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Aotearoa's Home Energy Advice Landscape

Sally Blackwell, Amanda Scothern and Jodie O'Neill

Project LR20102

Beacon Pathway, Allen+Clarke

Funded by the Building Research Levy



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1222 Moonshine Road
RD1, Porirua 5381
Private Bag 50 908
Porirua 5240
New Zealand

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About This Report

Title

Aotearoa's Home Energy Advice Landscape

ADV/02

Authors

Sally Blackwell (team leader), Amanda Scothern, Beacon Pathway; Jodie O'Neill, Allen + Clarke.

Reviewer

Dr Kate Bryson, Axon Consulting

Abstract

This report examines the home energy advice landscape in Aotearoa New Zealand. Drawing on a desktop review, online surveys of advice practitioners and managers, and interviews with stakeholders, it provides the first system-level picture of home energy advice in Aotearoa. The findings show that home energy advice is a well-established practice and a capable workforce, delivery organisations, programmes and training pathways already exist. However, this capability is dispersed across a fragmented and poorly connected system that has evolved in an uncoordinated way. Many organisations and individuals that influence household decisions do not recognise themselves as part of a wider home energy advice system, and there is no evidence of a shared understanding of how different forms of information, advice and support should work together. The research also found that effective home energy advice is relational, not simply technical, relying on trust, communication skills and cultural capability alongside technical expertise. Capability is uneven across the system, with no universal minimum competency requirements or consistent approach to ongoing professional development. At the same time, home energy advice is associated with a growing range of objectives, including housing quality, health, energy affordability, electrification and climate resilience. While these objectives are often connected through their effects on households and homes, they have largely developed through separate programmes, funding arrangements and stakeholder networks. The findings suggest that the key challenge is not whether home energy advice has a role to play, but how existing capability, services and stakeholder interests can be better connected and aligned to support improved household outcomes.

Reference

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Executive summary

This report presents the findings of BRANZ funded research into the home energy advice landscape in Aotearoa New Zealand. Home energy advice is a well-established practice, both internationally and in Aotearoa, however it has developed in an uncoordinated way. As a result, it is difficult to identify the full workforce and there is a risk of fragmented delivery, inconsistent messaging, uneven access, and advice that does not necessarily serve households well.

This research responds to a gap in understanding the current state of the home energy advice system. It sets out to identify the issues, needs and trends that will inform ways to strengthen existing services and respond to future demand. The report concludes by posing a series of questions for a proposed second phase of work to design an integrated system-focused operating framework.

The research adopted an intentionally broad definition of home energy advice, as:

> *personalised advice to help people make homes healthier, more comfortable, cheaper to run, more resource efficient, or have a lower environmental impact*

The research took a systems view. It does not regard home energy advice as a sector in a conventional sense, but has examined it through a systems lens in order to explore the linkages and intersections between different interests and stakeholders, and the significance of those connections. This approach has brought into view parts of the system that a narrower framing would have excluded.

The research drew on a desktop review of local and international evidence, online surveys of advice practitioners and managers, and stakeholder interviews spanning both established stakeholders and organisations with an emerging or wider interest in the topic. The survey and interview findings should be read as indicative rather than representative. Survey respondents were self-selected and drew most strongly from people for whom home energy advice constitutes a core part of their work. Likewise, the interviews used purposive sampling, where participants are deliberately selected to ensure coverage of key roles, perspectives and experiences relevant to the research question. Consequently, some perspectives are less fully represented, particularly those of commercial and new-build stakeholders.

Key findings

An established practice with strong foundations

Home energy advice is a long-established practice in Aotearoa, and the evidence supporting its role as an enabler of household action is substantial. Internationally, home energy advice has been delivered for several decades. In the United Kingdom, it has been provided mostly

through non-government organisations with a strong focus on reducing fuel poverty. The European Union now treats personalised advice as part of its energy efficiency and energy poverty framework, requiring member states to establish one-stop shops that support household renovation, efficient heating and uptake of renewable energy. In Australia, several state and territory governments have established publicly funded advice services, with the Australian Capital Territory's Sustainable Home Advice Program a notable example. The specific objectives vary across these jurisdictions, but with the common goal of using personalised advice to alleviate energy poverty, improve housing quality, support retrofit activity and support the transition to lower-carbon homes.

The evidence base supporting the value of advice, and what makes it effective, is equally well developed. Behaviour change theory, including Michie's (2011) COM-B model and the Energy Cultures framework (Stephenson et al., 2010), developed in Aotearoa, both support the same central point: information alone is often insufficient to change household behaviour. Decisions about housing and energy are shaped by a complex mix of household circumstances and external influences, and advice is most effective when it is personalised, delivered by a trusted source and combined with practical support, such as financial assistance or access to products and services. Warren and Foulds (2020) articulate this in three dimensions, finding that the effectiveness of advice depends on its content, its source and the process through which it is delivered.

In Aotearoa, home energy advice has developed over several decades in response to a range of concerns, including energy efficiency, housing quality, health, energy affordability, and carbon emissions. Research by Beacon Pathway, BRANZ, He Kāinga Oranga, the Energy Cultures programme and others built an evidence base for the role of advice in supporting New Zealand households to improve their homes, informing the development of practice and training resources.

Advice has often been embedded within wider initiatives rather than funded as a standalone service. Government retrofit programmes, from the Energy Saver Fund in the mid-1990s through to Warmer Kiwi Homes from 2018, incorporated advice as part of programme delivery and helped enable the growth of community-based advice initiatives. Health and regulation later became more explicit drivers through the Healthy Homes Initiative (from 2013) and the Healthy Homes Standards for rental properties (from 2019).

During this period, a range of dedicated services also emerged, including the Home Energy Advice Centre, Eco Design Advisor service, and EnergyMate. The establishment of the Support for Energy Education in Communities (SEEC) fund in 2020 marked the first dedicated central government funding mechanism for home energy advice and education, supporting further growth in the practice.

Relatively little evaluative research has examined home energy advice in this country, but the programme evaluations that exist consistently demonstrate that personalised advice increases

household knowledge, confidence and action. For example, evaluations of the Eco Design Advisor service have found that most respondents made changes as a result of the advice they received (e.g. Mohammadzadeh, n.d.). An evaluation of the Home Energy Advice Centre pilot found that almost all participants took at least one action, and two-thirds reported acting solely because of the advice (Walton et al., 2009). Evaluations of the EnergyMate programme (Kelly, 2021), and the Houses into Home evaluation (Aukaha, 2024) reported comparable results. The consistent finding is that advice is most effective when it is personalised, delivered by trusted advisors and integrated into wider interventions that address the physical condition of the home and other barriers to action.

A diffuse system rather than a bounded sector

A finding of this research is that home energy advice captures only part of a much broader system of people and organisations who provide energy-related information and advice to households (see section 7). Central to this system is a relatively small core of practitioners for whom home energy advice is a recognised function, most working across existing homes rather than new builds, and the majority delivering advice face to face at the client's property.

Based on a high-level population sizing exercise drawing on survey data, programme information, training records and stakeholder knowledge, the research estimated that this core workforce comprised approximately 150–200 practitioners in 2025. Surrounding this core is a much larger and more diffuse group of occasional advisors, product sales and service staff and customer-facing roles whose advice is more limited in scope, and among whom the distinctions between assessment and advice, sales and advice, and information and advice are frequently blurred.

Many of those who clearly influence household decisions do not regard themselves as providing advice at all. Builders, designers and tradespeople routinely suggest products and solutions to households they work for, placing them in a quasi-advisory position, yet the national building sector organisations consulted through this research did not regard advice as part of the tradesperson's role. A similar disconnect may have contributed to limited participation in the survey, as some groups the research team expected to hear from did not take part. The term home energy advice may not have corresponded to how some in the sector viewed their work and therefore they chose not to respond or did not view themselves as being the intended audience.

This diffuseness has direct consequences for consistency of advice. A household may receive advice from several sources with differing expertise and little alignment, and participants described a wider environment in which inaccurate, inconsistent or biased advice circulates from suppliers, tradespeople and other actors. The diffuse nature of the system also poses a clear challenge for any attempts to understand, train or coordinate amongst all the people who provide information, advice and quasi-advice to households.

Effective advice is relational and built on trust

One of the most consistently expressed themes across the interviews, and reinforced by the survey, was that effective home energy advice is fundamentally relational and dependent on trust. Participants described advice as depending on the advisor's ability to relate to the household, to listen, to demonstrate empathy, and to interpret the situation and adapt to it. One participant characterised effective advice as communication that is approximately ninety percent how a message is delivered and ten percent its content. This captures the sentiment of many participants. Trust was described as the factor that determines whether advice is accepted and acted upon, and as something that frequently develops over time through repeated engagements, in some cases across two or three visits, rather than through a single home visit.

This finding poses a challenge to the trend of digital and data-enabled delivery. The digital information landscape has expanded considerably, with government and industry organisations providing online tools, calculators and guides that households can use without an advisor, and some participants identified emerging opportunities in the use of smart meter data and platforms enabled by artificial intelligence. While some actors see considerable opportunitiy for these tools to support household decision-making, participants consistently framed these developments as complementing rather than replacing the need for personalised advice. Generic online information was also often seen as insufficient for people with limited digital literacy or access, older people, those for whom English is not a first language, and those navigating complex financial or technical decisions. The expectations of what can be achieved with digital tools may therefore require careful consideration.

Survey responses also showed that different advice providers address different household needs. Amongst our participants, not-for-profit and government practitioners advised primarily owner-occupier and renters, frequently face to face and often through referral from health or community organisations. This is likely to reflect the funded programmes under which these organisations frequently deliver advice. Commercial advisors tended to work more commonly with owner-occupiers, landlords and new-build clients and were more likely to deliver advice remotely. These differences may suggest that different households seek or require different forms of engagement, with some able to benefit from remote or self-directed advice while others need more personalised, relationship-based support delivered through trusted channels. The system currently possesses no explicit, shared logic for how these models should operate together, which means that households are routed to advice pathways largely by accident of geography, referral or programme eligibility.

Equity in this system is also a question of who delivers advice and who shapes it, not solely who receives it. Effective advice depends on trust and cultural fit, and this is likely to be of greatest significance for the Māori, Pasifika and migrant households more likely to be affected by cold, damp housing (Statistics New Zealand, 2020) and experiencing energy hardship. The survey found that almost all practitioners delivered advice in English, with a minority able to

deliver in te reo Māori and very few in other languages. Some participants identified a need for more advisors able to work effectively with Māori and Pasifika communities, and argued that in most cases these households will be best served by a Māori or Pasifika advisor. Participants also noted that non-Māori advisors can work effectively with Māori whānau where strong relationships and appropriate ways of working are in place, and that existing training was not always culturally appropriate. The concern extended beyond frontline delivery to leadership, with some participants arguing that initiatives intended to reach Māori and Pasifika communities should be shaped and led by those communities.

A capable but uneven workforce with no minimum standards

The research identified a small but highly capable core of advisors who combine formal training with considerable experience, although this capability does not extend evenly across the system. The Home Performance Advisor (HPA) training programme (see 3.6) appears to function as a de facto standard for this core group, with approximately two-thirds of survey respondents having completed HPA *Principles of Home Performance* and a smaller portion having completed HPA *Certificate of Home Performance*.[1] This de facto status is reinforced within some funded programmes (e.g. the Healthy Homes Initiative, where all frontline staff undertaking home visits are required to complete HPA '*Principles*' training). Capability in this core group extends beyond specific home energy advice training, with respondents drawing on professional experience in construction and property, lived experience of cold or unhealthy housing and other qualifications.

Beyond this core, there is considerable range in capability and training. There are no universal minimum training requirements for people providing home energy advice in Aotearoa. While some funders specify HPA training for the programmes they support, and some organisations set their own internal competency requirements, these operate at the level of individual programmes rather than the system as a whole. The absence of minimum training requirements was a source of concern for many participants, and the most acute concern related to Healthy Homes Standards assessment, which require no formal training or certification for assessors.

Even among trained and experienced practitioners, the research identified capability gaps in emerging areas, particularly advising people about electrifying their homes and in assisting households to weigh costs, benefits and payback periods. Practitioners named solar, the transition to electric technologies, and regular updates on new legislation among the training gaps they most wished to see addressed, and some participants added cultural sensitivity and de-escalation training to that list. Most advisors reported maintaining their knowledge largely

[1] Some participants referred to the *HPA Principles of Home Performance* as "Level 1" and the more advanced *HPA Certificate of Home Performance* course as "Level 2"

through self-directed study, meaning that their knowledge may not be keeping pace with the speed of technological change.

A further and more structural cause of capability gaps lies with the funding model. Because advice is so dependent on programme funding, advisors move into and out of the field as programmes are established, expanded or discontinued, and the experience and contextual knowledge they carry does not transfer when they leave. The system frequently loses capability as a result, which constrains what investment in workforce development can achieve in the absence of a more stable operating model.

Funding models shape delivery and sustainability

Home energy advice operates without a stable or clearly defined funding and delivery model and the research found no evidence that this is changing. Two broad modes of delivery appear to exist: home energy advice targeted at households with high needs and funded primarily by government, and commercially oriented services that rely on client fees or product-linked revenue. Neither operates within a secure framework. The bulk of home energy advice is structurally dependent on government decision-making, which leaves the system exposed to shifts in funding priorities.

This instability is not just a future risk, the effects are already being seen. For instance, the EnergyMate programme ceased operation during the period of this research and the Support for Energy Education in Communities funding rounds have progressively narrowed. Similarly the Eco Design Advisor network is now reduced to four member councils, with Auckland Council ceasing its service at the end of June 2026. Because these changes occurred across different funding streams and programme types, they suggest systemic pressure rather than a failure of any single model of advice.

Evolving drivers of home energy advice are not yet aligned

The research revealed a range of actors motivated by distinct and at times ostensibly competing priorities including household health, energy affordability, electrification and climate mitigation and adaptation.[2] These priorities are not always in conflict, but the funding streams, target audiences and delivery models attached to them are frequently siloed. This is significant, because households may receive advice shaped by very different motivations, and because resources directed to one priority could potentially be provided at the expense of another.

Community-focused and long-standing providers are generally oriented towards improving household health and wellbeing and responding to energy hardship, reflecting how the work

[2] In this report, *electrification* refers to the transition from fossil fuel-based energy use in homes to the use of electric technologies, including water / space heating and appliances as well as solar PV, batteries, and electric vehicles.

has historically been funded, through government programmes such as Warmer Kiwi Homes and the Healthy Homes Initiative. This is evident in the survey results, in which more than half of practitioners delivered advice under the Healthy Homes Initiative, and cold, internal moisture and energy efficiency were the most frequent reasons households sought support. Managers identified energy wellbeing and improved health as their organisations' leading reasons for providing advice, with reducing environmental impact featuring far less prominently. Households themselves generally seek advice to improve their health or reduce their energy costs rather than out of environmental concern, which shapes both what advisors are asked to provide and what they are funded to deliver.

However, our research suggests electrification is likely to reshape demand for advice and some participants raised equity concerns in relation to this. Newer advice providers and some system actors are more likely to focus on the opportunities associated with electrification, but advice in this space may benefit different households. Where the Healthy Homes Initiative and similar programmes have served lower-income whānau in poor-quality housing, electrification and climate mitigation and adaptation advice may be directed at more affluent or environmentally conscious households able to invest in solar. Electrification is increasingly advocated as a financial rather than an environmental investment, with Rewiring Aotearoa suggesting the average household would achieve substantial annual savings by electrifying.[3] Participants suggested a strong policy focus on electrification could have equity implications, with households unable to afford electrification potentially left behind if funding priorities shift, while also bearing a greater share of network costs. Participants also warned against unintended consequences such as poor investment electrifying a home that remains cold and damp because the thermal envelope was never addressed.

Our research suggests that climate adaptation and resilience could generate new demand for advice, particularly from the banking, insurance and local government sectors. Banks and insurers described growing concern about climate-related risks to households and the implications for lending, insurance and asset values, and local government participants connected this to their responsibilities under the National Adaptation Plan 2025. There were differing views as to whether these issues are best addressed at the household, community or structural level, but several participants recognised a role for household-level resilience advice, at least in some areas.

There are currently no dedicated providers of resilience-focused advice in New Zealand. This emerging interest represents a possible new source of demand and funding that sits largely outside the established health and affordability frame, and it reinforces the case for considering the system as a connected whole. The interconnection between these priorities is fundamental to effective advice: a well-insulated home is warmer, drier and less costly to heat, and interventions that serve one priority frequently serve others. Yet the funding streams and

[3] https://www.rewiring.nz/electrification-guides/get-started

delivery models attached to each have developed independently, so these connections are rarely made explicit to households or acted upon systematically. This indicates the potential value of a whole-of-house assessment model covering health, energy efficiency, electrification readiness and climate resilience as a single integrated intervention, rather than a series of smaller engagements determined by whichever funding stream a household happens to encounter.

The overall picture

Home energy advice is an established practice in Aotearoa and is delivered through a diverse range of programmes, organisations and practitioners. The research found substantial existing capability and a strong evidence base supporting the role of advice in helping households take action to improve their homes.

At the same time, this capability has developed in response to multiple drivers in an uncoordinated way. A wide range of self-guided information and tools, and advice models are in operation, but there is little evidence of a shared logic for how these should complement one another or which households are best served by different approaches. Likewise, the different drivers of home energy advice, including health, energy affordability, electrification and climate resilience, have frequently evolved through separate programmes, funding arrangements and stakeholder networks. While these interests often seek complementary outcomes, they are not widely understood as part of a connected system.

The findings suggest that the key challenge is not whether home energy advice has a role to play, but how existing capability, delivery models, funding arrangements and stakeholder interests can be better aligned to support household action. In a constrained funding environment, a clearer understanding of which forms of support are most appropriate for different households, and how different parts of the system contribute to shared outcomes, may help ensure that limited resources are targeted where they can have the greatest impact.

This report represents the first phase of a two-phase research programme. Subject to future investment and stakeholder interest, a second phase would build on these findings through a collaborative process to explore how existing capability, services, funding arrangements and delivery models could be better connected and supported to meet future needs.

1 Introduction

1.1 Home energy advice is an established practice

Home energy advice in Aotearoa New Zealand has developed over several decades in response to a combination of household need, research, government policy and practice. Concerns about cold, damp homes, energy affordability, sustainability, housing quality and, more recently, the energy transition and climate adaptation have all contributed to demand for services that support households to improve their homes. Home energy advice has emerged as one response to these challenges.

Internationally, home energy advice is a well-established practice delivered through a range of programmes, services and organisations. A substantial body of research has explored how and why advice influences household decision-making, with evidence suggesting that personalised advice is more effective than generic information, particularly when delivered by trusted sources and linked to practical support. These ideas are explored further in Section 2.2.

Today's home energy advice landscape in Aotearoa is built on these foundations. Over time, a diverse system of actors has emerged, which includes advice providers, delivery organisations, researchers, trainers, industry bodies, government agencies and commercial providers, using or supported by a range of programmes, tools and delivery models. While this system has developed significant capability, it has largely evolved incrementally and in response to changing needs and opportunities rather than through deliberate design. As the system has grown in size and diversity, questions have emerged about how different actors, programmes and delivery models interact, and whether the current configuration is well positioned to respond to current and emerging issues such as energy affordability, electrification, climate adaptation and resilience.

1.2 A growing landscape shaped by multiple drivers

Over the past 15 years, the home energy advice landscape in Aotearoa has become increasingly diverse. Alongside established home energy advice services, initiatives such as the Healthy Homes Initiative (HHI), Support for Energy Education in Communities (SEEC) programme, and Healthy Homes Standards (HHS) for rental properties have expanded the number and types of organisations involved in home energy advice. Alongside this initiatives relating to decarbonisation and electrification have further broadened the range of actors, services and delivery models operating in the system. These actors often operate with different objectives, funding mechanisms and delivery approaches.

This growth has created a larger and more fragmented home energy advice landscape. Many organisations now support household decision-making through different programmes, funding streams and delivery models. While these programmes often have distinct objectives, they may draw on similar approaches and, in some cases, the same practitioners. As a result, capability and activity can be distributed across multiple initiatives that are not recognised as being part of a wider system. This creates risks of duplication, inefficiencies, inconsistent messaging and missed opportunities for coordination. Much of the system has also developed in response to publicly funded initiatives and government programmes. As funding priorities and policy settings change, organisations may enter or leave the landscape, creating challenges for maintaining capability, capacity and institutional knowledge over time.

Despite the growing number of organisations and services involved in home energy advice, no comprehensive assessment of the landscape has previously been undertaken. While individual programmes and organisations are reasonably well understood, less is known about how they interact, where capability sits, how services complement or overlap with one another, and what implications this may have for the future provision of home energy advice. This research was undertaken to better understand the current home energy advice landscape in Aotearoa, including existing capability, services, delivery models, opportunities and challenges. It also explored the broader network of actors, relationships and influences that shape the provision of home energy advice.

1.3 How we define home energy advice

For the purposes of this research, we define home energy advice as:

> *personalised advice that helps people make homes healthier, more comfortable, cheaper to run, more resource efficient, or lower in environmental impact.*

This advice may be delivered in person, by phone or online; relate to existing or planned homes; and apply to renters, owner-occupiers or landlords. Advice may involve the use of assessment tools or methodologies and is distinct from the provision of generic information alone. It may be known by a variety of names such as home performance advice, Eco Design Advice or home energy coaching. Consistent with this definition, we primarily focused on services and practitioners with an explicit remit to provide such advice.

A key feature of this definition is the emphasis on personalisation. In this study, advice is understood as distinct from generic information because it is tailored to a household's circumstances and provides guidance or recommendations for action. However, the research also recognises that the boundaries between information, education, assessment and advice can be blurred in practice.

We adopted a deliberately broad definition because the research sought to capture the full range and diversity of home energy advice activity occurring in Aotearoa. Homes operate as

interconnected systems, and home energy advice can contribute to multiple outcomes including health, comfort, affordability, energy efficiency and environmental sustainability. Advice is also delivered through a wide range of programmes, organisations and professions that often have different objectives, funding arrangements and ways of describing their work. As discussed in the previous section, practitioners and organisations may be working towards different outcomes, or through different programmes, while drawing on similar capabilities and approaches. A narrower definition risked excluding activities, actors and capabilities that form part of this wider landscape. Using a broad definition enabled the research to capture organisations and practitioners who may not identify as part of a home energy advice system, but nevertheless play an important role in shaping household decisions about homes and energy.

1.4 Why we take a systems view

This research is primarily concerned with understanding the home energy advice landscape in Aotearoa, including the services, practitioners, organisations, opportunities and challenges that characterise it. However, the landscape does not operate in isolation. Home energy advice is shaped by a wider network of actors, relationships, funding arrangements, policies and tools that influence how advice is delivered and received.

For this reason, the research adopts a systems perspective alongside its focus on home energy advice. Taking a systems view enables consideration not only of individual programmes, organisations and practitioners, but also the connections between them. This is particularly important in a landscape where similar capabilities may be distributed across multiple initiatives, and where actors with shared interests or complementary functions do not always recognise themselves as part of a connected system.

Throughout this report, the term *system* is used to describe this broader network of actors, relationships and influences that shape the provision of home energy advice in Aotearoa.

1.5 Purpose and structure of this report

This research was conceived as the first phase of a two-phase initiative to support the future development of home energy advice in Aotearoa. Phase One aimed to develop a shared understanding of the current landscape, including the organisations, practitioners, services and delivery models involved in home energy advice, as well as the opportunities and challenges facing the sector.

By taking a systems perspective, the research also sought to understand the wider conditions shaping the provision of home energy advice, including how capability is distributed across the landscape, how different actors and initiatives interact, and where opportunities may exist for greater coordination and alignment. Establishing this evidence base is an important precursor to future sector development.

Subject to future investment and stakeholder interest, a second phase of work is intended to build on these findings through a collaborative process with stakeholders. The aim would be to explore options for strengthening the home energy advice system and to co-design and prototype approaches to its future development. Rather than assuming a particular model or solution, Phase Two would draw on the evidence generated through this research to identify practical opportunities to improve coordination, capability and long-term effectiveness across the sector.

The report is structured as follows. Sections 2 and 3 review relevant literature and describe how home energy advice has developed in Aotearoa. Section 4 outlines the research purpose, questions and methods. Sections 5 and 6 present findings from the advice practitioner and manager surveys and stakeholder interviews. Section 7 describes the current home energy advice landscape, including information tools, advice providers, frameworks, programmes and training. Section 8 discusses the main themes emerging across the research, including the structure of the system, workforce capability, funding, delivery models, cultural capability and emerging drivers of demand. The final sections bring together the conclusions and potential next steps.

2 Understanding Home Energy Advice

2.1 Defining home energy advice

Despite a growing body of research on home energy advice, relatively few authors provide an explicit definition of the concept. In a comprehensive review of the literature, Warren and Foulds (2020) observe that no widely accepted definition of energy advice is in common use and adopt Darby's (2003) definition: “advice specific to householders’ circumstances, with one or more of the following aims: achieving affordable warmth, improving energy efficiency, and reducing carbon emissions” (p.8). Bouzarovski et al. (2025) understand home energy advice as “an institutionalized form of domestic assistance aimed at improving domestic energy efficiency, conserving energy use, increasing social inclusion, and reducing carbon emissions” (2025, p. 2). The authors focus their research on formal advice provision but note that advice may also be provided through informal means, including in relation to sales and service. Similarly, Ambrose et al. (2019), note a similar distinction and adopt a “looser” (p. 2) approach by incorporating both types in their study. This distinction has relevance to the local context where there is limited funded independent advice.

While definitions vary, several common themes can be identified across this literature. First, home energy advice is typically described as advice tailored to the circumstances of a particular household. Darby's definition, for example, refers to advice specific to householders' circumstances. Second, several authors distinguish home energy advice from information provision alone. Darby (2003) characterises advice as a process of learning and sense-making that helps householders understand and manage energy use, while Warren and Foulds (2020) identify a broad consensus across the literature that information alone is often insufficient to support action. Third, definitions and descriptions of advice encompass a range of intended outcomes. These include affordable warmth, energy efficiency, energy conservation and emissions reduction, as well as affordability, alleviating energy hardship, home energy improvements and access to energy services. Finally, home energy advice is not tied to a single delivery model. The literature describes advice delivered through home visits, telephone services, written reports, websites, community-based services and digital platforms (Ambrose et al., 2019; Bouzarovski et al., 2025; Warren & Foulds, 2020).

Together, this literature suggests that home energy advice is best understood as personalised support that enables households to make informed decisions about their homes, energy use and related investments. However, there is no universally accepted definition, and the scope of advice varies between jurisdictions, programmes and authors. Questions remain about the outcome advice seeks to achieve, the activities that sit within its boundaries, and the distinction between advice, information, education and assessment.

For this reason, it was necessary to adopt a working definition of home energy advice suitable to the Aotearoa context for this research. The following section explains the definition used to establish the scope of the study and guide data collection and analysis.

2.1.1 Our definition of home energy advice

At the outset of this project, we established a definition of advice to set the scope of our research. An intentionally broad definition was adopted that took account of a wide range of outcomes that may be achieved through effective advice. Similarly, our definition intentionally encompassed advice provided in existing and new homes.

The reason for taking a broad definition was an assumption at the outset that there may be intersections between the subject matter, practitioners, delivery organisations, stakeholders and recipients of advice that fit within the boundaries of our definition, and taking a broad view would enable us to understand the scope and scale of the home energy advice system and opportunities for greater alignment and efficiency. The definition of home energy advice used in this research is:

> *Personalised advice to help people make homes healthier, more comfortable, cheaper to run, more resource efficient, or have a lower environmental impact. It may:*
>
> - *cover all or some of these areas*
> - *be delivered in person, by phone, or online*
> - *relate to existing or planned homes - including those lived in by tenants or owners, and landlords*
> - *involve various assessment tools / methods*
> - *be known by various names: Healthy Homes Advice, Home Performance Advice, Eco Design Advice, Energy Education etc.*

Fundamentally, we are interested in advice that has the potential to enable households to make changes that result in health, social and/or environmental benefits, broadly defined, for the occupant or wider society.

Home Energy Advice is personalised and distinct from information

A key feature of this definition is the emphasis on personalisation. In this study, advice is understood as distinct from general information or education in that it is tailored to a household's circumstances and provides guidance or recommendations for action.

In practice, however, the boundaries between information, education, and advice may be blurred. Advances in technology also mean that households may receive a form of

personalised, solution-focused guidance through online tools or AI-enabled services, without interacting directly with an advisor. For this reason, we treat advice as part of a continuum, ranging from generic information through to highly tailored, solutions-focused support.

Practitioners have a remit to provide advice but advice also comes from other places

Our research focused primarily on advice delivered by practitioners who have a remit to provide advice, recognising that this is where most structured and intentional services sit. Within this group, there is significant diversity in roles, organisational settings, training, and approaches. Some practitioners specialise in energy advice, while others incorporate it into broader roles such as housing assessments, health interventions, or community services. We also acknowledge that households also receive advice from other trades and professionals they interact with and advice may be associated with sales and services and it may not be independent or without bias.

Modes of delivery and assessments

Advice is also delivered using a range of methods, including in-home visits, phone, or online consultations, and may or may not be integrated with physical assessments of the home. We note that there may be a blurry line between assessment and advice, and the two are frequently delivered together. Assessment involves evaluating a home using a checklist, inspection, rating system, or more sophisticated modelling tool to identify issues and opportunities for improvement. Advice builds on this by interpreting those findings in the context of a household's circumstances and providing recommendations or priorities for action. Assessment can occur without advice - for example, where the purpose is compliance checking or certification - whereas effective advice will often draw on some form of assessment to understand the home and identify what matters most for the household.

2.2 How home energy advice supports households

2.2.1 Home energy advice is an established practice internationally

Home energy advice is a well-established approach for supporting households to improve outcomes from their homes. It is not an end in itself, it is an enabling intervention. There are many international examples where it has been used to help households reduce energy costs, improve thermal comfort and health outcomes, undertake home improvements, and navigate decisions about energy use and housing.

In the United Kingdom, home energy advice has been delivered for several decades, mostly by a range of non-government organisations, often with a strong focus on reducing fuel poverty and improving energy efficiency (Warren & Foulds, 2020). One of the most prominent examples is the Energy Saving Trust (EST), established in 1992, which has supported households through nationally coordinated but locally delivered advice services. Under this model, local organisations deliver advice through channels such as home visits, telephone

services, community programmes, and online tools, while EST provided coordination, technical expertise, and support (Ambrose et al., 2019). More recently, home energy advice has attracted renewed policy and research attention. Research in the United Kingdom (UK) has highlighted a highly networked but fragmented advice landscape (Bouzarovski et al., 2025), while recent policy initiatives have recognised the importance of trusted, independent advice in helping households navigate energy efficiency improvements and the uptake of low-carbon technologies. In 2022, the UK Government committed to establishing a comprehensive home energy advice service for England (Energy Saving Trust, 2023) although it is uncertain whether this commitment was implemented.

Home energy advice is also well-established in Europe. The European Union has increasingly recognised the importance of personalised energy advice as part of its energy efficiency and energy poverty policy framework. The recast Energy Efficiency Directive (EU 2023/1791) requires Member States to provide information and awareness-raising activities for consumers and to establish 'one-stop shops' or similar mechanisms that provide advice and support to households, particularly those affected by energy poverty. These services are intended to support household energy renovations, efficient heating, renewable energy uptake and energy-related decision-making.

Closer to home, a number of Australian state and territory governments have established advice services that support household energy efficiency, electrification and retrofit decisions. The Australian Capital Territory (ACT) Government's Sustainable Home Advice Program is a notable example, providing tailored home energy advice, home visits, workshops and helpline support through a publicly funded 'one-stop shop' model.[4] More broadly, Australian policy increasingly emphasises one-stop-shop approaches and advisory services to help households navigate retrofit, electrification and access to government support

Together, these examples demonstrate that home energy advice is an established practice that has been supported by governments, researchers, and community organisations internationally for several decades. While specific objectives vary between jurisdictions, common goals include alleviating energy poverty, improving housing quality, supporting energy efficiency and retrofit activity, and enabling the transition to lower-carbon homes and energy systems.

2.2.2 Home energy advice and theories of change

A substantial body of research has sought to explain how and why households make decisions about energy use, home improvements, and technology adoption. Theoretical approaches range from macro-level perspectives that examine socio-technical transitions and system change, such as Geel's Multi-Level Perspective (Geels, 2011; Geels et al., 2017) through to models that focus on household decision-making and individual behaviour within the home.

[4] https://www.climatechoices.act.gov.au/policy-programs/sustainable-home-advice-program

Behaviour change frameworks are particularly useful for understanding the role of home energy advice. Michie's COM-B model and Behaviour Change Wheel conceptualise an individual's behaviour as a function of capability, opportunity, and motivation (Michie et al., 2011). From this perspective, home energy advice can support behaviour change in several ways, including improving household knowledge and skills, increasing awareness of opportunities and options, and strengthening motivation to act. Importantly, the COM-B model suggests that information alone is unlikely to be sufficient to drive behaviour change. Rather, advice is most effective when combined with other supporting interventions, such as financial assistance, access to products and services, regulatory requirements, or social support. This aligns with approaches where home energy advice is delivered alongside retrofit programmes, subsidies, health interventions, and community-based initiatives.

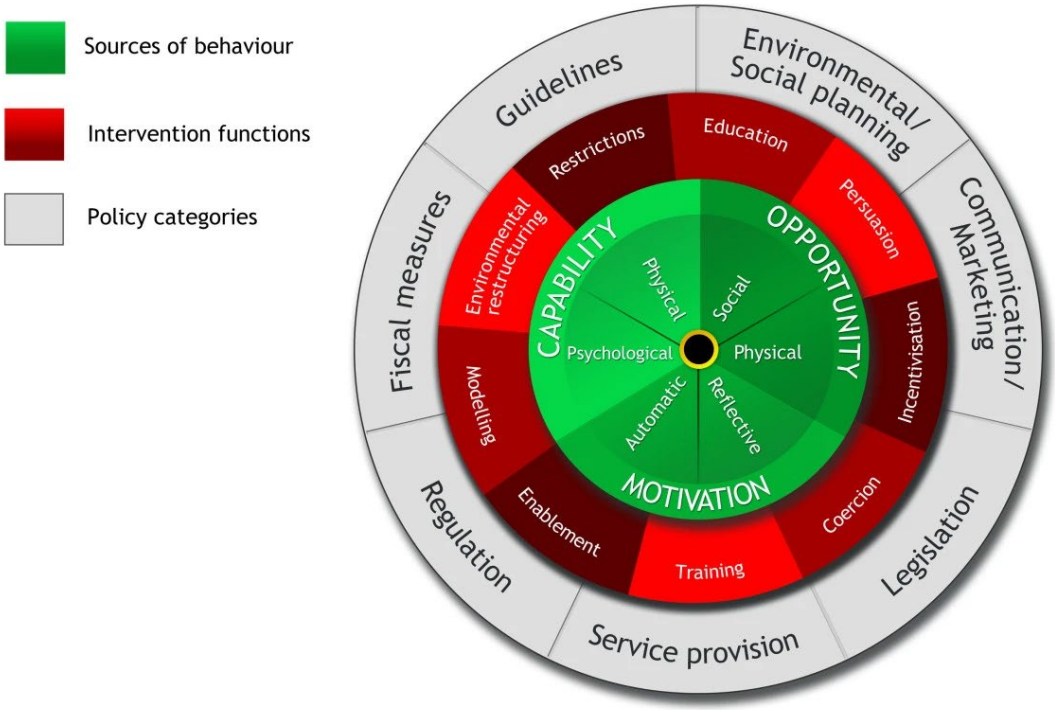


Figure 1 Behaviour change wheel. Source Michie, Van Stralen, & West (2011)

The Energy Cultures framework provides another useful lens through which to understand home energy advice. Developed and applied in Aotearoa, the framework conceptualises household energy use as the result of dynamic interactions between material culture (e.g. housing condition), practices (e.g. heating behaviour) and norms (e.g. expectation of indoor temperatures), all of which are influenced by wider social, economic, and institutional contexts (Stephenson et al 2010). The framework highlights that decisions about housing and energy are rarely driven by information alone but are shaped by a complex mix of household circumstances and external influences and how they interact.

Both the COM-B and Energy Cultures models emphasise that household energy decision making is complex, dynamic and situated within a broader context, reflecting that 'information deficit' models that assume rational action in light of better information, are unhelpful (Shove, 2010).

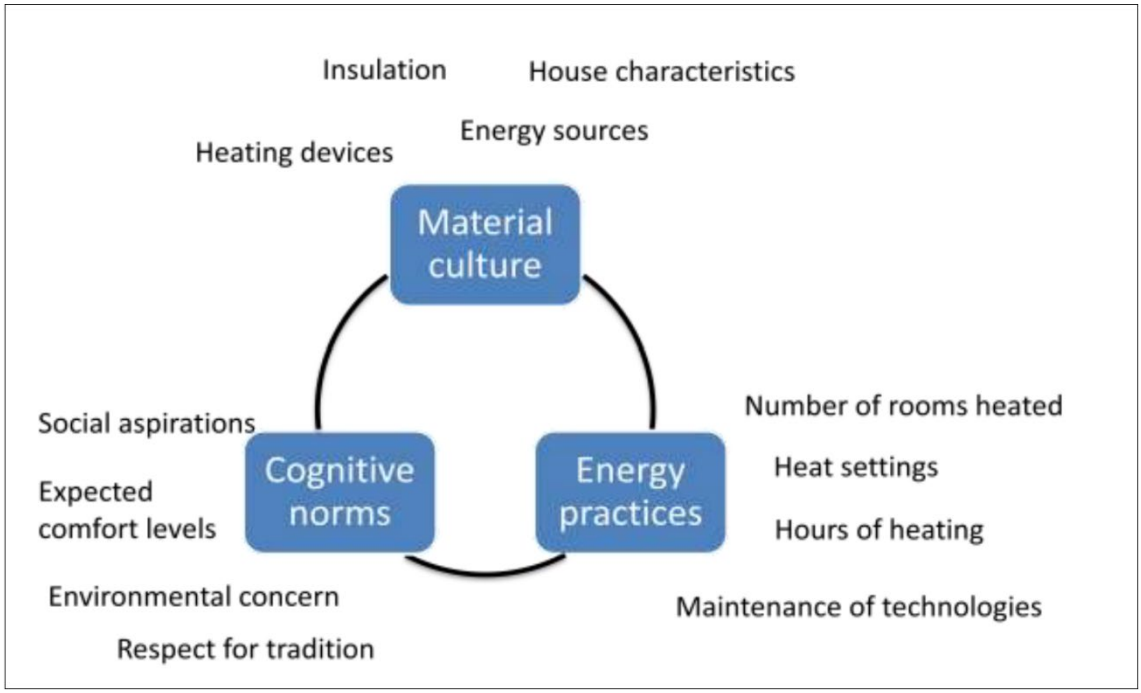


Figure 2 Energy Cultures Framework used to characterise some heating behaviours (Source: Stephenson et al 2010)

Together, these theoretical perspectives help explain why home energy advice can be valuable. Rather than simply transferring information, effective advice can help households understand options, navigate complexity, connect with other services and overcome barriers to action, and make decisions that are appropriate to their circumstances.

2.2.3 What makes home energy advice effective?

Recent reviews have examined the evidence base for home energy advice and sought to identify the factors associated with successful outcomes. Drawing on a review of energy-related social science literature, Warren and Foulds (2020) argue that home energy advice can be effective, but its impact depends strongly on how the advice is designed, delivered and supported. They conclude that the effectiveness of home energy advice is shaped by three interrelated dimensions:

- content
- source, and
- process.

Advice is more effective when messages are personalised to household circumstances and framed around what matters most to householders, including comfort and health, rather than relying solely on financial or environmental motivations. Effectiveness is also influenced by who provides advice, with trustworthiness and expertise identified as distinct but equally important characteristics of advisors. Finally, the process through which advice is delivered, including interaction, feedback, community engagement and integration with wider policy and service delivery systems, is critical to achieving good outcomes. The report concludes that energy advice is most effective when delivered as part of a wider system of support that helps households navigate decisions and take action.

3 The evolution of home energy advice in Aotearoa

Home energy advice in Aotearoa has developed over several decades and has been informed by, and responded to, a body of housing-related research, evolving policy priorities and programmes, regulation, and household needs. It has not emerged as a coordinated service or profession. This section traces the evolution of distinct home energy advice services and introduces key services and programmes. A discussion of the home energy advice landscape, that emerged from the research can be found in Section 7 and in Appendix B.

3.1 Research supports the need for informed household decision-making

During the mid – 2000s – late 2010s a substantial body of research brought increased attention to healthy and sustainable homes, including the role of householder decision-making and formed a strong evidence base supporting the rationale for advice, the development of advisor practice and training resources.

For example, outputs from the Beacon research consortium helped shift the housing sector towards more sustainable homes (Newton & Hawke, 2010). Beacon projects such as the Papakowhai Renovations (Easton, 2006), HomeSmart Renovations (Easton, 2010) and the High Standard of Sustainability (Easton & Howell, 2010) demonstrated pathways for improving existing homes, supporting homeowner decision-making, and establishing benchmarks for new-build sustainability. In parallel, BRANZ's research on healthy homes, and sustainable and low-carbon homes, also strengthened the evidence base. Of particular note are three major programmes undertaken over a 30-year period. Namely, the House Condition Survey (1994-2015-201), the Home Energy End-use Project (HEEP) (1995-2005), the Pilot Housing Survey (2018-2019), and HEEP2 (2021-2024). This work highlighted systemic issues with housing quality, particularly indoor temperature and moisture. While BRANZ longitudinal studies showed that most new homes performed poorly against the study's measure of 'sustainability' (Jaques & Sullivan, 2023)

At the same time, research from Otago University's Housing and Health research programme (now He Kāinga Oranga – Housing and Health) provided compelling evidence of the relationship between housing conditions and health outcomes (Howden-Chapman et al., 2023). This work went on to support the case for sustained government investment in housing improvement programmes including Warm Up New Zealand and later the Healthy Homes Initiative.

In complementary work, research from the Energy Cultures programme suggested that personalised home energy advice is more effective than community energy events at encouraging changes to households' material conditions, such as purchasing efficient

appliances or installing insulation, although community events play an important role in awareness raising and trust building (Stephenson et al., 2016).

Collectively, this body of research, provided a strong case that change was need to improve outcomes from our homes, and that home energy advice had a role to play in supporting these changes.

3.2 Advice embedded in delivery of retrofit programmes

Over the past two decades a series of policy changes have directly and indirectly shaped the demand and funding for home energy advice services.

Since 1995, government funding of retrofit programmes through the Energy Efficiency & Conservation Authority (EECA) has indirectly supported home energy advice. Beginning with the Energy Saver Fund (ESF), which operated from 1995 to 2000, government funding enabled community organisations and businesses to deliver retrofit measures. Subsequent programmes — including EnergyWise Home Grants, Warm Up New Zealand: Heat Smart (WuNZ), and Warmer Kiwi Homes — expanded the provider base to include commercial insulation and heating installers.

In 2009 the scale of government investment in retrofit activity increased substantially with WuNZ, which extended earlier subsidies to a wider population, including "general income" households. Alongside significant health benefits (Barnard et al., 2011) WuNZ contributed to increased workforce capacity and capability (Denne & Bond-Smith, 2011) expanding the number of practitioners engaging directly with households on energy efficiency decisions and indirectly supporting the development of home energy advice practice. From 2013, retrofit activity became focused on insulation for households with health risks under a revised Warm Up New Zealand: Healthy Homes programme. From 2018, the focus of funded retrofit activities were narrowed to lower income homeowners under the Warmer Kiwi Homes programme.

Across these programmes, advice has been embedded within retrofit delivery — supporting assessment, installation decisions, and behaviour change — rather than funded as a standalone service. Although EECA recognised early that effective delivery models combined advice, product selection, installation, and financing (Energy Efficiency and Conservation Authority, 1996), home energy advice itself was not defined or funded as a distinct output.

3.3 Health policy, rental standards and responses to energy hardship

3.3.1 Healthy Homes Initiative

From 2013 health became a more explicit driver of advice-related activity. The HHI - established in Auckland in December 2013 as part of the Rheumatic Fever Prevention Programme - was expanded to other districts with a high incidence of rheumatic fever in 2015. Over time HHI has become a significant contributor to the home energy advice landscape due to the ongoing funding for advisors and advisor capability. See Case Study 4.

3.3.2 Healthy Homes Rental Standards (HHS)

From 2019, regulation created a new set of assessment and compliance roles that overlap with home energy advice. The introduction of the Healthy Homes Standards for rentals (HHS) in 2019 has added a regulatory dimension to the delivery of home energy advice. The standards establish minimum requirements for rental properties, covering heating, insulation, ventilation, moisture control, and draught stopping, with full compliance required from July 2025.

These requirements led to widespread assessment activity across the rental sector, as landlords are required to assess and document the compliance status of their properties. This activity is undertaken by a range of actors, including property managers, private assessors, and building professionals, as well as landlords themselves. In some cases, these roles overlap with existing advice providers, and the process of assessing compliance may involve explaining requirements and identifying potential improvements.

3.3.3 Support for Energy Education in Communities (SEEC)

From 2020, responses to energy hardship created more direct funding for advice and education services. The introduction of the Support for Energy Education in Communities (SEEC) provided the first dedicated funding mechanism for home energy advice and education. Early funding rounds supported a wide range of community-based initiatives with differing delivery models, including in-home advice, outreach, workshops, and education activities. An evaluation of SEEC (Martin Jenkins, 2024) found that personalised advice can improve household knowledge, behaviours, comfort and wellbeing, particularly when combined with practical assistance, referrals and follow-up support.

Subsequent funding rounds have placed greater emphasis on targeted, in-home advice services, alongside more clearly defined capability requirements, including expectations around training and delivery. This has influenced both the form of service delivery and the range of participating providers, with a shift toward fewer, more established organisations delivering standardised services at scale.

3.4 Home energy advice and new builds

Most policy and regulatory changes that have affected home energy advice over the past two decades have occurred in relation to existing homes. However, using our definition of home energy advice, advice provided to people building new homes also forms part of the wider system. Because new build requirements are controlled by the Building Act 2004 and associated regulations, there is generally less demand for home energy advice related to new builds, except where homeowners want to exceed minimum regulatory requirements or have specific sustainability objectives.

One exception to this is the inclusion of an initiative under action 12.1.2 *Spark and foster innovation across the sector* in the first Emissions Reduction Plan (ERP) to "Establish independent household advice, such as expanding the Eco Design Advisor service, and explore grants to support households to reduce their carbon impact" (Ministry for the Environment, 2022, p. 232). Despite its inclusion in the ERP, no work was done to progress this activity and no similar activity was included in the second Emissions Reduction Plan.

Although central government has undertaken relatively little policy work that directly affects the provision of home energy advice in relation to new builds, other policy work shaped the emerging home energy advice system. For instance, EECA's work to develop of a mandatory Home Energy Rating Scheme (HERS) (East Harbour Management & Centre for Research, Evaluation and Social Assessment, 2007) although not implemented, informed subsequent work to develop voluntary assessment tools.

A range of tools and frameworks support household decision-making and practitioner activity in new builds. The New Zealand Green Building Council (NZGBC) has developed tools such as Homestar (for new builds and renovation) and HomeFit (existing homes), which provide structured approaches to assessing and improving home performance.[5] Passive House Institute New Zealand and the Superhome Movement have also developed guides for industry professionals and householders renovating or building new homes.[6,7] These tools provide a pathway from self-directed assessment through to more detailed, practitioner-led advice and support consistency in how home performance is assessed and communicated.

3.5 Development of distinct home energy advice services

Against this backdrop, distinct home energy advice services have emerged in Aotearoa, supporting people both living in existing homes and building new homes. The examples provided below are significant initiatives with national scale, which moved workforce capability and capacity forward. Other initiatives, such as those supported by HHI and SEEC

[5] https://nzgbc.org.nz/
[6] https://passivehouse.nz/
[7] https://www.superhome.co.nz/

(discussed above) have also contributed to workforce capability. For a discussion of the range of services we found through our research see section 7 and Appendix B.

3.5.1 Eco Design Advisors

The EDA service, initiated by BRANZ in 2006 with support from the Foundation for Research, Science and Technology, local government, and the Ministry for the Environment, was one of the first nationally coordinated advice initiatives. Initially focused on new builds, the service responded to research by Christie and Stoeklein (2005), which identified a lack of information and resources for new homebuilders to make sustainability-related decisions. Embedded within local councils and connected to BRANZ's scientific expertise, the service enabled the transfer of research and best practice to households while providing free, independent, personalised 'eco design' (energy, water, thermal and ventilation) advice.

Early evaluations of the Eco Design Advisor (EDA) service found it encouraged homeowners and designers to incorporate sustainability features into new builds and increased awareness of environmental issues (Jaques & Easton, 2010). Subsequent customer surveys found that 88% of respondents had made changes as a result of the advice received, most commonly installing curtains, blinds or insulation (Mohammadza, 2015). Established as a three-council pilot, it expanded to around 12 councils at its peak, though numbers have varied over time and national coverage was not achieved. Despite this, the service has played an important role in building practitioner capability and raising public and industry awareness of home performance over the past two decades.

3.5.2 Home Energy Advice Centre

Another example of early efforts to create a coordinated, national approach was the Home Energy Advice Centre (HEAC) model. Developed in 2007 by the Energy Efficiency Community Network[8], the HEAC sought to establish a coordinated national energy advice service combining phone-based and in-home support provided by community organisations in Auckland (EcoMatters), Wellington (Sustainability Trust) and Christchurch (Community Energy Action). An evaluation of the Energy Efficiency Community Network's Home Energy Advice Centre found that 94% of participants took at least one action following advice received, with two-thirds reporting they acted solely because of the advice (Walton et al., 2009). The evaluation also found that advice increased participants' confidence to make changes. The national model was not sustained beyond pilot funding; however, advice capability was maintained within the three delivery organisations and training resources developed to support the initiative - including a technical manual - were later incorporated into sector-led training resources (see Section 3.6 below).

[8] The Energy Efficiency Community Network later became Community Energy Network Inc.

3.5.3 *EnergyMate*

More recently, the EnergyMate programme run by the Electricity Retailers and Generators Association of New Zealand (ERGANZ) provided an example of advice delivery developed through collaboration between electricity retailers, lines companies, community organisations, and government. The delivery model combined basic healthy homes advice with financial mentoring provided by trained EnergyMate coaches acting as a bridge between households and their electricity provider. It operated across multiple regions and contributed to a cohort of advisors with defined minimum training requirements but did not achieve full national coverage before funding was discontinued in 2025. Evaluations of EnergyMate showed the value of the approach. For instance, an evaluation by Kelly (2021) found that 90% of households rated the advice as very helpful and 85% implemented some or all recommended actions within eight weeks

3.6 Home energy advisor training

Another development during this period that has supported the development and delivery of home energy advice is the advent of targeted training for home energy advisors. This includes two broad types of training.

The first comprises training associated with specific assessment tools, frameworks and delivery models. NZGBC and Passive House Institute of New Zealand (PHINZ) both offer training for practitioners in the use of their tools. These programmes are designed to support the consistent application of particular assessment methods, standards and approaches.

The second comprises training intended to develop home energy advisors from a first-principles basis. The most prominent example in the survey and interview data is Home Performance Advisor (HPA) training.

Case Study 1: Home Performance Advisor Training Programme

The Home Performance Advisor (HPA) Training Programme offers training for home performance advisors and other practitioners who provide advice to households. The programme content is informed by research and practice relating to home performance and household advice. The programme was established in 2013 through a partnership between Beacon Pathway, Community Energy Network (CEN) and Toimata Foundation. In 2022, it became HPA Ltd, a not-for-profit limited liability company owned by Beacon and CEN.

The training pathway for advisors includes a one-day course *Principles of Home Performance*, which is a prerequisite for the three-day *Certificate of Home Performance* course. HPA's training programme also includes an online *Healthy Homes: making energy work for whānau* course was also developed for community, social and health workers who support households. Training has specified learning outcomes and is updated annually to reflect current research. Progression through the Advisor pathway is staged, with a prerequisite pass threshold at *Principles for Home Performance* required for

entry to the Certificate course . Certification assessment includes practical assignments, a home-based assessment and a final examination.

The programme reports that, by June 2026, more than 1,700 registrations had been recorded across HPA training. This includes 334 Certificate course registrations and 980 Principles course registrations. As certification participants are required to complete the principles course, these figures include overlap.

In recent years, HPA Ltd has introduced online professional development for certified advisors, delivering three lunchtime sessions in 2025. It also designed and delivered a Principles of New Build course for a volume builder following a request from the company's design manager.

Another training initiative developed during this period is the HEMI[9] programme developed by Awarua Synergy that delivers advisor training from a Kaupapa Māori perspective.[10]

[9] HEMI stands for Heating, Energy, Moisture and Insulation.
[10] https://awaruasynergy.co.nz/education/

4 How we approached the research

4.1 Research purpose and objectives

Home energy advice in Aotearoa has developed through a mix of programmes, services and policy initiatives led by a range of actors across the community, public and private sectors. Significant growth in the number of practitioners, services and stakeholder was observed from the mid-2010s, particularly through initiatives such as the HHI, SEEC-funded services, HHS assessments. While this increased the number of practitioners providing advice to households, it largely occurred in response to separate drivers rather than as part of a coordinated system.

Some of Beacon's recent work highlighted both the value of personalised advice and challenges within the current landscape. Research with ANZ (Blackwell et al., 2024) demonstrated the potential benefits of trusted home performance advice for households and commercial partners, but also raised questions about whether there was a sufficiently mature and reliable advice system to support widespread referrals. Other reviews and policy processes including the Electricity Price (New Zealand Government, 2019) and recommendations to the Minister from the Energy Hardship Expert Panel (Energy Hardship Expert Panel, 2023) similarly identified a need for stronger coordination and support for organisations providing advice, particularly to households experiencing energy hardship. At the same time, we observed signs of fragmentation, including duplicated effort, inconsistent messaging, uneven access to services, and limited visibility of home energy advice as a whole. There is no centralised list or register of home energy advisors or organisations that provide home energy advice, and little is known about the workforce.

This research was undertaken to develop a clearer understanding of the home energy advice landscape, including who was providing advice, how services were delivered and funded, and where opportunities and gaps existed. It was also intended to inform a second phase of work. By establishing an evidence base about the current system, this research (Phase 1) sought to provide the foundation for working with stakeholders and households to co-design and test a future operating model for home energy advice that builds on existing strengths while addressing the coordination, capability and system challenges identified through this research. Therefore, our research objective is articulated as:

> *To understand the Home Energy Advice landscape in Aotearoa in 2025 including key issues and opportunities, to inform future work to propose a sector operating model.*

4.2 Research questions

To achieve the research objective, we posed the following primary research question: *What is the Home Energy Advice landscape in Aotearoa in 2025?*

To describe the home energy advice landscape and highlight issues it is facing, how these might be responded to, and understand future needs / opportunities, we sought to understand the following:

1. The range and diversity of personalised advice available to New Zealand households (including scope of advice, approaches, frameworks, methodologies used etc.).
2. The objectives and drivers for advice providers and how advice provision is funded.
3. The range of skills, training and competencies of practitioners providing advice.
4. Which households' advice is targeted at and provided to.
5. Which actors have an interest in personalised advice to meet organisational objectives (advice provider organistation and other stakeholders) and any actions they are taking to support / enable advice provision.
6. Which actors may have an interest in advice in the future under certain conditions and what those conditioners would be?
7. Challenges, risks and issues facing practitioners and the sector as identified by practitioners, orgs, other stakeholders.
8. Emerging areas of need / demand for advice and what skills/ competencies might be needed for advisors, advice organisations and funders/ supporters to respond appropriately.

We anticipate that insights gathered in response to Qs 7 and 8 in phase one may need to be explored in more detail, and tested further, in phase two.

4.3 Methods

A mixed methods approach was used to develop a comprehensive understanding of the home energy advice landscape. Our primary research methods were two online surveys and two rounds of semi-structured interviews with stakeholders. Ethical approval for this research was received from the Aotearoa Research Ethics Committee (Approval 25_70).

In addition, we carried out desktop work including identifying system actors and scanning the information landscape. The approach to each of these, and results, are discussed in the sections below. We also undertook a literature review which is included in section 2 above.

4.3.1 Identifying system actors

In the project initiation phase the research team held a workshop in Wellington to identify system actors based on our definition of home energy advice. We were guided by the following question:

> *Which actors are significant to us to understand the home energy advice system in Aotearoa currently and where it is heading?*

The resulting system actor map is included in Appendix A for reference. We note that the map is a preliminary working document and our understanding of the system and key actors has evolved throughout the research. The system actor helped conceptualise the home energy advice landscapeand identify interview participants and networks to distribute the surveys.

The system actor map demonstrates the breadth of parties with a potential interest in home energy advice. Starting with households (advice recipients) in the centre we identified multiple layers of actors with a direct and indirect interest and / or influence on home energy advice.

- **households** – owner occupiers, renters and landlords in existing homes plus people building new homes, noting that these may have different advice needs and levels of agency and capacity to improve their homes
- **advice practitioners and delivery organisations** – these span community sector, central and local government and private sector actors. Some identify strongly as home energy advisors, and some may deliver advice tangentially to other functions
- **supporting organisations** – organisations that play a role in supporting the delivery of home energy advice and its outcomes including research, training, advocacy, funding, peer networks and social service providers
- **Funders, interested parties and other stakeholders** – the outer layer includes actors with a direct or indirect interest in home energy advice across the public, private, community and research sectors. For some home energy advice as we understand it is closely linked with their organisational objectives and for others the interest may be emerging or less clear.

4.3.2 Desktop review – household-facing information and advice

As noted in the discussion of our home energy advice definition above, information, education and advice operate on a continuum and often support one another. Therefore, to understand the home energy advice landscape we undertook a desktop review of sources of information and advice to explore the relationship between these parts of the system, to inform our survey and interview schedule design and our analysis of results. Our preliminary desktop review was submitted to BRANZ as a milestone deliverable and is not included here as it has been updated and is reflected in Section 6 and Appendix B.

4.3.3 Online Surveys

We conducted two online surveys using Survey Monkey to gather quantitative and qualitative data from people involved in delivering home energy advice.

The surveys were undertaken as exploratory market research to better understand the home energy advice workforce and the services currently operating in Aotearoa. This is the first known study of its kind and there is no central register of home energy advisors or reliable means of quantifying the overall population. Consequently, it was not possible to draw a representative sample or calculate a response rate. Participants were recruited through a range of sector networks and organisations, and the survey findings should therefore be considered indicative rather than representative of the home energy advice sector as a whole.

Survey design

The survey was designed to gather data about the following aspects of the research questions:

- the range and diversity of personalised advice available to New Zealand households (including scope of advice, approaches, frameworks, methodologies used etc.)
- the objectives and drivers for advice providers and how advice provision is funded
- the range of skills, training and competencies of practitioners providing advice
- which households' advice is targeted and provided to
- challenges, risks and issues facing practitioners
- emerging areas of need / demand for advice.

The surveys were designed to reach two types of participants:

- **practitioners** - people who give home energy advice
- **managers** - people who manage home energy advisors.

Practitioner survey

Questions for practitioners focussed on:

- practitioner characteristics
- where and how advice is provided (e.g. geographic location, in-home vs phone)
- programmes advice is provided under and frameworks and tools used by practitioners
- types of advice households need, advice provided and who receives advice
- referral pathways and follow-up with households
- competencies and training – current, on-going and desired
- perspectives on day-to-day challenges delivering advice
- perspectives on opportunities and emerging advice needs

Questions were mostly a mix of multi-choice and four- or five-point Likert scales (frequency and importance), with a small number of open-text responses. The practitioner survey can be found in Supporting Appendix 1 for reference.

Manager survey

The advisor manager survey was designed to reach people who manage home energy advisors. Their views do not necessarily reflect the views of the organisation they work for. Questions for managers focused on:

- organisational characteristic (e.g. size, operating model, location)
- number of advisors employed and significance of home energy advice to their organisation
- motivations for providing home energy advice
- programmes, funding and advice frameworks
- referral pathways, target market for advice and scale of delivery
- advisor competencies and training – current, on-going and desired
- perspectives on current and emerging advice needs
- perspectives on challenges and risks
- perspectives on opportunities.

Recruitment and sampling

Participants were recruited primarily through Beacon's existing networks. Key organisations were provided with recruitment information and asked to distribute the survey within their networks. Participants were offered the chance to enter a draw to win one of three $100 Prezzy Cards[11]. Following the draw participants names were deleted.

To broaden reach, the research team also:

- made direct contact with selected organisations not expected to be reached through existing channels
- approached industry bodies in related sectors (e.g. design, architecture, construction)
- promoted the survey via Beacon and BRANZ social media
- distributed a flyer with a QR code at the Ara Ake Energy Resilience and Affordability Conference (8–9 October 2025).

Survey distribution occurred through at least 20 sector organisations, with recruitment information estimated to have reached several hundred practitioners and an unknown number of organisations.

The survey was open from late August to late October 2025. The timeframe was extended to support participation, as the survey period coincided with winter (i.e. peak activity period) for

[11] Participant anonymity was protected by entering personal details into a separate webform that was not connected to the survey.

many practitioners. Reminder communications were issued through the same channels during this period. The manager survey can be found in Supporting Appendix 2 for reference.

4.3.4 Stakeholder Interviews

Semi-structured interviews were conducted with representatives from 24 organisations to provide qualitative insights into the Home Energy Advice system and complement findings from the online surveys.

4.3.4.1 Sample and recruitment

Participants were selected using purposive sampling, where participants are deliberately selected to ensure coverage of key roles, perspective and experiences relevant to the research question (Patton, 2015). A long list of participants was identified through stakeholder mapping and the research team's professional networks. Organisations were approached based on their relevance to the research questions, consistent with purposive sampling approaches that prioritise information rich cases (Ahmad & Wilkins, 2025). Interview participants were approached, either:

- because they had a *direct, established interest* in providing or supporting home energy advice (e.g. advisor training organisations, funders), or
- because they had an *indirect or emerging interest* in home energy advice (e.g. electricity suppliers, retail banks).

4.3.4.2 Interview method

A common interview framework was used, although questions were adapted in practice to reflect participants' level of engagement with home energy advice and their areas of interest or expertise. Consequently, two versions of the interview script were used; these can be found in Supporting Appendix 3. For example, interviews with *indirect and emerging* stakeholders were often more focused in scope, reflecting both the narrower relevance of the topic to these participants and a desire to respect participants' time. In these cases, interviews prioritised questions relating to emerging trends, challenges and opportunities, the potential role of home energy advice within participants' areas of interest, and the conditions required for that role to be realised. This approach is consistent with semi-structured qualitative methods, which allow flexibility to explore areas of greatest relevance to both the research questions and participants' expertise (DeJonckheere & Vaughn, 2019).

Interviews were focused on the following aspects of the research questions as relevant.

- organisational interest (current or emerging) in home energy advice
- perspectives on effectiveness of advice
- perspectives on practitioner competencies – current, ongoing and future needs

- perspective on risks, challenges, opportunities and trends facing the home energy advice system (direct interest)
- perspective on risk, challenges, opportunities and trends facing their organisation and the potential or future role of home energy advice in these.

Interviews typically lasted between 45 and 60 minutes and were conducted online with informed consent. Participant information (Supporting Appendix 4) was provided to participants ahead of the interviews and informed consent was recorded at the start of the interview. Interviews were recorded and transcribed, with transcripts reviewed for accuracy by the research team prior to analysis.

4.3.4.3 Analytical approach

The interview data were analysed using a hybrid thematic analysis approach (Proudfoot, 2022), drawing on Braun and Clarke (2006) to guide our process of coding and theme development. Our approach combined deductive coding based on the research questions and interview schedule ('top-down') with inductive ('bottom up') identification of themes emerging from participants' accounts (Braun & Clarke, 2006).This research made limited and transparent use of generative artificial intelligence (AI) tools, specifically Microsoft Copilot, to support aspects of data handling and analysis. AI was used to assist in preparing initial interview summaries, after transcripts were cleaned and reviewed by the research team, to help identify candidate themes for further review. All participants consented to this use.

An iterative coding process was used to refine the analytical framework, including team-based review of initial codes. This resulted in a set of themes organised under four broad categories:

- workforce capability and capacity
- system trends
- challenges and constraints
- system enablers and opportunities.

While themes reported in this section reflect patterns observed across multiple participants, not all participant accounts met the threshold to be represented as a theme. In some cases, particularly within the 'system enablers and opportunities' category, views raised by a smaller number of participants have been included where they provide useful signals of emerging ideas, potential system developments, or areas of interest. These are reported as indicative rather than strongly evidenced findings and should be interpreted accordingly.

4.3.5 Stakeholder engagement

In addition to the surveys and interviews outlined above we also conducted a small number of informal discussions with other stakehodlers. These discussions were used to test assumptions or validate results, and included building industry sector organisations, commercial heating and insulation providers and electricity sector stakeholders.

5 Online Survey Results

The survey results provide an initial picture of the characteristics, activities, and perspectives of home energy advisors and advisor managers in Aotearoa. Following data cleaning, we received 102 responses to the practitioner survey and 36 responses to the advisor manager survey.

Responses were concentrated among practitioners delivering funded advice services with relatively limited participation from those operating in new-build settings and working for commercial organisations. This may indicate that some practitioners did not identify with the framing of home energy advice used in the study, or that the survey was less relevant to those for whom advice forms only one part of a wider professional or commercial function. The results from each survey are discussed in turn below.

In the course of our analysis, we compared responses of participants from different organisation types (not-for-profit, central government, local government, self-employed and commercial). We observed that practitioners from not-for-profit, central and local government organisations had largely consistent responses across most questions, while commercial and self-employed advisor responses frequently differed from this segment and from each other. As the 'not-for-profit and central and local government' segment is two thirds (67%) of the total sample, these responses strongly influenced trends showing up in whole-sample analysis. For this reason, we have provided a separate analysis by organisation type in sections where the response patterns diverged. Where we have shared analysis at the whole-sample level, this is because there were no notable differences between cohorts.

5.1 Practitioner survey

5.1.1 Participant characteristics

Participant characteristics are shown in Table 1. Most respondents identified as Pākehā; almost a quarter identified as Māori and a fifth as Pasifika. Other ethnicities were also part of advisor identities – including European, South African and Asian.

Table 1: Participant characteristics: ethnicity, gender and age

Ethnicity[12]	71% Pakeha 23% Māori 12% Pasifika
Gender	53% Female 43% Male 4% Prefer not to say / another gender
Age	15% 60+ yrs 26% 51-60 yrs 33% 41-50 yrs 17% 31-40 yrs 8% 30 yrs or under

Overall, slightly more of the sample were female than male. Advisors of other genders or who preferred not to state their gender were a low proportion of the sample. When analysed by organisation type, advisors in not-for-profit and government organisations were more often female, while advisors in commercial organisations or self-employed were more often male.

Most respondents were aged over 40 and age distribution was similar across genders. When analysed by organisation type, respondents working in commercial organisations or self-employed (30% of total sample) tended to be older, with no respondents under 30 years in either of these categories.

5.1.2 Workplace settings

Over half of practitioner respondents worked for not-for-profit organisations, including social businesses.[13] Self-employed practitioners accounted for 19% of respondents and practitioners working in commercial organisations for 12%. Thirteen percent worked in local or central government. 'Local government' employees generally provided advice under the Eco Design Advisor framework. Those who said they were employed by a central government organisation were primarily people delivering the HHI programme. Across the whole sample, 21% worked for kaupapa Māori employers.

12 Respondents could select more than one ethnicity.

13 A social business is an organisation that operates using a commercial model but applies some or all of its profit to social purposes.

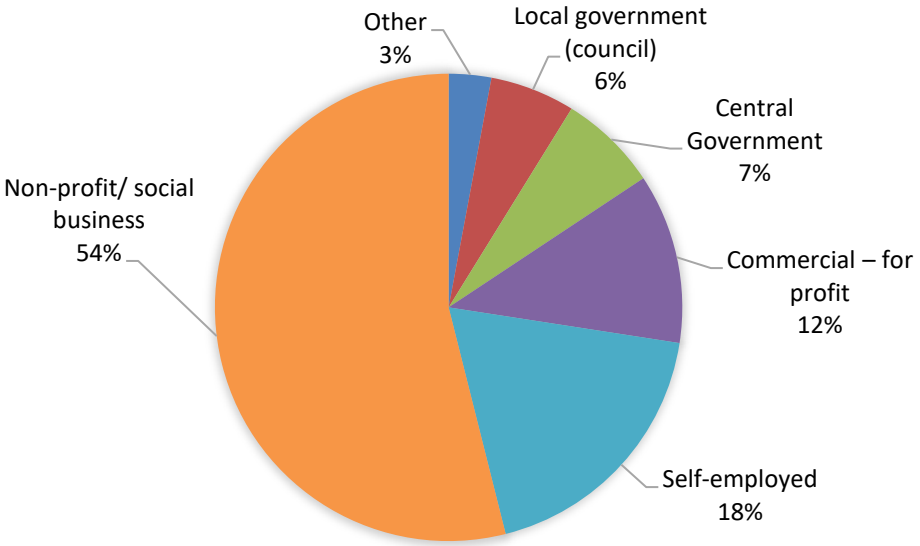


Figure 3: Employer organisation

Most respondents (81%) reported that providing home energy advice is not the sole function of their role. Advisors' other work included: broader social or health support (27%); commercial activity / sales (14%); and a management/admin/funding function (10%).

When asked about the number of one-to-one advice clients they saw in the last 12 months, 44% of practitioners said they had provided one-to-one advice to fewer than 50 clients, and 41% to between 51-200. This may be connected with the finding that for most respondents, advice is not the sole function of their role.

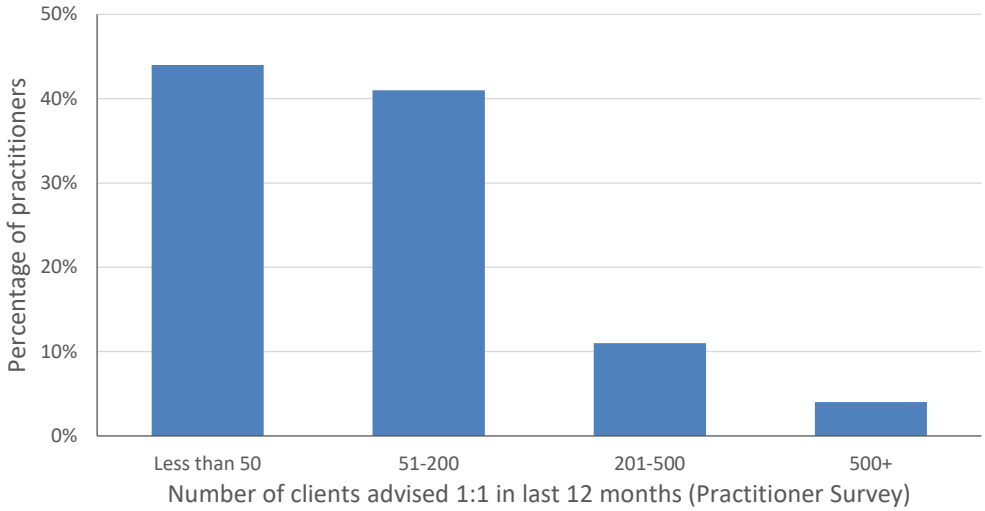


Figure 4: Number of clients advised 1:1 in last 12 months (Practitioner survey)

5.1.3 Geographic coverage

Practitioners were asked what geographic areas their advice service was available in. We have analysed this down to the territorial authority level.

Two practitioners said their advice covered the whole country, one covered the whole North Island and four covered the whole South Island. Such broad coverage may indicate that the advice provided was not face-to-face advice, or that face-to-face advice may be available only periodically (i.e. the advisor travels to these areas).

Areas where our respondent sample had limited coverage were Waikato south of Hamilton, Gisborne/Tairawhiti, the far south (Otago, Queenstown, Southland, Invercargill) and the northern tip of the South Island (Nelson, Tasman, Marlborough). Urban centres - Auckland, Hamilton, Wellington, Christchurch, Dunedin - had higher coverage.

Figure 5 provides a snapshot in time of the geographic coverage of advice delivered by advisors working for not-for-profit and government organisations.[14] This sub-sample is presented separately because responses from this cohort were broadly consistent across survey questions, suggesting it represents a relatively uniform type of advice. Therefore, the map indicates geographic coverage of a relatively consistent type of advice. It also comprises around two-thirds of the total sample.

The geographic distribution of this advice broadly reflects population density, although some locations appear to have lower levels of coverage than might be expected given their

[14] The survey was open August – October 2025

population size. These patterns provide a useful starting point for further investigation to determine whether they indicate genuinely under-served areas or simply reflect limitations of the sample. Note that darker shading on the map shows a higher number of advisors in the location on a scale where the lightest colour is 0 - 2 and the darkest shade is 9 – 11.

It should not be interpreted as a complete picture of home energy advice coverage, as it is based on a non-representative sample of providers at a point in time and excludes those reporting nationwide, North Island-wide or South Island-wide coverage, as well as commercial and self-employed practitioners.



Figure 5: Snapshot of geographic distribution of practitioner respondents working for not-for-profit and government organisation

5.1.4 Programmes and advice categories

Two thirds (66%) of practitioners said they provided advice under more than one programme or category. HHI was the programme that applied most widely, selected by nearly 60% of respondents, while roughly half (51%) provided advice related to the HHS and 24% in connection with Warmer Kiwi Homes (WKH).

A majority (79%) of those who provided advice under HHI also provided advice under other programmes. Other programmes or advice categories they worked with included a wide range, but particularly HHS and WKH.

When analysed by the type of organisation practitioners worked for, we saw differences in the mix of programmes delivered. Self-employed practitioners most frequently delivered advice related to HHS (13/19), though some also delivered advice under HHI (6/19) and a few under SEEC, EDA and 'other advice offering paid for by the client'.

A majority of practitioners in not-for-profit organisations or social businesses delivered advice under HHI (46/68), and almost half under HHS (29/68), with WKH (18/68), Energymate (14/68), SEEC (10/68) and other funded programme (11/68) also being selected by serveral of this cohort.

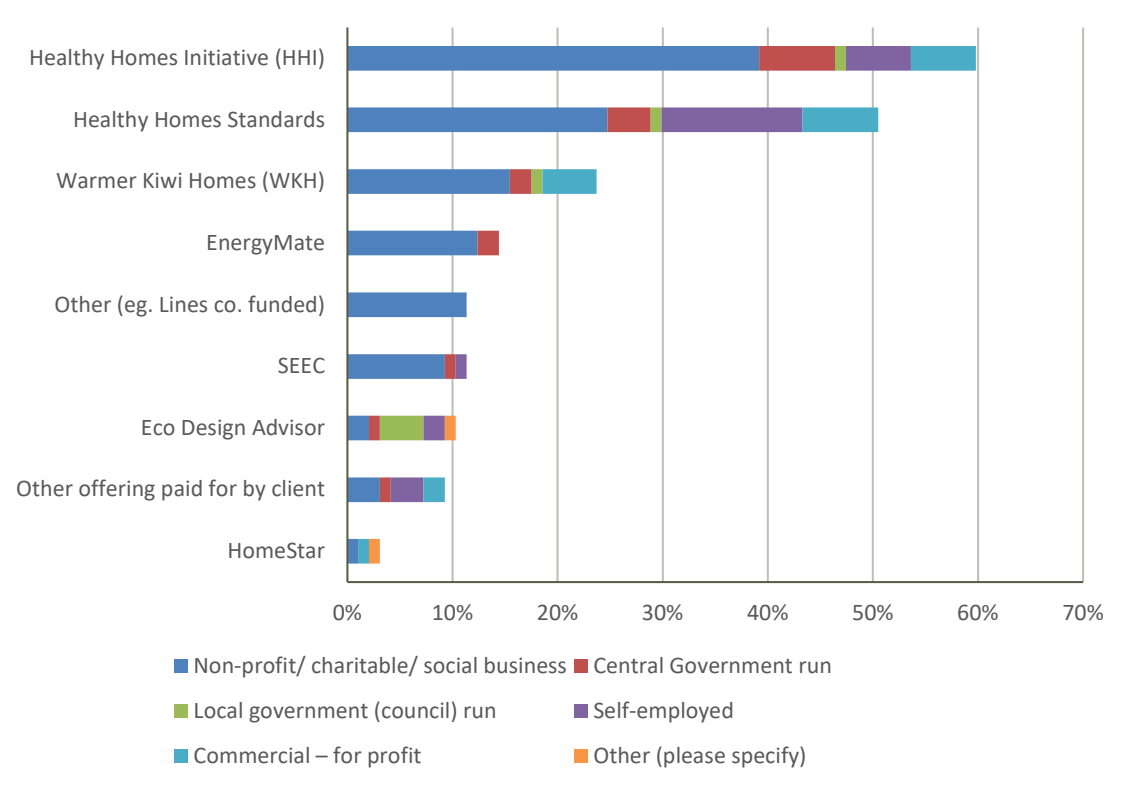


Figure 6: Percentage of respondents who delivered advice under different programmes or advice categories in the last 12 months

5.1.5 Inbound referral pathways for advice

Practitioners told us households were referred to them through a range of pathways. More than half said they had referrals via community agencies (excluding health providers) and half received referrals from health agencies or health providers (Figure 7). This is consistent with not-for-profit advice providers being the majority in our survey sample. Respondents also received referrals from energy providers (31%) and non-energy provider businesses (21%) and councils (15%). Other referrals were received from: property managers, universities, tradespeople (builders, electricians etc), councils.

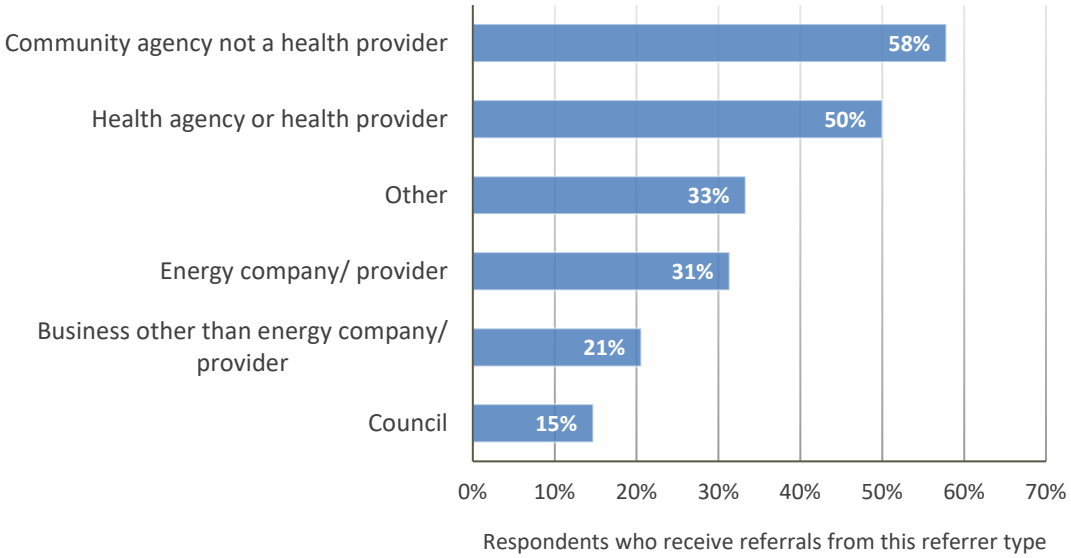


Figure 7: Source of inbound referrals for advice

5.1.6 Reasons people seek home energy advice

Overall, cold, moisture and energy efficiency were the most frequent needs/ concerns that people presented with, with specific building envelope issues, general behaviour change and housing-related illness also arising regularly for more than 60% of respondents. Environmental impact, the house being too warm (e.g. in summer), and climate change resilience arose frequently for less than 20% of our sample.

In 'other' reasons, 9% of respondents said clients presented with tenancy advocacy support needs to understand rights or navigate issues with a landlord. Other wider social concerns identified by respondents included general financial hardship, overcrowding, health and disability needs, and safety concerns.

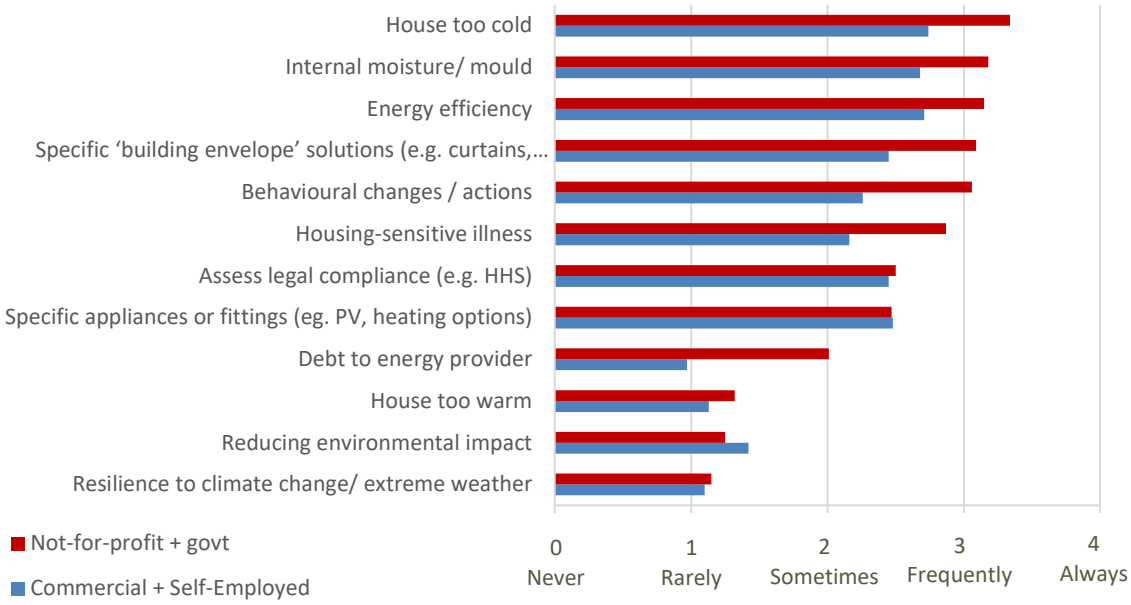


Figure 8: How often clients present with particular needs, concerns or questions by organisational type (weighted responses: 0-4 scale)

Analysis of responses about clients' presenting needs by organisation type (not-for-profit, governmental, commercial, self-employed) showed that not-for-profit and local and central government organisation advisors provided generally consistent responses. Therefore, they have been grouped together as 'not-for-profit and government' for the purposes of further analysis to compare them with commercial and self-employed advisors. Responses showed that the top three presenting needs / concerns were consistent across all advisor organisation types. These were:

- house too cold
- internal moisture/ condensation
- energy efficiency/ reducing energy costs.

The three *least* frequently presenting needs for not-for-profit and government organisation respondents were:

- reducing environmental impact
- house too warm
- climate change resilience.

These were also in the bottom four for commercial and self-employed respondents.

Not-for-profit and government advisors reported seeing a greater diversity of issues more frequently. Five out of 12 issues were reported with a weighted average over 3 and a further

three between 2.5 - 3.0 for this cohort. In contrast, weighted average frequencies for the commercial and self-employed cohort are consistently lower (except for 'reducing environmental impact' and 'specific appliances'). This could be related to differences in the way not-for-profit vs self-employed and commercial advice is targeted and funded.

What are weighted averages? A weighted average summarises survey responses into a single score, for example, on a scale of 0 to 4. It takes into account both the rating selected by respondents and the number of respondents who selected it, allowing results to be compared more easily across questions or groups. Higher scores indicate that responses were generally rated more highly by survey participants.

5.1.7 Advice provided to households

The advice / solutions offered by advisors mirrored the needs people presented with, with moisture control, heating, insulation (including curtains) and ventilation the top 'solutions'. Not-for-profit and government practitioners were more likely that commercial and self-employed advisors to include effective curtains and behaviour change as solutions in their advice, while commercial and self-employed advisors more frequently offered energy bill/ tariff focused solutions. This may reflect the types of advice that is funded.

In 'other' responses, 7 out of 30 relevant responses highlighted that their advice focused on cost-effectiveness/ low-budget/ budget-friendly solutions or options.[15] It is notable that window glazing as a solution offered was a relatively low frequency compared with other (likely less costly) 'envelope' solutions such as insulation, curtains, behaviour change, draught-proofing, ventilation. This is consistent with responses in other parts of the survey that emphasised cost-sensitivity of solutions as an important consideration.

[15] Responses that said 'nothing/ no other solutions' were not included (i.e. not 'relevant').

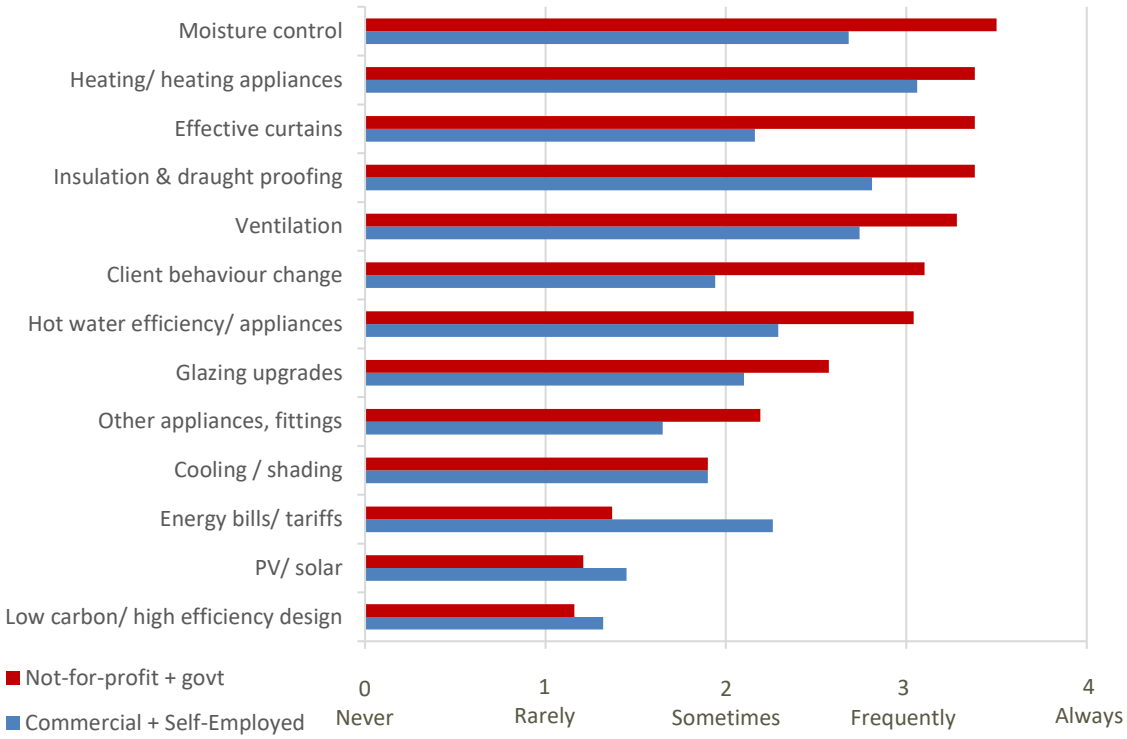


Figure 9: How often different solutions and advice were offered by practitioners (weighted responses: 0-4 scale)

5.1.8 How practitioners provide advice

Almost all practitioners had provided advice in English in the past year (99%), while 12% had provided advice in Māori and under 5% had provided advice in 'other' languages.[16] Three respondents also pointed out that interpreters were used to provide advice in languages not spoken by the practitioner, meaning that advice may be provided in a wider variety of languages than those reported.

By far the most common way of providing advice was onsite at the property that the advice related to - with 67% saying they 'always' or 'frequently' provide advice this way. Providing advice via phone, email or in their office/work premises were the second most common methods. Advice provision in another public space, online and via video call were uncommon.

[16] Samoan, Tongan, Chinese, NZ Sign Language, Hindi, French, Arabic and other Middle Eastern or African languages (not specified).

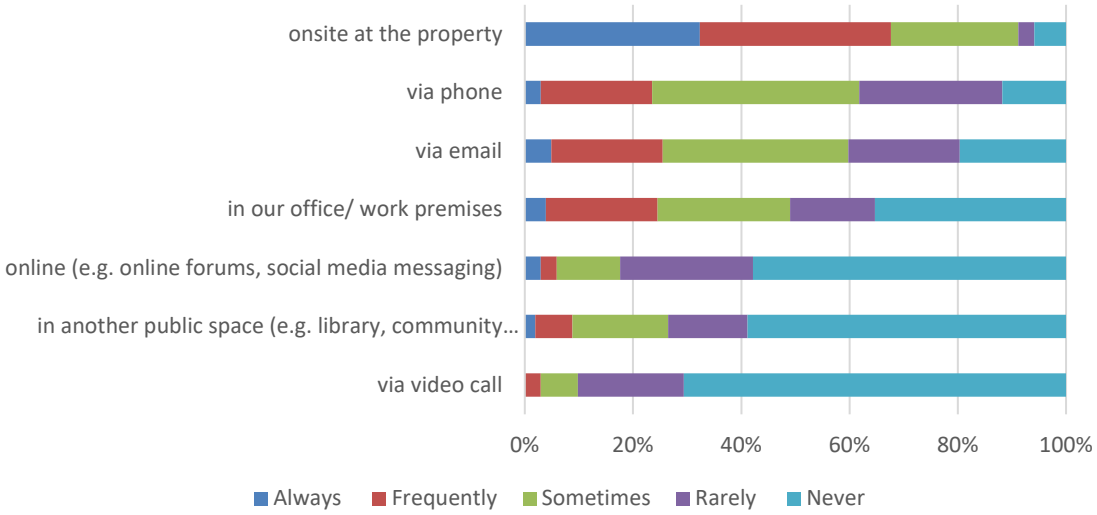


Figure 10: How often practitioners provided advice through different approaches

5.1.9 Who receives advice

Practitioners were asked to estimate the tenure or 'classification' of the people they had advised in the past year. Renters and owner-occupiers were the most common groups who received advice. Practitioners estimated that fewer of their clients were landlords seeking advice on a property they rent out or prospective new home buyers or people building new. No respondents advised one tenure category exclusively.

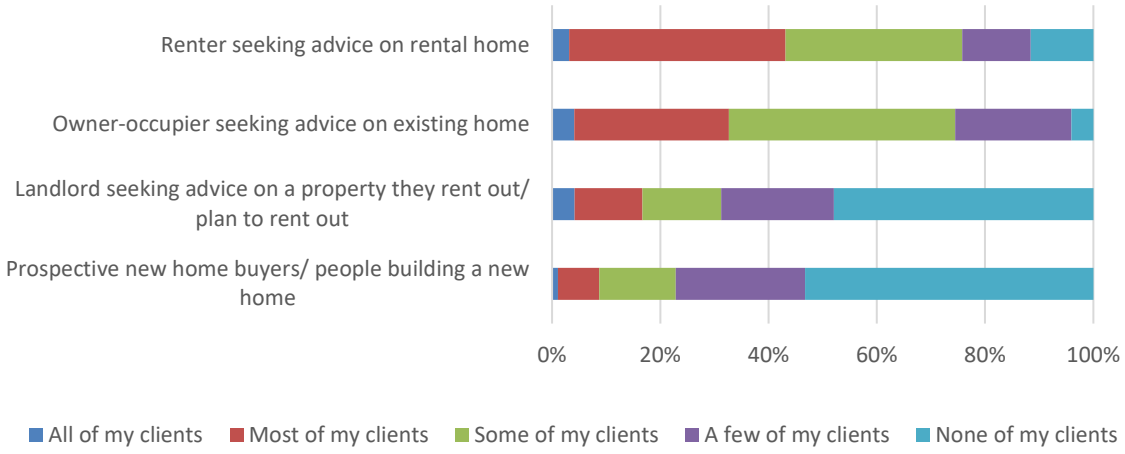


Figure 11: Tenure of clients receiving advice in last 12 months (Practitioner survey)

Eight respondents said that 'all' or 'most' of their clients were people building or buying new homes. Of these, six provide advice under the Passive House and/or Superhome frameworks. These respondents also tended more often to deliver their advice by phone.

There were differences between practitioners from not-for-profit and government, and commercial organisations when we asked them about who they were advising. Not-for-profit and government practitioners mostly provided advice to owner-occupiers and renters, and rarely to landlords or people building or buying new homes. Conversely, commercial advisors rarely worked with renters and mostly worked with owner-occupiers and landlords. Self-employed advisors were somewhere in the middle with landlords their most common clients and renters being advised infrequently. This is consistent with the advice programmes that these practitioner segments reported working within (Figure 6).

5.1.10 Follow-up with clients

Practitioners were asked how long after the initial appointment they followed up with clients, and what that follow-up covered. Just over a quarter of practitioners said they didn't do regular follow-up. Of those who did do follow up (74%), the most common timeframe was within one month of the initial advice provision, with fewer doing follow up within or at three months or within 3-12 months. Only one respondent said they would do follow up after one year.

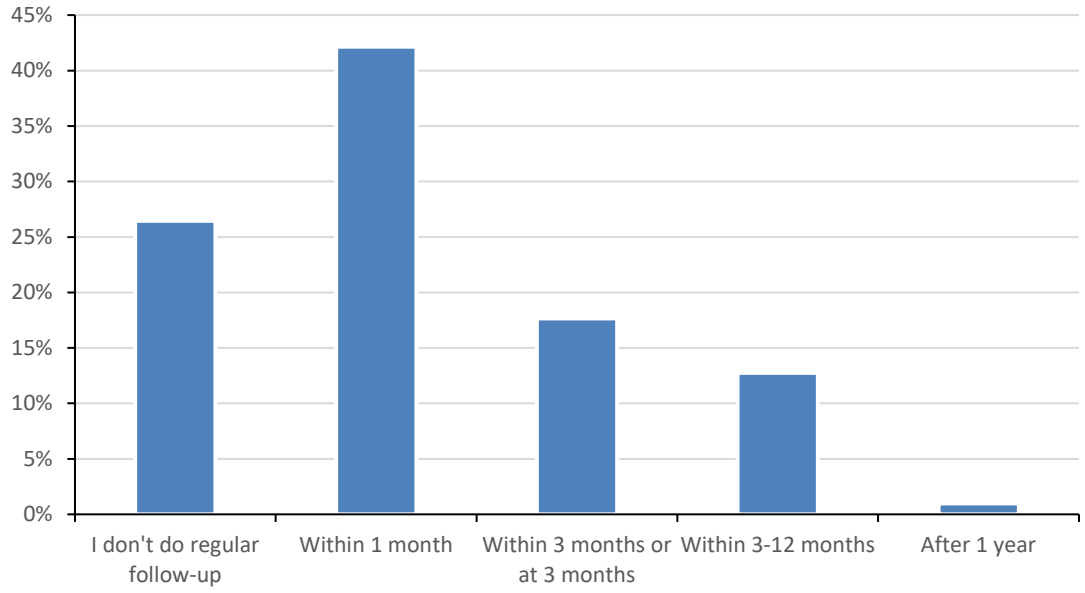


Figure 12: When follow-up occurs following advice

The most common focus of follow-up was whether clients had taken action, or intended to take action, as a result of the advice provided (80%). Follow-up also commonly covered whether the advice met the client's needs (75%), client satisfaction with the service (64%) and further questions or clarification (63%). A small proportion (12%) said their follow-up covered 'other' matters, although the survey did not ask for details.

5.1.11 Practitioner training and competencies

Most practitioners had completed HPA Principles (65%) and/or Certification (40%) training, while 21% had completed NZGBC HomeFit training and 14% HPA Healthy Homes: making energy work. ERGANZ Energy Mate Coach, NZGBC Homestar, PHINZ were each cited by a few. A very small proportion (3%) said they had none of the training options listed. In an open text 'other' question practitioners noted the following other relevant experience: professional experience in construction and property management fields (26%); or in social services, health, budgeting fields (15%); life experience such as living in or renting 'unhealthy' homes (18%); and other tertiary qualifications such as social services, mechanical engineering or environmental education (16%).

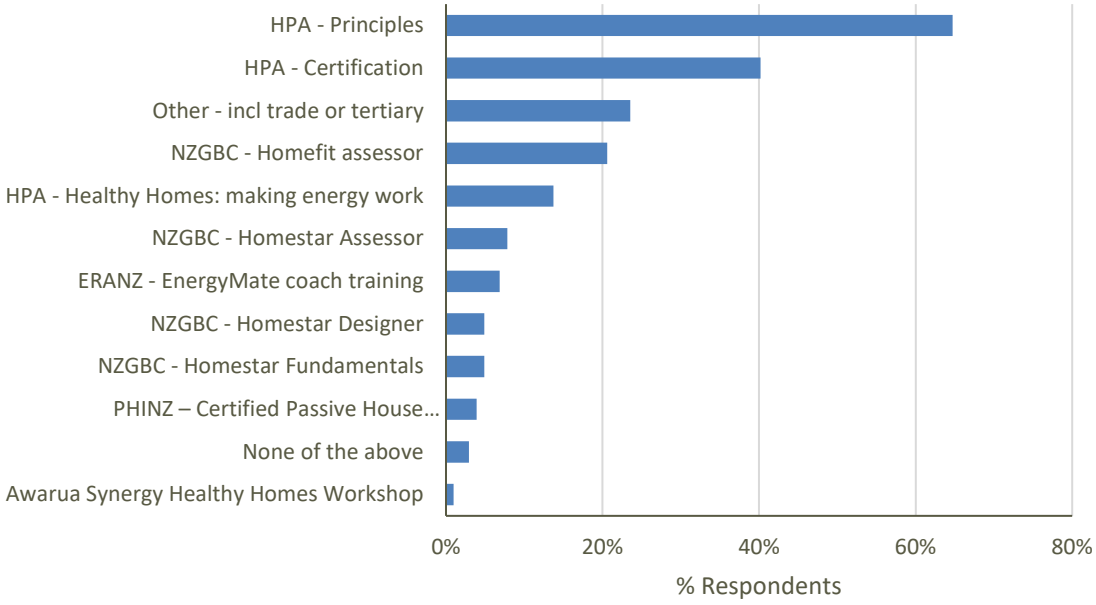


Figure 13: Practitioner training

When asked how they keep home energy advice knowledge up-to-date, practitioners indicated that this was largely self-driven – including independent study and information-sharing with peers.

Practitioners were asked about gaps in training / competencies or additional training sought, with 71% of respondents answering this question. The most common response was that they wanted more regular updates or refreshers especially around new legislation or research (10%). Understanding tenant / landlord rights (including relevant legislation) and how to support tenants was identified by 7%; and 5% wanted more accessible opportunities to attend HPA training (more frequent training events and/or lower cost). Other responses included more training on eco-housing, transitioning to solar and environmental impact.

5.1.12 Challenges reported by practitioners

When asked about the biggest challenges they faced in their day-to-day work delivering home energy advice, all respondents answered and nearly a third raised cost of living broadly, and more specifically the cost of solutions versus what households could afford to do.

> *Main focus for us is on cost of living crisis. People are in that survival mode, so find it hard to engage with anything else in a meaningful way. This is impacting on homeowners and renters alike.*

Finding or being able to engage potential clients was cited as a challenge by 18% of respondents. This included challenges finding clients "even though this is a free service" and challenges getting client engagement once identified (e.g. being available for appointments, being willing to listen to advice). Renter's lack of agency to take action to improve their home energy situation, fear of asking landlord to act, and/or landlord resistance to taking action were cited as a challenge by 17% of practitioners. Multiple respondents spoke about HHS non-compliance and /or ineffective enforcement being a challenge.

> *Landlords being allowed to self-certify for healthy homes compliance in lieu of independent assessment.*

Not having enough time to do the in-home work or follow-up adequately, especially where home energy advice is only one aspect of the role was cited as a challenge by a small number of practitioners (6%) of respondents. A few talked more broadly about the funded approach not always being adequate – in particular because the needs for relationship-building, trust-based engagement, and more holistic or interconnected ways of supporting households could not be supported on the limited funding available. Other challenges included: relationship-building and cultural sensitivity; client resistance to behaviour change including because existing mindsets reinforced unhelpful behaviours. A few respondents cited particular client needs or understanding gaps – particularly around ventilation and heating.

5.1.13 Opportunities and emerging needs

In response to an optional question asking what client needs advisors may need to respond to in the future, 85% of respondents provided an answer. A quarter highlighted cost of living / ability to afford home energy solutions. A similar proportion (23%) spoke about high energy costs or challenges relating to the energy system (e.g. confusing bills) and concerns about equity in relation to the energy transition. Some responses pointed out 'basic' needs are expected to still be there - dampness, glazing, ventilation, and mould.

> *I worry about the cost of an energy transition falling hardest on those who can least afford it in the future. Our climate is changing rapidly and investing in batteries and high-tech solutions is extremely expensive - so the cost of energy is likely to increase even more.*

In general, I see people's need has been growing as the overall economic situation is getting worse.

In the future, advisors will need to understand things like solar panels, heat pumps, and smart meters, but also be able to help families who can't afford those and need simple, low-cost solutions.

More than half of the responses that related to energy affordability and equitable transition mentioned solar as a key opportunity. Respondents connected rising costs of energy, difficult-to-understand energy bills and poorly performing houses as factors exacerbating energy stress on households. Solutions suggested includedimproved housing stock, and system-level responses to addressing affordable energy.

The issue of appropriate retrofits / best "bang for buck" to our existing poor housing stock will always remain a core requirement

We need central government support and incentives to move users to cleaner, alternative [energy] options.

5.2 Manager Survey

We received 36 responses to the Manager Survey.

5.2.1 Workplace settings

As with the practitioner sample, a majority of respondents worked in not-for-profit or government organisations. There was low representation of those working in commercial organisations and self-employed.

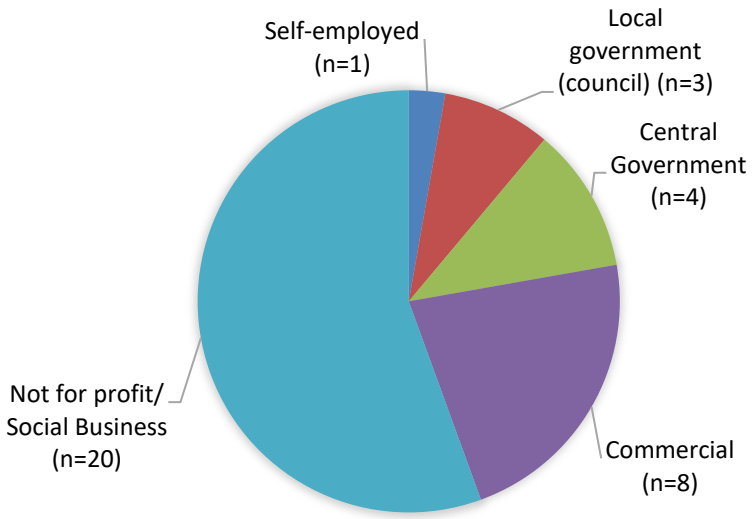


Figure 14: Organisation type of managers

Across the sample, 5/36 respondents worked in Kaupapa Māori organisations.

Half of managers (18/36) said that home energy advice is a significant part of the organisation's work but not the only work, with only 3/36 saying it was the organisation's sole focus. A further 15/36 said that home energy advice is a minor part of their organisation's work. Commercial organisations tended to be in the 'significant part of our work but not our only work' cohort (6/8) (Figure 14).



Figure 15: Significance of home energy advice by manager's organisation type

For most respondents, the other work their organisation did in addition to home energy advice was related to social and health or financial support, with fewer providing home energy advice alongside commercial sales and service. A majority provided advice under more than one programme or framework with HHI the programme most frequently worked with, but advice related to HHS also fairly common. This is consistent with practitioner responses to a similar question (Figure 6).

5.2.2 Operating model

Managers were asked to rate the importance of different funding sources to their advice work on the following scale: 'very important – provided all our funding'; 'significant – provided more than half our funding'; 'somewhat important – provided less than half our funding' and 'not important – no funding in last 12 months'. The responses show that central government funding was the source managers depended on the most, with 54% saying it was 'very important – provided all our funding' or 'significant – provided more than half our funding'.

The responses also highlight that many organisations are reliant on a single source of funding for their advice work. This ranges from 8.6% for 'client charge / contribution' to 26% for 'central government project funding'.

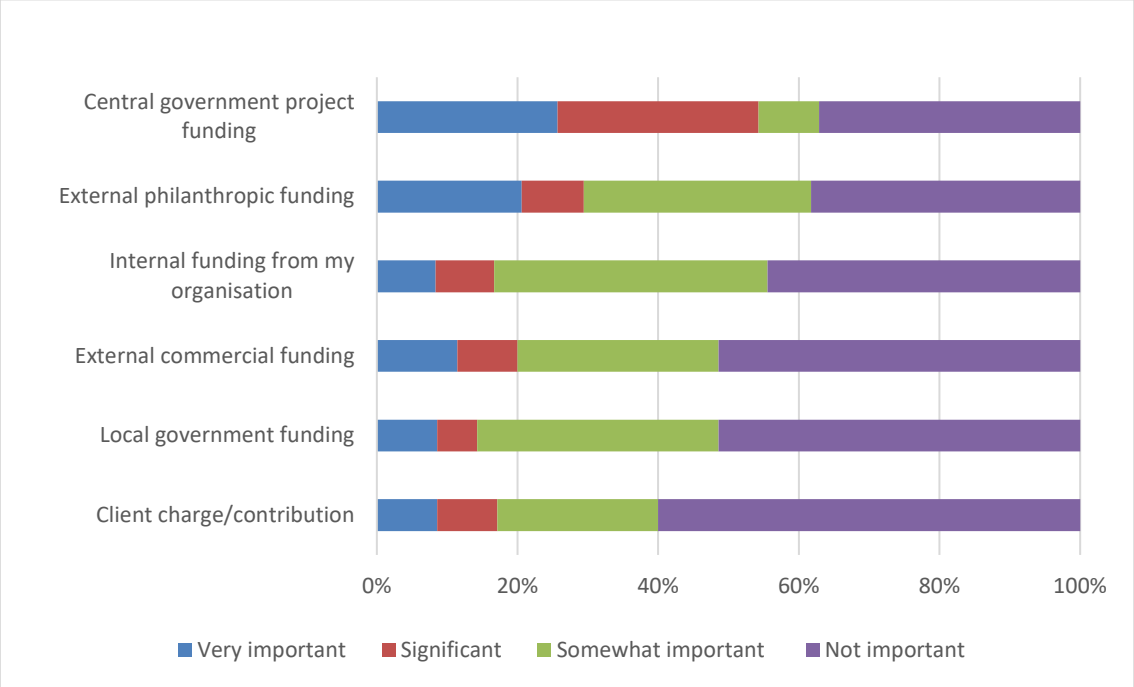


Figure 16: Significance of funding sources to manager's advice delivery

When asked what other factors were important in determining whether their organisation delivers home energy advice, subsidies such as WKH, central government funding for advice services, and legislative requirements such as HHS were the most important. An organisation's own resources or income, and external contracts to deliver the service were also selected by more than half of respondents, while household willingness or ability to pay and financing options for households were lowest but still very important for more than 30% of respondents.

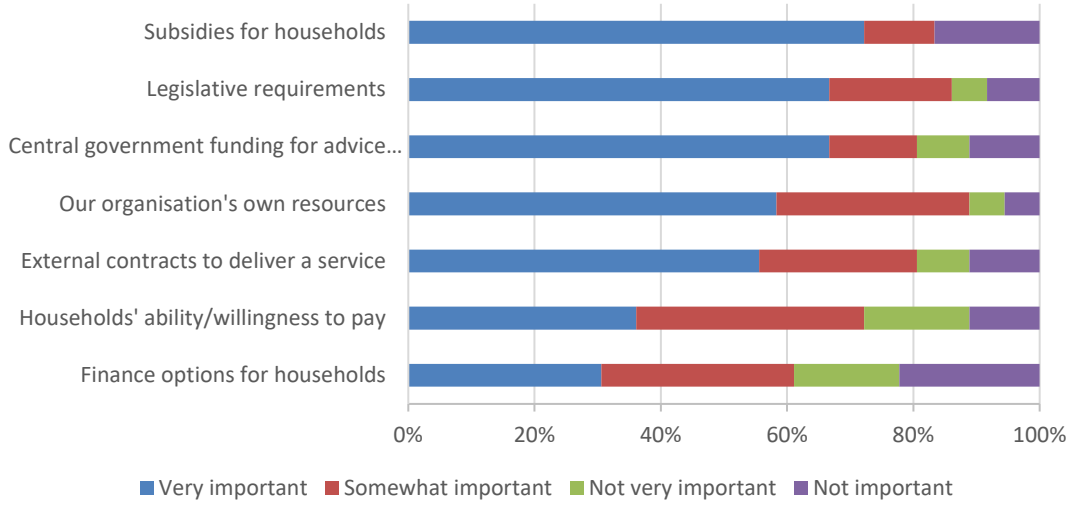


Figure 17: Importance of different factors in whether an organisation delivers home energy advice

When asked to rate to what extent funding available over the past five years allowed organisations to provide the level and quality of service they wanted, more than half (53%) said 'mostly' or 'completely'.

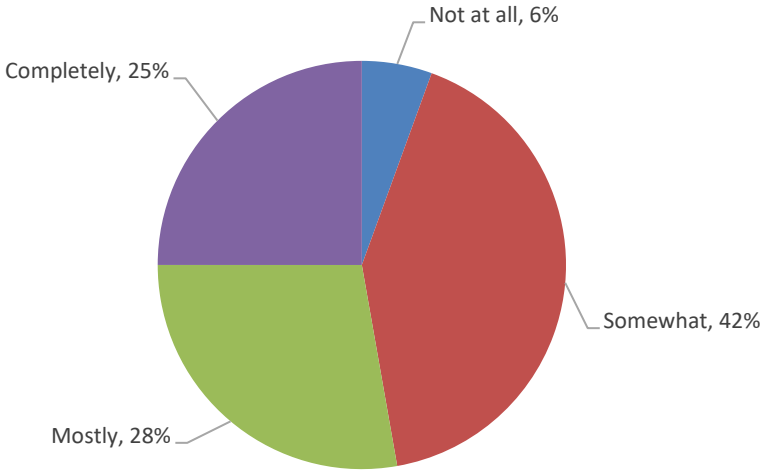


Figure 18: Extent to which managers' consider funding available over the past five years allowed their organisation to provide the level and quality of service they wanted

When asked about how confident they were that they could continue to provide advice at the level and quality of service they wanted for the next two years, 58% said they were 'somewhat confident'. A quarter were 'very confident' and a smaller proportion (16.7%) said they were 'not at all confident' or 'not very confident'.

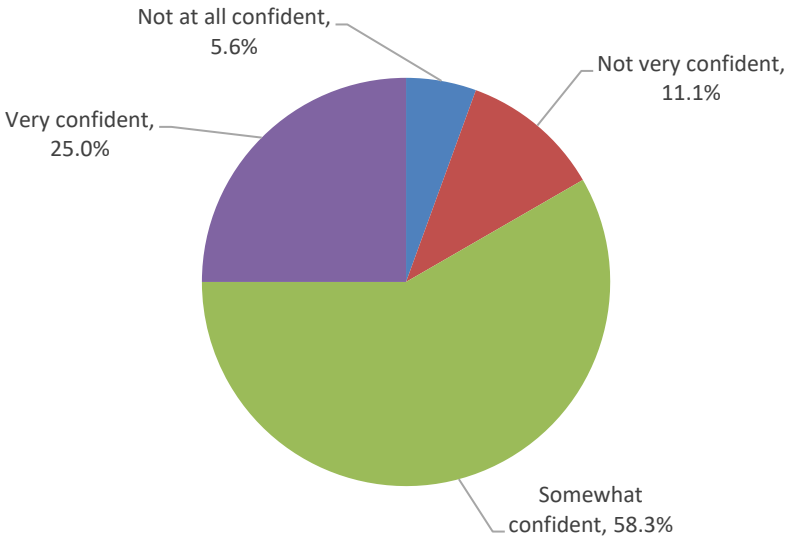


Figure 19: Managers' confidence they can continue to provide advice at the level and quality of service they want for the next two years

5.2.3 Who organisations aim to reach with their advice

Managers were asked who advice was targeted to. Generally, managers could identify more than one target group. People with low incomes were the most commonly identified group (21/36), followed by Pasifika people and Māori (18/36). Smaller numbers reported targeting people with disabilities, recent migrants to New Zealand, or no specific group.

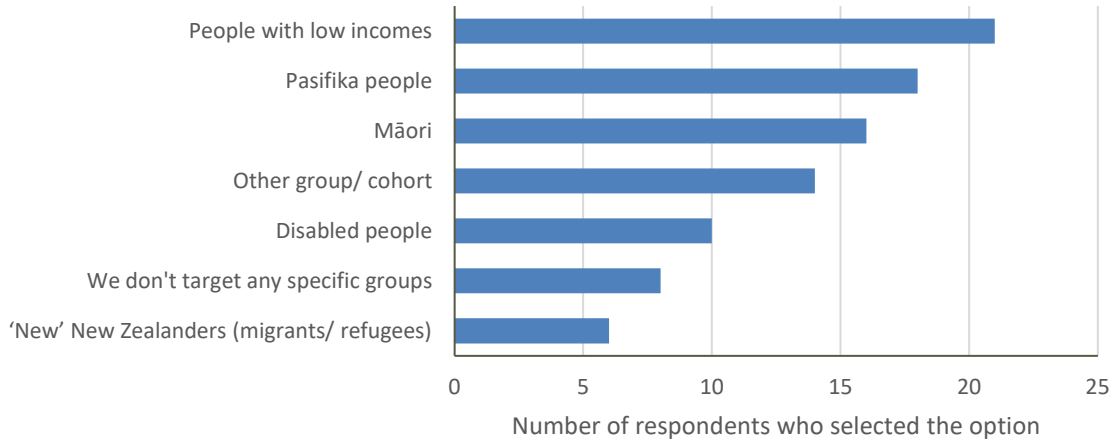


Figure 20: Households targeted for home energy advice (Manager survey)

'Other' was chosen by 14 respondents (39%), and when asked to specify, they said their targeted population segments included children or households with children, elderly/kaumatua, people wanting high performance homes, people in hidden energy hardship and "anyone who asks."

Managers were asked to choose the top three reasons their organisation provides home energy advice. Energy wellbeing and improving health were the most common reasons. Reduction of households' environmental impact was in the top three for less than half of managers. 'Other' responses highlighted wellbeing of target communities and ensuring standards were met to comply with HHS.

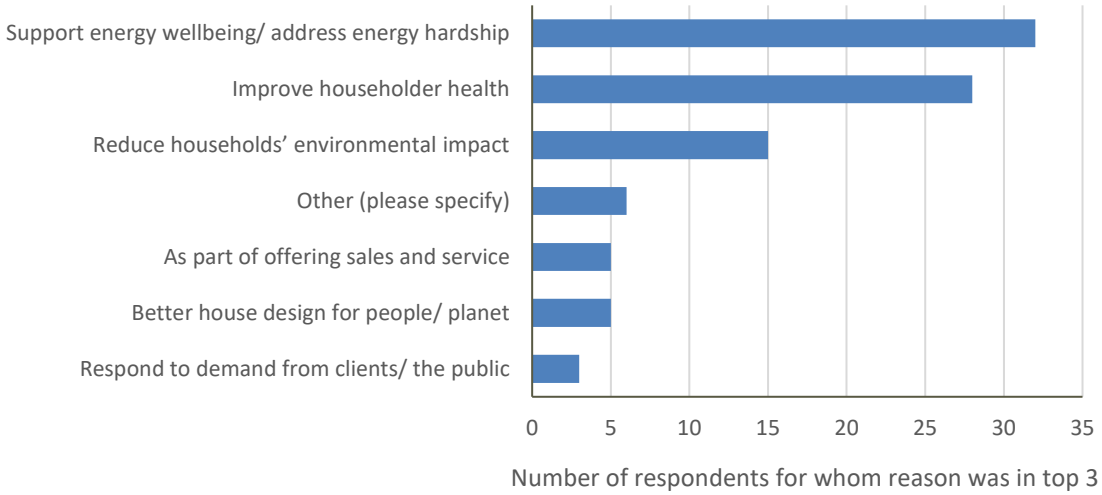


Figure 21: Main reasons organisations provide home energy advice

5.2.4 Measuring impact

When asked how the organisation measured the impact of home energy advice, the most common response (12 of the 22 who responded) was via surveys. Others used regular reporting or evaluation, research (He Kāinga Ora-led HHI evaluation was specifically mentioned), client contact post-intervention, or the PowerSaver tool to measure impact.[17]

5.2.5 Organisational training requirements

When asked if their organisation has minimum training requirements for home energy advisors, 29/36 managers said they did. Of these, more than half (15/29) said their minimum requirements are driven by a mix of funder requirements and internal policy; (13/29) internal policy only and much fewer (3/29) by funder requirements only. Two 'other' responses specified that HPA Principles was their minimum training requirement.

When asked about gaps in training/ competencies or additional training sought, respondents specified: cultural sensitivity and deescalation; subject area training (including climate change, energy efficiency, HHS, emissions trading and energy sector generally); and report-writing.

Manager responses to a question about training provided or funded by organisations indicated most training funded by organisations is in the 'basic training' realm (e.g. HPA Principles of Home Performance).

[17] The PowerSaver tool is a tablet-based energy assessment tool used by EcoBulb.

5.2.6 Challenges and opportunities identified by managers

Responses about challenges, risks, needs, and opportunities showed some areas of commonality and overlap, although no single issue was raised by a majority of managers. Instead, a number of topics were mentioned by similar proportions of respondents across the sample:

- around one-fifth of managers (7/36) identified the cost of living as a current challenge or risk. This often related to the gap between the cost of recommended solutions and what households could realistically afford
- similar issues emerged when managers discussed current and emerging needs. Eight managers (8/36) highlighted high energy costs, difficulties navigating the energy system (for example, understanding energy bills), and challenges associated with the energy transition
- six managers (6/36) identified barriers faced by renters, including limited ability to make changes to homes, reluctance to approach landlords, and landlord resistance or inaction
- funding constraints were also commonly discussed. Six managers (6/36) identified inadequate or uncertain funding as a current challenge, while almost a third (11/36) viewed it as a risk over the next 5–10 years.
- looking ahead, seven managers (7/36) identified opportunities arising from the energy transition, including investment in solar panels, electrification, decentralised and low-carbon energy generation, and a more efficient electricity network
- a smaller number of managers (5/36) also viewed increased funding for advice services as a future opportunity.

Several respondents identified misinformation, biased advice and/or lack of consistency or standardisation of advice as a current and future risk. Others mentioned the need for better industry integration, and an energy sector that worked better for householders.

Other responses addressed the opportunity for more cooperation and collaboration, including standardised minimum qualifications for advisors including regular updating; the integration of digital tools to support assessment and in-home monitoring; teaching in schools about home energy efficiency and maintenance, better reaching people most in need.

6 Stakeholder interviews

This section presents findings from stakeholder interviews, using qualitative data to explore the home energy advice system and how it is evolving. Interview participants were drawn from two stakeholder groups. They either had:

- a *direct, established interest* in providing or supporting home energy advice (e.g. advisor training organisations, funders), or
- an *indirect or emerging interest* in home energy advice (e.g. electricity suppliers, retail banks).

In total, interviews were conducted with 31 participants from 24 organisations spanning diverse organisation types including central and local government, not-for-profit organisations, private sector organisations, and membership bodies. Functions of these organisations included:

- delivering advice
- research
- central government policy (including funding, regulation and monitoring)
- local government policy and service delivery
- training
- advocacy (including housing quality, community wellbeing, electricity industry, energy transition, insurance[18])
- electricity supply
- retail banking.

Interviews provided detailed insights into current delivery models, system capability, trends, challenges and opportunities. Participants with a direct interest in advice tended to have a stronger focus on delivery and advisor practice, while those with an indirect or emerging interest tended to offer broader system-wide perspectives.

The themes presented in this section reflect patterns observed across interviews and are intended to complement and extend the survey findings. In some cases, views raised by a smaller number of participants are included as indicative of emerging ideas or developments and are reported accordingly. The findings are organised across four broad thematic areas that reflect key focus areas in our deductive framework:

- workforce capability and capacity
- system trends shaping demand and delivery
- system challenges and constraints

[18] These organisations advocate for the interests of members and / or to achieve a particular purpose.

- system enablers and opportunities

Quotes are anonymous, however in each case we have indicated the organisation type (e.g. not-for-profit, central government) and its function in the home energy advice system.

6.1 Workforce capability and capacity

Participants accounts reflect that workforce capability is variable. The most prominent concern was the absence of consistent minimum training requirements. Participants also identified gaps in current training content, limited opportunities for ongoing professional development, and the need for stronger cultural capability and capacity. Some participant responses highlighted a tension between improving consistency and avoiding additional costs or barriers to entry.

6.1.1 Minimum training requirements and baseline capability

Minimum training requirements and baseline capability for advice practitioners was a common theme within the interviews, particularly amongst stakeholders closest to delivery. This included funders and delivery and advocacy organisations.

Participants' accounts reflected that many organisations and funders now have minimum training requirements, often tied to specific programmes. For instance, one noted, "we have a minimum requirement of HPA level one[19] for all frontline people" (Central government, policy and funding). Some delivery organisations have also established their own internal competency requirements, with one noting "we want them all trained. We don't want them just going out and giving advice, without the training" (not-for-profit, delivery). However, participants described these requirements as programme-specific and inconsistent across the wider system.

Participants raised specific concerns about the absence of minimum training requirements for HHS for rental properties assessors. Although these assessments are intended to check compliance with regulatory standards, participants noted that assessors may also provide advice to landlords or tenants. This raised concerns about consistency, credibility, and whether compliance assessments are meaningful in practice, for instance:

> *…the lack of any kind of requirements […] to be able to go into a home and say, yes, this house complied that I think is a concern (not-for-profit, research)*

> *You can be a postie today… and go and start assessing rental properties tomorrow. (not-for-profit, training)*

[19] This is Principles of Home Performance.

While some participants called for stronger and more consistent requirements, others were more cautious about the potential downsides of increasing or formalising standards. These included the risks of increasing costs and creating barriers to entry into the field.

> *Yeah, it's this balance, because you don't want to add transaction costs for people who are just on the ground trying to do good work. (central government, policy and funding)*

> *I honestly don't think accreditation is the answer, because the higher the thresholds to be accredited, the lower the reach is going to be. (not-for-profit, advocacy)*

This reflects there may be a tension between improving consistency and increasing capacity in the workforce.

6.1.2 Gaps in existing training

Closely linked to the minimum training requirements theme were participants' observations of gaps in current training. These were most frequently raised by participants in delivery, training and advocacy roles.

Supporting technical and financial decision making

Participants identified gaps in training where households are required to navigate increasingly complex technical and financial decisions. This included both emerging technologies - such as solar, batteries, and electrification pathways - and the ability to support households to understand costs, benefits, payback periods, and trade-offs.

Participants noted that training has not always kept pace with rapid changes in technologies, and that advisors need stronger skills to help households understand where these options sit alongside other priorities. They also emphasised the importance of presenting financial information - such as upfront costs and long-term savings - in ways that are support household decision making

> *…at the end of the day we need more advice or training I think on new technologies, new applications, and really where they sit, in the sort of full range of recommendations that you can have. (not-for-profit, advocacy and delivery)*

> *… to really distil down what could be quite complex decisions and trade-offs and present cost versus future cost and all these kinds of things into something that's understandable and actionable. And you know, not intimidating or off putting. I mean I'm sure it's not going to be an easy job. I don't envy them the task" (not-for-profit, advocacy)*

Other gaps in training that were raised by participants included helping people understand their energy bills and tariffs and the need for training to support advisors' mental wellbeing

with one participant concerned for the wellbeing of advisors who are frequently faced with people's challenging circumstances.

6.1.3 Ongoing professional development

Ongoing professional development was identified as a clear gap in the current system, particularly by participants closest to delivery. While some initial training pathways exist, participants described a lack of structured, system-wide opportunities for advisors to regularly update and maintain their knowledge, leading to knowledge becoming out of date and inconsistency across the workforce.

Participants also emphasised the practical barriers to sustaining professional development, particularly funding, time, and provider capacity, for instance:

> *we've tried over the years to support them, with continuing professional development for their advisors, and that's never really kind of taken off. I think challenges just being probably funding, resourcing, and you know, people capacity. So, that probably is a gap. (not-for-profit, research)*

These constraints have limited the ability to deliver ongoing training and coaching consistently. As one participant put it*:*

> *how do we pull people back in for continual training and coaching? Because there's a cost to that, there's a time cost, there's a financial cost." (not-for-profit, training).*

While not raised by all participants, those in delivery, funding, training and research roles expressed ongoing professional development as a strong system-level gap.

6.1.4 Cultural capability and capacity

A further dimension of this theme concerns the workforce's ability to operate effectively across different cultural contexts, alongside broader issues of workforce composition. These perspectives were most often expressed by participants from delivery, funding, advocacy and training organisations.

A small number of participants identified a lack of workforce diversity, particularly too few advisors from Māori and Pasifika communities, which was seen as limiting the sector's ability to reach and support these households effectively. As one participant noted:

> *nine times well, maybe seven times out of 10 it's going to have to be a Māori or a Pasifika advisor. And so, I just don't think we've got enough of those. (not-for-profit, advocacy)*

At the same time, others who fund advice that reaches Māori and Pasifika communities, emphasised that non-Māori advisors work effectively with Māori whānau where strong relationships and appropriate ways of working are in place:

> *But the ones that are non-Māori, you know, we also have a good relationship and see how proactive they can be in supporting […] sharing the ideas or sharing ways of working with whānau. (Central government, policy and funding)*

These views suggest that while some advisors are proficient at working in cultural contexts that are not their own, there may be a need for more training advisors from the communities being served. One delivery organisation focusses primarily on Pasifika families and matches advisors carefully to the households for this reason.

> *…one of the things that was very clear to me was making sure that all my staff are home performance advisors, properly, through HPA. And that they can translate that into Pacific, to make sure we can educate our families on empowering them to [have] better performing in their homes. (not-for-profit, delivery)*

A small number of participants raised concerns that existing training resources were not sufficiently responsive to Māori and Pasifika advisors "we've had feedback, it's not culturally appropriate" (central government, funding and policy). Some also described challenges in cross-cultural communication between different actors in the system, including instances of people 'talking past' each other:

> *I do find a challenge has been um the cultural disconnect, between myself as a Pākehā Palangi and some of the providers… (not-for-profit, advocacy and funding)*

Some participants talked about the potential kaupapa Māori network for advisors but were unsure where leadership or support for that would come from. One participant emphasised the need for Māori and Pasifika communities to be central to any initiatives to improve national coordination:

> *I looked quickly to see who was represented, the minority again is the people who matter the most. They must drive it. […] But they need to trust you to drive it… (private sector, funding)*

Some participants also noted the value of translating resources into other languages, although resource constraints were a barrier. Overall, community-facing participants emphasised the importance of cultural understanding, language, and representation in building trust and delivering effective advice and that more work may be needed to strengthen the system in this regard.

6.2 System trends

Across the dataset, participants identified several trends shaping the operating environment for home energy advice. Three main themes emerged from the data: the shift towards electrification, which was often discussed as being accelerated by rising energy costs; associated equity risks and unintended consequences; and an increasing focus on climate adaptation and resilience.

These themes were not equally emphasised. Electrification and energy costs were discussed consistently across the dataset, while equity concerns were raised most often by delivery and advocacy organisations. Climate adaptation and resilience were discussed across most stakeholder groups, particularly financial services, insurance, and local government, but were not prominent in central government interviews.

6.2.1 Electrification

Electrification and the transition to a low-emissions energy system were widely discussed as a trend shaping the context for home energy advice. Participants described this as a structural shift already underway, often treated as an assumed backdrop to broader system changes, with one noting it was "coming whether we want it or not" (not-for-profit, advocacy).

Participants highlighted increasing uptake of technologies such as solar, batteries, electric vehicles, and a shift away from gas. This was seen as increasing the complexity of household energy decisions. As one participant described:

> *Thinking about the residential setting people will need to be armed with good advice about the choices they can make in terms of how they heat their homes, heat water, power their vehicles, you know, perhaps adopt small scale distributed generation or vehicle to grid technologies. There's a lot of new things, new decisions that are going to be, and opportunities, I suppose, available to homeowners and renters, and I'm sure it will be confusing and challenging to navigate. (not-for-profit, policy and advocacy)*

Electrification was seen as associated with both increased demand for advice and a broader potential role for home energy advice in supporting more complex household decision-making. This was reflected across both system-level and delivery-focused participants. Some participants also linked rising gas prices and supply constraints to increasing electricity prices and a shift towards electrification:

> *Well, just the transition to electrification, you know, resilience, people wanting to do whatever they can to get their power prices down. So, yeah, transitioning away from gas will be a big one. Solar installs, all of that tech stuff. (not-for-profit, advocacy and funding)*

Rising electricity and overall energy costs were also seen as influencing household behaviour and increasing interest in alternative technologies such as solar and electric vehicles.

> *Electrification is the big one. We're seeing a real uptick in people looking to get off gas. People just don't know where to start. (not-for-profit, advocacy)*

Overall, participants consistently described electrification as a major transition that is increasing the complexity of household energy decisions and, in turn, the potential relevance and demand for Home Energy Advice.

6.2.2 Electrification – Equity and access

Alongside the opportunities associated with electrification, many participants raised concerns about equity and access during the transition, particularly that not all households will be able to participate in or benefit from emerging technologies. These concerns were most strongly expressed by delivery organisations, advocacy groups, and some electricity industry participants - with a direct interest in home energy advice - who are closely connected to households and their experiences.

Participants highlighted financial barriers for lower-income households, limited agency for renters, and the risk that system costs may be disproportionately borne by those who are least able to invest in new technologies:

> *The problem is […] the more people that put in solar and batteries and come off the system, the more costs there are to spread over the rest of the people connected to the network, possibly the ones that can't afford to do so. Because they can't afford to put solar on or they're in rentals and they have no choice. (central government, policy)*

There were also concerns about advice being influenced by the shift to electrification, with some participants noting that households may be encouraged to invest in electrification before more fundamental issues such as the building envelope and moisture management have been addressed:

> *I think the push is sometimes going quite hard and quite fast, and we miss the point of addressing the thermal envelope or the immediate needs of the home. So, let's say we get a house electrified, and that's where their money is spent, but the house is still cold and damp. So that worries me. (not-for-profit, training)*

Together, these perspectives highlight concerns about how the benefits and costs of electrification are distributed, how electrification affects the delivery of home energy advice and the households being served, and how advice can support households to prioritise actions appropriately.

6.2.3 Climate adaptation and resilience

Climate adaptation and resilience emerged most strongly in interviews with participants with an emerging interest in home energy advice, and were also raised by local government, advocacy, and delivery organisations. It was less prominent in central government interviews.

Participants emphasised climate adaptation in different ways. For financial services, insurance, and local government, the focus was on managing the risk of loss from hazards such as flooding and extreme weather, and the implications for insurance, lending, and asset values:

> *The government is also realising that it can no longer afford to […] be the insurer of last resort. And is looking to the private sector, banks and insurers, to carry that role. So, […] as the impact of climate change becomes more severe, the behaviours of people in the ecosystem - government's, insurance, banks in particular - is changing, because ultimately, we're all trying to manage our risk of loss. (Private sector, retail banking).*

A participant from an advocacy and delivery-focussed organisation put it another way and highlighted the relevance of these actions for Home Energy Advice.

> *… banks, insurance companies […] are very, very interested in this kind of service because they have prudential requirements to follow and that can include things like greening their portfolios or reducing risk. So, I think almost everything that we do has a bearing on it, well everything that we as advisors say has a bearing on that risk. (not-for-profit, advocacy and delivery)*

Local government also has a strong focus on risk-mitigation, having been assigned responsibilities for climate adaptation under the National Adaptation Plan 2025. A participant from local government made the connection between climate adaptation, resilience and home energy advice like this.

> *…we know we have hundreds of households here that are subject to stormwater flooding, and rather than undertake an incredibly expensive managed retreat situation, are we able to provide advice, support, financing for getting people to be able to lift their home out of the flood zone? (local government, delivery and policy)*

Other participants, including those in advocacy, policy, and training roles, focused more on resilience, particularly maintaining energy supply during weather-related outages:

> *… we are seeing increased […] severe weather events and increased electricity outages. So, having a house or a car, as well, that you can at least keep some of your house going. Even if it's just your fridge or the ability to charge your phone or stuff like that. Yeah, I think that is something that New Zealanders seem to be able to get behind. (central government, policy)*

Across these perspectives, participants identified an emerging role for home energy advice in supporting more resilient and adaptable homes, including potentially helping system actors – banks, insurers and councils – and households respond to increasing risks, costs, and system changes.

6.3 System challenges and constraints

Participants identified several challenges affecting home energy advice and the organisations involved in delivery. Three related themes emerged: affordability and households' ability to act, funding and reach of services, and the quality and complexity of advice.

6.3.1 Affordability and energy costs

Affordability was a strong and consistent theme across the interview, raised by participants with a direct and emerging interest in home energy advice. It was most often framed in relation to rising energy costs and the broader cost-of-living pressures facing households.

While energy costs are also discussed under electrification, participants here focused on their immediate impact - limiting households' ability to act on advice or meet basic energy needs such as heating and hot water. Affordability was consistently identified as a primary concern, with participants emphasising that many households already understand what would improve their homes but lack the financial means to proceed.

These pressures were described as shaping how households use energy, sometimes leading to constrained decision-making and behaviours with potential health impacts:

> *One of the big things, which I'm sure you're going to hear everywhere, is the cost-of-living crisis is having a huge impact. […] We're also seeing things where people might have heat pumps in the home but don't turn it on because they can't afford it. So that cost-of-living stuff is huge. (central government, funding and delivery)*

> *We've seen people turning off their hot water cylinders, to save money. It's bad for Legionnaires disease […] it's just really not good for people to do that. (not-for-profit, advocacy and delivery)*

Participants also linked these household-level impacts to wider system pressures, including rising electricity prices and infrastructure costs:

> *Power prices are up fourteen percent, gas more than that. People are under real financial stress. (participant, advocacy and policy)*

For some, these pressures were no longer confined to traditionally vulnerable households, with a small number noting that rising energy costs were beginning to affect a wider range of households, including their own.

I used to not worry about it, but now every time I hear a news article going, oh, we've got only half the amount of gas left that we thought we did and it's about to become really expensive, a little red light goes off for me. (Private sector, retail banking)

Taken together, these accounts highlight affordability and energy costs as central factors shaping whether households can act on advice and meet basic energy needs.

6.3.2 Funding and reach of advice services

Access to home energy advice is shaped by the availability and criteria of funding or relies on commercial delivery models. Interview participants described funding as limited, variable, and a key constraint on both the reach of services and households' access to advice.

Several participants described a general lack of coverage, with existing services insufficient to meet demand with one participant noting, "every group is underserved" (not-for-profit, advocacy). Issues also included gaps in provision across some areas, as well as a fragmented system that made services difficult to promote or connect households to. For example, one advocacy organisation described difficulty supporting a household when no services are available "we went to all these places we knew, and no one did anything there" (not-for-profit, advocacy) and a private sector participant described the challenge in promoting advice services nationally "you know, it's just currently so fragmented, that there would be nothing there, that we could point to, that is consistent enough" (Private sector, retail banking).

Participants also highlighted that funding shapes who can access services. Changes in funding criteria can significantly alter delivery.

… we used to have funding from City Council to provide our [programme name], and so that basically offered home assessments for everybody. But that funding got pulled… so we just have support to be able to offer it to our lower income households. (not-for-profit, delivery)

More broadly, funding was described as short-term and uncertain, creating instability for providers and limiting their ability to plan and sustain services. For instance, participants talked about the risk to existing services, with some discussing services being under threat "each year it actually could be up for review, which makes it really hard" (local government, delivery) One participant captured the sentiment as follows.

So, the big risk is money. Funding. We're stretched, the not-for-profits we work with are stretched. A lot of funding has dried up, particularly government funding, research funding, project money. At the same time, demand is increasing. (not-for-profit, advocacy)

A further dimension of access concerns the mode of delivery. Participants noted that while generic information and online tools may be useful, they are not effective for all households -

particularly those experiencing energy hardship, those with limited income, older people, or those who speak English as a second language. These participants highlighted the continued need for personalised, in-person or supported advice:

> *especially elderly people, or people where English isn't their first language […] they can't just be sent to a website and told 'good luck'. (not-for-profit, advocacy)*

> *these generic messages are great, but ideally at the end, we'd go reach out to your local HPA or EDA for personalised advice. And […] it's hard to do that on a national Facebook post or Instagram post, because some people will go, well, I don't have one [in my area]. (not-for-profit, research)*

Taken together, these perspectives highlight how funding constraints, fragmented services, and delivery models interact to shape who can access Home Energy Advice, and the extent to which services can respond to existing and emerging demand.

6.3.3 Quality, consistency and complexity of advice

Participants identified several risks and challenges relating to the quality and consistency of advice available to households. These fell into three related areas: variability in the quality of advice provided by home energy advice practitioners, the presence of poor quality or biased advice within the wider advice system, and the increasing complexity of advice. These issues were not consistently emphasised, with the two latter themes expressed more consistently across the dataset. Sentiments about quality, consistency and complexity of advice were most common among organisations with a focus on delivery, or policy stakeholders with a system-level view.

Some participants raised concerns about the consistency and accuracy of advice provided by practitioners. These included the risk that advisors may not have relevant training or up-to-date knowledge or may provide advice beyond the limits of their expertise, increasing the likelihood that advice may be unhelpful or, in some cases, detrimental:

> *you have to recognise where your expertise starts and finishes… and where someone else has a level of technical expertise that you can refer into." (not-for-profit, funding and delivery)*

Across the interviews, participants consistently raised concerns about misinformation in the wider advice environment, where households receive information from a range of sources such as tradespeople, builders, product suppliers and real estate agents. Participants described multiple instances of inaccurate, inconsistent, or biased advice from these sources, reflecting the influence of actors who may not identify as providing home energy advice but nonetheless shape household decisions.

Lots of fraud. Lots of proliferation of bad advice. We see lots of terrible advice out there. It's free, but it's terrible. It's pushing people towards decisions that are bad for them, and they don't know any better (not-for-profit, advocacy)

I've just gone through a recent, raft of renovations at our house, and the amount of stuff that builders and plumbers and electricians have said to me (not-for-profit, training)

Some participants also observed that advice is becoming increasingly complex, driven by factors such as electrification, new technologies, and greater system flexibility. This was seen as creating additional challenges for both advisors and households, particularly in maintaining consistency and clarity:

It's been on the horizon for a long time, but I think we're now reaching a point where this two-way flexibility and control of devices will unlock a lot of potential. But there will come a time pretty quickly when we will need to provide really good quality advice around flexibility, because that's next level complexity. (Central government, policy and funding)

Taken together, these perspectives highlight concerns about the quality and consistency of advice across the home energy advice system, alongside the increasing complexity of decisions that advice must support.

6.4 System enablers and opportunities

Participants identified several factors that enable or strengthen the effectiveness of Home Energy Advice. The most prominent theme was that effective advice is relational and dependent on trust. Participants also identified a range of additional enablers and opportunities, which were raised less consistently and are presented here as indicative areas of interest.

6.4.1 Relational delivery and trust key to effective advice

Participants consistently described effective home energy advice as fundamentally relational and dependent on trust. It was most strongly articulated by participants in delivery, advocacy, and funding roles, drawing on their direct experience with households. Trust was also widely referenced across the interviews. Delivery-focused participants tended to describe trust as something developed through interaction and ongoing engagement, while system-level participants emphasised credibility, independence, and the role of trusted intermediaries.

Participants emphasised that effective advice depends on the advisor's ability to relate to the household. This was described in terms of interpersonal and communication skills, including listening, empathy, and the ability to adapt to the household's circumstances. As one participant noted, "compassion, empathy and care and build[ing] that trust is fundamental"

(not-for-profit, delivery), while another highlighted the importance of being responsive to the circumstances, “being able to read the room” (not-for-profit, advocacy).

A related and frequently raised point was the need to pace and tailor information to the household. Participants noted that advice can become ineffective if it is overwhelming, and that advisors need to judge what information to provide and when:

> *advice can become ineffective if it’s too much (not-for-profit, training)*
> *we know that whānau can't take on board that messaging, when you give too much at once (central government, funding and policy)*

Communication was seen as central to effectiveness, with participants emphasising both how advice is delivered and how well it can be understood. One participant described this as: “advice is communication, so it’s probably 90% how you say things and 10% what you say” (not-for-profit, advocacy and delivery). Others similarly highlighted the importance of being approachable and relatable, noting that effective advisors are “down to Earth” and “great with people” (not-for-profit, delivery).

Trust was closely linked to these relational skills and was described as influencing whether advice is accepted or acted on. One participant stated summed this up as, “trust is massive” (not-for-profit, advocacy). Participants referred both to trust developed through direct interaction with advisors and to the perceived credibility and independence of advice. For example, one participant noted that households seek advice and “want independent advice, because they are sick of being sold things without solving the issue” (not-for-profit, advocacy and delivery). At a system level, trust was linked to credibility of the source of advice “you know, trustworthy and credible sources of information” (not-for-profit, advocacy) with several policy participants also acknowledging the role of trusted intermediary organisations as important to reaching people, “we know that the best way to reach them is through community organisations or people who provide sort of direct services or direct advice to households.” (central government, policy).

Participants also described trust as something that often develops over time through repeated engagement, rather than a single interaction:

> *“it takes a while… building that trust… it could take two or three visits” (not-for-profit, delivery)*

Finally, participants emphasised that effective advice must be tailored to the specific context of both the home and the household. This includes technical factors as well as household needs, priorities, and capacity to act:

> *whilst we can give generic advice, you know, insulate your roof, and double glazing and all of those things. I think the advice is critical in helping people at the individual level,*

because every home is different, everyone has different needs, everyone has different capacity to act. (not-for-profit, research)

Taken together, these accounts describe effective home energy advice as relational, responsive, and context specific. The ability to communicate clearly, build trust, and tailor advice to individual circumstances was consistently identified as central to engagement and effectiveness.

6.4.2 Co-ordination and alignment

Participants described home energy advice as delivered across a range of programmes, funding streams, and organisational arrangements, rather than through a single coordinated system. This was most evident in accounts from delivery-focused participants, who described operating across multiple initiatives, including the HHI, electricity retailer-funded programmes, SEEC-funded activities, and iwi-supported services.

Within this distributed landscape, coordination was often achieved through relationships and informal networks. Participants described partnerships between community organisations, iwi providers, and government programmes as central to enabling delivery:

We tie in with a lot of other groups — EDBs, FinCap, EnergyMate, Sustainability Trust. When we get special cases, we know who to ring at the retailers, or who to connect people to. (not-for-profit, advocacy)

We've got a strong network to CEN network, sort of the SEEC, Healthy Homes Initiative network. We're all quite connected and we're all supporting each other. (not-for-profit, training)

Some participants also reflected on opportunities to strengthen coordination at a system level. Several suggested that a national body could improve consistency, support professional development, and help attract funding or investment, as well as provide a clearer point of connection for the sector.

One thing I would recommend after your research is the creation of some form of National Association of Home advisors, because I think the opportunity to not only create greater consistency of service, but also some of their professional upskilling. And it gives a, if it's done properly, […] that air of professionalism to the client as well. (local government, policy and delivery)

Relatedly, some participants referred to proposals for a Community Network Initiative as a form of "national infrastructure" (central government, policy) that could support local delivery while also providing a single point of contact for government. Participants who raised this

were generally supportive, although one emphasised the importance of ensuring strong Māori and Pasifika representation within any national structure:

> *"You must be reflective of the community… or we're going to keep doing the same thing." (private sector, funding)*

Taken together, these accounts suggest that coordination is currently achieved through informal networks and programme-level collaboration, with emerging interest in stronger national alignment or more formalised structures.

6.4.3 Funding mechanisms and the role of a Ratepayer Assistance Scheme (RAS)

Some participants identified the proposed Ratepayer Assistance Scheme (RAS), or similar low-interest finance mechanisms, as potential enablers of advice. These were discussed in relation to both improving access to advice and enabling households to act on recommendations.

Participants consistently described lack of capital as a barrier to acting on advice, and low-interest finance as a way to address this, "I guess, the particular barriers that we do hear about, is being able to access finance" (central government, policy). However, several noted that existing finance options, such as bank loans, often have repayment periods that are too short to be effective. The proposed RAS, which would tie finance to a property with longer repayment periods, was seen by some as a significant enabler of action:

> *So, something like the ratepayer assistance scheme that could unlock the affordable finance to be able to improve our homes, would really amplify the impact that we can have in our respective districts, I think. (local government, policy and delivery)*

Views on the implications of a RAS for advice provision were mixed. Some participants suggested that households taking up the offer of a RAS may not need advice or that including an advice component could add cost and reduce uptake. Others saw potential for increased demand for advice, particularly where advisors could support decision-making and build trust in councils. This was also associated with concerns about system capacity. Some participants noted that existing advisor capacity, particularly within council-based programmes, may be insufficient to meet increased demand:

> *…if that Rates Assistance Scheme comes through and takes off next year, that is a big issue because we do need those EDA-level people to mentor everybody else in their regions. And that's just not going to happen at this point... (not-for-profit, advocacy)*

These accounts suggest that while financial mechanisms such as a Ratepayer Assistance Scheme are widely seen as addressing a key barrier to action, their implications for advice provision and system capacity are uncertain.

6.4.4 Digital and data-enabled advice

Some participants referred to digital tools, data use, and hybrid delivery models as emerging enablers of Home Energy Advice. However, references were varied and fragmented, and no shared model of digital delivery emerged. Instead, digital approaches were generally described as a developing area that the current system may need to respond to.

Participants pointed to a range of emerging opportunities, including the use of smart meter and consumption data, digital tools and platforms to tailor information for people, and the potential to extend advice beyond in-person delivery.

> *Once you get the power bill, especially with AI, you can actually look at it and go, 'okay, what's going on here?' You can see abnormal use, under-consumption, over-consumption. There's a lot of potential there. (not-for-profit, advocacy)*

A smaller number of participants described less common or more experimental approaches, including remote delivery of advice and the potential for digital assessments of homes:

> *We started doing virtual visits and now it's like the bulk… it's cheaper. (local government, delivery)*

> *Maybe the first step is just to do it as a digital scan of all houses (not-for-profit, advocacy and delivery)*

Across the interviews, however, digital approaches were consistently framed as complementing rather than replacing in-person advice. Participants emphasised the continued importance of personalised support, particularly for households who need reassurance or more tailored guidance:

> *we're working on a solar comparison tool so that they can just put it in really easily. It is an A I generated tool so they upload the documents and then it compares it all for them, so that that will hopefully be really useful to a lot of people, but you're still going to get the type of person that that needs that reassurance to pick up a phone […] I've tried to choose between the two but I still want to talk this through with someone. (not-for-profit, advocacy)*

Taken together, these accounts suggest that while digital and data-enabled approaches have potential to extend and enhance advice, they are currently understood as supporting, rather than substituting for, relational and personalised delivery.

7 The home energy advice landscape in Aotearoa

This section describes the key elements of the home energy advice landscape that emerged from the research. Figure 22 offers an illustrative model to understand where personalised advice is positioned within a wider system of actors and an evolving landscape of self-guided information and tools. It is based on the results of our desktop research, surveys and stakeholder interviews. The key components of the model are outlined below and further details of each is included in Appendix B.

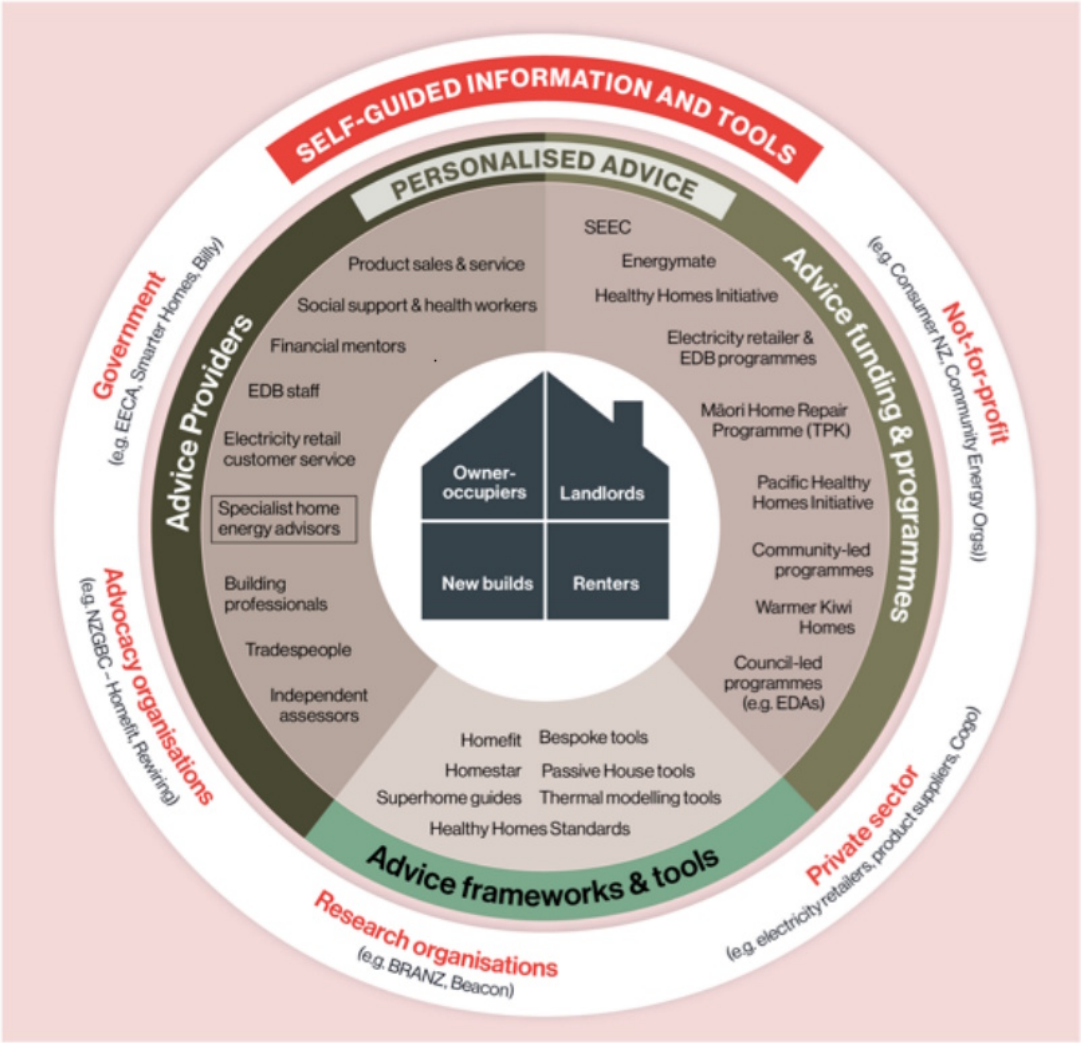


Figure 22: Personalised advice provision within the broader landscape of self-guided information and tools

7.1 Households and homeowners

At the centre of the model are the households and homeowners that directly benefit from home energy advice. This includes owner-occupiers and renters, landlords and people who are planning or commissioning new build homes. They have been situated at the centre of the model because it is their diverse needs that the advice system serves.

Our research did not focus on the make up or needs of households specifically. An assumption of the research was that existing advice services meet needs for advice that households have. We base this assumption on the significant experience of frontline organisations and practitioners, investment by government and other stakeholders in advice programmes, and behavioural research which suggests a role for personalised advice from a trustworthy source to support householder decision making.

Phase Two of this initiative may test these assumptions through direct engagement with households as part of a human centred co-design approach.

7.2 Self-guided information and tools

The outer ring of the circle represents the wide array of self-guided information and tools available to households and homeowners. This ranges from generic information and guides to sophisticated, AI-enabled online tools and calculators that tailor information to the user to varying degrees. These resources form part of the broader information landscape within which personalised advice operates. While some of these resources may direct users to personalised advice services, most do not.

A wide range of organisations provide household-facing information and self-guided tools. We have only referenced examples of reputable information available from different type of system actors (e.g. government, not-for-profit, private sector etc.) encountered through this research. We note that these groups all have different drivers for making information available to households. For instance, the government's new Billy tool (See Appendix B) is designed to help users make informed decisions about changing energy providers, whereas Rewiring Aotearoa's Household Energy Savings Calculator supports decision-making about electrification of homes. These actors also have different capability and capacity to ensure that information remains accurate and up-to-date. For instance, community organisations are likely to have fewer resources than government or private sector actors.

We also note that while some of the information accessible by households is high quality – for example, EECA's website provides broad and credible information about a wide range of household energy efficiency topics - there is no 'single source of truth' for people navigating this information landscape. Instead households are faced with a range of sources of information, some of which may be inconsistent. Not represented on the model, but

nonetheless relevant to a discussion about strengthening outcomes from advice, is a multitude of sales-based and product information, and in some cases misinformation.

The CoGo case study below illustrates one example of a free online tool that provides information tailored to the user. For a full discussion of self-guided information and tools refer to Appendix B.

Case Study 2: Cogo

Cogo has developed an online, self-directed advice platform aimed at owner-occupiers. It is designed to help users explore household and transport electrification options, including solar power, heat pumps and electric vehicles.

The platform includes an energy calculator that provides estimates of upfront costs, bill savings, emissions outcomes and financial payback periods for selected upgrades. Outputs are illustrative and depend on user inputs and underlying assumptions. Features include:

- separate pathways for home and vehicle upgrades, with modifiable inputs such as household size and water heating type
- presentation of upgrade options based on user inputs, including estimated installation costs informed by supplier data, indicative bill savings and projected emissions outcomes
- optional email registration to access additional support, including a technology guide, connections to registered suppliers, quote requests, and live chat or coaching support.

The underlying modelling draws on EECA and Rewiring Aotearoa data, with energy demand estimates reflecting factors such as regional climate, dwelling type and household occupancy.

More than 180 vetted local installers are currently registered on the platform. Cogo intends to maintain multiple suppliers within each upgrade category across all regional council areas. A supplier performance system incorporating customer feedback is under development.

Cogo operates as a private business with commercial relationships with suppliers and partner organisations. Potential future developments identified by Cogo include integration with comparison and switching tools, involvement of Eco Design Advisors and other experts in delivering tailored guidance, and expanded functionality to support low-income households to access grants or subsidies.

7.3 Personalised advice

The inner ring in Figure 18 represents the personalised home energy advice we encountered through our research, and that falls within our original definition in section 2.1.1. In our model we have segmented personalised advice into:

- advice providers

- advice funding and programmes, and
- advice frameworks and tools.

These are the key elements that directly enable the provision of home energy advice to households.

7.3.1 Advice providers

Within the advice provider segment can be seen the diverse range of practitioners we encountered who provide home energy advice as part of their job or, in some cases, on a voluntary basis.

This category includes "specialist home energy advisors", which has been highlighted with a box. Specialist home energy advisors are likely to make up the 19% of our survey sample who said advice was the sole focus of their role. This group, for example, includes trained home performance advisors and Eco Design Advisors. Many home performance advisors and specialist home energy advisors are employed by community organisations focused on improving health and whānau wellbeing, including addressing energy hardship. And many are likely to be members of Community Energy Network, an organisation with an embedded kaupapa of providing home energy advice over several decades (see 3.5.2). The Failoa Famili case study below highlights an example of community-led approach of specialist home energy advice. It is unique among other community-led approaches because of its distinctive Pasifika-led delivery model.

Case Study 3: Failoa Famili

Failoa Famili is a Pasifika-led, values-based community organisation that provides health-focused education and support services, including home energy advice, for Pasifika families.

The Failoa Energy programme delivers home energy advice through in-home assessments, education, practical interventions and advocacy to support households to better understand and manage energy use. Community-based talanoa workshops are also an important component of programme delivery.

The programme primarily serves Pasifika families experiencing hardship in Auckland and Wellington, although services may occasionally be provided in other locations. Many participating households live in social housing or private rental accommodation.

Failoa Famili uses a Pasifika-centred approach grounded in values such as relationships, service and reciprocity. The programme aims to provide culturally safe engagement by matching households with Pasifika language speakers where possible, applying appropriate cultural protocols during home visits, and translating resources into relevant Pasifika languages. Initial visits are generally undertaken by two assessors, supporting engagement, trust and staff safety.

Facilitators and assessors are selected for both their technical capability and commitment to community service. All home assessors complete HPA Principles of Home Performance training as a

foundation. Failoa Famili also aims to have at least one certified Home Performance Advisor in each region to provide technical guidance and support.

Home assessments are often delivered over multiple visits, allowing time to build relationships and provide tailored advice on issues such as moisture, ventilation, heating, insulation and curtain use. Additional support may include advocacy with landlords and energy retailers, assistance with accessing government funding, referrals to other services, and support to navigate electricity plans.

Community workshops delivered through churches and community networks provide opportunities for knowledge sharing, relationship building and referrals into the programme. Failoa Famili also connects families with initiatives such as Warmer Kiwi Homes, Healthy Homes Initiative and Whānau Ora for further support.

Advice providers also include practitioners who provide home energy advice alongside other functions aimed at improving outcomes in homes, including social support workers, health workers and financial mentors.

Within this group are practitioners that are employed by, or have been funded by, the electricity industry. One aspect of this is financial mentors who were funded to provide advice as part of the EnergyMate programme. Within our survey sample, 14% siad they provided advice as part of EnergyMate.. The EnergyMate prgoramme was discontinued during the course of this research and it is uncertain what impact this has had on the role of financial mentors in providing advice. While there was low representation amongst advisors working for electricity retailers or electricity distribution businesses (EDBs) in our survey responses, interviews with sector representatives indicate electricity retailers and EDBs fund home energy advisors in a range of ways. This includes directly employing staff who fulfil advisory roles, providing training to staff in customer service roles - so they can provide elements of home energy advice - and funding community sector organisations with specialist home energy advisors (e.g. CEN members) to provide advice to their customers on their behalf. Low engagement from the electricity sector means it is not possible to quantify the scale of home energy advice funded in this way.

In addition, survey respondents included a broader group of practitioners who self-identified with our definition of home energy advice, including product sales and service providers, building professionals and independent assessors. We have also included tradespeople,as research from EECA found that many plumbers and electricians consider themselves trusted advisors to their clients (EECA & Master Plumbers, 2024). In contrast, building sector organisations consulted during this research generally did not regard advice provision as part of the tradespersons role. We also note the contribution of volunteers to the system with Rewiring Aotearoa reporting several hundred volunteers nationwide providing advice that fits

within scope in relation to electrification, through their Electric Communities initiative.[20] Further details of advice providers can be found in Appendix B.

7.4 Advice frameworks and advisor-led tools

Personalised home energy advice is supported by a range of frameworks, assessment approaches and advisory tools. These resources help practitioners identify household needs, assess home performance, structure advice and communicate recommendations.

Some are linked to specific training programmes and service delivery models (e.g. Homestar, HomeFit and Passive House), while others are used more broadly across the sector and many are bespoke. Many have counterparts in the self-guided information and tools described above and may be adapted for use within personalised advice services. For example, Eco Bulb uses Powerswitch as part of its standard in home assessments and advice.[21]

Survey respondents reported using a range of assessment methods, checklists, calculators and advisory tools developed in-house or adapted to meet the requirements of specific programmes, organisations or target groups. Survey findings indicate that most practitioners use more than one of these frameworks and tools to support the advice they provide. Refer to Appendix B for a complete list.

7.5 Advice funding and programmes

Home energy advice in Aotearoa is delivered through a range of funding arrangements, programmes and service models. These influence who receives support, the type of advice provided, workforce training requirements, and the extent to which advice is integrated with other forms of assistance. The funding and programmes shown in Figure 20 reflect the landscape observed during the research period (2025).

Some programmes are specifically designed to deliver home energy advice (e.g. SEEC), while others incorporate advice alongside broader housing, health, energy hardship or community objectives. Survey responses showed that practitioners deliver advice under a range of programmes and initiative, the most frequent being HHI, HHS, WKH and EnergyMate. We note that of these only HHI provides ongoing funding for advice and EnergyMate was discontinued during the research. Case study 4 outlines the key features of the HHI programme. Notably, HHI requires minimum competency requirements for advisors and funds on-going workforce development and peer learning. Combined with its significance in our sample – 57% said they

[20] https://www.rewiring.nz/communities

[21] https://www.ecobulb.co.nz/

provided advice under the programme – HHI is a significant contributor to advice activity in Aotearoa and workforce capability.

Case Study 4: Healthy Homes Initiative

The Healthy Homes Initiative (HHI) is delivered by a range of providers who work with whānau in their homes, engaging government and local partners to deliver education and enable access to housing-related interventions. It aims to increase the number of people living in warm, dry homes and reduce hospitalisations linked to housing conditions. Health New Zealand Te Whatu Ora is the funder, supporting workforce costs and coordinating national activity.

The programme supports low-income households with children aged 0–19, pregnant people and family members who have been hospitalised with illnesses such as pneumonia, bronchiolitis, rheumatic fever and meningitis. It began in Auckland in 2013 with a focus on rheumatic fever and expanded nationally a decade later with broader health criteria. By December 2025, around 190,000 whānau members had been seen by HHI providers, with 79% identifying as Māori or Pasifika.

Delivery is led by 13 provider organisations, including health, Māori and Pasifika providers and home energy advice services, often working with subcontracted partners and multiple funding sources. Engagement typically involves multiple in-home visits to assess needs and coordinate support. Providers may deliver measures such as heaters, curtains and draught proofing, facilitate access to insulation and heating subsidies and provide education, advocacy and referrals. More than 231,000 interventions were recorded by December 2025.

HHI also includes a centrally coordinated workforce development component. All frontline staff undertaking home assessments complete Home Performance Advisor *Principles of Home Performance* training, with annual refresher training now in place, and some progressing to the more advanced *HPA Certificate course*. Additional training, coaching and shared learning are delivered through regional and national forums, supported by an online knowledge platform and provider forum, to promote consistent practice and knowledge sharing.

HHS uses a commercial delivery model, being advice to landlords about compliance with rental standards and WKH indirectly supports advice by funding insulation and heating. The range of funding and programmes we encountered through our research are discussed in Appendix B.

8 Discussion

8.1 The home energy advice system

The research set out to understand the home energy advice landscape in Aotearoa. To do this we adopted a systems perspective. Rather than focusing solely on individual programmes, organisations and practitioners, it also examined the relationships and interactions between them. The findings show that home energy advice is shaped by a broad network of actors, funding arrangements, policies, tools and institutional settings that influence how advice is delivered and received.

While there is an established workforce for whom home energy advice is a primary function, household decisions are influenced by a much wider range of organisations, professionals and frontline workers whose roles intersect with housing, energy and home performance. Viewing home energy advice as part of this wider system, rather than as a discrete sector, provides a more accurate picture of how households access information and support. This has important implications for how capability, consistency, workforce development and coordination are understood and strengthened.

A small core of home energy advisors operate within a much larger system

The research identified a relatively small core workforce for whom home energy advice is a recognised and intentional function, surrounded by a much larger group of people whose work influences household decisions about homes and energy, as discussed in section 7. Within the core workforce, advice is primarily focused on existing homes, with owner-occupiers and renters representing the largest client groups and new-build clients relatively uncommon within the survey sample. Survey findings also suggest that most core practitioners work directly with households and primarily deliver advice face-to-face in people's homes.

Based on a high-level population sizing exercise drawing on survey data, programme information, training records and stakeholder knowledge, the research estimated that this core workforce comprised approximately 150–200 practitioners in 2025. This estimate should be treated as indicative rather than definitive, reflecting both the absence of a comprehensive workforce register and the difficulty of defining who should be included within scope. The numbers estimate is also highly dynamic, with recent funding and programme changes suggesting core advisor numbers are declining.

Beyond this core we observe a much larger and more diffuse group of people whose work influences household decisions. This includes tradespeople, assessors, product suppliers, customer-facing staff, designers and others who may provide information or recommendations related to housing, energy use and home improvements.

Many who shape household decisions do not identify as advisors

A notable finding was that many groups whose work clearly influences household energy decisions do not regard themselves as providing home energy advice. This includes builders, designers and tradespeople, whose primary role is often understood as providing professional services rather than advice. Stakeholders from the building sector that we consulted generally did not consider advice to be a formal part of these occupations.

However, interview participants frequently described builders, designers, tradespeople and other service providers as important influences on household decision-making and other research (e.g. EECA & Master Plumbers, 2024) shows that some tradespeople do view themselves as important advisors to their clients. These groups often recommend particular products, technologies or approaches and may therefore occupy a quasi-advisory role, even if they do not recognise themselves as part of the home energy advice system. This may also help explain the limited participation of some sectors in the research, as the concept of "home energy advice" did not necessarily align with how these groups understood their own work.

New-build advice forms a distinct but connected part of the system

The research also suggests that advice for households building new homes represents a distinct part of the system, served by a relatively small group of practitioners with different expertise, client groups and delivery models from those focused on existing homes. Survey findings reflected this distinction, with only a small proportion of respondents reporting that most of their clients were building or purchasing new homes.

Because new-build advisors comprised a small proportion of the sample, this part of the system is described less comprehensively than advice relating to existing homes. Nevertheless, the findings suggest that the knowledge, priorities and delivery models associated with new-build advice are not always well connected to those serving existing homes, despite both contributing to household decisions about home performance. Although these services are often viewed as distinct, they draw on many of the same underlying capabilities and can be seen as part of a wider home energy advice system. Greater recognition of these connections may support more consistent messages to households and opportunities for shared capability development across the sector.

Advice is diffuse, with implications for consistency

The presence of a large and varied group of actors influencing household decisions means that home energy advice is diffuse. Participants described households receiving information from multiple sources, some highly specialised and others only indirectly connected to home energy outcomes. Several raised concerns about inaccurate, inconsistent or commercially motivated advice, as well as the difficulty households may face in determining which sources to trust.

The findings do not suggest that a single advisory model is required (or preferable), nor that all actors influencing household decisions should be regarded as home energy advisors. However, they do raise questions about how capability, messaging and coordination might be strengthened across the wider system. Several participants noted that improving household outcomes may depend as much on supporting the broader network of people who influence decisions as it does on developing the recognised home energy advice workforce itself. One participant went further, questioning whether the long-term challenge is to expand the advisory workforce or to strengthen the capability of existing professions, such as tradespeople and designers, to provide more consistent and effective advice.

8.2 Workforce capability

The research identified a small cohort of advisors with significant experience and formal training, although capability appears uneven across the wider system. The practitioner survey was self-selected and drew most strongly from people for whom home energy advice forms a core part of their work, therefore the findings from the survey should not be seen as representative of the wider cohort of people who give advice.

Strong foundations but capability is uneven

Our research suggests that the Home Performance Advisor training programme operates as a de facto training standard for those who identify as home energy advisors, with 65% of survey respondents reporting they have completed HPA *Principle of Home Performance* training, and 40% reporting have completed HPA *Certificate of Home Performance*. This is reinforced within some funded programmes, such HHI (see Case Study 4), where all frontline staff undertaking home visits are required to complete a specified level of HPA training. However, we understand that HPA is not universally recognised across the wider system (beyond core practitioners and some funders), with anecdotal reporting of little or no awareness of HPA training in some parts of the system (e.g. building professionals).

Sector capability goes beyond technical expertise. Respondents also drew on a broader base of competence, with 26% citing professional experience in construction and property, 18% citing lived experience of cold or unhealthy housing and 16% holding other tertiary qualifications. Interview participants described effective advice as fundamentally relational and dependent on trust, with one summarising it as communication that is roughly ninety percent how you say things and ten percent what you say. The literature on advice effectiveness supports this emphasis, identifying personalised advice from a trusted and credible source as central to changing household decisions.

No minimum standards govern who can give advice

There are no minimum training requirements governing who can provide home energy advice, although some funders have specified HPA training requirements for the programmes they

support. Interview participants described requirements operating at a programme level, or within organisations which may set internal competency requirements of their own. The lack of formalised training requirements, accreditation or standards for advisors is a cause of concern for many in the sector and contributes to variations in advice quality and messaging. A particular concern raised by many participants in the research is the lack of minimum standards for people providing HHS assessments, who do not require any formal training or accreditation. One participant expressed this risk by observing that a person with no relevant background could be "a postie today" and begin assessing rental properties tomorrow.

Individual organisations have created their own requirements, but these are neither universal nor consistent. Eighty percent of manager survey respondents said their organisation set minimum training requirements, with most attributing those requirements to a mix of funder rules and internal policy. The standards that exist therefore depend on which organisation an advisor works for, which contributes to variation in advice quality and messaging. However, while many participants called for stronger and more consistent minimum standards, others cautioned that higher thresholds for accreditation would add cost and create barriers to entry. This suggests trade-offs between quality / effectiveness and cost need to be carefully considered.

The system relies on advisors to maintain their own capability

Beyond some minimum training, there is an absence of professional development pathways with advisors relied upon to keep their own knowledge and skills relevant. Interview participants close to frontline delivery described a lack of structured opportunities to maintain capability, with one reflecting that some of the knowledge would be getting out of date and others naming funding, time and provider capacity as constraints. The practitioner survey reinforced this finding, with participants reporting that keeping their knowledge current was largely self-driven. In contrast, the HHI now provides annual refresher training for its frontline staff.

The reliance on self-directed learning places a substantial burden on a workforce in which 81% of practitioner respondents reported that home energy advice is not the sole function of their role. This requires practitioners to balance keeping current with their knowledge in home energy advice, alongside training requirements for other functions as well as delivery requirements.

A further factor that is likely to impact future workforce capability is that the cohort of advsiors in our survey tended to be older. Almost three quarters of survey respondents (74%) were over 40 and only 8% were under 30. While this may mean advisors bring considerable professional and life experience to the role, it raises questions about long-term workforce capability.

Capability gaps emerging in electrification and changing technologies

Even amongst trained and experienced practitioners, the research identified capability gaps, especially relating to emerging areas such as electrification and new technologies. This is a significant challenge for the sector given the current focus on electrifying homes. Interview participants spoke about the potential implications of the proposed Ratepayer Assistance Scheme both on advisor capability and of the capacity of the current workforce to repond to a predicted increase in demand for advice. Further evidence of this policy direction has emerged in the lead-up to the 2026 general election, when at least four political parties have proposed policies designed to encourage the uptake of solar and household electrification.[22]

Interview participants identified weaknesses in advising on electrification, solar and batteries and in helping households weigh costs, benefit and payback periods. The survey echoed this concern, with practitioners naming solar, the transition to electric solutions and regular updates on new legislation among the training gaps they most wanted addressed. Participants also raised gaps relating to advisor wellbeing and de-escalation, a need that managers confirmed when they listed cultural sensitivity, de-escalation and report writing among their own training priorities.

These gaps give support to the importance of professional development pathways and structured capability refreshers as they demonstrate the current approach (self-directed capability) is not keeping pace with the speed of change in technology in the energy sector.

Overall, the evidence supports a view that the sector has strong capability building blocks, including formal training options, and pockets of deep experience. But further work is needed to consider how to support capability across the system particularly in terms of professional development and emerging technical areas.

Funding instability causes capability loss

A further structural cause of capability loss sits with the system funding streams. Because home energy advice is so dependent on programme funding, advisors move into and out of the field as programmes are established, expanded or discontinued. The experience and contextual knowledge those advisors carry does not transfer when they leave, and although some may return at a later point or are replaced by new advisors, the system loses capability as a result. This structural dynamic limits what impact investment in workforce development can achieve in the absence of a more stable funding and operating model.

[22] National Party, Labour Party, Green Party, Opportunity Party.

8.3 Funding models shape delivery and sustainability

Home energy advice in Aotearoa is delivered through a diverse range of direct and indirect funding arrangements, including government-funded programmes, local government initiatives, philanthropic funding, fee-for-service activities and contributions by volunteers. These funding models influence who receives support and the types of advice provided. The research found that many home energy advice services have developed in response to specific policy objectives or funding opportunities, contributing to the diversity of delivery models described throughout this report.

Dependence on programme-based funding

The findings suggest that much of the established home energy advice system remains dependent on government-funded programmes and contracts. Survey responses and stakeholder interviews highlighted the significance of initiatives such as HHI, Warmer Kiwi Homes, SEEC and community-based programmes supported through local or central government funding. These programmes have played an important role in developing workforce capability, supporting service delivery and reaching households that may not otherwise have access to advice.

Participants noted that programme funding often enables organisations to work proactively with households experiencing poor housing conditions, energy hardship or other challenges. However, funding arrangements are frequently tied to specific objectives, eligibility criteria or time-limited contracts, which can influence both the scope of advice provided and the households reached. This contributes to variation in service delivery across the system and can make it difficult for organisations to plan beyond the life of individual funding streams.

The research was undertaken during a period in which several services contracted, including reductions in funding, programme changes and the scaling back or closure of some services (e.g. EnergyMate). While our research does not provide a comprehensive picture of national provision, concerns about funding were consistently raised by stakeholders and provide important context for concerns about workforce retention, capability loss and the long-term sustainability of service delivery. These concerns were particularly notable given the increasing complexity of household energy decisions and the emergence of new areas of demand described elsewhere in this report.

Funding instability affects capability and continuity

Stakeholders consistently identified funding uncertainty as a challenge for the long-term sustainability of home energy advice services. Participants described the effects of programme changes, short-term contracts and shifting policy priorities on workforce stability, organisational planning and service continuity. The implications extend beyond individual organisations. Funding instability contributes to workforce turnover, reduced opportunities for professional development and difficulties retaining experienced practitioners. This may be

particularly challenging in a relatively small workforce, where the loss of experienced advisors can have a disproportionate effect on capability across the wider system. While funding pressures are not unique to home energy advice, the findings suggest they remain an important factor shaping both the availability and consistency of services.

Home energy advice is relevant to diverse stakeholders

A recurring theme across the research was that the outomces that arise from home energy advice have value beyond the households receiving support. Participants linked advice to improved health and wellbeing, reduced energy hardship, greater energy efficiency, support for electrification decisions and climate adaptation. These outcomes align with the interests of multiple public, private and community-sector organisations, many of which already fund, deliver or influence aspects of the home energy advice system.

While this research did not assess the viability of particular funding models, stakeholders consistently identified the long-term sustainability of funding as a concern. Given the range of organisations and sectors that may benefit from the outcomes that can be supported by home energy advice, future work could usefully explore whether current funding models adequately reflect the value of home energy advice to the range of relevant system actors.

8.4 Delivery models

Digital tools support decision making but do not substitute for personalised advice

Digital tools, online calculators and other self-guided resources have expanded the range of information available directly to households. Participants also identified emerging opportunities to use smart meter data, digital platforms and AI-enabled tools to provide more tailored advice at scale and extend support beyond traditional in-person settings.

However, participants consistently described these tools as complementing rather than replacing personalised advice. Effective advice was seen as fundamentally relational, relying on an advisor's ability to build trust, understand household circumstances, provide tailored guidance and support households over time. This aligns with research showing that advice outcomes are influenced not only by the information provided, but also by the credibility of the advisor and the way advice is delivered.

While digital tools can improve access to information and support some household decisions, they are likely less able to meet the needs of households experiencing energy hardship, those with limited digital literacy, people for whom English is not a first language, and households navigating complex financial or technical decisions. Digital delivery may therefore broaden access to advice for some households, but is unlikely to substitute for personalised support.

The system has no shared logic for how different forms of advice should work together

The growth of digital advice provision has created new opportunities for households to access information without interacting directly with an advisor. However, it appears that different forms of advice operate largely in parallel, with little shared understanding of which approaches are most appropriate for different household needs or how households should move between them. We found no evidence of a common framework for determining when digital information is sufficient, when personalised advice is needed, or how households requiring additional support should be identified and referred.

As a result, the expansion of digital provision risks increasing the range of available advice without necessarily improving how households navigate the system. While some households may be well served by self-guided tools, others may require trusted, ongoing support to act on information and make complex decisions. A more deliberate approach to integrating different forms of advice could help ensure households receive support that matches their circumstances and needs.

Proposals for coordination offer partial responses to an unsolved structural problem

The research found recurring discussion about the potential value of greater coordination across the home energy advice landscape. Ceveral participants called for stronger mechanisms to connect practitioners and organisations, including a national association or similar coordinating body to support networking, workforce development, information sharing and collective representation. This included proposals for a Community Network Initiative as a mechanism that could support local delivery while providing a single point of connection for government and other stakeholders. These proposals align with earlier calls for greater coordination, including those made by the Energy Hardship Expert Panel.[23]

None of these proposals had progressed to funded implementation at the time of the research, and this study did not assess their likely effectiveness. Their significance lies less in the specific solutions proposed than in what they reveal about participants' views of the current system. Taken together, they suggest a shared recognition that coordination, funding continuity and service fragmentation remain unresolved challenges. More fundamentally, they point to an ongoing question about how advice providers, support services, funding mechanisms and households can be better connected as household energy decisions become increasingly complex and consequential.

[23] The Energy Hardship Expert Panel recommended that Community Network Network should be mandated and funded as a community energy wellbeing network (Recommendation CE1 https://www.mbie.govt.nz/assets/energy-hardship-the-challenges-and-a-way-forward-energy-hardship-expert-panel-report-to-minister.pdf)

8.5 Capability and capacity to serve diverse communities

A recurring theme throughout the interviews, supported by survey responses, was the importance of having the capability and capacity to work effectively with different communities, particularly Māori, Pasifika and new migrants. This is particularly relevant given the disproportionate likelihood that these population groups will live in cold, damp housinggroups (Statistics New Zealand, 2020).

Effective advice depends on trust and cultural capability

Interview participants described effective home energy advice as fundamentally relational, often requiring advisors to be welcomed into people's homes and develop trust over time. Survey findings support this perspective, with practitioners identifying time constraints and relationship-based engagement as challenges in their work.

Several participants linked trust to cultural and language capability, suggesting that advice may be more effective when advisors understand the cultural context and lived experiences of the households they are working with. Survey results showed that almost all practitioners delivered advice in English, while a smaller proportion were able to deliver advice in te reo Māori or other languages. These findings suggest that language capability may be limited in some parts of the workforce, with some organisations relying on interpreters or other support mechanisms when working with diverse communities.

Workforce diversity and representation

Participants expressed a range of views about the importance of workforce diversity. Some argued that increasing the number of Māori and Pasifika advisors would strengthen the ability of services to work effectively with those communities, while others emphasised that advisors from any background can work successfully with Māori and Pasifika households when appropriate relationships, cultural competence and ways of working are in place.

Within the survey respondent group, 23% of advisors identified as Māori and 12% as Pasifika, proportions that are higher on a population basis than those recorded in the 2023 Census. However, the survey was not designed to be nationally representative, and the results likely reflect the target groups for the funded programmes under which the survey respondents most commonly worked (e.g. HHI and WKH). As a result, the findings cannot be used to draw conclusions about the composition of the wider home energy advice workforce. Nonetheless, participants across the research identified workforce diversity, cultural capability and representation as areas that warrant ongoing attention.

Some participants also questioned whether existing training materials and professional development opportunities adequately reflect Māori and Pasifika perspectives and ways of working. These concerns were raised by a relatively small number of participants but suggest opportunities for future consideration as the workforce and advice system continue to evolve.

Representation in leadership and decision-making

Participants extended questions of representation beyond frontline delivery to leadership and decision-making across the wider system. Several argued that initiatives intended to support Māori and Pasifika communities are more likely to be effective when those communities are involved in shaping priorities, approaches and governance arrangements. Participants pointed to existing examples of partnership-based approaches and discussed the potential value of greater Māori and Pasifika leadership within the home energy advice landscape.

These findings suggest that questions of equity and inclusion extend beyond who receives advice or who delivers it. Participants highlighted the importance of considering whose perspectives influence programme design, funding decisions and system development. While the research did not attempt to evaluate different governance models, it identified leadership, representation and cultural capability as factors that some stakeholders considered important to the future effectiveness of home energy advice services.

8.6 The system has not connected different drivers of advice

The research suggests that home energy advice in Aotearoa has historically often developed around health and energy affordability objectives, while emerging drivers such as electrification and climate resilience may be creating new sources of demand. These priorities are often complementary rather than competing. However, they have largely evolved through separate programmes, funding arrangements and organisational networks. Our findings suggest there may be limited connection between these different drivers of demand and the responses, despite many addressing overlapping household needs.

Established provision centres on health and affordability

Community-focused and established home energy advice providers are primarily concerned with improving household health and wellbeing and responding to energy affordability pressures. This focus reflects both the historical development of the field and the programmes through which advice has most commonly been funded, including HHI and Warmer Kiwi Homes. Survey findings support this interpretation. More than half of practitioner respondents (57%) reported providing advice through the HHI, while cold homes, internal moisture and energy efficiency were the most common reasons households sought support. Managers similarly identified energy wellbeing and improved health as the leading reasons their organisations provide advice. Together, these findings suggest that health and affordability currently remain the dominant drivers of home energy advice activity in Aotearoa.

Electrification is creating new demand for advice and raises equity questions

Interview participants consistently described electrification as a significant trend that is increasing the complexity of household decisions about heating, hot water, transport and

onsite energy generation. Participants anticipated growing demand for advice to help households understand emerging technologies and weigh up costs, benefits and trade-offs, especially if a Ratepayer Assistance Scheme (or similar policy) is progressed. Electrification was frequently discussed not only as an environmental issue, but also as a potential pathway to lower household energy costs.

Participants also identified a number of questions and concerns associated with this transition. Several raised potential equity issues, noting that households with limited financial resources may face barriers to participating in electrification or accessing its potential benefits. Others cautioned that advice focused on electrification should not overlook more immediate housing issues such as insulation, moisture management and thermal performance. These concerns suggest areas that may warrant further attention as electrification becomes a more prominent feature of household energy decision-making and when considering future system design.

Climate adaptation and resilience could generate new demand for advice

Climate adaptation and resilience emerged as a potential future driver of demand for home energy advice, particularly among participants from local government, banking and insurance organisations. These participants described increasing concern about climate-related risks to households, including flooding, extreme weather events and energy system disruptions. Some saw a potential role for household-focused advice in helping people understand and respond to these risks.

Perspectives differed on the extent to which adaptation and resilience challenges should be addressed through household-level interventions as opposed to broader community or system-level responses. Nevertheless, many participants identified at least some role for household advice and support. At present, there are no dedicated resilience-focused advice services in Aotearoa. The findings therefore suggest that climate adaptation and resilience represent a possible future area of demand rather than an established component of the current advice system.

Different drivers of home energy advice not yet viewed as part of the same system

While health, affordability, electrification and climate resilience are often discussed separately, the research suggests that they are connected through their effects on households and homes and by the workforce providing advice. Stakeholders working across these areas did not generally describe themselves as part of a single, connected system, and the funding arrangements, delivery models and organisational structures associated with each have largely evolved independently. Several participants identified this lack of systemic thinking as a challenge and pointed to opportunities for greater coordination and alignment.

The findings suggest that many interventions are capable of contributing to multiple objectives simultaneously. For example, improving insulation may support health, comfort, energy

affordability and emissions reduction outcomes, while some electrification investments may also contribute to resilience and reduced energy costs. However, these connections are not always reflected in the way advice services are funded, organised or delivered. The research does not identify a preferred model for addressing this issue. Rather, it suggests that future work could usefully explore how different drivers of demand, funding streams and delivery approaches relate to one another, and whether greater alignment may improve outcomes for households.

8.7 Limitations

This research provides the first known attempt to systematically describe the home energy advice landscape in Aotearoa New Zealand. It was designed as an exploratory study intended to map the diversity of organisations, practitioners, delivery models and stakeholders involved in home energy advice and to identify emerging issues, opportunities and trends. As such, the findings should be interpreted in light of several limitations.

Scope and definition

A key challenge for this research is that there is no widely accepted definition of home energy advice in Aotearoa, nor any agreed boundaries around who should be considered part of the home energy advice workforce or system. The study adopted a deliberately broad definition in order to capture the range of activities, organisations and practitioners influencing household decisions about homes and energy. While this enabled consideration of a wide system of actors, it also means some readers may reasonably draw different conclusions about who should be included within scope. The broad definition may also have influenced participation, particularly among practitioners and organisations who provide advice that falls within the study definition but do not identify themselves as home energy advisors.

Survey sample and representativeness

The practitioner and manager surveys were distributed through sector networks and relied on voluntary participation. As there is no central register of home energy advisors or organisations providing home energy advice, it was not possible to determine the size or characteristics of the overall population, calculate response rates, or draw a representative sample. Survey findings should therefore be interpreted as indicative rather than representative of the entire home energy advice landscape.

Responses were concentrated among practitioners working in not-for-profit, government-funded and established advice delivery models. Participation from some segments that the research team expected to encounter, including the electricity sector, commercial providers, building industry professionals, and practitioners primarily focused on new-build housing, was comparatively limited. This may reflect both the recruitment pathways available to the research team and differing interpretations of whether participants considered themselves

part of the home energy advice landscape. As a result, some aspects of the system are likely to be less fully represented than others.

Interview sample

Stakeholder interviews used purposive sampling to ensure participation from organisations with relevant knowledge, experience and perspectives. While this approach is appropriate for exploratory qualitative research, it is not designed to produce statistically representative findings. Participants were selected because of their ability to provide insight into the research questions and, in many cases, already had an established interest in home energy advice or related issues. Consequently, the interview findings should be understood as reflecting informed perspectives rather than representing the views of all organisations with an interest in homes, energy, housing quality or related policy areas.

Interpretive and forward-looking findings

Some findings reported in this study relate to emerging trends, future opportunities and potential risks identified by participants. Topics such as electrification, climate adaptation, resilience, artificial intelligence and future operating models were discussed primarily through stakeholder perceptions. These findings are included because they provide useful insight into how participants understand future directions and areas of potential change and should be interpreted as such.

Estimating workforce size and system scale

The research includes indicative observations about the scale of the home energy advice workforce and the broader ecosystem of actors who influence household decisions. These observations were developed through triangulation of survey responses, interview data, programme information, training records and stakeholder knowledge. However, in the absence of a comprehensive register, workforce dataset or agreed definition of who should be counted, any estimates should be treated as indicative rather than definitive. One of the findings of this research is that the boundaries of the workforce itself remain unclear.

Implications for interpretation

Despite these limitations, the consistency observed across the literature review, survey findings and stakeholder interviews provides confidence in several core conclusions. In particular, themes relating to the relational nature of effective advice, fragmentation of delivery, workforce capability needs, funding instability and increasing complexity of household energy decisions emerged across multiple data sources and participant groups.

9 Conclusions

Home energy advice is an established practice supporting household action to improve homes

Home energy advice is a well-established practice in Aotearoa and internationally, supported by a substantial body of research and significant existing capability. It is one mechanism through which households can be supported to improve their homes, reduce energy costs, navigate complex decisions and take action. Across both the literature and our research, advice was found to be most effective when tailored to household circumstances, delivered by a trusted source and connected with practical support. As household decisions become more complex, the role of trusted personalised advice as an enabler of household action may become increasingly important.

Aotearoa has significant home energy advice capability, but it is dispersed across a fragmented and poorly connected system

This research identified a substantial foundation on which to build. Aotearoa already has established advice practitioners, delivery organisations, programmes and training pathways supporting home energy advice. Together, these contribute to a capable core workforce and a diverse range of services that support households to improve their homes and navigate energy-related decisions.

However, these elements have largely developed through separate programmes, funding streams and in response to different drivers. As a result, capability, knowledge, funding and service delivery are distributed across a broad range of organisations and sectors that are not always well connected. Many individuals and organisations that influence household decisions about homes and energy do not necessarily recognise themselves as part of a wider home energy advice system, despite playing an important role in shaping household outcomes.

The research also saw no evidence of a shared understanding of how different forms of support should complement one another. Digital tools, household-facing information, community-based services, specialist advisors and other forms of support have largely evolved independently. While each may be effective in particular circumstances, there does not appear to be a shared logic about which households are best served by different approaches, how households should move between them, or how different forms of support should work together as part of a coherent system.

This fragmentation does not necessarily indicate a lack of capability. Rather, it suggests that opportunities exist to improve coordination, increase the effectiveness of existing services and make better use of limited resources. In an environment where funding is constrained and household needs are becoming more complex, how existing capability is connected and where it is targeted may become increasingly important.

Effective home energy advice is relational, not simply technical

The research consistently found that effective home energy advice is not simply a technical activity. While technical knowledge provides the foundation for good advice, participants consistently described effective advice as requiring the ability to build relationships, understand household circumstances and communicate in ways that are credible, relevant and actionable. This finding aligns with the literature review, which suggests that advice is most effective when delivered by a trusted source and connected with practical support.

The research also highlighted the importance of cultural capability and representation, particularly when working with Māori and Pasifika, and underserved communities. Together, these findings suggest that effective home energy advice relies on a combination of technical, relational and cultural capability.

This has implications for how different forms of support are understood and deployed. While digital tools, household-facing information and personalised advice can all contribute to household decision-making, the research suggests that effectiveness cannot be assessed solely in terms of the information provided. The ability to build trust, support understanding and enable action may be equally important considerations when designing services and allocating resources.

There is no consistent system-wide approach to sustaining capability

The research identified a capable and experienced core workforce, supported by established training pathways and practical experience accumulated over many years. However, capability does not appear to be supported consistently across the wider system. Training requirements vary between organisations and programmes, there are no universal minimum competency requirements, and ongoing professional development is often self-directed.

Participants identified capability gaps in several areas, particularly around electrification, emerging technologies, household financial decision-making and cultural capability. At the same time, many advisors reported maintaining their knowledge through independent study and peer networks rather than structured professional development.

The findings also suggest that capability should be considered more broadly than the recognised home energy advice workforce. The research identified a wide range of organisations, professions and customer-facing roles that influence household decisions about homes and energy, yet many do not recognise themselves as part of a wider home energy advice system. This raises questions not only about capability within the specialist workforce, but also about where capability sits across the wider system and how it can be maintained and strengthened over time.

The system has not connected the different drivers of home energy advice

The research found that home energy advice is associated with a growing range of objectives, including improving housing quality and health outcomes, addressing energy hardship, supporting electrification and helping households respond to climate-related risks. While these drivers are often discussed separately, many are connected through their effects on households and through the actions required to address them.

However, these interests have largely developed through (or into) separate programmes, funding streams and stakeholder networks. The research found limited evidence of a shared understanding of how different objectives, delivery models and sources of funding relate to one another, despite often seeking complementary outcomes. Many organisations and sectors that influence household decisions, or that may benefit from improved household outcomes, do not necessarily recognise themselves as part of a wider home energy advice system.

This is particularly relevant given the increasing complexity of household decision-making. Rising energy costs, electrification, climate adaptation and resilience were identified as factors creating new pressures and opportunities for households, while also attracting interest from a wider range of organisations. Yet the capabilities, relationships and delivery models associated with these issues have largely developed in parallel.

Taken together, the findings suggest that an important challenge for the future is not only how home energy advice capability is sustained, but how existing and emerging interests are recognised and better aligned around the outcomes that home energy advice can support.

10 Next steps

This report was conceived as the first phase of a two-phase initiative to better understand and support the development of home energy advice in Aotearoa. While the research highlights areas where the current system appears fragmented or under pressure, it also identifies considerable strengths. The findings do not point to a single solution. Rather, they provide an evidence base from which stakeholders can consider how existing capabilities, services, tools, funding streams and relationships might be better connected and supported. Subject to future investment and stakeholder interest, a second phase of work would build on these findings through a collaborative co-design process to explore and test potential approaches for strengthening the home energy advice system.

The questions below are therefore not recommendations arising from this research, nor a proposed agenda for future work. Instead, they are illustrative examples of the types of strategic questions that emerge from the findings and may warrant further consideration. The development and refinement of "How might we...?" questions are more appropriately undertaken through the discovery and co-design activities of a potential second phase, in partnership with practitioners, service providers, households, funders and other stakeholders. They are included here simply to indicate some of the directions the findings suggest may be worthy of further exploration.

- How might we create a more coordinated and effective home energy advice system while building on existing strengths?
- How might we support households to navigate increasingly complex decisions about energy, housing, electrification and resilience?
- How might the benefits and costs of supporting home energy advice be shared across the actors that stand to gain from better housing, health, energy and climate outcomes?
- How might we establish a more enduring funding model for advice services?
- How might we ensure the right households receive the right type of advice at the right time?
- How might digital, data-enabled and AI-supported services complement trusted personalised advice?
- How might we strengthen workforce capability while maintaining accessibility and reach?
- How might future governance and coordination arrangements support greater consistency, collaboration and system effectiveness?

Glossary – Acronyms

- EDA – Eco Design Advisors
- EECA - Energy Efficiency and Conservation Authority
- HHI – Healthy Homes Initiative
- HHS – Healthy Homes Standards
- HPA – Home Performance Advisor Ltd
- MBIE – Ministry of Business, Innovation and Employment
- NZGBC –- New Zealand Green Building Council
- SEEC – Support for Energy Education in Communities fund
- TPK – Te Puni Kōkiri
- WKH – Warmer Kiwi Homes

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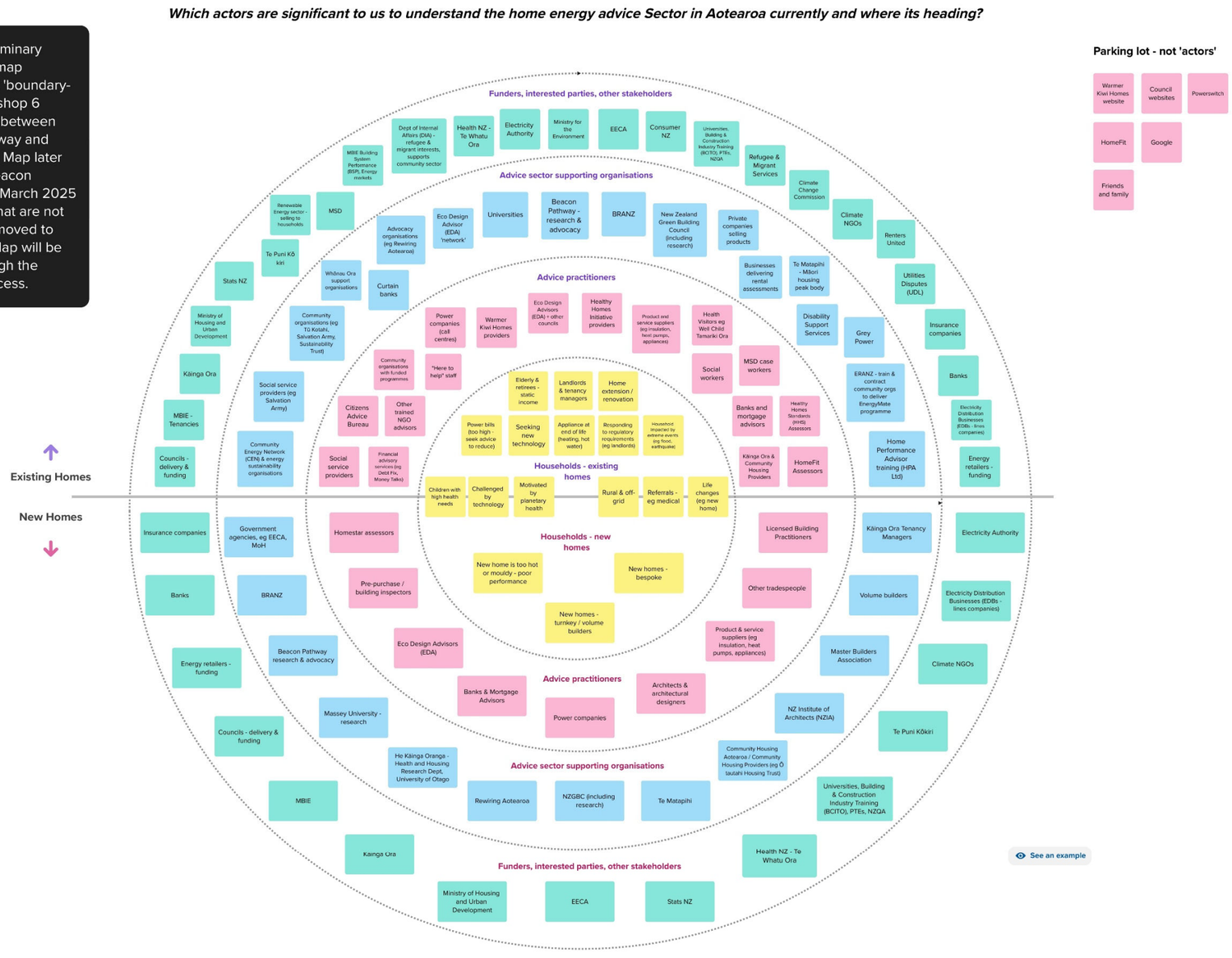
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Appendix A: Preliminary system actor map

Method: Preliminary sector actor map developed at 'boundary-setting' workshop 6 March, 2025 between Beacon Pathway and Allen+Clarke. Map later refined by Beacon project team March 2025 incl. entries that are not actors were moved to parking lot. Map will be refined through the research process.



Appendix B: The Home Energy Advice landscape in Aotearoa

Self-guided information and tools

A wide range of organisations provide household-facing information and self-guided tools intended to support decisions about homes and energy. For the purposes of this review, we have focused on broad categories of organisations that households are most likely to encounter and consider credible. Most of the resources identified are free to access and require households to locate, navigate and apply the information themselves. These include:

- government
- not-for-profit organisations
- mission-driven organisations
- private sector organisations
- research organisations.

Most of the information and self-guided tools identified through the desktop review are available online through websites and digital platforms.

Government

- **EECA** provides public-facing information, tools and calculators related to home energy efficiency and energy upgrades. Resources include information on energy use, heating, insulation, appliances and renewable energy options, as well as links to support organisations and other tools, including Billy.
- **Electricity Authority – Billy** is an online tool that provides information to support household energy decision-making, including comparing electricity plans and understanding energy use.
- **MBIE – Smarter Homes Guide** provides information for people building, renovating or purchasing a home. Topics include site selection, design, construction materials, moisture and ventilation, water use, energy use, lighting, heating, cooling and insulation.
- **MBIE Tenancy Services – Healthy Homes Standards** provides information on Healthy Homes Standards for rental properties, including regulatory requirements and guidance for landlords.
- **Eco Design Advisor (EDA)** provides online information and resources on home performance, energy efficiency, healthy homes and sustainable housing. The website is available nationally, while personalised Eco Design Advisor services are offered by a limited number of councils.

Not-for-profit

- **Consumer NZ** is a not-for-profit membership organisation that provides consumer information, product reviews and advice across a range of topics, including housing and energy. Content is available through a combination of freely accessible and subscription-based resources. Consumer NZ hosts Powerswitch, an electricity plan comparison tool
- **Community Energy Network (CEN)** is a registered charity and peak body representing organisations working in areas such as energy hardship, healthy homes, community resilience and sustainability. At the time of writing, CEN had 22 member organisations located throughout Aotearoa. Member organisations undertake a range of activities, including advice services, workshops, education programmes and community engagement. Some members provide services in partnership with electricity retailers.
- **Environment centres** provide information and resources on a range of environmental topics, including home energy use, healthy homes, waste reduction and sustainable living. Information may be provided through websites, community events, workshops and volunteer networks. One example is EcoMatters.

Mission-driven organisations

- **New Zealand Green Building Council (NZGBC)** is a membership organisation involved in advocacy, training, certification and education related to sustainable residential and commercial buildings. NZGBC's HomeFit tool provides an online self-assessment for existing homes, generating recommendations across areas such as insulation, heating, ventilation and energy efficiency. A certified HomeFit assessor can also do an onsite assessment and provide advice to households. NZGBC also administers the Homestar rating tool for new homes and renovations. Homestar is a voluntary rating tool that assesses the performance of new builds and major renovations against a range of sustainability and quality criteria.[24] Homes are rated on a scale from 6 to 10 stars, with higher ratings indicating higher performance. Assessments are undertaken by accredited Homestar professionals and certification is administered by NZGBC.[25]
- **Passive House Institute New Zealand (PHINZ)** is a membership organisation that provides training, certification, research and public information relating to high-performance buildings and the Passive House standard. It also provides resources for professionals and households interested in building performance and energy efficiency.
- **Superhome Movement** is a charitable trust that provides information and educational resources on home design, building performance and housing quality. Its work focuses on the relationship between housing, health and environmental outcomes.

[24] https://www.homestar.org.nz/whatishomestar-

[25] https://www.homestar.org.nz/findaprofessional

- **Rewiring Aotearoa** is a registered charity that provides information, tools and resources related to household and business electrification. Resources include information on technologies such as solar generation, electric vehicles, electric appliances and home energy use.

Private sector

- **Electricity retailers** provide household-facing information and resources related to energy use, energy efficiency and managing household energy costs. Some retailers also refer customers to home energy advice services or community-based support programmes, including services delivered by Community Energy Network member organisations.
- **Banks** provide information and tools related to home energy efficiency, sustainable home improvements and financing options for upgrades. Many banks offer lending products for activities such as installing insulation, heating, ventilation, solar generation, electric appliances and electric vehicles. Information is typically provided through websites, calculators and online guidance designed to support household decision-making. Some banks also link customers to digital tools and calculators that provide personalised estimates of energy savings, costs and emissions outcomes associated with home improvements. One example is ASB Better Energy, which uses the Cogo platform to provide tailored household information and recommendations. ASB Better Energy

Research Organisations

- **BRANZ** provides research-based information and resources on housing, building performance and home improvement. Resources are available through websites such as *Level*, which provides guidance on topics including building design, home performance, energy efficiency, moisture management and renovation. BRANZ also provides training and learning opportunities and undertakes research relevant to housing quality, home performance and energy use. BRANZ communicates information through websites and diBeacon Pathjgital channels, including social media.
- **Beacon Pathway** is an incorporated society that undertakes research and demonstration projects related to housing and neighbourhood sustainability. It provides household-facing information and resources derived from its research, including guides, manuals and information sheets on home performance, energy efficiency and healthy homes.

Advice providers

- **Specialist home energy advisors** are practitioners for whom home energy advice is the primary or a significant focus of their role. This group includes specialist advisory roles

such as Home Performance Advisors and Eco Design Advisors, as well as some Healthy Homes Initiative navigator roles where home energy advice forms a substantial component of service delivery. CEN members frequently employ home energy advisors. It also includes self-employed practitioners whose primary professional activity is the provision of home energy advice.

- **Social support and health workers** provide home energy advice alongside broader housing, health and wellbeing support functions. This group includes practitioners delivering programmes such as the Healthy Homes Initiative and, in some cases, Whānau Ora services. Home energy advice may be provided alongside activities such as social support, advocacy, curtain bank services, referrals and service coordination, depending on the role and organisation involved.
- **Financial mentors** are practitioners whose primary role is to provide budgeting advice and financial mentoring. Some also provide home energy advice, particularly in relation to household energy use, energy efficiency and energy costs. Fincap is a national charity that supports financial mentors throughout Aotearoa through training, resources and referral services. Financial mentors were also involved in the EnergyMate programme, where home energy advice was provided alongside financial mentoring and support for households experiencing energy hardship; however, the programme concluded at the end of 2025. Fincap
- **Product sales and service providers** operate through both commercial and social enterprise models. This category includes registered Warmer Kiwi Homes assessors and installers, solar providers, and businesses offering products and services such as insulation, heating, glazing and appliances. For some providers, information and advice form part of the service offered to households, alongside the supply, installation or assessment of home performance improvements.
- **Electricity retailer staff** provide some advice and guidance to customers that falls within the scope of this research. Interview participants indicated that this can include customer service staff with a basic capability to provide information, identify customer needs and refer customers to other sources of support, as well as a small number of staff with more specialised home energy advice capability. Some electricity retailers also fund community organisations to deliver home energy advice services to their customers.
- **Electricity distribution businesses (EDBs)** support a range of programmes and initiatives focused on energy hardship, energy efficiency and community engagement. A small number employ staff who provide home energy advice directly to households, while others fund community organisations, social service providers or specialist advice services to deliver home energy advice on their behalf. In these models, home energy advice is often delivered alongside broader objectives relating to community wellbeing, energy affordability and customer engagement.
- **Building professionals** such as architects, architectural designers, sustainability consultants and other housing professionals may provide home energy advice as part of their work with clients. While many of these practitioners would not necessarily

identify themselves as home energy advisors, they may provide advice and guidance that falls within the scope of this research. Those with a particular interest in high-performance homes may also be associated with organisations such as NZGBC, PHINZ or the Superhome Movement and hold qualifications or certifications offered through these organisations.

- **Building professionals** such as architects, architectural designers, sustainability consultants and other housing professionals may provide home energy advice as part of their work with clients. While many would not necessarily identify themselves as home energy advisors, they may provide advice and guidance that falls within the scope of this research. Those with a particular interest in high-performance homes may also be associated with organisations such as NZGBC, PHINZ or the Superhome Movement and hold qualifications or certifications offered through these organisations.
- **Tradespeople** such as plumbers and electricians may provide advice and guidance to households as part of their interactions with clients. Research commissioned by EECA has found that some plumbers and electricians consider themselves to be trusted advisors on household energy-related decisions. For this reason, we consider that some of the advice provided by these tradespeople falls within the scope of this research. Consultation undertaken as part of this study found that building sector organisations generally did not consider builders and other construction trades to be home energy advisors. However, it is likely that some advice provided in the course of client interactions would fall within the scope of the definition used in this research.
- **Independent assessors** provide home assessments and related advice that falls within the scope of this research. This category includes self-employed practitioners and consultants undertaking assessments using frameworks such as HomeFit, Homestar, Passive House and Healthy Homes Standards. Assessment activities may be delivered as a standalone service or alongside broader building, sustainability or home performance work.
- Citizens Advice Bureau (CAB) provides information and referral services across a range of topics, including budgeting, financial support and household costs. This includes information on managing energy bills and access to support services, subsidies and other sources of assistance.
- **Electric Communities** is a network of community groups supported by Rewiring Aotearoa. Activities are delivered primarily through local volunteers and focus on community education, information sharing and public engagement relating to household electrification and energy use. Electric Communities

Advice frameworks and advisor-led tools

- **NZGBC's HomeFit** is an assessment framework for existing homes. It can be accessed through a self-guided online assessment or through an in-home assessment undertaken by a qualified HomeFit assessor. The online platform provides information

and tools to help households assess home performance and identify opportunities for improvement, as well as links to assessors, installers and related resources. HomeFit | Introduction to HomeFit

- NZGBC Homestar is an assessment framework and rating tool for new. The current version, Homestar v5, was introduced in 2021 and rates homes on a scale from 6 to 10 stars. Ratings are determined through a combination of mandatory and discretionary points across areas including energy performance and other environmental features. The Homestar website provides information and resources for households and building professionals, including the Homestar Design Guide. Homestar Design Guide
- **Superhome Design Guide and SuperReno Guides** are online resources developed by the Superhome Movement for households undertaking new builds or renovations, and for building professionals. The guides provide information on home design, building performance and renovation approaches. Homes may also be assessed against Superhome criteria and achieve Superhome certification. Superhome Design Guide | SuperReno Guides
- **Passive House Institute New Zealand (PHINZ)** provides standards, certification pathways and information resources relating to Passive House design and retrofit projects. The PHINZ website includes information for households and building professionals, as well as directories of certified Passive House Designers, Passive House Consultants, Passive House Tradespeople and Passive House Certified buildings. PHINZ Professionals Directory
- **Healthy Homes Standards (HHS) assessors** carry out assessments, information and compliance checks related to the Healthy Homes Standards for rental properties. Practitioners identified through this research included self-employed, commercial and not-for-profit providers offering assessments and advice to landlords and tenants in relation to the five Healthy Homes Standards. Healthy Homes Standards
- **Bespoke tools** and assessment frameworks were also identified through the survey and interviews. Participants reported using a range of assessment methods, checklists, calculators and advisory tools developed in-house or adapted to meet the requirements of specific programmes, organisations or target groups. These tools are typically used alongside more widely recognised frameworks and reflect the diversity of delivery models operating across the home energy advice landscape.

Advice funding and programmes

- **Healthy Homes Initiative** refer to Case Study 4
- **Supporting Energy Education in Communities (SEEC)** is a funding programme administered by EECA to support energy education and advice services for households experiencing energy hardship. Introduced in 2020, it provides funding for community-based organisations to deliver energy-related education, advice and support.
- **Warmer Kiwi Homes (WKH)** is an EECA programme that provides grants for insulation and heating upgrades for eligible households. The programme also indirectly supports household assessments and advice activities associated with identifying, accessing and delivering eligible insulation and heating interventions.
- **Māori Home Repair Programme** is a Te Puni Kōkiri programme that provides funding to support repairs and maintenance of whānau-owned homes. The programme funds community providers to undertake home assessments, provide advice, facilitate and fund repairs, and deliver home maintenance education and workshops.
- **Pacific Healthy Homes Initiative** was a programme led by the Ministry for Pacific Peoples in partnership with Sustainability Trust and Habitat for Humanity. The initiative built on the Healthy Homes Initiative and Warmer Kiwi Homes programmes and was tailored for Pacific communities. It included home assessments, advice and support, alongside access to housing-related interventions. In August 2025, the programme was extended to June 2026.
- **Council-led programmes –** a number of councils fund advice that is in scope in their communities. These services are delivered through a variety of models, including council-employed advisors and contracted providers. Eco Design Advisors are one example of a council-led service. At the time of writing, three councils provide an Eco Design Advisor service directly, while two others contract external organisations to deliver the service for their residents. See also the sections on self-guided information and tools and Section 2.3.
- **Electricity retailers and electricity distribution businesses (EDBs)** support the delivery of personalised home energy advice through a range of funding and delivery models. Interview participants identified the electricity sector as an important source of funding for advice services, particularly those focused on households experiencing energy hardship. This support may be provided through partnerships with community organisations, specialist home energy advice providers and social service agencies, or through in-house advisory services. EnergyMate was a notable example of an electricity sector-funded programme, funded primarily by electricity retailers and lines companies and delivered through community-based financial mentoring and kaupapa Māori organisations. The programme concluded at the end of 2025. Other sector-funded advice initiatives continue to operate, including retailer and EDB partnerships with external providers. Toast Electric provides an example of a social retailer model in which personalised home energy advice forms part of the customer offering,

combining electricity retail services with in-home assessments and tailored advice for customers.

- **Community-led programmes** also play an important role in the home energy advice landscape. These programmes are delivered by a diverse range of community, iwi, hapū, Māori, Pasifika and not-for-profit organisations, often as part of broader housing, health, energy hardship or wellbeing initiatives. Many operate at a local or regional level and provide advice alongside other forms of support tailored to community needs. As part of the practitioner survey, participants were invited to indicate whether they wished to be included in a directory of home energy advice providers. A list of those who consented to be included will be provided separately.

Supporting Appendices containing the data-collection materials are available in a separate report. In particular:

Appendix 1.	Practitioner survey
Appendix 2.	Manager Survey
Appendix 3.	Semi Structured interview scripts
Appendix 4.	Participant information sheet.

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