

KANTAR PUBLIC

Electricity consumer sentiment survey – residential consumers and small businesses

2023 results

JULY 2023



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- Attitudes about the electricity sector
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- Knowledge about the electricity market

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- Key findings
- Small businesses' experiences in the electricity market
- Affordability
- Attitudes about the electricity sector
- Switching behaviours
- Knowledge about the electricity market

Research purpose

The Consumer Advocacy Council is an independent body established to advocate on behalf of small electricity consumers (households and small businesses).

These consumers face barriers to making their voices heard and influencing decisions that may affect them in relation to electricity provision. This is for a number of reasons:

1. The complexity of the sector
2. The time and resource required to be involved in decision making processes
3. Cultural differences and language barriers

It is the job of the Consumer Advocacy Council to effectively advocate for small consumers and navigate these barriers.

The Council commissioned Kantar Public to conduct research with households and small businesses in order to:

- gather information to provide a baseline for future research
- understand small consumers' views regarding electricity in New Zealand, and
- create a high quality and robust survey which can be used to build understanding year on year and inform the Council's work.


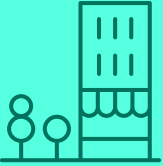
This report presents the results for the second survey and makes comparisons to the benchmark survey.



Key areas of interest are:

- Small consumers experiences with the electricity market
- Affordability
- Attitudes towards the electricity market
- Behaviours around switching plans and providers
- Knowledge about the electricity market















Methodology

	Fieldwork dates	Sample source	Number of online interviews	Survey length	Margin of error	Quotas
 Households	7 th – 27 th June, 2023	Kantar's consumer online research panel	1,000	13 minutes	Findings based on the full sample have a maximum margin of error of +/- 3.1% (at the 95% confidence level)	Quotas were set at a total level on age by gender, region, household size and ethnicity
 Small businesses (fewer than 20 employees)		Kantar's business online research panel	500	12 minutes	Findings based on the full sample have a maximum margin of error of +/- 4.4% (at the 95% confidence level)	Quotas were set on business size

- Any differences reported in this research are significant at the 95% confidence level, unless otherwise specified.
- Individual percentages do not always sum to the 'nett percentages'. This is due to rounding.



Compared to 2022, more NZ residents and small businesses are concerned about the resilience of New Zealand's electricity system to extreme weather events

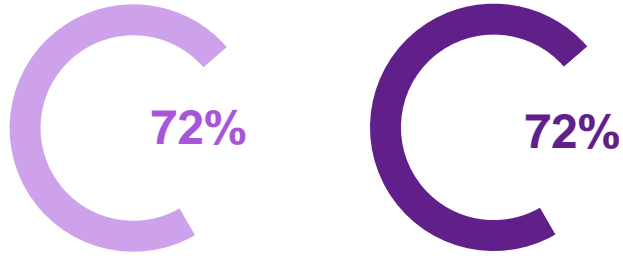
 Affordability	 82% of residents (80% in 2022)		 87% of small businesses (86% in 2022)
	feel that affordability as an important issue facing the sector.		
	 72% of residents (69% in 2022)		 62% of small businesses (57% in 2022)
	Are concerned that electricity will become unaffordable for some in the next 10 years.		
 A resilient electricity system	 78% of residents (74% in 2022)		 87% of small businesses (84% in 2022)
	feel that a resilient system is an important issue facing the sector		
	 65% of residents (57% in 2022)		 68% of small businesses (59% in 2022)
	Are concerned that the system will not be resilient to outages caused by extreme weather over the next 10 years.		

Residential results

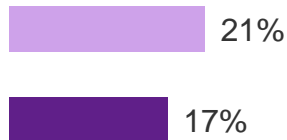


Experiences with electricity provider

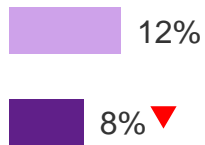
Overall satisfaction with electricity providers remains the same, however fewer New Zealanders are *very satisfied* with the service they receive.



% who are 'very satisfied' with their provider



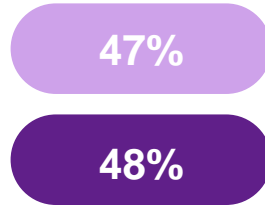
% who are 'very satisfied' with the cost of electricity



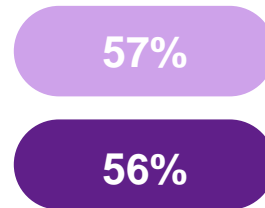
And fewer are 'very satisfied' with the cost of the electricity



Trust in electricity providers to do the right thing is unchanged.

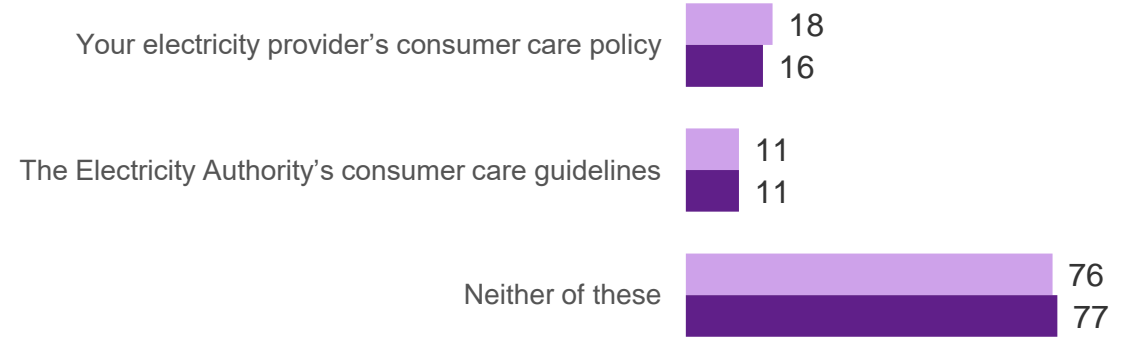


Value for money perceptions are also unchanged.



Knowledge about and confidence in the market

Like 2022, awareness of consumer care policy and guidelines is low.



But confidence in making decisions about providers and accessing enough and easily understood information has grown since 2022.

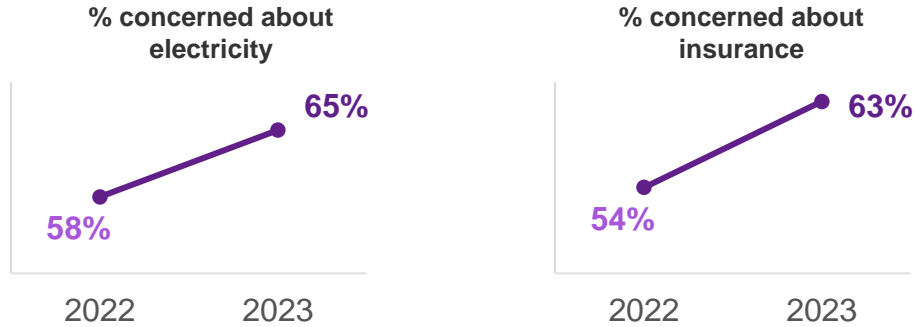
Confident (7-10)
2022 2023

	2022	2023
Make choices about which electricity providers and plans to use	58	65 ▲
Access enough information to make decisions about which electricity provider to use	55	61 ▲
Access information about electricity providers which is easy to understand	50	57 ▲
Resolve issues with your electricity provider	52	56

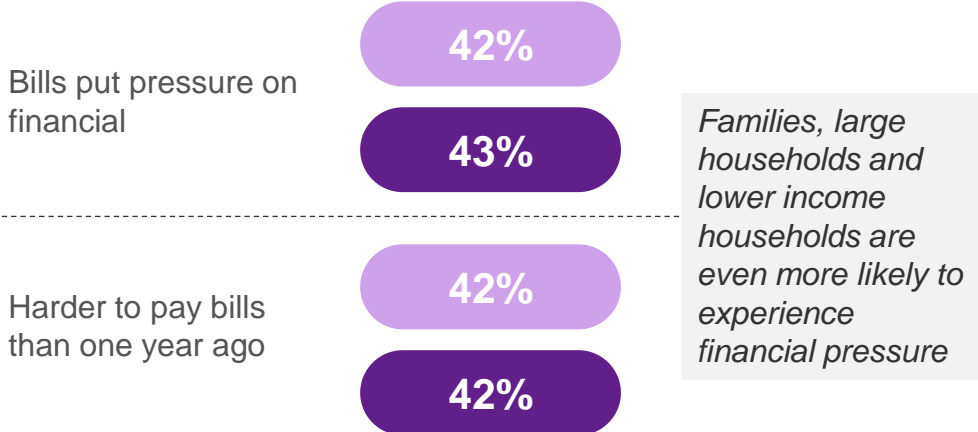
▲ ▼ Significantly higher/lower than 2022

Affordability

Compared to 2022, more New Zealanders are concerned about electricity and insurance costs.



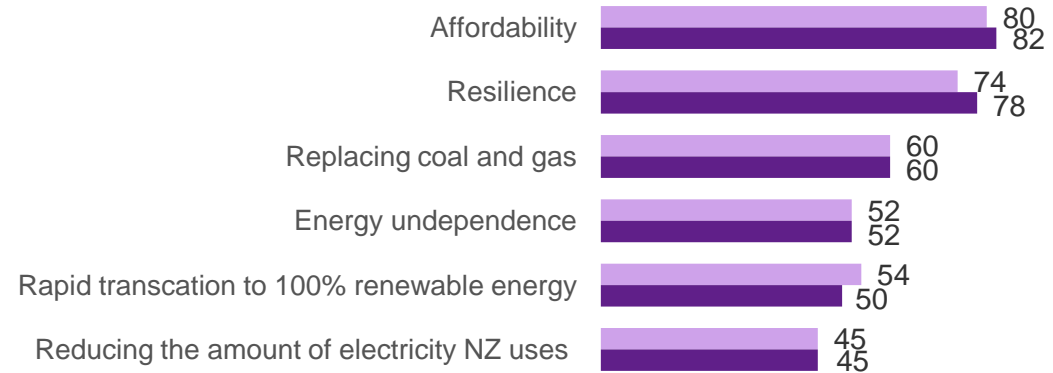
Four in 10 New Zealanders have experienced financial pressure in relation to their electricity bills.



2022 2023

Attitudes towards the electricity sector

Affordability and a resilient system remain the two most important issues for New Zealanders.



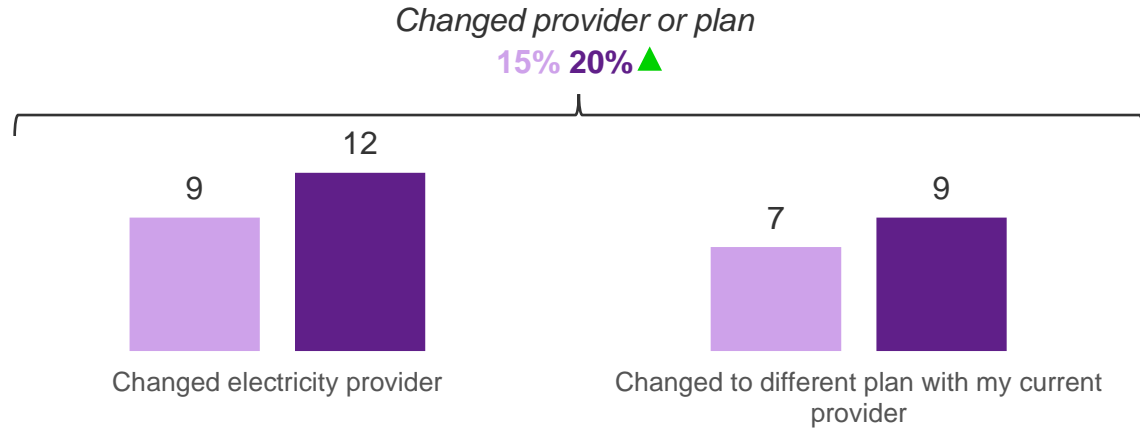
And in 2023, more New Zealanders are concerned the system will not be resilient to extreme weather over the next ten years.

% concerned about the future of New Zealand's electricity sector...	2022	2023
Electricity will become unaffordable for some New Zealanders	69	72
New Zealand's electricity system will not be resilient to extreme weather events resulting in frequent electricity outages	57	65 ▲
Electricity will become unaffordable for you	52	53
New Zealand won't have plans in place to replace or update coal and gas fired power plants	51	50
New Zealand won't have plans in place to move to an electricity system that is based on renewables	51	49

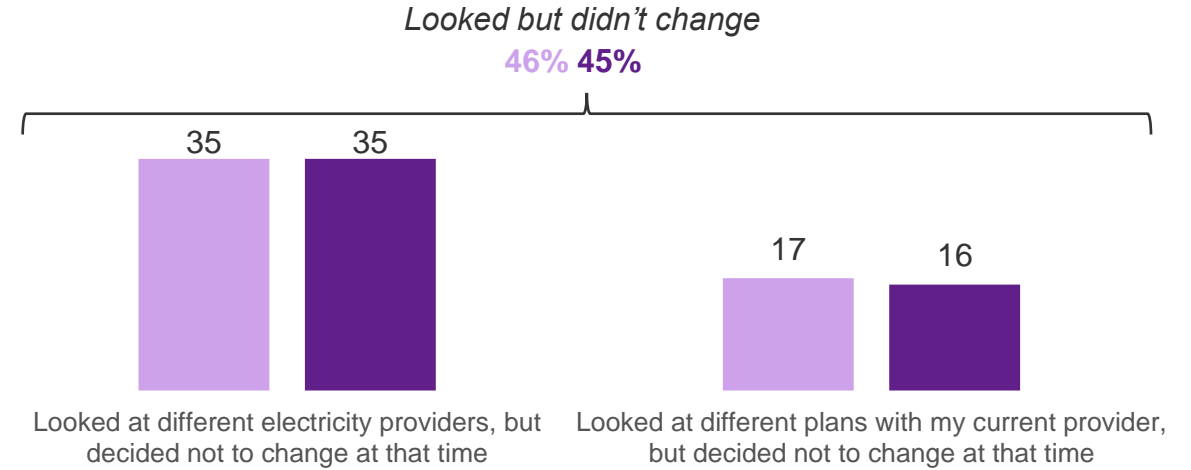
▲ ▼ Significantly higher/lower than 2022

Switching behaviour

Compared to 2022, more New Zealanders have changed plan or provider in the past 12 months.



Like 2022, nearly half of New Zealanders had a look at different providers/plans but decided not to switch.



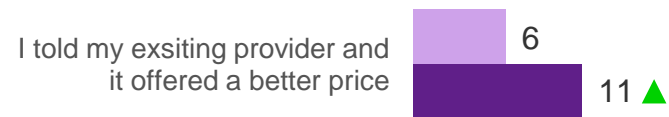
The main reason for switching is because the new provider offered better value for money – and the proportion who say this has increased since 2022.



In 2023, the main reason for this is because it was too difficult to work out if it would be cheaper and this has increased since 2022.



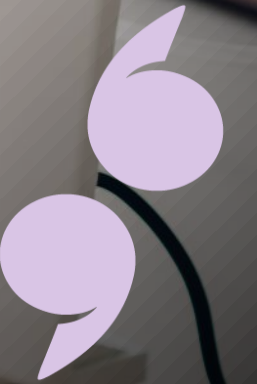
In 2023, more also mentioned being offered a better price by their existing provider as a reason for not switching.



▲ ▼ Significantly higher/lower than 2022

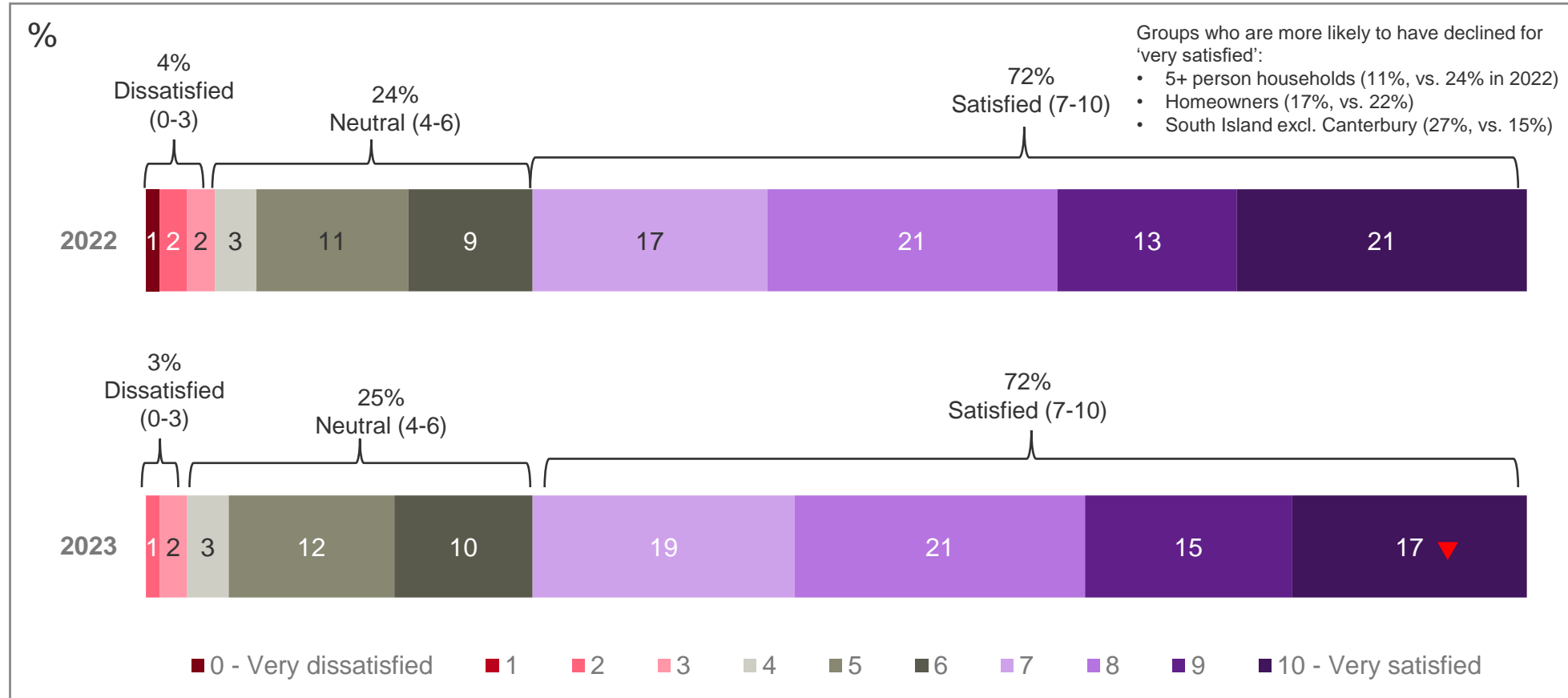
01

Residential experiences in the electricity market



Overall satisfaction is unchanged since 2022, however fewer New Zealanders are *very satisfied* with the service they received from their electricity provider in the past 12 months. Like 2022, older New Zealanders are the most satisfied, while younger, Māori, and Pacific peoples have lower levels of satisfaction.

Level of satisfaction with current provider



Groups who are more likely to have declined for 'very satisfied':

- 5+ person households (11%, vs. 24% in 2022)
- Homeowners (17%, vs. 22%)
- South Island excl. Canterbury (27%, vs. 15%)



Overall satisfaction higher among:

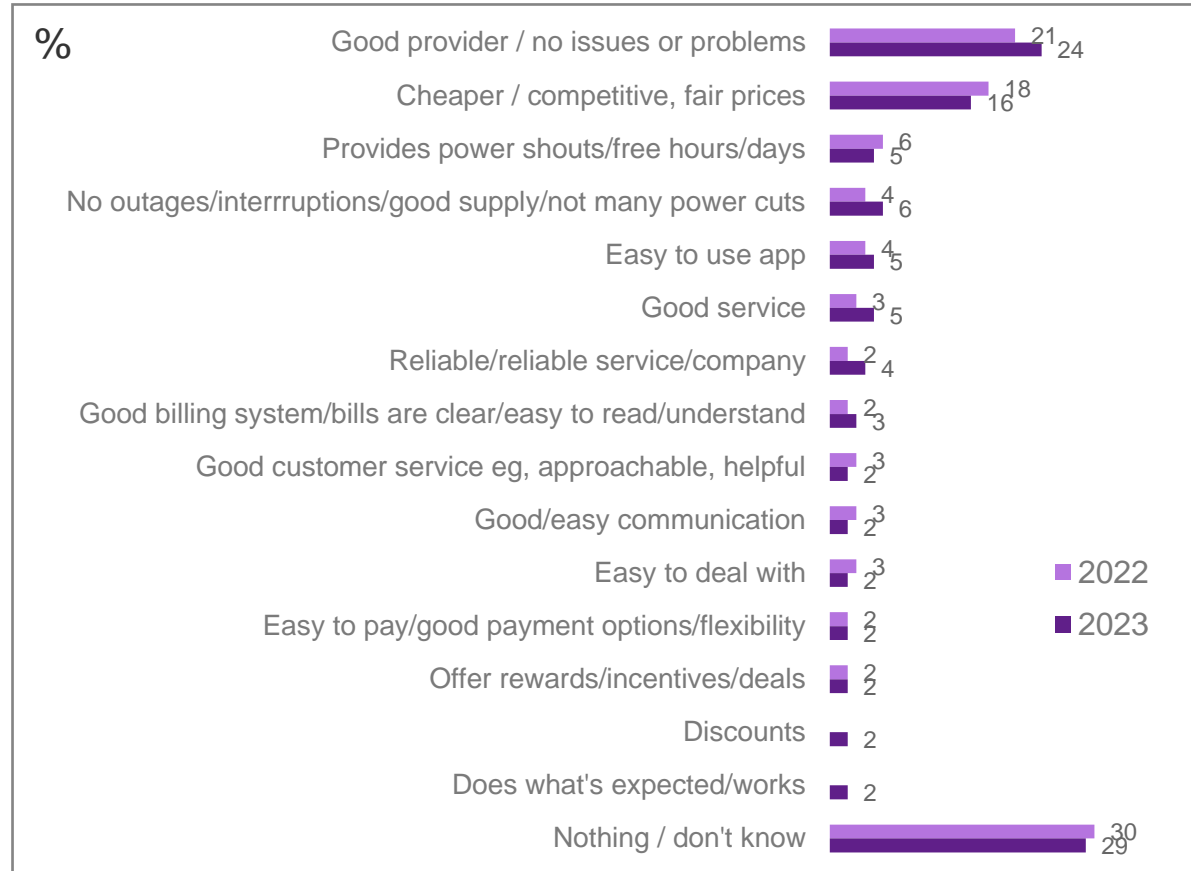
- Aged 60+ (79%)

Overall satisfaction lower among:

- Aged 30-39 (61%)
- Māori (64%)
- Pacific peoples (59%)

On the previous slide we saw 72% of New Zealanders were satisfied with their current provider. Like 2022, the main reasons they gave for being satisfied were feeling they have a good provider with no issues or problems and cheaper / competitive prices. Ease also comes through as a theme for feeling satisfied, whether that is around communication, ease of payment or with the dealings households have had with their providers.

Reasons for being satisfied with current provider (coded responses)



“

Easy to understand accounts, Super easy mobile app, Competitive pricing.

Get free electricity for 3 hours everyday. The bill is very affordable and probably one of the cheapest around if not the cheapest.

I have had no problems with the service they provide and are always accommodating when I have to change my payment date to coincide with my pay.

They are fighting for fairer pricing and appear to be taking on the root issues on the price increases.

I have never encountered any problems with them power is always supplied apart from time to time when there are outages, and it is usually when there is people working on the lines or bad weather event..

No issues with supply, in comparison to previous provider, extremely great value for money..

I moved house and it was super easy, they also offer hours of free power to claim when suits you.

I like the app where you can earn perks and the free power days.

On page 11, we saw 3% of New Zealanders are dissatisfied with their current provider. These people are most concerned about high prices. Those who mention power cuts has tripled since 2022.

Reasons for being dissatisfied with current provider (coded responses)



“

Power is so expensive, even when I'm currently not living at home my Power bill is expensive.

Expensive. And pay for electricity and a lines charge. Two bills for electricity.

Terrible customer service, constant complications, power cut off when it shouldn't be.

Too many power cuts during free power.

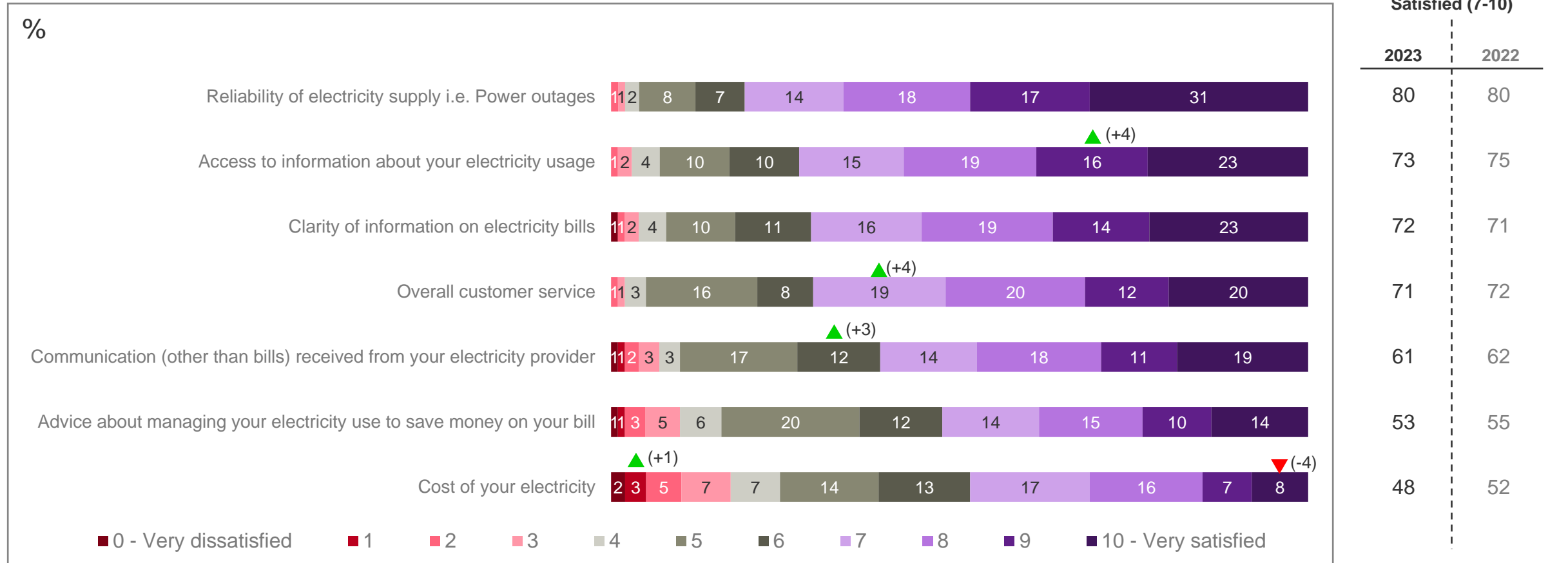
At least two unplanned outages every year, otherwise fine.

I found the prices were just unrealistic for the average household. My son and I work all day hardly ever home, I conserved power and paid \$50 a week and still I was in debt to them..

Too overly priced, very rarely get a meter reading.

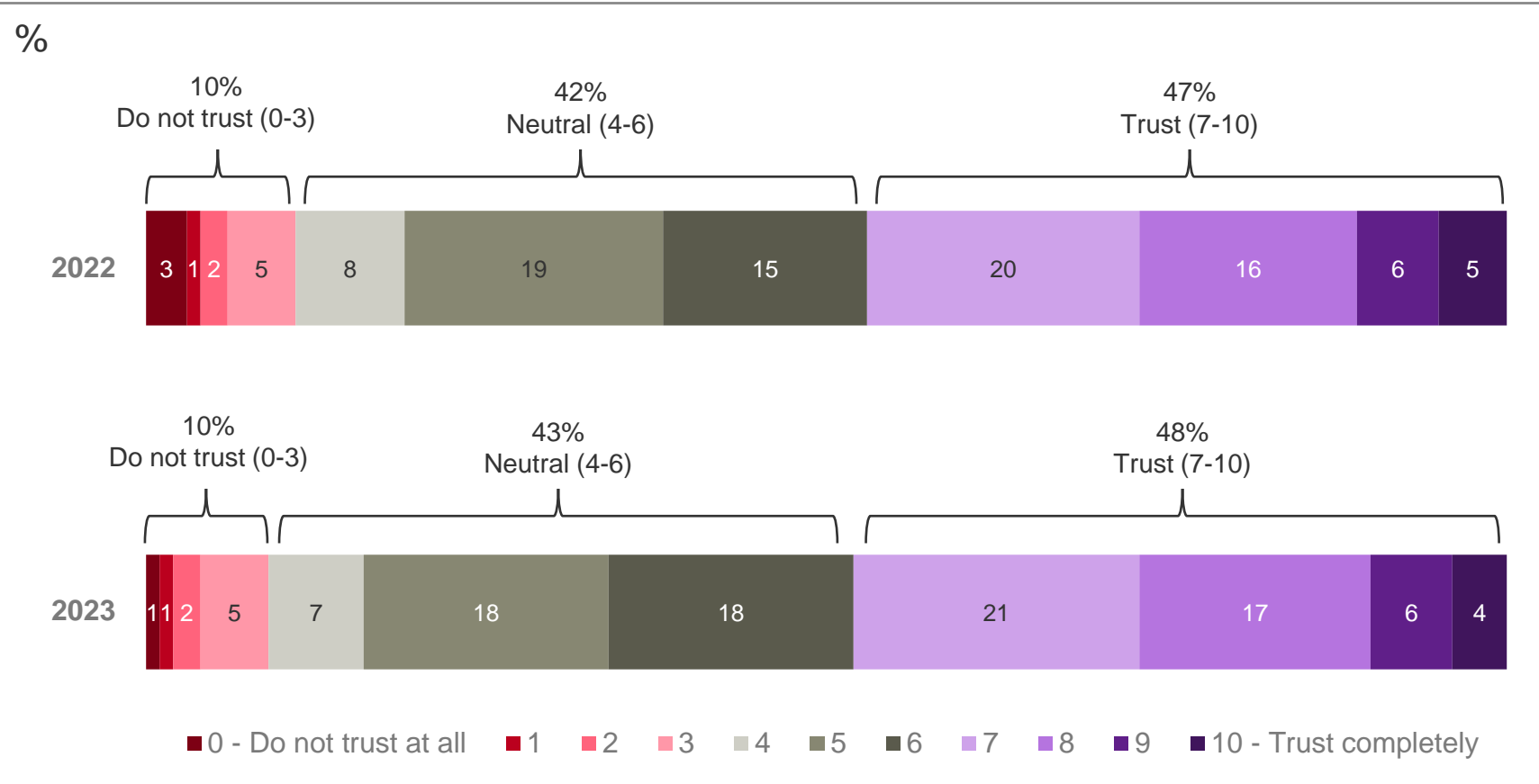
New Zealanders continue to be least satisfied with the cost of electricity, and the proportion who are very satisfied with this aspect of their service provision has declined since 2022 (8%, vs. 12% in 2022).

Level of satisfaction with different aspects of service provision



Trust levels are unchanged since 2022. Half of New Zealanders trust electricity providers to do the right thing by their customers; one in ten do not.

Trust in electricity providers to do the right thing



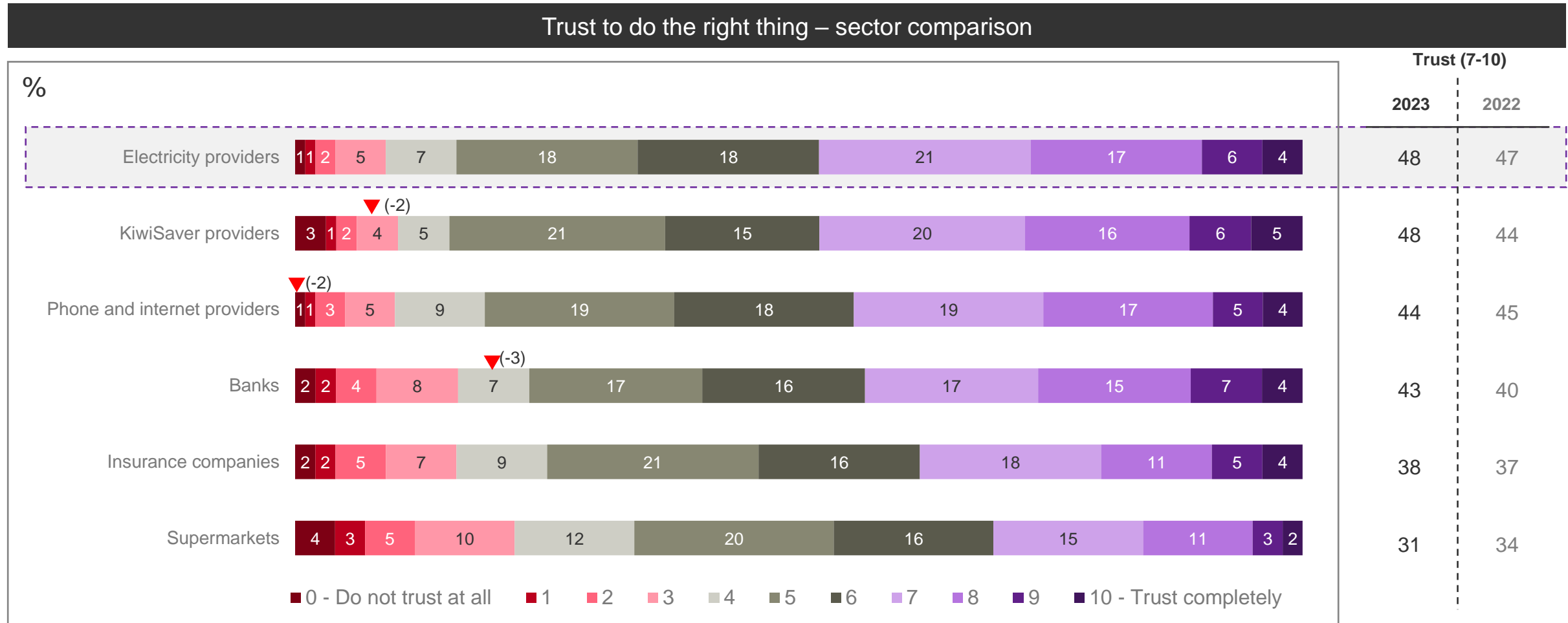
Trust higher among:

- Those satisfied with current provider (61%)
- Aged 70+ (64%, vs. 45% among those aged under 70)

Trust lower among:

- Māori (41%)
- Aged 30-49 (39%)
- Those dissatisfied with current provider (14%)

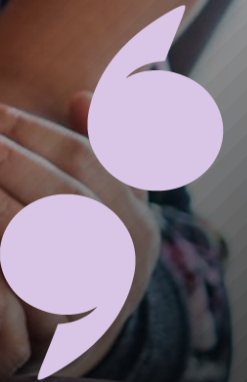
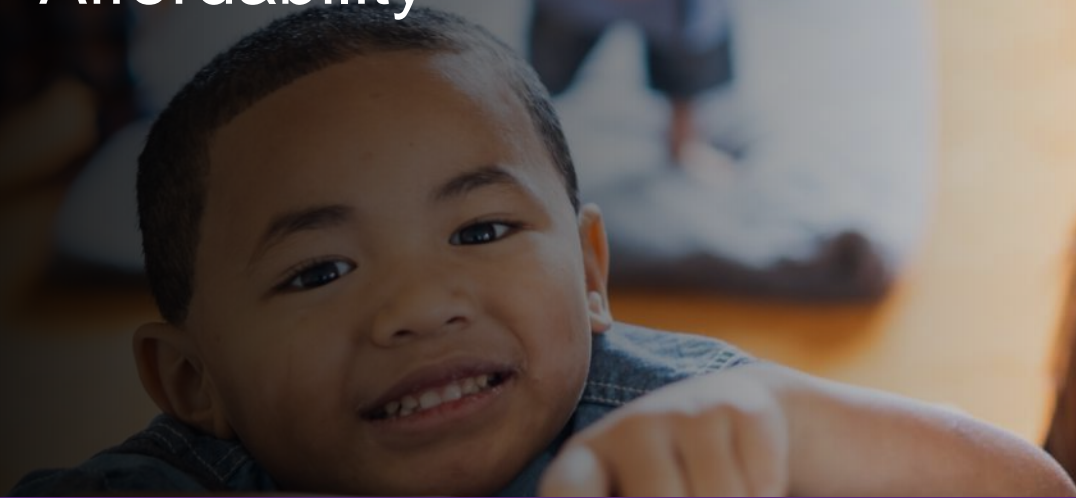
Compared to other sectors, trust for electricity providers is similar to that of Kiwisaver and phone/ internet providers. Like 2022, New Zealanders have the least amount of trust in insurance companies and supermarkets.



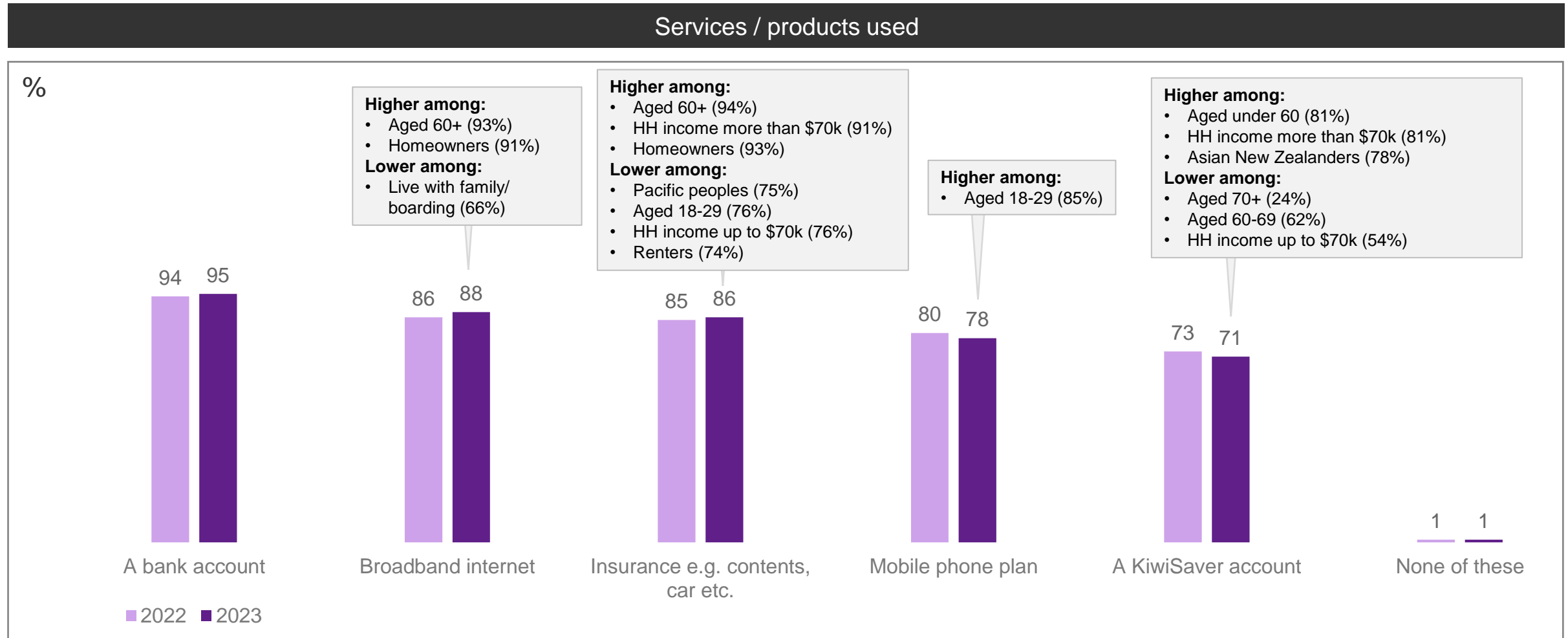
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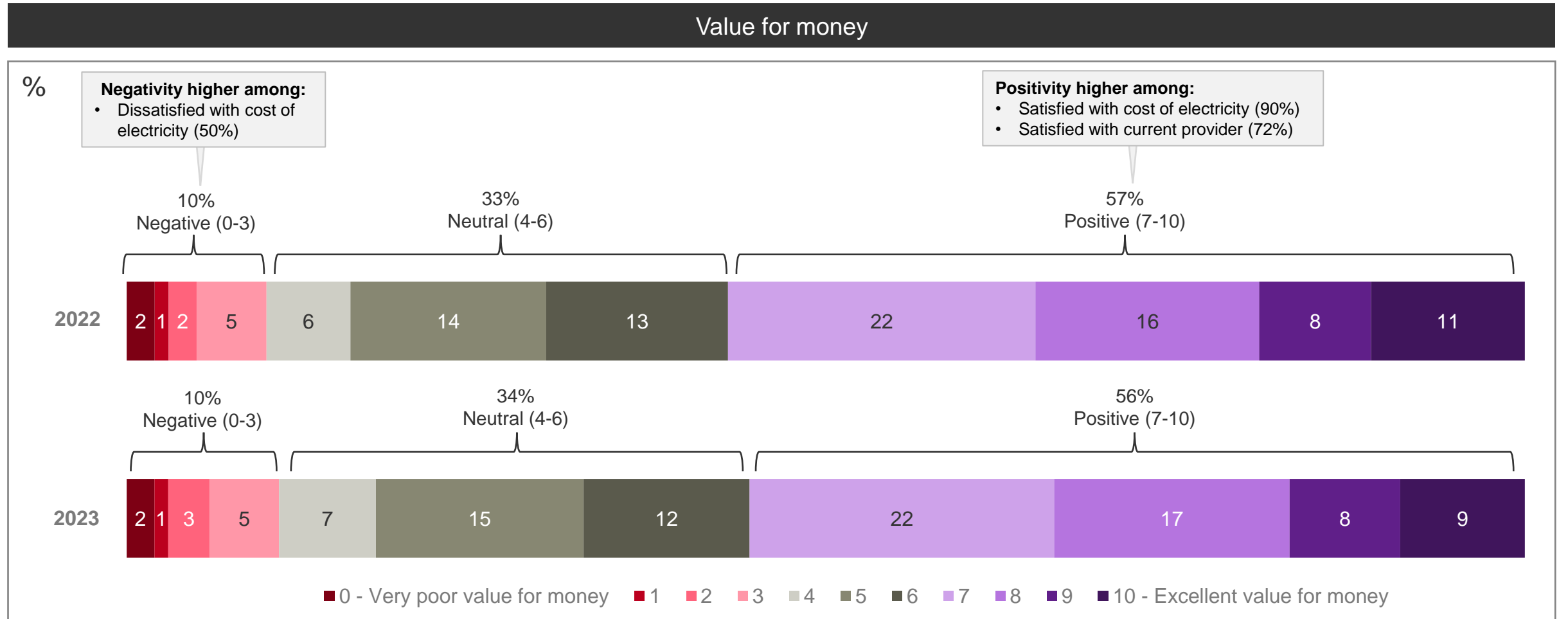
Affordability



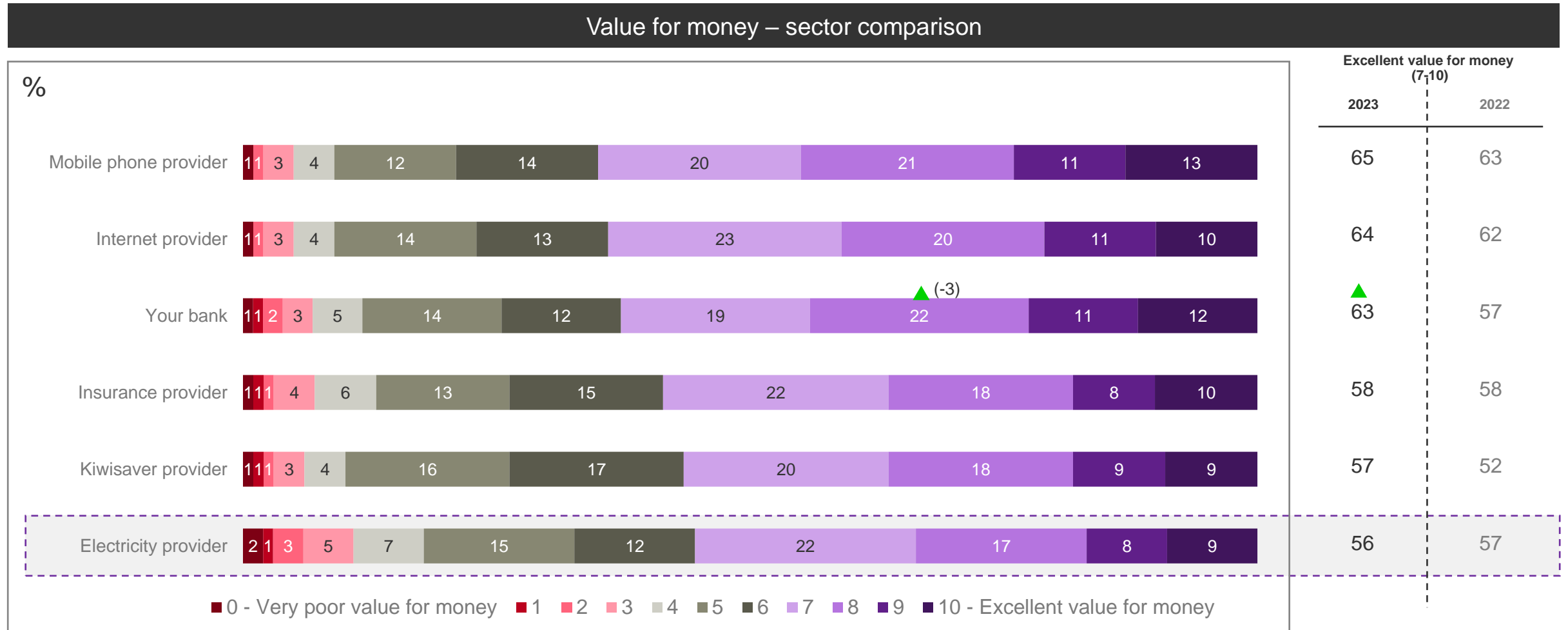
New Zealanders pay for a range of services / products alongside electricity.



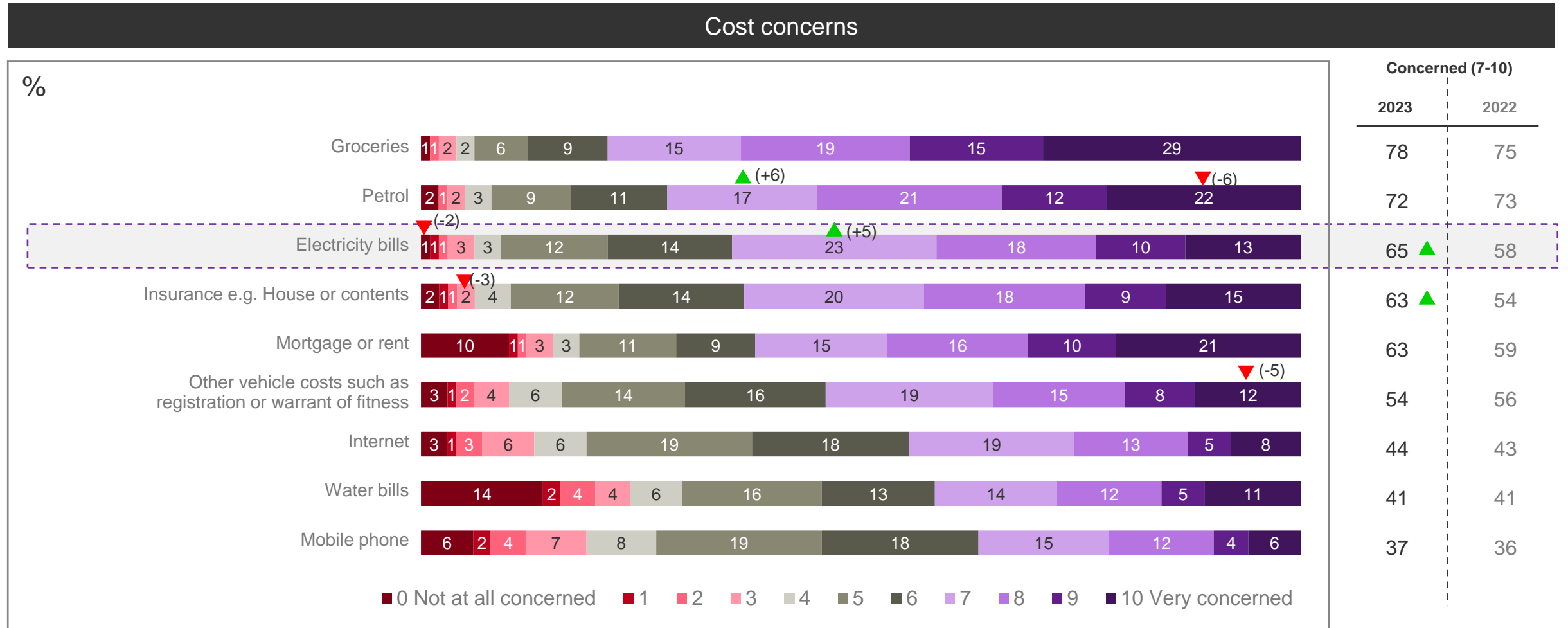
Value for money perceptions are consistent with 2022. Over half (56%) of New Zealanders received good value for money from their provider in the past 12 months while one in ten received poor value for money. Half of those who are dissatisfied with the cost of their electricity don't feel they are getting good value for money.



Since 2022, value for money perceptions of banks has improved, aligning them more with mobile phone and internet providers. Value for money perceptions of electricity providers are on par with insurance and Kiwisaver providers.

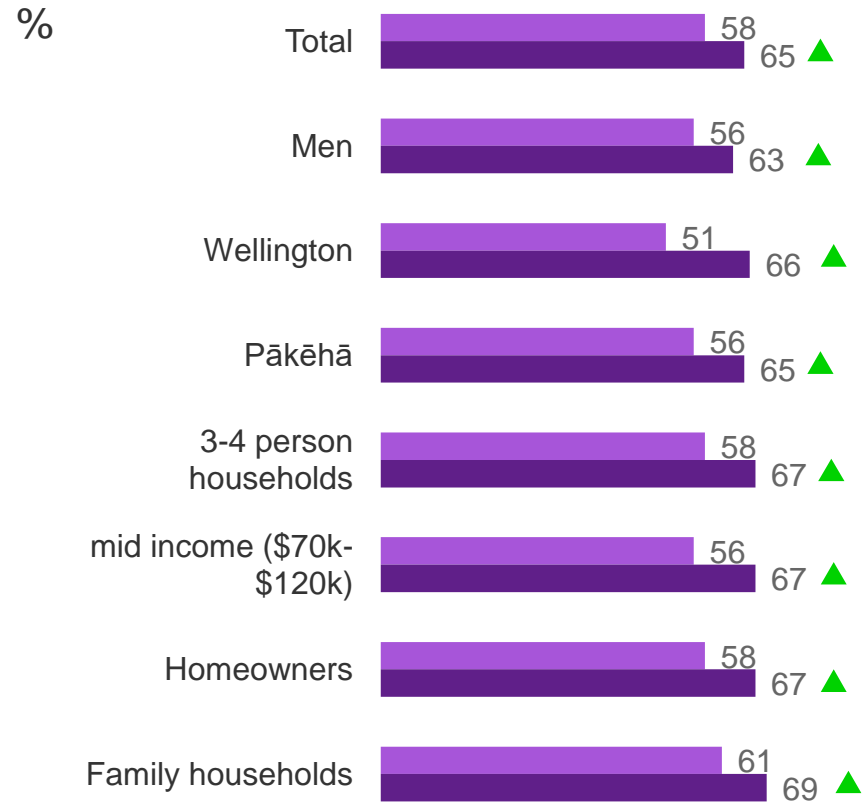


More New Zealanders are concerned about electricity and insurance costs than in 2022.



Groups who are more likely to have increased in concern for electricity and insurance costs since 2022.

Electricity costs

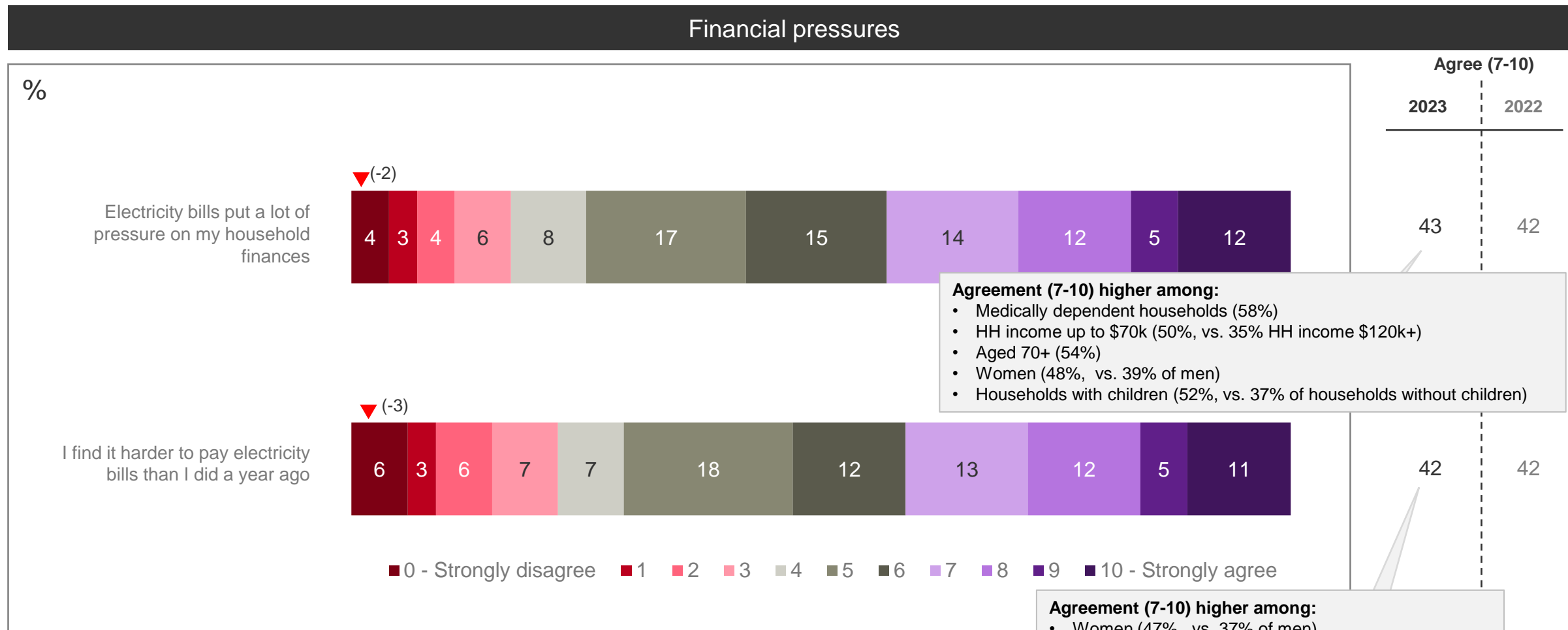


Insurance costs



2023 2022

New Zealanders' likelihood to be struggling with electricity bills is similar to 2022.

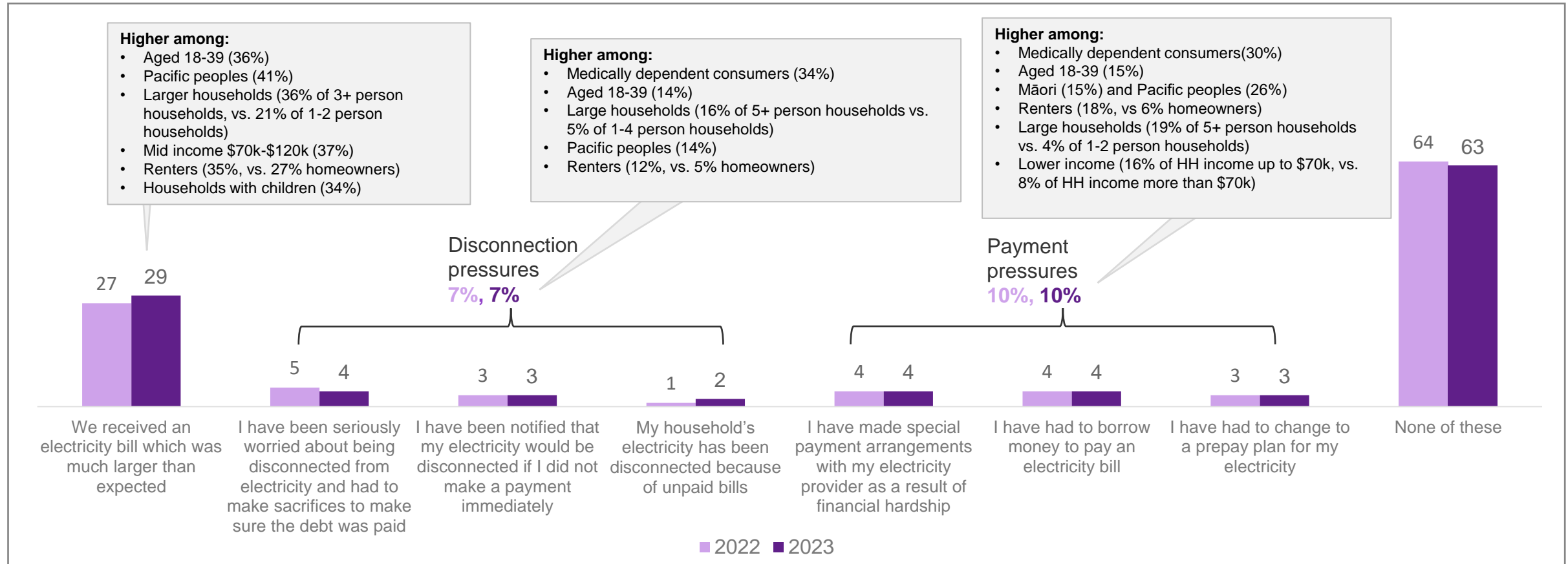


Agreement (7-10) higher among:

- Women (47%, vs. 37% of men)
- Larger households (52% of 3+ person households vs. 31% of 1-2 person households)
- HH income up to \$70k (52%) and renters (50%)
- Medically dependent households (56%)
- Households with children (52%)

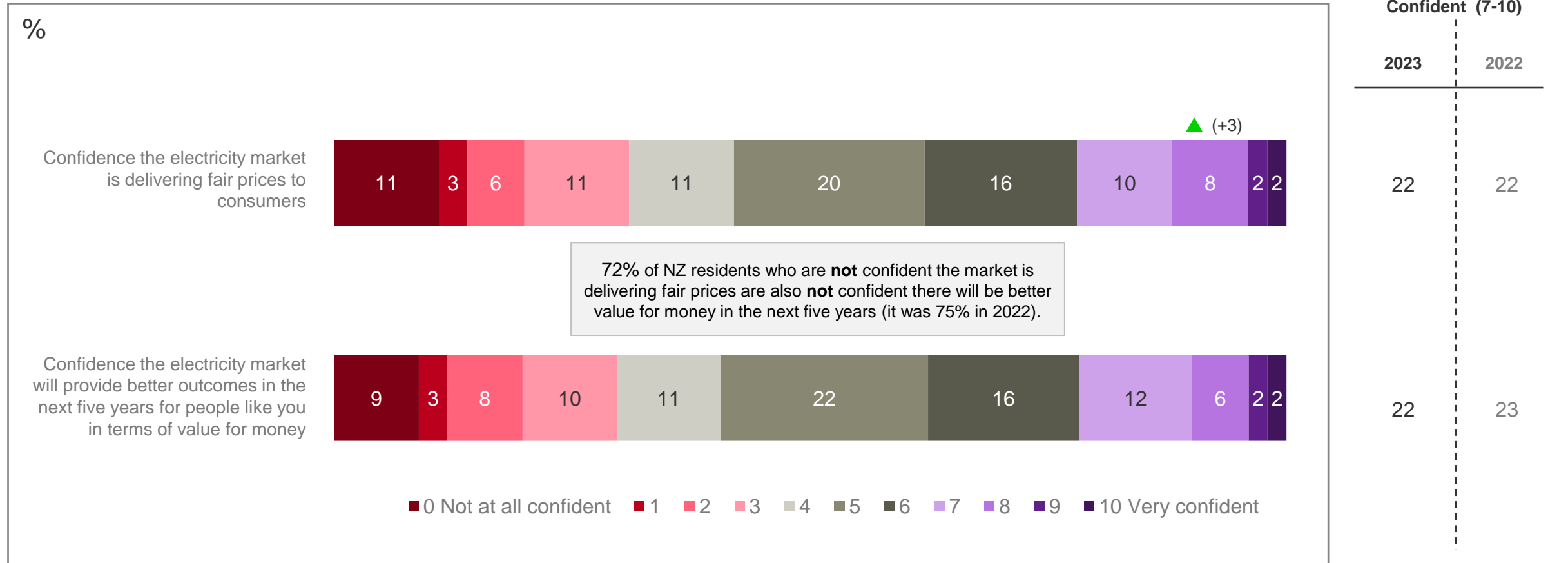
Compared to 2022, residential consumers are also just as likely to have experienced pressures regarding their electricity bill. Similar to 2022, larger, younger households, renters and vulnerable consumers are more likely to have experienced these types of pressures.

Pressures experienced in the past 12 months



Similar to 2022, just one in five New Zealanders are confident the sector is delivering fair prices to consumers or that this will improve in the next five years.

Confidence the electricity market delivers fair prices to consumers



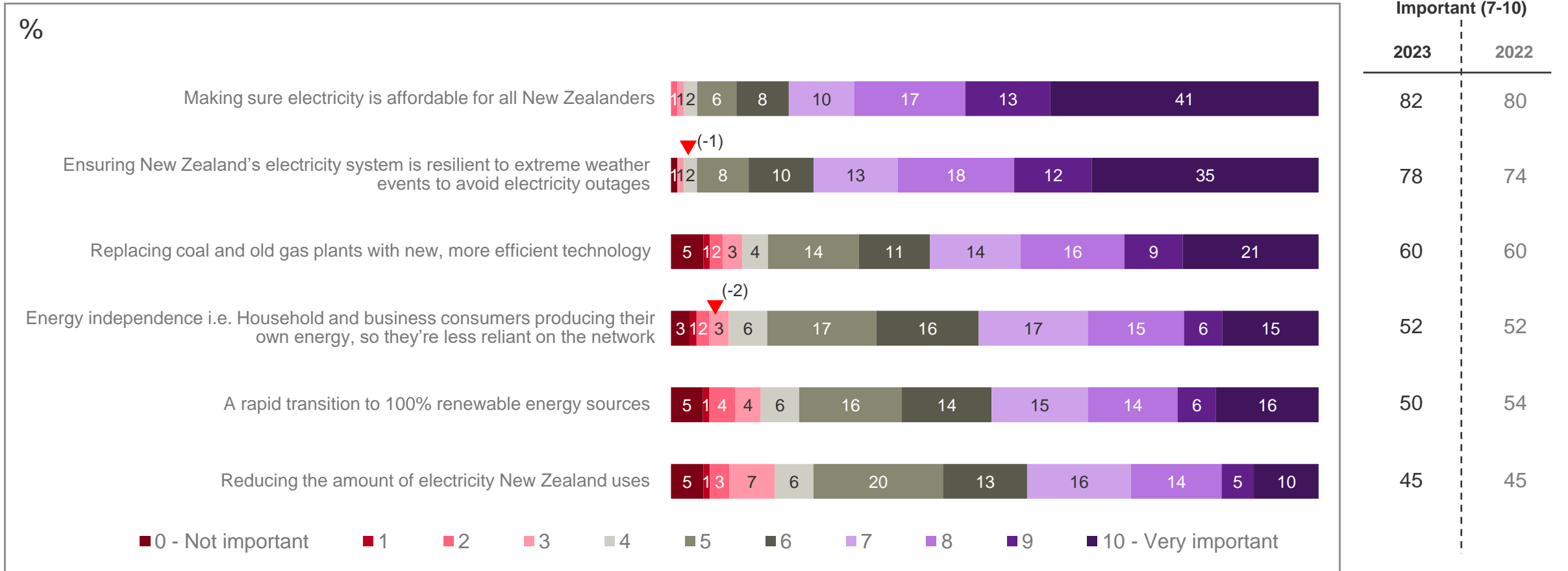
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Attitudes about the
electricity market

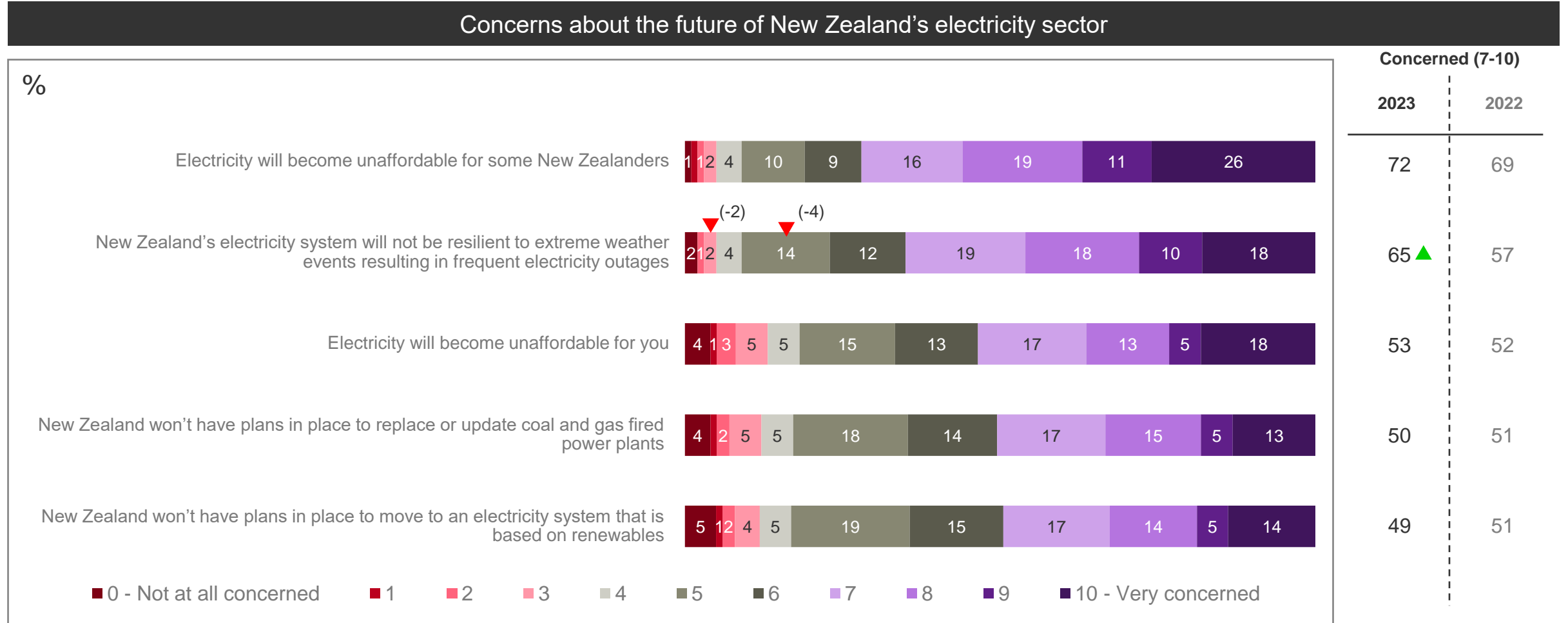


An affordable and resilient electricity system are still the two most important issue for New Zealanders.

Importance of issues for managing the electricity sector in the future



And the proportion of New Zealanders who are concerned the system will not be resilient to extreme weather over the next 10 years has grown by 7pts.



▲▼ Significantly higher/lower than 2022

04

Switching behaviours



Like 2022, the majority (63%) of New Zealanders have been with their current provider for three or more years, and one quarter have been with theirs for more than ten.

Length of time with current provider

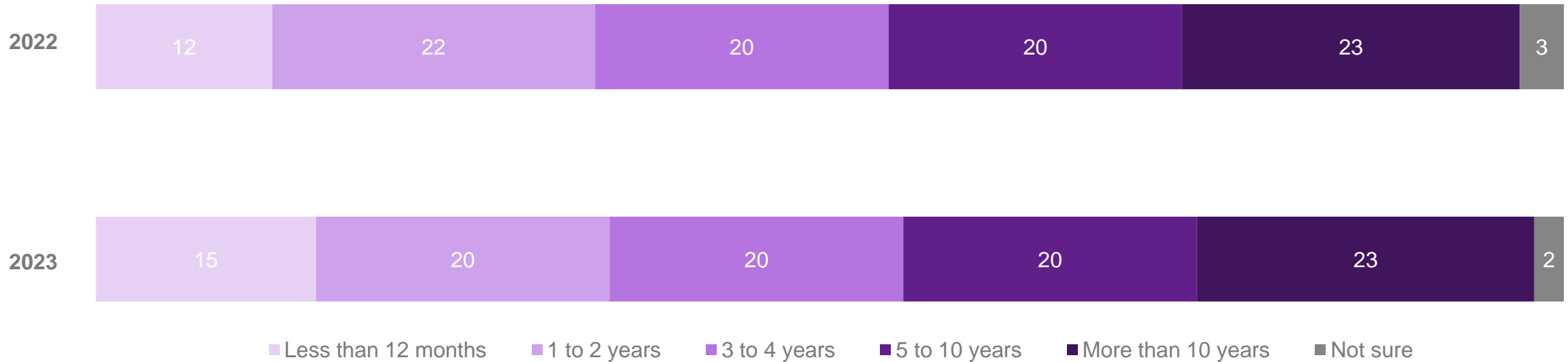
%

Groups more likely than average to have been with provider up to two years (34%):

- Aged 18-39 (56%)
- South Island (40%, vs. 32% North Island)
- Asian New Zealanders (45%)
- Urban area (43%, vs. 30% suburban/rural area)
- Renters (49%, vs. 29% homeowners)

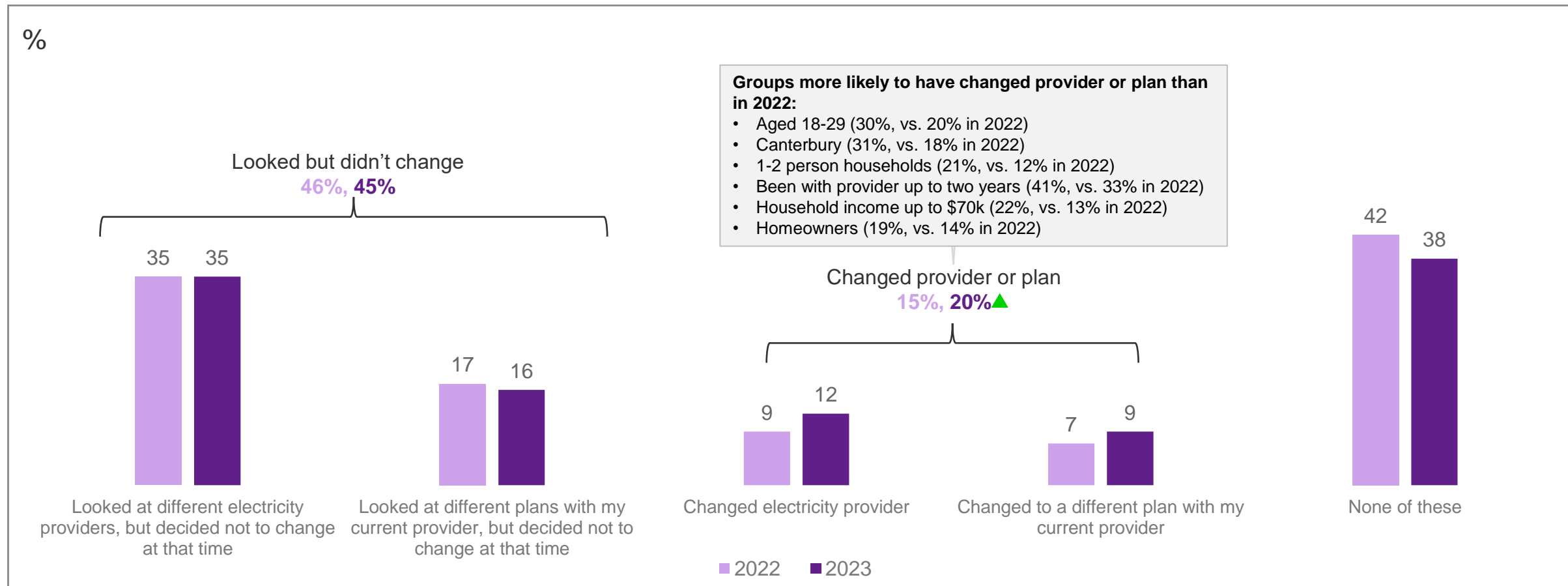
Groups more likely than average (43%) to have been with provider for 5+ years:

- Aged 50+ (64%, vs. 28% aged under 50)
- Māori (51%)
- Pacific peoples (59%)
- Homeowners (50%, vs. 30% renters)

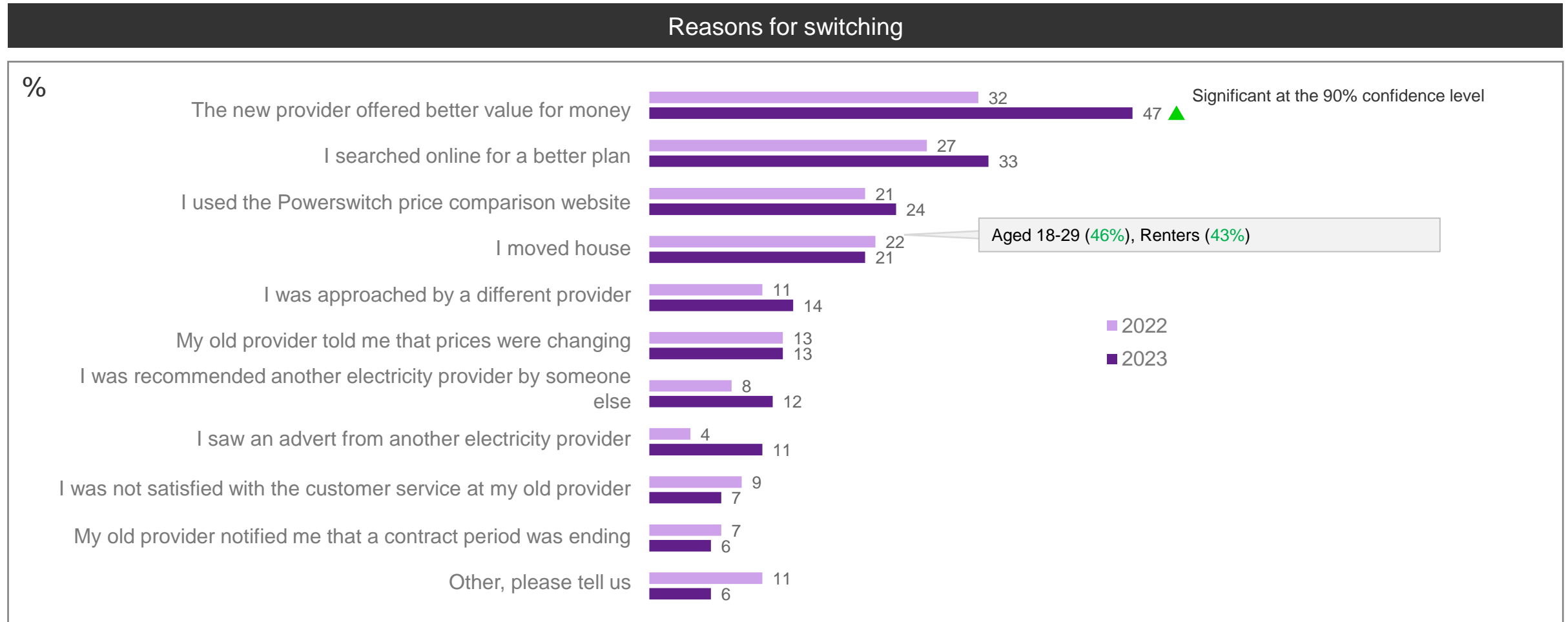


Compared to 2022, more New Zealanders have changed plan or provider in the past 12 months (up 5pts). Younger New Zealanders, those in Canterbury and who have been with their provider less than two years are most likely to have switched plan or provider.

Switching behaviours in the past 12 months



On the previous page we saw in 2023 that 12% of people had switched provider in the last 12 months. Better value for money has increased as a reason for this (at the 90% confidence level) and is now by far the main reason for switching provider. Nearly half young people and renters who switched, did so because they moved house.

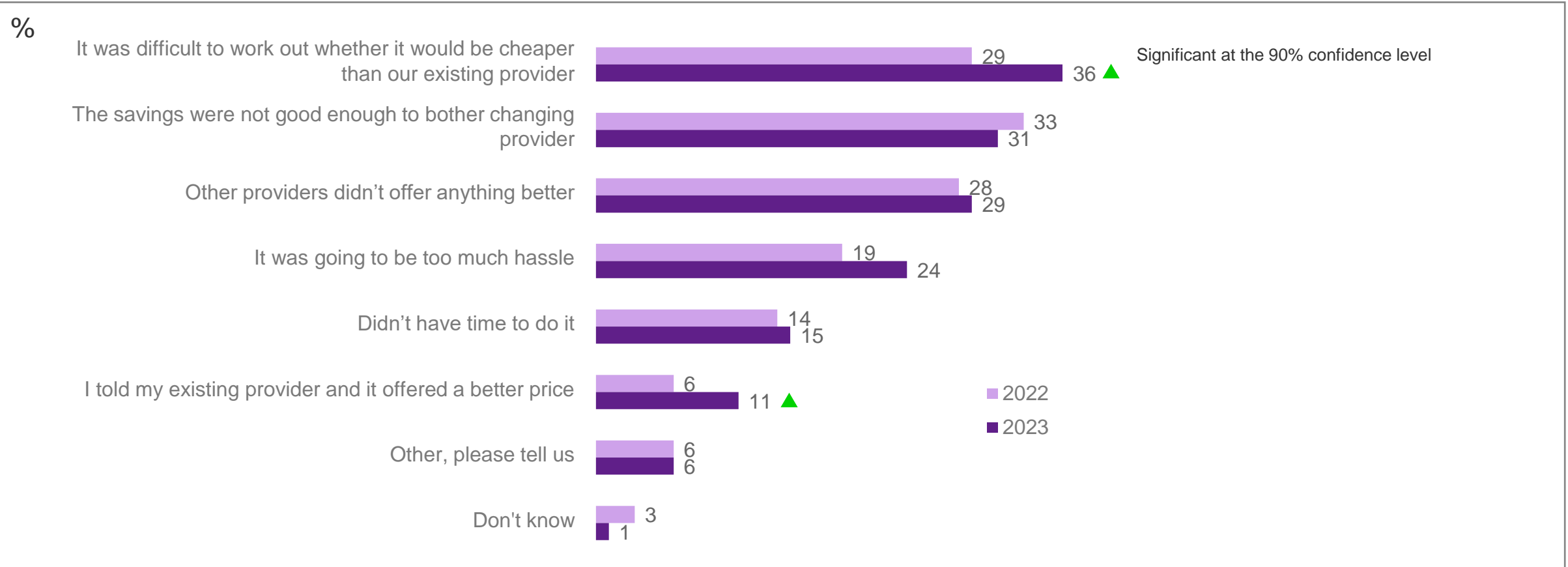


▲ ▼ Significantly higher/lower than 2022

xx% / xx% Significantly higher / lower than Total

For the 35% of people who chose not to switch providers, difficulty working out if it would be cheaper is now the key reason (up 7pts since 2022, and significant at 90% confidence level). One in ten New Zealanders who chose not to switch did so because their existing provider offered a better price (up 5pts).

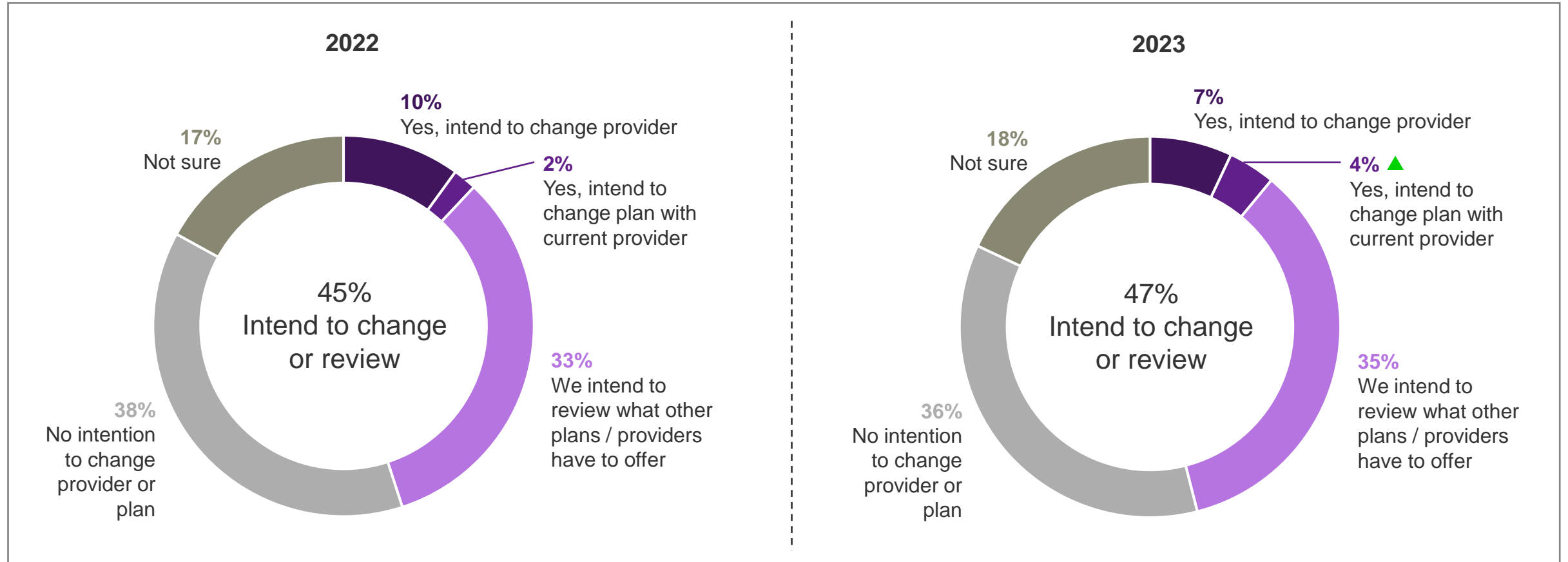
Reasons for deciding not to switch



▲ ▼ Significantly higher/lower than 2022

Like 2022, nearly half of New Zealanders intend to change or review their plan/ provider, although this year slightly more intend to change their plan with their current provider.

Switching intentions over the next 12 months

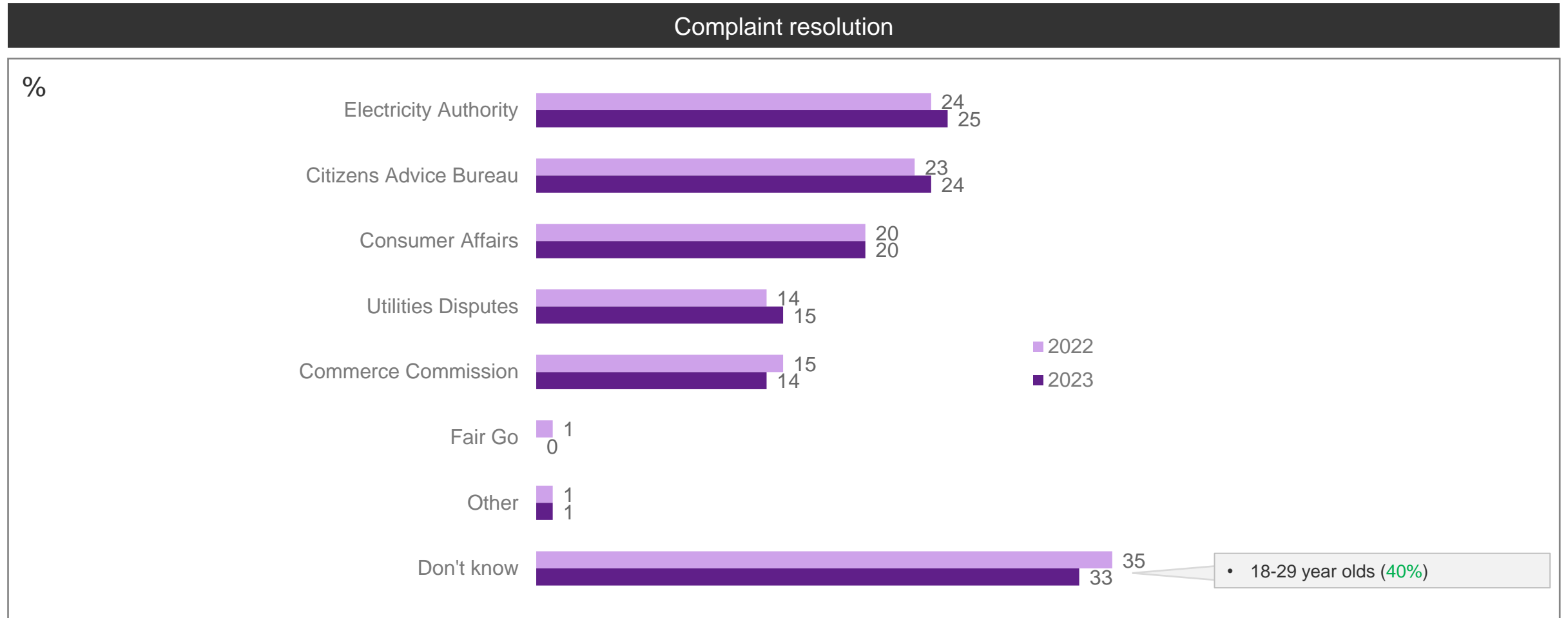


05

Knowledge about and
confidence in the
electricity market



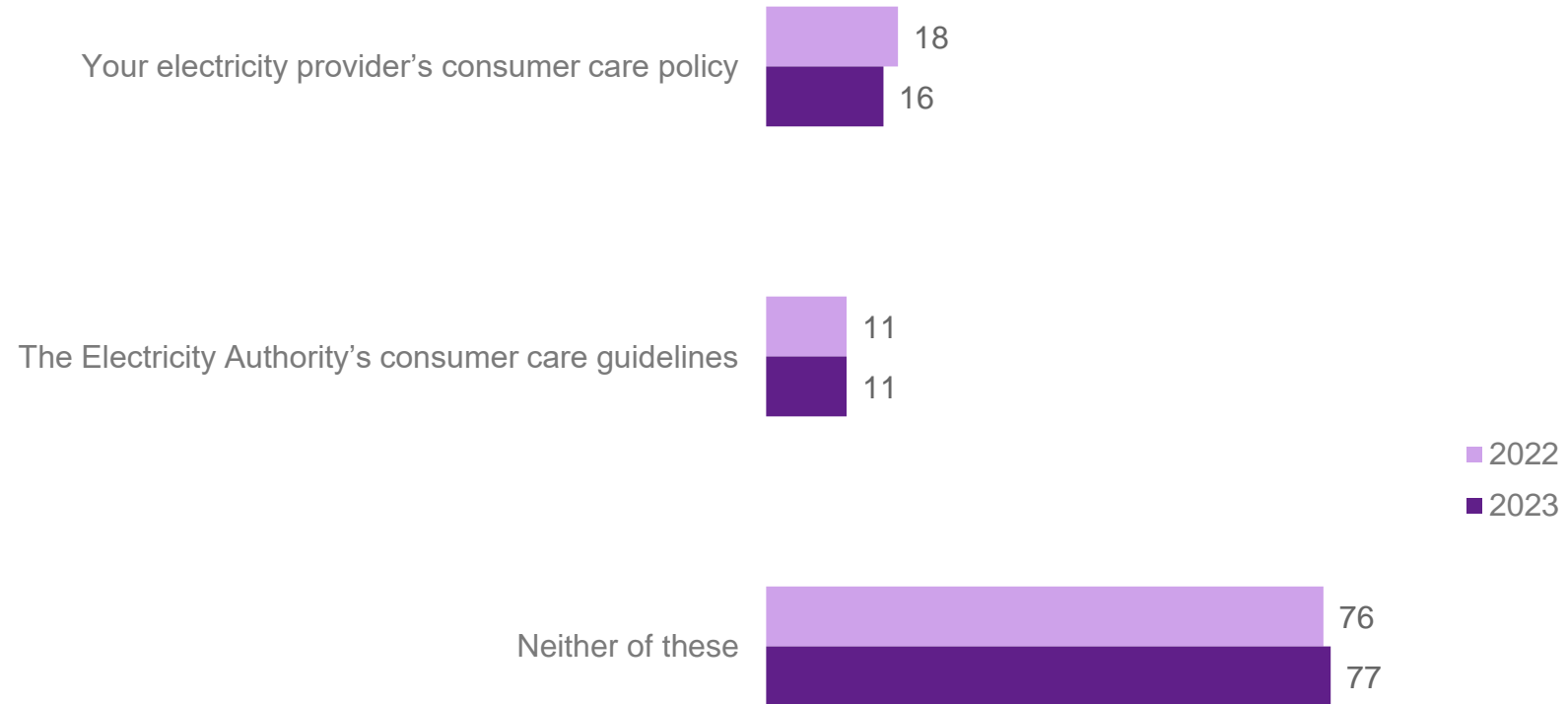
Compared to 2022, there has been no change in where New Zealanders would go for help if they couldn't resolve a complaint with their electricity provider.



Similarly, awareness of consumer care policies and guidelines has not increased since 2022.

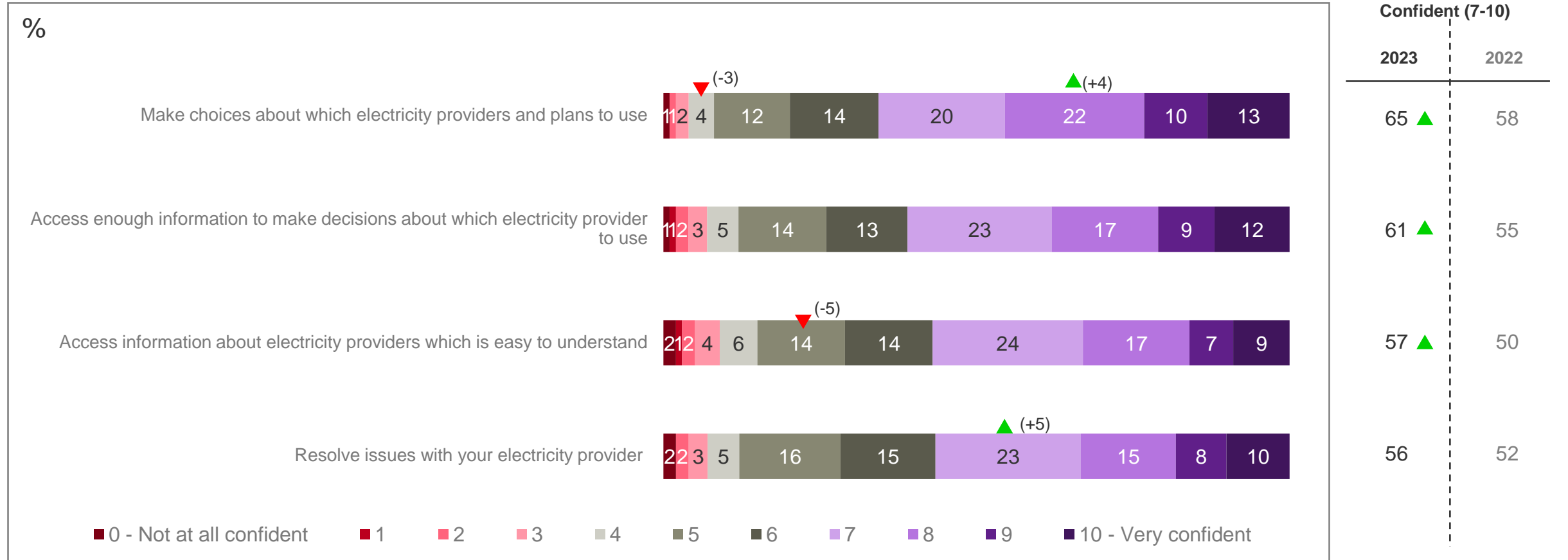
Awareness of consumer care policy and guidelines

%



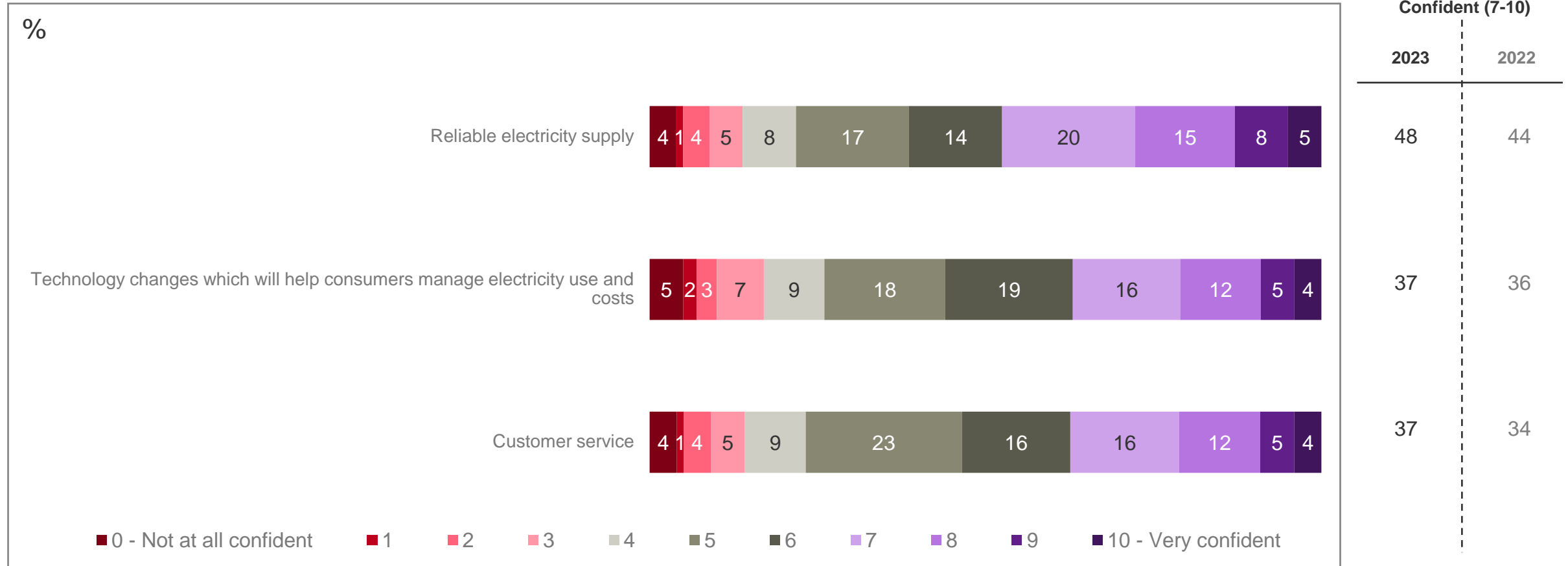
This year, there is a greater sense of agency about making informed decisions about electricity provision and accessing easily understood information.

Making choices and accessing information

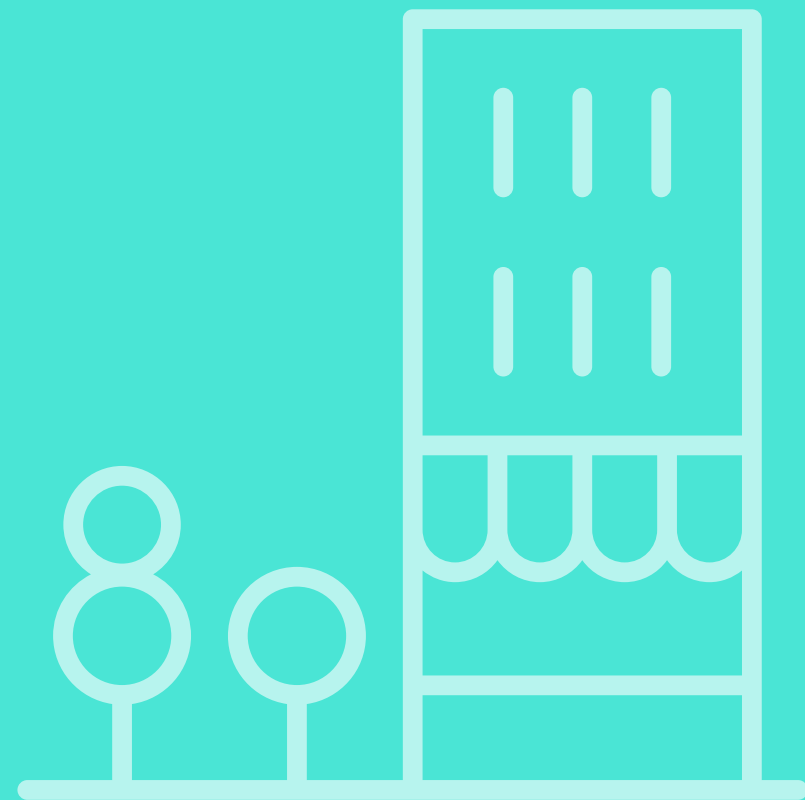


Half of New Zealanders are confident the electricity market will provide a more reliable supply over the next five years.

Confidence the electricity market will provide better outcomes in the next five years for...



Small business results



Experiences with electricity provider

Overall satisfaction with electricity providers remains the same.



Trust in electricity providers to do the right thing is unchanged.

2022 46%

2023 48%



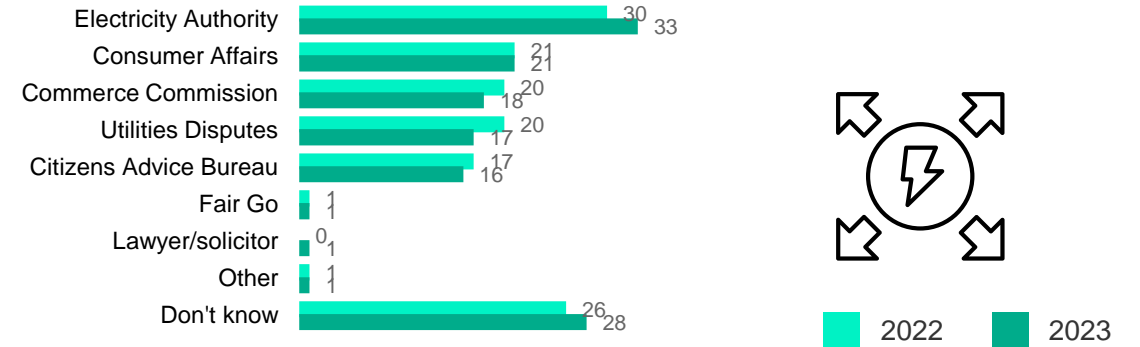
Value for money perceptions are also unchanged.

2022 55%

2023 57%

Knowledge about and confidence in the market

Like 2022, the majority of small businesses feel they would know who to contact if they had a complaint that couldn't be resolved with their electricity provider.

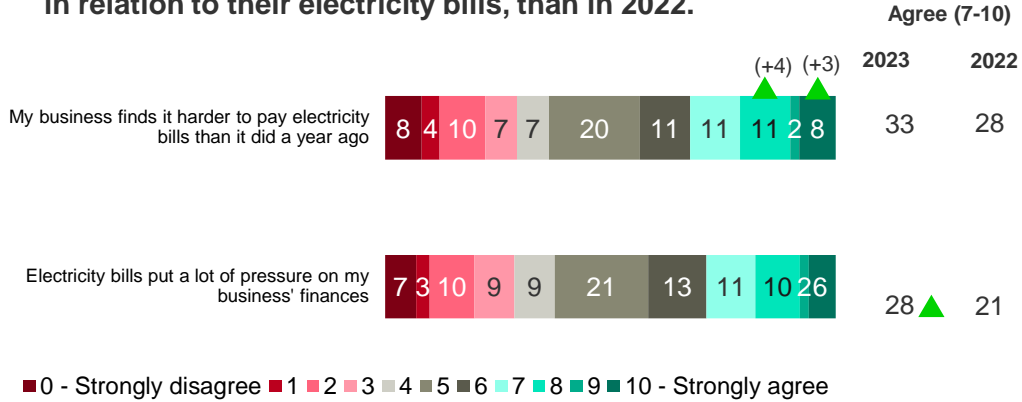


And confidence in making decisions about providers and accessing enough and easily understood information is stable.

	Confident (7-10)	
	2022	2023
Make choices about which electricity providers and plans to use	62	65
Access enough information to make decisions about which electricity provider to use	60	59
Resolve issues with your electricity provider	55	55
Access information about electricity providers which is easy to understand	52	52

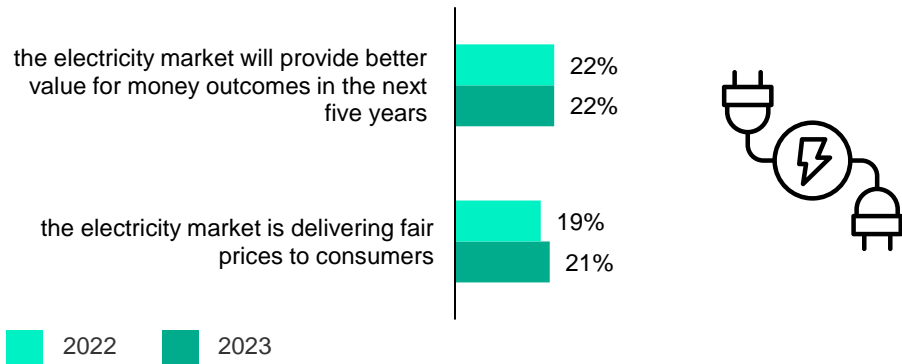
Affordability

More New Zealand businesses are experiencing financial pressure in relation to their electricity bills, than in 2022.



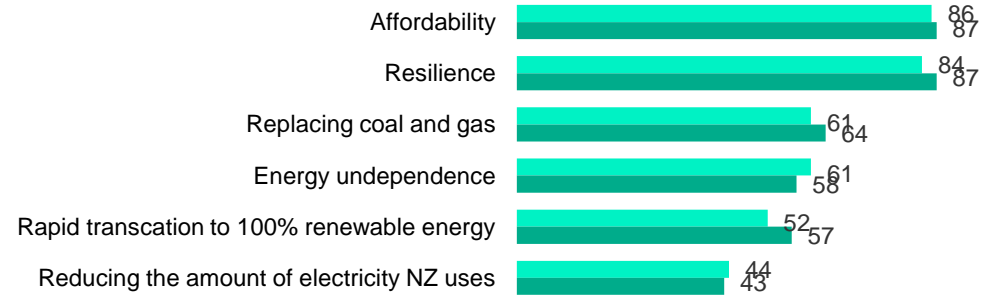
And small businesses have low confidence that the electricity market is delivering fair prices, or that this will improve in the next five years.

% who are confident ...



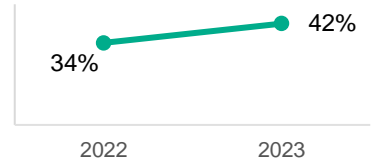
Attitudes towards the electricity sector

Affordability and a resilient system remain the two most important issues for small businesses.



And in 2023, more small businesses think it is *very important* that New Zealand's electricity system is resilient to extreme weather events

% who think a system resilient to extreme weather events is important



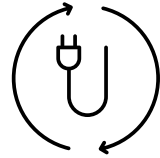
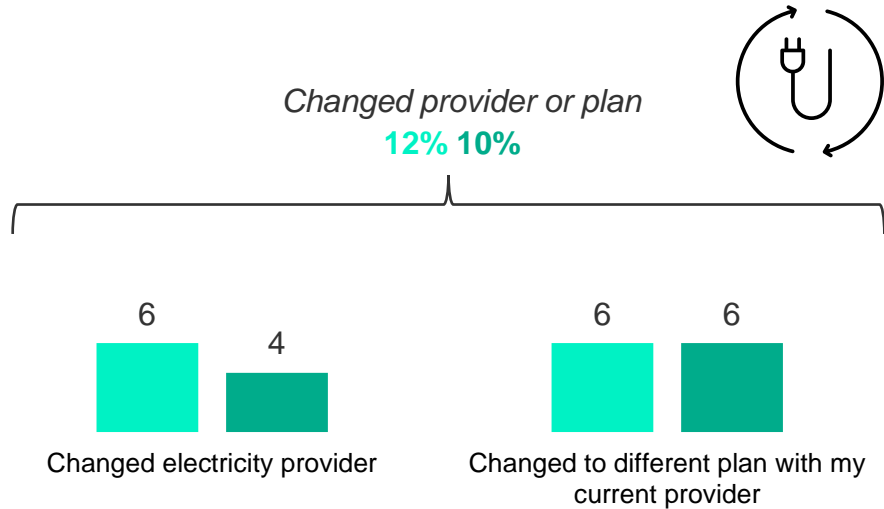
And in 2023, the greatest concern among small businesses is that New Zealand's electricity sector will not be resilient to extreme weather over the next 10 years.

% concerned about the future of New Zealand's electricity sector...

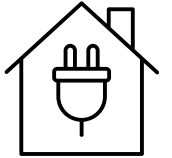
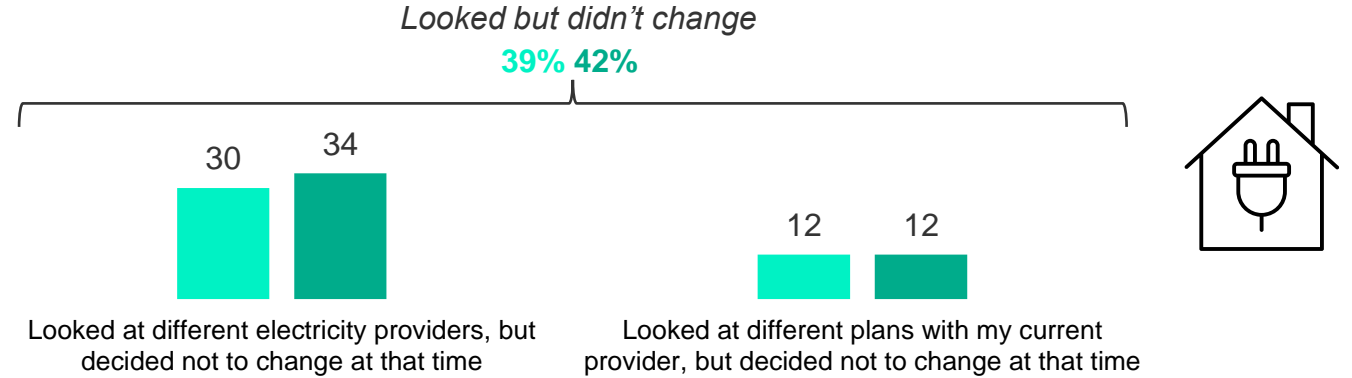
	2022	2023
New Zealand's electricity system will not be resilient to extreme weather events resulting in frequent electricity outages	59	68 ▲
Electricity will become unaffordable for some New Zealand businesses	57	62
New Zealand won't have plans in place to replace or update coal and gas fired power plants	53	55
New Zealand won't have plans in place to move to an electricity system that is based on renewables	52	53
Electricity will become unaffordable for you	39	41

Switching behaviour

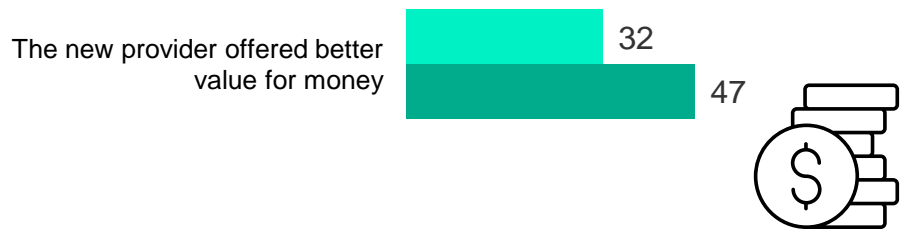
Similar to 2022, one in ten small businesses have changed plan or provider in the past 12 months



Like 2022, about four in ten small businesses looked at different providers / plans in the last 12 months but decided not to switch.



And like 2022, the main reason for switching is because the new provider offered better value for money.



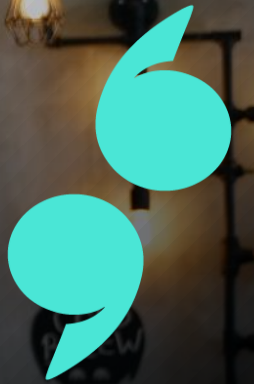
Similar to 2022, key reasons for switching are around the perception they wouldn't be better off by doing so. This year more small businesses didn't switch because they thought it would be a hassle.



▲ ▼ Significantly higher/lower than 2022

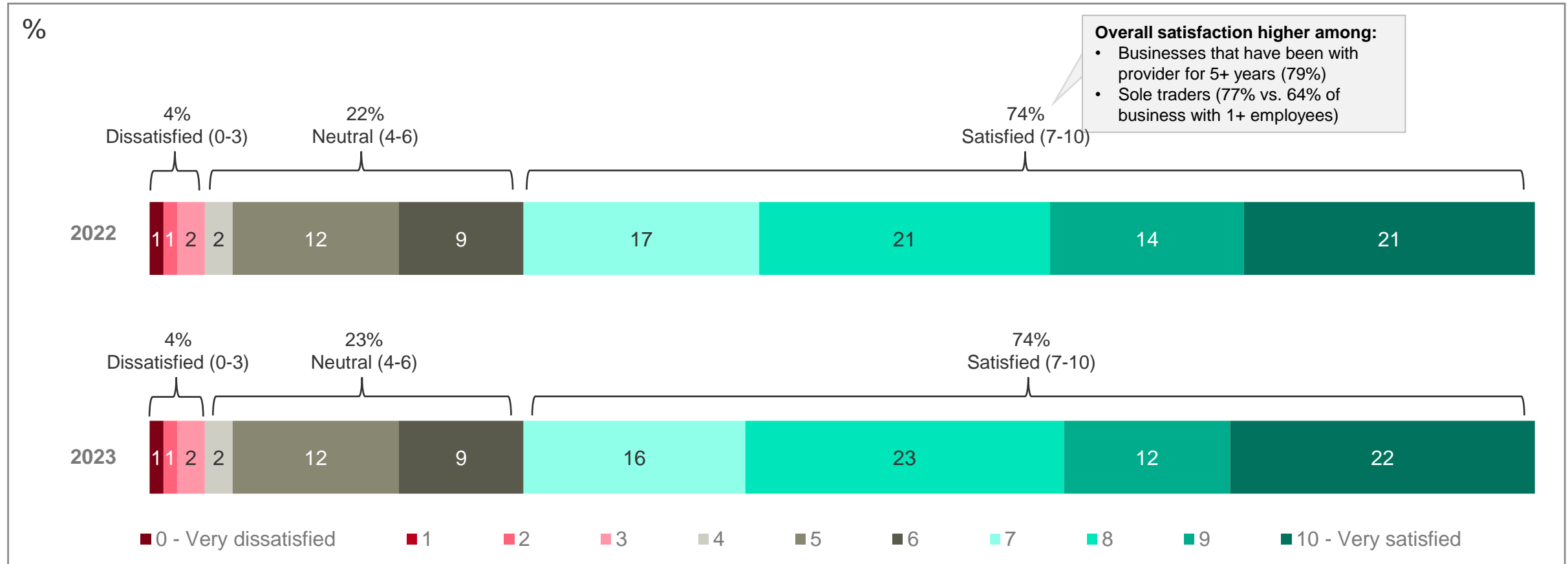
01

Small business' experiences in the electricity market



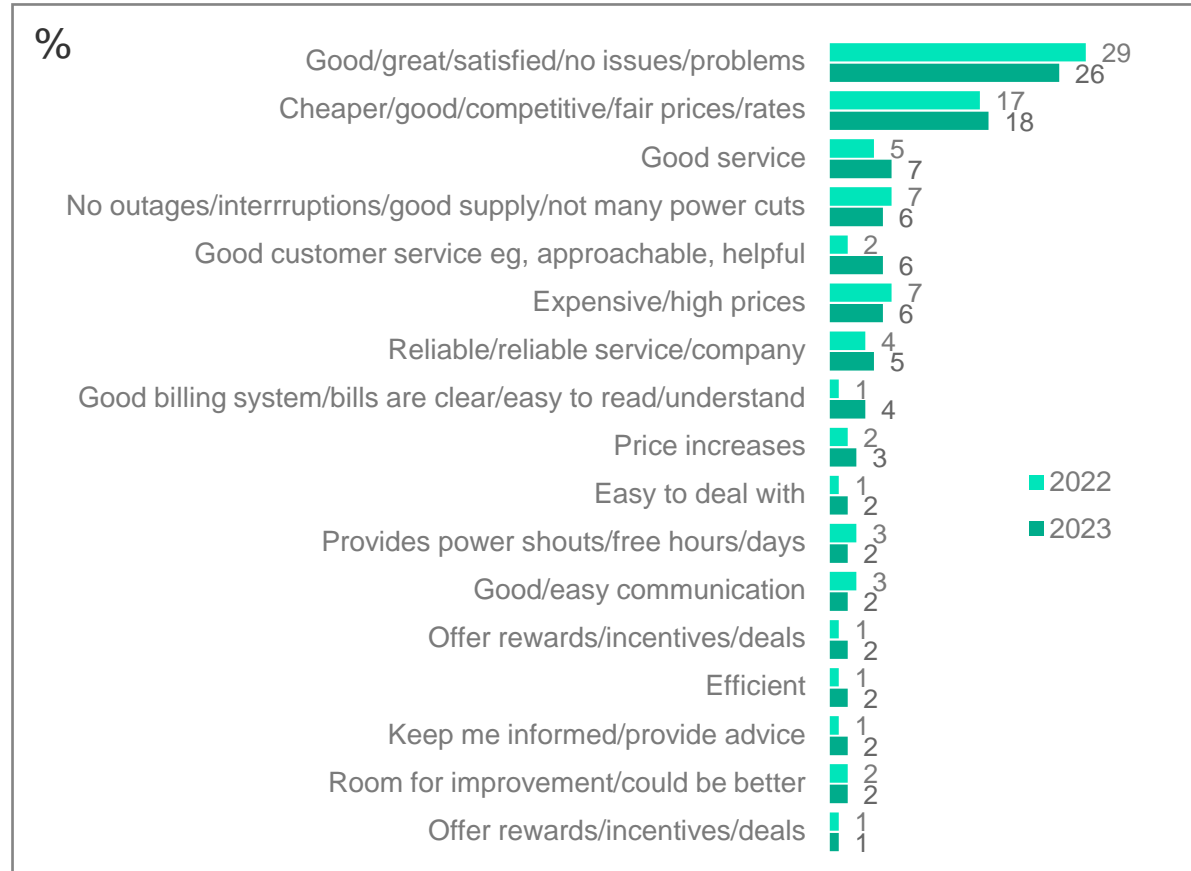
Like 2022, most small businesses are satisfied with the service they receive from their current provider. Sole traders and businesses that have been with their provider more than four years have higher than average satisfaction.

Level of satisfaction with current provider



Consistent with 2022, for the 74% of businesses that are satisfied with their provider, just tending to be happy because they've had no issues and fair prices are the most common reasons.

Reasons for being satisfied with current provider (coded responses)



“

I have had no issues aside from the increasing cost of electricity.

Easy to deal with. Reasonable pricing.

I No interruption to power, easy to access via app or online.

Have been with them for years and have had no problems at all..

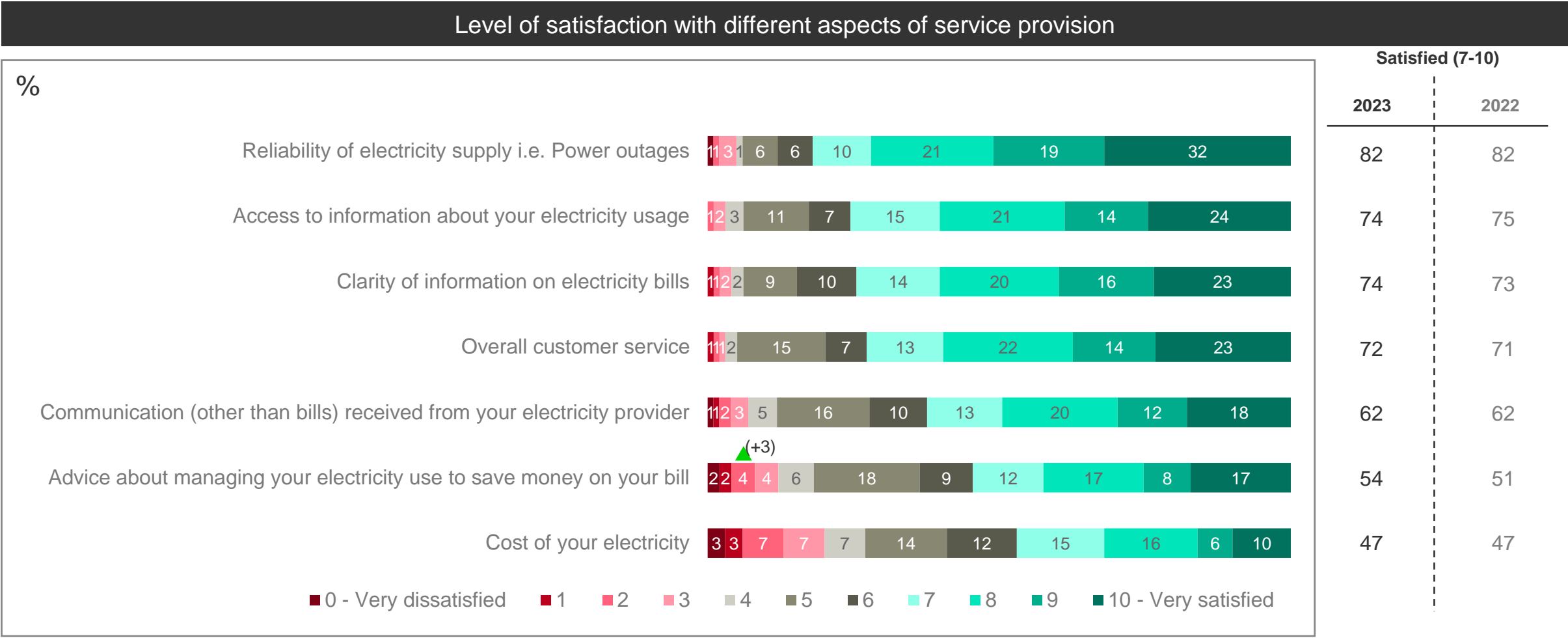
Efficient billing system, reasonably easy to contact.

I Average price. Very good customer contact service. Halved what they pay us for the power we produce 4 years ago..

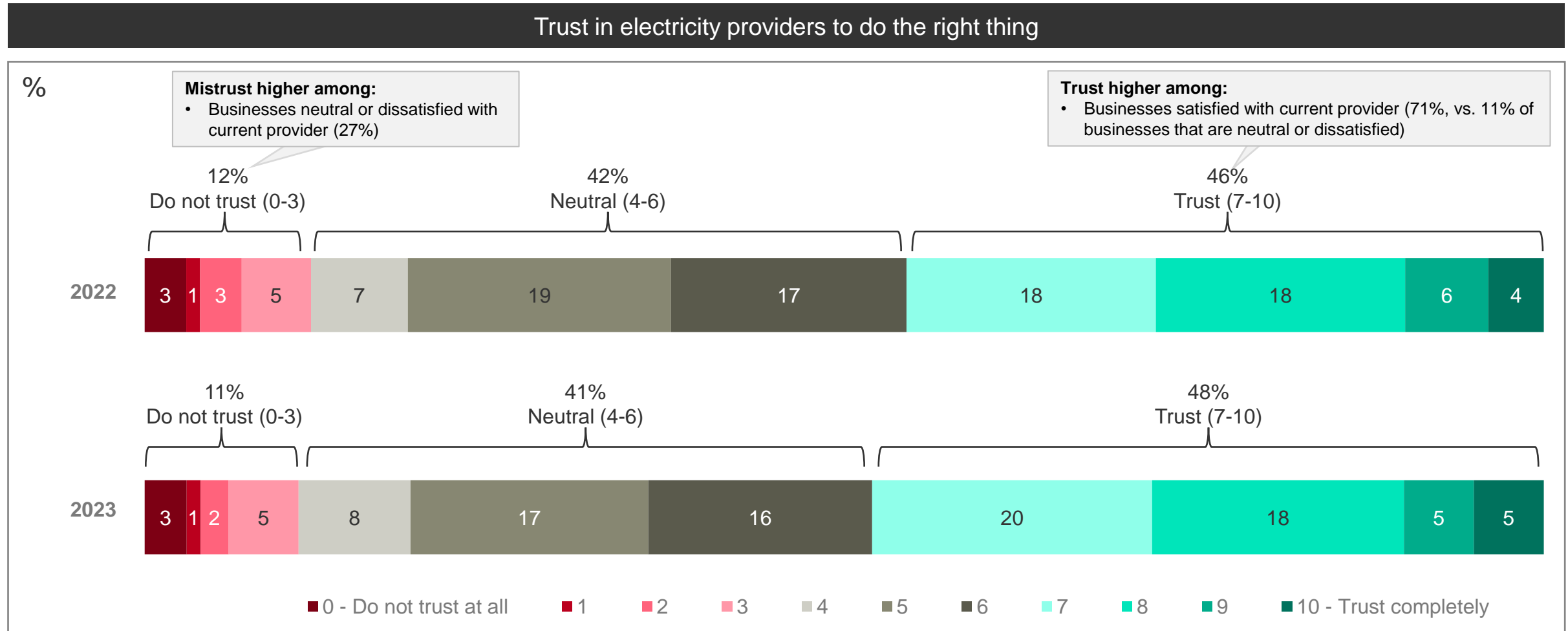
I choose power companies that I know will give me good service..

Good communication and good power rates.

NZ small businesses continue to be most satisfied with the reliability of their electricity supply, usage information, clarity of information, overall customer service and comms received from their provider. Likewise, satisfaction continues to be lowest for cost related aspects including advice on saving money on bills and the cost of electricity itself.

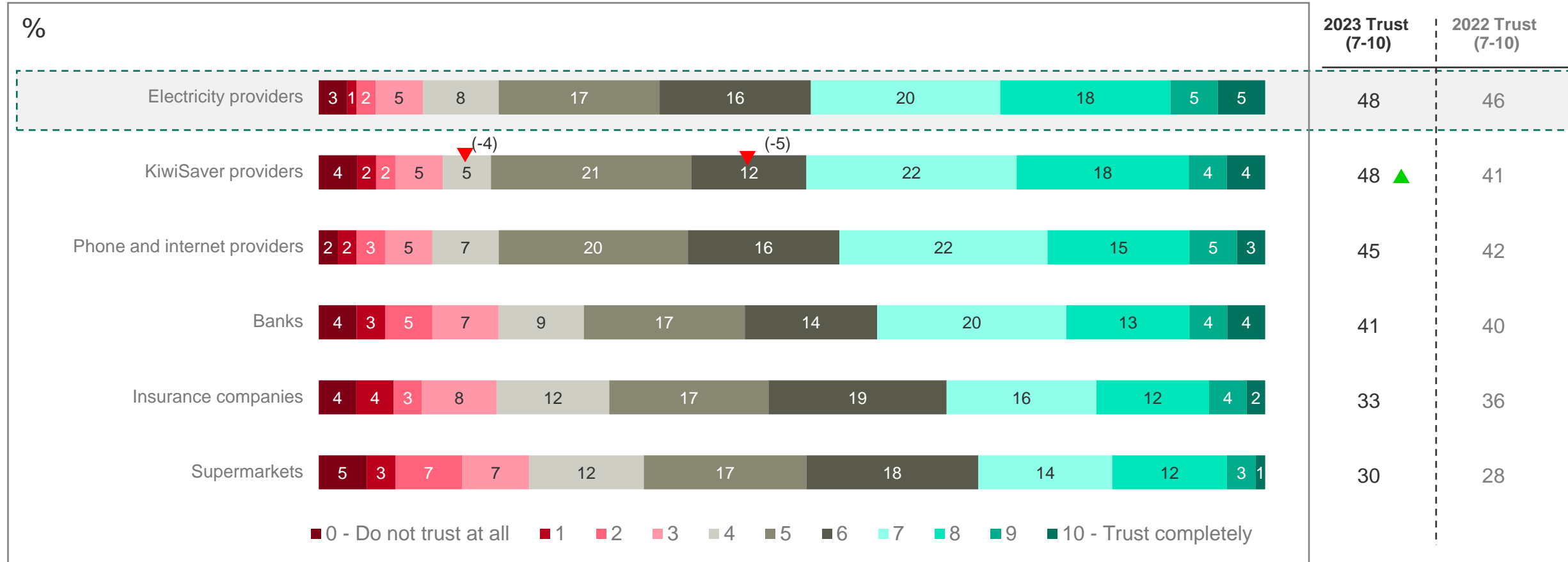


Similarly, the trust small businesses have in electricity providers to do the right thing is on par with 2022; nearly half of NZ small businesses trust electricity providers to do the right thing by their customers.



An increase in trust of Kiwisaver providers bring them on par with electricity providers in terms of how much NZ small businesses trust them to do the right thing by their customers. Insurance companies and supermarkets continue to garner the lowest amounts of trust.

Trust to do the right thing – sector comparison



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02

Affordability



Like 2022, NZ small businesses pay for a range of services / products alongside electricity.

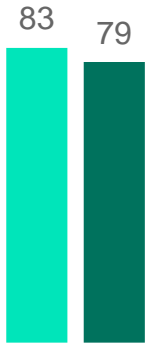
Services / products used

%

1+ employees (93%, vs. 79% sole traders)

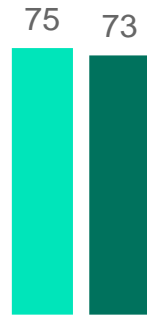


A bank account



Broadband internet

1+ employees (84% vs. 70% sole traders)



Mobile phone plan

1+ employees (79% vs. 60% sole traders)



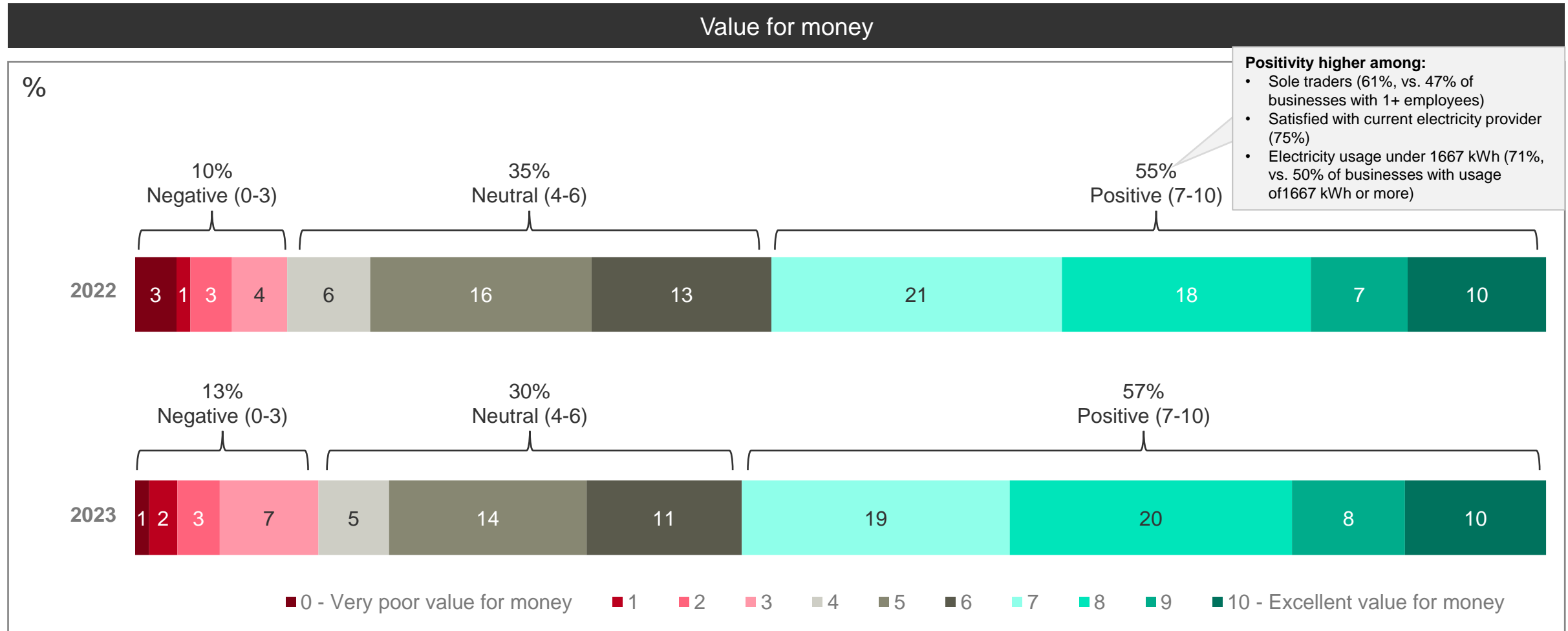
Insurance e.g. contents, car etc.



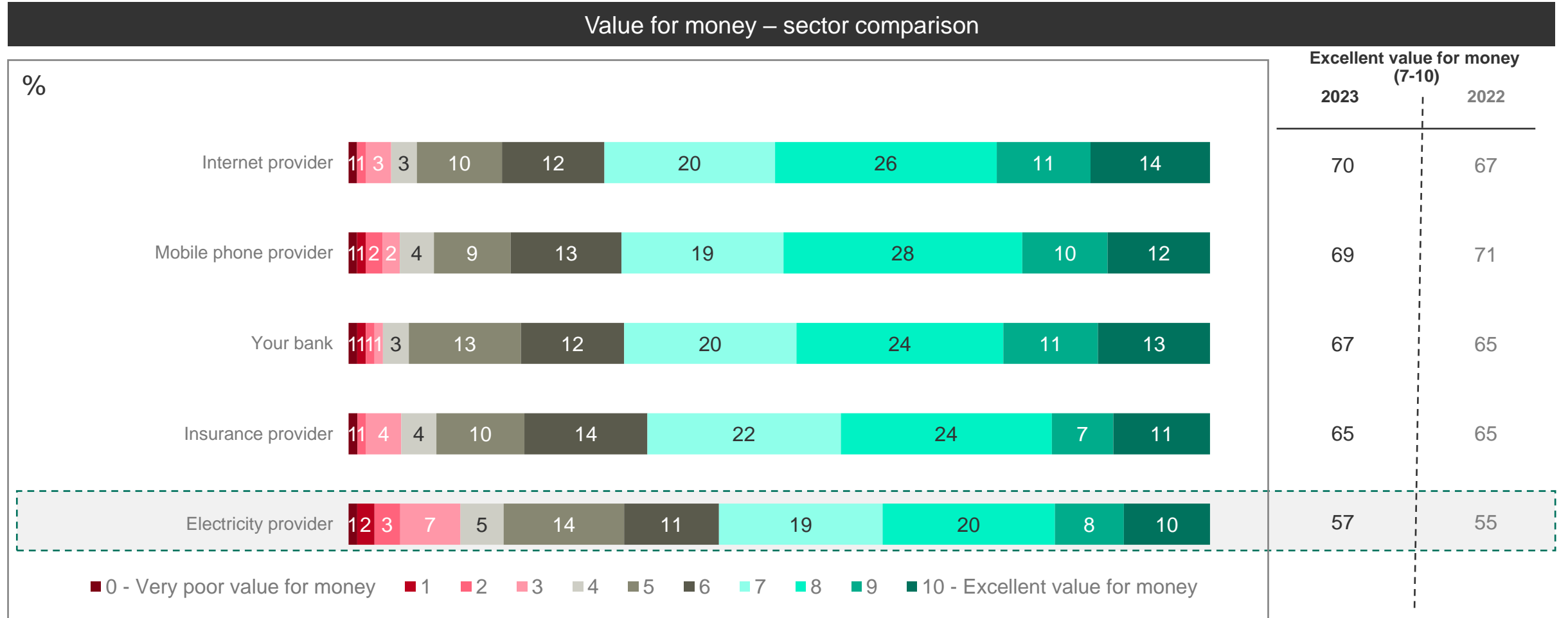
None of these

■ 2022 ■ 2023

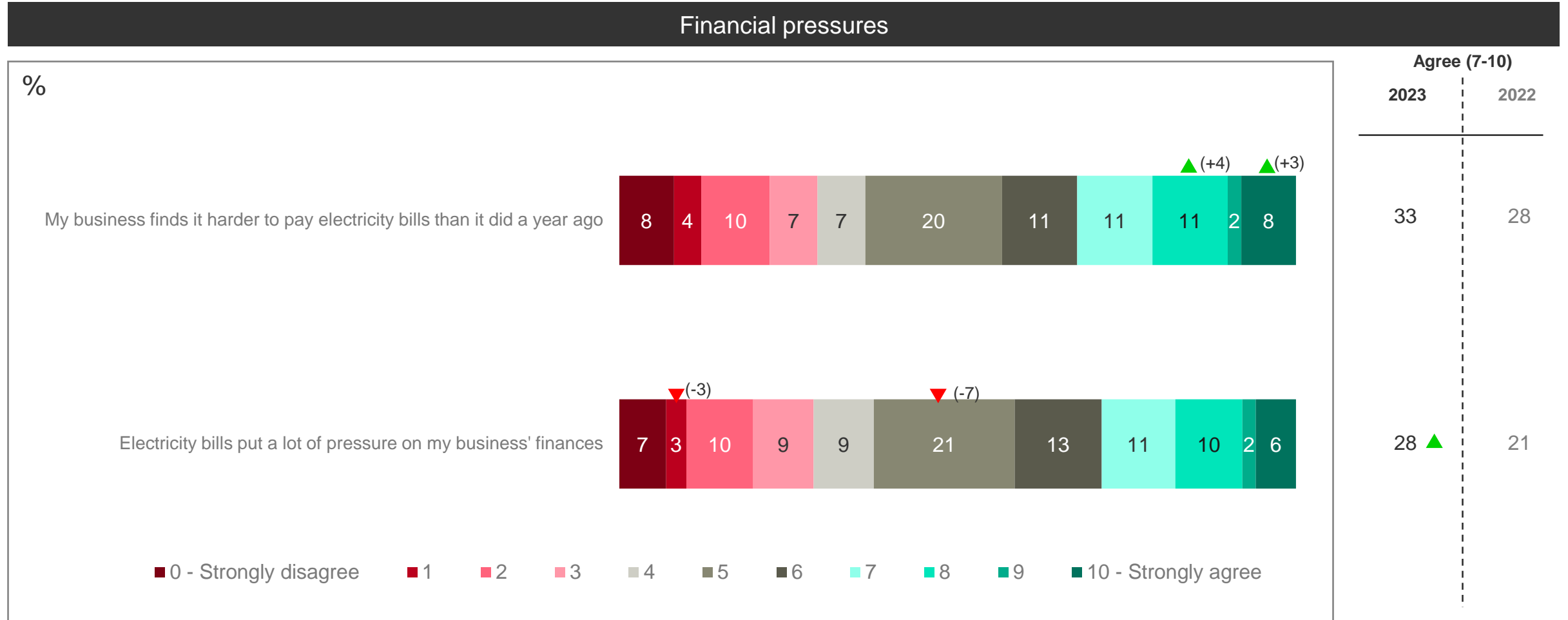
Perceptions of value for money are relatively stable. The 'neutral' group has shrunk slightly with a slight increase in both negative and positive perceptions; however, these changes are not statistically significant.



Like 2022, small NZ businesses have weaker value for money perceptions of electricity providers than any other types of provider (of the providers included in the survey).

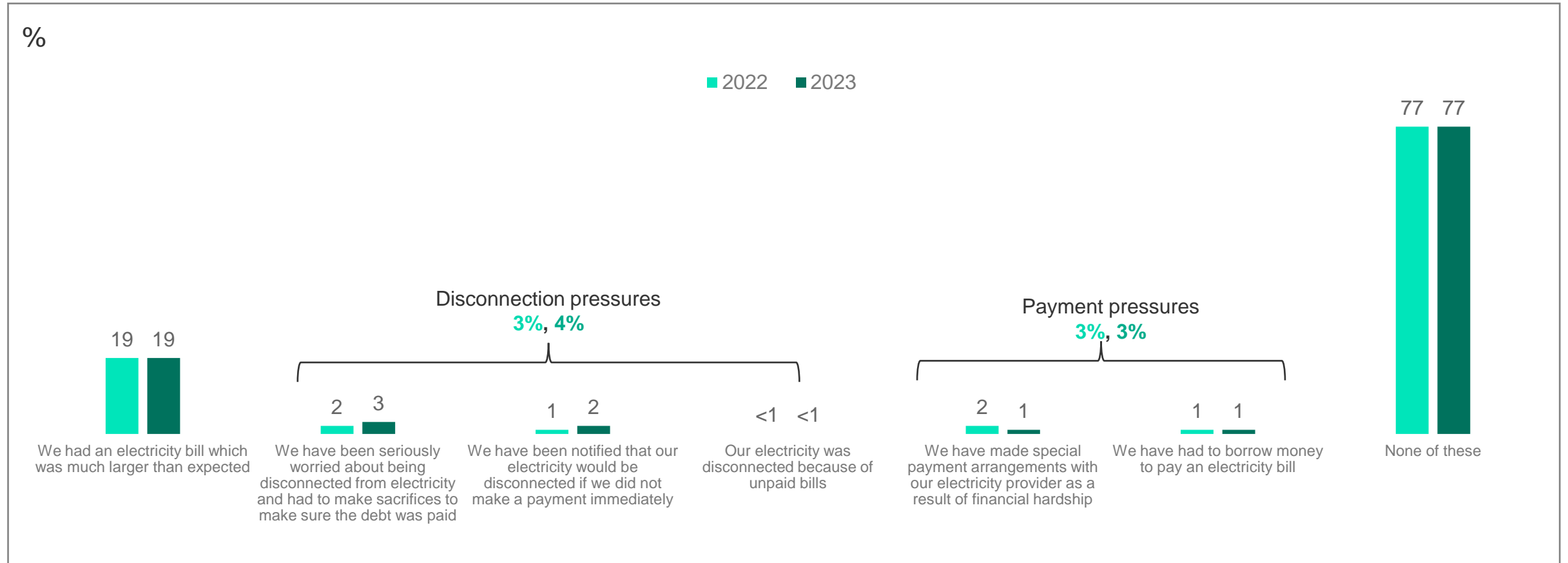


Compared to 2022, small NZ businesses are more likely to agree electricity bills put a lot of pressure on their businesses' finances (up 7pts since 2022). Similarly, there is stronger agreement among small businesses that they find it harder to pay bills than they did a year ago.



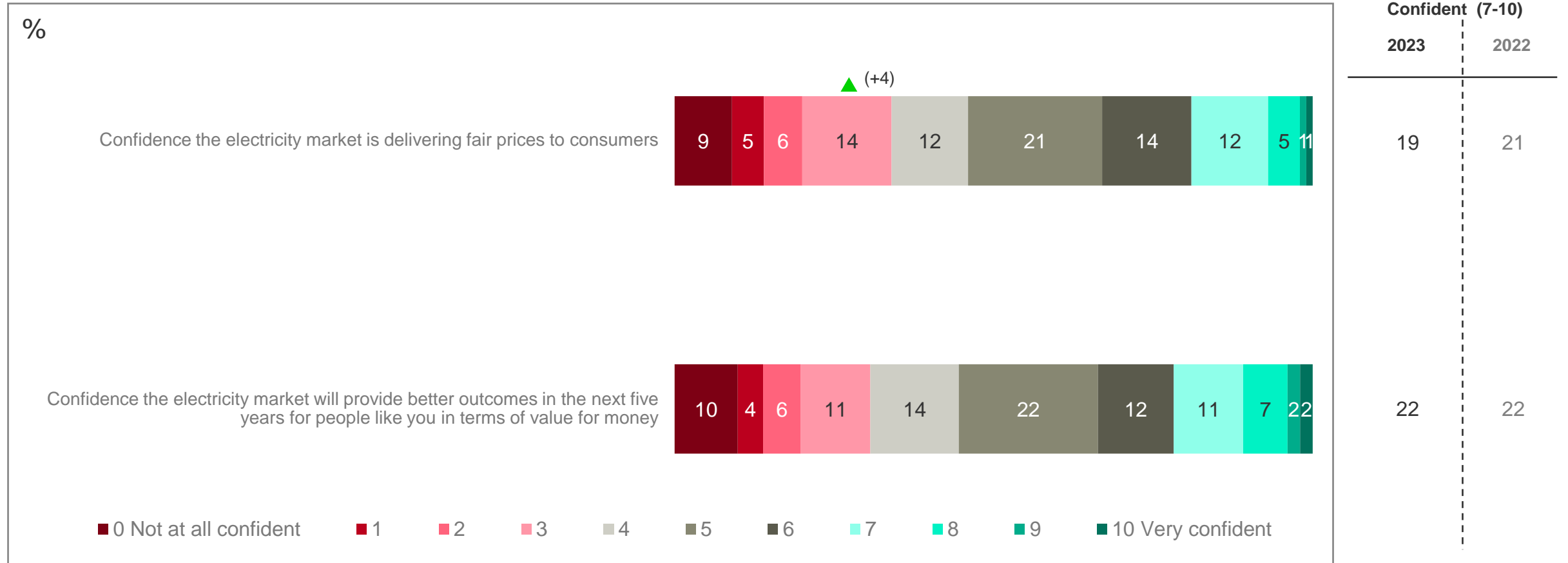
Like 2022, one in five small NZ businesses have received an unexpectedly large electricity bill in the past 12 months, and a small minority have experienced payment or disconnection pressures.

Pressures experienced in the past 12 months



Similar to 2022, small NZ businesses have low confidence that the electricity market is delivering fair prices to customers or will do better in that regard over the next five years.

Confidence in the electricity market delivering fair prices to consumers



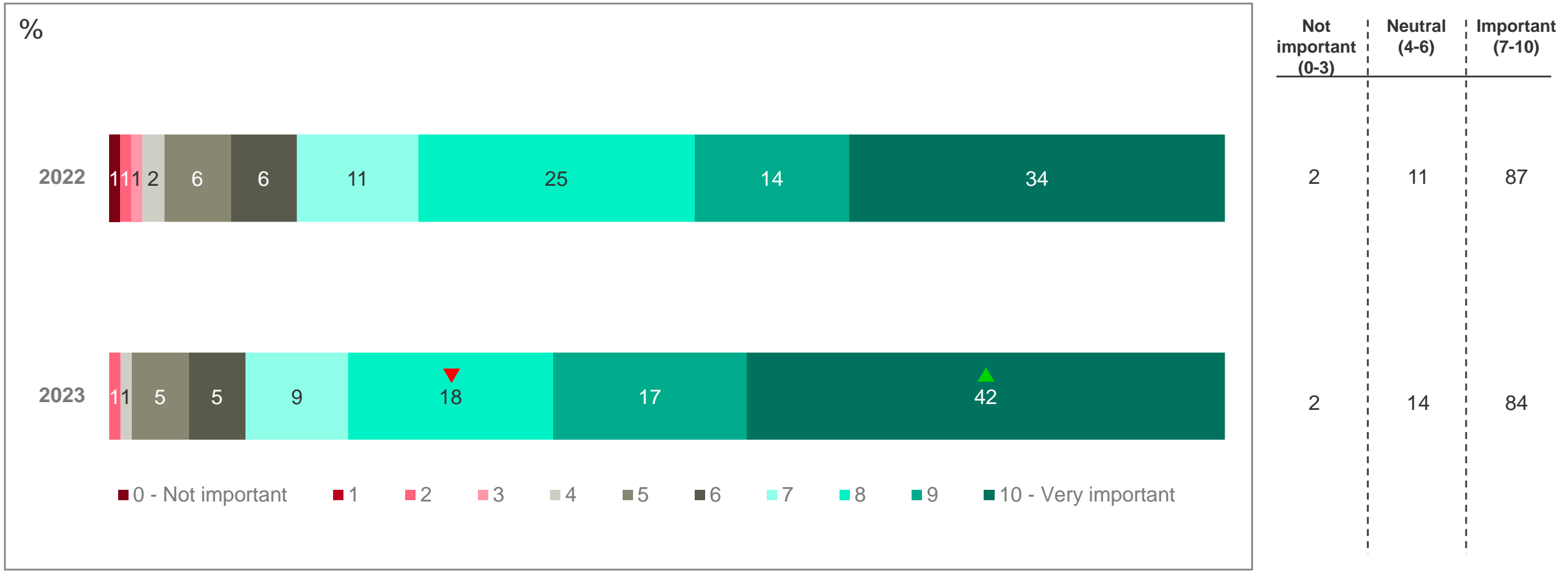
03

Attitudes about the
electricity market



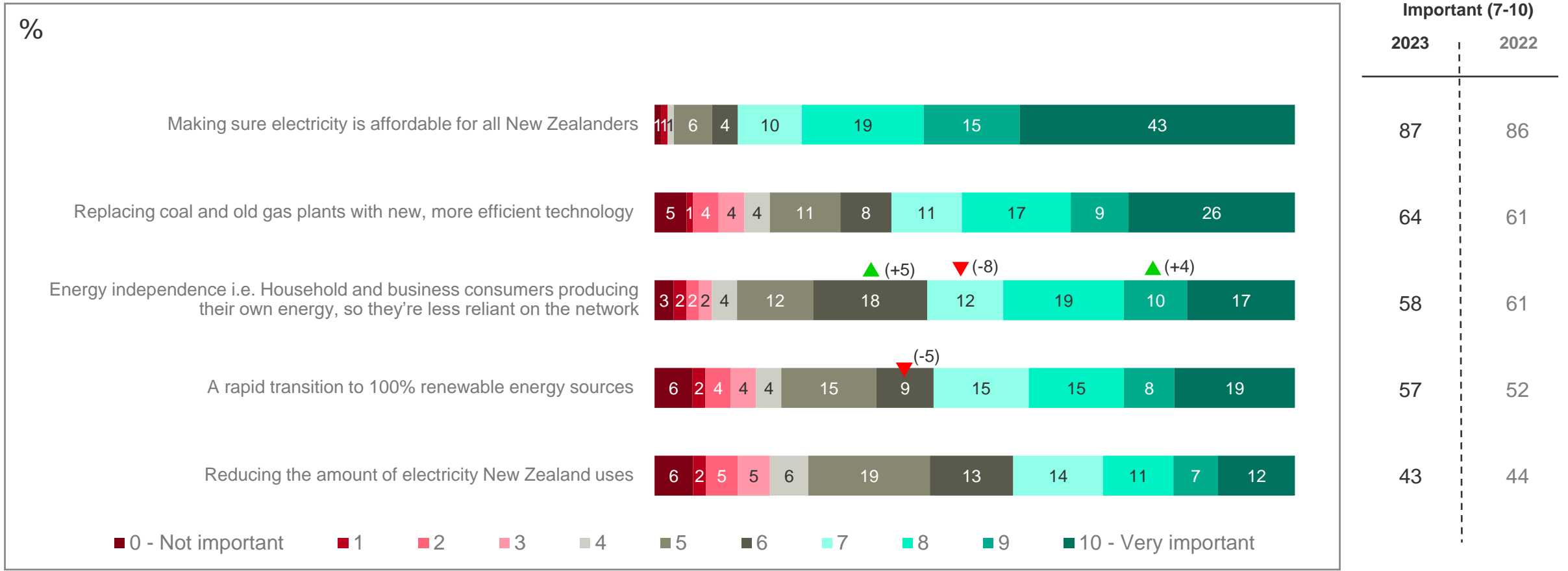
A resilient electricity system is important to NZ small businesses. In fact, compared to 2022, more think it is *very important* that the electricity sector ensures the system is resilient to extreme weather events (up 8pts since 2022).

Importance of ensuring a system resilient to extreme weather events



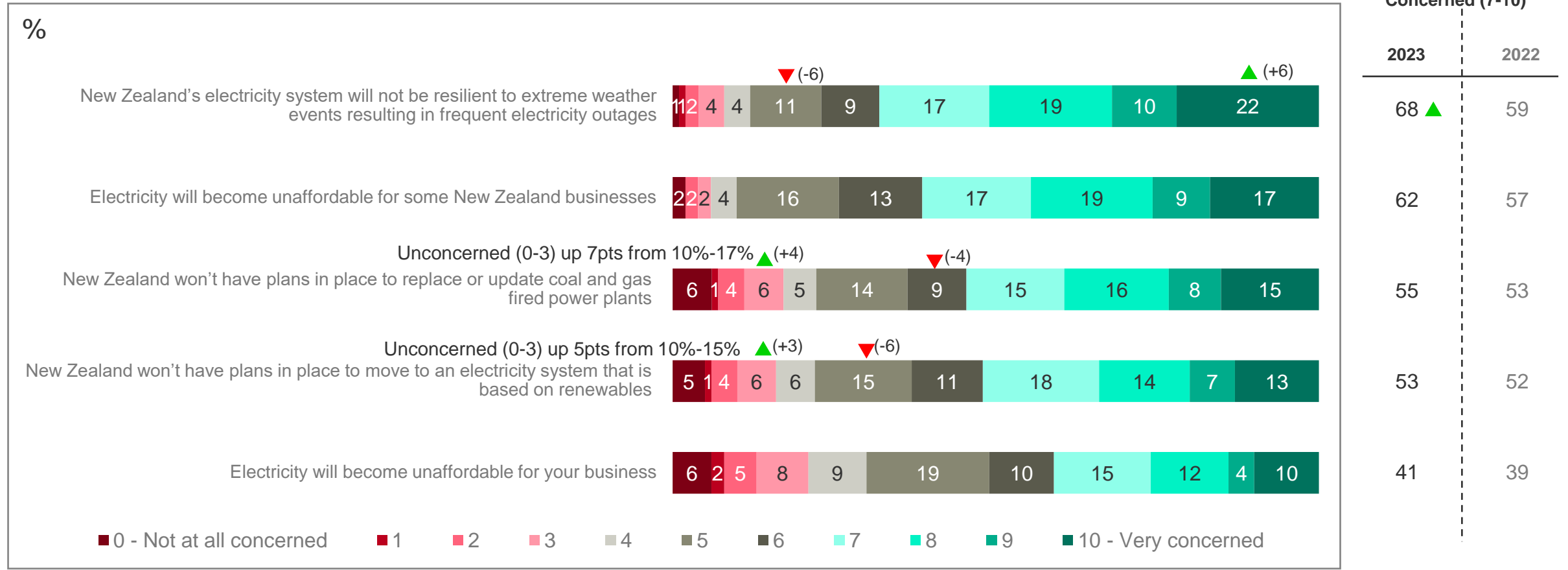
An affordable electricity system continues to be important to small businesses, on par with having a resilient system (see previous page).

Importance of issues for managing the electricity sector in the future



Compared to 2022, more small businesses are concerned about New Zealand’s electricity system not being resilient to extreme weather over the next ten years; in fact, one in five are *very concerned* (up 6pts since 2022). Slightly more are unconcerned about New Zealand’s sustainable energy plans, although this is a result of fewer businesses feeling more neutral as the size of the concerned group is largely unchanged.

Concerns about the future of New Zealand’s electricity sector



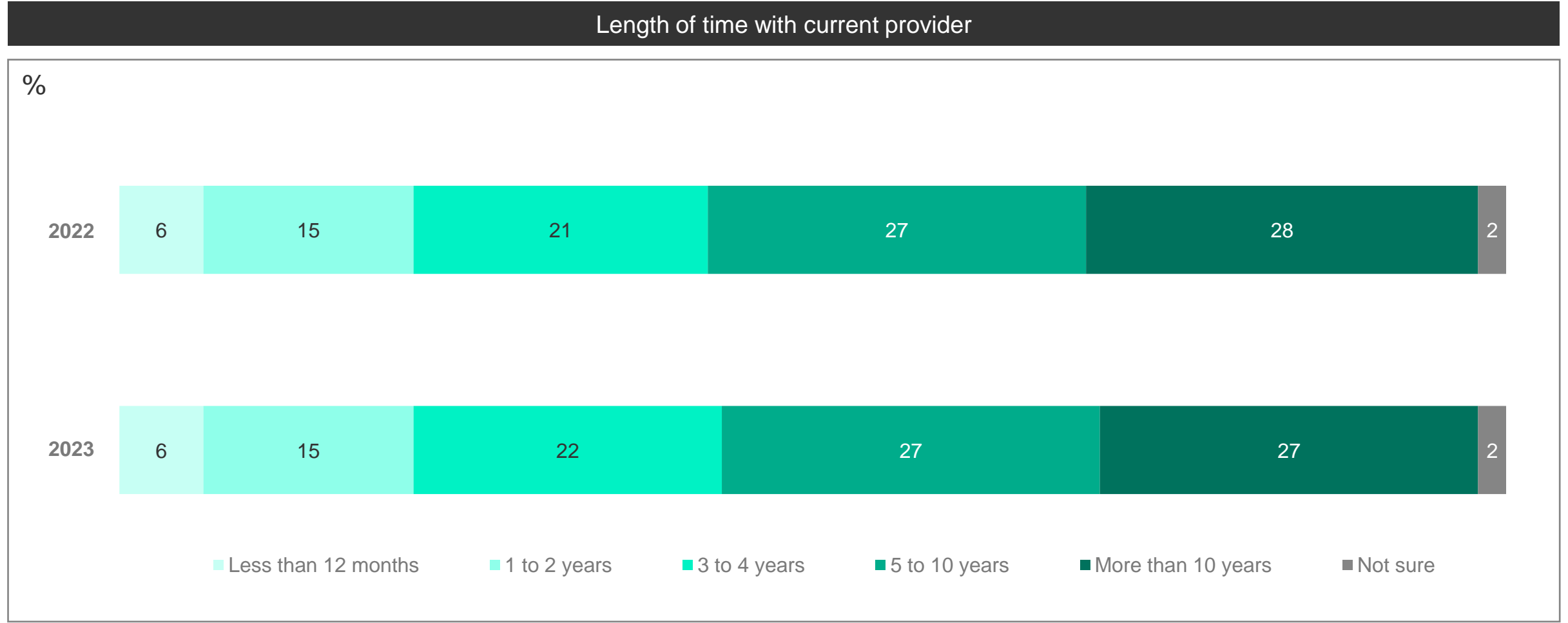
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04

Switching behaviours

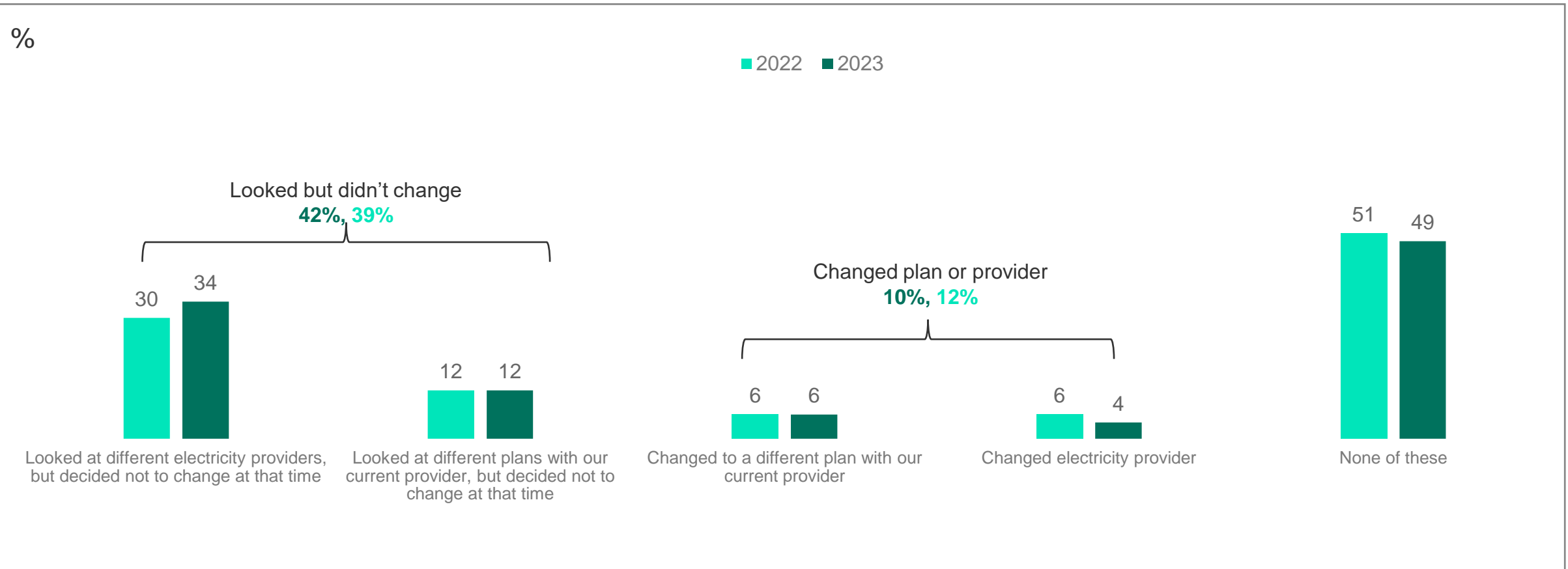


Compared to 2022, there is no change in the length of time small businesses have been with their current electricity provider.

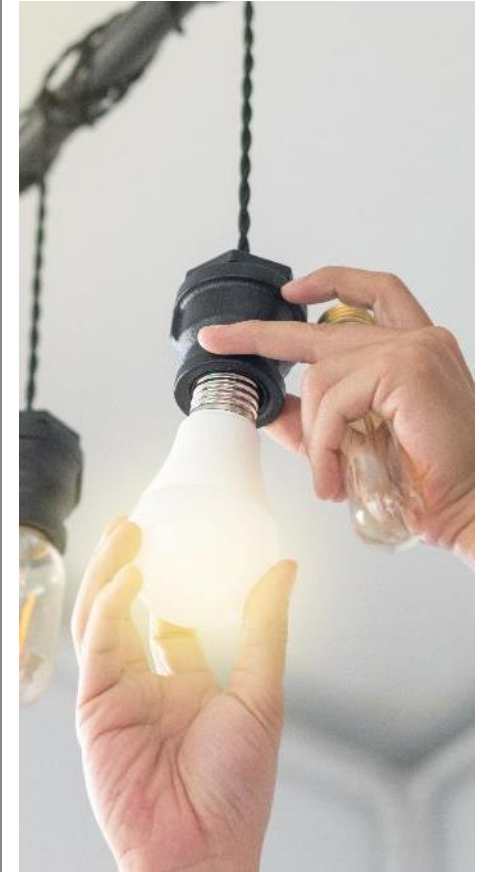
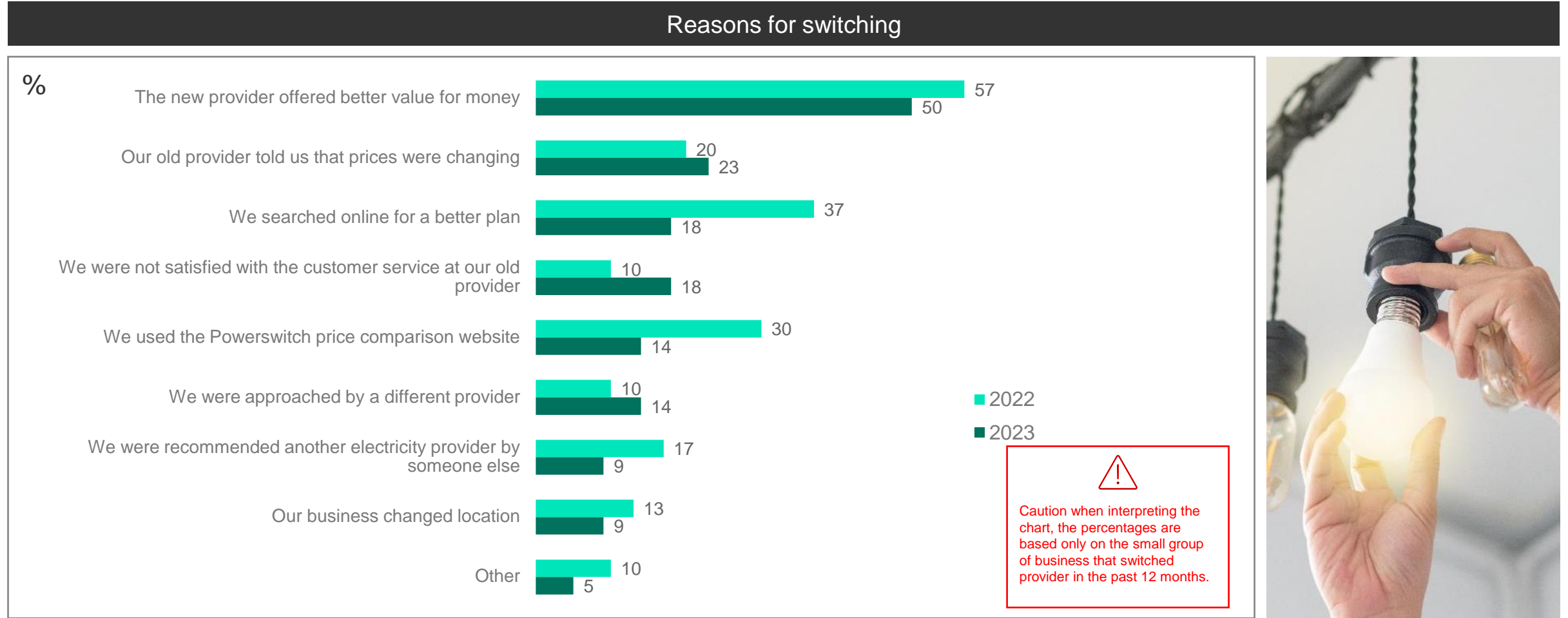


Switching behaviours among small businesses is relatively similar to 2022.

Switching behaviours in the past 12 months

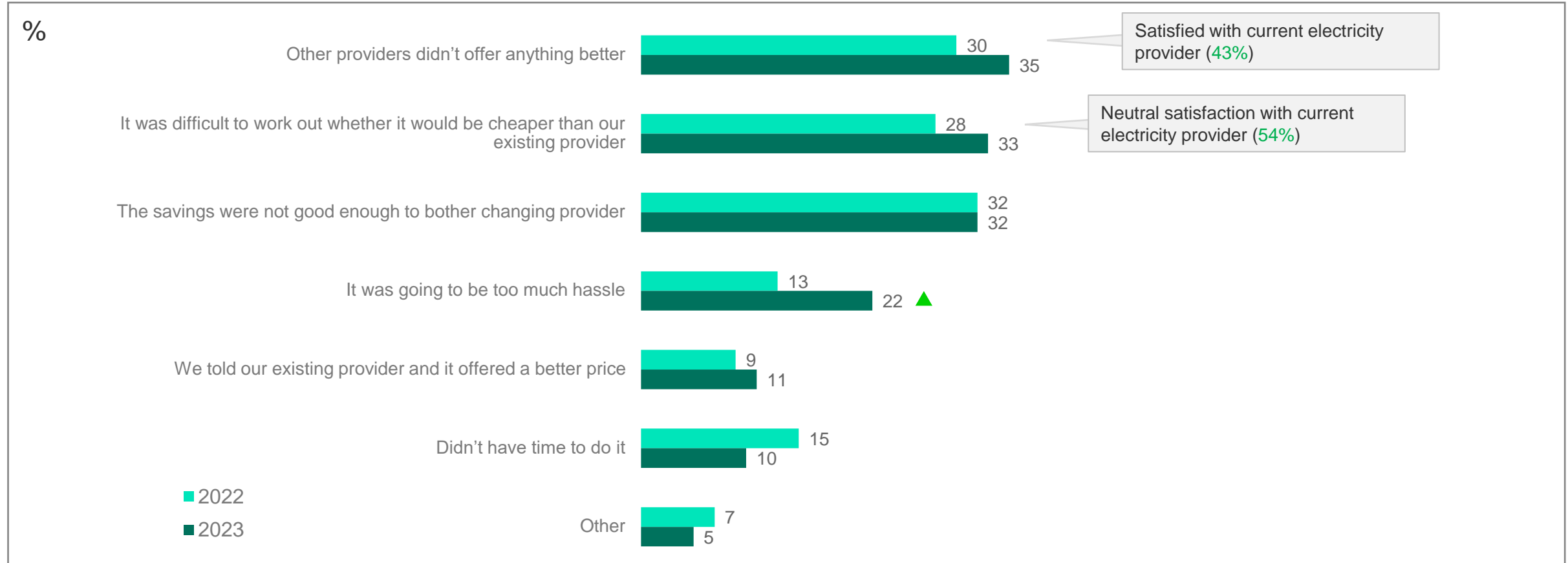


Better value for money remains a key motivator for small businesses to switch electricity provider. Note: a small sample size for 2023 means results should be treated with caution.



For the 34% of businesses that decided to stick with their current provider, the key reasons for doing so are still around the perception that they wouldn't be better off by switching. In 2023, one in three (33%) businesses thought it would be too difficult to work out if switching would make things cheaper and one in five (22%) businesses didn't think it would be worth the hassle; an increase of 9pts since 2022.

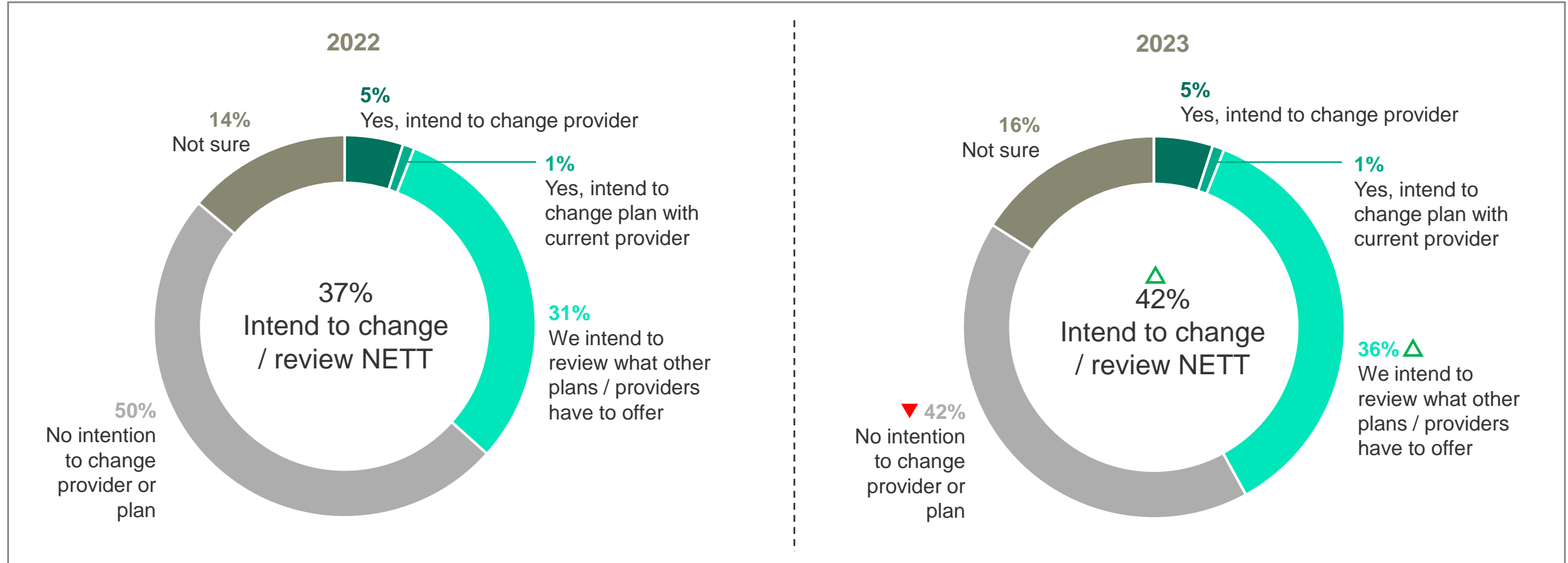
Reasons for deciding not to switch



▲ ▼ Significantly higher/lower than 2022

Compared to 2022, more small businesses intend to review other plans or providers; up 5pts (and significant at the 90% confidence level).

Switching intentions over the next 12 months



05

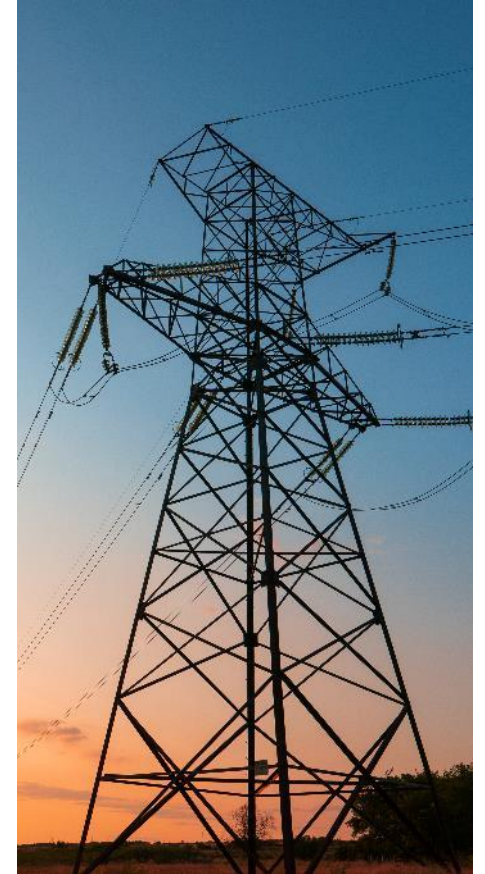
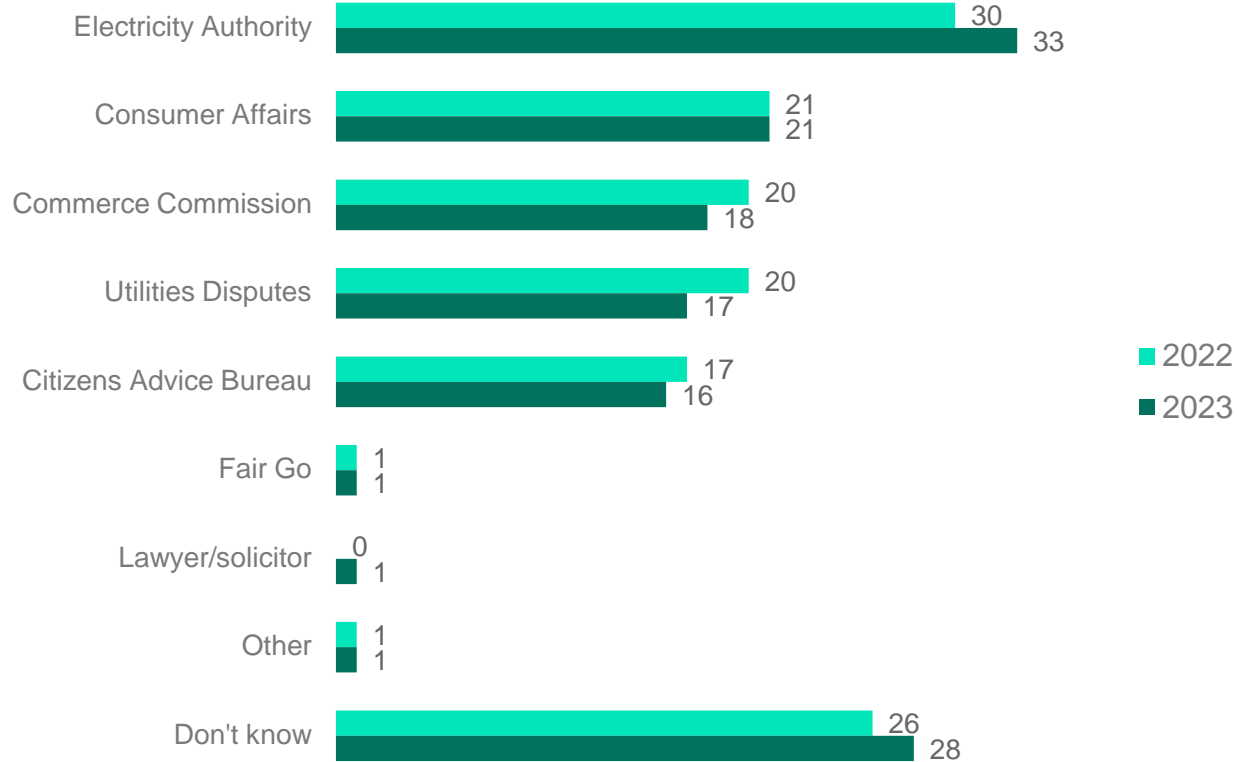
Knowledge about and
confidence in the
electricity market



Like 2022, the majority of NZ small businesses feel they would know who to contact if they had a complaint that couldn't be resolved with their electricity provider; the Electricity Authority is still the most common.

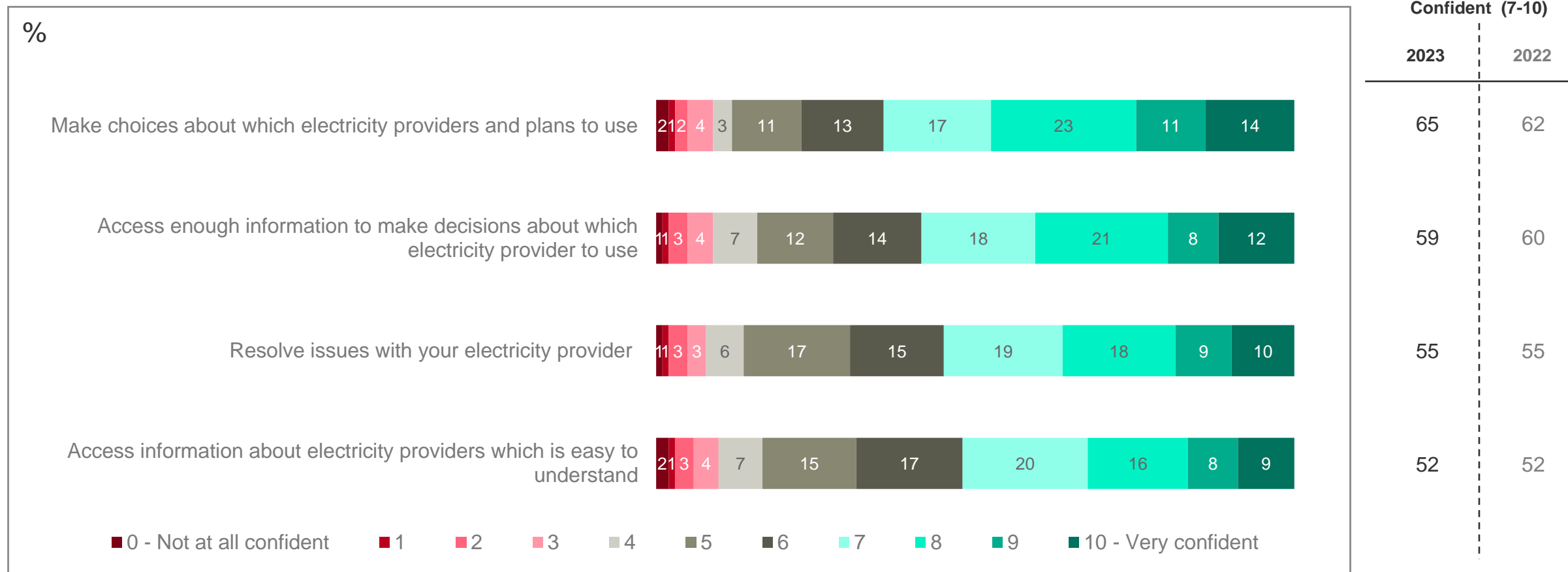
Complaint resolution

%



Since 2022, there has been no meaningful change in the proportion of small businesses that feel they can make choices and access information about electricity providers. The majority feel they can choose providers and access enough information to do so. Just over half of small businesses feel confident they resolve issues and access easily understood information.

Making choices and accessing information



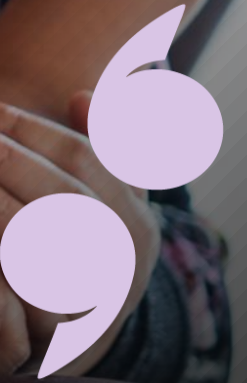
Small business' confidence in the sector providing a reliable electricity supply remains fairly low, and confidence is even lower for the release of technology changes that will help manage costs or for better outcomes around customer service.

Confidence the electricity market will provide better outcomes in the next five years for...



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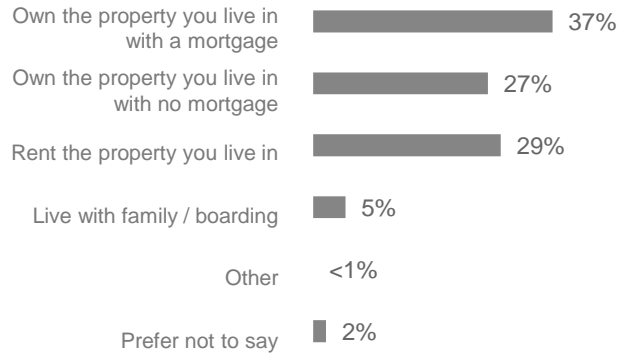
Sample profiles



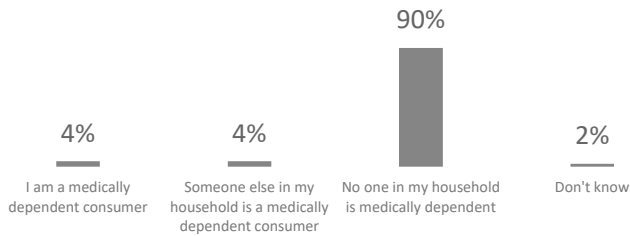
Who took part – Total New Zealand residents



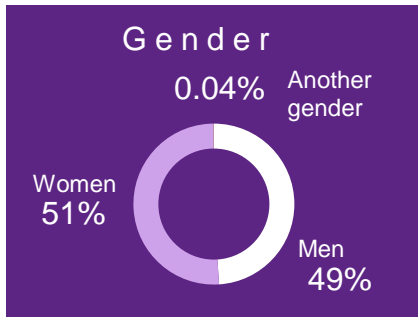
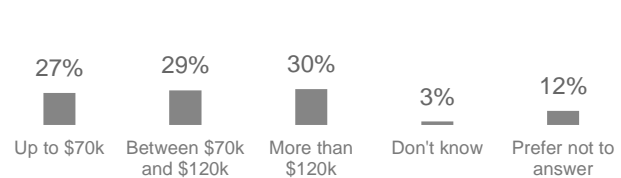
Home tenure



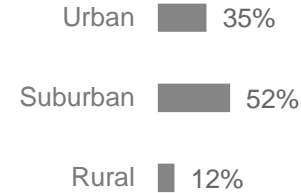
Medically dependent households



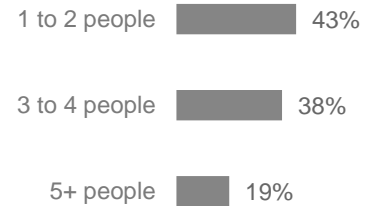
Household income



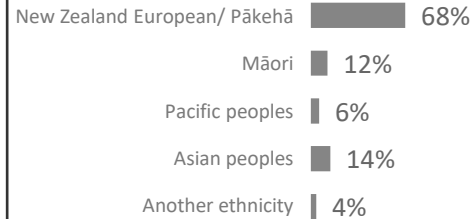
Area type



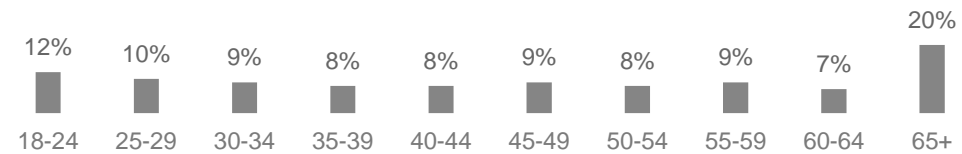
Number of people in household



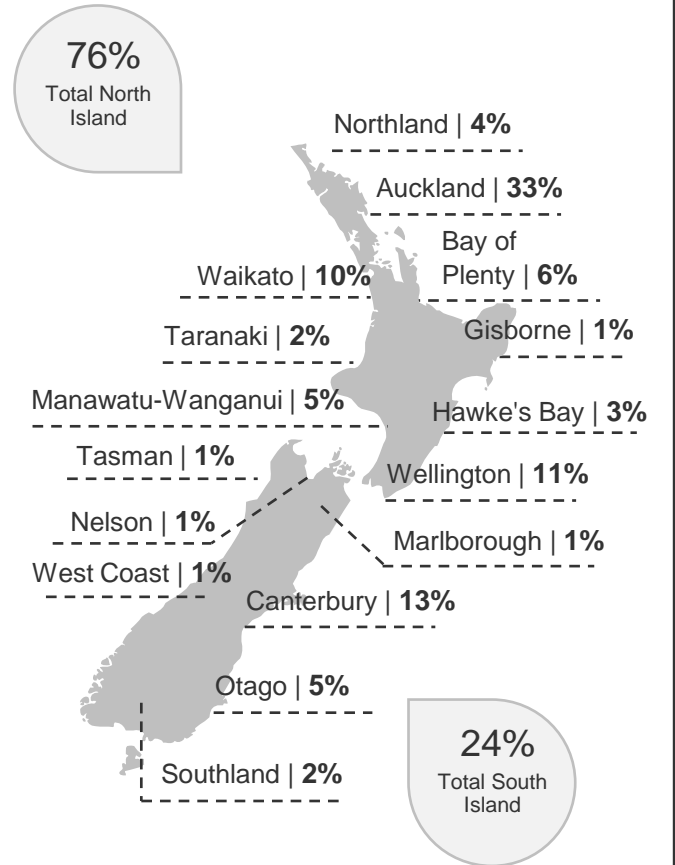
Ethnicity



Age



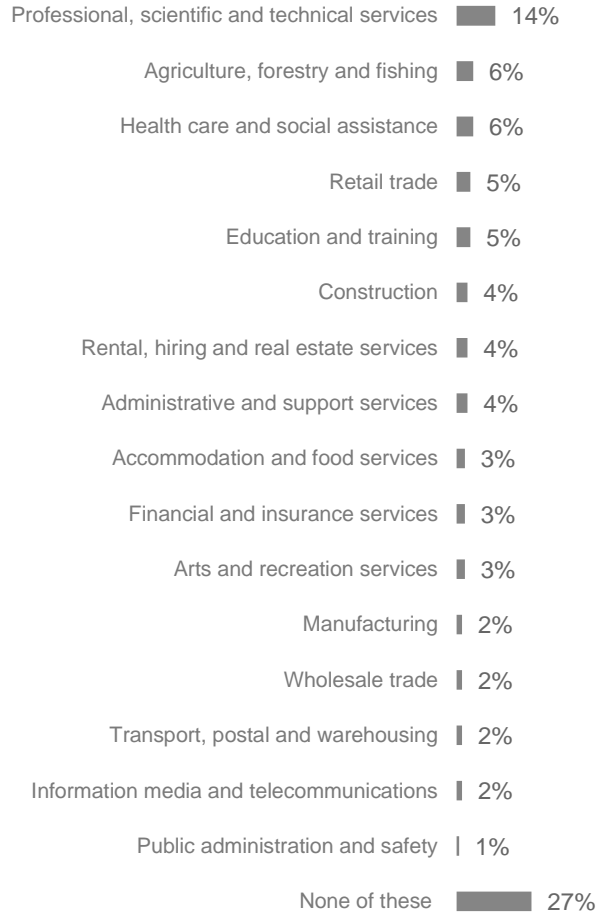
Region



Who took part – New Zealand Small businesses



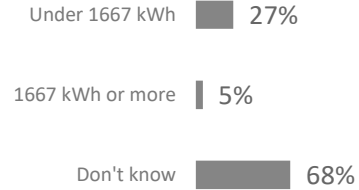
Industry



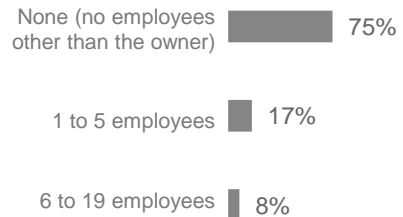
Gender



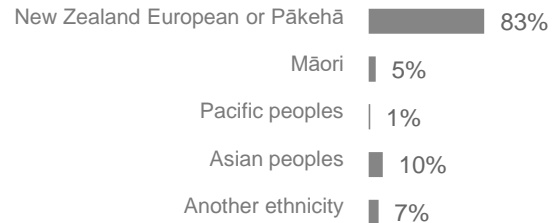
Electricity consumption per fortnight



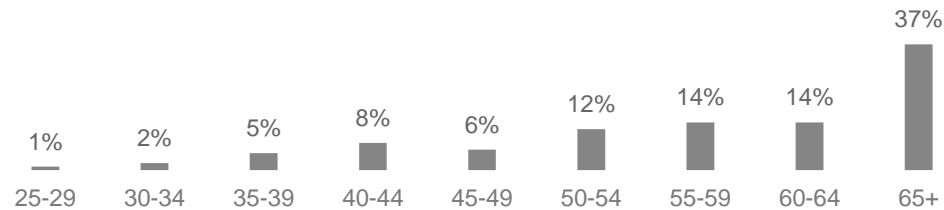
Business size



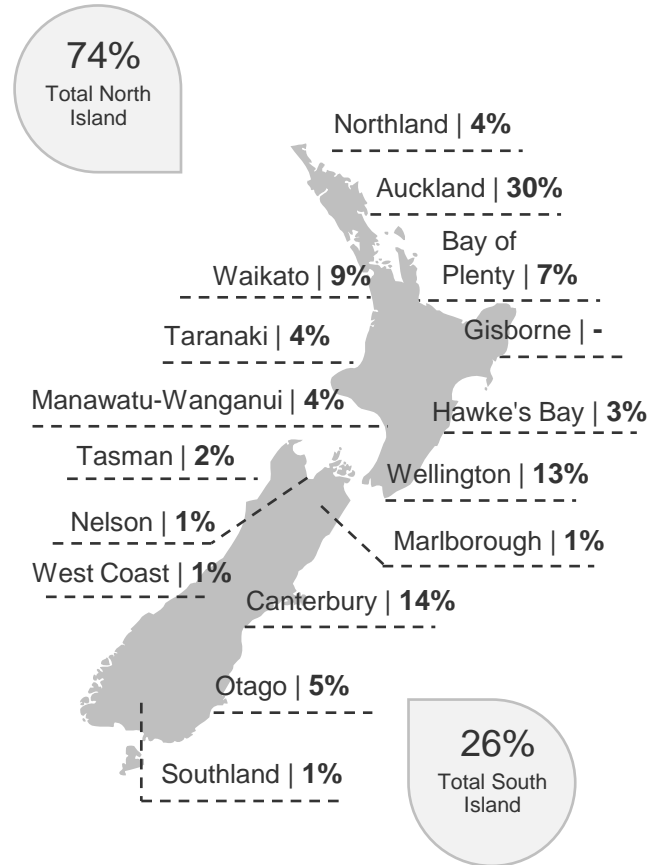
Ethnicity



Age



Region





FOR FURTHER INFORMATION PLEASE CONTACT

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