



# EECA Consumer Monitor

**Edition 4: July–September 2022**

Insight into New Zealanders' climate change attitudes and actions



# Background

**EECA's market research programme monitors the mood of the nation relating to climate change, energy emissions and efficiency, and topics like electric vehicles.**

**We use insights from three key sources to track New Zealanders' response to key issues and initiatives relevant to EECA and to track how we're going vs our strategic focus areas.**

## 1. CONSUMER MONITOR

Every quarter, we survey 750 adult New Zealanders to track their beliefs, behaviours and attitudes to climate change and energy. The representation of these respondents is ensured across age, gender and region.

## 3. BUSINESS MONITOR

Every six months, we survey 500 New Zealand businesses, sampling business decision makers who are responsible for energy or transport decisions. This report is available separately.

## 2. CULTURAL OVERLAY AND RADAR

Every quarter, we review New Zealanders' comments on articles from mainstream news sources, and social media. A 'non-filtered' approach to understand how New Zealanders' views are changing via listening to day-to-day conversations. Natural language processing and machine learning is used to achieve this.

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

# Overview

## Context and Action

Since the last update, we've seen a variety of environmental, economic and political events occur such as continuously high costs of living, easing of covid restrictions and local elections. It's once again a busy quarter for New Zealanders.

However we still see economic issues dominate the conversation. This quarter inflation has reached an annual percentage change of 7.2%, and consumer confidence is still low.

Winter generally means that household energy bills increase, as New Zealanders turn on their heaters and take longer showers. However, data indicates that due to the high cost of living, people are more conscious of their energy use at home this quarter.

We've reached a new milestone for transport, with 50% of New Zealanders now considering a BEV/PHEV – petrol and diesel vehicle consideration continue their downwards trend. EV favourability is also at an all time high, and New Zealanders are increasingly realising the benefits of EVs.

# Agenda

1

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**Current New  
Zealand Landscape**

2

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**Hearts and Minds**

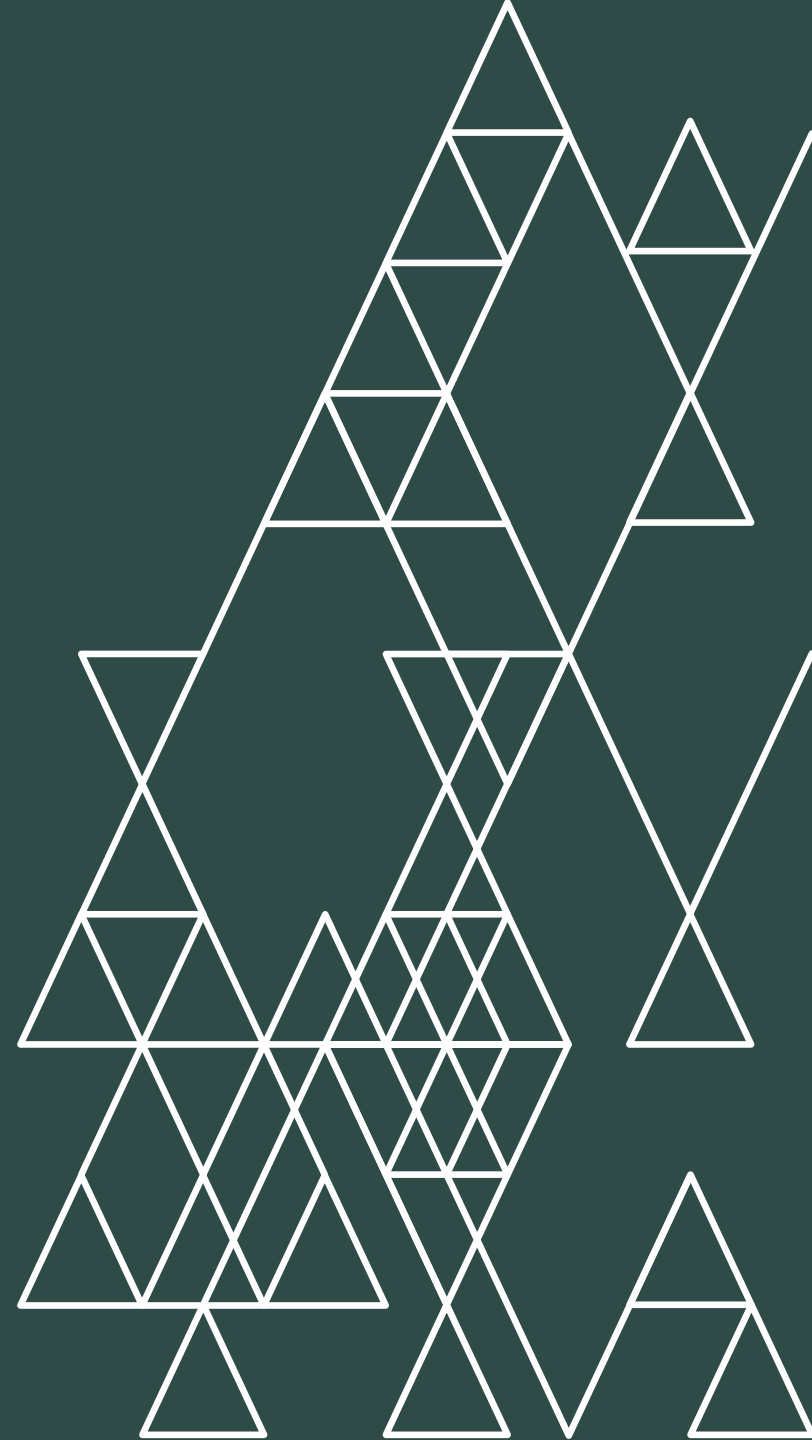
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**Transport**



# Current New Zealand Landscape



# The landscape over the last three months has been more uncertain than ever

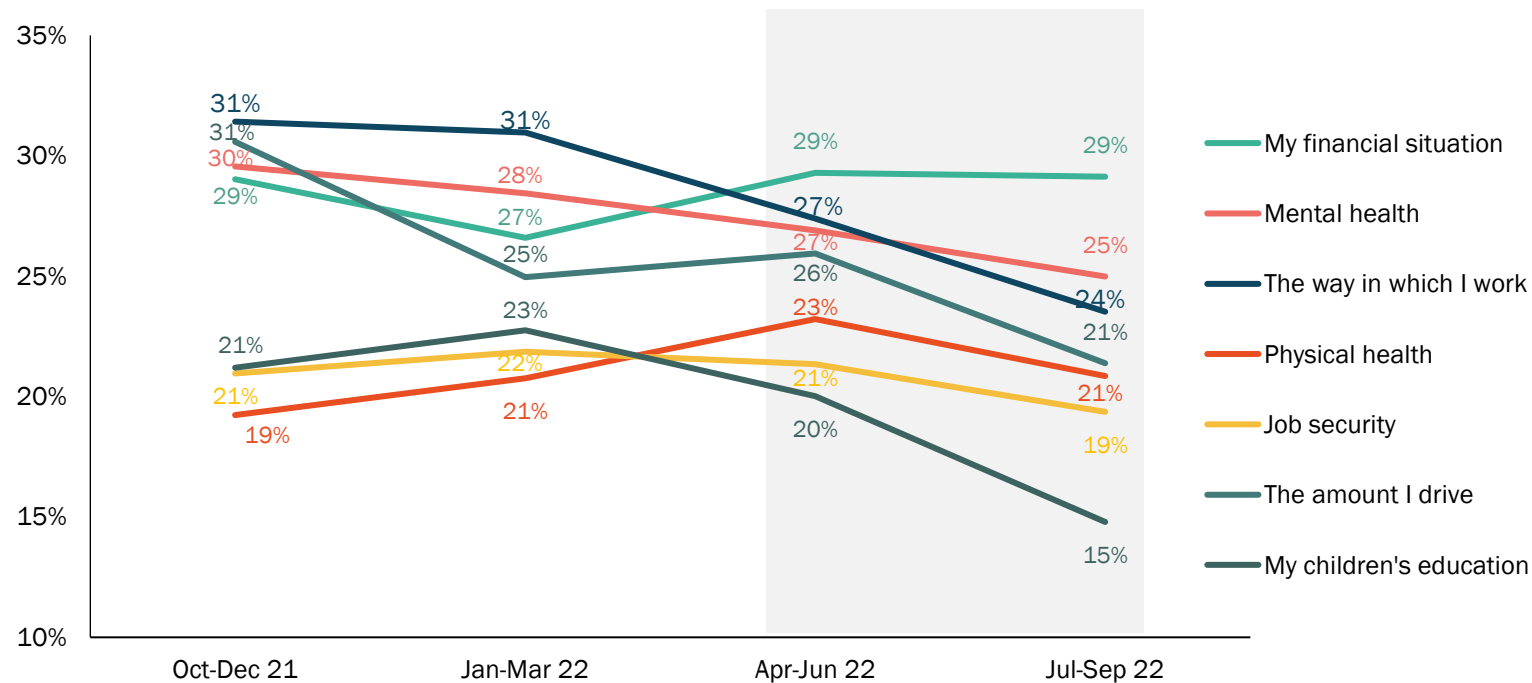
September in particular being a busy month for a variety of economic, environmental, and political reasons



# The general impact felt from Covid-19 is beginning to decrease, reflected by the nationwide easing of restrictions

However, the impact on New Zealanders' financial situation is still strong

Impact of COVID-19 over time – A huge impact/significant impact



The impact on financial situation is likely more driven now by the cost of living rather than Covid-19 itself.

# Economy-related issues have once again become more top of mind, with climate-change-related issues softening

This is following a strong increase for climate change last quarter

## Importance of issues to New Zealanders – Important/Very important

	Important / Very important	vs last quarter
The cost of living	93%	2%
New Zealand's economy	87%	1%
Violence in society	86%	4%
Protection of New Zealand children	85%	1%
Not having access to good, affordable healthcare	85%	1%
Availability of affordable housing	84%	-2%
Mental health issues	83%	1%
Caring for the ageing population	80%	2%
The physical health of New Zealanders	80%	4%
Pollution of lakes, rivers, and seas	78%	1%
Build up of plastic in the environment	72%	-4%
The state of New Zealand's transport infrastructure	69%	1%
Climate change	68%	-1%

Last quarter we saw an increase in climate change as an important issue.

Climate change was top of mind likely due to the context – Clean Car Discount, budget announcements, emission reduction plan.

With less conversations/events 'out there' this quarter, it's softened as an issue.

GENERAL\_ISSUES How important do you consider each of the following issues to be for New Zealand? NET Important / Very Important.  
Base: Total Sample, n=814



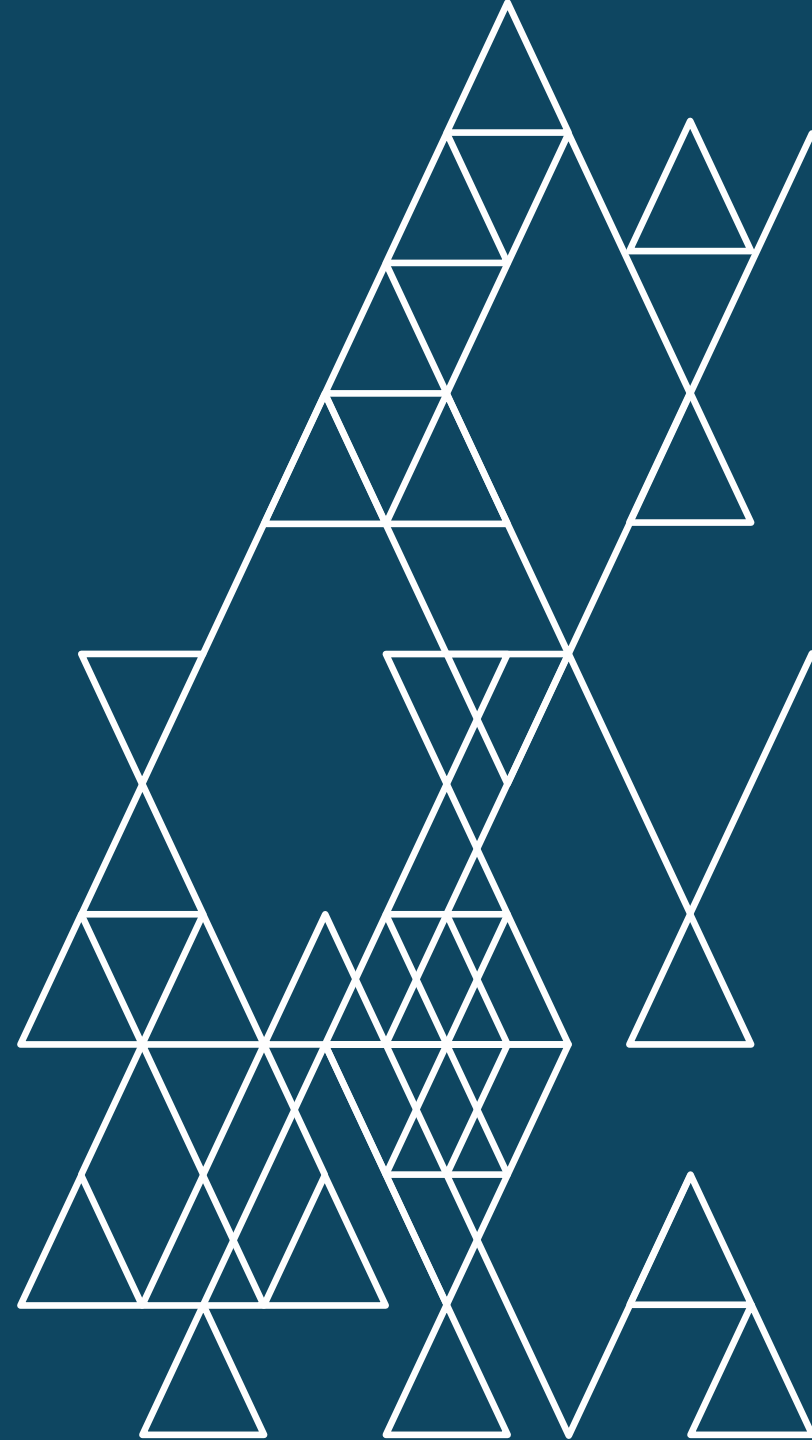


## Covid-19 restrictions have eased, but the financial strain felt from the high cost of living has not

With inflation levels soaring and consumer confidence levels continually low, the cost of living is still firmly the most important issue faced by New Zealanders.

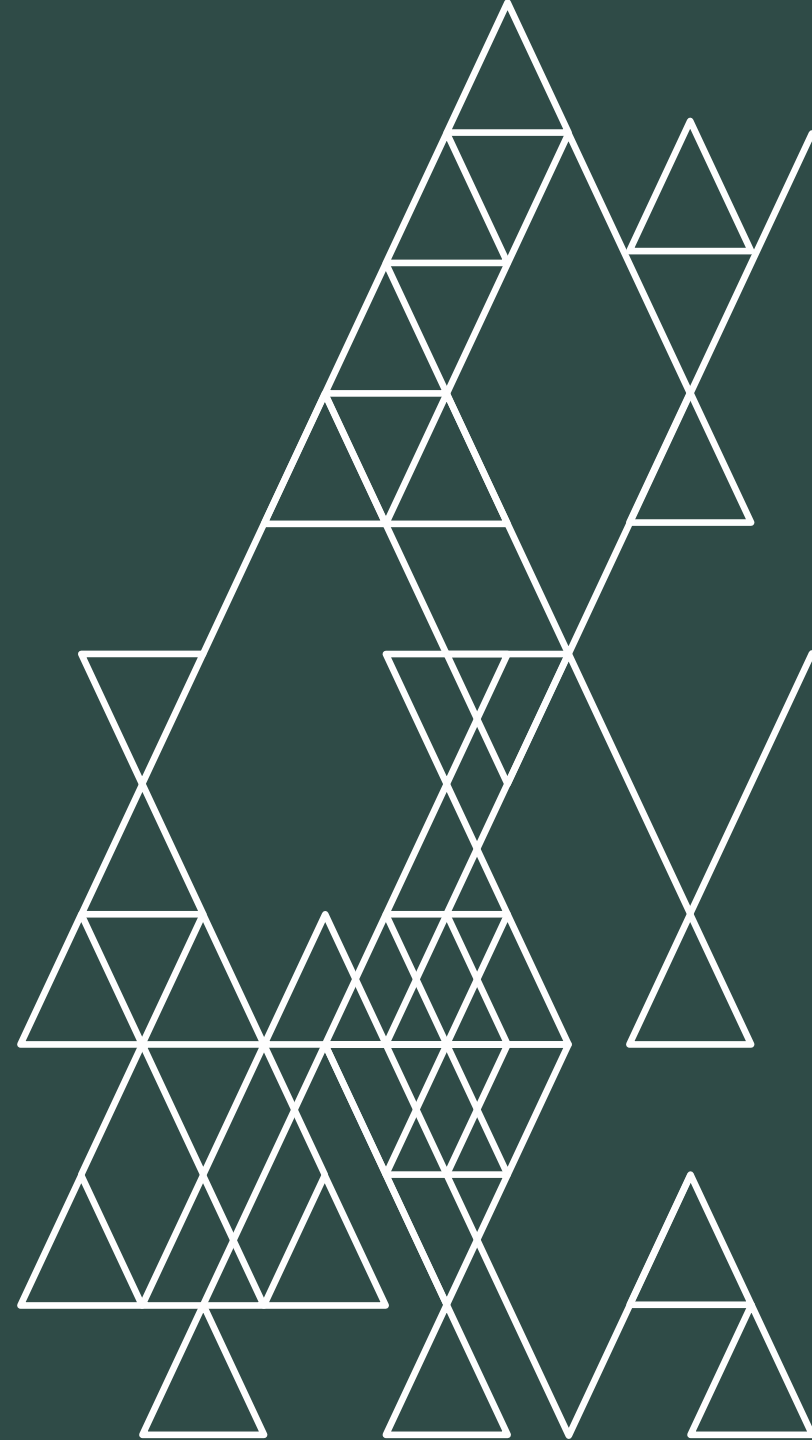
And not only has it been felt day-to-day, but it's also dominated conversations. Climate change related topics are less top of mind, and as a result considered relatively less important.

This is the context we are operating in. Let's now take a look at how New Zealanders' beliefs and actions have changed throughout this quarter.



# Hearts and Minds

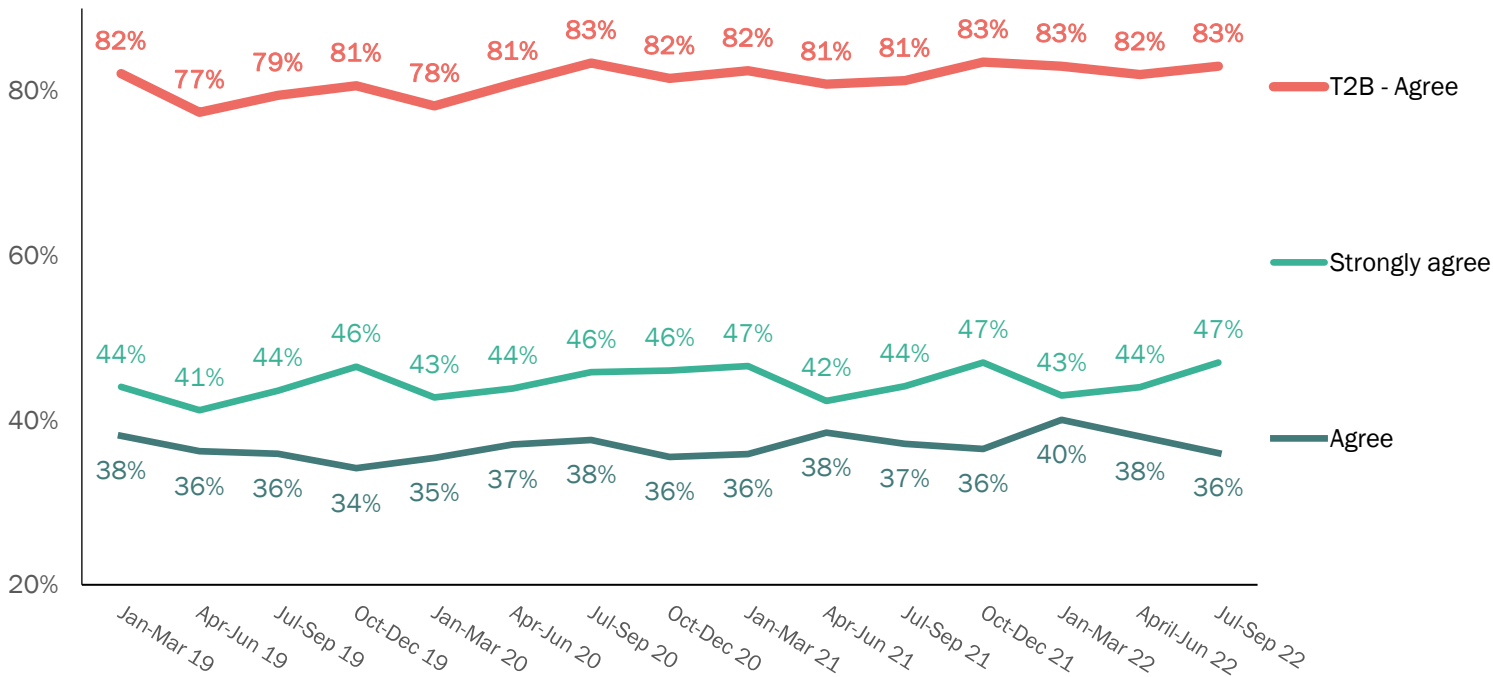
Understanding New Zealanders' climate change beliefs, attitudes and behaviours.



# Belief that climate change is real is largely unchanged

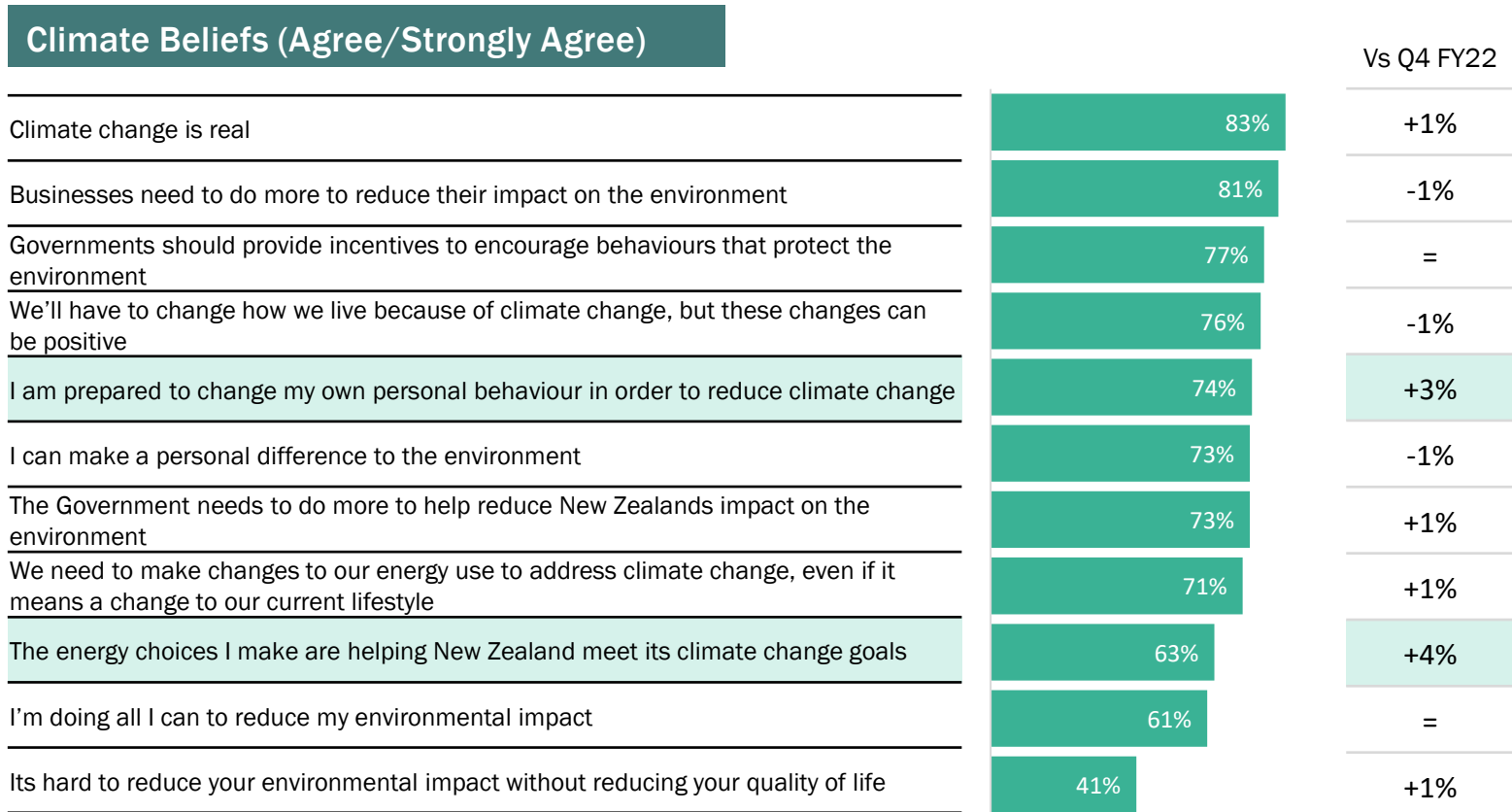
With a 3-point increase in our strongly agree box

Climate Beliefs: Climate change is real (Agree/Strongly Agree)



# Belief that energy choices made are helping New Zealand meet its climate change goals is at its highest point ever

And preparedness to change personal behaviour is at a two year high



‘The energy choices I make...’ usually decreases in Q1 – it’s mid-winter, and New Zealanders are likely using their heaters.

The average for Q1 in previous years has been 56% - so an agreement level of 63% this quarter suggests that there has been a a conscious change in energy-use behaviour.





# Aligning to this, more New Zealanders have chosen energy efficient lights and are limiting their energy use at home – actions drive beliefs

## Actions taken always/almost always

	Vs Q4 FY22	
Recycled as much as possible	83%	+2
Chosen energy efficient lights	70%	+2
Chosen energy efficient appliances	58%	-1
Limited my energy use at home	58%	+2
Limited my flights	48%	-2
Avoided the use of plastic	39%	-4
Limited my use of petrol or diesel powered vehicles	35%	-2
Chosen to buy products with a low carbon footprint	30%	+2
Bought organic food	17%	-2



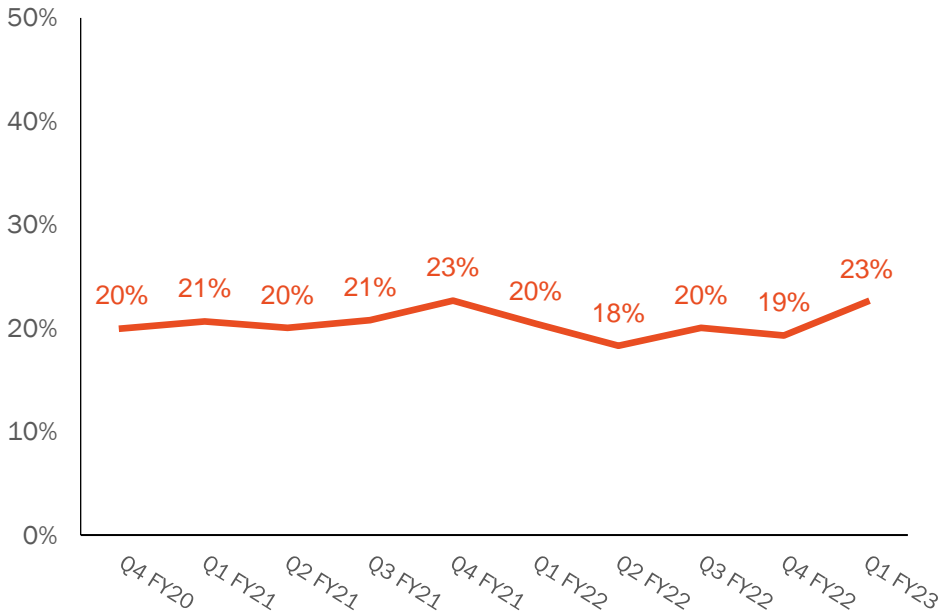
# Belief that ‘using less energy at home’ has one of the greatest impacts in reducing climate change is high, particularly for the time of year

As more people are doing the action, it’s perceived to be more impactful

## Actions perceived as most impactful

	Vs Q4 FY22	
Recycling as much as possible	55%	1%
Avoiding the use of plastic	44%	4%
Reducing our use of petrol or diesel powered vehicles	42%	-2%
Choosing to buy products with a low carbon footprint	35%	2%
Using less energy at home	23%	3%
Choosing energy efficient appliances	23%	-2%
Reducing our flights	19%	2%
Choosing energy efficient lights	15%	-1%
Buying organic food	5%	-2%

## ‘Using less energy at home’ trended

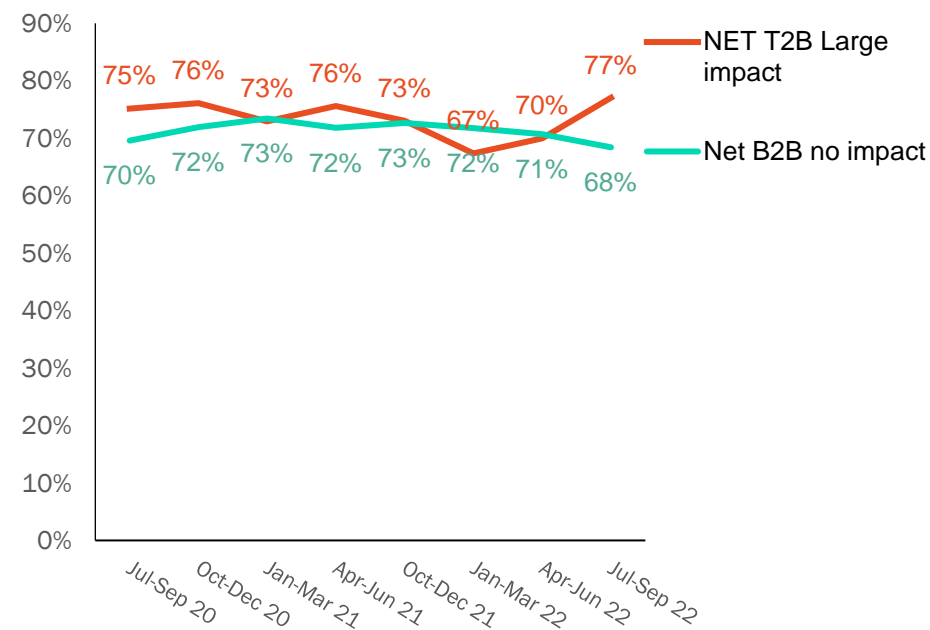


CLIMATE\_EFFECT\_New - Which of these actions do you think would have the greatest impact on reducing climate change, if done by all New Zealanders? (Top 3) Base: n=241



# New Zealanders who are feeling financially impacted at the moment are even more likely to hold these energy-related beliefs and actions

‘we need to make changes to our energy use ’ trended



Beliefs and Effects

	NET T2B feeling financial impact of Covid-19	NET B2B not feeling financial impact of Covid-19
Belief: We need to make changes to our energy use (T2B)	77% ▲	68%
Climate Effect: Limiting my energy use at home	62%	56%

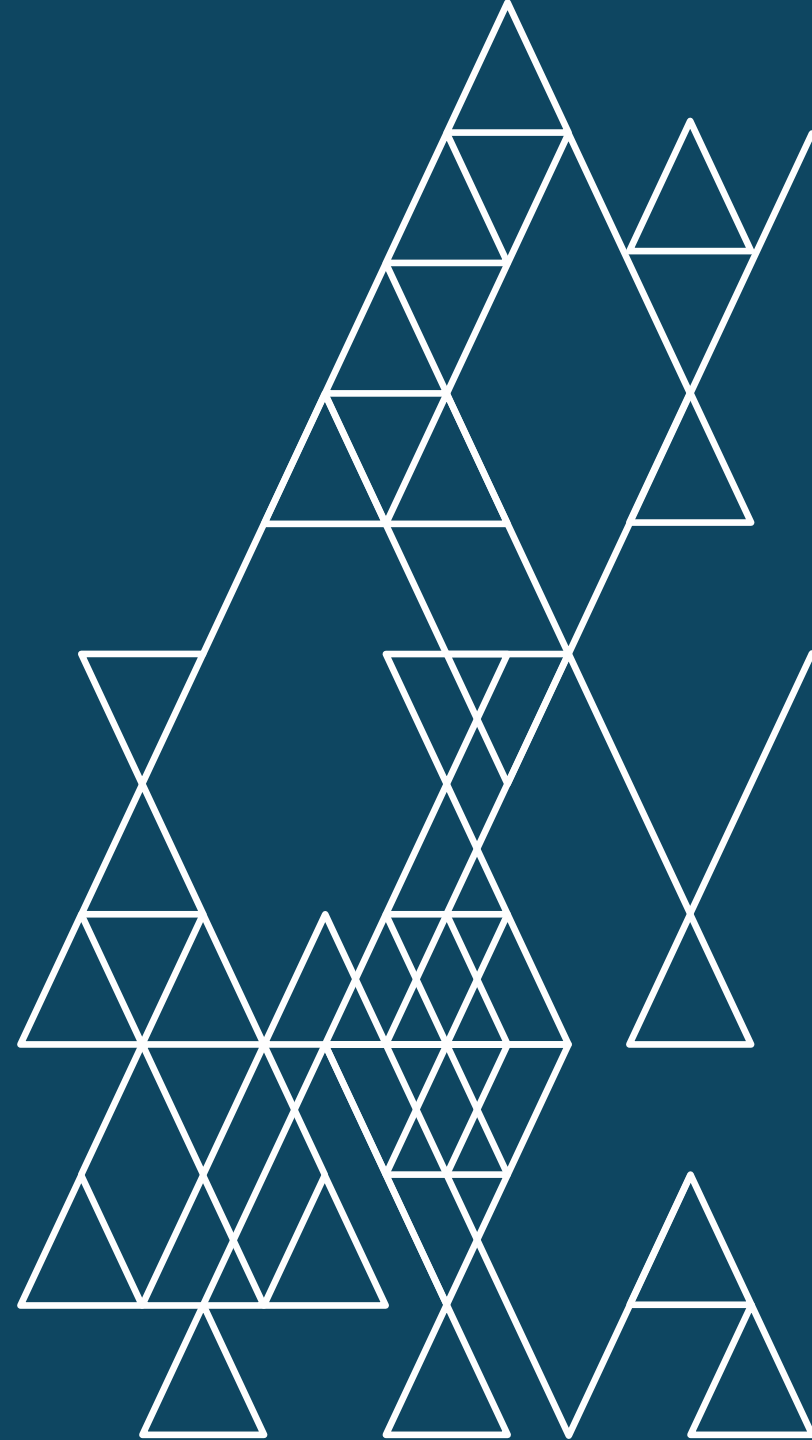
Note: Question not asked Jul-Sep 2021

Statistically significant difference



**Despite the climate crisis having been deprioritised, we're seeing more people taking action in reducing their energy use at home.**

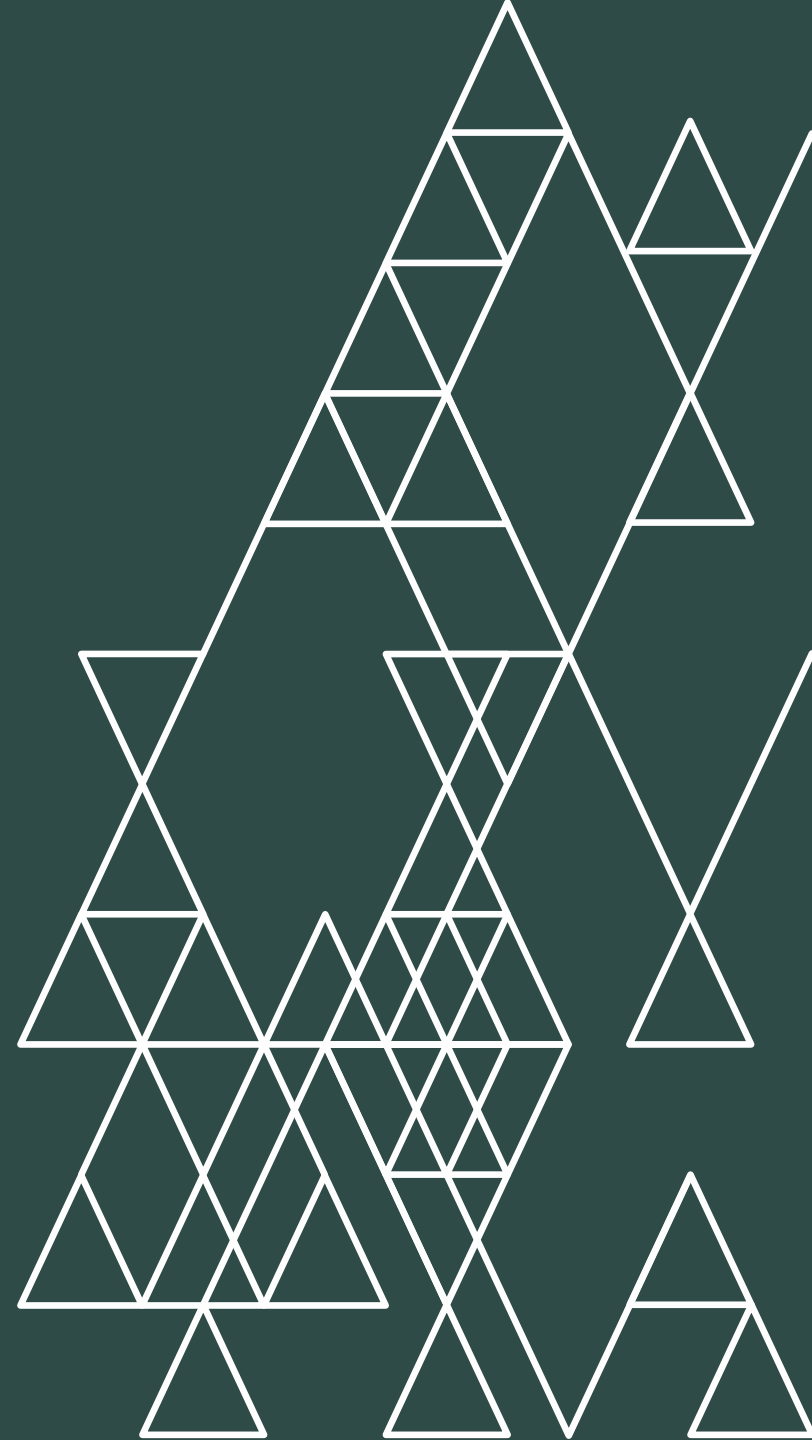
Winter usually means that heaters turn on, but higher bills this winter, along with climate awareness, are a cause for New Zealanders to be more conscious of reducing their energy use. This is especially and increasingly the case for those who are feeling financially strained. Actions are driving beliefs.





EECA

Transport



# What's been happening in transport this quarter?

## World Car Free Day

World Car Free Day on the 22<sup>nd</sup> of September, with a campaign from Gen Less encouraging New Zealanders to take part.



## Easing of covid restrictions

The easing of restrictions from early September meant that masks are no longer required to be worn on public transport.



## Petrol/diesel prices decrease

After spiking last quarter, prices have seen a decrease. However, they still remain at high levels.



<https://genless.govt.nz/for-business/moving-people/commute-sustainably/going-car-free-in-your-workplace/>

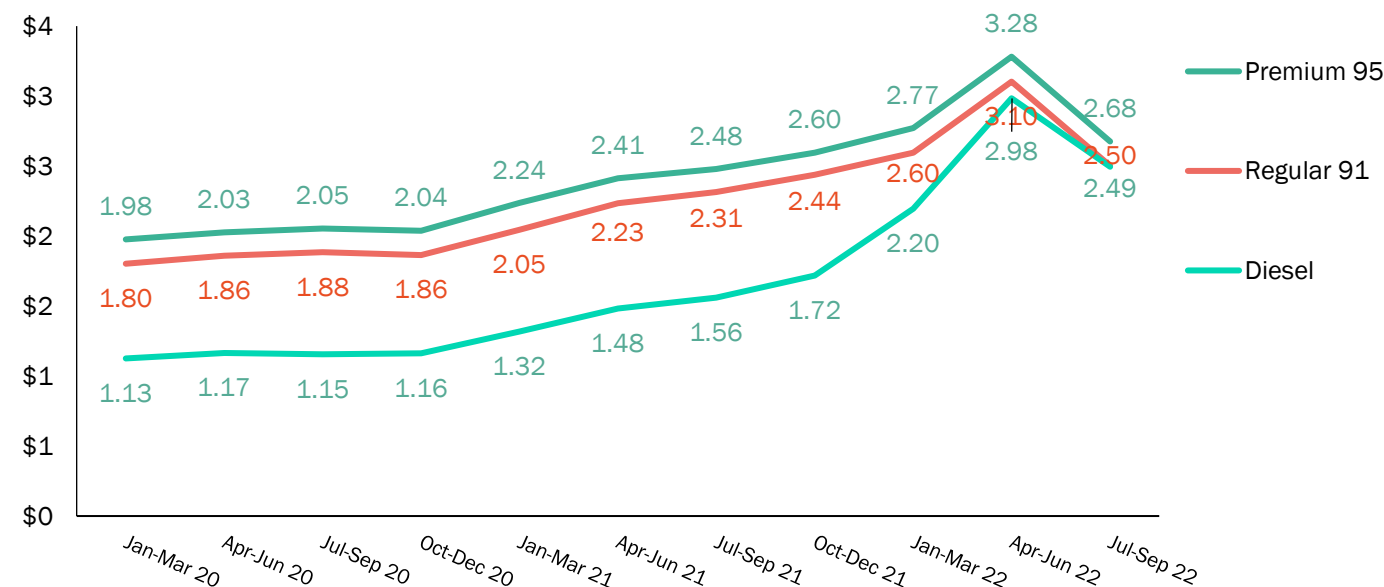
<https://www.reuters.com/world/asia-pacific/new-zealand-ends-most-covid-restrictions-pandemic-worry-eases-2022-09-12/>

<https://www.mbie.govt.nz/building-and-energy/energy-and-natural-resources/energy-statistics-and-modelling/energy-statistics/weekly-fuel-price-monitoring/>

# Petrol and diesel retail prices saw a decrease this quarter, after spiking last quarter

This put 91 and 95 below their Jan-Mar levels – however Diesel remained high, and on par with 91

Petrol/diesel discounted retail prices per litre by quarter



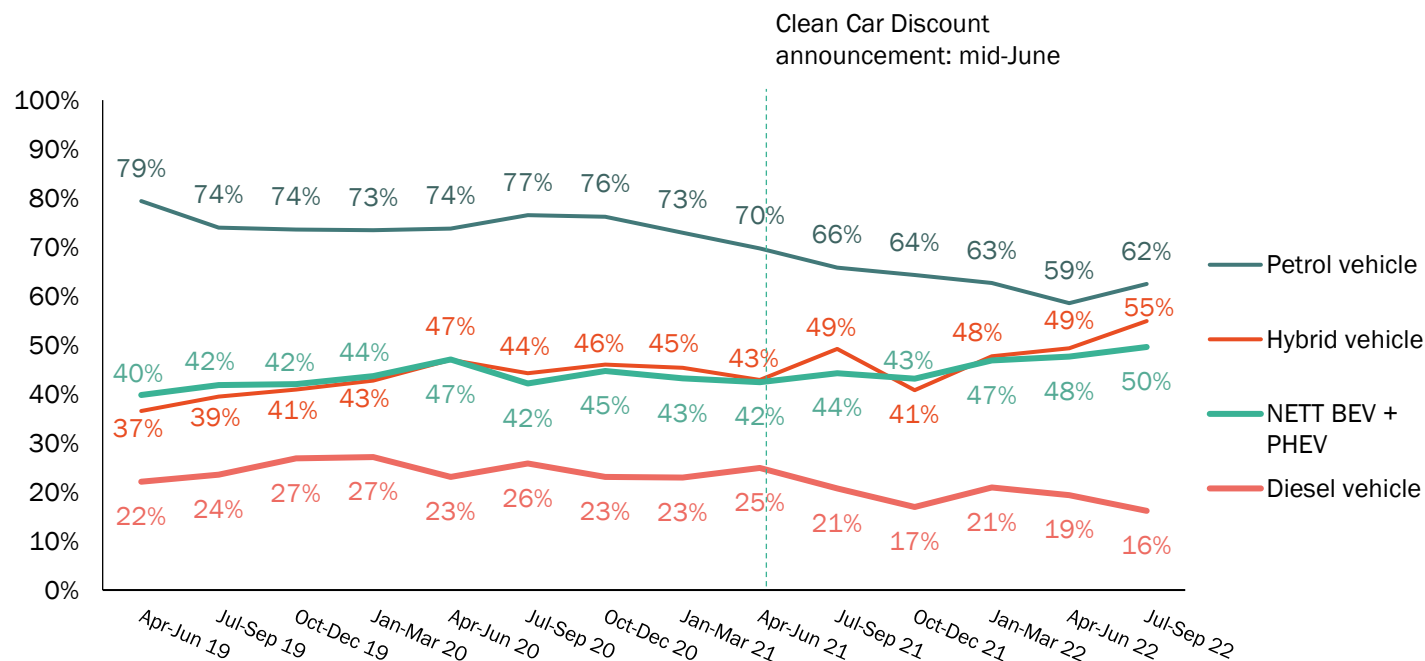
Source: <https://www.mbie.govt.nz/building-and-energy/energy-and-natural-resources/energy-statistics-and-modelling/energy-statistics/weekly-fuel-price-monitoring/>

Note: Figures based on the prices recorded at the end of the last week of each quarter.

# EV and hybrid vehicle consideration are at their highest points ever; diesel vehicle consideration is at its lowest

The gap between hybrid and petrol is now just 7 points!

## Vehicle consideration



The rebound in petrol prices likely worked in the favour of petrol vehicle consideration.

However, Diesel now sitting on par with Regular 91 (where there has historically always been a gap) will be making diesel vehicles less appealing.

There are a number of different types of vehicles currently being sold in New Zealand. Thinking about your next vehicle purchase, how likely are you to consider the following vehicles? NET Somewhat likely / Very likely  
Base: n=733

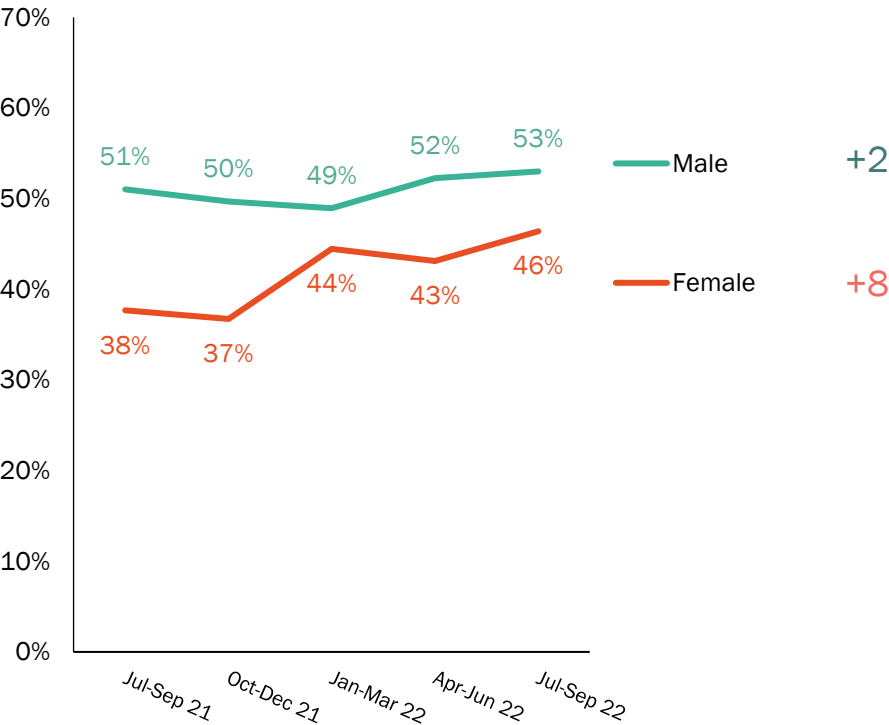




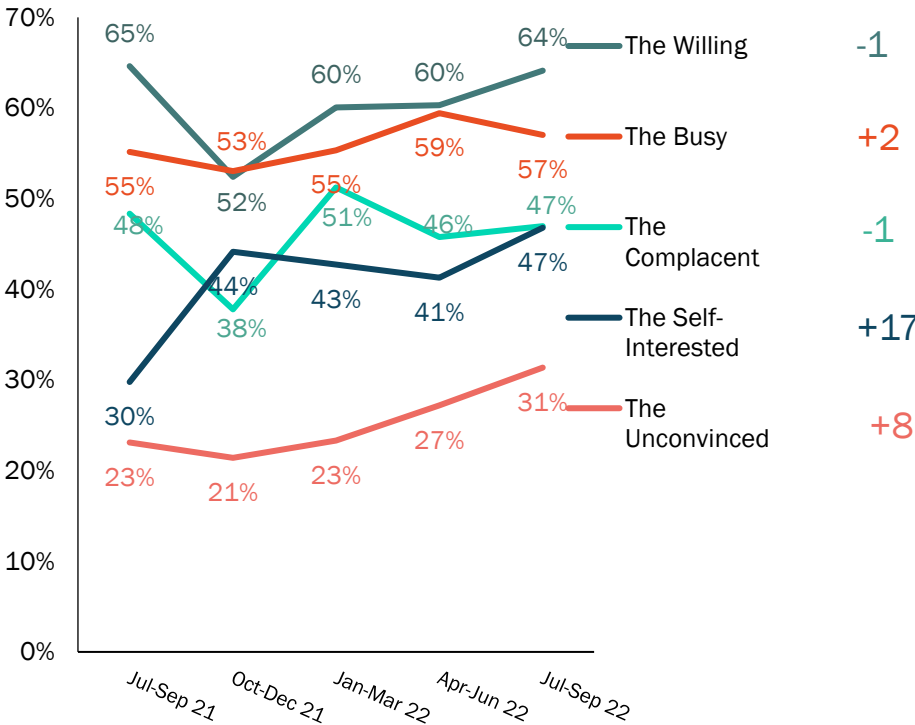
# It's those who haven't considered EV's as much who are seeing the strongest gains over the last year

BEV/PHEV Vehicle consideration

Growth since Q1 FY22



Growth since Q1 FY22

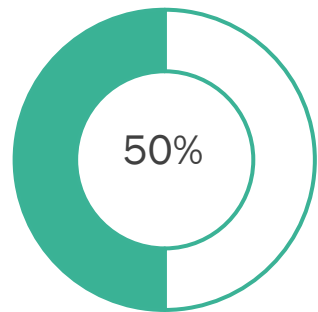


There are a number of different types of vehicles currently being sold in New Zealand. Thinking about your next vehicle purchase, how likely are you to consider the following vehicles? NET Somewhat likely / Very likely  
Base: n=733

# Consideration and favourability are up but confidence holds; the context means that EVs look relatively more appealing

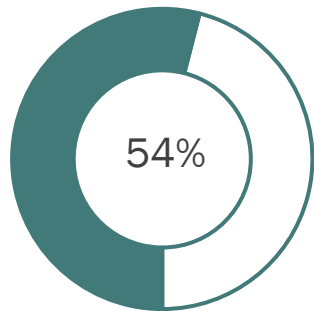
## EV Key metrics

BEV / PHEV Consideration



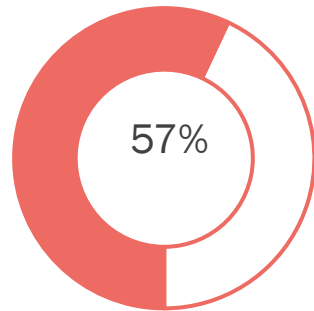
+2 vs last quarter  
(Highest score ever)

Confidence



No change vs last quarter  
(Highest score ever)

Favourability



+3 vs last quarter  
(Highest score since Q3 2021)

*EV4 How favourable or unfavourable is your overall opinion or impression of Electric Vehicles? (NET Mainly / Very Favourable); EV5 To what extent are you confident that Electric Vehicles can meet your needs? (NET Somewhat / Very Confident); Q177 Thinking about your next vehicle purchase, how likely are you to consider the following vehicles? (NET BEV / PHEV);*

*Base: Total Sample -n=434-832*

Statistically significant change compared to previous quarter



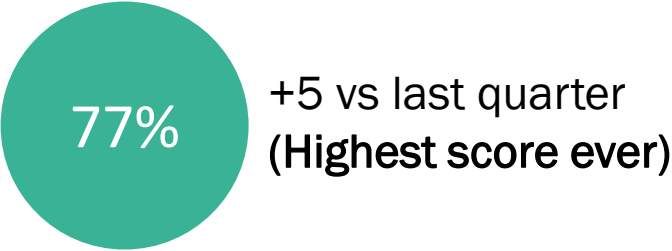
# Almost all benefits to EVs are at their highest points ever

The only benefit not at a new high is ‘they are quiet while driving’

## EV Benefits

	Jul-Sep 22	Gap vs last quarter
They produce less air pollution	66%	3%
They can be charged at home	58%	0%
They are quiet when driving	55%	0%
They produce fewer greenhouse emissions	54%	7%
They're cheaper to run	51%	5%
They can be charged independent of petrol companies	43%	5%
They use renewable energy	41%	6%
They use an innovative technology	37%	5%
They're cheaper to maintain	25%	0%
They accelerate faster than petrol cars	19%	2%
Something else - please specify	1%	0%
None of the above	8%	-2%

## Clean Car Discount Awareness



## The current context continues to work in favour of EVs, regarding reducing petrol- and diesel-vehicle use

While petrol and diesel prices saw a decrease from their spike last quarter, consideration for EVs continues its momentum with half of New Zealand considering one for their next purchase.



# Thank you