

Service

European mechanical installation monitor Q2 2023

Services in the installation market

August 2023

This Contract is made and entered into by and between the Customer and the Supplier, hereinafter referred to as the "CUSTOMER", and the "SUPPLIER."

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Key takeaways

Profile of the Mechanical installer

Business development

Theme topic – Services in the installation market

Cross-country summary

United Kingdom

Germany

France

Poland

Belgium

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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:

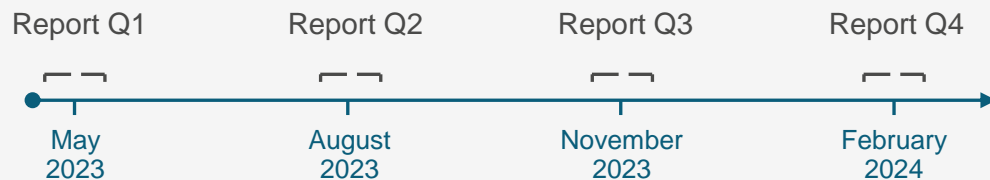
Q1: Sustainability

Q2: Services in the installation market

Q3: Purchase channels

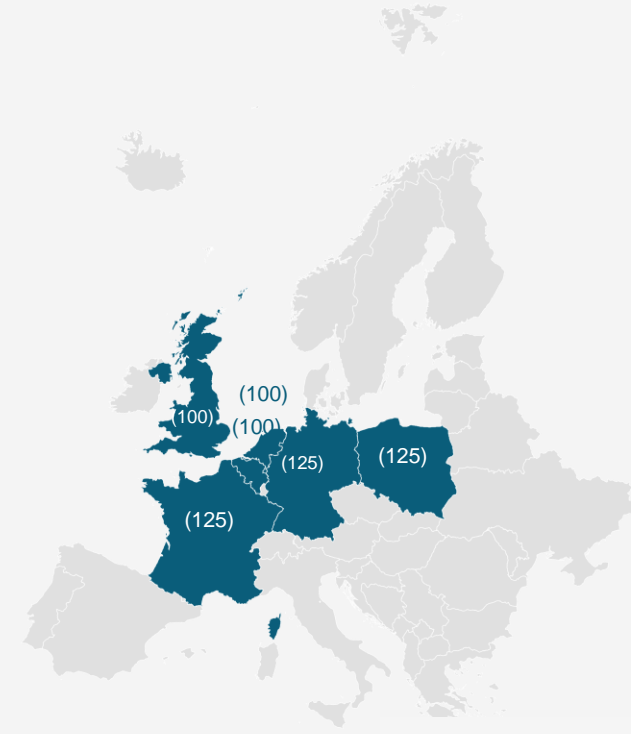
Q4: Training needs

THE TIMELINE



COUNTRY SCOPE

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

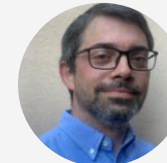


PROJECT TEAM



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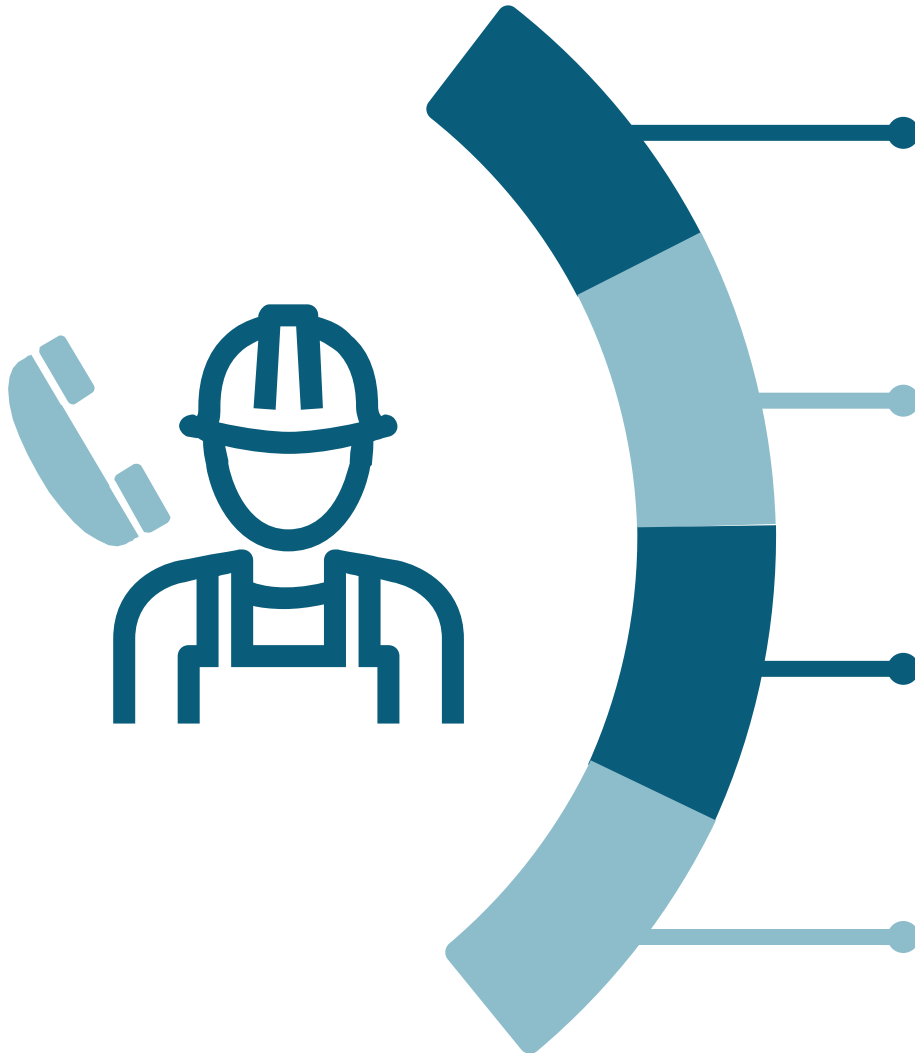
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About target group & methodology



Surveying 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

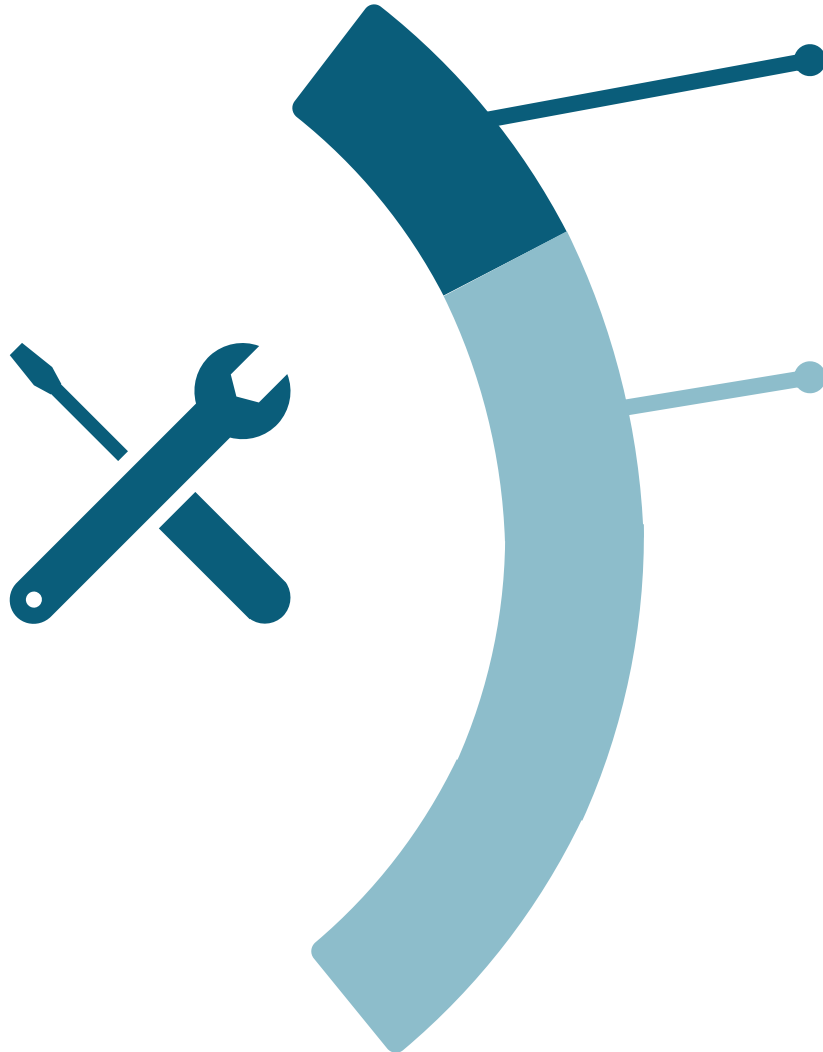
Phone surveys are the best approach for obtaining a sufficient number of interviews, in order to provide insights which can be relied on. These phone interviews are conducted by fixed fieldwork partners, located in the respective countries.

... 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 Q2 theme topic



Surveying the Services in the installation sector...

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

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

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

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

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Key takeaways

1

Business Development

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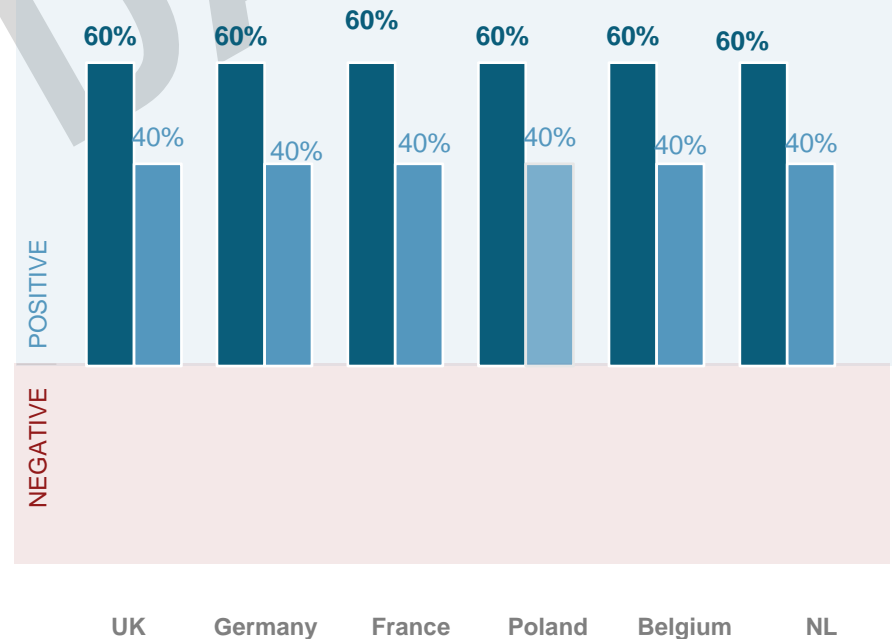
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Turnover balance of installers Q2 2023 and Q3 2023

Balance of companies that **see/expect** an increase minus decrease in turnover in **Q2 2023/Q3 2023** in comparison to the turnover for **Q2 2022/Q3 2023**



Key takeaways

2

Theme: Services in the installation sector

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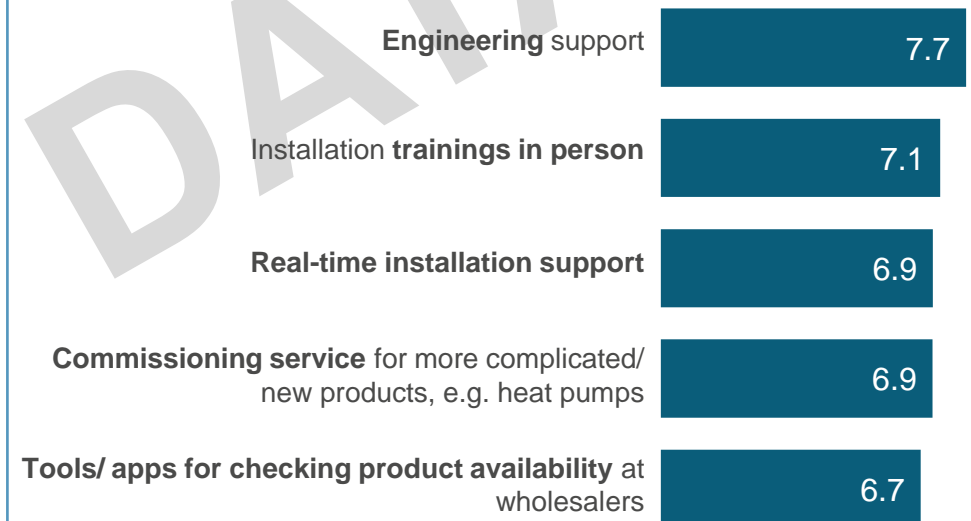
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Top 5 services installers want to receive from manufacturers



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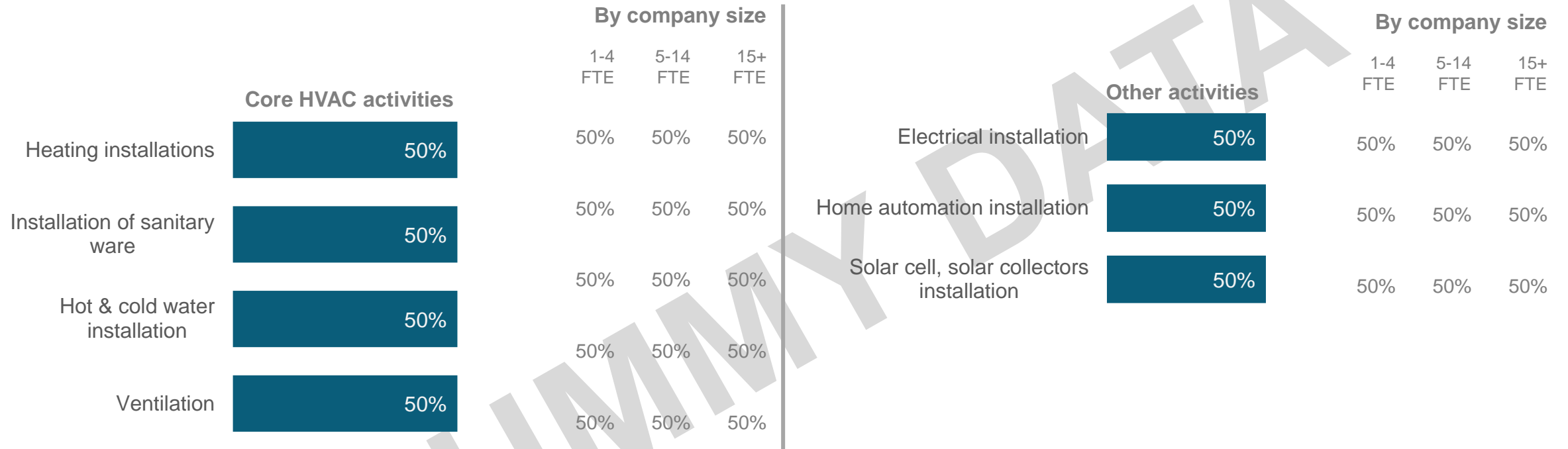
Core HVAC activities

Which of the following installation activities does your company perform?

	UK	Germany	France	Poland	Belgium	Netherlands
<i>Sample size</i>	100	125	125	125	100	100
Heating installations	50%	50%	50%	50%	50%	50%
Hot & cold water installation	50%	50%	50%	50%	50%	50%
Installation of sanitary ware	50%	50%	50%	50%	50%	50%
Heat pumps	50%	50%	50%	50%	50%	50%
Ventilation	50%	50%	50%	50%	50%	50%
Air conditioning and cooling	50%	50%	50%	50%	50%	50%

Other installation activities

	UK	Germany	France	Poland	Belgium	Netherlands
<i>Sample size</i>	100	125	125	125	100	100
Solar cells, solar collectors	50%	50%	50%	50%	50%	50%
Electrical installation	50%	50%	50%	50%	50%	50%
Home automation installation	50%	50%	50%	50%	50%	50%



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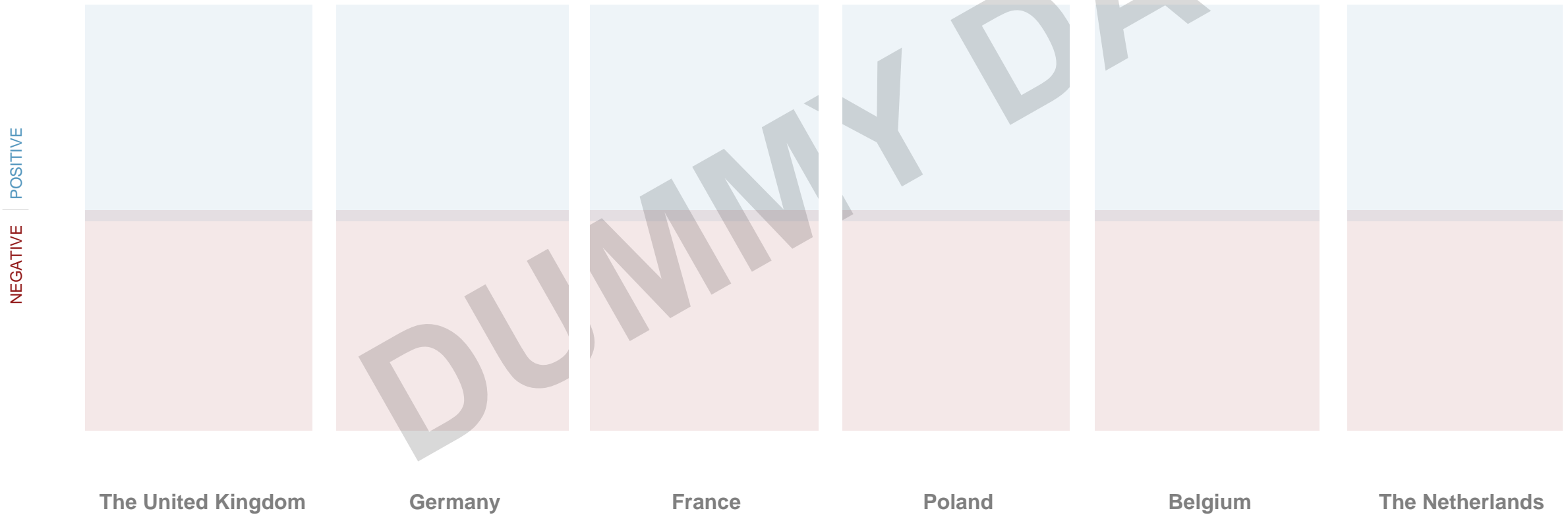
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Turnover outlook last quarters and expectations for Q2 2023

TURNOVER BALANCE

(% INCREASE minus % DECREASE)

— COMPARISON SAME QUARTER LAST YEAR

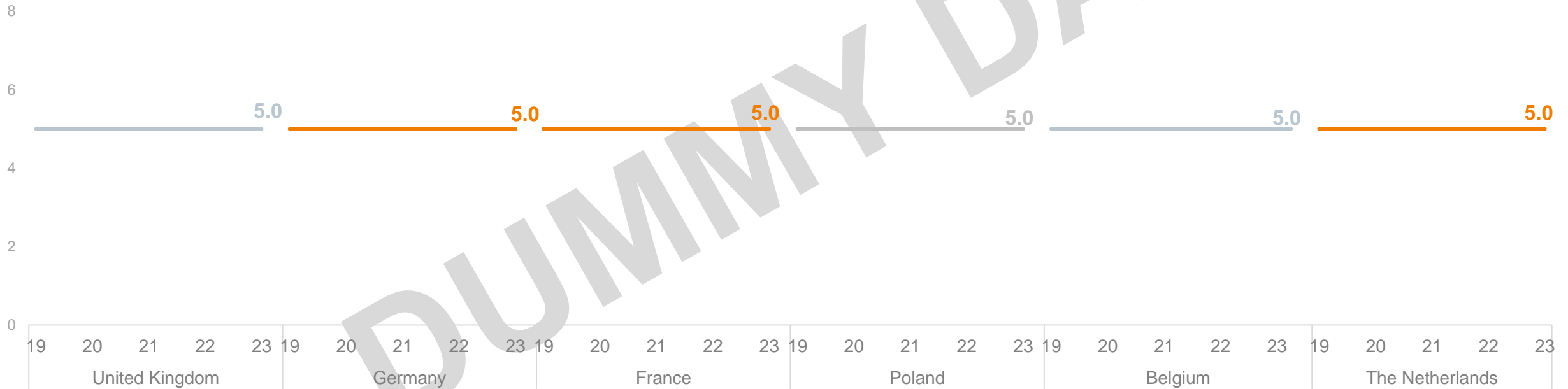


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Order book portfolio

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

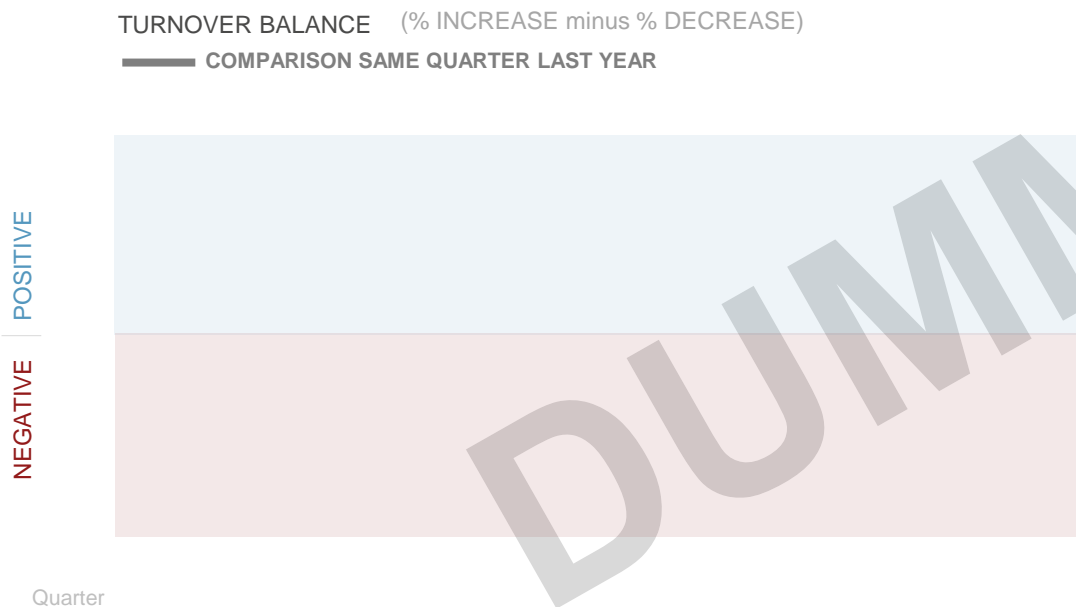
(MONTHS)



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Turnover outlook

*If you compare your turnover of Q2-23 to Q2-22, how did your turnover develop?
What are your expectations for the development in Q3-23?*



Order book portfolio

How big is your current order book portfolio?

ORDER BOOK (MONTHS)
EU | THE UNITED KINGDOM

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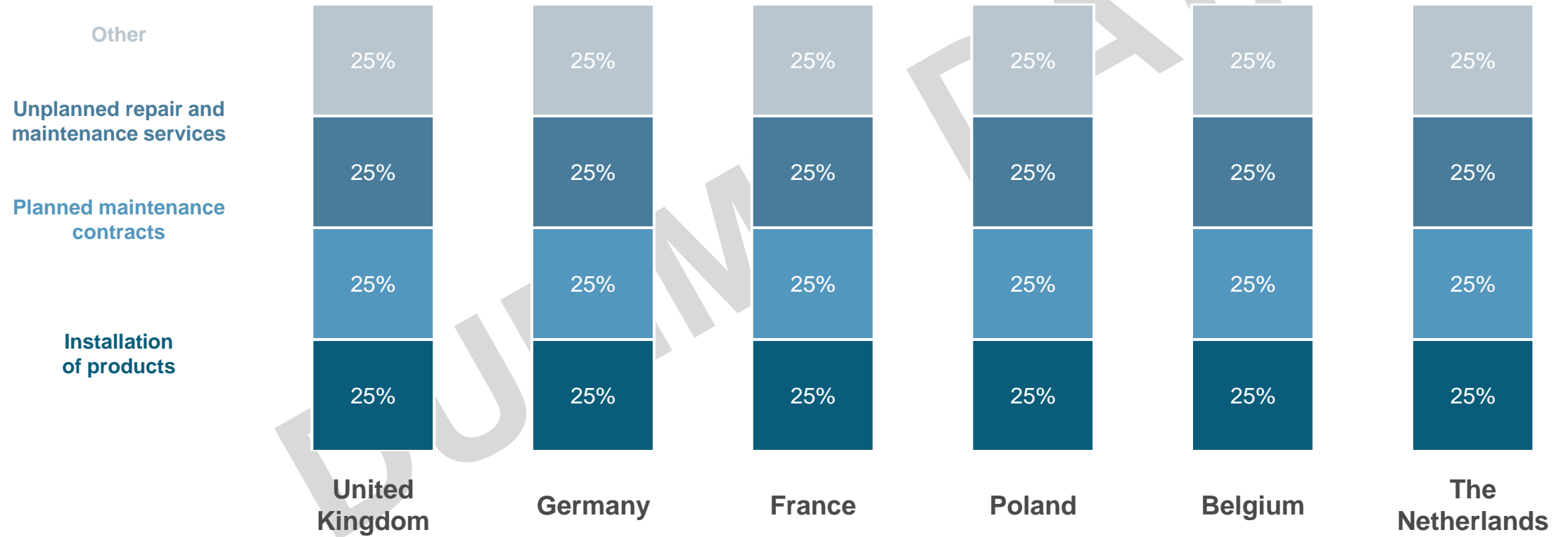
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Services offered as share of turnover

What share of your total turnover comes from...



European installers offer a variety of services to their customers.

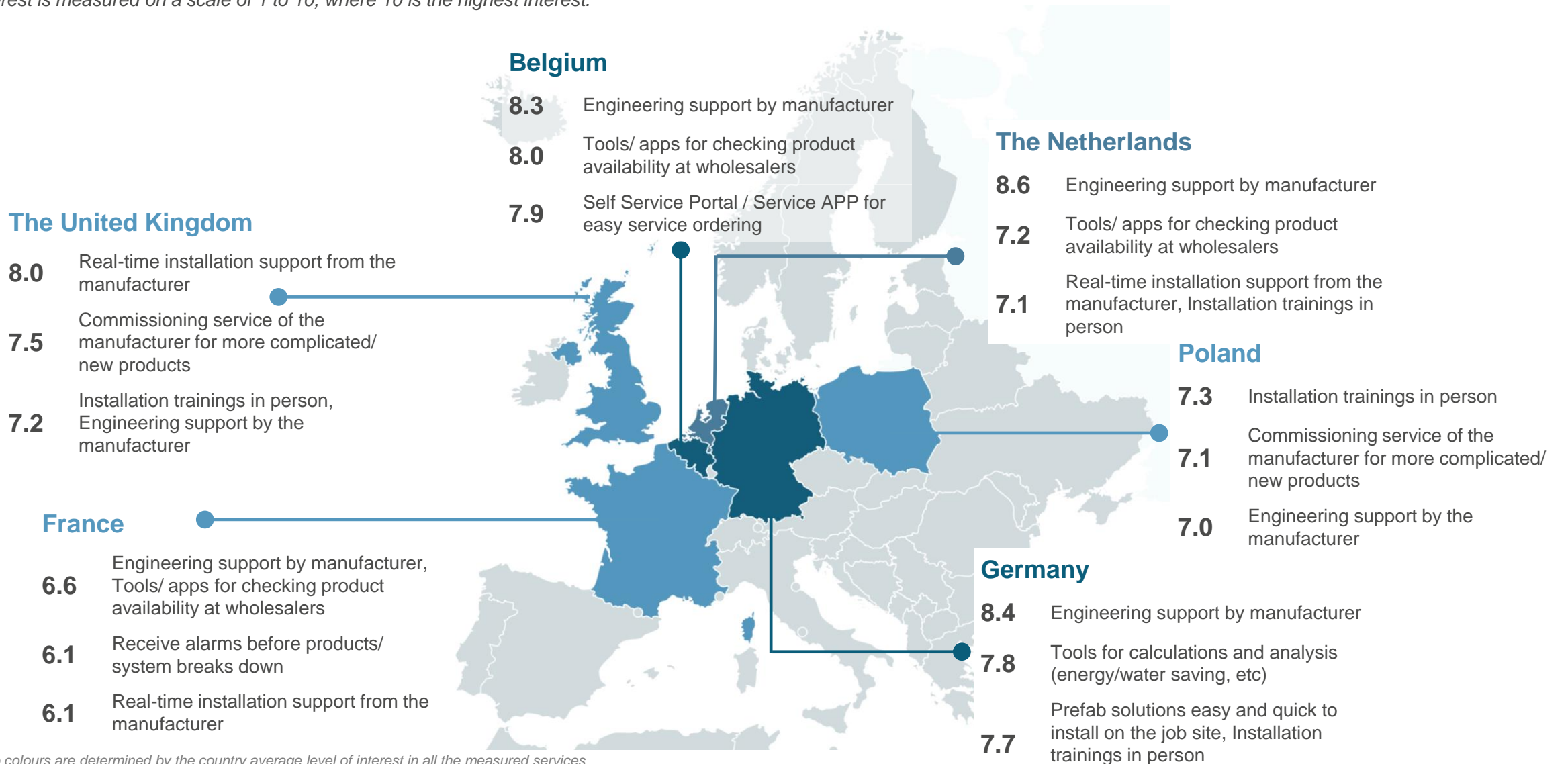
Services offered to clients

(% of installers offering the services)

		United Kingdom	Germany	France	Poland	Belgium	The Netherlands
		2023 [vs. 2021]	2023 [vs. 2021]	2023 [vs. 2021]	2023 [vs. 2021]	2023 [vs. 2021]	2023 [vs. 2021]
Advice services	Design and engineering of systems	25% ▲	25% ▼	25% ▼	25% ●	25% ▲	25% ▲
	Advice on building automation/ smart buildings	25% ▲	25% ▼	25% ▼	25% ●	25% ▲	25% ▲
	Advice on energy and cost saving	25% ▲	25% ▼	25% ▼	25% ●	25% ▲	25% ▲
		25% ▲	25% ▼	25% ▼	25% ●	25% ▲	25% ▲
Maintenance and repair	Planned maintenance services/ contracts	25% ▲	25% ▼	25% ▼	25% ●	25% ▲	25% ▲
	Advice on maintenance of system	25% ▲	25% ▼	25% ▼	25% ●	25% ▲	25% ▲
	Unplanned repair and maintenance	25% ▲	25% ▼	25% ▼	25% ●	25% ▲	25% ▲
	Remote monitoring/ troubleshooting	25% ▲	25% ▼	25% ▼	25% ●	25% ▲	25% ▲
Product services	Services during the warranty period	25% ▲	25% ▼	25% ▼	25% ●	25% ▲	25% ▲
	Inspections and safety checks	25% ▲	25% ▼	25% ▼	25% ●	25% ▲	25% ▲
	Offering products for client lease	25% ▲	25% ▼	25% ▼	25% ●	25% ▲	25% ▲

Installers are most interested in these services offered by manufacturers:

Interest is measured on a scale of 1 to 10, where 10 is the highest interest.



*Map colours are determined by the country average level of interest in all the measured services

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Interest in services offered by manufacturers

Interest is measured on a scale of 1 to 10.

		United Kingdom	Germany	France	Poland	Belgium	The Netherlands
Speed and ease Onsite	Engineering support by the manufacturer	7.0	7.0	7.0	7.0	7.0	7.0
	Real-time installation support by manufacturer	7.0	7.0	7.0	7.0	7.0	7.0
	Commissioning service for more complicated/ new products,	7.0	7.0	7.0	7.0	7.0	7.0
	Digital tools for easier commissioning /installation of products	7.0	7.0	7.0	7.0	7.0	7.0
	24 hours maintenance and support service	7.0	7.0	7.0	7.0	7.0	7.0
	Prefab solutions	7.0	7.0	7.0	7.0	7.0	7.0
Speed and ease Offsite	Installation trainings in person	7.0	7.0	7.0	7.0	7.0	7.0
	Tools/ apps for checking product availability at wholesalers	7.0	7.0	7.0	7.0	7.0	7.0
	Digital tools/ apps for remote product/ system troubleshooting	7.0	7.0	7.0	7.0	7.0	7.0
	Receive alarms <i>after</i> products/ system breaks down	7.0	7.0	7.0	7.0	7.0	7.0
	Self Service Portal / Service APP for easy service ordering	7.0	7.0	7.0	7.0	7.0	7.0
	Tools for easy and quick preparation of the offers for clients	7.0	7.0	7.0	7.0	7.0	7.0
	Videos/ tutorials for installation trainings	7.0	7.0	7.0	7.0	7.0	7.0
	Digital tools for remote product/system controlling/monitoring	7.0	7.0	7.0	7.0	7.0	7.0
Connected products for remote monitoring /servicing	7.0	7.0	7.0	7.0	7.0	7.0	

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Interest in services offered by manufacturers

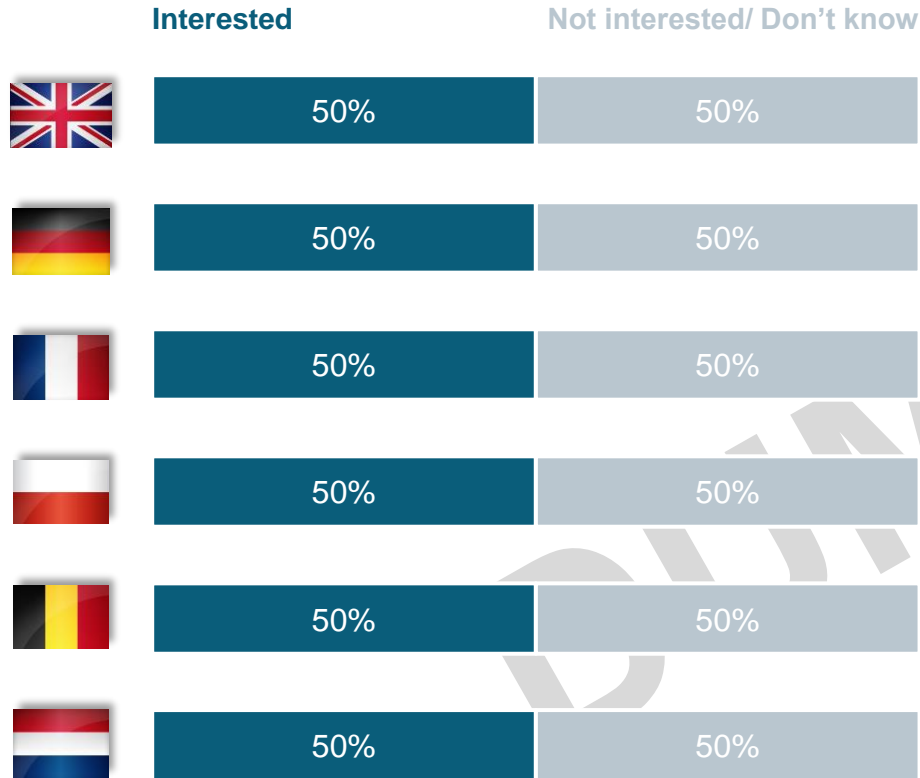
Interest is measured on a scale of 1 to 10.

		United Kingdom	Germany	France	Poland	Belgium	The Netherlands
Failure cost and quality	Tools for calculations and analysis	7.0	7.0	7.0	7.0	7.0	7.0
	Receive alarms <i>before</i> products/ system breaks down	7.0	7.0	7.0	7.0	7.0	7.0
	Tools for dimensioning/ making product choice	7.0	7.0	7.0	7.0	7.0	7.0
	BIM Support	7.0	7.0	7.0	7.0	7.0	7.0
Business	Getting assignments for installation only	7.0	7.0	7.0	7.0	7.0	7.0
	Receiving sales leads	7.0	7.0	7.0	7.0	7.0	7.0
	Give maintenance jobs to manufacturers if fully booked	7.0	7.0	7.0	7.0	7.0	7.0
	Tools that help with online marketing activities	7.0	7.0	7.0	7.0	7.0	7.0
	Offer to subcontract a part of the installation	7.0	7.0	7.0	7.0	7.0	7.0
	Offering leasing of tools	7.0	7.0	7.0	7.0	7.0	7.0
	Offering products clients can lease instead of buy	7.0	7.0	7.0	7.0	7.0	7.0

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Interest in personal contact with the manufacturers

Are you interested in having the possibility of personal contact with the manufacturers via a hotline?



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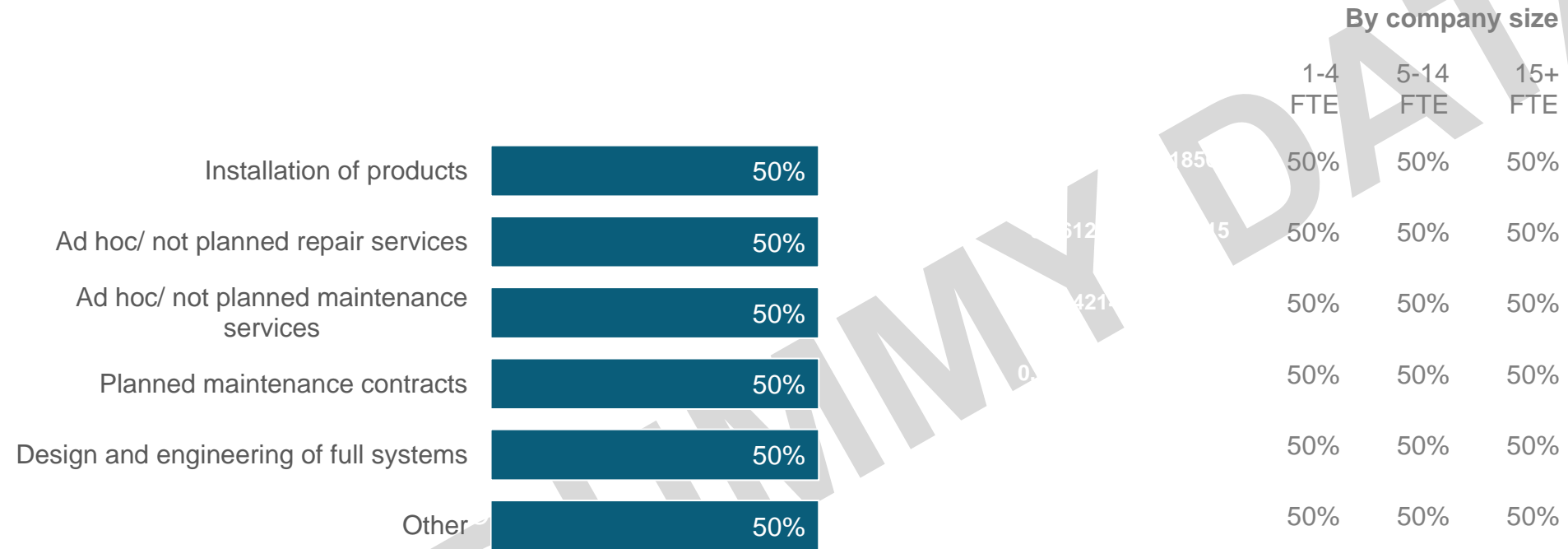
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Services offered as share of turnover

What share of your total turnover comes from...

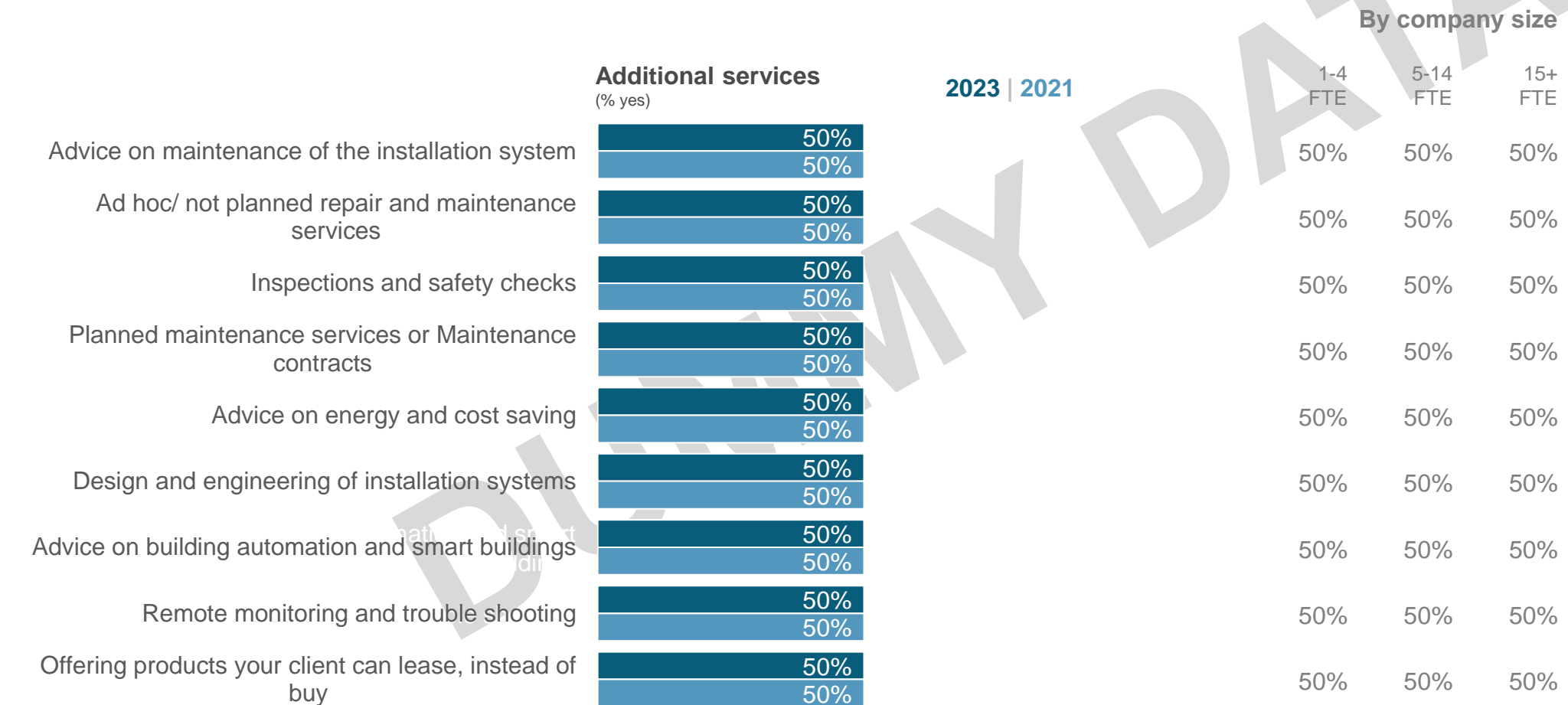


Base: n=100, all installers

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Additional services offered by installers

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

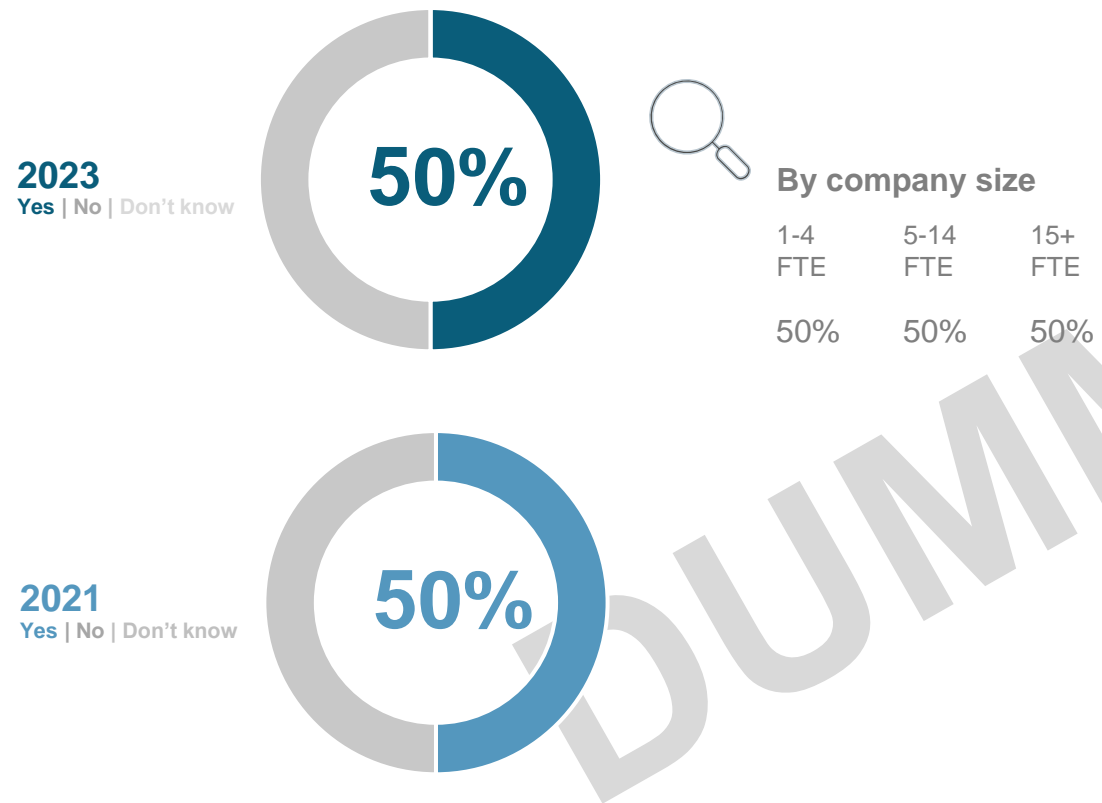


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Services during the warranty period

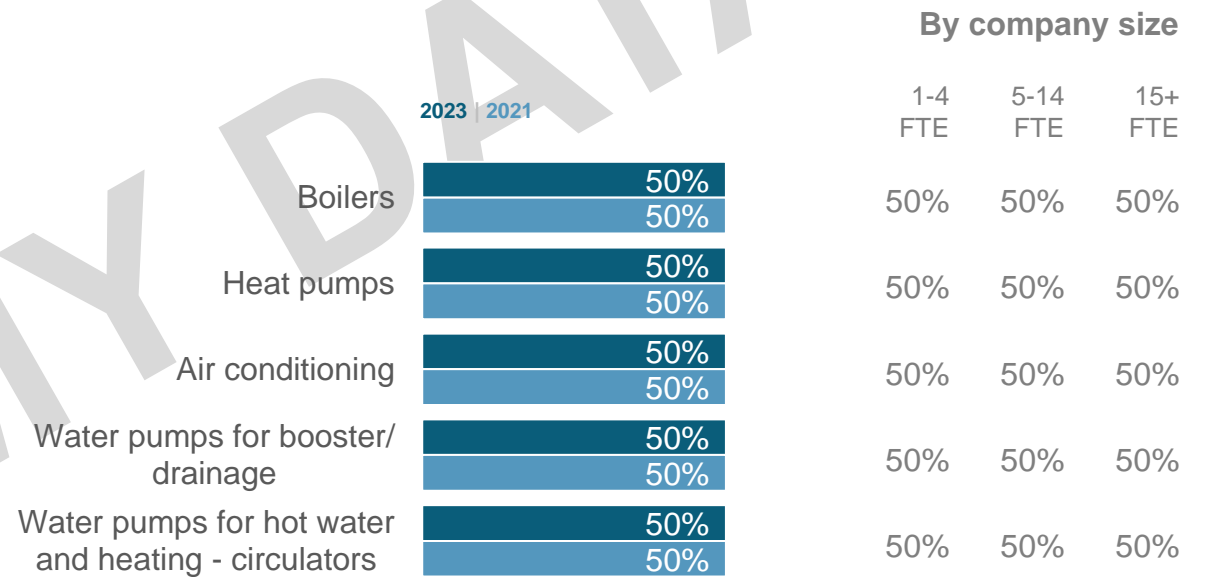
Do you perform repair and maintenance services during the warranty period?



Base: n=100, all installers

Warranty services for specific products – Top 5

For which products do you perform repair and maintenance services during the warranty period?



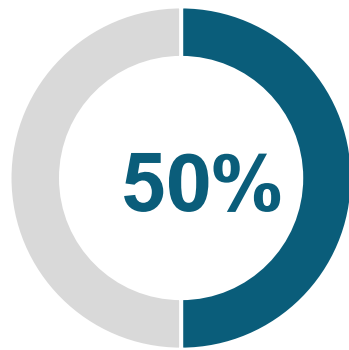
Base: n=83, if repair and maintenance services are performed during the warranty period

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Share of installers with planned maintenance contracts

% companies with planned maintenance contracts

2023
Yes | No

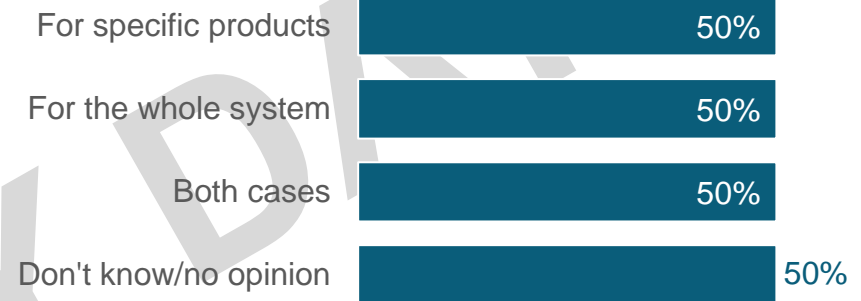


By company size

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

Maintenance services for specific products of whole system

Are the maintenance/ service contracts you offer for a specific product or for the whole system?



Base: n=76, if installers offer planned maintenance contracts

Maintenance services for specific products

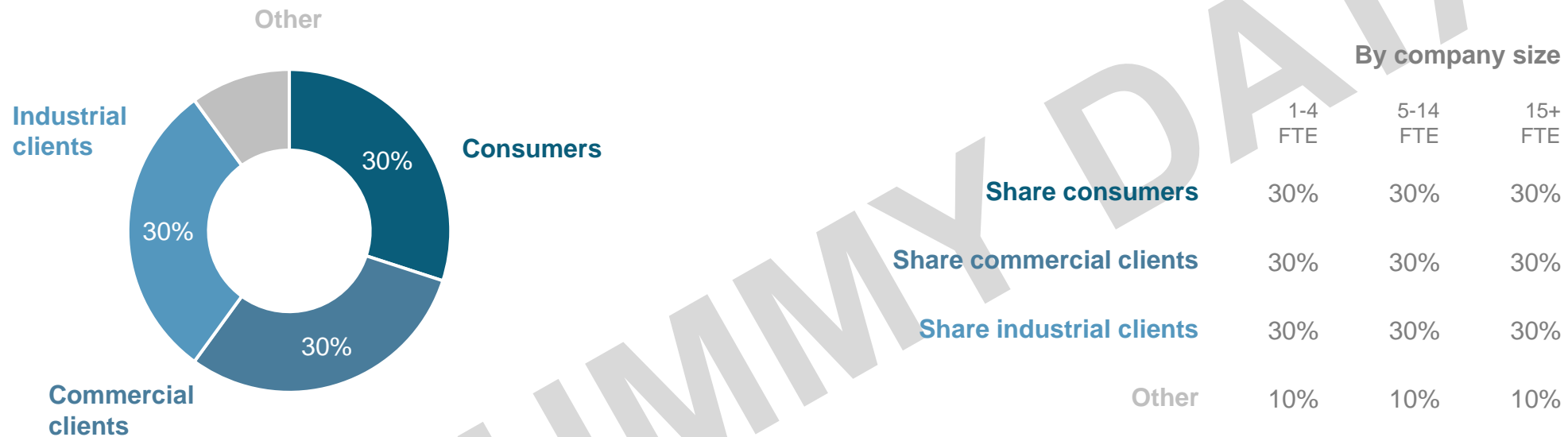
For what specific products do you offer planned maintenance services/ Maintenance contracts/ service contracts?

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Customers served by planned maintenance contracts

What share of your planned maintenance contracts are for consumers, what share is for commercial, and what share for industrial clients?



Base: n=26, if having turnover from planned maintenance contracts

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Services from manufacturers

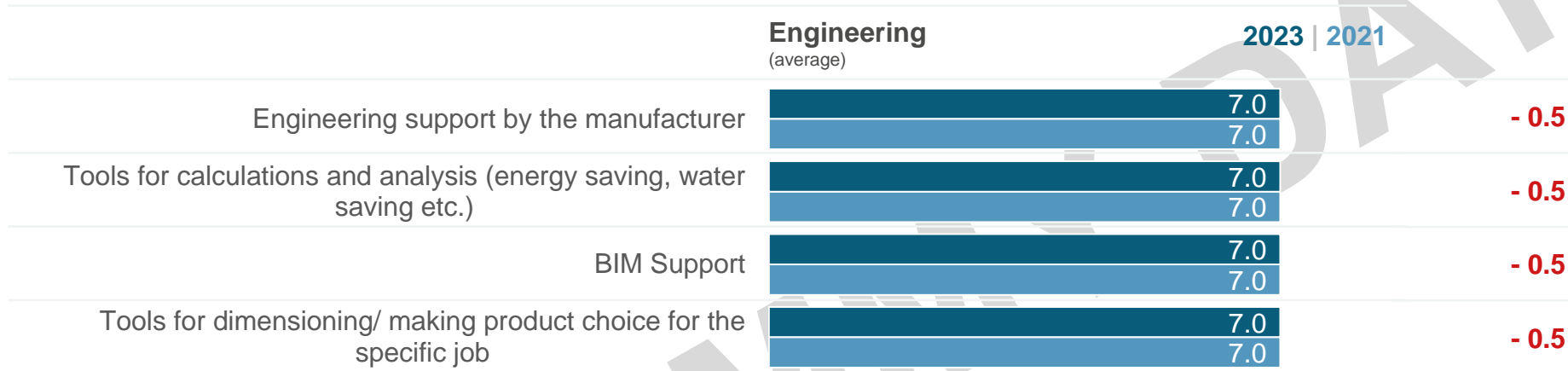
How interesting are the following services to receive from manufacturers of installation products on a scale of 1 to 10, where 10 is the most interesting?



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Services from manufacturers

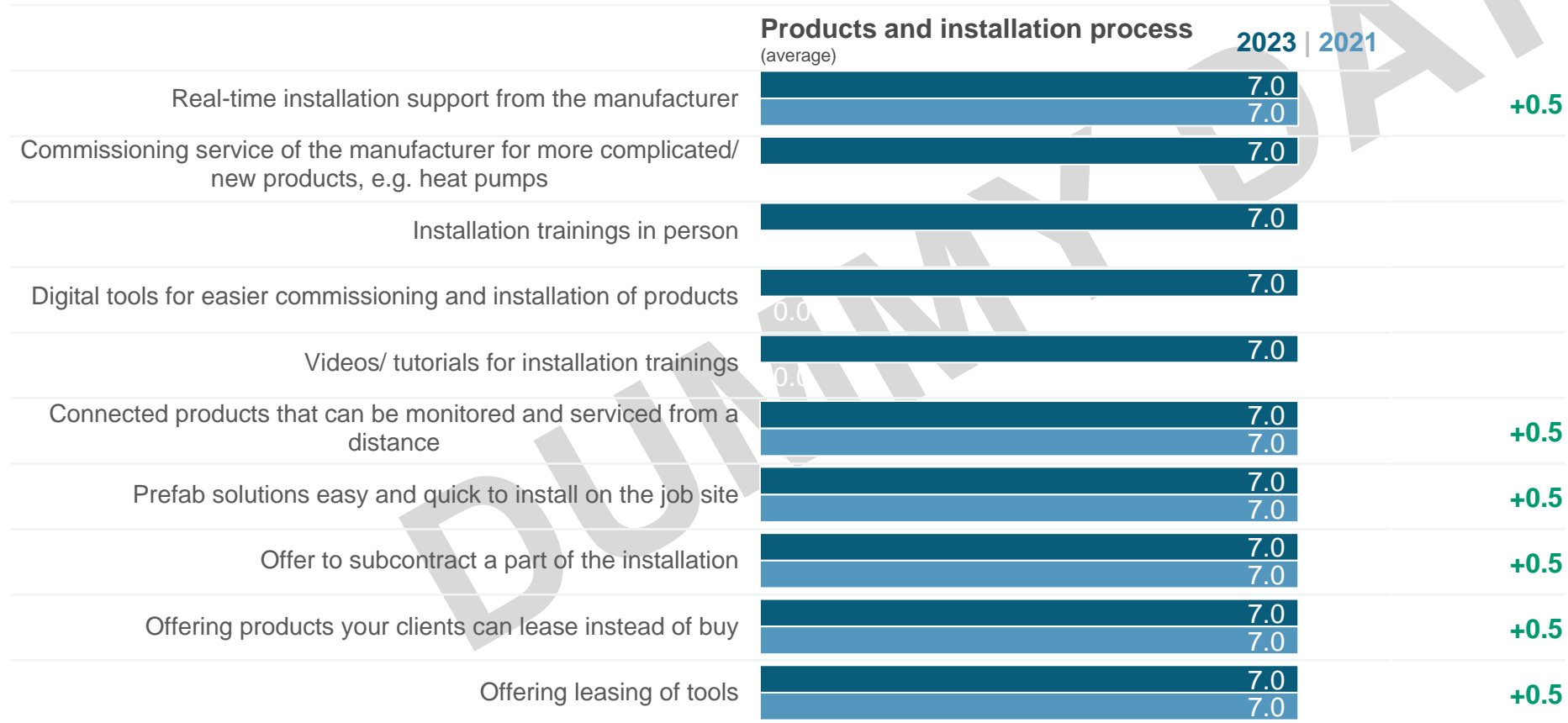
How interesting are the following services to receive from manufacturers of installation products on a scale of 1 to 10, where 10 is the most interesting?



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Services from manufacturers

How interesting are the following services to receive from manufacturers of installation products on a scale of 1 to 10, where 10 is the most interesting?

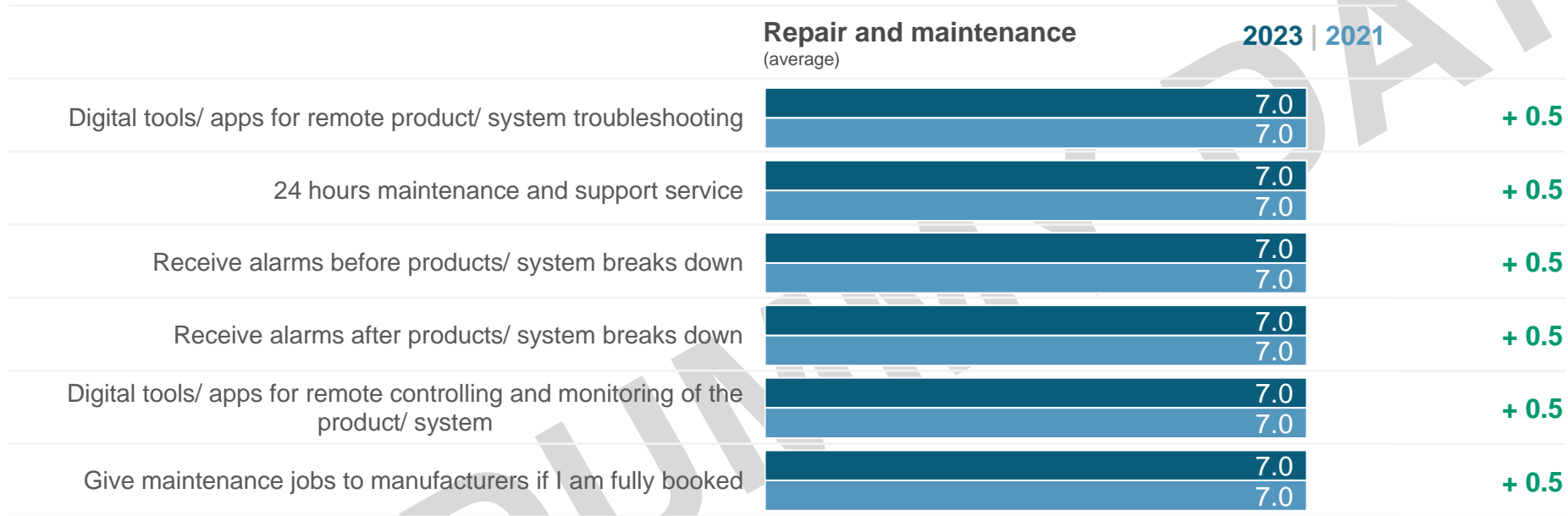


Base: n=100, all installers

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Services from manufacturers

How interesting are the following services to receive from manufacturers of installation products on a scale of 1 to 10, where 10 is the most interesting?



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Services from tool supplier

Which service(s) do you expect from your tool supplier?

		By company size		
		1-4 FTE	5-14 FTE	15+ FTE
Replacement tool when tool is serviced/ repaired	50%	50%	50%	50%
Good quality repair service	50%	50%	50%	50%
Warranty and warranty information	50%	50%	50%	50%
Calibration services	50%	50%	50%	50%
Customer service	50%	50%	50%	50%
Service/ repair of tool within 24 hours	50%	50%	50%	50%
Stock availability	50%	50%	50%	50%
Option to have extended warranty	50%	50%	50%	50%
Tutorials/ training in-person about tools	50%	50%	50%	50%
Good (quick) delivery	50%	50%	50%	50%
Information on updates and new tools	50%	50%	50%	50%
Online tutorials	50%	50%	50%	50%
Reasonable prices	50%	50%	50%	50%
Other	50%	50%	50%	50%
Don't know/no opinion	50%	50%	50%	50%

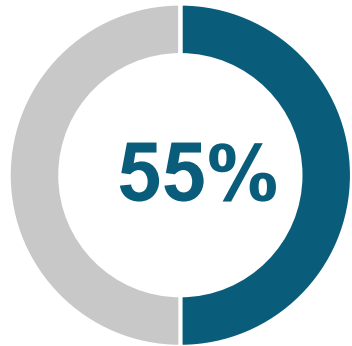
Base: n=100, all installers

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Interest in personal contact with the manufacturers

Are you interested in having the possibility for personal contact with the manufacturers via a hotline?

50% of UK installers are interested in contacting manufacturers via a hotline



2023

Yes | No | Don't know

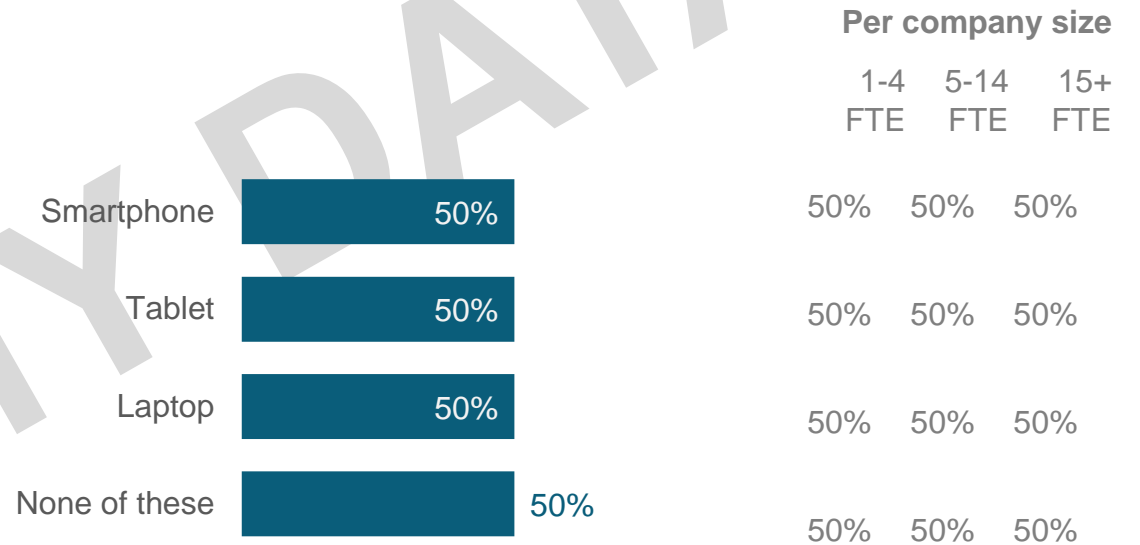
Base: n=100, all installers

By company size

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

Usage of electronic communication devices

Do your employees have laptop, tablet or smartphone at the installation site?



Base: n=100, all installers

Index

About European Mechanical Installation Monitor

Key takeaways

Profile of the Mechanical installer

Business development

Theme topic – Services in the installation market

Cross-country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

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
Owner / Director/ Manager	92%	30%	58%	94%	68%	74%
Plumber/ installer		39%		0%	3%	1%
Calculator			26%	2%	9%	2%
Project manager	1%	18%	6%	1%	7%	4%
Engineer/designer		3%	6%	2%	3%	3%
Buyer/purchaser		6%	2%	2%	3%	1%
Senior buyer/purchaser		2%	2%		1%	
Other	7%				6%	15%
1 - 4 FTE	52%	27%	46%	43%	51%	44%
5 - 14 FTE	33%	40%	34%	36%	21%	27%
15+ FTE	15%	33%	20%	21%	28%	29%

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

- Handshake
- Magnifying glass
- Line graph
- Document with checkmark

Revenue distribution



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**



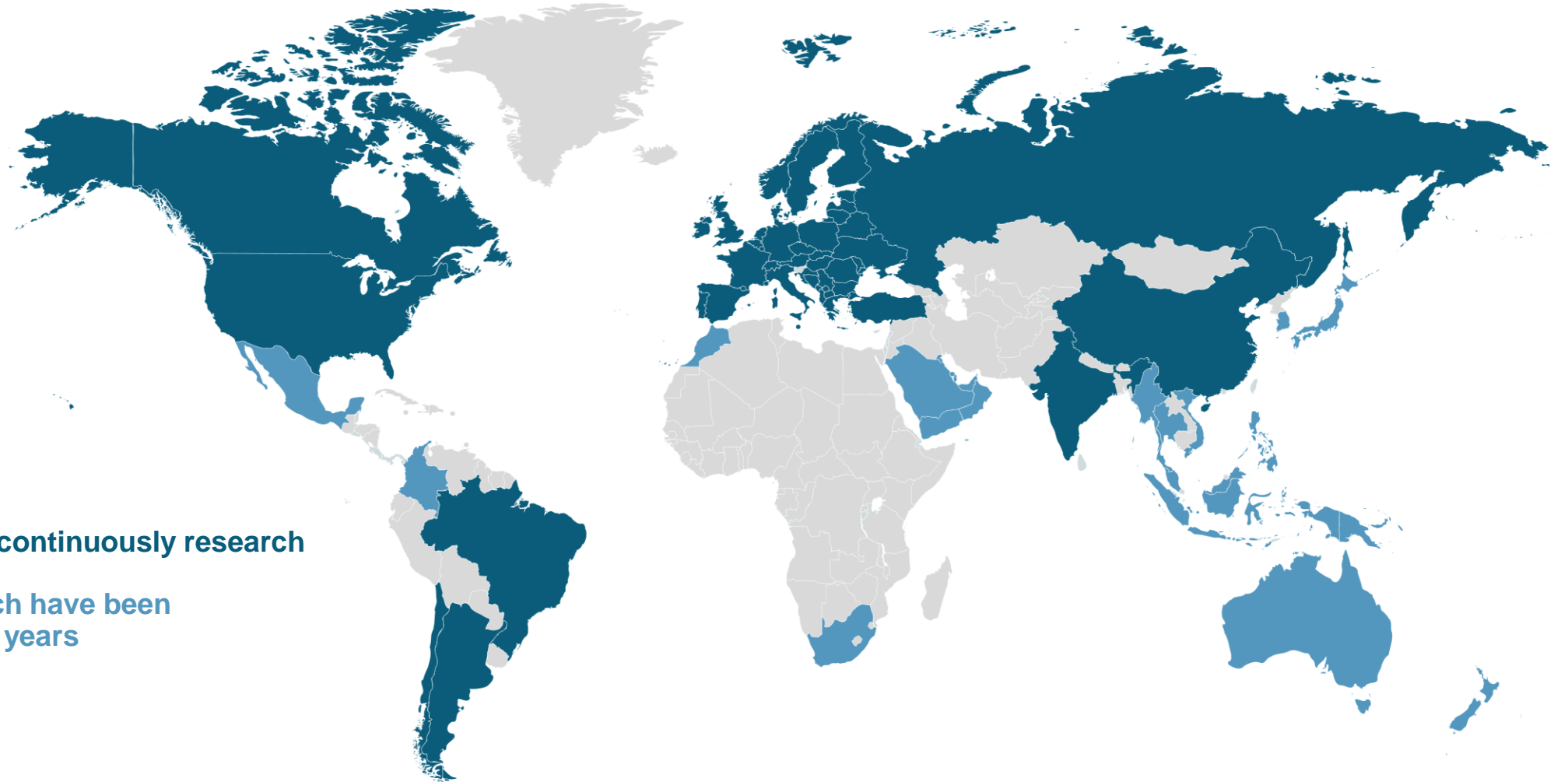
Dedicated market research

- 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 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.

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	<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 	
Way of reporting	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly	Annually
2023 Theme topics	<ul style="list-style-type: none"> • Q1: Media orientation • Q2: BIM • Q3: Prefab • Q4: Sustainability 	<ul style="list-style-type: none"> • H1: Purchase channels • H2: Sustainability 	<ul style="list-style-type: none"> • Q1: Sustainability • Q2: Services • Q3: Purchase channels • Q4: Training needs 	<ul style="list-style-type: none"> • Q1: Media orientation • Q2: Training needs • Q3: BIM • Q4: Purchase channels 	<ul style="list-style-type: none"> • Trend tracking • Brand funnels • Purchase channels 	<ul style="list-style-type: none"> • Q1: Orientation; sustainability • Q2: Purchase Channels; online performance of DIY stores • Q3: Branding; private labels • Q4: DIY vs DIFM; plans for 2024 	<ul style="list-style-type: none"> • 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	
							
							
							
							
							
							
							

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