by their environmental focus. They are not strongly price sensitive but do appreciate quality which they respond to with a high degree of brand loyalty. They believe debt is a burden, but recognise that credit has become an essential part of living.

In terms of their lifestyle choices, the New Greens are social and often have visitors to stay. They may be involved in the church and often give to charity. They are regular visitors to art galleries, their local library and enjoy arts and crafts and playing team sports. They read online health blogs and search online for medical advice.

Their self is well-defined and they are the segment most likely to agree that life is too short and time passes by very quickly. They believe what they do does matter and they find it easy to get absorbed in their work. They claim to have spent a lot of time thinking about how they fit into the big picture of life and believe their life has a lasting meaning. New Greens believe that they have a responsibility to make the world a better place. They are concerned with making the most of their resources and will hold off on purchasing items in order to save money. They would like to own a few more possessions and they will save to ensure this happens. They enjoy living simply and serving as a role model to promote the well-being of the next generation.

The New Greens are comfortable with their individuality and independence but they also value their interactions with other people. They are happy to consult and discuss matters with those for whom they have respect. New Greens define themselves as ambitious and self-directed and while they enjoy a degree of indulgence, they also value tradition and benevolence. The New Greens rate themselves highly on extraversion, self-discipline, open mindedness and their ability to sympathise with others.

Segment Five: Success-Driven Extroverts (11%)

This segment makes up just over one-tenth of the sample. They are well-informed in terms of emerging and popular social and cultural trends and are early adopters of technology.

The 'Success-Driven Extroverts' are likely to be between 25–34 years of age and feature a high proportion of Indian and Chinese ethnicities. There is an equal gender split and a relatively high proportion of individuals with university qualifications.

In terms of their beliefs regarding the responsibilities of corporations, Success-Driven Extroverts strongly believe that a company's only function is to deliver profits to its shareholders, and they endorse marketing in schools and advertising to children.

In relation to their consumption patterns, Success-Driven Extroverts are most likely to keep their wardrobe up-to-date with expensive brands. They are also early adopters of hybrid cars and alternative energy sources such as solar and wind. They enjoy spending money impulsively on impractical things and believe that some of life's most important achievements include acquiring material possessions.

This segment is the least likely to eat fresh fruit and vegetables or to prepare meals from scratch. A large proportion of those in the Success-Driven Extrovert segment is unable to identify low fat/high fiber options and is unlikely to visit health related blogs for advice and information. In their spare time Success-Driven Extroverts go to the movies, play individual and team sports and listen to music.

There have been some small changes in the profile of this segment between the last two waves of the Lifestyles project. Firstly, the gender balance in this segment has changed from being largely male in 2005 to an equal gender split in 2013. This difference could be the result of women delaying having children with the median age for New Zealand women to have their first child in New Zealand being thirty years of age (Statistics New Zealand). The second trend is the move away from fresh fruit and vegetables from 2005 to 2013. It is possible that the trend away from fresh food in 2013 is partly driven by their career ambitions and busy social lives which have left them time poor.

Segment Six: Quiet Lifers (16%)

This is the third largest segment of the sample. The 'Quiet Lifers' segment has a large proportion of 45-60 year olds who are likely to have achieved school certificate and be either unemployed or retired. The average income of this segment is less than all other segments.

While they do not have particularly strong views relating to the environment, they do not trust environmental claims on products and are unlikely to change their purchasing habits based on a company's social or environmental commitment. In terms of their lifestyle interests and activities, the Quiet Lifers are the least likely to entertain friends or to host dinner parties. They are unlikely to volunteer or give to charity and are not regular visitors to art galleries, sports events, libraries, movie theatres or gyms. They do not participate in team or individual sports, nor do they read health blogs. They are more likely to obtain their music via streaming.

Quiet Lifers is the segment least likely to have spent a lot of time thinking about what life means and how they fit into the big picture. In one sense, they are rationalists as they do not believe their life has a lasting meaning, nor do they feel that they have a responsibility to society to make the world a better place. They also lead relatively simplistic lives that are aligned with their consumption patterns and personal beliefs. For example, they do not go out of their way to enjoy themselves, nor do they lose themselves in their work. Quiet Lifers are the least satisfied of all the segments with future security, their achievements, and their health. They believe their families are worse off financially than the previous year and spend less family time together. They are quite self-sufficient and do not rely on or seek advice from their friends when making important decisions. Quiet Lifers report low levels of satisfaction with life and are particularly unsatisfied with their own personal well-being.

Segment Seven: Traditional Family Values (17%)

At 17% of the sample, this is the second largest segment. They are characterised by their conservative views and their family orientation. The 'Traditional Family Values' segment has the highest average age of all segments with a large proportion of members over 65. As expected, they are more likely to be retired and least likely to be studying. Those that are still in work are in the highest income bracket ($120k+). They are the segment most likely to have no children still at home. They are more likely to be male and of European descent and regard spending time with family as extremely important. They are satisfied with life and have high levels of personal wellbeing.

In terms of their social and political attitudes, the Traditional Family Values segment believes that New Zealand is a good place to live and that it is not necessary to go overseas to get ahead. This segment is the most likely to disagree with trade union action, same-sex marriage, and increased spending on social welfare. They are the least likely to think it is morally wrong that rich children inherit much more money than poor children and they believe that businesses are socially responsible.

In relation to their eating habits, they often eat fruit and vegetables and are the segment most likely to eat breakfast. They also have a sweet tooth and are likely to eat dessert and snack on biscuits and cakes. Their lifestyle habits and choices are characterised by an enjoyment of social interactions and they often host dinner parties. This segment is highly involved in voluntary work and often gives to charity. They enjoying getting out and attending sports events, playing individual sports, walking, visiting cultural events and participating in church activities. They also enjoy gardening and DIY. They rely on traditional media and spend time reading books and newspapers, and listening to the radio. They admit to being impulsive when purchasing but are able to make clear choices when faced with competing appeals. They describe themselves as organised and careful.

6 The Lifestyle Segment Changes from 2005 to 2013

Several of these segments are still clearly recognizable in the seven segments identified in the 2005 survey but with some significant changes. The *Progressives* are comparable to the *Educated Liberals* of the 2005 Lifestyles Study. Interestingly, they have increased from 9.7% to 19% of the sample. This segment is characterised by their concern for the environment, concern for others, and living a healthy lifestyle. Significant differences between the two waves are also noteworthy. In particular, the Progressives (2013) appear less satisfied with government and business practices than did the Educated Liberals (2005). These differences could be due to changes in Government between the two waves with a major swing from Labour to National.

Young Pleasure Seekers, are very similar to 2005, they attempt to make the most of what they have and generally are not strongly politically or socially motivated. *Success Driven Extroverts* are very aware of their social status and take considerable care of their self-image. They are most comparable to the 'Success Driven Extroverts' of the 2005 study. The *(Conservative) Quiet Lifers* segment has remained fairly stable from 2005 to 2013, as has the *Traditional Family Values segment.* The *Disengaged* is a new segment that does not align with previous segments from 2005. It is possible that their circumstances have shaped their attitudes, and they feel disconnected from their wider surroundings. The *New Greens* also represent a new segment that does not clearly align to any segment from 2005. Their opinions represent many progressive, egalitarian and humanitarian attitudes which are also reflected in their moral attitudes towards justice and their concerns with fairness and equality.

7 The Authors

The research team is based in the Department of Marketing at the University of Otago. This iteration of the study was generously funded by Prof. Rob Lawson and led by Leah Watkins, along with Rob Aitken, Sanna Ganglmair-Wooliscroft, Damien Mather, Kirsten Robertson and John Williams.

Professor Rob Lawson has been involved in five New Zealand consumer lifestyles studies. The current focus of his research is on household energy behaviours and understanding the adoption of energy efficient practices and technologies.

Dr Leah Watkins' area of academic interest lies in Marketing and Society, including research on culture, values, lifestyles, ethical business/consumption, and consumer socialisation.

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Dr Alexandra Ganglmair-Wooliscroft's interests are based in Macromarketing and Consumer Behaviour, looking at the connections between well-being / happiness and consumption. Currently she is particularly interested in sustainable, ethical consumption behaviour.

Dr Damien Mather's interests include brand trust, brand crises and corporate apologies, brand performance methodologies, brand extensions, brand share predictive models, best-worst scaling methodology, acceptance of GM foods, food labelling, county-of-origin and made-in labelling, eco-social conscientious consumption, data mining and branding in China.

Dr Kirsten Roberston's research interests include consumer behaviour and public policy, in particular in relation to food, alcohol, and violence.

Dr John Williams' research interests include Macromarketing, Marketing Theory, Marketing Ethics and research design and quantitative data analysis.

Cathy Hinder and Anahita Paul are both Postgraduate Research students in the Department of Marketing at the University of Otago who also assisted with the study.

8 Related Publications

Aitken, R. and Watkins, L. (2014) Sustainability, Silence and Social Responsibility. The Fourth Annual Asian Conference on Sustainability, Energy and the Environment, Osaka, Japan.

Faris, F., Lawson, R. and Todd, S. (1996) New Zealand Towards 2000 – A Consumer Lifestyles Study. Dunedin - Department of Marketing, University of Otago.

Lawson, R., Evans, S., and Todd, S. (2006) New Zealand in the 21st Century – A Consumer Lifestyles Study. Dunedin - Department of Marketing, University of Otago.

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