



REPORT IMPRESSION
European Electrical Installation Monitor Q2-2023
Theme topic: Training needs
July-2023

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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.

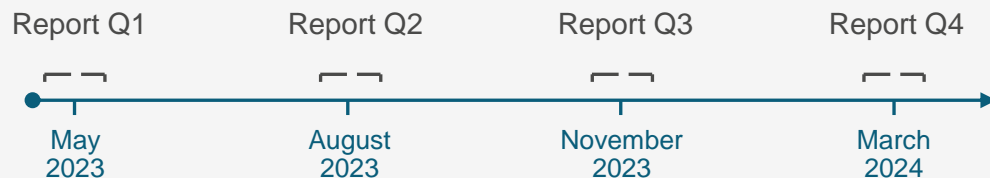
THE RESEARCH TOPICS

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

Quarterly theme topics in 2023:

- Q1: Media orientation
- Q2: Training needs**
- Q3: BIM
- Q4: Purchase channels

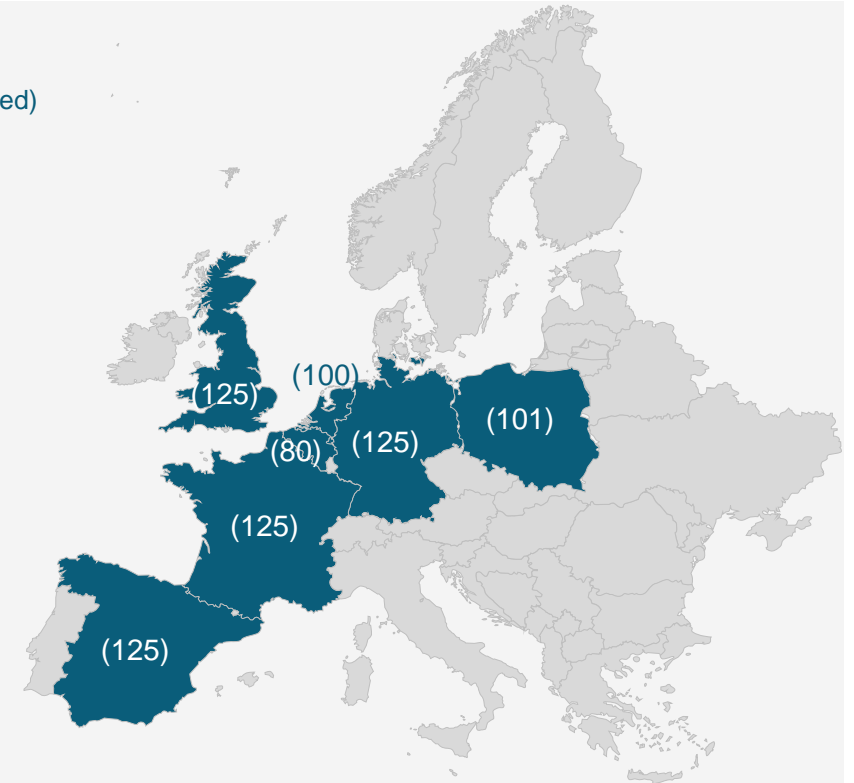
THE TIMELINE



COUNTRY SCOPE

(number of interviews conducted)

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



PROJECT TEAM



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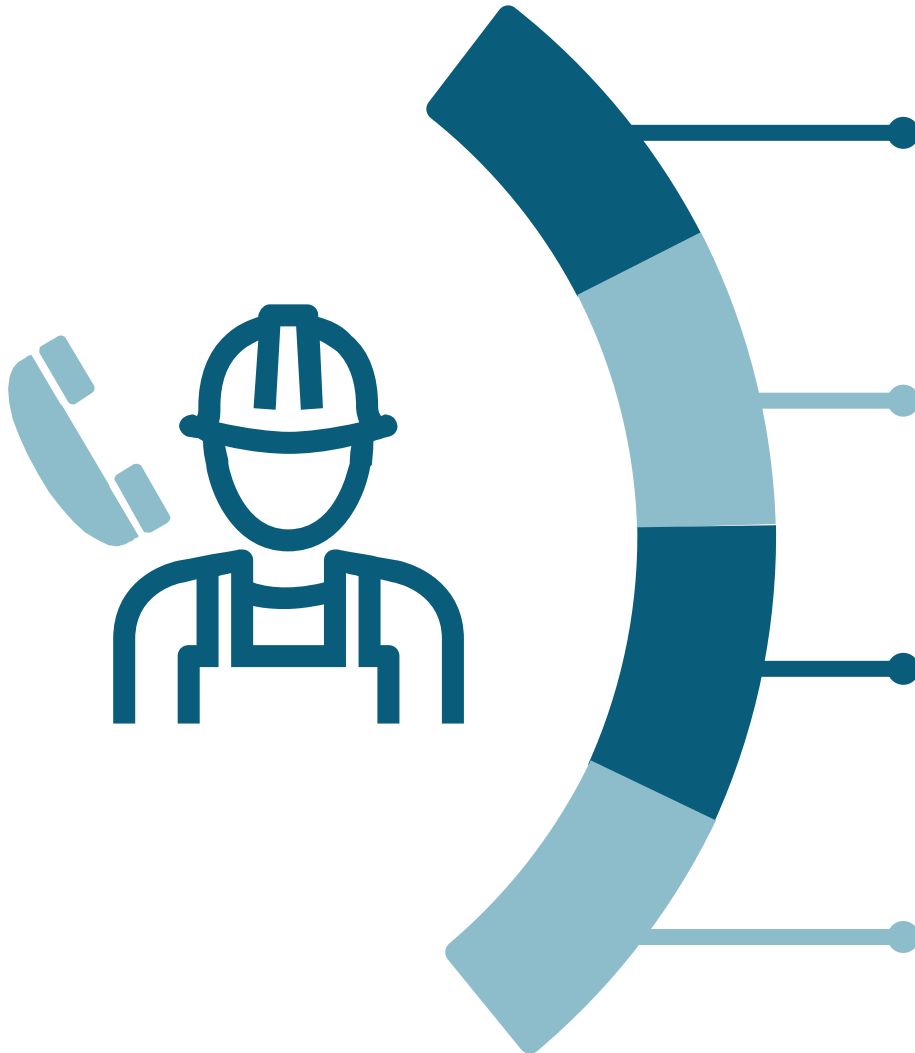


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About target group & methodology



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 Q2 theme topic



Surveying the training needs topic...

Technical developments are growing rapidly and topics like home automation, sustainable solutions and energy transition are becoming more and more part of the electrical installation sector. To keep up with all these developments, it is important for installers to keep their knowledge and skills up to date by means of trainings/ courses that they can follow.

...allows for better understanding how you can best support installers in this area

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

- To what extent installers follow trainings;
- For which electrical product groups trainings are mostly needed;
- The share of online versus face-to-face trainings;
- Installers' preferences on how and when trainings are organised;
- Installers' perception of the labour shortage and potential solutions to it

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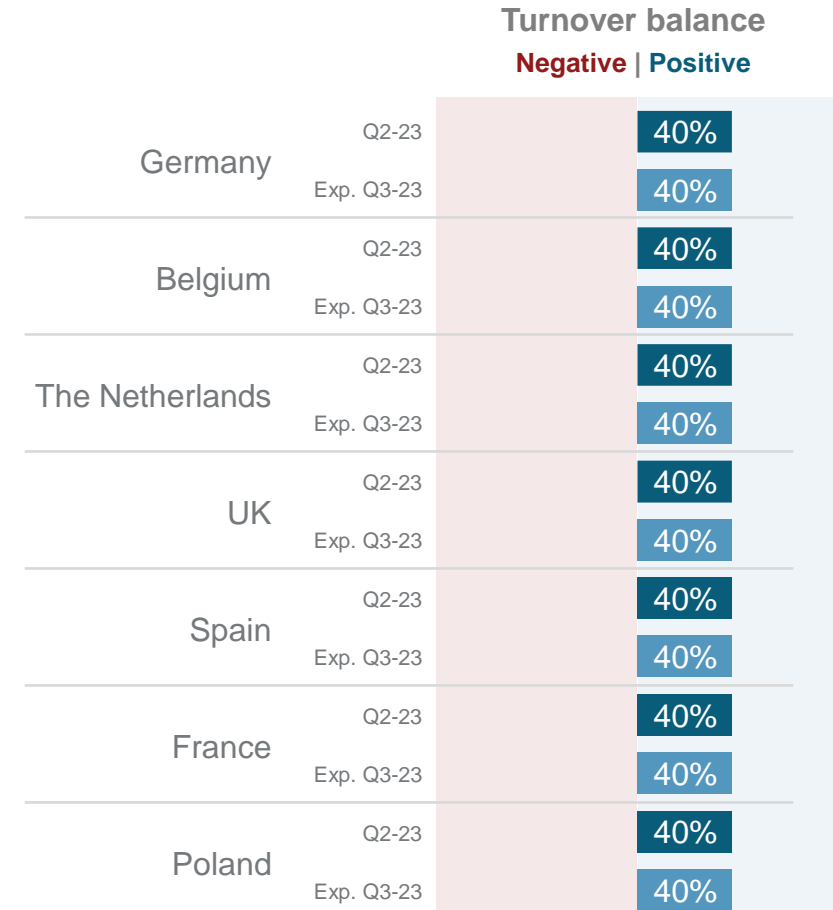
DUMMY DATA



Business Development

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Key takeaways

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Training needs and labour shortage

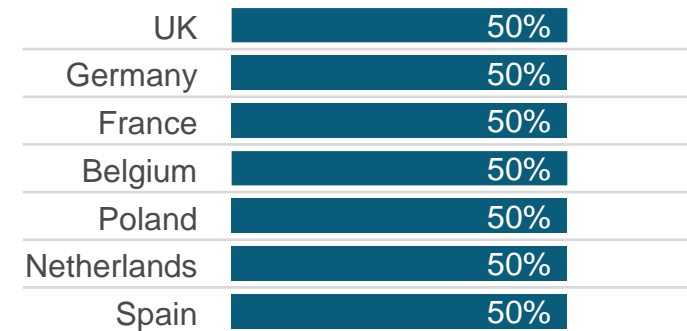
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Labour shortage conclusion

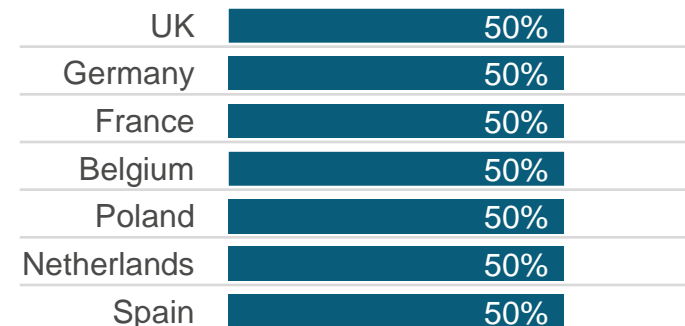
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The effect of trainings organized by manufacturer on the installers and their use of manufacturers' products



[* % of installers who would switch completely/ buy more often from the manufacturer that organized the training]

Labour shortage in the electricals installation sector



[* % of installers who experienced labour shortage]

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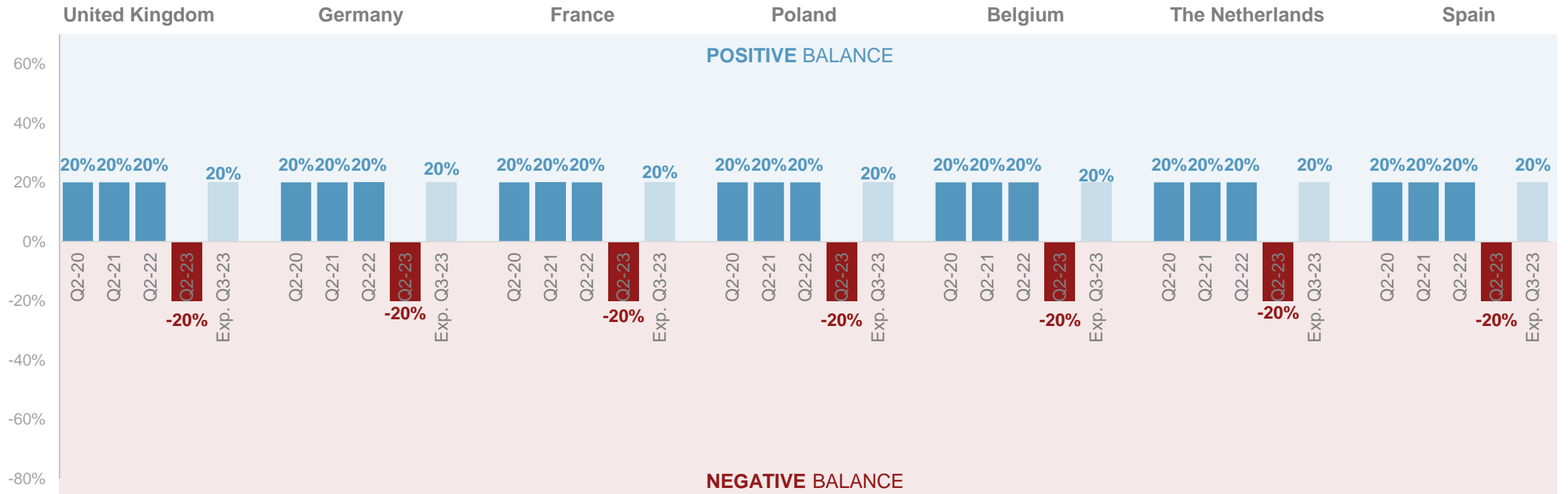
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DUMMY DATA

Turnover balance

Q: If you compare your turnover of Q2-23 to the same quarter last year, how did your turnover develop?

(% INCREASE minus % DECREASE)



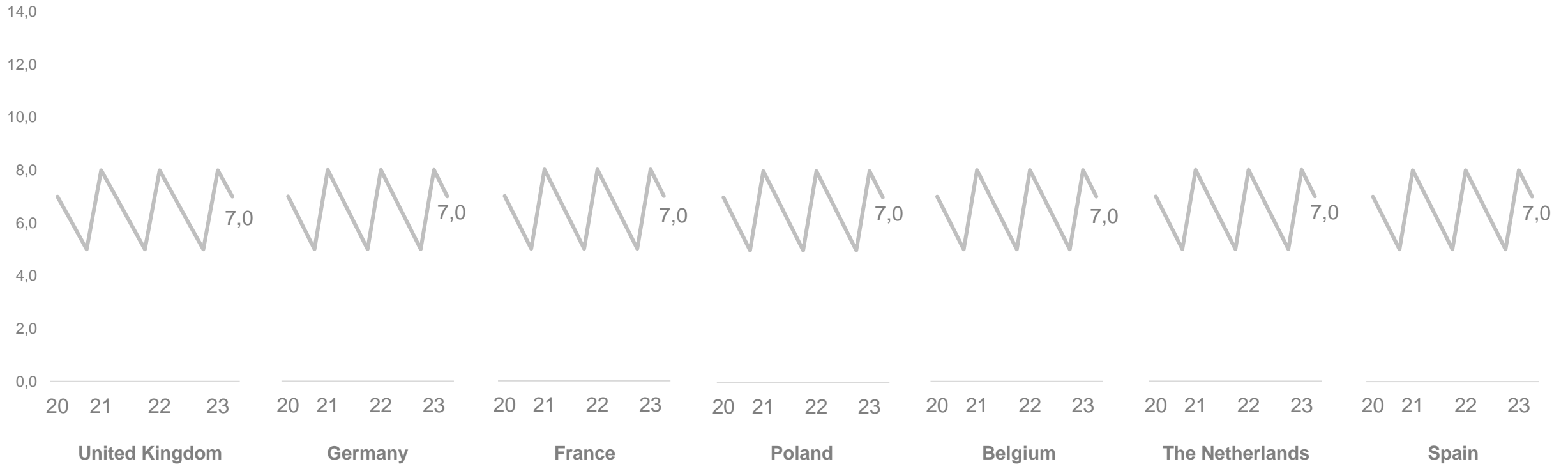
Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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DUMMY DATA

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)



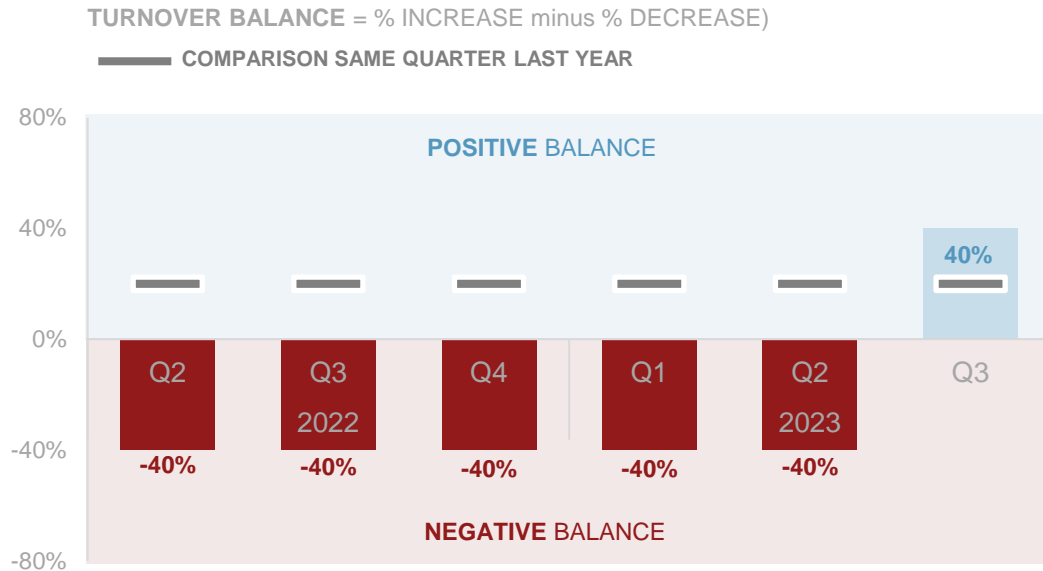
Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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DUMMY DATA

Turnover balance

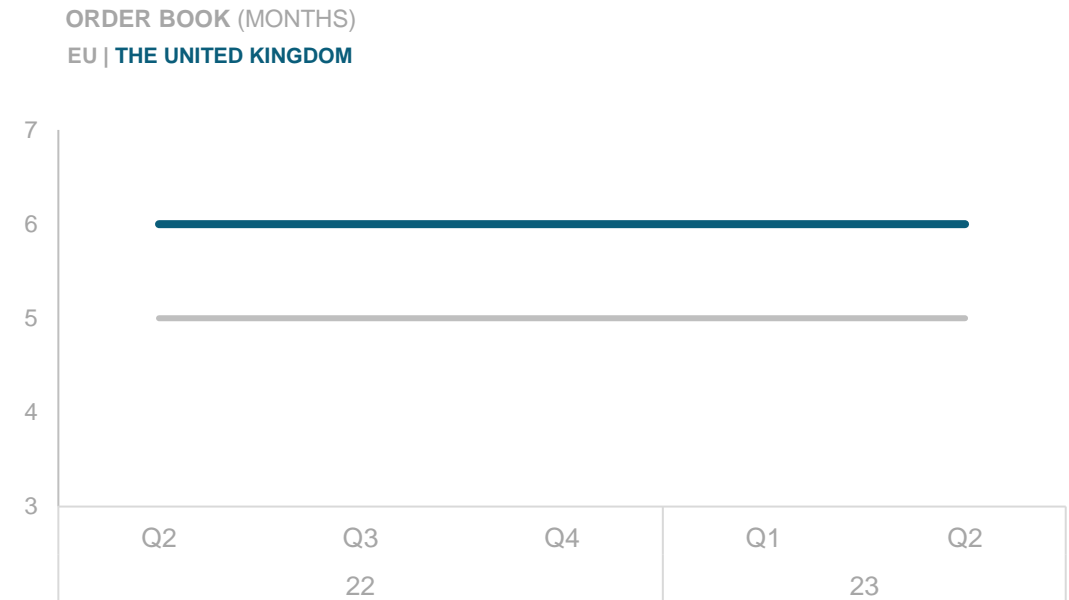
Q: If you compare your turnover of Q2-23 to the same quarter last year, how did your turnover develop? What are your expectations for the development in Q3-23?



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

Order book portfolio

Q: How big is your current order book portfolio?



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- In the theme part of Q2 2023, special attention is paid to [Training needs](#).
- The installation sector is facing a major challenge in the shortage of experienced and knowledgeable labour. One remedy to the shortage is to provide training to installers. It is therefore crucial for manufacturers, often a source of training, to understand training needs. An additional question has arisen during the COVID-19 pandemic, during which many installers attended online and/ or mixed method trainings, in addition to the traditional way of face-to-face training.
- This chapter will give insight into installers' experiences of training courses of the past year and the training needs in the future.
- The following topics will be discussed in this chapter:
 - Trainings during the COVID-19 period and expectations of the way to attend future trainings
 - Training preparations
 - Preferred ways of training
 - Relevant training topics and preferred settings
 - The best timing of trainings
 - Certification

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DUMMY DATA

Key facts about trainings in general

Yes, attending trainings | No, but will do in future | No and will not/ don't know in future



In general it appears that:

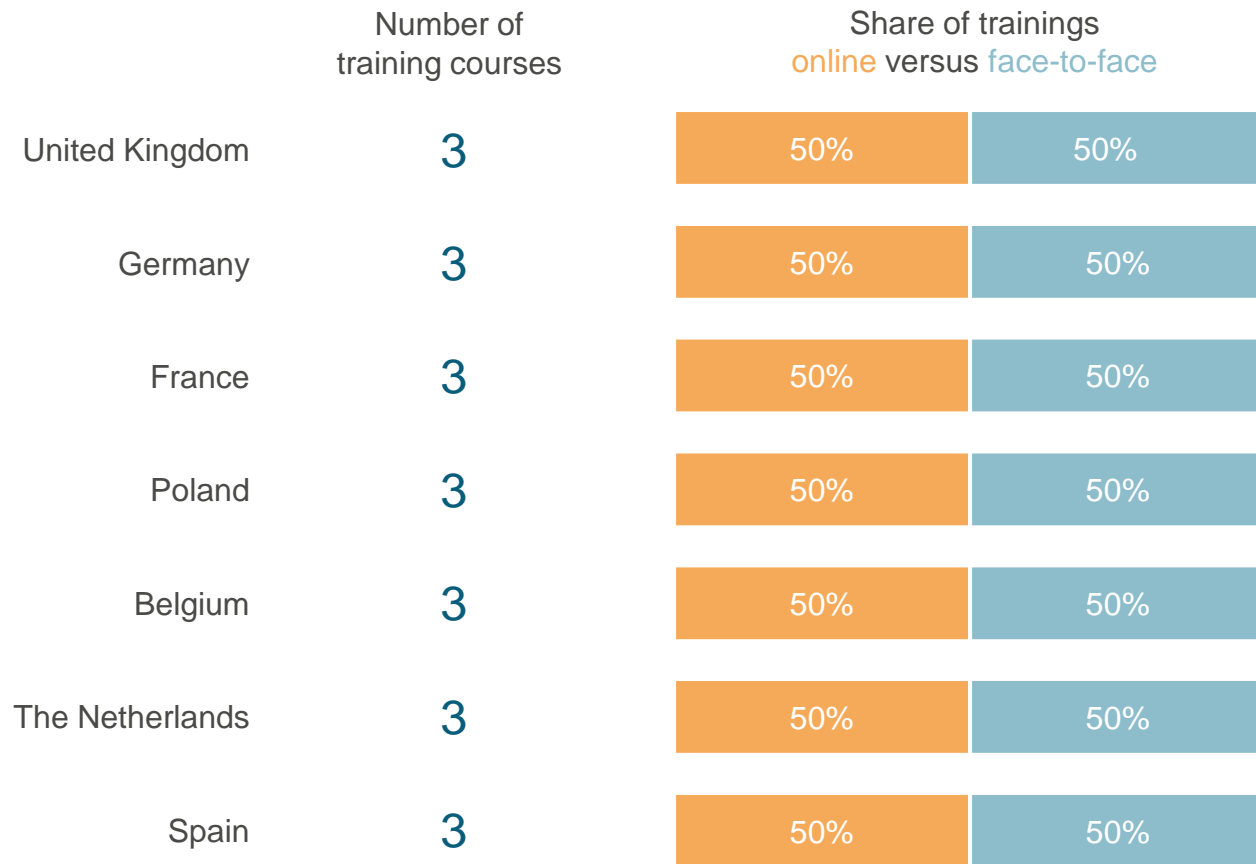
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Key facts about trainings



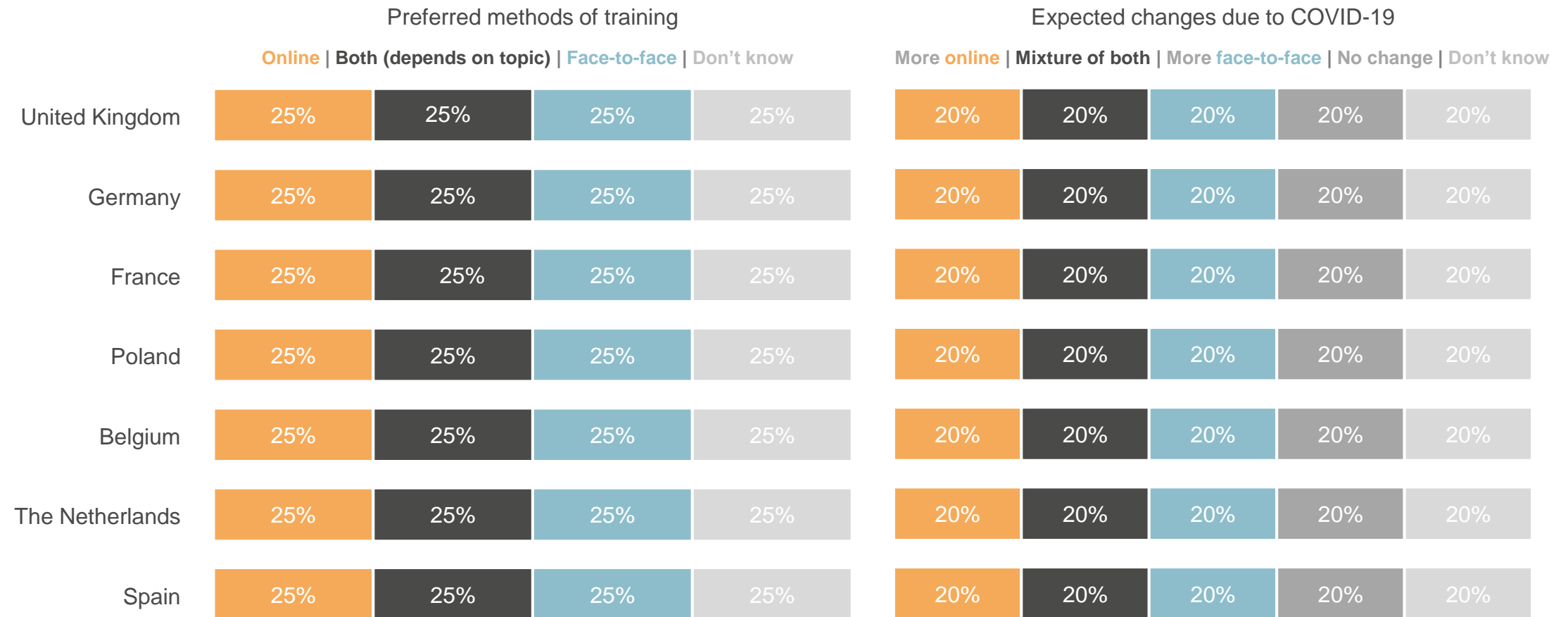
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DUMMY DATA

Preferences and expected changes regarding training methods



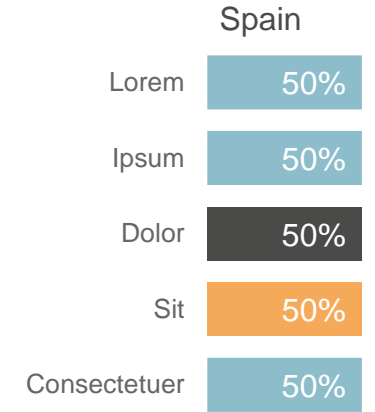
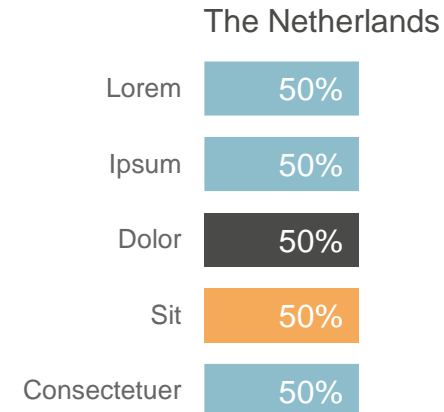
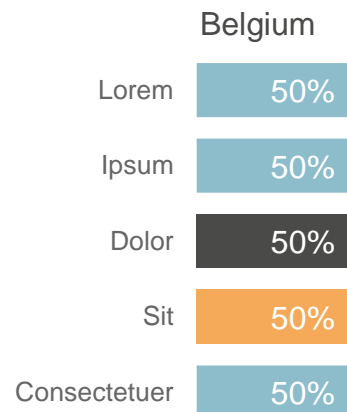
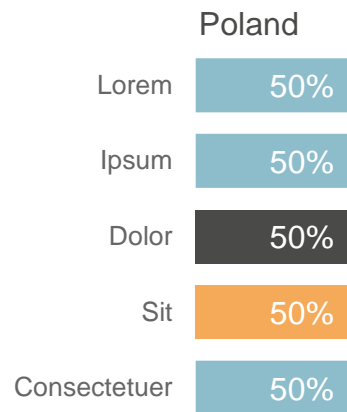
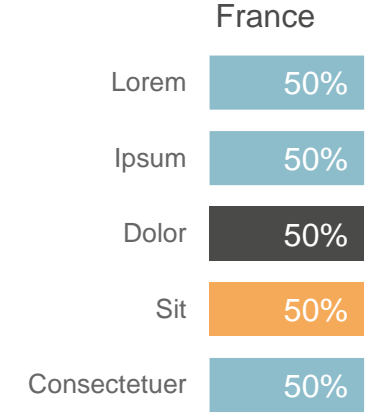
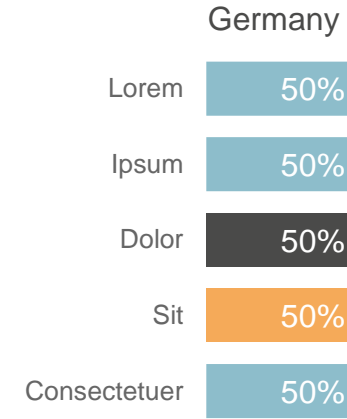
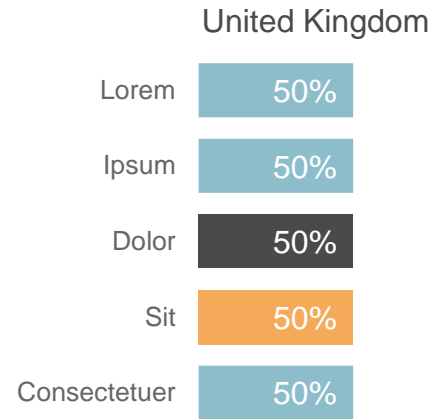
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DUMMY DATA

Best topics for trainings – Top 5

Meanings of the bar colours:

- Training mainly preferred online
- Training mainly preferred face-to-face
- No preference in training method



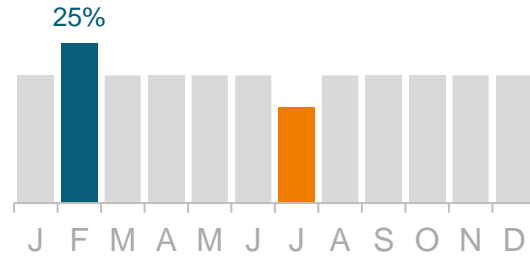
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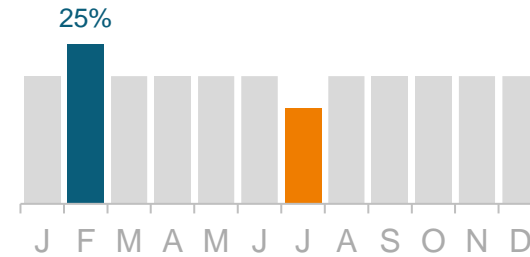
Timings for trainings

Best | Worst month for training

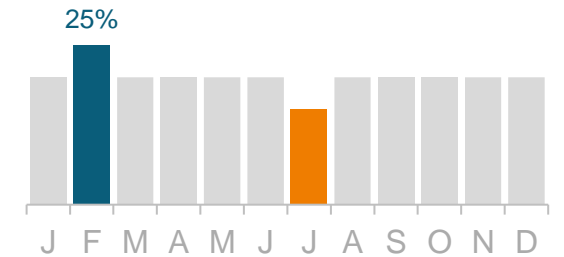
United Kingdom



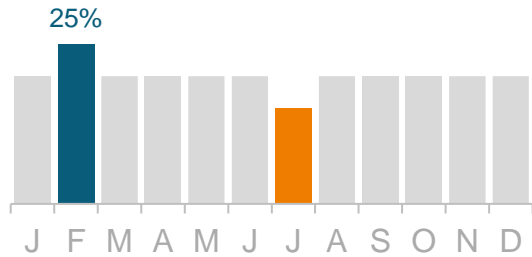
Germany



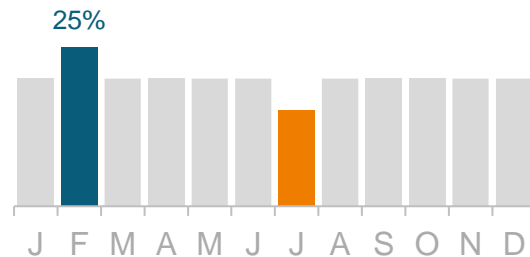
France



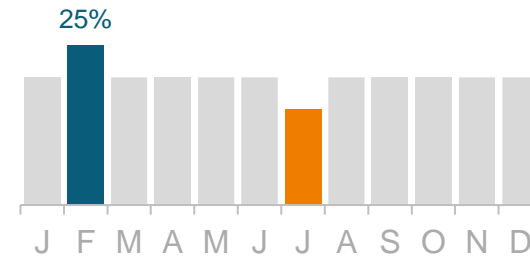
Poland



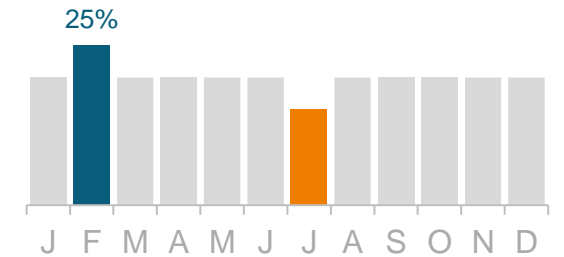
Belgium



The Netherlands



Spain



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DUMMY DATA

Ways of getting information about trainings

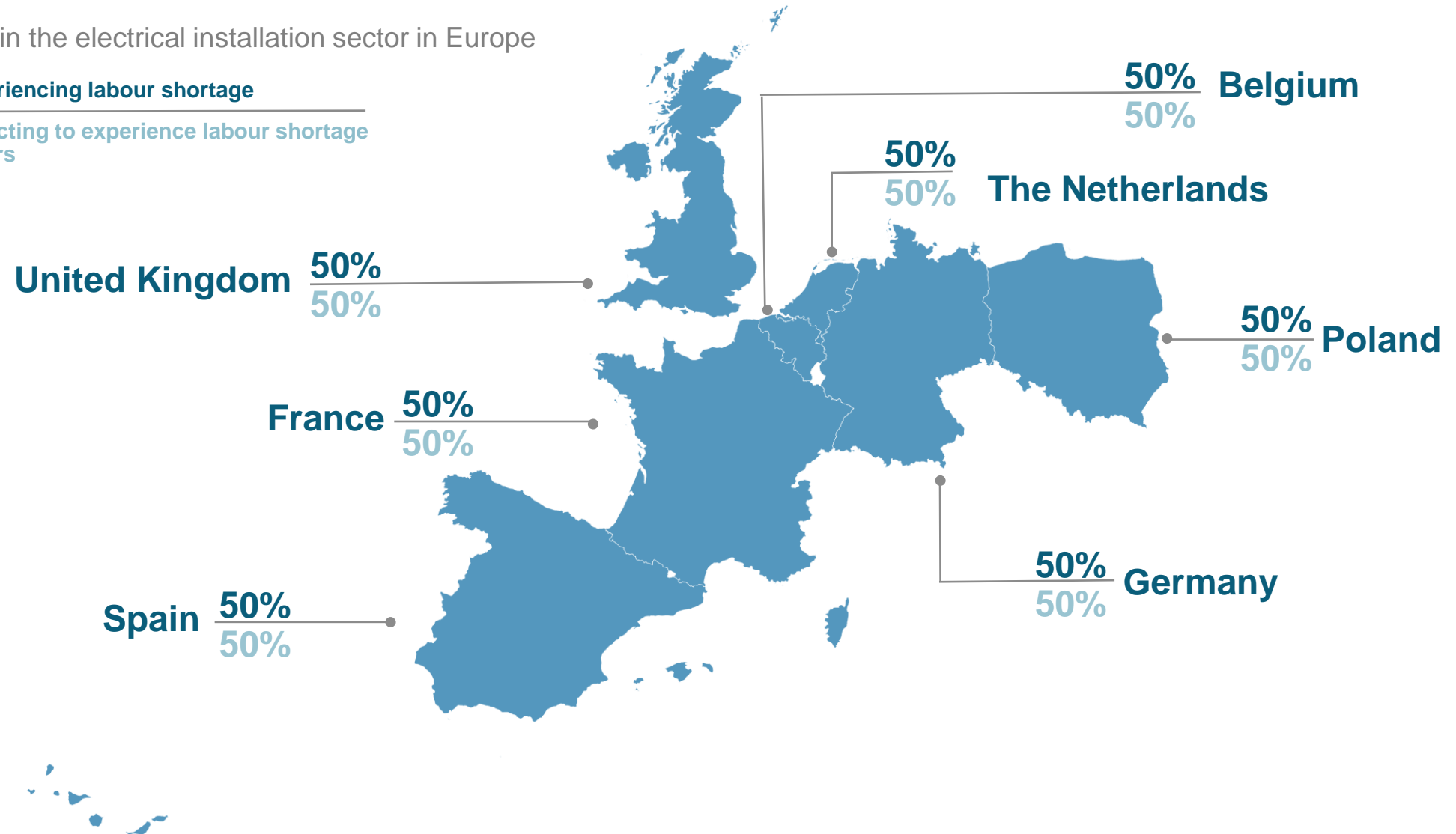
	United Kingdom	Germany	France	Poland	Belgium	The Netherlands	Spain
Manufacturer							
Email/ newsletter	20%	20%	20%	20%	20%	20%	20%
Sales representative	20%	20%	20%	20%	20%	20%	20%
Website	20%	20%	20%	20%	20%	20%	20%
Wholesaler							
Email/ newsletter	20%	20%	20%	20%	20%	20%	20%
Sales representative	20%	20%	20%	20%	20%	20%	20%
Website	20%	20%	20%	20%	20%	20%	20%
Other							
Professional organisation	20%	20%	20%	20%	20%	20%	20%
Searching on the internet	20%	20%	20%	20%	20%	20%	20%
Colleagues	20%	20%	20%	20%	20%	20%	20%

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Labour shortage in the electrical installation sector in Europe

% of installers experiencing labour shortage

% of installers expecting to experience labour shortage in the coming 5 years



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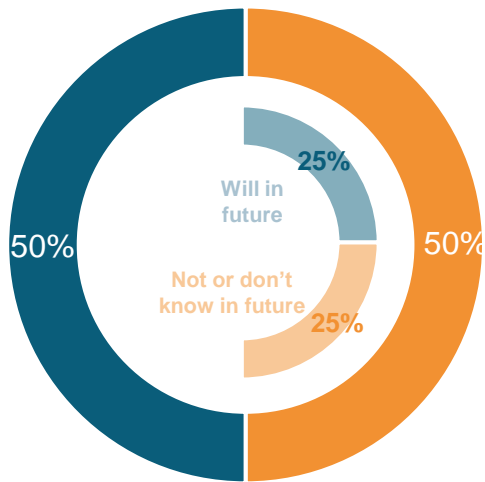
Appendix



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Share of installers attending trainings

Yes | No [If no: will they attend in the future?]



Base: n=125, all

Attend trainings By FTE (% Yes)

1-4 FTE	5-14 FTE	15+ FTE
95%	100%	100%

The most mentioned reasons for not attending trainings in the future:
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Training days per year

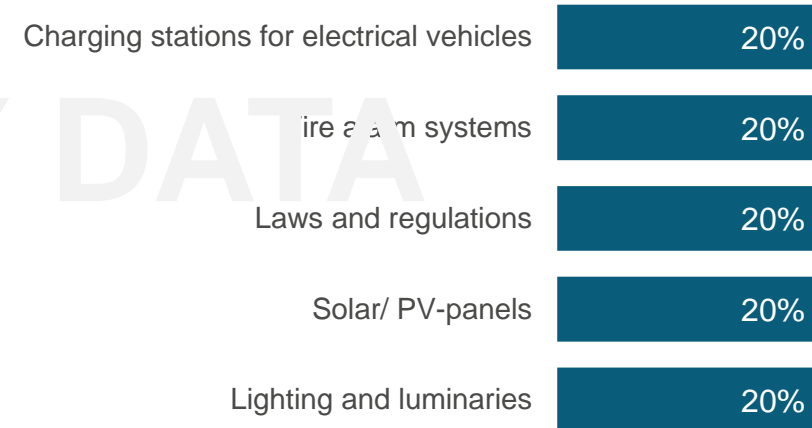
Q: And approximately how many days in total have you/ your employees spent on training last year (2022)?



Base: n=, if attending trainings

Attending trainings in electrical product categories - Top 5

Q: For which electrical product categories does your company normally attend training?



Base: n=, if attending trainings or – if not yet – expect to do so in future

Training courses in 2022

Q: Approximately how many training courses in total has your company attended last year (2022)?

XY courses

Base: n=, if attending trainings



By FTE

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DUMMY DATA

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Share face-to-face versus online trainings in 2022

Q: What share of the training you/ your employees attended last year was online/ digital training and what share was face-to-face training?

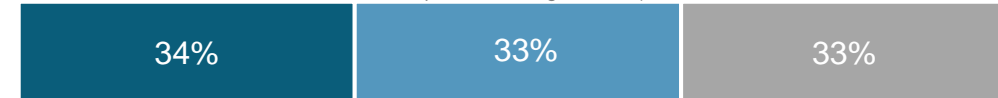


Base: n=, if attended Training courses in 2022

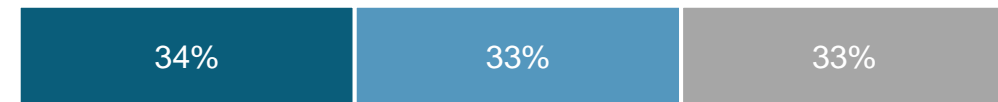
Training organisers

Q: If you look at the face-to-face / online training you/ your company participated in last year, was it mainly organised by ...

Wholesalers | **Manufacturers** | **Other organisations** | **Don't know**
(like training institutes, professional organisations)



Base: n=, if attended face-to-face trainings



Base: n=, if attended online trainings

DUMMY DATA

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Expectations changes in attending trainings

Q: Do you expect the way you attend training in the future to change towards ...?

More focus **online** | Mixture of both | More focus **face to face** | No change | Don't know



Base: n=, if attending trainings or – if not yet – expect to do so in future

DUMMY DATA

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Ways of getting information about trainings

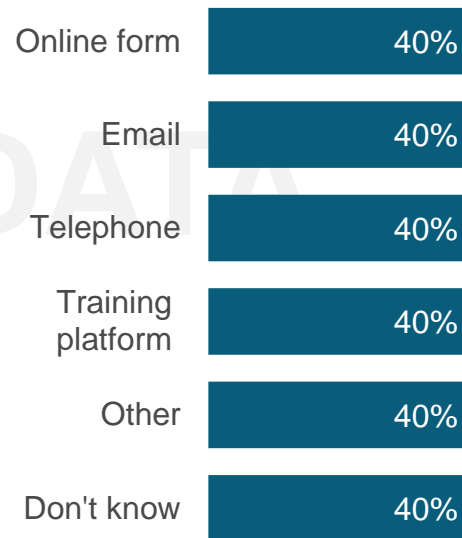
Q: How do you normally get the information about a training itself?



Base: n=, if attending trainings or – if not yet – expect to do so in future

Ways of booking trainings

Q: How do you normally book a training?



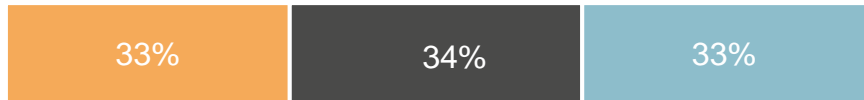
Base: n=, if attending trainings

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Preference online versus face-to-face trainings

Q: Does your company have a strong preference towards online/digital or face-to-face trainings?

Online/digital | Both (depends on topic) | Face to face | Don't know



Base: n=, if attending trainings or – if not yet – expect to do so in future

Preferred ways of trainings

Q: When it comes to training in general what are the most preferred ways of training for you?

		By company size		
		1-4 FTE	5-14 FTE	15+ FTE
Face-to-face at your location	40%	40%	40%	40%
A mix of online/ digital and face-to-face training	40%	40%	40%	40%
On-demand training	40%	40%	40%	40%
Physical on-the-job site training	40%	40%	40%	40%
Face-to-face at manufacturers' location	40%	40%	40%	40%
Training at the wholesalers by the manufacturer(s)	40%	40%	40%	40%
Personalized training platform as one-stop shop for all training opportunities	40%	40%	40%	40%
Live webinar with options to ask questions	40%	40%	40%	40%
Training platform with 'always-on' content	40%	40%	40%	40%
On-site training via mobile devices	40%	40%	40%	40%

Base: n=, if attending trainings or – if not yet – expect to do so in future

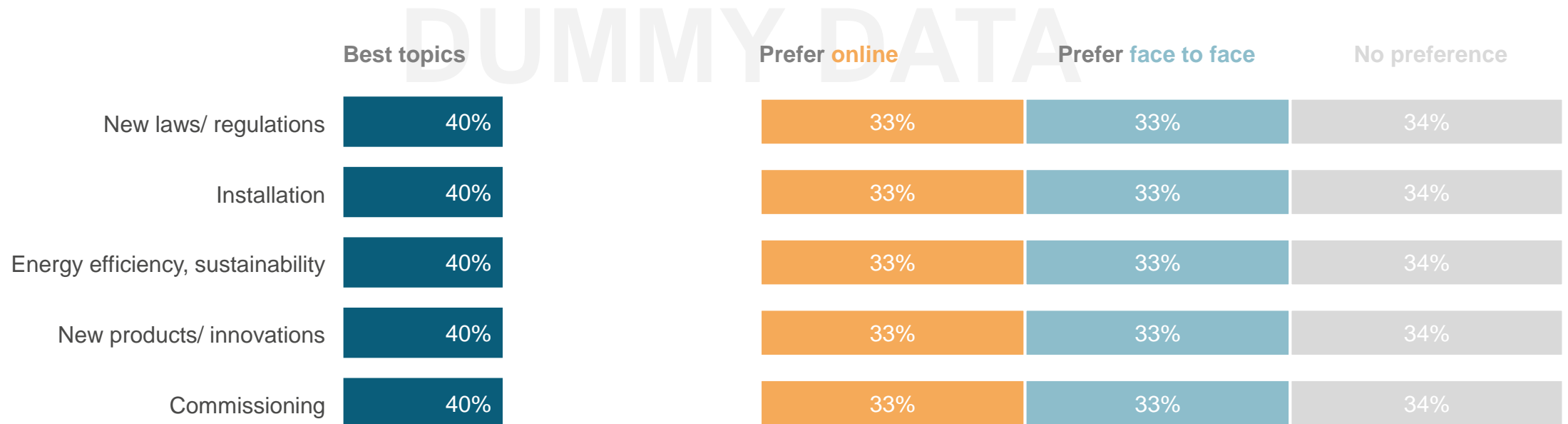
DUMMY DATA

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Best topics and preferred methods for trainings – Top 5

Q: What would be the best topics for training for you and/ or the people in your company to increase the level of knowledge?

Q: For which of those topics would your company prefer to have online/ digital training and for which face-to-face training?



Base: n=, if attending trainings or – if not yet – expect to do so in future

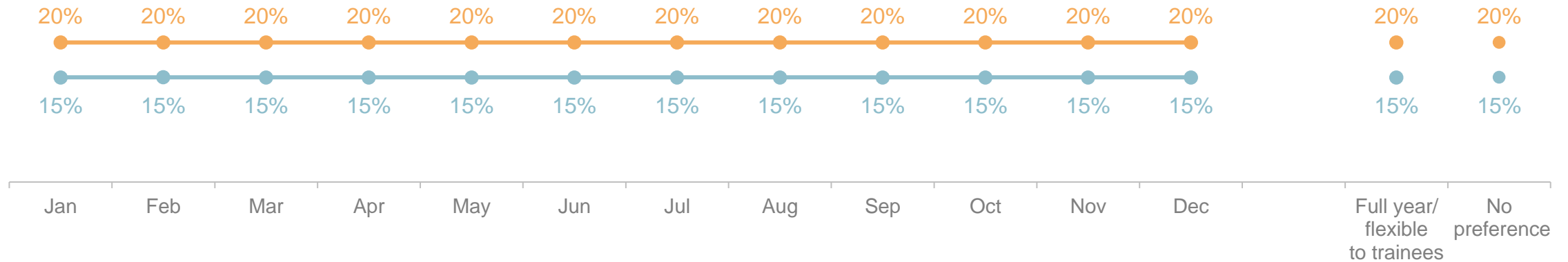
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Best time of the year for trainings

Q: What is the best time of the year when you would prefer online/ face-to-face trainings to be organised?

Online | Face to face

DUMMY DATA



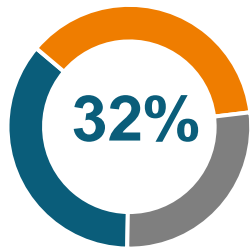
Base: n= , if attending trainings or – if not yet – expect to do so in future

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Interest in becoming a certified manufacturer's installer

Q: When a manufacturer is organising the training, would you be interested to become a certified installer of this manufacturer as part of a comprehensive modular training program?

Yes | Depends on the topic | No / don't know



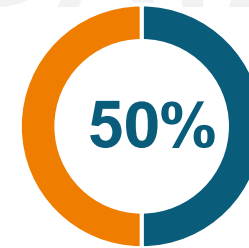
By FTE (% Yes)

1-4 FTE	5-14 FTE	15+ FTE
33%	33%	33%

Willingness to invest 2 training days to get a certification

Q: Would you be willing to invest 2 days of training per employee for one training program in order to get a certification?

Yes | No / don't know



By FTE (% Yes)

1-4 FTE	5-14 FTE	15+ FTE
50%	50%	50%

DUMMY DATA

Change of interest in installing manufacturers products

Q: If you attend special training provided by a manufacturer, do you then usually use/install his products in the future...?

Switch to this manufacturer completely | More often | With the same frequency as before | Don't know



Base: n=, if attending trainings or – if not yet – expect to do so in future

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Experience of the labour shortage

Q: Does your company experience a shortage of labour (professional electrical installers) in your own work practice?

Yes | No | Don't know



Base: n=125, all

Expectation of the labour shortage

Q: Do you expect to be confronted with a shortage of labour in your practice in the coming five years?

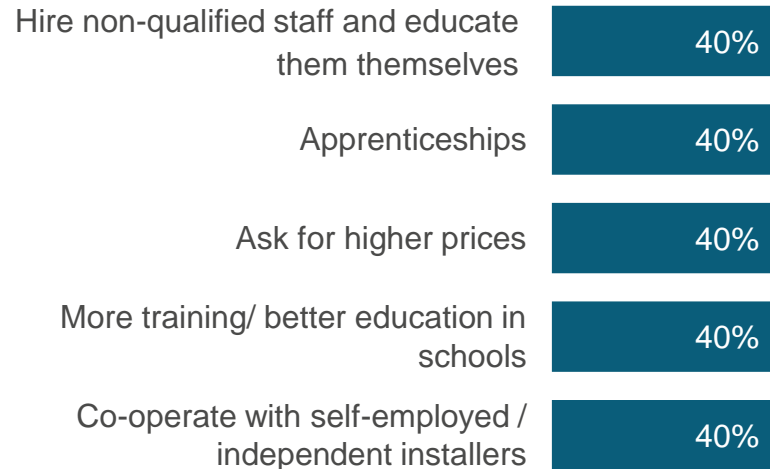
Yes | No | Don't know



Base: n=125, all

Dealing with the labour shortage - Top 5

Q: What do you expect electrical installers will do to deal with the labour shortage in the coming years?



Base: n=, all who expect labour shortage

Focus of manufacturers and suppliers in installation industry

Q: To what extent do you agree that manufacturers and suppliers to the installation industry should focus more on ...?

(STRONGLY) AGREE | NEUTRAL | (STRONGLY) DISAGREE

More installation support for specific tasks



Trainings for installers on their products



More plug & play or quick installation solutions for their products



Base: n=, all

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Respondents' background characteristics

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Job title of the interviewed respondents and the company size

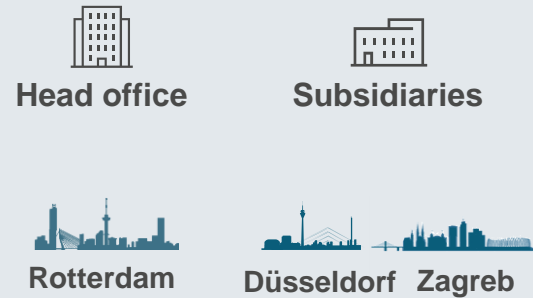
Q: What is your position within the company?

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%
Purchaser	50%	50%	50%	50%	50%	50%	50%
Project manager	50%	50%	50%	50%	50%	50%	50%
Installer	50%	50%	50%	50%	50%	50%	50%
Engineer / designer	50%	50%	50%	50%	50%	50%	50%
Calculator / work planner	50%	50%	50%	50%	50%	50%	50%
Sales	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%

About USP

USP Marketing Consultancy



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**



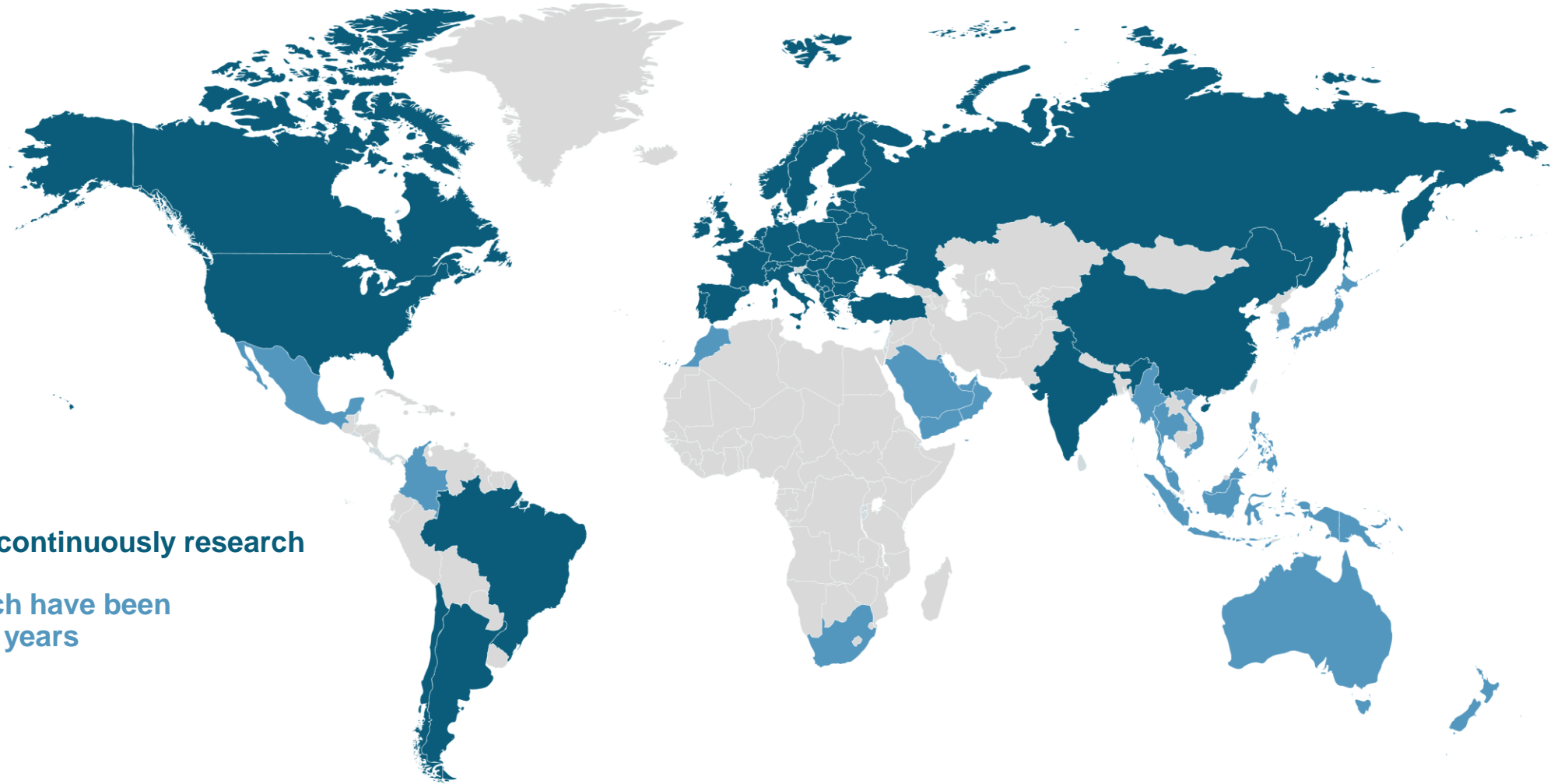
Dedicated market research

- 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

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