



PV BrandMonitor[®] 2008/2009 - Germany

Brand Awareness of Solar Manufacturers in the German Photovoltaic Market

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Editorial

1. Background

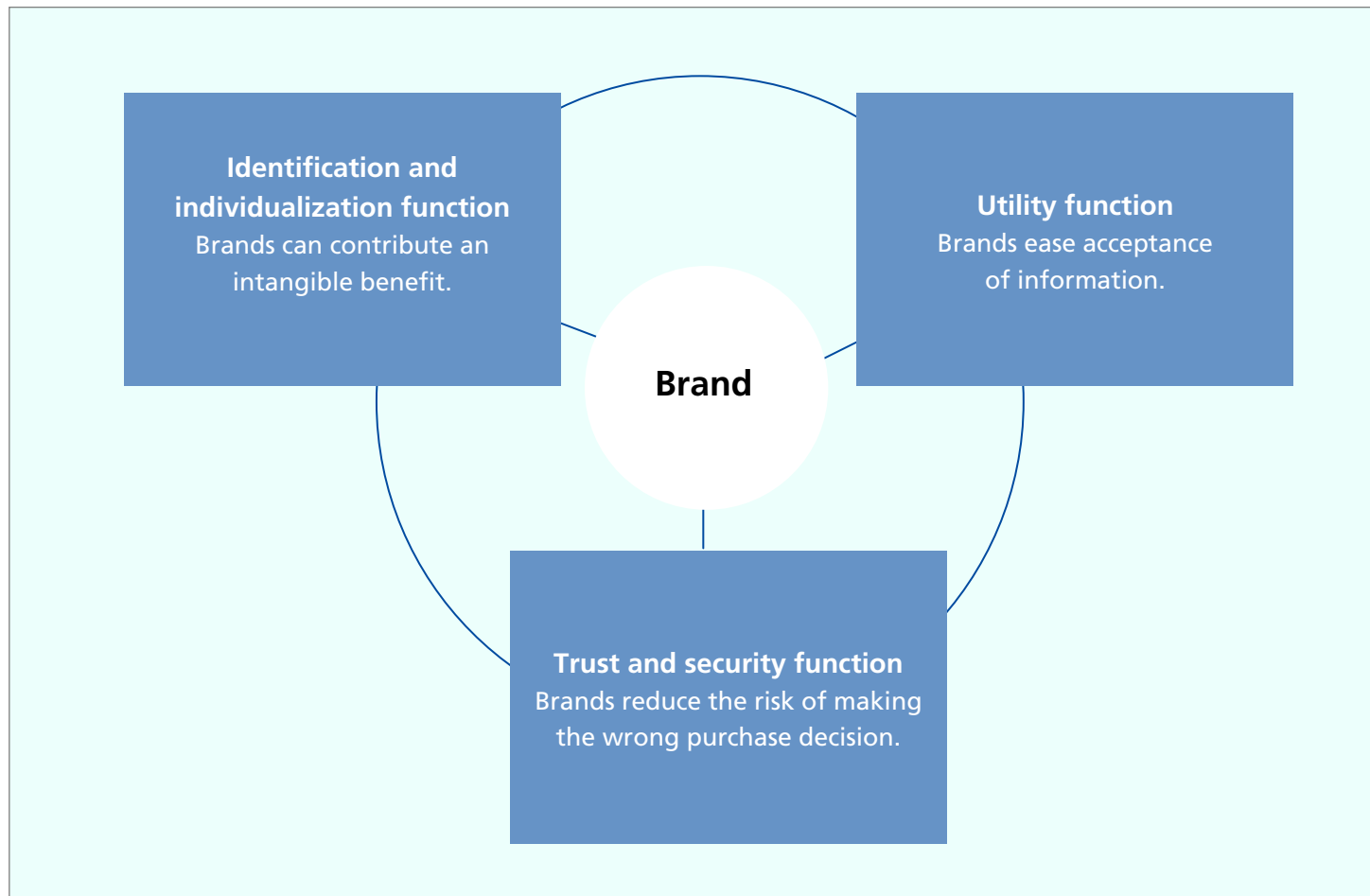
The question of brand image is becoming increasingly significant for solar companies. The price decreases in importance from its previous position as the most significant criterion for a purchase decision. At the same time, products are coming under increasing levels of competition. The number of companies offering solar modules is constantly rising, while the main sales market in Germany is stagnating and the future outlook in young, hopeful markets such as Spain and Italy is uncertain. Knowledge about the brand image and the changes it is undergoing as well as the establishment of a brand function are therefore an important foundation stone for companies. These assets assist them to conduct targeted marketing in an atmosphere of competition for end customers.

Some market players have identified this trend and appear more and more in the public eye. Some examples include the increasing level of advertising in mass media from companies like Schüco, or exceptional promotional campaigns such as SolarWorld sponsoring the live coverage of the LiveEarth benefit concert. Thus it is becoming ever more interesting for solar companies to measure the effect of these campaigns and to evaluate the worth of the company brand. For the third year in a row, EuPD Research is therefore carrying out the PV BrandMonitor® to discover the brand awareness of solar manufacturers on the German market. Among other things, the analysis provides answers to the following questions:

- Do German citizens know the brand names of solar products?
- If they do, where did they get their information from?
- What characteristics do they associate with the individual brands?
- What role does the brand play in purchase decisions?

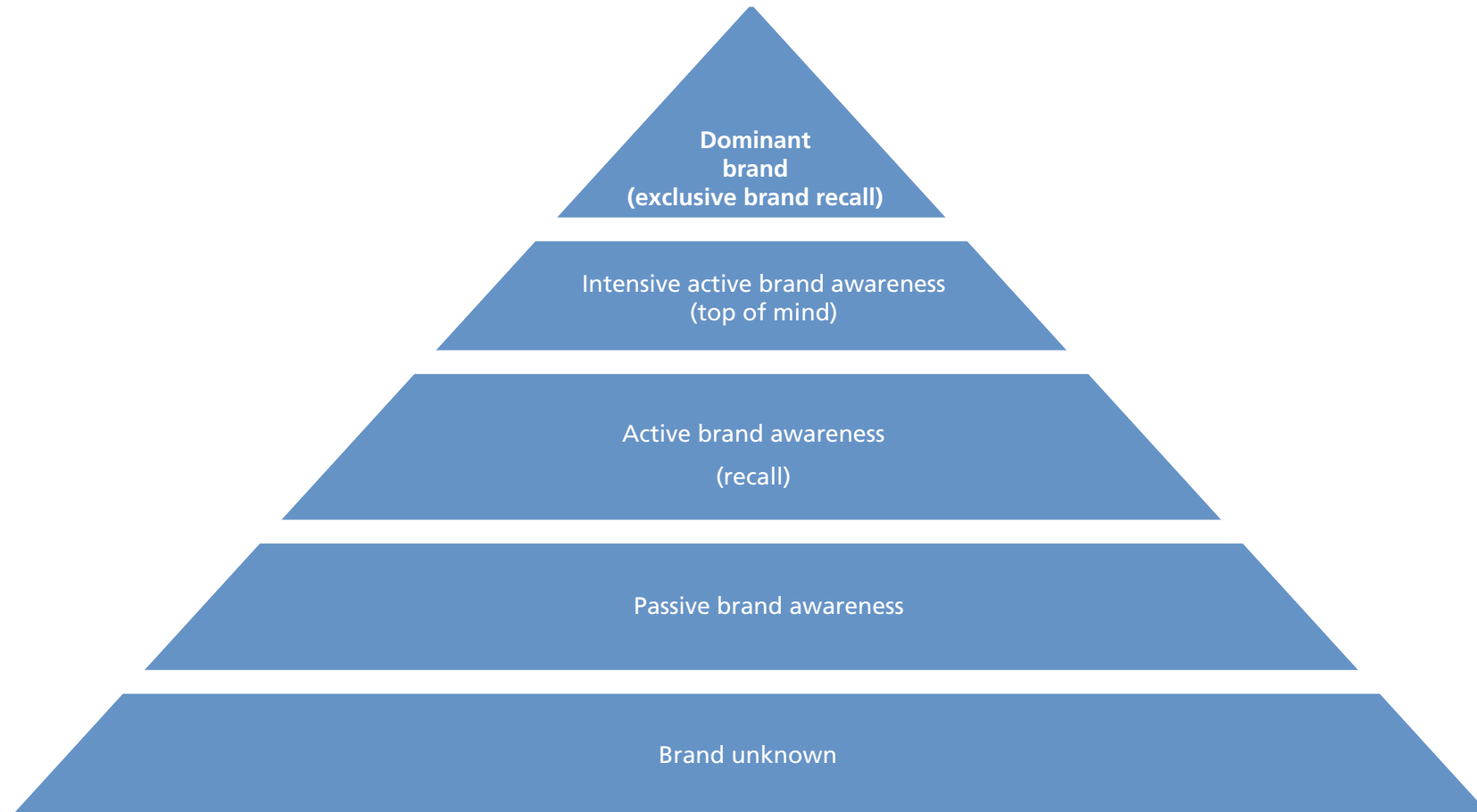
2. Basic Functions of a Brand

A brand fulfills three basic functions for sales intermediaries and consumers:



3. Brand Awareness Pyramid

The depth of brand awareness relates to the likelihood that a consumer will think of a brand and how easily it occurs to him. The compilation of brand identity serves as a basis for the control of brand image.



4. Competitive Advantage Provided by a Strong Brand

By establishing a strong brand, your company can lay a foundation block for decisive advantages in the competition for end customers.

+	Company's own portfolio distinguished above competitor's
+	Generation of a halo effect, through which the brand has a positive impact on the evaluation of other individual product characteristics
+	Protection from crises and influences of the competition
+	Higher brand loyalty and commitment
+	Positive effects on purchase decision

5. Aims of the Study and Method

Objective

The value of a brand is principally defined by its reception among consumers. The PV BrandMonitor® reflects the brand awareness of solar manufacturers and the associations of a brand on the basis of a representative survey among members of the public. EuPD Research has been conducting a survey about this topic every year with 1,000 German citizens aged 18 and up since 2006.

Method

- Random selection of 1,000 people over 18
- Survey undertaken by telephone (CATI)
- Survey period: once a year; on request every quarter

6. Contents of the Survey

The examination includes the following:

- Approx. 18 questions regarding solar
 - Awareness/contact with the topic of solar energy
 - Personal opinions about solar energy
 - Ownership or planned ownership of a solar system
 - Associations with the topic of solar energy (e.g. political, economical, technical, ecological etc.)
 - Effect of advertising of solar products/market penetration
 - Evaluation of brand awareness through recall and recognition tests
 - Identification of brand awareness in the form of brand associations (unsupported)
 - Use of media forms
- Seven questions relating to socio-demographic aspects

Product

- PPT presentation with around 80 slides
- Meaningful graphs with results narrated

7. Advantages for You

Through the examination, your company can gain information about the following aspects, for example:

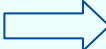
- How well-known is your company among members of the public?
- What information channels do German end customers use?
- What do different types of consumer think about photovoltaics and your company?
- What role does the brand name play in the context of a purchase decision for a photovoltaic system today?
- Perception of solar brands in an historical comparison (2007 and 2008)

If your company is mentioned more than 30 times, an exclusive analysis of your brand name can be conducted in comparison to other well-known solar brands.

7. Price Advantage

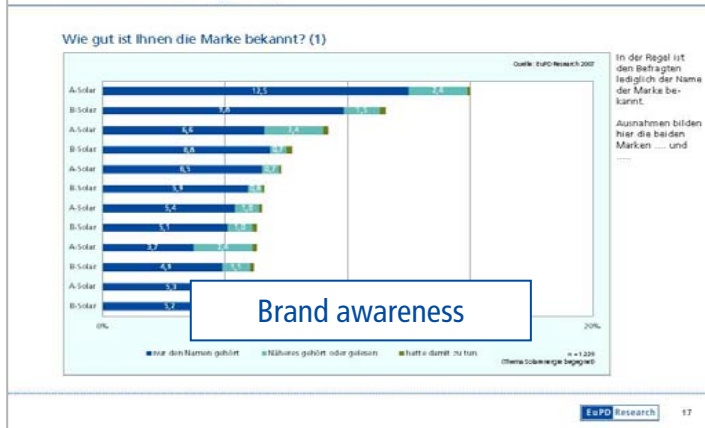
The **PV BrandMonitor**® is part of EuPD Research's 'Shared Service' concept. In directly addressing multiple prospective customers, the individual survey costs can be decreased significantly, while all transaction costs are covered by EuPD Research. With regard to the PV BrandMonitor®, this proceeding allows for a cost reduction of up to 75% compared to a conventional exclusive inquiry, without reducing your company's benefit. The following image illustrates the cost advantage of the 'Shared Service' compared to a conventional survey as offered by 'Forsa', a market research competitor.

Type of item	Number of items	Prices at comparable research institute	Number of items	Price EuPD Research
yes/no-question	2	1,440 Euros	2	complete price
closed question	22	18,920 Euros	22	
open question	6	6,900 Euros	6	
Total	30	27,260 Euros	30	6,950 Euros

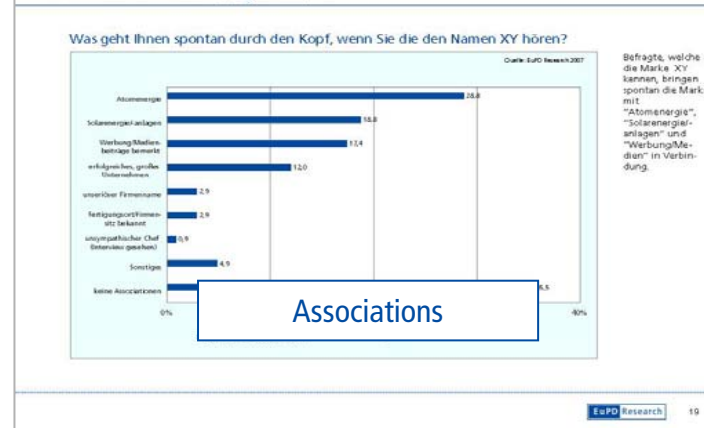

Total cost advantage for your company: 20,310 Euros

8. Example Graphs

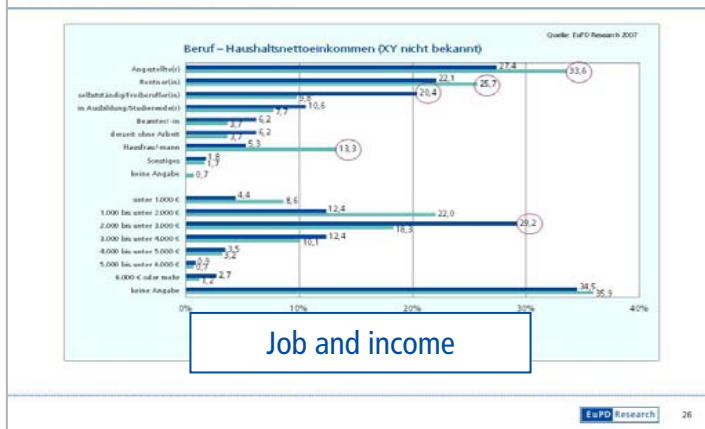
c.5. Markenbekanntheit (gestützt) V



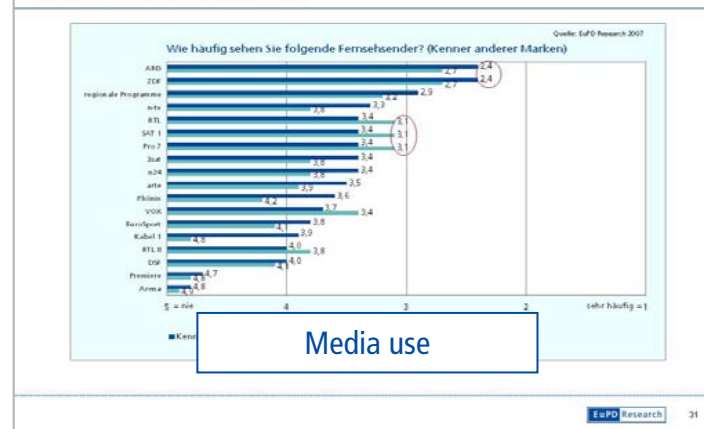
c.6. Markenbekanntheit (ungestützt) VI



d.2. Charakteristika der XY-Kenner II

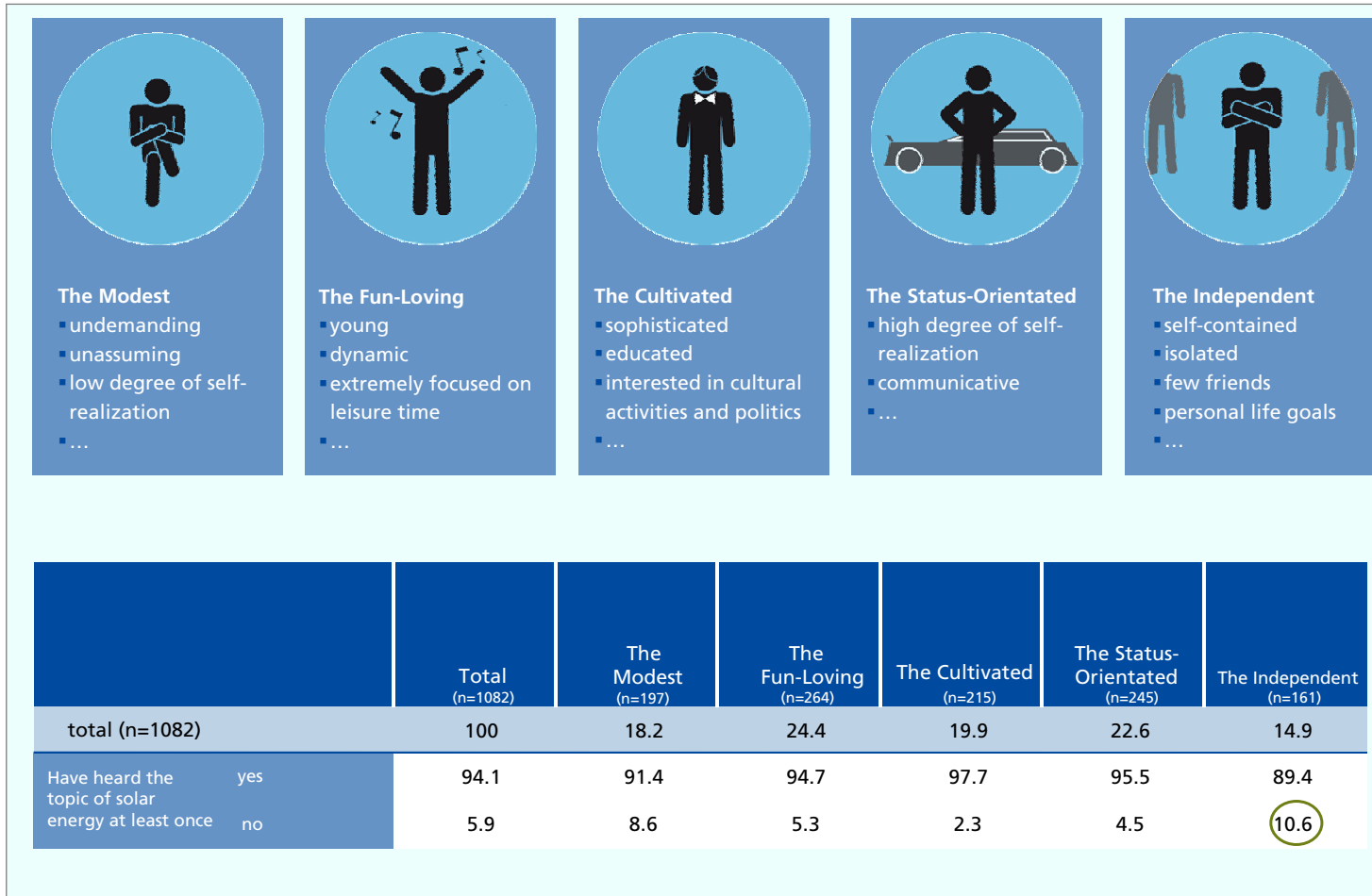


d.5. Charakteristika der XY-Kenner V



9. Example: Analysis According to Consumer Type

Example analysis according to consumer type: acquaintance with solar



In the context of the analysis, a model that we have developed for consumer types is used.

In this way, the following questions are answered:

- Who are the buyers of PV systems?
- Within what surroundings is a brand most likely to be known?

10. Company Names Used in the Survey

The following solar brands are used in the supported questions in the survey:

(On request we can include your company; final deadline for requests is November 14, 2008)

- aleo solar
- BP Solar
- Conergy
- ersol
- First Solar
- Fronius
- Kaco
- Kaneka
- Kyocera
- Mitsubishi Electric
- Photowatt
- Q-Cells
- REC
- Sanyo
- Schott Solar
- Schüco
- Sharp Solar
- SMA
- Solar-Fabrik
- SolarWorld
- Solon
- SunPower
- Suntech
- Sunways
- Tenesol
- Trina

EuPD Research

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

Contact

Markus A.W. Hoehner

CEO

Sarah Endres

Project Manager

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