Global PV InstallerMonitor 2020/2021

Understanding the key market intermediaries – the PV installers – in the markets

Australia, Austria & Switzerland, Belgium, France, Germany, Italy, the Netherlands, Poland and Spain
CHANCES & CHALLENGES

- The PV markets in Europe and Australia have shown constant growth for many years now.
- Markets with a large rooftop segment offer a constant investment environment and favorable margins.

Source: EUPD Research 2020
CHANCES & CHALLENGES

- However, all markets are structured differently.
- To be successful, you need to understand the key market intermediaries in the different markets.
THE GATE KEEPERS

- The recommendation of the installer is the main reason for customers to choose a certain brand. For manufacturers, it is therefore of high importance to be well positioned in terms of brand awareness and recommendation.
- Having reached a wide distribution in the installers’ portfolios, it is vital to assure one's position by maintaining a high level of satisfaction. This is expressed, for example, by a high rate of recommendation, which again leads to a broader brand awareness.
- Understanding the PV installers, their attitudes and needs, is of crucial importance for your successful PV business. Installers are directly connected to the customers and know the current market trends.

Top 3 reasons for German end customers to choose a certain module brand

- Guarantee: 44% Very important, 31% Important, 13% Neutral, 3% Neutral, 4% Not important
- Recommendation by installer: 32% Very important, 33% Important, 13% Neutral, 6% Neutral, 9% Not important
- Quality seal: 24% Very important, 31% Important, 18% Neutral, 7% Neutral, 11% Not important

n=560
THE GLOBAL PV INSTALLERMONITOR©

- Receive insights on aspects such as procurement, brand buying behavior and satisfaction for wholesalers, modules and storage.
- Benchmark your company against your main competitors.
- Analyse the buying- and decision making process of installers.
- Identify potential for improvements.
- Communicate your success based on valid stats and figures.
CHECK THE KPI’S REGARDING UNAIDED BRAND AWARENESS, DISTRIBUTION WIDTH AND DEPTH, NET PROMOTER SCORE, EXPECTATION VERSUS SATISFACTION, AND RECOMMENDATION RATE.
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.
- Verify the most important features that influence the decision making process of installers.
- Find out which brands are avoided by installers.
- Use these indicators to measure your sales-, marketing- and communication activities.
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.
THE SATISFACTION LEADS TO SUSTAINABILITY.

- Count your promoters and deduct the customers that are critical.
- Calculate your Net Promoter Score and compare it with the results of your main competitors.
- Analyze the difference between expectation and satisfaction of the most important brands.
- Identify the items that overperform in terms of the most vital business aspect, and those who do not reach the required satisfaction levels.
- Verify the items that influence the satisfaction most and least.
ENERGY STORAGE AND E-MOBILITY ARE THE NEW BUSINESS DRIVERS.

- Understand the installers that already offer energy storage and e-mobility solutions, and those that will do in the near future.

- Anticipate the further development of these industries and the importance for installers.

- Measure the number of existing and upcoming storage and wallbox installations.

- Receive insights into the potential of new and retrofit installations.

- Prepare yourself for installers who will offer solutions from both segments.
THE INSTALLERS HAVE A MULTIFARIOUS BACKGROUND.

✓ Distinguish the surveyed installers according to their:
  - type of business
  - installed capacity
  - number of employees
  - experience in the PV industry

✓ Measure their level of activity in the fields of energy storage and e-mobility.

✓ Understand their backgrounds to enable to address it pro-actively and focused.
THE MARKETS AND THEIR FRAMEWORK CONDITIONS CHANGE.

- Retrace the cumulated and installed capacity in the relevant segments.
- Understand the main funding schemes.
- Use the key market data for your planning.

Market insights

Solar PV

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CAGR (2016-2019): 36%

Source: EUPO Research, German Federal Network Agency

Market insights

Solar PV – Funding schemes

- Feed in Tariff
- Netherlands
- Net metering

$ Feed in Tariff
- SDE+ scheme grants a premium on top of the market price
- The sum of the premium is variable and depends on the annual electricity market price development and is adjusted by a correction value
- Paid for a period of up to 15 years

$ Net-metering
- For small producers
- The exact level of support depends on the amount of electricity fed into the grid and the client’s electricity consumption
- From 2023, the compensation scheme will be phased out gradually until 2031.
Utilize the Global PV InstallerMonitor© to:

- Measure the success of your marketing activities within the target group of the installers
- Determine your brand strength compared to the competition
- Receive detailed feedback about your products and services from the installers
- Understand where your competitors score and where your opportunities lie
- 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 product- and service portfolio to the installer’s requirements
EUPD Research Sustainable Management GmbH
Adenauerallee 134
53113 Bonn
Phone +49 (0) 228-971 43-0
Fax +49 (0) 228-971 43-11
welcome@eupd-research.com
www.eupd-research.com

Contacts

PROJECT MANAGER
Hanna Schmole
Phone +49 (0) 228-971 43-38
h.schmole@eupd-research.com

SENIOR CONSULTANT
Saif Islam
Phone +49 (0) 228-971 43-20
s.islam@eupd-research.com

PARTNER
Leo Ganz
Phone +49 (0) 160-1551339
l.ganz@eupd-research.com

RESEARCH CONSULTANT
Davide Pesenti
Phone +49 (0) 228-971 43-35
d.pesenti@eupd-research.com