



European Electrical Installation Monitor Q4-2023

Theme topic: Purchase channels

Jan-2024

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Business development

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Cross country summary

United Kingdom

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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 four times per year, by means of phone interviews with registered electrical installation companies, divided over seven major European markets.

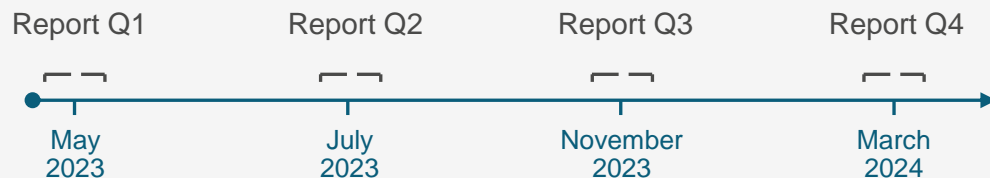
THE RESEARCH TOPICS

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**

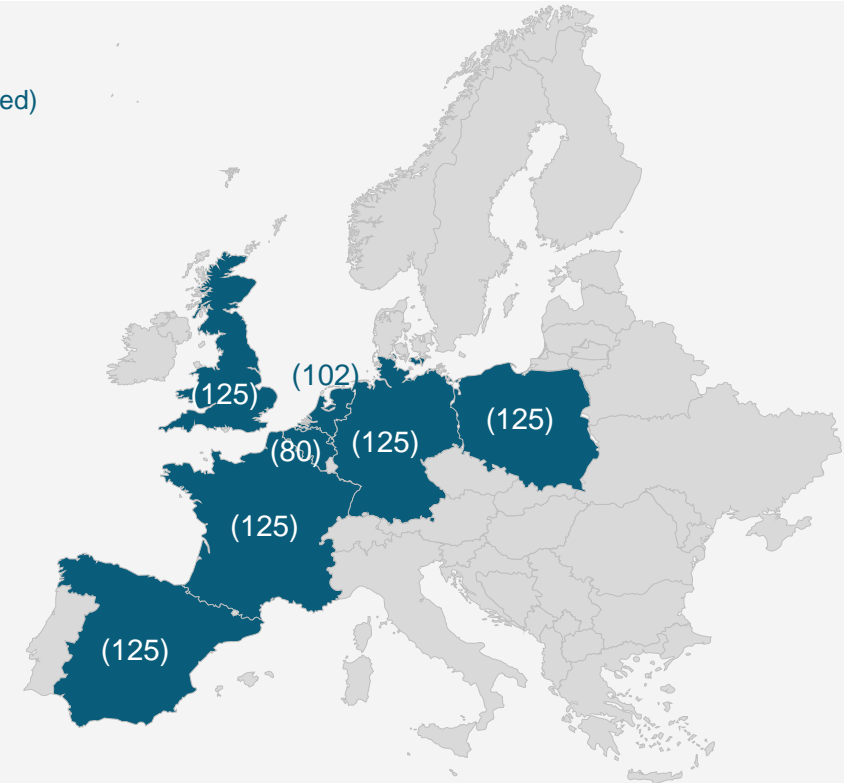
THE TIMELINE



COUNTRY SCOPE

(number of interviews conducted)

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



PROJECT TEAM



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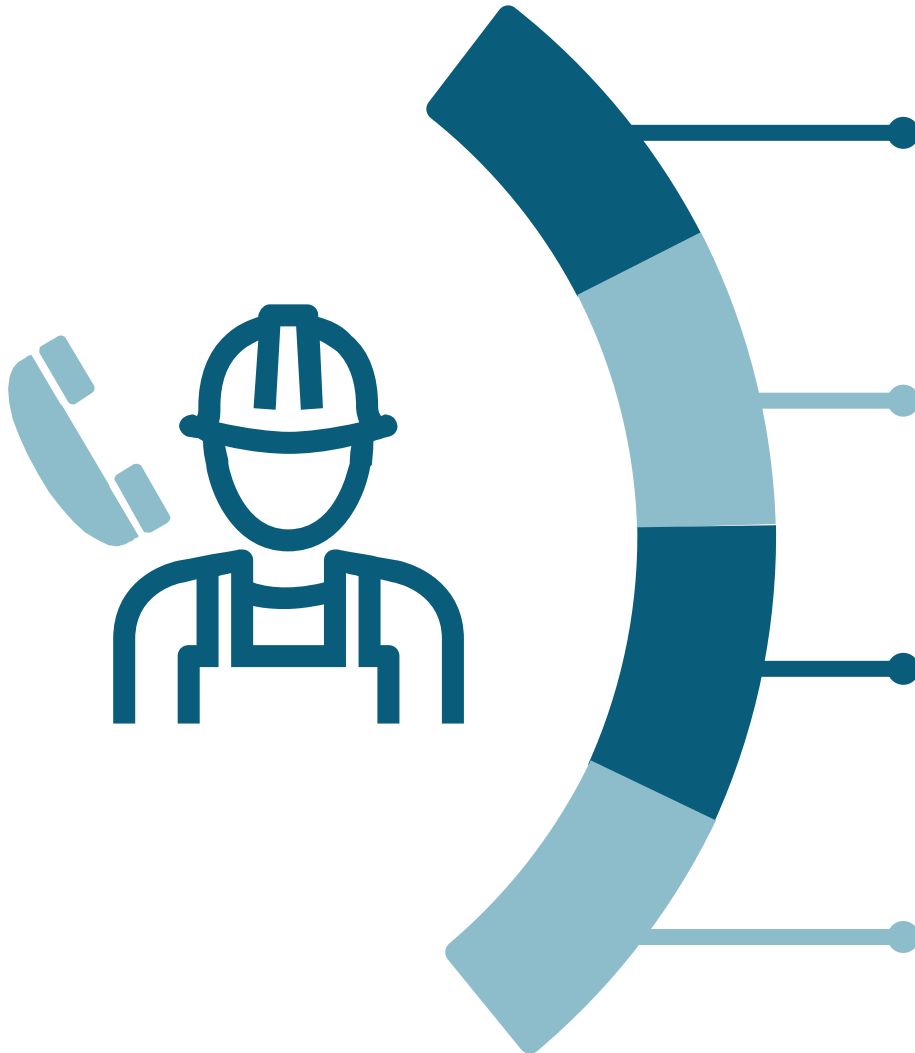


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About target group & methodology



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 Q4 theme topic



Surveying the Purchase channel topic...

This quarter we investigated the topic of purchase channels by asking installers about their purchasing of professional installation products used in their daily job.

In the questionnaire, we make a clear difference between the two types of purchase channels (1) traditional stores (specialised installation wholesalers, hardware stores, building merchants, directly from the manufacturer, DIY stores) and (2) new channels such as pure online shops (e.g. Amazon). We also distinguish between the ways of ordering as they can place their order (1) via telephone/ fax/ e-mail/ EDI-SAP/ at the counter of a wholesale branch, (2) online via the website of any of the traditional channels and (3) online at a pure online shop.

...allows for better understanding of installers' purchasing behaviour and their purchasing preferencesbehavior

To provide insights in this, we looked at this topic from various angles and mapped out:

- Purchase channels used and the distribution of total budget over channels;
- Ways of ordering products;
- Ways of getting ordered products and the average delivery time;
- Installers' expectations regarding future purchasing behaviour.

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Key takeaways

DUMMY DATA



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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		Turnover balance
		Negative Positive
Netherlands	Q4-23	20%
	Exp. Q1-24	20%
Germany	Q4-23	20%
	Exp. Q1-24	20%
Spain	Q4-23	20%
	Exp. Q1-24	20%
Belgium	Q4-23	20%
	Exp. Q1-24	20%
France	Q4-23	20%
	Exp. Q1-24	20%
UK	Q4-23	20%
	Exp. Q1-24	20%
Poland	Q4-23	20%
	Exp. Q1-24	20%

Key takeaways

DUMMY DATA

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Purchase channels

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European overview

% of installers buying via... | Share of wallet (SOW)

Specialised wholesaler	50%	50%
Building material wholesaler	50%	50%
Hardware store	50%	50%
DIY store	50%	50%
Directly from the manufacturer	50%	50%
Installation-specialised pure online shop	50%	50%
Non-specialised pure online shops	50%	50%

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Electrical installation companies offer various electrical services

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Electrical installation **activities** installers are involved in [Q4 2022]

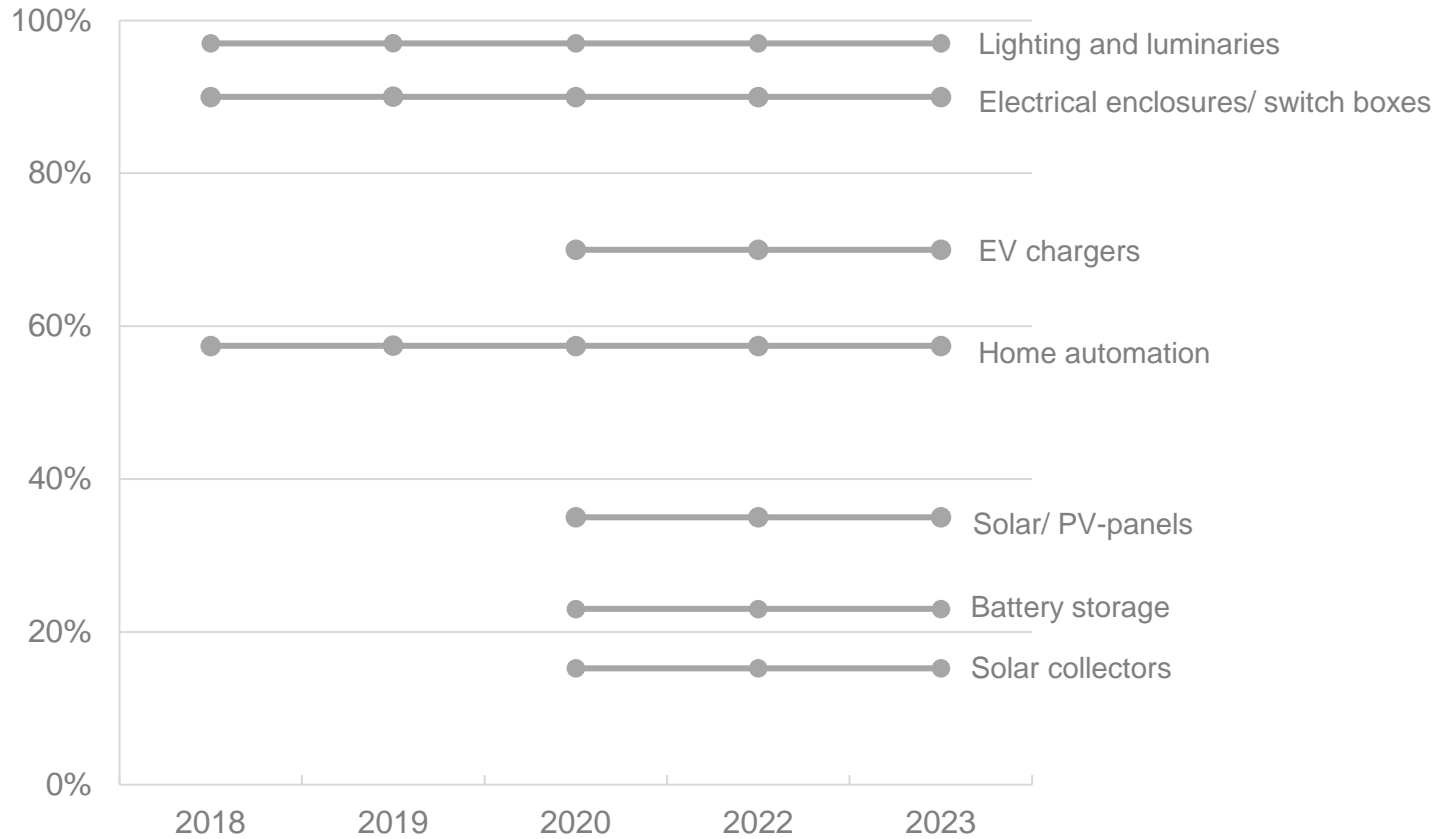
Q: Does your company do the following activities?

	UK	Germany	France	Poland	Belgium	Netherlands	Spain
Electrical enclosures/ switch boxes	50%	50%	50%	50%	50%	50%	50%
Lighting and luminaries	50%	50%	50%	50%	50%	50%	50%
Home automation	50%	50%	50%	50%	50%	50%	50%
EV charging stations	50%	50%	50%	50%	50%	50%	50%
Electrical panels	50%	50%	50%	50%	50%	50%	50%
Solar/ PV-panels	50%	50%	50%	50%	50%	50%	50%
Battery storage	50%	50%	50%	50%	50%	50%	50%
Solar collectors	50%	50%	50%	50%	50%	50%	50%

DUMMY DATA

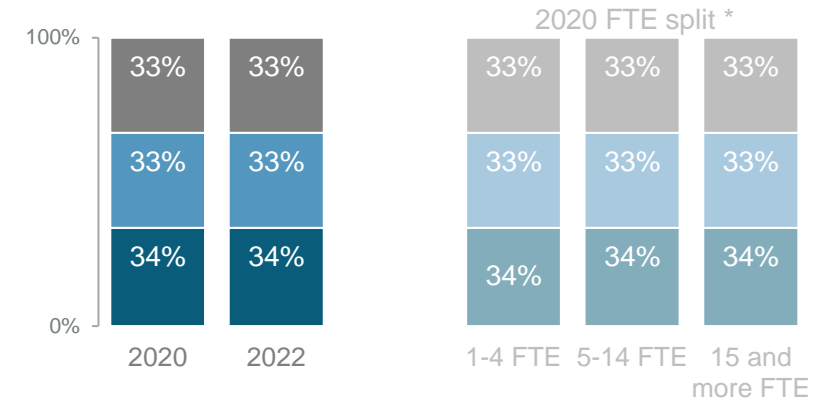
DUMMY DATA

Installation **activities** electrical installers are involved in [Trend]



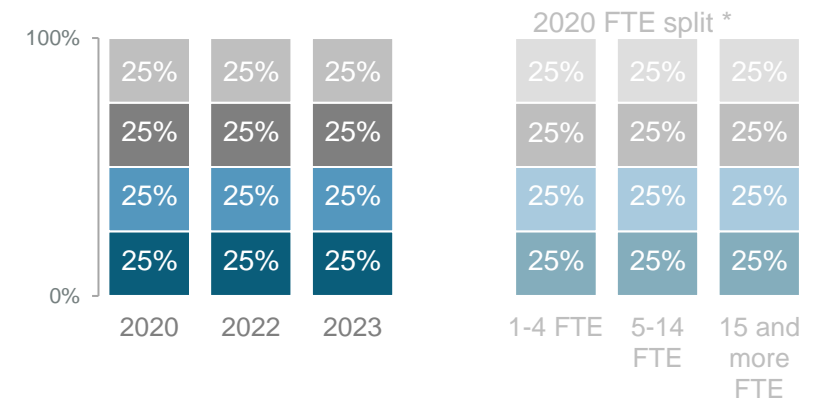
Turnover distribution per **project type**

New build | **Renovation** | Maintenance (planned/ ad-hoc)



Turnover distribution per **segment**

Residential | **Commercial** | Industrial | Infrastructural



*Based on Q4 data only

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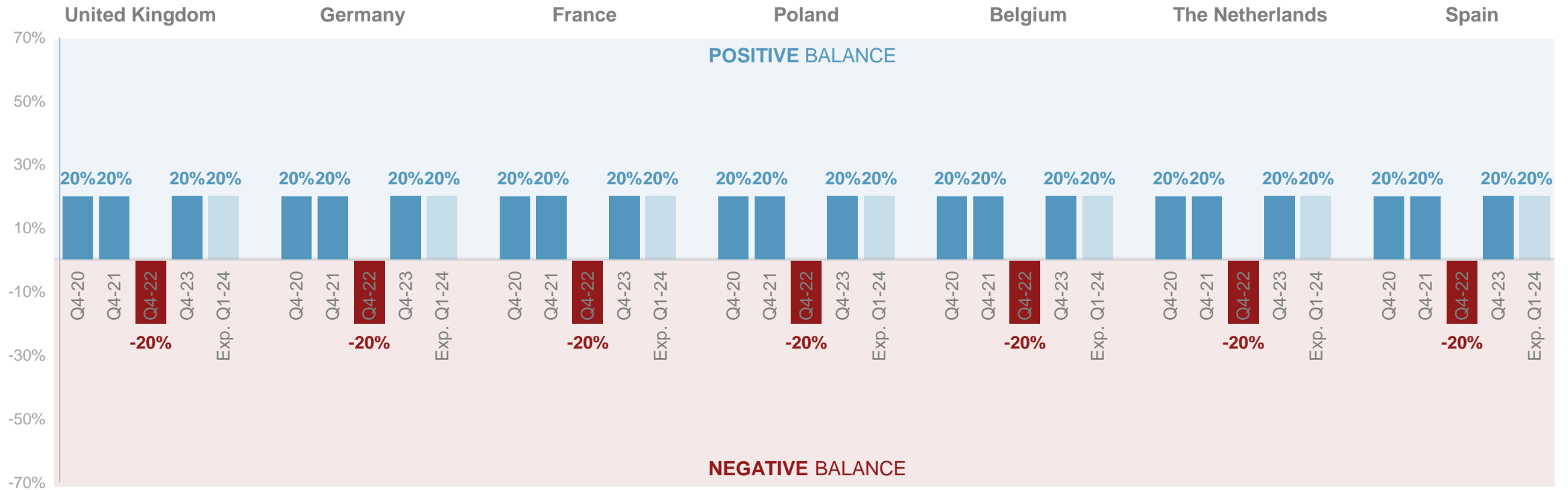
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DUMMY DATA

Turnover balance

Q: If you compare your turnover of Q4-23 to the same quarter last year, how did your turnover develop?

(% INCREASE minus % DECREASE)



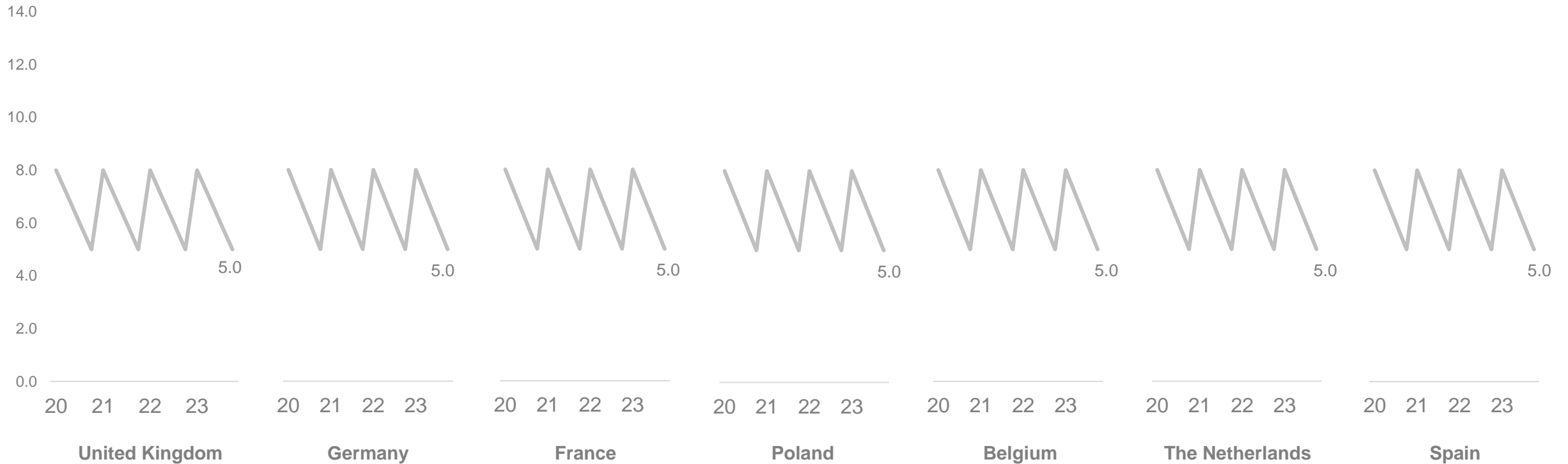
Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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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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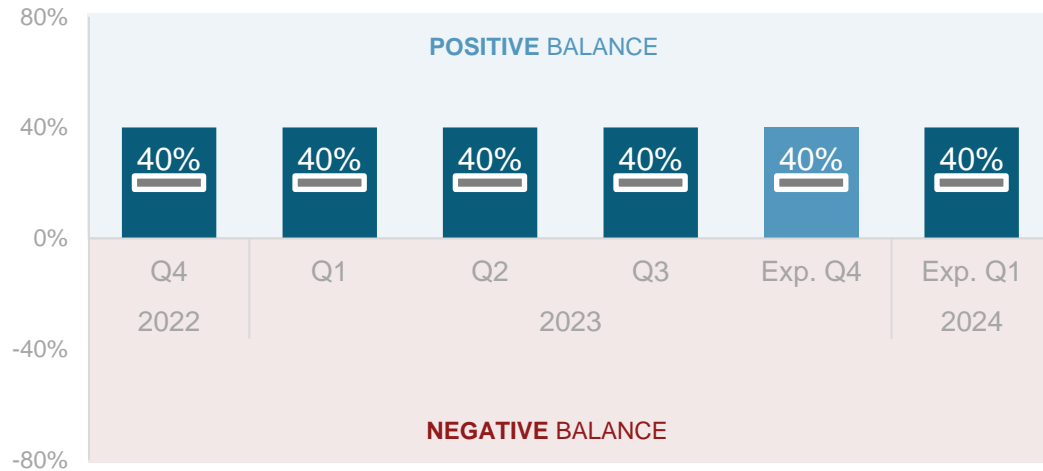
DUMMY DATA

Turnover balance

Q: If you compare your turnover of Q4-23 to the same quarter last year, how did your turnover develop? What are your expectations for the development in Q1-24?

TURNOVER BALANCE = % INCREASE minus % DECREASE)

— COMPARISON SAME QUARTER LAST YEAR



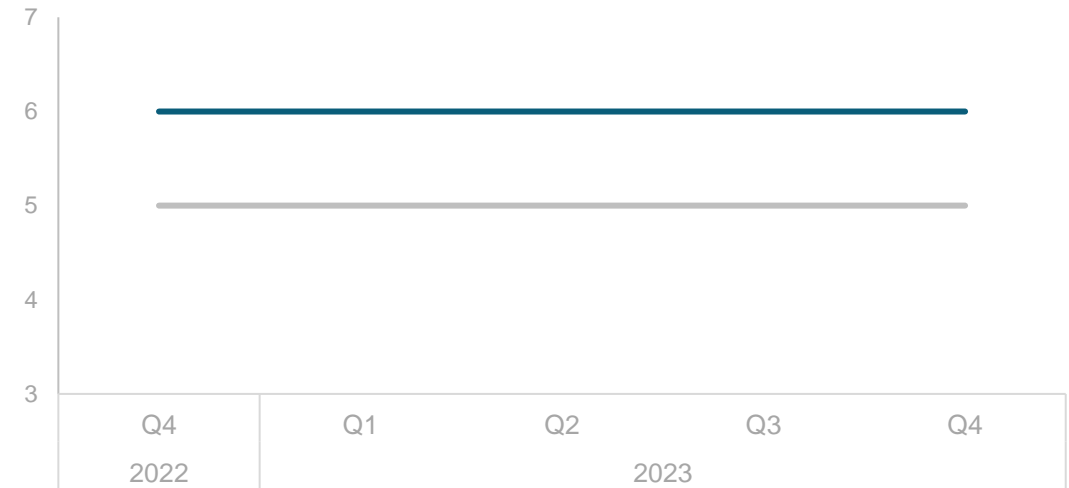
Detailed information regarding the turnover distribution can be found in the [appendix](#).

Order book portfolio

Q: How big is your current order book portfolio?

ORDER BOOK (MONTHS)

EU | THE UNITED KINGDOM



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- In the theme part of Q4 2023, special attention is paid to **Purchase channels**.
- In the past, manufacturers delivered their products to the professional wholesalers (general and specialised) only. These channels sold the products to professionals. This we call the traditional three-tier model. Nowadays, the purchase decision-making process is much more complex than decades ago, and online buying options are numerous. This development has led to a switch from the traditional three-tier model to the current dynamic model in which the traditional purchase channels are blurring, and various channels are serving different target groups. Manufacturers do not only sell to wholesalers anymore but are also selling directly to professionals. Some of the DIY stores are focusing more and more on professionals as well. In addition, specialised and non-specialised pure online shops have appeared and are trying to take over the business of traditional wholesalers.
- This chapter will give insight into installers' purchasing behaviour and preferences.
- Some of the topics that are covered:
 - Distribution of total purchase among channels;
 - Ways of ordering products;
 - Ways of getting ordered products and the average delivery time;
 - Reasons for using/ preferring a certain channel;
 - Installers' expectations regarding future purchasing behaviour.
- After this introduction, a cross-country summary will be given, comparing the countries to each other on the main findings of the purchase channel topic. After that, the results per country will be shown on a more detailed level.

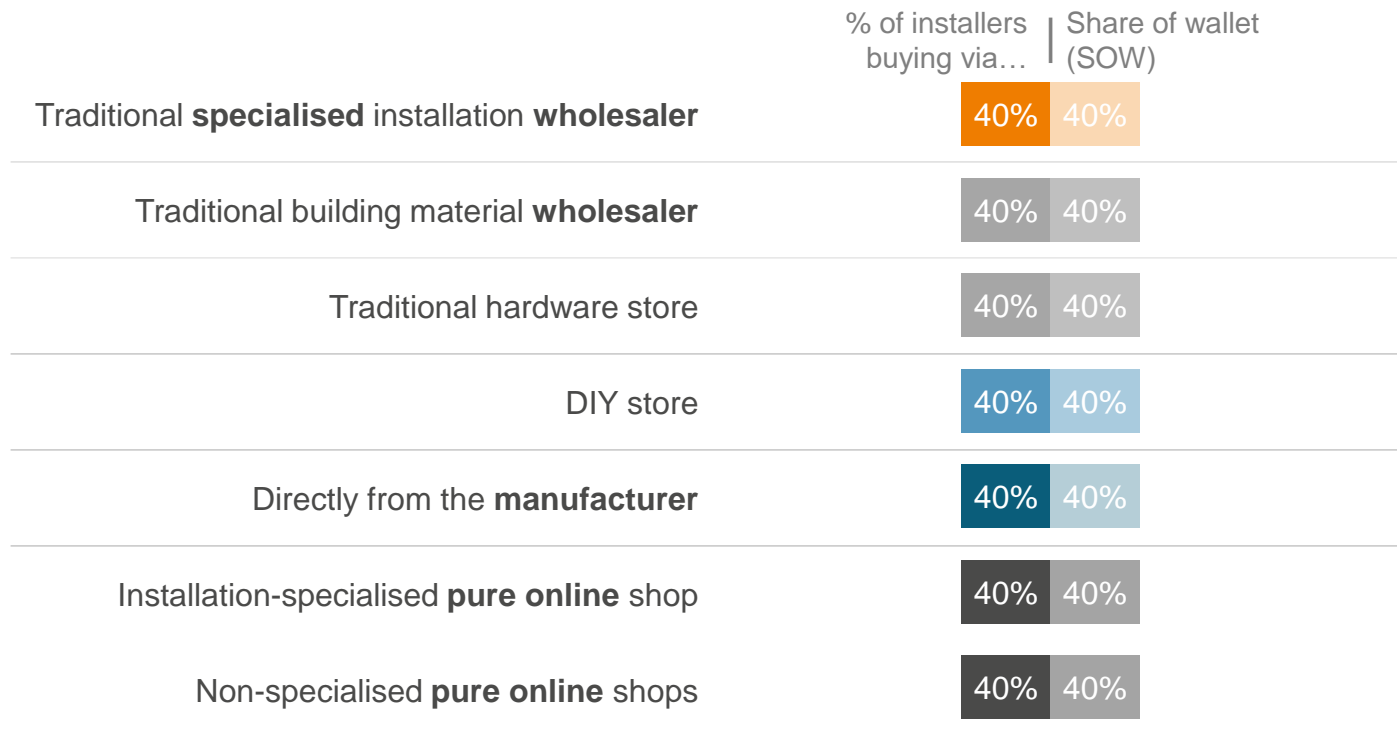
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DUMMY DATA

Purchase channels used & the distribution of a total purchase among channels

Q: Do you buy electrical installation products used in your daily job through the following channels? | Q: What share of your total purchase on installation-related products is done via...?

Manufacturer | **Wholesaler** specialised | **DIY** | **Pure online** specialised & non-specialised | **Other** building materials wholesaler; hardware store



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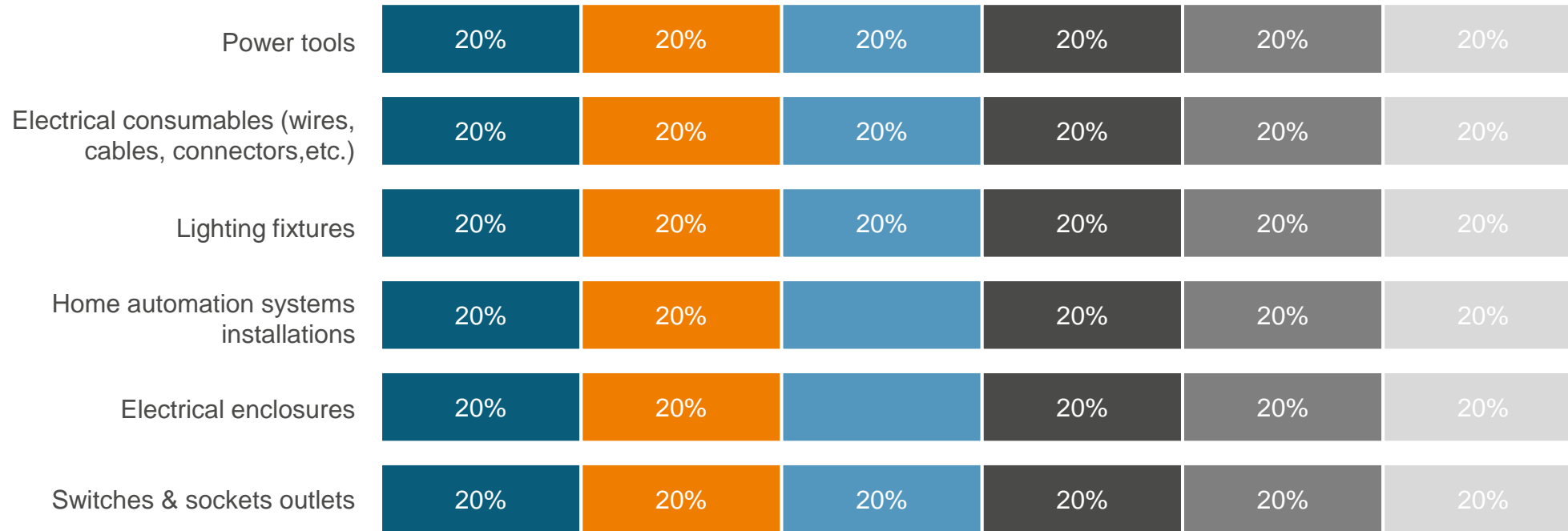
On average, European installers use **X** purchase channels

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Distribution of product group purchases across channels

Q: How would you divide your purchases on <product group> over the following channels?

Manufacturer | **Wholesaler** | **DIY** | **Pure online** | **Other (building materials wholesale, hardware stores, etc)**



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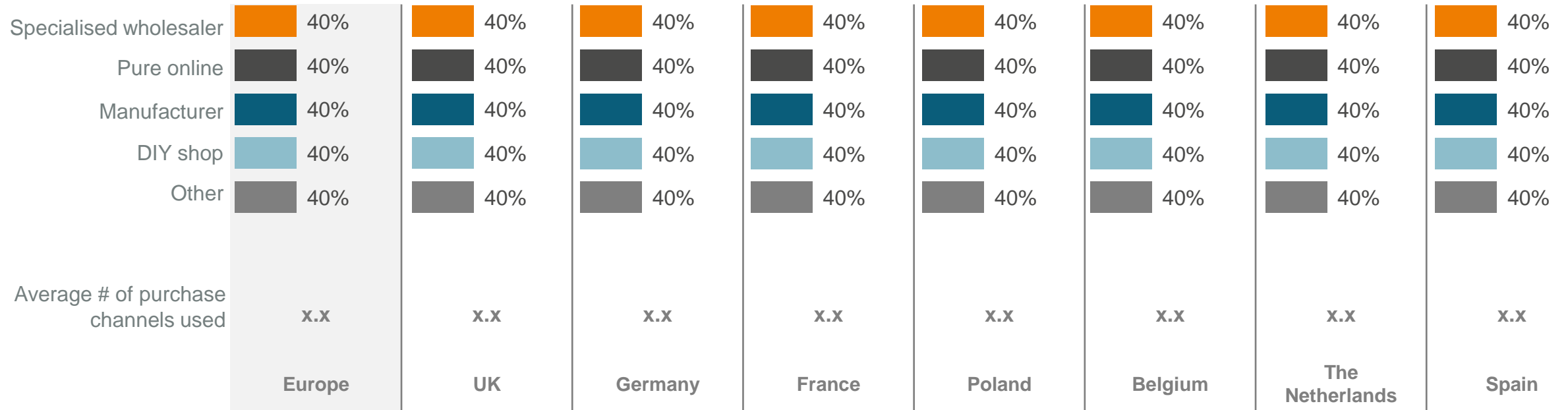
DUMMY DATA

Purchase channels

Q: Do you buy electrical installation products used in your daily job through the following channels?

Manufacturer | **Wholesaler specialised** | **DIY** | **Pure online specialised & non-specialised** | **Other building materials wholesaler; hardware store**

% of installers buying via...



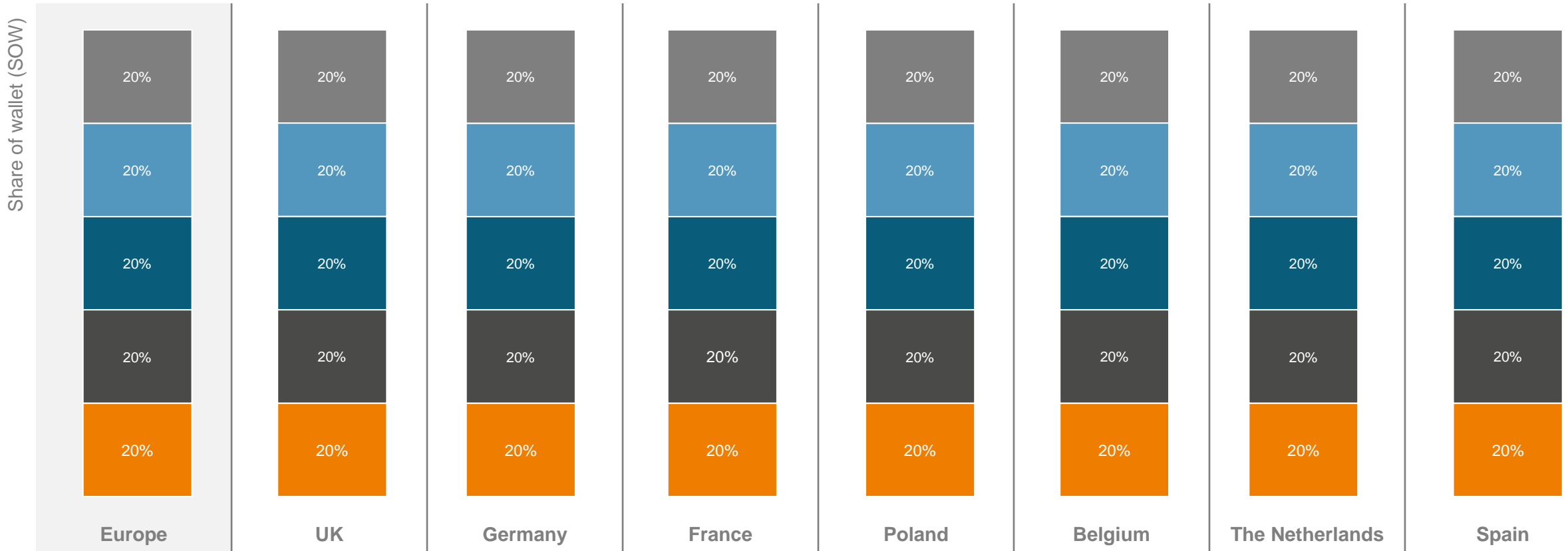
Base: n=xxx

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Distribution of total purchase among channels

Q: What share of your total purchase on installation-related products is done via...?

Manufacturer | **Wholesaler specialised** | **DIY specialised & non-specialised** | **Pure online specialised & non-specialised** | **Other building materials wholesaler; hardware store**



Base: n=xxx

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DUMMY DATA

Top-1 wholesaler/ manufacturer/ online shop per country

Q: Can you mention the name(s) of the wholesaler(s) at which you are doing most of your purchases? | Q: From which manufacturers do you buy products directly?

| Q: From which pure online shops have you bought installation products most often?

 Wholesaler	LOGO	LOGO	LOGO	LOGO	LOGO	LOGO	LOGO
 Manufacturer	LOGO	LOGO	LOGO	LOGO	LOGO	LOGO	LOGO
 Pure Online	LOGO	LOGO	LOGO	LOGO	LOGO	LOGO	LOGO
	UK	Germany	France	Poland	Belgium	The Netherlands	Spain

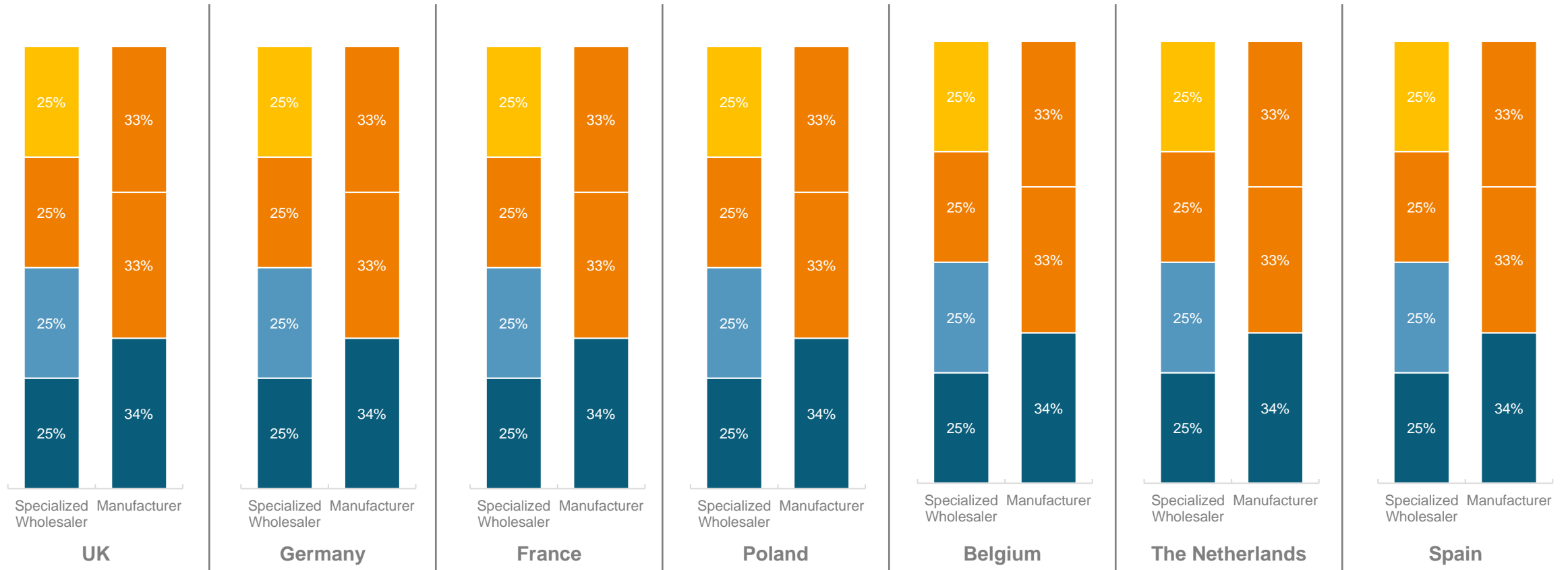
Base: n=xxx

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Way of ordering products (share of orders)

Q: Looking at the way you order the products you purchase from the traditional specialised installation wholesaler: what share of your total purchase is ordered... | Q: Looking at the way you order the products, you purchase directly from the manufacturers. What share of your total purchase there is done...

Traditionally (via phone, fax, e-mail, sales reps) | **Traditionally** (at the counter in the store) | **Online** (via the website, web shop, app) | **Via messaging apps**



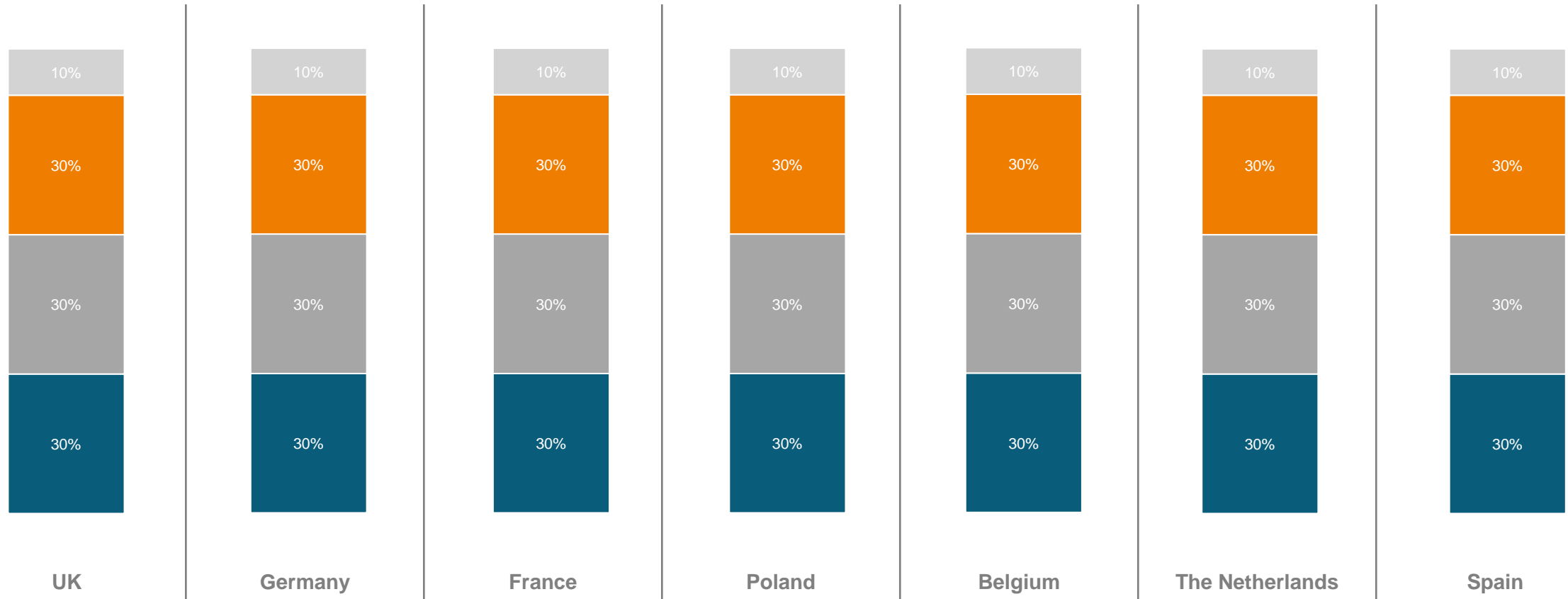
Base: n=xxx

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Purchases through manufacturers digital tools

Q: Do you use any digital tools from manufacturers of electrical products to place your order?/ If manufacturers offer the possibility to order directly from them via their online web shop, would you use that possibility?

Already using | Interested in using it | **Not interested in using it** | Don't know



Base: n=xxx, only those who buy via manufacturer

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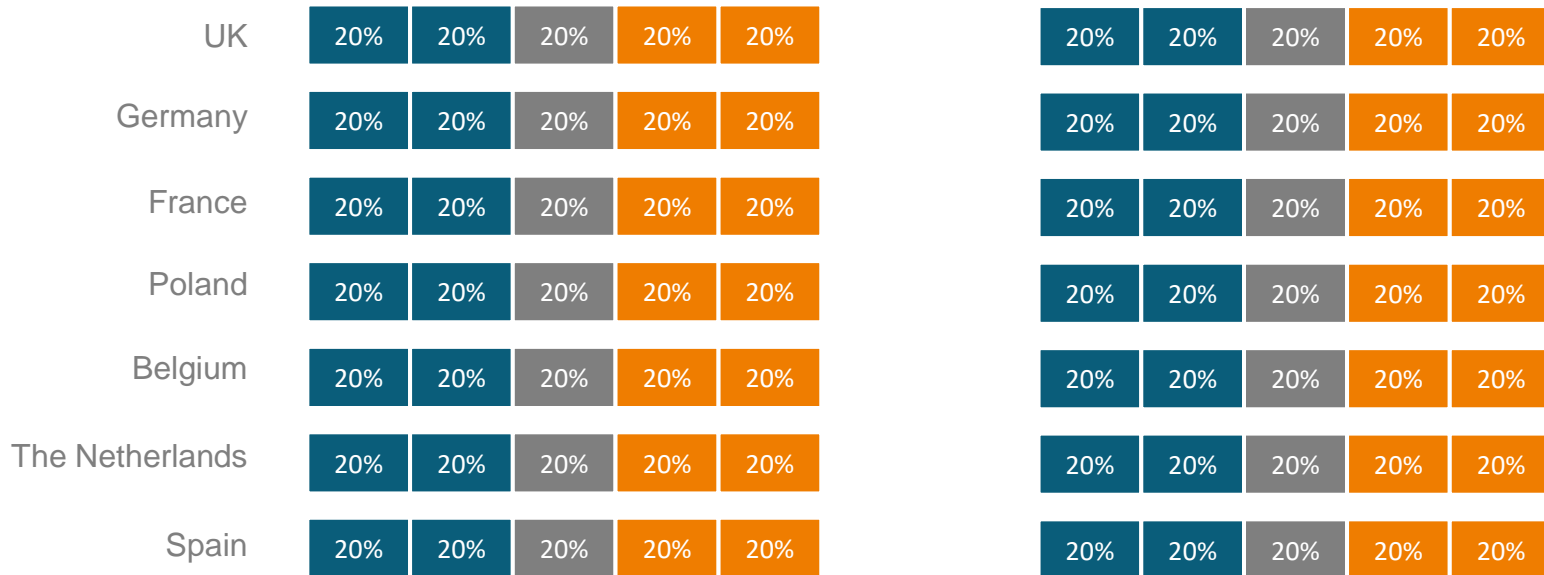
Installers' sentiment

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

'Due to the internet and the prices to be found there it is more difficult for us to make a profit on the products we install'

'In the next 5 years, I expect that our company will buy more and more installation products from pure online shops'

(Strongly) agree | Neutral | Disagree (strongly) | Dont' know



Base: n=xxx

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DUMMY DATA

Distribution of total purchase among channels

Q: Approximately what share of your total purchase (the money you spend) on installation related products for your daily job is being done via the following channels?

	% OF INSTALLERS USING THE CHANNEL		TOTAL MONEY SPENT PER CHANNEL (SOW)		
	40%	40%	SOW BY FTE (2023)		
			1 – 4 FTE	5 – 14 FTE	15 + FTE
Traditional specialised installation wholesaler	40%	40%	33%	33%	33%
Traditional building material wholesaler	40%	40%	33%	33%	33%
Traditional hardware store	40%	40%	33%	33%	33%
DIY store	40%	40%	33%	33%	33%
Directly from the manufacturer	40%	40%	33%	33%	33%
Pure online shop	40%	40%	33%	33%	33%

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Distribution of product group purchases across channels

Q: How would you divide your purchases on <product group> over the following channels?

	Directly from the manufacturer	Specialized electrical installation wholesaler	DIY stores	Pure online shops/ web shops	Other (building materials wholesale, hardware stores, etc.)
Power tools	20%	20%	20%	20%	20%
Electrical consumables (wires, cables, connectors, etc.)	20%	20%	20%	20%	20%
Lighting fixtures	20%	20%	20%	20%	20%
Home automation systems installations	20%	20%	20%	20%	20%
Electrical enclosures	20%	20%	20%	20%	20%
Switches & sockets outlets	20%	20%	20%	20%	20%

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Installation wholesaler

XX% buy at specialised wholesaler

Way of ordering products

Q: Looking at the way you order the products you purchase from the traditional specialized installation wholesale: what share of your total purchase is ordered...

Traditionally (phone, e-mail, sales reps) | **Traditionally** (at the counter) | **Online** (website, web shop, app) | **Via messaging apps** (WhatsApp, Viber, Telegram)



Top 5 wholesalers where most of the purchases are done

Q: Can you mention the name of the wholesaler(s) at which you are doing most of your purchases?



Base: n=xxx

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Way of getting ordered products

Q: Approximately what share of the products you order at the traditional specialized installation wholesale do you?:

Get products delivered | **Picked up at a local wholesale branch**



By FTE:

1-4 | 5-14 | 15+

50 | 50% | 50% | 50% | 50% | 50%

The average delivery time is **XX hours.**

Experience with delayed deliveries

(Very) rarely | **Ocasionally** | **(Very) frequently** | Don't know



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Manufacturer

XX% buy directly from manufacturers

Top 5 manufacturers where products are bought directly

Q: From which manufacturers do you buy products directly?



Base: n=xx

Way of ordering products directly at the manufacturer

Q: Looking at the way you order the products, you purchase directly from the manufacturers. What share of your total purchase there is done:

Traditionally (via phone, fax, e-mail, sales reps) | **Online** (via the website, web shop, app)



50% of installers who **order directly from manufacturers** are using **digital tools** for it.

By FTE:
1-4 | 5-14 | 15+

50% | 50% | 50%

50% of installers who are not already using digital tools for ordering would use them if **manufacturers offered such tools**.

By FTE:
1-4 | 5-14 | 15+

50% | 50% | 50%

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XX% buy at pure online shops

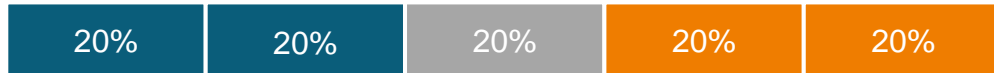
Pure Online

XX% at installation-specialized | XX% at non-specialized

Development share of online orders

Q: In the last 12 months, the share of purchase at pure online shops...

(Significantly) increased | Remained the same | Decreased (significantly) | Don't know



Top 5 pure online shops where products are directly bought

Q: From which pure online shops have you bought installation products most often?



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Installers' sentiment

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

(Strongly) agree | Neither agree nor disagree | (Strongly) disagree | Don't know

Due to the internet and the prices found there, it is more difficult for us to make a profit on the products we install



In the next 5 years, I expect that our company will buy more and more installation products from pure online shops



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Respondents' background characteristics

DUMMY DATA

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%

Q4 2023 data, unweighted

Questionnaire – theme questions

- Do you buy electrical installation products used in your daily job through the following channels?
- Approximately what share of your total purchase (the money you spend) on installation-related products for your daily job is being done via the following channels:
- Looking at the way you order the products you purchase from the traditional specialized installation wholesale: what share of your total purchase is ordered:
- In the last 12 months, has the share of your online orders at the traditional specialized installation wholesale
- Approximately what share of the products you order at the traditional specialized installation wholesale do you?
- Within how many hours are the products normally delivered to you?
- Can you mention the name of the wholesaler(s) at which you are doing most of your purchases?
- Let's imagine you are searching for a product from a certain brand, but your usual wholesaler does not have that brand at the moment. What will you do?
- Are you interested in buying your electrical and plumbing/ HVAC equipment both from the same distributor?
- Looking at the way you order the products, you purchase directly from the manufacturers. What share of your total purchase there is done:
- In the last 12 months, has the share of your purchases directly from the manufacturer:
- Why has the share of your purchases directly from the manufacturer increased?
- From which manufacturers do you buy products directly? Please mention all manufacturers you can think of:

Questionnaire – theme questions

- In the next couple of years do you expect that the share of your online purchases directly from the manufacturers will:
- If manufacturers offer the possibility to order directly from them via their online web shop, would you use that possibility?
- Now I would like to ask you some questions about the pure online shops. In the last 12 months, has the share of your purchase at pure online shops:
- What are the main reasons for you to buy via pure online shops?
- From which pure online shops have you bought installation products most often?
- What are the main reasons for not buying at pure online shops?
- What type of installation products do you usually buy at pure online shops?
- What do you get annoyed by, in your overall shopping experience?
- Where do you usually buy the following types of products:
- What types of projects are you mainly working on when buying direct or online?
- What kind of installation products do you buy in DIY stores?
- Why do you buy at DIY stores instead of specialist installation wholesale?

Questionnaire – theme questions

- To what extent do you agree or disagree with the following statements?
 - Due to the Internet and the prices to be found there it is more difficult for us to make a profit on the products we install
 - I would like to be able to buy all I need for my work directly from the manufacturers
 - In the next 5 years, I expect that our company will buy more and more installation products from pure online shops
 - In the next 5 years more and more installation wholesalers will start selling products for both electrical installers and HVAC installers

About USP

USP Marketing Consultancy



Head office



Subsidiary



Rotterdam



Düsseldorf



Market specialist
installation, construction, home improvement and real estate

Dedicated and multi-client research

Active in the market for over 25 years

230+ dedicated market research projects annually

Revenue distribution



Research in **34** countries annually



78 focus groups



1,162 in-depth interviews



58,653 B2B CATI interviews



56,750 B2C online interviews



What we do

Examples



Segmentation



**Customer
journey**



Branding



**Concept/
product
research**



**Customer
satisfaction**



Trends



**Distribution
research**



**Market
exploration**



Pricing



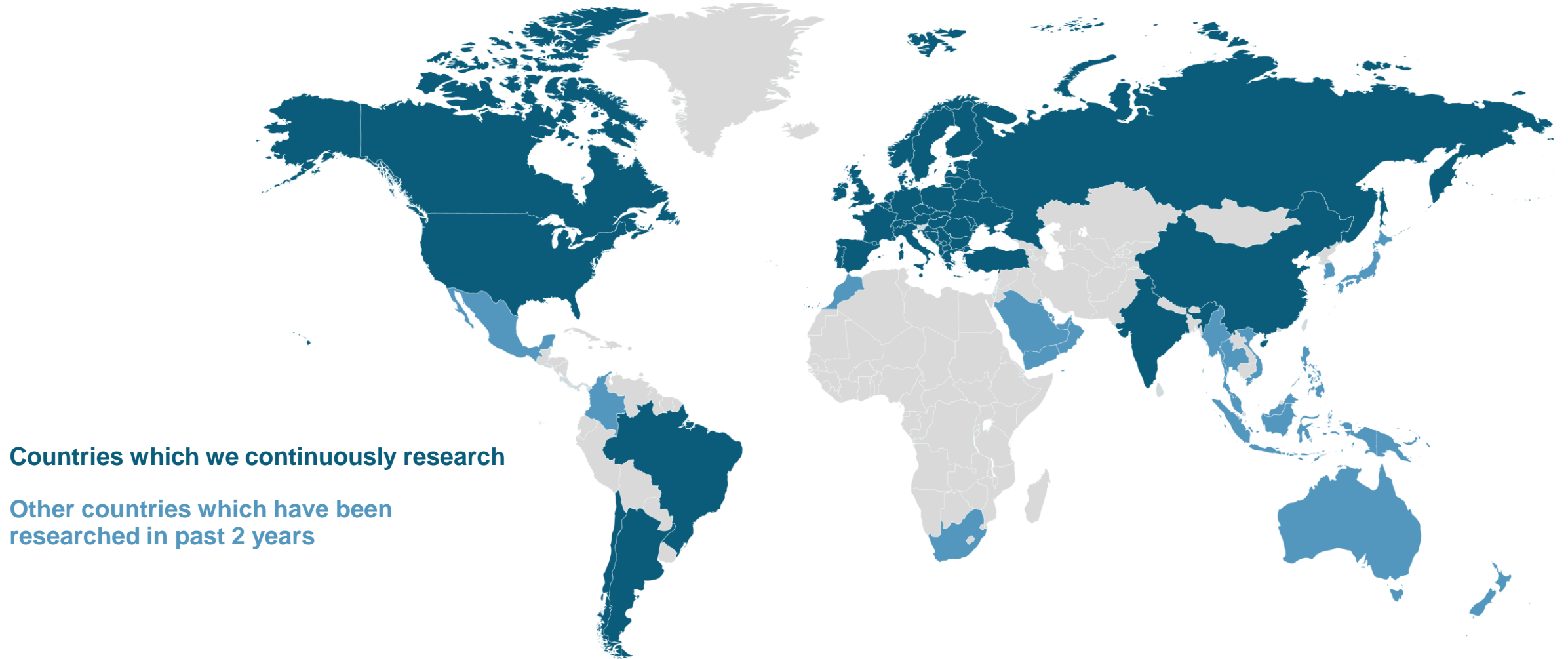
**Market
size**



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.


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
VIESSMANN							
							
							

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	5,800 interviews	2,050 interviews	3,200 interviews	3,800 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
2020 Theme topics	<ul style="list-style-type: none"> • Q1: Media orientation & consumption • Q2: Shifts in building methods • Q3: City of the future • Q4: Circularity & sustainability 	<ul style="list-style-type: none"> • H1: Circularity & sustainability • H2: Decision-making 	<ul style="list-style-type: none"> • Q1: BIM & calculation tools • Q2: Prefab • Q3: DMU • Q4: Media orientation & consumption 	<ul style="list-style-type: none"> • Q1: Electrification • Q2: Certification & circularity • Q3: Services in installation sector • Q4: Pricing 	<ul style="list-style-type: none"> • Trend tracking • Sustainability • Labour shortage • Online buying • Future expectations • Innovation needs 	<ul style="list-style-type: none"> • Q1: Orientation & smart homes • Q2: Purchase channels • Q3: Branding (A vs. Private) • Q4: DIFM vs. DIY

USP Marketing Consultancy

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