

# EECA Consumer Monitor

Quarterly Report Q2 FY23 (October – December 2022)

Insight into New Zealanders' climate change attitudes and actions





# Background

**This research monitors the mood of the nation around climate change, energy efficiency and topics like EVs.**

**It tracks 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.**

## 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.

Surveys took place between October – December 2022 and 774 respondents took part.

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.

# Our 'questions of the quarter'

We bring in new questions every second quarter for areas we wish to better understand. This quarter, we wanted to understand the drivers behind information seeking and action taking.

## Climate motivations:

*Think about specific actions that you personally take against climate change. Which of the following motivates you to do so?*

## Climate barriers:

*And what would you say gets in the way of you taking more climate actions?*

## Climate progress

*How much progress do you think New Zealand is making in taking action against climate change?*

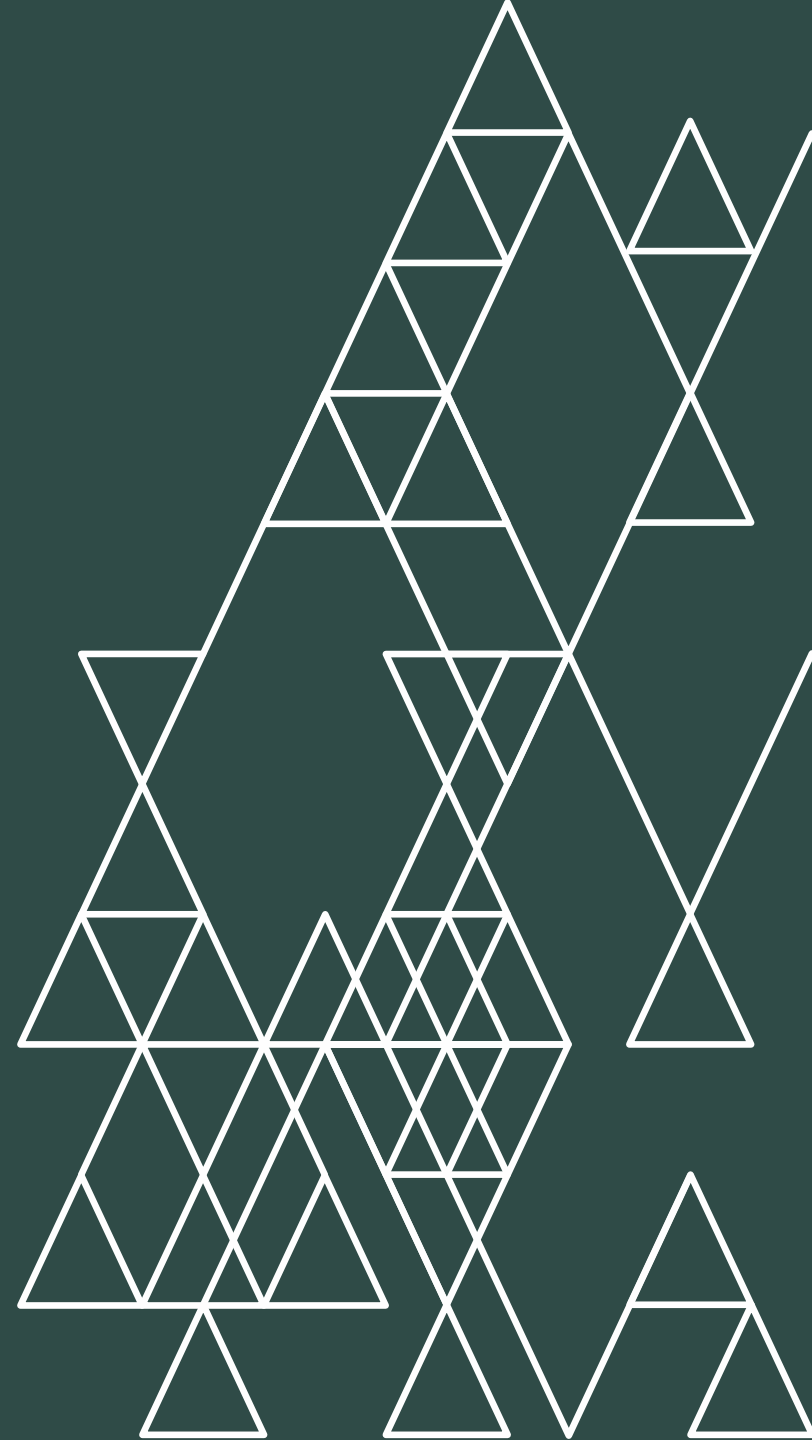
## Climate information sources

*Where do you currently get information about climate change from?*

## Climate information trust

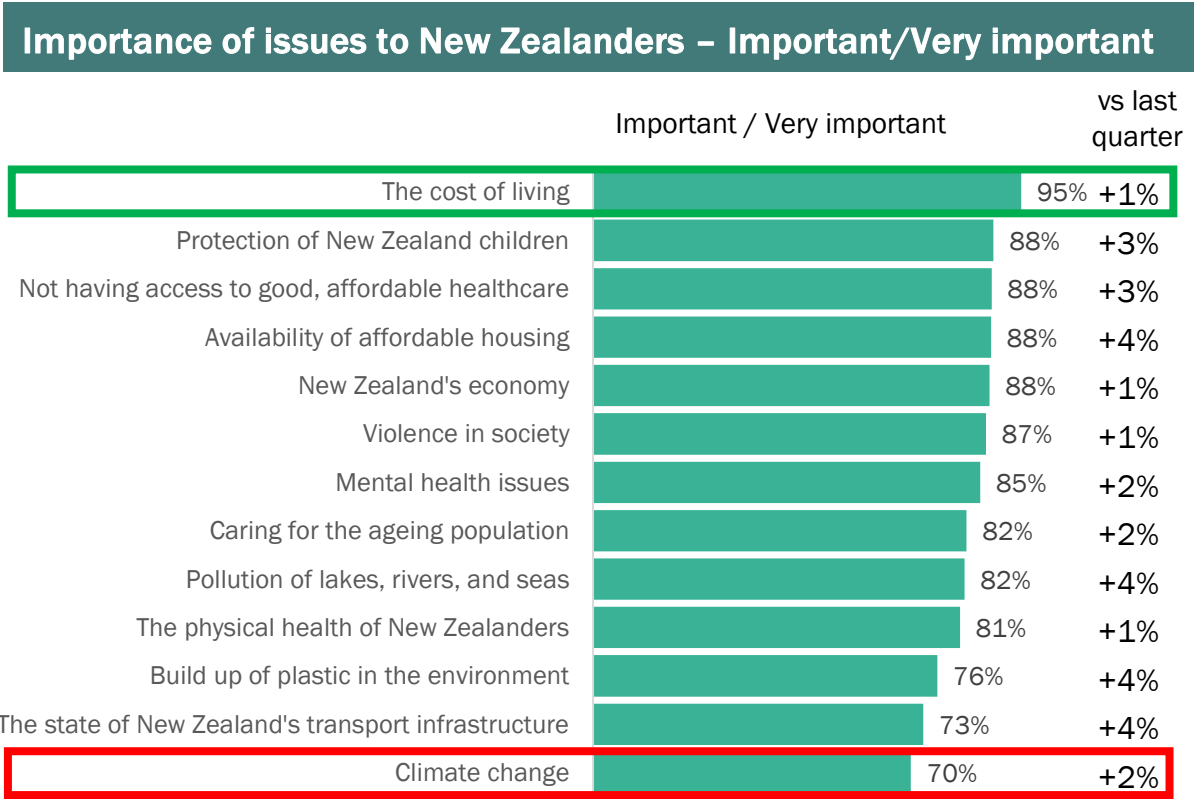
*And which sources would you/do you trust to get climate change information from?*

# Current New Zealand Landscape



# It's another tough context for New Zealanders – all issues are being seen as increasingly important

The cost of living reached a new high as an important issue.



Inflation remained high for the quarter, with an annual inflation rate of 7.2% in December.

And this is translating into decision making and real behaviour, with multiple data sources indicating a decrease in consumer spending over the Christmas period and an increase in consumer arrears.

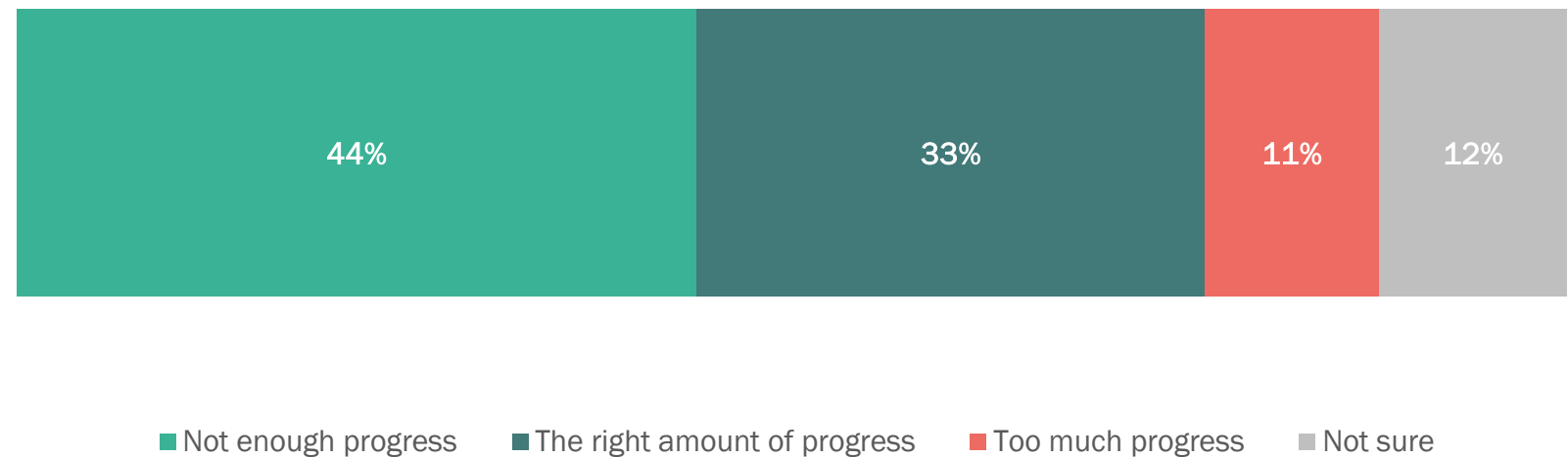
It's a real issue that's being felt every day.



# Despite climate change sitting lower as an issue, there's a strong appetite for New Zealand to make more progress

The majority of New Zealanders either believe that we're not making enough progress, or that we're making the right amount.

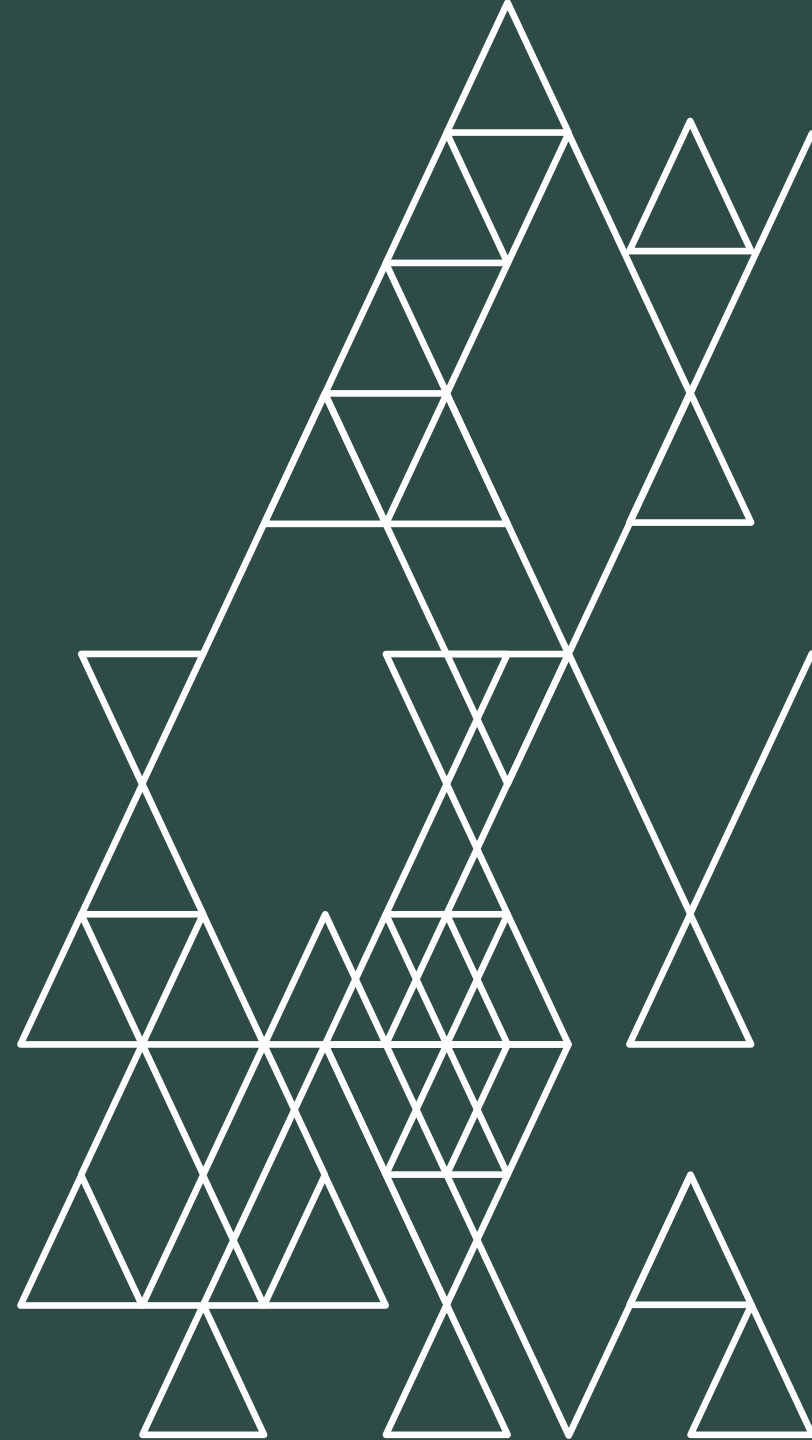
## New Zealand Progress – taking action against climate change



Those who think that climate change is an important issue are significantly more likely to believe that we're not making enough progress.

# Climate change information

Understanding where New Zealanders get their climate change information from, and who they trust



# 4 in 10 New Zealanders agree that they know where to access information about how to reduce and measure their personal emissions

However, just 18% of people rate themselves as having a good level of knowledge about how to reduce emissions, and 24% are actively looking for this information. There's a disconnect where people know where to look, but aren't doing it.



How much do you agree/disagree that you know where to access information about how to measure and reduce your personal carbon emissions? On a scale of 0 - 10, how would you rate your level of knowledge about how you can reduce your carbon emissions? What best describes your level of interest in finding information or advice that can help you lower your carbon emissions?

Base: n=814

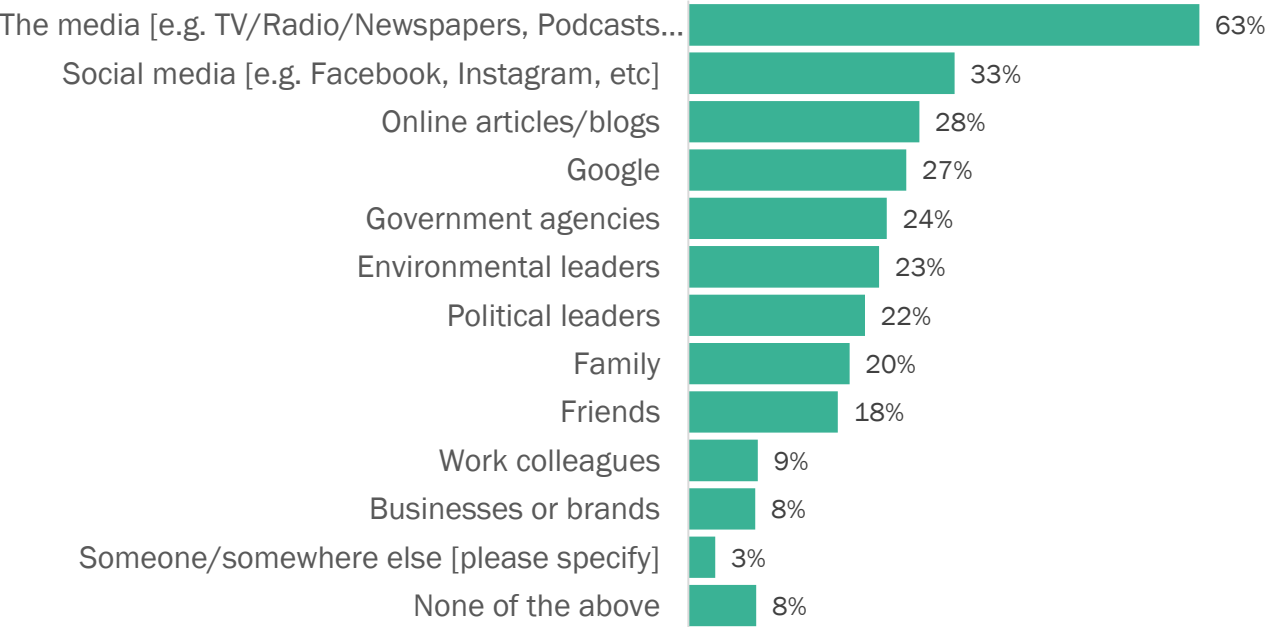




# The leading sources of climate change information that people use are the media and social media

Government agencies sit at 5<sup>th</sup> on the list.

## Climate change information – current sources used



And there’s a clear generational difference:

Those 50+ years old are the most likely to currently get climate change information from the media (74%), compared to 48% of those 18-29.

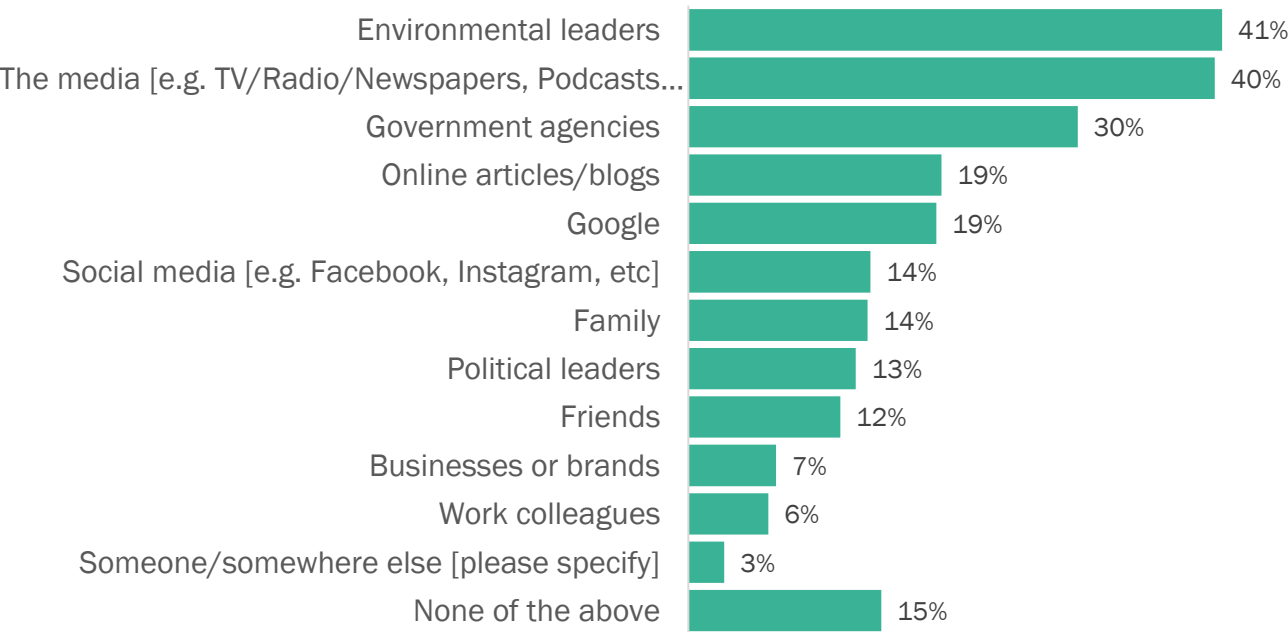
And conversely, 53% of those 18-29 are currently getting climate change information from social media, versus 22% of those 50+ years old.



# However, when it comes to who people want to hear from the most, environmental leaders take the top spot

People also want to hear from government agencies, which moves up the list to 3<sup>rd</sup> place.

## Climate change information – sources people trust



Interestingly, females are significantly more likely to trust environmental leaders (47%) versus males (35%).

And those 50+ are more likely to trust government agencies (36%).



# There's a disconnect between where people are currently getting their information versus who they'd like to hear from

## Climate change information – currently hear from versus trust

	Hear from	Trust	Difference
The media [e.g. TV/Radio/Newspapers, Podcasts etc]	63%	40%	-22%
Social media [e.g. Facebook, Instagram, etc]	33%	14%	-19%
Online articles/blogs	28%	19%	-9%
Google	27%	19%	-8%
Government agencies	24%	30%	5%
Environmental leaders	23%	41%	17%
Political leaders	22%	13%	-9%
Family	20%	14%	-6%
Friends	18%	12%	-7%
Work colleagues	9%	6%	-2%
Businesses or brands	8%	7%	-1%
Someone/somewhere else [please specify]	3%	3%	
None of the above	8%	15%	

} Hearing from these sources more than they want to.

} Hearing from these sources less than they want to.

Where do you currently get information about climate change from?

And which sources would you/do you trust to get climate change information from?

Base: n=774



# And this disconnect exists across different demographics

Climate change information – difference between currently hear from versus trust

	Total	18-29	30 - 39 years	40 - 49 years	50+	Male	Female	Auckland	Non- Auckland
The media [e.g. TV/Radio/Newspapers, Podcasts etc]	-22%	-15%	-26%	-19%	-25%	-22%	-22%	-19%	-24%
Social media [e.g. Facebook, Instagram, etc]	-19%	-31%	-26%	-15%	-11%	-15%	-22%	-18%	-19%
Environmental leaders	17%	15%	22%	17%	17%	13%	22%	16%	18%
Government agencies	5%	4%	4%	2%	8%	6%	5%	5%	6%

} Hearing from these sources more than they want to.

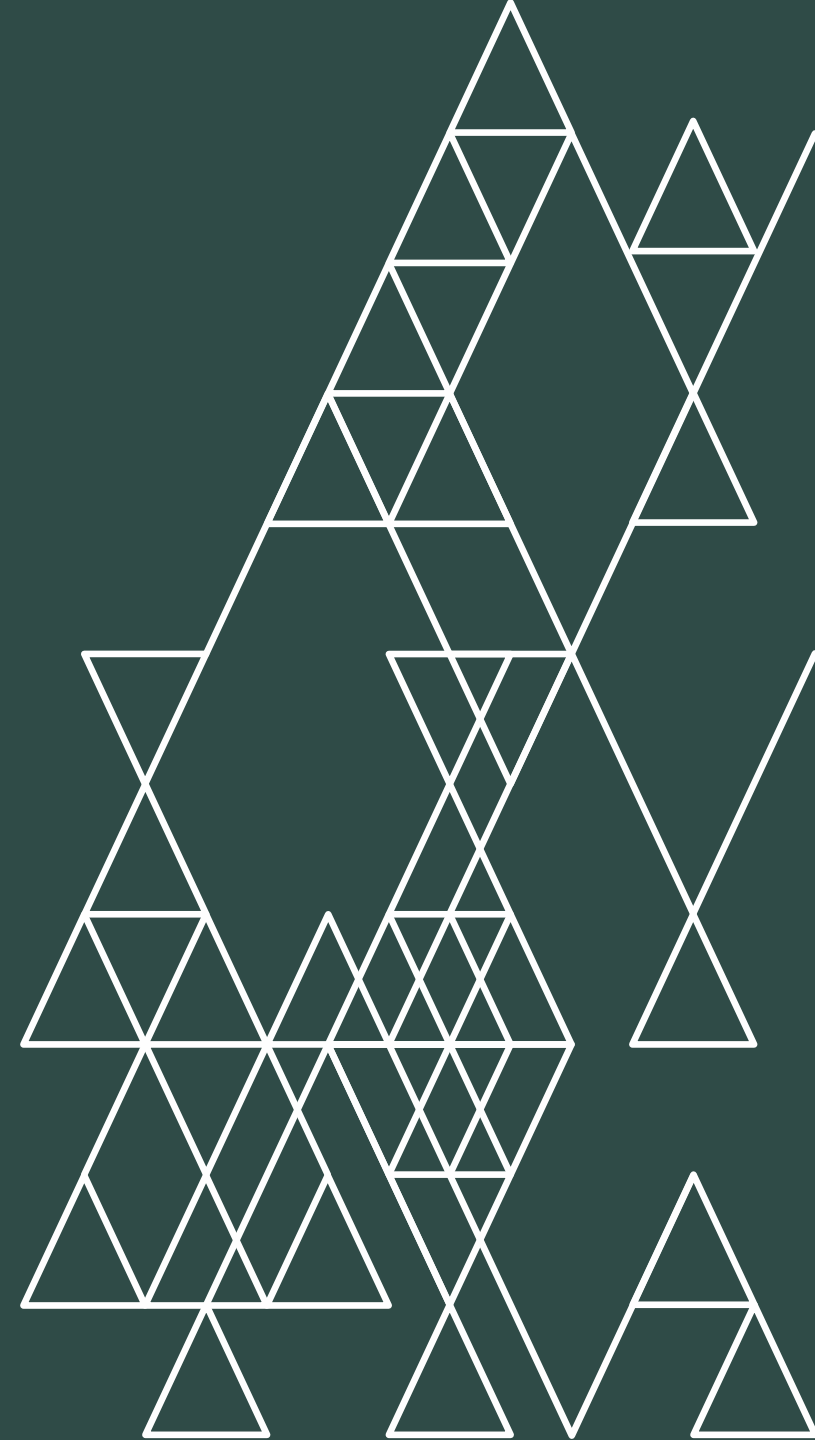
} Hearing from these sources less than they want to.





# Motivations and barriers

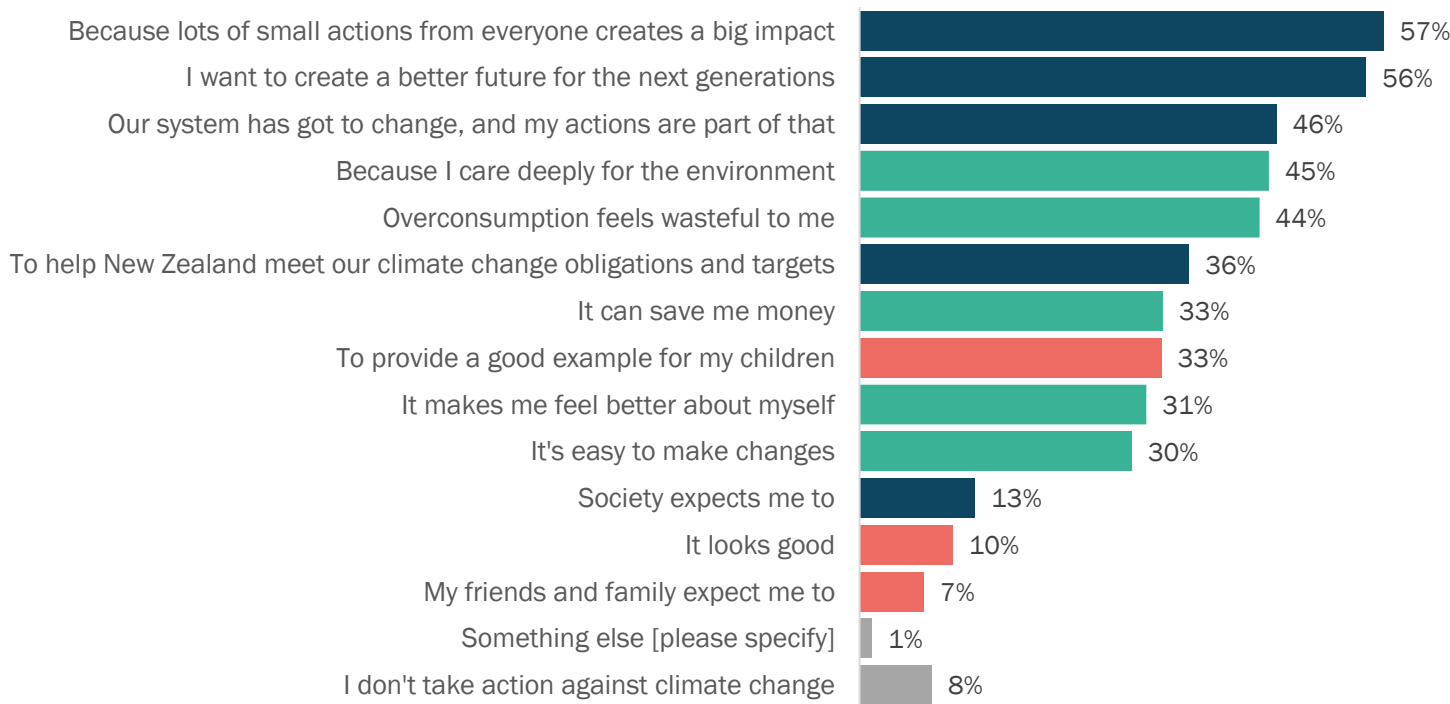
Understanding what encourages people to take climate action, and what gets in the way



# The biggest motivations for taking climate action are at a cultural level

While these are useful motivations, they can be seen as ‘everyone’s responsibility and no-one’s responsibility’

## Climate action motivations



Potentially driving this is the idea that climate change is in its early stages of mainstream cultural psyche – it makes sense to see the cultural motivations strong, as that’s where messaging and activity (including our own) to date has played.



Think about specific actions that you personally take against climate change. Which of the following motivates you to do?

Base: n=774

# Motivations differ by age – older people are thinking of collective good and avoiding waste. Younger people over-index on what others think

## Climate action motivations – by age

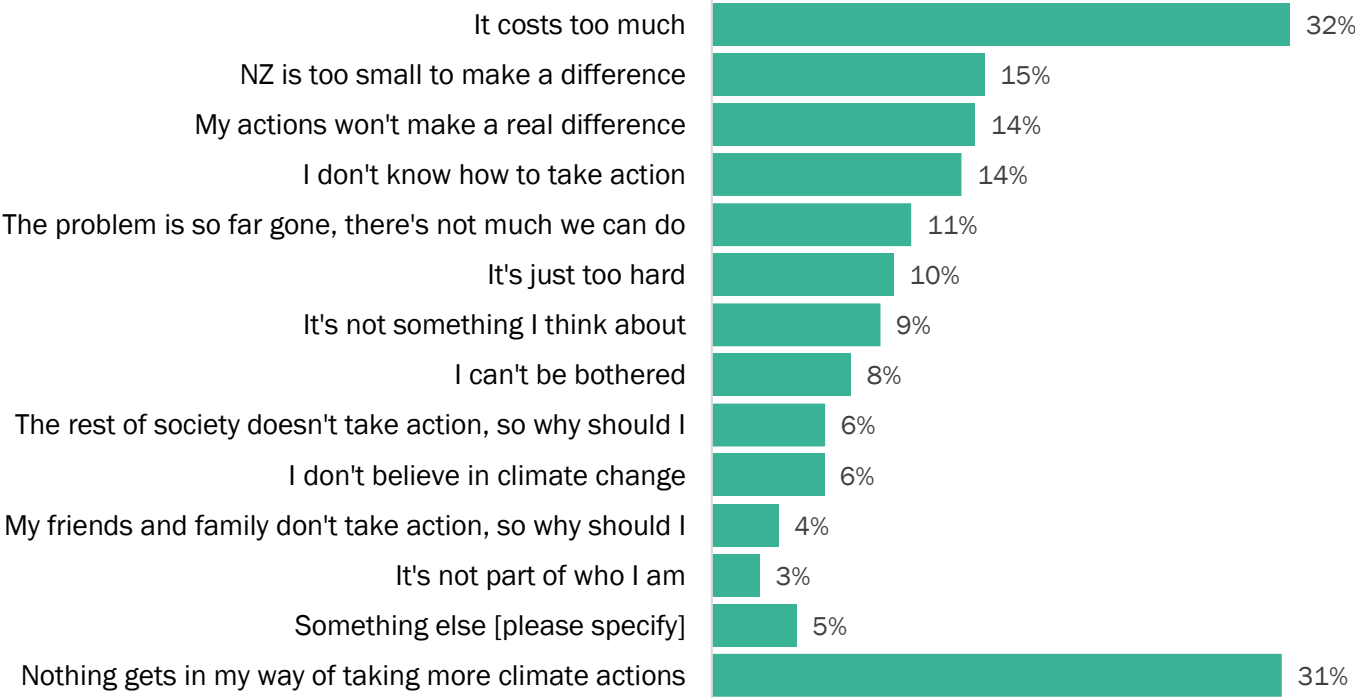
	18-29	30-39	40-49	50+
Because lots of small actions from everyone creates a big impact	48% ▼	49% ▼	52%	67% ▲
I want to create a better future for the next generations	54%	54%	51%	59%
Our system has got to change, and my actions are part of that	41%	42%	49%	49%
Because I care deeply for the environment	42%	39%	51%	46%
Overconsumption feels wasteful to me	35% ▼	38%	42%	51% ▲
To help New Zealand meet our climate change obligations and targets	39%	31%	29% ▼	40% ▲
It can save me money	37%	34%	37%	29% ▼
To provide a good example for my children	22% ▼	40% ▲	42% ▲	32%
It makes me feel better about myself	35%	35%	35%	27% ▼
It's easy to make changes	32%	19% ▼	28%	34% ▲
Society expects me to	13%	15%	8% ▼	13%
It looks good	19% ▲	12%	10%	5% ▼
My friends and family expect me to	14% ▲	6%	6%	4% ▼

**With older New Zealanders more likely to align to system-level motivations – younger New Zealanders more likely to align to social motivations.**



# Nearly a third of people say nothing stops them from taking climate action, but just as many say taking action is expensive

## Climate action barriers



Worth noting, is that many people believe that things such as recycling alone is ‘climate action’. So some of those those who say nothing gets in their way will likely include this group.





# Young New Zealanders have more barriers to acting on climate change

4 in 10 of those 50+ say that nothing gets in their way of taking more climate actions.

## Climate barriers – by age

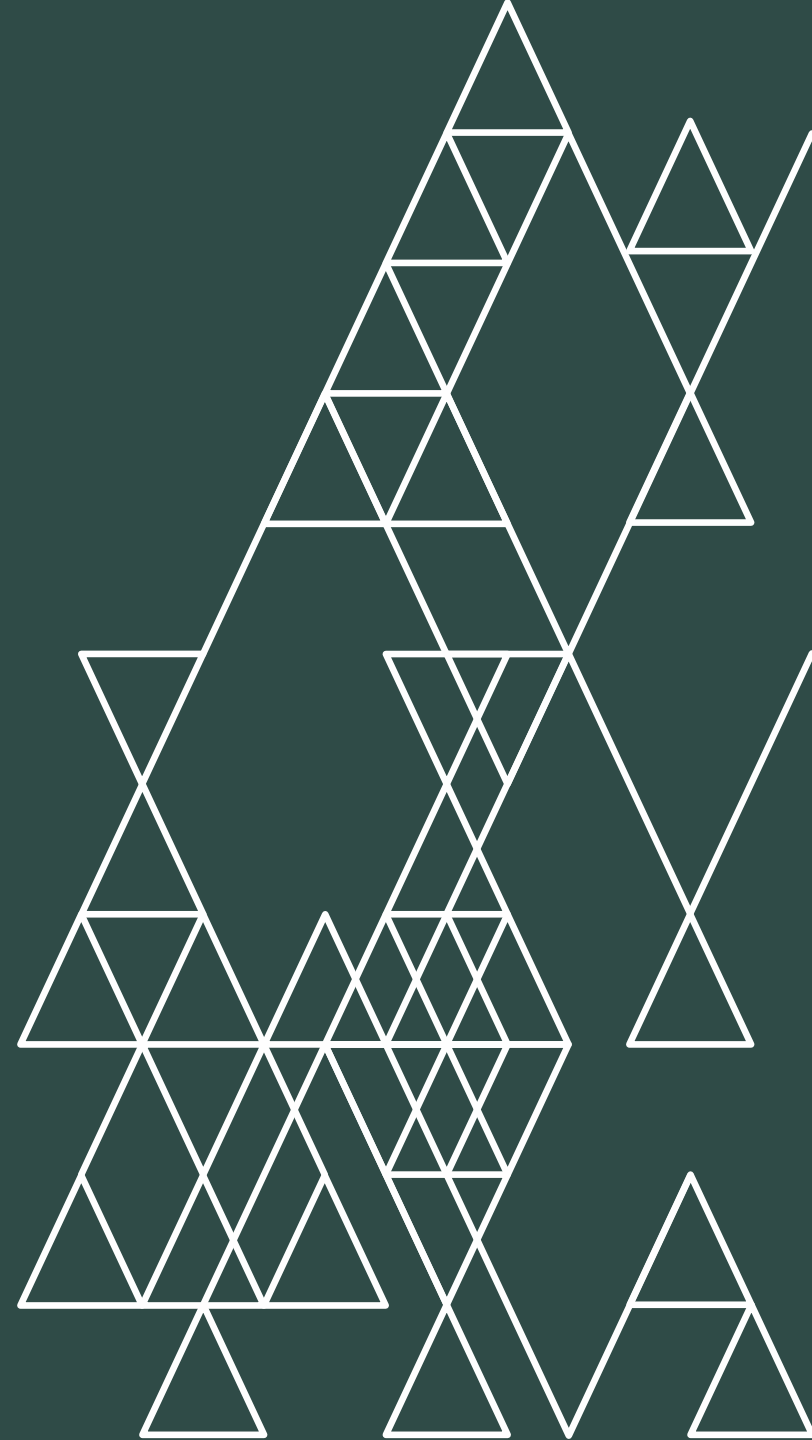
	18-29	30-39	40-49	50+
It costs too much	42%▲	32%	35%	25%▼
NZ is too small to make a difference	18%	13%	10%▼	16%
My actions won't make a real difference	19%▲	18%	11%	12%▼
I don't know how to take action	18%	16%	16%	10%▼
The problem is so far gone, there's not much we can do	16%▲	12%	6%▼	10%
It's just too hard	12%	14%	15%▲	6%▼
It's not something I think about	14%▲	11%	12%	5%▼
I can't be bothered	15%▲	10%	11%	2%▼
The rest of society doesn't take action, so why should I	13%▲	6%	5%	3%▼
I don't believe in climate change	8%	9%	4%	5%
My friends and family don't take action, so why should I	7%▲	5%	4%	1%▼
It's not part of who I am	2%	4%	4%	2%
Nothing gets in my way of taking more climate actions	13%▼	26%	32%	42%▲

Cost in particular is a big barrier for younger New Zealanders.



# Hearts and Minds

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



# Climate actions taken are fairly stable

## Actions taken to reduce your climate change impact - always/almost always

	Q2 FY23	Vs Q1 FY23
Recycled as much as possible	84%	+1%
Chosen energy efficient lights	68%	-2%
Limited my energy use at home	61%	+3%
Chosen energy efficient appliances	59%	+2%
Limited my flights	46%	-2%
Avoided the use of plastic	43%	+4%
Limited my use of petrol or diesel powered vehicles	34%	-1%
Chosen to buy products with a low carbon footprint	30%	0%
Bought organic food	17%	-1%



# But as summer approached, belief in the impact of transport on climate change has softened

And sitting at third on the list of options, there's still a misunderstanding around which actions have the greatest impact.

## Actions perceived as most impactful

	Q2 FY23	Vs Q1 FY23
Recycling as much as possible	59%	4%
Avoiding the use of plastic	46%	2%
Reducing our use of petrol or diesel powered vehicles	38%	-4%
Choosing to buy products with a low carbon footprint [e.g. produced locally or manufactured using renewable energy]	32%	-3%
Choosing energy efficient appliances	24%	1%
Using less energy at home	20%	-2%
Reducing our flights	15%	-4%
Choosing energy efficient lights	15%	-1%
Buying organic food	7%	2%

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

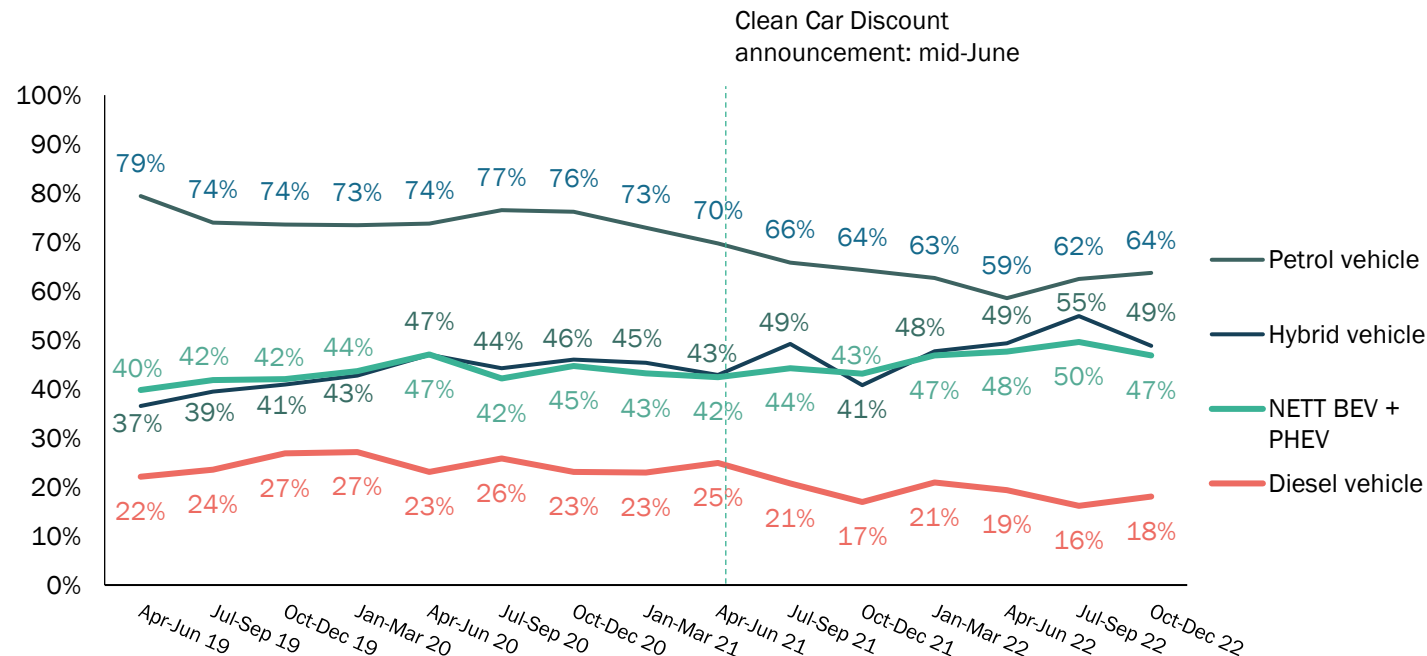




# EV and hybrid vehicle consideration has stabilized after seeing periods of longer-term growth

Consideration for diesel- and petrol-powered vehicles have both seen slight increases.

## Vehicle consideration



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



# 1 in 5 people don't know where to look to find information about how to reduce their emissions – and there isn't much variation by demographics

## Know where to access information about how to measure and reduce personal carbon emissions (disagree/strongly disagree)

Age	%
18-29	16%
30-39	18%
40-49	19%
50+	20%

Region	%
Upper NI	21%
Auckland	16%
Lower NI	23%
Wellington	19%
Other SI	20%
Canterbury	17%

Ethnicity	%
NZ European	20%
Māori	20%
Pasifika	21%
Asian	11%
Other	16%

Gender	%
Male	16%
Female	21%

Segments	%
The Willing	22%
The Busy	10%
The Self Interested	24%
The Complacent	19%
The Unconvinced	18%

Rural	%
NET Urban	19%
NET Rural	21%

How much do you agree/disagree that you know where to access information about how to measure and reduce your personal carbon emissions?

Base Total n=3,013, Base B2B n=564



# Thank you