Residential Solar in New Zealand: Understanding the Customer Journey

June 2025

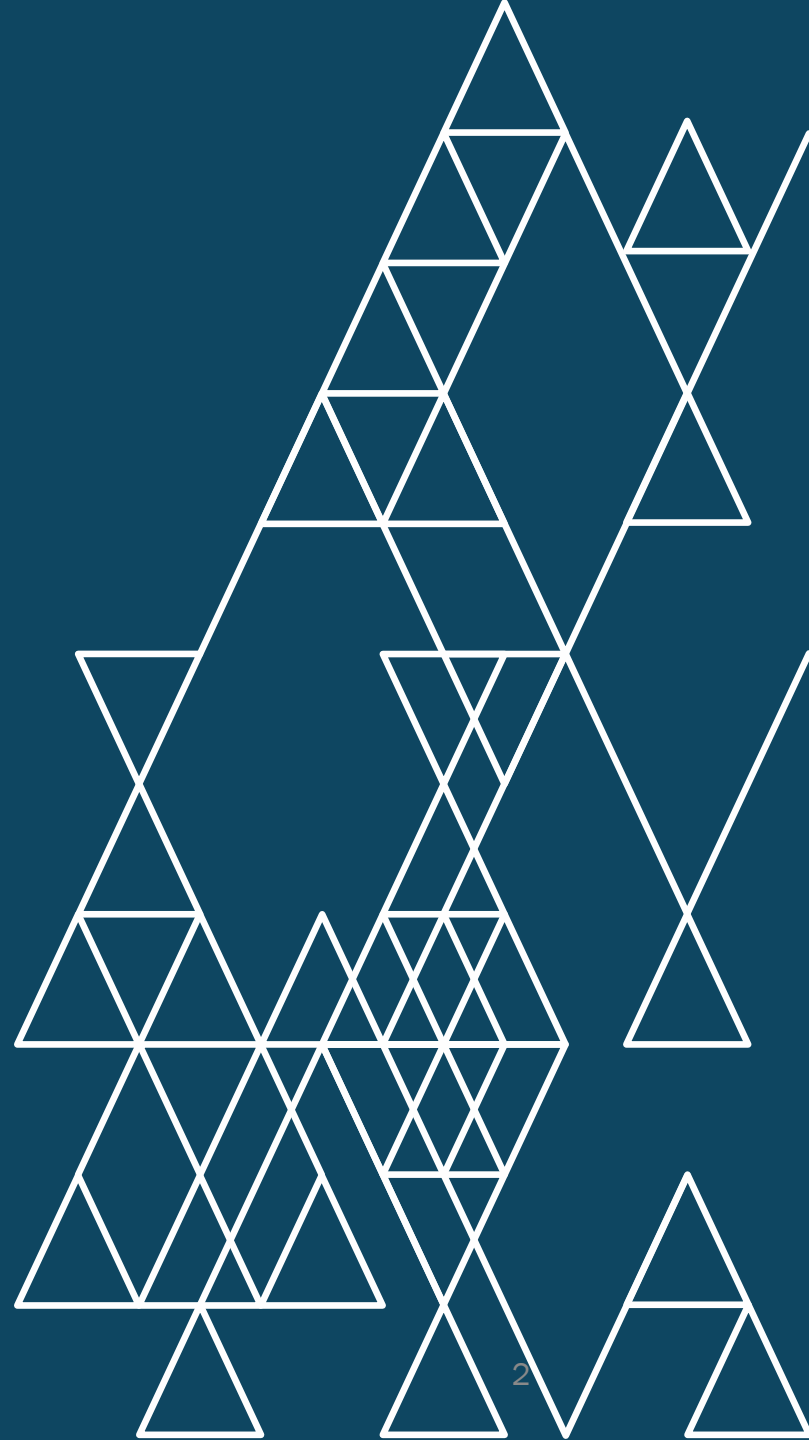
Background

Residential solar systems and battery storage are expected to play an increasingly important role in New Zealand's energy future, aligning with EECA's renewables energy objective.

As of the end of 2024, just over 63,000 residential solar systems had been installed—representing 2–3% of New Zealand homes*. This suggests the market is still in the early adoption phase.

To understand more about the consumer perspective and experiences related to residential solar, EECA engaged TRA (The Research Agency) to conduct consumer market research with people who have taken an active interest in a solar system for their home but not progressed to purchase, and those who have progressed through purchase and install. In this report, the term 'consumers' refers collectively to these audiences.

The focus of the research was on how households investigate, finance, and install solar, and their perceptions of benefits, barriers, and information gaps.



*Source: BRANZ, https://www.level.org.nz/energy/renewable-electricity-generation/

Research objectives

Gather consumer insights about the residential solar market in New Zealand among considerers and purchasers.

The insight objectives:

1. Explore awareness, perceptions, and considerations of factors, technologies, products, features, etc. relating to solar
   - Understand consumers' knowledge about solar, the options available, the installation process
   - Unpack the experience: investigating, purchasing, and having residential solar installed
   - Understand the resources, tools, finance, and information sought and used
   - Understand the motivations and drivers to residential solar – uptake and reappraisal
   - Understand the barriers to residential solar – consideration and uptake
2. Identify opportunities to increase the uptake of residential solar and the role EECA can play to support consumers (from consideration through pathway to purchase and installation)
3. Establish a view of the customer journey, key milestones and cadence, moments that matter, tension points, needs, emotional journey, key influences, sources of information, opportunities to intercept

Qualitative methodology

To gain a detailed understanding of the consumer journey this research consulted those who have recently been all or part way through the experience.

Three audiences with different levels of experience were consulted to understand the factors that lead to someone completing the journey compared to those who decide not to proceed.

- **7x Investigators:** Investigated having solar installed in the past 12 months but decided not to proceed in the next 2 years.
- **8x Intenders:** Are actively considering/planning on having solar installed in the next 12 months, their finance is sorted and are ready to move to the next stage.
- **9x Purchasers:** Have had solar installed in the past 20 months. Within this audience we included those who have purchased outright, those who have taken up a Power Purchase Agreement (PPA), and some who have had battery storage installed. Three people within this group have installed with SolarZero.

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Those who have not seriously considered residential solar were not the focus of this research.

Approach

Stage 1:

Online discussion board - broad understanding of the journey.

A three-day online discussion board provided broad qualitative insights into the residential solar journey.

This included consumers' awareness and perceptions of solar energy and system providers, the stages they move through, key motivations and barriers to adoption, and their information needs throughout the process.

Stage 2:

1:1 In-depth online interviews – deepening understanding.

Following the discussion board, one-on-one online interviews were conducted with participants from three key audience groups.

These interviews explored the journey in more detail, including decision-making processes, trade-offs, and perceptions of brands, products, and installers. This stage also helped refine the consumer journey stages and identify potential opportunities for EECA to provide support.

Key findings

Residential solar is aspirational but challenging to navigate
Consumers widely view solar as a desirable long-term investment offering energy independence, financial savings, and environmental benefits. However, they often struggle with understanding how to make it work in their specific context. The journey is emotionally charged and information-intensive, often leading to decision fatigue or delayed action.

The customer journey is long but active
The path to adoption includes nine distinct stages, from pre-awareness through to advocacy. While the journey is largely linear, it is punctuated by pauses due to life events, financial readiness, or uncertainty. Timeframes vary significantly - some move forward quickly, while others revisit the decision over many years. However, pauses and delays don't necessarily mean lost customers - many are simply waiting for the right moment.

Research and learning are recurring across the journey - information gaps and overload are common
Consumers frequently report being overwhelmed by conflicting or overly technical information. Trust in sources is a major concern, not just in the messenger but whether information is current. Independent, neutral information is highly valued. However, there is a need for clearer, more accessible, and up-to-date content tailored to individual circumstances.

Financing is a key barrier
Upfront cost remains a major hurdle. Although awareness of green loans and Power Purchase Agreements (PPAs) is growing, many are confused by financing options or ineligible for advertised schemes. Intenders are often ready to proceed but need help accessing and understanding financing pathways.

Post-install adjustments are complex
The first 12 months of living with solar involves a steep learning curve. Many experience lower-than-expected savings initially, confusion about system performance, and frustration over energy billing and export rates. Behavioural changes, such as shifting electricity use to daylight hours, are common as consumers adapt.

Consumers become advocates
Despite early challenges, the majority of purchasers reflect positively on their decision and become strong advocates. Many wish they had acted sooner and actively encourage others to adopt solar.

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Summary of the customer journey

Stage	Key features
Stage 1: Pre-awareness	• Consumers passively or actively encounter solar through media, conversations, or industry trends, shaping early perceptions, influencing their levels of knowledge and understanding coming into the journey. • This baseline shapes how they respond to information during the discovery phase, determining how much more they need to learn and where corrections may be needed.
Stage 2: Initial interest	• A specific catalyst prompts consumers to start thinking about a solar system for their home. There is a shift in mindset from passive to active interest. • Taking action does not necessarily happen immediately. • Entry points to take the next step can be unclear (where to start, what to look up).
Stage 3: Exploration and early research	• Consumers enter a loop – researching to answer the question 'is this the right time for me? • Research tends to be broad and general. • This stage is crucial for bringing consumers to the right baseline of knowledge. It helps dispel common misconceptions about solar energy and clears up any outdated or incorrect perceptions they may still carry. • But it's overwhelming and sometimes generalised information can lead people astray or set the wrong expectations – especially around price and system requirements. • Most think there is a lot of info out there, but are not always sure what they can trust (credible voice and up to date).
Stage 4: Evaluation	• Consumers evaluate if and how they can make solar happen for them. • Structured decision making, evidence based, precise. • Making trade offs (mostly financial). • Adoption is easier when financing removes the need for lifestyle sacrifices. For some, 0-1% loans helped to overcome this barrier. • Reality check, especially around financing/ cost or solar system requirements. This can be confronting as expectations and reality are often misaligned.

Summary of the customer journey

Stage	Key features
Stage 5: Choosing the right supplier	• Consumers formally accept a supplier quote and engage the company. • Reassurance (or doubt) from interactions with suppliers significantly impacts confidence moving forward. • Quotes are relatively comparable, so supplier knowledge and customer service are key influences. • Marks a milestone - consumers feel they have made a significant step towards solar for their home.
Stage 6: Financial commitment and purchase	• Financing locked in, making payment, ordering of products. • It can be hard for some to secure financing or a lengthy process with loan applications. • Those ready to purchase get comfortable with the cost. But the final price is often misaligned with their early expectations. • As they wait for their products to arrive, there is lack of clarity around what comes next.
Stage 7: Installation and set-up	• Physical installation of their solar system occurs. • Logistic or technical hiccups and delays can frustrate. • Don't know what good looks like, what is normal (e.g. delays) – it's unchartered territory. • Seeking extra reassurance from their installer that the set up was successful. Poor communication from installers creates nervousness and confusion.
Stage 8: Adjustment and living with solar	• The reality of living with solar. The first 12 months are a steep learning curve with emotional highs and lows. • System performance and export rates often fall short of expectations. • On the other side (12 months on) many say they did not feel adequately informed about what to expect when solar became a reality – what a 'normal' experience looks like is not well understood. • Behaviours change to 'get the most' out of their system. • Many reappraise their electricity provider, their system and consider upgrades.
Stage 9: Reflection and advocacy	• Many solar adopters become strong advocates, wishing they had installed sooner and encouraging others to take the leap. • Early challenges — installation, financing, or billing — fade over time. In hindsight, most see these as minor compared to the long-term benefits. • Positive reinforcement about having made the decision to purchase and install.

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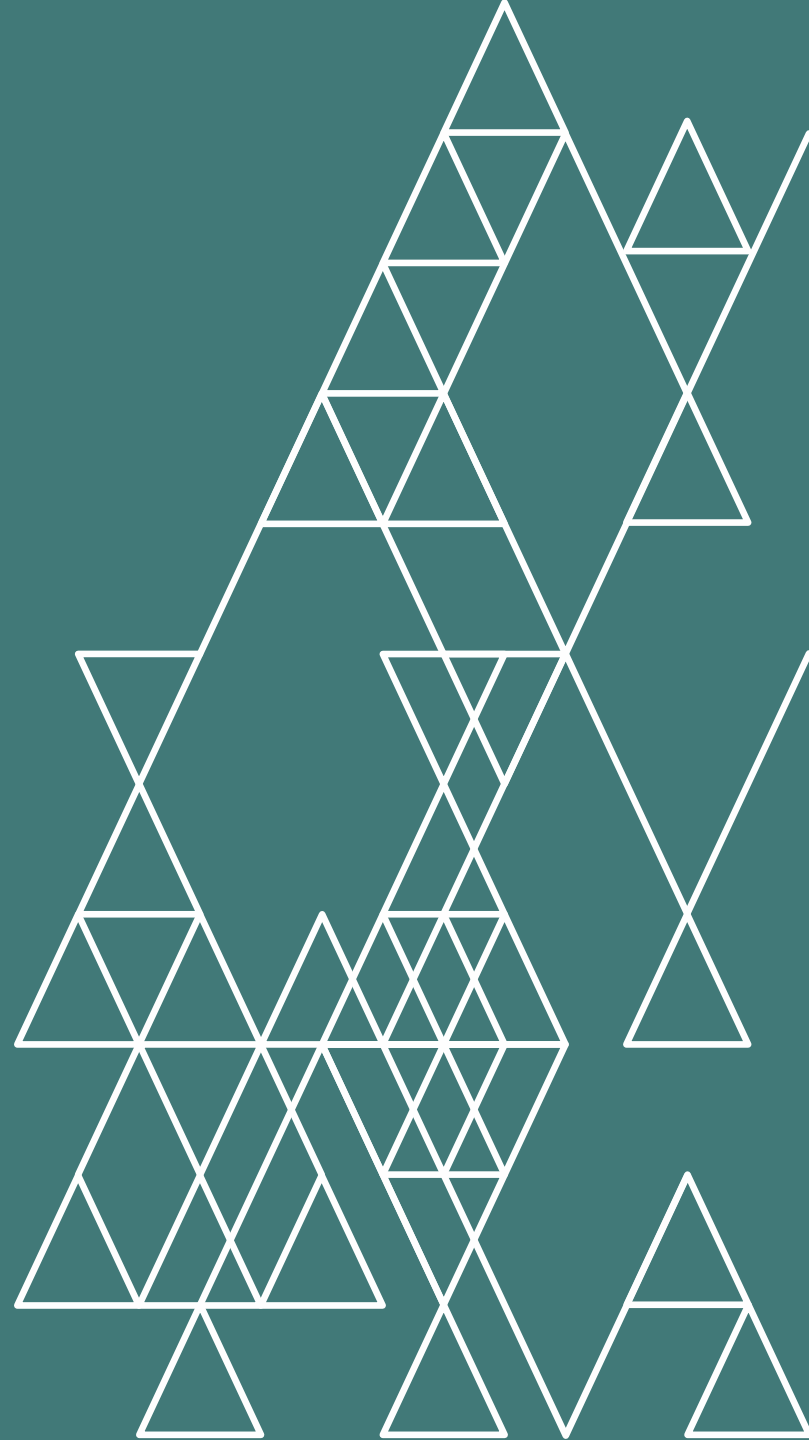
Context and consumer mindset



Solar is a valuable but significant investment; consumers want to get it right.

- Solar is seen as more than just a purchase – it's an investment, an asset.
- Because it is attached to the home, consumers say that solar feels 'permanent'.
- Most consumers liken solar to major home improvements (for example, a re-do of the kitchen, or a new verandah). They see the opportunity to benefit from it day-to-day and the potential it has to add value to their property in the future.
- They weigh long-term returns, lifestyle impact, financing, and property value.
- This high-stakes decision means a considered journey for most consumers.

"It's right up there in terms of expenses. I'm asking myself is it ultimately going to add value to my home?" –Purchaser of solar

"People have to be willing to make a decision today to benefit their future financial situation. It's like spending money now with the idea that you're going to benefit a little bit this year and more in 10 years."–Purchaser of solar

Although solar has been around for a while, it is still seen as new, evolving technology.

It can be overwhelming for many consumers to understand and keep up with information.

Whilst enthusiasts of solar, renewables, technology enjoy keeping up to date, for others this can be intimidating leading to doubts over whether their knowledge is up to date.

Reliance on those in the know and deferring to suppliers.

Suppliers who understand the technical details are highly valued. Most consumers expect them to know where the technology has come from and how current options compare, helping to bridge the knowledge gap for those who may not be up to date.

Many consumers anticipate there is always more to learn and a constant stream of better products being available.

Many see solar as a fast-evolving space, it's technical so there is lots to learn, making them hesitant to act. Some delay decisions, worried that better technology or financial incentives may come later. While this hesitation is softening compared to 5+ years ago, it still lingers in consumers' minds.

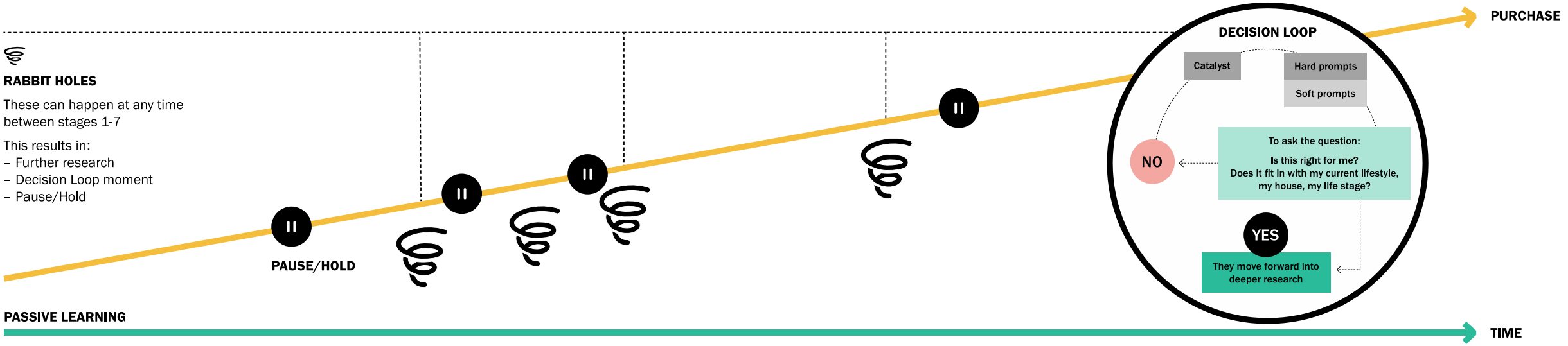
This can create inertia.

"As batteries get better there will be more demand and costs will come down significantly. The manufacturer making them will also get more efficient and cheaper. I waited but now I think the technology has got to a good enough point." – Purchaser of solar

The path to purchase journey is mostly linear but punctuated by pauses, emotions and moments of deep engagement.

Consumers go through the same stages and milestones in their journey. However, the duration of the overall journey and pace at which they move through stages varies. While some commit in as little as five years, some journeys stretch to over 20 years.

Why do consumer pause?: Life events, finances, or home projects (e.g., renovations, waiting for better tech) often delay action. But many who have installed solar look back and regret waiting, realising they could have started their payback earlier.



The emotions experienced throughout the process are a journey itself.

- Emotional highs and lows happen within most stages of the path to purchase journey. A universal experience across consumers.
- Key emotions include curiousity, intrigue, confusion, overwhelm, optimism, disappointment, pride and satisfaction.
- It's a big investment of money, time, and energy – which heightens every emotion.
- Emotions like overwhelm and nervousness can send some consumers down "rabbit holes". This can slow things down, but usually moves them forward or leads to a pause – not stepping back stages.
- Despite the rollercoaster of emotions, consumers who are living their life with solar reported that the journey ends on a positive high (and with a sense of relief!).

Whilst many aspects of the journey are rational, emotions underpinned how consumers responded and behaved throughout each stage.

"Excitement at the start for sure. Oh, wow, this is really cool... Then frustration, this is so annoying that we can't do that and now we have to keep paying these stupid power company bills... And now accomplishment and relief! It's been a journey." –Purchaser of solar

"We were curious about solar but also apprehensive in terms of our own preconceptions prior to research... Optimistic about the future of solar after discussions with friends who have installed it." –Investigator of solar

"Surprised that there are so many components that need to come together to make solar viable and disappointed my place (at that time) wasn't a good fit."–Intender of solar

Once consumers are on the journey, they are trying to make solar happen.

Once consumers are on the solar journey, their mindset shifts. They're no longer asking whether solar is a good idea – they already believe in the value of the technology.

Instead, the focus turns to whether solar is right for them, right now.

It becomes a practical challenge: how and when can they make it happen? This action-oriented mindset shapes much of the journey. Life circumstances and financial readiness play a key role - factors that ultimately determine whether they can follow through and install solar.

"For us it was going to be inevitable that we were going to end up with solar at some stage. I've wanted it for 10 years or more. It's only now that we can make it work." – Intender of solar (down-payment made, but not yet installed)

Pauses in the journey does not mean a lack of interest or giving up, most consumer come back when the time is right.

The research showed us that consumers who have actively been on the journey will come back to the idea when the timing is right - sometimes after years. Even among those who have installed solar, many describe long gaps of four to five years before taking the next step.

The common labels of ‘investigator’, ‘intender’, or ‘purchaser’ suggest a clean, linear journey. In reality, the path is far more complex. Consumers pause, re-engage, and move forward in their own time.

The right time is a matter of personal context

The decision to invest in solar is rarely impulsive. It’s shaped by personal context. For some, it’s a push factor - solar is part of a bigger home project, like a new build, renovation, switching to electric heating, or installing an EV charger. These consumers see solar as one part of a wider investment in their home.

For others, it’s a pull factor - rising power bills or an increase in energy use shift solar from a future goal to a financial necessity. In both cases, action happens when the timing aligns with what’s going on in their lives.

[Looked into it 10 years ago, installed in the last year]

“We've recently moved into a new home. We've been thinking about solar for quite a while, but our previous home needed work done on the roof. We didn't want to install it and then have to remove it. When we moved we made solar high on our priority list and finally we’ve got it." – Purchaser of solar

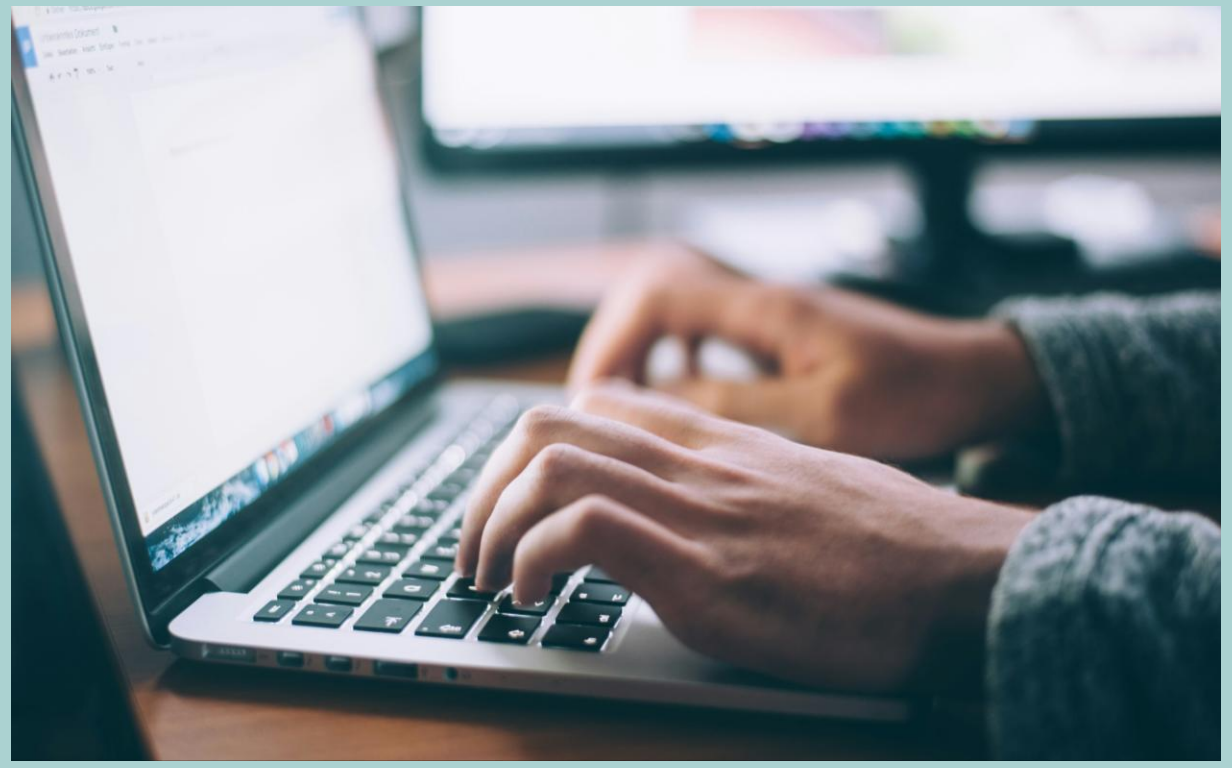
Research is constant throughout the journey, the depth depends on the consumer's level of interest in solar.

Information seeking isn't limited to one stage.
The majority of consumers return to research again and again - gathering new information, revisiting earlier findings, and topping up what they already know.

Everyone moves through a process of learning and information absorption, but not all start from the same place.

Those with a strong interest in solar or renewables are often further ahead. They dive deeper, seeking technical detail and comparison. Others can feel overwhelmed, unsure how much information is enough or where to begin. For some, research builds confidence. For others, it eases anxiety, and sometimes, it adds to it.

What and how consumers are researching is explored in the next section where we deep dive into the journey.



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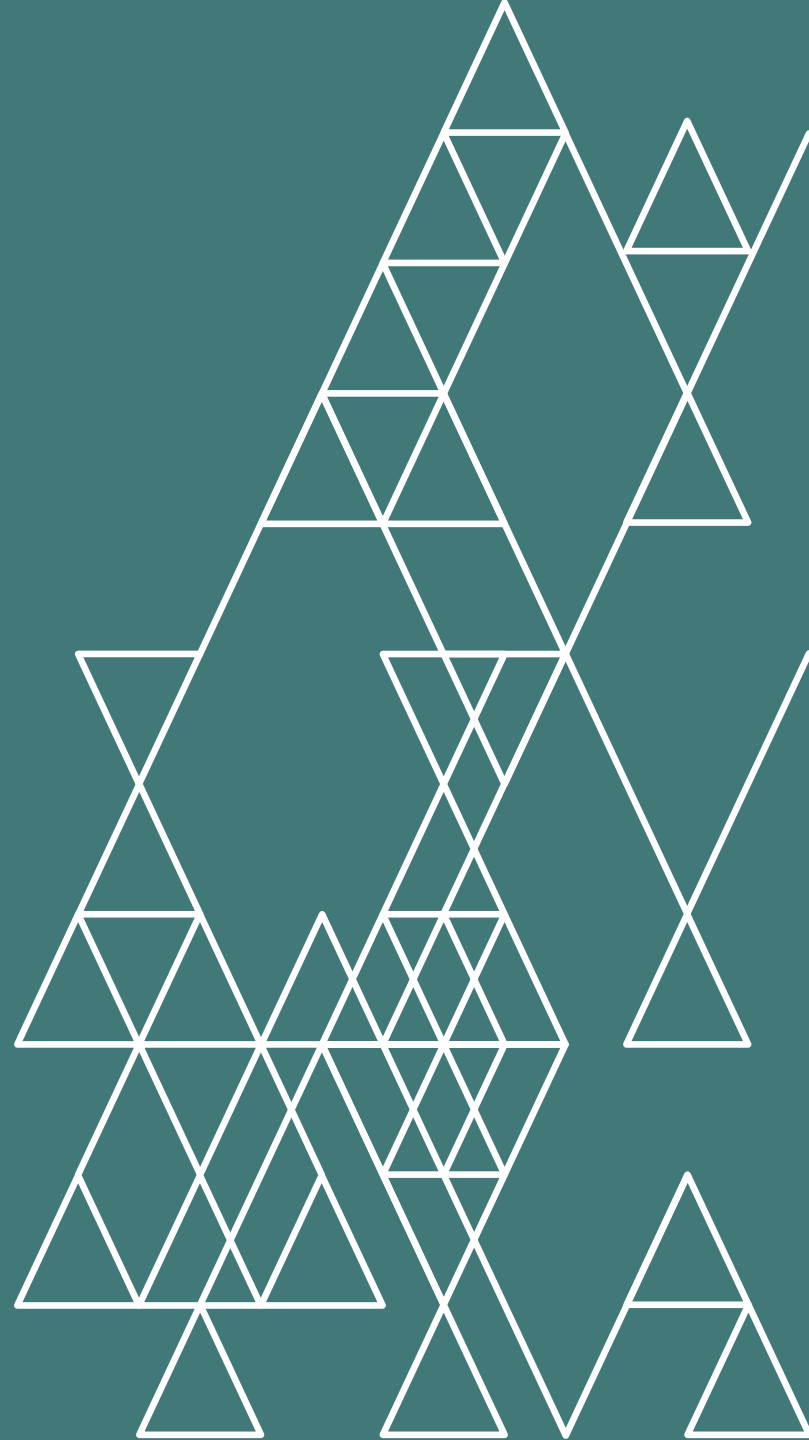
Unpacking the consumer journey stages



There are nine stages to this consumer journey

Pre-awareness

Passive exposure through media, conversations, and industry trends.

Initial Interest

A trigger that prompts them to think about solar as an idea for them. It's the spark in their mind, no action at this stage.

Exploration and Early Research

General information gathering, learning about solar, starting to understand if solar is right for them now (circumstance, lifestage, lifestyle).

Evaluation and Deeper Research

Assessing solar against decision making criteria, deeper research to support their evaluation

Choosing the right supplier

Accepting a supplier quote to lock in their provider

Financial commitment and purchase

Financial commitment, finalizing plans.

Installation and Setup

Physical installation, transition to solar use.

Adjustment and Living with Solar

Learning system performance, realising energy cost savings, adjusting lifestyle/ energy usage habits, supplier aftercare

Reflection and Advocacy

Sharing their experience with others

Before consumers begin

Discovery, learning and evaluating

Locking it in and execution

Post-install, living life with solar

Stage 1: Pre-awareness

Consumers passively or actively encounter solar through media, conversations, or industry trends, shaping early perceptions.

Summary

Consumers absorb information from various sources out of curiosity, like hearing about it on the radio, or because it's visible, such as seeing it on houses, but not all of it is accurate.

This can prompt dreaming about solar - aspirations to live off-grid, gaining energy independence, or saving money. However, it is still a pipe dream at this stage without serious consideration.

What consumers hear and think about solar at this stage can lead to misconceptions forming before consumers actively engage. This can later slow decision-making or create unnecessary barriers.

"My first experience of solar was seeing fields of solar panels on a TV show, at the time thinking this was a no-brainer to save money and support climate change." – Intender of solar

Many New Zealanders have had some touch point with solar. It's often passive, but consumers are absorbing information about solar long before actively considering it.

Nearly everyone has some exposure to solar - through media or news, advertising, government initiatives, friends and family word-of-mouth, hearing from their children who are learning about it at school, or seeing it for themselves on buildings or in fields. Most of this is passive absorption of information at surface level depth.

Solar isn't top-of-mind for most people at this stage, but impressions form long before they actively consider it. Some who are interested in the topic are more actively engaged with information at this stage, but are generally exploring the technology/ topic, rather than as a product for themselves.

While most impressions are positive, some outdated beliefs persist.

"I've been aware of solar for a long time... for 10 years or more... I was aware of things like what Tesla was doing in the US with SolarCity."- Purchaser of solar

Early impressions shape understanding, but not all of them are accurate.

Common misconceptions mentioned by consumers.

Some consumers still held these beliefs, while others had gained clarity later during their journey.

Solar doesn't work in cloudy weather.

"I've heard from friends saying in Wellington because, we don't have enough sun here that solar panels are not going to work." – Purchaser of solar

"Moving from the South Island to build in the Coromandel was a good opportunity to have solar given the sunshine hours there." – Investigator of solar

You need batteries for solar to work.

"Something else I learned was that if you do not have a battery in your solar complex you are still tied to the grid, you have to import and export."

– Purchaser of solar

Learnt payback periods weren't as long as expected.

"The ROI years ago was 25-30 years, now it's about nine years or less."

– Intender of solar

Solar is evolving so fast—it's better to wait.

"Technology was moving in leaps and bounds. It never seemed like there was a good time to get into it because you'd have instant buyers' remorse."

– Purchaser of solar

Dreaming can start to happen at this stage and curiosity builds over time.

Some are intrigued by technology, while others dream of an off-grid lifestyle.

However, at this stage it's a distant idea. Exposure to solar often creates a "one day" mindset - people put it on their future consideration wish list.

The next step? Something needs to spark a deeper personal interest, triggers to turn passive awareness into active interest.

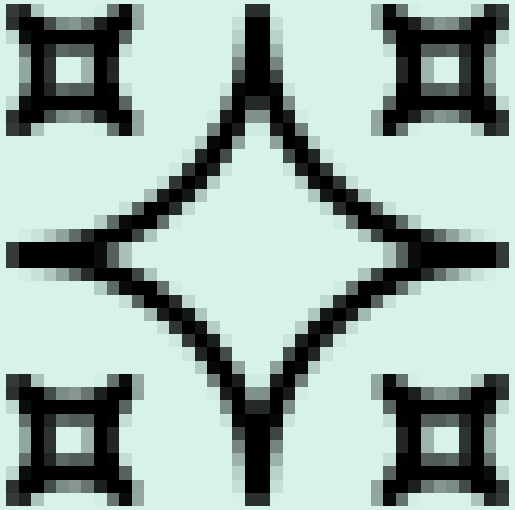
Consumers dream of:

- **A smart financial move** – a way to gain energy independence and reduce bills.
- **A long-term investment** – valuable, but something to do when the time is right.
- **An exciting innovation** – a step toward a more sustainable future.

"I always had this weird tree hugging dream where we get off the grid completely, put a battery in, put panels on the roof, thumb your nose at the power bills." – Intender of solar

Stage 2: Initial interest

A specific catalyst, like rising power bills, a high energy usage appliance, a new home, or someone they know getting solar (friends, family, neighbour) prompts consumers to start thinking about a solar system for their home.



Summary

This is where the journey (officially) starts. The initial interest stage is characterised by a catalyst that sparks active consideration.

These moments may not immediately result in action, such as researching or seeking advice, but they trigger a shift in mindset - solar becomes something consumers see as a potential solution or something they want in their lives.

Entry points to take the next step can be unclear (where to start, what to look up).

“It was seeing the increasing energy prices. That was a major driver for us... We talked about it for a few years, but ultimately the catalyst, it was one way of shielding ourselves against the winter costs that were coming on.” – Purchaser of solar

A catalyst will shift consumers from passive awareness into active interest.

This can be a hard prompt – immediate external pressures that force consideration (more common)

- Power bill hikes (either due to energy prices or usage)
- Planning to build a new house or home renovations
- Change in financial capacity for a minority (inheritance, 0% green loan offer, eligibility from the bank)

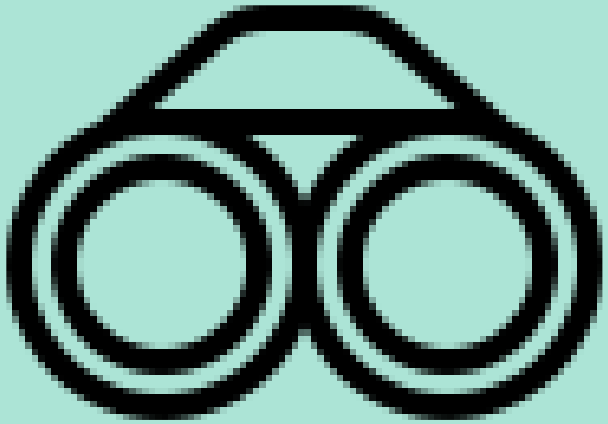
Or a soft prompt – gradual influence driven considerations (less common)

- Visiting friends, family or neighbours who have installed solar
- Hearing about solar on a radio show (solar expert speaks on Radio NZ)
- Seeing solar at a home show

When consumers decide to act on their interest the entry point for the next step can be unclear - where to start, and what to investigate.

Stage 3: Exploration and early research

Consumers seek general information about solar, whether it's suited for their life stage/style, costs estimates, and benefits, often engaging in surface-level learning.



Summary

Consumers enter a loop - researching to answer the question 'is this the right time for me?

Consumers are trying to get a broad understanding of solar and what owning a solar system would entail.

For most, it's not about diving into the specifics of their roof just yet, but using proxies to get a sense of what solar might look like for a house, situation, or use case like theirs.

The learning curve can be long. While some misconceptions are cleared up, new questions and considerations emerge.

The sheer volume and complexity of information can create hesitation, making it hard to navigate through different sources. Many consumers pause and revisit their research over months or even years.

"I didn't know much if anything about solar when I started. Give me a basic understanding of what is involved and the key considerations. I.e. sunlight hours, roof direction, usage pattern, selling back to the grid, limitations of systems without a battery, grid tied or not and batteries." – Investigator of solar

As solar becomes a real consideration, consumers seek practical information, but many struggle with where to start and who to trust.

"It would have been great to compare all products in one place and talk to someone who could make it super clear about the whole process. Everything seems overly complicated." – Investigator of solar

Effort on research can be a quick scan, while for others, it's an in-depth journey.

Consumers typically fall into one of three groups:

Extensive research, for the love of it
This group enjoys the process. They dive deep into the detail, comparing brands and products, analysing panel specs, battery performance, and inverter options. They often build spreadsheets to model long-term returns. For them, research is part of the fun – they're curious, confident, and motivated by interest and the satisfaction that comes from fully understanding the details.

Extensive research, for reassurance (most consumers)
This is the most common group. They invest time and energy into research because they believe knowledge reduces risk. The goal is confidence – but the process can be overwhelming. This group is more likely to get stuck in research loops, uncertain when they've learned enough to make a decision. Nervousness and hesitation are common and recurring for this group.

Bare minimum research
These consumers are typically financially ready to go. They're committed and comfortable with the investment, so they focus on just enough research to feel confident. Whilst they are still doing some research, it's to feel they've done their due diligence rather than developing an understanding of the category or options. While fewer in number, this group tends to move through the journey quickly and decisively.

Most consumers begin their research online, but sources vary.

The majority start with extensive online research, while some skip this step entirely, relying instead on recommendations from a trusted tradesperson or supplier.

Google deep dive

- Direct to solar company (nationwide brands like Harrisons vs. smaller local suppliers)
- Comparison websites (Mysolarquotes.co.nz)
- 3rd party websites (EECA / Gen Less, Local council, Consumer NZ, Homes.co.nz)
- Power companies (Powershop – cited as a positive experience)
- International sites (Australian and US for tech, innovation)
- Review, testimonials (ideally independent sources)

Social media

- Facebook, YouTube, Reddit / Forums often used for peer reviews and informal advice.

Trusted individuals

- Tradespeople and local electricians with strong reputations influence decisions, particularly in regional areas.
- Friends and family help alleviate concerns and validate choices.

Consumers are looking at a mix of articles, videos, photos, reviews and blogs from real people, and online tools across these sources.

A trusted recommendation often carries more weight than hours of online research, particularly for those who are overwhelmed but the quantity of information and find it difficult to navigate the many voices.

"It probably didn't do that much research as I should have, I looked at one other supplier. I had dealings with this company, they put in the solar lights for my garden so I knew they were trustworthy, they are a good local company and he wasn't going to put us wrong."
– Purchaser of solar

Consumers rely on independent sources to cut through conflicting messages and simplify technical complexity.

People appreciate having independent, neutral sources of information when researching solar. While suppliers and tradespeople provide useful insights, there is a clear demand for third-party guidance that isn't tied to a sale.

Why third-party voices matter:

- Consumers want a non-biased source to validate what they hear from suppliers.
- Organisations like EECA, Gen Less, and Consumer NZ are seen as credible and help cut through misinformation.
- Some expect the government to set clear standards and provide guidance on best practices.

EECA / Gen Less already have a good reputation as a trusted source. More than half of consumers consulted knew about or had used resources and content on these websites.

"There's a place for the likes of EECA to moderate some of that, give some sort of unbiased information, especially on the different technologies around." – Intender of solar

"I would like to have some form of government information. Because you'd expect it to be unbiased." – Intender of solar

Topics of research are broad, ranging from how a solar system works, to range of products, who supplies, and demystifying the financial side.

Key area	What consumers are researching
Financing Cost benefits/ savings	• Getting "quotes" from suppliers, ballpark costs for 'a property like theirs' (often generated by a self-serve calculator or submitting a form to a supplier) • Financing options (loans, subsidies available, etc.) • Their own calculations – using their power bills, approximate investment, and potential savings • Searching 'what is the payback period'
How a solar system works	• 'Does it work if you don't have a north facing roof? How much sun is enough to make it work?' • 'How long will a system/ panels/ battery last?' • 'How much can I put back into the grid? How does that work?' • 'What are the advantages of having both solar panels with batteries versus panels alone' • 'How do batteries work?' • 'What's an inverter, how does it work?' • The "science" behind solar panels (for some)
Products/ components	• Panels: low awareness of brands overall. Few are researching into brands other than factsheets on a supplier's website. • Batteries: slightly more awareness of brands (often from EVs), more likely to research 'long lasting battery' rather than going to the brand straight away. • Inverters: only a few are researching.
Suppliers and installers	• Wide search for who offers solar • Interest in local installers/ suppliers in my area (especially in regional areas) • Interest in long standing installers/ suppliers of solar (10+ years) • Interest in those with a positive reputation (based on reviews and testimonials)

"If I do go down the road of taking out a loan, how long it's going to take for me to pay it off?" – Investigator of solar

"I also went and googled the panels. I found out that they do something very similar." – Investigator of solar

"I started by Googling solar generation. You can get a quote online. And then looked for local companies." – Intender of solar

Using many sources of information can help consumers corroborate facts, however overload and paralysis can halt the process.

Information overload can happen on multiple occasions during this stage, causing some consumers to delay or pause their solar journey. The time consumers spend in this stage can vary significantly as a result.

Most consumers feel there is an abundance of information available. While the quantity seems sufficient, it may not always come from the trusted sources they prefer - such as neutral third parties. Some consumers are specifically looking for more detailed information from these trusted sources.

The issue isn't a lack of information, but a lack of trust. Consumers struggle to determine which sources are credible, which are up-to-date, and who is providing truthful information.

A common frustration arises when consumers see something abroad that they can't find in New Zealand, leaving them feeling like information is missing. For example, information on government subsidies might be scarce, leaving a gap in their understanding without any clear explanation that it's simply not an option here. This uncertainty can lead to questions about the quality and reliability of the information available.

Key information barriers that slow progress:

- Information overload - too many sources lead to confusion.
- The research "rabbit hole" - deep dives that become overwhelming.
- Pushy salespeople and trust issues - concerns about "cowboy" suppliers
- Lack of transparency - unclear costs, sponsored content, and inconsistent pricing.
- Difficult quote comparisons - ballpark figures often mislead, with actual costs varying widely (e.g., $20K vs. $55K).

"I feel like you could easily Google and get down the wrong path, get the wrong type of information." – Investigator of solar

"I like to look for a variety of sources and see if they're basically all saying the same thing. So that the information is ballpark correct." – Investigator of solar

Progressing to the next stage of the journey comes when consumers answer ‘yes’ to the question ‘is solar right for me now?’

For many consumers, the answer comes down to:

- Financial readiness: **“We'd got a quote for solar from Harrison's several months earlier and decided that it wasn't in the budget at the time.”**- Intender of solar
- Home suitability: **“A local roofing guy was around for some other stuff, so we got him to assess that area and make sure it’s all looking good.”** - Purchaser of solar
- Technology confidence: **“I first started at least 10 years ago, but at that point the technology wasn’t as good as it could be.”** - Purchaser of solar

If the answer is no, it doesn’t mean abandoning solar.

Some Investigators pause here. But we know from our purchaser insights, that many eventually return when the timing feels right.

What brings them back?

- Increased financial security/ capacity - feeling ready to invest.
- External triggers - incentives, energy prices, or seeing others install solar.
- Simplified decision-making - finding a trusted supplier or clearer information.

It is here or in the evaluation stage where Investigators are likely to drop out of the journey.

This is when research (either general or deep) reveals to them that solar it is not a feasible option at that time.

The main reasons Investigators deciding against solar

- Cannot afford it / cannot obtain financing.
- Property is not suitable or optimal for a solar system, at all or would require renovations/ upgrading.
- Are not confident they will be in their property long term to reap the benefits.
- Other financial priorities are more important at this point in life (e.g. private school tuition, holiday, other home renovation).

Investigators do not experience ‘unique’ barriers, rather, the above reasons outweigh the decision to proceed at the time they are making the decision.

“Our roof is 50 years old and may need to be replaced in the mid-term and how much this would cost to remove solar or would it be best to wait until roof is done.” – Investigator of solar

“We would probably use a green loan from our bank, but we are fixed for another 18 months on our mortgage. Once our repayments are lower, solar will be a major consideration for us." – Investigator of solar

Stage 4: Evaluation and deeper research

Evaluating if and how they can make solar happen for them.

Summary

Consumers move from broad exploration to structured decision-making, balancing feasibility, financing, and supplier trust.

Clarity around the cost and how they will finance it is essential at this stage. Obtaining quotes from suppliers is a key feature of this stage. It can be a reality check for many when their expectations around financing/ cost or solar system requirements are misaligned to the reality.

There is serious consideration about the trade-offs they are willing to make to assume this new financial responsibility (what else could they be spending their money on, what will they have to sacrifice to service the loan, etc.).

Where there are knowledge gaps needed for their evaluation, additional research can happen – information sought is detailed and specific to their home/ situation. Neutral, reliable information is sought to help them make a ”evidence based” decision with confidence.

“My husband created detailed spreadsheets tracking daily consumption over months, how much solar panels would produce by square meter to work out how many panels we’d need. And then we’d talk to companies and get their quotes and data on what they recommended and see how that would impact our power consumption.” – Investigator of solar

Now consumers are serious about making solar a real option, they break down the decision into four assessment areas.

Key area	What consumers focus on	Common barriers
Financing	• Comparing loan vs. cash purchase options • Understanding payback periods and ROI • Evaluating PPA (Power Purchase Agreements), green loans, and incentives (e.g., SolarZero, council loans) • Checking hidden costs (installation, maintenance, service fees)	• Uncertainty about options—consumers feel financing choices aren't well explained. • Lack of direct comparisons—hard to tell which option is best for their situation. • Confusion around PPAs – only those who have had experience with SolarZero understand this.
Technical considerations	• Comparing solar panel and battery brands (efficiency, durability, warranty) • Evaluating system size and compatibility with their home • Weighing the benefits of battery storage vs. exporting power to the grid • Understanding maintenance requirements and product lifespan	• Too much variation—different brands and specs make direct comparisons difficult. • Uncertainty about warranties and performance over time. • Difficulty in predicting how much power it will really generate.
Practical fit	• Assessing roof suitability (angle, shading, structure) • Evaluating energy usage patterns—how much power do they need? • Understanding whether they'll need additional electrical upgrades (e.g., switchboard capacity)	• Not all homes are suitable—some consumers realise their roof is not ready or appropriate. • Unclear installation requirements—uncertainty about whether modifications are needed. • Concerns about aesthetics—especially for visible roof panels.
Suppliers and installers	• Obtaining and comparing quotes from 2-3 providers (based on home site visits) • Researching company reputation, warranties, and post-installation support • Checking customer reviews and word-of-mouth recommendations • Assessing sales tactics—some suppliers are seen as pushy	• Mistrust of some suppliers—concerns about aggressive sales or hidden costs. • Hard to compare quotes—pricing and package details aren't always transparent. • Lack of independent validation—some consumers rely on forums, others on personal recommendations.

To make their assessment, consumers may have to do additional research that covers similar ground to what they have investigated before. However, at this stage they are getting more specific with their inputs to generate an actual picture of solar that is specific to and grounded in their personal circumstance. General estimates are replaced by precise information.

"We had to weigh the advantages of micro-inverters against their higher cost and consider factors such as the maximum number of panels per string and how to divide the panels among different strings." – Purchaser of solar

Consumers are typically getting quotes from 2 to 3 suppliers, but that doesn't mean they are all being considered.

Due-diligence for a 'sizeable investment'

Obtaining 2-3 quotes from suppliers (where they had a house assessment) was commonplace – at the minimum a local supplier and a larger 'well known' company.

Local suppliers in higher favour

Some preferred companies with a national footprint for their scale and perceptions of being longstanding and reliable.

However, many favoured local suppliers or those with a local presence (especially those living in regional areas) for reputation, word-of-mouth recommendation, personable conduct, and the reassurance that if something went wrong, they were just down the road.

A long-standing supplier is compelling

Currently, consumers felt that there were enough options for suppliers in the market, and that as a consumer they had choice (local vs national, installer only vs full service, distributors of different product brands).

This is in part because most consumers consulted were seeking a longstanding supplier of solar products and installs, rather than a whole lot of new players who did not yet have a proven track record.

Solar companies mentioned by consumers:

- Harrisons
- SolarZero
- Sunshine Solar
- Goodyear Electrical
- Solar Worx
- Lightforce
- Total Solar
- NZ Solar
- Hoskins Energy (local Wairarapa)
- Garden City Solar (Christchurch)
- McNae Solar and Energy (Palmerston North)
- World Solar NZ (Invercargill)

"It always makes you feel a bit more comfortable when you're buying from a bigger organisation. Because you've got that backstop. If something goes wrong you know that they're not going to go out of business." – Investigator of solar

"We started with some of the national companies, the big ones and then the local companies, we went with the local one because the guy was so knowledgeable."- Purchaser of solar

Solar feels more attainable when financing is clear.

Financing is one of the biggest decision points in this stage, if people aren't aware of the options or don't understand the possibilities, it can slow down or create another pause or break in the journey.

"Doing the math, I weighed up the initial costs, the reduction in my bills, the different power companies' schemes and buyback rates. This was a mission and took months, but worth doing for peace of mind that I was making a financially positive decision." – Investigator of solar

How consumers approach financing

- Some prefer outright purchase *("I want to own it, no debt").*
- Many choose to take a green loan or another 0-1% loan *("It makes more financial sense to borrow at 0-1%").*
- Some considered taking out another loan or extending their home loan (this was often considered but not seen as desirable).
- Others explore structured financing *("I'd rather pay in instalments if the savings cover it").*
- Few fully understand Power Purchase Agreements (PPA)—many confuse them with traditional loans. Of those who knew of PPA, SolarZero came to mind.
- Banks and suppliers are key sources of financing advice, but information can be inconsistent.

Most people have heard of Green loans, but it's not accessible to all.

- Some have already used this option on other energy efficient products in their homes.
- At this time, most were finding out about green loans through their bank or other advertising. Few discovered it as part of their solar journey or from suppliers. There is appetite from most consumers to know about green loans in the exploration and early research stage.
- Earlier knowledge of the green loan (as a prompt in the initial interest stage) was only a factor for triggering investigation into solar for a minority.
- People without a mortgage, especially retirees talk about challenges and frustrations not meeting the requirements for the loan.
- 0-1% loans were a preferred option for consumers, even if they had the capital to pay outright.

Understanding SolarZero - The liquidation has clouded the market with misinformation.

Those who researched and chose SolarZero see clear benefits:

No upfront cost

- Makes solar accessible for those who can't buy outright.

Immediate savings

- Some report financial benefits in the first year.

Confidence in the model

- Those who understand the process feel reassured.

Positive experience with customer service since liquidation

- SolarZero has kept customer informed, and reassured on business as usual and aftercare.

In New Zealand, Power Purchase Agreements (PPAs) for solar allow businesses and potentially homeowners to benefit from solar power without upfront capital costs.

But for those relying on hearsay, uncertainty takes over:

Confusion around ownership

- Some mistakenly believe they lose control of their system.

Influence of misinformation

- Those without firsthand experience sometimes see it as risky or misaligned with ownership expectations.

Concerns about home resale

- Some worry about selling a house with a SolarZero agreement attached.

Trade-offs that come with a new financial responsibility can deter some consumers at this point in the journey.

Whether it is purchasing solar outright or taking on loan repayments, many consumers actively consider what else they could be spending that their money on.

Unlike major expenses like holidays or home renovations, where people willingly cut back to save, for some consumers solar doesn't feel urgent enough to justify lifestyle sacrifices (yet). This was observed among some Investigators and the experience of some Intenders and Purchasers at earlier pauses in their journey.

A holiday is immediate, solar is long-term.

- People are more willing to save for short-term rewards than future savings.

No urgency to act.

- Unlike a mortgage or home repair, solar feels optional, reducing motivation to save.

Uncertain payback period.

- The financial benefits feel distant, making it harder to justify upfront costs.

"Given that this isn't my forever home, a big investment with little return initially and then a long payback term, isn't very appealing. And just the general economy state means that although I know it might be more cost-effective in the long term, I feel I need to retain cash for emergencies instead." – Investigator of solar

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Adoption is easier when financing removes the need for lifestyle sacrifices. For some, 0-1% loans helped to overcome this barrier.

Stage 5: Choosing the right supplier

Consumers formally accept a supplier quote and engage the company.

Summary

Consumers select a provider and accept their quote.

Often the final supplier choice isn't just about price - it's about feeling in control, reducing risk, and having confidence in the decision.

Marks a milestone - consumers feel they have made a significant step towards solar for their home.

"I want to choose a supplier that's not a cowboy, someone who has been around for more than 10 years. The business itself should be around when I need a service—not just for the install." – Intender of solar

Suppliers play a critical role in shaping consumer confidence, and consumers feel the pressure to choose wisely.

"When we started getting quotes I was judging the salespeople on whether I knew more about their products, if I ask questions that they didn't have the answers to, then it was possibly the wrong company to go for." – Purchaser of solar

"It was patronising, it's like they didn't put any value on the fact that we wanted to know the details." – Intender of solar

People compare suppliers by making a pros and cons list, asking:

Do I trust them?

→ Reputation, past experiences, and word of mouth matter.

Are they clear and upfront?

→ Transparent quotes tailored to needs boost confidence.

Do they know what they are talking about?

→ In depth technical knowledge about the products and what is suited for different properties/ people/ circumstances (not a black box solution). Having more knowledge than the rep is not a good sign.

Are they supportive and support my learning?

→ Engage with consumers at their level but are not condescending.

What happens if something goes wrong?

→ Warranties and aftercare reassurance are key.

Do they arrange approvals and consents on my behalf?

→ Supplier works with the local council so that the responsibility is not on the consumer.

Experience with suppliers in the ‘courting phase’ varies but every purchaser found one that they were satisfied with.

Suppliers are not always consistent with their delivery – some took longer (more than a week to respond) others were inconsistent with their communication (sometimes proactive, other times reactive) but for the most part, at this stage suppliers are responsive, and sometimes bordering pushy. Some consumers felt that this attentiveness was for the sale.

“I submitted a quote to Harrisons on the same day as Sunshine Solar. I never heard back from [Harrisons] for three weeks, and the guy could only schedule in two weeks later to do an appointment.”
– Consider of solar

A successful supplier will help de-risk the final decision.

Consumers say "yes" and lock it in when suppliers provide:

Clear, tailored quotes	No ambiguity on costs, installation, or warranties
Strong communication and responsiveness	Immediate answers eliminate doubt
Aftercare assurance	Knowing they're supported post-installation
A seamless process	The decision feels low-risk and effortless
Takes care of council approvals/ consents	Streamlining who consumers have to deal with

"It was just that reassurance, there was a high level of transparency as to exactly what your expenditure was going to be in terms of the fixed contract. That we knew exactly how much we had to pay per month in terms of the subscription. There was a high level of transparency surrounding how much we had to buy off the grid and how much we could sell back to the grid." – Purchaser of solar (SolarZero customer)

"It was all very individualised, when we got to the final decision on how many panels they send you quite a detailed pack that has a lot of the technical information so you can be assured... My expectation is that once it's in, they'll take us through that step by step so we understand how to read the app and what it means." – Intender of solar

Stage 6: Financial commitment and purchase

Consumers commit financially – securing the loan or making the first down payment - often feeling both excitement and apprehension as they finalise installation plans.

Summary

At this stage, consumers are locking in their finances, but it can be hard for some to secure financing or a lengthy process with loan applications.

Clear communication and proactive support by the banks, lenders, and their solar supplier can smooth the journey.

Making payment signals the ordering of the products (panels, battery, inverters) – it becomes a waiting game.

As they wait for their products to arrive, there is lack of clarity around what comes next

"When I was signing the contract, I was really excited, but I was definitely hedging my bets on whether the panels were going to make it or not. Nervous." – Purchaser of solar

Commitment brings excitement but also last-minute nerves — locking in finance makes the decision real.

While there is excitement about finalising plans, there is also apprehension due to paperwork, financial logistics, and the finality of the decision.

Securing finance

- Some pay upfront, while others choose loans, particularly 0%-1% interest green loans, which reduce perceived financial burden.
- Even those who can pay upfront sometimes opt for a loan to retain liquidity.
- Adding to their mortgage or an existing loan was unappealing to most, preference was for a discrete loan.
- Banks and suppliers manage much of the loan approval process, reducing customer friction.
- The waiting period for loan approval can cause frustration, but it is generally seamless once approved.

End cost often exceeds initial expectations

On reflection, most purchasers said that the final price was higher than what they had initially expected at early stages of exploration and research.

However, any misalignment in pricing expectations to date happened long before this stage of financially committing.

Getting quotes specific to their property in the evaluation stage promptly reset purchasers' expectations, and since then many claimed that they had time to "come to terms with" what would be the final (or close to final) pricing.

With payments made, research ends, and its time to wait...

Logistical hurdles beyond consumers' control test patience.

- Some delays occur due to supplier stock availability, loan processing, or miscommunication.
- Waiting on council approvals or consents.
- There are still emotional highs and lows: relief after loan approval, but impatience waiting for installation.
- Consumers expect clear communication from suppliers during this phase.

"At the start the sales people are quick to answer your questions, when you sign a contract and once you're paid sometimes you have to call and see find out what's happening at the next stage. It wasn't a massive delay but I was following up." – Purchaser of solar

"Two or three weeks before the install date they rang me to say sorry the panels aren't going to make it in time. They said we can either keep your install date the same and we'll come in and put your battery in. We'll put all the racking in on the roof and get everything ready, but we'll have to rearrange another install date for your panels. Chances are that will be January or February [2 months after originally scheduled]." – Purchaser of solar

Stage 7: Installation and set-up

The physical installation of their solar system occurs, with some experiencing logistical complexities or delays but generally feeling optimistic.

Summary

For most, installation is quick and seamless, reinforcing confidence in their decision. However, inconsistencies in installer quality can impact the experience, leaving consumers frustrated.

Many don't know what good looks like, what is normal (e.g., delays) – it's unchartered territory.

They are seeking extra reassurance from their installer that the set up was successful.

A clear handover process, ongoing communication, and professionalism from installers help smooth the transition and ensure consumers feel supported beyond installation.

"We approved the quote, we paid the deposit, he gave us a date, and he was here, and they did all the electrical stuff in two days. He did have to come back because the heat pump was low in stock, that was five days later."
– Purchaser of solar

Installation is fast and seamless for most, but experiences vary.

Most installations are completed efficiently.

- Many consumers are surprised at how quick and easy the process is, with the physical installation of panels often only taking 1-3 days. Where installers had to come back to the property to check the meter board and the connection the total time for install could be up to two weeks.

But some installers fall short.

- A lack of care from certain installers—rushed jobs, poor communication or leaving behind mess—can lead to frustration and a disconnect between expectations and reality.

Sales and installation misalignment causes confusion.

- Some consumers feel "palmed off" between teams, with multiple tradespeople cycling through their homes, leading to confusion over responsibilities.

"The only downfall was they hadn't switched us over so we were thinking we were saving money however we were still on electricity." – Purchaser of solar

A great installation experience and wrap around care strengthens confidence in solar.

Professionalism and efficiency set great installers apart.

Consumers value knowledgeable installers who take the time to explain the process, work neatly, and show care in their work.

Pre- and post-installation communication enhances trust.

A quick call before the install to confirm details and a follow-up after completion makes consumers feel supported.

Local installers stand out for their personalised service.

Smaller, community-based providers are often preferred for their flexibility, faster response times, and seamless experience—handling both sales and installation, which builds trust through direct, consistent communication.

Clear system handover prevents uncertainty.

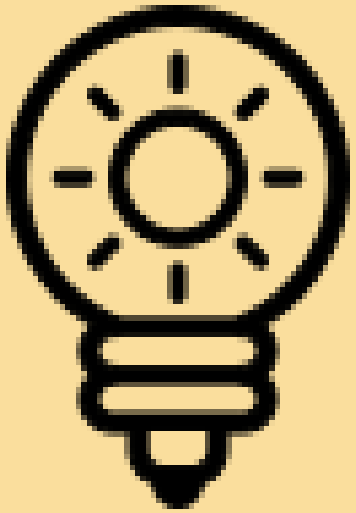
Some consumers feel lost after installation, unsure how to monitor their system or optimise savings.

Those who receive clear guidance on system use feel more in control and confident.

"They came back a few days later and did the next chunk and then on the third day, they obviously, like, threw everything at it. And we had the boss of the company here, and they were. They worked to like, 7:00 on the last night to get it done, and they did it." – Purchaser of solar

Stage 8: Adjustment and living with solar

Consumers navigate the initial period of learning about their system performance, realising energy savings, adjusting their lifestyle/ energy usage habits, and ongoing maintenance responsibilities.



Summary

Adjusting to solar is a learning curve - while excitement remains high, consumers face new knowledge gaps, unexpected costs, and ongoing maintenance considerations.

Uncertainty around system performance, billing, and power plan options can create frustration in the early months (1-6 months), slowing full confidence in their investment.

Behaviours change to ‘get the most’ out of it.

Some reappraise their electricity provider, their system and consider upgrades.

However, those who have had solar for more than 12 months generally feel reassured and have a clear picture of the savings and benefits solar is giving them. It is meeting their expectations, but the realisation of this did not come immediately.

“I suppose the initial savings weren't as high as I expected. The solar production isn’t as high, but it is difficult to work out because you can't just look straight at consumption versus what you were on before because you are consuming power into your battery as well and then back out again. It muddies the water.”
– Purchaser of solar (less than 6 months installed)

The first few weeks are full of excitement and adjustment to solar in their home.

Tracking performance becomes a daily habit.

Many consumers frequently check their solar performance on their apps, often describing it as “like a game.” They compare real-time energy generation with household usage to see immediate savings.

“There's an app it shows in real time what your usage is. It’s very well crafted, you know exactly how much you're drawing down off the grid, exactly how much you're selling, and exactly how much you're using out of the solar panels.” – Purchaser of solar

There’s initial uncertainty about system function.

Some are unsure if their system is operating at full capacity, questioning why production varies by time of day or weather conditions. Whilst they had researched this in the early stages of the journey, now that it is put into practice, new realisations emerge.

Those with a clear understanding of the system (and had suppliers who supported with education) adjust faster.

Some experience billing surprises and mismatches.

Some face unexpected energy bills due to misalignment between installation and billing-cycles, or misunderstand how exporting energy works.

Shifting routines to maximise solar benefits.

Consumers adjust their habits to use appliances during peak solar hours and reduce reliance on grid electricity.

This is most common among those who who do not have batteries installed, however some with batteries still do this to ‘get the most’ out of their system.

This often leads to re-evaluating their electricity provider, should they stay or should they go?

Some consumers stay, others seek better deals.

- Those who export excess energy often shop around for better buy back option while others stay loyal to their existing provider if there are other benefits that are more ‘valuable’ to them (for example, evening hours of “free power”).

There’s frustration over low buy-back rates.

- Some are disappointed to find that their exported solar energy earns them far less than they pay for grid electricity. They assumed they were able to export all of their excess power but did not realise that the amount they had exceeded retailers export limits.

Electricity plan confusion leads to inertia.

- While switching providers can increase savings, the complexity of comparing plans discourages some from taking action.

“There's an export limit of 5 kilowatts. Our system could produce 11 and a half kilowatts in AC - electricity that could all go back to the grid but the grid operator Orion in my area have a limit of 5 kilowatts."– Purchaser of solar

Many consumers still don’t fully understand how solar billing works – there is confusion about buy-back rates, billing cycles, and whether switching providers is worthwhile.

The role of ongoing support and aftercare determines the long-term experience.

Post-installation follow-ups vary.

- Some suppliers proactively check in reinforcing confidence, while others provide little to no aftercare.
- An ideal timeframe for follow-ups is at 1, 3, 6 and 12 months.

Maintenance expectations vs. reality is unclear.

- Almost all purchasers assume their system is “set and forget”, especially in the first few months of having solar installed and operational – however they learn quickly that this is not the case, either through informative aftercare from their supplier or seeing that their system is not performing.

The ease of support depends on installer.

- Local installers tend to provide more direct, personal support, while larger providers may feel less responsive or accessible.

Many purchasers don’t know the questions to ask, unless they have friends who have installed they can only rely on their supplier.

After some time with solar there can be a second wave of reassessment.

Some consumers reassess their solar setup as their energy needs evolve once they understand more and have seen how it operates in their homes.

"Battery storage was not an initial thought and I hadn't really thought it was for me, but after this discussion it's a possibility to consider when our children leave home and our family decreases a battery could be of use." – Purchaser of solar

Battery storage reconsidered.

- After a year, some revisit battery options - realising they need more storage or regretting not making the additional investment at the time of original install if savings weren't as high as expected.

Electricity provider re-evaluation.

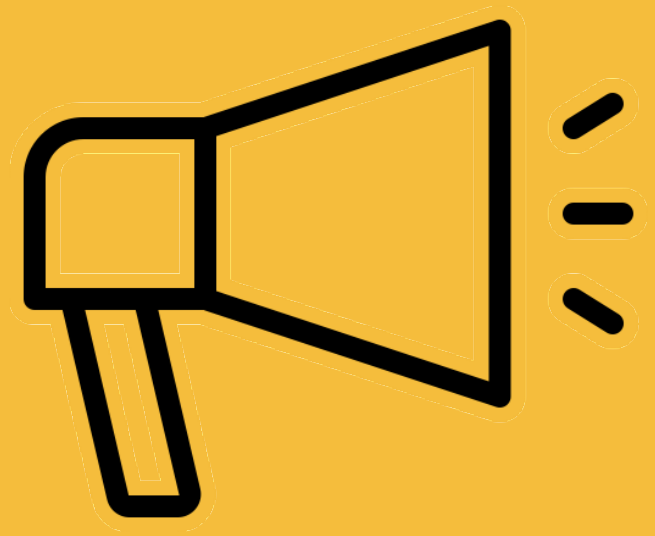
- With a better understanding of their energy patterns, some shop around again for better rates or buy back options.

Confidence in solar remains strong.

- Despite minor issues, most are happy with their decision and see clear financial benefits, reinforcing their belief in solar as a smart long-term investment.

Stage 9: Reflection and advocacy

Many solar adopters become strong advocates, wishing they had installed sooner and encouraging others to take the leap.



Summary

Solar adopters naturally become trusted voices in their communities, driving advocacy through lived experiences.

Talking to others is positive reinforcement about having made the decision to purchase and install.

Early challenges — installation, financing, or billing — fade over time. In hindsight, most see these as minor compared to the long-term benefits.

However, many still lack the knowledge to answer key questions, potentially delaying or misinforming others.

"The moment that stands out the most would be in winter, some of the warm sunny winter days we're still generating a lot of solar. This made such a difference when we were paying the power bill even with the monthly lease fee." – Purchaser of solar

Solar adopters look back and say - ‘I wish I had done it sooner’

There is strong advocacy for solar.

- Many solar adopters become vocal advocates, encouraging friends, family, and colleagues to install solar based on their positive experiences.

Few major regrets, but some wish they had done things differently.

- Some homeowners, in hindsight, wish they had invested in a larger system or added battery storage earlier to maximise energy independence and savings.

Challenges fade over time.

- Early challenges — installation, financing, or billing — fade over time. In hindsight, most see these as minor compared to the long-term benefits.

“I wish I did this two and a half years ago. I wish that we'd started it immediately. I wish I hadn't waited when we bought this house because it would have just been on the mortgage the day we walked in.” – Purchaser of solar

Solar advocates in action, their message is clear: ‘Just Do It’

Homeowners who made the switch overwhelmingly believe it was the right choice, reinforcing solar’s value in energy independence, financial savings, and sustainability.

Word-of-mouth is powerful.

- Personal recommendations from solar adopters are often more influential than marketing or supplier outreach. Their real-world experiences provide social proof and reassurance.

Seeing is believing.

- Having a friend or neighbour with solar serves as a confidence booster—being able to see the system in action makes it feel like a tangible, achievable decision.

“We decided to go with the company that our friend was with because she had it for a year prior to us, and we felt more comfortable, knowing that a friend was using it as she was saving a lot of money on power and spoke highly of them.”
– Purchaser of solar

“Just do it.” – Purchaser of solar

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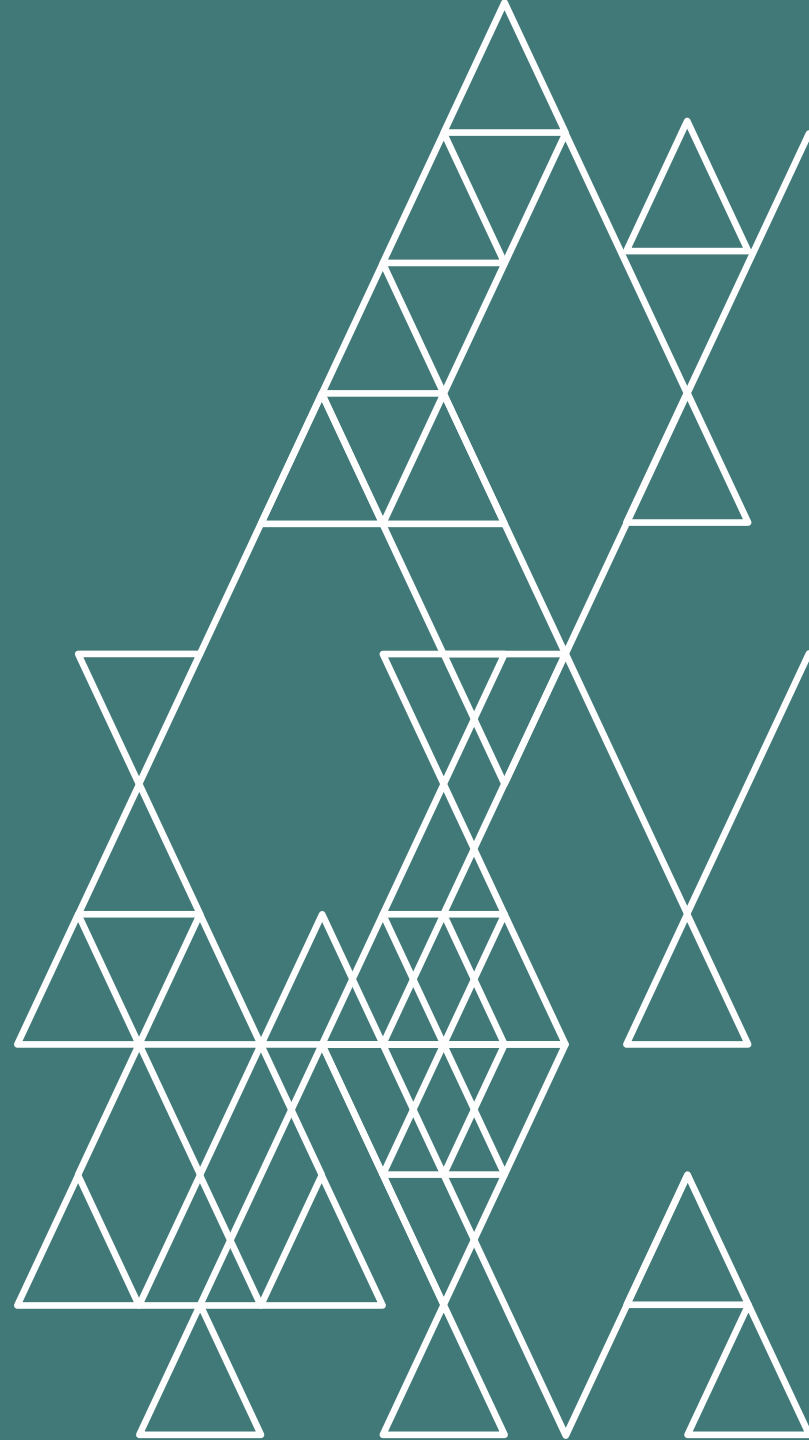
Bringing it all together



Recapping what we know

Solar is a highly desirable investment.
Consumers already see value of solar, they want it, but they need support making it happen. The focus isn't on convincing them *why* to go solar, but rather *how* to make it happen smoothly.

The journey is long but active.
Consumers pause, reassess, and refine their plans over time, but momentum continues.

Key barriers to considering and adopting solar depends on personal context and timing. But these strategic touchpoints can also accelerate decisions.
Financial capacity and home set up/ readiness are the main factors influencing consumers' decision that solar is not right for them now. However, key life events—home renovations, mortgages, and retirement, a significant increase in power bills —create natural windows for action.

Intenders are low-hanging fruit.
Many are ready to proceed but need support navigating finance, supplier choices, and installation logistics.

The main tensions experienced throughout the journey are informational.
Misinformation, too much information, not enough detail or specificity to relate to their own situation, uncertainty about how valid or up-to-date information is, numerous voices speaking, and doubt around which sources to trust can make consumers overwhelmed, frustrated and lead them to pause their journey. This is pronounced in the early research and evaluation stages, but happens at most stages in the journey.

A long journey doesn't mean a lost customer.
Long journeys don't mean lost customers—many are simply waiting for the right moment.

Key opportunities to elevate the experience

Informational tensions to address throughout the journey.

Misinformation, too much information, not enough detail or specificity to relate to their own situation, uncertainty about how valid or up-to-date information is, numerous voices speaking, and doubt around which sources to trust can make consumers overwhelmed, frustrated and lead them to pause their journey.

Make financing clearer.

Both the options - including greater awareness and access to green loans/ 0-1% loans - and helping consumer get a genuine picture of cost and return specific to them.

Show what to expect and what's normal during installation and in year 1 with solar.

Consumers often face challenges when expectations around system performance, costs, and savings do not align with reality.

Clearer communication about what to expect, especially regarding financial payback periods, system efficiency, and energy savings, will help manage customer expectations.

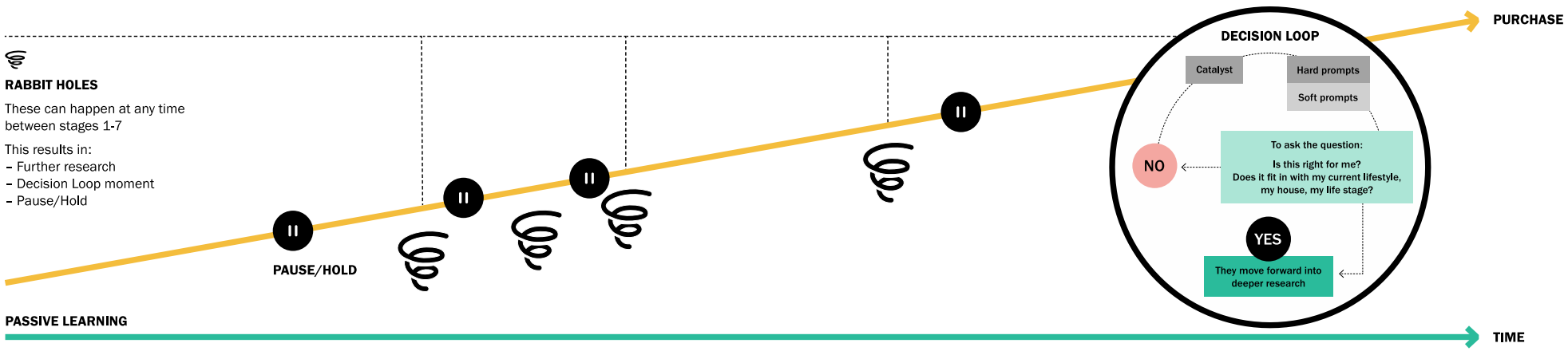
Supplier consistency in aftercare and ongoing support.

Post-installation support is inconsistent, with some consumers feeling abandoned after their system is installed.

Regular follow-ups, clear maintenance expectations, and responsive support networks are key to ensuring long-term customer satisfaction and optimising system performance.

Residential Solar Research Customer Journey

Stages of the Journey	Pre-awareness	Initial Interest	Exploration and Early Research	Evaluation and deeper research	Choosing the right supplier	Financial commitment and Purchase	Installation and Setup	Adjustment and Living with Solar	Reflection and Advocacy
	Passive exposure through media, conversations, and industry trends.	A trigger that prompts them to think about solar as an idea for them. It's the spark in their mind, no action at this stage.	General information gathering, learning about solar, starting to understand if solar is right for them now (circumstance, lifestage, lifestyle).	Assessing solar against decision making criteria, deeper research to support their evaluation	Accepting a supplier quote to lock in their provider	Financial commitment, finalising plans, triggers the ordering of panels/ batteries	Physical installation, transition to solar use	Learning system performance, realising energy cost savings, adjusting lifestyle/ energy usage habits, supplier aftercare	Sharing their experience with others
	Before consumers begin	Discovery, learning and evaluating			Locking it in and execution			Post-install, living life with solar	
Emotional Journey	**Passive curiosity**, some scepticism about it's feasibility or necessity – solar is "for the future" but not a priority.	**Excitement** kicks in, some apprehension due to preconceived notions about cost and complexity – the idea of lower power bills and sustainability is appealing.	**Overwhelm** – lots of information, unclear costs, and varying opinions. Some apprehension and frustration when navigating financial options or dealing with pushy sales people.	**Cautious optimism** – weighing options, learning about financing, starting to feel like a serious possibility. Going too deep and into the rabbit hole can cause overwhelming apprehension and frustration due to uncertainties.	**Anxiety** – fear of making the wrong choice, dealing with different suppliers, and securing quotes. Frustration arose from misaligned expectations or lack of clarity in communication.	**Relief and anticipation** – crossing the line and committing financially brings excitement but also nerves about what lays ahead, potential risks of installation outcomes.	**Hopeful but nervous** – installation day is exciting as they progress towards their goals, but disruptions or poor communication can cause frustration.	**Learning curve** – satisfaction from tracking solar performance, but frustration from unexpected billing surprises or technical issues requiring follow up.	**Confidence and advocacy** – most homeowners believe they made the right choice especially when reinforced by clear financial benefits. Happy customers often encouraged others to adopt solar.



Moments that matter	Casual interest, passive exposure	Something shifts – rising power bills, climate concerns, or home upgrades push solar into consideration	Broad information gathering, learning how solar works and if it's feasible	Comparing suppliers, financing options, system sizes, getting quotes.	Weighing up which supplier to trust, accepting a formal quote, engaging the chosen supplier.	Finalising financial decisions, signing agreements	The panels go up, expectations meet reality	Navigating the first months, monitoring performance, and shifting energy habits	Looking back, most homeowners wish they had done it sooner
	The first spark – hearing about solar from friends, social media, or news makes it feel like an option worth considering.	**The trigger** – a noticeable event (high power bill, home renovation, or climate motivation) prompts active research.	**The first cost reality check** – realizing that solar is an investment, not a cheap quick fix.	**Financial clarity** – understanding financing options (loans, PPAs, payback periods) shapes the decision to proceed.	**Supplier trust** – the reassurance (or doubt) from interactions with suppliers significantly impacts confidence in moving forward.	**Crossing the line** – making the first payment or securing a loan turns the decision from concept to reality.	**The install experience** – a seamless, professional install reassures consumers, while delays or poor communication create frustration.	**The first bill with solar** – seeing actual savings (or unexpected costs) shapes early confidence in the system.	**Advocacy in action** – talking to others about their experience reinforces the value of solar and encourages new adopters.

Residential Solar Research Customer Journey

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	Before consumers begin	**Discovery, learning and evaluating**			**Locking it in and execution**			**Post-install, living life with solar**	
Tensions & barriers	Low motivation to verify info means misinformation goes unchecked. Misinformation is pervasive and sticky, creating distorted perceptions. Highly inconsistent baseline knowledge – no shared starting point.	Unclear entry point to researching – people don't know what the first step should be. Lack of curated information means they can hit a wall quickly. Uncertainty discourages further exploration, despite high interest.	Too much noise – high volume of sources, sometimes conflicting or outdated, leads to overload. Effort intensive. No single source of truth means validating and corroborating info is hard. Generic or international content skews expectations. Many consumers don't know when they've done 'enough' research. Information can become very technical – overwhelms those not confident.	Consumers often don't know what criteria to assess. No clarity on trade-offs (e.g. micro-inverters vs strings, battery now or later). Financing options (e.g. green loans, council loans) is often late in the process – not part of early discovery. Realisation their expectation of cost is misaligned to reality – this is confronting and demotivating. Trust gaps – suppliers can be seen as sales-driven. Other competing financial priorities or wants. Constant backtracking due to gaps in knowledge. Trial-and-error learning leads to inefficiency and fatigue.	Quotes often look the same (cost, inclusions), making differentiation hard. Subjective criteria (e.g. service quality) are hard to assess. "Sales mode" responsiveness drops after deposit. Supplier communications vary or be inconsistent.	A sense of being in uncharted territory – "am I the only one doing this?" Few reference points or peers to validate experience against. Post-payment "fog" – unclear what's next or how long things will take. Drop in communication once contract is signed. Uncertainty about normal delays (e.g. waiting on stock, inspections). Disjointed handoffs between sales, logistics, and installers. Installer professionalism varies, and consumers don't know what good looks like.		Initial performance can underwhelm – expectations misaligned. Export rates are lower than expected. Poor aftercare or zero follow-up from some suppliers. Maintenance responsibilities unclear – e.g. who cleans panels, what if something breaks? "Set and forget" assumptions break down – leads to confusion. Changes made to their lifestyle behaviours/ habits (e.g. setting appliances to operate in the day) can be disruptive.	Advocacy is self-driven – no structured way to share their story. Still feel like the minority – limited social proof or cultural norming. No clear platform or pathway to guide others through the journey. Uncertainty about their own expertise, despite living the experience
Needs	Basic, credible understanding of solar energy and how solar works (in plain terms). Reassurance that solar is viable in NZ (especially in cloudy regions). Trusted myth-busting (e.g. battery requirements, off-grid assumptions).	Simple, step-by-step overview of the journey – 'first steps guide'. Practical and relatable examples relevant to their type of home or lifestyle ('Could this work for me? My home?'). Case studies of solar experiences for different types of consumers (e.g. retirees, young families, renewable energy nerd). Reassurance that it's normal to not know where to start.	NZ-specific, up-to-date, trustworthy information. Clarification of local policies, products, pricing, and financing options. Practical tools or resources to estimate cost, fit, and benefits based on personal circumstances. Centralised comparison resource or portal of panels, batteries, suppliers.	Clear evaluation framework (what to compare, how to assess). Decision-making tools or checklists. Scenario-based info tailored to home types or energy usage. Local, unbiased, and tailored information = independent reviews or third-party guidance. Clarity on finance options (esp. green loans, PPA, bank offers). PPA misunderstandings – confusion with ownership and resale implications.	Clarity on how to evaluate suppliers beyond just cost. Expectations and transparency on what's included in quotes and the consultation processes. Supplier differentiation: what's included, who does what, aftercare offered. Expectations on how good suppliers should engage.	What happens between deposit and install: timeline, responsibilities, points of contact. What to expect from install day to system switch-on. Assurance around council consents, delays, and inspection timing. Guidance on what is "normal" and when to follow up		Understanding how to monitor, optimise and maintain the system (ongoing requirements). Billing explanations and export power limits. What to expect and common reasons for lower than expected power (plus trouble-shooting) Common experiences you might encounter 1-3 months, 3-6 months, 6-12 months, 12+ months. Advice on energy use habits (timers, appliance use, battery integration). Guidance on switching energy providers.	Platforms or forums to share experience and stories. Ways to share their experience meaningfully. Resources to help them advocate confidently and accurately. Resources to help educate others (fact-based and engaging). Recognition or reinforcement of their effort and success. Social validation for having made the leap.
Information and channels	Word-of-mouth (friends, family, neighbours), sustainability news, general media coverage, social media.	Online searches ("Is solar worth it?"), supplier websites, sustainability blogs, YouTube explainer videos, suppliers at home shows, suppliers that door knock.	Online – Google – direct to solar companies, 3rd party websites (EECA /Genless, local council, Consumer NZ report, Homes.co.nz) solar comparison tools (mysolarquotes.co.nz) Power companies, International sites (Australian and US for tech and innovation) Reviews, testimonials, Social media (Facebook, Reddit, solar community forums) Offline - Word-of mouth (friends, family, neighbours) Tradespeople recs.	Supplier consultations, Facebook solar groups, discussions with banks about financing, product reviews on solar panels, inverters and battery. Direct engagement with suppliers, gathering multiple quotes, discussions with installers, peer recommendations from other solar users.	Information packs on the product(s) chosen and sometimes the installation process from the chosen supplier.	Personal finance calculations spreadsheets, loan/bank approval process, supplier contracts, checking installation timelines, reading terms and conditions.	Real-time updates from the installer, supplier guidance on system activation, monitoring app tutorials.	Solar monitoring apps, user forums ("Why is my solar not exporting?"), checking buy-back rates with electricity providers.	Personal recommendations to friends, social media, forums sharing of solar savings.