



# PV InstallerMonitor<sup>©</sup> 2022/2023

Understanding the installers' view of the PV rooftop market

Primary Survey of PV Installers in Australia, Austria & Switzerland,  
Belgium, France, Germany, Italy, Netherlands, Poland, Spain &  
Portugal, Sweden & Denmark and UK

EUPD Research | June 2023



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# BENEFITS OF THE PV InstallerMonitor© 2022/2023

## Utilize the Report to:

Measure the success of  
your marketing activities  
within the target group  
of the installers

Benchmark your results  
with your competitors

Receive feedback  
about your brand  
from the installers

Understand where  
your competitors  
score and where  
your opportunities

Develop an  
understanding as to  
which products and  
services will be in  
demand tomorrow



Optimize the  
allocation of  
your marketing  
budget



Improve your  
position  
amongst the  
competition



Implement a  
successful  
product  
development



Understand the  
needs and  
demands of the  
installers



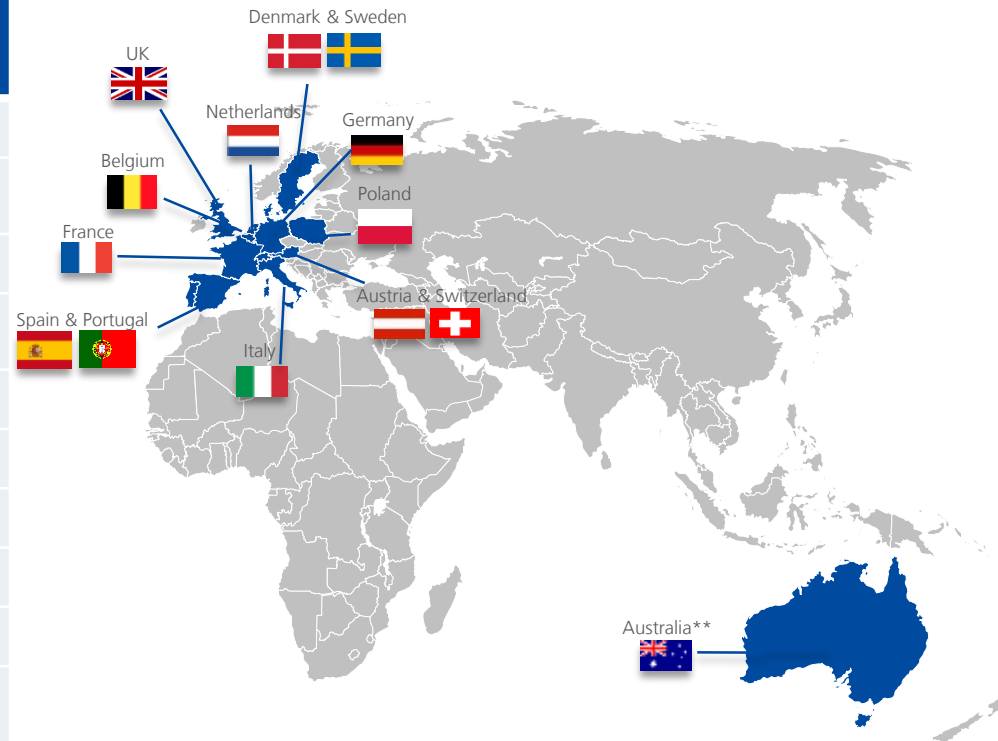
Adjust your  
portfolio to the  
installer's  
requirements

## Content of the PV InstallerMonitor

# PV InstallerMonitor© 2022/2023

The PV InstallerMonitor© 2022/2023 results can be chosen from the following country markets:

Country	No. of interviews*
Australia	n=250
Austria & Switzerland	n=135
Belgium	n=100
France	n=100
Germany	n=300
Italy	n=100
Netherlands	n=150
Poland	n=100
Spain & Portugal	n=130
Sweden & Denmark	n=100
UK	n=100



## OPPORTUNITIES & CHALLENGES

Markets with a large rooftop segment offer a constant investment environment and favorable margins. However, all markets are structured differently.

To be successful, you need to understand the key intermediaries in the different markets.

\* The target markets differ with regard to market maturity and installer's landscape and therefore the number of interviews cannot be guaranteed.



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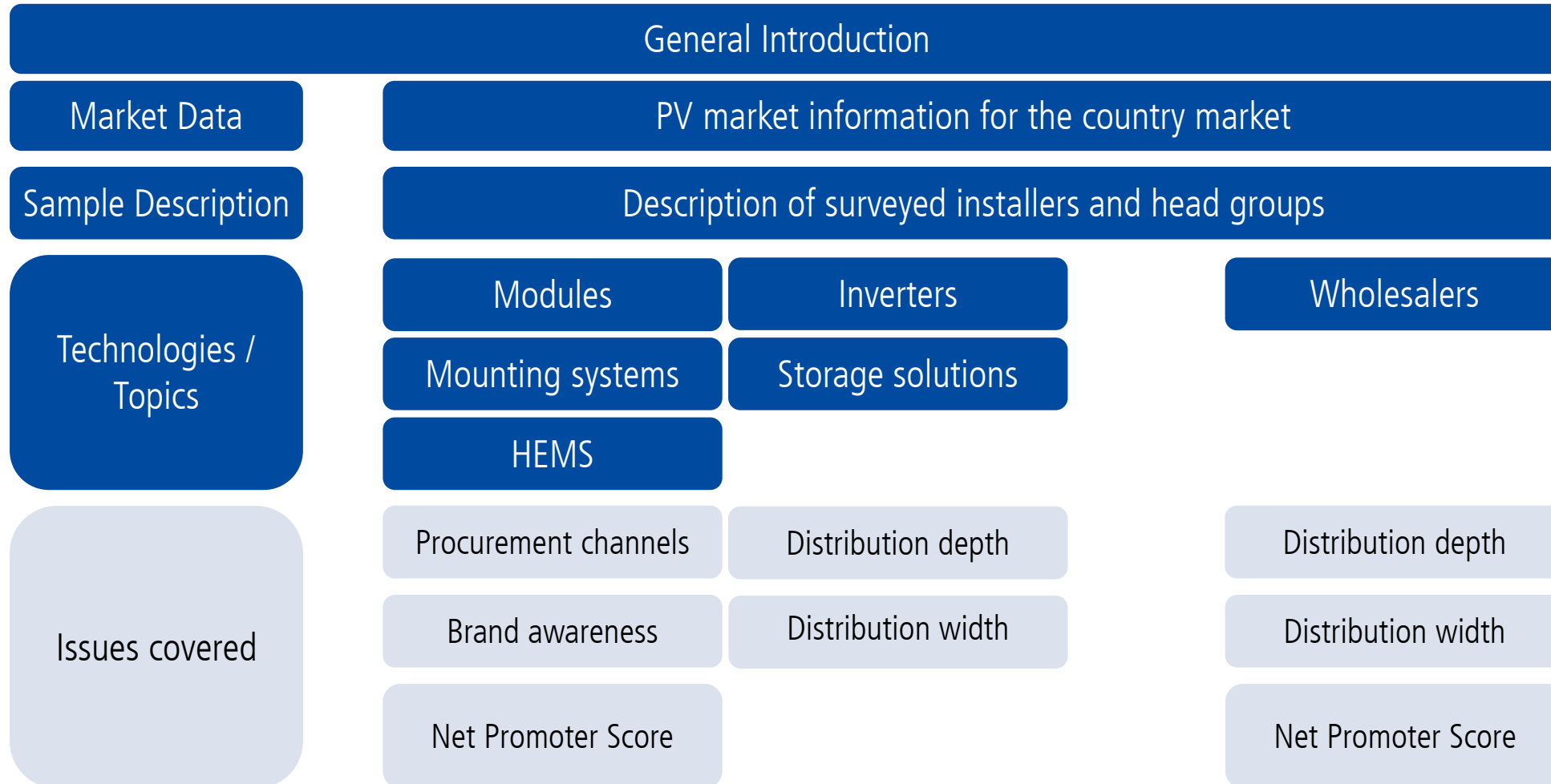
## The Content

- **General Introduction**
- **Market Data:**  
PV market information for the country market
- **Sample Description:**  
Description of surveyed installers and head groups
- **Modules:**  
Procurement, brand awareness, avoided brands, market penetration, duration of brands in portfolio, Net Promoter Score, delivery times
- **Inverters:**  
Procurement, brand awareness, market penetration, Net Promoter Score
- **Mounting system manufacturers:**  
Procurement, brand awareness, market penetration, Net Promoter Score
- **Wholesalers:**  
Procurement channels for PV components, positioning of wholesalers, Net Promoter Score
- **Storage Solutions:**  
Procurement, brand awareness, avoided brands, market penetration, duration of brands in portfolio, Net Promoter Score, delivery times
- **HEMS:**  
Brand awareness, market penetration, Net Promoter Score



# PV InstallerMonitor© 2022/2023

## The Content



# PV InstallerMonitor© 2022/2023



New this year

- Home Energy Management Systems: Find out which brands are known and offered, and which brands the installers would recommend the most.
- Find out how long installers hold on to their module- and storage brands, if they carry them for many years or handle their portfolio dynamically.
- Are installers open towards new brands or rather use trusted ones?
- How long are delivery times in these times of high demand and low component availability?



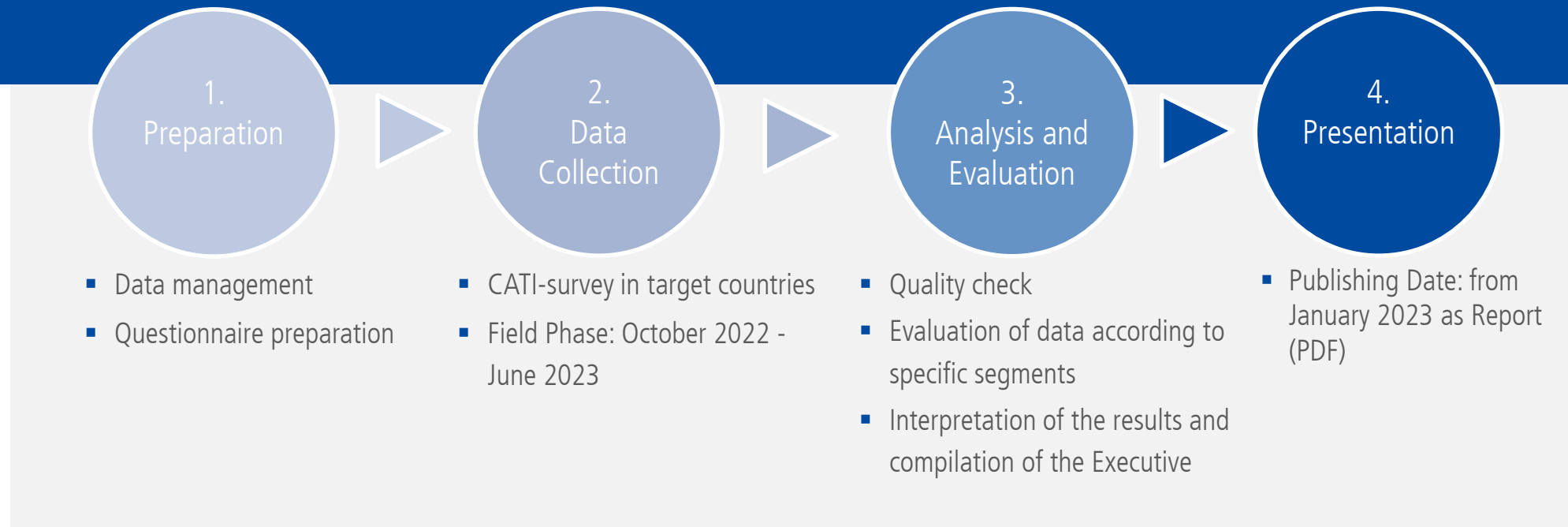
## Methodology of the PV InstallerMonitor



# METHODOLOGY OF THE PV InstallerMonitor© 2022/2023

The study is based on an *empirical survey* (primary research). The survey employs a *quantitative telephone questionnaire (CATI)*, the in-depth interviews are carried out by multilingual interviewers. The results of the study are analyzed anonymously in line with the requirements of modern market research.

Also, *secondary research* will be involved in the analysis: Through desk research and the use of internally available data, the information provided by the installers is enriched with figures about market development.



# THE SAMPLE

## PV InstallerMonitor© 2022/2023

The target group is made up of installation companies who install PV systems.

This group can include:

- Pure solar installers
- HVAC companies
- Construction companies
- Electricians
- Roofers

The selection of the sample is drawn from EUPD Research's extensive address database of PV installers. This database is constantly refreshed and updated.

Only installers who have installed rooftop PV systems in 2022 in their domestic country market are considered for the survey.



Example slides of the PV InstallerMonitor

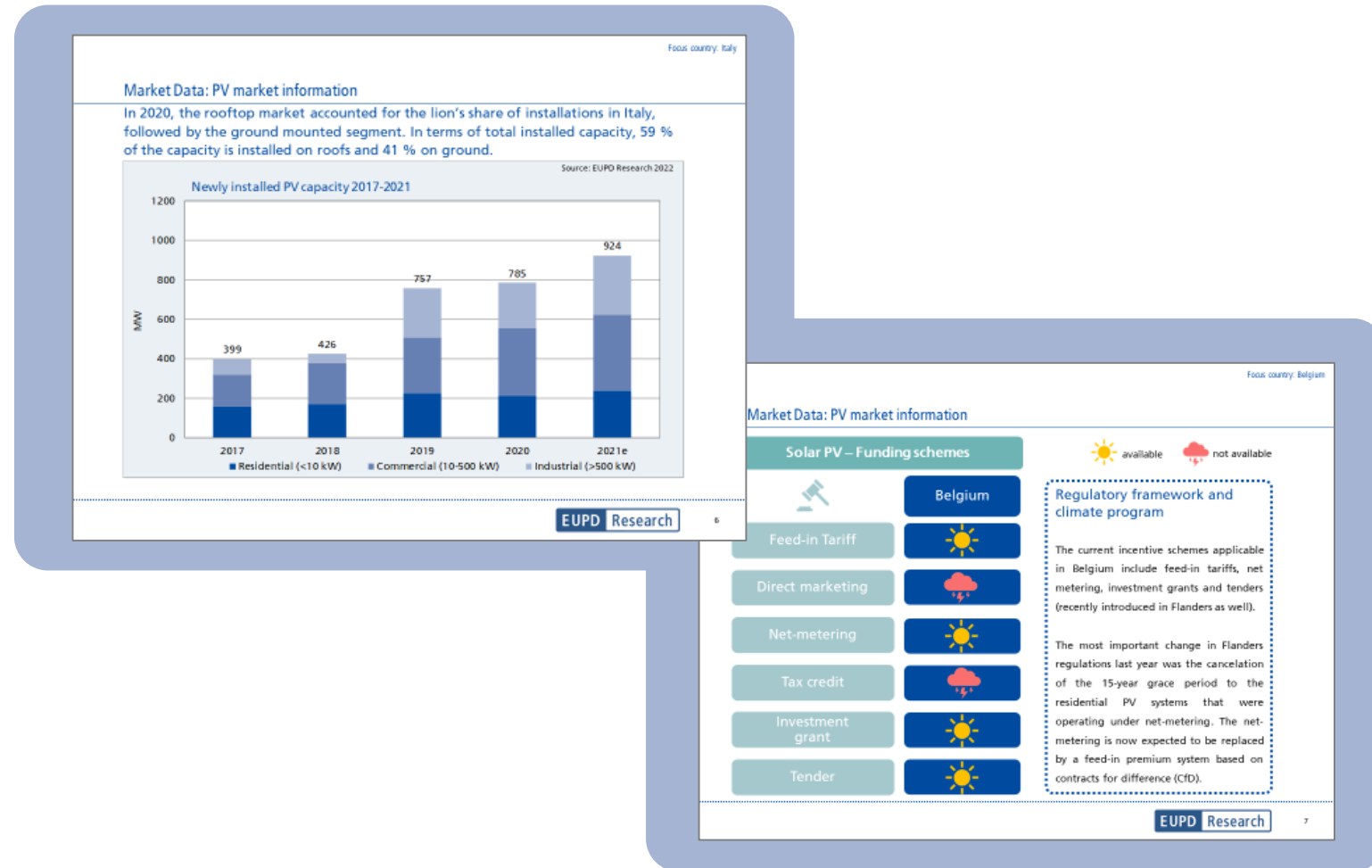
# PV InstallerMonitor© 2022/2023

## COMPACT UPDATE OF THE PV MARKET

Retrace the cumulated and installed capacity in the relevant segments.

Understand the main funding schemes.

Use the key market data for your planning.



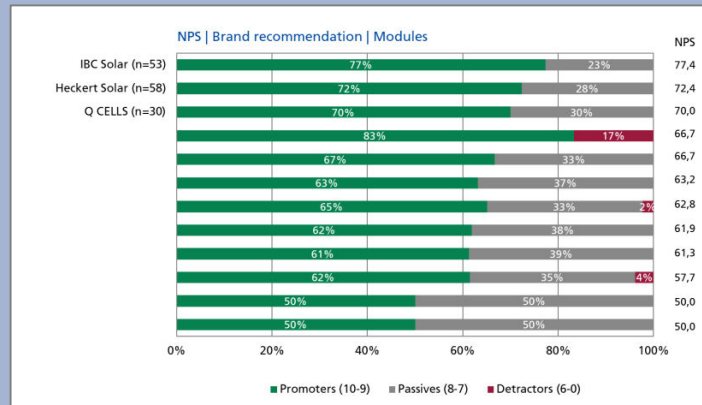
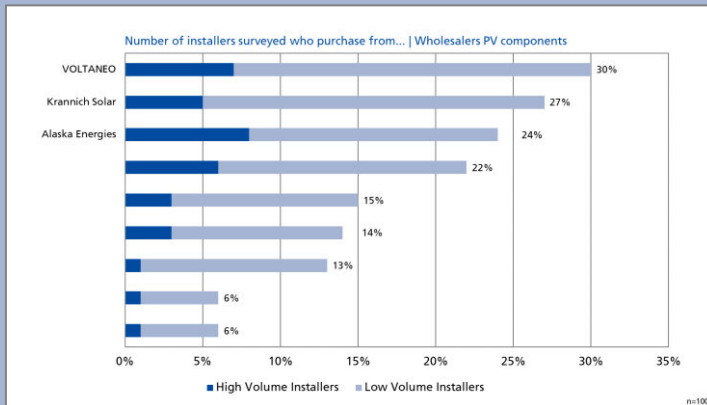
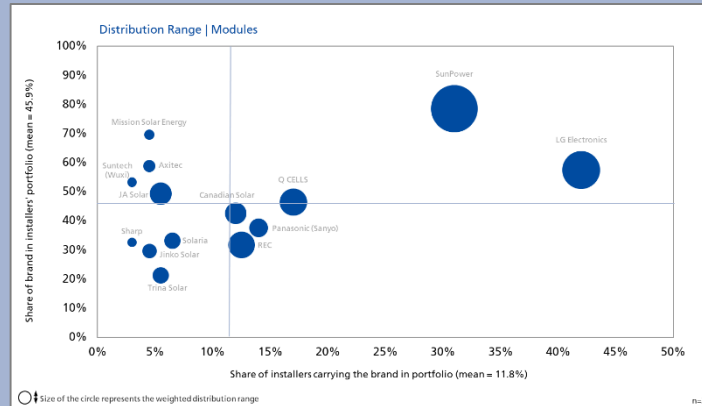
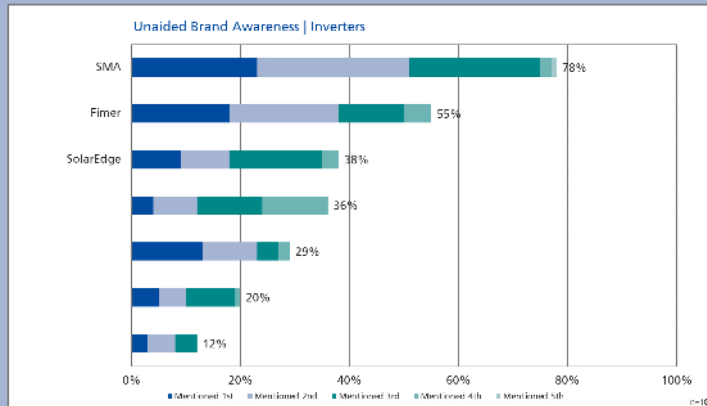
CHECK THE **KPI'S** REGARDING:

Unaided  
Brand  
Awareness

Net Promoter  
Score

Distribution  
Width

Distribution  
Depth





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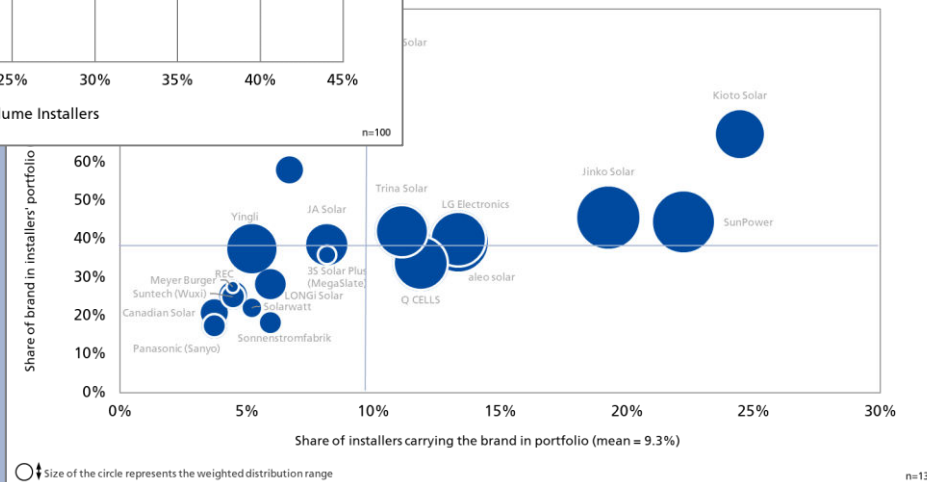
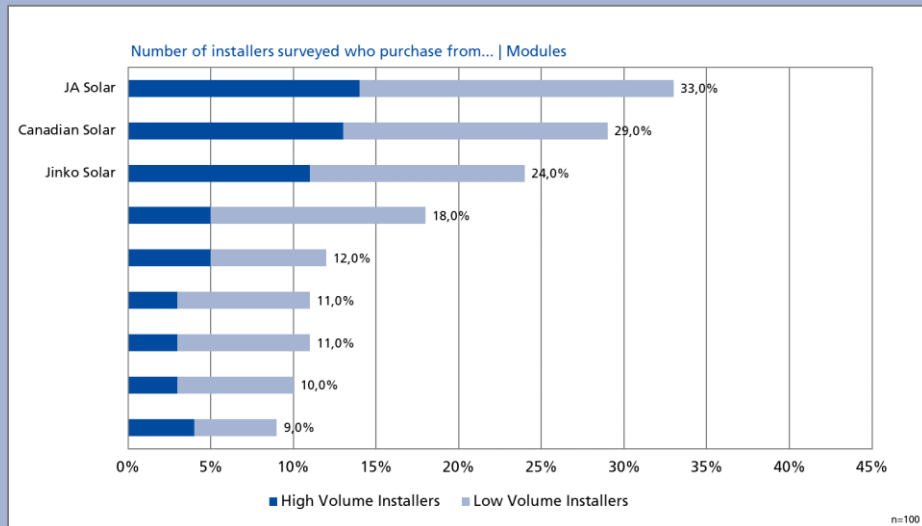
## THE POSITIONING IN THE INSTALLERS' PORTFOLIOS IS CRUCIAL

Measure the percentage of installers that buy your products and solutions.

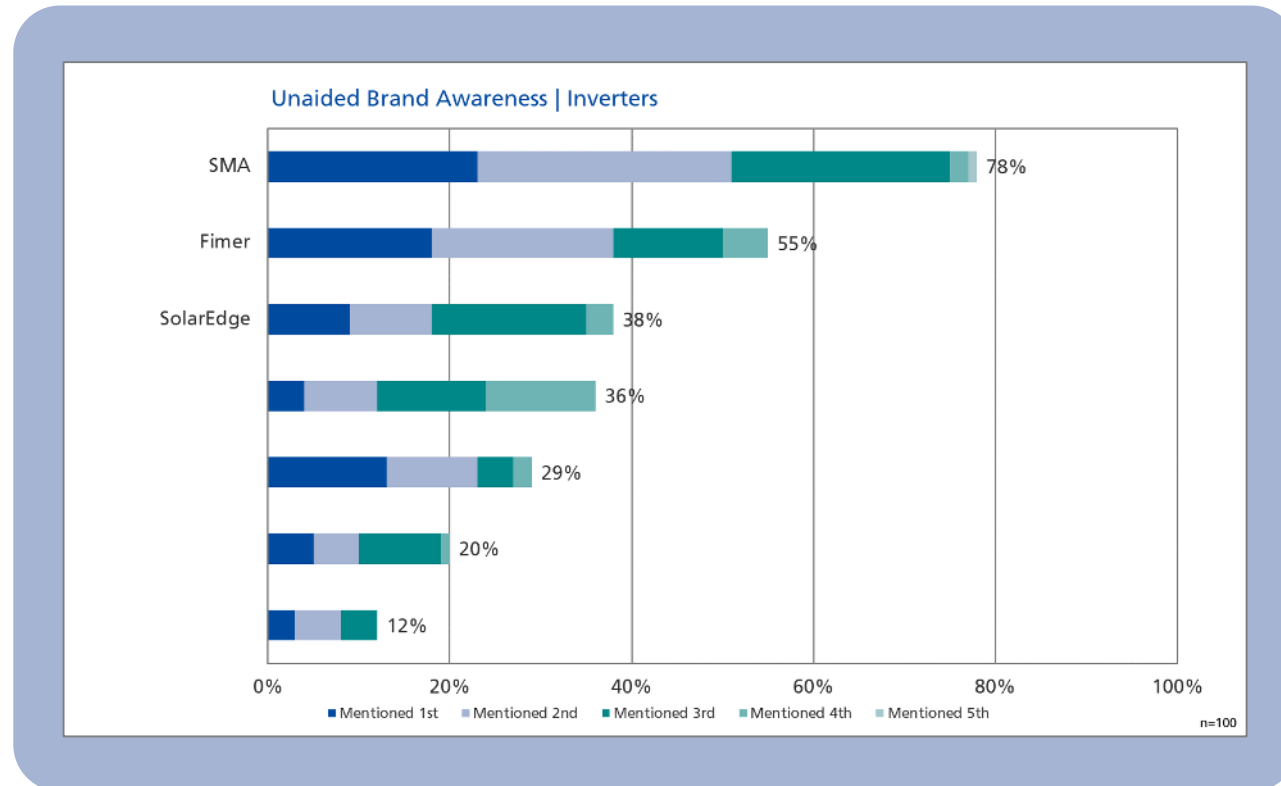
Analyze how exclusive your brand is positioned in the installers' portfolios.

Clarify if you are first choice or a replaceable space-filler.

Track the way and development from a rarely bought niche product to a frequently requested exclusive star.



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## BRAND POWER IS THE INITIAL FORCE

Monitor the perception of your brand via the measured unaided brand awareness.

Check which brands come to installers' minds first and which later on.

Find out which brands are avoided by installers.

Use these indicators to measure your sales-, marketing- and communication activities.

# PV InstallerMonitor© 2022/2023

## RECOMMENDATION IS KEY




Benchmark your company against your main competitors.

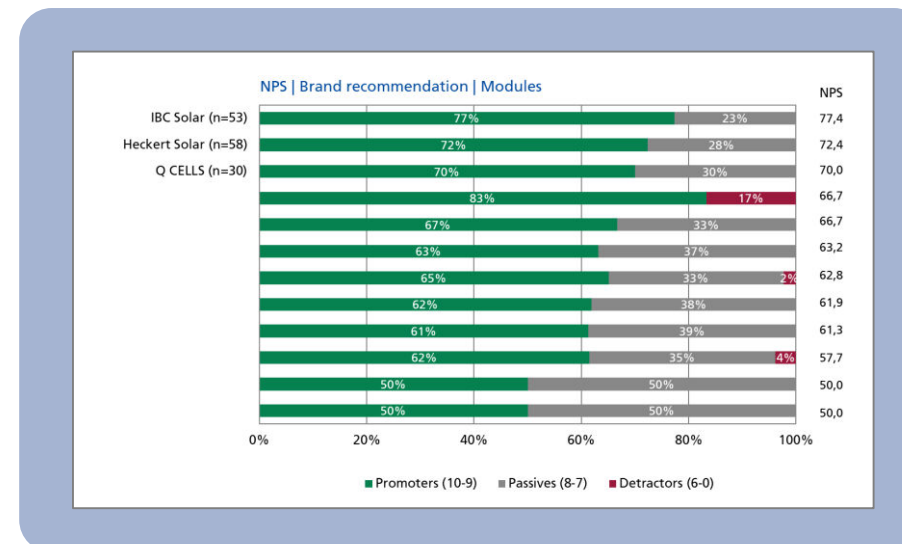
Identify potential for improvements.

Communicate your success based on valid stats and figures.

Count your promoters and deduct the customers that are critical.

How likely would you recommend the following brand(s)?  
Please decide on a scale from 10 = „highly likely“ to 0 = „not likely at all“

Promoters	Passives	Detractors
		
10 9	8 7	6 5 4 3 2 1 0
% Promoters	—	% Detractors
= NPS		



# PV InstallerMonitor© 2022/2023

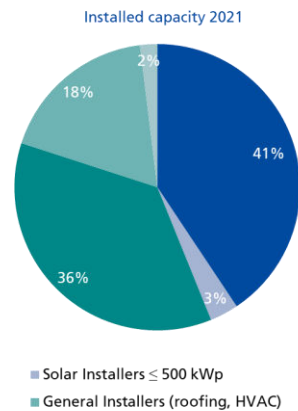
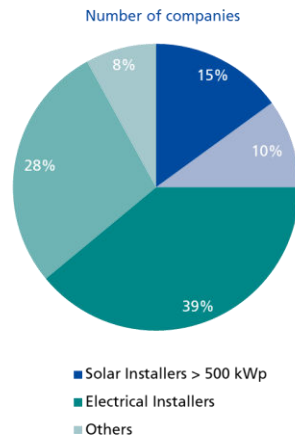
## EXPAND INTO NEW INSTALLERS' PORTFOLIOS

Get to know the installers, learn how their companies are characterized and in which sectors they are active in.

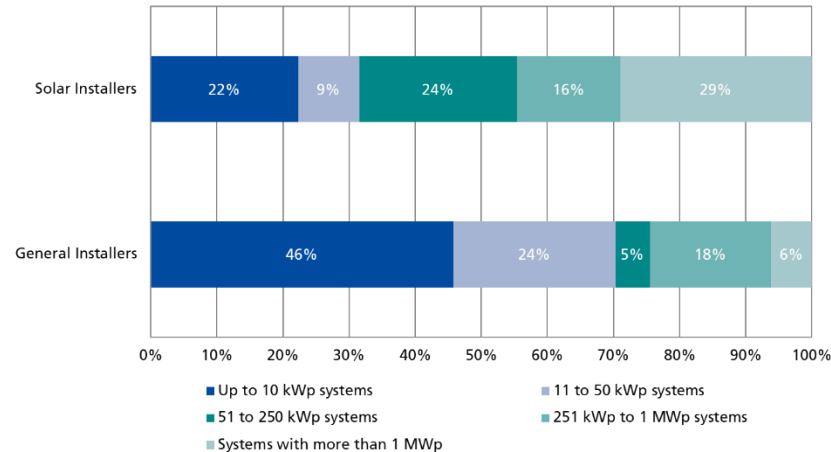
Find out in which markets installers are open to add a new brand to their portfolio and in which country markets it is harder for new brands to be accepted.

Compare for how long installers have carried certain brands in their portfolio.

Sample description | Trade



Sample description | Segmental focus



Receive your issue of the PV InstallerMonitor 2022/2023



# ORDER FORM

## PV InstallerMonitor© 2022/2023

### COUNTRY MARKET PDF-REPORTS \*

	Interviews	Regular Price
<input type="checkbox"/> Australia	n=250	6,450 €
<input type="checkbox"/> Austria & Switzerland	n=135	5,250 €
<input type="checkbox"/> Belgium	n=100	4,950 €
<input type="checkbox"/> France	n=100	5,500 €
<input type="checkbox"/> Germany	n=300	6,800 €
<input type="checkbox"/> Italy	n=100	4,950 €
<input type="checkbox"/> Netherlands	n=150	5,500 €
<input type="checkbox"/> Poland	n=100	4,950 €
<input type="checkbox"/> Spain & Portugal	n=130	5,200 €
<input type="checkbox"/> Sweden & Denmark	n=100	4,950 €
<input type="checkbox"/> UK	n=100	4,950 €

\* Please note: All prices excluding VAT. Payment conditions: 100% upon order.

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

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

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

City / zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

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

☐ I accept the terms and conditions of business  
(p. 26-27)

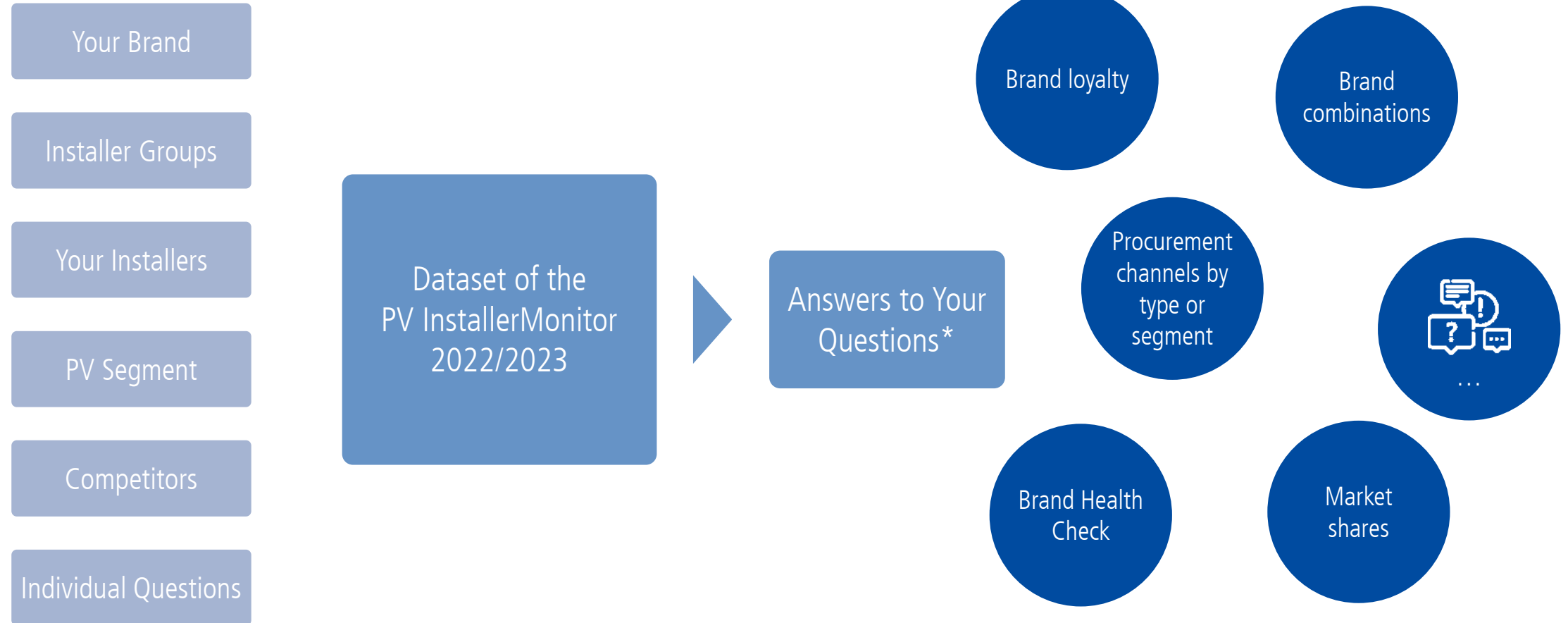
Date: \_\_\_\_\_

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

E-Mail to the attention of  
Saif Islam | Senior Consultant  
[s.islam@eupd-research.com](mailto:s.islam@eupd-research.com)

# DATASET WITH FURTHER POTENTIAL

Optional: Company-specific analysis | More information upon request



\*Depending on the number of mentions and general data availability

# ADDITIONAL PRODUCTS AND SERVICES

## BRAND HEALTH CHECK



The data set allows in-depth analysis, that will help you answer individual questions for your company. In addition to the regular results of the PV InstallerMonitor® 2022/2023, various questions are evaluated only for the installers that carry your products (or those of selected competitors) in their portfolio. For certain countries, EUPD Research is able to include a part on end customers, as well.

## CUSTOMER SATISFACTION

To guarantee the sustainability of your customers' satisfaction, it is important to get an overview regarding the current status of the brand in the perception of the most important target group – the installers.

In consultation with you, a questionnaire is developed to review the customer journey: communication and marketing, sales, product policy, price, order processing, distribution and service.

A 'Voice of Customer Survey' documents the successful areas and highlights the fields with potential for improvement in areas with the biggest impact in relevant countries.

## TOP BRAND PV SEALS 2023



Since 2011, EUPD Research awards the 'Top Brand' Seals to manufacturers and wholesalers who convince with their successful brand management. The seal is given out in the categories 'Modules', 'Inverters', 'Wholesaler', 'Storage', 'Mounting Systems' and 'HEMS'. The data for the scoring is derived from the 'PV InstallerMonitor® 2022/2023'.

## About EUPD Research

# EUPD RESEARCH

## RESEARCH | CERTIFICATION | CONSULTING

### EUPD Research

smart.energy.intelligence.

#### Market Research

- Market analyses
- Competition analyses
- Product analyses
- Price analyses

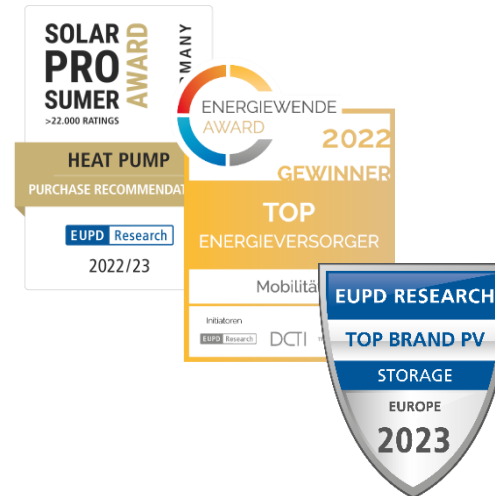


### EUPD Cert

smart.energy.trust.

#### Certification

- Top Brand
- Customer Satisfaction Seal
- Energy Transition Award
- SolarProsumerAward
- Top Brand PV Installers



### EUPD Consult

smart.energy.impact.

#### Exclusive Consulting

- Within the scope of strategic consulting projects, we focus on the review, further development or redevelopment of the company's orientation, we rethink concepts, measures or the positioning within the competitive environment and shape growth paths and business models
- Our future-oriented consulting services analyze both the corporate environment and the fundamental objectives of the client



## THE REFERENCES OF EUPD RESEARCH – EXTRACT



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# 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 GmbH 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 GmbH 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 GmbH 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 only. As far as the customer (for example an agency) exclusively acts as the purchaser for a user mentioned by name within the order, then the right of use applies solely for said user.

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

5.4 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 October 2022