

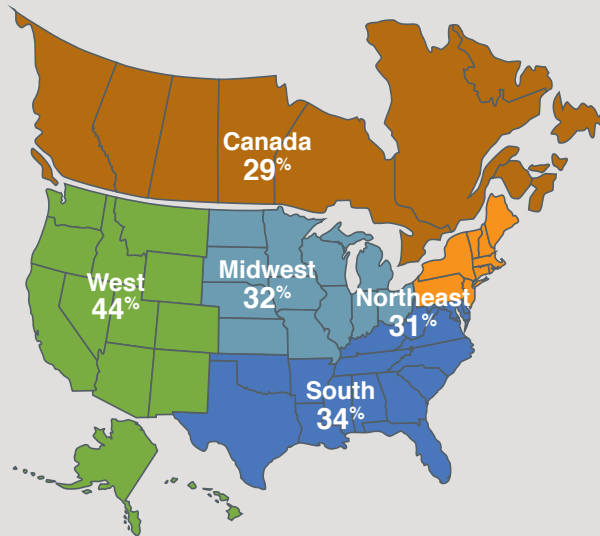


Utilities have an opportunity to retain and engage customers by supporting solar power.

### Business Customer Solar Panel Adoption



The percentage of **business customers** who report PV systems currently operating at their largest facilities



### Characteristics of Business Customers Adopting Solar



#### Top Business Sectors Who Have Already Adopted PV at Their Largest Facility

Retail: 50%  
Restaurant: 39%  
Office: 34%



#### Top Business Sectors who believe at least 25% of their electricity needs will be met by onsite PV within 5 years

Office: 91%  
Restaurant: 90%  
Retail: 84%



#### Top Business Sectors who believe at least 50% of their electricity needs will be met by onsite PV within 5 years

Restaurant: 60%  
Grocery: 54%  
Lodging/Hotels/Motels: 53%

### Key Drivers

#### The top reasons to adopt PV among business customers are:

- 1 Take advantage of rebates/tax credits: 37%
- 2 Eliminate uncertainty around future electric costs: 34%
- 3 Lower overall electricity costs: 34%
- 4 Avoid electric demand charges: 33%

### Key Barriers

#### The top barriers to PV adoption among business customers are:

- 1 Up-front costs too high: 28%
- 2 Not enough info to make an informed decision: 20%
- 3 Management has other priorities: 19%
- 4 Lack of confidence in performance or reliability of current PV technology: 18%
- 5 Don't know which vendors to trust: 16%

### Reducing Barriers

For business customers who identified barriers to PV adoption, **top factors that would tip the scales in the direction of acquisition are:**

Top factors are:

- 1 Case study access that demonstrates system performance (48%)
- 2 System performance guarantee from a reliable vendor (47%)
- 3 Up-front costs are completely eliminated (46%)
- 4 Overall system costs are meaningfully less than grid-supplied electricity (45%)

Note: The data are drawn from How Photovoltaic Systems and Distributed Generation Will Disrupt the Utility Industry: A 2015 E Source Multi-Client Study. Online surveys were conducted during March and April of 2015 with 802 total respondents representing non-residential facilities in eight targeted industry segments.