



European mechanical installation monitor Q4 2022

Media orientation and consumption

February 2023

A product by **USP** Marketing Consultancy

Index

About European Mechanical Installation Monitor

Key takeaways

Profile of the Mechanical installer

Business development

Theme topic – Media orientation and consumption

Cross-country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Appendix



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.

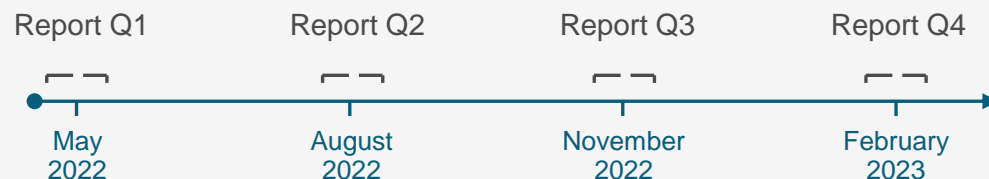
THE RESEARCH TOPICS

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

Quarterly theme topics in 2022:

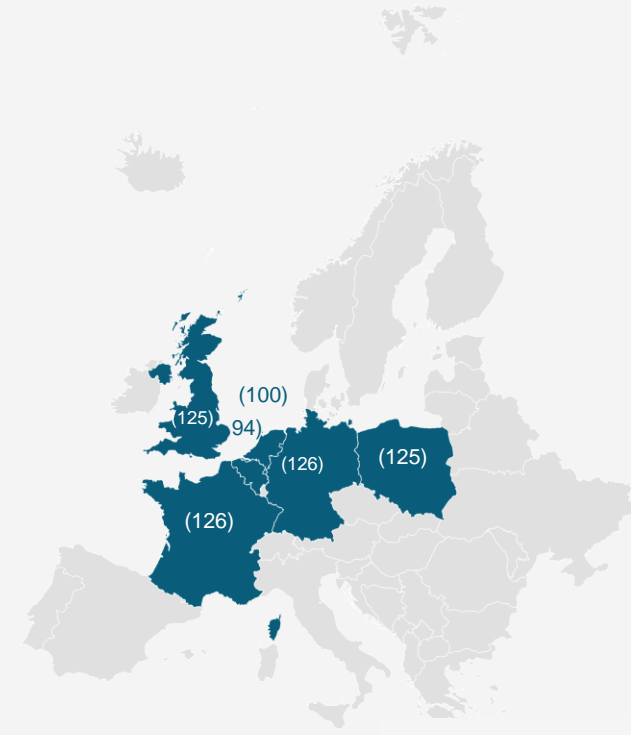
- Q1: BIM
- Q2: Prefab
- Q3: Smart buildings and products
- Q4: Media orientation**

THE TIMELINE



COUNTRY SCOPE

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

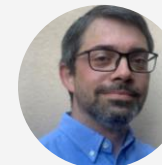


PROJECT TEAM



Ralitsa Ruseva
Consultant Installation
Market

+31 683211709
ruseva@usp-mc.nl



Matija Sinković
Senior Research
Analyst

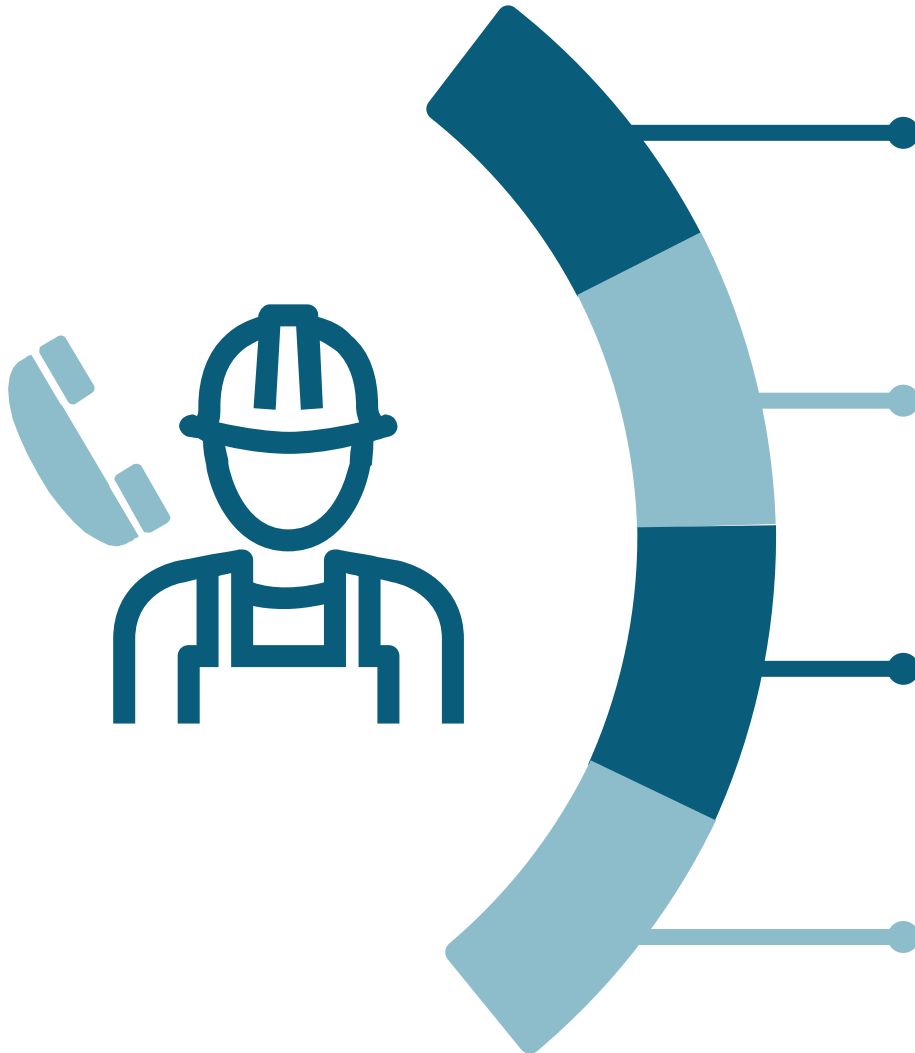
sinkovic@usp-mc.nl



Dirk Hoogenboom
Research consultant

+31 652098924
hoogenboom@usp-mc.nl

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 Q4 theme topic



Surveying media orientation and usage...

This quarter, we investigated the topic of media orientation and usage by asking installers about their usual media orientation behaviour.

Nowadays, with more and more different types of media channels, it is important for manufacturers to know how to reach their clients – the installers. Next to ‘old school’ information sources like magazines, trade shows and representatives, social media channels and apps are gaining ground and have claimed their position in the area of information technology.

In this report, insights will be given about to what extent different types of information sources are used by installers, what kind of information installers are looking for and prefer, the usage of social media and smart phones among installers etc.

...helps manufacturers to fine-tune their marketing campaigns and use the most efficient channels

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

- Different types of information sources used by installers
- What kind of information are installers looking for
- The usage of social media and the different social media channels
- Usage of apps

Index

About European Mechanical Installation Monitor

Key takeaways

Profile of the Mechanical installer

Business development

Theme topic – Media orientation and consumption

Cross-country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Appendix



Key takeaways

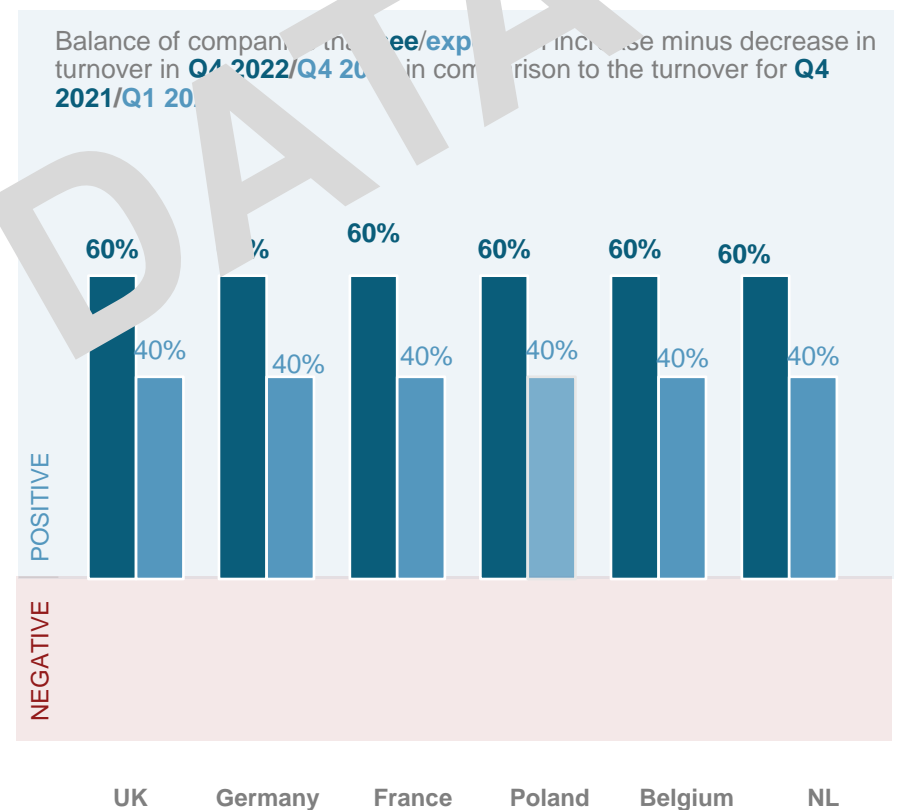
1

Business Development

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis

Turnover balance of installers Q4 2022 and Q1 2023








Key takeaways

2

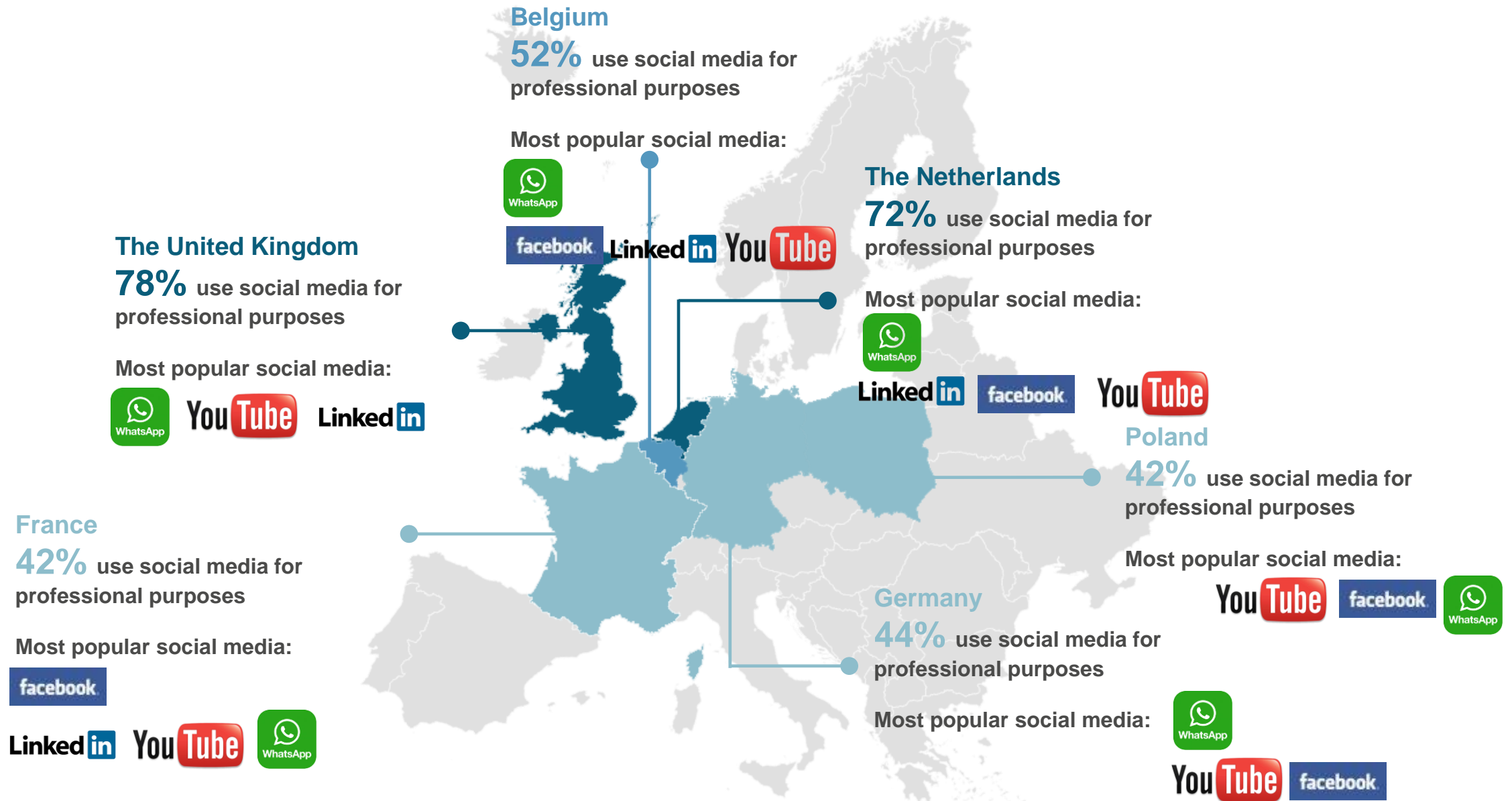
Media Orientation and Consumption

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis

Usage of some Social Media channels for professional purposes

		Germany	France	Poland	Belgium	NL
	60%	60%	60%	60%	60%	60%
	60%	60%	60%	60%	60%	60%
	60%	60%	60%	60%	60%	60%
	60%	60%	60%	60%	60%	60%
	60%	60%	60%	60%	60%	60%
Average number of min/week on social media						
		30	30	30	30	30

Social media usage for professional purposes in the six countries



Index

About European Mechanical Installation Monitor

Key takeaways

Profile of the Mechanical installer

Business development

Theme topic – Media orientation and consumption

Cross-country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Appendix





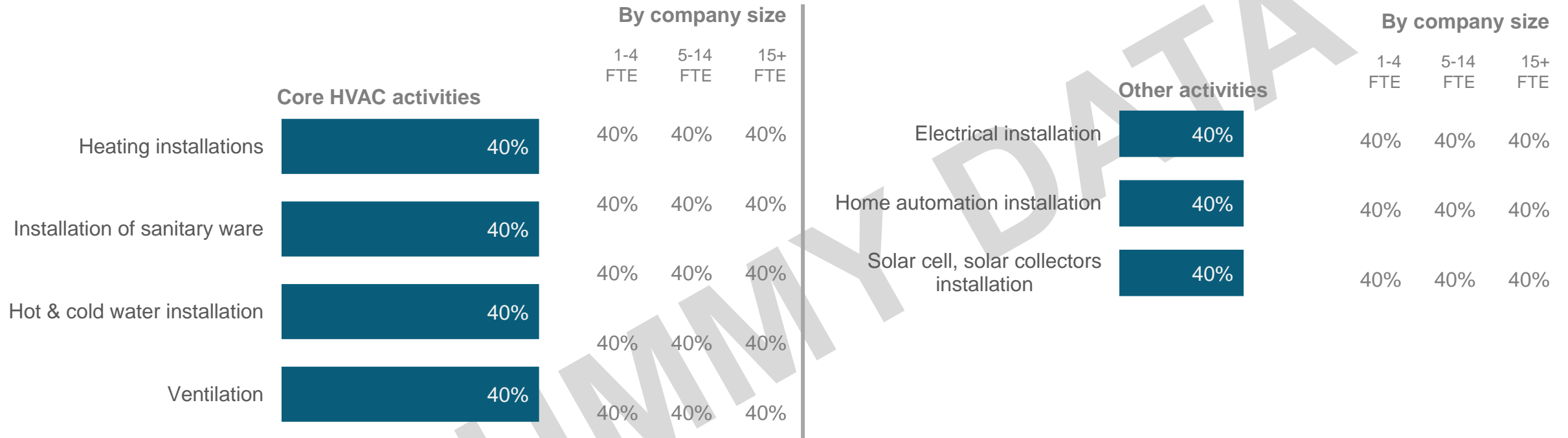
Core HVAC activities

Which of the following installation activities does your company perform?

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



Index

About European Mechanical Installation Monitor

Key takeaways

Profile of the Mechanical installer

Business development

Theme topic – Media orientation and consumption

Cross-country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Appendix



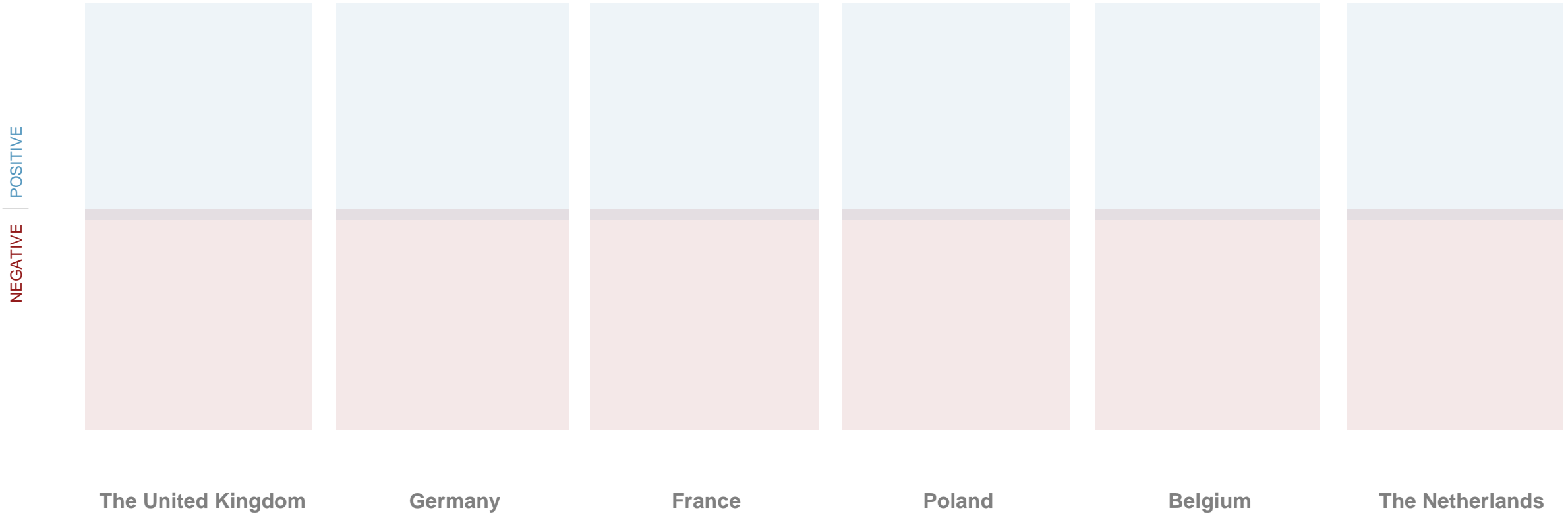
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa

Turnover outlook last quarters and expectations for Q1 2023

TURNOVER BALANCE

(% INCREASE minus % DECREASE)

COMPARISON SAME QUARTER LAST YEAR

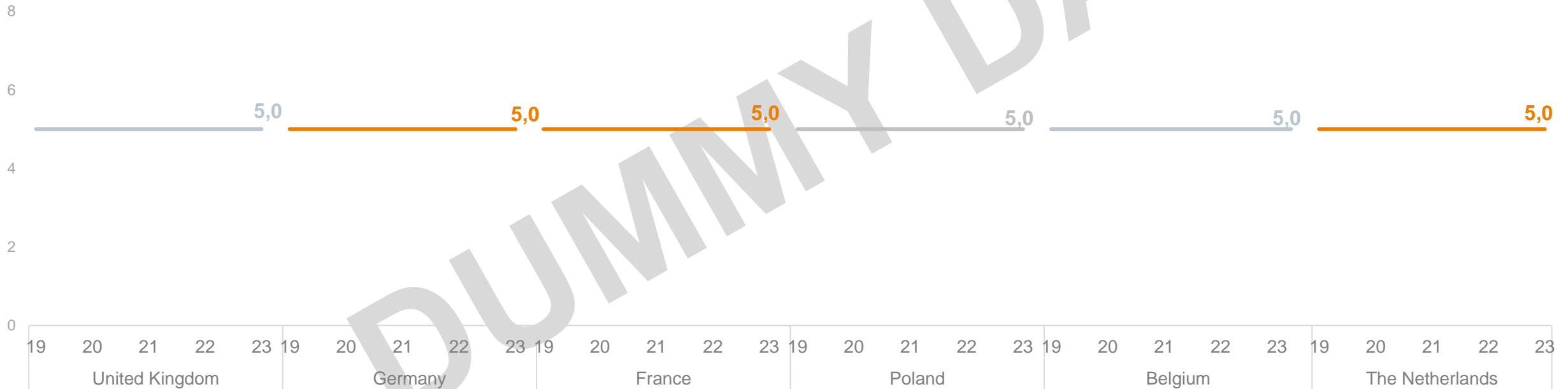


Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa

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?

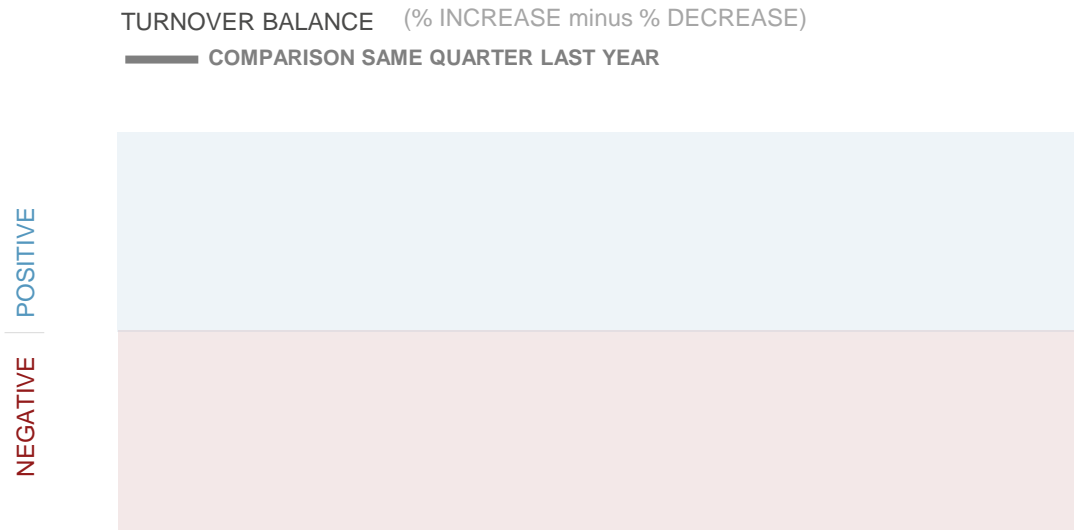
(MONTHS)



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

Turnover outlook

*If you compare your turnover of Q4-22 to Q4-21, how did your turnover develop?
What are your expectations for the development in Q1-23?*



Order book portfolio

How big is your current order book portfolio?

ORDER BOOK (MONTHS)
EU | THE UNITED KINGDOM

Index

About European Mechanical Installation Monitor

Key takeaways

Profile of the Mechanical installer

Business development

Theme topic – Media Orientation & Consumption

Cross-country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Appendix



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

Media sources in 2022 and the development in comparison to 2020*

In what degree do you use each of the following information sources in your work, for choosing products and brands? [very often, often + sometimes]

[VERY OFTEN + OFTEN + SOMETIMES]

TRADITIONAL MEDIA	Average	UK	Germany	France	Poland	Belgium	Netherlands
Usage of printed product documentation files	50%	50%	50%	50%	50%	50%	50%
Manufacturer magazines	50%	50%	50%	50%	50%	50%	50%
Professional magazines/newspapers	50%	50%	50%	50%	50%	50%	50%

Decrease in usage of >5% in comparison to 2020

Increase in usage of <5% in comparison to 2020

* 2020 was the year of the COVID -19 pandemic.

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

Media sources in 2022 and the development in comparison to 2020

In what degree do you use each of the following information sources in your work, for choosing products and brands [very often + often + sometimes]

PERSONAL MEDIA	Average	UK	Germany	France	Ireland	Belgium	Netherlands
Personal contact with representative of the manufacturer – telephone or visit	50%	50%	50%	50%	50%	50%	50%
Advice from wholesaler/ sales assistant of the wholesaler	50%	50%	50%	50%	50%	50%	50%
Events at the wholesaler site	50%	50%	50%	50%	50%	50%	50%
Visiting of events organised by manufacturers at manufacturer's site for clients or prospects	50%	50%	50%	50%	50%	50%	50%
Visiting trade shows	50%	50%	50%	50%	50%	50%	50%

Decrease in usage of >5% in comparison to 2020

Increase in usage of <5% in comparison to 2020

* 2020 was the year of the COVID -19 pandemic.

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

Media sources in 2022 and the development in comparison to 2020

In what degree do you use each of the following information sources in your work, for choosing products and brands? [very often + often + sometimes]

DIGITAL MEDIA	Average	UK	Germany	France	Poland	Belgium	Netherlands
Searching on the Internet	50%	50%	50%	50%	50%	50%	50%
Visiting websites of manufacturers	50%	50%	50%	50%	50%	50%	50%
Visiting websites of wholesalers	50%	50%	50%	50%	50%	50%	50%
Usage of digital product documentation files	50%	50%	50%	50%	50%	50%	50%
Reading manufacturers' newsletters	50%	50%	50%	50%	50%	50%	50%
Reading wholesalers' newsletters	50%	50%	50%	50%	50%	50%	50%
Apps from manufacturers	50%	50%	50%	50%	50%	50%	50%
Apps from wholesalers	50%	50%	50%	50%	50%	50%	50%
Online calculation and design tools from manufacturers	50%	50%	50%	50%	50%	50%	50%

Decrease in usage of >5% in comparison to 2020

Increase in usage of <5% in comparison to 2020

* 2020 was the year of the COVID -19 pandemic.

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

Media sources in 2022 and the development in comparison to 2020

In what degree do you use each of the following information sources in your work, for choosing products and brands [very often + often + sometimes]

SOCIAL MEDIA	Average	UK	Germany	France	Poland	Belgium	Netherlands
Specialised professional forums	50%	50%	50%	50%	50%	50%	50%
YouTube	50%	50%	50%	50%	50%	50%	50%
Personal network sites such as Facebook	50%	50%	50%	50%	50%	50%	50%
Business network sites such as LinkedIn, Xing	50%	50%	50%	50%	50%	50%	50%
Instagram	50%	50%	50%	50%	50%	50%	50%

Decrease in usage of >5% in comparison to 2020

Increase in usage of <5% in comparison to 2020

* 2020 was the year of the COVID -19 pandemic.

Index

About European Mechanical Installation Monitor

Key takeaways

Profile of the Mechanical installer

Business development

Theme topic – Media Orientation & Consumption

Cross-country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

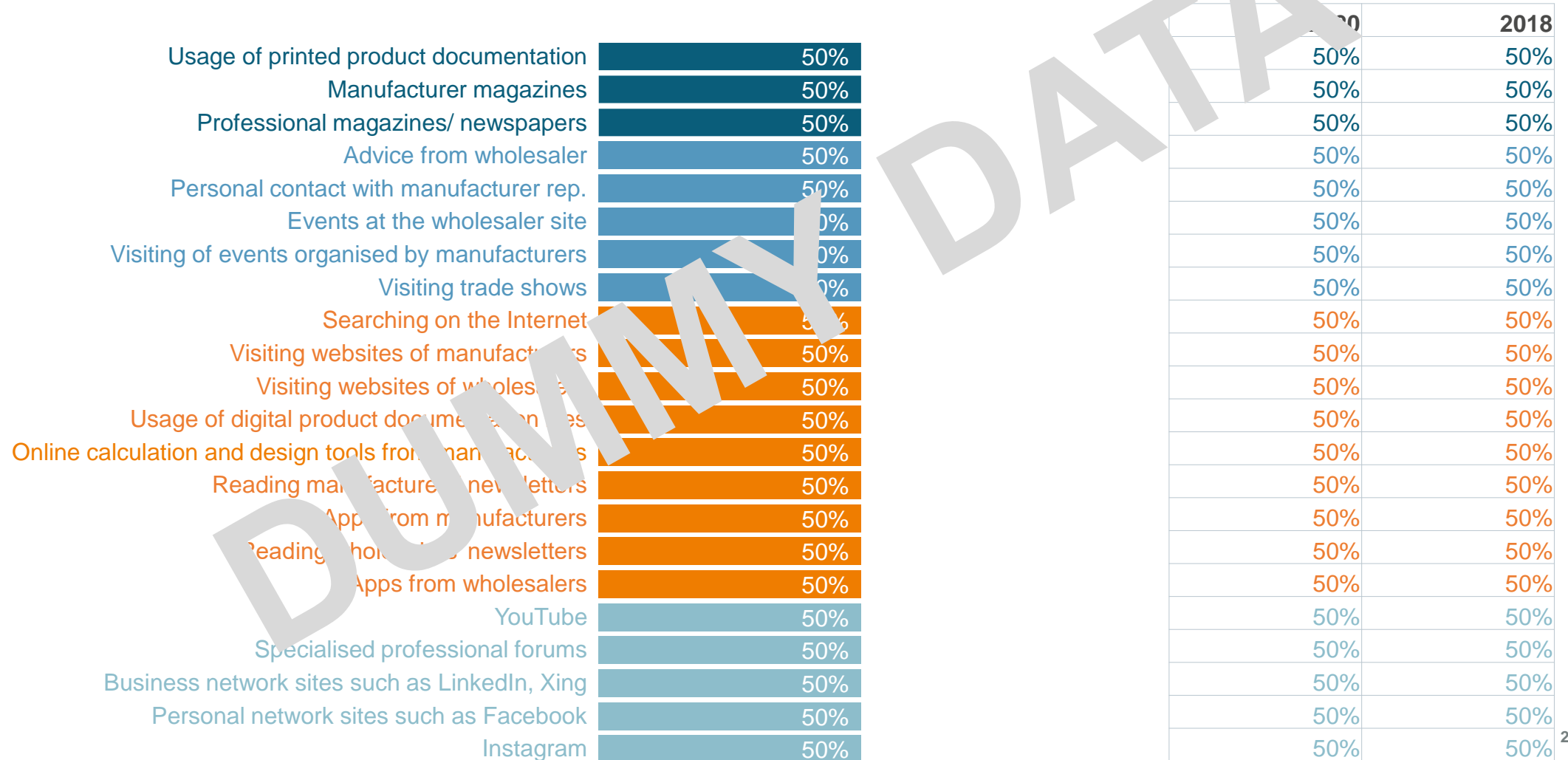
Appendix



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Media sources in 2022

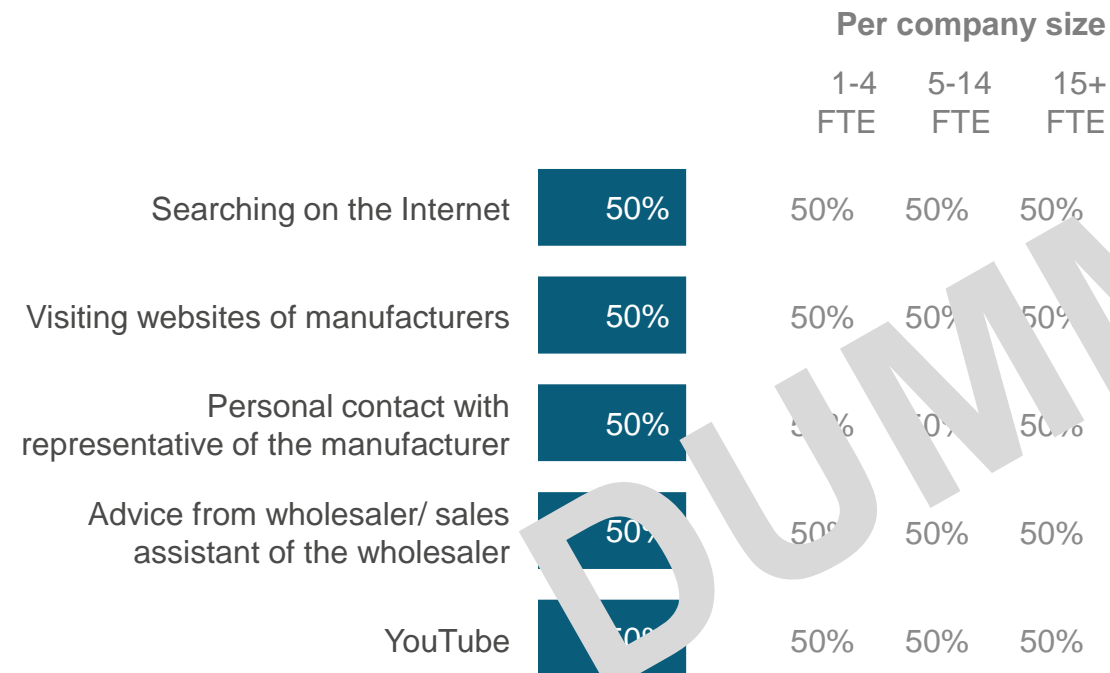
In what degree do you use each of the following information sources in your work, for choosing products and brands? [very often + often + sometimes]



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

Most useful information sources – Top 5

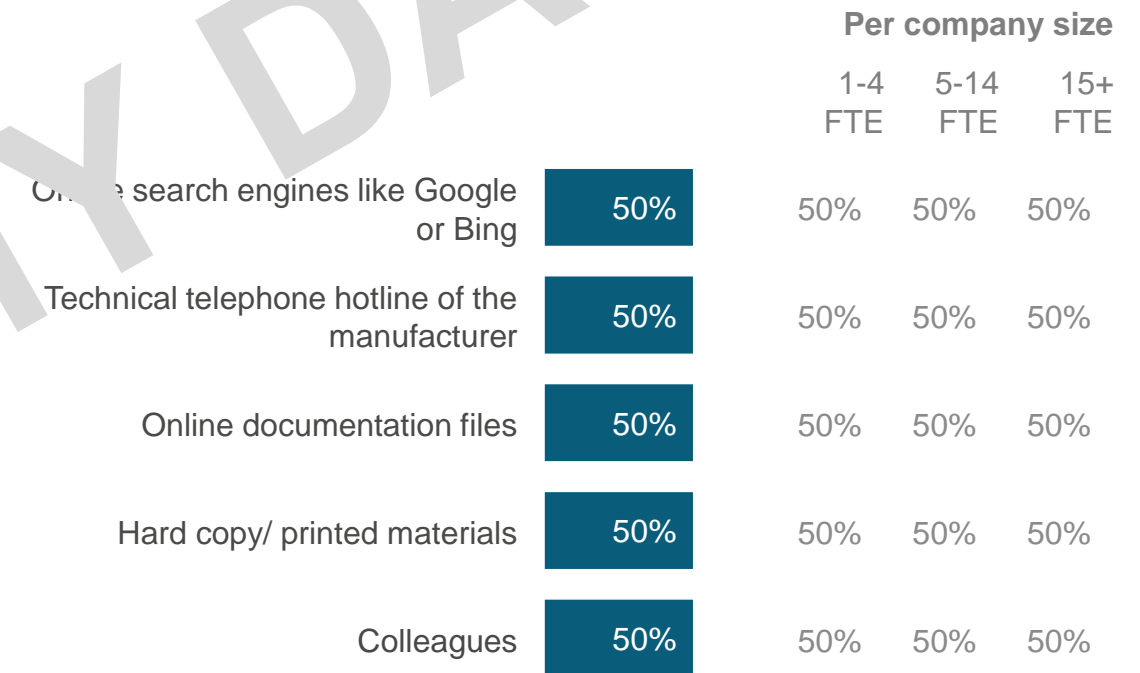
Of the information sources you use, which are for you the most useful/ helpful ones?



Base: n=125, all installers

Main sources of information when on a job site - Top 5

What is your main source of information when you are in the field, for example at the construction or service site? Please also let us know if you do not go in the field.

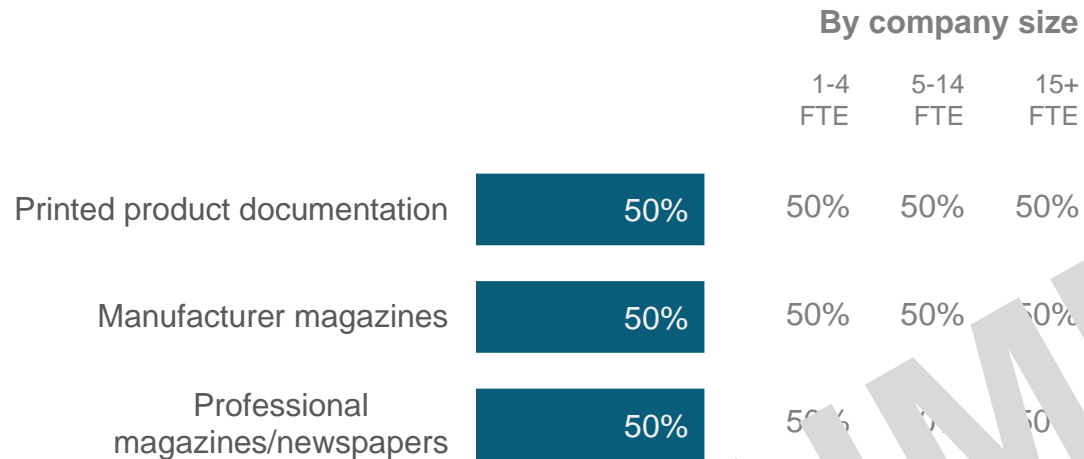


Base: n=125, all installers

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

Using traditional information sources

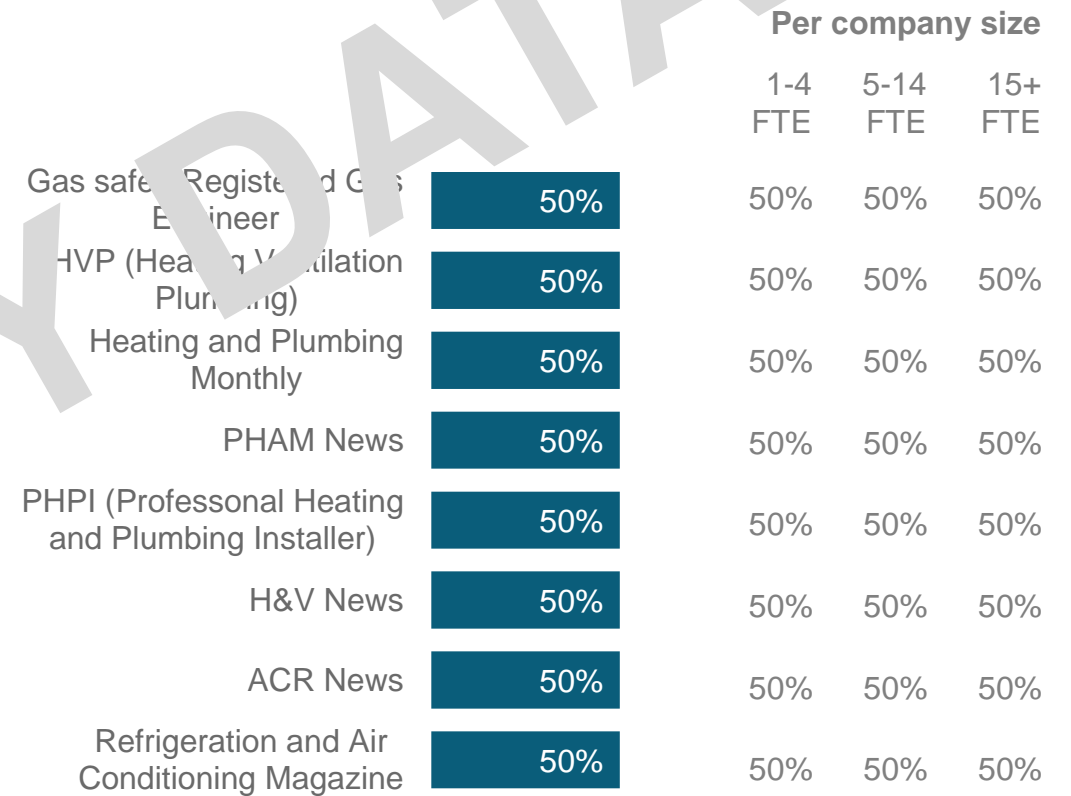
In what degree do you use following information sources?
(Very often + often + sometimes)



Base: n=125, asked to all installers

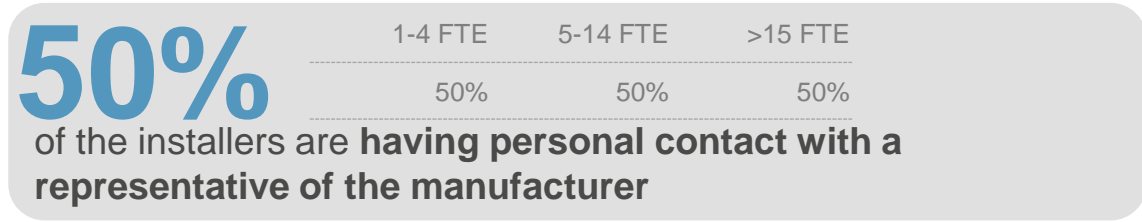
Most mentioned professional magazines & newspapers – Top 8

Which professional magazines do you read?



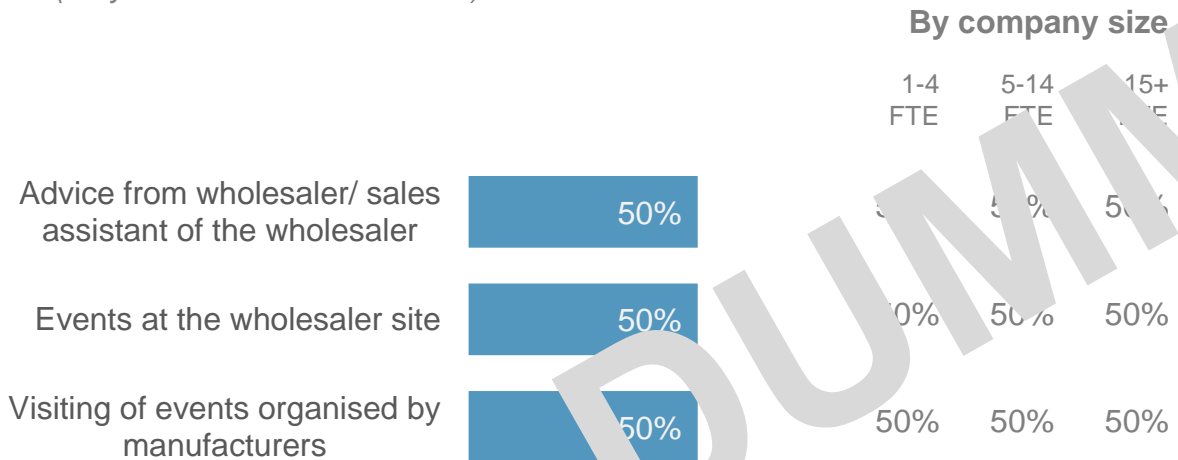
Base: n=61, if reading professional magazines

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



Using other personal information sources

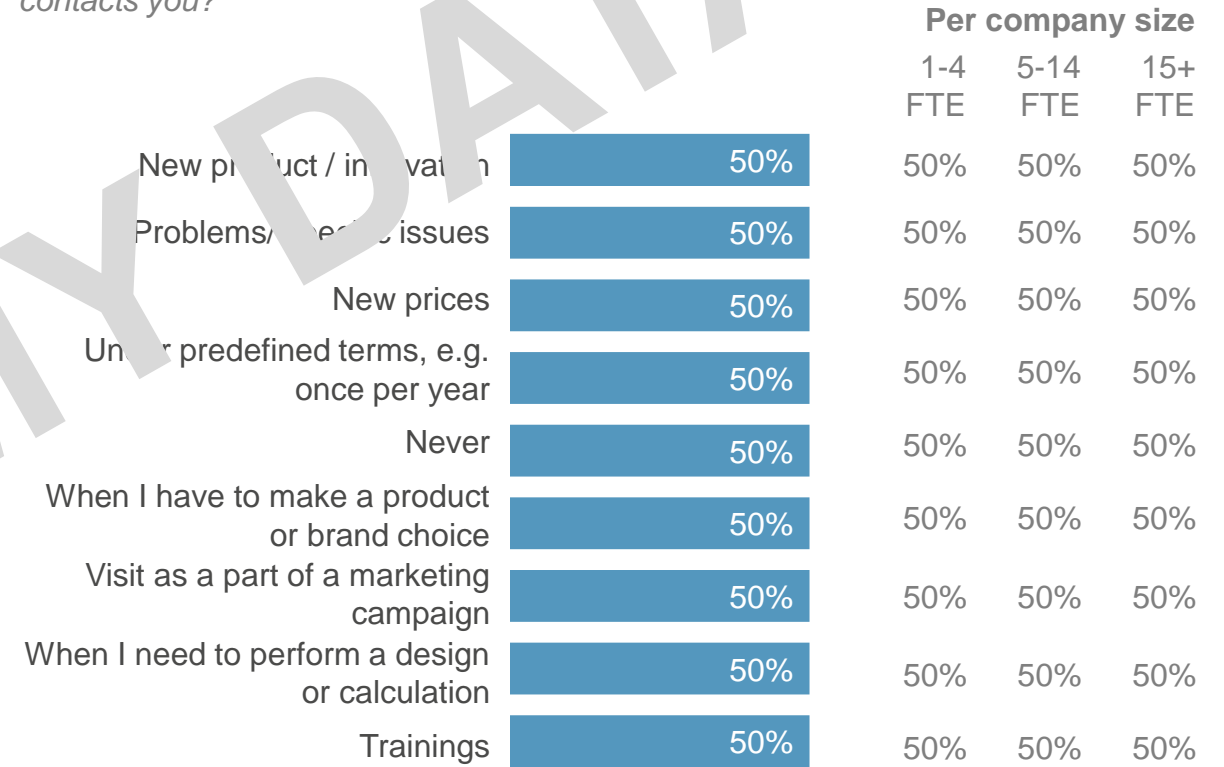
In what degree do you use following information sources? (Very often + often + sometimes)



Base: n=125, asked to all installers

Circumstances under which a contact with the manufacturer representative is appreciated

When/ in what cases do you appreciate a representative of the manufacturer contacts you?



Base: n=90, if they had a personal contact with representative of manufacturer

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

50%

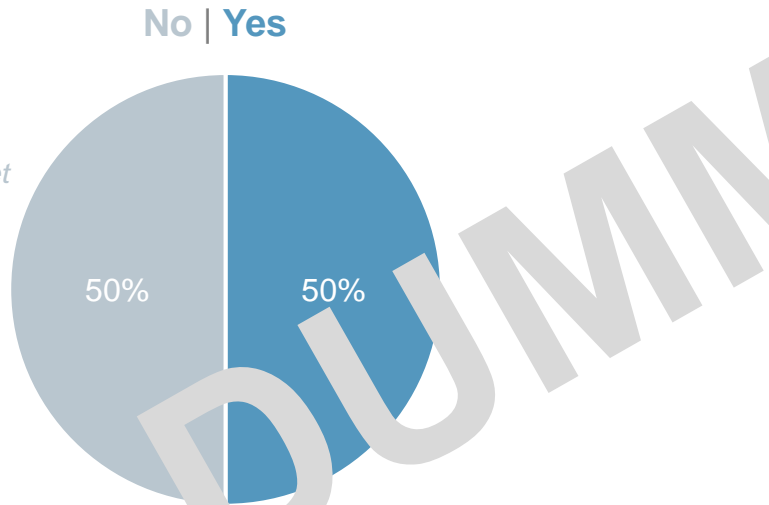
1-4 FTE	5-14 FTE	>15 FTE
50%	50%	50%

of the installers visit(ed) trade shows

Base: n=125, asked to all installers

Expectation of the ones who visited trade shows to do that in the coming years

Do you expect to be visiting trade shows in the coming years?



“ Lorem ipsum dolor sit amet, consectetur adipiscing elit

Aenean commodo ligula eget dolor.

Aenean massa. ”

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

Base: n=34, if visited trade shows

XX

1-4 FTE	5-14 FTE	>15 FTE
XX	XX	XX

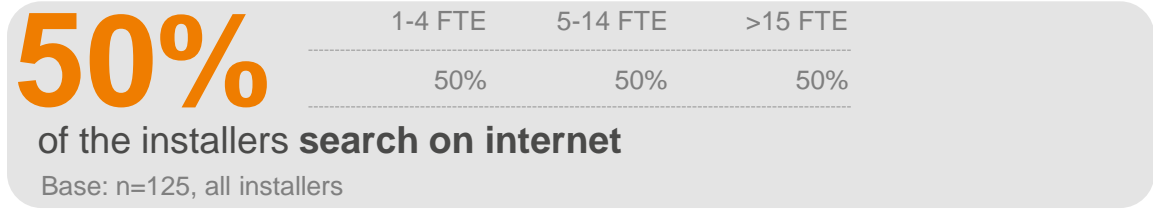
is the average number of trade shows installers will visit in next 2 years

Most popular trade shows
Which trade shows do you expect to visit in the coming 2 years?

	By company size		
	1-4 FTE	5-14 FTE	15+ FTE
Installer Show	50%	50%	50%
Home Building & Renovation	50%	50%	50%
PHEX	50%	50%	50%
Other	50%	50%	50%
Don't know	50%	50%	50%

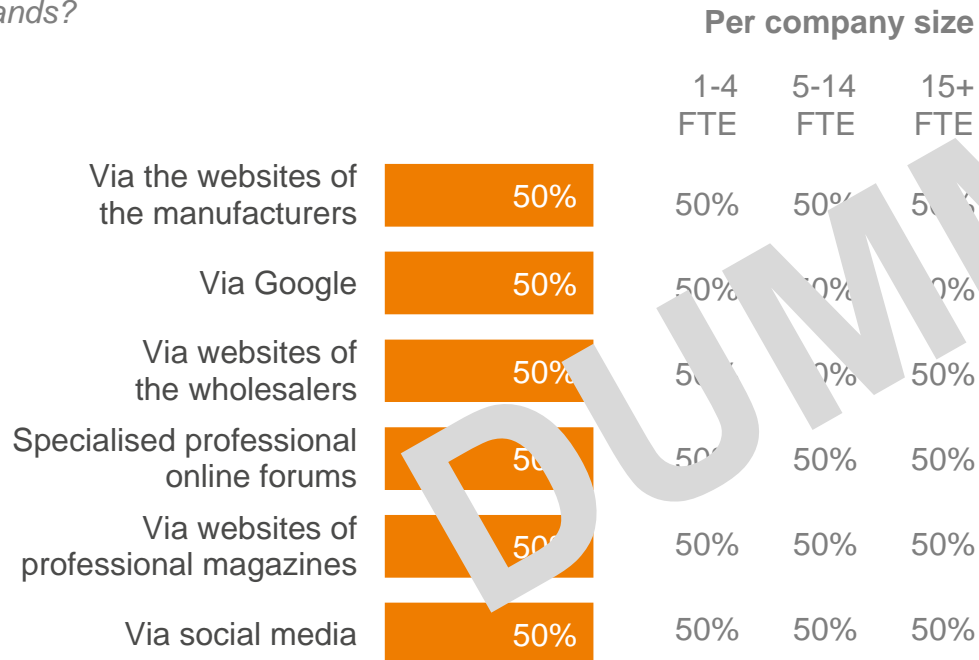
Base: n=30, if visited trade shows and expect to visit them in the coming 2 years

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



Types of websites where installers search information about products and brands - Top 6

Via what type of websites do you search information on Internet about products and brands?



Base: n=117, if searching on the internet

Most mentioned websites - Top 10

Could you please name the websites you visit when you search for information about products and brands?

	%
https://www.baxi.co.uk/	50%
https://www.idealheating.com/	50%
http://mhi-hvac.co.uk/ (Mitsubishi)	50%
http://www.vaillant.co.uk/	50%
https://www.screwfix.com/	50%
https://www.google.com/	50%
https://www.grundfos.com/uk	50%
https://www.mirashowers.co.uk/	50%
https://www.daikin.co.uk/	50%

Base: n=117, if searching on the internet

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

50%

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

of the installers search on manufacturers websites

Base: n=125, all installers

Type of information installers would like to find on manufacturer's website – Top 10

What type of information would you like to find on the website of a manufacturer?

		Per company size		
		1-4 FTE	5-14 FTE	15+ FTE
(Technical) product information	50%	50%	50%	50%
Specification texts	50%	50%	50%	50%
Installation instructions/ videos	50%	50%	50%	50%
Prices	50%	50%	50%	50%
Availability of products	50%	50%	50%	50%
Services/Support	50%	50%	50%	50%
Calculation tools for the product performance	50%	50%	50%	50%
Product innovation	50%	50%	50%	50%
Application possibilities of the products	50%	50%	50%	50%
Environmental performances of the products	50%	50%	50%	50%

Base: n=110, if searching on manufacturers websites

50%

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

of the installers would you like to have the chatbot function the manufacturer's webs

Base: n=110, if searching on manufacturers websites

Printed vs digital materials

Would you prefer to receive brochures, catalogues, flyers, and magazines from the manufacturer in print or digitally in the future?

		By company size		
		1-4 FTE	5-14 FTE	15+ FTE
Digitally	50%	50%	50%	50%
Printed	50%	50%	50%	50%
Don't know/no opinion	50%	50%	50%	50%

Base: n=125, all installers

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

50%

of the installers use apps for professional purpose

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

Base: n=125, Asked to all

Apps used for professional purposes - Top 10

Can you mention which Apps do you use on a regular basis for professional purposes?

	%
WhatsApp	50%
Baxi	50%
Vaillant	50%
Ideal	50%
Daikin	50%
Mitsubishi app	50%
Bosch/Worcester	50%
Apps from manufacturer	50%
Apps from wholesaler	50%
Gas App UK	50%

Base: n=67, if using apps for professional purposes

Main purpose of using apps for professional purpose – Top 10

What do you use the Apps for?

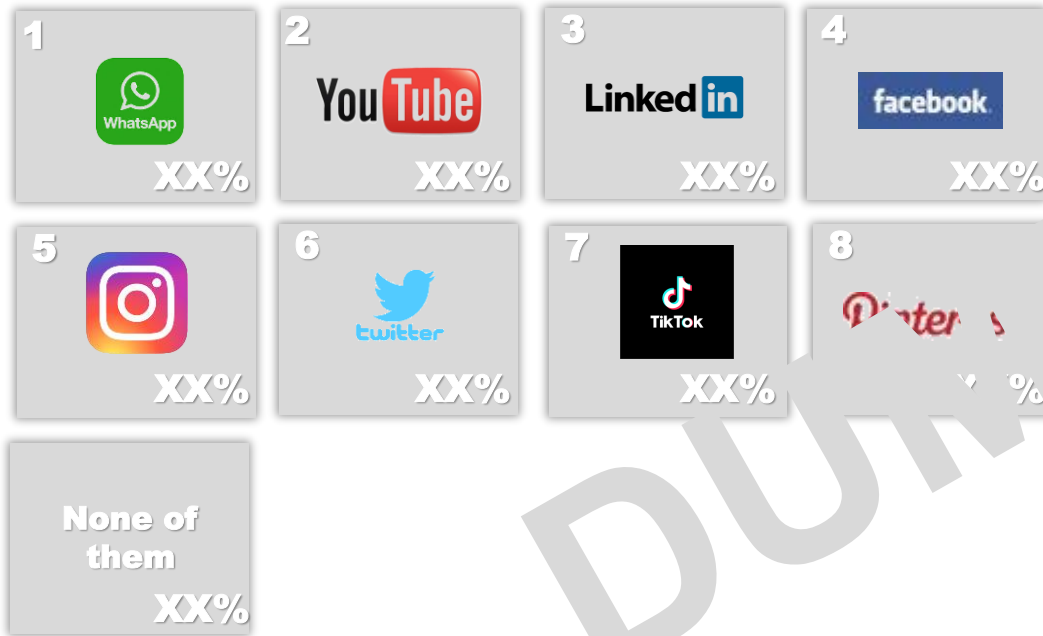
		Per company size		
		1-4 FTE	5-14 FTE	15+ FTE
Advice about products	50%	50%	50%	50%
Communication	50%	50%	50%	50%
Technical product information	50%	50%	50%	50%
Making calculations	50%	50%	50%	50%
Serial number registration	50%	50%	50%	50%
Communication	50%	50%	50%	50%
Configuration	50%	50%	50%	50%
Troubleshooting	50%	50%	50%	50%
Installation instructions	50%	50%	50%	50%
Placing orders	50%	50%	50%	50%

Base: n=67, if using apps for professional purpose

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

Usage of social media for professional purposes

Which of the following social media do you use for professional purpose?



Base: n=125, Asked to all

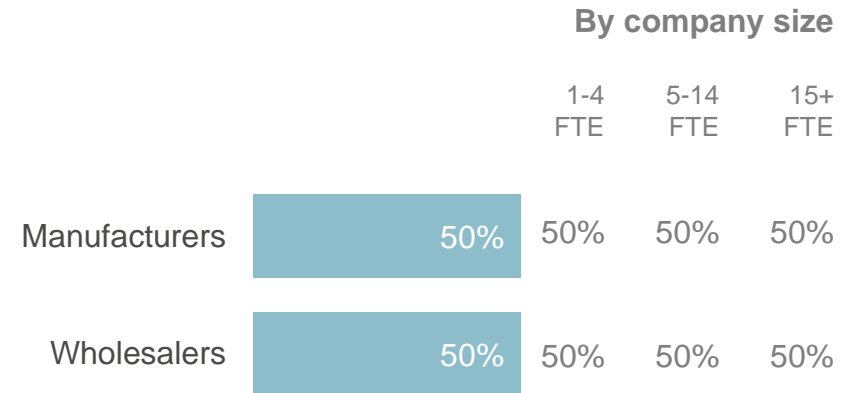
XX minutes

is the average time UK retailers spend on social media per week

Base: n=97, if using social media for professional purposes

WhatsApp

Do you use WhatsApp to communicate with manufacturers?
Do you use WhatsApp to communicate with wholesalers?



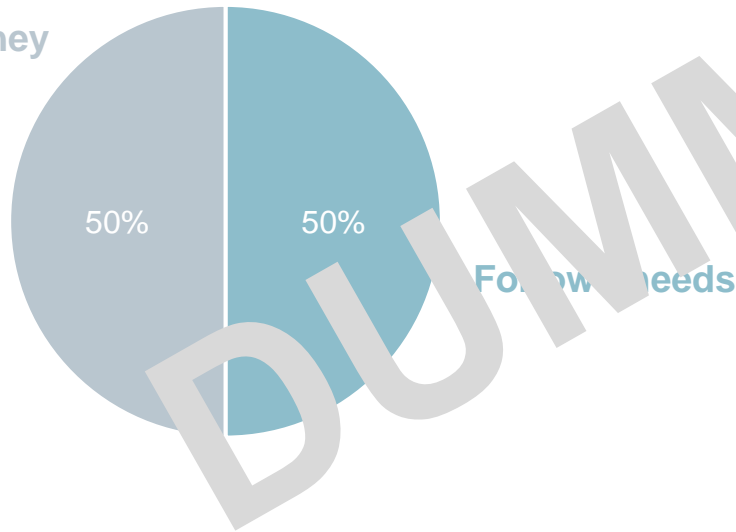
Base: n=61, if using WhatsApp

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

Drivers behind the social media usage

Which of the following describes better the usage of social media by you: I use social media for my own needs or I use social media because clients share with me social media inspiration they want me to check.

Clients share social media inspiration they want me to check



Base: n=97, if using social media for professional purposes

Reasons for using social media for professional purposes – Top 12

In what situation do you use social media for professional purpose?

	Percentage	Per company size		
		1-4 FTE	5-14 FTE	15+ FTE
To promote my own business	50%	50%	50%	50%
To show my (finished) work	50%	50%	50%	50%
Product range information	50%	50%	50%	50%
Asking for advice/ problem...	50%	50%	50%	50%
Opinion of colleagues	50%	50%	50%	50%
Solution of technical problems	50%	50%	50%	50%
Market trends and developments	50%	50%	50%	50%
Latest news	50%	50%	50%	50%
Innovations	50%	50%	50%	50%
Manufacturer promotions	50%	50%	50%	50%
Installation instructions	50%	50%	50%	50%

Base: n=97, if using social media for professional purposes

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



50%

1-4 FTE 5-14 FTE >15 FTE

50% 50% 50%

of the installers are **listening to the radio** while at work

Base: n=125, Asked to all

Radio channels that are listened to

And which radio stations do you listen to most of the time? Top 10

	Per company size		
	1-4 FTE	5-14 FTE	15+ FTE
Radio 2	50%	50%	50%
Radio 1	50%	50%	50%
Heart	50%	50%	50%
Smooth	50%	50%	50%
Absolute radio	50%	50%	50%
Greatest Hits	50%	50%	50%
Talk Sport	50%	50%	50%
Magic	50%	50%	50%
BBC Radio	50%	50%	50%
Talk radio	50%	50%	50%

Base: n=69, if listening to radio while at work

Index

About European Mechanical Installation Monitor

Key takeaways

Profile of the Mechanical installer

Business development

Theme topic – Media Orientation & Consumption

Cross-country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Appendix

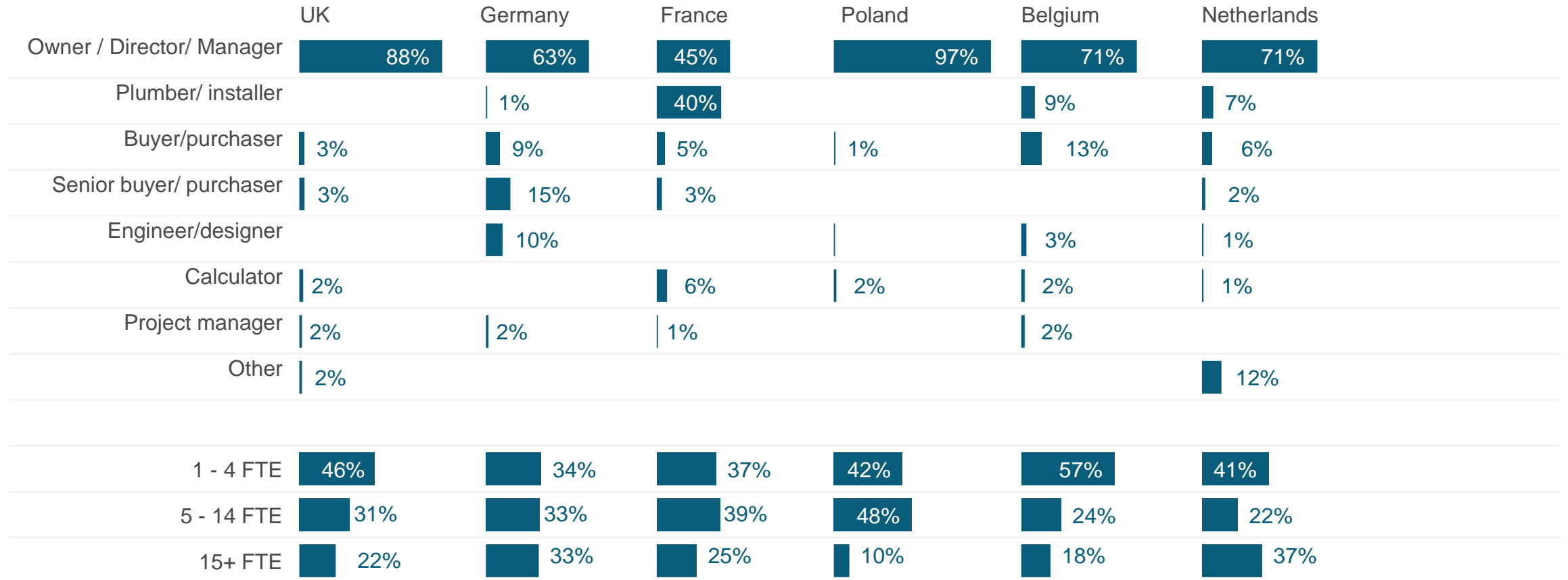


Respondents' background characteristics

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?



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 2022



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**



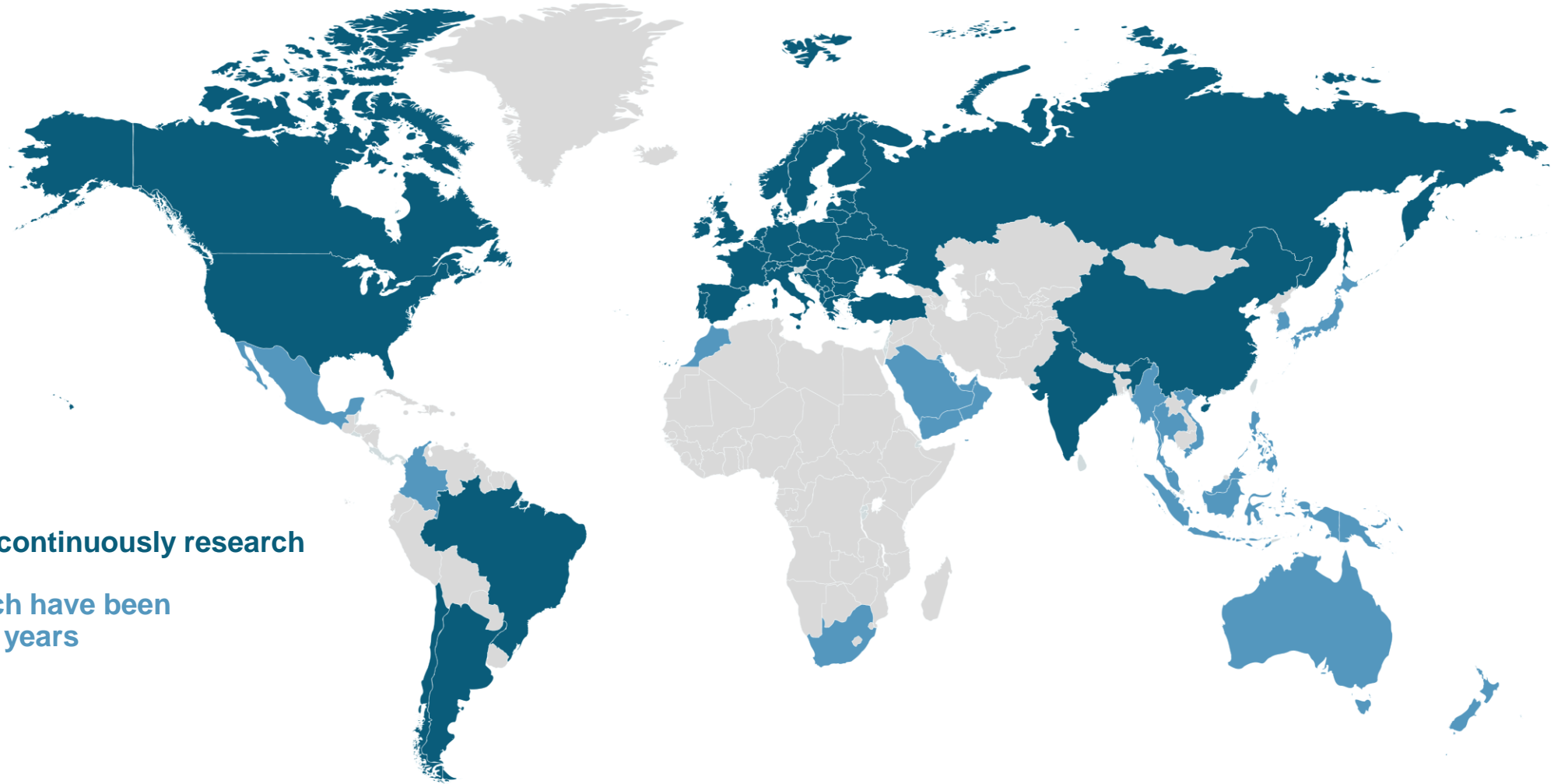
Dedicated market research

- 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

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	
							
							
							
							
							
							
							

USP Marketing Consultancy

© 03 March 2023, USP Marketing Consultancy B.V.

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