



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

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 | January 2023



# BENEFITS OF THE PV InstallerMonitor 2022/2023©

## Utilize the Report to:

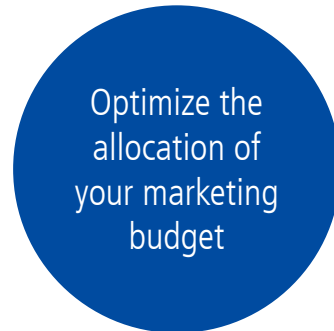
Measure the success of your marketing activities within the target group of the installers

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

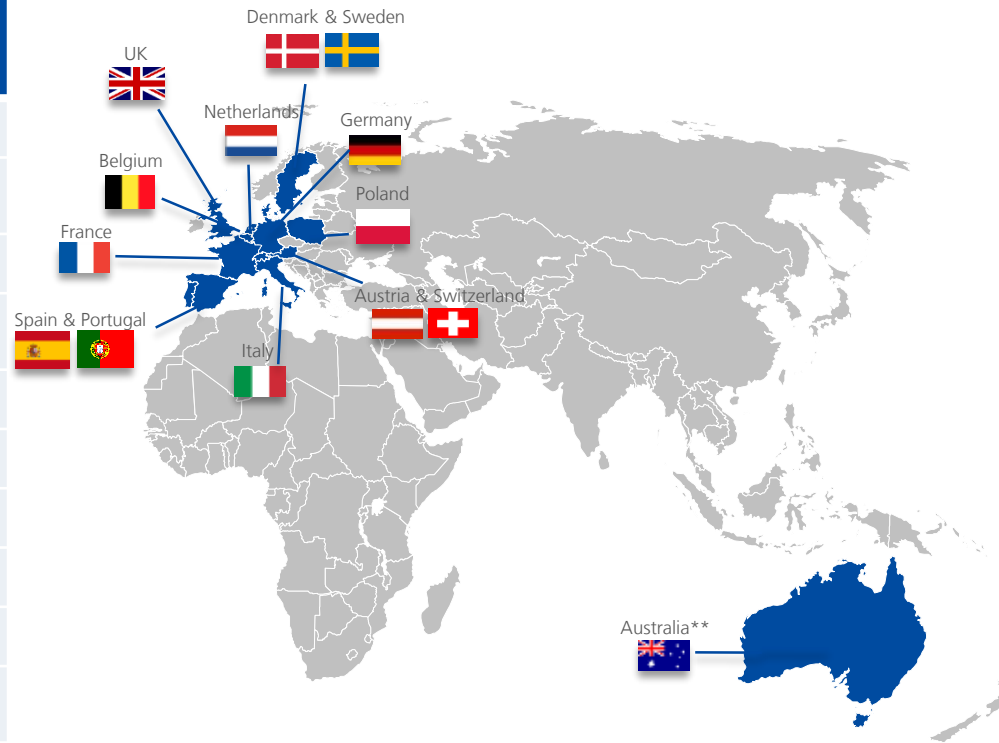


## Content of the PV InstallerMonitor

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

The PV InstallerMonitor 2022/2023<sup>©</sup> 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=150
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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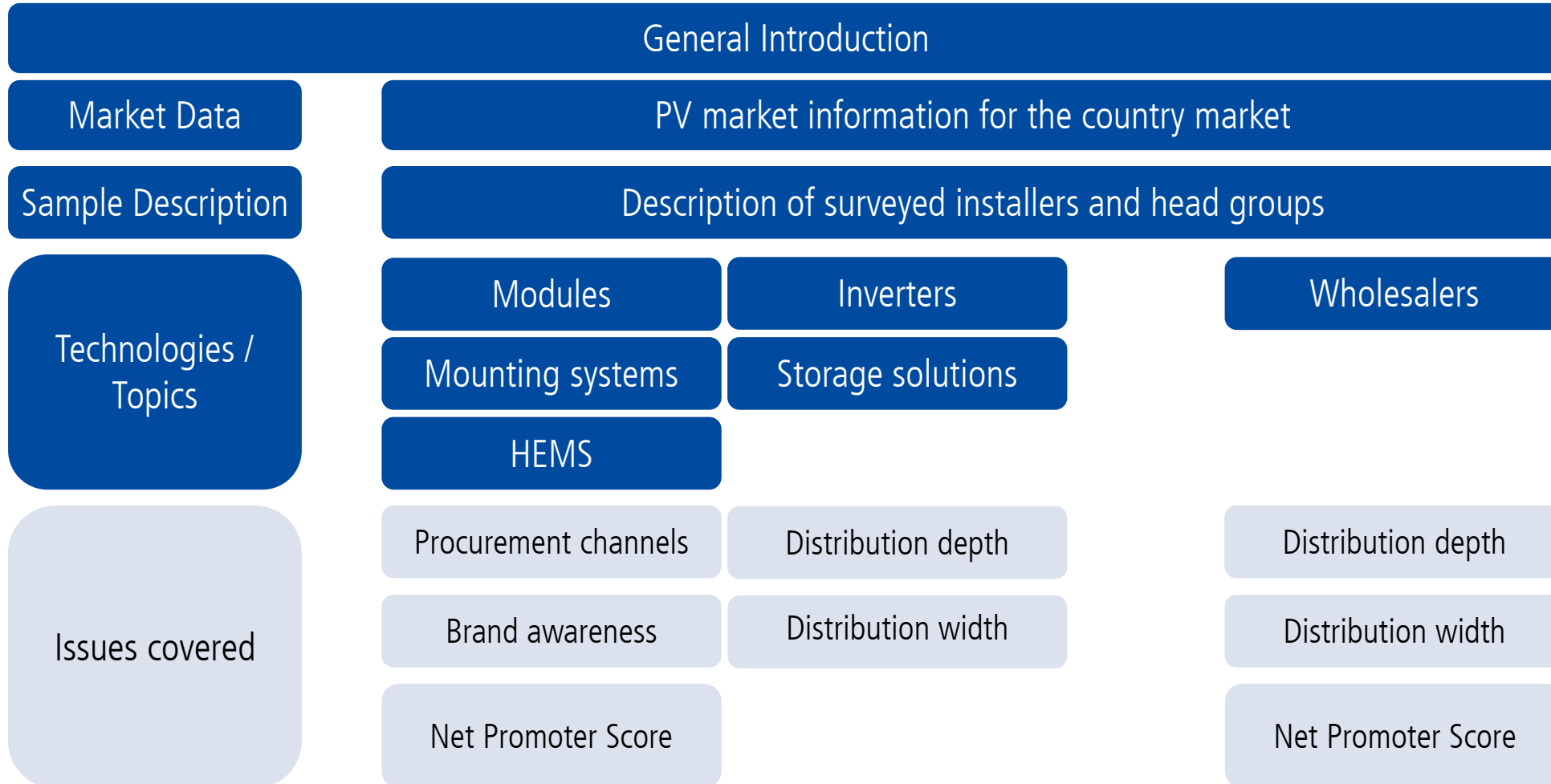
## The Content

- **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



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The Content

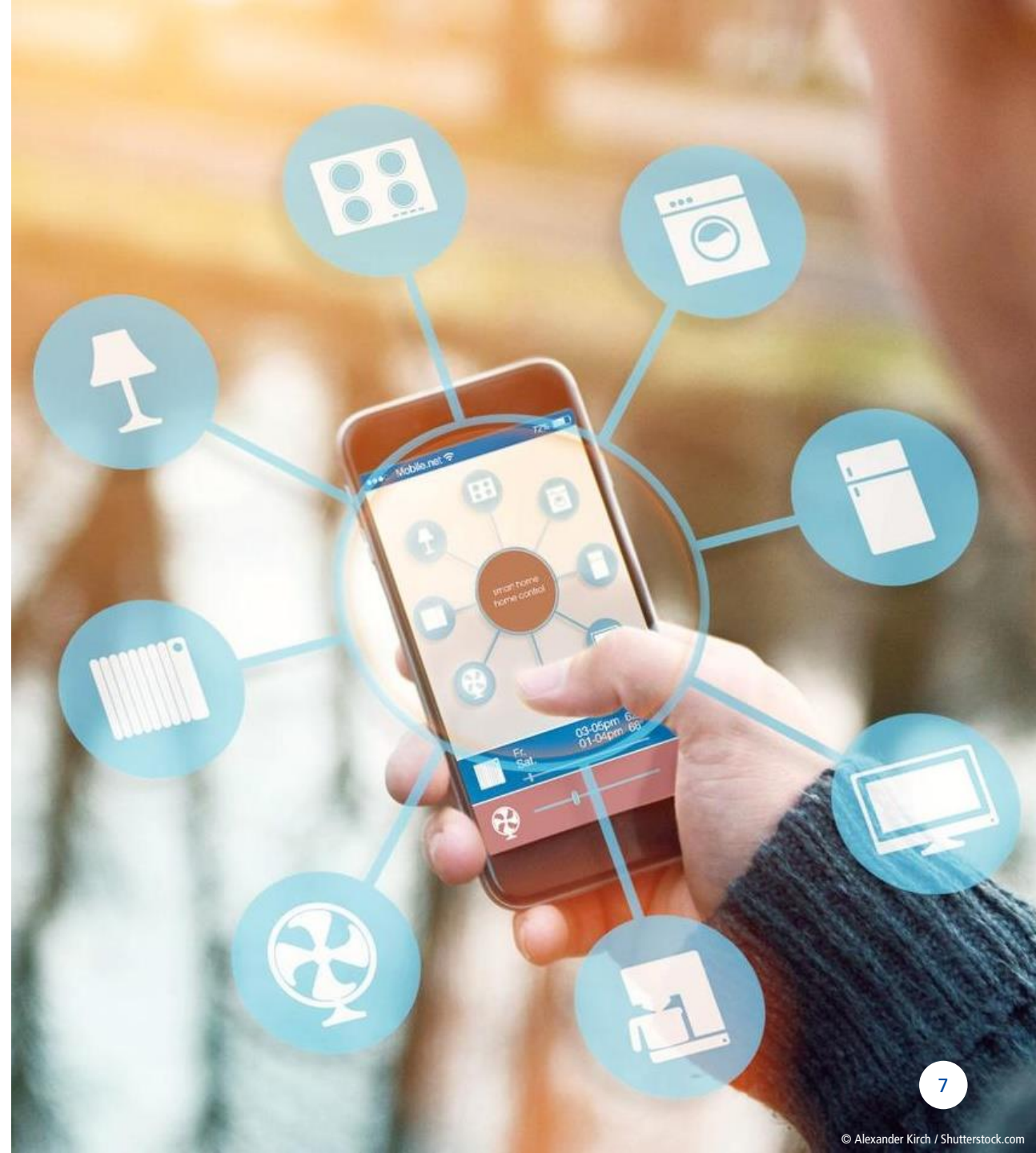


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New this year

- 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?



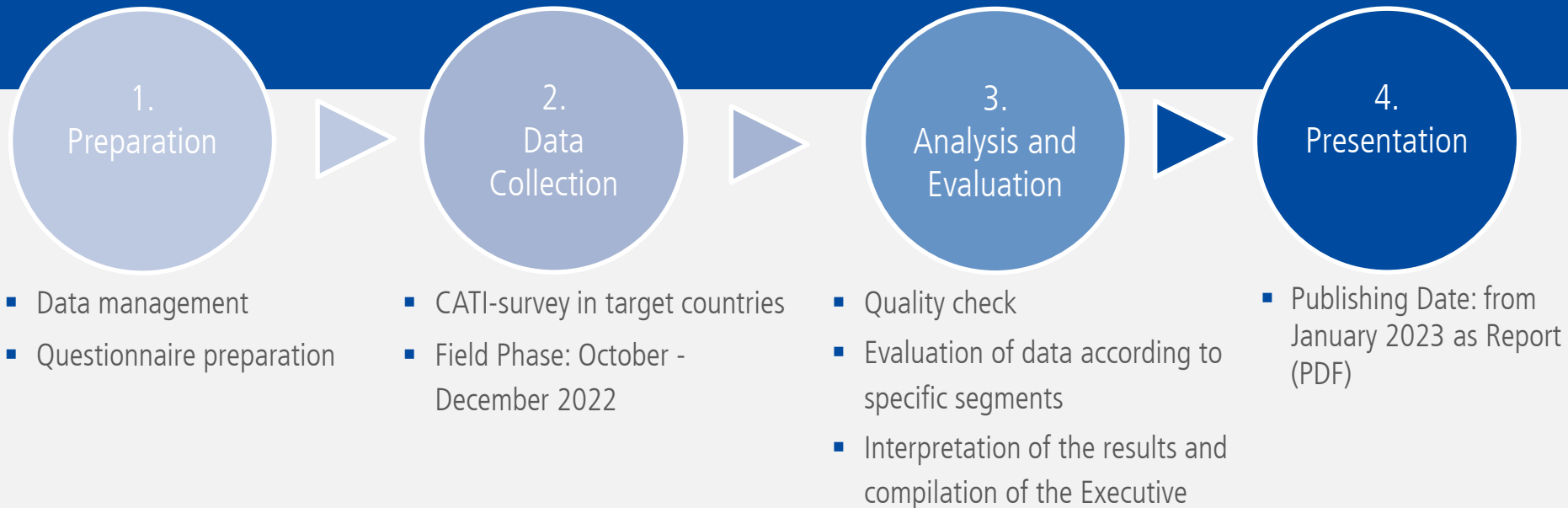
## Methodology of the PV InstallerMonitor



# 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<sup>©</sup>

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.



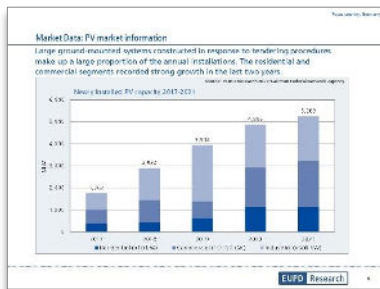
## About EUPD Research

# EUPD RESEARCH RESEARCH | CERTIFICATION | CONSULTING

## EUPD Research

### Market Research

- Market Analyses, e.g.  
SolarProsumerMonitor<sup>®</sup>  
Market Monitor Charging Stations<sup>®</sup>
- Competition Analyses
- Product Analyses
- Price Analyses



## EUPD Research

## EUPD Cert

### Certification

- Top Brand PV | Top PV Supplier
- Customer Satisfaction Seal
- Energy Transition Award
- SolarProsumer Award



## EUPD Consult

### 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

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# EUPD Research Sustainable Management GmbH

Adenauerallee 134

53113 Bonn

Phone +49 (0) 228-504 36-0

Fax +49 (0) 228-504 36-0

[welcome@eupd-research.com](mailto:welcome@eupd-research.com)

[www.eupd-research.com](http://www.eupd-research.com)



**SENIOR PROJECT MANAGER**

Hanna Schmole

Phone +49 (0) 228-504 36-38

[h.schmole@eupd-research.com](mailto:h.schmole@eupd-research.com)



**SENIOR CONSULTANT**

Saif Islam

Phone +49 (0) 228-504 36--20

[s.islam@eupd-research.com](mailto:s.islam@eupd-research.com)



**FOUNDER & CEO**

Markus A.W. Hoehner

Phone +49 (0) 228-504 36-50

[m.hoehner@eupd-research.com](mailto:m.hoehner@eupd-research.com)



**PARTNER**

Leo Ganz

Phone +49 (0) 160-1551339

[l.ganz@eupd-research.com](mailto:l.ganz@eupd-research.com)