



E Source

US Regional AC Penetration



Pacific

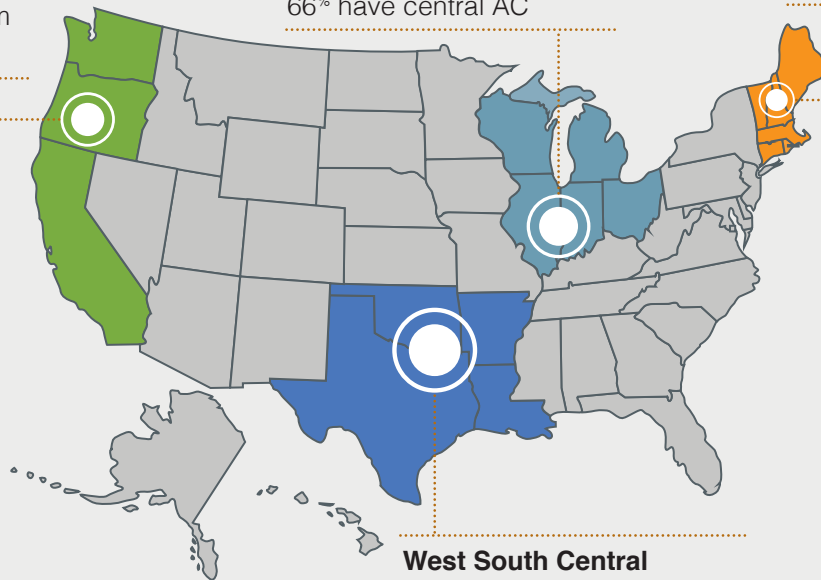
19% have no cooling system
45% have central AC

East North Central

4% have no cooling system
66% have central AC

New England

10% have no cooling system
33% have central AC



West South Central

<1% have no cooling system
80% have central AC



If you think about it, this makes sense, right? A higher proportion of residential customers living in geographic areas that are hotter and more humid report having central air-conditioning (AC) systems than those living in cooler areas.

But here's what you might not realize.



34%	38%	Have central AC but have never replaced their cooling system
▶ OF THOSE...		
30%	32%	Have a high-efficiency central AC system
43%	42%	Have a normal or base-efficiency system
▶ BUT IN THE PAST 12 MONTHS, ONLY...		
2%	5%	Have participated in an equipment rebate program
5%	7%	Have had an HVAC inspection or maintenance



This tells us that there are **numerous opportunities for utilities**—particularly those in the West South Central region, but also in Pacific states—to engage with customers through HVAC inspection and maintenance services and equipment rebate programs. Customers who have never replaced their central AC systems and have normal or base efficiency-level models are especially low-hanging fruit.

The data are drawn from The Nielsen Company's Energy Behavior Track, an annual online survey conducted in partnership with E Source, which gathers information from approximately 32,000 residential customers in the US on a variety of energy-related topics. The E Source Residential Customer Insights Center compiles the data and layers it with demographic and household characteristics. The data are available for the entire US and can be sorted by Census Region, state, and major utility operating company.