[redacted]

06 May 2022

Kia ora [redacted]

Thank you for your email of 28 March 2022 requesting information about the Gen Less 'Right Side of History' campaigns monitoring and metrics, costs and benefits. Answers to your specific questions are detailed below.:

- ***All Right Side of History campaign monitoring and metrics, in particular, those that focused on New Zealanders' engagement and comprehension of matters raised, and whether the campaign prompted people to act***

Attached in **Appendix One** is the Right Side of History Campaign's Impact Measurement Framework, which outlines the core metrics for assessing the campaign's impact and value for money.

The first 'delivery' column relates specifically to the campaign's delivery and reach, while the second 'comprehension' column assesses whether people are recalling the campaign, including the takeaway messages and actions New Zealanders are taking as a result of seeing it. These actions include whether the campaign prompted further discussion about Gen Less and/or climate change, or whether the respondent took an action to reduce their climate impact.

EECA monitors the performance of Gen Less, including its performance against the campaigns impact measurement framework, through ongoing market research. This data is collected through EECA's two research monitors:

1. The consumer monitor, which samples 750 New Zealanders each quarter. The latest insights from this monitor can be found on the EECA website: https://www.eeca.govt.nz/assets/EECA-Resources/Research-papers-guides/eeca-consumer-monitor-research_Q1-2122.pdf

2. The business monitor, which surveys a representative selection of New Zealand businesses, sampling between 500 and 600 business decision-makers every six months. The latest insights from this monitor can be found here: https://www.eeca.govt.nz/assets/EECA-Resources/Research-papers-guides/EECA-Business-Monitor-Nov-2021.pdf

- ***What potential actions was it thought the Right Side of History campaign would cause people to take, and***

The overall aim of the 'Right side of History' campaign is to challenge New Zealanders to raise themselves out of complacency when it comes to climate change. As such, the campaign is not only measuring whether the campaign prompted individuals to take steps to reduce their climate impact, but also whether it has had an impact on New Zealander's attitudes and opinions towards climate change. In particular, our monitoring focuses on whether the campaign is encouraging New Zealander's to believe that their actions can make a difference in reducing energy-related emissions, as this increases likelihood of action. As detailed in the Impact Measurement Framework, EECA is measuring campaign effectiveness through:

- Campaign recall – have people seen it?
- Message outtakes – is it conveying the relevant message?
- Likeability
- Specific actions taken as a result
- New Zealander's willingness to participate in change
- New Zealander's level of comfort with institution-led change.

- ***Reports on the costs and benefits of the Right Side of History Campaign.***

I have attached two documents relevant to this request:

1. An EECA briefing which outlines the rationale for the Gen Less 'Right side of History' and previous Gen Less campaigns, is attached in **Appendix Two** (with the associated attachments in **Appendix Three**, **Four** and **Five**)

2. The Interim Campaign results from December 2021, which assessed the campaign's performance in its first two months in the market, providing an initial indication of its costs and benefits. This is attached in **Appendix Six**.

The 'Right Side of History' campaign is running until October 2022. EECA will undertake a comprehensive evaluation of Gen Less since its inception in 2019 to assess the campaign performance in its entirety. This will include in-depth insights into the costs and benefits of the campaign, including the overall impact it has had on encouraging energy-related emissions reduction behaviours. EECA will report on these findings by the end of the 2022.

You have the right, by way of complaint to the Ombudsman, to seek an investigation and review of my response to your information request. You can do this by email to info@ombudsman.parliament.nz or by writing to the Office of the Ombudsman, PO Box 10152, Wellington 6143.

Yours sincerely

Andrew Caseley
Chief Executive
Energy Efficiency and Conservation Authority (EECA)

Appendix One: Gen Less 3.0 ‘Right side of History’ Impact Measurement Framework

GEN LESS

Measurement Framework: Right Side of History Targets FY21/22

DELIVERY
Are the messages reaching and engaging people?

COMPREHENSION
What did people think, believe, intend, feel?

LONG TERM BEHAVIOUR CHANGE
What is the organisational critical outcome?

SPE Measures: Fostering a society in which sustainable energy is expected and demanded

- At least 16% of individuals and 16% businesses are aware of the Gen Less brand.

SPE: *(Broader Gen Less programme)*
- At least 32% of individuals understand that transport is the biggest contributor to New Zealand's energy-related emissions
- At least 46% of individuals say they are likely to consider a low-emissions vehicle as their next car purchase.
- At least 37% of businesses are actively seeking to reduce the impact of their energy use and transport choices

Non-SPE:
- At least 73% of New Zealanders think climate change is an important issue for New Zealand
- At least 72% of people agree we need to make changes to our energy use to address climate change, even if it means a change to our current lifestyle

3.0 Campaign-Specific Measures

TV (Buying audience 25-54 yrs)
- **Total Campaign (17 Oct – 30 Jun):** 2.997m 1+ Reach (aged 18+), avg freq 33
  - Challenge (17 Oct – 30 Jun): 2.776m 1+ Reach (aged 18+), avg freq 22
  - Response (17 Oct – 30 Jun): 2.797m 1+ Reach (aged 18+), avg freq 14

  (NB. Media buying performance will be measured against 25-54 yrs.)

Online
- Video: YouTube completion rate: 45%, CPCV $0.08, CV: 1,500,774
  TVNZ Completion rate: 95%. CPCV $0.06, CV 1,223,933
- Social : CPCV" $0.21, CV: 756,983

OOH (Buying audience 25-54 yrs)
999k 1+ Reach (aged 18+), avg freq 30

Stuff Partnership
9m impressions on ad units, 25K page views on articles
Print r&f against AP 18+: 22.84%, 5.36x avg freq

PR/Media Relations:
PR Target (at launch) = 3-4 pieces of media coverage, Media Impact Score 2.5+
Influencer Target (at launch) = 130,000 reach

Web: (by 30 June 2022) *(Broader Gen Less programme)*
Visits to website (no. of sessions): Target 1m
Hits to campaign page: Target 45,000
New users to website: Target 85%

Social: (by 30 June 2022)
Followers: Target Facebook 15,000, Insta 8,000
Engagements (reactions, comments, shares, clicks, saves) Target 4-6%
Reach: Target by 30 June - Facebook 500k/mth, Insta 150k/mth

eDM: (by 30 June 2022)
eDM sign ups: Target 10,000
Open rate: Target 35%
Click-through rate: Target 5%

Recall of ad - Have you seen/heard any of this advertising recently?
% Yes: Baseline 43% 12MR (peak 46%). Target 43-48% (3MR)

Recognition of Gen Less - Which of the following have you heard of?
% Selected: 36% EECA (Q1, 3MR). Baseline Gen Less = 22% (Q1, 3MR). Target: 25% (Q4, 6MR)

Likeability - How much do you like the advertising?
% I like it a lot/little: Baseline = 46% (GL1.0) & 52% (GL2.0), Target = 46%

Unprompted message outtake
What messages can you remember from the material? What was it telling you?
Open text response: Baseline = N/A, Target = N/A

Prompted message outtake (Baseline = N/A, Target = N/A)
Which of these statements do you agree with after seeing the advertising?
- This ad gave me something to think more deeply about
- This campaign is relevant to me
- We can all make a difference to climate change in our own way
- This ad is for all New Zealanders
- Now is the critical time to make changes for the climate
- In future, people will look back on the actions we took and whether we were on the right side of climate history
- It's no longer enough to just believe in climate change – we all need to take action
- We need to reduce our energy emissions today
- The climate actions I take today will be part of the legacy I leave behind
- Lots of New Zealand people and businesses are already taking action on climate change

Action: As a result of seeing this campaign, I...
- Visited the Gen Less website
- Talked to family and friends about climate change
- Looked for more information about climate change
- Took some action to reduce my climate change impact (please specify)
- Other (please specify)

Baseline = N/A, Target = N/A

NZers' level of comfort with institution-led system change
- The Government needs to do more to help reduce New Zealand's impact on the environment % Strongly agree: Baseline = 28% (12MR), Target = 28%
- Government should provide incentives to encourage behaviours that protect the environment % Strongly agree: Baseline = 33% (12MR), Target = 36%

NZers' willingness to participate in change
- I am prepared to change my own personal behaviour in order to reduce climate change % Strongly agree: Baseline = 22% (12MR), Target = 25%
- We'll have to change how we live because of climate change, but these changes can be positive % Strongly agree: Baseline = 27% (12MR), Target = 29%

Businesses willingness to participate in change
- Our business is taking steps to reduce its greenhouse gas emissions
  % Strongly agree: Baseline = 7% (12MR), Target = 9%
- Businesses can make a difference to climate change
  % Strongly agree: Baseline = 18% (12MR), Target = 23%
- We need to consider all solutions to climate change, even if they mean changing how our business does things
  % Strongly agree: Baseline = 18% (12MR), Target = 21%

Appendix Two: Briefing – Gen Less Intervention Logic and Impact Monitoring

Information withheld under section 9(2)(a)

Ministerial Briefing

EECA TE TARI TIAKI PŪNGAO ENERGY EFFICIENCY & CONSERVATION AUTHORITY

To	**Hon Dr Megan Woods** **MINISTER OF ENERGY AND RESOURCES**		
Title of briefing	**Gen Less Intervention Logic and Impact Monitoring**		
Date	**30/11/2021**		
EECA reference number	EECA 2021 BRF 023	Response required by:	1 December 2021
EECA priority	Routine		
Consultation			
Attachments	Appendix 1: Gen Less Intervention Logic Appendix 2: Gen Less 1.0 February 2020 campaign results Appendix 3: Gen Less 2.0 July 2021 campaign results		

EECA contacts

Position	Name	Mobile Number	Work Number	1st Contact
Chief Executive	Andrew Caseley	[redacted]		✓
Responsible manager	Jesse Corlett	[redacted]		
Principal author	Maggie Tapa	[redacted]		

Purpose

1. The purpose of this briefing is to provide you with an overview of EECA's Gen Less programme, including the programmes rationale and how the programme's impact will be assessed.

Key messages

- A key part of EECA's statutory function is to promote public awareness of the importance of energy efficiency, conservation, and the use of renewable sources of energy.
- EECA research shows that while New Zealanders generally believe in climate change, they struggle to identify the actions they can take to reduce the impact of their energy use.
- The Gen Less programme was established to address this need. While, as previously, EECA continues to provide specific action-focused advice, the Gen Less programme links this with a wider message about energy-related emissions and the need for action across the economy to address them.
- The Gen Less 1.0 and 2.0 campaigns, which spent $1.66 million and $2.66 million respectively, proved successful in engaging New Zealanders on energy related climate change matters and encouraged individuals to change their behaviour.
- The *Gen Less 3.0: Right Side of History* (Gen Less 3.0) campaign launched last month and has a budget of $2.44 million. This is in line with previous budget allocations for Gen Less energy emission reductions campaigns, and the previous year's actual spend.
- The two-part campaign will run for 12 months and is now transitioning into the campaigns second 'response' phase, which will showcase the actions underway by New Zealanders and organisations in order to inspire individuals and businesses to take further action.
- EECA believes this is a modest investment given the scale of the task and its potentially significant impact.
- EECA is currently finalising the campaign impact metrics for Gen Less 3.0 and will provide these to you before the end of the year. These will enable EECA to provide on-going updates to you and the EECA Board on the Gen Less 3.0 campaign's performance.

Information withheld under section 9(2)(a)

Recommended actions

1. **Note** that we will provide you with the final campaign metrics for Gen Less 3.0: Right side of History campaign by the end of 2021
2. **Note** that we will provide regular updates on Gen Less 3.0 performance as the campaign progresses
3. **Agree** to discuss the contents of this briefing with officials on 1 December 2021

Agree / Disagree

[redacted]

Andrew Caseley
CHIEF EXECUTIVE
30 / 11 / 21

[redacted]

Hon Dr Megan Woods
MINISTER OF ENERGY AND RESOURCES
__/__/__

Background

1. A key part of EECA's statutory role is to promote public awareness of the importance of energy efficiency, conservation, and the use of renewable sources of energy. EECA has always run public campaigns to engage and inform the public on these issues.

2. Following the conclusion of EECA's successful Energy Spot campaign, in 2018, EECA shifted its communications approach in response to growing Government priorities and public attention on climate change. While continuing to provide simple household and business energy tips, it also introduced higher-level messaging to link energy use with the climate change challenge. This formed part of EECA's strategy to *'mobilise New Zealanders to be world leaders in clean and clever energy use'.*

Rationale for Gen Less

3. In 2019 EECA commissioned the TRA insights agency to undertake market research to better understand New Zealander's attitudes towards climate change and energy use. The research revealed that:

   a. The vast majority of New Zealander's do not need convincing around climate change science;

   b. The current climate discourse is confusing, overwhelming, and negative which often overwhelms people rather than increasing salience;

   c. Climate change discussions are often future oriented, which implies that actions can be delayed, despite the science asserting the need for urgency;

   d. Most people agree that lifestyle changes will need to occur, but many of these provide co-benefits in health and wellbeing (which can offer more immediate and comprehensible benefits); and

   e. People do not understand the links between energy and climate change well, and do not associate transport with energy.

4. This last insight showed that while people accept climate change is happening, there is a critical need to provide New Zealanders with clear messaging that enables individuals, households, and businesses to reconsider how they consume energy and provide tangible actions they can take to reduce their emissions.

5. The full intervention logic for Gen Less is included in **Appendix One.**

Gen Less programme overview

6. The Gen Less programme was established to engage and inform New Zealanders on how their energy use relates to climate change, using public campaigns to achieve emissions reductions by improving energy use or the source of energy throughout all levels of society more effectively.

7. As detailed in the intervention logic, the key outcomes of Gen Less in the near to medium term are:

    a. New Zealanders are motivated to act, and are empowered the transition can be achieved;

    b. New Zealanders are able to access information on reducing their energy-use, and are willing to participate in change;

    c. New Zealanders see and recognise Gen less and make this link with government action and people are more comfortable with system-level change to reduce emissions.

8. Eight Gen Less campaigns have been launched to date. The most prominent were the *Gen Less 1.0: Live More with Less Energy*, *Gen Less 2.0: Say No to Wasted Energy*, and *Gen Less 3.0: Right Side of History* campaigns. Details on campaign performance and spend are outlined below.

Monitoring and evaluation of Gen Less

9. EECA develops core metrics and success factors for every Gen Less campaign. This helps EECA ensure its campaigns are aligned to the programme's intervention logic, that they represent value-for-money, and that they are successfully contributing to EECA's wider SPE and SOI outcomes.

10. The performance of EECA's campaigns is tracked through on-going market research. This data is collected through EECA's two research monitors, administered by the TRA:

    a. **The consumer monitor,** which samples 250 New Zealanders over 18 every month, and 750 per quarter; and

    b. **The business monitor**, which surveys a representative selection of New Zealand businesses, sampling between 500 and 600 business decision-makers every six months.

11. This research helps EECA gauge whether the campaigns have helped New Zealanders better understand the issues raised, and whether they have prompted action. EECA also

undertakes media analysis to understand how New Zealanders engaged with Gen Less content across platforms.

12. These insights are key to ensuring success of the Gen Less programme, by helping EECA understand how to maximise engagement and return on investment, while ensuring campaigns align with the attitudes of New Zealanders and are designed in a way that best encourages action.

Gen Less programme to date

Gen Less 1.0: Live More with Less Energy

13. *Gen Less 1.0: Live more with less energy* ran from September to November 2019 which focused on building urgency for climate change and helping individuals with actions to reduce individual carbon footprints.

14. This campaign had a total spend of $1.66M and had television, digital, out of home, print, PR, and paid media components.

15. EECA's insights showed that this campaign was well-received and contributed to a growth in public engagement and action on climate change, despite having a short time on the market. TRA insights showed that after seeing Gen Less content:

    a. 46% of New Zealanders and 57% of businesses agreed that using less energy is something they wanted to do;

    b. 23% of New Zealanders stated they began using electricity more efficiently at home; and

    c. 17% of New Zealanders looked for more information on climate change.

16. The full campaign results from TRA are included in **Appendix Two.**

Gen Less 2.0: Say No to Wasted Energy

17. *Gen Less 2.0 Live more with less energy* ran from October 2020 until August 2021. The campaign showed consumers how reducing energy-related emissions can be achieved by letting go of things we don't love (e.g. being stuck in traffic).

18. This campaign had a total spend of $2.66M and had digital, television and radio components. TRA insights showed that after seeing Gen Less content:

    a. The campaign resonated more strongly with New Zealanders compared with Gen Less 1.0, as likeability was at 52% compared with 44% from Gen Less 1.0.

b. 40% of online viewers, and 31% of offline viewers considered things they would stop doing to reduce emissions, which they'd rather not be doing in the first place; and

c. 36% of online viewers, and 14% of offline viewers looked for more information on climate change.

19. EECA's latest TRA insights on Gen Less 2.0 is included in **Appendix Three.**

Gen Less 3.0: Right Side of History

20. The *Gen Less 3.0: Right Side of History* campaign launched in October 2021 and will run until September 2022. This campaign is based on the idea that the current generation has a significant role in reducing the long-term impacts of climate change, and that urgent action across businesses, government, communities and individuals is needed.

21. The budget for this campaign is $2.4 million, which is in line with the 2020/21 budget allocation for Gen Less energy emission reduction campaigns, and what was planned for 2019/20 (which was cut short due to COVID-19).

22. The two-part campaign will run for 12 months, and will include television, digital, out of home, social and paid media components to ensure longevity and to maximise return on investment.

23. The first part 'the challenge' is currently airing and aims to challenge New Zealanders to raise themselves out of complacency when it comes to climate change. We are now transitioning into the campaigns second 'response' phase, which will showcase the work underway by New Zealanders and organisations who are already contributing to climate mitigation. We expect this to have a significant impact in terms of inspiring individuals and businesses to take action and will provide options for them to do so.

24. The investment in Gen Less 3.0 is reflective of the task Gen Less is seeking to address: engaging and encouraging business and consumers to take meaningful energy-related behaviour changes across all aspects of the economy from transport fleets, factories, schools and shop floors all within a few years. This is particularly important given the resurgence of COVID-19 in the latter part of this year, and the pivotal moment we are at in terms of re-engaging New Zealanders on climate change matters.

25. EECA will undertake analysis following the campaigns completion to assess how the campaign performed in its entirety.

Next steps

26. EECA is currently finalising the metrics for Gen Less 3.0, which we will provide to you by the end of 2021. We will then provide you with on-going updates on Gen Less 3.0 campaign performance as the campaign progresses.

27. EECA welcomes the opportunity to discuss this briefing with you at its next meeting with you on 1 December.

Appendix Three: Gen Less Intervention Logic and Impact Monitoring – Intervention Logic

TE TARI TIAKI PŪNGAO EECA

Gen Less general intervention logic - updated version 12 February 2020

Problem Definition
While the majority of people agree on the fact that climate change is an issue, this belief does not translate into substantial system changes required.
Programme aim : The Gen Less programme aims to create a 'fertile ground' for system level change (emissions reduction by improvement of energy use).

Assumptions
- EECA's focus is on energy-related greenhouse gas emissions
- Gen Less aims to be a positive campaign that focuses on activities the public and businesses can take; however, it will also cover the developments in the understanding of the science and challenges of climate change.

Gen Less principles

What define Gen Less? Set of principles:
1. This is not only about information, it's about changing beliefs and behaviours.
2. Inspire people to take action to change their attitude. Not the other way around.
3. Make the transition desirable. Show what is achievable.
4. Now!
5. Connect and elevate: Explain links between Energy, Climate changes and way of life, and elevate to an emotional level (hearts and minds).
6. It needs to have a link with energy.

- Why? Connect + Elevate issue
- How? What is possible?
- What can/should I do?
- Inform (authority source)

What barriers and constraints can be addressed by Gen Less?
- Information
- Decision
- Prioritisation

INPUTS
Resource going into the programme

Resource going into the programme

Breakdown of funding.
To be completed by sub-programme/campaign

Breakdown of resourcing.
To be completed by sub-programme/campaign

Advocacy across businesses
EECA messaging in engagement with businesses, and Gen Less messaging, are consistent.

ACTIVITIES
Events or processes to meet needs

Events or processes to meet needs

Priority/focus setting
EECA select where the Gen Less approach will be applied. It can be a specific public (SMEs) or a focus area (transport).

Research and knowledge
EECA prepares and procures research and evidence to inform our understanding and input on issues relevant to Gen Less.

Communications campaign
Getting out the Gen Less message through advertising / partner advertising / events and sponsorship / PR / earned media / social media

Leveraging cross government actions
GE inform CE about coming government initiatives.

Advocacy across government
EECA messaging in engagement and input to other department's work, and Gen Less messaging, are consistent.

Monitoring and evaluat on surveys/analysis.

OUTPUTS
Units of service delivered to stakeholders

Units of service delivered to stakeholders

Messaging people can relate to, about why it is important to act, now. Connect energy, emissions and behaviour, and elevate the issue (hearts and minds).

Stories that show vision, momentum and progress.

Digestible, practical and targeted information on what is possible, and how the transition can be made.

Gen Less messaging is consistent with work being done across government and is reflected in policies/programmes being developed by other departments/Ministers.

Ongoing monitoring of programme reach as well as regular TRA surveys to understand impact.
Launch review Feb 2020

SHORT-TERM OUTCOMES
Outputs will result in...

Changes in knowledge, awareness, convenience, motivation etc.

The public and businesses are motivated to act

New Zealanders feel empowered and confident that they can achieve the transition

The public and businesses are able to easily access the information they need to take action to reduce energy use and emissions

Where relevant, people are able to link Gen Less messaging with work/consultation being undertaken by government agencies (i.e. people more engaged) => Opportunity to give their views / Access to relevant government offers.

EECA and stakeholders can track the progress and impact of the Gen Less programme (particularly compared to the original TRA survey).

People recognise and connect with Gen Less

MED-TERM OUTCOMES
If short-term outcomes are achieved then...

Changes in behaviour, actions, practices, decisions or policies

Create a fertile ground for system level change

Behaviours and priorities shift starts to happen

New Zealanders are more willing to participate in change

More businesses are willing to participate or are actively participating in change

More people are comfortable with institution-led system change

Gen Less brand value is recognised and various stakeholders put resources in spreading the Gen Less messaging.

LONG-TERM OUTCOMES
The ultimate goal

Environmental, social, or economic changes (benefits)

People accept essential changes to the way they live and demand change to a low emission economy and society/ sustainable energy system that supports prosperity of current and future generations

Organisations make a priority of the energy transition, and invest in changes to their operations.

Policies and regulation are implemented, with the level of ambitions required to achieve the targets, on time.

Gen Less become not solely dependent from EECA's financial support.

SYSTEM OUTCOMES
What we are contributing to

- Business emissions are reducing
- Residential emissions are reducing
- Transport emissions are reducing

Businesses provide products and services needed to facilitate the transition to a low emission economy and society.

Appendix Four: Gen Less Intervention Logic and Impact Monitoring – 1.0 Results

FEBRUARY 2020

Insights Deep Dive

From the consumer and business monitors

EECA

TRA

Agenda

1. **The Cultural Context**
2. **Gen Less**
3. **What else is happening**
4. **Bringing it all together**

The Cultural Context

TRA

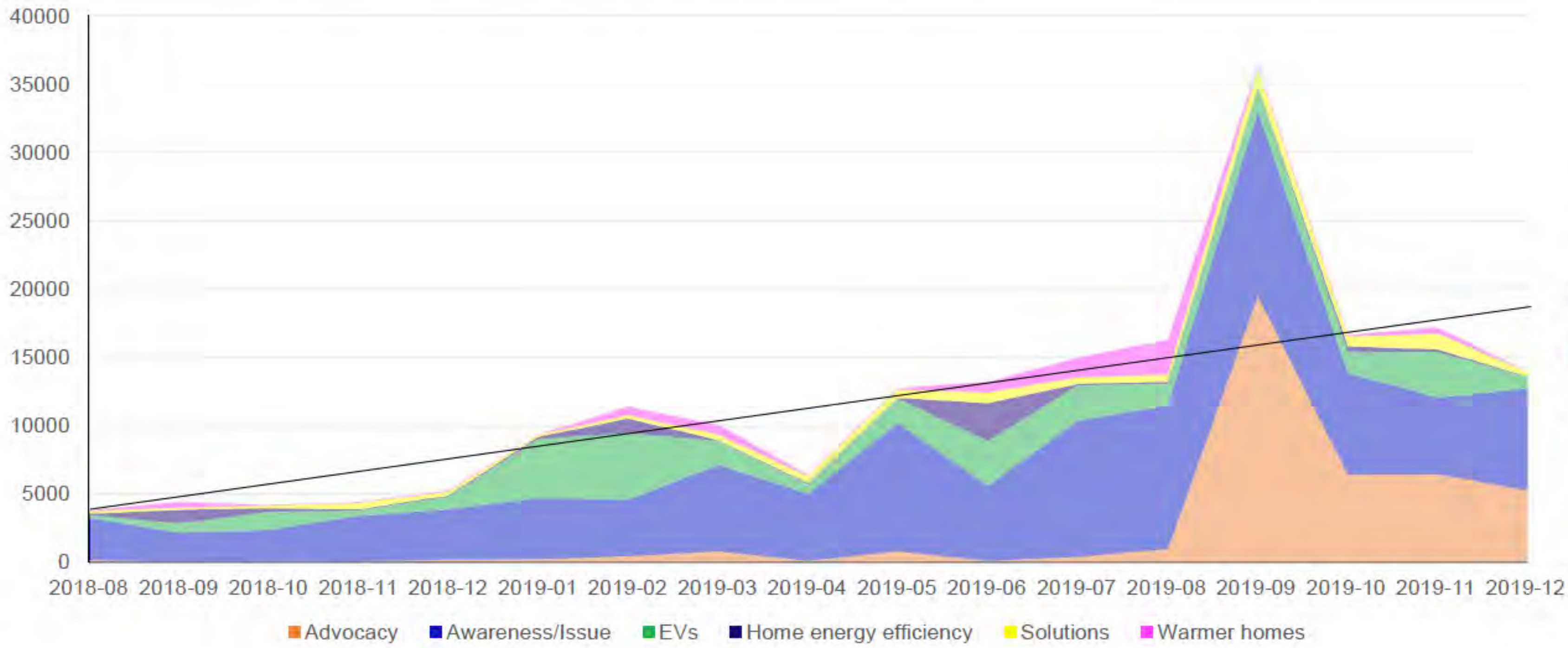
Hearts and Minds

There's a changing environment around climate change into which Gen Less has been launched

Cultural Overlay

Cultural Overlay

Tracking the number of media stories and social media conversations happening on climate change related topics.



Steady growth in the conversations people are having, especially around Advocacy.

Source: EECA Cultural Overlay.

TRA

The recent spike in advocacy has centred around Greta Thunberg

Cultural Overlay

There has been significant amount of discussion, with reactions mixed.

September 2019

'Be a good girl, shut up' - Top Gear's Jeremy Clarkson unleashes on Greta Thunberg
(likes:11141 comments:2518 shares:1354)

Mike Hosking: Hyperbole and hot air - Greta Thunberg will grow into a Jacinda Ardern
(likes:2504 comments:1328 shares:171)

Opinion: Why white, middle-aged men are so angry with Greta Thunberg
(likes:1225 comments:492 shares:99)

Teenage climate change activist Greta Thunberg had one question for the global leaders assembled at the United Nations: "How dare you?"
(likes:7591 comments:1319 shares:791)

“This girl is amazing!! Her first original speech made me rethink about the way we live and how it impacts our planet. Our family has made small changes to reduce our impacts on the environment after listening to Gretas intelligent words.”

“We need more of her, not quiet folk with their heads in the sand or even worse, those who see the train coming yet still say it doesn’t exist. More power to her!”

”Sorry I can not take her seriously shes been brainwashed and is a puppet for a part of society that just stamp there feet and blame everyone.”

Source: EECA Cultural Overlay Engine

TRA

earts and Minds

We are slowly growing our more available segments

Segments - % of New Zealand

	Apr-Jun 19	Jul-Sep 19	Oct-Dec 19
The Willing	18%	19%	21%
The Busy	17%	20%	25%
The Self Interested	23%	21%	18%
The Complacent	22%	23%	20%
The Unconvinced	19%	18%	17%

This can be considered a positive movement, as The Busy segment is the group next most open to change after The Willing.

TRA

And in general people feel that they are taking more sustainable actions

This in turn can build into more actions. Reinforcing collectively what everyone is doing, and that norms are changing will be important.

Actions taken regularly

	Q2' FY20	VS Q4' FY19
Reducing the amount of electricity used in home	72%	+3%
Reducing waste	70%	+3%
Using electricity or wood for heating instead of gas	66%	+0%
Consider energy efficiency when buying whiteware / appliances	65%	-0%
Choosing energy efficient lights	65%	+2%
Choosing energy efficient appliances	64%	+1%
Using sustainable materials when building / renovating	44%	+6%
Driving less (in a petrol / diesel powered car)	34%	+10%
Reducing air travel	33%	+5%
Buying products with a low carbon footprint	32%	+5%
Considered carbon footprint when buying products	27%	+5%
Reducing intake of meat and other animal products	26%	+4%
Using EVs / Hybrid Vehicles instead of petrol / diesel vehicles	20%	+7%

IMPLICATION

The tide is continuing to turn

Gen Less has been launched into an atmosphere where New Zealanders are becoming increasingly open to conversations and actions around reducing greenhouse gas emissions.

We need to continue to harness this advantage.

The Gen Less Campaign

2

Gen Less – What is it?

Gen Less is the public facing expression of EECA's ethos – the idea that using less harmful energy will enable us to get more out of life.

It's how we express the idea of less is more to New Zealanders, and how we'll inspire them to reduce their harmful energy related greenhouse gas emissions.

The Gen Less campaign launched on 21 September during the opening of the Rugby World Cup, and has been released across a number of different platforms.

The campaign has initially targeted the hearts and minds of everyday New Zealanders.

It will continue to evolve with messaging specific to EVs, home energy and businesses.

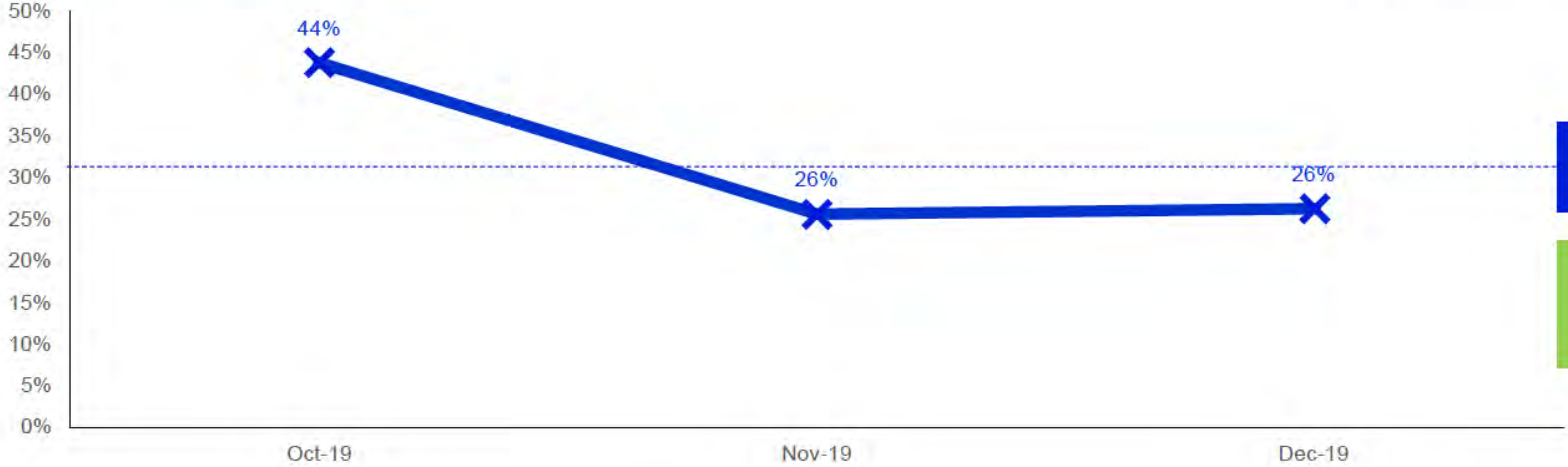
The campaign has moved into the 'what' phase with LED's.

Campaigns

Recognition of the campaign has been high, especially at launch

This will need reinforcing over time if we can to continue to build momentum. The 'why' as well as the 'what'.

Gen Less - Recognition



Target: 31% at any point in campaign

Recall = 26% for businesses in November 2019

GENLESS_RECALL. *Had you seen any of this material, or something similar?* ***Base:*** *Total sample n=789 New Zealanders; n=515 Businesses.*

TRA

Campaigns

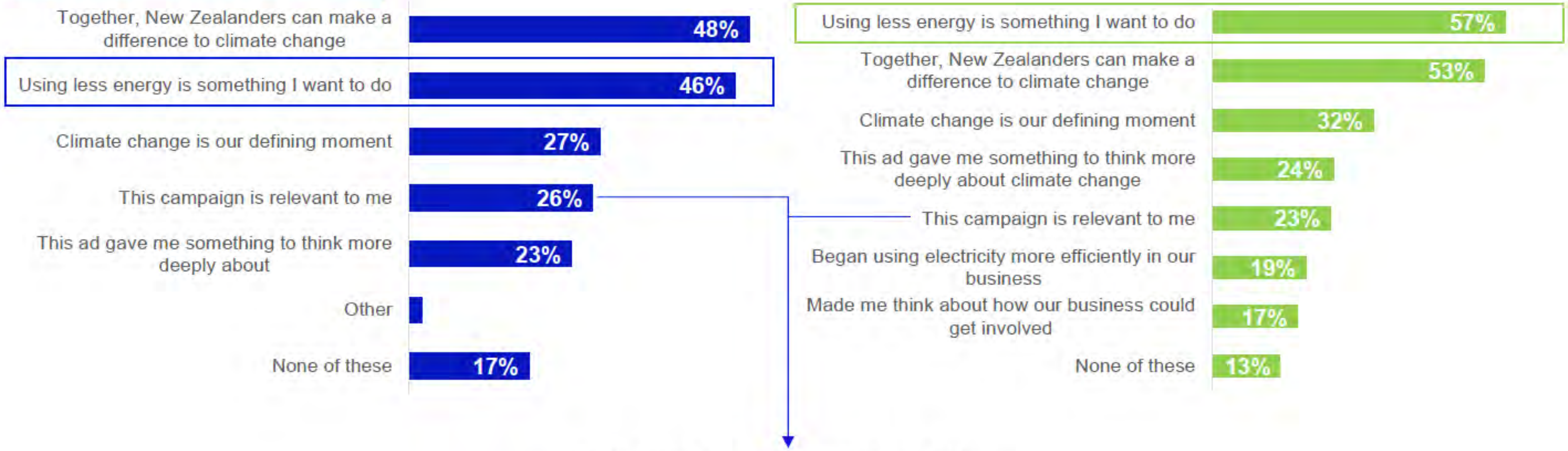
Likeability is also high, and people are on board with wanting to use less energy

We need to continue to build relevance.

Gen Less – Likeability

	New Zealanders	Businesses
	45%	41%

Gen Less – Message Outtake



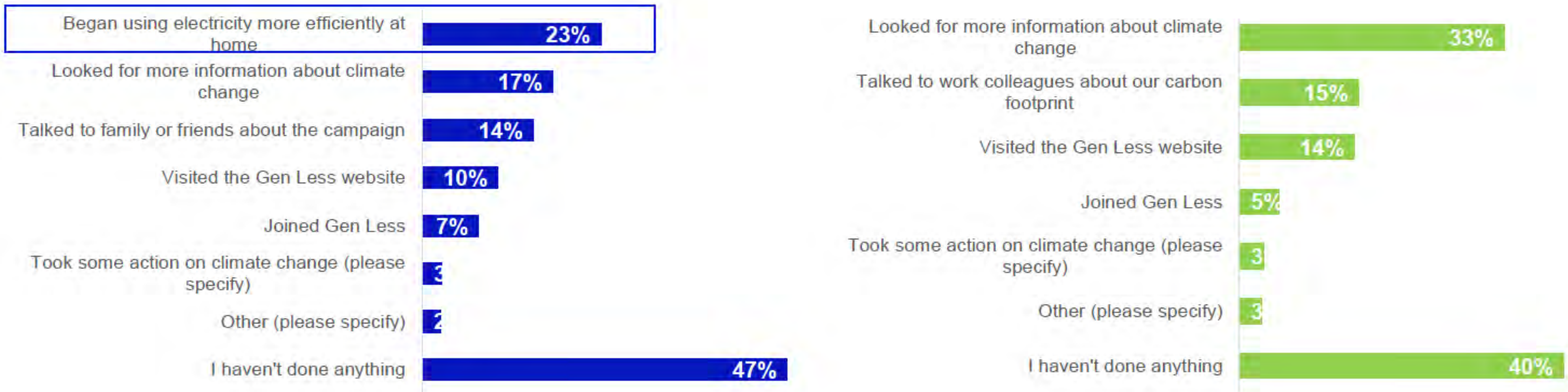
We need to also continue to build relevance through individual actions.

GENLESS_LIKE. *You answered earlier that you saw some of the images and/or the Gen Less campaign before today. How much do you like what you saw?*
GENLESS_PROMPT: *Which of these statements do you agree with after seeing the advertising?* ***Base:*** *Those who have seen any advertising n=311 New Zealanders; n=271 Businesses.*

Campaigns

And nearly a quarter say they've started using less energy as a result – how can we keep up this momentum?

Gen Less – Actions Taken



***GENLESS_ACTION**. As a result from seeing this advertising campaign, I ... **Base:** Those who have seen any advertising n=311 New Zealanders; n=271 Businesses.*

Campaigns

The campaign has resonated more with some groups in particular

Younger audiences, Aucklanders, and The Busy overindex on recognition and likeability. The Willing overindex on our key message outtakes.

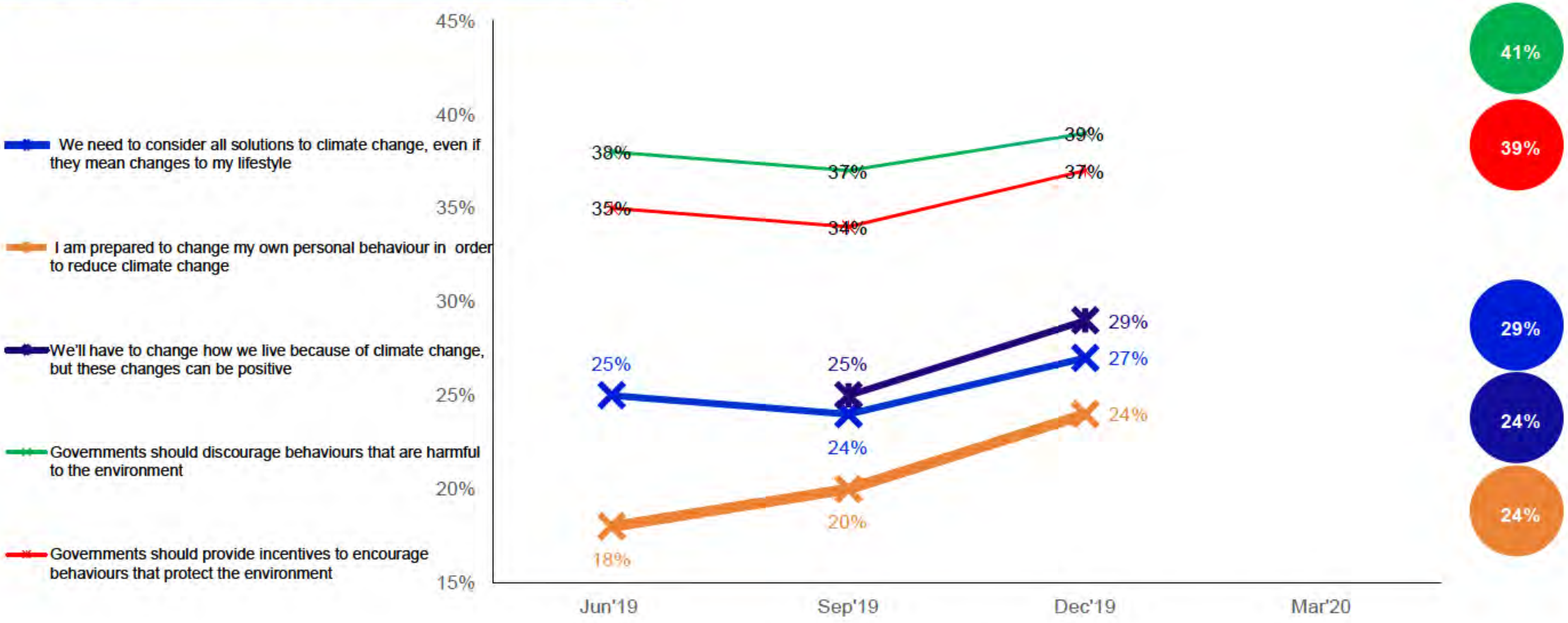
	Total	18 - 39 years	40 - 49 years	50 years or older	Auckland	Other	The Willing	The Busy	The Self Interested	The Complacent	The Unconvinced	NZ European	Maori / Pasifika	Asian
RECOGNITION	31%													
LIKING	45%													
MESSAGE OUTTAKE														
Together, New Zealanders can make a difference to climate change	48%													
Climate change is our defining moment	27%													
Using less energy is something I want to do	46%													
This ad gave me something to think more deeply about climate change	23%													
This campaign is relevant to me	26%													
ACTION														
Visited the Gen Less website	10%													
Joined Gen Less	7%													
Talked to family or friends about the campaign	14%													
Looked for more information about climate change	17%													
Began using electricity more efficiently at home	23%													
Took some action on climate change	3%													

TRA

Campaigns

Context and the campaign are starting to create a more fertile landscape for action

Gen Less Outcome Metrics – New Zealanders



*CLIMATE_BELIEFS How much do you agree or disagree that... Governments should discourage behaviours that are harmful to the environment. (Strongly Agree); Governments should provide incentives to encourage behaviours that protect the environment. (Strongly Agree); We need to consider all solutions to climate change, even if they mean changes to my lifestyle. (Strongly Agree); I am prepared to change my own personal behaviour in order to reduce climate change. (Strongly Agree); We'll have to change how we live because of climate change, but these changes can be positive. (Strongly Agree). **Base:** Total Sample - (n=504).*

TRA

Evidence of campaign performance is seen in differences between those who have seen the campaign and those who haven't

	Total	Seen Gen Less	Haven't seen Gen Less
Governments should discourage behaviours that are harmful to the environment	39%	43%	36%
Governments should provide incentives to encourage behaviours that protect the environment	37%	42%	33%
We need to consider all solutions to climate change, even if they mean changes to my lifestyle	27%	35%	21%
I am prepared to change my own personal behaviour in order to reduce climate change	24%	32%	18%
We'll have to change how we live because of climate change, but they can be positive changes	29%	37%	23%

CLIMATE BELIEFS How much do you agree or disagree that... Governments should discourage behaviours that are harmful to the environment. (Strongly Agree); Governments should provide incentives to encourage behaviours that protect the environment. (Strongly Agree); We need to consider all solutions to climate change, even if they mean changes to my lifestyle. (Strongly Agree); I am prepared to change my own personal behaviour in order to reduce climate change. (Strongly Agree); We'll have to change how we live because of climate change, but these changes can be positive. (Strongly Agree). ***Base:*** *Total Sample - (n=504).*

Campaigns

No movement is seen yet among businesses

This is unsurprising as our messaging hasn't yet targeted business decision makers and their actions.

Gen Less Outcome Metrics – Businesses

The Government needs to do more to reduce New Zealand's impact on the environment (Strongly Agree). We need to consider all solutions to climate change, even if it means changing how our business does things (Strongly Agree). Businesses can make a difference to climate change (Strongly Agree). Our business is taking steps to reduce its greenhouse gas emissions (Strongly Agree). I admire business leaders that prioritise actions to reduce climate change (Strongly Agree). ***Base:*** *Total Sample – n=515 Businesses.*

TRA

While the campaign has cut through, we can build stronger connection and associations with the Gen Less 'brand'

It is important that in addition to the primary goal of each of our comms, that they also serve to build long term brand equity.

This will give us a head-start in future communications if people already like the brand and know what it stands for.

This way each time people see the brand in the future it will get them thinking in the way we want them to, rather than the impact being limited to seeing a full advertisement.

GEN LESS

12%
Recognise the name
(9% of businesses)

4%
Recognise the logo
(3% of businesses)

25%
Have seen others use similar logos
(24% of businesses)

IMPLICATION

The Gen Less campaign has seen a positive initial response

People are largely indicating that they like the campaign.

In response, they're seeking out more information about reducing emissions, and some are even beginning to take actions.

And importantly, we've seen slight movements in our outcome metrics.

These will need to be continually reinforced. We also need to build momentum by rewarding people for their actions.

Segments will respond differently to the campaign depending on their level of commitment – The Willing are already onboard, whereas a changing landscape means new segments are continually coming into 'the why' of the campaign.

TRA

IMPLICATION

There are also clues for how to maximise impact moving forward

The campaign itself has been well recognised – however we can still do more work to build awareness of, and associations with, the Gen Less concept and symbol. If people know what these stand for, they can serve as assets that already hold value for us in future communications. Building partnerships is critical here.

While business decision makers have reacted to the campaign in a similar positive manner as regular New Zealanders, this hasn't yet . Channelling the positive momentum of the campaign (and of wider cultural discourse) into thinking about how I run a business will be key over the coming months.

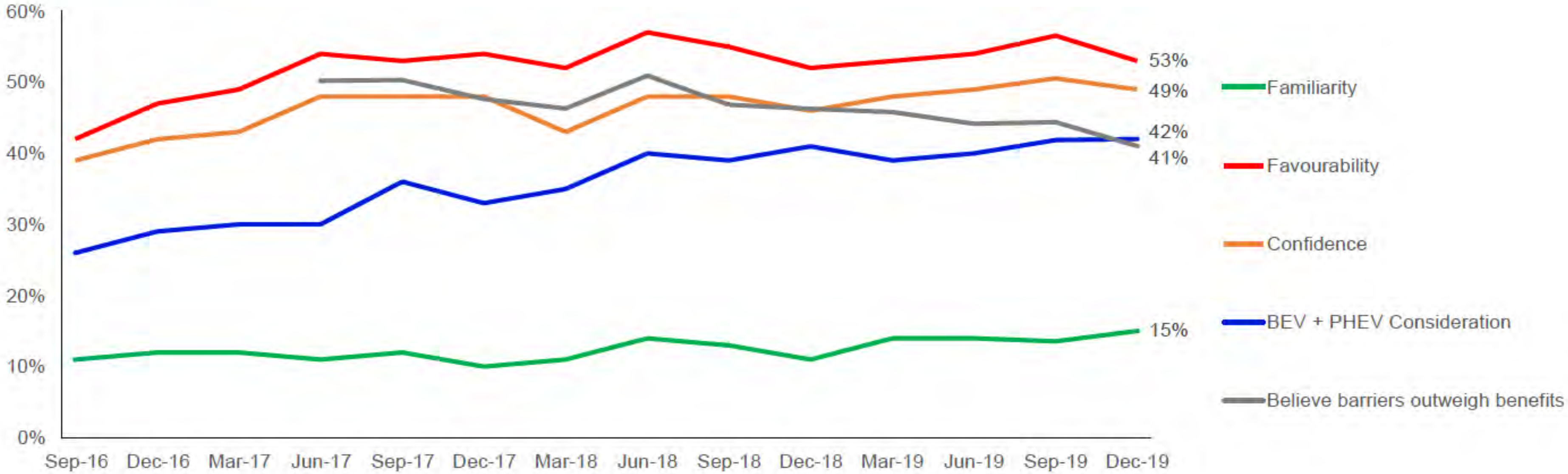
3

What else is happening?

Transport

Favourability towards EVs dips following a high, but so does the belief that barriers outweigh the benefits

EV Key Metrics



__EV3__ How would you rate your familiarity with Electric Vehicles? / __EV4__ How favourable or unfavourable is your overall opinion or impression of Electric Vehicles? / __EV5__ To what extent are you confident that Electric Vehicles can meet your needs? __Q177__ Thinking about your next vehicle purchase, how likely are you to consider the following vehicles? __Base:__ Total Sample - 3MR (n=789).

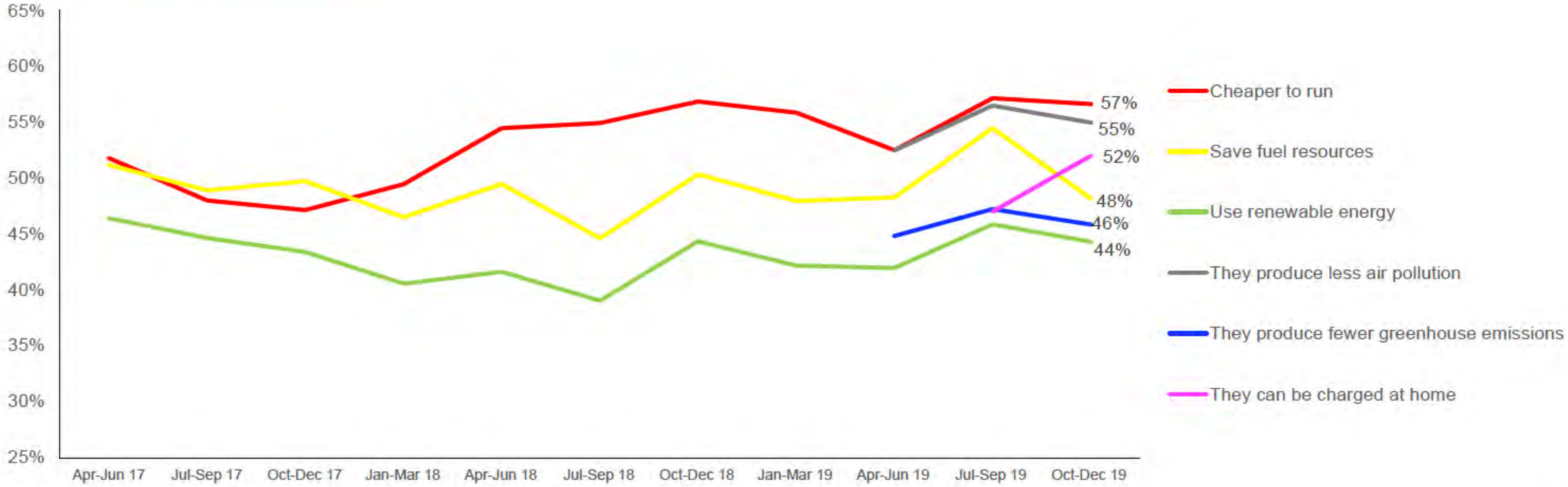
TRA

Transport

The perceived benefit of charging at home is becoming more prominent

This especially may resonate with the growing segment, “The Busy”.

Perceived Benefits of EVs



Q178. What is it about electric vehicles that would make you likely to consider them the next time you buy a vehicle? ***Base:*** *Current / intended car owners – 3MR (n=748).*

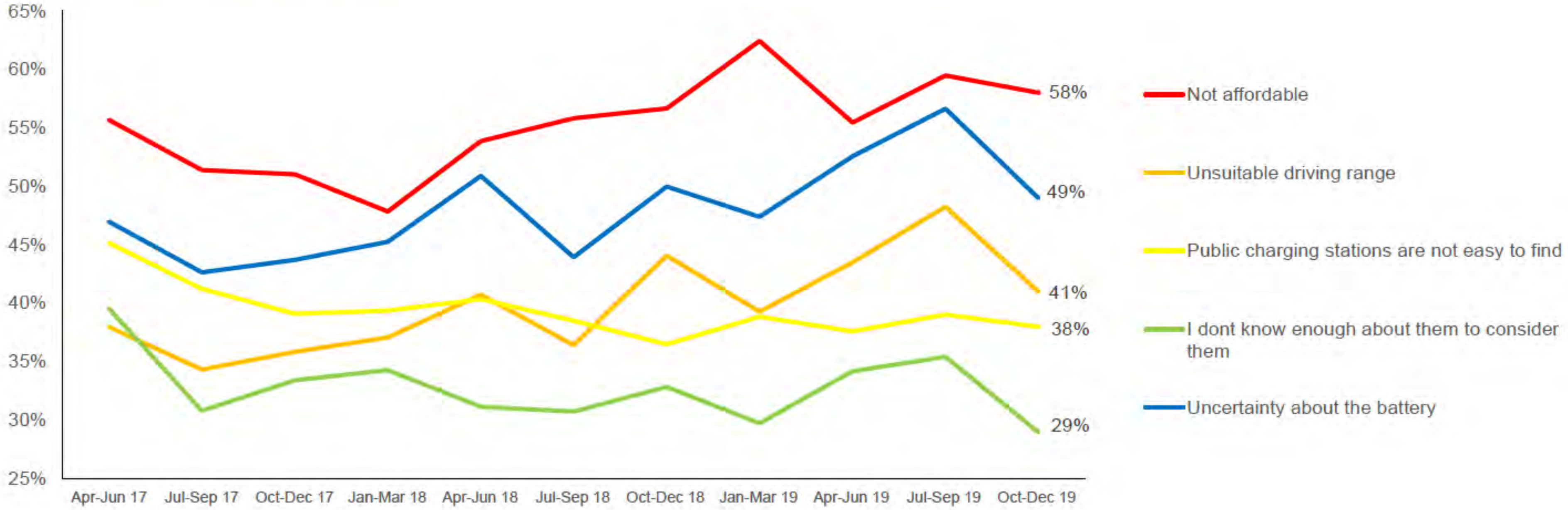
TRA

Transport

And some key barriers have become less widespread

Barriers around battery life, the accessibility of charging stations and awareness have declined this quarter.

Perceived Barriers of EVs



Q179. What is it about electric vehicles that would make you unlikely to consider them the next time you buy a vehicle? ***Base:*** *Current / intended car owners – 3MR (n=748).*

TRA

IMPLICATION

We're seeing an encouraging reduction in EV barriers

We've now reached a point where only 4 in 10 people believe that the barriers to them using EVs outweigh the benefits.

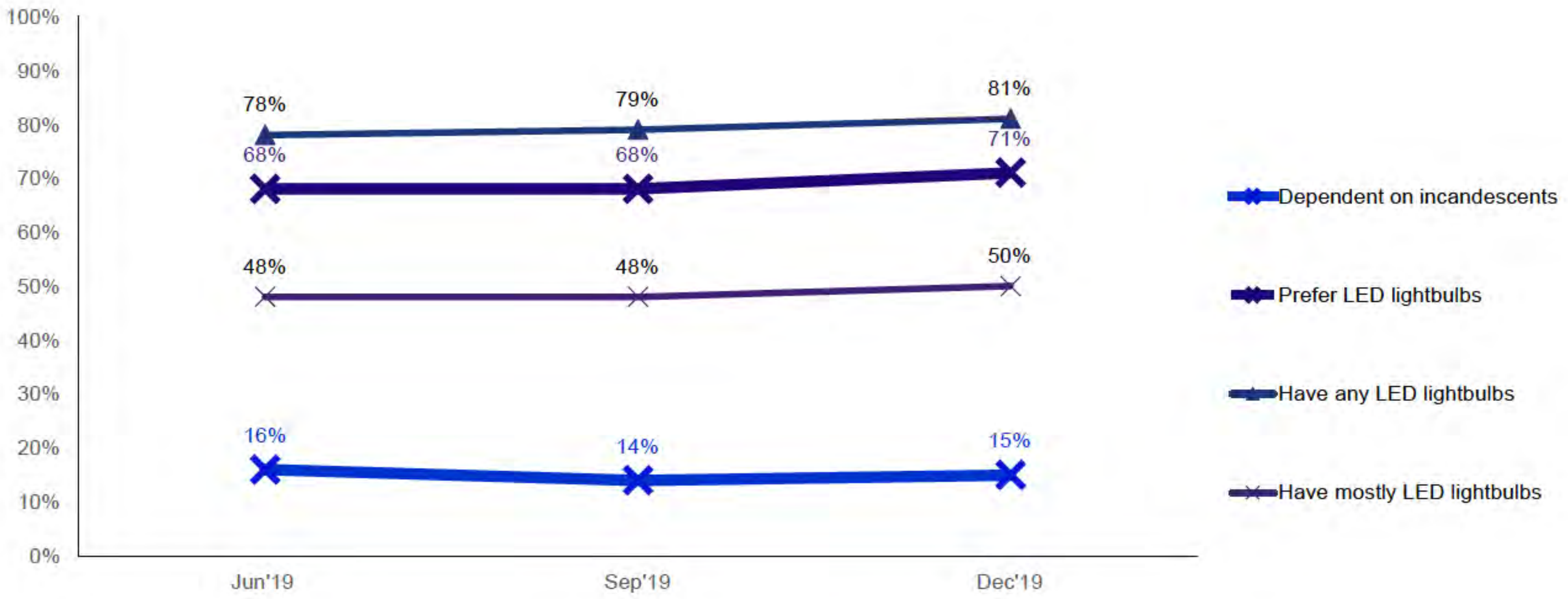
Examination of the individual barriers indicates that it is those related to infrastructure and education that have seen the greatest reduction.

Price remains to be seen as the strongest barrier to EV usage.

Energy Efficient Homes

Our key lighting metrics remain steady

There is a slight uptick in the % who prefer LEDs over other lightbulbs.



HOME_BULB_LED *How many of the lights in your home are LEDs?* ***HOME_BULB_TRAD*** *On a scale from 1 – 10, where a 1 means this wouldn t bother you at all and 10 means this would matter to you a lot, how would you feel if traditional (incandescent) lightbulbs were no longer available?* ***HOME_BULB_PREF*** *If you had these types of lightbulbs available to you, what type of lightbulbs would you prefer to buy?* ***Base:*** *Total sample - 3MR (n=789).*

TRA

Those who have seen the campaign are more likely to prefer and have LEDs

	Total	Seen Gen Less Bulbs	Haven't seen Gen Less Bulbs
		21%	79%
LED Preference	73%	74%	72%
Have any LEDs	85%	90%	83%
Have mostly LEDs	53%	64%	51%

***GENLESS_BULBS_RECALL**. Before today, has you seen any of this material, or something similar? (n=512).*

Interestingly, those who have seen the campaign are also more likely to be bothered by the removal of incandescents.

This is largely a function of who we have been reaching with the campaign.

	Total	Seen Gen Less Bulbs	Haven't seen Gen Less Bulbs
Dependent on incandescents	16%	25%	14%

Gen Less Bulb recognisers over-index on being younger, from Auckland, and non-NZ European.

These demographic groups are the same ones more that have shown concern around the removal of incandescent lightbulbs.

GENLESS_BULBS_RECALL. *Before today, has you seen any of this material, or something similar? (n=484).*

IMPLICATION

Those who have seen Gen Less Bulbs are more likely to prefer LEDs

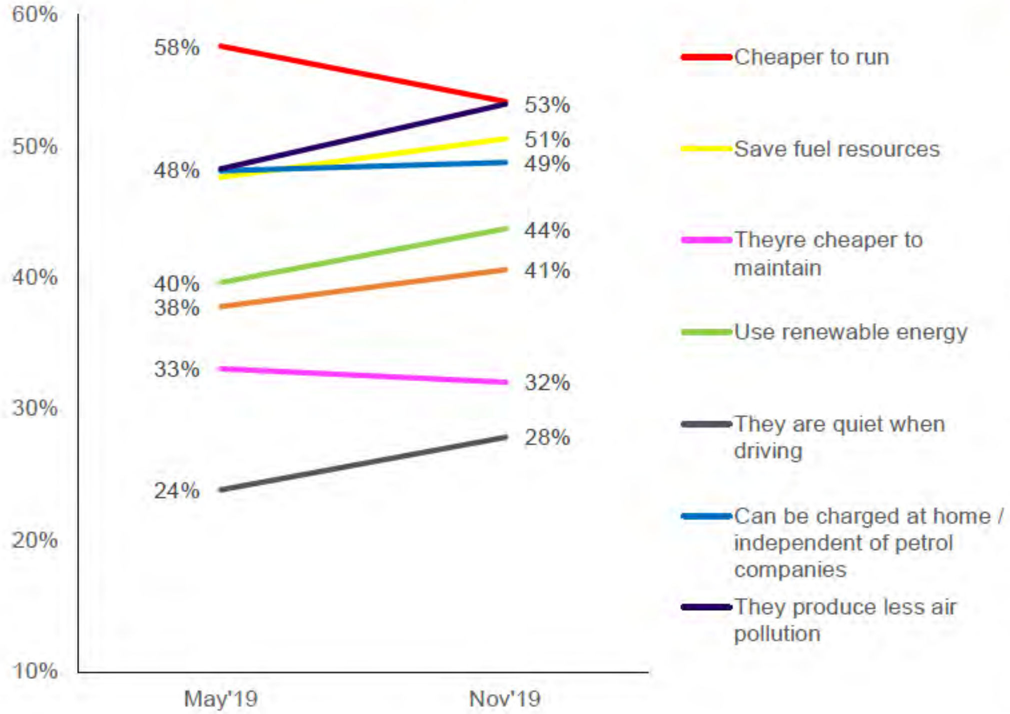
This group is more likely to actually have LEDs in their home also.

The groups that the campaign has been reaching are those who would be most affected by the removal of incandescent lightbulbs.

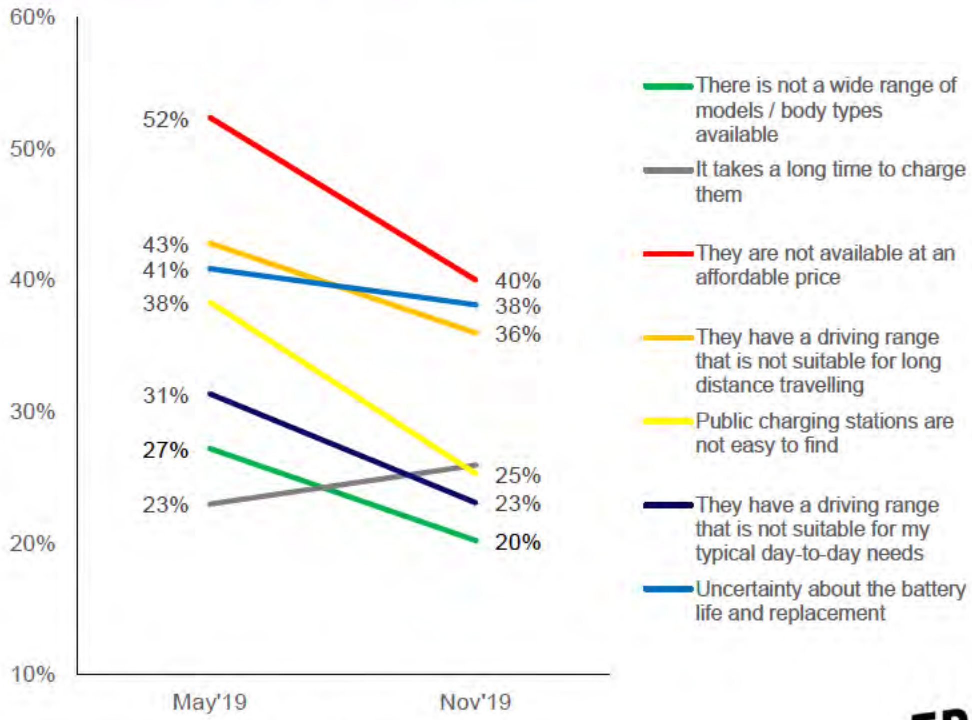
Businesses

Similar to regular New Zealanders, some key barriers to EV usage are declining for businesses

Perceived Benefits of EVs



Perceived Barriers of EVs



EV_BENEFITS. What is it about electric vehicles that would make you likely to consider them the next time you buy a vehicle? EV_BARRIERS. What is it about electric vehicles that would make you unlikely to consider them the next time you buy a vehicle? Base: Current / intended car owners – 3MR (n=434).

TRA

There is an appetite for emissions reduction information, however few know where to find it

78%
are interested in information about how to lower the carbon emissions of the business

27%
know where to find this information

22%
actively seek it out

16%
have done so in the last 3 months

INFO_ABILITY: How much do you agree/disagree that you know where to access information about how to reduce your business's carbon emissions?
INFO_INTEREST: What best describes your level of interest in finding informa ion or advice that can help you lower your business's carbon emissions?
INFO_SEEK: In he past 3 months, have you looked for information or advice that can help you lower your business's carbon emissions?
Base: Total Sample n=515. Source: EECA Business Monitor

IMPLICATION

Businesses are also riding the wave of momentum around reducing emissions

As seen in the Gen Less metrics, this hasn't necessarily carried over from personal beliefs to business decisions however.

Businesses need the prompt to be 'first movers' when it comes to changing behaviour in their respective industries, and also need to be made aware of the resources available to them in lowering the carbon emissions in their business.

Bringing it all together

4

Gen Less is effectively riding a wave of cultural momentum

New Zealanders have reacted well to the campaign.

They also see themselves to be taking more actions related to reducing their emissions.

Business decision makers also are onboard with the message, although this hasn't yet filtered through to their day to day operations.

So what will be the key principles to remember in guiding our actions over the coming months?

Key principles for 2020

#1 Keep momentum going - it's still about the 'why' as well as the 'how' and the 'what'

#2 Build partnerships to leverage with Gen Less, particularly around businesses

#3 Give emotional rewards to those who are beginning to take actions – particularly The Willing

tra.co.nz hello@tra.co.nz +64 9 377 8129

TRA

Appendix Five: Gen Less Intervention Logic and Impact Monitoring – 2.0 Results

JULY 2021

EECA Consumer Monitor

EECA

TRA

What we do

Monitor the mood of the nation around climate change, energy efficiency and topics like EVs:

Track New Zealanders' response to key issues and initiatives relevant to EECA through two tracking monitors.

The monitors are designed to assess how we're going vs. our strategic focus areas.

1. CONSUMER MONITOR

250 New Zealanders aged 18+ per month, 750 per quarter. This is an 'always on' monitor, with sample collected weekly. This report represents views collected between April and June 2021.

2. BUSINESS MONITOR

Every 6 months we survey a representative selection of New Zealand businesses, sampling between 500 and 600 business decision makers in relevant areas. The most recent data was collected in May 2021 and is presented in a separate report.

Overview

The focus of this report is to both show how different measurements have trended over the last two years and to provide a snapshot into how people are currently feeling.

SECTION 1 looks at the bigger picture, how consumers are feeling post-COVID and what relevant conversations are taking place through media.

SECTION 2 explores New Zealanders' mindsets and climate behaviour, looking at trends over time.

SECTION 3 summarises the results from Gen Less 2.0 and provides some key learnings to build on for Gen Less 3.0.

SECTION 4 presents key attitudes towards electric vehicles and how this has changed over time.

The key story this quarter is one of stability and opportunity. Consumers are emerging from COVID with most of their attitudes towards climate change in tact: there's a broad picture of stability in climate beliefs.

But there are signs that engagement with climate issues is more surface-level – from the media and beyond. And although there's arguably more headspace for New Zealanders to think 'bigger picture', several issues have seen a downturn in the importance consumers place on them – climate included.

In this context Gen Less has an increasingly important role. The next iteration can build on successes to date, with growing cut-through and resonance. There's significant opportunity to galvanise younger people into action, requiring stronger social investment.

Agenda

1

The wider context

2

The link between actions and system change

Trended analysis

3

Gen Less 2.0

Campaign analysis

4

EVs

Key metrics and trends over time

1

The wider context

On the whole, there is a steady sense of optimism among New Zealanders

Half of the population think that the New Zealand economy will improve in the next 12 months.

Job prospects are changing for the better.

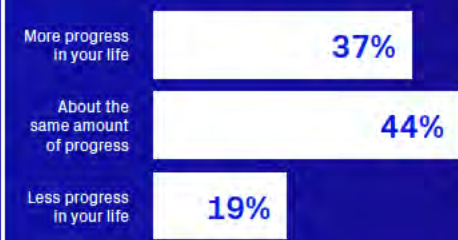
- 34% of people are looking forward to getting more income in the next 12 months.
- The employment rate has returned to pre-pandemic levels.

COVID-19 is not as front-of-mind any more for New Zealanders.

- Nearly half of New Zealanders are now feeling passive towards COVID-19.
- Only 1 in 4 have negative sentiment toward the pandemic, with most having a sense of pride in NZ's response.

For most New Zealanders, COVID-19 has not interrupted their progress in life.

PERCEIVED LIFE PROGRESS COMPARED TO TWO YEARS AGO



Data source: TRA DPMC Project, June 2021.

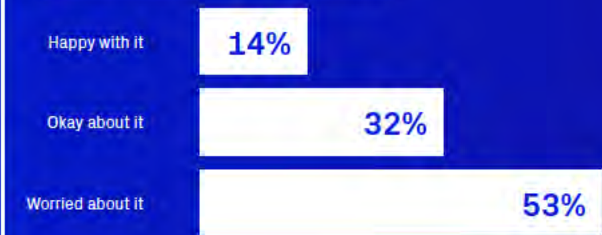
There are, of course, bubbling concerns surfacing, reflecting an undercurrent of uncertainty

The country's finances are still top of mind with 51% of New Zealanders saying that they still spend time thinking about the impact of COVID-19 on the economy.

And inflationary expectations are a surfacing concern.

While New Zealanders are mostly fine with opening the bubble to limited people, there is an underlying worry for opening New Zealand up more broadly.

QUARANTINE FREE TRAVEL TO AND FROM OTHER COUNTRIES OTHER THAN AUSTRALIA AND THE COOK ISLANDS



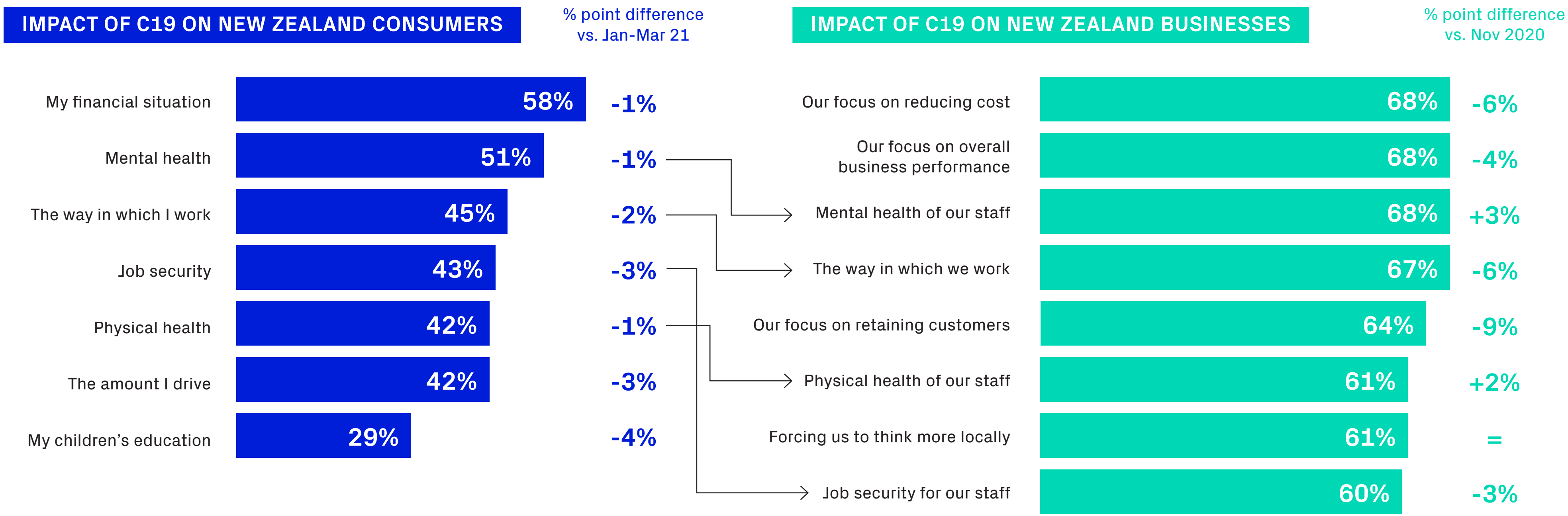
Although employment figures are positive on a surface level, job security is a big concern for people.

- One in three are afraid of losing their job.
- 23% said that job security was a major thing in life they think about.
- 59% said that getting by financially was a major thing in life they think about.

Data source: TRA DPMC Project, June 2021.

We see the impacts of COVID are still felt, but they're fading and are much less pronounced among consumers compared to business

Although concerns are diminishing, still well over half of New Zealanders feel the impact of COVID-19 on their financial situation.

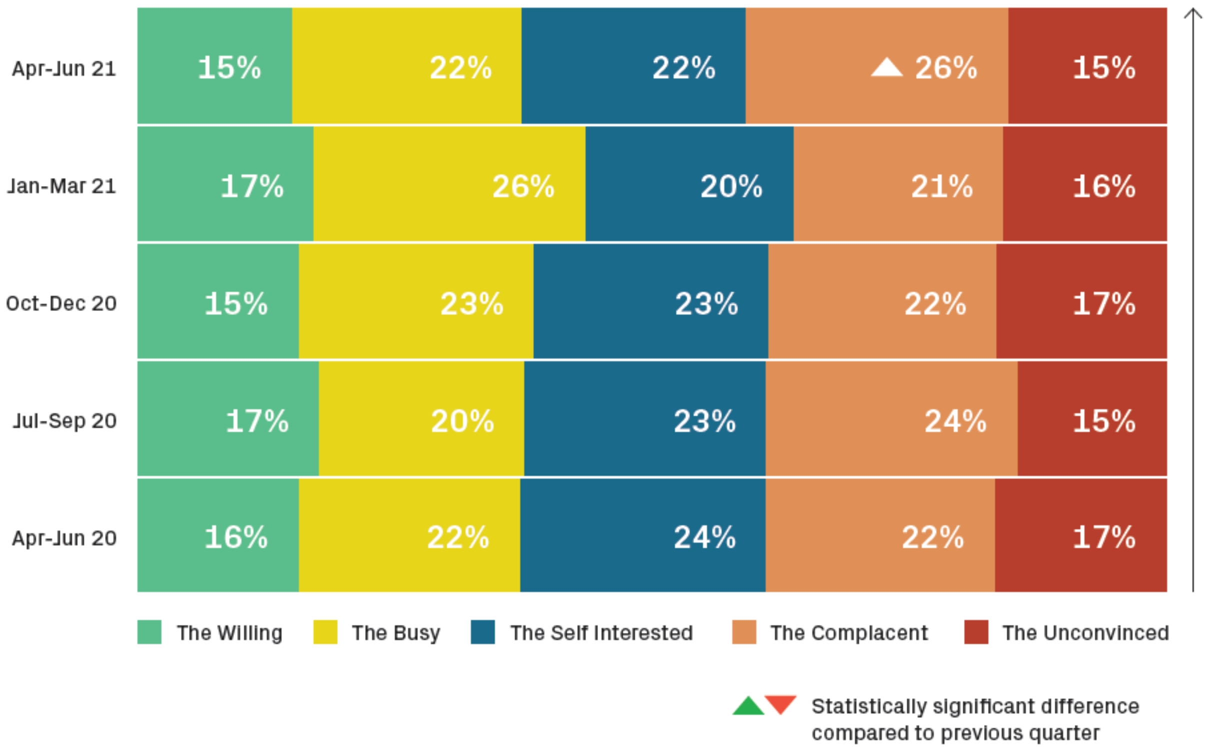


C19_CURRENT - And in which of these ways is the COVID-19 situation impacting your business currently? (Some impact / Significant impact / Huge impact) Base: Total Sample - (n=623).
C19_CURRENT - And in which of these ways is the COVID-19 situation impacting you currently (Some impact / Significant impact / Huge impact) Base: Total Sample – (n=762)

We've seen a significant uplift in the Complacent segment

Wider Context

SEGMENTS - % OF NEW ZEALAND BUSINESSES



EECA Segments. Base: Total Sample – n =between 762-824

The Complacent have seen a significant increase this quarter from 21% to 26%. The Self Interested have also seen an increase, however this is following periods of trending downwards.

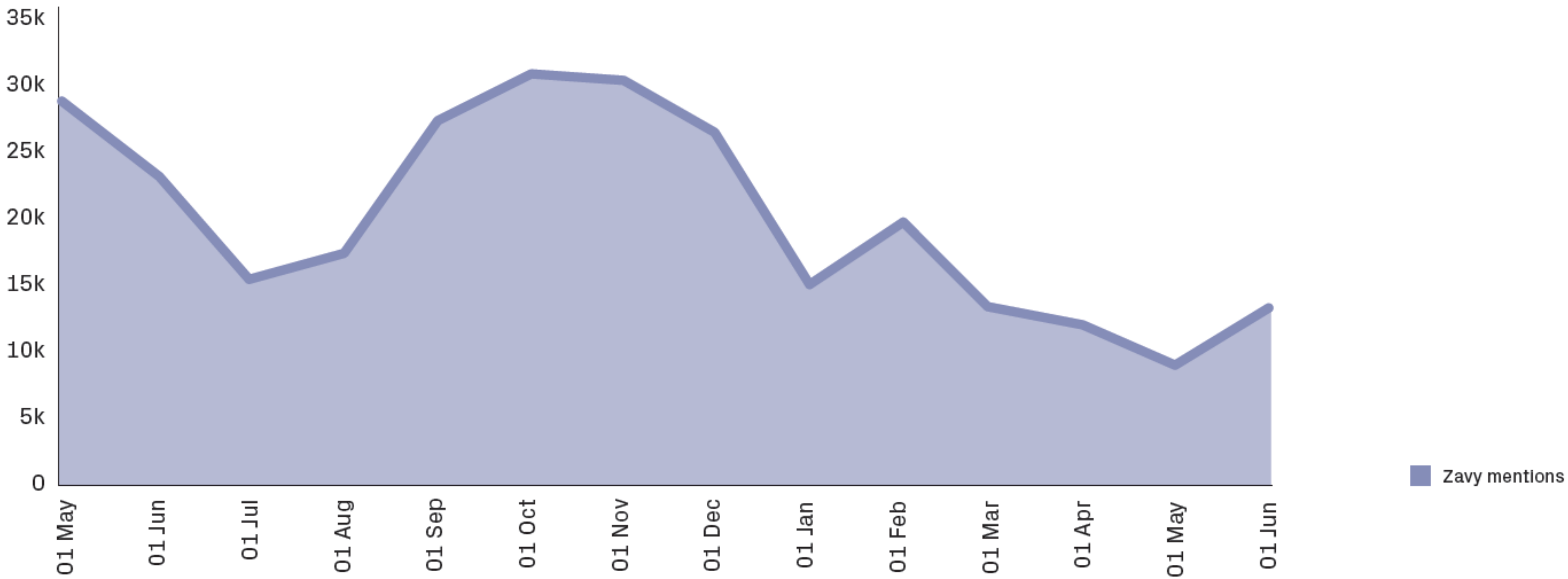
There have been attendant, slight decreases in The Willing, The Busy and The Unconvinced.

With more people Complacent and less people Willing, Kiwis seem to be enjoying settling back to 'normal'.

TRA

We see less media coverage around climate change

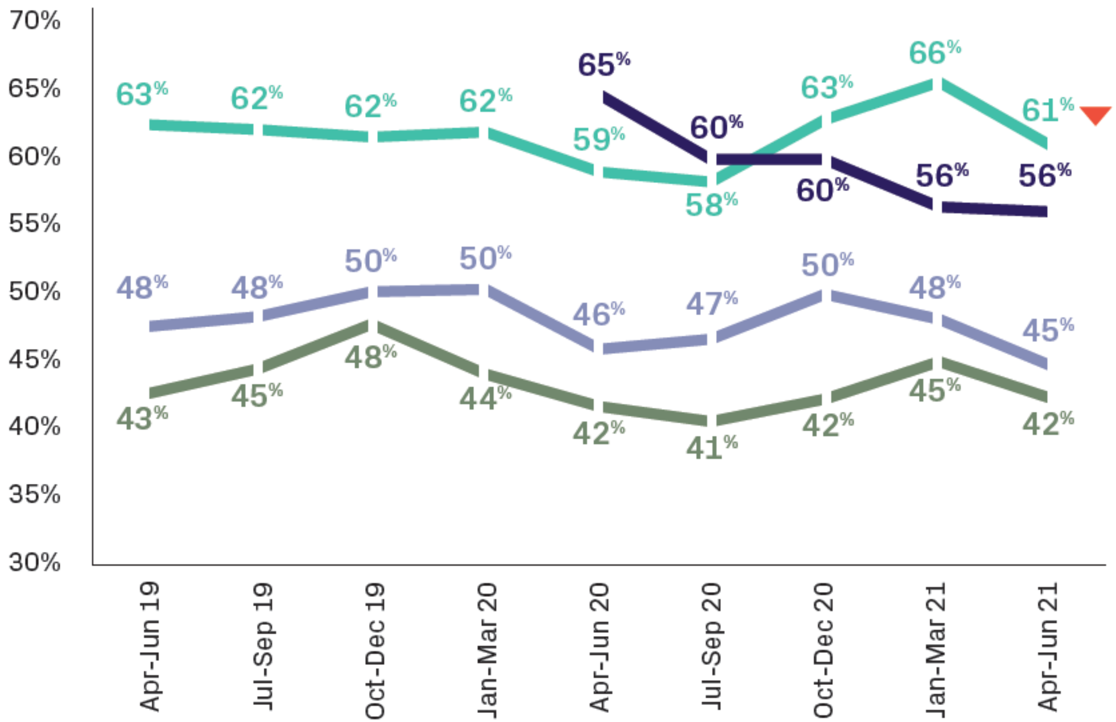
CLIMATE CHANGE / SUSTAINABILITY MENTIONS ACROSS NZ MEDIA



Source: Zavy Radar

And we see sentiment that climate change is a very important NZ issue has fallen over the past 6 months

ISSUES FACING NEW ZEALAND OVER TIME (VERY IMPORTANT)



CLIMATE CHANGE – GENERAL ISSUES	Oct-Dec 20	Apr-Jun 21
5 (Very Important)	50%	45% ▲
4	23%	29% ▼
3	16%	15%
2	4%	6%
1 (Not Important)	4%	4%

Taking a granular view, people still see climate change as important, it's just lower in priority (with fewer seeing it as 'very important') than it was 6 months ago.

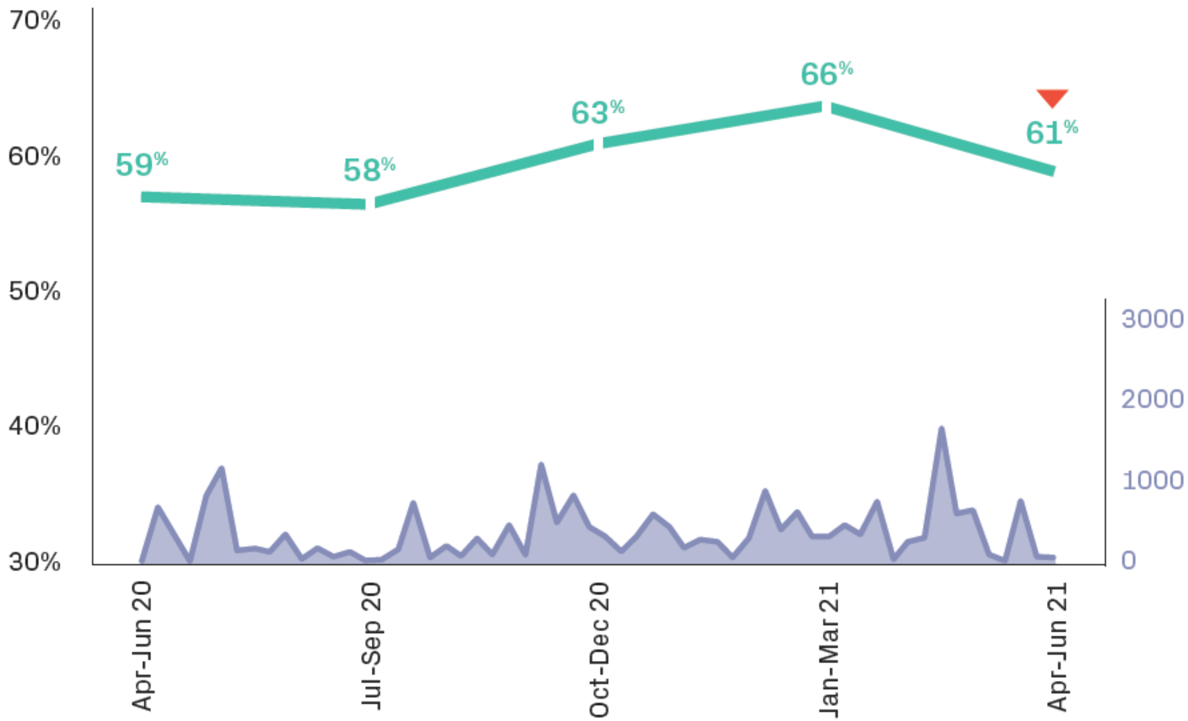
But other issues are reducing in prominence too – the economy is now less of an issue, and concern about affordable housing has also dipped.

- Availability of affordable housing
- New Zealand's economy
- Climate change
- Reducing greenhouse gas emissions
- ▲▼ Statistically significant difference compared to previous period/quarter:

GENERAL_ISSUESr: X- How important do you consider each of the following issues to be for New Zealand? (Very important)
Consumer Monitor: Apr-Jun 21 n=762, Jan-Mar-21 n=779, Oct-Dec 20 n=796, Jul-Sep 20 n=775, Apr-Jun-20 n=824. Business Monitor: May 2021 n=623

The mood towards key issues closely tracks media coverage

ISSUES FACING NEW ZEALAND OVER TIME (VERY IMPORTANT)



Note: Zavy mentions refers to public engagement with digital media (websites, news articles and social media posts). This has been filtered to only include NZ sources and is shown on a weekly basis.

Availability of affordable housing

Zavy mentions of 'affordable housing'

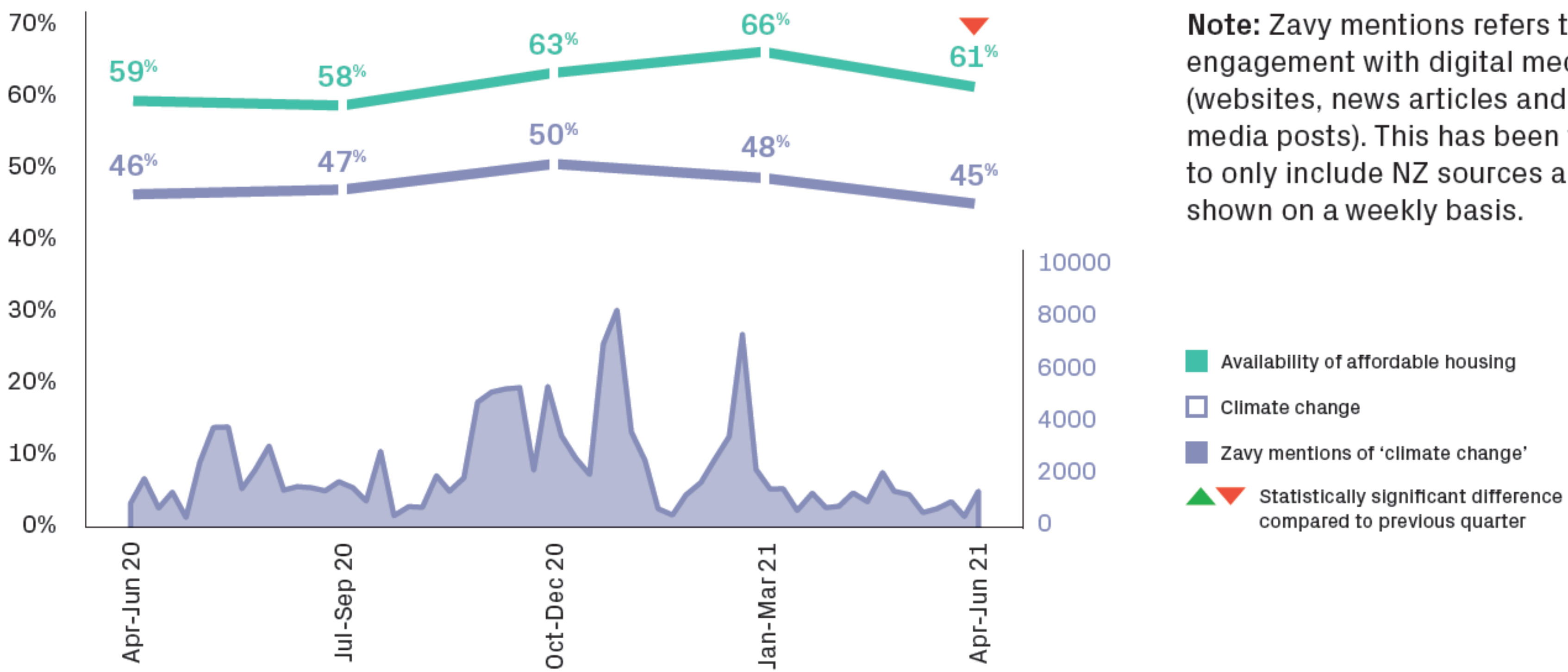
Statistically significant difference compared to previous quarter

GENERAL_ISSUESr: X- How important do you consider each of the following issues to be for New Zealand? (Very important)
Consumer Monitor: Apr-Jun 21 n=762, Jan-Mar-21 n=779, Oct-Dec 20 n=796, Jul-Sep 20 n=775, Apr-Jun-20 n=824. Business Monitor: May 2021 n=623

TRA

Climate concern also tracks media – but with higher overall coverage and lower levels of concern

ISSUES FACING NEW ZEALAND OVER TIME (VERY IMPORTANT)



Note: Zavy mentions refers to public engagement with digital media (websites, news articles and social media posts). This has been filtered to only include NZ sources and is shown on a weekly basis.

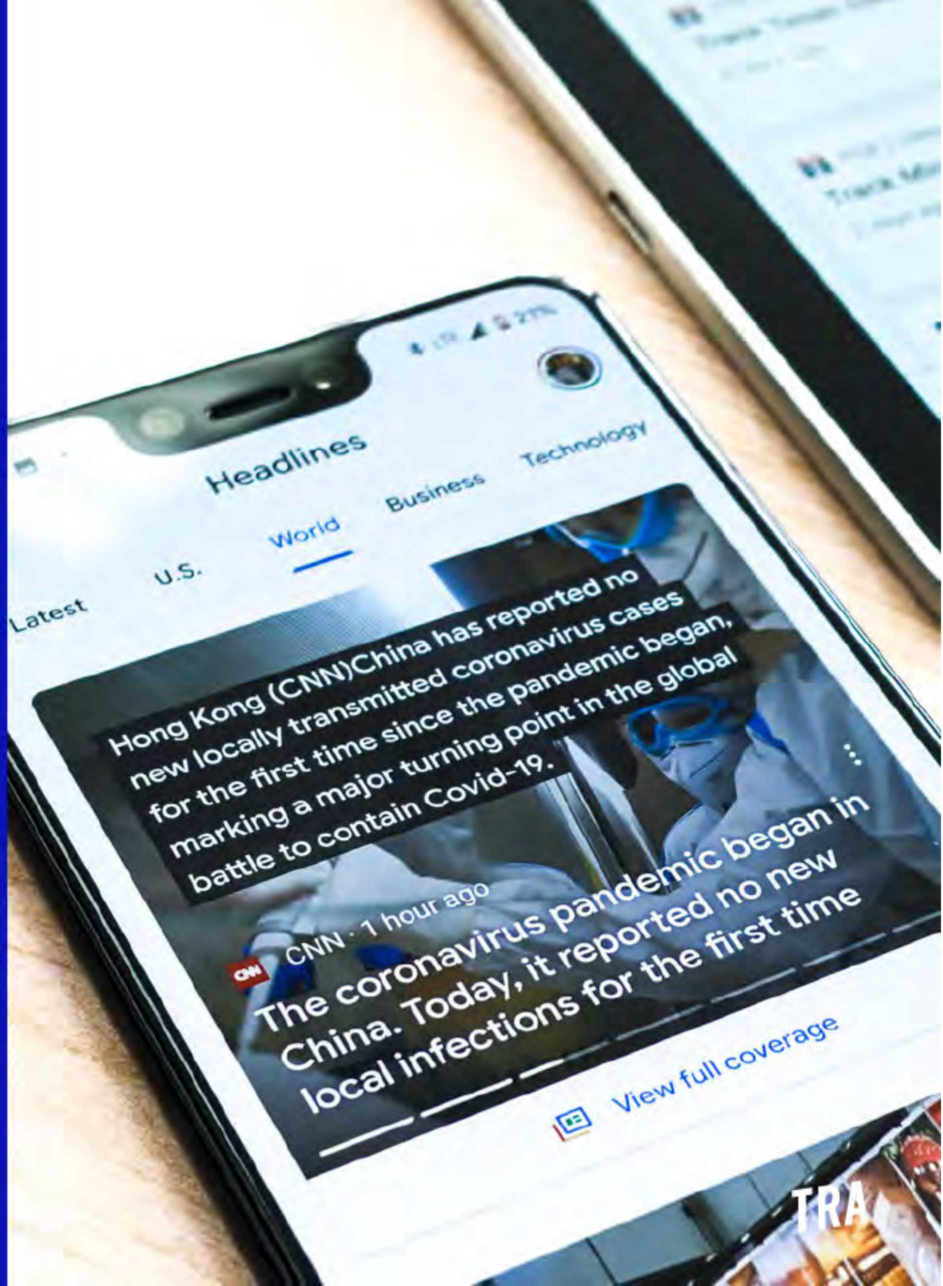
GENERAL_ISSUESr: X- How important do you consider each of the following issues to be for New Zealand? (Very important)
Consumer Monitor: Apr-Jun 21 n=762, Jan-Mar-21 n=779, Oct-Dec 20 n=796, Jul-Sep 20 n=775, Apr-Jun-20 n=824. Business Monitor: May 2021 n=623

TRA

Fueling media conversation is absolutely key to keeping New Zealanders engaged with the cause.

The increasing headspace among consumers post-COVID and recent lull in coverage highlights an opportunity gap to fill.

IMPLICATION



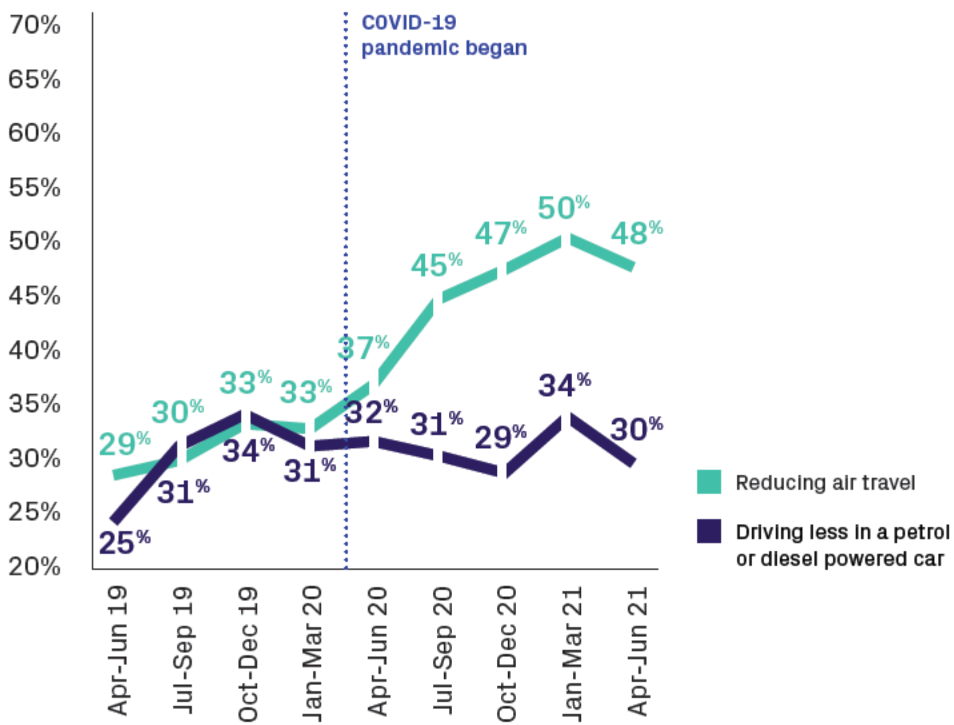
The link between actions and system change

Trended analysis

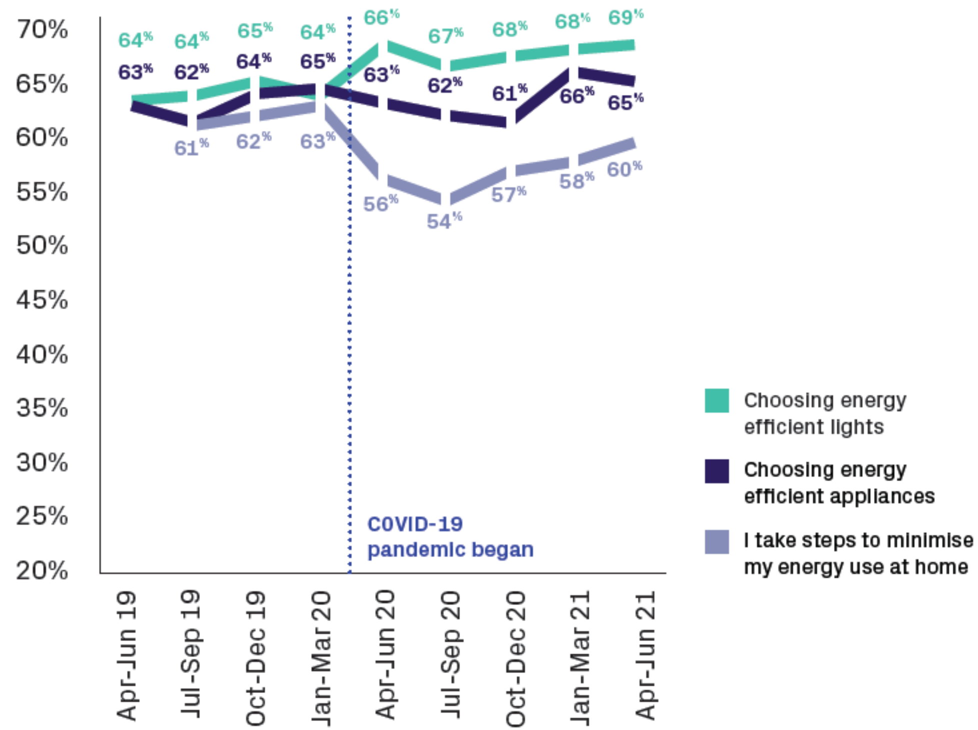
2

Changes in consumer climate actions over time look to be COVID-related

CLIMATE ACTIONS – TRANSPORT RELATED



CLIMATE ACTIONS – ENERGY RELATED



CLIMATE_ACTIONS – Which of the following actions do you take in order to reduce your climate change impact? (T2B Take Regular Action)
Base: n = between 762 - 824

TRA

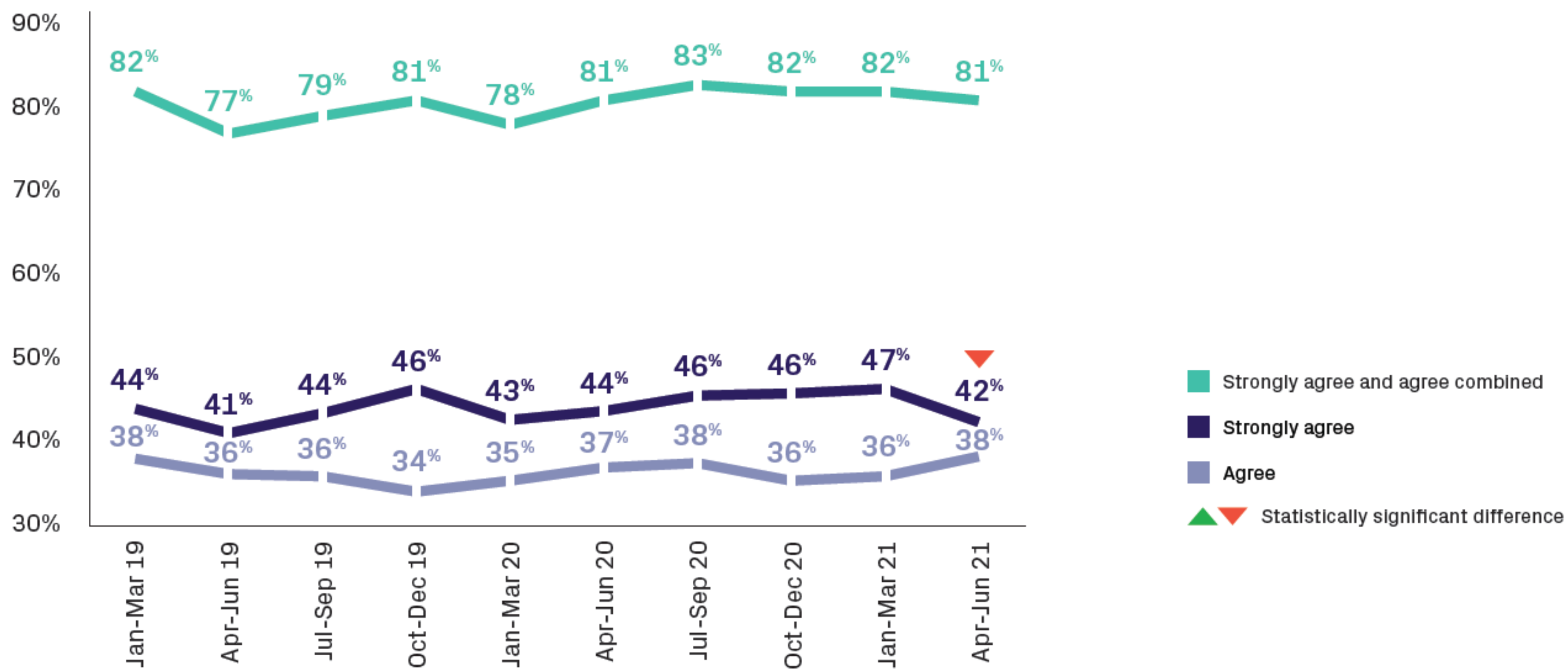
IMPLICATION

After the jolt of COVID, climate actions seem to be trending back to 'normal' – the 'reducing transport' related actions are beginning to decrease, and 'reducing energy' related actions are increasing once more – perhaps as people fully adjust to the reworked boundaries between home and workplace.

It's a key moment to encourage consumers to think beyond their old ways; they've adjusted to a pandemic-induced 'new normal' and they can adjust to a more climate-aware society too.

Overall concern with climate change is stable long-term

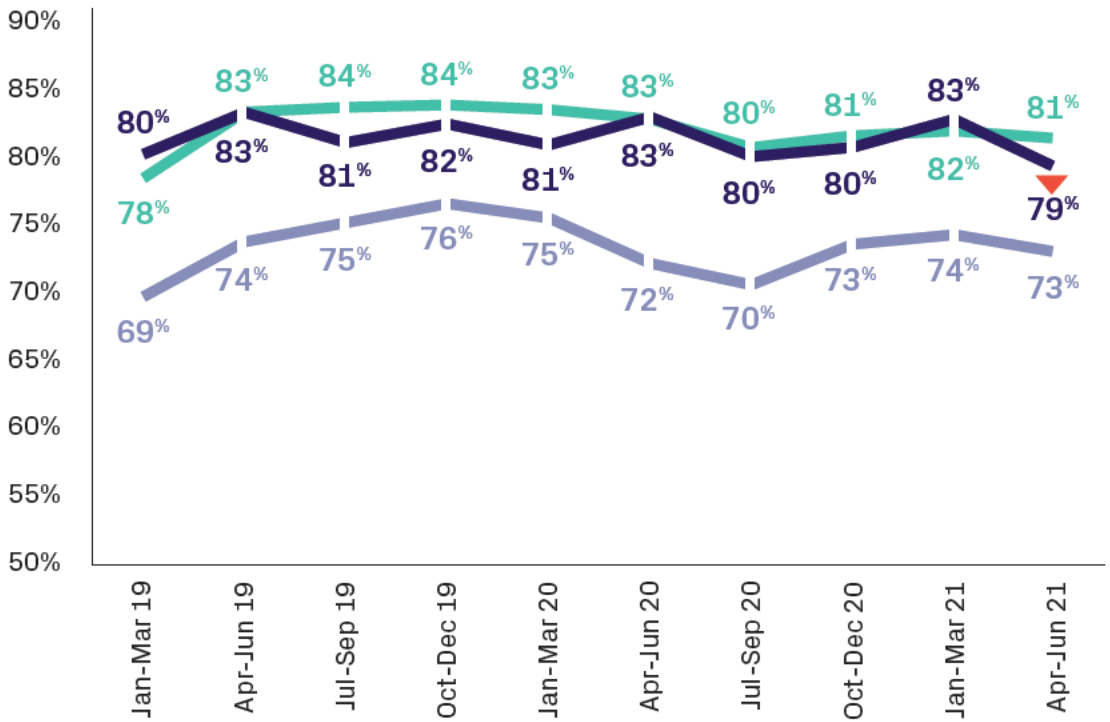
CLIMATE CHANGE IS REAL



CLIMATE_BELIEFS – How much do you agree or disagree that... – Not Stated REMOVED - NET T2B AGREE
Base: n = between 762 - 824

People generally have high levels of support for government intervention

CLIMATE BELIEFS – 'GOVERNMENT' STATEMENTS (T2B)



Only support for government incentives has seen a decrease this quarter.

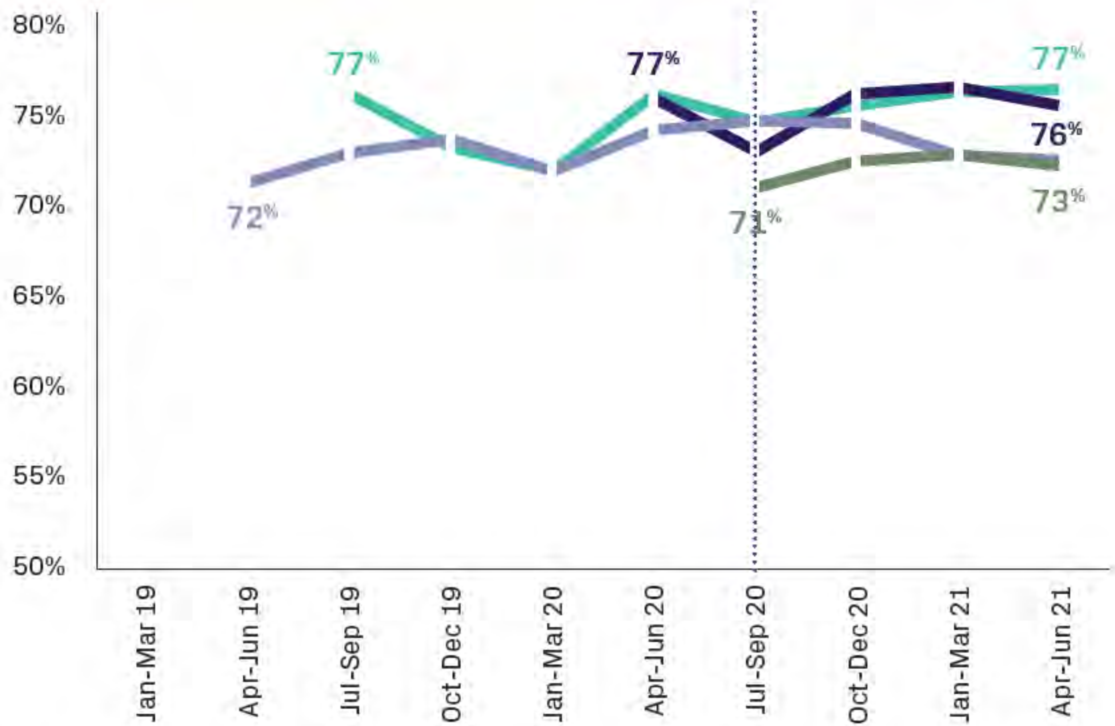
At a monthly level, June saw a significant decrease for this belief, suggesting the Clean Car Discount (announced mid-June) had an impact on this change.

CLIMATE_BELIEFS – How much do you agree or disagree that… – Not Stated REMOVED - NET T2B AGREE
Base: n = between 762 - 824

TRA

Beliefs around collective action are stable, particularly over the past year

CLIMATE BELIEFS – 'COLLECTIVE' STATEMENTS (T2B)



Overall strength of belief has recovered since a dip post-COVID in July – September 2020.

The idea of being a 'team of 5 million', which was felt throughout 2020, could have impacted these trends.

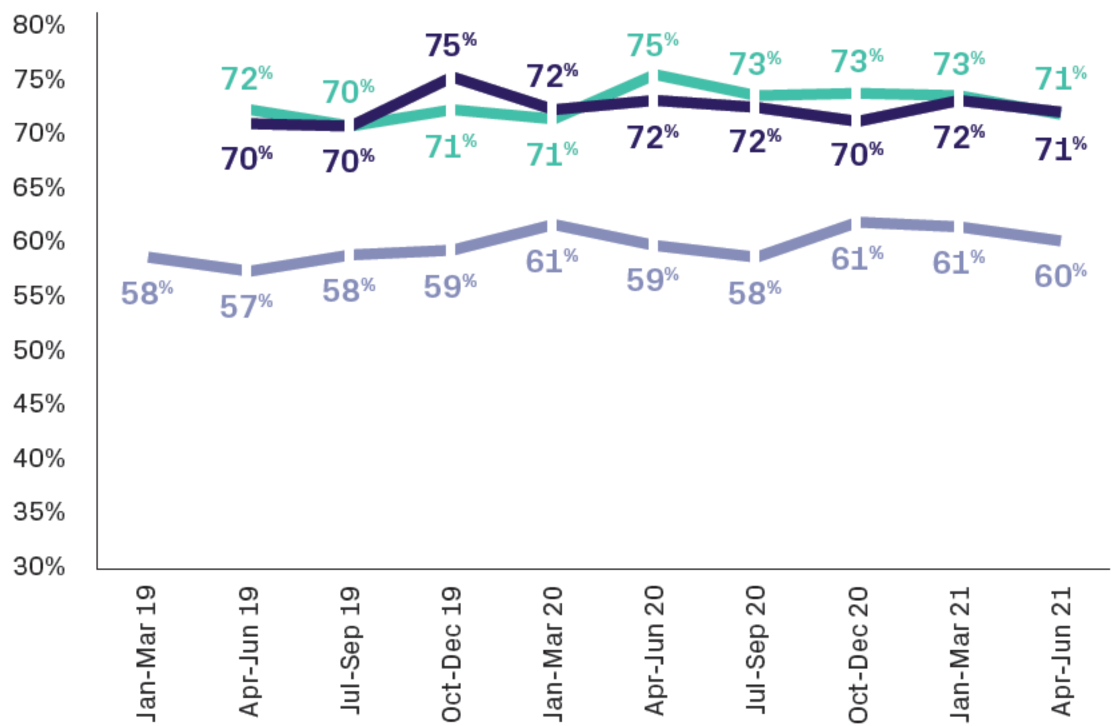
- We'll have to change how we live because of climate change, but these changes can be positive
- Human activity (e.g. burning fossil fuels) is affecting how fast the climate is changing
- We need to consider all solutions to climate change, even if they mean changes to my lifestyle
- We need to make changes to our energy use to address climate change, even if it means a change to our current lifestyle

CLIMATE_BELIEFS – How much do you agree or disagree that… – Not Stated REMOVED - NET T2B AGREE
Base: n = between 762 - 824

TRA

Climate beliefs about individual actions are also steady

CLIMATE BELIEFS – 'INDIVIDUAL' STATEMENTS (T2B)



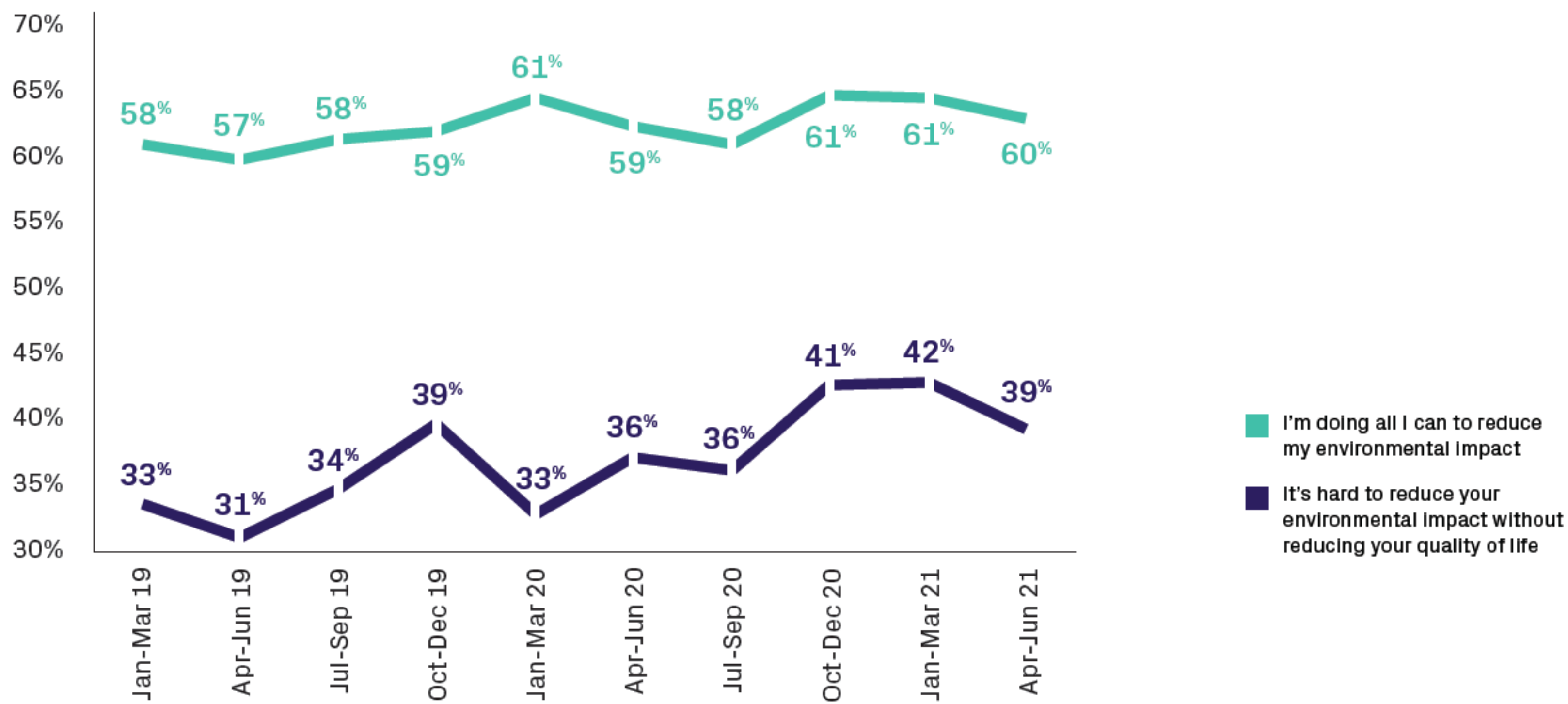
There is a persistent gap between attitudes that 'I'm doing all I can' and 'I'm prepared to change'. This shows significant opportunity in growing engagement in more climate-friendly behaviour.

CLIMATE_BELIEFS – How much do you agree or disagree that… – Not Stated REMOVED - NET T2B AGREE
Base: n = between 762 - 824

TRA

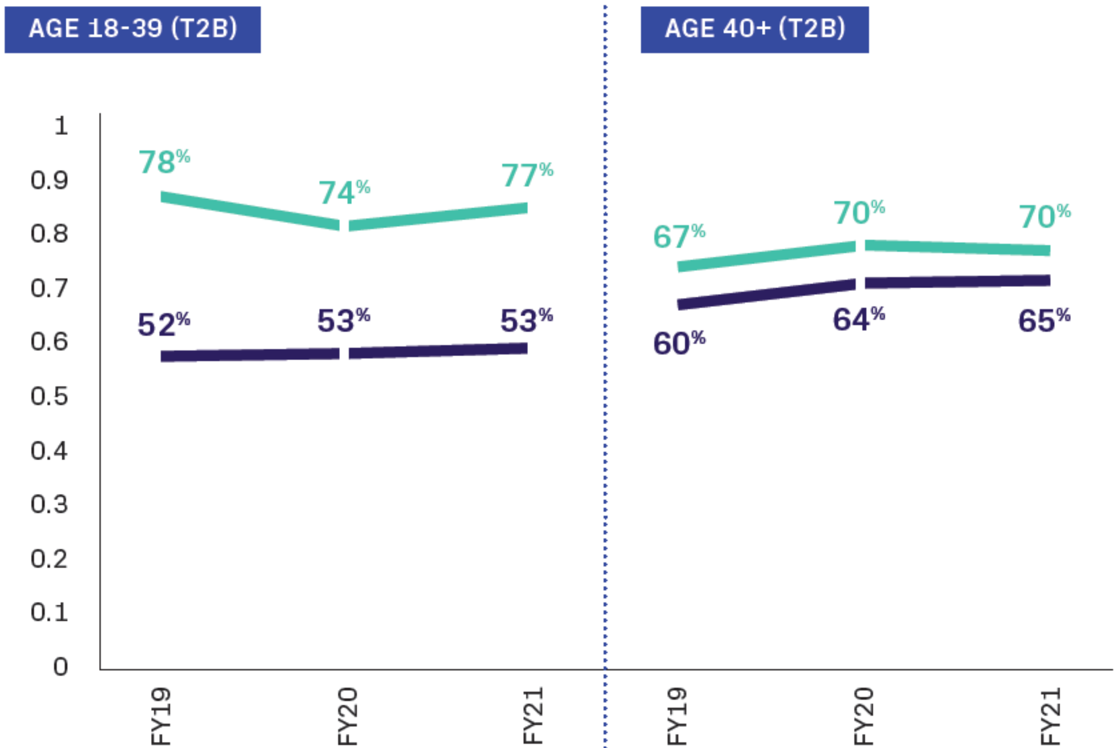
Alongside this stability, perceptions that taking action impacts quality of life is creeping up

CLIMATE BELIEFS – 'INDIVIDUAL' STATEMENTS (T2B)



CLIMATE_BELIEFS – How much do you agree or disagree that… – Not Stated REMOVED - NET T2B AGREE
Base: n = between 762 - 824

The gap to close between action and belief is much wider with younger New Zealanders



Younger New Zealanders show stronger potential – they're aware they could do more and are more open to making changes.

They're also significantly more likely to think taking action comes with a reduction in quality of life (47% vs. 33% among those aged 40 and over).

- I am prepared to change my own personal behaviour in order to reduce climate change
- I'm doing all I can to reduce my environmental impact

CLIMATE_BELIEFS – How much do you agree or disagree that… – Not Stated REMOVED - NET T2B AGREE
Base: FY19 (n= 184+); FY20 (n=1,174+); Fy21 (n=1,191+)

TRA

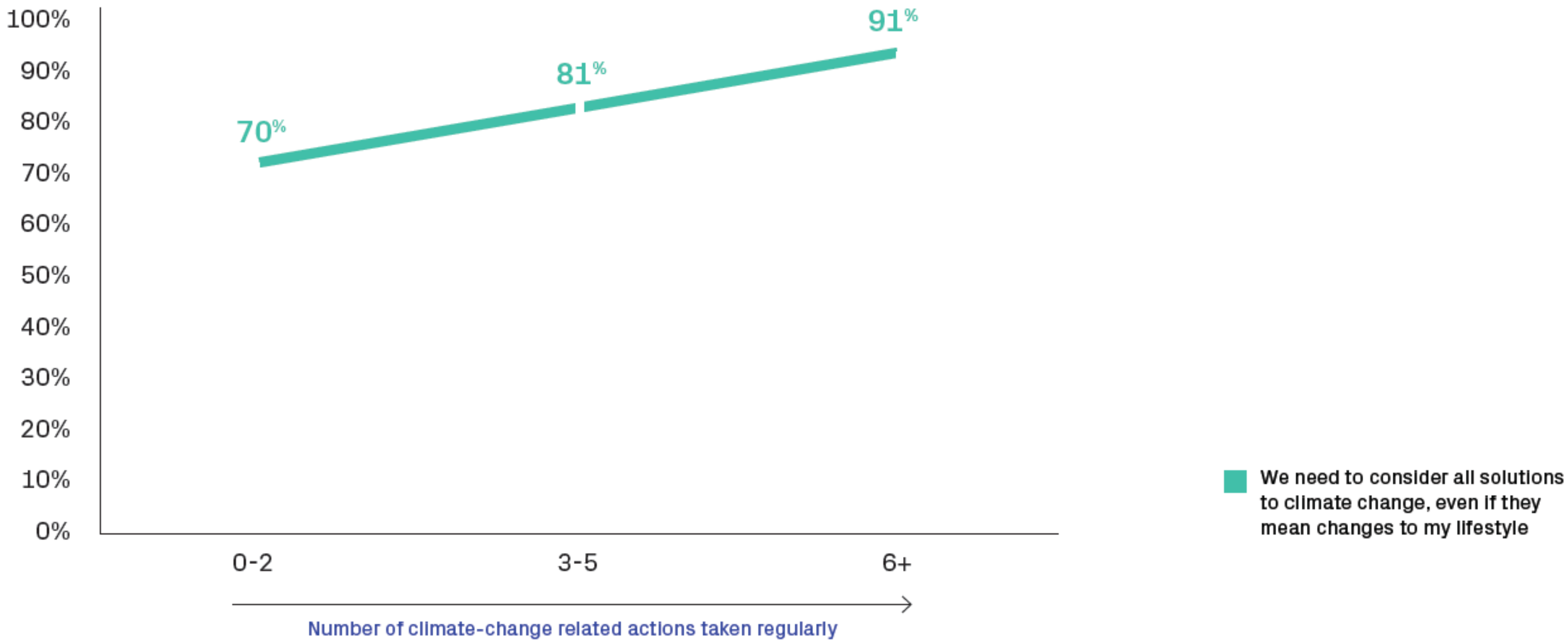
IMPLICATION

Return on investment is likely to be higher targeting younger New Zealanders. The core Gen Less message that taking action doesn't mean giving up the stuff they love is an important one to maintain.

But as we'll go on to see, cut through to this group has so far been harder to achieve.

The more we get people to act, the more they support all solutions to tackling climate change

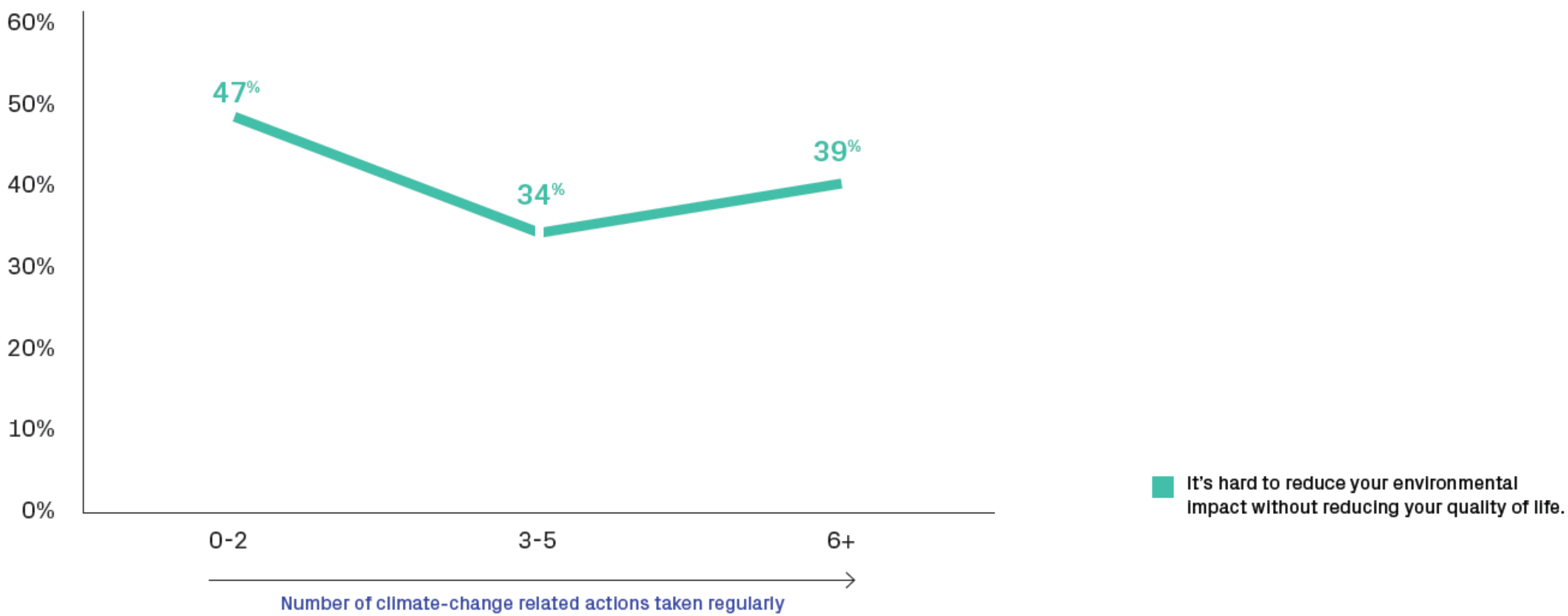
NO. OF ACTIONS TAKEN BY CLIMATE BELIEF (T2B, EXCLUDING CLIMATE CHANGE DENIERS)



CLIMATE_BELIEFS – How much do you agree or disagree that… – Not Stated REMOVED - NET T2B AGREE
Base: between n=121-281

And people taking more actions tend to be less likely to think this comes with a reduction in quality of life

NO. OF ACTIONS TAKEN BY CLIMATE BELIEF (T2B, EXCLUDING CLIMATE CHANGE DENIERS)



CLIMATE_BELIEFS – How much do you agree or disagree that... – Not Stated REMOVED - NET T2B AGREE
Base: between n=121-281

It's hard to 'skip the queue' when changing behaviour

THOSE DOING...

1-2 ACTIONS

68%

Choose to recycle. It is the clear starting point for climate action.

37%

Choose energy efficient lights. Another easy action to make with little impact on our day-to-day life.

3-5 ACTIONS

73%

Choose energy efficient appliances. It's another one-off cost with financial benefits in the long run.

62%

Reduce energy use at home. This involves more day-to-day choices, but they don't have to be huge.

3-5 ACTIONS

85%

Avoid the use of plastic. This involves making conscious decisions for most purchases, and so beliefs in the cause are usually strong.

65%

Drive less. People won't usually begin driving less unless they are already doing most other actions. For some driving less may make sense, but for others it could involve sacrificing time and effort.

CLIMATE_ACTIONS – Which of the following actions do you take in order to reduce your climate change impact? (T2B Take Regular Action)
Base: n = between 762 - 824

There's a clear pathway to get from small everyday changes to support for system-level transformation

THOSE DOING...

1-2 ACTIONS

68%

Choose to recycle. It is the clear starting point for climate action.

37%

Choose energy efficient lights. Another easy action to make with little impact on our day-to-day life.

3-5 ACTIONS

73%

Choose energy efficient appliances. It's another one-off cost with financial benefits in the long run.

62%

Reduce energy use at home. This involves more day-to-day choices, but they don't have to be huge.

3-5 ACTIONS

Strong support for system-level change when we get to this level of engagement

85%

Avoid the use of plastic. This involves making conscious decisions for most purchases, and so beliefs in the cause are usually strong.

65%

Drive less. People won't usually begin driving less unless they are already doing most other actions. For some driving less may make sense, but for others it could involve sacrificing time and effort.

CLIMATE_ACTIONS – Which of the following actions do you take in order to reduce your climate change impact? (T2B Take Regular Action)
Base: n = between 762 - 824

IMPLICATION

Even though system change is our end goal we still need to focus on individual actions.

And we need easy entry points – it's only when people are taking multiple actions that they're likely to do the actions that will have most impact and likely to support system-level change.

3

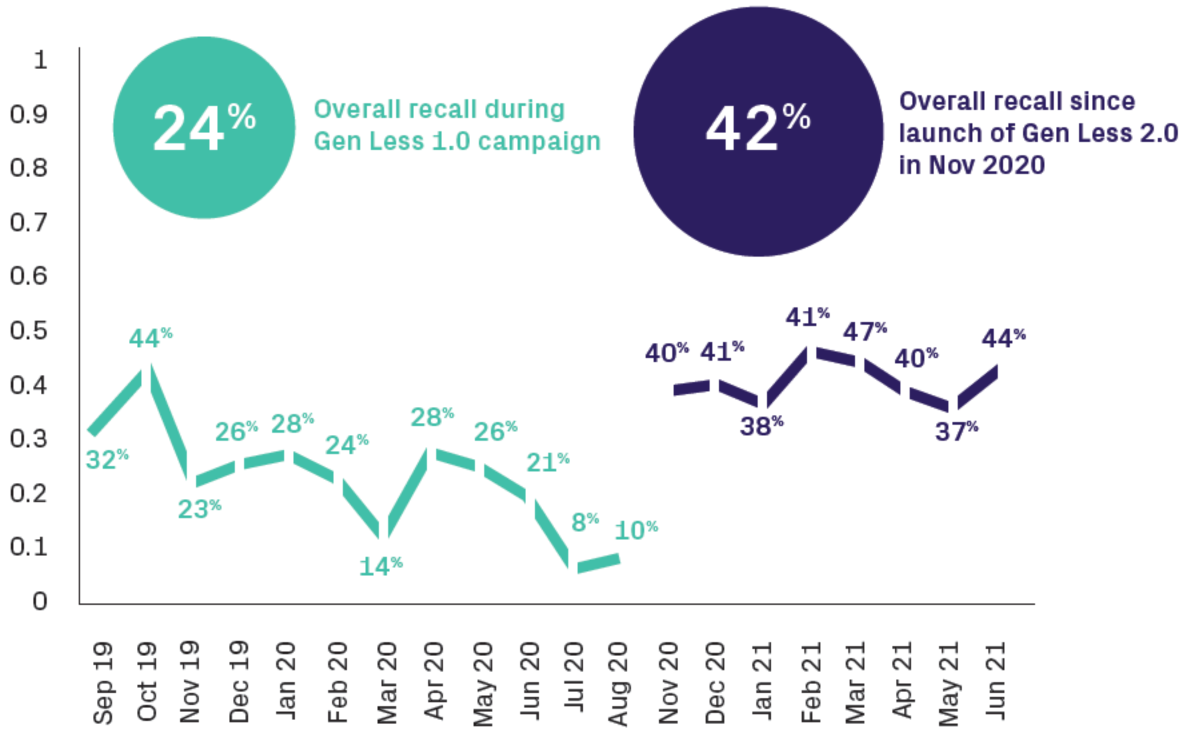
Gen Less 2.0

Campaign analysis

TRA

Gen Less

Always on has worked – high overall recall and more stability



Gen Less 2.0 resonated more strongly too, with likeability at 52% compared to 44% for Gen Less 1.0

Gen Less 2.0

Gen Less 1.0

Statistically significant difference

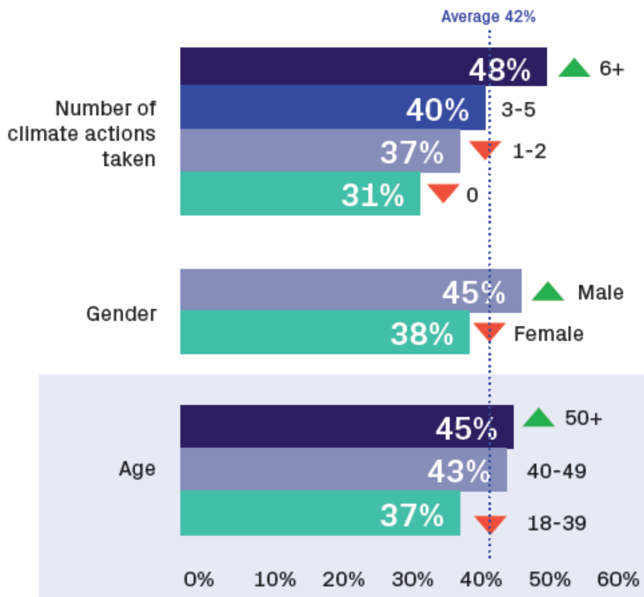
GENLESS_RECALL. Had you seen any of this material, or something similar?.
Base: n=127-1,050

TRA

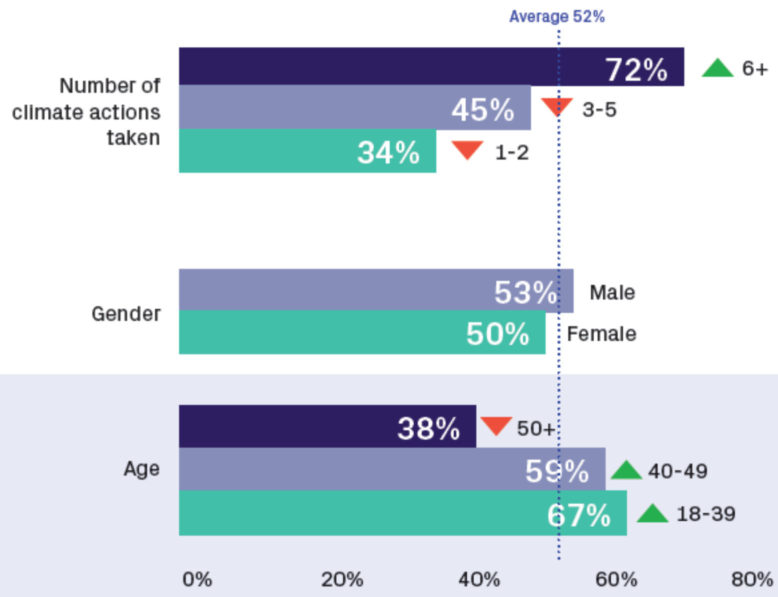
Gen Less

There are disparities in cut through across different groups – but these seem to be more about ‘opportunities to see’ than creative

RECALL AMONG DIFFERENT GROUPS



LIKEABILITY AMONG DIFFERENT GROUPS



Recall and likeability follow an inverse pattern for age: younger New Zealanders have less exposure but are more likely to like the campaign and see it as relevant to them.

▲▼ Statistically significant difference:

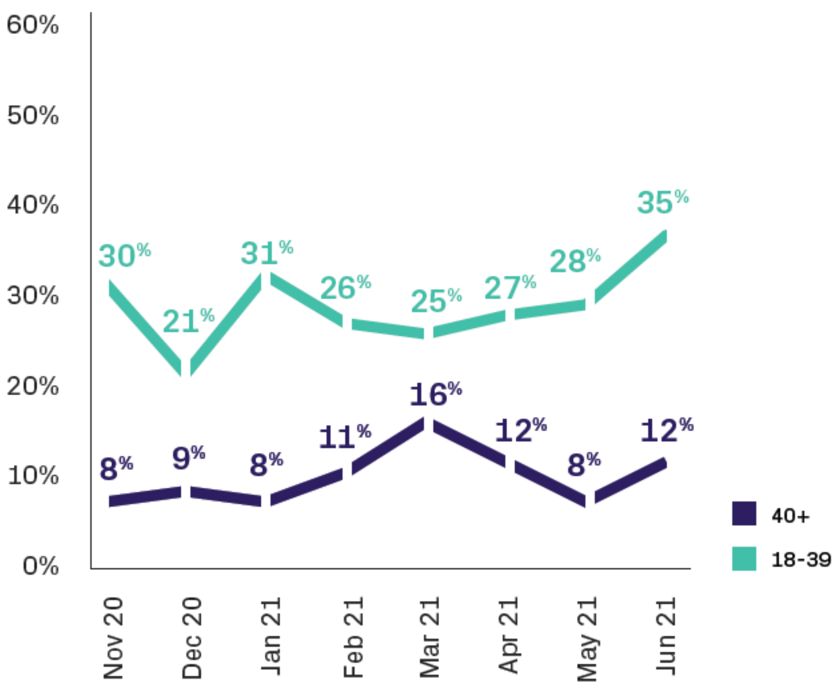
GENLESS_RECALL. Had you seen any of this material, or something similar?.
Base: n=127-1,050
GENLESS_LIKE. You answered earlier that you saw some of the images and/or the Gen Less campaign before today. How much do you like what you saw?
Base: n=107-596; Filter: Nov-20 – Jun-21 (Gen Less 2.0 length).

TRA

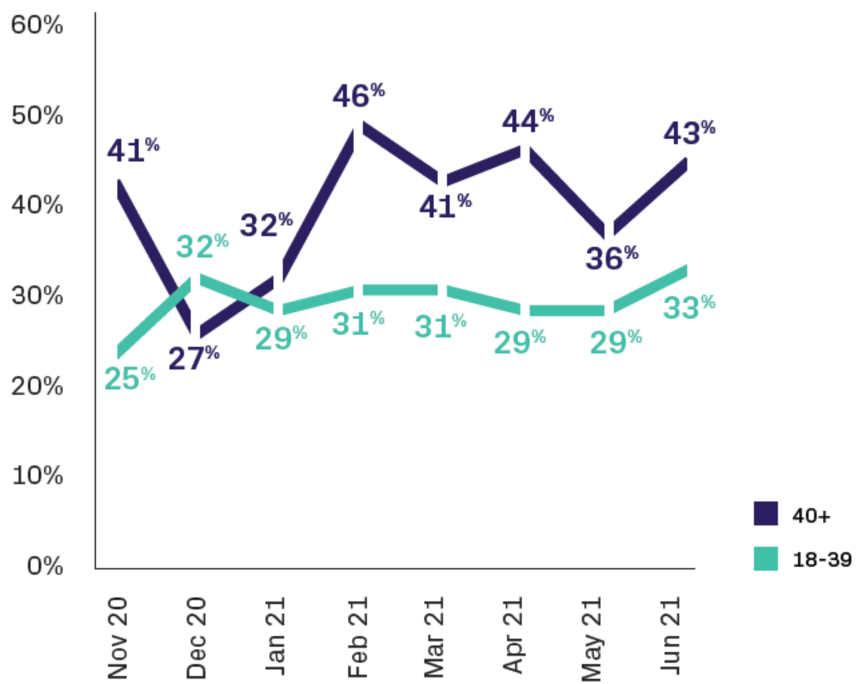
Recent extra spend on social has lifted reach among the under 40s

Gen Less

MONTHLY ONLINE CHANNEL RECALL BY AGE



MONTHLY OFFLINE CHANNEL RECALL BY AGE



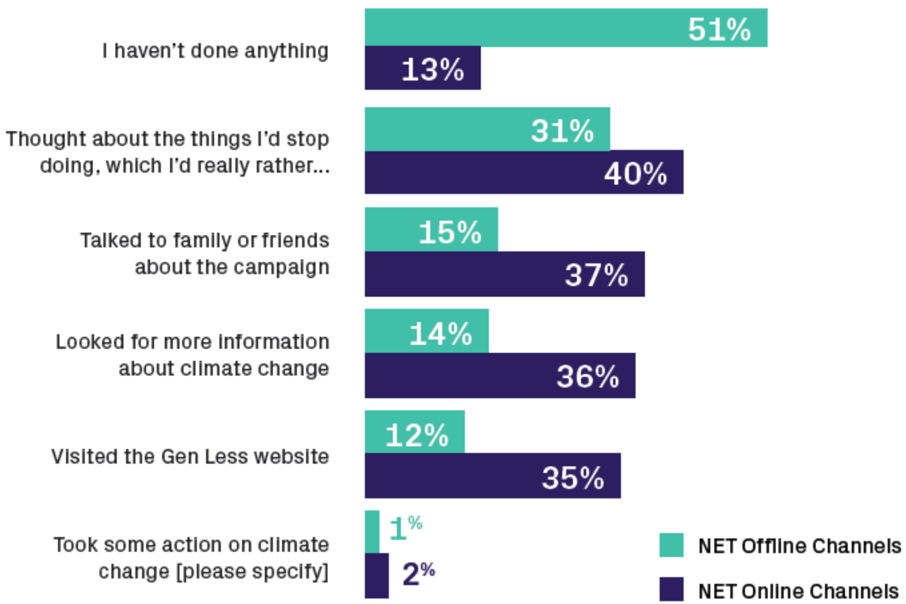
GENLESS_RECALL. Had you seen any of this material, or something similar?.
Base: n=97-170

TRA

Online can lead to specific actions, but offline is necessary for creating wide reach

Gen Less

ACTIONS TAKEN AS A RESULT OF SEEING CAMPAIGN BY CHANNEL



Those viewing the campaign through an online channel were significantly more likely to take subsequent action.

CHANNEL RECALL BY KEY GROUPS (SINCE GEN LESS 2.0 LAUNCHED)

	AGE		
	18-39	40-49	50+
Online	30% ▲	20%	7% ▼
Offline	30% ▼	37%	42% ▲

	SEGMENT				
	The Willing	The Busy	The Self Interested	The Complacent	The Unconvinced
Online	25% ▲	25% ▲	9% ▼	17%	15%
Offline	41%	35%	34%	42% ▲	30% ▼

Those viewing the campaign online are significantly more likely to be aged 18-39 or fall under the segments 'The Willing' or 'The Busy'.

Offline channels are more likely to reach those aged 50+ and those in 'The Complacent' segment.

GENLESS_ACTION As a result from seeing this advertising campaign, I ...;
GENLESS_CHANNELS: (Before today, in which places, if any, had you seen or heard about Gen Less?)
Base: n=107-596; Filter: Nov-20 – Jun-21 (Gen Less 2.0 length).

TRA

There's a disconnect between key outtakes and relevance, particularly among older New Zealanders

Gen Less

PROMPTED MESSAGE OUTTAKES

	Total	vs. Gen Less 1.0	AGE 18-39	AGE 40-49	AGE 50+
We can all make a difference to climate change in our own way	51%		45% ▼	45%	57% ▲
It's worth finding ways to use less energy	47%		45%	50%	47%
We can make a difference to climate change by giving up the stuff we don't love	45%		39% ▼	46%	49% ▲
We don't have to give up the stuff we love to make a difference to climate change	42%		42%	38%	44%
Using less energy can free you up	33%		38% ▲	35%	29% ▼
This campaign is relevant to me	28%	+3%	32% ▲	30%	24% ▼
This ad gave me something to think more deeply about	28%	+6%	34% ▲	33%	21% ▼

Those who are 50+ are strongly aligned to the collective 'we can' campaign messages, but struggle to see the personal relevance of the campaign.

▲▼ Statistically significant difference to average

GENLESS_PROMPT: Which of these statements do you agree with after seeing the advertising?
Base: n=107-596; Filter: Nov-20 – Jun-21 (Gen Less 2.0 length).

TRA

IMPLICATION

If you want to reach more younger people, then you need to over-invest in them for Gen Less 3.0.

Gen Less 2.0 is successfully reaching those on board with the cause, older New Zealanders and men in particular. But cut through is weaker with younger people and females. Amplifying activity on social media has paid off as a strategy to reach younger people in the short-term, and this can be built on.

Relevance is not yet felt across the board – in particular older New Zealanders don't feel the ad is aimed at them. Although younger people should be the strategic focus since they offer most opportunity, understanding how to create relevance with older, less climate-connected groups could be a stronger ambition of the next campaign.

EVs

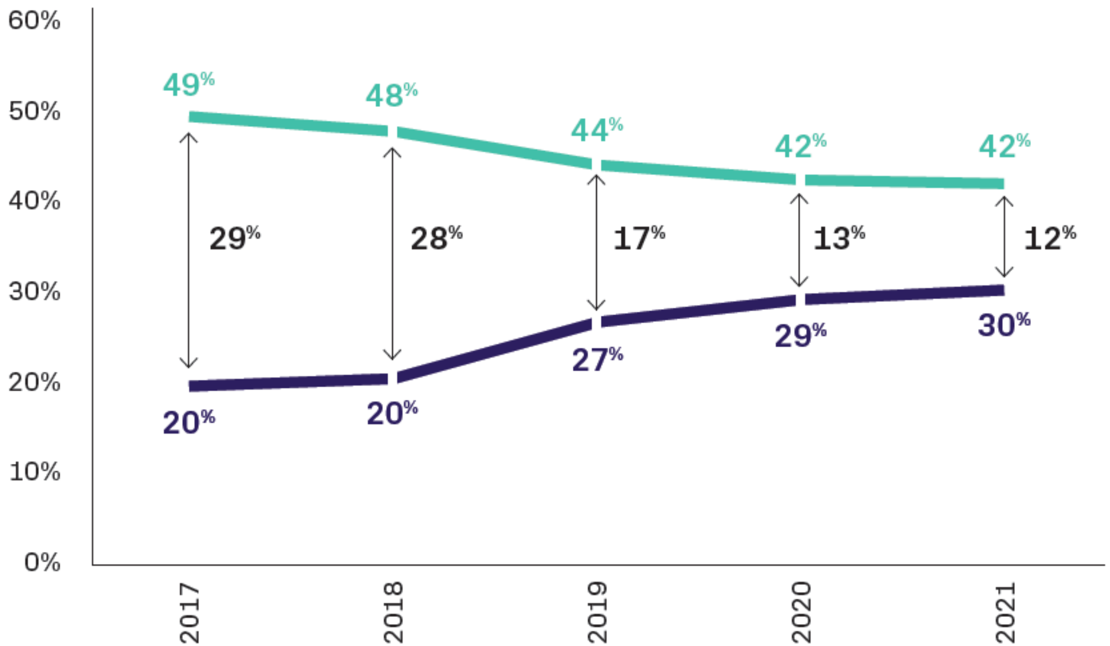
Key metrics and trends over time

4

TRA

The gap between perceived EV barriers and benefits continues to shrink

Transport



Younger New Zealanders and men are more likely to see benefits over barriers to EVs.

AGE		GENDER		ETHNICITY		
18-39	40+	Male	Female	NZ European	Māori/ Pasifika	Asian
30%▼	51%▲	41%	46%	46%▲	34%▼	31%▼
35%	25%▼	35%▲	22%▼	28%	30%	35%

Barriers outweigh benefits

Benefits outweigh barriers

▲▼ Statistically significant difference to average

EV13 Thinking about the benefits and barriers towards Electric Vehicles, please indicate how the benefits currently compare with the barriers for you personally on the scale below?
Base: Year (1,449 – 2,989); Demographics (n=83 – 492). Years represent calendar years, not financial years.

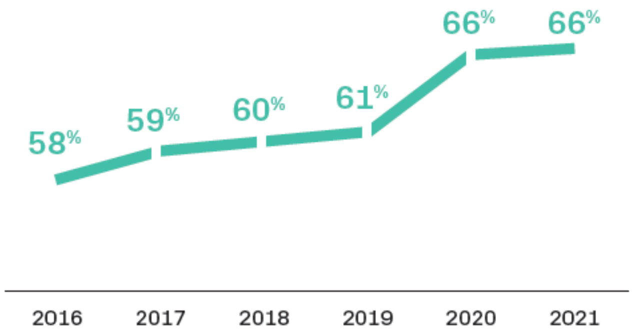
TRA

Key metrics around EVs stabilized for the first half of 2021, following sustained long-term growth

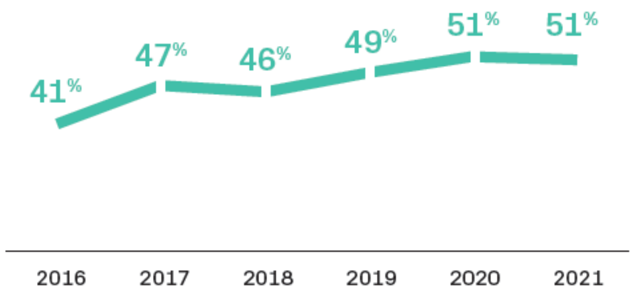
Transport

EV KEY METRICS – T2B

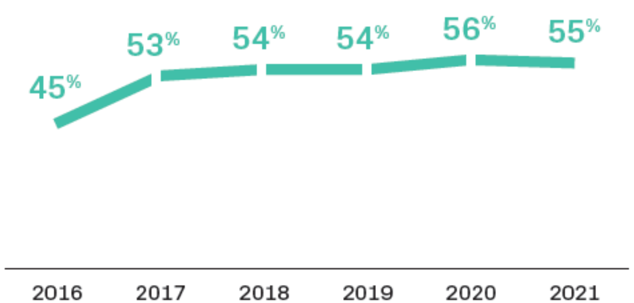
FAMILIARITY



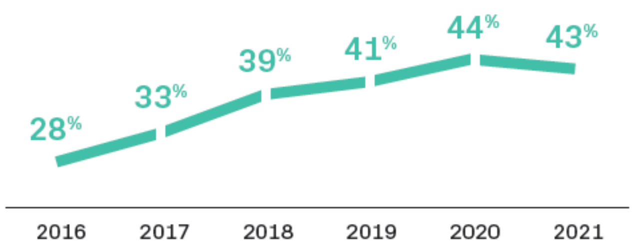
CONFIDENCE



FAVOURABILITY



BEV/PHEV CONSIDERATION



	Jul-Sep 20	Oct-Dec 20	Jan-Mar 20	Apr-Jun 20
Familiarity	64%	68%	68%	64%
Confidence	51%	52%	53%	49%
Favourability	55%	58%	58%	52%▼
Consideration	42%	45%	43%	42%

At a quarterly level, there was a significant decrease in favourability this quarter, while other measures saw slight, non-significant decreases.

The Clean Car Discount coming into force from July 2021 may impact these metrics in the months to come.

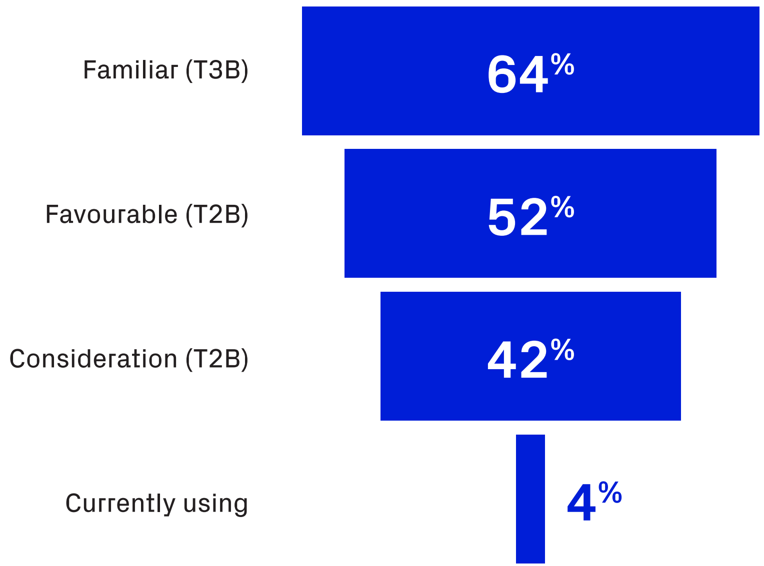
▲▼ Statistically significant difference to previous period

EV_FAMILIARITY How would you rate your familiarity with Electric Vehicles? / EV_FAVOUR How favourable or unfavourable is your overall opinion or impression of Electric Vehicles?
EV_CONFIDENCE To what extent are you confident that Electric Vehicles can meet your needs? EV_CONSr Thinking about your next vehicle purchase, how likely are you to consider the following vehicles?
Base: 3MR n=710+. Years represent calendar years, not financial years.

TRA

Younger people, men and those identifying as Asian show strong conversion down the EV funnel

EV CONVERSION FUNNEL – APR-JUN 21



	AGE		GENDER		ETHNICITY		
	18-39	40+	Male	Female	NZ European	Māori/ Pasifika	Asian
Familiar (T3B)	67%	63%	76% ▲	54% ▼	62% ▼	61%	83% ▲
Favourable (T2B)	58% ▲	48% ▼	59% ▲	45% ▼	52%	52%	59% ▲
Consideration (T2B)	51% ▲	37% ▼	50% ▲	35% ▼	39% ▼	47%	59% ▲
Currently using	5%	3%	4%	3%	3% ▼	2%	5%

▲▼ Statistically significant difference to average

EV_FAMILIARITY How would you rate your familiarity with Electric Vehicles? / EV_FAVOUR How favourable or unfavourable is your overall opinion or impression of Electric Vehicles? /
EV_CONSr Thinking about your next vehicle purchase, how likely are you to consider the following vehicles? / Q160c. What type of cars or other passenger vehicles (excluding motor bikes) do you currently own within your household?
Base: 3MR n= 83 - 527

TRA

After cheaper running costs, environmental benefits are strongly perceived

EV BENEFITS

EV benefit	%	Significantly higher for: Gender	Age	Region	Income	Ethnicity	Significantly lower for: Gender	Age	Region	Income	Ethnicity
They're cheaper to run	51%			Auckland (55%)	> $140k (63%)				Non-Akl. (48%)	< $60k (46%)	
They're cheaper to maintain	35%	Males (38%)		Auckland (43%)			Females (32%)		Non-Akl. (31%)	< $60k (46%)	
The produce less air pollution	49%			Wellington (61%)							
They save fuel resources	44%			Wellington (53%)	> $140k (55%)	NZ Euro. (47%)					
They produce fewer greenhouse emissions	40%					NZ Euro. (42%)					
They use renewable energy	38%	Males (41%)		Wellington (52%)			Females (35%)				
They can be charged at home	48%	Males (52%)					Females (44%)				
They can be charged independent of petrol companies	29%		Age 40+ (34%)			NZ Euro. (31%)		Age 18-39 (22%)		< $60k (25%)	
They are quiet when driving	31%	Male (35%)				Asian (38%)	Female (27%)				
They use an innovative technology	23%	Males (27%)	Age 18-39 (29%)	Auckland (29%)		Asian (31%)	Female (19%)	Age 40+ (19%)	Non Akl. (20%)		
They accelerate faster than petrol cars	11%	Male (14%)	Age 18-39 (15%)	Auckland (17%) Wellington (19%)	> $140k (24%)	Asian (22%)	Female (9%)	Age 40+ (9%)	Non-Akl. (9%)	< $60k (8%)	NZ European (10%)

Q178. What is it about electric vehicles that would make you likely to consider them the next time you buy a vehicle?
Base: n=710

Performance | Charging | Environment | Cost

TRA

Initial cost is a universal barrier, regardless of income

EV BARRIERS

EV barrier	%	Significantly higher for: Gender	Age	Region	Income	Ethnicity	Significantly lower for: Gender	Age	Region	Income	Ethnicity
They are not available at an affordable price	58%		40+ (62%)	RONI (64%)		NZ Euro. (60%)		18-39 (52%)	ROSI (47%)		Māori/Pasifika (43%)
Uncertainty about the battery life and replacement	50%	Female (54%)	40+ (56%)	RONI (57%)		NZ Euro. (52%)	Male (46%)	18-39 (40%)	Auckland (39%)		Māori/Pasifika (40%), Asian (43%)
I don't know enough about them to consider them	28%	Female (36%)	40+ (31%)		<$60k (35%)		Male (20%)	18-39 (23%)	Auckland (21%)	>$140k (18%)	Asian (17%)
They are not tried & trusted yet	24%					NZ Euro. (27%)				>$140k (13%)	Asian (17%)
Im unsure about their environmental benefits	16%		40+ (18%)					18-39 (13%)	Wellington (10%)		Asian (11%)
They have a driving range that is not suitable for long distance travelling	38%		40+ (44%)			NZ Euro. (41%)		18-39 (28%)	Auckland (32%)		Māori/Pasifika (25%), Asian (27%)
Public charging stations are not easy to find	35%								RONI (30%)		
It takes a long time to charge them	32%										
They are difficult to service	18%		18-39 (24%)					40+ (14%)		<$60k (12%)	
They dont perform as well as petrol cars	15%	Female (19%)					Male (13%)		Auckland (12%)		
They have a driving range that is not suitable for my typical day-to-day needs	15%		40+ (17%)					18-39 (12%)	Wellington (9%)		
There is not a wide range of body types/ models available	18%									<$60k (15%)	
They are not easily found for purchase	13%		18-39 (16%)	Wellington (20%)	<$60k (16%)			40+ (11%)			
There isn't the vehicle type to meet my needs	11%		40+ (13%)		>$140k (23%)			18-39 (9%)		<$60k (9%)	
They are odd looking	11%		18-39 (17%)					40+ (8%)	ROSI (5%)		

Q179. What is it about electric vehicles that would make you unlikely to consider them the next time you buy a vehicle?
Base: n=710

Looks/Aesthetics · Range/Availability · Performance · Uncertainty · Price

TRA

New Zealanders are gradually pivoting towards EVs

IMPLICATION

It's still early days in terms of uptake, but EVs are becoming a more serious proposition for New Zealanders.

Men, under 40s and those identifying as Asian form the early adopter group. Other segments of the population will take more convincing, in particular older females. Targeted messaging that's crafted to dispel specific barriers held by different groups will help shift mindsets to be more accepting of EVs.

Let's talk

tra.co.nz hello@tra.co.nz +64 9 377 8129

TRA

Appendix Six: Gen Less 3.0 Interim Results

EECA
TE TARI TIAKI PŪNGAO
ENERGY EFFICIENCY & CONSERVATION AUTHORITY

Gen Less 3.0
Interim Campaign Read

December 2021

TRA

Measurement of campaign effectiveness

Following the launch of Gen Less 3.0 in mid October, questions exploring response were included in both the November business monitor and November and December consumer monitor.

During this period of fieldwork, Auckland was in Alert Level 3, Northland and Waikato in Level 2/3, and the rest of New Zealand in Level 2.

What we measure:

Comprehension of the campaign

- Recall of the campaign – have people seen it?
- Message outtakes – is it conveying the relevant message?
- Likability – important for message stickiness.
- Actions taken as a result – are we building towards changing beliefs such as ‘my actions make a difference’?

Short and long term behaviour change

- New Zealanders’ willingness to participate in change.
- New Zealanders’ level of comfort with institution-led system change.

Who we talked to:

- Via EECA’s ***Consumer Monitor*** – 250 New Zealanders aged 18+ per month - representative of New Zealand across age, gender and region.
- The data in this report is taken from Nov – Dec 2021, with a total base of 528, and 141 ad recognisers.

- Via EECA’s ***Business Monitor*** – every 6 months around 500 business decision makers take part in this study.
- The data in this report is taken from Nov 2021, with a total base of 514, and 208 ad recognisers.

This study is conducted by TRA. TRA is an insight agency that combines understanding of human behaviour with intelligent data capability to help clients navigate uncertainty and answer complex problems.

TRA

Background

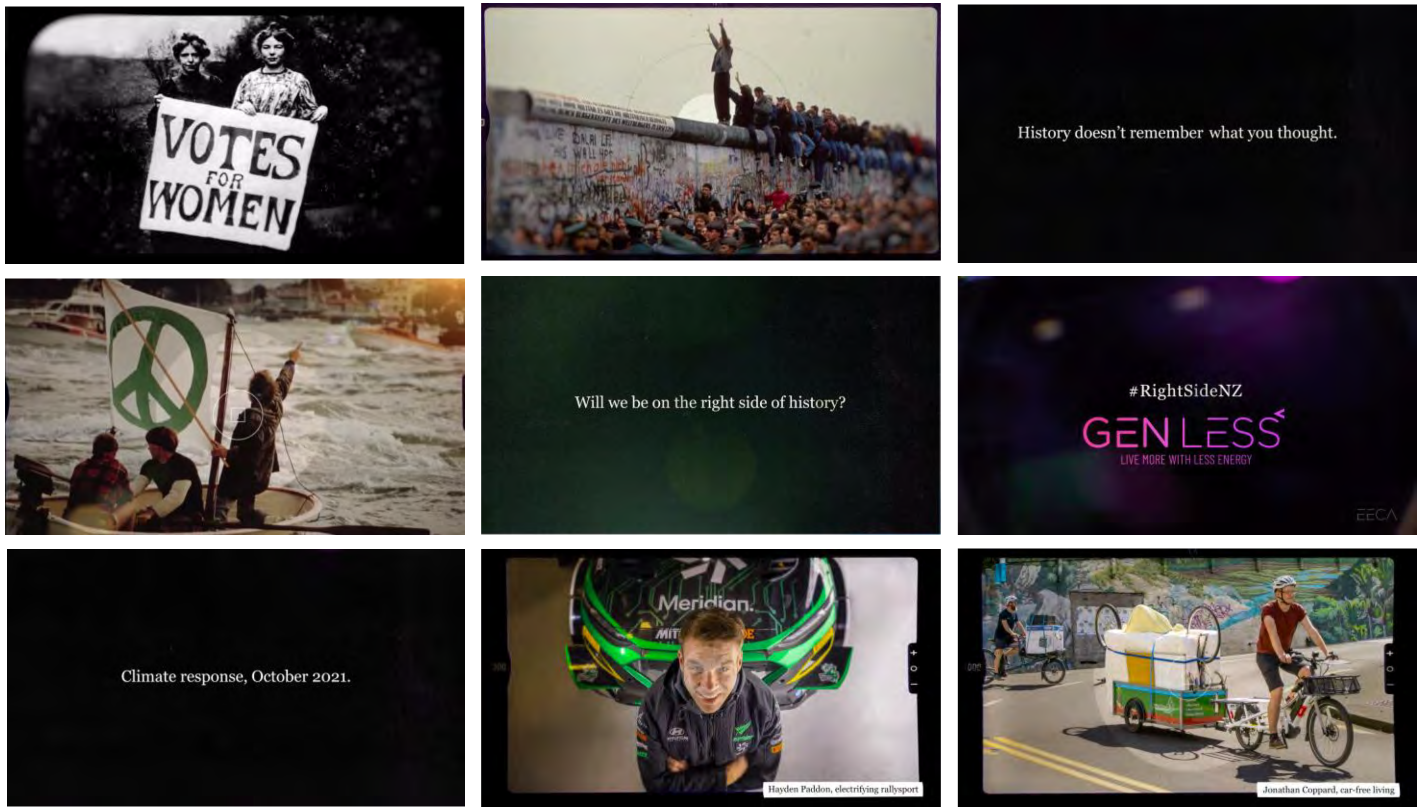
The objective of the Gen Less campaign is to emotionally engage and inspire all New Zealanders so they:

- Are open to change
- Demand change
- And take action in ways that have the greatest impact on our carbon emissions.

We know 80% of New Zealanders believe in climate change, however only 40% are taking action.

This campaign is designed to address complacency, showing that everyone has a part to play by asking the question “will you be on the right side of history?”

Gen Less 3.0: stimulus seen by respondents



Question: *Before today, had you seen any of this material, or something similar?*

Background

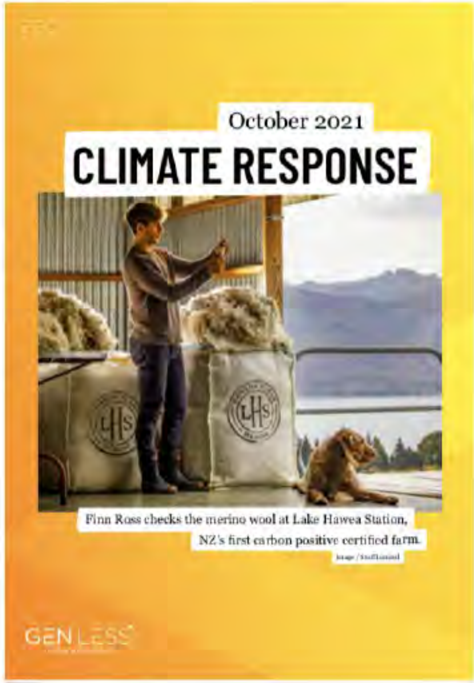
There are two 'sides' to the campaign –

1. Challenge - encourages New Zealanders to think about how they will contribute to climate change history

2. Response - shows New Zealanders how businesses, everyday Kiwis and communities are already taking climate change action.

The campaign launched (17 Oct 2021, coinciding with COP26), with the first two weeks of media solely on Challenge. The Response creative started two weeks later (31 Oct).

Over this research period, 80% of the media budget was spent on Challenge and 20% on Response. Consequently, these results reflect the fact that most people will only have had the opportunity to see the Challenge creative. As the campaign progresses, the media spend shifts in favour of Response.



Timeline

OCT 17th

Launch of “Challenge”

OCT 31st – NOV 12th

The COP 26 UN Climate Change Conference took place in the UK, attended by New Zealand’s climate change minister James Shaw.

Consumer Monitor November fieldwork: 11th – 26th

Consumer Monitor December fieldwork: 1st – 8th

Business Monitor November fieldwork: 12th – 22nd

OCT 31st

Launch of “Response”

Market context

Communications are designed to respond to contextual factors – these factors informed the Gen Less communications brief to emotionally challenge New Zealanders from their sense of complacency towards climate change action.

Equally communications are received within a particular context. So it is worth stating the contextual factors surrounding response to the campaign in November and early December and how they may have affected New Zealanders and businesses.

Firstly, the uncertainty surrounding the continuing impacts of COVID-19 and the Delta outbreak. Auckland began to move out of restrictions towards the new traffic light framework, but in all regions we have seen the impact of COVID-19 on mental health, economic concerns, and uncertainty about the future[1]. While New Zealand has achieved a 90% vaccination rate, there has also been significant media attention around the divisiveness and protests towards vaccine mandates[2].

Worldwide, and in New Zealand, COVID-19 and economic stimulus have resulted in a K-shaped recovery – where some households/businesses increase wealth and others deteriorate significantly.[3]

From a business point of view this can result in polarization of response to other social or regulatory messages that may impact them – climate change being one of these[4].

1. https://covid19.govt.nz/news-and-data/latest-news/new-research-provides-insights-into-public-sentiment-during-delta-outbreak/
2. https://www.rnz.co.nz/news/political/455314/protests-represent-a-small-minority-politicians-say
3. https://www.newsroom.co.nz/nzs-k-shaped-covid-19-recovery
4. EECA Business monitor December 2021

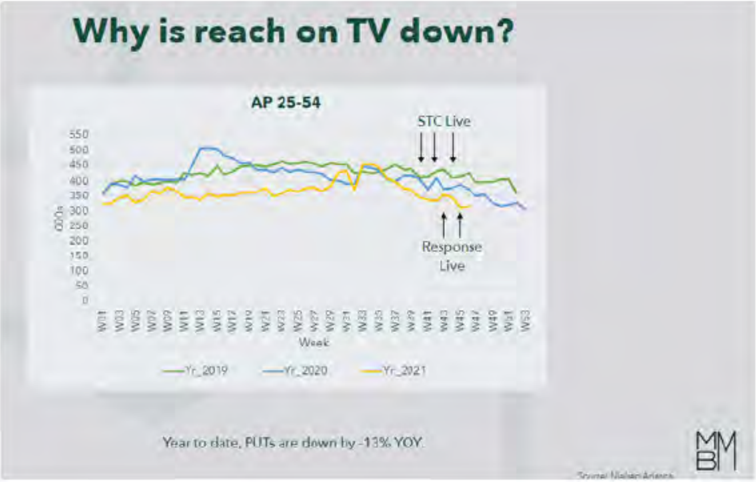
TRA

Market context

From a household point of view, we know that uncertainty, changes to working, schooling and socialising and financial environments also create pressure on people. This can result in decreased 'headspace' to take on messages outside of immediate or day-to-day needs.

Within this, COP 26 received reasonable media coverage, with 1,000 mentions in media in the first week of October. Sentiment towards the coverage was also broadly positive (around 50% positivity).[1]

Beyond the impacts of COVID-19, there are long and short term changes within the media environment. Television reach has lessened over the past 3 years. 2021 viewership behavior saw an increase up until August, followed by a significant deterioration from September through December. This impacts of the power of television to drive recall.



1. EECA Zavy Radar – search term 'COP26'.

Summary of first month in market

This campaign requires both Challenge and Response creatives to be embedded. For this dip, the Response creative was only in market for two weeks – so results should be interpreted with this in mind.

We have seen a differing in response from businesses and households: high recall from businesses but a polarising response. Consumers had lower recall, but a more receptive response

Key findings for consumers:

- Awareness of Gen Less brand is seeing steady upward growth – rising quarter-on-quarter over the last 18 months.
- There was lower recall for the new Gen Less campaign compared to previous launch months for Gen Less 1.0 and 2.0.
- Likability among consumers was similar to previous campaigns.
- Compared to Gen Less 2.0, take-away messages are harder for people to discern – and more in line with Gen Less 1.0.
- But campaign-related action is holding steady – Gen Less 3.0 appears to be having a similar level of impact as Gen Less 2.0 in terms of people taking action after seeing the campaign. It's also successfully reaching a receptive audience who are engaged with the climate cause.

Key findings for business:

- Like consumers, business awareness of Gen Less is growing steadily – this rose significantly from 21% in May 2021 to 38% in November 2021.
- Recall for the new campaign among businesses was high and comparable with previous launches.
- However, likability among business saw a significant decrease.
- Businesses were less likely to identify a key message take-out than consumers, but campaign-related action also largely held steady compared to the previous campaign.

TRA

Summary table of key campaign metrics

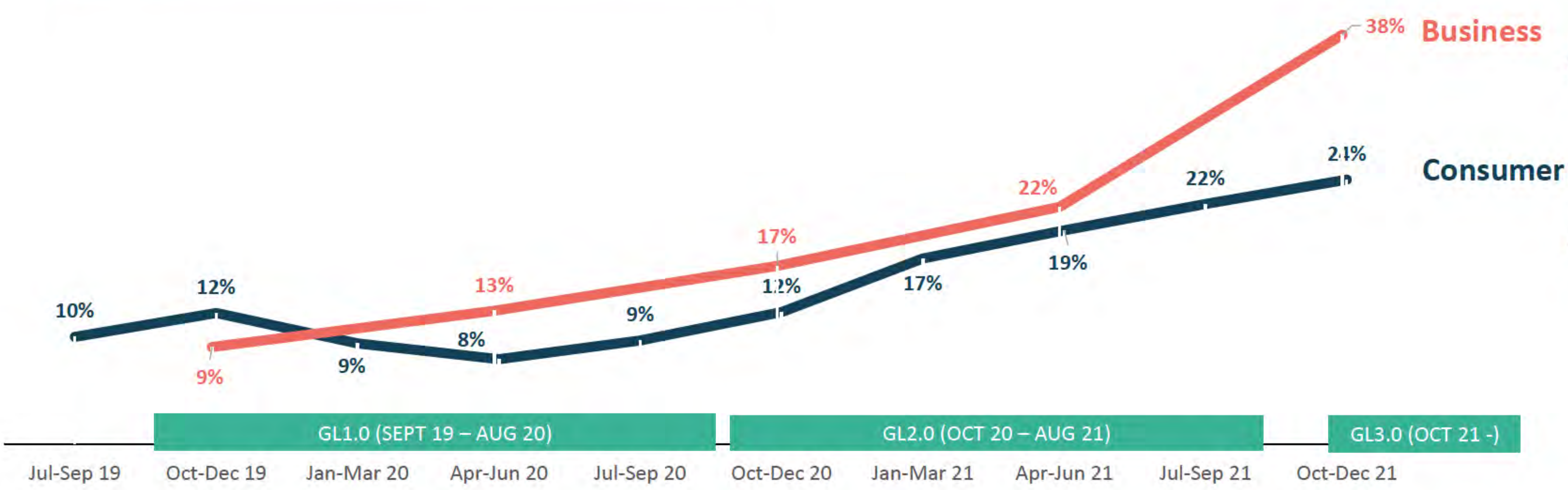
Summary of campaign performance for Gen Less 3.0

		Consumer	Business
	Recall (first month)	27%	44%
	Likability	48%	38%
	Really / somewhat easy to remember ad is from Gen Less	70%	59%
Prompted Message Outtakes (key comparable options shown)	Gave me something to think more deeply about climate change	20%	18%
	Relevant to me	20%	23%
	None of these (out of 10 options)	19%	29%

***Base**: Consumer (Total base n=528, ad recognisers n=141); Business (total base n=514, ad recognisers n=208).*

Brand awareness of Gen Less continues a steady climb

Quarterly awareness of brand: Consumer Monitor & Business Monitor



GENLESS_BRAND_AWARENESS. *Which of the following have you heard of? Which of the following logos have you seen before?*
Base: *Consumer Monitor monthly sample circa n=250, Business 6-monthly dip circa n=500*

TRA

Recall and likability

Consumer campaign recall is lower than previous campaigns

Gen Less – Campaign Recall

Month 1 Gen Less 1.0	Month 1 Gen Less 2.0	Month 1* Gen Less 3.0	Target FY21 (3MR)
44%	40%	27%	43-48%

Around three-quarters of recall came from the TVC and one-quarter from social

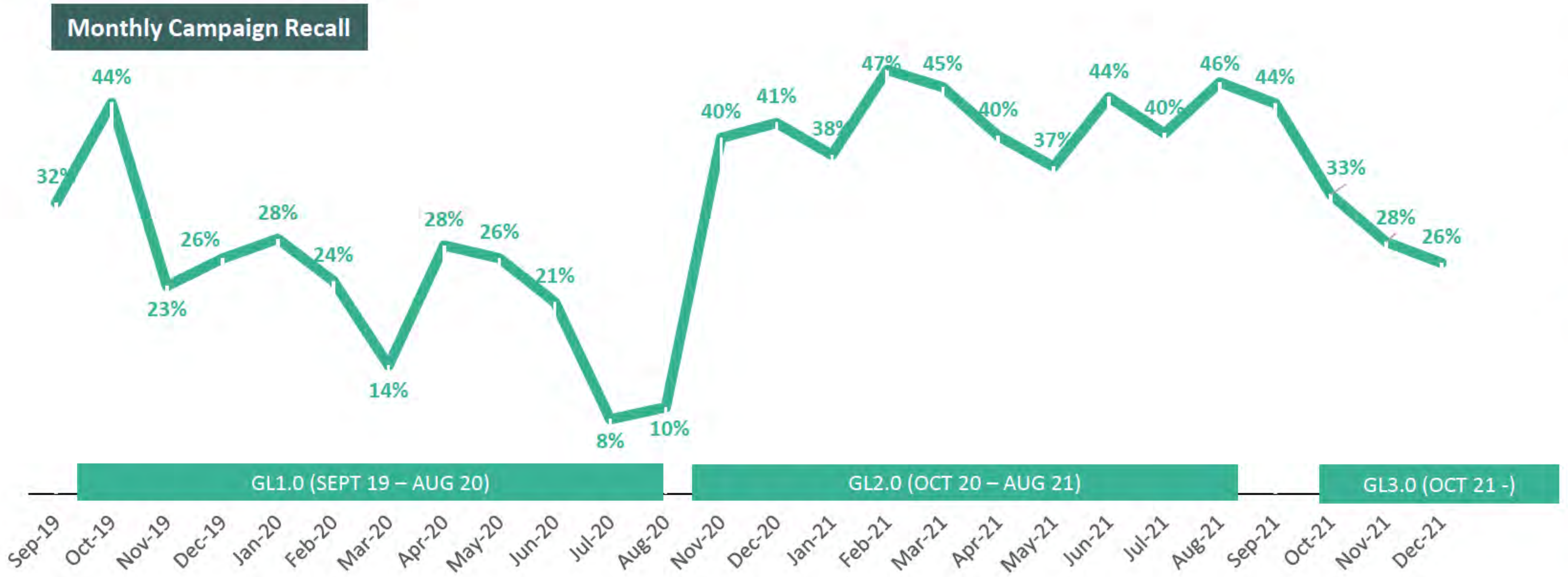
GENLESS_RECALL. *Had you seen any of this material, or something similar?.* ***GENLESS CHANNELS*** *Before today, in which places, if any, had you seen or heard about Gen Less?*

**Sample taken from condensed sample in November and December 2021*

Base: *Gen Less 3.0 n=528, Gen Less 2.0 n=273, Gen Less 1.0 n=122*

TRA

Initial monthly recall is lower than for previous campaign launches



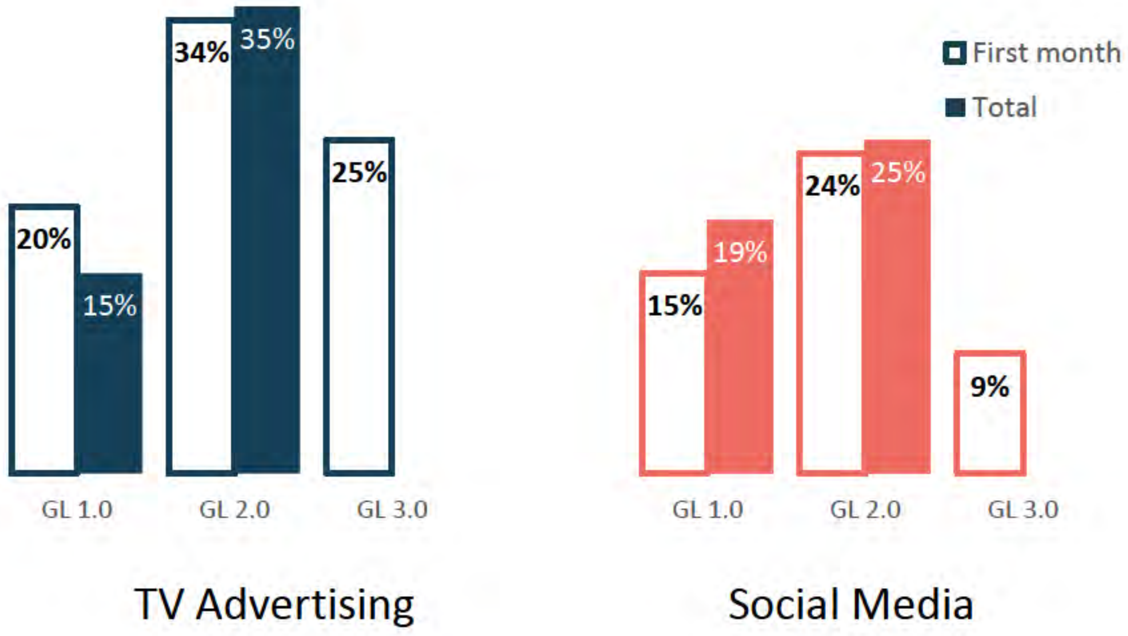
GENLESS_RECALL. *Had you seen any of this material, or something similar?.* ***GENLESS CHANNELS*** *Before today, in which places, if any, had you seen or heard about Gen Less?*

Base: *monthly sample circa n=250*

TRA

Our focus on upweighting social media and down-weighting TV advertising is apparent in channel recall

Gen Less 3.0 – campaign recall by channel



We also know that, year to date, TV viewership was down 13% among 25-54s – which adds context to the fall in TV recall, and lower overall cut-through.

(MBM December 2021 report, recap of the first two months)

GENLESS_RECALL. Had you seen any of this material, or something similar?.
Base: *Gen Less 3.0 n=528, Gen Less 2.0 n=3,085, Gen Less 1.0 n=2,526.*

TRA

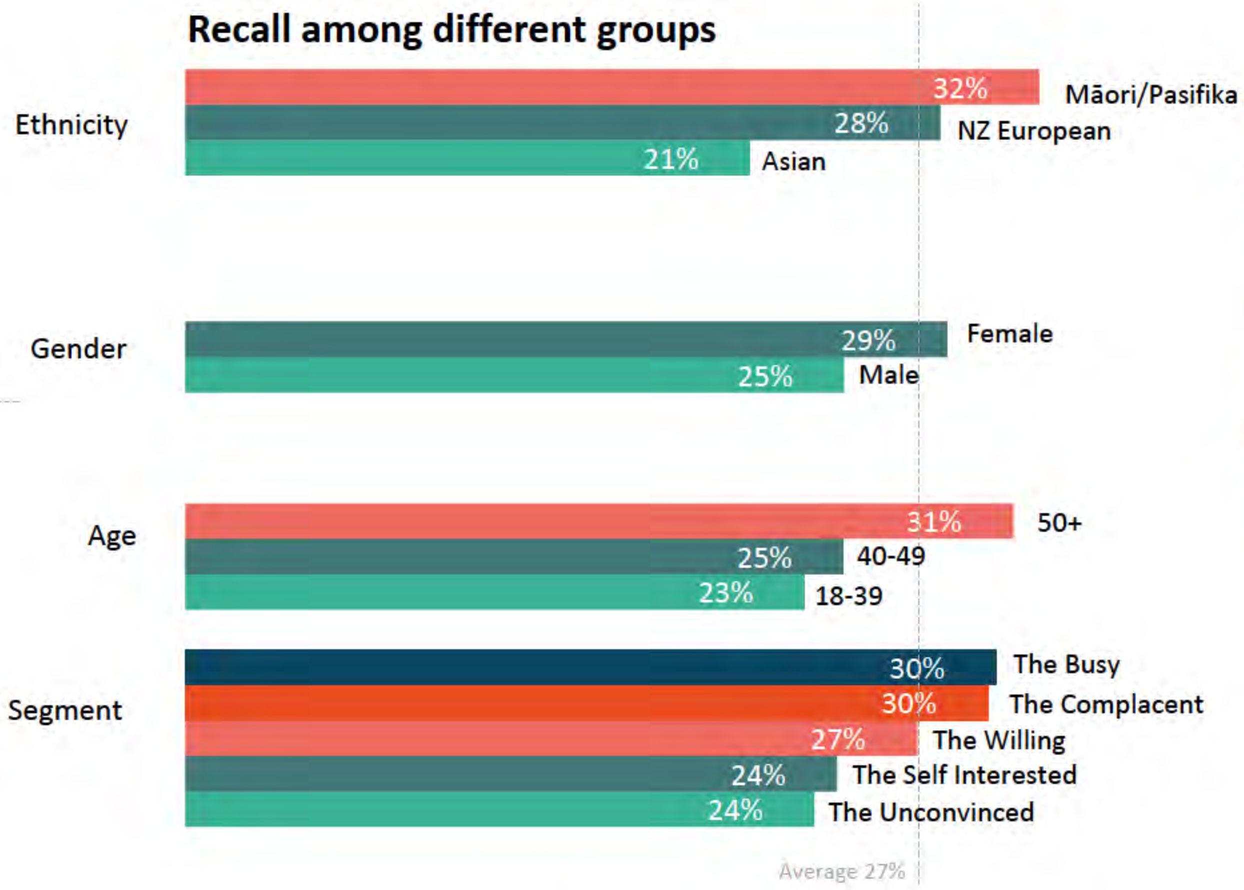
Campaign recall is similar across different consumer groups

Gen Less 3.0 – Campaign Recall

Total

27%

There are no statistically significant differences in recall by core demographics



GENLESS_RECALL. Had you seen any of this material, or something similar?. ***Base:*** Māori/Pasifika n=64, NZ European n=366, Asian n=85, female n= 279, male n=246, *aged 50+ n=229, aged 40-49 n=102, aged 18-39 n=197, The Busy n=115, The Complacent n=112, The Willing n=89, The Self-Interested n=128, The Unconvinced n=61*

Significantly higher/lower than average

Recall is largely consistent across different demographic groups

Gen Less – Campaign Recall

	Ethnicity			Gender		Age			Segment				
	Māori / Pasifika	NZ European	Asian	Female	Male	18-39	40-49	50+	The Busy	The Complac ent	The Willing	The Self-Intereste d	The Unconvin ced
Gen Less 2.0 (first month)	39%	39%	37%	36%	43%	32%	56%	40%	53%	42%	37%	34%	25%
Gen Less 2.0 (total)	45%	43%	34% ▼	38%	45%	35% ▼	42%	47% ▲	44%	46% ▲	45%	36% ▼	36% ▼
Gen Less 3.0	32%	28%	21%	29%	25%	23%	25%	31%	30%	30%	27%	24%	24%

GENLESS_RECALL. Had you seen any of this material, or something similar?. ***Base:*** *Gen Less 3.0:* Māori/Pasifika n=64, NZ European n=366, Asian n=85, female n= 279, male n=246, *aged 50+ n=229, aged 40-49 n=102, aged 18-39 n=197, The Busy n=115, The Complacent n=112, The Willing n=89, The Self-Interested n=128, The Unconvinced n=61*

▲▼ Significantly higher/lower than average

TRA

Recall among businesses is higher than for previous campaigns

Gen Less – Campaign Recall

Month 1 Gen Less 1.0	Month 1 Gen Less 2.0	Month 1* Gen Less 3.0	Target FY21 (3MR)
25%	37%	44%	43-48%

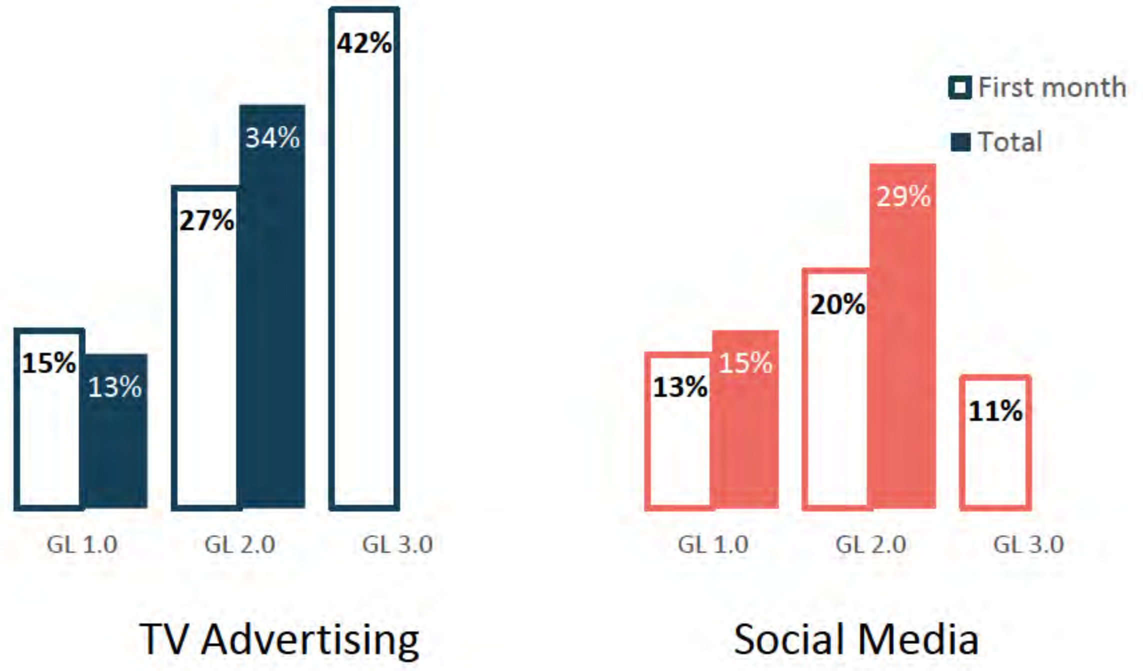
GENLESS_RECALL. *Had you seen any of this material, or something similar?.* ***GENLESS CHANNELS*** *Before today, in which places, if any, had you seen or heard about Gen Less?*
Base*: Gen Less 3.0 / Nov 2021 n=528, Gen Less 2.0 / Nov 2020 n=501, Gen Less 1.0 / Nov 2019 n=515*

TRA

Business

Again, the upweighting of TV advertising is seen, exceeding channel recall of Gen Less 1.0 and 2.0

Gen Less 3.0 – campaign recall by channel



GENLESS_RECALL. Had you seen any of this material, or something similar?
***Base:** Gen Less 3.0 n=514, Gen Less 2.0 n=1,124, Gen Less 1.0 n=1,015*

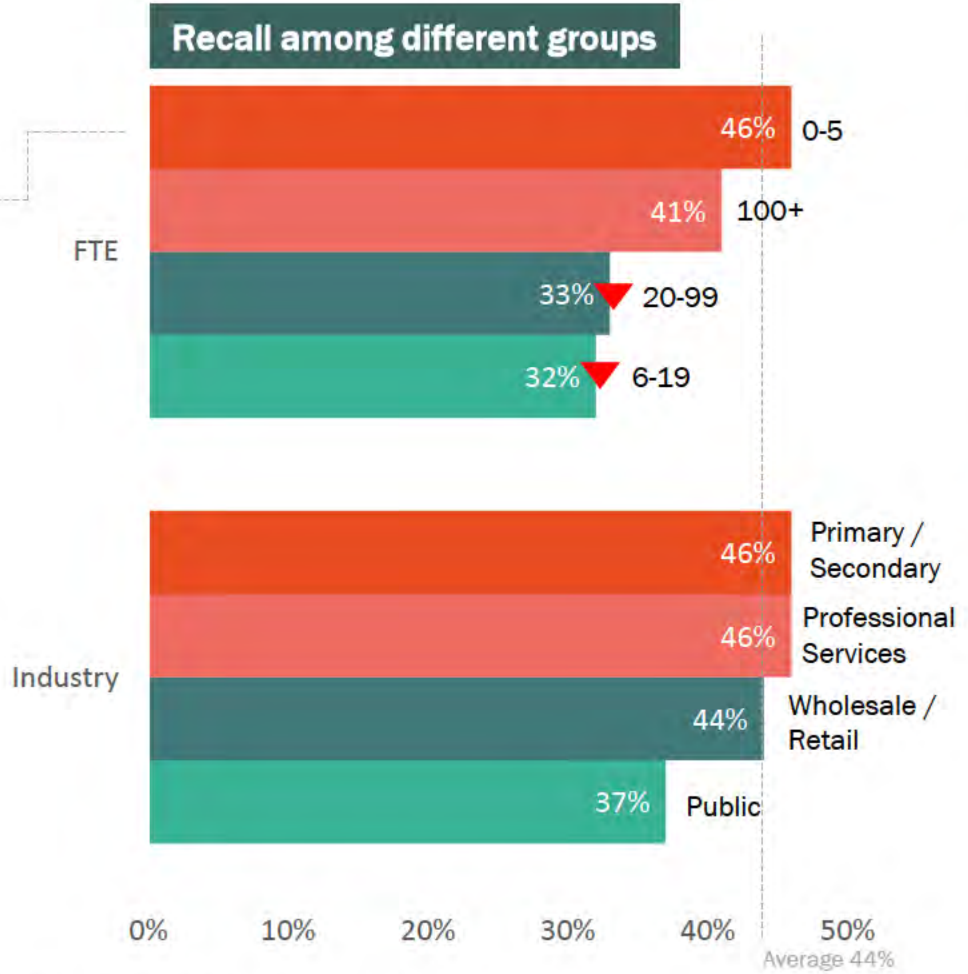
TRA

The campaign is successfully reaching a broad cross-section of industries

Gen Less 3.0 recall

44%

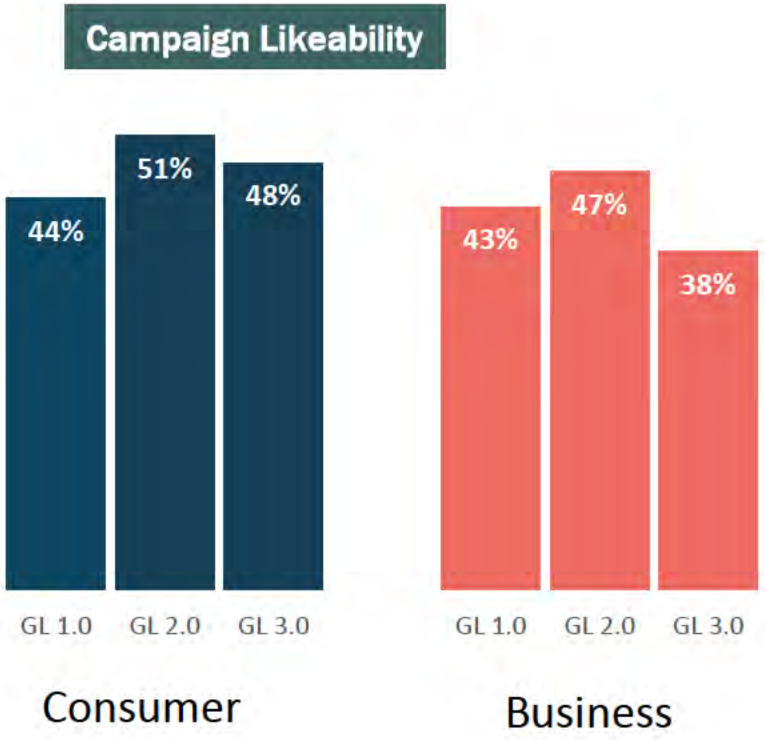
Businesses with 0-5 full-time employees recall the ad the most – which is good as they are the majority of NZ businesses



*GENLESS_RECALL. Had you seen any of this material, or something similar?. **Base:** all businesses n=514, 0-5 FTE n=243, 6-19 FTE n=109, 20-99 FTE n=109, 100+ FTE n=53, Primary / Secondary n=166, Wholesale / Retail n=108, Professional services n=107, Public n=63*

Statistically significant difference:

GL3.0 has higher likeability among consumers



Likeability for consumers sits somewhere in between Gen Less 1 and 2, but for business, it's lower than previous campaigns. A fall in likeability with the new campaign is to be expected: Gen Less 3.0 is designed to be more provocative (not necessarily likeable, which was more of a focus for Gen Less 2.0), so downward shifts are not surprising.

There are some consumer groups significantly more likely than others to like the campaign:

- Younger consumers: those aged under 50 (61%) show significantly higher likeability than those 50 and over (34%)
- Women are more likely to like the campaign than men (54% vs. 39%) – in contrast to Gen Less 2 where men consistently showed stronger likeability
- And higher earners show stronger likeability than lower earners (62% among those with a household income of $100 - $140k, 39% among those earning less than $60k).
- Likeability is around average for The Willing, Self-Interested and Complacent but particularly high for The Busy (70%) and low for The Unconvinced (7%).

For consumers, likeability was slightly higher in November (53%) when there was a stronger weighting of the campaign towards Challenge – compared to December (43%) when there was more emphasis on the Response element of the campaign.

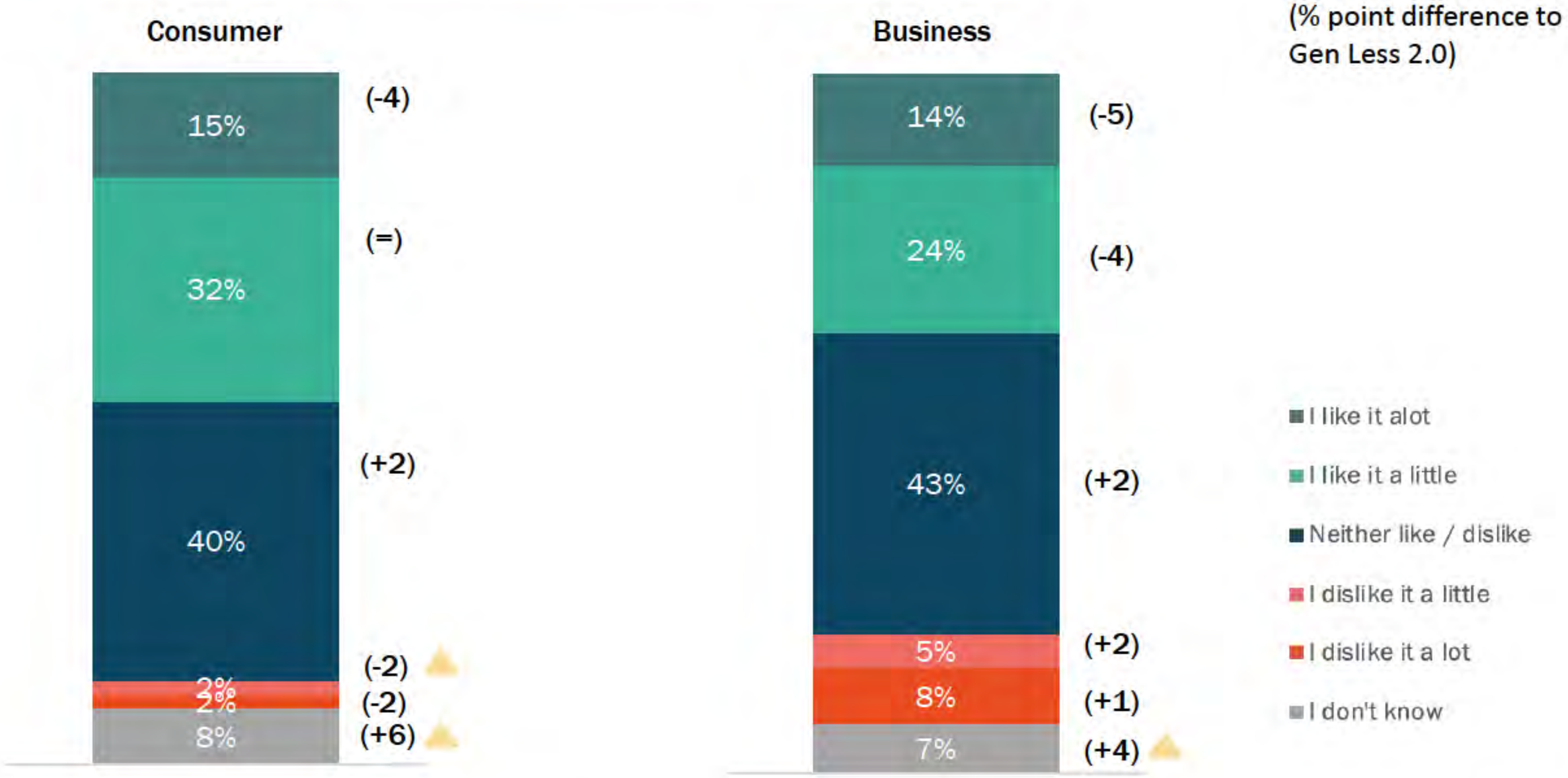
GENLESS_LIKE. You answered earlier that you saw some of the images and/or the Gen Less campaign before today. How much do you like what you saw?
Base Consumer: *Saw Gen Less 1.0 over total campaign period n=963, Saw Gen Less 2.0 over total campaign period n=1,350, Saw Gen Less 2.0 Dec-Nov 2021 n=224*
Base Business: *Saw Gen Less 2.0 Nov 2020 and May 21 n=514, Saw Gen Less 3.0 Nov 2021 n=318*

Statistically significant difference result compared to previous Gen Less campaign

TRA

The overall fall in likeability between GL2.0 and 3.0 is driven by an increase in those unsure of their response

Gen Less 3.0: granular likeability results



GENLESS_LIKE. You answered earlier that you saw some of the images and/or the Gen Less campaign before today. How much do you like what you saw?
Base Consumer: *Saw Gen Less 2.0 over total campaign period n=1,350, Saw Gen Less 2.0 Dec-Nov 2021 n=224*
Base Business: *Saw Gen Less 2.0 Nov 2020 and May 21 n=514, Saw Gen Less 3.0 Nov 2021 n=318*

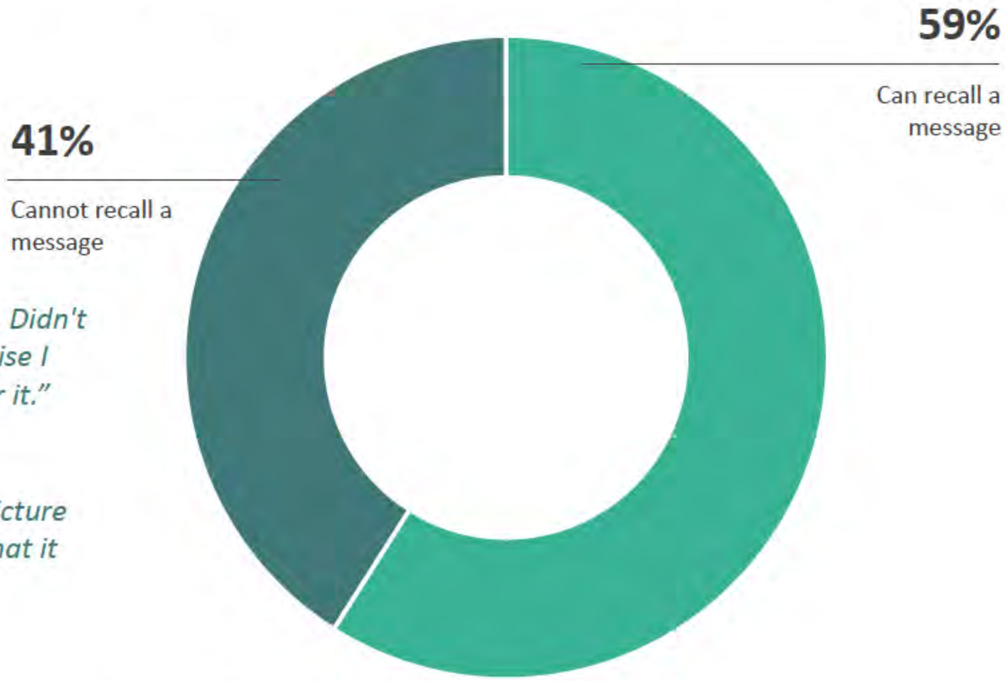
Statistically significant difference result when Gen Less 3.0 compared to Gen Less 2.0: ▲ ▼

TRA

Campaign outtakes and impact

Around 6 in 10 consumers can recall a message after seeing the ad

UNPROMPTED MESSAGE OUTTAKES: CONSUMER MONITOR



"Can't remember ... Didn't impress me otherwise I would of remember it."

"Can't remember anything but one picture and didn't know what it was about."

Most often ideas focused on:

- **Wasting less energy / using less / living with less (mentioned by around 3 in 10 who recalled a message)**
- **Or taking action today / change can happen / everyone can make a difference (also mentioned by around 3 in 10)**

"To be active in playing your part, as change comes from action rather than thoughts."

"These things changed history, you can too."

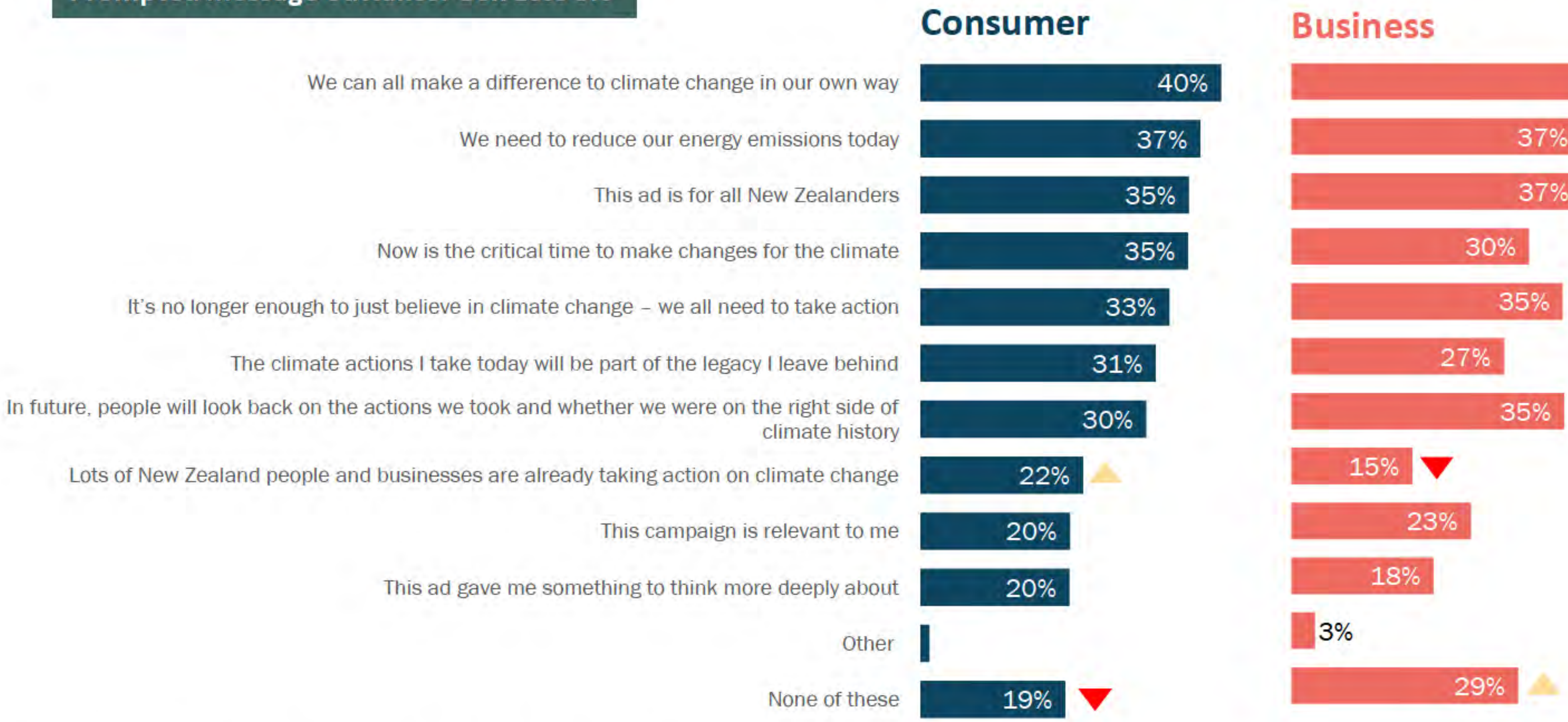
"That the time to act is now, don't just think about it, do something. Make history and make a change to remember and record in history."

What messages can you remember from the material? What was it trying to tell you?
***Base**: Recall Gen Less n=224*

TRA

Consumers are more likely to take away a message than businesses

Prompted message outtakes: Gen Less 3.0



GENLESS_PROMPT: Which of these statements do you agree with after seeing the advertising?
***Base**: Consumer Saw Gen Less 3.0 Nov – Dec 2021 n= 224, Business Saw Gen Less 3.0 Nov 2021 n=318*

Statistically significant difference between consumer and business results

TRA

And for both groups, key messages are less obvious than previous campaigns

Prompted message outtakes: Gen Less 3.0 vs Gen Less 2.0

	Consumers			Businesses		
	GL 1.0 (first month)	GL 2.0 (first month)	GL 3.0 (initial read)	GL 1.0 (first month)	GL 2.0 (first month)	GL 3.0 (initial read)
This ad gave me something to think more deeply about	31%	24%	20%	24%	31% ▲	18%
This campaign is relevant to me	26%	31% ▲	20%	23%	30%	23%
We can all make a difference to climate change in our own way	n/a	48%	40%	n/a	56% ▲	45%
This ad is for all New Zealanders	n/a	n/a	35%	n/a	n/a	37%
None of these	14%	8% ▼	19%	13% ▼	16% ▼	29%

GENLESS_PROMPT: Which of these statements do you agree with after seeing the advertising? ***Only consistent statements across research period shown. Note that 5 statements were shown for GL1.0, 8 statements for GL2.0 and 10 statements for GL3.0.***
Base*: Consumer: GL 1.0 first month n=45, GL2.0 first month n=101, GL 3.0 n=224; Business: GL 1.0 first month n=271, GL2.0 first month n=222, GL 3.0 n=318*

Statistically significant difference when compared to Gen Less 3.0 ▲▼

TRA

The current campaign is resulting in people taking similar levels of action

Taken action as a result of seeing campaign

		GL 3.0	GL 2.0	GL 1.0
Looked for more information about climate change	Business	13%	14%	28% ▲
	Consumer	16%	14%	19%
Visited the Gen Less website	Business	12%	11%	14%
	Consumer	13%	13%	15%
Talked to family or friends about the campaign// climate change	Consumer	14%	15%	16%
Talked to work colleagues about climate change (GL3.0) / our carbon footprint (GL2.0)	Business	10%	15% ▲	18% ▲
Took some action to reduce our climate change impact	Business	6%	2%	3%
	Consumer	1%	1%	3%
Other	Business	2%	2%	2%
	Consumer	1%	2%	2%

■ Business ■ Consumer

Demographic call outs

NZ Europeans are less likely to have taken action vs other demographics.

Consumers who are already taking more climate actions in general were more likely to take action here too.

25% of those aged 18-39 reported visiting the Gen Less website – vs. 6% of those aged 50+.

Smaller businesses with 0 – 5 FTE were significantly less likely to take action than those with 6 or more FTEs.

GENLESS_ACTION: (As a result of seeing this advertising campaign, which of the following actions did your business take?)
***Base**: Saw Gen Less 2.0 Nov 2020 and May 21 n=514, Saw Gen Less 3.0 Nov 2021 n=318*

Statistically significant difference when compared to Gen Less 3.0 ▲ ▼

TRA

And successfully reached a receptive audience who are engaged with the climate cause

Gen Less – Outcomes

	Seen Campaign	Not seen campaign	% point difference, seen vs. not seen
Take regular action to drive less / limit my use of petrol or diesel powered car in order to reduce impact on climate change	47%	35%	+12
Strongly agree governments should provide incentives to encourage behaviours that protect the environment	39%	28%	+11
Strongly agree I am prepared to change my own personal behaviour in order to reduce climate change	31%	20%	+11
Strongly agree I can make a personal difference to the environment	30%	20%	+10
Strongly agree we need to make changes to our energy use to address climate change, even if it means a change to our current lifestyle	30%	20%	+10
Take regular action to reduce air travel / limit flights in order to reduce impact on climate change	57%	50%	+7
Think reducing use of petrol / diesel powered vehicles would have the greatest impact on reducing climate change, if done by everyone	45%	43%	+2

CLIMATE_EFFECT_ Which of these actions do you think would have the greatest impact on reducing climate change, if done by all New Zealanders? (Top 3) ***CLIMATE_BELIEFS*** How much do you agree or disagree that... (Strongly Agree) ***CLIMATE_ACTIONS.*** Which of the following actions do you take in order to reduce your climate change impact? (Top 2 box) - Take Regular Action **Q177.** Thinking about your next vehicle purchase, how likely are you to consider the following vehicles? (Top 2 box – likely) ***Base:*** *n=141 seen campaign; n=387 not seen campaign.*

Significantly higher/lower than average

TRA

Ngā mihi.

TRA