2026 EDB energy hardship survey: summary report

Date: 03/08/2026

Survey delivery and summary report by Vector

- *Analysis and report by Evelyn Hunsberger (evelyn.hunsberger@vector.co.nz)*
- *Survey development by Anca Cernic (anca.cernic@vector.co.nz)*

Administrative support from ENA

- *Megan Baker (megan@electricity.org.nz)*

Executive summary:

The 2026 EDB energy hardship survey shows that lines companies are actively contributing to energy hardship initiatives. The sector is focussed on locally led initiatives rather than a coordinated and scaled action. With responses covering almost 90% of national connections, this year's survey provides the strongest sector-wide view to date of how EDBs are responding to energy hardship.

The results show that EDB activity remains broad, locally grounded and partnership-based. Respondents identified around 40 initiatives and approximately 50 partnership or collaborations. These initiatives span advice and assessments, home efficiency support, bill relief and funding, community outreach, and data-led trials.

Several themes were consistent across the survey. EDBs commonly see their role as local connectors, funders and enablers rather than direct social-service providers. Partnerships with trusted community organisations remain central to identifying need and delivering support. At the same time, many EDBs are still developing more formal approaches to strategy, resourcing and impact measurement.

There is positive momentum through the EDB Energy Hardship Forum and growing interest in sector collaboration. However, only three participating EDBs currently have a formal energy hardship strategy or roadmap, and some resourcing indicators were stagnant or lower in 2026 than in 2025, including reported staff hours and projected budgets. These changes should not be interpreted as a clear trend yet, but they should be monitored in future surveys.

The opportunity for the EDB energy hardship forum in 2027 is to continue sharing learnings, while also building shared capability: clearer strategies, stronger impact measures, more coordinated partnerships, and one or more collective initiatives that explore the value of coordinated EDB action.

Table of contents:

Background on the EDB Energy Hardship Forum:

The EDB Energy Hardship Forum was established in early 2025 as a collaboration and support network for lines companies working on energy hardship. The idea followed an ERGANZ hui in November 2024, where participants identified that silos across industry, community organisations and government were limiting progress. The forum was created as a practical way for EDBs to start addressing those silos within the sector by sharing insights, lessons and opportunities for collaboration.

The forum gives EDB members a place to share best practice, ask for advice, learn from initiatives already underway across the motu, and avoid duplicating effort when developing projects, partnerships and strategies.

Since its establishment, the group has held four hui covering a mix of EDB case studies, sector research and community perspectives. Topics have included Network Waitaki's energy education event with Powerswitch, The Lines Company's hardship initiatives and steering committee, Consumer NZ's energy consumer research, Orion's Community Energy Activator, Dr Sea Rotmann's work on hidden hardship, Powerco's approach to developing an energy hardship position, and perspectives from Community Energy Network and Sustainability Options on how EDBs can engage for the greatest impact.

This annual survey supports the forum by creating a regular status check, helping EDBs track progress, identify emerging priorities and understand how activity in the energy hardship space is changing over time.

Survey objectives:

The objective of the survey is to help EDBs:

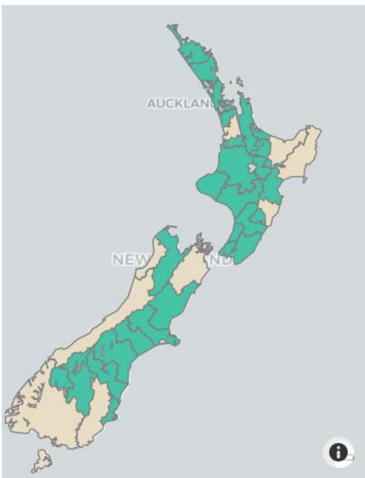
- replicate energy wellbeing initiatives that have worked well for others
- save on costs and resources by not reinventing the wheel and sharing tips on value-for-money initiatives
- establish connections across other EDBs — so they can reach out to particular people who may have already explored certain initiatives
- arm EDBs with national info/stats that can be shared with their communities and the wider sector about what EDBs are doing to help people in energy hardship.

The raw survey data from both years is hosted on ENA's SharePoint and will not be publicly available. To share the data outside of ENA and participating EDBs, consent from the participating EDBs is required. This report with the aggregated data will be available to the public.

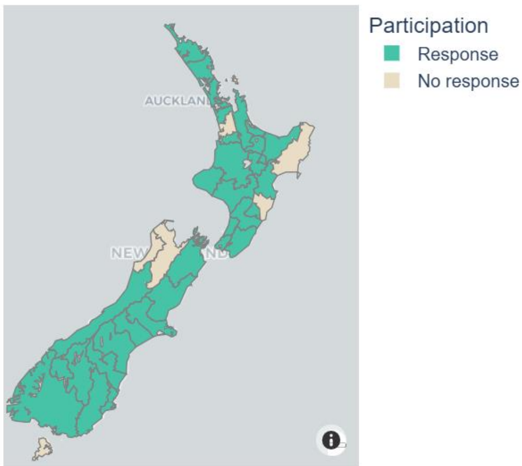
Participation:

In 2025, 18 (67%) of the 27 lines company businesses participated in the survey, representing 86% of all national connections. In 2026, 21 of the 26 (80%) lines company businesses participated[1], representing 89% of all national connections. The coverage of both years provides an almost nation-wide view of the EDB energy hardship initiatives.

Figure 1: Map of survey participants



2025 EDB survey participation



2026 EDB survey participation

[1] Tasman and Nelson Electricity merged in 2026, bringing the total number of businesses down to 26. PowerNet is a single business that holds three lines companies (Electricity Invercargill, OtagoNet JV and The Power Company)

List of 2026 EDB survey participants (new participants in bold):

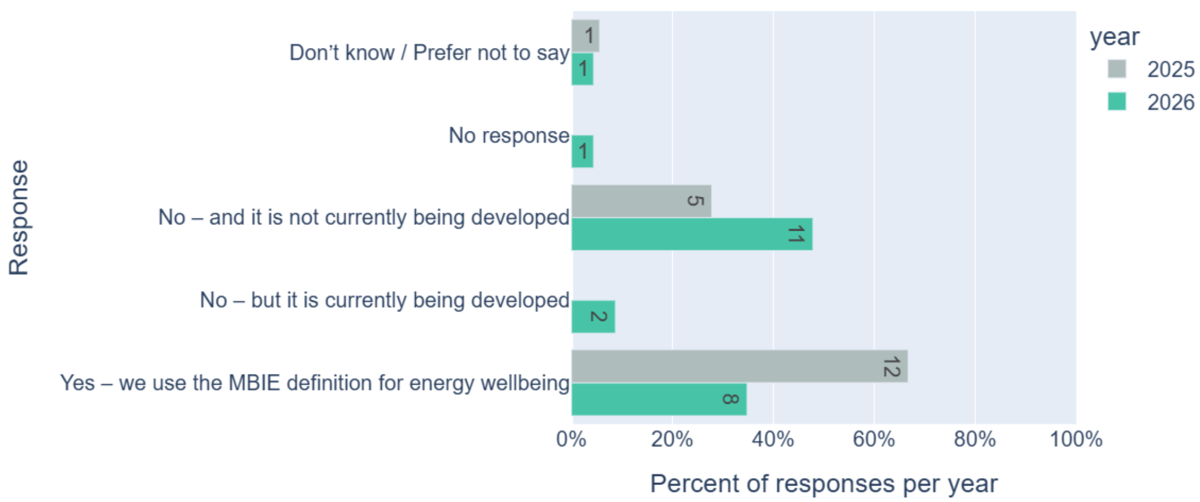
1. Alpine Energy
2. Aurora Energy
3. Counties Power
4. Electra
5. Electricity Ashburton
6. **Horizon Energy**
7. MainPower NZ
8. **Marlborough Lines**
9. Network Waitaki
10. Northpower
11. Orion New Zealand
12. Powerco
13. **PowerNet (Electricity Invercargill, OtagoNet JV, The Power Company)**
14. Scanpower
15. The Lines Company
16. Top Energy
17. Unison Networks
18. Vector
19. Waipa Networks
20. Wellington Electricity
21. **Westpower**

Results:

Definitions and strategy

In 2025, almost 70% of EDBs used the MBIE definition of energy wellbeing within their organisation. In 2026 this dropped to 35%, with the percent of EDBs not having an agreed definition of energy hardship (and not currently developing one either) growing from 30% to almost 50%. It is difficult to say whether EDBs are intentionally switching away from the MBIE definition or whether the reduction in usage is simply because the definition has been getting less publicity since its release in 2022[2]. Two EDBs responded that they are developing their own definition of energy hardship. It will be interesting to see how this progresses in 2027. One opportunity for the group is to agree on a common definition of energy hardship that can be used consistently across EDBs.

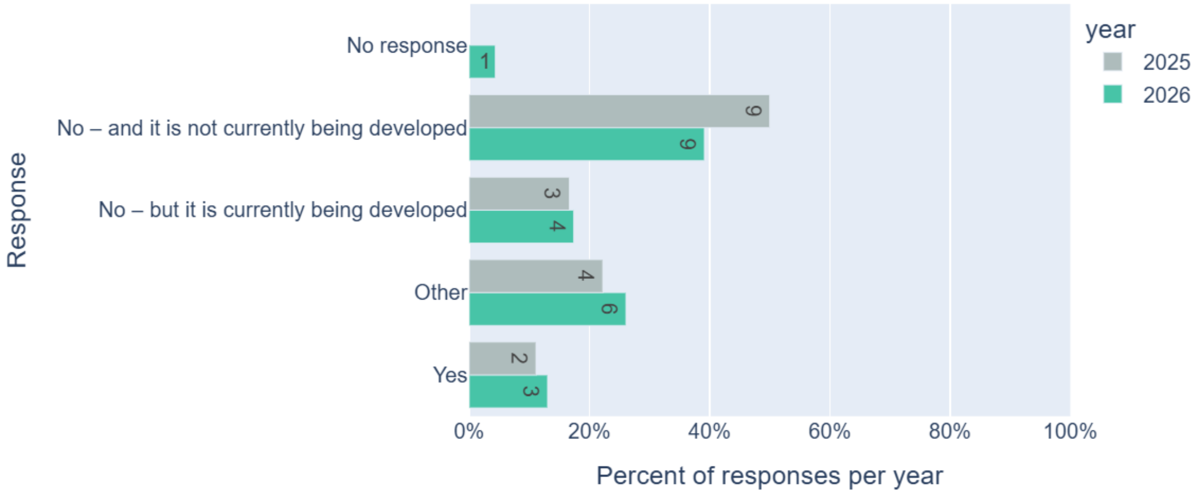
Figure 2: *Does your organisation have an agreed definition of energy hardship?*



[2] MBIE: reporting on energy hardship measures

While many EDBs are working in the energy hardship space, only 3 (~13%) of participating EDBs have an energy hardship strategy or roadmap. Several EDBs are in the process of developing one, but around 40% do not have one and are not planning on developing one. Of the EDBs that responded 'Other' in 2026, most mentioned plans and direction, but not necessarily a robust energy hardship specific strategy. This suggests that while energy hardship activity is widespread, it is often still being delivered through individual initiatives rather than guided by formal long-term plans.

Figure 3: *Does your organisation have an energy hardship strategy/roadmap?*



EDBs were also asked the free text question, "In your opinion, how can EDBs support the needs of customers in energy hardship?"

Similarities between 2025 and 2026 responses:

- **Community partnerships remain central:** In both years, EDBs see their strongest role as supporting organisations that already work directly with households in hardship, rather than trying to deliver services themselves.
- **Education and energy literacy are still a major theme:** Both years mention helping customers understand bills, use tools like Powerswitch/Billy, improve energy efficiency, and access practical advice.
- **Direct practical support continues to feature:** Installations of LED bulbs, curtain banks, winter warmer packs, home assessments, healthy homes support, and similar direct-support initiatives appear across both years.
- **Collaboration is consistently viewed as essential:** Both years emphasise working with other EDBs, retailers, government agencies, community organisations, iwi, social service providers and sector groups.
- **Data and research are seen as part of the EDB contribution:** Both years reference using EDB insights, consumption data, socio-economic data or research partnerships to better understand where hardship exists and how support can be targeted.
- **There is still no single agreed view of the EDB role:** Responses in both years show that EDBs recognise energy hardship as complex and multi-faceted, with some uncertainty about where EDB responsibility starts and ends.

Strongest differences and shifts in 2026

- **A greater emphasis on local convening:** 2026 responses more often describe EDBs as well placed to build local relationships, bring community providers together, and understand the support landscape in their regions.
- **A stronger coordination focus:** 2026 responses place greater emphasis on avoiding duplication, sharing learnings, and taking a more coordinated approach across EDBs and the wider energy sector.
- **More mention of a responsibility to reduce underlying energy costs:** 2026 responses more often mention the EDB's responsibility to maintain affordability and keeping costs down for vulnerable consumers.
- **More explicit reflection on EDB role boundaries:** 2026 responses more directly acknowledged that EDBs have a role, but that role needs to be defined alongside retailers, government, community providers and other parts of the sector.

Some direct quotes from individual EDB respondents are included below. These reflect respondent perspectives and may not represent formal organisational positions:

"EDBs have the ability to engage and make connections at the local levels, often far more easily than retailers. It's because a lot of EDBs bring a community focused, are owned by their community, have local shareholders etc."

"There are many ways we can support our communities, but we won't know where we'll have the most impact until we've made those connections and had those conversations."

"From an industry wide EDB perspective, there's also an opportunity to take a more coordinated approach — for example, a cohesive campaign that uses our collective channels to deliver consistent messages at the same time. More broadly, collaboration across the energy sector would be valuable. For most people, the distinctions between EDBs, Transpower, and retailers aren't clear — electricity is seen as a single service. A more joined-up, industry-wide approach would better reflect how customers experience energy and strengthen the overall impact.

Our commercial team/ELT/Board would discuss energy hardship as part of setting and approving the annual line charge increases.

EDBs should be clear about their role. We do not set retail electricity prices or provide direct hardship support in the same way as retailers, government agencies or social organisations. However, we influence long-term affordability through the way we plan, build, maintain and operate the network. Industry collaboration is important. EDBs can share learnings, partner on common tools and approaches, support consistent customer journeys, develop shared flexibility and load-management protocols, and work with ENA, retailers, community organisations, iwi, councils and government agencies to avoid duplication and improve outcomes for customers most at risk.

EDBs were also asked the free text question, “Please tell us more about how your organisation identifies or targets households in energy hardship.”

Similarities between 2025 and 2026

- **Use of deprivation and socioeconomic data:** In both years, EDBs referenced using deprivation indexes, census data, household income, and customer segmentation to identify areas or groups more likely to experience hardship.
- **Reliance on community partners:** Both years show that many EDBs identify households through trusted local organisations, community agencies, local councils, budgeting services, programmes such as EnergyMate, Warmer Kiwi Homes, Ecobulb, and other providers with direct community reach.
- **Community engagement as an identification pathway:** Both years mention events, expos, marae, local festivals, and community hui as ways to reach or identify households needing support.
- **Acknowledgement that targeting is still developing:** In both years, some EDBs state they do not identify households directly, are still developing their approach, or are relying on broader community initiatives rather than direct targeting.

Strongest differences and shifts in 2026

- **More focus on mapping the local support landscape:** 2026 responses include more examples of EDBs working with local groups to understand how hardship appears in their region, what services already exist, and where gaps or opportunities may be.

Resourcing

In both years, most EDBs had 1-5 staff involved in energy hardship work at their organisation, one outlier had over 12 staff in 2025 and 11 in 2026. Across both years, most EDBs spend between 1-10 hours per month working on energy hardship. The median of both years was 6.5 hours.

Figure 4: *How many people within your organisation work on energy hardship?*

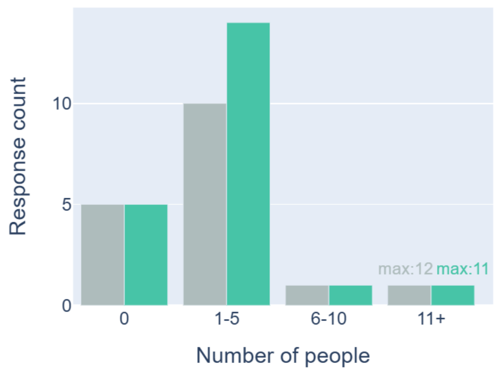
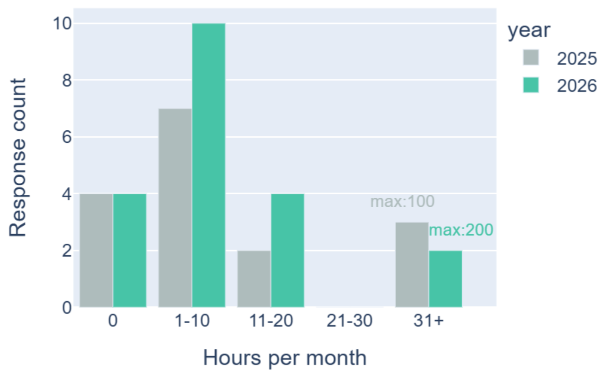


Figure 5: *Approximately how many total hours per month does your organisation, across all staff involved, spend working specifically on energy hardship?*



Some EDBs currently have no energy hardship programmes or initiatives in the pipeline, but most EDBs focus on 1-2 key energy hardship initiatives per financial year, and around half have 3 or more per financial year. The number of EDBs with 3 or more programmes planned for the next financial year has grown, which is a promising development.

Figure 6:** How many different energy hardship programmes/initiatives has your organisation been involved in or led in the **last financial year**[3]**?

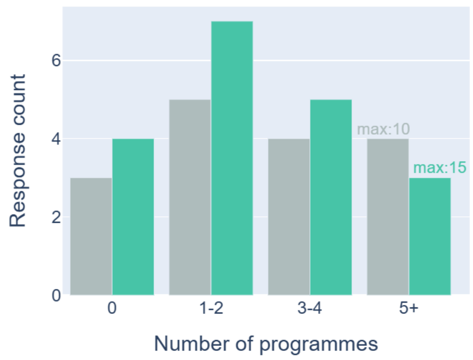
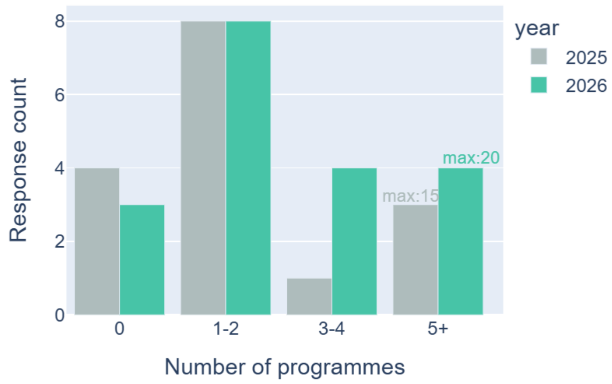


Figure 7:** How many different energy hardship programmes/initiatives will your organisation be involved in or lead in the **next financial year**[4]**?



The budget for energy hardship initiatives varied significantly across EDBs (note: several EDBs did not provide an answer to this question). The mean projected budget for the next financial year was $72,000 in 2025 and up to $82,000 in 2026, with the median dropping from $27,500 to $21,000. The drop is the median is likely due to the number of EDBs in the $100k-$200k interval dropping. It will be important to monitor whether the decrease in budget from 2025 to 2026 is a trend that continues into 2027, or just some year-to-year fluctuation.

Figure 8:** Approximately how much (excluding costs associated with time spent by internal employees) has your organisation spent on hardship programmes/initiatives in the **last financial year**[3]**?

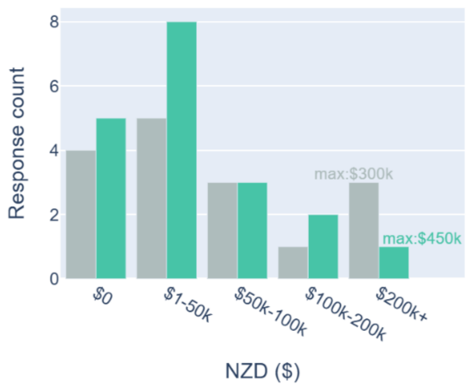
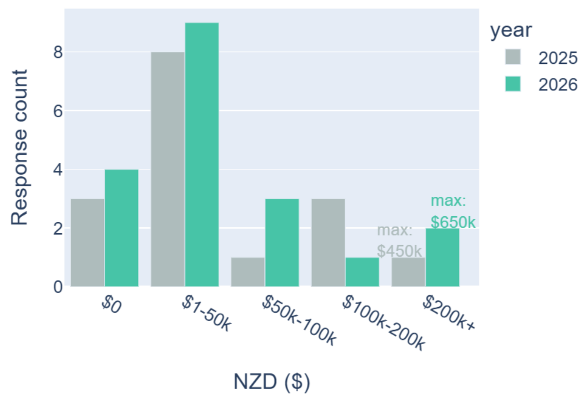


Figure 9:** Approximately how much (excluding costs associated with time spent by internal employees) will your organisation spend on hardship programmes/initiatives in the **next financial year**[4]**?



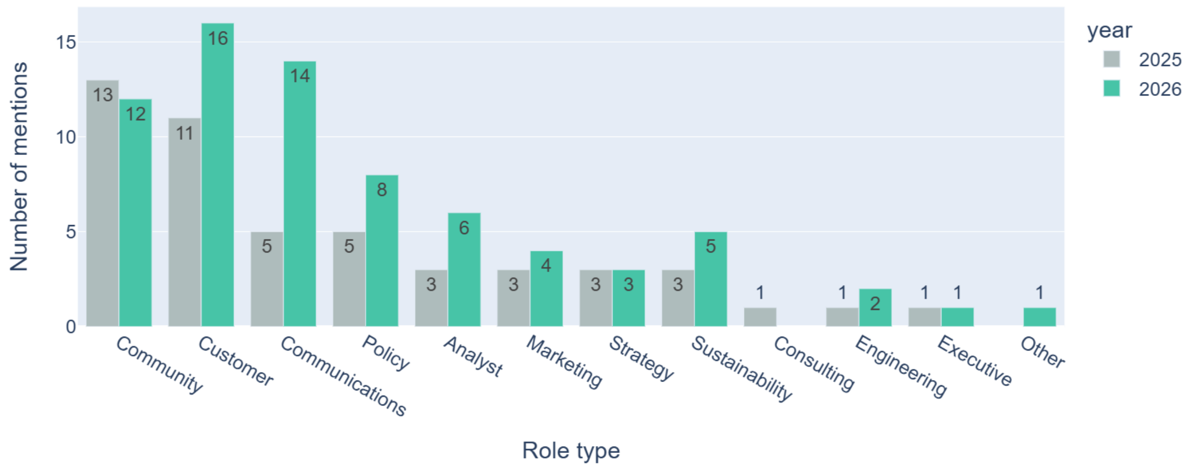
---

[3] In the 2025 survey this was framed as the "last 24 months." To remove time period overlap, this has been replaced with "the last financial year".

[4] In the 2025 survey this was framed as the "next 12 months." For consistency, this has been replaced with "the next financial year."

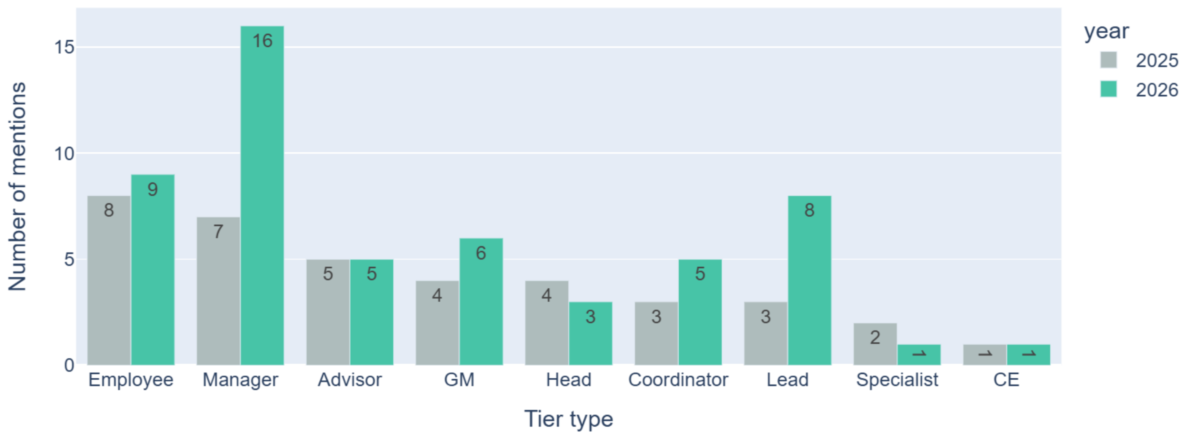
One notable difference between the 2025 and 2026 survey responses is an increase in employees with "customer" or "communications" in their title. This may indicate that energy hardship work is increasingly being positioned within customer experience, engagement or communications functions

Figure 10: *Role types of people working in the energy hardship/wellbeing space*[5]



Across both survey years, responses show that energy hardship work involves people at a range of hierarchy levels within EDBs. The most notable change between 2025 and 2026 was the increase in managers and leads involved in this work, with both counts more than doubling, while other role types remained relatively stable. The involvement of managers, GMs, heads and leads suggests that energy hardship initiatives are not only being delivered at an operational level, but are also receiving support from people with decision-making authority.

Figure 11: *Hierarchy levels mentioned in the survey*[5]*.*



[5] The grouping logic used in this report is slightly different to last year's report so some of the counts for 2025 responses may differ slightly between reports. Note that if a title can fit into two role types it is included in each.

Initiatives

Respondents listed ~40 energy hardship initiatives or projects across the 2026 survey responses. These ranged from energy education, home assessments, home efficiency upgrades, through to community outreach, partnership-based delivery, and data-led trials.

Advice, assessments and energy literacy

- Home energy advice and assessments (including group and individual sessions, Consumer NZ material, household energy conversations, home energy toolkits, Sustainability Options workshops, and in-home visits through Ngāti Pāhauwera, Te Whatu Ora, Taupō Budget Services and Weave Hawke's Bay).
- Retailer comparison and switching support (including Powerswitch and Billy assessments, promotion at an A&P Show, advertising, social media, and support from EDB staff).
- Energy literacy communications and awareness (including newsletters, information about bills and savings opportunities, community workshops, presentations to community groups, and educational/awareness programmes).
- Sector and staff learning (including the Energy Wellbeing and Resilience conference).

Direct household support and home efficiency

- Practical efficiency products (including LED lights, low-flow shower heads, slow cookers, and items provided through assessments, giveaways or winter packs).
- Healthy homes support (including curtains for health-at-risk individuals, Community Energy Action support, WISE Whanganui healthy homes initiatives, and WISE Heat Kits into Schools).
- Winter support packs (including winter wellness packs with slow cookers, grocery vouchers, meal ingredients, fresh produce and energy-efficient home products).

Funding, credits and sponsorship

- Bill relief and customer credits (including Pay Ya Power, $500 winter power bill credits, and power credits schemes[6]).
- Funding or sponsorship for community delivery (including a $100k fund tendered to organisations delivering hardship support , funding to Energise Otaki, funding to MidCentral Health for curtains, and Community Energy Action sponsorship).
- Co-funding for home improvement programmes (including Warmer Kiwi Homes insulation and heat pump installation co-funding).
- Support for community energy projects and community resilience hub projects.

Community outreach, referral and coordination

- Community presence and promotion (including pop-ups, stalls, A&P Show attendance and Warmer Homes Expo attendance).

[6] EDBs collectively contribute $500k per year into the power credits scheme. Only two EDBs mentioned this in their responses, and it's unclear if any included it in their budget calculations.

- Service navigation and coordination (including proposed support for a hub showing what organisations offer, what support is available, who is eligible and how people can access help).

Data, insights and strategy

- Data-led trials and analytics (including a half-hourly consumption data trial to identify potential faulty appliances of customers in hardship).
- Customer segmentation and vulnerability insights (including work to improve understanding of vulnerable households across the network footprint and support better targeting of assistance).
- Embedding affordability and vulnerability into planning (including network planning, investment, customer engagement and Strategic Asset Management Plan (AMP) refresh processes, with links to non-network and flexibility options).

EDBs referenced a similar range of monitoring methods across both years, with responses largely focused on activity counts, partner reporting, feedback, and surveys. Overall, impact monitoring appears to remain relatively light-touch and variable across EDBs, with many organisations relying on third-party providers or programme partners to report outcomes.

Quantitative metrics:
- Number of in-home assessments and community hui delivered
- Number of workshops or attendees
- Number of households/whānau/individuals assisted
- Tracking of physical improvements (e.g. insulation installed, heat pumps added)
- Engagement measures, such as pop-up attendance, bill comparison visits, customer conversations, or programme participation

Reporting systems:
- Regular check-ins with partner organisations such as EnergyMate or local community providers
- Mid-point and end-of-year reports from programme administrators

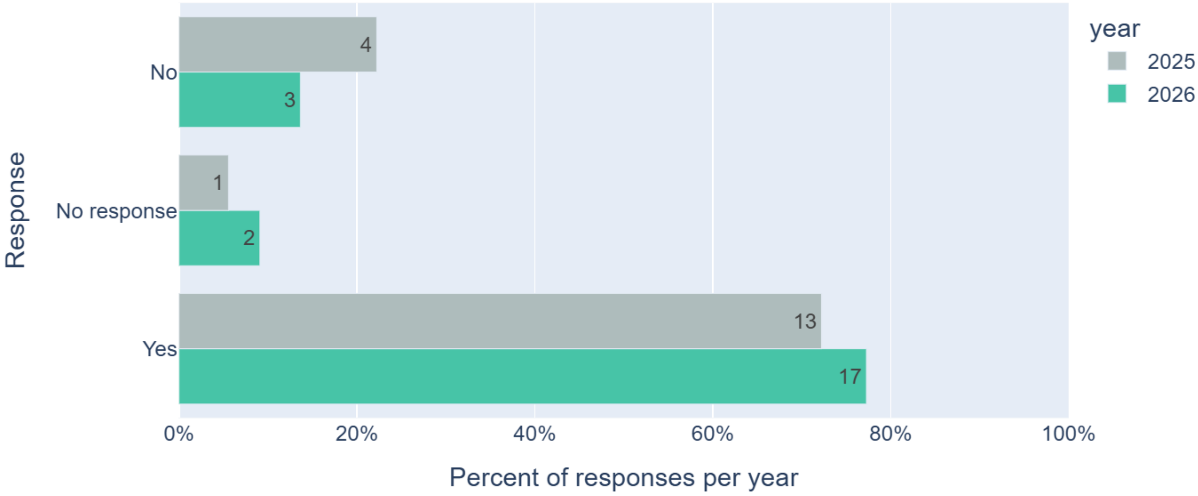
Feedback and surveys:
- Follow-up surveys with programme participants
- Community engagement and feedback gathering

Similar to 2025, EDBs noted challenges with monitoring, such as low response rates to surveys or a lack of current monitoring for discontinued programmes. The level of monitoring varies among EDBs, with some having more comprehensive systems in place than others. Another emerging opportunity is for EDBs to develop a consistent way to measure impact so that programmes can be compared and improved more effectively.

Partnerships and collaboration

Across both years, almost 80% of participating EDBs reported partnering with other organisations or community groups in the energy hardship space. This reinforces one of the strongest themes across the survey: EDBs generally see their role less as direct social-service providers and more as local enablers, funders and connectors. The partnership responses also align with earlier findings that many EDBs rely on trusted local organisations to identify households experiencing hardship, deliver support, and understand where needs are greatest. Given that only a small number of EDBs currently have formal energy hardship strategies, these partnerships appear to be one of the main ways EDBs are translating community intent into practical action.

Figure 12: *Has your organisation partnered with other organisations or community groups in the energy hardship space?*



Based on the 2026 survey responses, respondents named ~50 unique partnership or collaborations in the energy hardship space. Organisations were largely local councils, community wellbeing providers, iwi/Māori organisations, health and social service providers, budgeting services, housing organisations, and sector bodies. This highlights that EDB partnerships in energy hardship are often highly place-based and rely on trusted local organisations with direct relationships into communities.

Organisation mentioned more than once:

1. Citizens Advice Bureau (mentioned twice)
2. Ecobulb (mentioned 3 times)
3. EECA / Energy Efficiency and Conservation Authority (mentioned 3 times)
4. EnergyMate (mentioned twice)
5. Sustainability Options (mentioned 3 times)

Other organisations mentioned:

1. Age Concern
2. Anglican Family Care
3. Aukaha
4. Budget Advisory Services
5. Cambridge Community House
6. Community Energy Action
7. Community Energy Network

8. Community Wellbeing North Canterbury
9. Connecting Mid Canterbury
10. Corrections
11. Civil Defense
12. Energise Otaki
13. ERGANZ
14. FamilyWorks
15. Greenside Energy Solutions
16. Hakatere Marae
17. He Kāinga Oranga
18. Kahumoe kaupapa/PJ Project
19. Kainga Aroha
20. Kāinga Whakatipu
21. Ko Wai Au
22. Mackenzie District Council
23. Mai Lighthouse
24. Maru Trust
25. MidCentral Health
26. Neighbourhood Support
27. Ngāti Pāhauwera
28. Oamaru Pacific Island Community Trust
29. Otago Housing Alliance
30. Presbyterian Support
31. Salvation Army
32. Senior Citizens
33. Southland Warm Homes Trust
34. Stronger Waitaki
35. Taupō Budget Services
36. Te Kirikiri Housing project
37. Te Whatu Ora
38. Timaru District Council
39. Together Hurunui
40. Trust Horizon
41. Waimate District Council
42. Waitaki District Council
43. Waitaki Multicultural
44. Weave Hawke's Bay
45. Whaiora Whanui Trust
46. WISE Charitable Trust - Whanganui
47. WISE Healthy Homes – Taranaki

Next steps:

The 2025 report identified several next steps to strengthen collaboration and support more consistent energy hardship activity across EDBs. The table below summarises progress against those actions, based on the 2026 survey results and activity through the EDB Energy Hardship Forum.

2025 next step	2026 progress status	Comment
Establish the EDB Energy Hardship forum	Happening	The EDB Energy Hardship Forum has been established, with quarterly hui held during the year and positive feedback from participants.
Create a digital energy hardship hub for EDBs to share strategies, projects and success metrics.	Happening	An ENA-hosted SharePoint is available as a shared space for survey data, reports, examples, learnings and other useful resources.
Develop comprehensive energy hardship strategies and roadmaps across EDBs.	Still needs work	Only three participating EDBs currently have an energy hardship strategy or roadmap. Several EDBs are developing plans or direction, but formal strategies remain uncommon.
Continue to allocate resources and budget to energy hardship programmes.	Happening, but monitor	EDBs continue to allocate staff time and budget, but some resourcing indicators were lower in 2026, including projected budgets. This may reflect year-to-year fluctuation rather than a clear trend, but should be monitored in future surveys.
Continue to build and strengthen partnerships with existing organisations and programmes working within communities.	Happening	Almost 80% of participating EDBs reported partnering with other organisations or community groups in both years. Around 50 unique organisations were mentioned in 2026, showing that partnerships remain one of the main ways EDBs work in this space.
Develop consistent methodology for measuring programme impact.	Emerging opportunity	If EDBs want to more consistently and effectively measure programme impact they could develop shared metrics. The Energy Wellbeing Evaluation Consortium (or any current/future iterations of this group) could be a potential partner to ground the methodology in best practice.
Explore opportunities for EDBs to collaborate on a shared initiative with national or sector-wide benefit.	Emerging opportunity	Several members have indicated interest in collaborating on a shared initiative, but the group has not yet agreed what this could be or how it could be funded.

Conclusion:

The 2026 survey provides a broader view of EDB activity in the energy hardship space than the first survey in 2025. Participation increased from 18 EDBs in 2025 to 21 EDBs in 2026, lifting coverage from 67% to 80% of lines company businesses and from 86% to 89% of national connections. This stronger participation means the survey is now closer to providing a sector-wide picture of how EDBs are responding to energy hardship.

Overall, the findings suggest that EDB activity remains active and locally grounded, even though energy hardship is still a developing area for many organisations. Respondents listed around 40 initiatives in 2026, spanning advice, assessments, home efficiency, funding, outreach, partnerships, and data-led work. Almost 80% of participating EDBs reported partnering with other organisations or community groups, reinforcing that partnerships are one of the main ways EDBs work in this space. Rather than acting as direct social-service providers, EDBs are commonly contributing as local connectors, funders, enablers and sources of data and insight.

At the same time, several resourcing indicators were stagnant or lower in 2026 than in 2025, including average hours spent on energy hardship work and projected budgets. The median hours reported staying at 6.5 across both years. The median of the projected budgets decreased, dropping from $27,500 to $21,000 (excluding the Power Credits Scheme). These changes may reflect normal year-to-year variation, differences in respondent mix, or the influence of a small number of larger programmes. They should not be interpreted as a clear trend at this stage, but they are worth monitoring in future surveys.

The survey also shows that there is still work to do to formalise approaches to energy hardship. Only three participating EDBs currently have an energy hardship strategy or roadmap, and impact monitoring remains variable and often light-touch. However, the breadth of initiatives, the high level of partnership activity, and the involvement of people at different hierarchy levels suggest that many EDBs are actively exploring how they can contribute within their role as network businesses.

The hui held through the EDB Energy Hardship Forum have provided a useful mechanism for sharing learnings, surfacing practical examples, and building connections between EDBs working on similar challenges. Feedback from the forum has been positive, and the 2026 results suggest there is ongoing value in creating spaces where EDBs can compare approaches, avoid duplicating effort, and learn from initiatives already underway across the sector. Emerging opportunities include the agreement on a consistent definition of energy hardship, development of shared metrics of measuring programme impact and the development of national-coordinated programmes. Continued collaboration will be important as EDBs refine their role, strengthen partnerships, and develop more impactful ways to alleviate energy hardship.