



REPORT IMPRESSION
European Electrical Installation Monitor Q1-2021
Theme topic: Media orientation
May-2021

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About European Electrical Installation Monitor

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Business development

Theme topic – Media orientation

Cross country summary

United Kingdom

Germany

France

Poland

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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 825 phone interviews (per quarter) with registered electrical installation companies, divided over the 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 2021:

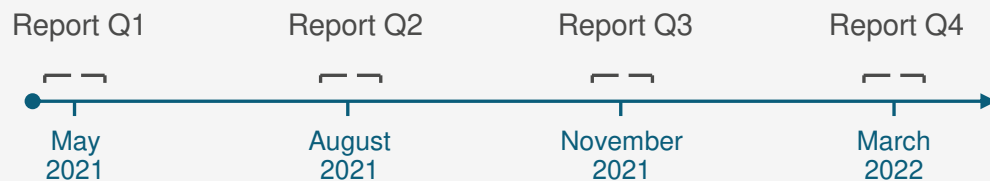
Q1: Media orientation

Q2: Training needs pre- & post- COVID-19

Q3: BIM

Q4: Purchase channels

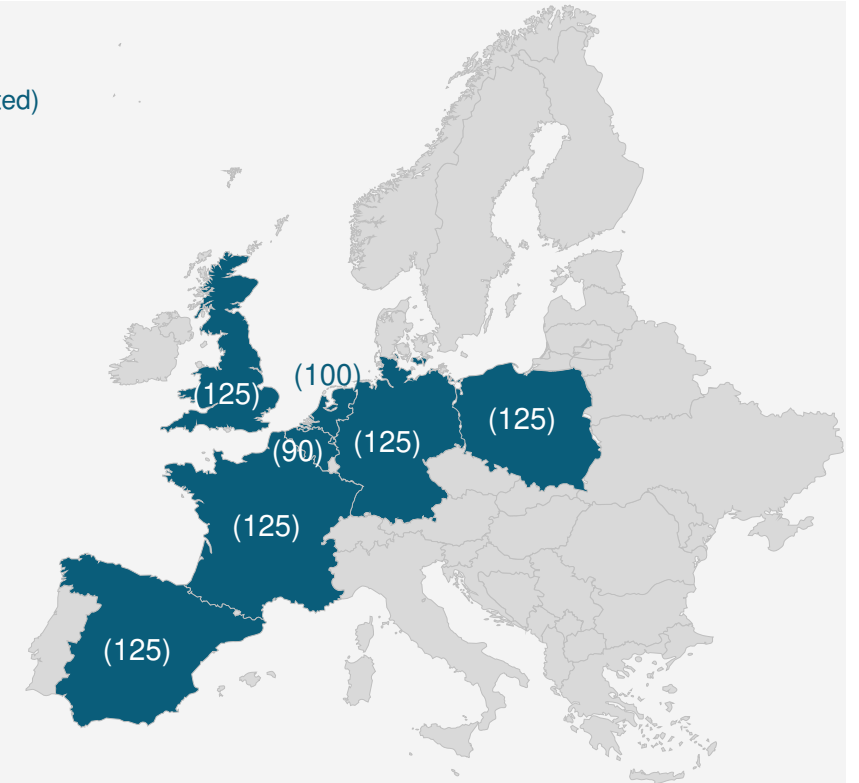
THE TIMELINE



COUNTRY SCOPE

(number of interviews conducted)

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



PROJECT TEAM



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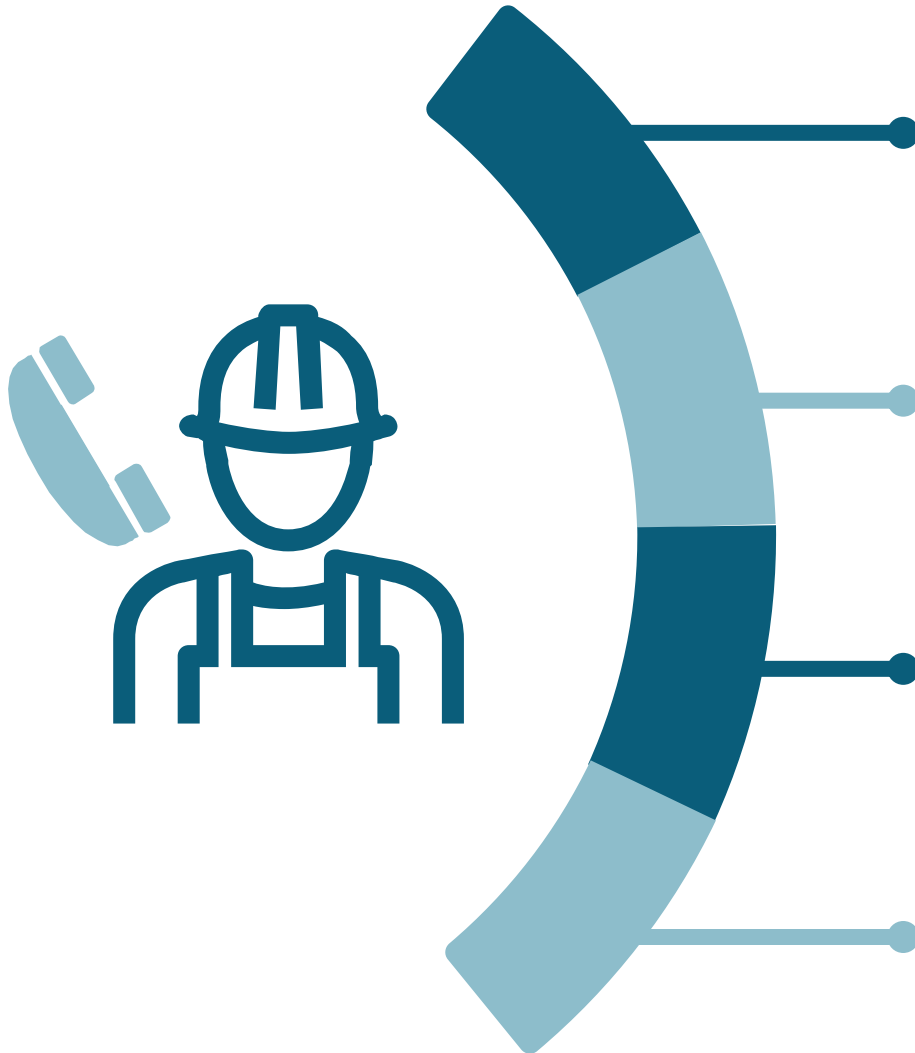
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About target group & methodology



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.

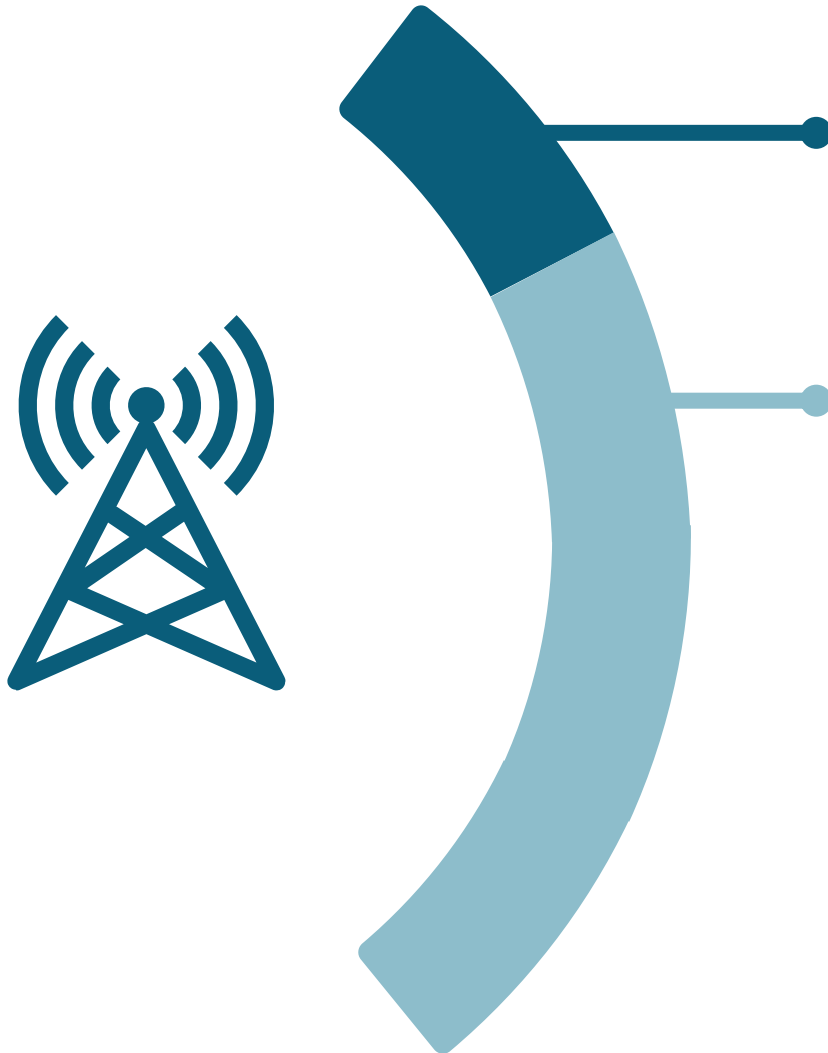
... through phone interviews, by native-speaking agents

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 Q1 theme topic



Surveying the media orientation topic...

It is important to allocate your marketing & communication budgets in the right and most efficient way. The Q1 theme topic 'media orientation' helps to understand (1.) via what channels installers can be reached best, (2.) installers' behaviour and preferences regarding media usage and (3.) the influences of upcoming social media.

...allows for better understanding how your marketing & communication can reach installers best

To provide insights into installers' media orientation, we looked at this topic from various angles and mapped out:

- Which (types of) media sources are used by installers and how that developed over time;
- The most useful information sources for installers;
- Visiting (virtual) trade shows;
- Changes in digital media usage during COVID-19;
- Most important types of websites and what installers search on those websites;
- Zooming in on the usage of apps & digital tools and social media etc.

Report impression



Questionnaire



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Key takeaways

1

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

Media orientation in the installation sector

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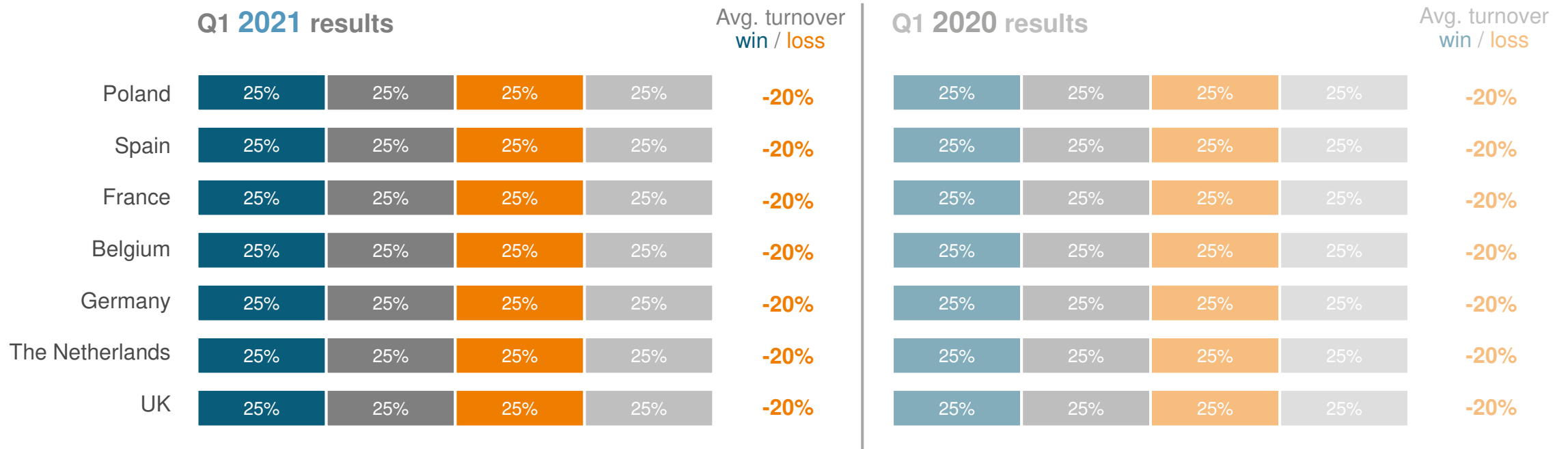
DUMMY DATA

The effect of COVID-19 on the turnover

Q: Do you expect that the Corona virus will impact your turnover this year?

Q: How much turnover, in percentages, do you expect to win/ lose compared to your initial budget for **2021** / **2020** due to the Corona virus?

Turnover will grow | No impact | Turnover will decrease | Don't know



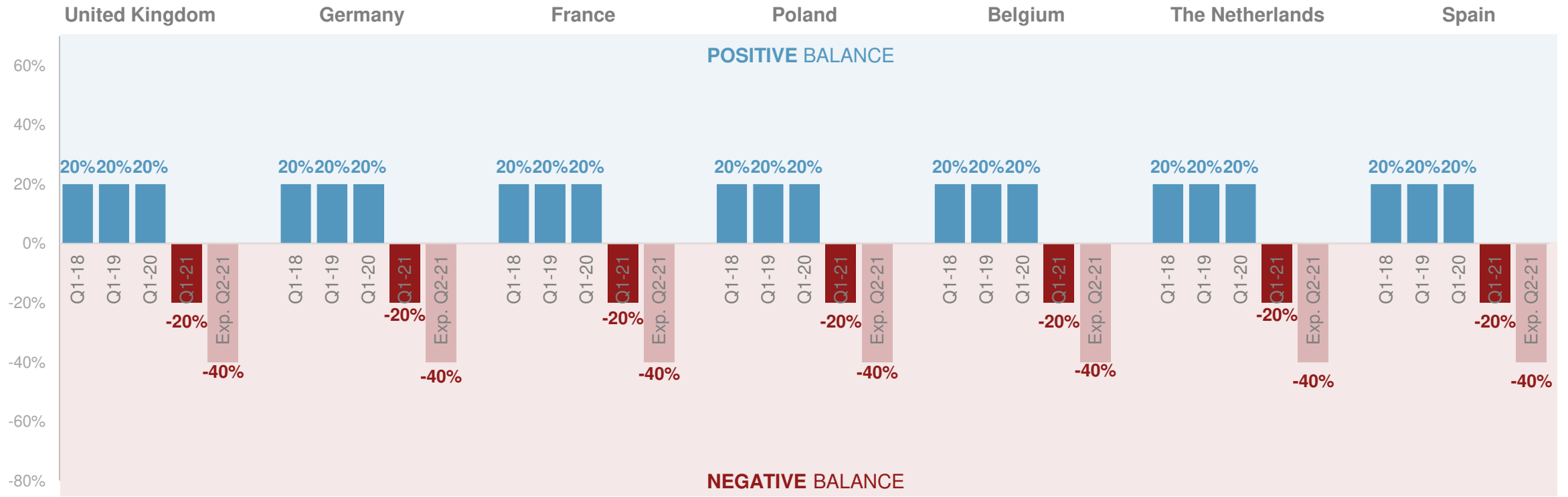
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DUMMY DATA

Turnover balance

Q: If you compare your turnover of Q1-21 to the same quarter last year, how did your turnover develop?

(% INCREASE minus % DECREASE)

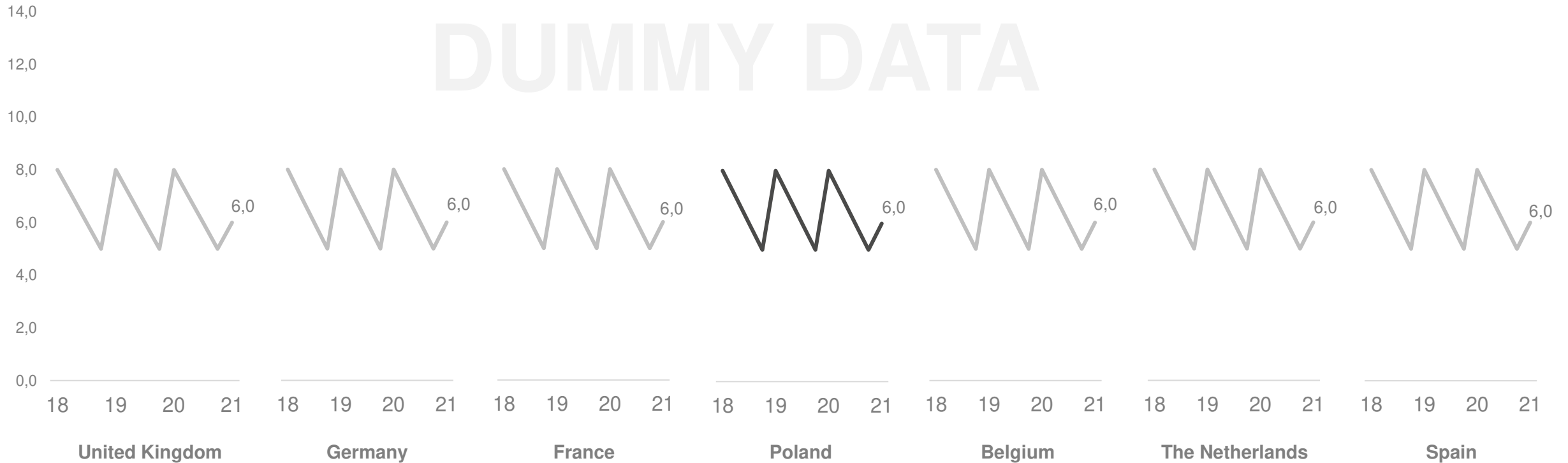


Important: The 2020 and 2021 data was obtained while governmental Covid-19-related restrictions were in effect in the respective countries.

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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)



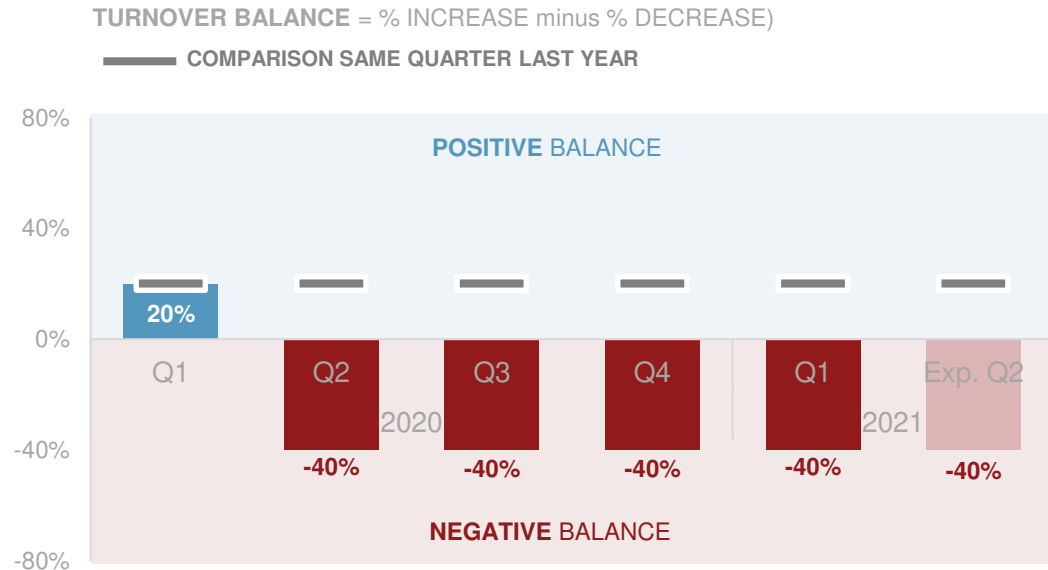
Important: The 2020 and 2021 data was obtained while governmental Covid-19-related restrictions were in effect in the respective countries.

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DUMMY DATA

Turnover balance

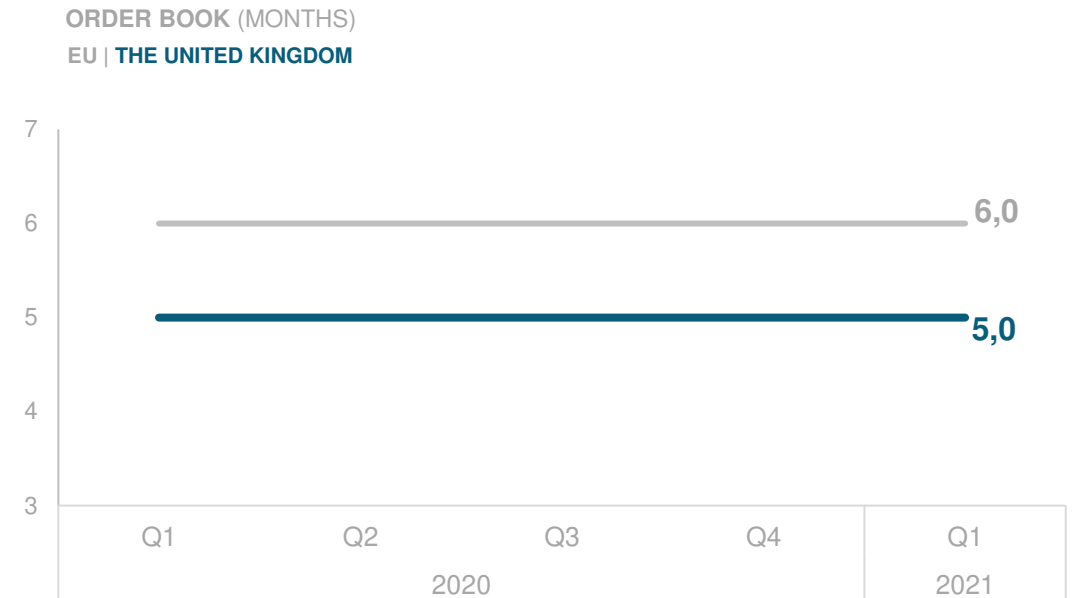
Q: If you compare your turnover of Q1-21 to the same quarter last year, how did your turnover develop? What are your expectations for the development in Q2-21?



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

Order book portfolio

Q: How big is your current order book portfolio?



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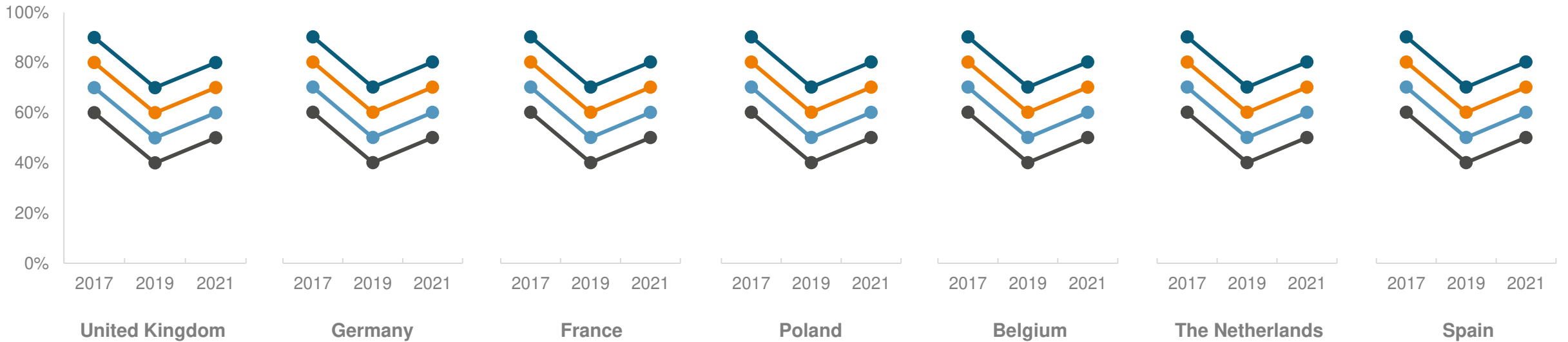


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DUMMY DATA

Media usage over time

Traditional | Personal | Digital | Social



Base: All

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DUMMY DATA

Media usage intensity

	Avg. number of different types of media used	Share of installers using all four types of media
UK	2.0	50%
Germany	2.0	50%
France	2.0	50%
Poland	2.0	50%
Belgium	2.0	50%
The Netherlands	2.0	50%
Spain	2.0	50%


Base: All

ZOOMING IN ON FTE:



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ZOOMING IN ON AGE:

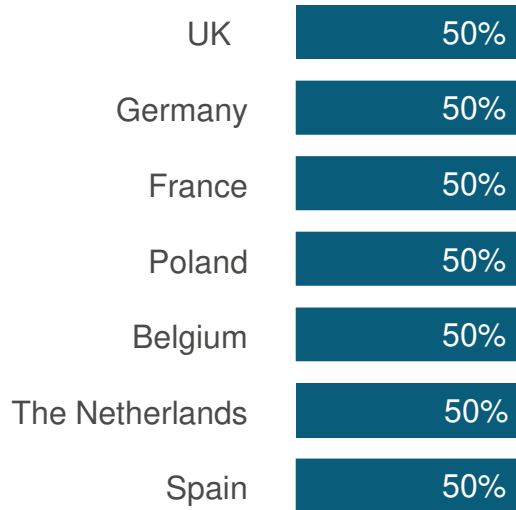


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DUMMY DATA

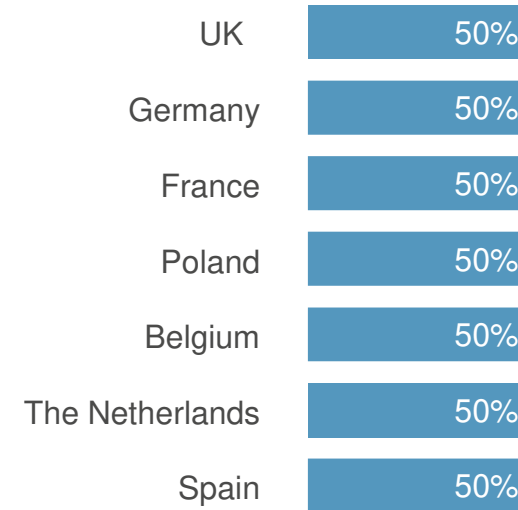
Expect to visit **traditional trade shows** again, when the situation with COVID-19 is stabilised



Base: Asked if visiting trade shows

If not, this mainly is because ...

Participated in any **virtual trade shows**



Base: All

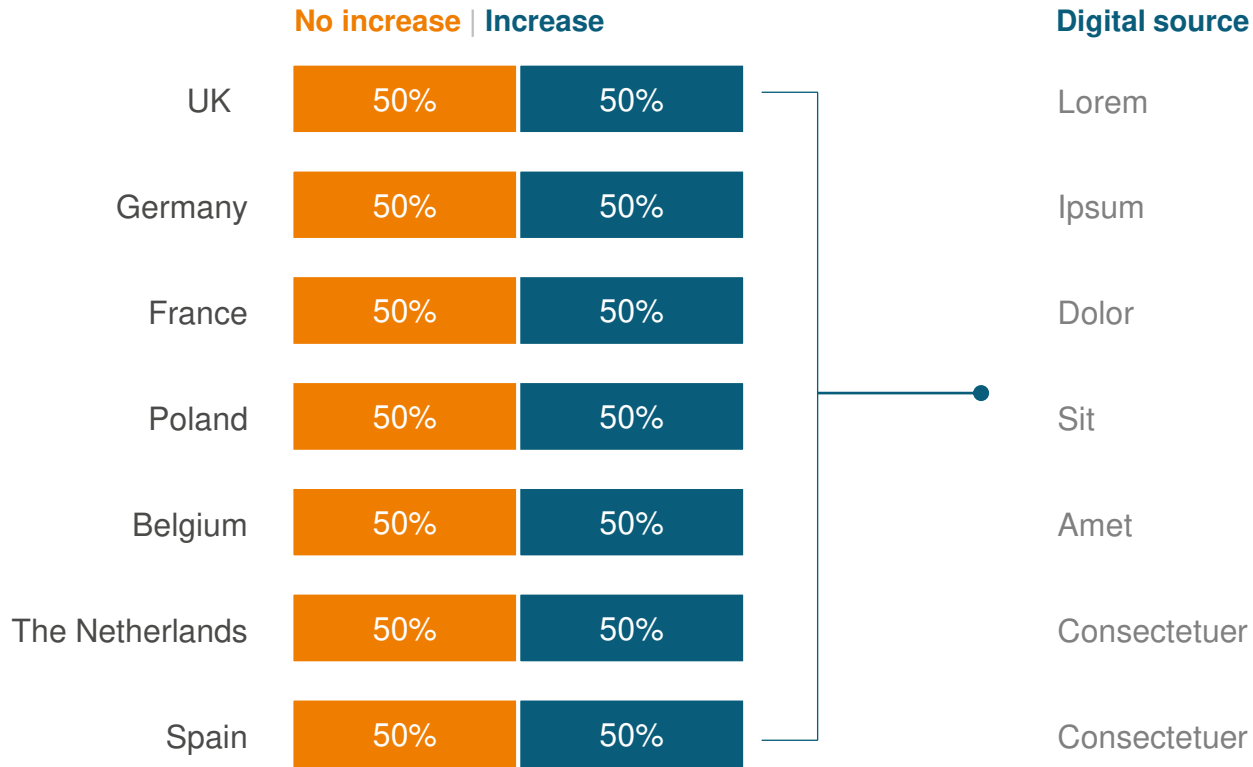
If participated, in general the experiences were...

If the experiences were **negative**, this mainly had to do with...

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DUMMY DATA

Increase in digital media usage during COVID-19



Base: All

ZOOMING IN ON
AGE:

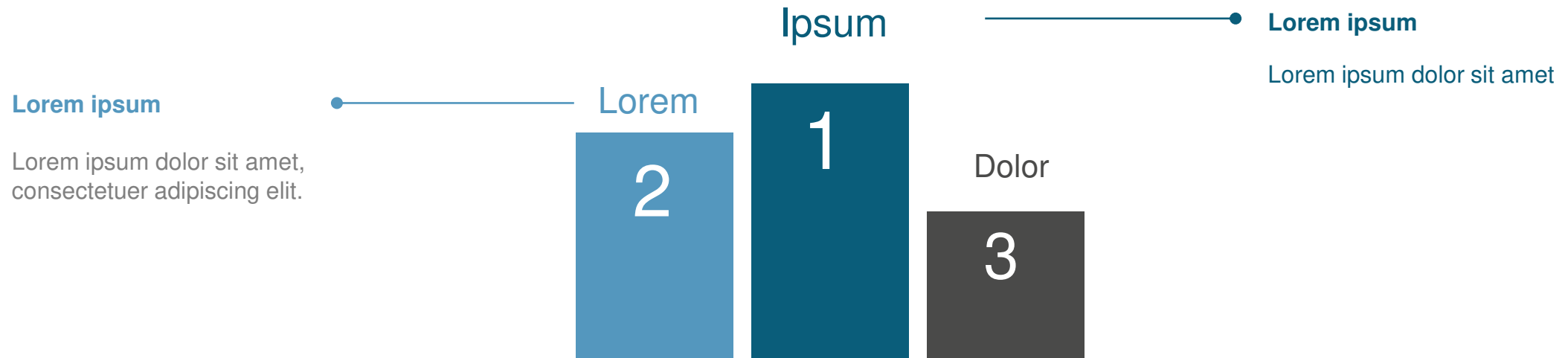


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DUMMY DATA

Most used types of websites

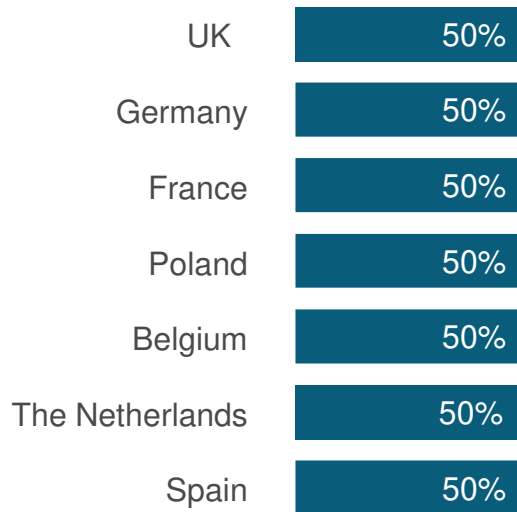


Base: Asked if searching on the internet

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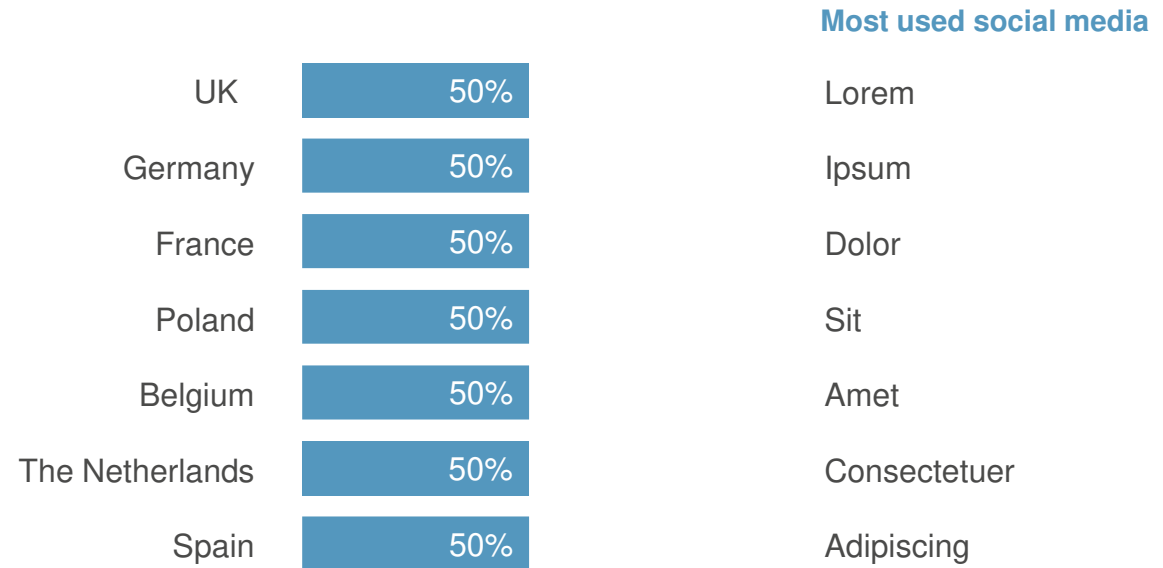
DUMMY DATA

Use **apps & digital tools** for professional purposes



Base: All

Use **social media** for professional purposes



Base: All

ZOOMING IN ON
AGE:

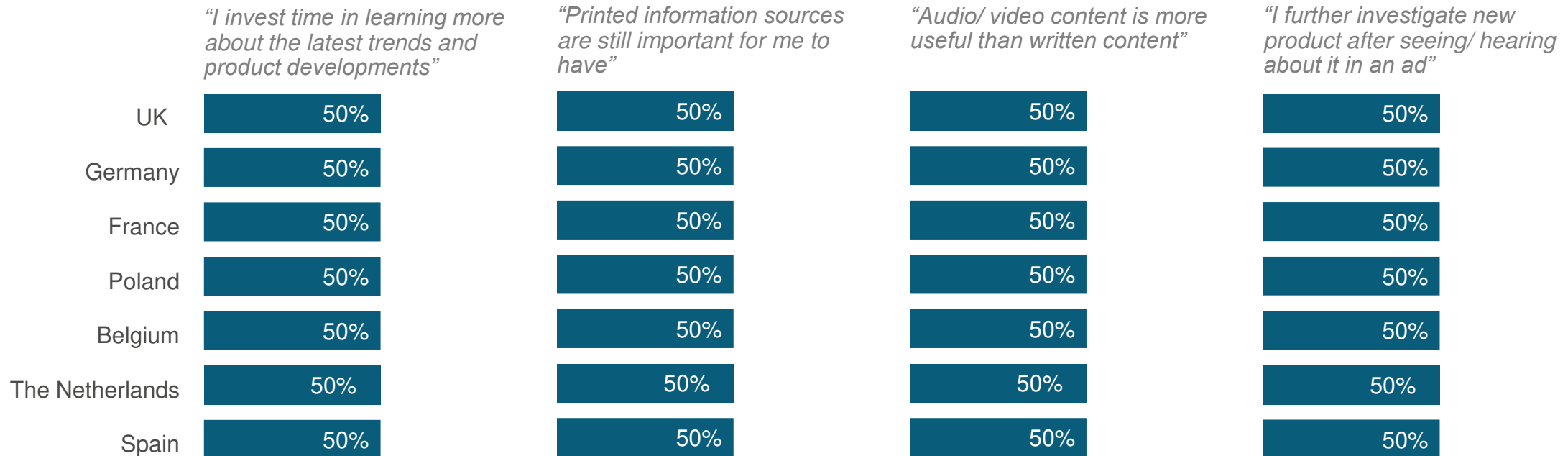
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DUMMY DATA

Orientation behaviour & preferences

% (strongly) agree



Base: All

Deeper insights into orientation behaviour & preferences

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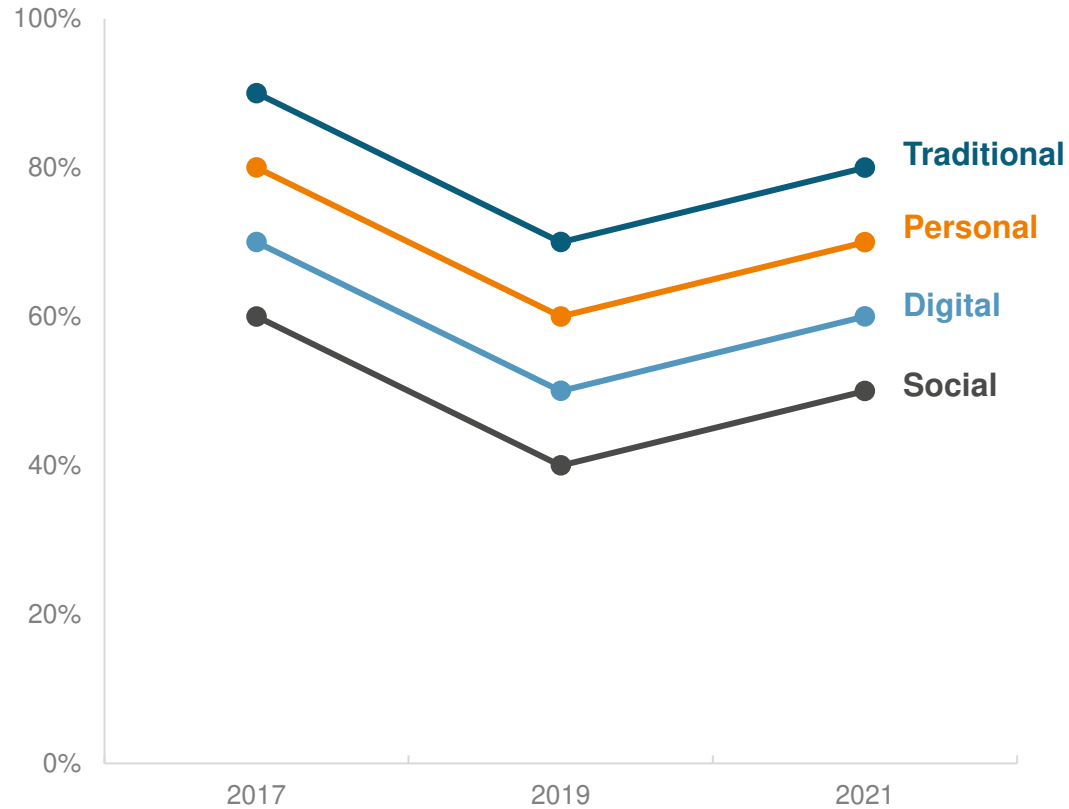
Appendix



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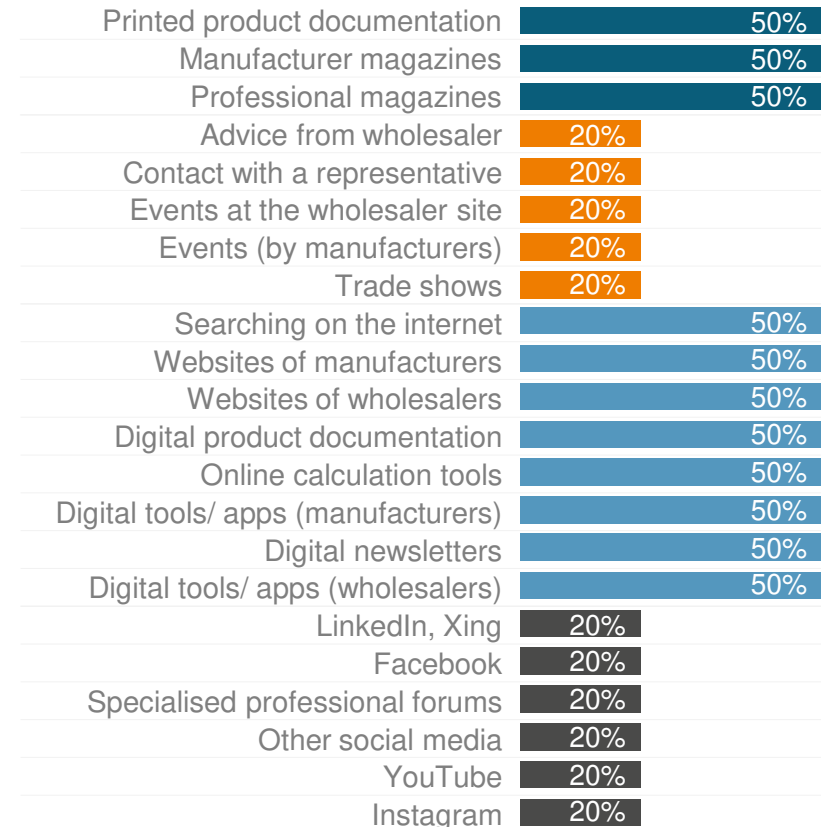
DUMMY DATA

Media sources over time *



Media sources in 2021

Q: To what degree do you use the following information sources for professional purposes? [sometimes + often]



Base: n=125, all

* More in-depth information about media sources over time can be found in the [appendix](#)

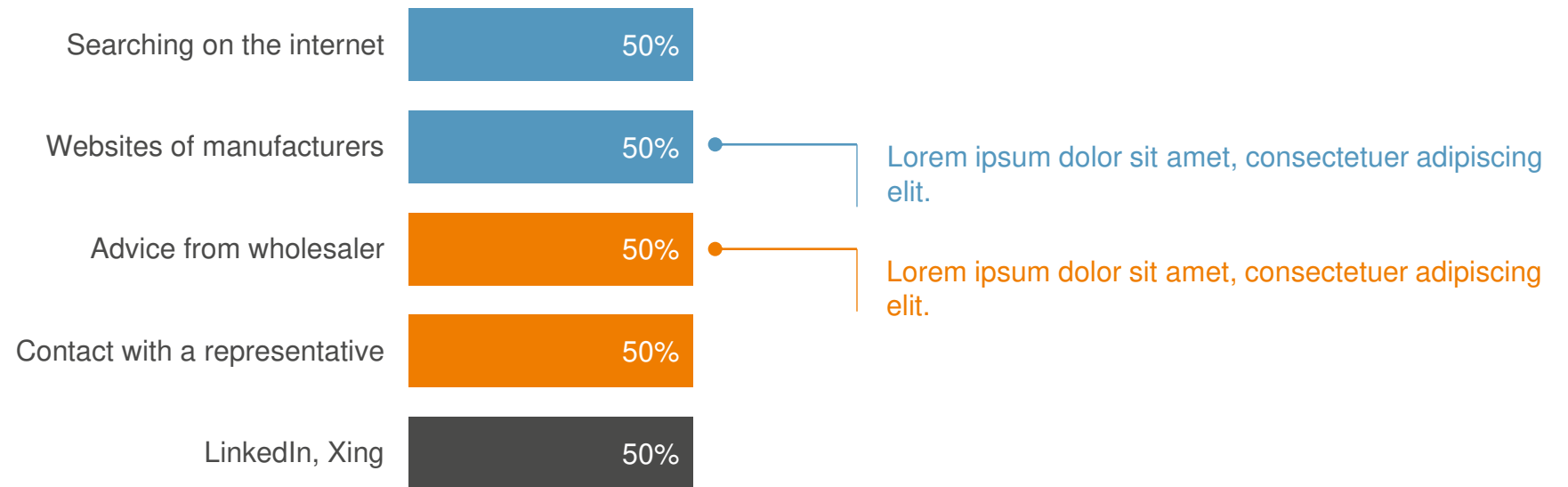
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DUMMY DATA

Most useful information sources – top 5

Q: Of all the information sources you use, which is the most useful one?

Traditional | Personal | Digital | Social



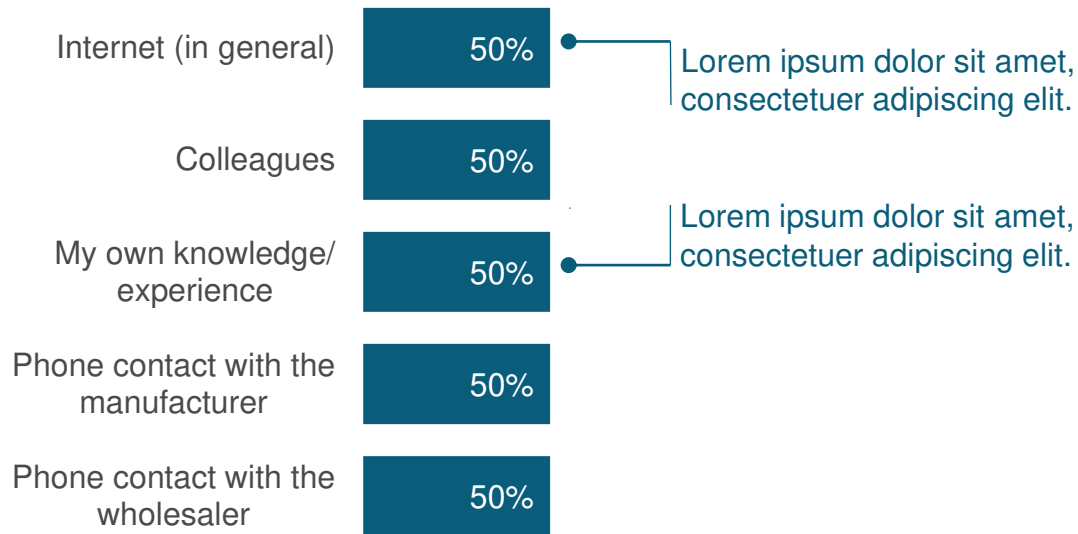
Base: n=125, all

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DUMMY DATA

Main information sources in field – top 5

Q: What are your main sources of information when you are in the field, for example at the construction or service site?

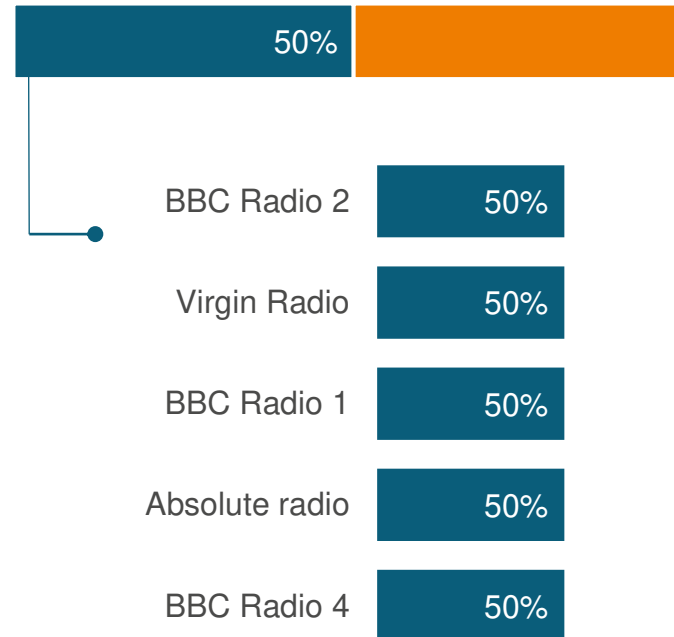


Base: n=..., If working in the field

Radio stations listened to – top 5

Q: Do you listen to the radio while you are at work, and if yes, which radio station do you listen to most of the time?

LISTENING TO THE RADIO



Of all installers who listen to the radio, 50% do not further investigate new products after hearing about it in an ad.

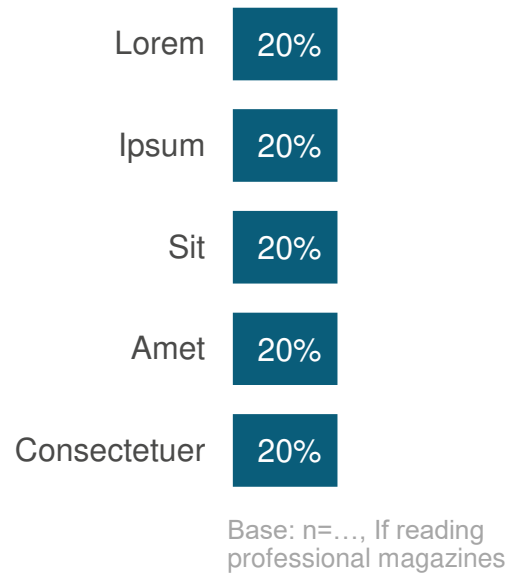
Base: n=125, all

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DUMMY DATA

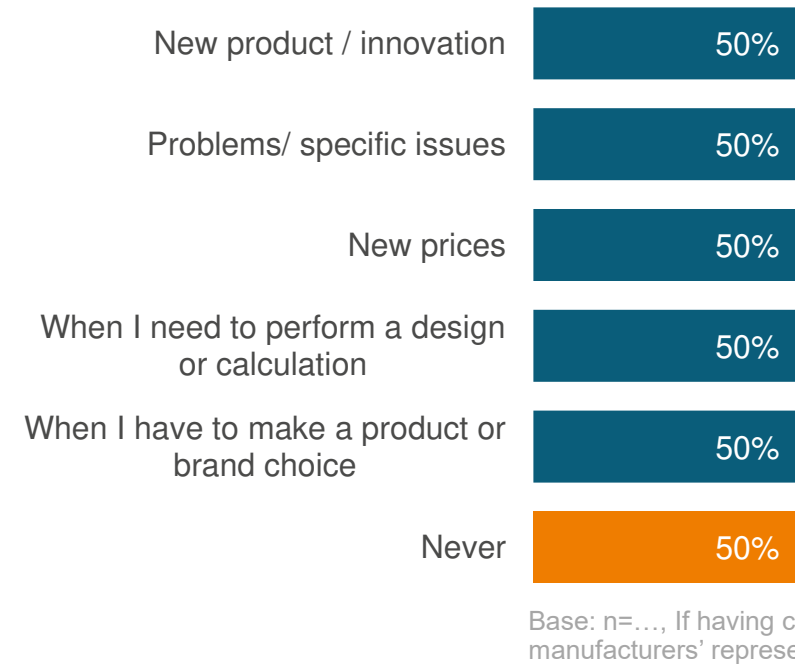
Professional magazines read – top 5

Q: Which professional magazines do you read?



Contact with manufacturers' representatives – top 5

Q: In what cases do you appreciate if a representative of the manufacturer contacts you?



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DUMMY DATA

Traditional trade shows

50%

expect to visit trade shows in the coming years, when the situation with **COVID-19 is stabilised** and events are again being organized.

Base: n=..., If visiting trade shows

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Virtual trade shows

Only 50%

did participate to any **virtual trade shows**.

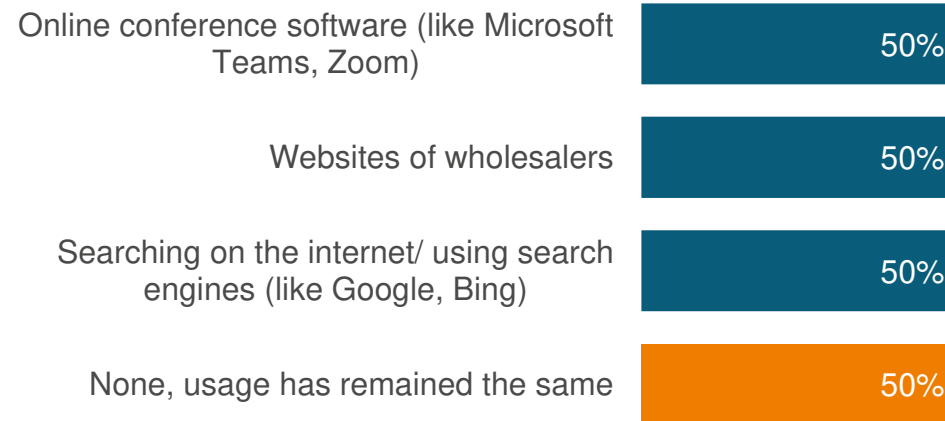
Base: n=125, all

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DUMMY DATA

Changes in digital information sources – top 3

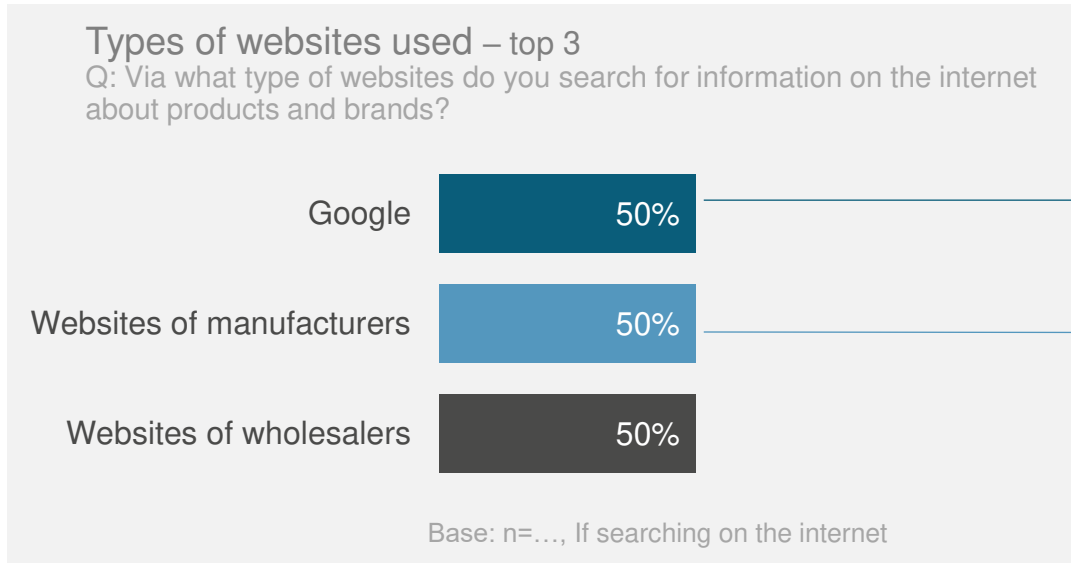
Q: During the COVID-19 the usage of digital information sources has increased. Which of the digital information sources have you been using more in your job compared to before the crisis?



Base: n=125, all

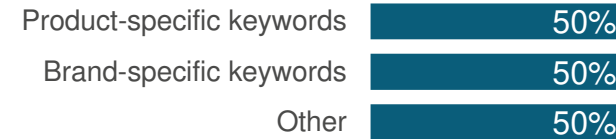
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DUMMY DATA



Google search behaviour

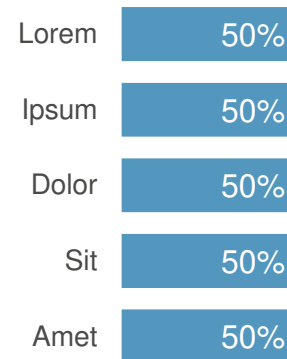
Q: When using Google, do you mainly look for product-specific keywords, brand-specific keywords or something else?



Base: n=..., if using Google

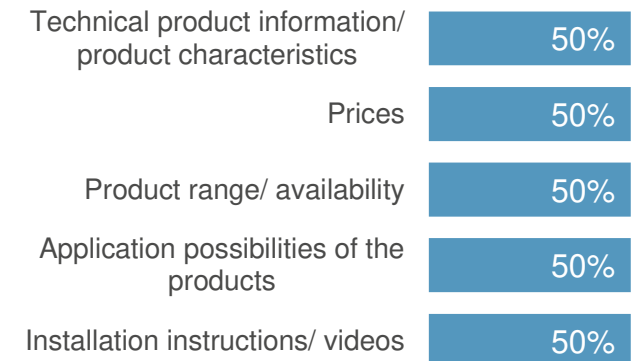
Manufacturers' websites visited – top 5

Q: Could you please name the websites of manufacturers you visit when searching for information about products and brands?



Preferred type of information on manufacturers' websites – top 5

Q: What type of information would you like to find on the website of a manufacturer?



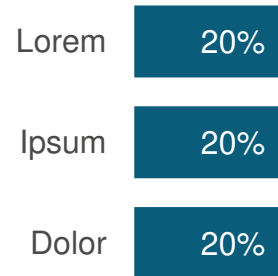
Base: n=..., If visiting manufacturers' websites

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DUMMY DATA

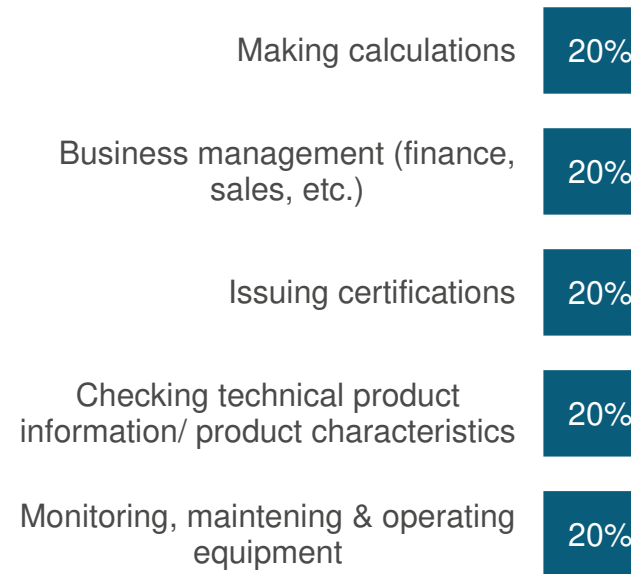
20% use **apps & digital tools** for **professional purposes**

Used apps & digital tools – top 3
Q: Can you mention which apps & digital tools do you use regularly for professional purposes?



Base: n=..., If using apps & digital tools

Reasons for using apps & digital tools – top 5
Q: What do you use the apps & digital tools for?



Base: n=..., If using apps & digital tools

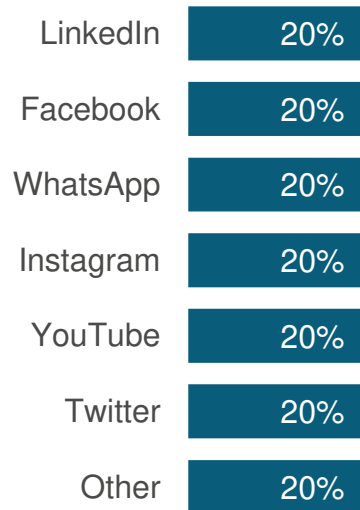
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DUMMY DATA

Installers on average spend **2.0 hours** per week on **social media** for professional purposes

Used social media for professional purposes

Q: Which social media do you use for professional purposes?



WHEN USING WhatsApp

Communicate with...
... manufacturers: 20%
... wholesalers: 20%

Base: n=..., If using social media for professional purposes

Reasons for using social media for professional purposes – top 5

Q: In what situations do you use social media for professional purposes?



Base: n=..., If using social media for professional purposes

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DUMMY DATA

Orientation behaviour & preferences

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

(STRONGLY) AGREE | NEUTRAL | (STRONGLY) DISAGREE | DON'T KNOW



Base: n=125, all

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Respondents' background characteristics

DUMMY DATA

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%
Purchaser	50%	50%	50%	50%	50%	50%	50%
Calculator / work planner	50%	50%	50%	50%	50%	50%	50%
Project manager	50%	50%	50%	50%	50%	50%	50%
Installer	50%	50%	50%	50%	50%	50%	50%
Sales	50%	50%	50%	50%	50%	50%	50%
Engineer / designer	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%

Questionnaire – theme questions

- To what degree do you use the following information traditional sources for professional purposes?
- To what degree do you use the following personal contacts, for choosing products and brands you will use?
- To what degree do you use the following digital media sources for professional purposes?
- To what degree do you use the following social media for professional purposes?
- Of all the information sources you use, which is the most useful one?
- What are your main sources of information when you are in the field, for example at the construction or service site? Please also let us know if you do not go into the field.
- Which professional magazines do you read?
- In what cases do you appreciate if a representative of the manufacturer contacts you?
- If the situation with the COVID-19 is stabilized and events are again being organized, do you expect to visit trade shows in the coming years?
- Why do you expect not to visit trade shows in the coming years?
- Did you participate to any virtual trade shows?
- Was your experience with virtual trade show(s) positive or negative?
- Why positive / negative?

Questionnaire – theme questions

- During the COVID-19 the usage of digital information sources has increased. Which of the digital information sources have YOU been using more in your job compared to before the crisis?
- Via what type of websites do you search for information on the internet about products and brands?
- When using Google, do you mainly look for product-specific keywords, brand-specific keywords or something else?
- Could you please name the websites of manufacturers you visit when searching for information about products and brands?
- What type of information would you like to find on the website of a manufacturer?
- Which social media do you use for professional purposes?
- On average per week, how much time do you spend on social media for professional purposes? Please answer in hours.
- In what situation do you use social media for professional purposes?
- Do you use WhatsApp to communicate with manufacturers, for example with the service team, sales representatives, etc.?
- And do you use WhatsApp to communicate with wholesalers?
- Do you use Apps & Digital tools for professional purposes?
- Can you mention which Apps & Digital tools do you use regularly for professional purposes?
- What do you use the Apps & Digital tools for?

Questionnaire – theme questions

- To what extent do you agree or disagree with the following statements?
 - I invest time in learning more about the latest trends and product developments
 - Printed information sources are still important for me to have
 - Audio/ video content is more useful than written content
 - I further investigate new product after seeing/ hearing about it in an ad
- Do you listen to the radio while you are at work, and if yes, which radio station do you listen to most of the time?

About USP

USP Marketing Consultancy



Head office



Subsidiary



Rotterdam



Düsseldorf



Market specialist
installation, construction, home improvement and real estate

Dedicated and multi-client research

Active in the market for over 25 years

230+ dedicated market research projects annually

Revenue distribution



Research in **34** countries annually



78 focus groups



1,162 in-depth interviews



58,653 B2B CATI interviews



56,750 B2C online interviews



What we do

Examples



Segmentation



**Customer
journey**



Branding



**Concept/
product
research**



**Customer
satisfaction**



Trends



**Distribution
research**



**Market
exploration**



Pricing



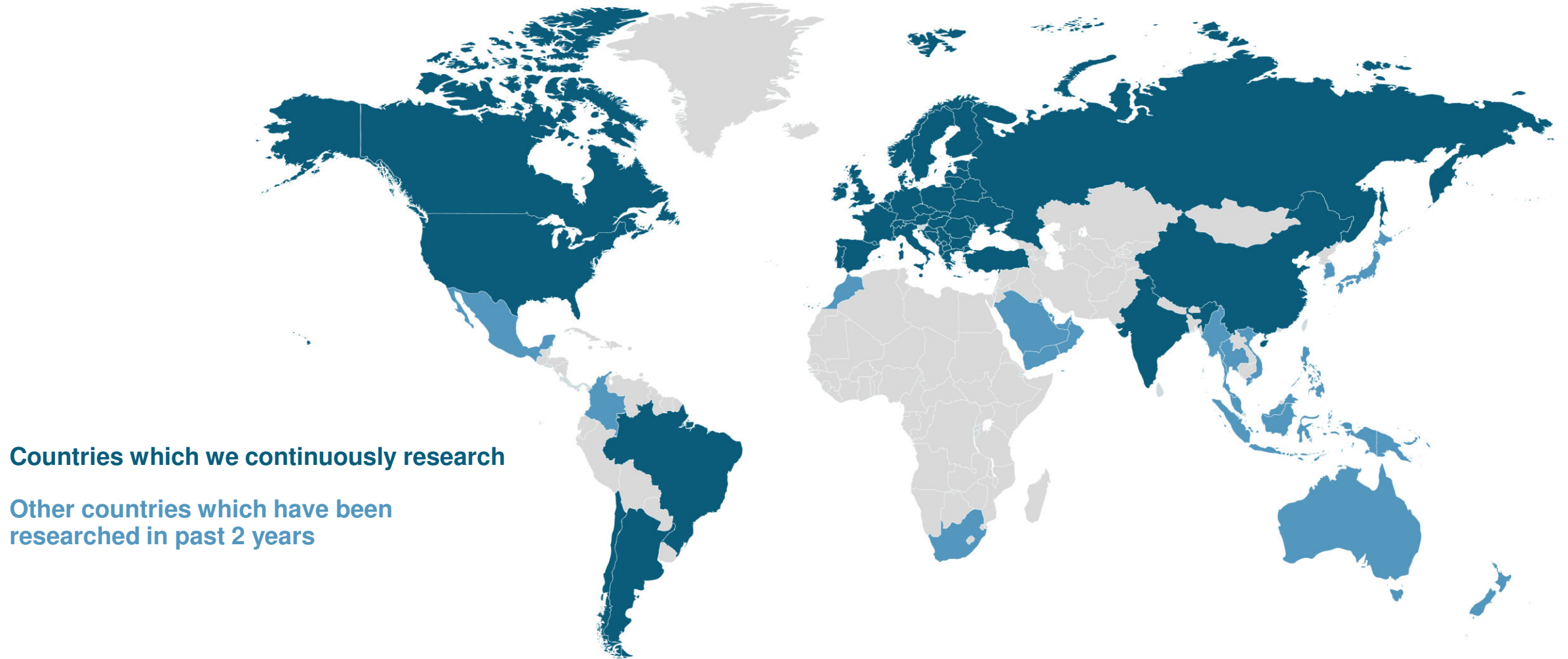
**Market
size**



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.

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	
		GIRA				ASSA ABLOY	
							
			KALDEWEI				FESTOOL
	Panasonic		uponor				Interface
VIESMANN							
							
							

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 
Target group	Architects	Building contractors	HVAC installers	Electrical installers	Professional painters	Consumers
Methodology						
Annual sample size	5,800 interviews	2,050 interviews	3,200 interviews	3,800 interviews	2,300 interviews	26,400 interviews
Country scope	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden • Austria 	
Way of reporting	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly
2020 Theme topics	<ul style="list-style-type: none"> • Q1: Media orientation & consumption • Q2: Shifts in building methods • Q3: City of the future • Q4: Circularity & sustainability 	<ul style="list-style-type: none"> • H1: Circularity & sustainability • H2: Decision-making 	<ul style="list-style-type: none"> • Q1: BIM & calculation tools • Q2: Prefab • Q3: DMU • Q4: Media orientation & consumption 	<ul style="list-style-type: none"> • Q1: Electrification • Q2: Certification & circularity • Q3: Services in installation sector • Q4: Pricing 	<ul style="list-style-type: none"> • Trend tracking • Sustainability • Labour shortage • Online buying • Future expectations • Innovation needs 	<ul style="list-style-type: none"> • Q1: Orientation & smart homes • Q2: Purchase channels • Q3: Branding (A vs. Private) • Q4: DIFM vs. DIY

USP Marketing Consultancy

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