



# European Electrical Installation Monitor Q1-2023

Theme topic: Media orientation

May-2023

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About European Electrical Installation Monitor

Key takeaways

Business development

Theme topic – Media orientation

Cross country summary

United Kingdom

Germany

France

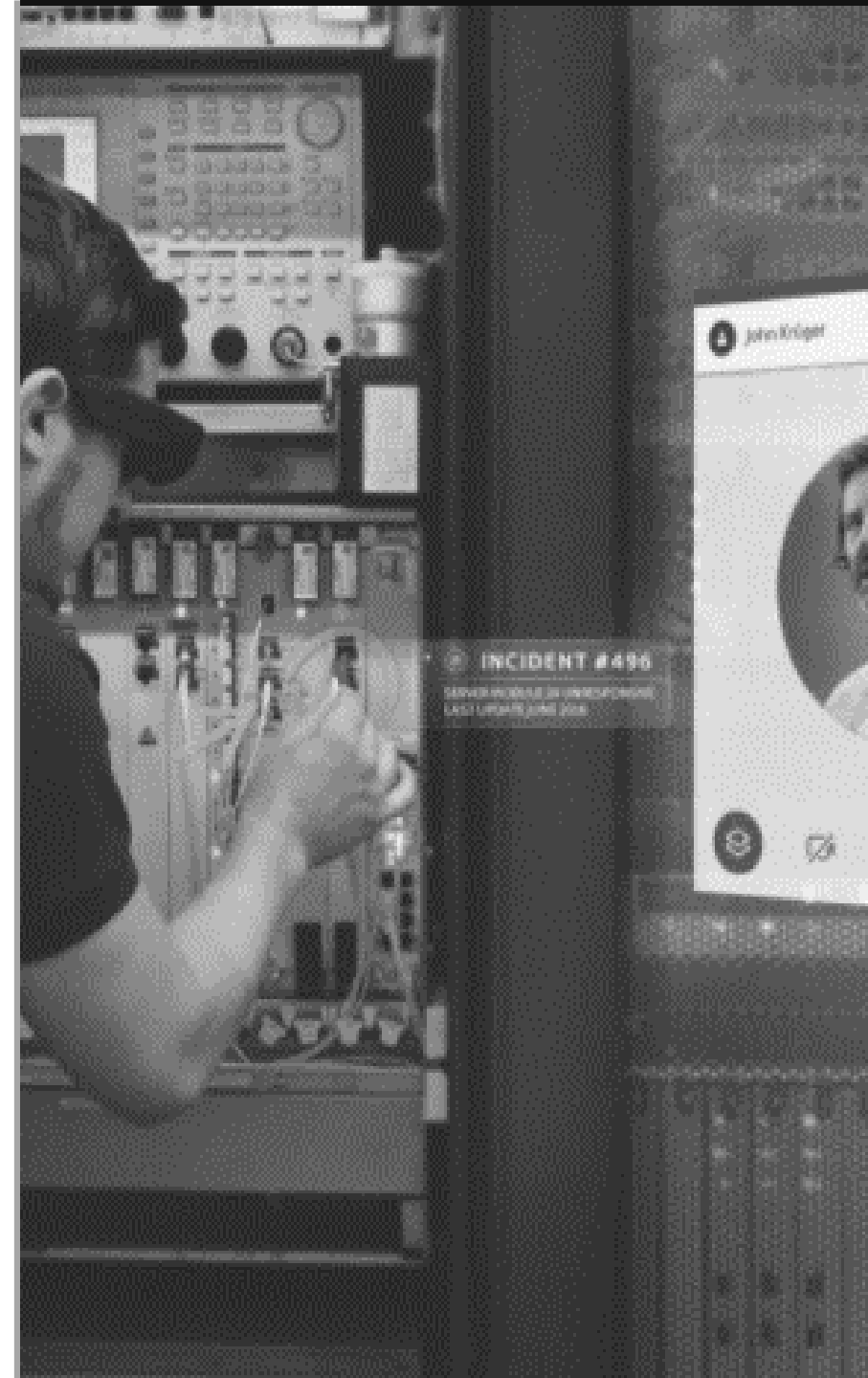
Poland

Belgium

The Netherlands

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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 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 2023:**

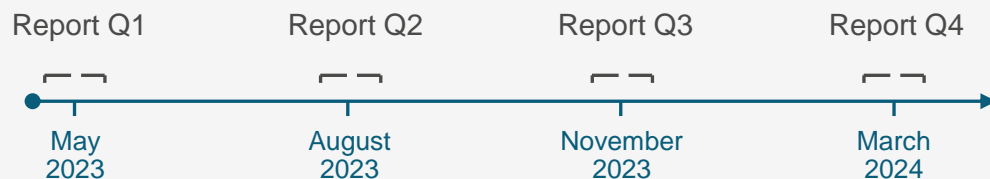
**Q1: Media orientation**

Q2: Training needs

Q3: BIM

Q4: Purchase channels

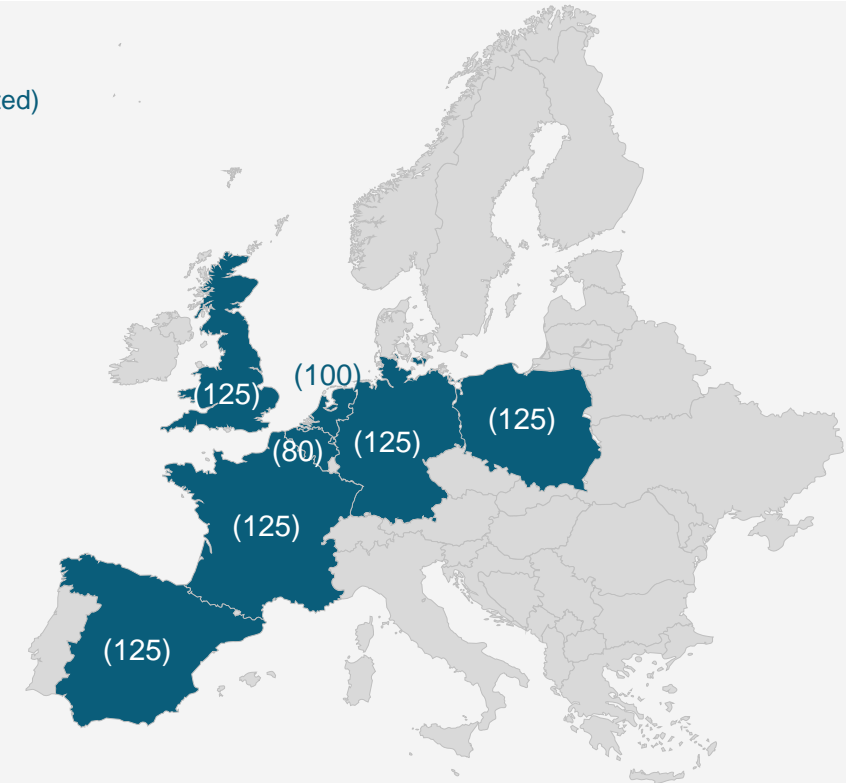
## THE TIMELINE



## COUNTRY SCOPE

(number of interviews conducted)

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



## PROJECT TEAM



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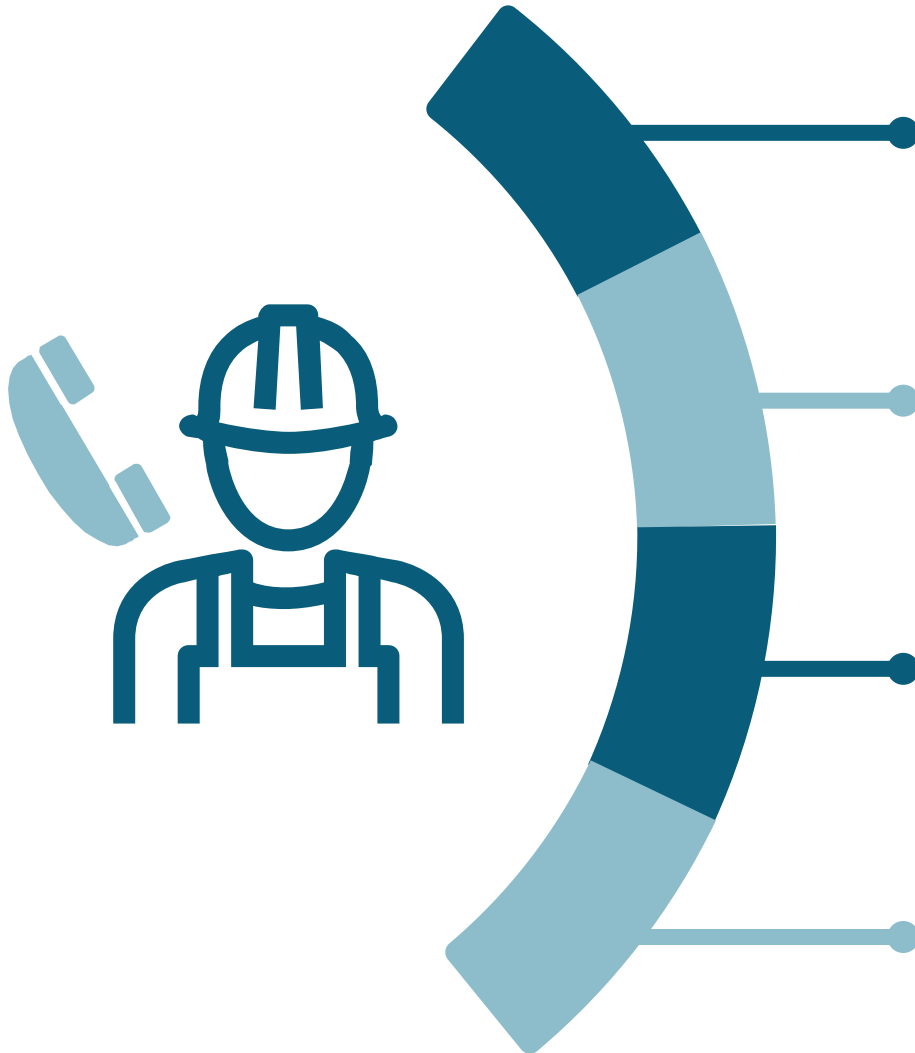
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# About target group & methodology



## 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...

Selecting the right media has never been as complicated as it is now. In this multi-media environment, it is important for you to know how to allocate your marketing & communication budget in the right and most efficient way. Therefore, the Q1 theme topic helps you to understand (1.) installers' need for orientation (2.) changes in the media landscape and via which channels installers can be reached best, and (3.) installers' media habits and preferences.

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

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

- Which media sources are used by installers and how the media landscape developed over time;
- The most useful information sources for installers;
- Relevance of (virtual) trade shows;
- Changes in digital media usage;
- Most important websites and what information installers search for on those websites;
- The usage of apps, digital tools, and social media.

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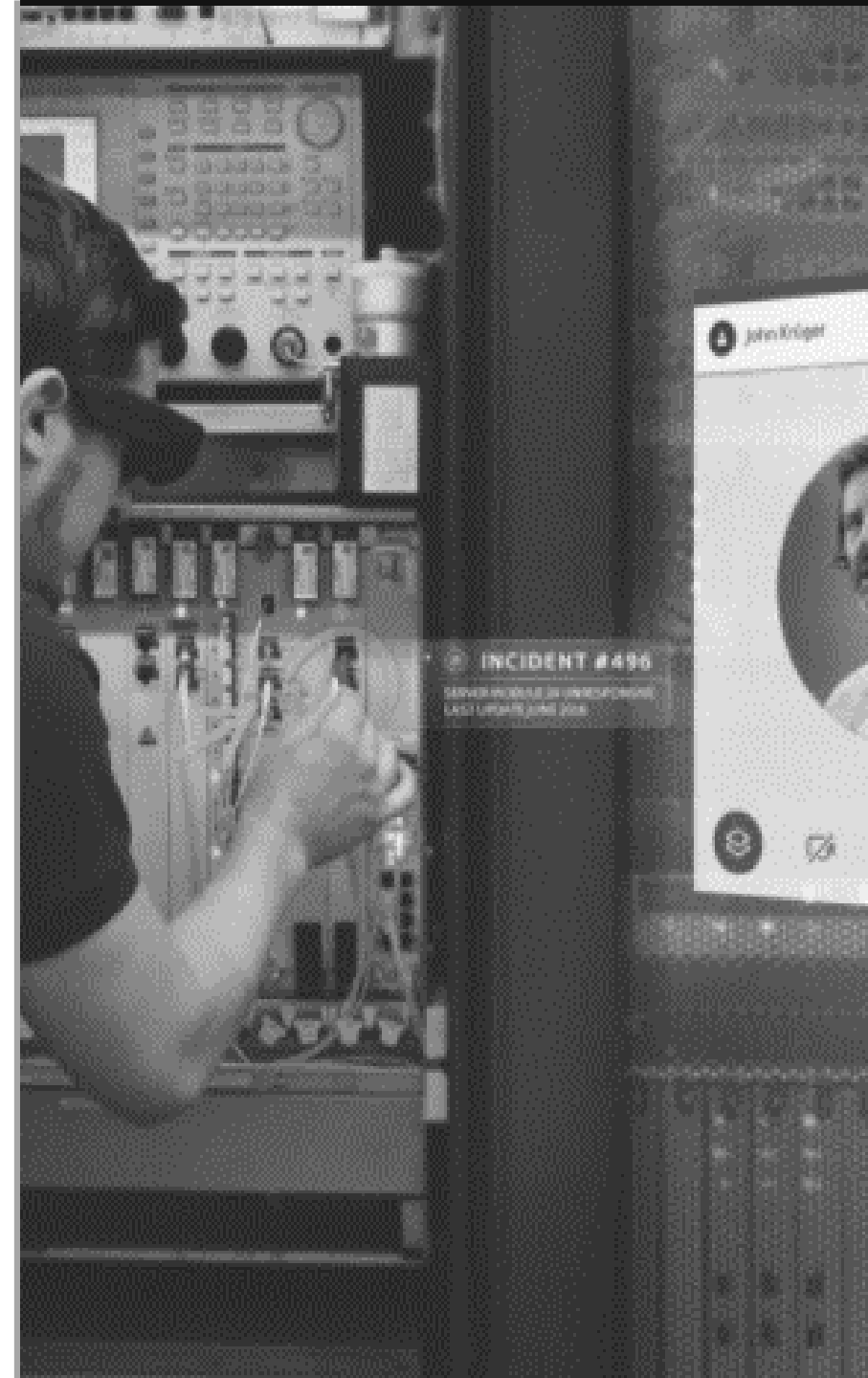
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# Key takeaways

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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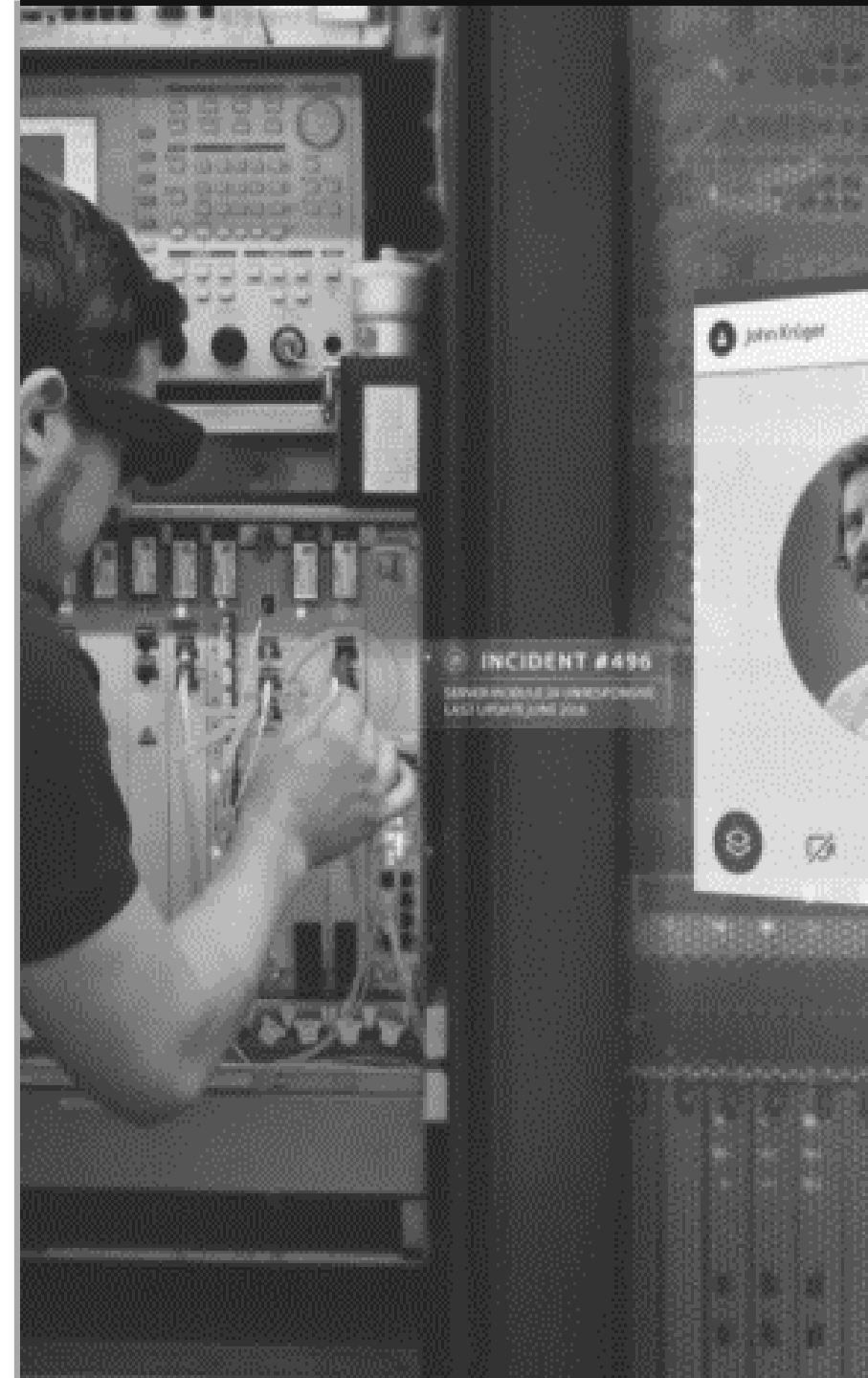
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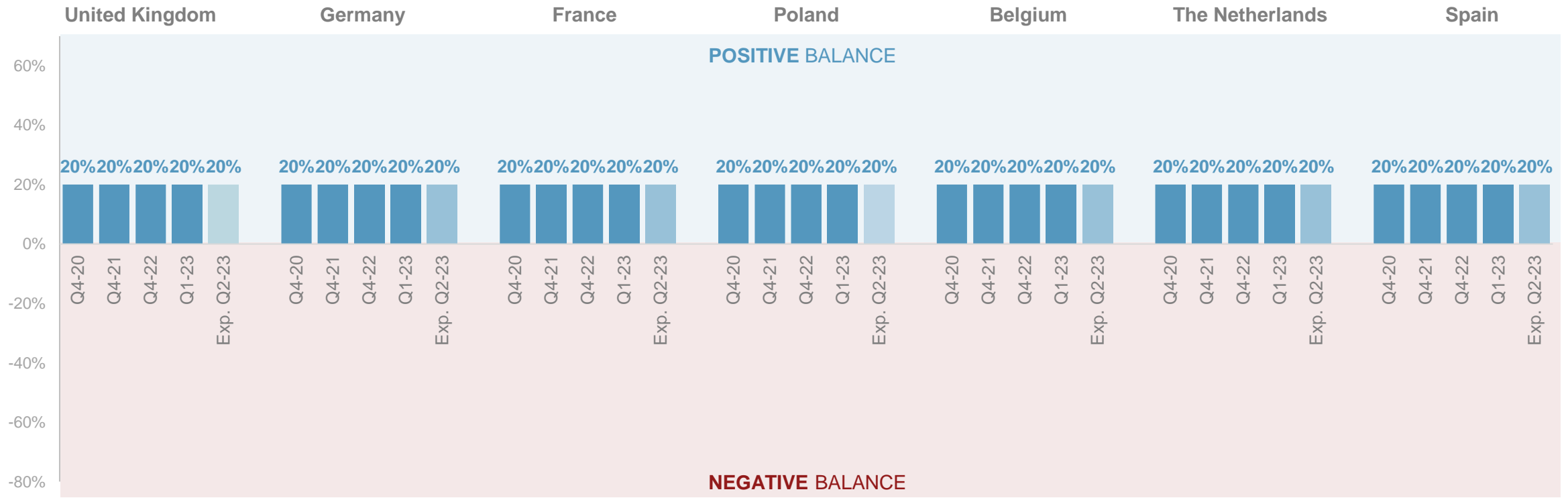
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## DUMMY DATA

### 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)

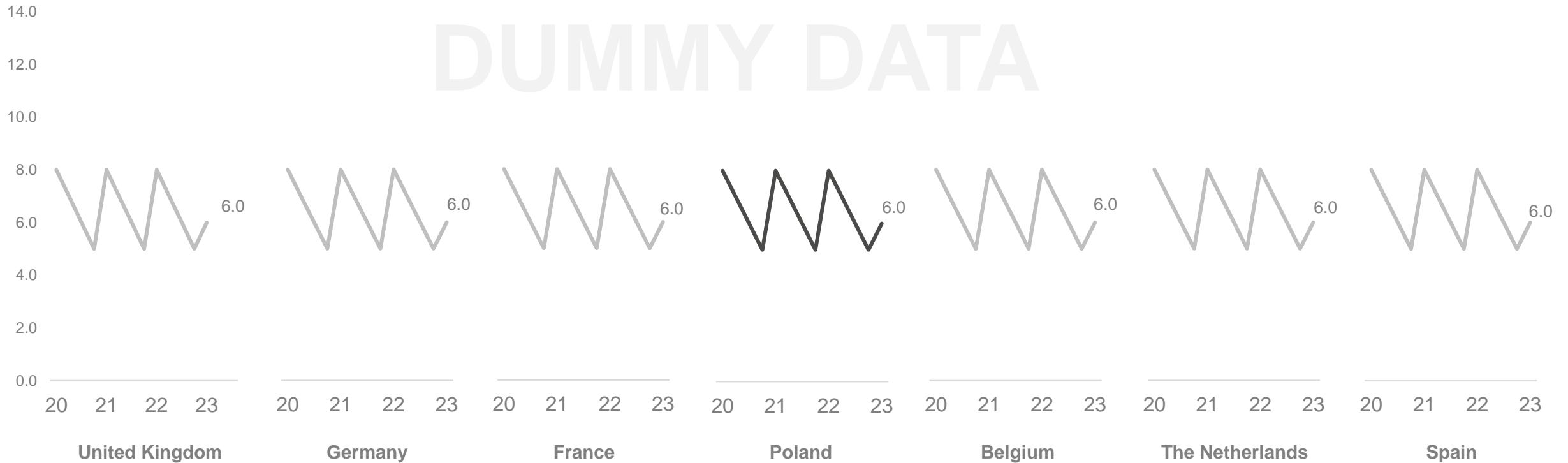


Important: The 2020 and 2021 data was obtained while governmental Covid-19-related restrictions were in effect in the respective countries.

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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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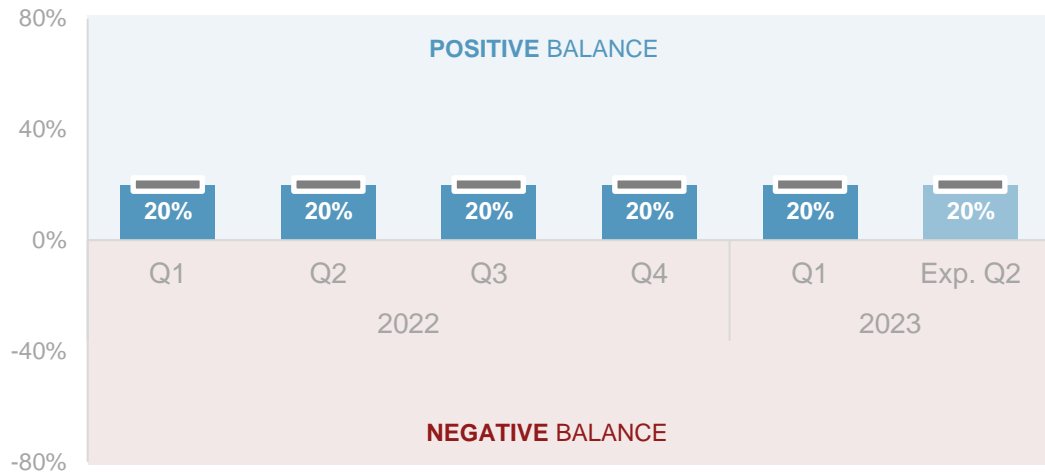
## DUMMY DATA

### 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?

TURNOVER BALANCE = % INCREASE minus % DECREASE)

— COMPARISON SAME QUARTER LAST YEAR



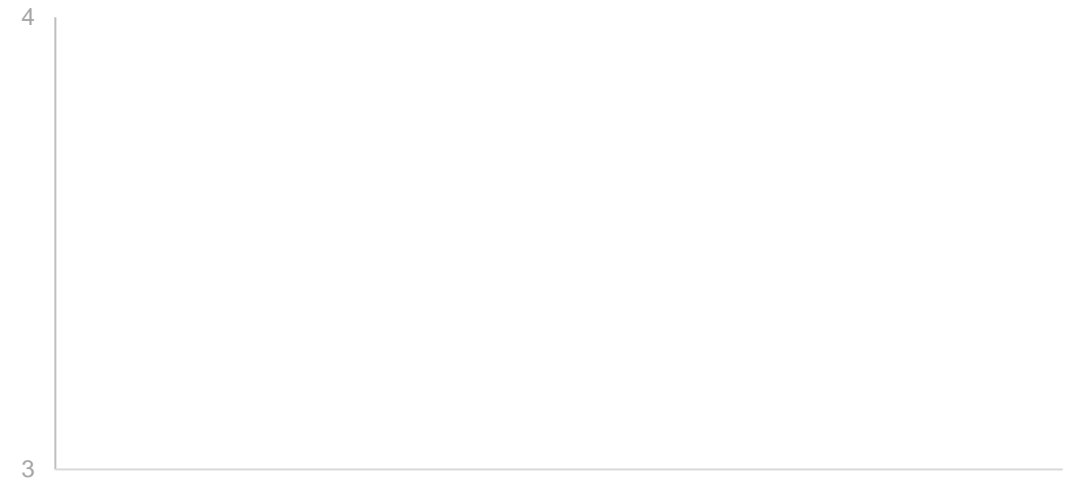
Detailed information regarding the turnover distribution can be found in the [appendix](#).

### Order book portfolio

Q: How big is your current order book portfolio?

ORDER BOOK (MONTHS)

EU | THE UNITED KINGDOM



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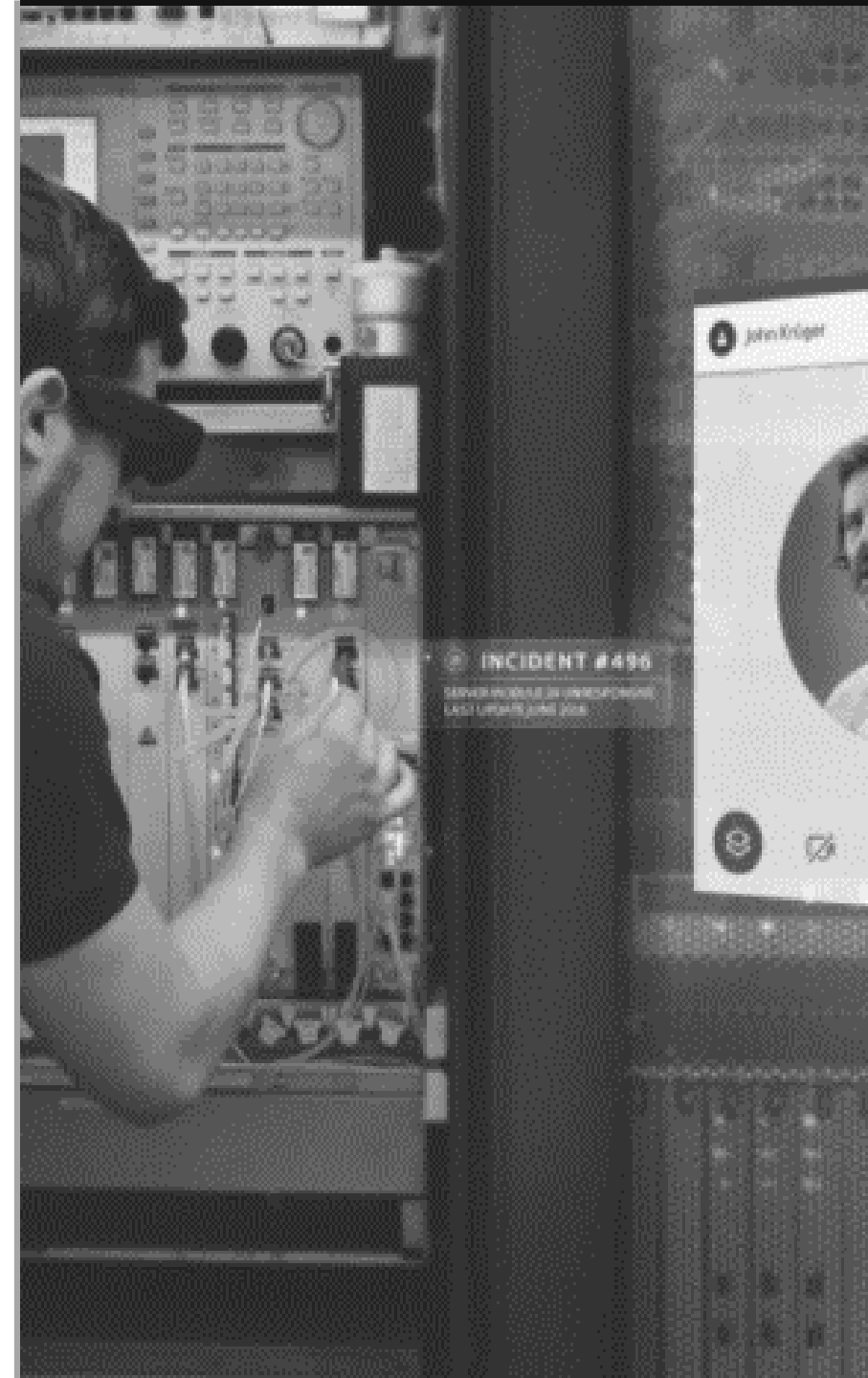
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# DUMMY DATA

## Orientation behaviour & preferences of installers

### STATEMENT:

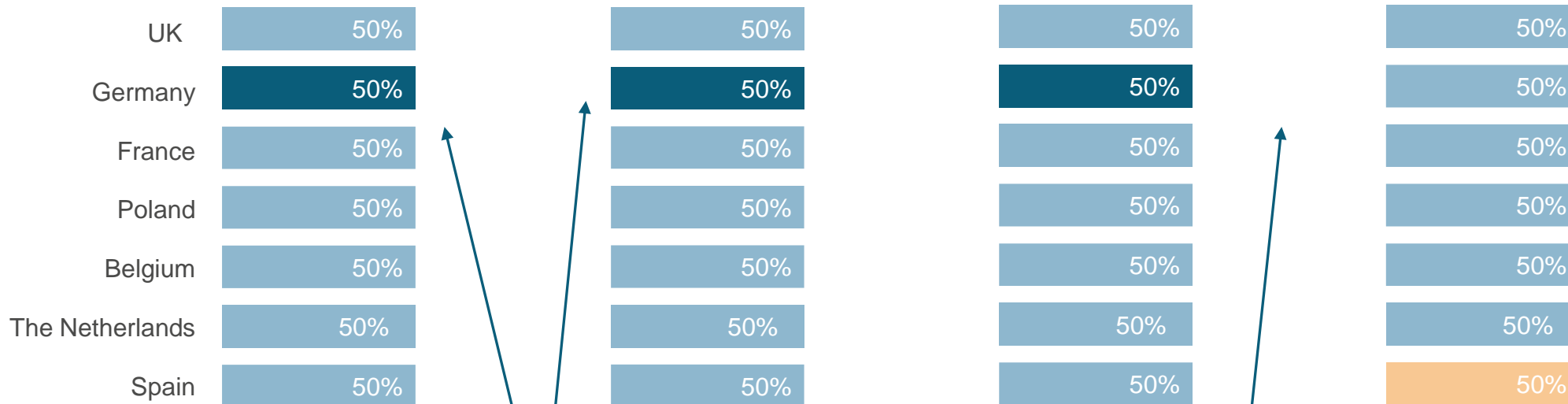
*"I invest time in learning more **about** the latest **trends** and product developments"*

*"I further **investigate** a new product after seeing/ hearing about it in an ad"*

*"**Printed** information sources are still important for me to have"*

*"**Audio/ video** content is more useful than written content"*

% (strongly) agree



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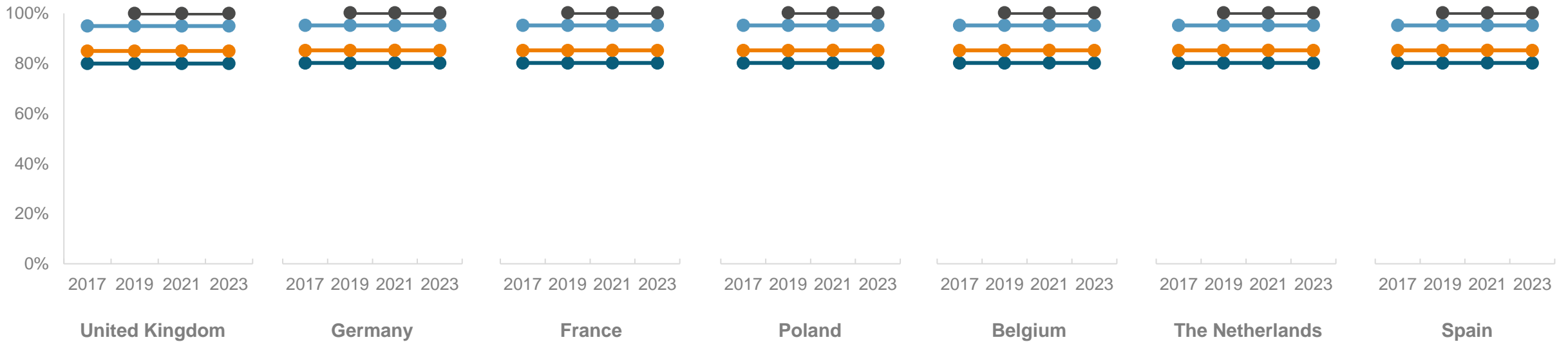
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## 1. Lorem ipsum dolor sit amet, consectetur adipiscing elit.

DUMMY DATA

### Media usage over time

Traditional | Personal | Digital | Social



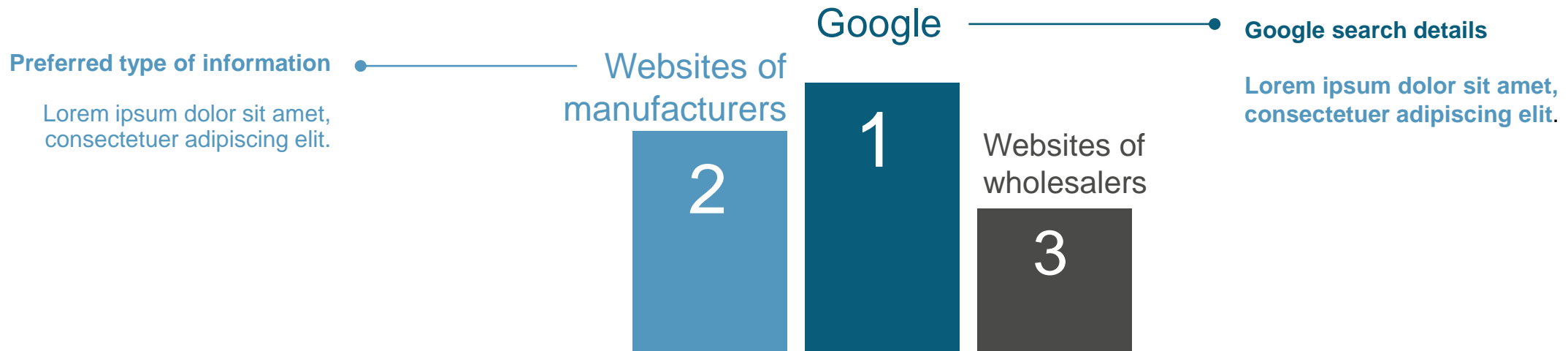
Base: All

The **internet** is seen as the **most useful** information source.

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# DUMMY DATA

Most used types of websites



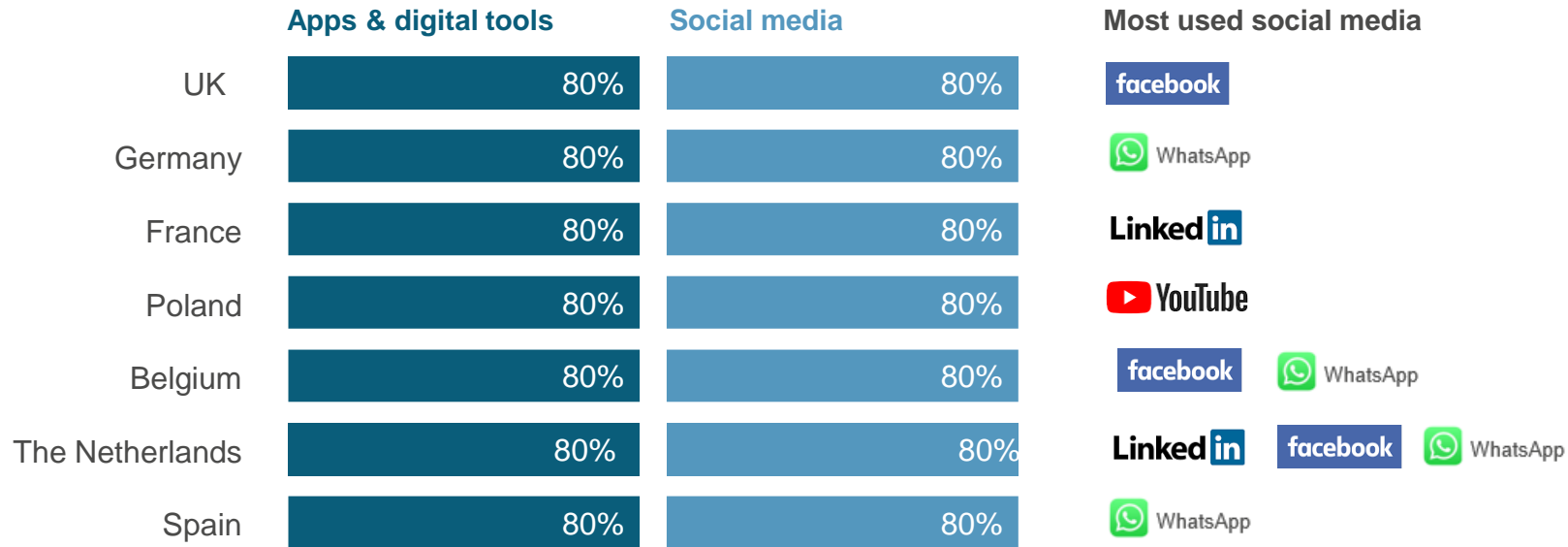
Base: Asked if searching on the Internet



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# DUMMY DATA

Usage of apps & digital tools and social media for professional purposes

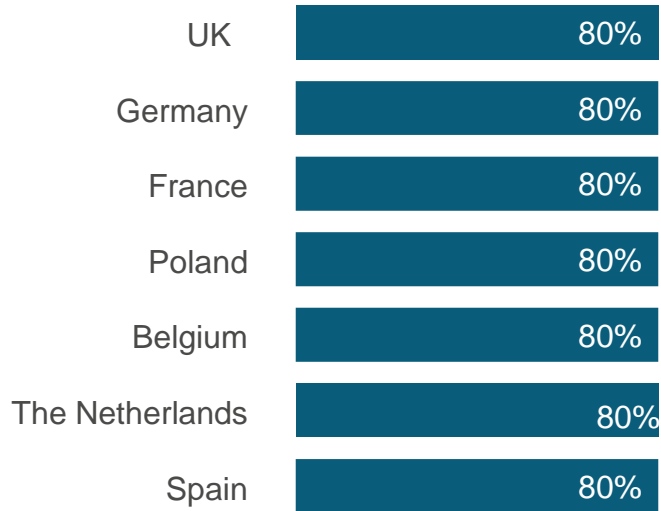


Base: All

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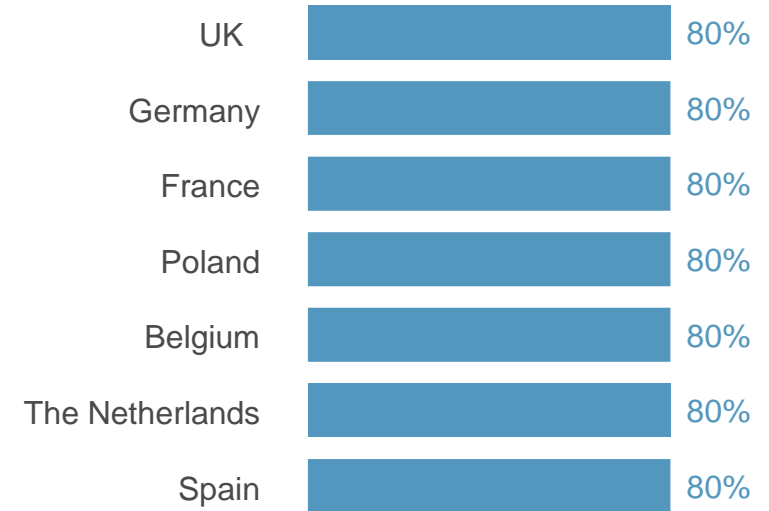
# DUMMY DATA

Expect to visit **traditional trade shows**



Base: Asked if visiting trade shows

Participated in any **virtual trade shows**



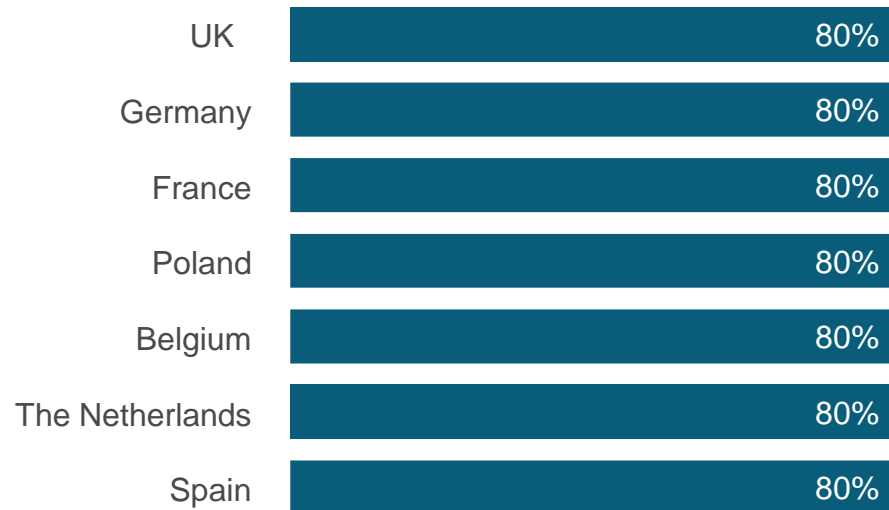
Base: All

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# DUMMY DATA

## Media usage intensity

Share of installers using all four\* types of media




\*Traditional, digital, personal, social

Base: All

**ZOOMING IN ON**

**FTE:**

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**AGE:**

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# Marketing to different generations

# DUMMY DATA



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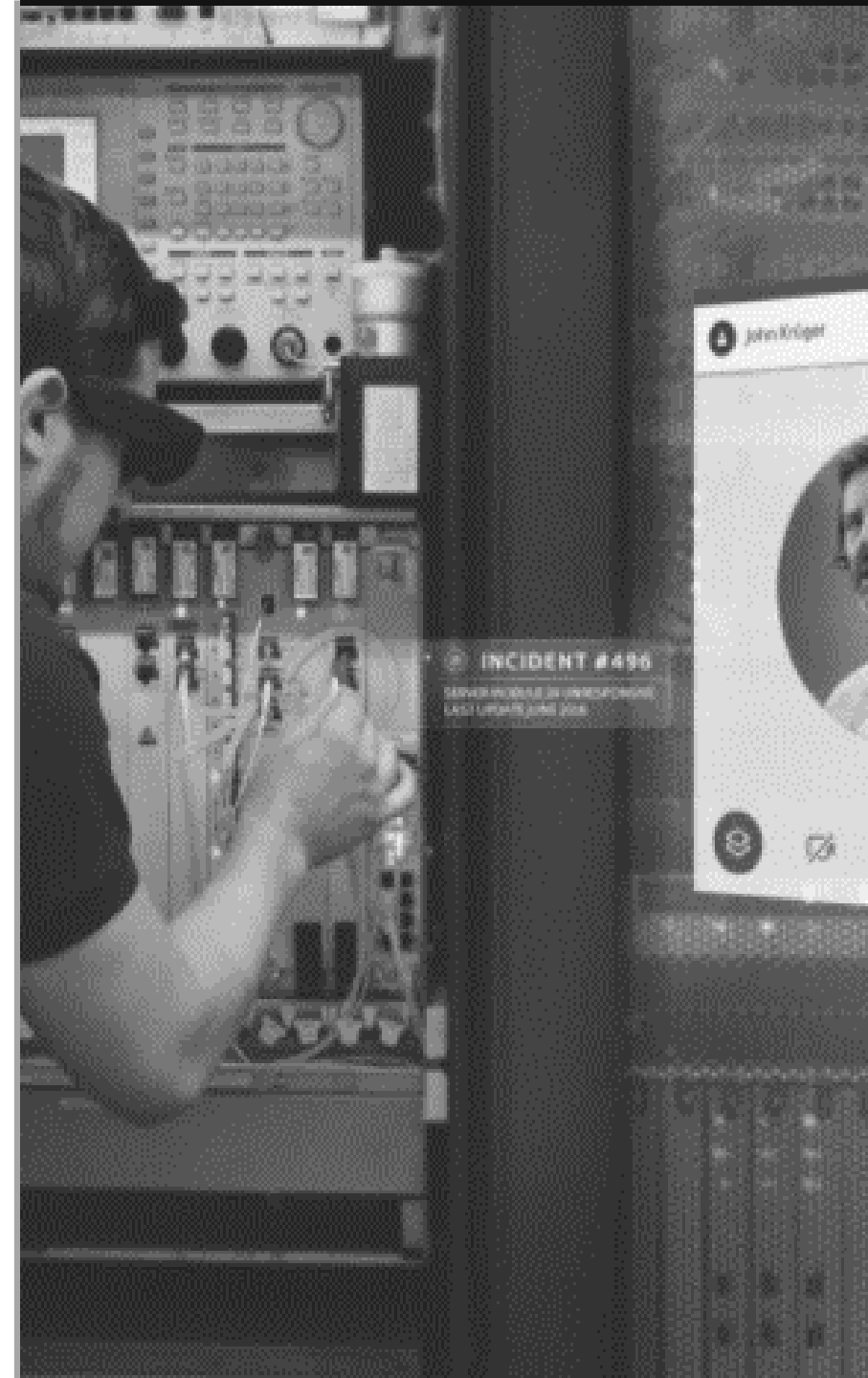
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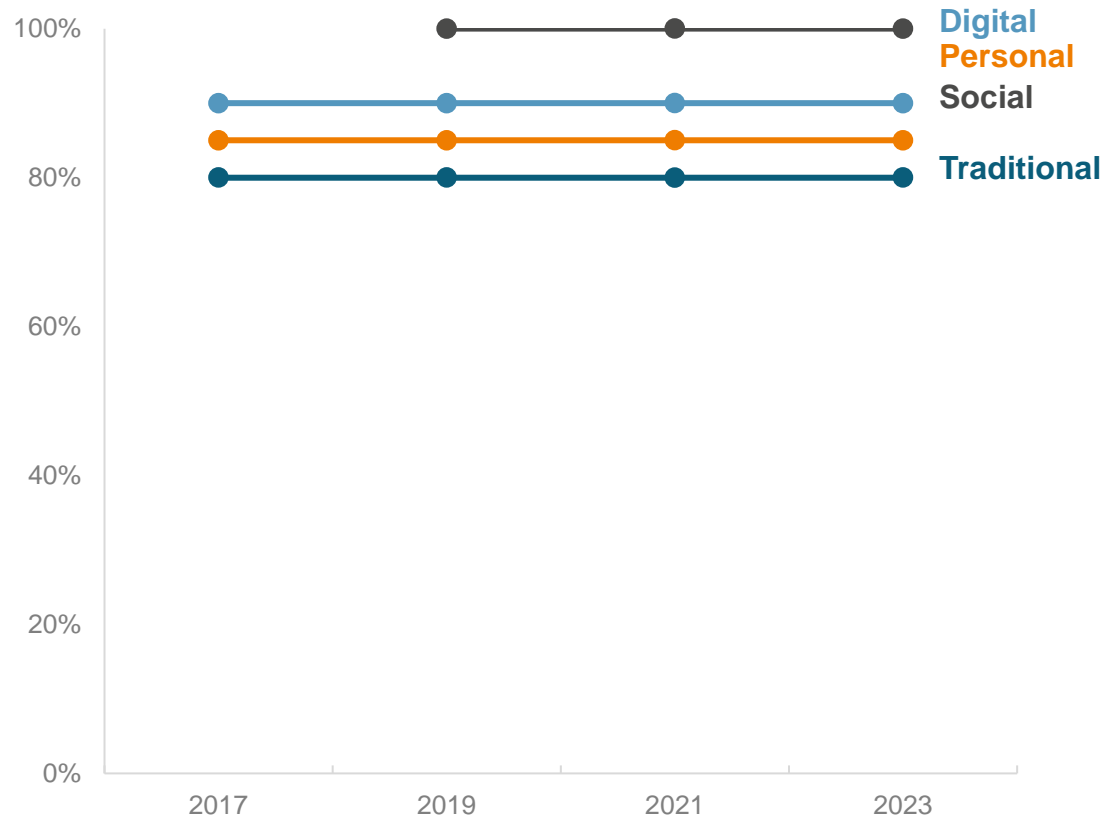
Appendix



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DUMMY DATA

Media sources over time \*



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

Media sources in 2023

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



Base: n=125, all

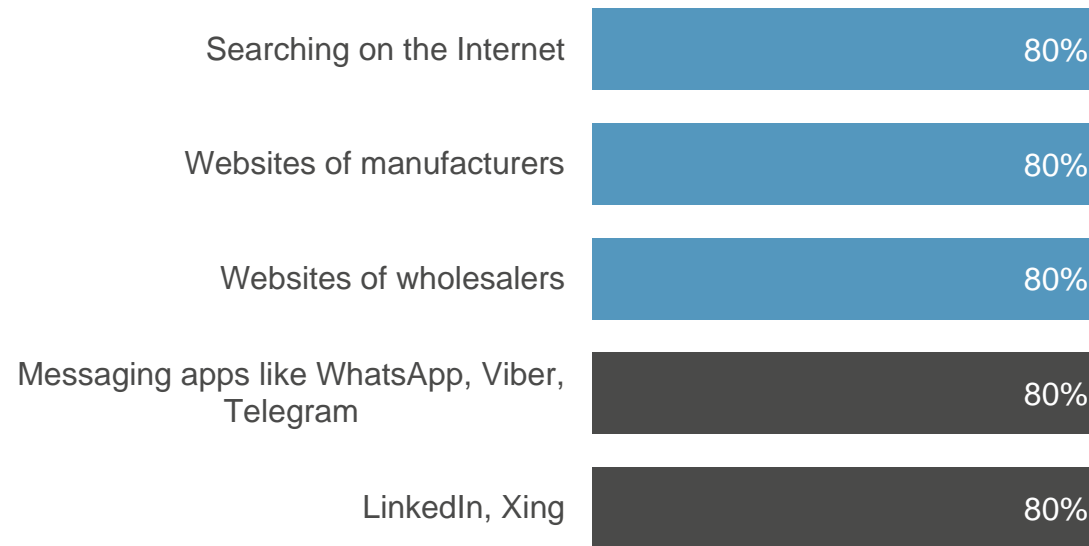
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## DUMMY DATA

### Most useful information sources – top 5

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

Traditional | Personal | Digital | Social

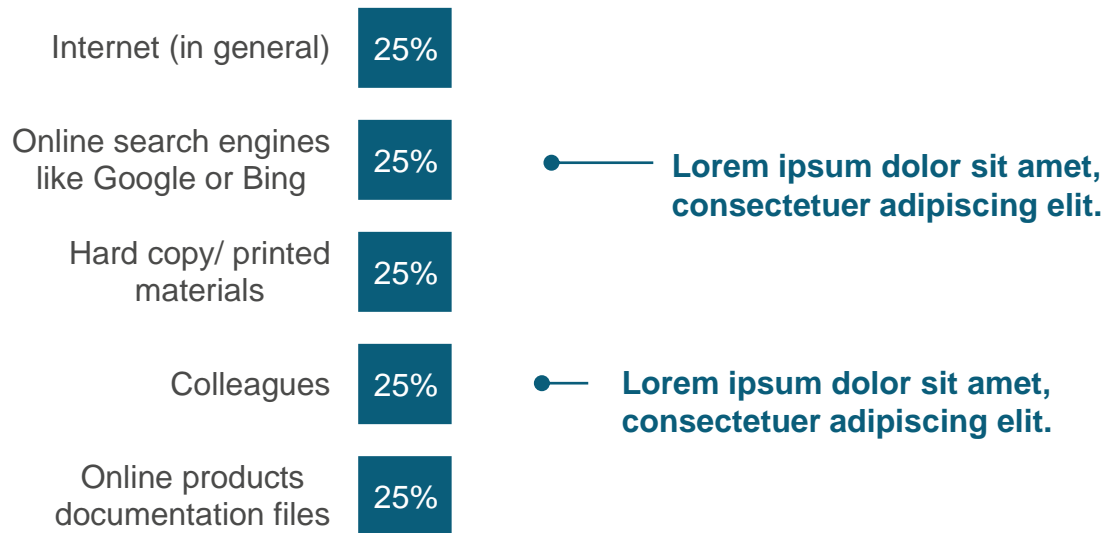


Base: n=125, all

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## 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?

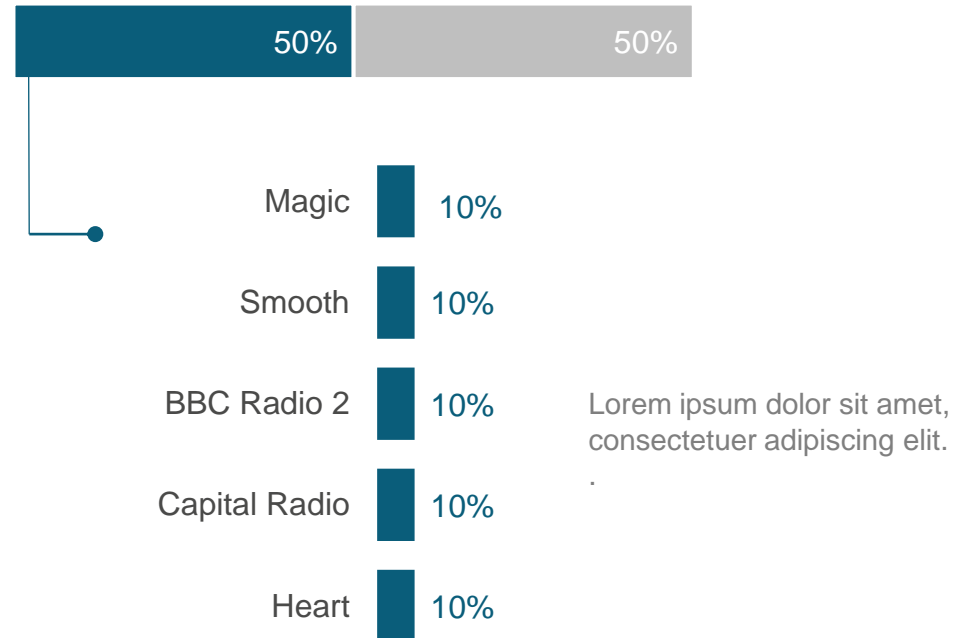


Base: n=41, if working in the field

## 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



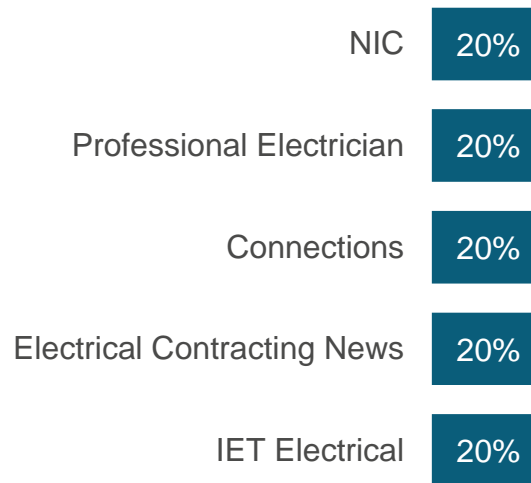
Base: n=125, all



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## Professional magazines read – top 5

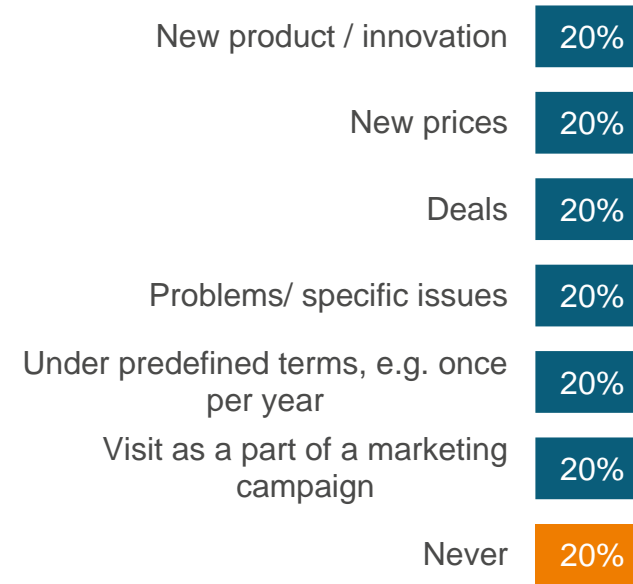
Q: Which professional magazines do you read?



Base: n=29, if reading professional magazines

## Contact with manufacturers' representatives – top 5

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



Base: n=42, if having contact with manufacturers' representatives

DUMMY DATA

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**Traditional** trade shows

20%

**expect to visit trade shows** in the coming years.

Base: n=68, if visiting trade shows

**Virtual** trade shows

Only 20%

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

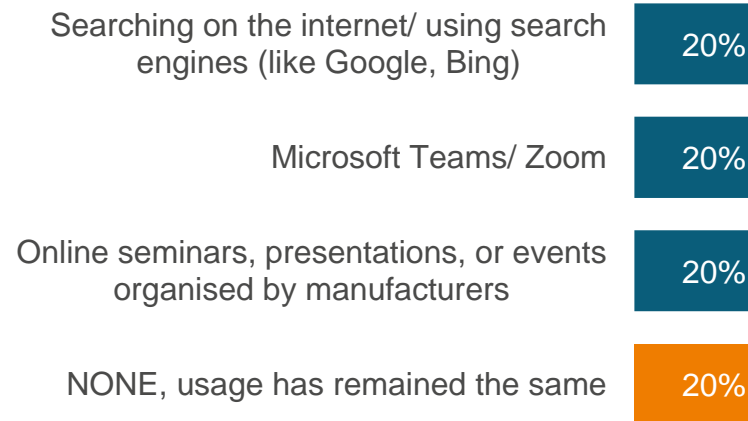
Base: n=125, all

DUMMY DATA

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## Changes in digital information sources – top 3

Q: 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 COVID-19 crisis?



Base: n=125, all

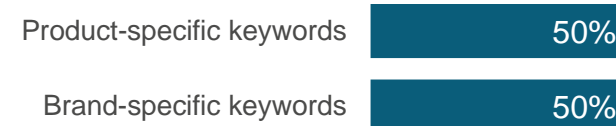
DUMMY DATA

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**Google search behaviour**

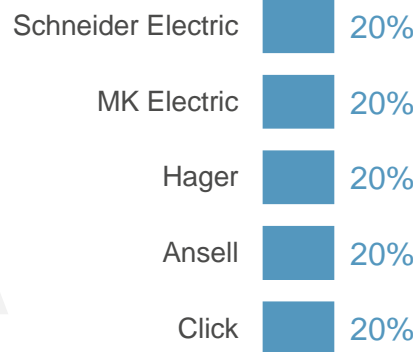
Q: When using Google, do you mainly look for product-specific keywords, brand-specific keywords or something else?



Base: n=65, if using Google

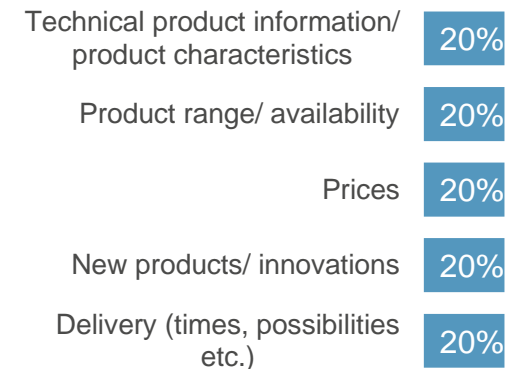
**Manufacturers' websites visited – top 5**

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=47, if visiting manufacturers' websites

DUMMY DATA

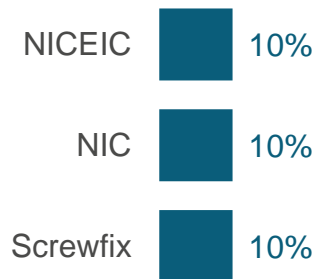
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**50%** use **apps & digital tools** for **professional purposes**

DUMMY DATA

## Used apps & digital tools – top 3

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



Base: n=80, if using apps & digital tools

## Reasons for using apps & digital tools – top 5

Q: What do you use the apps & digital tools for?



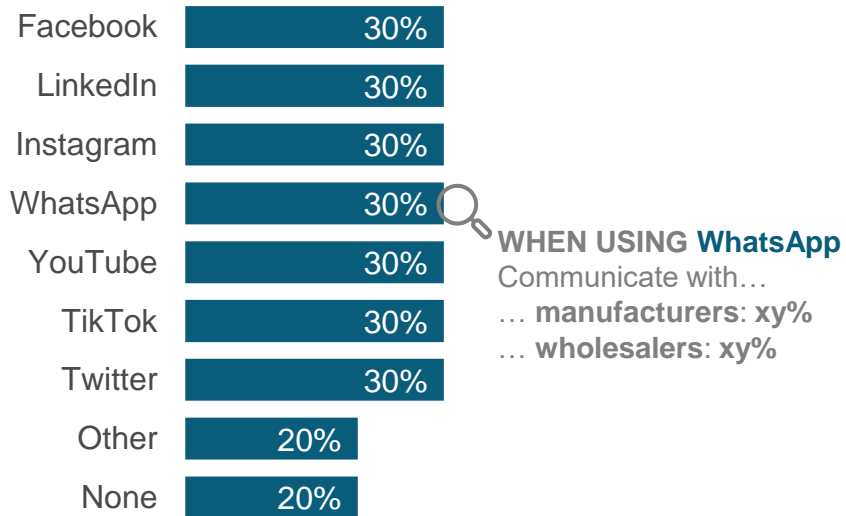
Base: n=80, if using apps & digital tools

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

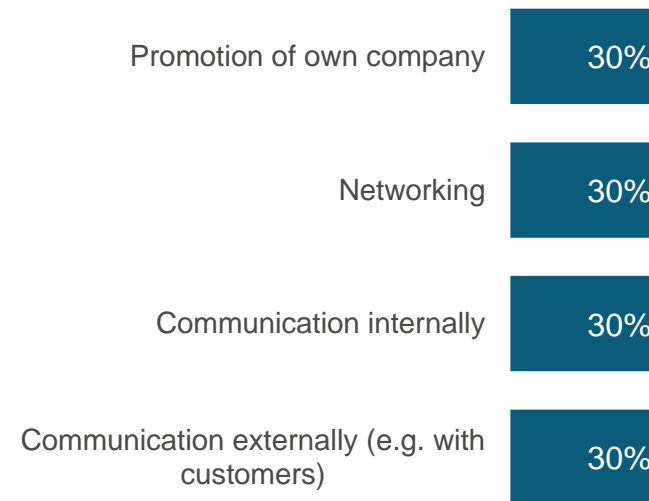
# DUMMY DATA

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



Base: n=114, 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=114, if using social media for professional purposes

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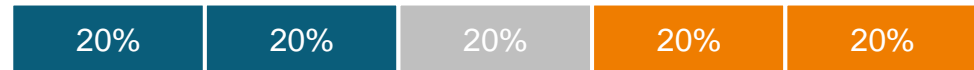
DUMMY DATA

## Orientation behaviour & preferences

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

(STRONGLY) AGREE | NEUTRAL | (STRONGLY) DISAGREE

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 products after seeing/ hearing about it in an ad



Base: n=125, all

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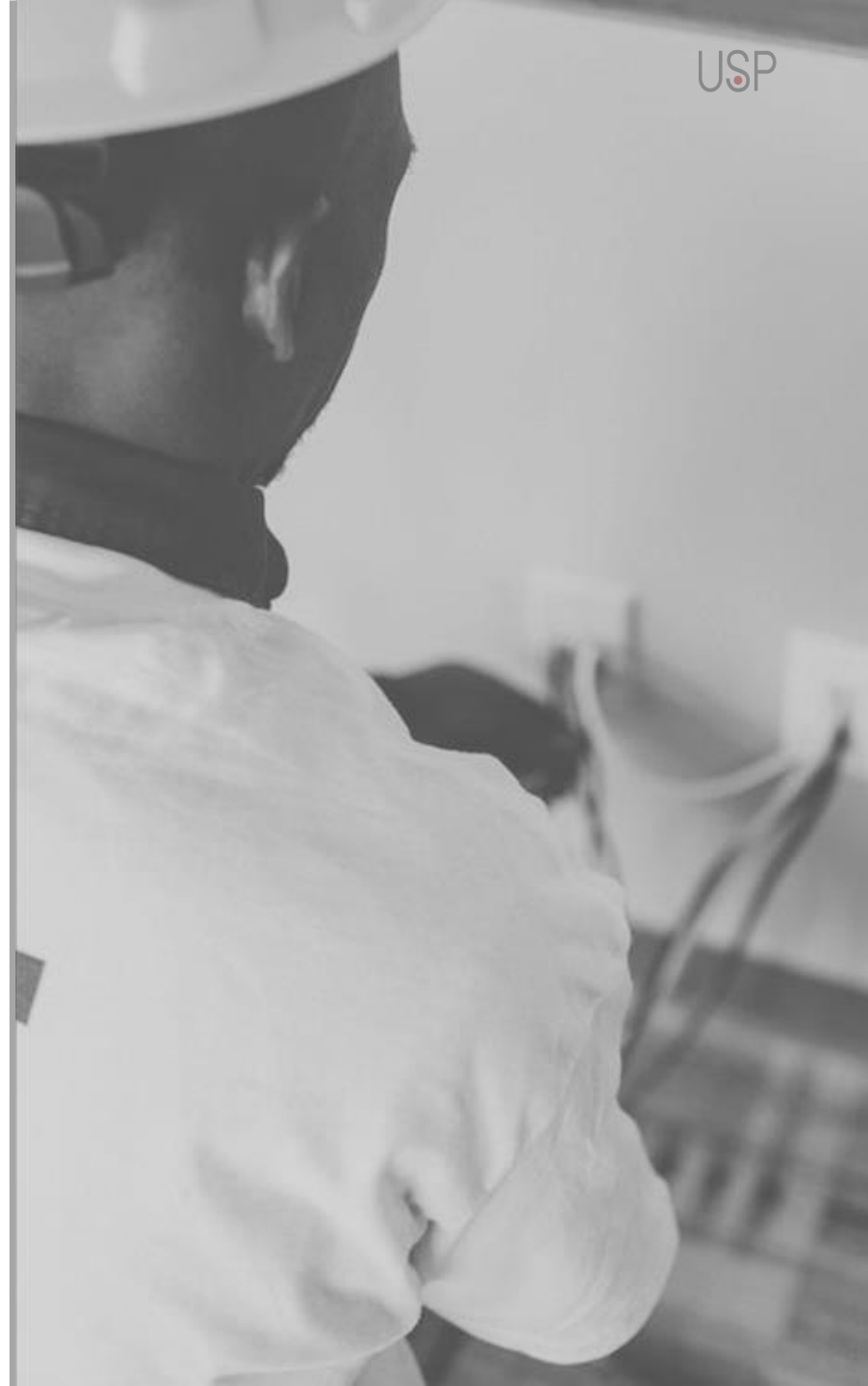
Poland

Belgium

The Netherlands

Spain

Appendix





# 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%

Q1 2022 data, unweighted

# About USP

## USP Marketing Consultancy



Head office



Subsidiaries



Rotterdam



Düsseldorf Zagreb



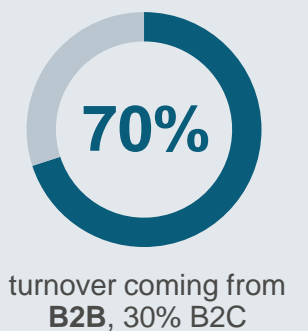
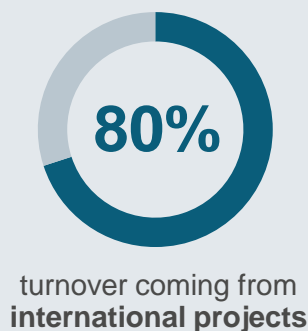
**Market specialist**  
installation, construction, home improvement and real estate

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**



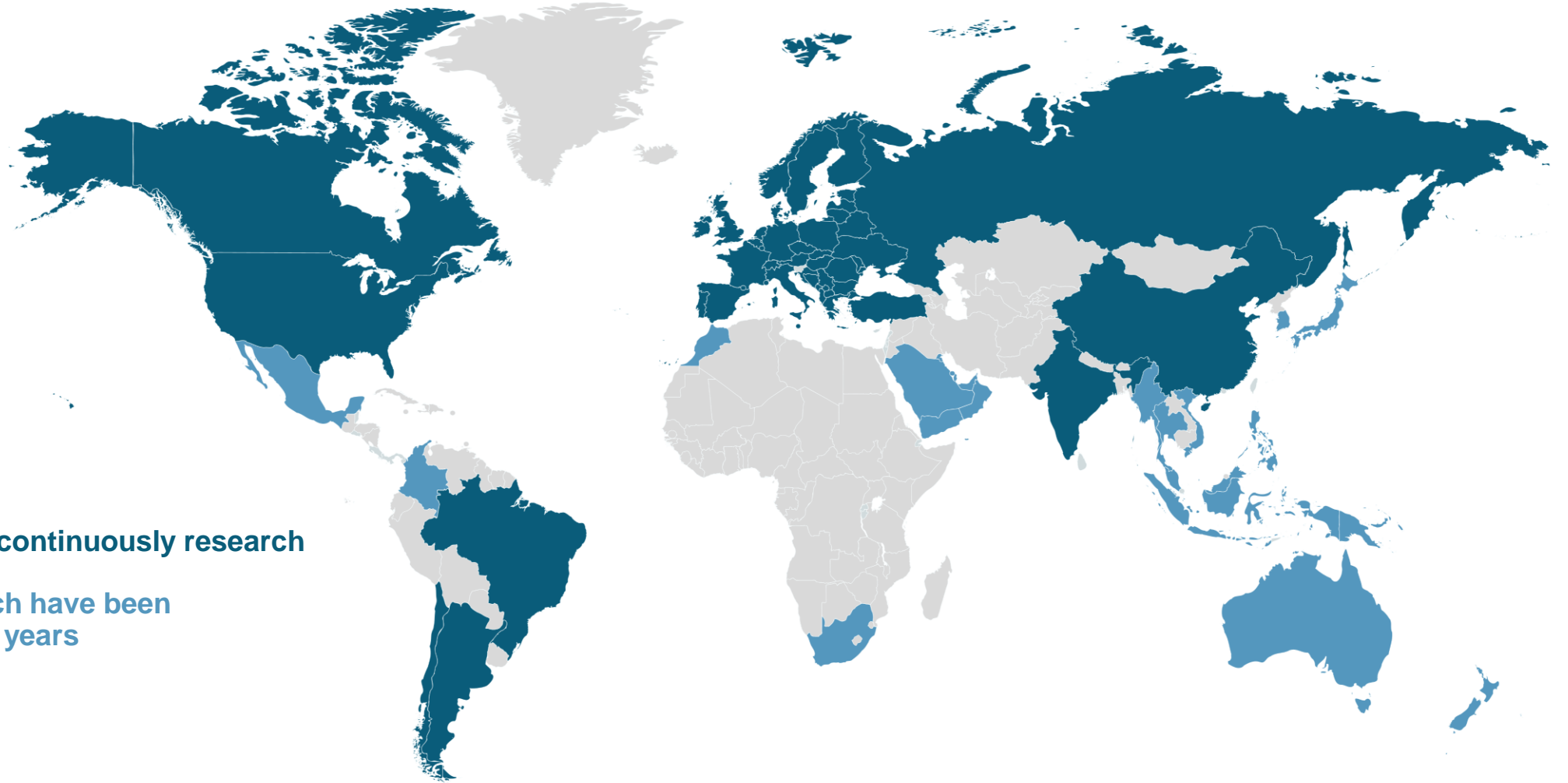
## Dedicated market research

- 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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