# EECA Consumer Energy Monitor

## Q2 FY25

March 2025

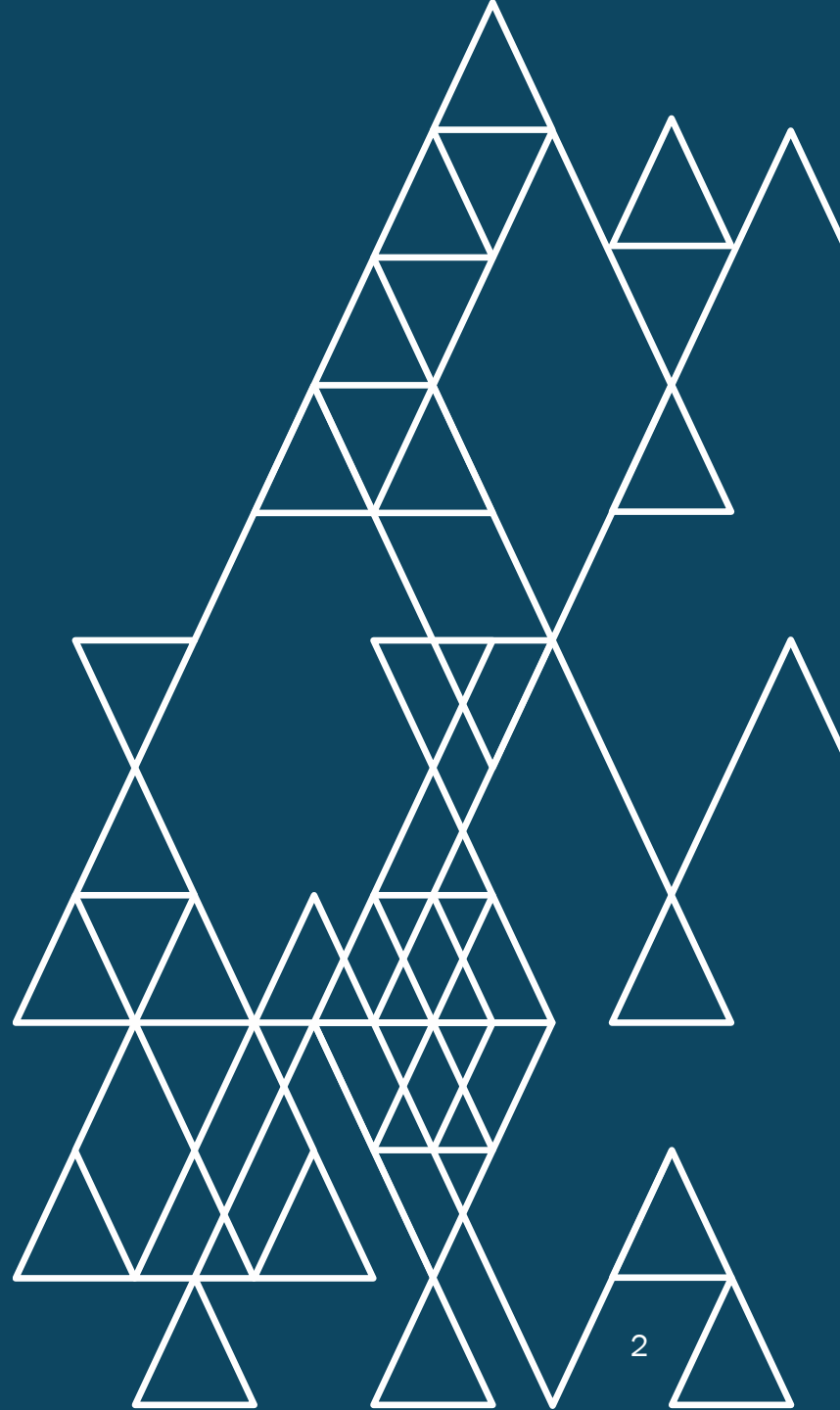
EECA
TE TARI TIAKI PŪNGAO
ENERGY EFFICIENCY & CONSERVATION AUTHORITY

# Background

## This study is designed to understand New Zealanders' relationship with energy:

The monitor captures data on how New Zealanders are interacting with energy in their home, both as a snapshot and how this develops over time. Alongside broader behavioural and attitudinal trends, this study allows EECA to evidence impact of its programmes and intervention.

This report includes results from both the first and second quarter of a new tracking study of New Zealanders. While the first quarter's deep dive primarily looked at results at a total population level, this second deep dive looks to understand important dimensions on which segments of the population differ in their energy attitudes and behaviours. The report does not seek to size or demographically profile these audiences.



# Methodology

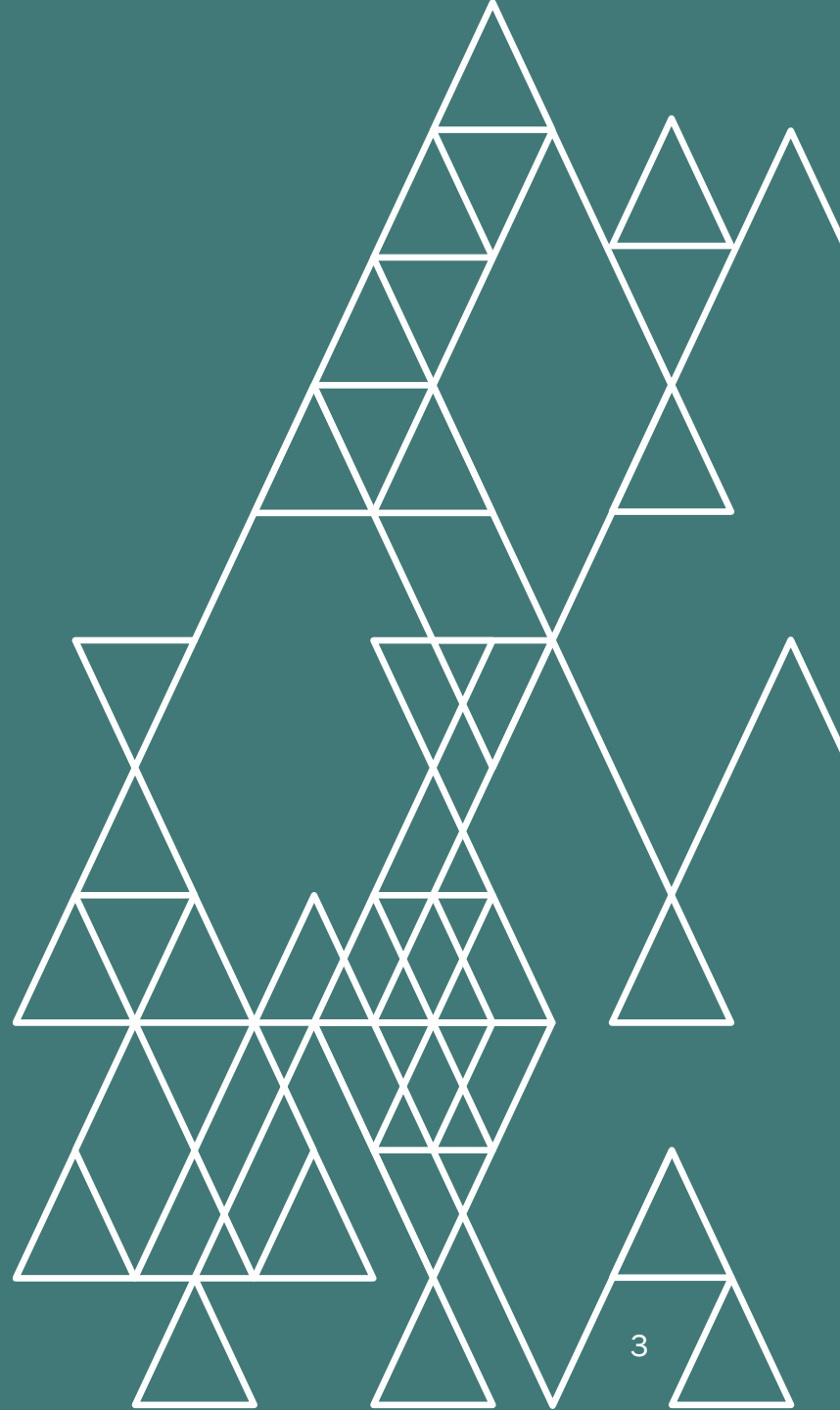
**Each quarter, approximately 750 New Zealanders take part in an online survey designed to capture insight in the following areas:**

- Context of energy use (house age, energy supply, household structure etc.)
- Approach to energy consumption (how aware they are of their energy costs, their sentiment towards this, what actions – if any – they are aware they could take to reduce energy use, and what they actually do)
- Broader attitudes towards energy, knowledge of renewables and appetite to find out more
- Awareness and engagement with EECA and related brands.

The sample is nationally representative based on age, gender and region.

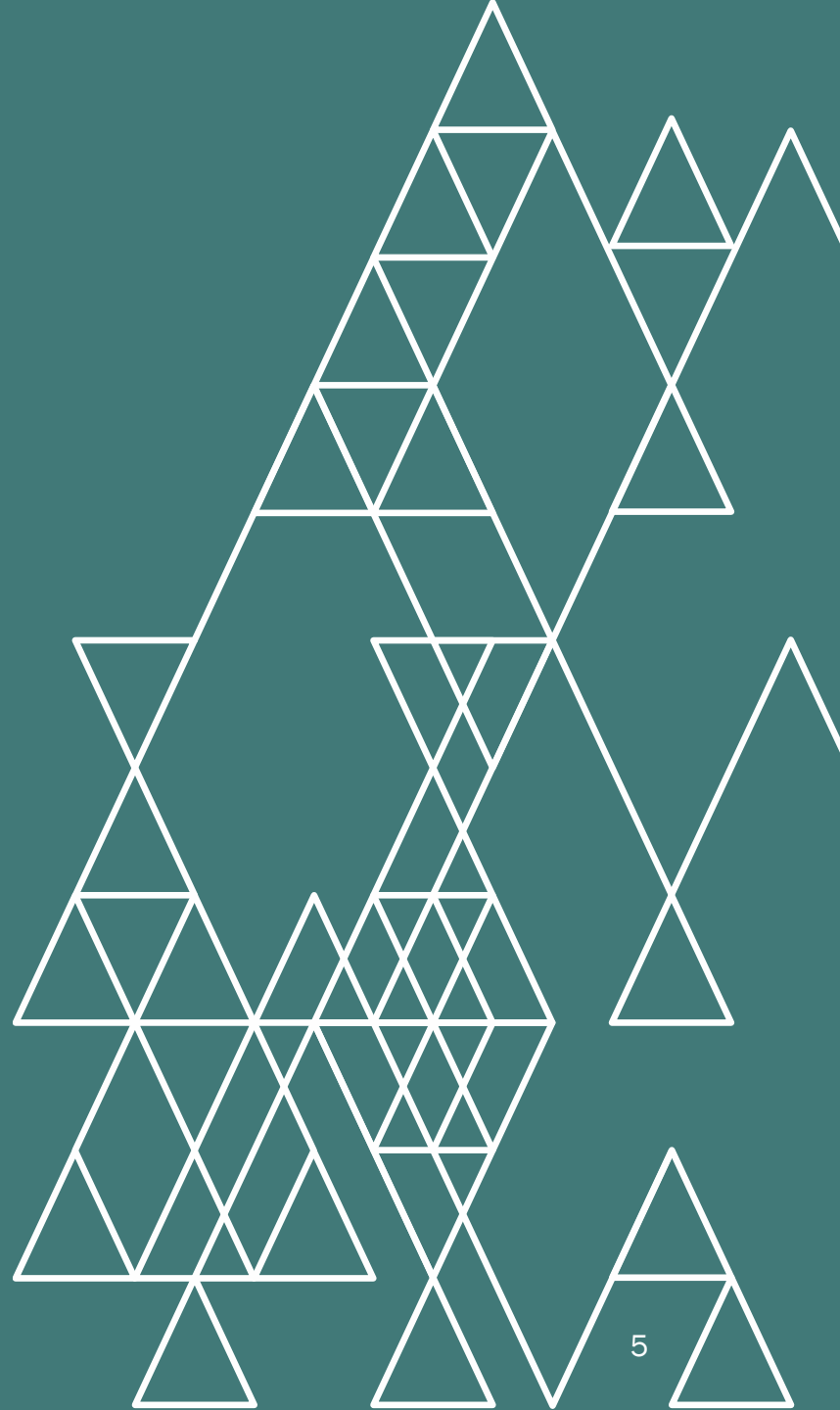
This quarter n=790 took part in the study, giving a margin of error of +/- 3.6% at a 95% confidence interval. Fieldwork took place from 24/10/24 – 15/12/24.

In total, a sample of 1,550 survey responses were analysed, including those from the previous quarter (n=760).



# Contents

# Section 1:
# Drivers of attitudes and behaviour



# In Q3 of 2024, data showed...

That many New Zealanders feel under pressure around their energy use, with 8 in 10 worrying about increasing household energy prices

And nearly half wouldn’t describe themselves as confident (45%) in managing their energy use

Homeownership and financial position emerged as key dimensions in determining confidence and likelihood to take important actions

# As we look to empower energy users in efficient energy use, what more can we understand about how each dimension drives attitudes and behaviour?

- In what ways do each of **home ownership** and **financial position** influence New Zealanders' energy use?
- What does this imply for how we define meaningfully unique segments of the population?

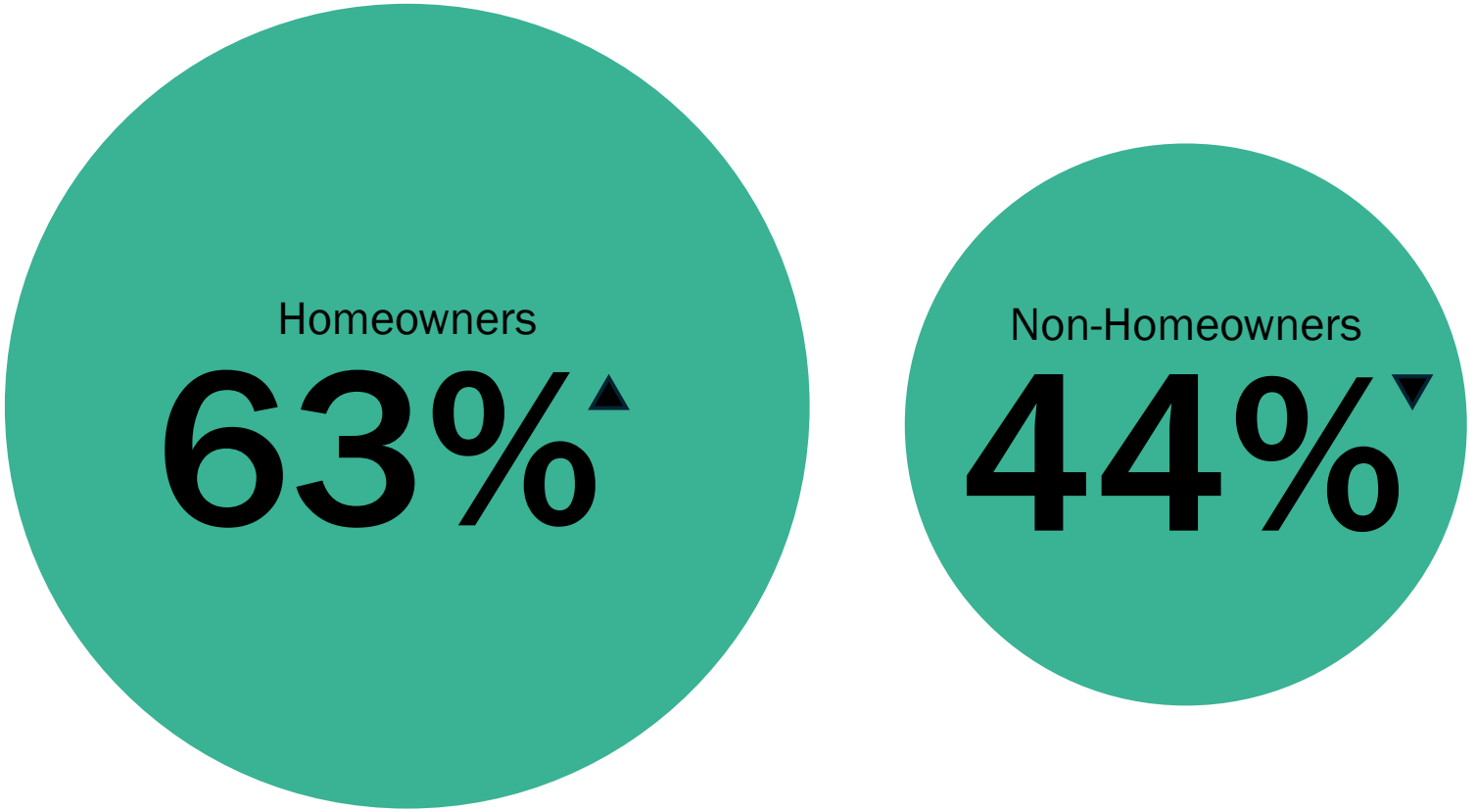
| | | | |
|---|---|---|---|
| **1.** | **Home ownership** | Non-homeowners ⟷ | Homeowners |
| **2.** | **Financial position** | Financially challenged<br>- <$100k HH income<br>- OR financially uncomfortable ⟷ | Financially stable<br>- $100k+ HH income<br>- AND financially comfortable |

Q. Do you own the property you live in?
Q. Which of the following best describes your total household income before tax?
Q. How would you describe your financial position? (Very comfortable / Comfortable or Uncomfortable / Very uncomfortable)

# Homeowners generally feel the most empowered around energy

Home ownership

Confidence in understanding and manage energy (4 or 5 out of 5)



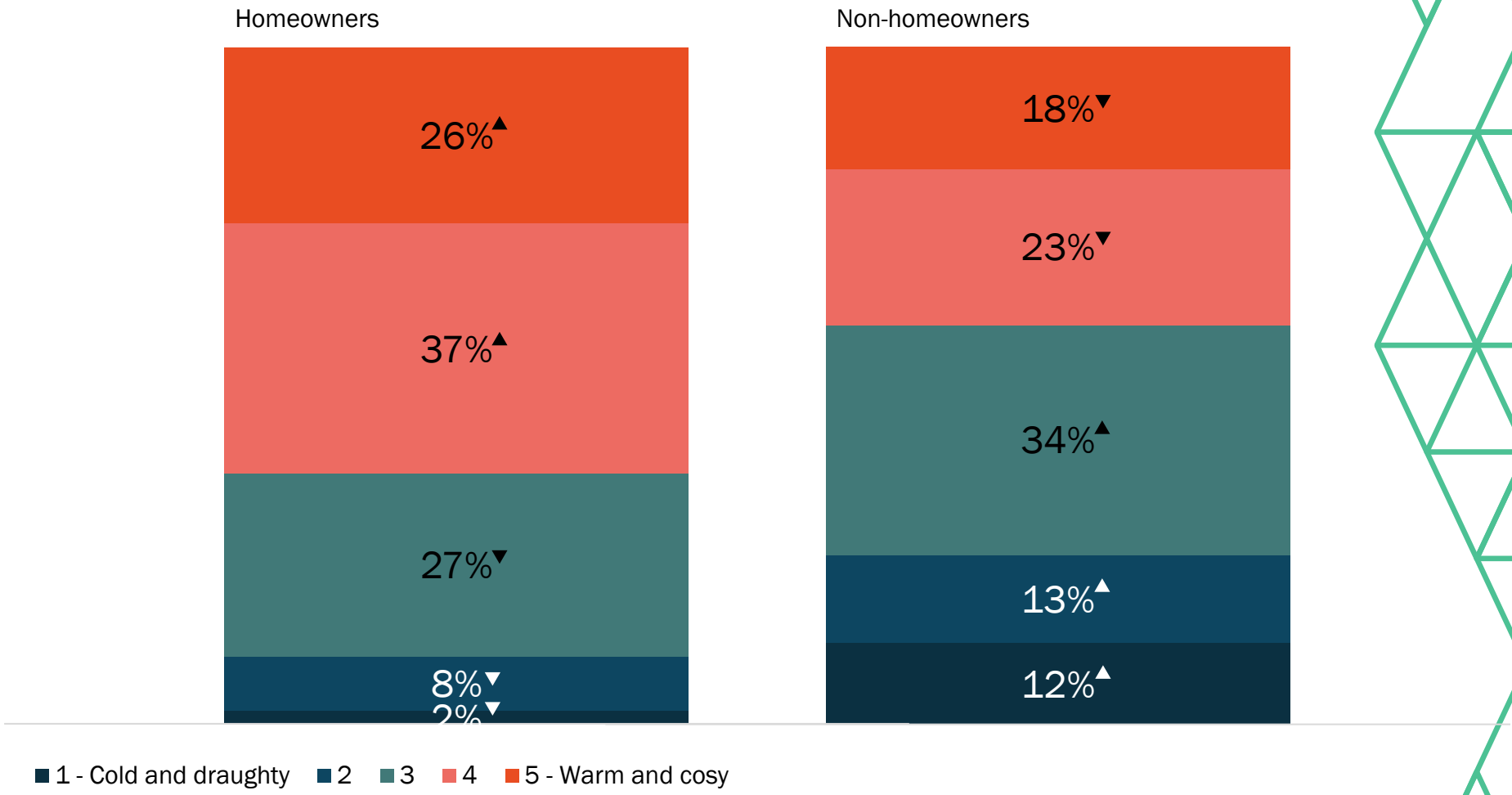

Q. How confident are you in your ability to understand and manage your energy use? By manage we mean take steps to optimise, control or reduce your energy use. This includes energy use in your home such as electricity, gas, wood or coal. (5-point scale; 1 = Not at all confident; 5 = Very confident)
Base: Homeowners n=984, Non-Homeowners n-553

▲▼ Significantly higher/lower than others

# Homeowners tend to view their homes as being warmer



Warmth of Home

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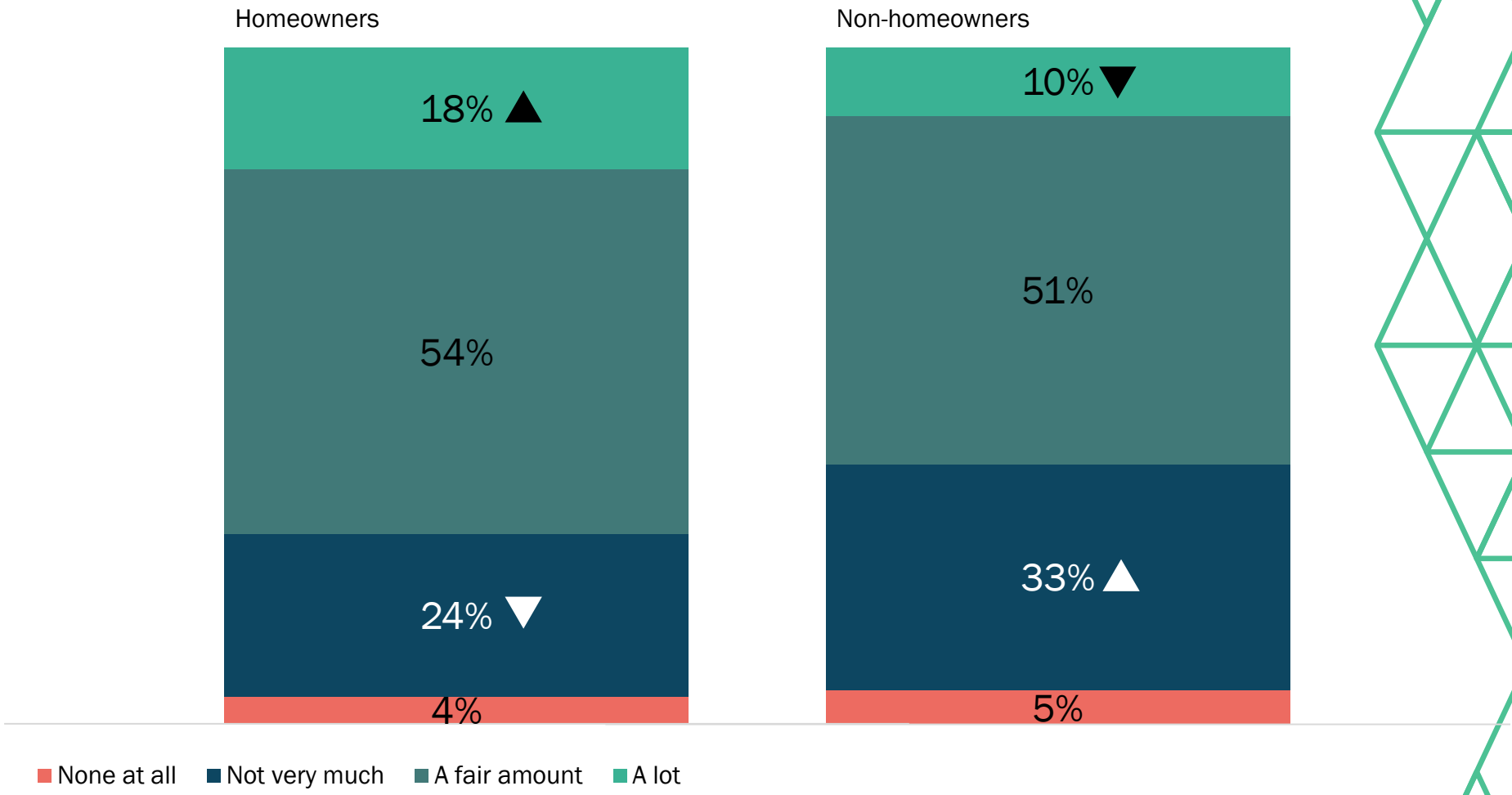
Q. Thinking about your home (rather than how much you heat it), would you say that your house is cold and draughty or warm and cosy?
Base: Homeowners n=984, Non-Homeowners n-553

# Homeowners are more likely to give their home energy use greater thought



Amount of thought given to energy usage

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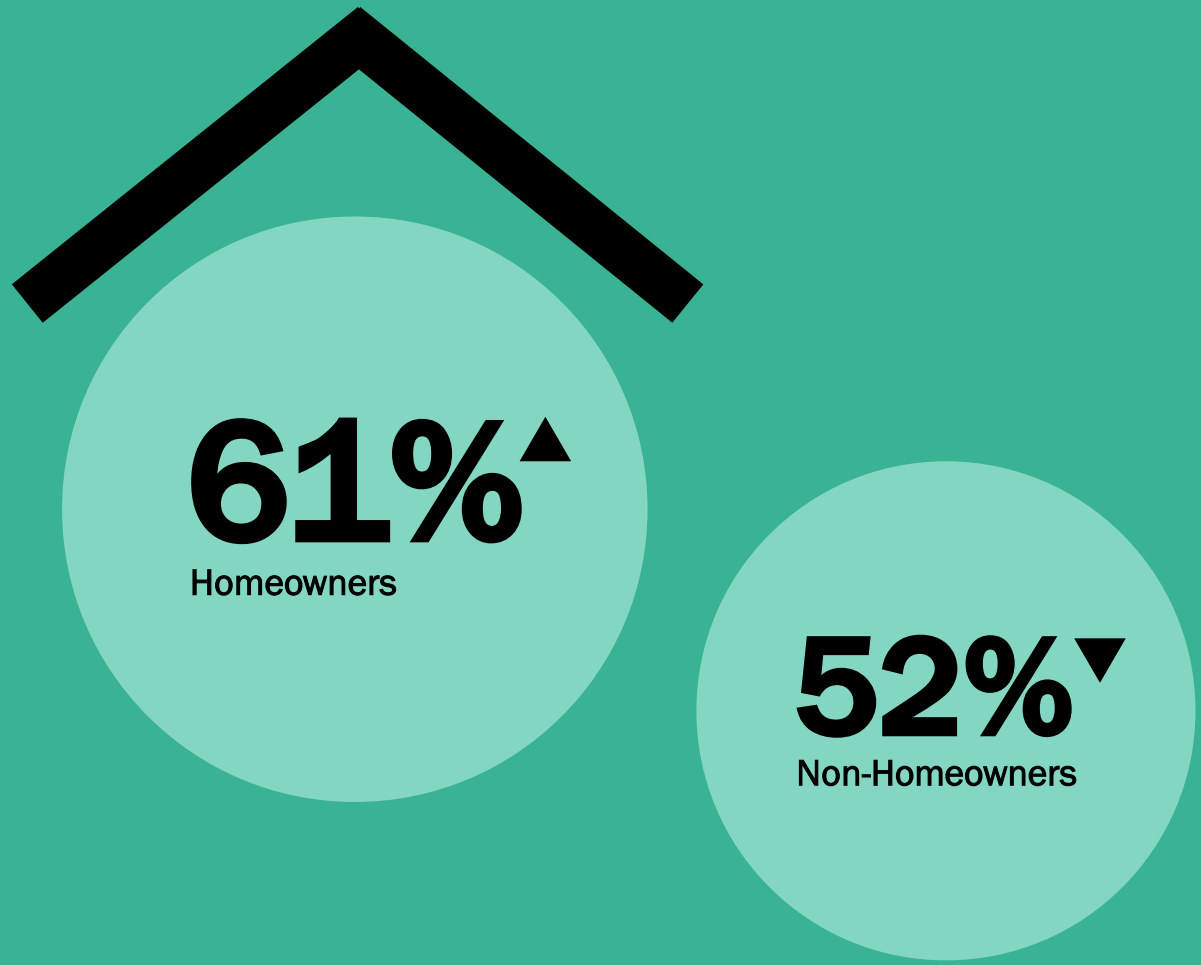
Q. How much thought, if any, would you say you give to the amount of electricity / gas you use in your home?
Base: Homeowners n=984, Non-Homeowners n-553

# And homeowners have a greater desire for more information around energy efficiency

% that want to know more about how to use energy efficiently

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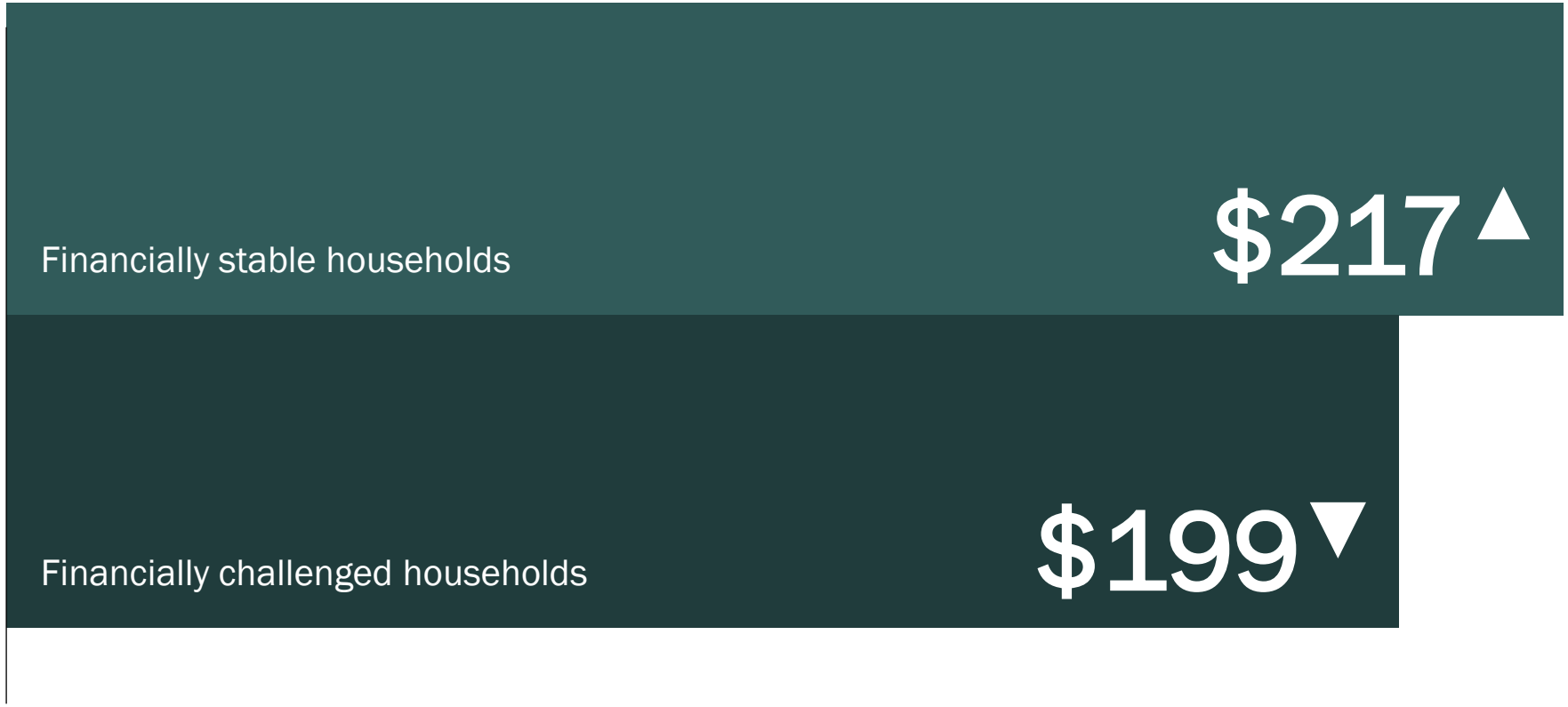
Q. Would you like to know more about the most effective ways to use energy more efficiently in your home?
Base: Homeowners n=984, Non-Homeowners n-553

# Financially stable households tend to spend more on electricity



**Monthly electricity bill** - Approximate average spend




Q. How much is your household's monthly electricity bill?
Base those who use electricity: Financially challenged households n=919, Financially stable households n=369

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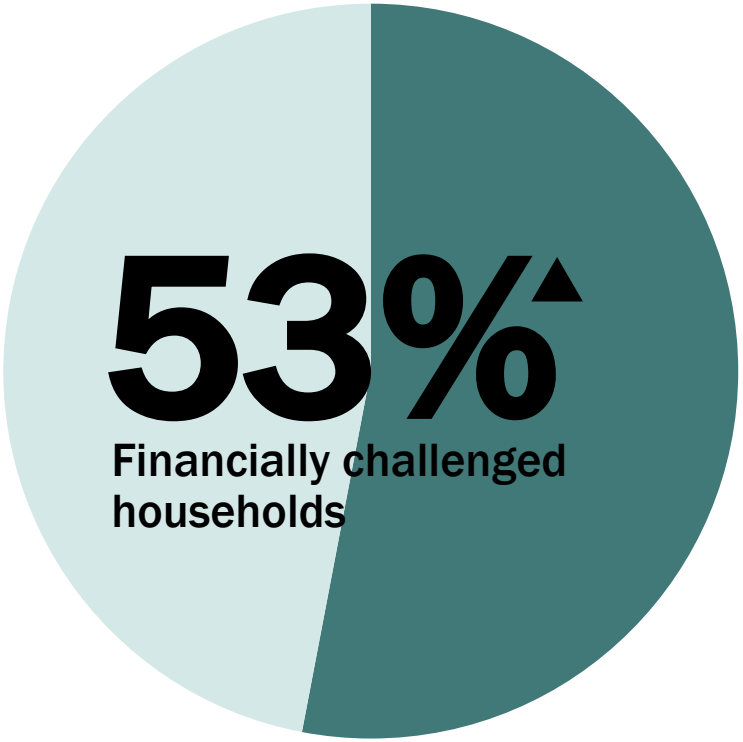
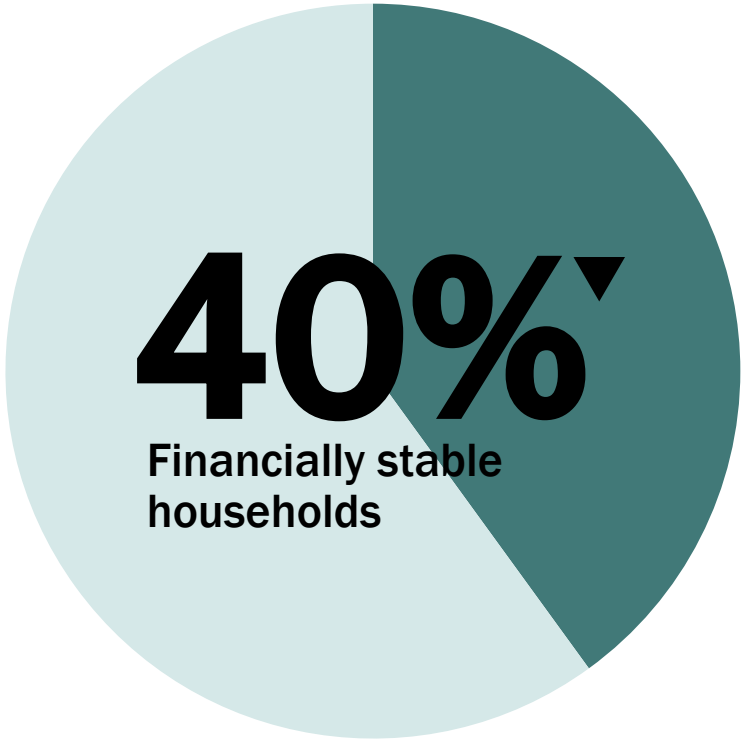
# Financially challenged households are more likely to feel a lack of control over energy bills



% that worry about lack of control over energy bills




Q. To what extent do you agree or disagree with the following in relation to your gas/electricity bills? I worry about my lack of control over energy bills (NETT Agree + Strongly Agree)
Base: Financially challenged households n=988, Financially stable households n=389

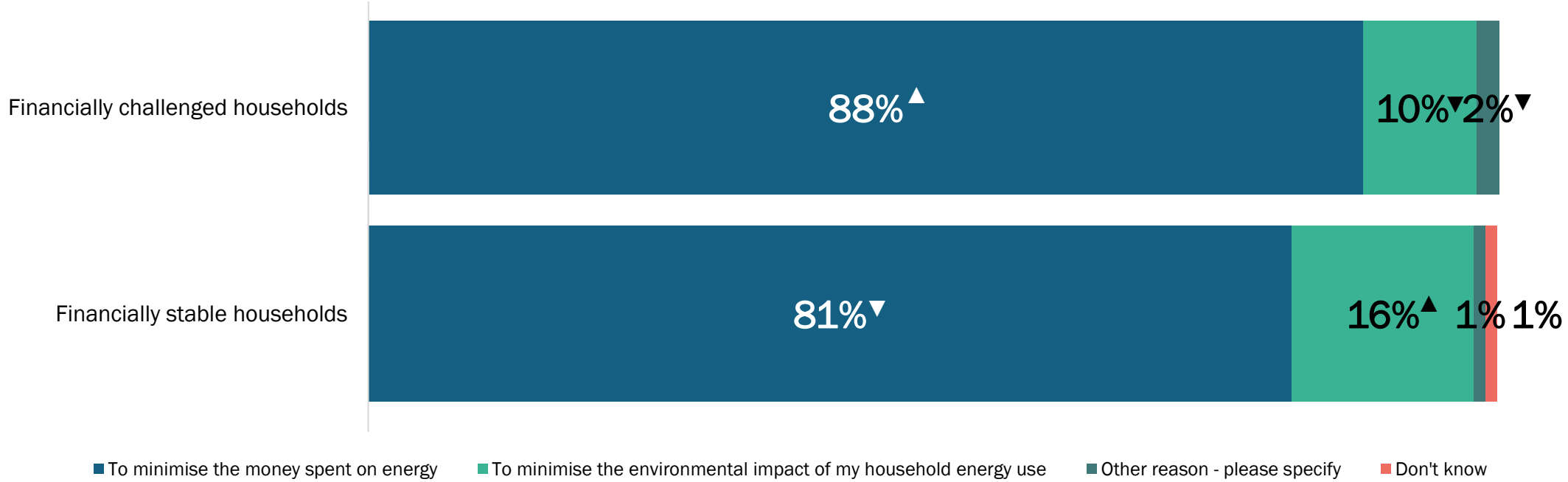
▲▼ Significantly higher/lower than others

# And thinking around energy use is largely driven by reducing money spent on energy



This is true across households, though environmental considerations are more likely to be a reason for financially stable households to give attention to their energy use.

**Reason for thinking about energy usage a fair amount / a lot**




Q. You said that you [pay a lot of / pay a fair amount of] attention to the amount of energy you use in your home. What is the main reason for this?
Base: Financially challenged households n=739, Financially stable households n=263

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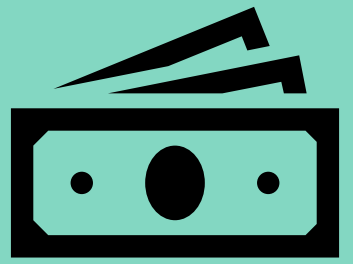
IMPLICATION

# These two dimensions help to differentiate empowerment, and the impetus to act

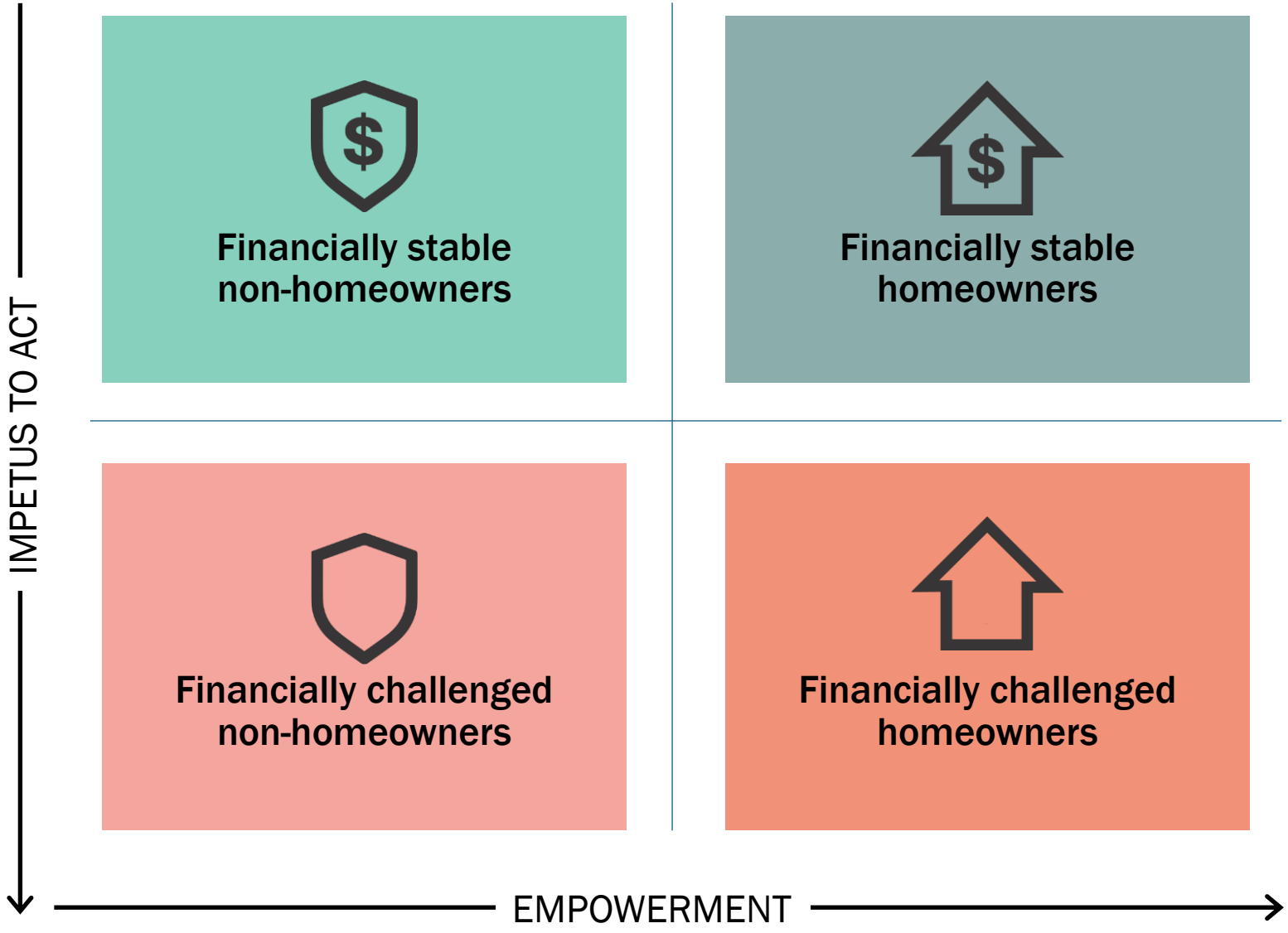
**Homeowners** have the power (and confidence) to make meaningful changes in their energy use.



**Financially challenged households** have a stronger need to be more efficient, which is all around saving costs.

# This creates the basis for understanding different segments of the population

- **Homeowners** have the power (and confidence) to make meaningful changes in their energy use.
- **Financially challenged households** have a stronger need to be more efficient, which is all around saving costs.



# Defining the segments

**Financially stable non-homeowners**

- Non-homeowner
- $100k+ HH income
- AND financially comfortable

**Financially stable homeowners**

- Homeowner
- $100k+ HH income
- AND financially comfortable

**Financially challenged non-homeowners**

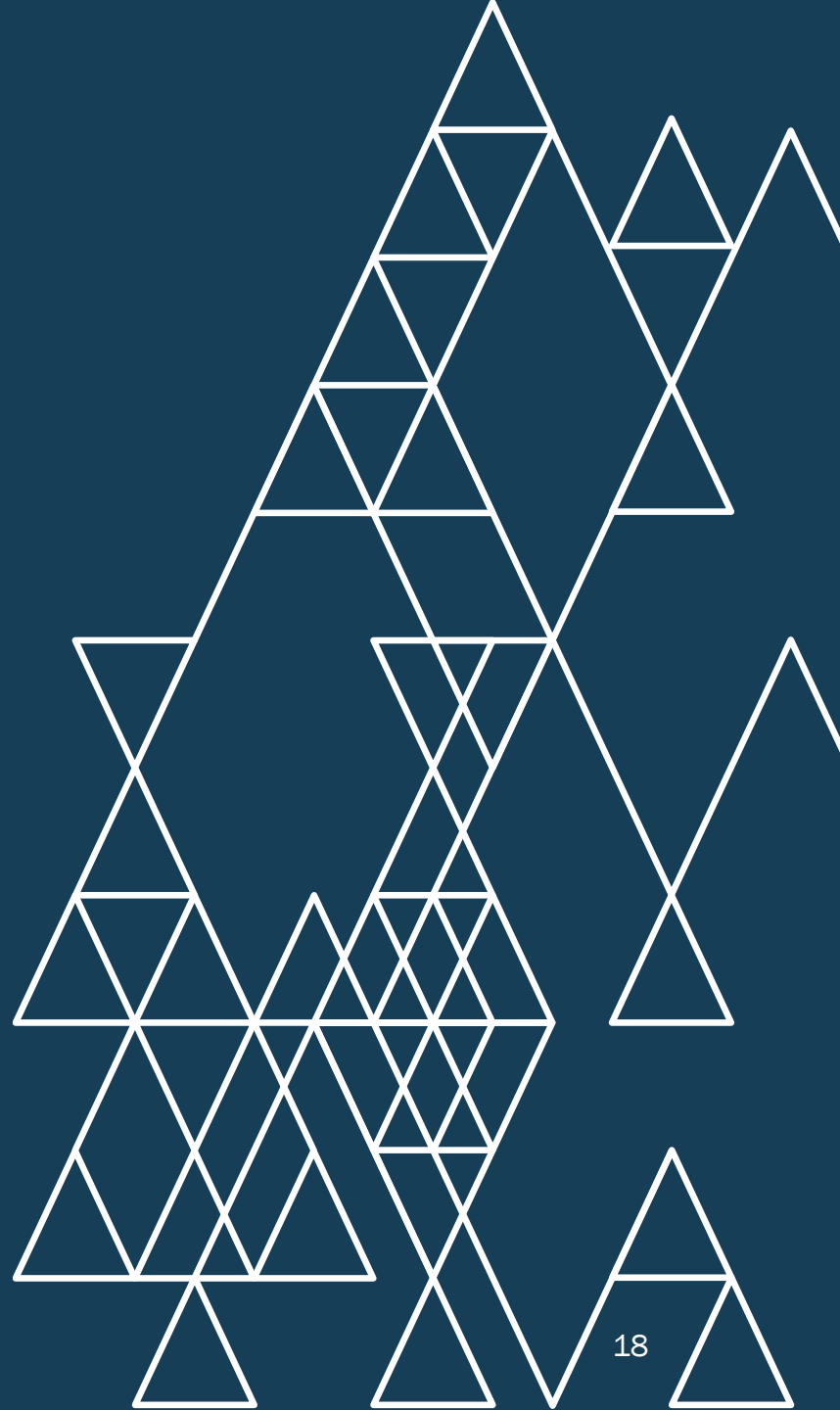
- Non-homeowner
- <$100k HH income
- OR financially uncomfortable

**Financially challenged homeowners**

- Homeowner
- <$100k HH income
- OR financially uncomfortable

Q. Which of the following best describes your total household income before tax?
Q. How would you describe your financial position? (Very comfortable / Comfortable or Uncomfortable / Very uncomfortable)
Q. Do you own the property you live in?
Base: Financially stable homeowners n=328, Lower income homeowners n=601, Financially stable non-homeowners n=78, Financially challenged non-homeowners n=446

# Section 2: Understanding where segments are on their journey

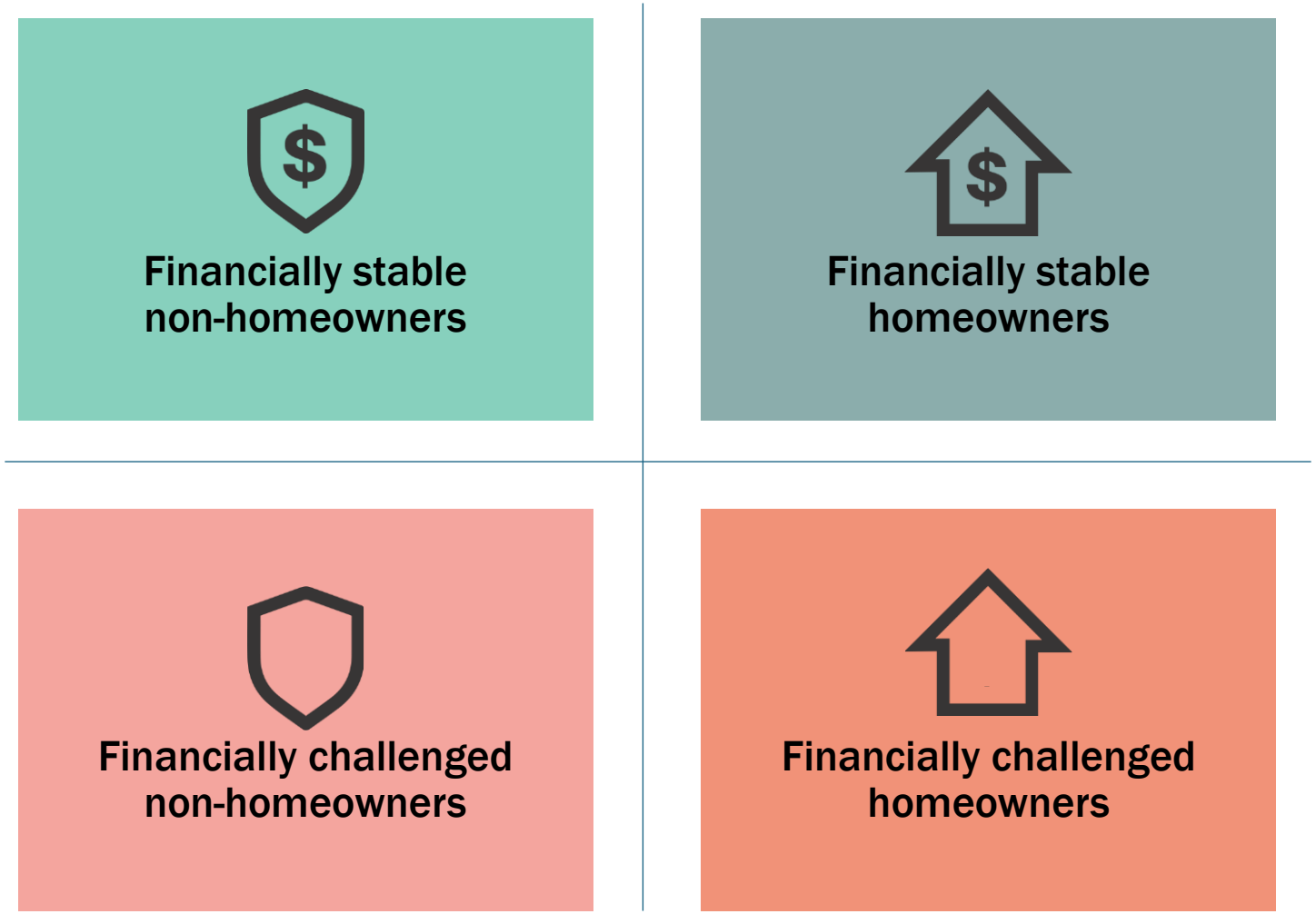


# As we look to empower energy users around efficiency, what can we understand about these key audiences?

What are their needs?

Where are they on their energy journeys?

What role can EECA play?



# The segment picture – Relationship with energy

Homeowner segments feel more confident in understanding and managing their energy use.

| | Financially challenged homeowners | Financially stable homeowners | Financially challenged non-homeowners | Financially stable non-homeowners |
|---|---|---|---|---|
| Confidence in understanding & managing energy use (4 / 5 out of 5) | ▲62% | ▲66% | ▼44% | 49% |
| Warmth of home (4 / 5 out of 5) | 58% | ▲71% | ▼38% | 56% |
| Think about energy 'a lot' | ▲19% | 16% | ▼11% | ▼7% |
| Desire information around energy efficiency | 59% | ▲66% | ▼53% | 55% |

Q. How confident are you in your ability to understand and manage your energy use? (5-point scale; 1 = Not at all confident; 5 = Very confident)
Q. Thinking about your home (rather than how much you heat it), would you say that your house is cold and draughty or warm and cosy? (5-point scale; 1 = Cold and draughty ; 5 = Warm and cosy)
Q. How much thought, if any, would you say you give to the amount of electricity / gas you use in your home?
Q. Would you like to know more about the most effective ways to use energy more efficiently in your home?
Base: Financially stable homeowners n=328, Lower income homeowners n=601, Financially stable non-homeowners n=78, Financially challenged non-homeowners n=446

▲▼ Significantly higher/lower than others

# The segment picture – Impetus to act

Financially challenged segments have a greater financial need to act around their energy use.

| | Financially challenged homeowners | Financially stable homeowners | Financially challenged non-homeowners | Financially stable non-homeowners |
|---|---|---|---|---|
| Monthly electricity bill (approx.) | $206 | ▲$217 | ▼$189 | $217 |
| Worry about lack of control over energy bills | ▲55% | ▼39% | 50% | 44% |
| Minimising cost is main reason for thinking about energy | ▲90% | ▼80% | 87% | 90% |

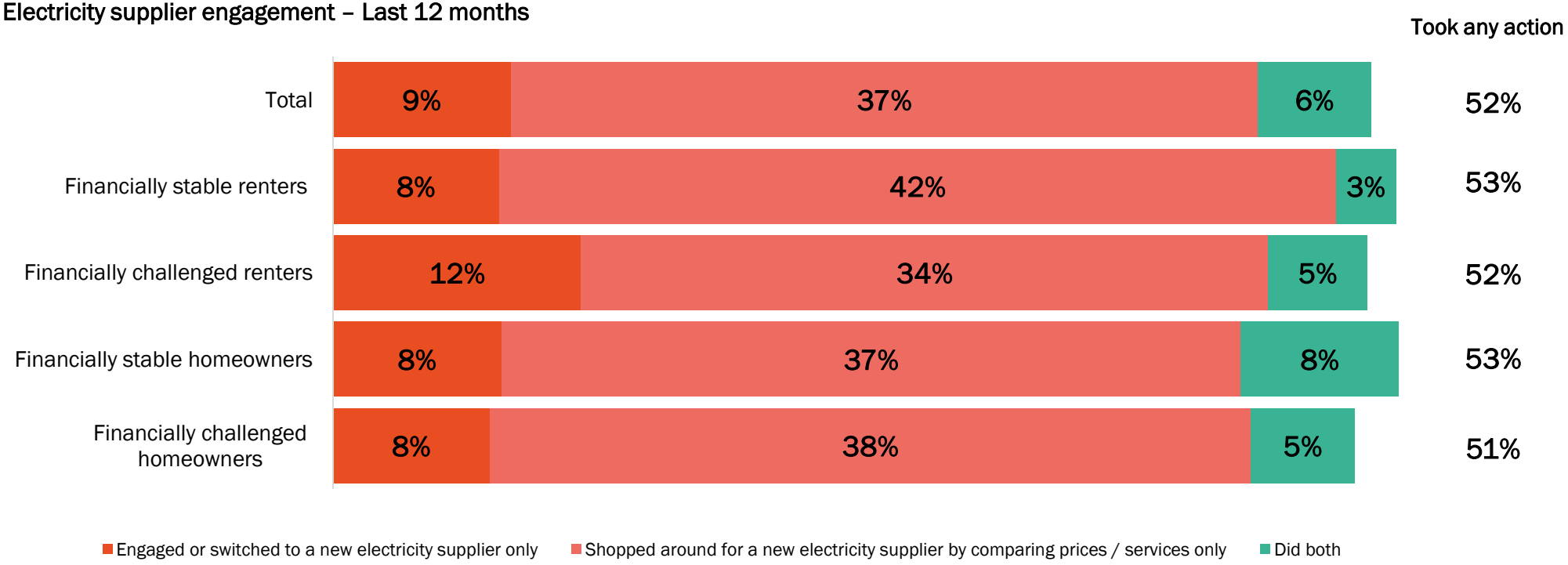
Q. How much is your household's monthly electricity bill?
Q. To what extent do you agree or disagree with the following in relation to your gas/electricity bills? I worry about my lack of control over energy bills (NETT Agree + Strongly Agree)
Q. You said that you [pay a lot of / pay a fair amount of] attention to the amount of energy you use in your home. What is the main reason for this?
Base: Financially stable homeowners n=223 to 319, Lower income homeowners n=446 to 576, Financially stable non-homeowners n=40 to 70, Financially challenged non-homeowners n=288 to 406

▲▼ Significantly higher/lower than others

# Within each segment, half have shopped around for a new electricity supplier

Whilst fewer than one in five have made a switch, people are actively engaging around the cost of their bill.

**Electricity supplier engagement – Last 12 months**

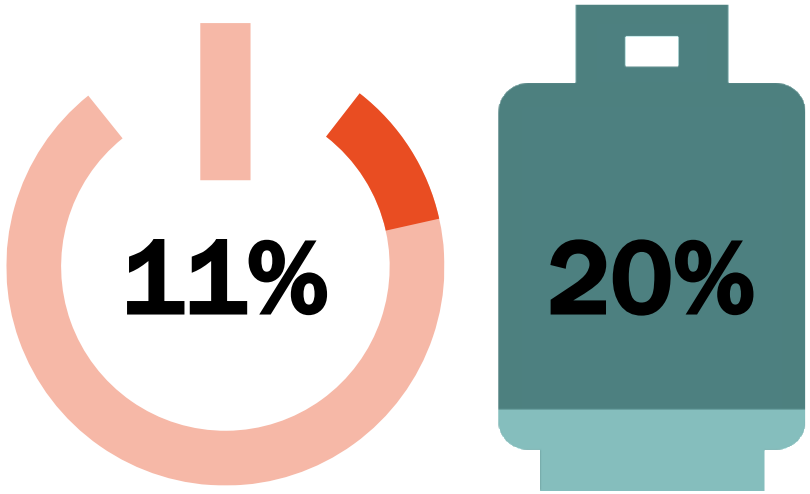



Q. Have you done any of the following in the past 12 months?
Base electricity users: Financially stable homeowners n=292, Financially challenged homeowners n=524, Financially stable non-homeowners n=48 Financially challenged non-homeowners n=297

# And this is because electricity is seen as expensive, despite being ‘efficient’

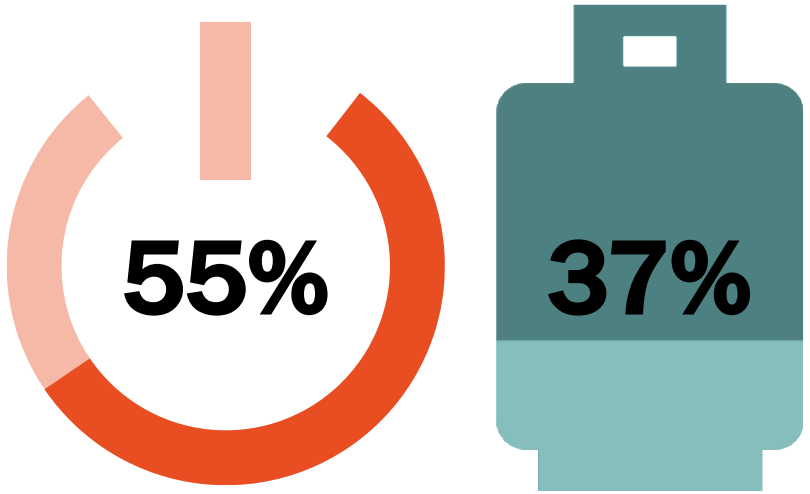
An association of being cheaper as an energy option will make gas more appealing to all segments, but particularly to financially challenged segments.

Association – Cheap




Electricity Gas

Association – Efficient



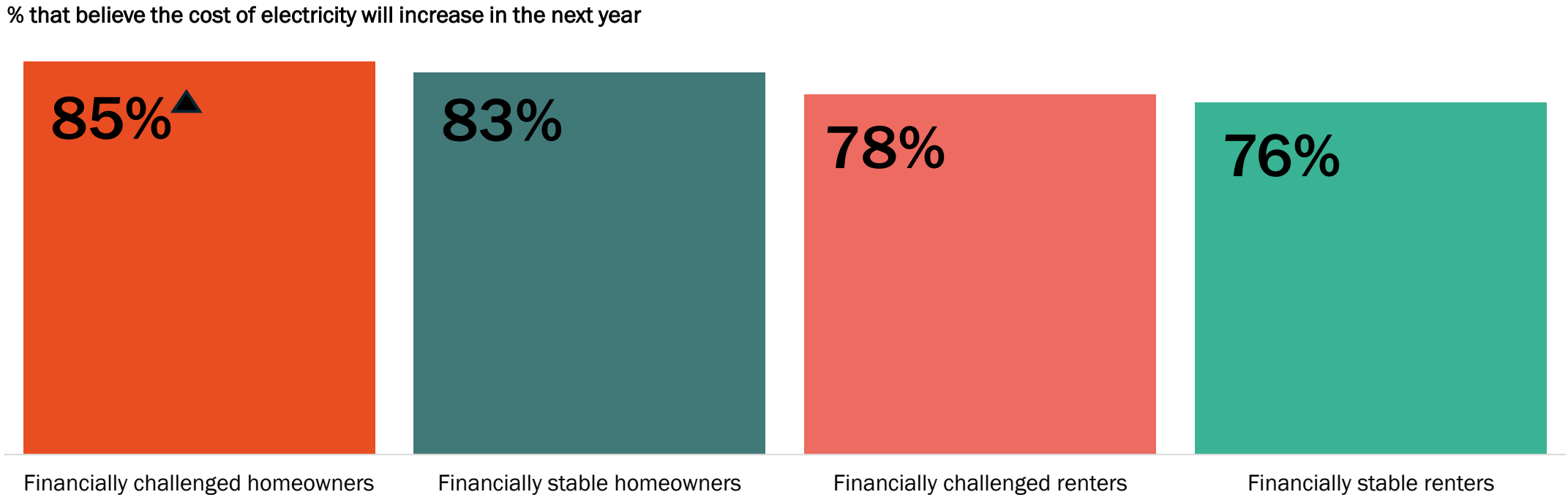

Electricity Gas

Financially challenged homeowners are more likely than others to see gas as an efficient option.

Q. We’d like you to think about different forms of energy you could use at home. Please choose the words that you most associate with Electricity/Gas.
Base electricity - Total n=619. Base gas - Total n=621.

# All groups believe that the cost of electricity will keep going up

Financially challenged homeowners are the most likely to believe this.



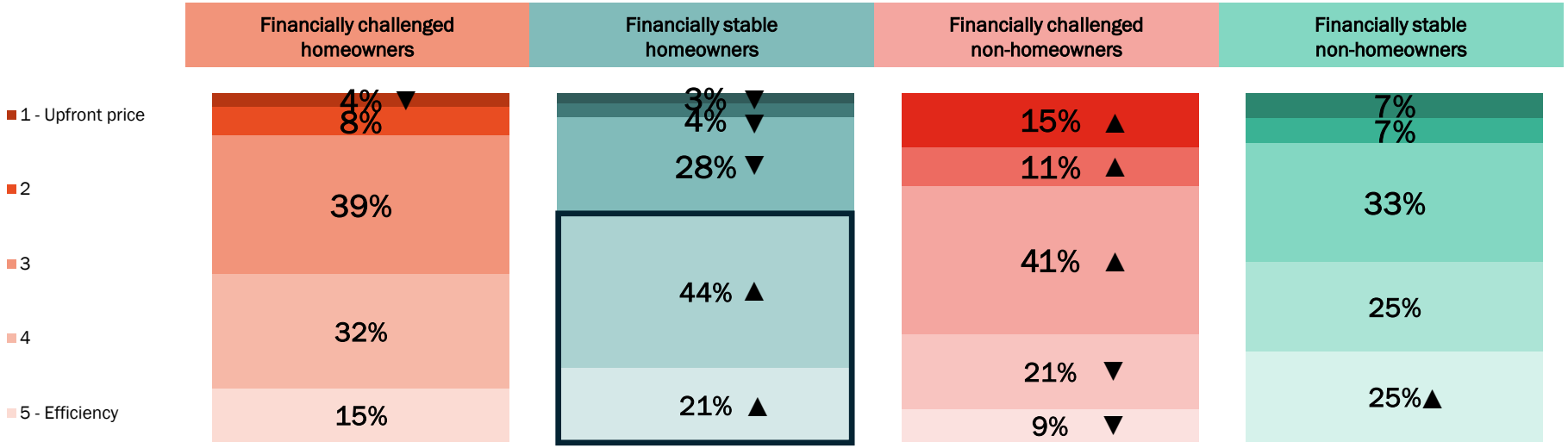

Q. To what extent do you expect the price of the following to change in the next year?
Base Electricity users.: Higher income homeowners n=309, Lower income homeowners n=563, Higher income non-homeowners n=66, Lower income non-homeowners n=382

▲▼ Significantly higher/lower than others

# High income homeowners are more likely to put effort into researching and purchasing efficient products

This is despite financially challenged homeowners recognising the importance of efficiency.

**Prioritisation of upfront price vs efficiency when buying appliances**




**Beliefs around efficiency and purchase behaviour (NETT Agree)**

| | Financially challenged homeowners | Financially stable homeowners | Financially challenged non-homeowners | Financially stable non-homeowners |
|---|---|---|---|---|
| I'm willing to put in time and effort into researching energy efficiency for my home | 61% | 68% ▲ | 52% ▼ | 48% |
| New home technology excites me | 44% ▼ | 58% ▲ | 43% | 50% |
| It is important we all adopt ways of being more energy efficient | 80% ▲ | 77% | 74% ▼ | 82% |

▲▼ Significantly higher/lower than others

Q. Thinking about if you were purchasing a large household appliance such as a washing machine or dishwasher. Where would you place yourself on the following scale? 1 - I would typically go for the cheaper option and wouldn't factor in how energy efficient an appliance was / its run. 5 - I would typically go for a more expensive appliance if it was more energy efficient and cheaper to run long-term
Q. How much do you agree or disagree with the following statements?
Base: Financially stable homeowners n=328, Financially challenged homeowners n=601, Financially stable non-homeowners n=78, Financially challenged non-homeowners n=446

# Financially challenged homeowners have the highest awareness of low-cost actions

| Low-cost renewable / efficiency actions aware of | Financially challenged homeowners | Financially stable homeowners | Financially challenged non-homeowners | Financially stable non-homeowners |
|---|---|---|---|---|
| Reduce hot water use (e.g. shorter showers) | 78% | 77% | 77% | 75% |
| Use cold water laundry washes | 79% | 77% | 76% | 68% |
| Close curtains at sunset / in the evening to keep in the warmth | 82% ▲ | 73% | 74% | 66% ▼ |
| Turn off appliances that are not in use e.g. second fridge, heated towel rails | 75% | 78% | 72% | 70% |
| Only heat or cool the rooms you're using | 77% ▲ | 72% | 63% ▼ | 73% |
| Fill the dishwasher and washing machine fully before using | 74% ▲ | 74% ▲ | 55% ▼ | 56% ▼ |
| Use appliances at off-peak times (e.g. in the evening / overnight when demand is lower) | 58% | 59% | 51% ▼ | 48% |
| Clean your heat pump filter | 61% ▲ | 60% ▲ | 44% ▼ | 44% ▼ |
| Use more alternatives to driving e.g. cycling, scooting, walking or using public transport | 54% | 61% ▲ | 48% ▼ | 47% |
| Set your heating temperature to a maximum of 21°C | 56% ▲ | 55% | 44% ▼ | 54% |
| Set the temperature of your hot water to a maximum of 60°C | 54% ▲ | 42% | 37% ▼ | 27% ▼ |

Q. Before today, were you aware of any of the following actions you could take to make your household energy use more efficient or increase your use of renewable energy?
Base: Financially stable homeowners n=328, Financially challenged homeowners n=601, Financially stable non-homeowners n=78,
Financially challenged non-homeowners n=446

▲▼ Significantly higher/lower than others

# Financially challenged homeowners are also more likely to be taking low-cost actions

| Low-cost renewable / efficiency actions done always / almost always | Financially challenged homeowners | Financially stable homeowners | Financially challenged non-homeowners | Financially stable non-homeowners |
|---|---|---|---|---|
| Reduce hot water use (e.g. shorter showers) | 48% | 41% | 47% | 46% |
| Use cold water laundry washes | 66% | 57% ▼ | 66% | 59% |
| Close curtains at sunset / in the evening to keep in the warmth | 74% ▲ | 63% ▼ | 63% ▼ | 55% ▼ |
| Turn off appliances that are not in use e.g. second fridge, heated towel rails | 59% | 56% | 57% | 57% |
| Only heat or cool the rooms you're using | 68% ▲ | 61% | 53% ▼ | 64% |
| Fill the dishwasher and washing machine fully before using | 65% ▲ | 66% ▲ | 43% ▼ | 52% |
| Use appliances at off-peak times (e.g. in the evening / overnight when demand is lower) | 27% | 30% | 26% | 20% |
| Clean your heat pump filter | 37% ▲ | 39% ▲ | 17% ▼ | 16% ▼ |
| Use more alternatives to driving e.g. cycling, scooting, walking or using public transport | 15% ▼ | 25% ▲ | 19% | 17% |
| Set your heating temperature to a maximum of 21°C | 40% ▲ | 39% | 28% ▼ | 32% |
| Set the temperature of your hot water to a maximum of 60°C | 43% ▲ | 36% | 25% ▼ | 22% ▼ |

Q. And how often, if ever, do you do these in order to make your household energy use more efficient or increase your use of renewable energy?
Base: Financially stable homeowners n=328, Financially challenged homeowners n=601, Financially stable non-homeowners n=78, Financially challenged non-homeowners n=446

▲▼ Significantly higher/lower than others

# When it comes to awareness of investment action, this is firmly anchored in Homeownership

| Renewable / efficiency investments aware of | Financially challenged homeowners | Financially stable homeowners | Financially challenged non-homeowners | Financially stable non-homeowners |
|---|---|---|---|---|
| Install double glazed windows | 73% ▲ | 77% ▲ | 58% ▼ | 68% |
| Ensure your home is well-insulated, including walls, underfloor and roof insulation | 79% ▲ | 69% | 58% ▼ | 57% ▼ |
| Install LED lighting in your home | 73% ▲ | 74% ▲ | 53% ▼ | 53% ▼ |
| Install a heat pump | 69% ▲ | 70% ▲ | 55% ▼ | 61% |
| Purchase appliances with a high Energy Rating Label rating | 67% ▲ | 64% | 52% ▼ | 60% |
| Reduce draughts around windows and doors (e.g. sealing air leaks, using draught excluders) | 68% ▲ | 60% | 53% ▼ | 51% |
| Install solar panels meaning you can use more renewable energy | 56% ▲ | 56% | 45% ▼ | 50% |
| Insulate your water heater and pipes | 56% ▲ | 51% | 36% ▼ | 29% ▼ |
| Use a battery electric vehicle, plug-in hybrid vehicle, or hybrid vehicle | 44% | 50% ▲ | 40% ▼ | 41% |
| Install an electric cooktop (either induction or resistance) | 44% ▲ | 48% ▲ | 28% ▼ | 35% |
| Install a fixture on taps / shower heads to reduce the amount of water used (low-flow fixtures) | 39% ▲ | 40% | 29% ▼ | 32% |
| Install a hot water heat pump water heater | 26% | 26% | 21% | 21% |
| Use a timer for your water heater (so it is automatically switched off during times of the day when hot water not needed) | 23% | 30% ▲ | 22% | 14% ▼ |
| Install a programmable or 'smart' thermostat to adjust the temperature based on your schedule, reducing heating when it's not needed | 22% | 35% ▲ | 19% ▼ | 10% ▼ |

Q. Before today, were you aware of any of the following actions you could take to make your household energy use more efficient or increase your use of renewable energy?
Base: Financially stable homeowners n=328, Financially challenged homeowners n=601, Financially stable non-homeowners n=78,
Financially challenged non-homeowners n=446

▲▼ Significantly higher/lower than others

# The types of actions taken by homeowner segments differ by financial position

Financially stable homeowners are more likely to have made some of the less common investments, such as EVs and smart thermostats.

| Renewable / efficiency investments made | Financially challenged homeowners | Financially stable homeowners |
|---|---|---|
| Install double glazed windows | 39% | 39% |
| Ensure your home is well-insulated, including walls, underfloor and roof insulation | 67% ▲ | 57% ▼ |
| Install LED lighting in your home | 64% | 60% |
| Install a heat pump | 55% | 52% |
| Purchase appliances with a high Energy Rating Label rating | 56% | 52% |
| Reduce draughts around windows and doors (e.g. sealing air leaks, using draught excluders) | 54% ▲ | 44% ▼ |
| Install solar panels meaning you can use more renewable energy | 9% | 8% |
| Insulate your water heater and pipes | 37% ▲ | 28% ▼ |
| Use a battery electric vehicle, plug-in hybrid vehicle, or hybrid vehicle | 10% ▼ | 19% ▲ |
| Install an electric cooktop (either induction or resistance) | 30% | 32% |
| Install a fixture on taps / shower heads to reduce the amount of water used (low-flow fixtures) | 21% | 20% |
| Install a hot water heat pump water heater | 8% | 10% |
| Use a timer for your water heater (so it is automatically switched off during times of the day when hot water not needed) | 8% | 9% |
| Install a programmable or 'smart' thermostat to adjust the temperature based on your schedule, reducing heating when it's not needed | 9% ▼ | 17% ▲ |

Q. And which, if any, have you done?
Base: Financially stable homeowners n=328, Financially challenged homeowners n=601

▲▼ Significantly higher/lower than others shown

# Summary

Each segment has a unique combination of attitudes, knowledge, and behaviours around energy use.

Financially stable homeowners are empowered in their decision making but lack urgency to act. There are a number of further low cost and investment energy actions in the home this segment could be taking.

Financially challenged homeowners are both empowered and have the urgency to act. They are generally taking a high number of actions, but upfront cost outweighs the perceived benefit of ongoing efficiency.

Financially stable non-homeowners have the financial means to make positive energy decisions but aren't able to make all of the same investments that homeowners can. Based on financial position, this group are the most likely to become future homeowners, so their energy attitudes long-term will be important.

Financially challenged non-homeowners are not currently empowered, and don't have the same level of means to make investment changes as other segments. For this group, simply knowing more of the low-cost actions they could take to improve efficiency would be beneficial.

# Appendix

# Changes around household energy moving into the summer months

There is less worry around energy bills, and less of a felt need to focus on actions to warm the home.

| | Q3 2024 | Q4 2024 |
|---|---|---|
| Monthly electricity bill (average) | $215 | ▼$194 |
| % that believe their home is warm and cosy (4 or 5 out of 5) vs cold and draughty | 51% | ▲59% |
| Worry about lack of control over energy bills (NETT Agree) | 53% | ▼45% |
| % aware of action to improve efficiency - ‘Close curtains at sunset / in the evening to keep in the warmth’ | 79% | ▼75% |
| % taking action always / almost always - ‘Close curtains at sunset / in the evening to keep in the warmth’ | 70% | ▼65% |

▲▼ Significantly higher/lower than previous quarter

EECA

Q. How much is your household's monthly electricity bill?
Q. Thinking about your home (rather than how much you heat it), would you say that your house is cold and draughty or warm and cosy? (5-point scale; 1 = Cold and draughty; 5 = Warm and cosy)
Q. To what extent do you agree or disagree with the following in relation to your gas/electricity bills? I worry about my lack of control over energy bills (NETT Agree + Strongly Agree)
Q. Before today, were you aware of any of the following actions you could take to make your household energy use more efficient or increase your use of renewable energy?
Q. And how often, if ever, do you do these in order to make your household energy use more efficient or increase your use of renewable energy?
Base: Total sample Q3 2024 n=638 to 760, Q4 2024 n=721 to 790

# Changes in energy beliefs

There is an increasing anticipation that the price of petrol/diesel will increase in the next year.

| % that believe... | Q3 2024 | Q4 2024 |
|---|---|---|
| 'Making sure extreme weather events don't impact power supply' is important for NZ's future energy | 84% | ▼79% |
| The price of petrol/diesel will increase in the next year (NETT Increase) | 67% | ▲74% |
| Electricity is environmentally friendly | 38% | ▼30% |

▲▼ Significantly higher/lower than previous quarter

Q. How important do you consider each of the following to be for the future of New Zealand's energy? (Scored 4 or 5 on a 5-point scale; 1 = Not at all important; 5 = Very important)
Q. To what extent do you expect the price of the following to change in the next year? Please answer as if your usage remains the same, so that any changes would be due to unit price changes. - The price of petrol / diesel. (NETT Increase a lot/ Increase a little)
Q. We'd like you to think about different forms of energy you could use at home. Please choose the words that you most associate with Electricity/Coal.
Base: Total sample Q3 2024 n=303 to 760, Q4 2024 n=316 to 790

EECA

# Other notable changes

| | Q3 2024 | Q4 2024 |
|---|---|---|
| % that would typically go for a more expensive appliance if more energy efficient and cheaper to run long-term (5 out of 5 score) | 17% | ▼13% |
| % that would talk to family and friends as a source for how to make their energy use more efficient | 34% | ▲42% |
| % aware of action to increase efficiency / renewable energy - 'Install a hot water heat pump water heater' | 22% | ▲27% |
| % who installed an electric cooktop because they were remodelling their home | 18% | ▲27% |

▲▼ Significantly higher/lower than previous quarter

Q. Thinking about if you were purchasing a large household appliance such as a washing machine or dishwasher. Where would you place yourself on the following scale? 1 - I would typically go for the cheaper option and wouldn't factor in how energy efficient an appliance was / its run. 5 - I would typically go for a more expensive appliance if it was more energy efficient and cheaper to run long-term
Q. Where would you look for information on actions that you could take to make your household energy use more efficient? (Asked of those who want to know more about how to make their energy use more efficient)
Q. Before today, were you aware of any of the following actions you could take to make your household energy use more efficient or increase your use of renewable energy?
Q. And why did you install an electric cooktop? (Asked of those who have installed an electric cooktop)
Base: Total sample Q3 2024 n=208 to 760, Q4 2024 n=192 to 790