

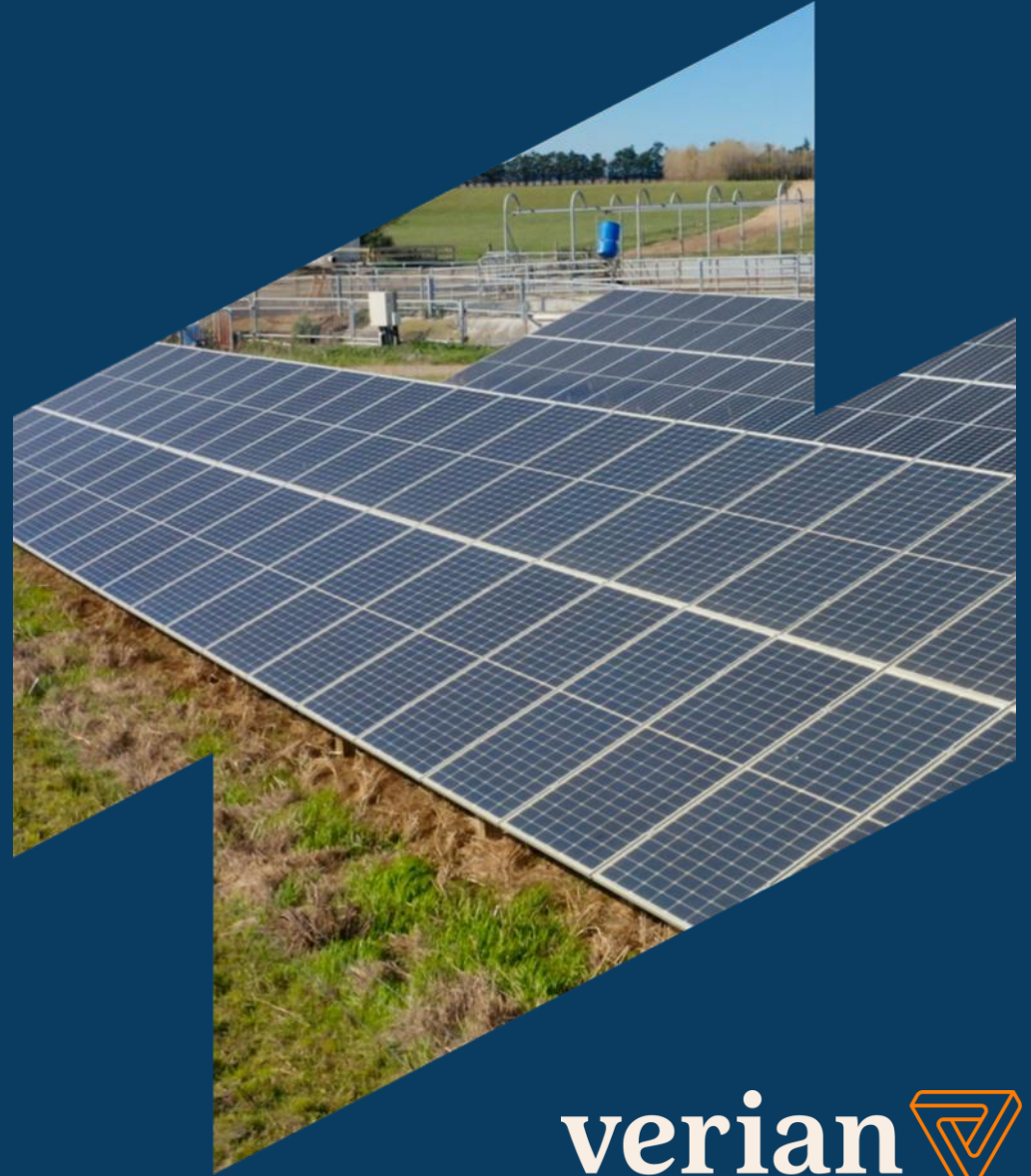
June 2026

Solar installers Research

Exploring the solar industry landscape from the installer perspective - their market perceptions, constraints and challenges.

Research conducted by Verian

EECA ENERGY EFFICIENCY &
CONSERVATION AUTHORITY
TE TARI TIAKI PŪNGAO



verian 

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Research approach

EECA aims to ensure New Zealand's growing solar market delivers high quality installations, strong consumer confidence, and sufficient installer capacity by gaining deeper insights into the landscape of solar PV installers. This includes understanding the structure, behaviour, capabilities, and support needs of electricians installing solar across the country.

To build this evidence base, EECA commissioned a nationwide quantitative survey examining how installers operate commercially, select suppliers, perceive market trends, scale their businesses, and engage with training and accreditation, as well as the information or support they require.

The research findings will inform decisions on accreditation settings, market development interventions, and targeted support to strengthen the solar installation ecosystem.



Target audience: The target audience for the survey was electricians and known solar installers that are main or joint decision makers in their business. Electricians who are not solar installers were included so that we could ask them a few short questions to understand barriers to installing solar.



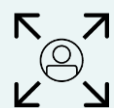
Fieldwork dates: Fieldwork was conducted between 1 April and 6 May 2026.



Method: An online survey was conducted with electricians from a variety of sources:

- A list of solar installers provided by EECA
- Sourced from publicly available databases
- The Martins database of electricians with email addresses.

To encourage participation in the research respondents were (a) entered into a prize draw for a \$1,000 Prezzy card, and (b) given a choice between a \$20 eGift card or the equivalent donation to one of three charities. We also sent reminder emails to non-respondents, and called those we knew were solar installers.



Sample composition and response rate: A total of 2,459 invitations were successfully sent, and 281 people completed the survey, proving a response rate of 11.4%.

Solar installers	N=156
Electricians that don't install solar	N=115
Supplier of solar equipment	N=10

Summary of findings

Installer landscape

The installer base is young, flexible, and only partially specialised, meaning there is clear headroom to grow solar uptake by lifting solar's share of work within existing businesses and supporting expansion into more complex (e.g. commercial) jobs.

The solar installer base is relatively new, with many businesses only established in the past few years, indicating a still-maturing market with potential to scale as capability and experience deepens.

Solar installers tend to operate with larger or more flexible workforces than traditional electricians, suggesting a stronger ability to respond to increases in demand.

Only a small minority of businesses are fully specialised in solar, with most balancing it alongside broader electrical work - pointing to a potential room to grow solar as a larger share of revenue.

While residential work is near-universal, commercial activity is concentrated among a subset of larger installers, highlighting a key growth opportunity that may be constrained by capability or scale.

Market potential

A meaningful pool of “near-ready” installers exists - meaning growth in solar uptake may depend less on creating capacity, and more on activating and supporting it.

Demand is expected to keep growing, and most installers believe they have capacity to respond - suggesting supply is not the primary short-term constraint.

Beneath the current market sits a sizeable pool of small, non-solar electricians - many of whom already have the capability to install solar but are not currently doing so.

Willingness to enter the market is high, with many open to expansion if barriers like training, support, or confidence are addressed.

This points to latent capacity that could be activated relatively quickly, rather than needing to build a workforce from scratch.

Market challenge

Solar growth is constrained at both ends - installer capability limits delivery, while customer confusion slows conversion of demand into installs.

Installers widely perceive the market as competitive, meaning growth will depend on capability, quality, and customer experience - not just underlying demand.

Workforce constraints are the most consistent pressure point, with shortages in skilled labour limiting how quickly businesses can scale and take on more work.

These capability gaps are most acute for more complex work, with commercial installations and newer technologies (e.g. batteries) requiring higher skill levels and confidence.

At the same time, customer confusion (particularly when comparing quotes, choosing system size, and assessing value) is seen as a key barrier to conversion, slowing uptake even where interest exists.

Together, this creates a dual constraint: supply-side limits on delivery, and demand-side friction at the point of decision.

Accreditation

There is strong underlying support for accreditation, but uptake will depend on making it feel additive rather than duplicative, with clear, tangible value for installers.

Three in four installers (72%) consider an EECA-led accreditation at least a fairly good idea, with support largely driven by a belief it would lift quality, consistency, and trust across the industry.

However, this support is not unconditional — concerns are concentrated around duplication with existing schemes, particularly SEANZ, and the additional cost and effort for already stretched small businesses.

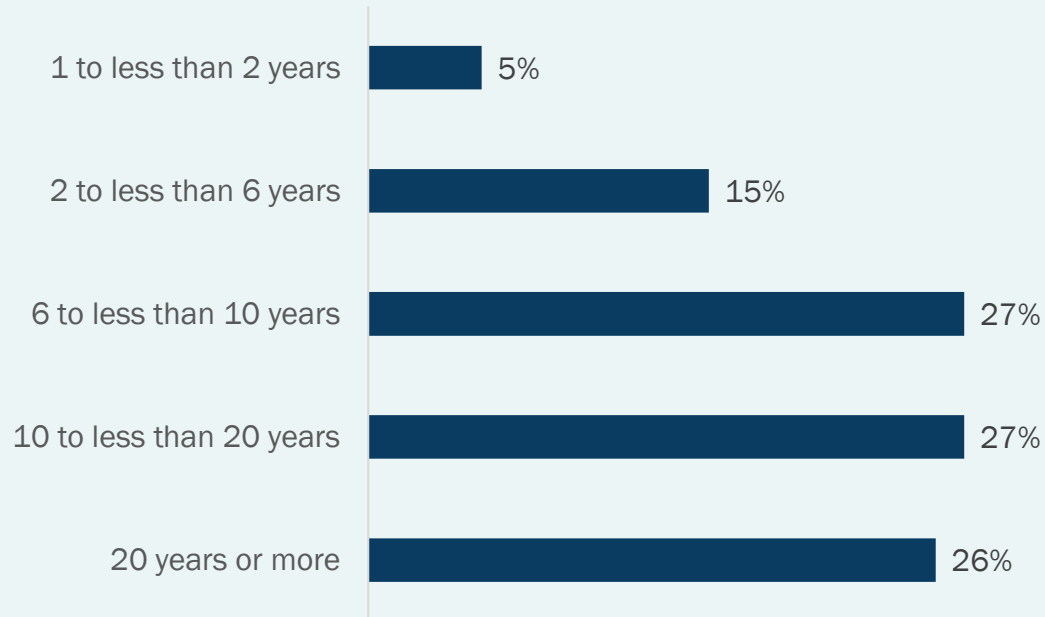
If EECA was to establish their own accreditation, success will be more likely if this considers:

- Aligning with the already existing SEANZ certification
- Balancing (additional) costs for businesses
- Ensuring recognition from banks and financiers
- Weighing up accrediting individuals vs businesses
- Clearly communicating the practical value to installers

1. Solar installer landscape

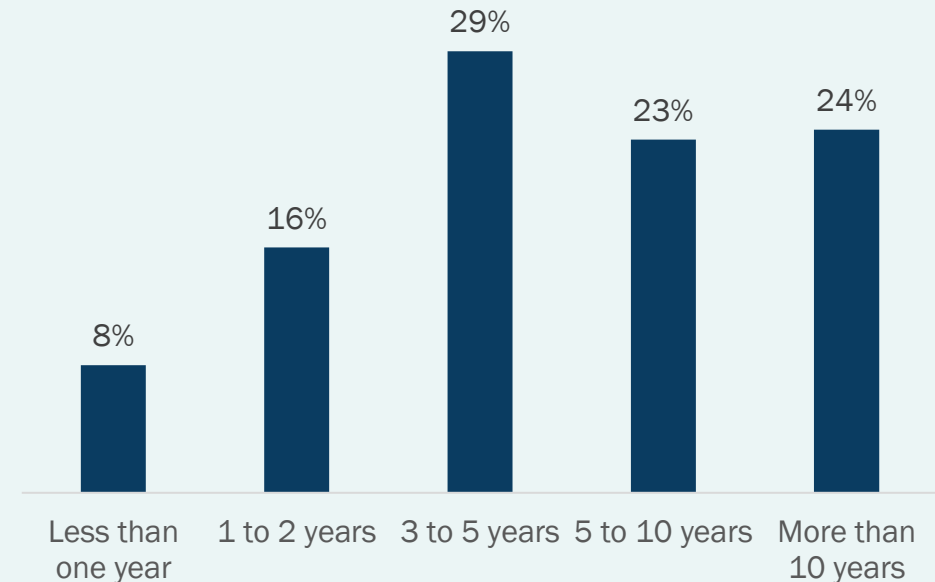
Almost half of solar installation businesses are less than ten years old, while just over half of solar installers have been working in the solar sector for fewer than five years.

Age of business



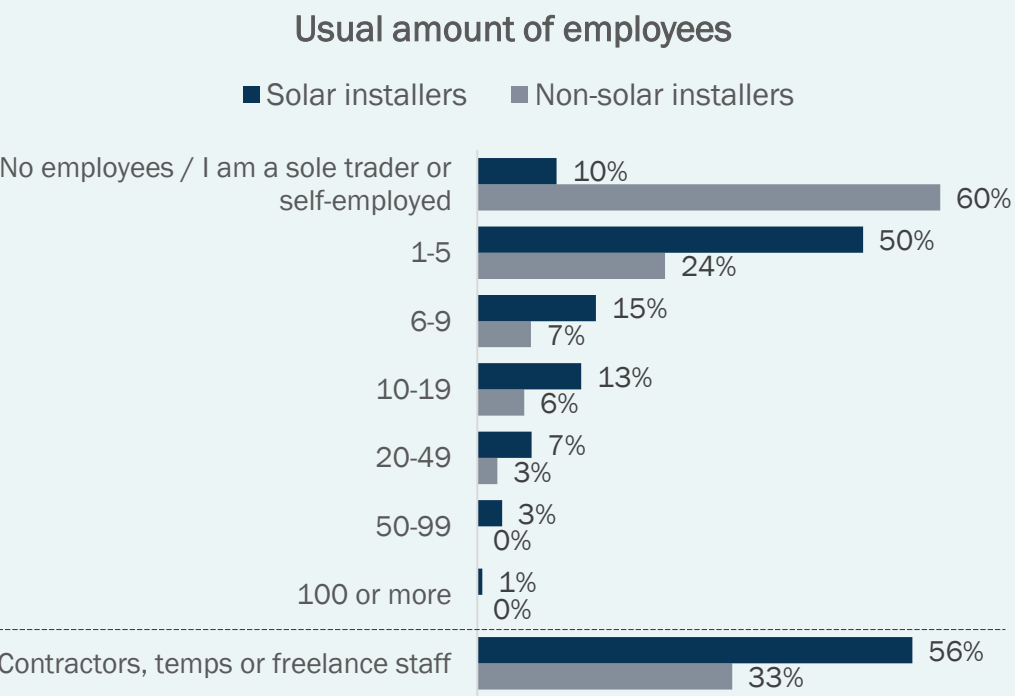
Source: S2 For how many years has your business operated?
Base: Solar installers (N=156); Non-solar installer (N=115)

Duration working with solar

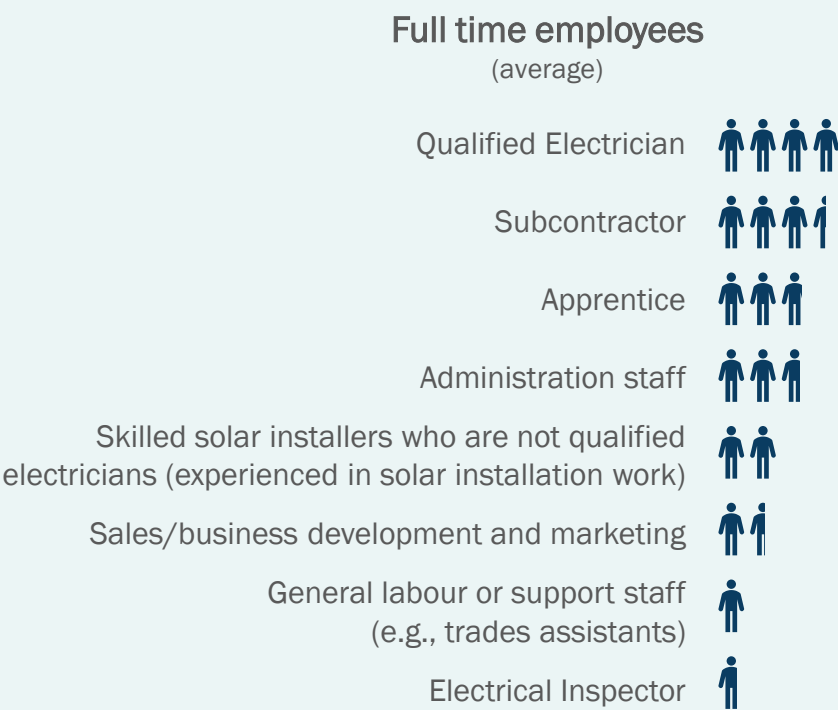


Source: S7 For how many years has your business installed, supplied or marketed/sold solar?
Base: Solar installers (N=156)

While non-solar electrical businesses are predominantly sole traders, solar installers are more likely to employ staff, typically operating with teams of one to five.

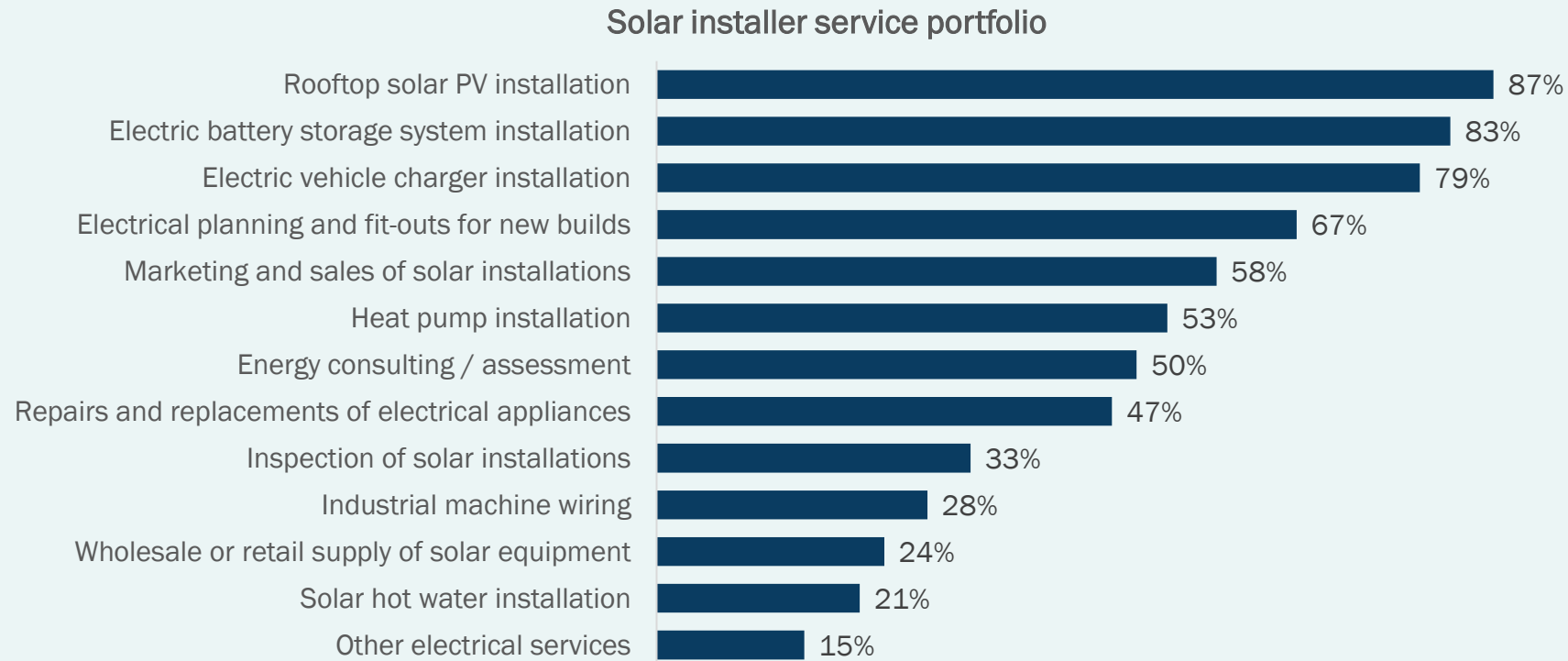


Source: S3 Not including the owner, how many people are usually employed in your business?
S4 Does your business currently employ any contractors, temps or freelance staff?
Base: Solar installers (N=156); Non-solar installer (N=115)



Source: S5 How many Full Time Equivalent (FTE) employees does your company have each in the following roles?
Base: Solar installers (N=156)

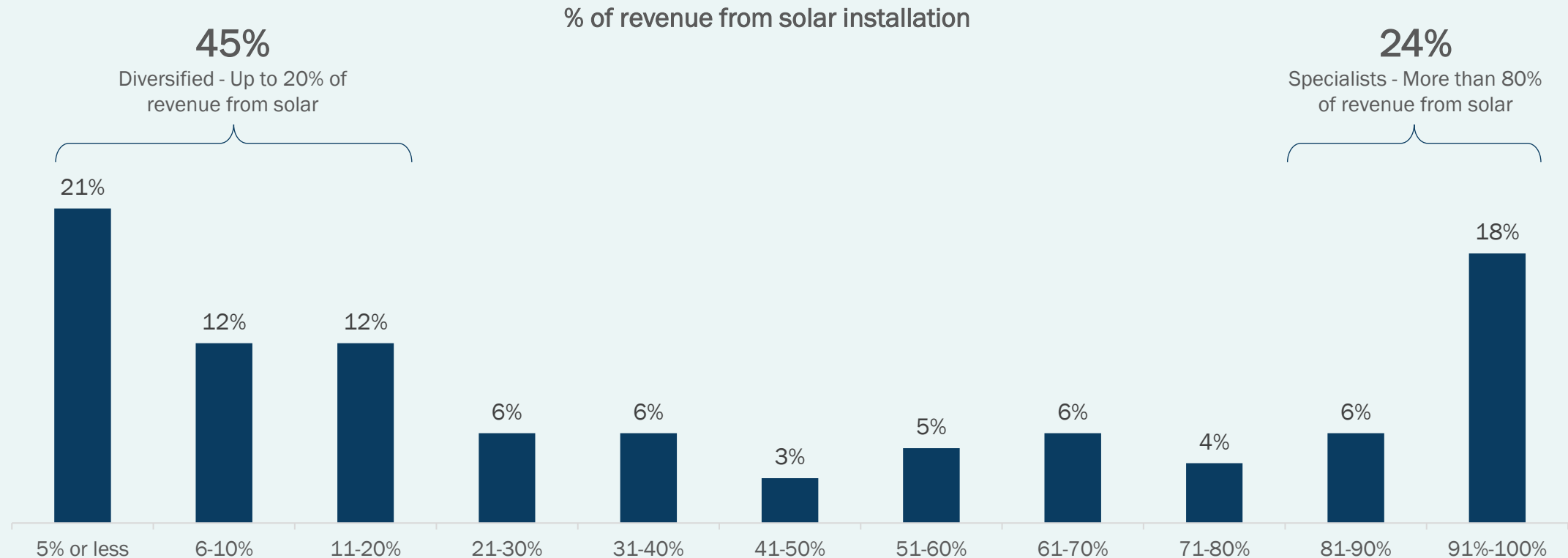
For solar installers, rooftop solar sits at the core of a broader service offering that spans storage, EV charging, and wider electrical work.



Source: S6 Which of the following services does your business provide?

Base: Solar installers (N=156)

The market appears split between diversified businesses for whom solar is a modest revenue stream and specialists who derive almost all revenue from solar work.

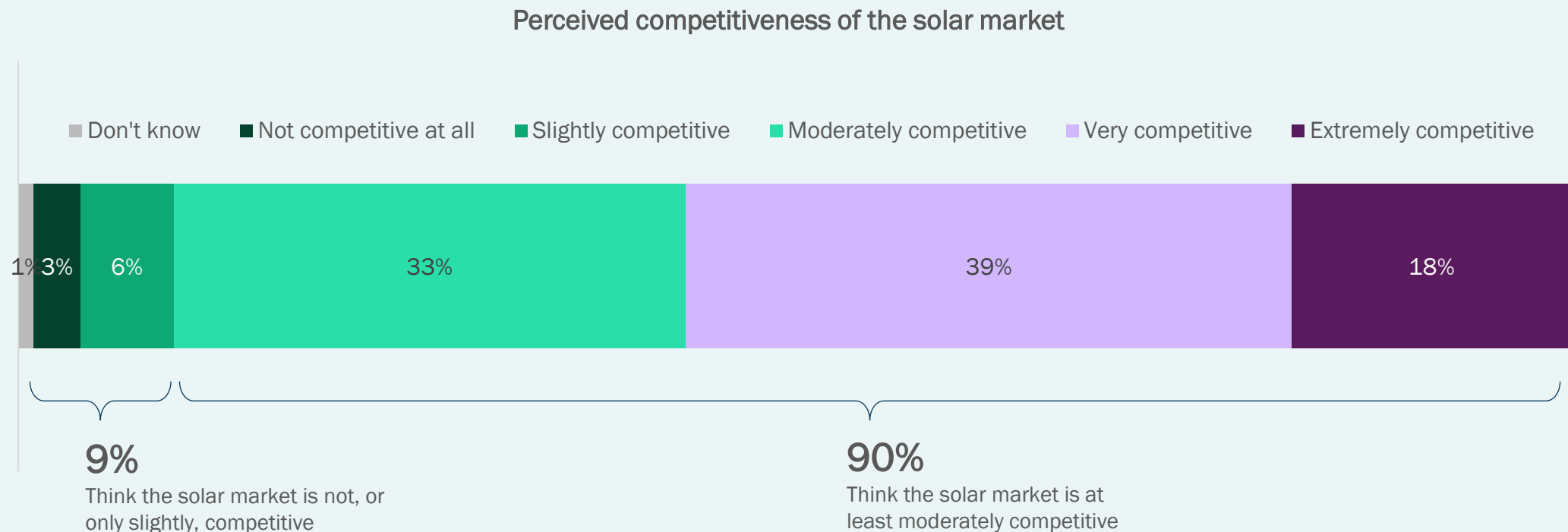


Source: Q2a Over the last 12 months, roughly what percentage of your business revenue has been from solar?

Base: Solar installers (N=156)

Note: N=1 "Don't know" not displayed.

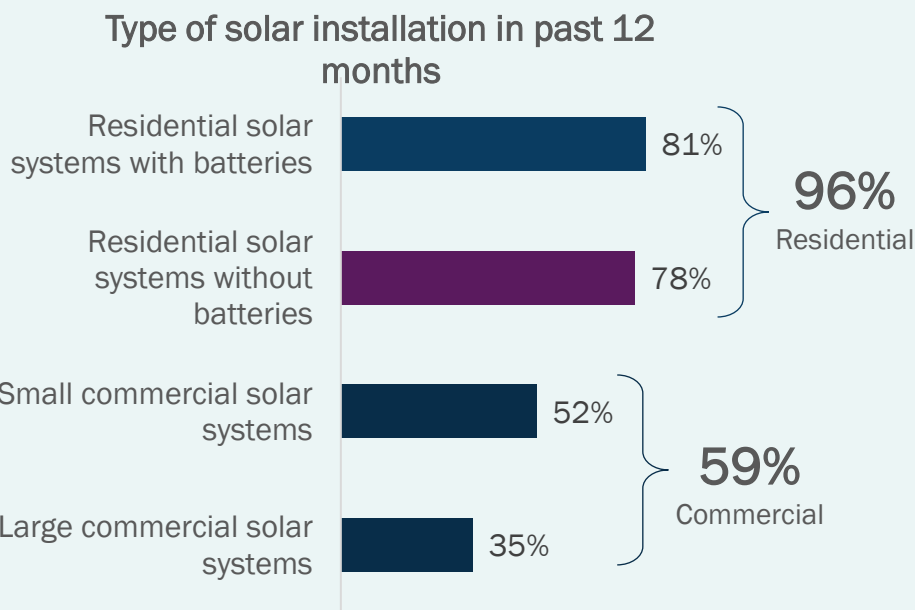
Most solar installers believe the market is at least moderately competitive.



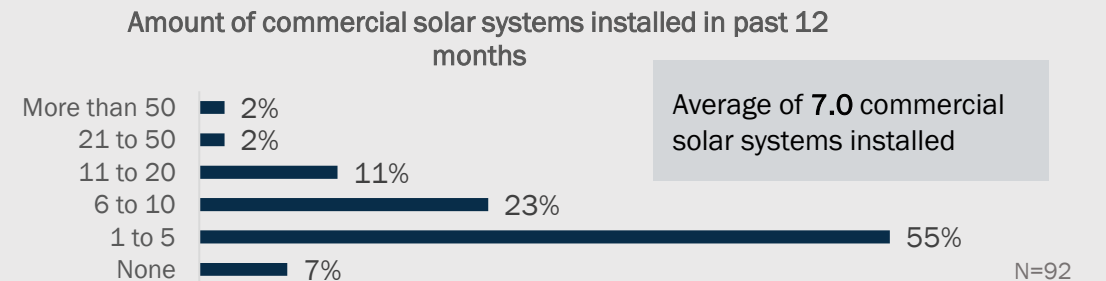
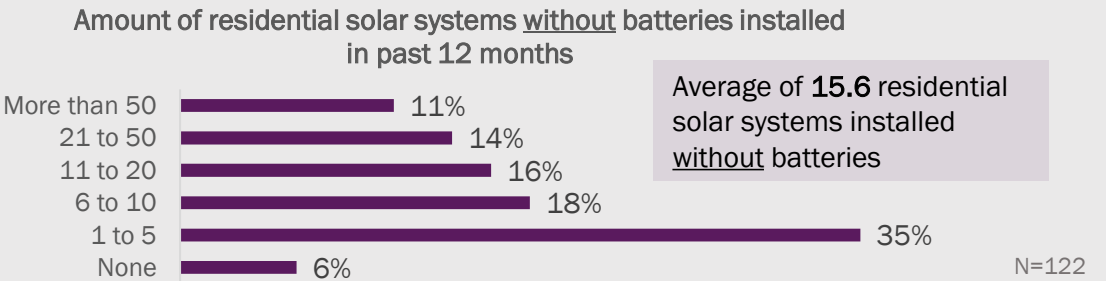
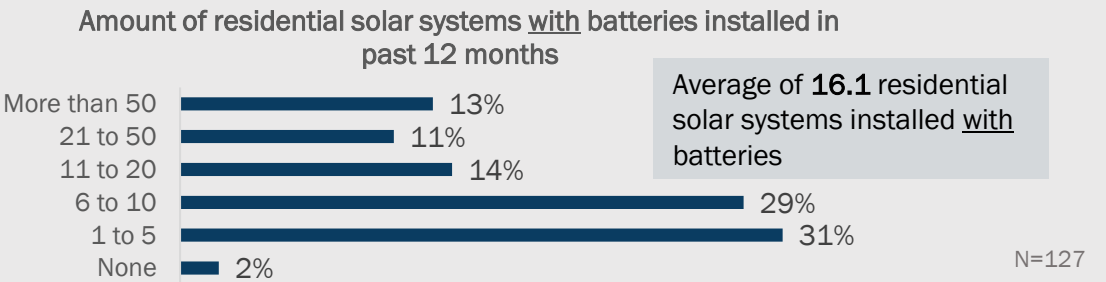
Source: Q1e How competitive do you consider the solar market in your region?
Base: Solar installers (N=156)

Almost all installers completed residential projects in the past 12 months, while 59% also delivered commercial installations.

Businesses working in commercial installations tend to be larger – 53% have at least 6 or more employees.



Source: Q2b Which of the following has your business installed in the past 12 months?
Base: Solar installers (N=156)



Source: Q2e About how many solar systems without batteries has your business installed in the past 12 months for residential customers?
Q2f About how many solar systems with batteries has your business installed in the past 12 months for residential customers?
Q2g About how many solar systems has your business installed in the past 12 months for commercial customers?

Battery cost is considered the main barrier to expanding into residential battery systems, while skills are the key barrier for commercial expansion.

Demand and capacity are also high barriers to expanding into commercial systems.

Two main barriers are mentioned for expanding into residential systems with batteries:

The price of batteries...

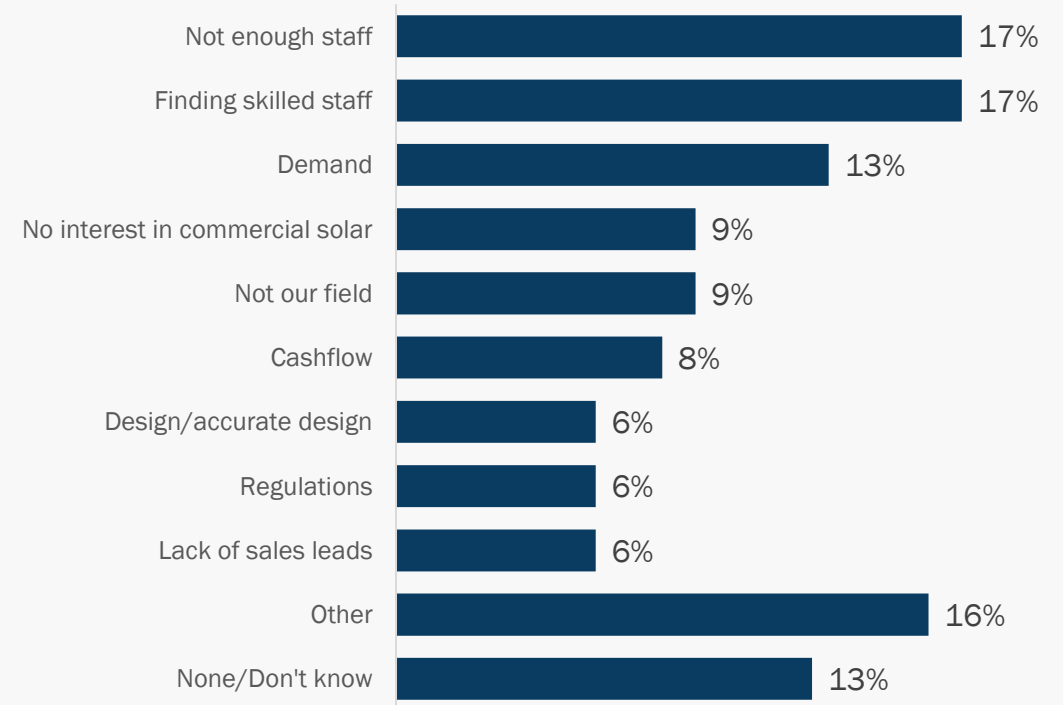
“ Correct sizing and cost of batteries.
Overall cost and location limitations.
Battery storage density vs cost. Too expensive. ”

...and the performance and size of batteries

“ Separating hype from actual performance/ROI.
The cost of the batteries, the limited supply capacity of the battery to the house. ”

Source: Q2c What are the main barriers for expanding into residential systems with batteries?
Base: Solar installers that have installed residential solar system without batteries in the past year (N=23)
Note: Interpret with caution due to small base size.

Barriers to expanding into commercial systems:



Source: Q2d What are the main barriers for expanding into commercial systems? (coded)
Base: Solar installers that have not installed a commercial solar system in the past year (N=64)
Note: Interpret with caution due to small base size.

Solar installers' perception of the NZ solar market

Most solar installers expect demand to increase over the next year, but not at the same rate as the previous year, so there appears to be a perception that demand may ease in the future.

Those who perceived a decrease in the past 12 months work almost exclusively in solar hot water installation.

% of perceived past and future demand increase



Source: Q1a Firstly, over the past 12 months, would you say demand for solar systems in your market has... For how many years has your business operated? / Q1b By approximately what percentage has it [increased/decreased]? / Q1f Now thinking about the next 12 months, do you think demand for solar in your market will... / Q1g By approximately what percentage do you think it will [increase/decrease]?

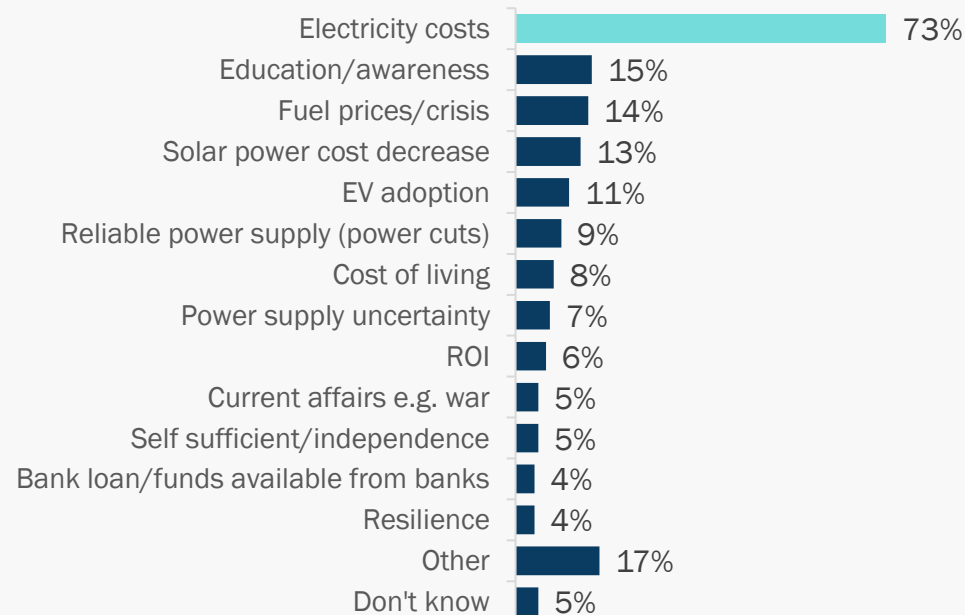
Base: Solar installers (N=156)

Note: Q1a/Q1f not adding up to 100% because "Don't know" not displayed; Q1a (N=1); Q1f (N=4).

Rising electricity costs are considered the main driver of demand for solar.

Installers also highlight the role of increased awareness and knowledge, e.g., through peer influence, as more households see solar adopted within their communities.

Reasons for past 12 months demand increase



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Cyclones, cost of electricity, cost of fuel and moving to EVs, more people have got solar so are telling others about it.
(Solar installer, Hawke's Bay)

Electricity bill cost increases; NZ public are now better educated about the cost benefit of solar; Better technology meaning that the payback period is shorter (and reasonable); Low interest bank loans; People realising that we are now past the early adopter stage and we are moving into the mass adoption stage of solar; People referring others i.e., people seeing that their neighbour/friend has solar and so they want it also.
(Solar installer, Manawatū-Whanganui)

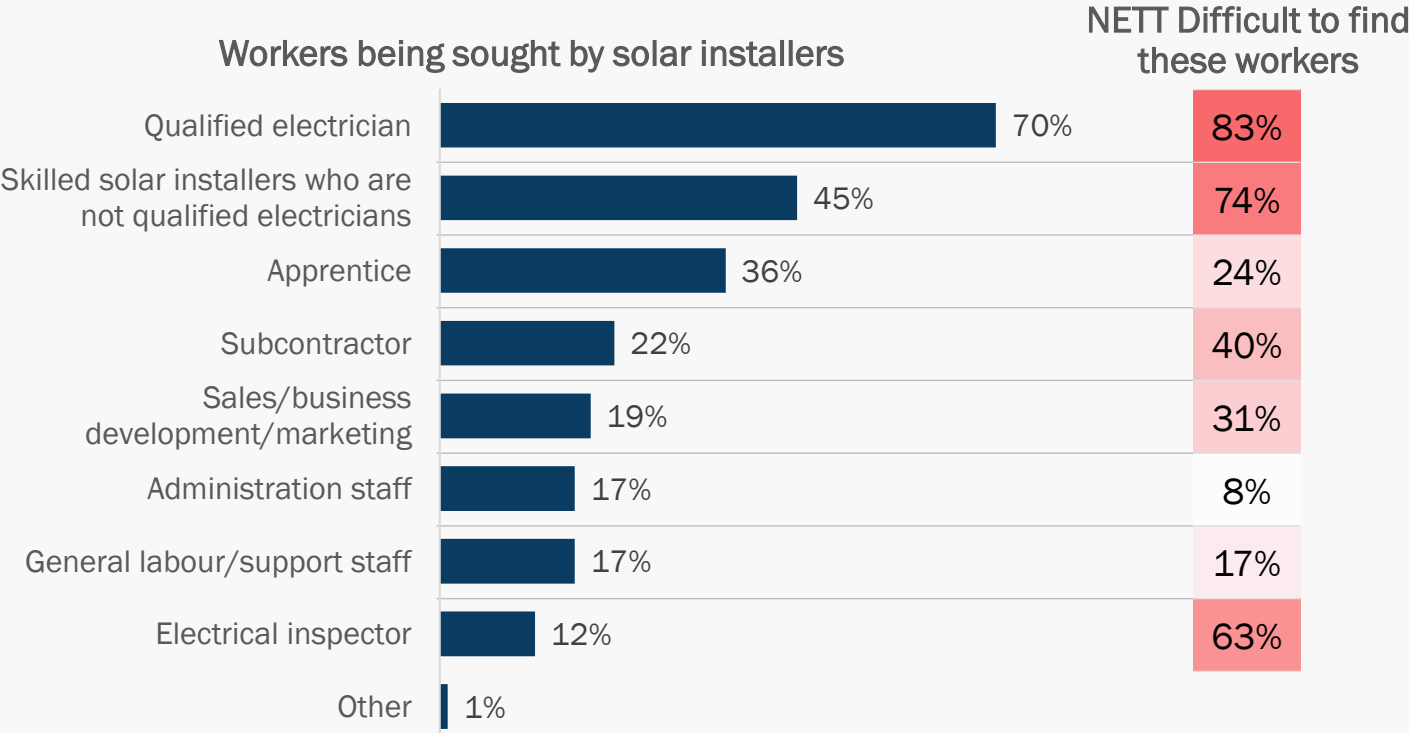
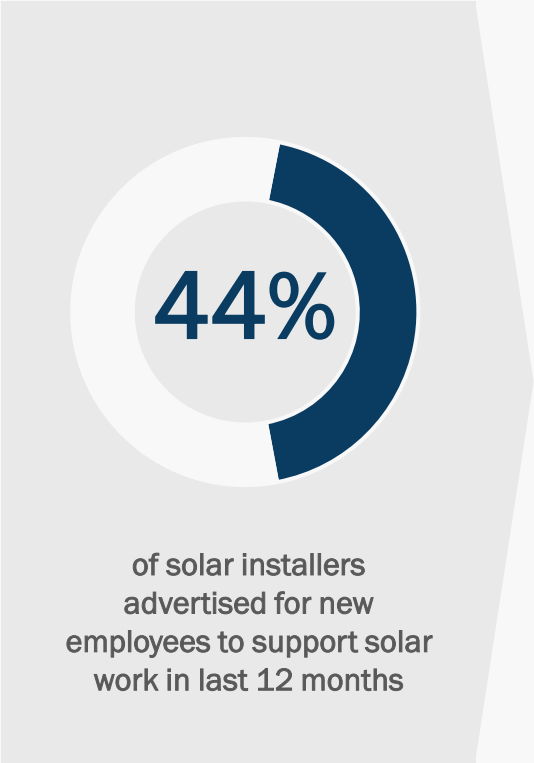
Increasing electricity prices are a major driver. Customers are also more aware of energy independence and want to reduce their power bills long term. There is growing interest in sustainability, and newer solar and battery systems are now more affordable and practical, which is increasing demand.
(Solar installer, Waikato)

”

Source: Q1c In your experience, what are the reasons for the increase in demand? (coded)
Base: Solar installers who think the demand has increased in the past 12 months (N=133)

Over the past 12 months, almost half of solar installers were actively looking for new employees to support their solar work.

Skilled solar installers and qualified electricians are the most difficult to find. 70% of businesses were looking for qualified electricians with 4 in 5 finding it hard. And nearly half were looking for skilled solar installers and 3 in 4 found it difficult.



Source: Q3a Over the past 12 months has your business advertised for new employees to support your solar work?
Base: Solar installers (N=156)

Source: Q3b Were you seeking...?
Base: Solar installer who advertised for new employees in past 12 months (N=69)

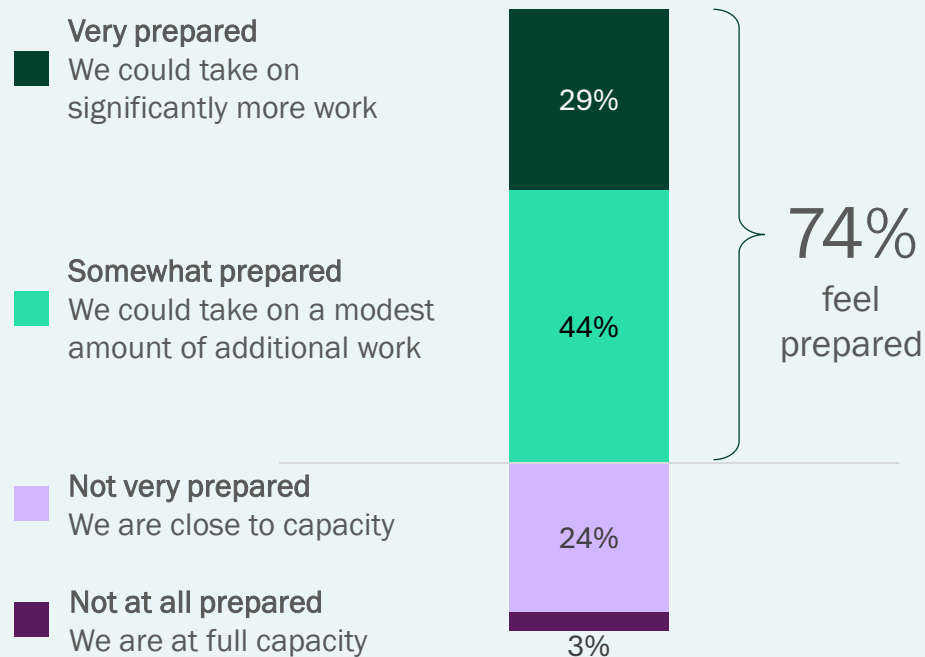
Source: Q3c How easy or difficult has it been for your business to find the following new employees to support your solar work?
Base: Solar installers who advertised for new employees in past 12 months (N=69)

3. Latent market capacity

One in four solar installers are not prepared for demand to double in the next 12 months, with the availability of skilled staff being the largest challenge.

Other anticipated challenges are training staff, and supply chain constraints.

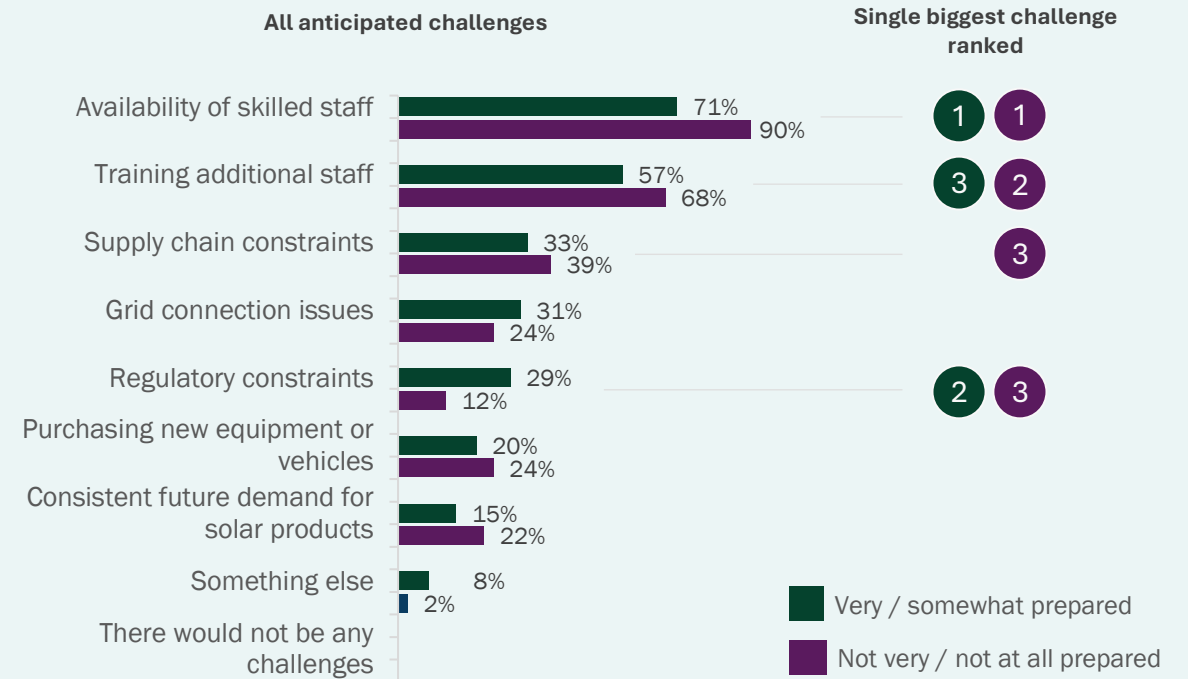
Ability to meet demand if it were to double in the next 12 months



Source: Q1h If demand for solar were to double over the next 12 months, how prepared would your business be to take on increased demand?

Base: Solar installers (N=156)

Challenges for taking on more solar work



Source: Q1i If demand for solar were to double, which of the following would present a challenge to taking on more solar work?

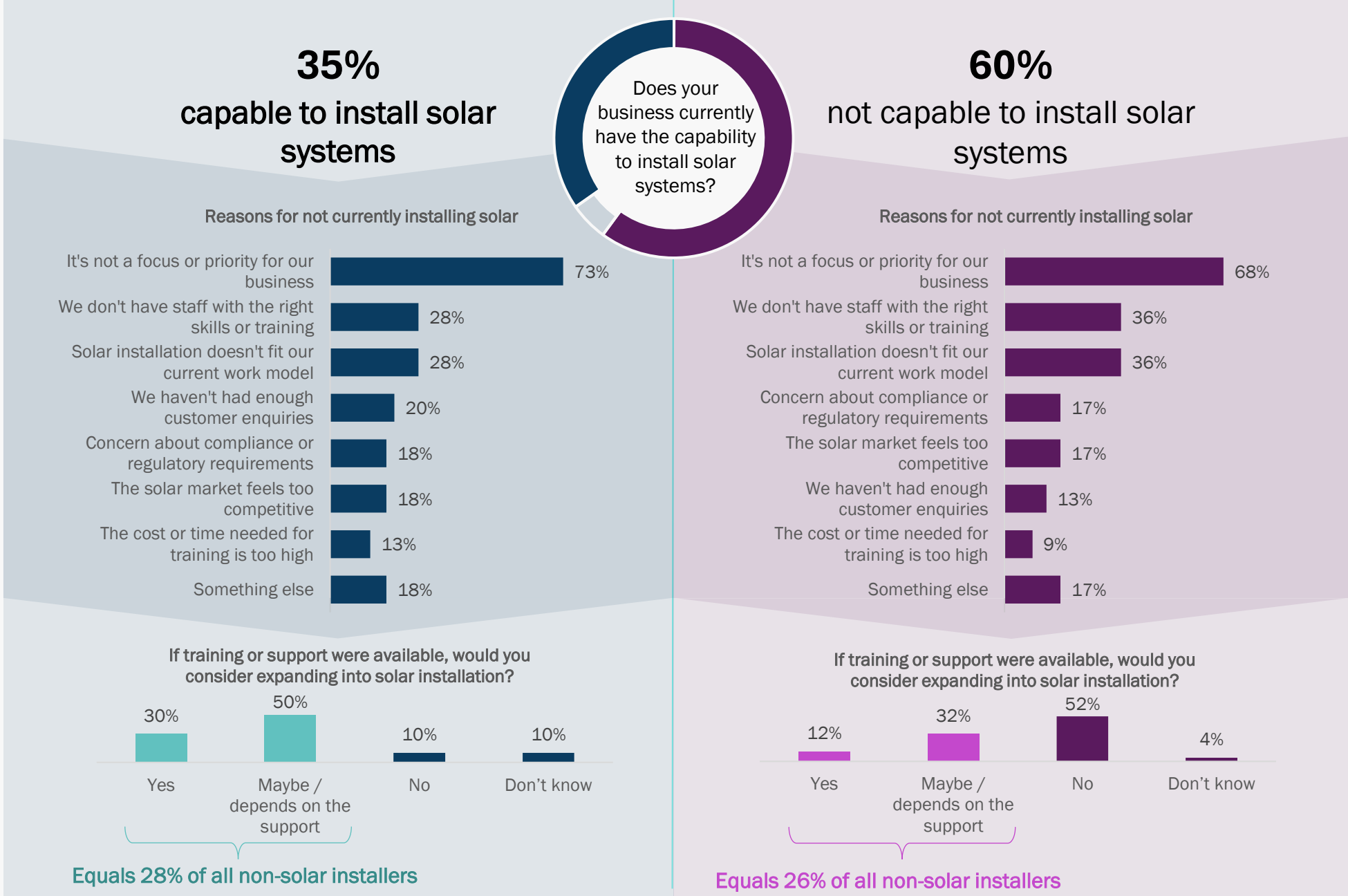
Q1j And which would be the biggest challenge for your business?

Base: Solar installers (N=156)

To understand latent capacity in the market, we included a small set of questions for electricians not currently installing solar, allowing us to assess their capability and likelihood of entering the market.

A meaningful pool of ‘near-entry’ electricians exists, with just over a third (35%) of non-installers saying they have capability.

These ‘near-entry’ businesses show clear signs of readiness: they are more likely to undertake electrical planning and fit-outs for new builds (78% vs 45%) and to employ flexible workforces such as contractors or temps (48% vs 25%).



Source: NS1 You've indicated that you don't currently install solar. Does your business currently have the capability to install solar systems?
NS2 What are the main reasons your business does not currently install solar?
NS3 If training or support were available, would you consider expanding into solar?
Base: Non-solar installers (N=115), those currently capable to install solar (N=40), those not capable (N=69)

Solar equipment suppliers:

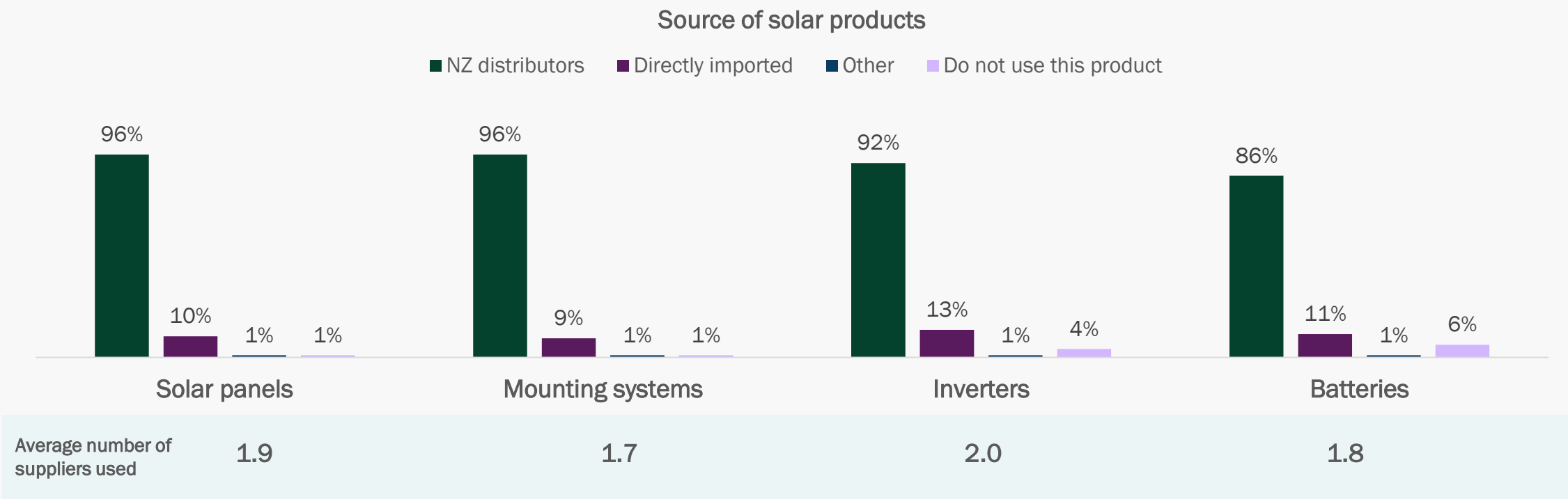
- Seven out of the ten solar equipment suppliers who completed the survey believe they're 'very prepared' and could supply significantly more solar equipment to meet demand if it doubled in the next 12 months.
- Two suppliers of solar equipment feel 'somewhat prepared' and could supply a modest amount of additional solar equipment.
- Only one supplier didn't feel prepared, with the business operating at close to capacity.
- None of the responding suppliers sees any difficulties with importing solar equipment into New Zealand.

Source: SE1 Overall, how easy or difficult is it for your business to import solar equipment into New Zealand?
SE2 If demand for solar were to double over the next 12 months, how prepared would your business be to take on increased demand?
Base: Suppliers of solar equipment (N=10)

4. Supply sourcing and supplier loyalty

Nearly all solar equipment is sourced from New Zealand distributors, especially solar panels and mounting systems.

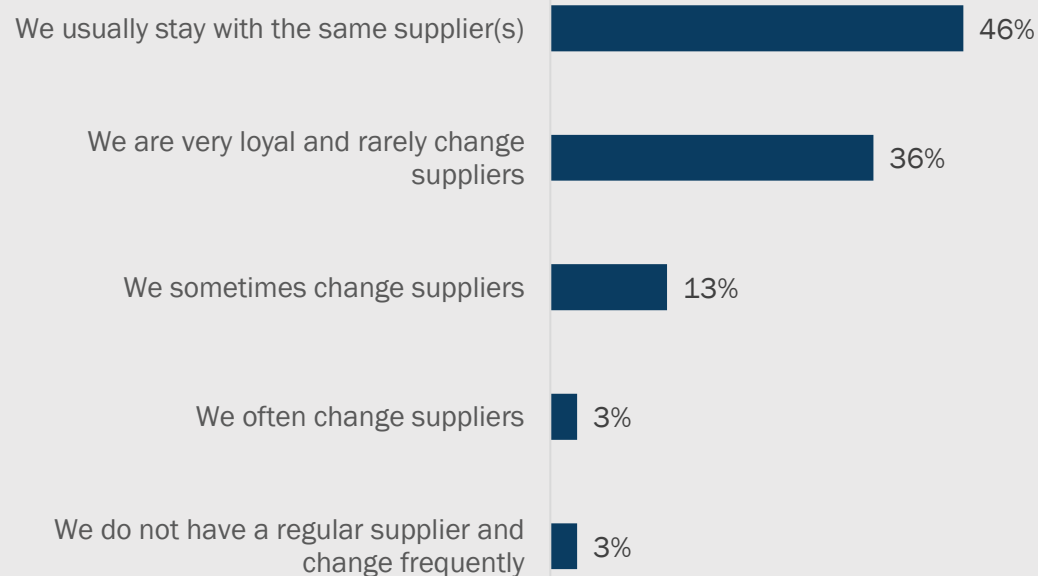
Around one in ten installers directly imports products, and uses an average of just below two suppliers.



Source: Q2i From where does your business source the following products?
Q2j And over the past 12 months, how many different suppliers did your business use for...?
Base: Solar installers (N=156)

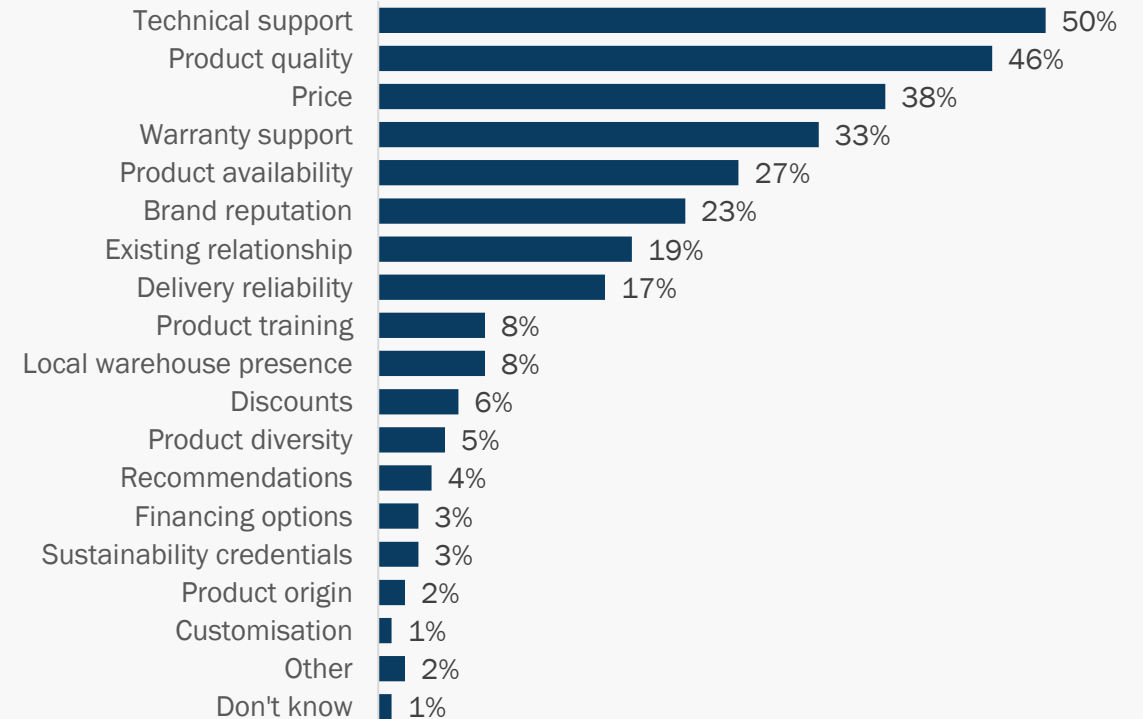
Technical support, quality of product, and price are the top three considerations for installers considering new suppliers – however most rarely see a need to change.

Perspective on switching suppliers



Source: Q2k Which of the following best describes your business when it comes to changing suppliers for solar products?
Base: Solar installers (N=156)

Considerations when choosing a new supplier

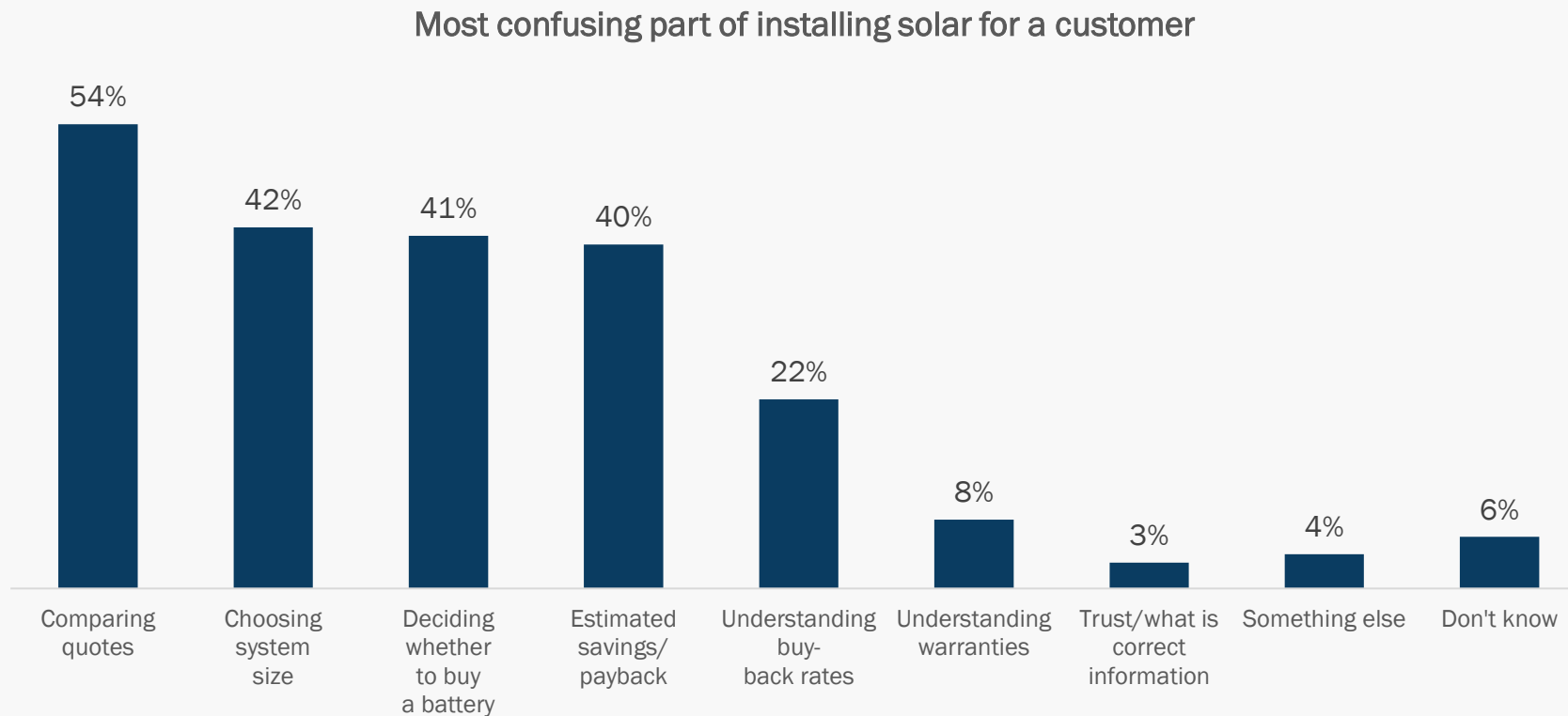


Source: Q2l What would be your three most important considerations when selecting a new supplier?
Base: Solar installers (N=156)

5. Information practices & support needs

Installers believe comparing quotes is the most confusing part of a customer's decisions to install solar.

Other confusing parts are choosing the system size, battery, and estimating ROI through savings.



Source: Q1k When thinking about installing solar, which parts of the decision process do your customers find most confusing? (Coded)
Base: Solar installers (N=156)

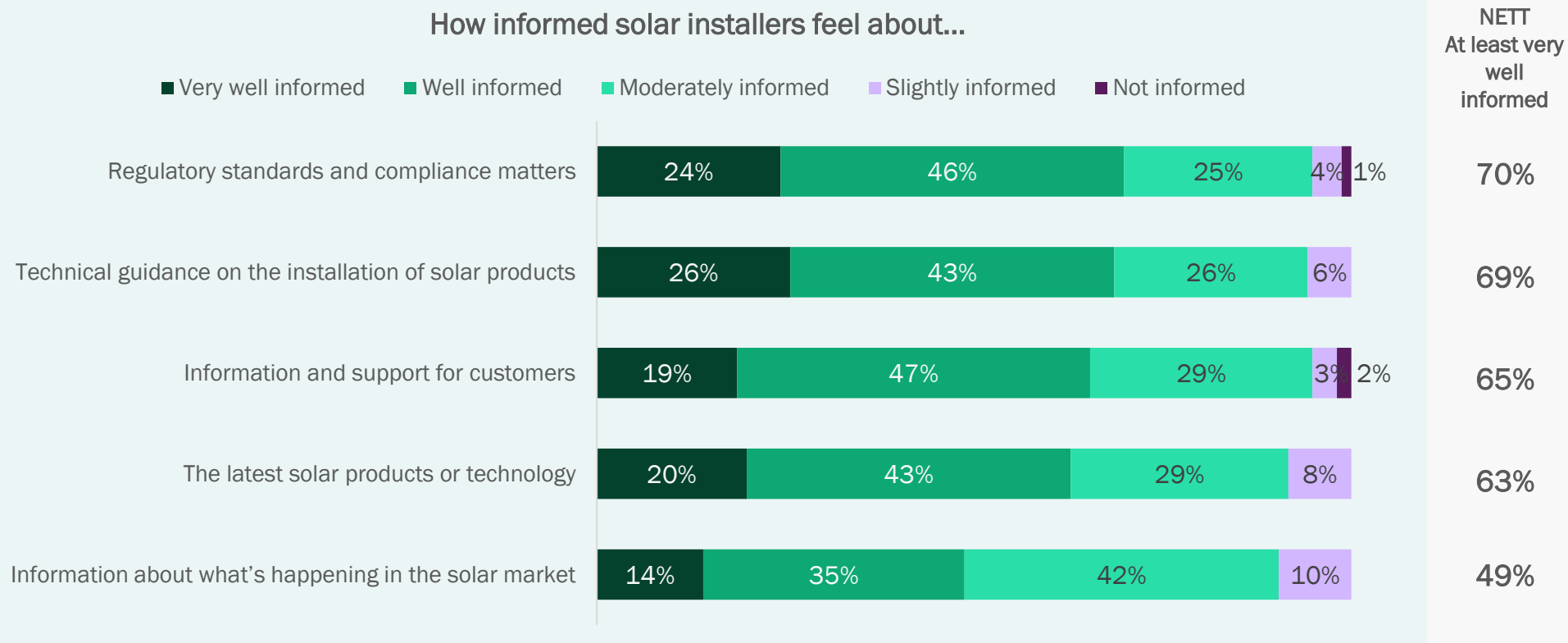
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For someone with no knowledge who starts to research solar, it's overwhelming with what's available and which option would be the best one for them. It's a huge investment and clients sometimes don't commit, because they are scared they'll choose wrong.
(Solar hot water installer, business operates nationwide)

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This biggest information gaps for installers themselves are on the latest solar products and technology, and market insights.

They feel the most informed about regulatory standards and compliance, and technical installation guidance.

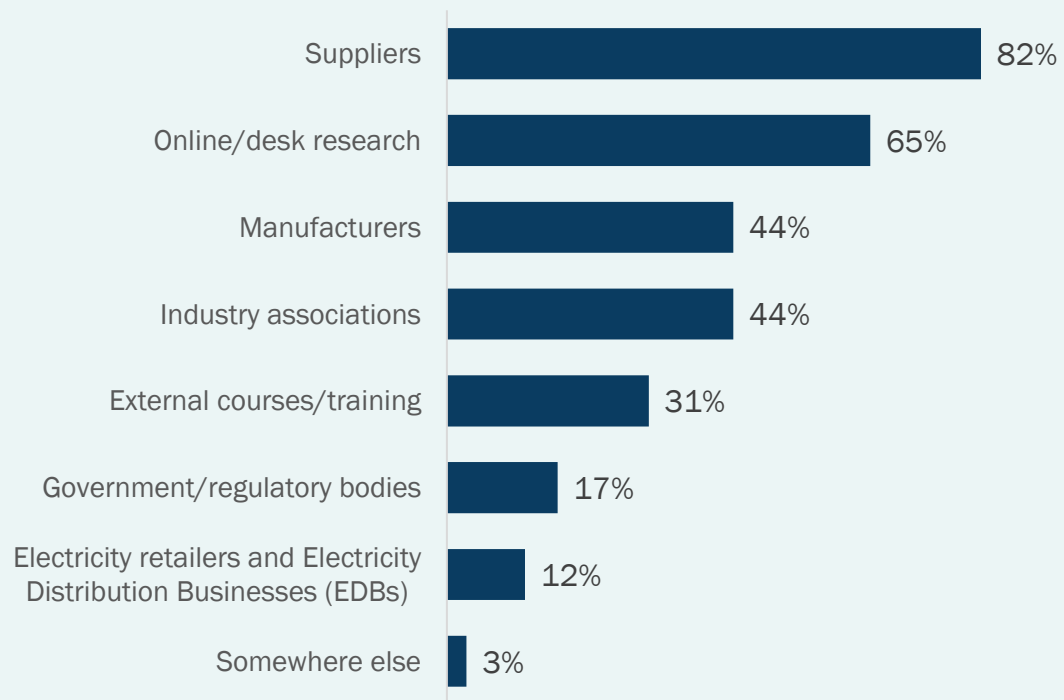


Source: Q5a Overall, how informed do you feel your business is about each of the following?
Base: Solar installers (N=156)

Despite clear information gaps, installers primarily rely on suppliers and their own research rather than dedicated, independent sources.

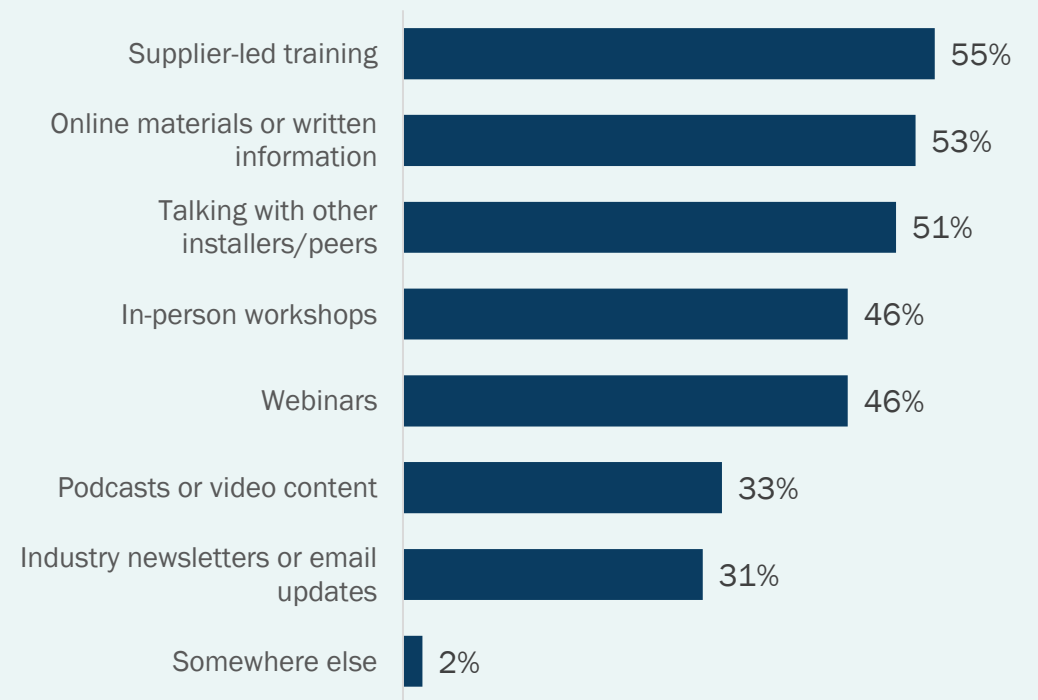
Their preference is supplier-led training, online materials and peer exchanges for learning about new information.

Current source of information about new solar products/technology



Source: Q5b Where do you get your information about new solar products or solar technology from?
Base: Solar installers (N=156)

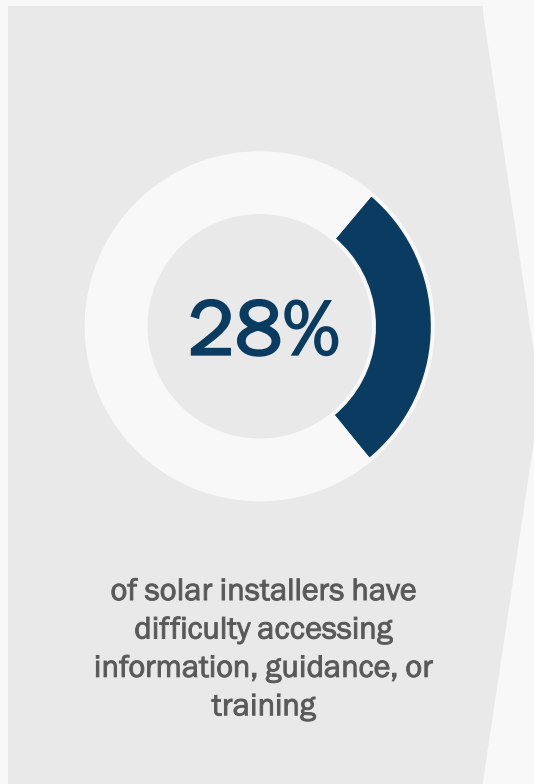
Preferred source of learning new information about solar



Source: Q5e What is your preferred way of learning new information about solar?
Base: Solar installers (N=156)

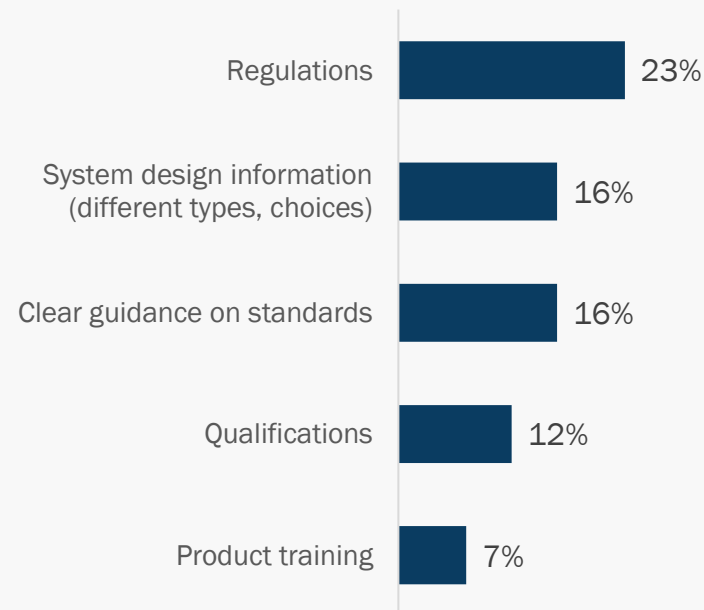
A quarter of solar installers say they have difficulty accessing some information, guidance on standards, or training materials.

Regulations, guidance on standards and system design information is most difficult for them to access.



Source: Q5c Is there any information, guidance, or training that you find difficult to access?
Base: Solar installers (N=156)

Top 5 mentions of information that is difficult to access



Source: Q5d What other information, guidance, or training do you find difficult to access? (Coded)
Base: Solar installers that has difficulty accessing information, guidance, or training (N=43)
Note: Only answer categories with at least N=3 answer are shown. Interpret with caution due to small base size.

“

Access to clear installation instructions and system design information at the quoting stage. In many cases, detailed documentation is only available after equipment is supplied, which makes accurate quoting and planning more difficult.

(Solar installer, Waikato)

Lines company requirements for DG [Distributed Generation] in different regions.

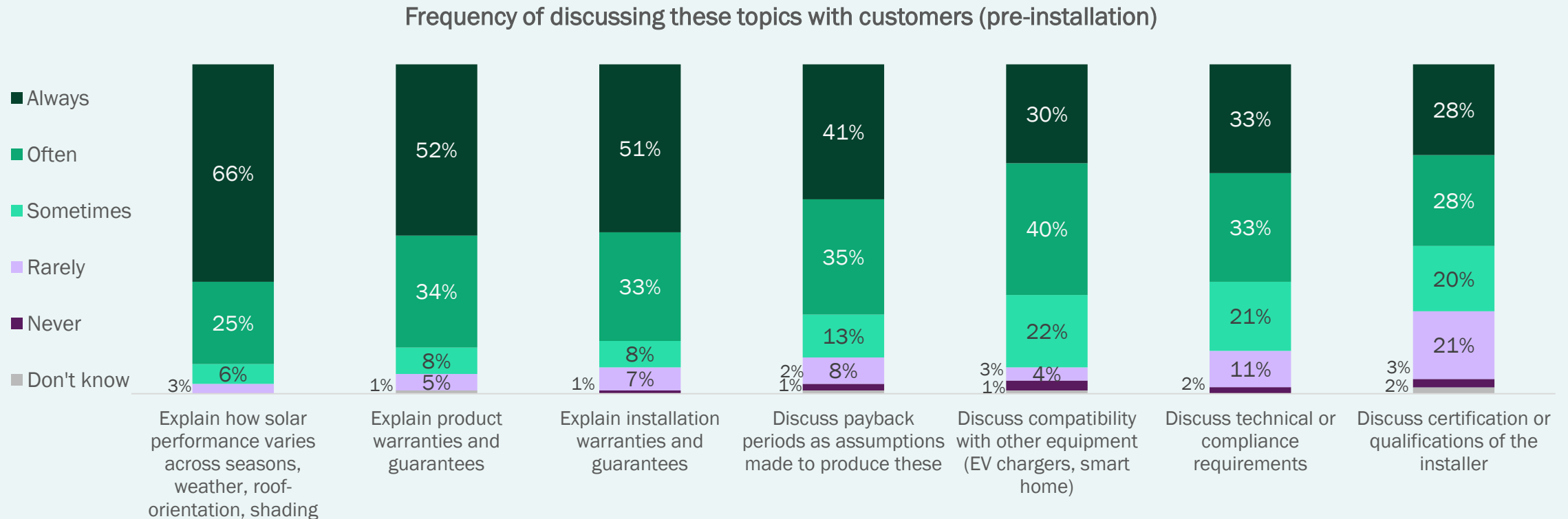
(Solar installer, business operates nationwide)

Solar companies can't access the NZ standards without having an electrical licenses – this is not helpful for solar company owners.

(Solar installer, business operates nationwide)

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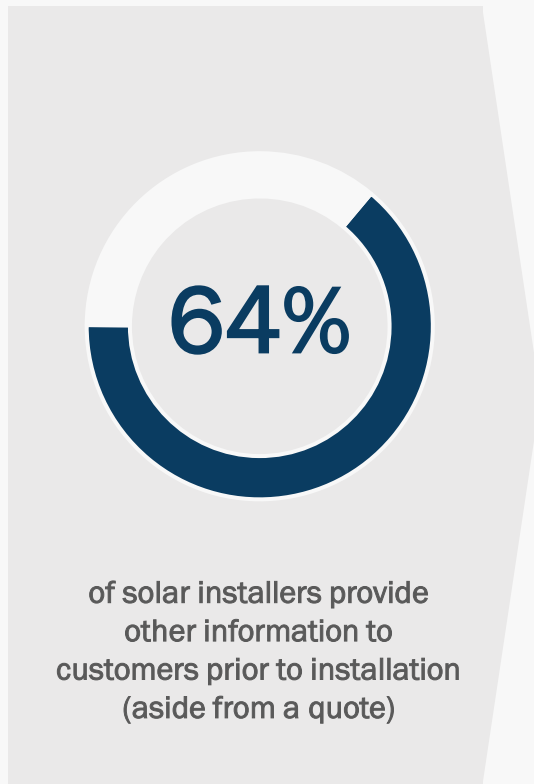
Most solar installers say that pre-installation, they often or always explain how solar performance can vary and go over warranties and guarantees. They're least likely to raise their qualifications, compliance requirements, and compatibility with other equipment.



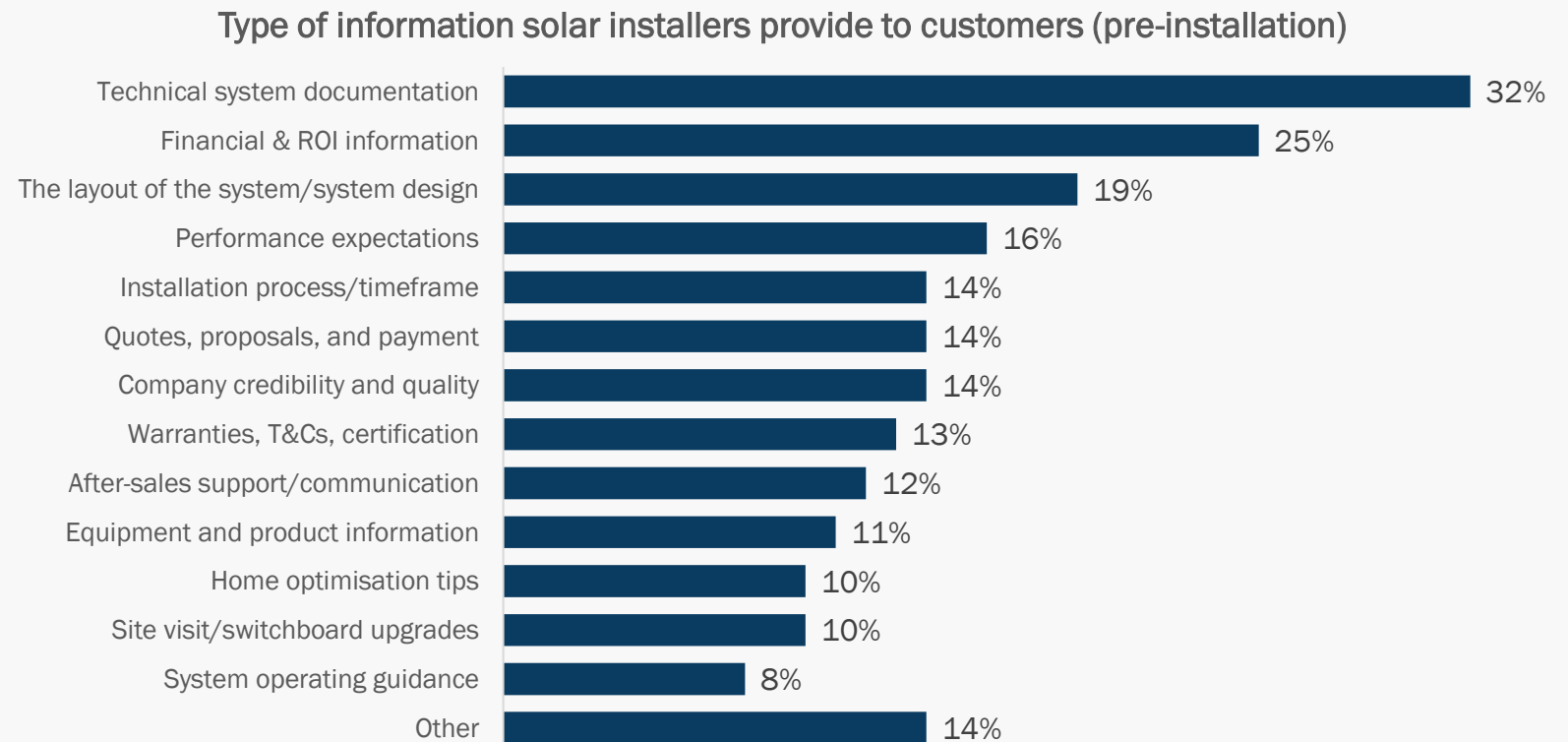
Source: Q5f When talking with customers about a possible solar installation (i.e., pre-sale), how often do you...
Base: Solar installers (N=156)

Two thirds of solar installers also provide other information prior to installation, most notably technical system documentation, and ROI information.

Additional information provided includes system design, performance expectations, and timeframes.



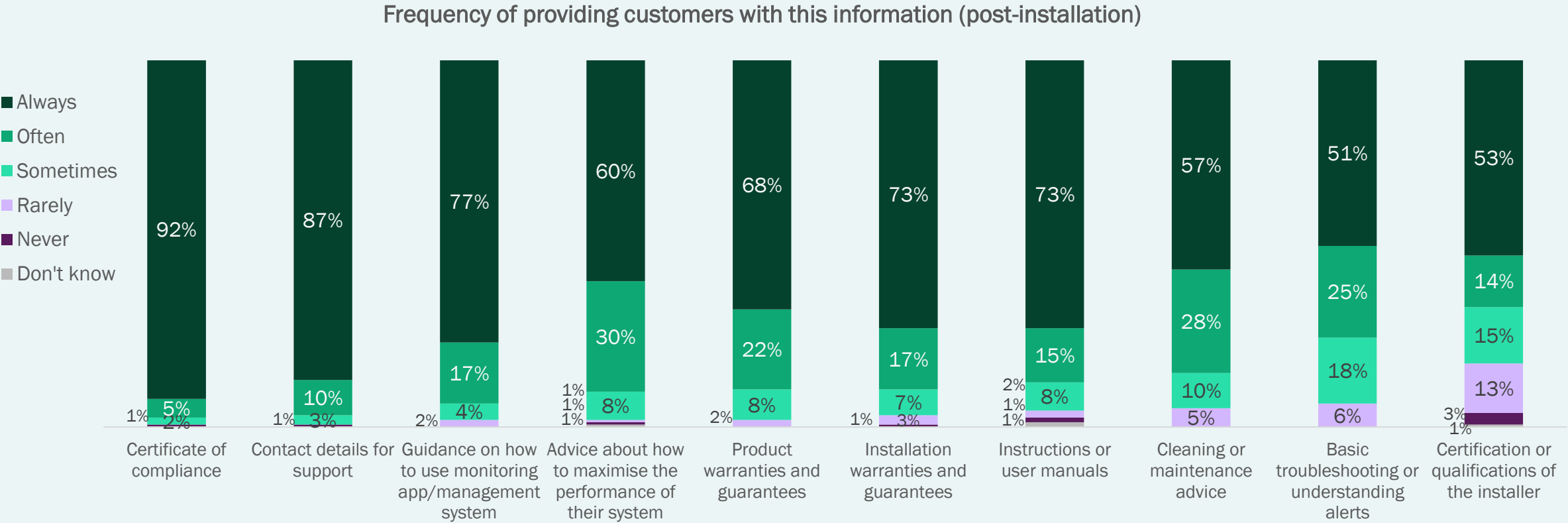
Source: Q5g Is there any other information you usually provide customers prior to installation, aside from a quote?
Base: Solar installers (N=156)



Source: Q5h What other information do you usually provide customers prior to installation? (Coded)
Base: Solar installers that provides information to customers prior to installation (N=100)
Note: Interpret with caution due to small base size.

Following installation, virtually all solar installers provide a certificate of compliance, contact details for future support, guidance on monitoring, advice on maximising performance, and warranties and guarantees.

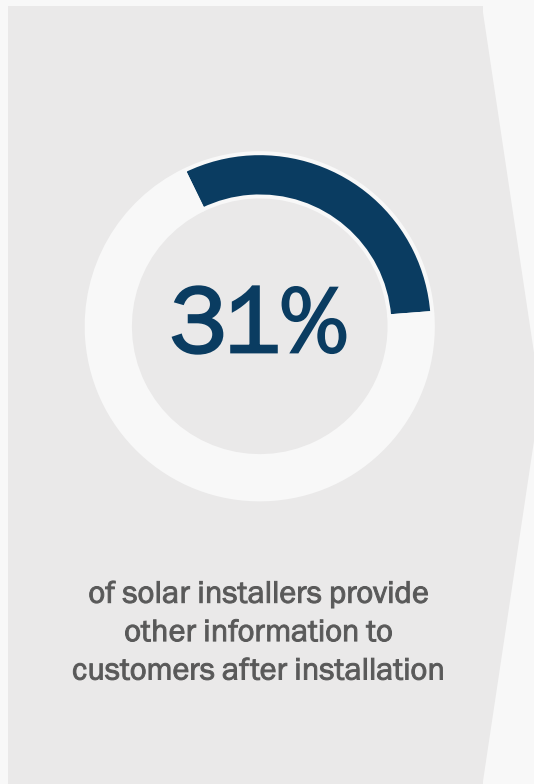
Basic troubleshooting and maintenance advice is also typically provided, though slightly less consistently. As with pre-installation, installers are least likely to provide details on their certifications.



Source: Q5i After installation, how often do you provide customers with...
Base: Solar installers (N=156)

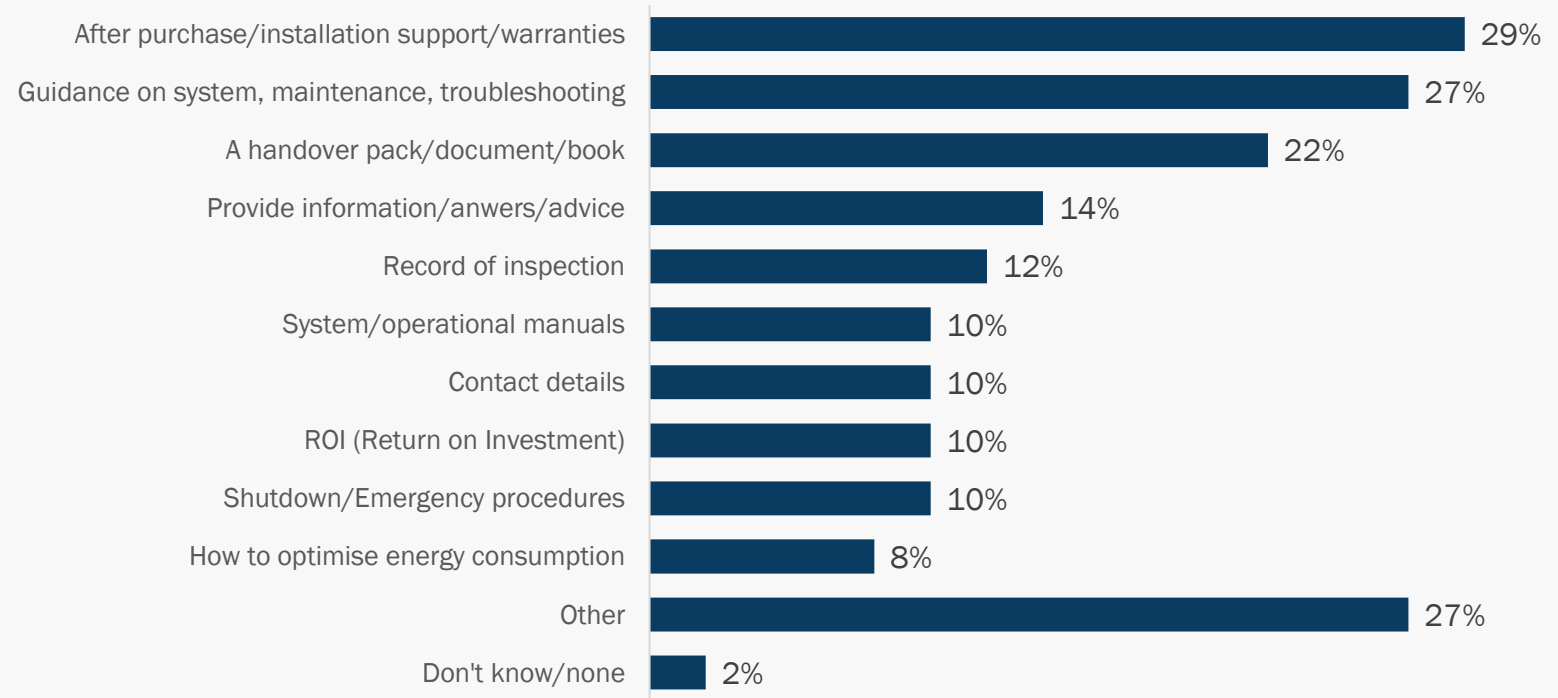
One in three installers provide other information after installation, such as after-installation support, system maintenance guidance, and a handover pack.

Other information provided includes record of inspection / compliance, and operating manuals.



Source: Q5j Is there any other information you usually provide customers after installation?
Base: Solar installers (N=156)

Type of information solar installers provide to customers (post-installation)



Source: Q5k What other information do you usually provide customers after installation? (Coded)
Base: Solar installers that provides information to customers after installation (N=49).
Note: Interpret with caution due to small base size.

Solar installers want to provide customers with more detailed and long-term information about their solar systems, both pre- and post-installation

17% of solar installers wish to provide additional information pre-installation, especially around detailed and accurate information about their systems.

Slightly less wish to provide more information post-installation (14%), such as cheat sheets on maintenance, how to increase solar efficiency, and how to change retailers.

17%
Yes – additional
pre-installation
information



14%
Yes – additional
post-installation
information

“

Accurate information regarding metering time frames, and accurate guidance on supply rates from associated retailers (Fixed Pricing).

What options there are for expansion of the system.

Get at least two quotes, and a home visit to talk over the options and the best design that will suit their needs.

More detailed and standardised system design information and installation guidance at the pre-installation stage would improve accuracy in quoting and reduce rework during installation.

”

“

Easy cheat sheets on maintenance and troubleshooting.

How to get the best out of the panels.

How to change retailer and get an import/export meter. The difficulty is due to the customer needing to contact a retailer directly.

Basic fact sheets about cleaning, maintenance, etc.

The future of solar.

”

6. Industry memberships and accreditation

Four in five solar businesses we surveyed say they're a member of an industry association, most commonly SEANZ.*



Source: Q4a Is your business a member of an industry association?
Base: Solar installers (N=156)
Note: *Due to the nature of our sampling approach, the memberships distribution is not national representative. We used different sources: a list of solar installers provided by EECA, publicly available databases and the Martins database of electricians with email addresses.
**(Master Plumbers NZ N=3; New Zealand Electrical Inspectors Association N=5; New Zealand Trade Group N=3).

The main reasons for being a member in an industry association are support from the industry and the accessibility of loans.

Reasons for membership in industry association



Source: Q4b What are your main reasons for membership in an industry association? (coded)
Base: Solar installers that currently are members of an industry association (N=128)

Reasons for not being a member

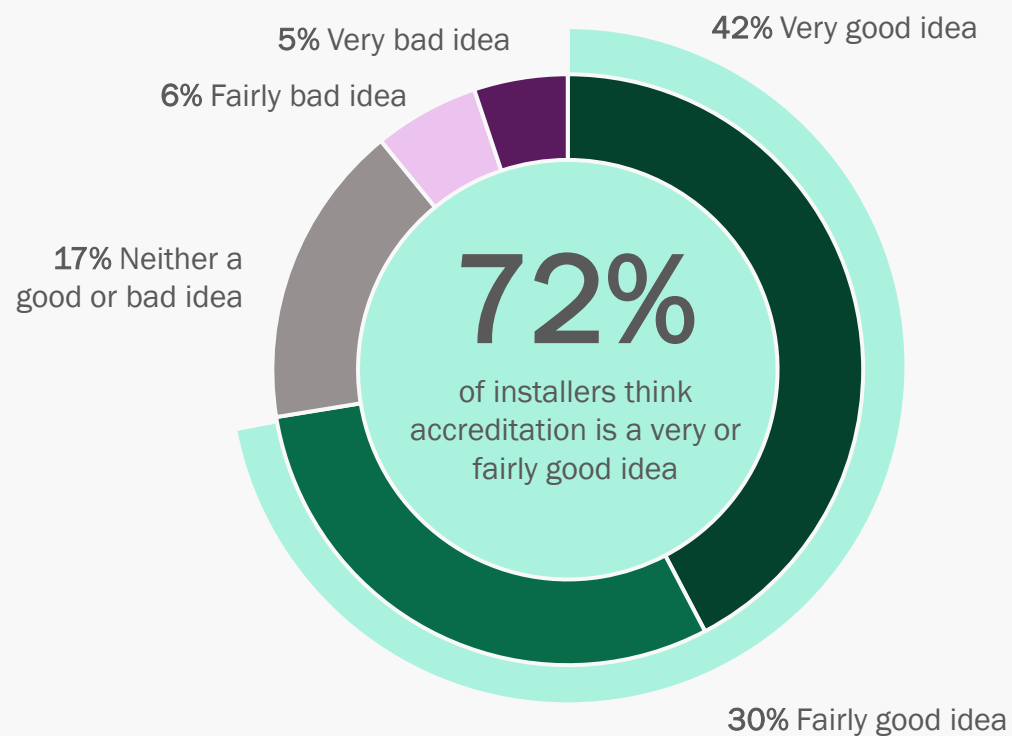
“ Volumes do not warrant that, no time. Expensive.
I do not see the benefit.
Does not provide enough value for investment.
No support for off grid specialists.
Costs for little support.
Small Company. ”

Source: Q4c You said you are not a member of an industry association. Why is that?
Base: Solar installers that currently not members of an industry association (N=28)

Most solar installers consider accreditation a good idea.

Accreditation was described as

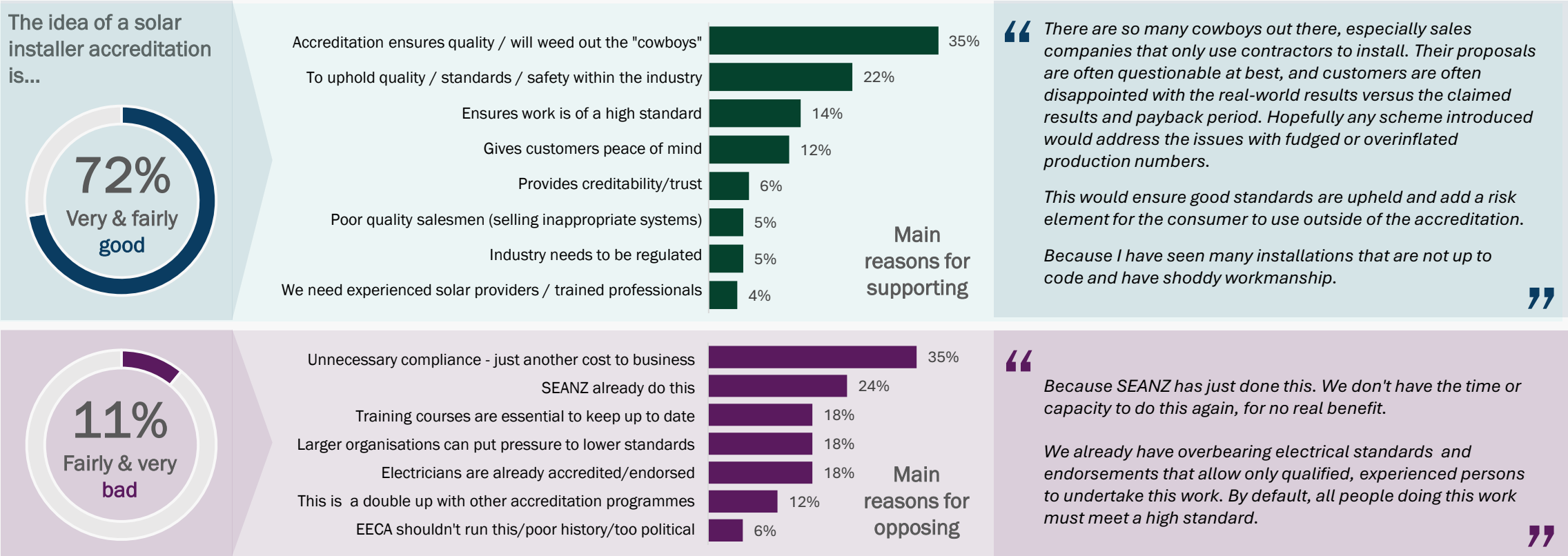
...an accreditation that confirms a solar installation company is appropriately qualified and meets recognised industry, safety, and quality standards for solar installation work.



Source: Q6a Do you see solar installer accreditation as a good or a bad idea?
Base: Solar installers (N=156)

Reasons for supporting accreditation are that it would support quality, safety and consistency across the industry.

Those who don't see the benefit mainly mention extra costs and doubling up with already existing programs.

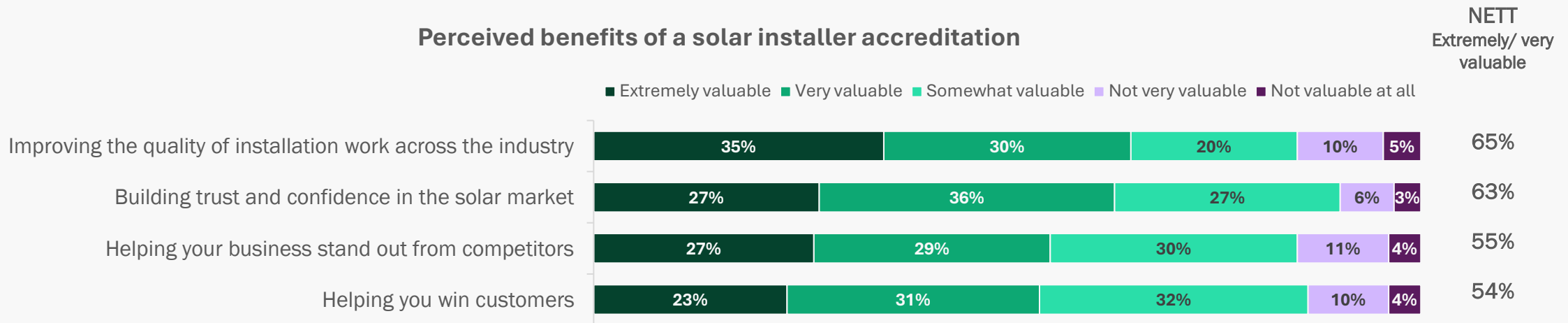


Source: Q6a The next questions ask about the idea of EECA (Energy Efficiency and Conservation Authority) potentially introducing an official solar installer accreditation. This would be an accreditation that confirms a solar installation company is appropriately qualified and meets recognised industry, safety, and quality standards for solar installation work. Do you see solar installer accreditation as a good or a bad idea?
Q6b For what reasons do you think this is a [INSERT FROM Q6a]?
Base: Solar installers (N=156)

Improving overall industry quality and building trust are all seen as the top benefits of an accreditation.

In addition, some see an accreditation as an enabler to access funding or undertake subsidised projects.

Perceived benefits of a solar installer accreditation



“ The big benefits would be for customers and the industry, rather than our business.
Ongoing support on best practices and regulations understanding.
Maybe get a chance to get solar jobs that are govt. subsidised.
Access to potential funding or green energy loans.

Greater consistency in system design and installation practices across the industry, improved access to structured training and upskilling, and clearer guidance for both installers and customers. It could also help reduce poor-quality installations and support long-term industry sustainability.

”

Source: Q6d How valuable do you think a solar installer accreditation could be for each of the following?
Q6e Are there any other benefits a solar accreditation from EECA might offer your business?
Base: Solar installers (N=156)
Note: NETT figures may vary slightly due to rounding.

Those in favour of an accreditation still have some concerns around costs, the balance between easy access and value, time needed and extra paperwork.

Top 10 concerns regarding a solar installer accreditation*



“

Additional expenses and paperwork to get this accreditation, especially when it could double up on existing accreditations, i.e. Sitewise etc.

The application process and time taken to do this, also if there was any subscription cost for this.

It doesn't need to be too intensive. Any good electrician will pick up solar installation very quickly. They just need some guidance on the different requirements for installing and testing.

Larger companies will still hire unskilled cheap labour.

SEANZ Solar Sure doesn't give accreditation to the installer, a company gets it, there's no guarantee that the installer is qualified?.

It will be granted too easily by EECA with the bar set too low.

There should only be one accreditation scheme. SEANZ already has Solassure and this should be adopted by EECA.

Too many memberships required for a small business, costs.

”

Source: Q6c Even though you think accreditation is a good idea, what concerns would you have? (coded and quotes)

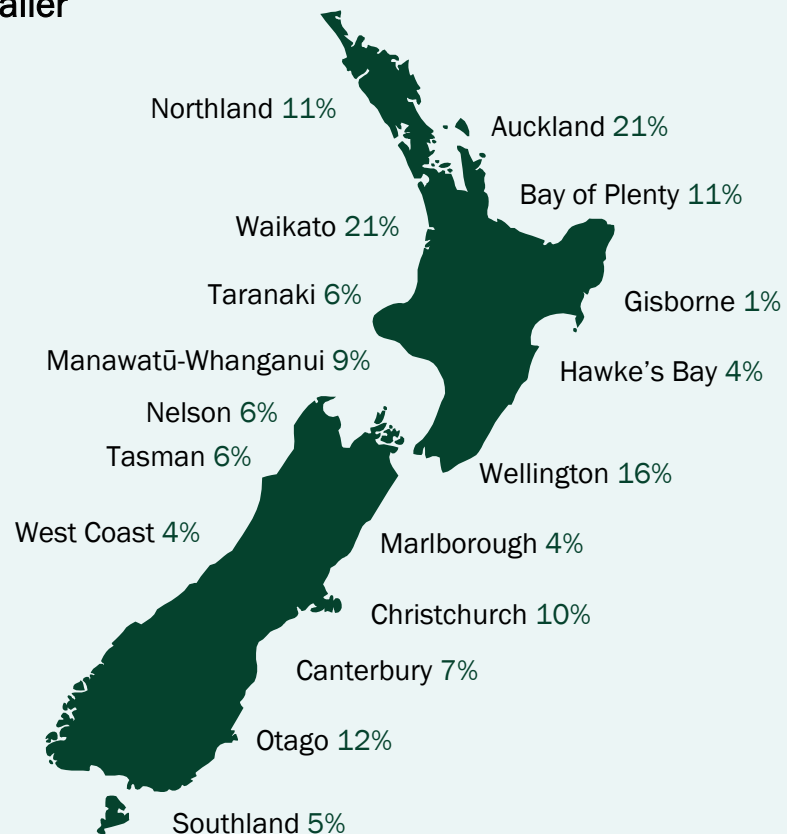
Base: Solar installers that think an accreditation is a very or fairly good idea (N=113)

* Only categories with minimum N=5 answers are displayed.

Appendix

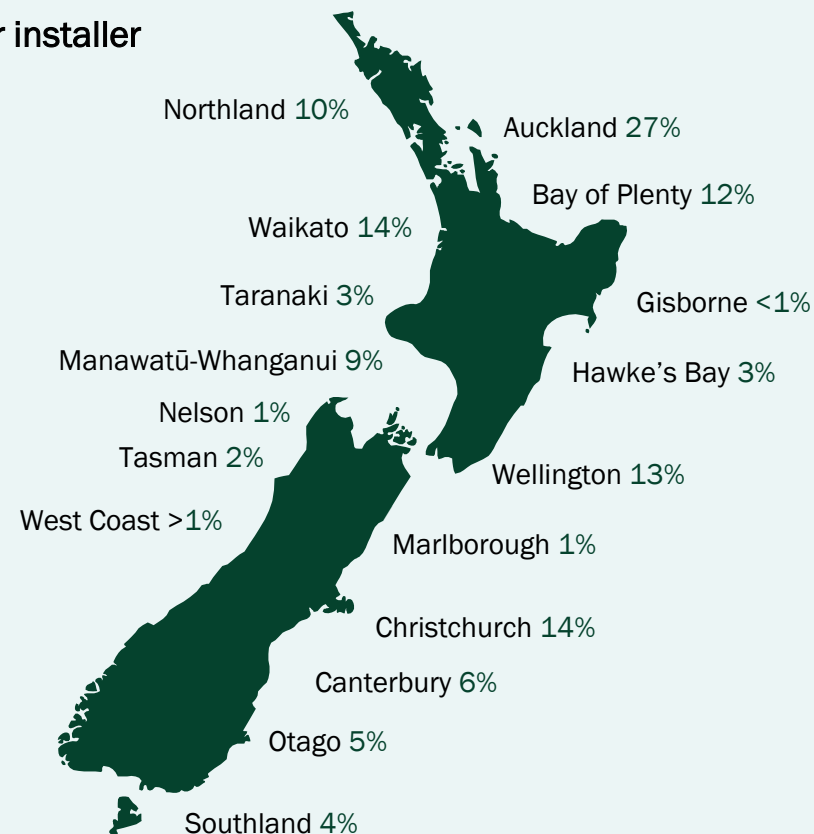
Regional operations

Solar installer



Source: S1 In which New Zealand regions does your business operate?
Base: Solar installers (N=156)

Non-solar installer



Source: S1 In which New Zealand regions does your business operate?
Base: Non-solar installers (N=115)

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