

Public response to the Iran war fuel crisis – evidence from Ireland’s Behavioural Energy & Travel Tracker

SEAI Behavioural Economics Unit

Introduction

The onset of war in Iran at the end of February 2026, and the subsequent disruption to shipping through the Strait of Hormuz, led to a sharp increase in global crude oil prices. In Ireland, these price shocks were quickly transmitted to consumers, particularly in the price of petrol, diesel, and heating oil. This has placed additional financial pressure on households and businesses, many of whom were already coping with elevated cost of living.

The government has since introduced several measures to help alleviate this burden, including cuts to excise duty on petrol and diesel. This, combined with a reduction in crude oil prices has meant prices have eased somewhat from their peak. However, the events of the last few months have revealed how exposed we are to any future price shocks, and energy prices remain high. In light of this, it is important to understand the impact the recent crisis has had on Irish citizens and how they think we should go about improving our resilience to future crises.

To investigate these issues, we use data from our Behavioural Energy & Travel Tracker (BETT)¹ to look at the impact the recent crisis has had on people in Ireland, how they say they have responded, changes in behaviour in the latest survey wave (run in early May) compared with waves run before the crisis and what people’s preferences are for government approaches to protect the country from future price shocks. Although BETT has been running since 2022, we focus on data collected since 2024 to avoid comparison to behaviour during the previous 2021-2023 energy crisis. We focus our analysis primarily on behaviours related to oil consumption (i.e. driving and home heating use).

Ireland’s Behavioural Energy and Travel Tracker

The Behavioural Energy and Travel Tracker (BETT) is an online survey designed by SEAI’s Behavioural Economics Unit. The tracker uses a behavioural science technique known as the “Day Reconstruction Method” to gather accurate and granular data about travel and home energy behaviours in Ireland over time. It also collects data on factors that may be related to energy behaviour, such as psychological factors, energy poverty, and dwelling and sociodemographic characteristics. BETT ran monthly from December 2022 to December 2023 and continues to run on a quarterly basis. Each survey wave is run with a nationally representative sample of approximately 1,000 adults (recruited from RedC Research & Marketing’s online panel).

¹ <https://www.seai.ie/data-and-insights/behavioural-insights/publications/behavioural-energy-and-tr>

Findings

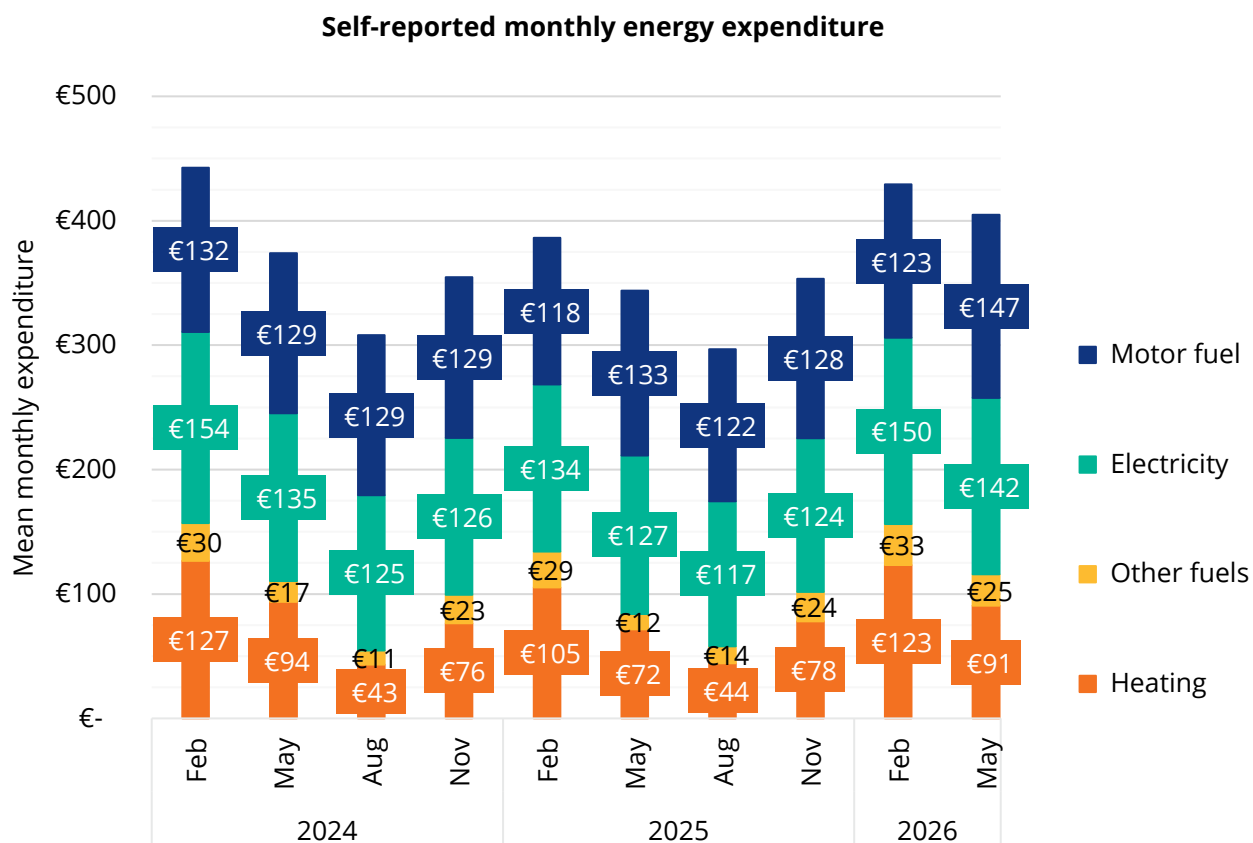
We report briefly here some of the main findings of our analysis. Where statistically significant differences are reported, these have been verified using regression models controlling for sociodemographic factors.

Impact on consumers

Energy expenditure

Through BETT we collect data on energy expenditure by asking participants to report how much they spent on heating, electricity, other secondary heating fuels and motor fuel in the preceding month (Figure 1). Following an easing of costs over 2024 and 2025, we are now seeing expenditure rise again, although this was already evident in early February before the onset of the Iran war fuel crisis. The most recent wave does, however, show a clear increase in expenditure on motor fuel prices (€147 vs. €123 in February and €133 last May).

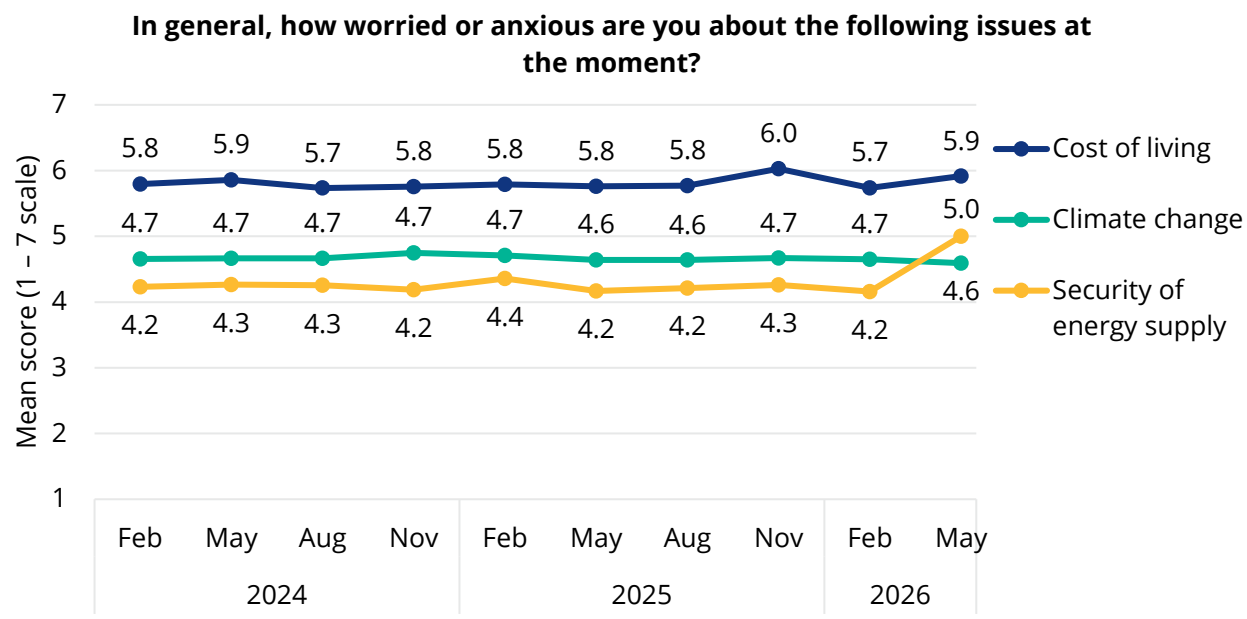
Figure 1. Energy-related expenditure in the month preceding data collection reported by participants.



Psychological impact

To gauge what psychological impact, if any, the recent crisis might be having on consumers, we look at the level of worry they are reporting about related issues (Figure 2). There was a negligible increase in worry about cost of living in May compared with previous survey waves, although the level of worry was already consistently very high (rated almost 6 on a 7-point scale). In contrast, we saw a large increase in worry about energy security in May compared with February (from 4.2 to 5) and all preceding waves. No change was seen in worry about climate change, which remains high.

Figure 2. Level of worry reported by participants about (a) cost of living, (b) climate change and (c) security of energy supply, on a scale from 1 (Not at all worried) to 7 (Extremely worried).

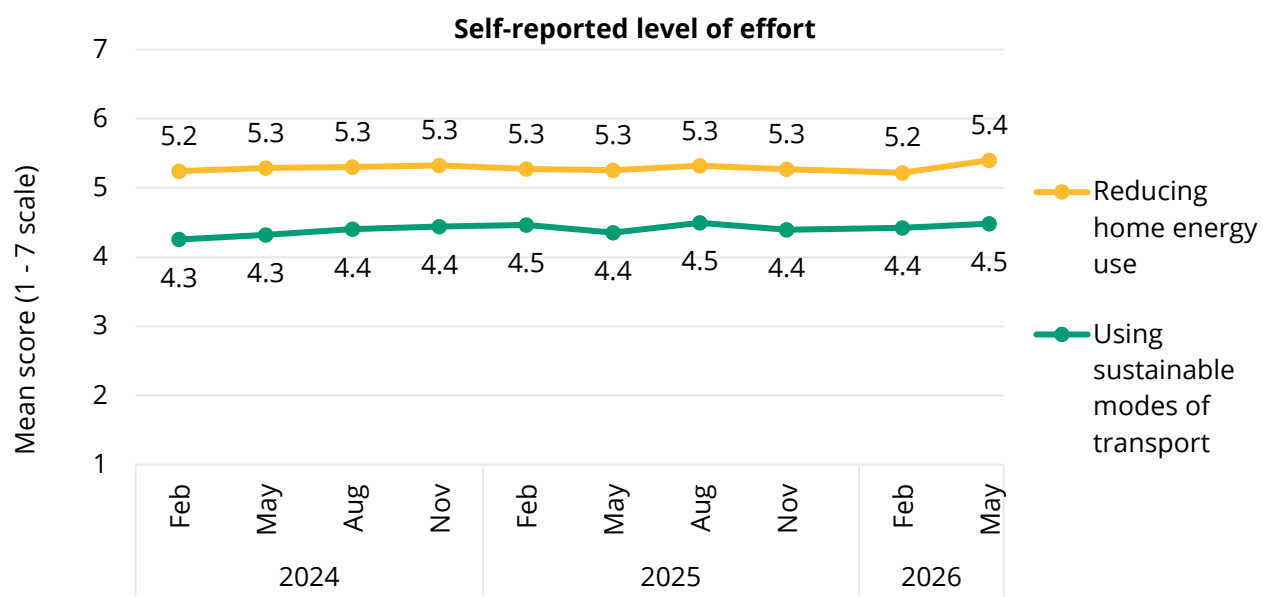


How people say they’ve responded to the crisis

Self-reported effort ratings

We ask BETT participants to rate the level of effort they’re making to reduce home energy use and use sustainable modes of transport (Figure 3). In May 2026 we saw a slight increase in effort being made to reduce energy at home, but no significant change in efforts to use sustainable transport. When asked to rank their motivations, saving money was the top ranked motivation in both cases (81% of those making an effort to reduce home energy use, 50% of those making an effort to use sustainable modes of transport), but this was also the case before the recent fuel crisis.

Figure 3. Participants’ self-reported effort made to (a) reduce home energy use and (b) use sustainable modes of transport, rated on a scale from 1 (Not making an effort) to 7 (Doing everything possible).



Changes made in response to the crisis

In May 2026, we added an open response question to BETT asking people if they had made any changes to how they use energy/fuel to save money, in the context of recent cost increases due to the war in Iran. A little under half of participants said they had made changes and 44% gave examples of how they had changed their consumption (others mentioned shopping around for fuel and other cost management measures). Women, people aged over 55, from higher (ABC1) social grades, and those living in rural areas were more likely to say they had changed their behaviour.

The most common change mentioned (23% of the overall sample) was reducing car use, whether through modal shift or avoiding making journeys in the first place. Very few (eight mentions) said they were reducing their fuel consumption by driving more slowly, however. The other main change cited was reducing home heating. This was mentioned by 16% of people, just under two thirds of which were oil boiler owners. Participants mentioned avoiding putting on the heating or reducing the time for which it's used, but only three mentioned using lower thermostat settings. Other changes mentioned include a variety of home energy saving measures (e.g. batch cooking), shifting electricity use to off-peak times, and investing in energy efficiency or renewable energy technologies. Sixteen participants mentioned adopting solar PV, 10 switched to an EV or plug-in hybrid, but there were no explicit mentions of switching to a heat pump.

Behavioural changes following the energy crisis

The primary purpose of BETT is to collect detailed and accurate data on people's everyday energy behaviour. Here we highlight changes (or lack thereof) in selected behaviours in May 2026 compared with preceding waves, with a focus particularly on owners of ICE (petrol/diesel) vehicles and oil boilers, who are most likely to have been affected by recent price increases.

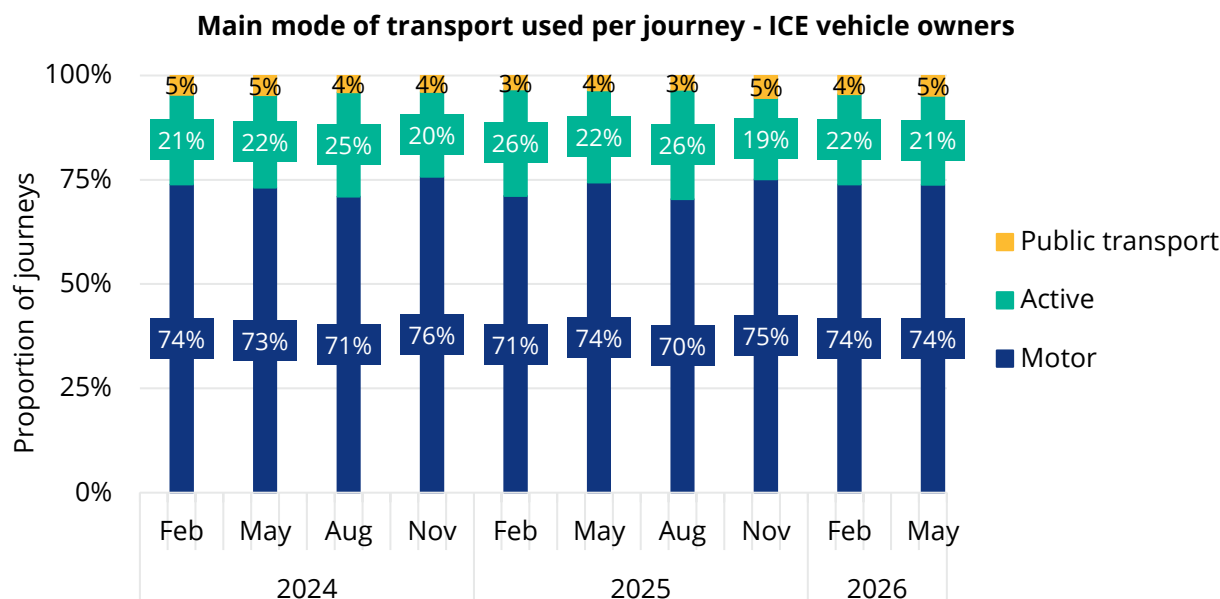
Travel behaviour

Overall, we found no evidence of a reduction in car journeys taken in May 2026 compared with preceding survey waves. There were more journeys made by motorised transport (car, taxi or motorbike) in May than in February (approximately 1.8 vs. 1.7 per person per day).

Focusing specifically on ICE vehicle owners (three quarters of our sample), there was no evidence of modal shift in response to the fuel crisis (Figure 4). In May 2026, just under three quarters of their journeys were made primarily using motorised transport, the same as in February. This proportion is lower for journeys under 5 km (60%) and for those living in urban areas (67%), but again comparable to previous survey waves.

We also did not see any changes in the prevalence of driving more slowly to save fuel. ICE vehicle owners reported doing so for 18% of car journeys over 5 km – the lowest proportion since the summer of 2023. This behaviour was much more common among EV owners (39% of their car journeys over 5 km).

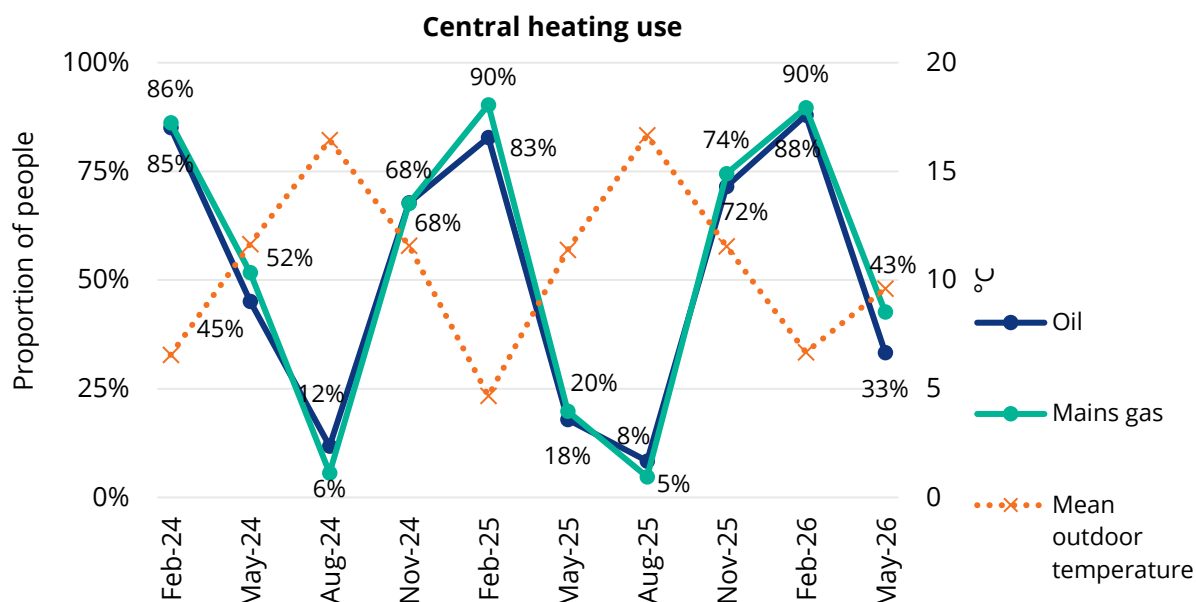
Figure 4. Modal share for journeys made by ICE vehicle owners. For multi-modal journeys, the mode used to cover the longest portion of the journey is counted.



Heating

Central heating use was higher in May 2026 than at a similar time last year (used by 33% of people who were home on a given day vs. 18% in May 2025). However, this is likely largely due to outdoor air temperatures being unseasonably low (an average of 9.6°C over our study period vs. 11.4°C last year).

Figure 5. Proportion of people in homes heated by (a) oil and (b) mains gas using central heating in any given day (assuming they spent some time at home). Also shown for context is the mean outdoor temperature recorded for each wave.



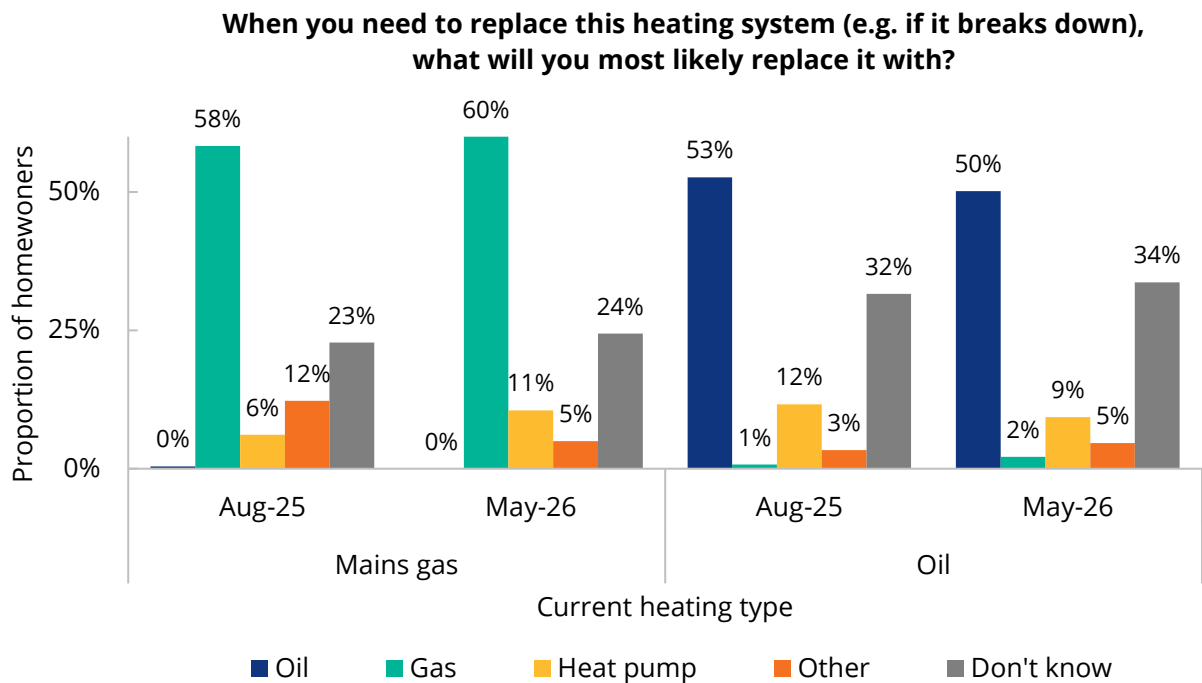
To better understand if recent increases in oil prices have caused people to cut back, we compare heating use in homes heated primarily using oil to those heated using mains gas, which taken together account for about two thirds of the sample (Figure 5). Those using oil do seem to have cut back in the latest wave compared with gas-heated homes; there was a 10 percentage point difference in use between the two groups in May, whereas over the last year this difference was typically only two or

three percentage points. Regression models show this to be a statistically significant effect, but no effects were found on the duration for which heating was used or on thermostat settings.²

Heating system

In August 2025, we included a question in BETT asking homeowners what heating system they planned to get when their current system needs replacing. We repeated this question in May 2026 to see if there have been any changes in preferences in light of recent events (Figure 6). We did not see any major changes in preferences since last summer – people are still most likely to stick with the system they currently have, more so for gas than oil. It is worth noting that a significant minority of participants are unsure what their next heating system will be (about a quarter of those using gas and a third of those using oil). Among those saying they would switch to a different heating system, a heat pump is now the most popular option among both oil and gas heated homes.

Figure 6. Stated preferences for future heating system for homeowners currently using (a) mains gas and (b) oil, in both August 2025 and May 2026.

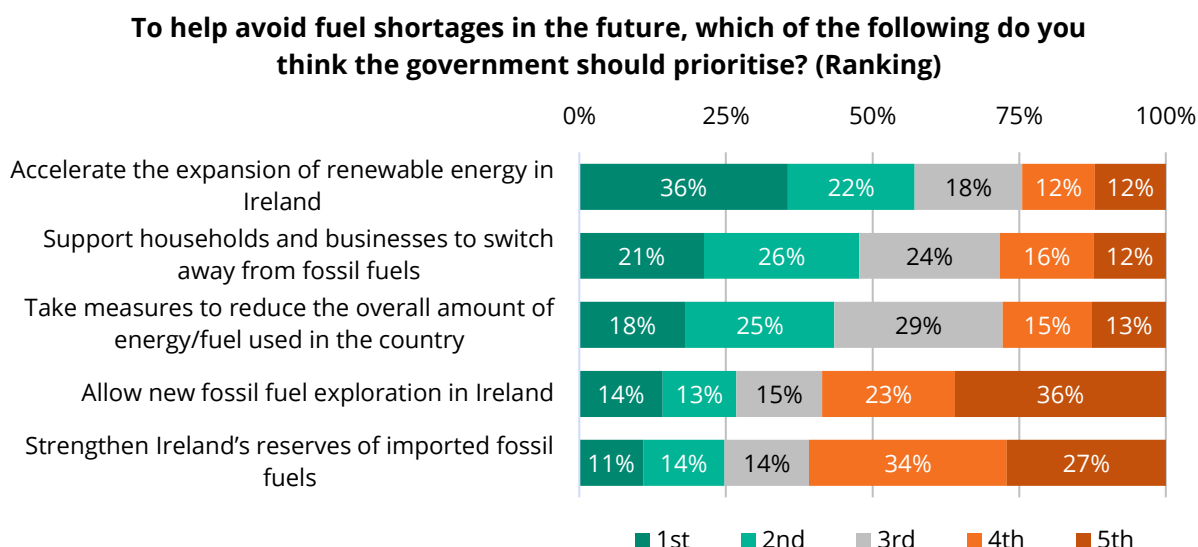


Preferences for government response

In the May 2026 wave, we added a question to BETT asking participants to rank their preference for government approaches to reduce the chance of future fuel shortages (Figure 7). The majority (57%) of participants ranked approaches focused on renewable energy as their preferred option, whereas just a quarter preferred approaches focused on fossil fuels. Men and those from lower social grades were more likely to rank fossil fuel options first, whereas young people (under 35) were less likely to. An approach focused on reducing overall energy demand (i.e. an energy efficiency or sufficiency approach) was slightly less popular than focusing on renewables, but more popular than the fossil fuel options – most (55%) ranked this option higher than both fossil fuel approaches.

² Note, however, that approximately half of our sample do not own a thermostat.

Figure 7. Participants' rankings of government approaches to help avoid future fuel shortages.



Conclusion

In May 2026, the impact of the fuel crisis prompted by the war in Iran appeared to have been translated more so into worry about energy security, rather than a large increase in worry about cost of living or energy expenditure over and above what people were already dealing with. All the same, over two in five people did report having changed their energy consumption in response to the crisis to save money. Reassuringly, the changes they reported making were mostly ones effective for managing costs (driving less and reducing heating rather than low impact measures like switching off lights).

Some of the changes people said they made were validated by the data we collected on behaviour – people with oil boilers were relatively less likely to use their heating in May than previous waves when compared with gas-heated homes. Interestingly, there was no change seen in the duration for which heating was used or thermostat settings, which is in line with our previous research that showed those more concerned about cost of living just avoid using heating in the first place rather than using other cost management techniques.³ While less of a concern in warmer months, people could benefit from more advice on how to lower their heating costs without having to go completely without, and from support in acquiring the tools to do so (e.g. providing vulnerable households with thermostats).

For travel behaviour, however, we did not find any changes in line with those people had reported making – the prevalence of car journeys is still extremely high and there is no evidence of modal shift among ICE vehicle owners, even for short journeys. There are several possible explanations for this discrepancy. By the time the survey was run in May, motor fuel prices had decreased somewhat from the peak of the crisis, so it may be that participants were describing changes they had made that they had since ceased. It is also possible that people were already making these efforts before the onset of the crisis, or simply that the changes they made were simply too small to add up to something meaningful on a population level. In any case, one change very few people did report making was driving more slowly to save fuel. Driving at 100 km/h rather than 120 km/h saves approximately 20% of fuel over the same distance. Getting this information across to people may be a straightforward way to help them save money, particularly in rural areas with poorer public transport or active travel infrastructure.

³ <https://www.seai.ie/data-and-insights/behavioural-insights/publications/bett-heating-report>

Interestingly, several participants mentioned having switched to an EV or having installed solar PV as a response to the fuel crisis. However, there doesn't seem to have been a drive towards heat pumps in the same way, with most participants still saying they would stick with what they know when they need to replace their heating system. It is worth noting, however, that a substantial proportion of people don't know what their next heating system will be, presenting an opportunity to get a large cohort to switch to a renewable system if adequately supported to do so.

Finally, our analysis reveals a clear mandate for the government to focus their policy approaches on expanding renewables to protect the country from future energy shocks. There was little appetite for an approach focused on strengthening fossil fuels within our energy mix in our nationally representative sample.