Residential Geo-Demographic Segmentation:

2025 Update

INSIGHTS HQ

Insights prepared for
Electricity Networks Aotearoa

October 2025

Programme Review

The ENA residential segmentation was developed using actual usage data from participating EDBs.

This model has been converted to a predictive model that allows us to apply the segments to the entire NZ market.

Participating EDBs have received individual segment profile reports and ICP level segment ids so that they can align the segments to their customer base.

Insights HQ have been working with ENA since 2024 to build and update a residential segmentation for the NZ market. The solution has been developed and based around using geo-demographic (census) data and has been evolved over the last two years to the point that we now have a version of the segmentation for the entire NZ market based on the 2023 census data.

The segmentation solution uses a combination of electricity usage data (provided by EDBs) and Census data. The segmentation solution implemented for EA Networks is the standardised prediction model which has been established using the data provided by the early adopter EDBs. The model implemented is universally applied to all of the EDBs involved in this first phase of the project.

The usage data was aggregated at a customer level to a monthly and quarterly level (1 year's worth of data). Metrics were derived for average usage and variance in usage at an individual level. The usage data was then aggregated again to an SA1 level.

From Stats NZ / Census, the following variables were incorporated into the final segmentation solution:

Customer Need / Usage:

- Number of Rooms - % of homes in SA1 with 8 or more rooms
- Power Usage – Avg kWh usage over the last year

Ability to Pay:

- Deprivation Index (standardised Stats NZ metric showing relative SES of SA1)
- Personal Income (% $70k+)
- FT Employment - % of working age individuals working full time

Key Deliverables

The segmentation solution has been delivered to the participating EDBs at an ICP level allowing them to link the segments to their own customer base.

Some EDBs have already been using the segmentation solution in their own insights programmes – eg., Vector has profiled the segments using transactional data and survey results.

Going forward we can evolve this segmentation solution based on feedback from EDBs and the ENA and any new data that becomes available.

The Residential segmentation project has been going since 2024 and has produced a number of key deliverables. The project has used an ongoing approach where interim results are fed back to the ENA and presented at various workshops / FNF sessions. The feedback provided in these sessions were incorporated into the evolving work.

Since the start of the project, we have delivered:

- Version 1 Model – 2018 Census Based: 15 participating EDBs
  - Represents over 65% of the SA1s in NZ where the SA1s has more than 10 households
  - Segmentation extends to ICP level resulting in over 80% of households in scope (where the SA1 has more than 10 households)
- Version 1 Model – 2018 Census Based: National Propensity Model
  - A propensity model to estimate the power usage in the remaining SA1 areas so that the segmentation model could be applied.
  - The model was then compared against the actual results where we had the data from the EDBs - 80+% accuracy for the EDBs compared
- Version 1 Model – 2023 Census Based: National Propensity Model
  - The 2018 Census predictive model converted to the updated 2023 Census data
- ENA New Energy Concepts POC Survey: August 2025
  - IHQ/ENA worked together to develop a survey to cover NZ attitudes towards different energy saving concepts (N=1074)
  - Where data allows, survey results were linked to ENA Residential segments to allow for additional profiling of the segmentation solution

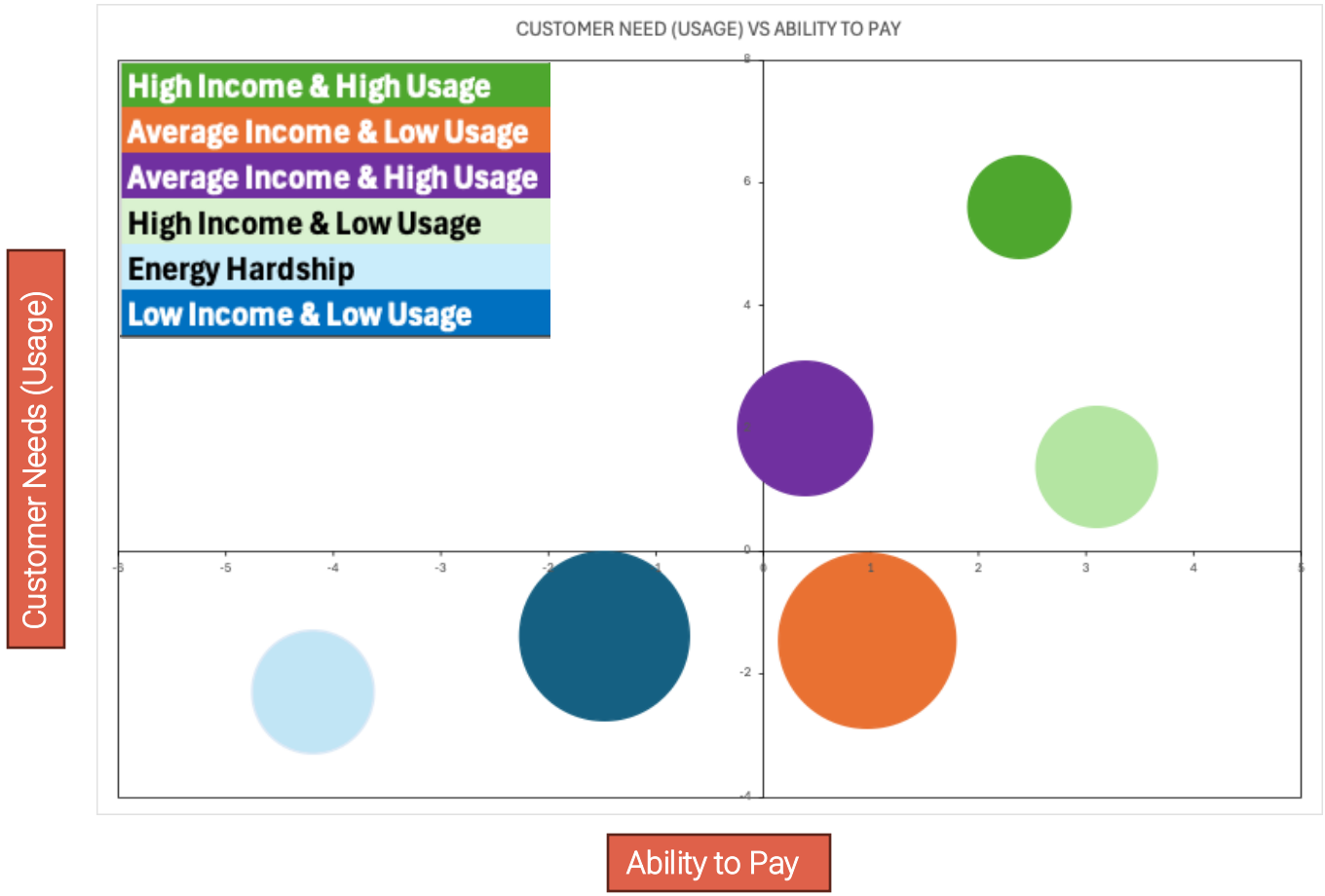
This report provides an overview of the segmentation solution using the NZ national model and a segment specific view of the ENA New Energy Concepts Survey results. The ENA has already received a separate report for the survey results so in this report we will focus on just the segment profiles.

Overall Segmentation Profile – Ability to Pay vs Customer Needs (Usage)

The graph to the right shows where the six segments sit in the 'Ability to Pay' vs 'Customer Need' spectrum. The size of the circle indicates the size of the segment (% of SA1's).

The *High Income & High Usage* and *High Income & Low Usage* segments are skewed towards having more ability to pay. The *High Income & High Usage* segment skews strongly to having more 'customer needs' (using more power, larger houses, etc).

The *Energy Hardship* and *Low Income & Low Usage* segments are clearly the customers who are going to struggle the most to pay their power bills.

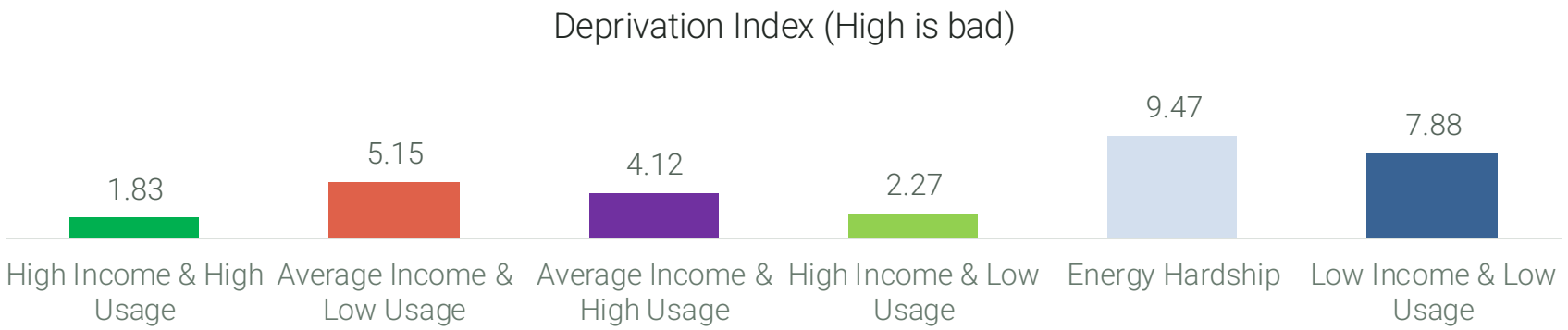


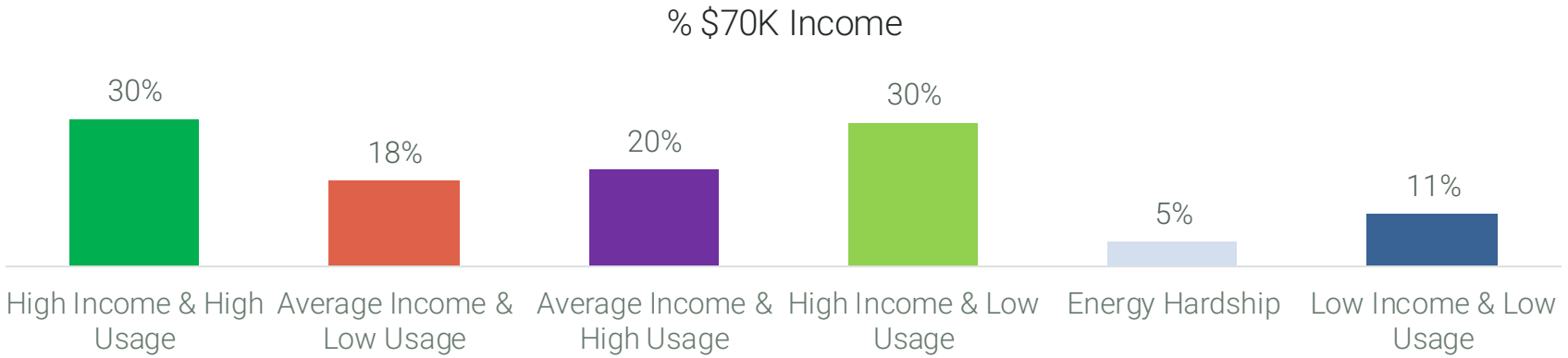
Segment Comparisons – Ability to Pay

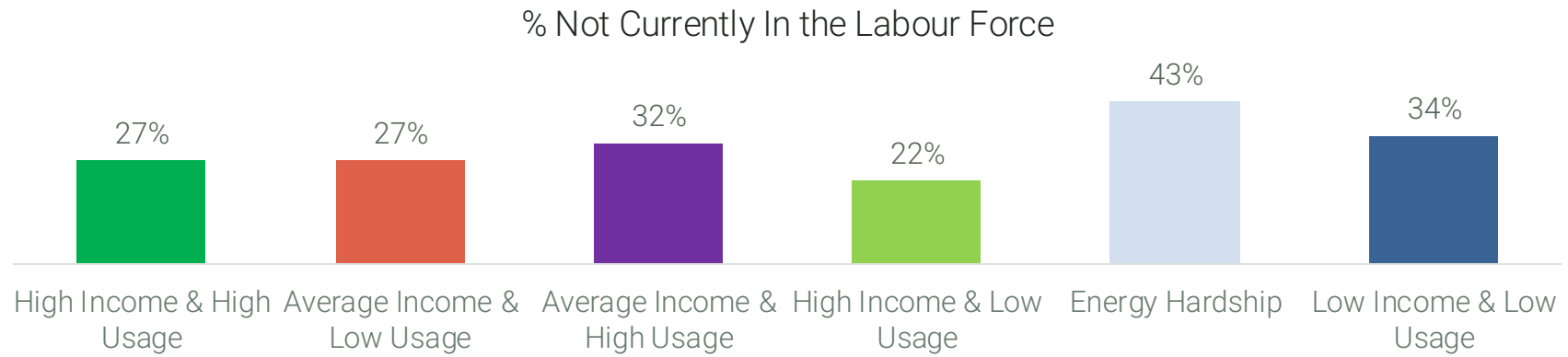
The two low-income segments (*Energy Hardship* and *Low Income & Low Usage*) consistently show lower Socio-Economic results – higher Deprivation Index scores, lower % high personal income, and higher % of people not in the workforce.

On the flip side of the coin, the two upper income segments (*High Income & High Usage* and *High Income & Low Usage*), have the lowest Deprivation Index scores, higher personal incomes, and more people in the workforce.

The other two segments fall consistently in the middle of the pack for these income related metrics.





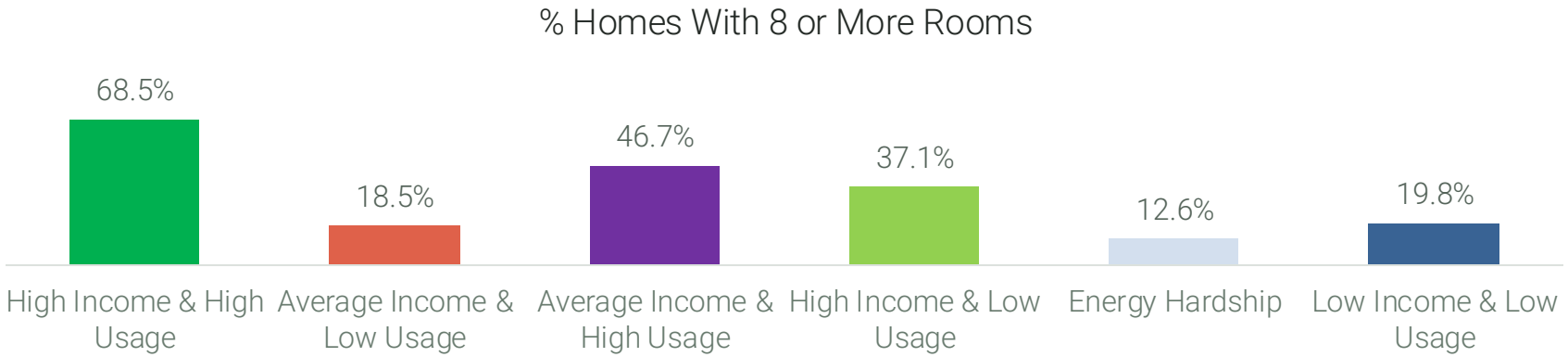


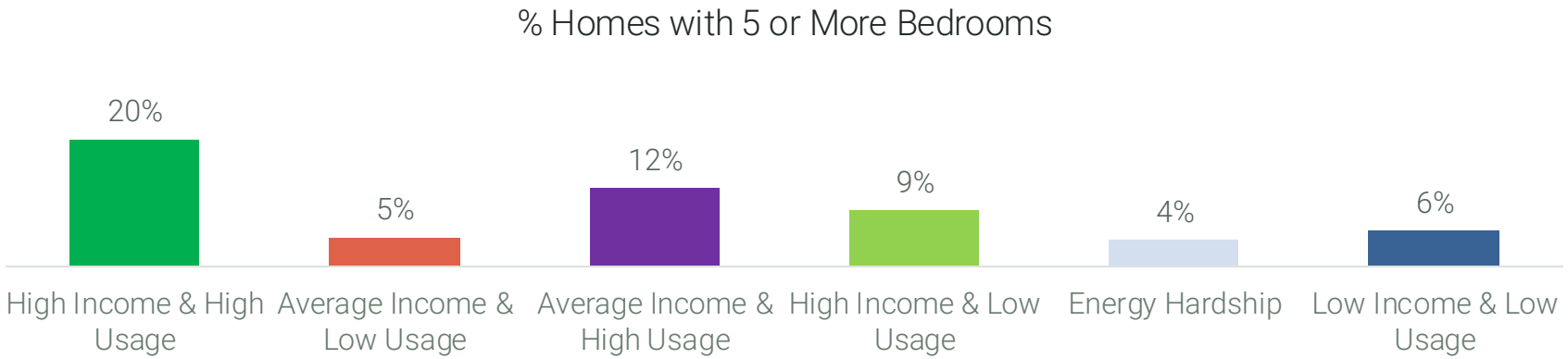
Segment Comparisons – Customer Need (Usage)

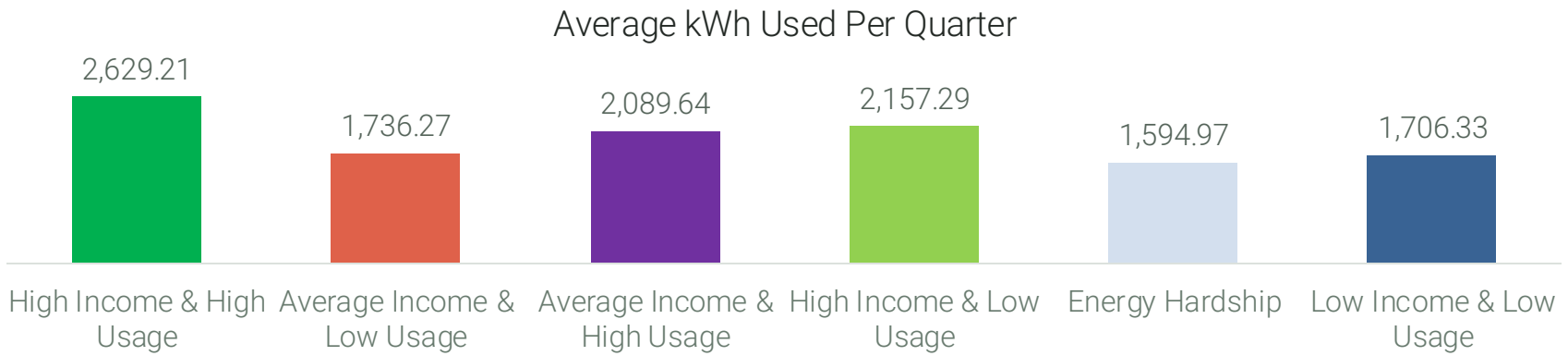
Looking at the usage profile, we can see the *High Income & High Usage* leads by a margin in terms of usage and size of home.

On the opposite side of the frame, *Average Income & Low Usage*, *Energy Hardship*, and *Low Income & Low Usage* segments have much smaller homes and generally use less power.

The *Average Income & High Usage* and *High Income & Low Usage* segments sit firmly in the middle of the pack.



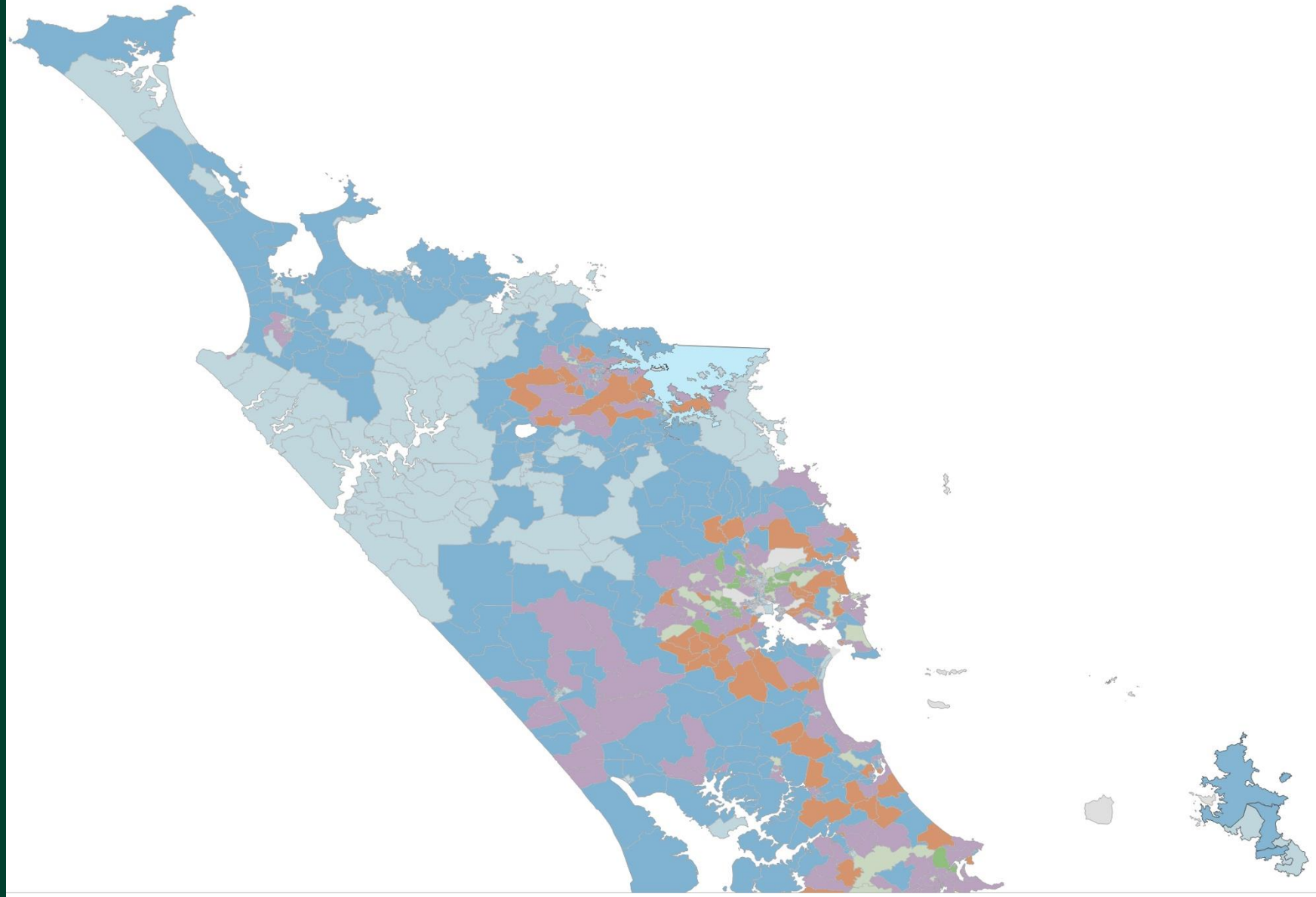




Mapping Segments

Upper North Island

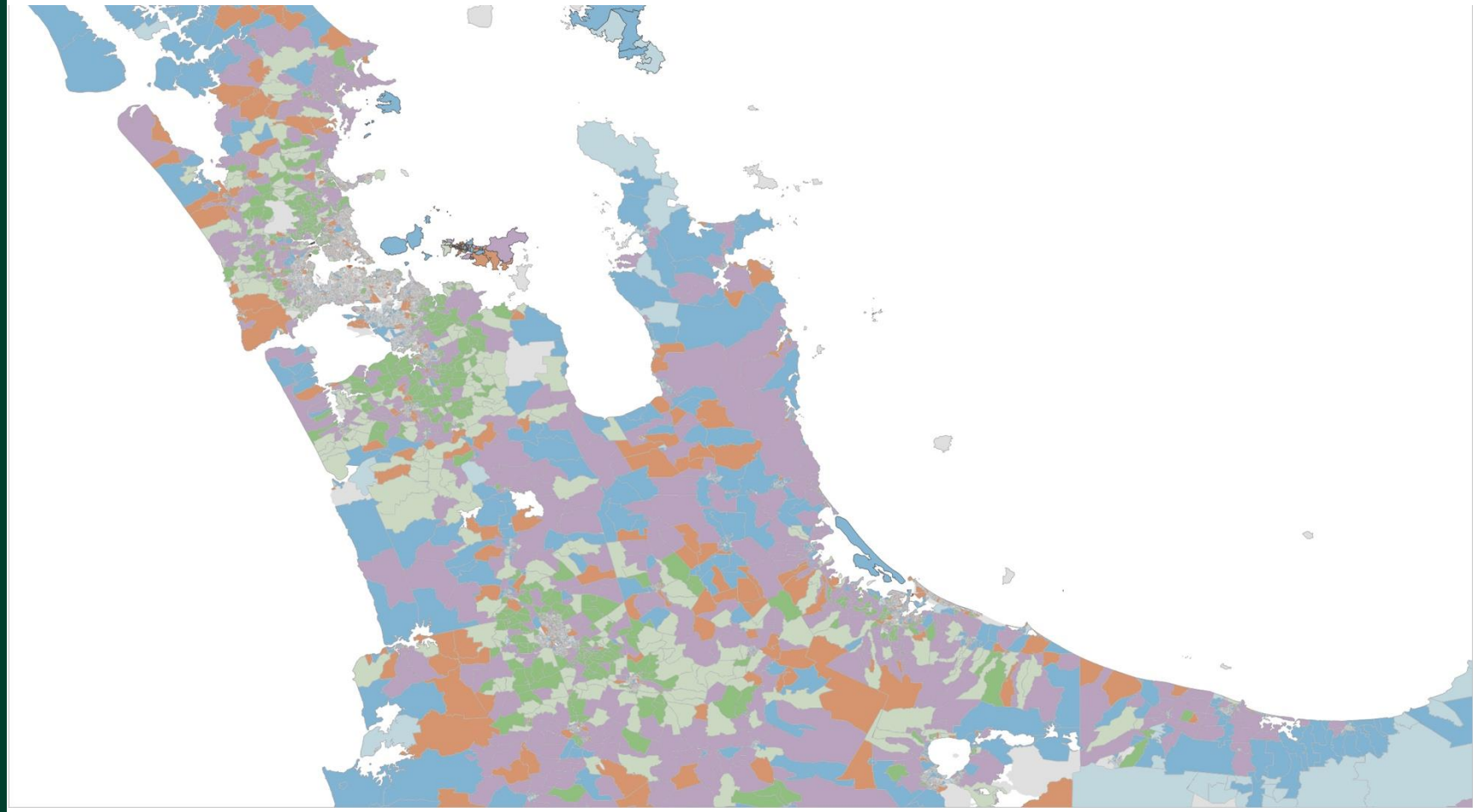
- High Income & High Usage
- Average Income & Low Usage
- Average Income & High Usage
- High Income & Low Usage
- Energy Hardship
- Low Income & Low Usage



Mapping Segments

Auckland Region

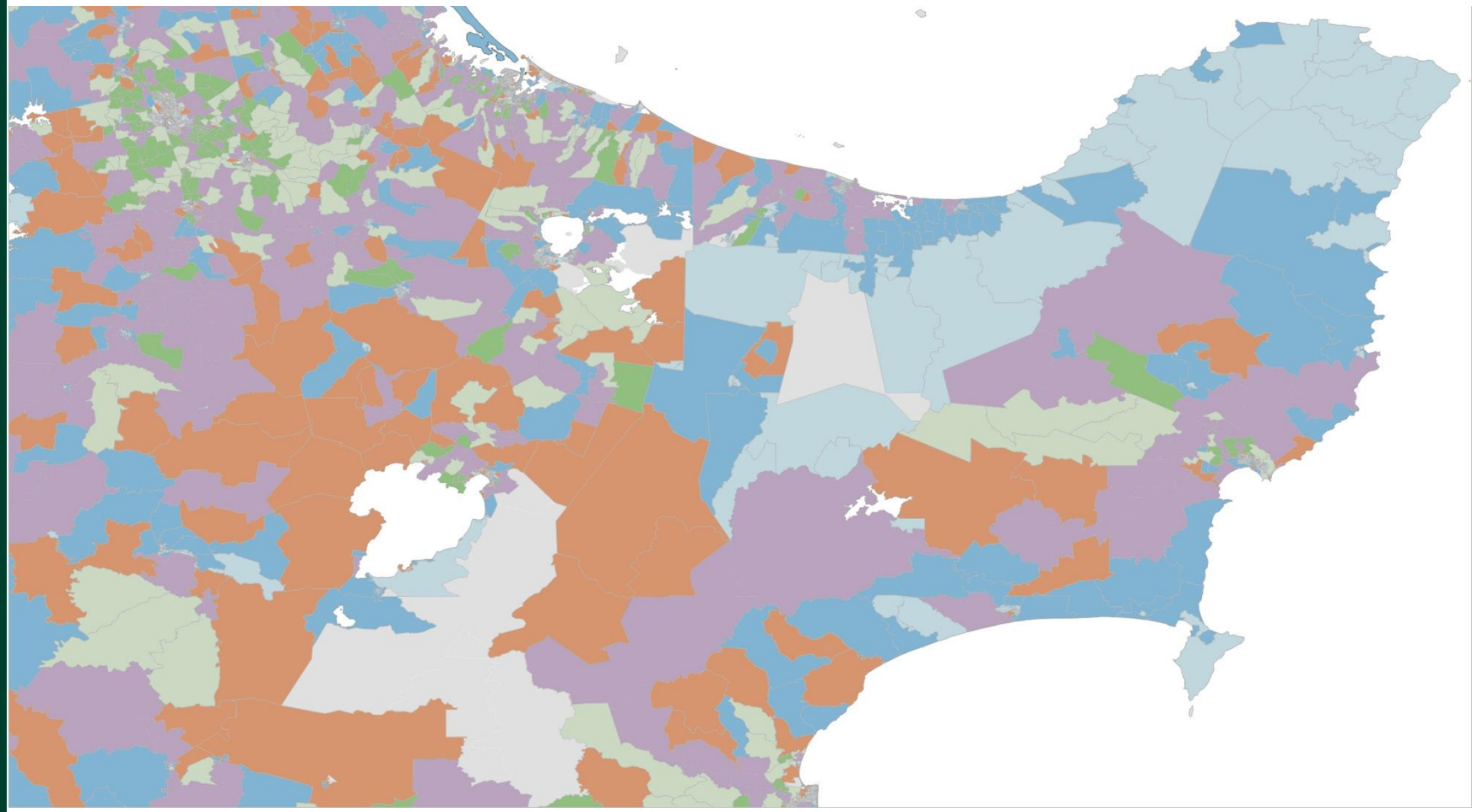
- High Income & High Usage
- Average Income & Low Usage
- Average Income & High Usage
- High Income & Low Usage
- Energy Hardship
- Low Income & Low Usage



Mapping Segments

Mid-North Island – East Coast

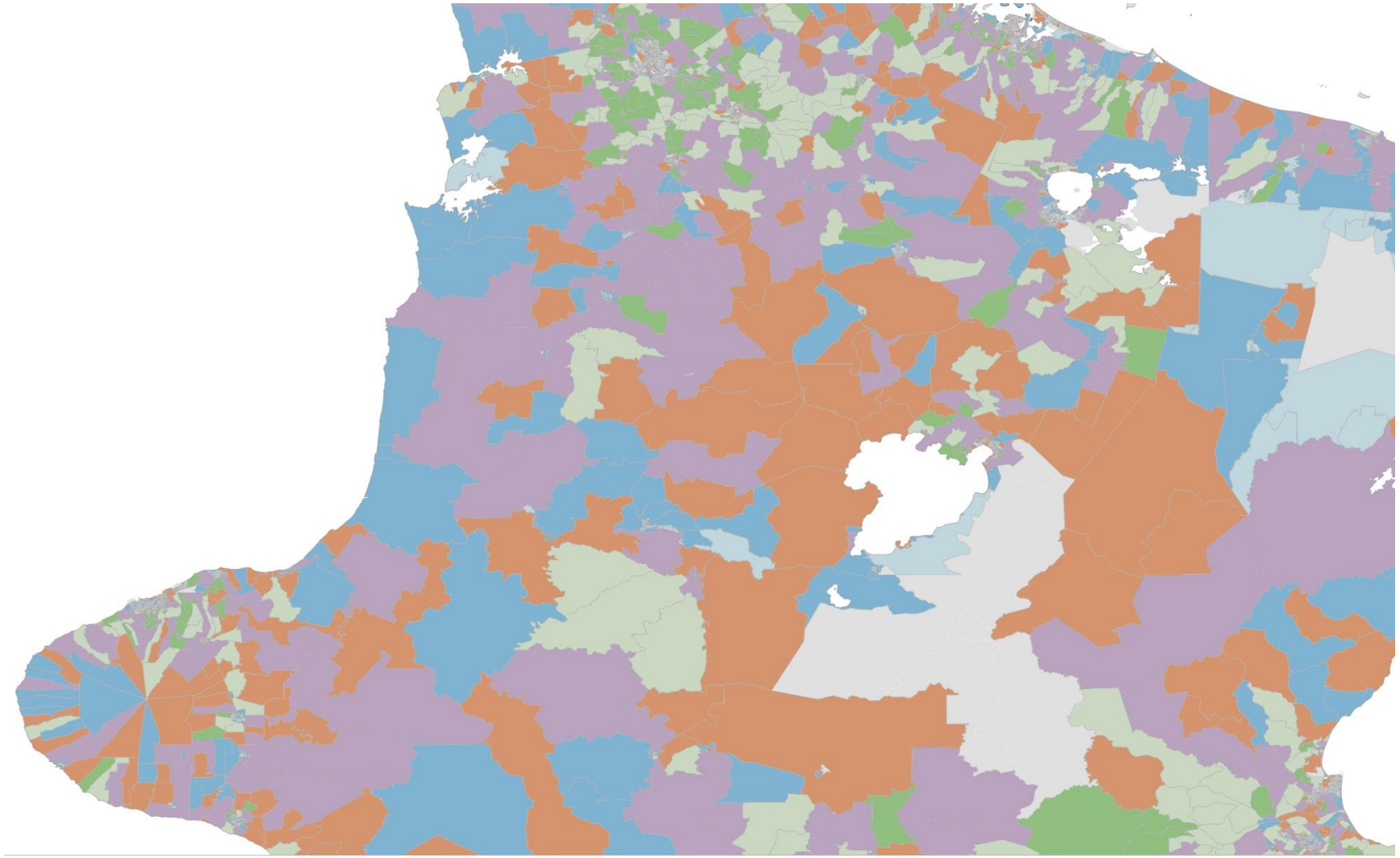
- High Income & High Usage
- Average Income & Low Usage
- Average Income & High Usage
- High Income & Low Usage
- Energy Hardship
- Low Income & Low Usage



Mapping Segments

Mid-North Island – West Coast

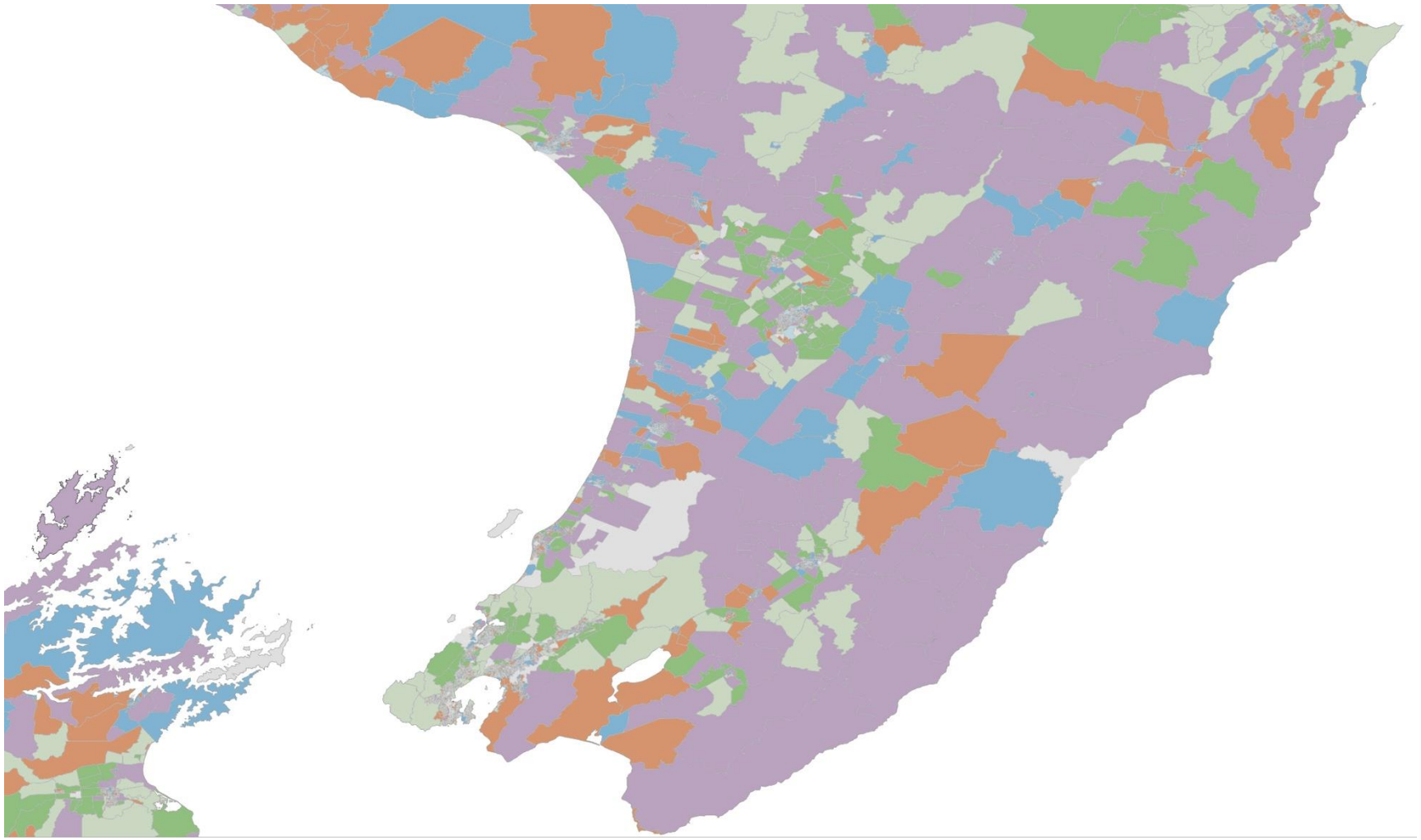
- High Income & High Usage
- Average Income & Low Usage
- Average Income & High Usage
- High Income & Low Usage
- Energy Hardship
- Low Income & Low Usage



Mapping Segments

Wellington Region

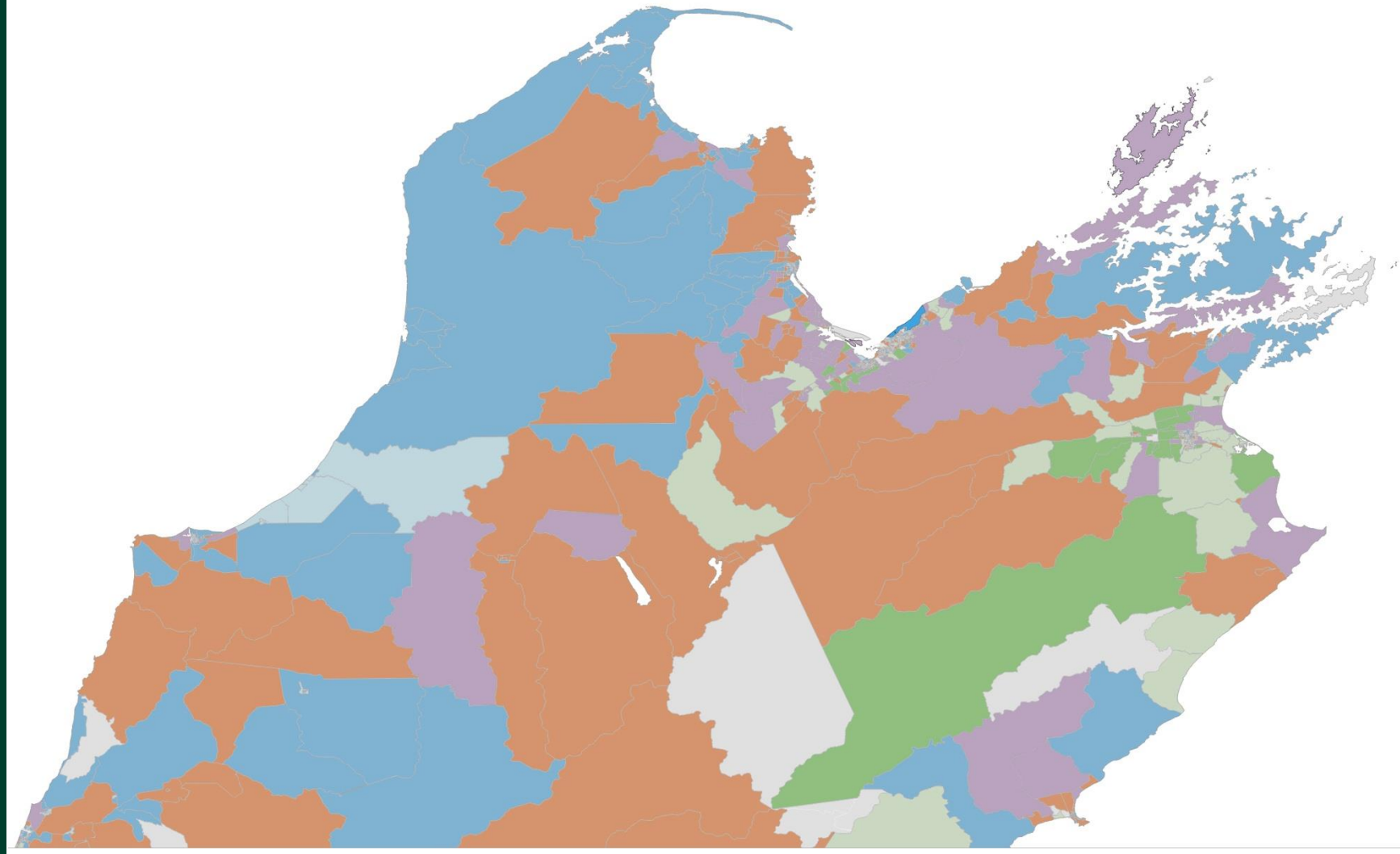
- High Income & High Usage
- Average Income & Low Usage
- Average Income & High Usage
- High Income & Low Usage
- Energy Hardship
- Low Income & Low Usage



Mapping Segments

Upper South Island

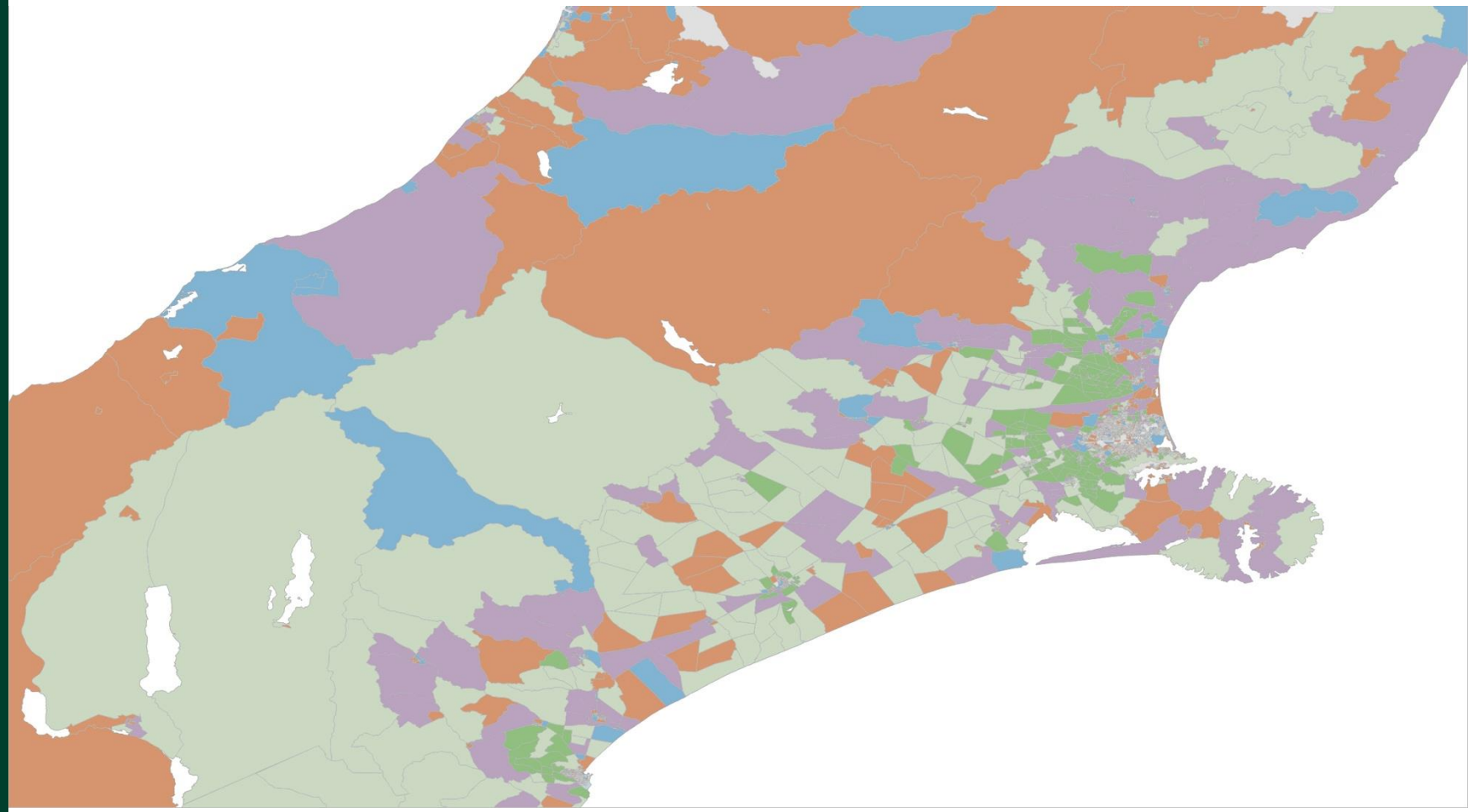
- High Income & High Usage
- Average Income & Low Usage
- Average Income & High Usage
- High Income & Low Usage
- Energy Hardship
- Low Income & Low Usage



Mapping Segments

Canterbury Region

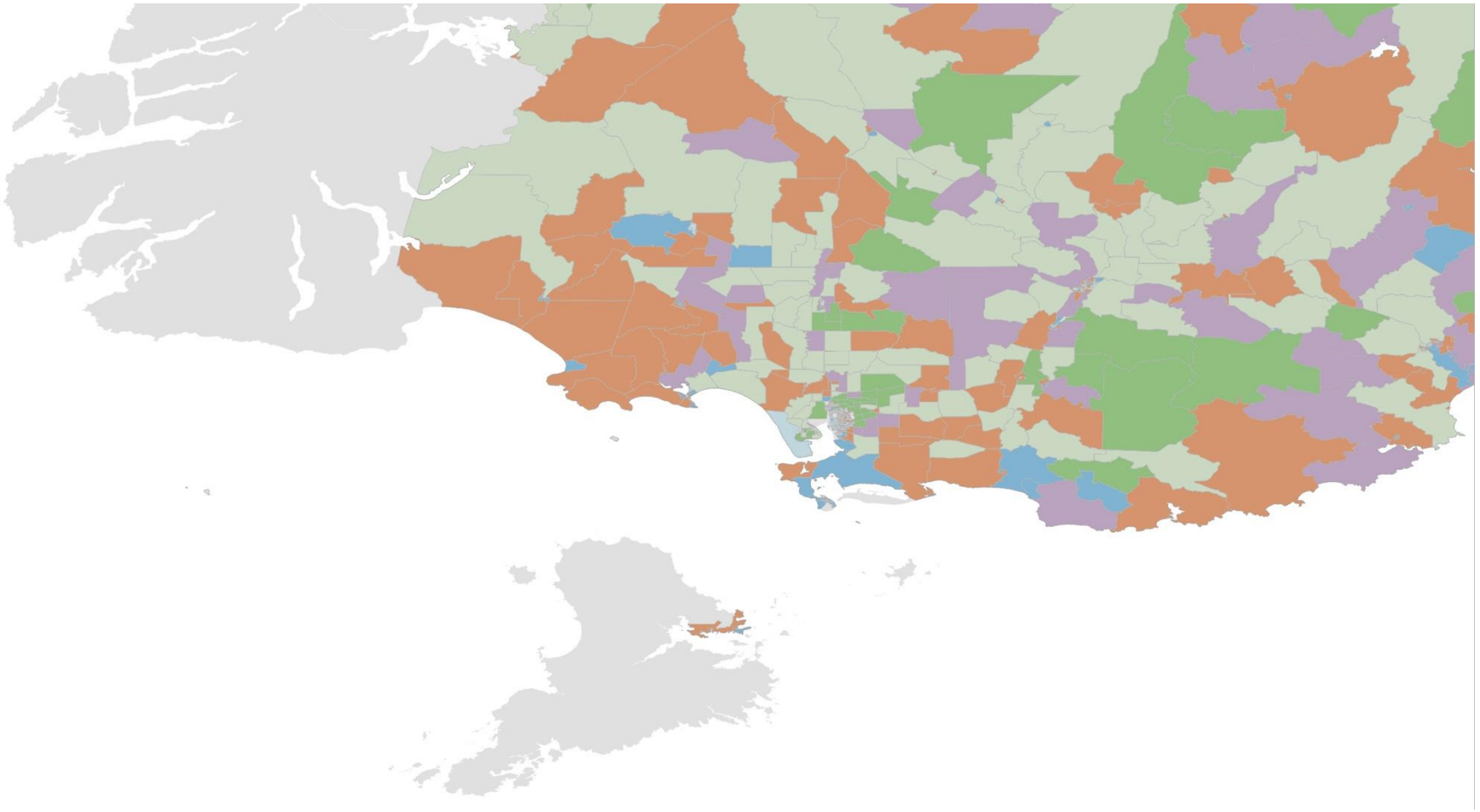
- High Income & High Usage
- Average Income & Low Usage
- Average Income & High Usage
- High Income & Low Usage
- Energy Hardship
- Low Income & Low Usage



Mapping Segments

Lower South Island

- High Income & High Usage
- Average Income & Low Usage
- Average Income & High Usage
- High Income & Low Usage
- Energy Hardship
- Low Income & Low Usage



EDB Comparisons

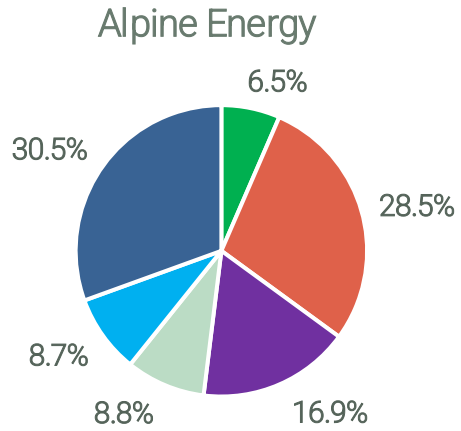
- High Income & High Usage
- Average Income & Low Usage
- Average Income & High Usage
- High Income & Low Usage
- Energy Hardship
- Low Income & Low Usage

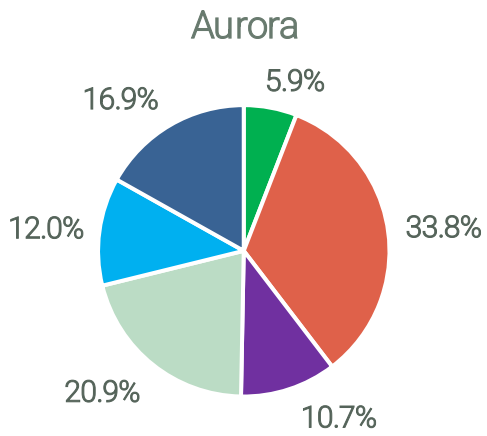
The results for the 15 different EDBs are shown in the graphs over the next two pages.

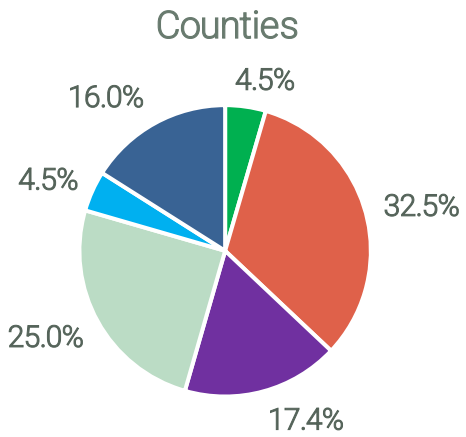
The participating EDBs demonstrate a range of results reflective of the NZ population.

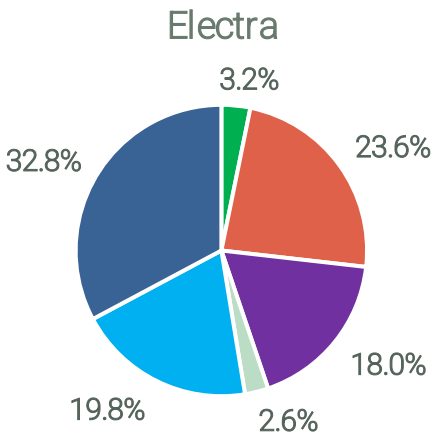
For example, the *High Income & High Usage* segment ranges from a high point of 18% of Main Power's base to a low of 0% for Top Energy.

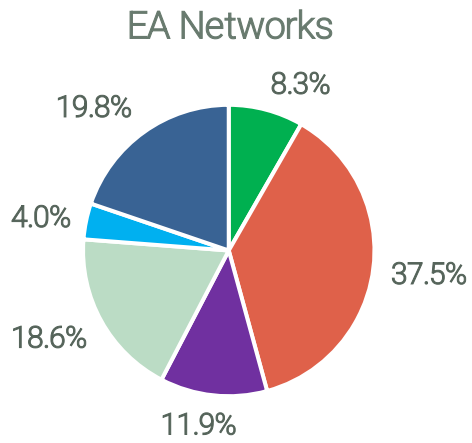
Similarly, the *High Income & Low Usage* segment varies from a high point of 25% for Counties vs 1-2% for Top Energy and The Lines.

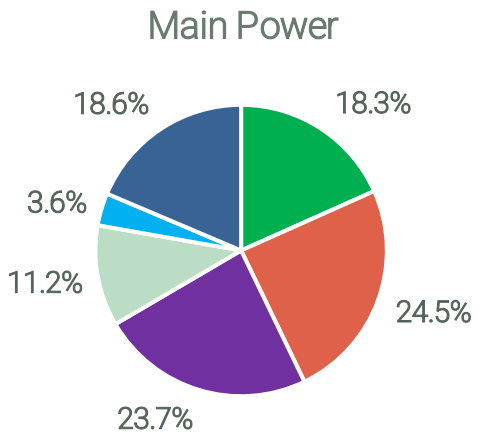


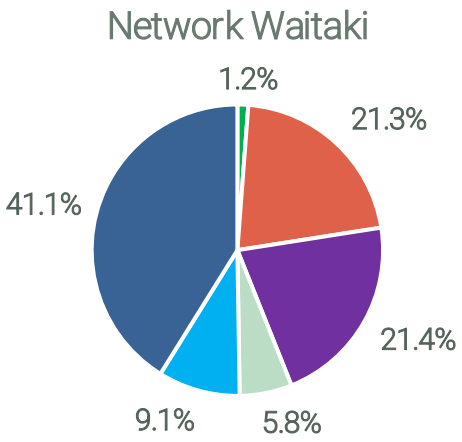


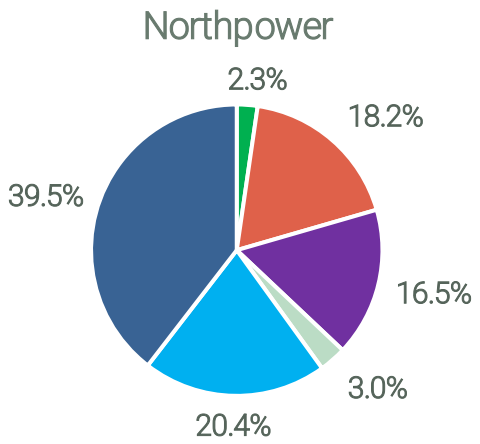


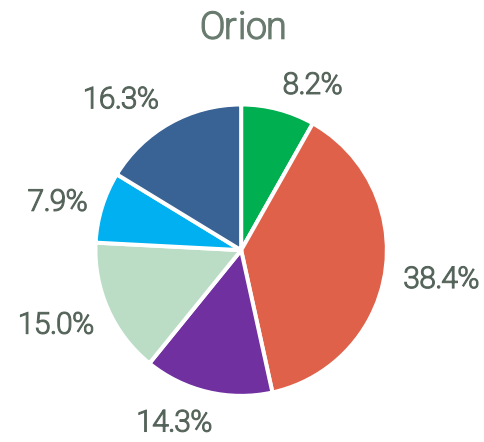












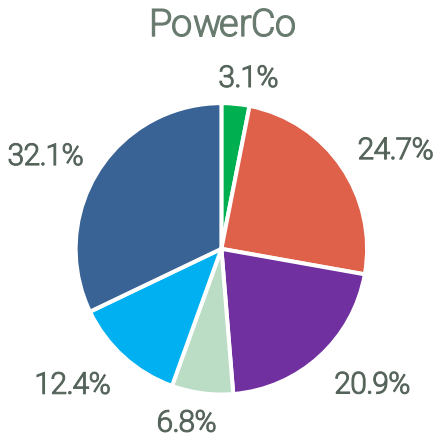
EDB Comparisons

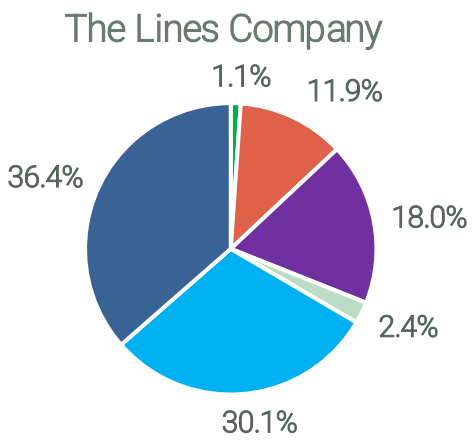
- High Income & High Usage
- Average Income & Low Usage
- Average Income & High Usage
- High Income & Low Usage
- Energy Hardship
- Low Income & Low Usage

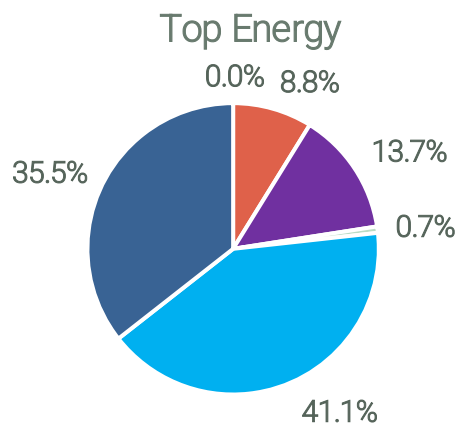
Similarly, the segmentation does an effective job of identifying EDBs with bigger "Power Poverty" customer bases.

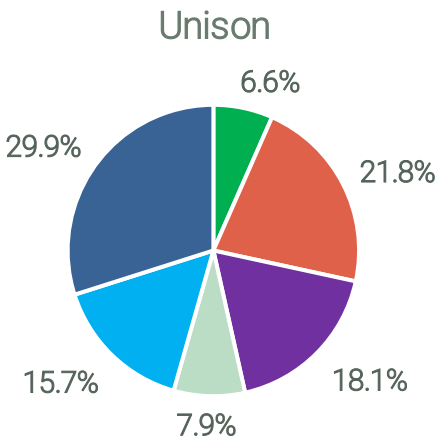
In particular, we can see the results for Top Energy and The Lines Company point to challenges for those regions of the country and those EDBs.

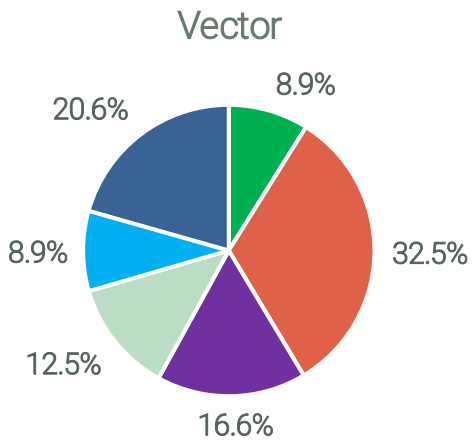
For Top Energy, 41% of their base fall into the *Energy Hardship* segment. For The Lines Company, that segment represents over 30% of the base. Both companies have over 35% of their base fall ingo the *Low Income & Low Usage* segment.

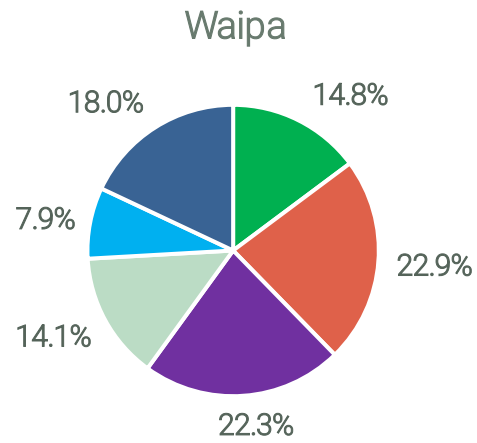












EDB Comparisons: Segment Distributions – %'s

SA1 Level

Segments	Alpine Energy	Aurora	Counties	Electra	EA Networks	Main Power	Network Waitaki	Northpower	Orion	PowerCo	The Lines Company	TOP Energy	Unison	Vector	Waipa
High Income & High Usage	7.2%	7.0%	18.5%	4.1%	8.0%	20.6%	1.5%	2.3%	8.3%	4.5%	1.4%	0.0%	6.5%	9.7%	14.6%
Average Income & Low Usage	27.6%	32.7%	16.6%	22.1%	36.4%	21.6%	17.6%	18.9%	38.1%	21.1%	11.2%	7.7%	21.7%	30.1%	27.2%
Average Income & High Usage	18.8%	11.4%	18.9%	19.8%	12.4%	27.4%	23.5%	15.6%	14.2%	23.3%	21.0%	13.0%	17.4%	16.8%	21.3%
High Income & Low Usage	9.0%	19.8%	20.7%	3.2%	20.0%	10.2%	7.4%	3.4%	13.5%	7.1%	3.7%	0.8%	7.5%	12.5%	13.2%
Energy Hardship	8.2%	12.6%	6.9%	18.7%	3.1%	3.3%	8.1%	22.0%	8.2%	12.7%	27.1%	45.6%	15.7%	9.3%	5.9%
Low Income & Low Usage	29.2%	16.4%	18.5%	32.0%	20.0%	16.8%	41.9%	37.8%	17.7%	31.2%	35.5%	32.9%	31.3%	21.5%	17.9%

ICP Level

Segments	Alpine Energy	Aurora	Counties	Electra	EA Networks	Main Power	Network Waitaki	Northpower	Orion	PowerCo	The Lines Company	TOP Energy	Unison	Vector	Waipa
High Income & High Usage	6.5%	5.9%	16.8%	3.2%	8.3%	18.3%	1.2%	2.3%	8.2%	3.1%	1.1%	0.0%	6.6%	8.9%	14.8%
Average Income & Low Usage	28.5%	33.8%	16.1%	23.6%	37.5%	24.5%	21.3%	18.2%	38.4%	24.7%	11.9%	8.8%	21.8%	32.5%	22.9%
Average Income & High Usage	16.9%	10.7%	19.2%	18.0%	11.9%	23.7%	21.4%	16.5%	14.3%	20.9%	18.0%	13.7%	18.1%	16.6%	22.3%
High Income & Low Usage	8.8%	20.9%	21.4%	2.6%	18.6%	11.2%	5.8%	3.0%	15.0%	6.8%	2.4%	0.7%	7.9%	12.5%	14.1%
Energy Hardship	8.7%	12.0%	5.6%	19.8%	4.0%	3.6%	9.1%	20.4%	7.9%	12.4%	30.1%	41.1%	15.7%	8.9%	7.9%
Low Income & Low Usage	30.5%	16.9%	20.7%	32.8%	19.8%	18.6%	41.1%	39.5%	16.3%	32.1%	36.4%	35.5%	29.9%	20.6%	18.0%

EDB Comparisons: Segment Distributions – Counts

SA1 Level - Counts

Segments	Alpine Energy	Aurora	Counties	Electra	EA Networks	Main Power	Network Waitaki	Northpower	Orion	PowerCo	The Lines Company	TOP Energy	Unison	Vector	Waipa	Totals
High Income & High Usage	27	80	113	24	18	99	2	16	225	72	3	0	98	852	52	1,681
Average Income & Low Usage	104	372	101	130	82	104	24	133	1,027	334	24	29	327	2,638	97	5,526
Average Income & High Usage	71	130	115	116	28	132	32	110	384	369	45	49	262	1,473	76	3,392
High Income & Low Usage	34	225	126	19	45	49	10	24	364	113	8	3	114	1,097	47	2,278
Energy Hardship	31	143	42	110	7	16	11	155	221	201	58	172	237	816	21	2,241
Low Income & Low Usage	110	186	113	188	45	81	57	266	478	494	76	124	472	1,881	64	4,635
Total	377	1,136	610	587	225	481	136	704	2,699	1,583	214	377	1,510	8,757	357	19,753

ICP Level - Counts

Segments	Alpine Energy	Aurora	Counties	Electra	EA Networks	Main Power	Network Waitaki	Northpower	Orion	PowerCo	The Lines Company	TOP Energy	Unison	Vector	Waipa	Totals
High Income & High Usage	1,751	4,763	7,059	1,365	1,272	6,818	128	1,217	16,558	4,484	133	0	6,471	49,532	3,497	105,048
Average Income & Low Usage	7,670	27,480	6,766	9,965	5,776	9,149	2,263	9,574	77,684	35,308	1,421	2,522	21,327	180,784	5,413	403,102
Average Income & High Usage	4,548	8,671	8,056	7,613	1,826	8,849	2,267	8,658	29,021	29,882	2,148	3,913	17,734	92,213	5,258	230,657
High Income & Low Usage	2,371	16,979	8,946	1,098	2,864	4,186	617	1,595	30,375	9,728	284	207	7,755	69,342	3,322	159,669
Energy Hardship	2,343	9,756	2,330	8,357	612	1,334	968	10,709	15,967	17,751	3,587	11,725	16,313	49,270	1,869	152,891
Low Income & Low Usage	8,218	13,767	8,688	13,888	3,058	6,934	4,361	20,746	32,932	45,967	4,331	10,131	29,200	114,592	4,238	321,051
Total	26,901	81,416	41,845	42,286	15,408	37,270	10,604	52,499	202,537	143,120	11,904	28,498	98,800	555,733	23,597	1,372,418

ENA Power Concepts Study

Segment Summary

Overall Summary of ENA Energy Concepts Survey

Affordability is paramount

Cost pressures dominate consumer sentiment, especially among renters and lower-income. Fixed charges and seasonal bill spikes are key pain points.

Consumers are engaged but constrained

Most people actively manage energy use through behavioural changes and appliance upgrades. However, adoption of smart technologies like HEMS remains low due to cost, complexity, and lack of awareness.

Solar and EV interest is strong but uneven

Solar ownership sits at 10%, with high satisfaction and reported savings. Yet barriers such as upfront cost, housing type, and uncertainty about ROI limit broader uptake.

EV ownership is growing, with 86% of users charging at home.

Demographics shape adoption of new technologies

Younger, higher-income, and mortgage-holders are more open to new technologies. Older and retired individuals are less likely to adopt due to perceived complexity and limited benefit.

Information access shapes decisions

Consumers rely heavily on digital sources and peer networks for energy-related decisions. This underscores the importance of clear, accessible, and trusted information to support informed choices.

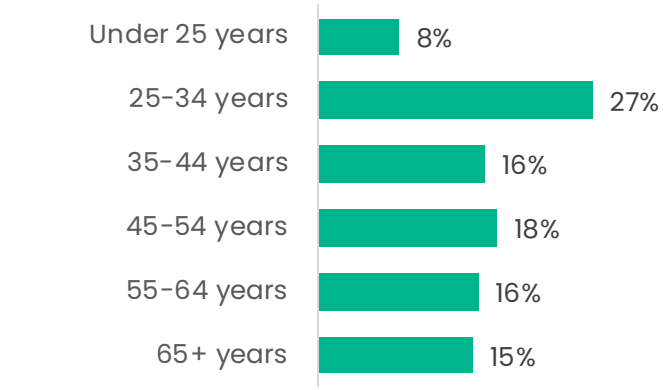
ena electricity networks aotearoa

Nationally representative sample

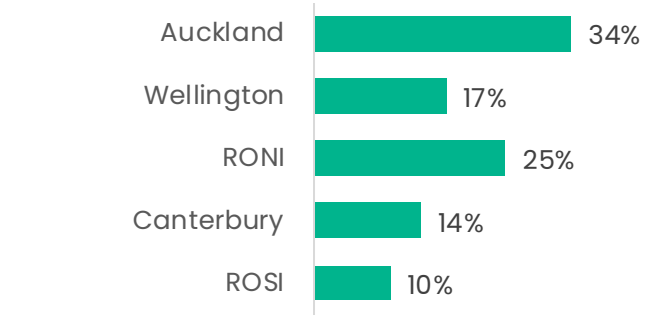
In August 2025, we surveyed **N=1051** people, representative of New Zealanders based on age, gender and region.

On a sample size of 1051 the margin of error is +/- 3%.

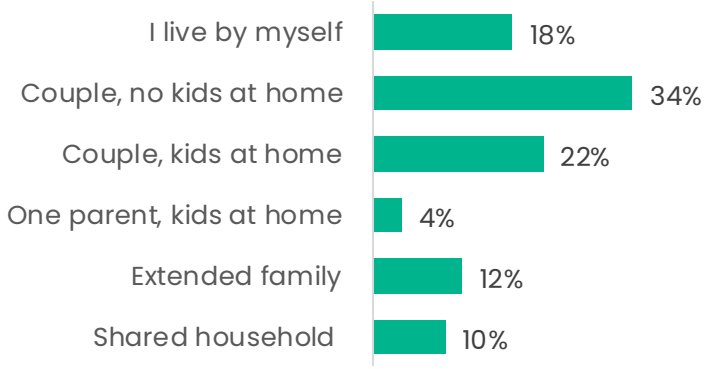
AGE



REGION

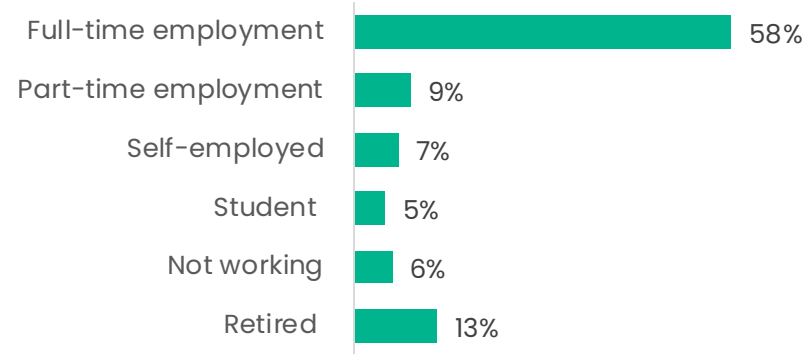


HOUSEHOLD SITUATION

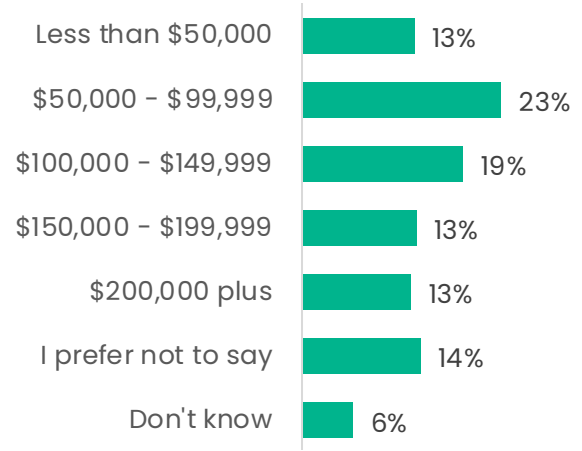


GENDER

EMPLOYMENT STATUS



HOUSEHOLD INCOME

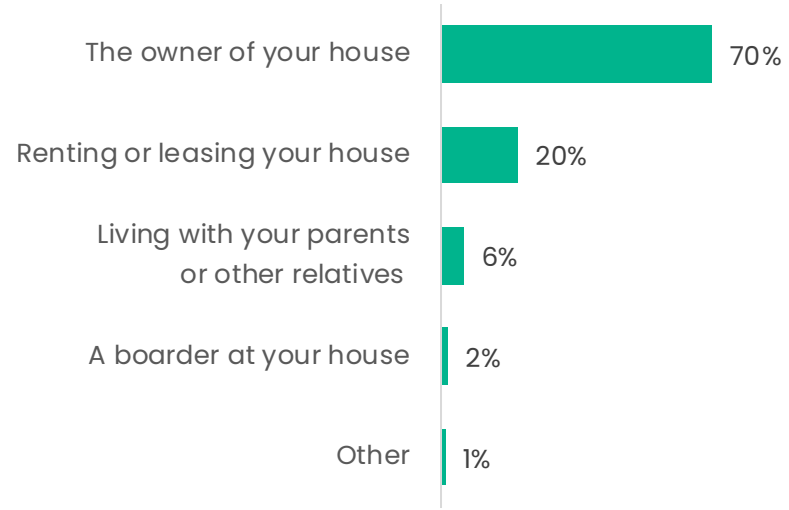


Good representation of electricity providers

70% owned their own homes (61% with a mortgage).

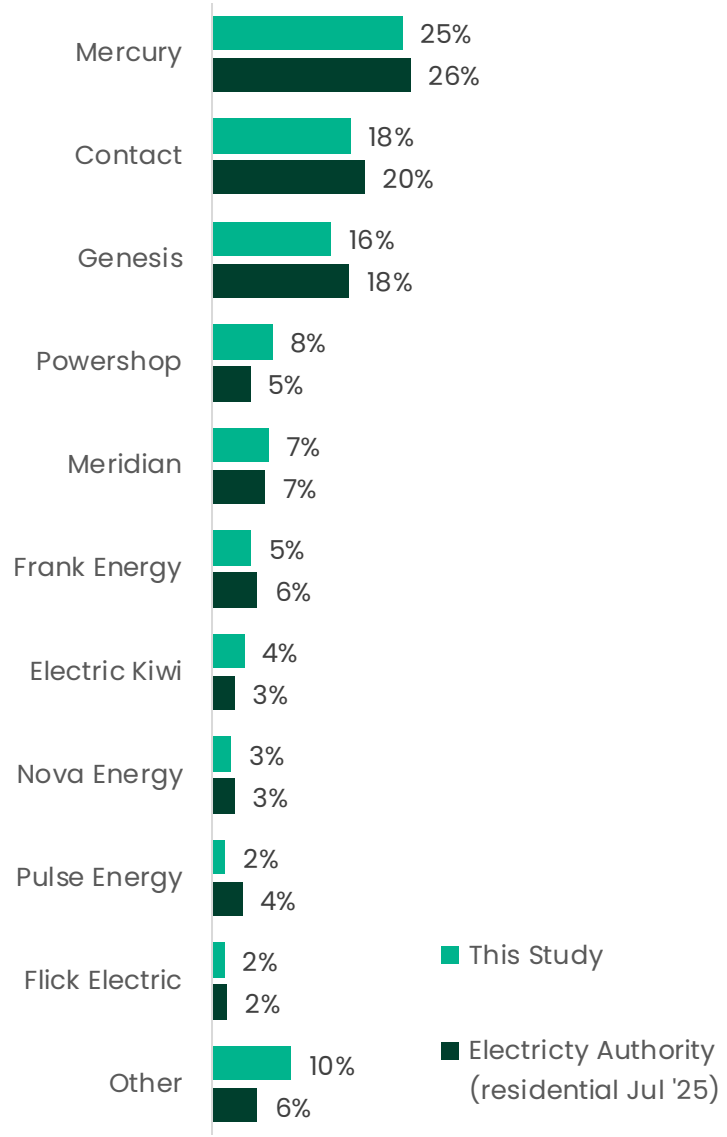
Electricity providers used align to Electricity Authority data.

HOME OWNERSHIP



MORTGAGE

ENERGY PROVIDER



Q. Are you...[home ownership]. Base total n=1051
Q. Do you have a mortgage on your home. Base homeowners n=837
Q. When it comes to who provides electricity to the home you live in the most, which of the following companies do you use for your power? Base total n=1051

Cost is the key power concern

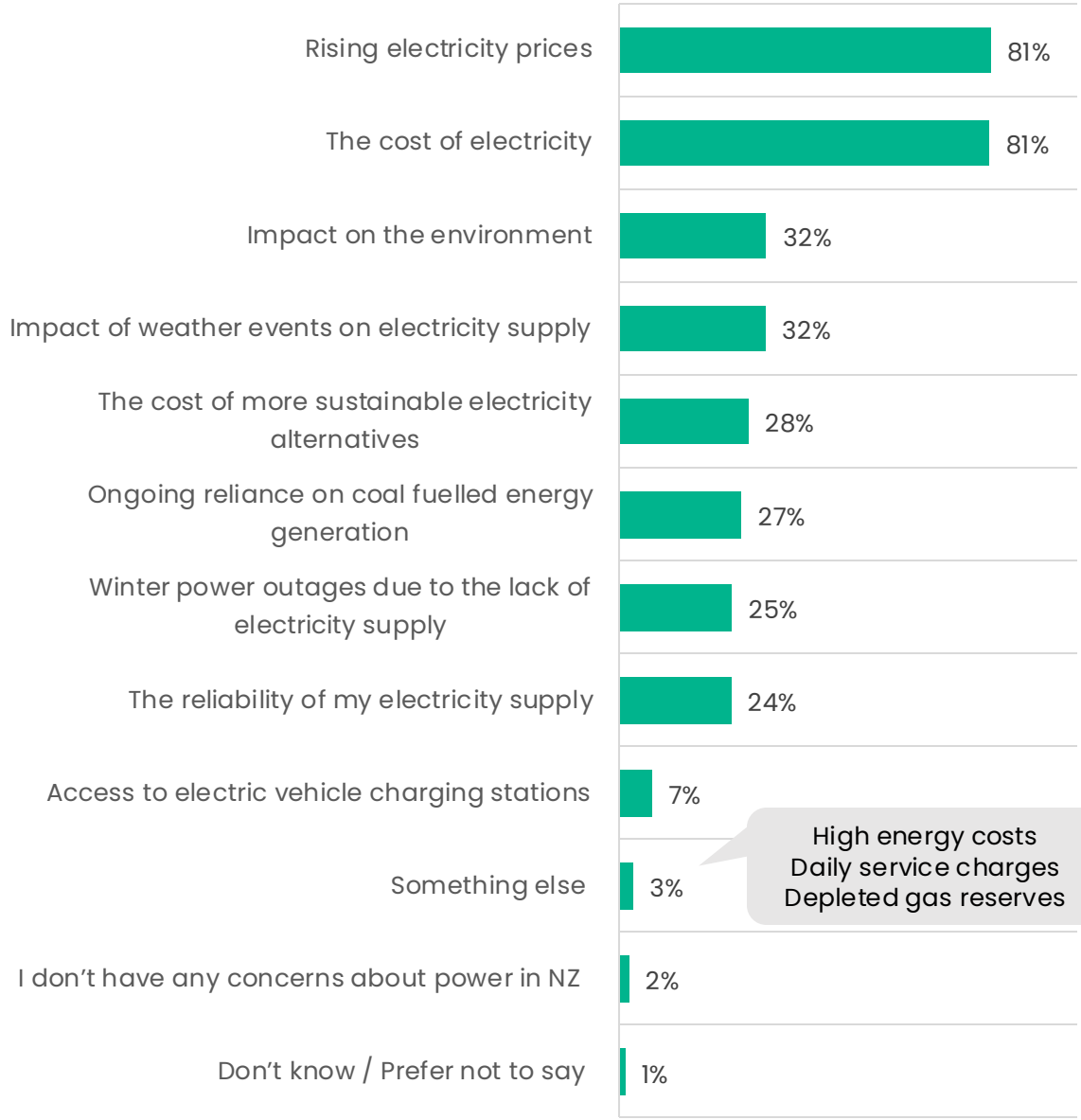
Cost is the dominant concern for New Zealanders when it comes to energy. This underscores the importance of affordability in energy-related decision-making and policy.

Cost is of more concern among low income and renters.

Under 35 YO's were more concerned with sustainability, coal use and environment.

High income individuals were more likely to mention environment and EV charging stations.

ENERGY CONCERNS



Q. Thinking about power in New Zealand, which, if any, of the following are you concerned about? Base total n=1051

Energy Concern

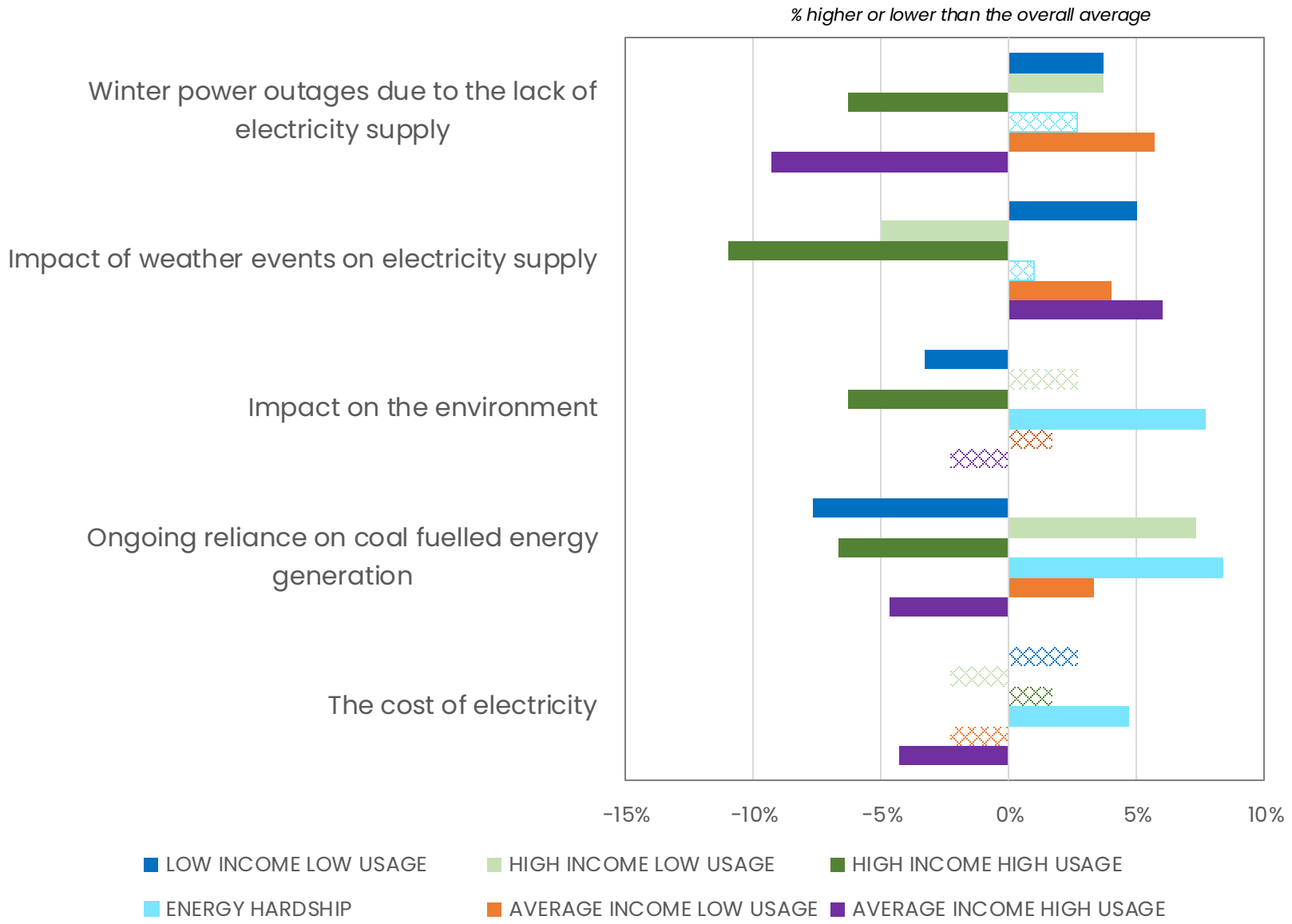
Segment Differences

The respondents who are in the *High Income & High Usage* segment are less concerned across the board with the exception for 'the cost of electricity'.

The respondents from the low usage segments are more likely to be over-represented for all of the energy concerns EXCEPT for the 'the cost of electricity'.

The *Energy Hardship* respondents much more concerned across the board with the *Low Income & Low Usage* respondents being more concerned than average except for reliance on coal and the impact on the environment.

ENERGY CONCERNS



Q. Thinking about power in New Zealand, which, if any, of the following are you concerned about?

Actions to reduce cost have the highest agreement

Most people express concern about energy costs and show a strong desire to control their energy use. There is also openness to adopting smart technologies to manage consumption.

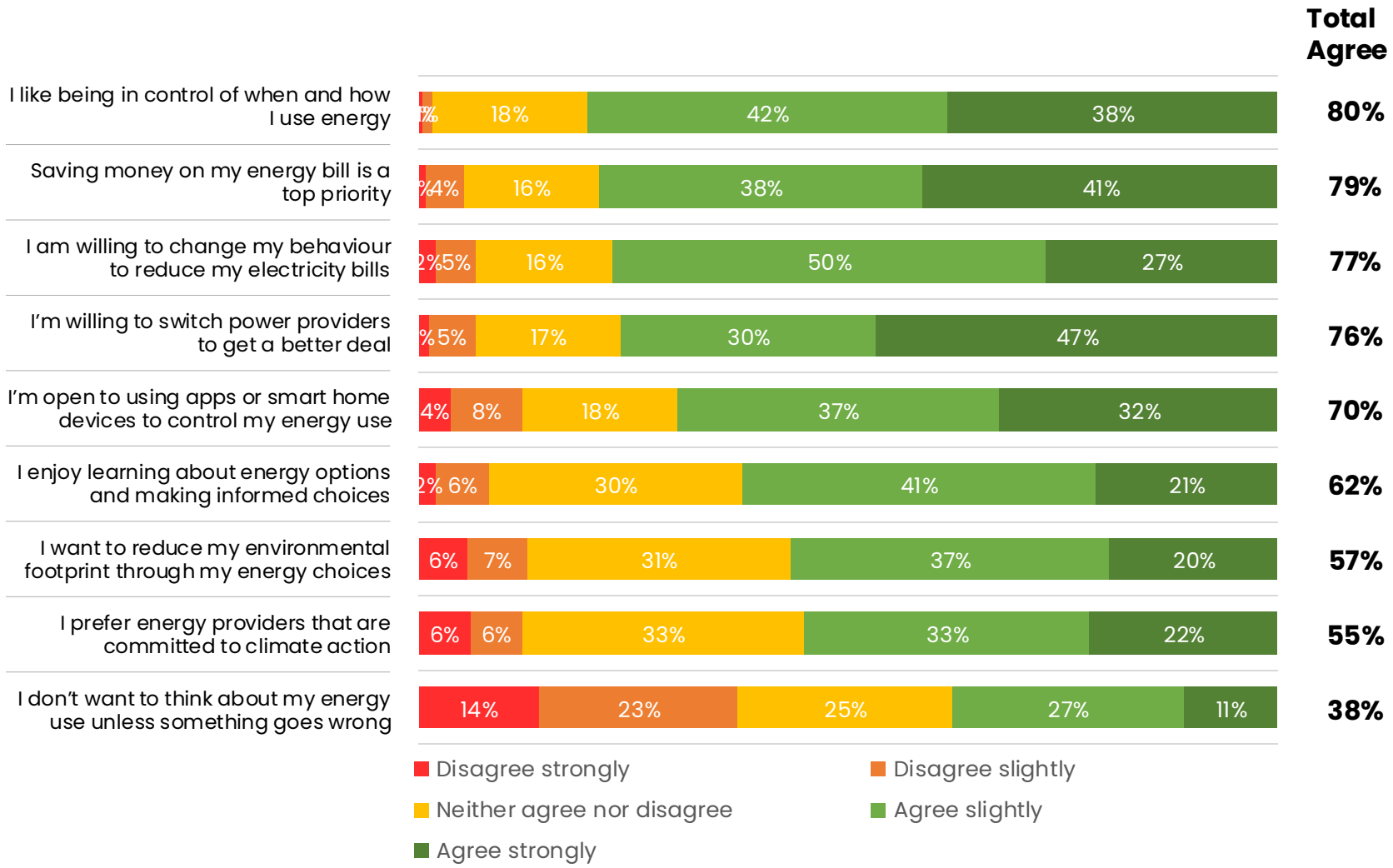
Cost-conscious behaviours (e.g. switching providers, changing usage habits) are more common among younger, higher-income, and mortgage-holders.

Smart technology adoption is favoured by under-35s and high-income earners; less so by older people.

Environmental values are more prominent among women and those in shared households.

Only thinking about energy when issues arise is more common among under 35s and Aucklanders.

ENERGY ATTITUDES



Q. How strongly do you agree or disagree with the following... Base total n=1051

Energy Attitudes

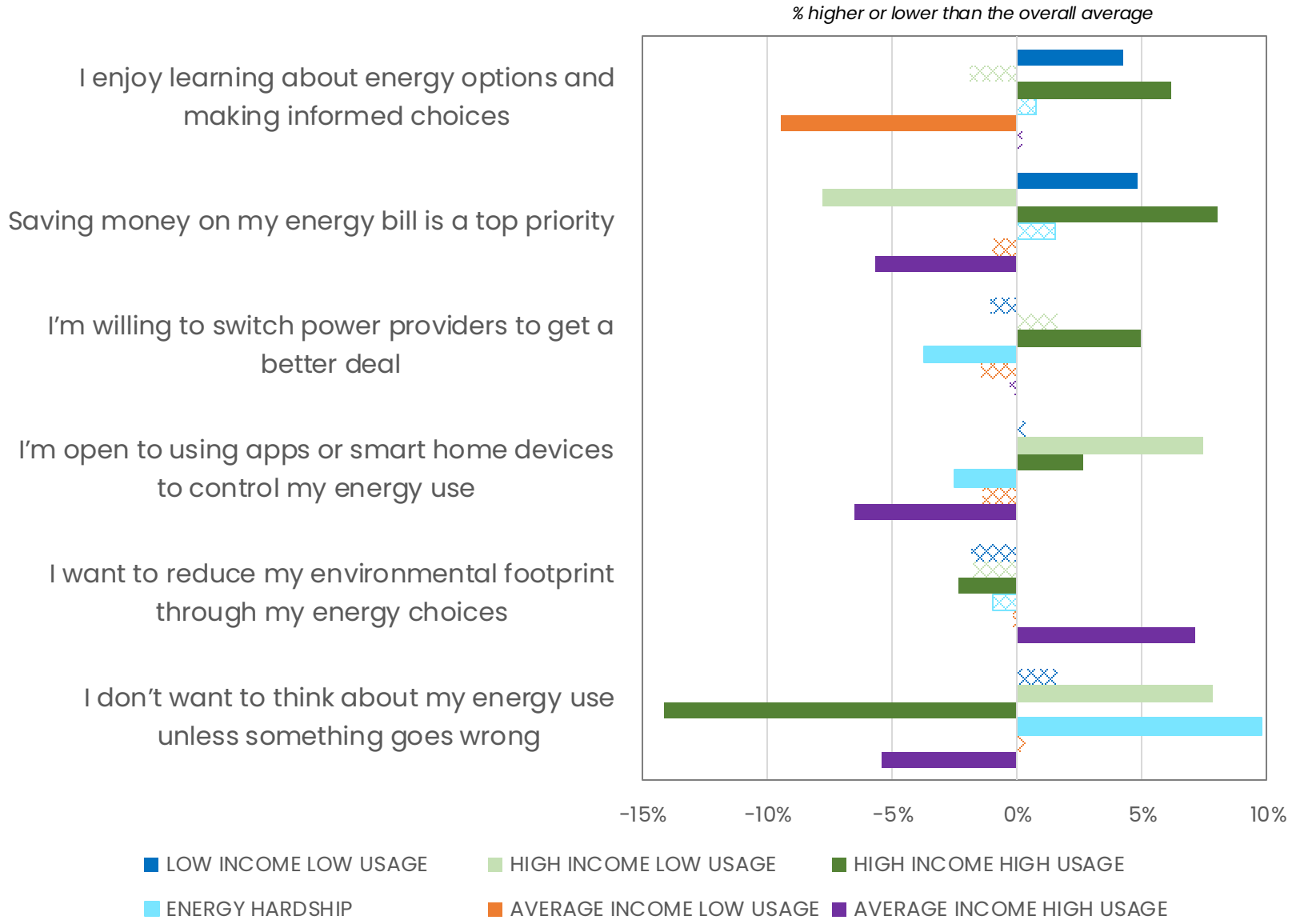
Segment Differences

The respondents from the *High Income & High Usage* segment are much more engaged across the board – much less likely to say they 'don't want to think about their energy unless something goes wrong'.

Interestingly, the respondents from the *High Income & Low Usage* segment are not particularly focused on saving money or even thinking about their energy use.

Respondents from the *Energy Hardship* segment are slightly more likely to want to save money but do not appear to be that engaged in proactively managing their energy use.

ENERGY ATTITUDES



Q. How strongly do you agree or disagree with the following...

Home renovations or appliance upgrades

Many people have taken steps to reduce energy usage through renovations or appliance upgrades. These actions reflect a proactive approach to energy efficiency.

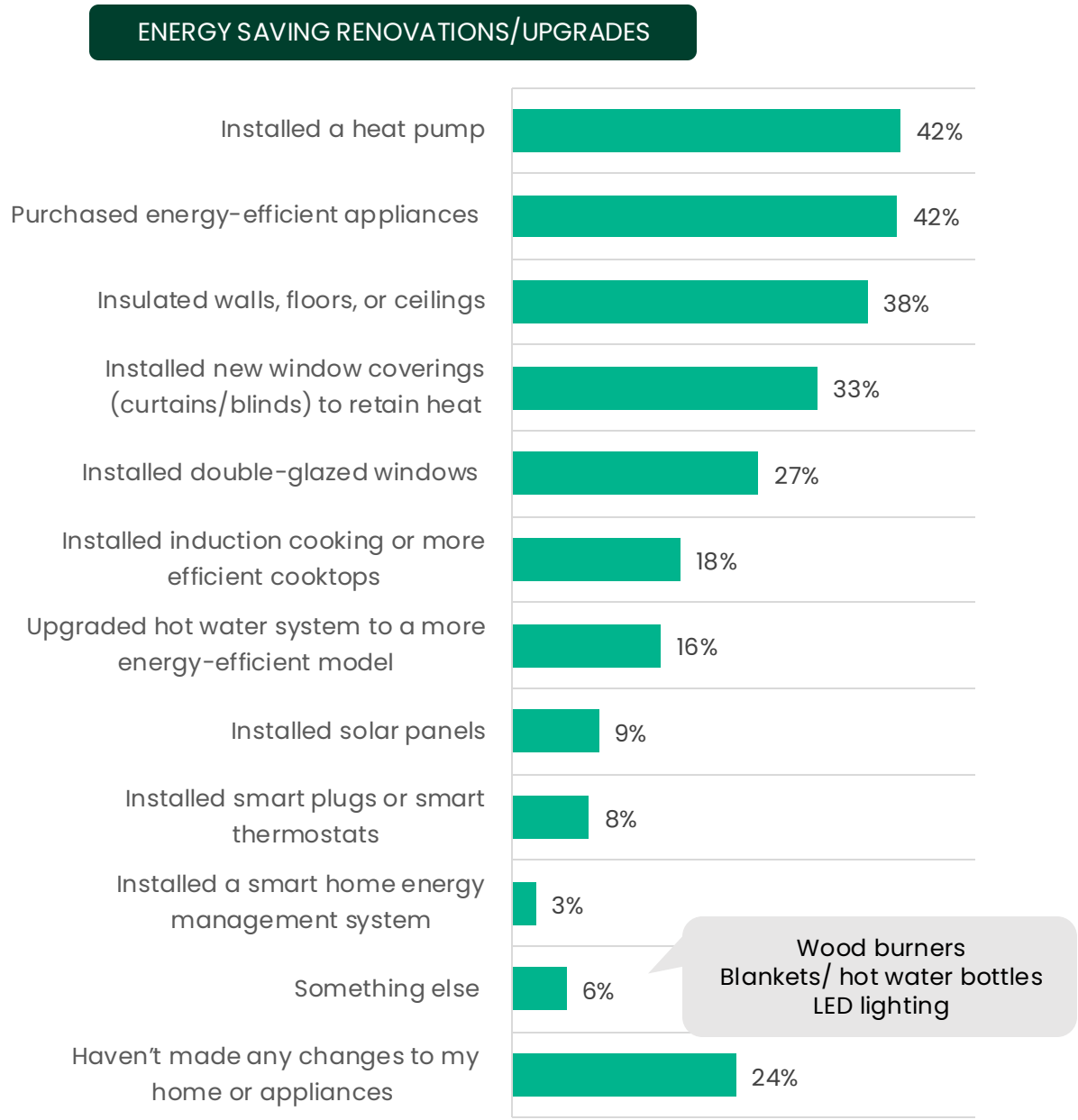
Renovations and upgrades were more common among over 65 year olds. i.e. homeowners… but also those with higher bills.

45-64 YO's were more likely to have bought new appliances, smart plugs, insulated, and double glazed.

Double glazing was more common in the South Island.

Meridian customers were more likely to have actioned many of these things.

Low income and renters were less likely to have done any of these.



Q. Have you done any of the following home renovations or appliance upgrades to reduce energy usage in your home?
Base total n=1051

Renovations / Upgrades

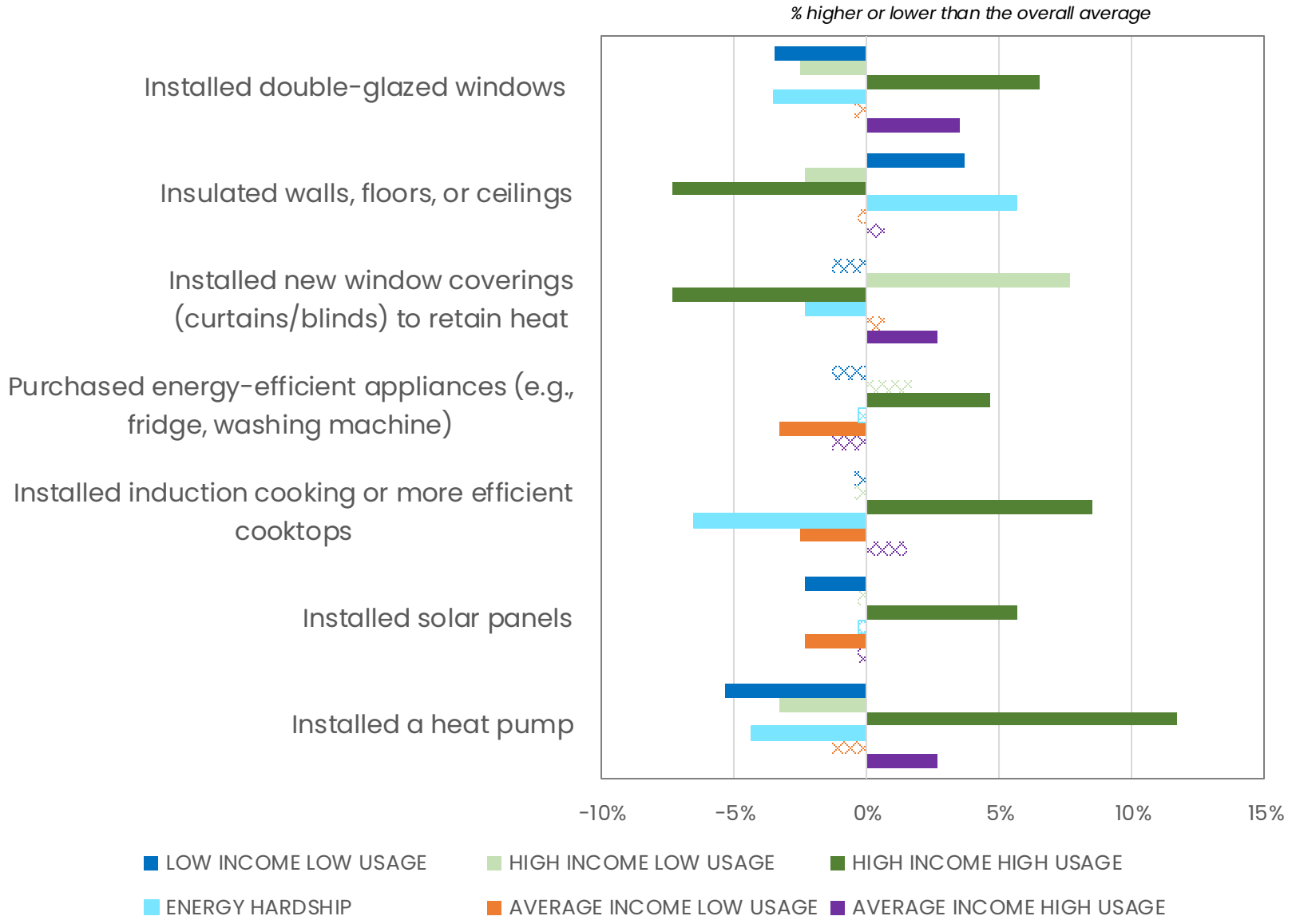
Segment Differences

The respondents from the *High Income & High Usage* segment are much more likely to have invested money into more advanced energy saving renovations / upgrades.

Average Income & High Usage respondents are also more likely to be investing in renovations / upgrades to reduce their energy costs.

Respondents from the two lower income segments are much more likely to have added insulation to the walls, floors or ceilings.

ENERGY SAVING RENOVATIONS/UPGRADES



Q. Have you done any of the following home renovations or appliance upgrades to reduce energy usage in your home?

Energy reducing actions

Common energy-saving behaviors include turning off lights, air-drying clothes, unplugging devices and using energy efficient lights. These everyday actions demonstrate widespread engagement with energy conservation (and cost saving).

Turning off lights is more common among women, South Islanders, and solo parents.

Air drying clothes is more likely among 55+, South islanders, and solo parents.

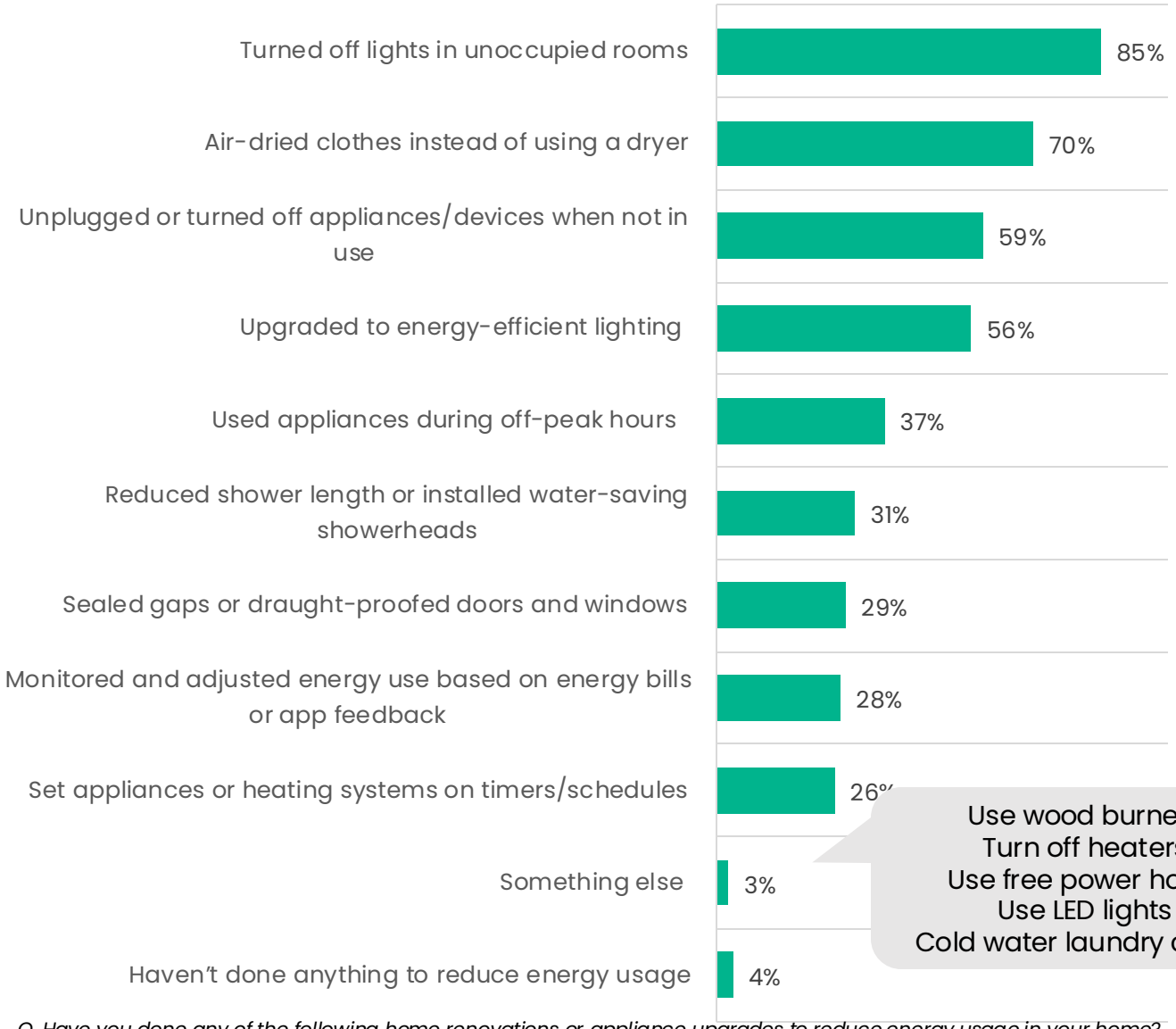
Upgrading lights is more common among over 45s, and home owners.

Using appliances in off peak is more prevalent among South Islanders, Contact, Electric Kiwi and Powershop customers.

Reducing shower length is favoured by over 65s, lower income (<$99k) and solo parents.

Adjusting use based on bills or apps is more common among under 35s.

ENERGY REDUCING ACTIONS



Q. Have you done any of the following home renovations or appliance upgrades to reduce energy usage in your home?
Base total n=1051

Energy Reducing Actions

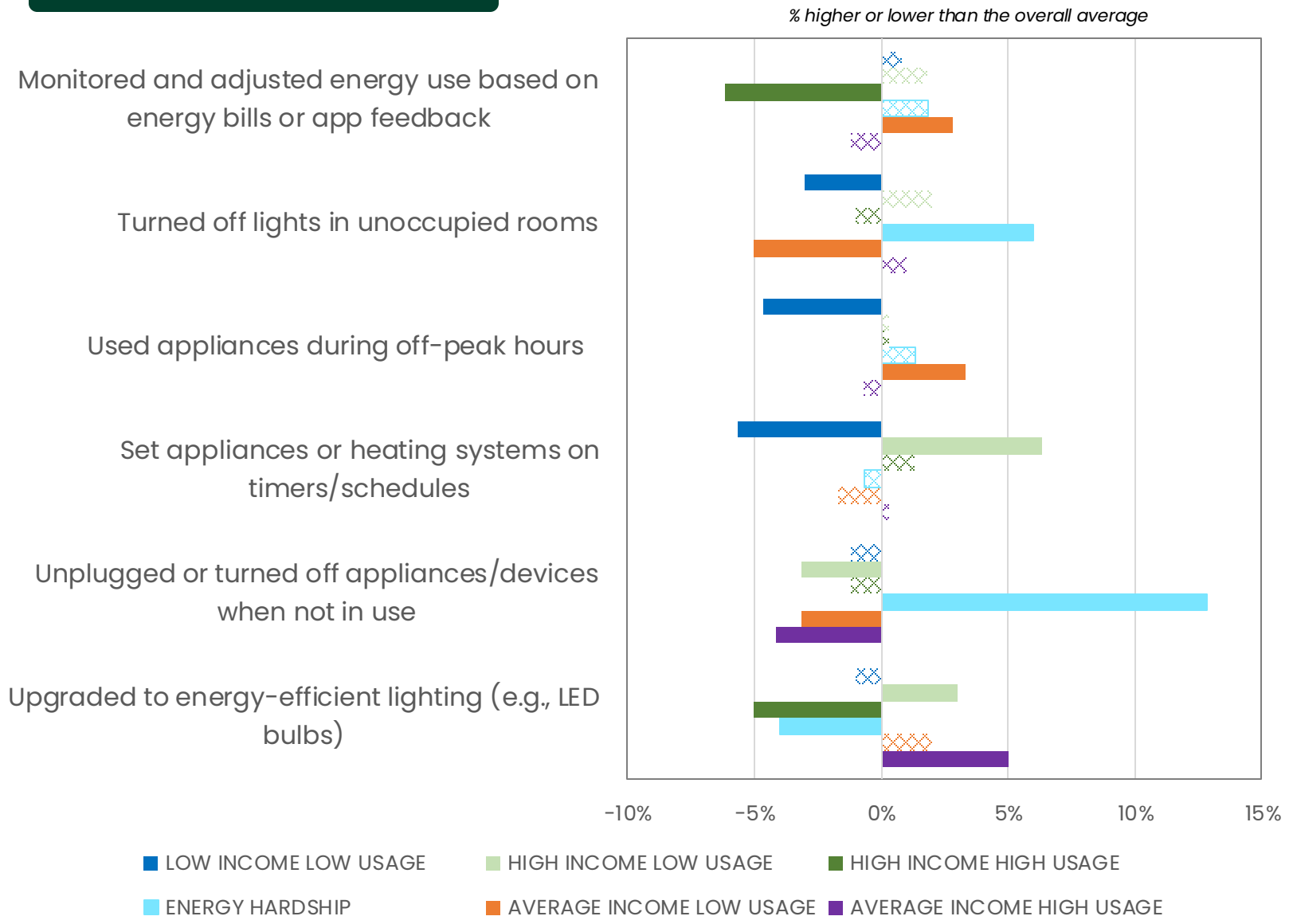
Segment Differences

While the respondents from the *High Income & High Usage* segment were much more likely to be willing to spend money to save money on power costs, they are much less likely to make basic chances to their behaviour.

The *High Income & Low Usage* segment respondents on the other hand are much more likely to be changing their behaviour to reduce their power usage.

The *Energy Hardship* respondents were much more likely to be turning off appliances when not in use, turning off lights, etc.

ENERGY REDUCING ACTIONS



Q. Have you done any of the following home renovations or appliance upgrades to reduce energy usage in your home?

7-10% EV penetration with high at home charging

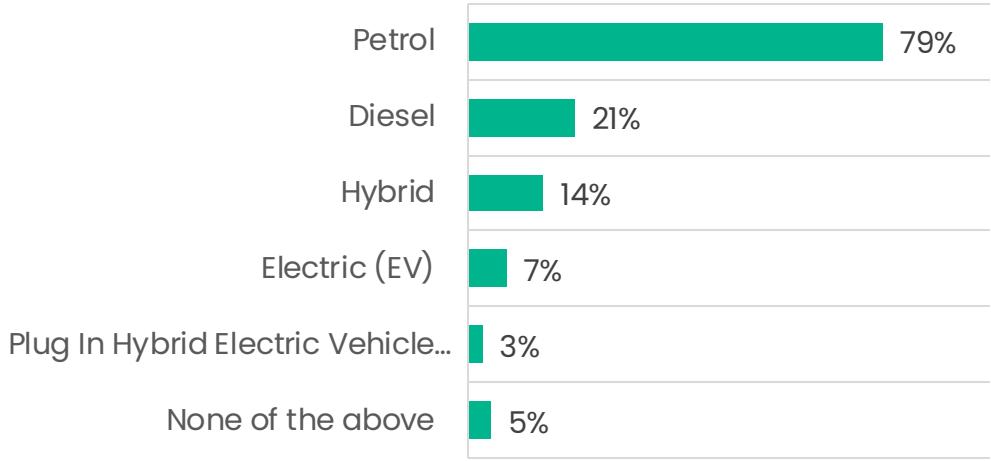
Electric vehicle (EV) adoption is growing, with 7% of people using EVs and 3% using plug-in hybrids.

Most EV users charge at home, highlighting the importance of residential charging infrastructure.

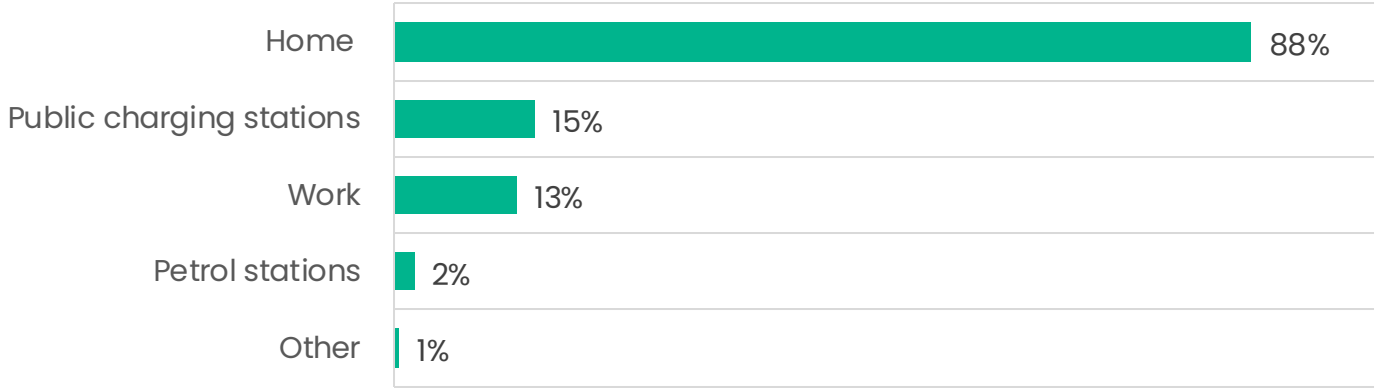
EV adoption increases with income.

Not surprisingly the *High Income & High Usage* segment respondents were more likely to have Evs.

CAR OWNERSHIP



EV CHARGING LOCATION



EV/PHEV car(s) normally charged at home:

86% **12%** **2%**

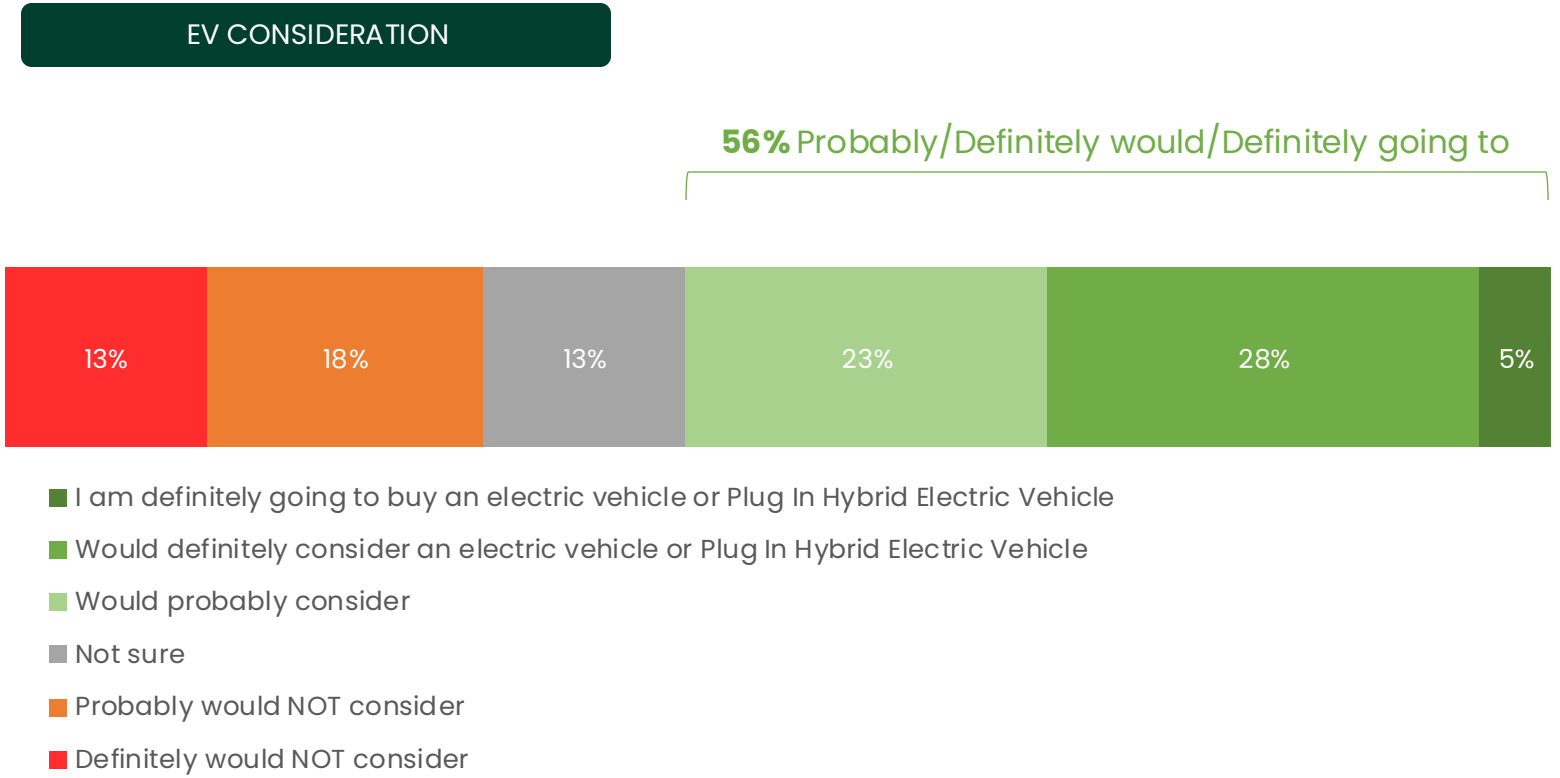
Q. Which of the following vehicle types do members of your household currently use for personal or business purposes? Base total n=1051
Q. Where do you normally charge your EV/PHEV car(s)? Base Hybrid and Electric Vehicle Users n=105
Q. How many EV/PHEV car(s) do you normally charge at home? Base Hybrid and Electric Vehicle Users charging at home n=92

Over half of non-owners would consider an EV/PHEV

Among non-EV owners, 56% would consider purchasing an EV or PHEV in the future. This suggests strong potential for growth in the electric vehicle market.

High income, younger and those with a mortgage were more likely to consider EVs.

High Income & Low Usage segment respondents are more likely to be strongly considering getting an EV as their next vehicle.



Q. If you were looking for a new car, how open would you be to owning an electric vehicle (EV) or Plug In Hybrid Electric Vehicle(PHEV)?
Base non-EV owners n=946

10% had solar at home. Most are satisfied.

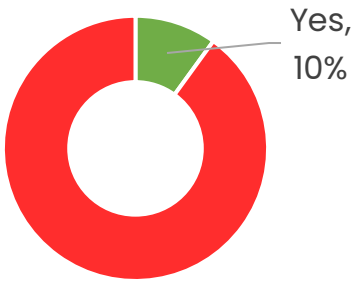
10% of Kiwis have solar panels at home, and satisfaction is high at 85%.

Over half of solar customers had batteries and a further quarter were open to buying them.

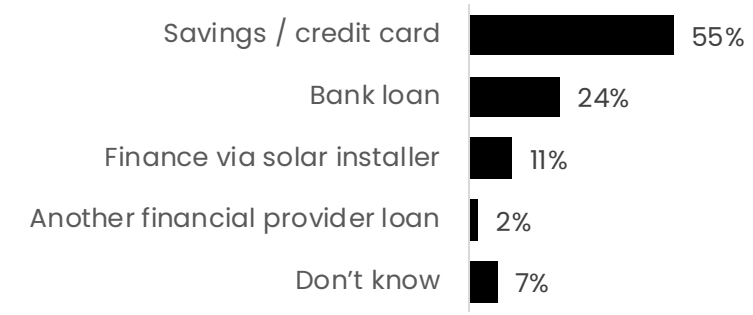
Solar was more common among over 65s.

While the *High Income & High Usage* segment respondents were no more likely than the respondents from the other segments to have Solar installed currently, they are much more likely to have Battery Storage.

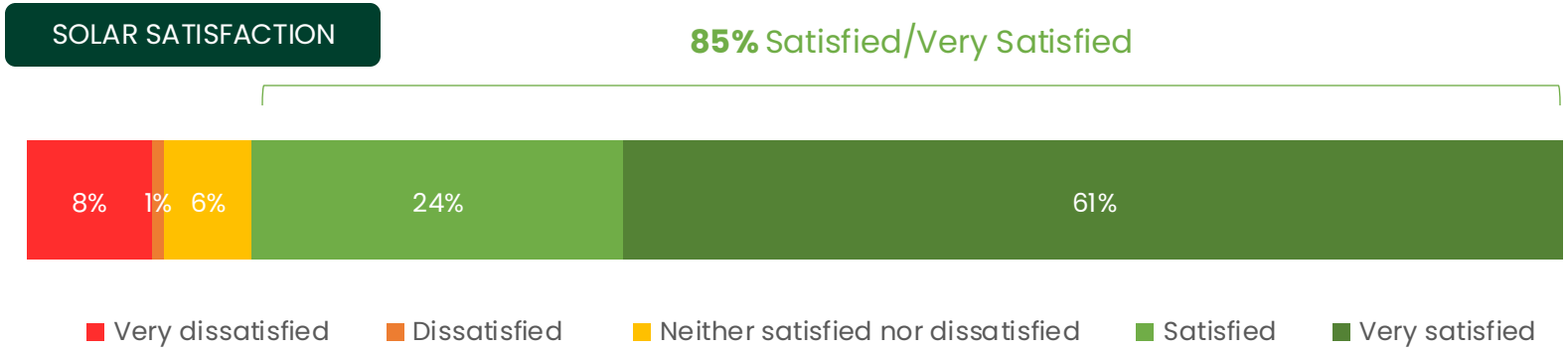
HAVE SOLAR AT HOME



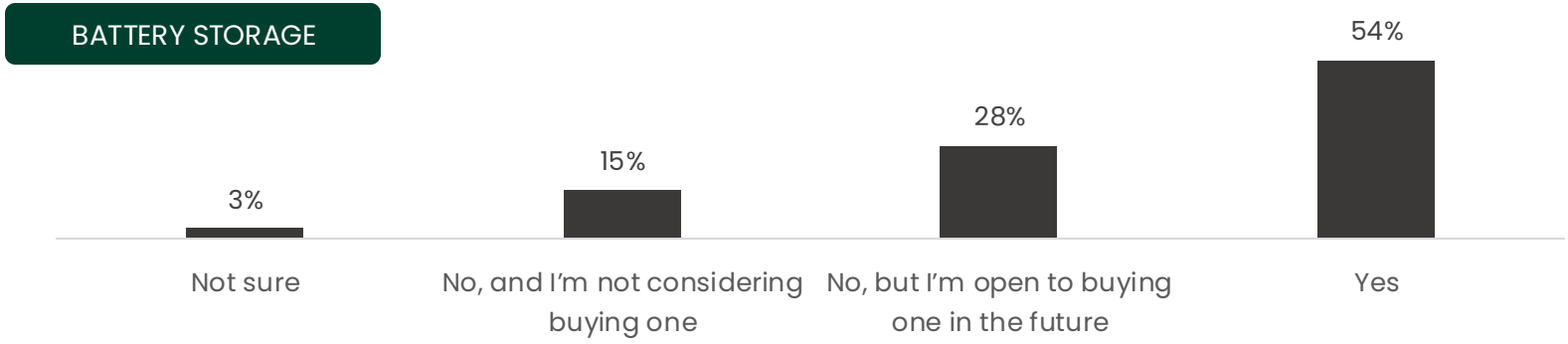
SOLAR PAID FOR BY



SOLAR SATISFACTION



BATTERY STORAGE

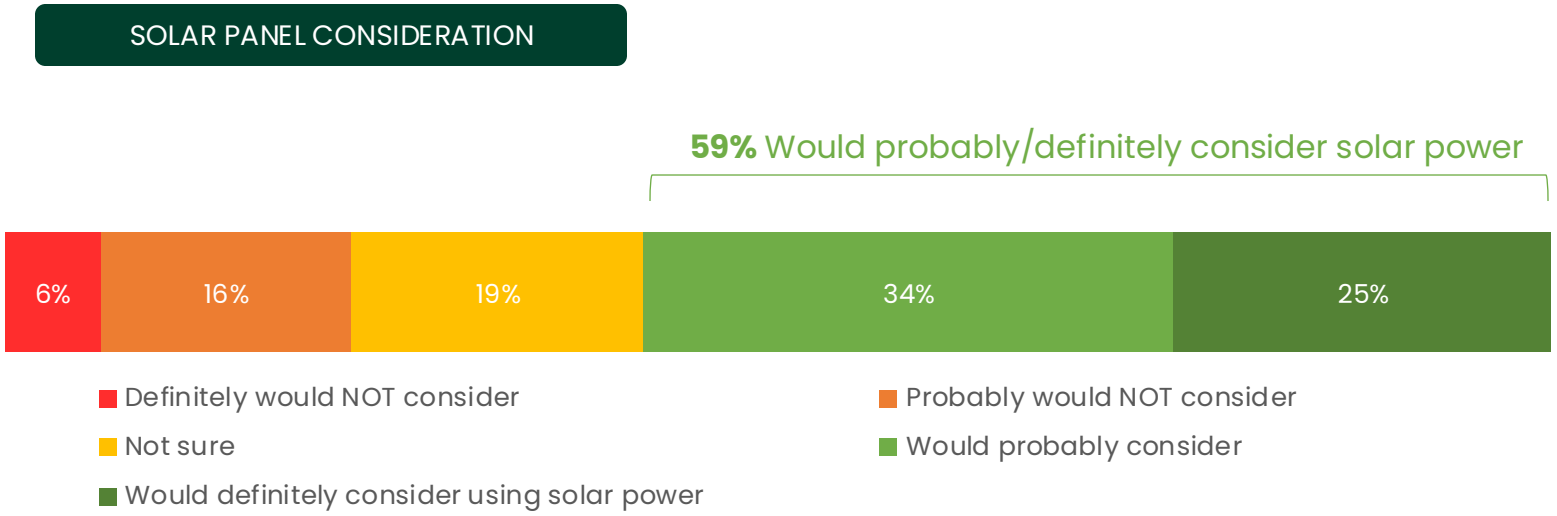


Q. Do you have solar panels at your home? Base n=1051
Q. How did you pay for your solar panels? Base n=109
Q. Overall how satisfied are you with your solar panels? Base n=109
Q. Do you have battery storage at home? Base n=109

6 in 10 non-owners would consider solar in the future

Interest in solar is strong, especially among under 55s, South Islanders, high income and homeowners.

The *High Income & High Usage* segment respondents are more likely to be strongly considering getting Solar Panels installed in the near future.



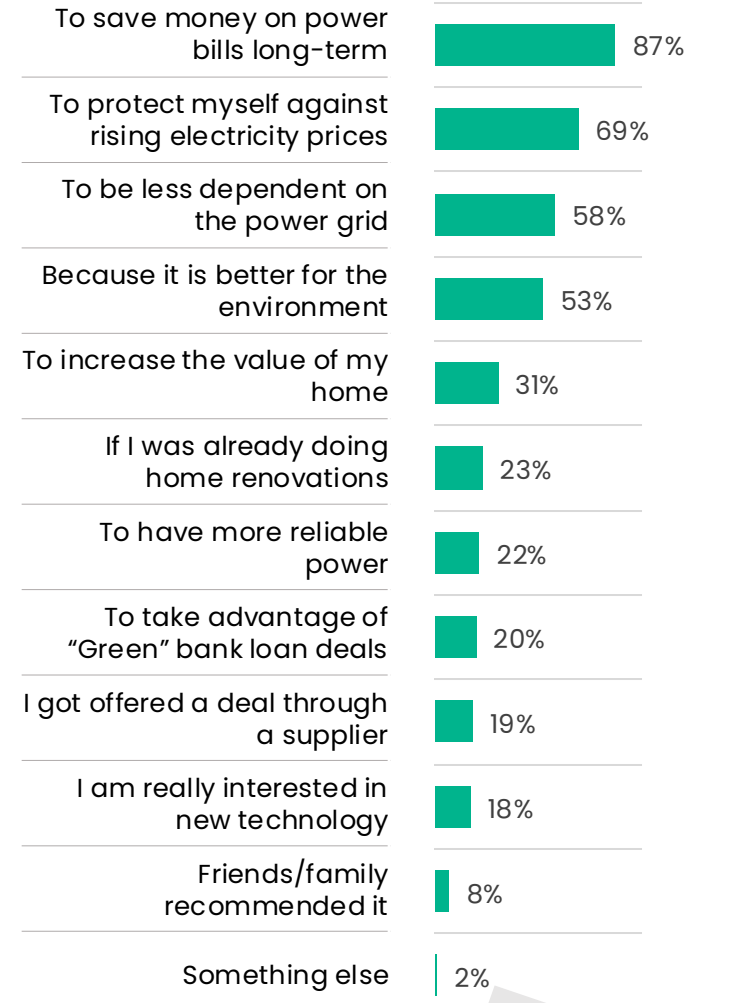
Q. Would you consider installing solar panels at your home in the future? Base n=728

Solar panel incentives and barriers

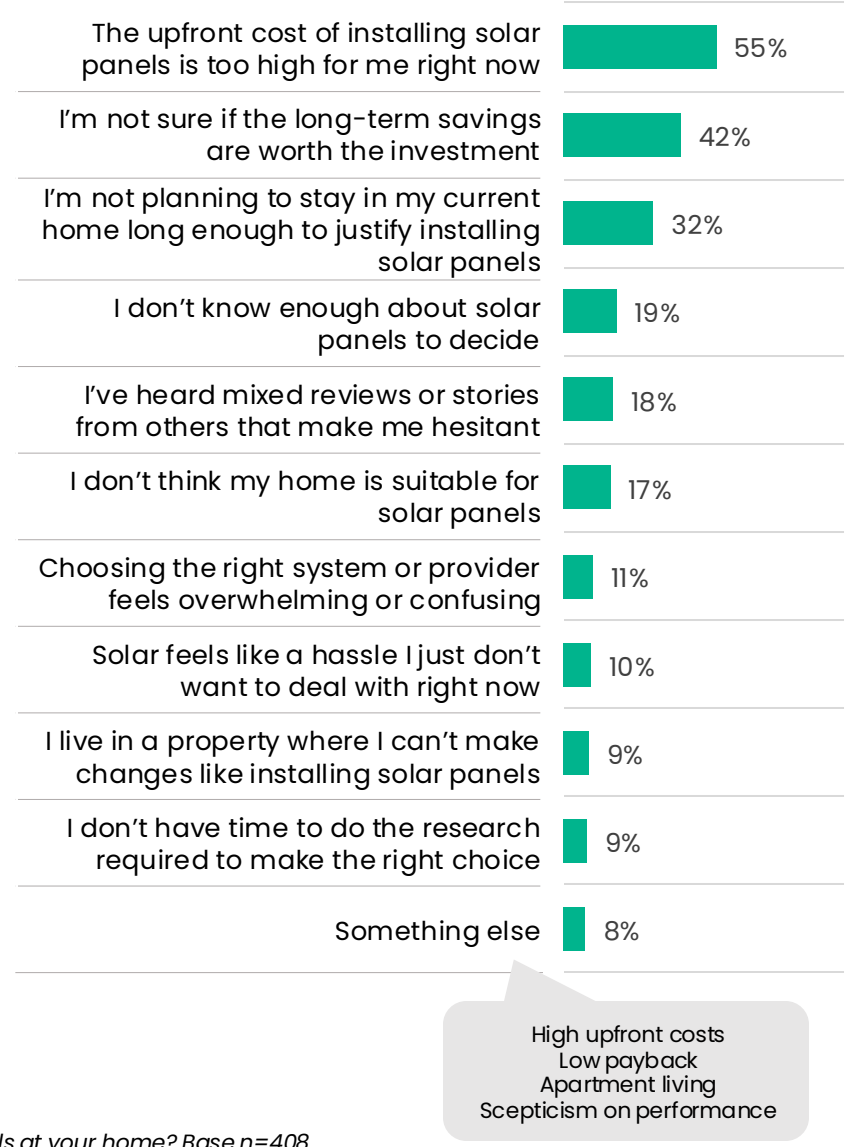
The main reasons for considering solar include cost savings and environmental benefits.

Main barriers include upfront costs and uncertainty about return on investment.

MAIN REASONS FOR CONSIDERING SOLAR



MAIN REASONS FOR **NOT** CONSIDERING SOLAR



Q. What are the main reason(s) you would consider installing solar panels at your home? Base n=408
Q. What are the main reason(s) you might not consider installing solar panels at your home? Base n=320

Considering Solar

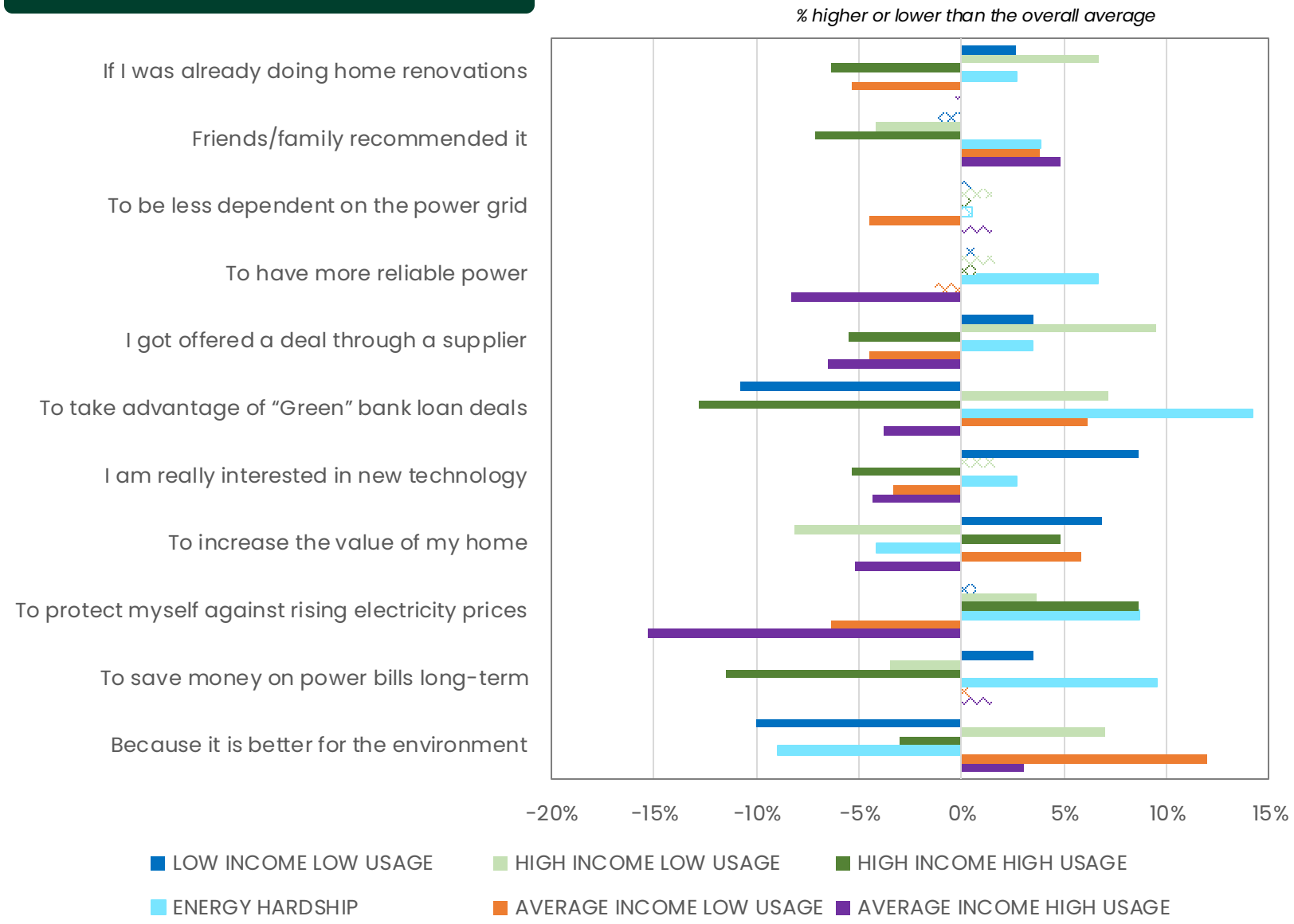
Segment Differences

The *High Income & High Usage* respondents are generally below average for all considerations with the exception of protecting themselves against power costs and improving the value of their homes.

Interestingly, the Low Usage segment respondents are more likely to flag more environmental concerns than the other segment respondents.

The *Energy Hardship* segment respondents are quite focused on the cost savings and taking advantage of green loans from their banks.

MAIN REASONS FOR CONSIDERING SOLAR



Q. What are the main reason(s) you would consider installing solar panels at your home?

NOT Considering Solar

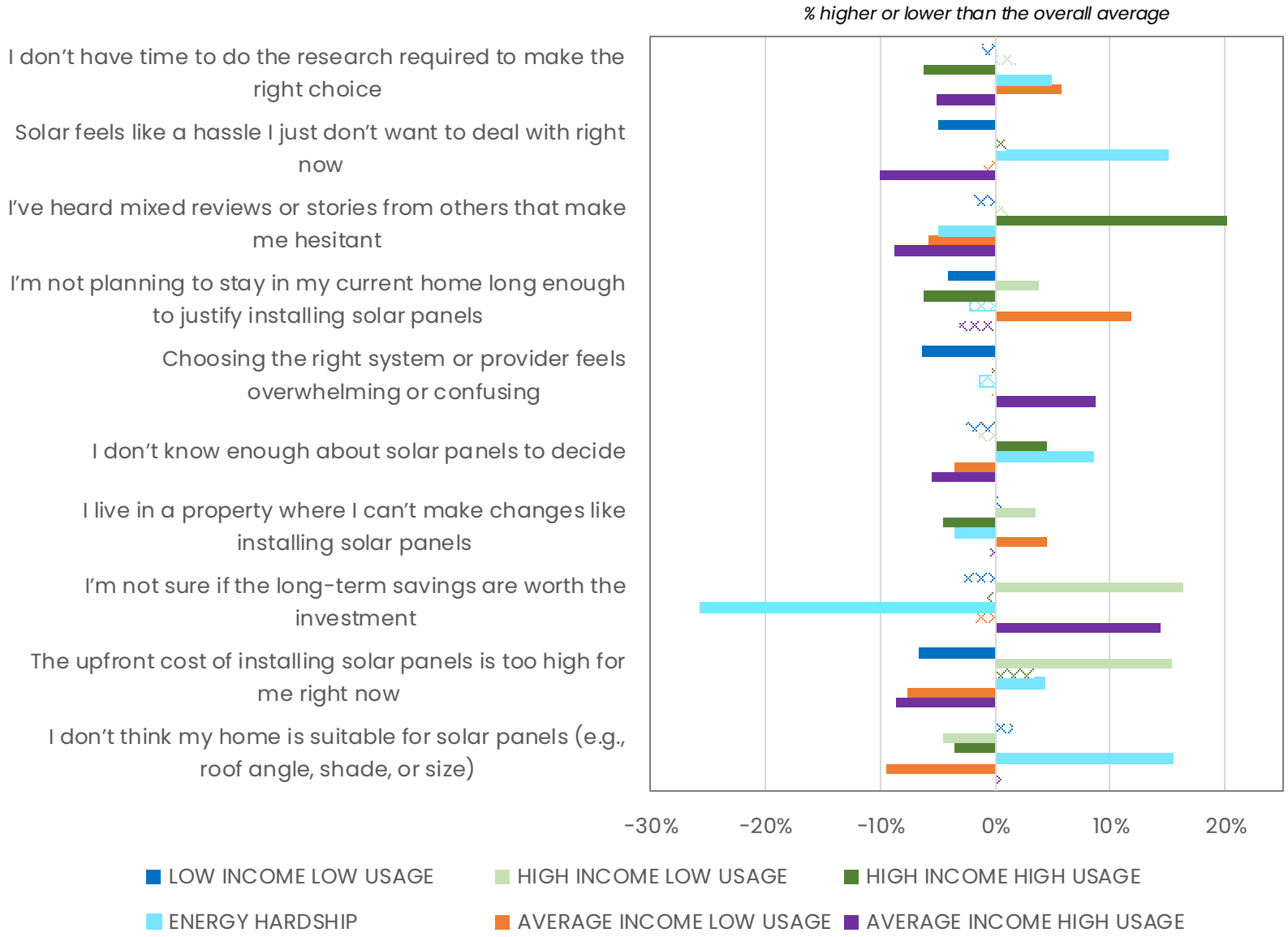
Segment Differences

The *High Income & High Usage* segment respondents we significantly more likely to cite hearing mixed reviews from others as a key driver for hesitating to get solar installed.

Respondents from the *Average Income & Low Usage* and *High Income & Low Usage* segments were much more likely to say that they were not in a home that they could either install solar panels onto or were not going to be there long enough to make it worth while.

The *Energy Hardship* respondents either didn't have time to research or deal with the hassle of researching and selecting a solar option or were pretty confident that their home wasn't suitable.

MAIN REASONS FOR **NOT** CONSIDERING SOLAR



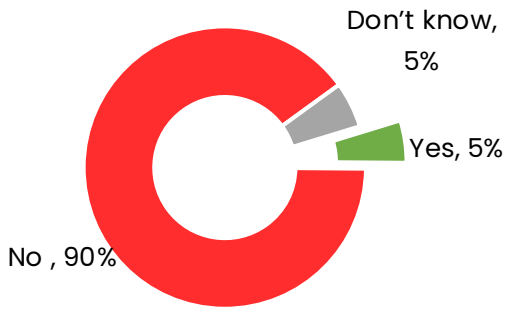
Q. What are the main reason(s) you might not consider installing solar panels at your home?

5% had a HEMS and 64% were satisfied with it

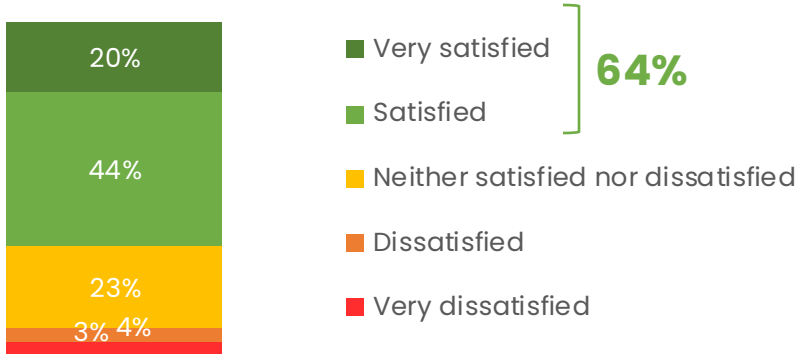
Ownership was driven by desire for information, control and cost savings.

Not surprisingly, the respondents from the *High Income & High Usage* segment are much more likely to have an HEM at home currently.

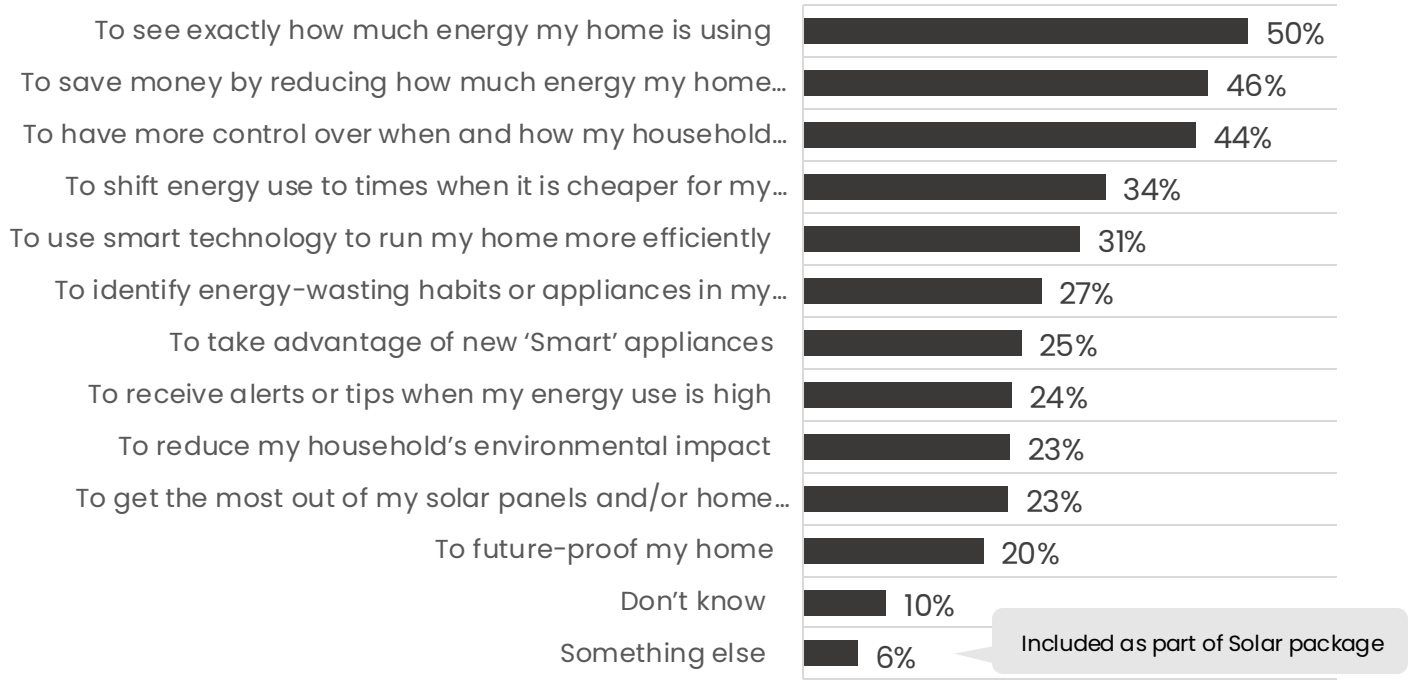
HAVE HEMS AT HOME



HEMS SATISFACTION



MAIN REASONS FOR INSTALLATION



Q. Do you have a home energy management system at your home to help manage your household's energy usage? Base n=1023
Q. Overall, how satisfied are you with your home energy management system? Base n=72
Q. What are the main reason(s) you have chosen to install an energy management system at your home? Base n=72

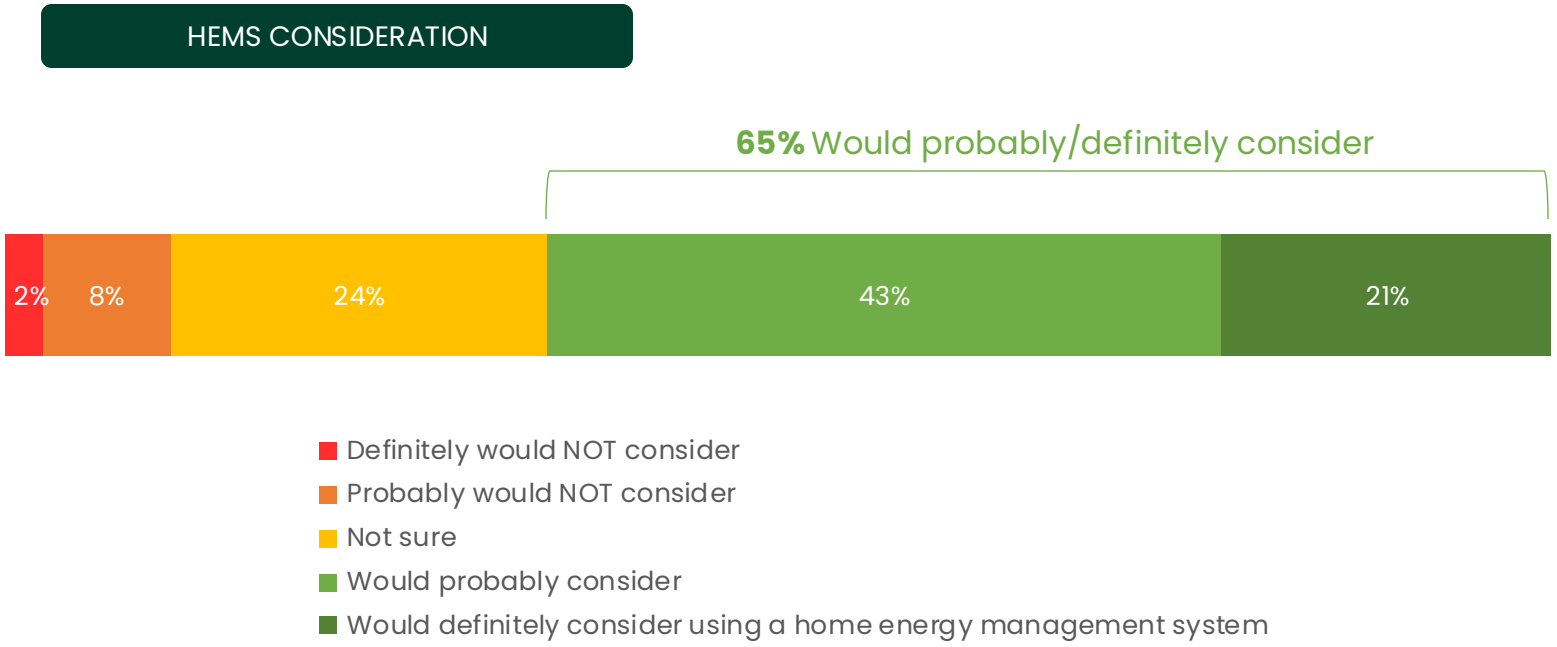
65% would consider a HEMS

Consideration was higher among under 45 year olds, higher incomes ($100k+), and mortgage holders.

Non-considerers were more likely to be over 65, and low income.

The respondents from the *High Income & High Usage* segment are again more likely to be strong considerers of getting an HEM in the future.

Somewhat surprisingly, the respondents from the *High Income & Low Usage* segment are also much more likely to be considering getting an HEM in the near future.



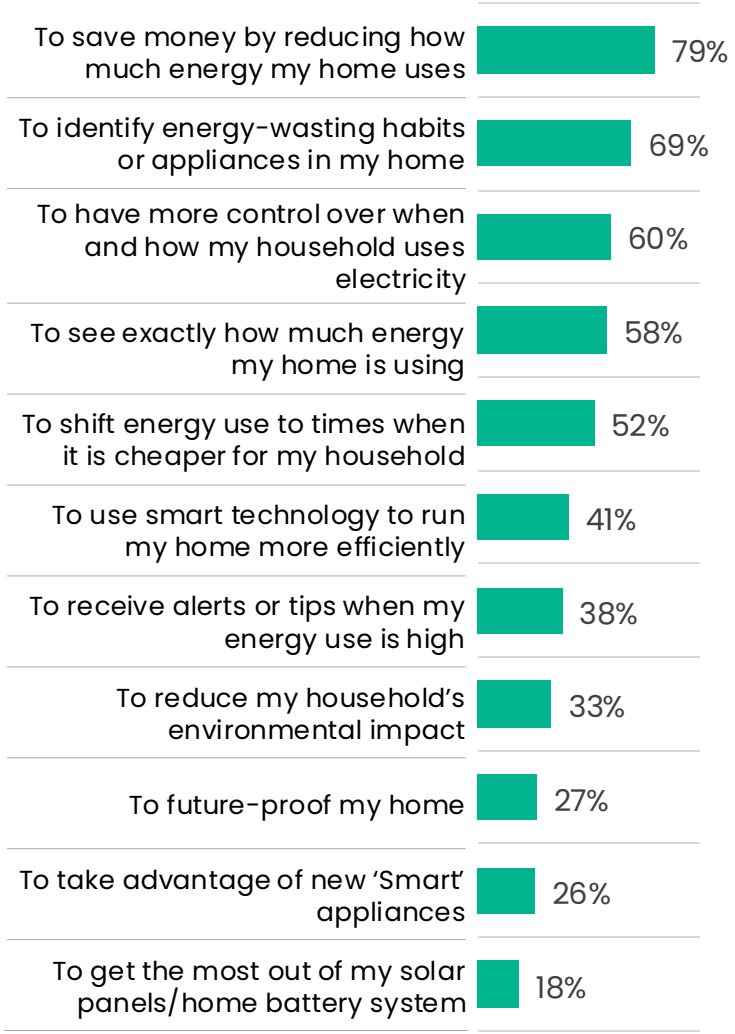
Q. Would you consider using a home energy management system at your home in the future? Base n=979

Incentives and barriers to installing HEMS

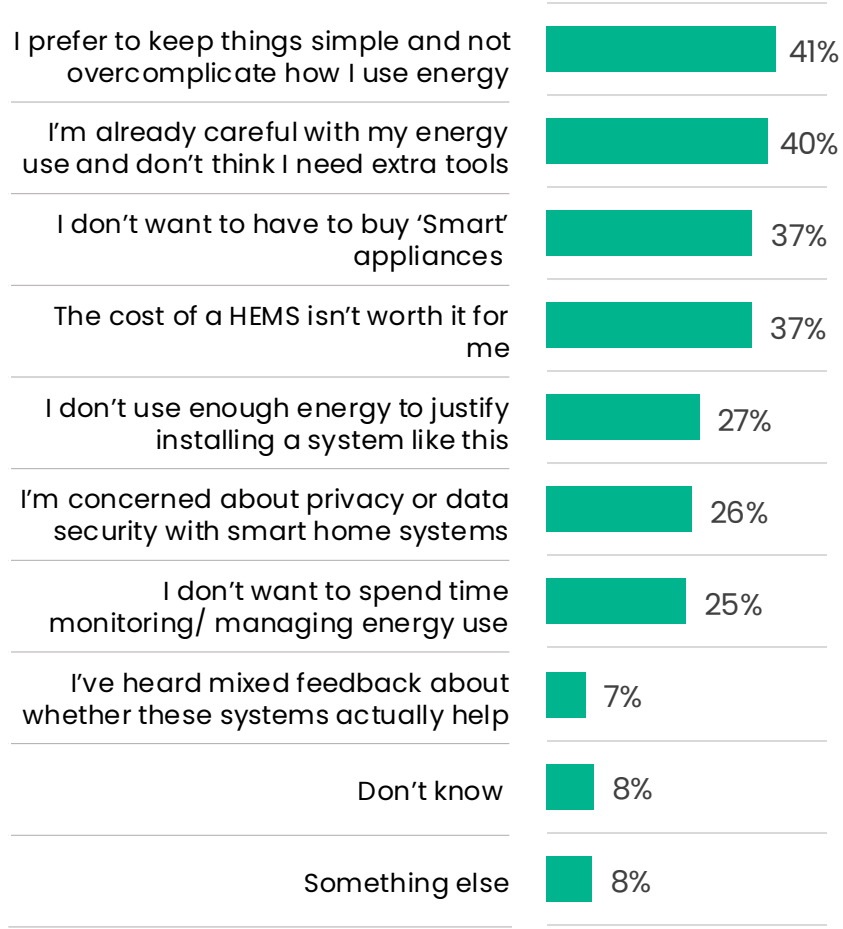
Motivations for HEMS consideration include cost saving, and increased information or control to help save costs.

Barriers include perceived complexity and lack of awareness.

MAIN REASONS FOR CONSIDERING HEMS



MAIN REASONS FOR **NOT** CONSIDERING HEMS



Renters/retirement villagers don't have control over install.
Older individuals uncomfortable with change.
High fixed charges or scepticism over rates.

Q. What are the main reason(s) you would consider installing a home energy management system at your home? Base n=618
Q. What are the main reason(s) you might not consider installing a home energy management system at your home? Base n=361

Considering HEMs

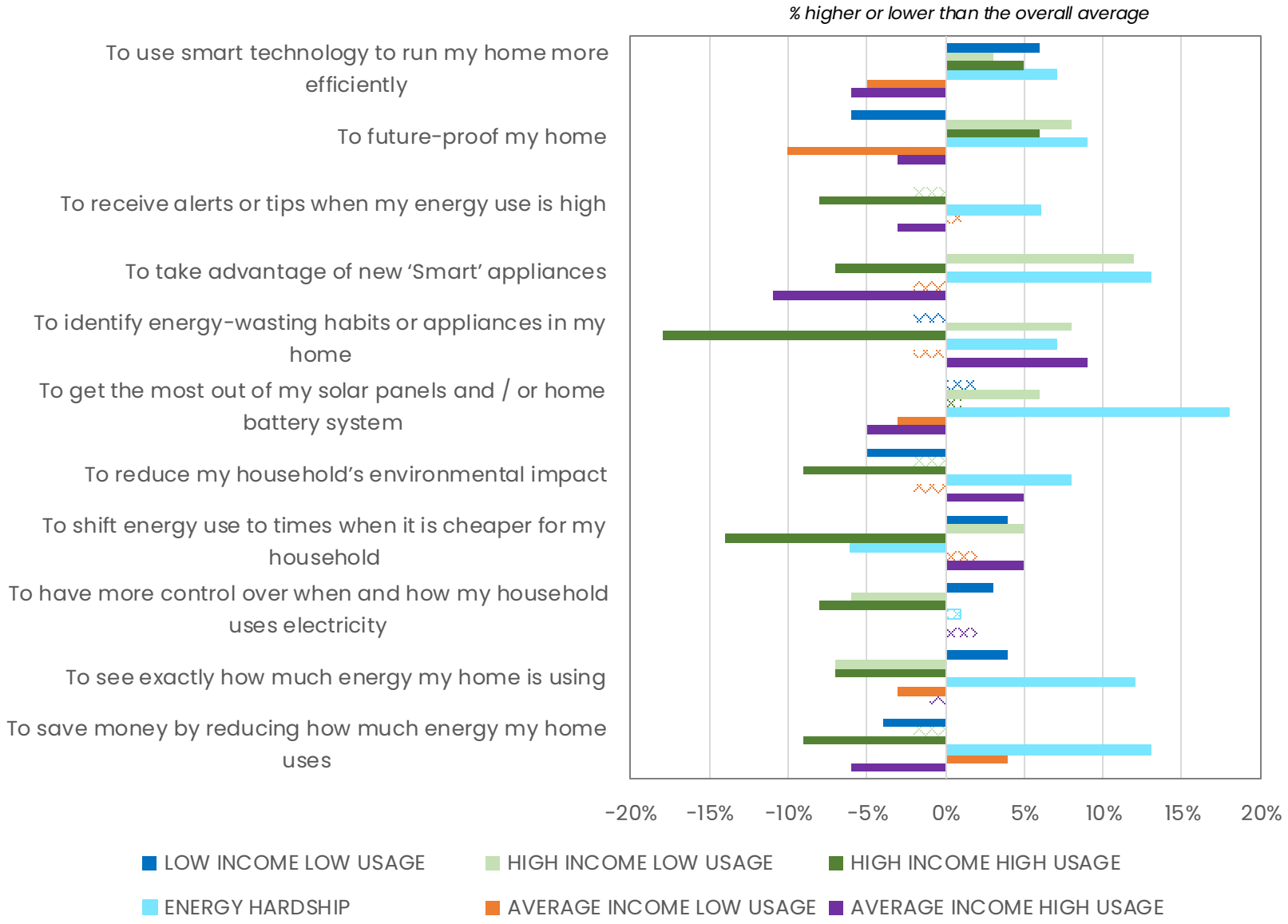
Segment Differences

Consistent with previous results, the *High Income & High Usage* respondents are below average for most considerations with the exception of running their home more efficiently and future-proofing their home.

The *High Income & Low Usage* respondents were above average for a number of key considerations revolving around being more proactive in managing their power usage.

The *Energy Hardship* respondents were above average for all considerations except for shifting their energy usage to times that are cheaper.

MAIN REASONS FOR CONSIDERING HEMS



Q. What are the main reason(s) you would consider installing a home energy management system at your home?

NOT Considering HEMs

Segment Differences

The *High Income & High Usage* respondents are generally well below average for considering any of the barriers as reasons for not considering getting an HEM for their home.

Respondents from the *Average Income & Low Usage* segment are more likely to see a wide range of barriers to getting HEMs for their home – especially costs and return on investment.

Interestingly, the respondents from the *High Income & Low Usage* and *Energy Hardship* segments are much more likely to cite 'keeping things simple' in terms of how they use energy.

MAIN REASONS FOR **NOT** CONSIDERING HEMS

Q. What are the main reason(s) you might not consider installing a home energy management system at your home?

contact

- Shawn Henry | Director
- Shawn.henry@insightshq.co.nz
- 021 309 417

INSIGHTS HQ