



# European Electrical Installation Monitor Q1-2022

Theme topic: Challenges towards a sustainable future

April-2022

A product by **USP** Marketing Consultancy

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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:**

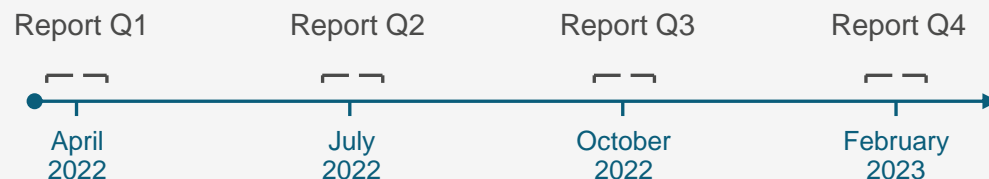
Q1: Sustainability

Q2: Smart buildings

Q3: Services in the installation market

Q4: Branding

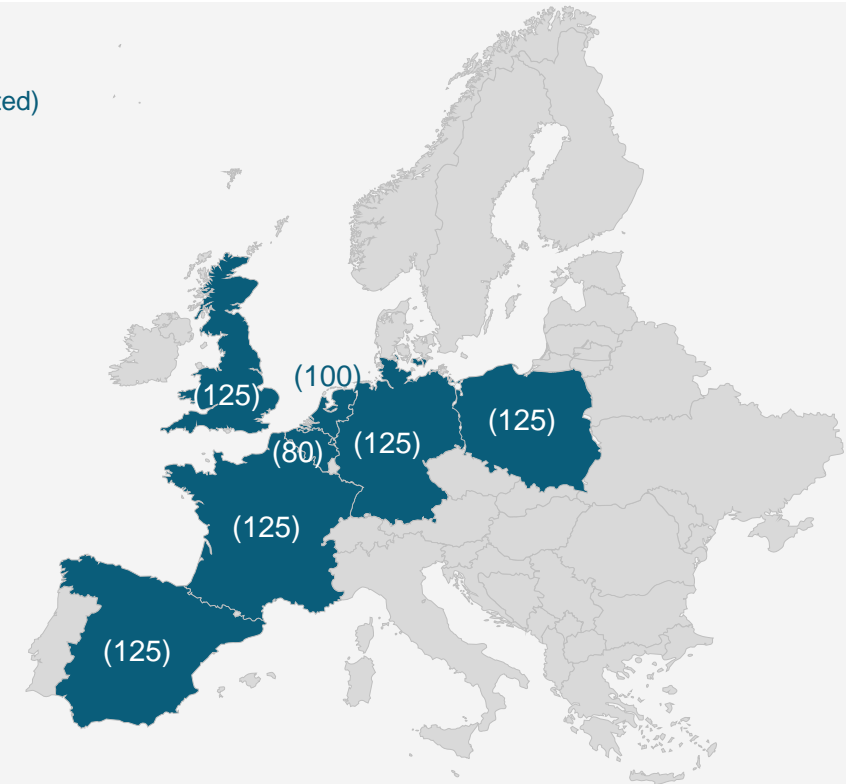
## THE TIMELINE



## COUNTRY SCOPE

(number of interviews conducted)

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



## PROJECT TEAM



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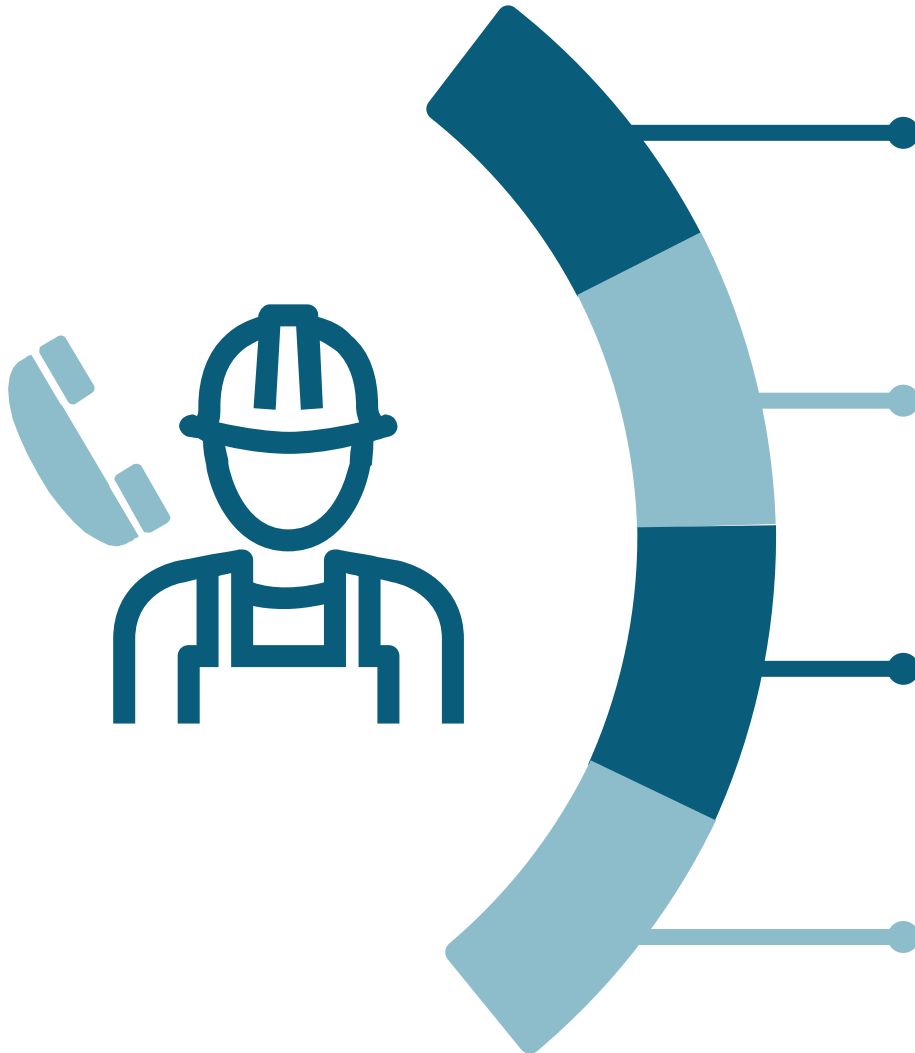
Research consultant

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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 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.

The role of installation systems can contribute enormously in 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 electrical 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 to 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;
  - The role of various stakeholders in driving sustainability;
  - Contribution of various products/ solutions to creating sustainable buildings;
- Current status of sustainable projects;
- Motivations & barriers;
- Leaders in sustainable solutions.

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# Key takeaways



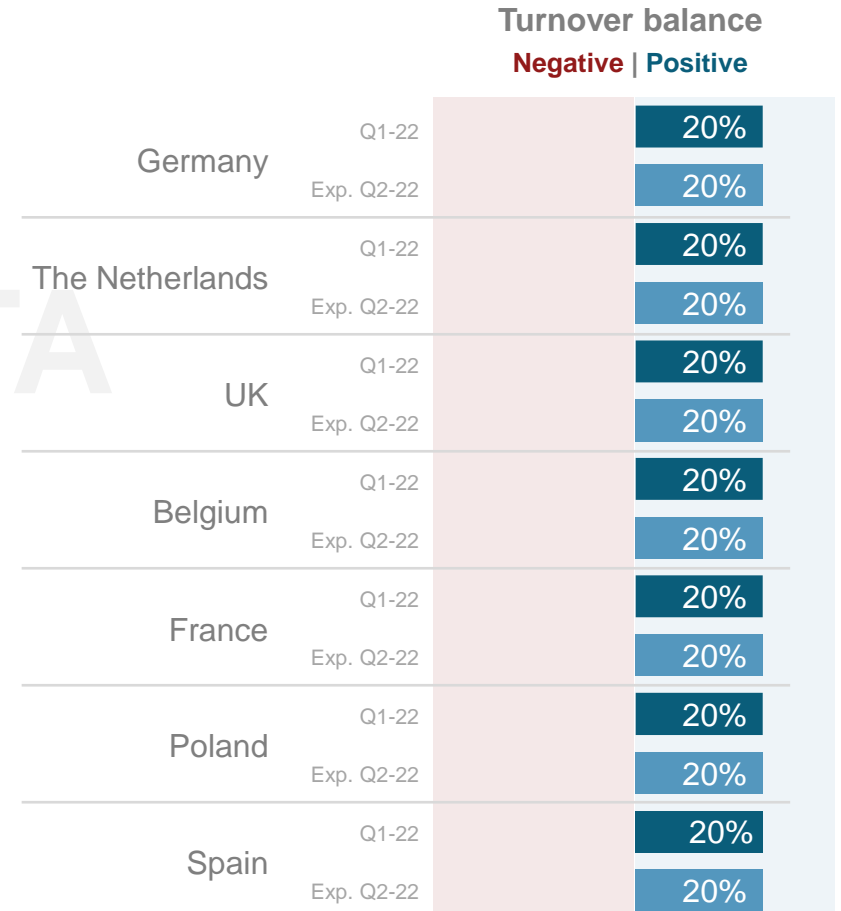
## Business Development

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

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DUMMY DATA



# Key takeaways

## 2

### Challenges towards a sustainable future

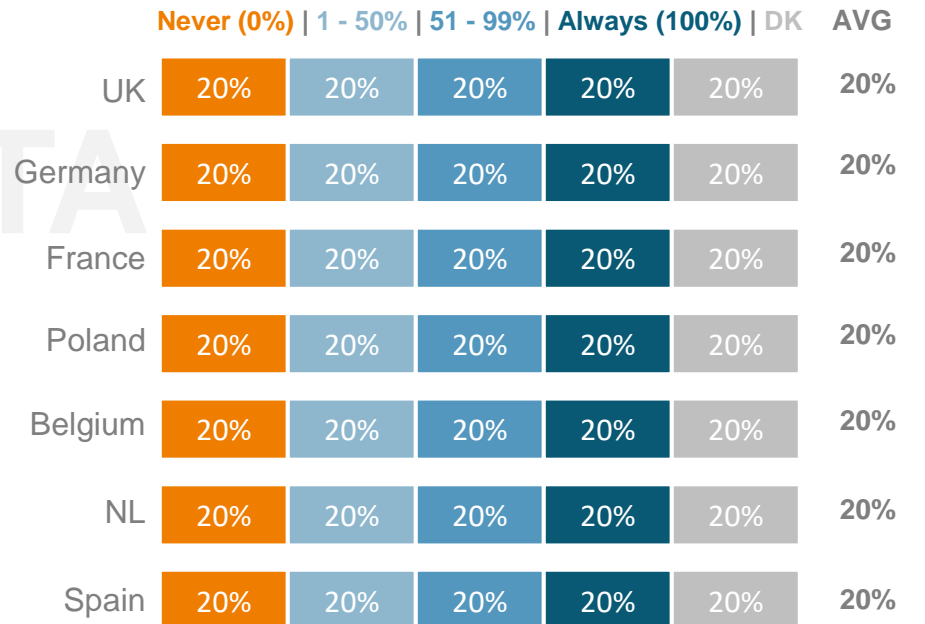
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DUMMY DATA

### Penetration of sustainability in installation

Q: In what share of your projects are you dealing with sustainability topics?





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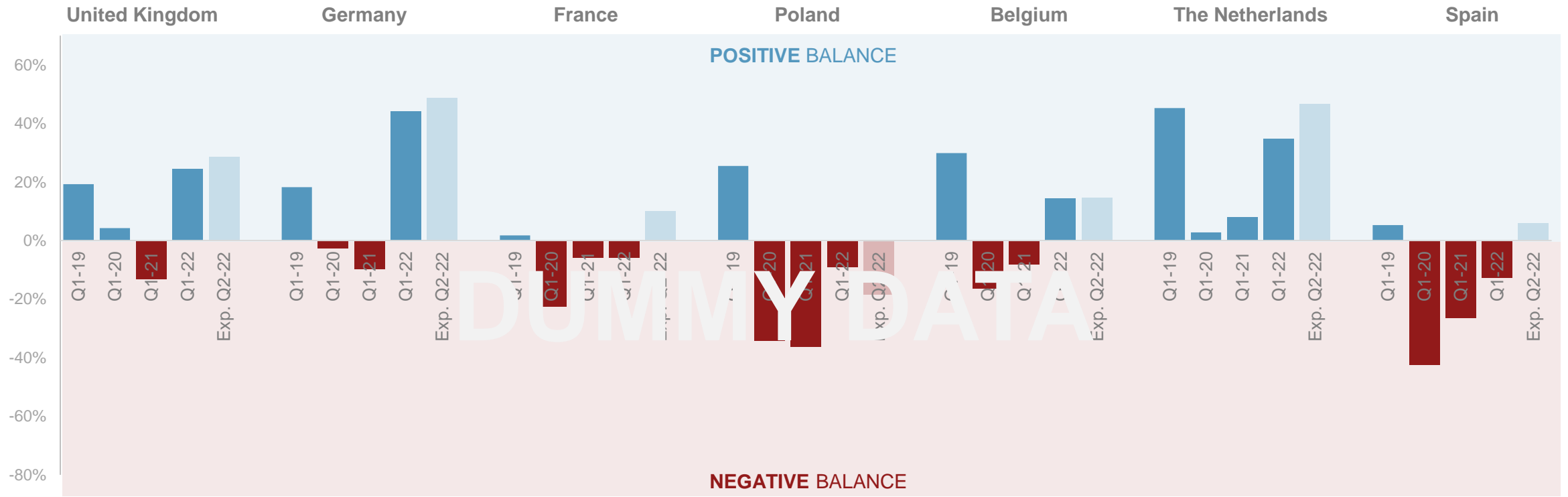


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## Turnover balance

Q: If you compare your turnover of Q1-22 to the same quarter last year, how did your turnover develop?

(% INCREASE minus % DECREASE)

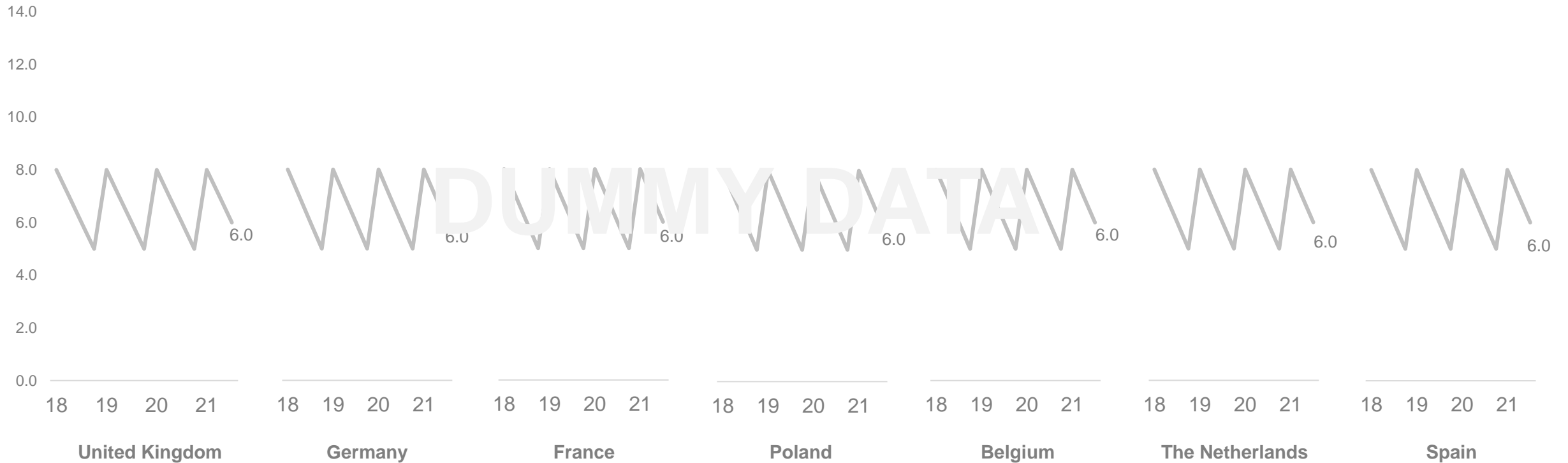


Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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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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## Impact of the war in Ukraine on installers business (EU level)

Q: Do you expect that the war in Ukraine will have any impact on your work and in what way?

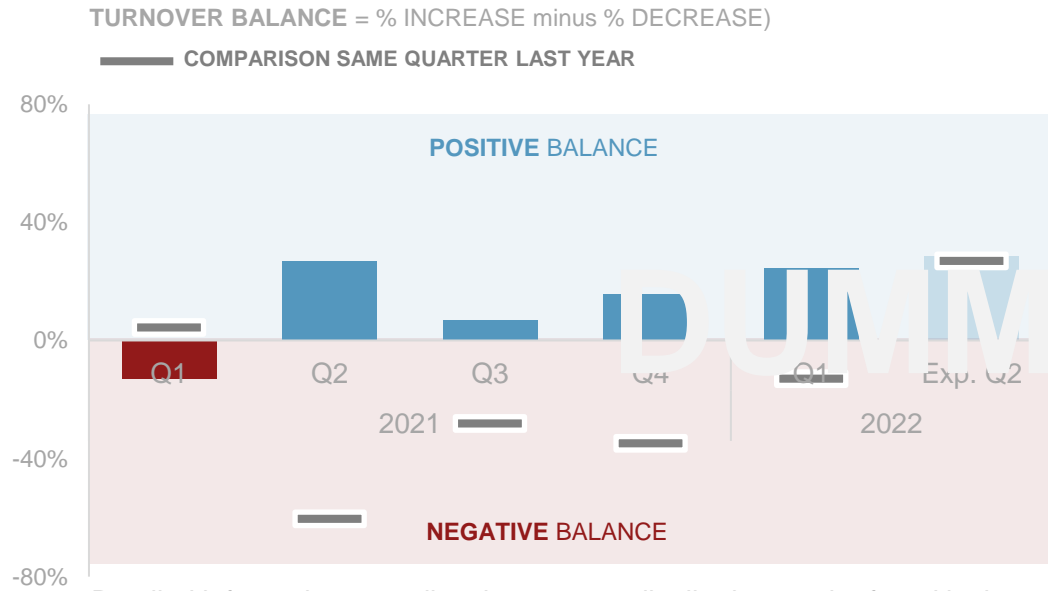


DUMMIES DATA

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## Turnover balance

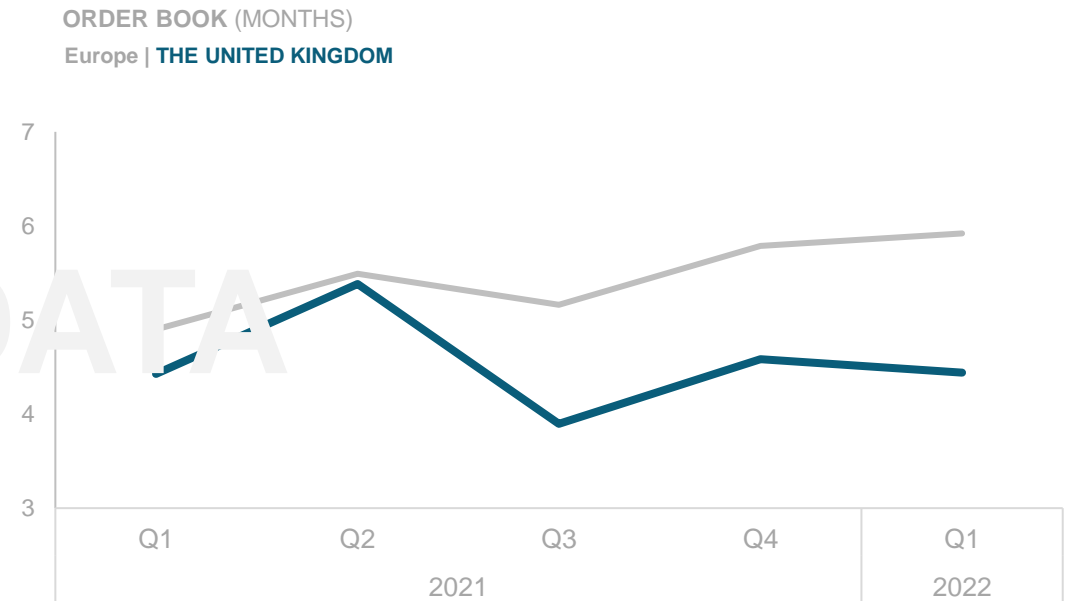
Q: If you compare your turnover of Q1-22 to the same quarter last year, how did your turnover develop? What are your expectations for the development in Q2-22?



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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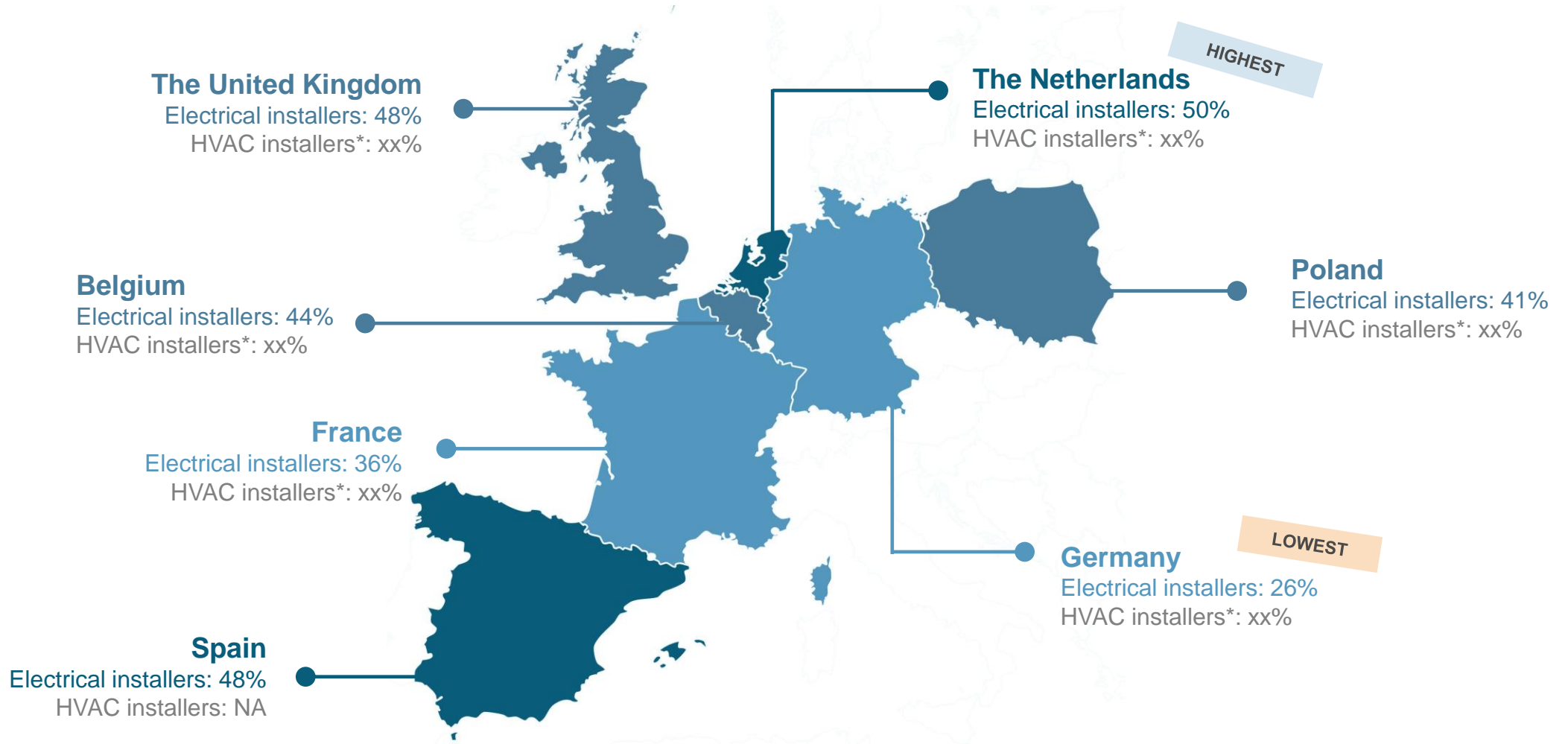
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# Current status of sustainability: Electrical vs HVAC installers

Average % of projects in which any kind of sustainability influence takes place  
(like energy efficiency, carbon footprint, using recycled materials or general regulation)

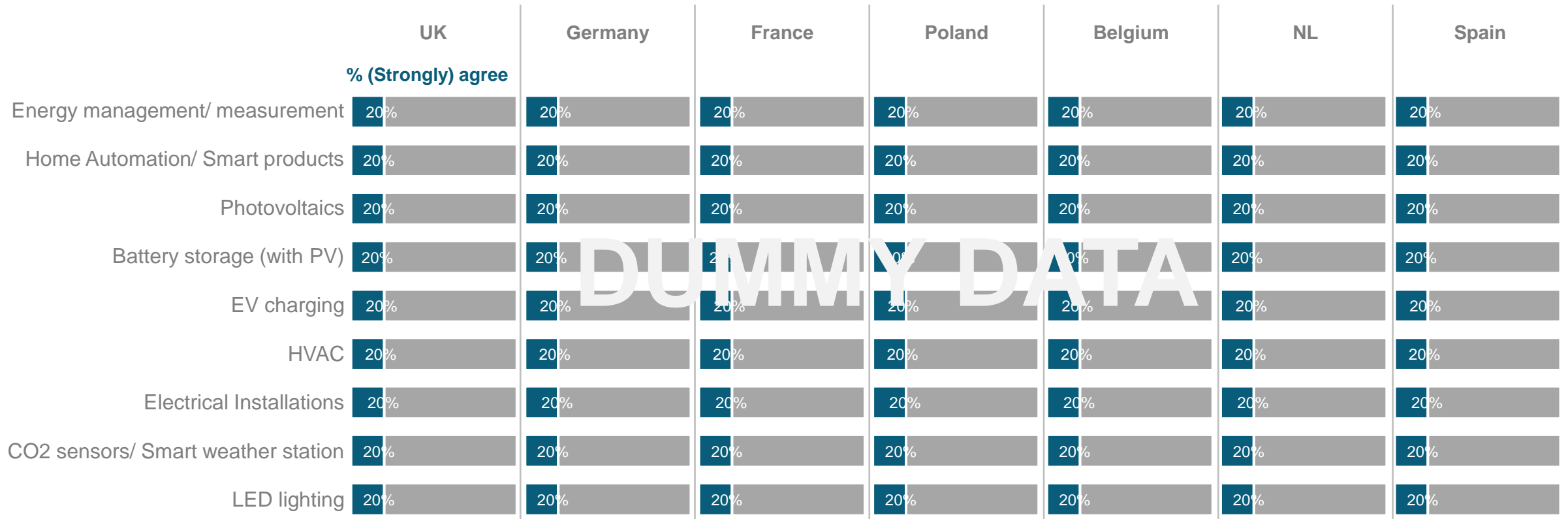


\*Source for HVAC installers: USP's European Mechanical Installation Monitor Q4-21

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**Most used installation products in sustainable solutions**

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





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### Leaders in sustainable solutions

Q: When thinking about advanced sustainable solutions, which manufacturers of electrical installation products come first to your mind? [Top-1]

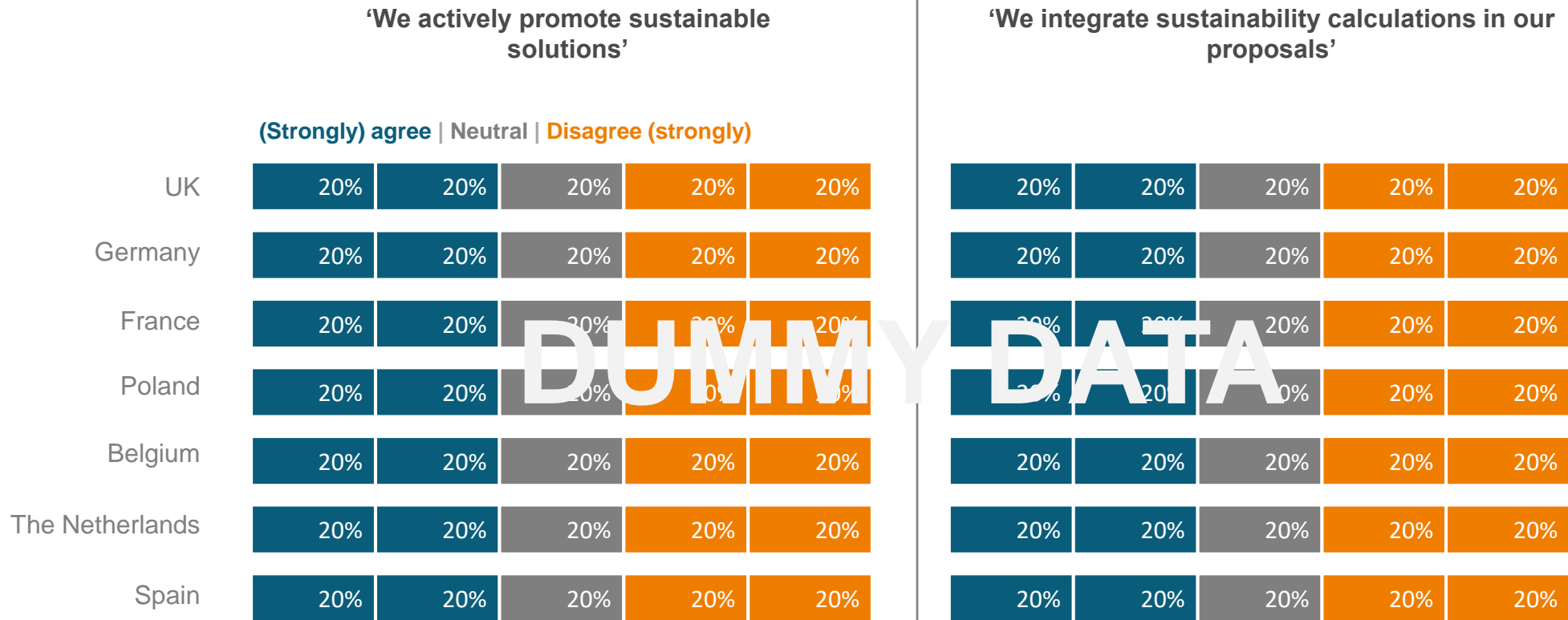


DUMMY DATA

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## Installers' sentiment

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



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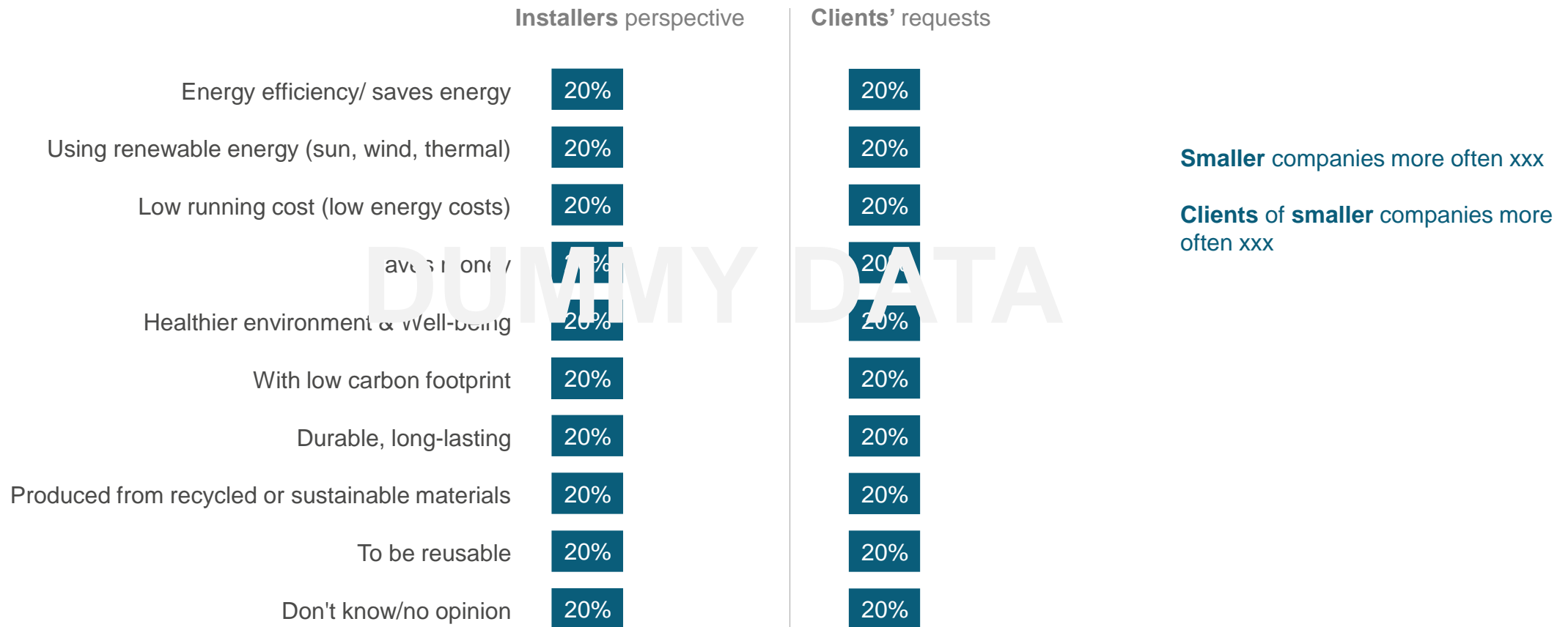


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## Perception of sustainability

Q: In the electrical industry the manufacturers often talk about sustainable solutions. What are, according to you, the main characteristics of a sustainable solution? [Top-10]

Q: When your clients ask for sustainable solutions, what do they most often search for? [Top-10]



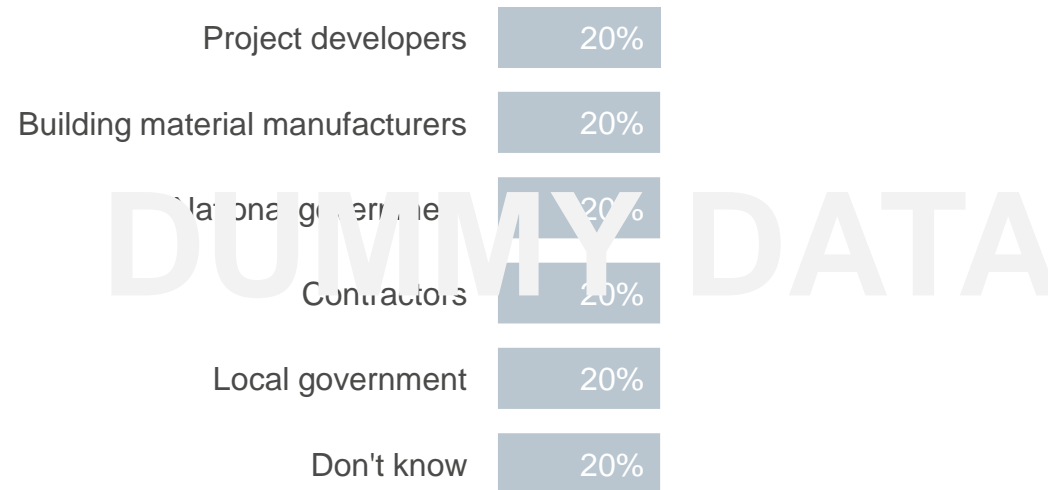
Base: n= 125, all installers

Base: n= 85, if client asks for sustainable solutions

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## Driving forces

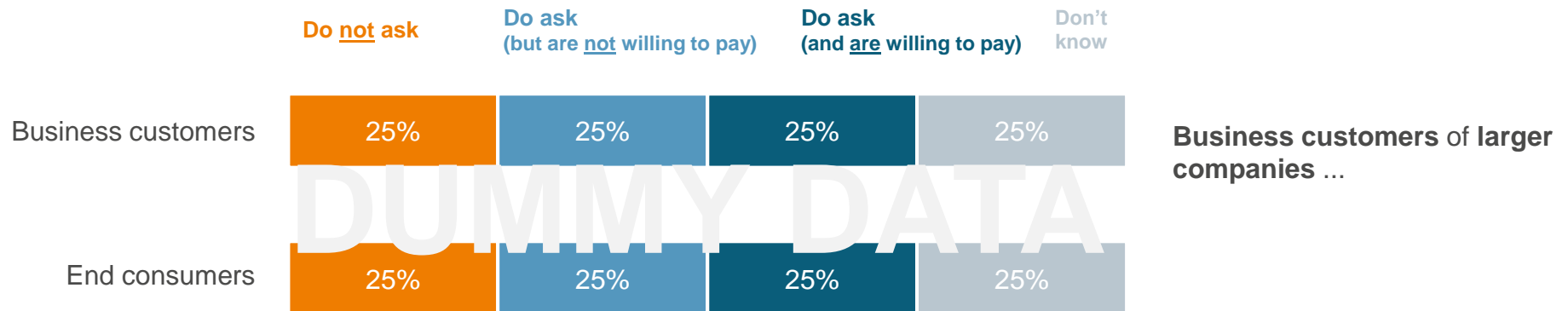
Q: Which stakeholders are the most influential ones when it comes to promoting sustainability/ sustainable solutions? [Top-5]



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## Willingness to invest in sustainability

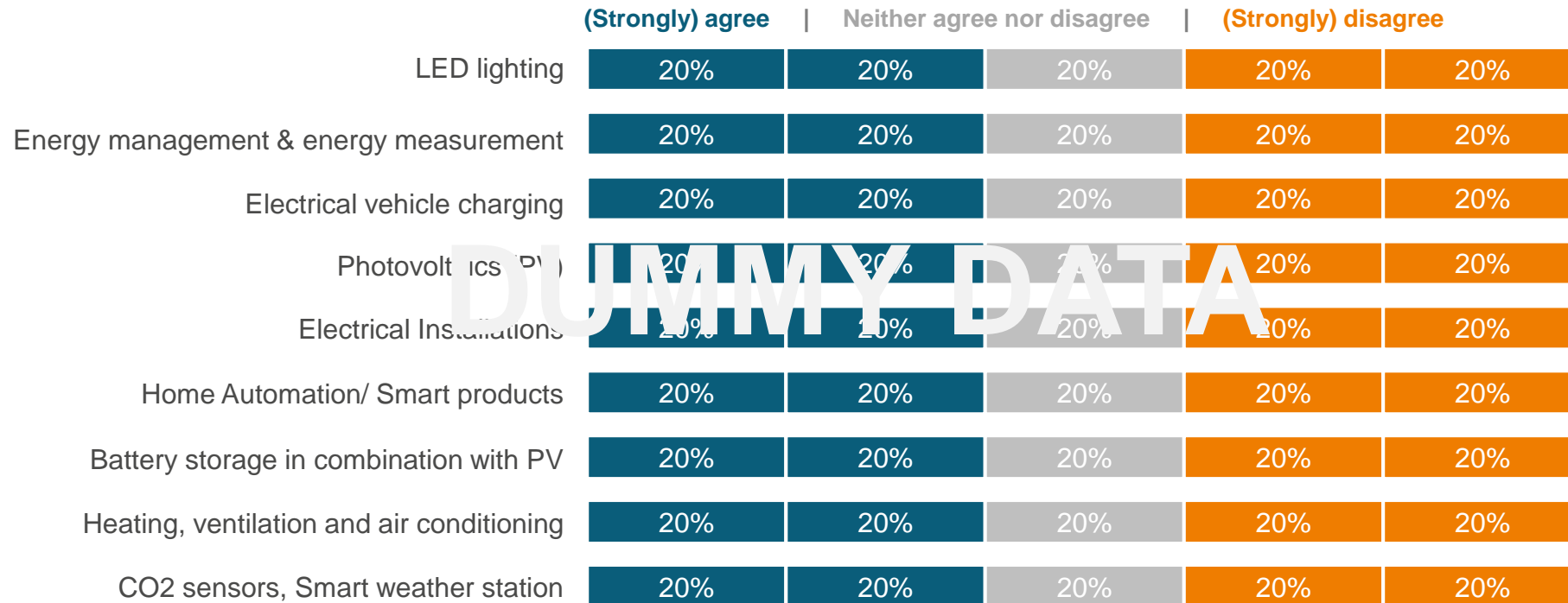
Q: If we divide your clients in two main types: business clients (contractors, architects, building owners etc) and end consumers, to what extent do those two types of customers ask for sustainable installation solutions?



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**Installation products/ solutions**

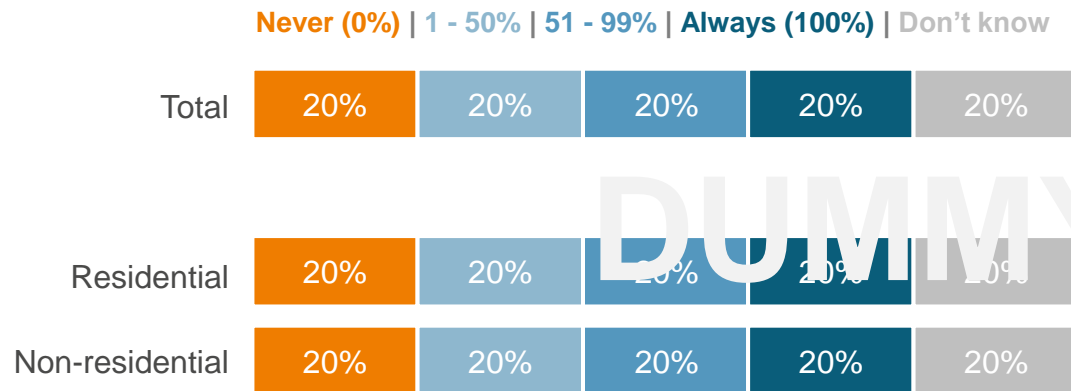
Q: To what extent do you agree that the following products/ solutions can be used for creating sustainable buildings?



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## Penetration of sustainability in installation

Q: In what share of your projects are you dealing with sustainability topics like energy efficiency, carbon footprint, using recycled materials, and compliance of the products with sustainability regulations?

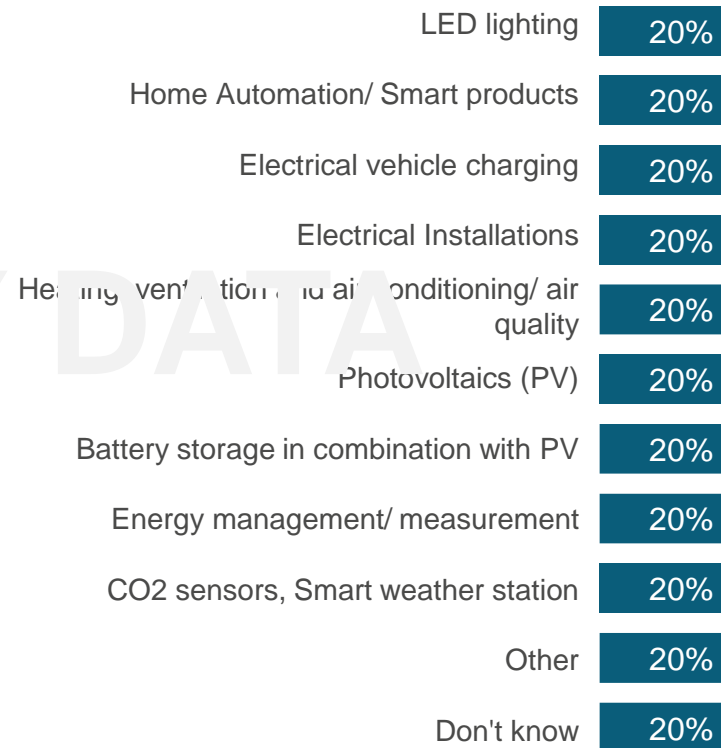


xx% believes that the demand for sustainable products will **increase in the coming 2 years**

Base: n= 125, all installers

## Most used installation products in sustainable solution

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



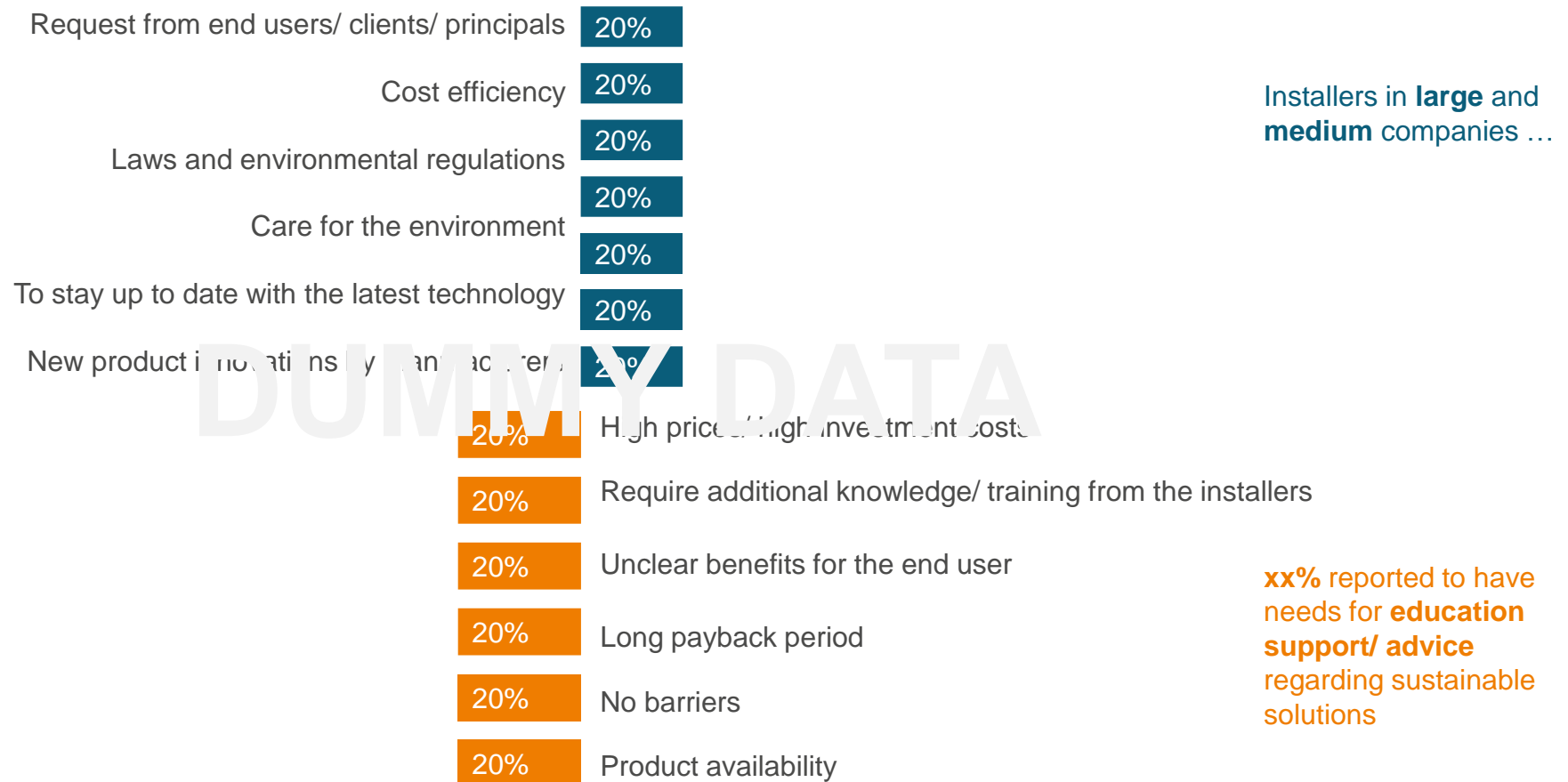
Base: n= 111, if involved in sustainability projects



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## Drivers and barriers of sustainability

Q: What are the most important drivers of sustainability in the installation sector? | Q: And what are the main challenges for you as an installer with regard to offering and working with sustainable solutions?



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## Leaders in sustainable solutions

Q: When thinking about sustainability/ advanced sustainable solutions, which manufacturers of electrical installation products (e.g. energy management, home automation) come first to your mind?



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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



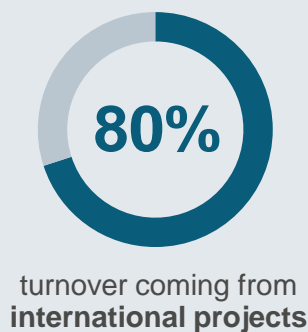
**Market specialist**  
installation, construction, home improvement and real estate

Dedicated and multi-client research

**Active in the market for 29 years**

250+ dedicated market research projects annually

## Revenue distribution



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**



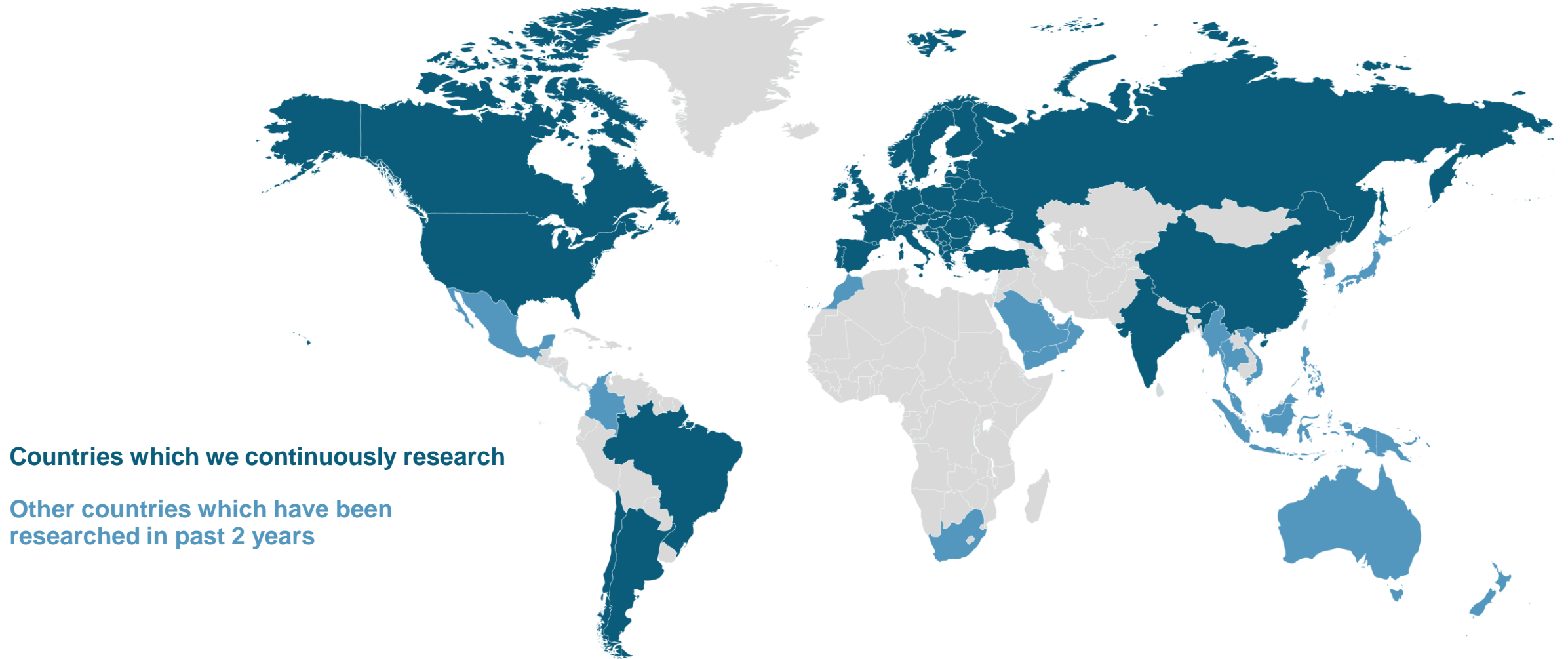
## Dedicated market research

- 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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