

# European Mechanical Installation Monitor Q4 2023

Training needs

February 2024

A product by

**USP** Marketing Consultancy

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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 700 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:**

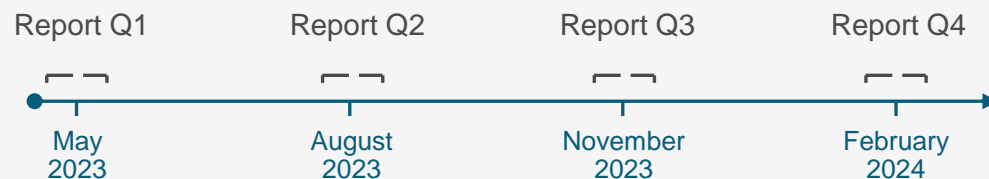
Q1: Sustainability

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](#)

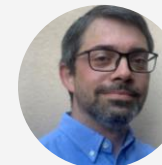


## PROJECT TEAM



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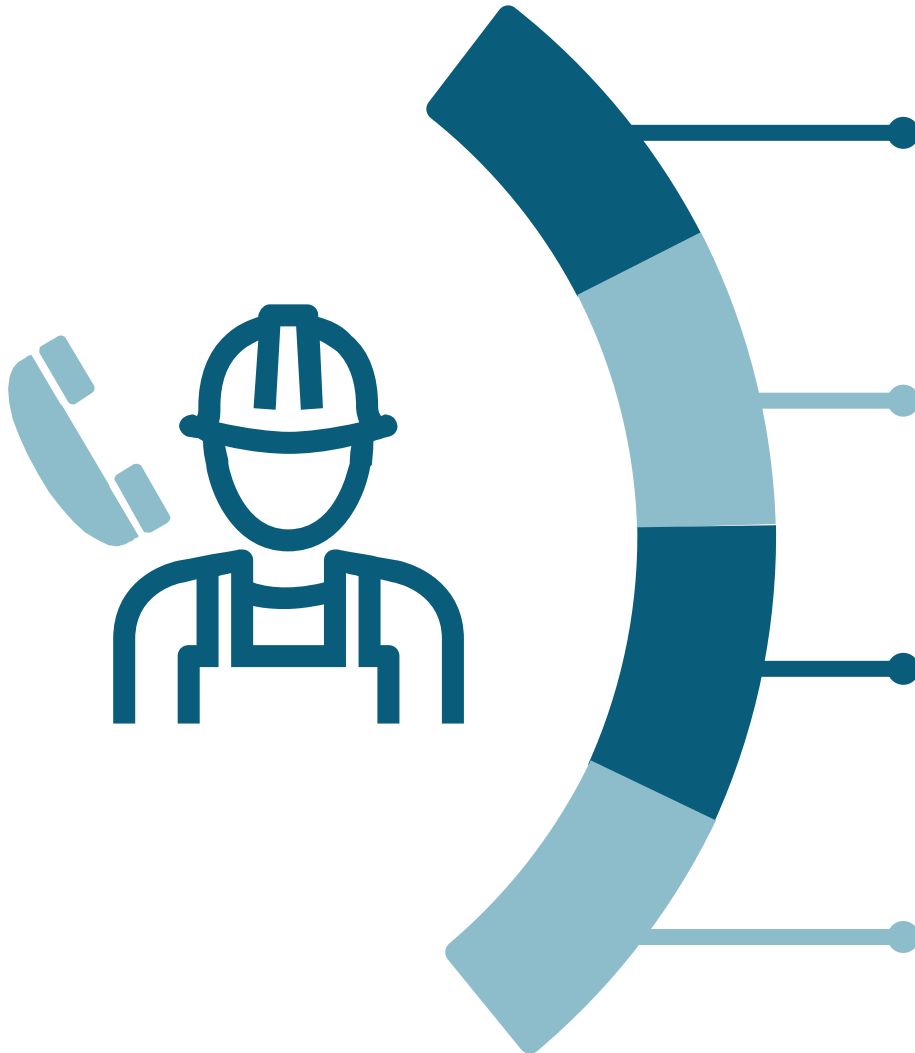
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# About target group & methodology



## 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 Q4 theme topic



## **TRAINING NEEDS in the installation sector...**

This chapter will give insight into installers' experiences with training courses in the past year and their training needs for the future. 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, who are often a source of training, to understand installers' training needs.

## **...helps to understand installers' experiences with training courses and their future training needs**

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

- The way of attending trainings and future expectations
- Training preparations
- Preferred ways of training
- Relevant training topics and preferred settings
- The best timing for trainings
- Certification
- Labour shortage

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# Key takeaways



## Business Development

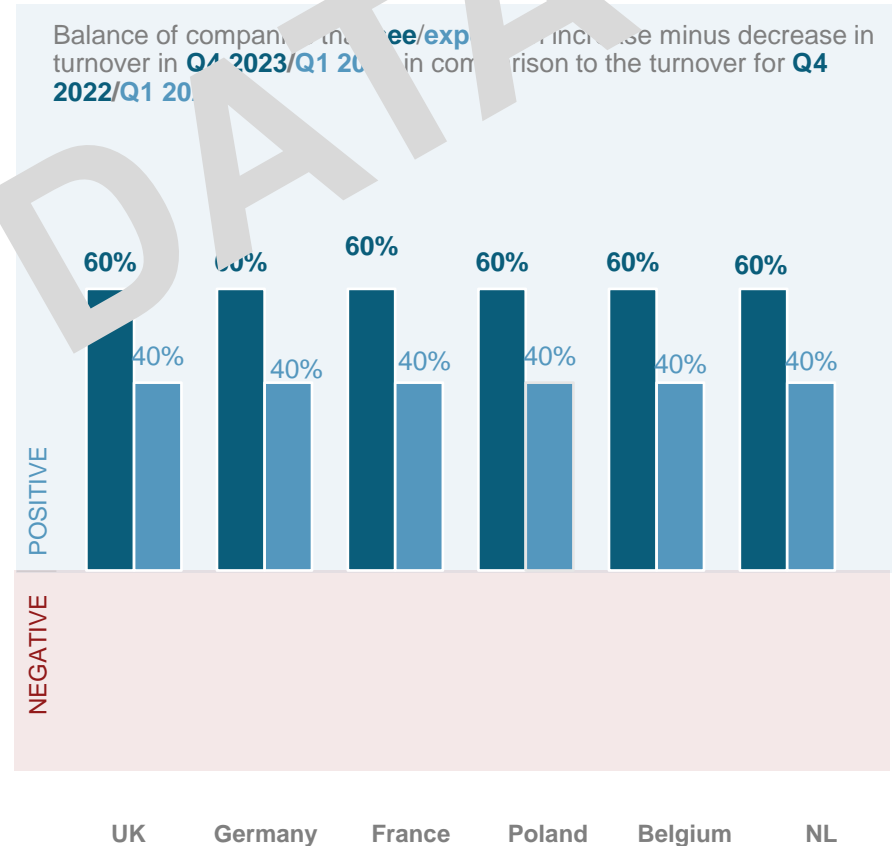
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## Turnover balance of installers Q4 2023 and Q1 2024



# Key takeaways

## 2

### Theme: Training needs

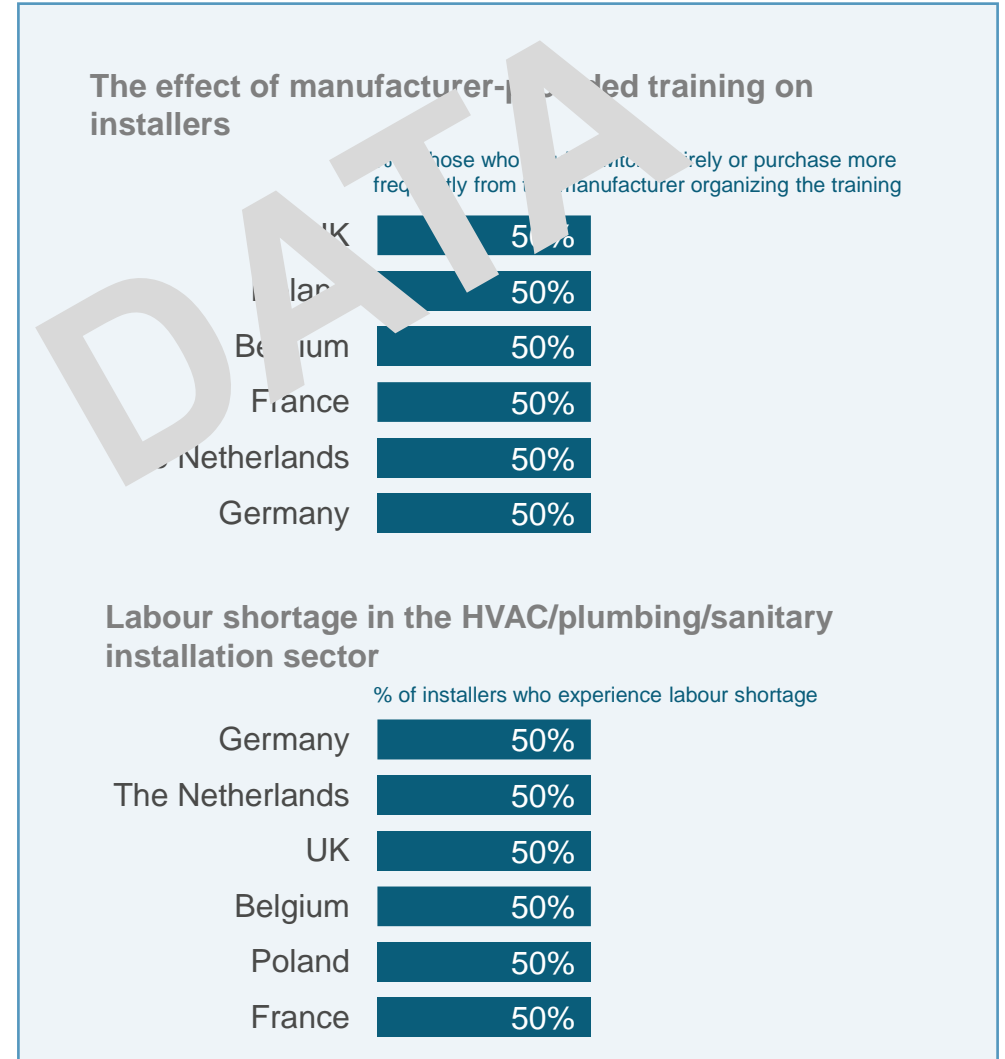
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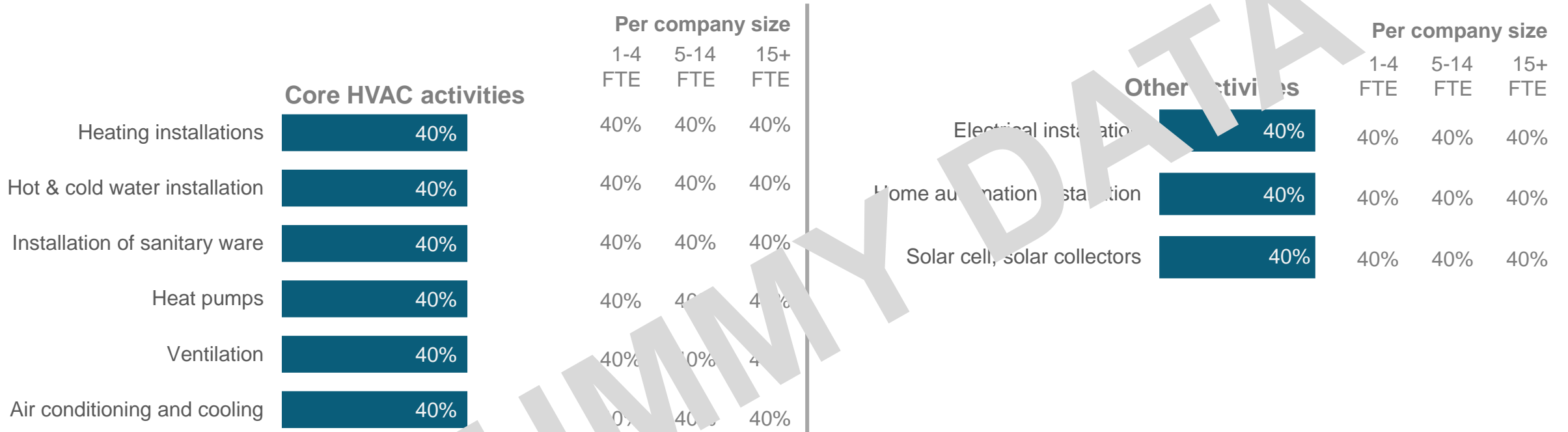
### Core HVAC activities

Which of the following installation activities does your company perform?

	UK	Germany	France	Poland	Belgium	Netherlands
<i>Sample size</i>	125	125	125	100	100	100
Heating installations	50%	50%	50%	50%	50%	50%
Hot & cold water installation	50%	50%	50%	50%	50%	50%
Heat pumps	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	100	100	100
Electrical installation	50%	50%	50%	50%	50%	50%
Solar cell, solar collectors	50%	50%	50%	50%	50%	50%
Home automation installation	50%	50%	50%	50%	50%	50%



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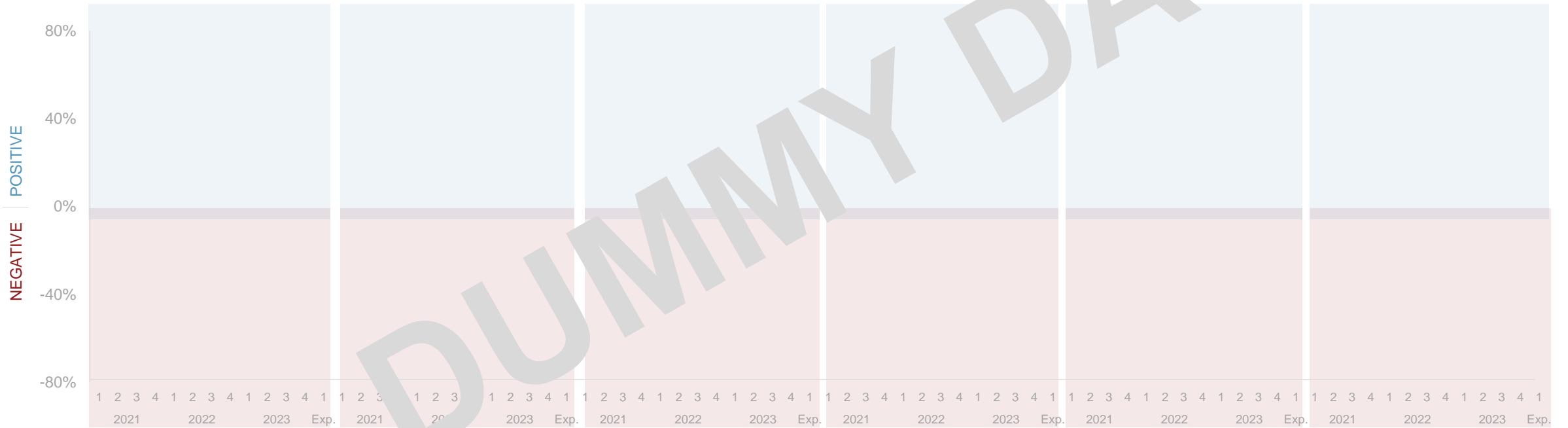
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### Turnover outlook last quarters and expectations for Q1 2024

TURNOVER BALANCE

(% INCREASE minus % DECREASE)

— COMPARISON SAME QUARTER LAST YEAR



Quarter

The United Kingdom

Germany

France

Poland

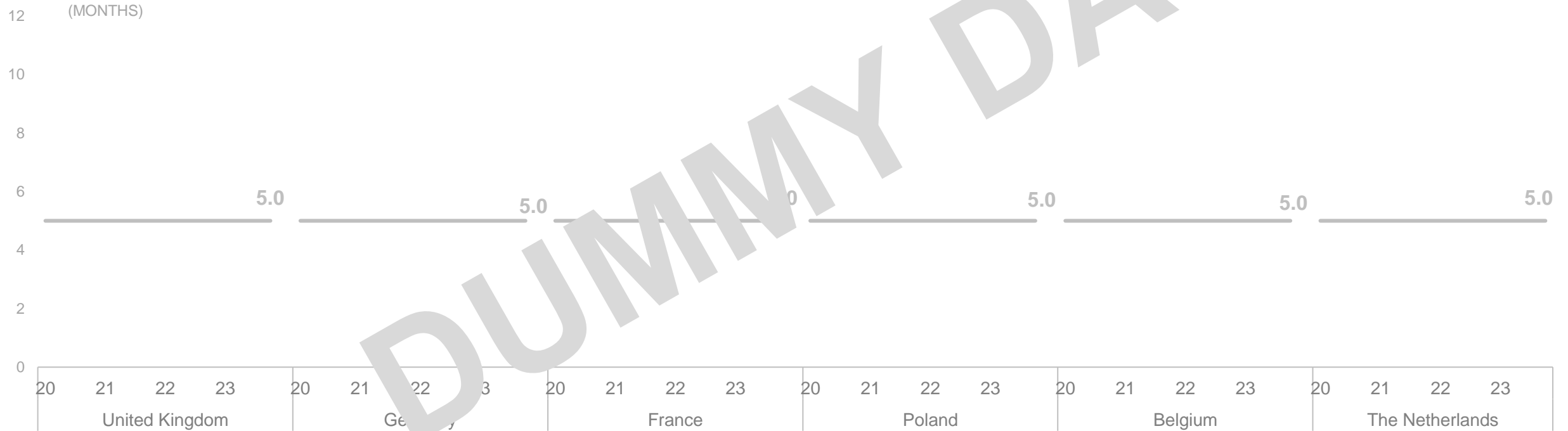
Belgium

The Netherlands

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### Order book portfolio

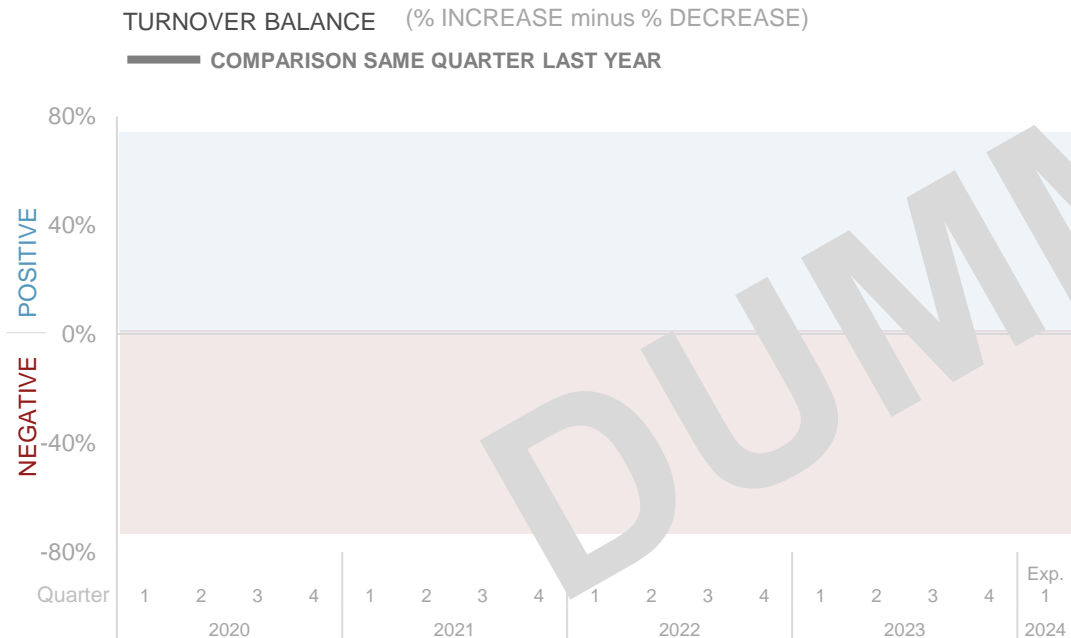
How big is your current order book portfolio? For how many months will you be able to keep your current staff working?



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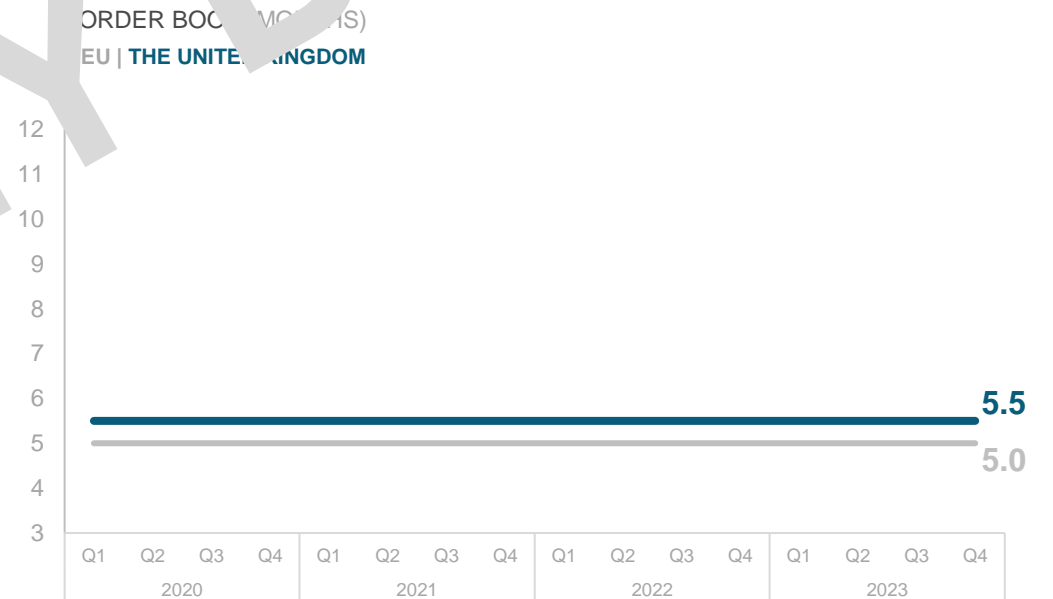
### Turnover outlook

If you compare your turnover of Q4-23 to Q4-22, how did your turnover develop?  
What are your expectations for the development in Q1-24?



### Order book portfolio

How big is your current order book portfolio?

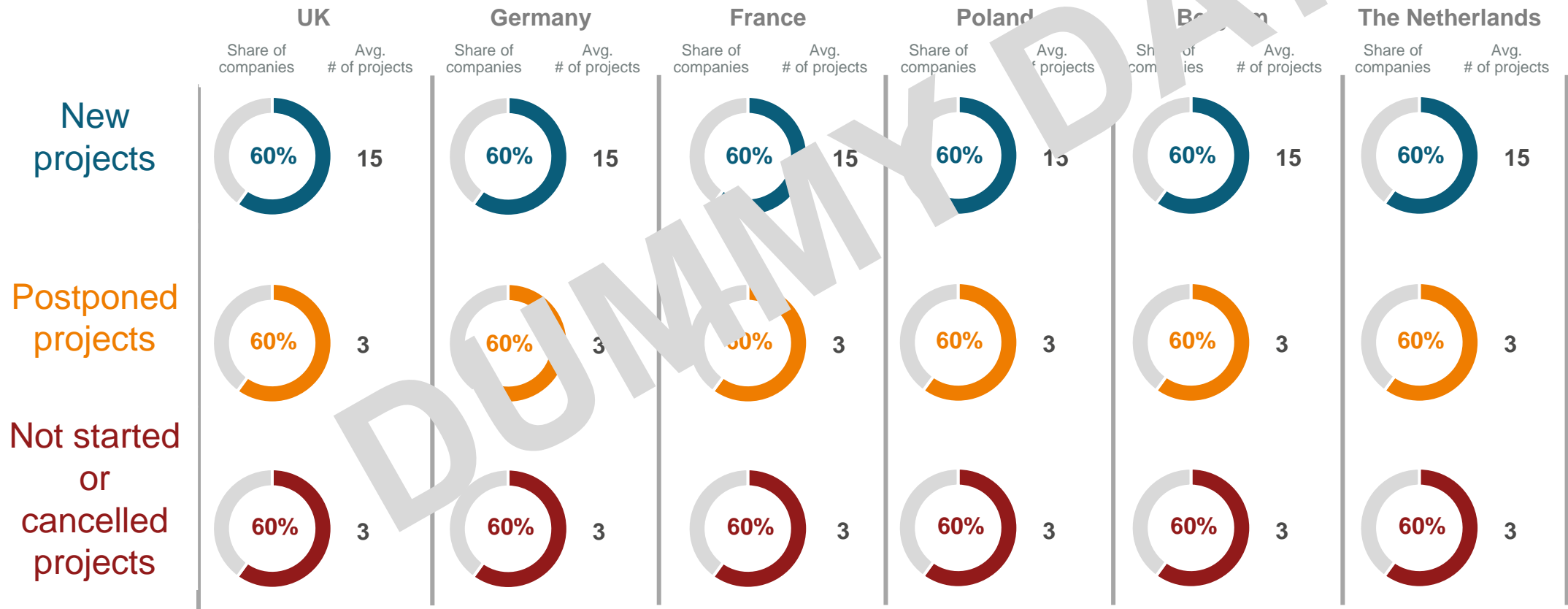




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### Number of projects in Q4 2023

How many new projects has your company scored/ been commissioned in Q4 2023? How many projects have been postponed in Q4 2023? In Q4 2023, how many projects were not started and cancelled?



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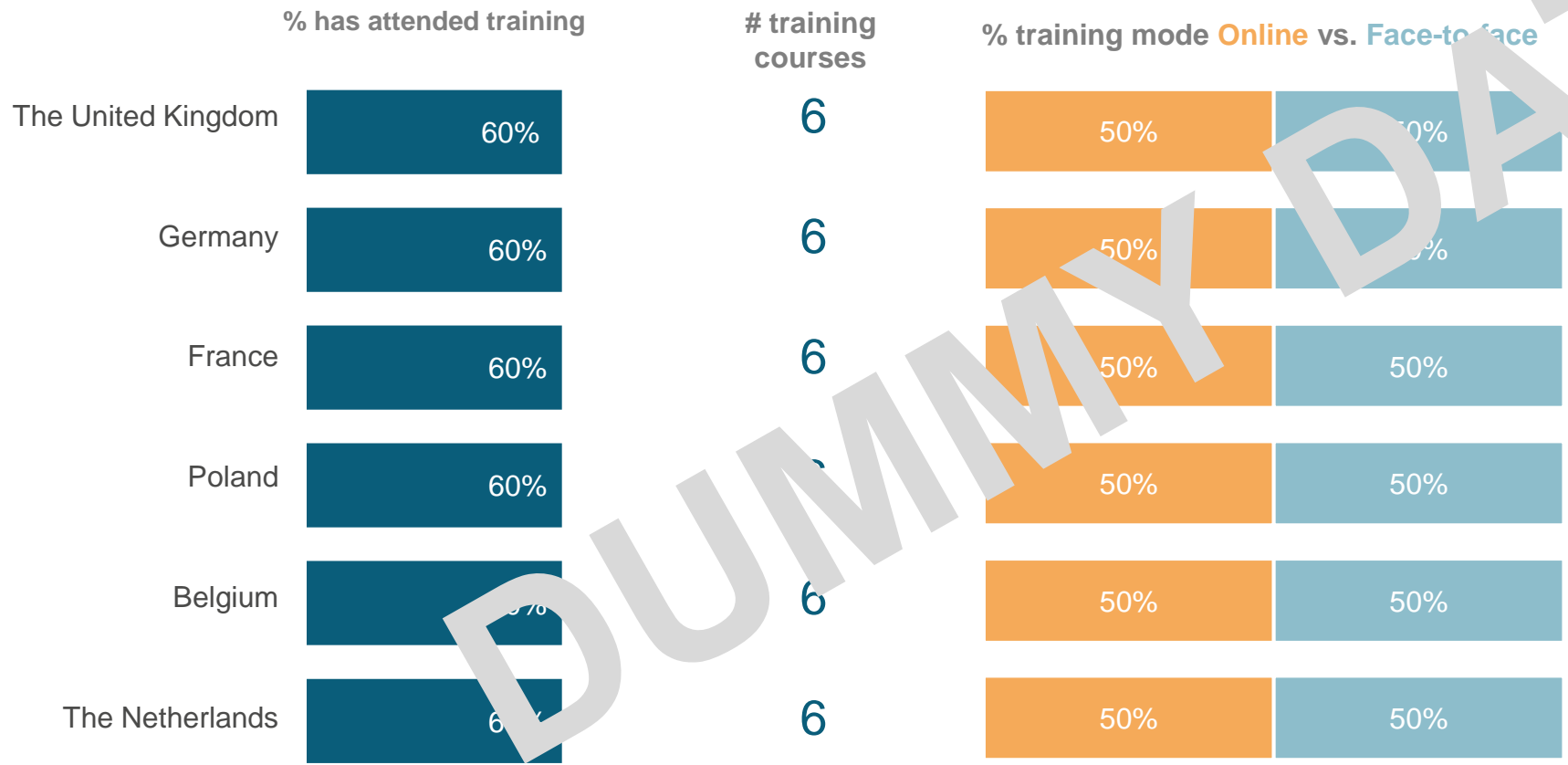
The Netherlands

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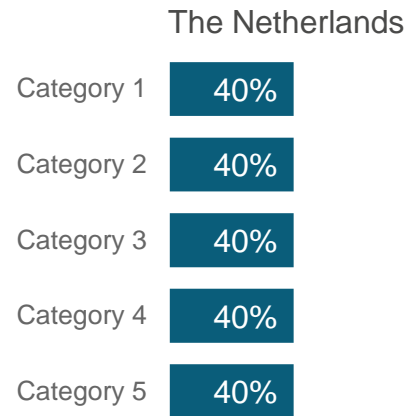
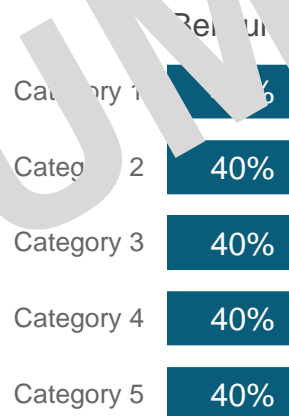
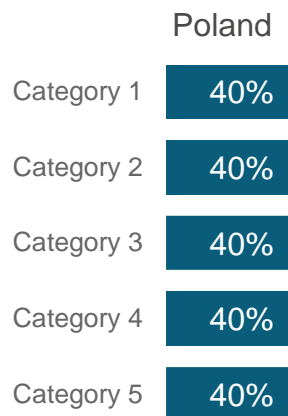
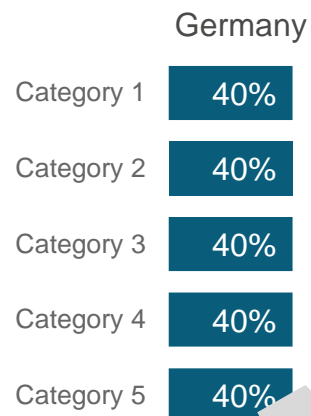
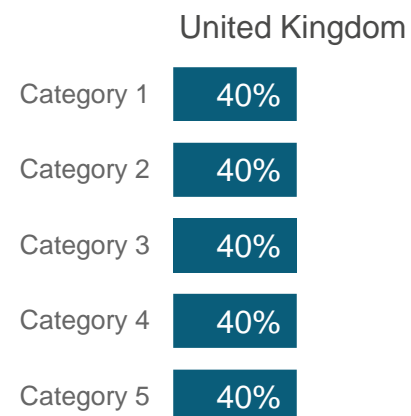
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Key facts about trainings in 2023



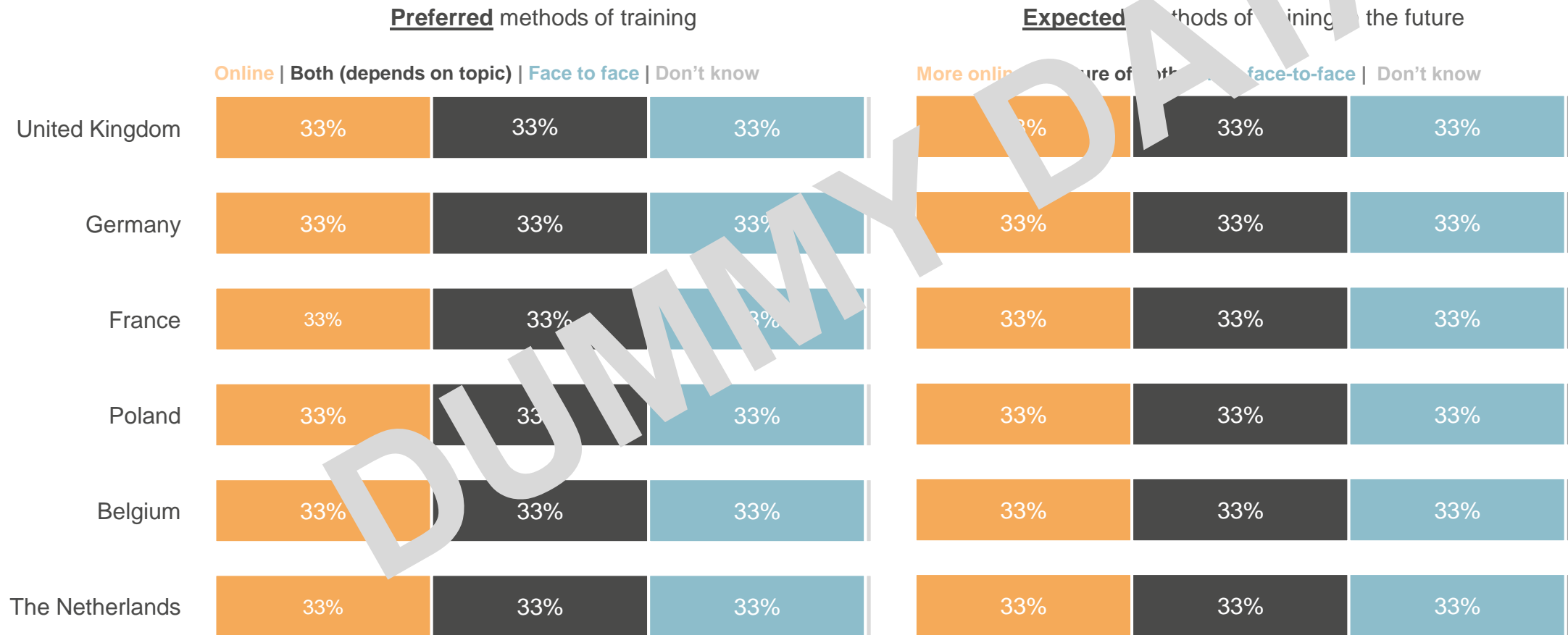
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Plumbing and HVAC product categories installers typically seek/ attend training – Top 5



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Preferences and expected changes regarding training methods



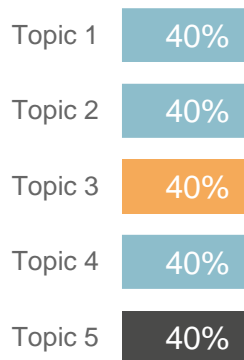
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Best topics for trainings – Top 5

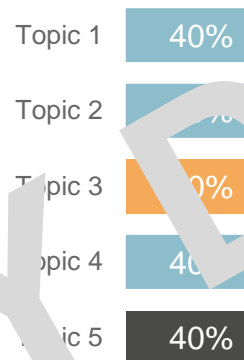
Bar colours legend:

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

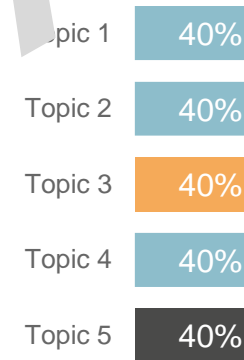
United Kingdom



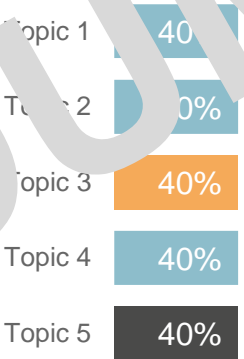
Germany



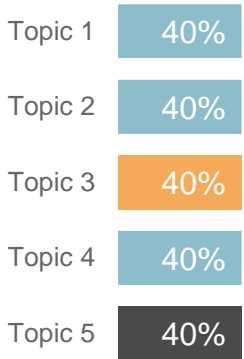
France



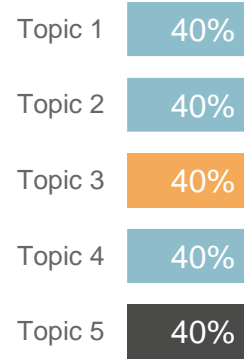
Poland



Belgium

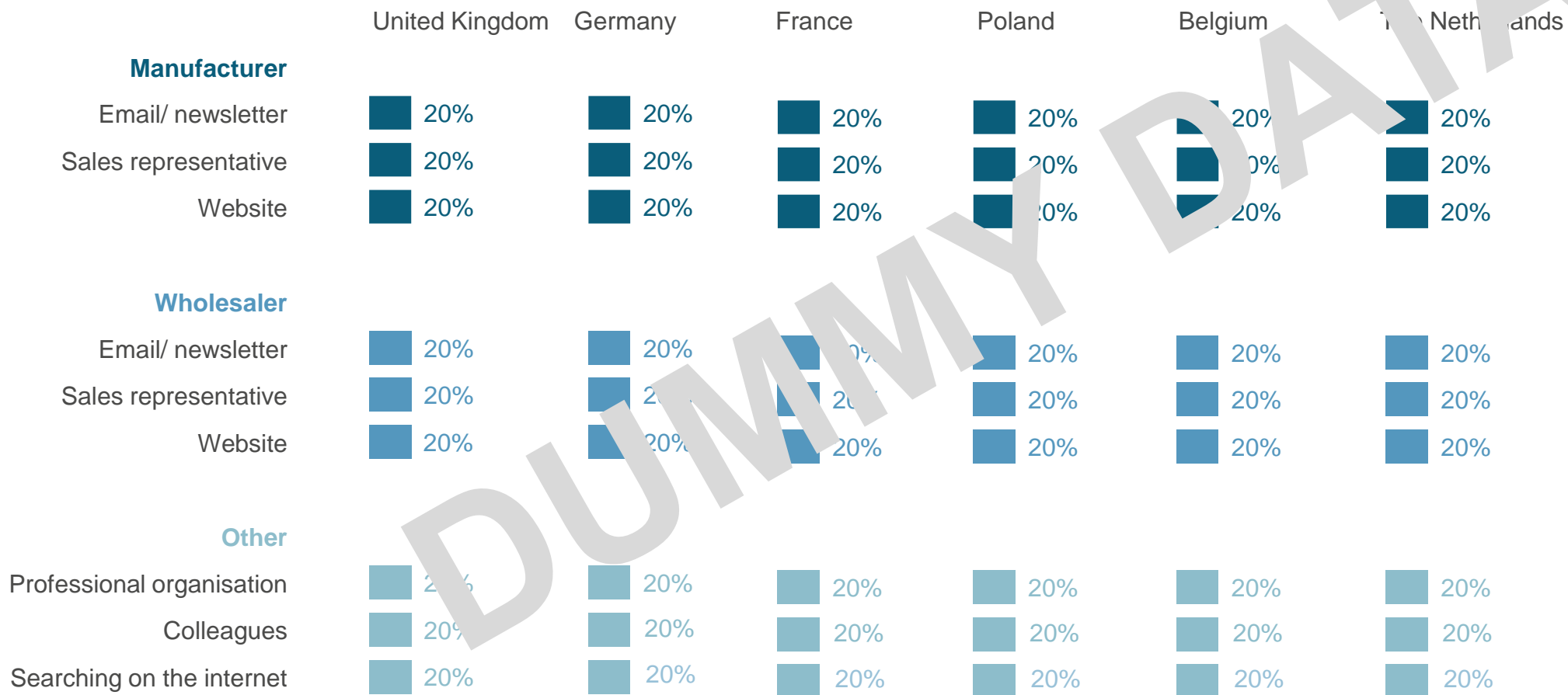


The Netherlands



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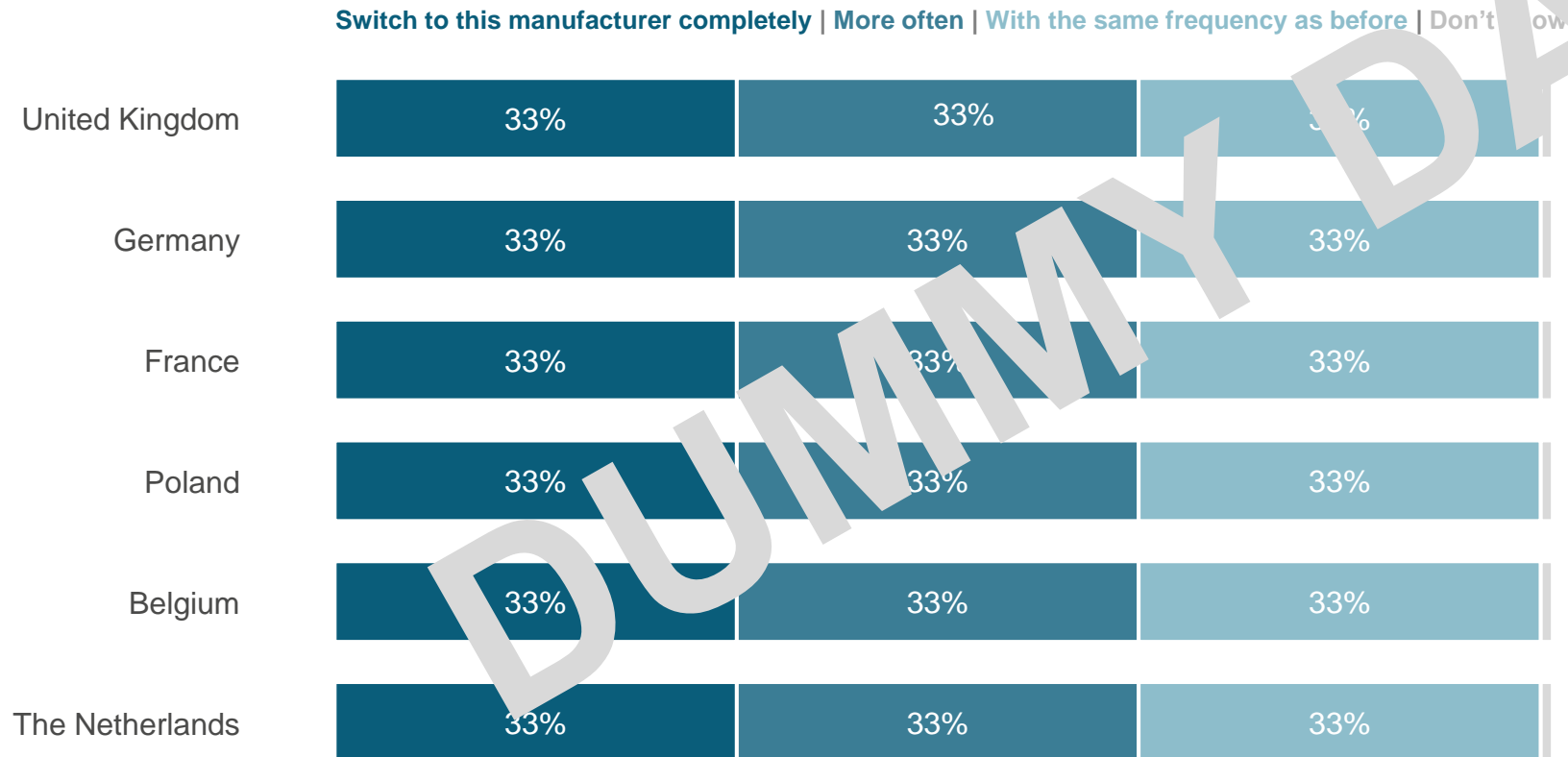
Ways of getting information about trainings





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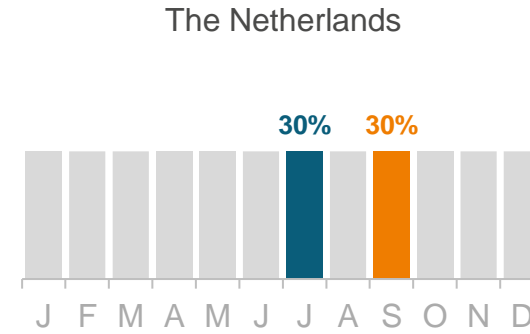
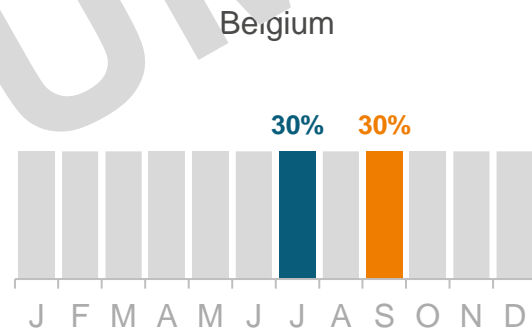
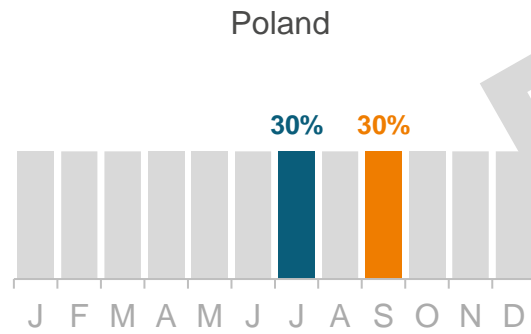
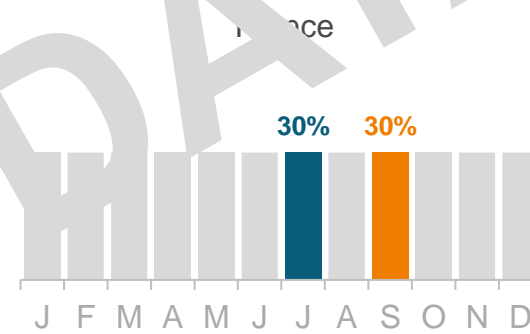
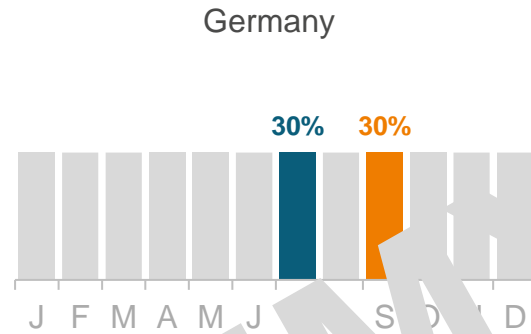
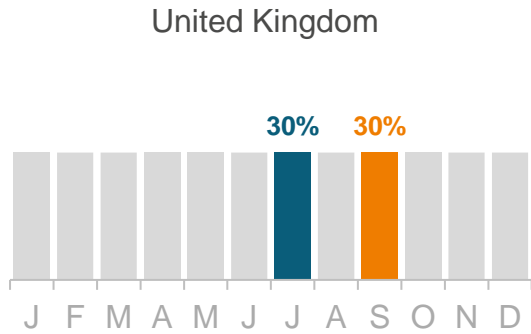
Change of interest in installing manufacturers' products after attending a manufacturer provided special training



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Timings for trainings in general

Best | Worst month for training



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Labour shortage in the HVAC/plumbing/sanitary installation sector

**% of installers experiencing labour shortage**

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

**UK**

50% experience labour shortage

50% expect labour shortage

**Belgium**

50% experience labour shortage

50% expect labour shortage

**France**

50% experience labour shortage

50% expect labour shortage

**Poland**

50% experience labour shortage

50% expect labour shortage

**Poland**

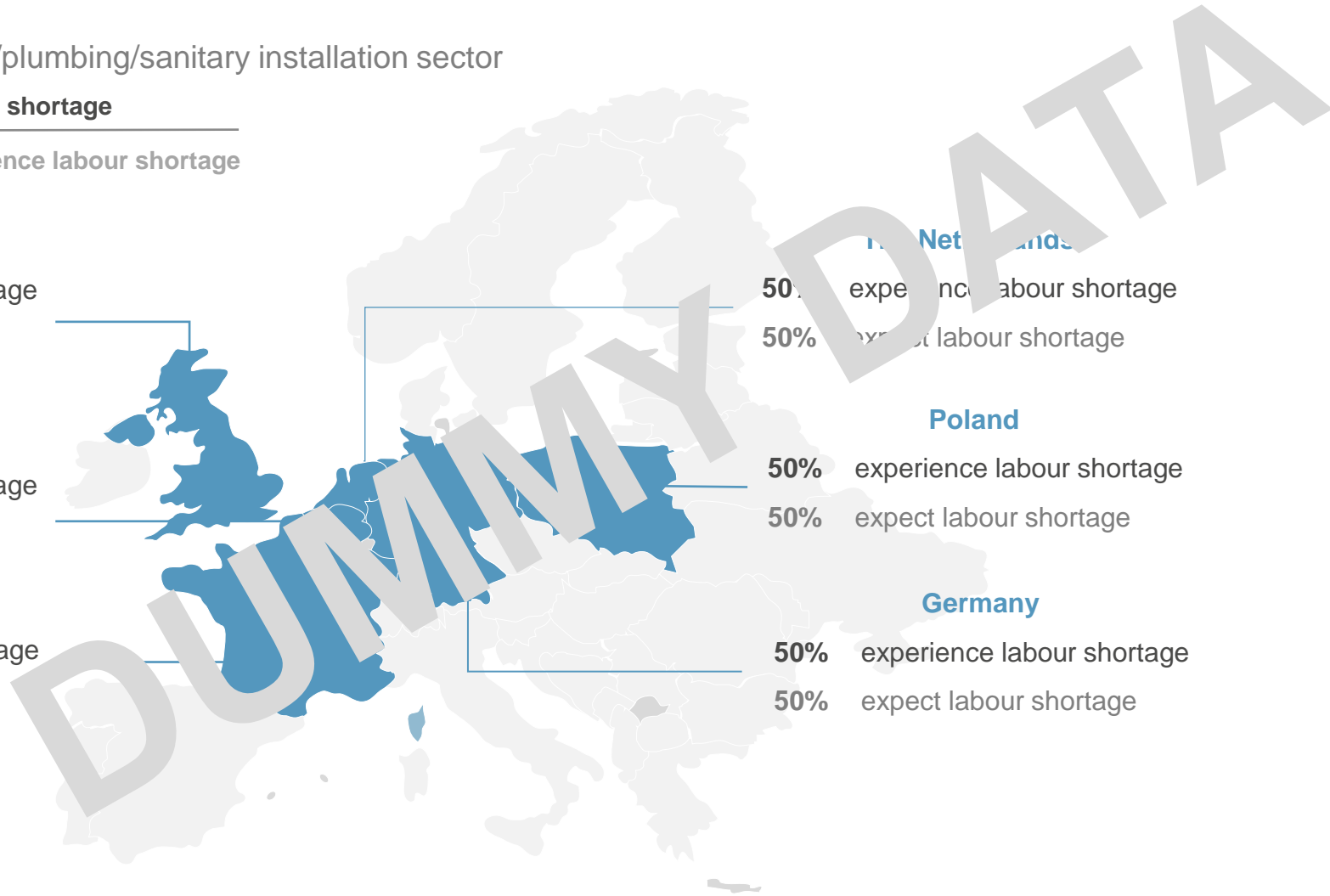
50% experience labour shortage

50% expect labour shortage

**Germany**

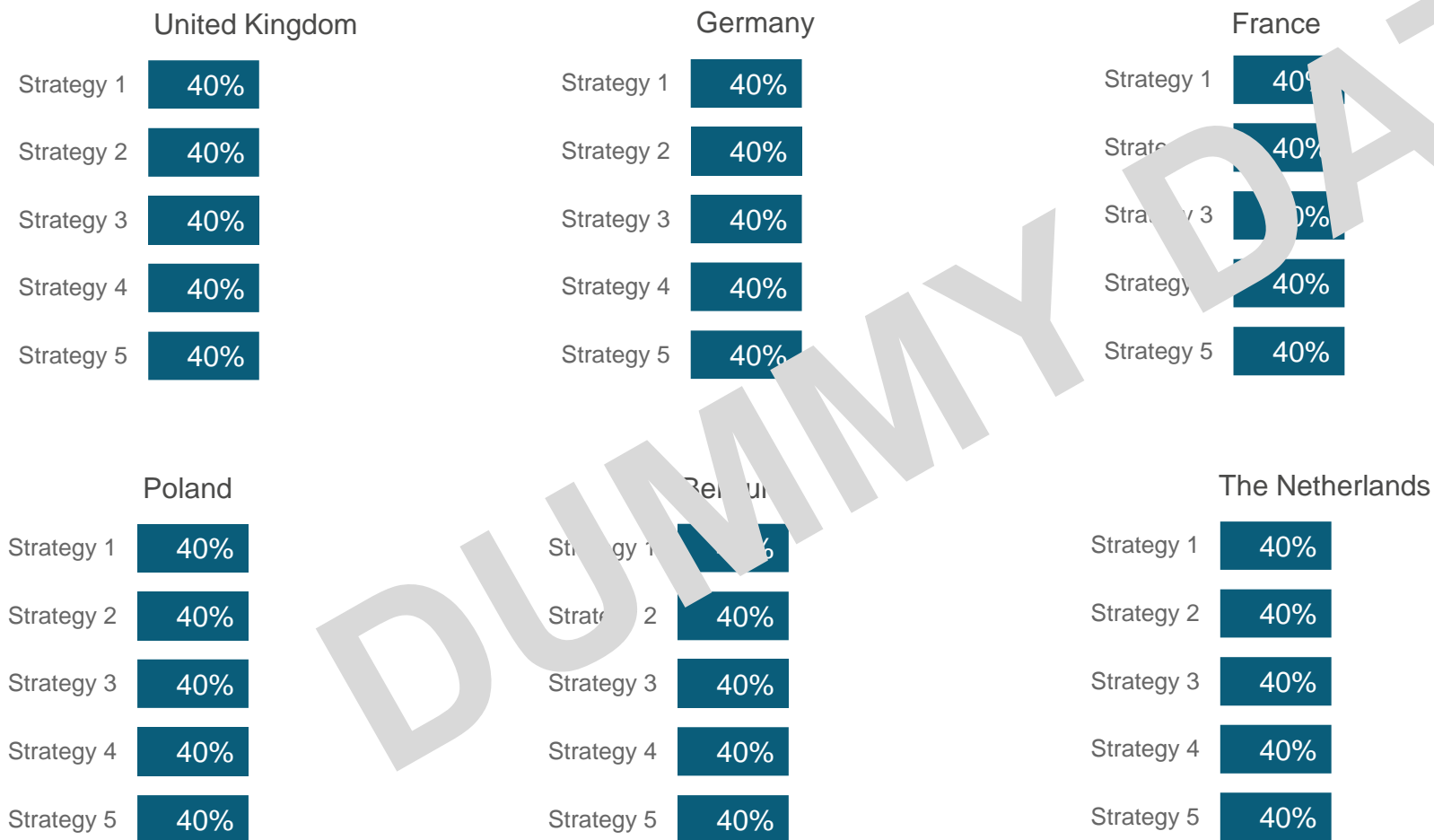
50% experience labour shortage

50% expect labour shortage



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Addressing labour shortages: expected future strategies of HVAC installers and plumbers – Top 5



Base: if expecting labour shortage

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Attended training in 2023  
% attending training courses in 2023

Yes | No/ Don't know



BY FTE (% yes):

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

Base: n=125, all

Training courses in 2023:



20 days spent on training

10 courses attended



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

Base: n=98, if attended trainings

Attending training in HVAC product categories - Top 10

For which plumbing and HVAC product categories does your company normally seek/attend training?

DUMMY DATA

	Per company size		
	1-4 FTE	5-14 FTE	15+ FTE
Boilers, water heaters	50%	50%	50%
Heat pumps	50%	50%	50%
Gas/Gas safety	50%	50%	50%
Air conditioning	50%	50%	50%
Ventilation	50%	50%	50%
Plumbing tools	50%	50%	50%
Pipes and fittings	50%	50%	50%
Pumps for water circulation	50%	50%	50%
Pumps for pressure boosting or waste water	50%	50%	50%
Radiators	50%	50%	50%

Base: n=125, all

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### Share face-to-face versus online trainings in 2023

What share of the training you/ your employees attended in 2023 was online/ digital training and what share was face-to-face training?



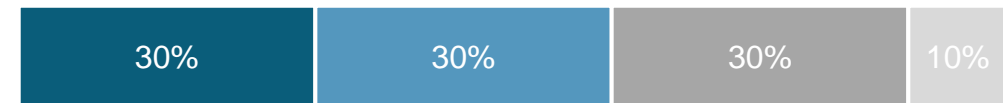
Base: n=98, if attended trainings

### Training organisers

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



Base: n=95, if attended face-to-face trainings



Base: n=56, if attended an online training

DUMMY DATA

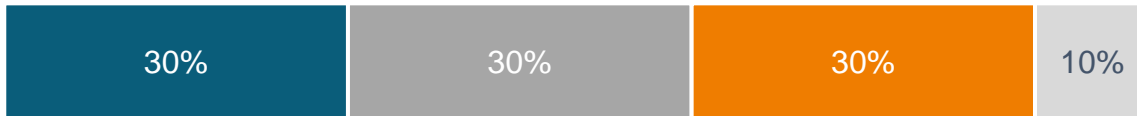


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### Number of trainings in 2023 versus 2022

Looking at 2023 has the number of training courses increased/ decreased or stayed the same compared to 2022?

Increased | Remained the same | Decreased | Don't know



Base: n=125, all

### Share of online training in 2023 versus 2022

Has the share of online/digital training you/ your employees attended in 2023 increased, decreased, or remained the same in comparison with 2022?

Increased (substantially, slightly) | Remained the same | Decreased (substantially, slightly)



Base: n=56, if attended an online training

### Plans for attending training in 2024

% attending training courses in 2024

Yes | No | Don't know



BY FTE (% yes):

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

The most mentioned reasons for not attending training in 2024:

- (1) Lorem ipsum dolor sit amet
- (2) Lorem ipsum dolor sit amet

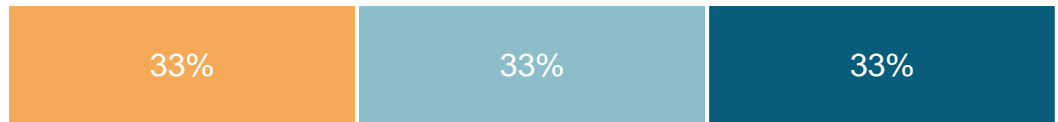
Base: n=125, all

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### Preferred ways of training – Online vs. face-to-face

Both digital and face-to-face training have their advantages and disadvantages. But does your company have a strong preference for any of these two ways of training?

Online | Face-to-face | Both | Don't know

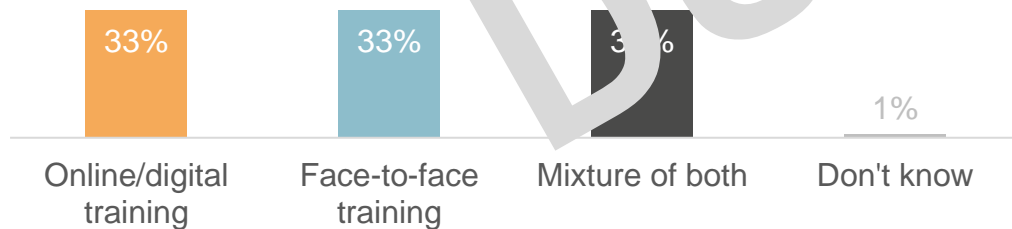


50% of UK installers have heard of mixed learning concepts (a combination of face-to-face and online training).

### Expectations of the way to attend training in the future

Do you expect the way you attend training in the future to be...

More ...



Base: n=125, all

### Most preferred ways of training in general

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

	Per company size		
	1-4 FTE	5-14 FTE	15+ FTE
<b>Manufacturer</b>			
Face-to-face training at manufacturer premises	50%	50%	50%
Face-to-face on the job site training	50%	50%	50%
Face-to-face training at own premises	50%	50%	50%
Online training/ webinars	50%	50%	50%
<b>Wholesaler</b>			
Training at wholesaler by one manufacturer	50%	50%	50%
Training at wholesaler by multiple manufacturers	50%	50%	50%
Online training/ webinars by wholesaler	50%	50%	50%
<b>Other</b>			
Mix of online/ digital and face-to-face training	50%	50%	50%
Tutorials – on demand training	50%	50%	50%
On site training via mobile devices	50%	50%	50%

Base: n=125, all

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### Preferred ways of organising training

How does your company prefer and organise training?

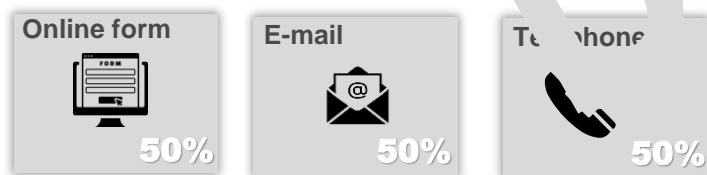
#### Per company size

1-4 FTE    5-14 FTE    15+ FTE

Method	1-4 FTE	5-14 FTE	15+ FTE
<b>Ad hoc face-to-face training</b> when needed with manufacturer or wholesaler	50%	50%	50%
<b>Structured training programme</b> planned with timeline and training goals	50%	50%	50%
<b>Ad hoc online/ digital training</b> offered to employees when needed with "always on" online training material	50%	50%	50%
<b>Online self-study</b> planned by each employee when they need information	50%	50%	50%

### Ways of booking – Top 3

How do you normally book a training?



Base: n=125, all

### Ways of getting information about the training

How do you normally get the information about training?

#### Per company size

1-4 FTE    5-14 FTE    15+ FTE

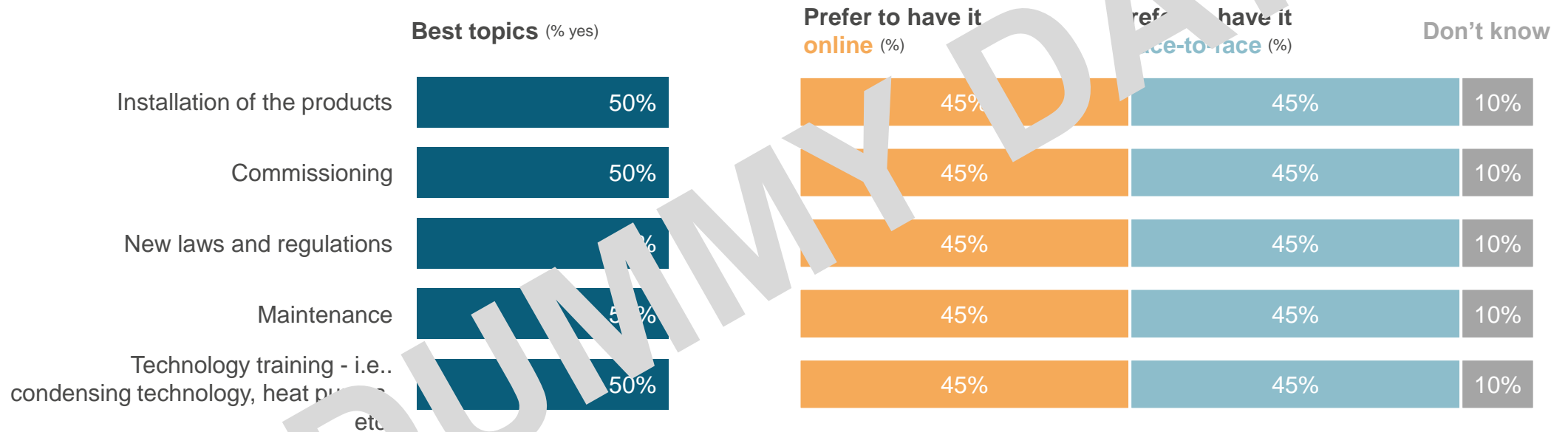
Method	1-4 FTE	5-14 FTE	15+ FTE
Via sales rep wholesaler	50%	50%	50%
Via email/ newsletter manufacturer	50%	50%	50%
Professional organisation	50%	50%	50%
Internet search	50%	50%	50%
Via the website of the manufacturer	50%	50%	50%
Via sales rep wholesaler	50%	50%	50%
Via email/ newsletter wholesaler	50%	50%	50%
Colleagues	50%	50%	50%
Via the website of the wholesaler	50%	50%	50%

Base: n=125, all

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### Best topics for training – Top 5

What would be the best topics for training for you and/ or the people in your company to increase the level of knowledge? For which of those topics would your company prefer to have online/ digital training and for which face-to-face training?

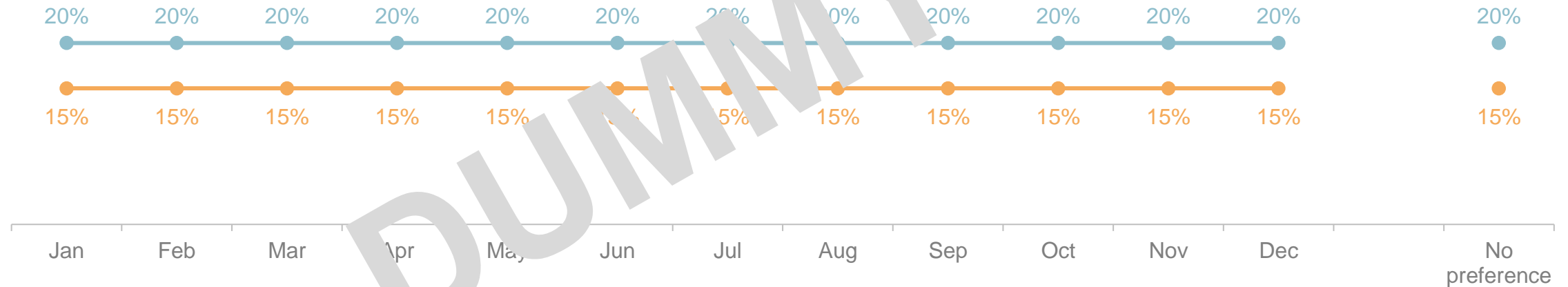


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### Best time of the year for training

What is the best time of the year when you prefer online/ face-to-face training to be organised?

Online | Face-to-face

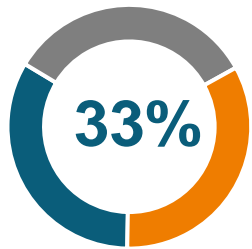


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### Interest in becoming a certified manufacturer's installer

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

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%

### Change of interest in installing manufacturers products

If you attend special training provided by a manufacturer, do you think you will 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=125, all

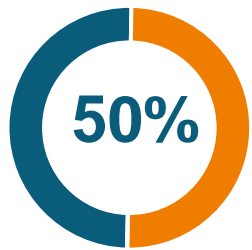
Base: n=125, all

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### Experience of labour shortage

Does your company experience a shortage of labour (professional HVAC installers or plumbers) in your own work practice?

Yes | No / don't know



#### By FTE (% Yes)

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

50% of UK installation companies expect a labour shortage in the coming five years

Base: n=125, all

### Dealing with the labour shortage – Top 5

What do you expect HVAC installers and plumbers will do to deal with the labour shortage in the coming years?

		Per company size		
		1-4 FTE	5-14 FTE	15+ FTE
Hire non-qualified staff and educate them	50%	50%	50%	50%
Ask for higher prices	50%	50%	50%	50%
Co-operate with self-employed / independent installers	50%	50%	50%	50%
More training / education in schools	50%	50%	50%	50%
Hire installers from other countries	50%	50%	50%	50%
Subcontract	50%	50%	50%	50%

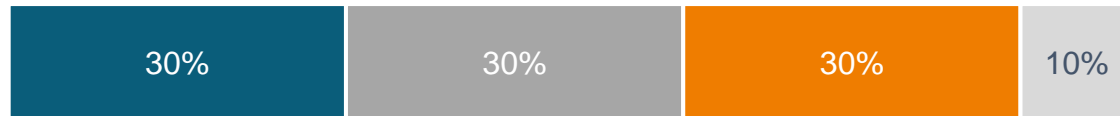
Base: n=58, if expecting labour shortage

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### Expectations of the labour shortage influence on training needs

In your opinion how will the labour shortage influence the training needs of your company? Do you expect the number of training courses you will need to:

Increase | Remain the same | Decrease | Don't know



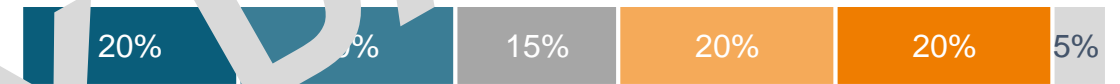
Base: n=77, if experiencing or expecting labour shortage

### Manufacturers' and suppliers' involvement with labour shortage

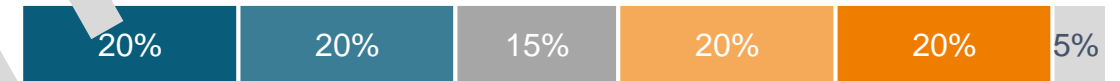
To what extent do you agree that manufacturers and suppliers to the installation industry should focus more on ...?

Strongly agree | Agree | Neutral | Disagree | Strongly disagree | Don't know

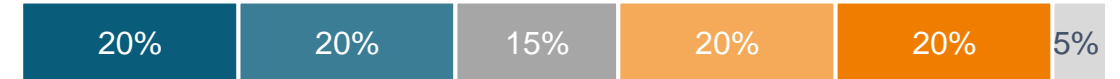
#### Trainings and installations of their products



#### More plug & play or quick installation solutions for their products



#### More installation support for specific tasks



Base: n=125, all



# Index

About European Mechanical Installation Monitor

Key takeaways

Profile of the Mechanical installer

Business development

Theme topic – Training needs

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

What is your position within the company?

Yourself included, how many full-time employees does your company have in total, in all branches?

	UK	Germany	France	Poland	Belgium	Netherlands
Owner / Director/ Manager	33%	33%	33%	33%	33%	33%
Calculator	33%	33%	33%	33%	33%	33%
Project manager	33%	33%	33%	33%	33%	33%
Plumber/ installer	33%	33%	33%	33%	33%	33%
Buyer/purchaser	33%	33%	33%	33%	33%	33%
Engineer/designer	33%	33%	33%	33%	33%	33%
Senior buyer/ purchaser	33%	33%	33%	33%	33%	33%
Other	33%	33%	33%	33%	33%	33%
1 - 4 FTE	33%	33%	33%	33%	33%	33%
5 - 14 FTE	33%	33%	33%	33%	33%	33%
15+ FTE	33%	33%	33%	33%	33%	33%

# 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 30 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



# Single client research

## Examples



**Segmentation**



**Customer  
journey**



**Branding**



**Concept/  
product  
research**



**Customer  
satisfaction**



**Trends**



**Distribution  
research**



**Market  
exploration**



**Pricing**










**Market  
size**



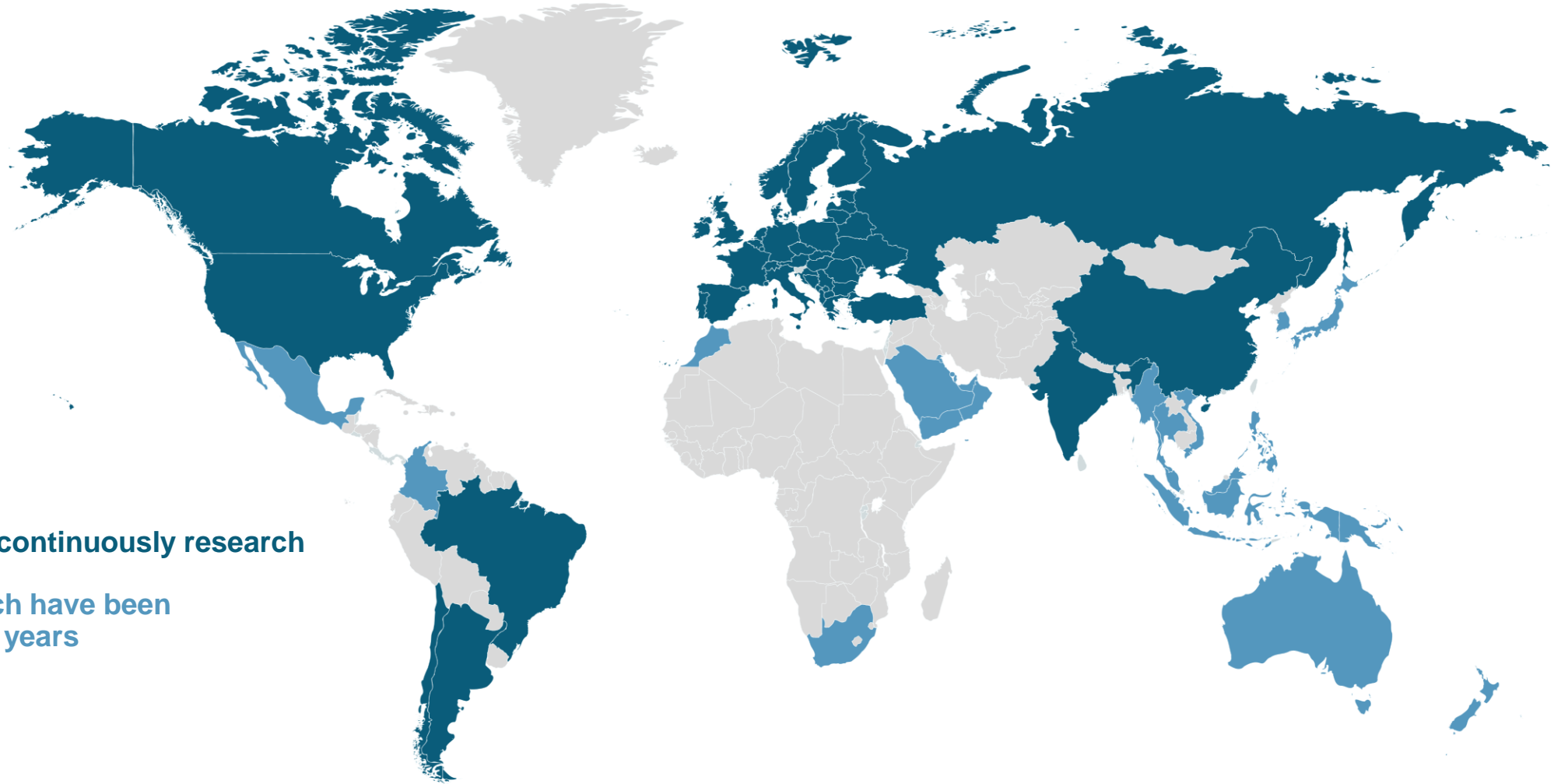
## Dedicated market research

- 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
<b>Target group</b>	Architects	Building contractors	HVAC installers	Electrical installers	Professional painters	Consumers	Handyman
<b>Methodology</b>							
<b>Annual sample size</b>	3,400 interviews	2,050 interviews	2,600 interviews	3,000 interviews	2,300 interviews	26,400 interviews	3,400 interviews
<b>Country scope</b>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> <li>• Spain</li> <li>• Italy</li> </ul>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> <li>• Spain</li> <li>• Italy</li> </ul>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> </ul>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> <li>• Spain</li> </ul>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> <li>• Spain</li> <li>• Italy</li> <li>• Denmark</li> <li>• Sweden</li> </ul>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> <li>• Spain</li> <li>• Italy</li> </ul>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• United Kingdom</li> <li>• France</li> <li>• Netherlands</li> <li>• Belgium</li> <li>• Poland</li> <li>• Spain</li> <li>• Italy</li> </ul>
<b>Way of reporting</b>	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly	Annually
<b>2023 Theme topics</b>	<ul style="list-style-type: none"> <li>• Q1: Media orientation</li> <li>• Q2: BIM</li> <li>• Q3: Prefab</li> <li>• Q4: Sustainability</li> </ul>	<ul style="list-style-type: none"> <li>• H1: Purchase channels</li> <li>• H2: Sustainability</li> </ul>	<ul style="list-style-type: none"> <li>• Q1: Sustainability</li> <li>• Q2: Services</li> <li>• Q3: Purchase channels</li> <li>• Q4: Training needs</li> </ul>	<ul style="list-style-type: none"> <li>• Q1: Media orientation</li> <li>• Q2: Training needs</li> <li>• Q3: BIM</li> <li>• Q4: Purchase channels</li> </ul>	<ul style="list-style-type: none"> <li>• Trend tracking</li> <li>• Brand funnels</li> <li>• Purchase channels</li> </ul>	<ul style="list-style-type: none"> <li>• Q1: Orientation; sustainability</li> <li>• Q2: Purchase Channels; online performance of DIY stores</li> <li>• Q3: Branding; private labels</li> <li>• Q4: DIY vs DIFM; plans for 2024</li> </ul>	<ul style="list-style-type: none"> <li>• Segmentation</li> <li>• Orientation and media usage</li> </ul>

# 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

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