JULY 2018

EECA Electric Vehicle Fleet Manager Understanding Business Research

PREPARED FOR: EECA

PREPARED BY: IPSOS

CONTACT: INFORMATION WITHHELD UNDER SECTION 9(2)(A)

GAME CHANGERS

Executive Summary (i)

When boiled down to the fundamental level, the purpose of a vehicle that is owned or leased by a company is to facilitate everyday business activities, thus saving time and money.

Fleet managers still generally opt for traditional fuel vehicles, because petrol and diesel vehicles offer fleet managers a degree of certainty around meeting the basic needs of the business, and therefore are the most considered vehicles by some distance. For EVs to seriously enter the consideration of fleet managers, the mental barrier of uncertainty must be overcome.

Given that saving time is an inherent aspect of a vehicle being 'fit for purpose', as it currently stands, EVs are often viewed as not fulfilling this requirement. This is due to their potentially disruptive impact on the day-to-day activities of a business (e.g. cars not having sufficient driving distance, drivers needing to charge their vehicles throughout the working day, etc.), which could therefore lose both time and money for the business.

Executive Summary (ii)

Assurances need to be made around the ability of EVs to fulfil key purchase decision-making criteria. Fit for purpose, reliability, and overall costs are the key decision-making criteria for fleet managers. As it currently stands, fleet managers exhibit a lack of confidence in the ability of EVs to tick these boxes, and as long as these concerns persist, it is likely that EVs will continue to struggle to achieve widespread consideration.

Ultimately, **EVs must be able to provide the assurance that a switch will not lead to a loss of time (and as a result, a loss of earnings).** EVs could look to make inroads into the consideration set of fleet managers by positioning the adoption of vehicles as a gradual change (so they can get a sense of how 'they work') and focussing on businesses with mainly passenger vehicles (so range anxiety is less of an issue).

Something for tomorrow, but not for today. Compared with the 2015 study, we can see some encouraging improvements around the consideration and perception of electric vehicles. However, the vast majority of fleet managers still view EVs as something they will adopt in time, as opposed to a serious contender for work vehicles in the present day.

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RESEARCH OBJECTIVES AND METHODOLOGY

Why and how we're conducting this research

RESEARCH OBJECTIVES

- Understand if the barriers for private fleets have shifted or changed and how EECA might be able to influence and support purchasing decisions when it comes to electric vehicles.
- How do businesses monitor and / or audit their fleets (telematics, etc.), how often do they audit?
- What is their current infrastructure (number of carparks, carpark types, etc)? How does infrastructure impact their decisions, e.g. number of carparks, do they understand the impact of installing chargers and would that be a factor in their purchasing decisions?
- Their feelings towards sustainability / carbon reduction / climate change as an organisation and how that impacts purchasing decisions for vehicles.
- What would they like to know about the impact of bringing EVs into the fleet that they currently don't have information on?
- How does the residual price of EVs impact their decision-making?
- Their attitude towards electric vehicles (align with consumer measures, e.g. familiarity, consideration, favourability, etc.).
- Consideration sets for purchase of vehicles, e.g. fit for purpose, safety, reliability, etc.
- How many cars are in their fleets? How long do they expect to keep these vehicles? Do they understand the running costs and total cost of ownership of electric vehicles, and how would they determine this?
- Do they own or lease their fleet vehicles and what factors are considered in making this decision?
- Who are the decision-makers and influencers of fleet purchase?

The research approach and samples

Quantitative CATI survey of Fleet Managers and Business Owners (n=200)

- Interviews were conducted from 28th May to 14th June 2018; the average interview duration was 21 minutes.
- The survey has had substantial changes since 2015. However, historical comparisons have been made where possible.
- We spoke to businesses who had a minimum of 5 light vehicles in their fleet and the person spoken to was a fleet manager or other fleet decision-maker.

Qualitative Research
Fleet Manager interviews (n=12)

- Interviews were 1 hour long.
- Interviews were held in Auckland.
- Interviews were conducted from 30th April until 11th May.
- We spoke to a variety of fleet managers with different vehicle types and vehicle arrangements, i.e. pool vehicles.

Vehicles Managed:	5-9 vehicles	10-19 vehicles	20+ vehicles	TOTAL INTERVIEWS
Number of Interviews:	n=3	n=3	n=6	n=12

Note: Quantitative outputs on the report are denoted by the colour **orange**. Qualitative outputs are denoted by the colour **blue**.

SAMPLE PROFILE – QUANTITATIVE STAGE

Who we spoke to in the quantitative study

(n=200)
respondents

21 minutes
average duration

Role in Business

41% Senior Manager
22% Business Owner
12% Other Managers
10% Fleet Manager
7% Finance Manager
8% Other

Number of Employees

13% 15 people or less
18% 16 to 29 people
12% 30 to 49 people
20% 50 to 100 people
37% More than 100 people

Company Sector

30% Construction
13% Manufacturing
11% Transport, Postal and Warehousing
7% Agriculture, Forestry and Fishing
6% Electricity, Gas, Water and Waste
6% Professional, Scientific and Technical Services
4% Accommodation and Food Services
4% Wholesale Trade
3% Healthcare
2% Retail Trade
2% Financial and Insurance Services
2% Rental, Hiring and Real Estate
2% Education
1% Mining
1% Telecommunications
6% Other

Company Sector (GROUPED)

34% Production, Sales and Transport
30% Construction
22% Professional
14% Primary Industries

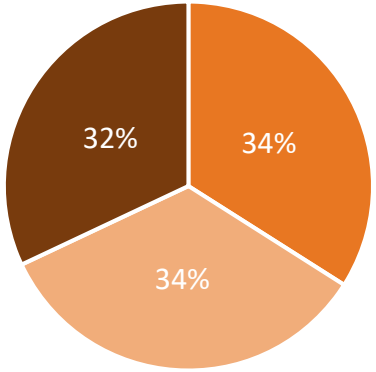
Importance of Sustainability / Carbon Reduction to Company

13% Unimportant
28% Neutral
57% Important
2% Don't Know

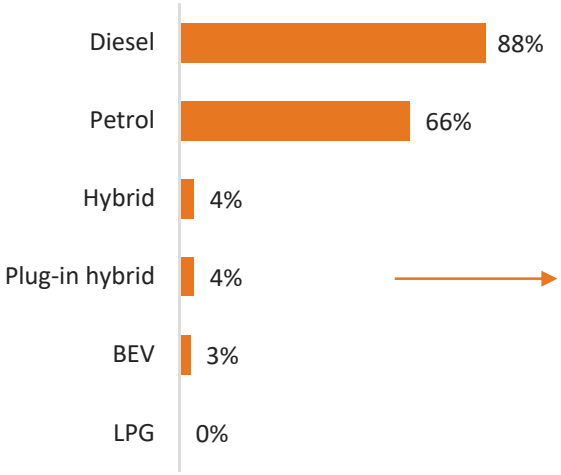
PROFILING THE CURRENT FLEET

Over half of businesses have fleets that comprise vehicles that use different fuel types, with 8% already having non-traditional fuel types

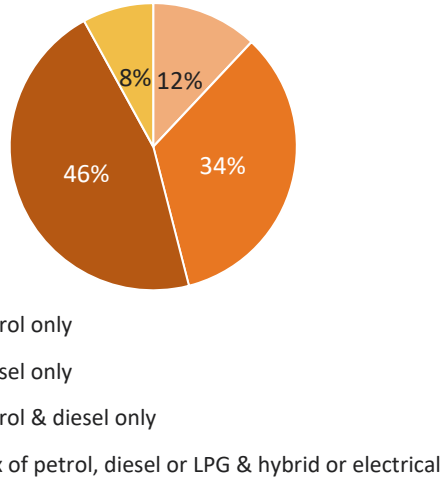
Number of Vehicles
(n=200)



Fuel Types
(n=200)



Fuel Type Summary
(n=200)



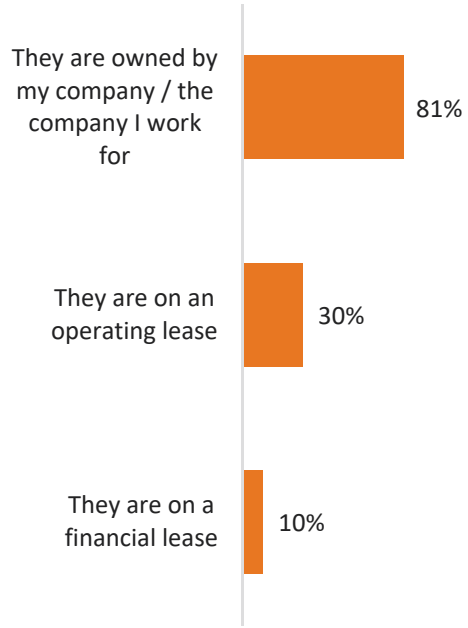
"Diesel vehicles are vehicles suitable for hard-work. You have to be silly to break a Diesel vehicle (because of this they last longer)."

***S3** Approximately how many light vehicles are currently operated by your company? / **F1** Which of the following best describes how the light vehicles in the fleet of your company are fuelled?*

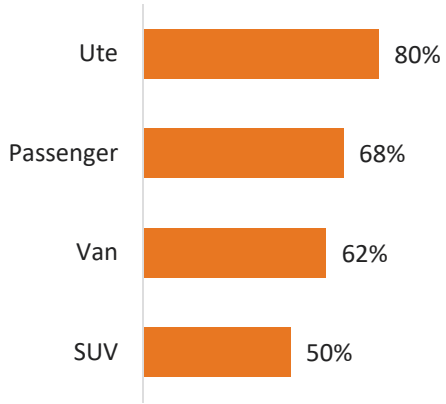
***Base:** Total sample (n=200)*

The majority of businesses choose to own their fleet vehicles, with most having a range of different vehicle types within their fleet

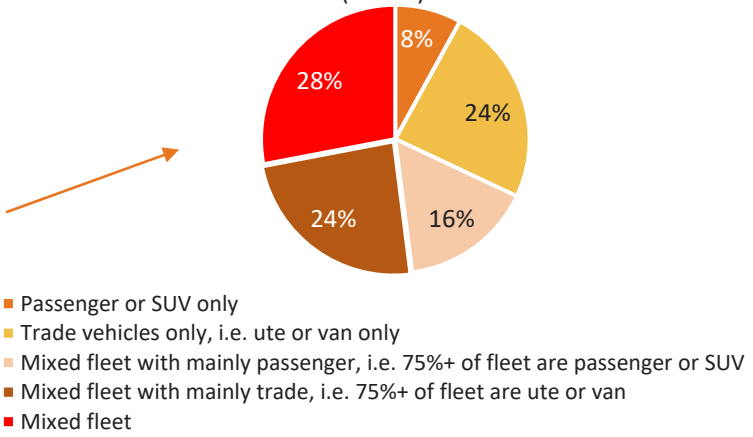
Ownership Type
(n=200)



Vehicle Types
(n=200)



Vehicle Types Grouped
(n=200)

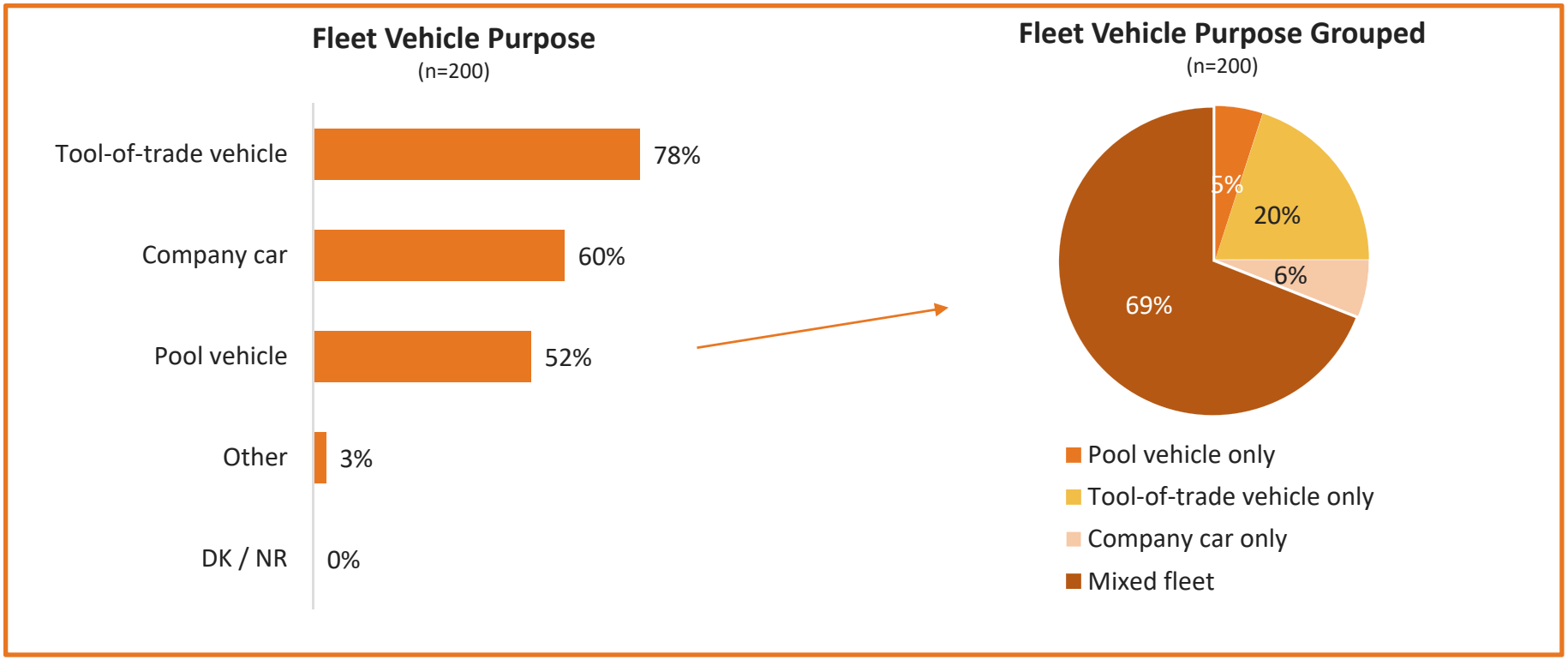


"Sales representatives will get a Toyota Camry or Rav4. Everyone else gets a truck or a van. The [passenger vehicles] are part of the remuneration package of sales representatives while the trucks and vans are owned by the business."

***F3** Which of the following ownership types does your vehicle fleet fall? / **S4** Which of the following light vehicle types are operated by your company?*

***Base:** Total sample (n=200)*

Similar to the pattern of fleets having a mixture fuel and vehicle types, fleets also have a mixture of purposes for their vehicles

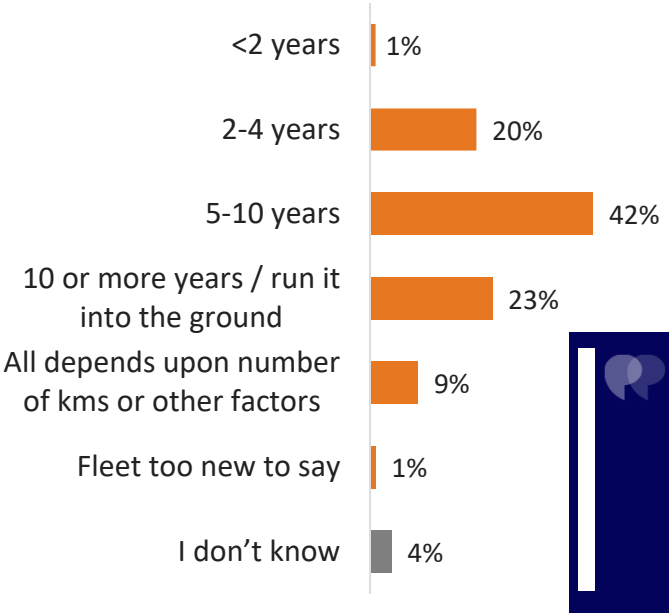


F4 *How many light vehicles in your fleet would fall into each of the following categories?*
Base: *Total sample (n=200)*

As expected, lease vehicles are on a shorter replacement cycle compared to those owned; anecdotally, preference for lease vs. own tends to be cyclical in nature

Average Age of Owned Vehicle Before Replacing

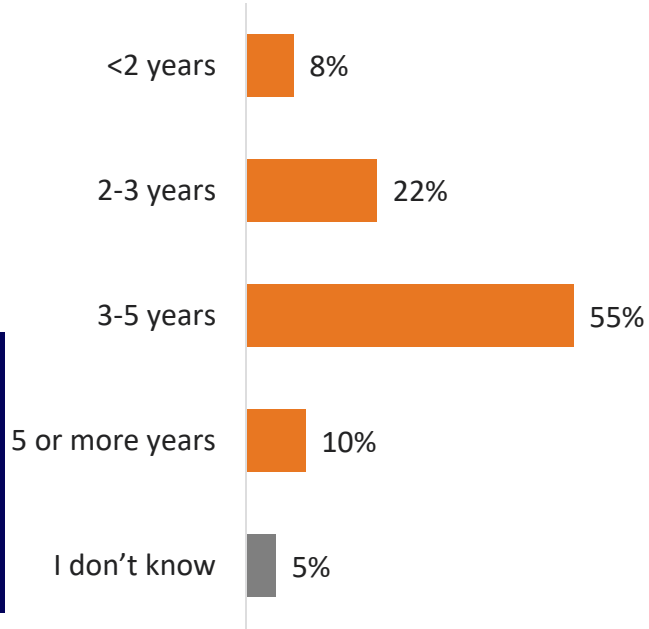
(n=162)



"It seems to be a bit of a cycle between leasing vehicles and then owning vehicles for the companies I have worked at over the years."

Typical Cycle of Lease Before Replacing

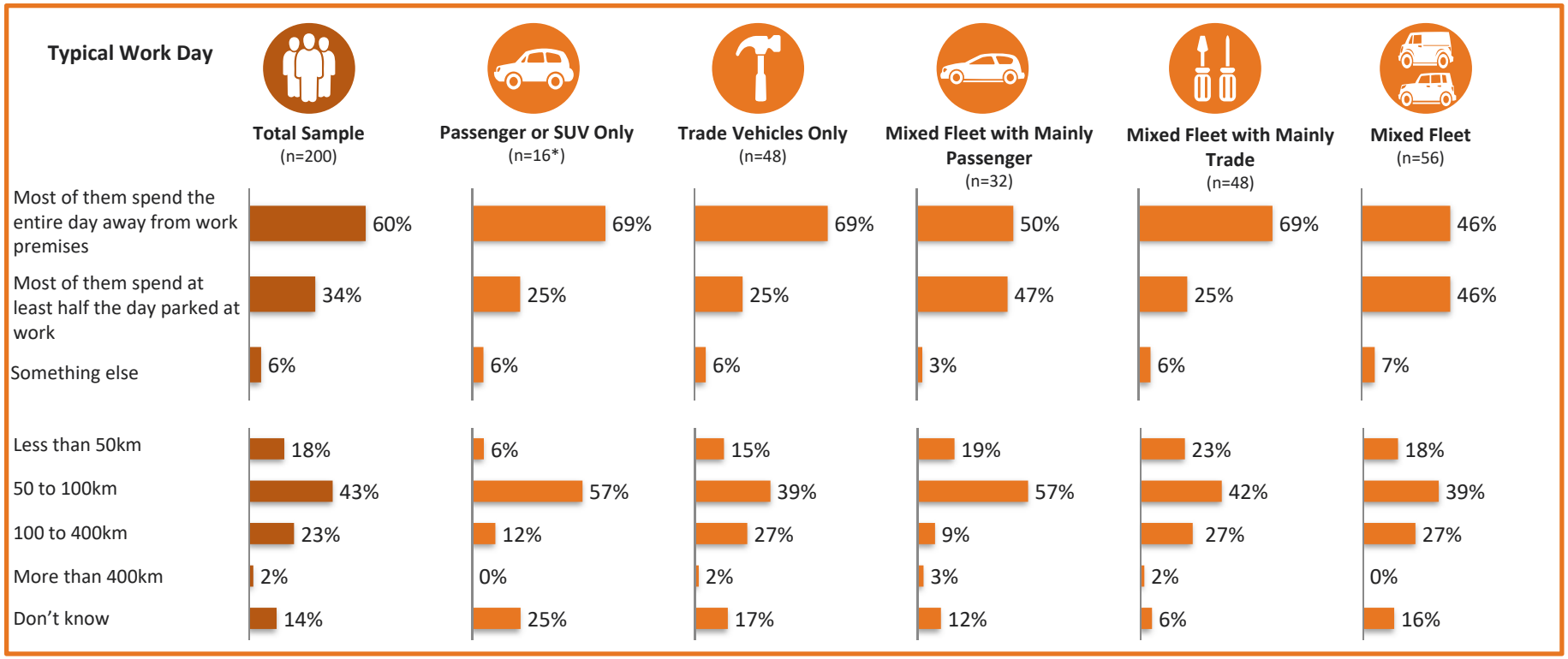
(n=73)



F12 *For the light fleet vehicles your company purchases, typically what's the average age of them before you consider replacing it?* ***Base:*** *Those whose business owns fleet vehicles (n=162)*

F13 *For the light fleet vehicles your company leases, typically what's the cycle of the lease?* ***Base:*** *Those whose business leases fleet vehicles (n=73)*

Fleets with passenger / SUV vehicles are the largest opportunity for at-work charging; they also tend to have lower average distances travelled



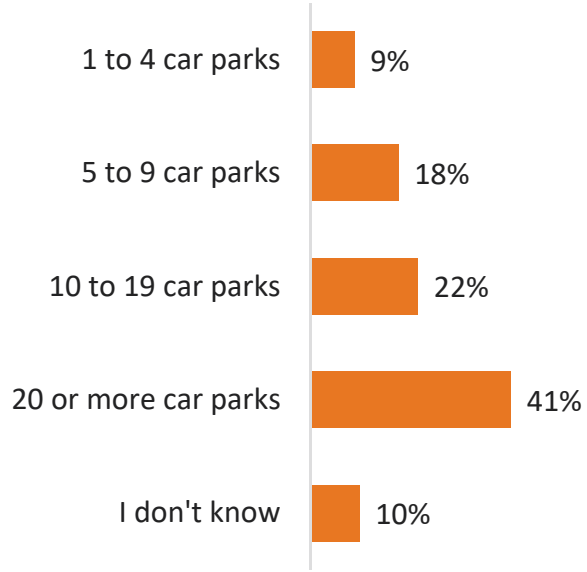
F14 *Which of the following best describes where the vehicles of your fleet typically are during a work day? /* ***F7*** *Thinking about the average light vehicle currently operated by your company, approximately how many kilometres would they travel in a typical day?*

Base: *Total sample (n=200).* ****Warning:*** *Low base size.*

The majority of businesses have off-street private parking in uncovered dedicated bays for their fleet, which indicates charging points could be installed

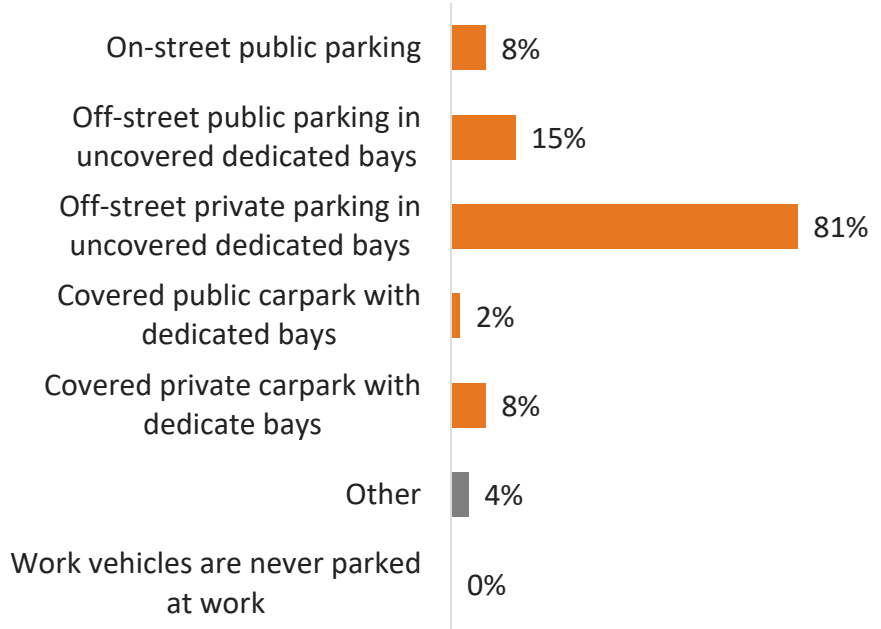
Car Parks on Work Premises

(n=200)



Type of Parking Available at Work

(n=200)

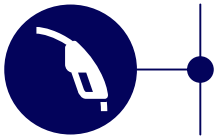


F5 *Approximately, how many car parks do you have available on-site at your work premises specifically for the light vehicle fleet?* / ***F6*** *And what type of parking does your fleet primarily have access to when at work?*

Base: *Total sample (n=200)*

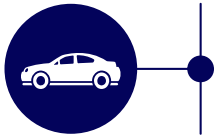
CURRENT FLEET

Section summary and implications for EV uptake

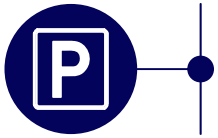


Traditional fuel types dominate fleet composition, with only 8% of companies having non-traditional fuel type vehicles in their fleet. ICE vehicles appear to be entrenched.

The majority of fleets are of mixed composition in terms of vehicle type and vehicle purpose. Therefore, the adoption of EVs could be positioned as a progressive or partial process, rather than a whole-scale process for an entire fleet.



Fleets that contain passenger vehicles appear to be the most likely target for EV uptake, as they tend to be the vehicle types that spend more time on work premises and travel on average shorter daily distances.



Companies appear to have sufficient parking for their fleets, and with the majority of these being private off-street parking, the installation of on-site charging stations is a possibility.

FLEET DECISION-MAKING

Vehicles ultimately save businesses time, which is intrinsically linked to the 3 key criteria of fleet vehicle choice; if they fail to meet these, it could cost time and

The fundamental purpose of a vehicle for a business is to facilitate daily business activities.

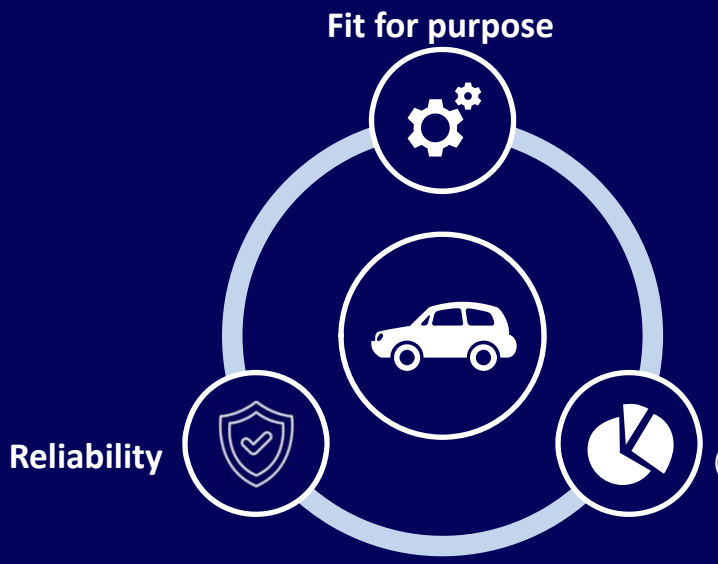
Ultimately, this facilitation leads to time efficiency and an increase in production.

With time seen as a cost to the business, anything that impacts this is seen as a potential negative.

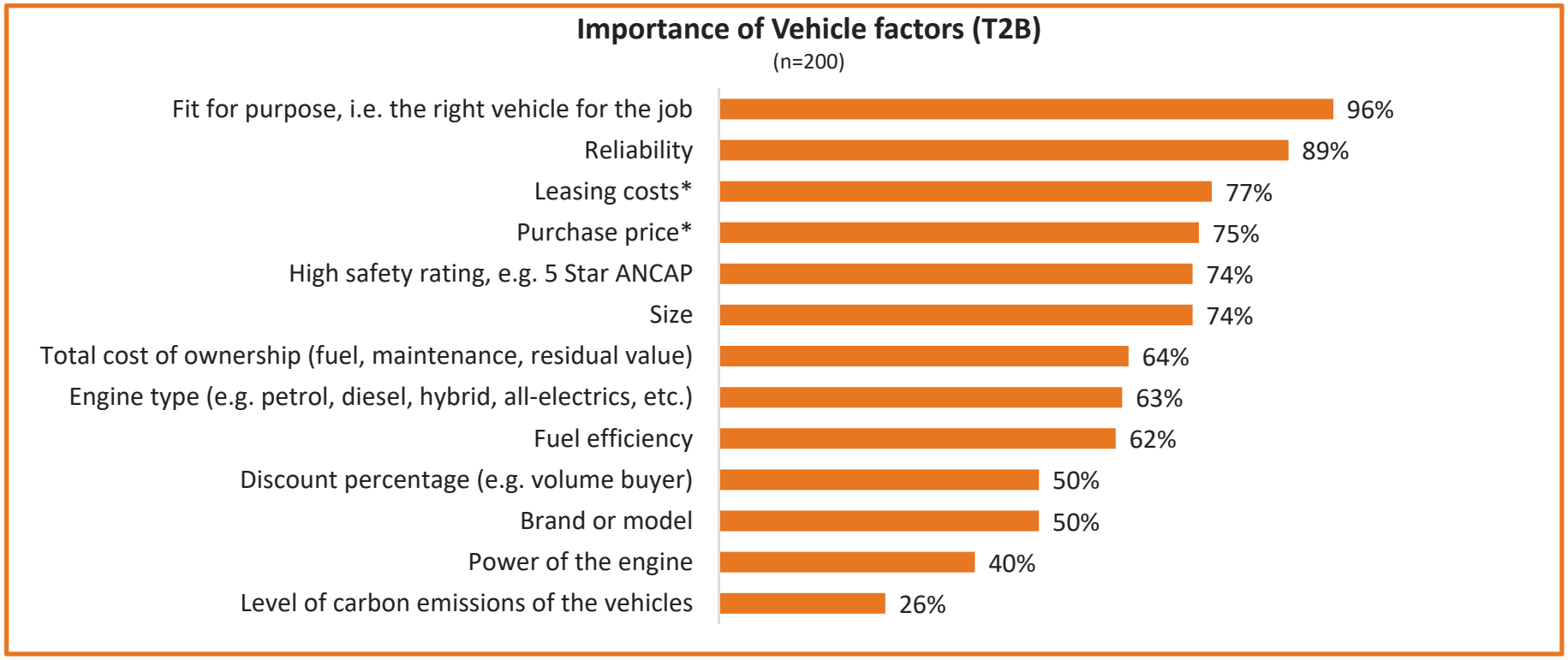
Although time was not explicitly discussed in relation to fleet decision-making, it was implicitly linked to the top-3 criteria of fleet vehicle choice:

1. Fit for purpose
2. Reliability
3. Costs

And if a potential vehicle didn't meet any of these 3 top criteria, it would simply not be a serious contender in their vehicle choice, as it could end up being a cost to the business.



Clearly *fit for purpose* and *reliability* are top-tier factors for fleet managers when purchasing or leasing a new vehicle, whilst *carbon emissions* is the lowest



F15 *On a scale from 1 to 5 where 1 is 'not at all important' and 5 is 'extremely important', please tell me how important or unimportant each factor was in the most recent fleet purchase or lease decision made by your company / the company you work for?*

Base: *Total sample (n=200).* ****Note:*** *Asked only of some respondents.*

Fit for purpose, reliability and *costs* are seen as closely related and are typically viewed as non-negotiables when purchasing a fleet vehicle

FIT FOR PURPOSE

The vehicle needs to be suitable for the type of work it is used for, along with the employee and their role.

Assessing whether a vehicle is fit for purpose covers a wide range of factors, including driving distance, fuel type, vehicle size, storage size, driver's habits, etc. Ultimately, it is whether the vehicle can do the job that will be required of it for its role.

"For one guy that does work on commission, we gave him a Nissan NV200s because he only needs to chuck a few bits and pieces in the back."

RELIABILITY

Related to 'fit for purpose', managers are looking for reliable vehicles that will take employees from A to B on a consistent basis and will do the job required of them without breaking mechanical issues.

Although reliability is somewhat a given with modern vehicles, there is a propensity towards using diesel vehicles because they perceive them as being 'unbreakable cars'.

"We're looking for a brand with reliability, to cover long driving distances, hence the master lease with Toyota."

COSTS

Although split out in the quantitative study, qualitatively managers see costs as a group of factors under the broad umbrella of total cost of ownership.

Up-front costs, on-going fuel use and maintenance costs are considered, although with new vehicles the latter is often covered by a service agreement.

Residual cost is not a huge consideration, as vehicle replacement is fairly frequent.

"We always review driver / owner costs so we aren't placing them in a position that the cost to do business is high. Fuel use is a major component of that. So we want to ensure that fuel efficiency is high."

Other factors are still relevant when acquiring a new vehicle outside of the three key criteria, although their importance varies according to industry type

SAFETY RATINGS

Fleet managers consider health and safety to be important when purchasing or leasing a new vehicle.

However, most think that safety features are an inherent characteristic of new vehicles, so not something that needs to be especially specified unless of particular concern.

"Most of the cars we buy already have up-to-date safety features. Safety features come into play when recommending a car to one of our clients."

DISCOUNTS

Discounts are more relevant to managers that purchase new vehicles.

Some of these managers will wait for specials to purchase a new vehicle. Fleet managers buying second-hand vehicles regularly check Trade Me for a vehicle that may be of interest to them.

"[When I look at buying a new car] I'd wait until the new model comes out, so that I can get a discount on the old one (Nov / Dec time)."

BRAND OR MODEL

Specifying a particular brand or model relates in part to vehicle purpose, reliability and manufacturer support, as well as how it reflects on the image of a business.

Client-facing employees or companies with a premium image tend to be more concerned with the brand / model of vehicle they own.

"In the past we've had different makes and models, but it hasn't suited us that well. Hence only using Mercedes Sprint."

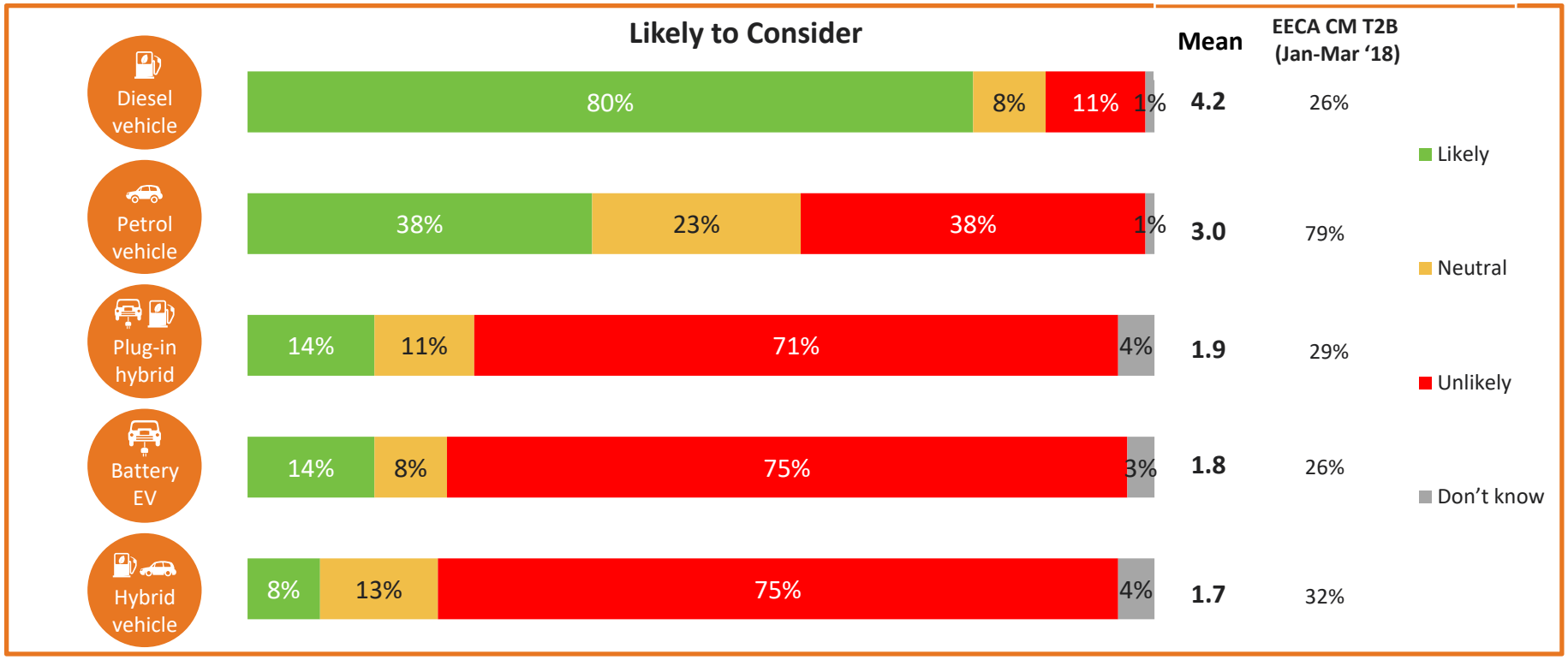
CARBON EMISSIONS

Some fleet managers are considering the environment in their purchases due to company policy, but for the most part businesses do not directly consider this as a criterion for vehicle choice.

However, desire for a fuel-efficient vehicle by proxy leads to lower carbon emissions.

"We have people that are looking at our carbon footprint, we have a green policy and we have a moral obligation as a large corporation to comply."

For now, three quarters of fleet managers would not be likely to consider battery EVs the next time they need to buy or lease a vehicle for the business



F2 *Thinking about your next vehicle purchase or lease for the business, how likely is it that the business will consider the following vehicle types?*

Base: *Total sample (n=200), Jan-Mar'18 Consumer Monitor (n=717)*

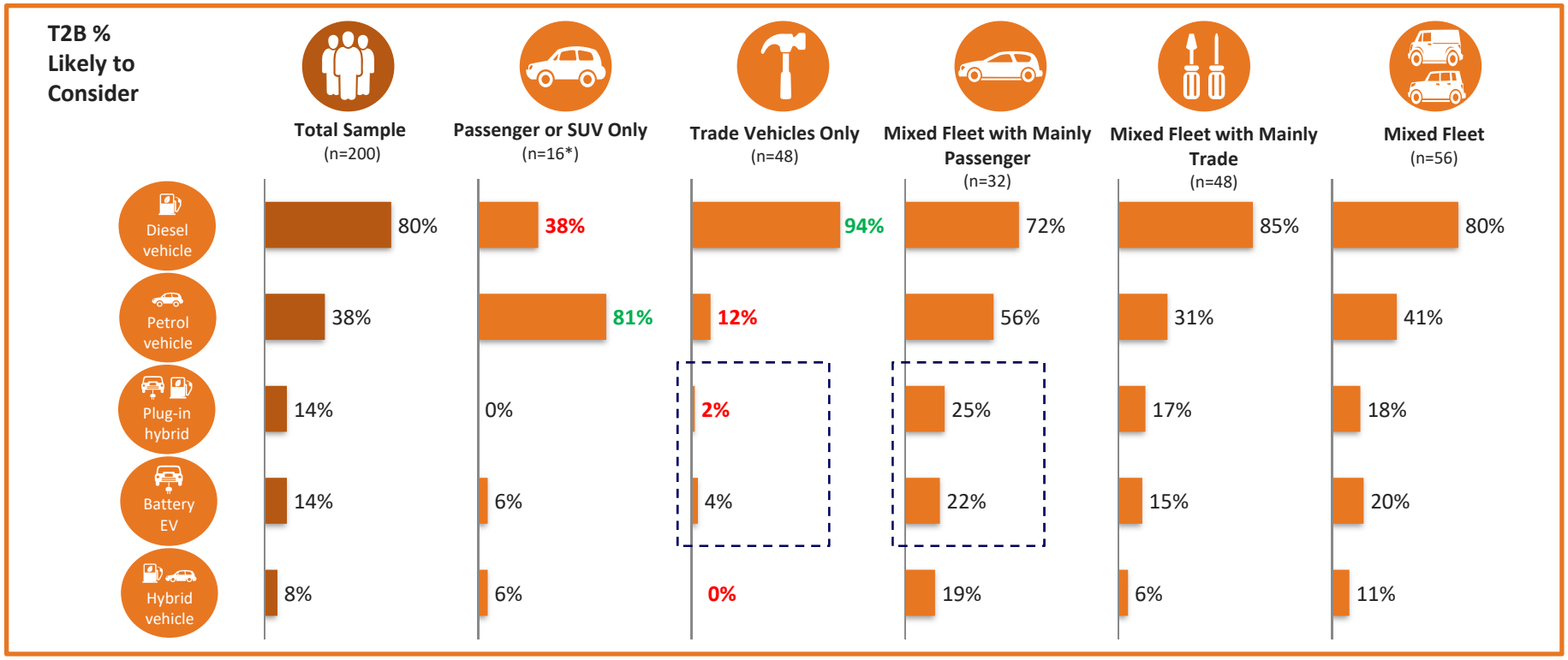
While over half of businesses haven't considered electric vehicles for their fleet at all, this figure is substantially lower than it was in 2015

Consideration of Electric Vehicles		2015 (n=199)
Electric vehicles haven't been considered for the fleet at all	55%	69%
Electric vehicles were considered for the fleet, but aren't considered viable	25%	16%
Electric vehicles are currently under consideration for the fleet	12%	6%
The fleet has electric vehicles, but there are no plans to add more for the foreseeable future	2%	3%
The fleet has electric vehicles & there are currently plans to add more, but not go all-electric yet	2%	3%
The fleet has electric vehicles & there are currently plans to go all-electric	2%	0%
The entire fleet is already electric	0%	0%
Something else	0%	0%
I don't know	2%	2%

EV5 *Which of the following best describes how much or little electric vehicles have been considered as replacements for light vehicle fleet of your company?*

Base: *Total sample (n=200)*

Fleets with trade vehicles only are the most resistant to EVs, while mixed fleets with mainly passenger vehicles are more open to considering them



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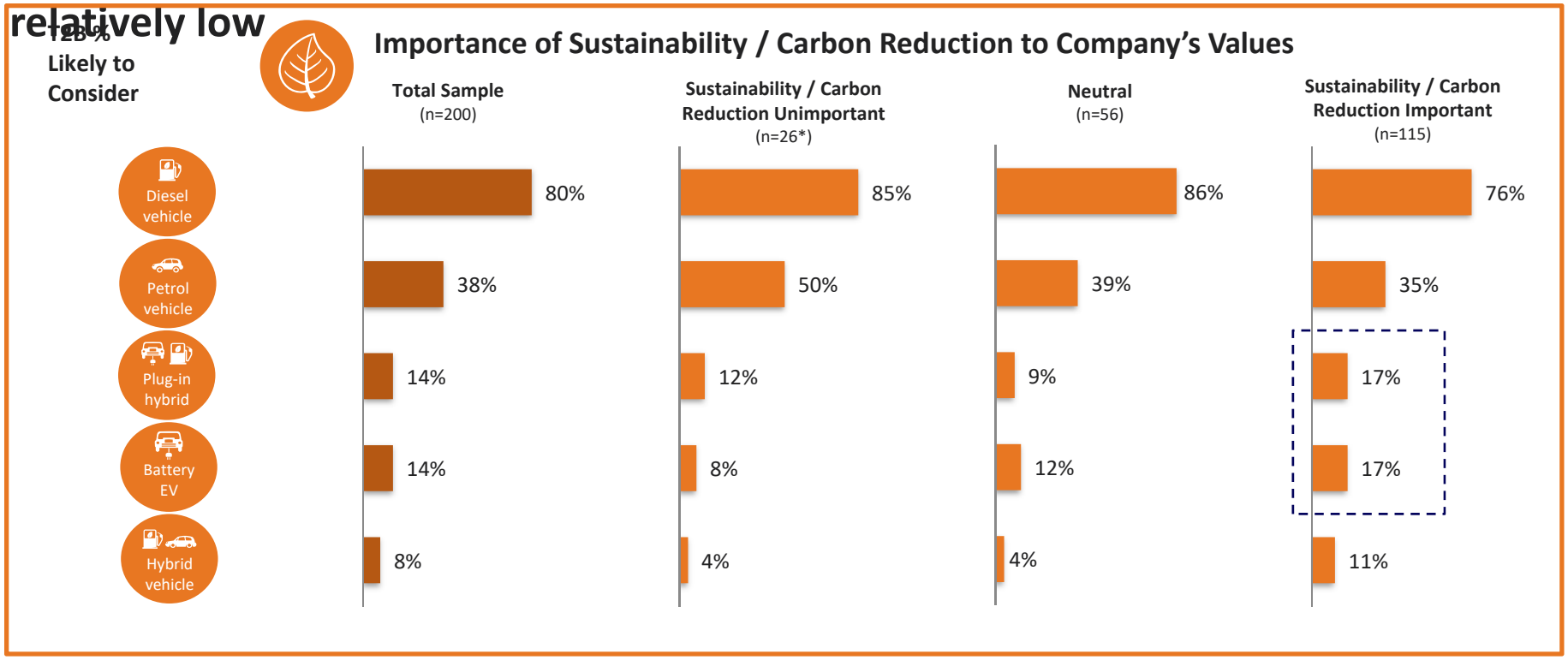
S4A Out of 100, approximately what percentage of the overall vehicle fleet is each of the following vehicle types? / F2 Thinking about your next vehicle purchase or lease for the business, how likely is it that the business will consider the following vehicle types?

***Base:** Total sample (n=200). ***Warning:** Low base size.*

Companies with strong values around sustainability and carbon reduction are more likely to consider purchasing an EV, but consideration levels are still relatively low



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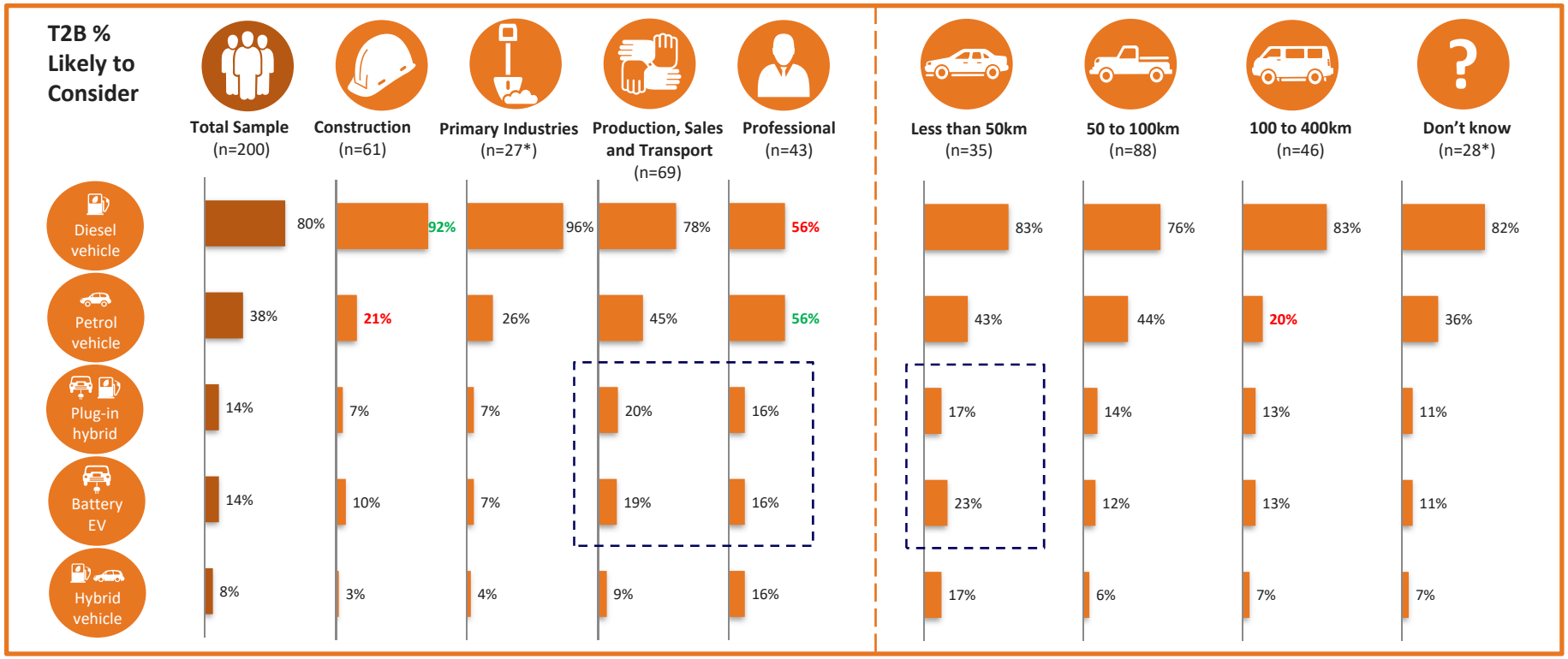
F2 Thinking about your next vehicle purchase or lease for the business, how likely is it that the business will consider the following vehicle types? / C3 Lastly, how would you rate the importance of sustainability or carbon reduction to the values and actions of your company, on a scale from 1 to 5 where 1 is 'not very important and 5 is 'very important'?

***Base:** Total sample (n=200) **Note**: 3 respondents answered 'don't know'. ***Warning:** Low base size.*

GAME CHANGERS

Managers with fleets that drive less than 50km on an average day are more likely to consider electric vehicles, as are those not in construction or primary industries



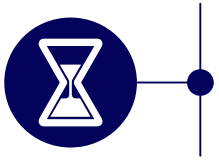
Green is sig. ↑, Red is sig. ↓ than Total

F2 *Thinking about your next vehicle purchase or lease for the business, how likely is it that the business will consider the following vehicle types? /* ***C1*** *Which sector does your company primarily operate in? /* ***F7*** *Thinking about the average light vehicle currently operated by your company, approximately how many kilometres would they travel in a typical day?*

Base: *Total sample (n=200).* ***Note:*** *3 respondents travel more than 400km.* ****Warning:*** *Low base size.*

GAME CHANGERS

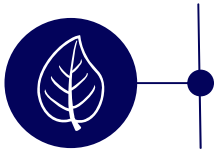
Section summary and implications for fleet decision-making



Saving time (and money) is implicitly linked to the three key criteria fleet managers consider when looking to purchase or lease a vehicle. Vehicles that fail to meet any one of these will invariably be perceived as potentially costing the business time and money, and will not be seriously considered by fleet managers even if it meets other key criteria.

Vehicles that fulfil these basic criteria will then be assessed on other factors including safety, discounts, brand / model, and carbon emissions. Fleet managers rely on this secondary set of factors to decide between the vehicles that are able to facilitate the needs of the business first and foremost.

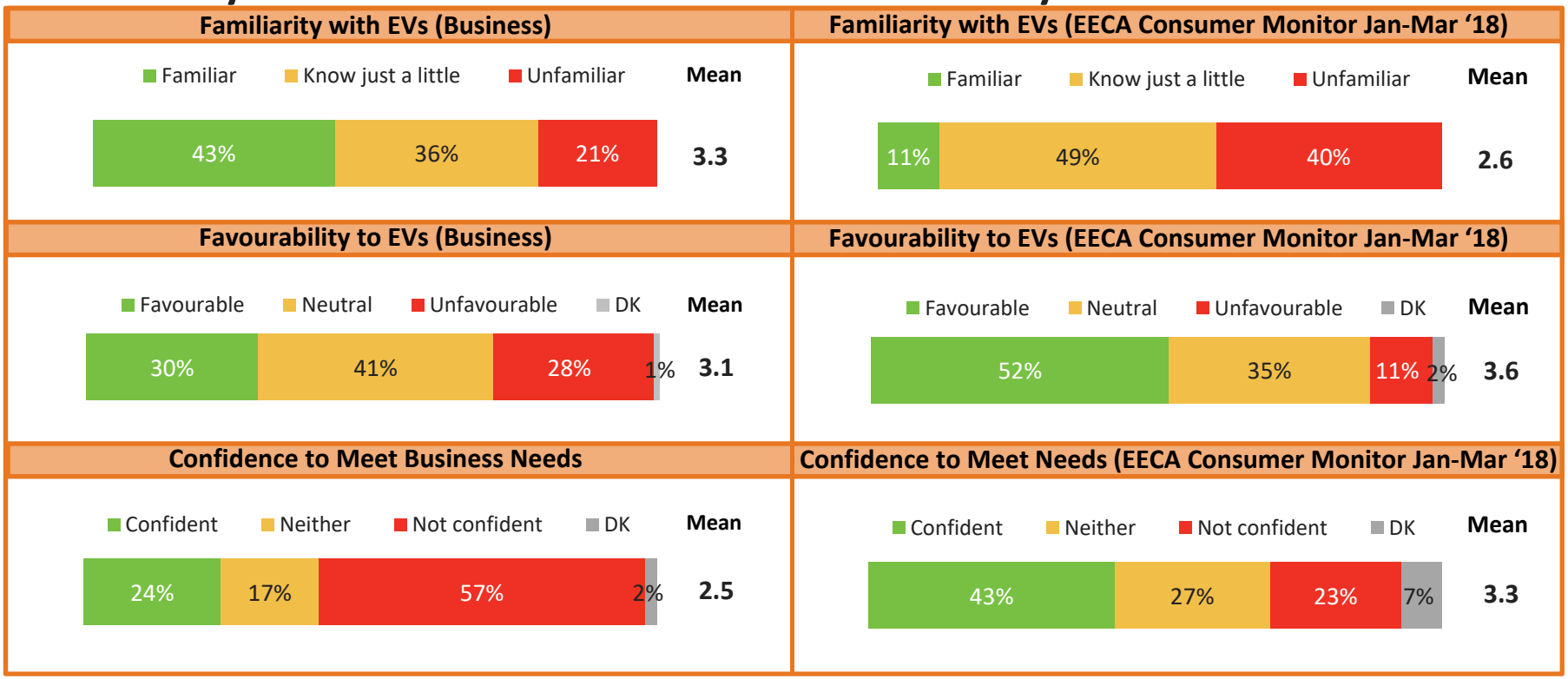
Diesel vehicles are the most likely fuel type to be considered by fleet managers for their next vehicle purchase / lease, followed by petrol vehicles. These vehicle types are 'tried and tested' and known to meet their needs; whereas on the other hand, electric vehicles are not considered by three quarters of fleet managers as they are an unknown risk.



Mixed fleets, companies with strong sustainability values, fleets with vehicles that travel less than 50km per day on average, and industries outside of construction and primary industry all tend to be more open to considering electric vehicles. However, consideration levels are still comparatively low and therefore some distance away from being a serious purchase option.


EECA
Energy Efficiency and Conservation Authority
Te Tari Tiaki Pūngao
ELECTRIC VEHICLES
GAME CHANGERS
Ipsos

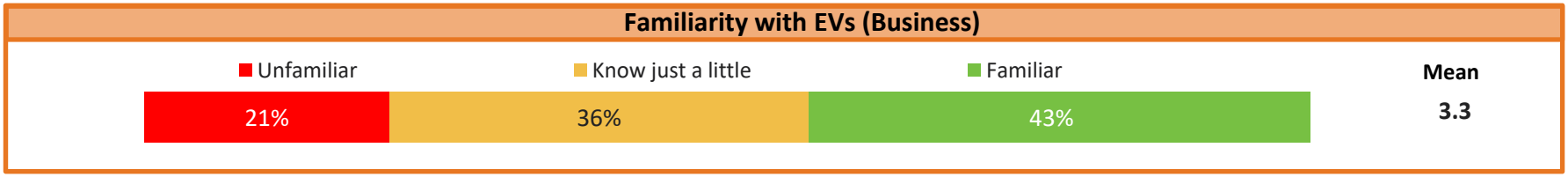
Fleet managers are more familiar with EVs than the general population, but considerably less favourable to and confident that they can meet their needs



EV1 *How would you rate your familiarity with Electric Vehicles? /* ***EV2*** *How favourable or unfavourable is your overall opinion or impression of Electric Vehicles for business use? /* ***EV3*** *To what extent are you confident that Electric Vehicles can meet the needs of your business? /* ***EV4a*** *Why are you not confident that Electric Vehicles can meet your business needs? /* ***EV4b*** *Why are you confident that Electric Vehicles can meet your business needs?*

Base: *Total sample (n=200), Jan-Mar'18 Consumer Monitor (n=748)*

Having relatively high familiarity levels with EVs is not unexpected for fleet managers, as vehicle knowledge is a key requirement of their job



All the fleet managers interviewed were aware of the presence of electric vehicles in New Zealand. The majority also had fairly high levels of familiarity with EVs in terms of availability, benefits and perceived limitations.

This is not surprising, given that for most keeping up to date with vehicle developments is part of their job, plus they have a degree of personal interest in vehicles in general.

Several fleet managers, particularly those with a fleet of over 20 vehicles, have investigated electric vehicles as a viable option for their business.

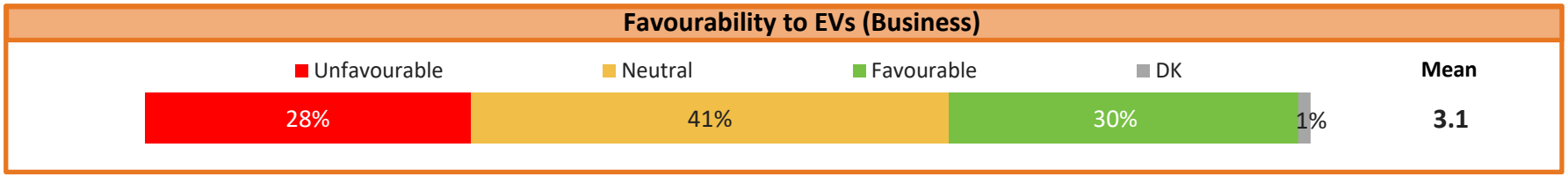
Managers with smaller fleets tend to think of EVs as being a potential choice in the future, and have not seriously investigated their suitability for their business.

"The range is fairly limited. They're the small Nissan Leaf type vehicle and they're quite expensive for what they are. Essentially you're paying for a lot of your fuel costs up-front."

"The distance that some of the sales reps drive in a day exceeds the single charge of EVs that are available. That's why pure EVs are not in the consideration yet based on what I know."

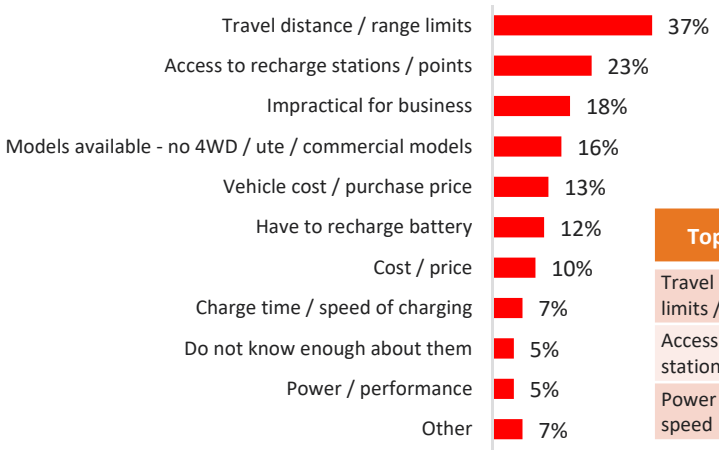
***EV1** How would you rate your familiarity with Electric Vehicles?*
***Base:** Total sample (n=200)*

The main disadvantages of EVs cited by fleet managers are *travel distance* and *access to recharge points*, which are the same disadvantages cited 3 years ago



Main Disadvantage of Electric Vehicles

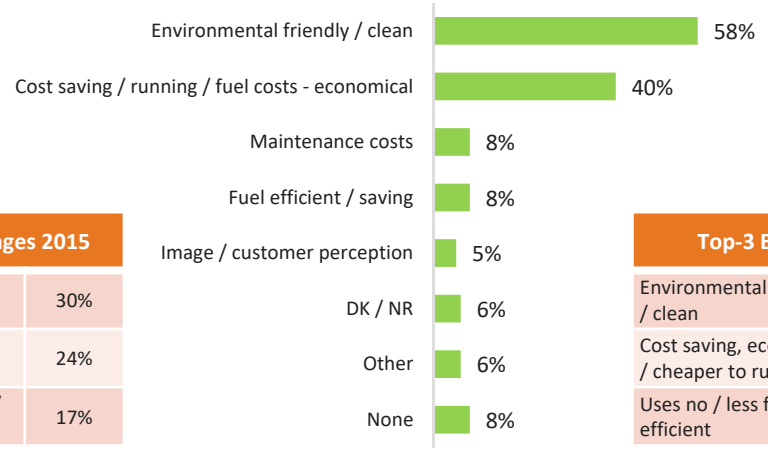
(n=198)



Top-3 Disadvantages 2015	
Travel distance / range limits / reach	30%
Access to recharge stations / points	24%
Power / performance / speed	17%

Main Benefit of Electric Vehicles

(n=192)



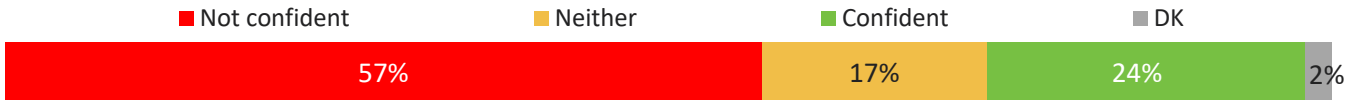
Top-3 Benefits 2015	
Environmental friendly / clean	60%
Cost saving, economical / cheaper to run	45%
Uses no / less fuel, fuel efficient	11%

***EV2** How favourable or unfavourable is your overall opinion or impression of Electric Vehicles for business use? / **EV6** What do you consider to be the main benefit or benefits, if any of electric vehicles over purely petrol / diesel powered vehicles? / **EV7** What do you consider to be the main disadvantage or disadvantages, if any of electric vehicles over purely petrol / diesel powered vehicles?*

***Base:** Total sample (n=200). **Note:** Only responses 5% and above are shown.*

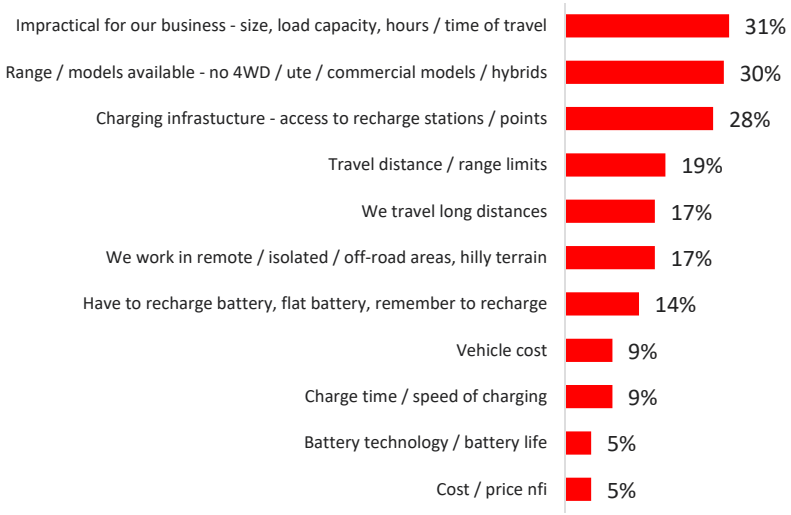
Over half of fleet managers are not confident that EVs can meet their businesses needs, commonly citing *impracticality* and the *range of models available* as key reasons for this

Confidence to Meet Business Needs



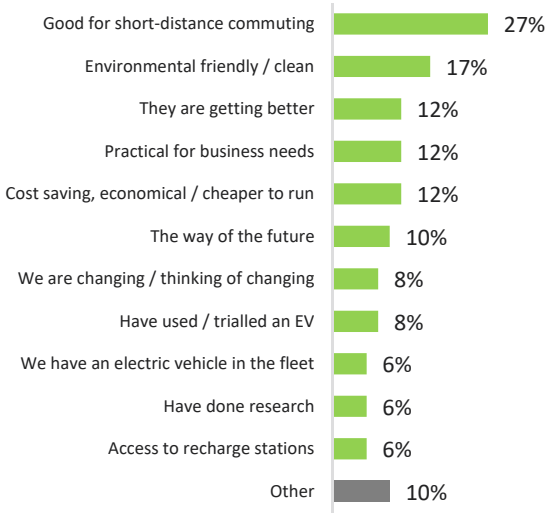
Not Confident that EVS Can Meet Business Needs

(n=115)



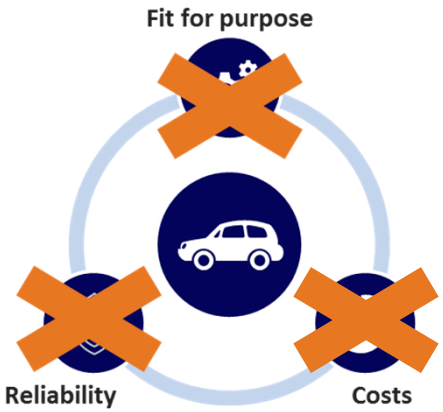
Confident that EVS Can Meet Business Needs

(n=48)



EV3 *To what extent are you confident that Electric Vehicles can meet the needs of your business?* ***Base:*** *Total sample (n=200)* ***/ EV4a*** *Why are you not confident that Electric Vehicles can meet your business needs?* ***Base:*** *Those who are not confident that EVs can meet business needs (n=115)* ***/ EV4b*** *Why are you confident that Electric Vehicles can meet your business needs?* ***Base:*** *Those who are confident that EVs can meet business needs (n=48).* ***Note:*** *Only responses 5% and above are shown*

Fleet managers' low confidence in EVs is caused by their disbelief in EVs' ability to meet all three key criteria



"They don't seem to have catered for business here. I haven't seen any utes or vans."

"If the technology gets to a point where it is reliable, then I'll adopt EVs alright, but up-front costs, fit for purpose and on-going costs are the major factors [to not adopt EVs]."

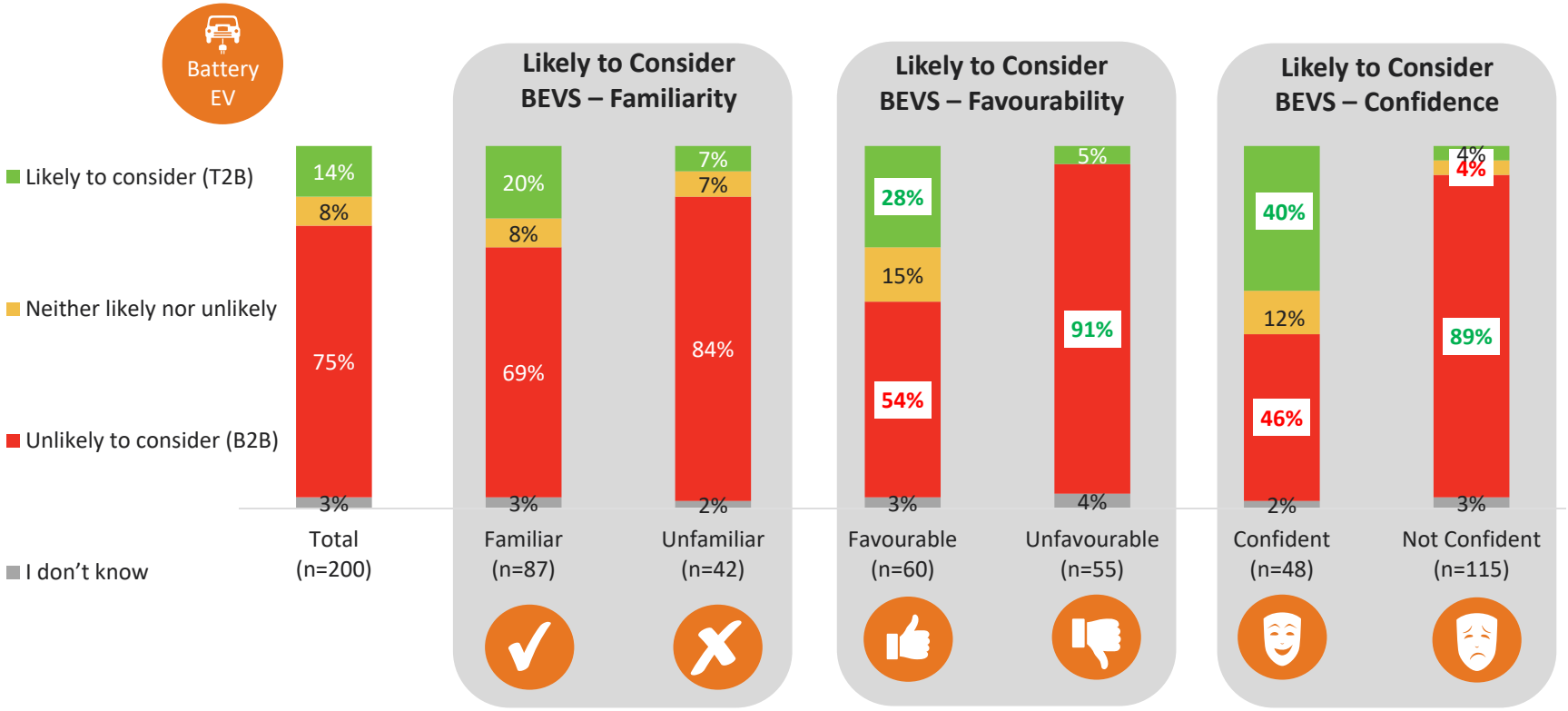
While fleet managers are somewhat familiar with EVs, they are not very favourable towards them and their confidence levels are very low because the majority perceive them as not be able to meet their business needs. They can see that EVs are starting to gain traction in the residential market, but fleet managers apply a different set of criteria when purchasing or leasing a business vehicle, which leads EVs to being seen as:

- **Not fit for purpose.** Not having the range of vehicles types, nor, more importantly, perceived as being capable of travelling an adequate distance.
- **Not reliable.** Existing vehicle types require little worry about running out of fuel, but an EV has to have sufficient charge to meet the day's needs, relies upon employees to remember to charge, etc., or else time (aka money) could be wasted while waiting for a vehicle to charge.
- **Would probably save costs if there were a suitable option, but right now there isn't.** Fleet managers are aware of potential savings from lower fuel costs and would be prepared to pay more due to total cost of ownership efficiencies once up-front costs come down, but despite this, EVs fail on the other two criteria.

While the transition to EVs is seen as the future, at this stage the majority of fleet managers do not consider them to be viable alternatives.

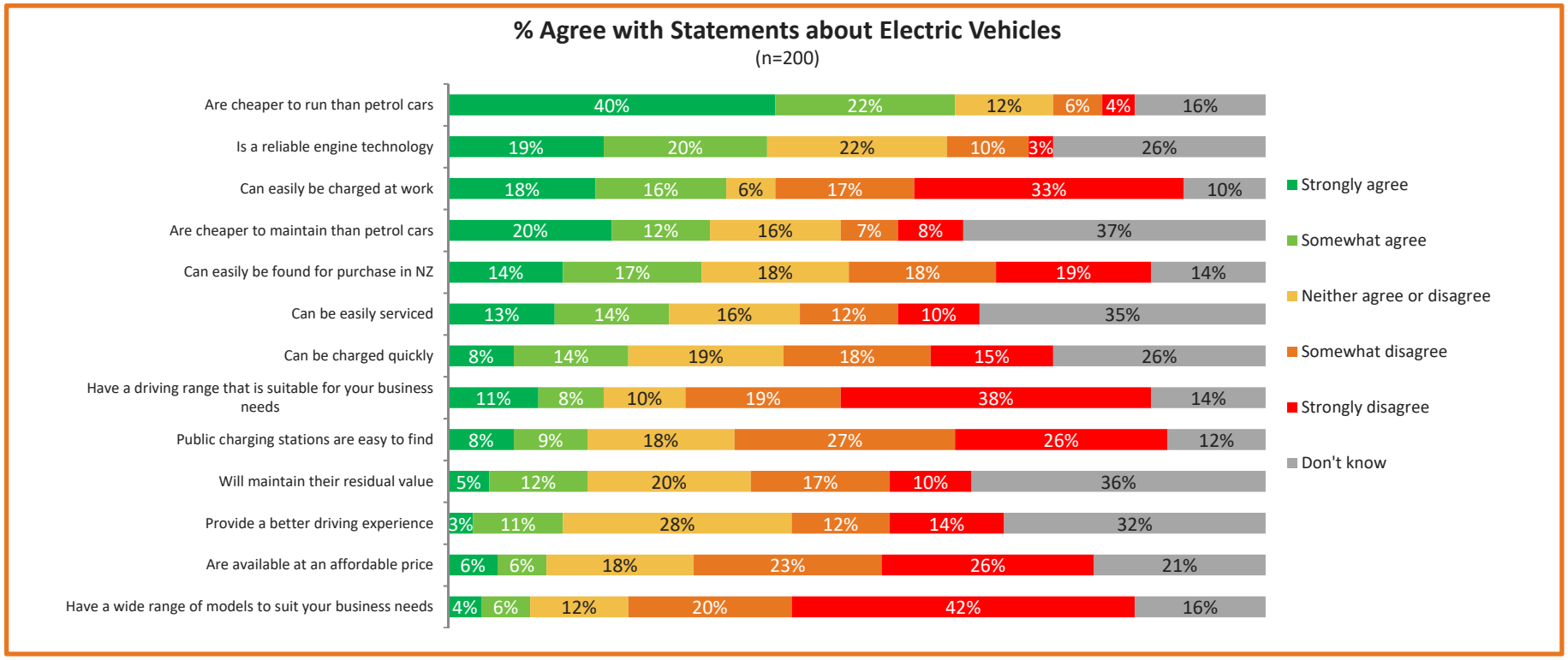
ELECTRIC VEHICLES

Confidence is a key driver in determining whether a business is likely to consider electric vehicles for its fleets



F2 Thinking about your next vehicle purchase or lease for the business, how likely is it that the business will consider the following vehicle types?
Base: *Total sample (n=200)*

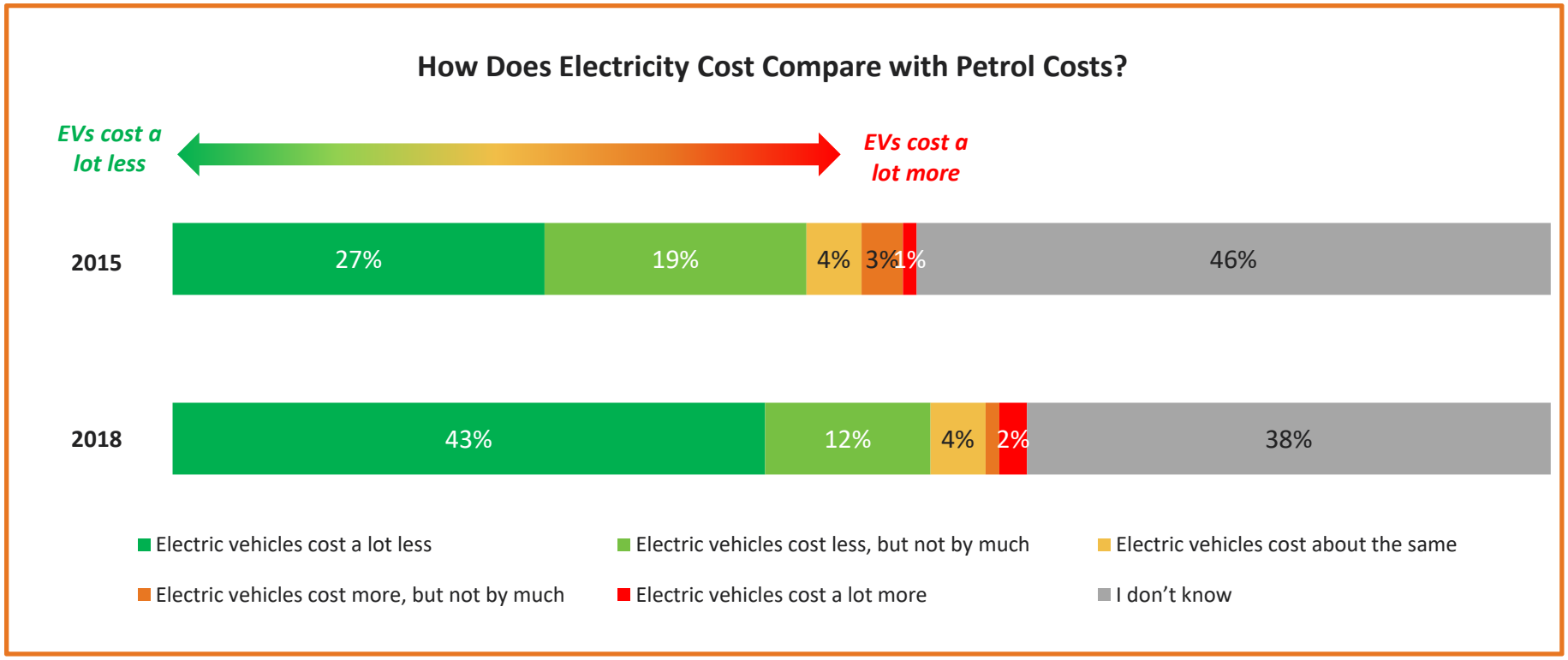
Being *cheaper to run* is for the most part an accepted feature of EVs, whilst *driving range* and *wide range of models* are clearly two aspects that people feel EVs do not possess



EV8 *Now I'm going to read out a list of statements about electric vehicles from a business perspective, please tell me how strongly do you agree or disagree with each of the following statements.*

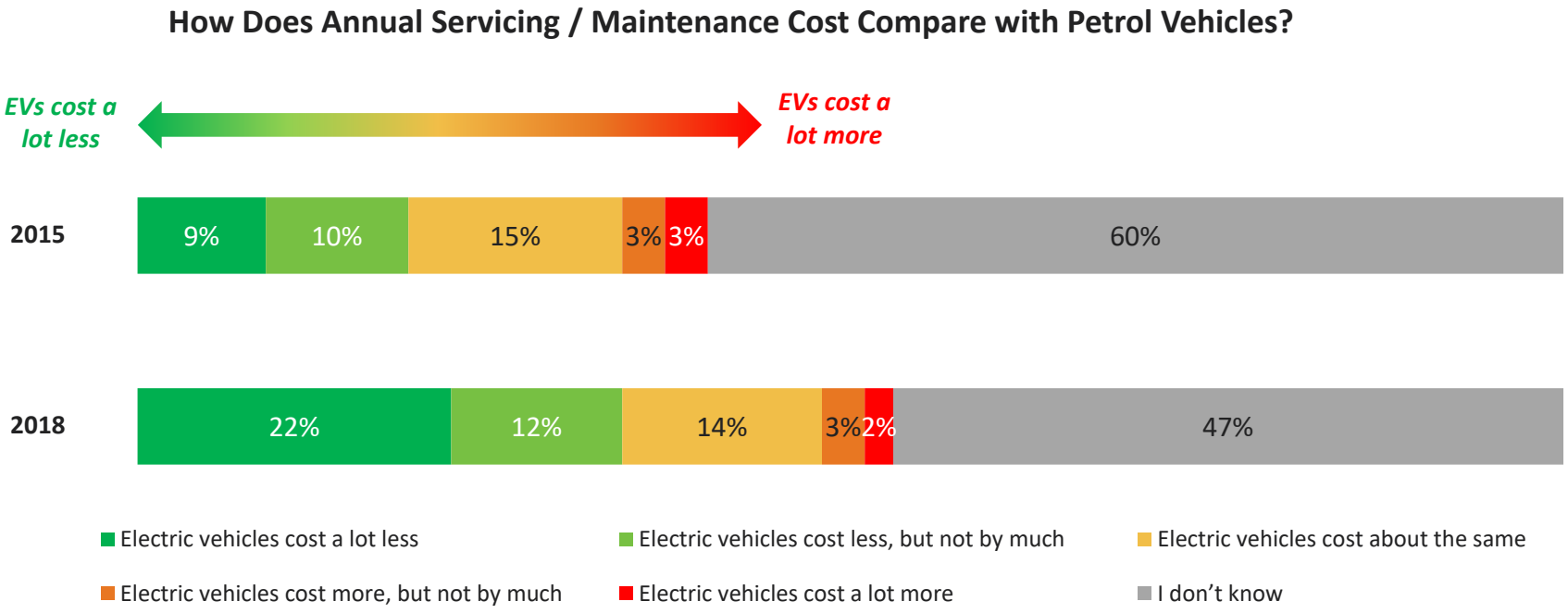
Base: *Total sample (n=200)*

Over half of businesses believe that EVs will be cheaper to 'recharge' than petrol vehicles, showing considerable increases since 2015



EV12 *How would the annual electricity cost for running an electric vehicle compare with the annual fuel cost for petrol cars of the same age?*
Base: *Total sample – 2018 (n=200), 2015 (n=199)*

Fleet managers are still uncertain of how the annual servicing / maintenance costs of EVs compare to those of petrol vehicles



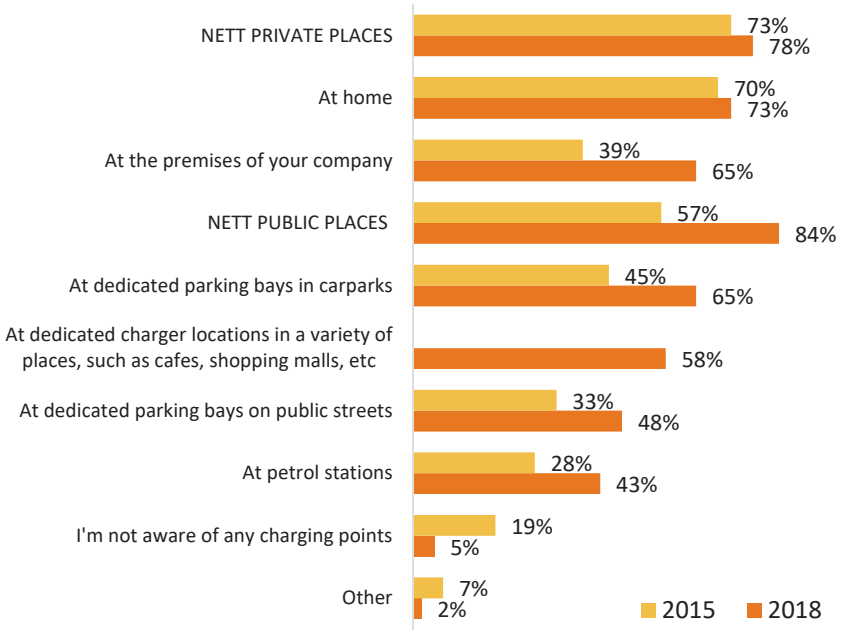
EV13 *How would the annual servicing / maintenance cost for running an electric vehicle compare with the servicing / maintenance cost for petrol cars of the same age?*

Base: *Total sample – 2018 (n=200), 2015 (n=199)*

Overall, awareness of charging points is higher than 2015 and only 18% believe that it will be very difficult to install charging points at their place of work

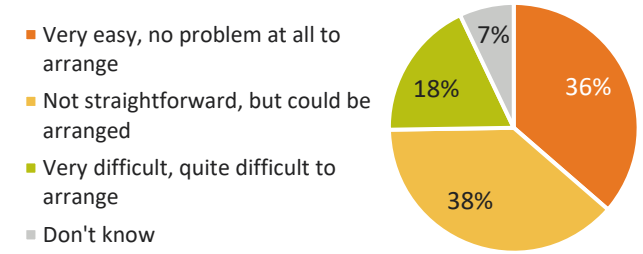
Where You Can Find Charging Points

(n=200)



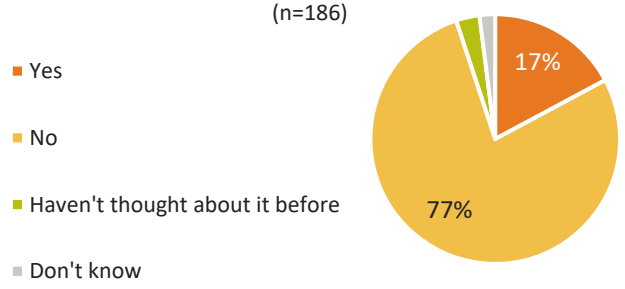
Ease of Installing Charging Points

(n=200)



Ease of Installing Charging Points Affecting Consideration

(n=186)

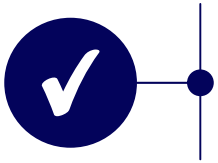


EV9 *In which of the following places do you think you can charge an electric vehicle? /* ***EV10*** *If you were to get electric vehicles for your fleet, how easy would it be to install charging points at your work premises?* ***Base:*** *Total sample (n=200)*

EV11 *Is the potential need to install charging points at work something that has impacted your consideration of purchasing or leasing electric vehicles for your fleet before now?* ***Base:*** *Total sample, excluding those who answered 'don't know' at EV10 (n=186)*

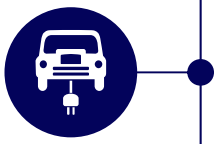
ELECTRIC VEHICLES

Section summary and implications for EV uptake



Compared with the general population sample from the Consumer Monitor, fleet managers are more familiar with electric vehicles. However, they are less favourable towards them and confident that they will be able to meet their needs, indicating that EVs are currently viewed as more appropriate for personal as opposed to business use.

This lack of confidence stems from the notion that EVs are simply not yet at the stage where they can meet the needs of a business. Specifically, fleet managers have concerns around the travel distance, range of models available, and the infrastructure currently in place (e.g. access to charging stations). The upfront cost of EVs also still represents a barrier to consideration.

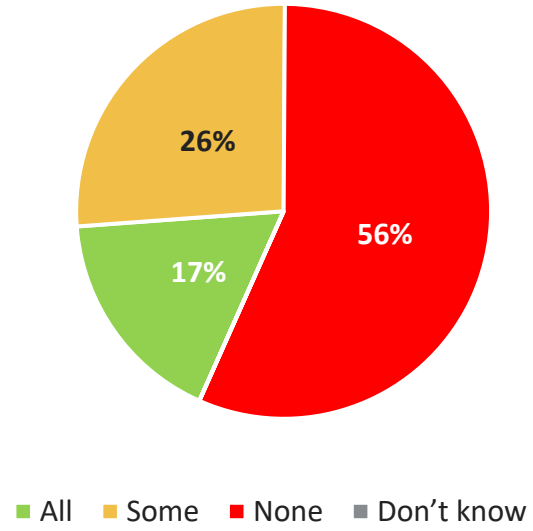


As it currently stands, EVs are very much see as ‘for the future’ as opposed to ‘for now’. Consideration of EVs is up 14pt compared with the 2015 study, and we can also see improvements in the overall awareness of charging stations and the perception of EVs being cheaper to run than petrol vehicles. So while perceptions are generally moving in the right direction, EVs are still viewed as an option to consider for the future instead of an alternative that can meet present-day business needs.

APPENDIX

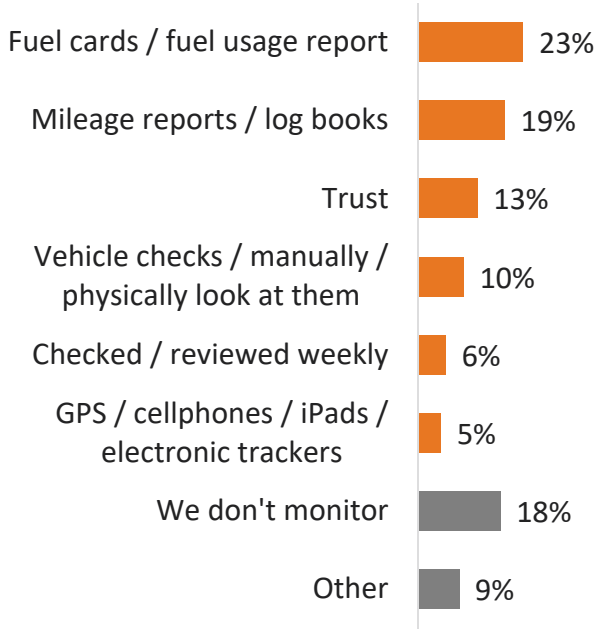
Over half of fleet managers do not use Telematics or GPS to monitor their fleet and within this group, fuel cards and fuel usage reports are the most common form of monitoring

Telematics or GPS
(n=200)



Those who answered 'none'

How Do You Currently Monitor Your Fleet?
(n=114)

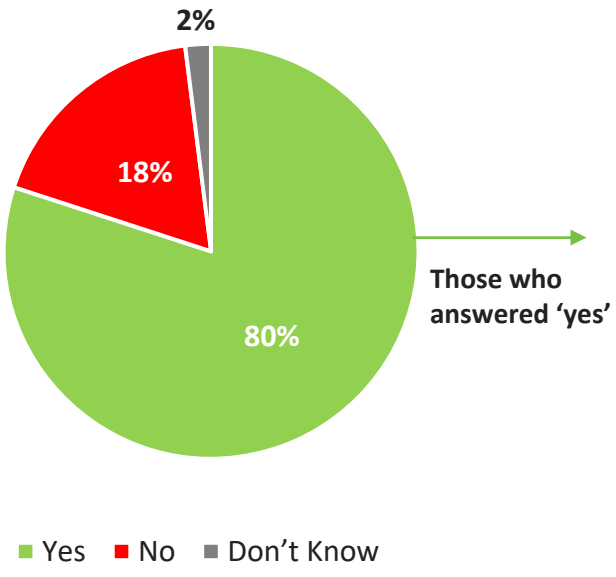


F8 *Do you have a telematics or GPS monitoring on all, some or none of your light vehicles?* ***Base:*** *Total sample (n=200)*
F9 *How do you currently monitor your fleet?* ***Base:*** *Those who don't use Telematics or GPS (n=114).* ***Note:*** *Only responses above 5% are shown.*

Some 80% of fleet managers say they audit their fleet, with just under half of those undertaking some kind of audit at least every 12 months

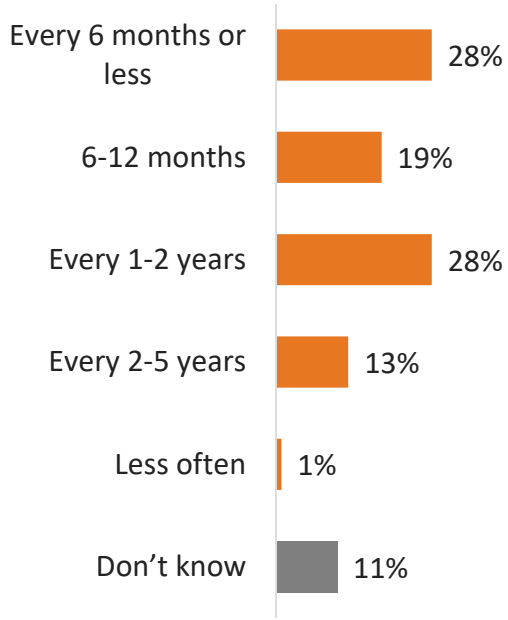
Do You Undertake Audits?

(n=200)



How Often Do You Undertake Audits?

(n=160)



Although reported levels of fleet auditing appears to be high, the depth and sophistication of the auditing practices vary across business type, with size of fleet being a key determiner.

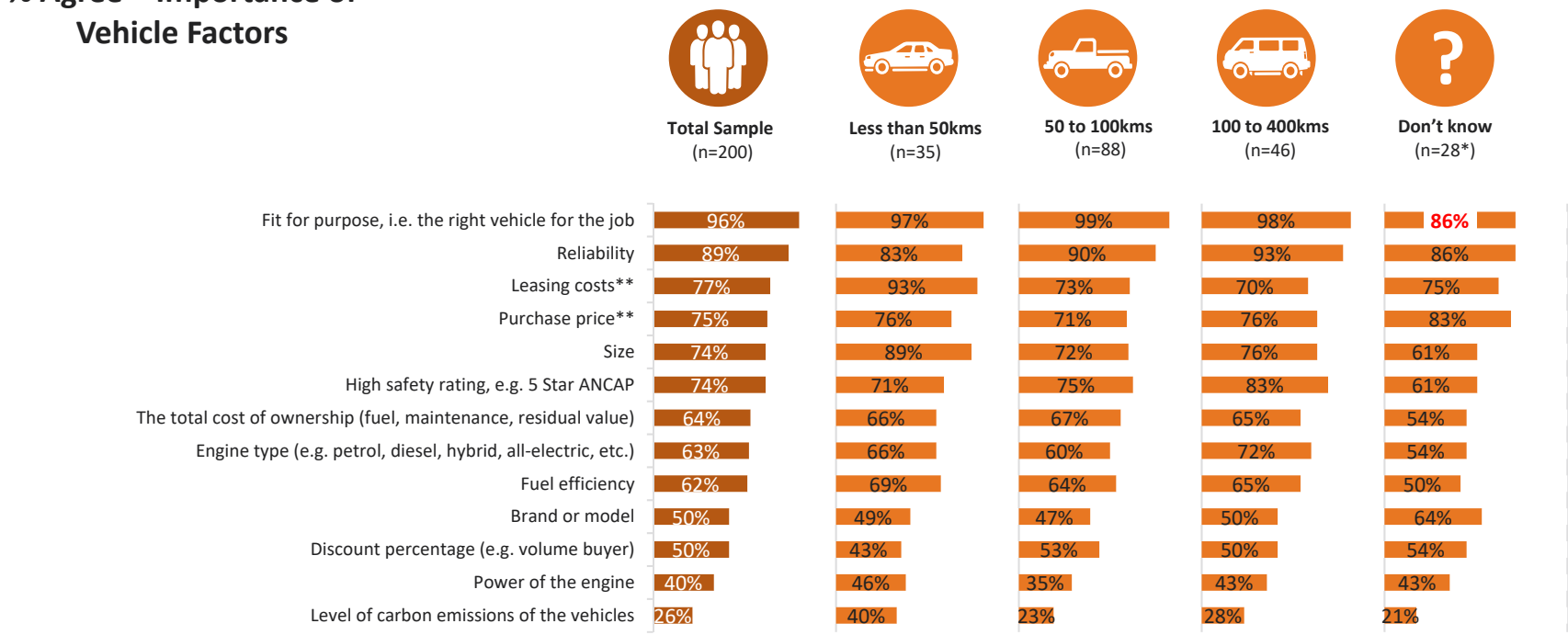
"We rely on users confirming their mileage, WOF, etc. We track it on an excel spreadsheet. It's not overly sophisticated."

F10 *Do you undertake audits of your fleet? by audits I mean where you look at what vehicles are needed for the business in terms of use, needs, etc., and recommendations are made off the back??* ***Base:*** *Total sample (n=200)*

F11 *How often do you undertake audits?* ***Base:*** *Those who undertake audits (n=160)*

Safety rating becomes a more important factor as distance driven per day increases for the purchasing / leasing of vehicles for business fleets

% Agree – Importance of Vehicle Factors



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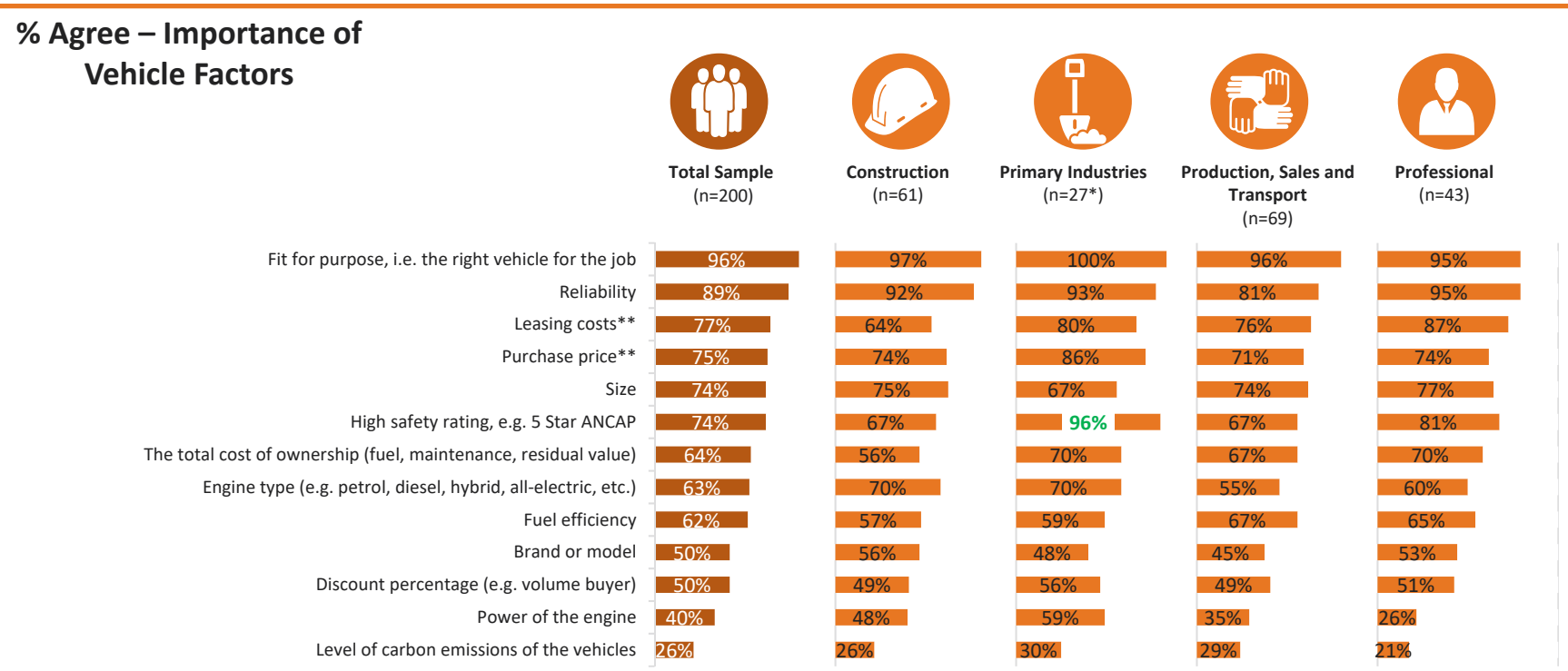
F15 *On a scale from 1 to 5 where 1 is 'not at all important' and 5 is 'extremely important', please tell me how important or unimportant each factor was in the most recent fleet purchase or lease decision made by your company / the company you work for? /* ***F7*** *Thinking about the average light vehicle currently operated by your company, approximately how many kilometres would they travel in a typical day?*

Base: *Total sample (n=200).* ***Note:*** *3 respondents travel more than 400km.* ****Warning:*** *Low base size.* *****Note:*** *Asked only of some respondents.*

Those in primary industries were significantly more likely to believe that a *high safety rating* is an important factor when purchasing / leasing fleet vehicles

% Agree – Importance of Vehicle Factors



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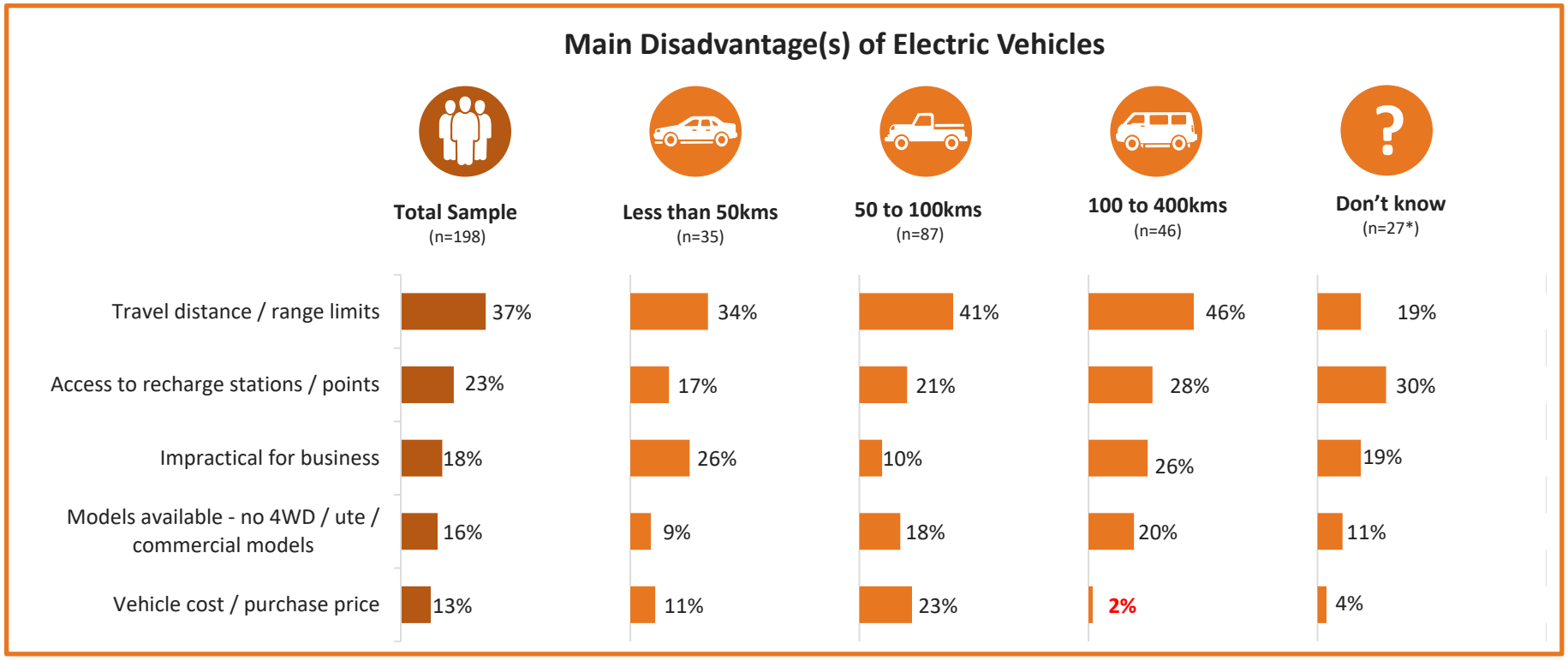
F15 *On a scale from 1 to 5 where 1 is 'not at all important' and 5 is 'extremely important', please tell me how important or unimportant each factor was in the most recent fleet purchase or lease decision made by your company / the company you work for?* / ***C1*** *Which sector does your company primarily operate in?*

Base: *Total sample (n=200).* ****Warning:*** *Low base size.* *****Note:*** *Asked only of some respondents.*

Travel distance is a key disadvantage for all and as driving distance increases, *access to recharge stations* becomes more of a prevalent disadvantage



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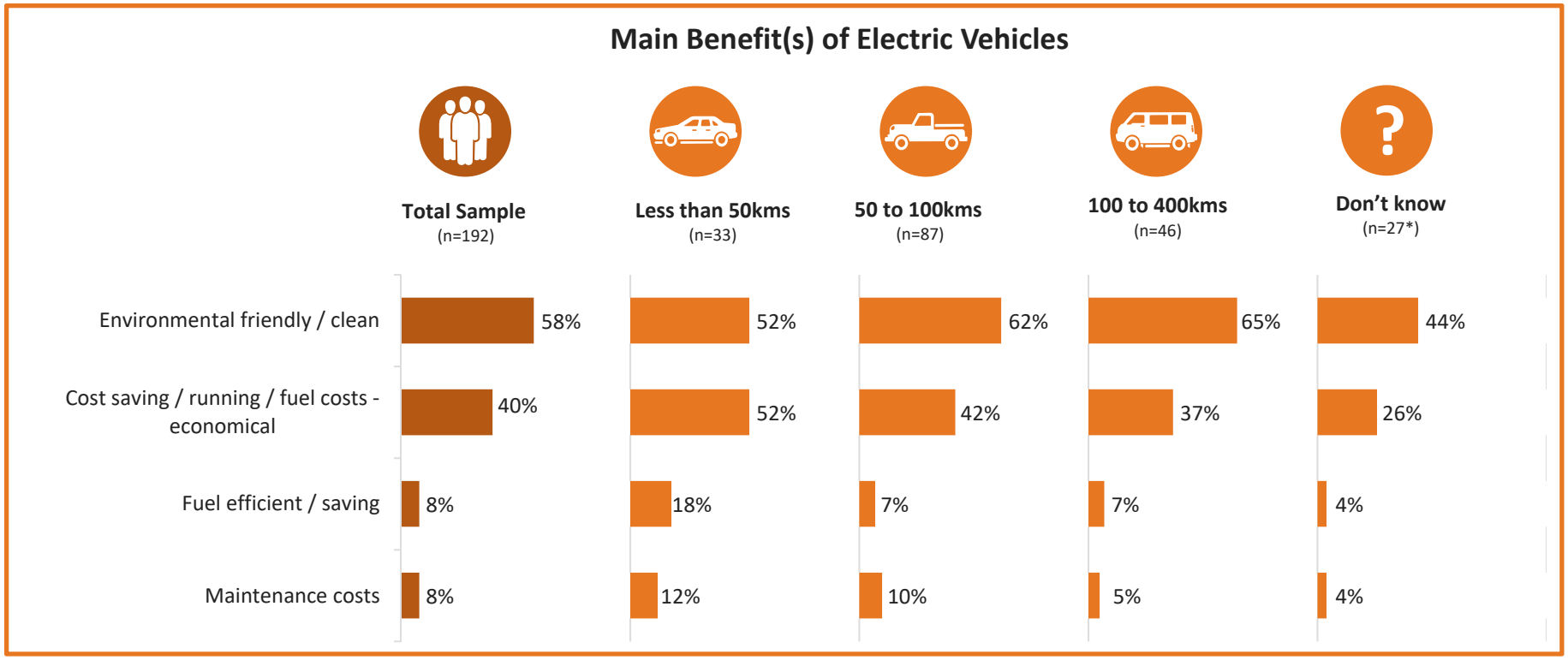
***EV7** What do you consider to be the main disadvantage or disadvantages, if any of electric vehicles over purely petrol / diesel powered vehicles? / **F7** Thinking about the average light vehicle currently operated by your company, approximately how many kilometres would they travel in a typical day?*

***Base:** Total sample (n=198). **Note:** 3 respondents travel more than 400km. ***Warning:** Low base size.*

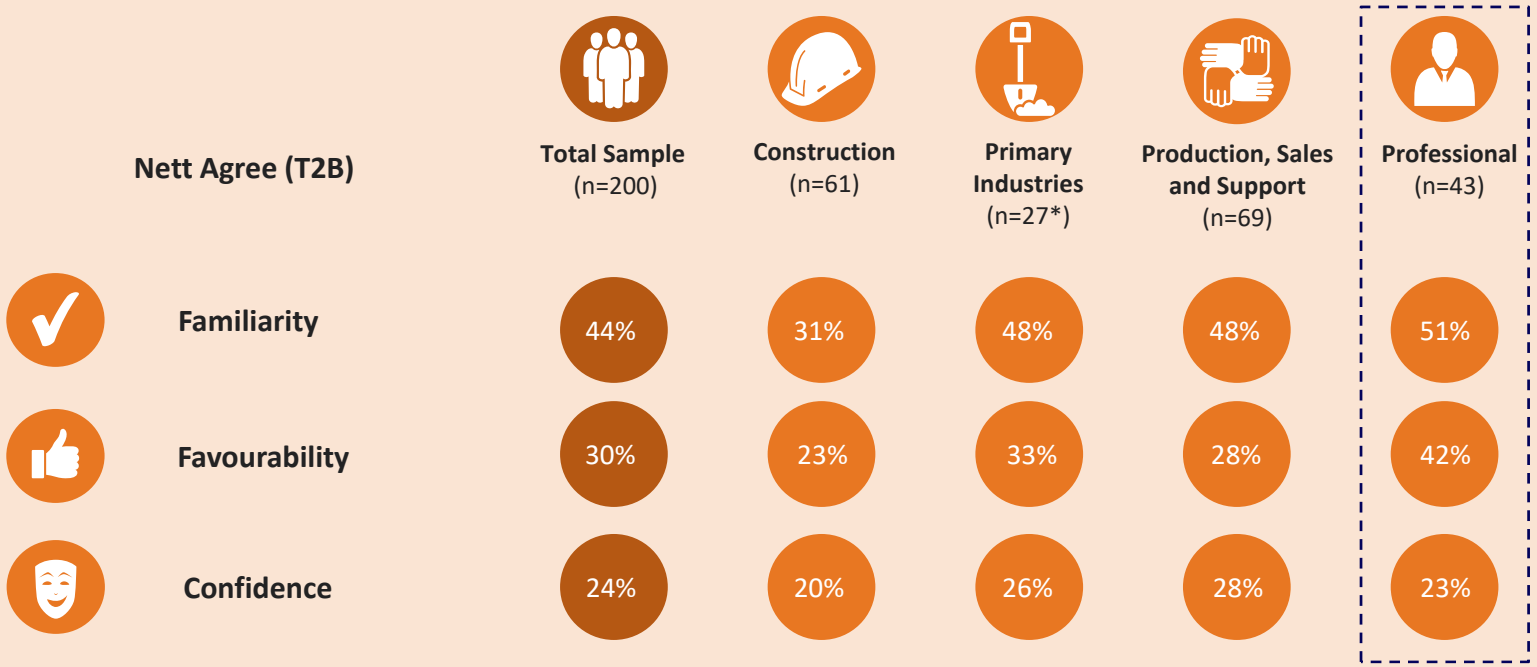
Fleet managers with vehicles that travel less than 50km a day are more likely to believe that a main benefit of electric vehicles are the *savings* associated



EV6 *What do you consider to be the main benefit or benefits, if any of electric vehicles over purely petrol / diesel powered vehicles? /* ***F7*** *Thinking about the average light vehicle currently operated by your company, approximately how many kilometres would they travel in a typical day?*

Base: *Total sample (n=192).* ***Note:*** *3 respondents travel more than 400km.* ****Warning:*** *Low base size.*

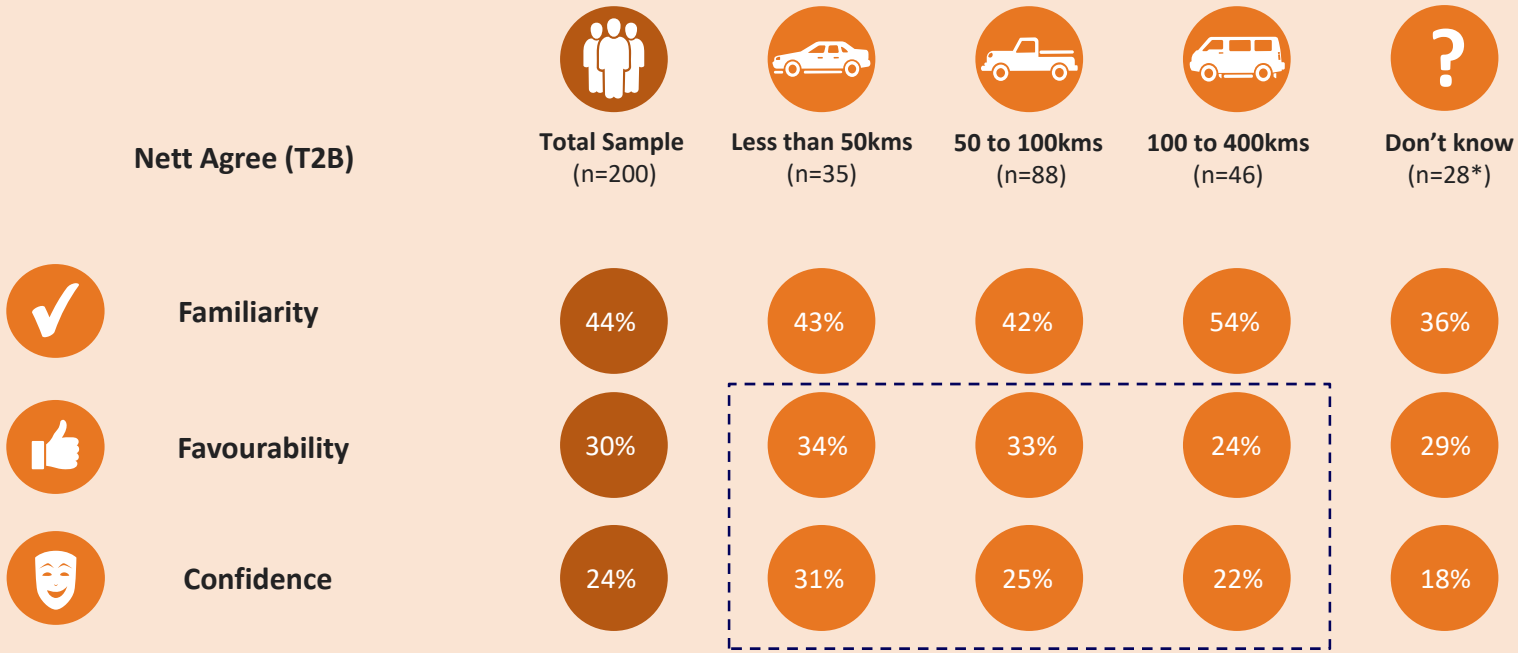
Professionals are more *favourable* towards EVs; however, this does not flow through to confidence they can meet their needs



EV1 *How would you rate your familiarity with Electric Vehicles? /* ***EV2*** *How favourable or unfavourable is your overall opinion or impression of Electric Vehicles for business use? /* ***EV3*** *To what extent are you confident that Electric Vehicles can meet the needs of your business?*

Base: *Total sample (n=200).* ****Warning:*** *Low base size.*

Fleet managers' *favourability* and *confidence* regarding EVs decrease as the travel distance their fleet travels increases

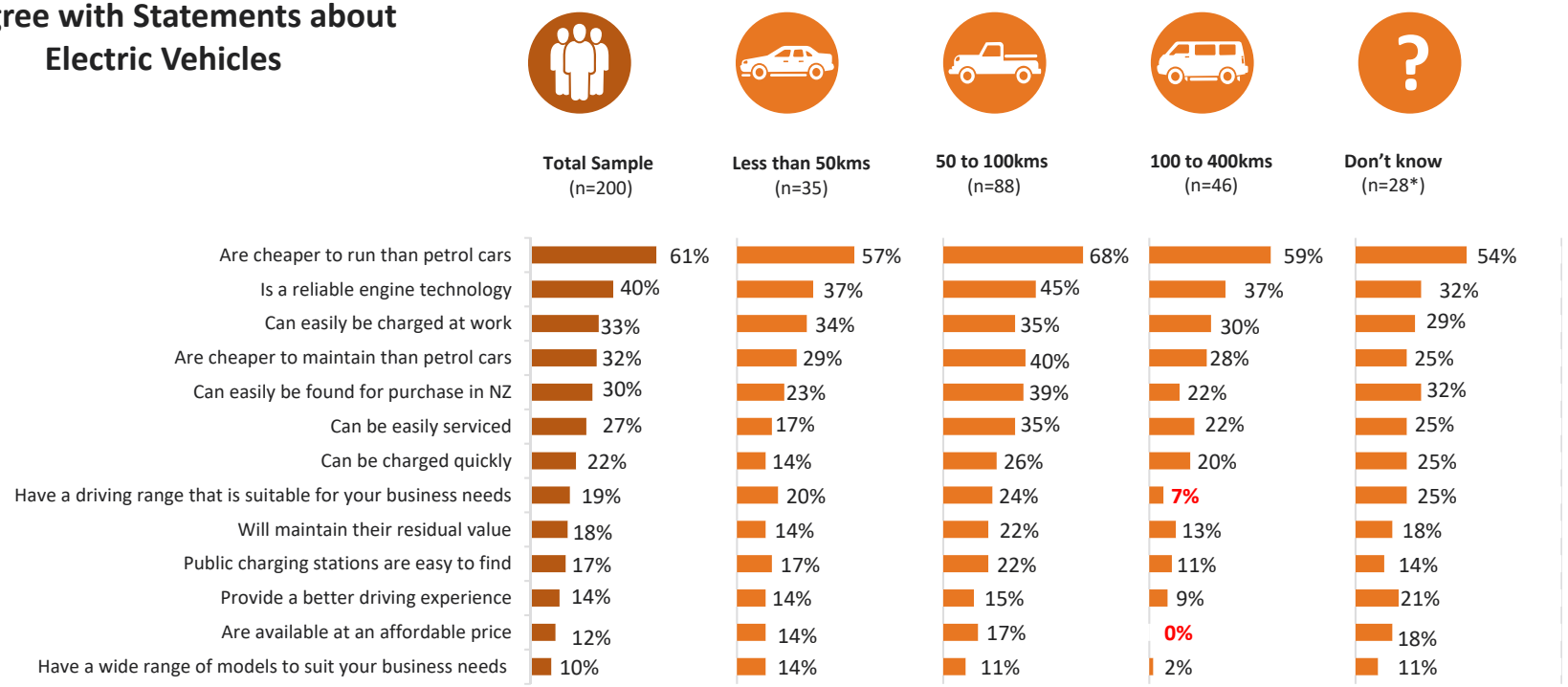


EV1 *How would you rate your familiarity with Electric Vehicles? /* ***EV2*** *How favourable or unfavourable is your overall opinion or impression of Electric Vehicles for business use? /* ***EV3*** *To what extent are you confident that Electric Vehicles can meet the needs of your business? /* ***F7*** *Thinking about the average light vehicle currently operated by your company, approximately how many kilometres would they travel in a typical day?*

Base: *Total sample (n=200).* ***Note:*** *3 respondents travel more than 400km.* ****Warning:*** *Low base size.*

Fleet managers with fleets that drive 100 to 400kms were less likely to believe that EVs have a *driving range that is suitable for their businesses needs*

% Agree with Statements about Electric Vehicles



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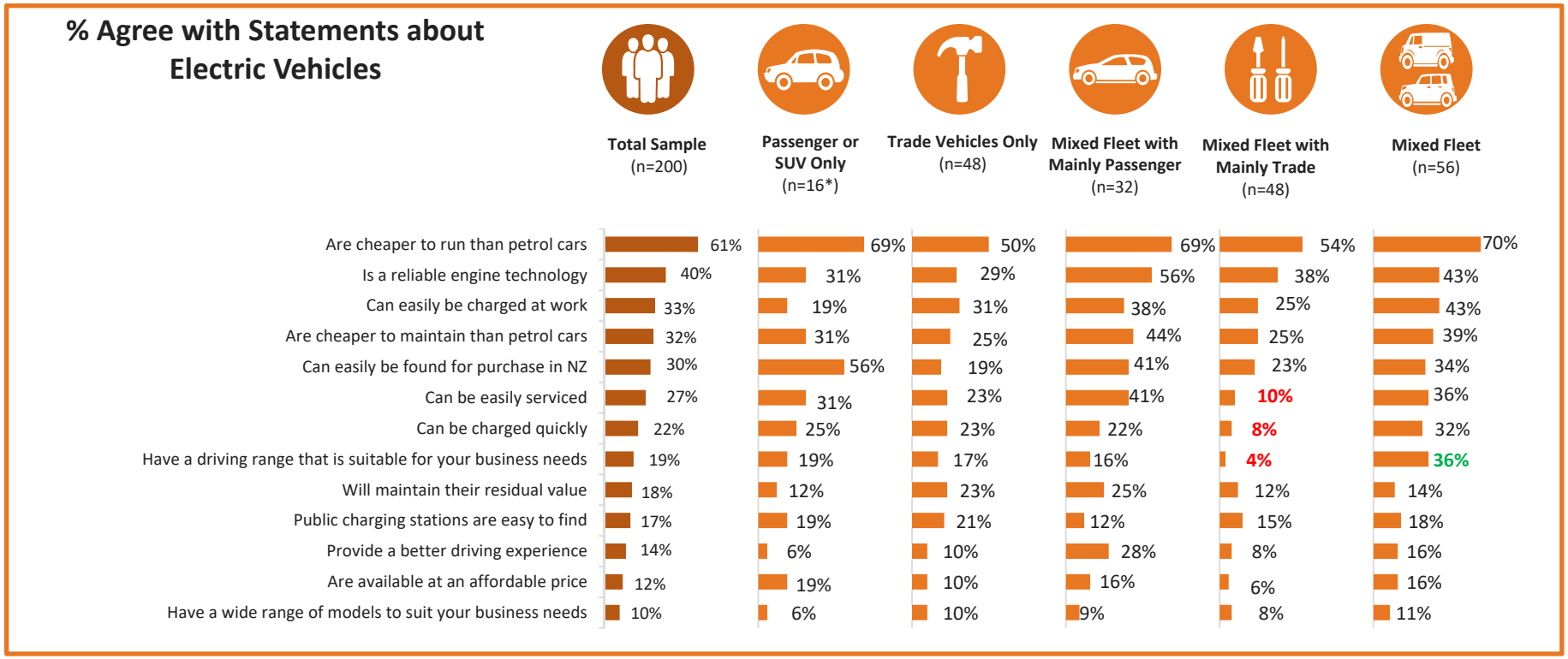
EV8 *Now I'm going to read out a list of statements about electric vehicles from a business perspective, please tell me how strongly do you agree or disagree with each of the following statements? /* ***F7*** *Thinking about the average light vehicle currently operated by your company, approximately how many kilometres would they travel in a typical day?*

Base: *Total sample (n=200).* ***Note:*** *3 respondents travel more than 400km.* ****Warning:*** *Low base size.*

Those with a mixed fleet with mainly trade are less likely to believe that EVs can be *easily serviced*, *charged quickly* and have a *suitable driving range*



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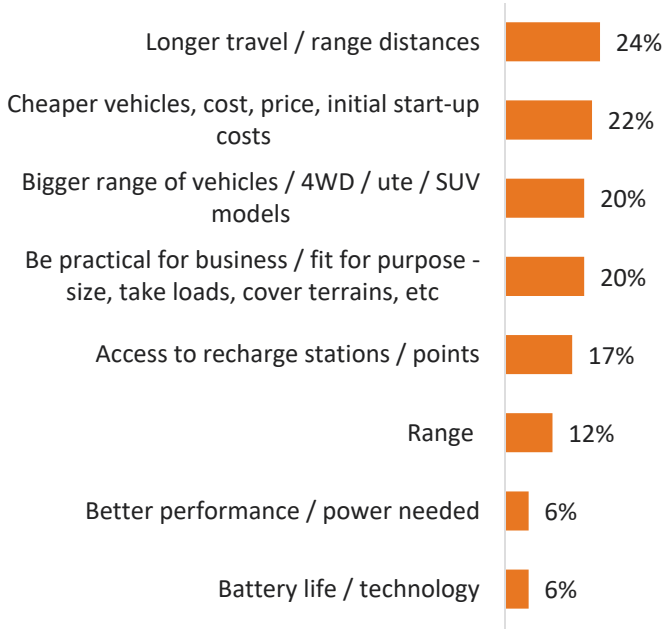
EV8 Now I'm going to read out a list of statements about electric vehicles from a business perspective, please tell me how strongly do you agree or disagree with each of the following statements? / F3 Which of the following ownership types does your vehicle fleet fall?

***Base:** Total sample (n=200). ***Warning:** Low base size.*

Longer travel distances and a *reduction in initial costs* are the most important changes required for businesses to consider EVs

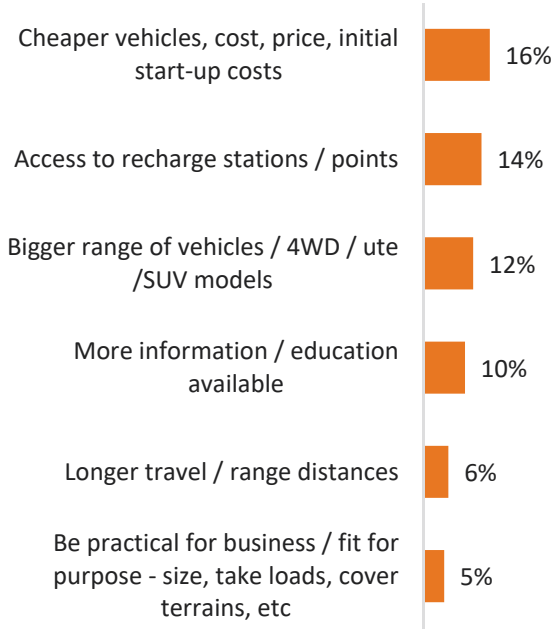
Most Important Change Required to Consider EVs

(n=200)



Needs to Happen to Make EVs More Attractive

(n=200)



EV14 *Thinking about all the reasons your business might have against using electric vehicles, can you tell me what would the most important thing that you would need to be convinced has changed to consider them more as an option? /* ***EV14A*** *Is there anything else needs to happen before electric vehicles can be a more attractive fleet vehicle option?*

Base: *Total sample (n=200)****. Note:*** *Only responses 5% and above shown.*

Contacts

Information withheld under section 9(2)(a)

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Te Tari Tiaki Pūngao

DRAFT

QUARTERLY REPORT: Q1 JUL-SEP 2018

EECA Consumer Monitor

PREPARED FOR: EECA

PREPARED BY: IPSOS

CONTACT: INFORMATION WITHHELD UNDER SECTION 9(2)(A)

GAME CHANGERS

RESEARCH OBJECTIVES & METHODOLOGY

Research objectives

- EECA's Consumer Monitor tracks the awareness, attitudes and behaviours of New Zealanders in relation to energy efficiency, conservation and renewable energy. It provides a snapshot of what New Zealanders are thinking.
  - These trends have been monitored in varying degrees since March 2008.

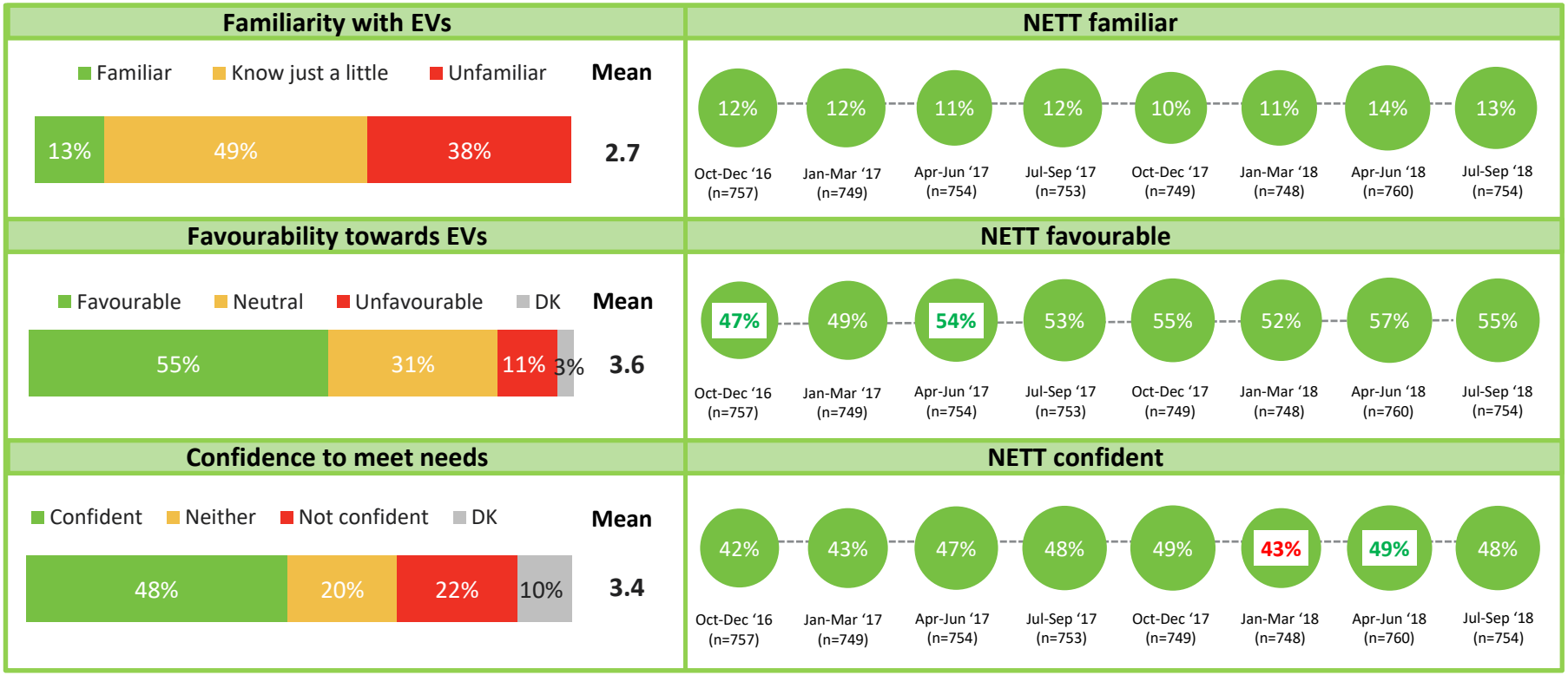
- The EECA Consumer Monitor for Jul-Sep 2018 measured:
  - Awareness of all main EECA brands.
  - Recall and impact of the EV Brand Ad module.
  - Recall and impact of the *3 Essentials* campaign.
  - Continued tracking of attitudes and perceptions towards Electric Vehicles.
  - Tracking of the effectiveness of the EECA EV campaign (from December 2017).
  - How consumers seek information about energy-efficient practices.
  - Tracking of the effectiveness of the EECA Rightware campaign (from July 2018).

Research methodology

- EECA's Consumer Monitor is conducted via an online survey. This quarter (July to September 2018), the sample comprises a general population sample from the Research Now panel (n=754).
- The sample is randomly selected based on the 2013 Census data.
- The margin of error on a sample size of 754 is ±3.57% for estimates of 50% at the 95% confidence interval.
- This report contains quarterly and 12-month rolling figures. The 12-month rolling data increases the sample size per measure to n=3,011 for the year to Sep 2018, with a margin of error of ±1.79% for estimates of 50% at the 95% confidence interval.
- The sample is weighted to be representative of the 2013 Census by age, gender and region.
- Interviews were collected from 4th July to 2nd October 2018 and the average interview duration was approximately 20 minutes.
- For the NZ population calculations, the figure used is 4,909,790 from the Statistics NZ estimate as at 9th October 2018.
- Please note that all 12-month rolling figures show the yearly results on a quarterly basis (i.e. the year to March 2013, followed by the year to June 2013, and so on).

ELECTRIC VEHICLES

Familiarity, favourability and *confidence* in Electric Vehicles have remained fairly stable this quarter

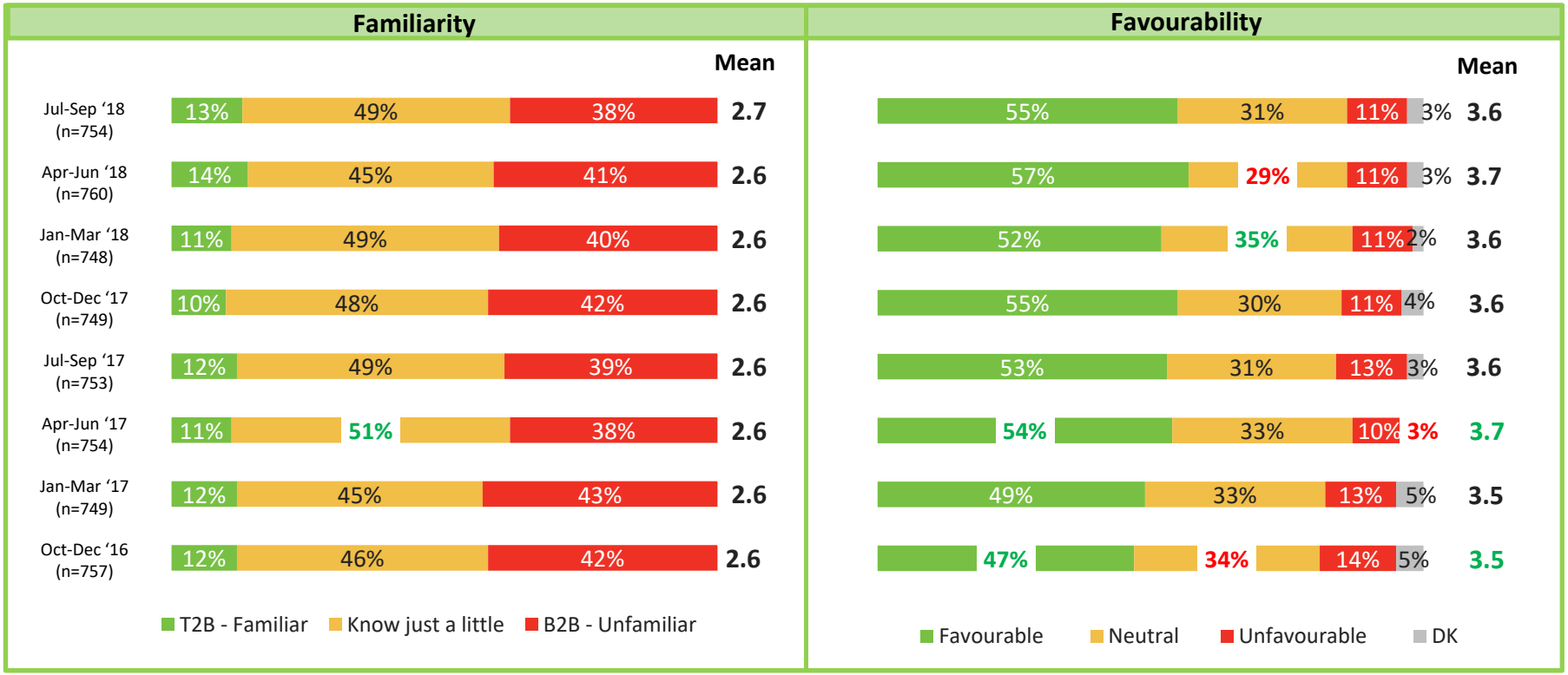


Green is sig. ↑, Red is sig. ↓ than previous quarter

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?*

Base: *Total sample*

Familiarity and *favourability* towards Electric Vehicles have remained fairly stable this quarter; both measures sit at a higher level than the same period last year



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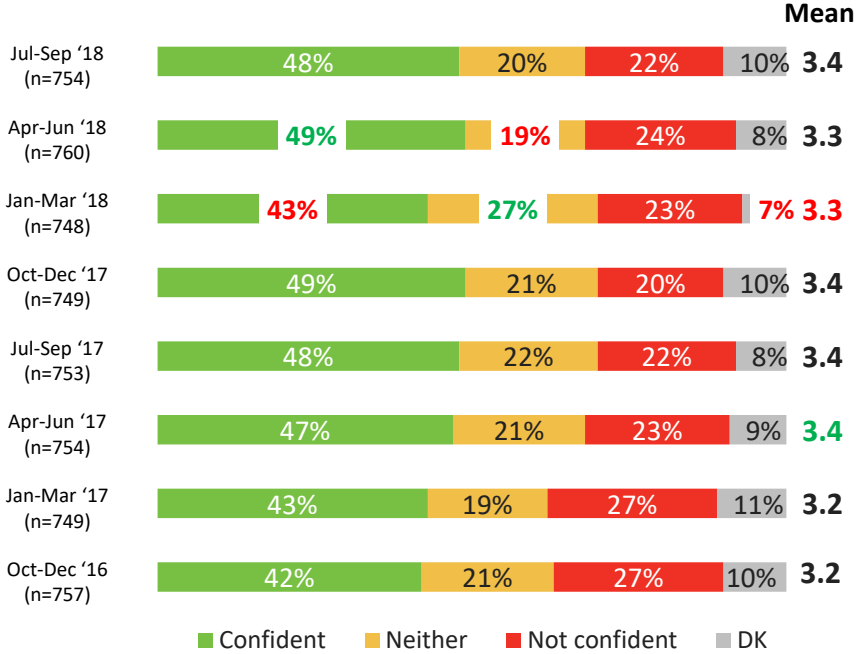
EV3 *How would you rate your familiarity with Electric Vehicles?* / ***EV4*** *How favourable or unfavourable is your overall opinion or impression of Electric Vehicles?*

Base: *Total sample*

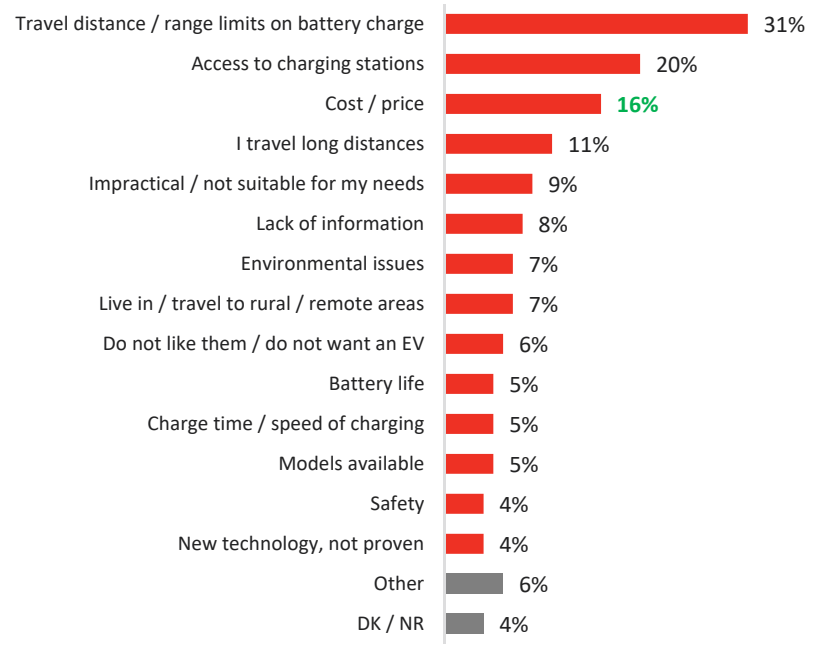
Confidence remains stable this quarter; *travel distance* continues to be the largest concern amongst those not confident that Electric Vehicles can meet their needs

Confidence to meet needs



Reasons for lack of confidence

Jul-Sep '18 (n=173)



Green is sig. ↑, Red is sig. ↓ than previous quarter

EV5 *To what extent are you confident that Electric Vehicles can meet your needs?* / ***EV5a*** *Why are you not confident that Electric Vehicles can meet your needs?*

Base: *Total sample / Those not confident about RVs (n=173).* ***Note:*** *Only responses 3% and above shown.*

ELECTRIC VEHICLES

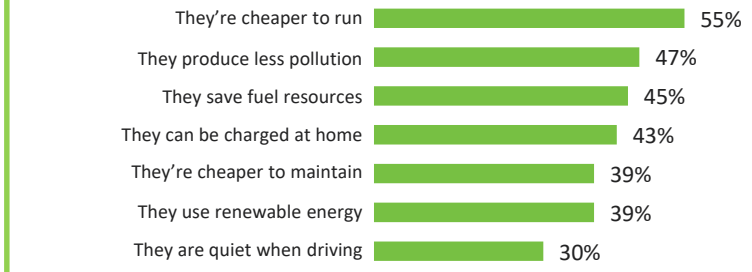
Consideration of EVs has softened following a historic high last quarter, whilst consideration of PHEVs and hybrids has reached new historic highs

NETT likely to consider

	Oct-Dec '16 (n=712)	Jan-Mar '17 (n=716)	Apr-Jun '17 (n=718)	Jul-Sep '17 (n=717)	Oct-Dec '17 (n=707)	Jan-Mar '18 (n=717)	Apr-Jun '18 (n=715)	Jul-Sep '18 (n=714)
Battery EV	19%	21%	19%	**26%**	26%	26%	**33%**	30%
Plug-in hybrid	25%	24%	27%	29%	27%	29%	33%	34%
Hybrid vehicle	29%	30%	28%	33%	32%	32%	34%	38%
Petrol vehicle	**74%**	**74%**	**75%**	**71%**	**73%**	**79%**	**75%**	**79%**
Diesel vehicle	**25%**	**24%**	**25%**	**22%**	**26%**	**26%**	**26%**	**26%**

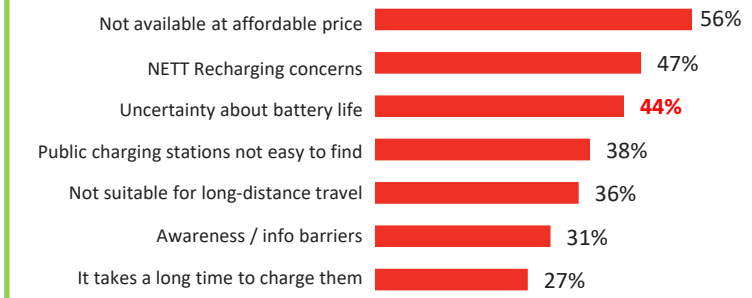
Why would consider EVs

(n=714)



Why would not consider EVs

(n=714)



Note: *Top-7 reasons for considering and not considering shown in charts.*

Green is sig. ↑, Red is sig. ↓ than previous quarter

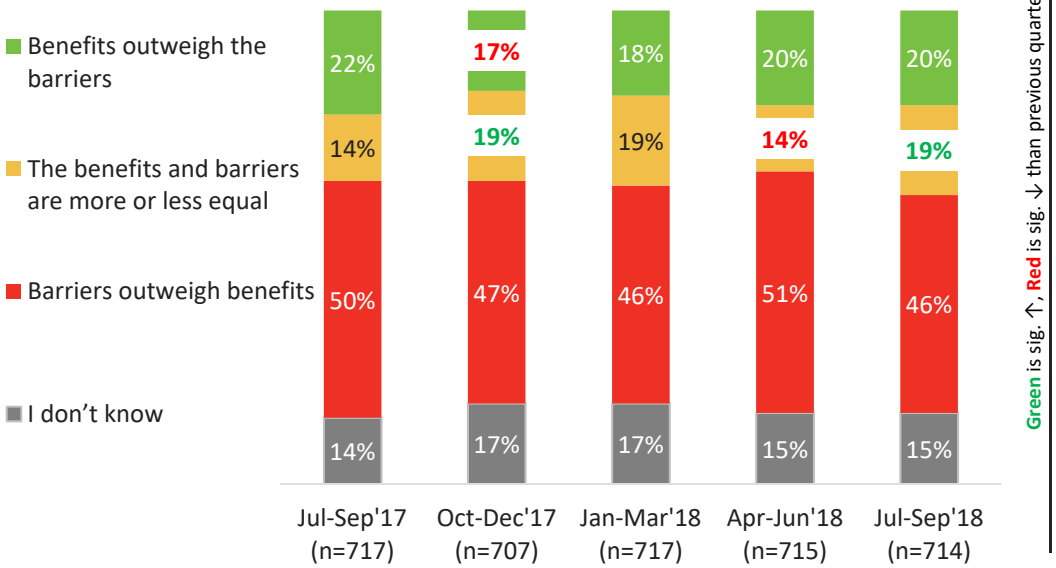
Q177 *How likely are you to consider the following vehicles?* / ***Q178*** *What is it about electric vehicles that makes you likely to consider them?* / ***Q179*** *What is it about electric vehicles that makes you unlikely to consider them?* ***Note:*** *Q177, Q178 and Q179 were asked of all current or intended car buyers from Apr-Jun '17 onwards.*

Base: *Current / intended car owners*

GAME CHANGERS

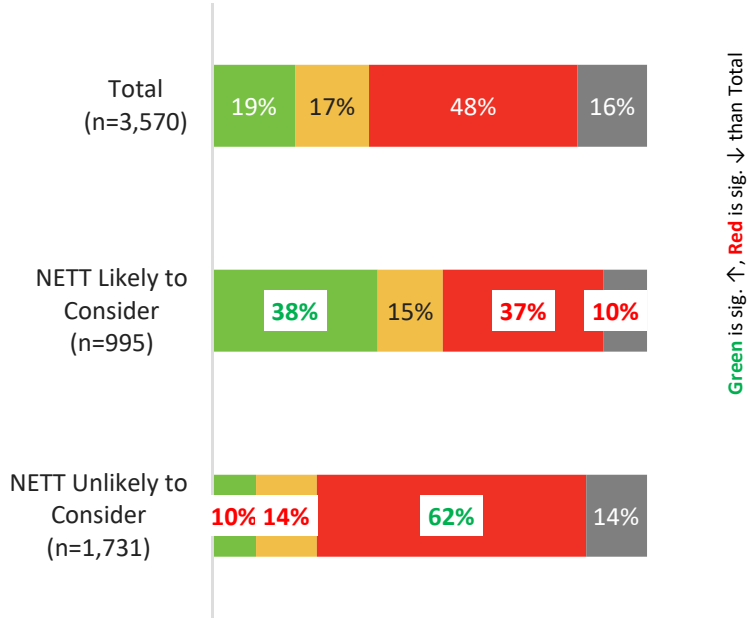
Belief that the benefits of EVs outweigh the barriers has remained stable; considerers of EVs are more likely to believe that benefits outweigh barriers

Benefits vs. barriers – Over time



Green is sig. ↑, Red is sig. ↓ than previous quarter

Benefits vs. barriers – BEV consideration



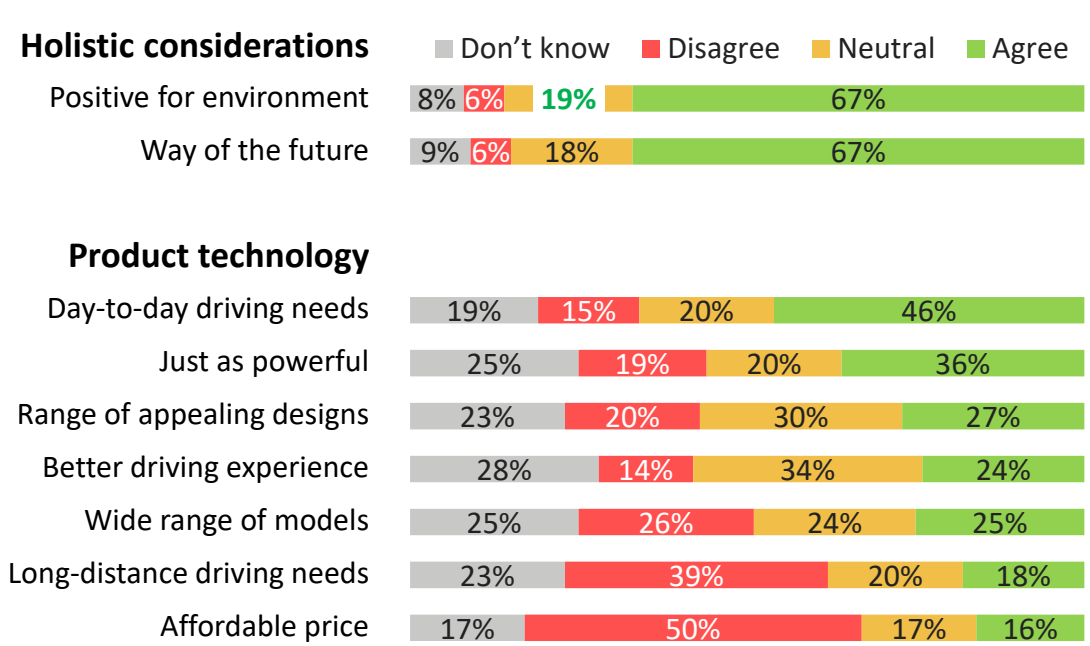
Green is sig. ↑, Red is sig. ↓ than Total

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: *Jul '17-Sep'18 – Current car owners / Intended owners*

All measures have remained fairly stable this quarter; *affordability* has reached its highest score since tracking of this metric began

Statements about Electric Vehicles



% Agree

	Apr-Jun'18	Jan-Mar'18	Oct-Dec'17	Jul-Sep'17	Apr-Jun'17	Jan-Mar'17
Holistic considerations						
Positive for environment	71%	70%	72%	71%	**75%**	67%
Way of the future	70%	70%	70%	69%	**70%**	65%
Product technology						
Day-to-day driving needs	47%	46%	46%	45%	44%	N/A
Just as powerful	35%	33%	29%	31%	28%	N/A
Range of appealing designs	25%	26%	27%	26%	22%	N/A
Better driving experience	22%	25%	22%	21%	19%	20%
Wide range of models	22%	21%	22%	**21%**	**16%**	21%
Long-distance driving needs	18%	19%	18%	19%	18%	N/A
Affordable price	15%	14%	12%	14%	13%	14%

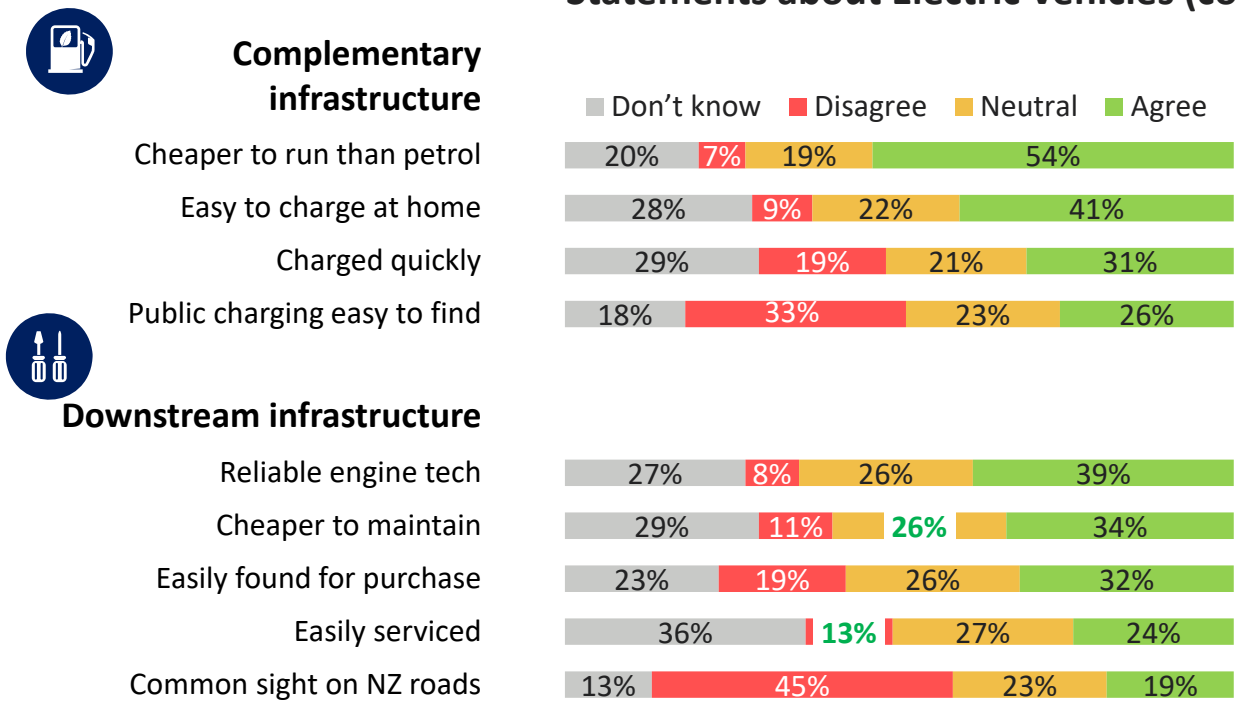
Green is sig. ↑, Red is sig. ↓ than previous quarter

EV6 *For each of the following statements, please select the answer that best describes how you feel about Electric Vehicles.*

Base: *Total sample: Jul-Sep '18 (n=754), Apr-Jun '18 (n=760), Jan-Mar '18 (n=748), Oct-Dec '17 (n=749), Jul-Sep '17 (n=753), Apr-Jun '17 (n=754), Jan-Mar '17 (n=749)*

Over time there has been a gradual increase in positive views about the provision of complementary and downstream infrastructure for EVs

Statements about Electric Vehicles (cont.)



% Agree

	Apr-Jun' 18	Jan-Mar'18	Oct-Dec'17	Jul-Sep'17	Apr-Jun'17	Jan-Mar'17
Complementary infrastructure						
Cheaper to run than petrol	**57%**	52%	52%	50%	55%	54%
Easy to charge at home	45%	43%	41%	40%	37%	N/A
Charged quickly	29%	26%	27%	27%	**26%**	20%
Public charging easy to find	24%	23%	21%	19%	18%	N/A
Downstream infrastructure						
Reliable engine tech	41%	37%	38%	39%	40%	N/A
Cheaper to maintain	38%	37%	35%	35%	32%	28%
Easily found for purchase	32%	30%	28%	27%	23%	N/A
Easily serviced	26%	23%	25%	23%	20%	N/A
Common sight on NZ roads	17%	18%	14%	**13%**	9%	N/A

Green is sig. ↑, **Red** is sig. ↓ than previous quarter

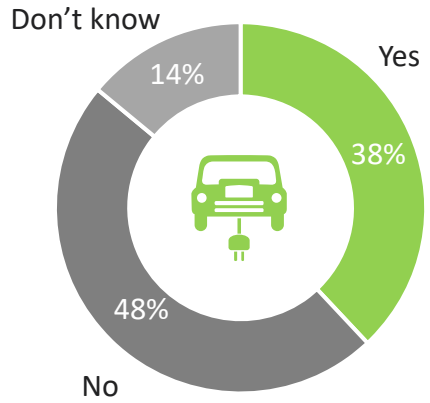
EV6 *For each of the following statements, please select the answer that best describes how you feel about Electric Vehicles.*

Base: *Total sample: Jul-Sep '18 (n=754), Apr-Jun '18 (n=760), Jan-Mar '18 (n=748), Oct-Dec '17 (n=749), Jul-Sep '17 (n=753), Apr-Jun '17 (n=754), Jan-Mar '17 (n=749)*

ELECTRIC VEHICLES

Recall of any EV advertising has remained fairly stable this quarter; TV remains the most recalled channel, whilst online and outdoor media has softened

Heard or seen any EV advertising in the past 3 months
Jul-Sep '18 (n=754)



	Oct-Dec'17	Jan-Mar'18	Apr-Jun'18
% YES	30%	31%	42%

Where recall any EV advertising from
(those who recall EV advertising)

TV		Newspaper / Magazine		Radio		App	
Apr-Jun '18 (n=314)	Jul-Sep '18 (n=293)	Apr-Jun '18 (n=314)	Jul-Sep '18 (n=293)	Apr-Jun '18 (n=314)	Jul-Sep '18 (n=293)	Apr-Jun '18 (n=314)	Jul-Sep '18 (n=293)
64%	**67%**	**21%**	**19%**	**15%**	**16%**	**2%**	**2%**
27% of total	*25% of total*	*9% of total*	*7% of total*	*6% of total*	*6% of total*	*1% of total*	*1% of total*

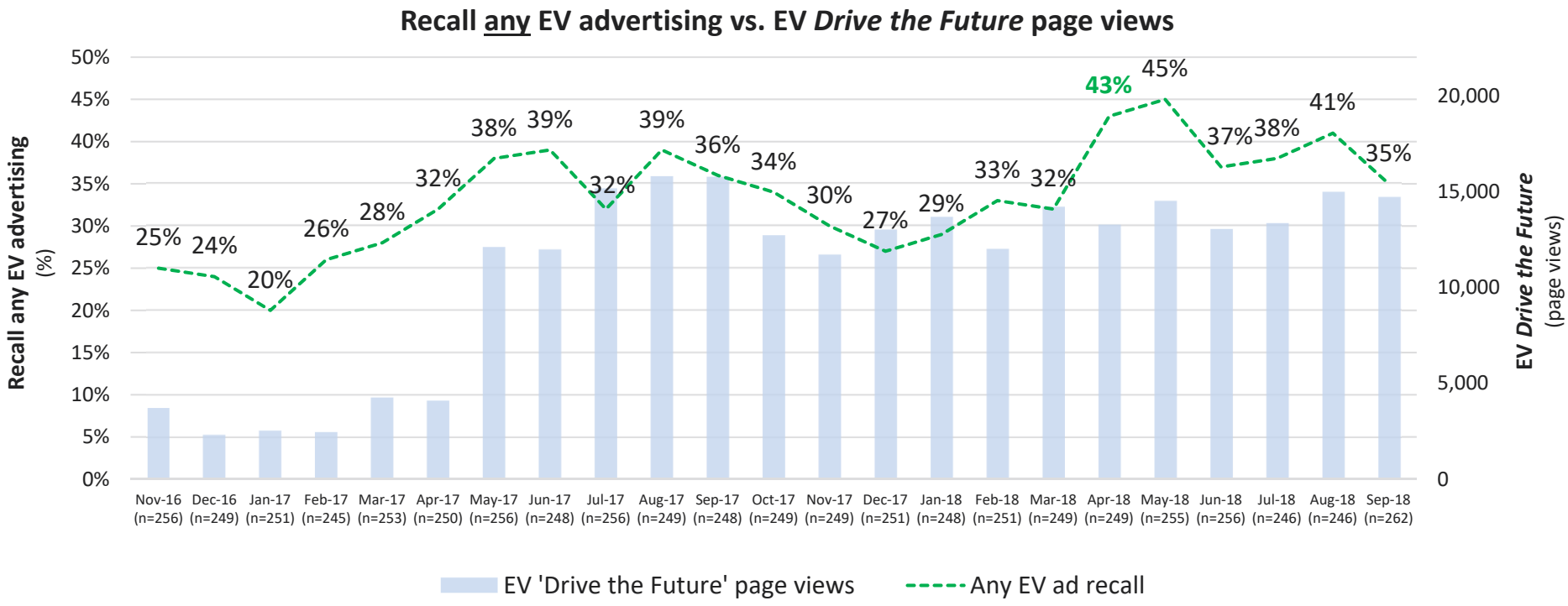
Online		Social Media		Outdoors (Billboards / Posters)		Mailers	
Apr-Jun '18 (n=314)	Jul-Sep '18 (n=293)	Apr-Jun '18 (n=314)	Jul-Sep '18 (n=293)	Apr-Jun '18 (n=314)	Jul-Sep '18 (n=293)	Apr-Jun '18 (n=314)	Jul-Sep '18 (n=293)
30%	**23%**	**12%**	**13%**	**11%**	**8%**	**3%**	**1%**
12% of total	*9% of total*	*5% of total*	*5% of total*	*5% of total*	*3% of total*	*1% of total*	*1% of total*

Green is sig. ↑, Red is sig. ↓ than previous quarter

***EV1** Have you seen or heard any advertising for Electric Vehicles in the past 3 months? / **EV2** Where did you hear or see advertising for Electric Vehicles?*

***Base:** Total sample: Oct-Dec '17 (n=749), Jan-Mar '18 (n=748), Apr-Jun '18 (n=760), Jul-Sep '18 (n=754) / Those who recall advertising*

EV 'Drive the Future' page views follow a similar trend to any EV advertising views



EV1 *Have you seen or heard any advertising for Electric Vehicles in the past 3 months?*
Base: *Total sample.* ***Source:*** *Google analytics data as at 11/10/18.*

Summary – Electric Vehicles

- Familiarity, favourability and confidence in EVs have remained fairly stable this quarter, after historic highs for familiarity and favourability last quarter.
  - Confidence has remained stable after recovering from a decline in Jan-Mar ‘18.
  - *Travel distance* and *access to charging stations* are key reasons cited for lack of confidence in Electric Vehicles.
- Consideration of PHEVs and hybrid vehicles has increased this quarter, both reaching historic highs.
  - Consideration of BEVs has softened slightly this quarter, after achieving a historic high last quarter.
  - *Price* and *recharging concerns* remain major deterrents for not considering an Electric Vehicle.
- Perceptions of EVs have remained fairly stable this quarter.
  - Encouragingly, looking at longer-term trends sees complementary and downstream infrastructure measures improving, illustrating the changing views towards the viability of EVs.
- Awareness of <u>any</u> EV advertising has softened this quarter after achieving a historic high last quarter.

Summary – Key Marketing Assets Performance Measures

- ***EV* campaign**
  - ⇨ Recall of the video component of the campaign has built further this quarter, reaching its highest point in September 2018.
  - ⇨ Key takeouts of the campaign are that EVs are *cost effective* and have a *suitable driving range / battery life*.
  - ⇨ The EV campaign has influenced viewers positively – *gave you a good feeling about EVs* and *the ad was enjoyable to watch* having the highest scores among the ad diagnostic measures.

Contacts

Information withheld under section 9(2)(a)

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Te Tari Tiaki Pūngao

GAME CHANGERS

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GAME CHANGERS Ipsos

ELECTRIC VEHICLES CENSYDIAM SEGMENTATION

Electric Vehicles Segmentation Report

Information withheld under section 9(2)(a)

GAME CHANGERS

RESEARCH OBJECTIVES

Understand people's relationship with their car to identify how EVs can be positioned to meet the motivational needs of car owners

Understand the relationship people have with their car. Current fit with EV value proposition.

What are the motivations / needs for car ownership?

What are the functional and emotional needs for choosing a car?

What are current perceptions of EVs? Benefits and barriers?

How are EVs currently meeting these functional and emotional needs?

Quantify and understand the market segments.

Define and profile each market segment.

Assess size of each segment.

Evaluate motivations and likelihood to adopt BEVs

Measure benefits and barriers.

Identify messages/ interventions to best reach each segment.

Identify key messages and communication channels for each market segment.

KEY FINDINGS FROM THE QUALITATIVE PHASE

PHASE I : Qualitative Research

2-hour in-home interviews with decision or joint decision-maker for car purchase (some knowledge of EVs required for bulk of interviews)

30 interviews in Auckland (20)/Christchurch (10), conducted in December 2016/January 2017

People with a household income level greater than $60,000 PA

	Young singles/ couples	Singles/ couples	Younger families	Older families	Empty nesters/ older couples	Retirees	TOTAL
Urban – Auckland	3	3	4	4	3	3	**20**
Urban – Christchurch	2	1	2	2	2	1	**10**
TOTAL	**5**	**4**	**6**	**6**	**5**	**4**	**30**

Car category context

- **Cars represent a lifeline to mobility**
  - Anything that places restriction on that freedom will be seen as undesirable.

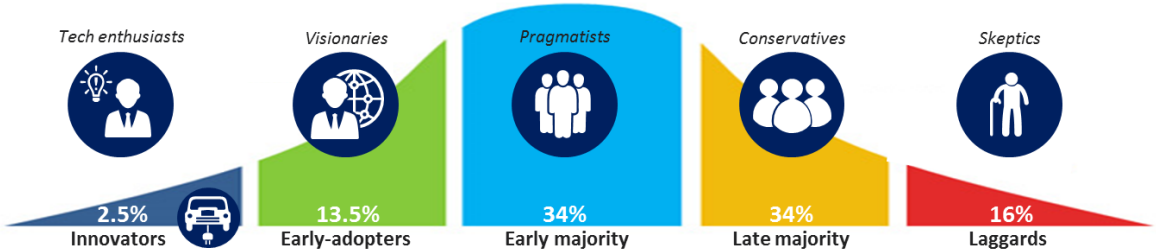
- **Car purchasing is a RISKY decision**
  - People will avoid car choices that are deemed risky.
  - Even when choosing among familiar technology, it is a highly complex process involving a lot of research to make the right choice.
  - Easy access to a trusted source of information that helps consumers in their search to compare car options will be important to remove uncertainty about new technology.

Motivational landscape for cars

- In order to be a **viable option**, a car has to **functionally deliver what people need to fit/suit one's lifestyle**
  - To become a viable option, an EV needs to **match or exceed the functional benefits** of ICE vehicles.

- In order to be an **attractive option**, a car needs to psychologically connect with **deeper underlying emotional benefits**
  - People's current perceptions of EV owners is that they are for people who are motivated by particular set of needs, skewed towards a **particular motivation** in the market.
  - They will not be encouraged to investigate, let alone buy, an EV until they feel it has **broader appeal**, that it can be **driven by someone 'like them'.**

- Effort is required to adopt new technologies and for large scale uptake **the benefits must considerably outweigh potential risks.**
  - Generally new products based on innovative technology require more learning and research effort than for existing products.

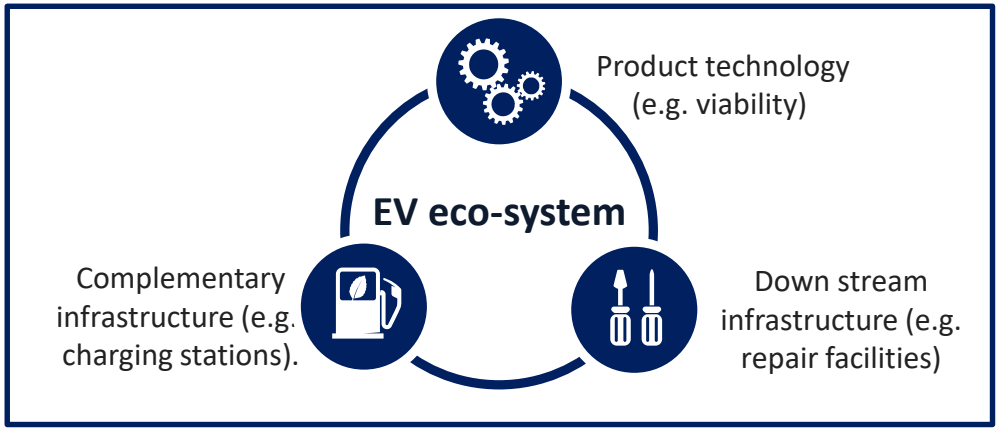


The importance of creating an EV eco-system

Alongside meeting category expectations, holistic benefits of EVs (such as good for the environment) tap into higher order esteem needs and support the positive establishment of EVs in people's mental network about cars.

HOWEVER

Consumers will be reluctant to adopt EVs until all aspects of the eco-system are in place to address their fundamental needs.



Source: Overcoming Barriers to Deployment of Plug-In Electric Vehicles (2015)

In order to move from favorability to consideration, familiarity with the EV ecosystem needs to improve

- Despite a **favorable view of EVs, they are currently not part of the consideration set when people buy a car.**
  - Cars are already perceived as a risky purchase and lack of familiarity with EVs equals a major risk.
  - Current perception of barriers far outweigh benefits.
    - Opportunity to educate people about the EV technology so that they can see tangible benefits directly applicable to their lives will be key to ensure EVs become part of the consideration set.

- Lack of a visible eco-system to support EVs reinforces the perception that EV will be an option in the future
  - Opportunity to **help visualize EVs and the EV infrastructure** as much as possible : “the future is actually here and it is no longer in a ‘trial stage’”

- **Tech enthusiasts** and **visionaries** likely to be the primary **target segments**
  - They have more **disposable income** and can **afford to make somewhat risky choices.**
  - They will **over-look a weak eco-system** in order to own an EV for **psycho-social benefits**.

CAR AND ELECTRIC VEHICLE LANDSCAPE

Sample characteristics

(n=1000)
respondents

23 minutes
average duration

47% Male

53% Female

37% 18-39 year-olds

44% 40-64 year-olds

19% 65 years and over

20% Upper NI (excl. AKL)
33% Auckland
23% Mid + Lower NI
16% Upper SI
8% Lower SI

9% NZ Maori
78% European
2% Pacific People
13% Asian
4% Others

82% A stand-alone house
9% Semi-detached house
7% An apartment
1% Other

34% HH income <$60k

26% HH income $60,001-$100k

25% HH income >$100k

15% Don't know / rather not say

61% Household no kids
37% HH with kids (under 18)
38% HH with kids (any age)
16% HH with kids (under 5)
8% Younger couple no kids
13% Single person HH
24% Older couple no kids

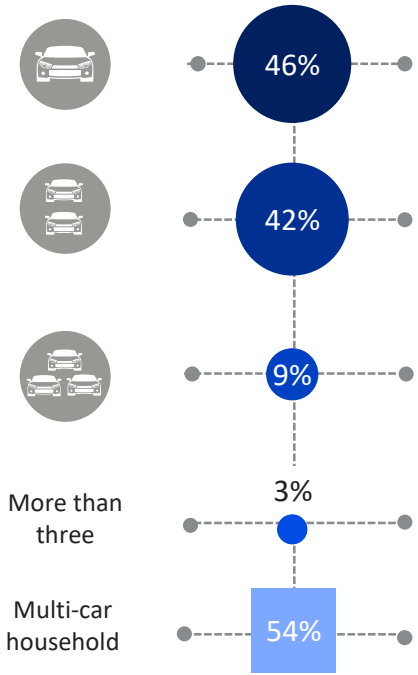
Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000); **QB:** Which of the following best describes your age group? ; **QC:** Which of the following best describes your gender? **Q123:** Which ethnic group or groups best describe you? ; **Q124:** Which one of the following best describes where you live? ; **Q121:** Which of the following best describes your **total household income** before tax? ; **Q122:** Which of the following best describes your household? ; **Q127:** Which of the following best describes your home?

Car ownership and car use characteristics

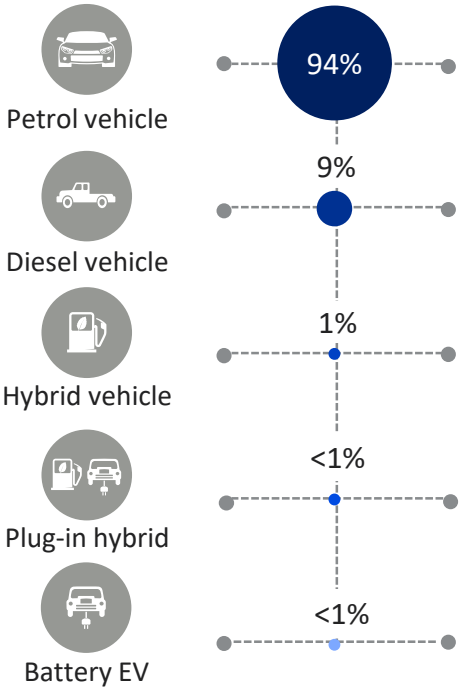
Number of vehicles owned in household

Total sample



Type of cars in household

Total sample



Note: In general people were unable to accurately estimate their KMs travelled on an average day or average weekend.

60%

At home

(n=1,000)

77%

At work

(n=514)

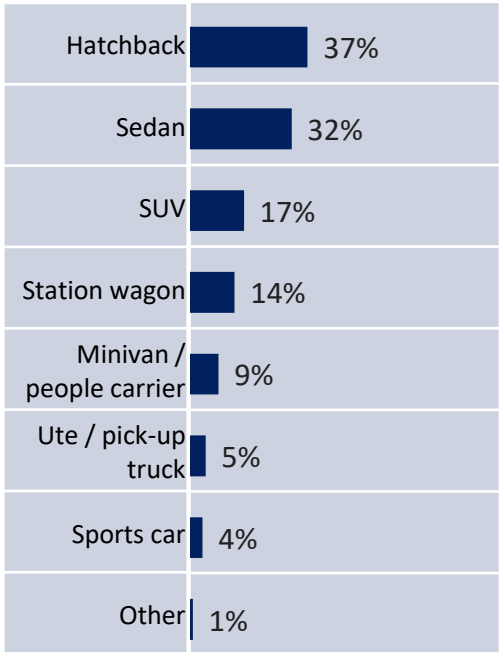
Stated access to electricity

Note: At home charging capability includes: In a garage, In a carport, In an indoor carpark, In an outdoor carpark, NETT indoors

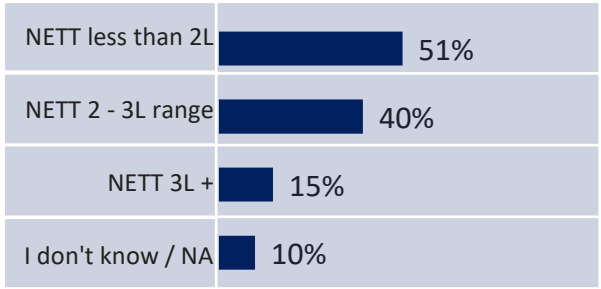
Base: Total sample (n=1000), Those who drive to work (n=514) **C1:** How many cars do you currently own (or jointly own) within your household? ; **C3:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what type of car it is? **U5a:** Where do you typically park it at home? **U5b:** Where do you typically park it whilst at work?

Car ownership characteristics

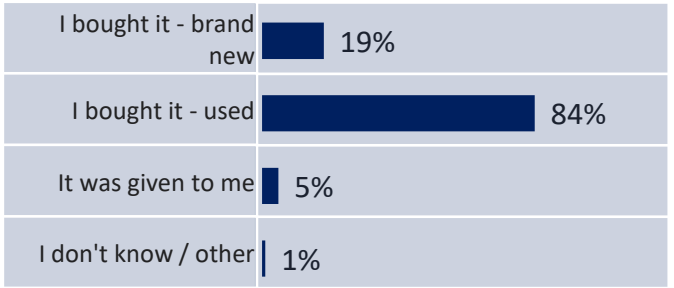
Body type of car(s)



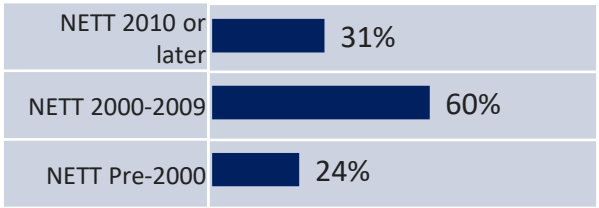
Engine size(s) (in litres)



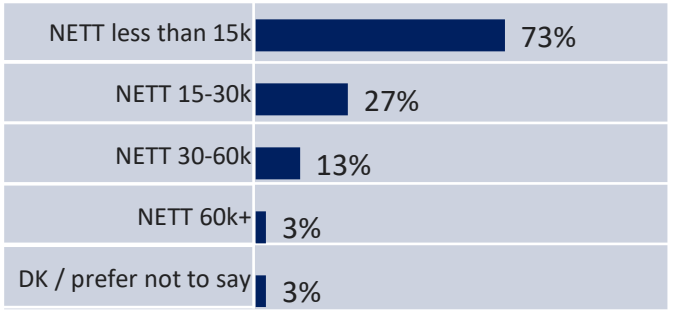
How acquired vehicle(s)



Year of manufacture(s)

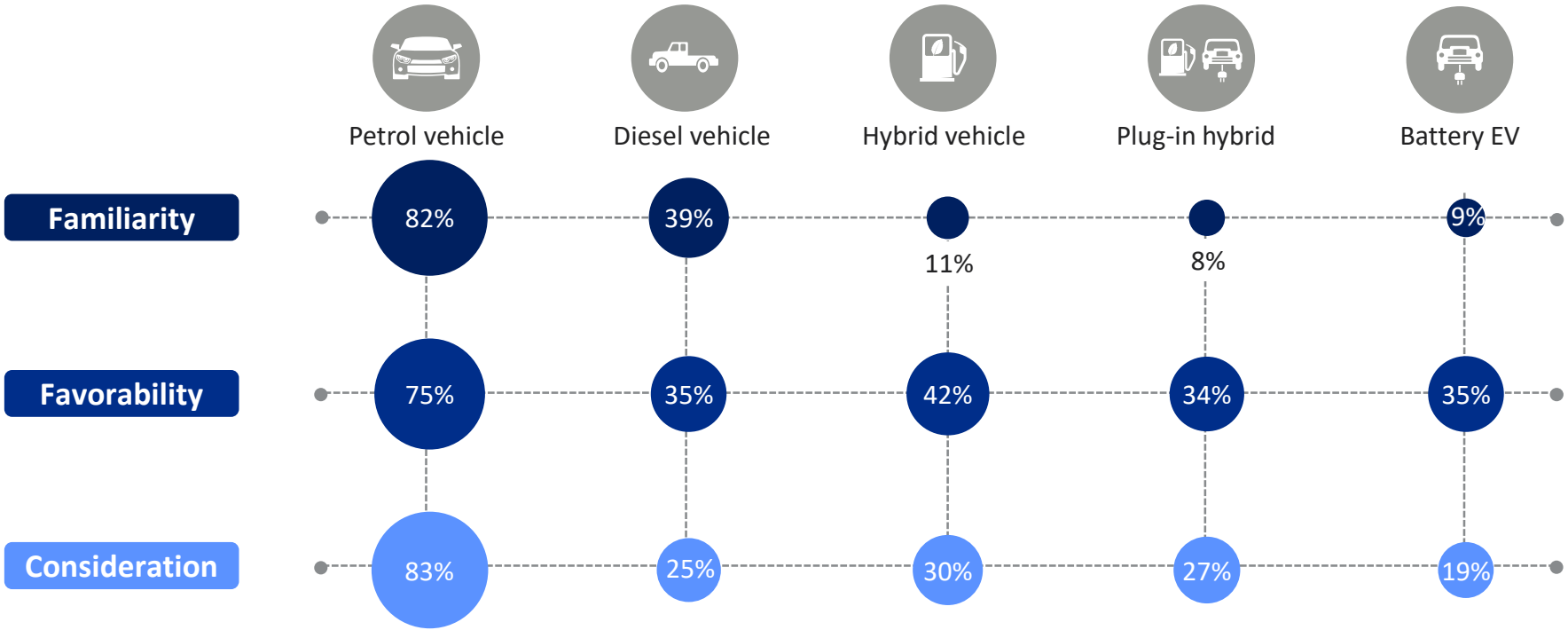


Amount paid for car(s)



Base: Total sample (n=1000),) ; **C5:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what body type it has? ; **C9:** Please tell us the car's engine size (in litres)? ; **C7:** Please tell us what year the car was manufactured? ; **C6a:** How did you take ownership of it? ; **C8:** How much did you pay for your car?

Familiarity towards electric engine types is generally weaker than *favorability* and *consideration*, which is a different pattern compared to ICE vehicles

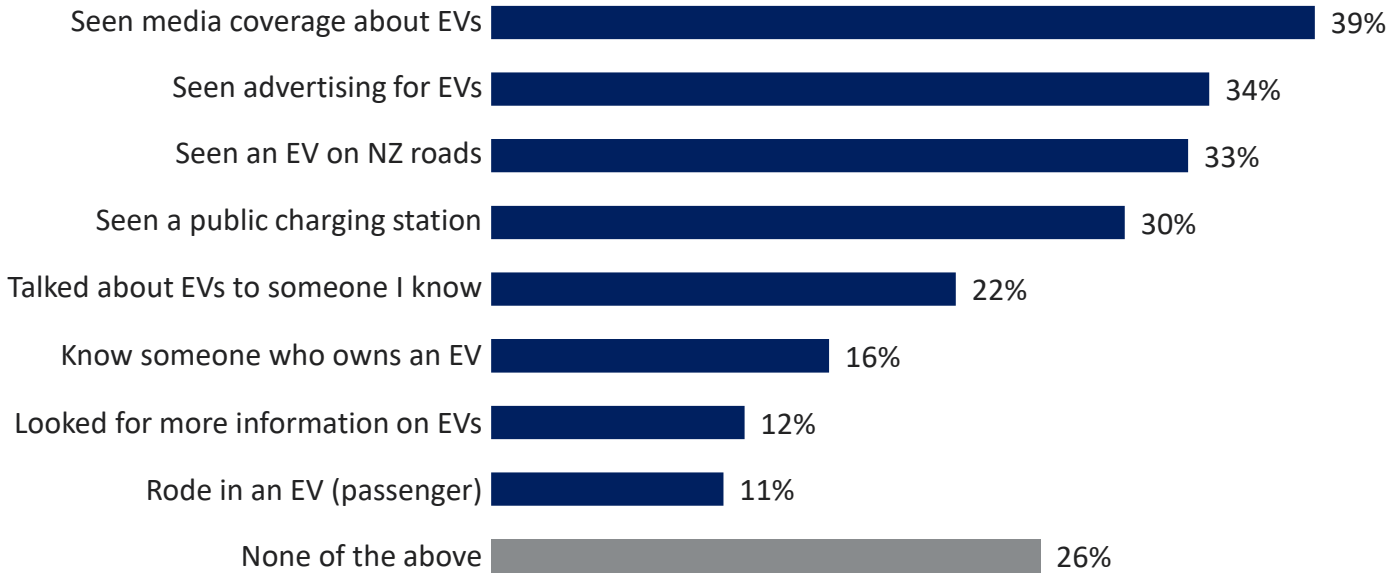


Note: Familiarity, favorability and consideration figures are top two box percentages

Base: Total sample (n=1000); **AET1:** How would you rate your familiarity with the following types of cars? ; **AET2:** How favourable or unfavourable is your overall opinion or impression of the following types of cars? **; N4:** 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?

The level of engagement with EVs is encouraging, with 1/3 of NZers claiming to have seen one on the road and just over 10% saying to have ridden in one

Actions done in the past year



Base: Total sample (n=1000); **EV8:** Which of the following things, if any, have you done in the past year?, **EV9:** Who would you trust to promote electric vehicles in New Zealand?

Perceived barriers of EVs far outweigh the benefits; notable barriers incl. *affordability*, *battery uncertainty* and *lack of knowledge*

How the benefits of Electric Vehicles currently compare with barriers

Barriers of driving EVs

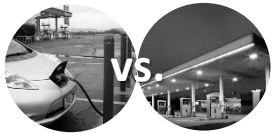
- **43%** Not affordable to purchase
- **34%** Uncertainty about battery life
- **33%** I don't know enough about them
- **33%** Charging stations aren't easy to find
- **26%** Range not suitable for long distance
- **20%** Aren't 'tried and trusted' yet

Benefits of driving EVs

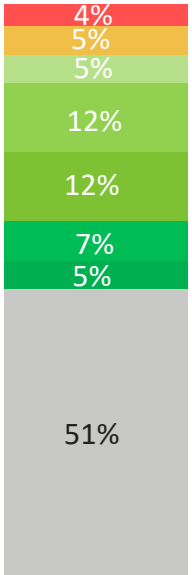
- **53%** Less pollution
- **43%** Cheaper to run
- **39%** Save fuel resources
- **35%** Use renewable energy
- **34%** Can charge at home
- **27%** Quiet when driving

Base: Total sample (n=1000), **EV10:** Below are a list of possible benefits of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest attractive features to you, **EV11:** Below is a list of possible barriers of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest issues to you. **EV11:** 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?

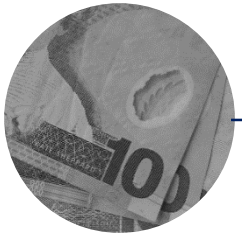
NZ'ers don't know how EV and ICE running costs compare and generally underestimate the cost savings



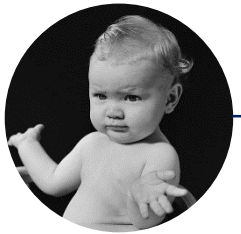
How the running costs of Electric Vehicles compare with ICE



Cost more to run
Cost about the same to run
Cheaper to run by less than 10%
Cheaper to run by 10-25%
Cheaper to run by 26-50%
Cheaper to run by 51-80%
Cheaper to run by 81% or more
I don't know



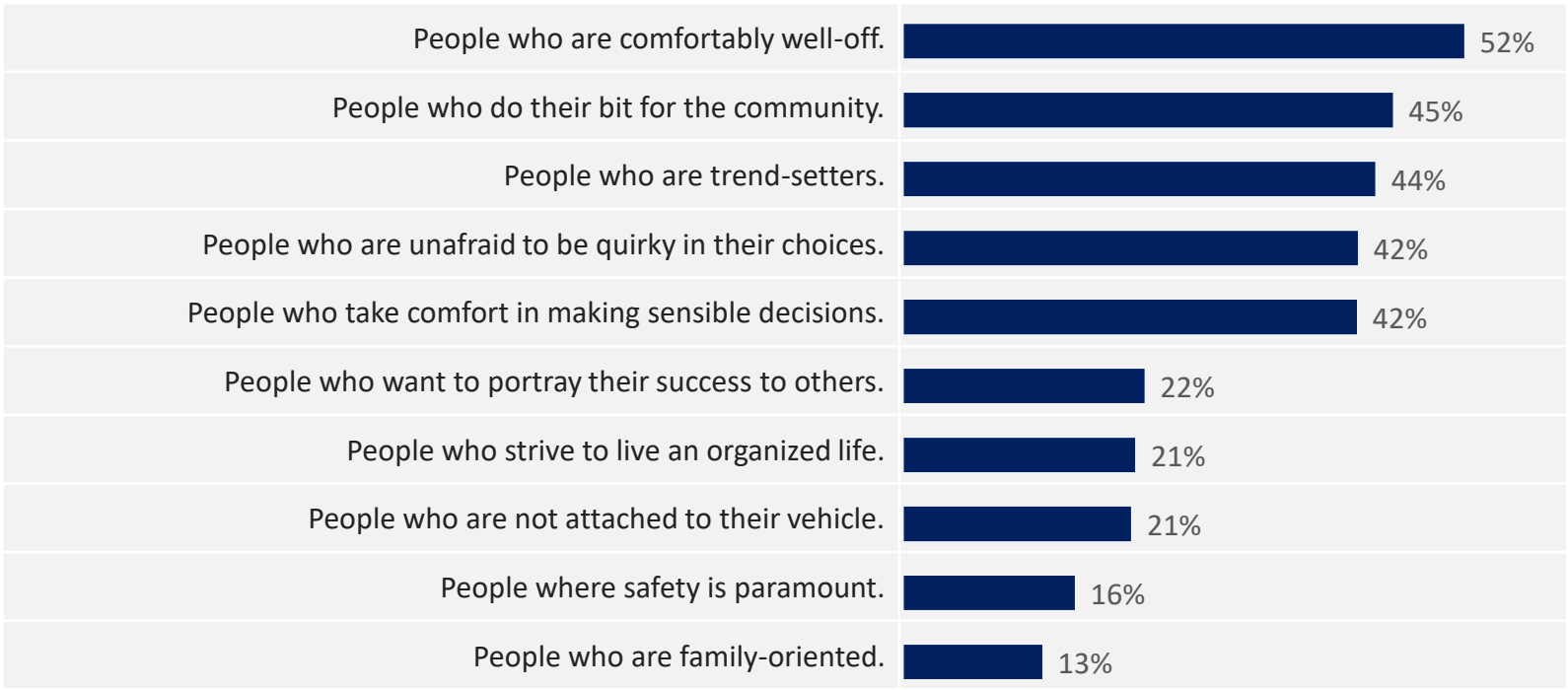
40%
Electric vehicles
cost less



51%
Don't know

Base: Total sample (n=1000); **EV15:** Thinking about the cost to run an electric vehicle compared to a similarly-sized petrol vehicle, how do you think the running costs compare?

Who do they perceive to be an EV owner?



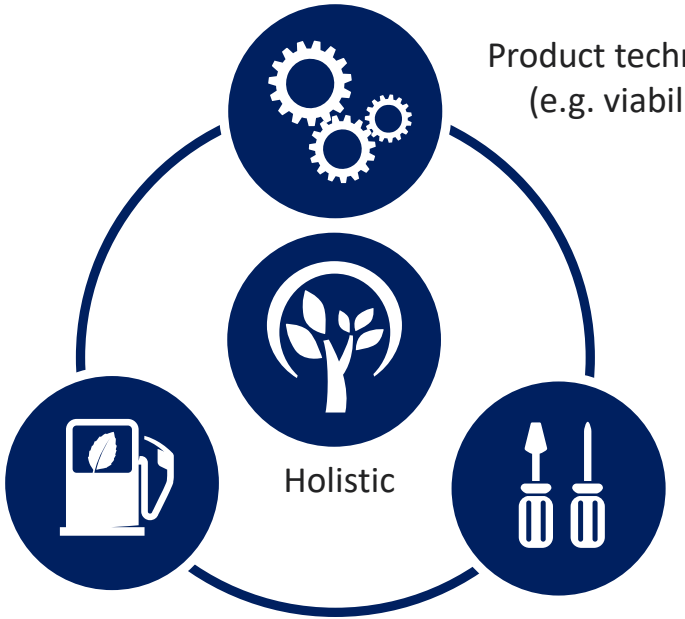
Base: Total sample (n=1000); **EV7:** Which of the following statements, best describe the type(s) of people who you think would own and drive an electric vehicle.

The Electric Vehicle eco-system of innovation

We asked a series of agree / disagree statements that cover all aspects of the eco-system

Remember…

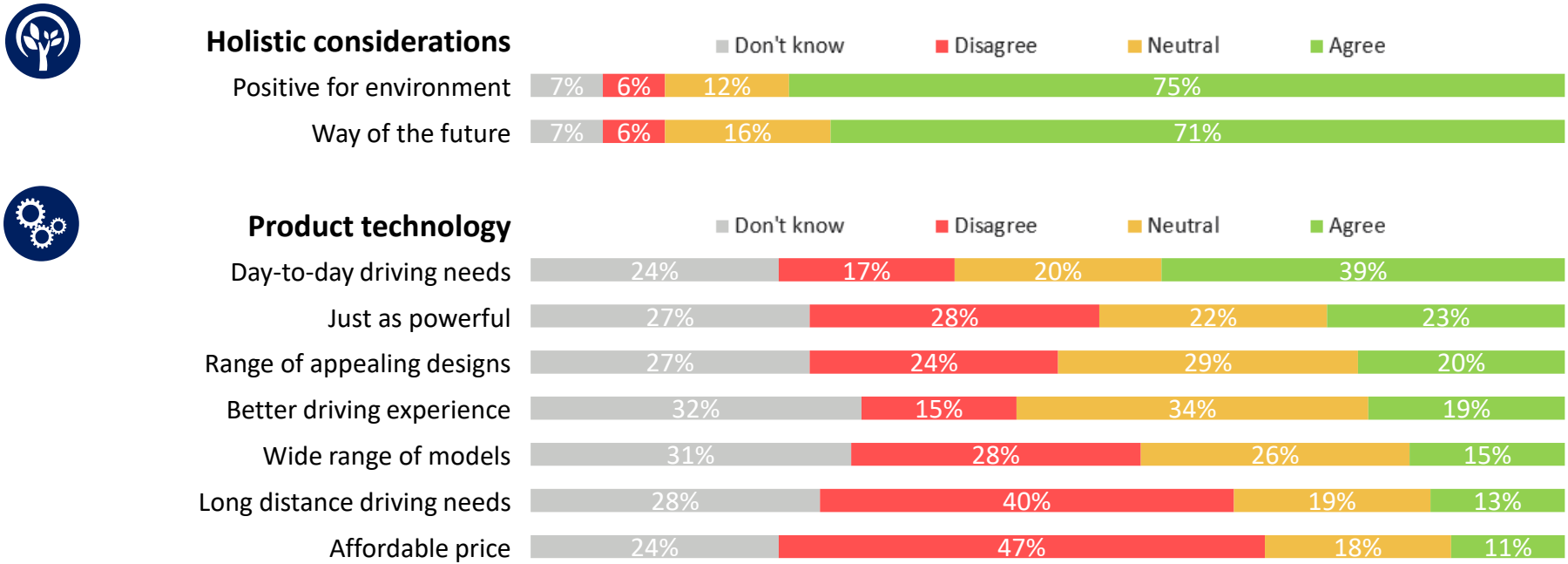
These statements for the most part are measuring how EVs meet the basic requirements of a vehicle… not how they are better!



 Source: Overcoming Barriers to Deployment of Plug-In Electric Vehicles (2015)

Holistic statements such as *positive for the environment* and *way of the future* have the strongest level of agreement

Statements about Electric Vehicles

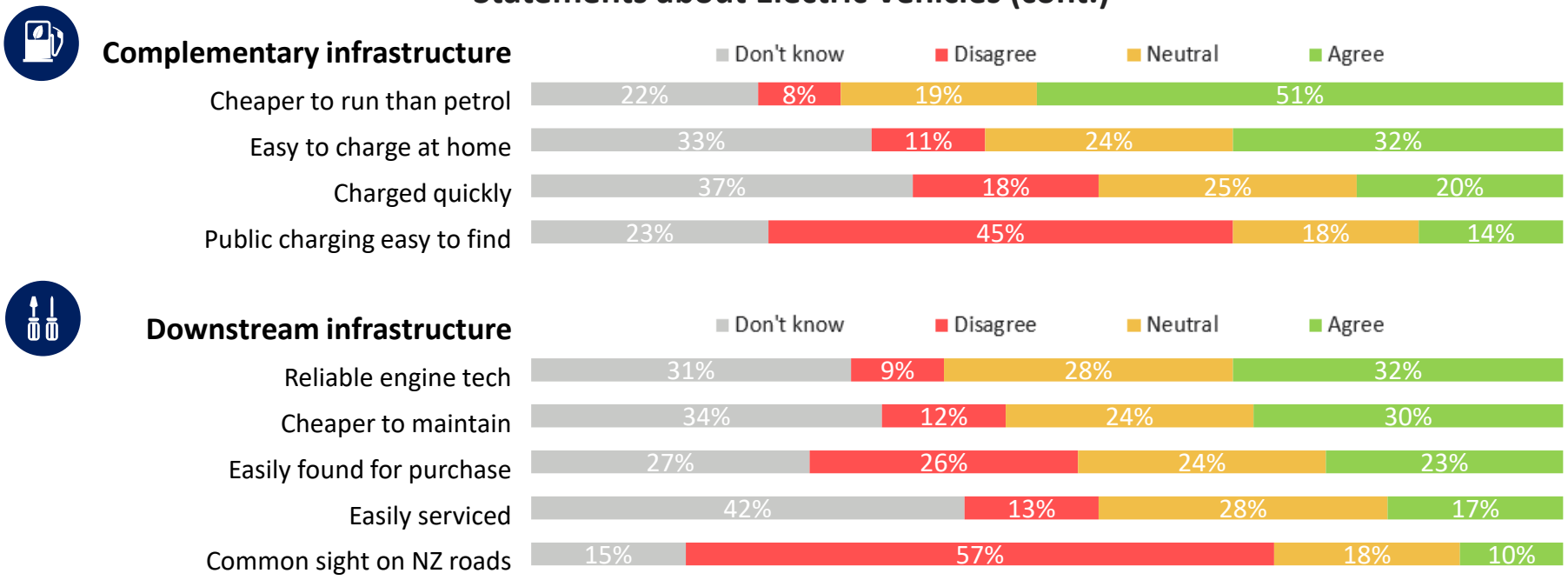


Note: Statements ranked in order of 'agree'

Base: Total sample (n=1000); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement,

Consumers are less convinced about the complementary and downstream infrastructure needed to support electric vehicles

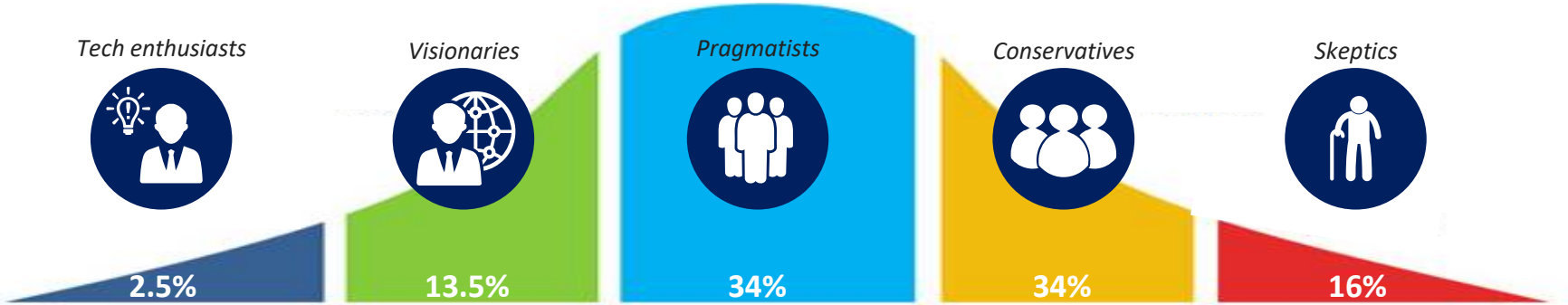
Statements about Electric Vehicles (cont.)



Note: Statements ranked in order of 'agree'

Base: Total sample (n=1000); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement,

Traditional consumer-adoption models can predict the diffusion of new innovations through society



3.6%	11.2%	45.5%	25.2%	14.5%
10 – meets your needs completely	8-9	5-7	2-4	1 – Does not meet your needs at all

More or **less** likely to be… Green = significantly ↑ , Red = significantly ↓ than total sample

Live in Auckland city (**45%** vs. 29%) HH income > $60K (**44%** vs. 26%) Directionally more likely to be Asian (**22%** vs. 13%)	Live in Auckland city (**40%** vs. 29%) Asian descent (**22%** vs. 13%) Live in a city (**65%** vs. 55%)	*No significant differences*	*No significant differences*	Live outside of Auckland (**76%** vs. 67%) HH income <$60K (**44%** vs. 34%) Live in a town or rural area (**56%** vs. 45%) Less likely to be Asian (**6%** vs. 13%)

Base: Total sample (n=1000); **AET5:** Taking everything into account, please could you tell us what your general attitude to, or impression is, of each of these types of cars. Even if you've never used them, you can have an expectation of how they would meet your needs.

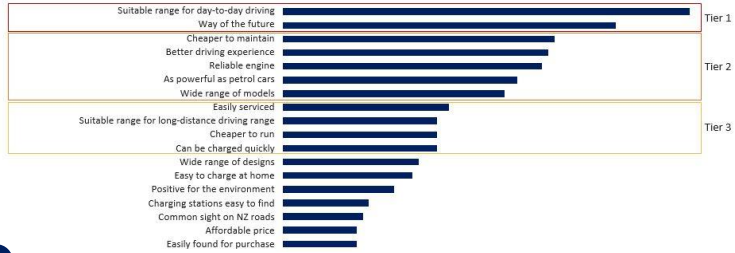
We use the Ipsos Bayes Net (IBN) Driver Analysis

IBN looks at the relationship between the desired outcome (EV can meet my needs) and belief statements about Electric Vehicles. The IBN helps us understand…

> The relative strength of different statements; the relationship between statements; and the direction of these relationships.

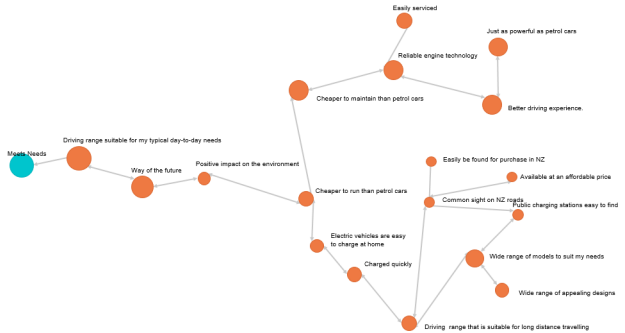
This allows targeting of key drivers of 'meeting my needs' to influence Electric Vehicle uptake

Drivers of 'EV meeting my needs'



WHAT TO FOCUS ON

Identifies which beliefs to focus on to grow a acceptance of EVs.



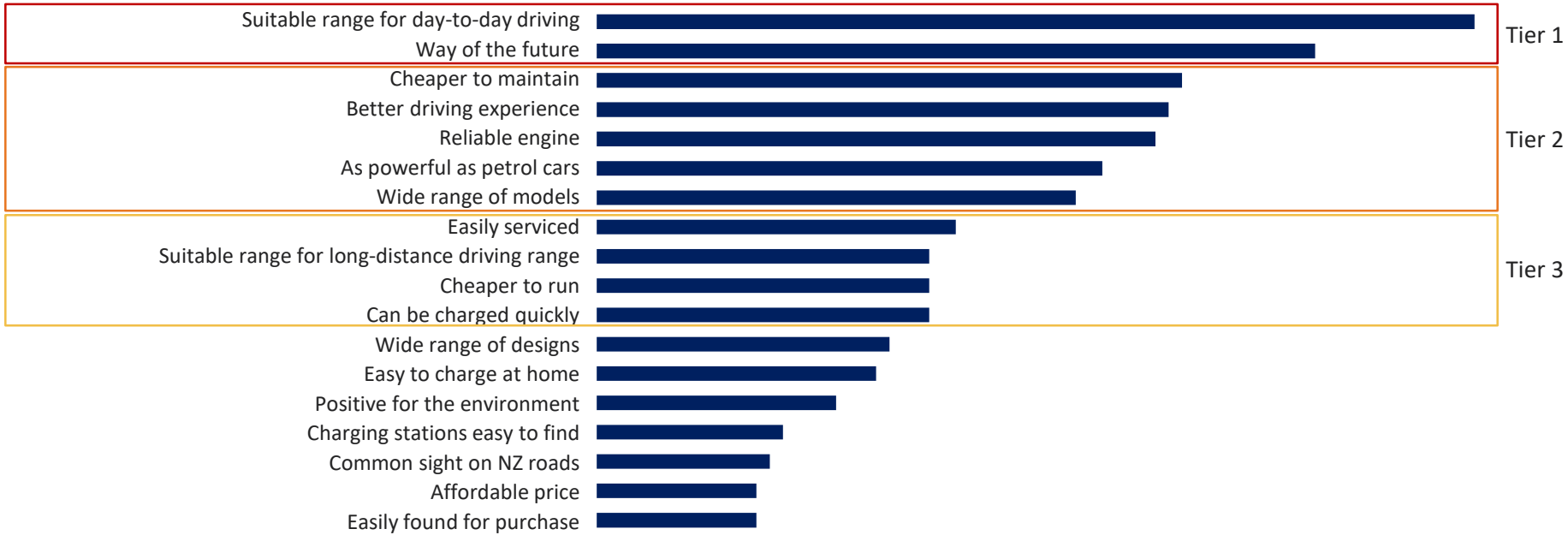
AND **HOW** TO FOCUS ON THEM

Understands how people associate and connect the statements together, which assists with developing action plans.

Base: Total sample (n=1000); **AET5:** Taking everything into account, please could you tell us what your general attitude to, or impression is, of each of these types of cars. Even if you've never used them, you can have an expectation of how they would meet your needs.

To improve their uptake, key area of focus is to improve perceptions they have a *suitable range for day to day driving* and maintain they are the *way of the future*

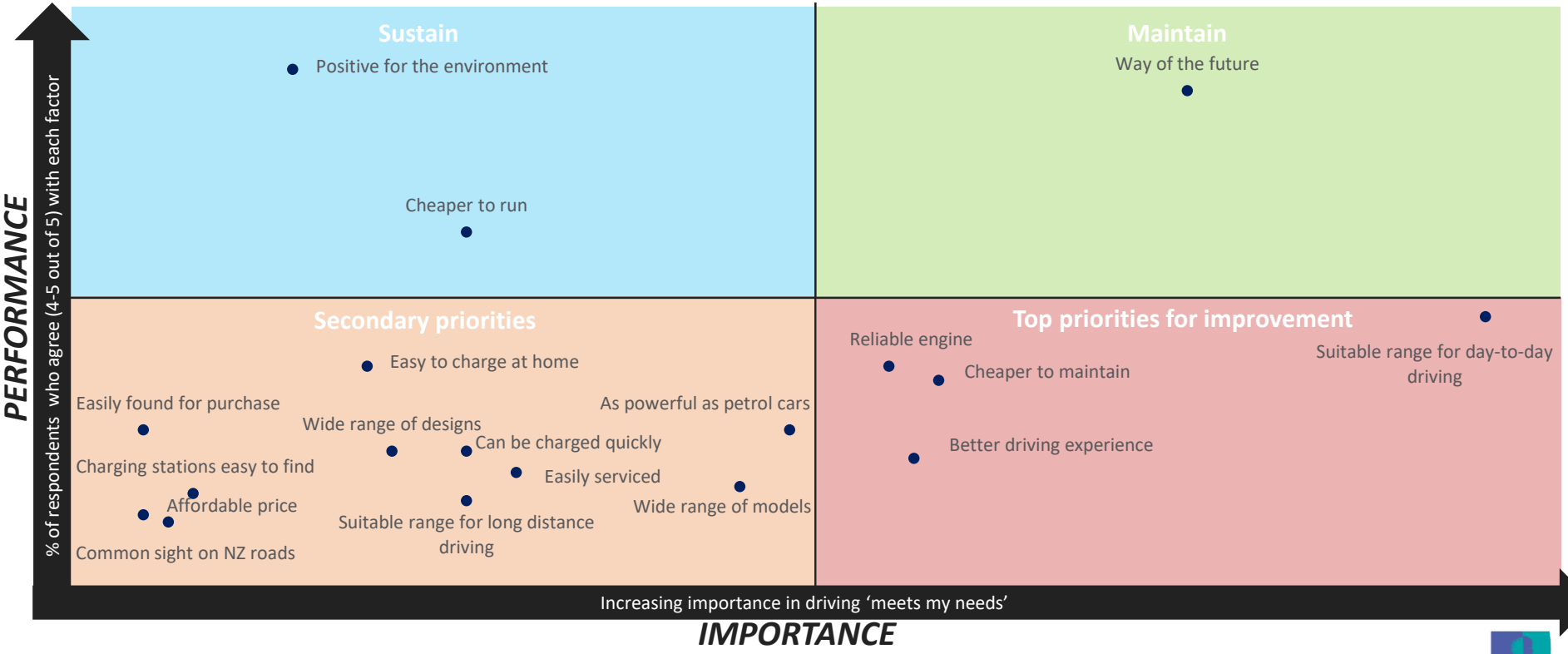
We looked at how various statements about Electric Vehicles are related to 'meeting my needs', and how they relate to all the other statements. This gives us the rank and strength.



Base: Total sample (n=1000); **AET5:** Taking everything into account, please could you tell us what your general attitude to, or impression is, of each of these types of cars. Even if you've never used them, you can have an expectation of how they would meet your needs. **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles?

WHAT PERCEPTIONS SHOULD WE FOCUS ON IMPROVING?

Features such *suitable range for day-to-day driving*, *cheaper to maintain*, *reliable engine* and *better driving experience* are top priorities to improve perceptions



Base: Total sample (n=1000) ; **AET5:** Taking everything into account, please could you tell us what your general attitude to, or impression is, of each of these types of cars. Even if you've never used them, you can have an expectation of how they would meet your needs. **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles?

Ipsos Bayes Net (IBN) Driver Analysis

Recap: Across all the different statements, we looked at how the various statements are related to in 'meeting my needs', and how they relate to all the other qualities. This gives us the linkages.

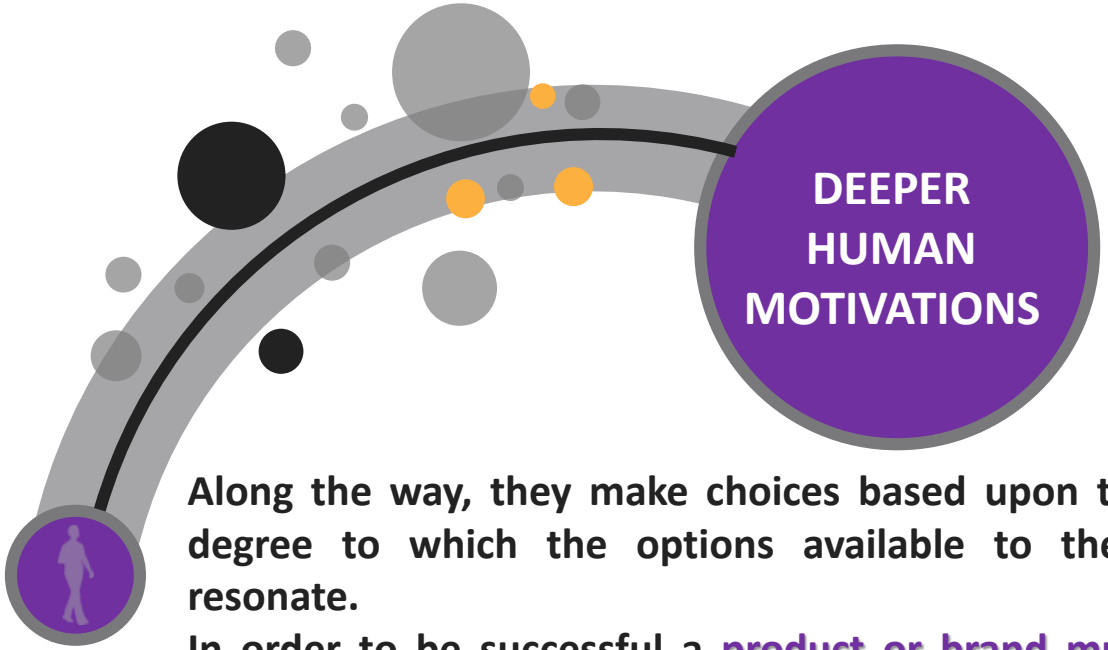
Drivers of influence – relationships and directions

Base: Total sample (n=1000); **AET5:** Taking everything into account, please could you tell us what your general attitude to, or impression is, of each of these types of cars. Even if you've never used them, you can have an expectation of how they would meet your needs. **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles?

INTRODUCING CENSYDIAM

People are on a **personal journey**
to **satisfy deeper human motivations**

THE CENSYDIAM APPROACH



Along the way, they make choices based upon the degree to which the options available to them resonate.

In order to be successful a product or brand must resonate with people's deeper human motivations.

North/South – the 'me' dimension: RELEASE or CONTROL

Top of model / North

The desire to let go, be impulsive, be high spirited

Bottom of model / South

The strive for control, be rational and suppress your feelings

West/East – the 'social' dimension: STAND OUT or FIT IN

Left / West

The desire to assert oneself, stand out and dominate

Right / East

The desire for companionship, bonding and fit with others

West is more about *ME*

East is more about *WE*

GAME CHANGERS

These two dimensions lead to eight core motivations

Power is about the need to be the best. It relates to the desire I have to be respected, praised and acknowledged for the choices I make and for the successes I have achieved in my life. The Power dimension reflects my social status and the need to be an authority and a leader of others.

Belonging is all about being surrounded by people who accept me as I am, as an equal and who make me feel welcome. Belonging is about the need to be part of society or a group we really feel part of. Part of this is linked to following norms and traditions just because we are part of that culture or group. It is about togetherness, brotherhood, camaraderie, taking care of others, being taken care of by others, and doing good and feeling good.

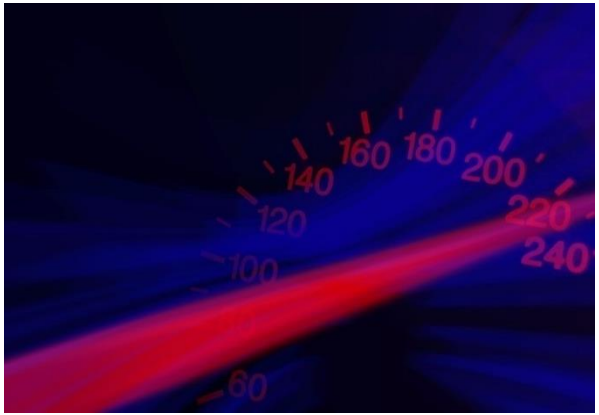
Enjoyment is all about maximising the pleasure I get out of life and enjoying myself without worrying about the consequences. I can go a little crazy, overindulge myself and lose all inhibitions. I am spontaneous, follow my instincts and live for the moment. The purpose of consumption is abundance and enjoyment. It is impulsive and sometimes excessive or even manic.

Control is about keeping myself in check and hiding my emotions and feelings. It is not that I don't have emotions, I just don't want to let them out or let them be seen by others. There are times when I want to try to be as cool, calm and collected as possible. There are also moments when I like to be completely in control, to keep things in order, have discipline and stick to a routine which feels quite comfortable and safe. This gives me a sense of stability and structure.

Conviviality is all about wanting to be connected with other people. For me, meeting people is a joy. I love having good times with good friends and loved ones. Interacting and sharing experiences means letting go of any differences we might have. It is about opening up emotionally, being romantic or allowing others to be part of your life – on or offline.

Recognition is about feeling unique, special and ahead of the pack. The Recognition dimension reflects the need to stand out from the crowd and break from convention. Recognition is all about being proud of one's own special ability and competence, intellectually, culturally and materially.

Vitality is about adventure, testing your boundaries and discovering new things. It taps into the need we have to step outside our comfort zone, to explore our environment and to achieve independence (away from others). It is when we travel and experience the exotic and the unusual to be stimulated and excited. Vitality is all about experiencing freedom, passion, and adventure, buzzing about, spending energy, and feeling very much alive and kicking.



Security is about the experience of relaxation, tranquillity and safety. These are the moments one feels the need to retreat and recharge. One is looking for an experience that soothes, comforts and takes away the stresses and strains of hectic daily life. These are the times one withdraws to a physical or mental space that is free from worry and responsibility – an almost childlike state of feeling safe and cared for.

UNDERSTANDING CAR OWNERSHIP NEEDS IN THE MARKET

A car is a necessity and an expression of who I am

Cars are an expression of my lifestyle

A car needs to suit/fit my personal lifestyle. It is a means to an end.

A car is also an expression of who I am and where I'm at in life.

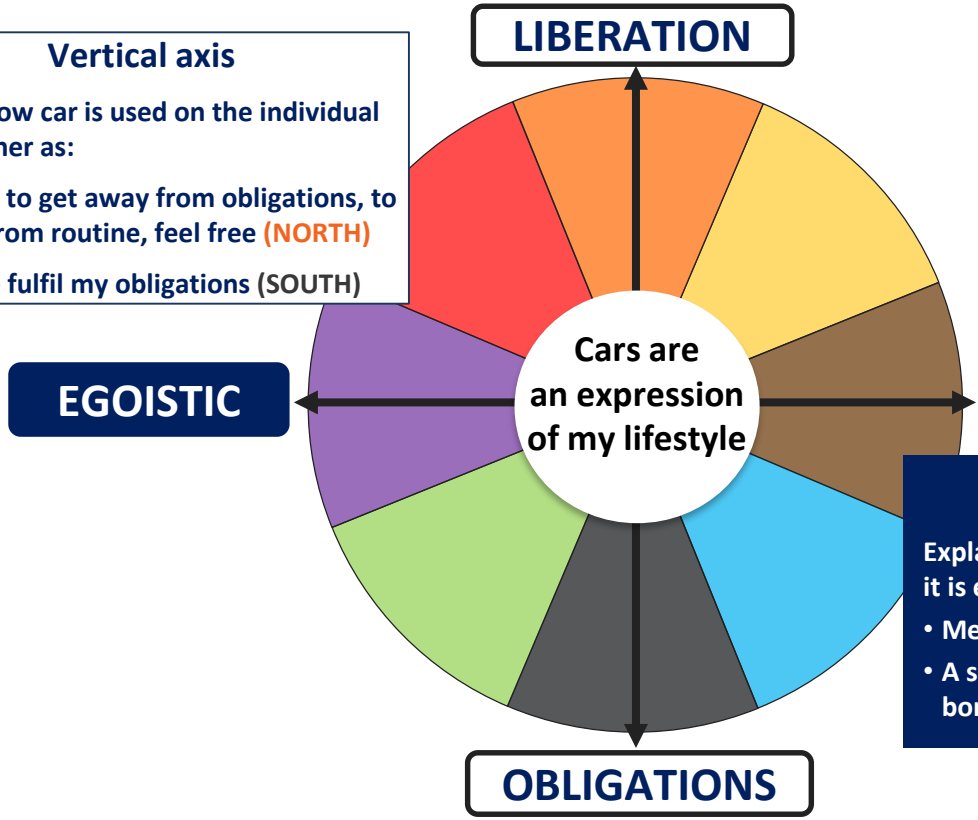
A car evolves with my stage in life and adapts to my current lifestyle needs.

Defining the dimensions for cars

Vertical axis

Explains how car is used on the individual level – either as:

- A means to get away from obligations, to escape from routine, feel free (NORTH)
- A tool to fulfil my obligations (SOUTH)



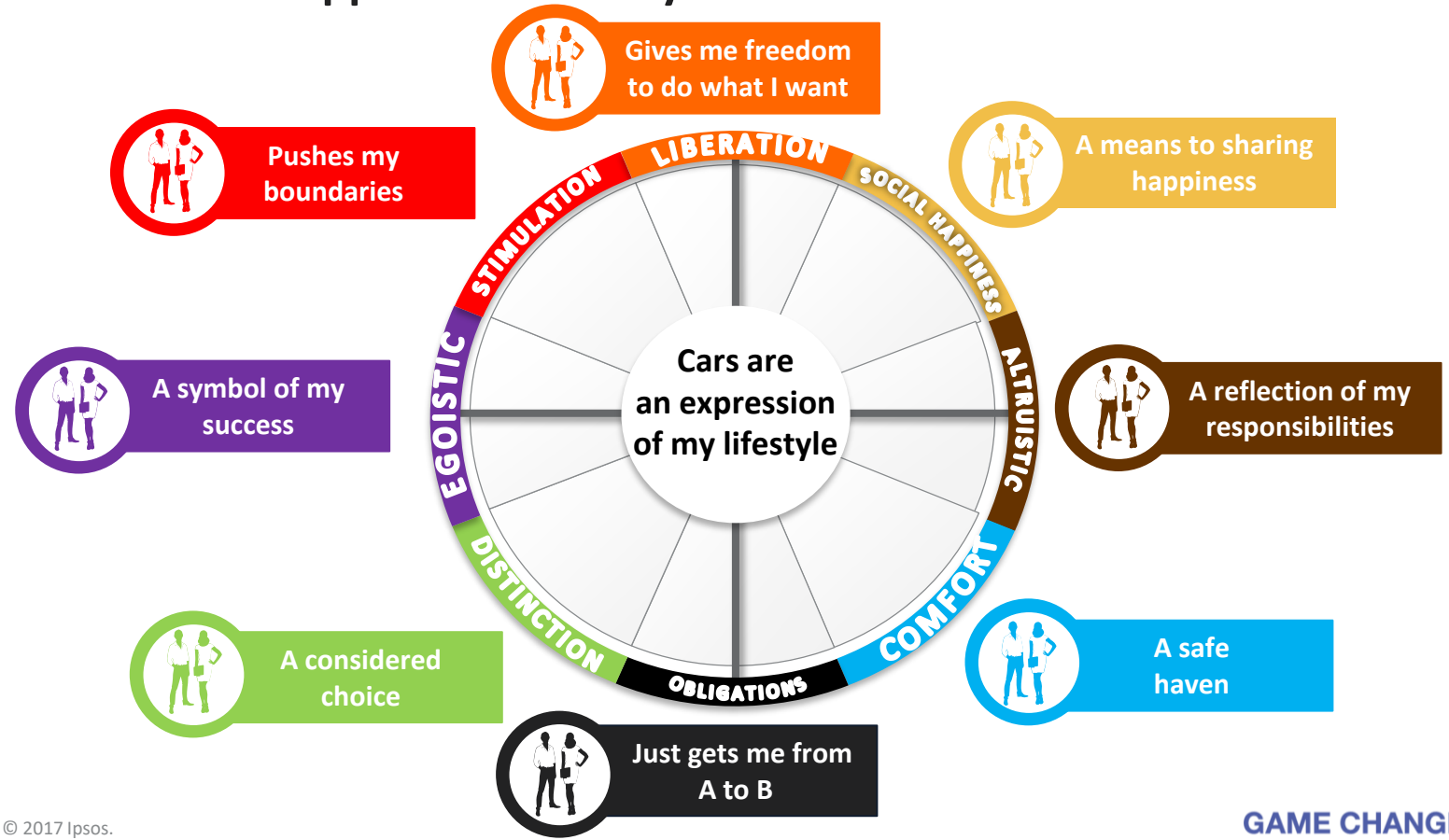
Horizontal axis

Explains what cars mean in the social context – it is either about:

- Me and the image I want to project (WEST)
- A sense of responsibilities associated with bonding with others (EAST)

DEFINING THE MOTIVATIONAL LANDSCAPE FOR CARS

8 motivations to support ones lifestyle



Using these motivations we further profile according to three different layers within each motivation in order to develop the segmentation

Understanding car ownership needs in the market

Makes me feel happy.
Allows me to have fun while driving.
Gives me moments of liberation from daily obligations
Helps me share happy times with others.
Gives me a way to bring people together.
Helps me feel connected with friends and loved-ones.
Helps me blend in with my community.
Makes me feel like a responsible member of society.
Helps me take care of my family.
Makes me feel protected.
Allows me to have some quiet Me-time.
Makes me feel taken care of.
Helps me practically do what I need to do.
Simply allows me to get from A to B.
Makes me feel like I made a pragmatic choice about how I spend my money.
Helps me feel a little bit different.
Makes me feel sophisticated.
Supports my authenticity.
Helps me to demonstrate my succes
Allows me to own the road.
Makes me feel respected by others.
Supports me on my outdoor advent
Makes me feel exhilarated.
Helps me push my boundaries.

People who embrace spontaneity in their lives.
People who are always fun to be around.
People who dedicate time for friends.
People who value the strong bonds of family/friends.
People who are family-oriented.
People who do their bit for the community.
People where safety is paramount.
People who take comfort in making sensible decisions.
People who are not attached to their vehicle.
People who strive to live an organized life.
hoices.
hers.

FUNCTIONALITIES WANTED IN A CAR

Cargo capacity
Passenger seating (# of seats)
Powerful engine
Economical engine
Sporty design
Elegant design
Roomy/spacious interior
Leather seats
Technology that enhances convenience (e.g. key less start, finger lock, park assist)
Technology that enhances drivability (engine performance, torque, cruise control)
Technology that enhances comfort (e.g. air conditioning, heated seat, Bluetooth, sun-roof)
Technology that enhances safety (e.g. air bags, rear-view camera, sensor departure lane)

Technology that minimizes impact on environment (eco-setting, low fuel emissions)
Technology that improves cost efficiency (fuel efficiency, mileage estimator)
Service/manufacturer warranty
Availability of spare parts and repair specialist
Towing bar / Roof racks
Luxury features
European brand
Wide network for servicing
Stylish interior
Kid friendly interior
Futuristic design
Bright colour exterior
Muted colour exterior

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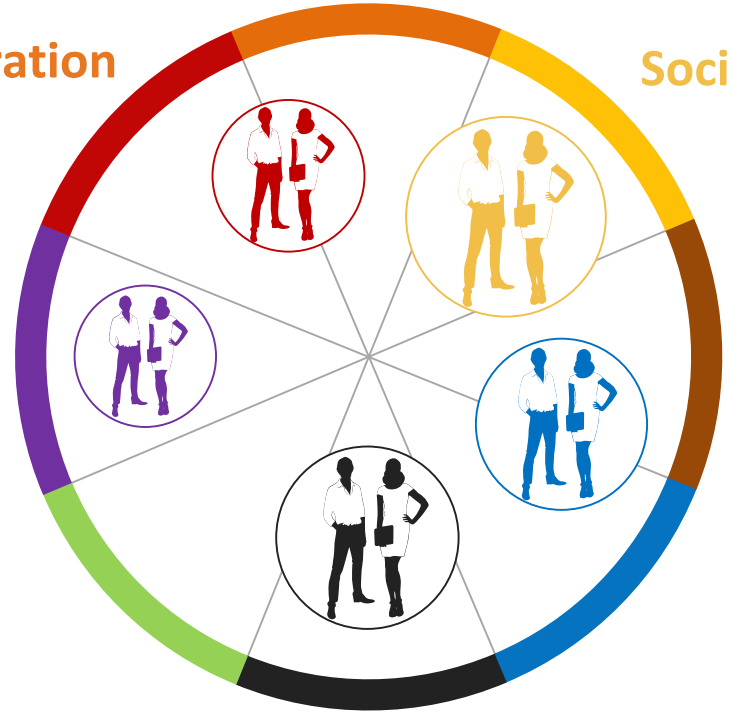
Five segments which make up the market for vehicles in New Zealand

Stimulation / Liberation
16%

Social Happiness
26%



Egoistic
14%

Altruistic / Comfort
21%

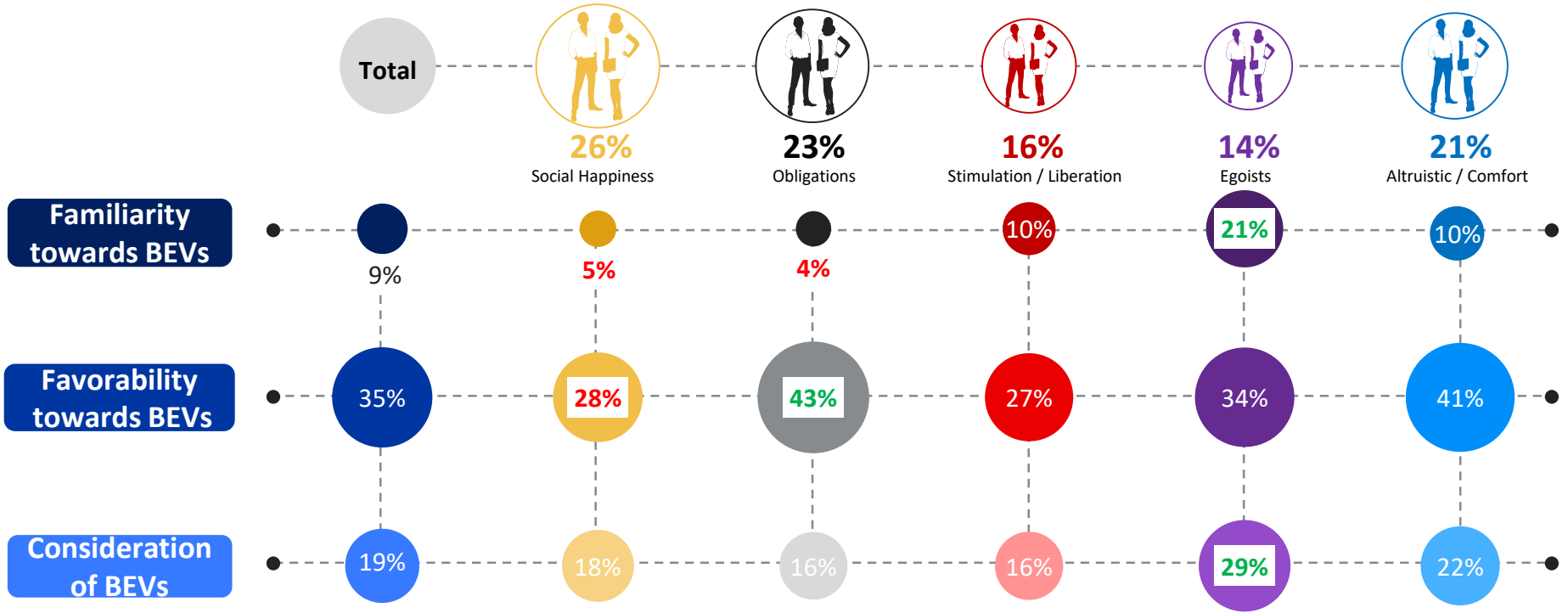
Obligations
23%

SEGMENT PRIORTISATION

We need to decide which segments to target

- We can’t target all segments!
- We need to prioritise which to target, based on factors such as…
  - Most open to purchasing EVs
  - More able to afford an EV
  - Practicality for marcomms
  - Etc…

Which segment(s) to prioritise?

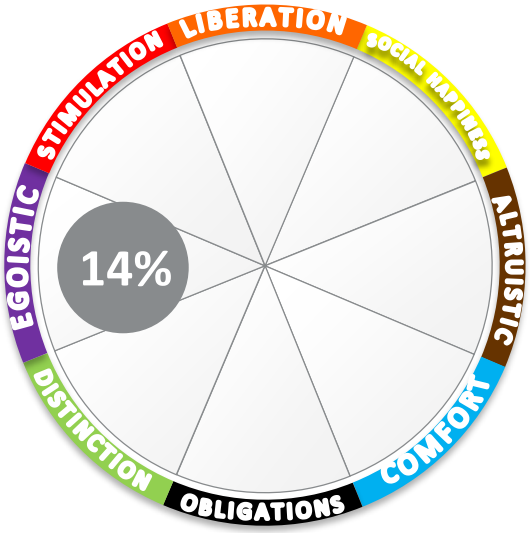


Green = significantly ↑ , Red = significantly ↓ than total sample

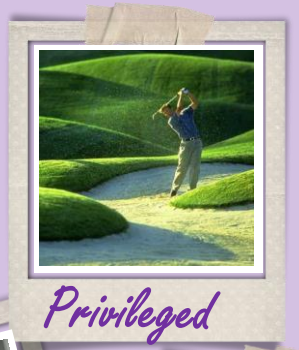
Note: Familiarity, favorability and consideration figures are top two box percentages

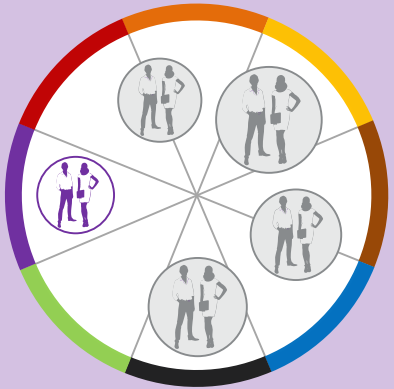
Base: Total sample (n=1000), Social happiness (n=263), Obligations (n=231), Stimulation / Liberation (n=159), Egoistic (n=138), Altruistic / Comfort (n=209) ; **AET1:** How would you rate your familiarity with the following types of cars? ; **AET2:** How favourable or unfavourable is your overall opinion or impression of the following types of cars? **; N4:** 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?

EGOISTIC SEGMENT

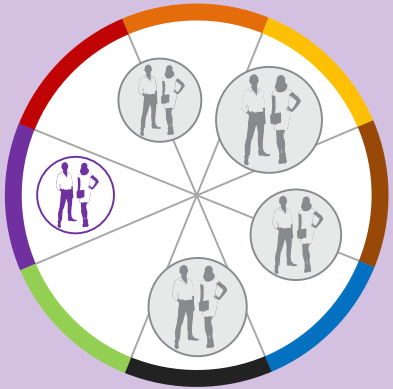


EGOISTS





EGOISTS



A symbol of my success

People who tend to measure success based on their professional achievement. They want to show the world they have worked hard and achieved something in their life. They thrive when they feel in command and above the crowd. Cars give them the means to feel empowered on the road and respected by others at the same time.

Key motivations defining the EGOIST segment

Emotional Benefits
(How it should make me feel)

- Allows me to have fun while driving.
- Helps me to demonstrate my success in life.
- Makes me feel respected by others.

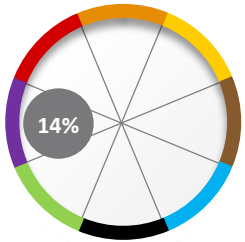
Social Identity
(What it should reflect upon me)

- People who are comfortably well-off.
- People who are trend-setters.
- People who want to portray their success to others.

Functional Characteristics
(How it should help me)

- Powerful engine
- Luxury features
- Stylish interior

Egoists are comparatively younger, live in Auckland, have a HH income >$100,000 and live in an apartment



14%	20%	Upper NI (excl. AKL)
60%	33%	Auckland
11%	23%	Lower NI
11%	16%	Upper SI
5%	8%	Lower SI

53%	47%	Male
47%	*53%*	Female

8%	9%	NZ Maori
54%	78%	European
2%	2%	Pacific People
35%	13%	Asian
6%	4%	Others

63%	37%	18-39 year-olds
32%	44%	40-64 year-olds
5%	19%	65 years and over

74%	82%	A stand-alone house
11%	9%	Semi-detached house
14%	7%	An apartment
1%	1%	Other

22%	*20%*	*40%*	*18%*	
34%	26%	25%	15%	
HH income <$60k	HH income $60,001k-$100k	HH income >$100k	Don't know / rather not say	

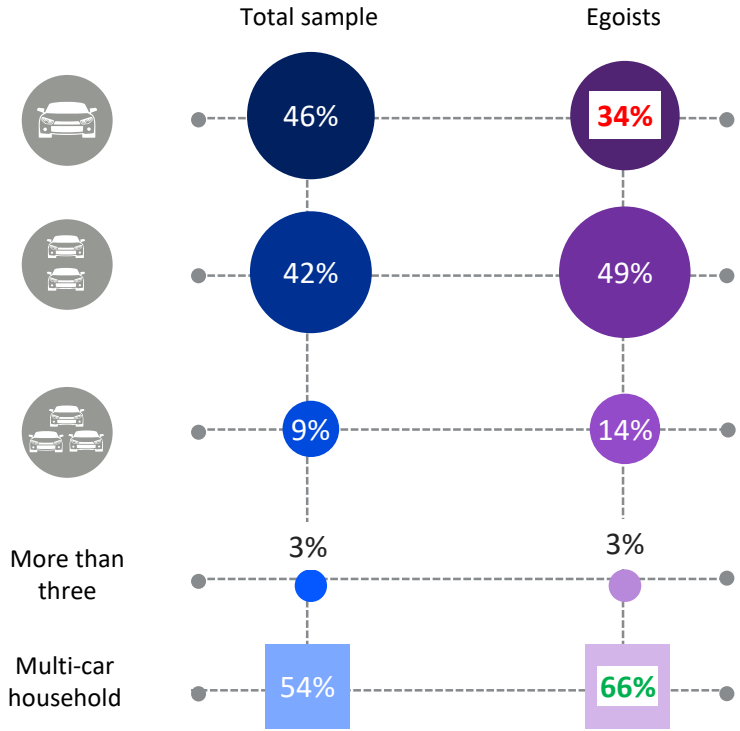
54%	61%	Household no kids
46%	37%	HH with kids (under 18)
46%	38%	HH with kids (any age)
23%	16%	HH with kids (under 5)
15%	8%	Younger couple no kids
8%	13%	Single person HH
12%	24%	Older couple no kids

Green = significantly ↑, Red = significantly ↓ than total sample

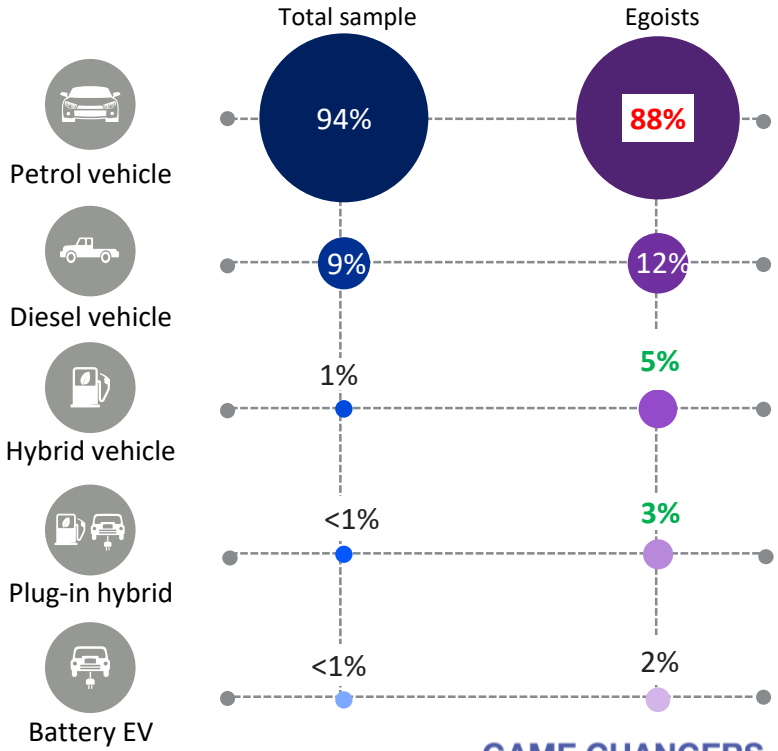
Base: Total sample (n=1000), Egoists (n=138) ; **QB:** Which of the following best describes your age group? ; **QC:** Which of the following best describes your gender? **Q123:** Which ethnic group or groups best describe you? ; **Q124:** Which one of the following best describes where you live? ; **Q121:** Which of the following best describes your **total household income** before tax? ; **Q122:** Which of the following best describes your household? ; **Q127:** Which of the following best describes your home?

Egoists tend to own multiple cars; while most have petrol cars, egoists are less likely to own a petrol vehicle

Number of vehicles owned in household



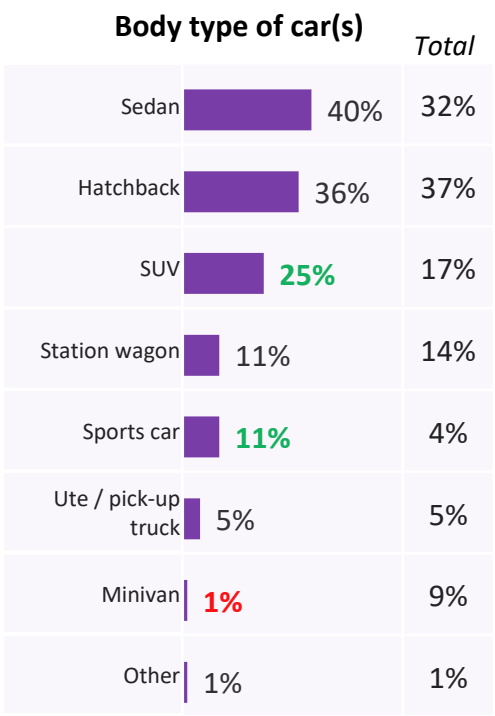
Type of cars in household

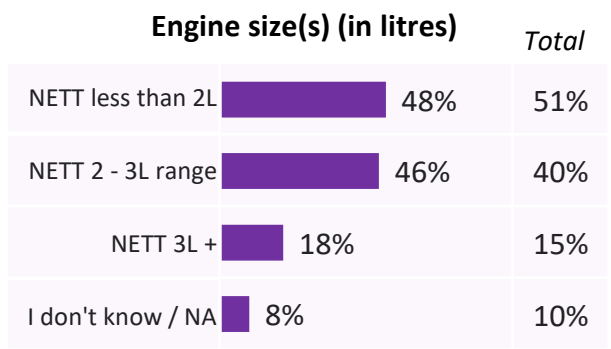


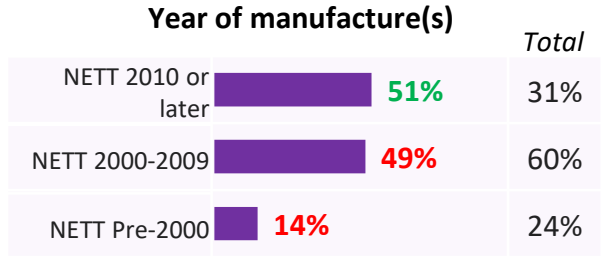
Green = significantly ↑, Red = significantly ↓ than total sample

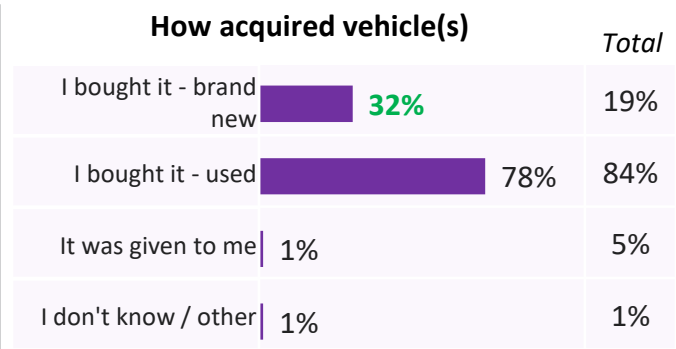
Base: Total sample (n=1000), Egoists (n=138) ; **C1:** How many cars do you currently own (or jointly own) within your household? ; **C3:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what type of car it is?

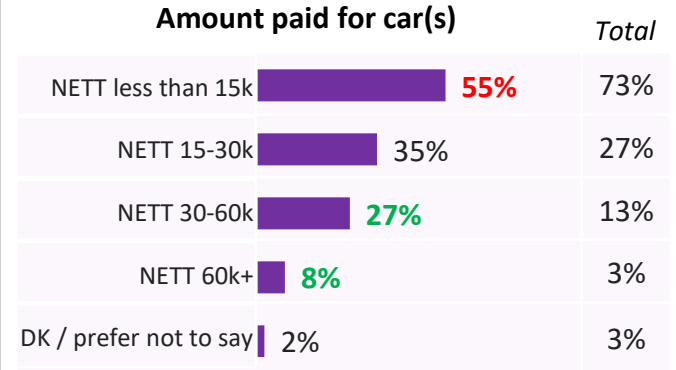
Egoists tend to spend more on vehicles, have newer cars and are more likely to purchase brand new vehicles











Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Egoists (n=138) ; **C5:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what body type it has? ; **C9:** Please tell us the car's engine size (in litres)? ; **C7:** Please tell us what year the car was manufactured? ; **C6a:** How did you take ownership of it? ; **C8:** How much did you pay for your car?

Egoists are more likely to use their primary car for work, while secondary cars are more likely to be used for leisure activities

Main differences in usage
(the car you use most often)

Running errands
61%
(77%)

Leisure activities
51%
(63%)

Work
26%
(18%)

Carpooling
14%
(9%)

Main differences in usage
(secondary cars)

Leisure activities
62%
(43%)

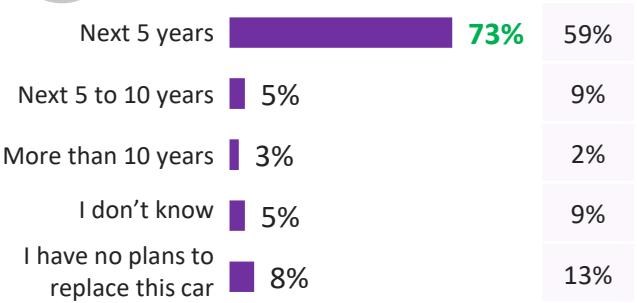
Green = significantly ↑ , Red = significantly ↓ than total sample

Base: Total sample (n=1000), Egoists (n=138); Egoists with secondary cars (n=47), Total sample with secondary cars (n=252) ; **U1:** Please tell us what you use your car for?

Egoists are more likely to say they will replace their cars within the next 5 years; spend more than $30k; *regular update* & *newer technology* are common triggers

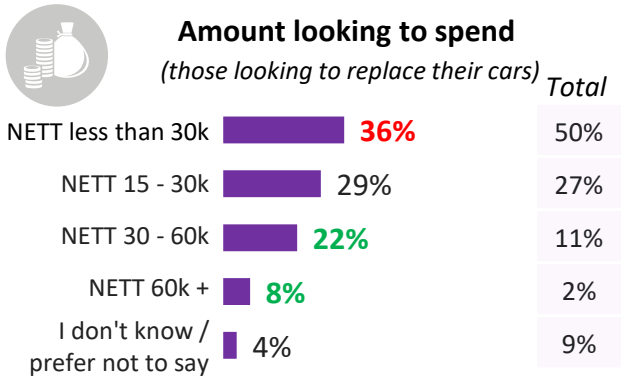
When intend to replace

(the car you use most often)



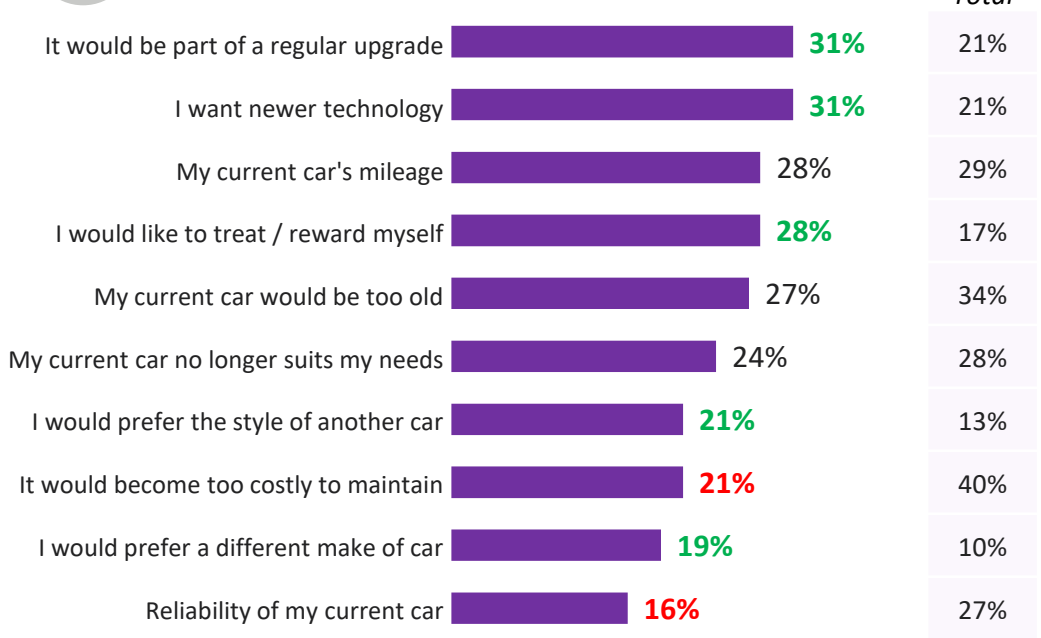
Amount looking to spend

(those looking to replace their cars)



Factors prompting you to replace car

(the car you use most often)



Note: top 10 responses of the Egoists shown in chart

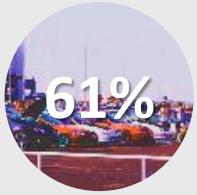
Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Egoists (n=138) ; Those looking to replace their cars total (n=870), Egoists (n=127); **N2:** When do you intend to replace this car? ; **N5** When you replace it, how much would you be looking to spend? ; **N3:** Excluding theft and extensive damage (i.e. write-off), what factors would likely prompt you to replace your car?

Egoists use a combination of *online* & *in person* information sources; they are more likely to *attend a car show*

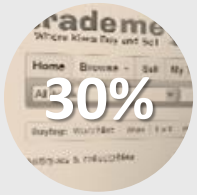
Top 5 Important sources of information in **choosing which car to buy**

68%
Going online



59%
See cars in-person

54%
Visit a dealership



38%
Online - Trade Me

39%
My own knowledge /experience

Main differences

(next car)

29%
43%
Discuss with friends & family

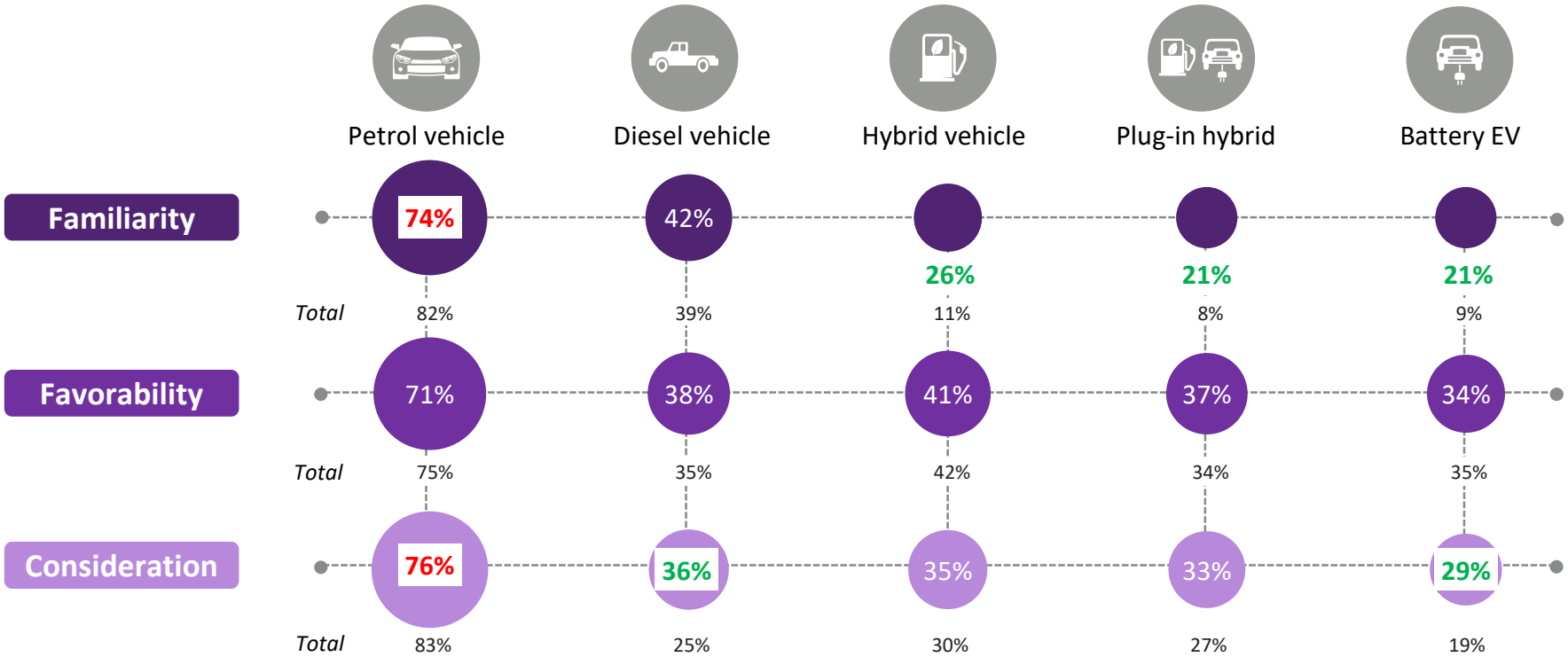
11%
3%
Attend a car show

Green = significantly ↑, Red = significantly ↓ than total sample

Note: top 5 responses of the Egoists shown in chart

Base: Total sample (n=1000), Egoists (n=138); **N6:** If you had to replace your car tomorrow, what would be your most important sources of information in choosing which car to buy?;

Egoists have significantly higher familiarity and consideration for BEVs, whilst lower levels for petrol vehicles



Green = significantly ↑, Red = significantly ↓ than total sample

Note: Familiarity, favorability and consideration figures are top two box percentages

Base: Total sample (n=1000), Egoists (n=138) ; **AET1:** How would you rate your familiarity with the following types of cars? ; **AET2:** How favourable or unfavourable is your overall opinion or impression of the following types of cars? **; N4:** 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?

Egoists have overall lower barriers and are more likely to see *vehicle aesthetics* and *limited body types* as barriers

How the benefits of Electric Vehicles currently compare with barriers

Top 3 Barriers

31% (33%)	Public charging stations are not easy to find
30% (43%)	Are not available at an affordable price
24% (33%)	I don't know enough about them to consider them

Main differences

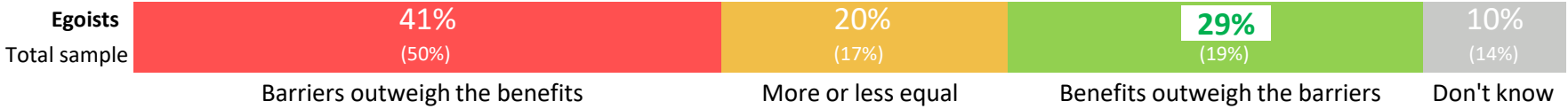
Are not an affordable price	**30%**	43%
I don't know enough about them	**24%**	33%
Uncertainty about the battery life	**23%**	34%
Range not suitable for long distance	**18%**	26%
Do not have a wide range of body types	**16%**	10%
Are odd looking	**13%**	7%
Unsure about environmental benefits	**12%**	7%

Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Egoists (n=138); **EV10:** Below are a list of possible benefits of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest attractive features to you ; **EV11:** Below is a list of possible barriers of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest issues to you. **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? **EV15:** Thinking about the cost to run an electric vehicle compared to a similarly-sized petrol vehicle, how do you think the running costs compare?

Egoists have higher overall benefits, are less likely to value *reduced pollution* & *home charging; innovation* & *acceleration* are more likely to be benefits

How the benefits of Electric Vehicles currently compare with barriers



Top 3 Benefits

41%	43%%	Cheaper to run
37%	39%	Save fuel resources
35%	53%	Produce less pollution / gas emissions

Main differences

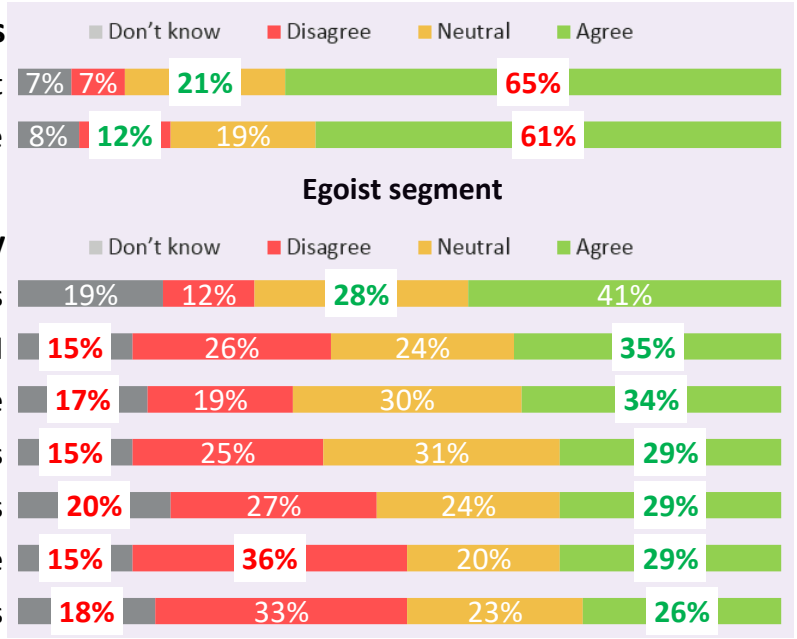
Produce less pollution	**35%**	53%
Can be charged at home	**23%**	34%
Use an innovative technology	**21%**	15%
Accelerate faster than petrol cars	**15%**	6%

Green = significantly ↑ , Red = significantly ↓ than total sample

Base: Total sample (n=1000), Egoists (n=138); **EV10:** Below are a list of possible benefits of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest attractive features to you ; **EV11:** Below is a list of possible barriers of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest issues to you. **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? **EV15:** Thinking about the cost to run an electric vehicle compared to a similarly-sized petrol vehicle, how do you think the running costs compare?

Compared with the total, *Egoists* agree more with the *product technology* statements and less so with the *holistic considerations* statements

Statements about Electric Vehicles



	Don't know (total level)	Disagree (total level)	Neutral (total level)	Agree (total level)
Positive for environment	7%	6%	12%	75%
Way of the future	7%	6%	16%	71%
Day to day driving needs	24%	17%	20%	39%
Just as powerful	27%	28%	22%	23%
Better driving experience	32%	15%	34%	19%
Range of appealing designs	27%	24%	29%	20%
Wide range of models	31%	28%	26%	15%
Affordable price	24%	47%	18%	11%
Long distance driving needs	28%	40%	19%	13%

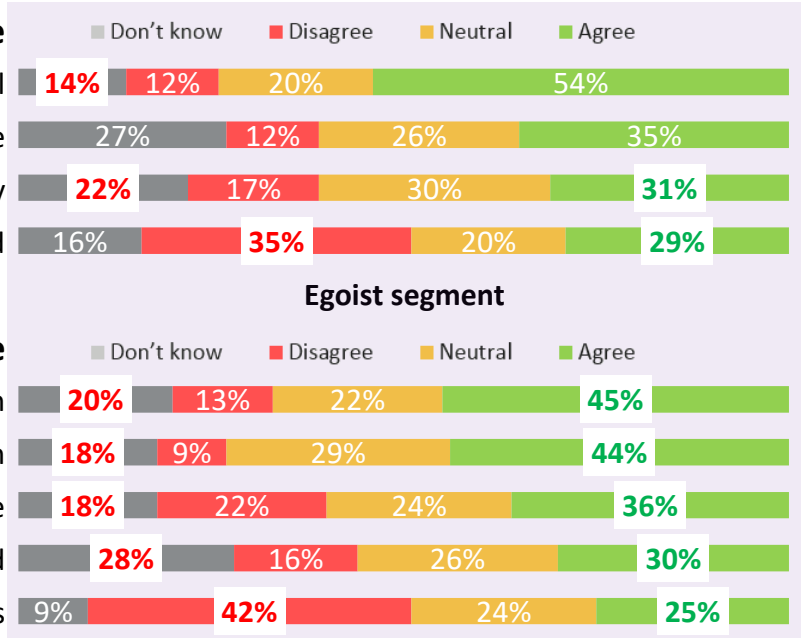
Green = significantly ↑, Red = significantly ↓ than total sample

Note: Statements ranked in order of 'Agree'

Base: Total sample (n=1000) & Egoistic segment (n=138); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement

Compared with the total, *Egoists* agree more with the *downstream infrastructure* statements as well as *quick charging* and *easy to find public charges*

Statements about Electric Vehicles (cont.)



	Don't know (total level)	Disagree (total level)	Neutral (total level)	Agree (total level)
Complementary infrastructure				
Cheaper to run than petrol	22%	8%	19%	51%
Easy to charge at home	32%	11%	24%	32%
Charged quickly	37%	18%	25%	20%
Public charging easy to find	23%	45%	18%	14%
Downstream infrastructure				
Cheaper to maintain	34%	12%	24%	30%
Reliable engine tech	31%	9%	28%	32%
Easily found for purchase	27%	26%	24%	23%
Easily serviced	42%	13%	28%	17%
Common sight on NZ roads	15%	57%	18%	10%

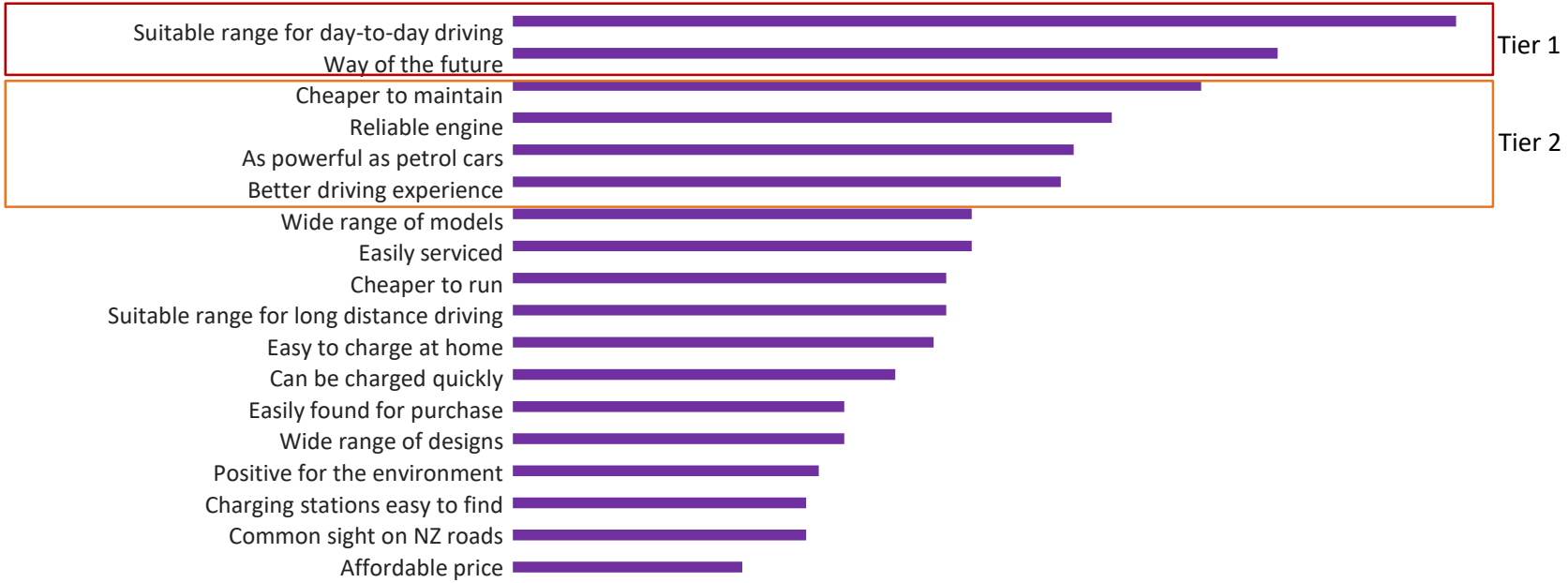
Green = significantly ↑, Red = significantly ↓ than total sample

Note: Statements ranked in order of 'Agree'

Base: Total sample (n=1000) & Egoistic segment (n=138); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement

To improve their uptake, key area of focus is to improve perceptions that they have a *suitable range for day to day driving* and *are the way of the future*

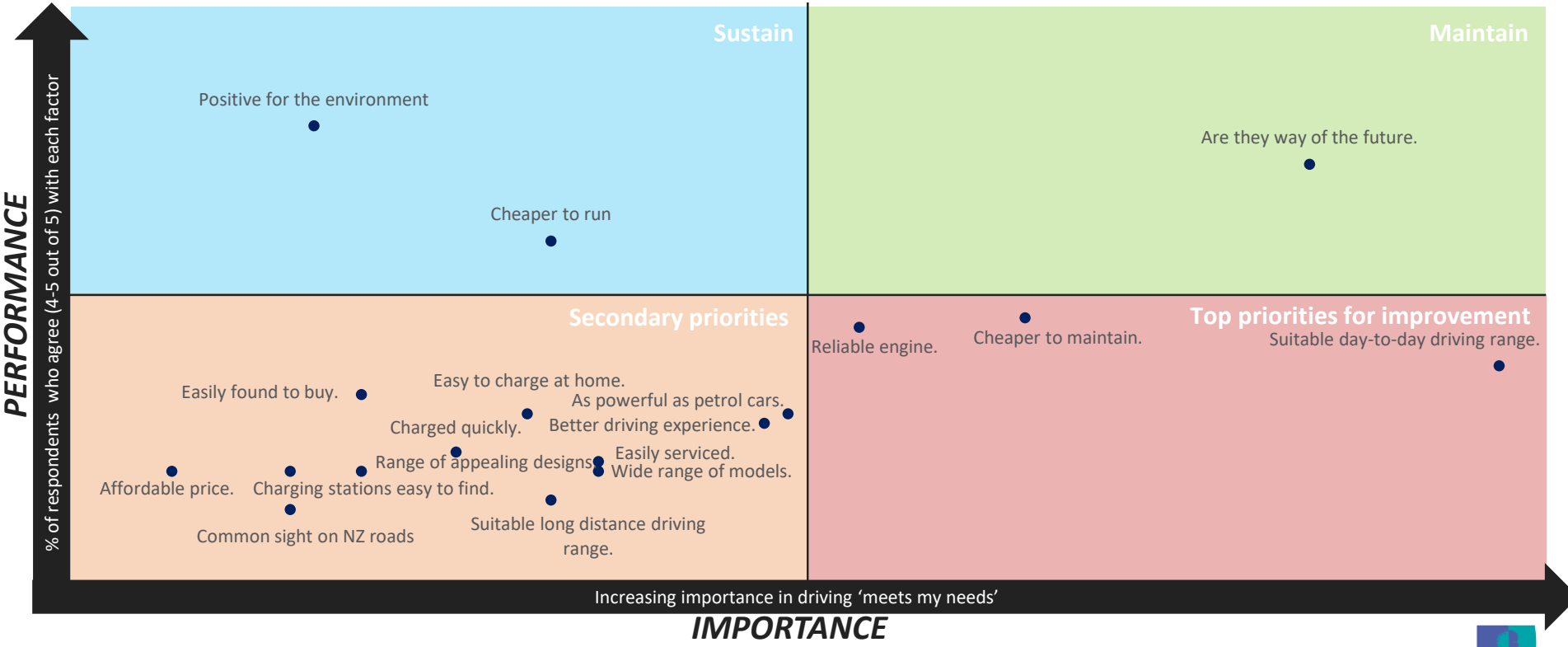
We looked at how various statements about Electric Vehicles are related to 'meeting my needs', and how they relate to all the other statements. This gives us the rank and strength.



Base: Egoists (n=138); **AET5:** Taking everything into account, please could you tell us what your general attitude to, or impression is, of each of these types of cars. Even if you've never used them, you can have an expectation of how they would meet your needs. **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles?

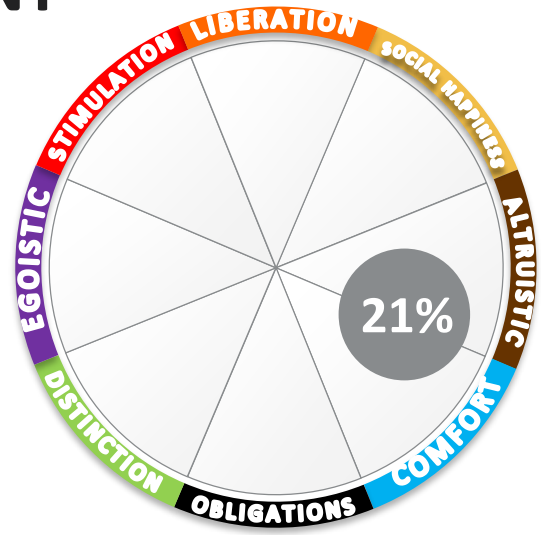
WHAT PERCEPTIONS SHOULD WE FOCUS ON IMPROVING?

Features such as *reliable engine*, *suitable day-to-day driving range* & *cheaper to maintain* are top priorities to improve perceptions

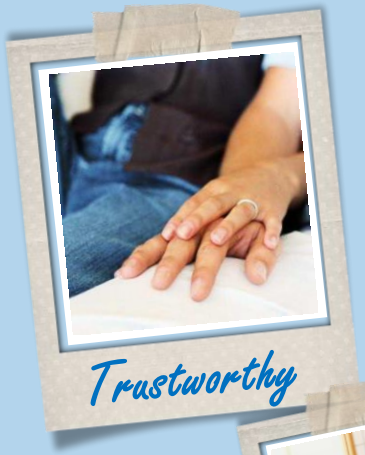


Base: Egoists (n=138) ; **AET5:** Taking everything into account, please could you tell us what your general attitude to, or impression is, of each of these types of cars. Even if you've never used them, you can have an expectation of how they would meet your needs. **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles?

ALTRUISTIC COMFORT SEGMENT



OBLIGATIONS
ALTRUISTIC COMFORT


Trustworthy

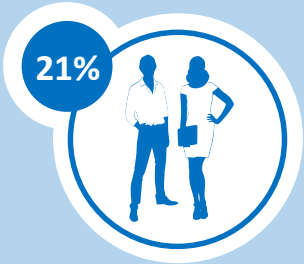

Collective

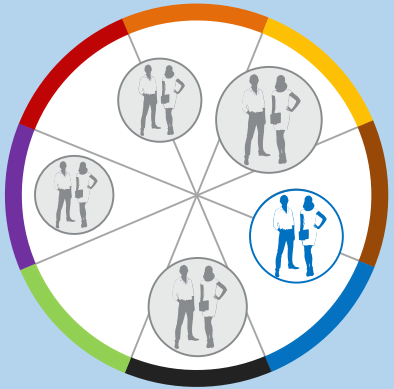

Maternal


Tranquil

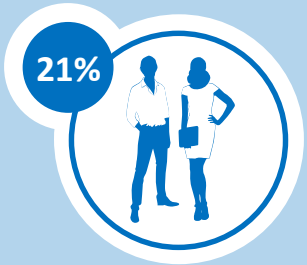

Comfortable

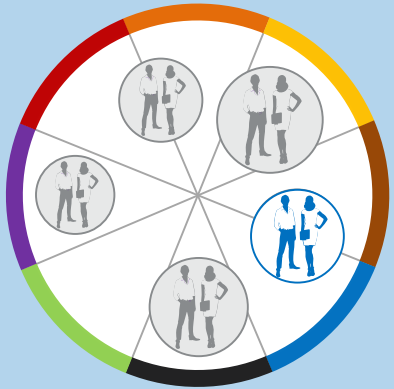

Responsible





ALTRUISTIC COMFORT





A safe haven and a reflection of my responsibilities

It's for people who are not risk-takers and feel some responsible with caring for everyone around them. They like to feel protected both physically and mentally. They enjoy the comfort of the routine or things that are predictable. They care about issues beyond their immediate needs or personal preferences. Cars provide them with a barrier from the outside world and gives them a means to take care of people.

Key motivations defining the ALTRUISTIC COMFORT segment

Emotional Benefits
(How it should make me feel)

- Makes me feel protected.
- Makes me feel taken care of.
- Makes me feel like a responsible member of society.

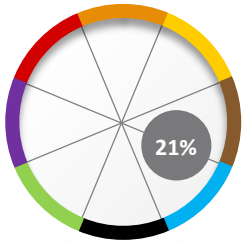
Social Identity
(What it should reflect upon me)

- People who take comfort in making sensible decisions.
- People where safety is paramount.
- People who are family-oriented.

Functional Characteristics
(How it should help me)

- Technology that enhances comfort (e.g. air conditioning, heated seat, sun-roof)
- Technology that enhances safety (e.g. air bags, rear-view camera, sensor departure lane)
- Technology that improves cost efficiency (fuel efficiency, mileage estimator)

Altruistic Comfort are more likely to have an income over $60K



46% 47% Male

54% *53%* Female

38% 37% 18-39 year-olds

45% 44% 40-64 year-olds

17% 19% 65 years and over

22% 20% Upper NI (excl. AKL)
35% 33% Auckland
23% 23% Lower NI
12% 16% Upper SI
9% 8% Lower SI

9% 9% NZ Maori
76% 78% European
3% 2% Pacific People
14% 13% Asian
5% 4% Others

84% 82% A stand-alone house
7% 9% Semi-detached house
7% 7% An apartment
2% 1% Other

24% 34% HH income <$60k
28% 26% HH income $60,001k-$100k
30% 25% HH income >$100k
18% 15% Don't know / rather not say

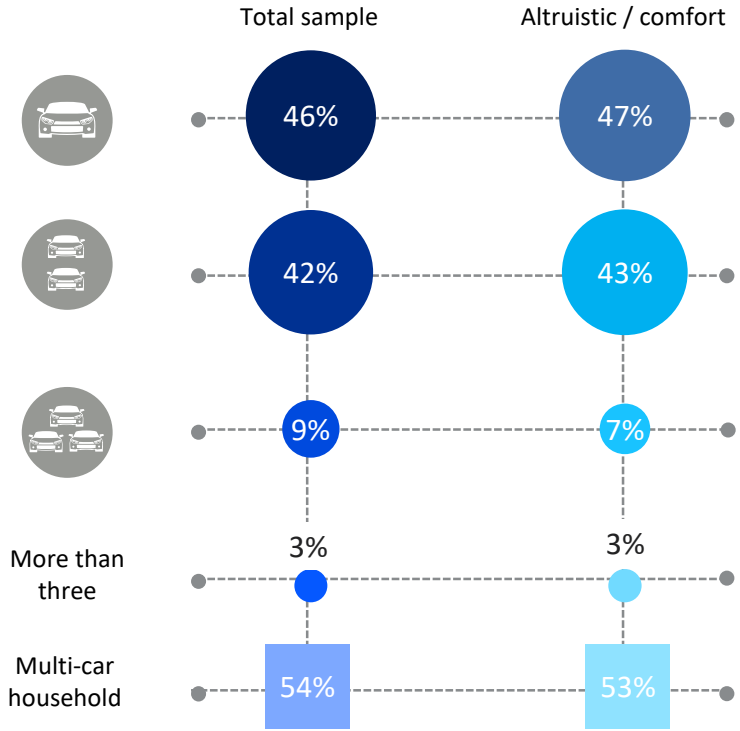
61% 61% Household no kids
37% 37% HH with kids (under 18)
38% 38% HH with kids (any age)
12% 16% HH with kids (under 5)
10% 8% Younger couple no kids
10% 13% Single person HH
24% 24% Older couple no kids

Green = significantly ↑, Red = significantly ↓ than total sample

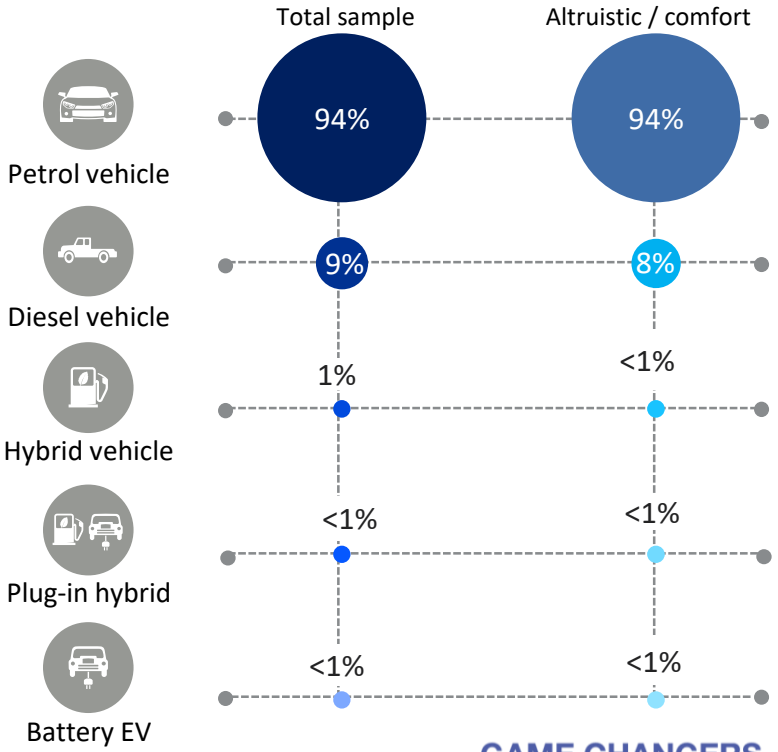
Base: Total sample (n=1000), Altruistic / Comfort (n=209) ; **QB:** Which of the following best describes your age group? ; **QC:** Which of the following best describes your gender? **Q123:** Which ethnic group or groups best describe you? ; **Q124:** Which one of the following best describes where you live? ; **Q121:** Which of the following best describes your **total household income** before tax? ; **Q122:** Which of the following best describes your household? ; **Q127:** Which of the following best describes your home?

Number and type of vehicles owned is similar to the average

Number of vehicles owned in household



Type of cars in household

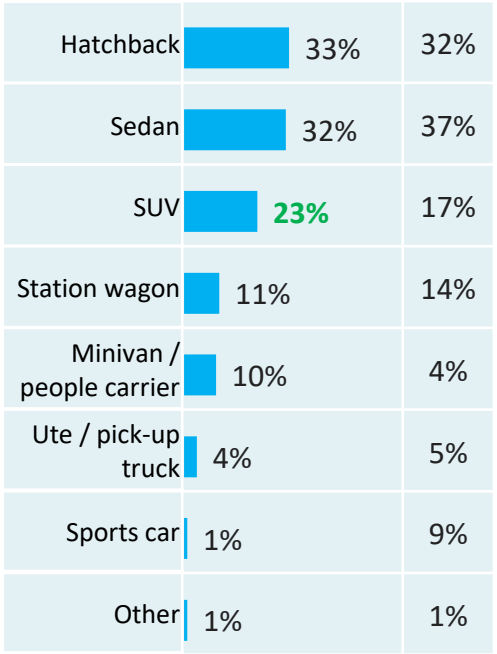


Green = significantly ↑, Red = significantly ↓ than total sample

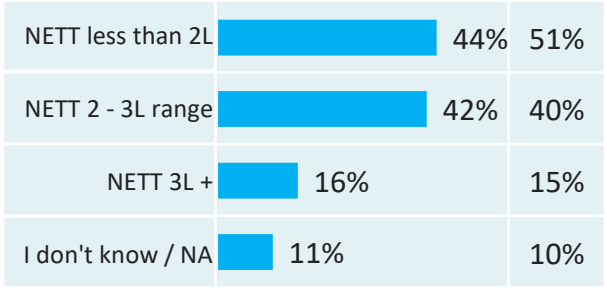
Base: Total sample (n=1000), Altruistic / Comfort (n=209) ; **C1:** How many cars do you currently own (or jointly own) within your household? ; **C3:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what type of car it is?

Altruistic Comfort are more likely to own an *SUV* and tend to spend slightly more on their vehicles

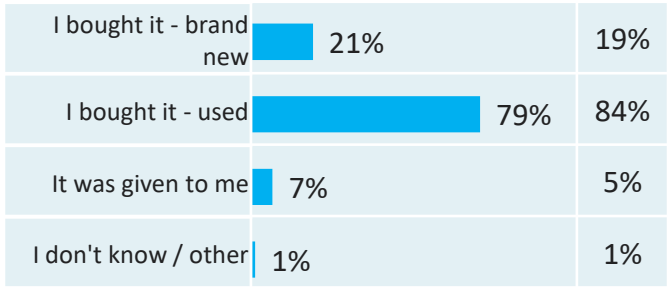
Body type of car(s)



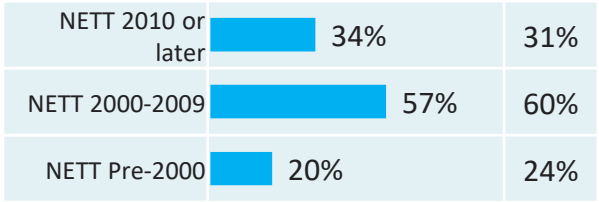
Engine size(s) (in litres)



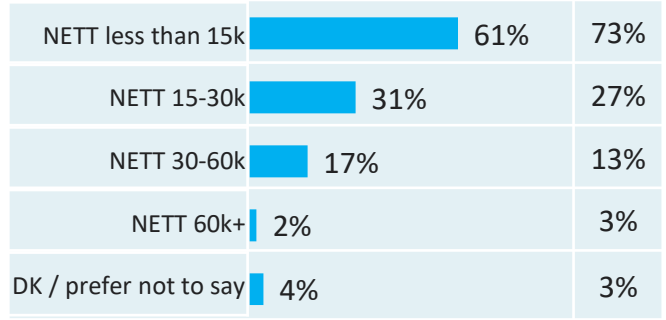
How acquired vehicle(s)



Year of manufacture(s)



Amount paid for car(s)



Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Altruistic / Comfort (n=209) ; **C5:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what body type it has? ; **C9:** Please tell us the car's engine size (in litres)? ; **C7:** Please tell us what year the car was manufactured? ; **C6a:** How did you take ownership of it? ; **C8:** How much did you pay for your car?

Altruistic Comfort tend to use their primary car for *running errands* and *leisure activities*; while secondary cars are more likely to be used for *leisure activities*

Main differences in usage
(the car you use most often)

Running errands
82%
(77%)

Leisure activities
69%
(63%)

Main differences in usage
(secondary cars)

Leisure activities
49%
(43%)

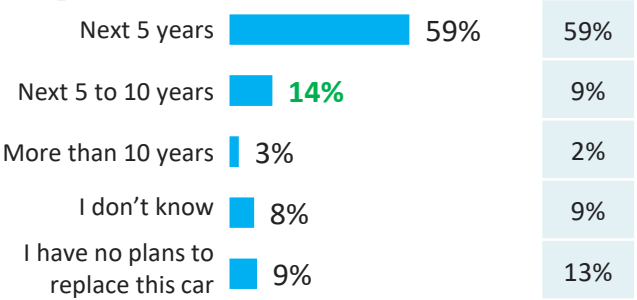
Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Altruistic / Comfort (n=209); Altruistic / Comfort with secondary cars (n=41), Total sample with secondary cars (n=252) ; **U1:** Please tell us what you use your car for?

Majority plan to replace their cars in next 5 years; more likely to replace for *greater fuel efficiency*, *newer technology* or *improved safety*

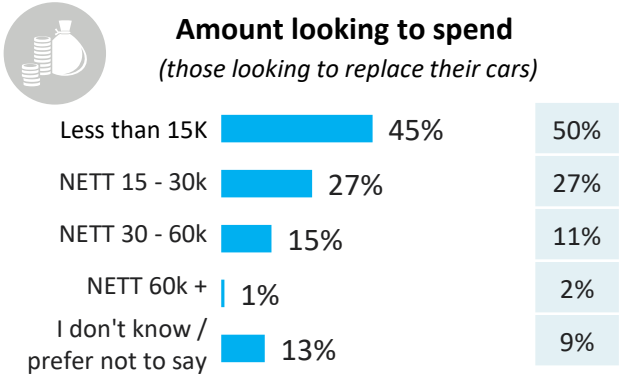
When intend to replace

(the car you use most often)



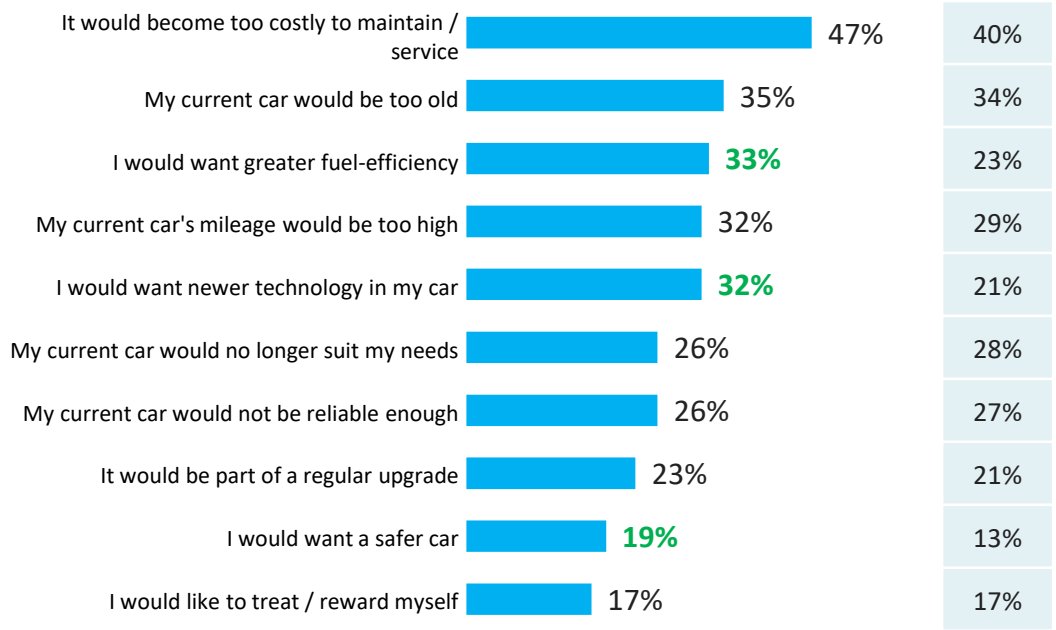
Amount looking to spend

(those looking to replace their cars)



Factors prompting you to replace car

(the car you use most often)



Note: top 10 responses of the Altruistic / Comfort shown in chart

Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Altruistic / Comfort (n=209) ; Those looking to replace their cars total (n=870), Altruistic / Comfort (n=191); **N2:** When do you intend to replace this car? ; **N5** When you replace it, how much would you be looking to spend? ; **N3:** Excluding theft and extensive damage (i.e. write-off), what factors would likely prompt you to replace your car?

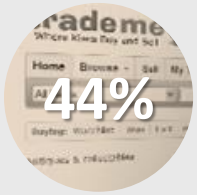
They are more likely to *visit a dealership, manufacturer website, non government websites & online – discussion forums*

Top 5 Important sources of information in **choosing which car to buy**

68%
Going online

59%
See cars in-person

54%
Visit a dealership



43%
Discuss with family & friends

39%
My own knowledge /experience

Main differences

(next car)

33%
23%
Online – car manufacturer websites

32%
22%
Online – non government websites

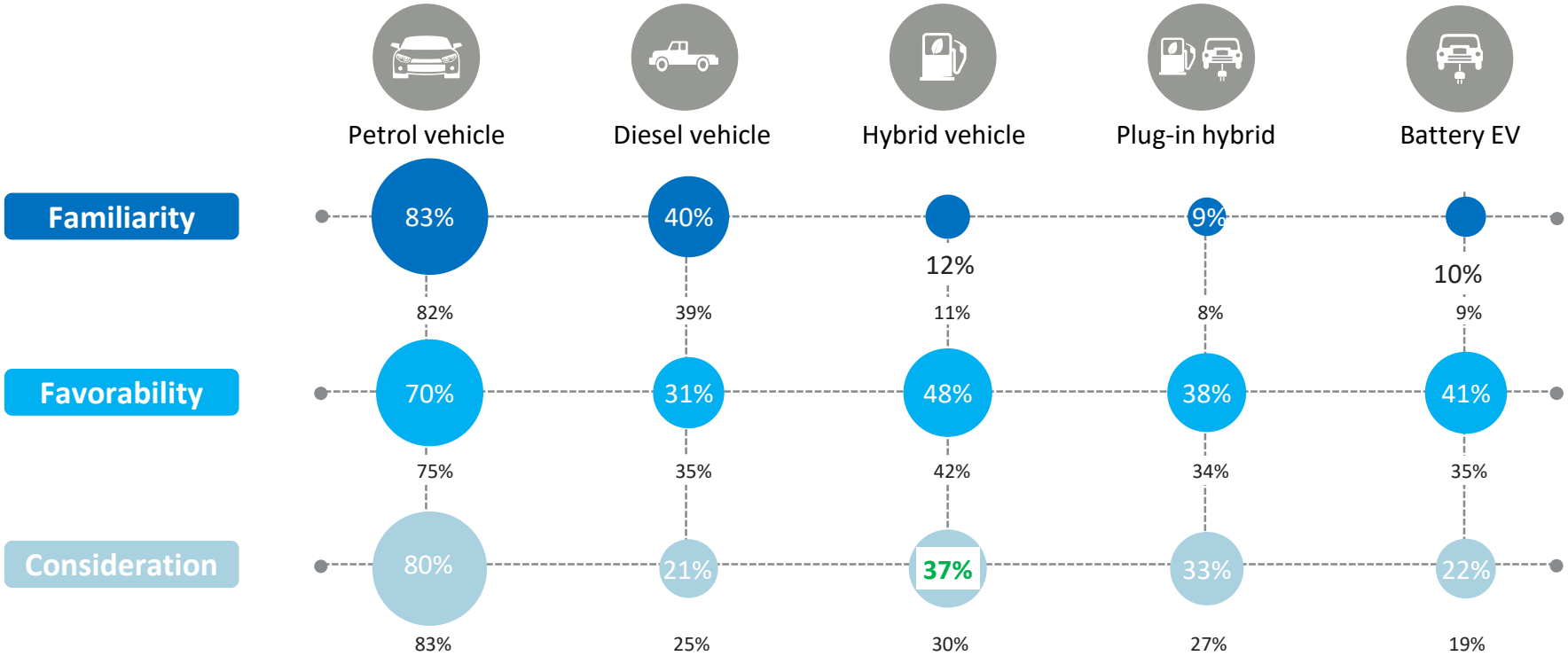
19%
13%
Online – discussion forums

Green = significantly ↑, Red = significantly ↓ than total sample

Note: top 5 responses of the Altruistic / Comfort shown in chart

Base: Total sample (n=1000), Altruistic / Comfort (n=209); **N6:** If you had to replace your car tomorrow, what would be your most important sources of information in choosing which car to buy?;

More likely to *consider* hybrids; *favorability* towards BEVs is strong, but there is room for improvement in *familiarity* and *consideration*



Green = significantly ↑, Red = significantly ↓ than total sample

Note: Familiarity, favorability and consideration figures are top two box percentages

Base: Total sample (n=1000), Altruistic / Comfort (n=209) ; **AET1:** How would you rate your familiarity with the following types of cars? ; **AET2:** How favourable or unfavourable is your overall opinion or impression of the following types of cars? **; N4:** 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?

Generally on par with the total sample on strength of barriers, *affordability*, *access to public charging stations* & *battery life / replacement* are largest barriers

How the benefits of Electric Vehicles currently compare with barriers

Top 3 Barriers

47% 43% They are not available at an affordable price

36% 33% Public charging stations are not easy to find

35% 34% Uncertainty about battery life and replacement

Main differences

No significant differences

Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Altruistic / comfort (n=209); **EV10:** Below are a list of possible benefits of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest attractive features to you ; **EV11:** Below is a list of possible barriers of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest issues to you. **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? **EV15:** Thinking about the cost to run an electric vehicle compared to a similarly-sized petrol vehicle, how do you think the running costs compare?

Generally on par with the total sample on strength of benefits, *less pollution*, *cost savings* & *reduced fuel resources* are largest recognised benefits

How the benefits of Electric Vehicles currently compare with barriers

Top 3 Benefits

57% 53%	Produce less pollution / gas emissions
48% 43%	Cheaper to run
38% 39%	Save fuel resources

Main differences

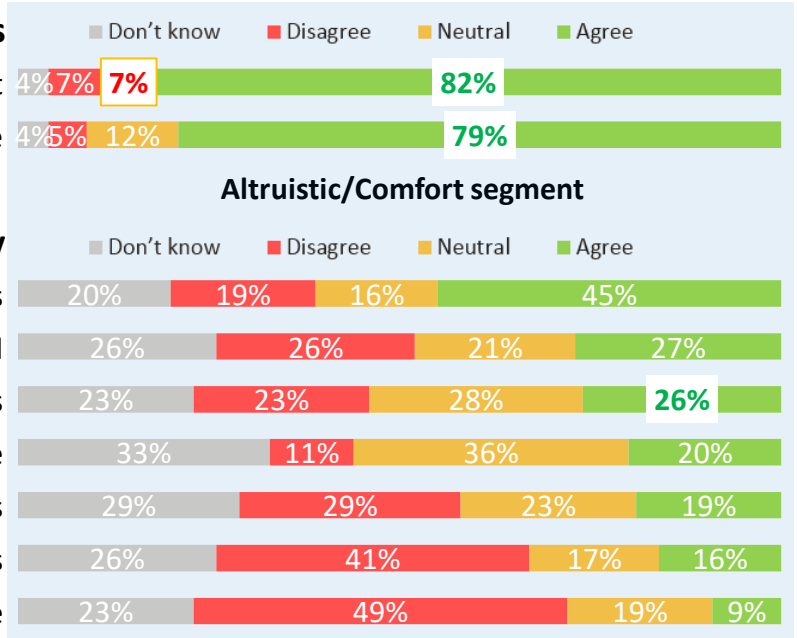
No significant differences

Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Altruistic / comfort (n=209); **EV10:** Below are a list of possible benefits of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest attractive features to you ; **EV11:** Below is a list of possible barriers of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest issues to you. **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? **EV15:** Thinking about the cost to run an electric vehicle compared to a similarly-sized petrol vehicle, how do you think the running costs compare?

The Altruistic Comfort segment are more likely to agree with the *Holistic considerations*, but there's scope to address *price* and *long-distance driving*

Statements about Electric Vehicles



	Don't know (total level)	Disagree (total level)	Neutral (total level)	Agree (total level)
Positive for environment	7%	6%	12%	75%
Way of the future	7%	6%	16%	71%
Day to day driving needs	24%	17%	20%	39%
Just as powerful	27%	28%	22%	23%
Range of appealing designs	27%	24%	29%	20%
Better driving experience	32%	15%	34%	19%
Wide range of models	31%	28%	26%	15%
Long distance driving needs	28%	40%	19%	13%
Affordable price	24%	47%	18%	11%

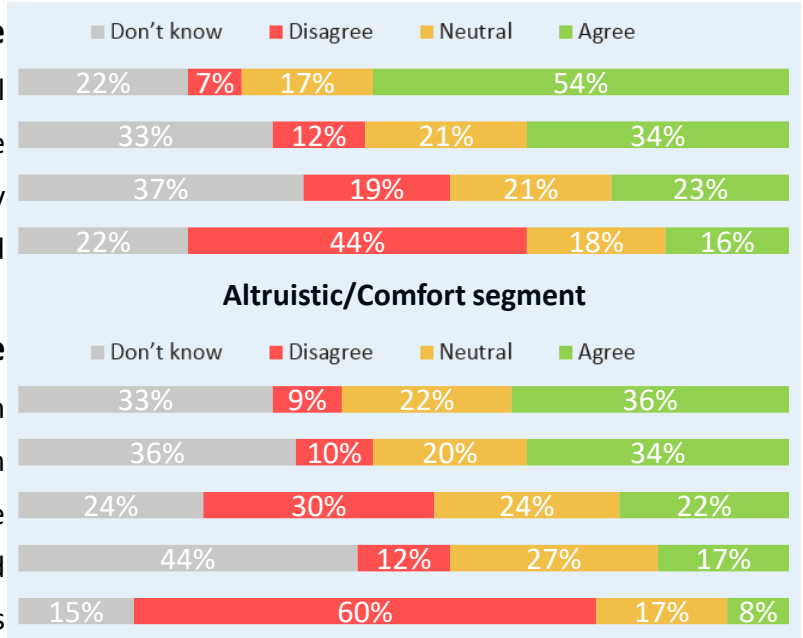
Green = significantly ↑, Red = significantly ↓ than total sample

Note: Statements ranked in order of 'Agree'

Base: Total sample (n=1000) & Altruistic/Comfort segment (n=209); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement

Agreement with *infrastructure statements* is broadly in line with the total average, there's scope for EECA to fill the *infrastructure knowledge* gap

Statements about Electric Vehicles (cont.)



	Don't know (total level)	Disagree (total level)	Neutral (total level)	Agree (total level)
Cheaper to run than petrol	22%	8%	19%	51%
Easy to charge at home	33%	11%	24%	32%
Charged quickly	37%	18%	25%	20%
Public charging easy to find	23%	45%	18%	14%
Reliable engine tech	31%	9%	28%	32%
Cheaper to maintain	34%	12%	24%	30%
Easily found for purchase	27%	26%	24%	23%
Easily serviced	42%	13%	28%	17%
Common sight on NZ roads	15%	57%	18%	10%

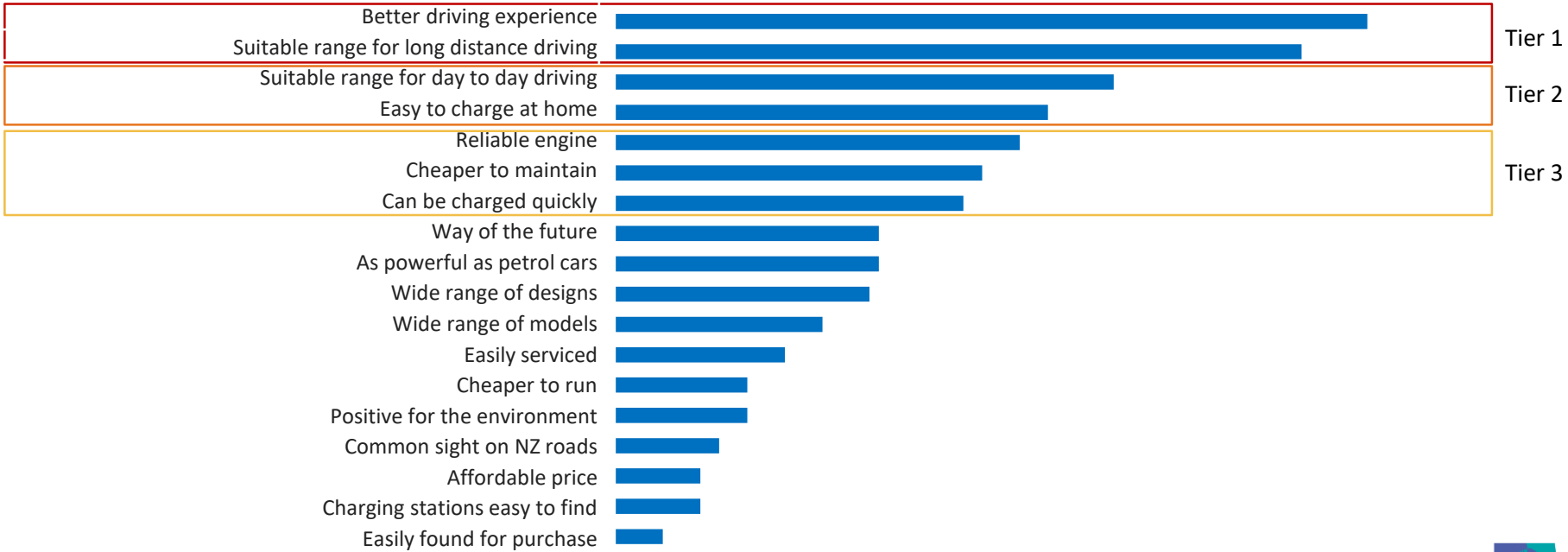
Green = significantly ↑, Red = significantly ↓ than total sample

Note: Statements ranked in order of 'Agree'

Base: Total sample (n=1000) & Altruistic/Comfort segment (n=209); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement

To improve their uptake, key area of focus is to improve perceptions that they provide a *better driving experience* and have a *suitable range for day to day driving*

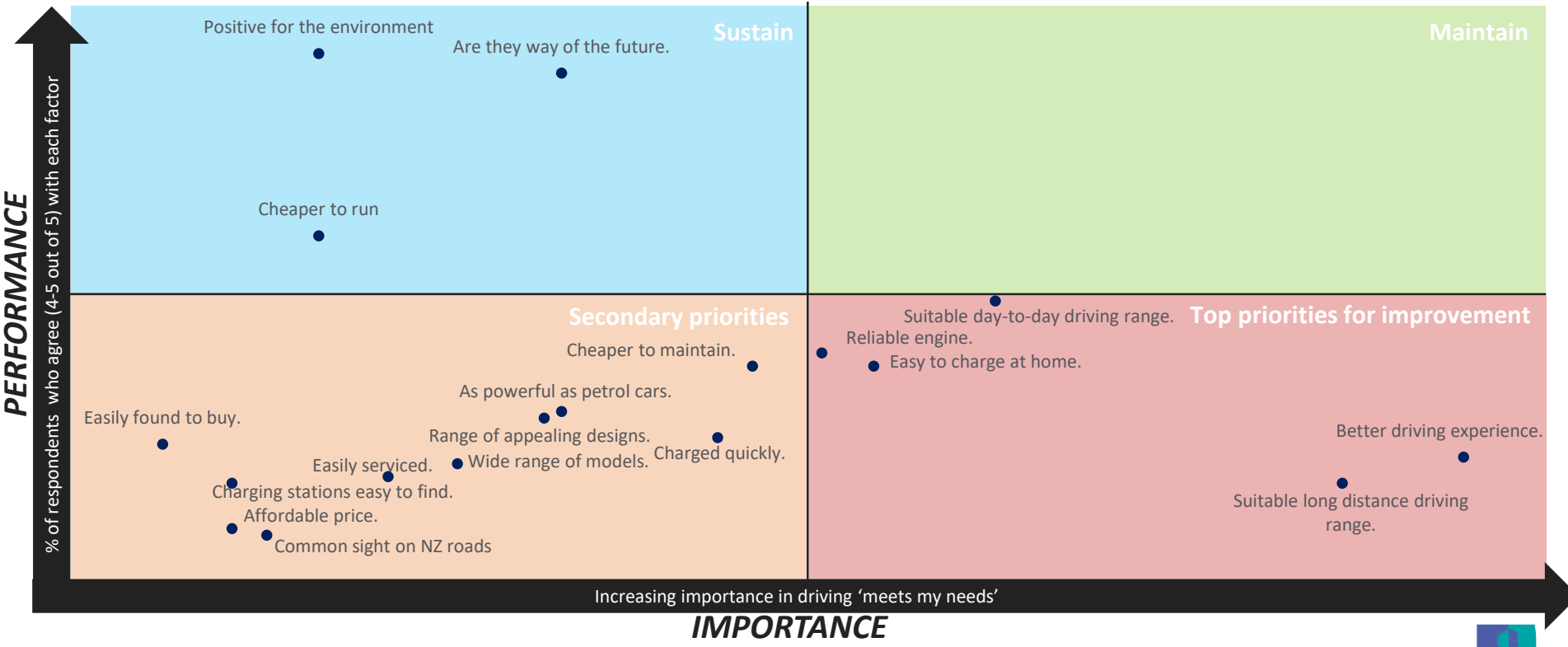
We looked at how various statements about Electric Vehicles are related to 'meeting my needs', and how they relate to all the other statements. This gives us the rank and strength.



Base: Altruistic / Comfort (n=209); **AET5:** Taking everything into account, please could you tell us what your general attitude to, or impression is, of each of these types of cars. Even if you've never used them, you can have an expectation of how they would meet your needs. **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles?

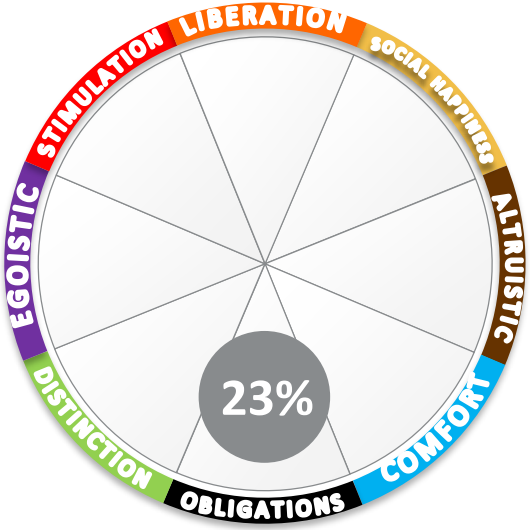
WHAT PERCEPTIONS SHOULD WE FOCUS ON IMPROVING?

Driving range, charging accessibility, engine reliability & better driving experience are the top priorities for improvement

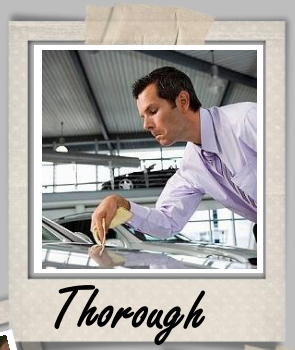


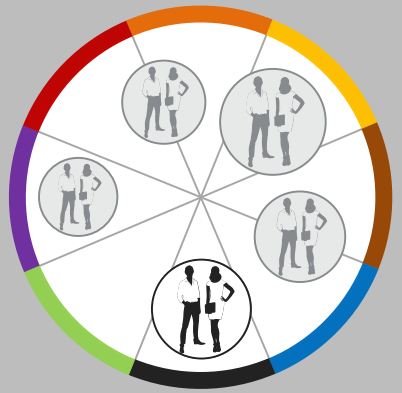
Base: Altruistic / Comfort (n=209) ; **AET5:** Taking everything into account, please could you tell us what your general attitude to, or impression is, of each of these types of cars. Even if you've never used them, you can have an expectation of how they would meet your needs. **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles?

OBLIGATIONS SEGMENT

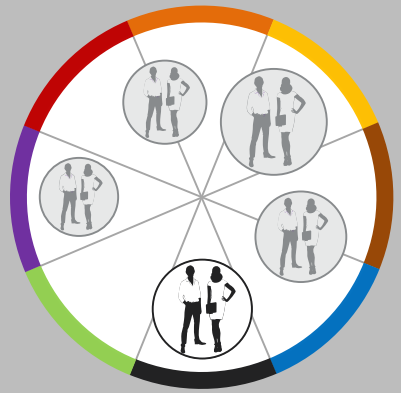


OBLIGATIONS





OBLIGATIONS



Just gets me from A to B

It's for pragmatic people who like to feel productive. They tend to see life as a series of obligations they need to cross-off their list. Some may even get a sense of accomplishment from getting things done. They are more likely to make decisions based on a combination of practicality and affordability. Cars are just a tool to do what they need to do in the most effective and affordable way. When it comes to cars, being pragmatic can be an intrinsic element of a person value system or just imposed by a lack of finances.

Key motivations defining the OBLIGATIONS segment

Emotional Benefits
(How it should make me feel)

- Helps me practically do what I need to do.
- Simply allows me to get from A to B.
- Makes me feel like I made a pragmatic choice about how I spend my money.

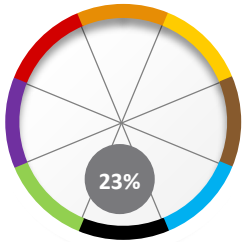
Social Identity
(What it should reflect upon me)

- People who are not attached to their vehicle.
- People who take comfort in making sensible decisions.
- People where safety is paramount.

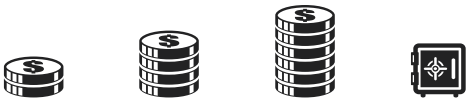
Functional Characteristics
(How it should help me)

- Economical engine
- Availability of spare parts and repair specialist
- Technology that improves cost efficiency (fuel efficiency , mileage estimator)

Obligations are more likely to have a HH income less than $60k, be over 65 years old and have no children in their HH



25% 20% Upper NI (excl. AKL)
27% 33% Auckland
24% 23% Lower NI
17% 16% Upper SI
7% 8% Lower SI



44% 34% HH income <$60k
25% 26% HH income $60,001k-$100k
17% 25% HH income >$100k
13% 15% Don't know / rather not say

49% 47% Male

51% *53%* Female

7% 9% NZ Maori
86% 78% European
0% 2% Pacific People
6% 13% Asian
4% 4% Others

78% 61% Household no kids
21% 37% HH with kids (under 18)
21% 38% HH with kids (any age)
4% 16% HH with kids (under 5)
20% 13% Single person HH
35% 24% Older couple no kids

18% 37% 18-39 year-olds
48% 44% 40-64 year-olds
34% 19% 65 years and over

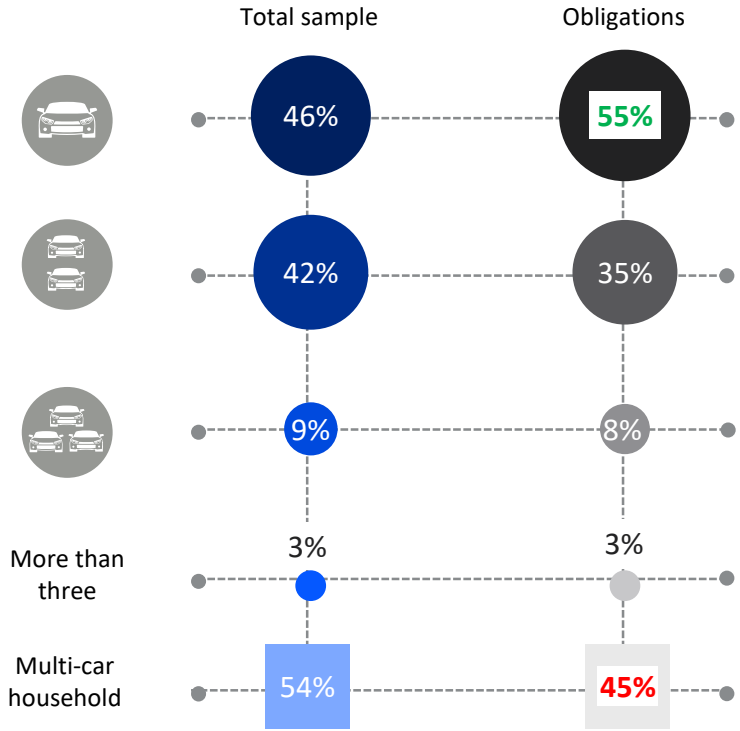
81% 82% A stand-alone house
11% 9% Semi-detached house
7% 7% An apartment
1% 1% Other

Green = significantly ↑, Red = significantly ↓ than total sample

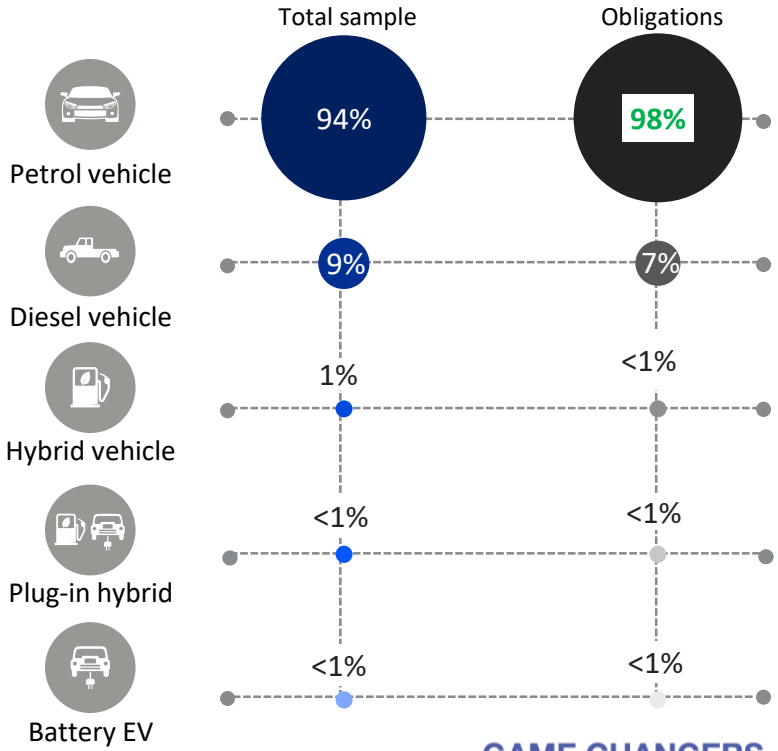
Base: Total sample (n=1000), Obligations (n=231) ; **QB:** Which of the following best describes your age group? ; **QC:** Which of the following best describes your gender? **Q123:** Which ethnic group or groups best describe you? ; **Q124:** Which one of the following best describes where you live? ; **Q121:** Which of the following best describes your **total household income** before tax? ; **Q122:** Which of the following best describes your household? ; **Q127:** Which of the following best describes your home?

Obligations are more likely to own a petrol vehicle and tend towards to being single car households

Number of vehicles owned in household



Type of cars in household

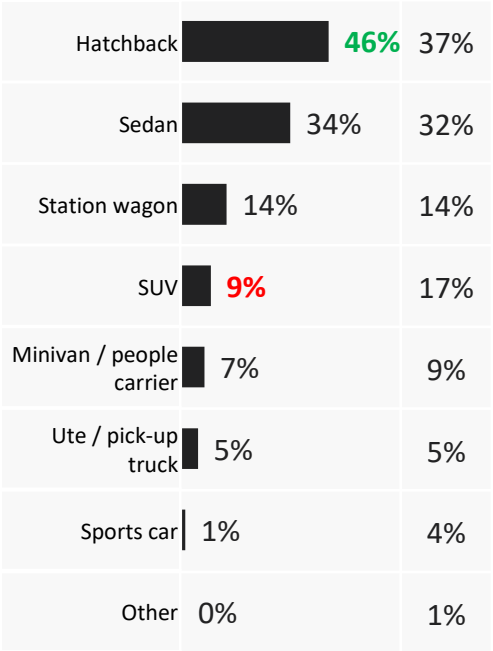


Green = significantly ↑, Red = significantly ↓ than total sample

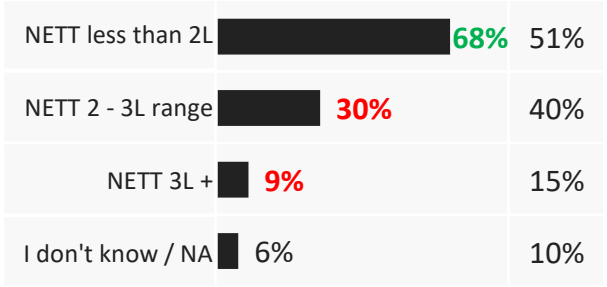
Base: Total sample (n=1000), Obligations (n=231) ; **C1:** How many cars do you currently own (or jointly own) within your household? ; **C3:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what type of car it is?

Obligations are more likely to own *hatchbacks* with *smaller engines*, they are less likely to own newer vehicles that are priced over $30K

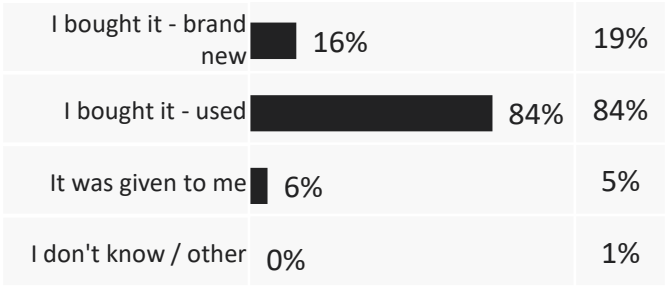
Body type of car(s)



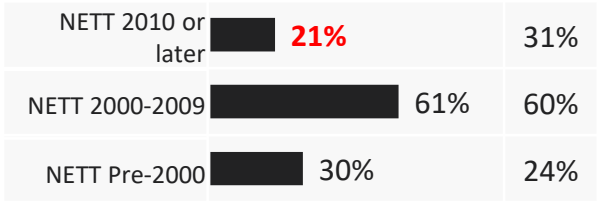
Engine size(s) (in litres)



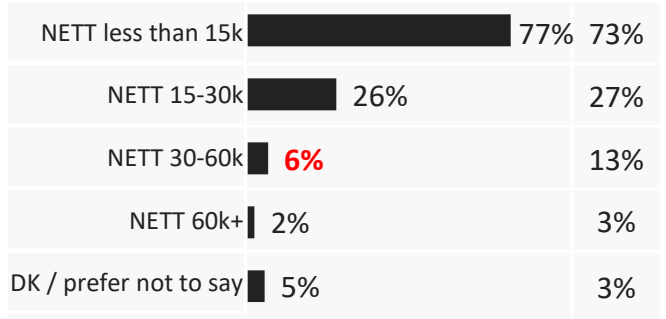
How acquired vehicle(s)



Year of manufacture(s)



Amount paid for car(s)



Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Obligations (n=231) ; **C5:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what body type it has? ; **C9:** Please tell us the car's engine size (in litres)? ; **C7:** Please tell us what year the car was manufactured? ; **C6a:** How did you take ownership of it? ; **C8:** How much did you pay for your car?

Main car is more likely to be used *for running errands*, while those who owned a secondary vehicles tend to use these for *leisure activities*

Main differences in usage
(the car you use most often)

Running errands

84%

(77%)

Main differences in usage
(secondary cars)

Leisure activities

36%

(43%)

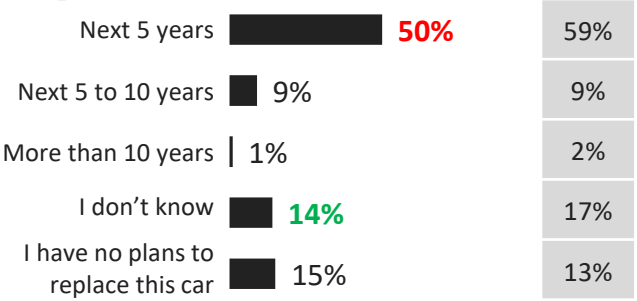
Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Obligations (n=231); Obligations with secondary cars (n=48), Total sample with secondary cars (n=252) ; **U1:** Please tell us what you use your car for?

Obligations are less likely to plan to replace their car within 5 years and intend to spend less than 15K; *costliness* & *reliability* are common triggers to replace

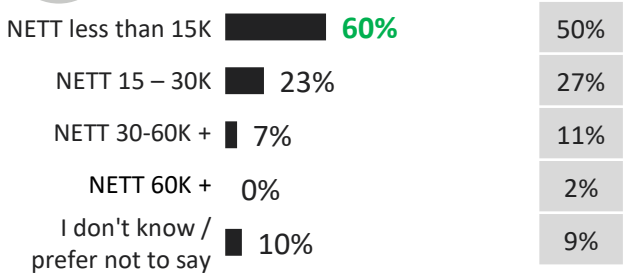
When intend to replace

(the car you use most often)



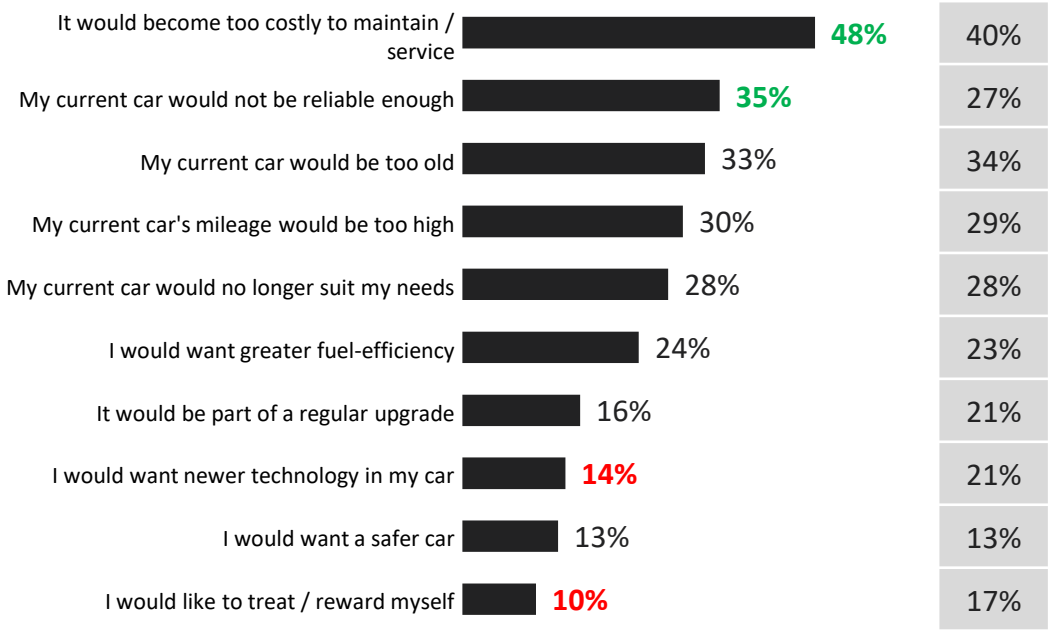
Amount looking to spend

(those looking to replace their cars)



Factors prompting you to replace car

(the car you use most often)



Note: top 10 responses of Obligations shown in chart

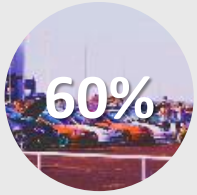
Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Obligations (n=231) ; **N2:** When do you intend to replace this car? ; **N5** When you replace it, how much would you be looking to spend? ; **N3:** Excluding theft and extensive damage (i.e. write-off), what factors would likely prompt you to replace your car?

Obligations use a combination of *online* & *in person* information sources, they also rely on their own *personal knowledge / experiences*

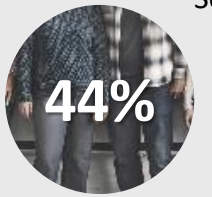
Top 5 Important sources of information in **choosing which car to buy**

68%
Going online



59%
See cars in-person

54%
Visit a dealership



39%
My own knowledge /experience

43%
Discuss with family and friends

Main differences
(next car)

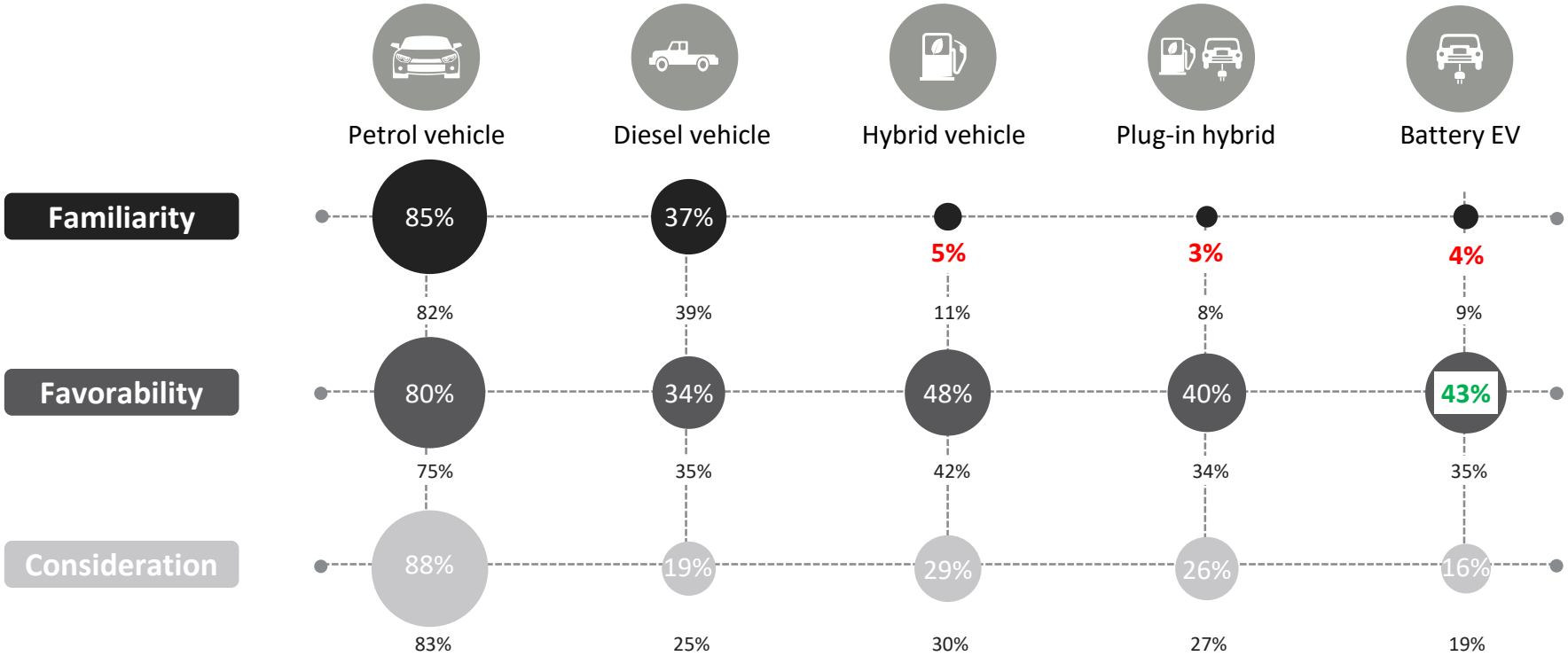
No significant differences

Green = significantly ↑, Red = significantly ↓ than total sample

Note: top 5 responses of the Obligations shown in chart

Base: Total sample (n=1000), Obligations (n=231); **N6:** If you had to replace your car tomorrow, what would be your most important sources of information in choosing which car to buy?;

More likely to have a high level of *favorability* towards BEVs, but are less likely to be *familiar* towards BEVs, PHEVs and Hybrids



Green = significantly ↑, Red = significantly ↓ than total sample

Note: Familiarity, favorability and consideration figures are top two box percentages

Base: Total sample (n=1000), Obligations (n=231) ; **AET1:** How would you rate your familiarity with the following types of cars? ; **AET2:** How favourable or unfavourable is your overall opinion or impression of the following types of cars? **; N4:** 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?

Generally on par with the total sample on strength of barriers, obligations more likely to feel that *affordability* is a barrier towards owning a BEVs

How the benefits of Electric Vehicles currently compare with barriers

Top 3 Barriers

54% (43%) They are not available at an affordable price

39% (33%) Public charging stations are not easy to find

38% (33%) I don't know enough about them to consider them

Main differences

Are not an affordable price	**54%**	43%
I'm unsure about the environmental benefits	**3%**	7%

Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Obligations (n=231); **EV10:** Below are a list of possible benefits of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest attractive features to you ; **EV11:** Below is a list of possible barriers of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest issues to you. **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? **EV15:** Thinking about the cost to run an electric vehicle compared to a similarly-sized petrol vehicle, how do you think the running costs compare?

Generally on par with the total sample on strength of benefits, *reduced pollution*, *cheaper to run* & using *renewable energy* most widely recognised benefits

How the benefits of Electric Vehicles currently compare with barriers

Top 3 Benefits

57% 53%	Produce less pollution / gas emissions
43% 43%	Cheaper to run
40% 35%	Use renewable energy

Main differences

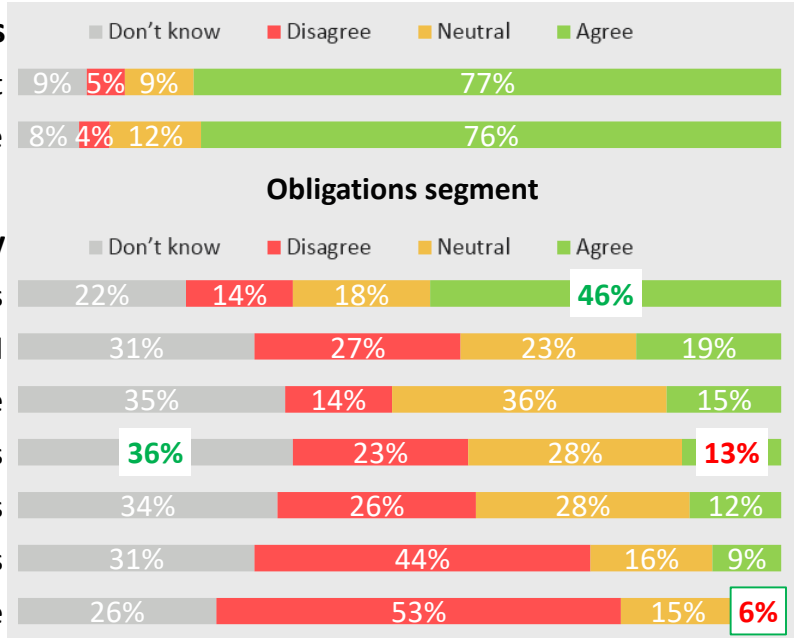
No significant differences

Green = significantly ↑ , Red = significantly ↓ than total sample

Base: Total sample (n=1000), Obligations (n=231); **EV10:** Below are a list of possible benefits of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest attractive features to you ; **EV11:** Below is a list of possible barriers of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest issues to you. **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? **EV15:** Thinking about the cost to run an electric vehicle compared to a similarly-sized petrol vehicle, how do you think the running costs compare?

Obligations are more likely vs total to agree that *EVs have a driving range for their day-to-day needs,* but less so for *design* and an *affordable price*

Statements about Electric Vehicles



	Don't know (total level)	Disagree (total level)	Neutral (total level)	Agree (total level)
Holistic considerations				
Positive for environment	7%	6%	12%	75%
Way of the future	7%	6%	16%	71%
Product technology				
Day to day driving needs	24%	17%	20%	39%
Just as powerful	27%	28%	22%	23%
Better driving experience	32%	15%	34%	19%
Range of appealing designs	27%	24%	29%	20%
Wide range of models	31%	28%	26%	15%
Long distance driving needs	28%	40%	19%	13%
Affordable price	24%	47%	18%	11%

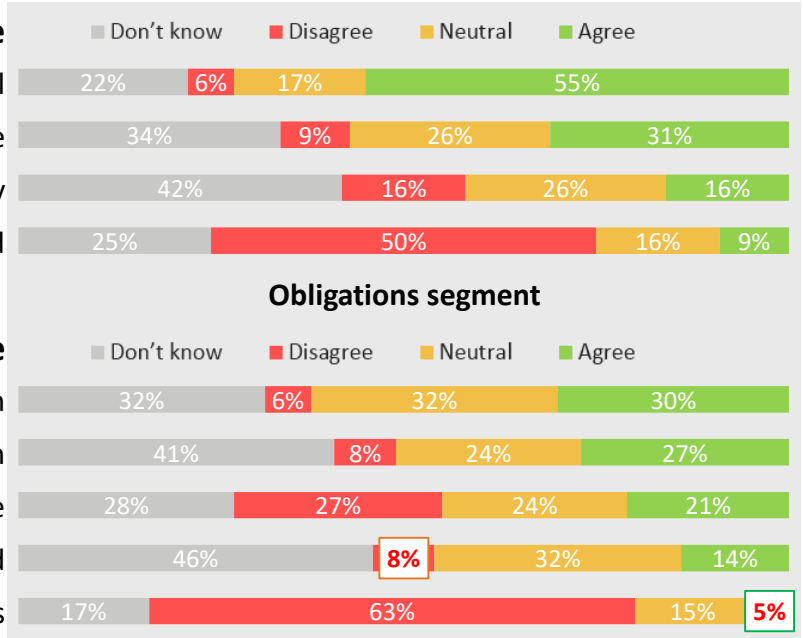
Green = significantly ↑, Red = significantly ↓ than total sample

Note: Statements ranked in order of 'Agree'

Base: Total sample (n=1000) & Obligations segment (n=231); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement

Agreement with the *infrastructure* statements were broadly in line with the total, there's scope to address the *infrastructure* knowledge barriers

Statements about Electric Vehicles (cont.)



	Don't know (total level)	Disagree (total level)	Neutral (total level)	Agree (total level)
Complementary infrastructure				
Cheaper to run than petrol	22%	8%	19%	51%
Easy to charge at home	33%	11%	24%	32%
Charged quickly	37%	18%	25%	20%
Public charging easy to find	23%	45%	18%	14%
Downstream infrastructure				
Reliable engine tech	31%	9%	28%	32%
Cheaper to maintain	34%	12%	24%	30%
Easily found for purchase	27%	26%	24%	23%
Easily serviced	42%	13%	28%	17%
Common sight on NZ roads	15%	57%	18%	10%

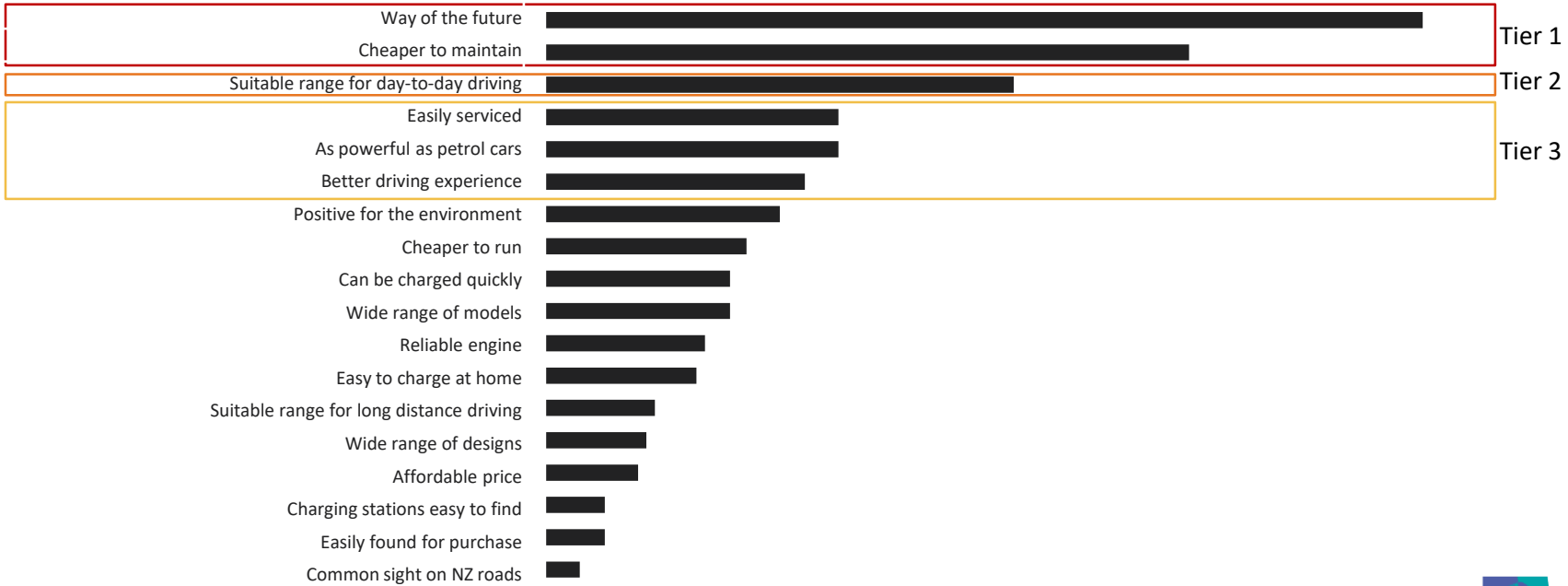
Green = significantly ↑, Red = significantly ↓ than total sample

Note: Statements ranked in order of 'Agree'

Base: Total sample (n=1000) & Obligations segment (n=231); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement

To improve their uptake, key area of focus is to improve perceptions that they are the *way of the future* and *are cheaper to maintain*

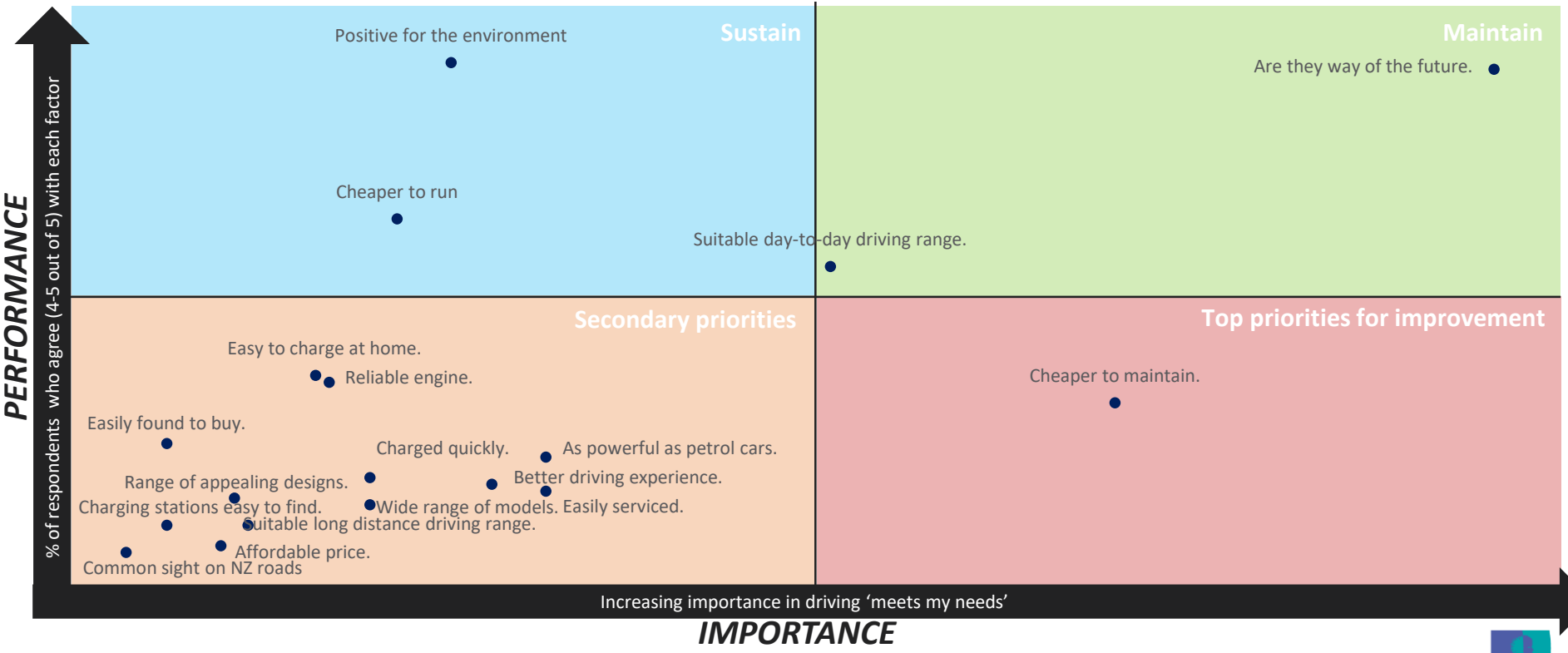
We looked at how various statements about Electric Vehicles are related to 'meeting my needs', and how they relate to all the other statements. This gives us the rank and strength.



Base: Obligations (n=231); **AET5:** Taking everything into account, please could you tell us what your general attitude to, or impression is, of each of these types of cars. Even if you've never used them, you can have an expectation of how they would meet your needs. **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles?

WHAT PERCEPTIONS SHOULD WE FOCUS ON IMPROVING?

Being *cheaper to maintain* is the key feature to focus on to improve perceptions, having a *suitable day-to-day driving range* perception can also be strengthened



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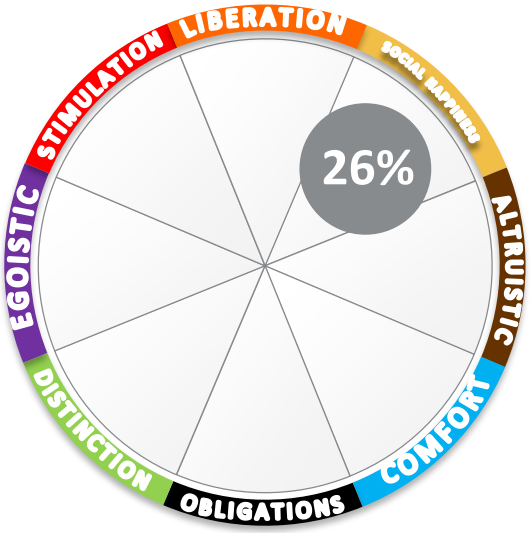
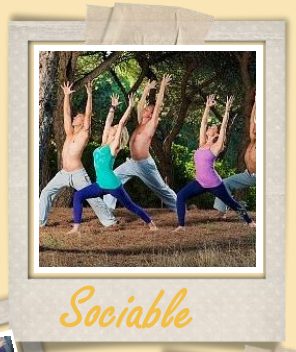
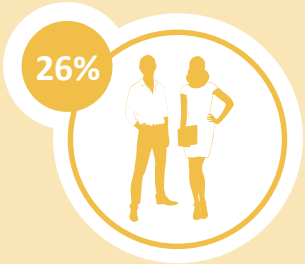
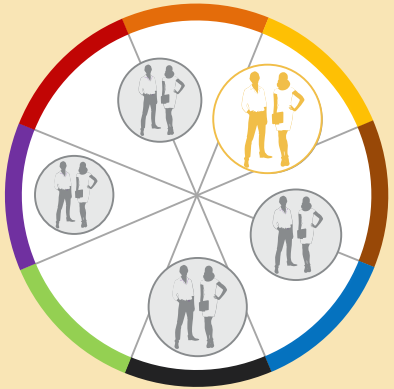
SOCIAL HAPPINESS SEGMENT



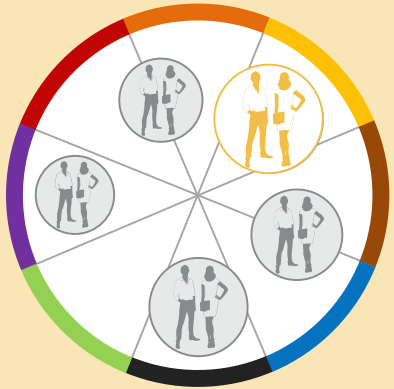
Social happiness







SOCIAL HAPPINESS



A means for sharing happiness

It's for people who are social. People are the most important thing with their lives. They have a need to feel connected with others. Enjoyment is not so much about doing things, it is about sharing experiences, moments and building memories with friends and families. Cars give them the means to connect with people who matter to them (both during the journey or as a destination).

Key motivations defining the SOCIAL HAPPINESS segment

Emotional Benefits
(How it should make me feel)

- Helps me take care of my family.
- Helps me feel connected with friends and loved-ones.
- Helps me share happy times with others.

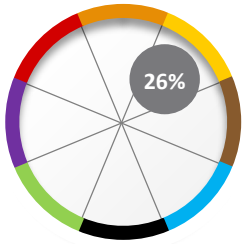
Social Identity
(What it should reflect upon me)

- People who are family-oriented.
- People who value the strong bonds of family/friends.
- People who dedicate time for friends.

Functional Characteristics
(How it should help me)

- Passenger seating (# of seats)
- Cargo capacity
- Kid friendly interior

Social happiness are more likely to be female, have a HH income under $60k and have children



37% 47% Male

63% *53%* Female

40% 37% 18-39 year-olds

43% 44% 40-64 year-olds

18% 19% 65 years and over

17% 20% Upper NI (excl. AKL)
27% 33% Auckland
26% 23% Lower NI
18% 16% Upper SI
12% 8% Lower SI

11% 9% NZ Maori
80% 78% European
2% 2% Pacific People
11% 13% Asian
2% 4% Others

86% 82%A stand-alone house
9% 9% Semi-detached house
4% 7% An apartment
1% 1% Other

42% 34% HH income <$60k

27% 26% HH income $60,001k-$100k

19% 25% HH income >$100k

12% 15% Don't know / rather not say

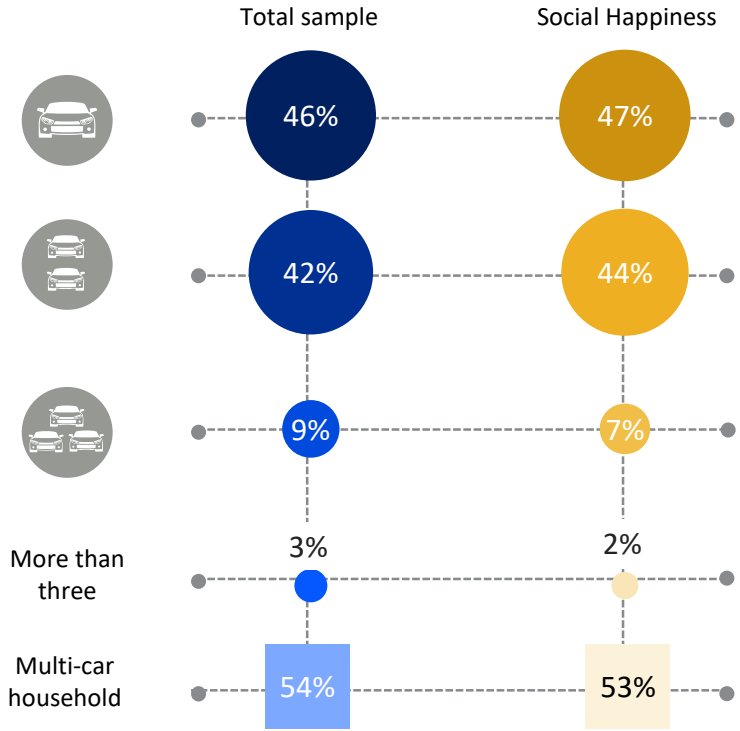
41% 61% Household no kids
56% 37% HH with kids (under 18)
58% 38% HH with kids (any age)
30% 16% HH with kids (under 5)
20% 14% HH with kids (5-13 years)
4% 8% Younger couple no kids
8% 13% Single person HH
18% 24% Older couple no kids

Green = significantly ↑, Red = significantly ↓ than total sample

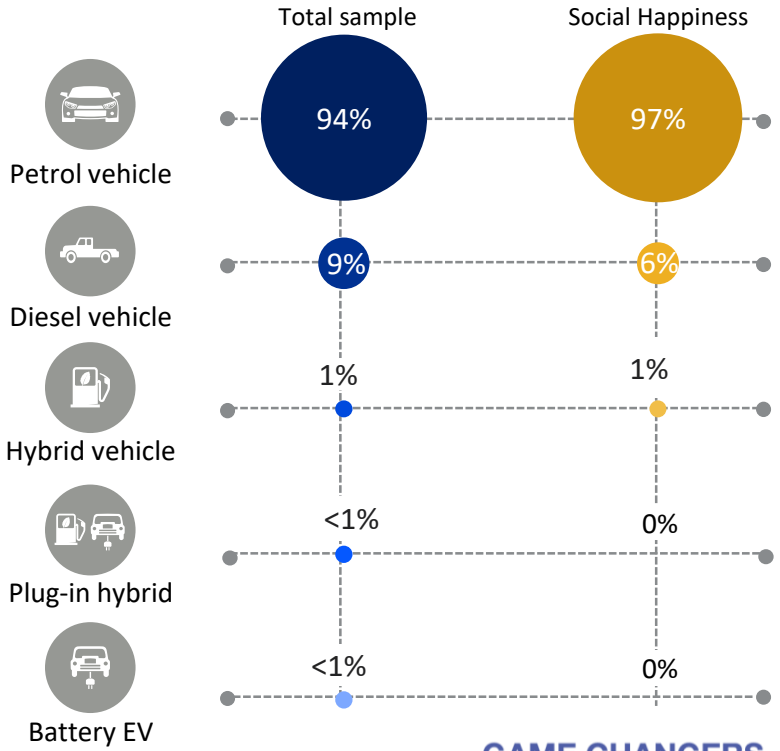
Base: Total sample (n=1000), Social Happiness (n=263) ; **QB:** Which of the following best describes your age group? ; **QC:** Which of the following best describes your gender? **Q123:** Which ethnic group or groups best describe you? ; **Q124:** Which one of the following best describes where you live? ; **Q121:** Which of the following best describes your **total household income** before tax? ; **Q122:** Which of the following best describes your household? ; **Q127:** Which of the following best describes your home?

Slightly more likely to own a petrol vehicle, with nearly half being multiple car households

Number of vehicles owned in household



Type of cars in household



Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Social Happiness (n=263) ; **C1:** How many cars do you currently own (or jointly own) within your household? ; **C3:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what type of car it is?

Social happiness are more likely to have a people carrier, purchase used cars, and spend less than 15K on their car

Body type of car(s)

Hatchback	38%	37%
Sedan	24%	32%
Minivan / people carrier	19%	9%
Station wagon	18%	14%
SUV	14%	17%
Sports car	3%	4%
Ute / pick-up truck	3%	5%
Other	2%	1%

Engine size(s) (in litres)

NETT less than 2L	48%	51%
NETT 2 - 3L range	42%	40%
NETT 3L +	10%	15%
I don't know / NA	15%	10%

How acquired vehicle(s)

I bought it - brand new	10%	19%
I bought it - used	91%	84%
It was given to me	5%	5%
I don't know / other	0%	1%

Year of manufacture(s)

NETT 2010 or later	25%	31%
NETT 2000-2009	68%	60%
NETT Pre-2000	22%	24%

Amount paid for car(s)

NETT less than 15k	88%	73%
NETT 15-30k	23%	27%
NETT 30-60k	5%	13%
NETT 60k+	0%	3%
DK / prefer not to say	2%	3%

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Base: Total sample (n=1000), Social happiness (n=263) ; **C5:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what body type it has? ; **C9:** Please tell us the car's engine size (in litres)? ; **C7:** Please tell us what year the car was manufactured? ; **C6a:** How did you take ownership of it? ; **C8:** How much did you pay for your car?

Social happiness were less likely to use their main car for work and more likely to use it for carrying friends or family

Main differences in usage
(the car you use most often)

Work
52%
(59%)

Carrying friends or family
65%
(56%)

Main differences in usage
(secondary cars)

No significant differences

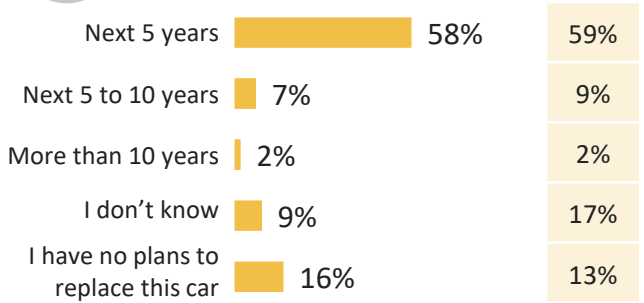
Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Social happiness (n=263); Social happiness with secondary cars (n=69), Total sample with secondary cars (n=252) ; **U1:** Please tell us what you use your car for?

More likely to replace their car to when it no longer meets their needs and would intend to spend a relatively lower amount

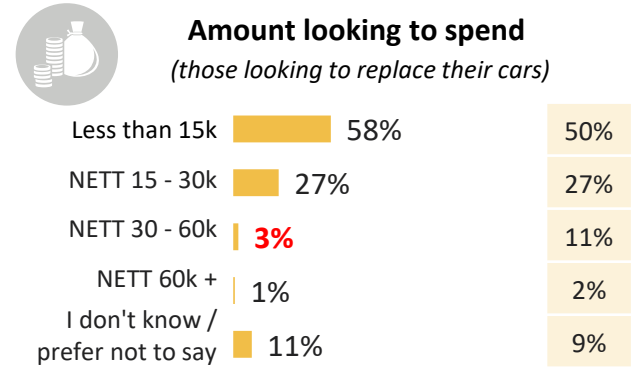
When intend to replace

(the car you use most often)



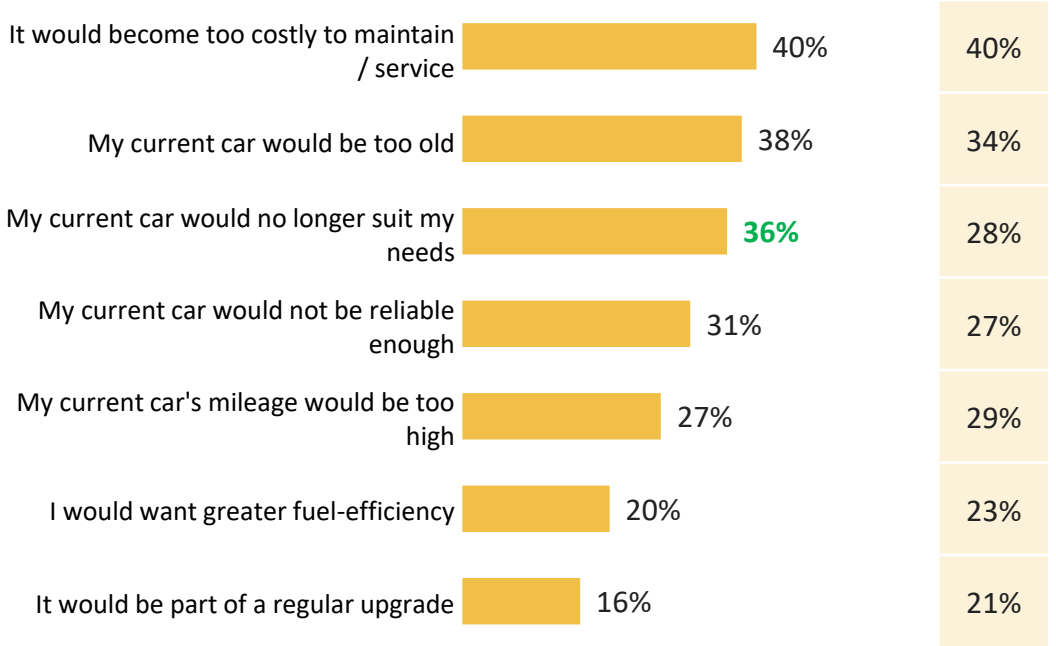
Amount looking to spend

(those looking to replace their cars)



Factors prompting you to replace car

(the car you use most often)



Note: top 10 responses of the Egoists shown in chart

Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Social happiness (n=263) ; Those looking to replace their cars total (n=870), Social happiness (n=220); **N2:** When do you intend to replace this car? ; **N5** When you replace it, how much would you be looking to spend? ; **N3:** Excluding theft and extensive damage (i.e. write-off), what factors would likely prompt you to replace your car?

More likely to use *social resources*; less likely to use *manufacturer websites*, *motoring publications* & *attend car shows*

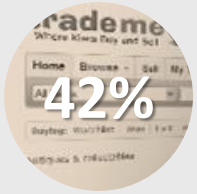
Top 5 Important sources of information in **choosing which car to buy**

68%
Going online

59%
See cars in-person

54%
Visit a dealership

43%
Discuss with family and friends



38%
Online – Trade Me

Main differences

(next car)

15%
23%
Car manufacturer websites

7%
14%
Motoring publications

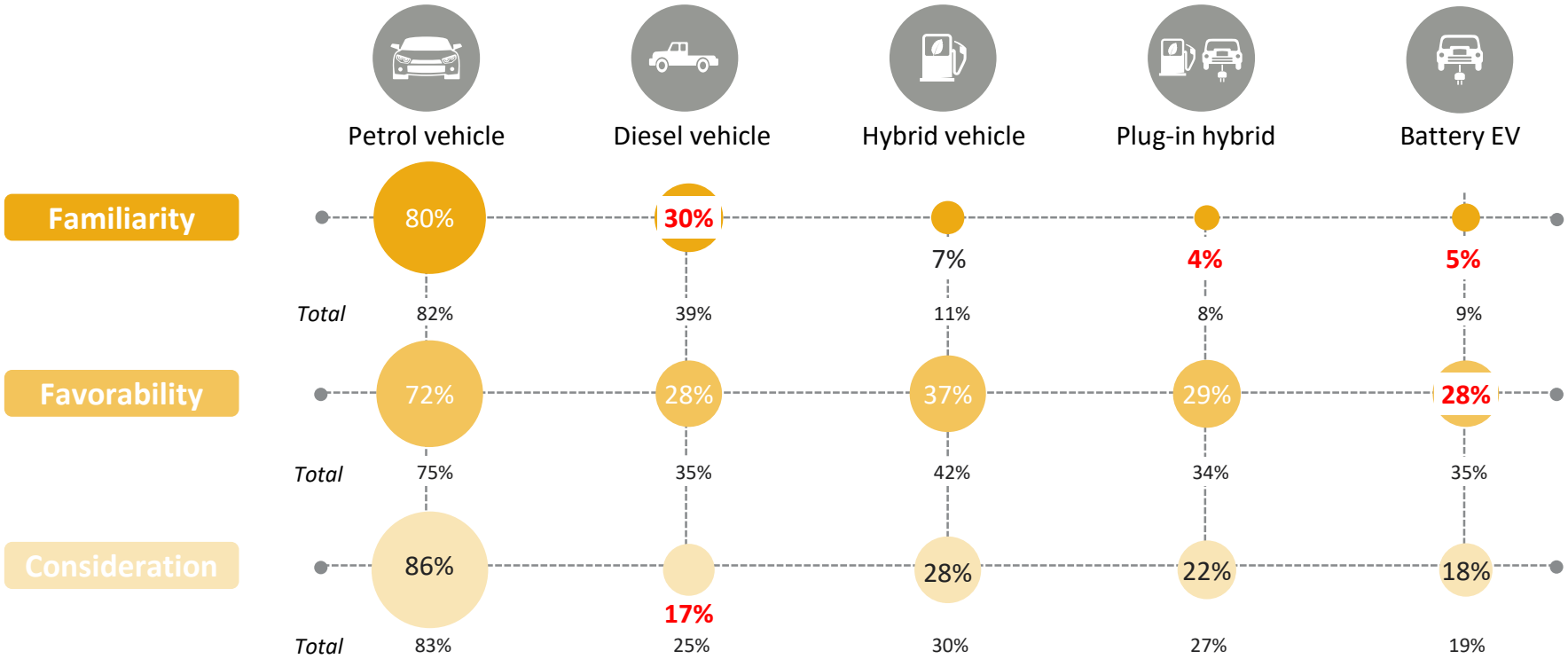
1%
3%
Attend a car show

Green = significantly ↑, Red = significantly ↓ than total sample

Note: top 5 responses of the Egoists shown in chart

Base: Total sample (n=1000), Social happiness (n=263); **N6:** If you had to replace your car tomorrow, what would be your most important sources of information in choosing which car to buy?;

Lower *familiarity* towards diesel, PHEV and BEV; potentially contributing to lower *favorability* for BEVs and lower *consideration* towards diesel vehicles



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Note: Familiarity, favorability and consideration figures are top two box percentages

Base: Total sample (n=1000), Social happiness (n=236) ; **AET1:** How would you rate your familiarity with the following types of cars? ; **AET2:** How favourable or unfavourable is your overall opinion or impression of the following types of cars? **; N4:** 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?

Generally on par with the total sample on strength of barriers, with *affordability* & *lack of knowledge / certainty* towards BEVs the most common barriers

How the benefits of Electric Vehicles currently compare with barriers

Top 3 Barriers

44% 43% They are not available at an affordable price

38% 33% I don't know enough about them to consider them

36% 34% Uncertainty about battery life and replacement

Main differences

No significant differences

Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Social happiness (n=263); **EV10:** Below are a list of possible benefits of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest attractive features to you ; **EV11:** Below is a list of possible barriers of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest issues to you. **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? **EV15:** Thinking about the cost to run an electric vehicle compared to a similarly-sized petrol vehicle, how do you think the running costs compare?

Generally on par with the total sample on strength of benefits, *less pollution*, *saving fuel resources* & *cheaper to run* are the most widely recognised benefits

How the benefits of Electric Vehicles currently compare with barriers

Top 3 Benefits

55% 53% — Produce less pollution/ gas emissions

44% 39% — Save fuel resources

43% 43% — Cheaper to run

Main differences

No significant differences

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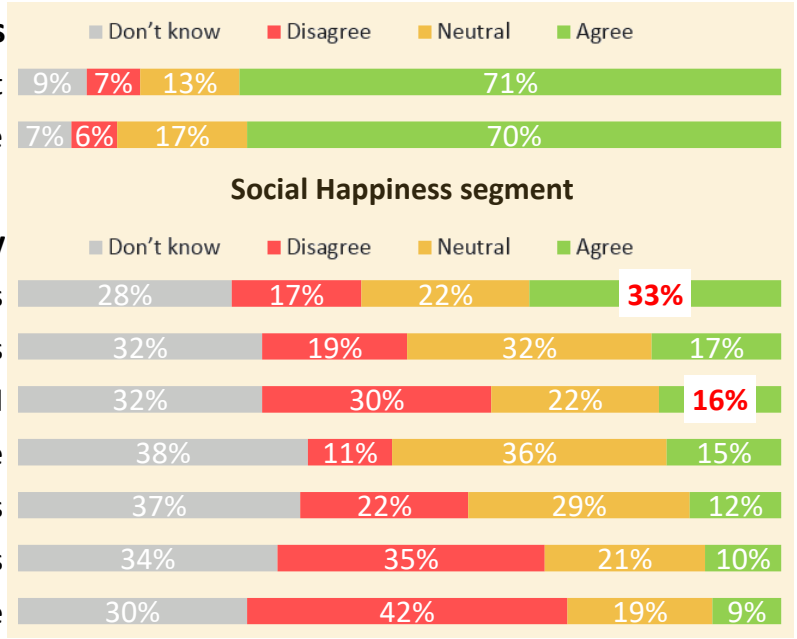
Base: Total sample (n=1000), Social happiness (n=263); **EV10:** Below are a list of possible benefits of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest attractive features to you ; **EV11:** Below is a list of possible barriers of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest issues to you. **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? **EV15:** Thinking about the cost to run an electric vehicle compared to a similarly-sized petrol vehicle, how do you think the running costs compare?

Compared with the total, Social Happiness are generally less likely to agree with the *product technology* statements

Statements about Electric Vehicles



	Don't know (total level)	Disagree (total level)	Neutral (total level)	Agree (total level)
Positive for environment	7%	6%	12%	75%
Way of the future	7%	6%	16%	71%
Day to day driving needs	24%	17%	20%	39%
Range of appealing designs	27%	24%	29%	20%
Just as powerful	27%	28%	22%	23%
Better driving experience	32%	15%	34%	19%
Wide range of models	31%	28%	26%	15%
Long distance driving needs	28%	40%	19%	13%
Affordable price	24%	47%	18%	11%

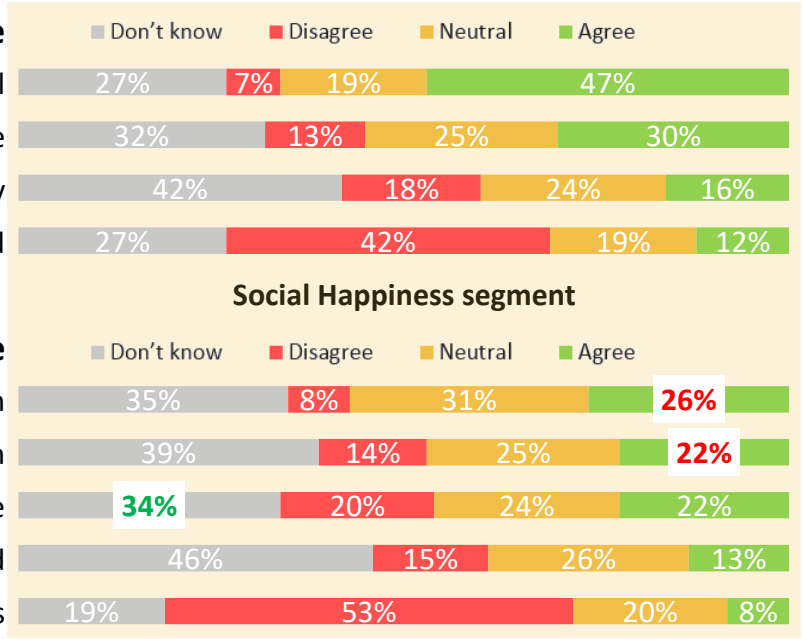
Green = significantly ↑, Red = significantly ↓ than total sample

Note: Statements ranked in order of 'Agree'

Base: Total sample (n=1000) & Social Happiness segment (n=263); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement

Compared with the total, Social Happiness are also generally less likely to agree with the *infrastructure* statements

Statements about Electric Vehicles (cont.)



	Don't know (total level)	Disagree (total level)	Neutral (total level)	Agree (total level)
Complementary infrastructure				
Cheaper to run than petrol	22%	8%	19%	51%
Easy to charge at home	33%	11%	24%	32%
Charged quickly	37%	18%	25%	20%
Public charging easy to find	23%	45%	18%	14%
Downstream infrastructure				
Reliable engine tech	31%	9%	28%	32%
Cheaper to maintain	34%	12%	24%	30%
Easily found for purchase	27%	26%	24%	23%
Easily serviced	42%	13%	28%	17%
Common sight on NZ roads	15%	57%	18%	10%

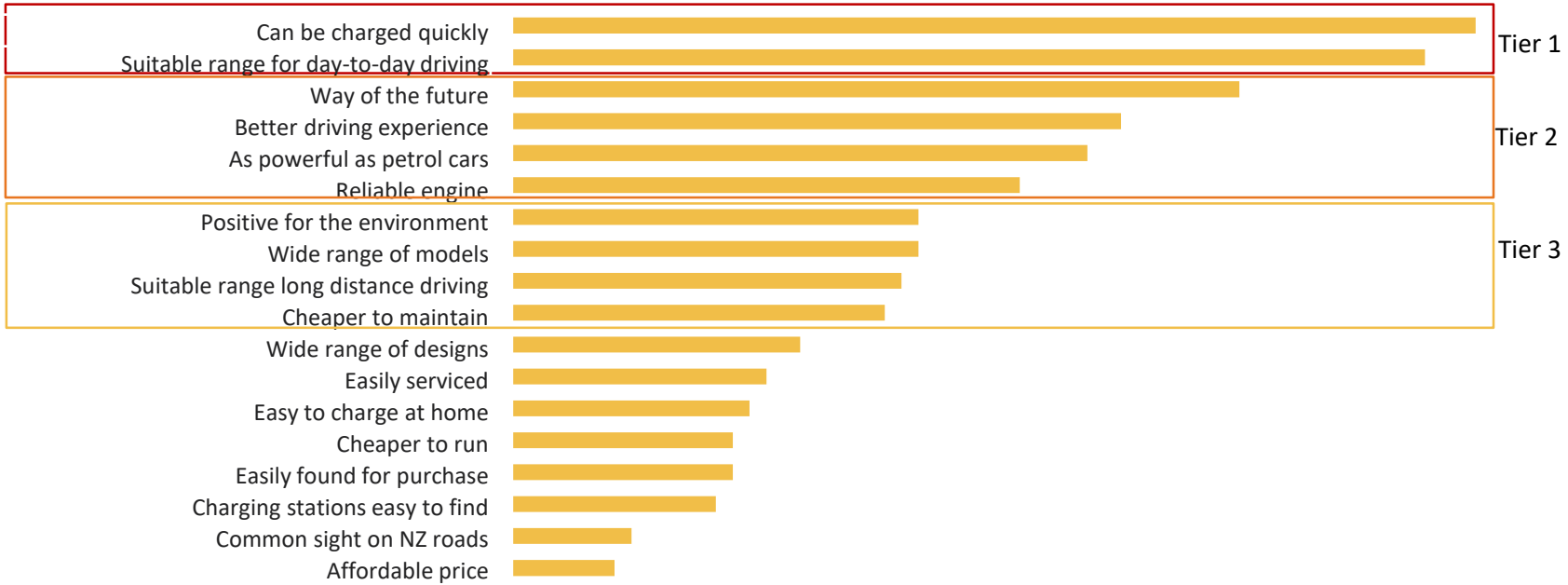
Green = significantly ↑, Red = significantly ↓ than total sample

Note: Statements ranked in order of 'Agree'

Base: Total sample (n=1000) & Social Happiness segment (n=263); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement

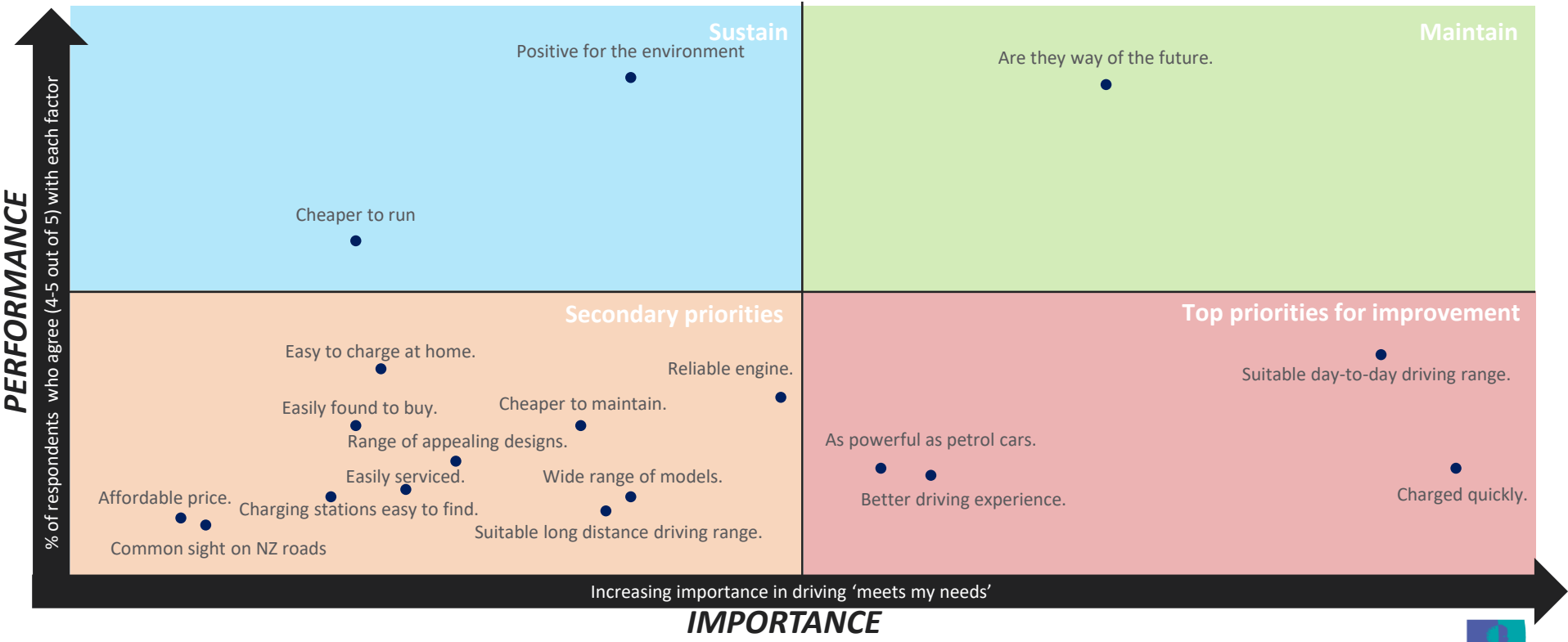
To improve their uptake, key area of focus is to improve perception they can be *charged quickly* and have a *suitable range for day-to-day driving*

We looked at how various statements about Electric Vehicles are related to 'meeting my needs', and how they relate to all the other statements. This gives us the rank and strength.



Base: Social Happiness (n=263); **AET5:** Taking everything into account, please could you tell us what your general attitude to, or impression is, of each of these types of cars. Even if you've never used them, you can have an expectation of how they would meet your needs. **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles?

Features such as *can be charged quickly*, *suitable day-to-day driving range* & providing a *better driving experience* are top priorities to improve perceptions



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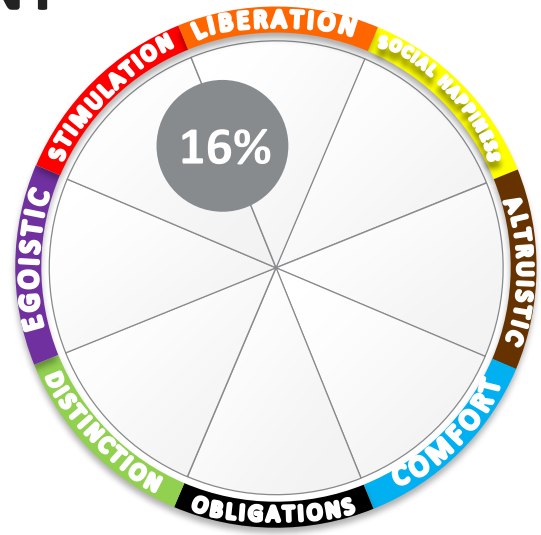
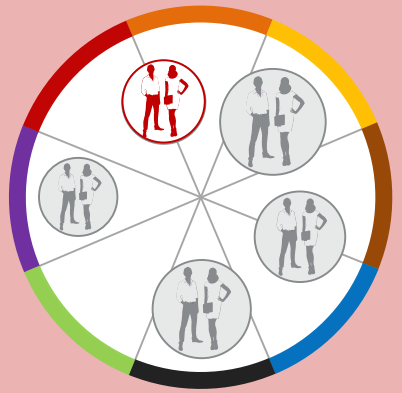
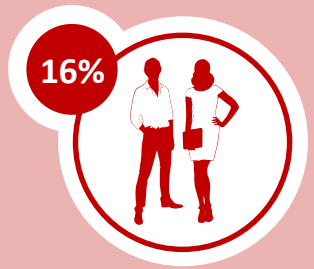
STIMULATION LIBERATION SEGMENT

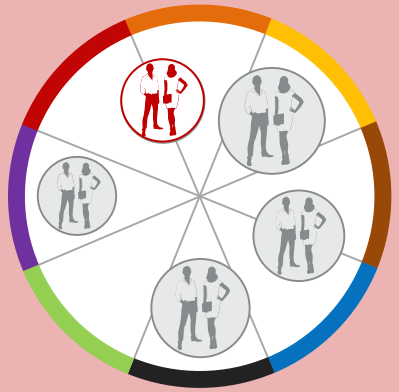


Stimulation Liberation



STIMULATION LIBERATION





Pushes my boundaries and gives me freedom

It's for people who tend have a positive view of life, and have a keen sense of adventure and get a thrill out of pushing their boundaries. Having fun and taking a break from the mundane is an important to them, which invariably means enjoying the outdoors. Having a car gives them the freedom to live their lives to the fullest, supporting their need for adventure.

Key motivations defining the STIMULATION LIBERATION segment

Emotional Benefits
(How it should make me feel)

- Allows me to have fun while driving.
- Makes me feel happy.
- Supports me on my outdoor adventures.

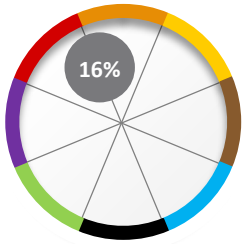
Social Identity
(What it should reflect upon me)

- People who get a thrill from driving.
- People who are always fun to be around.
- People who live for outdoor adventures.

Functional Characteristics
(How it should help me)

- Powerful engine
- Technology that enhances journey satisfaction / enjoyment (Bluetooth, stereo, touchscreen, maps)
- Towing bar / Roof racks

Stimulation Liberation are more likely to be male, have no kids and live out of Auckland



59%	47%	Male
41%	*53%*	Female

37%	37%	18-39 year-olds
49%	44%	40-64 year-olds
14%	19%	65 years and over

22%	20%	Upper NI (excl. AKL)
23%	33%	Auckland
25%	23%	Lower NI
24%	16%	Upper SI
6%	8%	Lower SI

8%	9%	NZ Maori
86%	78%	European
2%	2%	Pacific People
8%	13%	Asian
3%	4%	Others

84%	82%	A stand-alone house
6%	9%	Semi-detached house
7%	7%	An apartment
4%	1%	Other

33%	34%	HH income <$60k
26%	26%	HH income $60,001k-$100k
25%	25%	HH income >$100k
15%	15%	Don't know / rather not say

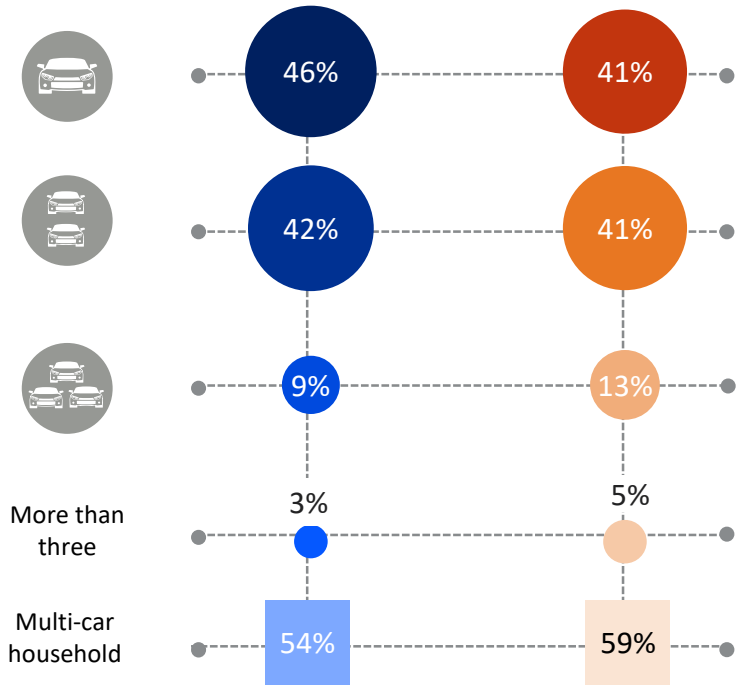
74%	61%	Household no kids
23%	37%	HH with kids (under 18)
23%	38%	HH with kids (any age)
18%	13%	Single person HH
27%	24%	Older couple no kids

Green = significantly ↑ , Red = significantly ↓ than total sample

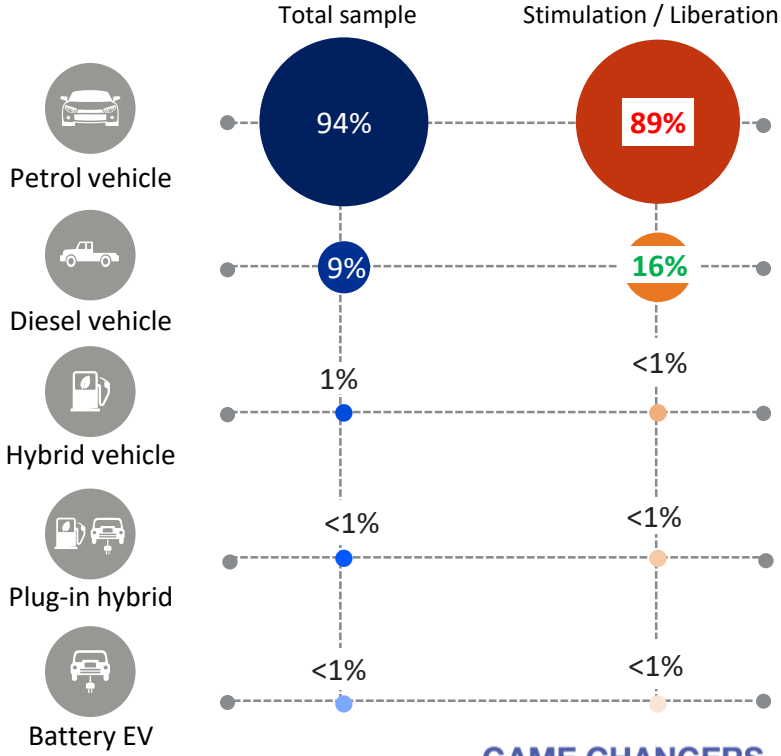
Base: Total sample (n=1000) Stimulation / Liberation (n=159) ; **QB:** Which of the following best describes your age group? ; **QC:** Which of the following best describes your gender? **Q123:** Which ethnic group or groups best describe you? ; **Q124:** Which one of the following best describes where you live? ; **Q121:** Which of the following best describes your **total household income** before tax? ; **Q122:** Which of the following best describes your household? ; **Q127:** Which of the following best describes your home?

Stimulation Liberation are more likely to own a diesel vehicle and less likely to own a petrol car

Number of vehicles owned in household



Type of cars in household

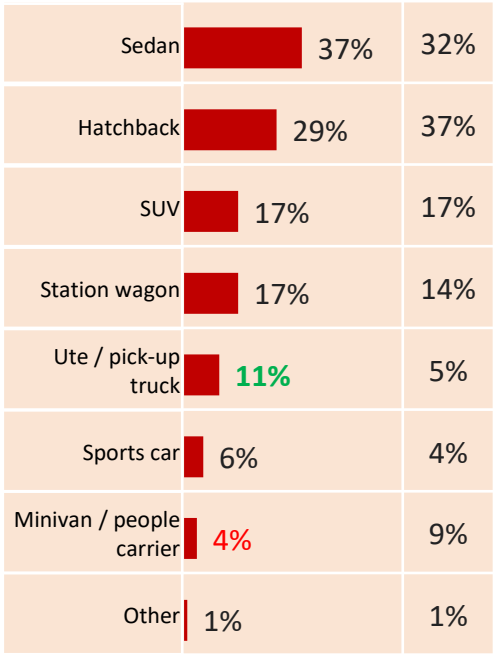


Green = significantly ↑, Red = significantly ↓ than total sample

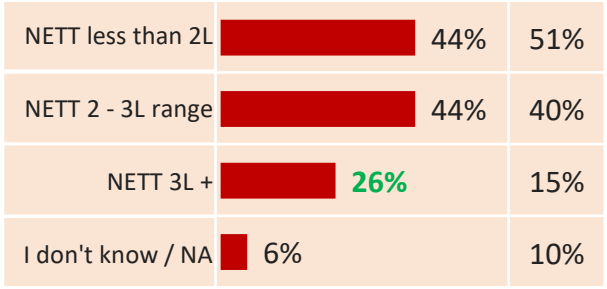
Base: Total sample (n=1000), Stimulation / Liberation (n=159) ; **C1:** How many cars do you currently own (or jointly own) within your household? ; **C3:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what type of car it is?

Larger engine sizes, Utes / pick-up truck and vehicles *manufactured prior to 2000* are more common among Stimulation Liberation

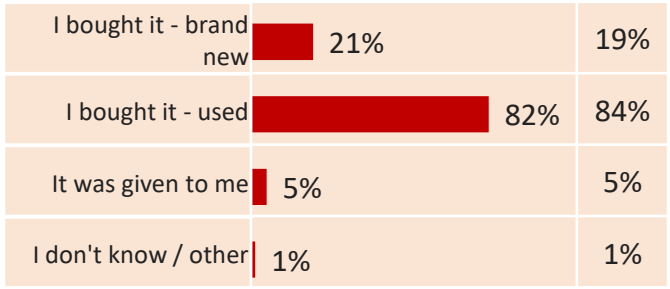
Body type of car(s)



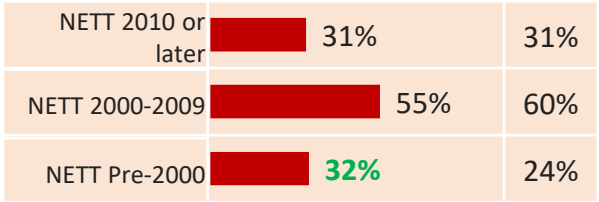
Engine size(s) (in litres)



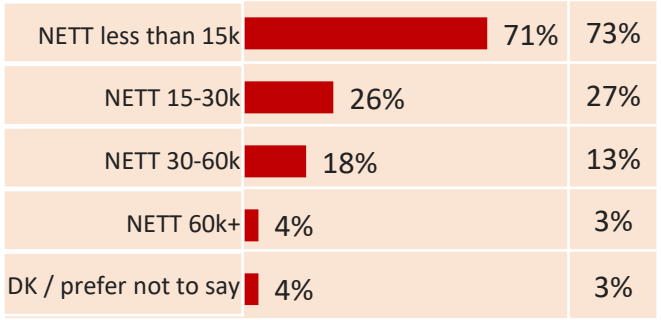
How acquired vehicle(s)



Year of manufacture(s)



Amount paid for car(s)



Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Stimulation / Liberation (n=159) ; **C5:** Thinking about the car that you own and drive regularly (i.e. at least once a week), please tell us what body type it has? ; **C9:** Please tell us the car's engine size (in litres)? ; **C7:** Please tell us what year the car was manufactured? ; **C6a:** How did you take ownership of it? ; **C8:** How much did you pay for your car?

Less likely to use their main car for *running errands* & directionally less likely to use their secondary car for *carrying friends or family*

Main differences in usage
(the car you use most often)

Running errands

69%

(77%)

Main differences in usage
(secondary cars)

Carrying friends or family

33%

(44%)

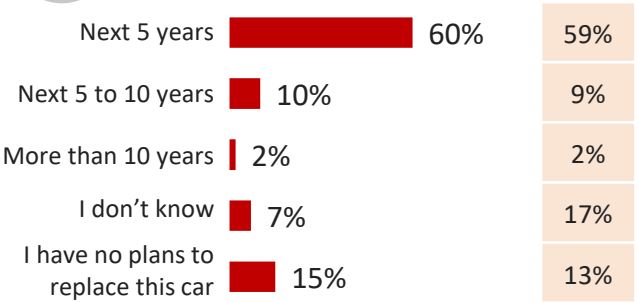
Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Stimulation / Liberation (n=159); Stimulation / Liberation with secondary cars (n=47), Total sample with secondary cars (n=252) ; **U1:** Please tell us what you use your car for?

Treat / reward myself is more likely a prompt to replace their vehicle while *car safety* is cited less often

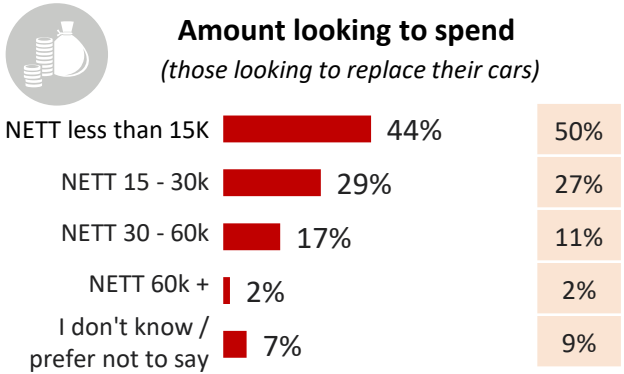
When intend to replace

(the car you use most often)



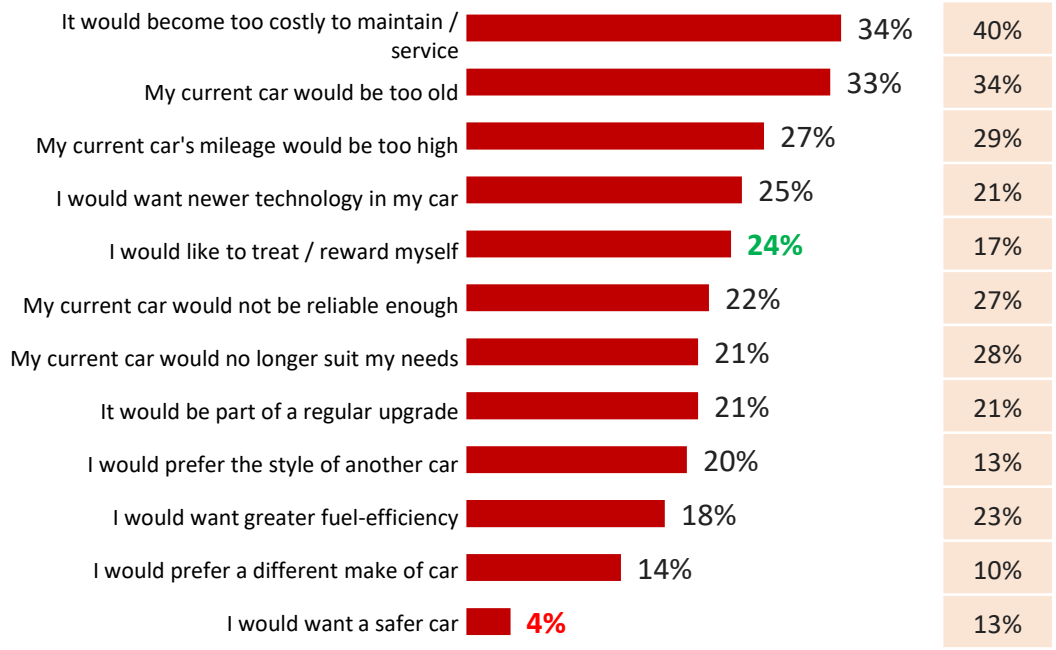
Amount looking to spend

(those looking to replace their cars)



Factors prompting you to replace car

(the car you use most often)



Note: top 12 responses of the Stimulation / Liberation shown in chart

Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Stimulation / liberation (n=159) ; Those looking to replace their cars total (n=870), Stimulation / liberation (n=135); **N2:** When do you intend to replace this car? ; **N5** When you replace it, how much would you be looking to spend? ; **N3:** Excluding theft and extensive damage (i.e. write-off), what factors would likely prompt you to replace your car?

Stimulation Liberation use a combination of *online* & *in person* information sources

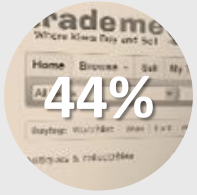
Top 5 Important sources of information in **choosing which car to buy**

68%
Going online

59%
See cars in-person

54%
Visit a dealership

39%
My own knowledge /experience



38%
Online - Trade Me

Main differences
(next car)

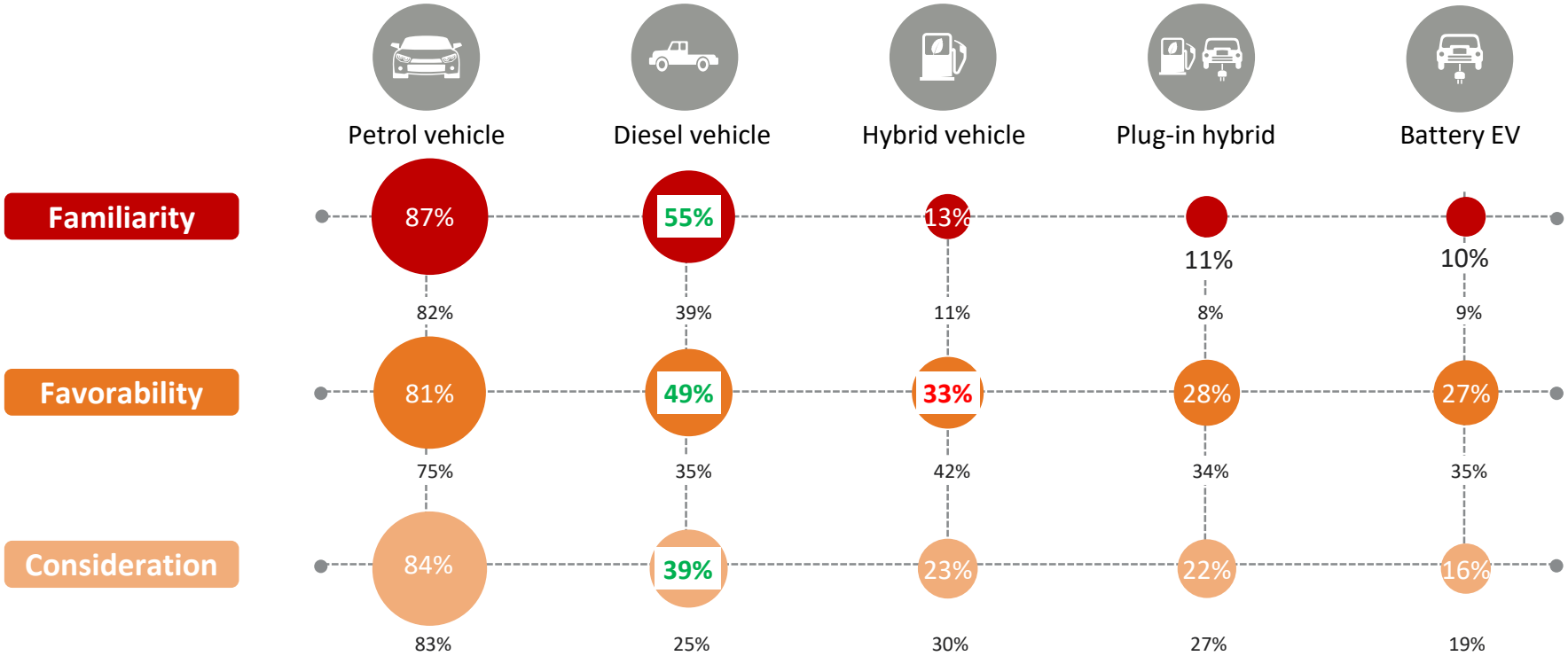
No significant differences

Green = significantly ↑, Red = significantly ↓ than total sample

Note: top 5 responses of the Stimulation / Liberation shown in chart

Base: Total sample (n=1000), Stimulation / Liberation (n=159); **N6:** If you had to replace your car tomorrow, what would be your most important sources of information in choosing which car to buy?;

Stimulation Liberation has higher *familiarity*, *favorability* & *consideration* towards diesel vehicles, while all three dimensions are lower for hybrids, PHEVs and BEVs



Green = significantly ↑, Red = significantly ↓ than total sample

Note: Familiarity, favorability and consideration figures are top two box percentages

Base: Total sample (n=1000), Stimulation / Liberation (n=159) ; **AET1:** How would you rate your familiarity with the following types of cars? ; **AET2:** How favourable or unfavourable is your overall opinion or impression of the following types of cars? **; N4:** 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?

Generally on par with the total sample on strength of barriers, *affordability* is less of a concern, while *battery life* and *long range distance* are key barriers

Stimulation / Liberation
Total sample

How the benefits of Electric Vehicles currently compare with barriers

Top 3 Barriers

39% 34% — Uncertainty about battery life and replacement

34% 43% — They are not available at an affordable price

31% 26% — They have a driving range that is not suitable for long distance travelling

Main differences

Are not an affordable price	**34%**	43%
Driving range not suitable for day-to-day needs	**14%**	9%

Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Stimulation / Liberation (n=159); **EV10:** Below are a list of possible benefits of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest attractive features to you ; **EV11:** Below is a list of possible barriers of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest issues to you. **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? **EV15:** Thinking about the cost to run an electric vehicle compared to a similarly-sized petrol vehicle, how do you think the running costs compare?

Generally on par with the total sample on strength of benefits, *reduced pollution*, *financial savings* and *less fuel resources* are top three benefits cited

How the benefits of Electric Vehicles currently compare with barriers

Stimulation / Liberation
Total sample

Top 3 Benefits

51% 53% — Produce less pollution / gas emissions

37% 43% — Cheaper to run

37% 39% — Save fuel resources

Main differences

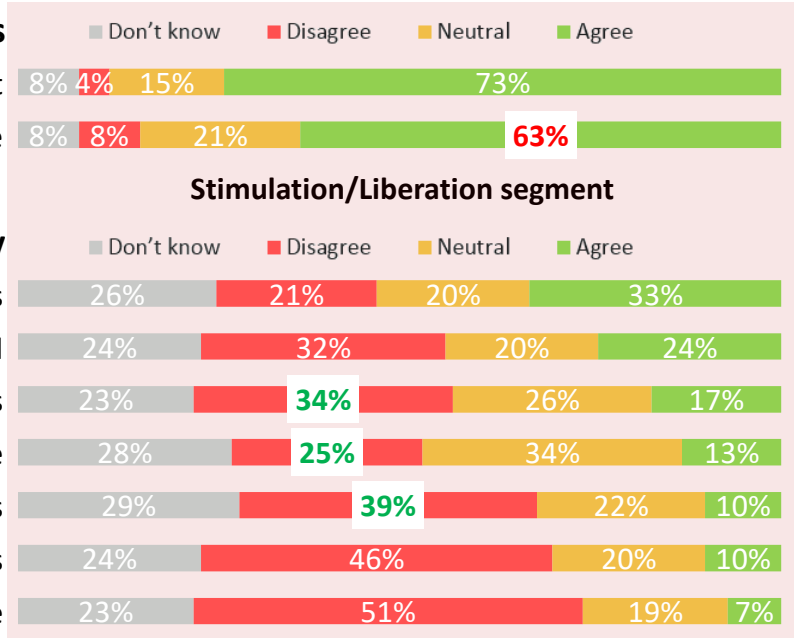
No significant differences

Green = significantly ↑, Red = significantly ↓ than total sample

Base: Total sample (n=1000), Stimulation / Liberation (n=159); **EV10:** Below are a list of possible benefits of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest attractive features to you ; **EV11:** Below is a list of possible barriers of owning and driving an electric vehicle. Please select up to three options that you feel are the biggest issues to you. **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? **EV15:** Thinking about the cost to run an electric vehicle compared to a similarly-sized petrol vehicle, how do you think the running costs compare?

Stimulation Liberation generally disagree more with the *product technology* statements compared with the total average

Statements about Electric Vehicles



	Don't know (total level)	Disagree (total level)	Neutral (total level)	Agree (total level)
Positive for environment	7%	6%	12%	75%
Way of the future	7%	6%	16%	71%
Day to day driving needs	24%	17%	20%	39%
Just as powerful	27%	28%	22%	23%
Range of appealing designs	27%	24%	29%	20%
Better driving experience	32%	15%	34%	19%
Wide range of models	31%	28%	26%	15%
Long distance driving needs	28%	40%	19%	13%
Affordable price	24%	47%	18%	11%

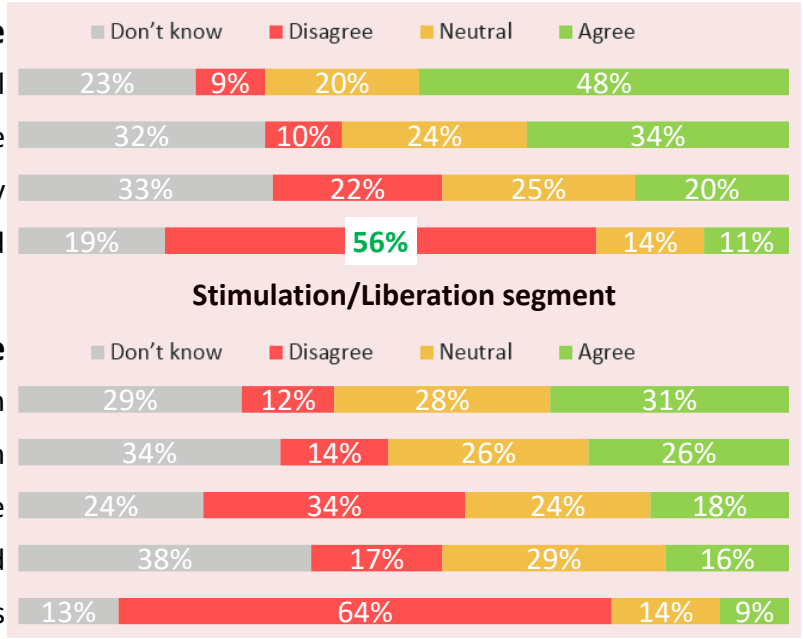
Green = significantly ↑, Red = significantly ↓ than total sample

Note: Statements ranked in order of 'Agree'

Base: Total sample (n=1000) & Stimulation/Liberation segment (n=159); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement

Although agreement with the *infrastructure* statements were broadly in line with the total, this segment are more likely to disagree with *easy-to-find charging*

Statements about Electric Vehicles (cont.)



	Don't know	Disagree	Neutral	Agree	Don't know (total level)	Disagree (total level)	Neutral (total level)	Agree (total level)
Complementary infrastructure								
Cheaper to run than petrol	23%	9%	20%	48%	22%	8%	19%	51%
Easy to charge at home	32%	10%	24%	34%	33%	11%	24%	32%
Charged quickly	33%	22%	25%	20%	37%	18%	25%	20%
Public charging easy to find	19%	56%	14%	11%	23%	45%	18%	14%
Downstream infrastructure								
Reliable engine tech	29%	12%	28%	31%	31%	9%	28%	32%
Cheaper to maintain	34%	14%	26%	26%	34%	12%	24%	30%
Easily found for purchase	24%	34%	24%	18%	27%	26%	24%	23%
Easily serviced	38%	17%	29%	16%	42%	13%	28%	17%
Common sight on NZ roads	13%	64%	14%	9%	15%	57%	18%	10%

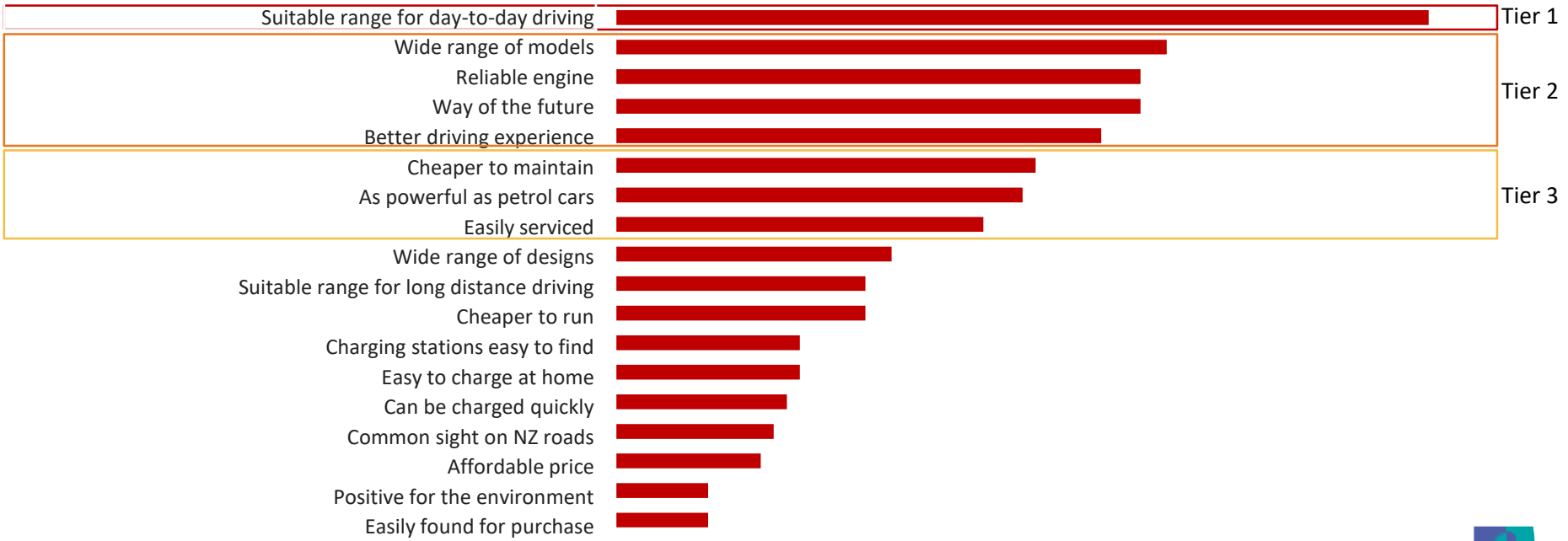
Green = significantly ↑, Red = significantly ↓ than total sample

Note: Statements ranked in order of 'Agree'

Base: Total sample (n=1000) & Stimulation/Liberation segment (n=159); **EV6:** For each of the following statements please select the answer that best describes how you feel about Electric Vehicles? Please select one answer per statement

To improve their uptake, key area of focus is to improve perceptions that they *have a suitable range for day-to-day driving*

We looked at how various statements about Electric Vehicles are related to 'meeting my needs', and how they relate to all the other statements. This gives us the rank and strength.



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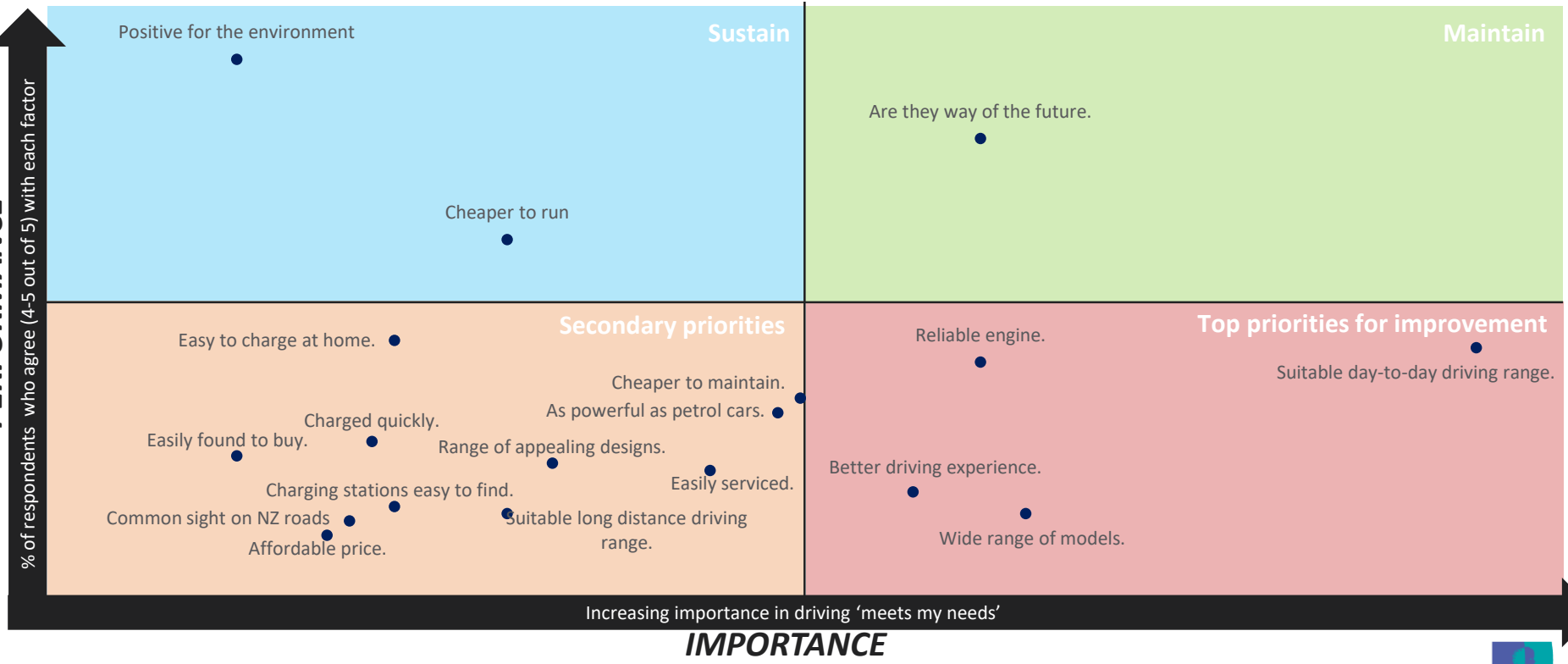
WHAT PERCEPTIONS SHOULD WE FOCUS ON IMPROVING?

Features such as *driving range*, *reliability*, *range of models* and being a *better driving experience* are top priorities to improve perceptions



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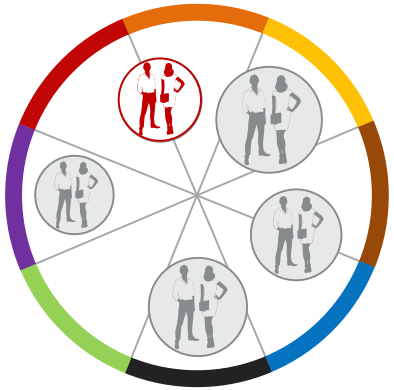
Stimulation Liberation



What are two things I've learnt about this segment?	What does this mean for promoting EVs?
• Male / no kids. • Technology fans. • Care for the environment. • Large / powerful cars. • Like to take risks.	

Contacts

Information withheld under section 9(2)(a)

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GAME CHANGERS

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Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“GAME CHANGERS” - our tagline - summarises our ambition.

GAME CHANGERS

SEPTEMBER 2018

EECA Lighting Attitudes

PREPARED FOR: EECA

PREPARED BY: IPSOS

CONTACT: INFORMATION WITHHELD UNDER SECTION 9(2)(A)

GAME CHANGERS

Table of Contents

EXECUTIVE SUMMARY

- **Energy-efficient lighting options (CFL and LED) have higher stated penetration rates in NZ homes compared to incandescent light bulbs.**
- **People are prepared to pay between $5 and $6.50 for an average-strength LED light bulb.**
- **Overall, the majority of people would be unconcerned if incandescent light bulbs were no longer available and just under a fifth believe that it would present an issue for them.**
  - **People with lower incomes tend to be less positive about this potential change and people living in older homes (pre-1950) are more likely to say they will face difficulties.**
  - **If LED light bulbs were discontinued, the majority would be concerned and 39% say it would present issues for them.**
- ***Cost / price* is the main factor cited by those who say they will face difficulties if incandescent bulbs were discontinued.**
- **Encouragingly, if incandescent bulbs were discontinued, LED bulbs would be the majority's next choice.**
  - **If LED bulbs were discontinued, CFLs would be the majority's next choice, indicating that efficient lighting is the social norm amongst New Zealanders.**

RESEARCH OBJECTIVES AND METHODOLOGY

RESEARCH OBJECTIVES AND METHODOLOGY

Why and how we're conducting this research

RESEARCH BACKGROUND AND OBJECTIVES

- In December 2017, Ipsos completed an update on consumer understanding and attitudes to lighting (EECA Energy Efficiency Lighting Update). Since that research was completed, EECA has started initial work on potential lighting project and has a small number of follow-up questions to that research.
- This research examines the following:
  - How much would people be prepared to pay for a LED light bulb?
  - How would people feel if incandescent light bulbs were no longer available in supermarkets and hardware stores?
  - What practical difficulties, if any, would this cause?
  - What types of light bulbs would people switch to?
  - Would people just not replace bulbs?
  - How would they feel – angry, neutral, positive?

RESEARCH METHODOLOGY

- A online survey of 1,003 people who are responsible for the purchase of light bulbs accessed via an online sample.
- Interviews were completed from 30th August to 3rd September 2018 with an average interview duration of 8 minutes.
- The margin of error on a sample size of 1,003 is ±3.09%. For the NZ population the figure used is 4,901,507 from the Statistics NZ estimate as at 5th September 2018.

SAMPLE PROFILE

We interviewed the following people…

(n=1,003)
respondents

7.9 minutes
average duration

48% Male

52% Female

21% 18-29 years

35% 30-49 years

25% 50-64 years

19% 65+ years

Ethnic group

71% NZ European
9% Other European
6% NZ Maori
6% Other Asian
5% Chinese
4% Indian
3% Pacific People
3% Others

Living arrangement

62% Homeowner
32% Renter
6% Other living arrangements

Time in current home

15% Less than 1 year
36% 1-5 years
18% 5-10 years
20% 10-20 years
11% More than 20 years

Income

36% $60,000 or less
9% $60,001 to $70,000
18% $70,001 to $100,000
9% $100,001 to $120,000
7% $120,001 to $140,000
9% $140,001 or more
12% Don't know / Refused

Household type

42% Household with children
25% Older couple, no kids at home
15% Single / one-person household
10% Younger couple without kids
7% In a flatting arrangement
1% Other

LIGHT BULB USAGE

LIGHT BULB USAGE

CFL bulbs have the highest levels of household penetration, followed by LED bulbs; incandescent bulbs have the lowest levels of consideration

	LED Bulbs	CFL Bulbs	Incandescent Bulbs	Fluorescent Tubes	Halogen Bulbs
Yes I use them	62%	66%	56%	24%	41%
No but I would consider using them	25%	16%	10%	17%	24%
No and I wouldn't consider them	3%	11%	22%	30%	16%
No and I don't know if I would consider them	7%	5%	10%	24%	15%
I don't know what this is	3%	2%	2%	5%	4%

LB1: *Using the options below, which best describes what you use in your home currently?*
Base: *Total sample (n=1,003)*

LIGHT BULB USAGE

LED light bulbs have the highest reported levels of use, followed by CFL bulbs

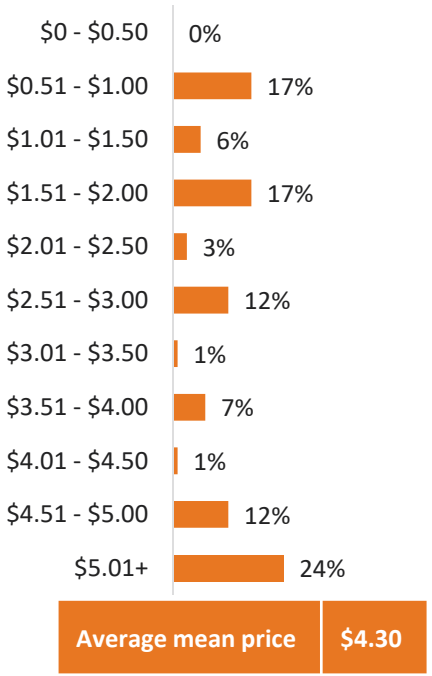
	LED Bulbs	CFL Bulbs	Incandescent Bulbs	Fluorescent Tubes	Halogen Bulbs
Virtually all of them	9%	4%	3%	0%	0%
Most of them	15%	16%	11%	1%	3%
Around half of them	9%	9%	8%	1%	3%
About a quarter of them	7%	11%	7%	1%	6%
Only a few	22%	26%	27%	21%	29%
I don't use these	38%	34%	44%	76%	59%

LB2: *And how much of the lighting in and around your home would each of the following light bulbs?*
Base: *Total sample (n=1,003)*

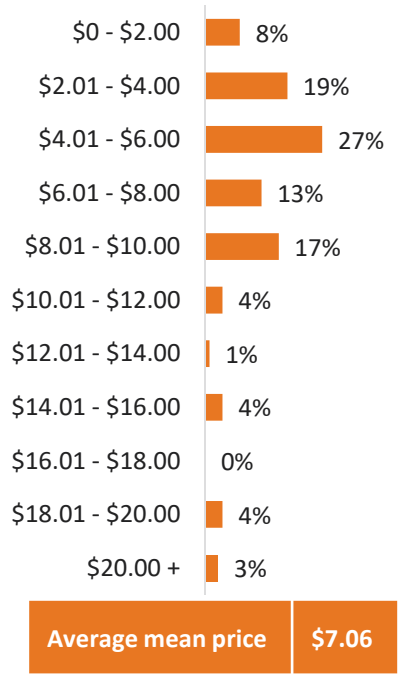
LIGHT BULB PRICING

LED bulbs are perceived as being priced at ~$7 and incandescent bulbs at ~$4; however, spread of responses indicates people are unsure about bulb pricing

Perceived pricing of incandescent light bulbs



Perceived pricing of LED light bulbs



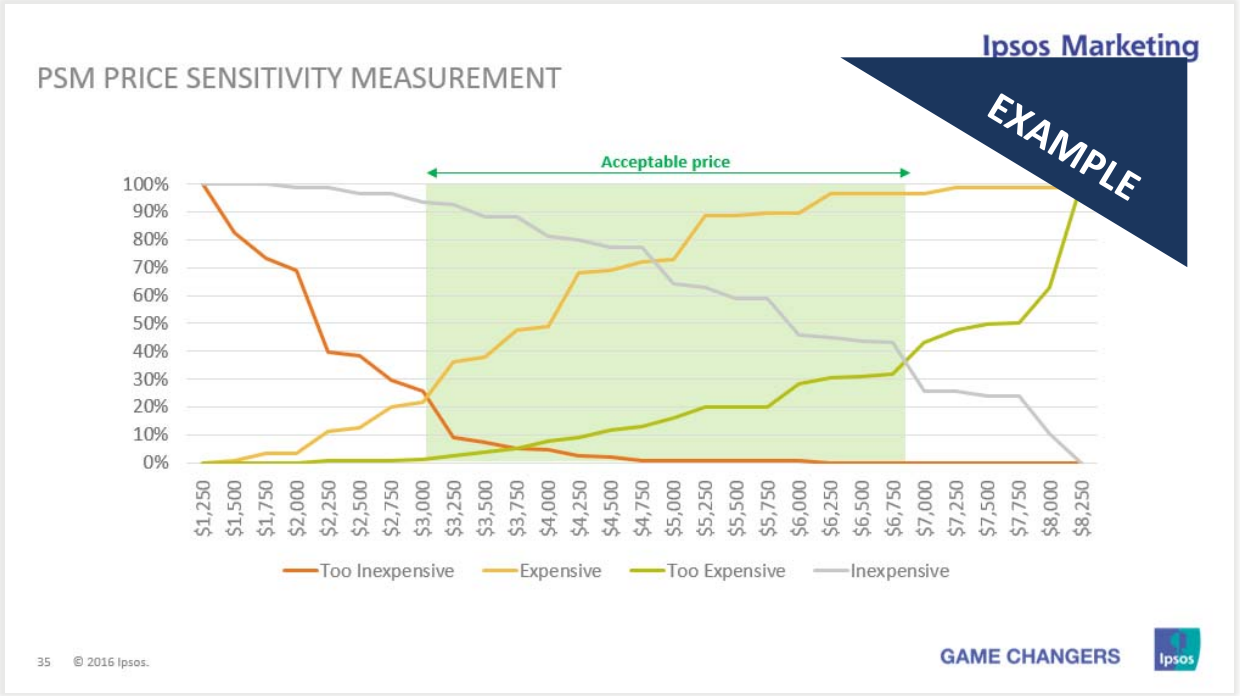
BP1a: *How much do you think the average cost is for a 60W incandescent light bulb?* / ***BP2a:*** *How much do you think the average cost is for a 60W equivalent LED light bulb?*

Base: *Total sample (n=1,003)*

LIGHT BULB PRICING

Van Westendorp's Price Sensitivity Meter (PSM)

We used the Van Westendorp pricing method to analyse the price range in which customers may buy a product or service. The optimal range of prices lies between the Point of Marginal Cheapness and the Point of Marginal Expensiveness.

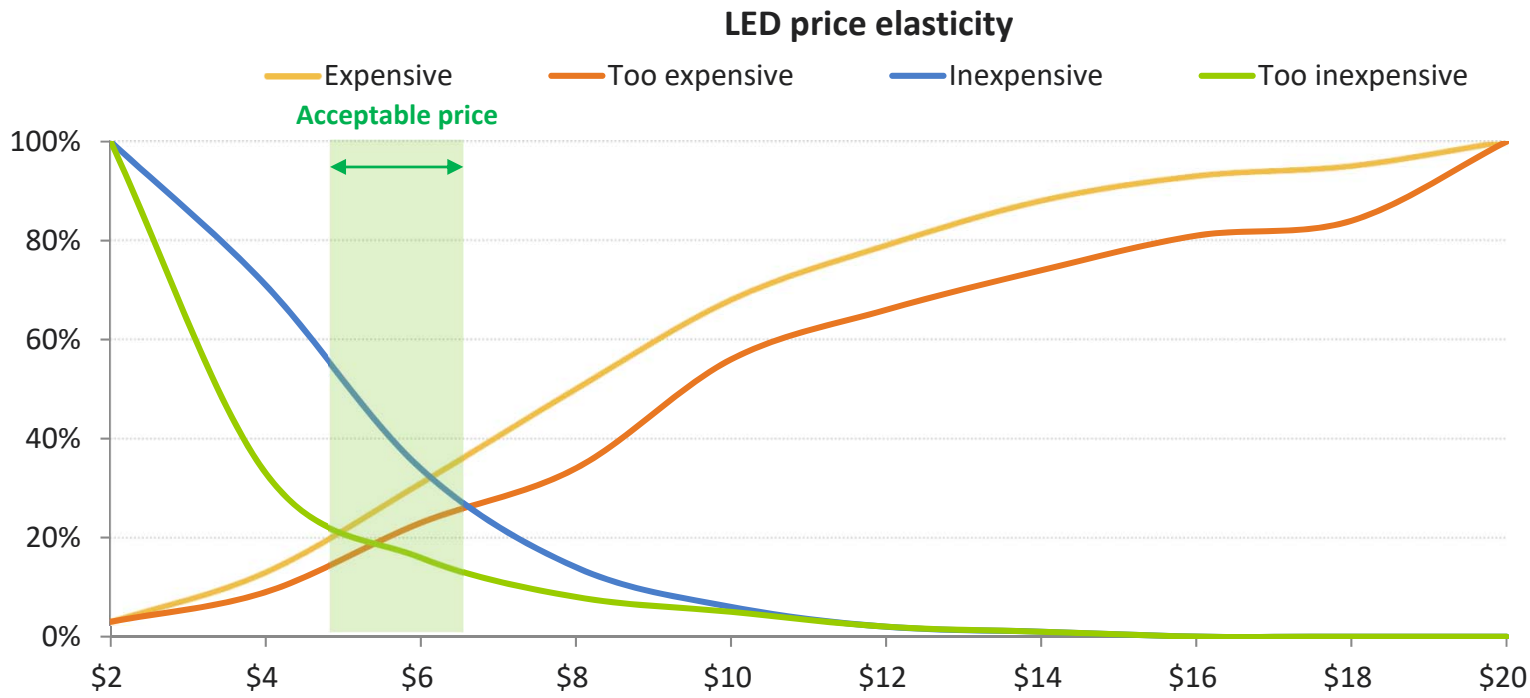


GAME CHANGERS

LIGHT BULB PRICING

Results indicate that people are prepared to pay between $5 and $6.50 for LED light bulbs

LED Bulbs



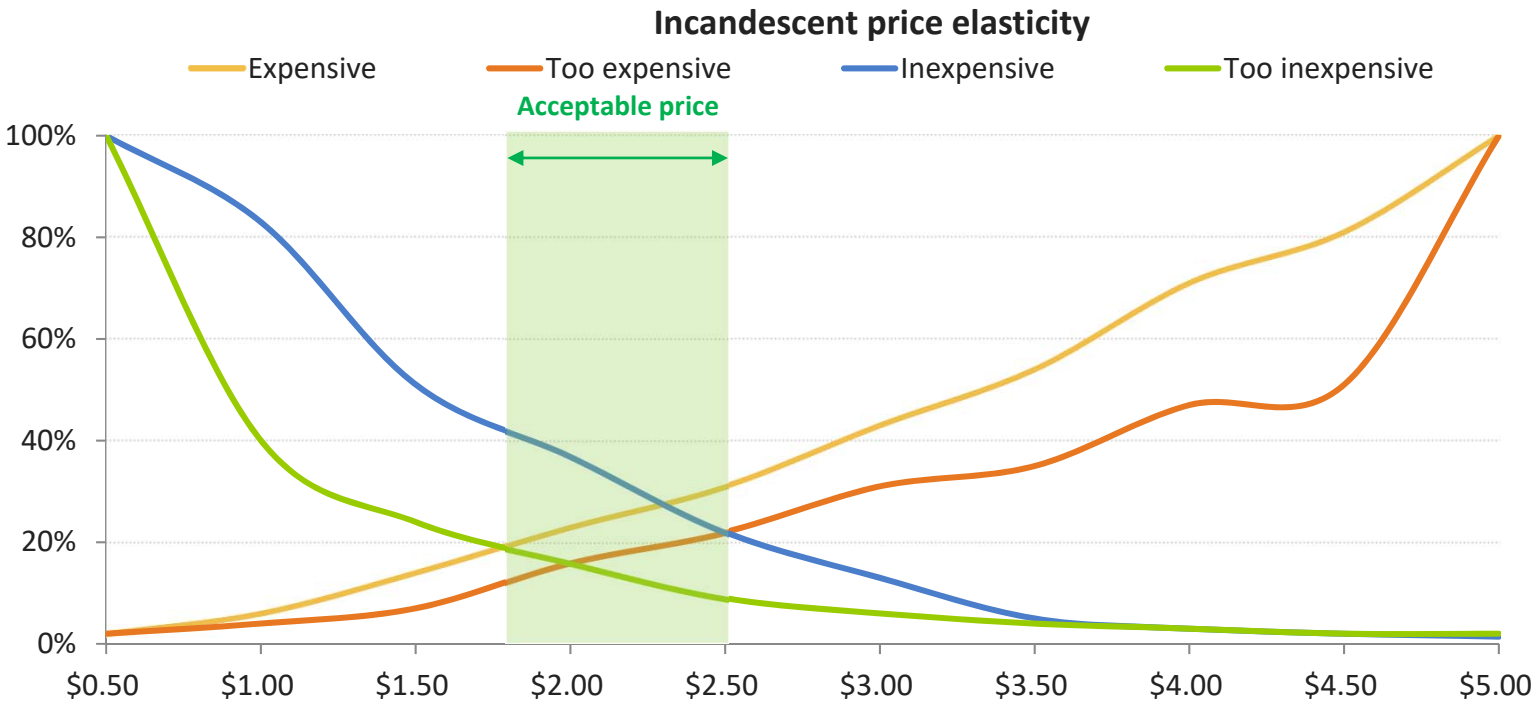
Respondents given the reference point:
A 60W Equivalent LED Light Bulb

PB2b: *At what price would you consider this product so expensive that you would never consider buying it? /* ***PB2c:*** *At what price would you consider the price of this product so low that you would question its quality? /* ***PB2d:*** *At what price would you consider the price of this product starting to get expensive – not out of the question, but you'd need to give some thought to buying it? /* ***PB2e:*** *At what price would you consider the price of this product to be a bargain – a great buy for the money?*

Base: *Total sample (n=1,003)*

LIGHT BULB PRICING

Results indicate that people are prepared to pay $1.80–$2.50 for incandescent light bulbs



Incandescent Bulbs

Respondents given the reference point:
A 60W Incandescent Light Bulb

PB2b: *At what price would you consider this product so expensive that you would never consider buying it?* / ***PB2c:*** *At what price would you consider the price of this product so low that you would question its quality?* / ***PB2d:*** *At what price would you consider the price of this product starting to get expensive – not out of the question, but you'd need to give some thought to buying it?* / ***PB2e:*** *At what price would you consider the price of this product to be a bargain – a great buy for the money?*

Base: *Total sample (n=1,003)*

GAME CHANGERS

LIGHT BULB PRICING SUMMARY

- **When it comes to estimating the pricing of light bulbs, there is a wide range of estimates, which indicates that in general most people are unsure about the cost of light bulbs, whether it be LED or incandescent.**
  - **Regardless, there is a perception that LED light bulbs are considerably more expensive than incandescent light bulbs.**
- **Van Westendorp's price sensitivity meter suggests that people are prepared to pay $5 to $6.50 for a LED light bulbs, while for incandescent bulbs people are prepared to pay far less at between $1.80 and $2.50.**
  - **There is already a willingness amongst people to pay more for LED light bulbs, implying an accepted knowledge that they cost comparatively more and have more benefits compared to incandescent light bulbs.**

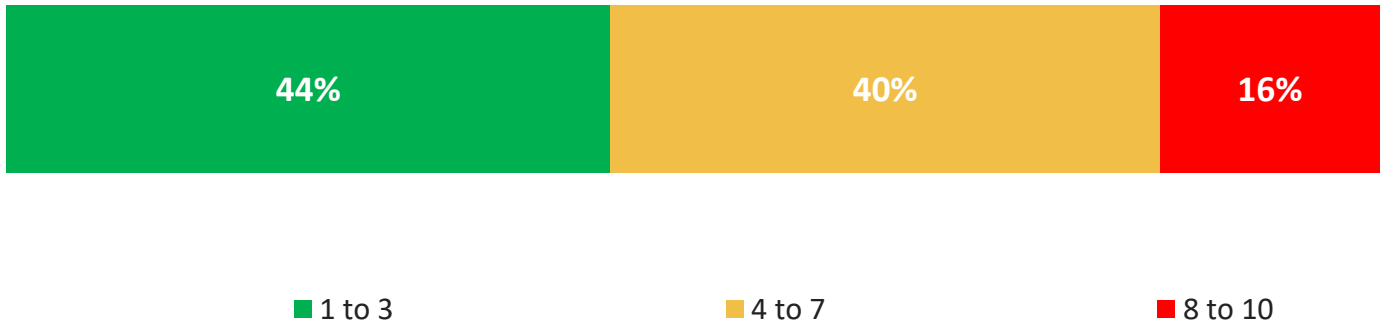
LIGHT BULB DISCONTINUATION

On average most people would not have an issue with incandescent light bulbs no longer being available

How would you feel if incandescent bulbs were no longer available?
(n=1,003)

Incandescent Bulbs

No bother at all ← → *Matter to you a lot*



Mean Score

4.3

Note: *The higher the mean score, the more negative people feel about discontinuation.*

BD1a: *On a scale from 1 to 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 incandescent light bulbs were no longer available?*

Base: *Total sample (n=1,003)*

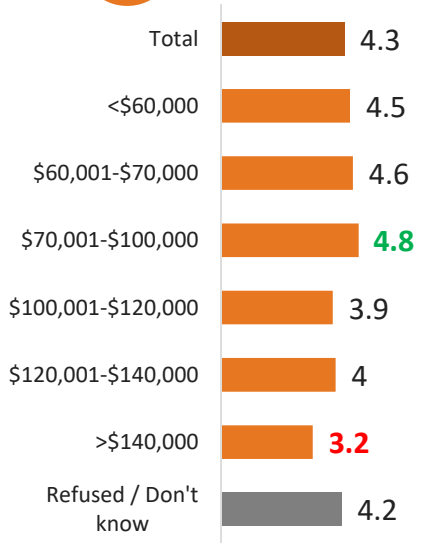
There seem to be relationships with income levels, age, home age and ownership regarding the concern over the discontinuation of incandescent light bulbs

How would you feel if incandescent bulbs were no longer available? (Mean)

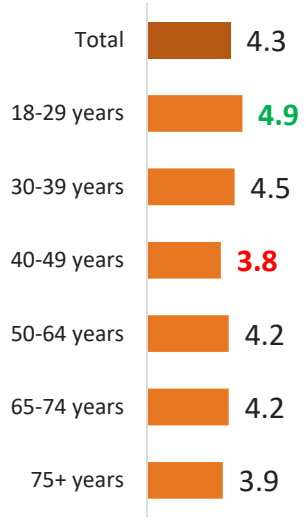
(n=1,003)

Incandescent Bulbs

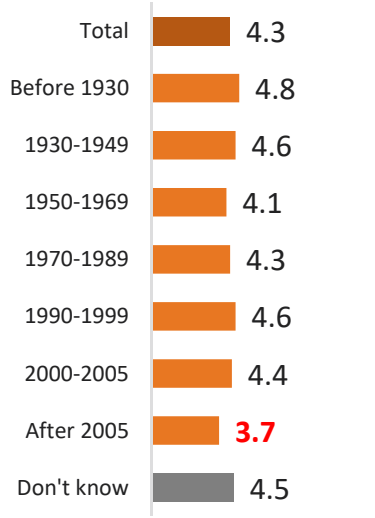
Income



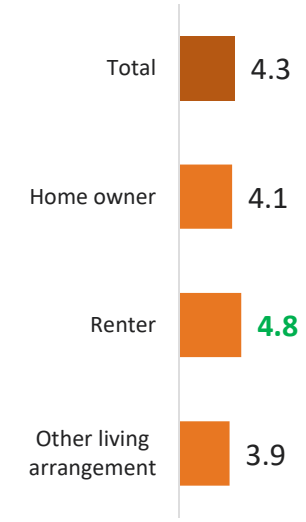
Age



Year Home Built



Home Ownership



Note: *The higher the mean score, the more negative people feel about disconti-nuation.*

Green is sig. ↑, Red is sig. ↓ than Total

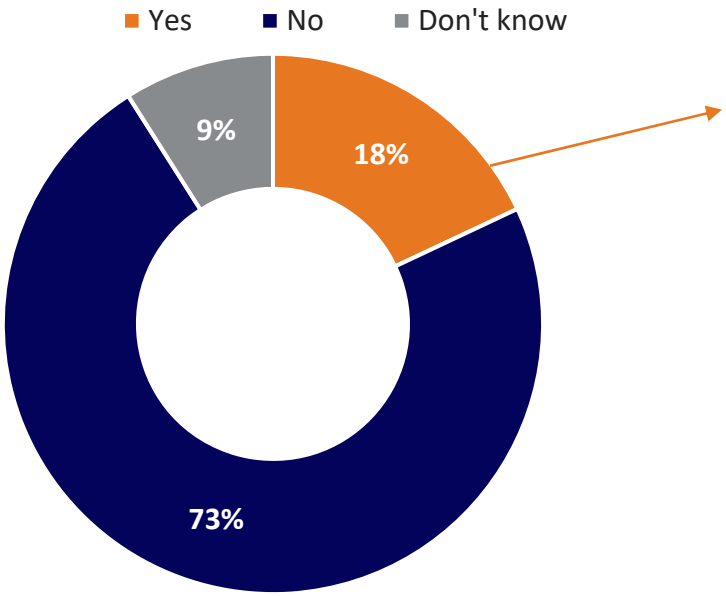
BD1a: *On a scale from 1 to 10, where 1 means this wouldn't bother you at all and 10 means this would matter to you a lot, how would you feel if incandescent light bulbs were no longer available?*

Base: *Total sample (n=1,003).*

Almost a fifth of people say they would have an issue if incandescent bulbs were no longer available, with *cost / price* the largest difficulty caused

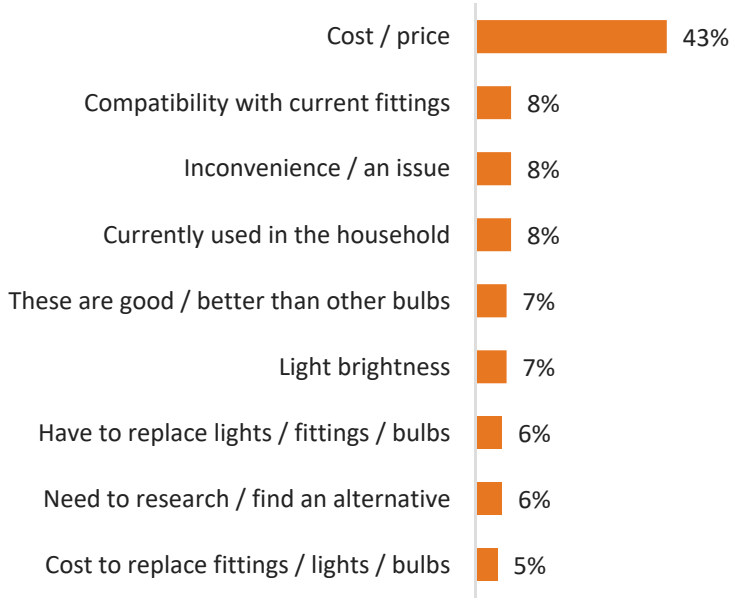
Incandescent Bulbs

If incandescent bulbs were no longer available, would this be an issue?



Difficulties / problems caused?

(n=180)



BD1b: *And if incandescent light bulbs were no longer available, would this be a major inconvenience or problem for you?* ***Base:*** *Total sample (n=1,003)*

BD1c: *Can you tell us what difficulties or problems this would cause you?* ***Base:*** *Those who would have difficulties if incandescent bulbs were no longer available (n=180).* ***Note:*** *Only problems with >5% shown.*

The discontinuation of incandescent bulbs appears to be a greater issue for those whose home was built before 1949

If incandescent bulbs were no longer available, would this be an issue? (% Yes problem)

(n=1,003)

Incandescent Bulbs

Income

Total	18%
<$60,000	19%
$60,001-$70,000	22%
$70,001-$100,000	21%
$100,001-$120,000	14%
$120,001-$140,000	16%
>$140,000	9%
Refused / Don't know	19%

Age

Total	18%
18-29 years	21%
30-39 years	16%
40-49 years	16%
50-64 years	18%
65-74 years	19%
75+ years	13%

Year Home Built

Total	18%
Before 1930	33%
1930-1949	30%
1950-1969	21%
1970-1989	18%
1990-1999	21%
2000-2005	13%
After 2005	8%
Don't know	18%

Home Ownership

Total	18%
Home owner	16%
Renter	23%
Other living arrangement	15%

Green is sig. ↑, Red is sig. ↓ than Total

BD1b: *And if incandescent light bulbs were no longer available, would this be a major inconvenience or problem for you?*

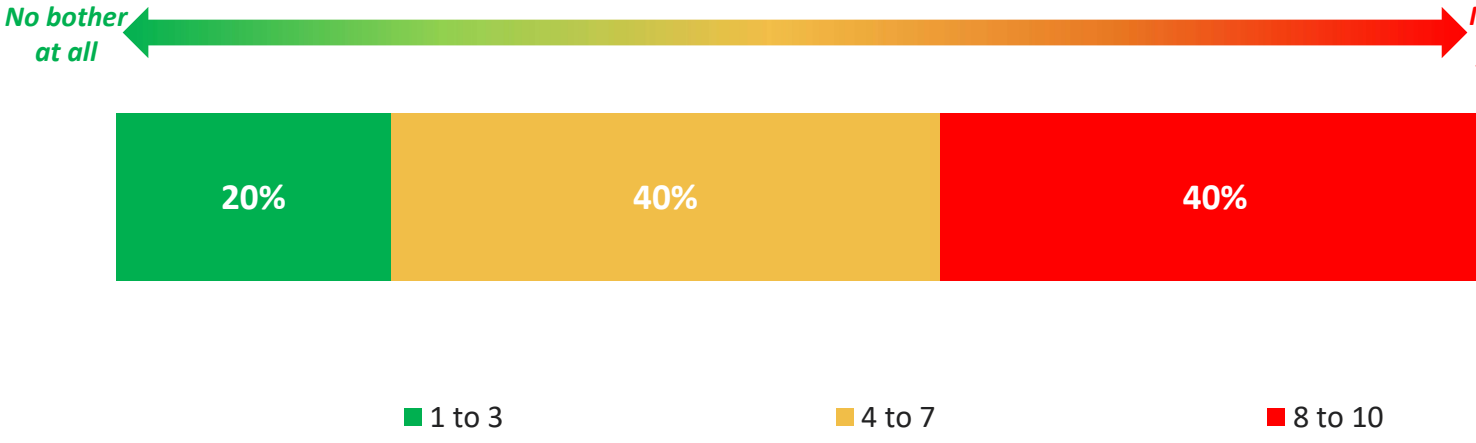
Base: *Total sample (n=1,003)*

More people would feel concerned if LED light bulbs were no longer available than for incandescent light bulbs

How would you feel if LED bulbs were no longer available?

(n=1,003)

LED Bulbs



Mean Score

6.2

Note: *The higher the mean score, the more negative people feel about discontinuation.*

BD2a: *On a scale from 1 to 10, where 1 means this wouldn't bother you at all and 10 means this would matter to you a lot, how would you feel if LED light bulbs were no longer available?*

Base: *Total sample (n=1,003).*

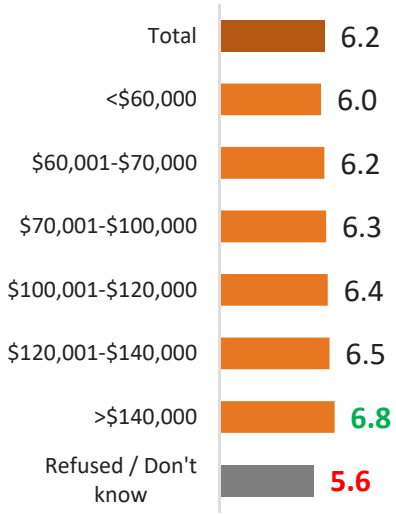
People with higher incomes and newer homes tended to be the most concerned about the discontinuation of LED light bulbs

How would you feel if LED bulbs were no longer available? (Mean)

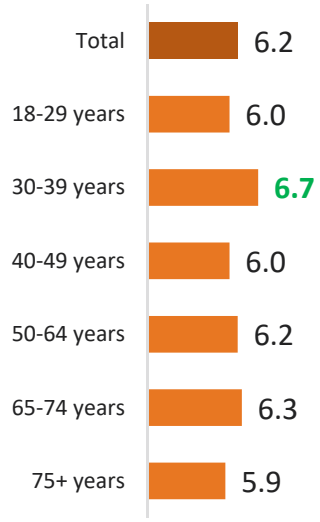
(n=1,003)

LED Bulbs

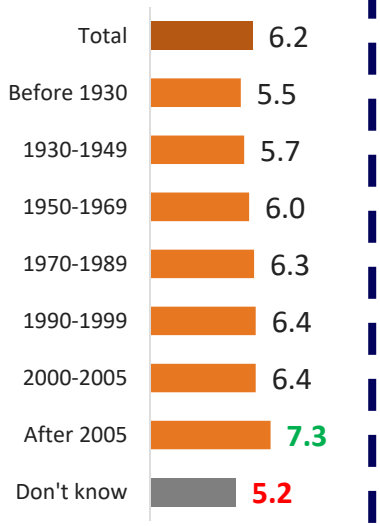
Income



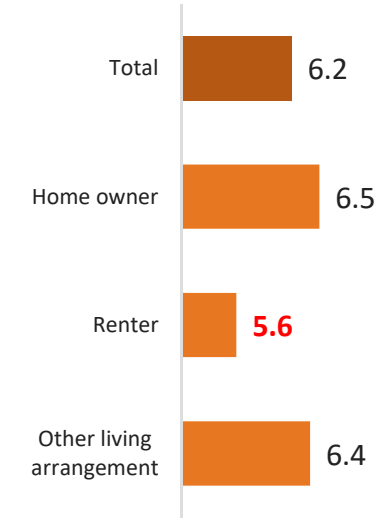
Age



Year Home Built



Home Ownership



Note: *The higher the mean score, the more negative people feel about disconti-nuation.*

Green is sig. ↑, Red is sig. ↓ than Total

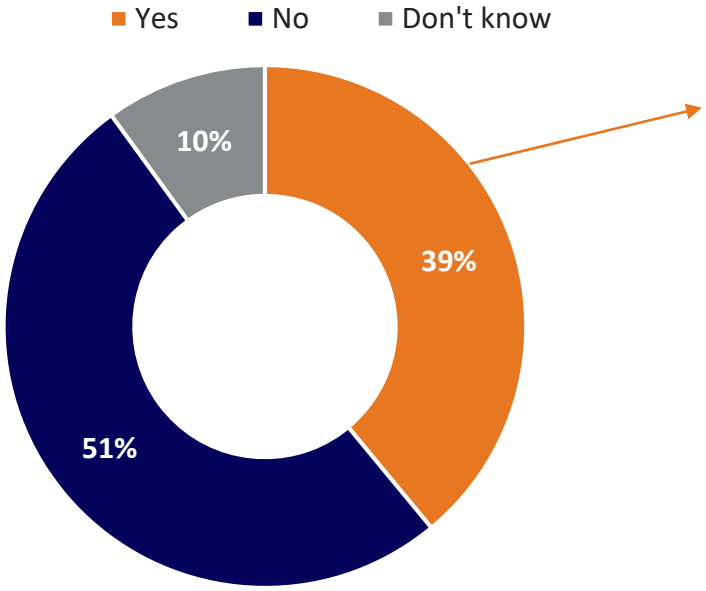
BD2a: *On a scale from 1 to 10, where 1 means this wouldn't bother you at all and 10 means this would matter to you a lot, how would you feel if LED light bulbs were no longer available?*

Base: *Total sample (n=1,003).*

Almost 40% of people said they would face difficulties if LED light bulbs were discontinued, with a wide range of factors cited

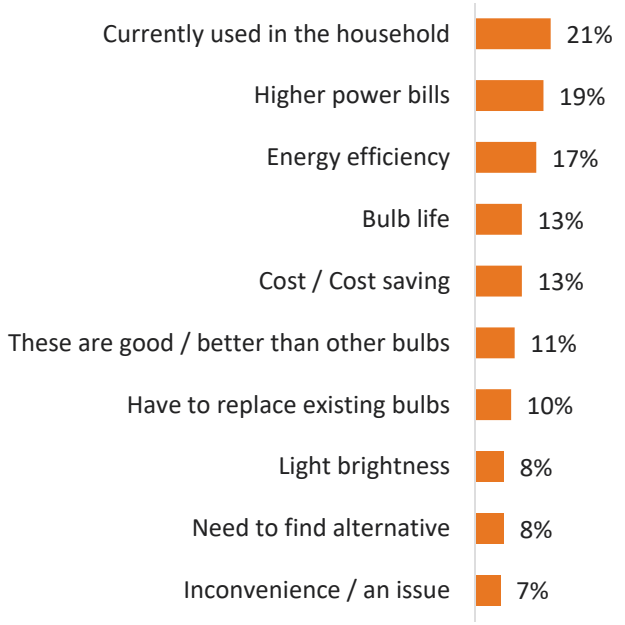
LED Bulbs

If LED bulbs were no longer available, would this be an issue?



Difficulties / problems caused?

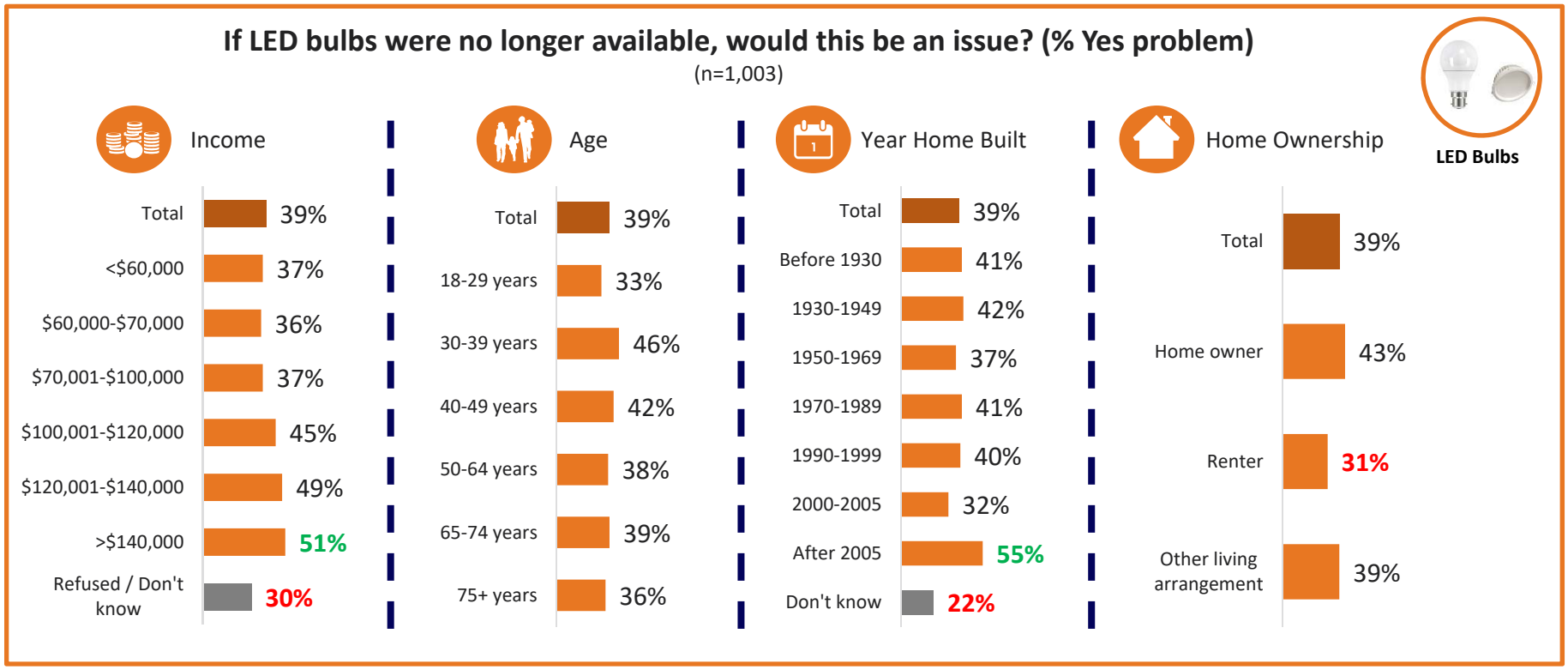
(n=383)



BD2b: *And if LED light bulbs were no longer available, would this be a major inconvenience or problem for you?* ***Base:*** *Total sample (n=1,003)*

BD2c: *Can you tell us what difficulties or problems this would cause you?* ***Base:*** *Those who would have difficulties if LED bulbs were no longer available (n=383).* ***Note:*** *Only problems with >5% shown.*

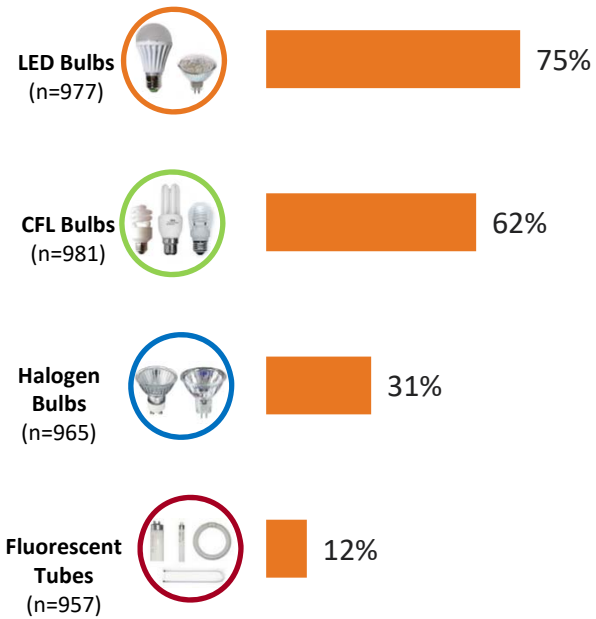
As income rises and age of home lowers, there is an increase in difficulties faced if LED bulbs were no longer available



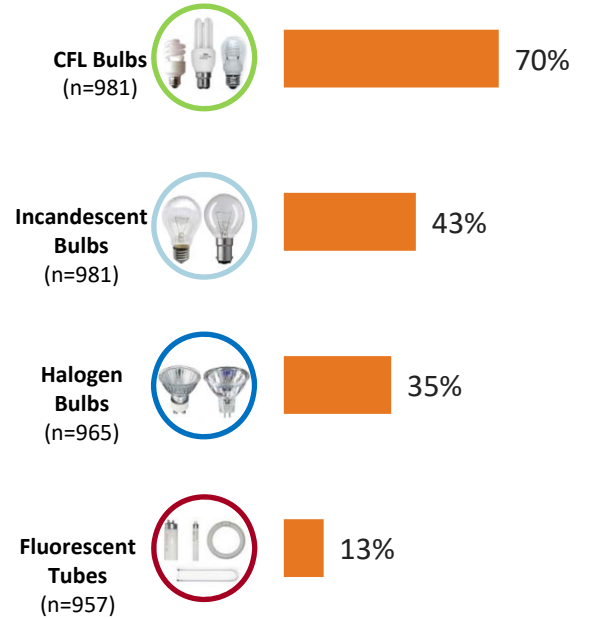
BD2b: *And if LED light bulbs were no longer available, would this be a major inconvenience or problem for you?*
Base: *Total sample (n=1,003)*

Encouragingly, ¾ of people would switch to LEDs if incandescents were no longer unavailable; if LEDs were no longer available, they would switch to CFLs

Most likely to purchase instead of incandescent bulbs



Most likely to purchase instead of LED bulbs



BD1d: *And if incandescent light bulbs were no longer available, which of the following light bulb types would you be most likely to buy instead to replace them? /* ***BD2d:*** *And if LED light bulbs were no longer available, which of the following light bulb types would you be most likely to buy instead to replace them?*

Base: *Those aware of the various light bulb types*

LIGHT BULB DISCONTINUATION SUMMARY

- **Overall, the majority of people would be unconcerned if incandescent light bulbs were no longer available.**
  - There is a link between household income and level of concerns, with lower incomes tending towards concern with incandescent bulbs being discontinued and higher incomes tending towards concern if LEDs were discontinued.
  - Far more people would be concerned if LED light bulbs were discontinued.
- **Just under a fifth of people believe that it would be an issue for them if incandescent light bulbs were discontinued.**
  - Price / cost is the main difficulty / problem cited, with people in older homes (pre-1950s) more likely to say it would present issues for them.
  - Far more people believe it would be an issue if LED light bulbs were discontinued (39%), with those on high incomes and in newer homes (post-2005) saying it would present issues for them.
- **Encouragingly, if incandescent light bulbs were discontinued, the majority of people would switch to the most energy-efficient option in the market for their lighting needs, namely LED bulbs.**
  - Similarly, if LEDs were discontinued, people would tend to switch to the next energy-efficient option of CFLs.

Contacts

Information withheld under section 9(2)(a)

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GAME CHANGERS

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GAME CHANGERS Ipsos

DECEMBER 2017

EECA Energy-Efficient Lighting Update

PREPARED FOR: EECA

PREPARED BY: IPSOS

CONTACT: Information withheld under section 9(2)(a)

GAME CHANGERS

Executive Summary

LIGHT BULB USAGE

- Versus 2014, awareness, consideration and usage for LEDs have all improved substantially. The results for CFL are broadly stable though usage has eased.
- 42% say they use LEDs more vs 3 years ago, though most users are low users or flirt users.
- 33% have never used LEDs before – often citing *cost* and *fittings* as being barriers.
- Although 28% intend to stop using incandescent bulbs, there are still a sizeable proportion who intend to keep buying these bulbs.

LED use has grown significantly in recent years, which indicates that in terms of marketing, education, and engagement, the market is nearing a tipping point where this is no longer required. The remaining scope lies in low/non-users who are wedded to incandescent bulbs. This segment's main barrier to use is up-front costs, they accept low energy use benefits.

ATTITUDES ABOUT BULBS

- Versus 2014, energy-efficient lighting is more important (65%, up 8 points) and more appealing (71%, up 8 points).
- Versus 2014, the appeal of LEDs has grown to become the most appealing bulb type in 2017, while appeal of CFLs declined significantly.
- The most appealing qualities of LED and CFL bulbs are *lower power bills* and *longevity*. But for incandescent bulbs it's about being *cheap to buy* and *fit for purpose*.

The majority of people accept the superiority and benefits of LEDs, with up-front costs the main barrier amongst lower users who tend to be female, renters and low-income. As part of a strategy to overcome this barrier, LED bulbs could be repositioned for this group as an 'appliance', an investment that they can take with them when they shift homes.

LED BULBS & EE LIGHTING

- Supermarkets are a common shopping channel for light bulbs.
- In the home, LEDs are more likely to be used in higher-usage areas (bedrooms, kitchen / dining areas, lounge / living areas).
- 47% believe the benefits of LEDs outweigh the barriers, but 25% believe the opposite.
- Indicatively versus 2014, people are more positive about the benefits of energy-efficient bulbs, but more see *price* and *suitable fittings* as a barrier.

There may be scope to better inform people about LED bulbs by addressing concerns around costs vs. benefits and light fittings. Supermarkets are a valuable channel for in-store communications, but hardware stores are presently a major channel for LED bulb purchase which may require attention. With further price drops expected in 2018, the cost-benefit equation may change.

Table of Contents

RESEARCH OBJECTIVES & METHODOLOGY

Why & how we're conducting this research

RESEARCH OBJECTIVES

- Provide an updated understanding of the role of efficient lighting in the home.
- Measure known and identify potentially unknown barriers towards efficient lighting options among NZ consumers to understand if there has been a shift in perceptions.
- Understand whether people are happy with current energy-efficient lighting alternatives (particularly LEDs) vs. incandescent.

RESEARCH METHODOLOGY

- Online survey of a randomly-selected general population sample from the Research Now panel (n=502).
- Interviews were completed from 16th to 20th November 2017, the average interview duration was 13 minutes.
- The data wasn't weighted because sampling quotas were managed to ensure a sample representative of the 2013 Census for age, gender and region.
- The margin of error on a sample size of 502 is ±4.37%. For the NZ population the figure used is 4,837,817 from the Statistics NZ estimate as at 11 December 2017.

SAMPLE PROFILE

We interviewed a nationally representative sample for this study based on age, gender & region

(n=502)
respondents

13 minutes
average duration

48% Male

52% Female

21% 18-29 years

35% 30-49 years

25% 50-64 years

19% 65+ years

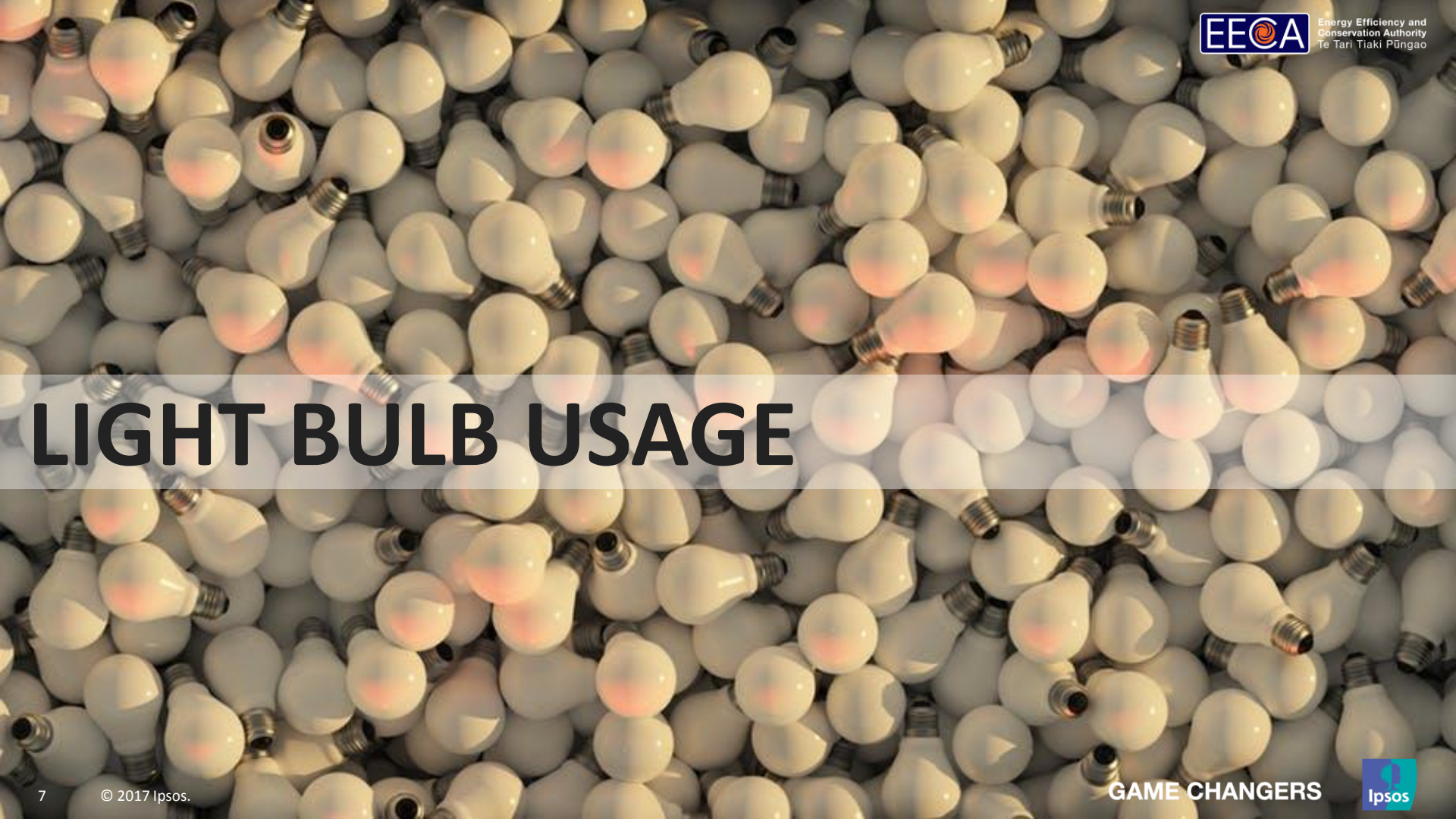
65% Homeowner
29% Renter
6% Other living arrangements

20% Northern Regions (excl. AKL)
33% Auckland Region
23% Central Regions
24% Southern Regions

7% NZ Maori
69% NZ European
9% Other European
2% Pacific Islander
5% Chinese
4% Indian
5% Other Asian

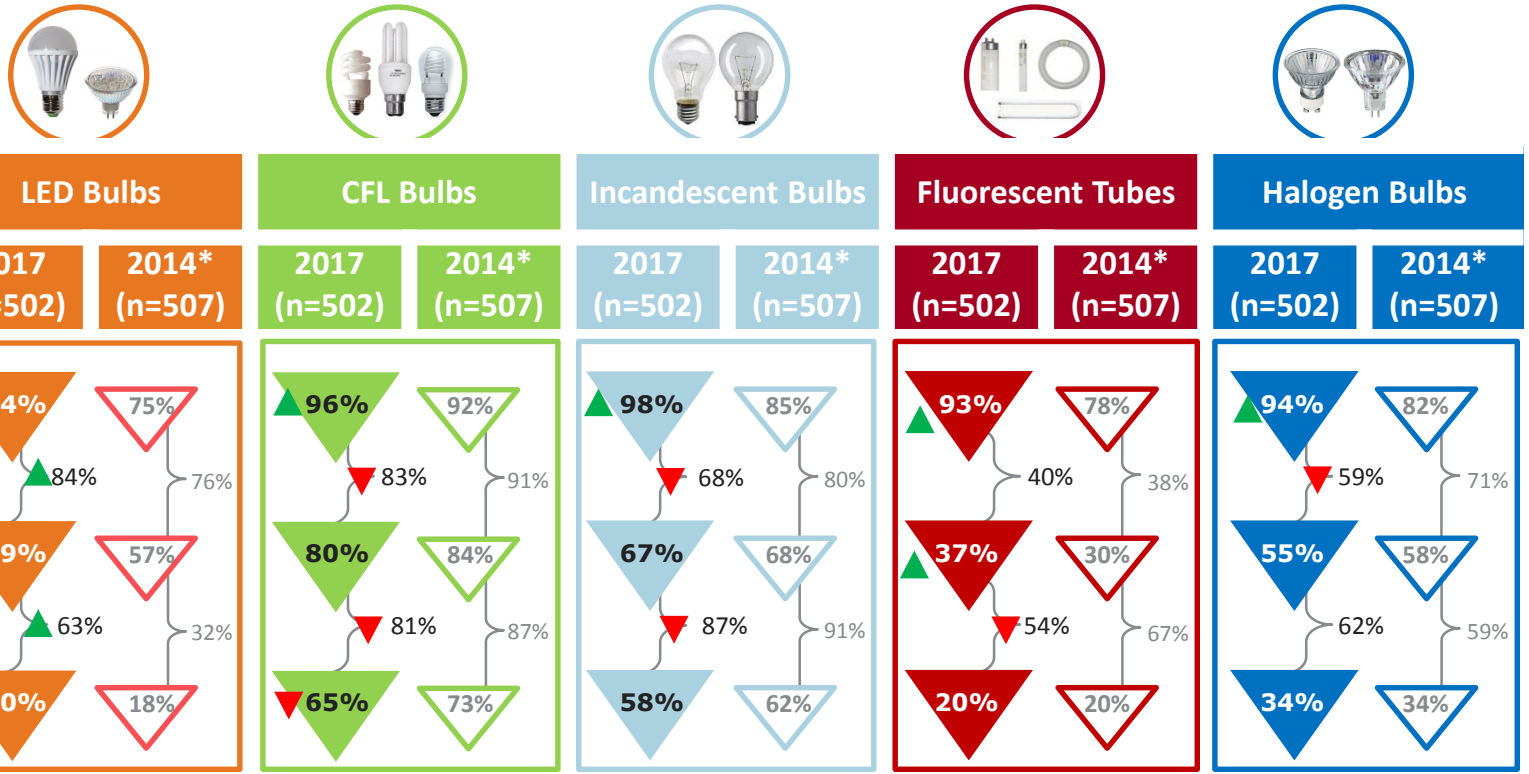
37% $60,000 or less
7% $60,001 to $70,000
17% $70,000 to $100,000
10% $100,001 to $120,000
6% $120,001 to $140,000
8% $140,001 or more
16% Don't know / Refused

41% Household with children
17% Single / one-person household
9% In a flatting arrangement
21% Older couple, no kids at home
10% Younger couple without kids



LIGHT BULB USAGE

Awareness, consideration & usage of LEDs improved significantly since 2014, but there is still scope to convert more who consider using LEDs into users



Green triangle is sig. ↑, Red triangle is sig.↓ than 2014

***Note:** 2014 EECA Change In State research*

***EL9:** Using the options below, which best describes what you use in your home currently?*

***Base:** Total sample*

Accompanying increased acceptance & use of LEDs, there has been a corresponding increase in rejection of incandescent lightbulbs





	2014* (n=507)	LED Bulbs	2014* (n=507)	CFL Bulbs	2014* (n=507)	Incandescent Bulbs	2014* (n=507)	Fluorescent Tubes	2014* (n=507)	Halogen Bulbs
Yes I use them	18%	**50%**	73%	**65%**	62%	**58%**	20%	**20%**	34%	**34%**
High users (most or virtually all)	N/A	19%	N/A	28%	N/A	18%	N/A	1%	N/A	3%
Flirt users (quarter to half)	N/A	16%	N/A	19%	N/A	17%	N/A	2%	N/A	7%
Only a few	N/A	15%	N/A	17%	N/A	23%	N/A	16%	N/A	25%
No but I would consider using them	39%	**29%**	11%	15%	7%	9%	10%	**17%**	23%	20%
No and I don't know if I would consider them	10%	10%	2%	**7%**	4%	**10%**	15%	**23%**	11%	**21%**
No and I wouldn't consider them	7%	5%	6%	9%	13%	**21%**	32%	33%	13%	**19%**
I don't know what this is	25%	**6%**	8%	**4%**	15%	**2%**	22%	**7%**	18%	**6%**

Green is sig. ↑, Red is sig.↓ than 2014

***Note:** 2014 EECA Change in State research. Proportions for each bulb type weren't specifically asked in 2014.*

***EL9:** Using the options below, which best describes what you use in your home currently? / **EL9b:** And how much of the lighting in and around your home would each of the following light bulbs. **Base:** Total sample (n=502)*

WHO ARE THE DIFFERENT BULB USER TYPES?

Incandescent high users skew towards females, younger & renters; LED low / non-users skew towards female, lower-income households & renters; LED high users skew towards males, aged 50+, higher-income households & homeowners

18% of the market are incandescent high users (I.B. high)
65% of the market are LED low / non-users (LED low / non)
19% of the market are LED high users (LED high)

Gender	Total (n=502)	I.B. high (n=90)	LED low / non (n=327)	LED high (n=97)
Male	48%	38%	43%	53%
Female	52%	62%	57%	47%

Age group	Total (n=502)	I.B. high (n=90)	LED low / non (n=327)	LED high (n=97)
18-29 years	21%	31%	22%	21%
30-39 years	16%	21%	17%	19%
40-49 years	19%	12%	20%	11%
50-64 years	25%	20%	23%	28%
65 years+	19%	16%	18%	22%

Ethnicity	Total (n=502)	I.B. high (n=90)	LED low / non (n=327)	LED high (n=97)
European	77%	89%	80%	73%
Maori	7%	7%	6%	8%
Pacific	2%	1%	2%	1%
Asian	14%	4%	12%	21%

Household type	Total (n=502)	I.B. high (n=90)	LED low / non (n=327)	LED high (n=97)
Younger couple, no kids	10%	12%	10%	15%
HH with youngest child under 5yo	12%	13%	12%	10%
HH with youngest child 5-13yo	11%	11%	11%	7%
HH with youngest child 14-17yo	7%	1%	6%	6%
HH with youngest child 18yo+	12%	11%	9%	21%
Older couple, no kids	21%	12%	18%	27%
Living alone	17%	18%	21%	7%
Flatting	9%	19%	12%	4%
Extended family	0%	0%	0%	1%
Others	1%	2%	1%	2%

Annual household income	Total (n=502)	I.B. high (n=90)	LED low / non (n=327)	LED high (n=97)
Low (up to $60k)	37%	36%	42%	30%
Mid ($60-100k)	23%	29%	23%	25%
High ($100k+)	24%	14%	19%	32%

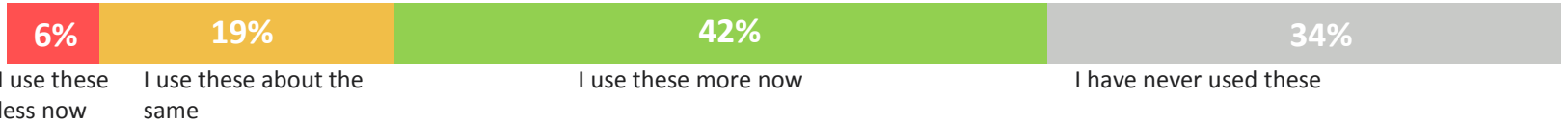
Home ownership	Total (n=502)	I.B. high (n=90)	LED low / non (n=327)	LED high (n=97)
Owner	65%	50%	59%	74%
Renter	29%	40%	36%	19%
Other	6%	10%	5%	7%

Green is sig. ↑, Red is sig.↓ than total

LED & CFL – CHANGES OVER PAST 3 YEARS

Although incandescent use is waning & LED use is rising, a third of those aware of LEDs have never used them, suggesting there is still room to encourage their trial & adoption

LED Bulbs
(n=474)



CFL Bulbs
(n=484)

Incandescent Bulbs
(n=490)

Note: *Reasons why people use incandescent bulbs more / less / same weren't asked in the questionnaire.*

NLQ3: *Which best describes how the proportion of each light bulb type you use in your home has changed compared to 3 years ago, if at all?* ***Base:*** *Those who are aware of the light bulb*

LED USAGE COMPARED TO 3 YEARS AGO

Main drivers of increased use are *energy efficiency* & *replacement*; the barriers indicate there's scope to better inform people's perceptions around *costs* & *light fittings*

LED Bulbs
(n=474)

Why using LEDs less?	(n=28*)
Cost of LEDs is high	14%
Dislike light LEDs produce	14%
Reduced need, only need for certain lights	14%
Issues with fittings / switches	7%
New house	7%
Changed to another bulb type	7%

Why using LEDs more?	(n=198)
Energy-efficient, power saving	28%
Replacing old bulbs with LEDs	25%
Longer-lasting	14%
Cost-effective longer term	13%
Better light quality	10%
LEDs are better bulbs	8%

Why never used LEDs?	(n=160)
Cost, too expensive	17%
Fittings don't suit LEDs	17%
Don't know enough about LEDs	12%
No need / no use for LEDs	11%
Haven't considered LEDs	9%
Dislike the light LEDs produce	4%

"They give out awful lighting."

"Not as much use for them."

"The cost of the bulbs."

"They are cheaper to run and last longer."

"Their energy efficiency, their brightness, the fact that they are available in many more fittings now."

"We replaced previous lights with these fittings - they became less expensive."

"Expensive. When the price comes down I will seriously consider them."

"I am not sure we have the correct fittings for them."

"Don't know much about them or what value they would have."

***Caution:** Small base (n<30)*

***NLQ4b:** You told us that the proportion of LED bulbs in your home **increased / stayed the same / decreased,** compared to 3 years ago, please can you tell us how come? **Base:** Those aware of each bulb NLQ3, NLQ4b based on applicable respondents*

CFL USAGE COMPARED TO 3 YEARS AGO

Close to half of those people who say they are using CFLs less are switching towards LEDS rather than slipping back towards inefficient lighting options

CFL Bulbs
(n=484)

Why using CFLs less?	(n=119)
Changing to LEDs	37%
Dislike light CFLs produce	12%
Prefer LEDs	9%
Bulbs are expensive	8%
Not energy-efficient	8%
Issues with fittings / switches	6%
Not reliable / durable	6%

"LED are a better option, they're more environmentally friendly, they last longer, the light is better and they don't contain mercury, so as our CFL bulbs die, they're being replaced with LED."

"I stopped purchasing them because LEDs last longer and are as cheap to buy."

Why using CFLs more?	(n=176)
Energy-efficient, power saving	33%
Replacing old bulbs with CFLs	18%
Longer-lasting	16%
Cost-effective longer-term	15%
Moved house	7%
Better for the environment	7%

"They are cost efficient and produce longer hours of bulb life."

"Because they are more energy efficient and cheaper to run."

"Last longer, so I try to buy them when I need to replace bulbs."

Why never used CFLs?	(n=69)
Prefer / use / changed to LED	13%
Prefer / use other types	10%
Cost, too expensive	9%
Toxic materials, radiation, mercury	9%
I don't like how CFLs look	9%
Don't know enough about CFLs	9%

"We switched to LEDs a long time ago and didn't have a need for them."

"Quite happy with the current bulbs we have been using since shifting to this house."

Green is sig. ↑, Red is sig.↓ than LED Bulbs

NLQ4a: *You told us that the* ***proportion of CFL bulbs*** *in your home* ***increased / stayed the same / decreased,*** *compared to 3 years ago, please can you tell us how come?* ***Base:*** *Those aware of each bulb NLQ3, NLQ4a based on applicable respondents*

LEDs have the highest levels of stated continued use or intention to replace compared to other bulb types; only a fifth of the market actively reject LED bulbs

	LED Bulbs	2014*	CFL Bulbs	2014*	Incandescent Bulbs	2014*	Fluorescent Tubes	2014*	Halogen Bulbs	2014*
I plan to continue to use these types of bulbs	43%	18%	43%	59%	27%	30%	14%	17%	24%	30%
I plan to start using these when I need replacement bulbs in the future	19%	31%	10%	18%	5%	5%	5%	5%	6%	10%
I plan to stop using these types of bulbs in the future	4%	9%	17%	6%	28%	33%	8%	8%	13%	18%
I don't know	13%	N/A	11%	N/A	6%	N/A	10%	N/A	13%	N/A
Don't use and don't consider	21%	42%	19%	17%	34%	32%	63%	70%	44%	42%

Green is sig. ↑, Red is sig.↓ than 2014

***Note:** 2014 EECA Change in State research, please note that 'Don't know' wasn't an option.*

***EL11:** And thinking about the following types of light bulbs that you currently use or don't use in your home, how likely are you to continue to use, start using if you haven't already, or stop using? **Base:** Total sample – 2017 (n=502), 2014 (n=507)*

COMPARING BULB USAGE WITH FUTURE INTENT

LEDs users are committed to using LEDs & CFL users are shifting in that direction as well; but there's still scope to increase momentum away from incandescent bulb usage

	LED Bulb users		CFL Bulb users		Incandescent Bulb users	
	All users '17 (n=253)	All users '14* (n=98)	All users '17 (n=327)	All users '14* (n=383)	All users '17 (n=290)	All users '14* (n=309)
LED bulbs						
I plan to continue using these	81%	70%	38%	17%	35%	18%
I plan to start using when I need replacement bulbs	13%	23%	22%	35%	20%	30%
I plan to stop using these bulbs	3%	7%	4%	9%	3%	11%
CFL bulbs						
I plan to continue using these	27%	58%	64%	79%	43%	52%
I plan to start using when I need replacement bulbs	8%	6%	8%	14%	13%	23%
I plan to stop using these bulbs	27%	15%	23%	8%	16%	8%
Incandescent bulbs						
I plan to continue using these	20%	21%	22%	24%	46%	46%
I plan to start using when I need replacement bulbs	4%	2%	5%	4%	7%	7%
I plan to stop using these bulbs	28%	42%	34%	36%	42%	47%

Green is sig. ↑, Red is sig.↓ than 2014

***Note:** 2014 EECA Change in State research*

***EL9:** Using the options below, which best describes what you use in your home currently? / **EL11:** And thinking about the following types of light bulbs that you currently use or don't use in your home. How likely are you to continue to use, start using if you haven't already, or stop using? **Base:** Re-based on total sample – 2017 (n=502), 2014 (n=507)*

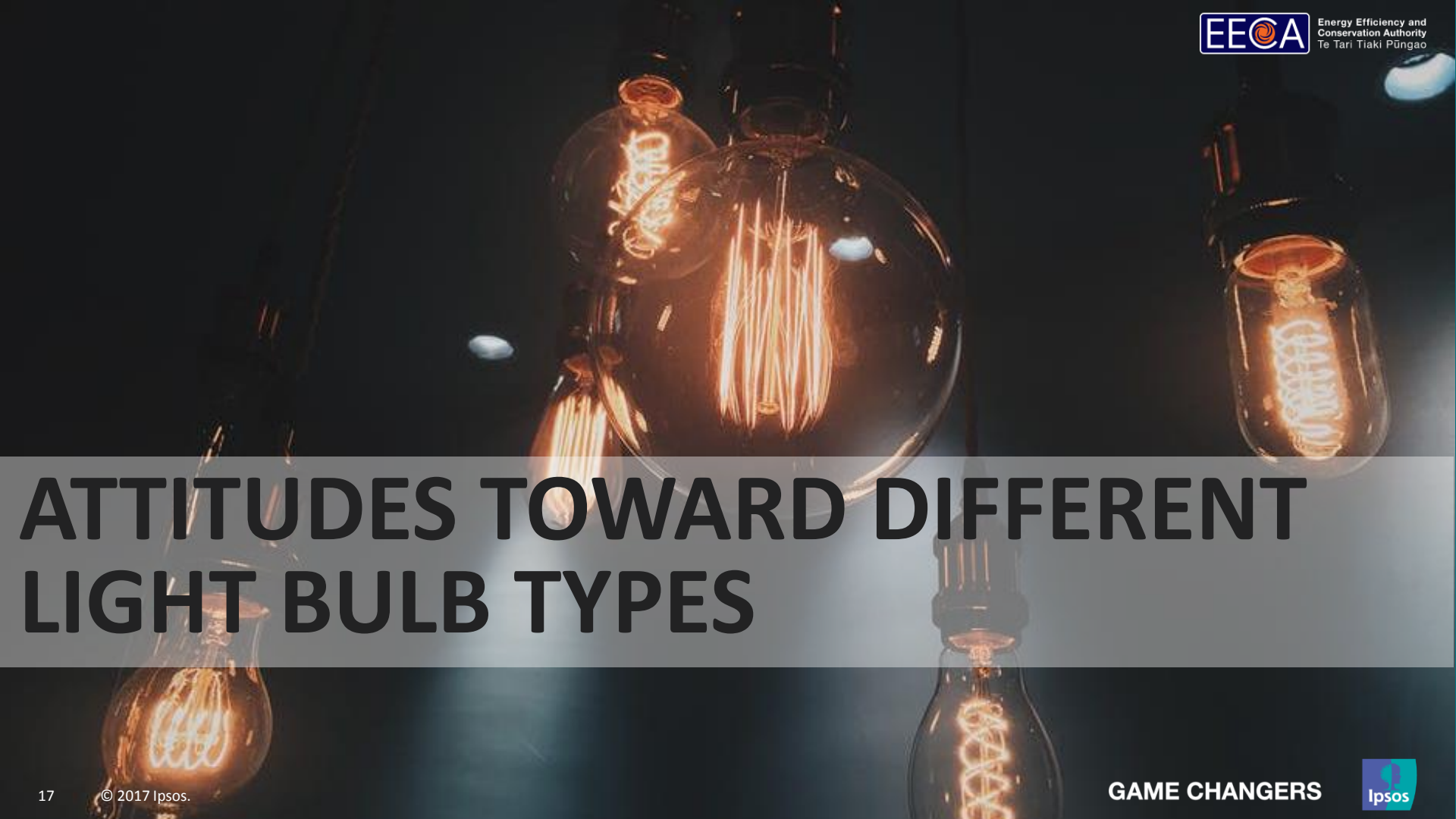
COMPARING BULB PROPORTIONS WITH FUTURE INTENT

High users of incandescent bulbs are fairly steadfast in their commitment to continued use, but there is potential to shift use amongst those whose incandescent usage is lower

	Total '17 (n=502)	LED Bulb users: Low users (n=76)	LED Bulb users: Flirt users (n=78)	LED Bulb users: High users (n=97)	CFL Bulb users: Low users (n=87)	CFL Bulb users: Flirt users (n=95)	CFL Bulb users: High users (n=142)	Incandescent Bulb users: Low users (n=113)	Incandescent Bulb users: Flirt users (n=83)	Incandescent Bulb users: High users (n=90)
LED bulbs										
I plan to continue using these	43%	71%	78%	91%	54%	46%	23%	45%	42%	13%
I plan to start using when I need replacement bulbs	19%	17%	18%	6%	8%	21%	30%	24%	22%	16%
I plan to stop using these bulbs	4%	5%	3%	0%	5%	2%	4%	4%	4%	1%
CFL bulbs										
I plan to continue using these	43%	50%	27%	8%	48%	60%	77%	49%	55%	26%
I plan to start using when I need replacement bulbs	10%	11%	8%	7%	11%	7%	6%	7%	17%	16%
I plan to stop using these bulbs	17%	14%	44%	24%	30%	31%	13%	26%	13%	3%
Incandescent bulbs										
I plan to continue using these	27%	32%	23%	8%	33%	28%	11%	35%	40%	69%
I plan to start using when I need replacement bulbs	5%	7%	5%	2%	5%	8%	1%	6%	7%	7%
I plan to stop using these bulbs	28%	30%	36%	20%	31%	40%	32%	52%	48%	23%

Green is sig. ↑, Red is sig.↓ than total

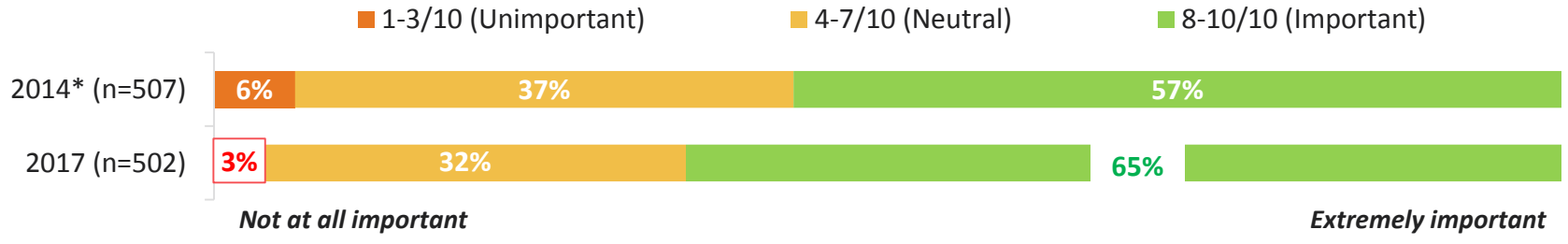
EL9: *Using the options below, which best describes what you use in your home currently? /* ***EL11:*** *And thinking about the following types of light bulbs that you currently use or don't use in your home. How likely are you to continue to use, start using if you haven't already, or stop using?* ***Base:*** *Re-based on total sample (n=502)*



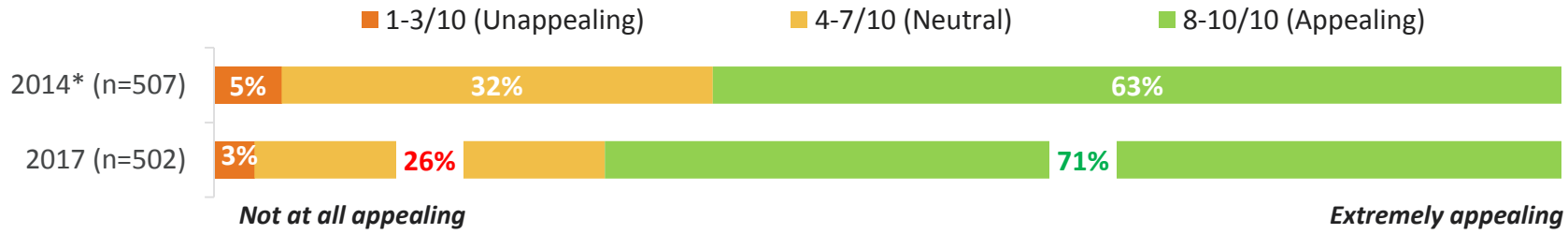
ATTITUDES TOWARD DIFFERENT LIGHT BULB TYPES

The *importance* & *appeal* of energy-efficient lighting have improved significantly, suggesting that people have bought into & are receptive to messaging around lighting

Energy-Efficient Lighting Importance (10pt scale)



Energy-Efficient Lighting Appeal (10pt scale)



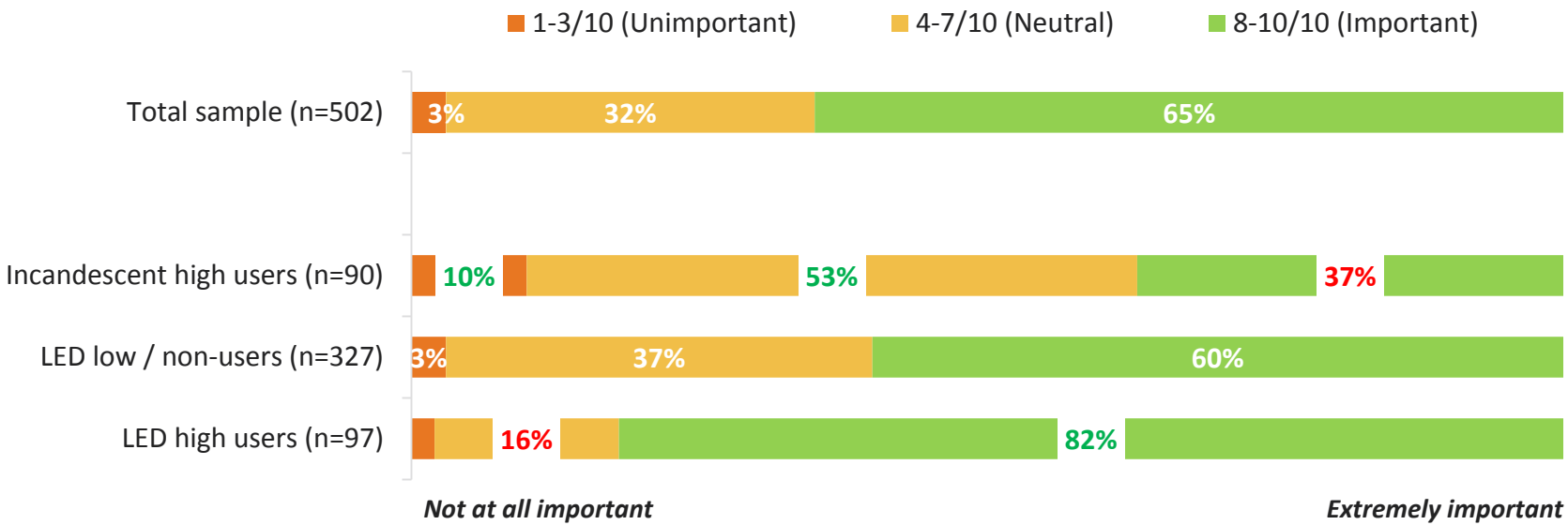
Green is sig. ↑, Red is sig.↓ than 2014

***Note:** 2014 EECA Change in State research*

***EL1:** Thinking about energy-efficient lighting, how important is it to you to use energy-efficient lighting in your home? / **EL4a:** How appealing is the overall idea of energy-efficient lighting to you? **Base:** Total sample*

It is clear that the importance people place in efficient lighting is part of the pathway to LED use; high users of incandescent place a significantly lower level of importance on this

Energy-Efficient Lighting Importance (10pt scale)

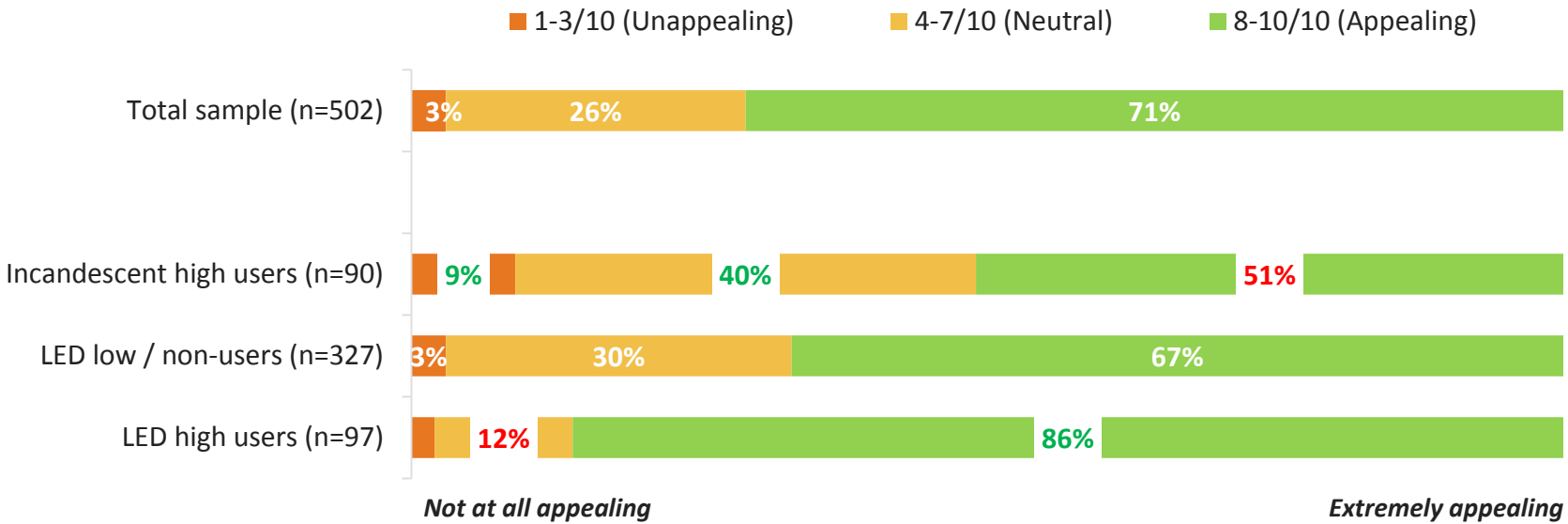


Green is sig. ↑, Red is sig.↓ than total

EL1: Thinking about energy-efficient lighting, how important is it to you to use energy-efficient lighting in your home?
Base: Total sample (n=502)

As with importance, there's a noticeable relationship between perception & behaviour regarding energy-efficient lighting, with the highest level amongst high LED users

Energy-Efficient Lighting Appeal (10pt scale)

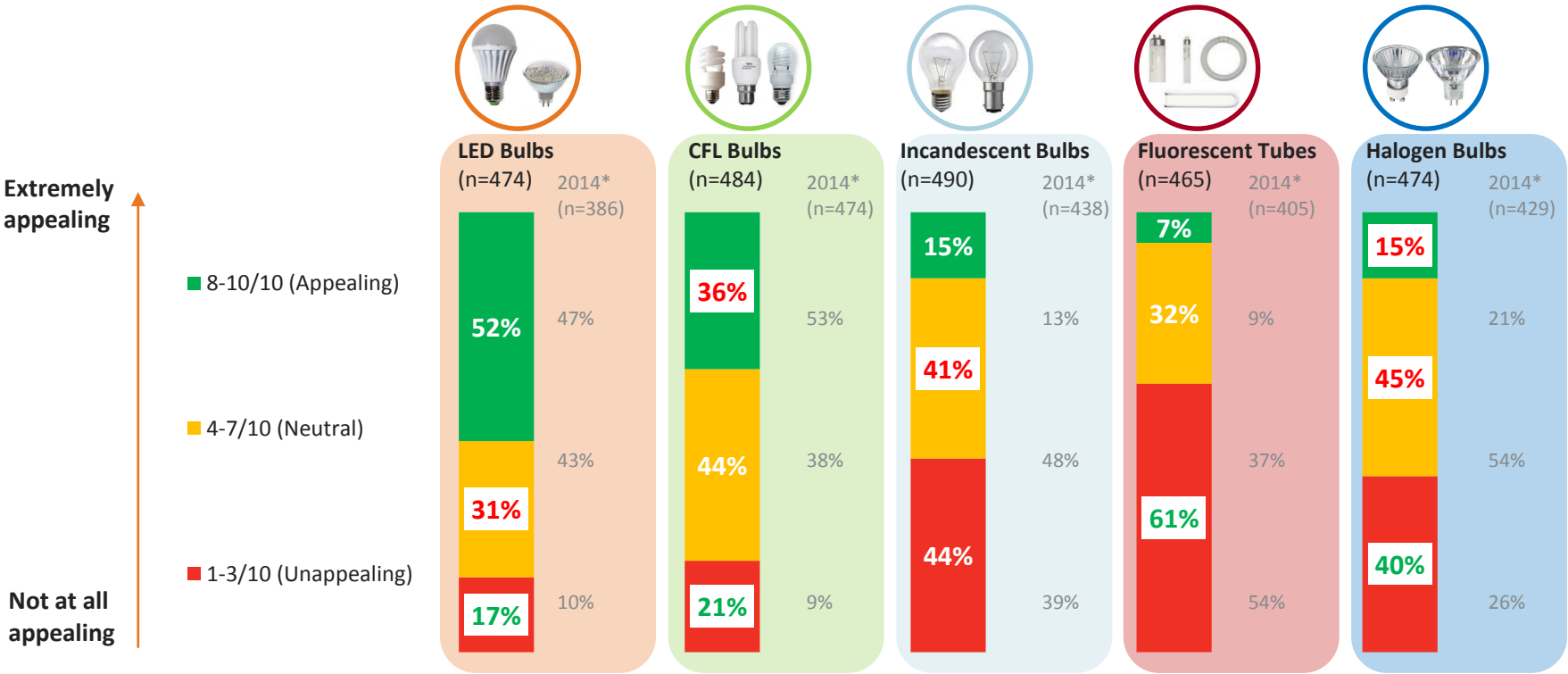


Green is sig. ↑, Red is sig.↓ than the total sample

EL4a: How appealing is the overall idea of energy-efficient lighting to you?
Base: Total sample (n=502)

APPEAL OF DIFFERENT LIGHT BULBS

At a total market level, LED bulbs are the most appealing light bulb to *meet people's lighting needs*, improving since 2014 & mostly at the expense of CFL bulbs



**Note:* *2014 EECA Change in State research*

EL4b: *How appealing are the different types of light bulbs below in terms of meeting your lighting needs?* ***Base:*** *Those aware of the light bulb type*

APPEAL OF DIFFERENT LIGHT BULBS

However, when split by segments of interest, the appeal of LEDs still has scope to improve amongst LED low / non-users & incandescent high users

Comparing T3B (8-10/10) Appeal

	LED bulbs	CFL bulbs	Incandescent bulbs
Total sample (n=474 to 490)	52%	36%	15%
Incandescent high users (n=82 to 90)	**28%**	29%	**43%**
LED low / non-users (n=299 to 322)	**36%**	**46%**	18%
LED high users (n=90 to 97)	**85%**	**10%**	**4%**

Green is sig. ↑, Red is sig.↓ than total

EL4b: *How appealing are the different types of light bulbs below in terms of meeting your lighting needs?*
Base: *Those aware of the light bulb type*

PERCEIVED VALUE OF DIFFERENT LIGHT BULBS

Lower power bills & *longer-lasting bulbs* are generally accepted benefits of LEDs; but there's room to challenge perceptions about *being fit for purpose* & *quick to light up*

	LED Bulbs (n=474)	2014* (n=386)	CFL Bulbs (n=484)	2014* (n=474)	Incandescent Bulbs (n=490)	2014* (n=438)	Fluorescent Tubes (n=465)	2014* (n=405)	Halogen Bulbs (n=474)	2014* (n=429)
Lower power bills	61%	53%	61%	85%	14%	14%	25%	32%	24%	22%
Light bulbs last longer	51%	49%	45%	74%	16%	13%	38%	41%	32%	28%
Brightness	34%	46%	14%	18%	36%	44%	43%	55%	49%	61%
Quality of the light produced	33%	41%	15%	27%	26%	27%	34%	38%	43%	52%
Fit for purpose	30%	34%	22%	44%	45%	23%	46%	59%	43%	43%
Quickly lights up to full strength	23%	38%	6%	13%	37%	62%	29%	37%	34%	50%
Inexpensive to buy	20%	13%	16%	17%	70%	79%	22%	17%	20%	13%
Safe for use	20%	16%	11%	15%	18%	18%	14%	11%	18%	13%
Easy to dispose of	10%	9%	4%	5%	25%	21%	10%	6%	11%	13%
Better for the environment	1%	N/A	1%	N/A	0%	N/A	0%	N/A	0%	N/A

Green is sig. ↑, Red is sig.↓ than 2014

***Note:** 2014 EECA Change in State research*

***EL6:** Now think about what you value most from... **Base:** Those aware of the light bulb type*

PERCEIVED VALUE OF DIFFERENT LIGHT BULBS

Across user types, the 1st & 2nd most valuable attributes of each bulb type are consistent, indicating a broader value proposition needs to develop for high incandescent users

Most valuable
2nd most valuable
3rd most valuable

	LED Bulbs				CFL Bulbs				Incandescent Bulbs			
	Total (n=474)	I.B. high (n=83)	LED non / low (n=299)	LED high (n=97)	Total (n=484)	I.B. high (n=82)	LED non / low (n=319)	LED high (n=90)	Total (n=490)	I.B. high (n=90)	LED non / low (n=322)	LED high (n=94)
Lower power bills	61%	47%	56%	72%	61%	54%	64%	51%	14%	21%	16%	12%
Quality of the light produced	33%	33%	32%	31%	15%	18%	16%	13%	26%	20%	25%	26%
Brightness	34%	35%	34%	36%	14%	18%	16%	12%	36%	37%	36%	35%
Fit for purpose	30%	39%	30%	28%	22%	21%	20%	21%	45%	48%	47%	44%
Light bulbs last longer	51%	46%	49%	53%	45%	44%	45%	43%	16%	26%	16%	16%
Quickly lights up to full strength	23%	23%	22%	28%	6%	6%	6%	2%	37%	31%	39%	31%
Easy to dispose of	10%	13%	11%	5%	4%	2%	3%	7%	25%	20%	24%	28%
Inexpensive to buy	20%	30%	21%	24%	16%	17%	16%	20%	70%	77%	71%	64%
Safe for use	20%	14%	19%	24%	11%	11%	10%	14%	18%	19%	17%	19%
Better for the environment	1%	1%	1%	0%	1%	1%	1%	0%	0%	0%	0%	0%

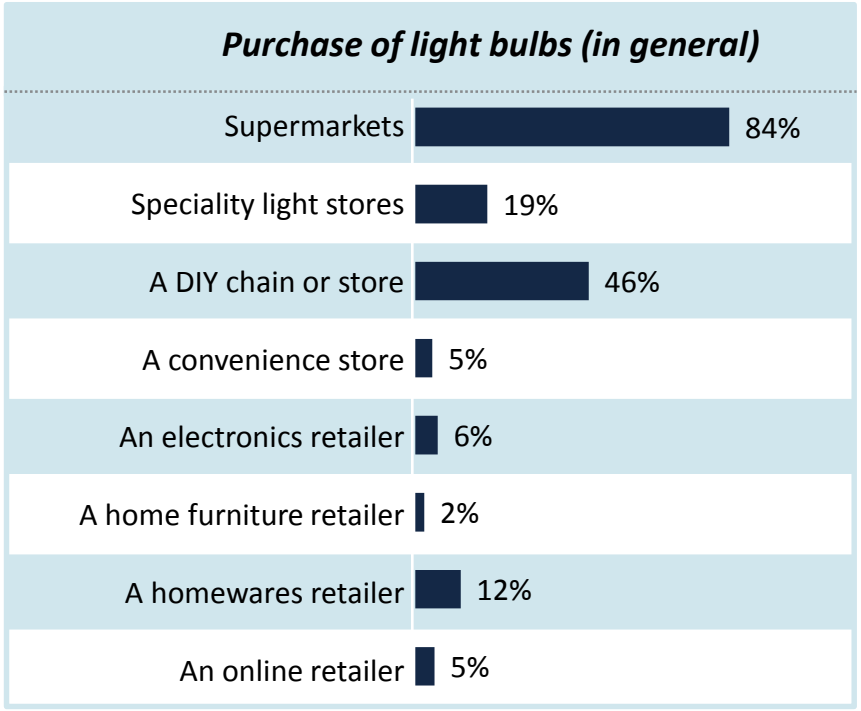
Green is sig. ↑, Red is sig. ↓ than total

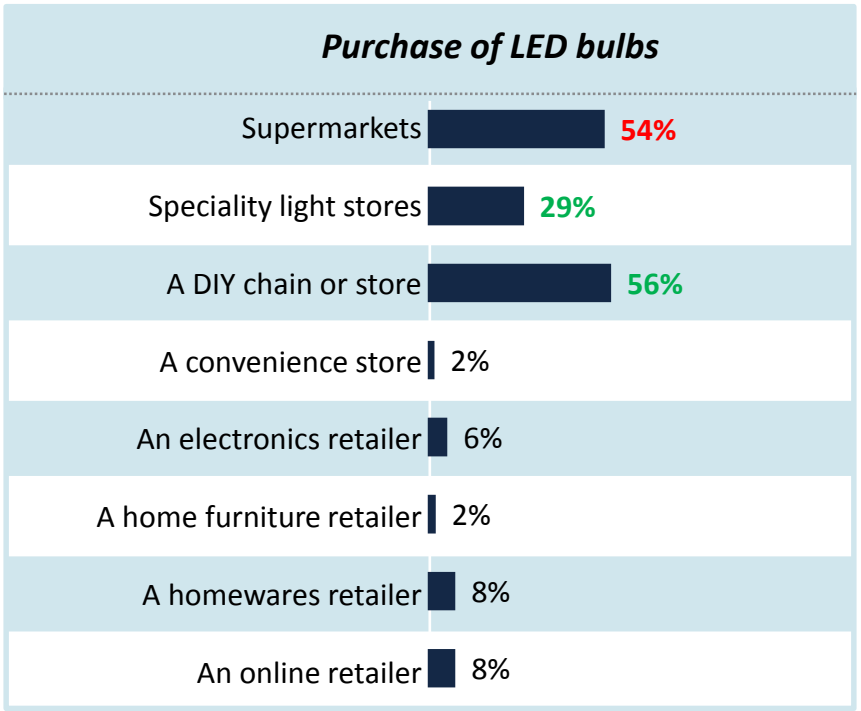
EL6: *Now think about what you value most from...*
Base: *Those aware of the light bulb type*

LED BULBS

GAME CHANGERS

LED bulb buyers are significantly less likely to shop for LEDs at supermarkets; however, supermarkets remain a valuable channel for EECA in-store marcoms



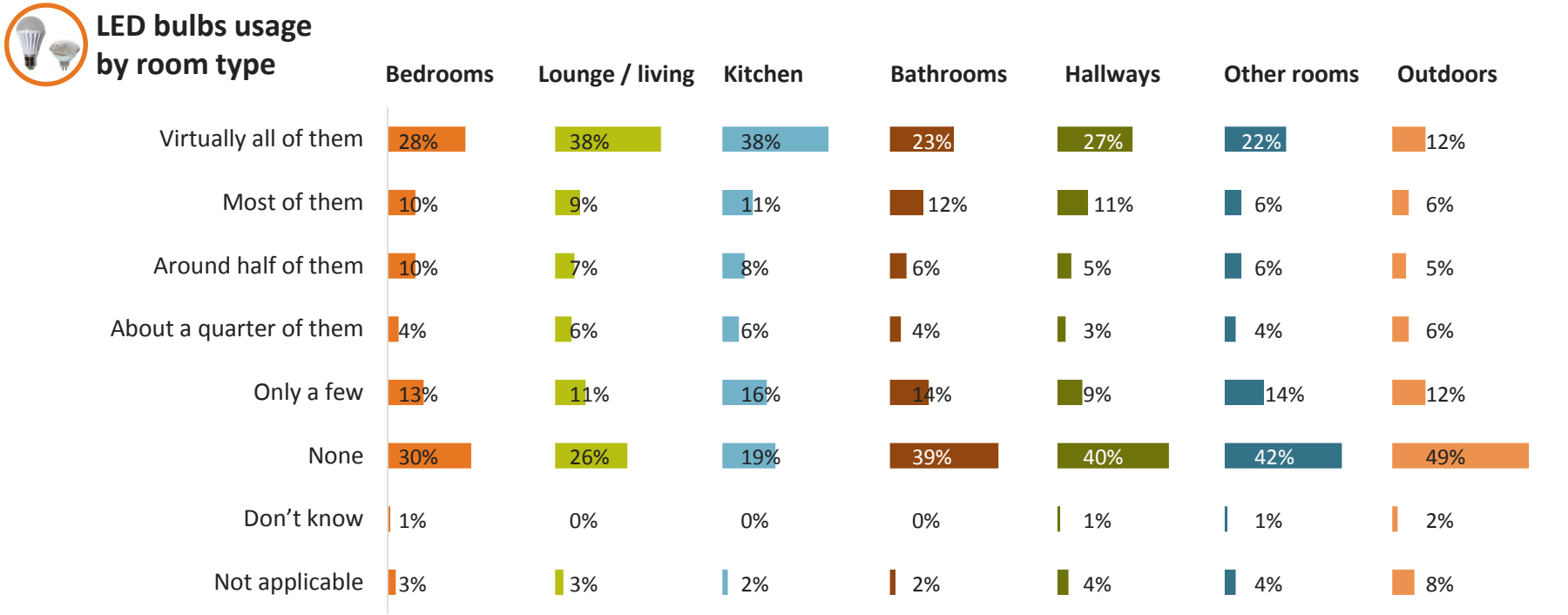


Green is sig. ↑, Red is sig.↓ than light bulbs in general

NLQ7a: *Please can you tell us where you usually buy your light bulbs?* ***Base:*** *Total sample (n=502)*
NLQ7b: *Please can you tell us where you usually buy your LED light bulbs?* ***Base:*** *LED bulb users (n=253)*

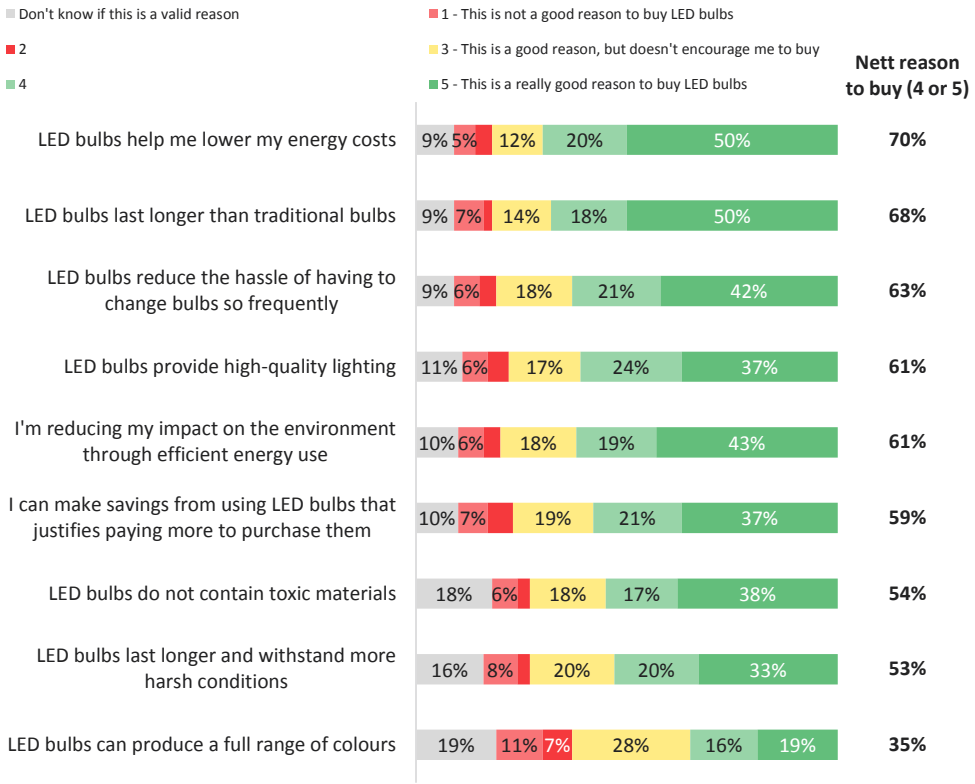
There is scope for EECA to persuade more people to use LEDs more widely in higher-usage areas of the home, particularly *bedrooms*, *kitchen / dining areas*, *bathrooms* & *hallways*

LED bulbs usage by room type



NLQ2: *Can you tell us about the proportion of* ***LED bulbs*** *you use in?*
Base: *LED bulb users (n=253)*

Virtually all benefits of LED bulbs are seen as positive reasons to buy, thus indicating that there is scope to build perceptions beyond accepted *lower energy costs* & *lasting longer*



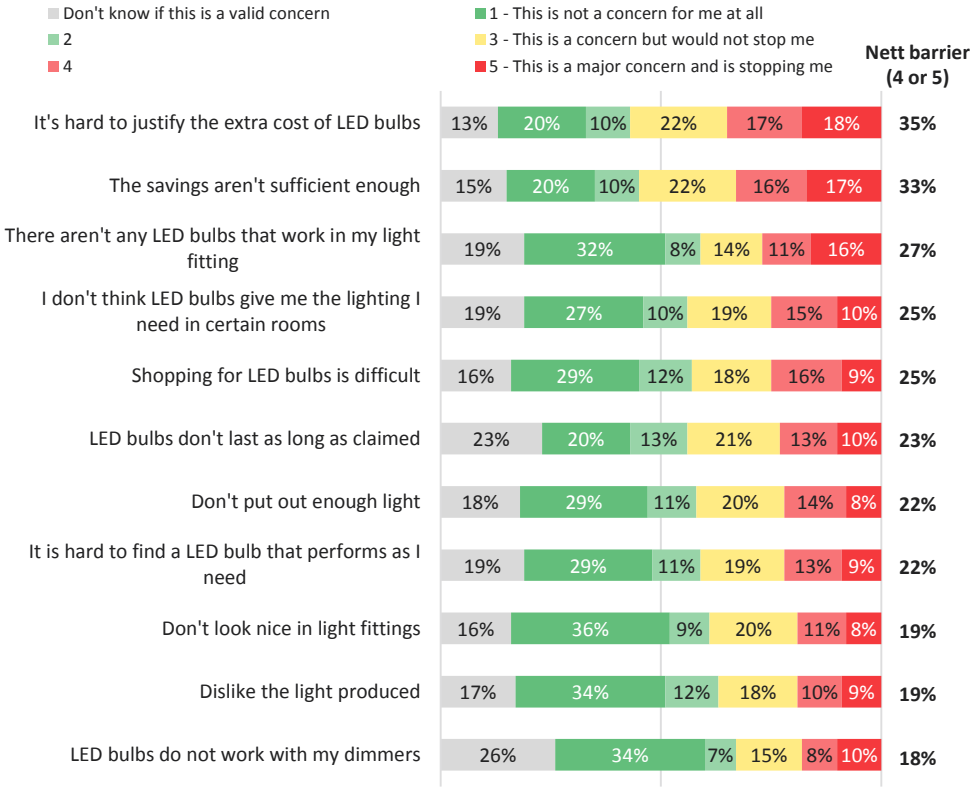
- *"The quality of light from these bulbs is great for both bathroom and kitchen use."*
- *"They look better than some bulbs that are available."*
- *"There is a better shelving arrangement when buying LED bulbs."*
- *"Since LED bulbs produce less heat than other bulbs, they can be used in environments where heat can be dangerous."*
- *"They are compact and fit in to existing sockets."*

QLT9: *Please tell us to what extent you feel that these are good reasons for you to buy LED bulbs.* ***Base:*** *Those aware of LED bulbs (n=474)*

QLT9a: *Is there anything else that you feel are good reasons to buy LED bulbs?* ***Base:*** *Those who had another good reason for purchasing LEDS (n=107)*

REASONS AGAINST BUYING LEDS

Upfront costs & *sufficient savings* are two areas EECA can better educate consumers about LEDs, although neither are barriers stopping the majority of those aware of LEDs



- *"Finding them at the right price; I will only purchase if they had a major sale."*
- *"As time goes by, the LED bulbs will become dimmer (not as bright) significantly."*
- *"Comparing relative light levels between what has been traditional (wattage) and the new (lumens) so a correct equivalent lighting level can be obtained."*
- *"The rating of LED bulbs in terms of lumens, as opposed to equivalent incandescent ratings, make buying the right bulb difficult."*
- *"They have a horrible hard light. I bought some LED Christmas lights, and even with coloured covering they look harsh."*

QLT6: *Please tell us to what extent you feel that these are concerns that stop you from buying LED bulbs.* ***Base:*** *Those aware of LED bulbs (n=474)*
QLT6a: *Is there anything else that concerns you about LED bulbs?* ***Base:*** *Those... (n=103)*

While people have bought into the benefits of LEDs outweighing the barriers, there's scope for EECA to address concerns around *costs*, *savings* & *compatible* light fittings

How the benefits of LEDs currently compare with barriers

Note: *This wasn't asked in historic research.*

Top-3 Barriers

35% It's hard to justify the extra cost of LED bulbs

33% The savings from LED bulbs aren't sufficient enough to pay so much more for them

27% There aren't any LED bulbs that work in my light fittings

Top-3 Benefits

70% I believe that LED bulbs help me lower my energy costs

68% LED bulbs last longer than traditional bulbs

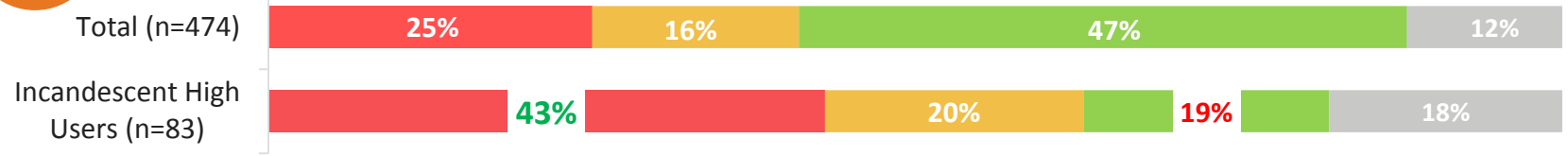
63% LED bulbs reduce the hassle of having to change bulbs frequently

NLQ6: *Thinking about the benefits and barriers towards LED bulbs, please indicate how the benefits currently compare with the barriers for you personally.* ***Base:*** *Those aware of LED bulbs (n=474)*

Incandescent high users find barriers outweigh the benefits by over 2 to 1; a sizeable proportion don't believe in the longer-term *cost* benefit of using LED bulbs

How the benefits of LEDs currently compare with barriers

Note: *This wasn't asked in historic research.*



Green is sig. ↑, Red is sig. ↓ than total

Top-3 Barriers

- **55%** (vs. 35% total) — It's hard to justify the extra cost of LED bulbs
- **45%** (vs. 33% total) — The savings from LED bulbs aren't sufficient enough to pay so much more for them
- **37%** (vs. 25% total) — I don't think LED bulbs give me the lighting I need in certain rooms

Top 3-Benefits

- **60%** (vs. 70% total) — I believe that LED bulbs help me lower my energy costs
- **59%** (vs. 68% total) — I believe that LED bulbs last longer than traditional bulbs
- **56%** (vs. 61% total) — I believe I'm reducing my impact on the environment through efficient energy use

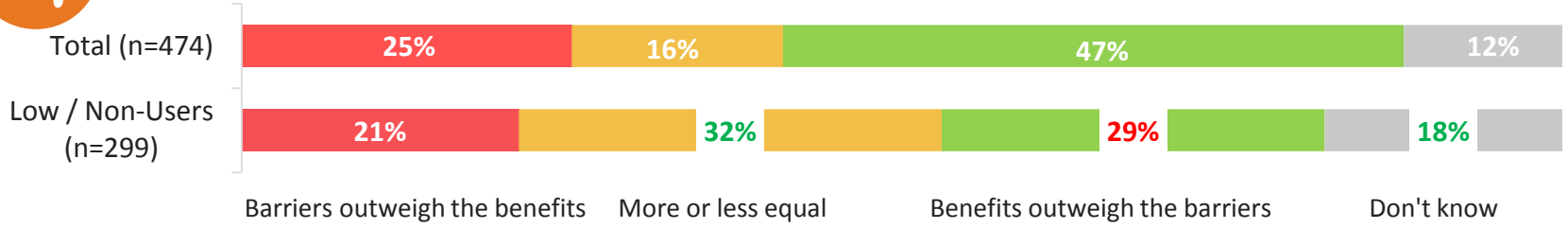
NLQ6: *Thinking about the benefits and barriers towards LED bulbs, please indicate how the benefits currently compare with the barriers for you personally.* ***Base:*** *Those aware of LED bulbs (n=474), Incandescent High Users aware of LED bulbs (n=83)*

BENEFITS VS. BARRIERS – LED LOW / NON-USERS VS. TOTAL

LED low / non-users are more divided, suggesting further work is required to convince them of the long-term *financial* benefits, given they believe they help lower energy costs

How the benefits of LEDs currently compare with barriers

Note: *This wasn't asked in historic research.*



Green is sig. ↑, Red is sig. ↓ than total

Top-3 Barriers

- **43%** (vs. 35% total) It's hard to justify the extra cost of LED bulbs
- **40%** (vs. 33% total) The savings from LED bulbs aren't sufficient enough to pay so much more for them
- **30%** (vs. 25% total) I don't think LED bulbs give me the lighting I need in certain rooms

Top-3 Benefits

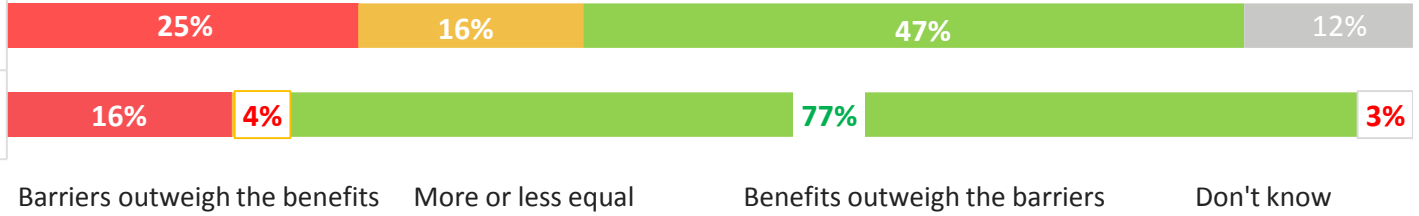
- **64%** (vs. 70% total) I believe that LED bulbs help me lower my energy costs
- **61%** (vs. 68% total) I believe that LED bulbs last longer than traditional bulbs
- **57%** (vs. 61% total) I believe I'm reducing my impact on the environment through efficient energy use

NLQ6: *Thinking about the benefits and barriers towards LED bulbs, please indicate how the benefits currently compare with the barriers for you personally.* ***Base:*** *Those aware of LED bulbs (n=474), LED Low / Non-Users aware of LED bulbs (n=299)*

For LED high users the barriers are small relative to the benefits

How the benefits of LEDs currently compare with barriers

Note: *This wasn't asked in historic research.*



Top 3-Barriers

20% (vs. 35% total) It's hard to justify the extra cost of LED bulbs

18% (vs. 33% total) The savings from LED bulbs aren't sufficient enough to pay so much more for them

18% (vs. 27% total) There aren't any LED bulbs that work in my light fittings

Top-3 Benefits

87% (vs. 70% total) I believe that LED bulbs help me lower my energy costs

83% (vs. 68% total) I believe that LED bulbs last longer than traditional bulbs

80% (vs. 63% total) I believe LED bulbs reduce the hassle of having to change bulbs so frequently

Green is sig. ↑, Red is sig.↓ than total

NLQ6: *Thinking about the benefits and barriers towards LED bulbs, please indicate how the benefits currently compare with the barriers for you personally.* ***Base:*** *Those aware of LED bulbs (n=474), LED High Users (n=97)*

Indicatively the market today is more positive about the benefits of LED bulbs than it was about energy-efficient lighting 4 years ago, particularly in terms of *lighting quality*

Note: We surveyed people in the EECA Consumer Monitor Jul-Sep 2013 using similar statements, but asked in terms of energy-efficient lighting. As a result, wave-on-wave comparisons are indicative only.

Benefits of LED bulbs, % T2B agree it's a benefit on a 5pt scale	2017 (n=474)	Benefits of EE bulbs, % T2B agree it's a benefit on a 5pt scale*	2013* (n=762)	Change
LED bulbs help me lower my energy costs	70%	I believe that EE light bulbs help me lower my energy costs	60%	+10%
LED bulbs last longer than traditional bulbs	68%	I believe that EE bulbs last longer than traditional bulbs	58%	+10%
LED bulbs reduce the hassle of having to change bulbs so frequently	63%	I believe EE light bulbs reduce the hassle of having to change bulbs so frequently	53%	+10%
LED bulbs provide high-quality lighting	61%	I believe EE bulbs provide high-quality lighting	35%	+27%
I'm reducing my impact on the environment through efficient energy use	61%	I'm reducing my impact on the environment through efficient energy use	53%	+8%
I can make savings from using LED bulbs that justifies paying more to purchase them	59%	I can make savings from using EE bulbs that justifies paying more to purchase them	52%	+7%
LED bulbs do not contain toxic materials	54%	Not available	N/A	N/A
LED bulbs last longer and withstand more harsh conditions	53%	Not available	N/A	N/A
LED bulbs can produce a full range of colours	35%	Not available	N/A	N/A

Green is sig. ↑, Red is sig.↓ than 2013

***Note:** Sourced from EECA Consumer Monitor Jul-Sep '13.*

***QLT9:** Please tell us to what extent you feel that these are good reasons for you to buy LED bulbs (2017) / energy-efficient light bulbs (2013)? **Base:** 2017 – Those aware of LED bulbs (n=474), 2013 – Total sample (n=762)*

Indicatively, there's scope to better inform people about the *costs* vs. benefits of LEDs & how to find LEDs that *work with their existing light fittings*

Note: We surveyed people in the EECA Consumer Monitor Jul-Sep 2013 using similar statements, but asked in terms of energy-efficient lighting. As a result, wave-on-wave comparisons are indicative only.

Barriers for LED bulbs, % T2B agree it's a benefit on a 5pt scale	2017 (n=474)	Barriers for EE bulbs, % T2B agree it's a benefit on a 5pt scale*	2013* (n=762)	Change
It's hard to justify the extra cost of LED bulbs	35%	It's hard to justify the extra cost of EE bulbs	25%	+10%
The savings from LED bulbs aren't sufficient enough	33%	The savings from EE bulbs aren't sufficient enough	22%	+11%
There aren't any LED bulbs that work in my light fitting	27%	There aren't any EE bulbs that work in my light fitting	25%	+2%
I don't think LED bulbs give me the lighting I need in certain rooms	25%	I don't think EE bulbs give me the lighting I need in certain rooms	26%	-1%
Shopping for LED bulbs is difficult	25%	Not available	N/A	N/A
LED bulbs don't last as long as claimed	23%	Not available	N/A	N/A
LED bulbs don't put out enough light	22%	EE bulbs don't put out enough light	21%	+1%
It is hard to find a LED bulb that performs as I need	22%	It is hard to find an EE bulb that performs as I need	22%	=
LED bulbs don't look nice in light fittings	19%	Spiral and stick efficient light bulbs don't look nice in light fittings	25%	-6%
Dislike the light produced	19%	I don't like the light that EE bulbs produce	20%	-1%
LED bulbs do not work with my dimmers	18%	Not available	N/A	N/A

Green is sig. ↑, Red is sig.↓ than 2013

***Note:** Sourced from EECA Consumer Monitor Jul-Sep '13.*

***QLT6:** Please tell us to what extent you feel that these are concerns that stop you from buying LED bulbs (2017) / energy-efficient bulbs (2013)? **Base:** 2017 – Those aware of LED bulbs (n=474), 2013 – Total sample (n=762)*

Contacts

Information withheld under section 9(2)(a)





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APPENDIX – PROFILING BULB USERS & CFL USAGE IN THE HOME

58% of the market PROFILE OF INCANDESCENT BULB USERS (I)

Demographically, users of incandescent bulbs are broadly similar to the NZ rep average, but are slightly more likely to be of European ethnicity

Gender	Total (n=502)	I.B. users (n=290)
Male	48%	46%
Female	52%	54%

Age group	Total (n=502)	I.B. users (n=290)
18-29 years	21%	20%
30-39 years	16%	17%
40-49 years	19%	19%
50-64 years	25%	25%
65 years+	19%	19%

Ethnicity	Total (n=502)	I.B. users (n=290)
European	77%	82%
Maori	7%	7%
Pacific	2%	1%
Asian	14%	10%

Type of area	Total (n=502)	I.B. users (n=290)
City	66%	69%
Town	26%	24%
Rural	8%	7%

NZ region	Total (n=502)	I.B. users (n=290)
Auckland	33%	30%
Northern (excl. AKL)	20%	19%
Central	23%	24%
Southern	24%	27%

Home ownership	Total (n=502)	I.B. users (n=290)
Owner	65%	64%
Renter	29%	29%
Other	6%	7%

Annual household income	Total (n=502)	I.B. users (n=290)
Low (up to $60k)	37%	38%
Mid ($60-100k)	23%	24%
High ($100k+)	24%	21%

Household type	Total (n=502)	I.B. users (n=290)
Younger couple, no kids	10%	10%
HH with youngest child under 5yo	12%	12%
HH with youngest child 5-13yo	11%	12%
HH with youngest child 14-17yo	7%	6%
HH with youngest child 18yo+	12%	9%
Older couple, no kids	21%	20%
Living alone	17%	18%
Flatting	9%	11%
Extended family	0%	0%
Others	1%	2%

PROFILE OF INCANDESCENT BULB USERS (II)

Aside from being heavy users of incandescent bulbs, they tend to lag behind the NZ average in terms of LED bulb usage; however, their CFL usage is broadly in line with the national average, albeit few high users

NLQ7a Shopping for light bulbs	Total (n=502)	I.B. users (n=290)
Supermarket	84%	90%
DIY chain store	46%	42%
Lighting specialist	19%	18%

EL9 Light bulb usage	Total (n=502)	I.B. users (n=290)
Incandescent	58%	100%
CFL	65%	66%
LED	50%	41%
Fluorescent	20%	21%
Halogen	34%	38%

EL9 Light bulb consideration	Total (n=502)	I.B. users (n=290)
Incandescent	67%	100%
CFL	80%	85%
LED	79%	74%
Fluorescent	37%	37%
Halogen	55%	59%

NLQ7b Shopping for LED bulbs	Total (n=502)	I.B. users (n=290)
DIY chain store	28%	22%
Supermarket	27%	22%
Lighting specialist	15%	13%

NLQ3 LED usage now vs. 3 years ago	Total (n=502)	I.B. users (n=290)
A lot more	28%	20%
Slightly more	11%	13%
About the same	18%	19%
Slightly less	2%	3%
A lot less	3%	3%
Never used	32%	43%

EL11 LED future intention	Total (n=502)	I.B. users (n=290)
Continue using	43%	47%
Start using / use more	19%	28%
Stop using	4%	4%
Don't know	13%	21%

EL9b Light bulb proportions in the home		Total (n=502)	I.B. users (n=290)
Incandescent	Low / non-users	23%	40%
	Flirt-users	17%	29%
	High-users	18%	31%
CFL	Low / non-users	18%	21%
	Flirt-users	19%	26%
	High-users	28%	19%
LED	Low / non-users	16%	17%
	Flirt-users	16%	16%
	High-users	19%	8%
Fluorescent	Low / non-users	17%	18%
	Flirt-users	2%	2%
	High-users	1%	1%
Halogen	Low / non-users	25%	27%
	Flirt-users	7%	9%
	High-users	3%	2%

Green is sig. ↑, Red is sig.↓ than total

18% of the market PROFILE OF INCANDESCENT BULB HIGH USERS (I)

Demographically, high users of incandescent bulbs are more likely to be younger, renters, flatting & of European ethnicity; they also skew towards being females

Gender	Total (n=502)	I.B high (n=90)
Male	48%	38%
Female	52%	62%

Age group	Total (n=502)	I.B high (n=90)
18-29 years	21%	31%
30-39 years	16%	21%
40-49 years	19%	12%
50-64 years	25%	20%
65 years+	19%	16%

Ethnicity	Total (n=502)	I.B high (n=90)
European	77%	89%
Maori	7%	7%
Pacific	2%	1%
Asian	14%	4%

Type of area	Total (n=502)	I.B high (n=90)
City	66%	66%
Town	26%	27%
Rural	8%	7%

NZ region	Total (n=502)	I.B high (n=90)
Auckland	33%	29%
Northern (excl. AKL)	20%	19%
Central	23%	29%
Southern	24%	23%

Home ownership	Total (n=502)	I.B high (n=90)
Owner	65%	50%
Renter	29%	40%
Other	6%	10%

Annual household income	Total (n=502)	I.B high (n=90)
Low (up to $60k)	37%	36%
Mid ($60-100k)	23%	29%
High ($100k+)	24%	14%

Household type	Total (n=502)	I.B high (n=90)
Younger couple, no kids	10%	12%
HH with youngest child under 5yo	12%	13%
HH with youngest child 5-13yo	11%	11%
HH with youngest child 14-17yo	7%	1%
HH with youngest child 18yo+	12%	11%
Older couple, no kids	21%	12%
Living alone	17%	18%
Flatting	9%	19%
Extended family	0%	0%
Others	1%	2%

Green is sig. ↑, Red is sig.↓ than total

PROFILE OF INCANDESCENT BULB HIGH USERS (II)

High users of incandescent bulbs are less likely to use or consider other types of bulbs, particularly LEDs & CFLs; the majority have never used LEDs before

NLQ7a Shopping for light bulbs	Total (n=502)	I.B high (n=90)
Supermarket	84%	96%
DIY chain store	46%	27%
Lighting specialist	19%	6%

EL9 Light bulb usage	Total (n=502)	I.B high (n=90)
Incandescent	58%	100%
CFL	65%	33%
LED	50%	17%
Fluorescent	20%	8%
Halogen	34%	17%

EL9 Light bulb consideration	Total (n=502)	I.B high (n=90)
Incandescent	67%	100%
CFL	80%	66%
LED	79%	58%
Fluorescent	37%	23%
Halogen	55%	47%

NLQ7b Shopping for LED bulbs	Total (n=502)	I.B high (n=90)
DIY chain store	28%	7%
Supermarket	27%	9%
Lighting specialist	15%	3%

NLQ3 LED usage now vs. 3 years ago	Total (n=502)	I.B high (n=90)
A lot more	28%	8%
Slightly more	11%	6%
About the same	18%	9%
Slightly less	2%	2%
A lot less	3%	4%
Never used	32%	63%

EL11 LED future intention	Total (n=502)	I.B high (n=90)
Continue using	43%	13%
Start using / use more	19%	16%
Stop using	4%	1%
Don't know	13%	28%

EL9b Light bulb proportions in the home		Total (n=502)	I.B high (n=90)
Incandescent	Low / non-users	23%	0%
	Flirt-users	17%	0%
	High-users	18%	100%
CFL	Low / non-users	18%	22%
	Flirt-users	19%	8%
	High-users	28%	3%
LED	Low / non-users	16%	93%
	Flirt-users	16%	4%
	High-users	19%	2%
Fluorescent	Low / non-users	17%	6%
	Flirt-users	2%	1%
	High-users	1%	1%
Halogen	Low / non-users	25%	13%
	Flirt-users	7%	2%
	High-users	3%	1%

Green is sig. ↑, Red is sig.↓ than total

Demographically, LED users are more likely to be home owners living in higher-income households

Gender	Total (n=502)	LED users (n=253)
Male	48%	53%
Female	52%	47%

Age group	Total (n=502)	LED users (n=253)
18-29 years	21%	19%
30-39 years	16%	15%
40-49 years	19%	18%
50-64 years	25%	28%
65 years+	19%	20%

Ethnicity	Total (n=502)	LED users (n=253)
European	77%	74%
Maori	7%	7%
Pacific	2%	1%
Asian	14%	17%

Type of area	Total (n=502)	LED users (n=253)
City	66%	66%
Town	26%	25%
Rural	8%	9%

NZ region	Total (n=502)	LED users (n=253)
Auckland	33%	37%
Northern (excl. AKL)	20%	19%
Central	23%	19%
Southern	24%	25%

Home ownership	Total (n=502)	LED users (n=253)
Owner	65%	**75%**
Renter	29%	**19%**
Other	6%	6%

Annual household income	Total (n=502)	LED users (n=253)
Low (up to $60k)	37%	**27%**
Mid ($60-100k)	23%	25%
High ($100k+)	24%	**34%**

Household type	Total (n=502)	LED users (n=253)
Younger couple, no kids	10%	9%
HH with youngest child under 5yo	12%	13%
HH with youngest child 5-13yo	11%	12%
HH with youngest child 14-17yo	7%	8%
HH with youngest child 18yo+	12%	15%
Older couple, no kids	21%	25%
Living alone	17%	**9%**
Flatting	9%	6%
Extended family	0%	1%
Others	1%	2%

Green is sig. ↑, Red is sig.↓ than total

PROFILE OF LED BULB USERS (II)

Aside from being heavier users of LED bulbs, they're more likely to continue using LEDs & usage has increased a lot in the past 3 years; they're less likely to use incandescent & CFL bulbs

NLQ7a Shopping for light bulbs	Total (n=502)	LED users (n=253)
Supermarket	84%	76%
DIY chain store	46%	57%
Lighting specialist	19%	29%

EL9 Light bulb usage	Total (n=502)	LED users (n=253)
Incandescent	58%	47%
CFL	65%	57%
LED	50%	100%
Fluorescent	20%	28%
Halogen	34%	44%

EL9 Light bulb consideration	Total (n=502)	LED users (n=253)
Incandescent	67%	58%
CFL	80%	75%
LED	79%	100%
Fluorescent	37%	43%
Halogen	55%	60%

NLQ7b Shopping for LED bulbs	Total (n=502)	LED users (n=253)
Supermarket	28%	56%
DIY chain store	27%	54%
Lighting specialist	15%	29%

NLQ3 LED usage now vs. 3 years ago	Total (n=502)	LED users (n=253)
A lot more	28%	54%
Slightly more	11%	17%
About the same	18%	24%
Slightly less	2%	2%
A lot less	3%	2%

EL11 LED future intention	Total (n=502)	LED users (n=253)
Continue using	43%	81%
Start using / use more	19%	13%
Stop using	4%	3%
Don't know	13%	4%

EL9b Light bulb proportions in the home		Total (n=502)	LED users (n=253)
Incandescent	Low / non-users	23%	26%
	Flirt-users	17%	15%
	High-users	18%	6%
CFL	Low / non-users	18%	21%
	Flirt-users	19%	18%
	High-users	28%	18%
LED	Low / non-users	16%	31%
	Flirt-users	16%	31%
	High-users	19%	38%
Fluorescent	Low / non-users	17%	24%
	Flirt-users	2%	2%
	High-users	1%	2%
Halogen	Low / non-users	25%	33%
	Flirt-users	7%	8%
	High-users	3%	3%

Green is sig. ↑, Red is sig.↓ than total

PROFILE OF LED LOW USERS (I)

Demographically, LED low users are more likely to live in mid-income households & are generally more likely to be females & homeowners

Gender	Total (n=502)	LED low (n=76)
Male	48%	41%
Female	52%	59%

Age group	Total (n=502)	LED low (n=76)
18-29 years	21%	20%
30-39 years	16%	17%
40-49 years	19%	18%
50-64 years	25%	27%
65 years+	19%	18%

Ethnicity	Total (n=502)	LED low (n=76)
European	77%	79%
Maori	7%	5%
Pacific	2%	1%
Asian	14%	16%

Type of area	Total (n=502)	LED low (n=76)
City	66%	68%
Town	26%	20%
Rural	8%	12%

NZ region	Total (n=502)	LED low (n=76)
Auckland	33%	35%
Northern (excl. AKL)	20%	21%
Central	23%	18%
Southern	24%	26%

Home ownership	Total (n=502)	LED low (n=76)
Owner	65%	72%
Renter	29%	25%
Other	6%	3%

Annual household income	Total (n=502)	LED low (n=76)
Low (up to $60k)	37%	**22%**
Mid ($60-100k)	23%	32%
High ($100k+)	24%	33%

Household type	Total (n=502)	LED low (n=76)
Younger couple, no kids	10%	8%
HH with youngest child under 5yo	12%	17%
HH with youngest child 5-13yo	11%	13%
HH with youngest child 14-17yo	7%	5%
HH with youngest child 18yo+	12%	13%
Older couple, no kids	21%	26%
Living alone	17%	9%
Flatting	9%	8%
Extended family	0%	1%
Others	1%	0%

Green is sig. ↑, Red is sig.↓ than total

PROFILE OF LED LOW USERS (II)

LED low users are more likely to use fluorescent & halogen bulbs & are more likely to be high users of CFLs; over the past 3 years LED usage is about the same to slightly more, while the majority plan to continue using LEDs

NLQ7a Shopping for light bulbs	Total (n=502)	LED low (n=76)
Supermarket	84%	91%
DIY chain store	46%	53%
Lighting specialist	19%	25%

EL9 Light bulb usage	Total (n=502)	LED low (n=76)
Incandescent	58%	63%
CFL	65%	74%
LED	50%	100%
Fluorescent	20%	34%
Halogen	34%	58%

EL9 Light bulb consideration	Total (n=502)	LED low (n=76)
Incandescent	67%	72%
CFL	80%	89%
LED	79%	100%
Fluorescent	37%	46%
Halogen	55%	72%

NLQ7b Shopping for LED bulbs	Total (n=502)	LED low (n=76)
Supermarket	28%	55%
DIY chain store	27%	62%
Lighting specialist	15%	24%

NLQ3 LED usage now vs. 3 years ago	Total (n=502)	LED low (n=76)
A lot more	28%	29%
Slightly more	11%	24%
About the same	18%	39%
Slightly less	2%	3%
A lot less	3%	4%

EL11 LED future intention	Total (n=502)	LED low (n=76)
Continue using	43%	71%
Start using / use more	19%	17%
Stop using	4%	5%
Don't know	13%	7%

EL9b Light bulb proportions in the home		Total (n=502)	LED low (n=76)
Incandescent	Low / non-users	23%	32%
	Flirt-users	17%	20%
	High-users	18%	12%
CFL	Low / non-users	18%	17%
	Flirt-users	19%	13%
	High-users	28%	43%
LED	Low / non-users	16%	100%
	Flirt-users	16%	0%
	High-users	19%	0%
Fluorescent	Low / non-users	17%	28%
	Flirt-users	2%	3%
	High-users	1%	4%
Halogen	Low / non-users	25%	46%
	Flirt-users	7%	4%
	High-users	3%	8%

Green is sig. ↑, Red is sig.↓ than total

PROFILE OF LED LOW & NON-USERS (I)

Demographically, LED low / non-users are more likely to be renters; they're also generally more likely to be female & living in lower-income households

Gender	Total (n=502)	LED low / non (n=327)
Male	48%	43%
Female	52%	57%

Age group	Total (n=502)	LED low / non (n=327)
18-29 years	21%	22%
30-39 years	16%	17%
40-49 years	19%	20%
50-64 years	25%	23%
65 years+	19%	18%

Ethnicity	Total (n=502)	LED low / non (n=327)
European	77%	80%
Maori	7%	6%
Pacific	2%	2%
Asian	14%	12%

Type of area	Total (n=502)	LED low / non (n=327)
City	66%	67%
Town	26%	25%
Rural	8%	8%

NZ region	Total (n=502)	LED low / non (n=327)
Auckland	33%	30%
Northern (excl. AKL)	20%	22%
Central	23%	24%
Southern	24%	24%

Home ownership	Total (n=502)	LED low / non (n=327)
Owner	65%	59%
Renter	29%	36%
Other	6%	5%

Annual household income	Total (n=502)	LED low / non (n=327)
Low (up to $60k)	37%	42%
Mid ($60-100k)	23%	23%
High ($100k+)	24%	19%

Household type	Total (n=502)	LED low / non (n=327)
Younger couple, no kids	10%	10%
HH with youngest child under 5yo	12%	12%
HH with youngest child 5-13yo	11%	11%
HH with youngest child 14-17yo	7%	6%
HH with youngest child 18yo+	12%	9%
Older couple, no kids	21%	18%
Living alone	17%	21%
Flatting	9%	12%
Extended family	0%	0%
Others	1%	1%

Green is sig. ↑, Red is sig.↓ than total

PROFILE OF LED LOW & NON-USERS (II)

LED low / non-users are more likely to shop for bulbs at the supermarket, they're more likely to use, consider & be high users of incandescent & CFL bulbs; they are also more likely to have never used LEDs before

NLQ7a Shopping for light bulbs	Total (n=502)	LED low / non (n=327)
Supermarket	84%	92%
DIY chain store	46%	40%
Lighting specialist	19%	13%

EL9 Light bulb usage	Total (n=502)	LED low / non (n=327)
Incandescent	58%	67%
CFL	65%	73%
LED	50%	24%
Fluorescent	20%	17%
Halogen	34%	32%

EL9 Light bulb consideration	Total (n=502)	LED low / non (n=327)
Incandescent	67%	75%
CFL	80%	87%
LED	79%	68%
Fluorescent	37%	34%
Halogen	55%	55%

NLQ7b Shopping for LED bulbs	Total (n=502)	LED low / non (n=327)
Supermarket	28%	13%
DIY chain store	27%	14%
Lighting specialist	15%	6%

NLQ3 LED usage now vs. 3 years ago	Total (n=502)	LED low / non (n=327)
A lot more	28%	8%
Slightly more	11%	10%
About the same	18%	18%
Slightly less	2%	3%
A lot less	3%	5%
Never used	32%	49%

EL11 LED future intention	Total (n=502)	LED low / non (n=327)
Continue using	43%	21%
Start using / use more	19%	23%
Stop using	4%	5%
Don't know	13%	19%

EL9b Light bulb proportions in the home		Total (n=502)	LED low / non (n=327)
Incandescent	Low / non-users	23%	23%
	Flirt-users	17%	18%
	High-users	18%	26%
CFL	Low / non-users	18%	15%
	Flirt-users	19%	18%
	High-users	28%	40%
LED	Low / non-users	16%	100%
	Flirt-users	16%	0%
	High-users	19%	0%
Fluorescent	Low / non-users	17%	14%
	Flirt-users	2%	2%
	High-users	1%	1%
Halogen	Low / non-users	25%	24%
	Flirt-users	7%	5%
	High-users	3%	4%

Green is sig. ↑, Red is sig.↓ than total

16% of the market PROFILE OF LED FLIRT USERS (I)

Demographically, LED flirts are more likely to be males, homeowners & living in higher-income households; they're also generally more likely be aged 40-49 & living in households with school-aged kids

Gender	Total (n=502)	LED flirts (n=78)
Male	48%	64%
Female	52%	36%

Age group	Total (n=502)	LED flirts (n=78)
18-29 years	21%	18%
30-39 years	16%	10%
40-49 years	19%	26%
50-64 years	25%	27%
65 years+	19%	19%

Ethnicity	Total (n=502)	LED flirts (n=78)
European	77%	68%
Maori	7%	6%
Pacific	2%	1%
Asian	14%	15%

Type of area	Total (n=502)	LED flirts (n=78)
City	66%	71%
Town	26%	21%
Rural	8%	9%

NZ region	Total (n=502)	LED flirts (n=78)
Auckland	33%	42%
Northern (excl. AKL)	20%	14%
Central	23%	15%
Southern	24%	28%

Home ownership	Total (n=502)	LED flirts (n=78)
Owner	65%	80%
Renter	29%	14%
Other	6%	6%

Annual household income	Total (n=502)	LED flirts (n=78)
Low (up to $60k)	37%	28%
Mid ($60-100k)	23%	21%
High ($100k+)	24%	36%

Household type	Total (n=502)	LED flirts (n=78)
Younger couple, no kids	10%	3%
HH with youngest child under 5yo	12%	13%
HH with youngest child 5-13yo	11%	17%
HH with youngest child 14-17yo	7%	12%
HH with youngest child 18yo+	12%	12%
Older couple, no kids	21%	24%
Living alone	17%	12%
Flatting	9%	6%
Extended family	0%	0%
Others	1%	3%

Green is sig. ↑, Red is sig.↓ than total

PROFILE OF LED FLIRT USERS (II)

LED flirts are more likely to be users of halogen bulbs; most are using LEDs slightly to a lot more compared with 3 years ago & most intend to continue using LEDs

NLQ7a Shopping for light bulbs	Total (n=502)	LED flirts (n=78)
Supermarket	84%	81%
DIY chain store	46%	55%
Lighting specialist	19%	28%

EL9 Light bulb usage	Total (n=502)	LED flirts (n=78)
Incandescent	58%	60%
CFL	65%	67%
LED	50%	100%
Fluorescent	20%	28%
Halogen	34%	53%

EL9 Light bulb consideration	Total (n=502)	LED flirts (n=78)
Incandescent	67%	68%
CFL	80%	83%
LED	79%	100%
Fluorescent	37%	49%
Halogen	55%	69%

NLQ7b Shopping for LED bulbs	Total (n=502)	LED flirts (n=78)
Supermarket	28%	51%
DIY chain store	27%	59%
Lighting specialist	15%	29%

NLQ3 LED usage now vs. 3 years ago	Total (n=502)	LED flirts (n=78)
A lot more	28%	49%
Slightly more	11%	26%
About the same	18%	21%
Slightly less	2%	3%
A lot less	3%	1%

EL11 LED future intention	Total (n=502)	LED flirts (n=78)
Continue using	43%	78%
Start using / use more	19%	18%
Stop using	4%	3%
Don't know	13%	1%

EL9b Light bulb proportions in the home		Total (n=502)	LED flirts (n=78)
Incandescent	Low / non-users	23%	28%
	Flirt-users	17%	27%
	High-users	18%	5%
CFL	Low / non-users	18%	17%
	Flirt-users	19%	37%
	High-users	28%	13%
LED	Low / non-users	16%	0%
	Flirt-users	16%	100%
	High-users	19%	0%
Fluorescent	Low / non-users	17%	23%
	Flirt-users	2%	5%
	High-users	1%	0%
Halogen	Low / non-users	25%	36%
	Flirt-users	7%	17%
	High-users	3%	0%

Green is sig. ↑, Red is sig.↓ than total

19% of the market PROFILE OF LED HIGH USERS (I)

Demographically, LED high users are more likely to live in households with adult children; they also generally skew towards being male, aged 50+, Asian ethnicity, homeowners, higher-income households & empty-nesters

Gender	Total (n=502)	LED high (n=97)
Male	48%	53%
Female	52%	47%

Age group	Total (n=502)	LED high (n=97)
18-29 years	21%	21%
30-39 years	16%	19%
40-49 years	19%	11%
50-64 years	25%	28%
65 years+	19%	22%

Ethnicity	Total (n=502)	LED high (n=97)
European	77%	73%
Maori	7%	8%
Pacific	2%	1%
Asian	14%	21%

Type of area	Total (n=502)	LED high (n=97)
City	66%	59%
Town	26%	33%
Rural	8%	8%

NZ region	Total (n=502)	LED high (n=97)
Auckland	33%	34%
Northern (excl. AKL)	20%	20%
Central	23%	23%
Southern	24%	23%

Home ownership	Total (n=502)	LED high (n=97)
Owner	65%	74%
Renter	29%	19%
Other	6%	7%

Annual household income	Total (n=502)	LED high (n=97)
Low (up to $60k)	37%	30%
Mid ($60-100k)	23%	25%
High ($100k+)	24%	32%

Household type	Total (n=502)	LED high (n=97)
Younger couple, no kids	10%	15%
HH with youngest child under 5yo	12%	10%
HH with youngest child 5-13yo	11%	7%
HH with youngest child 14-17yo	7%	6%
HH with youngest child 18yo+	12%	21%
Older couple, no kids	21%	27%
Living alone	17%	7%
Flatting	9%	4%
Extended family	0%	1%
Others	1%	2%

Green is sig. ↑, Red is sig.↓ than total

19% of the market PROFILE OF LED HIGH USERS (II)

LED high users are less likely to use incandescent or CFL bulbs & are more likely to shop for their bulbs at DIY chain stores or lighting specialists; most are using LEDs a lot more than 3 years ago & the vast majority will continue using LEDs

NLQ7a Shopping for light bulbs	Total (n=502)	LED high (n=97)
Supermarket	84%	61%
DIY chain store	46%	62%
Lighting specialist	19%	33%

EL9 Light bulb usage	Total (n=502)	LED high (n=97)
Incandescent	58%	25%
CFL	65%	36%
LED	50%	100%
Fluorescent	20%	24%
Halogen	34%	27%

EL9 Light bulb consideration	Total (n=502)	LED high (n=97)
Incandescent	67%	38%
CFL	80%	56%
LED	79%	100%
Fluorescent	37%	35%
Halogen	55%	43%

NLQ7b Shopping for LED bulbs	Total (n=502)	LED high (n=97)
Supermarket	28%	60%
DIY chain store	27%	44%
Lighting specialist	15%	34%

NLQ3 LED usage now vs. 3 years ago	Total (n=502)	LED high (n=97)
A lot more	28%	79%
Slightly more	11%	5%
About the same	18%	14%
Slightly less	2%	0%
A lot less	3%	1%

EL11 LED future intention	Total (n=502)	LED high (n=97)
Continue using	43%	91%
Start using / use more	19%	6%
Stop using	4%	0%
Don't know	13%	3%

EL9b Light bulb proportions in the home		Total (n=502)	LED high (n=97)
Incandescent	Low / non-users	23%	20%
	Flirt-users	17%	3%
	High-users	18%	2%
CFL	Low / non-users	18%	28%
	Flirt-users	19%	6%
	High-users	28%	2%
LED	Low / non-users	16%	0%
	Flirt-users	16%	0%
	High-users	19%	100%
Fluorescent	Low / non-users	17%	23%
	Flirt-users	2%	0%
	High-users	1%	1%
Halogen	Low / non-users	25%	22%
	Flirt-users	7%	4%
	High-users	3%	1%

Green is sig. ↑, Red is sig.↓ than total

CFL USAGE BY ROOMS

CFLs are more often used in the *bedrooms*, *lounge / living areas*, *kitchen / dining areas* & *hallways*, which are often higher-usage areas; usage is often lower in *bathrooms* & *outdoors*, which are often lower-usage areas

CFL bulb usage by room type

	Bedrooms	Lounge / living	Kitchen	Bathrooms	Hallways	Other rooms	Outdoors
Virtually all of them	31%	33%	29%	24%	29%	24%	16%
Most of them	11%	10%	9%	10%	9%	10%	6%
Around half of them	9%	9%	8%	7%	4%	6%	5%
About a quarter of them	6%	7%	6%	4%	6%	5%	3%
Only a few	20%	16%	16%	16%	19%	24%	17%
None	21%	23%	29%	35%	26%	26%	40%
Don't know	1%	0%	1%	1%	1%	1%	3%
Not applicable	1%	2%	2%	3%	6%	4%	10%

***NLQ1:** Can you tell us about the proportion of **CFL bulbs** you use in?*
***Base:** CFL bulb users (n=327)*

JULY 2018

EECA-Led LineTrust Evaluation

PREPARED FOR: EECA

PREPARED BY: IPSOS

CONTACT: INFORMATION WITHHELD UNDER SECTION 9(2)(A)

GAME CHANGERS

Table of Contents

EXECUTIVE SUMMARY

- **Overall, the campaign can be considered a success.** The vast majority of people felt this was a worthwhile initiative, while the offer has led to an increase in intended uptake of LED bulbs and experiences using the bulbs have been predominantly positive.
- **Reaction to the LED bulbs among First-Time LED Users was particularly positive.** First-Time LED Users strongly felt this was a worthwhile initiative and were more likely to believe that LED bulbs *provide high-quality lighting*, which perhaps is a feature that can be mentioned in communications.
- **Encouraging the trial of LED bulbs is a key aspect of promoting the uptake of LED lighting.** First-Time LED Users and Existing LED Users rated LEDs much more positively than LED Non-Users. Future campaigns should focus on challenging LED Non-Users to switch light bulb types and communicating how non-LED lightbulbs waste money.
- **Undersupply of light bulbs was an issue preventing some people from redeeming the offer.** This is reflected by the fact that over a third of Non-Redeemers did not redeem because LineTrust had run out of light bulbs by the time they arrived. Given the appetite for the offer, having sufficient supplies available goes without saying.

RESEARCH OBJECTIVES AND METHODOLOGY

Why and how we're conducting this research

RESEARCH BACKGROUND AND OBJECTIVES

- In April 2018 EECA worked with LineTrust South Canterbury on a promotion to offer customers five Ecobulb LED light bulbs for free. There was a two-day window on 27th and 28th April to collect them, and in the end all of the available 45,000 led bulbs were given out to local customers.

This study examines the following:

- How successful this approach was in getting people to install LED light bulbs in their homes and the benefits arising as a result.
- To what extent this approach has reached people who have not tried LED light bulbs before, and the reactions of people who have now tried the bulbs.

RESEARCH METHODOLOGY

- A CATI survey of 300 household ratepayers accessed by a telephone list was conducted in the South Canterbury region.
- Interviews were completed from 21st to 29th June 2018 with an average interview duration of 11 minutes.
- The margin of error on a sample size of 300 is ±5.66%. For the NZ population the figure used is 4,887,740 from the Statistics NZ estimate as at 2nd July 2018.

SAMPLE PROFILE

We interviewed the following people…

(n=300)
respondents

13 minutes
average duration

48% Male

52% Female

6% 25-44 years

36% 45-64 years

58% 65+ years

Redemption Type
- **45%** Non-Redeemers
- **43%** Redeem and Use
- **12%** Redeem and Not Use

Living arrangement
- **98%** Homeowner
- **2%** Renter
- **0%** Other living arrangements

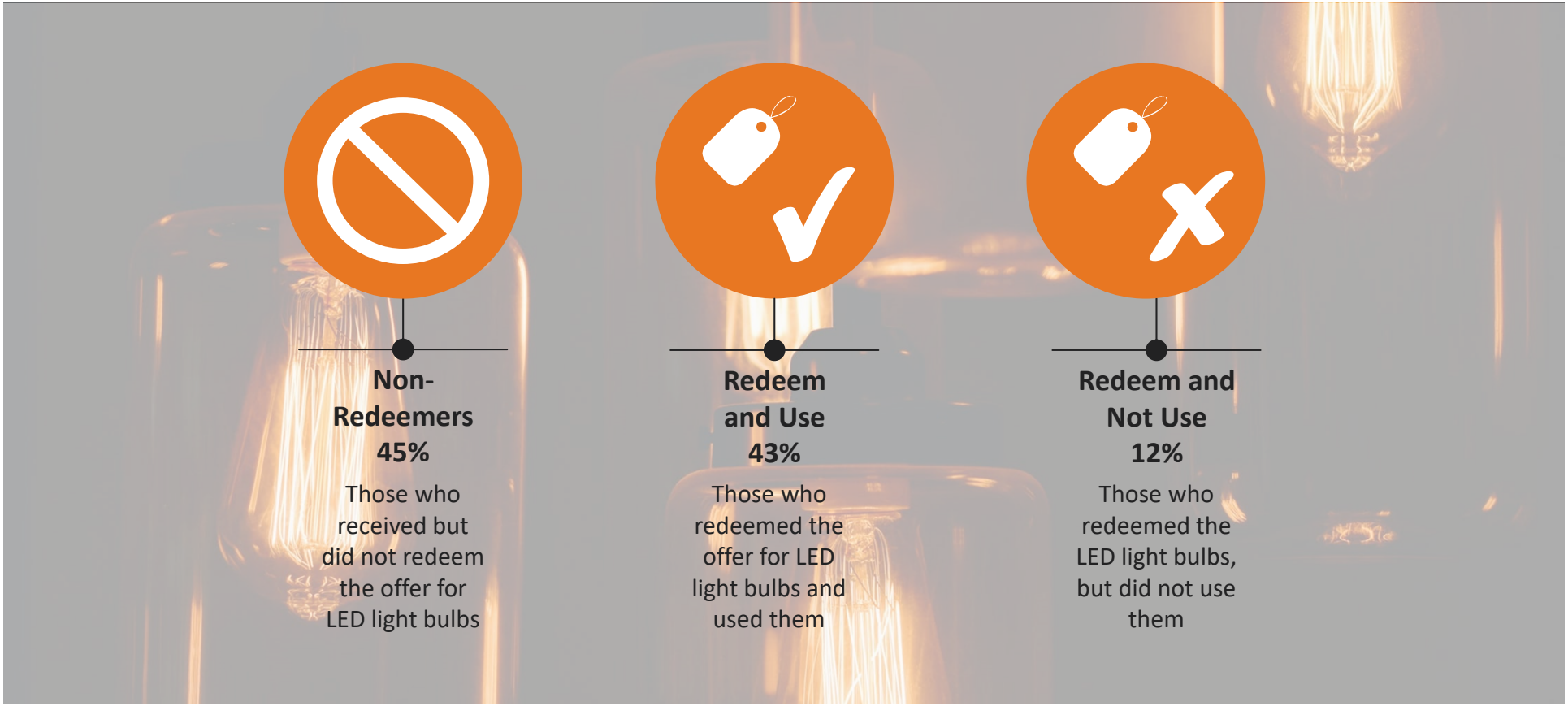
Area
- **83%** City or town
- **17%** Rural area

Income
- **50%** $60,000 or less
- **11%** $60,001 to $70,000
- **14%** $70,001 to $100,000
- **8%** $100,001 to $120,000
- **4%** $120,001 to $140,000
- **3%** $140,001 or more
- **10%** Don't know / Refused

Household type
- **20%** Household with children
- **25%** Single / one-person household
- **1%** In a flatting arrangement
- **53%** Older couple, no kids at home
- **0%** Younger couple without kids
- **1%** Other

SEGMENTS

Redemption type segments



Non-Redeemers 45%

Those who received but did not redeem the offer for LED light bulbs

Redeem and Use 43%

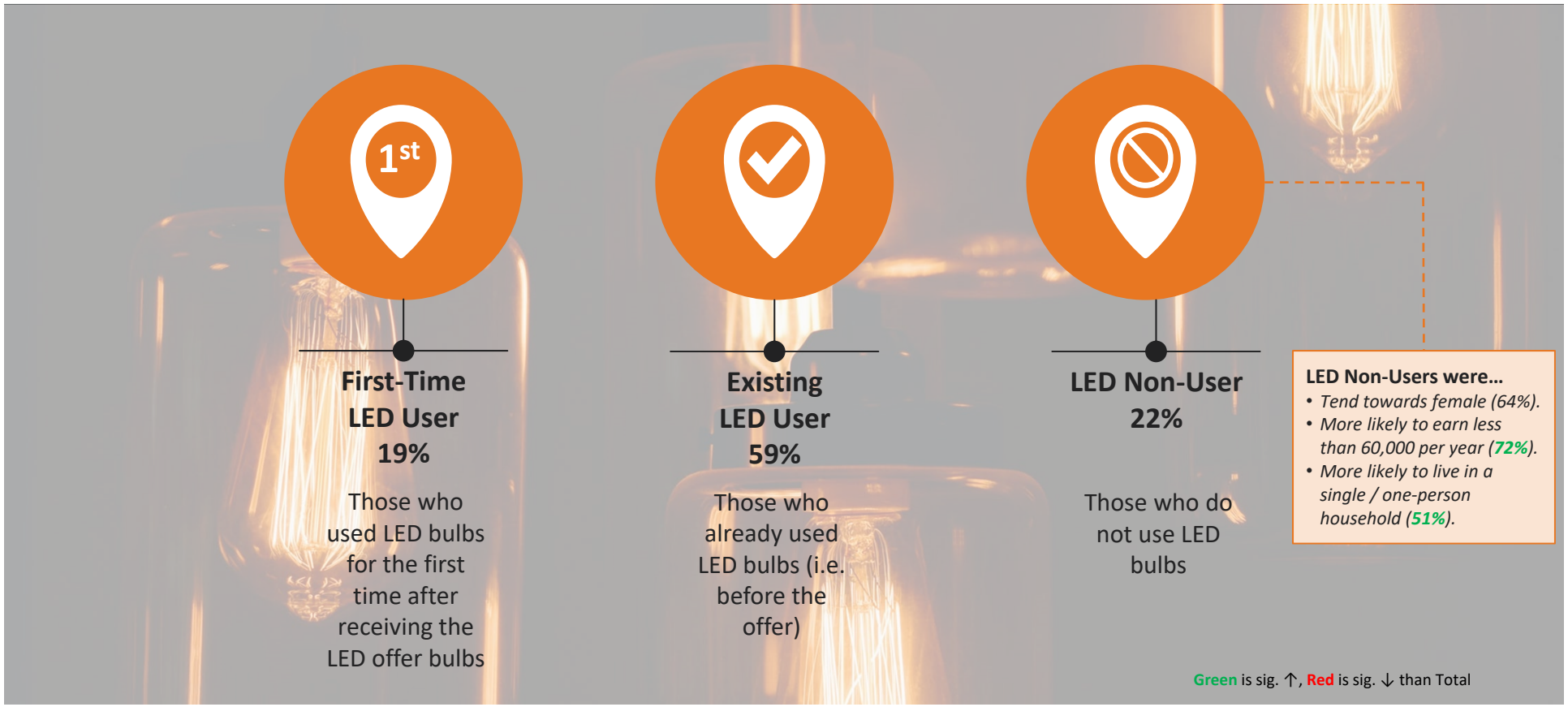
Those who redeemed the offer for LED light bulbs and used them

Redeem and Not Use 12%

Those who redeemed the LED light bulbs, but did not use them

SEGMENTS

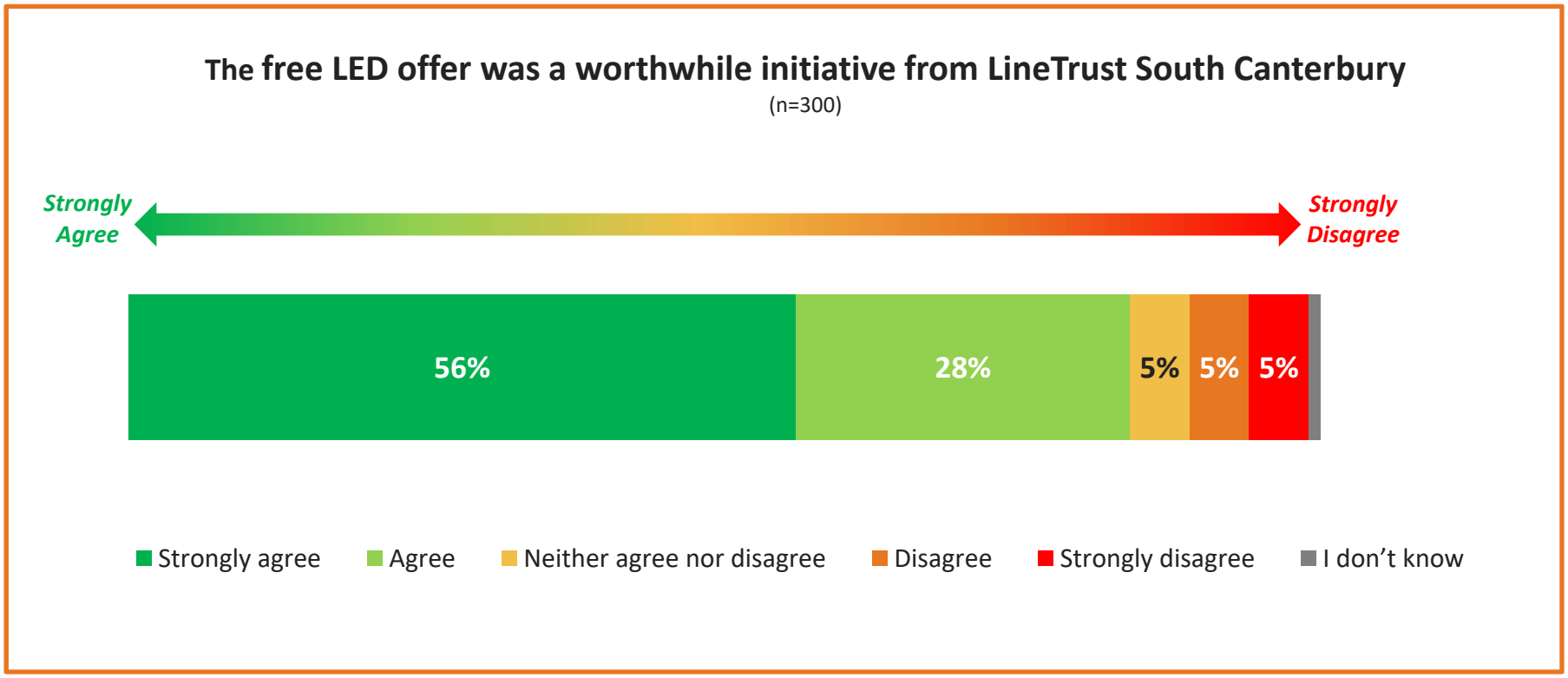
LED user status segments



OVERALL EVALUATION OF THE LED LINETRUST OFFER

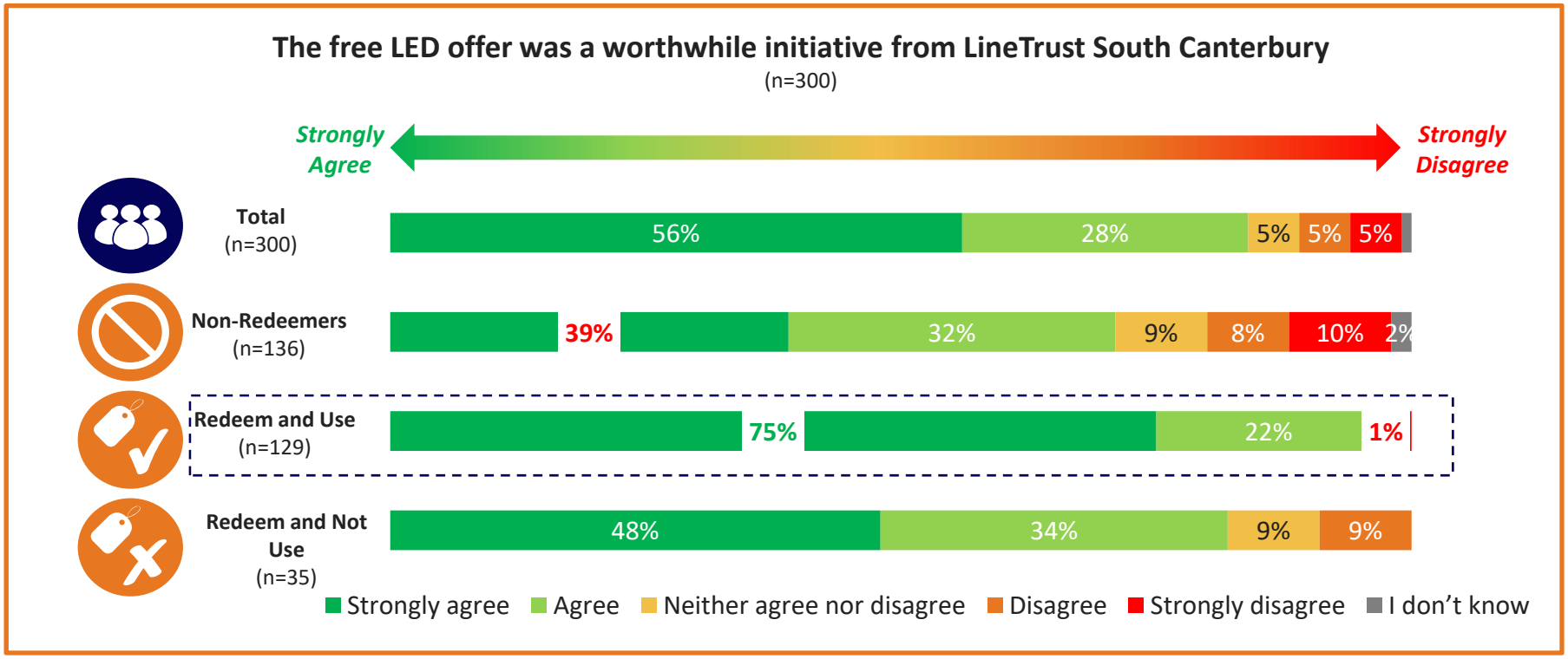
OVERALL EVALUATION

Overall, most believe that the free LED offer was a worthwhile initiative



OE1: *To what extent do you agree or disagree that this free LED offer was a worthwhile initiative from LineTrust South Canterbury?*
Base: *Total sample (n=300)*

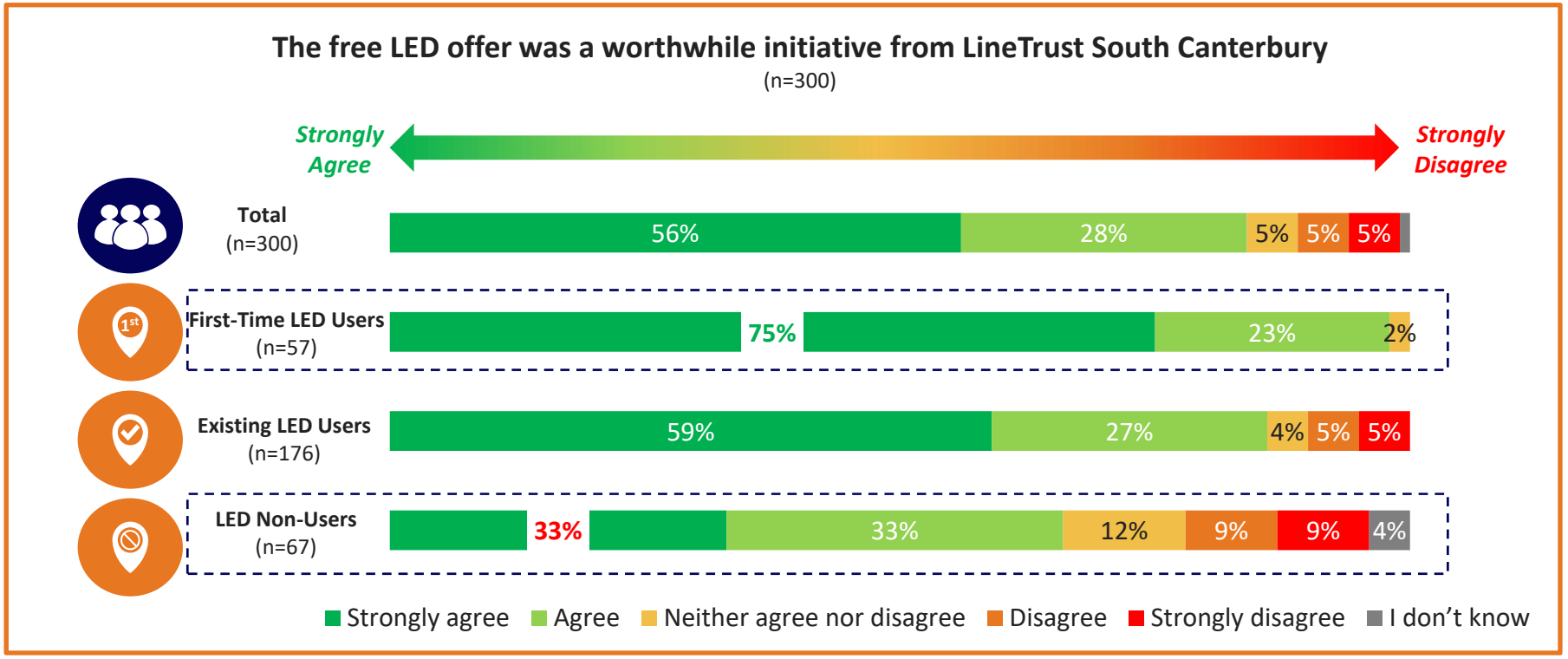
Those who redeemed and used the LEDs were more likely to strongly agree that the free LED offer was worthwhile



Green is sig. ↑, Red is sig. ↓ than Total

OE1: To what extent do you agree or disagree that this free LED offer was a worthwhile initiative from LineTrust South Canterbury?
Base: Total sample (n=300)

First-Time LED Users had a particularly favourable view on the initiative, while LED Non-Users were less likely to believe it was worthwhile



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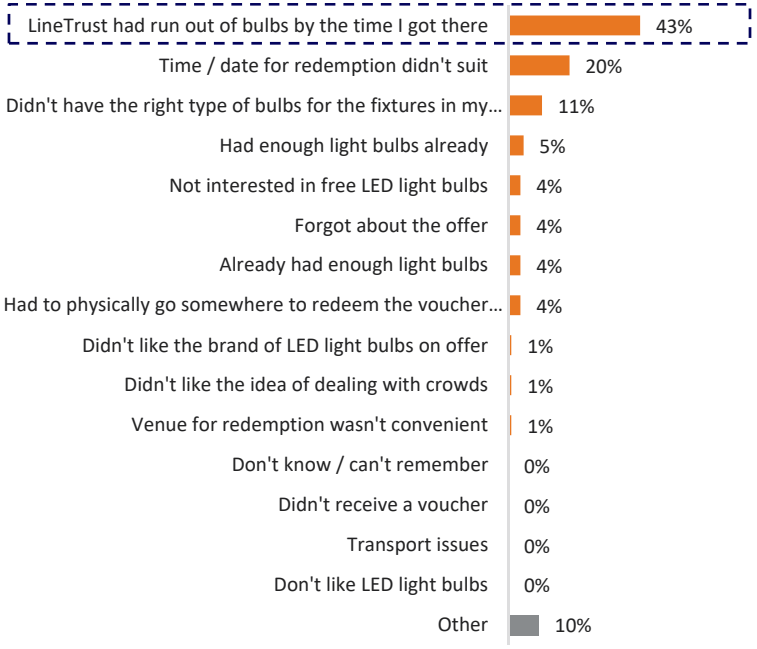
OE1: To what extent do you agree or disagree that this free LED offer was a worthwhile initiative from LineTrust South Canterbury?

Base: Total sample (n=300)

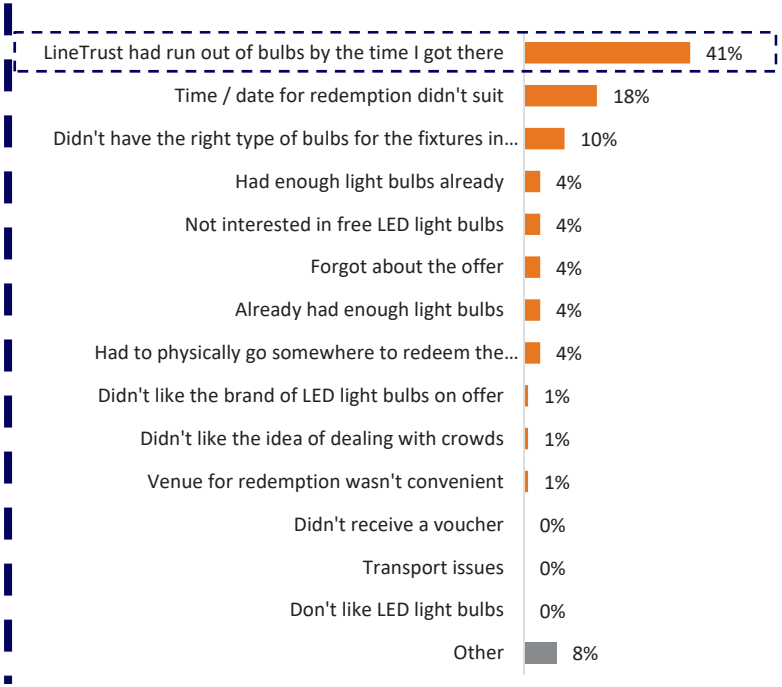
The main reason Non-Redeemers did not take up the offer was a *lack of supply*

Non-Redeemers

Why Non-Redeemers didn't take up the offer



The <u>main reason</u> Non-Redeemers didn't take up the offer



NR1: *Can you tell me why you did not take up the offer for free LED light bulbs?* / ***NR2:*** *And can you tell me the main reason why you did not take up the offer?*

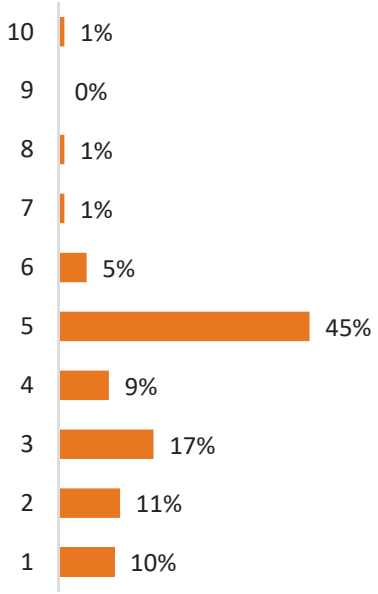
Base: *Non-Redeemers (n=136)*

GAME CHANGERS

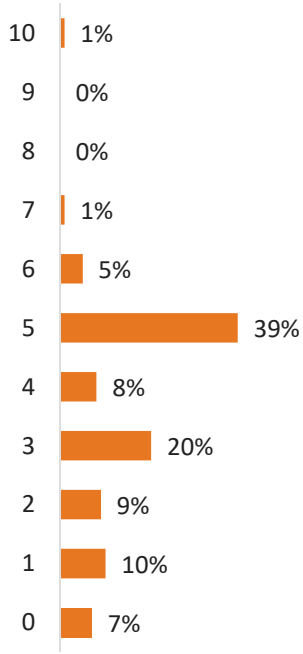
There has been an encouraging response amongst redeem and use, with a high rate of LED bulbs replacing non-LED bulbs in high-usage rooms

Redeem and Use

Light bulbs replaced with new LED bulbs

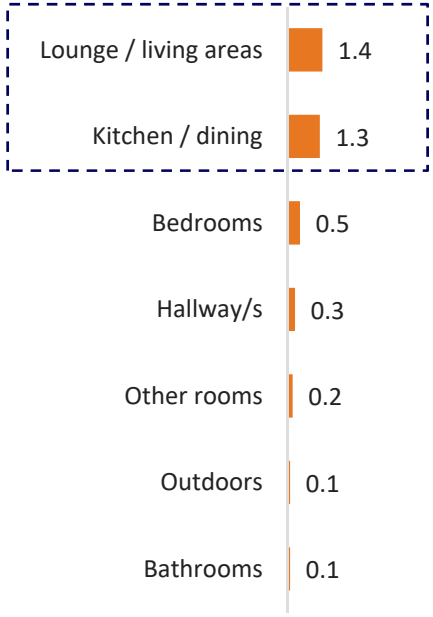


LED bulbs replacing non-LED light bulbs



Room / area where LED bulbs were placed

(Mean Score)



RU2: *How many light bulbs have you replaced with the new LED light bulbs you received? /* ***RU3:*** *And how many of those LED light bulbs replaced non-LED light bulbs in your home? /* ***RU4:*** *Which room(s) or area(s) of your home did you put those new LED light bulbs, and how many bulbs did you put in each room?*

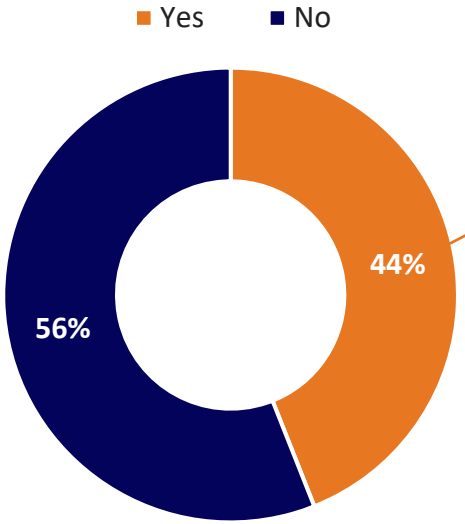
Base: *Redeem and Use (n=129)*

GAME CHANGERS

Just under half of those who used the LED bulbs did so for the first time, with most of these respondents having a positive experience

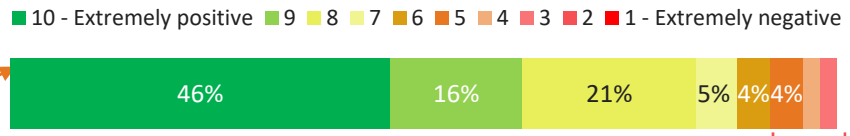
Redeem and Use

First time using LED lighting?



Those who answered 'Yes'

Experience of first time using LED lighting



It sounds like you haven't had a particularly positive experience with your new LED light bulbs, can you tell me how come that's the case?

- *"With one LED being faulty (blinking), this has influenced my thinking about them."*
- *"They didn't have the size wattage. They only had the one size 9 watt, which was equivalent to a 100W incandescent bulb, which wasn't correct to what they are comparing to."*
- *"Two have burnt out already."*

RU5: *Was this the first time you've used LED lighting in your home?* ***Base:*** *Redeem and Use (n=129)*

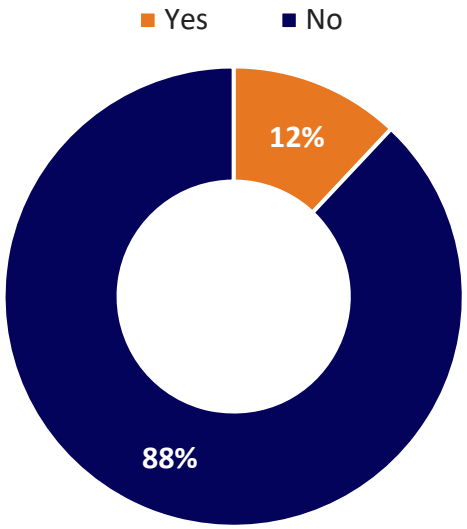
RU6: *Given this was the first time you've used LED lighting in your home, how positive or negative has your experience been with using them?*
Base: *First-Time LED Users (n=57)*

RU7: *It sounds like you haven't had a particularly positive experience with your new LED light bulbs, can you tell me how come that's the case?*
Base: *First-Time LED Users who had a negative experience (n=4)*

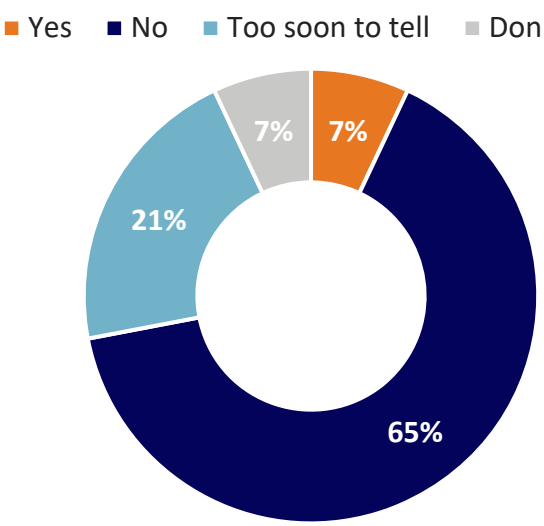
Only a small portion of those who used the LED bulbs experienced issues with them, while the majority did not see a reduction in their power bill

Redeem and Use

Experienced issues with new LED light bulbs?



Noticed a reduction in your power bill?

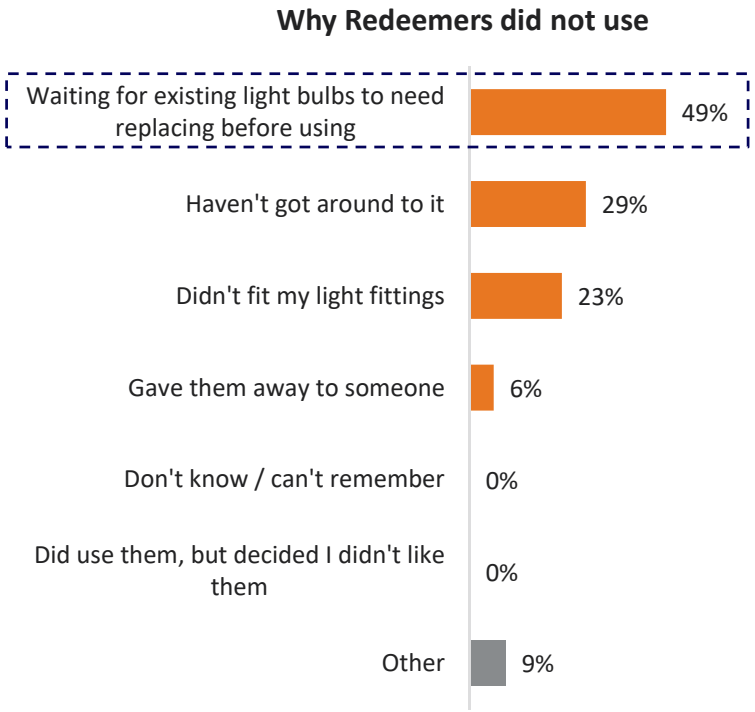


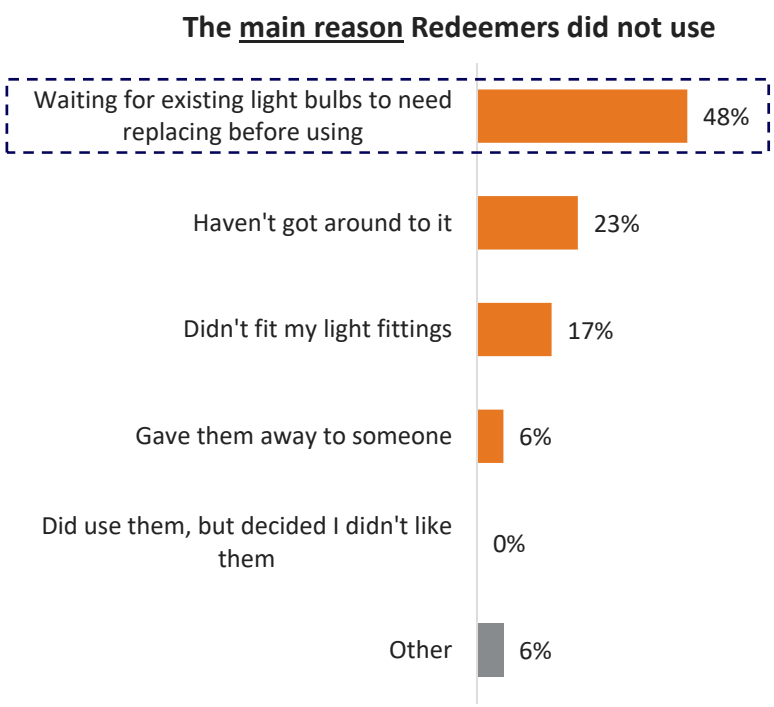
RU8: *Have you experienced any issues with the new LED light bulbs, e.g. stopped working? /* ***RU9:*** *And since replacing your light bulbs with the new LED light bulbs, have you noticed any reduction in your power bill?*

Base: *Redeem and Use (n=129)*

Just under half of those who redeemed and did not use the LED bulbs did so because they were waiting for existing light bulbs to need replacing

Redeem and Not Use





RN1: *Can you tell me why you haven't used any of the new LED light bulbs yet?* / ***RN2:*** *And can you tell me the main reason why you haven't used them yet?*

Base: *Redeem and Not Use (n=35)*

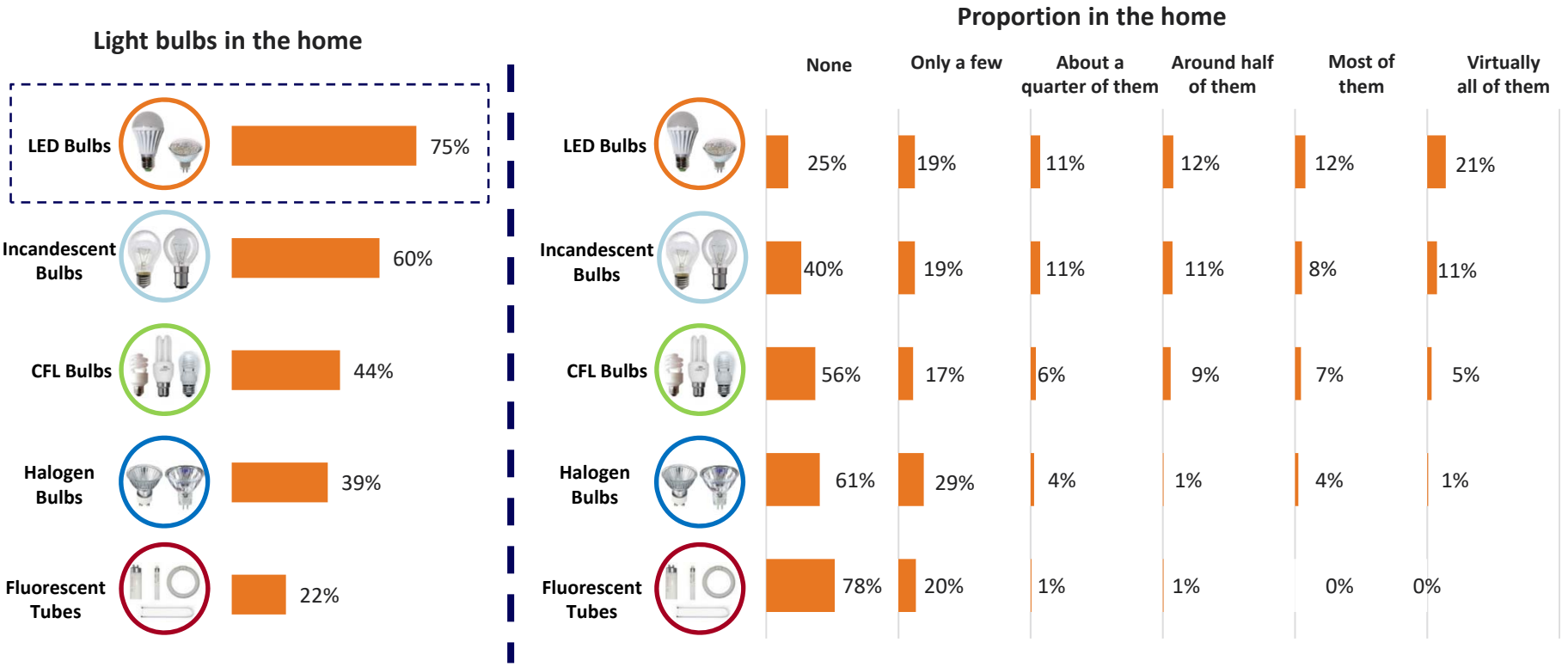
GAME CHANGERS

Overall the campaign can be considered a success, with results underlining the importance of supply and the importance of encouraging trial

- **Overall, the campaign has been largely successful.** The vast majority (84%) of those who received the voucher believed that the offer was a worthwhile initiative.
- **Non-Redeemers were less likely to feel positive about the campaign.** Their experience was impacted by the undersupply of light bulbs and overwhelming demand for the offer. Some 43% of Non-Redeemers didn't take up the offer because LineTrust had run out of light bulbs, whilst the time / date of redemption did not suit for 20% of them.
- **The offer has increased usage of LED light bulbs in the home.** Of those who redeemed and used the LED light bulbs, the majority (93%) replaced non-LED bulbs.
- **The campaign has led to positive uptake among first-time users.** Some 88% of first-time users had a positive experience using their LED light bulbs, emphasising the importance of encouraging trial to change opinions.
- **The majority of Redeemers who have not used their new LED lightbulbs are waiting for their existing bulbs to need replacing (49%) or they are yet to get around to replacing them (29%).** Getting these people to replace now to avoid wasting money instead of waiting needs to be included in messaging to assist with triggering change.

HOUSEHOLD LIGHTING

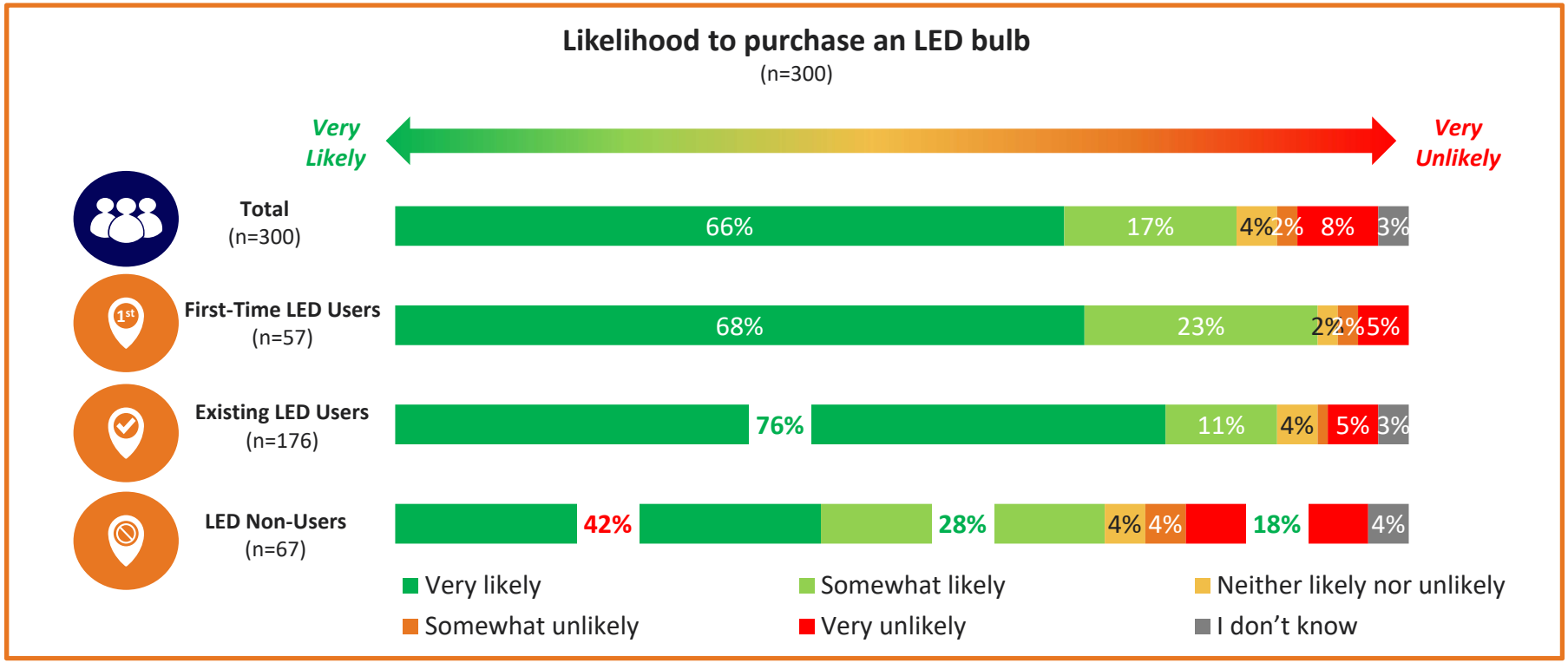
LED bulbs were the most common bulb in households, followed by traditional incandescent bulbs



EL1: *Which of the following types of light bulbs do you have in your home? /* ***EL2:*** *And of all the light bulbs in your home, how many would you say are* ***[INSERT LIGHT BULB TYPE]****? Would you say only a few, about a quarter, around a half, most of them, or virtually all of them?*

Base: *Total sample (n=300)*

LED Non-Users are the least likely to purchase LED bulbs in the future, indicating that trial is an important factor in encouraging future use



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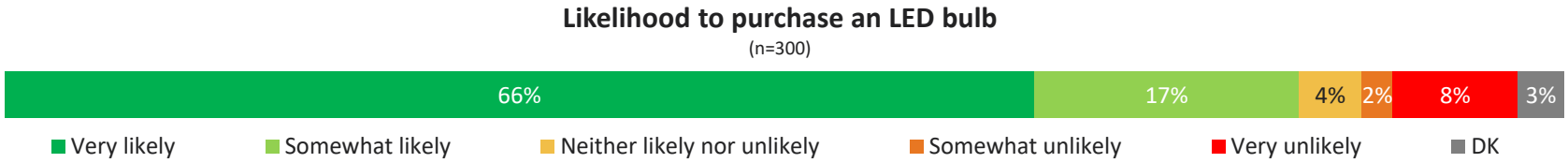
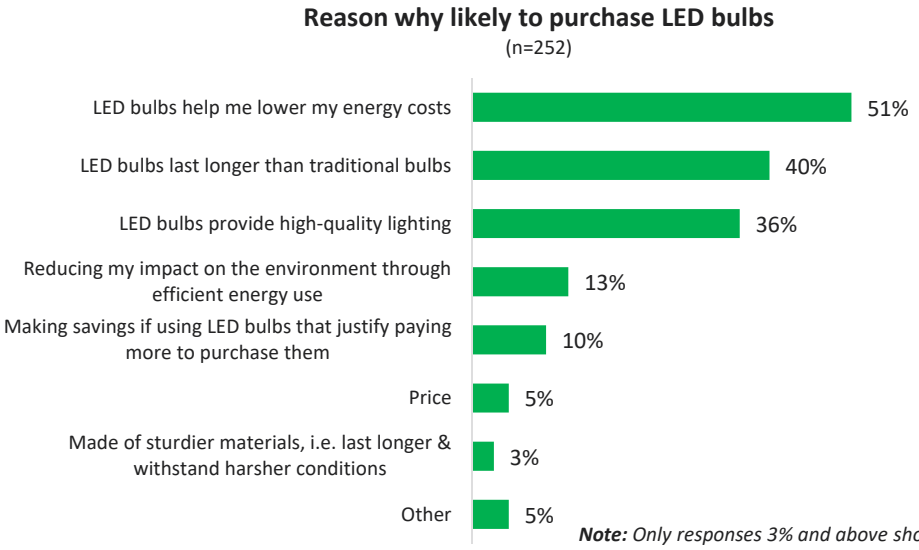
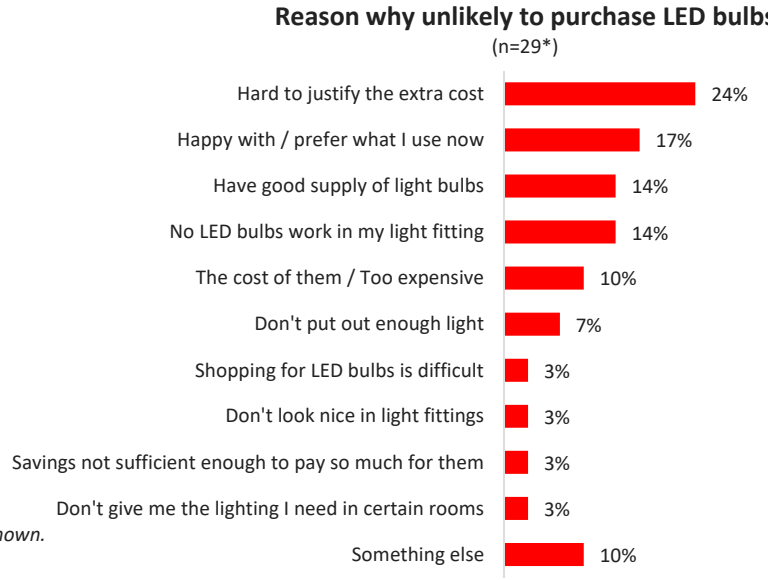
EL3a: *Thinking about the next time you have to replace a light bulb in your home, how likely are you to buy an LED light bulb? Would you say…?*

Base: *Total sample (n=300)*

The majority are likely to purchase an LED bulb in the future, with key reasons for this being *lower energy costs* and *longevity* of LED bulbs







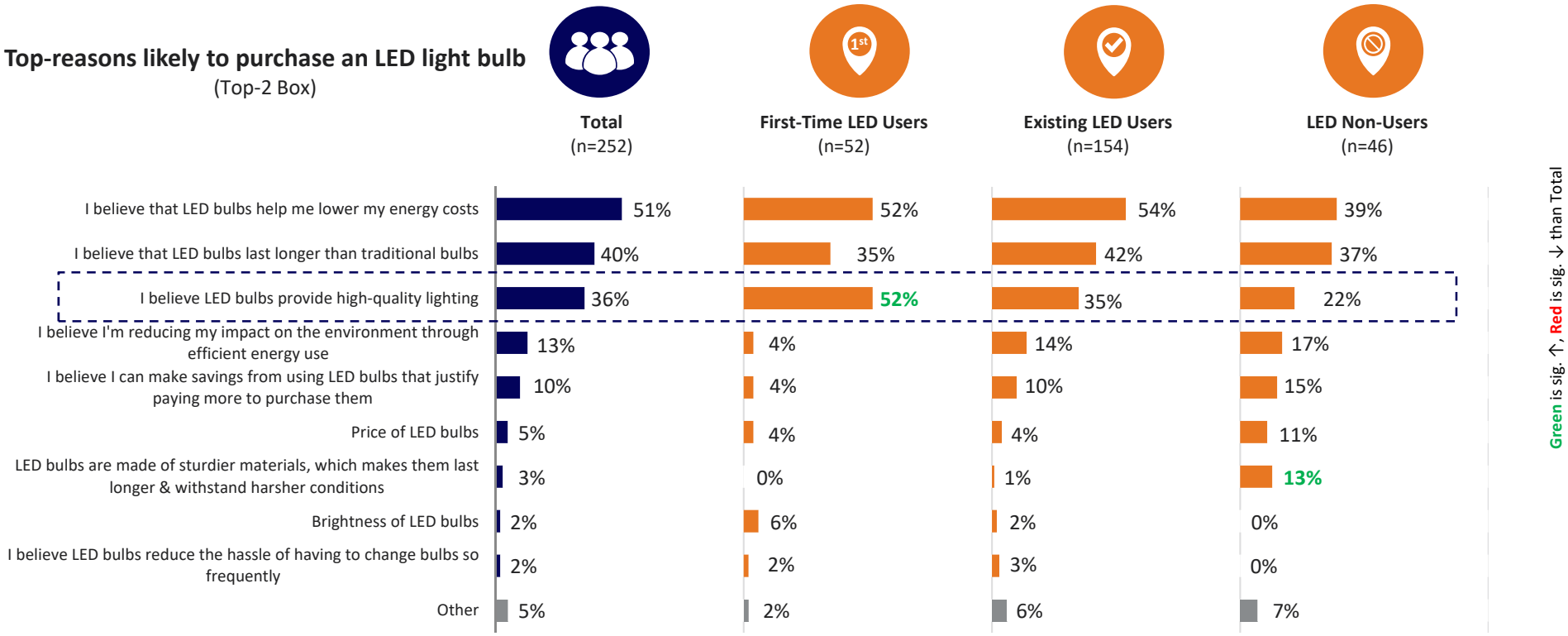
Note: *Only responses 3% and above shown.*

****Warning:*** *Low base size.*

EL3a: *Thinking about the next time you have to replace a light bulb in your home, how likely are you to buy an LED light bulb?* ***Base:*** *Total sample (n=300)* ***/ EL4:*** *It sounds like you're unlikely to buy LED light bulbs next time it comes to replacing them. Can you tell me what is impacting your likelihood to purchase?* ***Base:*** *Unlikely to purchase LED lightbulbs (n=29*) /* ***EL5:*** *It sounds like you're likely to buy LED light bulbs next time it comes to replacing them. Can you tell me what is impacting your likelihood to purchase?* ***Base:*** *Likely to purchase (n=252)*

Among the likely LED purchasers, First-Time LED Users were significantly more likely to believe that LED bulbs *provide high-quality lighting*

Top-reasons likely to purchase an LED light bulb
(Top-2 Box)

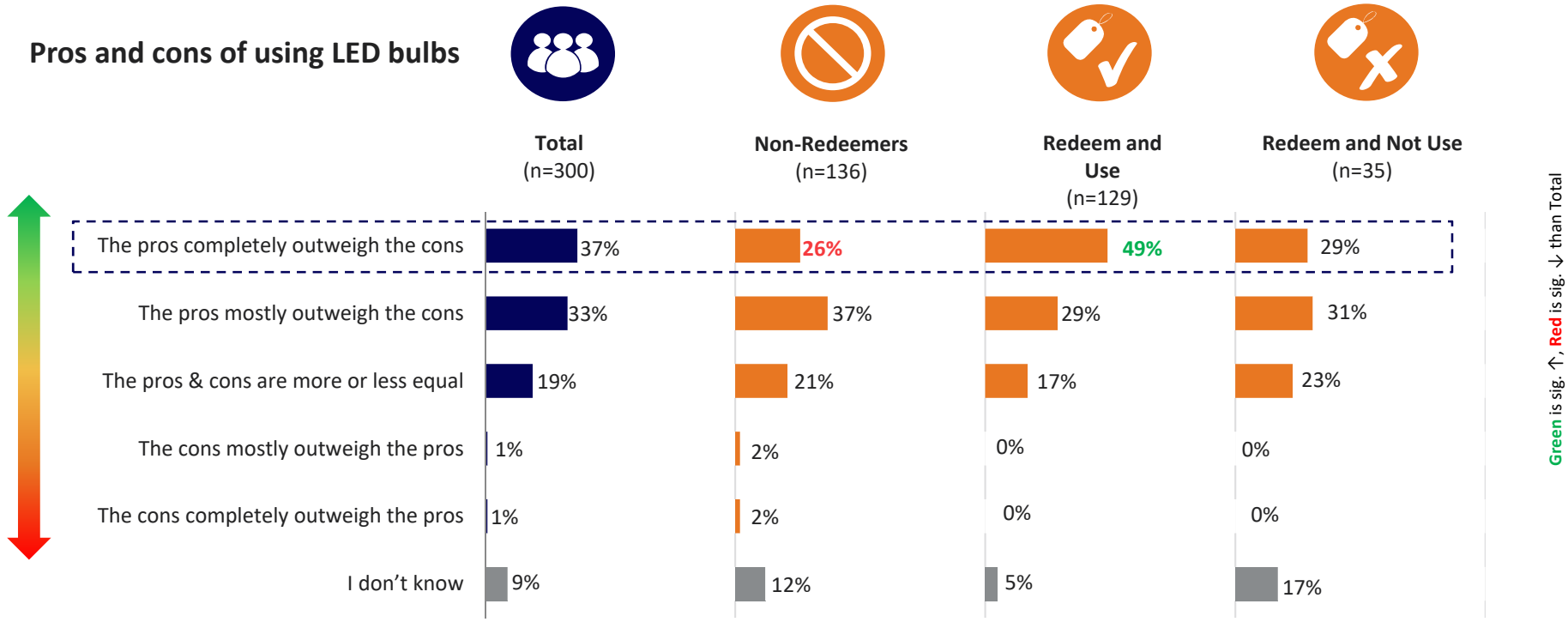


EL5: *It sounds like you're likely to buy LED light bulbs next time it comes to replacing them. Can you tell me what is impacting your likelihood to purchase?*

Base: *Likely to purchase (n=252).* ***Note:*** *Only top-10 reasons shown.*

GAME CHANGERS

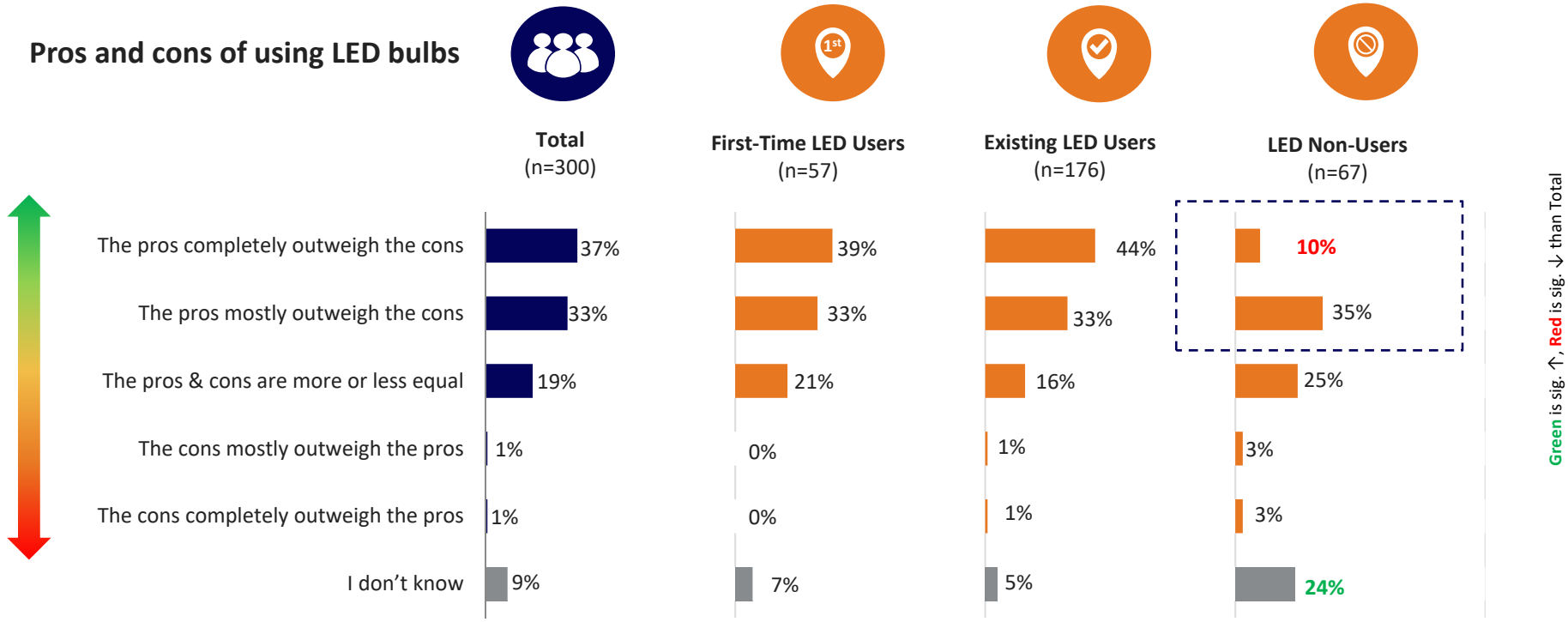
Those who redeemed the voucher and used the LED bulbs were more likely to believe that *the pros of LEDs completely outweigh the cons*



EL6: *And thinking about the pros and cons of using LED bulbs, for you personally, how do the pros currently compare with the cons? Would you say…?*

Base: *Total sample (n=300)*

Even among LED Non-Users, the view on LED bulbs is generally favourable, with this group also more likely to lack an opinion about LED bulbs



EL6: *And thinking about the pros and cons of using LED bulbs, for you personally, how do the pros currently compare with the cons? Would you say…?*

Base: *Total sample (n=300)*

PROFILE OF LED FIRST-TIME USERS

Most First-Time LED users were older couples with no children living at home (63%)

First-Time LED Users

Gender	Total (n=300)	First-Time User (n=57)
Male	48%	51%
Female	52%	49%

Age group	Total (n=300)	First-Time User (n=57)
Nett 25-44	6%	7%
Nett 45-64	36%	33%
Nett 65+	58%	60%

Type of area	Total (n=300)	First-Time User (n=57)
City or town	83%	77%
Rural	17%	23%

Home ownership	Total (n=300)	First-Time User (n=57)
Owner	98%	93%
Renter	2%	5%
Other	0%	2%

Total household income per year	Total (n=300)	First-Time User (n=57)
$60,000 or less	50%	54%
$60,001 to $70,000	11%	16%
$70,001 to $100,000	14%	12%
$100,001 to $120,000	8%	2%
$120,001 to $140,000	4%	4%
More than $140,000	3%	2%

Household situation	Total (n=300)	First-Time User (n=57)
Younger couple - no children	0%	0%
HH - youngest child under 5	1%	0%
HH - youngest child 5-13	8%	7%
HH - youngest child 14-17	5%	5%
HH - youngest child 18+	6%	4%
Older couple - no children or none living at home	53%	63%
Single / one-person HH	25%	19%
In a flatting arrangement	1%	2%
Other	1%	0%

GAME CHANGERS

PROFILE OF EXISTING LED USERS

Existing LED Users are more prevalent among those with a total household income of over $70,000 and those aged 45-64

Existing LED Users

Gender	Total (n=300)	Existing Users (n=176)
Male	48%	52%
Female	52%	48%

Age group	Total (n=300)	Existing Users (n=176)
Nett 25-44	6%	7%
Nett 45-64	36%	40%
Nett 65+	58%	53%

Type of area	Total (n=300)	Existing Users (n=176)
City or town	83%	84%
Rural	17%	16%

Home ownership	Total (n=300)	Existing Users (n=176)
Owner	98%	98%
Renter	2%	2%
Other	0%	0%

Total household income per year	Total (n=300)	Existing Users (n=176)
$60,000 or less	50%	41%
$60,001 to $70,000	11%	9%
$70,001 to $100,000	14%	17%
$100,001 to $120,000	8%	11%
$120,001 to $140,000	4%	5%
More than $140,000	3%	4%

Household situation	Total (n=300)	Existing Users (n=176)
Younger couple - no children	0%	0%
HH - youngest child under 5	1%	1%
HH - youngest child 5-13	8%	9%
HH - youngest child 14-17	5%	5%
HH - youngest child 18+	6%	9%
Older couple - no children or none living at home	53%	56%
Single / one-person HH	25%	18%
In a flatting arrangement	1%	1%
Other	1%	1%

PROFILE OF LED NON-USERS

LED Non-Users are more likely to earn less than $60,000 per year and live in a single / one-person household

LED Non-Users

Gender	Total (n=300)	Non-Users (n=67)
Male	48%	36%
Female	52%	64%

Age group	Total (n=300)	Non-Users (n=67)
Nett 25-44	6%	3%
Nett 45-64	36%	30%
Nett 65+	58%	67%

Type of area	Total (n=300)	Non-Users (n=67)
City or town	83%	85%
Rural	17%	15%

Home ownership	Total (n=300)	Non-Users (n=67)
Owner	98%	99%
Renter	2%	1%
Other	0%	0%

Total household income per year	Total (n=300)	Non-Users (n=67)
$60,000 or less	51%	72%
$60,001 to $70,000	11%	12%
$70,001 to $100,000	14%	6%
$100,001 to $120,000	8%	4%
$120,001 to $140,000	4%	0%
More than $140,000	3%	1%

Household situation	Total (n=300)	Non-Users (n=67)
Younger couple - no children	0%	0%
HH - youngest child under 5	1%	0%
HH - youngest child 5-13	8%	7%
HH - youngest child 14-17	5%	3%
HH - youngest child 18+	6%	1%
Older couple - no children or none living at home	53%	34%
Single / one-person HH	25%	51%
In a flatting arrangement	1%	1%
Other	1%	1%

Green is sig. ↑, Red is sig. ↓ than Total

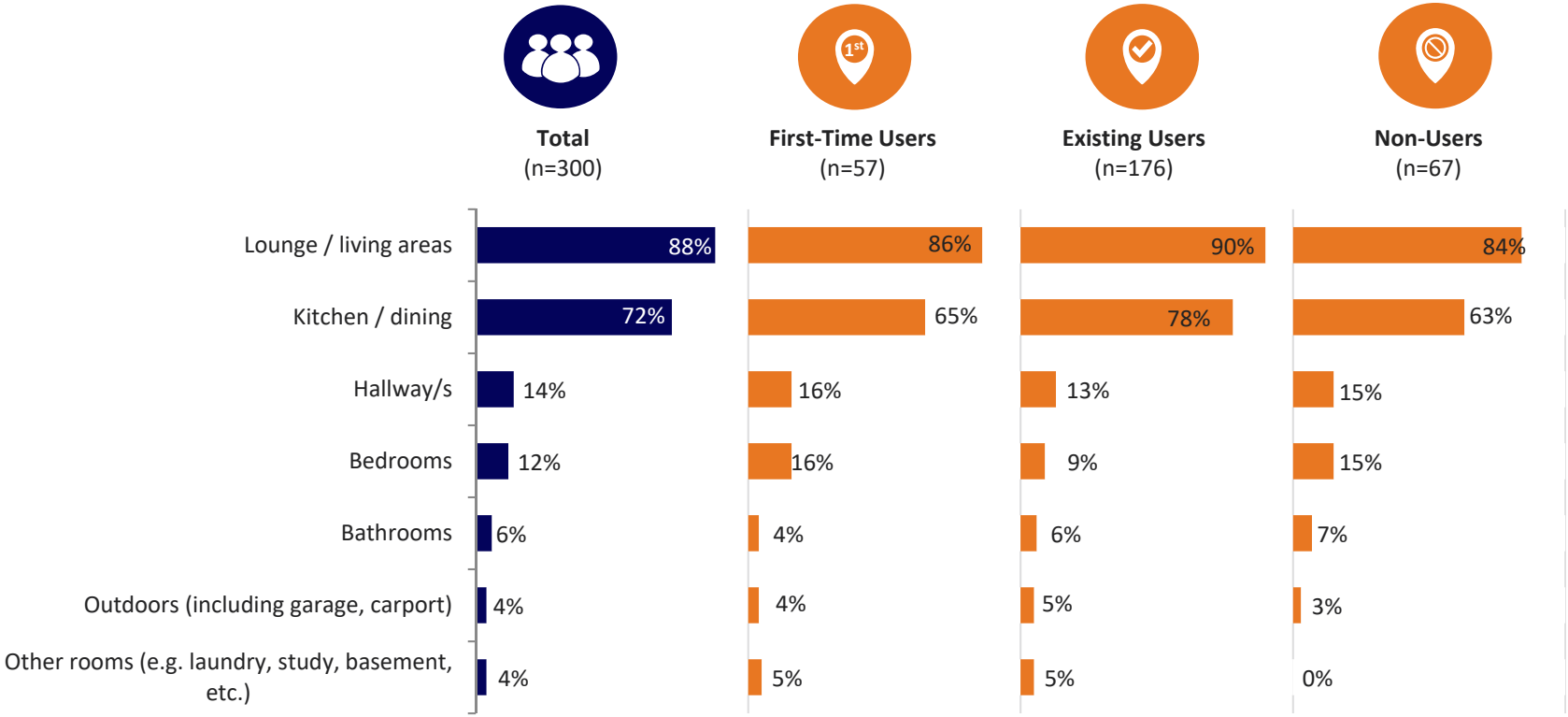
Usage of LED bulbs in the South Canterbury region is high; emphasis should be put on educating non-users about the benefits of LED light bulbs

- **Overall, usage of LED light bulbs is considerably high.** Three-quarters of respondents have LED light bulbs in their home.
- **The majority of First-Time LED Users and Existing LED Users are likely to purchase an LED bulb** next time they are required to purchase a bulb.
- **Perceived benefits of LED light bulbs are that they *help lower energy costs*, they *last longer than traditional light bulbs* and they *provide high-quality lighting.*** Their disadvantages are that *it's hard to justify the extra cost of LED bulbs* and *people are happy with what they currently use.* These views are more prevalent amongst LED Non-Users, who tend to have lower incomes, and therefore the value proposition case also needs to be made.
- **The results suggest First-Time LED Users have noticed an increase in lighting quality after replacing their bulbs.** First-Time LED Users were significantly more likely to believe that *LED bulbs provide high-quality lighting*.
- **There is a degree of unawareness among LED Non-Users of the benefits and disadvantages of LED light bulbs.** Future campaigns should focus on non-users and educating this group on the overall benefits of LED light bulb usage, as well as how using non-LED lightbulbs is wasting money – especially as they tend to be lower income.

APPENDIX

APPENDIX

There is little difference between the three groups in terms of the areas in which they typically have lighting on during the winter hours of 6pm and 9pm



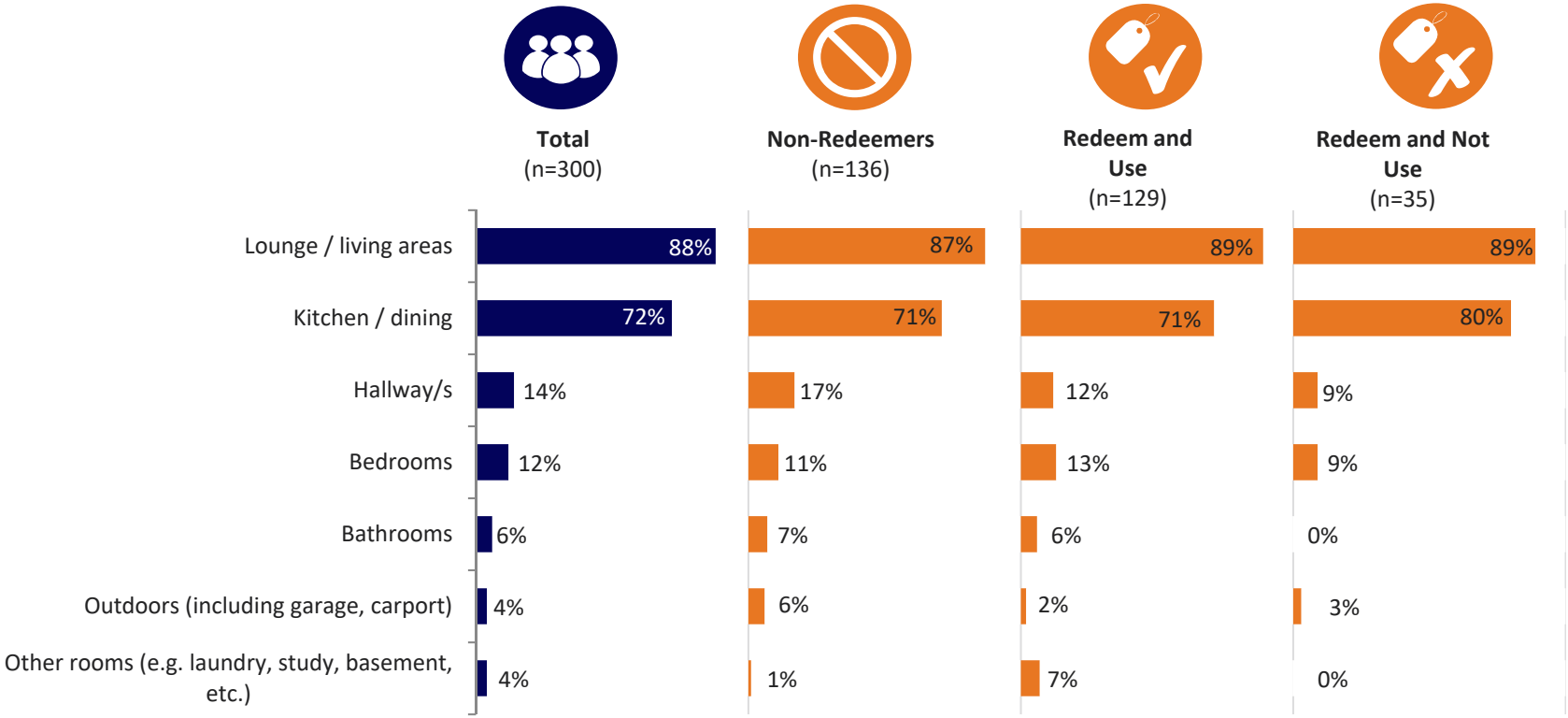
EL3: *Which room(s) or areas of your home would you typically have lighting on most of the time during the hours of 6pm–9pm in winter? Would you say…?*

Base: *Total sample (n=300)*

GAME CHANGERS

APPENDIX

Living areas and kitchens are the main areas in the home where people typically have lighting on between the hours of 6pm and 9pm in winter



EL3: *Which room(s) or areas of your home would you typically have lighting on most of the time during the hours of 6pm–9pm in winter? Would you say…?*

Base: *Total sample (n=300)*

Contacts

Information withheld under section 9(2)(a)

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GAME CHANGERS

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Energy Efficiency and Conservation Authority
Te Tari Tiaki Pūngao

Landlords Market Understanding

Understanding landlords' knowledge of insulation requirements of the Residential Tenancies Act

Information withheld under section 9(2)(a)

GAME CHANGERS

Draft Report 10-04-17

Content

THE STARTING POINT

The law changes to the Residential Tenancies Act are now in force.

Residential rental homes in New Zealand will be required to have insulation.

Social housing (where tenants pay an income-related rent) must be insulated by 1 July 2016 and all other rental homes by July 2019.

Landlords are required to provide a statement on the tenancy agreement for any new tenancy commencing from 1 July 2016 about the location, type and condition of insulation in the rental home. Installing conductive foil insulation in residential and rental homes is now banned.

EECA wishes to support an early uptake of insulation compliance for rental properties by running a communication campaign. Several communication hypotheses have been developed based on the existing research findings *(EECA Consumer Monitor and Ogilvy Landlord report),* but more research is needed to fully understand the needs and motivations of landlords, in particular 'Ma and Pa' type investors.

Identifying the most relevant communication messages to accelerate the uptake of compliance with the new insulation requirements for rental properties

EECA

EECA wishes to support an early uptake of insulation improvements for rental properties by running a communication campaign that will promote the insulation funding programme "Warm-up New Zealand: Healthy Homes".

Impact of EECA's campaign

To reach this objective, EECA needs to have a deeper understanding of landlords' needs and motivations. The findings will be used to identify the messages that resonate most with landlords in order to educate and encourage them to be in early compliance with the new insulation requirements. 'Ma and Pa' landlords will be an important target group.

How to help drive early compliance?

This will enable EECA to best strategize on where to focus its effort to drive early compliance with the new insulation requirements of the Residential Tenancies Act, and greater uptake of the WUNZ subsidy.

We interviewed a specific segment of interest and not the entire landlord market

We spoke to landlords who own at least one **free-standing** property (e.g. not an apartment)

Had a least one property that was **built before 2000.**

Had at least one property that is **not fully insulated** (e.g. ceiling and underfloor insulation where possible can be improved).

We also deliberately sampled a small number of landlords who had **fully insulated in the last 12 – 24 months** as a specific group of interest.

Amongst those landlords with a portfolio of properties, they would be asked questions on relevant properties only. e.g. a landlord has one out of three properties before 2000, they would only be asked about that one property assuming it fits the criteria of fee-standing and not fully insulated.

Where applicable results are looked at in three different ways

Approach to rental investment

Amateur – 80%

197 amateur landlords. They own 1-2 rental properties, representing 249 properties in the sample.

Semi-professional – 20%

48 semi-professional landlords. They own 3 or more rental properties, representing 164 properties in the sample.

Portfolio

All properties are fully insulated	**Some properties** are fully insulated	**No properties** are fully insulated
48 Landlords	**51 Landlords**	**146 Landlords**

Our sample

Rental property insulation status

Ceiling insulation only can be improved	**51 properties**
Underfloor insulation only can be improved	**96 properties**
Ceiling & underfloor insulation can both be improved	**112 properties**
Fully insulated (where possible)*	**154 properties**
	413 properties

*Note: Fully insulated is defined as having insulation where it is possible e.g. if a landlord has ceiling fully insulated, but underfloor insulation is not possible, then the landlord would be considered fully insulated.

Profiling:
Landlord approach to Rental Investment

GAME CHANGERS

Landlord

Amateurs are starting out on their ‘landlord journey’, often they have evolved into that position through circumstance rather than intended design

WHO

They are more likely to be 40 to 49 years.

They are slightly more likely to be female.

They are slightly more likely to have an income under $100,000 per year.

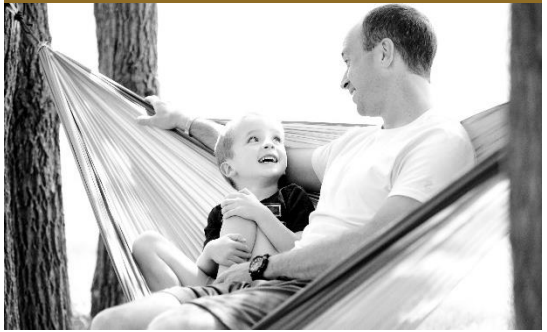
PROPERTIES

Almost all own a stand-alone house.

Improving floor insulation is a comparatively bigger issue recognised by this group.

They are more likely to have no properties fully insulated.

ATTITUDES



When asked what was their motivation to buy a new rental, they were slightly more likely to say:

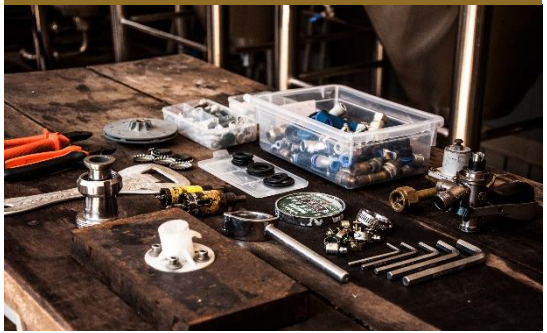
- It was their first home.
- They bought it for family use.

GAME CHANGERS

Landlord

As ‘ma and pa’ investors, they are more likely to be hands-on and reactive with their management, and tend to have ‘shallow’ relationships with their tenants

MANAGING RENTAL



They are slightly more likely to manage their own properties

The factors looked at when something needs improvement is due to urgency and the quality of work they can get.

KEEPING INFORMED

Slightly less likely to be members of the PIA.

Their top 3 sources of information are:

- News media
- Property manager
- Family / friends

They are also more likely to seek advice from consumer information websites, such as ENERYWISE, and their lawyers.

TENANTS

Slightly more likely to have tenants that stay for less than 2 years.

They are also less likely to know if their tenants have a CSC.

GAME CHANGERS

Landlord

Semi-professionals are well into their 'landlord journey', having a portfolio of different rental property types and their approach is more as a business

WHO

They are more likely to be 50-64 years.

They are slightly more likely to be male.

They are slightly more likely to have an income over $140,000 per year.

PROPERTIES

They are more likely to own a property in the city and have a range rentals homes, including semi-detached homes or units.

Improving both ceiling and floor insulation is recognised issue for this group, but are more likely to have their properties fully insulated.

ATTITUDES

When asked what was their motivation to buy a new rental, they were more likely to say:

- Income for retirement.
- Based on how it fits with my overall portfolio of investments.

GAME CHANGERS

SEMI-PROFESSIONALS & THEIR RENTAL PROPERTIES

They are less likely to be hands on with their properties and take a longer term view on maintenance, but tend to have 'deeper' relationships with tenants

MANAGING RENTAL

They are slightly more likely to manage their properties through a property manager.

The main factor they look at when upgrading or maintaining the home is keeping the property in good condition.

KEEPING INFORMED

They are slightly more likely to be members of the PIA

Their top 3 sources of information are:

- Property manager
- MBIE
- Mainstream and news media

They are also more likely to get their information from landlord associations, MBIE and a property manager.

TENANTS

They are slightly more likely to have tenants that stay with them for over 2 years.

They are also likely to know they have tenants who hold a CSC.

Potentially having a property manager assists them in having more knowledge about their tenants CSC status.

The two landlord types require different levels of messaging and support, and will be reached via different channels

	AMATEURS	SEMI-PROFESSIONALS
Level of support	Amateurs will need more support when it comes to both awareness and compliance.	Semi-professionals are generally more informed, so will require less support in regards to awareness, and set focus on understanding compliance obligations.
Method of tonality	Messaging should be that EECA is here to help ensure you are compliant with your rental property and that planning now is better than leaving until the last minute, esp. if your tenant is a CSC card holder.	Tonality needs to be more of a reminder to get things done, rather than an educational tool. Also that WUNZ funding is limited, so getting in now is important.
Media Channel	Given that mass media is a dominant channel for staying informed, ATL is a suitable avenue for these types of landlords to drive greater awareness.	Property managers will be a key channel, so they too will need to know about current funding availability for their landline clientele.

Current status of rental properties and intentions to upgrade insulation

Actual insulation status may not reflect what is self-reported

For the purposes of this study, a house is fully insulated if it meets the RTA requirements of ceiling and floor insulation (where possible).

Meeting legal requirements of insulation status is self-reported by the landlord

Further to this, requirements around R-values are not explored.

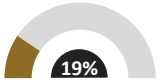
Overall, this means that the status of insulated rental properties could be over-stated due to lack of factual knowledge by the landlord. This in itself presents a different opportunity for EECA to address.

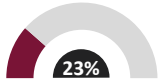
Landlord

Amateur landlords are more likely to have no properties that are fully insulated, with underfloor a particular area of improvement compared to semi-professionals

Property portfolio by segment

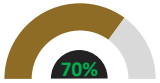
All properties are fully insulated

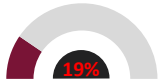




Some properties are fully insulated

None of their properties are fully insulated





Green is sig. ↑ and Red is sig. ↓ compared to the total sample

Base: *Portfolio by segment: Amateur (n=197), semi-professional (n=48). Rental property insulation status: Amateur (n=249), semi-professional (n=164)*

Properties

Over 40% of amateurs are presently either undecided or don't intend to upgrade ceiling or underfloor insulation; floor has lower levels of intention to upgrade

Intention to upgrade ceiling insulation


I plan to install or upgrade in the next 12 months	22%	48%
I plan to install or upgrade but not in the next 12 months	35%	23%
I don't know or I'm undecided if I will install or upgrade ceiling / underfloor insulation	39%	27%
I don't ever plan to buy, install or upgrade ceiling insulation	5%	2%

Intention to upgrade underfloor insulation


I plan to install or upgrade in the next 12 months	25%	30%
I plan to install or upgrade but not in the next 12 months	31%	17%
I don't know or I'm undecided if I will install or upgrade ceiling / underfloor insulation	35%	36%
I don't ever plan to buy, install or upgrade underfloor insulation	9%	17%

Green is sig. ↑ and Red is sig. ↓ compared to the total sample

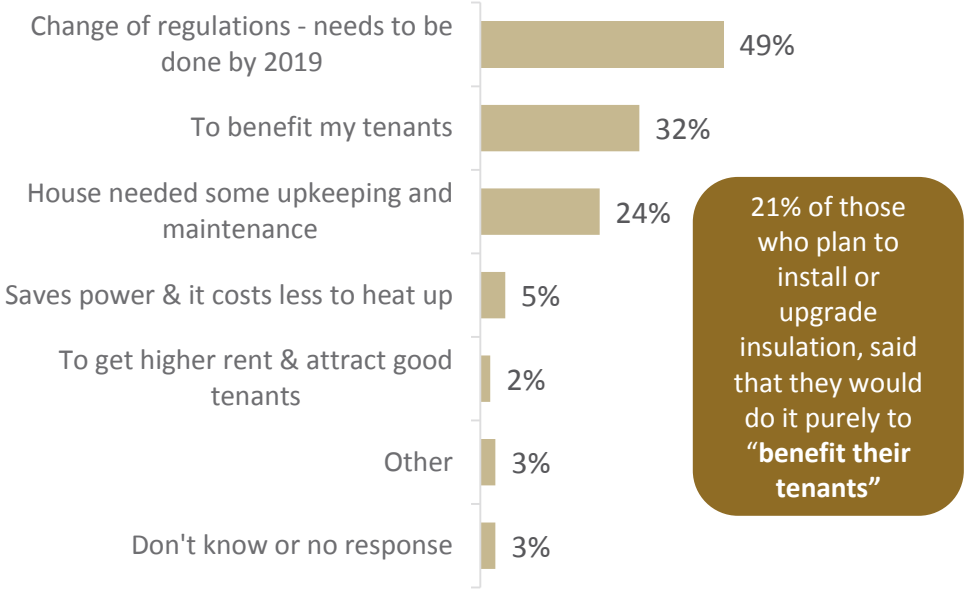
Base: *Intention to upgrade ceiling (n=152), Intention to upgrade underfloor (n=186)*

GAME CHANGERS

Landlord

Amongst those 59% intending to install, regulations are the main driver for this, although there is also an emotional driving of wanting to benefit tenants

Why are you intending to install or upgrade insulation in one or more of your properties? - Spontaneous



21% of those who plan to install or upgrade insulation, said that they would do it purely to "**benefit their tenants**"

"Because the under floor insulation is not complete and is now a requirement by law to be done by a certain time."

"Keep the house warmer and dry for tenants and to preserve the house from dampness."

"Regulations for underfloor insulation."

"Its now a legal obligation and will help maintain my property."

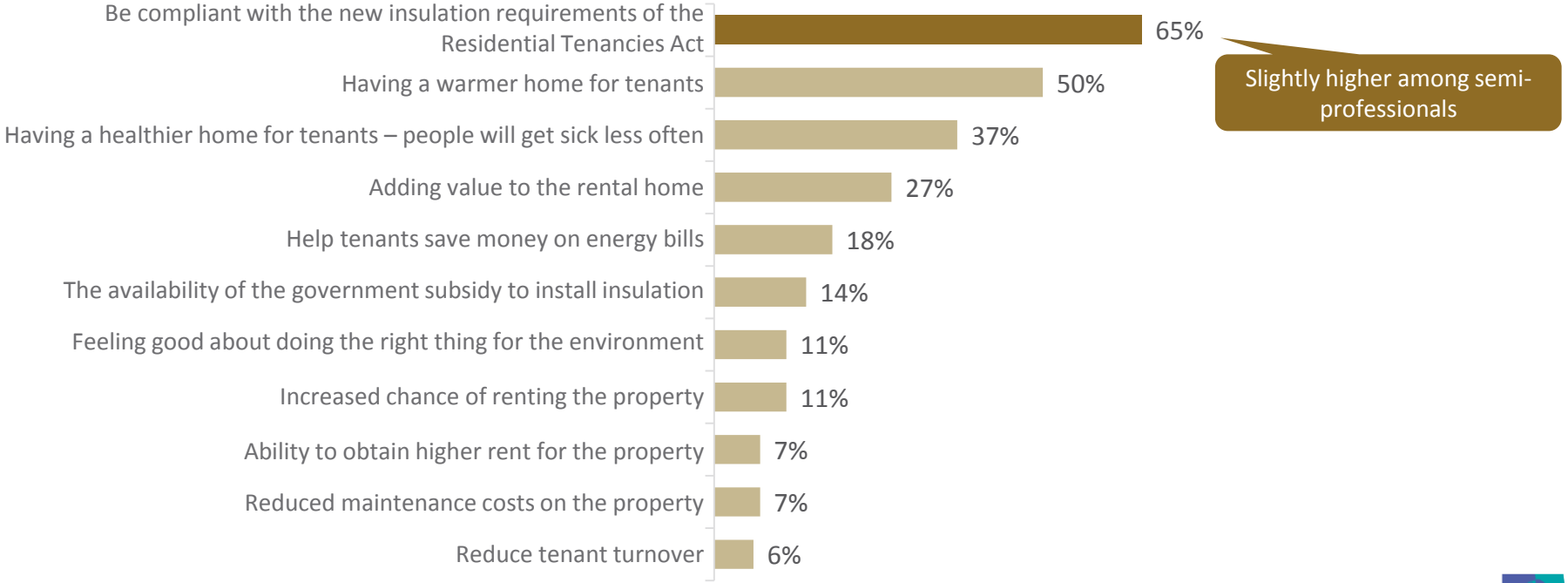
"Firstly, the law changed. Both houses are very warm and dry and really don't need the extra insulation but I will obey the law."

Mb1a. *Can you tell me in a bit more detail what prompted you to plan to install or upgrade ceiling / underfloor insulation in one or more of your rental properties?* ***Base:*** *Those who plan to install or upgrade insulation for at least one property (n=117)*

Landlord

And when prompted with a list of possible reasons, importance of rational (compliance) and emotional (tenant benefits) drivers are even more notable

Key reasons why you're planning to install or upgrade insulation - Prompted

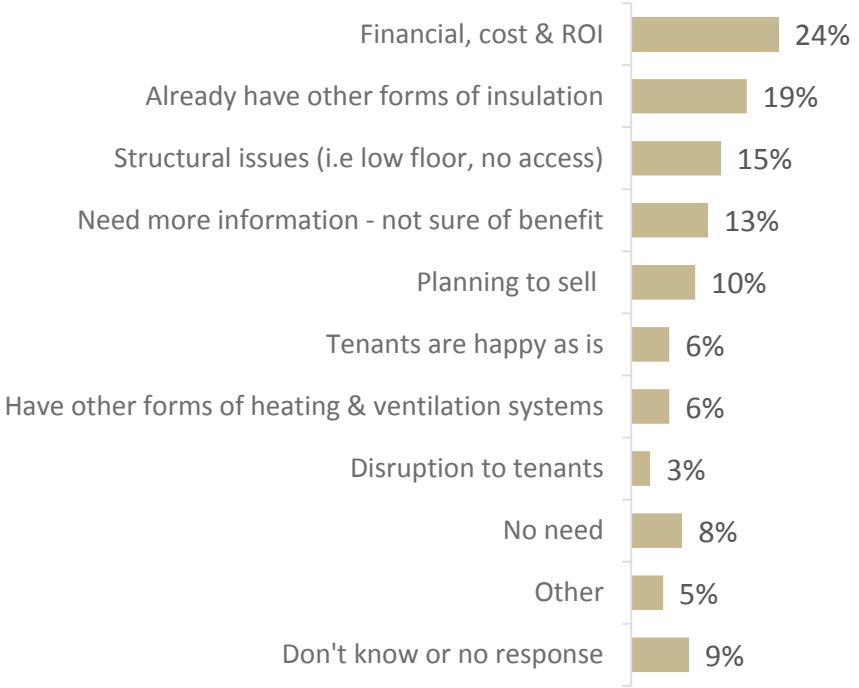


MB2a/b. *And which of the following are the key reasons you are planning to install or upgrade your ceiling / underfloor insulation?*
Base: *Those who plan to upgrade / maintained insulation (n=117)*

Landlord

49% of those who are undecided or not intending to install, cite costs as the key reason, followed by having other forms of insulation and structural issues

Why you're undecided or unlikely to install or upgrade ceiling or underfloor insulation? - Spontaneous



"The cost for insulation is too expensive and difficult to get finance from the bank as a top up."

"Unable to install underfloor heating & batts in ceiling are still good."

"Ceiling fully insulated. Under floor solid concrete."

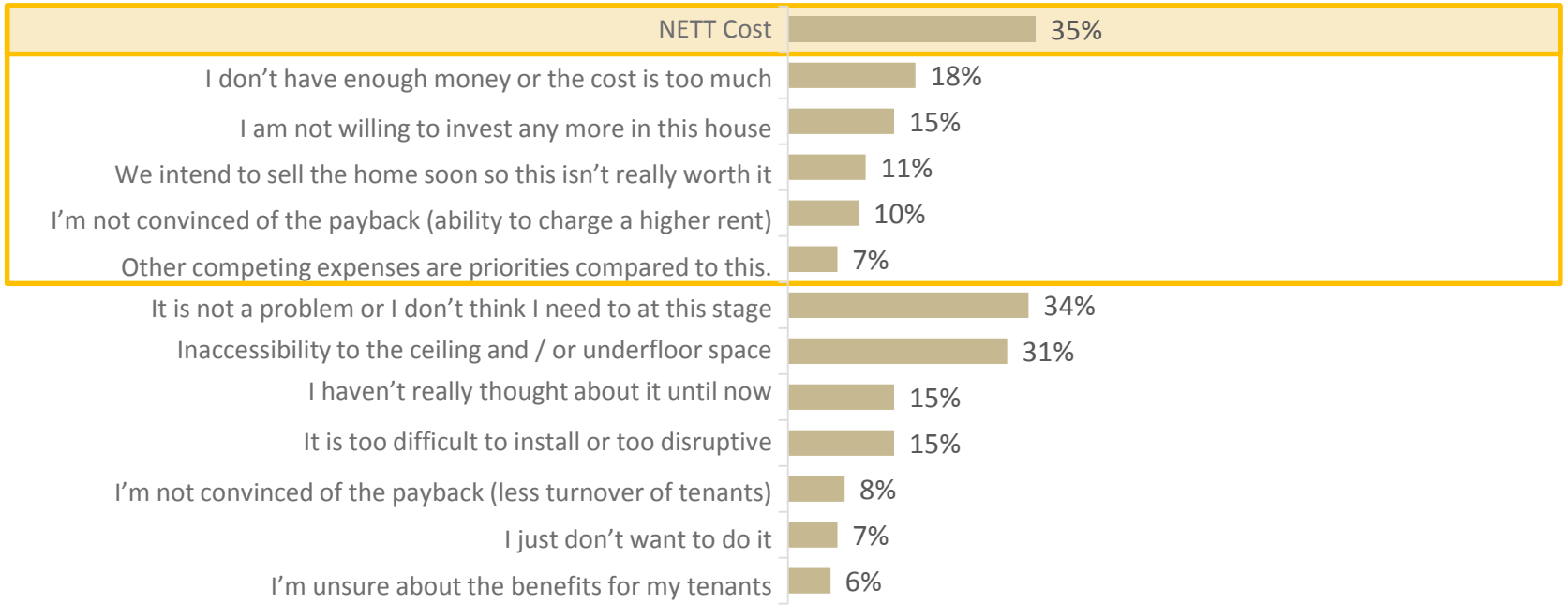
"Getting quotes etc. Time really... Also, I am wondering if there may be some help with it as my tenant in Hatfields is a community services holder."

MB1b. *Can you tell me in a bit more detail why you're undecided about ceiling / underfloor insulation in one or more of your rental properties?* ***Base:*** *Those who are undecided to install or upgrade insulation for at least one property (n=96)*

Landlord

And when prompted with a list of possible reasons, there is greater nuance around barrier of costs, with indifference and inaccessibility still notable

Key reasons why you're undecided or unlikely to install or upgrade insulation - Prompted



MB3a/b. *And which of the following are the key reasons you are undecided or unlikely to install or upgrade your ceiling / underfloor insulation?* ***Base:*** *Those who are undecided or don't plan to install and upgrade insulation (n=96)*

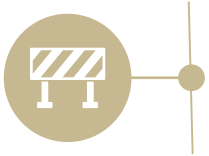
There is a clear opportunity to encourage landlords, especially amateurs, of the need to upgrade insulation in their rental properties

Amateur landlords are a larger target of concern given comparatively lower levels of full insulation and future intention to insulate; whereas semi-professionals for the most part have higher intention levels in regards to compliance and taking action

However, across landlord types there is a reticence towards upgrading underfloor, which means this aspect of insulation will need to be highlighted in communications as something that is required

Those intending in the near future are being prompted by compliance to the RTA

Although there is a emotional prompt which could be highlighted as a secondary benefit in communications.



Those undecided or unwilling to upgrade cite cost, indifference or inaccessibility as reasons for their inaction

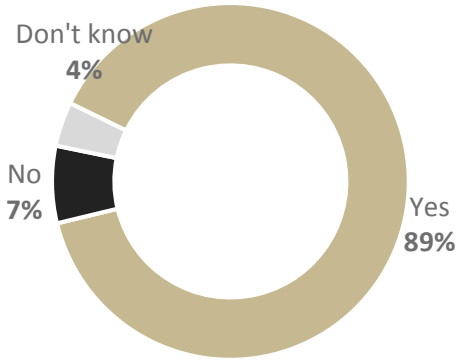
They need to be guided to overcome each of these barriers through more knowledge about WUNZ funding (where possible), making them care (through a non-compliance ‘stick’) and that legally they are required to do this.

Awareness of the Residential Tenancies Act and WUNZ funding

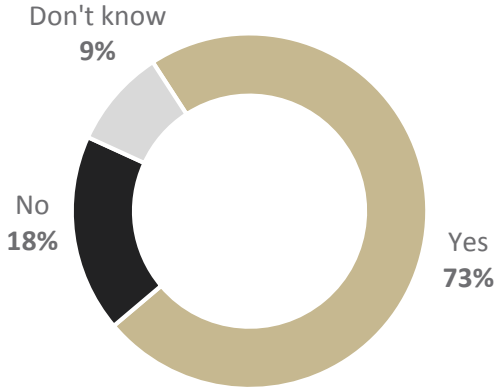
Landlord

And the majority claim to have heard of the Residential Tenancies Act

Have you heard about the RTA



Are you aware of the new legal requirements for rental properties?

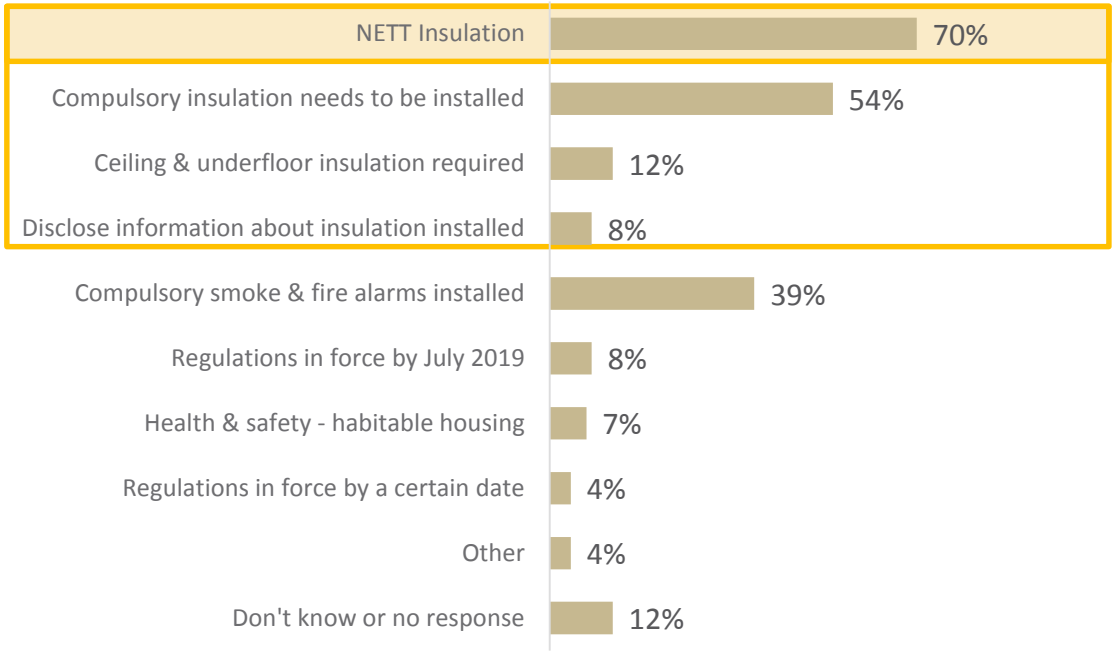


A2. *Have heard about the Residential Tenancies Act?* ***A3.*** *Are you aware of the new legal requirements for rental properties (since July 2016)?* ***Base:*** *Total sample (n=245)*

Landlord

Compulsory insulation tends to be known as a legal requirement of the RTA, although whether they know it refers to both ceiling and underfloor is unclear

What do you know about your new legal requirements?



***Note:** Only statements above 4% charted*

"The property must be fully insulated and dry with a means for heating it."

"Need working smoke alarms installed, long-life batteries and a photoelectric sensor. Insulation is now required."

"All rentals have to have smoke alarms and statements from the landlord regarding the extent of insulation since July last year (I think) and there has to be ceiling and underfloor insulation by July 2019. The government is also working on a law to make it help tenants not to be evicted easily."

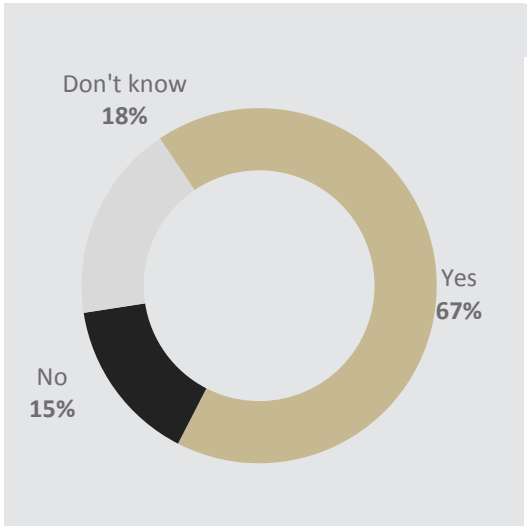
"Properties have to be insulated ceiling and underfloor by a certain date (which I'm not sure of)."

***A4.** Can you describe what you know about the new legal requirements? **Base:** Those aware of the new legal requirements (n=179)*

GAME CHANGERS

And in fact less than half of those properties owned by landlords who believe they are compliant are actually fully insulated

Are your properties compliant?



Property compliance by rental property insulation status

	Total Market	Yes (67%)	No (15%)	Don't know (18%)
Fully insulated (where possible)	37%	45%	28%	17%
Not fully insulated	63%	55%	72%	83%

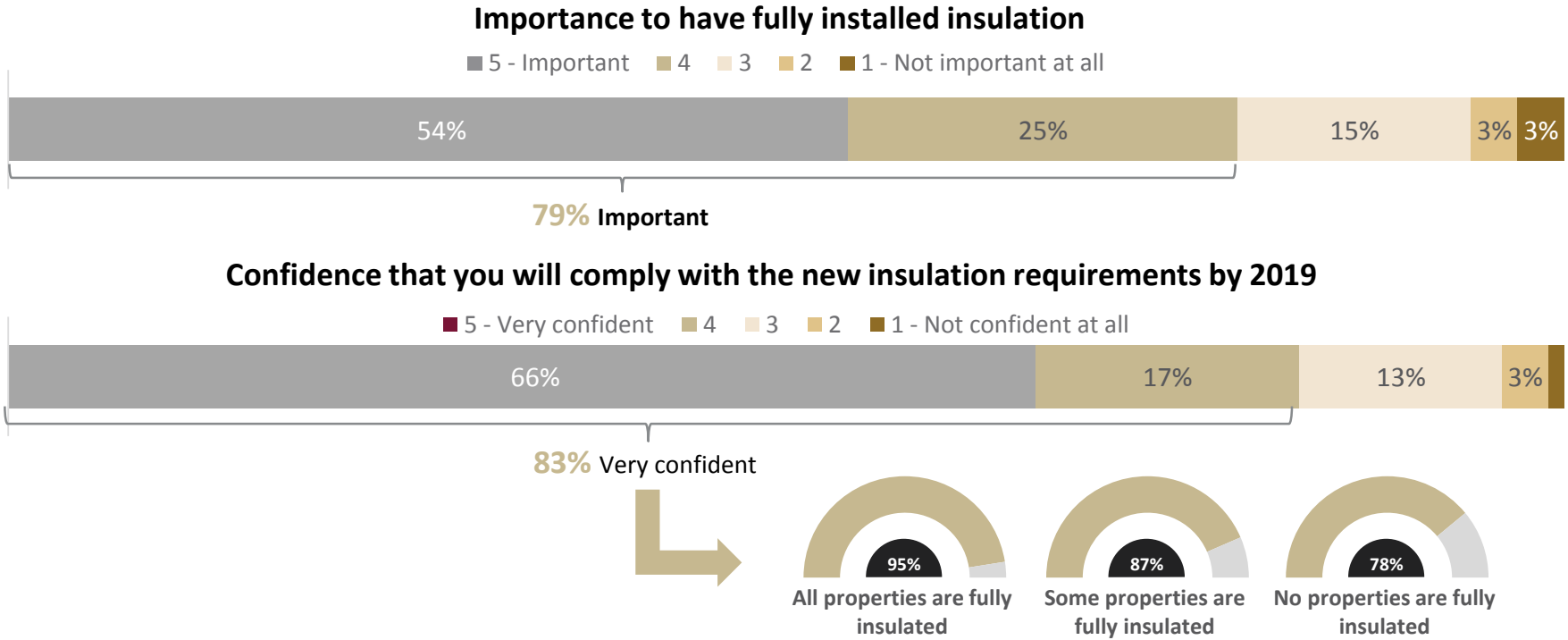
A5. *Based on your current knowledge, are your property rentals compliant with current legal requirements?* ***Base:*** *are your properties compliant: Total sample (n=245), property compliance by rental property insulation status (n=413)*

Respondents were then presented with this:
"As part of the new Residential Tenancies Act, residential rental homes in New Zealand will be required to have ceiling and/or underfloor insulation where practically applicable by July 2019.

Landlords will be required to disclose the extent of insulation in their properties as part of the Tenancy Agreement from 1 July 2016."

Landlord

There are high levels of importance and confidence, but there is still about 20% of landlords who do not think it is important or are confident that they will comply



A6. *Considering this new law, how important is it for you to ensure your rental properties have fully install ceiling / underfloor insulation?* ***A7a.*** *How confident are you that you will comply with the insulation requirements for rental properties by 2019?* ***Base:*** *Total sample (n=245)*

GAME CHANGERS

Landlord

Those 4% who are 'not confident at all' will comply cite mainly financial barriers

Reasons why landlords are NOT confident they will not comply by 2019

"Tenants don't want to be disturbed"

"Insulation is not comprehensive"

"It is time consuming and the cost is too expensive"

"Financial hardship is all that's holding me back"

"House will be demolished"

"In fact I don't really care. I simply can not afford it. I would probably get rid of the tenants and move back myself."

"I keep the rent affordable for the tenants, however, it doesn't give anything left after mortgage, rates and insurance are taken out and apparently I don't qualify for assistance through the council as my tenants are not on WINZ to get insulation upgraded now."

"Money. Tenant occupancy and accessibility."

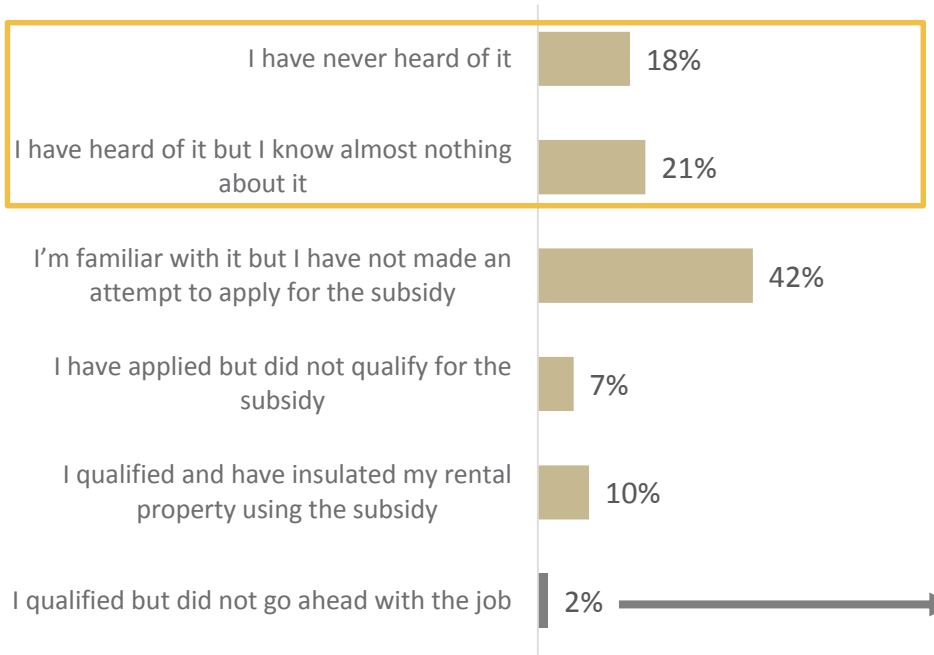
A7B. *Can you tell me why you're not confident with your ability to meet this timeline?* ***Base:*** *Those who are not confident they will meet the requirements by 2019 (scores 1-2)*

Respondents were then presented with this:
“Government subsidies are available to upgrade insulation of rental properties via the program Warm Up New Zealand: Healthy Homes until the end of June 2018.”

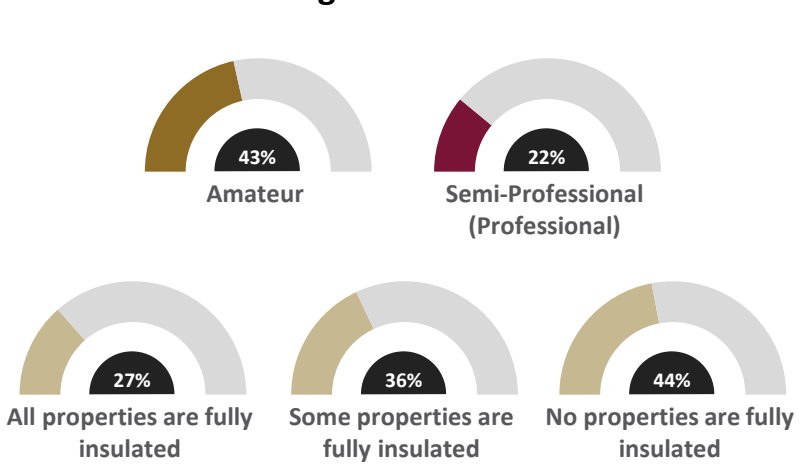
Landlord

Some 40% of landlords know next to nothing about WUNZ subsidies, showing a clear need for further communications about their availability

How much do you know about government subsidies?



Those who have NOT heard or know almost nothing about subsidies



"We just wait a bit longer so we can pay in one go and the property is reasonably well insulated."

"I will go ahead with it once I find a contractor to do the job."

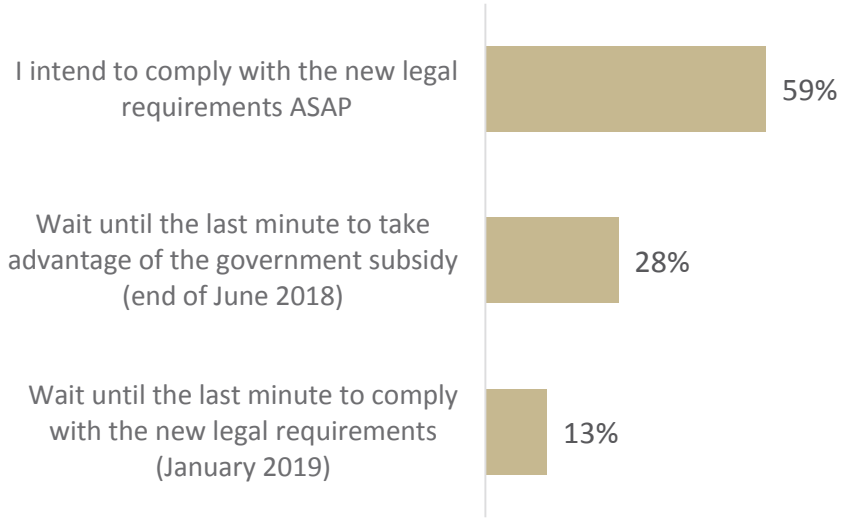
A8a. *Government subsidies are available to upgrade insulation of rental properties via the program Warm Up New Zealand: Healthy Home until the end of June 2018. Which of the following statements best describes how much you know about it?* ***Base:*** *Total sample (n=245)*

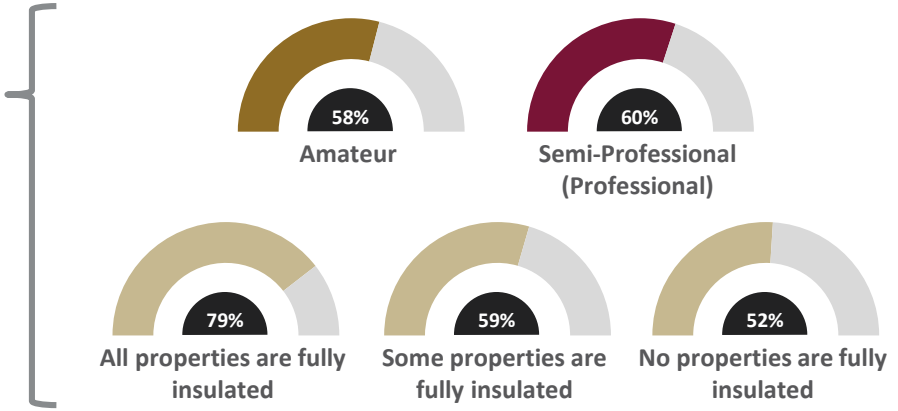
GAME CHANGERS

Landlord

When presented with WUNZ subsidy offer and RTA requirements, ~60% of landlords report they will comply ASAP, which shows a role for communications

Intention to comply with legal requirements

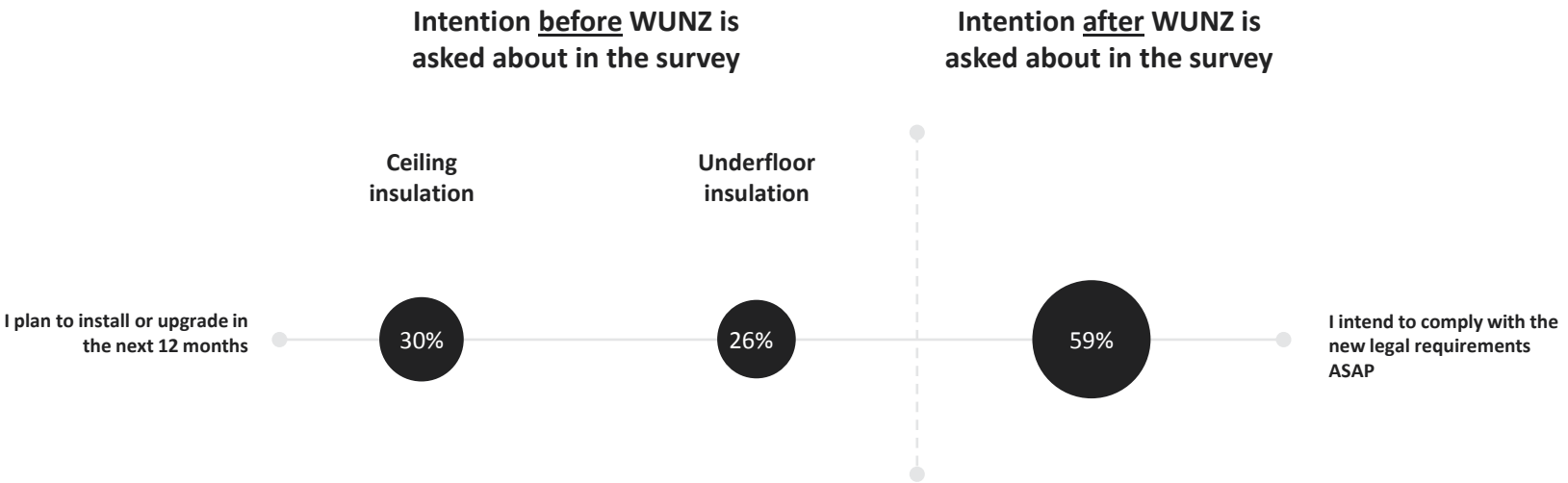




Those who are going to wait until the last minute are more likely to be in the insulation groups that have some or no properties insulated

A9a. *Considering the new legal insulation requirements and the availability of a government subsidy for the next 18 months only, does your intention to install ceiling / underfloor insulation…* ***Base:*** *Total sample (n=245)*

Stated intention to upgrade ceiling / underfloor insulation almost doubles once people are informed of the WUNZ subsidy offer

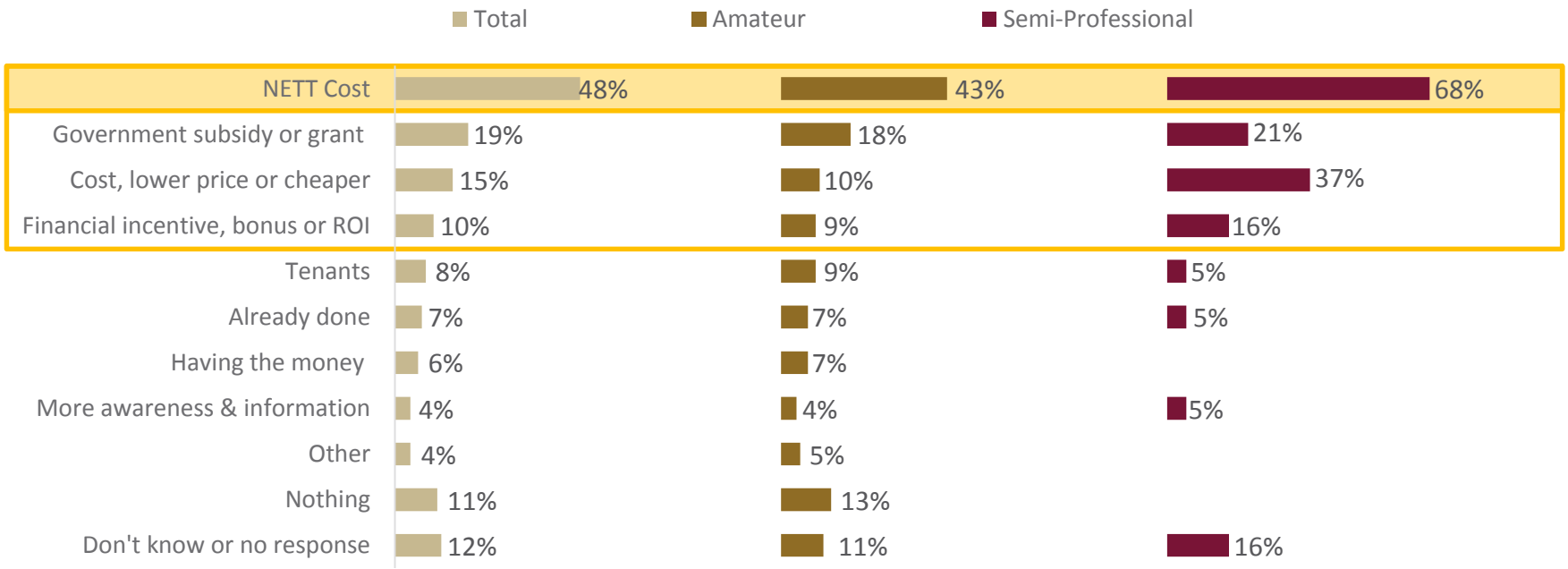


A9a. *Considering the new legal insulation requirements and the availability of a government subsidy for the next 18 months only, does your intention to install ceiling / underfloor insulation…* ***I1.*** *Which of the following best describes your intention to install or upgrade the insulation in your own house and / or your rental?* ***Base:*** *Property level (ceiling: n=152, underfloor: n=186)*

Landlord

41% said they would wait until the last minute to install or upgrade insulation. Options to assist with reducing the cost will motivate landlords to install quicker

What would motivate you to install insulation sooner rather than later?

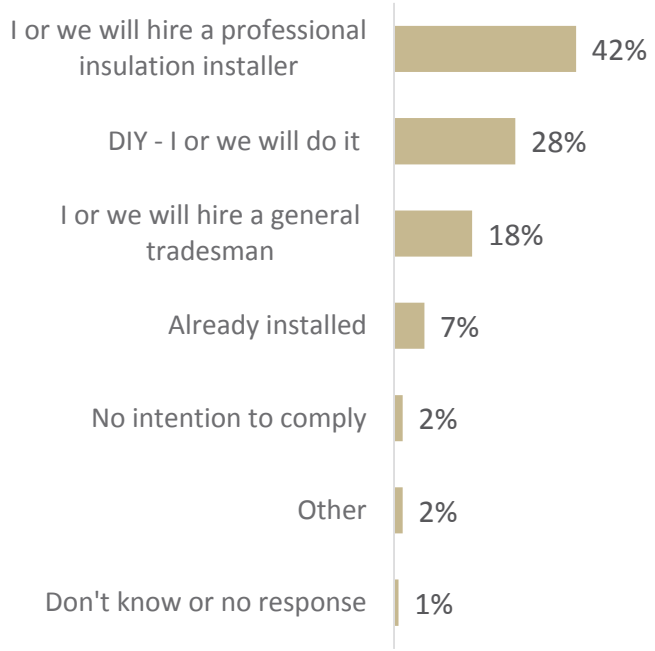


A9b. *What would motivate you to install insulation sooner rather than later?* ***Base:*** *Those who will wait until last minute to take advantage of the subsidy or to comply with the new legal requirements (n=101)*

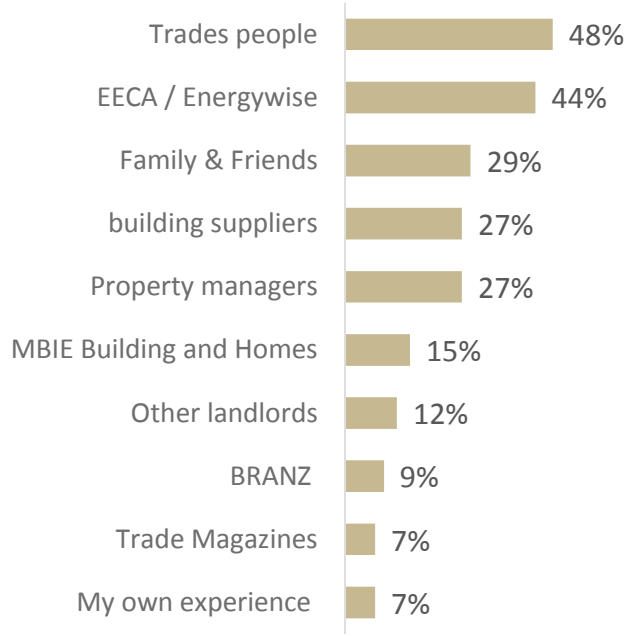
Landlord

Professional installers & trades people will be a route for landlords to ensure they comply, therefore are a channel to engage with making aware of WUNZ subsidy

How do you intend to comply?



Sources of information



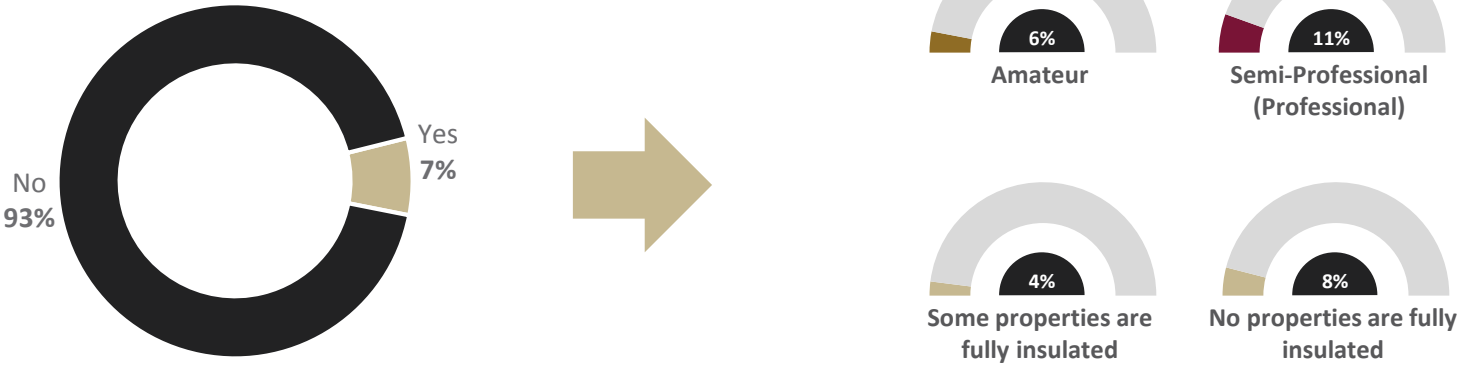
A10. *How do you intend to ensure you comply with the new insulation requirements.* ***IS1.*** *If you were seeking advice / information about installing / upgrading the insulation of your rental properties who would you seek information from?* ***Base:*** *Total sample (n=245)*

GAME CHANGERS

Landlord

Tenants are not a strong prompter for landlords to get their properties properly insulated

Did your tenants asked you to improve insulation in their rental unit?



MB4a. Did your tenants asked you to improve / install insulation in their rental units? ***Base:*** *Total sample (n=196)*

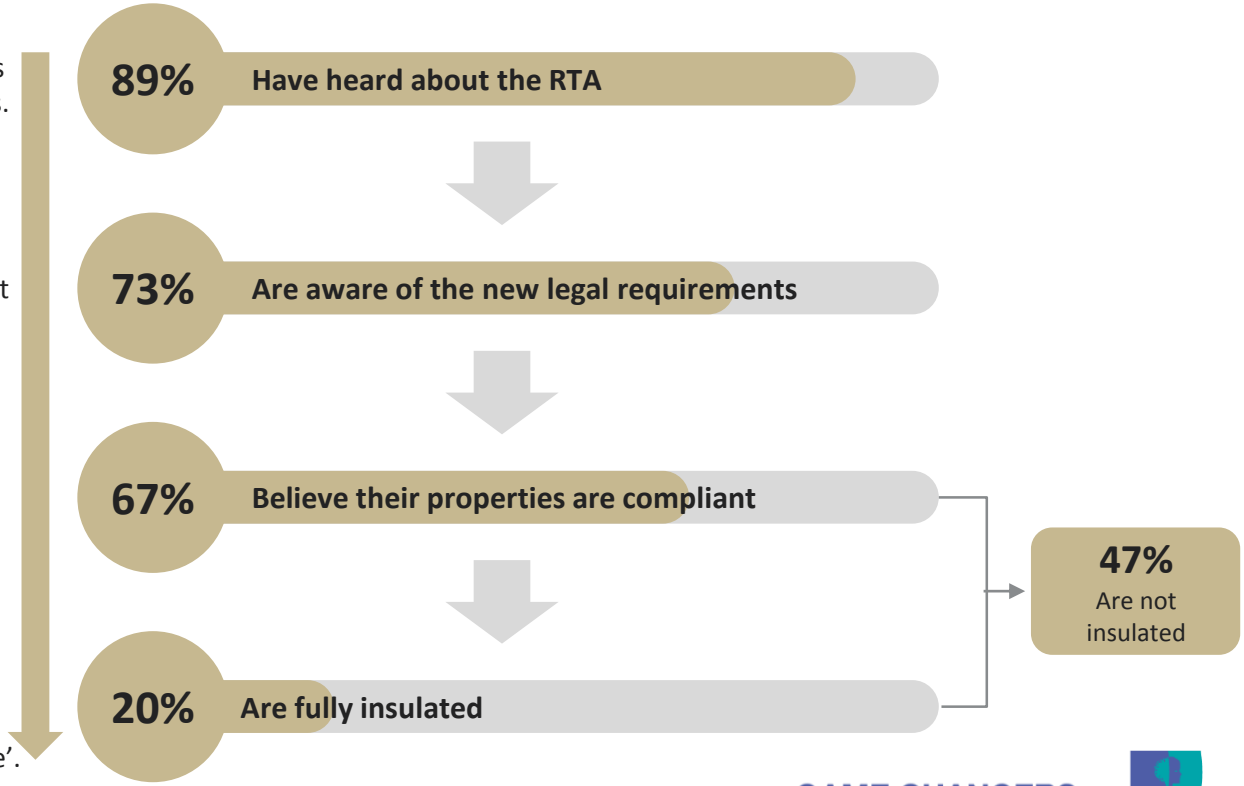
A high proportion are not fully cognizant of RTA requirements, with nearly half believing properties are compliant with insulation standards when they are not

Most landlords have heard of the RTA, which means there is no need to educate the market that it exists.

Close to three-quarters claim they are aware of the legal requirements, which again suggests the market is well-informed.

Two-thirds believe their properties are compliant with RTA requirements.

However, when self-reported insulation status is checked against compliance, this is not the case. A high number will unknowingly be not compliant, unless prompted to check, which could be a major obstacle to overcome if they believe the 'job is done'.



The high level of confidence to comply with requirements presents potential problems that need to be addressed

83% confidence

Most landlords are confident that they will meet the requirements of the RTA by 2019, but given current low levels of compliance in regards to insulation, this could mean the following:

1. Given they are unaware their properties are not compliant due to insulation, they could be caught out.
2. Between now and 2019 deadline, there could be a huge rush to insulate to meet requirements that the market may not be able to manage if it occurs within a short space of time.

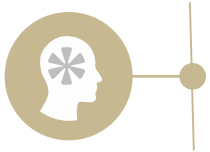
WUNZ awareness can be improved to ensure more landlords are motivated to take up the offer, and when made aware it is a clear motivator to install ASAP.

- Particularly given that cost reduction is reported as one way to motivate them to install sooner rather than later.
- This could also assist with bringing forward insulation intention and smooth out any demand in the market.

Specialist installers could possibly be one of the key channels that could be used to inform and comply, along with EECA / ENERGYWISE who is the second most important key information source.

Final summary and conclusions

Lack of compliance with RTA and lack of knowledge of WUNZ subsidy presents an opportunity for EECA/ENERGYWISE to educate the landlord market



Despite stated knowledge and compliance with RTA, actual (and self-reported) property insulation status indicates there is a major disconnect and a large number of landlords will not be compliant

This could be a potential block to engagement with any RTA messaging and therefore communications would have to break through this by inertia by highlighting the fact that many landlords are assuming they are compliant when they are not.

There is, however, an openness to compliance as when landlords are presented with the insulation requirements of the RTA stated importance of having an insulated property and stated intention to upgrade is high.

- This suggest that messaging can trigger action, although the exact extent of that action is difficult to forecast.
- Hence, wrapping up messaging with layers of non-compliance (stick), tenant benefits (emotion) and not missing out on potential subsidy (loss aversion) may provide additional impetus to actually taking action.

WUNZ subsidy availability also needs promoting, as there tends to be a relationship between knowledge and intention to upgrade insulation.

Professional installers are one potential route for landlords to check that they comply (and potentially upgrade), and could also play a role communicating WUNZ subsidies, but there could be issues regarding trustworthiness

Property managers are also an avenue to specifically target semi-professional landlords.

Both amateur and semi-professional landlords present opportunities and challenges that EECA/ENERGYWISE can address to achieve compliance by 2019

AMATEUR (80%)

In general, amateur landlords require more support and guidance regarding how to ensure their rental properties are RTA compliant and that assistance is available (e.g. WUNZ) should they qualify

- EECA / ENERGYWISE is well placed to deliver this message as it is already a source for providing information regarding insulation and 'mass media' is one of the dominant channels that amateurs use to keep up to date.

Amateurs are also less compliant with insulation requirements for their rental properties compared to semi-professionals, which means they will be a harder group to shift.

- Any campaign would need to highlight that underfloor insulation is key requirement of the RTA and to be exempted the underfloor of the property has to be 'truly inaccessible' or they run the risk of not being compliant.

SEMI-PROFESSIONAL (20%)

Semi-professional landlords require less guidance in ensuring their rental properties are compliant with the RTA.

They show higher levels of awareness about the current and new insulation legal requirements. As well as higher levels of compliance.

Semi-professional landlords show higher levels of motivation with many indicating that it is important to be fully installed and that they intend to comply with the new legal requirements ASAP, so they will be an easier group to shift.

Most of these landlords are on their way to meet the deadline of being fully insulated by 2019. This means that EECA can focus raising awareness of WUNZ and leverage the cost reduction benefit to motivate them to install insulation sooner rather than later.

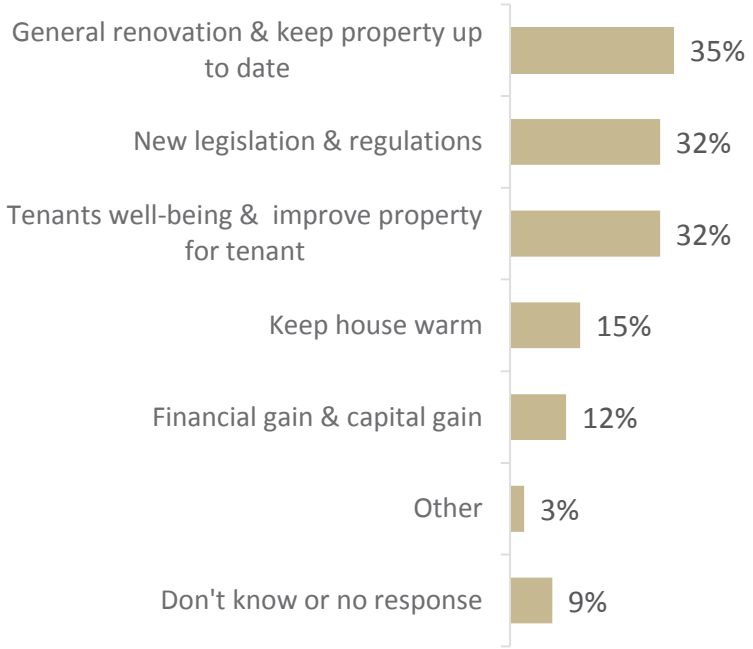
Functional (compliance) and emotional (tenant benefit) benefits of compliance would be an effective combination in communicating the need to insulate, as these are current drivers for both landlord types.

Appendix:
Fully insulated landlords

Landlord

Landlords would have recently installed insulation to keep their properties up to date, follow new legislation and for the well-being of their tenant

What prompted you to install or upgrade insulation? - Spontaneous



"We were upgrading the property so it was a good time to do it."

"Get the job done now and improve the property for the tenant."

"To make the place warmer for the tenants. The tenants are good so I want to look after them."

"Was aware that laws were coming in and we wanted to keep property up to standard for tenants."

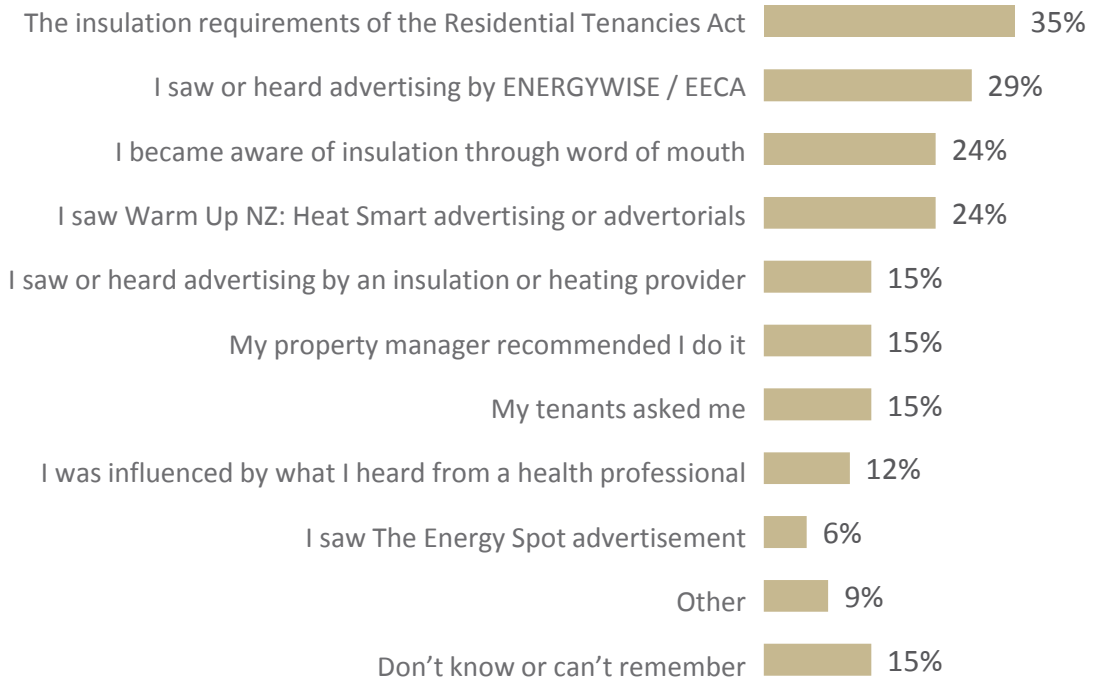
"Needed doing and the law was about to change."

*FI1. You mentioned installing / upgrading insulation of your rental property / ties in the past 12 months. What prompted you to make that decision? **Base:** Those who have fully installed insulation in the last 12 months (n=34)*

Landlord

Their decision to install insulation would have been influenced by the new legal requirements of the RTA, as well as some advertising by ENERGYWISE or EECA

What influenced you to install insulation?

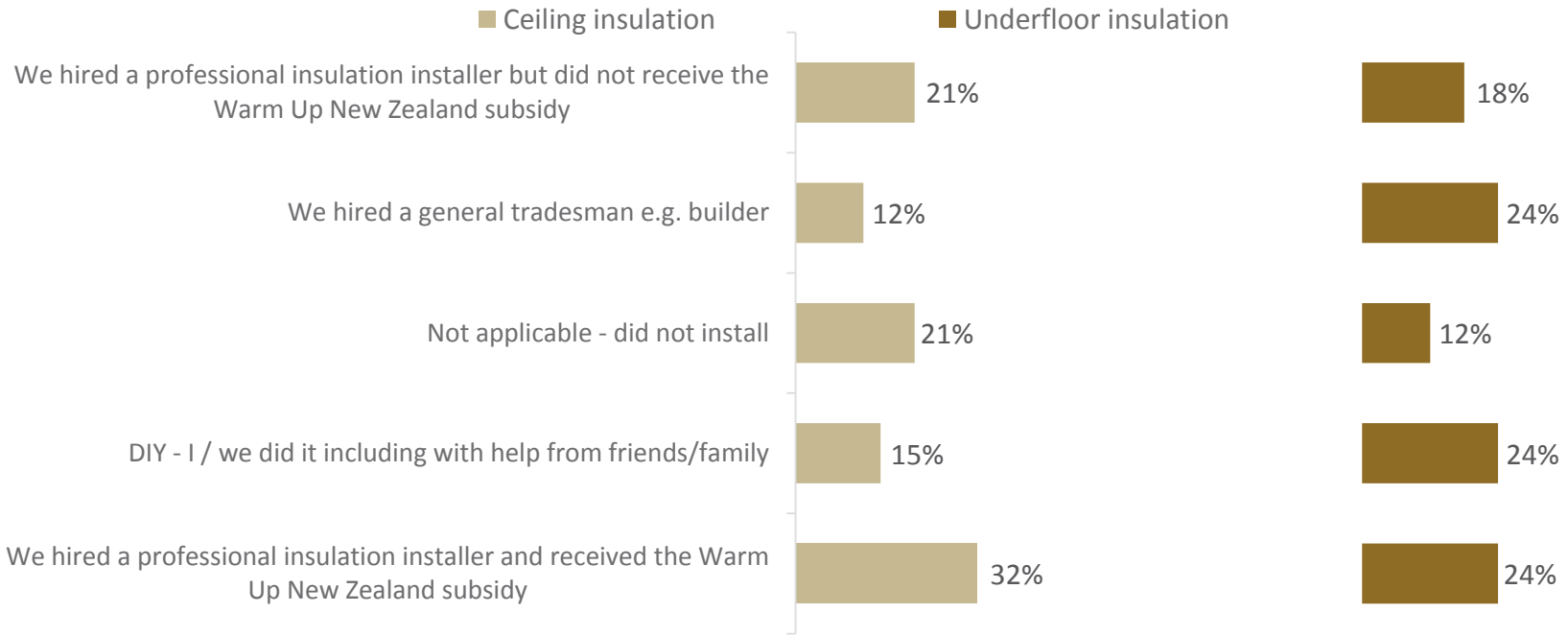


FI2. *Which of the following did you see or hear that influenced you to install insulation?* ***Base:*** *Those who have fully installed insulation in the last 12 months (n=34)*

Landlord

In general, these landlords would have hired a professional insulation installer or a tradesman to manage installation of ceiling or underfloor insulation

How did you manage the installation of the new insulation?

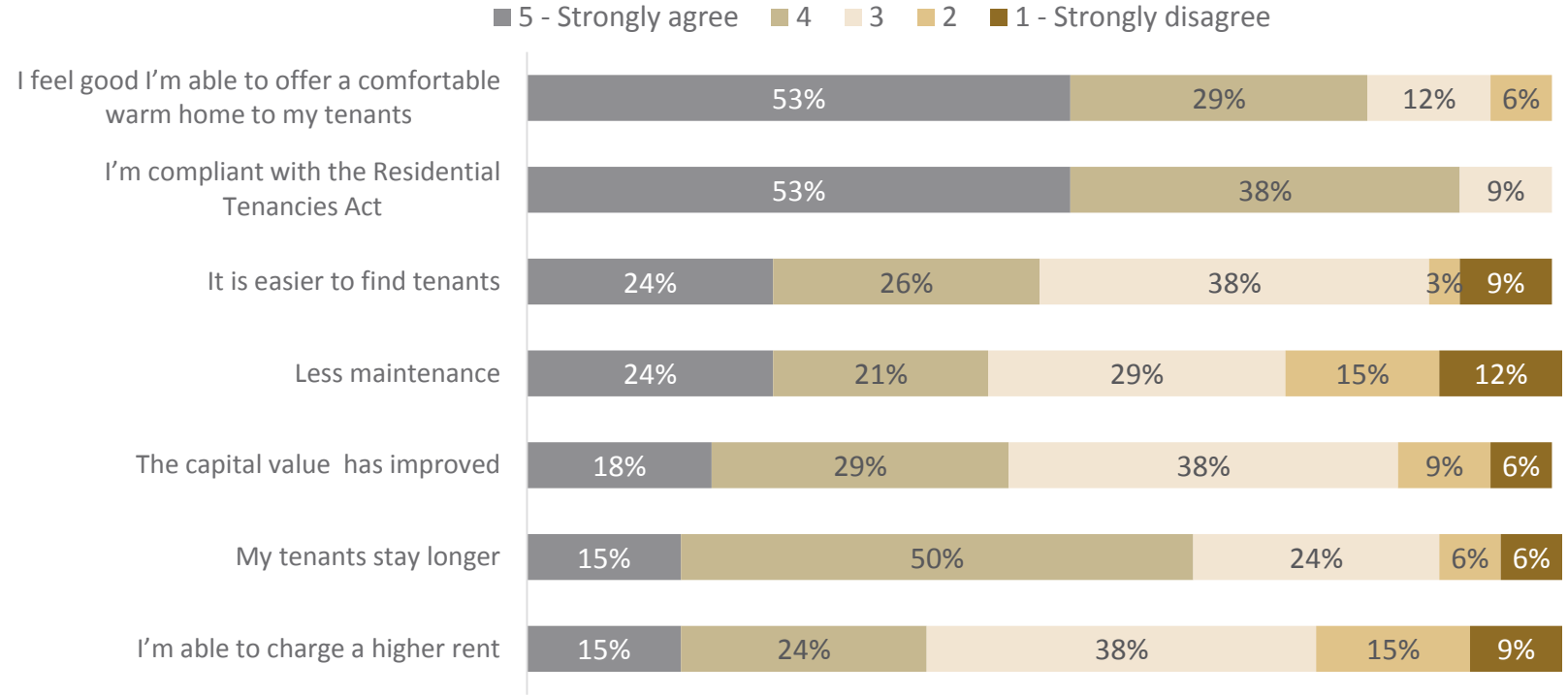


FI3. And how did you manage the installation of the new insulation? ***Base:*** *Those who have fully installed insulation in the last 12 months (n=34)*

Landlord

The statements agreed upon by landlords as being a result from installing insulation are compliance with the RTA and offering a warm home for tenants

The result from installing or improving insulation in your rental properties



FI4. As a result of installing / improving the insulation of your rental properties, to what extent do you agree with the following statements. ***Base:*** *Those who have fully installed insulation in the last 12 months (n=34)*

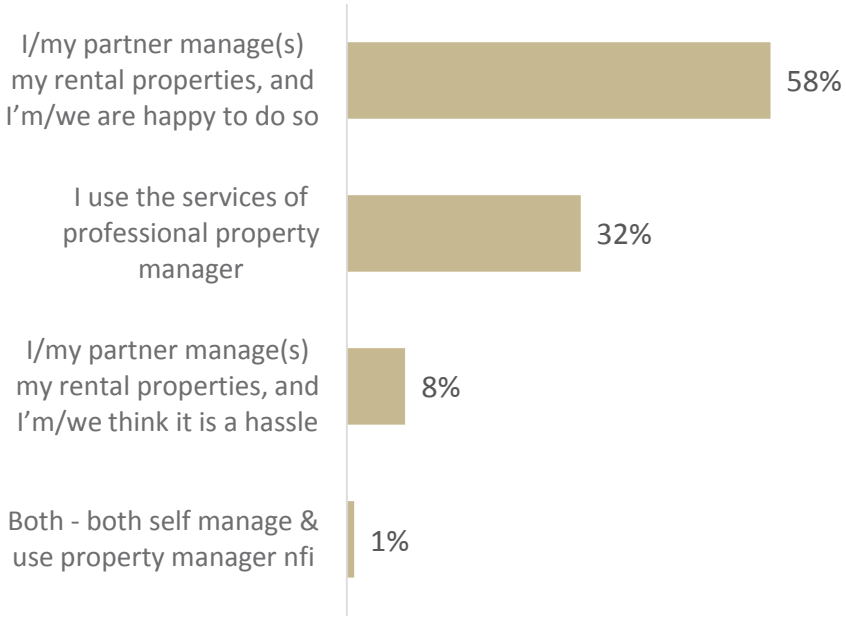
GAME CHANGERS

Appendix:
Priorities for managing rental properties

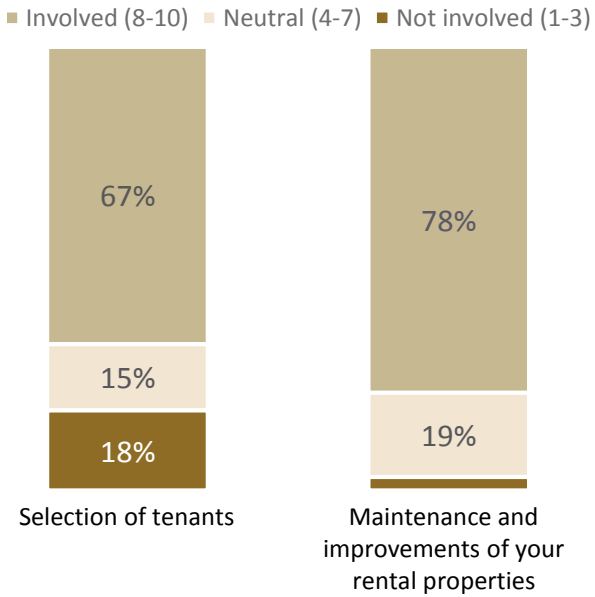
Landlord

Most respondents manage their own rental properties and feel that they are involved in the selection of tenants and maintenance of their properties

Which of the following best describes how you manage your rental properties?



How involved are you with the decisions regarding the…?

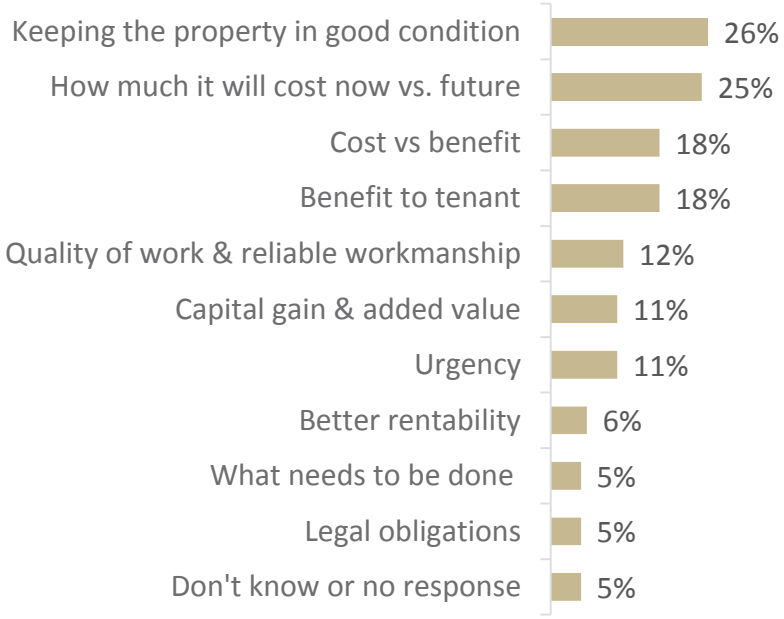


P1. *Which of the following best describes how you manage your rental residential property / properties?* ***P2.*** *How involved are you with the decisions regarding the…?* ***Base:*** *Total sample (n=245)*

Landlord

Most of the factors considered by landlords are to do with the condition of the property and future benefits and costs

Factors to consider when improving or upgrading rental property



*Note: Only showing results above 5%

"Minimise the cost but keep the home in good shape and comfortable for the tenants."

"Whether the current renter is away or happy for me to do repairs. Weather."

"What the job is and how much it will cost."

"Work that needs to be done; improvements that will make the property better; easier to maintain in future etc."

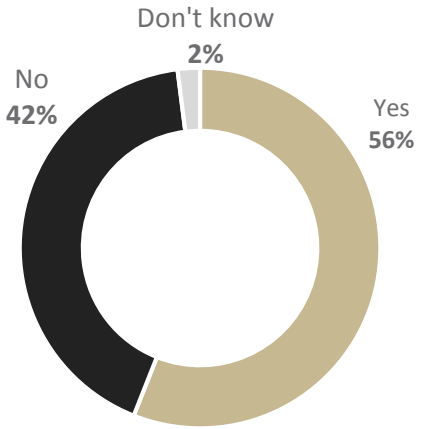
"Best quality materials and workmanship within our budget and checking references if a new contractor."

P3. *What factors do you consider when choosing to maintain or improve your rental properties?* ***Base:*** *Total sample (n=245)*

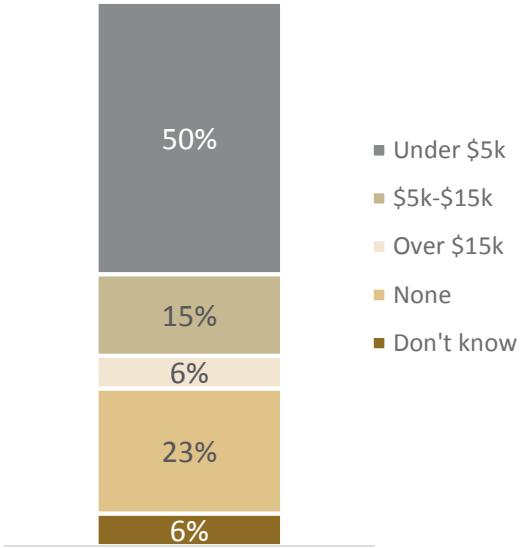
Landlord

Over half of landlords set money aside for maintenance or renovations of their rental properties, most would set aside under $5k per year

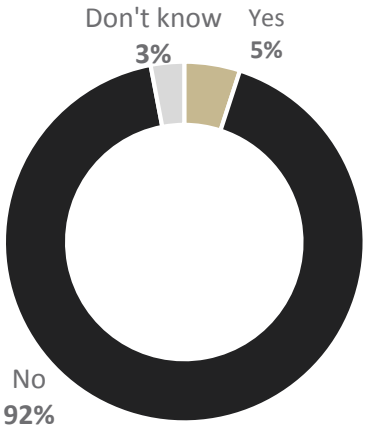
Do you set money aside?



How much money do you set aside?



Are you a member of PIA

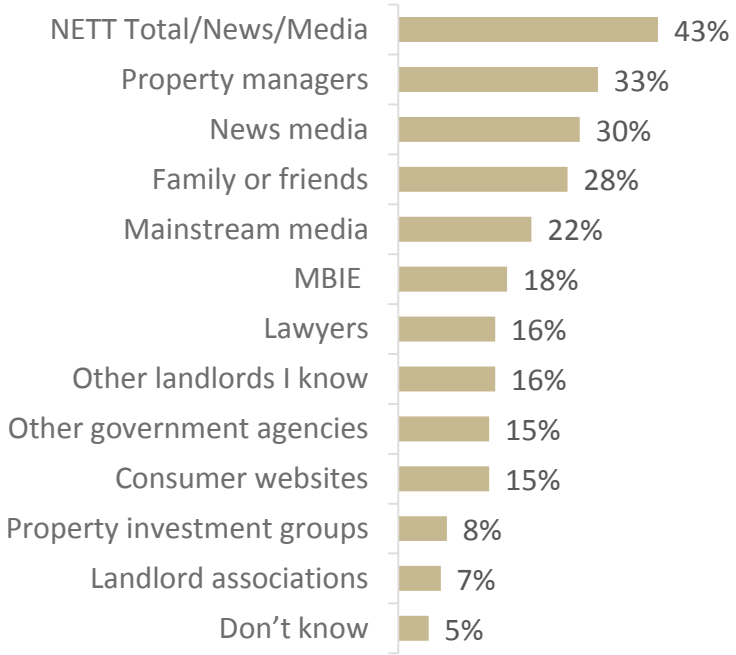


P4. Do you regularly set aside money for maintenance or renovations of your rental properties? P5. Please estimate how much you set aside yearly across all your rental properties? P6. Are you a member of PIA (Property Investors Association). Base: Total sample (n=245)

Landlord

People consult a wide variety of sources but news and media are still the most prominent source of information

Influential information when making a decision – in relation to tenant

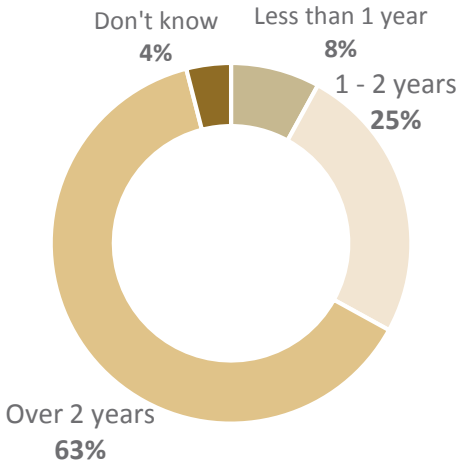


P7a/b. *Which sources of information are most influential when making a decision about your rental properties?* ***Base:*** *Total sample (n=245)*

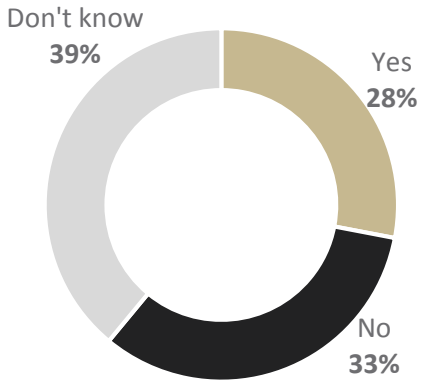
Landlord

At the total level, most tenants stay over 2 years and almost a third hold a CSC. Also, landlords are more likely to see their tenants as customers

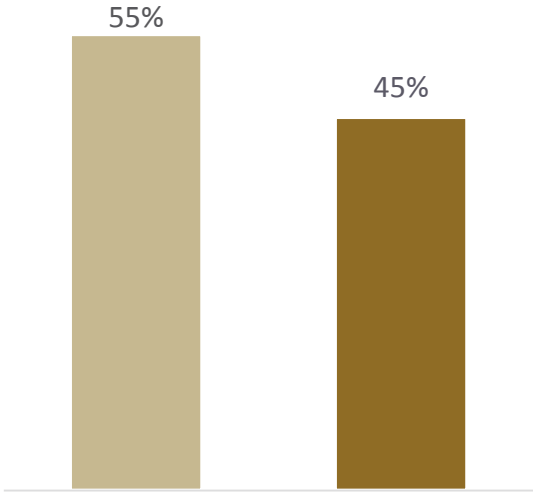
How long do your tenants stay?



Does your tenant have a CSC?



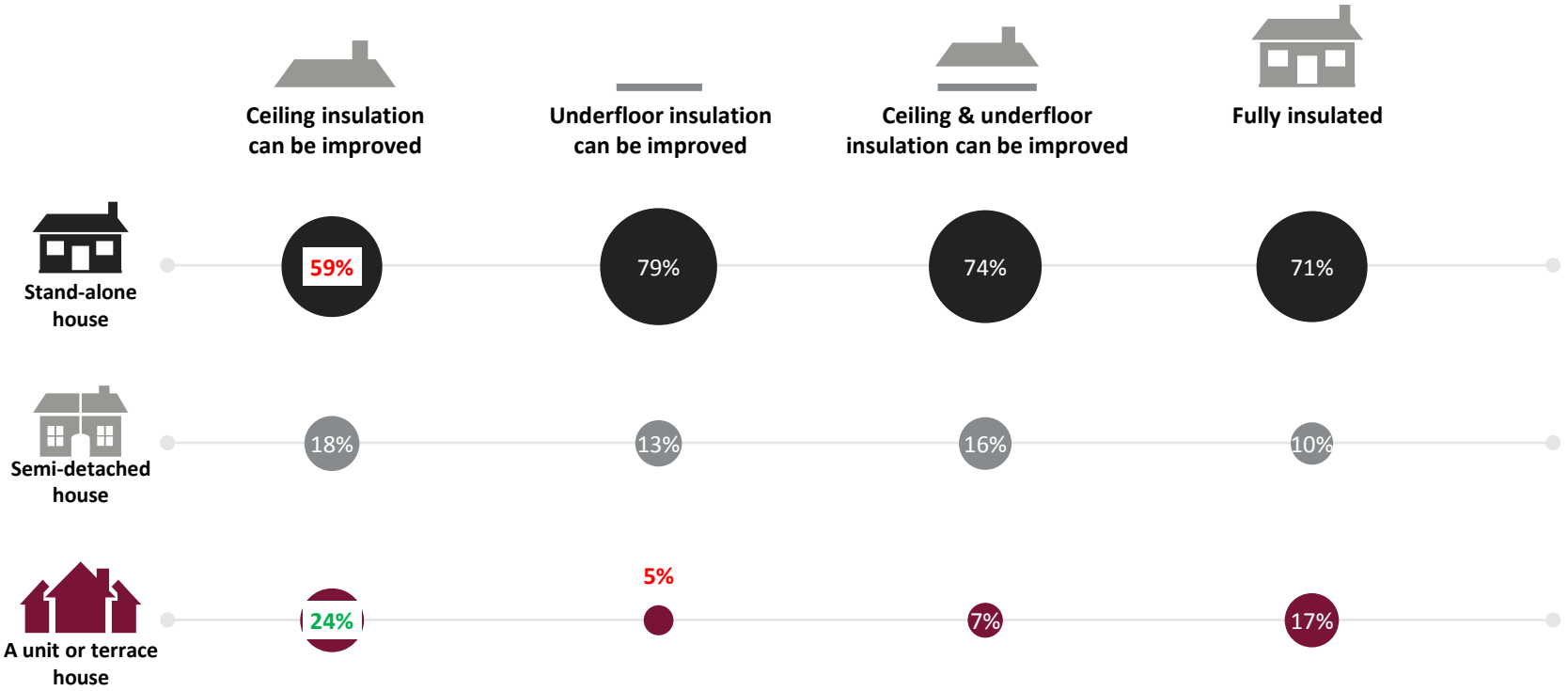
My tenants are….



T1. On average, how long do your tenants stay? T2. To your knowledge, do any of your (current / recent) tenants hold a Community Services Card? T3. Which of the following statements would best describe how you view your tenants? Base: Total sample (n=245)

property

Those who can improve their ceiling insulation are more likely to have a unit or terrace house



Green is sig. ↑ and Red is sig. ↓ compared to the total sample

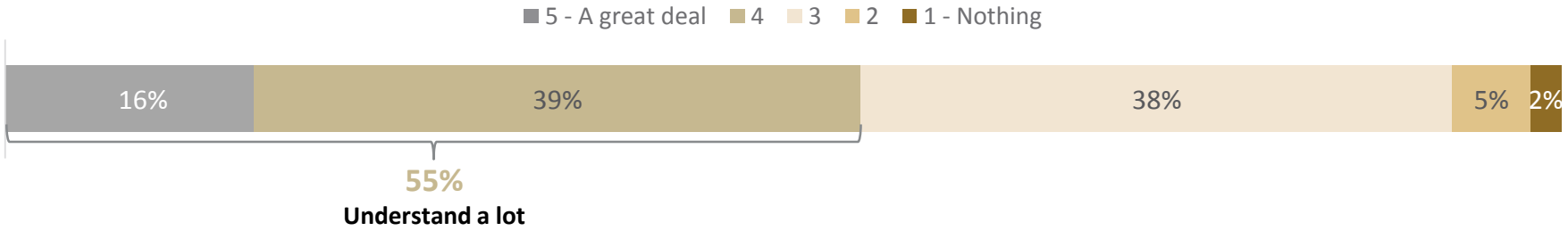
Base: *ceiling insulation can be improved (n=51), underfloor insulation can be improved (n=96), Ceiling and underfloor insulation can be improved (n=112), fully insulated property (n=154)*

GAME CHANGERS

Landlord

Over half of landlords claim to 'understand a lot' about the legal requirements in regards to their rental properties

How much do you know about your legal requirements?



How much do you know about legal requirements by segment

(Understands a lot 4-5)

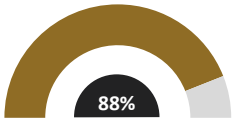
Green is sig. ↑ and Red is sig. ↓ compared to the total sample

A1. *Overall, how much do you feel you know about your legal requirements regarding rental properties?* ***Base:*** *Total sample (n=245)*

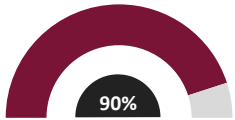
Landlord

Detailed awareness of the RTA and the new legal requirements

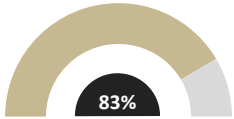
Awareness of the RTA by insulation status



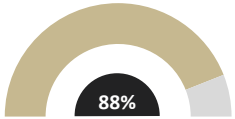
Amateur



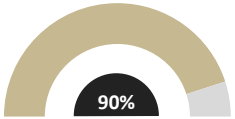
Semi-Professional (Professional)



All properties are fully insulated

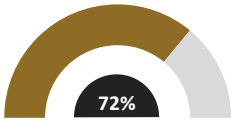


Some properties are fully insulated

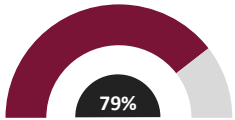


No properties are fully insulated

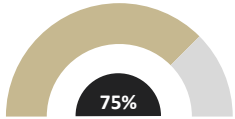
Awareness of new legal requirements



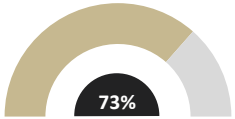
Amateur



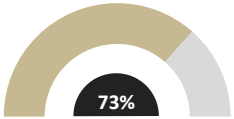
Semi-Professional (Professional)



All properties are fully insulated



Some properties are fully insulated

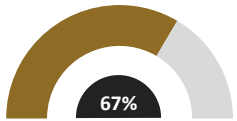


No properties are fully insulated

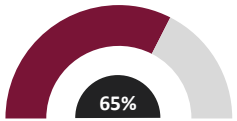
A2. Have heard about the Residential Tenancies Act? ***A3.*** *Are you aware of the new legal requirements for rental properties (since July 2016)?* ***Base:*** *Total sample (n=245)*

Property compliance amongst segments and insulation status

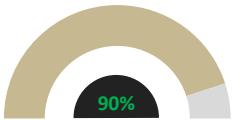
Property compliance



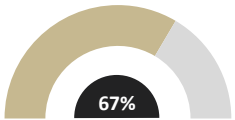
Amateur



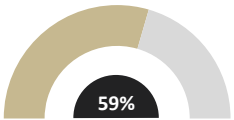
Semi-Professional (Professional)



All properties are fully insulated



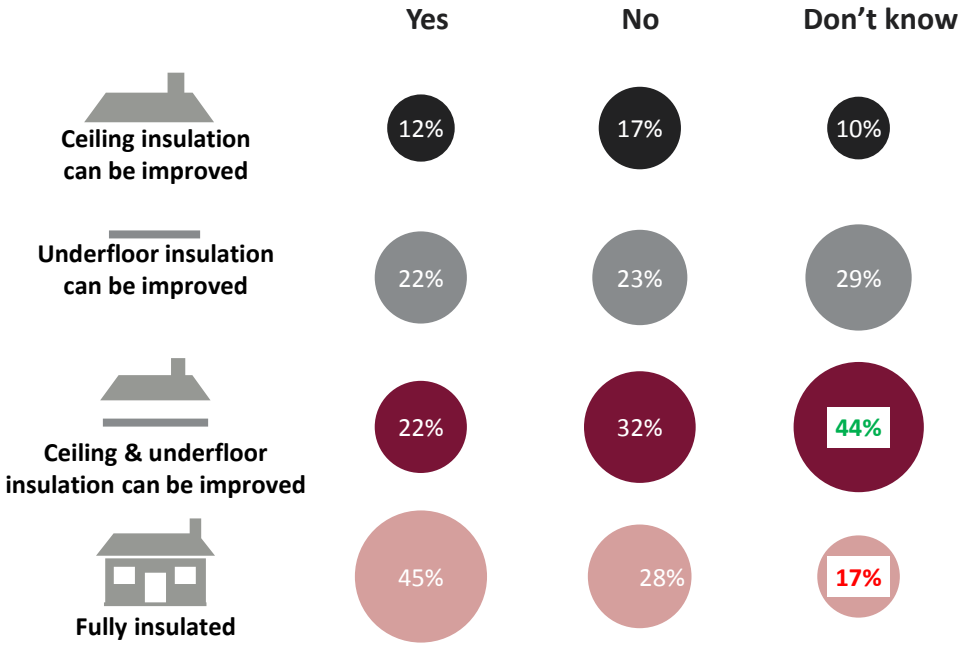
Some properties are fully insulated



No properties are fully insulated

*Note: To be included in this survey all must have some form on insulation within their properties installed in the last 24 months

Property compliance by rental property insulation status

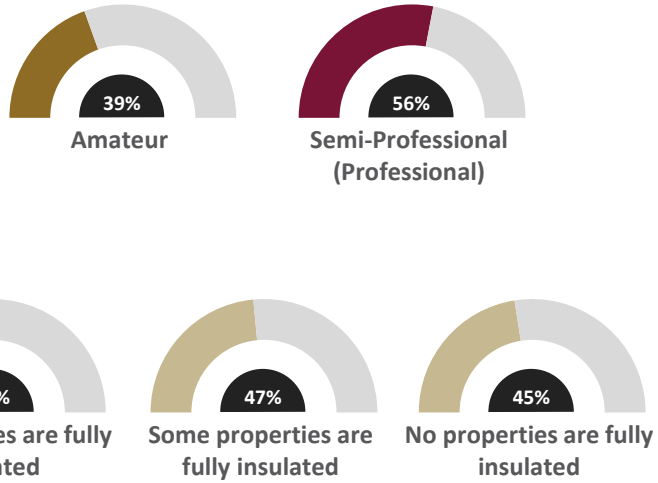


*A5. Based on your current knowledge, are your property rentals compliant with current legal requirements? **Base:** Total sample (n=245) **A5.** Based on your current knowledge, are your property rentals compliant with current legal requirements? **Base:** are your properties compliant: Total sample (n=245), property compliance by rental property insulation status (n=413)*

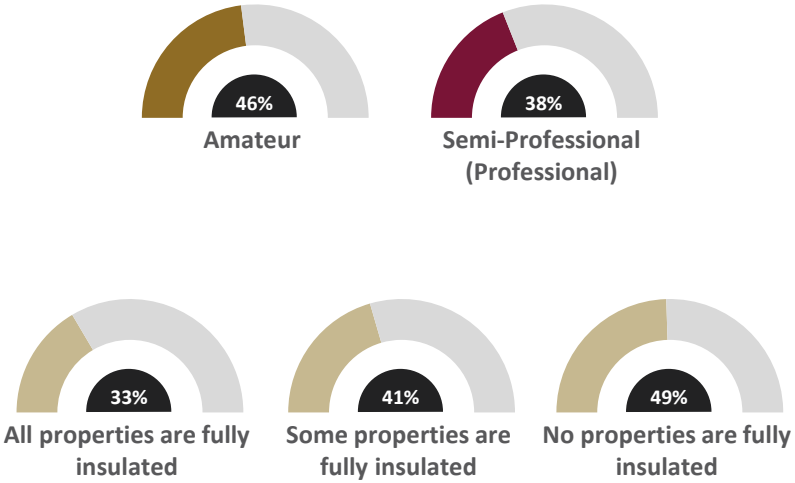
Landlord

Intention to hire a professional and using EECA/ENERGYWISE as a source of information by segments and insulation status

I or we will hire a professional insulation installer



EECA / ENERGYWISE as source of information



A10. How do you intend to ensure you comply with the new insulation requirements. ***IS1.*** *If you were seeking advice / information about installing / upgrading the insulation of your rental properties who would you seek information from?* ***Base:*** *Total sample (n=245)*

Demographic sample composition

Landlord

49% Male

51% Female

68% In a city
24% In a town
9% In a rural area

22% 20-39-year-olds

64% 40-64-year-olds

14% 65 years over

15% HH income <$60k

33% HH income $70k-$100k

38% HH income >$100k

14% Don't know / rather not say

2% Rest of Upper NI
40% Auckland City
29% Rest of Lower NI
10% Wellington
11% Canterbury
8% Rest of the SI

69% NZ European
5% Chinese
9% Other European
2% Pacific People
5% Maori
3% Indian
8% Other

13% HH with children under 5 years
17% HH with children between 5–13 years
16% HH with children over 14 year
35% Older couple – no children
9% Single / one person HH
5% Younger couple without children
6% Other

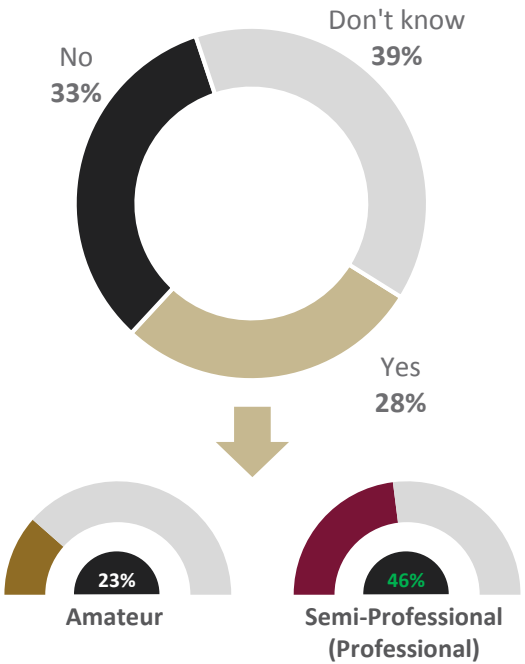
Base: *Total sample (n=245)*

Appendix: Community Services Card (CSC) Holders

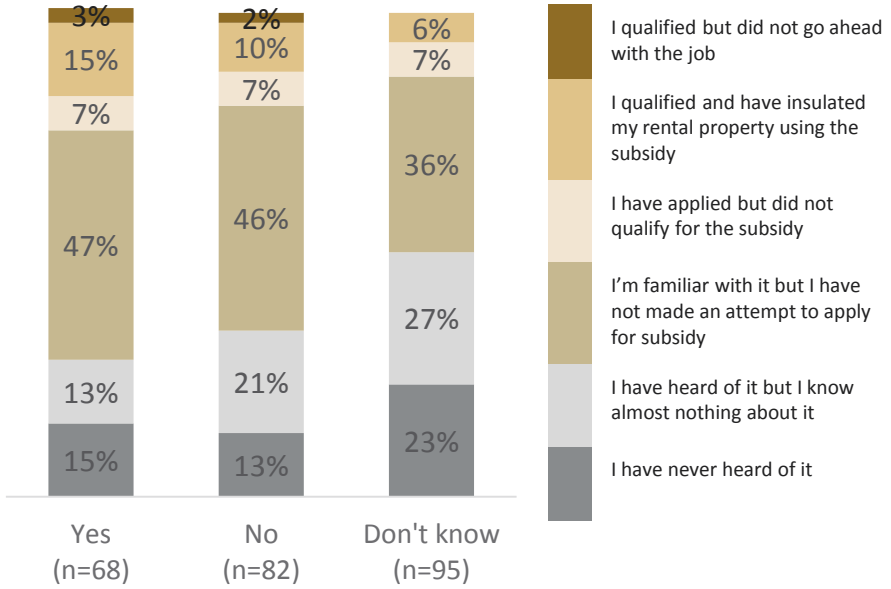
Landlord

A relationship exists between awareness of WUNZ and tenant's CSC status, but even among landlords who know the CSC status there is still a third that don't know

Does your tenant have a CSC?



Awareness of WUNZ if landlord is aware their tenant is a CSC holder



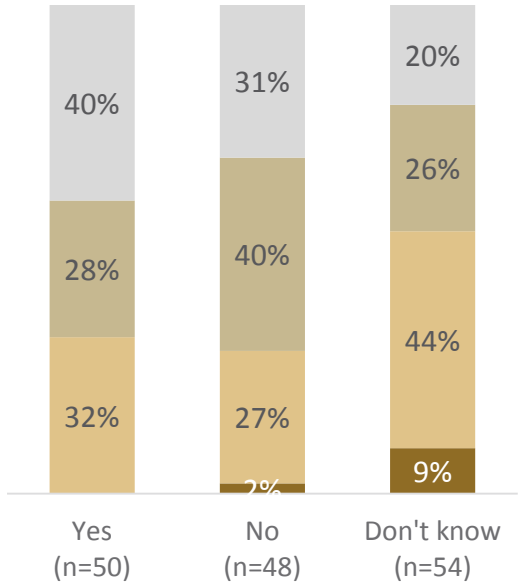
Green is sig. ↑ and Red is sig. ↓ compared to the total sample

T2. *To your knowledge, do any of your (current / recent) tenants hold a Community Services Card?* ***A8a.*** *How much do you know about WUNZ?* ***Base:*** *Does your tenant have a CSC (n=245)*

GAME CHANGERS

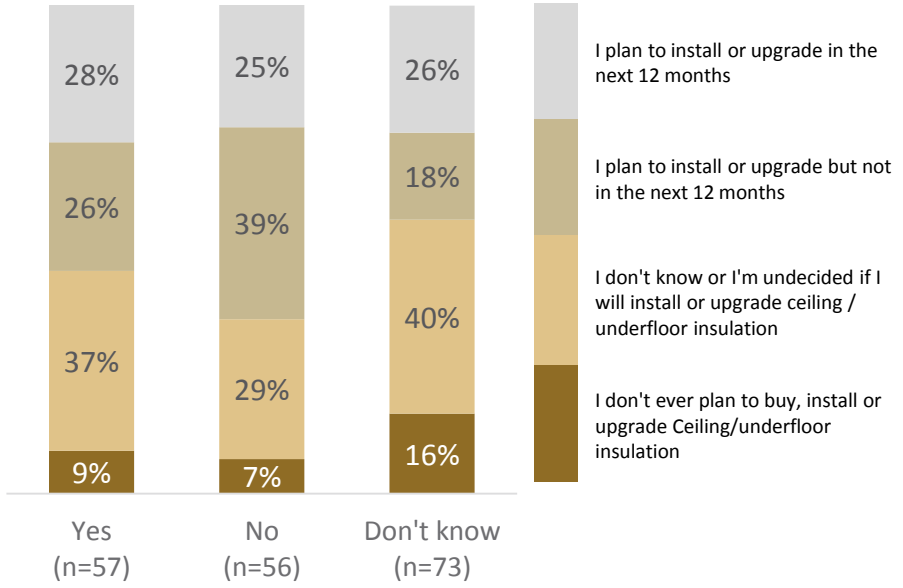
Appears to be a relationship between knowledge of tenants CSC status and intention to upgrade ceiling, although this pattern does not exist for underfloor

Intention to install ceiling insulation



Does your tenant hold a CSC?

Intention to install underfloor insulation



Does your tenant hold a CSC?

Green is sig. ↑ and Red is sig. ↓ compared to the total sample

T2. *To your knowledge, do any of your (current / recent) tenants hold a Community Services Card?* ***I1.*** *Which of the following best describes your intention to install or upgrade the insulation in your own house and / or your rental?* ***Base:*** *Ceiling: n= 152, underfloor: n=186*

Contacts

Information withheld
under section 9(2)(a)

GAME CHANGERS