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Segmentation and insights programme: Consumers and energy safety

Revised report: September 2019

WORKSAFE
NEW ZEALAND | MAHI HAUMARU AOTEAROA

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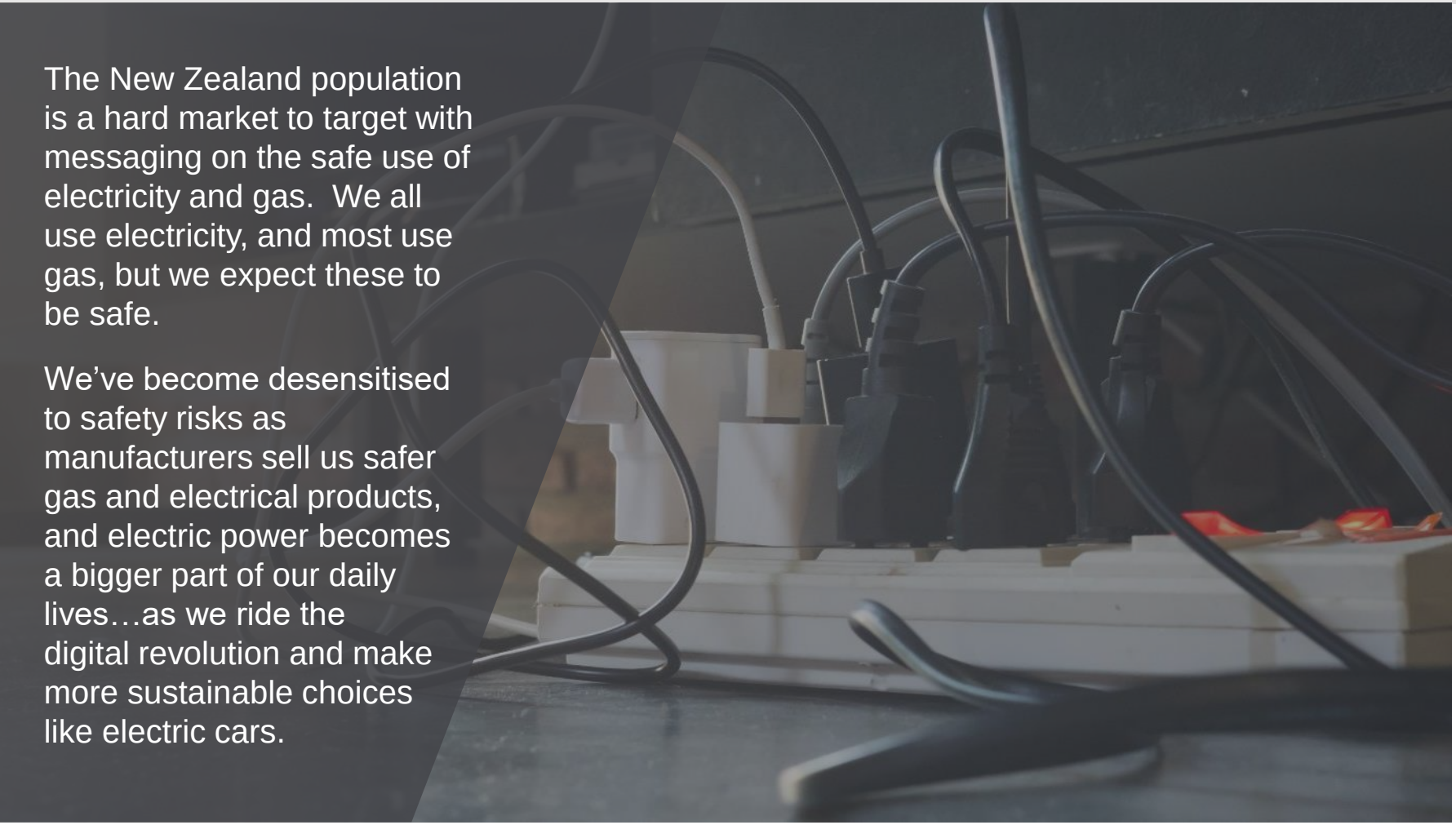
The challenge

The New Zealand population is a hard market to target with messaging on the safe use of electricity and gas. We all use electricity, and most use gas, but we expect these to be safe.

We've become desensitised to safety risks as manufacturers sell us safer gas and electrical products, and electric power becomes a bigger part of our daily lives…as we ride the digital revolution and make more sustainable choices like electric cars.

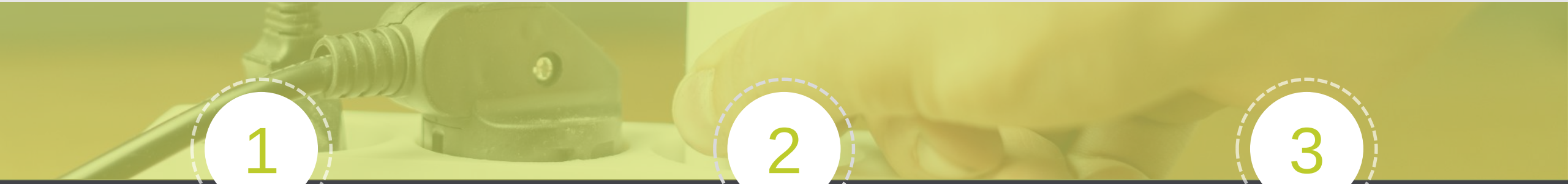


WorkSafe has had some success with its *Energy Safety* campaign (featuring Claude the Cat)[1], with self-reported behaviour change.

Now there's a need to step back and assess how to best segment and target consumers, and assess what communications and initiatives are needed to address gaps in what WorkSafe has been doing. While future initiatives may be tied to specific electricity and gas topics, WorkSafe also recognise a need to shift the conversation with consumers to think about risk in a more generic sense.

1 The creative features Claude the Safety Cat, a character who spans both home and work domains, and plays on the proverb of "cats having nine lives". The 2018/19 summer campaign focussed on the use of gas and electricity in tents, caravans and DIY contexts.

There are three key questions to answer



1 WHAT ARE THE PROBLEMS? AND HOW BIG ARE THEY?

- What gas and electrical incidents do NZ households experience?
- What risky behaviours do consumers engage in?
- What are consumers currently doing to prevent harm?
- Do consumers think specific behaviours are unsafe? Is there a knowledge problem?

2 HOW COMMITTED ARE CONSUMERS TO SAFE BEHAVIOUR?

- What population segments exist?
- Who engages in risky behaviours?
- How committed are consumers to acting safely?

3 WHAT DRIVES BEHAVIOUR AND HOW CAN WE CHANGE IT?

- What System 1 and System 2 drivers support and deter safe behaviours?
- What influencers will be the most effective in driving greater commitment and changing behaviours?

What we did

METHOD

- 20 qualitative interviews with consumers.
- Survey of 1,107 consumers aged 18 years and over – this consisted of a national online survey of 1,007 consumers, and 100 face-to-face interviews in high deprivation areas (Otara, Flaxmere/Hastings, Ngaruawahia, and Aranui).

INTERVIEW DATES

Interviewing for the survey was conducted from 30 May to 22 June, 2019 (prior to the Christchurch gas explosion on 19 July 2019).

WEIGHTING AND RELIABILITY

The maximum margins of error associated with the sample of 1,107 electricity users is +/-2.9% and with the sample of 789 gas users is +/-3.5%.

Survey data were weighted by age within gender, ethnicity, region, and household income by household size so that the population of consumers reflects Statistics New Zealand Census characteristics.

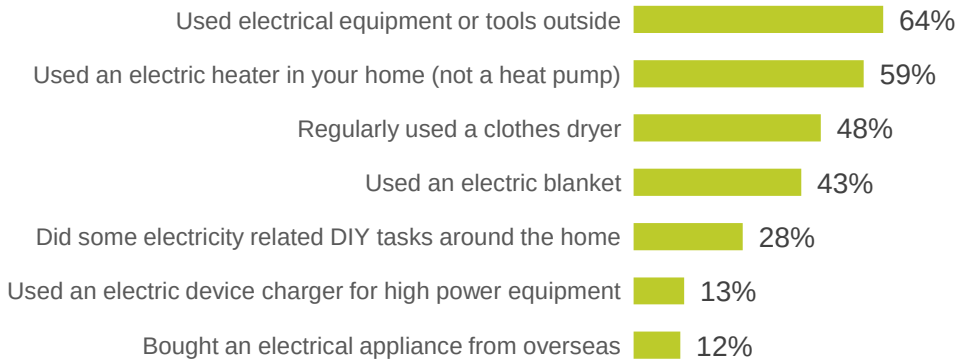
QUESTIONNAIRE DESIGN

The average interview length was 16 minutes (rising to 22 minutes for gas users in the face-to-face survey).

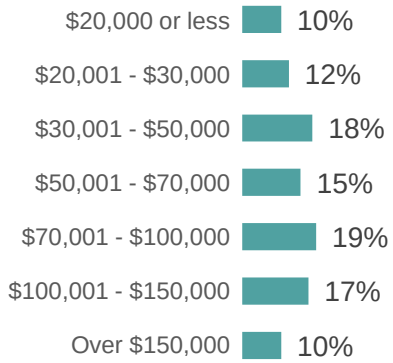
Qualitative findings informed the design of the quantitative questionnaire. The questionnaire was also cognitively tested with six consumers and piloted with 22 consumers prior to the main fieldwork.

Who we surveyed – Electricity consumers

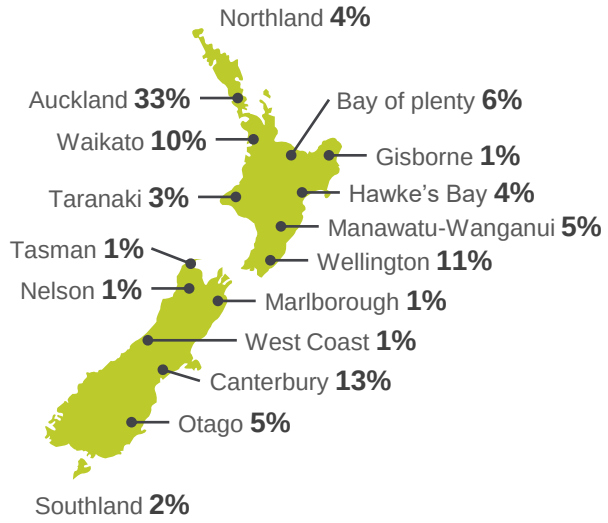
USE OF ELECTRICITY IN LAST 12 MONTHS



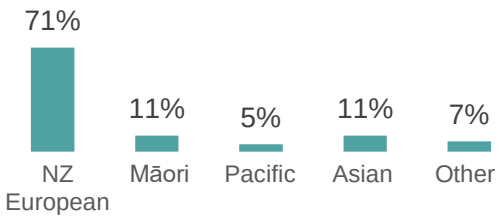
HOUSEHOLD INCOME



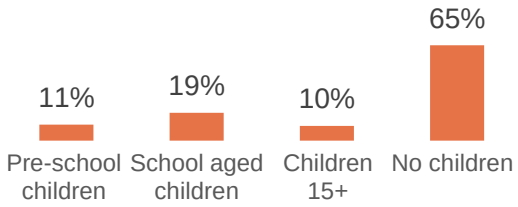
LOCATION



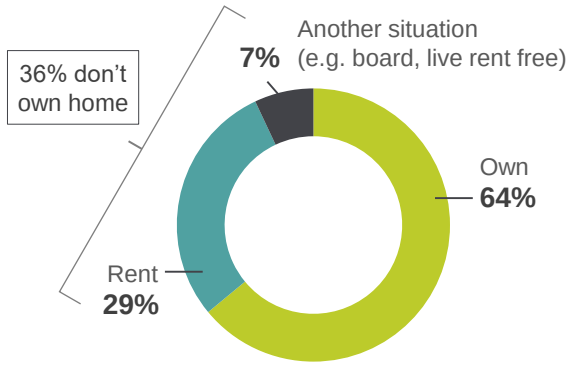
ETHNICITY



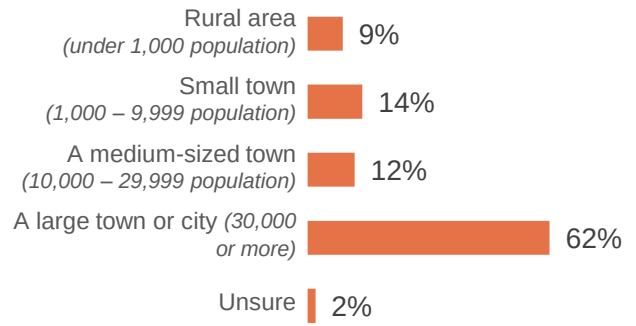
CHILDREN IN HOUSEHOLD



HOME TENURE

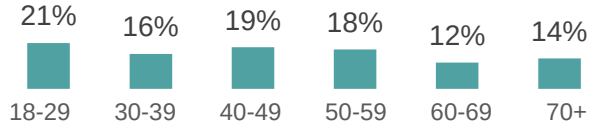


POPULATION DENSITY



GENDER

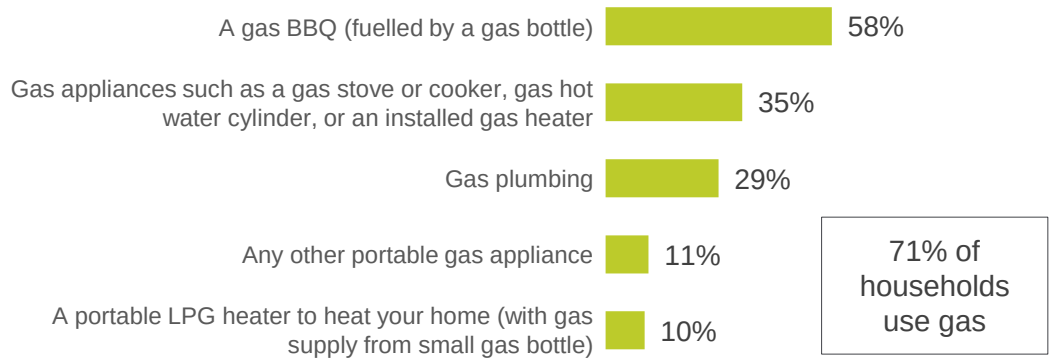
AGE



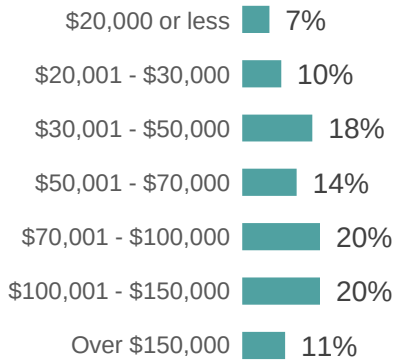
Base: All consumers (1,107)
Source: S1, S2, S3, S4, S5, S7, Q1a, Q24, Q25

Who we surveyed – Gas consumers

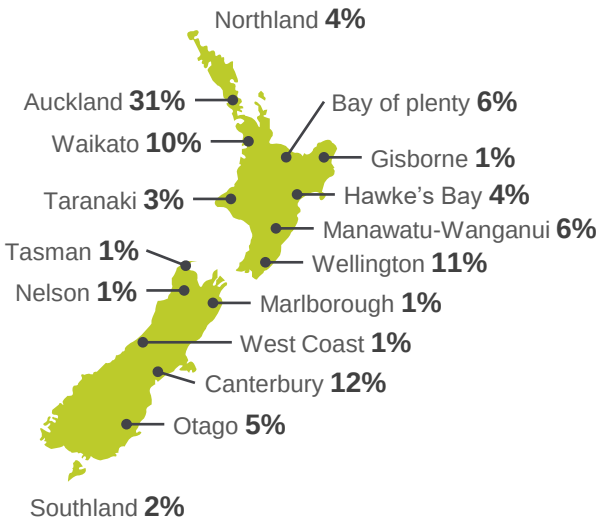
USE OF GAS IN LAST 12 MONTHS (based on all NZ households)



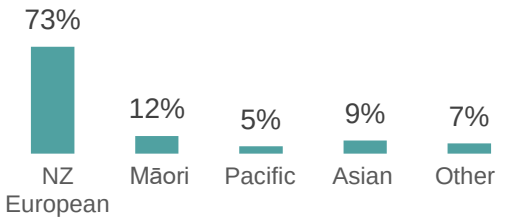
HOUSEHOLD INCOME



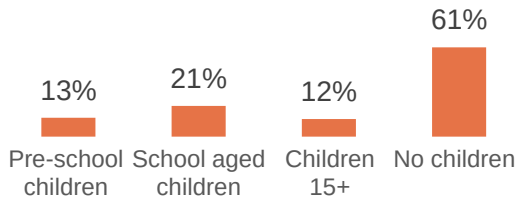
LOCATION



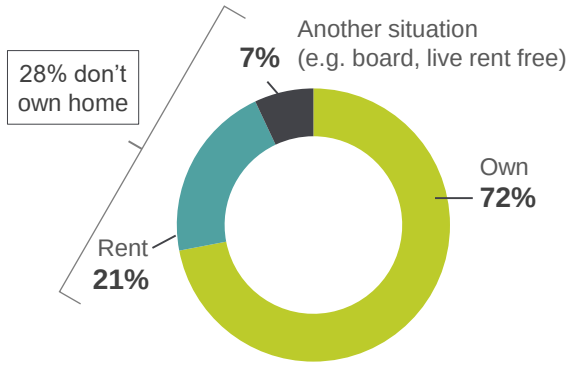
ETHNICITY



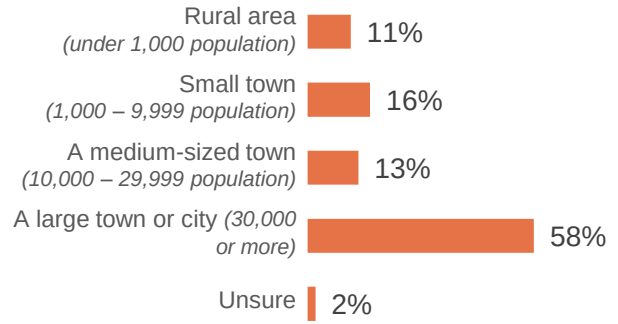
CHILDREN IN HOUSEHOLD



HOME TENURE

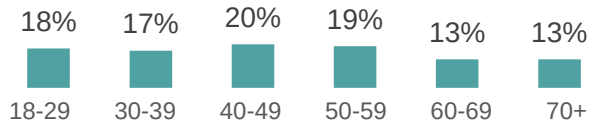


POPULATION DENSITY



GENDER

AGE



Base: Results on this page are based on gas consumers (789). The exception to this is the survey results on types of use of gas, which are based on all respondents (1,107).
Source: S1, S2, S3, S4, S5, S7, Q12, Q24, Q25

GAS: Summary of insights and conclusions

- Gas related incidents occur in one in 25 households, and are often not well understood by homeowners. They stem from both extrinsic problems of people's actions around gas appliances (i.e. mistakes in using them) and also from intrinsic issues of how well their gas is set up and/or maintained.
- There is quite a high degree of tolerance for reoccurring issues and a low rate of action to prevent gas incidents.
- For a substance that is potentially harmful, this level of ambivalence is of concern.
- Some consumer segments are much more safety conscious in their gas behaviours (although regular checking of LPG appliances could be improved across the board). However, a full half of NZ gas users are not committed to a gas safe approach. There is broad scope to change attitudes, behaviours – and ensuing outcomes – when it comes to gas safety.
- Those with a gas safe lifestyle are more likely to be older and homeowners than the general population. They find personal satisfaction from being safe with gas.
- In contrast, for the uncommitted groups gas safety doesn't take up a lot of time or thought – and is often deemed someone else's responsibly (i.e. the landlord's). The consumer's perceived threat from gas is currently not strong or salient enough to overcome the effort and costs of addressing their own behaviour. People they know often also do not demonstrate gas safe behaviour and hence opportunities to learn are limited.
- In order to change their behaviour, we need to re-address the perceived threat level of gas. Furthermore, gas safety needs to have a physical presence in the home and social norms around gas safety need to be addressed using audience-appropriate influencers such as landlords, parents and community groups. Note, landlords only have responsibility for fixed/permanently plumbed gas appliances – not portable or LPG-gas appliances.

ELECTRICITY: Summary of insights and conclusions

- Electrical incidents are quite common in New Zealand households, and encompass a wide variety of sources.
- Electrical appliances are a key source of incidents – through both misuse and faults. Wirings and fittings (separately to appliances) also cause problems, particularly in households of limited means. Electric shocks are often tolerated. Extension cords and multiplugs seem to be habitually used, and are quite often a source of incidents.
- The general attitude to electrical safety is one of reactivity – offending appliances are dumped (or fixed) after the event and/or work arounds are put in place. Systematic and proactive electrical safety is in the minority. Many unsafe behaviours are carried out by homeowners, often whilst knowing that there is a degree of risk involved with them.
- Those with the least amount of incidents and safest attitudes are more likely to be older and homeowners than the general population.
- Similar to gas, those uncommitted to electrical safety (just over half the population surveyed) often prioritise convenience and low effort over taking action. Cost is a barrier, as is the rental environment which complicates feelings of ownership (and may contribute to unsafe behaviours among renters who don't necessarily view maintenance issues as their problem).
- Most markedly when it comes to electricity, is the frequent approach to using 'work arounds' as a way of solving issues. Everyday actions sometimes betray a casualness towards potential consequences that put New Zealand households in the way of harm.
- Similarly to gas, in order to change behaviour, a greater sense of the threat of unsafe electrical behaviours needs to be promoted and target households need to understand that electricity is not the place for 'number eight wire' mentality. Again, there is an opportunity to use influencers for target groups to role model safe behaviours.

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What are the problems and how big are they?

In this section, we first explore consumer incidents and risky behaviours with gas, and then address those with electricity and electrical appliances.

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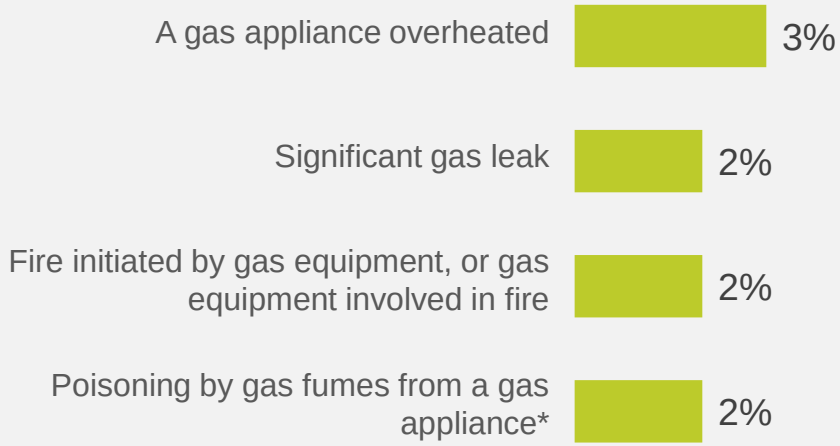
GAS: One in every 25 households that use gas have experienced an incident in the last 12 months. Incidents are split between overheated appliances, leaks, fires and fumes.

HOUSEHOLD GAS RELATED INCIDENTS

These households experience an average of 2.1 incidents per year.

4% of households have experienced a gas related incident in the last 12 months



*Some respondents may equate smelling gas to poisoning. WorkSafe data on carbon monoxide poisoning associated with LPG and natural gas accidents indicates that incidents are rare. In the last 26 years, 27 notifiable LPG accidents, five non-notifiable LPG accidents, six notifiable natural gas accidents, and 14 non-notifiable natural gas accidents were reported. Notifiable accidents are defined as being above the threshold specified in the Gas Acts.

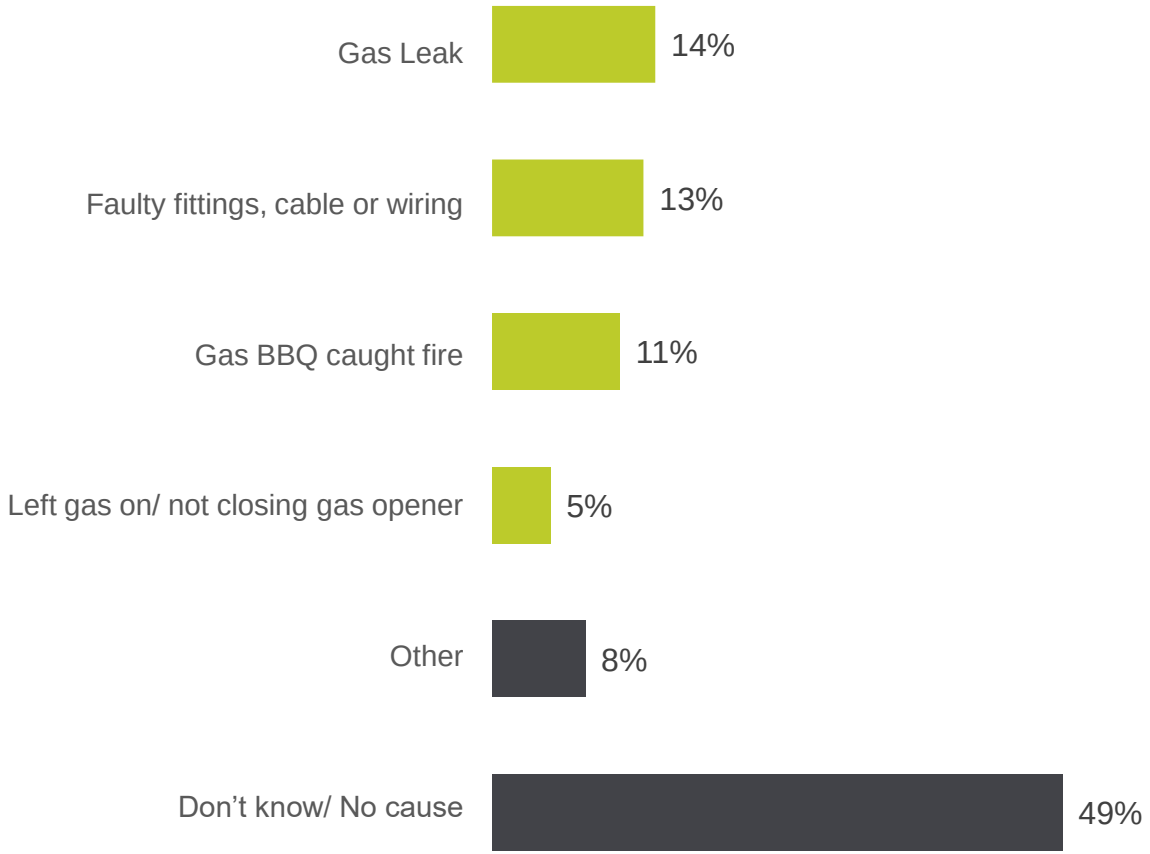
This is higher among:

- *Younger consumers (11% of 18-29 year olds)*
- *Renters (8%)*
- *Non-NZ European ethnic groups (7%)*

Base: All gas consumers (789)
Source: Q13a. *"Have any of the following gas-related incidents happened in your household in the last 12 months?"*

GAS: The incidents are not well understood: many are unsure of the cause. When the cause is known, gas leaks and faulty set ups are common, along with consumer actions with BBQs or leaving the gas on.

CAUSE OF GAS INCIDENT



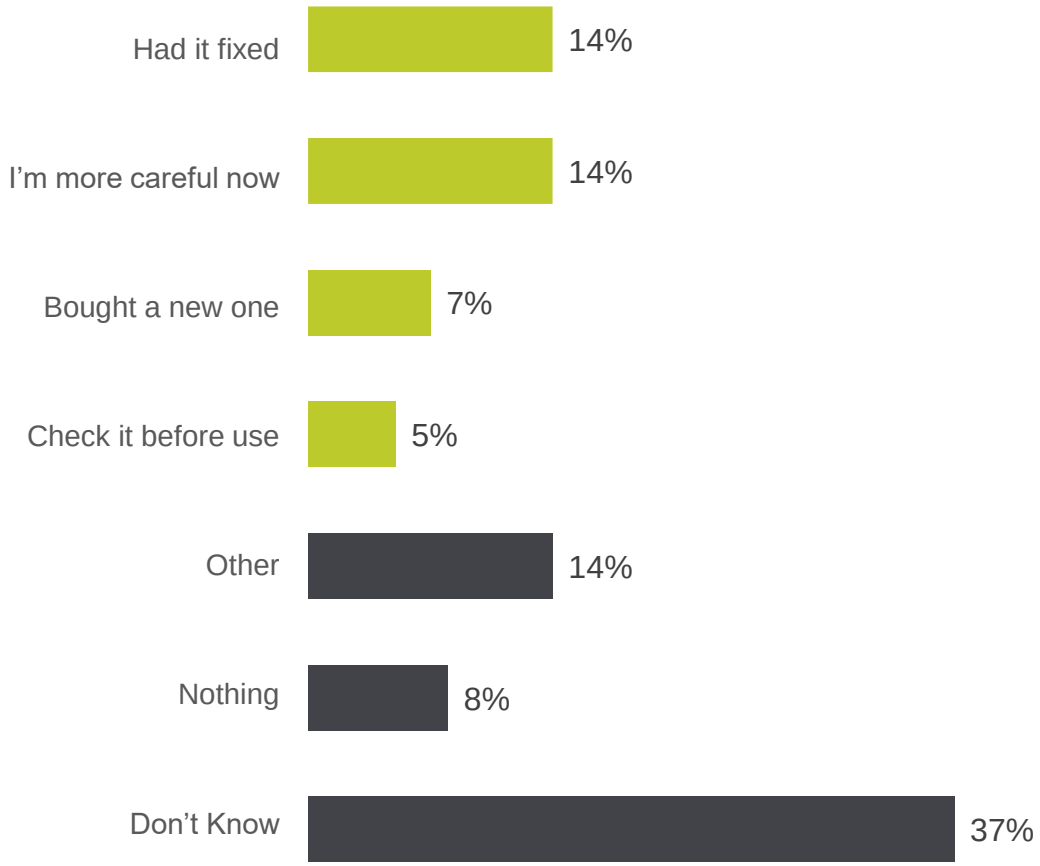
"We had a barbecue and the gas was turned up on high and flames rose up around the pipe of the gas bottle, until the gas bottle was switched off."

"The fitting was faulty for our gas heater. We could smell a gas leak, so my husband (who is a gas technician) replaced the faulty fitting."

Base: Experienced gas-related incident in last 12 months (34)
Source: Q13b. *"Thinking about the gas related incident(s) you had in the last 12 months, what was the cause(s)?"*

GAS: About one-third of those who experienced a gas-related incident are unsure of whether any action has been taken to prevent the incident happening again. For those who have taken action, replacing or repairing the faulty product is common while some consumers express an attitudinal shift in 'taking more care'.

ACTION TAKEN TO PREVENT RECURRENCE OF GAS INCIDENTS



"Had [a frayed gas hose] replaced by a professional and ensured they kept one in stock should it happen again."

"We check fittings before using our heater."

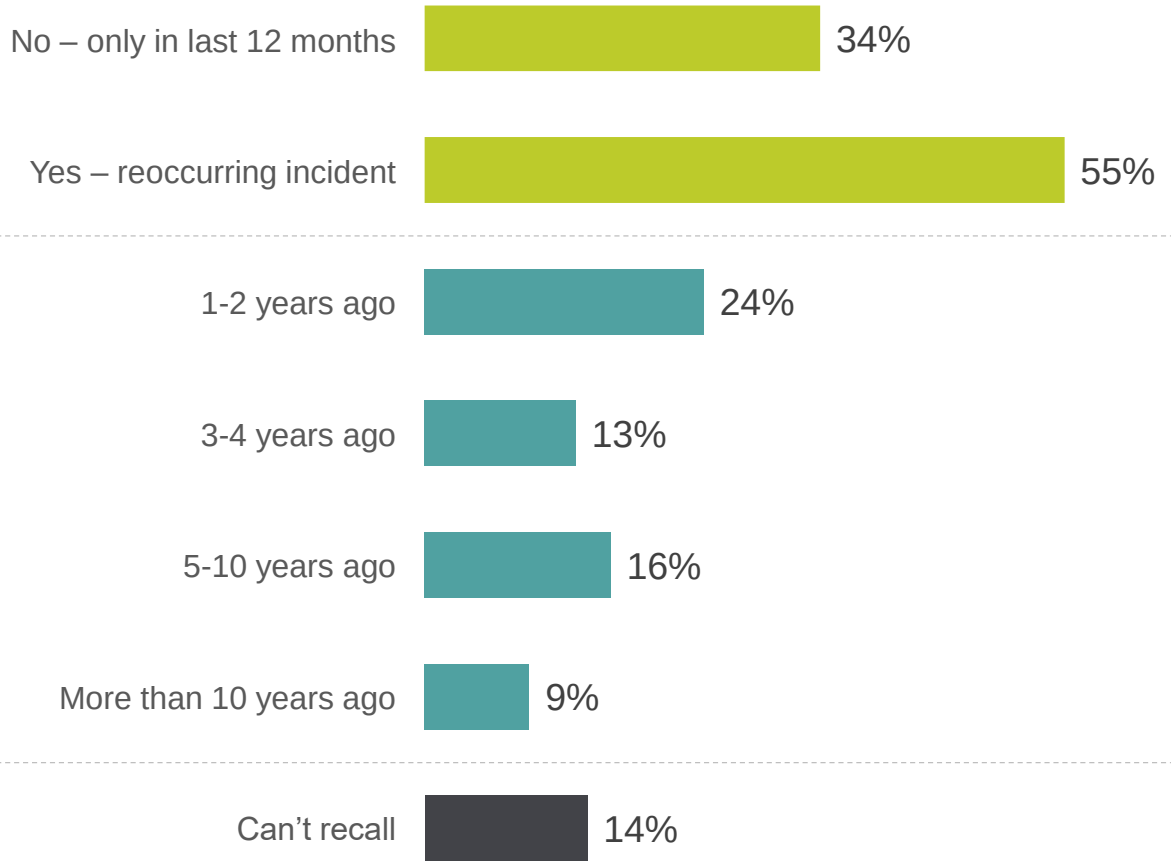
"I try not to turn the flame up too high on the barbecue."

"Clean the fat off the bottom of the barbecue after each use."

Base: Experienced gas-related incident in last 12 months (34)
Source: Q13c. *"And what, if anything, did you do to stop this happening again?"*

GAS: When incidents do occur, they are likely to be reoccurring – just over half of consumers report that the gas incident had previously occurred suggesting they haven't learnt from the experience or feel unable to address it.

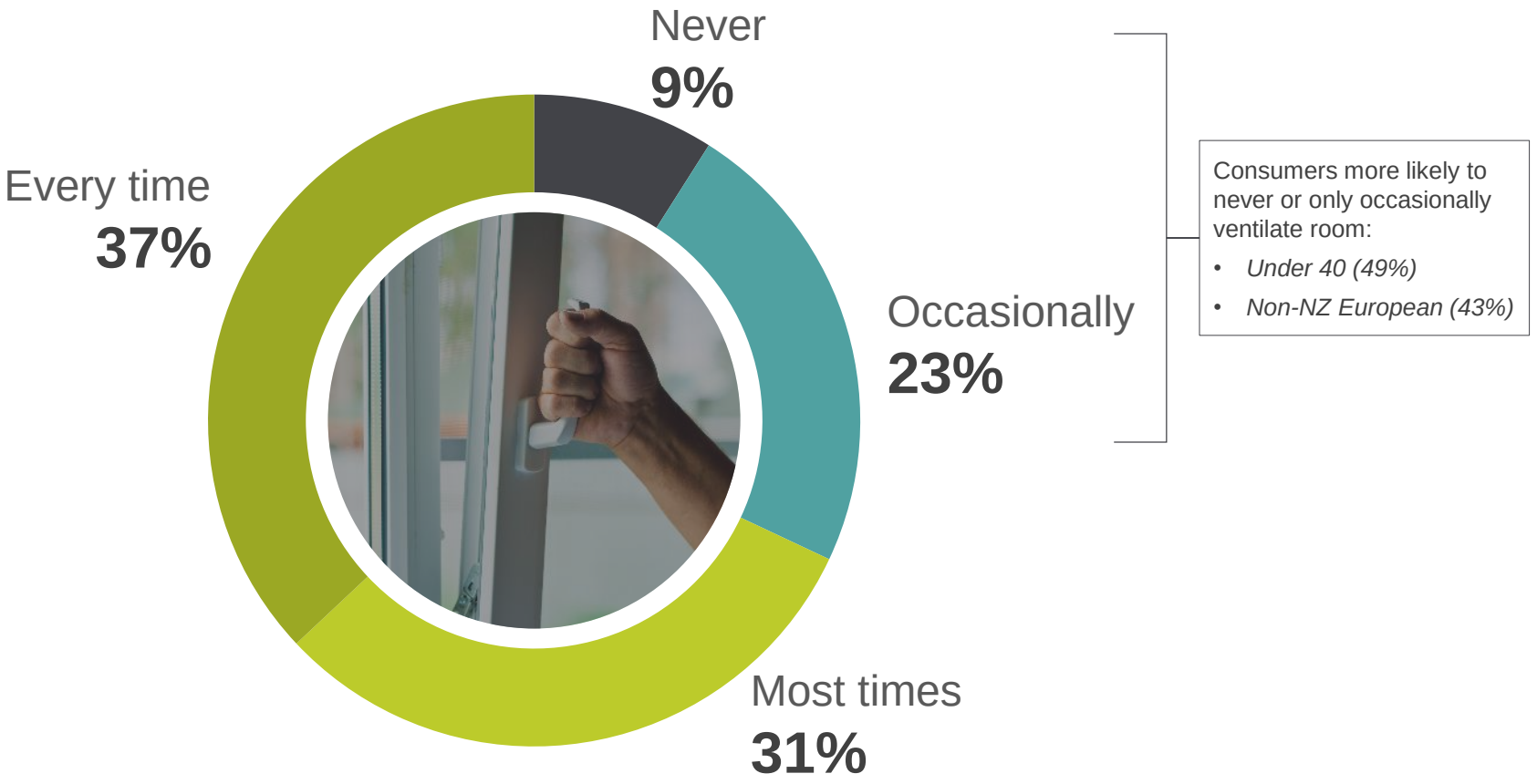
WHETHER GAS INCIDENT HAPPENED BEFORE



Base: Experienced gas-related incident in last 12 months (34)
Source: Q13d. *"Thinking about the gas incident(s) you've told us about, has this occurred in your household **before**?" If yes, when was this?*

GAS: Regular behaviours are also a challenge. One in three portable gas heater users never or only occasionally ventilate the room by opening a window. Consumers aged under 40 and non-NZ Europeans are more likely to display risky behaviour.

HOW OFTEN VENTILATE ROOM BY OPENING A WINDOW



Consumers more likely to never or only occasionally ventilate room:

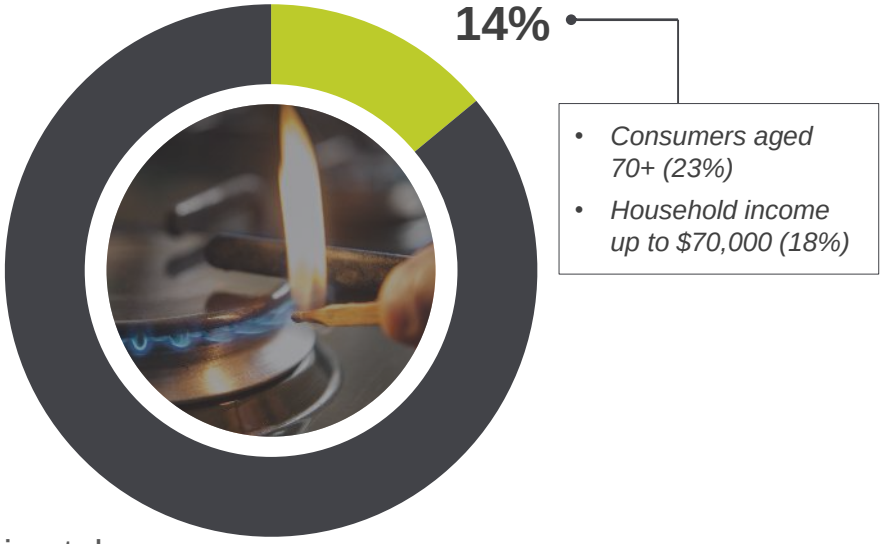
- *Under 40 (49%)*
- *Non-NZ European (43%)*

"It's not too difficult to open a window when using the gas heater."

Base: All consumers who use portable LPG Heater (119)
Source: Q17. *"When you use a portable gas heater, how often do you ventilate the room by opening the window?"*

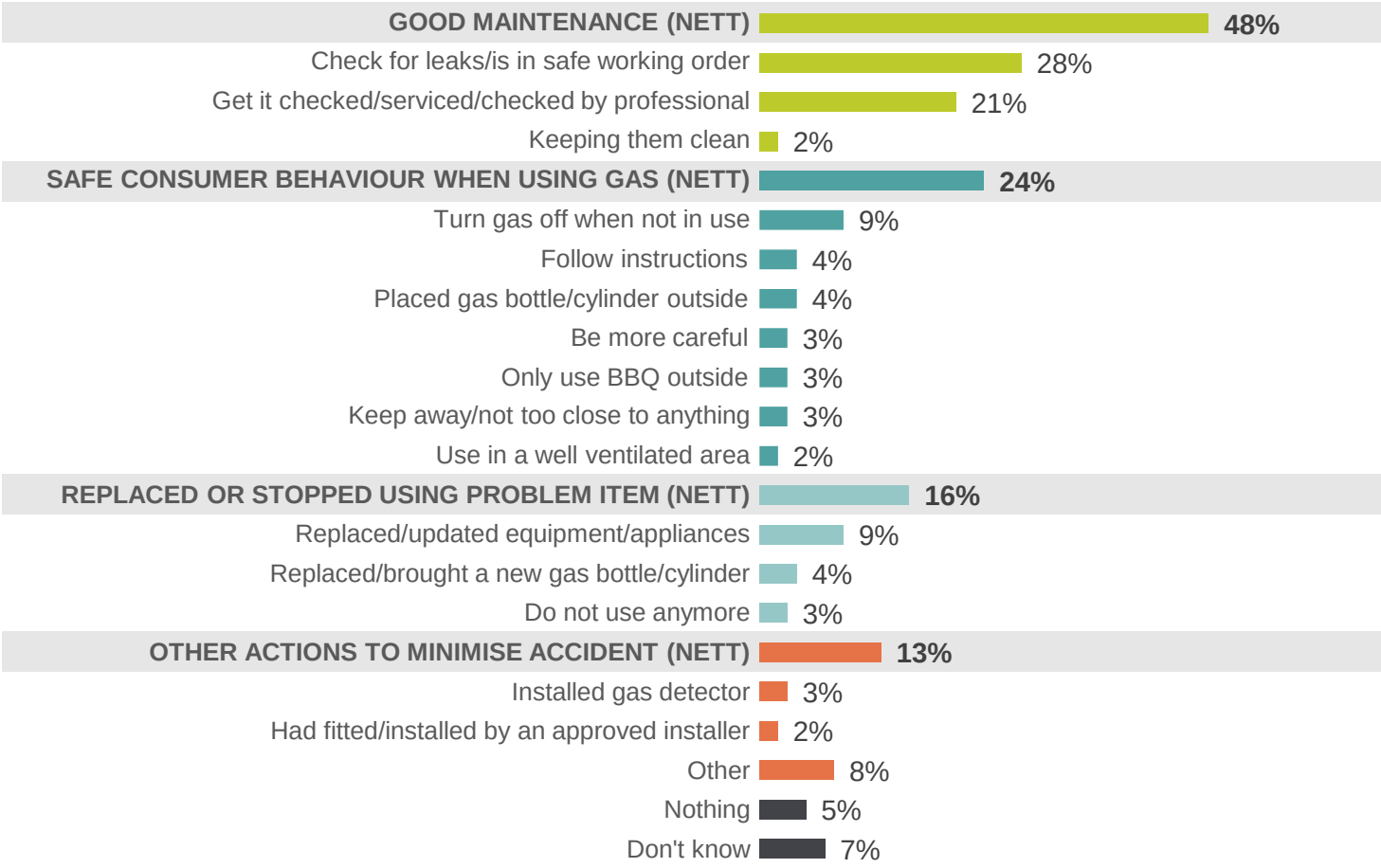
GAS: Only one in seven gas consumers recall doing something to reduce the risk of a gas-related accident at home. Maintenance and safe use are the most common actions amongst those who have done so.

WHETHER ACTION TAKEN TO REDUCE RISK OF GAS INCIDENTS



Base: All gas consumers (789)
Source: Q14a. *"Have you done anything specific to reduce the risk of gas related accidents in your home in the last 12 months?"*

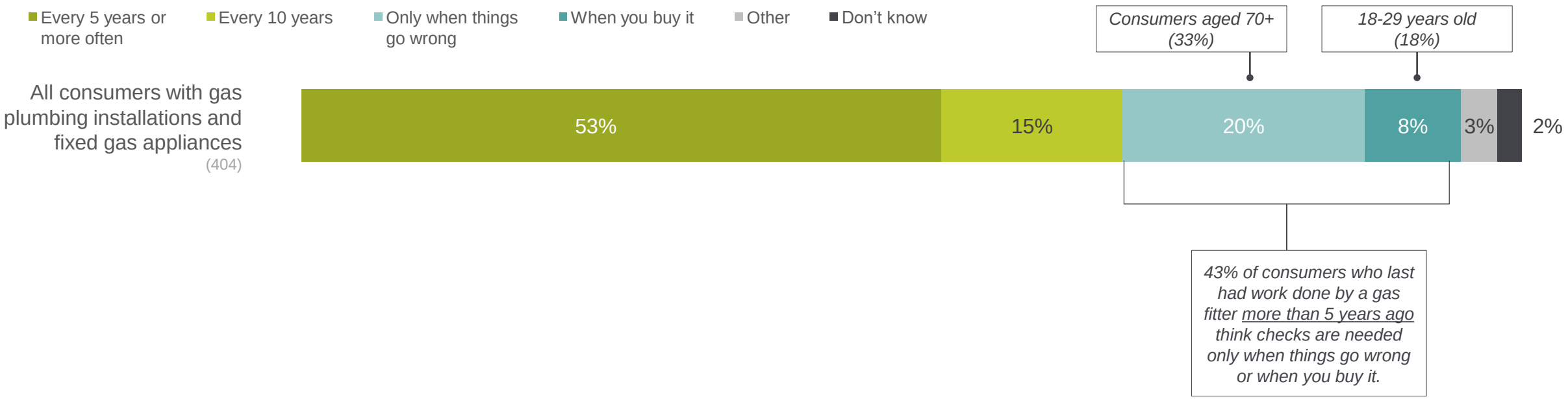
ACTIONS TAKEN TO REDUCE RISK (BASED ON THOSE WHO TOOK ACTION)



Base: Took action to reduce risk of gas accident (118)
Source: Q14b. *"What have you done? Please describe what you did to reduce the risk or fix the problem."*

GAS: Over a quarter (28%) of consumers with gas plumbing or appliances believe a qualified person should check household gas plumbing installations and appliances for gas safety only when things go wrong (or when they buy it). This jumps to 43% for those who last had work done by a gas fitter more than five years ago.

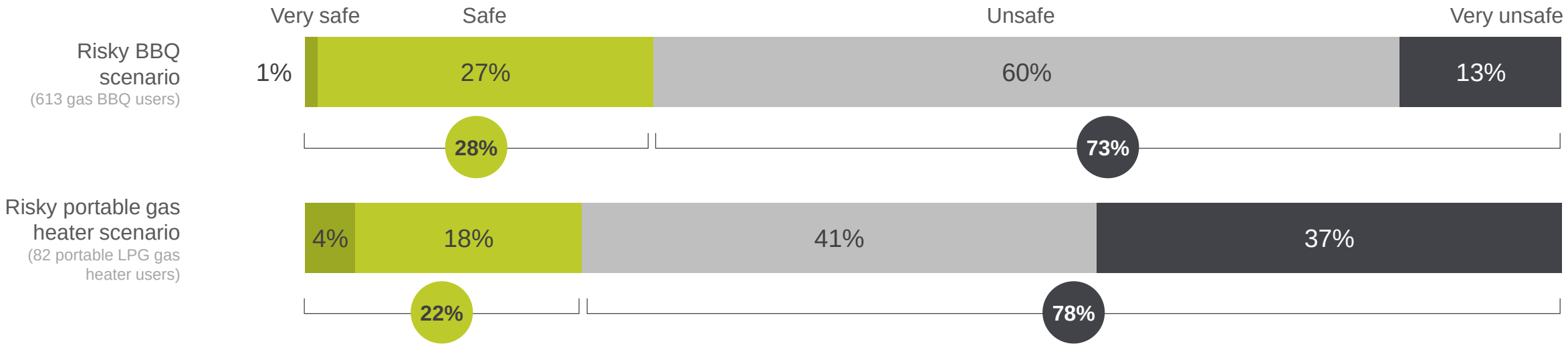
HOW OFTEN GAS PLUMBING INSTALLATIONS AND APPLIANCES SHOULD BE CHECKED FOR GAS SAFETY BY QUALIFIED PERSON



Base: Consumers with gas plumbing or appliances (404)
Source: Q16. *"How often do you think that household gas plumbing installations, and appliances should be checked for gas safety by a qualified person?"*

GAS: When prompted, failure to check LPG gas bottle connections for leaks each year is considered to be safe by more than a quarter of gas BBQ users and around one in five portable LPG gas heater users.

PERCEIVED SAFETY OF GAS SCENARIOS



> *"I've literally done this, just gone and done a bit of a shaky to see what the gas level is like, a bit of a feeler and then gone 'that feels right' and then roared straight into it. I feel fine about it. Reflecting on it, I probably think 'oh maybe I should be checking the connections' but if I'm honest, I look at it and go 'it sounds right'."*

Source: Q18. *"How safe or unsafe do you think this scenario is?"* ***BBQ scenario:*** *"It's the beginning of summer and John is about to use the BBQ for the first time since last summer. The BBQ is fuelled by an LPG gas bottle. Apart from seeing how much gas he's got, he hasn't checked for anything else. He turns on the BBQ and starts cooking."*
Portable gas heater scenario: *"It's the beginning of winter and John is about to use a portable gas heater in the lounge for the first time since last winter. The heater is fuelled by an LPG gas bottle. Apart from seeing how much gas he's got, he hasn't checked for anything else. He turns the heater on to get warm."*

Summary of key issues with gas

- Gas incidents occur in one in every 25 households – on average about an incident per street per year.
- Gas incidents are not well diagnosed by householders, nor do they always prompt a specific action to remedy.
- Problems are frequently due to set up (e.g. fittings and leaks – often related to LPG bottles) rather than just consumer actions.
- As a consequence, perhaps, they also seem to happen repeatedly (i.e. remain unfixed).
- Proactive maintenance is also patchy. Professional maintenance is not always frequent, and is most often reactive.
- Regular behaviours around reducing gas risks are infrequent, and although most consumers can spot an unsafe scenario, gas risks do not seem to be top of mind.

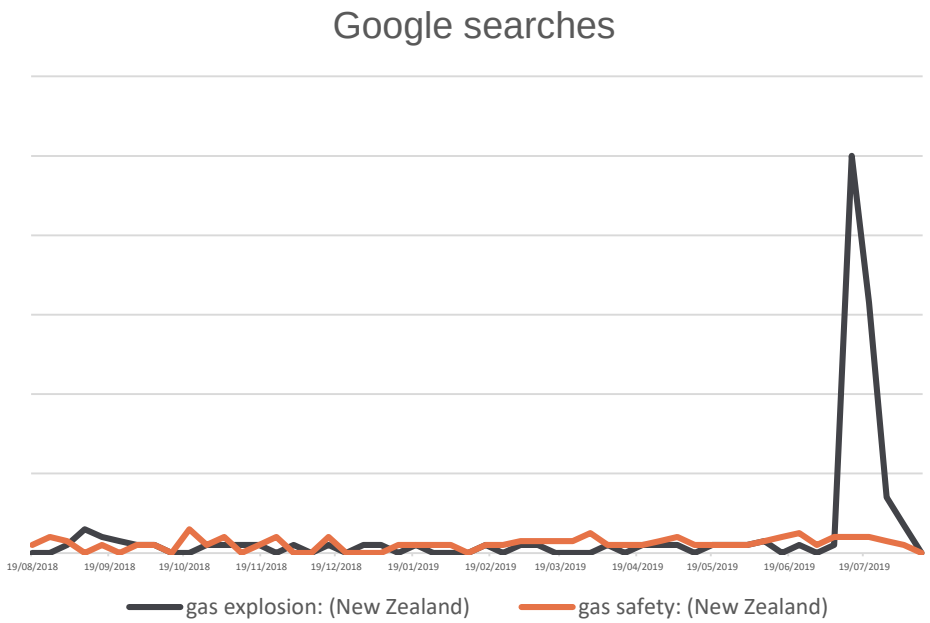
Land Information New Zealand data indicates there are 51,288 roads in NZ (by road name). Statistics New Zealand estimates there are 1,729,300 households in NZ (September 2017). There are therefore 34 households per road on average.

There is a disconnect between people's fear of gas (as evidenced in the qualitative phase) and their actions around being safe with gas.

Consumers' natural fear of gas is not translating into…

- **Proactive maintenance** of gas fittings and appliances.
- **Comprehensive fixes** of replacement fittings or appliances causing problems.
- Widespread and consistent **everyday actions** to stay gas safe.

A case in point: highly visible consequence did not result in higher online interest in gas safety.

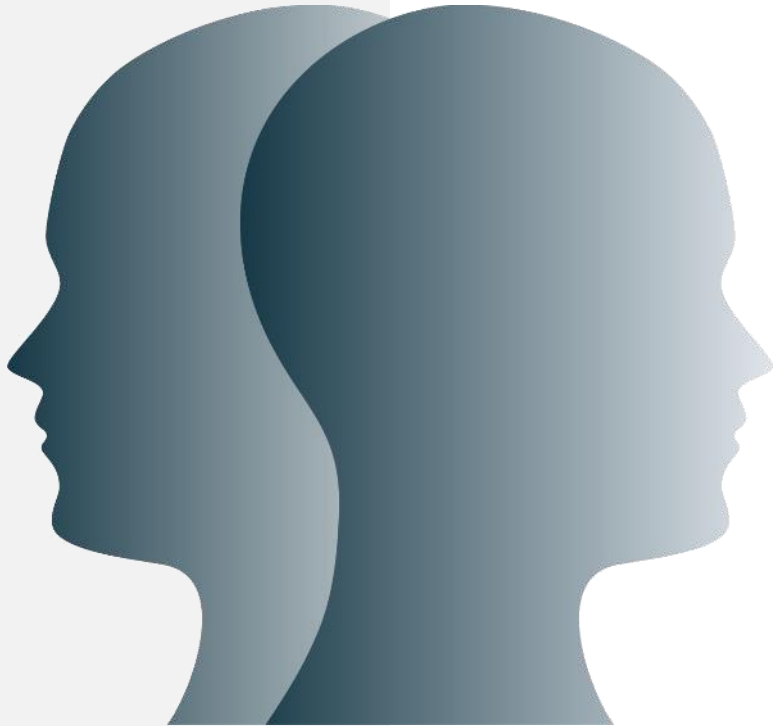


GAS: There are two core behaviour gaps that could be further addressed…

Behaviour gaps

Regular maintenance of gas fittings and appliances

Currently:
- Only 7% carry out[1] maintenance each year
- 55% of gas incidents reoccur[2].



Safety in everyday gas usage

Currently:
- 11% of gas incidents attributed to BBQ[3]
- 28% considered risky BBQ scenario to be safe[4]
- 32% of portable gas heater users don't usually open a window[5]
- 22% considered the risky LPG heater scenario safe[6]

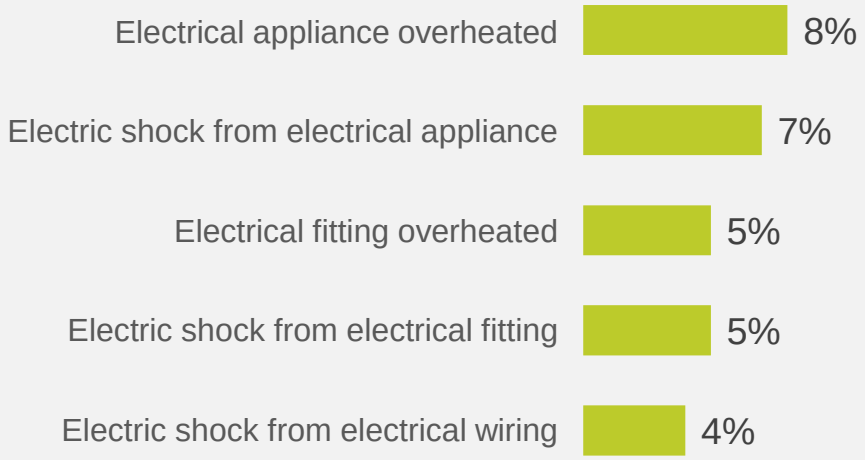
[1] Q14a Action taken + Q14b good maintenance (see page 16)
[2] Q13d: Whether gas incident happened before (see page 14)
[3] Q13b: Cause of gas incident in last 12 months (see page 12)
[4] Q18 Risky scenario is considered safe (see page 18)
[5] Q17: Ventilation of LPG heaters (see page 15)
[6] Q18 Risky scenario is safe (see page 18)

ELECTRICITY: One in six households experienced at least one electrical incident/shock in the last year, with an average of nearly two incidents/shocks in each of these households. Appliances are a slightly more common source of electrical incidents. However, fittings and wiring cause more incidents in low income households.

HOUSEHOLD ELECTRICAL INCIDENTS IN LAST 12 MONTHS

These households experience an average of 1.8 incidents per year.

1 in 6 (16%) households experienced an 'electrical incident' in the last 12 months



Electrical incidents are higher among:

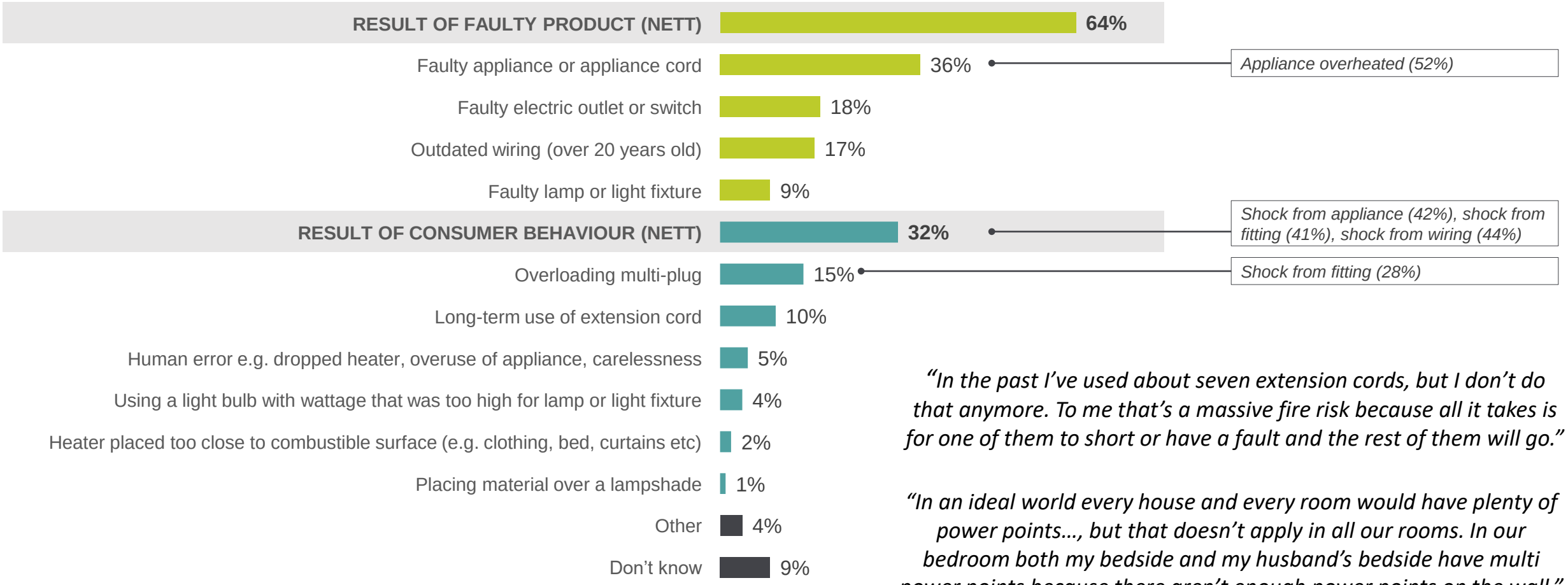
- *Renters (22%)*
- *Younger consumers (27% of 18-29 year olds)*
- *Māori/Pacific consumers (28%)*
- *Households with children under 15 (22%)*

Low income households (up to $30,000) are nearly twice as likely to experience incidents from electrical wiring or an electrical fitting (15% vs 8% of higher income households).

Base: All respondents (1,107)
Source: Q2a. *"Have any of these electrical incidents happened in the last 12 months?"*

ELECTRICITY: Two thirds of consumers attribute their electrical incident(s) to faulty product, while a third acknowledge unsafe consumer behaviour. Overloading multi-plugs is perceived to be a big cause of electric shocks, and together with extension cords contribute to electrical incidents for around a quarter of consumers.

CAUSE OF ELECTRICAL INCIDENT



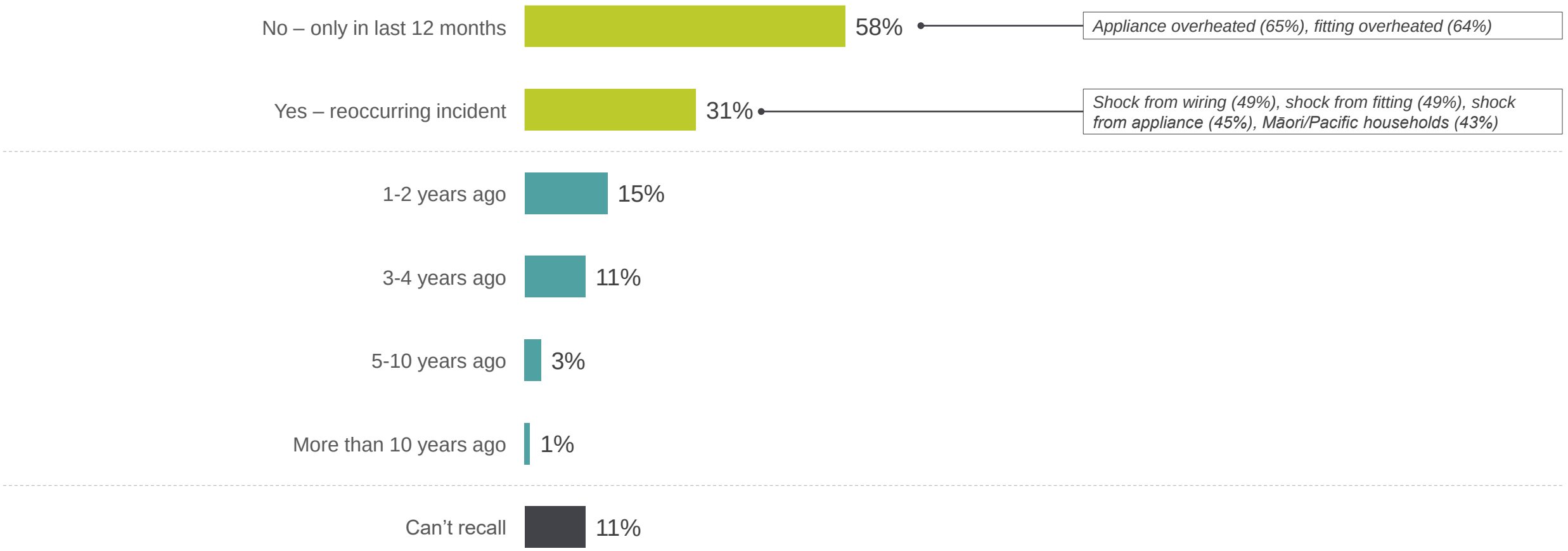
"In the past I've used about seven extension cords, but I don't do that anymore. To me that's a massive fire risk because all it takes is for one of them to short or have a fault and the rest of them will go."

"In an ideal world every house and every room would have plenty of power points…, but that doesn't apply in all our rooms. In our bedroom both my bedside and my husband's bedside have multi power points because there aren't enough power points on the wall."

Base: Experienced electrical incident in last 12 months (188)
Source: Q2b. *"Thinking about the electrical incident(s) you had in the last 12 months, what was the cause?"*

ELECTRICITY: Recurring electrical incidents give us insight into whether consumers learn from these experiences and/or feel able to address them. While the electrical incident had only occurred in the last 12 months for a small majority, nearly one in three (30%) said it had happened before. Electric shocks are most likely to reoccur.

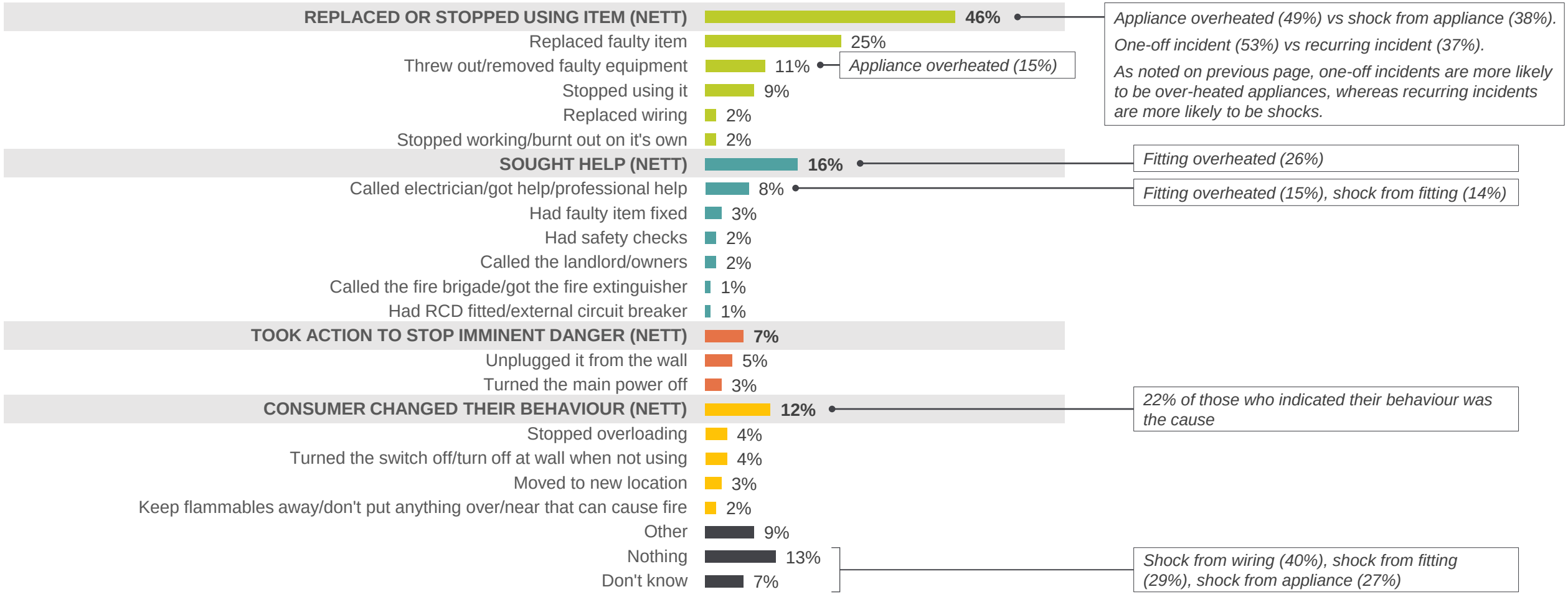
WHETHER ELECTRICAL INCIDENT HAPPENED BEFORE



Base: Experienced electrical incident in last 12 months (188)
Source: Q2d. *"Thinking about the electrical incident(s) you've told us about, has this occurred in your household **before**? If yes, when was this?"*

ELECTRICITY: Most consumers did something to stop the electrical incident reoccurring, most often replacing or stopping using the faulty item. However, electric shocks are much less likely to prompt preventative action.

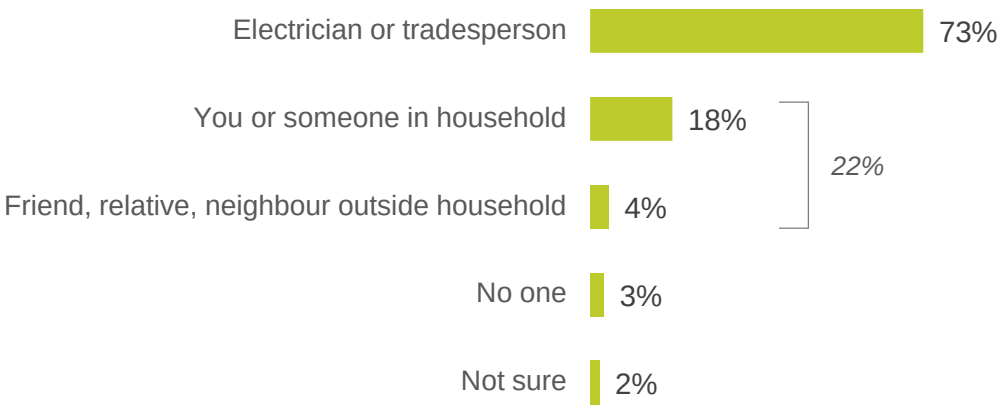
ACTION TAKEN TO PREVENT REOCCURRENCE OF ELECTRICAL INCIDENTS



Base: Experienced electrical incident in last 12 months (188)
Source: Q2c. *"And what, if anything, did you do to stop this happening again?"*

ELECTRICITY: DIY electrical work occurs in one in five (22%) households, and especially by younger consumers.

WHO DOES ELECTRICAL WIRING OR APPLIANCE REPAIRS

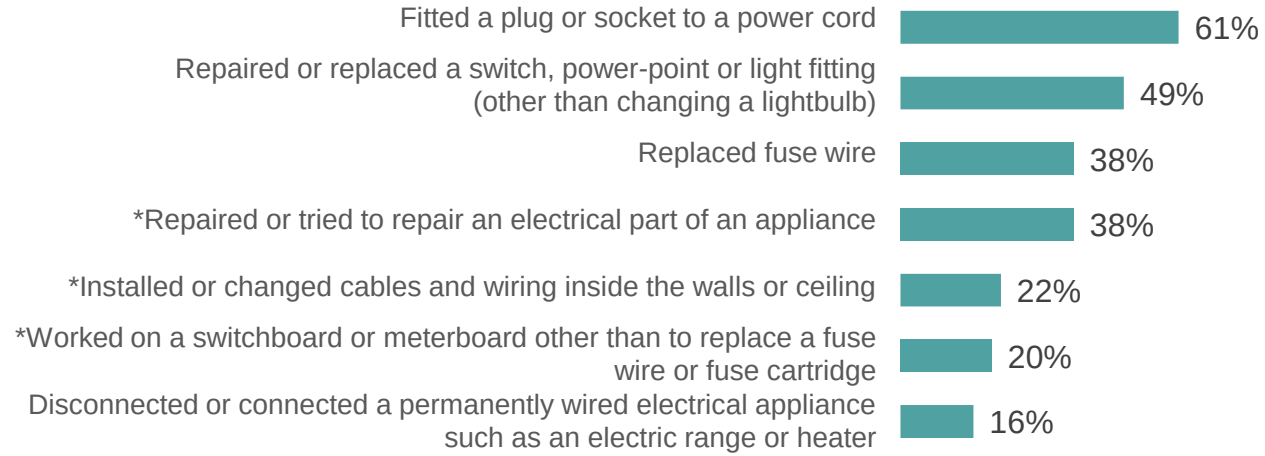


Other demographic patterns:

- *Home owners are more likely than renters to use a tradesperson (77% vs 66%)*
- *Men more likely than women to DIY (22% vs 3%)*
- *Consumers of 'other ethnicity' are more likely to use a household member or family/friend/relative (32% vs 22% of the remaining ethnic groups)*
- *Groups more likely to have no one do it or be unsure:*
  - *Pacific people (18% vs % of 4% of non-Pacific)*
  - *Lower income households (12% of households with up to $30,000, vs 3% of higher income households).*

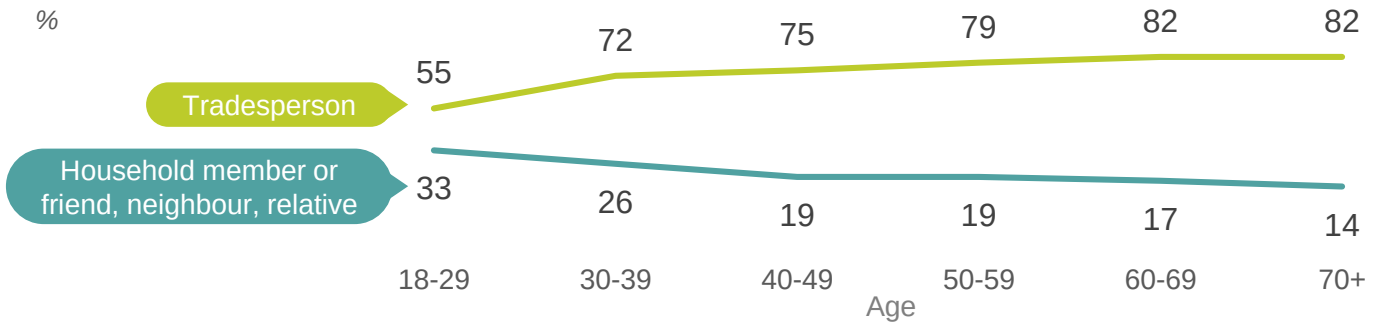
Base: All respondents (1,107)
Source: Q4. *"For your household, who is **most** likely to do electrical wiring or appliance repairs?"*

TYPE OF DOMESTIC OR ELECTRICAL WORK DONE



Base: Household member does electrical wiring or appliance repairs (203)
Source: Q5. *"In the last 12 months, have you or someone else who lives in your household done these…"*

DO-IT-YOURSELF DECREASES WITH AGE



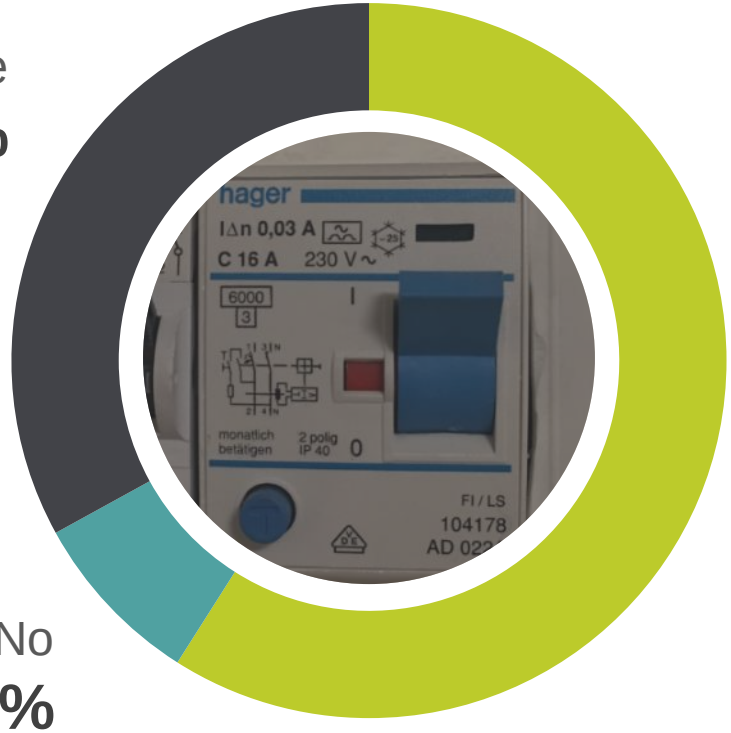
*WorkSafe advises that these activities should be done by a professional technician.

ELECTRICITY: Consumer safety literacy is lacking for safety switches on the main power supply. While over half of consumers report having a safety switch, a third are unsure. Just 8% say they don't have one.

WHETHER HAVE SAFETY SWITCH ON MAIN POWER SUPPLY/FUSE BOX

Not sure
33%

Women (41% vs 24% of men)



Yes
59%

Consumers aged 70+ = (69%)
Men (66% vs 53% of women)
Home owners (62% vs 53% of renters)

No
8%

Base: All respondents (1,107)
Source: Q1b. *"Do you have **a safety switch** on the main power supply/fuse box in your house? A safety switch is an electrical safety device that gives protection by disconnecting the electrical supply when an abnormality is detected in electrical supply."*

ELECTRICITY: Only a quarter have taken action to reduce the risk of electrical accidents. Actions include items or fittings being fixed/replaced but often they relate to work arounds and moderated behaviour.

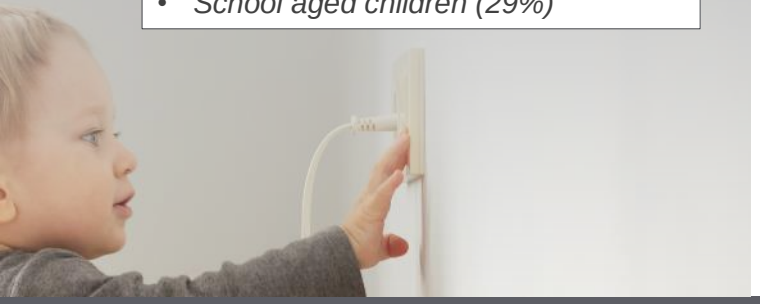
ACTIONS TAKEN TO REDUCE RISK

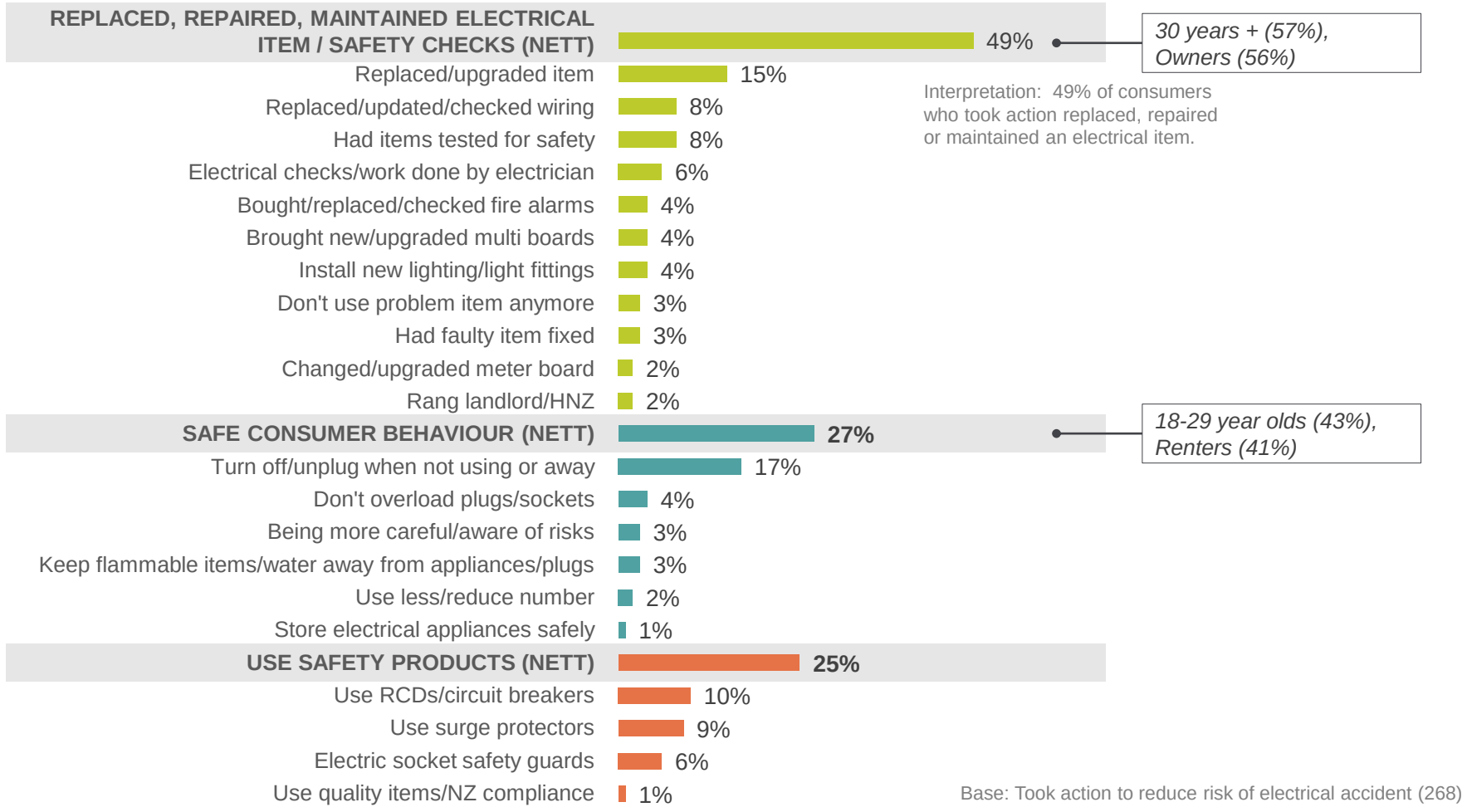
24% of all electricity consumers have taken action to reduce the risk of electrical incidents in the last 12 months.

Base: All consumers (1,107)

This is higher among households with::

- *Pre-school children (35%)*
- *School aged children (29%)*

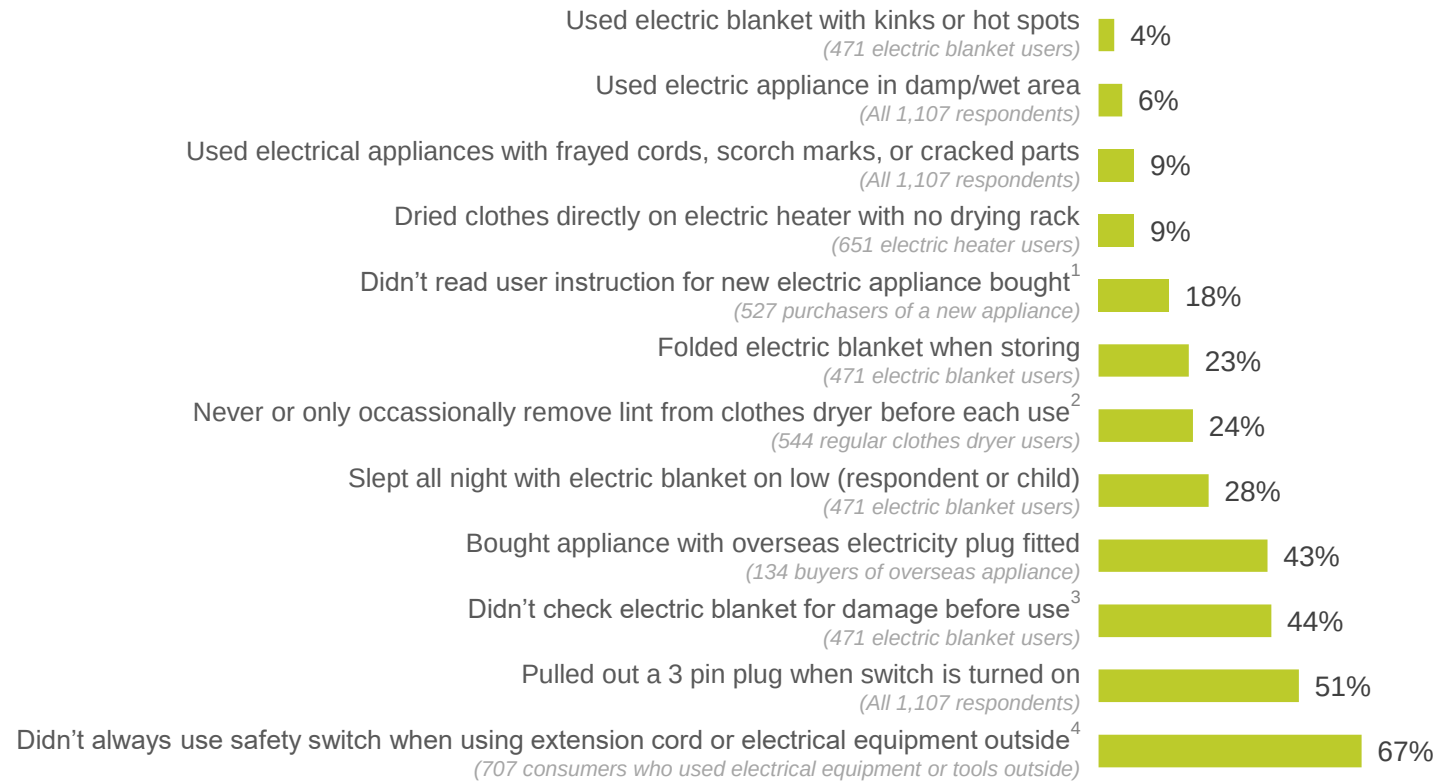




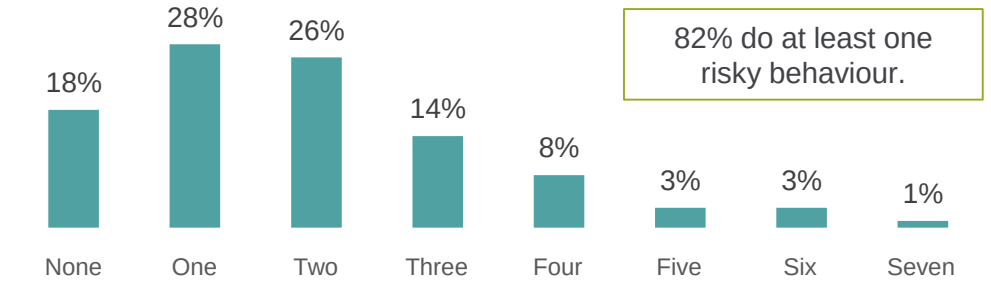
Source: Q3a. *"Have you done anything specific to reduce the risk of electrical accidents in your home in the last 12 months?"*
Q3b. *"What have you done? Please describe what you did to reduce the risk or fix the problem."*

ELECTRICITY: Most consumers (82%) do at least one of the 12 risky behaviours measured, with around a quarter doing three or more. The most common risky behaviours relate to use of safety switches for outdoor electrical equipment and pulling out a 3-pin plug when the switch is turned on.

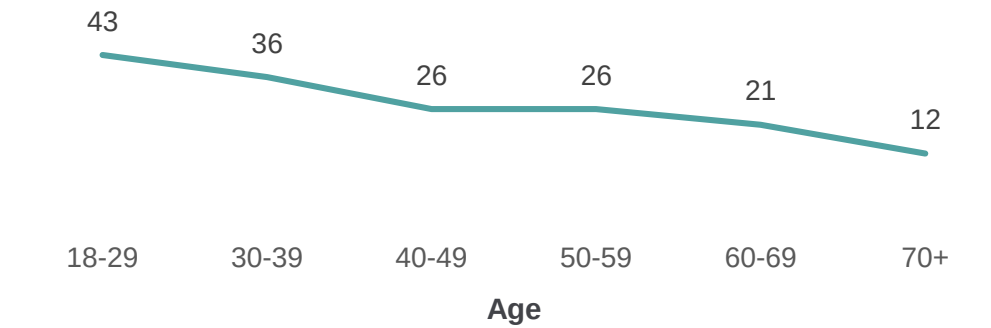
RISKY BEHAVIOURS
(% exhibit risky behaviour in last 12 months)



NUMBER OF RISKY BEHAVIOURS UNDERTAKEN
(of 12 risky behaviours measured)



% who do 3 or more unsafe behaviours

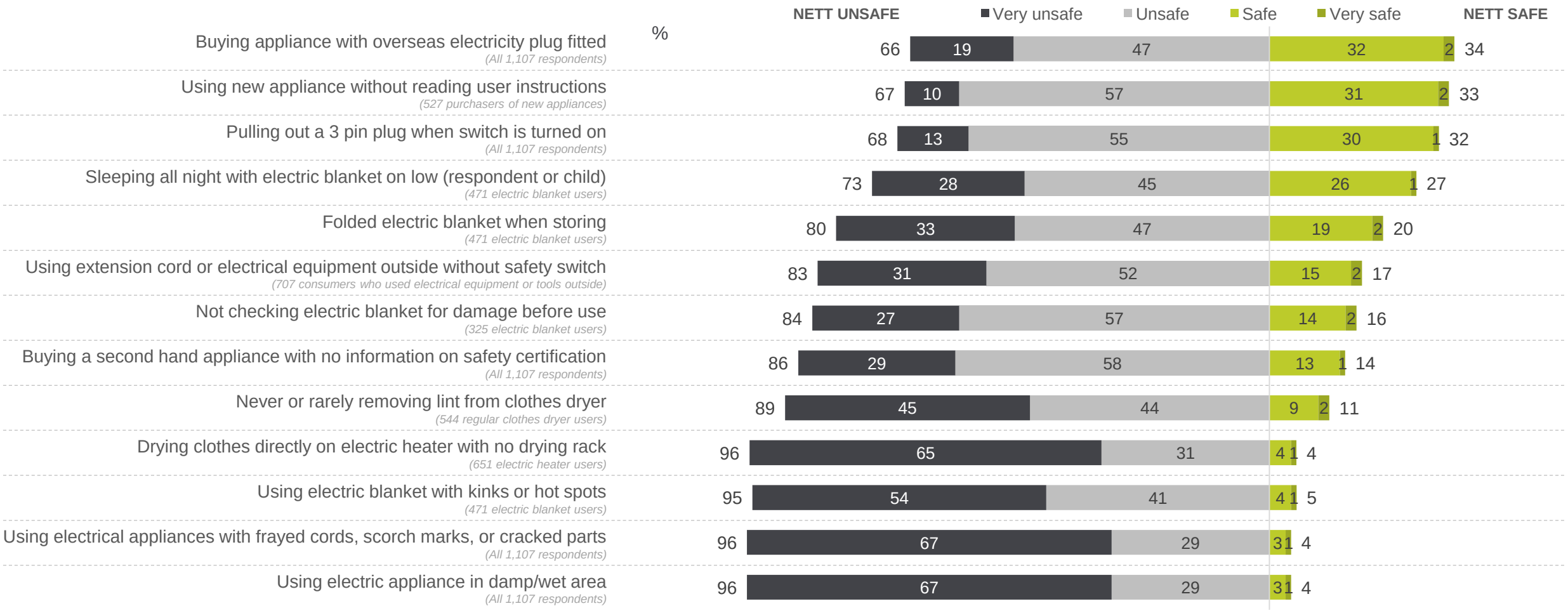


[1]Respondents who bought a new appliance in the last 12 months were asked if they had read the user instruction for a new electric appliance they bought in the last 12 months. The chart shows the % who said they had not.
[2] Regular clothes dryer users were asked how often in the last 12 months they (or someone in their household) have removed lint from a clothes dryer before each use. Results were 'every time' (38%), 'most times' (39%), 'occasionally' (18%), and 'never' (6%). The graph shows the % who said 'occasionally' or 'never'.
[3] Electric blanket users were asked if the last 12 months they checked an electric blanket for damage before using it. The graph shows the % of respondents who said they had not.
[4] Respondents who used electrical equipment or tools outside in the last 12 months were asked how often they (or someone in their household) have used a safety switch when using an extension cord or electrical equipment outside. Results were 'every time' (33%), 'most times' (27%), 'occasionally' (24%), and 'never' (16%). The graph shows the % who said 'most times', 'occasionally' or 'never'.

Base: Varies (see numbers and descriptions in brackets)
Source: Q7a. *"In the last 12 months have you…"*
Q7b. *"In the last 12 months, how often have you or has someone in your household…"*

ELECTRICITY: Of the 12 risky behaviours measured consumers are least concerned about overseas electricity plugs, failing to read user instructions, pulling out a 3-pin plug when the switch is turned on, and 'all-nighters' with an electric blanket.

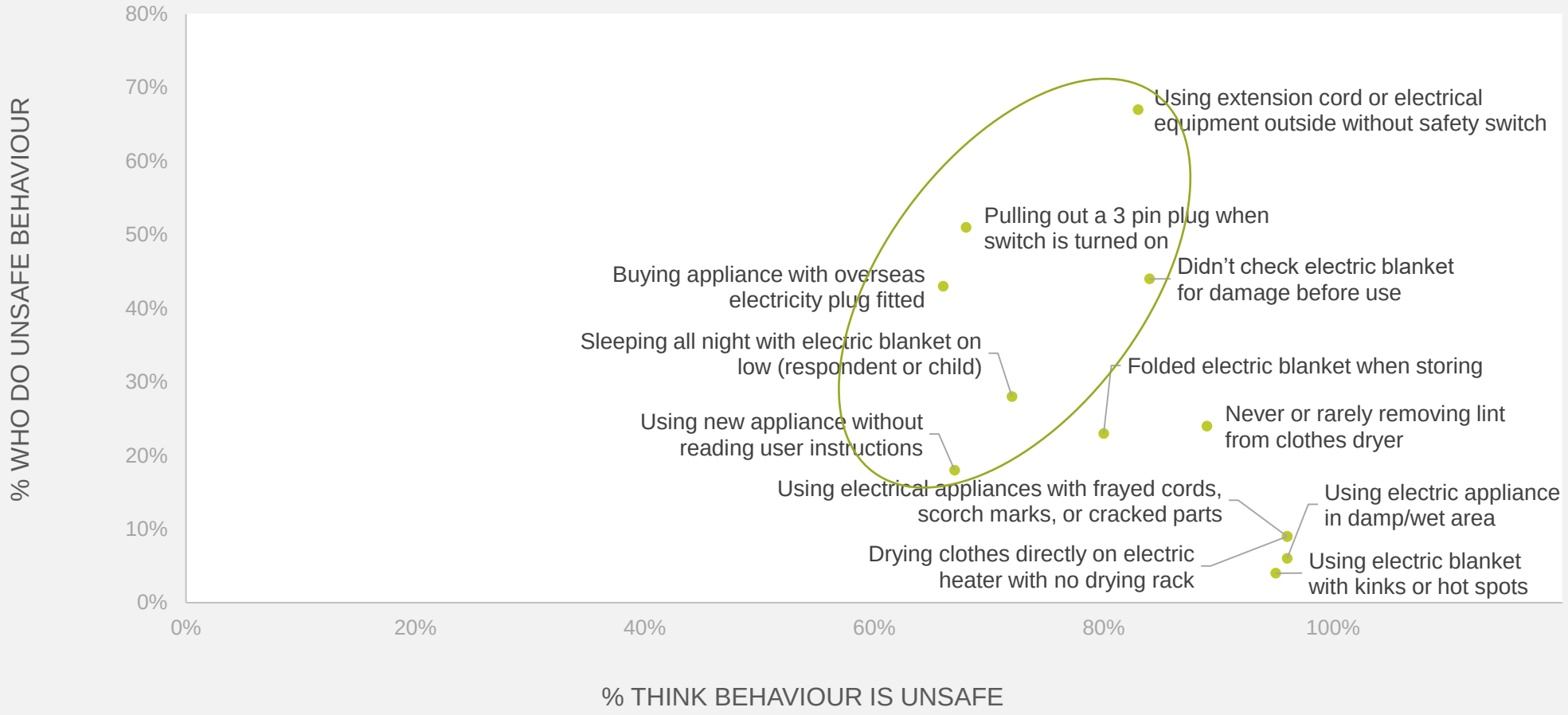
PERCEPTIONS OF SAFETY OF SPECIFIC BEHAVIOURS (%)



Base: Varies (see numbers and descriptions in brackets)
Source: Q6. *"How safe or unsafe do you think each of these activities are?"*

ELECTRICITY: Common behaviours that consumers reject as unsafe may warrant education. These include pulling out a 3 pin plug when switched on, buying an appliance with an overseas electricity plug fitted, sleeping all night with an electric blanket turned on, and not reading user instructions for new appliances.

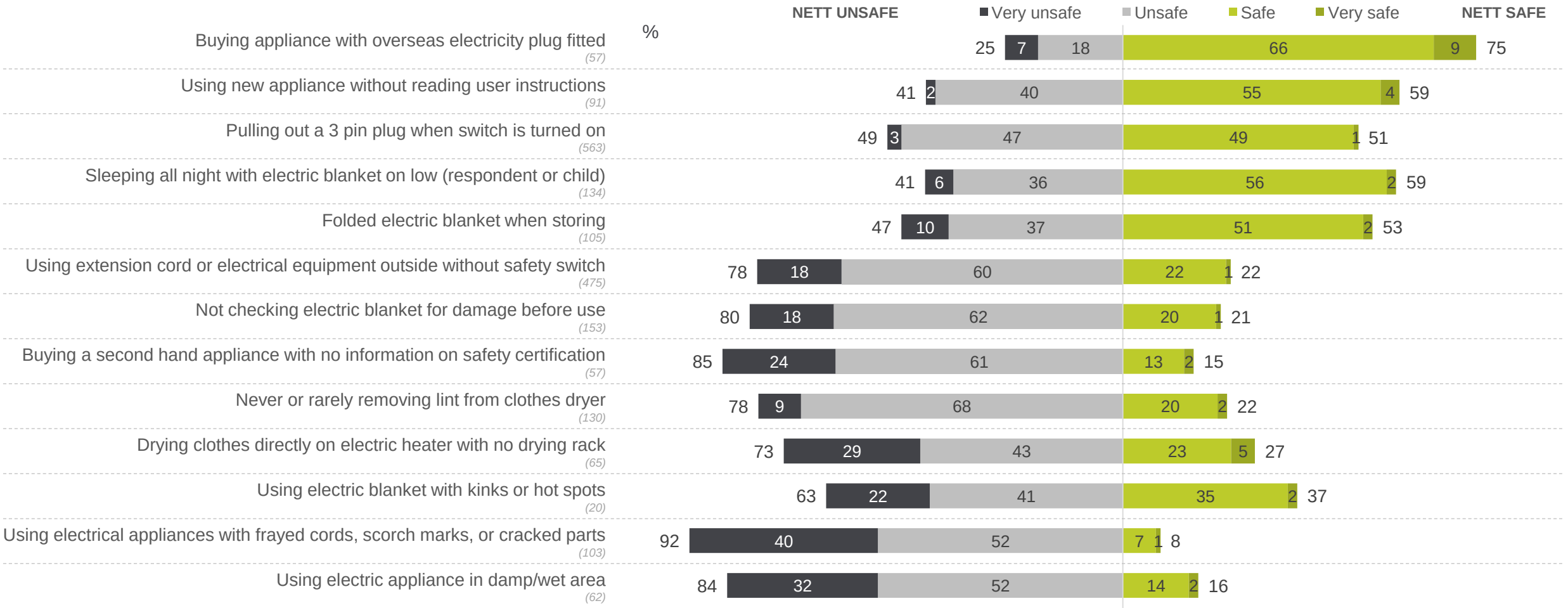
PERCEPTIONS MAPPED AGAINST BEHAVIOURS



Base: Varies (see previous chart)
Source: Q6. *"How safe or unsafe do you think each of these activities are?"*
Q7a. *"In the last 12 months have you…"*
Q7b. *"In the last 12 months, how often have you or has someone in your household…"*

ELECTRICITY: Many consumers who do the risky behaviour know it's unsafe, but do it anyway.

PERCEPTIONS OF SAFETY OF SPECIFIC BEHAVIOURS BASED ON THOSE WHO DO THE RISKY BEHAVIOUR (%)

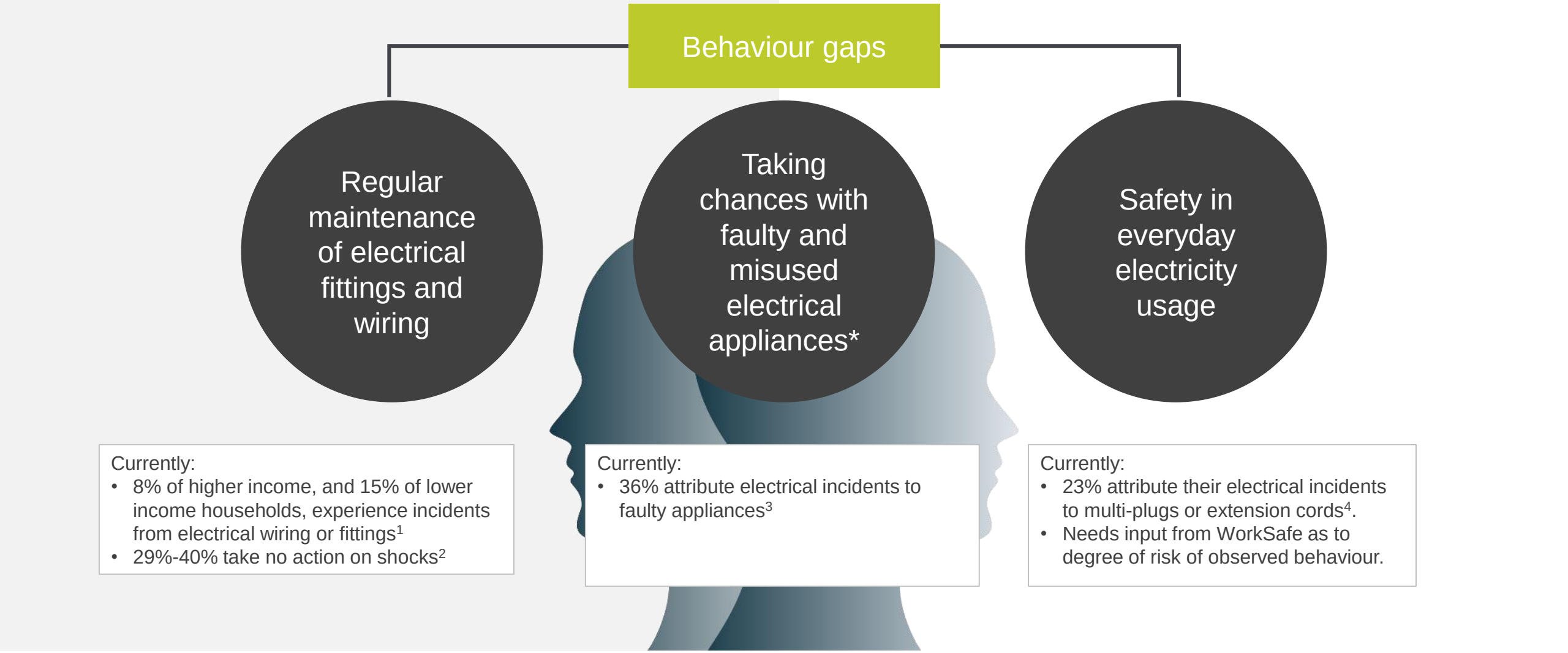


Base: Those who exhibited each of the unsafe behaviours
Source: Q6. *"How safe or unsafe do you think each of these activities are?"*
Q7a. *"In the last 12 months have you…"*
Q7b. *"In the last 12 months, how often have you or has someone in your household…"*

Summary of key issues with electricity

- Electricity incidents are common. Consumers with limited incomes are more exposed – particularly with faults due to wirings and fittings.
- Consumers are more likely to generally ascribe electrical problems to the fault of the appliance or the wiring (rather than their own actions).
- Using multiplugs or extension cords for electrical ‘work arounds’ are everyday consumer behaviours that are clear risk factors.
- Householders normally solve electrical problems by tackling the offending object. However, if it is more difficult or fundamental (e.g. wiring) it may not be tackled at all (instead, work arounds put in place such as not using a socket).
- Proactive risk reduction measures are not common – three quarters of consumers cannot recall any in the last year.
- Repairs mostly involve a professional – but this is less likely for those most vulnerable.
- Consumers seem to be relatively comfortable with the risks that they take – apart from things which are obviously (visibly) unsafe.

ELECTRICITY: There are three core behaviour gaps that could to be further addressed…



[1] Q2a: Incidents in last 12 months (see page 23)
[2] Q2c Actions taken (see page 25)
[3,4] Q2b: Causes of incident (page 24)

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How committed are consumers to safe behaviour?

Next we explore how consumers segment by their commitment to the safe use of gas and electricity, and what common characteristics consumers within each segment share.

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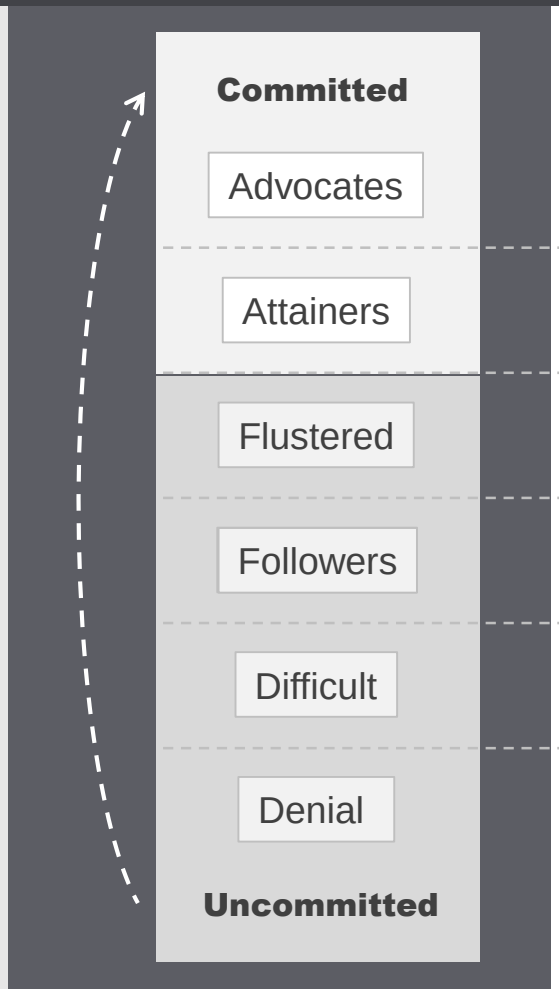
Safe behaviours are never consistent across the board. If we can diagnose where a consumer lies and then strengthen their commitment to safe behaviour, we increase the chance they'll follow through with it.

COMMITMENT TO USING ELECTRICITY AND GAS SAFELY

Recent behavioural theory points to the significance of 'commitment' to a behaviour in determining the likelihood of action.

The more strongly an individual is committed to a stated action (or the more we can strengthen their commitment through communications or interventions), the more likely they will be to behave in this way. As such, understanding the drivers and barriers of their commitment (or openness) helps us design strategy that will reduce the gap between stated intention and actions or values among those consumer segments for which there is most opportunity.



The strongest commitment (consciously and unconsciously). They are most likely to role-model the right behaviours and seek to influence change among those around them.

Strongly committed to the correct behaviour, however, they are unlikely to actively seek to influence others – unless inspired to do so.

Strongly conflicted in their behaviour. While they may not 'actively' want to exhibit wrong behaviours and go against the 'social norm', their unconscious attitudes serve as barriers.

A desire to do the 'right' behaviour, but strongly influenced by those around them – the 'loudest voice' and their perception of 'social norm'. In this research, they appear to currently be more influenced by negative social norms.

The most negative in their behaviours and attitudes. They knowingly exhibit the undesirable behaviour and actively resist change. Very few respondents in this research were found in this segment.

Does not acknowledge the behaviour or value, nor that the issue is something that should be taken seriously. They are the most likely to be exhibiting the undesirable behaviour.

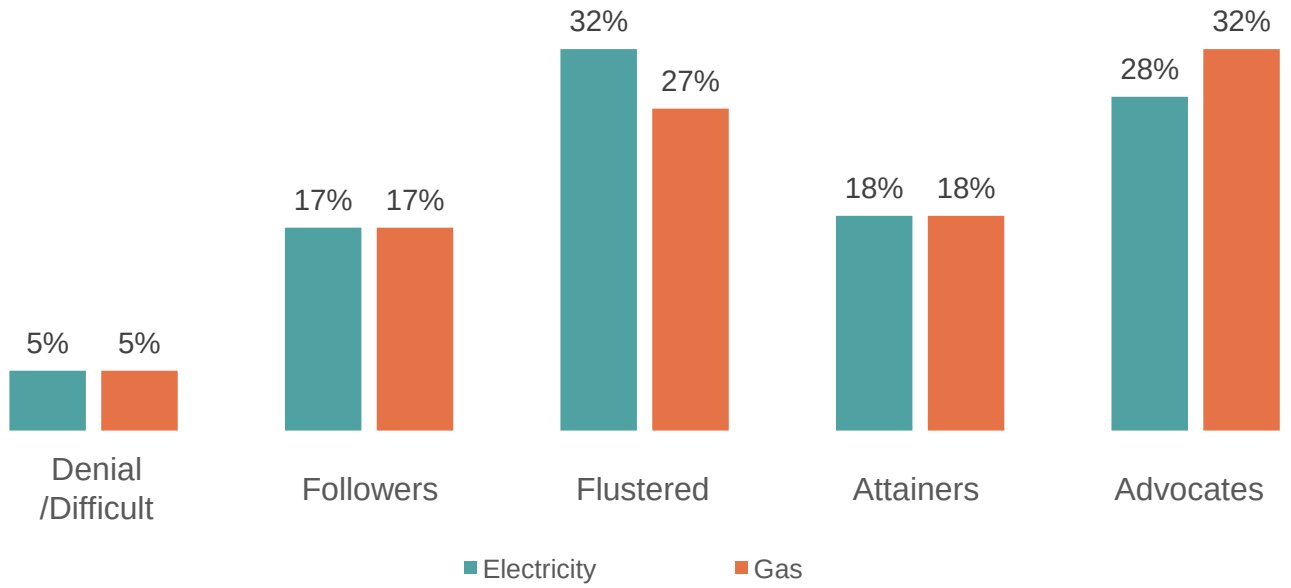
What is consumers' level of commitment to safe use of electricity and gas? The electricity and gas consumer populations can be broken down into five key clusters.

WHAT'S THE LEVEL OF COMMITMENT TO THE SAFE USE OF ELECTRICITY AND GAS?

In the context of commitment to using electricity and gas safely, around half of consumers are fairly fluid in nature. The desire is there for many, but change will depend on what others do (17% are Followers) or they are conflicted and will need their points of conflict resolved (32% of electricity consumers and 27% of gas consumers are Flustered).

Sitting within the population is 5% who simply do not believe that using electricity and gas safely is necessary or required. This hard core segment (Denial/Difficult) may be more difficult to shift with communications and require other interventions.

Note, most of this segment in this research are Denial (with just a handful of Difficult consumers).



From a highly committed perspective, 46% of electricity consumers and 50% of gas consumers are committed to using electricity and gas safely (Advocates or Attainers). They recognise the importance, feel capable and aim to be safe wherever possible.

Over a quarter (28% of electricity consumers and 32% of consumers) are key influencers of others (our Advocates) – they will drive change in others, and seek to influence views, particularly the Followers.

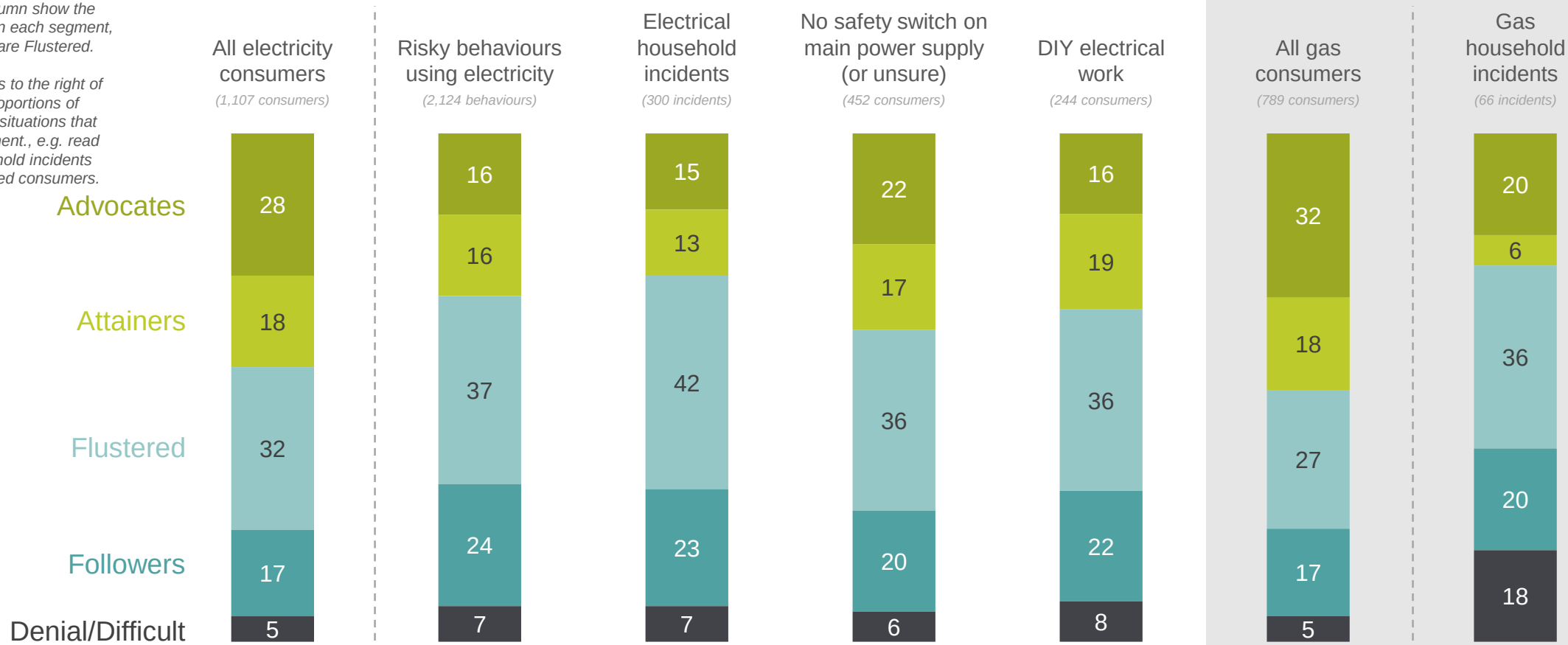
Bases: All electricity consumers (1,107), all gas consumers (789)
The commitment segments are based on a segmentation algorithm derived from survey questions asked in relation to the safe use of electricity and gas seperately.

The uncommitted segments (Denial/Difficult, Followers, and Flustered) account for disproportionately more of the risky behaviours and household incidents.

PROFILES OF RISKY BEHAVIOURS AND INCIDENTS (%)

Percentages in the first column show the proportions of consumers in each segment, e.g. 32% of all consumers are Flustered.

Percentages in the columns to the right of the dotted line show the proportions of risky/unsafe behaviours or situations that relate to a population segment., e.g. read as 42% of electrical household incidents reported were from Flustered consumers.

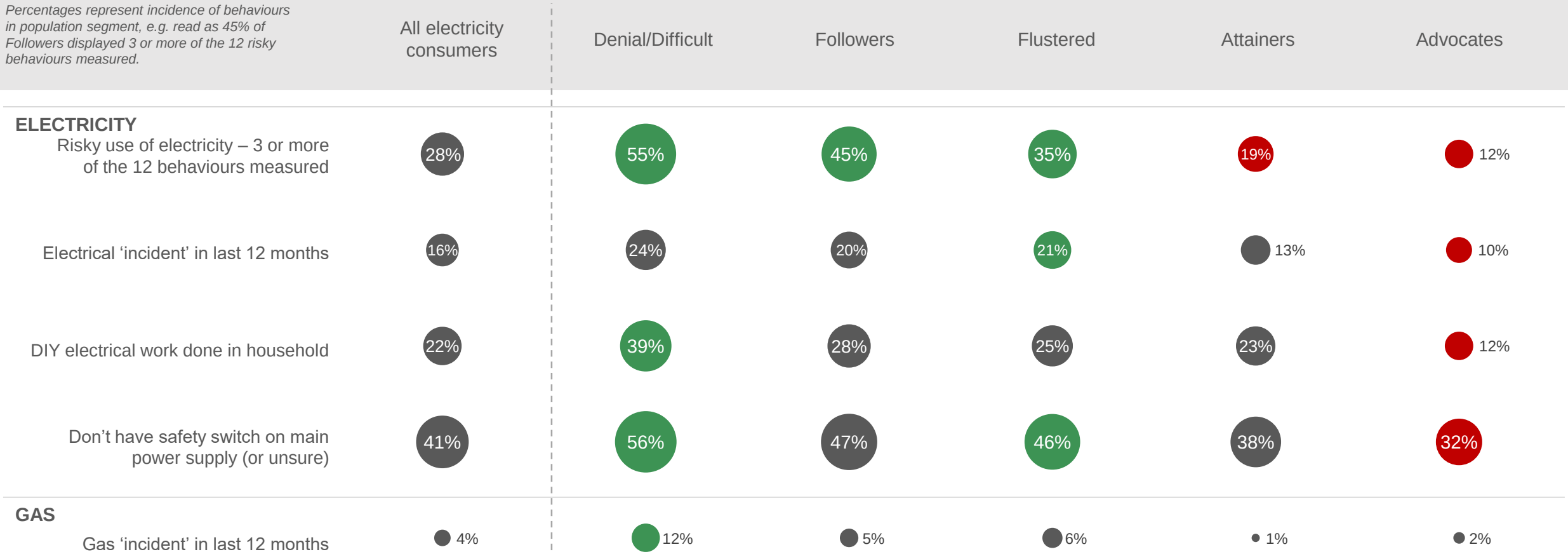


Bases: These are shown at the top of each bar and relate to the total number of behaviour types or household incidents reported. This allows for multiple behaviour types or incidents per consumer. However, the research didn't measure the number of times a particular risky behaviour is carried out.
Source: Q1b, Q2a, Q4, Q7a, Q7b, Q13a.

As expected, the less committed segments display more risky behaviours – and have a lot more incidents!

PROFILE OF USER SEGMENTS BY RISKY BEHAVIOURS AND INCIDENTS (%)

Percentages represent incidence of behaviours in population segment, e.g. read as 45% of Followers displayed 3 or more of the 12 risky behaviours measured.



Bases: Electricity consumers.

Green bubble indicates significant over-indexing relative to incidence in population

Red bubble indicates significant under-indexing relative to incidence in population

GAS: The behaviour gaps identified in the problem section are influenced by where they sit on the segmentation – though regular maintenance could be improved across the board

PROFILE OF USER SEGMENTS BY KEY BEHAVIOUR GAPS (%)

	All gas consumers	Denial/Difficult	Followers	Flustered	Attainers	Advocates
GAS						
Regular maintenance of gas fittings and appliances	7%	0%	4%	4%	9%	11%
Safe BBQ usage (risky scenario is safe)	28%	42%	30%	27%	32%	23%

Bases: Gas consumers.

Green bubble indicates significant over-indexing relative to incidence in population

Red bubble indicates significant under-indexing relative to incidence in population

ELECTRICITY: Equally with electricity, behaviour gaps cluster amongst less committed segments, although all have issues arising from faulty or misused appliances.

PROFILE OF USER SEGMENTS BY KEY BEHAVIOUR GAPS (%)

	All electricity consumers	Denial/Difficult	Followers	Flustered	Attainers	Advocates
ELECTRICITY						
Action on faulty wirings and fittings (household shock incidence)	6%	14%	6%	10%	4%	3%
Faulty and misused appliances (incident causes)	36%	Very small sample size (n=13)	34%	36%	43%	40%
Prolonged and over usage of extension cords and multiplugs	22%	Very small sample size (n=13)	35%	27%	17%	9%

Bases: Electricity consumers.

Green bubble indicates significant over-indexing relative to incidence in population

Red bubble indicates significant under-indexing relative to incidence in population

ELECTRICITY: Older consumers are prevalent in the more committed segments, whereas younger consumers dominate the less committed segments.

PROFILE OF ELECTRICITY USER SEGMENTS BY GENDER AND AGE

Percentages represent incidence of demographic groups in population segment, e.g. read as 57% of Followers are men.		All electricity consumers	Denial/Difficult	Followers	Flustered	Attainers	Advocates
GENDER	Male	48%	51%	57%	49%	42%	44%
	Female	52%	49%	43%	51%	58%	56%
AGE	18 to 39	37%	72%	64%	43%	25%	16%
	40 to 59	36%	21%	29%	40%	39%	38%
	60+	26%	17%	7%	17%	36%	46%

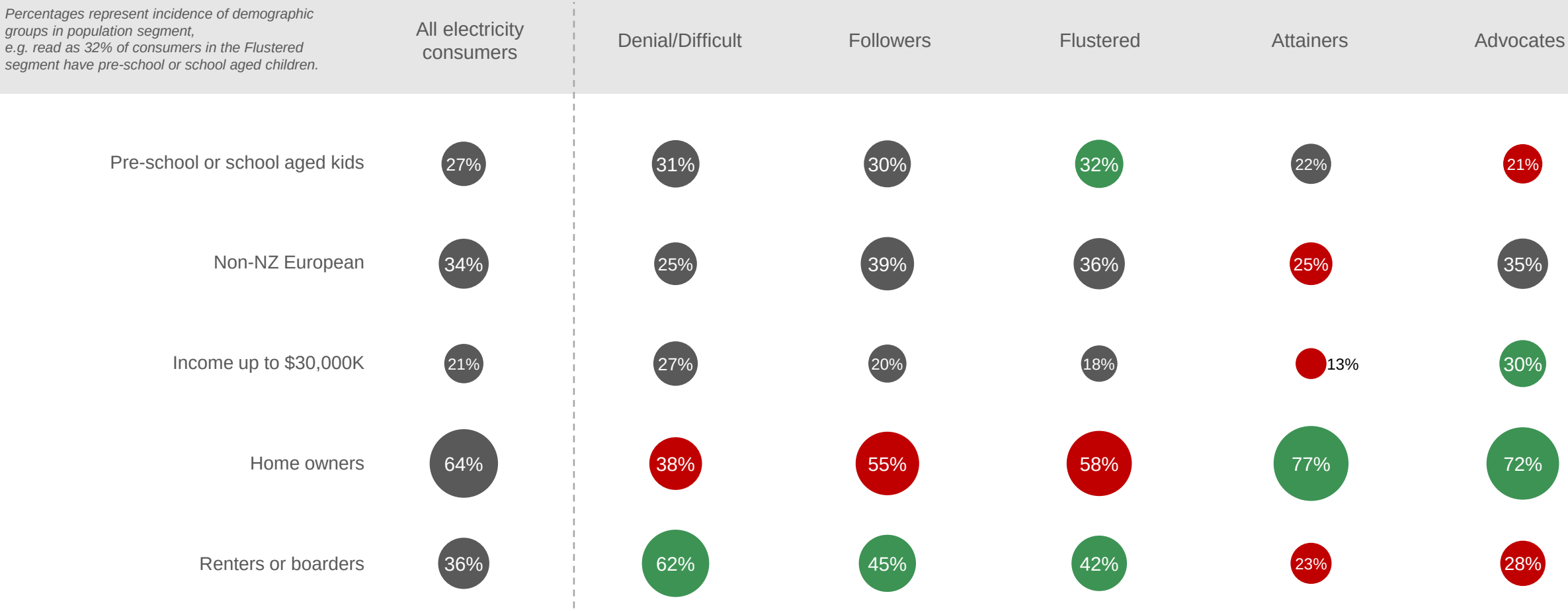
Bases: Electricity consumers.

Green bubble indicates significant over-indexing relative to incidence in population

Red bubble indicates significant under-indexing relative to incidence in population

ELECTRICITY: Reflecting the age patterns, the commitment segments also differ by home tenure. Home owners dominate the Attainers and Advocates, while renters are more common among the less committed segments.

PROFILE OF ELECTRICITY SEGMENTS BY OTHER DEMOGRAPHICS



Bases: Electricity consumers.

Green bubble indicates significant over-indexing relative to incidence in population
Red bubble indicates significant under-indexing relative to incidence in population

GAS: The age patterns we saw for electricity users are also evident with gas users. Older consumers are prevalent in more committed segments, whereas younger consumers dominate the less committed segments. Advocates are skewed toward women, whereas Followers are skewed towards men.

PROFILE OF GAS SEGMENTS BY GENDER AND AGE

Percentages represent incidence of demographic groups in population segment, e.g. read as 60% of Followers are men.		All gas consumers	Denial/Difficult	Followers	Flustered	Attainers	Advocates
GENDER	Male	50%	48%	60%	50%	50%	43%
	Female	50%	52%	40%	50%	50%	57%
AGE	18 to 39	35%	63%	55%	41%	24%	21%
	40 to 59	39%	34%	35%	40%	42%	40%
	60+	26%	3%	10%	19%	34%	40%

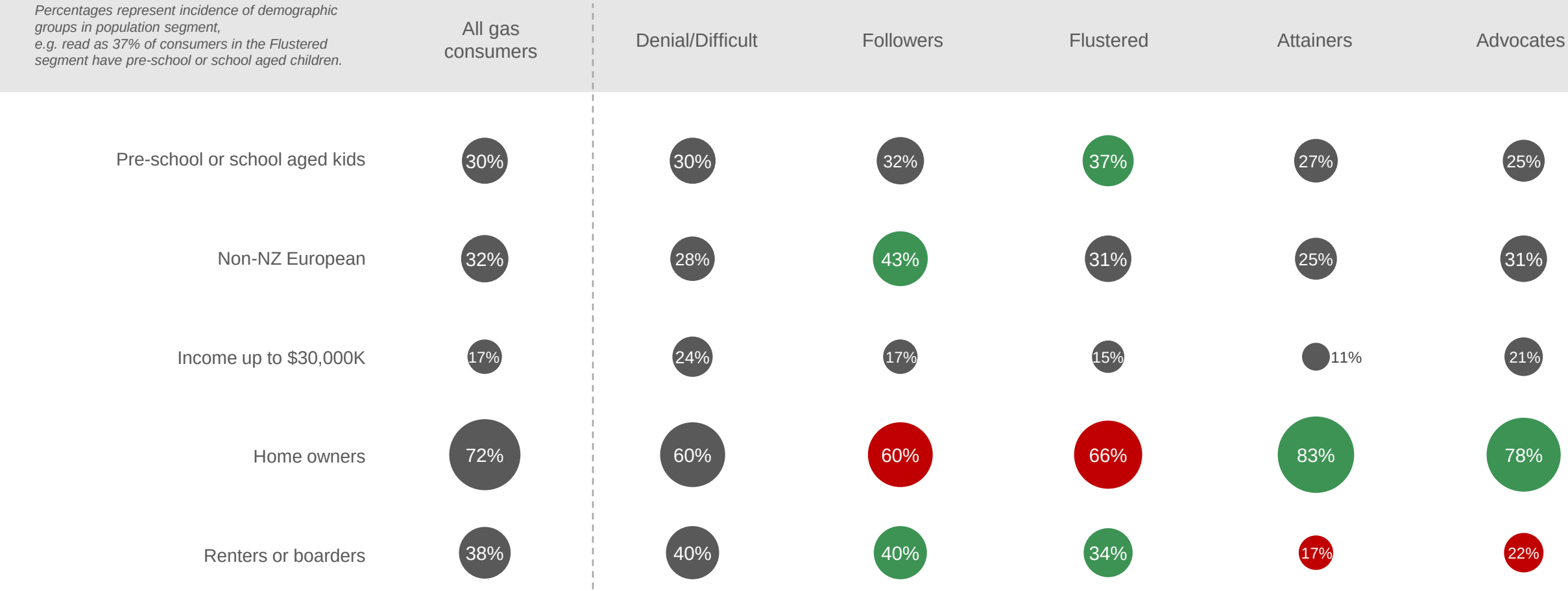
Bases: Gas consumers.

Green bubble indicates significant over-indexing relative to incidence in population
Red bubble indicates significant under-indexing relative to incidence in population

GAS: Renters are more common in the uncommitted groups. Followers have a high proportion of non-NZ European ethnic groups. And the Flustered have a high proportion of consumers with children.

PROFILE OF GAS SEGMENTS BY OTHER DEMOGRAPHICS

Percentages represent incidence of demographic groups in population segment, e.g. read as 37% of consumers in the Flustered segment have pre-school or school aged children.



Bases: Gas consumers.

Green bubble indicates significant over-indexing relative to incidence in population

Red bubble indicates significant under-indexing relative to incidence in population

In summary: A picture of our behavioural challenges begins to emerge

GAS	Denial/Difficult	Followers	Flustered	Attainers	Advocates
Profile	Younger, over-indexed on renters.	Younger, skewed to male. Over-indexed on non- NZ European and renters.	Young to middle aged. Over-indexed on families, some renters.	Older, homeowners	Older, homeowners.
Key behaviour gaps	Don't do any regular maintenance. Take risks unwittingly with gas appliances. 3 times more likely to have gas incidents than average.	Don't do any regular maintenance. Take risks unwittingly with gas appliances.	Don't do any regular maintenance. Take risks unwittingly with gas appliances.	Do some regular maintenance, but not much.	Do some regular maintenance, but not much.
ELECTRICITY	**Denial/Difficult**	**Followers**	**Flustered**	**Attainers**	**Advocates**
Electricity	Younger, lower income, renters.	Younger, skewed to male. Over-indexed on non NZ European, renters.	Younger to middle aged. Over-indexed on families, non NZ European, renters.	Older, homeowners.	Older, homeowners, lower income (retired).
Key behaviour gaps	Get shocks from wirings and fittings and may not take action. Overuse extension cords and multiplugs*. May misuse or use faulty appliances*.	Overuse extension cords and multiplugs. May misuse or use faulty appliances.	Get shocks from wirings and fittings and may not take action. May misuse or use faulty appliances.	May misuse or use faulty appliances.	May misuse or use faulty appliances.

Caution: small sample size.

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What drives behaviour and how can we change it?

In this section, we explore the System 1 and System 2 influencers of behaviour change, and assess which of these have the most potential to strengthen commitment to the safe use of gas and electricity.

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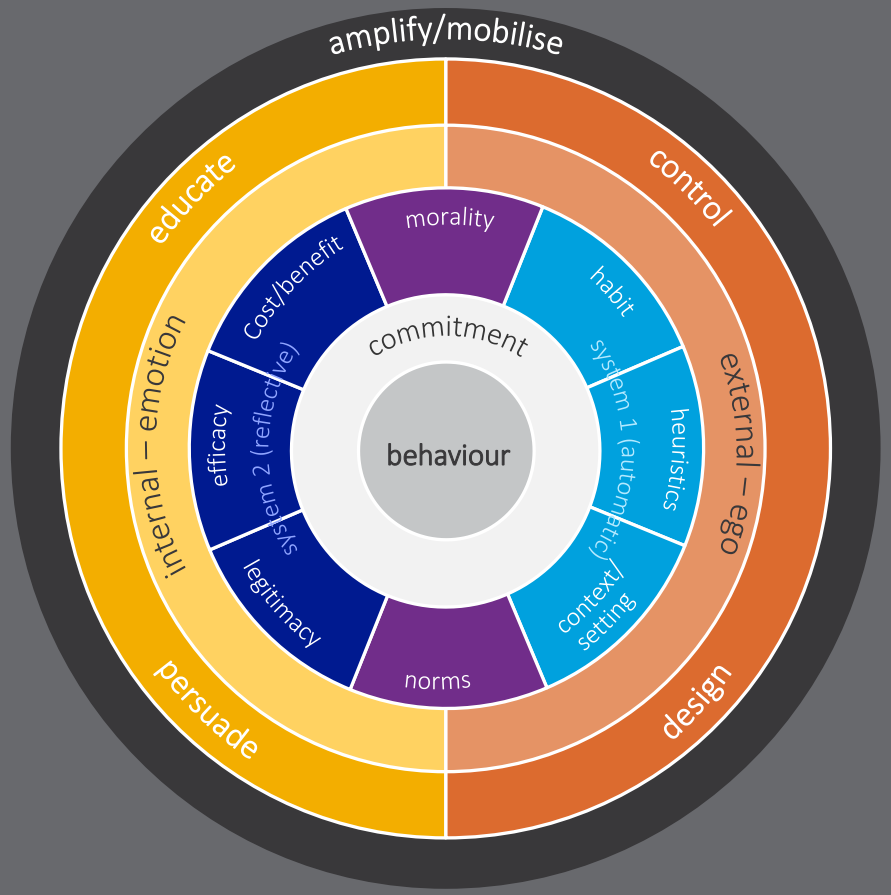
Kantar Public Behaviour web

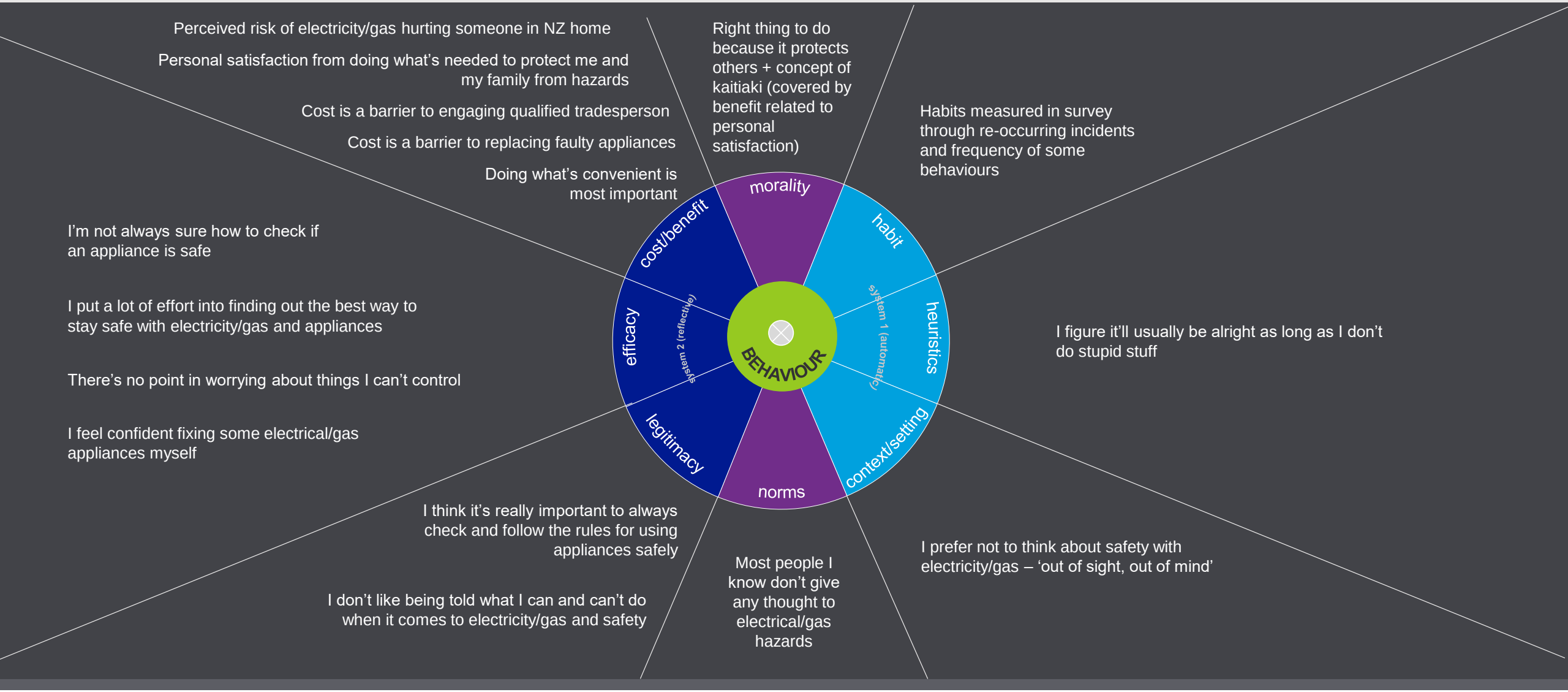


As we saw earlier, knowledge isn't enough for consumers to act safely. We need to understand the full range of behavioural influences to find insights into how we might change their behaviour.

Using our behaviour model, this research comprehensively assessed the attitudinal and circumstantial landscapes (highlighted in blue/purple in the diagram) at play.

On the following pages, we examine the core beliefs, attitudes, norms, heuristics, habitual, and environmental factors that serve to drive or deter the safe use of gas and electricity.

Overview of drivers: Following the qualitative learnings, the survey investigated a range of different behavioural influences

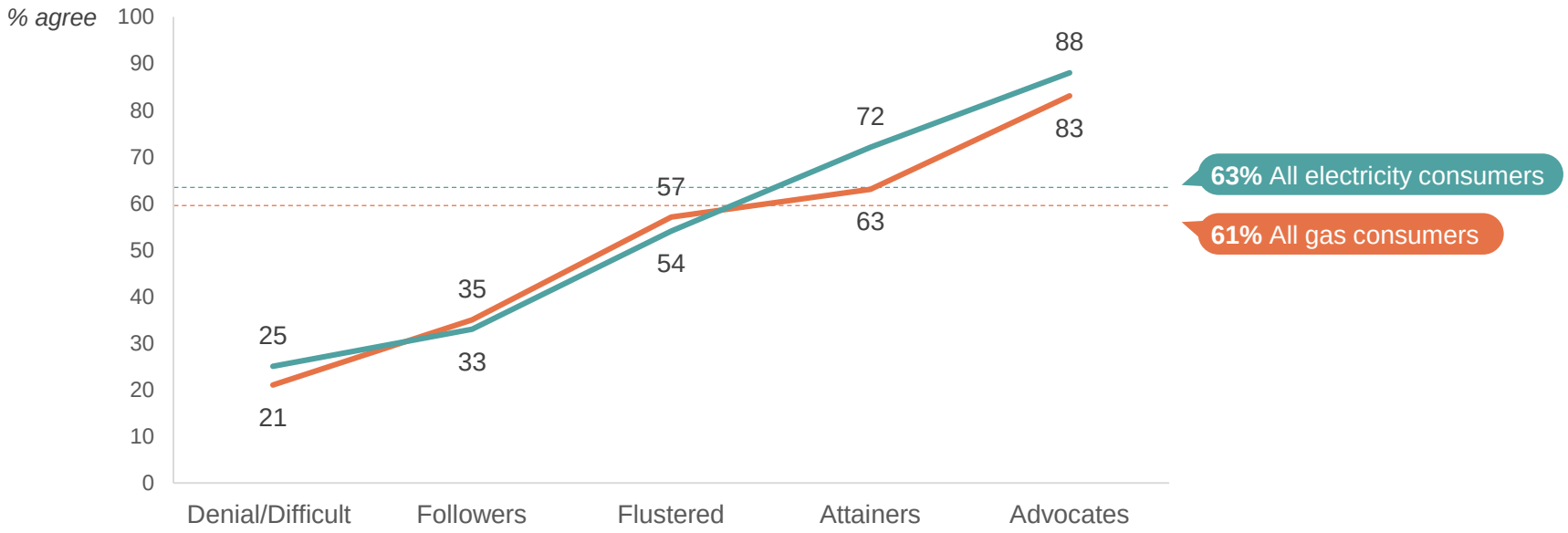


Uncommitted segments do not get a great amount of satisfaction from protection from hazards. The flustered segment are somewhat more satisfied, potentially as this group has more families with young children.

BENEFIT

A key benefit of adopting or maintaining safe behaviour relates to a sense of personal satisfaction in doing what's needed to protect a consumer and their family. The qualitative research highlighted a shift in language from safety to protection as consumers commit more strongly to using electricity and gas safely.

I get a great deal of personal satisfaction from doing what's needed to protect me (and my family) from electrical/gas hazards



"I've got nieces who are 4 and 5. If they're coming around, we will make sure that things that are within easy reach that could harm them is out of the harm's way."

"My daughter loves baking and doing pancakes and stuff, so we always had to be vigilant and show her how to do things and talk about the risks with her."

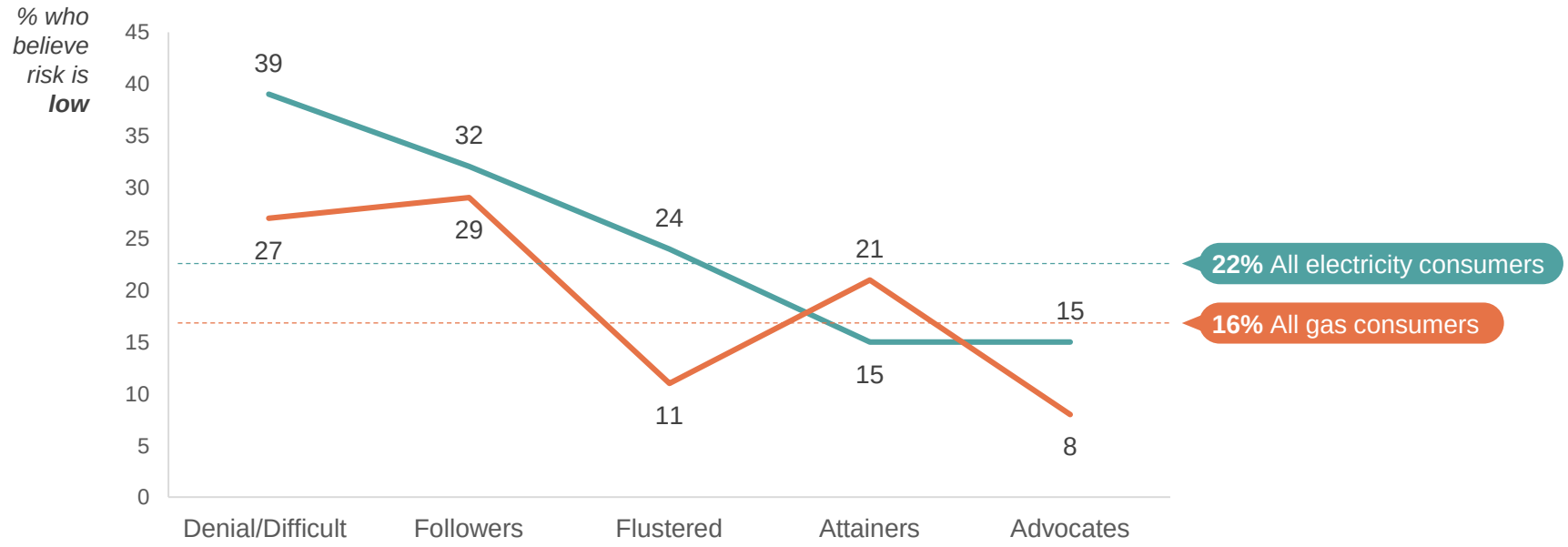
Bases: All electricity consumers (1,107), all gas consumers (789)
Source: Q9b, Q11, Q20 & Q23. "*How much do you agree or disagree that …*" A scale of 'strong agree, agree, neither agree nor disagree, disagree and strongly disagree' was used. The chart only shows the proportions who agreed or strongly agreed with the statements.

Safety behaviour is correlated with perceived risk. Deniers and followers perceive risks to be low. Flustered feel a greater degree of risk yet are not currently acting on it.

PERCEIVED RISK OF ELECTRICITY HURTING SOMEONE IN A NEW ZEALAND HOME

To fully understand the benefits associated with a behaviour, we need to understand consumers' perceived susceptibility to the threat posed if they don't perform the behaviour. Consumers are strongly influenced by stories and events – these may be personal experience, intergenerational lore, or urban myth. There is also wide variation in what people perceive to be the potential consequences of unsafe behaviour from 'shorting out' a fuse box to death. Consumers express greater discomfort if the unsafe behaviour has the potential to cause personal harm, e.g. personal health vs property damage.

Perceived risk of electricity/gas hurting someone in NZ home



"I'm never too worried. I know it's not good, but it's usually not something life threatening."

"I'm not interested in having a go at fixing it [appliance fault] if I'm unsure about it or if it puts my life at risk."

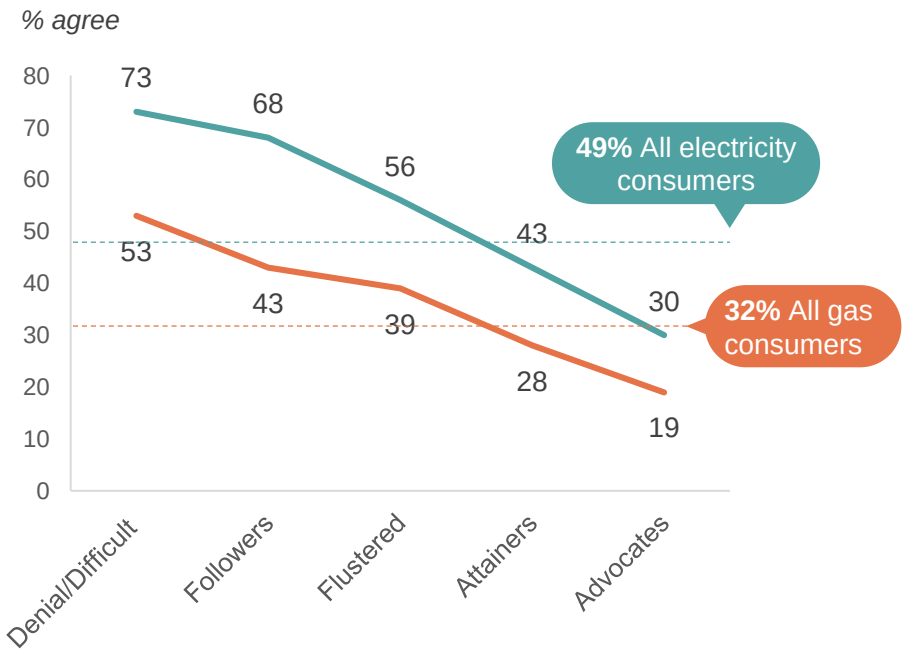
Base: All respondents (1,107)
Source: Q10 & Q22. *"How do you rate the **risk** that (electricity/gas), or (electrical/gas) appliances, **can** hurt someone in a New Zealand home?"* A scale of 'extremely low, very low, low, quite high, high, very high' was used. The chart only shows the proportions who responded with on of the three 'low' categories.

Cost is a barrier to engaging qualified tradespeople (for up to half of consumers) and replacing faulty items, particularly for uncommitted segments.

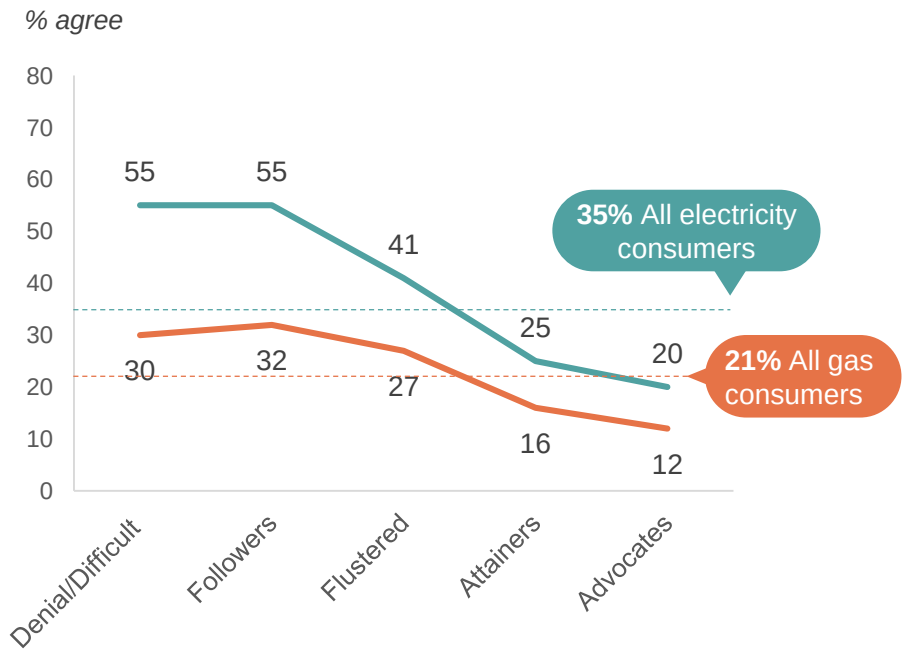
COSTS

Consumers make direct cost-benefit comparisons – the dollar cost of engaging a qualified tradesperson, or getting a faulty appliance repaired, versus safety.

Cost sometimes stops me from getting an electrician/gas fitter/qualified tradesperson in straightaway



Cost sometimes stops me from replacing faulty electrical/gas appliances



"I want to make sure there's enough things to warrant calling an electrician out."

"We're working our way through the house… There aren't enough power points on the wall and it would be too expensive to get an electrician around to put them in. But, when we do get an electrician around, then we do upgrade everything."

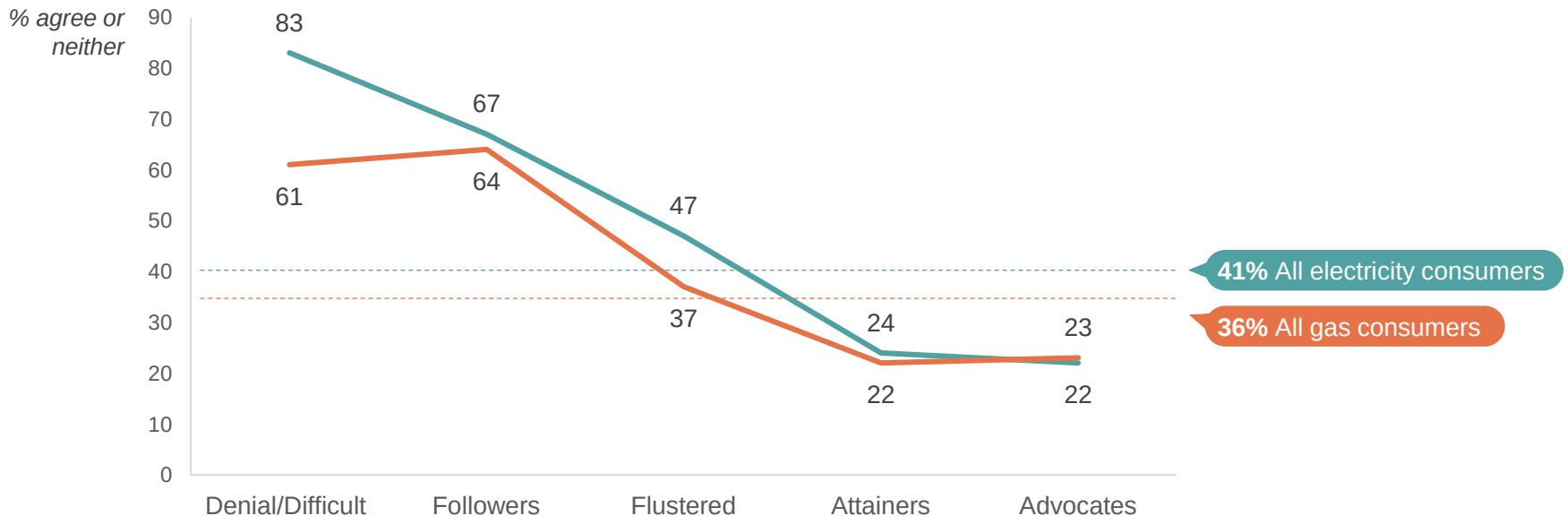
Bases: All electricity consumers (1,107), all gas consumers (789)
Source: Q9a & Q20. *"How much do you agree or disagree that …"* A scale of 'strong agree, agree, neither agree nor disagree, disagree and strongly disagree' was used. The chart only shows the proportions who agreed or strongly agreed with the statements.

Less committed segments prioritise convenience (both time as well as money) over safety.

COSTS

Costs relates not just to financial cost, but what the consumer will lose out on if they perform the desired behaviour, e.g. time spent on other things. As we'll see later in the report, prioritising convenience over safety is a strong predictor of lack of commitment.

If I'm honest, doing what's most convenient to me (and my family) is more important than spending time and money checking electrical/gas appliances are safe



"We leave appliances plugged in. It's just the convenience – the toaster is being used every single day, the kettle is being used three or four times a day. How cumbersome is that to have to plug, unplug, plug, unplug."

"I don't look at everything only from the safety issue. I look at it from the convenience, from the time, from the 'is it in my ability to be able to do it'. I don't let it consume me. There are a whole lot of other factors that govern how I live as well to make it a comfortable existence."

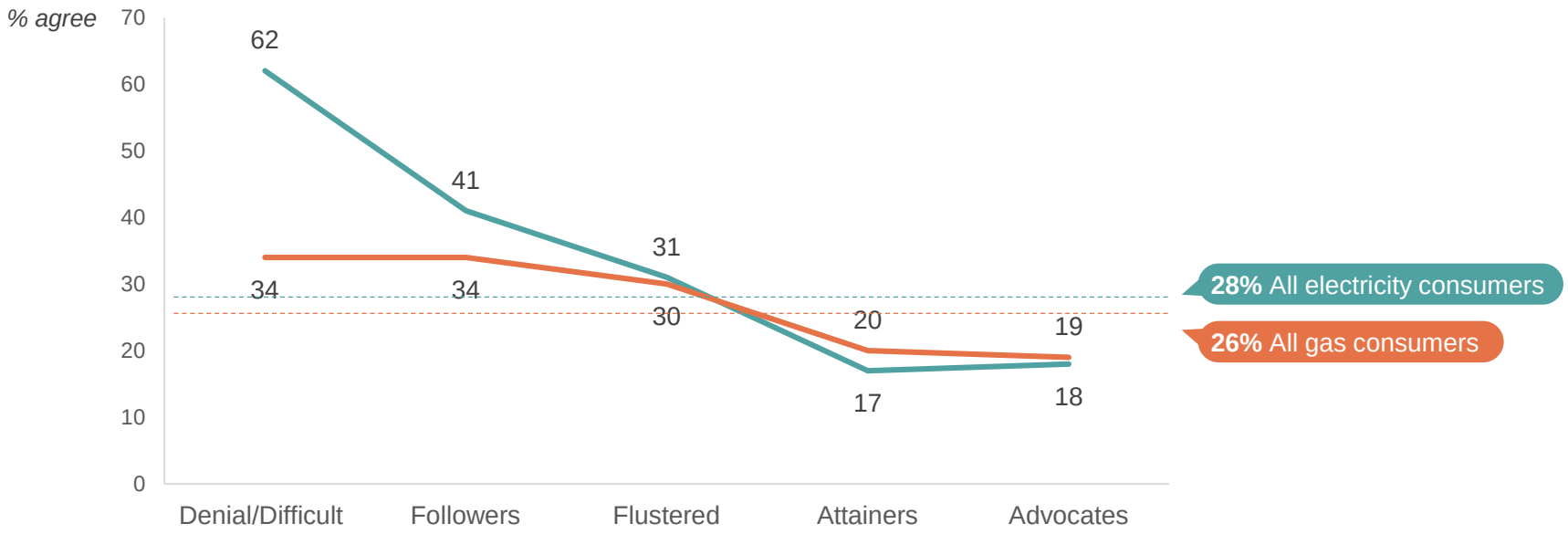
Bases: All electricity consumers (1,107), all gas consumers (789)
Source: Q9b & Q21. "*How much do you agree or disagree that …*" A scale of 'strong agree, agree, neither agree nor disagree, disagree and strongly disagree' was used. Because this statement is a less socially acceptable statement to agree with, the chart shows those who didn't disagree (i.e. agreed or said neither). Looking at the data in this way much more effectively shows the differences between the commitment segments.

Around a quarter of consumers are influenced by negative social norms. For the two most uncommitted segments, these are somewhat higher for electricity than gas.

NORMS

Norms relate to the degree to which other people are performing a behaviour of have adopted a value.

Most people I know don't give any thought to electrical/gas hazards



"Might get a flack from friends for being a bit straight or OTT. Others would think 'yes, be aware of safety but don't need to have strong focus, just get on with it'."

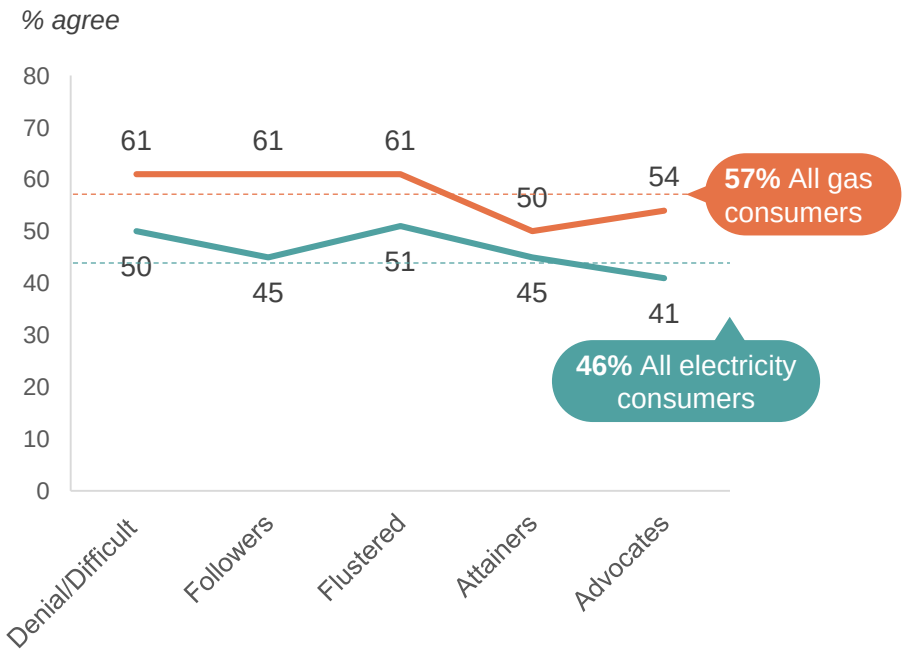
Bases: All electricity consumers (1,107), all gas consumers (789)
Source: Q9b & Q21. *"How much do you agree or disagree that …"* A scale of 'strong agree, agree, neither agree nor disagree, disagree and strongly disagree' was used.

Around half of consumers don't know how to check if an electricity or gas appliance is safe, but committed groups take more effort to finding out what to do.

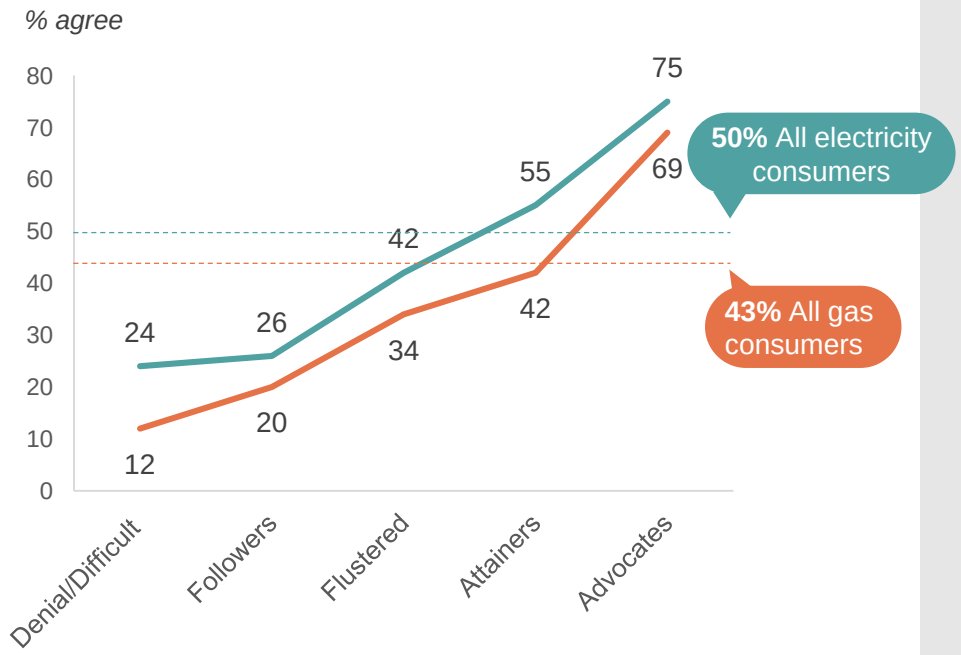
EFFICACY

Efficacy relates to the degree to which a consumer feels they have the capability and capacity to change their behaviour. Loosely, around half of electricity users and gas users don't know how to check if an appliance is safe. However, this isn't necessarily for lack of effort. Relatively few feel confident in fixing appliances themselves (especially gas appliances).

I'm not always sure how to check if an electrical/gas appliance is safe myself



I put a lot of effort into finding out the best way to stay safe with electricity/gas and electrical/gas appliances



"We used lots of multiplugs because we live in an old house. I don't check them. I wouldn't know how you'd check them… I just replace them if they stop working."

"I probably wouldn't know what I'm looking for with gas leaks, if I was to be honest."

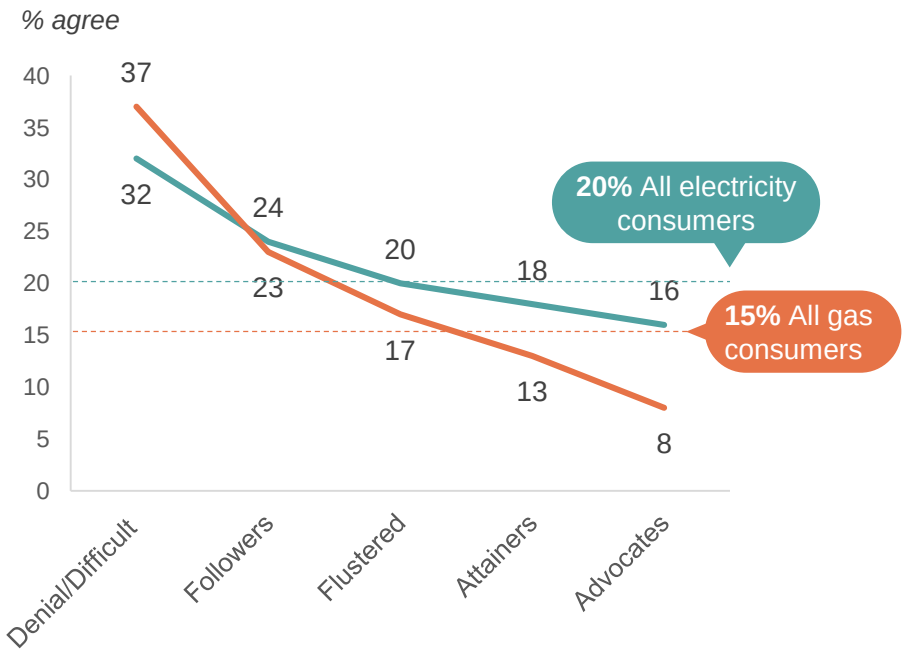
Bases: All electricity consumers (1,107), all gas consumers (789)
Source: Q9a, Q11, Q20 & Q23. "*How much do you agree or disagree that …*" A scale of strong agree, agree, neither agree nor disagree, disagree and strongly disagree was used. The chart only shows the proportions who agreed or strongly agreed with the statements.

For less committed groups, safety with electricity and gas is something they perceive they can't control. Nearly a third of gas consumers in the Denial/Difficult segment feel confident fixing gas appliances themselves.

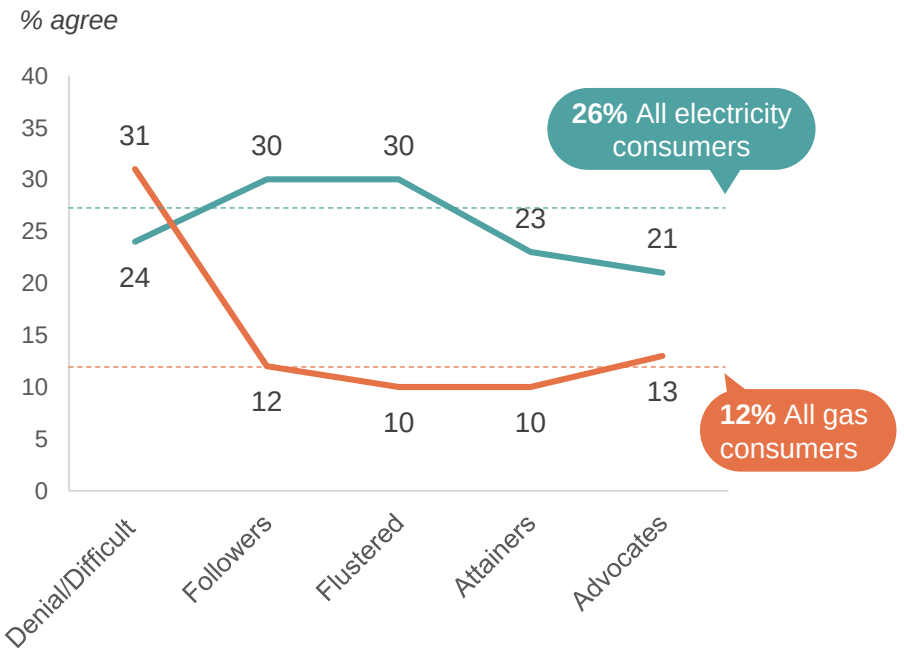
EFFICACY

Other aspects of efficacy relate to a belief that doing something to keep safe is within your control.

When it comes to safety with electricity/gas, there's no point in worrying about things I can't control



I feel confident fixing some electrical/gas appliances myself



> *"Don't worry about things you can't control. If it's going to happen, it's going to happen. You've got more chance of being hit by a bus or eaten by a shark."*
>
> *"I wouldn't trust myself… I leave it to the experts."*

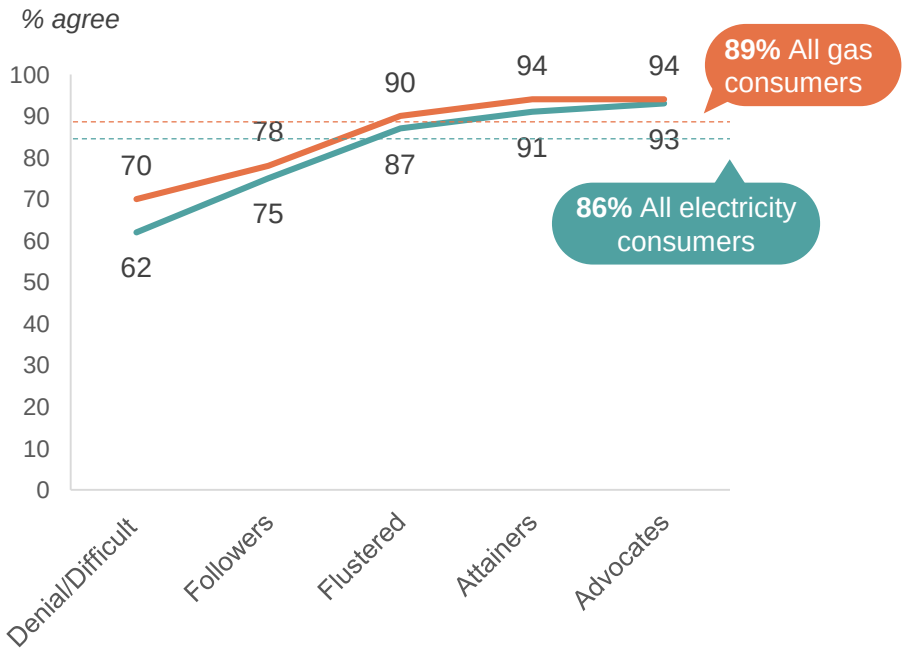
Bases: All electricity consumers (1,107), all gas consumers (789)
Source: Q9b, Q11, Q20 & Q23. "*How much do you agree or disagree that …*" A scale of strong agree, agree, neither agree nor disagree, disagree and strongly disagree was used. The chart only shows the proportions who agreed or strongly agreed with the statements.

Most consumers acknowledge the importance of following safety rule, however uncommitted groups are less likely to want them thrust upon them.

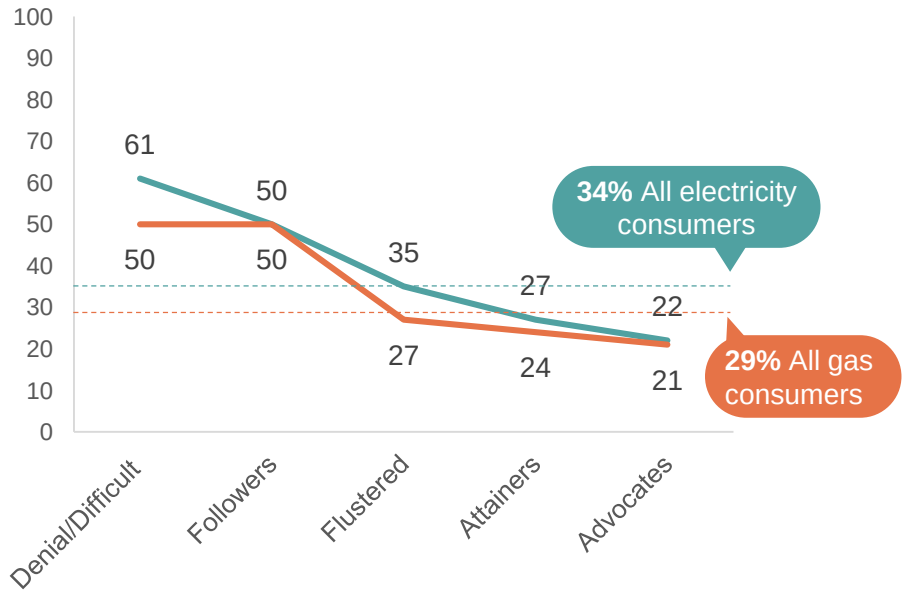
LEGITIMACY

Legitimacy relates to faith based in the premise that there is a need for rules around safety with electricity and gas. Two aspects were measured – the acceptance of rules and objection at being told what to do.

I think it's really important to always check and follow the rules for using electrical/Gas appliances safely



I don't like being told what I can and can't do when it comes to electricity/gas and safety



"People who sit behind a desk and tell you what you can and can't do [is frustrating]. Rules are always changing anyway."

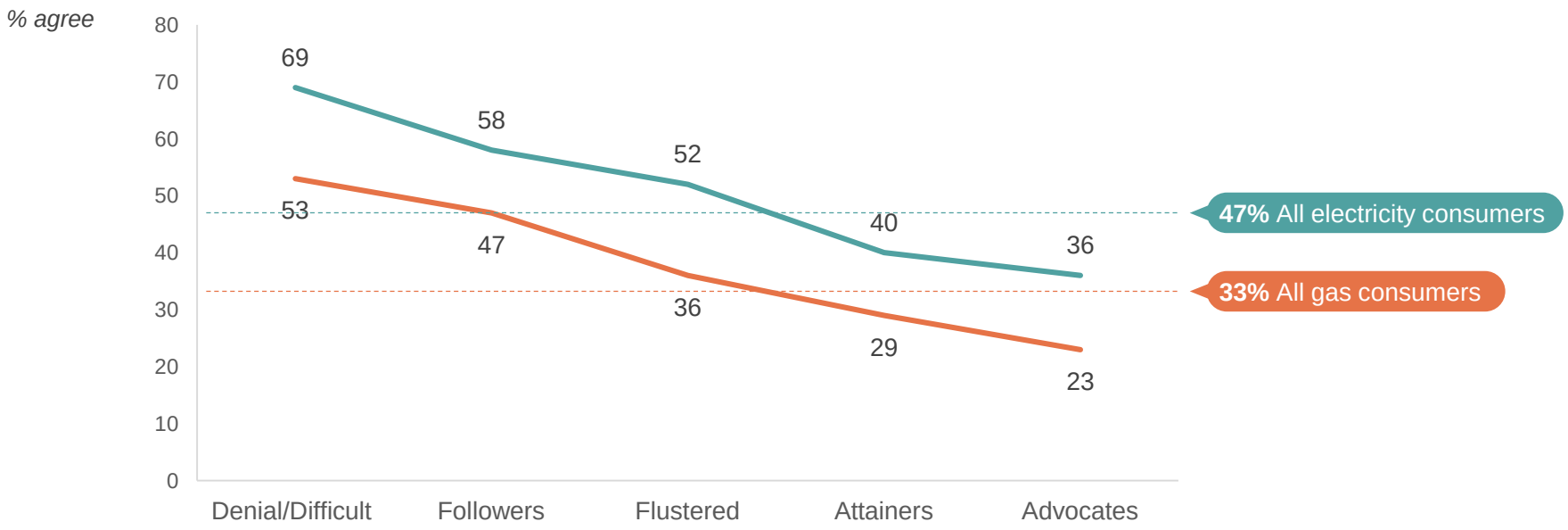
Bases: All electricity consumers (1,107), all gas consumers (789)
Source: Q9b & Q21. "*How much do you agree or disagree that …*" Note, the second statement (don't like being told what I can and can't do) is a less socially acceptable statement to agree with. We have therefore charted those who didn't disagree (i.e. agreed or said neither). Looking at the data in this way much more effectively shows the differences between the commitment segments.

For less committed groups, they reckon they will be alright if they are not being stupid. More committed groups know that it takes more than that.

HEURISTICS

Heuristics include mental short-cuts and the conditioning or priming of consumer behaviour. Consumers do things, or don't do things, without even thinking about it. A key heuristic associated with risk-taking around electricity and gas is consumers' belief that they'll stay safe as long as they use their common sense, or don't do anything stupid. The regular use of electricity and gas appliances or equipment without issue breeds complacency, and reinforces this heuristic as well as the availability heuristic (examples that quickly come to mind).

With electricity/gas, I figure it'll usually be alright as long as I don't do stupid stuff



"I probably know deep down I should be going 'hang on is the [BBQ] connection okay?'. It's just being complacent, it's going 'nah that will be fine, she'll be right' – the barbecue worked last time."

"If you've done it before you go 'it's sweet, it will be fine'."

"It's just common sense things that you should do. I just don't do it because it seems minor to me."

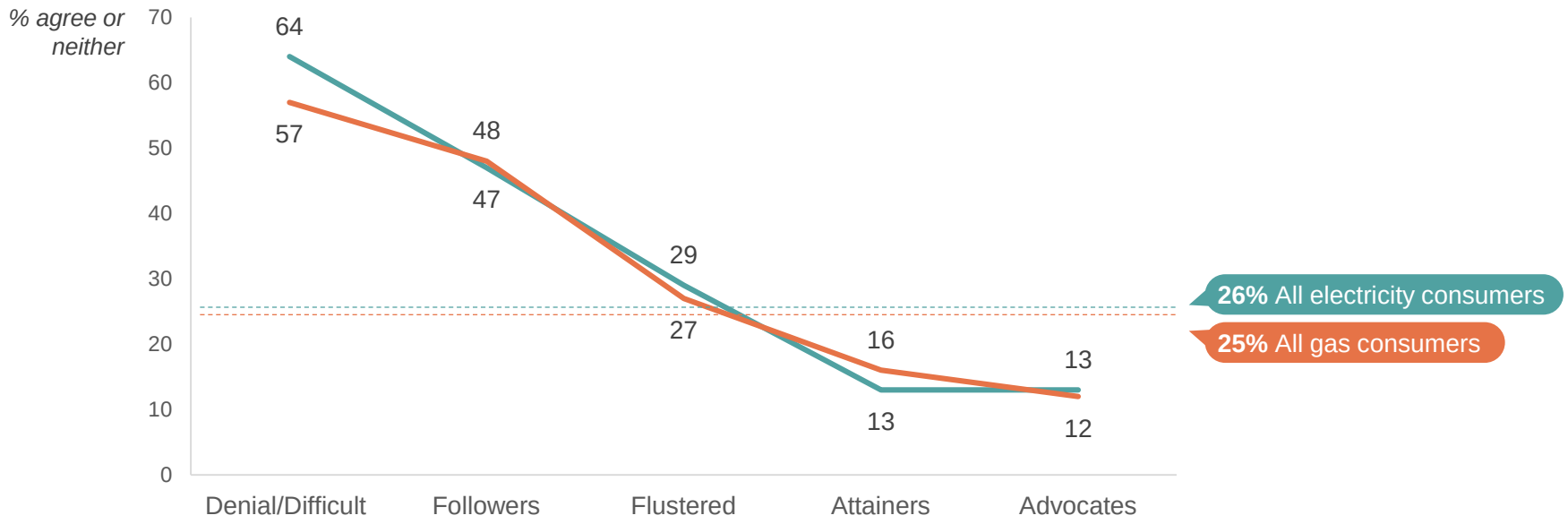
Bases: All electricity consumers (1,107), all gas consumers (789)
Source: Q9b & Q21. "*How much do you agree or disagree that …*" A scale of strong agree, agree, neither agree nor disagree, disagree and strongly disagree was used. The chart only shows the proportions who agreed or strongly agreed with the statement.

Likewise, less committed groups just prefer not to think about safety – out of sight, out of mind.

CONTEXT/SETTING AND HEURISTIC

When potential hazards are invisible, consumers may be blind to the risk of the hazard occurring – 'out of sight, out of mind'. This is also an attentional heuristic – consumers think something is less likely to happen if they can't see it.

I prefer not to think about safety with electricity/gas – 'out of sight, out of mind'

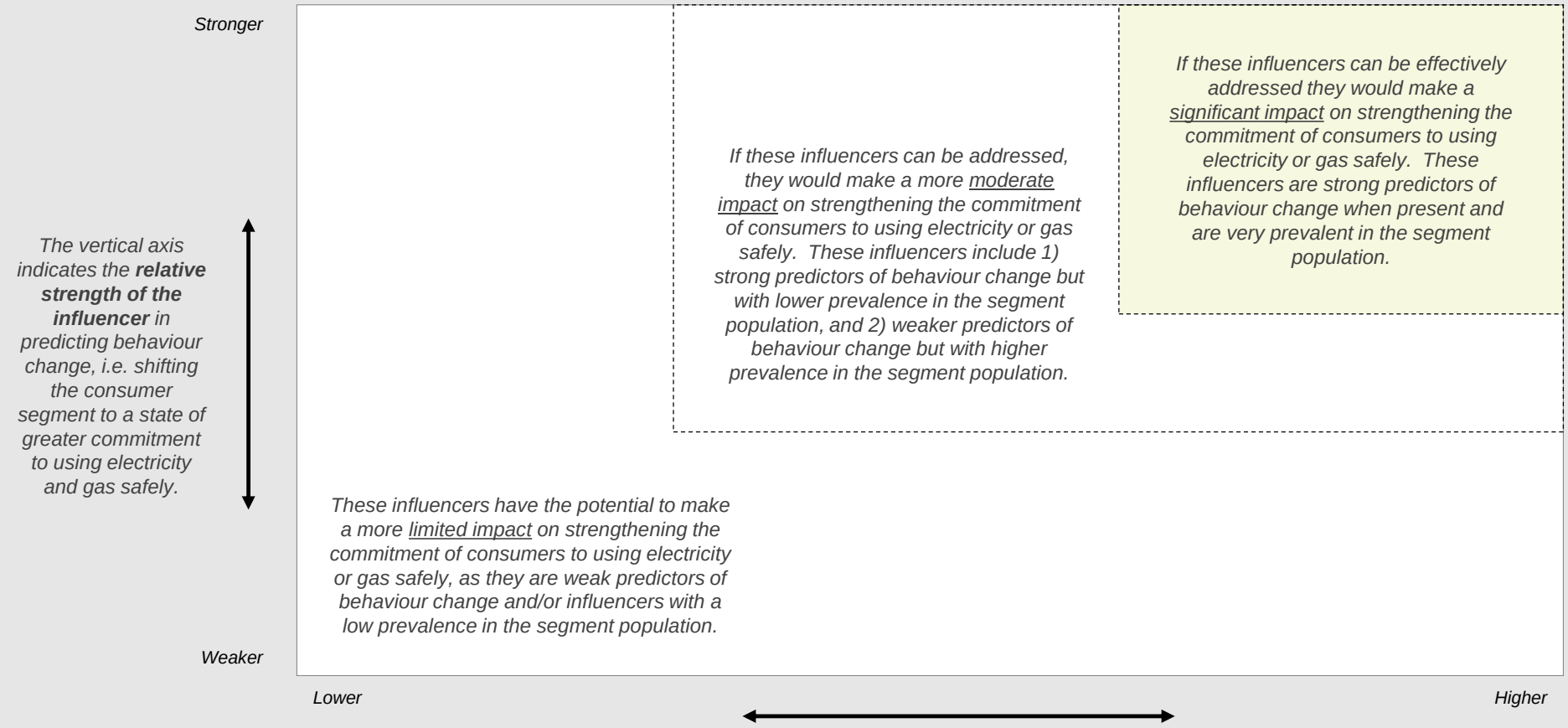


> *"It would probably be better to unplug it, but I can't really be bothered thinking about it."*

Bases: All electricity consumers (1,107), all gas consumers (789)
Source: Q9b & Q21. "*How much do you agree or disagree that …*" Note, this statement is a less socially acceptable statement to agree with. We have therefore charted those who didn't disagree (i.e. agreed or said neither). Looking at the data in this way much more effectively shows the differences between the commitment segments.

Next we present a series of charts that highlight the behavioural influencers that would have the most effect in increasing consumers' commitment to safe behaviour if the influencer can be effectively addressed. Below we provide an explanation of how to interpret these charts.

INTERPRETATION OF IMPACT CHARTS

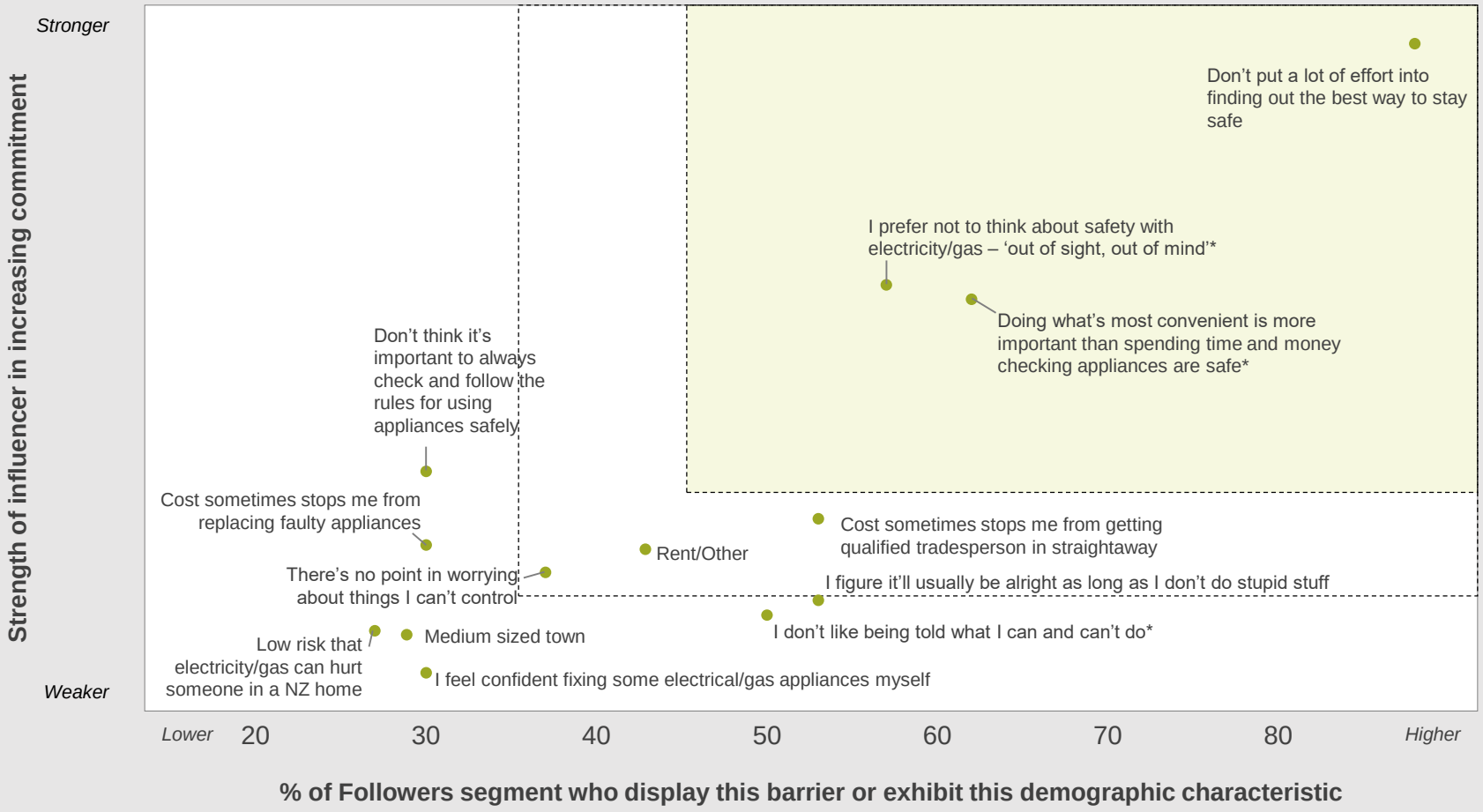


Additional notes on impact charts

- Both barriers and facilitators are mapped on the charts. However, so that these can be compared the incidence figures for drivers that facilitate safe behaviour have been reversed, i.e. we show the proportion of consumers who do not display this facilitator (in essence, the absence of a facilitator is acting as a barrier). For example, we show the proportion who do not think it is important to check and follow the safety rules.
- Where the lines are drawn inside the impact chart is subjective. It is the relative placement of the influencers that is most important.
- Linear discriminant analysis has been used to determine the relative strength of the influencers in predicting behaviour change. The strength of each influencer is determined by the F value which indicates each variable's statistical significance in the discrimination between segments. It is a measure of the extent to which a variable makes a unique contribution to the prediction of the segments.
- The impact charts only show those variables that the multi-variate analysis identified as influencing a shift in commitment. A number of the behavioural influencers and demographic variables covered in the survey are therefore not shown on the impact charts.
- The exception to the above point is the attribute '*I get a great deal of personal satisfaction from doing what's needed to protect me (and my family) from electrical/gas hazards'* . This was originally included in the analysis, but was found to be the primary predictor for all segments (except Flustered where it came in third) as it is highly correlated with commitment and was in effect acting as an outcome measure. By removing it from the modelling, we can better understand the impact of influencers that can be more practically and directly addressed to strengthen consumer commitment to using gas and electricity safely. Having said this, any initiatives that increase personal satisfaction would have a positive pay-off on commitment.

GAS: A lack of effort is an especially strong predictor of the Denial/Difficult using gas. We also need to overcome their 'out of sight, out of mind' attitude, and tendency to prioritise convenience over safety.

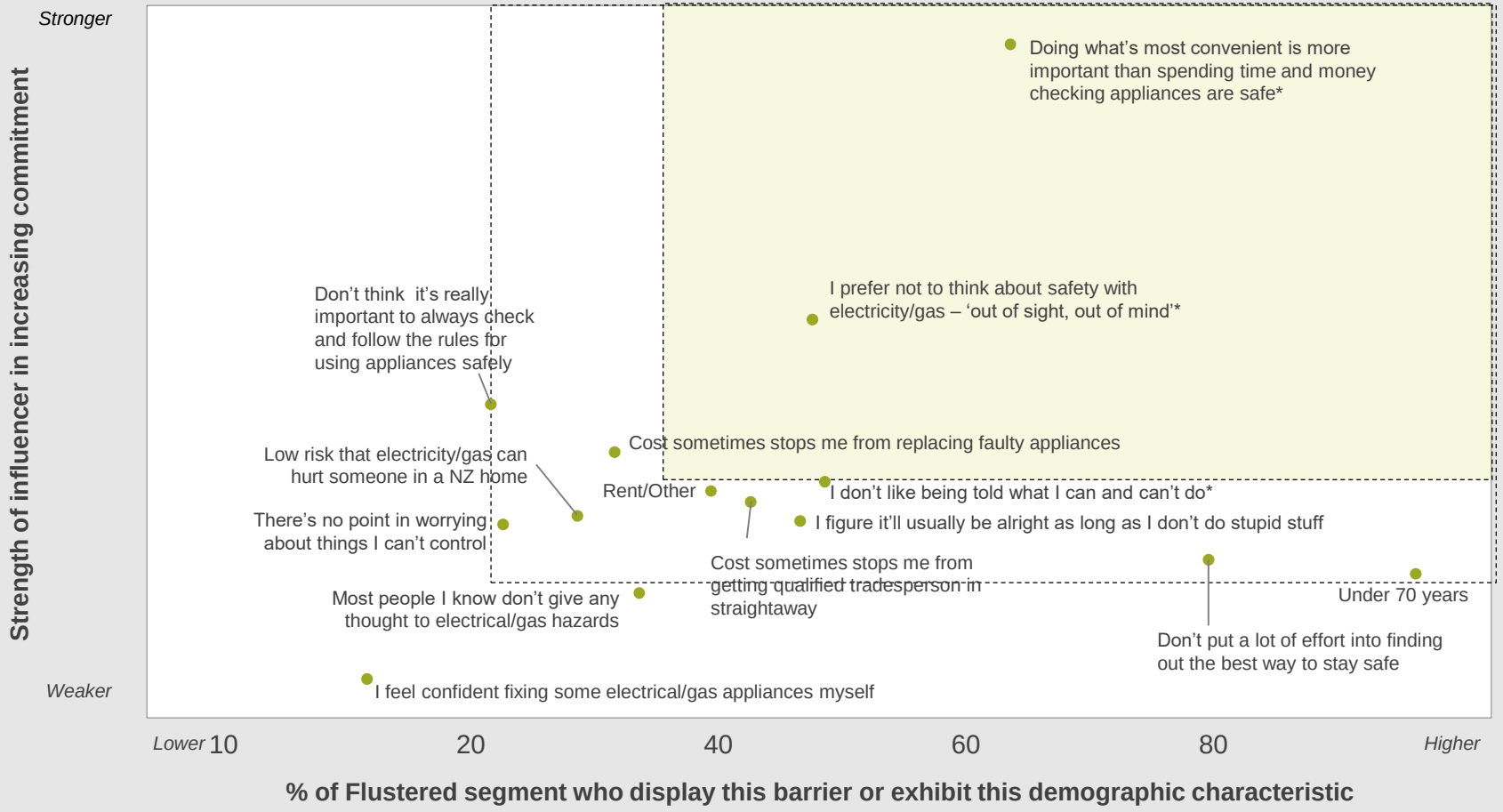
INFLUENCERS THAT DRIVE GREATER COMMITMENT FOR DENIAL/DIFFICULT (GAS)



Base: Gas consumers

GAS: Similar influences are at play in the Followers segment. Convenience is key, plus also the moderate influencers of a non-conformist attitude (‘don’t tell me what I can and can’t do’).

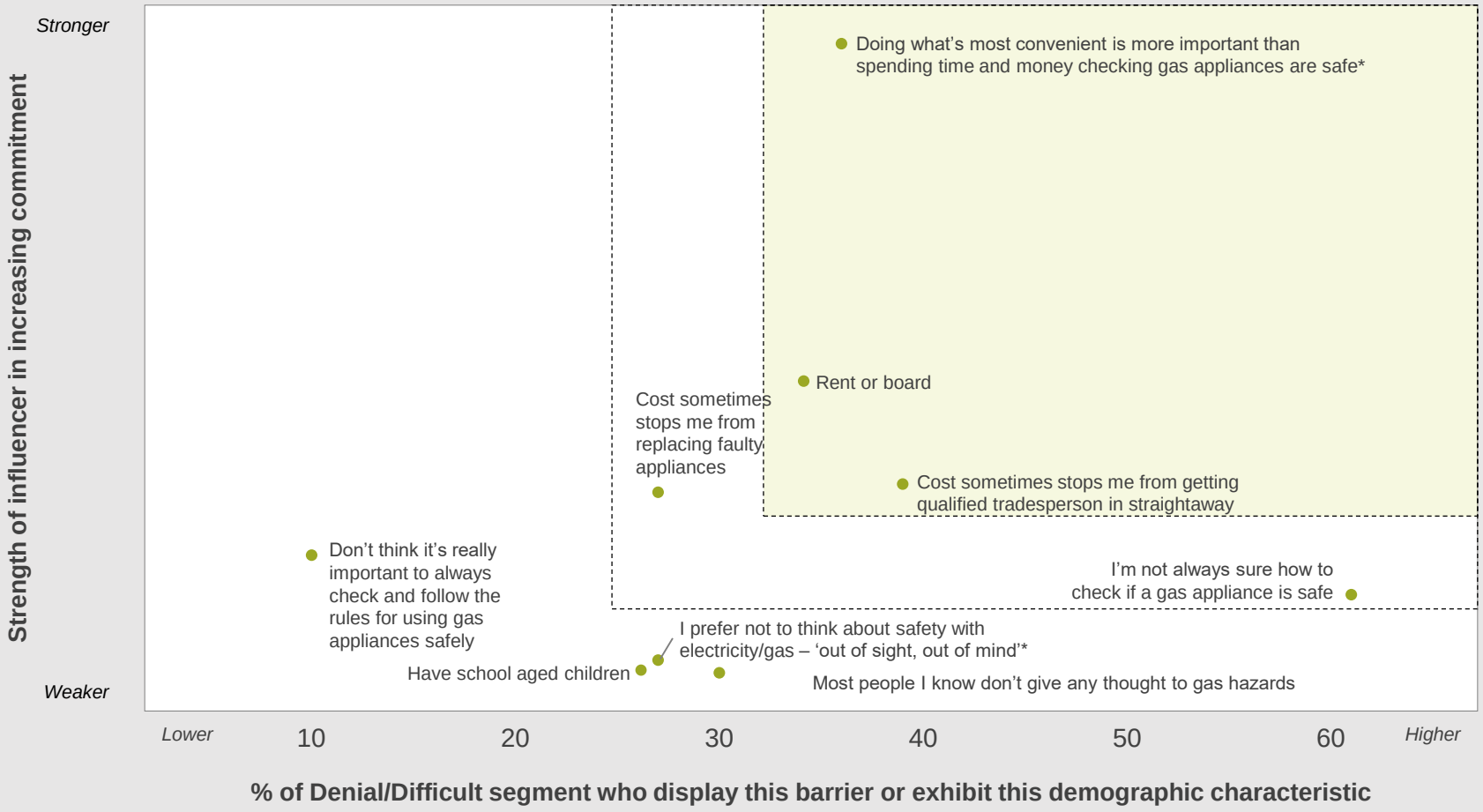
INFLUENCERS THAT DRIVE GREATER COMMITMENT FOR THE FOLLOWERS SEGMENT (GAS)



Base: Gas consumers

GAS: In order to change the Flustered segment, we have to overcome their prioritisation of convenience, bearing in mind that many are renters.

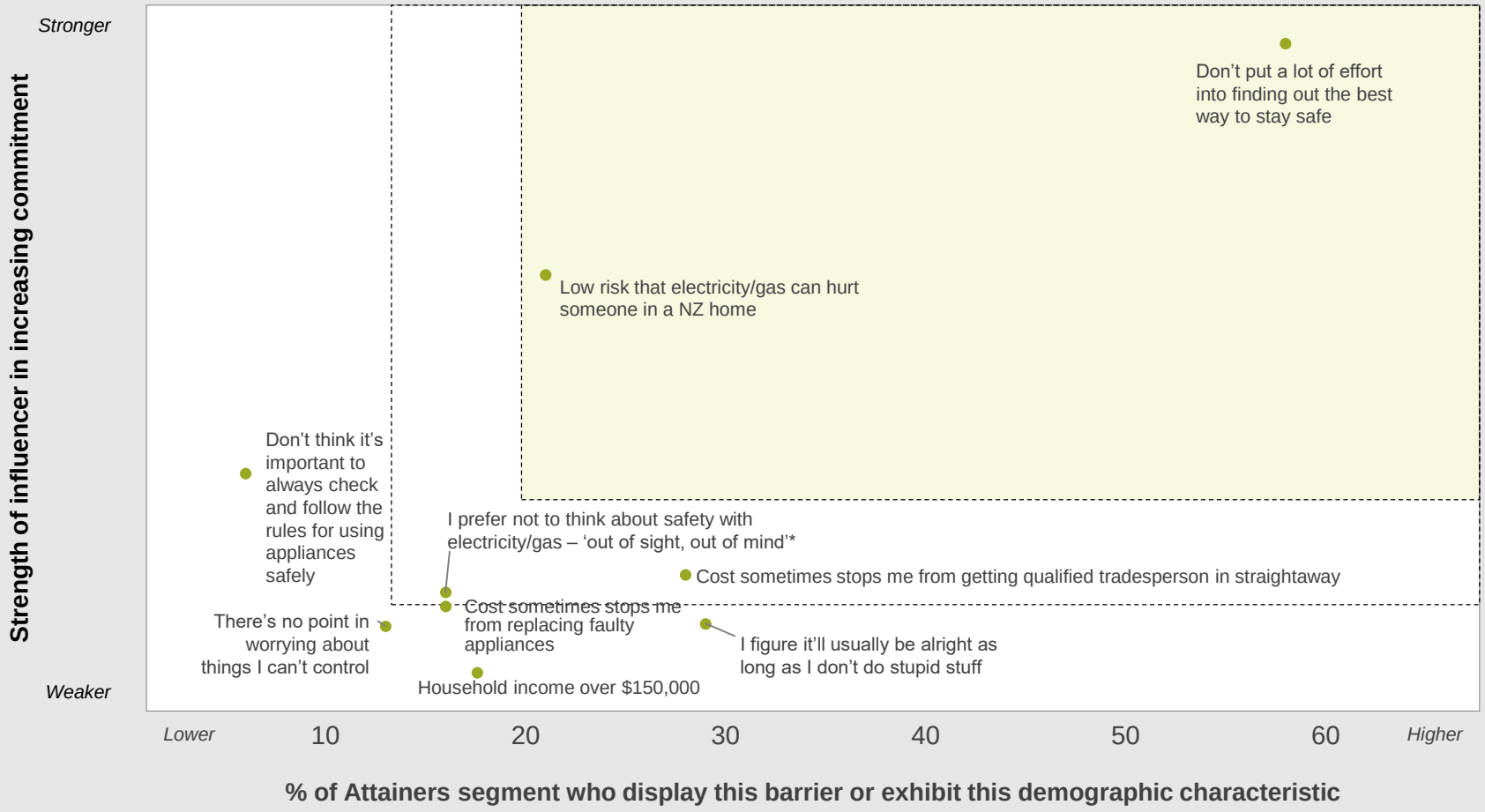
INFLUENCERS THAT DRIVE COMMITMENT FOR THE FLUSTERED SEGMENT (GAS)



Base: Gas consumers

GAS: Addressing the perception held by some Attainers that there is a low risk of harm may go some way to convincing Attainers of the pay-off from exerting more effort to protect themselves and their families, and strengthen Attainers' commitment to using gas safely.

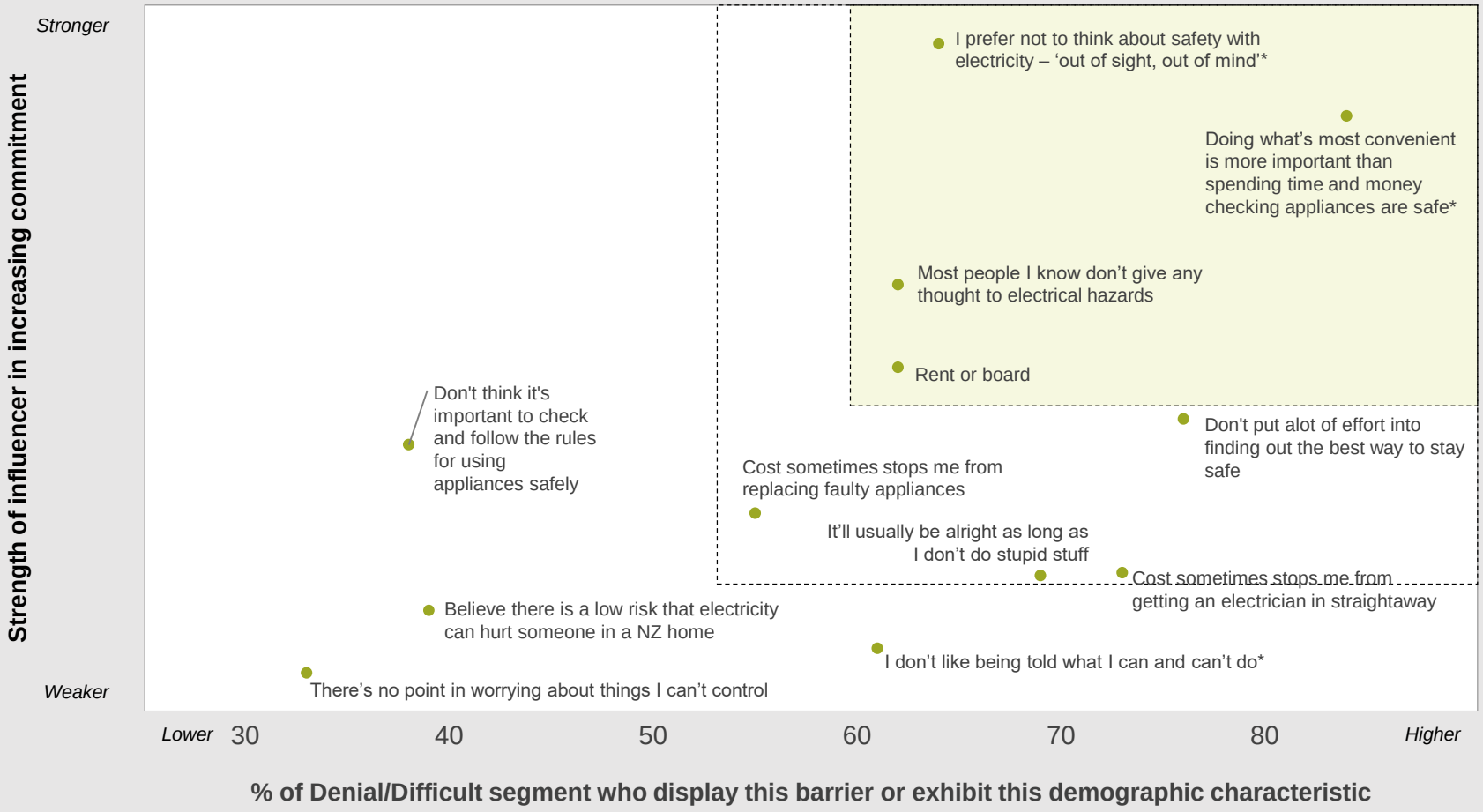
INFLUENCERS THAT DRIVE GREATER COMMITMENT FOR THE ATTAINERS (GAS)



Base: Gas consumers

ELECTRICITY: For electricity consumers in the Denial/Difficult segment, behaviour change will require addressing the 'out of sight, out of mind' heuristic, shifting the cost-benefit imbalance between convenience, time and money versus safety, as well as changing social norms. Interventions that help overcome the barriers that renters face could also be impactful.

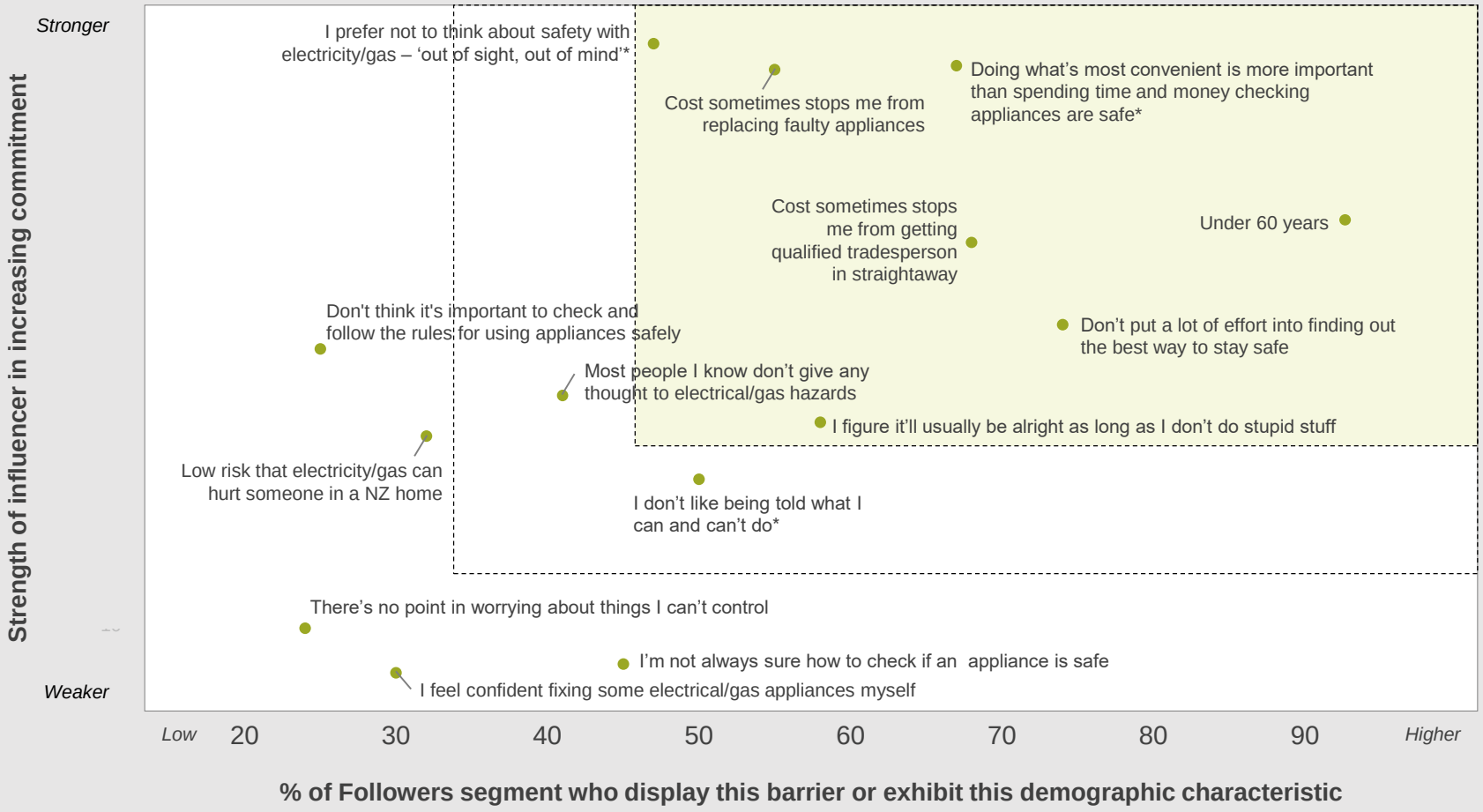
INFLUENCERS THAT DRIVE COMMITMENT FOR THE DENIAL/DIFFICULT SEGMENT (ELECTRICITY)



Base: Electricity consumers

ELECTRICITY: The influencers for Followers also emphasise convenience, with a measure of low effort and ‘she’ll be right’. We see that financial cost has a much stronger influence.

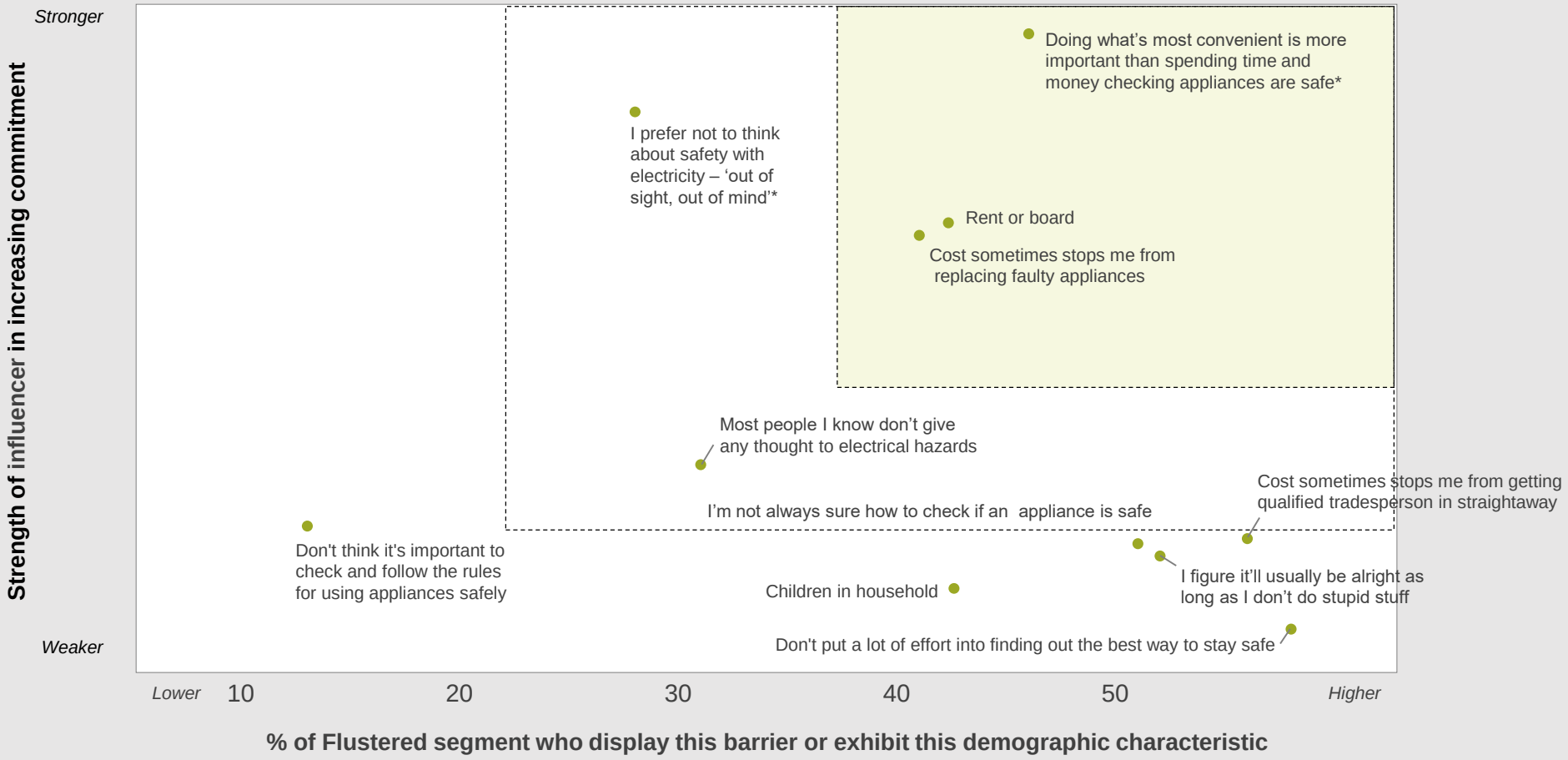
INFLUENCERS THAT DRIVE GREATER COMMITMENT FOR FOLLOWERS (ELECTRICITY)



Base: Electricity consumers

ELECTRICITY: Addressing financial and non-financial costs are the priority to addressing the Flustered's points of conflict. The rental environment also plays a key role in preventing change. And, although not highly prevalent among all consumers in this segment, the heuristic 'out of sight-out of mind' is a strong barrier to change for those it does affect.

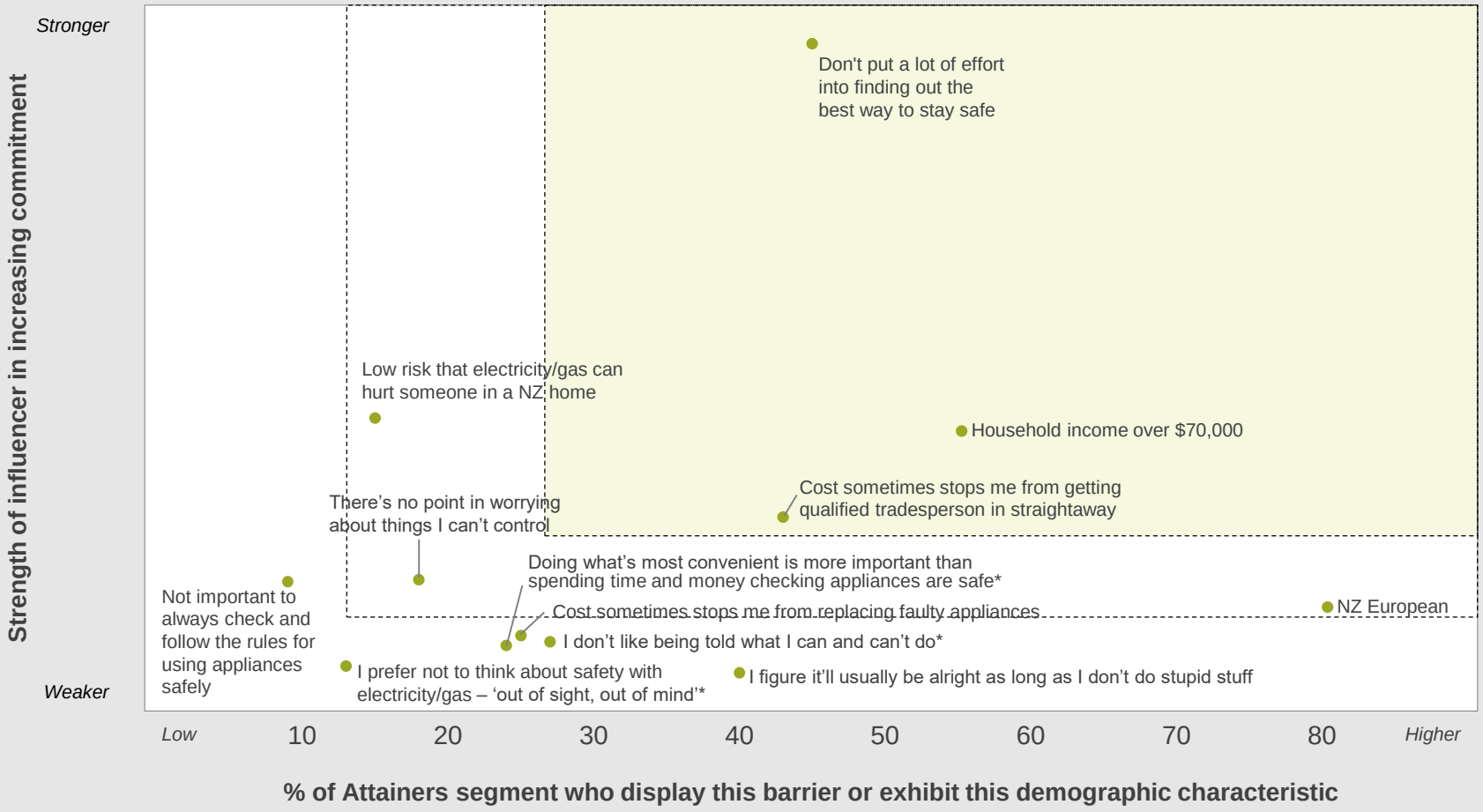
INFLUENCERS THAT DRIVE GREATER COMMITMENT FOR THE FLUSTERED SEGMENT (ELECTRICITY)



Base: Electricity consumers

ELECTRICITY: The biggest factor that differentiates Attainers from Advocates is the amount of effort that Advocates put into staying safe with electricity. Income appears to play a role for Attainers – related to this rebalancing the cost-benefit equation that is weighted towards the financial cost of engaging an electrician would strengthen commitment to using electricity safely. The perceived risk of being harmed also comes into the mix.

INFLUENCERS THAT DRIVE GREATER COMMITMENT FOR THE ATTAINERS (ELECTRICITY)



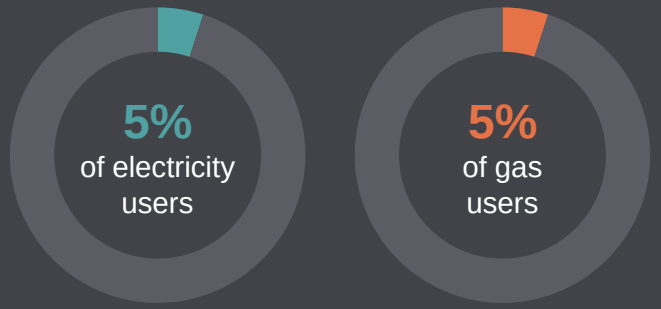
Base: Electricity consumers

COLMAR BRUNTON
A Kantar Public Company

Bringing it together – segment profiles and pathways to change

WORKSAFE
NEW ZEALAND | MAHI HAUMARU AOTEAROA

Denial/Difficult



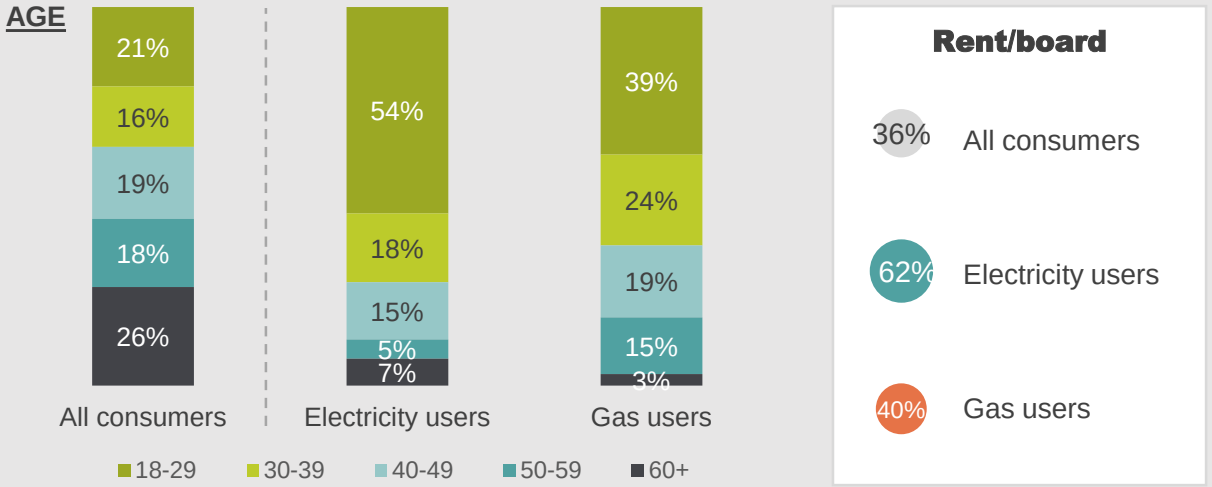
These consumers don't acknowledge that the issue of using gas and electricity is something that should be taken seriously.

- The risk is slim so they don't pay attention.
- Relaxed approach.
- They don't do stupid stuff, others do.
- Low awareness or consideration or rules and regulations.
- Naïve, which drives low self-efficacy.
- In some settings, defer responsibility to others.
- A handful of consumers in this segment are 'difficult' – they relish non-conformity and actively resist change.

"These are just things that I just completely overlook because I'm usually not paying that much attention to the small things around the house. There's a lot of things I'd do before doing any of these things [safe behaviours]."

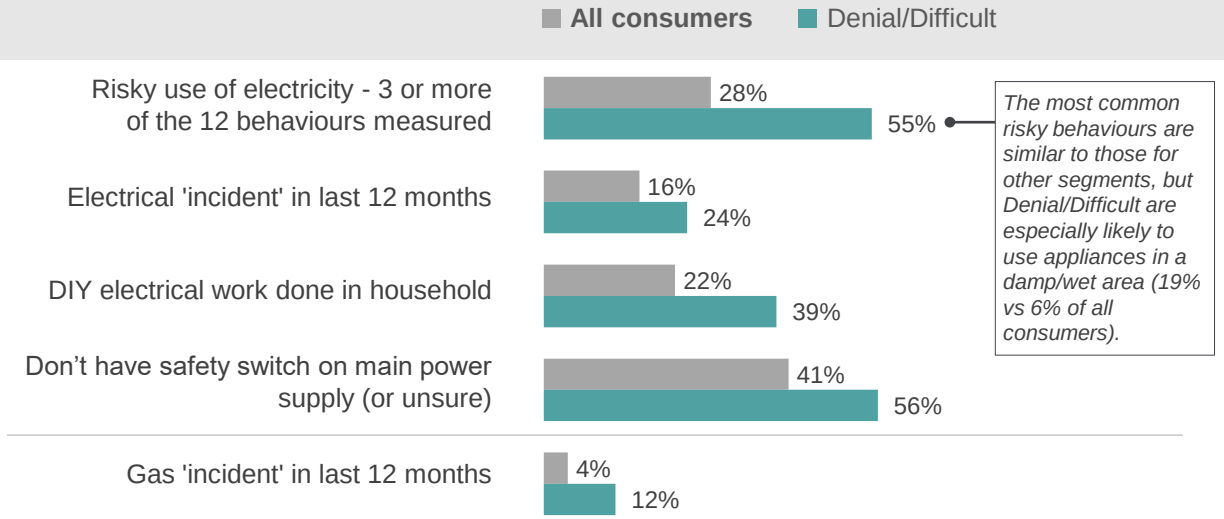
DEMOGRAPHIC PROFILE

Denial/Difficult is the youngest segment, with a high proportion of renters/boarders.



BEHAVIOURAL PROFILE

The **Denial/Difficult** display the most risky behaviours of any segment.



Percentages give incidence of behaviours in Denial/Difficult segment, e.g. read as 55% of this segment displayed 3 or more the 12 risky behaviours measured.

Denial Deeann

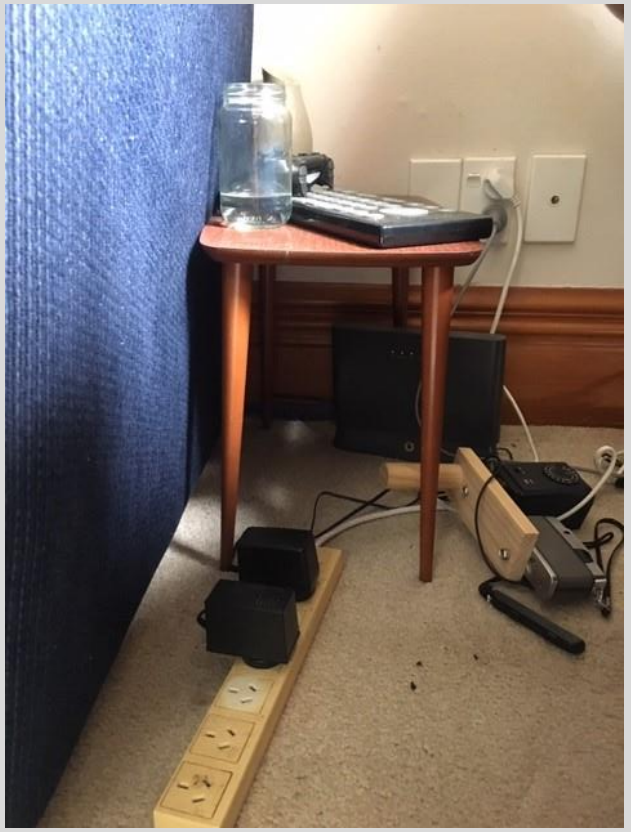
Deeann is a third-year university student flatting in a large, older house with four other students.

She is pretty laidback, doesn't seem to be an overly anxious type. She doesn't tend to 'sweat the small stuff'.

When it comes to electricity and gas, Deeann doesn't think about what could possibly go wrong. She says it's common knowledge you shouldn't mix electricity and water, but doesn't know what might happen if you did. She has spilt water over the multiplug a couple of times and it seemed fine. So, she's not overly concerned if water is left around multiplugs.

Otherwise, Deeann doesn't know what she should do to be safe around electricity and gas. For example, she wouldn't know what a hot spot on an electric blanket was; nor would she know to check (or how to check) for gas leaks on the BBQ.

Overall, Deeann thinks the likelihood of something going wrong is pretty slim.



Accidently spilled water over the multiplug (twice before). Yet, there is a glass of water left on the table above the multiplug.

Denial: Behavioural challenges – “what’s the problem?”

COST/ BENEFIT

Convenience led
All hassle: no benefit. Safety doesn’t have an upside as they gain no personal satisfaction from it, and the threat of risk is low.

EFFICACY

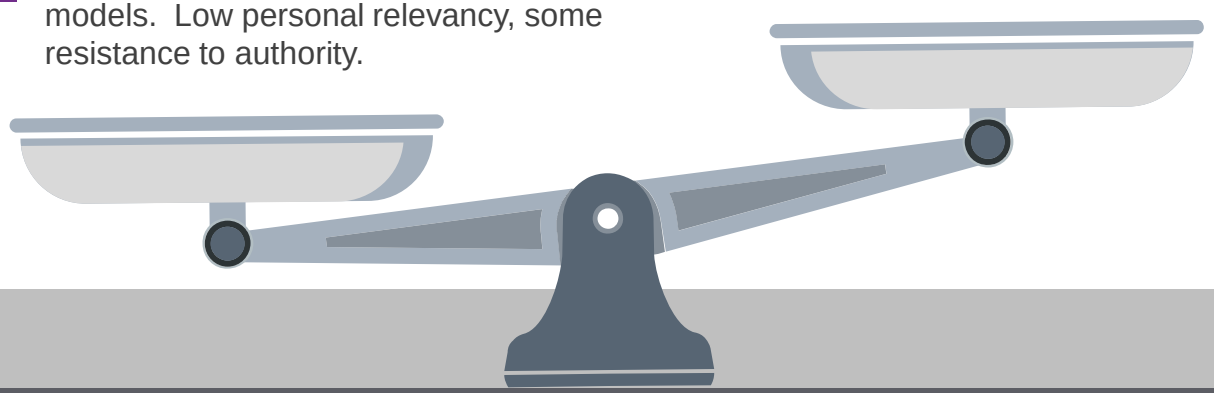
Low effort
Resistant to any effort to finding about better ways to be safe.

CONTEXT/SETTING

Out of sight
Don’t think about it as no tangible presence of hazard. Rental setting means that it’s not their problem.

NORMS

No social norms
People around them are not positive role models. Low personal relevancy, some resistance to authority.



Denial: Behavioural pathways – open their eyes

COST/ BENEFIT

Convenience led
All hassle: no benefit. Safety doesn't have an upside as they gain no personal satisfaction from it, and the threat of risk is low.

EFFICACY

Low effort
Resistant to any effort to finding about better ways to be safe.

CONTEXT/SETTING

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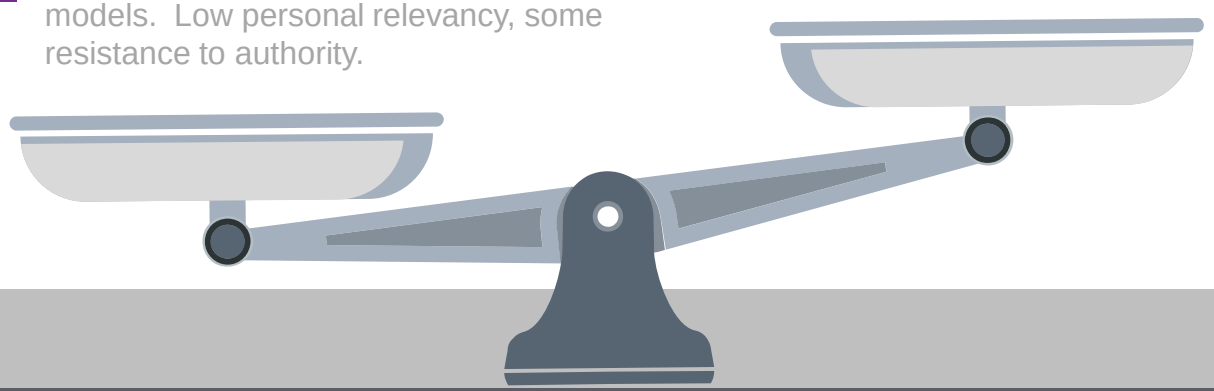


COST/ BENEFIT

EFFICACY

Increase threat
Open their eyes to the risk.
Avoid hassle factor through keeping ask to a minimum. Don't ask too much effort.

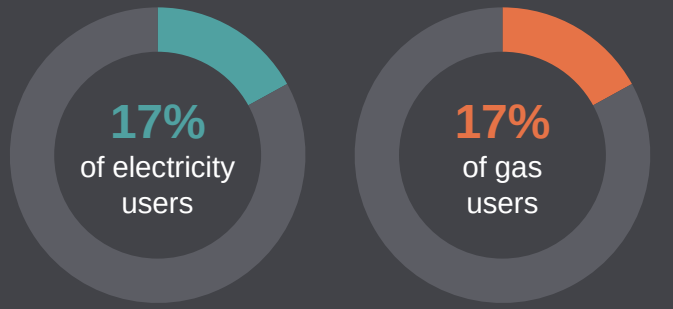
CONTEXT/SETTING

Bring to forefront
Be present within household context.
Engage landlords.

NORMS

Change social norms
Make a topic of conversation amongst peers. Show that people like them make the effort.

Followers

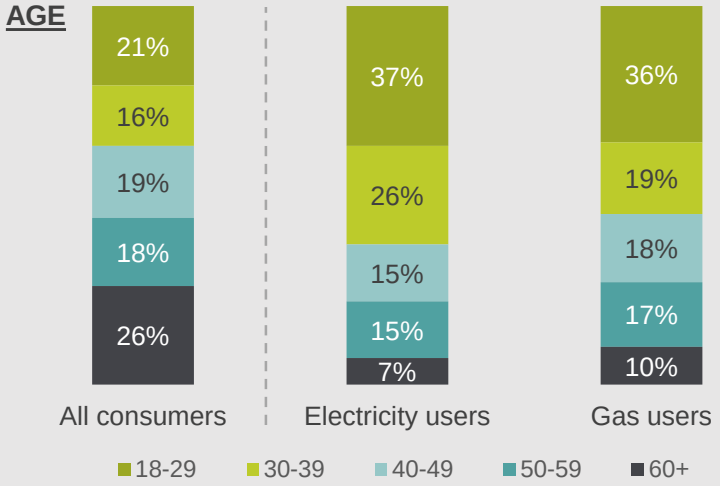


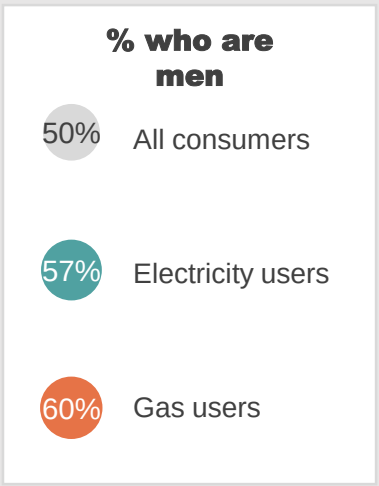
Followers are not currently following safety conscious social norms. Their thinking may be set through exposure to the risky behaviours of uncommitted groups. (Followers were not identified in the qualitative research. These findings are therefore from the survey).

- Safety is an inconvenience and not something they spend a lot of time thinking or doing something about.
- Problems can generally be avoided by not being stupid.
- Safety is not something they generally derive much satisfaction from, nor do they consider gas and electricity to be risky.
- Cost sensitive and prioritise convenience.

DEMOGRAPHIC PROFILE

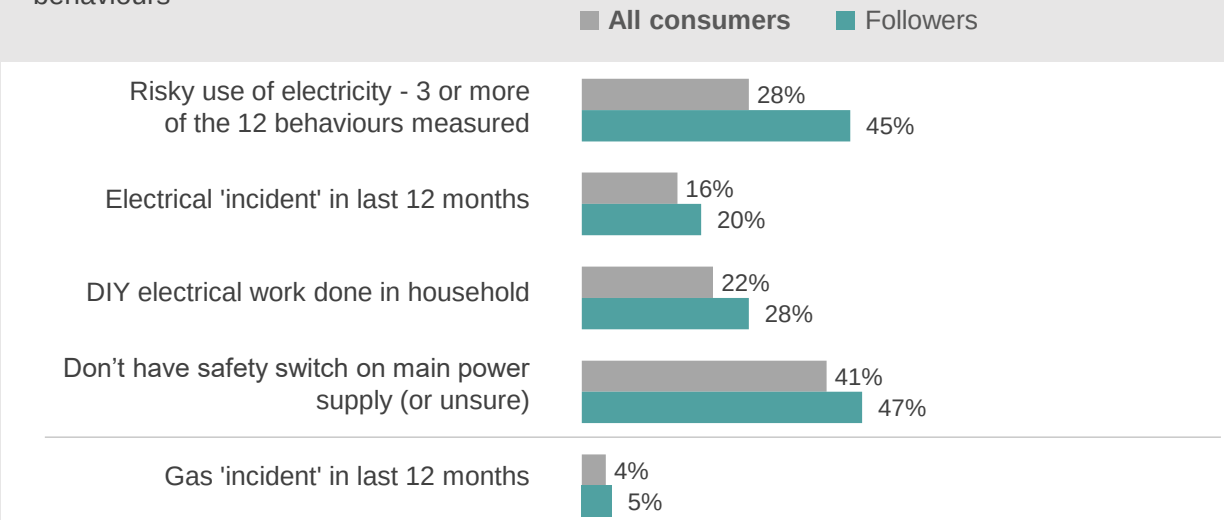
Followers are young, and skewed towards men





BEHAVIOURAL PROFILE

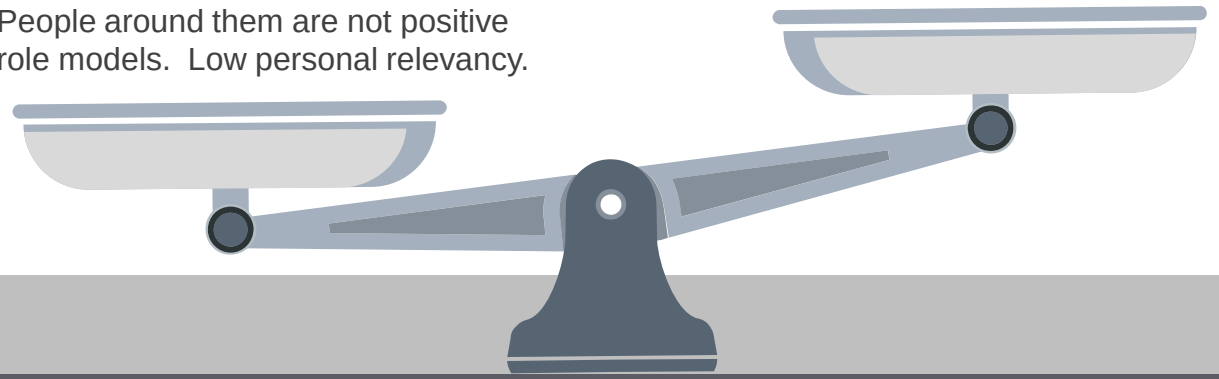
The **Followers** segment is second only to the Denial/Difficult segment in their display of risky behaviours



Percentages give incidence of behaviours in the Followers segment, e.g. read as 45% of this segment displayed 3 or more the 12 risky behaviours measured.

Followers: Behavioural challenges – “I could…but I don’t”

COST/ BENEFIT	**Convenience and cost sensitive** Trade off convenience and cost for little perceived gain. Threat of risk is low.
HEURISTICS	**Risks are caused by stupidity** I’ll be right so long as I don’t do anything stupid.
CONTEXT/SETTING	**Out of sight** Don’t think about it as no tangible presence of hazard.
NORMS	**No social norms** People around them are not positive role models. Low personal relevancy.



Followers: Behavioural Pathways – help them appreciate the unknowns

COST/ BENEFIT

Convenience and cost sensitive
Trade off convenience and cost for little perceived gain. Threat of risk is low.

HEURISTICS

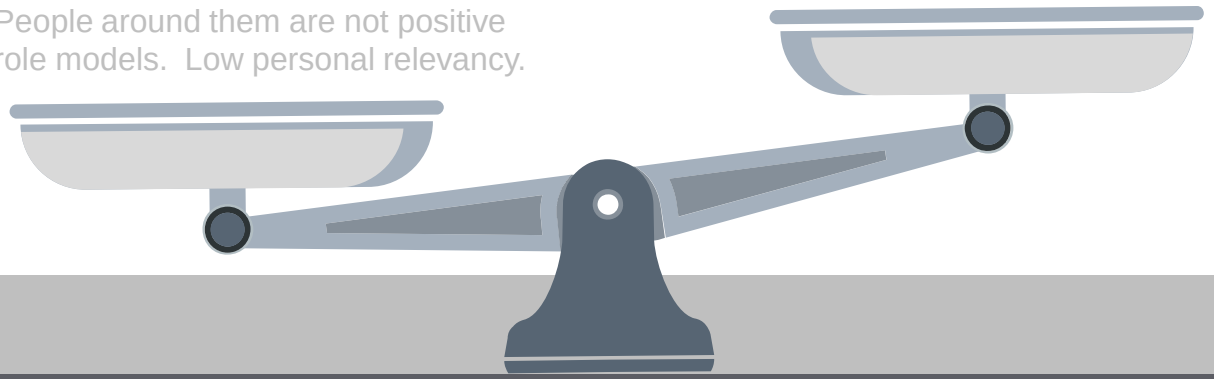
Risks are caused by stupidity
I'll be right so long as I don't do anything stupid.

CONTEXT/SETTING

Out of sight
Don't think about it as no tangible presence of hazard.

NORMS

No social norms
People around them are not positive role models. Low personal relevancy.



COST/ BENEFIT

HEURISTICS

Increase unforeseen threat
Show them that there are risks that they don't know about and that are not due to stupidity. Reframe cost as insurance against these unforeseen risks.

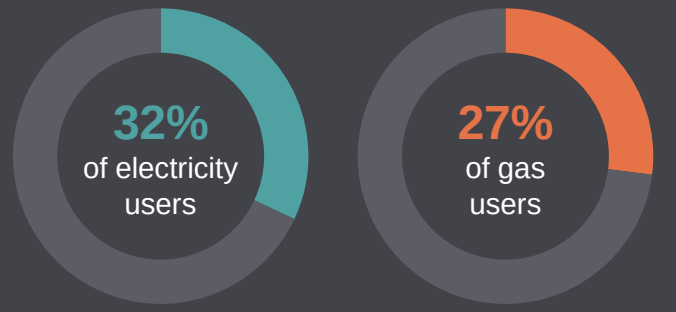
CONTEXT/SETTING

Bring to forefront
Be present within household context.

NORMS

Change social norms
Make a topic of conversation amongst peers. Show that people like them make the effort.

Flustered



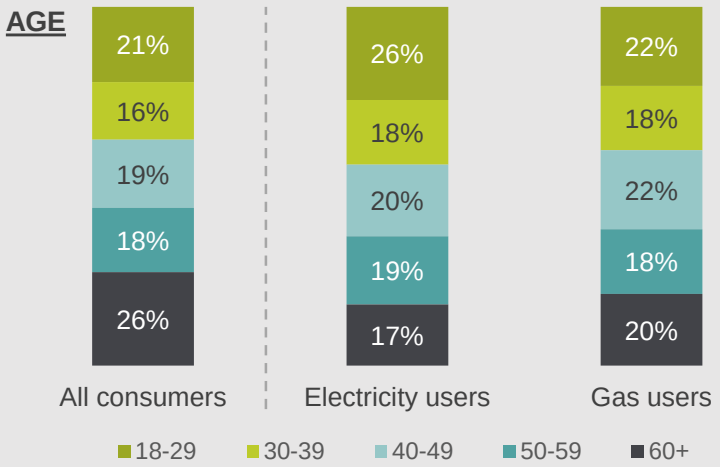
These consumers are conflicted in their behaviour. They may not 'actively' want to exhibit unsafe behaviour, but their unconscious attitudes are a barrier.

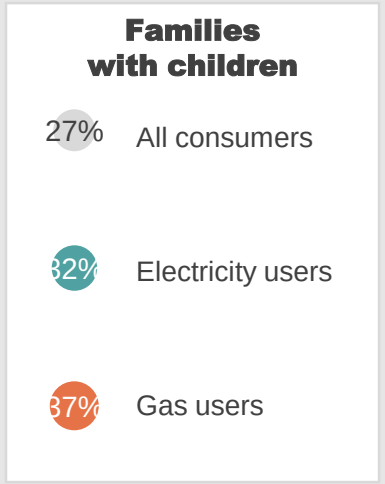
- Knows what's right, but doesn't always do it. Takes considered risks.
- Will rationalise unsafe behaviour and therefore dismiss it.
- Avoids real risks or has 'work arounds'.
- Doesn't know how or what to check.
- Uses manufacturers guidelines/instructions to 'cover their butts'.

"Yeah, I'll often leave something on the stove when no-one is home…
… but it's on low heat,
… it's only for a short time,
… only when cooking with water – not oil."

DEMOGRAPHIC PROFILE

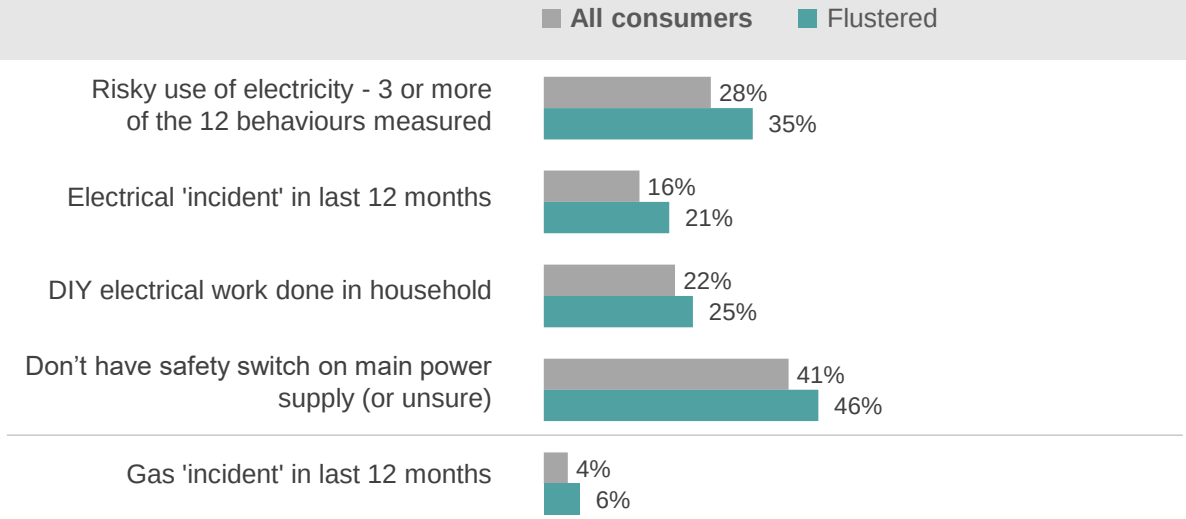
Flustered are a young to middle aged segment, with a higher proportion of families with pre-school or school aged children





BEHAVIOURAL PROFILE

The **Flustered** segment display higher than average risky behaviours (on all measures).



Percentages give incidence of behaviours in Flustered segment, e.g. read as 46% of this segment don't have a safety switch on their main power supply or are unsure.

Flustered Fiona

Fiona, lives with her husband and two young children. She is very family orientated and feels she has a strong moral compass. She values warm relationships with others and the sense of belonging that that provides.

She likes to think of herself as carefree and someone who doesn't take life too seriously, after all, where's the fun in that! She feels you could waste time and money worrying about risks that aren't there.

Fiona doesn't want to do the wrong thing (unsafe behaviour), but can easily rationalise doing it… [safe behaviour] might be too hard, not much fun or she may not know the actual details required to do it. If something does go wrong, she can also easily underrate the damage, for example when her element erupted in flames, she said "*it was OK, it was only on fire for a little bit".*

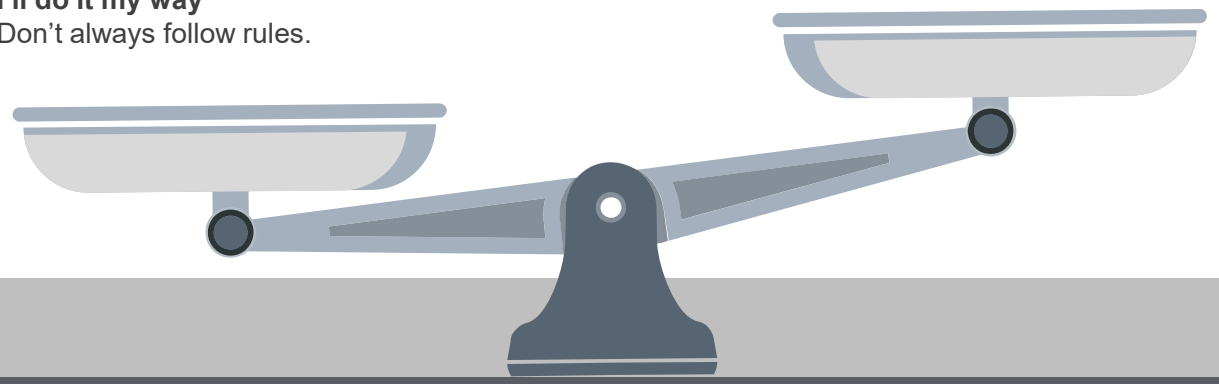
Another time she bought a hair clipper set online, from the USA. When she plugged it in at home, it made an awful smell and noise. She didn't know that the USA voltage was different to NZ, she just figured she should be able to plug it in. Similarly, she's heard recently that it's a good idea to check electric blankets for hot spots, but if she's being completely honest, she doesn't know what a 'hot spot is' or indeed how to check for one.

She takes comfort in the fact that her family are pretty sensible. The kids know that there's a light switch in the hallway that flashes and buzzes a bit, so they just don't use that one. Again, she rationalises that she probably should get an electrician around to have a look at it, but it seems like a lot of money for one small thing… she'd rather wait until she's got a list of things for an electrician to look at… because that would be better value for money!

"Once I know about something and it makes sense, I'll probably do it... but there's nothing wrong with these pictures…"

Flustered: Behavioural challenges – “maybe I should…but this’ll do”

COST/ BENEFIT	**Convenience and cost sensitive** ideal, but it’s OK. Pragmatic approach to risks and costs – why pay for something you can work around. Protecting their family is important but risks are low so doesn’t drive their behaviour.
CONTEXT/SETTING	**Out of sight** ‘Solve’ it and move on mentality.
NORMS	**Unhelpful social norms** Few positive role models, possibly also influenced by Kiwi no.8 wire mentality but doesn’t want to be seen to do the wrong thing.
LEGITIMACY	**I’ll do it my way** Don’t always follow rules.



Flustered: Behavioural pathways – do right by the family

COST/ BENEFIT

Convenience and cost sensitive
ideal, but it's OK. Pragmatic approach to risks and costs – why pay for something you can work around. Protecting their family is important but risks are low so doesn't drive their behaviour.

CONTEXT/SETTING

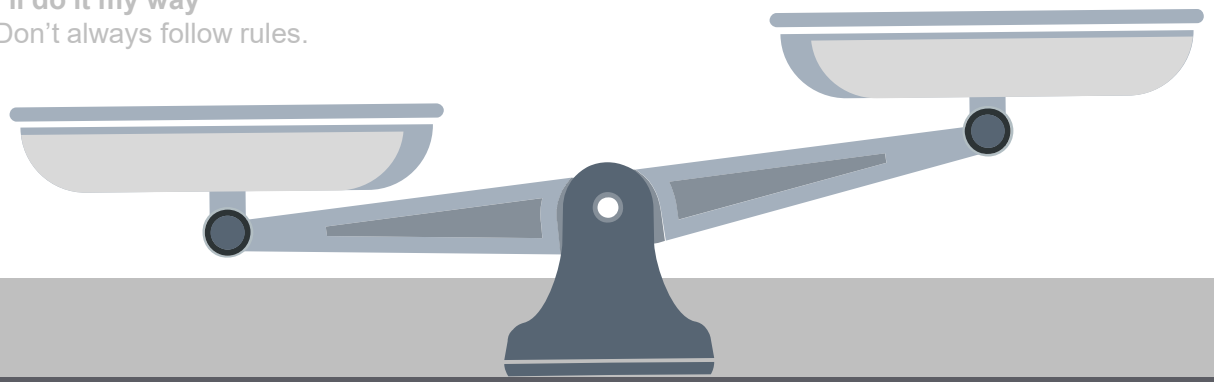
Out of sight
'Solve' it and move on mentality.

NORMS

Unhelpful social norms
Few positive role models, possibly also influenced by Kiwi no.8 wire mentality but doesn't want to be seen to do the wrong thing.

LEGITIMACY

I'll do it my way
Don't always follow rules.



COST/ BENEFIT

Connect protection to the proper way
Nudge them from their pragmatic approach towards proper fixes through linking it with protecting those they care for.

CONTEXT/SETTING

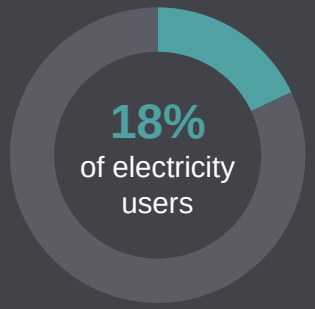
Reassess whether they are truly safe
Create space for reflection on what might need addressing.

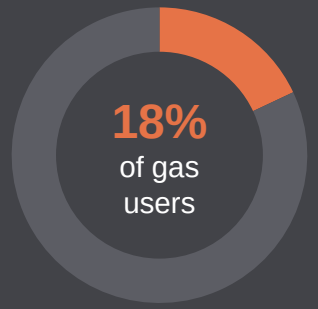
NORMS

LEGITIMACY

Address social norms
Strengthen narrative around gas/electricity not being the place for work arounds. Show that other people don't take the same chances

Attainers





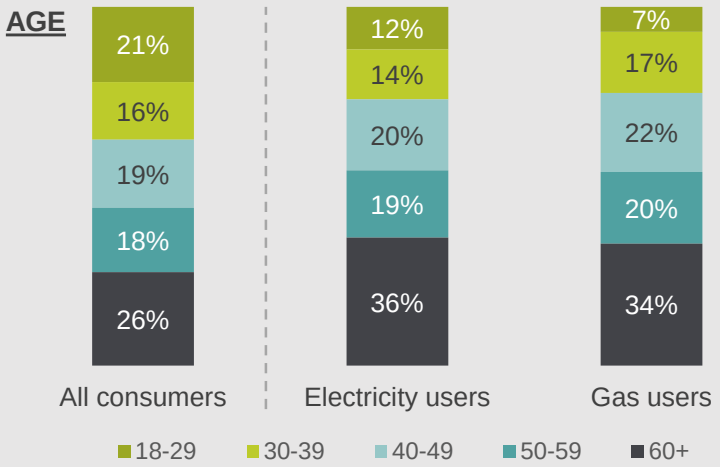
Attainers are strongly committed to safe behaviour, but unlikely to seek to influence others.

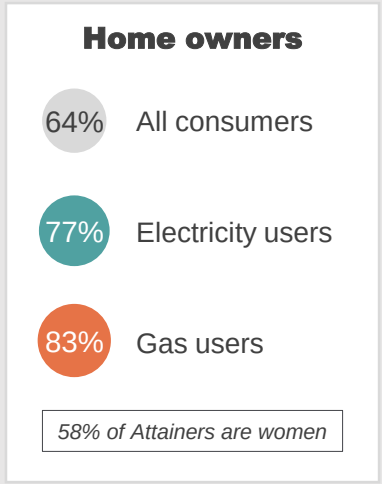
- Being safe is the right thing to do.
- Preventative mindset. Fence at top of cliff, not ambulance at bottom.
- Perceives real risks and takes steps to mitigate them.
- High knowledge and capability.
- Strong support for the rules – there to protect.
- Language shifts from safety to protection.

"I'm not interested in having a go at fixing it [appliance fault] if I'm unsure about it or if it puts my life at risk."

DEMOGRAPHIC PROFILE

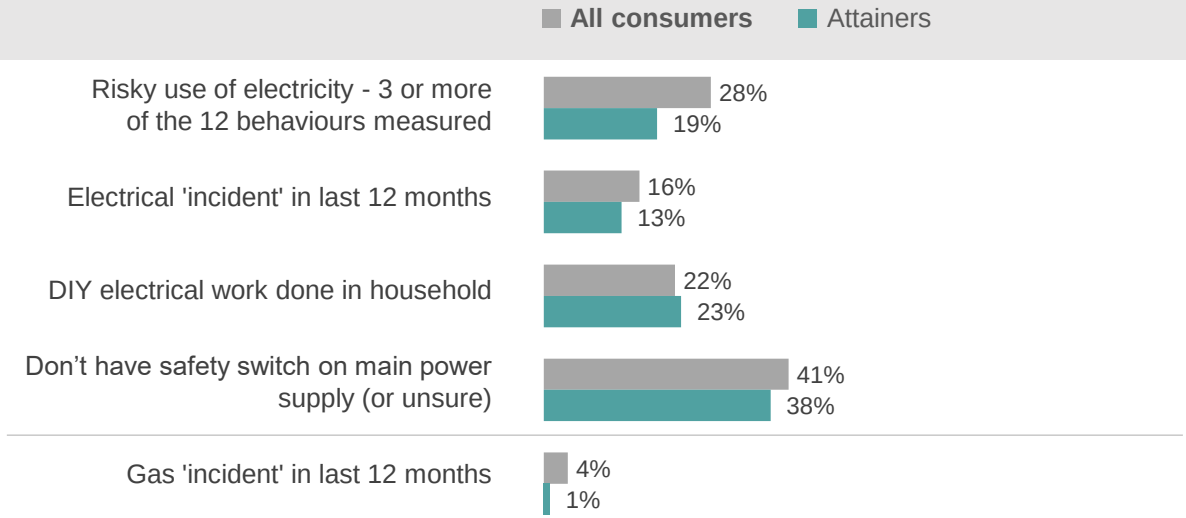
Attainers are mostly home owners, middle aged and older (and with a skew towards women for electricity users)





BEHAVIOURAL PROFILE

Attainers have a relatively low risky behaviour profile.



Percentages give incidence of behaviours in the Attainers segment, e.g. read as only 13% of this segment had an electrical incident in the last 12 months.

Attainer Anna

Anna works in IT support. In her spare time, she and her partner love the escapism that online gaming provides them.

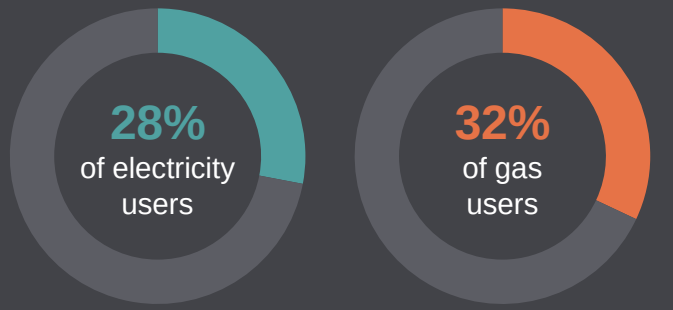
She likes to think of herself as quite knowledgeable when it comes to electronics – and by default electricity and gas. She's grown her knowledge through those she helps at work and being exposed to some of the dodgy things people do at work. Of course, her desire for knowledge was probably influenced by the close call she had as a child. She recalls leaving her electric blanket on the highest setting, all day and all night. One day it started smouldering and burnt a hole in the bedsheets down through the mattress. This had a clear impact on her as she could have been in the bed at the time. And of course, her family remind her of it constantly! It has become a form of family folk lore.

She can easily rattle off risks and potential outcomes when gas and electricity is not used correctly. In saying that, her level of knowledge provides a degree of comfort and she is relaxed knowing that as long as she maintains a level of conscious awareness in her daily life (i.e. doesn't get complacent) she will be fine.

Overall, she feels her interest in electronics (computers/gaming) has made her even safer. While it's important to protect herself, she also wants to protect her 'investment' in her electronics and gaming equipment. The guys at her local electronics store have inadvertently influenced her behaviour – reinforcing the need for surge protectors, educating about how different appliances draw different amounts of electricity.

Keeping it simple and everything switched off.

Advocates



Advocates have the strongest commitment to safe behaviour. They are likely to role model safety and seek to influence others.

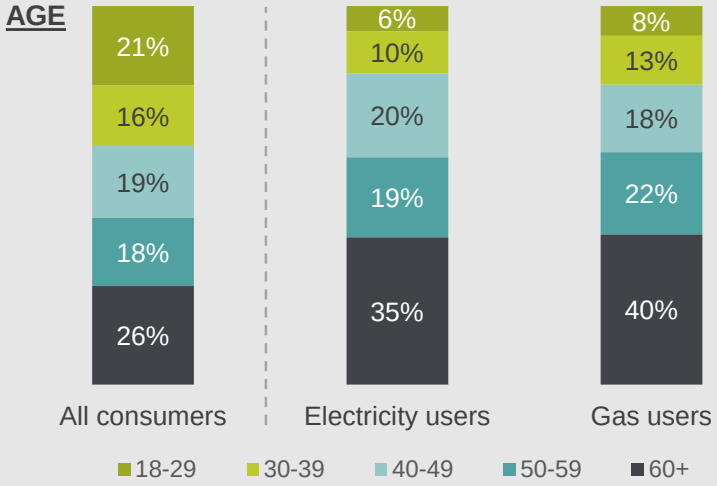
- Protecting others is the right thing to do; safety is ingrained and easy to do.
- Emotive benefits to being safe: peace of mind, reassurance, deep satisfaction.
- Follower of rules and instructions.
- Role models – seek to influence others' concept of adults as kaitiaki.

"Down in Dunedin all my flatmates had electric blankets and that was the thing that I had to get used to because I couldn't tell them they weren't allowed them, but that seems very risky to me…

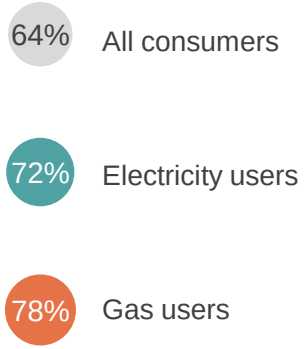
I talked to a couple of them. A couple of them actually said they'd be fine not using them, and there's the one who wanted to keep his and he had a brand new one, so that was fine. I asked [the others] if they could make sure they didn't leave [their electric blankets] on overnight or when they weren't in their room, if they just have it on for an hour before bed."

DEMOGRAPHIC PROFILE

Advocates are older, with a skew towards women, and mainly homeowners.

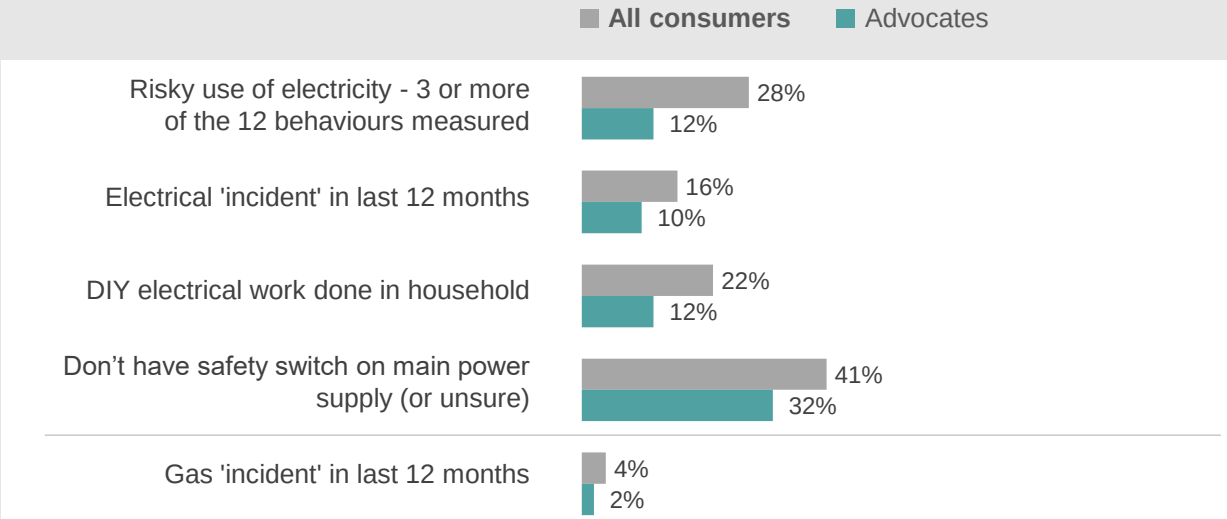


Home owners



BEHAVIOURAL PROFILE

Advocates take the least behavioural risks of any segment.



Percentages give incidence of behaviours in the Advocates segment, e.g. read as only 12% of this segment displayed 3 or more the 12 risky behaviours measured.

Advocate Angus

Angus works as an accountant for a non-profit organisation. He tries to act in a socially responsible manner, in all aspects of his life. And in his role as a parent, it's important to him to instil these values into his children as well.

Angus lives with his wife and two teenage children. He feels it is his responsibly to monitor others' behaviour. He will go around different rooms of the house to do checks and make sure all the appliances have been switched off at the wall (because sometimes his children forget!).

His constant reminders have formed the basis of 'dad jokes' or sayings in the family home. He likes this idea, because it feels less like nagging and more like they are sharing in a common cause – as a household, they're minimising wastage, being responsible and doing the right thing as a consequence of being safe.

While Angus is confident to actively monitor how electricity and gas is used in his home, he admits some of the new appliances/technologies make him a little uncomfortable. For example, what happens if mobile phone batteries are charging and they reach their full capacity while still being plugged in? And should he be charging a mobile phone on a multi board? However, he's quite comfortable to do some research on the matter and convey his findings to his family to make sure everyone is fully informed. He'll probably read the user manuals as well, because they are there for a reason!

"I take the time to read manuals, after all they are the manufacturer's recommendations."

COLMAR BRUNTON
A Kantar Public Company

Bringing it together: key ideas

WORKSAFE
NEW ZEALAND | MAHI HAUMARU AOTEAROA

Major challenges and opportunities

Doing what's convenient is most important
Denial (E) Denial (G), Followers (E), Followers (G), Flustered (G) Flustered (E)

Cost is a barrier to engaging qualified tradesperson/ replacing faulty appliances Followers (E), Followers (G), Flustered (G) Flustered (E)

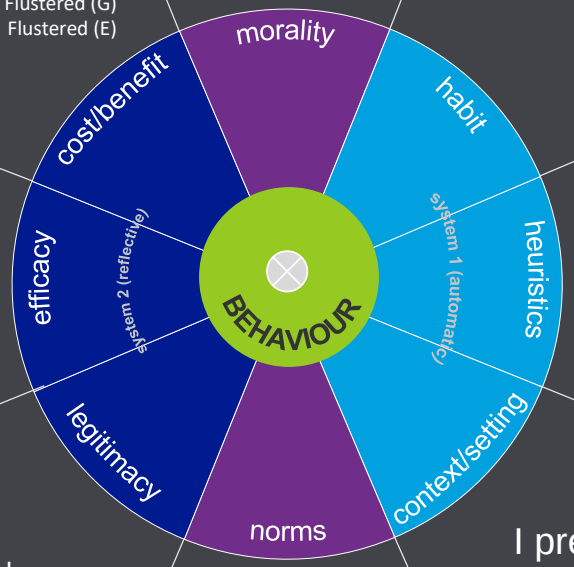
I don't put a lot of effort into finding out the best way to stay safe with electricity/gas and appliances
Followers (E), Denial (G)

I don't like being told what I can and can't do when it comes to electricity/gas and safety
Followers (G)

Most people I know don't give any thought to electrical/gas hazards
Denial (E), Followers (E), Flustered (E)

I prefer not to think about safety with electricity/gas – 'out of sight, out of mind'
Denial (E), Followers (E), Denial (G), Follower (G), Flustered (G)

I figure it'll usually be alright as long as I don't do stupid stuff
Followers (E)



It's not worth the inconvenience/cost as there's no real benefit and not much risk.
Change the threat level

I don't see the risk – so I don't address it.
Make it more present

No-one is /showing telling me any different
Influence social norms

Major challenges and opportunities: ideas

It’s not worth the inconvenience/cost as there’s no real benefit and not much risk.
Change the threat level

Reframe the threat of gas from being ‘a big explosion’ to the more invidious threat of slow poisoning (carbon monoxide).

The fact that you can’t see or can’t smell it is now the very reason you need to worry about it.

Major challenges and opportunities: ideas

It’s not worth the inconvenience/cost as there’s no real benefit and not much risk.
Change the threat level

Remind people that electric shocks are not to be brushed off or trifled with!

Major challenges and opportunities: ideas

I don’t see the risk – so I don’t address it.
Make it more present

How does safety have more presence in homes?

E.g. Campaign for carbon monoxide alarms in every (rental) home.

Major challenges and opportunities: ideas

No-one is /showing telling me any different
Influence social norms

Electricity is not the place for number 8 wire mentality.

The cost of a quick fix now could be enormous in the future – their prized possessions or their lives.

For family audiences, this can be connected to their motivation to protect their family.

Major challenges and opportunities: ideas

Potential influencer groups

Landlords
Parents of young adults
Community groups and marae
Universities and schools
Insurance companies

No-one is /showing telling me any different
Influence social norms

Help messages infiltrate target groups through encouraging advocates to connect with target groups.

Some influencers (e.g. landlords) may need to be encouraged to take safety actions on behalf of those who are unlikely to take the actions themselves.