EECA
TE TARI TIAKI PŪNGAO
ENERGY EFFICIENCY & CONSERVATION AUTHORITY

EECA Consumer Monitor

Quarterly Report Q3 FY23 (January – March 2023)

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.

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.

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.

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

Despite the recent extreme weather events New Zealand has seen, the issue of climate change is still sitting at the bottom of our important issues. As a result, we are not seeing movement across climate beliefs and actions.

Nevertheless, there is a desire among New Zealanders for the country as a whole to act, and to continue making progress against climate change. Our job is to connect Kiwis with the necessary tools and resources required to combat this issue.

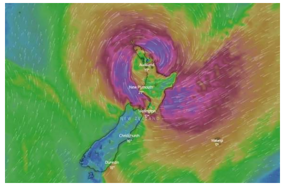
Current New Zealand Landscape

This quarter brought some of the most extreme weather that New Zealand has ever seen

27th January
280mm of rain produced severe flash flooding occurs across Auckland,

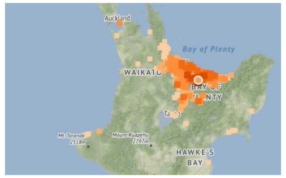
January
January was reported to be Auckland's wettest month ever

12th – 16th February
Cyclone Gabrielle hits New Zealand



25th February
Tornado hits Waihi beach

20th March
Hundreds of minor earthquakes occurred in the Bay of Plenty



Jan - March
Inflation rates hold at 7.2%

Dates survey was live: 20th Jul – 27th Sep

Key:
- ● Significant national/global event
- ▬ Fieldwork dates for collecting survey data

With all that is going on for people at the moment climate change hasn't shifted in importance

As a result, it continues to remain down the list of importance

Importance of issues to New Zealanders – Important/Very important

This quarter we've seen a 4-point increase concerns over transport infrastructure, which is up 6 points since last year.

The weather events over the last year would appear to have impacted this.

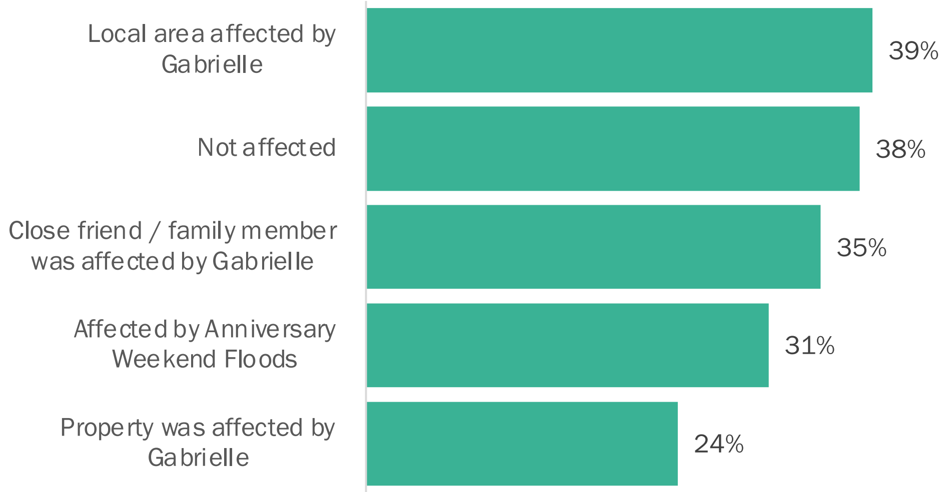
GENERAL_ISSUES How important do you consider each of the following issues to be for New Zealand? NET Important / Very Important.
Base: Total Sample, n=813

Statistically significant change compared to previous quarter

We do see in other data that even these extreme events don’t always relate to an increased commitment to act

Source: Kantar Better Futures

Those affected by weather events who do NOT see ‘Extreme Weather Events’ as an issue of concern



Changes in commitment to living a sustainable lifestyle year on year

Top three box (T3B)

9% — Increase in T3B commitment *without* extreme weather events

8% — Increase in T3B commitment *in response* to weather events

When seasonally adjusted for time of year trends there was no change in the metrics.

EECA TE TARI TIAKI PŪNGAO

Source: Kantar Better Futures 2023

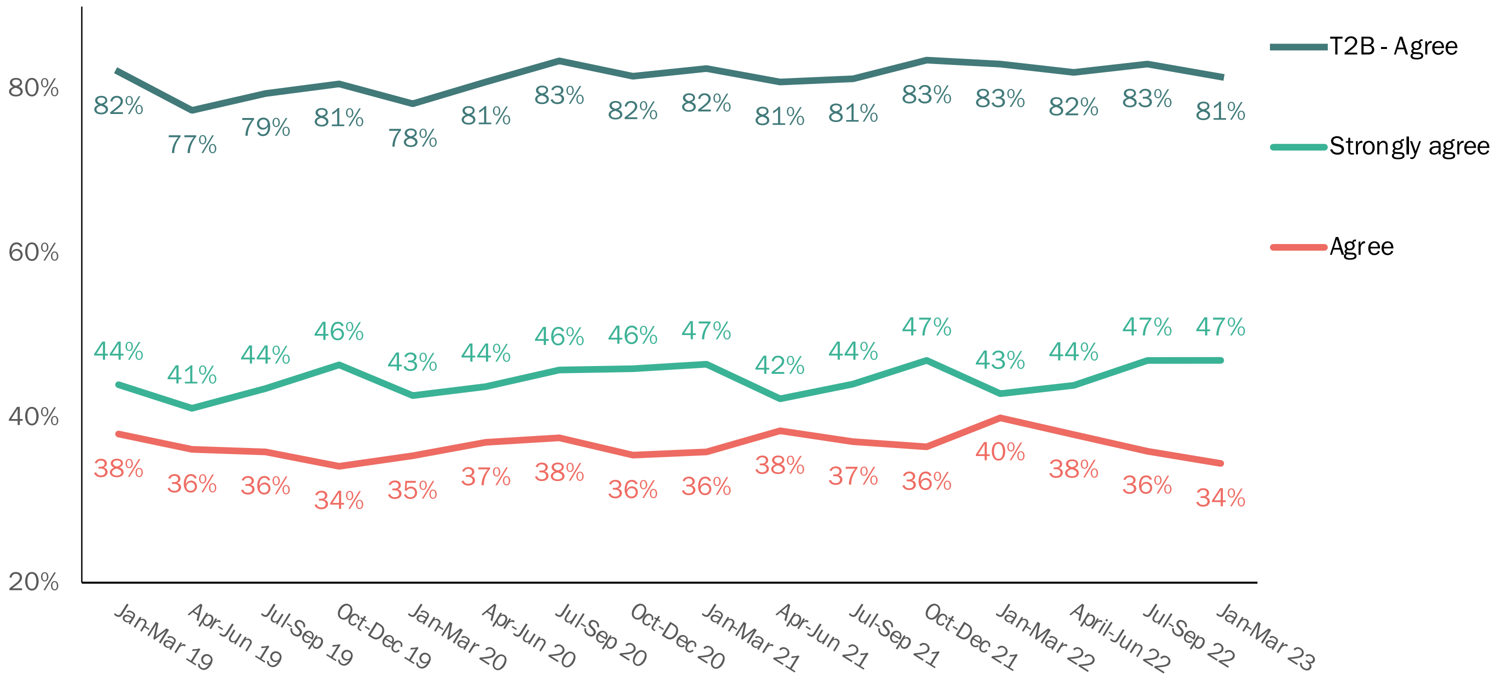
Hearts and Minds

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

We know climate change beliefs are firmly held – they don't change because of events

As a result, we are seeing little movement this quarter

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



CLIMATE_BELIEFS Climate change is real. Base: Total Sample n=726

Statistically significant change compared to previous quarter

And while 3 in 4 people have belief in the need to change, overall need to take action is fairly stable

There is a significant decrease in the need to personally make changes in our energy use.

Climate Beliefs (Agree/Strongly Agree)

		Vs Q1 FY23
Climate change is real	81%	-1%
Businesses need to do more to reduce their impact on the environment	81%	=
Governments should provide incentives to encourage behaviours that protect the environment	80%	+3%
We'll have to change how we live because of climate change, but these changes can be positive	74%	-3%
The Government needs to do more to help reduce New Zealand's impact on the environment	71%	-1%
I can make a personal difference to the environment	71%	-2%
I am prepared to change my own personal behaviour in order to reduce climate change	71%	-3%
We need to make changes to our energy use to address climate change, even if it means a change to our current lifestyle	66%	-5% ▼
I'm doing all I can to reduce my environmental impact	63%	+2%
The energy choices I make are helping New Zealand meet its climate change goals	59%	-4%
It's hard to reduce your environmental impact without reducing your quality of life	42%	+1%

We have seen movement among Aucklanders when monitoring month by month. The month of the floods had small data spikes, but these are insignificant rises and have since decreased again.

CLIMATE_BELIEFS. How much do you agree or disagree with below statements? (Agree / Strongly Agree)
Base Total: n=726

Statistically significant change compared to previous quarter ▲▼

The net effect of all of this – no change in our actions

Actions taken always/almost always

		Vs Q2 FY23
Recycled as much as possible	84%	=
Chosen energy efficient lights	72%	+4%
Chosen energy efficient appliances	61%	+2%
Limited my energy use at home	57%	-4%
Limited my flights	50%	+4%
Avoided the use of plastic	45%	+2%
Limited my use of petrol or diesel powered vehicles	38%	+4%
Chosen to buy products with a low carbon footprint (e.g. produced locally or manufactured using renewable energy)	31%	+1%
Bought organic food	20%	+3%

Again, we saw small movements among Aucklanders in February, but these have since stabilised.

CLIMATE_ACTIONS. Which of the following actions do you take in order to reduce your climate change impact? (Always / Almost Always); Base: n=584

Statistically significant change compared to previous quarter

And no change in which actions are perceived as most impactful

Actions perceived as most impactful

		Vs Q2 FY23
Recycling as much as possible	55%	-4%
Avoiding the use of plastic	43%	-3%
Reducing our use of petrol or diesel powered vehicles	40%	3%
Choosing to buy products with a low carbon footprint (e.g. produced locally or manufactured using renewable energy)	34%	2%
Choosing energy efficient appliances	26%	2%
Reducing our flights	19%	4%
Using less energy at home	18%	-2%
Choosing energy efficient lights	15%	1%
Buying organic food	5%	-2% ▼

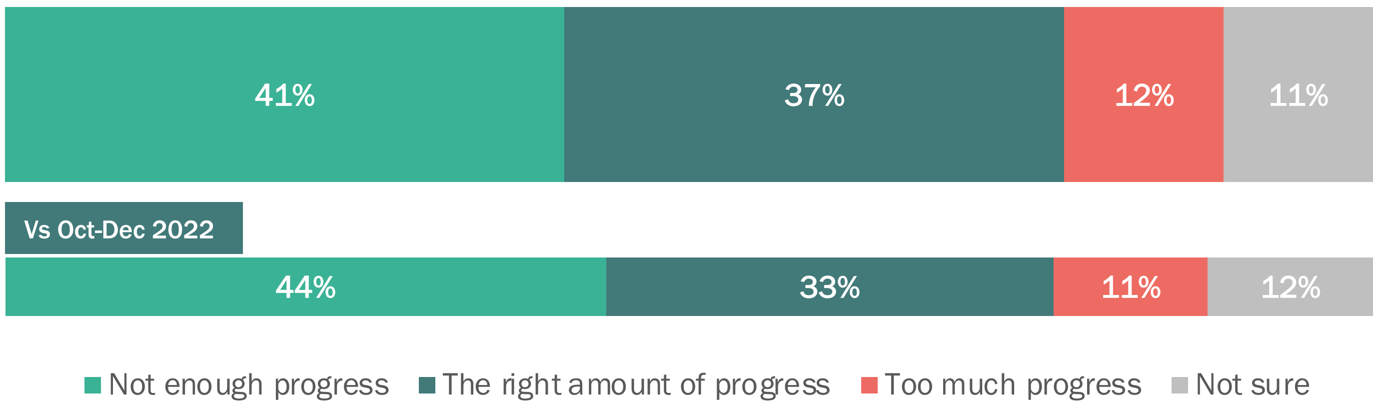
CLIMATE_EFFECT_NEW - Which of these actions do you think would have the greatest impact on reducing climate change, if done by all New Zealanders? (Top 3) Base: n=813

Statistically significant change compared to previous quarter ▲▼

Even after little movement in our beliefs, there is still appetite for New Zealand to continue taking action against climate change

With just under half the sample believing that New Zealand is not making the right amount of progress

New Zealand Progress – taking action against climate change



Profile of those that believe we are not making enough progress:

- Under-indexes in the 50-74 age group

Profile of those that believe we are making the right amount of progress:

- Over-indexes in the 30—39 age group

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

Base: n=522

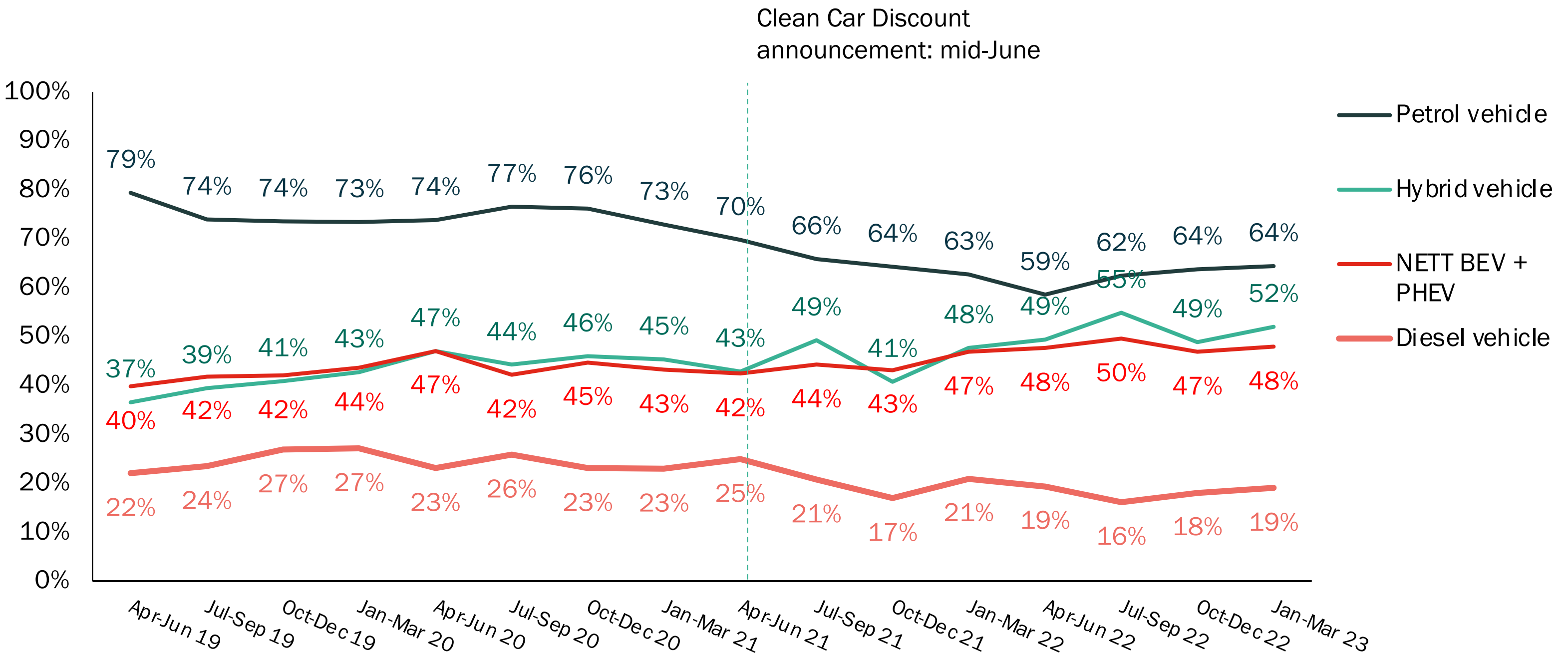
Statistically significant change compared to previous quarter

Transport

Despite an all-time high in EV registrations, we are not seeing growth in consideration in the total market

The gap between hybrid and petrol consideration is sitting at 8 points.

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=774

Statistically significant change compared to previous quarter

We are seeing shifts in perceptions of EV being cheaper to run

A change mostly seen within the Unconvinced. We know this is a key benefit among EV owners, so how can we get this message across to drive greater consideration?

EV Benefits

	Jan-Mar 23	Gap vs last quarter
They produce less air pollution	63%	-3%
They can be charged at home	59%	1%
They are quiet when driving	57%	3%
They produce fewer greenhouse emissions	54%	0%
They can be charged independently of petrol companies	45%	2%
They use renewable energy	42%	1%
They're cheaper to run	41% ▼	-9%
They use an innovative technology	38%	1%
They're cheaper to maintain	26%	1%
They accelerate faster than petrol cars	19%	1%
None of the above	10%	3%

Clean Car Discount Awareness

74%

-3% vs last quarter

Which, if any, of the following do you believe are benefits of electric vehicles?
Are you aware of the Clean Car Discount that is designed to make electric vehicles and plug-in hybrid electric vehicles more affordable?
Base: 383-404

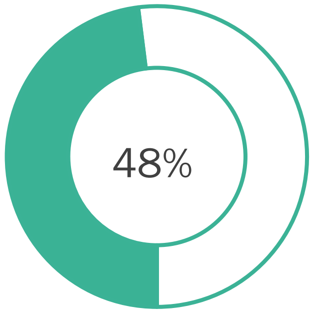
▲▼ Statistically significant difference

Consideration and confidence is stable compared to last quarter

However, we are seeing shift in favourability – with more people viewing them unfavourably

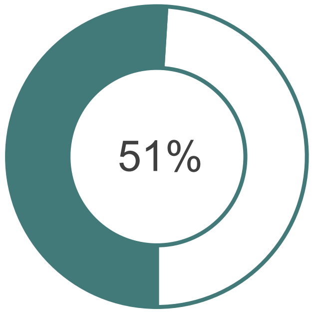
EV Key metrics

BEV / PHEV Consideration



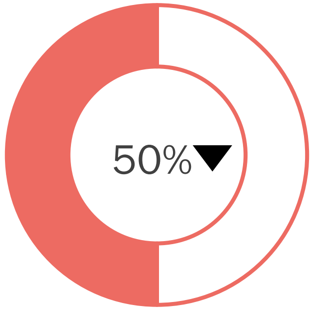
+1 since Q2 FY23

Confidence



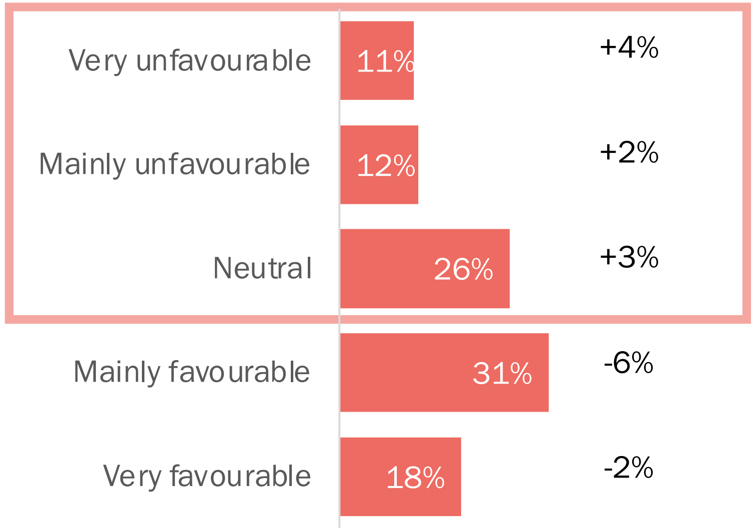
-3 since Q1 FY23

Favourability



-7 since Q1 FY23

Favourability of EVs | **Vs Q1 2022**



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);

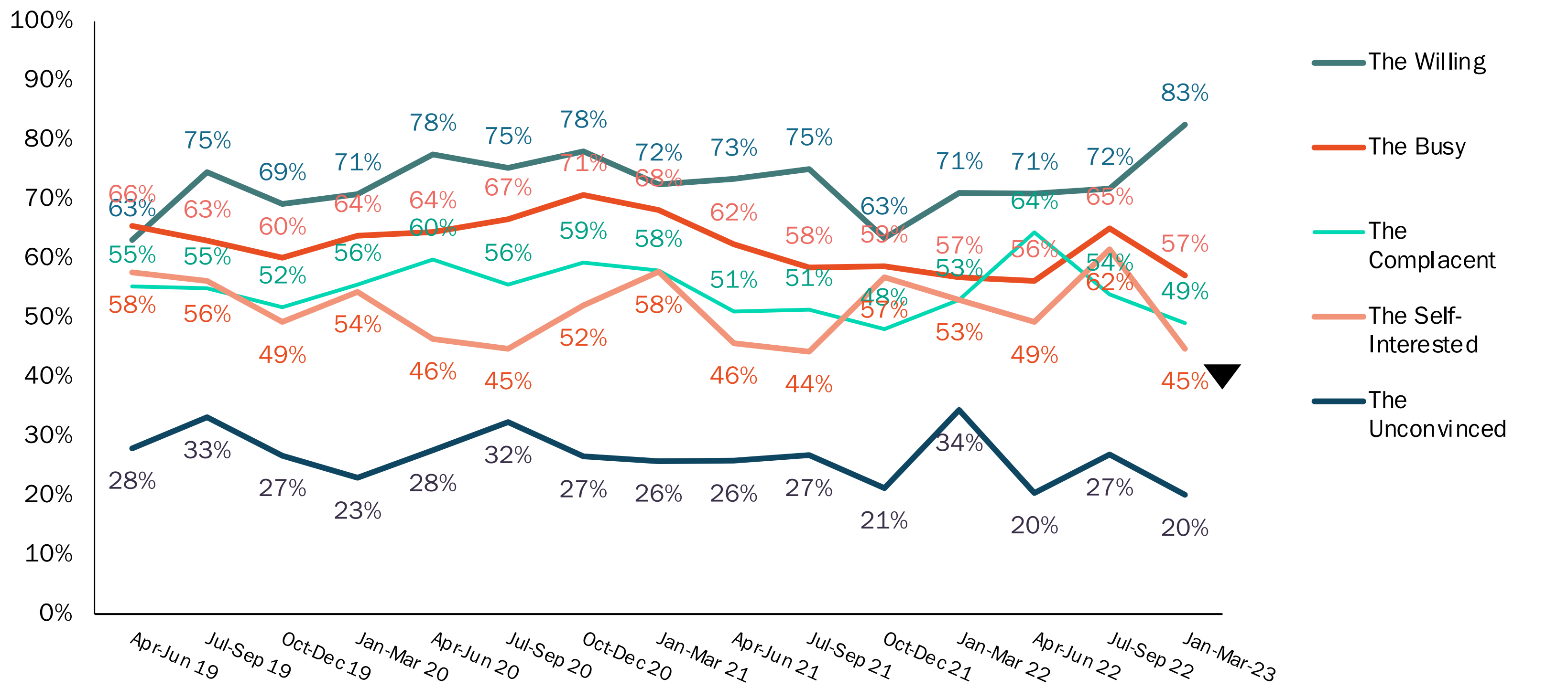
Base: Total Sample – n=404

Statistically significant change compared to previous quarter ▲▼

Favourability is only increasing among those who are more willing to act on climate change

We are not seeing this among those who have more self-interested motivations – ‘The Busy’ and ‘The Self Interested’

EV Favourability by Segments



*Note this question was not asked Oct-Dec 2022

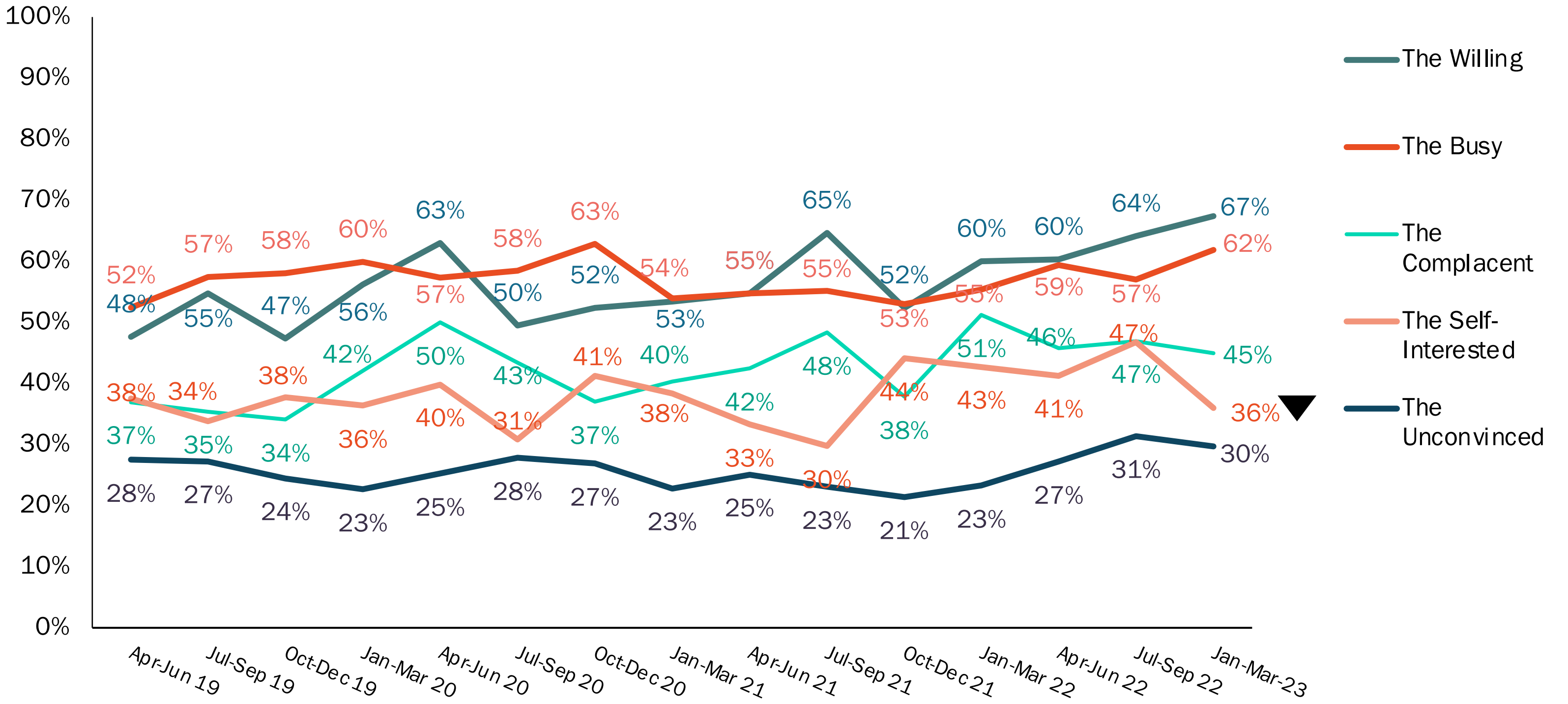
EV4 How favourable or unfavourable is your overall opinion or impression of Electric Vehicles? (NET Mainly / Very Favourable

Base: Jan-Mar 2023 Total Sample – n=404, The Willing n=52, The Busy n=94, The Unconvinced n=60, The Complacent n=106, The Self-Interested n=92

Statistically significant change compared to previous quarter

There are some upward trends among EV consideration, with the exception of the Self-Interested

EV Consideration by Segments



*Note this question was not asked Oct-Dec 2022

VEHICLE_TYPE_CONSIDER. There are a number of different types of vehicles currently being sold in New Zealand. Thinking - TOP 2 BOX LIKELY

Base: Jan-Mar 2023 Total Sample – n=774, The Willing n=99, The Busy n=197, The Unconvinced n=165, The Complacent n=203, The Self-Interested n=110

Statistically significant change compared to Q1 FY23

Thank you