European mechanical installation monitor Q1 2023

Sustainability

May 2023

A product by USP Marketing Consultancy

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About European Mechanical Installation Monitor

THE GOAL

To check and track the behaviour and trends in the European Mechanical installation market. This is done 4 times per year, by means of around 650 phone interviews (per quarter) with registered HVAC installation companies and plumbers, divided over 6 major European markets.

THE RESEARCH TOPICS

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

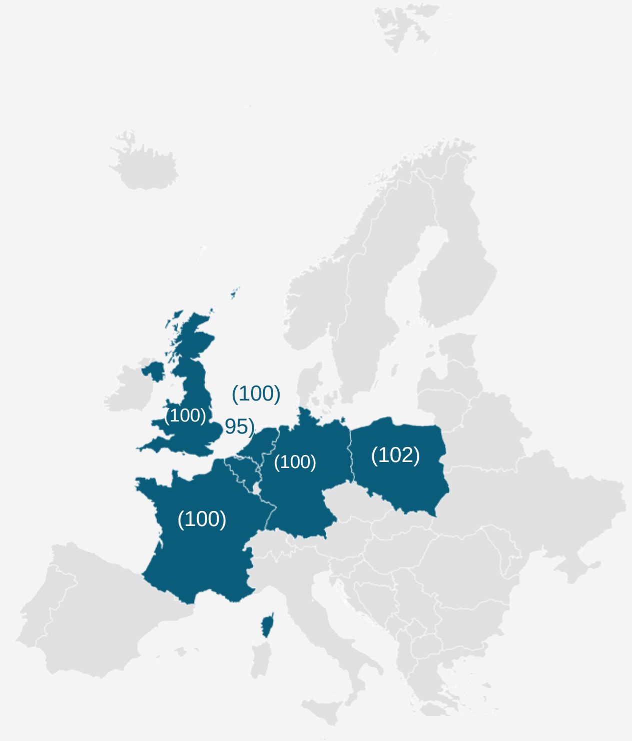
Quarterly theme topics in 2023:
Q1: Substainability
Q2: Services in the installation market
Q3: Purchase channels
Q4: Training needs

THE TIMELINE

Report Q1	Report Q2	Report Q3	Report Q4
May 2023	August 2023	November 2023	February 2024

COUNTRY SCOPE

Background characteristics of the interviewed respondents can be found in the appendix



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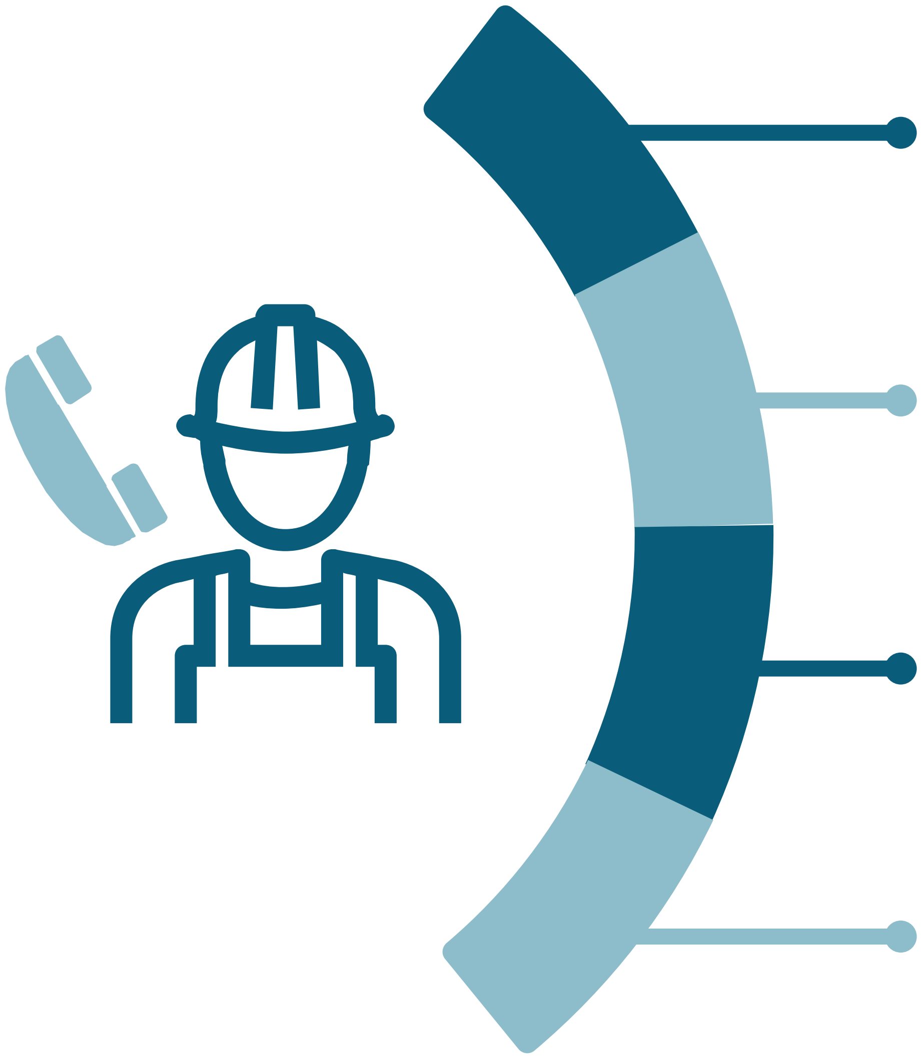
About target group & methodology



Surveying HVAC installation companies…

Interviewed companies need to provide HVAC installation services, but they may also do other activities in addition (Electrical installation 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 HVAC 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 number of interviews, in order to provide insights which can be relied on. These phone interviews are conducted 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 large companies to have an equal impact on the 'total' results. This way the results are not heavily influenced by many smaller companies.

* **Group 1**: 1-4 FTE; **Group 2**: 5-14 FTE; **Group 3**: 15+ FTE

About the Q1 theme topic

Surveying the Sustainability topic…

The construction sector is one of the most resource-consuming sectors. In the last decade, several initiatives have been made to encourage the construction industry to support the agenda of sustainable development. However, the pace of change in each country differs.

Installation systems can contribute enormously to constructing sustainable buildings and reducing CO2 emissions.

…allows for better understanding of installers' role and attitude towards sustainable solutions

This report aims to help manufacturers of plumbing and HVAC installation products understand installers' attitudes towards a sustainable construction and installation industry. This is essential for their designing of products and solutions, as well as to target the right stakeholders and encourage them to deliver a more sustainable building environment.

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

- Sustainability concept:
    - Installers' perception of sustainability/ sustainable solutions;
    - Contribution of various products/ solutions to creating sustainable buildings;
- Current status of sustainable projects;
- Motivations & barriers;
- Heat pumps.

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Key takeaways

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Business Development

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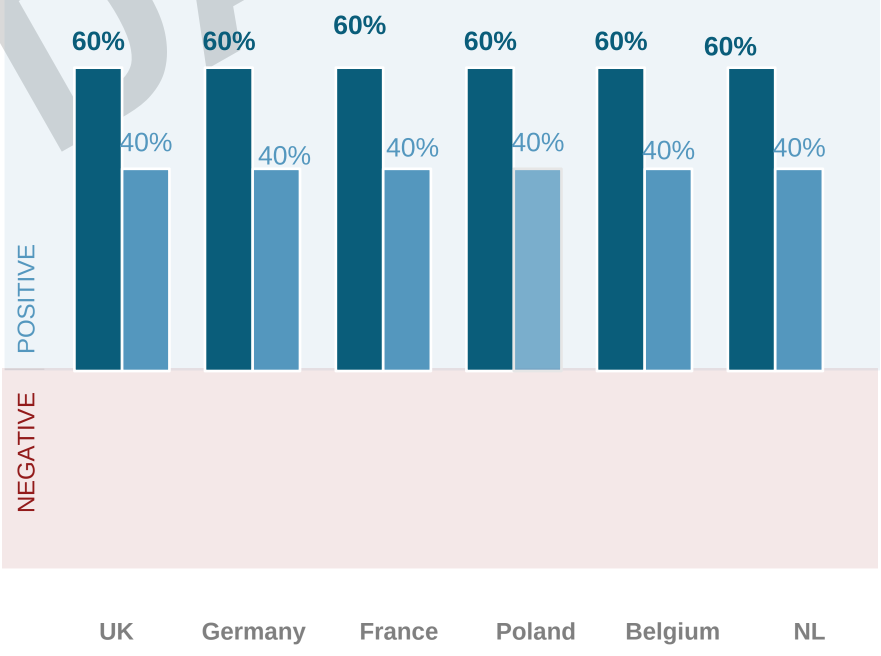
Turnover balance of installers Q1 2023 and Q2 2023

Balance of companies that **see**/**expect** an increase minus decrease in turnover in **Q1 2023**/**Q2 2023** in comparison to the turnover for **Q1 2022**/**Q2 2023**



Key takeaways

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Theme: Sustainability

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Share of projects where sustainability is taken into account (all projects)

Average Share of Projects						
2023	**40%**	**40%**	**40%**	**40%**	**40%**	**40%**
2021	**40%**	**40%**	**40%**	**40%**	**40%**	**40%**

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Core HVAC activities

Which of the following installation activities does your company perform?

	UK	Germany	France	Poland	Belgium	Netherlands
Sample size	*100*	*100*	*100*	*102*	*95*	*100*
Heating installations	40%	40%	40%	40%	40%	40%
Hot & cold water installation	40%	40%	40%	40%	40%	40%
Installation of sanitary ware	40%	40%	40%	40%	40%	40%
Ventilation	40%	40%	40%	40%	40%	40%
Air conditioning and cooling	40%	40%	40%	40%	40%	40%
Heat pumps	40%	40%	40%	40%	40%	40%

Other installation activities

	UK	Germany	France	Poland	Belgium	Netherlands
Sample size	*100*	*100*	*100*	*102*	*95*	*100*
Solar cells, solar collectors	40%	40%	40%	40%	40%	40%
Electrical installation	40%	40%	40%	40%	40%	40%
Home automation installation	40%	40%	40%	40%	40%	40%

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Core HVAC activities		By company size: 1-4 FTE	5-14 FTE	15+ FTE
Heating installations	40%	40%	40%	40%
Installation of sanitary ware	40%	40%	40%	40%
Hot & cold water installation	40%	40%	40%	40%
Ventilation	40%	40%	40%	40%
		40%	40%	40%

Other activities		By company size: 1-4 FTE	5-14 FTE	15+ FTE
Electrical installation	40%	40%	40%	40%
Home automation installation	40%	40%	40%	40%
Solar cell, solar collectors installation	40%	40%	40%	40%

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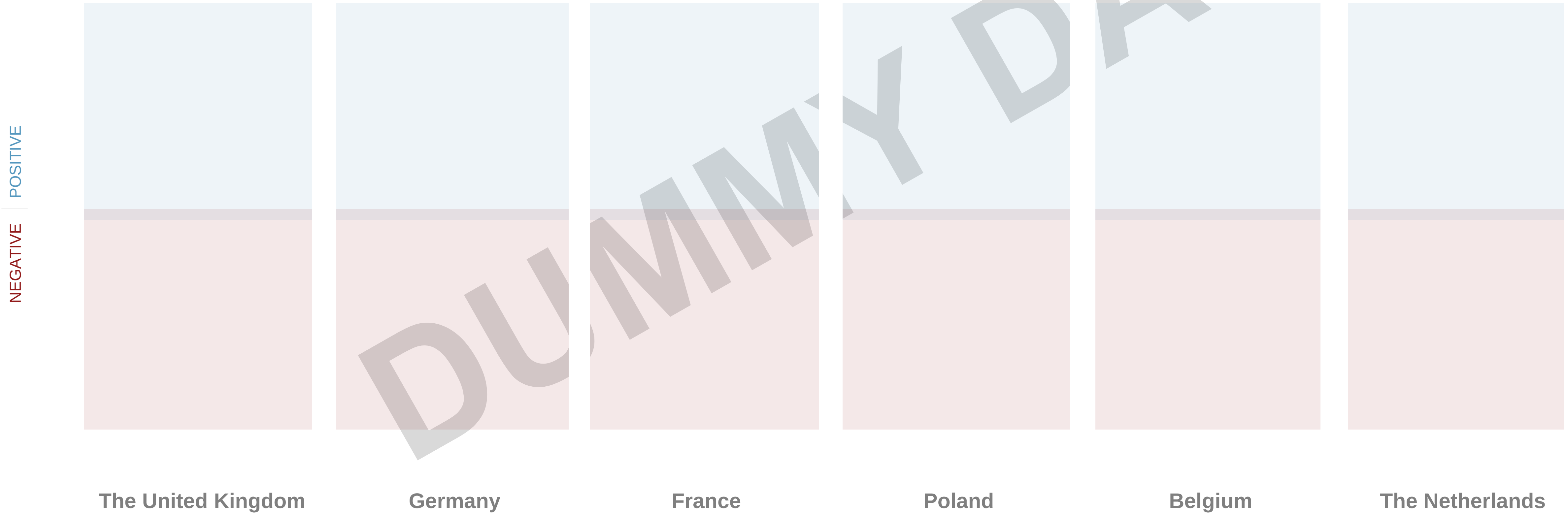
Turnover outlook last quarters and expectations for Q1 2023

TURNOVER BALANCE

(% INCREASE minus % DECREASE)

COMPARISON SAME QUARTER LAST YEAR



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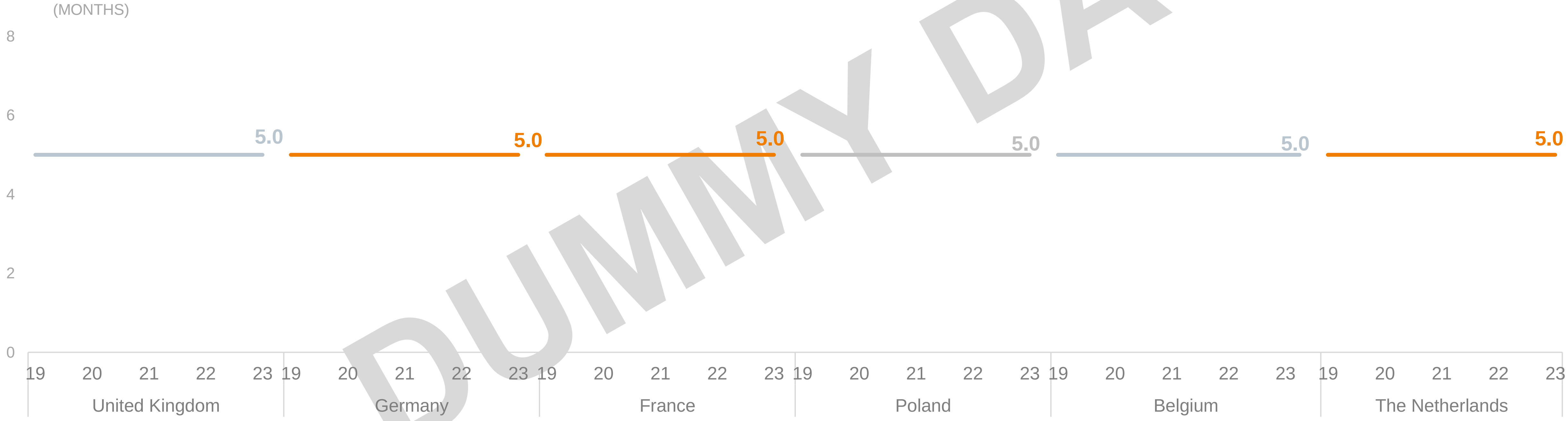
Order book portfolio

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



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Turnover outlook

If you compare your turnover of Q1-23 to Q1-22, how did your turnover develop? What are your expectations for the development in Q2-23?

TURNOVER BALANCE (% INCREASE minus % DECREASE)

COMPARISON SAME QUARTER LAST YEAR

Order book portfolio

How big is your current order book portfolio?

ORDER BOOK (MONTHS)

EU | THE UNITED KINGDOM

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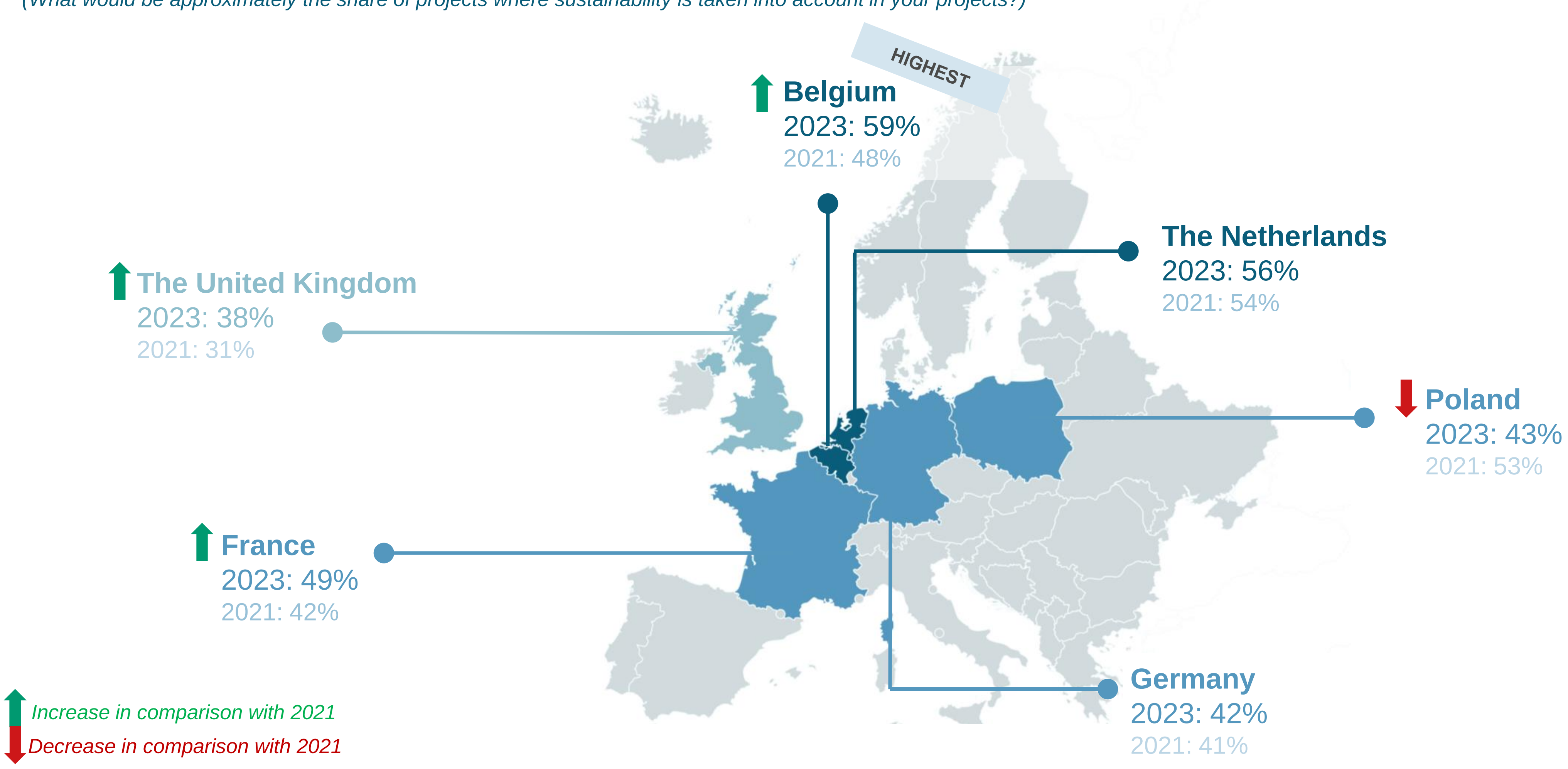
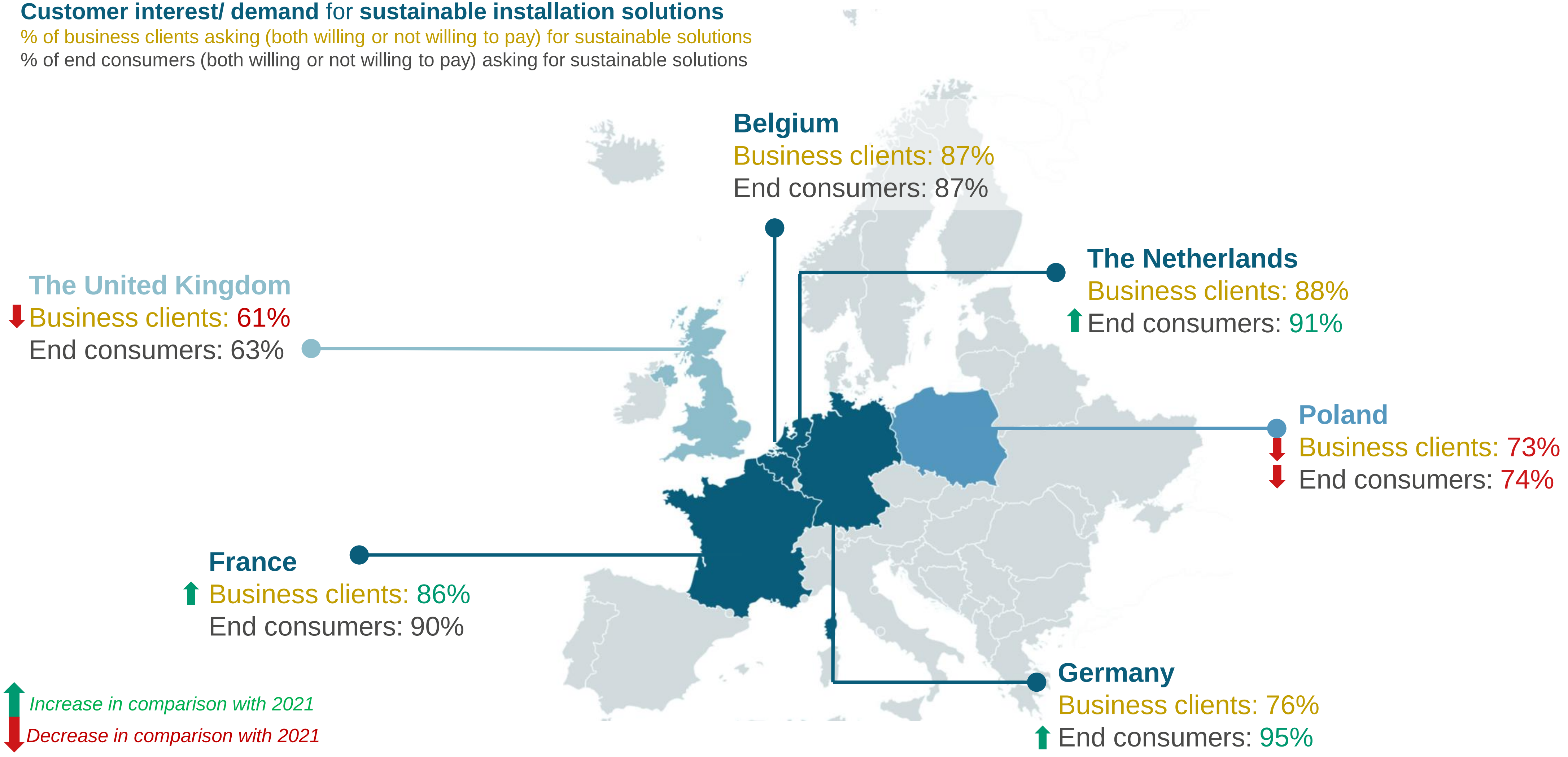
Compared to 2021, Belgium experienced the highest increase in installation projects incorporating sustainability. In contrast, Poland experienced a decline of projects with such installations

Average % of projects where **sustainability is considered**
(What would be approximately the share of projects where sustainability is taken into account in your projects?)



The greatest interest in sustainable solutions is observed among German and Dutch end consumers. Customers in the UK have the least interest in sustainable solutions. In Poland, there has been a decline in the demand for sustainable solutions among both business clients and end consumers when compared to 2021

Customer interest/ demand for **sustainable installation solutions**
% of business clients asking (both willing or not willing to pay) for sustainable solutions
% of end consumers (both willing or not willing to pay) asking for sustainable solutions



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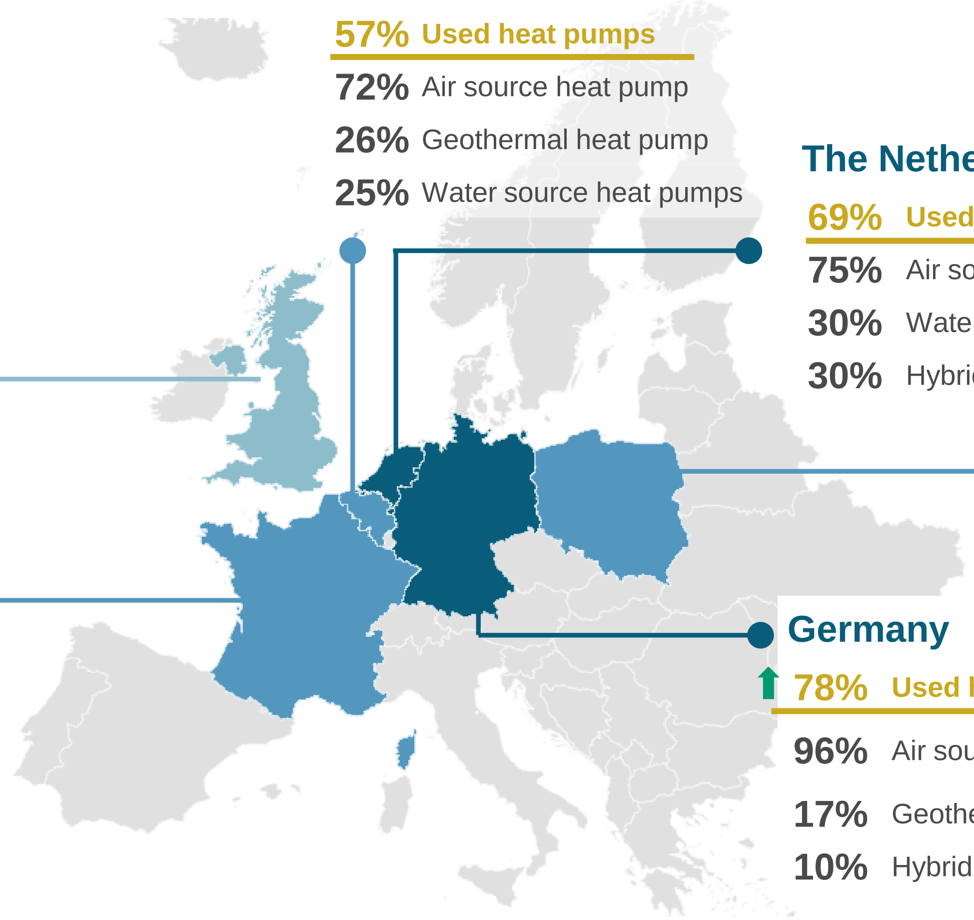
Heat pumps are the most used product in every country, with air source heat pumps being installed most often.

Which installation products are mainly being used in your projects when sustainable solutions are requested?

% Used **heat pumps** in projects when sustainable solution are requested

% Top 3 of most used heat pumps



Belgium

57% Used heat pumps

- **72%** Air source heat pump
- **26%** Geothermal heat pump
- **25%** Water source heat pumps

The Netherlands

69% Used heat pumps

- **75%** Air source heat pump
- **30%** Water source heat pumps
- **30%** Hybrid heat pumps

The United Kingdom

⬇ **32% Used heat pumps**

- **95%** Air source heat pump
- **15%** Geothermal heat pump
- **9%** Exhaust air heat pump

Poland

⬇ **48% Used heat pumps**

- **86%** Air source heat pump
- **17%** Water source heat pumps
- **11%** Geothermal heat pump

France

⬆ **59% Used heat pumps**

- **93%** Air source heat pump
- **25%** Exhaust air heat pump
- **23%** Hybrid heat pump

Germany

⬆ **78% Used heat pumps**

- **96%** Air source heat pump
- **17%** Geothermal heat pump
- **10%** Hybrid heat pump

⬆ *Increase in comparison with 2021*

⬇ *Decrease in comparison with 2021*

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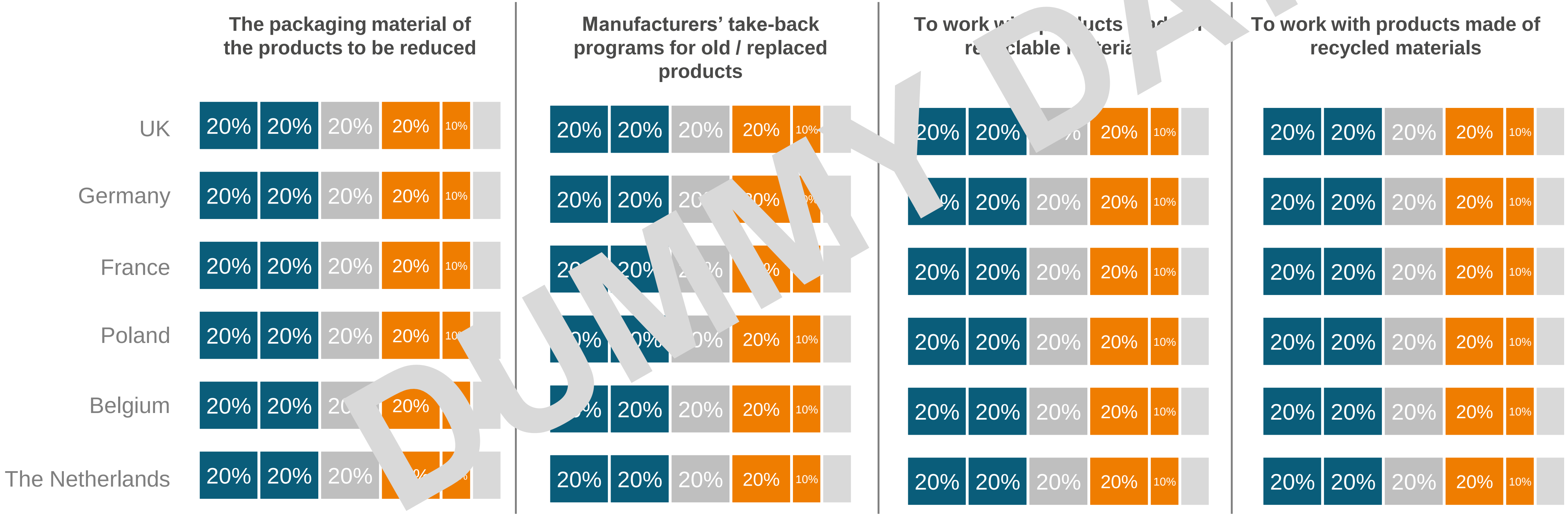
Importance of sustainability-related practices

(To what extent is each of the following things important to you?)

(Very+rather) important | Neutral | **Rather unimportant+ Not important at all** | Don't know



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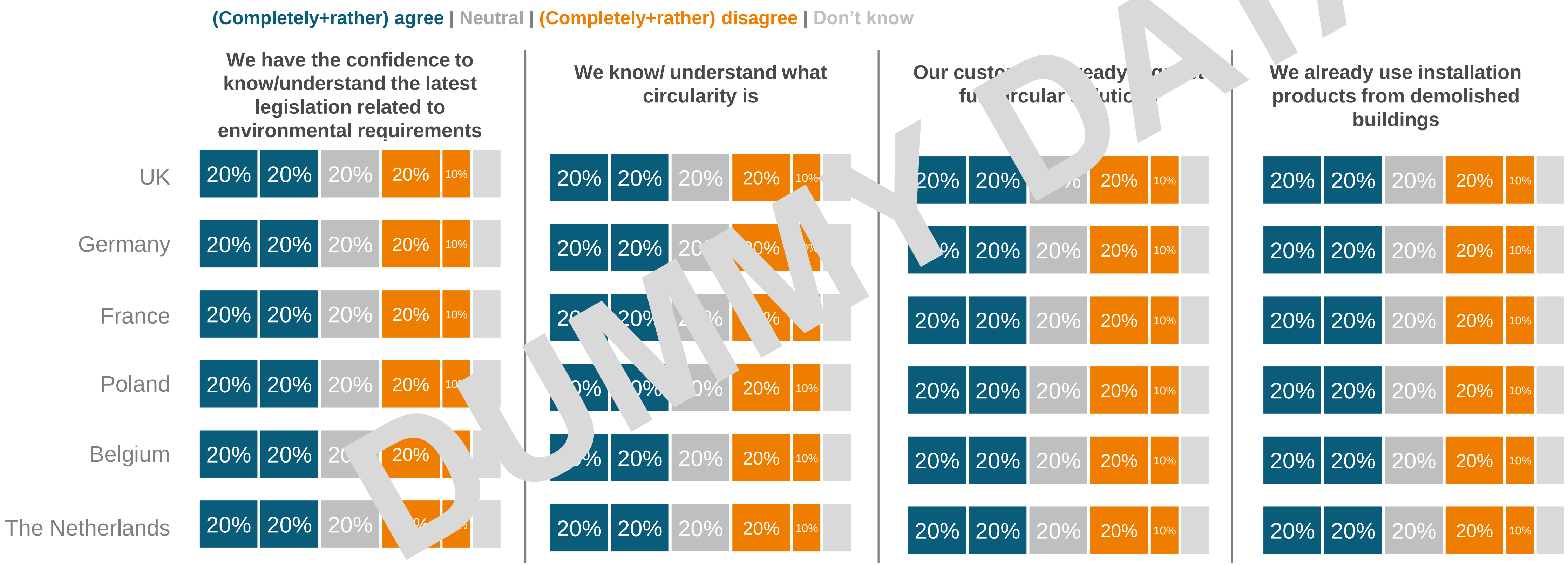
Environmental expertise and circular solutions practices

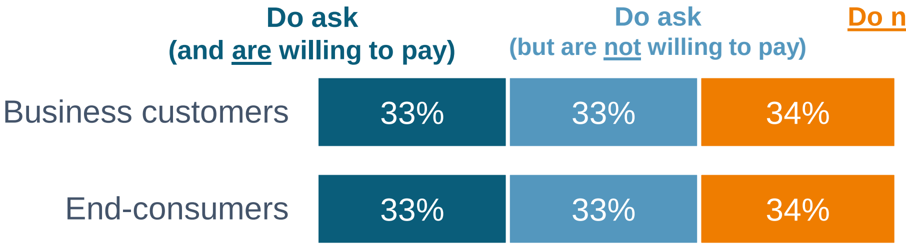
(To what extent do you agree with the following statements?)



Key European insights (average of all countries)

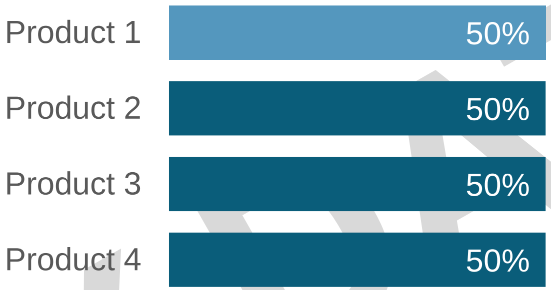
About **30% of the European installation projects** take sustainability into account

Customer interest/ demand for sustainable installation solutions

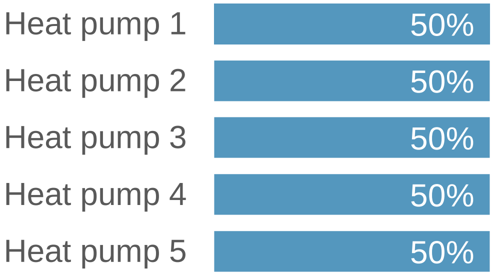


Top 2 Most asked-for sustainable products and solutions by business customers and end-consumers (combined results)

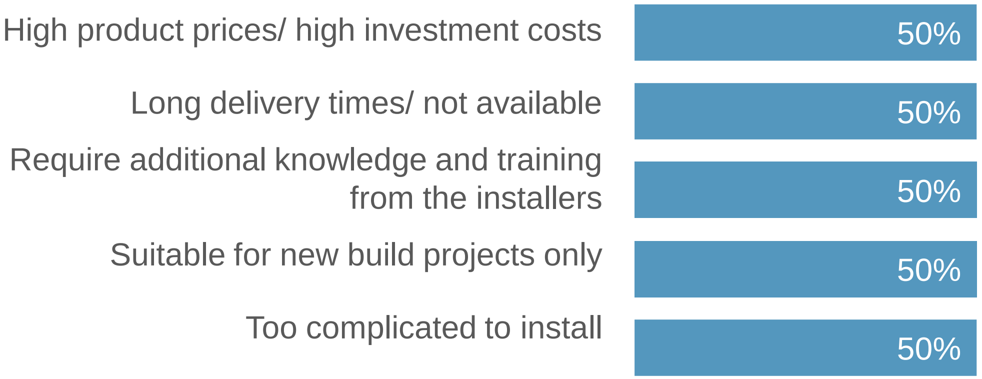
Most used installation products in sustainable solutions



Most used heat pumps



Challenges in offering/ working with heat pumps



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Main characteristics of a sustainable solution – Top 10

What are according to you the main characteristics of a sustainable solution?

		1-4 FTE	5-14 FTE	15+ FTE
Energy efficiency	30%	30%	30%	30%
Has a green label	30%	30%	30%	30%
Low maintenance cost	30%	30%	30%	30%
Produced from recycled or sustainable materials	30%	30%	30%	30%
Products and materials with long life span	30%	30%	30%	30%
Saves money	30%	30%	30%	30%
Tecnologically advanced products	30%	30%	30%	30%
To be reusable	30%	30%	30%	30%
Using renewable energy	30%	30%	30%	30%
With low carbon footprint	30%	30%	30%	30%

30% of the interviewed installers do not know what would be the main characteristics of a sustainable solution

Base: n=100, all installers

Clients' consideration of a sustainable solution – Top 9

When your clients talk about sustainable solutions, what do they normally mean or search for?

		1-4 FTE	5-14 FTE	15+ FTE
Energy efficiency	30%	30%	30%	30%
Hydrogen	30%	30%	30%	30%
Low installation cost	30%	30%	30%	30%
Low maintenance cost	30%	30%	30%	30%
Low running cost	30%	30%	30%	30%
Products and materials with long life span	30%	30%	30%	30%
Saves money	30%	30%	30%	30%
Using renewable energy	30%	30%	30%	30%
With low carbon footprint	30%	30%	30%	30%

Base: n=100, all installers

30% of the interviewed installers state their clients are not asking for sustainable solution(s), and an additional 14% do not know/have no opinion on sustainable solutions their clients normally search for

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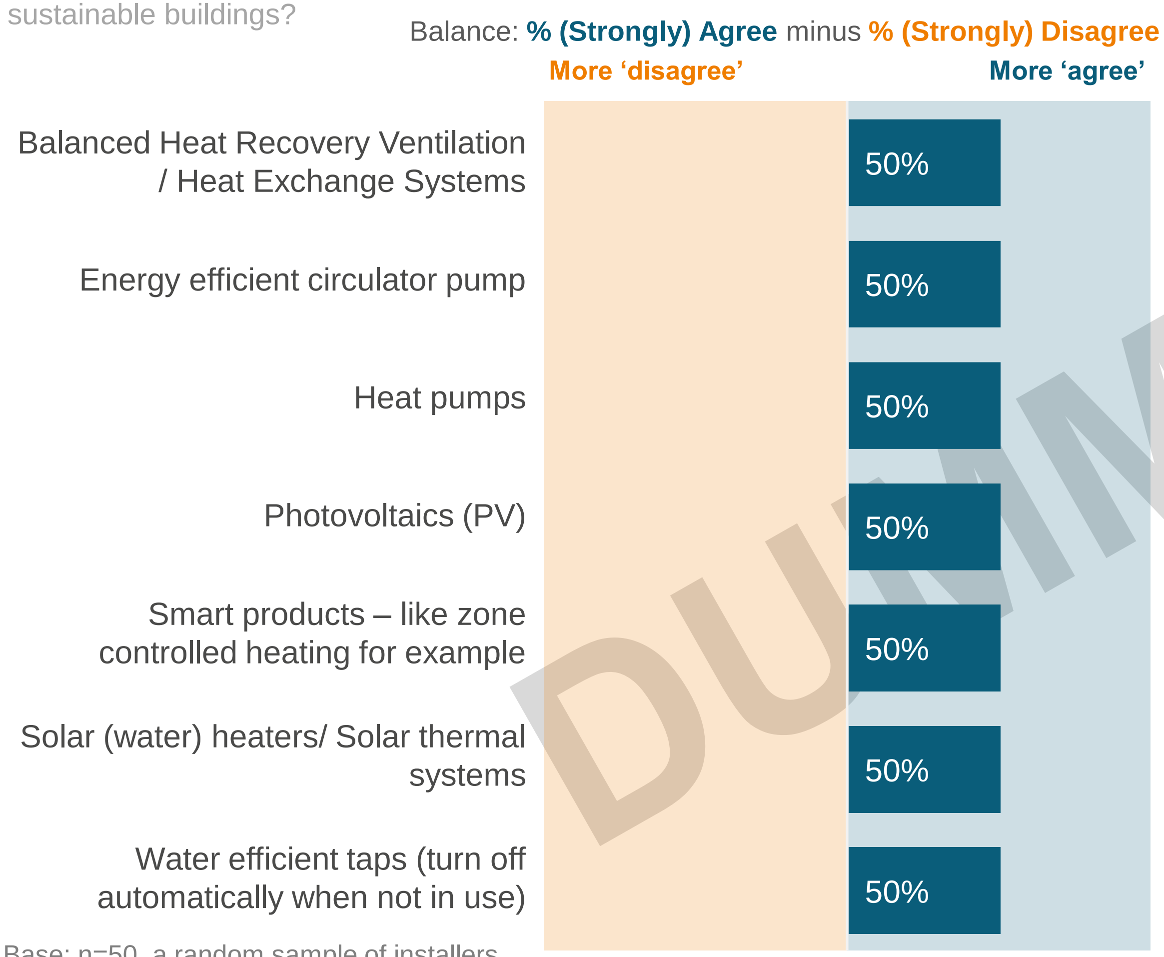
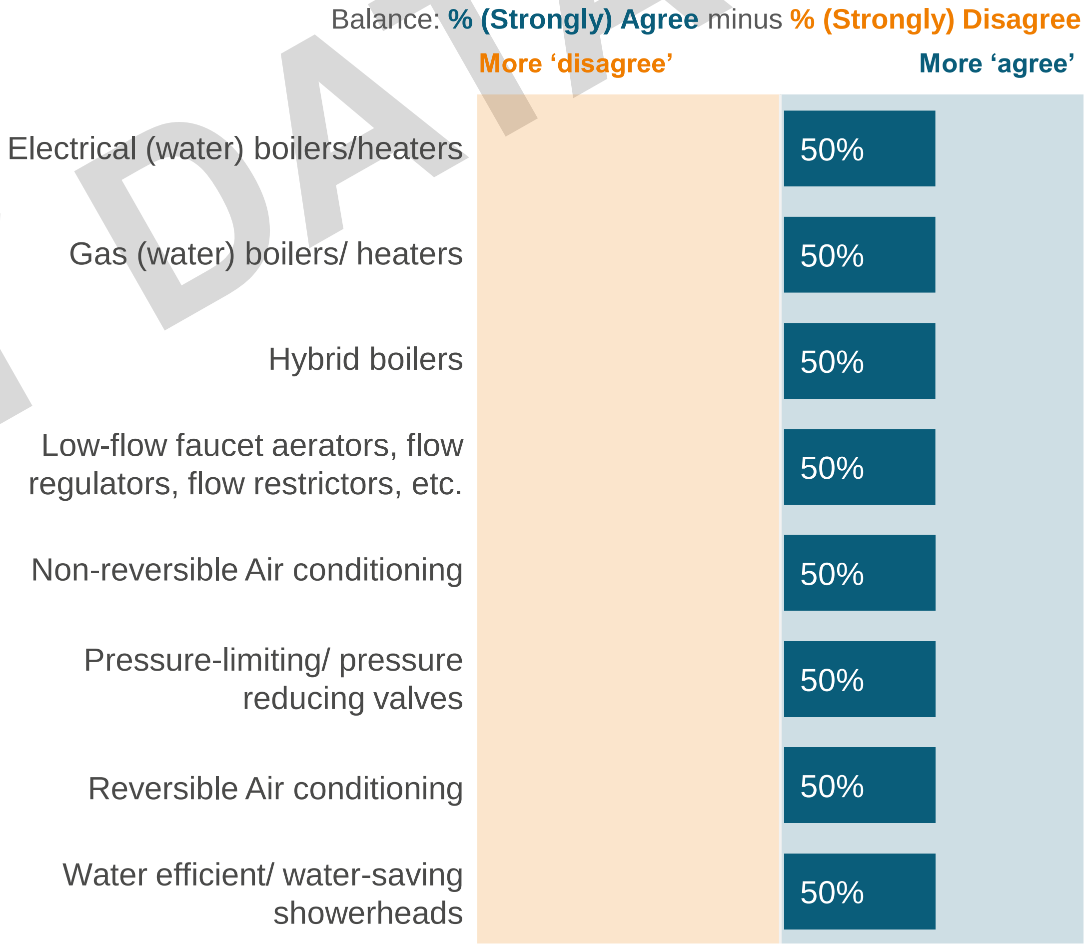
Installation products for sustainable buildings

To what extent do you agree that the following installation products can be used for creating sustainable buildings?





Base: n=50, a random sample of installers

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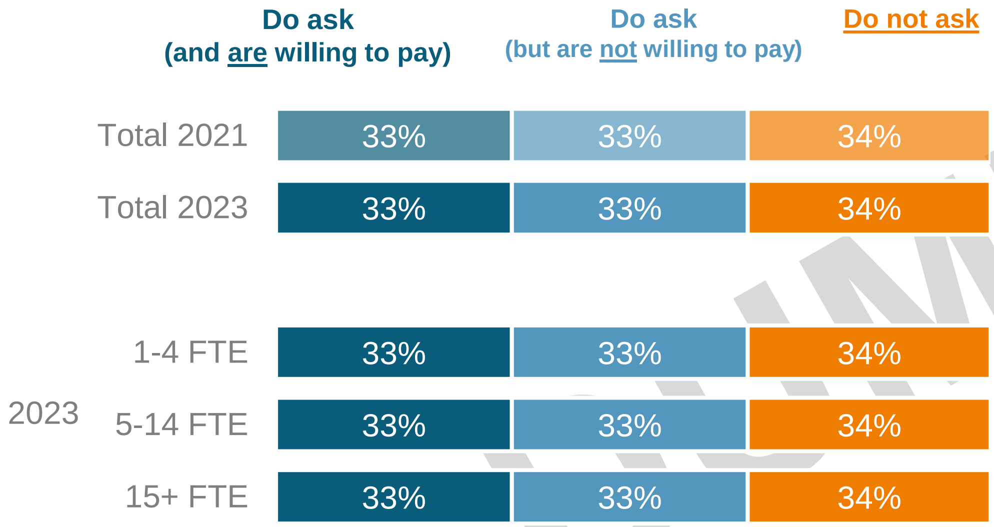
Customer interest/ demand for sustainable installation solutions

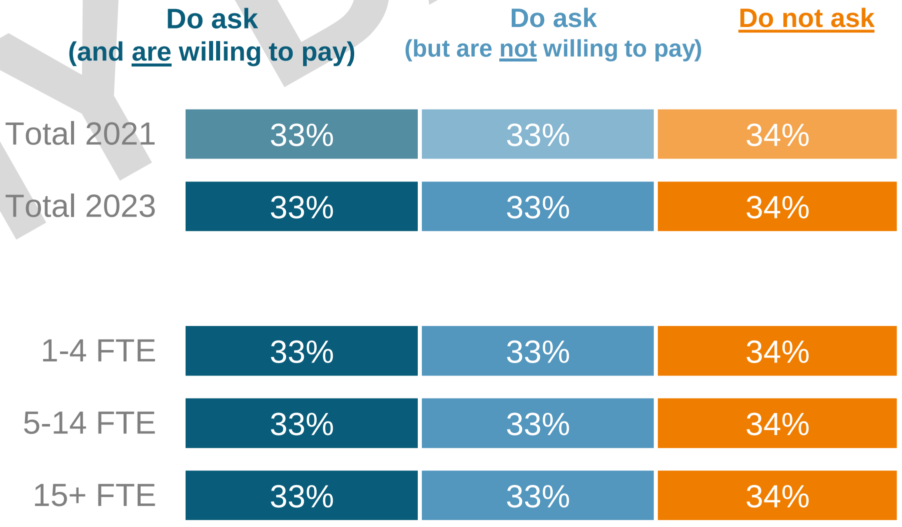
If we divide your clients in two main types: business clients and end consumers. To what extent do those two types of customers ask for sustainable installation solutions?

Business customers

(contractors, architects, office/ commercial building owners etc)



End consumers/ homeowners



Base: n=92, all installers *(valid sample, "Don't know" excluded from the analysis*)

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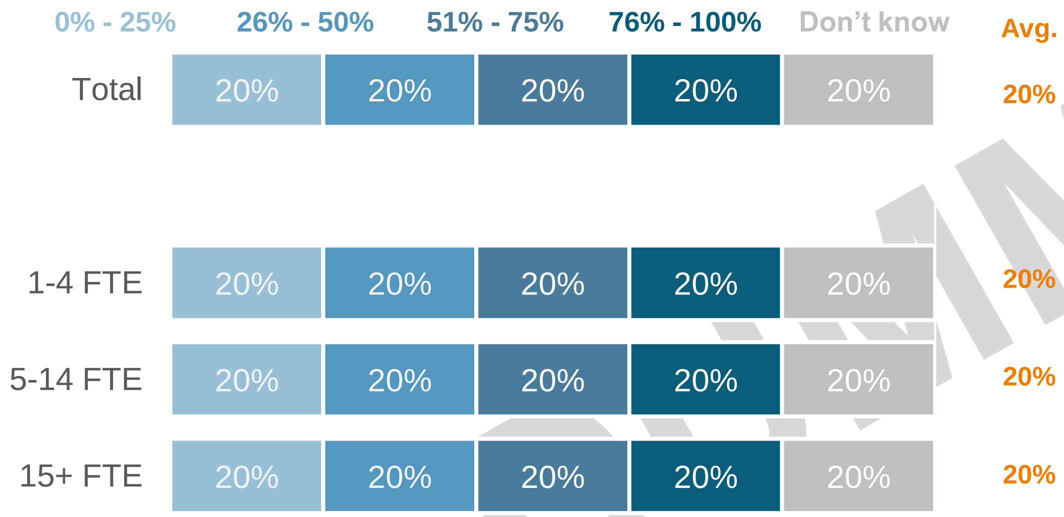
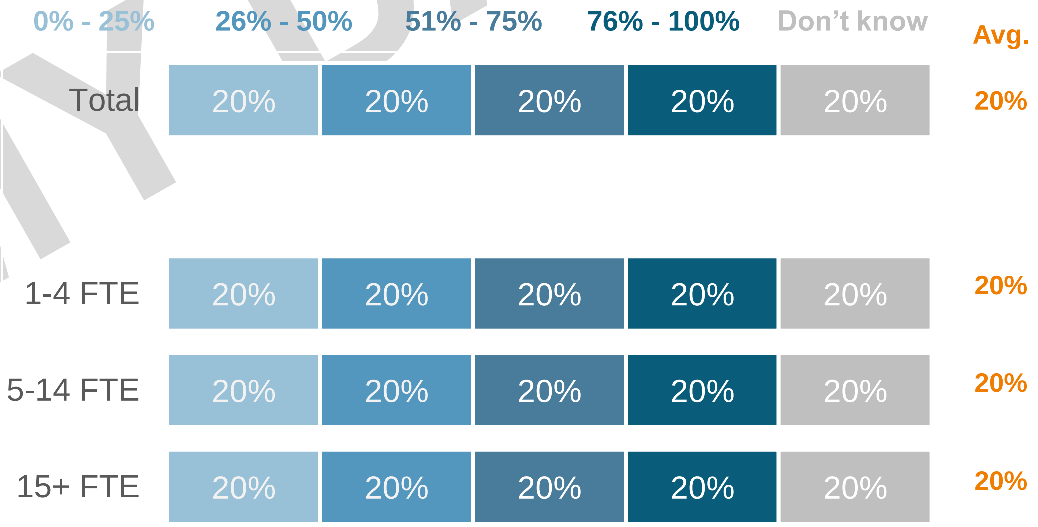
Sustainability Projects

What would be approximately the share of your projects where sustainability is taken into account or asked for?

Share of sustainability projects 2023



Share of sustainability projects 2021



Base: n=100, all installers

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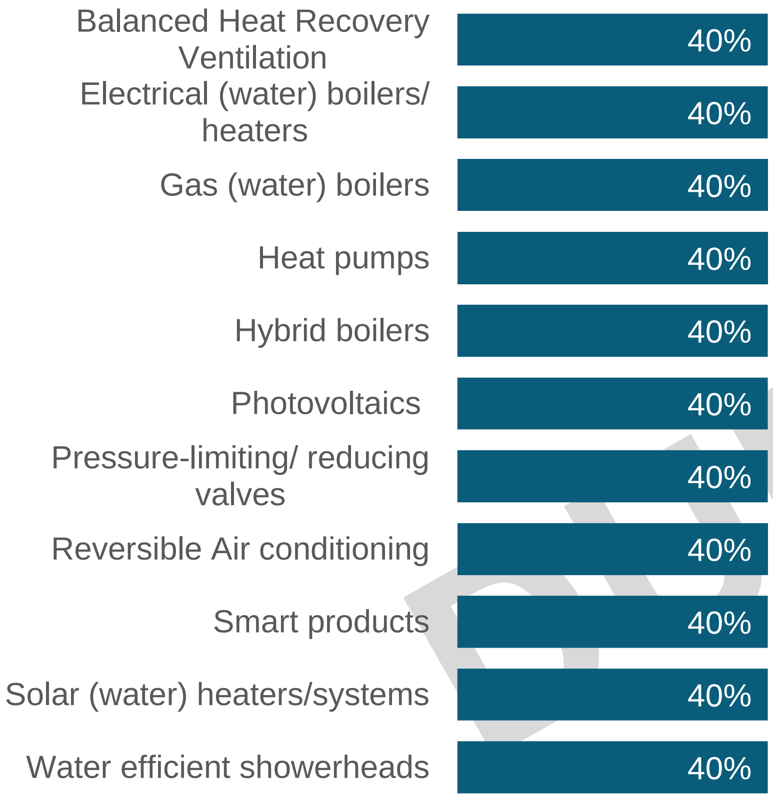
Most asked-for sustainable products and solutions by business customers – Top 10

What sustainable products and solutions are business customers mostly asking for?

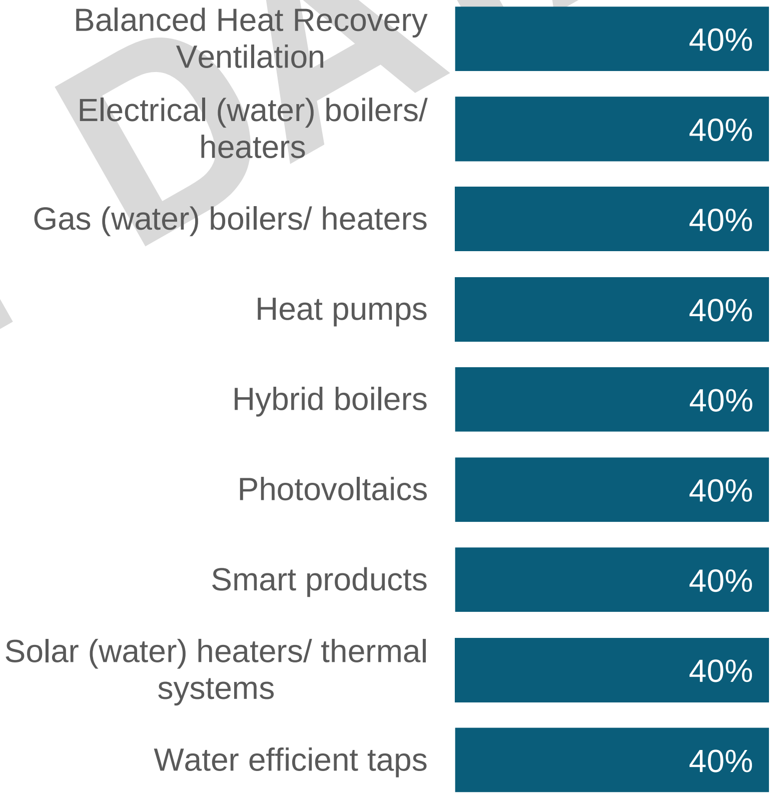


30% of the interviewed installers do not know what sustainable products and solutions business customers mostly ask for

Base: n=60, installers asked by business customers for sustainable solutions

Most asked-for sustainable products and solutions by end – consumers – Top 9

What sustainable products and solutions are end-consumers mostly asking for?



30% of the interviewed installers do not know what sustainable products and solutions end-consumers mostly ask for

Base: n=70, installers asked by end-consumers for sustainable solutions

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Most used installation products in sustainable solutions – Top 10

Which installation products are mainly being used/chosen in your projects when sustainable solutions are requested?

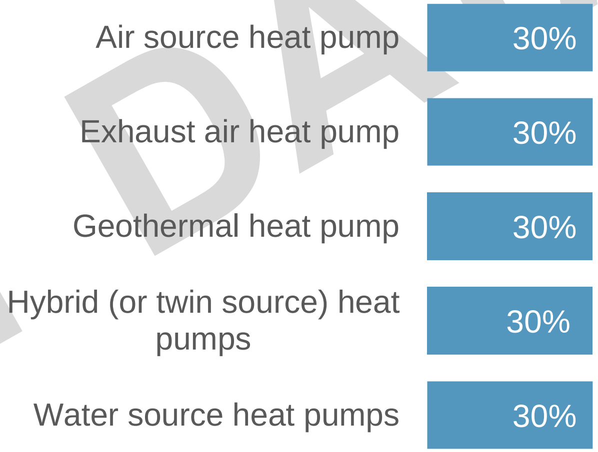
		1-4 FTE	5-14 FTE	15+ FTE
Electrical (water) boilers/heaters	30%	30%	30%	30%
Gas (water) boilers/ heaters	30%	30%	30%	30%
Heat pumps	30%	30%	30%	30%
Heat Recovery Ventilation	30%	30%	30%	30%
Hybrid boilers	30%	30%	30%	30%
Low-flow faucet aerators, regulators, etc.	30%	30%	30%	30%
Photovoltaics	30%	30%	30%	30%
Reversible Air conditioning	30%	30%	30%	30%
Smart products	30%	30%	30%	30%
Solar (water) heaters/ thermal systems	30%	30%	30%	30%

Base: n=100, all installers

30% of the interviewed installers do not know which installation products are being mainly chosen for their sustainable solutions' projects

Most used heat pumps*

Which type of heat pumps is the most used one? *(up to 2 answers)*



Base: n=25, installers installing heat pumps; * Results are indicative due to low number of observations (n<30)

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Challenges in offering/ working with heat pumps – Top 10

What are the main challenges/ barriers for you as an installer with regard to offering and working with heat pumps?

	Total	1-4 FTE	5-14 FTE	15+ FTE
High product prices/ investment costs	30%	30%	30%	30%
Too complicated to install	30%	30%	30%	30%
Require additional knowledge and training from the installers	30%	30%	30%	30%
Long delivery times/ not available	30%	30%	30%	30%
Create too much trouble when installed	30%	30%	30%	30%
Suitable for new build projects only	30%	30%	30%	30%
Unclear benefits for the end user	30%	30%	30%	30%
Difficult to use/ too complex for the end user	30%	30%	30%	30%
Regulations and paperwork	30%	30%	30%	30%
No market demand/customers not interested	30%	30%	30%	30%

Base: n=100, all installers

30% of the interviewed installers do not know/have no opinion on barriers regarding the offering and working with heat pumps

Sought sustainability features in tools the installers use – Top 5

Do you look for certain features in the tools you use that are related to sustainability?

Battery type	30%
Can be repaired/have replaceable parts	30%
Clean usage	30%
Longer life time	30%
Made of recycled materials	30%

30% **do not know** (38%) or **do not look** (31%) for sustainability-related features in the tools they use

Base: n=100, all installers

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Importance of sustainability-related practices

To what extent is each of the following things important to you?

(Very+rather) important | Neutral | **Rather unimportant+ Not important at all** | Don’t know

(Very+rather) important

							1-4 FTE	5-14 FTE	15+ FTE
Manufacturers’ **take-back programs** for old / replaced products	20%	20%	20%	20%	10%	10%	30%	30%	30%
The **packaging material** of the products to be **reduced**	20%	20%	20%	20%	10%	10%	30%	30%	30%
To work with products made of **recyclable materials**	20%	20%	20%	20%	10%	10%	30%	30%	30%
To work with products made of **recycled materials**	20%	20%	20%	20%	10%	10%	30%	30%	30%

Base: n=100, all installers

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Environmental expertise and circular solutions practices

To what extent do you agree with the following statements?

(Completely+rather) agree | Neutral | **(Completely+rather) disagree** | Don't know

Statement	(Completely+rather) agree		Neutral	(Completely+rather) disagree		Don't know	1-4 FTE	5-14 FTE	15+ FTE
							(Completely+rather) agree		
Our **customers** already **request full circular solutions**	20%	20%	20%	20%	10%	10%	30%	30%	30%
We already **use installation products from demolished buildings**	20%	20%	20%	20%	10%	10%	30%	30%	30%
We have the confidence to know/**understand the latest legislation related to environmental requirements**	20%	20%	20%	20%	10%	10%	30%	30%	30%
We know/ **understand what circularity is**	20%	20%	20%	20%	10%	10%	30%	30%	30%

Considering using products coming from demolished buildings

Would you consider using installation products coming from demolished buildings, <u>if price & quality is similar to the new products</u>? (certainly yes + rather yes)

30% Would **consider** installation **products** coming **from demolished buildings if price & quality is similar to new products**

Base: n=100, all installers

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
Owner / Director/ Manager	94%	52%	72%	91%	73%	70%
Plumber/ installer		19%	4%	4%	4%	5%
Buyer/purchaser	2%	11%	1%	1%	1%	4%
Senior buyer/ purchaser	1%	5%	1%		3%	0%
Engineer/designer		4%	3%	3%	2%	2%
Calculator	1%	2%	5%		2%	2%
Project manager	2%	7%	14%		9%	
Other				1%	5%	7%
1 - 4 FTE	51%	31%	50%	32%	55%	39%
5 - 14 FTE	29%	42%	37%	40%	20%	33%
15+ FTE	20%	27%	13%	27%	25%	28%

About USP

USP Marketing Consultancy

Head office — Rotterdam

Subsidiaries — Düsseldorf, Zagreb

Total **70**

Research Analysts · Project managers · Consultants

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

80% turnover coming from **international projects**

85% turnover coming from **dedicated market research**, 15% from multi client

70% turnover coming from **B2B**, 30% B2C

Research in **31** countries in 2022

43 focus groups

1,778 in-depth interviews

63,758 B2B CATI interviews

54,850 B2C online interviews

Single client research

Examples

Segmentation

Customer journey

Branding

Concept/ product research

Customer satisfaction

Trends

Distribution research

Market exploration

Pricing

Market size

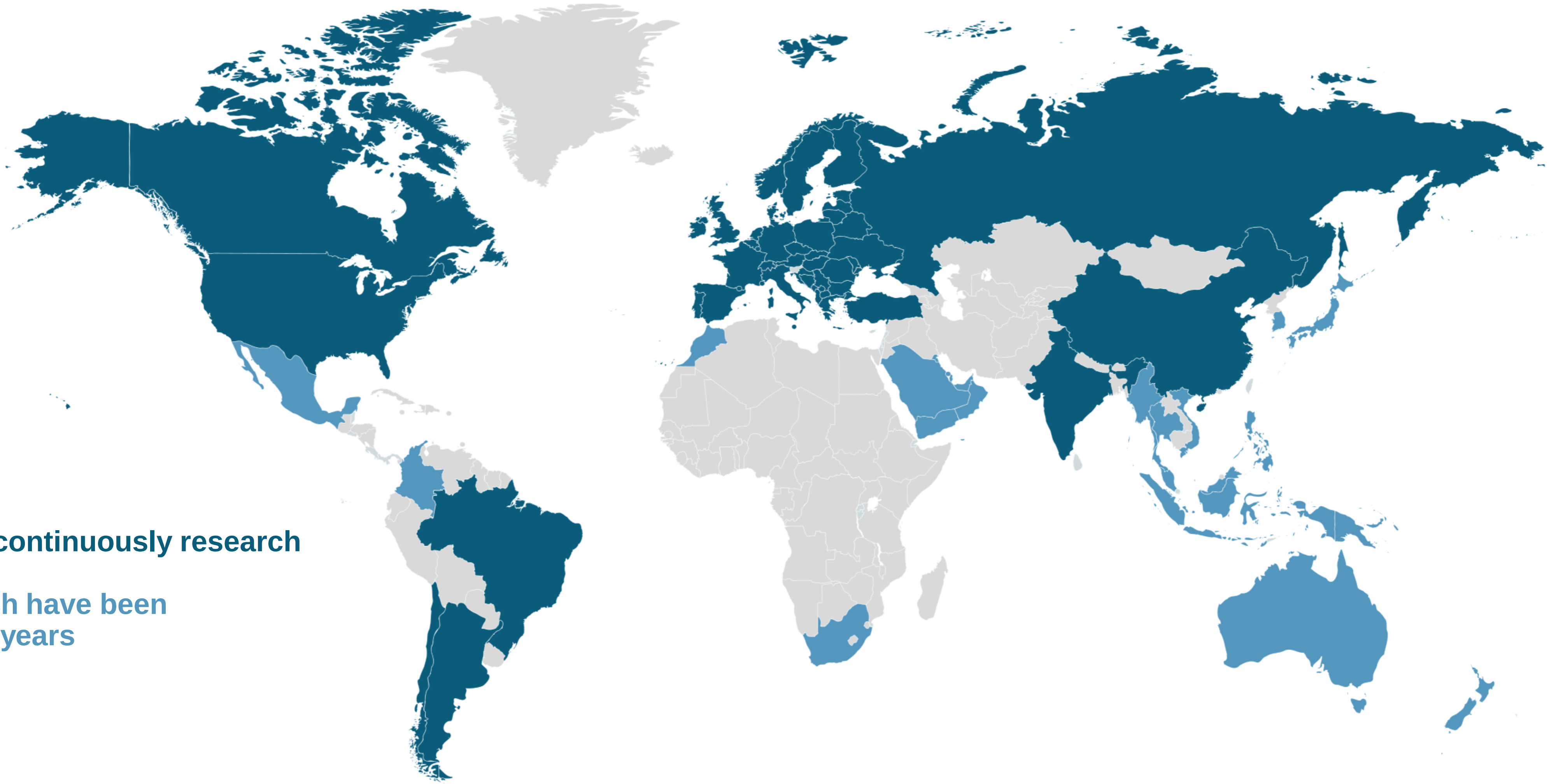
Dedicated market research

- 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 quantitive 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.

multi-client research

	European **Architectural** Barometer	European **Contractor** Monitor	European **Mechanical Installation** Monitor	European **Electrical Installation** Monitor	European **Painter Insight** Monitor	European **Home Improvement** Monitor	European **Handyman** Monitor
Target group	Architects	Building contractors	HVAC installers	Electrical installers	Professional painters	Consumers	Handyman
Methodology							
Annual sample size	3,400 interviews	2,050 interviews	2,600 interviews	3,000 interviews	2,300 interviews	26,400 interviews	3,400 interviews
Country scope	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy	• Germany • United Kingdom • France • Netherlands • Belgium • Poland	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden • Austria	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy
Way of reporting	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly	Annually
2023 Theme topics	• Q1: Media orientation • Q2: BIM • Q3: Prefab • Q4: Sustainability	• H1: Purchase channels • H2: Sustainability	• Q1: Sustainability • Q2: Services • Q3: Purchase channels • Q4: Training needs	• Q1: Media orientation • Q2: Training needs • Q3: BIM • Q4: Purchase channels	• Trend tracking • Brand funnels • Purchase channels	• Q1: Orientation; sustainability • Q2: Purchase Channels; online performance of DIY stores • Q3: Branding; private labels • Q4: DIY vs DIFM; plans for 2024	• Segmentation • Orientation and media usage

Country coverage



Countries which we continuously research

Other countries which have been researched in past 2 years

Selection of customers

Construction				DIY		Installation	
ASSA ABLOY	AkzoNobel	Wienerberger	HILTI	OBI	adeo	ABB	BOSCH
ArcelorMittal	DAW	3M	SAINT-GOBAIN	ALLEGION	maxeda DIY Group	GRUNDFOS	hager
etex inspiring ways of living	FESTOOL	Villeroy & Boch 1748	DSM	V33	Ideal Standard	Schneider Electric	LG Life's Good
icopal	Interface	WD-40	Dulux	BRIGGS & STRATTON	KOHLER	MITSUBISHI ELECTRIC	Panasonic
KNAUF	OWENS CORNING	UNILIN FOR SMART LIVING	PPG	fischer innovative solutions	KÄRCHER	VIESSMANN	Vaillant
ROCKWOOL	sto Building with conscience.	VELUX	stiho	WAGNER	GROHE	signify	ShurTech Brands
Tarkett	TRESPA	tesa	DÖRKEN	Intergamma	Yale	sonepar	TTI

USP Marketing Consultancy