

## EndCustomer Monitor 9.0

The German PV Market from an End Customer Perspective

Focus: Digitalization and post EEG

A Survey of 1.785 German PV Owners and Planners

EuPD Research | Multi Client | July 2019

# Background

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## EndCustomer Monitor 9.0 – The German PV Market from an End Customer Perspective Focus: Digitalization and post EEG

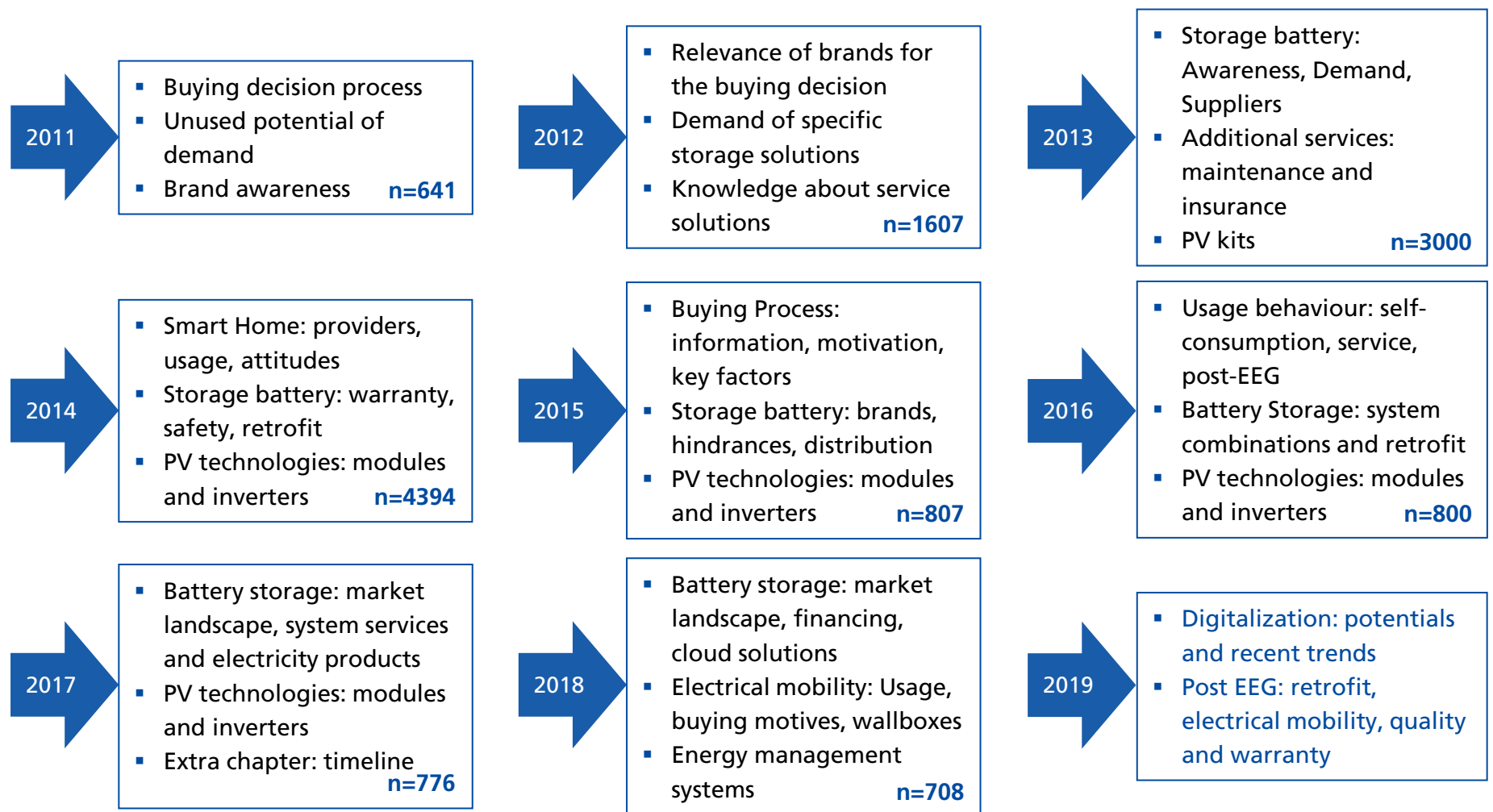
For the ninth consecutive year EuPD Research surveyed German PV end customers on the topics of PV technology, brand landscape and storage. The classical topics brand awareness, brand choice and recommendation are once again core parts of the study. Moreover, the focus of this edition is on digitalization and post EEG.

The part on digitalization focusses on potentials. It is enhanced by questions regarding smart meter and system monitoring, among other things, in order to outline the end customer's views toward these recent trends.

The part on post EEG concentrates on owners of older PV systems. Questions about topics such as retrofit, electrical mobility or quality and warranty claims will show how end customers might react to the expiry of the EEG feed-in tariff.

The study provides comprehensive insights into the German PV and storage market and into the buying process. It provides valuable assistance in order to adapt your business strategy and your product portfolio.

# Overview of the contents



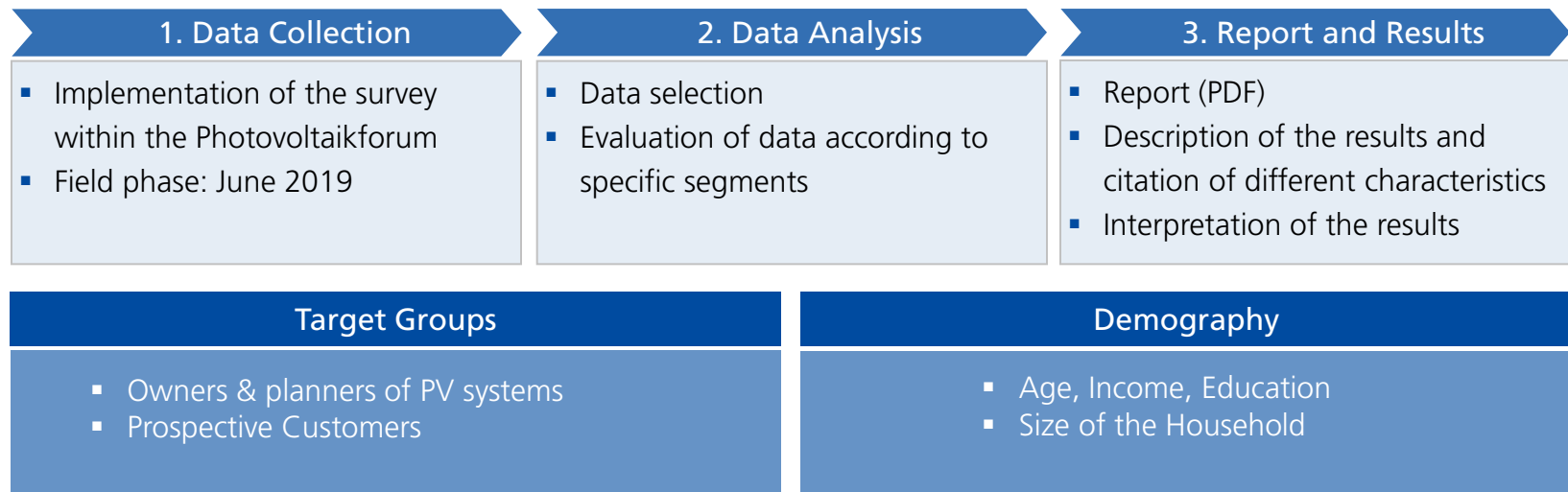
# Approach

## Methodology

The information on customers was collected on the basis of a quantitative online survey placed in the Photovoltaikforum. The Photovoltaikforum (<https://www.photovoltaikforum.com>) is a known homepage for the exchange between suppliers, distributors and especially end customers. The online survey guarantees an objective, flexible and cost-effective approach. Both open and closed questions are posed.

## Target Groups

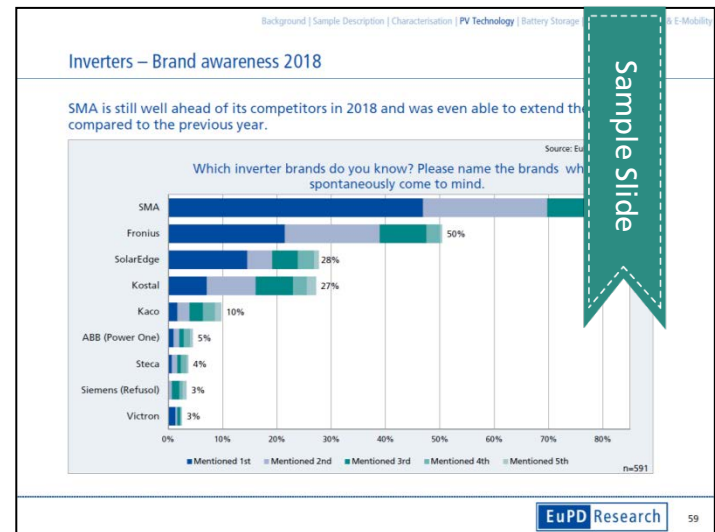
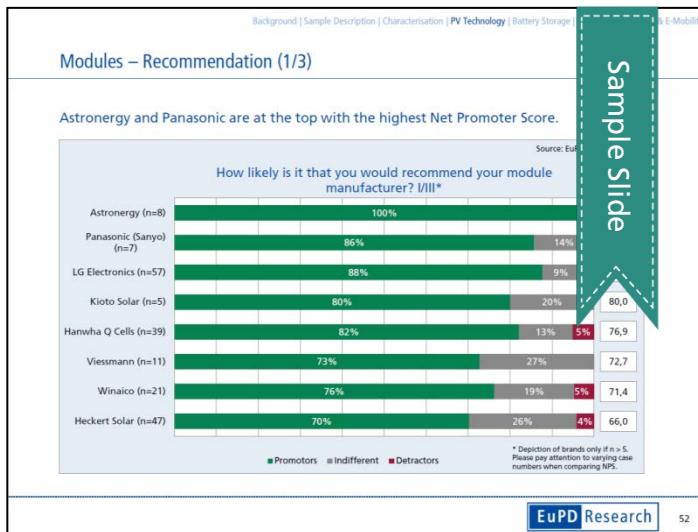
The Photovoltaikforum is meant to foster the exchange between all players along the value chain. This survey has targeted the buyers of PV systems, mostly house owners, in Germany. A differentiation between owners and planners can be drawn, as well as a differentiation based on demographics.



# Sample Slides

## Key questions of the EndCustomer Monitor 9.0 are:

- What are key factors that influence the buying behavior regarding modules, inverters and storage systems?
- How aware are PV customers of different PV technology brands?
- How satisfied are customers with their PV technology?
- What are PV owners planning to do with their power plant after they receive no more Feed-In-Tariff? How immanent is this scenario for them already?
- Which shape does the transition from pure grid export to the prosumer take?
- How important is it to prosumers to maximize self consumption and what do they do for it?



# Benefits for your Company

## EndCustomer Monitor 9.0 – The German PV Market from an End Customer Perspective Focus: Digitalization and post EEG

Provide your company with decisive competitive advantages:

- PDF report including graphs and annotations
- Optional: on-site presentation / online

Selected benefits of the survey:

- Get detailed information on the end customer decision making process.
- Know which brands the end customers in the PV market favor.
- Gain insights into the brand awareness of PV and storage solutions.
- Identify motivations and barriers for purchasing PV and storage solutions.
- Find out about how end customers are aware of the end of the FiT.



# Order Form

I would like to order the herein before mentioned study (please mark):

- EndCustomer Monitor 9.0 EUR 4.250\*  
Focus: Digitalization and post EEG

*(Format: PDF-report, Language: German or English, approx. 120 slides)*

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Optional and only as an addition to the EndCustomer Monitor 9.0 PDF-report:

- EndCustomer Monitor 8.0 EUR 1.940\*  
*Focus Energy Storage Services and Electrical Mobility*
- Result presentation (via  TeamViewer) EUR 350\*
- On-site presentation EUR 880\*

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Payment conditions: 100% due after order  
\* Prices without VAT and travel expenses

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Mail to the attention of Saif Islam: s.islam@eupd-research.com

Name: \_\_\_\_\_

Fax: \_\_\_\_\_

Company: \_\_\_\_\_

Email: \_\_\_\_\_

Street: \_\_\_\_\_

Sales Tax ID: \_\_\_\_\_

City & ZIP: \_\_\_\_\_

I accept the terms and conditions of business.

Telephone: \_\_\_\_\_

Signature: \_\_\_\_\_

About Us



# EuPD Research: The B2B Specialist for International Market Research



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## Exclusive Services

- Customer Satisfaction
- Market Analyses
- Storage Workshops



## PV-Reports

- EndCustomer Monitor
- Global PV Installer Monitor
- PV Community and Cloud Analysis



## Certifications

- Customer Satisfaction Seal
- Top PV Supplier
- Top Brand PV



## EuPD Research: References (Extract)



# General Terms and Conditions of Business I

## 1. Scope

1.1 All contracts between EuPD Research Sustainable Management GmbH (hereafter EuPD GmbH) - and the customer shall be subject to the following terms and conditions only. The customer's terms and conditions of business shall not be applicable and shall not put EuPD GmbH under any obligation to comply unless EuPD GmbH explicitly gives written acknowledgment and acceptance of such conditions.

1.2 Offers are aimed exclusively at commercial clients, that is, companies according to Article 14 BGB (German Civil Code). Private customers, that is, customers according to Article 13 BGB, are not permitted to place legally binding orders based on the aforementioned. Interested private customers should contact EuPD Research by telephone for information on how to place a non-commercial order. Furthermore, the legal right to return items as stated in consumer protection law does not apply to orders placed by commercial clients but does apply to orders placed by private customers.

## 2. Offer and Ordering Process

2.1 The presentation of the products together with the order form does not constitute a legally binding offer. Offers are subject to the written confirmation of EuPD GmbH. They are designated for the internal use of the customer only.

2.2 The purchaser places a binding offer for the product of choice when all relevant purchase details have been given and the general terms and conditions of business accepted. This will be confirmed immediately by email or fax sent to the address given by the customer. The contract to purchase between the purchaser and EuPD GmbH is valid from when the order is confirmed, or, the products are delivered either by mail or download.

## 3. Scope of Services, Remuneration and Prices

3.1 Services offered include but are not limited to the following:

a. Multi-Client-Services: client-independent studies for an indefinite number of customers.

b. Shared-Services: commissioned study on behalf of a limited number of customers for the exclusive purchase of those customers.

c. Exclusive-Services: assignments carried out on behalf of a single customer who will have the exclusive license to use the product but only for an individually negotiated period of time. This exclusive license will be for a period no longer than 12 months. After a period of no longer than 12 months it will become a non-exclusive license.

3.2 The prices are net prices in Euros. They do not include sales tax/VAT or delivery costs. Sales tax/VAT will be added to the net costs according to the legally defined percentage. The prices valid at the time of ordering are binding.

3.3 Travel expenses incurred for EuPD GmbH workshops either provided in combination with studies or booked separately are not included in the scope of the offer. Prices have to be paid separately by the customer. This does not apply if it is explicitly agreed that the workshop or the resulting travel expenses for the workshop are part of the negotiated contract and thus do not have to be paid separately.

3.4 Should circumstances arise beyond the control of EuPD GmbH which impose a temporary hindrance on the provision of services, then services and delivery appointments agreed on will be extended. Customers will be informed of any such event or other delay immediately.

## 4. Terms of Payment and Delivery

4.1 Payment is to be made to the amount and method stated in the contract. Any addition and/ or aberration require the written confirmation of EuPD GmbH in order to be effective.

4.2 Payment is generally to be made upon receipt of invoice. The products will be shipped as soon as full payment has been made to the account of EuPD GmbH. The terms and conditions for payment and delivery of Shared-Services and Exclusive-Services are stipulated in the binding offer.

4.3 Delivery costs depend on the quantity of products ordered, their destination as well as type of delivery. There are no delivery costs for products which can be downloaded. The customer accepts that any fees or charges owed for customs or non-EU addresses will not be paid by EuPD GmbH nor is EuPD GmbH liable for them.

4.4 The method of delivery, route and company employed to deliver will be chosen by EuPD GmbH at their sole discretion. Once the purchaser has taken delivery of the item from the delivery service, the purchaser is responsible for the item. The company responsible for delivery is to be made aware of any damage sustained in transit immediately. These damages are also to be reported to EuPD GmbH immediately. Part deliveries are permissible where appropriate.

# General Terms and Conditions of Business II

4.5 EuPD GmbH retains ownership of all goods and all licensing rights pertaining to the usage of data files as well as intellectual property until payment of invoice has been made in full. Intellectual property rights are lawfully retained by the author.

4.6 The purchaser is only able to offset counter claims if they are acknowledged by law, uncontested, or prior written consent has been granted by EuPD GmbH. Customers are only have the right of retention if counterclaims are based on the same contractual relationship. The customer is prohibited from transferring any claims of payment against EuPD GmbH to a third party.

4.7 The estimated costs for the services provided by EuPD Research are based on project calculations and experience. Estimations are optimized and customer-oriented so that lower deviations may not be assumed.

However, it cannot be fully excluded that additional effort maybe required in the completion phase of the project. Should the suggested amount be exceeded, EuPD Research will inform the client promptly. Such additional efforts will be calculated on the basis of man-day costs and these may vary according to the qualification of the staff involved.

Upon notification of these additional costs the client may choose whether the project shall continue in accordance with the original cost estimation as stated in the proposal although full completion of the project may no longer be possible or agree to the revised cost estimation thus enabling full completion of the project. Should the client agree to the latter, this shall be subject to a separate written agreement.

## 5. Copyright and Licenses

5.1 The products and their intellectual property are protected by copyright. It is only possible to purchase a license to use the product and not the product itself or its content. The author/ creator remains the owner of intellectual property.

5.2 The customer is granted a non-transferable and non-exclusive license to use the product and the results and content in the product (with the exception of Exclusive-Services) for personal use respectively for use within the company that placed the order.

5.4 Permission to use the licensed product in the national and international affiliates of the company is subject to the written approval of EuPD GmbH.

5.5 Any use of the product not explicitly permitted under copyright law is prohibited without the prior written consent of EuPD GmbH as the licensor and/or the written consent of the author. This includes but is not limited to copying, distributing, publishing, translating, saving, processing and reproducing the work in databases. Non-compliance will be prosecuted

## 6. Liability

6.1 The products were prepared with the utmost care, using professional methodologies and taking relevant legislation into account with the aim of assuring the best possible accuracy of the studies and their results. The data contained in this product is based on surveys of sample populations, conducted using standard statistical methods to the best of our knowledge. As such the study is subject to a certain statistical error rate and is based exclusively on the facts which were available at the time of the survey. Due to the aforementioned, no guarantee can be given for the accuracy and completeness of the studies and the data made available in them.

6.2 The studies contain specific information, but explicitly do not contain any definite recommendations on investments or actions to be taken. Should the user, having taken the above mentioned into consideration, choose to use the studies to support their decision making process, EuPD GmbH shall not assume liability for the economic success of such investments or actions.

## 7. Jurisdiction

The court of jurisdiction is Bonn. German law will be applied in all legal proceedings.

## 8. Severability Clause

Should any of these terms and conditions, either in full or in part, be invalid or incomplete, it shall not affect the validity of the other terms and conditions. In that case, the terms and conditions, as stated in German law come into effect.

As of August 2013

# Editorial

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