

TNS Conversa

New Zealand Institute of Economic Research (NZIER)

Emissions Trading Scheme (ETS) Research

National Survey (Quantitative)

A summary of quantitative research amongst the general public

June 2008



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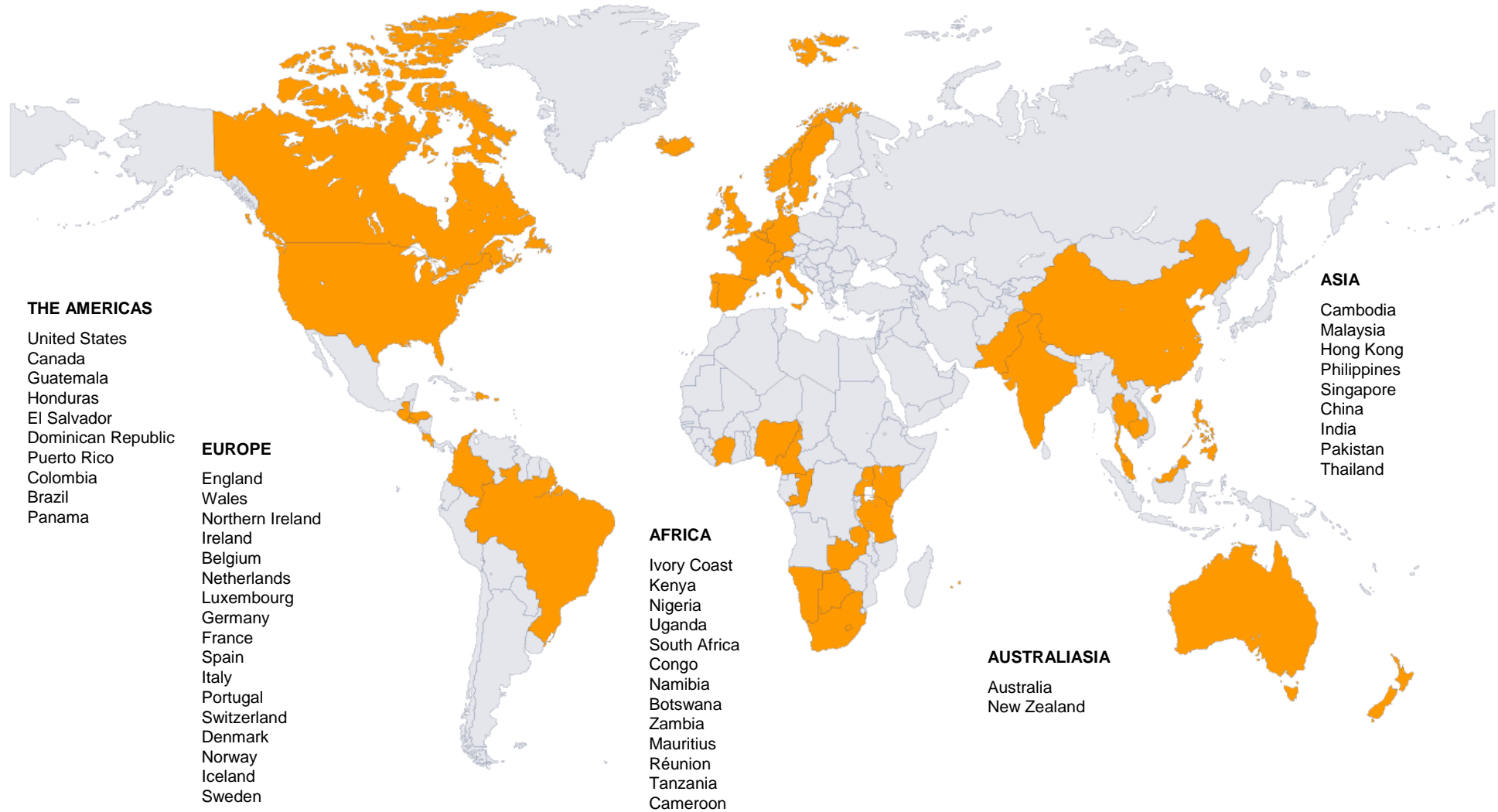
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1. TNS Conversa and Project Background

TNS Conversa is part of the TNS Group, which is the largest custom research organisation in the world

- TNS had global sales of £1.068billion in 2007
- TNS has offices in more than 80 countries across Africa, Americas, Asia Pacific, Europe and the Middle East.
- TNS employs more than 15,000 full-time staff worldwide.
- TNS is listed on the London Stock Exchange (TNS.L).
- TNS is the leading market research agency in most European countries. In the US, TNS is the largest custom research provider. In Asia, TNS has the strongest custom research network.

From its Auckland office, TNS Conversa operates in more than 50 countries and covers almost two thirds of the world's population



NZIER needs to understand the general public's opinion of the proposed Emissions Trading Scheme

Situation

- Although it is known that New Zealanders care about green issues, how significant are these compared with other life factors (jobs, income, etc.)?
- New Zealand currently produces 0.2% of the world's greenhouse-gas emissions
- New Zealand has a heavy reliance on agriculture which is responsible for 50% of the country's emissions
- The New Zealand economic climate is uncertain
- In its earlier study, NZIER identified that there are potentially many negative ramifications of this scheme (inflation, higher prices, job losses, etc.)
- However there are also many positives (world-leader status, perceived attributes of export products, air quality, tourism, immigration, etc)
- There is currently no comprehensive and current research that quantifies the state of the nation with regards to the Emissions Trading Scheme

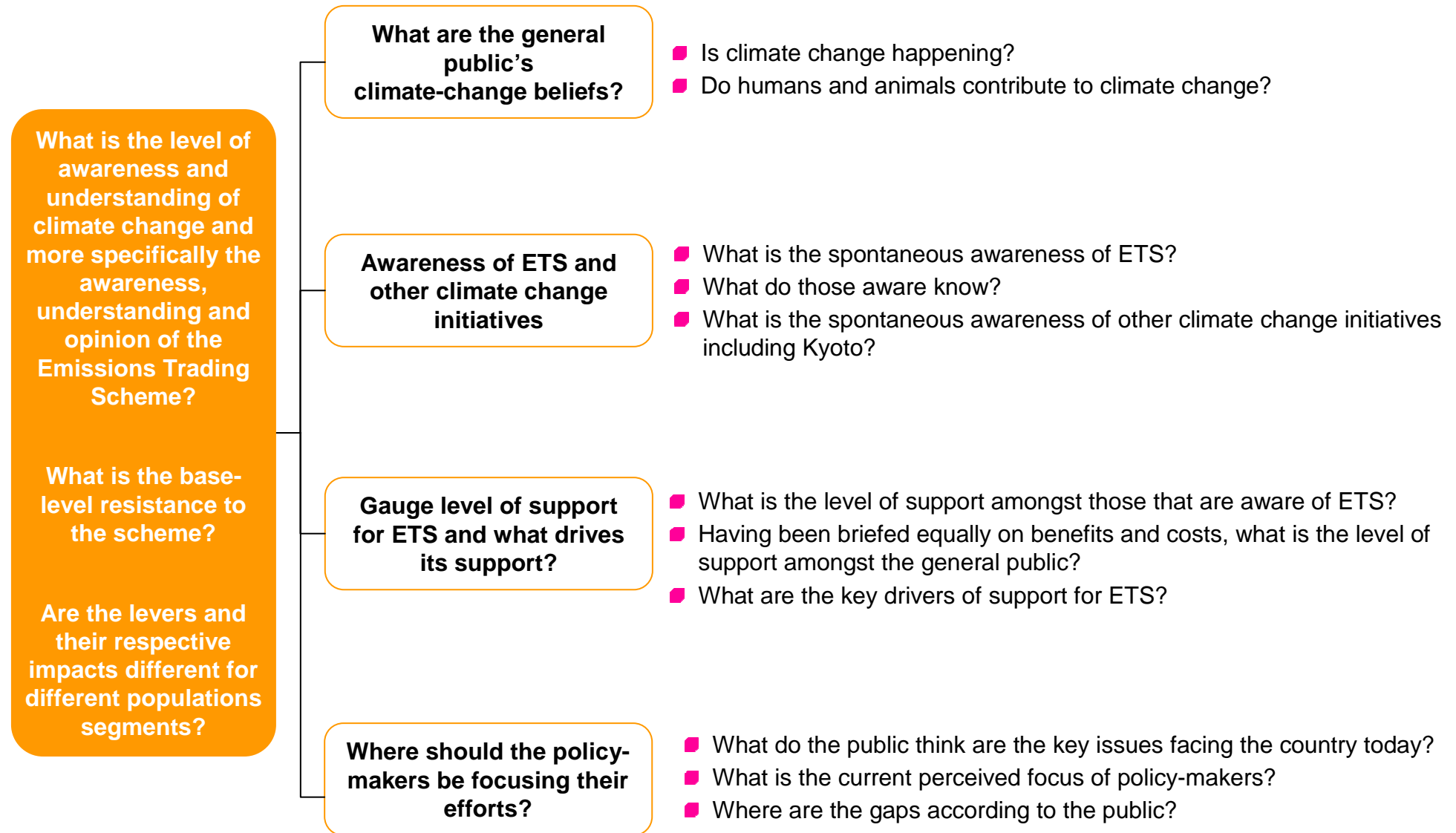
Complication

- NZIER requires New Zealanders' opinions on climate change and more specifically on the proposed Emissions Trading Scheme for the ongoing development of policy options

Resolution and Key Objective

- What is the awareness, understanding and opinion of the proposed Emissions Trading Scheme?

There are 4 key areas of focus for this research



2. Approach and Audience

An online survey methodology was used to assess the awareness, understanding and opinion of the proposed ETS

Approach

- An online survey was conducted between the dates of 4th and 10th June 2008
- Quotas were used to ensure that the final sample was nationally representative of the NZ population
- Occupation, household income and voting intentions were also collected to further ensure that our sample was nationally representative
- Where significance testing has been carried out, it has been calculated at the 95% confidence level
- The margin of error for the national sample is 3.1%

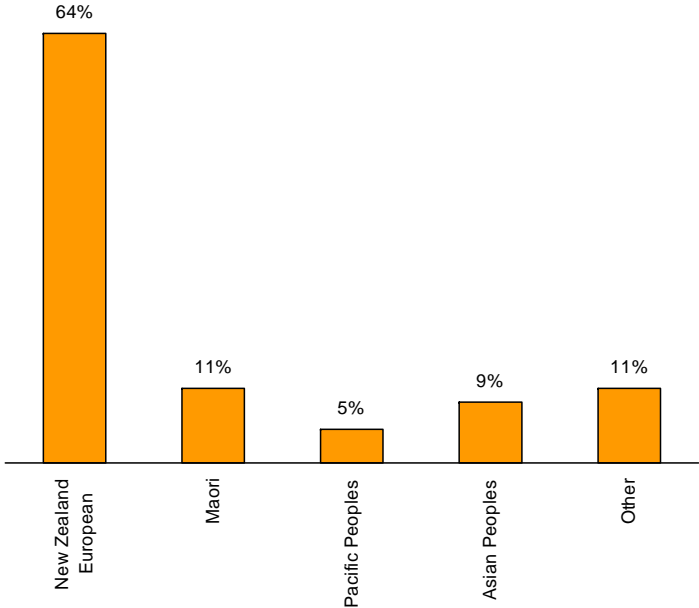
Audience

- Nationally representative sample of 1,003 members of the general public
- Quota variables that defined the sample were as follows:
 - Age
 - Gender
 - Ethnicity
 - Geographic Region
- Where relevant analysis has been weighted to ensure a nationally representative output

New Zealand Ethnicity and Age

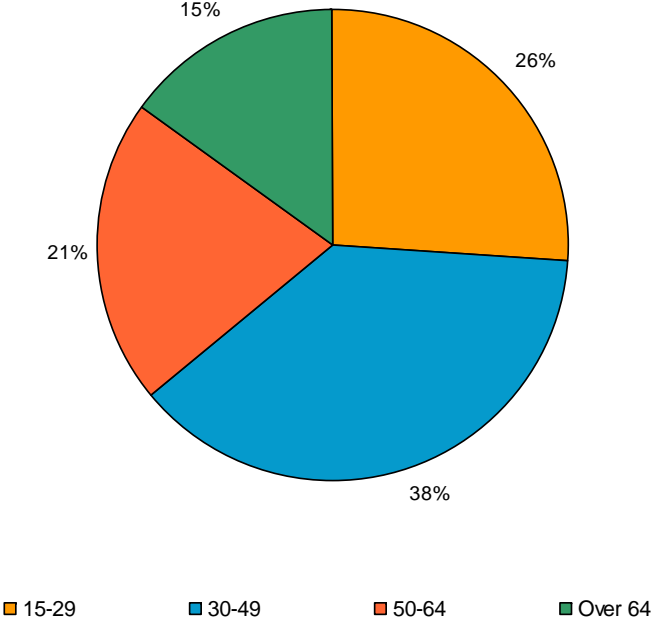
Ethnicity

- This break-down was used as a quota control to ensure a nationally representative sample



Age

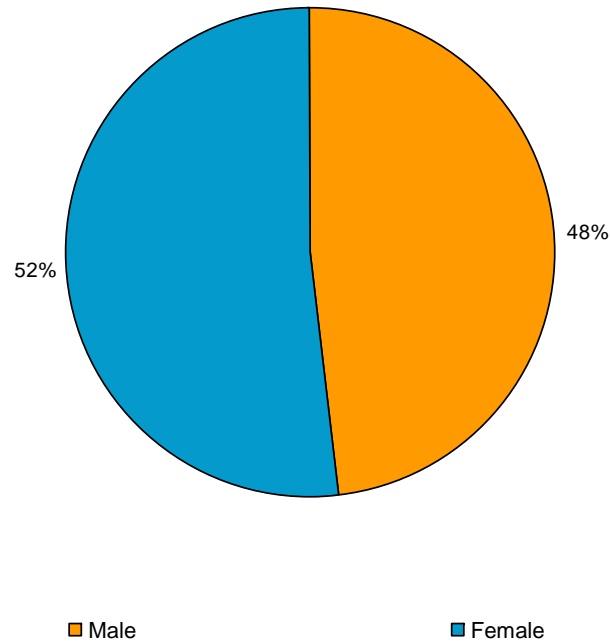
- This break-down was used as a quota control to ensure a nationally representative sample



New Zealand Gender and Region

Gender

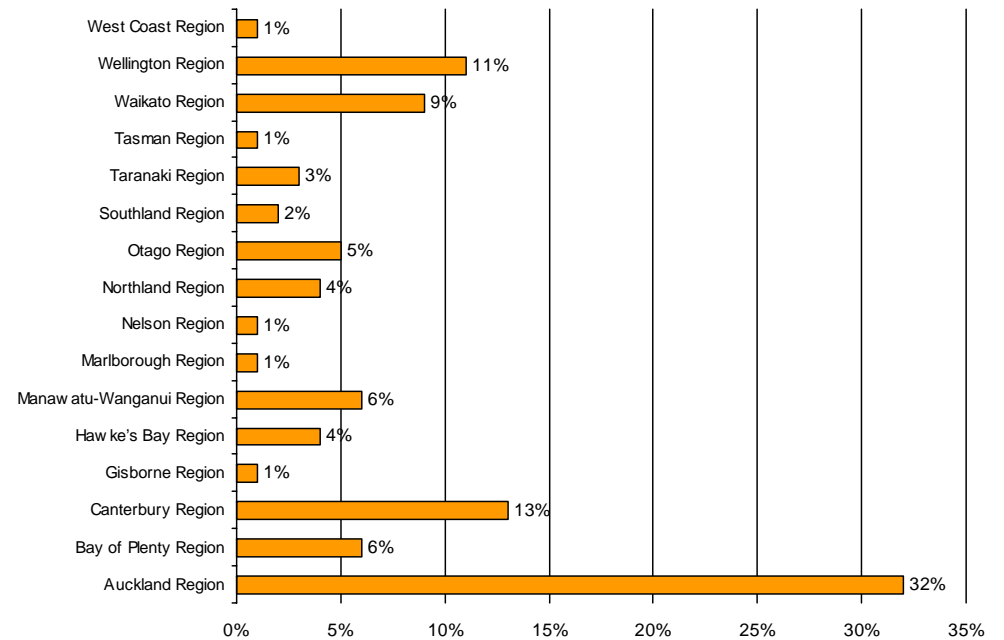
- This break-down was used as a quota control to ensure a nationally representative sample



Q: What gender are you?

Region

- This break-down was used as a quota control to ensure a nationally representative sample

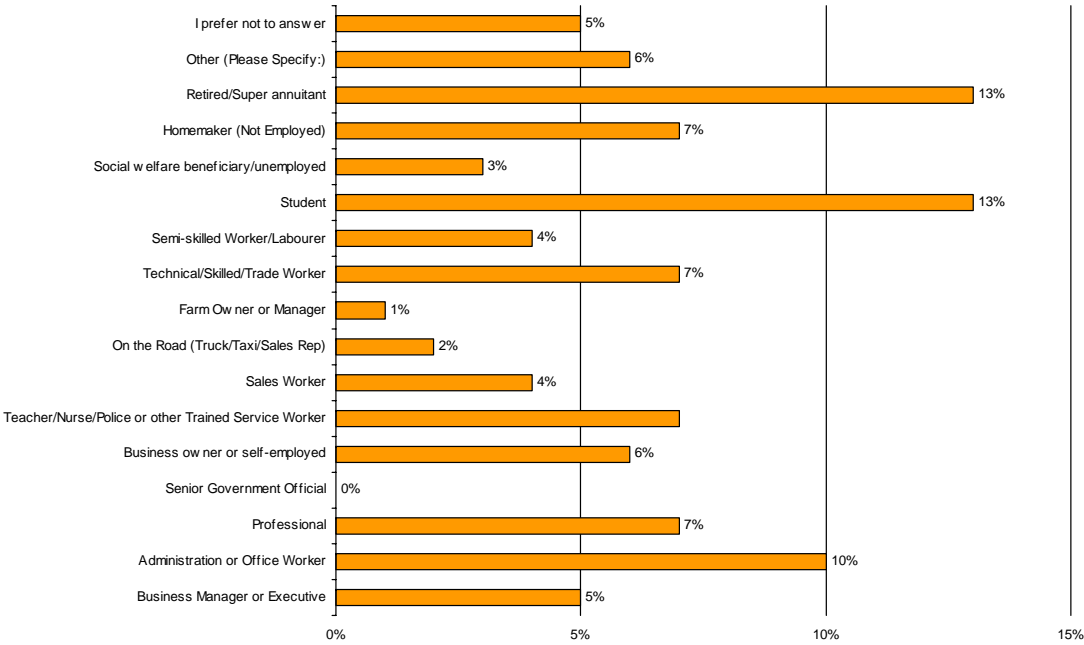


Q: In what region do you live? Please select one only

New Zealand Occupation and Household Income

Occupation

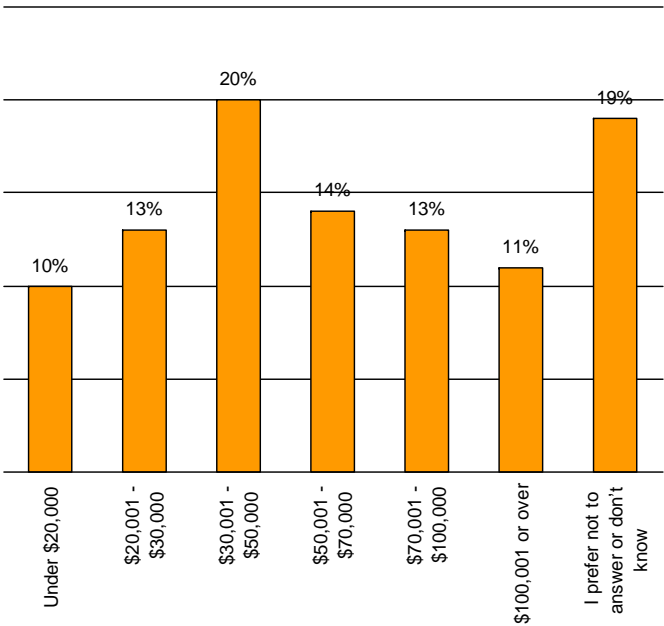
- **Although this break-down was not used as a quota control, it was collected to further ensure a nationally representative sample**
 - 13% of respondents were students
 - 13% of respondents were Retired or Super Annuitants
 - 10% were administration of office workers
 - 7% were professionals
 - 7% were Teachers/Nurses/Police or other trained service
 - 7 % were Technical/Skilled/Trade Workers



Q: Which of the following best describes your current occupation? Please select one only

Household Income

- **Although this break-down was not used as a quota control, it was collected to further ensure a nationally representative sample**
 - 19% of respondents declined to answer the income question – which is typical
 - The average household income band is \$30,001 to \$60,000

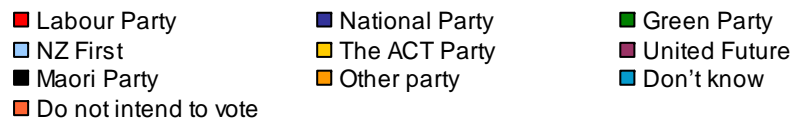
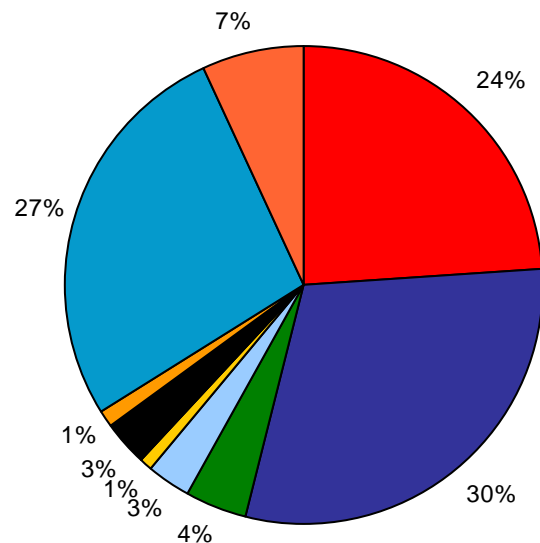


Q: What is your annual household income? Please select one only



New Zealand Voting Intentions

What Party do you intend voting for in the general election later this year?



Voting Intentions

- Although this break-down was not used as a quota control, it was collected to further ensure a nationally representative sample
 - 24% intend to vote for the Labour Party
 - 30% intend to vote for the National Party
 - 4% intend to vote for the Green party
 - 3% intend to vote for NZ First
 - 3% intend to vote for the Maori Party
 - 1% intend to vote for the ACT Party
 - Less than 1% intend to vote for the United Future Party

- 27% do not know which party they will vote for later this year
- 7 % do not intend to vote

Q: What party do you intend voting for in the general election later this year?
Please select **one** of the following

Environmental Statements

Environmental Statement	Mean Score
I try to recycle what I can - Finally we have some questions about yourself and your attitudes.	8.3
I am concerned about the environment - Finally we have some questions about yourself and your attitudes	7.3
I try to use less energy at home or work - Finally we have some questions about yourself and your attitudes	7.3
I now drive a smaller car or am considering switching to one because of the lower environmental impact - Finally we have some questions about yourself and your attitudes	6.2
I go out of my way to look after our environment - Finally we have some questions about yourself and your attitudes	5.9
I compost my food scraps and garden waste at home - Finally we have some questions about yourself and your attitudes	5.8
I am using energy more efficiently, for example solar water heating, insulation, etc. - Finally we have some questions about yourself and your attitudes	5.7
I use public transport whenever I can - Finally we have some questions about yourself and your attitudes	4.4
I think that there is nothing I can do that will make much difference - Finally we have some questions about yourself and your attitudes	3.9

- Each respondents responses to these statements were summed and the respondents were then split into 3 groups:
 - Environmentally Conscious
 - Neutral
 - Not environmentally conscious

3. Executive Summary

Executive Summary

- Climate Change Awareness and Human/Animal Impact
 - A third of the country strongly believe* that climate change is happening
 - 38% of the country strongly believe* that humans or animals have a direct impact on climate change
- ETS Awareness and Support (not-informed)
 - Less than half of the general public are aware of the ETS
 - Less than a quarter of the general public are aware of the ETS and know something about it
 - A third of respondents are aware of the ETS and felt that they had enough knowledge to be able to rate their level of support
 - 13% strongly support* the current planned ETS
- ETS Support (informed)
 - When all respondents were given a summary explanation of the ETS including 6 benefits and 6 costs, 77% felt knowledgeable enough to be able to rate their support and of these 8% strongly support* the ETS
- The general public's ETS concerns:
 - Resultant price rises for the public
 - Impact on the economy and NZ businesses
 - Job losses
 - The speed with which policy-makers plan to implement the scheme

Executive Summary

■ What the general public think should happen with the ETS

- 7% of the general public believe that policy-makers should launch the ETS in its current state (86% expressed an opinion)
- Nearly a quarter (23%) believe that the start should be delayed until more work has been done to assess the impacts
- Nearly a quarter (24%) think that New Zealand should simply encourage people to be more environmentally friendly and do nothing more for now
- Nearly a fifth (19%) would like to see changes made to reduce the negative impact before it is launched

■ Key issues facing the country according to the general public

- Reducing the cost of living, improving healthcare, reducing crime and improving the economy (tackling climate change ranked significantly lower than any other issue in the survey)
- The largest gaps where policy-makers are not thought to be paying enough attention are reducing the cost of living, reducing crime, reducing poverty and improving the health service

4. Climate Change Beliefs

A third of the country strongly believe* that climate change is happening

- When compared to the NZ general public (33%), the following segments have a **significantly higher** proportion that strongly believe that climate change is happening:
 - Maori (48%) and Asian Peoples (49%)
 - 15-29 age group (42%)
 - Labour (39%), Green (65%) and Maori Party (53%) supporters
 - Those that are environmentally conscious
- When compared to the NZ general public (33%), the following segments have a **significantly lower** proportion that strongly believe that climate change is happening:
 - New Zealand Europeans (27%)
 - Over 64's (21%)
 - National Party supporters (27%)
 - Those that are not environmentally conscious

*Q: Some say the earth's temperature is changing and this could have drastic effects in the long run.
Do you believe climate change is happening?
(Please rate on a scale from 1 to 10, where 1 means 'Don't believe at all' and 10 means 'Completely believe')
•- strongly support is defined as a rating of 9 or 10 on a scale from 1 to 10
Please see the Appendix for the full scale chart*

38% of the country strongly believe* that humans or animals have a direct impact on climate change

- When compared to the NZ general public (38%), the following segments have a **significantly higher** proportion that strongly believe that humans or animals have a direct impact on climate change:
 - Maori (51%) and Asian Peoples (53%)
 - 15-29 age group (47%)
 - Labour (44%), Green (68%) and Maori Party (60%) supporters
 - Those that are environmentally conscious
- When compared to the NZ general public (38%), the following segments have a **significantly lower** proportion that strongly believe that humans or animals have a direct impact on climate change:
 - New Zealand Europeans (32%)
 - 50-64 year olds (32%) and Over 64's (24%)
 - Males (33%)
 - National Party supporters (30%)

Q: Do you believe that people or animals can have a direct impact on climate change?

For example vehicle exhausts, factories that produce smoke, the cutting down of forests to replace with farms for animals.

(Please rate on a scale from 1 to 10, where 1 means 'Don't believe at all' and 10 means 'Completely believe')

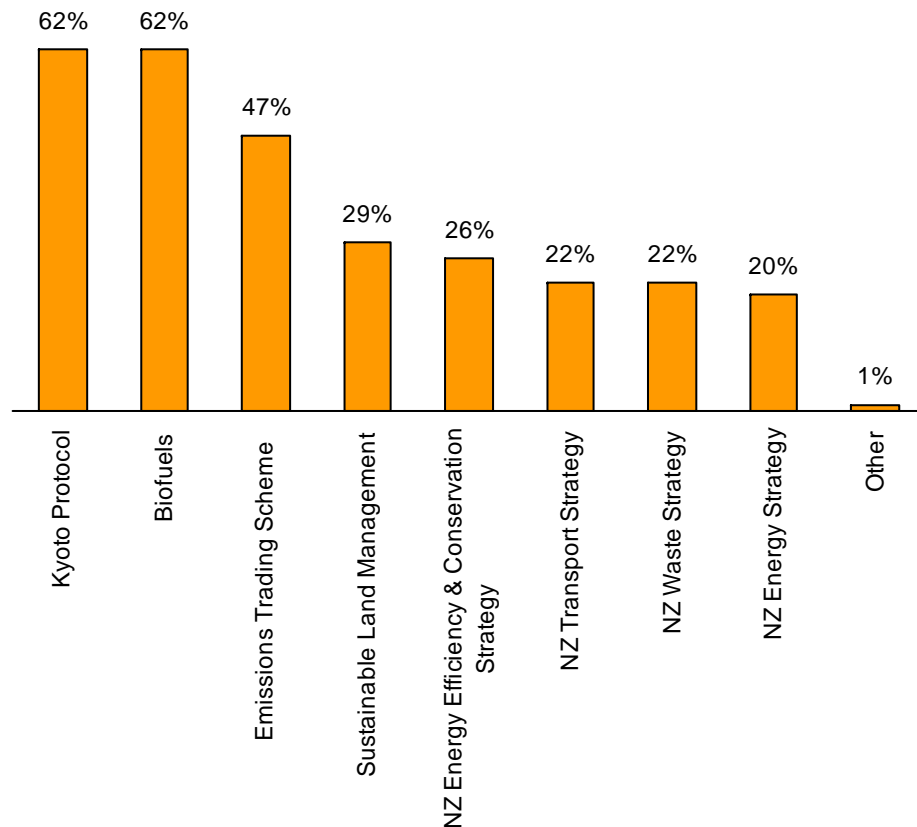
**- strongly support is defined as a rating of 9 or 10 on a scale from 1 to 10*

Please see the Appendix for the full scale chart

5. Awareness of Climate Change Initiatives

Less than half of the population are aware of the Emissions Trading Scheme

Are you aware of the following initiatives in the area of climate change?



- General awareness of New Zealand climate change initiatives is low
- Less than half of New Zealand are aware of the ETS
- Nearly two thirds are aware of the Kyoto Protocol and Biofuels
- Less than a third of the general public are aware of any of the other initiatives
- The following segments are **significantly more** aware of ETS:
 - New Zealand Europeans (52%)
 - 50-64 year olds (58%) and the Over 64's (61%)
 - Males (53%)
 - National (58%) and Green (66%) Party supporters
 - Those that are environmentally conscious
- The following segments are **significantly less** aware of ETS:
 - Maori (37%) and Asian Peoples (32%)
 - 15-29 year olds (35%)
 - Females (41%)
 - Those that are not environmentally conscious

6. Kyoto Protocol Support

29% of the country strongly support* New Zealand being part of the Kyoto Protocol

- When compared to the NZ general public (29%), the following segments have a **significantly higher** proportion that strongly support New Zealand being part of the Kyoto Protocol:
 - Pacific Peoples (43%), Asian Peoples (46%) and Other ethnicities (38%)
 - 15-29 age group (39%)
 - Females (32%)
 - Under \$20,000 income households (38%)
 - Labour (35%) and Green Party (63%) supporters
 - Those that are environmentally conscious
- When compared to the NZ general public (29%), the following segments have a **significantly lower** proportion that strongly support New Zealand being part of the Kyoto Protocol:
 - New Zealand Europeans (23%)
 - 50-64 year olds (22%) and Over 64's (20%)
 - Males (25%)
 - National Party supporters (23%)
 - Those that are not environmentally conscious

Q: The Kyoto Protocol is an international agreement to reduce greenhouse gas emissions. A total of 55 countries are part of the Kyoto Protocol including New Zealand, Australia and most of Europe. However, three large greenhouse gas emitters, the United States, China and India are not part of it. To what extent do you support New Zealand being part of Kyoto?

Please rate on a scale from 1 to 10, where 1 is 'I do not support it at all' and 10 is 'I fully support it'.

**- strongly support is defined as a rating of 9 or 10 on a scale from 1 to 10*

Please see the Appendix for the full scale chart

70% of the general public felt that they had enough knowledge to rate their support for the buying of credits to meet our Kyoto Protocol agreements and of these 9% strongly support* it

- 700 (70%) respondents felt they had enough knowledge to be able to rate their level of support
- When compared to the NZ general public (9%), the following segments have a **significantly higher** proportion that strongly support the buying of credits to meet our Kyoto Protocol agreements:
 - Maori (17%), Pacific Peoples (26%) and Asian Peoples (17%)
 - Those that are environmentally conscious
- When compared to the NZ general public (9%), the following segments have a **significantly lower** proportion that strongly support the buying of credits to meet our Kyoto Protocol agreements:
 - New Zealand Europeans (6%)
 - Those that are not environmentally conscious

*Q: New Zealand can meet its Kyoto Protocol obligations by buying credits from worthwhile climate change projects overseas. This would lessen the incentive to reduce emissions in New Zealand through an Emissions Trading Scheme (ETS) but would be much less damaging to our economy. Do you support the buying of credits to meet our Kyoto obligations? Please rate on a scale from 1 to 10, where 1 is 'I do not support it at all' and 10 is 'I fully support it'.
 *- strongly support is defined as a rating of 9 or 10 on a scale from 1 to 10
 Please see the Appendix for the full scale chart*

7. ETS Support and Understanding

Of the 47% of the general public who are aware of the ETS, 70% felt that they were well enough informed to rate their support and of these 13% strongly support* the scheme

- A third of respondents were aware of the ETS and felt that they had enough knowledge to be able to rate their level of support
- When compared to the NZ general public (13%), the following segments have a **significantly higher** proportion that strongly support* the ETS:
 - \$50,000 - \$70,000 income households (24%)
 - Labour Party (22%) supporters
 - Those that are environmentally conscious
- When compared to the NZ general public, the following segments have a **significantly lower** proportion that strongly support the ETS:
 - New Zealand Europeans (9%)
 - Over 64's (5%)
 - \$30,000 - \$50,000 income households (5%)
 - National Party (5%) supporters
 - Those that are not environmentally conscious

Q: To what extent do you support the proposed Emissions Trading Scheme (ETS) in New Zealand? Please rate on a scale from 1 to 10, where 1 is 'I do not support it at all' and 10 is 'I fully support it'.

**- strongly support is defined as a rating of 9 or 10 on a scale from 1 to 10
Please see the Appendix for the full scale chart*

Of the 47% of the general public who are aware of the ETS, 53% do not know any details or do not understand it

Spontaneous Elements of ETS	%
Don't know any details / don't understand	53%
Carbon trading credit scheme / buy, sell, trade credits from low impact activity	22%
Charging for emissions released into the atmosphere	13%
Reduce carbon emissions by various means / not exceed certain levels	13%
Carbon trading scheme by countries / international market in emission rights	4%
Taxing activities so they wont be viable / high tax / high debt / complex scheme / bad for the economy	3%
Make money for government / revenue / another tax	3%
Using trees as a carbon sink / planting and growing trees / creating credits	2%
Pay for use rather than reduce use / buy credits while emissions keep belching out	2%
Reduce climate change effects / become more sustainable	1%
No effect on greenhouse gas emissions	1%
We trade our clean emissions with countries with dirty emissions	0%
Biofuels by 2012 / efficient vehicles	0%

- 53% of the general public that are aware of the ETS do not know any details or do not understand it, so 22% know some details of the scheme
- 22% commented that it was a carbon trading credits scheme
- 13% stated that it imposed a charge for the release of emissions into the atmosphere
- 13% said that it existed to reduce carbon emissions by various means
- The more knowledgeable segments are:
 - New Zealand Europeans, 50-64 year olds, males, over \$100,000 income households, Green Party supporters and South Islanders
- The less knowledgeable segments are:
 - Maori, Pacific Peoples, 15-29 year olds, females, NZ First supporters and North Islanders

The following summary of the current planned ETS was given to the respondents:

- *The current government plans to introduce the Emissions Trading Scheme (ETS). The idea is to encourage businesses, farmers and others to reduce the emissions that their operation produces by charging them money for the gas produced.*
 - **The key benefits of the scheme to New Zealand are believed to be:**
 - *It will encourage a reduction of greenhouse gas emissions in New Zealand*
 - *New Zealand will be among the first to put in place a scheme as wide-ranging as this, so will be thought of as a leader in responding to climate change activity*
 - *This scheme will enhance New Zealand's 'clean and green' image and therefore help us to sell our goods overseas*
 - *This scheme will enhance New Zealand's 'clean and green' image and therefore help us to attract more tourists to New Zealand*
 - *People will become more climate-friendly. For example they will buy more climate-friendly products because they will be cheaper or more people will take the bus instead of the car*
 - *The scheme may create new opportunities for business in New Zealand*
 - **The key costs of the scheme to New Zealand are believed to be:**
 - *Fuel prices will go up from 2011*
 - *Household electricity prices will increase from 2010*
 - *By 2025 it is predicted that the scheme will result in the loss of 20,000 jobs and an overall cost to the economy of nearly \$6 billion*
 - *Some companies have said that they will not be able to compete with countries where a similar scheme is not in place. Some have said that they may have to move overseas in order to compete with overseas companies*
 - *Industries like forestry, fishing and shipping have said that this scheme will seriously affect them*
 - *New Zealand is the only country in the world intending to include agriculture in an Emissions Trading Scheme (ETS) and agriculture accounts for nearly half of New Zealand's income from overseas as well as nearly half of New Zealand's emissions*
- *Given the above information, to what extent do you support the proposed Emissions Trading Scheme (ETS) in New Zealand? Please rate on a scale from 1 to 10, where 1 is 'I do not support it at all' and 10 is 'I fully support it'.*

When all respondents were given a summary explanation of the ETS including 6 benefits and 6 costs:

- 77% felt that they were informed enough to rate their support
- Of these 8% strongly support* it
- When compared to the NZ general public (8%), the following segments have a **significantly higher** proportion that strongly support the ETS:
 - Pacific Peoples (26%), Asian Peoples (16%) and Other ethnicities (16%)
 - Labour (17%) and Green Party (21%) supporters
 - Those that are environmentally conscious
- When compared to the NZ general public (8%), the following segments have a **significantly lower** proportion that strongly support the ETS:
 - New Zealand Europeans (5%)
 - National Party supporters (4%)
 - Those that are not environmentally conscious

8. What drives support for ETS?

The general public are primarily concerned with the net impact on them in terms of price rises and feel that policy-makers should explore the implications on the country more before launching the ETS

ETS Statement	Mean Score
I am concerned about the predicted price rises, job losses and damage to the economy if the Emissions Trading Scheme (ETS) goes ahead	8.2
I believe that fuel and electricity costs will increase as a result of the Emissions Trading Scheme (ETS)	8.3
I think that we should take some time out to fully explore the impact of the proposed Emissions Trading Scheme (ETS) on New Zealand and not rush into it	8.1
Some companies will not be able to compete with countries where a similar scheme is not in place and may have to move overseas	7.7
I believe that the scheme will result in job losses in New Zealand	7.5
This is just another way for the government to tax New Zealanders	7.1
New Zealand should introduce the scheme gradually to businesses to let them get used to the extra costs	6.7
We need an independent climate change organization that deals with initiatives like the Emissions Trading Scheme (ETS) as they arise, rather than just reviewing the law every five years	6.7
Businesses (including farmers) that pollute should carry the costs of the Emissions Trading Scheme (ETS) not tax-payers	6.5
It makes no sense to include agriculture in the scheme when other countries aren't	6.2
I think that we should wait and see what other countries do first (e.g. Australia)	5.9
This scheme will enhance New Zealand's 'clean and green' image and therefore help us to attract more tourists to New Zealand	5.7
People will become more climate-friendly. For example they will buy more climate-friendly products because they will be cheaper or more people will take the bus instead of the car	5.6
This scheme will enhance New Zealand's 'clean and green' image and therefore help us to sell our goods overseas	5.6
New Zealand should be leading the way in responding to climate change	5.6
It makes sense to include agriculture in the Emissions Trading Scheme (ETS) as agriculture accounts for nearly half of New Zealand's emissions	5.4
The Emissions Trading Scheme (ETS) in New Zealand will have a significant impact on reducing greenhouse gas emissions	5.0
The scheme will create new opportunities for business in New Zealand	4.8
I think we should do whatever we can to reduce greenhouse gas emissions in New Zealand, regardless of what it costs me personally	4.7
There are major benefits to the New Zealand economy in having an Emissions Trading Scheme (ETS)	4.7
The benefits associated with the Emissions Trading Scheme (ETS) in New Zealand outweigh the costs	4.5
The cost of the Emissions Trading Scheme (ETS) should be paid for by tax-payers so as to avoid damaging specific businesses	3.4

- The general public are concerned primarily about the following aspects of the ETS:
 - Resultant price rises for the public
 - Impact on the economy and NZ businesses
 - Job losses
 - The speed with which policy-makers plan to implement the scheme
- They also feel that tax-payers should not carry the cost of the ETS to avoid damaging businesses

Q: The following is a list of statements relating to the current planned Emissions Trading Scheme. Please rate on a scale from 1 to 10, where 1 is 'I completely disagree' and 10 is 'I completely agree'

Regression analysis enables us to identify the key drivers of and their respective impacts on support for the current proposed ETS

- In order to understand which of the statements about ETS drive its current support, regression analysis was carried out.
- The analysis was completed at the full sample level
- From this analysis we can derive impact weights i.e. how much of an impact each statement has on support for the current proposed ETS. This allows us to understand where efforts should be placed in order to ultimately improve the support of ETS.
 - During this process, statements that had no significant impact on the support for the current proposed ETS were removed from the analysis.
 - The statements in **black** indicate that a high score (high agreement) on this statement drive a **high** score (high support) for the current planned ETS
 - The statements in **red** indicate that a high score (high agreement) on this statement drive a **low** score (low support) for the current planned ETS
 - The sum of all the impacts weights equals 100%

Audience – General Public

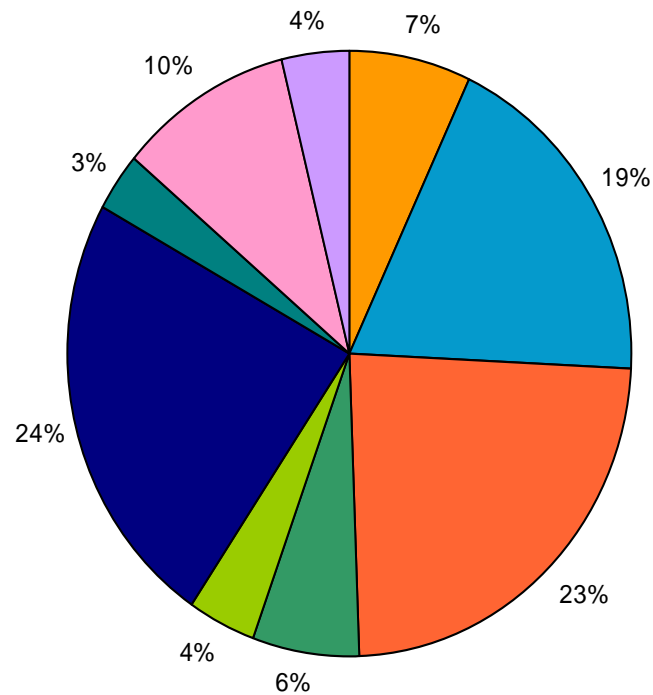
- The primary statements that have the largest impact on changes in ETS support for the general public are:
 - Those statements that focus on reducing greenhouse gas emissions (25% combined impact)
 - Concern about the predicted price rises, job losses and damage to the economy (20% combined impact)

ETS Statement	Impact Weight
I think we should do whatever we can to reduce greenhouse gas emissions in New Zealand, regardless of what it costs me personally	14%
The Emissions Trading Scheme (ETS) in New Zealand will have a significant impact on reducing greenhouse gas emissions	11%
I am concerned about the predicted price rises, job losses and damage to the economy if the Emissions Trading Scheme (ETS) goes ahead	11%
There are major benefits to the New Zealand economy in having an Emissions Trading Scheme (ETS)	9%
I believe that the scheme will result in job losses in New Zealand	9%
It makes sense to include agriculture in the Emissions Trading Scheme (ETS) as agriculture accounts for nearly half of New Zealand's emissions	8%
New Zealand should be leading the way in responding to climate change	7%
The benefits associated with the Emissions Trading Scheme (ETS) in New Zealand outweigh the costs	7%
The cost of the Emissions Trading Scheme (ETS) should be paid for by tax-payers so as to avoid damaging specific businesses	5%
New Zealand should introduce the scheme gradually to businesses to let them get used to the extra costs	5%
It makes no sense to include agriculture in the scheme when other countries aren't	5%
I think that we should wait and see what other countries do first (e.g. Australia)	5%
Businesses (including farmers) that pollute should carry the costs of the Emissions Trading Scheme (ETS) not tax-payers	4%

Q: The following is a list of statements relating to the current planned Emissions Trading Scheme. Please rate on a scale from 1 to 10, where 1 is 'I completely disagree' and 10 is 'I completely agree'

9. What should policy-makers do regarding the ETS?

7% believe that the ETS should be launched in its current state



- Start the Emissions Trading Scheme (ETS) as currently planned (7%)
- Make further changes to the scheme to reduce negative impacts on NZ before it goes ahead (19%)
- Delay the start until more work has been carried out to fully understand the impacts (23%)
- Wait and see if other key emitting countries agree to emissions reduction targets (6%)
- Wait and see what Australia does as they are our biggest export market (4%)
- Continue to encourage people to do things that are better for the environment, but nothing more for now (24%)
- Do nothing at all for now (3%)
- Don't know (10%)
- Don't care (4%)

- 86% expressed an opinion on what should happen with the ETS (the others either don't know or don't care)
- Nearly a quarter (23%) of the population believe that the start should be delayed until more work has been done
- Nearly a quarter (24%) think that we should simply encourage people to more environmentally friendly and do nothing more for now
- Nearly a fifth (19%) would like to see changes made to reduce the negative impact of ETS
- A further 4% want to wait to see what Australia does
- Other ethnicities (13%), Green Party (22%) and Maori Party (16%) supporters are more supportive of launching the scheme as it is
- New Zealand Europeans (5%), over \$100,000 income households (2) and National Party supporters (4%) are less supportive of starting the scheme as it is

10. Current Voting Intentions and Policy-Makers' Focus

All issues presented to the general public were seen as more important than tackling climate change

What issues should policy-makers focus on?	Mean Score
Reducing the cost of living	8.1
Improving the health service	8.0
Reducing the level of crime	7.9
Improving the economy	7.8
Improving the quality of education	7.6
Reducing the level of poverty	7.4
Supporting children and families	7.3
Supporting pensioners	7.2
Cutting taxes	7.1
Tackling climate change issues	5.8

- The key issues are ‘Reducing the Cost of Living’, ‘Improving Healthcare’ and ‘Reducing Crime’
- All issues except ‘Tackling Climate Change’ were ranked in excess of 7 out of 10
- ‘Tackling Climate Change’ mean score is statistically significantly lower than the mean scores of all other issues. This suggests that all other issues are significantly more important to the general public
- The Over 64’s see ‘Health and Supporting Pensioners’ as more important than the other age groups
- Females generally allocate a higher score to most of the issues
- Over \$100,000 income households want a lower emphasis on ‘Tackling Climate Change’, ‘Supporting Pensioners’, ‘Children and Families’ and ‘Reducing Poverty’

However the general public feel that most of the policy-makers' effort is going into 'Tackling Climate Change' and 'Supporting Children and Families'

What issues are policy-makers focusing on?	Mean Score
Tackling climate change issues	6.1
Supporting children and families	6.0
Improving the health service	5.3
Improving the economy	5.3
Cutting taxes	5.3
Improving the quality of education	5.2
Supporting pensioners	4.9
Reducing the level of crime	4.7
Reducing the level of poverty	4.6
Reducing the cost of living	4.2

- There are 3 clear tiers of perceived current focus from policy-makers:
 - Primary focus – 'Tackling Climate Change' and 'Supporting Children and Families'
 - Secondary focus – 'Taxes', 'Economy', 'Health Service' and 'Education'
 - Tertiary focus – 'Pensioners', 'Crime', 'Poverty' and 'Cost of Living'
- The Over 64's feel that the policy-makers are placing more emphasis on 'Tackling Climate Change' compared with younger age groups
- Labour supporters believe that the policy-makers are focusing more on all issues compared with other party supporters, with the exception of 'Tackling Climate Change'

Q: From your understanding, where is the government currently focusing its efforts?
 Please rate each of the following issues on a scale from 1 to 10,
 where 1 means 'focus the least attention' and 10 means 'focus the most attention'

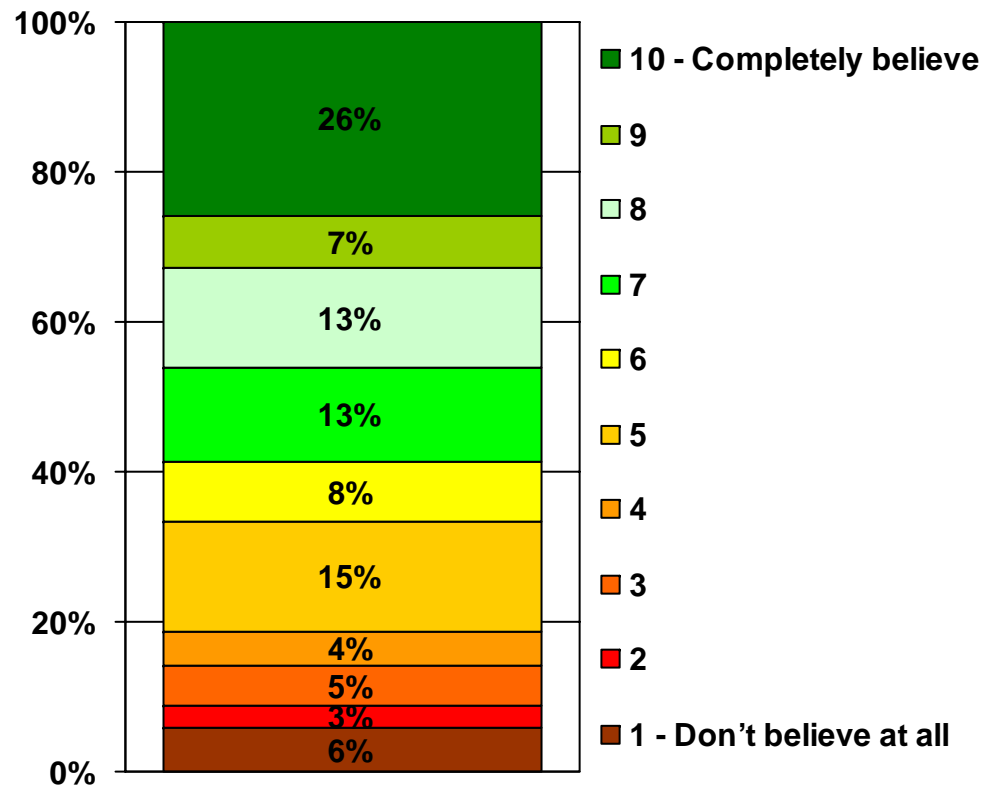
The only area where the general public believe policy-makers are focusing too much attention is 'Tackling Climate Change Issues'

Issues focus (required versus perceived)	Mean Gap
Reducing the cost of living	-3.9
Reducing the level of crime	-3.2
Reducing the level of poverty	-2.8
Improving the health service	-2.8
Improving the economy	-2.5
Improving the quality of education	-2.4
Supporting pensioners	-2.3
Cutting taxes	-1.8
Supporting children and families	-1.2
Tackling climate change issues	0.3

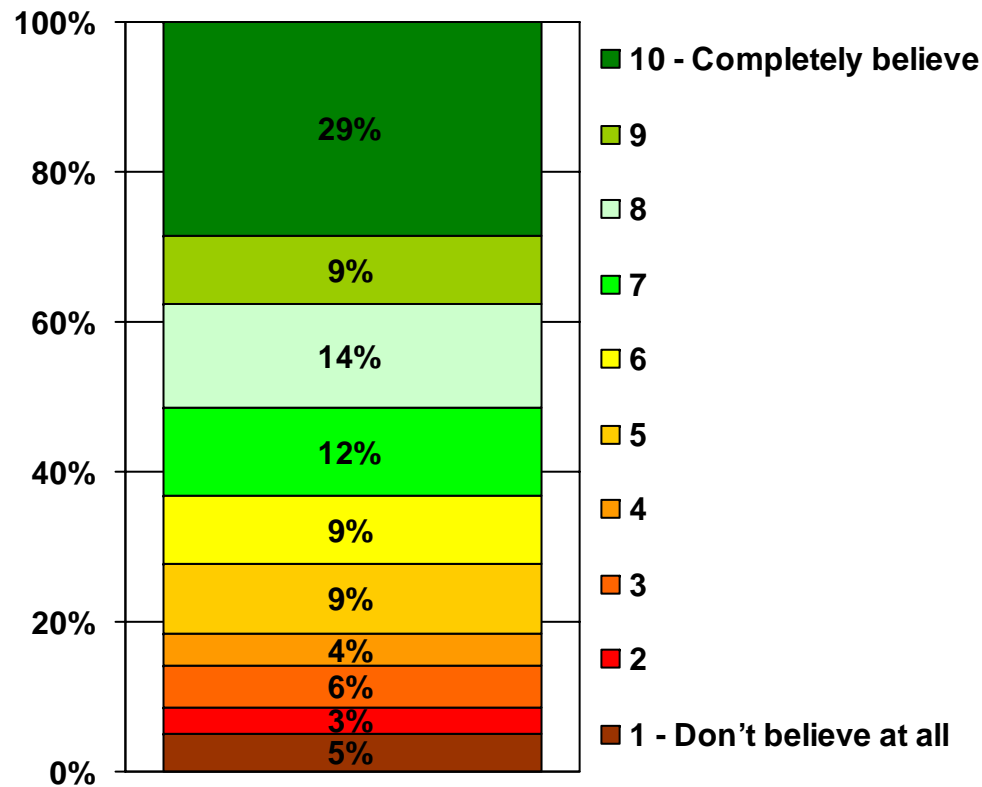
- Again there are 3 clear tiers in the gap between where policy-makers should be versus where they are perceived to be focusing its efforts:
 - Very Large gap – 'Cost of Living' and 'Crime'
 - Large gap – 'Poverty', 'Health Service'
 - Moderate gap – 'Economy', 'Education' and 'Pensioners'
 - Small gap – 'Cutting Taxes', 'Children and Families'
- 'Tackling Climate Change' is the only issue that the public believe is receiving too much attention
- The focus gap is less severe for the 15-29 age group for most issues
- Only the Green and Maori Party supporters believe that policy-makers are not focusing enough attention on 'Tackling Climate Change Issues'

11. Appendix

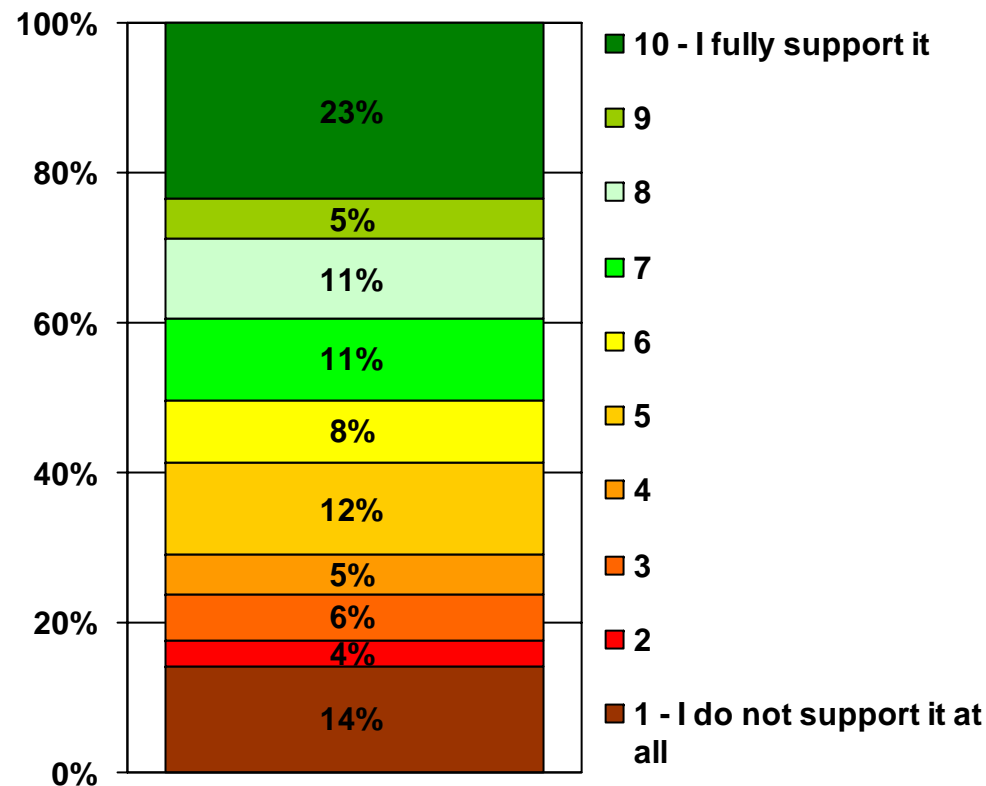
Q: Some say the earth's temperature is changing and this could have drastic effects in the long run. Do you believe climate change is happening? (Please rate on a scale from 1 to 10, where 1 means 'Don't believe at all' and 10 means 'Completely believe')



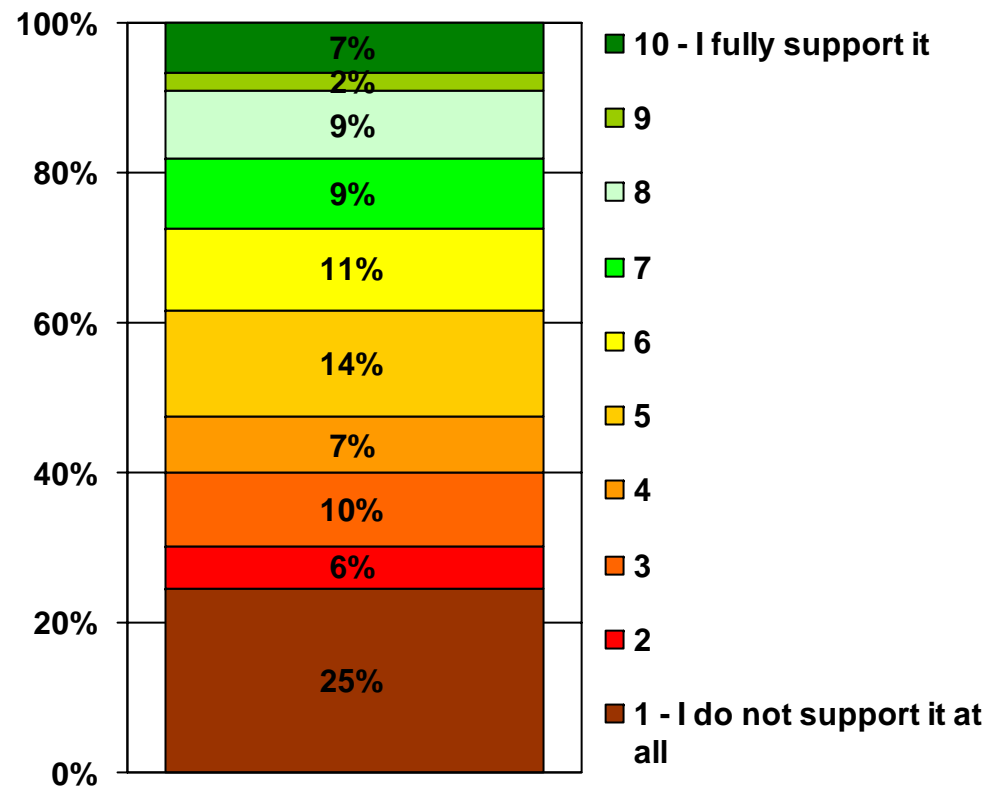
Q: Do you believe that people or animals can have a direct impact on climate change?
 For example vehicle exhausts, factories that produce smoke, the cutting down of forests to replace with farms for animals. Please rate on a scale from 1 to 10, where 1 means 'Don't believe at all' and 10 means 'Completely believe'



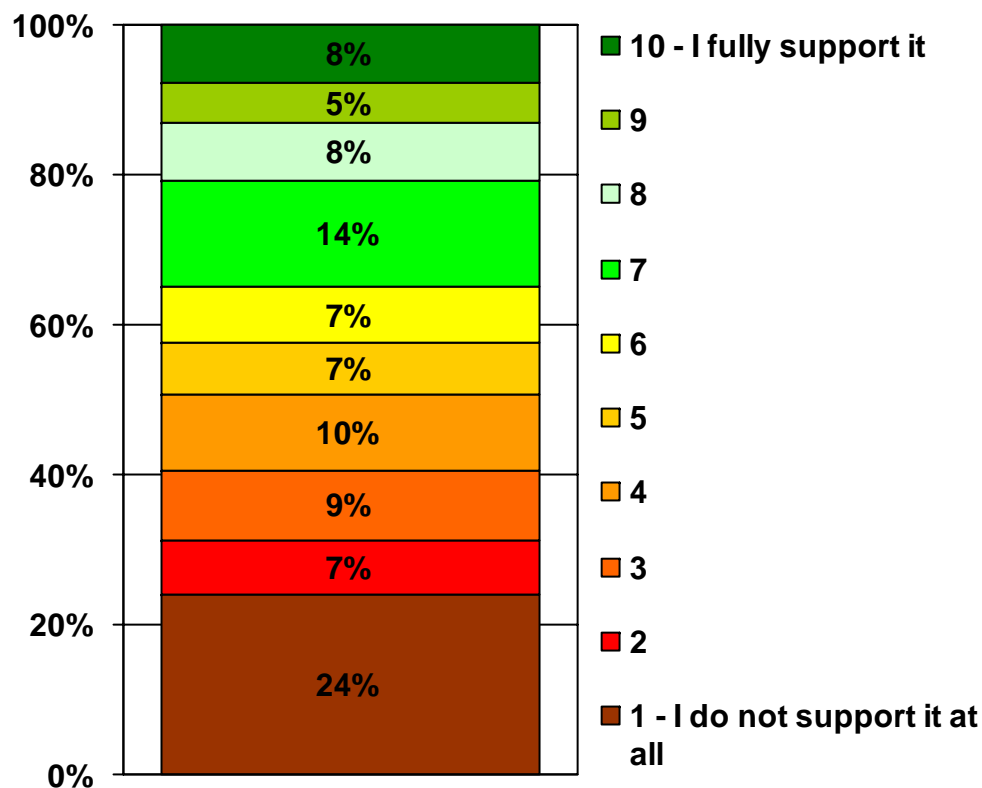
Q: The Kyoto Protocol is an international agreement to reduce greenhouse gas emissions. A total of 55 countries are part of the Kyoto Protocol including New Zealand, Australia and most of Europe. However, three large greenhouse gas emitters, the United States, China and India are not part of it. To what extent do you support New Zealand being part of Kyoto? Please rate on a scale from 1 to 10, where 1 is 'I do not support it at all' and 10 is 'I fully support it'.



Q: New Zealand can meet its Kyoto Protocol obligations by buying credits from worthwhile climate change projects overseas. This would lessen the incentive to reduce emissions in New Zealand through an Emissions Trading Scheme (ETS) but would be much less damaging to our economy. Do you support the buying of credits to meet our Kyoto obligations? Please rate on a scale from 1 to 10, where 1 is 'I do not support it at all' and 10 is 'I fully support it'.



Q: To what extent do you support the proposed Emissions Trading Scheme (ETS) in New Zealand? Please rate on a scale from 1 to 10, where 1 is 'I do not support it at all' and 10 is 'I fully support it'.



The following summary of the current planned ETS was given to the respondents:

- *The current government plans to introduce the Emissions Trading Scheme (ETS). The idea is to encourage businesses, farmers and others to reduce the emissions that their operation produces by charging them money for the gas produced.*
 - **The key benefits of the scheme to New Zealand are believed to be:**
 - *It will encourage a reduction of greenhouse gas emissions in New Zealand*
 - *New Zealand will be among the first to put in place a scheme as wide-ranging as this, so will be thought of as a leader in responding to climate change activity*
 - *This scheme will enhance New Zealand's 'clean and green' image and therefore help us to sell our goods overseas*
 - *This scheme will enhance New Zealand's 'clean and green' image and therefore help us to attract more tourists to New Zealand*
 - *People will become more climate-friendly. For example they will buy more climate-friendly products because they will be cheaper or more people will take the bus instead of the car*
 - *The scheme may create new opportunities for business in New Zealand*
 - **The key costs of the scheme to New Zealand are believed to be:**
 - *Fuel prices will go up from 2011*
 - *Household electricity prices will increase from 2010*
 - *By 2025 it is predicted that the scheme will result in the loss of 20,000 jobs and an overall cost to the economy of nearly \$6 billion*
 - *Some companies have said that they will not be able to compete with countries where a similar scheme is not in place. Some have said that they may have to move overseas in order to compete with overseas companies*
 - *Industries like forestry, fishing and shipping have said that this scheme will seriously affect them*
 - *New Zealand is the only country in the world intending to include agriculture in an Emissions Trading Scheme (ETS) and agriculture accounts for nearly half of New Zealand's income from overseas as well as nearly half of New Zealand's emissions*
- *Given the above information, to what extent do you support the proposed Emissions Trading Scheme (ETS) in New Zealand? Please rate on a scale from 1 to 10, where 1 is 'I do not support it at all' and 10 is 'I fully support it'.*

Q: Given the above information, to what extent do you support the proposed Emissions Trading Scheme (ETS) in New Zealand? Please rate on a scale from 1 to 10, where 1 is 'I do not support it at all' and 10 is 'I fully support it'.

