



# European Electrical Installation Monitor Q3-2022

Theme topic: Services in the installation sector

Oct-2022

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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:

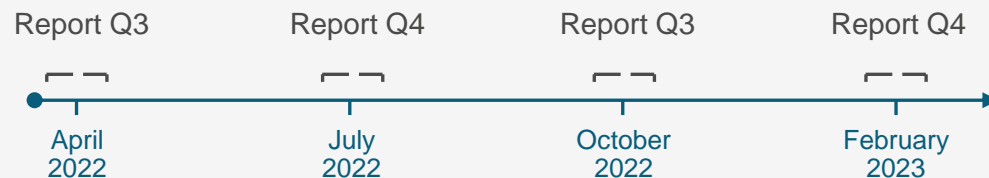
Q3: Sustainability

Q4: Smart buildings

Q3: Services in the installation market

Q4: Branding

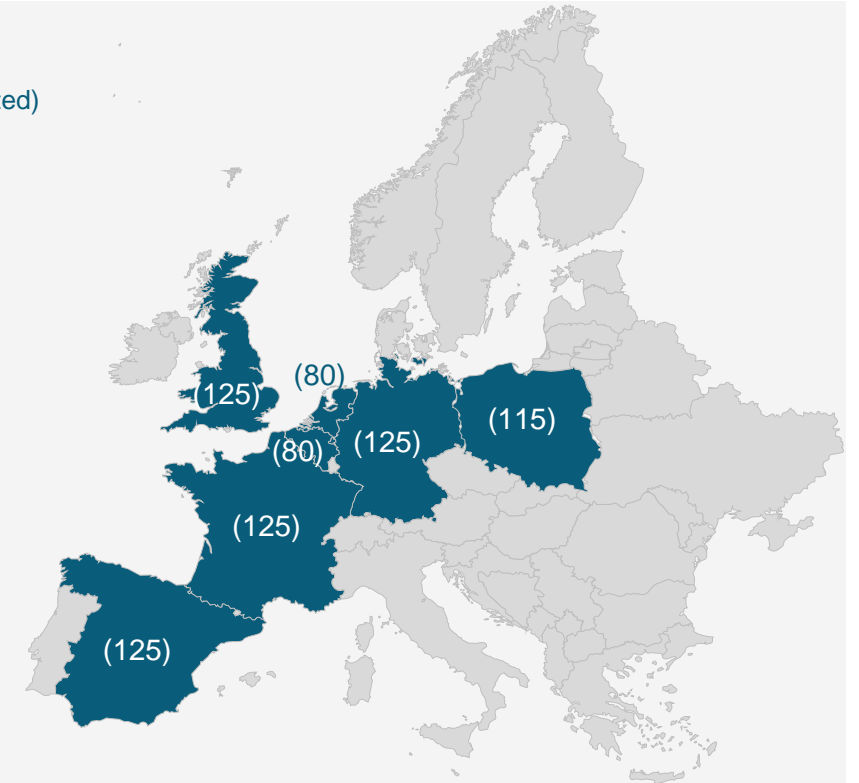
## THE TIMELINE



## COUNTRY SCOPE

(number of interviews conducted)

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



## PROJECT TEAM



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# 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

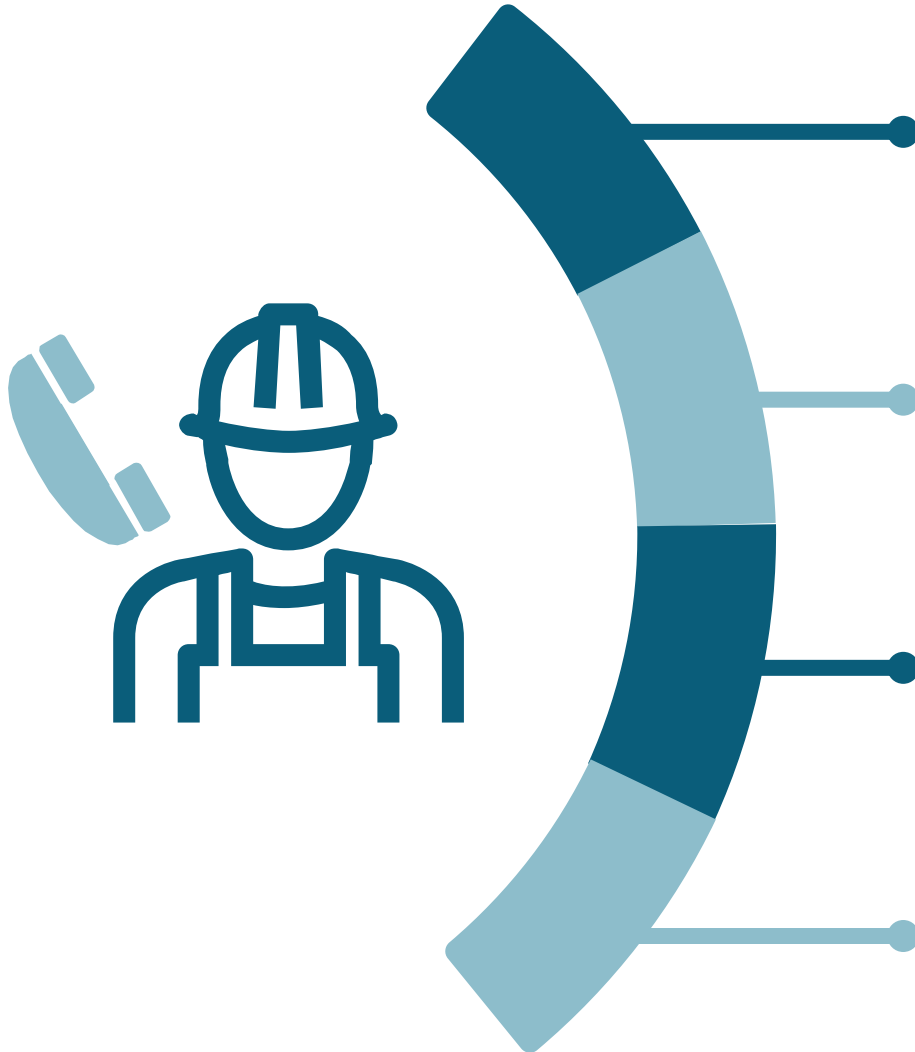
USP possesses an international database of electrical installation companies, which is constantly updated. Respondents are thus not part of a fixed panel; the sample varies from wave to wave.

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

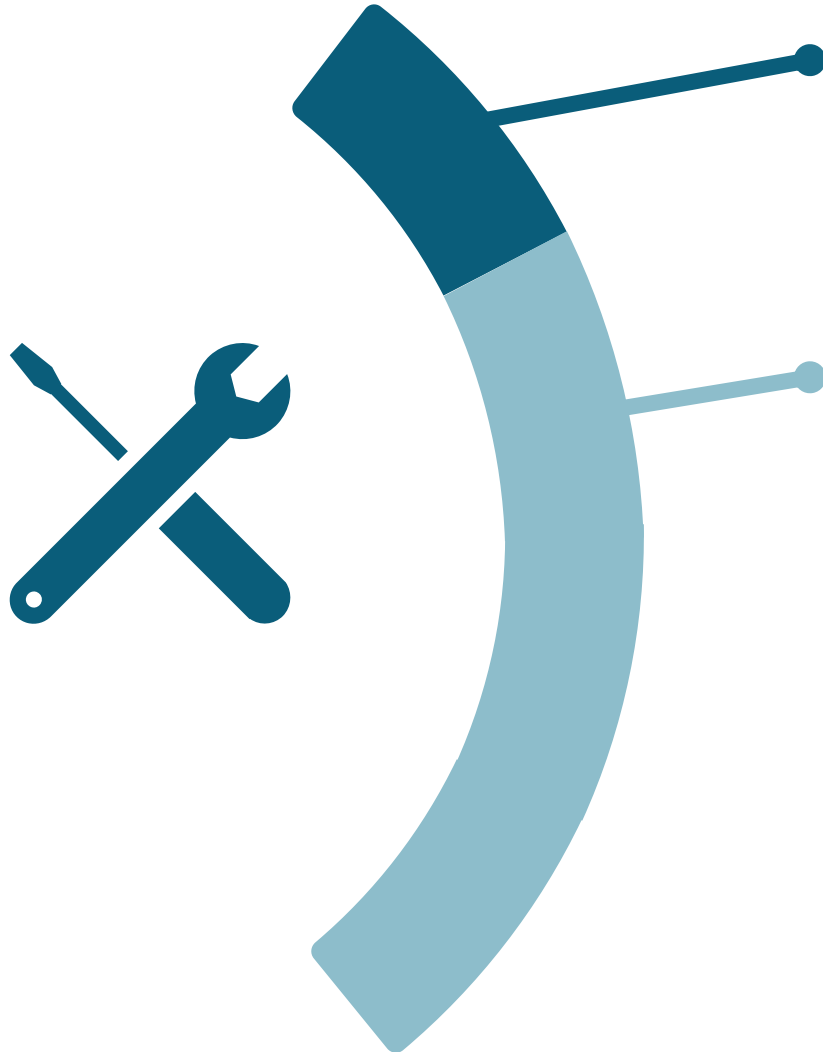
Phone surveys are the best approach for obtaining a sufficient sample, in order to provide insights that can be relied on. These phone calls are made by fixed fieldwork partners, located in the respective countries.

## ... 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 Q3 theme topic



## Surveying the Services in the installation sector...

This quarter we investigated the topic of services, by asking installers which services (in addition to the usual installation work) they offer to their customers (e.g. advice, remote monitoring, and troubleshooting, etc.) and which services installers would like to receive from manufacturers.

## ...helps to understand the needs of installers in their work

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

- Services offered by installers
- Services installers would like to receive from manufacturers:
  - Commercial
  - Engineering
  - Products & installations
  - Repair & maintenance



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# Key takeaways

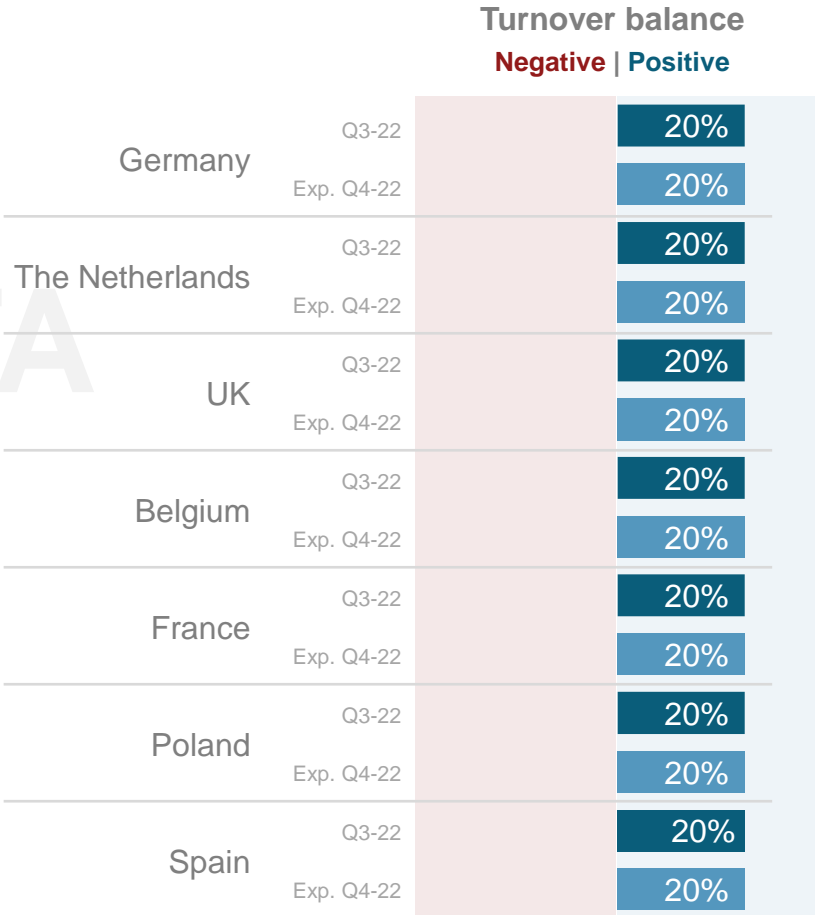


## Business Development

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

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# Key takeaways



## Services in the installation sector

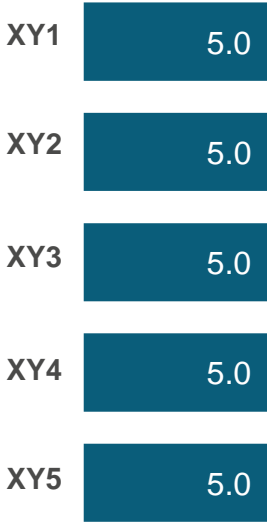
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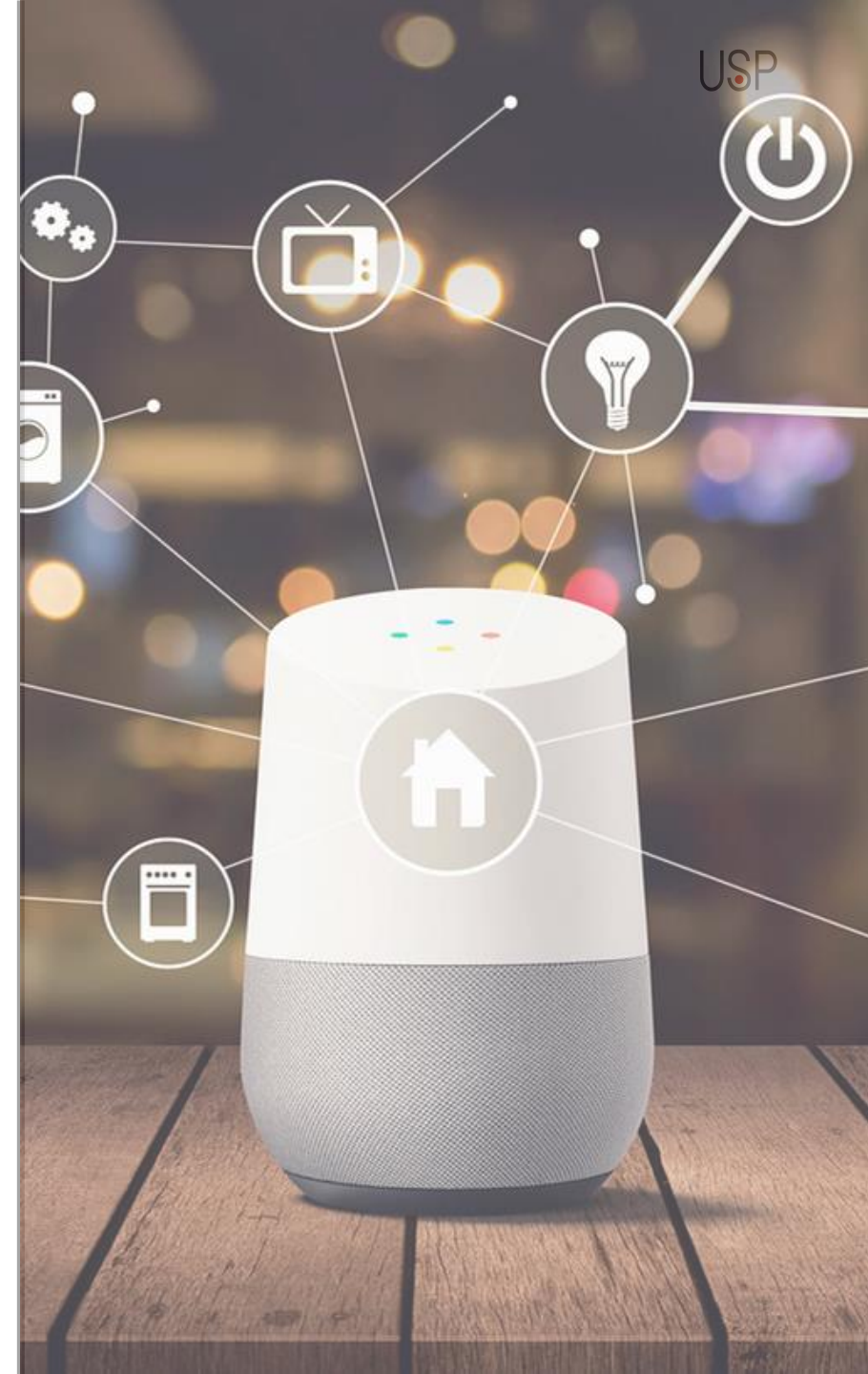
Top 5 services installers want to receive from manufacturers





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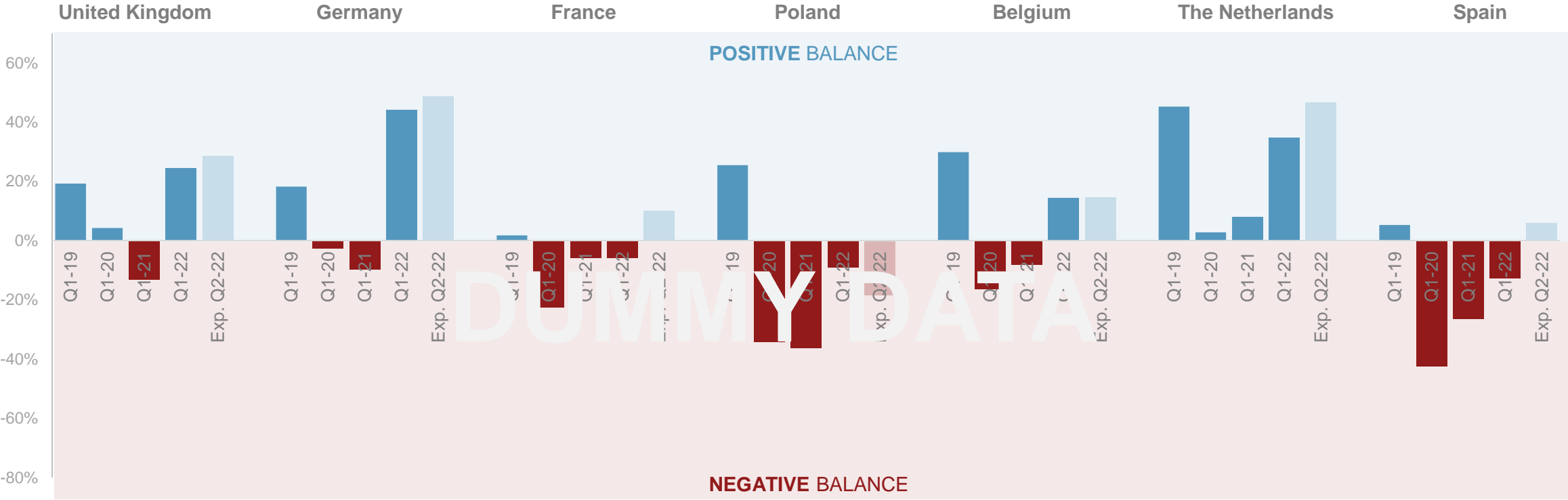


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Turnover balance

Q: If you compare your turnover of Q3-22 to the same quarter last year, how did your turnover develop?

(% INCREASE minus % DECREASE)

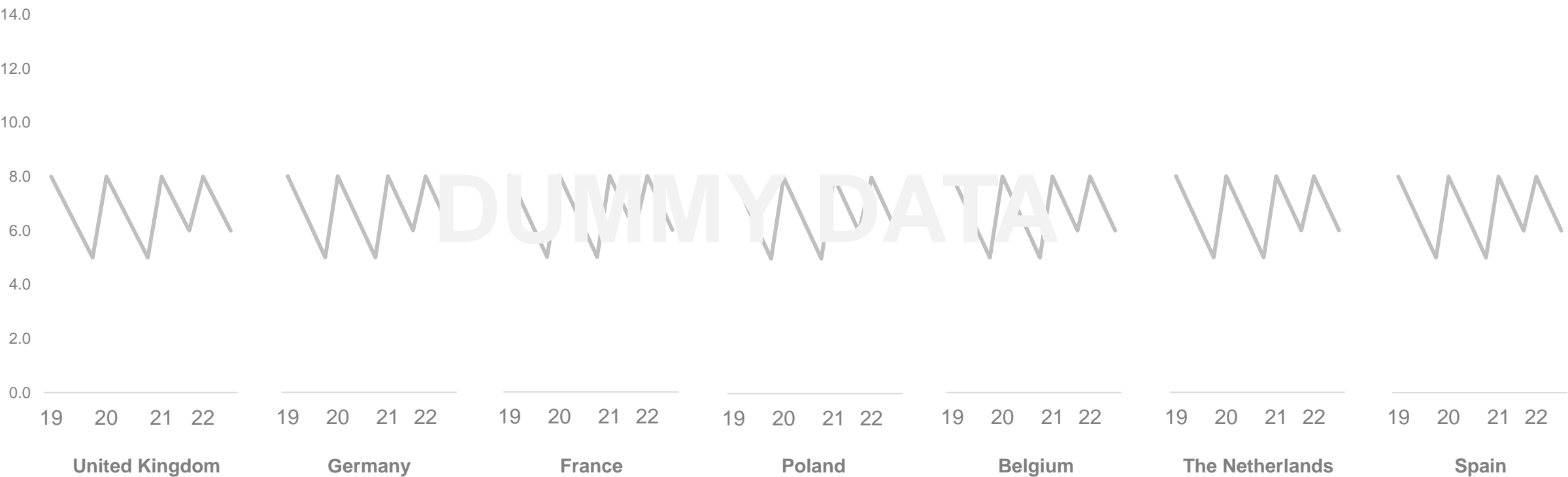


Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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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)

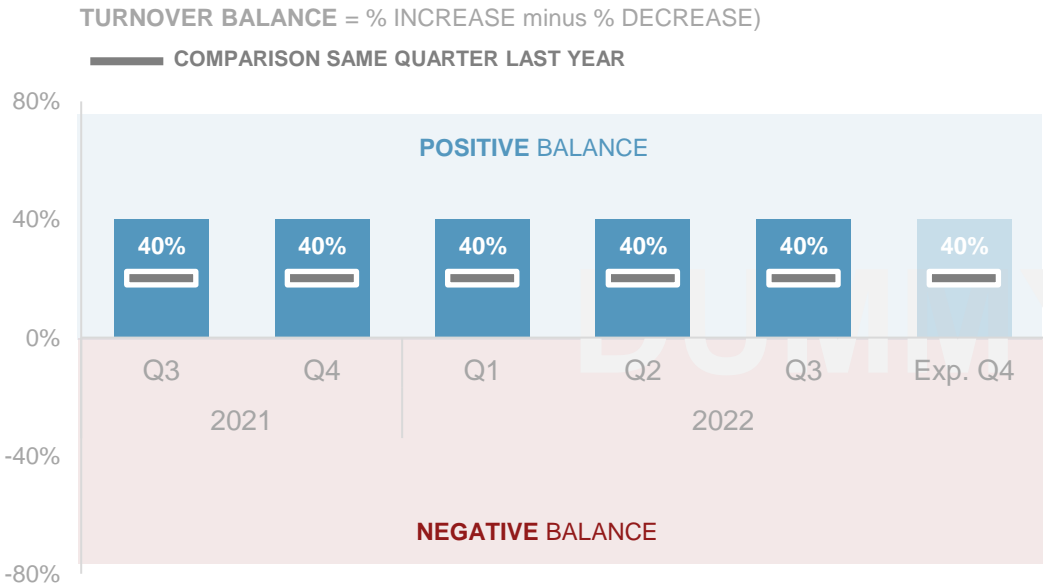


Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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Turnover balance

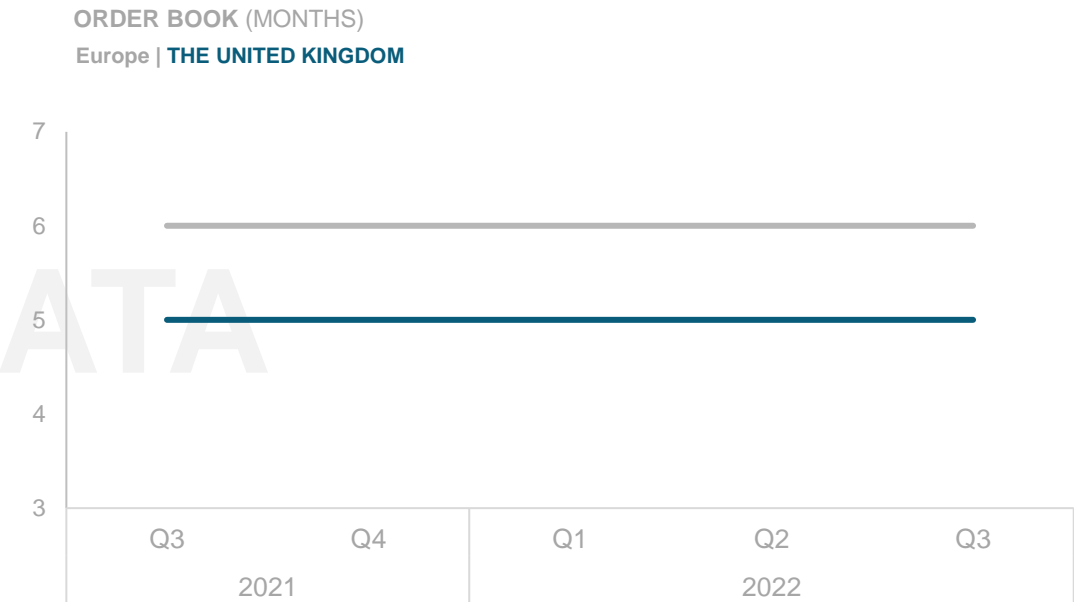
Q: If you compare your turnover of Q3-22 to the same quarter last year, how did your turnover develop? What are your expectations for the development in Q4-22?



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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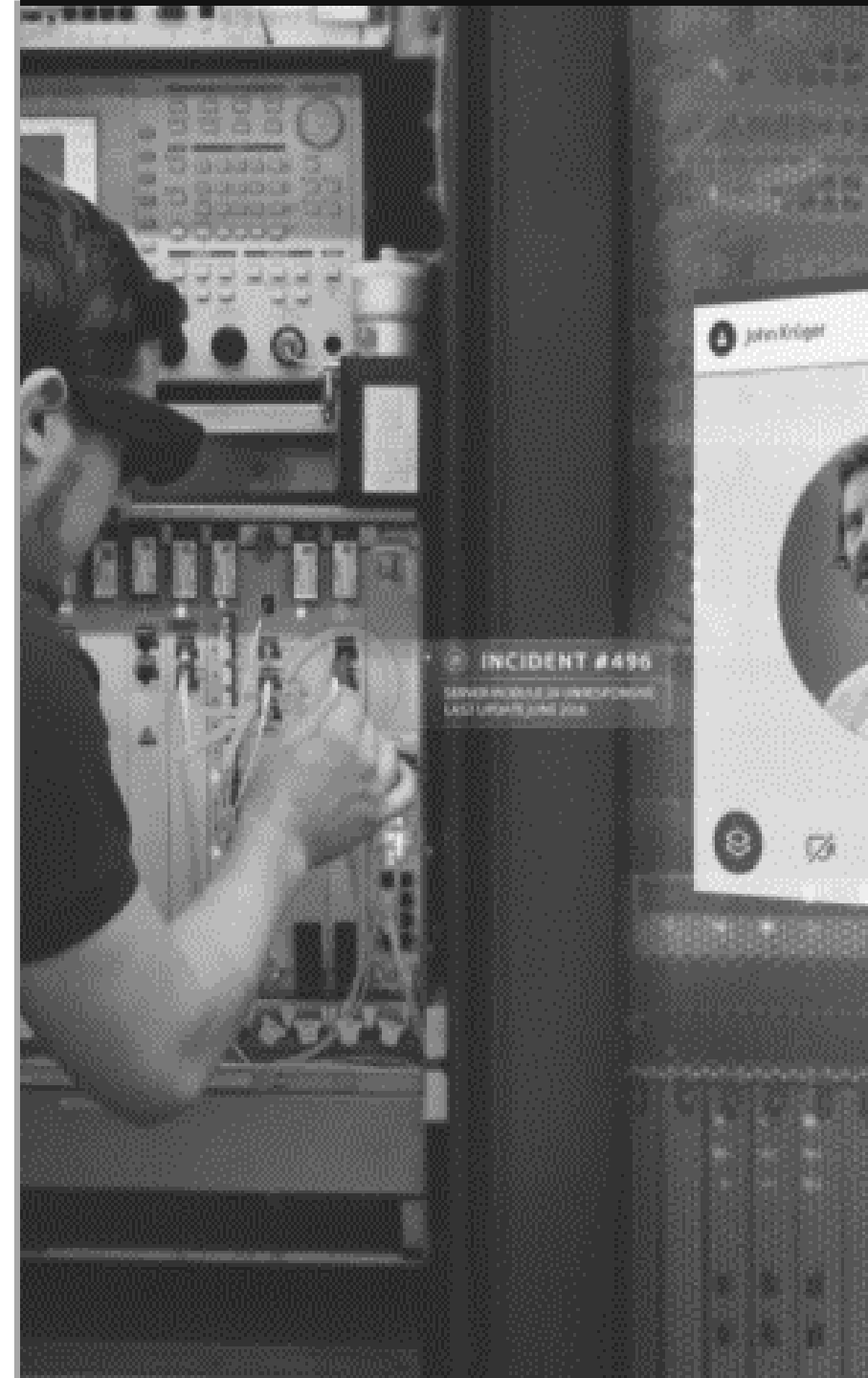
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## Interest in services from manufacturers

Question: Which of the following services would you like to receive from manufacturers of installation products?

[Scale of 1 (no interest) – 10 (high interest)]

## COMMERCIAL SERVICES

2020

2022

Tools / apps for **checking** product **availability** at wholesalers

6.6

6.0

Tools / apps to **exchange knowledge** or request services from other professionals

5.1

6.0

Self Service Portal / Service app for **easy service ordering**

5.2

6.0

## ENGINEERING

Digital tools for making **technical calculations**

5.8

6.0

Digital tools for **calculating energy savings**

5.4

6.0

Digital tools for deciding on **which products to use**

5.3

6.0

BIM support

3.5

6.0

## PRODUCTS &amp; INSTALLATIONS

Prefab solutions

5.9

6.0

Real-time installation support

6.2

6.0

Products which can be **monitored and serviced from distance**

5.3

6.0

Support via **Virtual / Augmented Reality**

4.7

6.0

Leasing of tools

3.7

6.0

Products for **leasing** instead of buying

3.2

6.0

## REPAIR &amp; MAINTENANCE

Spare parts **express** service

6.8

6.0

Notifications before breakdowns

6.1

6.0

Remote troubleshooting

5.8

6.0

Remote controlling and monitoring

5.6

6.0

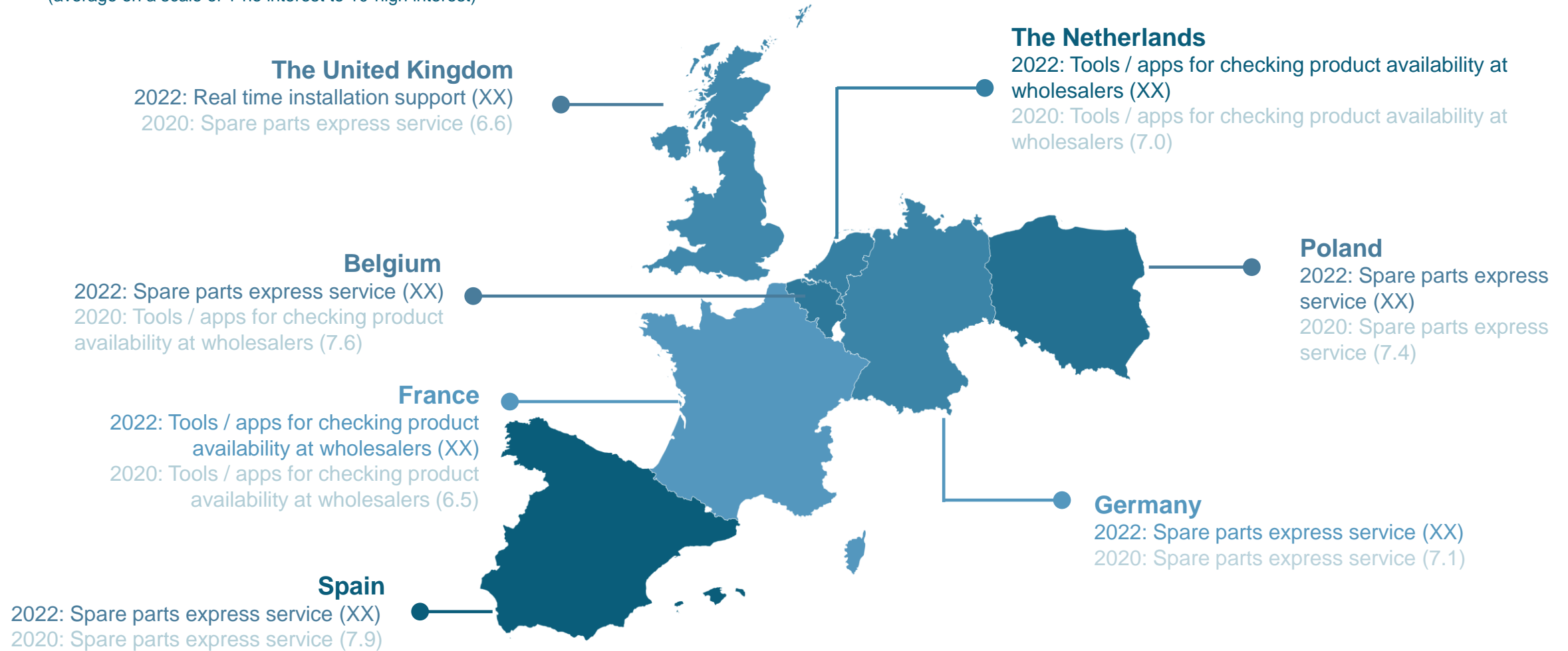
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**Most wanted service that installers would like to receive from manufacturers**

(average on a scale of 1-no interest to 10-high interest)



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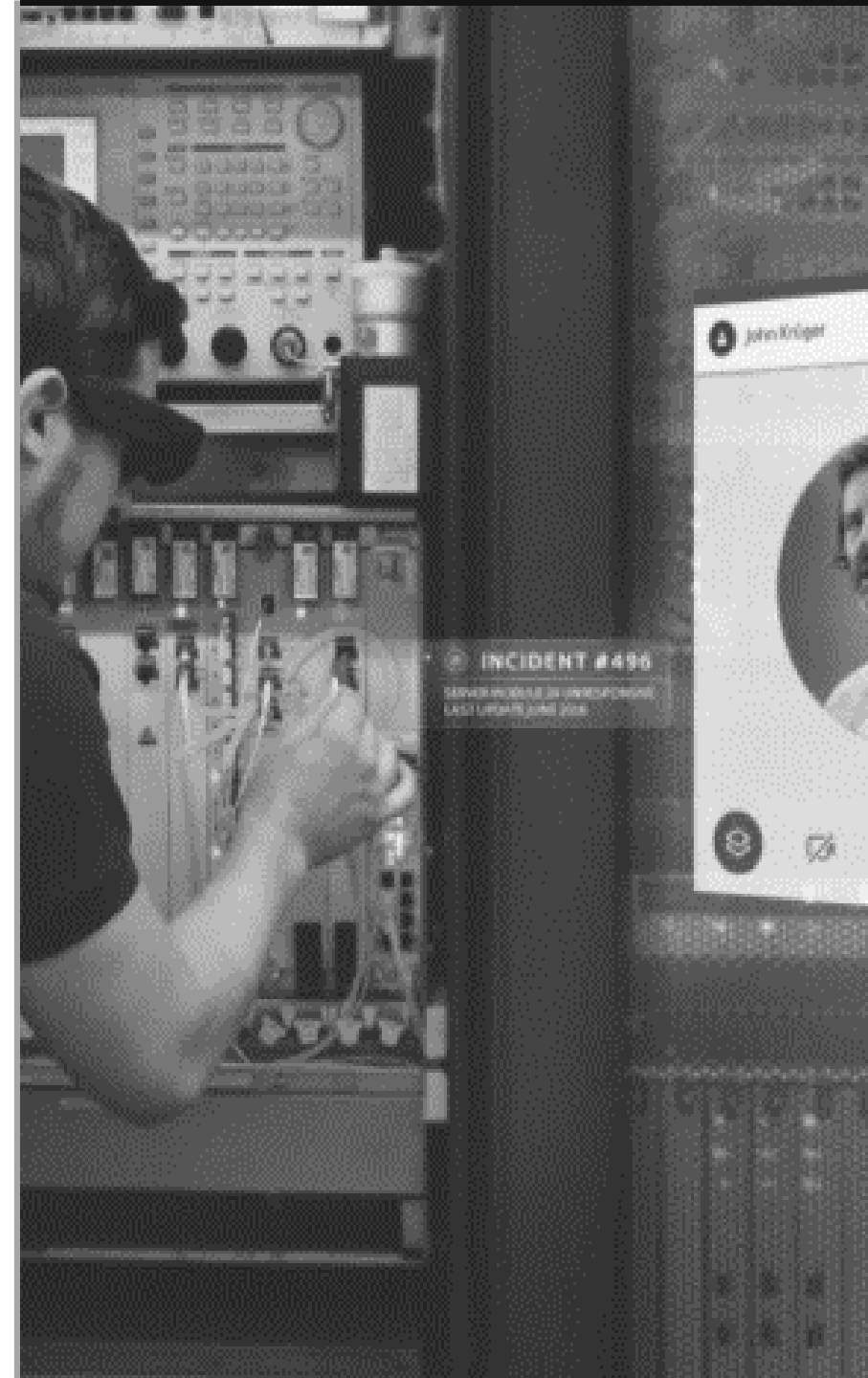
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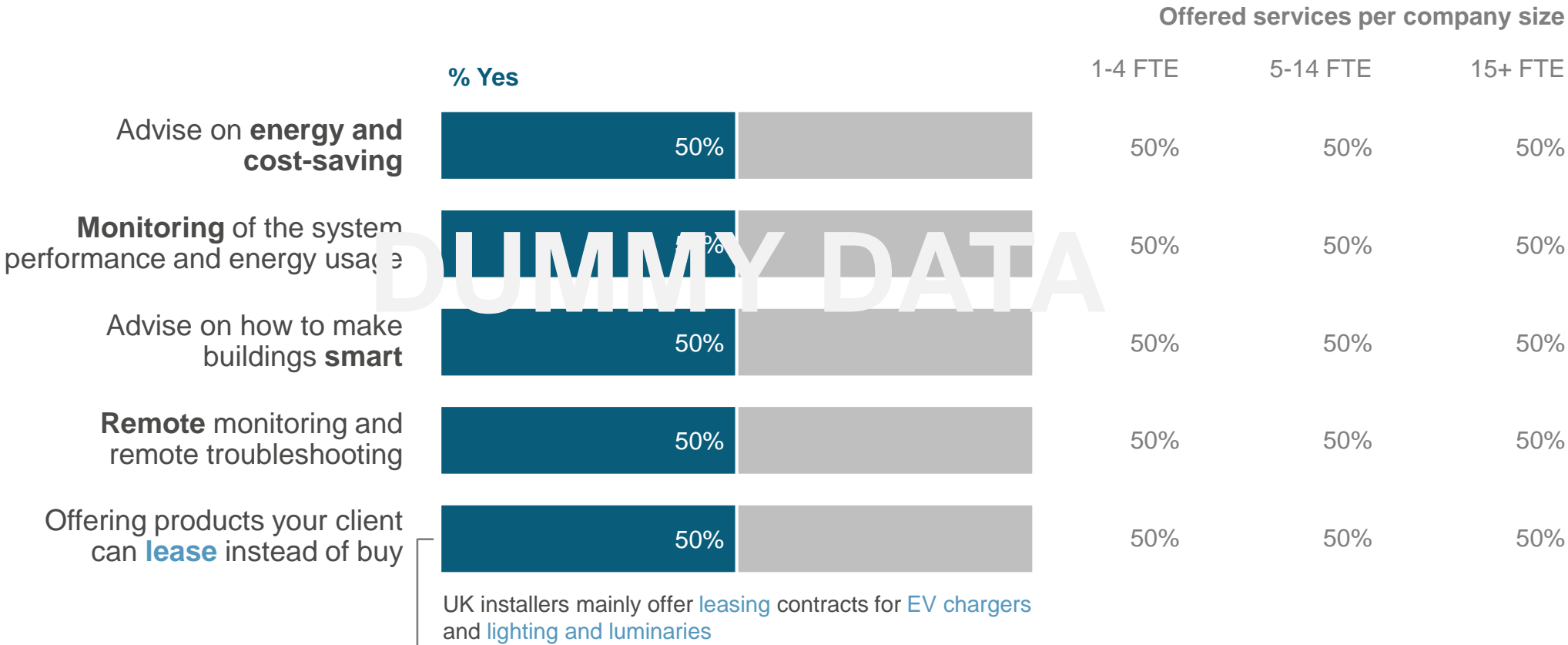


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Services installers offer to their clients

Question: In addition to the installation activities, which of the following services does your company offer to your clients?

Base: n= 125



Base: n=10

**Interest in services from manufacturers***Question: Which of the following services would you like to receive from manufacturers of installation products?**[Scale of 1 (no interest) – 10 (high interest)]***COMMERCIAL SERVICES****2020****2022**Tools / apps for **checking** product **availability** at wholesalers

6.2

6.0

Tools / apps to **exchange knowledge** or request services from other professionals

4.8

6.0

Self Service Portal / Service app for **easy service ordering**

4.4

6.0

**ENGINEERING**Digital tools for making **technical calculations**

5.4

6.0

Digital tools for **calculating energy savings**

5.1

6.0

Digital tools for deciding on **which products to use**

4.5

6.0

**BIM** support

3.3

6.0

**PRODUCTS & INSTALLATIONS**

Real-time installation support

5.9

6.0

Feedback option

5.4

6.0

Products which can be **monitored and serviced from distance**

4.3

6.0

Support via **Virtual / Augmented Reality**

4.0

6.0

**Leasing** of tools

3.0

6.0

**Products for leasing** instead of buying

2.4

6.0

**REPAIR & MAINTENANCE****Spare parts express** service

6.6

6.0

**Notifications** before breakdowns

5.5

6.0

**Remote troubleshooting**

5.3

6.0

**Remote controlling** and **monitoring**

4.8

6.0

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Top-1 per **company size**:

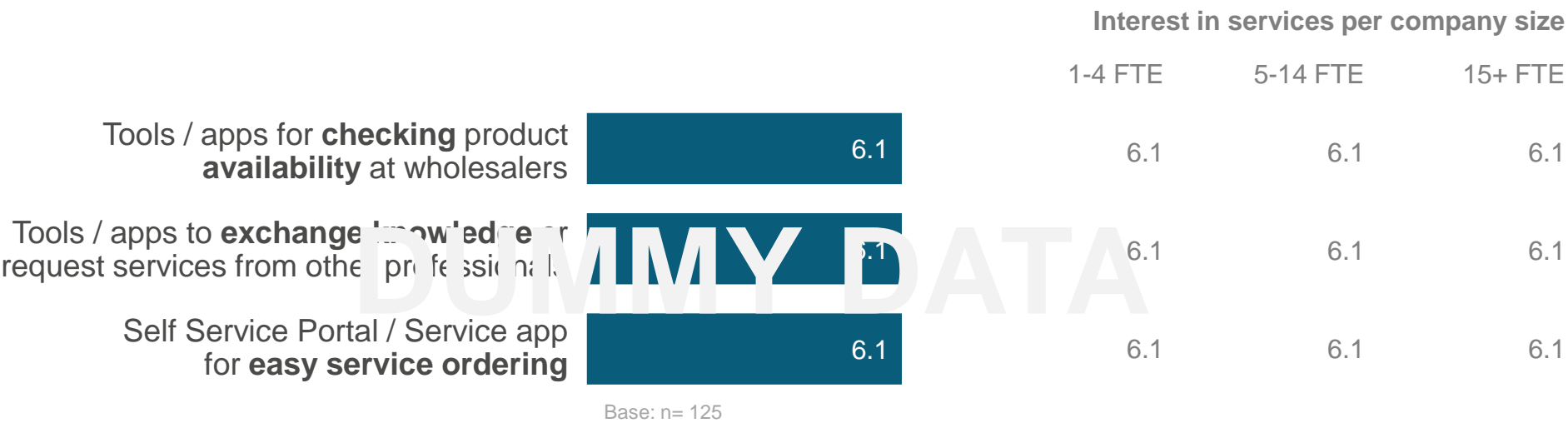
**Small:** XY**Medium:** XY**Big:** XY

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Interest in services from manufacturers related to the **COMMERCIAL** process

Question: Which of the following services would you like to receive from manufacturers of installation products?

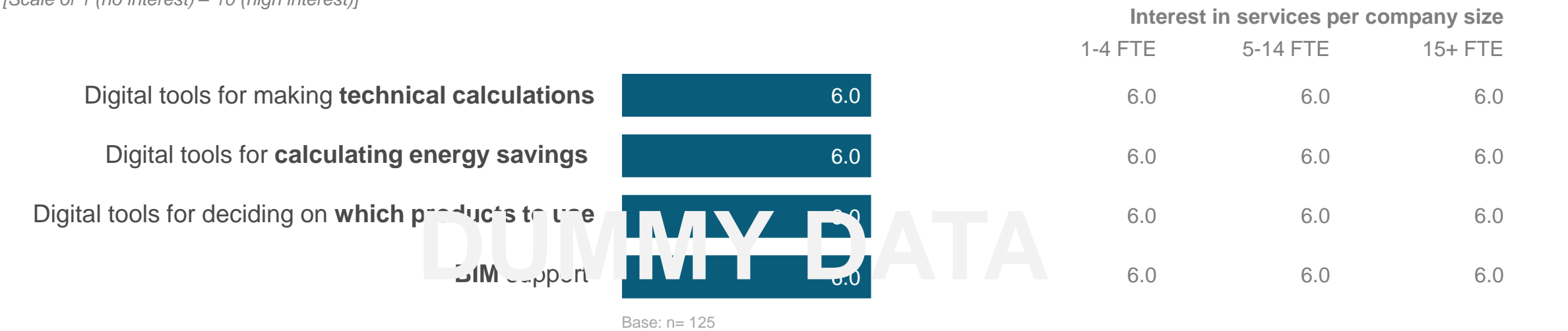
[Scale of 1 (no interest) – 10 (high interest)]



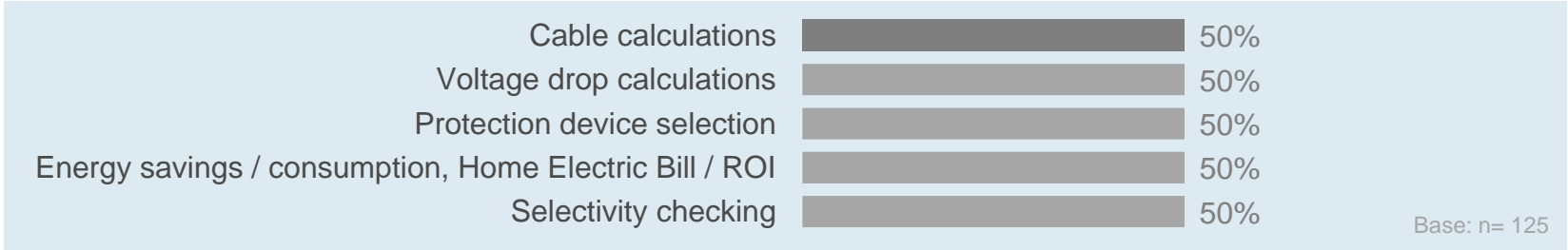
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**DIGITAL CALCULATION TOOLS:** Cable calculations are indicated as being the most helpful.

**Interest in services from manufacturers related to ENGINEERING**  
*Question: Which of the following services would you like to receive from manufacturers of installation products?*  
*[Scale of 1 (no interest) – 10 (high interest)]*



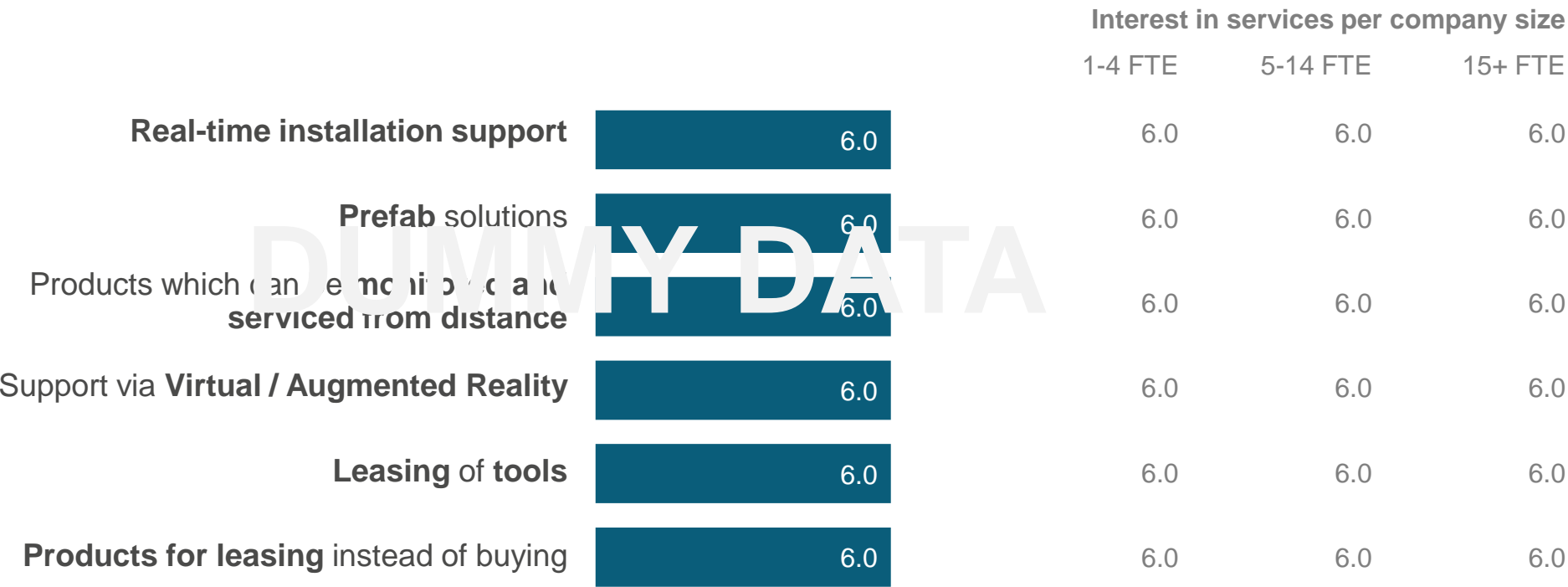
*Question: What kind of digital calculation tools would be most helpful for you? [Top 5]*





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Interest in services from manufacturers related to **PRODUCTS & INSTALLATIONS**  
Question: Which of the following services would you like to receive from manufacturers of installation products?  
[Scale of 1 (no interest) – 10 (high interest)]



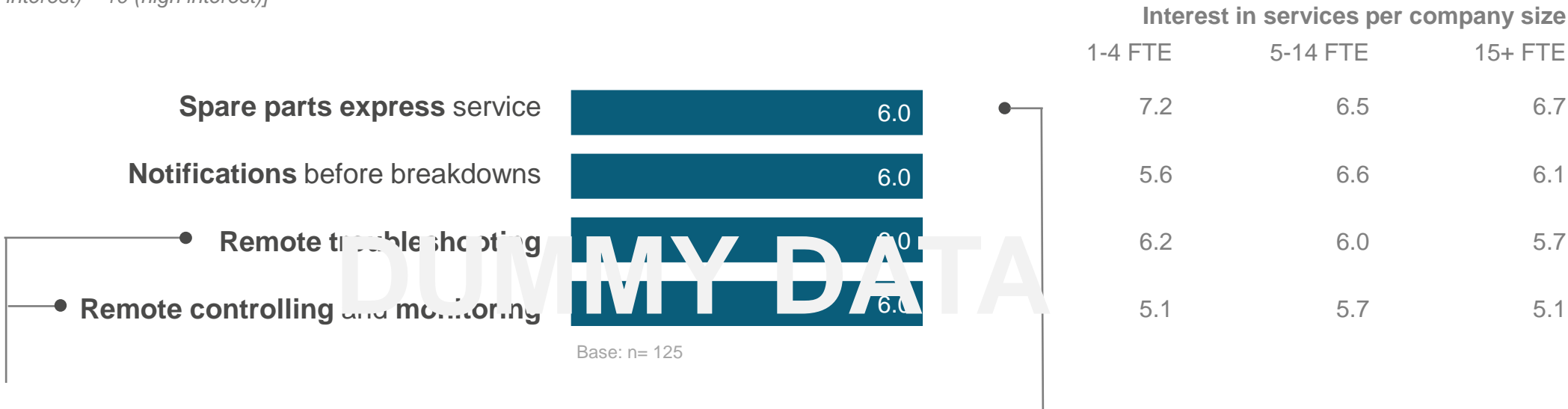
Base: n= 125

# Lorem ipsum dolor sit amet, consectetur adipiscing elit.

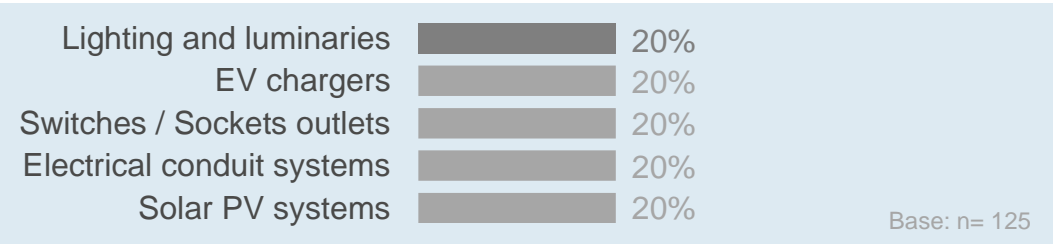
REMOTE MONITORING & TROUBLESHOOTING: Lorem ipsum dolor sit amet, consectetur adipiscing elit.

## Interest in services from manufacturers related to REPAIR & MAINTENANCE

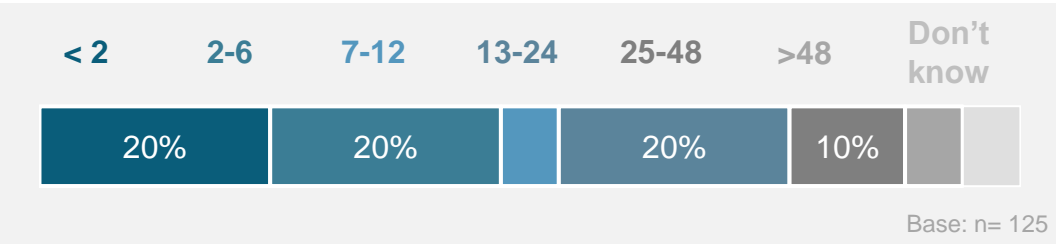
Question: Which of the following services would you like to receive from manufacturers of installation products?  
[Scale of 1 (no interest) – 10 (high interest)]



Question: For which electrical products would remote monitoring and troubleshooting be relevant? [Top 5]



Question: How fast [in hours] do you expect the spare part express service to be?



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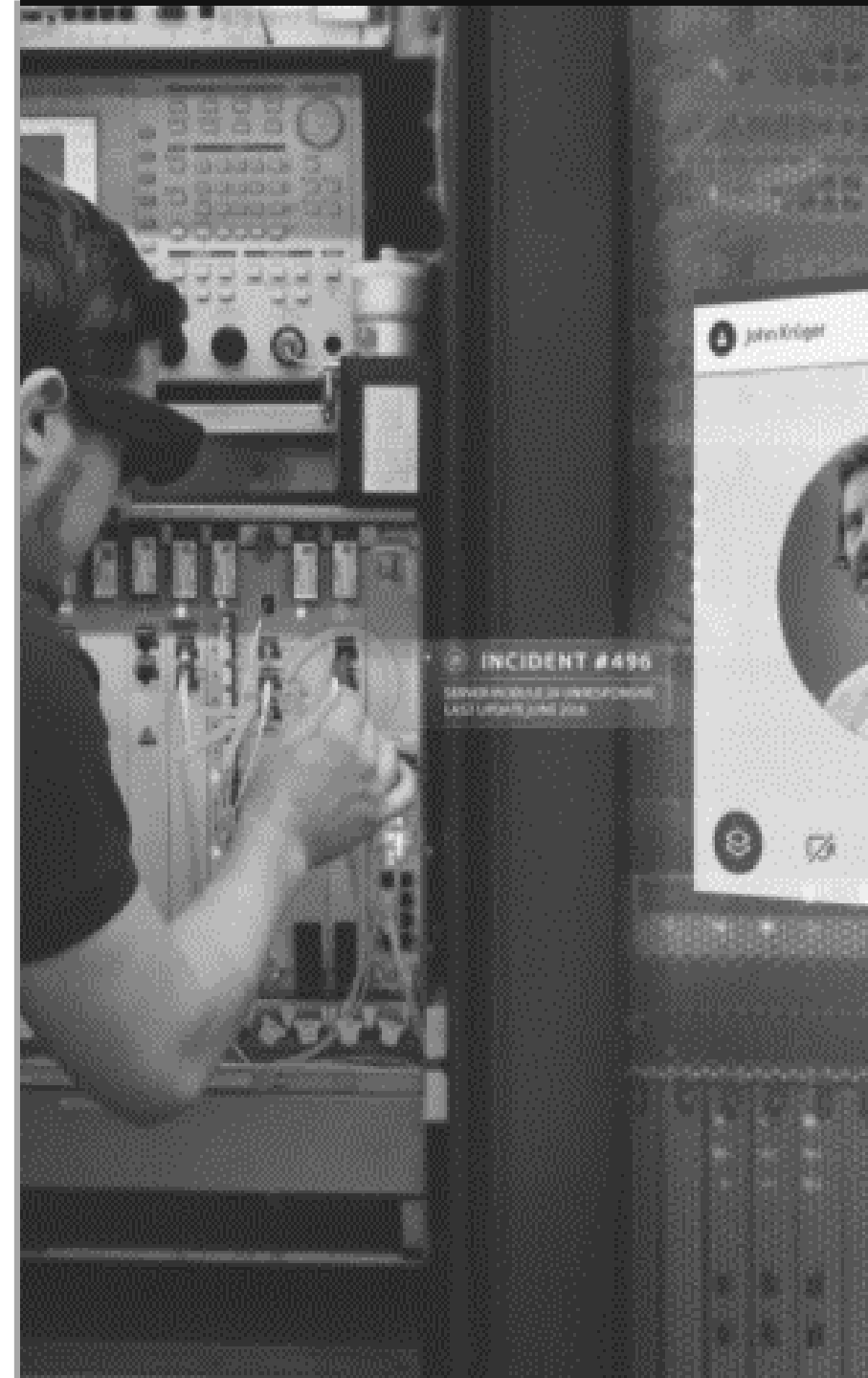
Poland

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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%

Q1 2022 data, unweighted

# About USP

## USP Marketing Consultancy



Head office



Subsidiaries



Rotterdam



Düsseldorf Zagreb



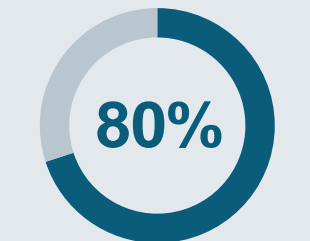
**Market specialist**  
installation, construction, home improvement and real estate

Dedicated and multi-client research

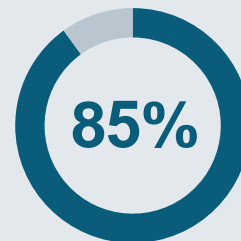
**Active in the market for 29 years**

250+ dedicated market research projects annually

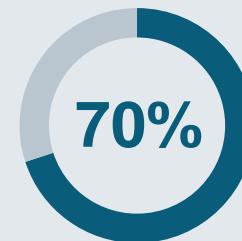
## Revenue distribution



turnover coming from international projects



turnover coming from **dedicated market research**, 15% from multi client



turnover coming from **B2B**, 30% B2C

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

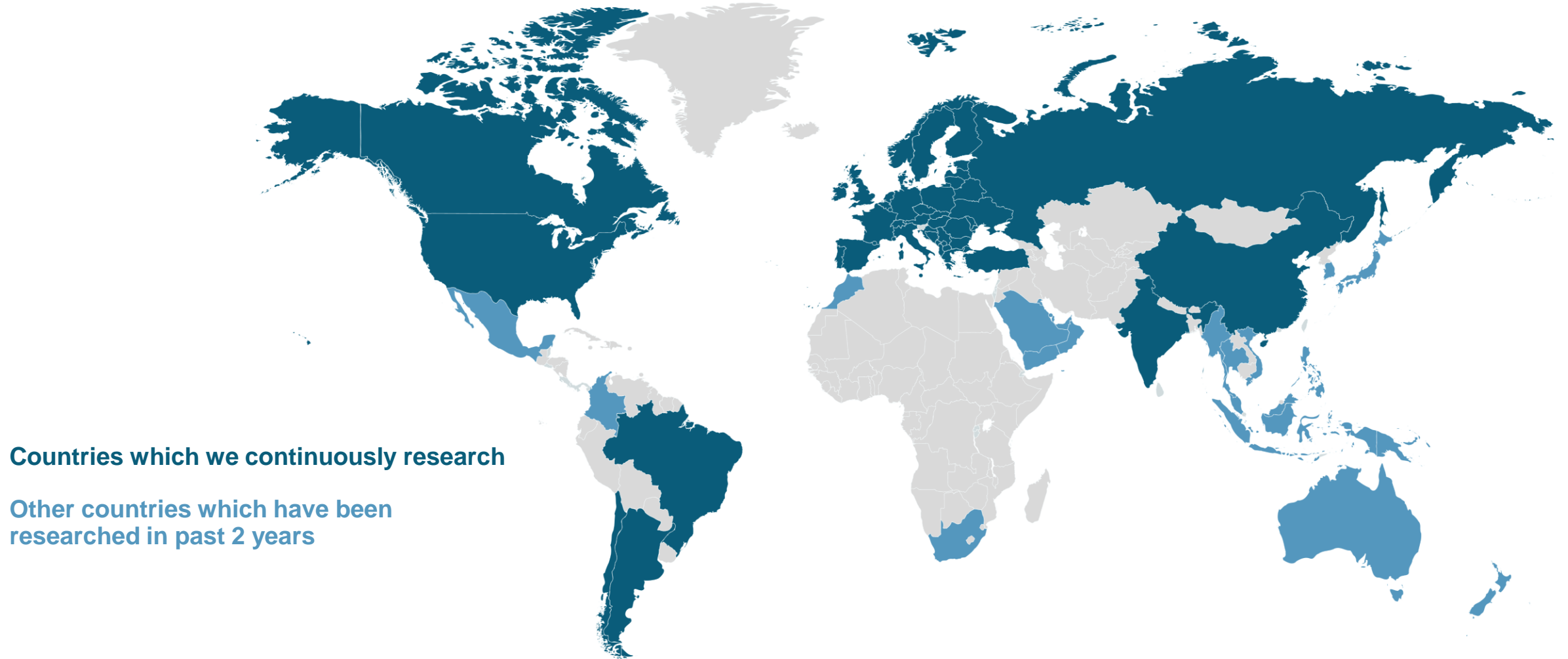
- Tailor made
- Driven by your information needs
- Advice & consultancy based on facts and over 25 years of experience in the industry
- Worldwide coverage
- B2B, B2C, qualitative and quantitative research or a combination of both
- Within our market specialism, all types of researches can be conducted
- 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> <li>• Austria</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



# Principals of USP

Installation				DIY		Construction	
		GIRA				ASSA ABLOY	
							
			KALDEWEI				
							Interface®
							
							
							

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