

A smart home control panel with a central house icon and various peripheral icons like a padlock, lightbulb, envelope, and clock. The panel is set against a dark blue background with glowing lines.

# European Electrical Installation Monitor Q2-2022

Theme topic: Smart buildings

July-2022

A product by **USP** Marketing Consultancy

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# About European Electrical Installation Monitor

## THE GOAL

To check and track the behaviour and trends in the European electrical installation market. This is done 4 times per year, by means of 805 phone interviews (per quarter) with registered electrical installation companies, divided over 7 major European markets.

## THE RESEARCH TOPICS

**Fixed part:** Economic developments of the installation companies in Europe (order book and turnover development)

### Quarterly theme topics in 2022:

Q1: Sustainability

Q2: Smart buildings

Q3: Services in the installation market

Q4: Branding

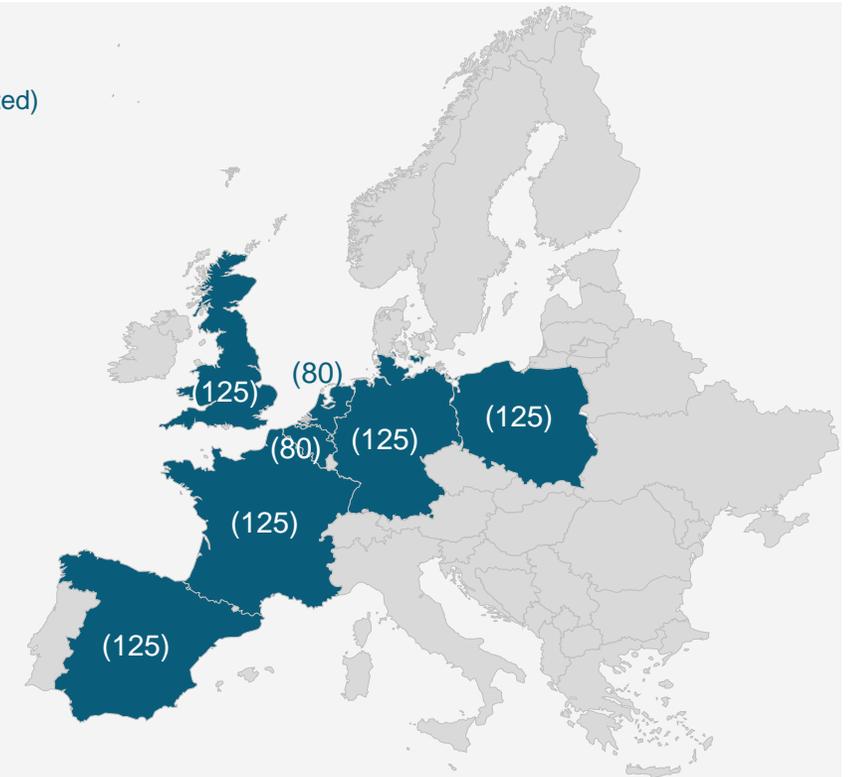
## THE TIMELINE



## COUNTRY SCOPE

(number of interviews conducted)

Background characteristics of the interviewed respondents can be found in the [appendix](#)



## PROJECT TEAM



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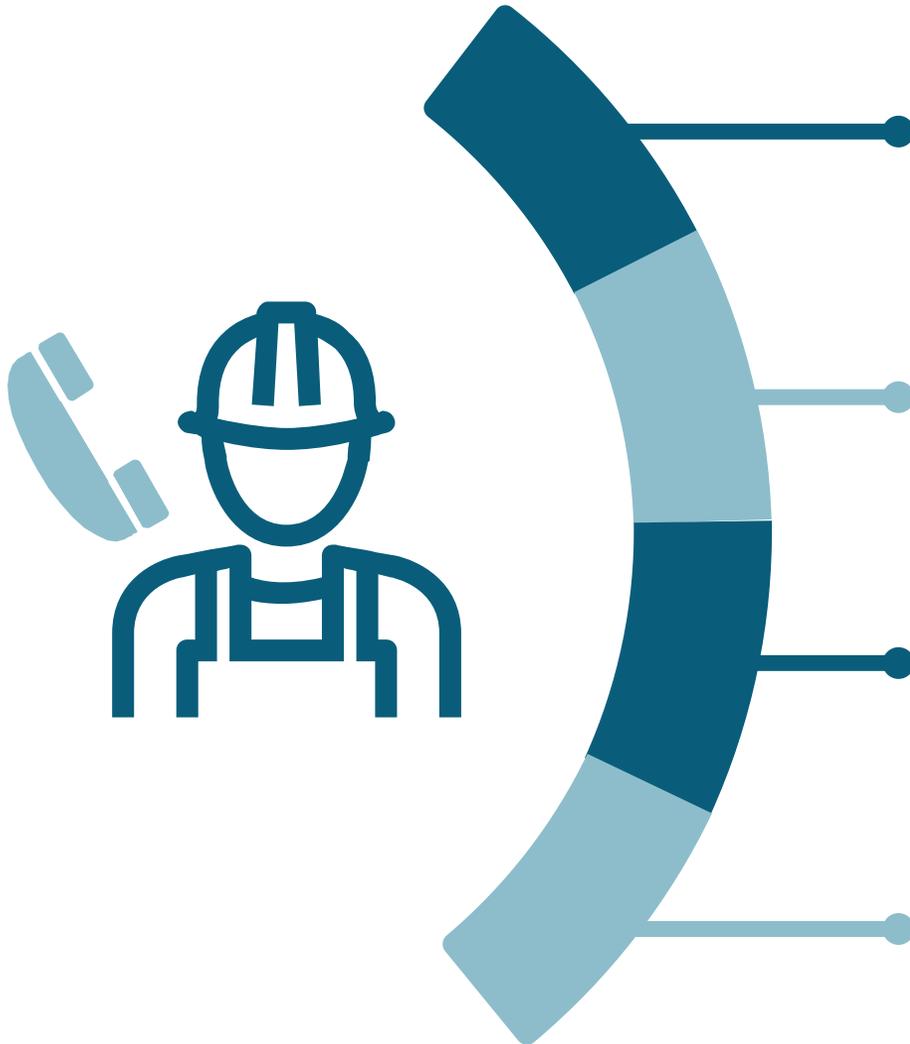
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hoogenboom@usp-mc.nl

# About target group & methodology



## Surveying electrical installation companies...

Interviewed companies need to provide electrical installation services, but they may also do other activities in addition (HVAC, plumbing, etc.). Most interviews are conducted with owners/ directors or purchasers of these companies.

## ... selected from a country-representative database

USP possesses an international database of electrical installation companies, which is constantly updated. Respondents are thus not part of a fixed panel; the sample varies from wave to wave.

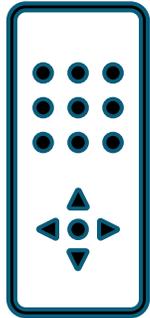
## ... through phone interviews, by native-speaking agents

Phone surveys are the best approach for obtaining a sufficient sample, in order to provide insights that can be relied on. These phone calls are made by fixed fieldwork partners, located in the respective countries.

## ... weighting the results based on company size groups

Country results are weighted so that all three company size groups\* have an equal influence on the total. As typically most interviews are conducted with small companies, we believe it is important to correct in order for big companies to have an equal impact on the 'total' results. This way the results are not heavily influenced by many smaller companies.

# About the Q2 theme topic



## Surveying the Smart building topic...

This quarter we investigated the topic of smart building and smart products installations, by asking installers about their involvement with and opinion about smart products and buildings.

Smart products are intelligent - have sensors, are connected to the Internet and are being controlled via apps.

## ...allows orientation towards a better quality of living and working

To provide the necessary insights, we covered the following topics:

- Installers' involvement in smart product installation
- Smart products development
- Working remotely with smart products
- Smart product installation professionals
- Smart product leaders on the market

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# Key takeaways



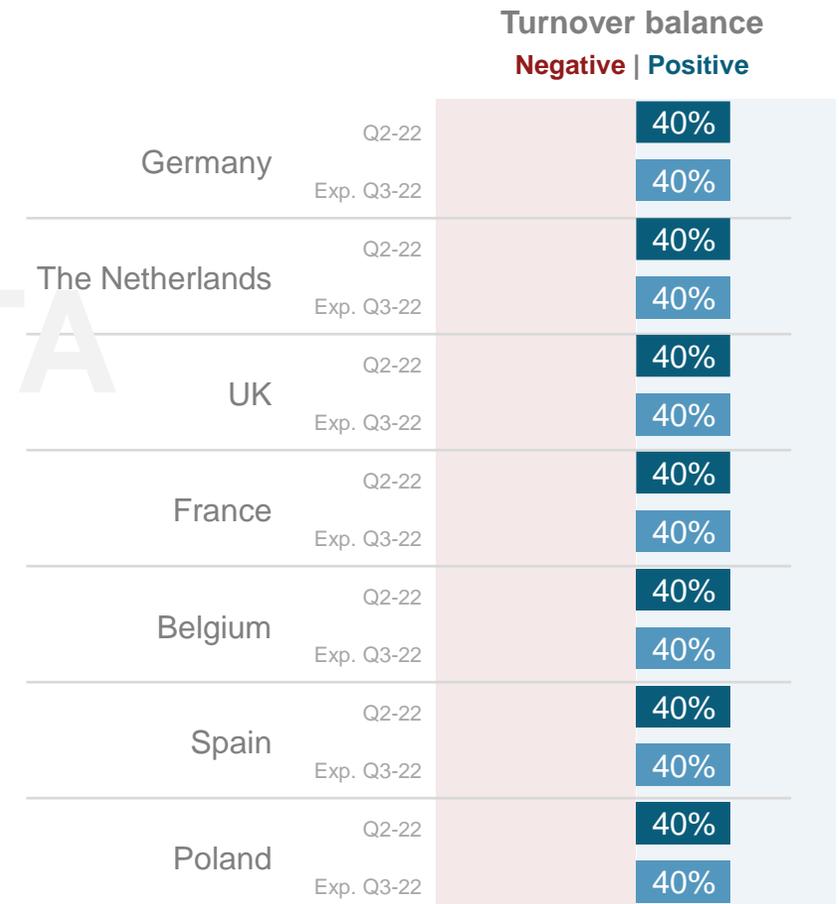
## Business Development

*Important: All quantitative data in this report was obtained during governmental COVID-19-related restrictions in the respective countries.*

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DUMMY DATA



# Key takeaways

## 2

### Smart buildings

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DUMMY DATA

### Smart building products installation

Q: Is your company involved in the installation of smart products?

Q: What percentage of your daily assignments are smart solutions related installations/ activities?

% of companies involved    % of daily assignments

UK	50%	50%
GE	50%	50%
FR	50%	50%
PO	50%	50%
BE	50%	50%
NL	50%	50%
SP	50%	50%

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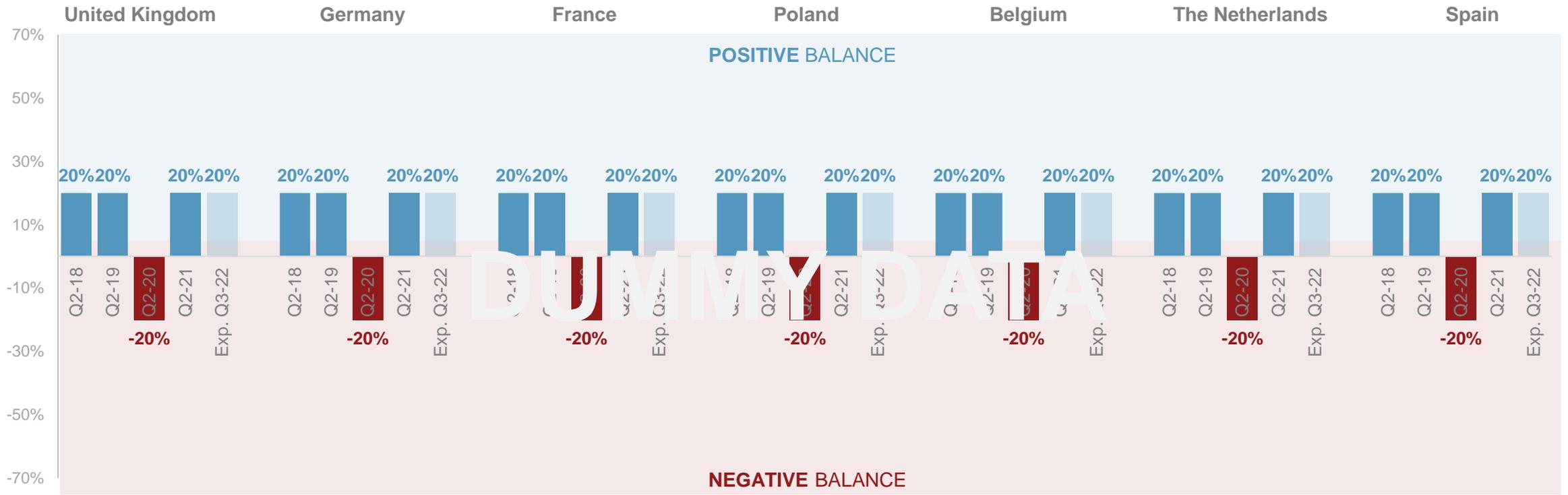


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## Turnover balance

Q: If you compare your turnover of Q2-22 to the same quarter last year, how did your turnover develop?

(% INCREASE minus % DECREASE)

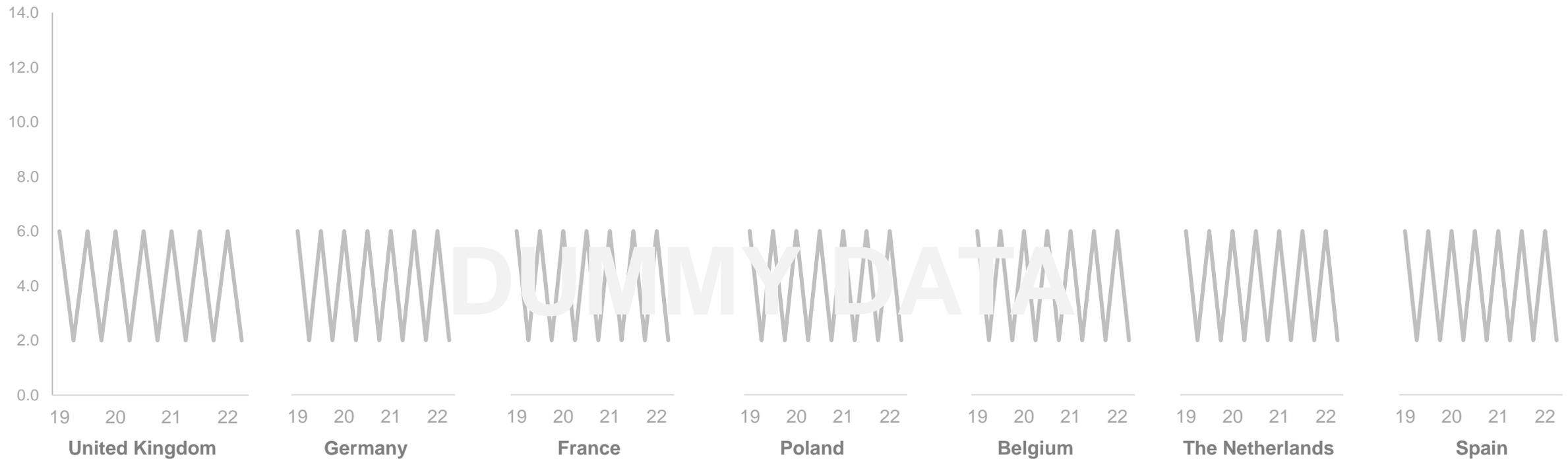


Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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## Order book portfolio

Q: How big is your current order book portfolio? For how many months will you be able to keep your current staff working?  
(MONTHS)



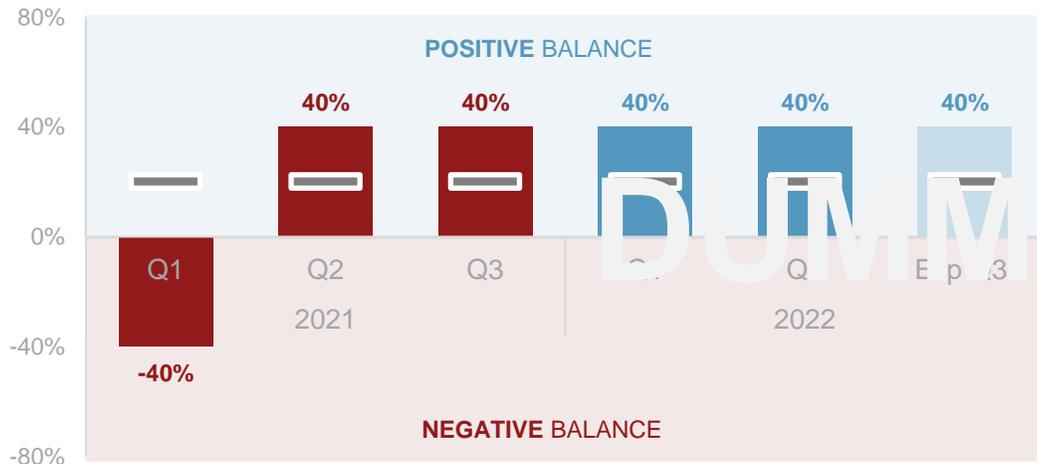
Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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## Turnover balance

Q: If you compare your turnover of Q2-22 to the same quarter last year, how did your turnover develop? What are your expectations for the development in Q3-22?

TURNOVER BALANCE = % INCREASE minus % DECREASE)  
 — COMPARISON SAME QUARTER LAST YEAR

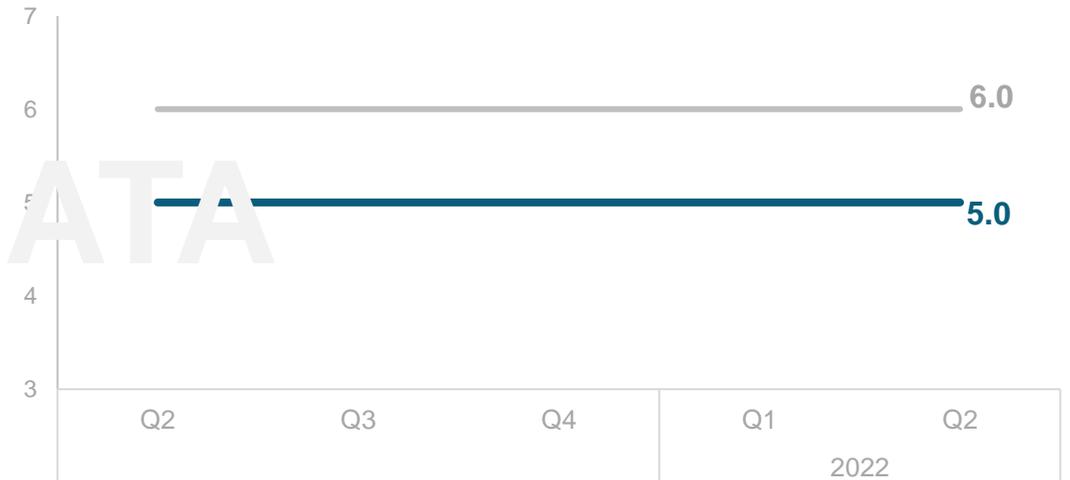


Detailed information regarding the turnover distribution can be found in the [appendix](#).

## Order book portfolio

Q: How big is your current order book portfolio?

ORDER BOOK (MONTHS)  
 Europe | **THE UNITED KINGDOM**



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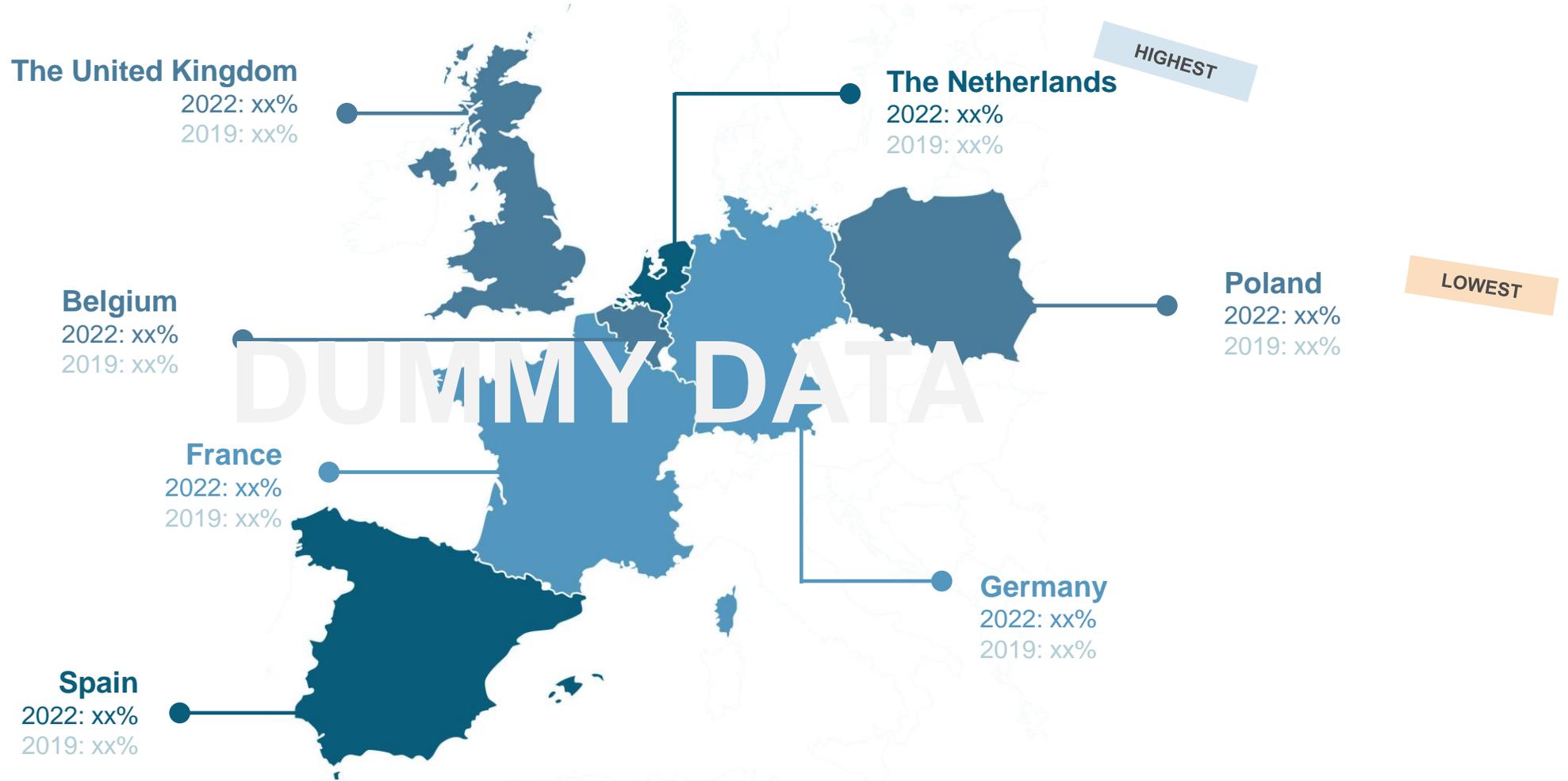
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## Average % of companies involved in installation of smart building products

(products that are connected to the internet and can communicate with other products in the system, or can be controlled via Internet or apps)



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## Smart product development of electrical installation industry

Q: The electrical installation industry is developing more and more products that are intelligent - have sensors, are connected to the Internet and are being controlled via apps. How do you feel about that development?

## The frontrunning industry

Q: In your opinion which of the following industries is the frontrunner in terms of home automation and smart products and buildings?

(Very) positive | Neutral | Negative (very) | Don't know

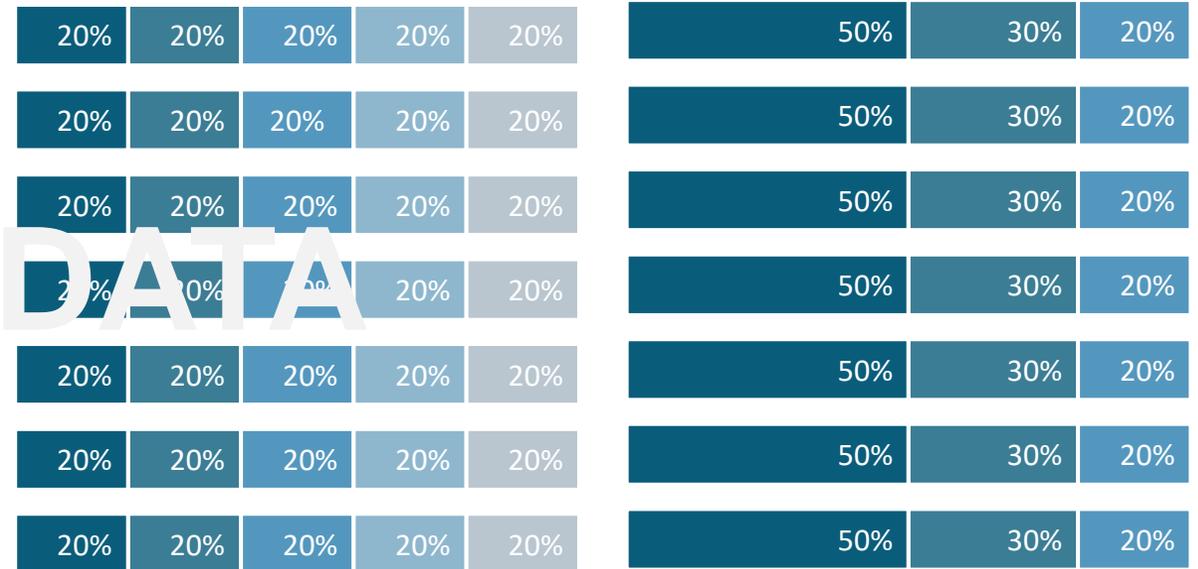


2022

2019

Electrical | Lighting | HVAC | Sanitary | DK

Electrical & lighting industry | HVAC | Sanitary

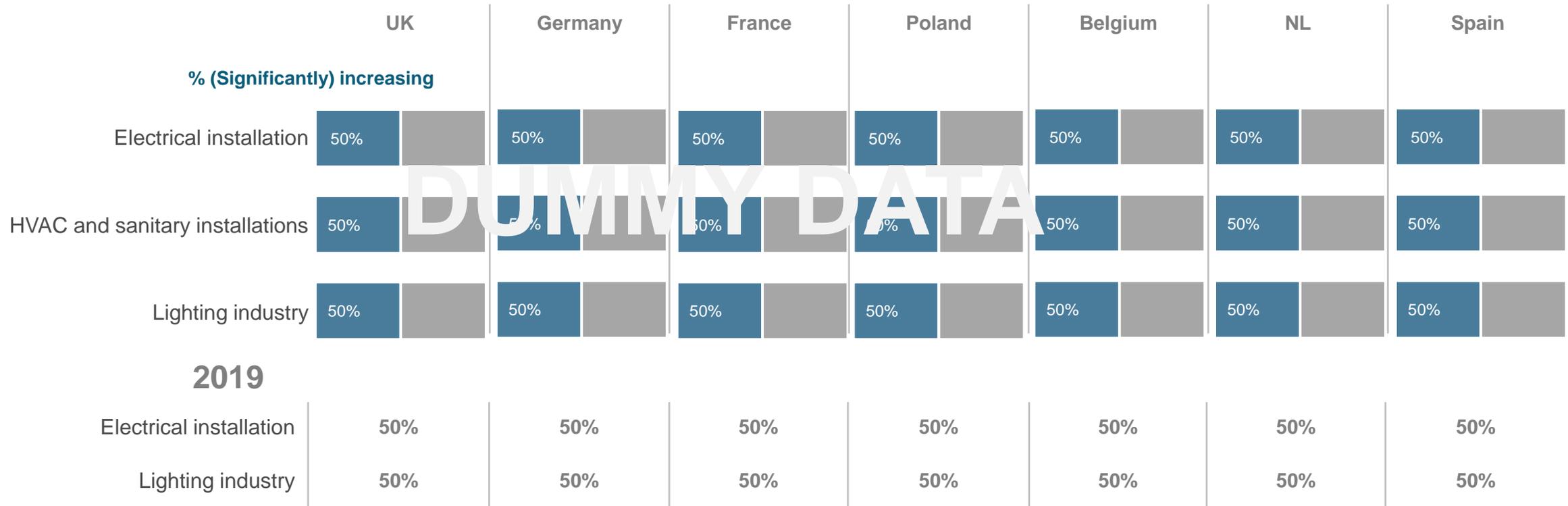


DUMMY DATA

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## Request and demand from clients for home automation and smart products

Q: From your experience in the last years what is happening with the request and the demand from clients for home automation and smart products related to the following types of installations?



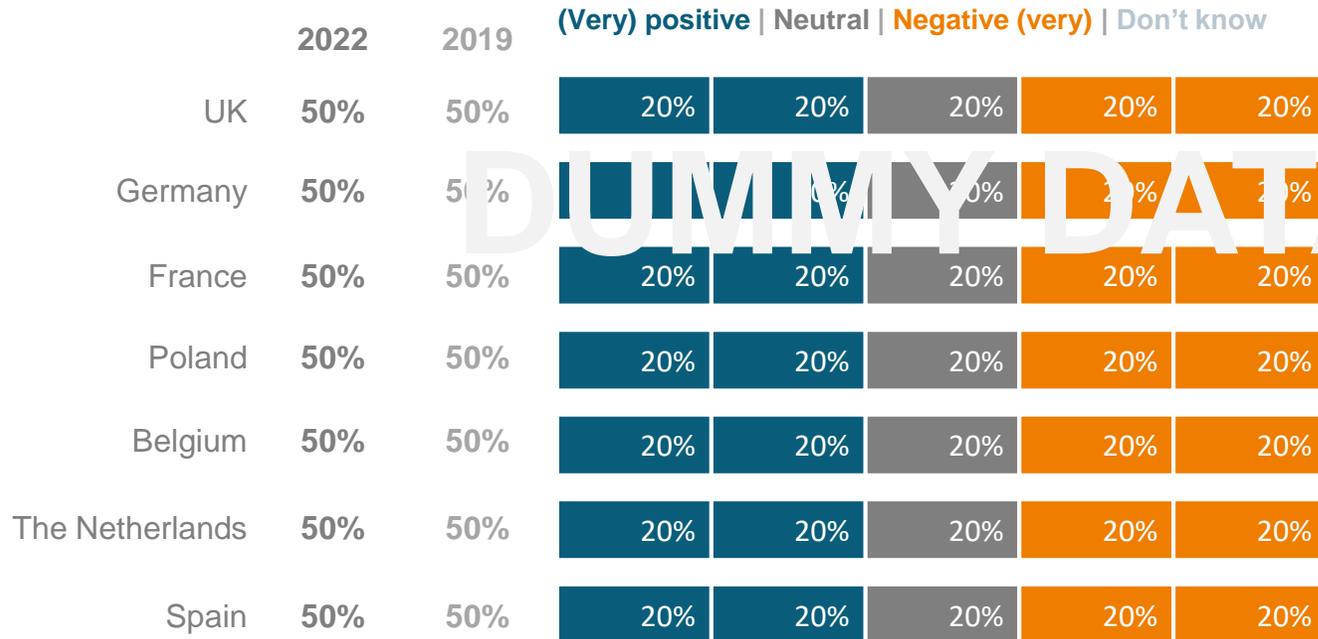
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## Working remotely

Q: An idea behind the smart products is that if they are connected to the Internet it will be possible to monitor the performance, diagnose, trouble shoot, maintain, and control them from a distance. Do you already have experience in working from distance with smart products?

Q: What is your experience with working from distance with smart products

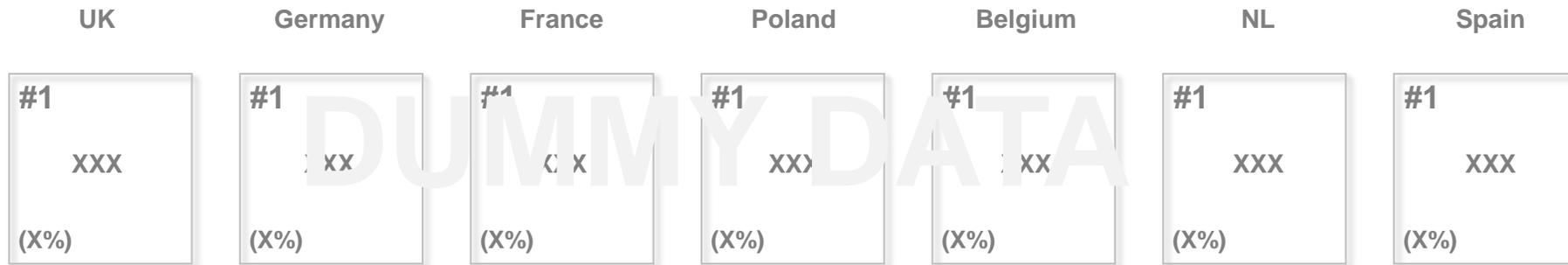
### % working remotely



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### Leaders in smart building solutions

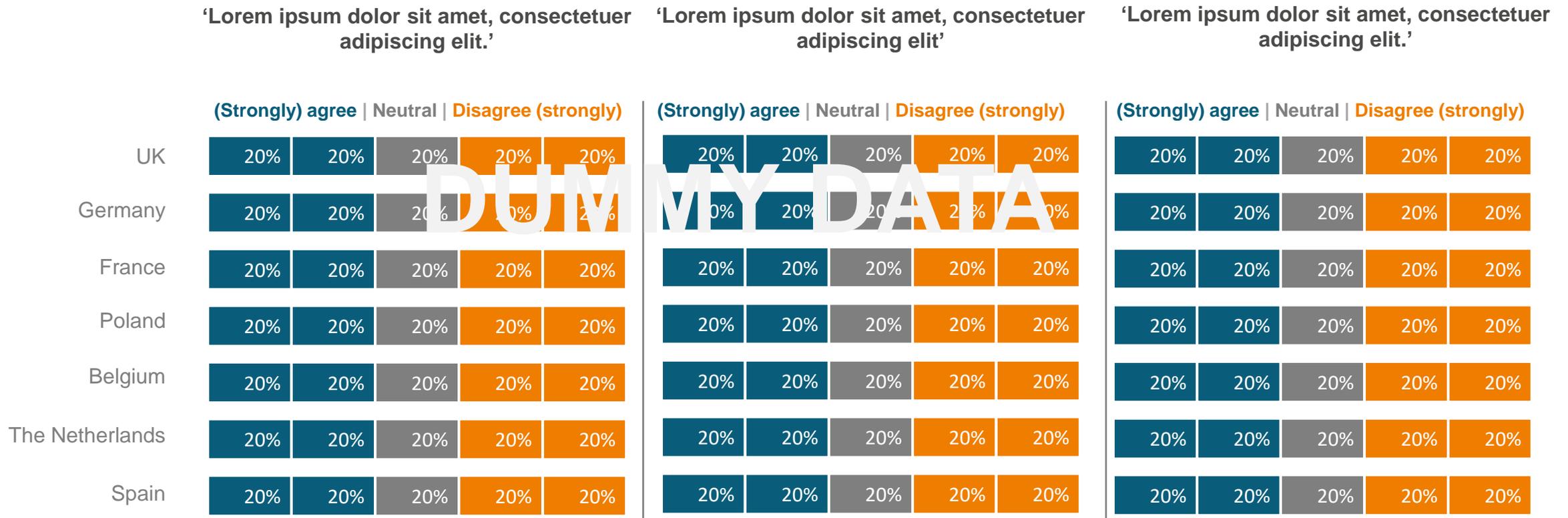
Q: In your opinion, what manufacturers are considered the best in class for smart solutions/ products in your sector? [Top-1]



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## Installers' sentiment

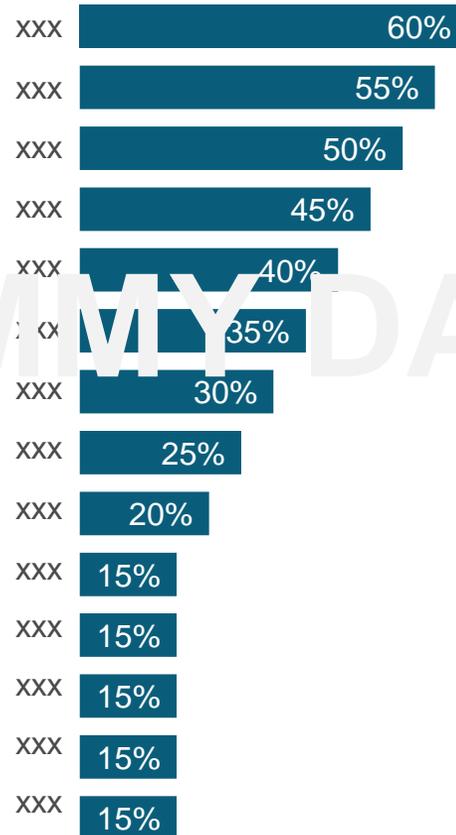
Q: To what extent do you agree with the following statements?



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### Installed smart building solutions

Q: Which of the following smart building solutions have you installed already?



DUMMY DATA

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### End users as drivers

Q: Which end user needs are driving you as an installer to recommend and apply smart solutions?



### Increasing demand in smart building solutions

Q: In the last couple of years, for which specific smart building solutions have you noticed an increasing demand?



DUMMY DATA

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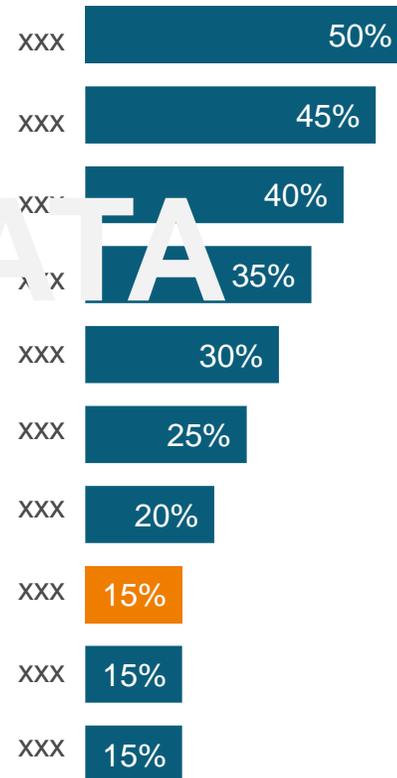
### Issues with installing smart products

Q: Have you ever had any issues when installing smart products, and what are the main issues you face?



### Products causing problems

Q: Which products in the smart system/ building cause normally the problems you face?



DUMMY DATA

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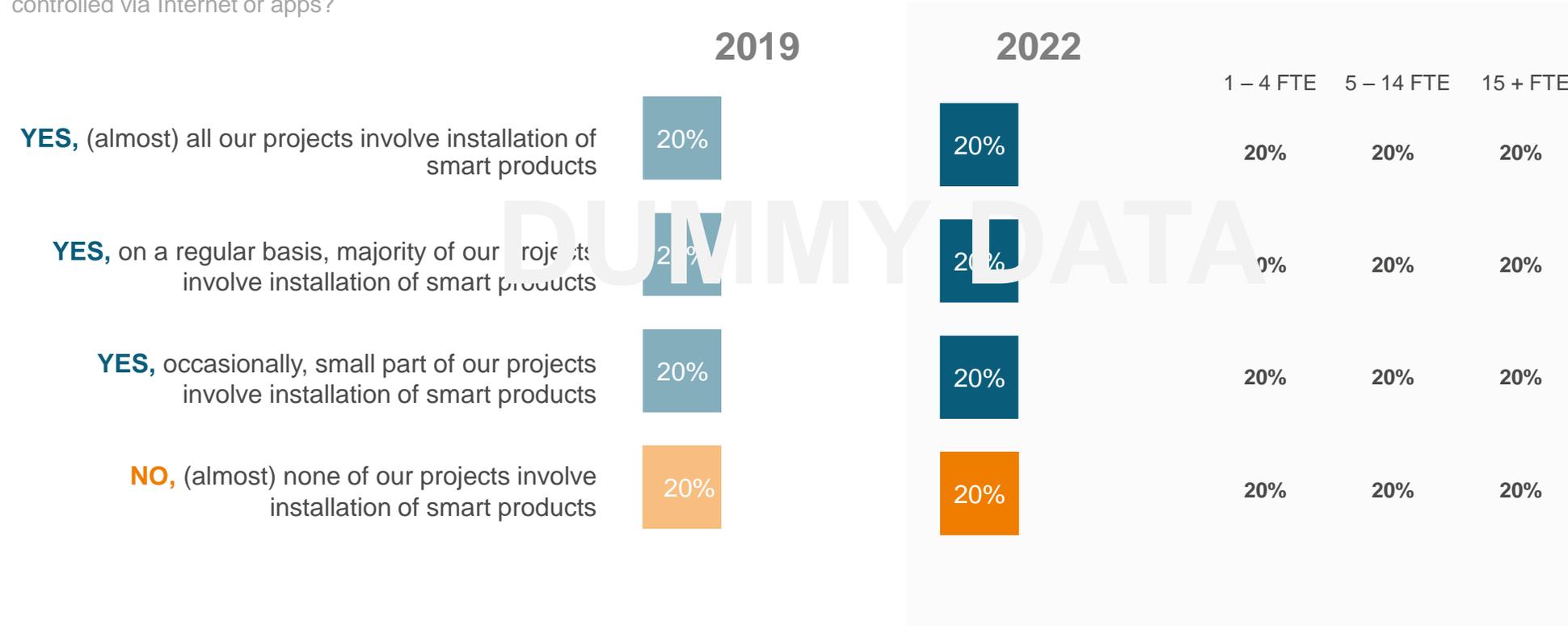
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### Smart products installations

Q: Is your company involved in the installation of smart products, which are connected to the Internet and can communicate with other products in the system, or can be controlled via Internet or apps?

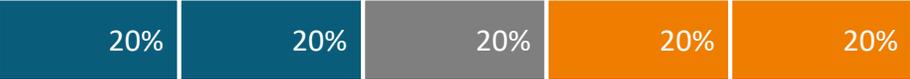


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## Smart product development of electrical installation industry

Q: The electrical installation industry is developing more and more products that are intelligent - have sensors, are connected to the Internet and are being controlled via apps. How do you feel about that development?

(Very) positive | Neutral | Negative (very) | Don't know



## The frontrunning industry

Q: In your opinion which of the following industries is the frontrunner in terms of home automation and smart products and buildings?

Electrical | Lighting | HVAC | Sanitary | Don't know



DUMMY DATA

## Request and demand from clients for home automation and smart products

Q: From your experience in the last years what is happening with the request and the demand from clients for home automation and smart products related to the following types of installations?

(Significantly) increasing | Remain the same | Decreasing (significantly) | Don't know



Base: n= 125, all installers

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### Demand for smart solutions in the future

Q: Will the demand for smart solutions/ connected products increase, decrease or remain the same in the future?

(Strong >25%) Increase 0-25% | Remain the same | Decrease | Don't know



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**XX%** installers are involved in home automation and installation of smart products



**XX%** is the share of smart-home-related installations/ activities in the daily assignments

**Bundled and combined products**

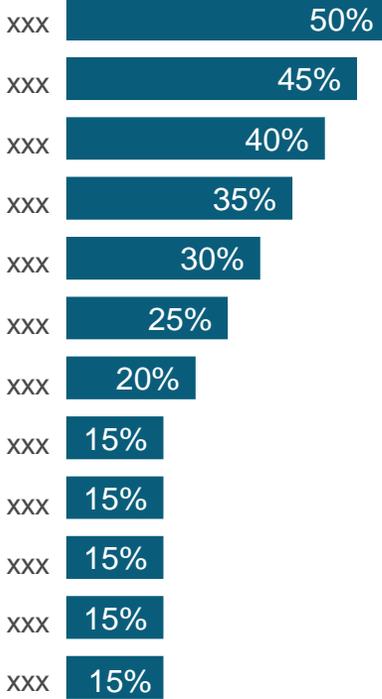
Q: When buying products for connected home (residential application) do you consider buying a bundled product from a single supplier or will you combine different products from different manufacturers that are compatible with your home automation system?

**Bundled products** | **Compatible products** | **Don't know**



**Installed smart building solutions**

Q: Which of the following smart building solutions have you installed already?



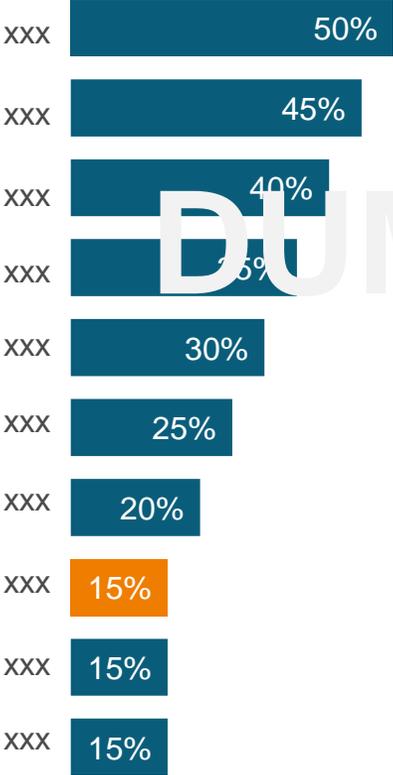
DUMMY DATA

Base: n= 98, if involved in the installation of smart products

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**End users as drivers**

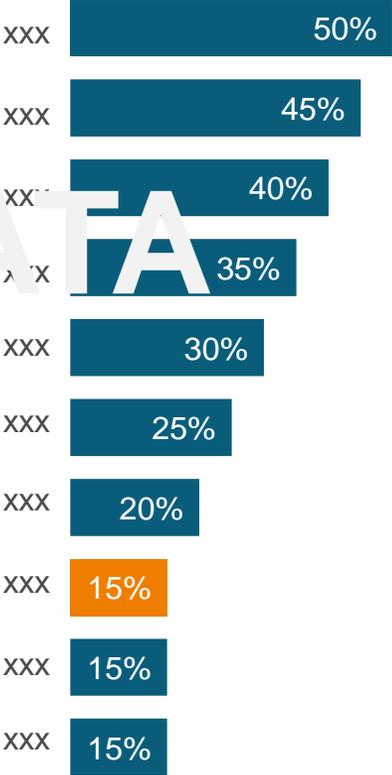
Q: Which end user needs are driving you as an installer to recommend and apply smart solutions?



Base: n= 98, if involved in the installation of smart products

**Increasing demand in smart building solutions**

Q: In the last couple of years, for which specific smart building solutions have you noticed an increasing demand?



Base: n= 125, all installers

# Lorem ipsum dolor sit amet, consectetur adipiscing elit.

## Issues with installing smart products

Q: Have you ever had any issues when installing smart products, and what are the main issues you face?



Base: n= 98, if involved in the installation of smart products

## Products causing problems

Q: Which products in the smart system/ building cause normally the problems you face?

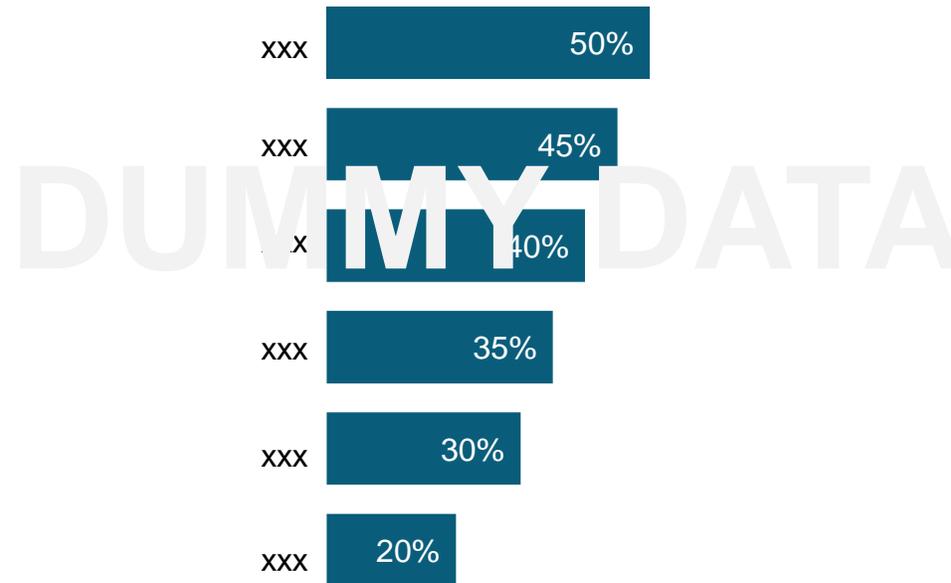


Base: n= 56, if have had issues with installations

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### Main reasons not to work with home automation and install smart products

Q: What are the main reasons not to work with smart products?



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### xxx% of installers have experience working with smart products remotely

#### Experience with working with smart products remotely

Q: What is your experience with working from distance with smart products?

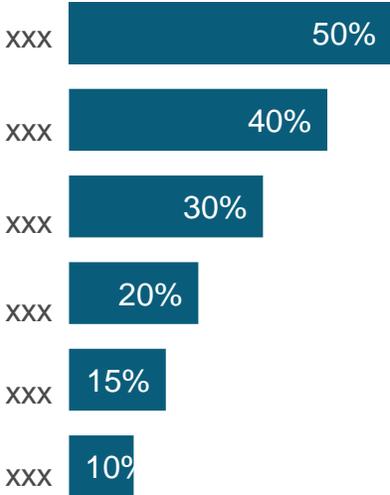
(Very) positive | Neutral | Negative (very) | Don't know



DUMMY DATA

### The most suitable professionals for installing smart home products

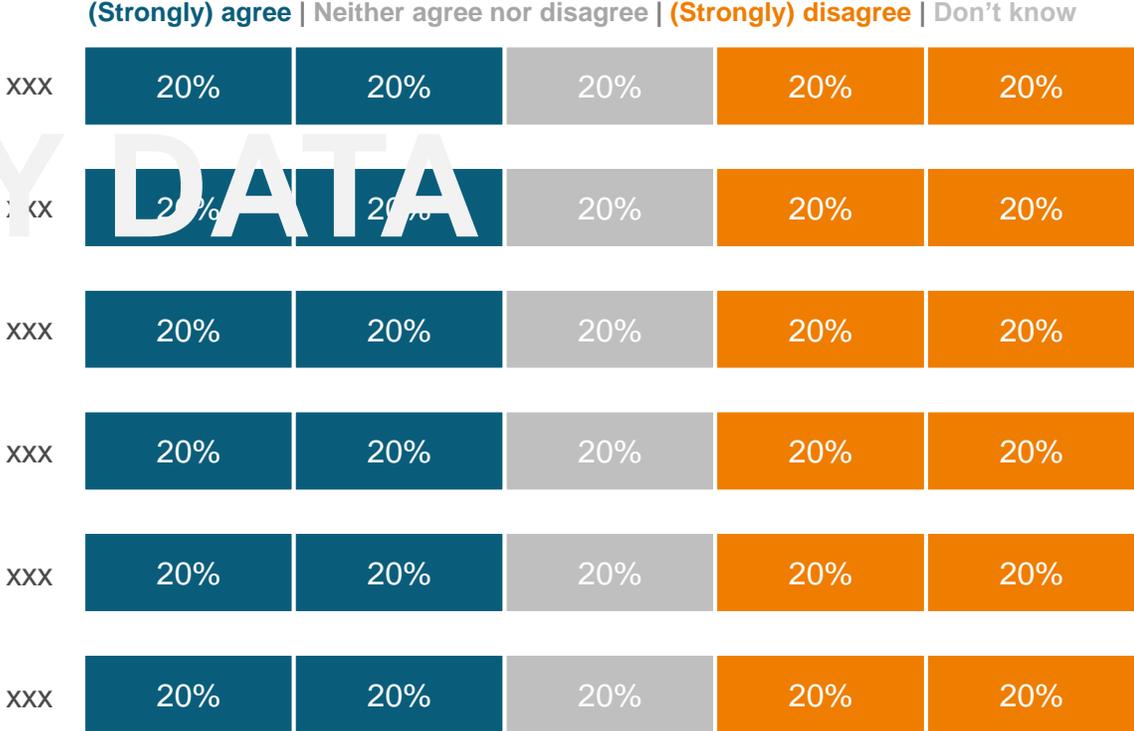
Q: In your opinion which professional group is the most suitable for installing smart products/ solutions?



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**Installers' sentiment**

Q: To what extent do you agree or disagree with any of the following statements. You can answer on a scale of 1 to 5, where 1 = Strongly disagree; 2 = Disagree; 3 = Neither agree, nor disagree; 4 = Agree; 5 = Strongly agree



Base: n= 63, all installers, randomized sample

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### The best class manufacturers (Top-5)

Q: In your opinion, what manufacturers are considered the best in class for smart solutions/ products in your sector

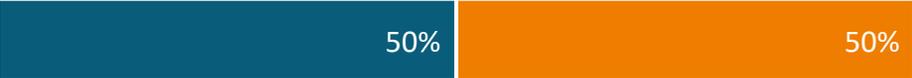


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### Manufacturers' improvement

Q: Would it be of interest for you to receive a push message via the app of the manufacturer if a product fails and needs to be serviced?

Yes | No



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# Respondents' background characteristics

## Job title of the interviewed respondents and the company size

Q: What is your position within the company?

Q: Yourself included, how many fulltime employees does your company have in total, in all branches?

	UK	Germany	France	Poland	Belgium	Netherlands	Spain
Owner / director / manager	50%	50%	50%	50%	50%	50%	50%
Project manager	50%	50%	50%	50%	50%	50%	50%
Engineer / designer	50%	50%	50%	50%	50%	50%	50%
Installer	50%	50%	50%	50%	50%	50%	50%
Calculator / work planner	50%	50%	50%	50%	50%	50%	50%
Purchaser	50%	50%	50%	50%	50%	50%	50%
1 - 4 FTE	50%	50%	50%	50%	50%	50%	50%
5 - 14 FTE	50%	50%	50%	50%	50%	50%	50%
15+ FTE	50%	50%	50%	50%	50%	50%	50%

Q2 2022 data, unweighted

# About USP

## USP Marketing Consultancy



Head office



Subsidiaries



Rotterdam



Düsseldorf Zagreb



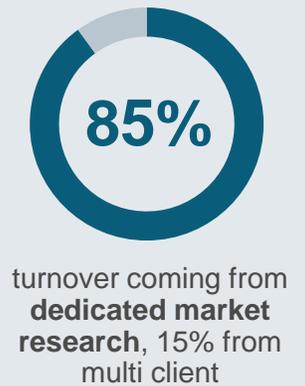
**Market specialist**  
 installation, construction, home improvement and real estate

Dedicated and multi-client research

**Active in the market for 29 years**

250+ dedicated market research projects annually

## Revenue distribution



Research in **31** countries in 2021



**43** focus groups



**1,778** in-depth interviews



**63,758** B2B CATI interviews



**54,850** B2C online interviews



# What we do

## Examples



**Segmentation**



**Customer  
journey**



**Branding**



**Concept/  
product  
research**



**Customer  
satisfaction**



**Trends**



**Distribution  
research**



**Market  
exploration**



**Pricing**



**Market  
size**



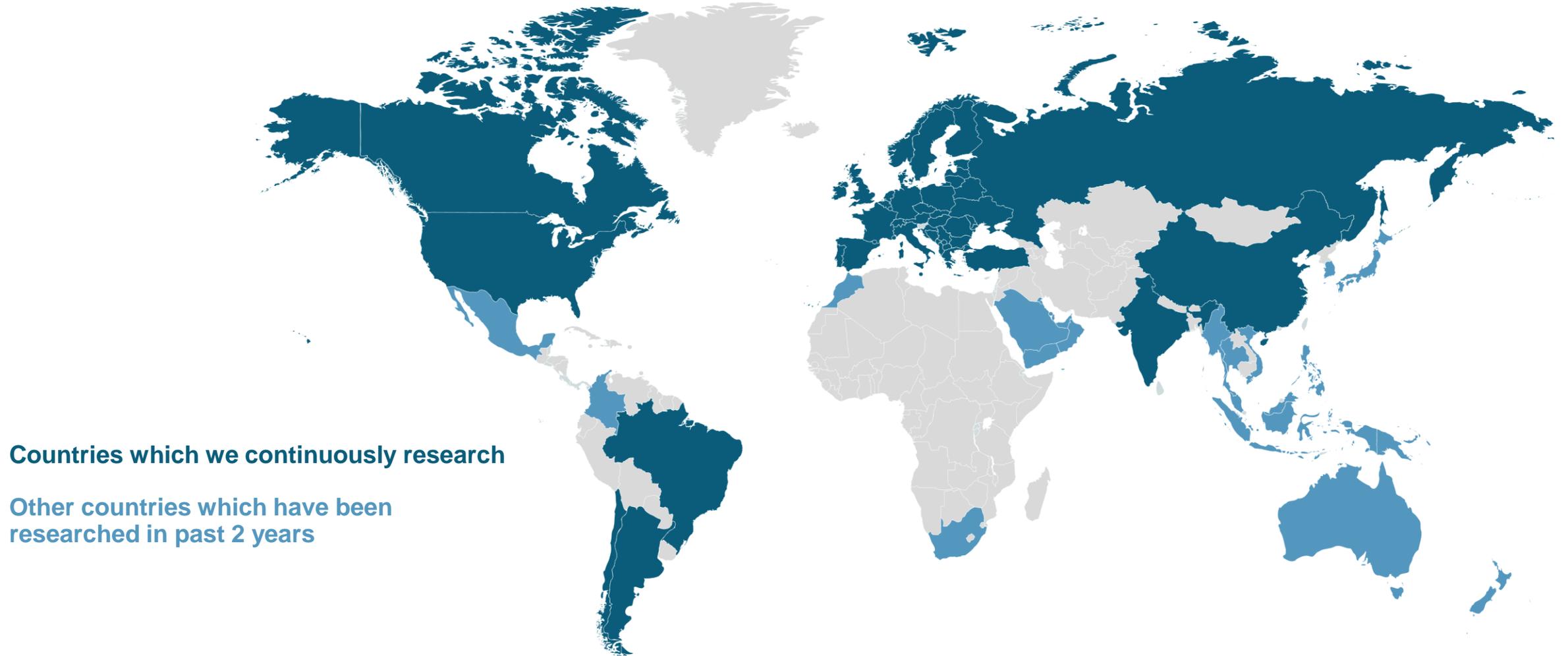
## Dedicated market research

- Tailor made
- Driven by your information needs
- Advice & consultancy based on facts and over 25 years of experience in the industry
- Worldwide coverage
- B2B, B2C, qualitative and quantitative research or a combination of both
- Within our market specialism, all types of researches can be conducted
- Targeting the right audience, with the right questions at the right time.

# Our multi-client research monitors

	European Architectural Barometer	European Contractor Monitor	European Mechanical Installation Monitor	European Electrical Installation Monitor	European Painter Insight Monitor	European Home Improvement Monitor
<b>Target group</b>	Architects	Building contractors	HVAC installers	Electrical installers	Professional painters	Consumers
<b>Methodology</b>						
<b>Annual sample size</b>	3,400 interviews	2,050 interviews	2,600 interviews	3,000 interviews	2,300 interviews	26,400 interviews
<b>Country scope</b>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> <li>• Spain</li> <li>• Italy</li> </ul>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> <li>• Spain</li> <li>• Italy</li> </ul>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> </ul>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> <li>• Spain</li> </ul>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> <li>• Spain</li> <li>• Italy</li> <li>• Denmark</li> <li>• Sweden</li> </ul>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> <li>• Spain</li> <li>• Italy</li> <li>• Denmark</li> <li>• Sweden</li> <li>• Austria</li> </ul>
<b>Way of reporting</b>	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly
<b>2022 Theme topics</b>	<ul style="list-style-type: none"> <li>• Q1: Sustainability</li> <li>• Q2: Trends in material usage</li> <li>• Q3: Decision making</li> <li>• Q4: Brand health scan</li> </ul>	<ul style="list-style-type: none"> <li>• H1: Prefabrication</li> <li>• H2: Digitalisation and BIM</li> </ul>	<ul style="list-style-type: none"> <li>• Q1: Digitalisation and BIM</li> <li>• Q2: Prefabrication</li> <li>• Q3: Smart buildings and products</li> <li>• Q4: Media orientation</li> </ul>	<ul style="list-style-type: none"> <li>• Q1: Sustainability</li> <li>• Q2: Smart buildings and products</li> <li>• Q3: Services in the installation market</li> <li>• Q4: Brand health scan</li> </ul>	<ul style="list-style-type: none"> <li>• Trend tracking</li> <li>• Sustainability</li> <li>• Labour shortage</li> <li>• Online buying</li> <li>• Media orientation</li> </ul>	<ul style="list-style-type: none"> <li>• Q1: Orientation; rise of digital natives</li> <li>• Q2: Purchase Channels; online leaders</li> <li>• Q3: Brand health check</li> <li>• Q4: DIY vs DIFM; outsourcing jobs</li> </ul>

# We are active globally



**Countries which we continuously research**

**Other countries which have been researched in past 2 years**

# Principals of USP

Installation				DIY		Construction	
		<b>GIRA</b>				<b>ASSA ABLOY</b>	
							
			<b>KALDEWEI</b>				<b>FESTOOL</b>
	<b>Panasonic</b>		<b>uponor</b>				<b>Interface</b>
<b>VIESMANN</b>							
							
							

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