

# EECA Consumer Monitor

Edition 1: July-September 2021

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 600 New Zealand businesses, sampling business decision makers who are responsible for energy, transport or HR 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 insight agency that combines understanding of human behaviour with intelligent data capability to help clients navigate uncertainty and answer complex problems.

# Overview

There is real and urgent need to mobilise New Zealanders around climate change – and particularly the impact that each New Zealander can have.

One in five New Zealanders don't agree that climate change is real.

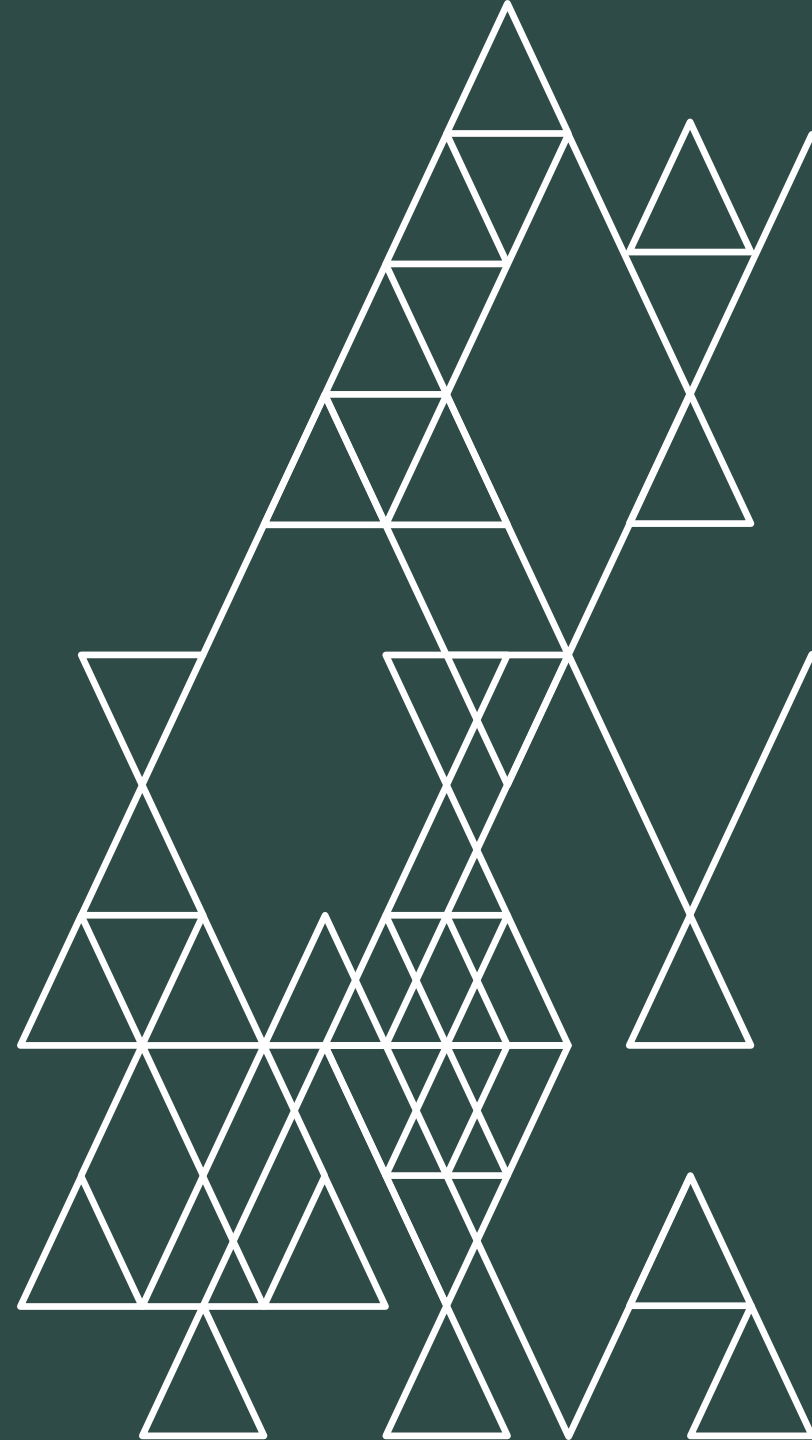
But the real focus needs to be on what actions New Zealanders can take. Currently only four in ten New Zealanders believe that they could do more to reduce their climate impact.

The link New Zealanders make between their energy choices and meeting our climate change goals appears to be weakening. Knowledge of *what* to do remains a key barrier; there is confusion on which actions have most impact on reducing climate change emissions.

Many believe that recycling is a key answer to solving climate change. Eighty-four percent state this as their most common climate action, compared with higher impact, energy-reducing actions such as driving less (34%) or purchasing products with a low carbon footprint (33%).

Most New Zealanders do feel pressure to act on climate change - three-quarters feel some sort of societal pressure to reduce their climate impact, and around half feel this closer to home – from friends and family. We need to give them the tools and knowledge to act on this pressure.

# Current New Zealand Landscape



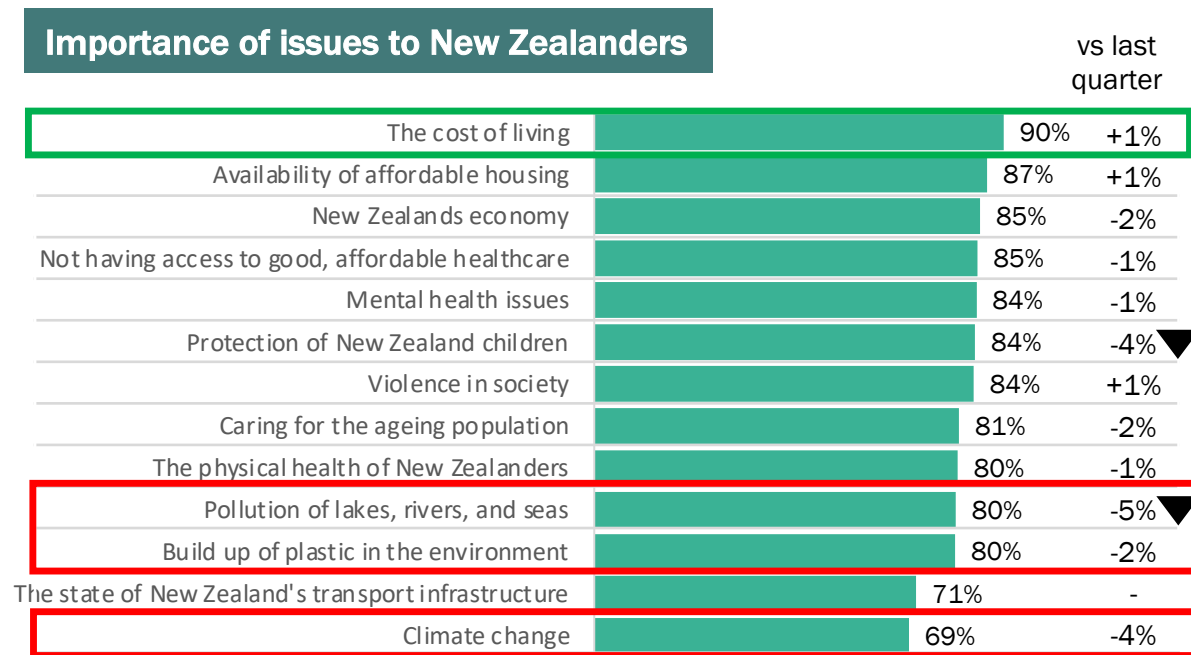
# The context of the last six months as told by key stories...

COVID-19, policy changes and natural disasters are the key media stories in the last six months.



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

# Climate change is slipping down the agenda as an important issue for New Zealanders



This quarter, we also saw a significant decrease in concern about pollution of lakes, rivers and seas.

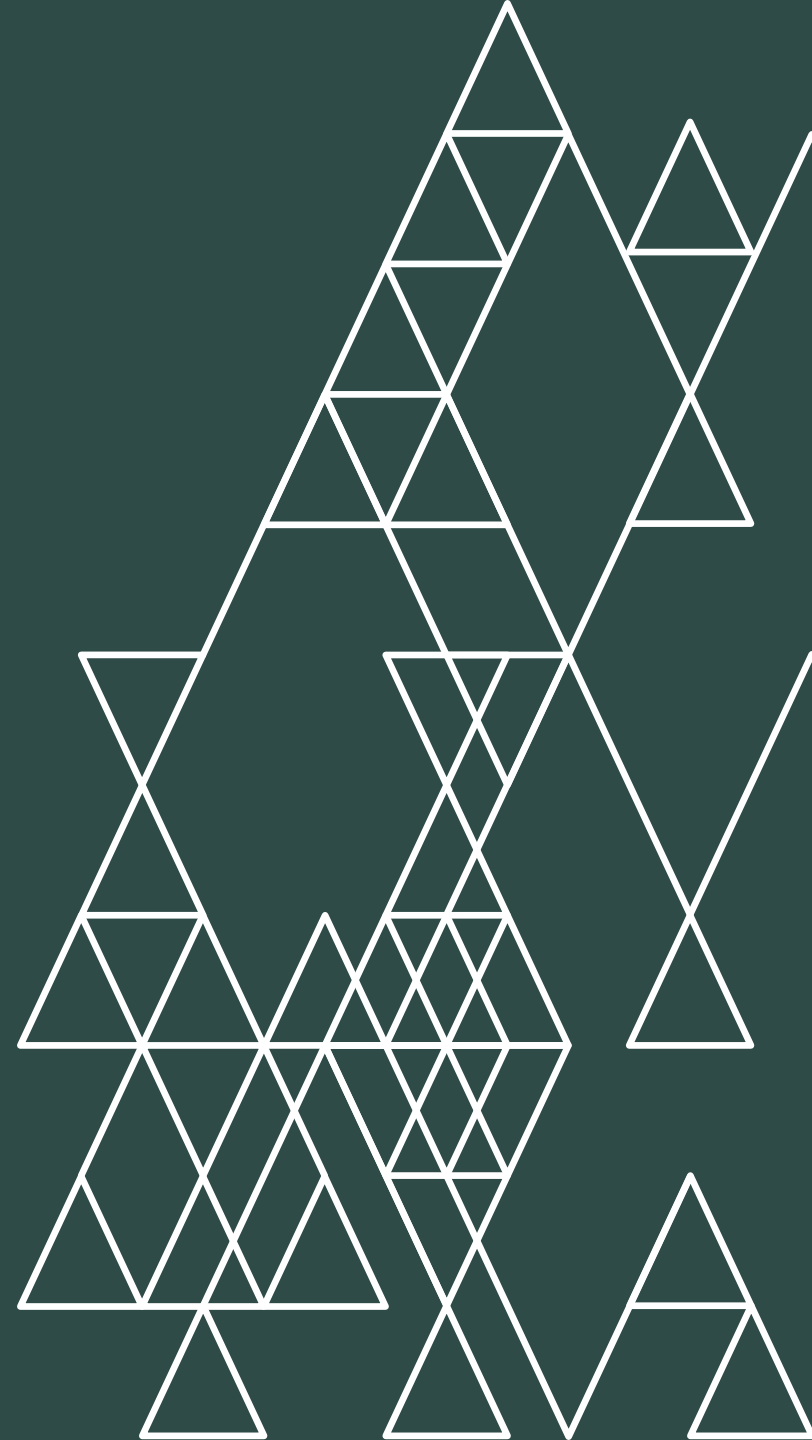
With 69% of New Zealanders seeing climate change as an important national issue, this is the first time in three years this result has dipped below 70% and significantly lower than the historical average (74%).

There is a lot going on in people's lives, particularly with the COVID-19 resurgence in New Zealand. But this decline does raise issues of people becoming more immune to the problem of climate change.



# Hearts and Minds

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



# One in five New Zealanders do not agree that climate change is real, and only four in ten believe they could do more to reduce their environmental impact

Climate Change Beliefs (Agree/Strongly Agree)		
	Total agree	vs last quarter
Climate change is real	81%	-
I can make a personal difference to the environment	76%	+5% ▲
We'll have to change how we live because of climate change, but these changes can be positive	75%	-2%
Governments should provide incentives to encourage behaviours that protect the environment	75%	-4%
I am prepared to change my own personal behaviour in order to reduce climate change	70%	-1%
The Government needs to do more to help reduce New Zealand's impact on the environment	70%	-3%
We need to make changes to our energy use to address climate change, even if it means a change to our current lifestyle	69%	-3%
I'm doing all I can to reduce my environmental impact	62%	+2%
The energy choices I make are helping NZ meet its climate change goals	57%	-4%
It's hard to reduce your environmental impact without reducing your quality of life	41%	+2%

CLIMATE\_BELIEFS How much do you agree or disagree that... (Agree / Strongly Agree); Base: Total Sample - 3MR (n=754).

Statistically significant change compared to previous quarter ▲



# There is a lack of understanding of which actions have the most impact on reducing climate change

60% think recycling is impactful, compared to only 36% for reducing use of petrol or diesel vehicles

## Actions perceived as most impactful

		vs last quarter
Recycling as much as possible	60%	+5% ▲
Avoiding the use of plastic	51%	+8% ▲
Reducing our use of petrol or diesel powered vehicles	36%	-3% ▼
Choosing to buy products with a low carbon footprint	35%	+5% ▲
Choosing energy efficient appliances	25%	-2%
Using less energy at home	20%	-2%
Choosing energy efficient lights	17%	+1%
Reducing our flights	14%	-6% ▼
Buying organic food	5%	-

## Actions taken regularly

		vs last quarter
Recycled as much as possible	84%	+4% ▲
Chosen energy efficient lights	73%	+4%
Chosen energy efficient appliances	62%	-4%
Limited my energy use at home	60%	-
Avoided the use of plastic	48%	+4%
Limited my flights	47%	-1%
Limited my use of petrol or diesel powered vehicles	34%	+4%
Chosen to buy products with a low carbon footprint	33%	+1%
Bought organic food	19%	+2%

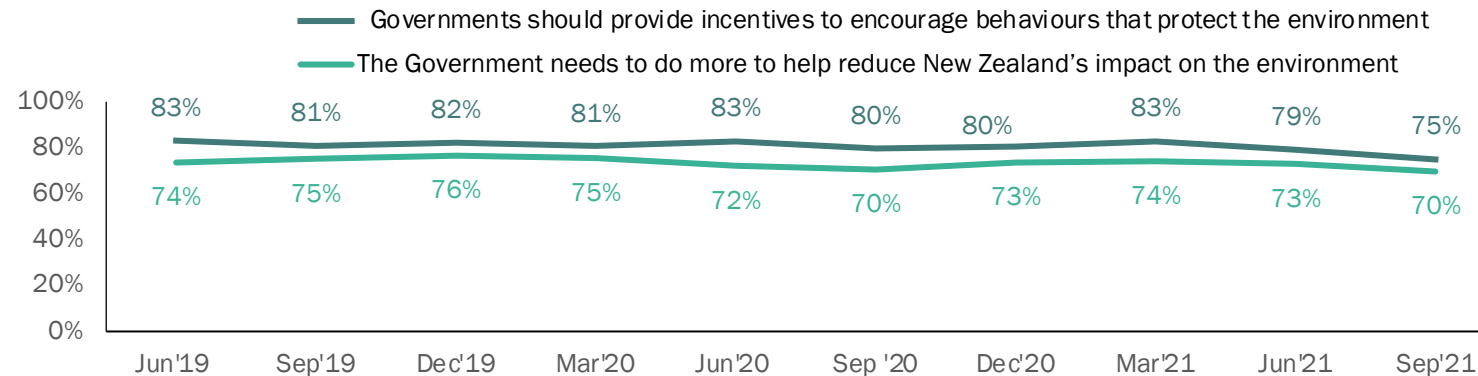
Although the quarterly change for this measure is not statistically significant, it has been trending downwards and represents a significant decrease compared to the same quarter in 2020/21 (43%).

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:** Total Sample - 3MR (n=754).  
CLIMATE\_ACTIONS. Which of the following actions do you take in order to reduce your climate change impact? (Always / Almost Always); **Base:** n=754 New Zealanders.



# The majority of New Zealanders agree that the government needs to do more, but this support is falling

## New Zealanders' level of comfort with institution-led system change (Agree / Strongly Agree)



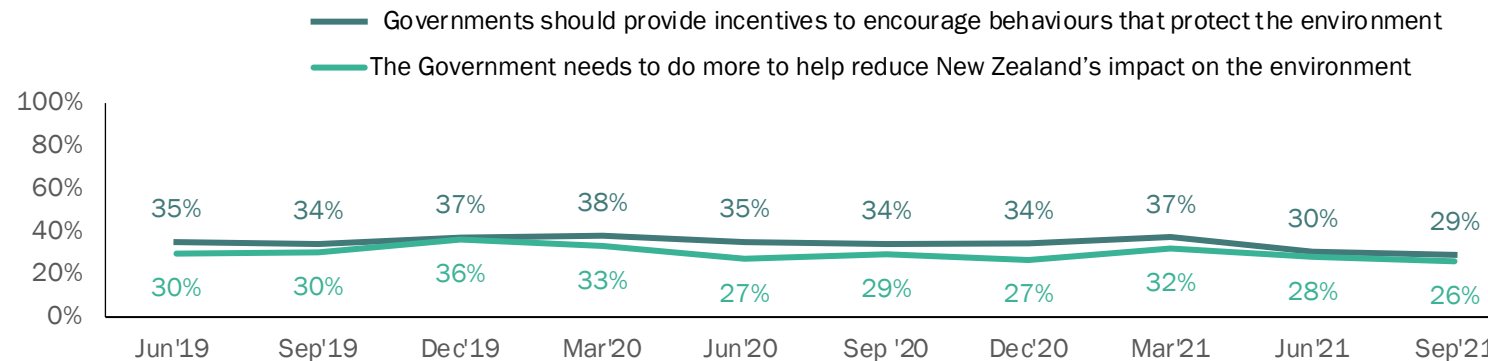
12MR

79%

72%

Overall support for government intervention started falling in June 2021, and this has continued this quarter.

## New Zealanders' level of comfort with institution-led system change (Strongly Agree)



12MR

33%

28%

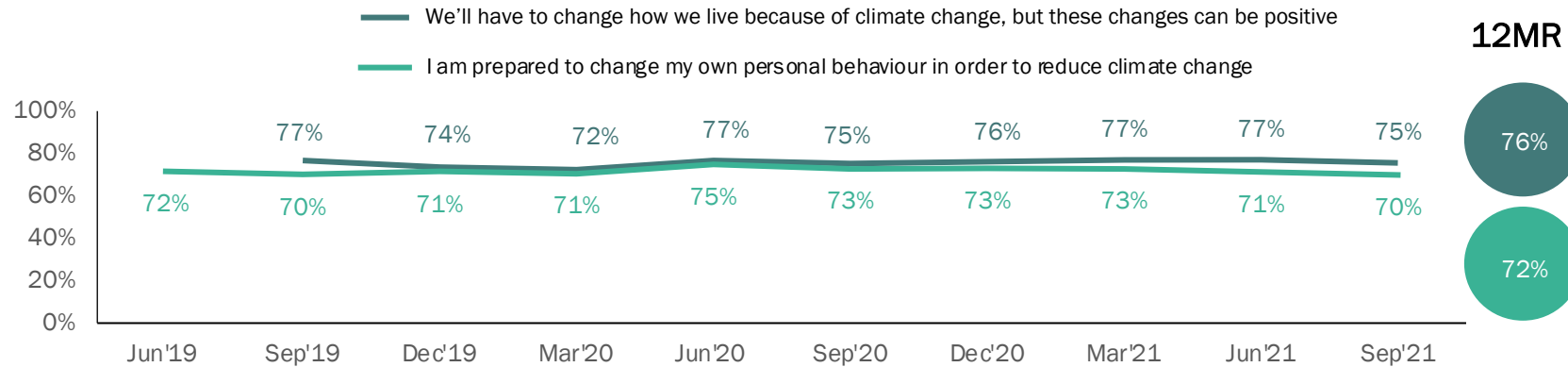
**CLIMATE BELIEFS** How much do you agree or disagree that... Governments should provide incentives to encourage behaviours that protect the environment (Agree / Strongly Agree for the top graph, Strongly Agree for the bottom graph); The Government needs to do more to help reduce New Zealand's impact on the environment (Agree / Strongly Agree for the top graph, Strongly Agree for the bottom graph); **Base:** Total Sample - 3MR (n=754).

Statistically significant change compared to previous quarter

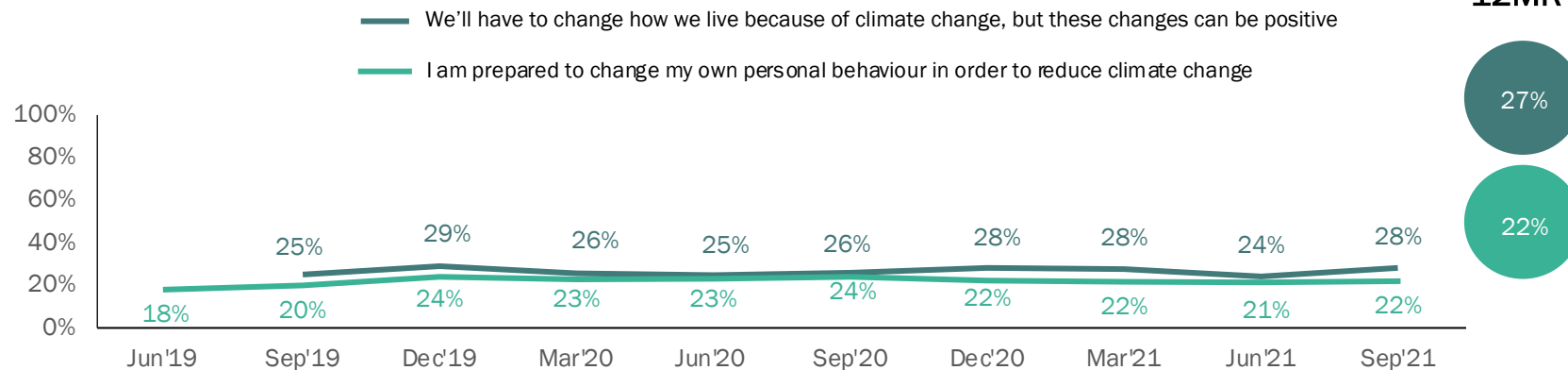


# Nevertheless, willingness to change behaviour holds

## New Zealanders' willingness to participate in change (Agree / Strongly Agree)



## New Zealanders' willingness to participate in change (Strongly Agree)



This quarter the proportion of New Zealanders who strongly agree that we're going to have to change how we live, but that these changes can be positive has recovered, sitting above the historic average of 26%.

**CLIMATE BELIEFS** How much do you agree or disagree that... We'll have to change how we live because of climate change, but these changes can be positive (Agree / Strongly Agree for the top graph, Strongly Agree for the bottom graph); I am prepared to change my own personal behaviour in order to reduce climate change (Agree / Strongly Agree for the top graph, Strongly Agree for the bottom graph); **Base:** Total Sample - 3MR (n=754).

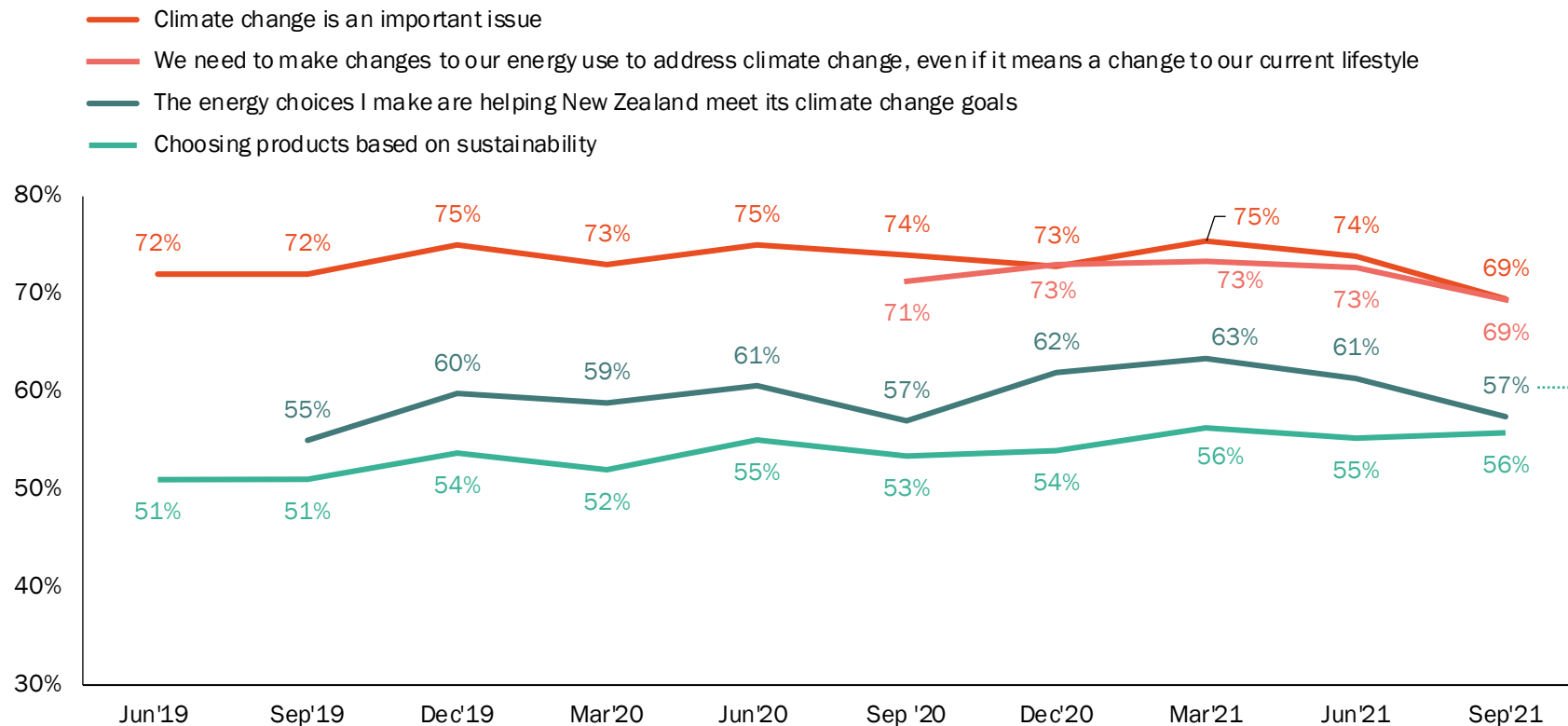
Statistically significant change compared to previous quarter





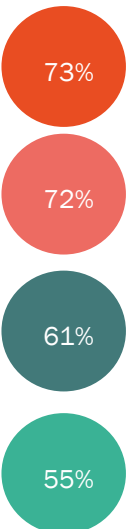
# We need to continually strengthen the link between our energy choices and New Zealand meeting its climate change goals

## Climate Change Beliefs and Behaviours (Agree/Strongly Agree)



Although the quarterly change for this measure is not statistically significant, it is a significant decrease compared to six months ago.

12MR



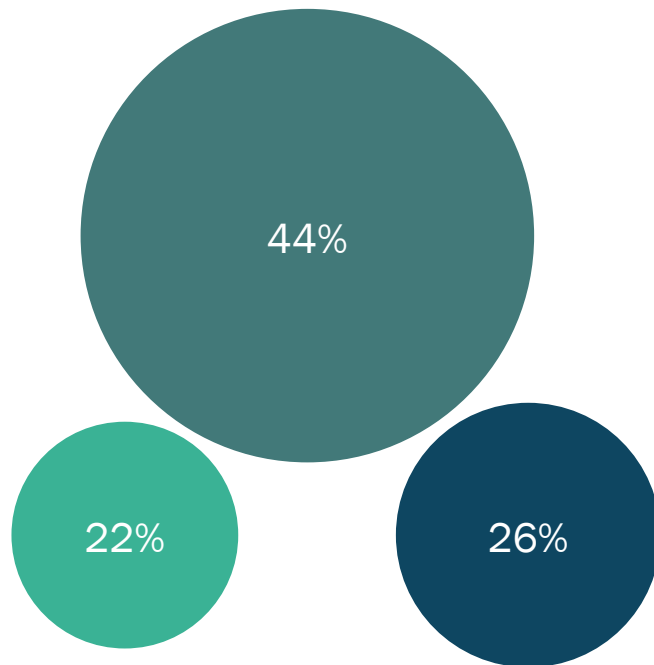
**GENERAL\_ISSUES** How important do you consider each of the following issues to be for New Zealand? Climate change (Important / Very important) **CLIMATE\_BELIEFS** How much do you agree or disagree that... We need to make changes to our energy use to address climate change, even if it means a change to our current lifestyle (Agree / Strongly Agree); The energy choices I make are helping New Zealand meet its climate change goals (Agree / Strongly Agree) **CLIMATE\_ACTIONS** Which of the following actions do you take in order to reduce your climate change impact? Chosen energy efficient lights + Chosen energy efficient appliances + Chosen to buy products with a low carbon footprint (e.g. produced locally or manufactured using renewable energy) (Average Almost always / Always); **Base:** Total Sample - 3MR (n=754).

Statistically significant change compared to previous quarter



# Almost half of New Zealanders lack access, base knowledge and motivation on finding out about how to reduce their carbon emissions

I **know where to access information** about how to reduce and measure my carbon emissions (Agree / Strongly Agree)



I have a **good level of knowledge** about how to reduce my carbon emissions (Rated their knowledge 8-10 out of 10)

I **actively look for information** about how to lower my carbon emissions (Actively / Often Actively)

10%

Selected/Agreed with **all three** of these statements

46%

Selected/Agreed with **none** of the three statements

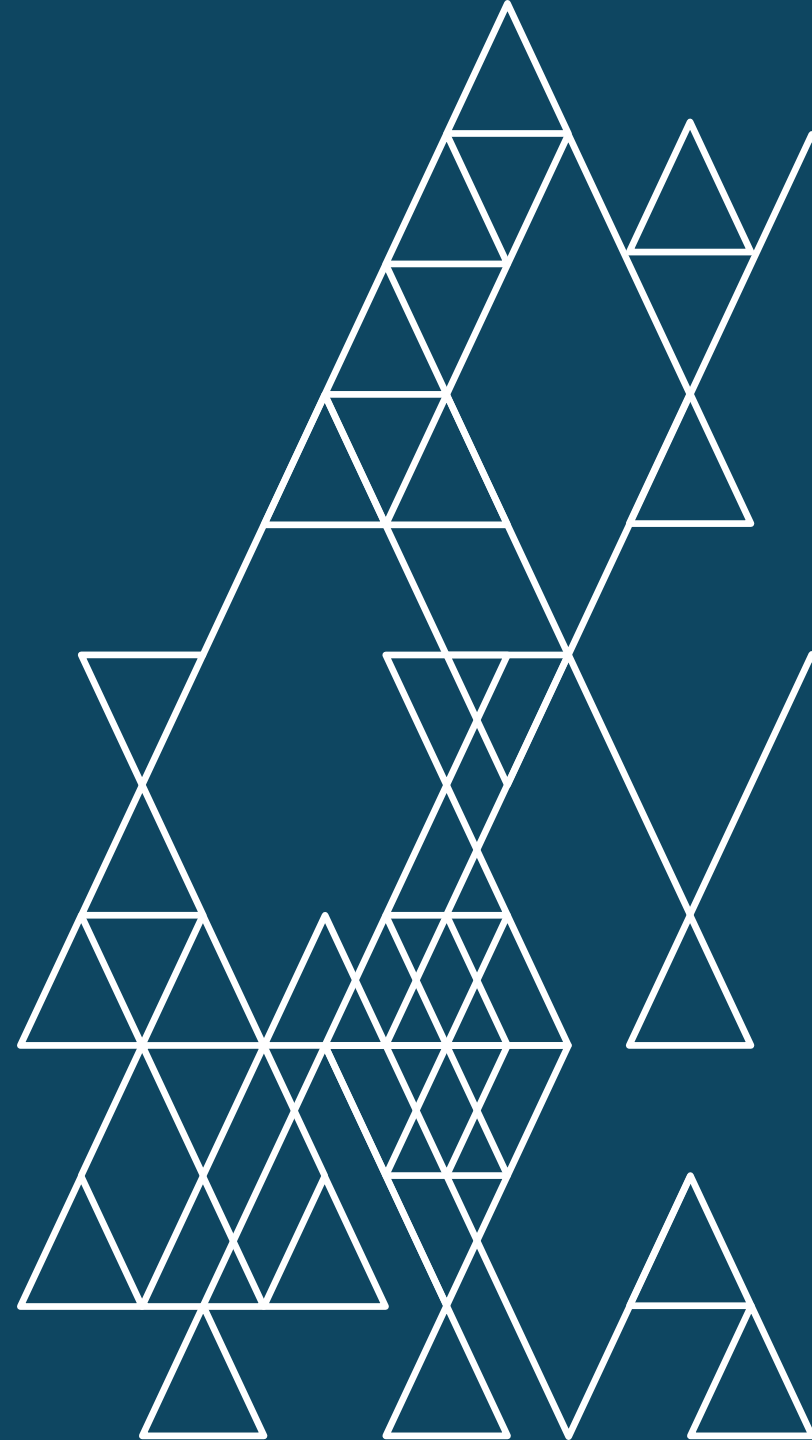
INFO\_RATE: On a scale of 0 - 10, how would you rate your level of knowledge about how you can reduce your carbon emissions? (NET 8-10) INFO\_ABILITY: How much do you agree/disagree that you know where to access information about how to measure and reduce your personal carbon emissions? (NET Agree/Strongly Agree). INFO\_INTEREST: What best describes your level of interest in finding information or advice that can help you lower your carbon emissions? (NET Actively/Often Actively look). Base: 754

With less headspace for climate change and connections between 'energy choices' and 'climate change' weakening, there is more education work to be done.

Belief in climate change is high and stable. New Zealanders are coming around to the idea that we'll need to change our way of life, and can see this as potentially positive and empowering.

But with COVID-19 resurfacing, they're also distracted. Climate change is not an immediate priority, and support for government intervention has diminished.

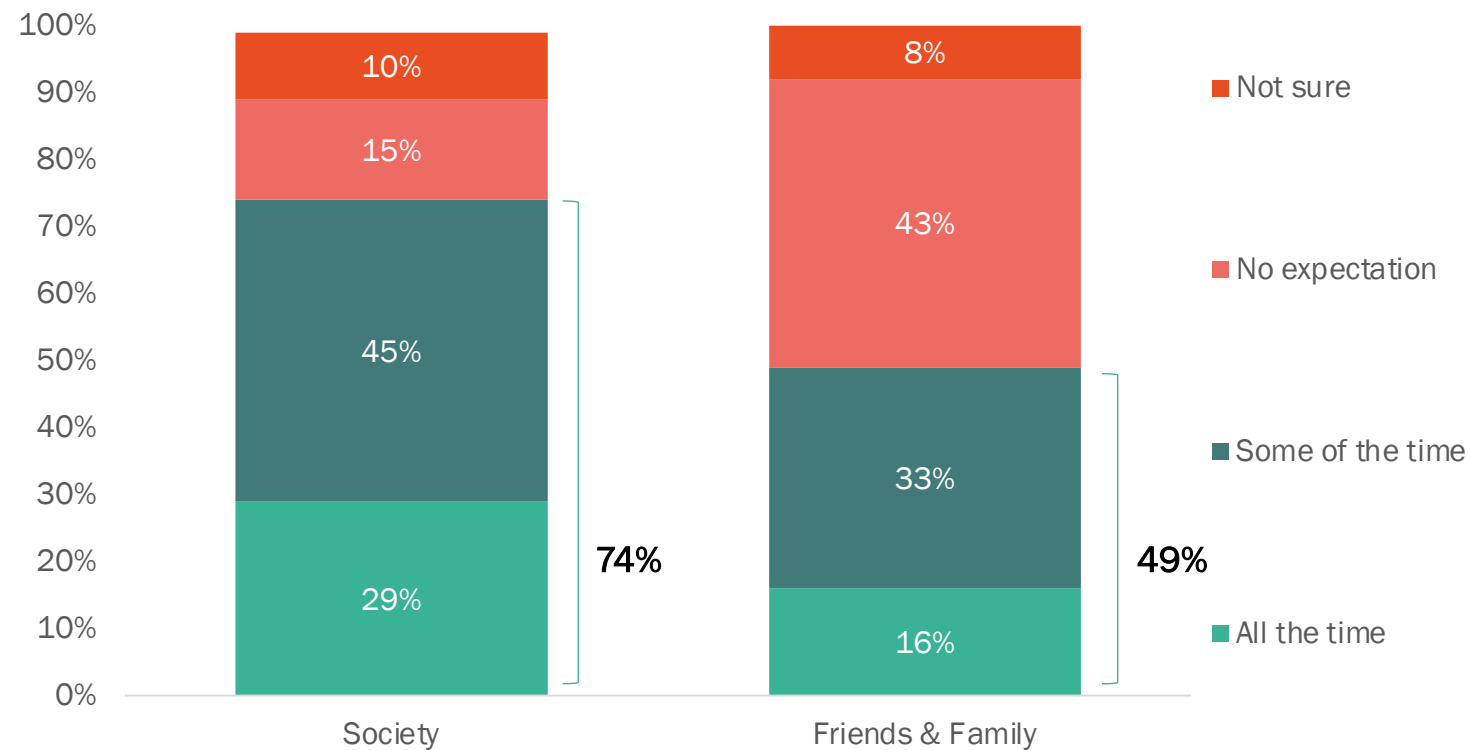
There is a significant group of New Zealanders who don't understand, don't know where to look, and don't care about how to reduce their carbon emissions. This disengagement is a real barrier to changing people's climate actions.





# Nearly three-quarters of people feel some pressure from society to reduce their impact on the climate

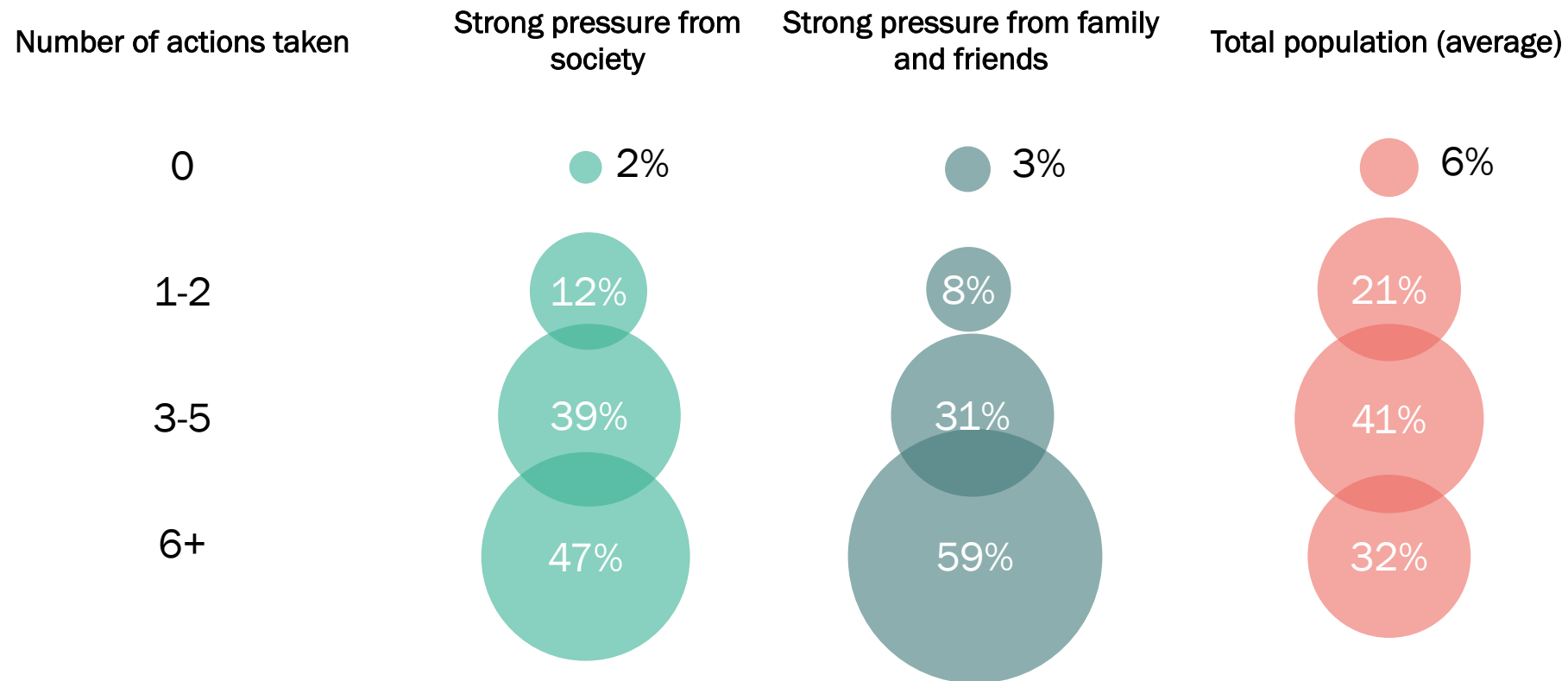
How much do you feel that society/friends and family expects you to make changes to reduce your climate change impact?



Levels of New Zealanders feeling this pressure decreases down to 49% when it comes to expectations from friends and family.

# Social norming influence is important - people who feel pressure to act take more climate change actions

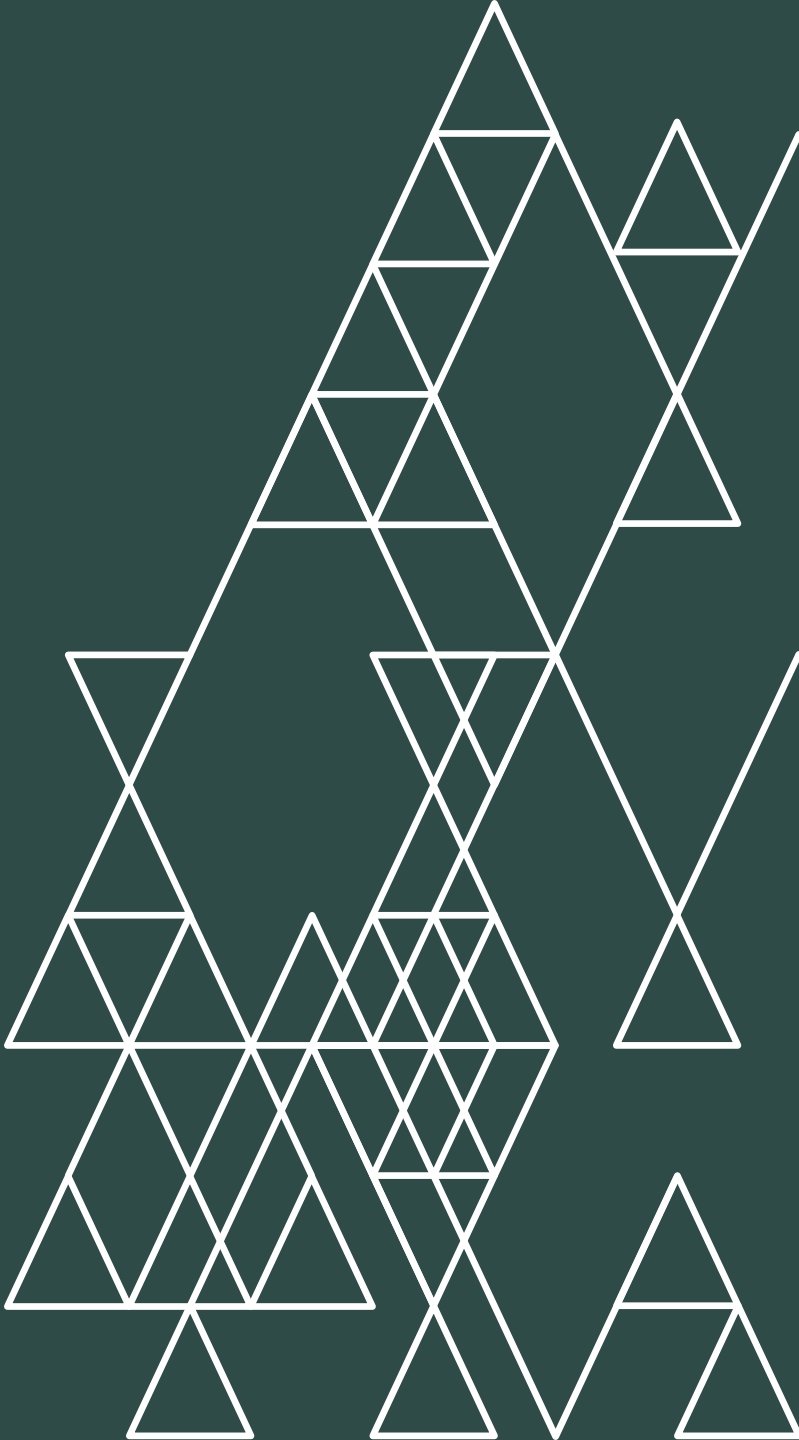
## Number of actions taken by expectation to reduce climate change impact



SOCIAL\_NORM\_SOC: How much do you feel that society expects you to make changes to reduce your climate change impact? SOCIAL\_NORM\_FF: And how much do you feel that your friends and family expect you to make changes to reduce your climate change impact? CLIMATE\_ACTIONS: Which of the following actions do you take in order to reduce your climate change impact? Options: Driving less (in a petrol- or diesel-powered car), Choosing energy efficient lights, Choosing energy efficient appliances, Reducing air travel, Buying products with a low carbon footprint, I take steps to minimise my energy use at home, Recycled as much as possible, Avoided the use of plastic, Bought organic food. Base: n=754 New Zealanders.

EECA

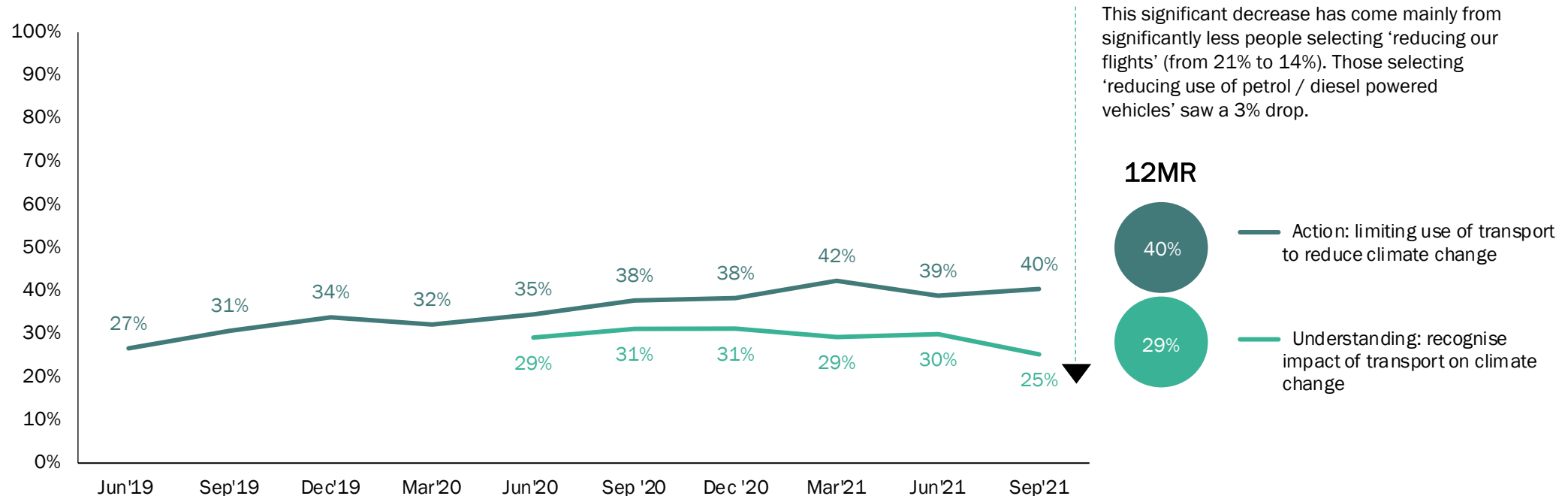
Transport





# Only 25% of people understand that transport is one of the biggest contributors to climate change in New Zealand

## Climate Change Actions and Knowledge of Impact



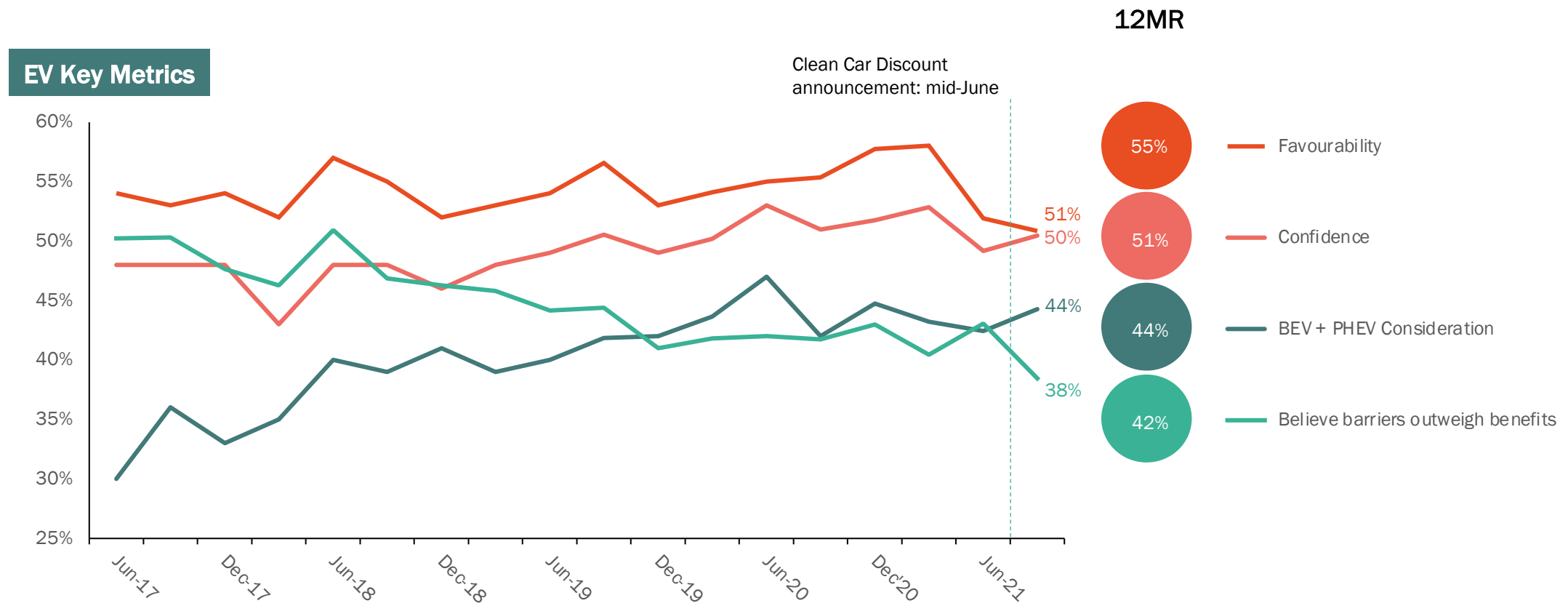
**CLIMATE\_EFFECT\_NEW** Which of these actions do you think would have the greatest impact on reducing climate change in New Zealand? (Top 3) Average Reducing our flights + Reducing our use of petrol or diesel powered vehicles.

**CLIMATE\_ACTIONS.** Which of the following actions do you take in order to reduce your climate change impact? Average Limited their flights + Limited their use of petrol or diesel powered vehicles – Almost/Almost Always  
**Base:** Total Sample - 3MR (n=754).



# It is too early to see major shifts in EV consideration post the Clean Car Discount announcement – but early indications are favourable

After a significant fall last quarter, EV favourability is stable. Confidence and consideration are also stable, while barriers see a 5 percentage point drop.

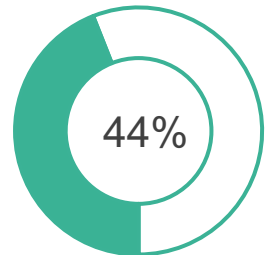


**EV4** How favourable or unfavourable is your overall opinion or impression of Electric Vehicles? (NET Mainly / Very Favourable); **EV5** To what extent are you confident that Electric Vehicles can meet your needs? (NET Somewhat / Very Confident); **Q177** Thinking about your next vehicle purchase, how likely are you to consider the following vehicles? (NET BEV / PHEV); **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? (NET 5-7); **Base:** Total Sample - 3MR (n=754/ 356).

# EV key metrics on a page

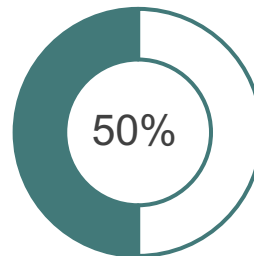
## EV Key Metrics

### BEV / PHEV Consideration



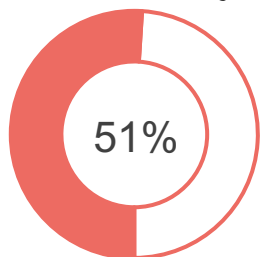
+2 vs last quarter

### Confidence



+1 vs last quarter

### Favourability



-1 vs last quarter

## EVs – Top 5 Benefits

1. They produce less air pollution
2. They produce fewer greenhouse emissions
3. They can be charged at home
4. They're quiet when driving
5. They're cheaper to run

## EVs – Top 5 Barriers

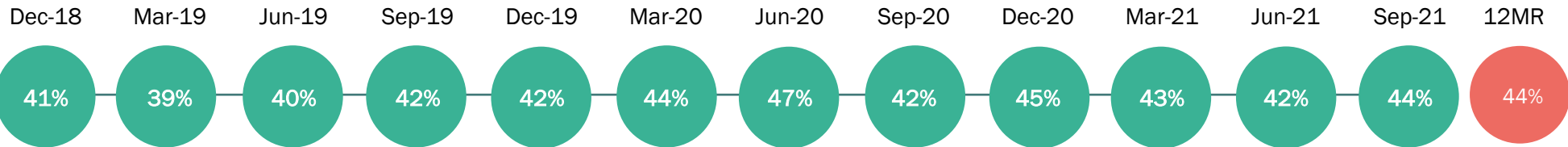
1. They are not available at an affordable price
2. Uncertainty about the battery life and replacement
3. They have a driving range that is not suitable for long distance travelling
4. There are not enough public chargers available
5. It takes a long time to charge them

**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); **Q178**. What is it about electric vehicles that would make you likely to consider them the next time you buy a vehicle? **Q179**. What is it about electric vehicles that would make you unlikely to consider them the next time you buy a vehicle? **Base:** n=709/ 379 New Zealanders.



# We're continuing to see consideration shift away from petrol/diesel and towards hybrid vehicles

## Somewhat / Very Likely to Consider



	Dec-18	Mar-19	Jun-19	Sep-19	Dec-19	Mar-20	Jun-20	Sep-20	Dec-20	Mar-21	Jun-21	Sep-21	12MR
Battery EV	33%	33%	32%	34%	33%	34%	37%	35%	34%	36%	33%	32%	
Plug-in Hybrid	33%	31%	30%	36%	35%	38%	40%	35%	38%	37%	35%	38%	
Hybrid vehicle	36%	36%	37%	39%	41%	43%	47%	44%	46%	45%	43%	49%▲	
Petrol vehicle	75%	73%	79%	74%	74%	73%	74%	77%	76%	73%	70%	66%	
Diesel vehicle	24%	24%	22%	24%	27%	27%	23%	26%	23%	23%	25%	21%	

Q177 How likely are you to consider the following vehicles? (NET Somewhat / Very Likely); **Base:** Current / intended car owners – 3MR (n=709).

Statistically significant change compared to Jun-21 quarter

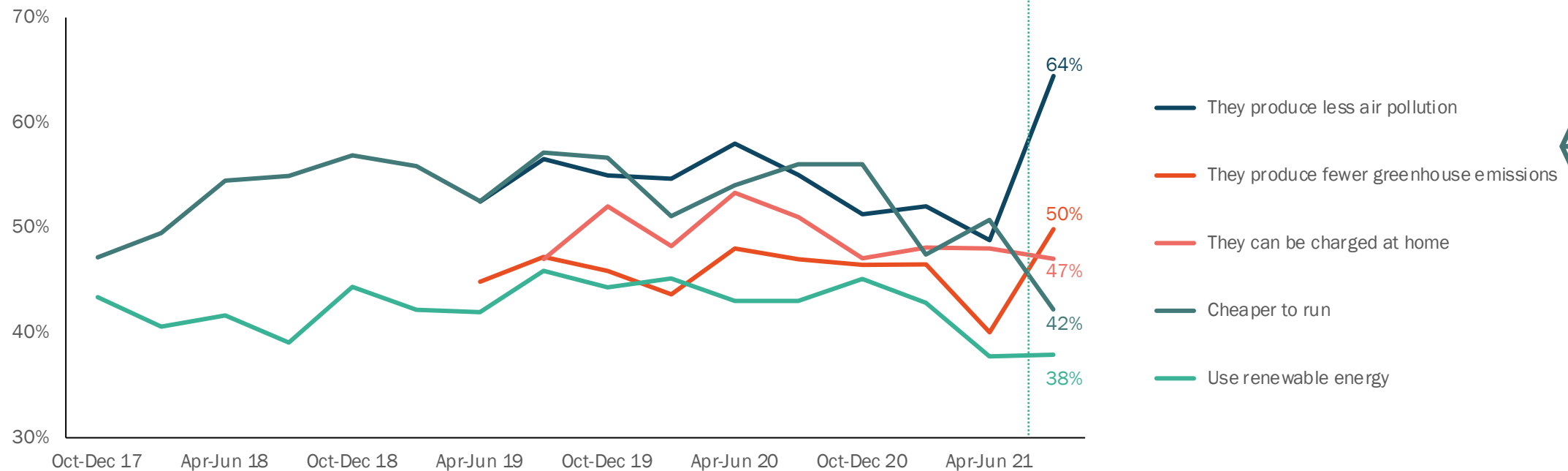


# Benefits of EV ownership are environmental, and cost/convenience related

The most common benefits associated with EVs this quarter are both environmental: producing less air pollution and fewer greenhouse emissions.

## Perceived Benefits of EVs

Please note change in wording implemented in June 2021 – this will impact quarter-on-quarter trends

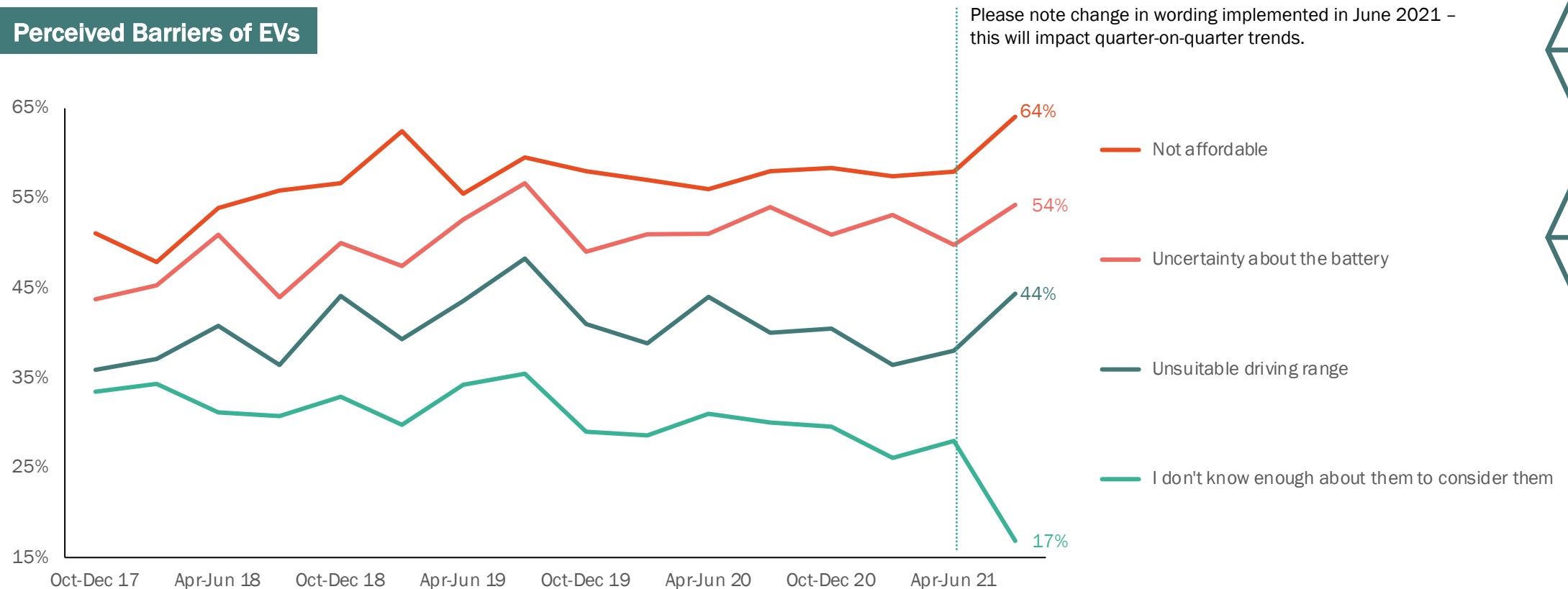


**Q178.** Which, if any, of the following do you believe are benefits of electric vehicles? Please note that the question wording was changed for the FY22 programme. Previously the question was: What is it about electric vehicles that would make you likely to consider them the next time you buy a vehicle? **Base:** Current / intended car owners – 3MR (n=356).

# Perceived barriers to EV ownership stem from affordability and lack of knowledge

Affordability is seen as a barrier by nearly two-thirds and uncertainty about the battery a concern for over half.

## Perceived Barriers of EVs



**Q179.** And which, if any, of the following do you think are drawbacks to electric vehicles? Please note that the question wording was changed for the FY22 programme. Previously the question was: 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=356).