New Zealand in the 21st Century

A Consumer Lifestyles Study

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1.0 INTRODUCTION

1.1 PROJECT BACKGROUND

The 2005/6 consumer lifestyles segmentation study is the fifth major survey of this type carried out by the Consumer Research Group at the University of Otago since 1979. As with previous iterations, the 2005/6 study of New Zealand consumers is intended to provide marketers and advertisers, as well as other interested observers of New Zealand society, with an insight into the psychographic patterns and behavioural trends of consumers. The survey has now established itself as one of the major studies that offers insights into New Zealand society and the changes that are taking place within the context of political and technological forces that are altering the shape of life across the globe.

The Consumer Research Group is based within the University of Otago's Department of Marketing, and this iteration of the study was jointly sponsored and funded by Loyalty NZ and NZ Post, together with funding from the University of Otago Research Grants Committee. Questionnaires comprising more than 500 individual questions were sent out to 10,000 New Zealanders in November 2005, with an effective response rate of 36% obtained.

The design of the project is grounded in that of previous studies. The first of these was carried out in 1979 jointly with Heylen Research. After a period of ten years it was repeated in 1989 and, since 1995, it has been conducted at regular five yearly intervals. Throughout this time the survey has been updated to take account of new trends that have emerged in society, especially those based on technological innovations which affect our domestic, social and working lives. Innovations in this phase also include new measures designed to assess satisfaction with quality of life in New Zealand, as well as social desirability, (a personality trait that can affect responses), pet ownership and questions on commuting to work.

1.2 THE AUTHORS

The research team consisted of Sian Evans, Rob Lawson and Sarah Todd. Rob is Professor of Marketing at Otago and has been involved in all the studies since 1989. Sarah is Associate Professor of Marketing and has been involved in the last three surveys. Sian completed her PhD at Sheffield Hallam University in England in 2005 and joined the Department to work on this project.

2.0 BACKGROUND TRENDS

The 2005 survey took place at the end of a five year period that had seen strong economic growth, especially in the earlier part when strong commodity prices had lifted performance in New Zealand's traditional export sectors. Higher levels of immigration during this same period also contributed to this growth and lead to aggressive increases in property prices throughout the country. The rise in property prices has clearly benefited those in the population who were already in the market but has made it more difficult for others trying to establish themselves. In the latter part of the period, this has put pressure on inflation which the Reserve Bank has tried to control by raising interest rates to the highest levels in the developed world – a potential problem for some consumers experiencing high levels of debt on credit cards and other loans. On the other hand, the strong economic growth has led to the lowest levels of unemployment for some decades, with skill shortages in certain areas and resulted in improved resources for some of the poorer lifestyle segments identified in our research.

On the world stage, the last five years have been dominated in the media by 'the war on terrorism'. Although New Zealand maintained independence during the main conflicts, there has been involvement in attempted reconstruction in Afghanistan and Iraq. Incidents in Bali have also brought these conflicts closer to home and the level of attention given to these issues is bound to result in some changes of opinions within society. Such conflicts have also affected New Zealanders in the form of increasing oil prices and some scientists clearly see this trend as one that will continue, forcing major adjustments to our lifestyles as car ownership and personal travel choices may become limited. New Zealand has not seen evidence of these effects yet, with the travel issues that have dominated our attention in the last five years largely being concerned with congestion in Auckland and Wellington, and the affordability of both new road options and public transport systems.

In terms of success on the world stage, perhaps the major achievement recognised by New Zealanders has been in the arts arena. The global success of 'Lord of the Rings' gave New Zealand genuine international exposure. One effect of this has been increased awareness of the New Zealand landscape with all the 'Middle Earth' associations. Another result has been the establishment of a reputation for creativity and production that has been built upon by an impressive list of other films such as 'Whalerider', 'The Chronicles of Narnia' and 'The World's Fastest Indian'.

3.0 CHANGING NEW ZEALAND OPINIONS

3.1 POLITICAL FEELINGS

In 2000/1 we reported that New Zealanders did not feel as positive about life in New Zealand as five years previously. We are pleased to report that this has changed and that sentiment towards New Zealand as a place to live has improved on many measures. There is less agreement with the suggestion that one needs to go overseas to get ahead or that most of what is good is borrowed from overseas. Similarly, opinions on the quality of New Zealand-made products are more positive and sentiments appear to be changing regarding some racial issues. More New Zealanders now dispute the fact that we need a larger population and hence do not support higher levels of immigration but, for the first time since 1995, there is now less suggestion that people believe racial problems are worsening. With regard to political policy, health and education are reinforced as the main priorities that people see for government expenditure, followed by police services and the environment. One major change since the 2000 survey is the growth of a very strong belief from all sections of the community that people in New Zealand are now paying too much tax. (It should be remembered that the survey took place two months after the 2005 election in which this was a main issue for debate.) It is also interesting to report that the numbers supporting a change in the flag have increased, while those favouring the move to a republic have not changed. Clearly these are considered as separate issues by many in the population.

Last time we also reported an improvement in people's attitudes towards business in New Zealand. This trend continues. While views on the profit levels earned by business have remained unchanged, there is less concern about corruption and more pro-business attitudes expressed in relation to environmental concerns affecting developments. At the same time, there is increasing agreement with the suggestion that workers should have a larger say in management issues, although this does not necessarily translate into more positive feelings about the role of trade unions.

3.2 INDIVIDUAL CHANGES

At the individual level, there is a noticeable trend towards more conservative or traditional viewpoints. There is more agreement that the pace of change is too fast and that New Zealand has taken too liberal a perspective on many issues. For example, there is increased support for stronger censorship, together with stronger belief that the young have too many privileges, and that more discipline is required in schools. In line with this, personal values can be seen to be changing across the country. There is less concern with equality and inner harmony as guiding principles, but more emphasis is being placed on tradition, authority, politeness, honouring one's parents and attaining social recognition. In part these may be a response to the disturbed international situation. Concerns over terrorism and consistently reported violence and insecurity from around the world are likely to make individuals express caution about the future and to look back favourably on times when these issues were less prominent.

3.3 FAMILY RELATIONSHIPS

Increased concern for tradition is also reflected in less agreement with the notion that marriage is an outdated institution. In part this could be a reaction to the establishment of civil unions in the period between our two surveys, and it also reflects recent studies indicating that the number of marriages has in fact risen. In most other respects there are few changes in opinions regarding family relationships. However, people indicate a willingness to spend more time at home as opposed to going out for entertainment, and there is increased concern that working fathers and mothers do not spend enough time with their children. This sentiment is much stronger regarding working women, possibly again indicating a more traditional view of family roles and responsibilities.

3.4 CONSUMPTION ISSUES

The index of consumer sentiment that is embedded into the survey shows little change over the five year period, with very similar opinions being expressed concerning advertising, product quality, prices or service levels. Although consistent with the increased support for stronger censorship noted above, there is also a more strongly held view that too much sex is used to sell things by advertisers.

However, as opposed to views of the actual market place, there are some interesting changes in how people see **themselves** as consumers. Compared to 2000, there are indications that we are more concerned with both product quality and service, and also place increased emphasis on sticking to well known brands. However, these trends do not mean that New Zealanders are less concerned with prices. At the same time, more people are saying that they monitor prices and are more prepared to respond to ‘specials’ and other deals on prices. These indications, together with other measures in the survey, indicate New Zealanders are possibly becoming more sophisticated consumers.

Consistent with this apparent increased sophistication, more New Zealanders claim that they use independent sources like ‘Consumer’ magazine and that they also check labelling for nutritional information. More people also claim that they make special efforts to avoid high-cholesterol foods. In other respects, attitudes towards food remain more or less constant, though the trend towards eating out continues and more New Zealanders see this as a regular part of their lifestyle than ever before. Our last survey was conducted at a time when there was much public debate about genetic modification and results then indicated concern about eating foods with GM content. While there are some substantial differences in opinions regarding GM within New Zealand, consumers appear to be less concerned about making an effort to avoid foods with genetically modified components.

4.0 LIFESTYLE SEGMENT CHANGES 2000-2005

In 2000/01, seven major lifestyle segments were identified.

Success-Driven Extroverts (13.2%) were characterised as ambitious and self-oriented, in favour of many of the changes that had been made at a political level. They valued free enterprise, and sought an exciting, urban lifestyle.

Educated Liberals (10.3%) had similar levels of high education and income to the *Success-Driven Extroverts* and also enjoyed variety and diversity in their lives. However, they were notable for their social concern. Progressive and egalitarian, this group was clearly happier in 2000 with the change in government and policies than they were in the previous survey in 1995.

Pragmatic Strugglers (11.8%) were characterised by low income groups, often one parent families, with conservative political attitudes and a feeling of getting a raw deal. They were clearly more pessimistic than in 1995 when there was evidence of a determination to survive and take possible steps to improve their lifestyle.

Social Strivers (13.1%) were a conformist group, very outer directed in both their attitudes and consumption behaviour. Not well resourced, they felt life was a struggle and that they were getting a raw deal.

Accepting Mid-Lifers (19.4%) were the least opinionated and the least active of all segments identified. They appeared relatively content with their life, and accepting of the status quo. Preferring to observe life, rather than partaking, summed up this group.

Young Pleasure Seekers (13.5%) were first identified as a lifestyle cluster in the 2000/01 survey but their emergence was in line with social trends evident world-wide. They were young and primarily living for today, with little opinion on social and political issues, and an emphasis on hedonic consumption.

Traditional Values (18.8%) were the most conservative of the segments identified, demonstrating strong beliefs in marriage and the family unit. Generally an older segment, they were careful how they spent their money and indicated the importance of religion in their lives.

Several of the above groups are still clearly recognisable in the seven segments to result from the 2005 survey but there are some significant changes to the composition and nature of the segments. *Educated Liberals*, *Social Strivers* and the *Traditional Values* groups remain largely similar but the major change is the disappearance of the *Accepting Mid-Lifers* as a defined group and the re-emergence of the *Conservative Quiet Lifers* as a segment. There could be several reasons for this change. We noted in our last report that the *Accepting Mid-Lifers* were a difficult group to profile, with no strong views on most political and social issues and also without strong defining personality traits. Demographically, they were an older working group who seemed to represent a contented middle ground with a largely passive lifestyle and strong interests in sport. In our earlier discussion of overall trends, we noted the increased conservatism and shift to traditional values. If the *Accepting Mid-Lifers* have developed some of these opinions, especially as they age and move towards retirement, then it would be logical to expect this group to fragment and merge with other segments. We see evidence of this with the *Traditional Values* group, who demonstrate an increased interest in sport compared to 2000. Also, the *Conservative Quiet Lifers* group are home-based and largely contented, much like the *Accepting Mid-Lifers* from the two previous studies. Younger members of the *Accepting Mid-Lifers* may have been joined with either the *Pragmatic Strugglers*, or, more likely, with the *Young Pleasure Seekers* from the last survey. While the main characteristics of these two groups from 2000 are clearly identifiable in two segments from this survey, there are changes in the demographic composition of both groups and a slightly different tenor to their overall lifestyle profile. In particular, the *Pleasure Seekers* are older than last time with more males evident, and not quite so extreme in their materialistic disregard for issues.

The *Success-Driven Extroverts*, then, are still in evidence and the size of the segment has increased since 2000. While they are clearly the same urban-based, high income, innovative and status conscious segment, there are some changes to the composition. The new members of this segment are younger and female. Potentially this could reflect the success that women have enjoyed in tertiary education in the last decade or so. More females have graduated with high levels of achievement and one would now expect a changing profile for this segment as these career orientated women establish themselves in life.

The *Educated Liberals* appear to be the least changed of all the groups. The proportion in the sample is almost the same and, with the shift in values to more conservative ideals, the *Educated Liberals* appear to be the only genuinely ‘left wing’ inclined group.

The *Pragmatic Strugglers* are still present. As in the last survey, this group are still concerned about getting a raw deal in life and they clearly find money a difficult issue. In fact, consistent with a prospering economy during the last five years, the *Strugglers* are probably better off in terms of employment and income than they were in 2000, but this does not seem to be reflected in a happier view of life.

Traditional Values are now one of three older groups identified in this current study. They are prosperous and very satisfied with life, with high levels of product ownership. As mentioned, we believe they contain some of the ‘better off’ *Accepting Mid-Lifers*, while some of the less active *Traditional Values* people may have moved back to the *Conservative Quiet Lifers* segment.

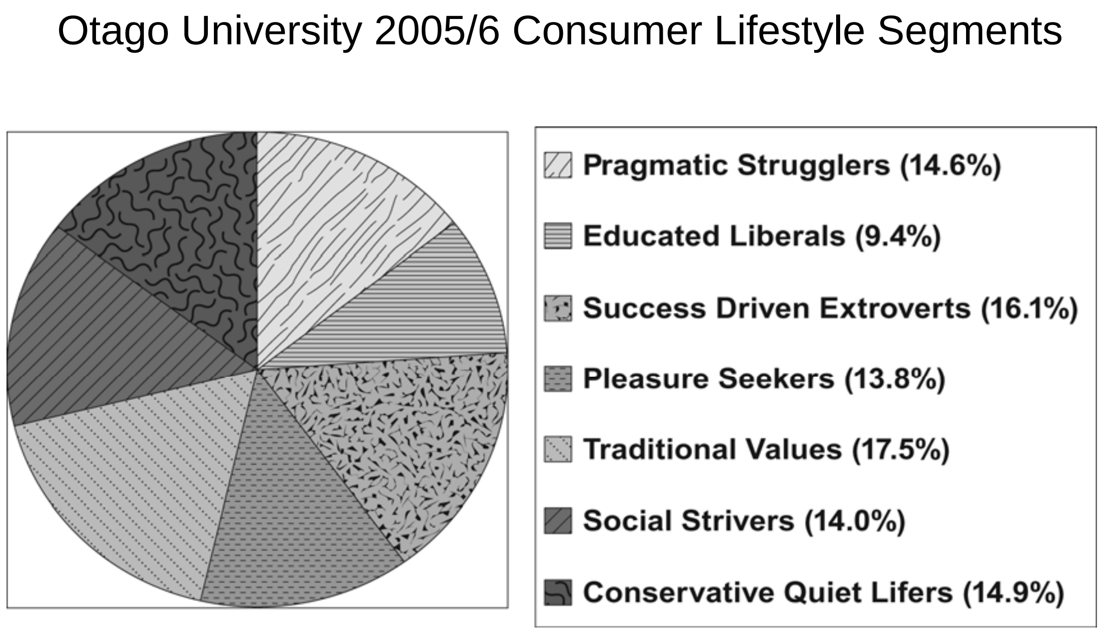
Social Strivers are still evident and they still demonstrate the same conflicts between what they want and what they can attain, and between attitudes and actual behaviours.

As noted above, the *Pleasure-Seekers* are a continuation of the segment first identified in 2000 and then labelled the *Young Pleasure Seekers* as they identified with all the characteristics of Generation X. In this study, the age range is wider but they still display the lack of concern for social and political issues and a very short term focus. They live to enjoy today with few commitments and little regard to the future.

The final segment to emerge from this survey is the *Conservative Quiet Lifers*. This seems to be very much the same older, home-based group that was identified in both the 1989 and 1995 lifestyle groupings. Their re-emergence is not surprising in an ageing population with longer life expectancy.

In conclusion then, the seven groups identified in this current study continue to reflect trends such as the ageing population and the substantial divides in wealth that have grown between the most and least prosperous members of society.

Figure 1:



5.0 LIFESTYLE SEGMENT PROFILES

THE LIFESTYLE SEGMENTS	MAIN CHARACTERISTICS
Pragmatic Strugglers – 14.6%	Politically conservative Negative outlook
Educated Liberals – 9.4%	Progressive and egalitarian Enjoy variety and diversity
Success Driven Extroverts – 16.1%	Value free enterprise Actively ambitious
Pleasure Seekers – 13.8%	Materialistic and unconcerned Live for today
Traditional Values – 17.5%	Family and community orientated Conservative
Social Strivers – 14.0%	Outer directed Conformist
Conservative Quiet Lifers – 14.9%	Home centred Traditional views

5.1 PRAGMATIC STRUGGLERS (14.6%)

This group appear the least satisfied and most pessimistic of all the lifestyle segments. They are more likely to feel that they get a raw deal from life and that others will take advantage of them if they do not watch out. In this regard, they admit that they will try to get even with, or take advantage of, others and that they can get jealous or resentful when they do not get their own way. They feel that life overseas is better than in New Zealand, while at the same time indicating that they believe there are too many foreigners in New Zealand and that racial problems are getting worse. Additionally, New Zealand is seen as becoming more dangerous, school subjects are useless and education is not important. They are also the group that most believes that smacking is an appropriate form of punishment for children.

Values that the *Pragmatic Strugglers* see as important are social power, pleasure and ambition, while they are not concerned with spirituality, helpfulness or the environment. They admit to doubting their own abilities and state that they enjoy novelty in life. This is consistent with a stated attraction towards high-tech gadgets. There is a belief, perhaps arising from their relatively poor economic position, that money can buy happiness. Whilst incomes in this group are not the lowest, more of this segment have children at home and appear to have heavy financial commitments. They admit that they do not find it easy to deal with money and the *Pragmatic Strugglers* are more likely to be operating hire purchase accounts and have loans other than mortgages. Bills are often left until they have to be paid. With this background, it is perhaps not surprising that they are the most assertive of all the segments in believing that New Zealanders pay too much tax.

Their stressed financial situation may mean that they are only able to afford lower quality products. There are certainly critical of product quality and the speed at which items wear out. The products owned by this group are largely orientated towards home entertainment – multiple and digital televisions, game consoles such as PlayStation and X-Box. Trampolines and woodburners are also more commonly owned by the *Pragmatic Strugglers*. Ownership of vans and utility vehicles, including those with diesel powered motors, is also more common among members of this lifestyle group.

Food choices mainly reflect convenience. Prepared foods and fast foods are more common choices than among other segments, as are chocolate bars, potato chips, fizzy drinks and beer. They agree with the suggestion that a drink is a good way to unwind at the end of the day and indicate that taste is more important in their food choices than nutrition. *Pragmatic Strugglers* also recognise that ‘nibbling’ has taken over from eating set meals and they seem unconcerned about this. They are the least likely of all groups to consider ‘healthy’ choices, choose organic food or shop for local produce.

While fast food is regularly consumed by the *Pragmatic Strugglers,* they do not tend to dine out as a family. They are also the least likely group to undertake many activities, especially those concerned with literature, art and culture. As indicated by their product ownership, pastimes are dominated by watching TV (up to six hours a day) and playing computer games. They are also more likely to smoke. This group do like to gamble, including buying lotto tickets and betting on horses. They are also interested in competitions and participate irrespective of the media – mail, online or text.

TV watching is orientated towards channels Two and Three, Sky 1, Sky movies and Sky sport. While books and reading are generally not part of the *Pragmatic Strugglers'* lifestyle, the *Sunday News* and some magazines do feature in their consumption patterns, particularly *Woman's Day*, *Cosmopolitan* and *New Zealand Performance Car*.

The demographic characteristics of this segment indicate that they are overwhelmingly male and predominantly in the 20-40 age range. Many are not married, though they may be living with partners. While full-time work is the most common employment status for this group, most of the unemployed respondents to the survey are also in this cluster.

5.2 EDUCATED LIBERALS (9.4%)

The *Educated Liberals* are a group characterised by progressive attitudes that endorse change, including changing the flag and becoming a republic. They are pro-New Zealand in their beliefs about the opportunities and potential within the country and they endorse the role of the Government in influencing change. *Educated liberals* strongly support education and the value of school subjects, particularly the arts. They are less likely than average to believe that moral standards are declining, that the young have too many privileges or that tougher actions on lawbreakers are required. These liberal tendencies are reinforced with a set of beliefs concerning equality and mechanisms for addressing it. Not surprisingly, this group is the one most likely to believe that women are discriminated against, that Maori have fewer advantages and that trade unions need stronger roles. They also display the most concern for the environment and its protection. Consistent with such views, they express more support than any other segment for greater public spending on social welfare, the arts and the environment, with less support for sport funding.

As well as equality, social justice and the environment, other values that are important to this group are creativity, love and inner harmony. They are not concerned with security, tradition, social recognition, public image or devoutness. Obedience and authority are not important to the *Educated Liberals* and, consistent with this, they have definite views about the inappropriateness of smacking as a punishment for children. In regard to their own quality of life, the *Educated Liberals* are contented and describe themselves as able to relax. Work is interesting and they do not believe that money is needed to achieve happiness.

Educated Liberals are not keen shoppers, being one of the two groups least likely to enjoy shopping and they are especially critical of advertising. Advertising is not important to them and they would like to see it reduced. They describe themselves as likely to throw away circulars and not to notice sponsors' identities, and one third of this segment have junk mail stickers on their letterboxes. They are not cautious about trying new products but will not acquire items simply to make life easier. An exception to this seems to be products and services that are designed to help make payments easier. They clearly like using direct debits and credit cards, but the latter are used for convenience rather than access to credit. Product quality and personal service are both important to this segment.

Previous iterations of this study showed this segment to be early adopters of specific technologies such as personal computers and the Internet. No such products stand out particularly in this survey. Things that they are more likely to own include original paintings, musical instruments and slat beds or futons, while items such as a second television or electric fry pans are clearly not considered essential by the *Educated Liberals*, with ownership of these items very low. Food choices are dominated by the healthy and natural. They prefer fresh produce and are more likely to indicate a willingness to pay a premium for organic food, as well as make an effort to buy local produce. They are opposed to genetic modification in food. Consumption of muesli, brown bread, fresh fruit, continental style cheeses, coffee and wine is high, while roasts, cooked breakfasts, BBQs, fizzy drinks and chewing gum are all shunned. Neither desserts nor nibbling between meals are in the *Educated Liberals'* lifestyle, though eating out definitely is.

Activities concerning health, the arts and socialising with friends dominate the pastimes of the *Educated Liberals*. They are likely to exercise for fitness, including using gyms and going tramping. They are also the most likely group to commute by bicycle, which could be related to both exercise and environmental concerns. Attending arts events, theatres, art galleries and museums are popular pastimes with this segment, and they may do arts and crafts themselves and play musical instruments. While they clearly listen to a range of music, most classical music listeners are in this lifestyle group. Reading is clearly an important pastime. Members of this segment are the most likely to buy books and are the most frequent users of libraries. Socially, the *Educated Liberals* are likely to have visitors to stay or arrange dinner parties and they also seem to make more effort to keep in touch with friends by conventional means such as writing letters and sending cards. They are also heavy email and internet users but they do not respond to advertising in these media and do not tend to buy and sell on the internet. Overall media consumption is not high. This group has the lowest TV watching rates of any segment and radio listening tends towards *Concert FM*, *National Radio* and *Student Radio*. In our last survey, this group showed a tendency towards some of the more expensive 'glossy' magazines consistent with a financially well-off female demographic. This tendency is not so evident this time, although magazines such as *The Listener* and *Time* are heavily read by the *Educated Liberals.*

Seventy per cent of the *Educated Liberals* are female and they fall mainly within the 35-60 year age range. Most seem established in terms of career and family, and they enjoy the second highest average household income of all those surveyed. *Educated Liberals* have the highest levels of educational attainment and the highest socioeconomic grading by occupations (using the Australian Standard Classification of Occupations). Higher proportions of this group reside in Wellington and Dunedin. Perhaps because of the more developed public transport system in Wellington, they are also more likely to use public transport than other groups but, in general, they are also more likely to walk or cycle to work rather than use their own car.

5.3 SUCCESS DRIVEN EXTROVERTS (16.1%)

While this group has traditionally comprised large numbers of younger males concerned with status, there are now more females evident in this group. They are still distinguished though by their personal attitudes and values, as opposed to opinions on social and political matters. Specifically, *Success Driven Extroverts* see themselves as leaders and are career minded people who find their work interesting. They like new and different jobs and enjoy novelty. Describing themselves as outgoing, they strive for better things and pay attention to their appearance. Their values are concerned with pleasure, having an exciting life, self respect, meaning in life, ambition and intelligence. Consequently, they appear as an active segment, leading busy social and work lives.

As consumers, the *Success Driven Extroverts* enjoy shopping and like advertising, including 'junk mail'. Of all the segments, *Success Driven Extroverts* are the most likely to claim to recognise advertising and sponsors in any media, from buses to online or text, and are more likely to purchase as a result of seeing an advertisement. Personal service is still important to *Success Driven Extroverts*, as is acquiring 'nice things' that reflect their personality. Preferred purchasing methods are those that are modern and convenient. They are the one segment who like to receive accounts by email and they also like direct debits, telebanking and internet banking. Credit and charge cards such as AMEX and Diners are also highly used by this group. This segment is also most likely to buy and sell on-line and also use mail order.

Product ownership is technology orientated. They have higher ownership of digital cameras, MP3 players, laptops with accompanying accessories, broadband and multi-media entertainment systems, as well as the latest options with mobile phones such as video. Other items more commonly owned include food processors, electric woks, electric toothbrushes, futons or slat beds and mountain bikes. Also, although only nine respondents in our survey of 3500 owned hybrid cars, it is worth noting that seven were classified into this group. Since concern for the environment is not emphasised by this group, it would appear that the likely attraction for this group is the novelty aspect. Members of this segment clearly enjoy food and both dine out and hold dinner parties. They consider themselves to be good cooks and emphasise fresh and low fat foods in their choices - fresh fruit, fresh pasta, muesli, yoghurt are all consumed frequently, as are coffee and wine. Despite expressing concern about controlling sugar and fat intake to avoid weight gain, the *Success Driven Extroverts* do snack – they are among the higher consumers of choc-bars, salted nuts and chewing gum. Convenience also seems to be an issue in food choice. Pre-prepared sauces are used and many of the items noted above need little preparation and are quick to cook.

Apart from dining out and holding dinner parties, the *Success Driven Extroverts* are active in attending arts events, using libraries and reading and taking exercise. Exercise includes jogging and gym memberships, as well as high ownership of mountain bikes. The *Success Driven Extroverts* are prepared to pay others to do household chores to free time for the things they are interested in. They like to enter competitions and they are heavy users of email and text for communications at both home and work. Friends are important to this segment and they claim to buy more birthday presents for others than do those in other segments. Holidays for shopping and 'living it up' are also a feature of this group's lifestyle.

As an active busy group, the *Success Driven Extroverts* do not watch much television, especially at the weekend. When watched, the most likely channels are *Sky One*, *Sky Movies*, *TV2* and *Channel 4*. However, magazine readership is high and includes *New Zealand Woman's Day*, *New Zealand Woman's Weekly*, *Cuisine*, *Dish*, *Cosmopolitan*, *Metro*, *Life and Leisure*, *Canvas* and *View*. Newspapers include the *National Business Review* and the *Herald on Sunday*. Radio listening includes *The Edge*, *Student Radio* and *MaiFM*.

As noted earlier, this is a relatively young group, with many under 35, and concentrated in professional jobs in Auckland, Wellington and Christchurch. They have the second highest levels of educational attainment and the highest average household income of all the segments. Many are single or living with partners.

5.4 PLEASURE SEEKERS (13.8%)

Pleasure Seekers are a materialistic group who live for the moment. They like life in a big city and they embrace change. They are not concerned about most political or social issues but, consistent with their contemporary outlook, they are the one segment that says that New Zealand should definitely not stop research into genetic modification. *Pleasure Seekers* would also like to see a change in the flag but generally their value systems do not appear to be well developed and they are especially unconcerned with ideas like spirituality, politeness, tradition, social justice, the environment, obedience and helpfulness. This group are confident about work and describe themselves as definitely *not* homebodies. Evenings out are an important part of their lifestyle.

With regard to the market place, again they appear unconcerned. Prices are not of particular importance and neither is service or the selection of the store. Also, they do not emphasise quality in their purchasing but they do express the opinion that New Zealand products are not high quality. *Pleasure Seekers* like advertising and do not agree that it should be restricted to children or that there is too much sex used in advertising to sell products. Overall, they describe themselves as being incautious shoppers who like to try new products. They are not careful with money and they appear to be unwilling to save. Not surprisingly, frugality is not a characteristic of this segment, members of which express a strong liking for credit cards and are also likely to have a range of loans.

Despite their free attitudes towards purchasing and their interest in new products, the *Pleasure Seekers* do not seem to own an extensive array of products. MP3 players are one exception where ownership is high and consistent with the profile described above. Food habits are dominated by convenience and rather less by health or nutrition. They do not plan meals and often eat out or consume fast food. They are unconcerned about issues such as avoiding high cholesterol foods or the prospect of genetically modified foods. Choc-bars, fizzy drinks and BBQs are a regular part of their diets. Apart from dining out, this group attend arts events and the theatre and play some sports like squash and tennis. Media habits are very close to the average in all respects, including TV watching and radio consumption. Among magazines, only *Cosmopolitan* shows above average readership.

The age characteristics of this group appear somewhat wider than in 2000, with members of the group ranging up to the mid-40s. They also report higher incomes than in the previous study but, consistent with last time, the segment does include a significant proportion of students and high numbers of people using rental accommodation. Additionally the *Pleasure Seekers* indicate the shortest period living in their current town. They appear to be the most mobile segment, with less community attachment than any other group.

5.5 TRADITIONAL VALUES (17.5%)

The *Traditional Values* are a well established and stable segment within the repeated lifestyle surveys. They represent an older, generally affluent group within New Zealand who hold more conservative values but are very positive about life in New Zealand. They express the highest levels of satisfaction with their quality of life of all the lifestyle segments.

Traditional Values people are concerned with social order and obedience and believe morals are declining, that we should be tougher on lawbreakers, and more spending is required on police and less on social welfare. However, generally they believe in reduced government involvement and trust the private sector to progress issues. They view themselves as conservative but believe in their own abilities and take care to plan ahead in their life. This belief in the ability of the individual to attain things for themselves is reflected in other opinions, including the belief that trade unions are irrelevant and that women are not discriminated against. *Traditional Values* people view themselves as being in control and life largely being what we make it. They are not overly concerned with pleasure, short term gratification or values such as unity with nature or a world of beauty, but they think that churchgoers are better citizens.

Attitudes towards the marketplace indicate a concern with product quality, although they are generally satisfied with this. They are not inclined to shop for specials and are not motivated by interest-free deals. They also dislike circulars and junk mail and are more likely than any other segment (except the *Educated Liberals*) to have junk mail stickers on their letterboxes. *Traditional Values* people describe themselves as not taking risks on new products, yet they are the most acquisitive of all the segments. While they may not be the leaders in the market place, the range of products owned shows that they are early adopters of most consumer technologies. For example, ownership of plasma TVs and personal computers, with all the extras such as scanners and broadband connections, is highest in this segment. They also invest heavily in household-related consumer electronics and improvements – dishwashers, breadmakers, juice extractors, rangehoods, waste disposal units, heat pumps, spa baths, clothes driers and en-suites are typical of products owned by the *Traditional Values* segment. Vans, utilities and 4 wheel drives, often diesel powered, are also typical choices of this segment. This group are also heavy adopters of financial products and services. They have a much greater range of insurance than any other segment, including income protection insurance, which may reflect the larger proportion of self employed who are in this group. Finances are managed carefully, with more family trusts, and few loans of any types except for mortgages on the main property. The segment has high numbers of credit and charge cards but, in line with their conservative outlook, they still display a preference for cheques as opposed to newer forms of financial transactions such as telebanking.

Food choices are also traditional, with more roast meals and home baking and low consumption of fast food options – especially as lunch time fare. While not displaying any particular interest in so-called healthy food options, it should be noted that this segment has the lowest proportion of smokers.

Many activities of the *Traditional Values* group are based around the home and local community, especially the church. DIY and gardening, though the latter does not extend to growing their own vegetables, are both popular with this segment, while sport is also important to them. Typical activities in this regard include fishing, sailing, golf and bowls. As well as participating in sport, this group also chooses to watch it either live or on television, and listen to it on radio. The arts, books and music are not important to this group, though when they do listen to music, it is more likely to be either classical or country/folk. While more of this group have access to technologies such as broadband, this does not seem to translate into heavier usage of email and the internet and, in line with their more risk averse approach to life, they do not show any inclination to buy and sell online. Similarly, while mobile phone ownership is as high as any other segment, the *Traditional Values* have not yet taken to texting as a method of communication.

While this segment does not buy books or use libraries, they do have a heavy readership of magazines including *Time*, *NBR*, *Independent*, *Cuisine*, *North and South* and *Readers' Digest*. Morning daily papers and the *Sunday Star Times* are also widely read by *Traditional Values* people. In line with their interest in sport, both *Sky Sport* and *Radio Sport* feature in their viewing and listening preferences, along with *TV One*, *UKTV*, *CNN* the *History Channel*, *National Geographic*, *Newstalk ZB* and *National Radio*.

The demographics of this group are in line with expectations from some of the interests, opinions and product ownership described above. Most are males over 50 and either in full time work or retired, with above average occupational status employment. As noted earlier, more self employed people also fall into this segment. Typically they are married or widowed without children at home in conventional 'empty nest' stages of life. While the *Traditional Values* segment is dispersed throughout the country, survey respondents from areas such as Central Otago, South Canterbury and Hawkes Bay typically grouped into this lifestyle segment. The *Traditional Values* have also spent longest in their present community, having lived there for an average of ten years.

5.6 SOCIAL STRIVERS (14.0%)

Social Strivers are an opinionated group that holds conservative views. They are concerned about the pace of change in New Zealand and believe that many things are getting worse. For example, many believe moral standards are declining, racial problems are getting worse, more discipline is needed in schools, that we need to be tougher on lawbreakers and that the young have too many privileges. *Social Strivers* are also critical of the amount of foreign investment in New Zealand but at the same time they believe that much of what is good is borrowed from overseas. They are strongly in favour of keeping the current flag and do not support the idea of New Zealand becoming a republic.

As individuals, *Social Strivers* describe themselves as complex people. They are career minded but admit that they need encouragement at work. They feel that there is little they can do to change their life but they like to strive for better things. Although they do not feel in control of their own destiny, they do try to plan ahead. The values that guide this group are concerned with tradition, authority, social order, public image and a spiritual, meaningful life. *Social Strivers* are busy people who like to be with others and find it difficult to find time to relax.

As consumers, *Social Strivers* view themselves as knowledgeable about the market place. They appreciate personal service and enjoy advertising, but are critical of product quality. They prefer to stick to well known brands and believe they are cautious over new products. They display some frugal tendencies and have a tendency to shop for specials. Despite being knowledgeable about the market place, *Social Strivers* do not find it easy to deal with money and worry about paying bills, which they indicate are dealt with straight away if possible. They are also concerned about issues such as credit ratings and internet security. Some of these concerns may be the result of the lower income available to this group but this segment also has fewer mortgages and other loans than average, and their financial position alone does not explain their cautious attitude towards dealing with the market place.

Product ownership amongst the *Social Strivers* displays the same kind of contradictions as manifest in their attitudes. While the members of the segment do not display the usual characteristics of early adopters and they have lower ownership of most household items than other groups, they do have more DVD recorders and more plasma televisions than one would possibly expect. Other higher ownership products, such as rice cookers and deep fryers, are potentially reflective of the ethnic make up of this segment which includes larger numbers of Māori and Pacific Islanders. Food consumption also displays similar contrasts between attitudes and behaviours. *Social Strivers* describe themselves as concerned with nutritional aspects and claim to check labels for information. They also say they choose low fat foods, yet they are among the more frequent consumers of cooked breakfasts, home baking and ice cream. *Social Strivers* think themselves to be good cooks and do not dine out as frequently as most other segments.

Activities are mainly based around the home and local community. Members of this group do not pay others to do household chores for them, and regular church attendance and undertaking volunteer work are typical of this segment. At home they are likely to play with game consoles such as PlayStation and X-Box and watch television. Average TV watching among this segment is four to six hours a day and, although preferences are spread across stations, watchers of regional and Māori television are more likely to be in this group. Despite adopting technologies such as computer games, the *Social Strivers* have not adopted computer technologies completely. For example, this segment is still more likely to be frequent letter writers, rather than intensive users of email and texting.

Radio Pacific, *Radio Rhema* and *Solid Gold FM* are the most frequently listened to radio stations by the *Social Strivers*, while magazines and newspapers read include the *Australian Woman's Weekly*, *New Zealand Woman's Weekly*, *New Zealand Woman's Day*, the *TV Guide* and *Readers' Digest*. Evening dailies and Sunday newspapers are more commonly read than morning daily newspapers.

Since the 1980s, the *Social Strivers* have matured into one of the older lifestyle groups in this research. While they are spread across all ages, there are more in the over 60's age range and, consequently, a higher proportion of widowed people. Part-time work, unemployed and retired are all more commonly indicated by members in this segment and, in line with this, they have the second lowest levels of household income in the survey after the *Conservative Quiet Lifers*.

5.7 CONSERVATIVE QUIET LIFERS (14.9%)

Conservative Quiet Lifers are an older group (mainly aged over 55) who are characterised by traditional views of politics and society and a cautious approach to life. They tend to believe that moral standards are declining and that we should return to the standards of previous generations. This dislike of change is demonstrated in other views. For example, they believe we should retain the current flag, that New Zealand does not need a larger population, there is too much foreign investment, young people have too many privileges, and that we need to be tougher on those that break the law. This group is also the most suspicious about corruption in business and the benefits of GM research. This cautious view of many current trends and issues is reinforced by the feeling that they have little influence on things in New Zealand or their own position.

As people, *Conservative Quiet Lifers* describe themselves as homebodies. As they are older, many are separated or widowed. They claim to be happy on their own and do not pay others to do jobs around the home for them. They claim not to be leaders and nor do they seek authority or variety in life. This segment contains a more than average number of churchgoers and being devout is more important to this group than to others. They do not see money as a route to happiness.

In line with their general view of life, the *Conservative Quiet Lifers* display somewhat cautionary and negative attitudes towards the market place. They are critical of product quality and more likely to believe that performance is declining. Products are considered overpriced and they are critical of the quantity, substance and accuracy of advertising. As consumers, they describe themselves as cautious people who check prices and will delay purchases to save money. They dislike credit cards and telebanking and appear concerned about security issues with newer electronic methods of payments and business. They try to look after their possessions and do not look to buy gadgets and novelty products or ‘nice’ things.

In line with these attitudes, *Conservative Quiet Lifers* are later adopters of most products. They own fewer home appliances like dishwashers, or newer consumer electronics such as personal computers, digital cameras or MP3 players. Mobile phones are pre-paid and woodburners are the only household product in this survey which this group owns more of than the average.

The activities of this segment are based around the home or local community, including the church. They spend time in the garden, including growing their own vegetables, and they are also more likely to make some of their own clothes and do arts and crafts. Lawn bowls is the sport most likely to be participated in. *Conservative Quiet Lifers* are also more likely to smoke than most segments. Dinner parties and dining out are not part of their daily lives and diet seems fairly traditional but without extremes. They are not likely to be high users of pre-prepared items such as sauces. TV watching is also an important part of the daily lives of the *Conservative Quiet Lifers,* though it does not seem to be dominated by any particular channels. The *TV Guide* is read by most, but consumption of other magazines is very low and the group are not great readers of books, magazines or daily newspapers. Radio listening is also below average but more likely to be of stations such as *Radio Rhema* or *Solid Gold FM.*

As one would expect with an older group, this segment contains a larger proportion of single person households with more widowed and divorced people. 71% of the segment are female and cats are commonly kept as a domestic pet. Nearly all the group are either retired, full-time homemakers or in part-time work. Education and income levels are the lowest of all segments. Many of this segment live in smaller provincial towns such as New Plymouth, Wanganui, Blenheim and Oamaru.

Related Publications:

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

Todd, S., Lawson, R. and Jamieson, T. (2000) New Zealand Beyond 2000 – A Consumer Lifestyles Study. Dunedin - Department of Marketing, University of Otago.

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