



European Electrical Installation Monitor Q4-2022

Theme topic: Brand Scan

Jan-2023

A product by **USP** Marketing Consultancy

Index

About European Electrical Installation Monitor

Key takeaways

Profile of the electrical installer

Business development

Theme topic – Brand Scan

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Spain

Appendix



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 795 phone interviews (per quarter) with registered electrical installation companies, divided over 7 major European markets.

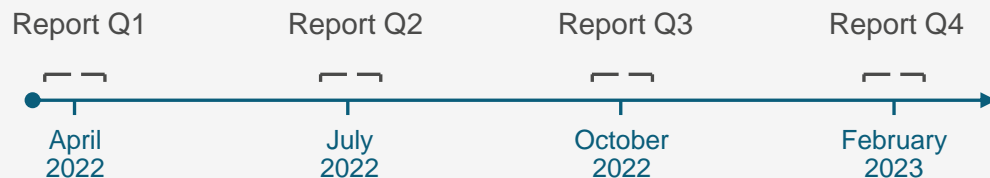
THE RESEARCH TOPICS

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**

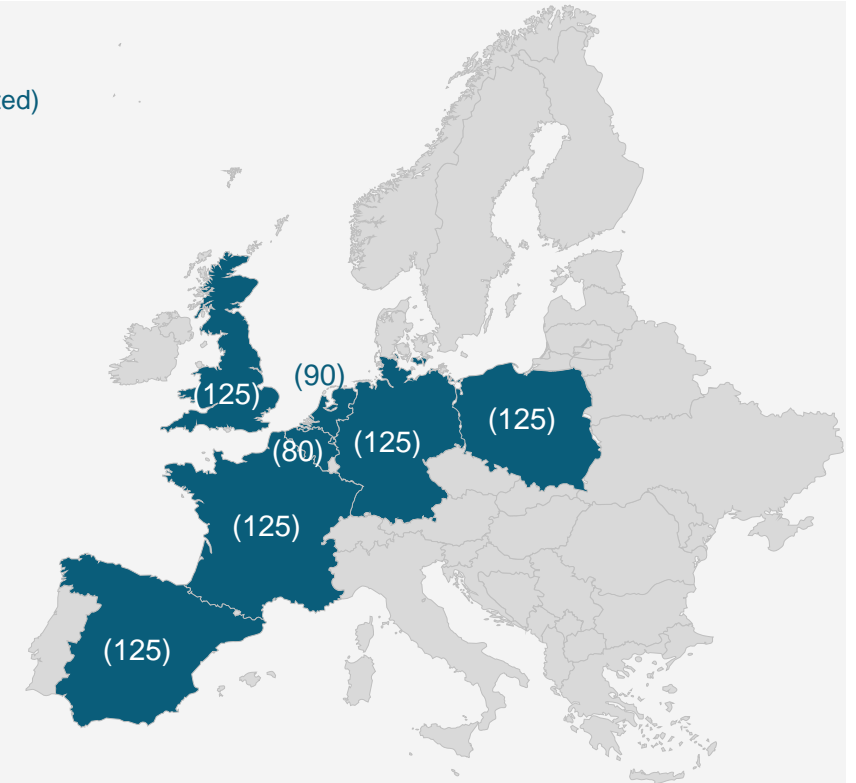
THE TIMELINE



COUNTRY SCOPE

(number of interviews conducted)

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



PROJECT TEAM



Maja Markovic

Project Manager

+31 682834333

m.markovic@usp-mc.nl



Valentino Vlahovic

Research Analyst

vlahovic@usp-mc.nl



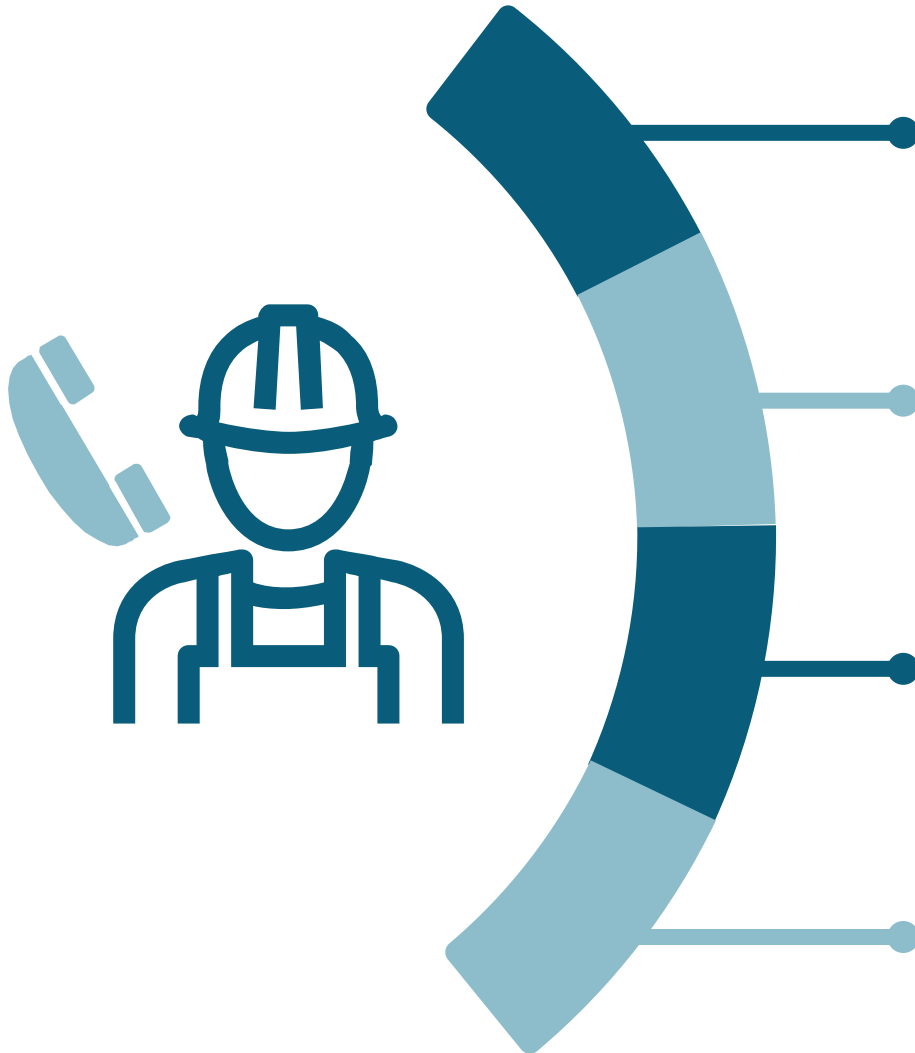
Dirk Hoogenboom

Research consultant

+31 652098924

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 Q4 theme topic



Surveying the branding topic...

For manufacturers, it is very important to know how familiar installers are with their brand. And if known, to what extent the brand is used and preferred.

With this information, the marketing budget can be allocated more precisely; it shows you whether you should invest in creating brand awareness or focus on making your customers loyal to your brand.

...allows for a better understanding of your brand position in the market

For several product groups, installers work with (with a maximum of four product groups), installers were subsequently asked which brands they know (spontaneously, brand names were not read out), which brands they regularly use and which brands they prefer.

The brands can be compared with the competition and country comparisons can be made, indicating very well at which stage your brand wins (high conversion rates) or loses customers (low conversion rates). The outcomes of this research indicate where you have to focus on in your marketing and communication activities, e.g. do you need to increase brand awareness, do you have to focus on a brand image campaign or do you have to work on your customer satisfaction in order to become a preferred brand?

Index

About European Electrical Installation Monitor

Key takeaways

Profile of the electrical installer

Business development

Theme topic – Brand Scan

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Spain

Appendix



Key takeaways



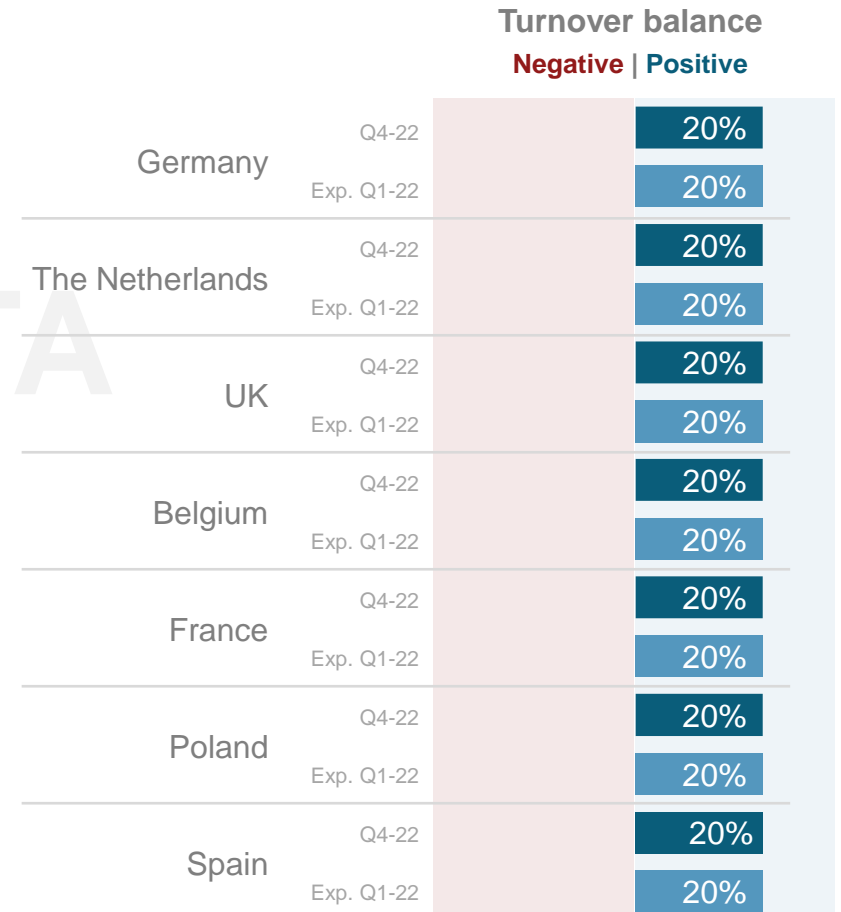
Business Development

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

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

DUMMY DATA



Key takeaways

2

Brand scan in the electrical installation sector

- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

Leading brands in the electrical installation sector – Top 5 in Europe

#1  Schneider
Electric

#2  legrand

#3  :hager

#4  ABB
BUSCH-JAEGER

#5  GIRA

Index

About European Electrical Installation Monitor

Key takeaways

Profile of the electrical installer

Business development

Theme topic – Brand Scan

United Kingdom

Germany

France

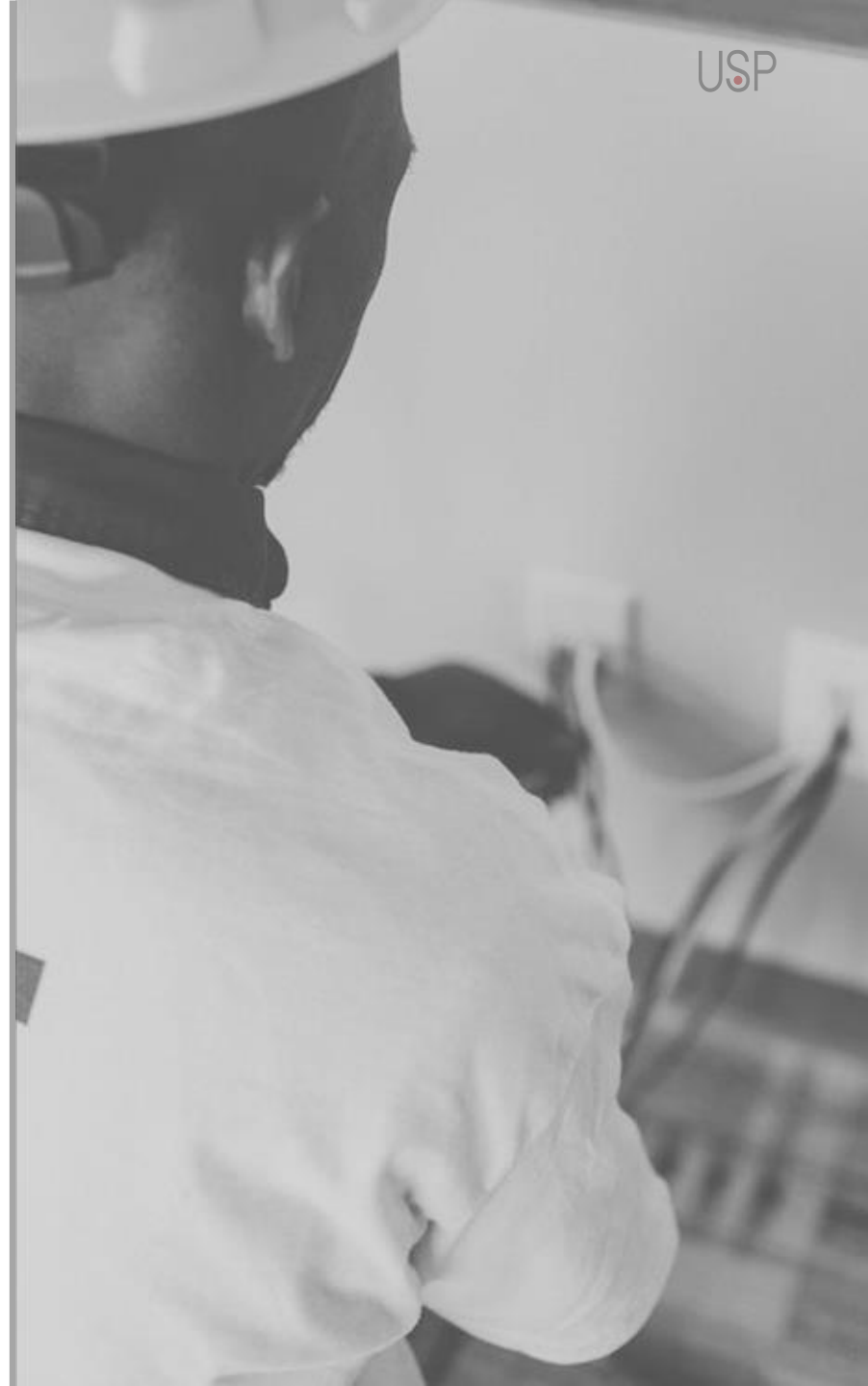
Poland

Belgium

The Netherlands

Spain

Appendix



Electrical installation companies offer various electrical services

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

Electrical installation **activities** installers are involved in [Q4 2022]

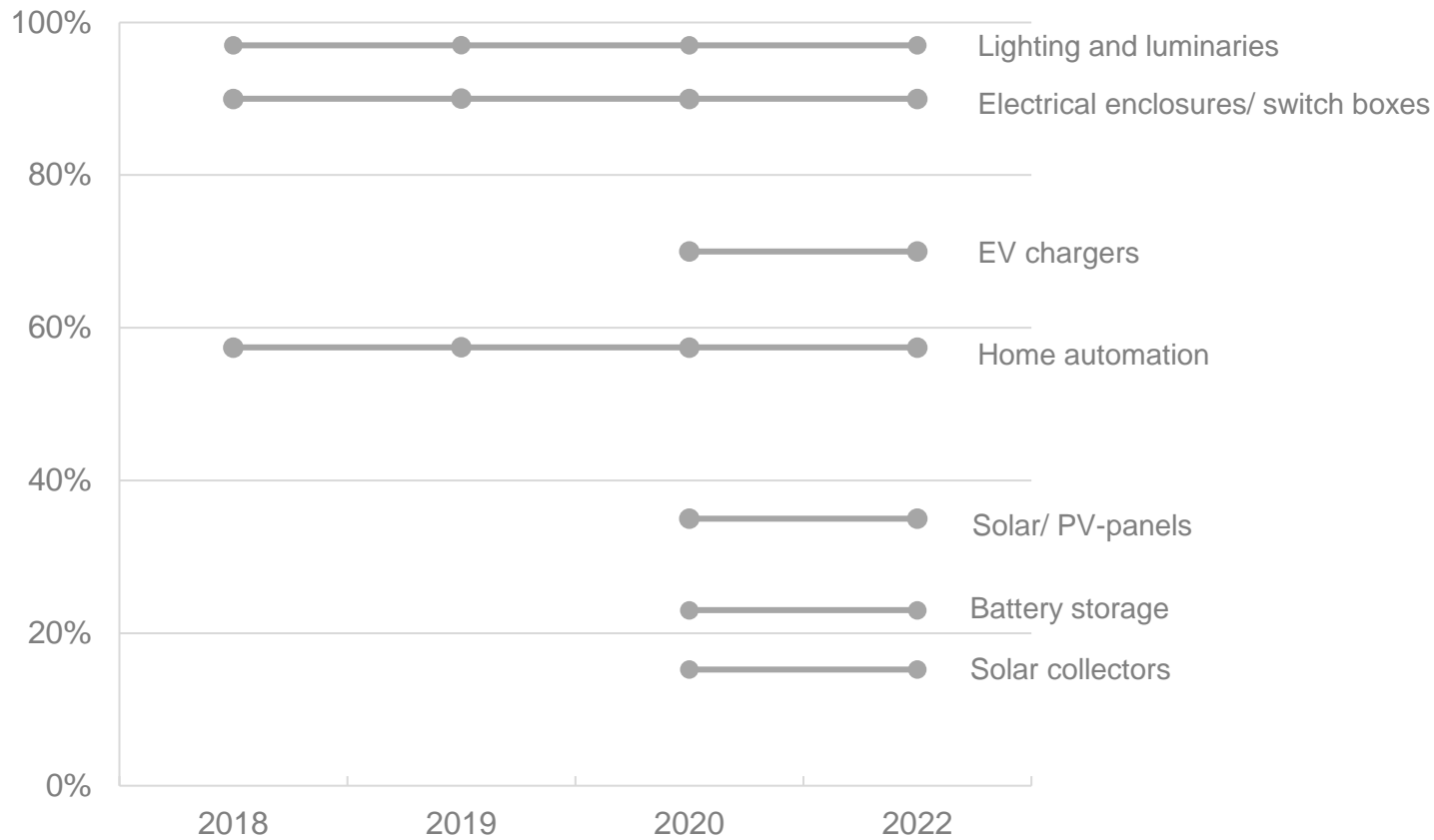
Q: Does your company do the following activities?

	UK	Germany	France	Poland	Belgium	Netherlands	Spain
Electrical enclosures/ switch boxes	50%	50%	50%	50%	50%	50%	50%
Lighting and luminaries	50%	50%	50%	50%	50%	50%	50%
Home automation	50%	50%	50%	50%	50%	50%	50%
EV charging stations	50%	50%	50%	50%	50%	50%	50%
Electrical panels	50%	50%	50%	50%	50%	50%	50%
Solar/ PV-panels	50%	50%	50%	50%	50%	50%	50%
Battery storage	50%	50%	50%	50%	50%	50%	50%
Solar collectors	50%	50%	50%	50%	50%	50%	50%

DUMMY DATA

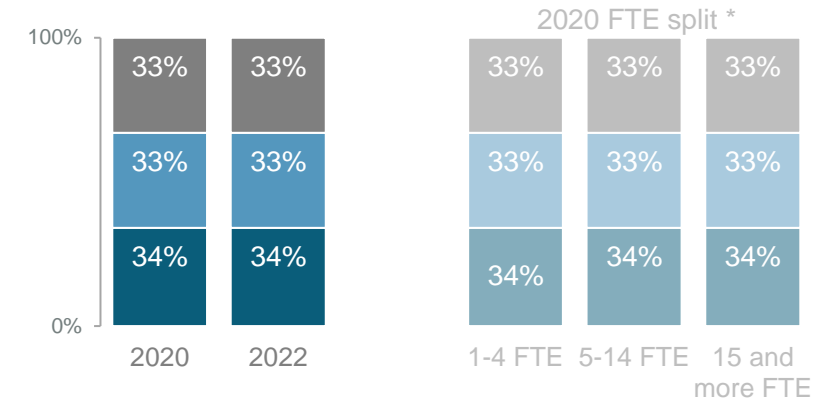
DUMMY DATA

Installation **activities** electrical installers are involved in [Trend]



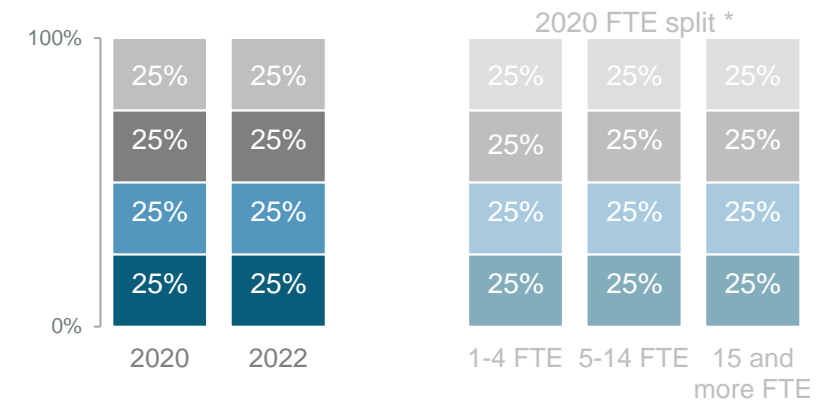
Turnover distribution per **project type**

New build | **Renovation** | Maintenance (planned/ ad-hoc)



Turnover distribution per **segment**

Residential | **Commercial** | Industrial | Infrastructural



*Based on Q4 data only

Index

About European Electrical Installation Monitor

Key takeaways

Profile of the electrical installer

Business development

Theme topic – Brand Scan

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Spain

Appendix

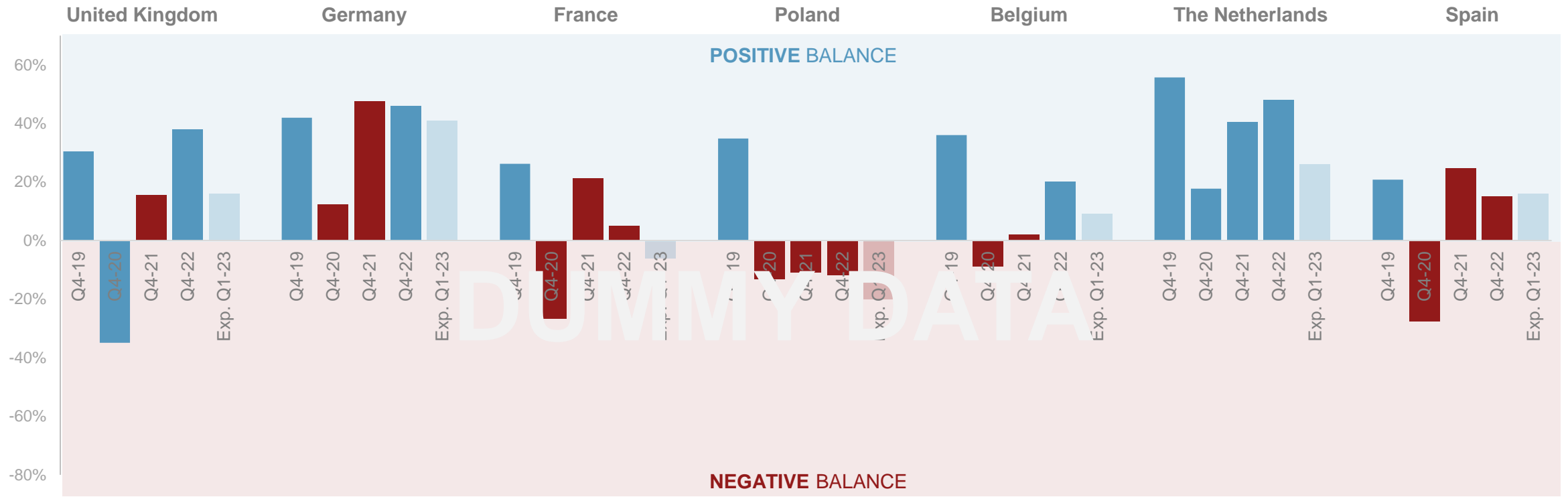


Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Turnover balance

Q: If you compare your turnover of Q4-22 to the same quarter last year, how did your turnover develop?

(% INCREASE minus % DECREASE)

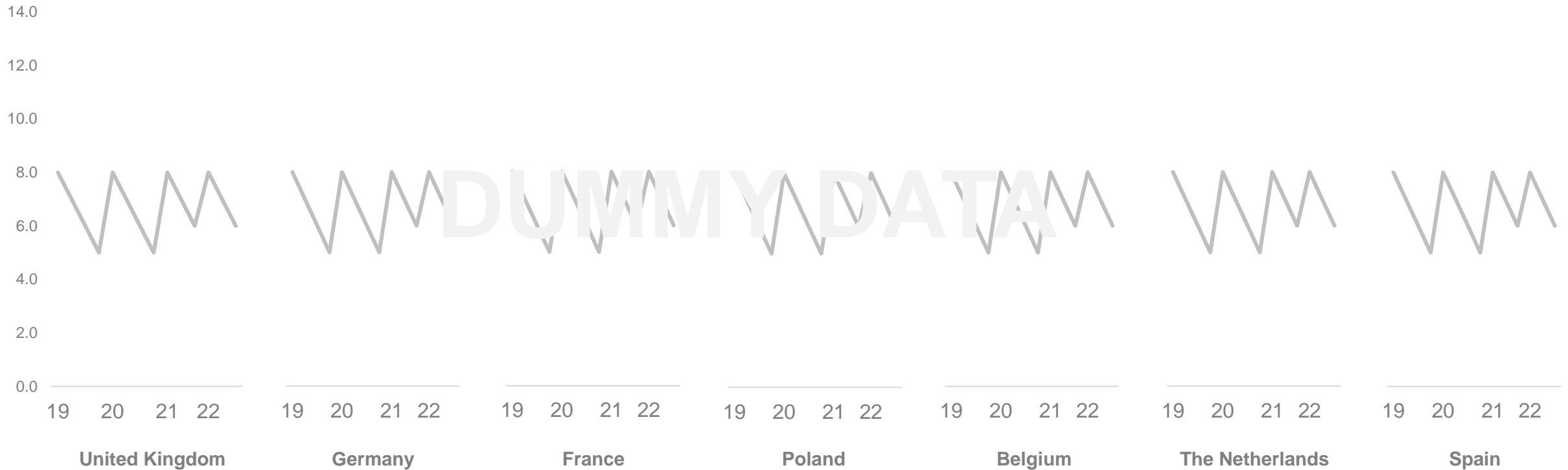


Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

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)

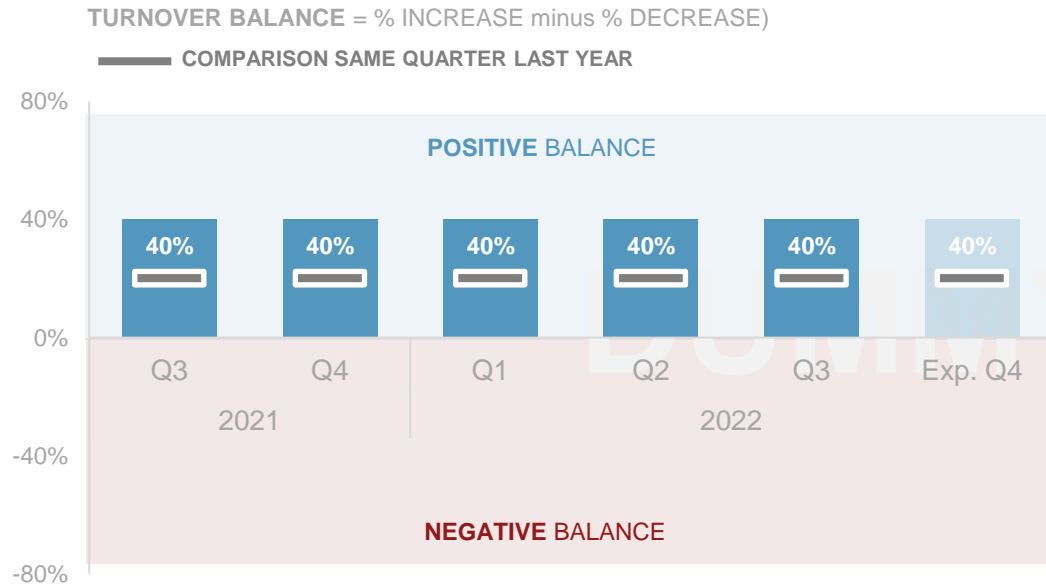


Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Turnover balance

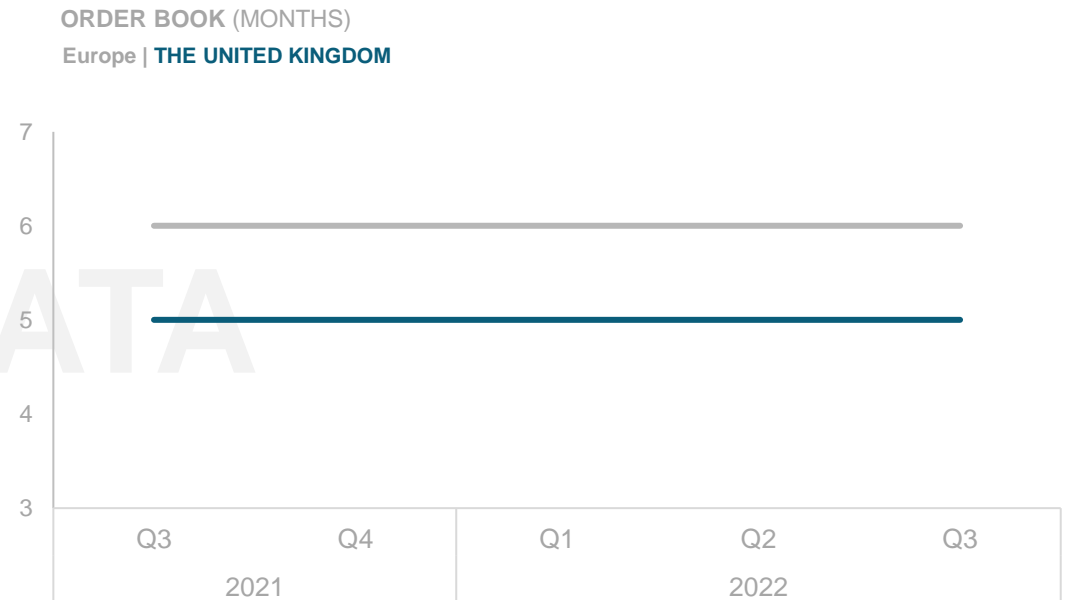
Q: If you compare your turnover of Q4-22 to the same quarter last year, how did your turnover develop? What are your expectations for the development in Q1-23?



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

Order book portfolio

Q: How big is your current order book portfolio?



Index

About European Electrical Installation Monitor

Key takeaways

Profile of the electrical installer

Business development

Theme topic – Brand Scan

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Spain

Appendix



Leading brands in the electrical installation sector

Q: In general, which brand(s) do you consider to be leaders in the electrical installation industry in #country#? (Top-3)

	United Kingdom	Germany	France	Poland	Belgium	Netherlands	Spain
#1	<LOGO>	<LOGO>	<LOGO>	<LOGO>	<LOGO>	<LOGO>	<LOGO>
#2	<LOGO>	<LOGO>	<LOGO>	<LOGO>	<LOGO>	<LOGO>	<LOGO>
#3	<LOGO>	<LOGO>	<LOGO>	<LOGO>	<LOGO>	<LOGO>	<LOGO>



DUMMY DATA

Brand specification

Key decision-maker

Never | Brand specified
at least once

United Kingdom	50%	50%
Germany	50%	50%
France	50%	50%
Poland	50%	50%
Belgium	50%	50%
Netherlands	50%	50%
Spain	50%	50%

Lorem ipsum
 Lorem ipsum
 Lorem ipsum
 Lorem ipsum
 Lorem ipsum
 Lorem ipsum
 Lorem ipsum

Product category
SWITCHES & SOCKETS



Index

About European Electrical Installation Monitor

Key takeaways

Profile of the electrical installer

Business development

Theme topic – Brand scan

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Spain

Appendix



THE BRAND FUNNEL SCAN

SCAN OF BRAND PERFORMANCE AMONG ELECTRICAL INSTALLERS

THE BRAND FUNNEL

A frequently used marketing tool has been reported for each country: ‘the brand funnel’. This model shows the level of spontaneous brand awareness, brand usage, and brand preference. As such, this model gives a detailed overview of the key players per country, for specific products used by electrical installers.

For any relevant manufacturer, it is key to first create (spontaneous) awareness among installers. Once an installer knows the brand, it should be used. The final step is that when an installer uses several brands, there will always be one preferred brand. The installer is more likely to buy this brand again next time.

In this report, the brand funnel has been constructed for the top-7 brands per product group in each country. One important point for interpretation is that all questions have been asked unprompted; the installer was not prompted to name any specific brand. Instead, the installer could only spontaneously mention the brands that came to his mind.

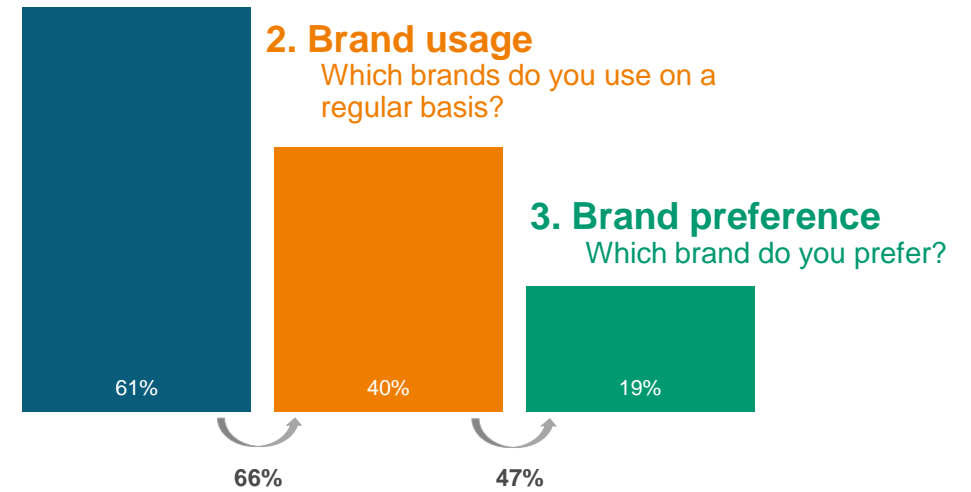
PRODUCT GROUPS INCLUDED

- 1. Switches & socket outlets
- 2. Lighting (lighting source)
- 3. Electrical enclosures
- 4. Home automation systems
- 5. Electrical heating
- 6. Electrical pipes
- 7. Power tools

HOW TO READ THE RESULTS

1. Spontaneous awareness

Which brands do you know?



Conversions

The ratios below the graph indicate the conversion; which share of the installers that know a brand also uses that brand? A low percentage indicates a major drop out, and that action is required.

Switches & socket outlets IN United Kingdom

METHODOLOGY

3 QUESTIONS WERE ASKED TO ELECTRICAL INSTALLERS...

1. Spontaneous awareness

Which brands do you know?

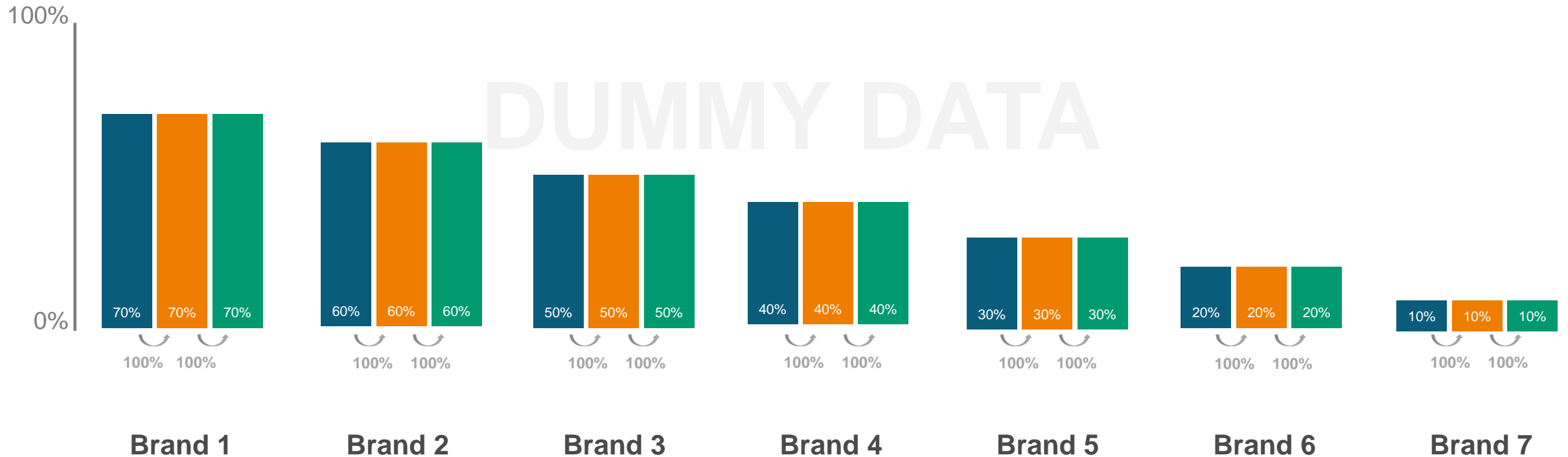
2. Brand usage

Which brands do you use on a regular basis?

3. Brand preference

Which brand do you prefer?

RESULTS FOR THE MOST MENTIONED BRANDS



Lighting IN United Kingdom

METHODOLOGY

3 QUESTIONS WERE ASKED TO ELECTRICAL INSTALLERS...

1. Spontaneous awareness

Which brands do you know?

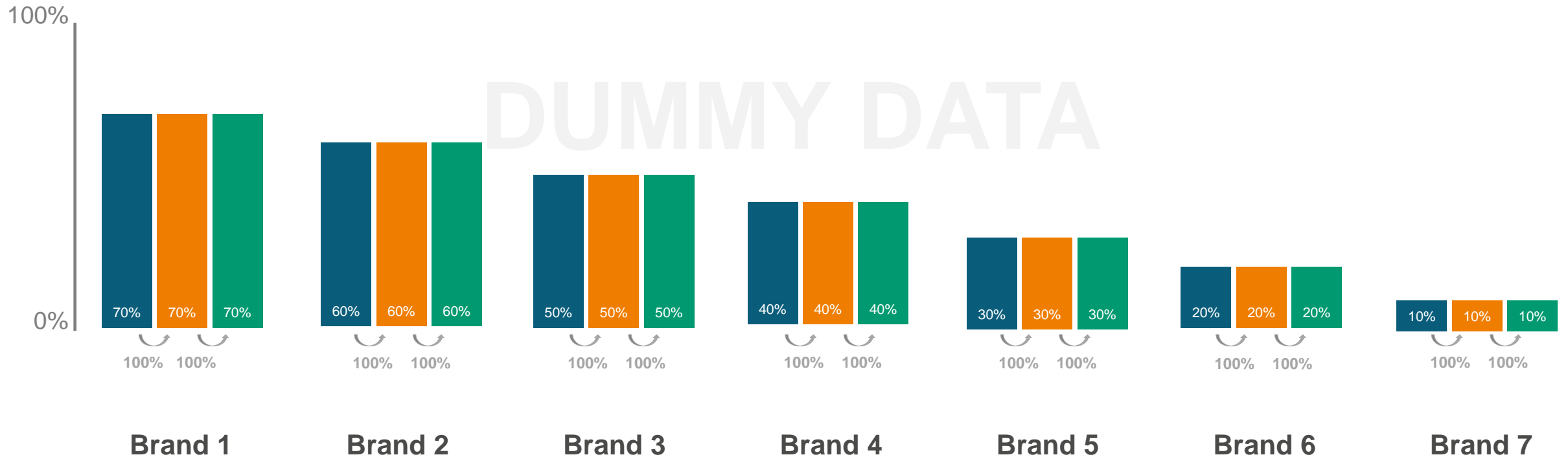
2. Brand usage

Which brands do you use on a regular basis?

3. Brand preference

Which brand do you prefer?

RESULTS FOR THE MOST MENTIONED BRANDS



Electrical enclosures IN United Kingdom

METHODOLOGY

3 QUESTIONS WERE ASKED TO ELECTRICAL INSTALLERS...

1. Spontaneous awareness

Which brands do you know?

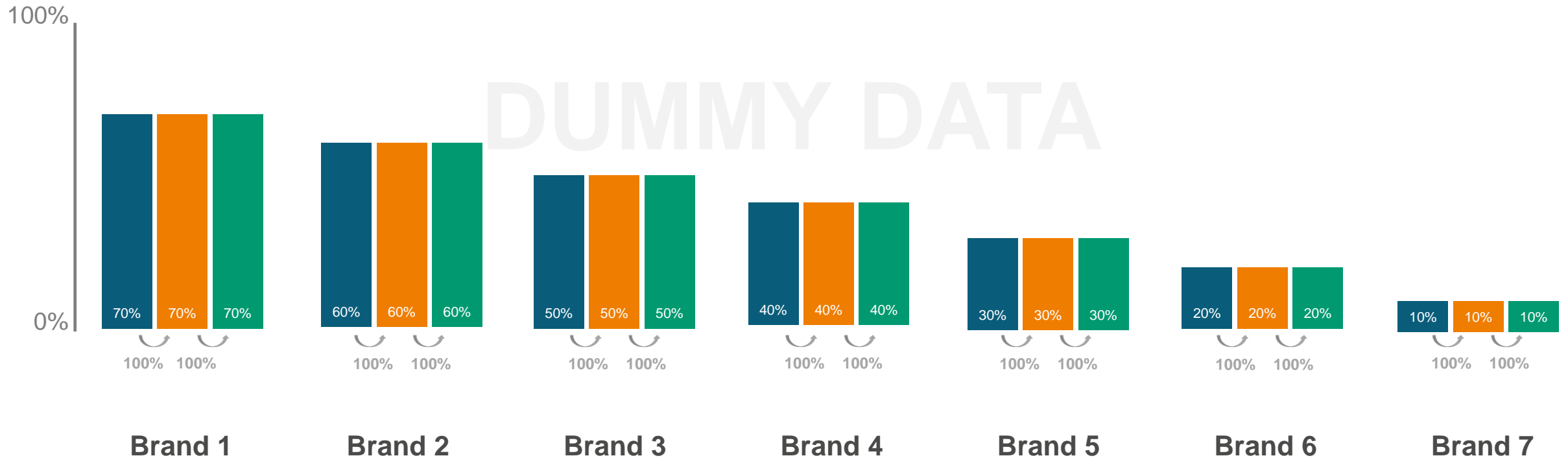
2. Brand usage

Which brands do you use on a regular basis?

3. Brand preference

Which brand do you prefer?

RESULTS FOR THE MOST MENTIONED BRANDS



Home automation systems installations IN United Kingdom

METHODOLOGY

3 QUESTIONS WERE ASKED TO ELECTRICAL INSTALLERS...

1. Spontaneous awareness

Which brands do you know?

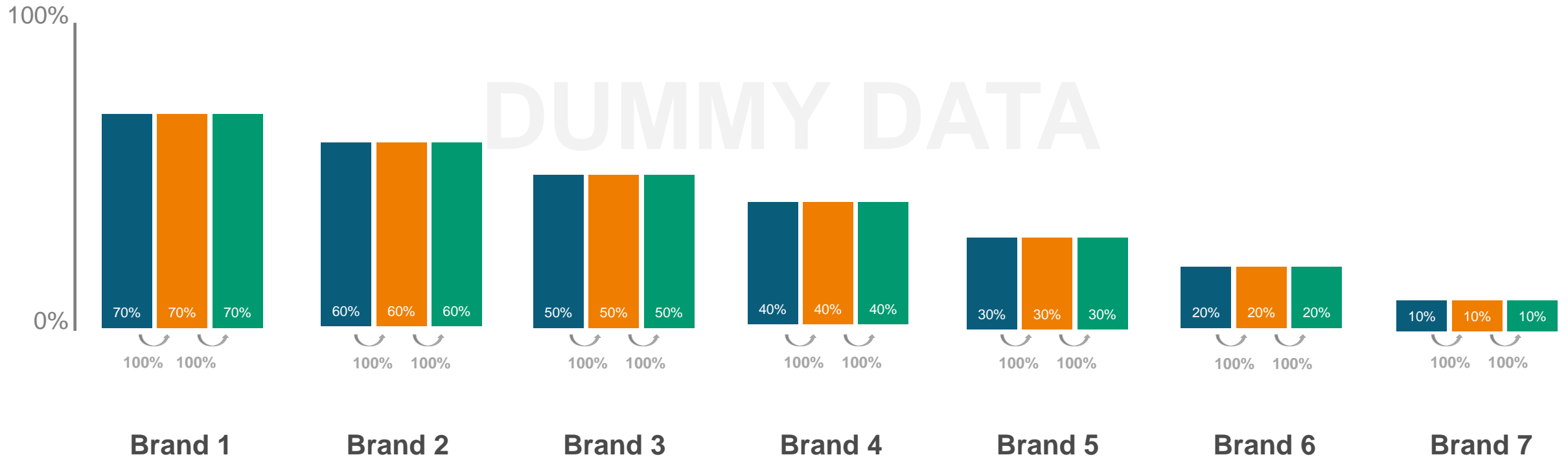
2. Brand usage

Which brands do you use on a regular basis?

3. Brand preference

Which brand do you prefer?

RESULTS FOR THE MOST MENTIONED BRANDS



Electrical heating IN United Kingdom

METHODOLOGY

3 QUESTIONS WERE ASKED TO ELECTRICAL INSTALLERS...

1. Spontaneous awareness

Which brands do you know?

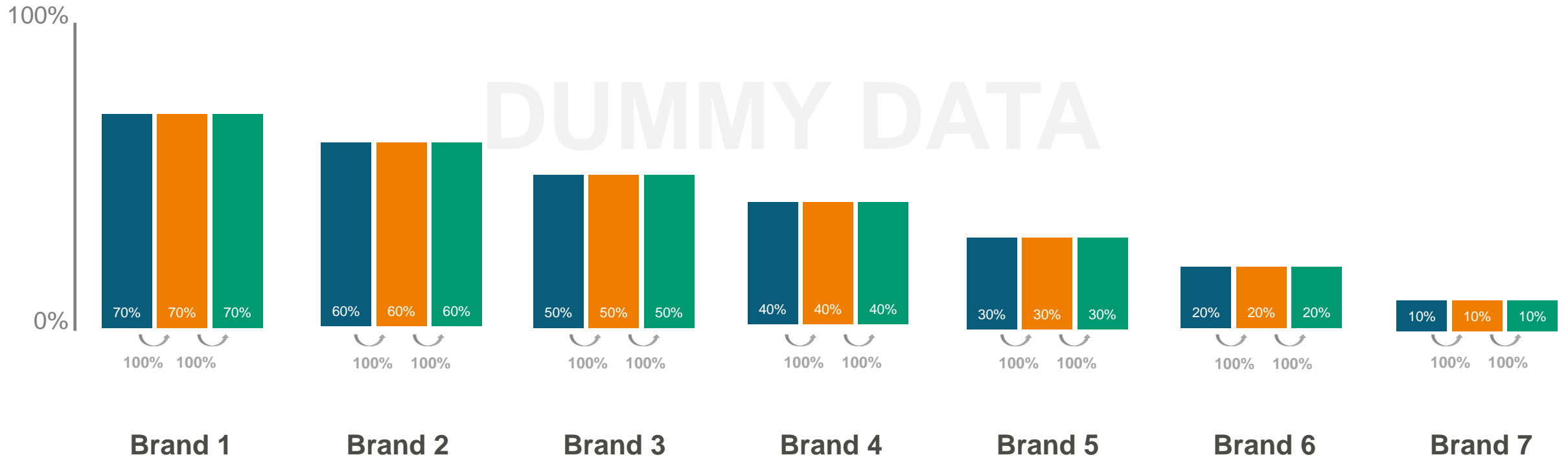
2. Brand usage

Which brands do you use on a regular basis?

3. Brand preference

Which brand do you prefer?

RESULTS FOR THE MOST MENTIONED BRANDS



Electrical pipes/ conduit (pipes for electrical installation) IN United Kingdom

METHODOLOGY

3 QUESTIONS WERE ASKED TO ELECTRICAL INSTALLERS...

1. Spontaneous awareness

Which brands do you know?

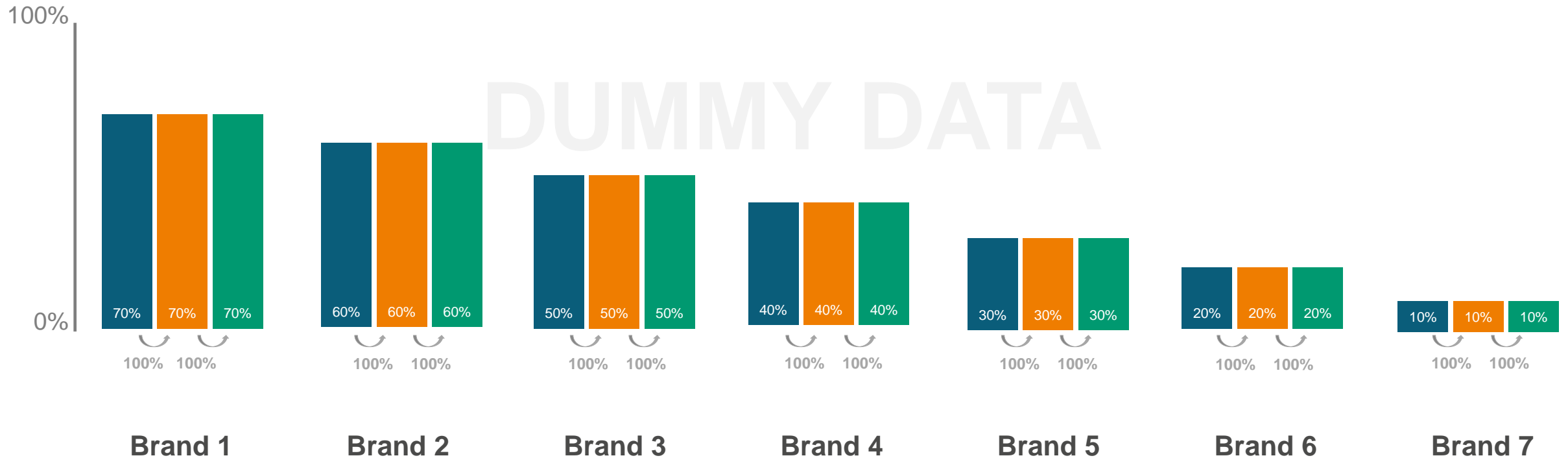
2. Brand usage

Which brands do you use on a regular basis?

3. Brand preference

Which brand do you prefer?

RESULTS FOR THE MOST MENTIONED BRANDS



Power tools IN United Kingdom

METHODOLOGY

3 QUESTIONS WERE ASKED TO ELECTRICAL INSTALLERS...

1. Spontaneous awareness

Which brands do you know?

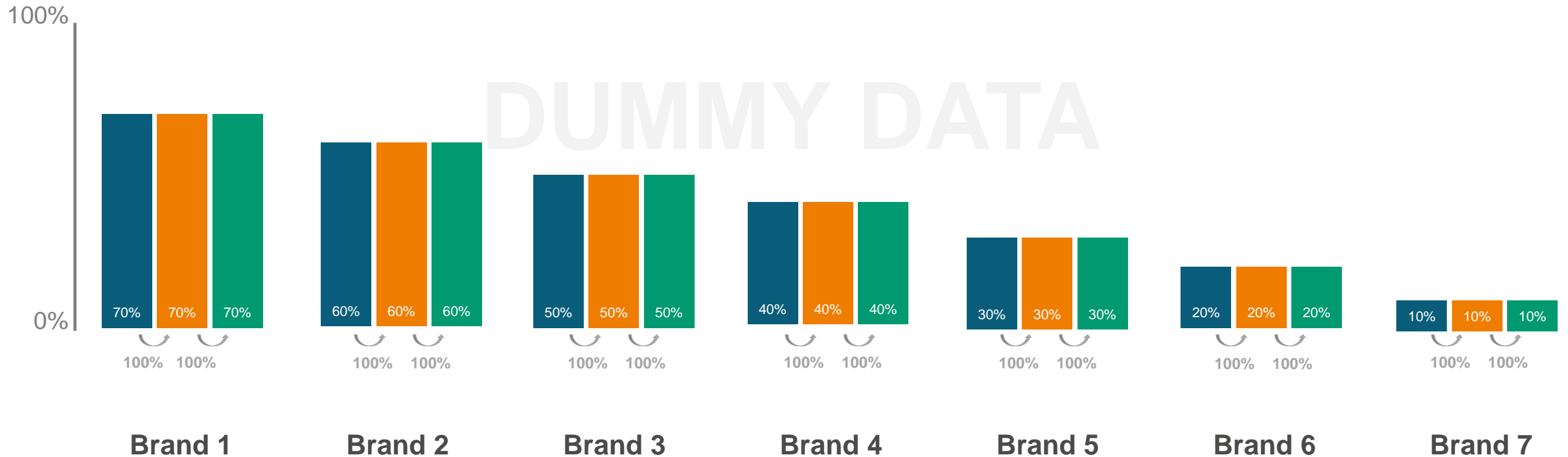
2. Brand usage

Which brands do you use on a regular basis?

3. Brand preference

Which brand do you prefer?

RESULTS FOR THE MOST MENTIONED BRANDS

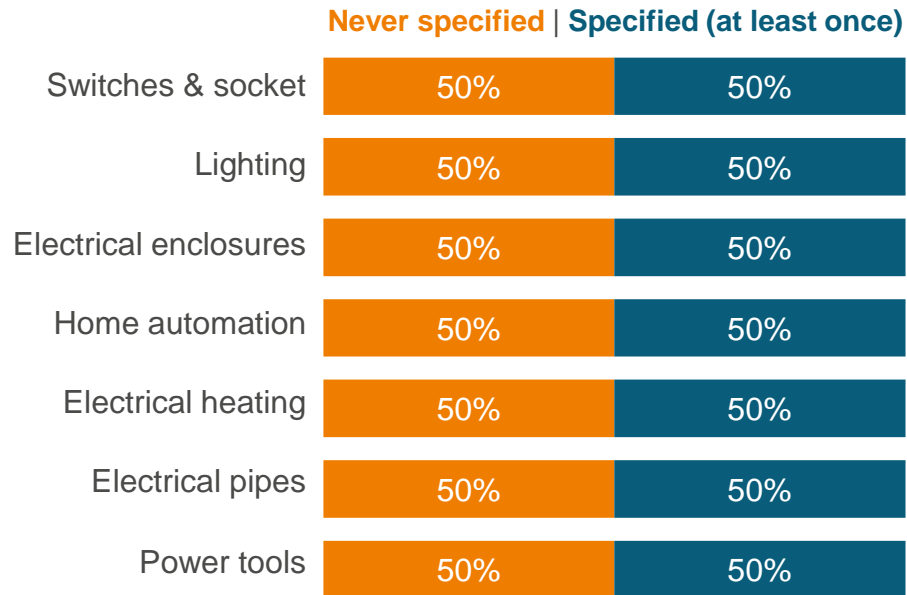


Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Brand specification

Q: In what share of your #product group# installations is there a brand specification?

Q: To what degree do you agree with the following statement? You can answer on a scale of 1 to 5, where 1 = Strongly disagree, ... 5 = Strongly agree.

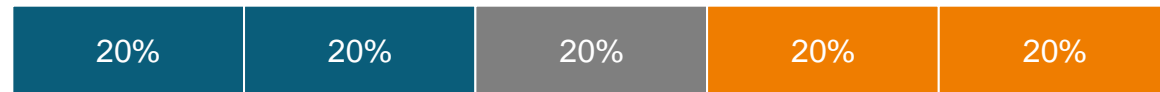


N= 125

STATEMENT:

'I install other brands than the ones I am used to only when I am forced by the specification.'

(Strongly) agree | **Neutral** | **Disagree (strongly)**

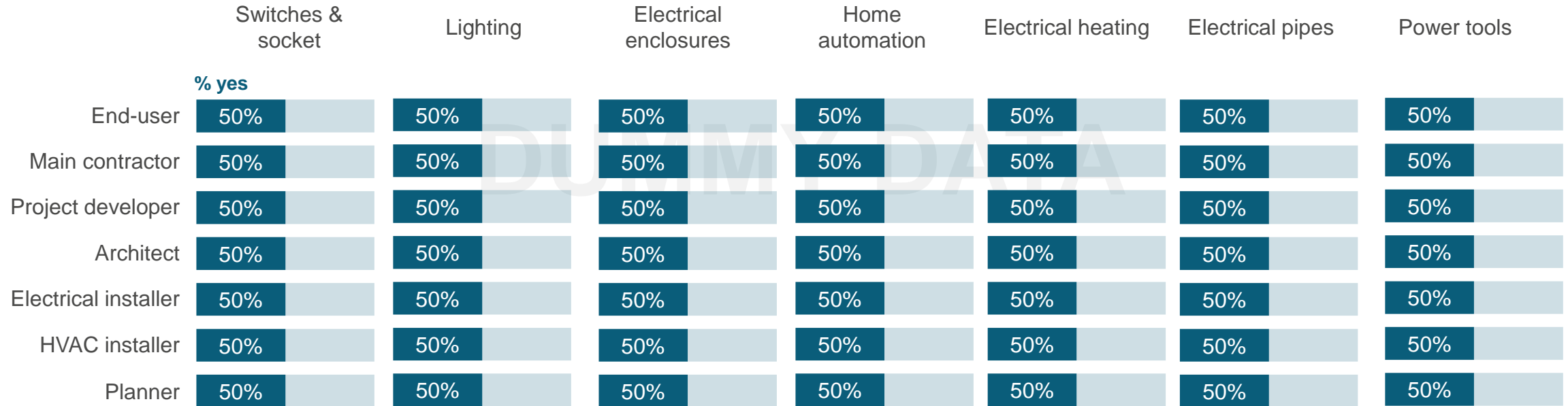


DUMMY DATA

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Key decision-makers

Q: If we talk about brand choice for electrical installation products, which stakeholder is the main decision-maker?

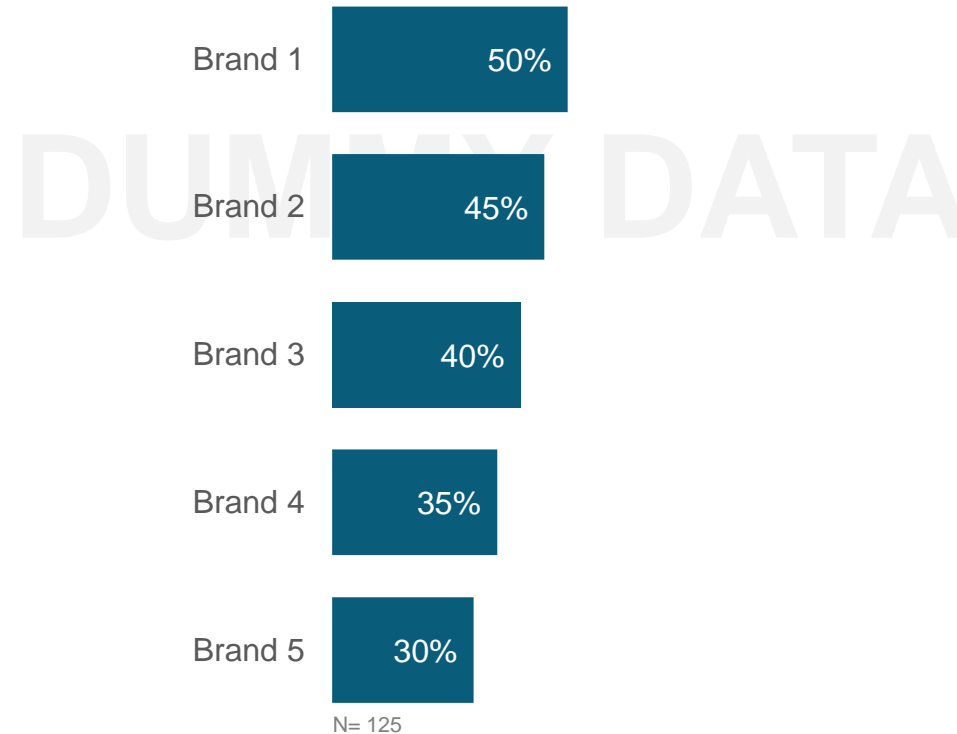


N= 125

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Leading brands in the UK

Q: In general, which brand(s) do you consider to be leaders in the electrical installation industry in #country#?



Index

About European Electrical Installation Monitor

Key takeaways

Profile of the electrical installer

Business development

Theme topic –Brand scan

United Kingdom

Germany

France

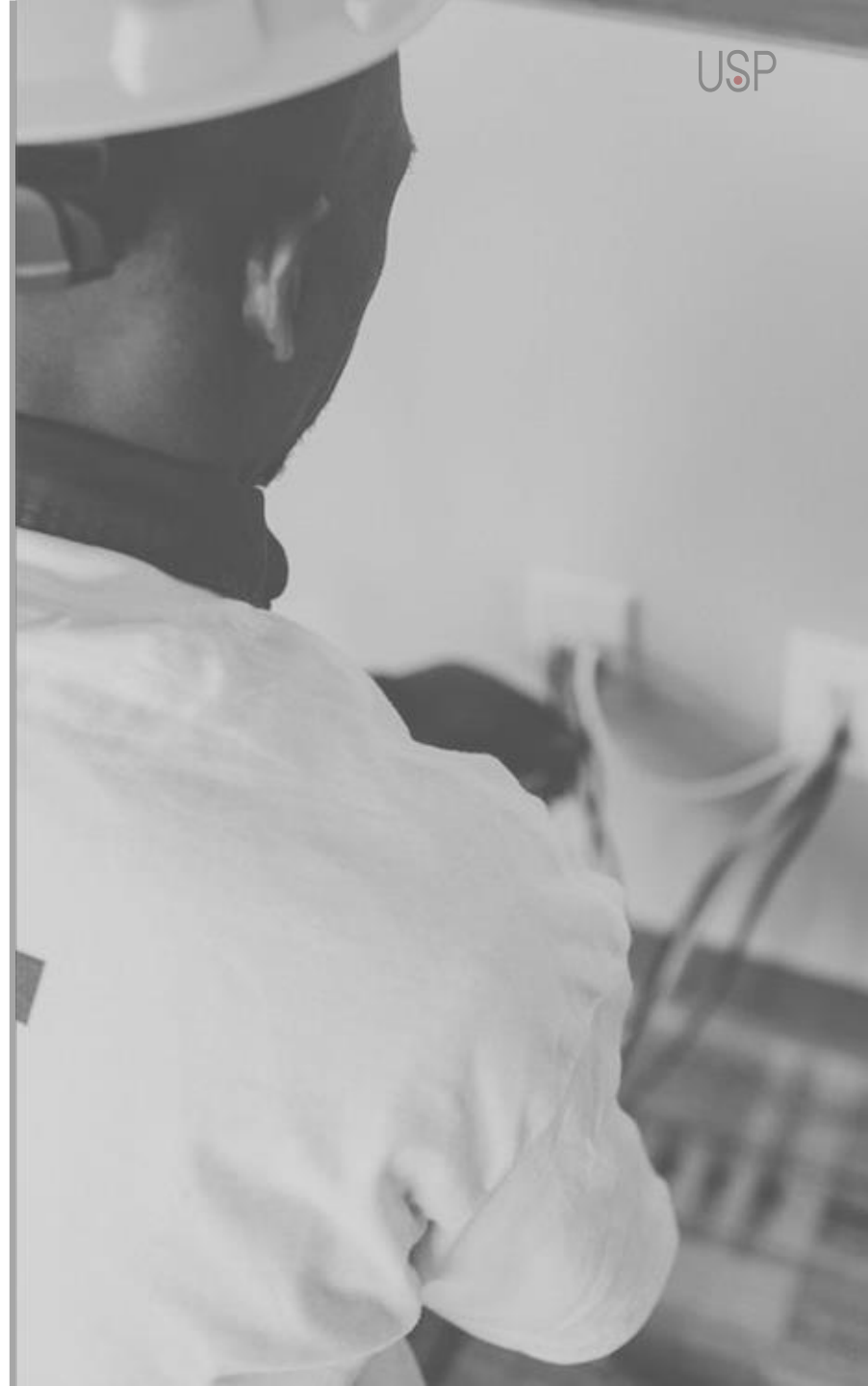
Poland

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**



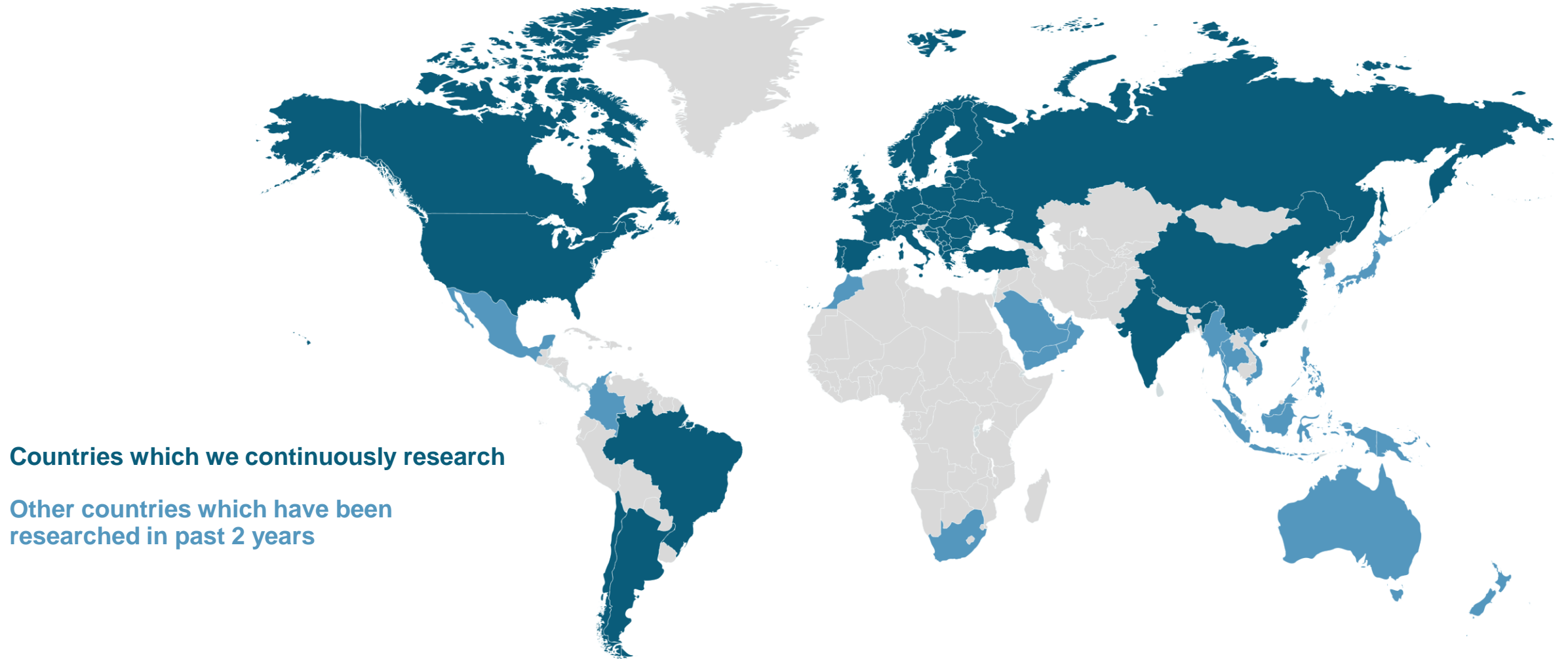
Dedicated market research

- 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
Target group	Architects	Building contractors	HVAC installers	Electrical installers	Professional painters	Consumers
Methodology						
Annual sample size	3,400 interviews	2,050 interviews	2,600 interviews	3,000 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 	<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
2022 Theme topics	<ul style="list-style-type: none"> • Q1: Sustainability • Q2: Trends in material usage • Q3: Decision making • Q4: Brand health scan 	<ul style="list-style-type: none"> • H1: Prefabrication • H2: Digitalisation and BIM 	<ul style="list-style-type: none"> • Q1: Digitalisation and BIM • Q2: Prefabrication • Q3: Smart buildings and products • Q4: Media orientation 	<ul style="list-style-type: none"> • Q1: Sustainability • Q2: Smart buildings and products • Q3: Services in the installation market • Q4: Brand health scan 	<ul style="list-style-type: none"> • Trend tracking • Sustainability • Labour shortage • Online buying • Media orientation 	<ul style="list-style-type: none"> • Q1: Orientation; rise of digital natives • Q2: Purchase Channels; online leaders • Q3: Brand health check • Q4: DIY vs DIFM; outsourcing jobs

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							
							
							

USP Marketing Consultancy

© 30 January 2023, USP Marketing Consultancy B.V.

The information in this publication is strictly confidential and all relevant copyrights, database rights and other (intellectual) property rights are explicitly reserved. No part of this publication may be reproduced and/or published without the prior written permission of USP Marketing Consultancy B.V.