Residential Consumer Perceptions and Sentiment Survey

Wave 2, November 2026

Prepared for the Electricity Authority Te Mana Hiko

Report contents

- Executive Summary 3-4
- Confidence to Action (Model) 5
- Background 6
- Affordability and Protection 7-13
- Switching and Competition 14-23
- Efficiency and Engagement 24-29
- Security and Reliability 30-33
- Key Differences 34-37
- Appendix 38-41

EXECUTIVE SUMMARY

Residential consumer confidence is uneven across the key themes with some softening of confidence since 2025.

OVERALL CONFIDENCE

This report measures residential consumer confidence across the key themes of Affordability and Protection (*can I manage my bill, is help there if I need it*), Switching and Competition *(is the market working for me)*, Efficiency and Engagement (*do I understand and control my usage)*, and Security and Reliability (*will I have power today and in the long-term*).

The research shows that consumer confidence varies both across these key themes as well as within key themes. For example within Affordability and Protection, consumers are more confident they can afford their bill (51%), but less confident that help is available if they struggle to pay (26%). Likewise, within Security and Reliability most are confident the power will stay on today (59%), but fewer are confident future demand will be met (35%). Confidence in switching and competition (46%) and in efficiency and engagement (47%) are relatively consistent and sit in the middle. The research has also identified that some specific behaviours are highly correlated to aspects of consumer confidence. We have prepared a graphic (*see slide 5*) highlighting these relationships where they are statistically significant.

HOW TO READ THIS REPORT

Each score provided is based on the total of the top two sample percentages of the 5-point scale being used. For example, the confidence scale used in applicable survey questions ranges from *Not at all confident, Not very confident, Somewhat confident, Quite confide*nt and *Very confident*. For the purposes of reporting and comparing against previous waves, we use scores that combine the top two responses (i.e. the *Quite* + *Very confident* percentages). An asterisk (*) is used to indicate where a difference between 2025 and 2026 results is statistically significant.

WHAT CHANGED SINCE 2025 *(See slide 36)*

The overall story of change since 2025 is one of softening across at least one component of the four confidence themes. Where statistically significant, change has occurred it is in a downward direction.

Overall 10 measures showed a statistically significant movement (see appendix for details). Example of declines include perceptions of affordability, belief that companies are innovating and competing for consumers' benefit, consumer likelihood to switch, monitoring of usage and both the awareness of and the likelihood of trying any of the supply resilience options presented within the survey.

WHO LOOKS DIFFERENT *(see slide 35)*

Age and gender are the most consistent sources of difference across the survey. Younger consumers (18–34 years of age) are more likely to have sought support or been back-billed, but are also more confident they know where to find help and more open to time-of-use plans and resilience options. Those aged 65+ are the most settled group being the least likely to switch, but also the most satisfied and most engaged with their own usage. Women report lower confidence on affordability and reliability than men, while men report higher confidence in efficiency and engagement and greater awareness of support and resilience options.

Location differences also exist, though less broadly with rural consumers standing out on confidence in reliable supply being 28% points lower than elsewhere.

Base: n=1012 (Wave 2, 2026) / n=1005 (Wave 1, 2025), residential consumers, weighted.

Key takeaways by theme

Residential consumer confidence is uneven across the four themes - having softened since the previous survey. The likelihood a consumer will switch providers has also declined, although satisfaction with power companies has remained at 74%.

AFFORDABILITY and PROTECTION

Perceptions of bill affordability have declined, and the proportion of consumers who have sought support has fallen *(see slide 36)*

Overall perceptions of affordability are mixed with 41% describing their bill as at least quite affordable while 62% are confident they can afford their bill in the next 6 months. *(see slide 8)*

In contrast, consumers are less confident in knowing where to get help if they feel unfairly treated (27% at least quite confident) or that support to pay their bill is available (26% at least quite confident). *(see slide 8)*

SWITCHING and COMPETITION

Belief that power companies are innovating or competing for consumer benefits has fallen. Likelihood to switch in the next 12 months has fallen *(see slide 36)*

Over 60% of consumers are comfortable sharing their usage data, however less than half agree that shopping around is easy or that companies are competing for the benefit of consumers. *(see slide 17)*

Less than 40% are confident they have enough information to know which provider is the best, while likelihood to switch increases from 17% to 31% if provided with personalised usage information. *(see slide 18)*

EFFICIENCY and ENGAGEMENT

The proportion of consumers closely monitoring their power bill has fallen and there has been a decline in knowing which appliances use the most power *(see slide 36).*

Half of all residential consumers closely monitor their power use, while similar proportions understand their bill (47%), know which appliances use the most power (50%) and how to reduce their power costs (43%). *(see slide 27)*

SECURITY and RELIABILITY

Awareness of supply resilience options has fallen along with likelihood to try any listed supply resilience option *(see slide 36).*

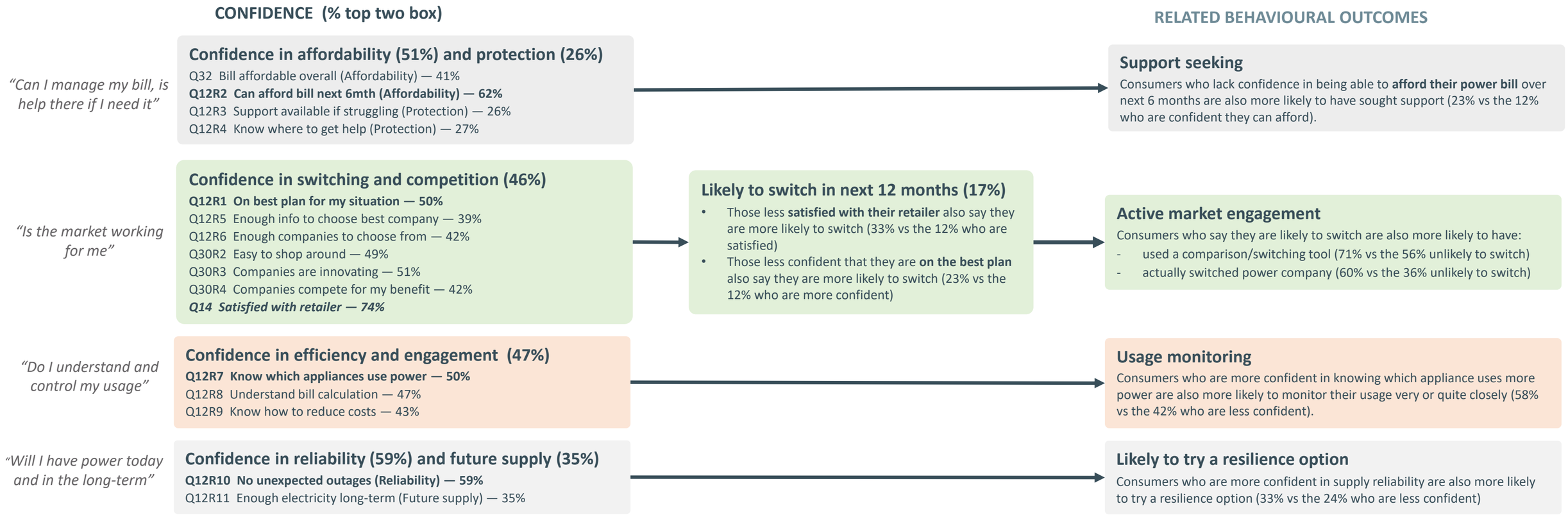
Confidence in today's reliability is high (59%) and far outpaces confidence in long-term supply (35%). Confident consumers are actually more open to trying a resilience option (+9 percentage points), yet only 29% overall say they're likely to try one, down from 40% in 2025.

RELATIONSHIP BETWEEN CONFIDENCE AND OUTCOMES

Consumer confidence moves with key outcome behaviours.

This chart lists the confidence measures for each theme (% top two box) and links them to the behaviours they are associated with. Only relationships that are statistically significant (p<.05) are shown, so not every confidence measure has a link. Bold items are those that drive the relationship shown. The relationships are correlations only and do not describe cause and effect.

- **Confidence in affordability:** those less confident they can afford their bill in the next 6 months are also more likely to have sought support.
- **Confidence in switching and competition:** those less confident they are on the best plan as well as those who are less satisfied with their retailer are more likely to switch. Those more likely to switch in the next 12 months are also more likely to have switched in the past and more likely to have used a comparison tools and switching.
- **Confidence in efficiency and engagement:** those more confident in knowing which appliances use the most electricity are slow more likely to monitor their usage closely.
- **Confidence in reliability:** Those more confident in reliability are more likely to try a resilience option with motivations largely centred around cost savings.



Base: n=1012 (Wave 2, 2026), residential consumers, weighted to Stats NZ population estimates. Confidence % = top two (quite/very confident) for a single item, or the mean top two across a theme's item set where multiple items are shown. Outcome and driver %s compare the top two-confident/intending group against the bottom group on the bolded item (Unsure excluded from both groups). For example in the Affordability & Protection row, the link to Support-seeking is driven by the Affordability item (Q12R2). All relationships shown are significant at p<.05.

BACKGROUND

Methodology

- An online survey was conducted with a sample of the New Zealand adult population, with quotas set on key demographics. Respondents were screened for involvement in paying or deciding on their household power bill. Those who qualified (residential household bill payers and decision makers) completed the full survey; those who did not were excluded from the results. The results therefore represent the bill-paying cohort, not the whole population.
- Wave 1 (2025) n=1,005 was conducted between 14 July and 6 August 2025. Wave 2 (2026) n=1,012 was conducted between 8 July and 29 July 2026.
- Both samples were weighted to the profile of the bill-paying cohort (age, gender, region, ethnicity, urban/rural).
- All percentages shown are weighted. Base sizes (n) in each slide footer are unweighted respondent counts. Percentages may not add to 100% due to rounding.
- Wave-on-wave movement is tested using a two-proportion z-test at 95% confidence, with sample sizes adjusted for the design effect of weighting (effective n). Slides are flagged as significant with an * only where $p<0.05$.
- Demographic and location differences: each measure has been tested for significant differences by age (18–34 / 35–64 / 65+), gender, region (8 groups) and urban/rural (5 groups), using Wave 2 (2026) data.

Affordability and Protection

How residential consumers feel about the cost of power, their ability to afford their bill over the next 6 months and their confidence in support if they need help or struggle to pay.

Q12R2/3/4

While perceptions of affordability have declined, most are at least quite confident they can afford to pay their bill over the next 6 months. However confidence in where to find help and support is low.

Q32: "How affordable is your power bill?"

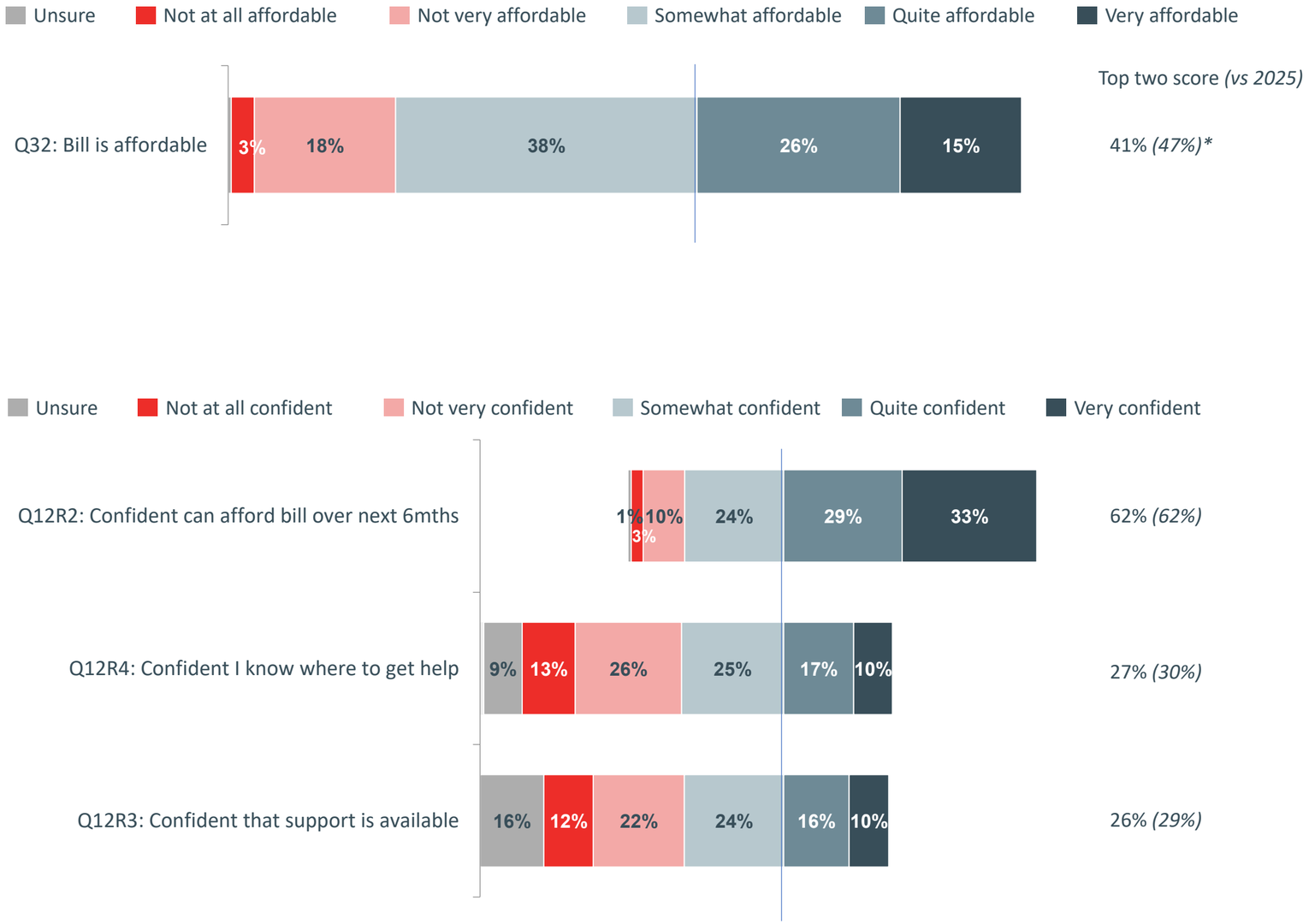
Q12R2: "I'll be able to afford my power bill over the next 6 months"

Q12R3: "There is support available if I'm struggling to pay my power bill"

Q12R4: "I know where to get help if my power company treats me unfairly"

Overall perceptions of bill affordability is mixed with 41% describing their bill as at least quite affordable. In contrast, the majority (62%) of residential consumers feel at least quite confident that they can afford their power bill over the next six month (these two measures are highly correlated).

In contrast, consumers are less confident in knowing where to get help if they feel unfairly treated (27% at least quite confident) or that support to pay their bill is available (26% at least quite confident).



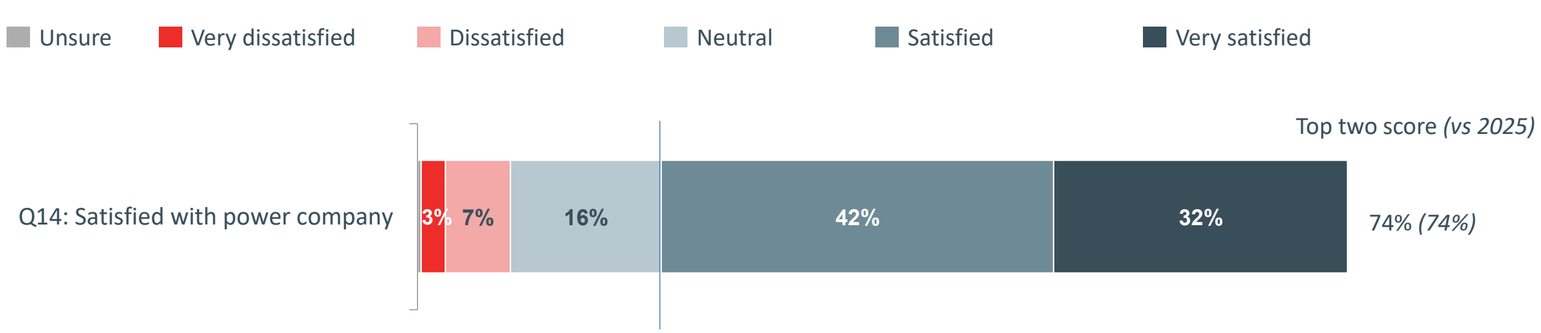
Base: n=1012 (Wave 2, 2026), residential consumers. * Significantly different

Q14/32

Nearly three-quarters of consumers are satisfied with their power company.

Q14: "How satisfied are you with your power company?"

Most residential consumers are satisfied with their power company (74%), unchanged from 2025.



Base: n=1012 (Wave 2, 2026), residential consumers, weighted.

Q15

Perceptions of price and value are the key determinants of consumer satisfaction.

Q15 Open responses: “And why do you feel that way? (How satisfied with your power company)”

58% of respondents gave a specific positive theme while 24% gave a specific negative theme

Negative sentiment is overwhelmingly about price with 22% highlighting cost, more than 14x any other negative theme. Positive sentiment is more varied spanning price, reliability, perks, service and tenure.

WHAT THEY LIKED

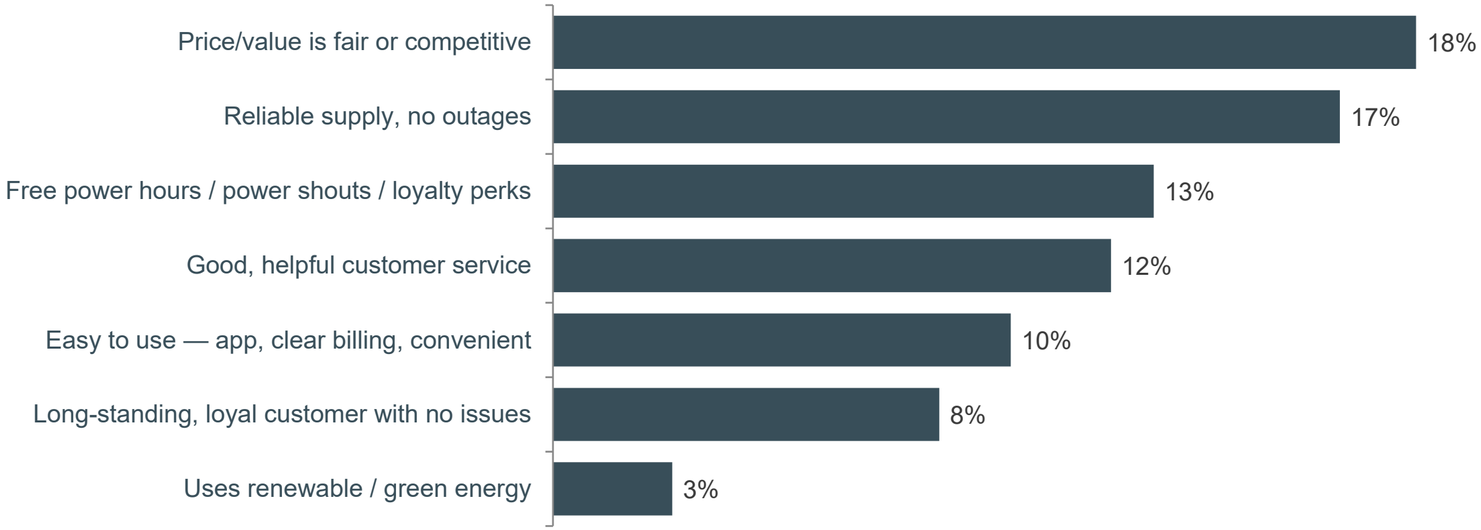
"Never had any issues."

"Free power weekends is a bonus."

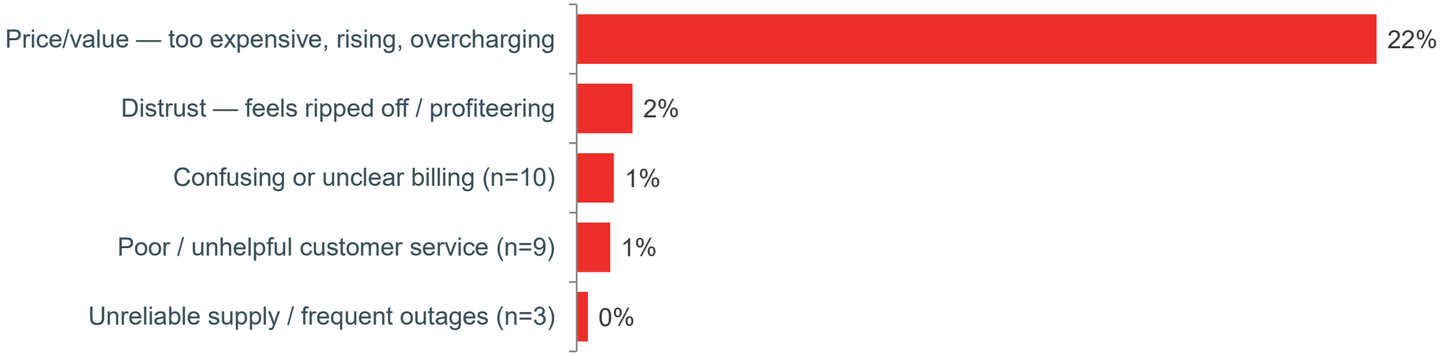
WHAT FRUSTRATED THEM

"The price of electricity keeps going up and up."

POSITIVE THEMES



NEGATIVE THEMES



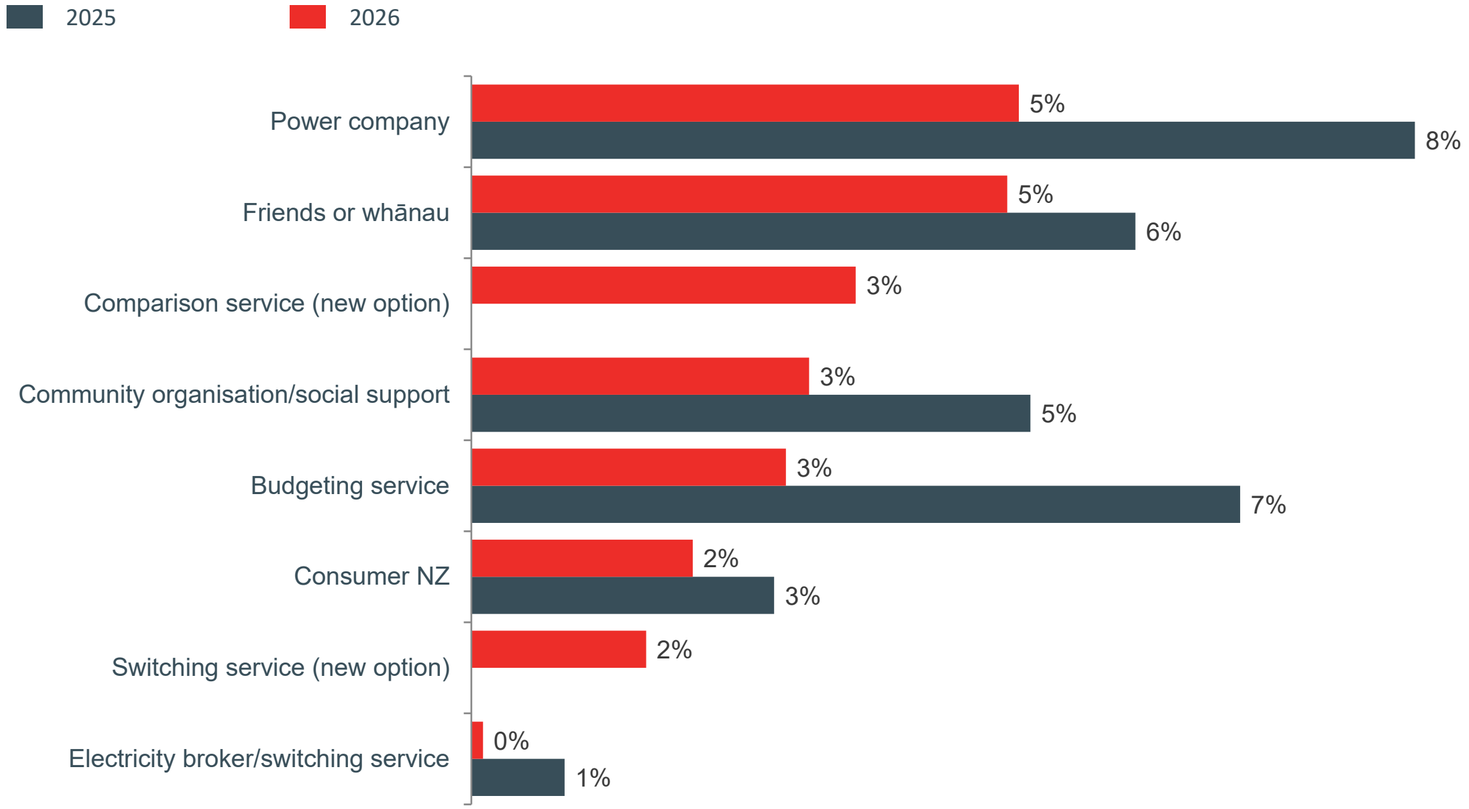
Base: n=1012 Wave 2 (2026) open-text responses to Q15, coded into themes

Q33

16% of consumers claim to have ever sought support, with most turning to their power company or family.

Q33: "Have you ever sought support to help manage your power bills or account?"

Overall 16% claim to have sought support with help managing power bills. This is a decline from 20% last year. (Note: Comparison and switching services are new response options added in Wave 2).



Base: n=1005 (Wave 1, 2025) / n=1012 (Wave 2, 2026), residential consumers

NEW2/NEW3

Only 7% have complained about their power company with a quarter aware of Utilities Disputes Limited.

QNEW2: "Have you ever needed to make a complaint about your power company? Who to?"

QNEW3: "Are you aware of Utilities Disputes Limited?".

QNEW2.2: "If you needed to make a complaint, where would you go to seek help?" (base: all respondents, multi-select)

Only 7% have needed to make a complaint with most (81%) complaints being made directly to the power company.

If needing to complain, most (74%) would go to their power company, while 23% would go to Utilities Disputes Limited (noting a quarter of consumers are also aware of Utilities Disputes Limited).

Compared to small business consumers, a lower proportion of residential consumers have made a complaint (-3%), and a lower proportion of residential consumers are aware of Utilities Disputes Limited (-7%)

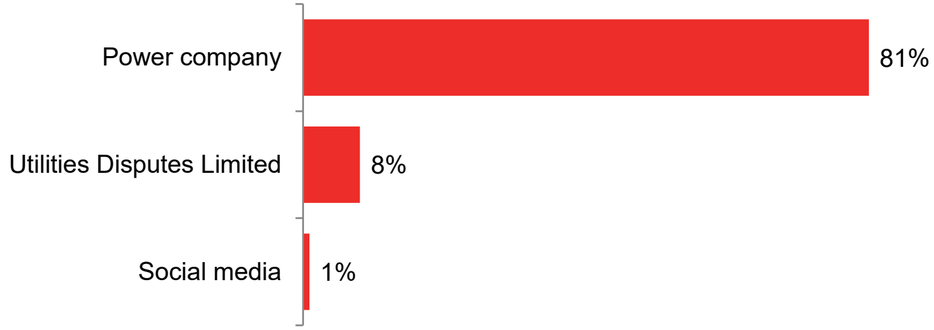
Have made a complaint

7% Yes

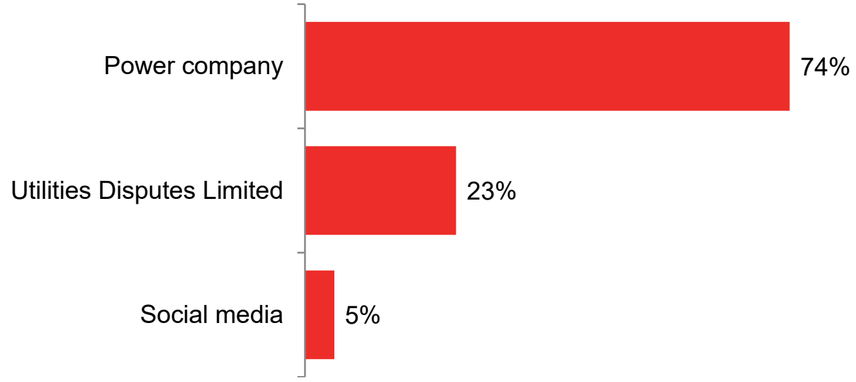
Aware of Utilities Disputes Limited

25% Yes

Who was the complaint made to? (amongst those who complained)



If you needed to make a complaint, where would you go..



Base: n=1,012 (Wave 2 only, 2026). Complaint channel base: those who have made a complaint.

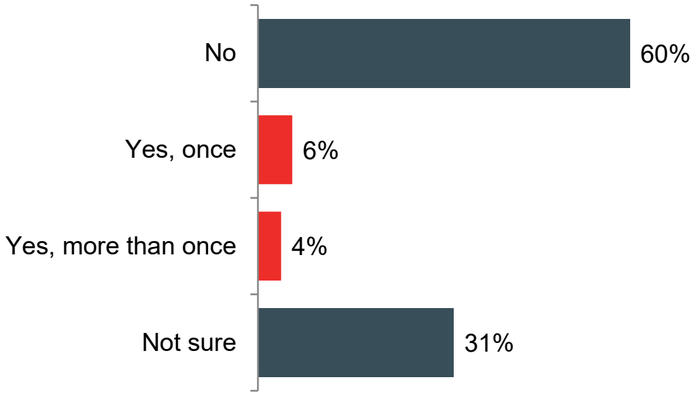
NEW4/NEW4X1

Around 1 in 10 consumers have received a back-billed charge, with disclosure quality being mixed.

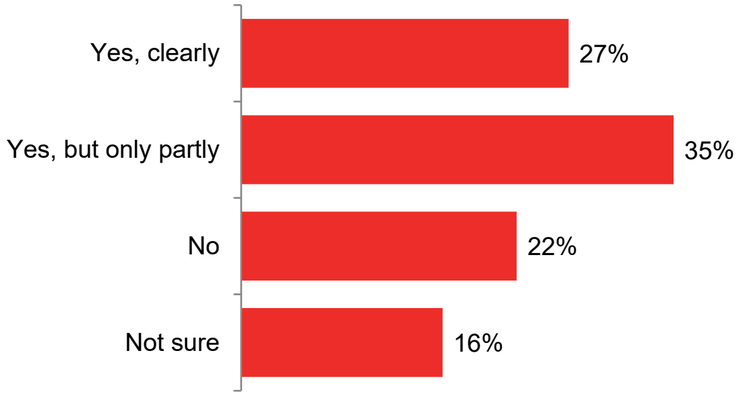
QNEW4: "In the last 12 months, have you received an electricity bill that included charges for electricity you used in an earlier billing period?"

9%* of consumers received a back-billed charge (once or more than once). Among them, only 27% say their retailer clearly disclosed the amount, period, and payment options.

Received a back-billed charge in last 12 months (all consumers)



Retailer clearly disclosed amount/period/no-interest option (of those who had a back-billed, n=90)



Base: n=1,012 (Wave 2 only, 2026); question base n=90 (received a back-bill). *does not match the charted number due to rounding

Switching and Competition

Consumer confidence in the market, switching behaviour, and the role of information in driving action

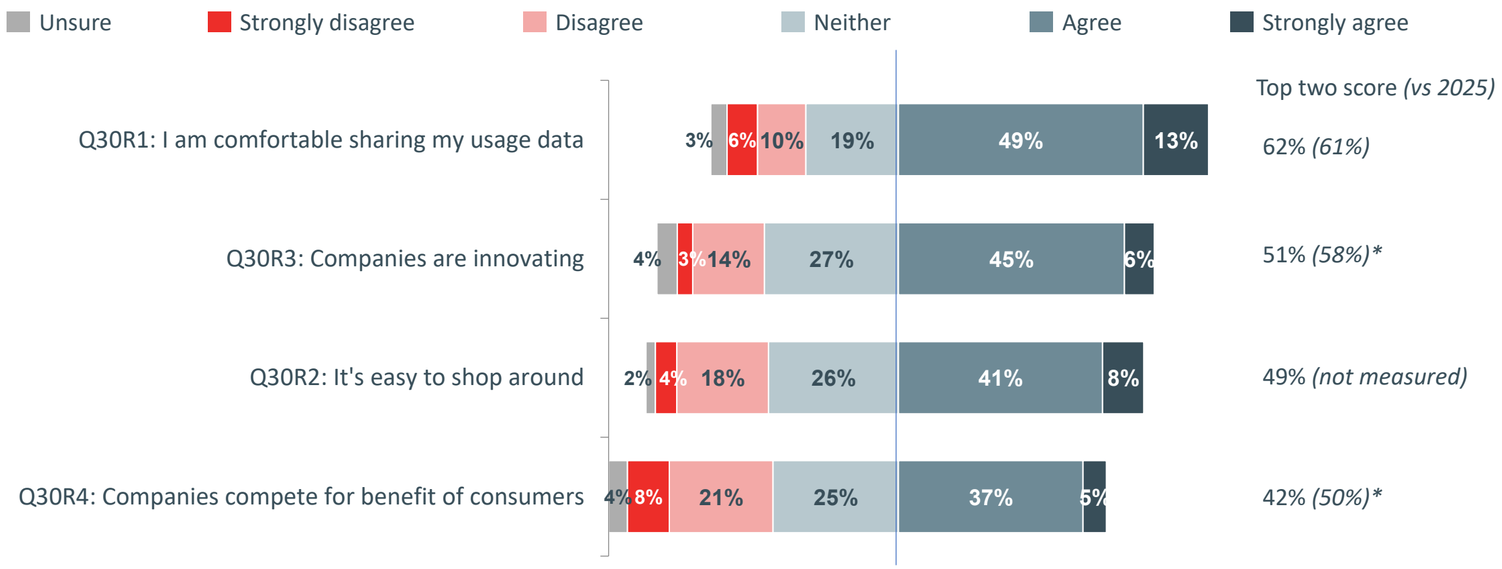
Q30

Over 60% of consumers are comfortable sharing their usage data, however, less than half agree that shopping around is easy or that companies are competing for the benefit of consumers.

In 2026 residential consumers are less likely to agree that power companies are innovating by offering new tools and apps, better services and more options for plans (51% vs. 58%) or competing for the benefit of consumers through better prices, quality of service and products (42% vs. 50%).

Despite this weakening perception of the market, most consumers remain comfortable (62%) in sharing their usage data with trusted, authorised third parties for a better price or service.

Around half of all residential consumers agree that it is easy to shop around (a new measure for 2026).



Base: n=1012 (Wave 2, 2026), residential consumers, weighted. * significantly different

Q12R1/5/6
Q23/24

Less than 40% are quite or very confident they have enough information, while likelihood to switch increases from 17% to 31% if consumers are provided with personalised savings information.

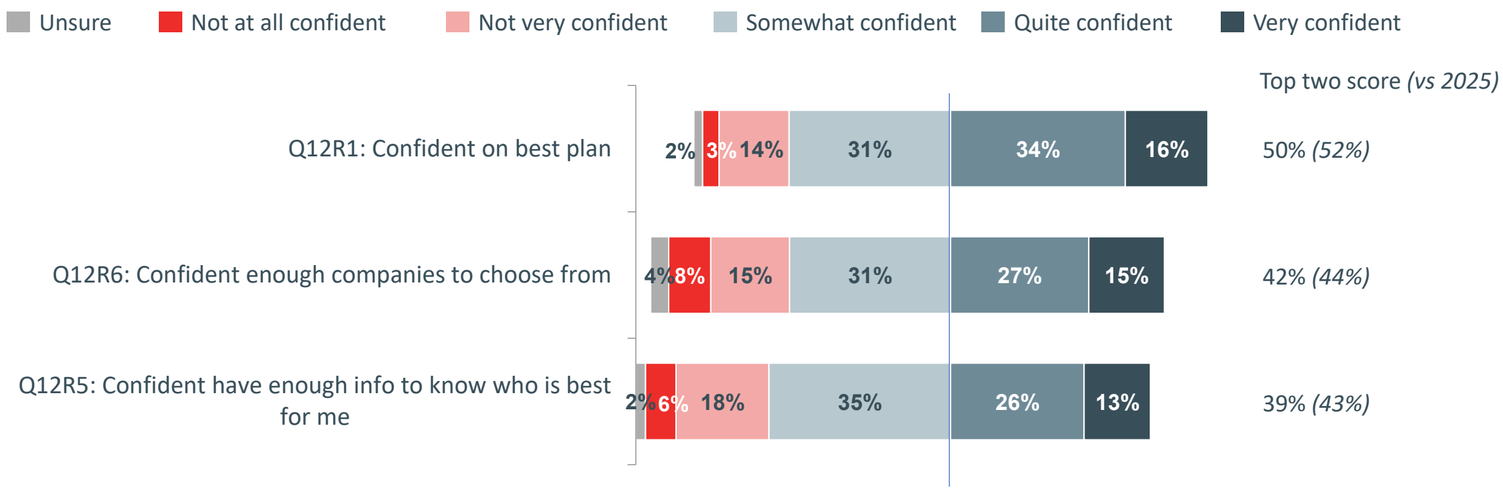
Half of all consumers are confident they are on the best plan (with 81% being at least somewhat confident). Meanwhile 17% are likely to switch in the next 12 months (a statistically significant decline since 2025).

The important role of personalised saving information is highlighted whereby likelihood to switch almost doubles from 17% to 31% if this type of information is provided.

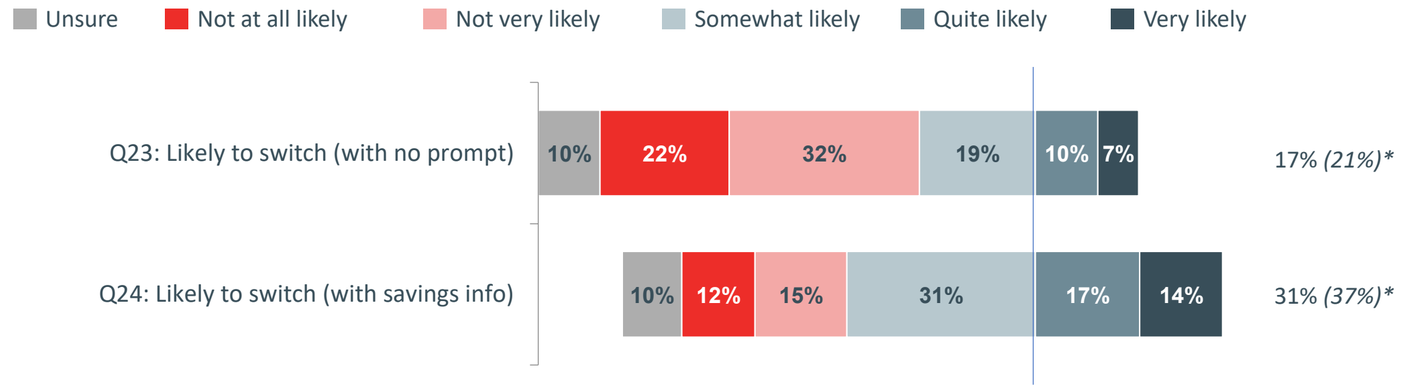
Critically only 39% are at least quite confident that they have enough information to know which power company is best for them.

Satisfaction with the retailer is the dominant driver of switching intent (dissatisfied consumers are almost 3 times more likely to switch than satisfied consumers). Confidence in being on the best plan is also important. Together, dissatisfied consumers and consumers who are not confident that they are on the best plan are nearly four times as likely to switch (40%), compared to consumers who are satisfied or are confident they are on the best plan.

CONFIDENCE IN THE MARKET



LIKELIHOOD TO SWITCH NEXT 12 MONTHS



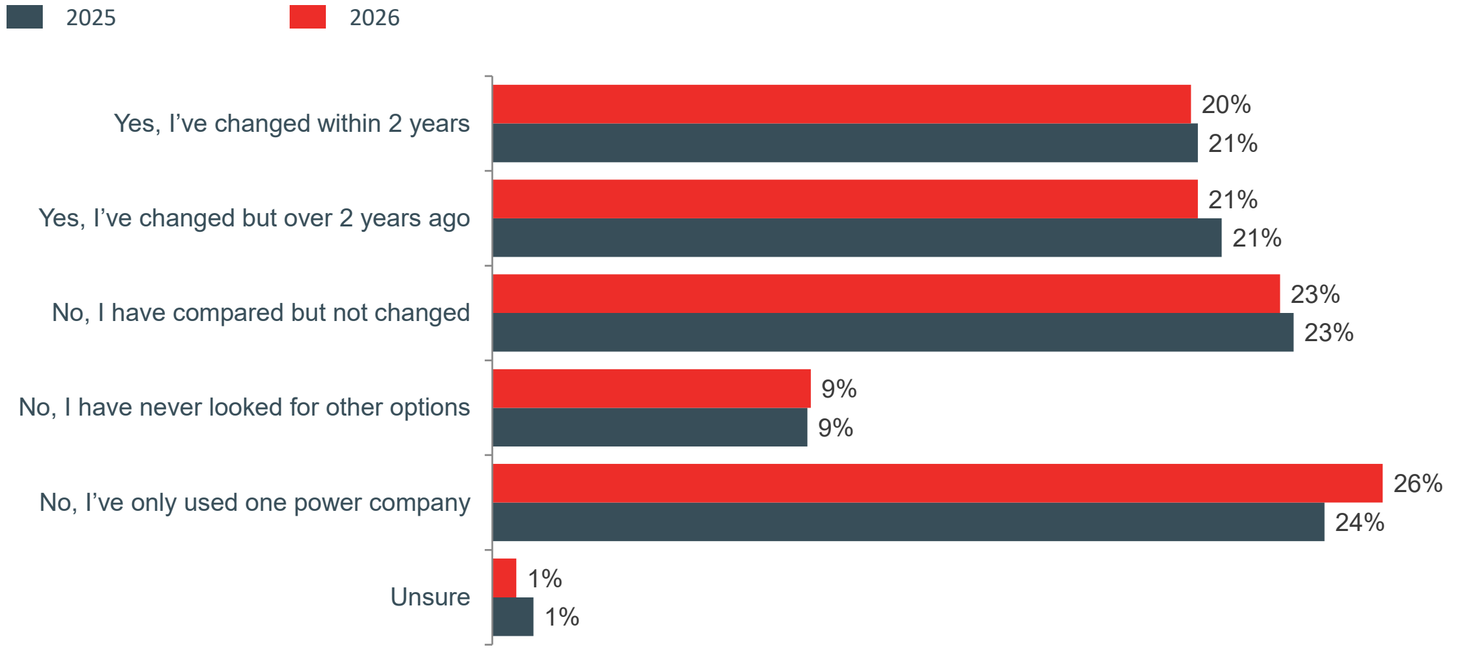
Base: n=1012 (Wave 2, 2026), residential consumers, weighted. * significantly different

Q21

One in five consumers report switching provider within the last 2 years and this is unchanged since 2025.

Q21: "Have you changed your power company?"

20% of residential consumers have switched within the last 2 years with reported switching behaviour unchanged from the last wave in 2025.



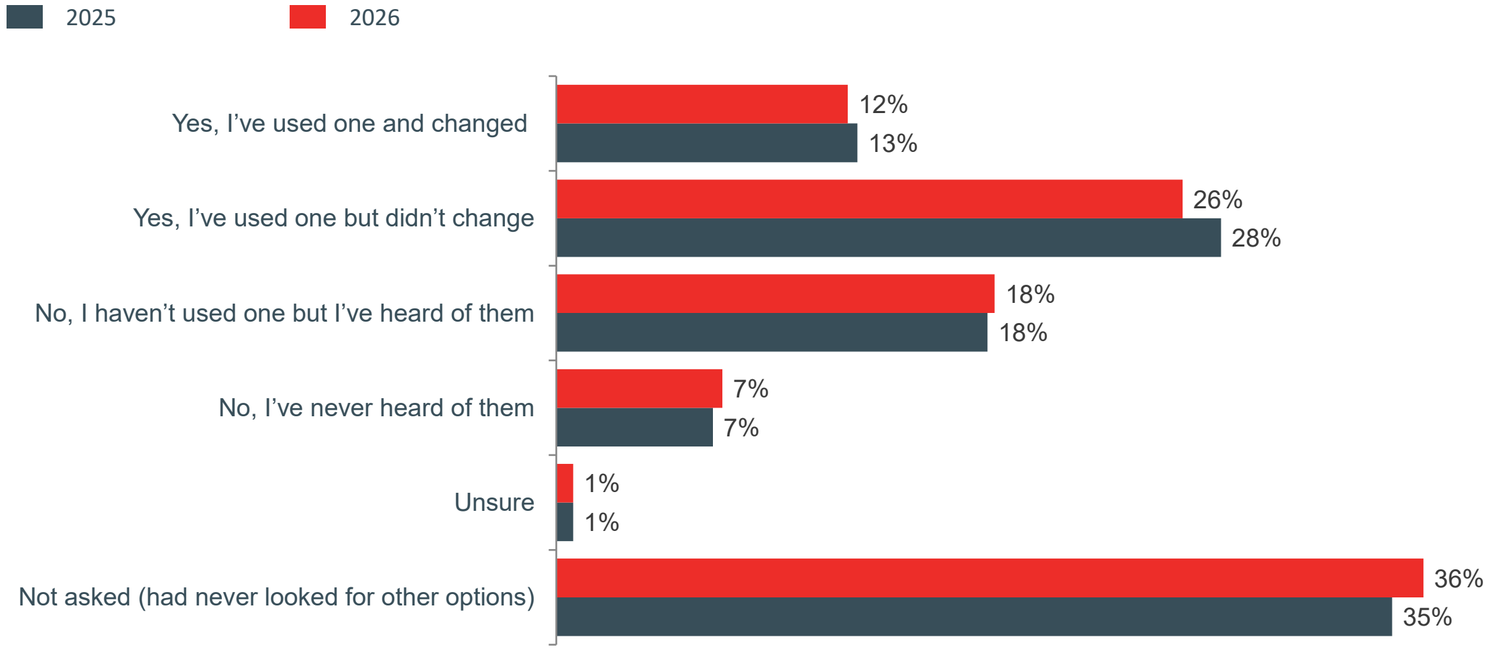
Base: n=1005 (Wave 1, 2025) / n=1012 (Wave 2, 2026), residential consumers, weighted.

Q27

38% of all residential consumers claim using a comparison tool, and this is unchanged from 2025.

Q27: "Have you ever used a power company comparison and switching service?"

12% of all residential consumers have used a comparison or switching service and ended up changing providers, while 26% have used one but didn't change retailers.



Base: n=1005 (Wave 1, 2025) / n=1012 (Wave 2, 2026), residential consumers, weighted.

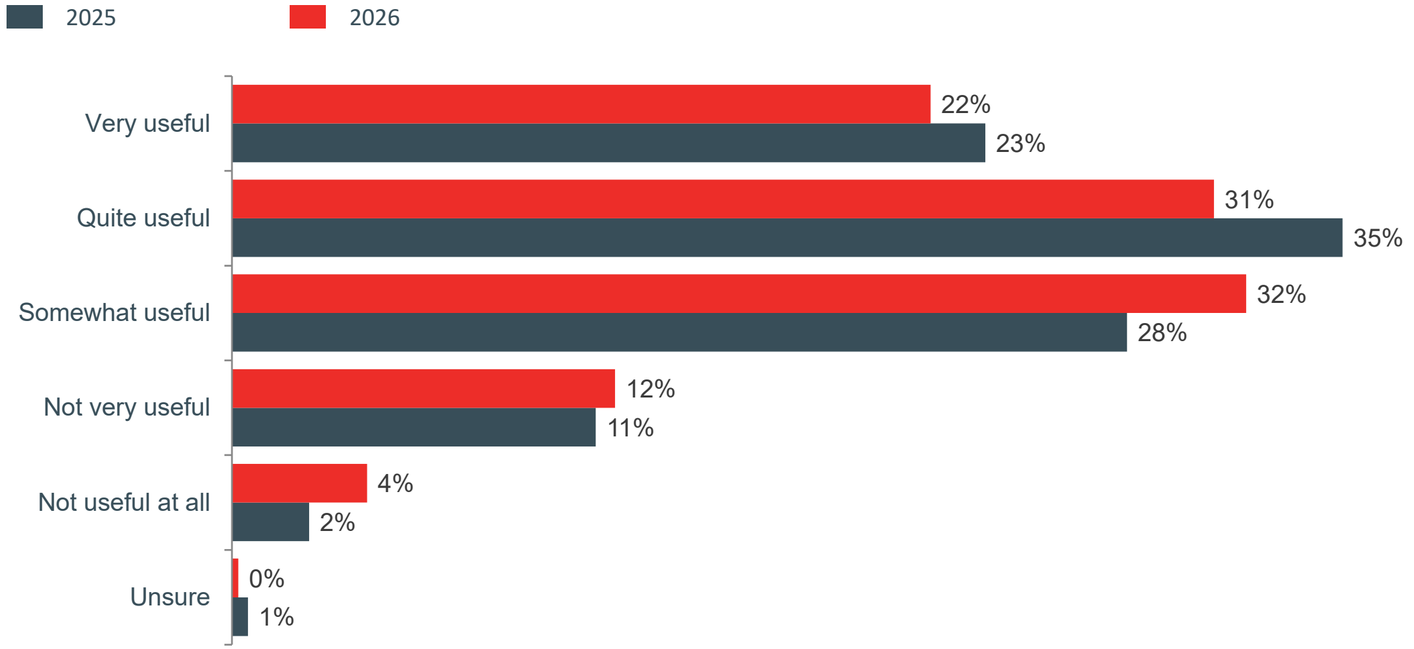
Q28

Most users of switching tool found them at least somewhat useful (85%).

Q28: "How useful did you find the comparison and switching service?" (of those who have used one)

Only a relatively small proportion of users felt the tool was not very (12%) or not at all useful (4%).

There was no change in perceptions of usefulness since the last wave in 2025.



Base: n=408 (Wave 1, 2025) / n=397 (Wave 2, 2026), residential consumers, weighted.

Q29

The switching tool's biggest barrier is doubt that it will save money.

Q29: "Why was the comparison and switching service not very or quite useful for you?"

Of the 48% of consumers that rated the service somewhat useful or less, about a third saw no real saving, already knew they were on the best deal, or found the alternative more expensive.

A quarter found the tool itself hard to use or not like-for-like.

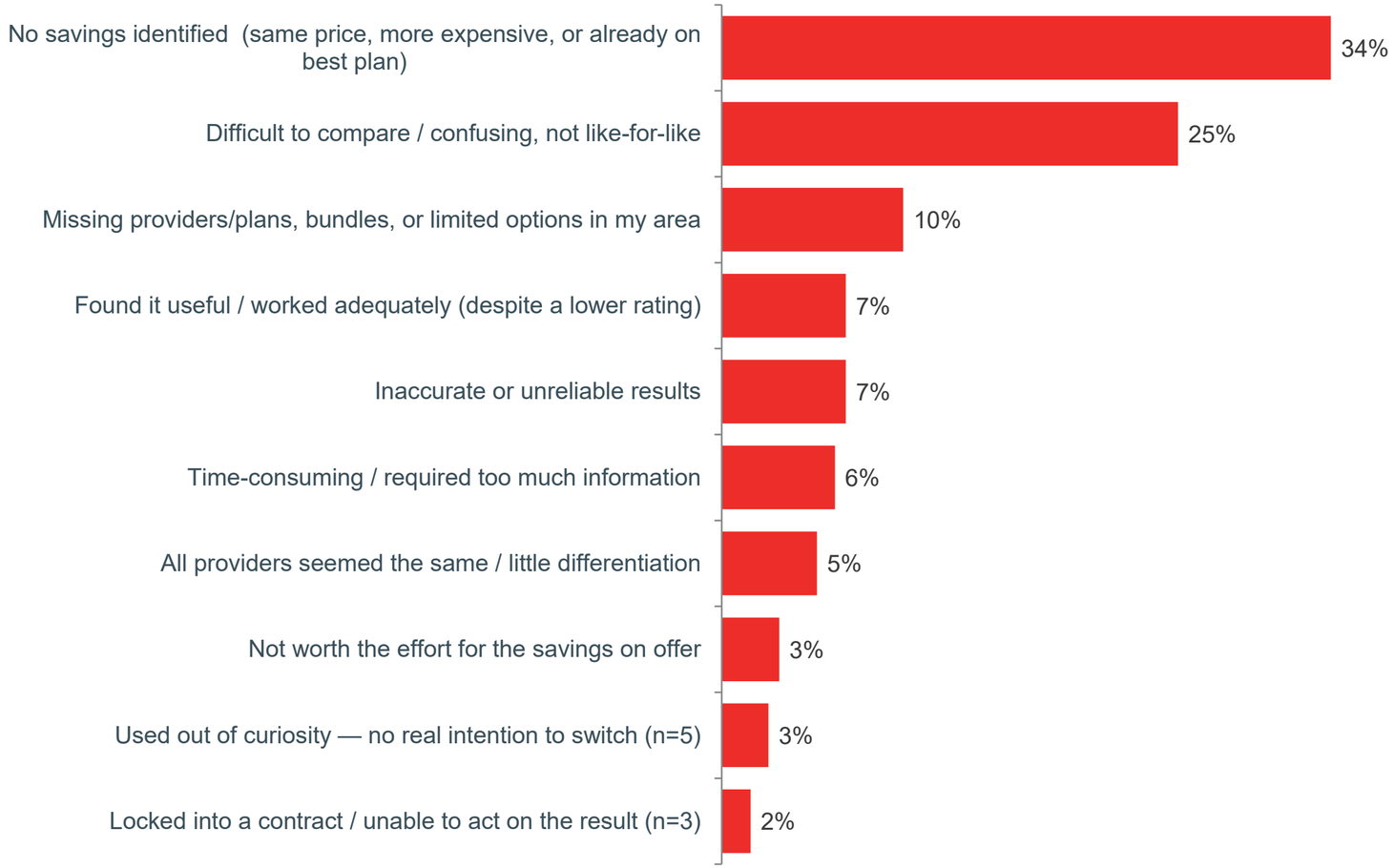
ON SAVINGS

"It all evened out in the end and the comparison didn't make any difference."

ON USABILITY

"Once I put all my info in, it was hard to understand what I was looking at, it didn't give me a straight-up answer about which company had the best deal."

REASONS THE SERVICE WASN'T USEFUL (n=189)



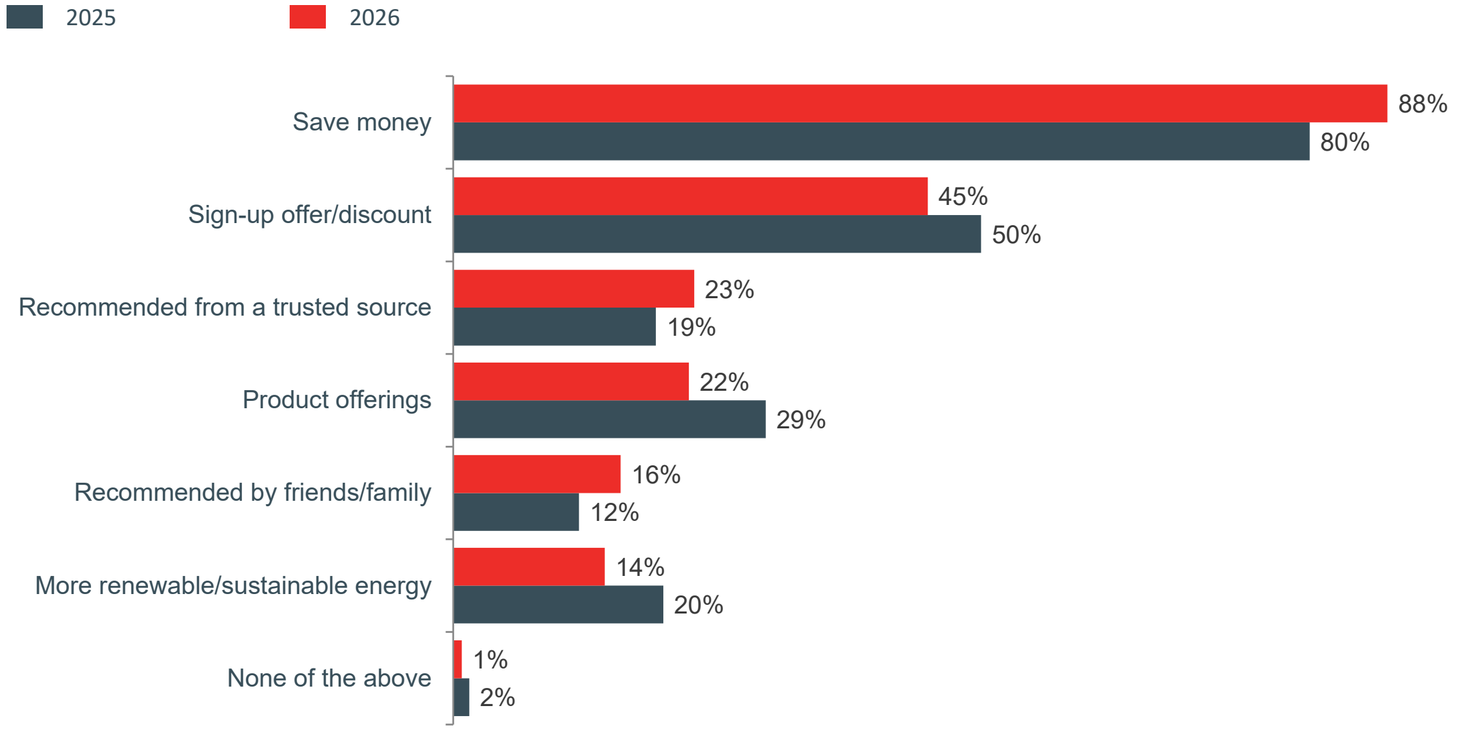
Base: those rating the tool 3-5 out of 6 on usefulness (n=189, Wave 2 2026 only).

Q25

Among *those likely* to switch, the promise of saving money matters even more than in 2025.

Q25: "What are the main reasons you are likely to change power companies in the next 12 months?" (of those likely to switch; note this is a multi-choice question)

As a reason to switch, *saving money* rose to 88% while *product offerings* fell to 22% from 29% last wave.



Base: n=1005 (Wave 1, 2025) / n=1012 (Wave 2, 2026), residential consumers, weighted.

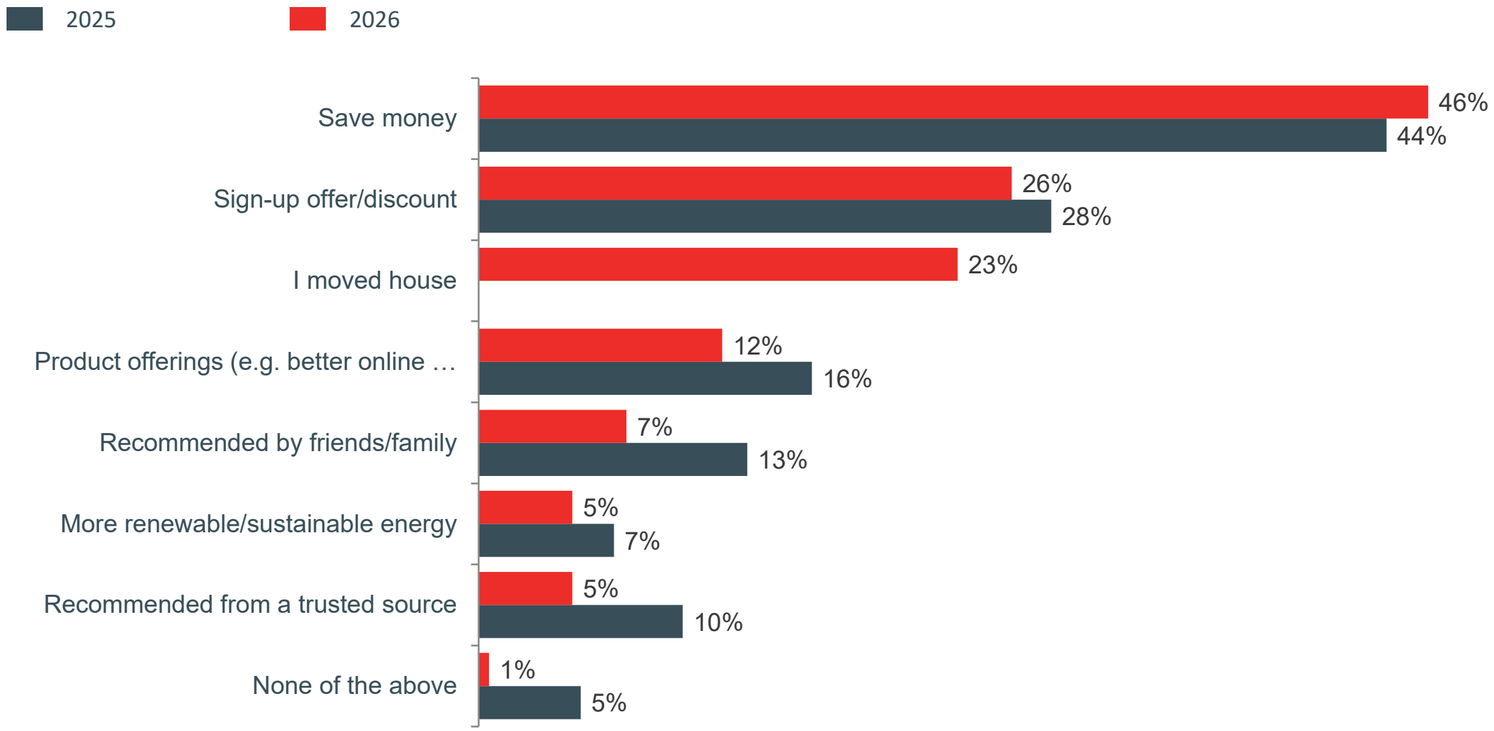
Q22

Among *recent switchers,* saving money and access to discounts and sign-up offers are the main reasons people switch.

Q22: "What were the main reasons you decided to change power companies?" (of recent switchers).

This wave, those claiming to switch due to recommendations either by friends/family or a trusted source both fell.

'I moved house' is a new option in Wave 2.



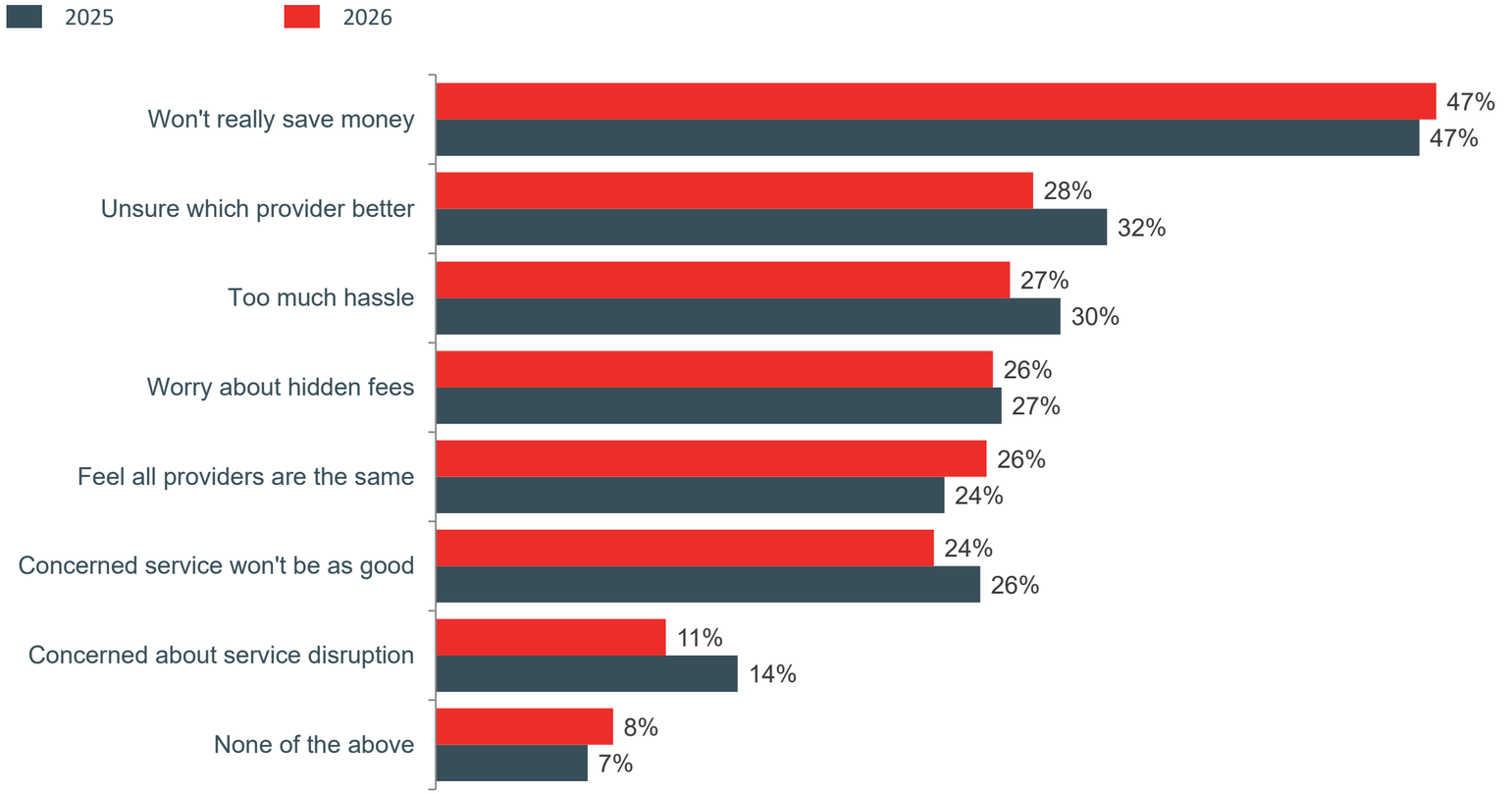
Base: Switchers only n=431 (Wave 1, 2025) / n=417 (Wave 2, 2026) unweighted.

Q26

Doubt about saving money is the main barrier to switching and is unchanged since 2025.

Q26: "What are the main reasons you are not very likely to change power companies?" (base: unlikely to switch, multi-select)

Doubt that switching would really save money remains the top barrier in both waves. None of the seven barriers measured moved since wave 1.



Base: Unlikely switchers: n=618 (Wave 1, 2025) / n=696 (Wave 2,2026) unweighted.

Efficiency and Engagement

How closely consumers monitor and manage their power use, and uptake of time-of-use plans and bundling

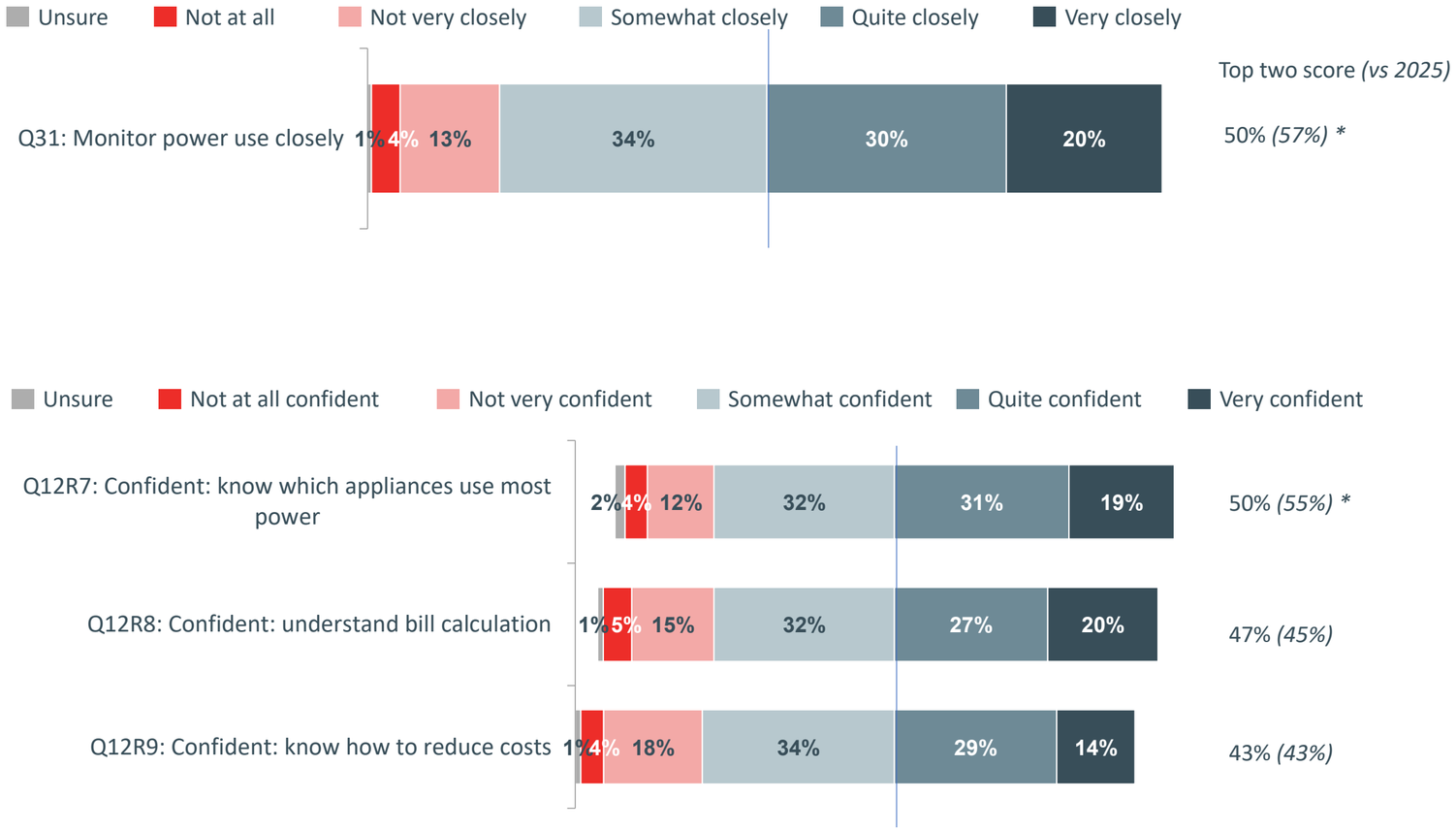
Q31 and Q12R7/8/9

Half of all residential consumers closely monitor their power use, while similar proportions understand their bill (47%), know which appliances use the most power (50%) and how to reduce costs (43%).

The proportion of consumers monitoring their power use (quite or very closely) has fallen since 2025 from 57% to 50% in 2026.

This decline is also reflected in a fall in knowledge of which appliances use the most power in the household, with confidence falling from 55% to 50% this wave.

Just under half of consumers feel quite or very confident that they understand how their bill is calculated (47%) and how to reduce household power costs overall (43%). These figures are unchanged from 2025.



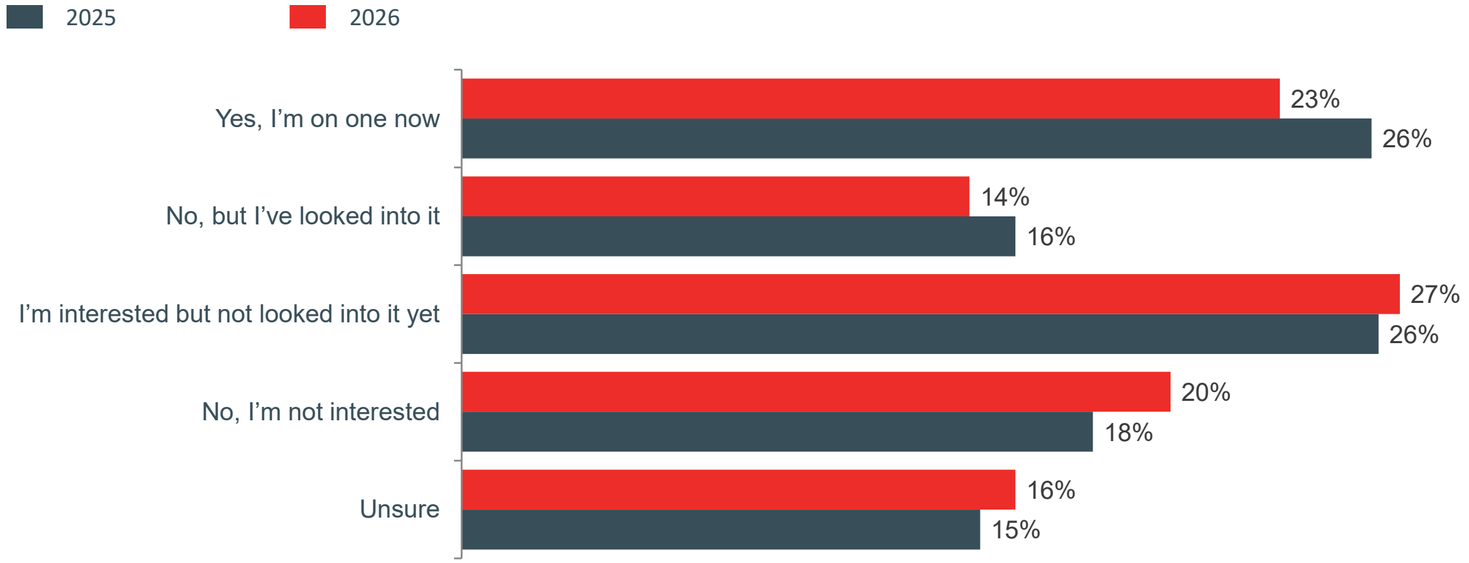
Base: n=1012 (Wave 2, 2026), residential consumers, weighted. * significantly different

Q18

Almost a quarter claim they are on a time-of-use plan (23%) while a further 41% have shown some interest.

Q18: time-of-use (TOU) plan status.

While there are no changes since 2025, time of use plans are being noticed by residential consumers (41% either investigating or interested), with only 36% being unsure or uninterested in this type of plan.



Base: n=1005 (Wave 1, 2025) / n=1012 (Wave 2, 2026), residential consumers, weighted.

Q19

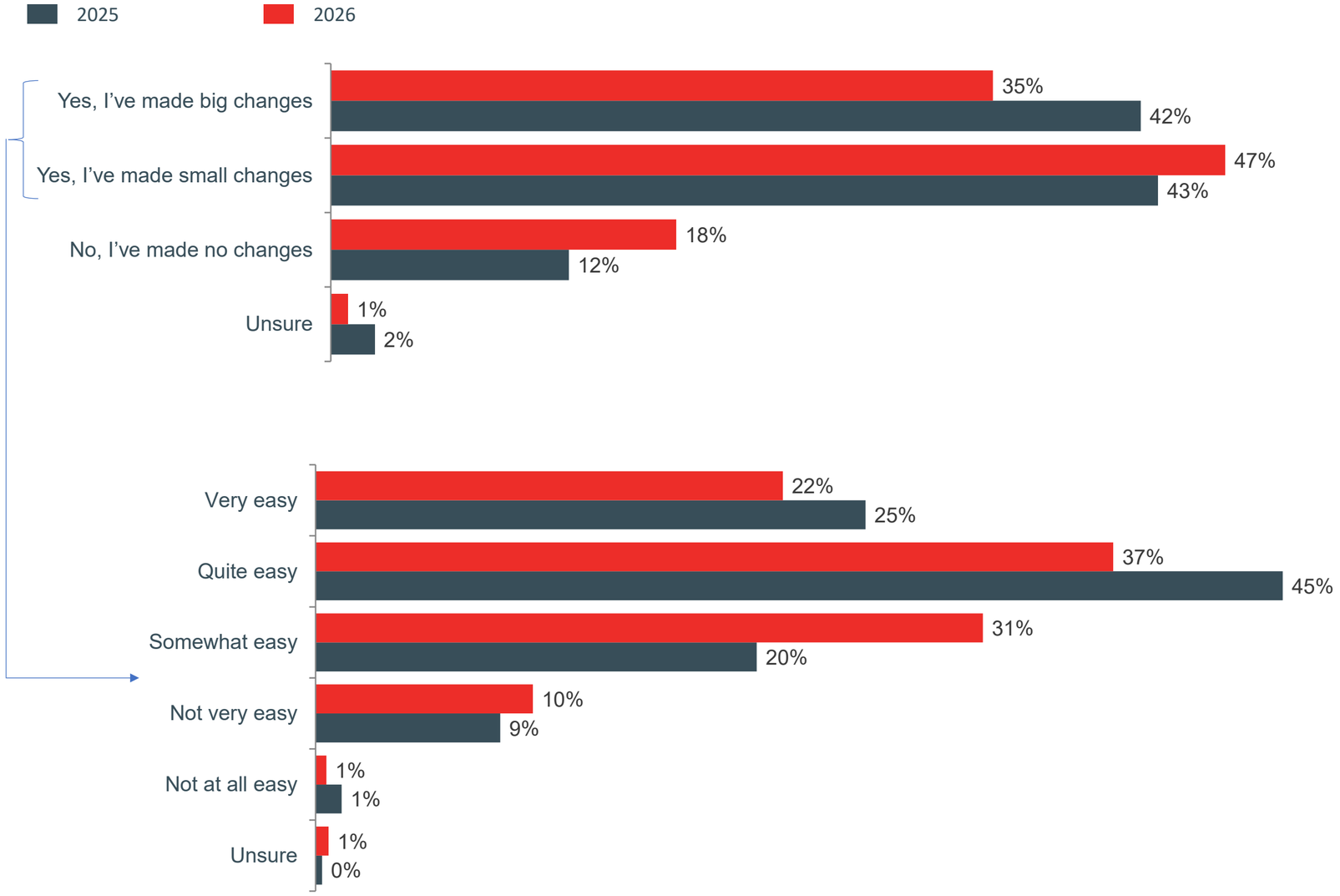
Most (81%) time-of-use plan users have changed behaviour and most of these (59%) found it easy to do so.

Q19: "Since starting a time-of-use power plan, have you changed how or when you use electricity?" (of consumers on a TOU plan)

The majority (81%) of those on a time-of-use plan have made at least some changes to how or when they use electricity.

Q20: "How easy has it been to change when you use electricity to make the most of your time-of-use plan?" (of those consumers on a TOU plan and have made changes)

Of those making a change, overall ease (very or quite) of changing when power is used fell from 70% to 59%.



Base: Q19 n=263 (Wave 1, 2025) / n=237 (Wave 2, 2026); Q20 n=225 (Wave 1, 2025) / n=192 (Wave 2, 2026), residential consumers, weighted.

NEW1

Saving money is the key driver of behaviour change, comfort with current habits is the main reason not to.

NEW1: "What is the main reason for you changing (or not changing) your usage behaviour?" Split by Q19 (whether the respondent reported changing usage on their TOU plan).

Those who change their usage are overwhelmingly cost-driven; shifting laundry, dishwashing and heating to free or off-peak hours to save money.

Those who didn’t change aren't struggling to-do so. Most simply feel they're already efficient or are satisfied with their bill as it is.

WHY THEY CHANGED

"To save money on power."

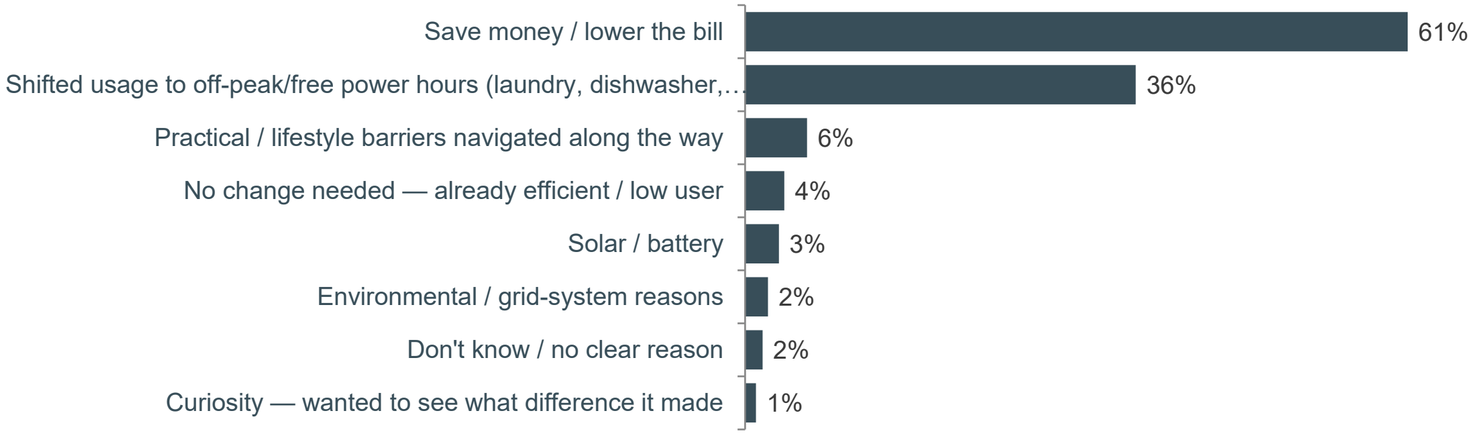
"We do a lot of washing at night, and use the dryers, and dishwasher."

WHY THEY DIDN'T

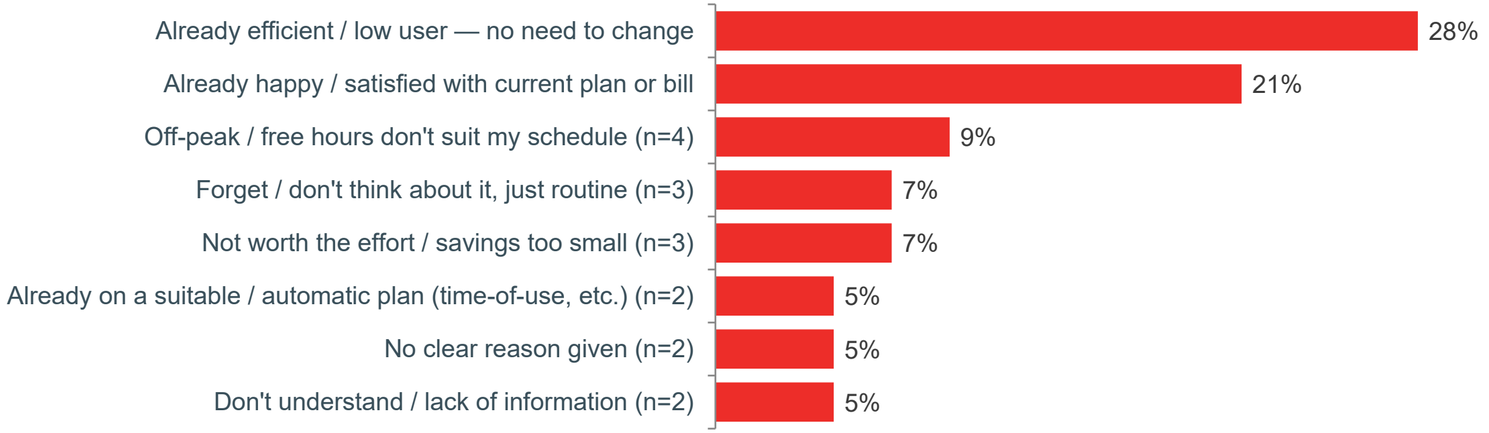
"I am happy with my bill."

"Don't think the savings are worth changing your lifestyle for. Too insignificant."

REASONS THEY CHANGED THEIR USAGE (n=192)



REASONS THEY DID NOT CHANGE (n=43)



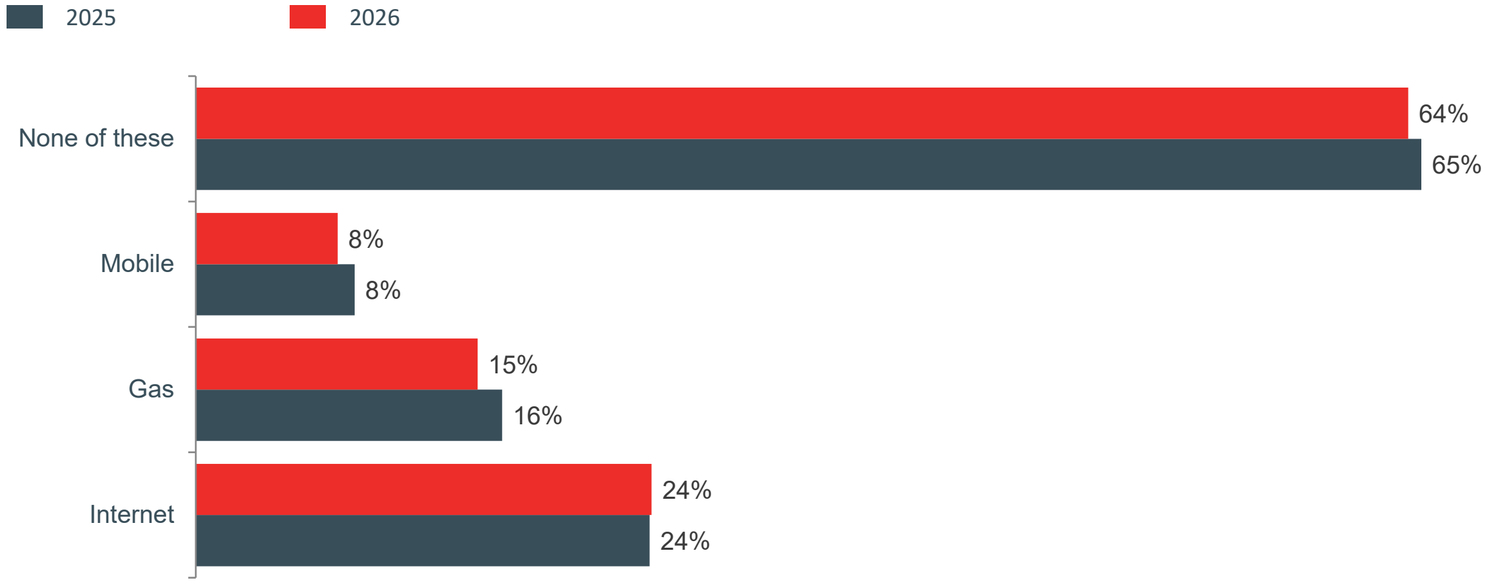
Base: Wave 2 (2026), NEW1 open-text verbatims split by Q19 ("How easy has it been to change usage..." routing: Yes big/small changes vs No changes; n=2 Unsure excluded).

Q16R1–R4

Roughly a third (36%) of all consumers bundle power with at least one other service.

Q16: "Do you receive any of the following services from your power company?" (multi-select).

Internet is the most commonly bundled service followed by gas and mobile. No bundling category moved since 2025.



Base: n=1005 (Wave 1, 2025) / n=1012 (Wave 2, 2026), residential consumers, weighted.

Security and Reliability

Confidence in future supply and outage resilience

Q12R10/11 and Q37

Confidence in immediate supply is strong. However, consumers are less certain about the future and intent to try resilience options has weakened.

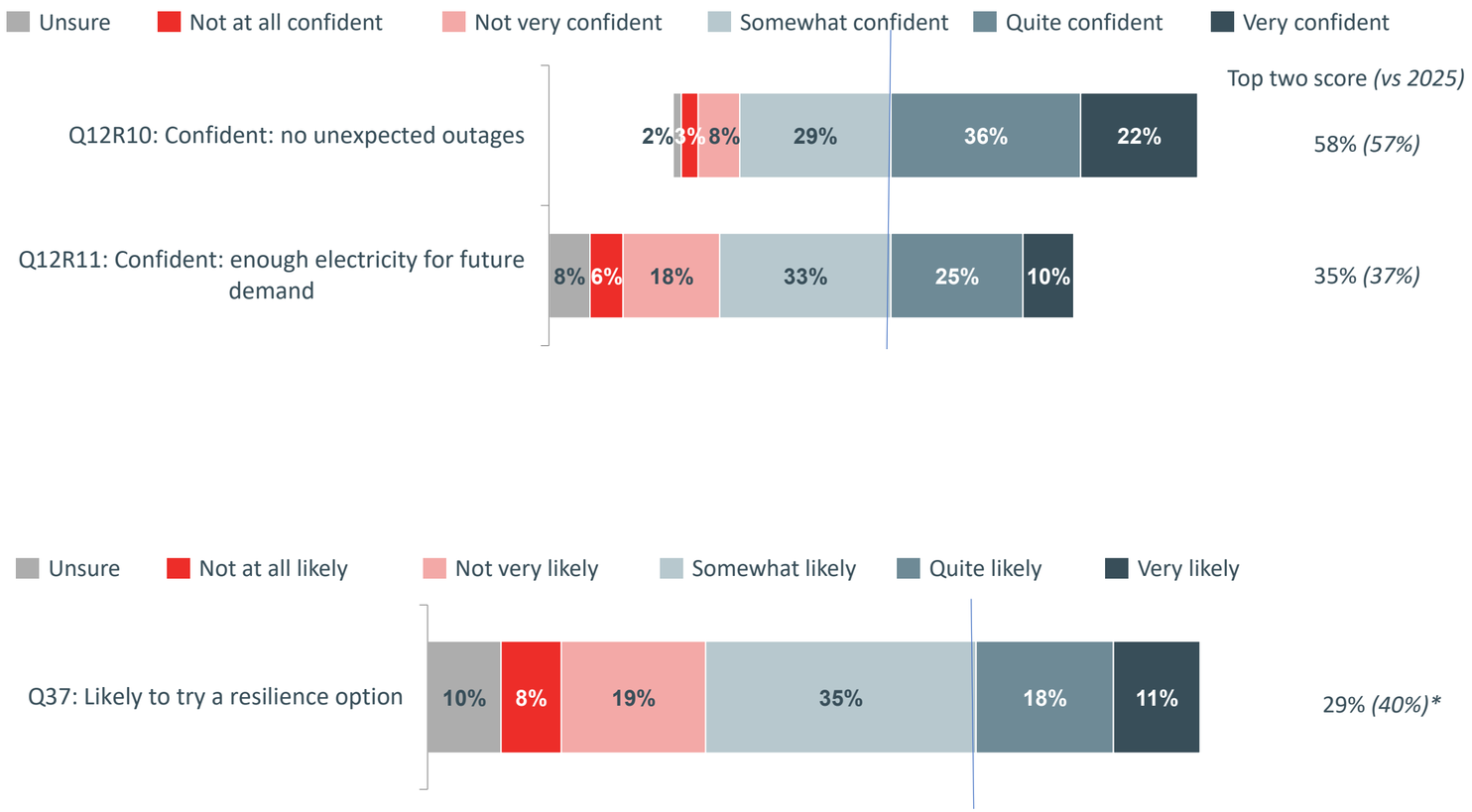
Q12R10: "The supply of power is there when I need it, with no unexpected outages"

Q12R11: "There will be enough electricity to meet New Zealand's future demand"

Q37: "How likely would you be to try one of these options to help reduce the risk of power outages?"

Overall consumer confidence in supply of power when needed is relatively strong with 58% being at least quite confident. However, confidence that there will be enough electricity to meet future demand is lower with only 35% being quite or very confident.

Likelihood to try one of the resilience options presented (i.e. choosing solar, a back-up battery, a smart appliance control, or responding to initiatives to reduce power during peak times) has fallen to 29% (from 40% in 2025).



Base: n=1012 (Wave 2, 2026), residential consumers, weighted. * significantly different

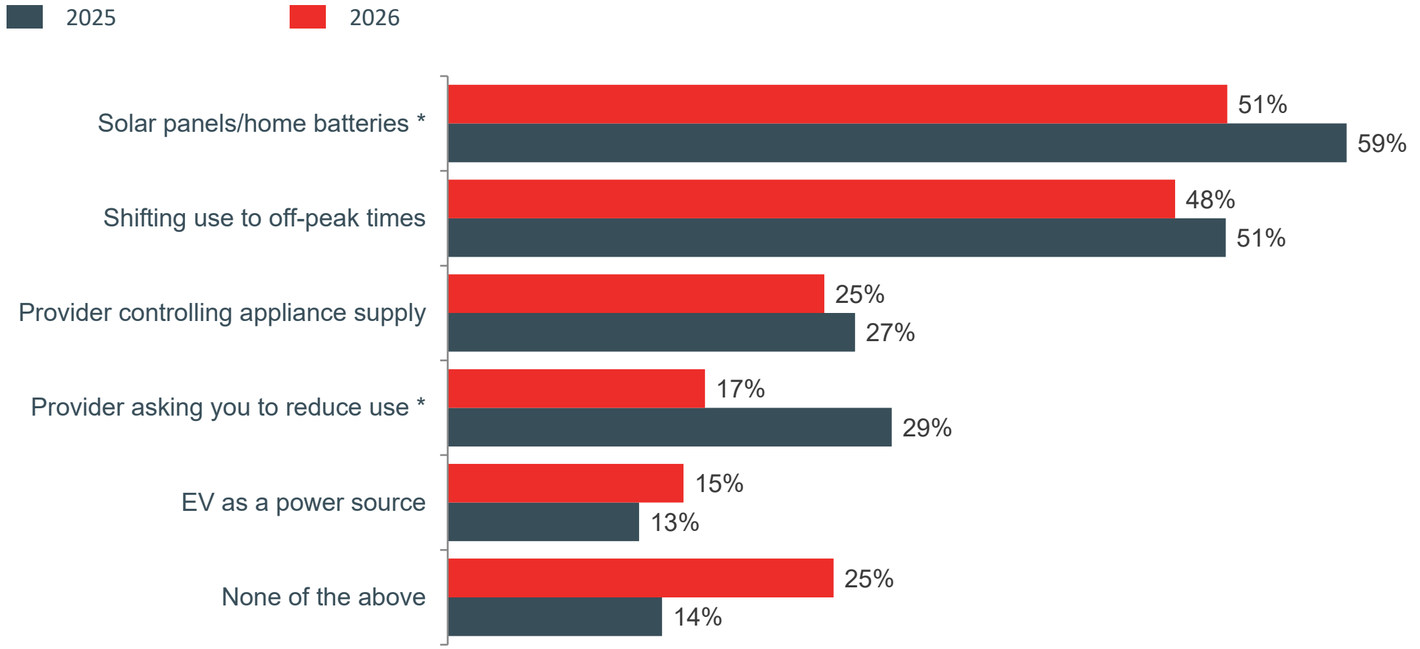
Q36

Awareness of resilience options has also fallen across the board, with 1 in 4 now saying they're not aware.

Q36: "Which of the following options are you aware of that help reduce the risk of supply problems?" (multi-select)

Overall awareness of a prompted set of resilience options that help reduce supply risk fell with the proportions of consumers unaware of any of the listed options rising significantly from 14% to 25%.

Awareness of solar panels / home batteries and provider demand-response as options that help reduce risk of supply problems also both fell significantly.



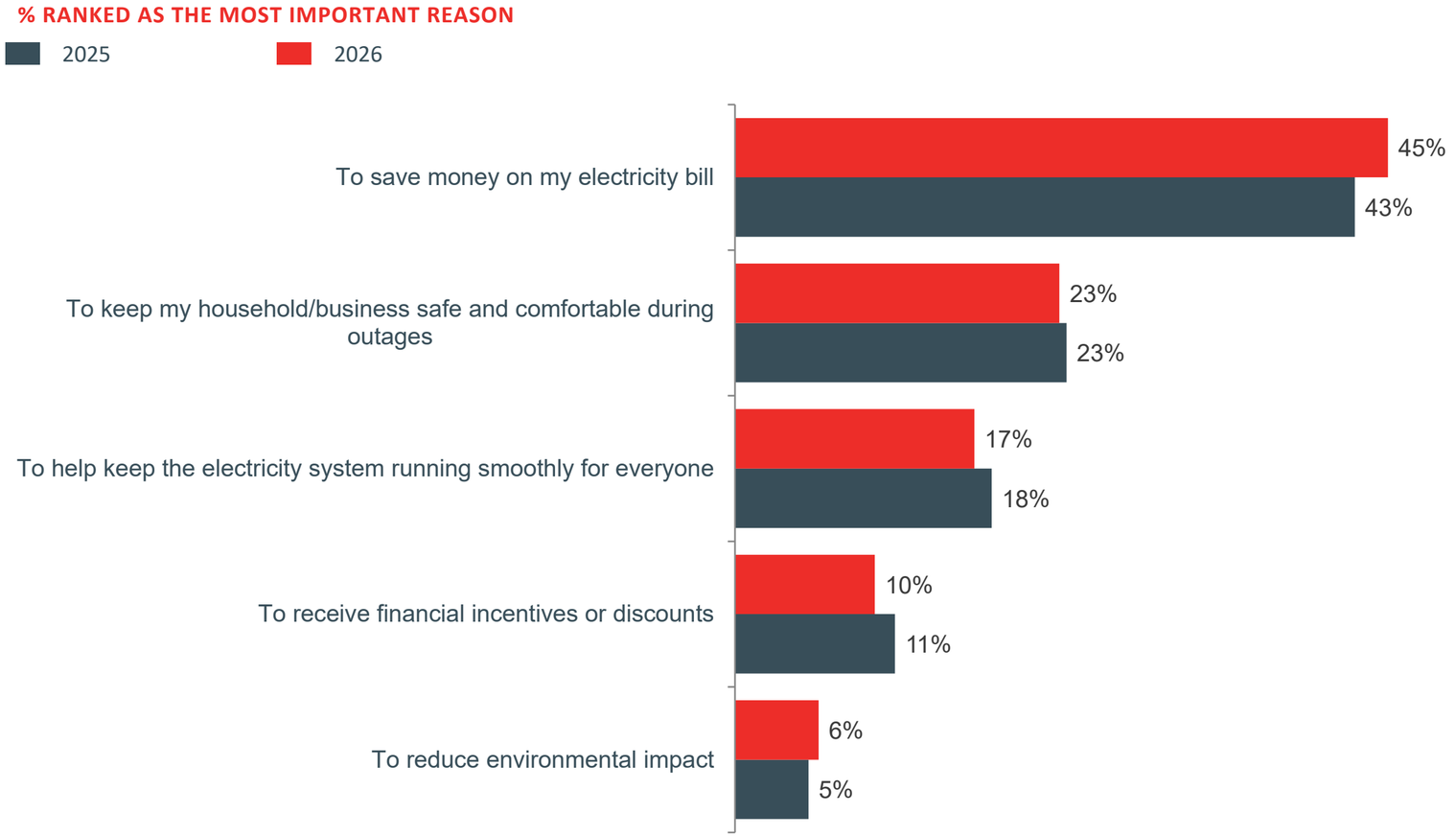
Base: n=1005 (Wave 1, 2025) / n=1012 (Wave 2, 2026), residential consumers, weighted. * significantly different

Q38

Saving money remains the top reason to choose an outage resilience option.

Q38: "Please order the following reasons for why you might be likely to choose an option to reduce the risk of outages, from the most important reason to the least important reason." Shown here as % who ranked most important.

Of those who were at least somewhat likely to try an option to reduce the risk of outages, the most important reason for doing so was to save money at 45%.



Base: all respondents who completed the ranking (Wave 1, 2025 n=693) / (Wave 2, 2026, n=611), unweighted

Differences by demographics, by wave and versus small businesses

DIFFERENCES: DEMOGRAPHIC and LOCATION

Summary

Age, gender and location each shape confidence and behaviour in distinct ways

Each "X% vs Y%" compares that group's top two box score against the rest of the sample (as opposed to the total population average).

AGE

- **18–34 year olds** are more likely to have sought bill support (25% vs 13%) and to have received a back-billed charge (20% vs 6%); they're also more confident support is available (37% vs 22%) and that they know where to get it (33% vs 25%). ***[Q33, NEW4, Q12R3, Q12R4]***
- They're also more confident in future electricity supply (49% vs 31%), more likely to be on a time-of-use plan (30% vs 21%), and slightly less driven by saving money as a switching reason (80% vs 91%) than older consumers. ***[Q12R11, Q18, Q25]***
- **35–64 year olds** are the most likely age group to have switched provider, but report the lowest confidence in affording their bill (25% not confident vs 15% of 65+) and a dip in satisfaction (69% vs 79% elsewhere). ***[Q21, Q32, Q12R2, Q14]***
- **Those 65+** are the least likely to have sought support or been back-billed, but also show the lowest switching intent (12% vs 19%) and weakest response to personalised switching offers (21% vs 34%). They report the highest satisfaction (82%), closest usage monitoring (60% vs 47%), and strongest understanding of how their bill is calculated (55%). ***[Q33, NEW4, Q23, Q24, Q14, Q31, Q12R8]***

RURAL vs URBAN

- **Rural consumers** report lower confidence in reliable supply (35% vs 63% elsewhere), the largest demographic difference in this report. ***[Q12R10]***
- They are also the most likely to have never switched provider (47% vs 33%), least likely to believe it's worth shopping around (37% vs 52%), least likely to agree companies compete for their benefit (28% vs 44%), and less likely to bundle any additional service, especially internet (10% vs 27%). ***[Q21, Q30R2, Q30R4, Q16]***
- **Large-city consumers** are more likely to bundle gas (20% vs 10%) and internet (29% vs 20%), show higher agreement that companies compete for consumer benefit (47% vs 37%), and are more confident in future electricity supply (39% vs 31%). ***[Q16, Q30R4, Q12R11]***

GENDER

- **Women** are more likely to find their bill unaffordable (26% vs 15%) and less confident they'll be able to pay it in six months; they are also less confident in reliable supply (53% vs 64%) and more likely to have never switched provider (39% vs 31%). ***[Q32, Q12R2, Q12R10, Q21]***
- **Men** are more confident identifying appliances that use the most power (57% vs 44%), understanding their bill (53% vs 42%), and knowing how to reduce costs (48% vs 39%). They are also more aware of UDL (29% vs 20%) and of solar/battery and demand-response options (56%/20% vs 46%/14%). ***[Q12R7, Q12R8, Q12R9, NEW3, Q36]***
- Among those who have switched, saving money is a bigger stated driver for men (55%) than women (36%); men are also somewhat more likely to believe it's easy to shop around (54% vs 45%). ***[Q22, Q30R2]***

REGION

- **Northland / Bay of Plenty / Gisborne / Hawke's Bay** shows more complaints (13% vs 6%) and lower switching intent (10% vs 18%). ***[NEW2, Q23]***
- **Canterbury and Auckland** sit at opposite ends on usage monitoring with Canterbury residents monitoring most closely (62% vs 48% elsewhere), and Auckland residents monitoring least closely (45%). ***[Q31]***
- **Wellington** shows notably higher time-of-use plan uptake (33% vs 22%). ***[Q18]***

Base: n=1012 (Wave 2, 2026), residential consumers, weighted. differences are statistically significant (p<.05) unless noted as small-sample.

DIFFERENCES: WAVE 1 vs WAVE 2

2025 → 2026

10 Key measures showed a statistically significant decline since 2025.

Q#	Measure	2025	2026	Change in percentage points
Affordability & Protection				
Q32	The power bill being not very or not at all affordable *(positive change indicates less affordability)*	16%	21%	+5
Q33R1	Ever sought support with power bill	20%	16%	-4
Switching & Competition				
Q30R3	Agreement that companies are innovating	58%	51%	-7
Q30R4	Agreement that companies compete for my benefit	50%	42%	-8
Q23	Likelihood to switch, next 12 months	21%	17%	-4
Q24	Likelihood to switch, with personalised info	37%	31%	-6
Efficiency & Engagement				
Q31	Monitor power use very/quite closely	57%	50%	-7
Q12R7	Confident I know which appliances use the most power	55%	50%	-5
Security & Reliability				
Q37	Likely to try a resilience option	40%	29%	-11
Q36R6	Aware of none of the above resilience options *(positive change indicates less overall awareness)*	14%	25%	+11

Base: n=1005 (Wave 1, 2025) / n=1012 (Wave 2, 2026), residential consumers, weighted. All movements shown are statistically significant (p<.05).

Res vs Bus

Compared with small businesses, residential consumers are less aware of supply resilience options and less engaged with comparison services.

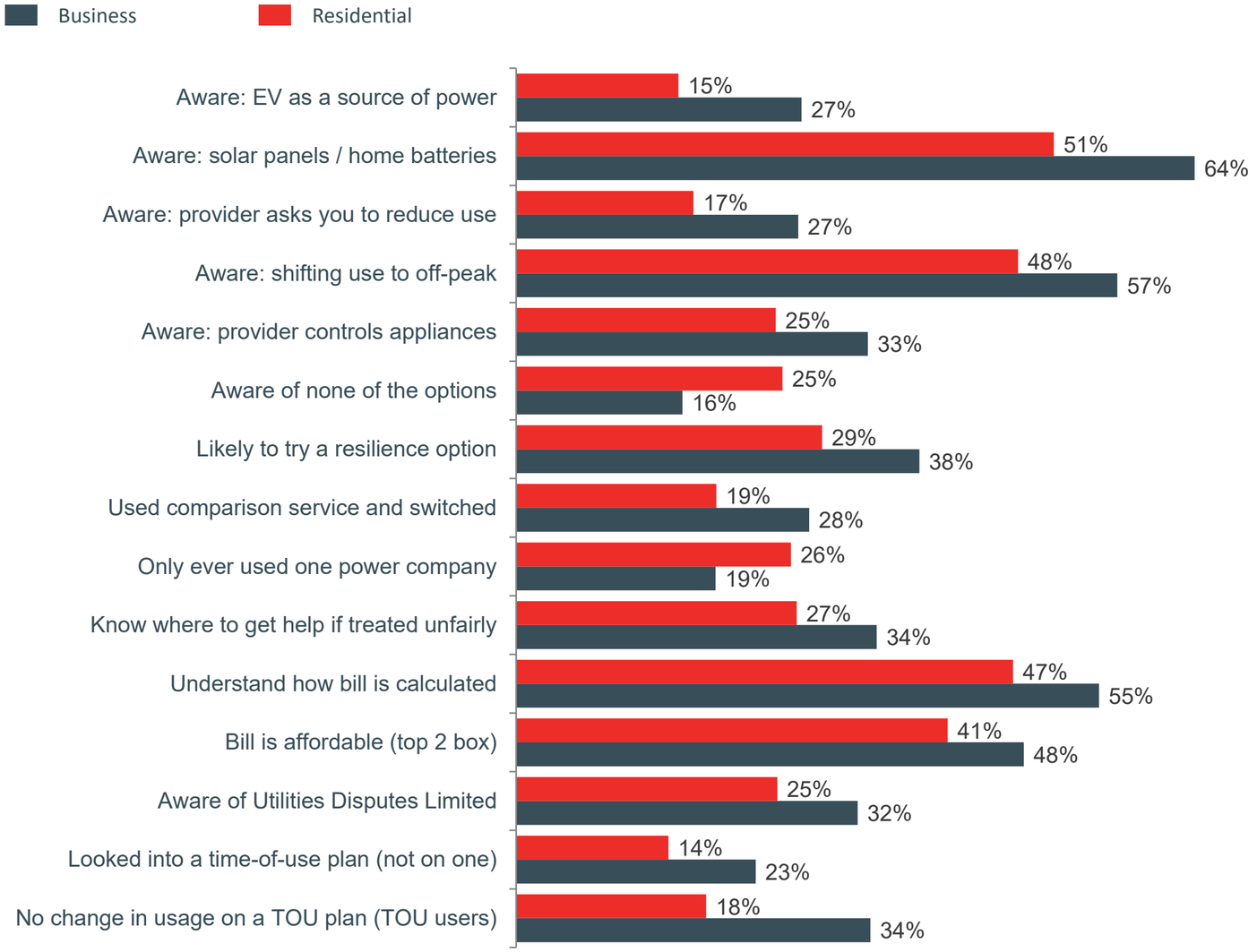
Where residential and business consumers differ

A separate report has been prepared for Small Business consumers.

Of the measures asked the same way in both surveys, the clearest difference is supply resilience. Residential consumers are less aware of every option tested (for example solar panels or home batteries, 51% vs 64% of businesses) and less likely to say they would try one (29% vs 38%).

Residential consumers are also less likely to have used a comparison service and switched (19% vs 28%) or to have looked into a time-of-use plan (14% vs 23%), and are somewhat less confident they know where to get help (27% vs 34%), understand their bill (47% vs 55%) and find it affordable (41% vs 48%).

Satisfaction, confidence in reliability and future supply, likelihood to switch and usage monitoring do not differ significantly.



Base: Wave 2 (2026): residential n=1,012, business n=517 (small businesses, 0–19 employees); weighted. Only differences significant at p<.05 are shown (two-proportion test, effective n). TOU = time-of-use; TOU-user base: residential n=237, business n=143.

Appendix

Q50

Cost dominates open comments, along with calls for regulation and reinvestment.

Q50: "Is there anything else you'd like to share about your experience as an electricity consumer?"

Roughly 1 in 6 respondents left a substantive comment with price and cost-of-living pressure dominating, followed by calls for proactive reform or infrastructure change. Further down there is some criticism of company profits and the fairness of the wider system.

ON PRICE

"I believe the main issue is the regular price increases. I think companies have to do more to keep increases to a minimum or reduce power costs. The profits by power companies is huge."

ON THE WIDER SYSTEM

"We have so much renewable energy yet power companies continue to increase prices to the consumer. Not fair."



Base: all Wave 2 (2026) respondents who left a comment (n=187). Verbatims could match more than one theme.

Profile

The Wave 2 sample reflects the bill-paying cohort across age, gender, region, ethnicity and urban/rural, and closely matches the Wave 1 profile.

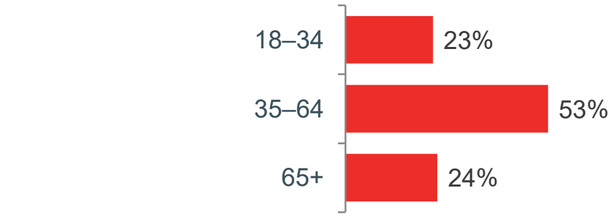
Who we surveyed

1,012 household bill payers and decision makers took part in Wave 2 (1,005 in Wave 1). Results are weighted to the profile of the bill-paying cohort on age, gender, region, ethnicity and urban/rural, so the weighted profile closely matches Wave 1.

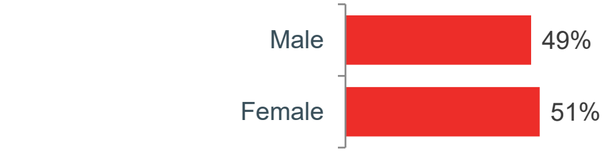
Just over half are aged 35–64 years (53%), with 23% aged 18–34 years and 24% aged 65+. The sample is evenly split by gender (51% female). Around two-thirds live in a city (51% large city, 15% small city), 16% in a rural area, and 33% in Auckland.

Characteristics that are not weighting targets are broadly stable: 60% own their home and 37% rent, and 27% of households include children under 14 and 28% include adults over 65.

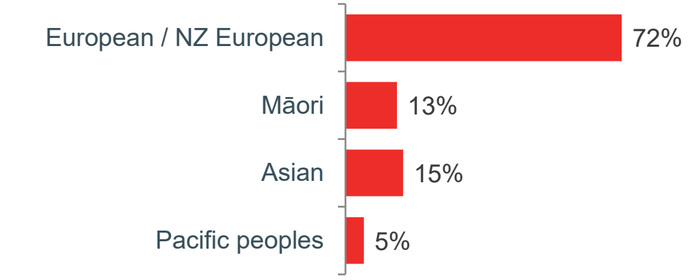
Age



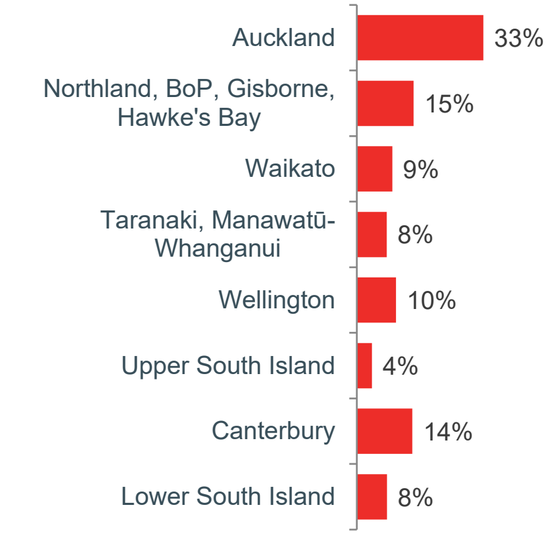
Gender



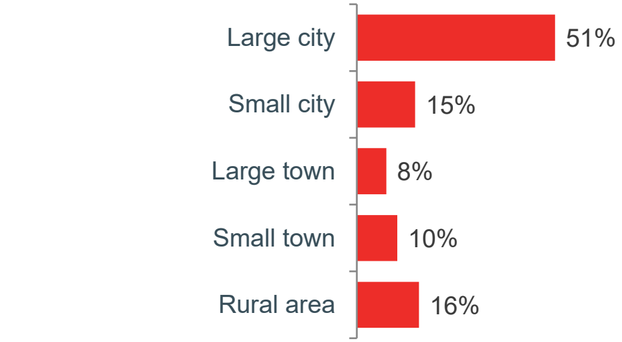
Ethnicity (multi-select)



Region



Urban / rural



Base: Wave 2 (2026) n=1,012 residential consumers; weighted. Ethnicity is multi-select (totals more than 100%). Gender: another gender / prefer not to say (<1%) not shown. Large city = 100,000+, small city = 30,000–99,999, large town = 10,000–29,999, small town = 1,000–9,999.

How the questionnaire changed between 2025 and 2026

- New questions added in 2026 (no 2025 baseline): NEW1 (reason for changing/not changing usage behaviour after a TOU plan, open text), NEW2/2.1/2.2 (complaints and where consumers would seek help), NEW3 (awareness of Utilities Disputes Limited), and NEW4/4.1 (back-billing incidence and disclosure quality).
- Questions dropped in 2026: Q34 (overall reliability of local supply) and Q35 (biggest risk to reliability).
- Response scale changed: Q5 (gender) gained a 'Prefer not to say' option in 2026 (2025 offered only Male/Female/Another gender). Q44 (household income) gained a new $150,000–$200,000 band and raised the open-ended top band from 'More than $150,000' to 'More than $200,000'.
- New answer options added: Q22 (switch reasons) gained 'I moved house'; Q22, Q25 and Q26 each gained an 'Other (please specify)' option; Q33 (support channels) split 'Electricity broker or switching service' into three separate options: 'Electricity broker', 'a comparison service' and 'a switching service'.
- Definitions tightened in Q40 (household composition): 'working from home most days' became 'three or more days a week', and 'a person relying on electricity for medical or health reasons' became a formal 'medically dependent consumer' definition.
- Minor: the Q13 power-company drop-down list removed Frank Energy and Hunet Energy in 2026 (provider exits/consolidation).

Significance testing methodology

- Tested using two-proportion z-test, two-tailed, comparing the weighted percentage on a given metric between Wave 1 and Wave 2.
- Threshold: a result is flagged 'significant' only where $p<0.05$ (95% confidence).
- All figures are reported at the total residential population level.
- Demographic and location testing: for every metric, each subgroup of age (18–34/35–64/65+), gender (male/female), region (8 groups) and urban/rural (5 groups) was compared against the rest of the Wave 2 (2026) sample using the same two-proportion z-test at $p<0.05$, restricted to comparisons where both the subgroup and the rest of the sample had at least 30 unweighted respondents.