



European Electrical Installation Monitor Q1-2024

Theme topic: Sustainability

April-2024

A product by **USP** Marketing Consultancy

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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 six 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 2024:

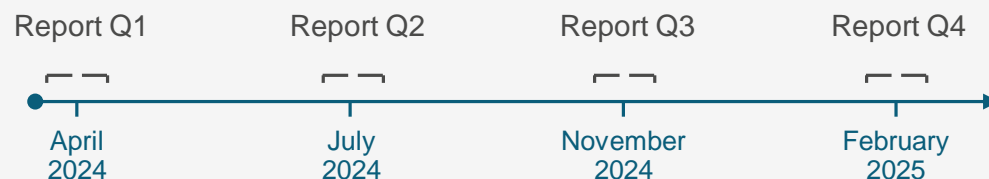
Q1: Sustainability

Q2: Smart buildings

Q3: Services in the installation market

Q4: Branding

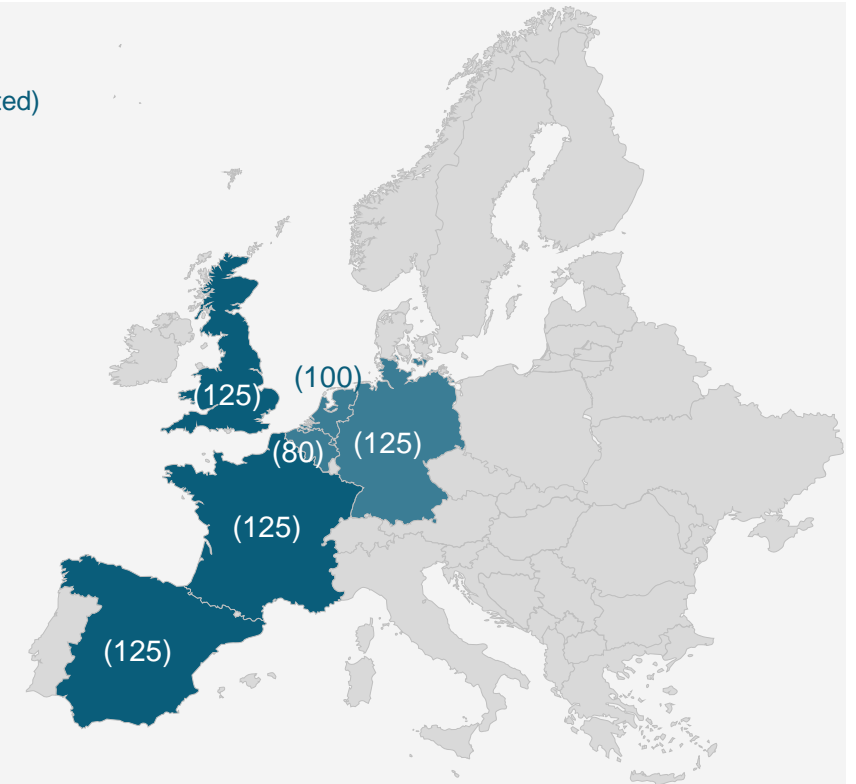
THE TIMELINE



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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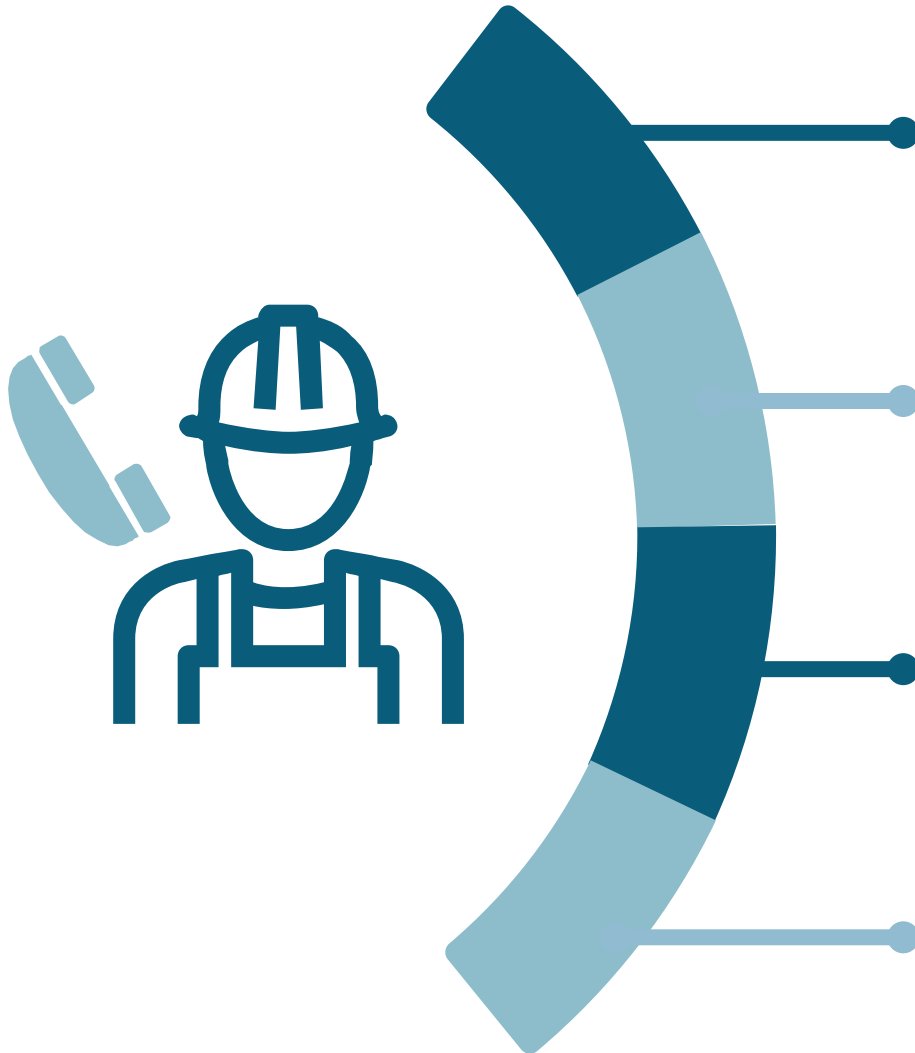
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Research consultant

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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 Q1 theme topic



Surveying the Sustainability topic...

The construction sector is one of the most resource-consuming sectors. In the last decade, several initiatives have been made to encourage the construction industry to support the agenda of sustainable development. However, the pace of change in each country differs.

The role of installation systems can contribute enormously to constructing sustainable buildings and reducing CO2 emissions.

...allows for better understanding of installers' role and attitude towards sustainable solutions

This report aims to help manufacturers of electrical installation products understand installers' attitudes towards a sustainable construction and installation industry. This is essential for their designing of products and solutions, as well as to target the right stakeholders and to encourage them to deliver a more sustainable building environment.

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

- Sustainability concept:
 - Installers' perception of sustainability/ sustainable solutions;
 - Contribution of various products/ solutions to creating sustainable buildings;
 - Clients' requests and willingness to pay for sustainable solutions;
- Current status of sustainable projects;
- Leaders in sustainable solutions.

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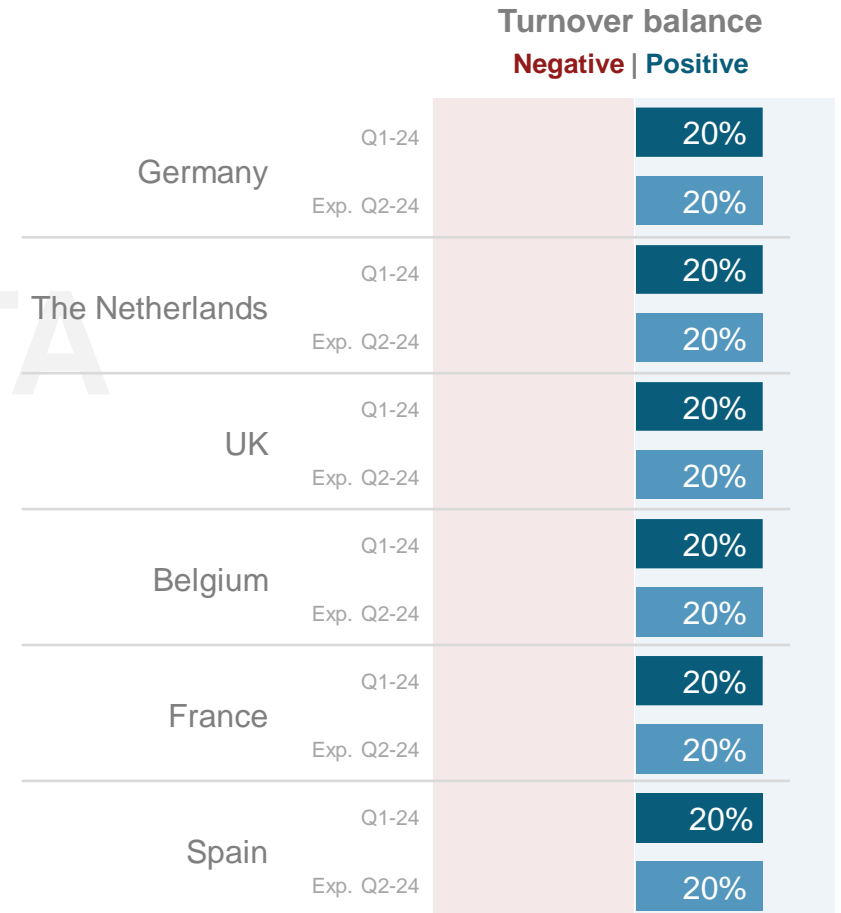


Business Development

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DUMMY DATA



Key takeaways

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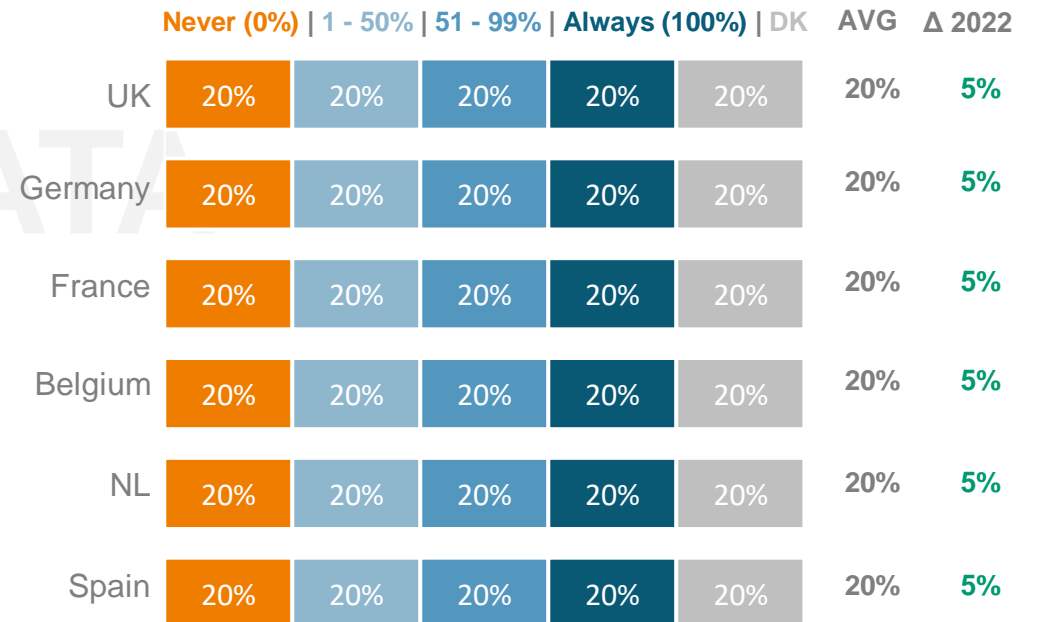
Challenges towards a sustainable future

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Penetration of sustainability in installation

Q: In what share of your projects are you dealing with sustainability topics?



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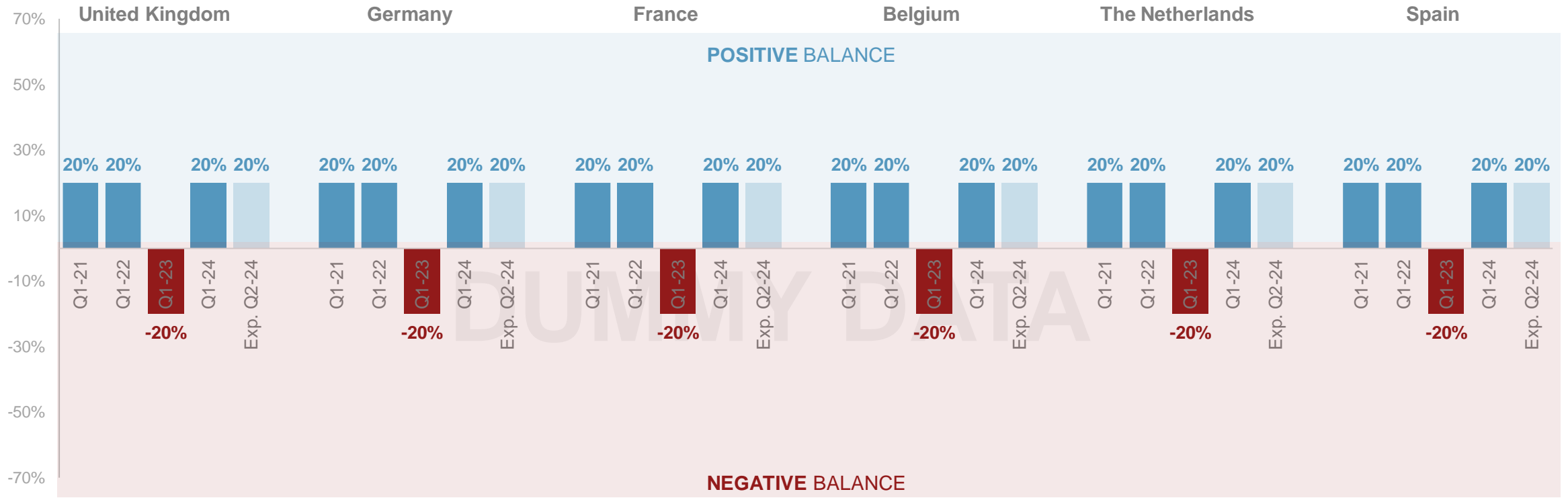


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Turnover balance

Q: If you compare your turnover of Q1-24 to the same quarter last year, how did your turnover develop?

(% INCREASE minus % DECREASE)

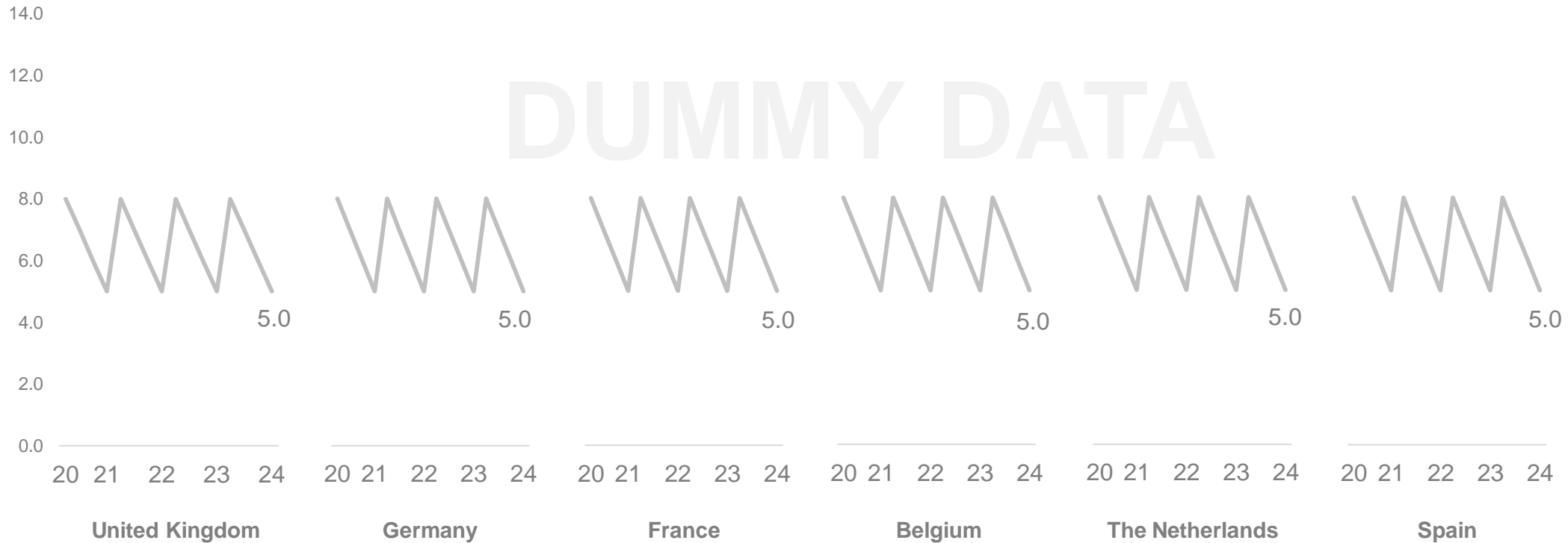


Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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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)

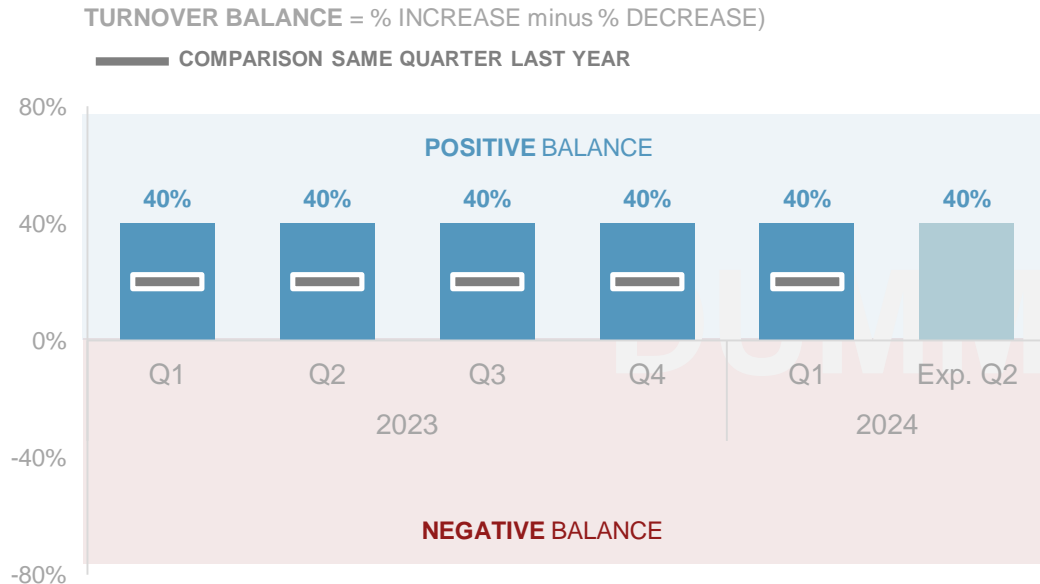


Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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Turnover balance

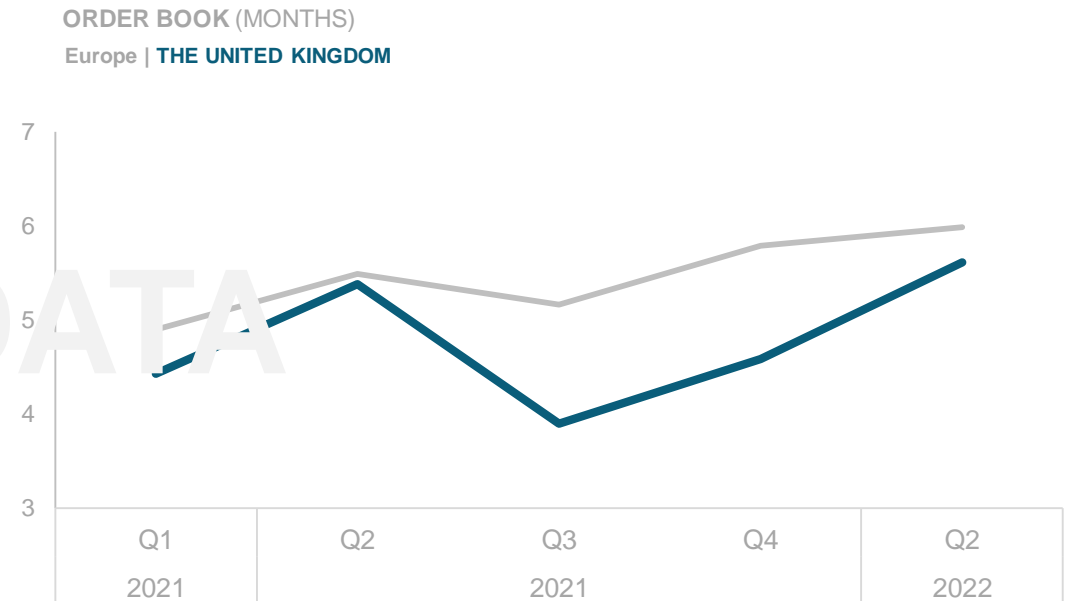
Q: If you compare your turnover of Q1-24 to the same quarter last year, how did your turnover develop? What are your expectations for the development in Q2-24?



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

Order book portfolio

Q: How big is your current order book portfolio?



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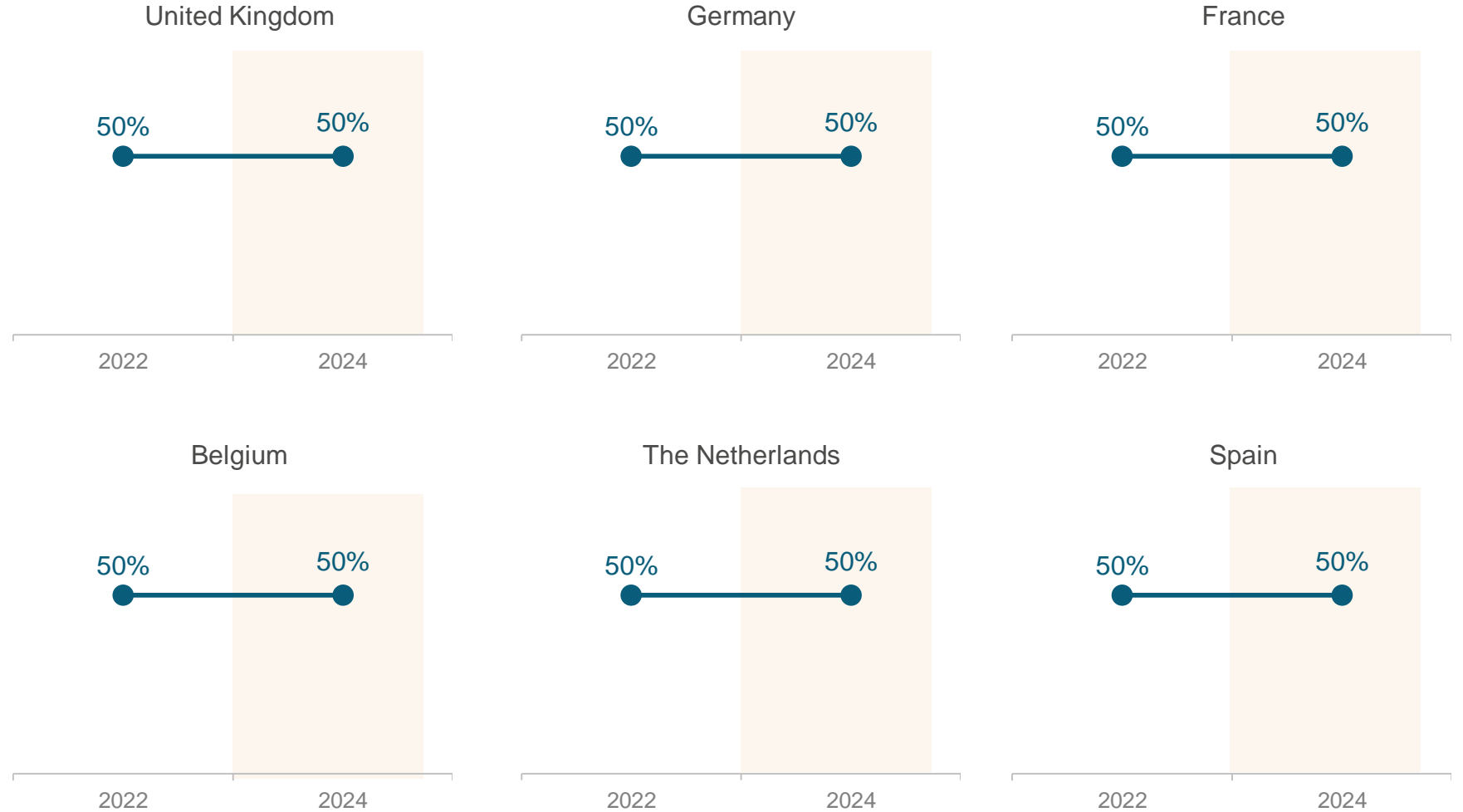
Spain

Appendix



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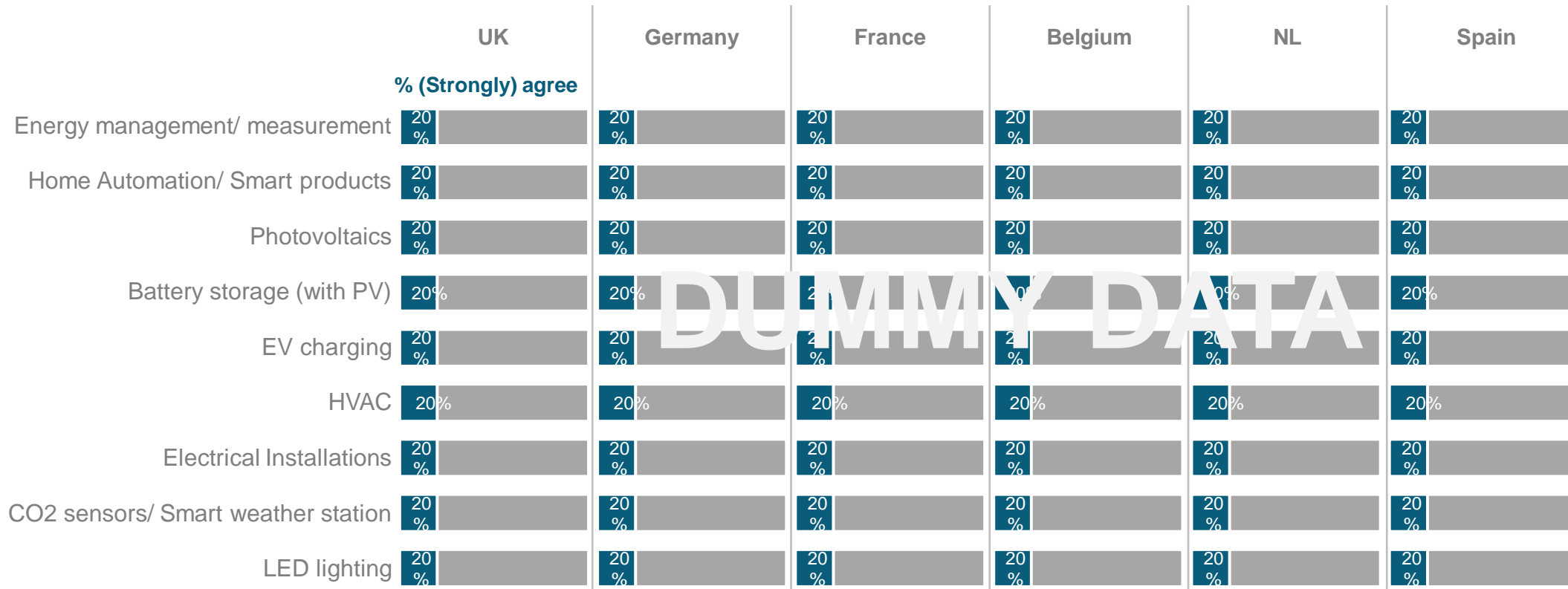
Average % of projects in which any kind of sustainability influence takes place
(like energy efficiency, carbon footprint, using recycled materials or general regulation)



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Most used installation products in sustainable solutions

Q: Which installation products are mainly being used/chosen in your projects when sustainable solutions are requested?



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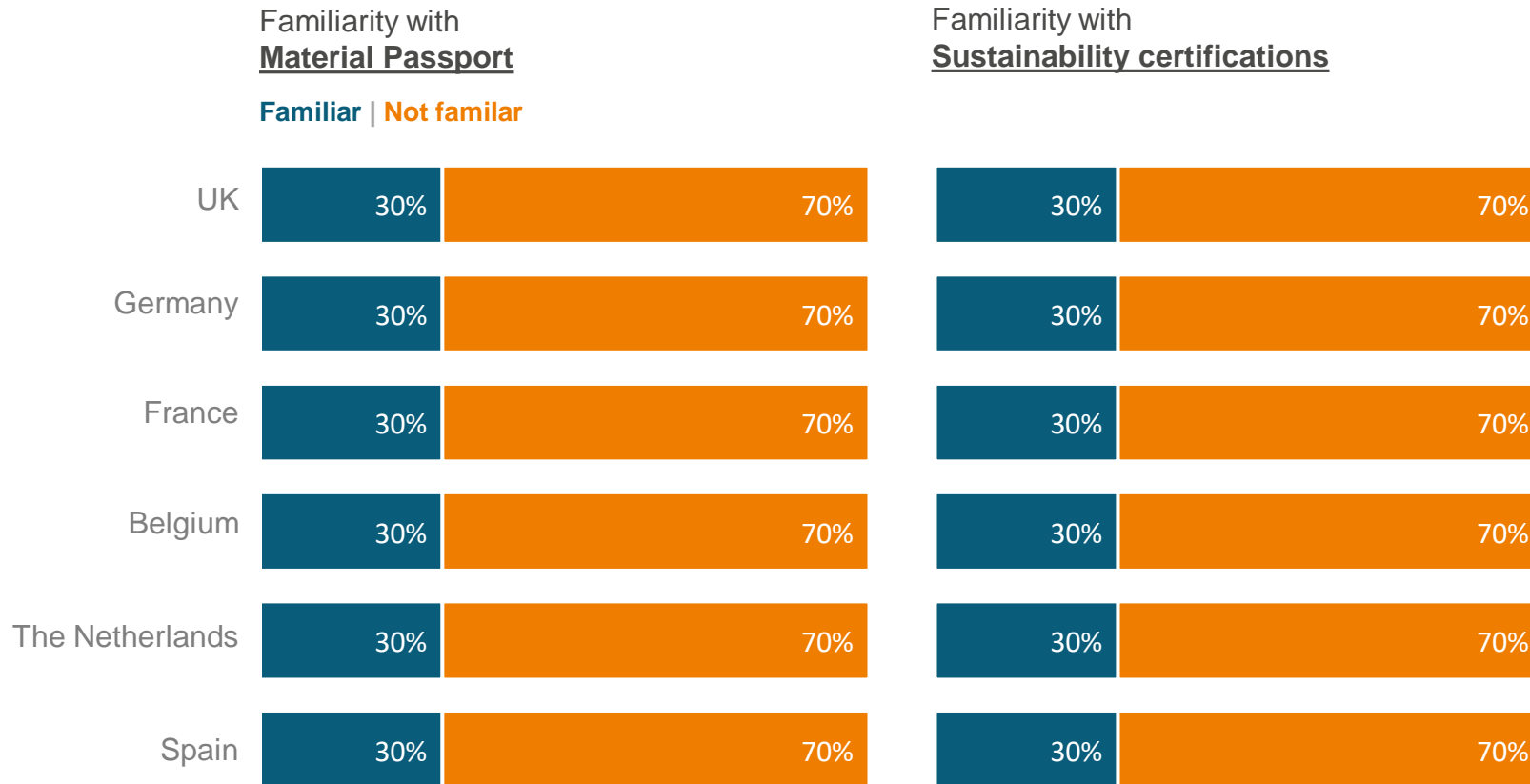
Leaders in sustainable solutions

Q: When thinking about advanced sustainable solutions, which manufacturers of electrical installation products come first to your mind? [Top-1]



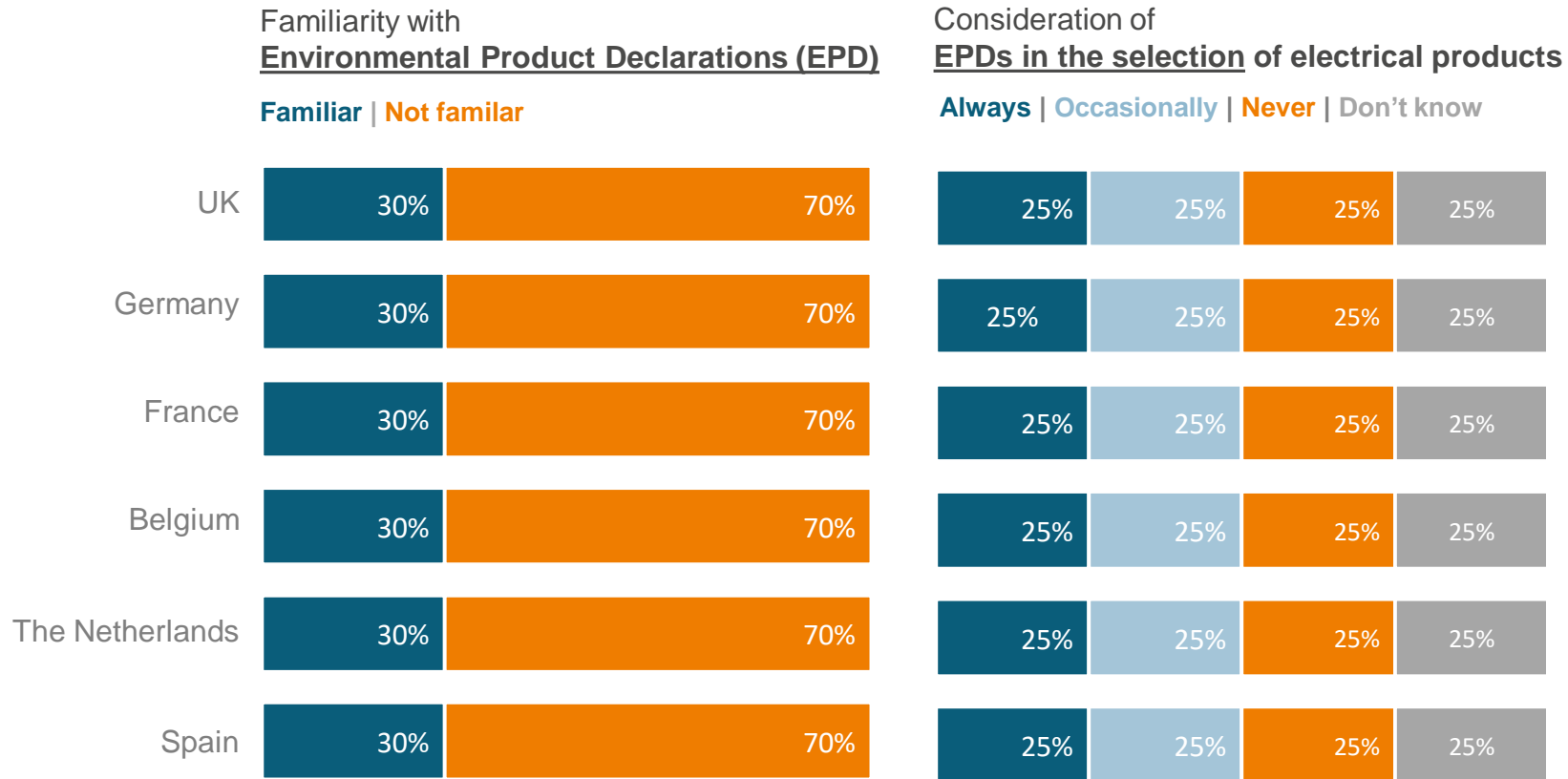
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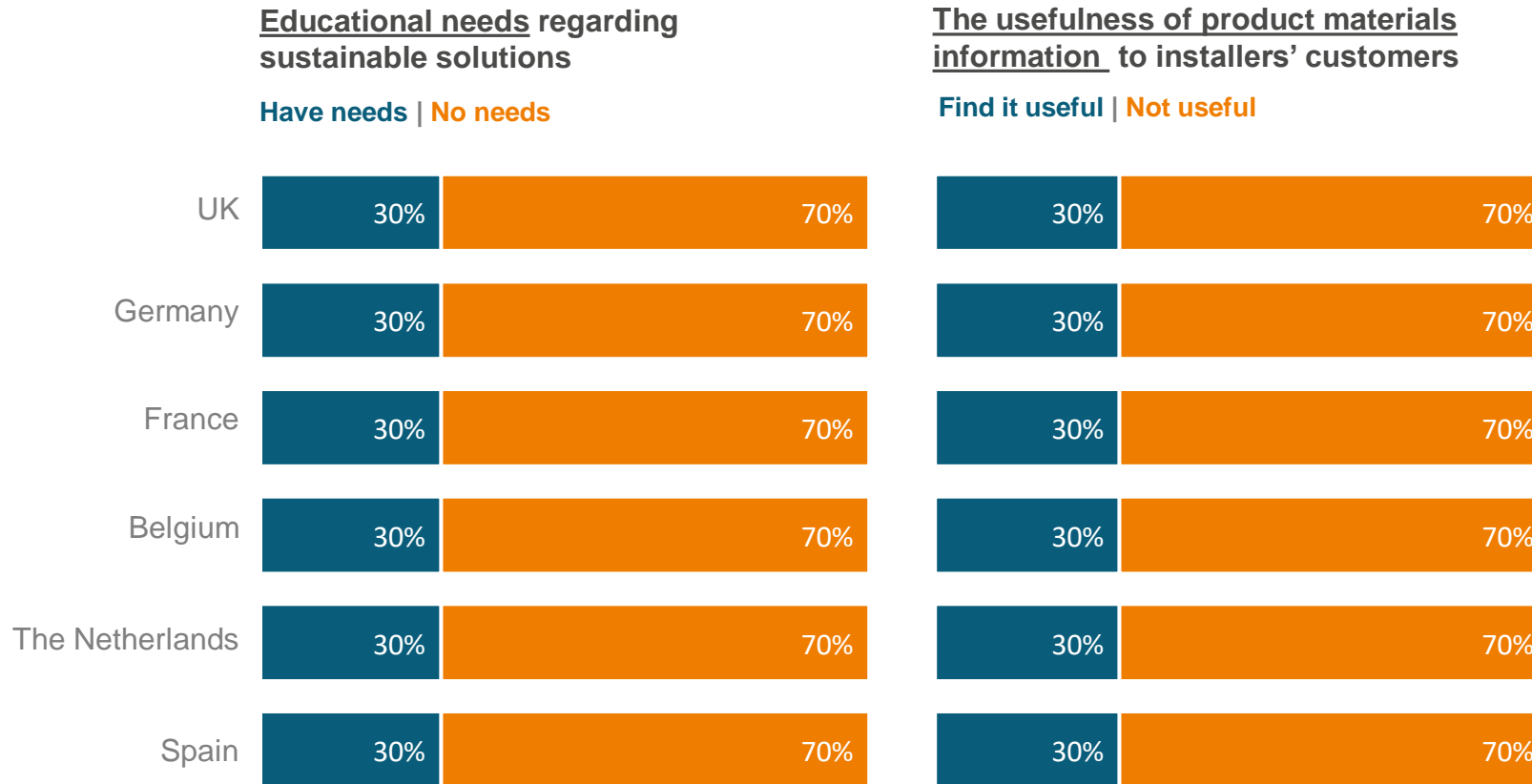


[only respondents familiar with EDP]

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Installers' sentiment

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

'We actively promote sustainable solutions'

(Strongly) agree | Neutral | Disagree (strongly)

	(Strongly) agree	Neutral	Disagree (strongly)
UK	20%	20%	20%
Germany	20%	20%	20%
France	20%	20%	20%
Belgium	20%	20%	20%
The Netherlands	20%	20%	20%
Spain	20%	20%	20%

'We integrate sustainability calculations in our proposals'

UK	20%	20%	20%
Germany	20%	20%	20%
France	20%	20%	20%
Belgium	20%	20%	20%
The Netherlands	20%	20%	20%
Spain	20%	20%	20%

'We are implementing strategies to minimize packaging waste'

UK	20%	20%	20%
Germany	20%	20%	20%
France	20%	20%	20%
Belgium	20%	20%	20%
The Netherlands	20%	20%	20%
Spain	20%	20%	20%

'We are confident in our knowledge of the latest legislation about environmental requirements'

UK	20%	20%	20%
Germany	20%	20%	20%
France	20%	20%	20%
Belgium	20%	20%	20%
The Netherlands	20%	20%	20%
Spain	20%	20%	20%

'Staying informed about the latest sustainability legislation is crucial for my role as an electrical installer'

UK	20%	20%	20%
Germany	20%	20%	20%
France	20%	20%	20%
Belgium	20%	20%	20%
The Netherlands	20%	20%	20%
Spain	20%	20%	20%

'It is important to have manufacturers' take-back programs for old/ replaced products'

UK	20%	20%	20%
Germany	20%	20%	20%
France	20%	20%	20%
Belgium	20%	20%	20%
The Netherlands	20%	20%	20%
Spain	20%	20%	20%

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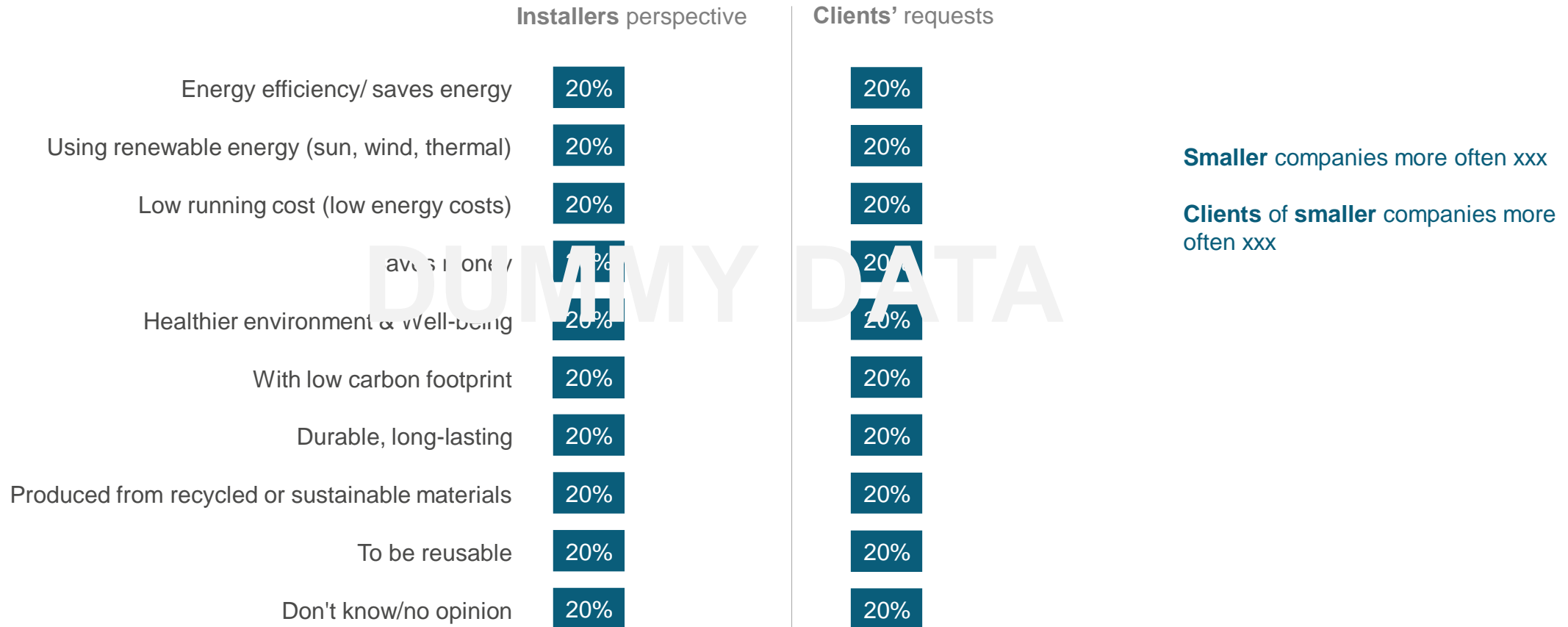


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Perception of sustainability

Q: In the electrical industry the manufacturers often talk about sustainable solutions. What are, according to you, the main characteristics of a sustainable solution? [Top-10]

Q: When your clients ask for sustainable solutions, what do they most often search for? [Top-10]



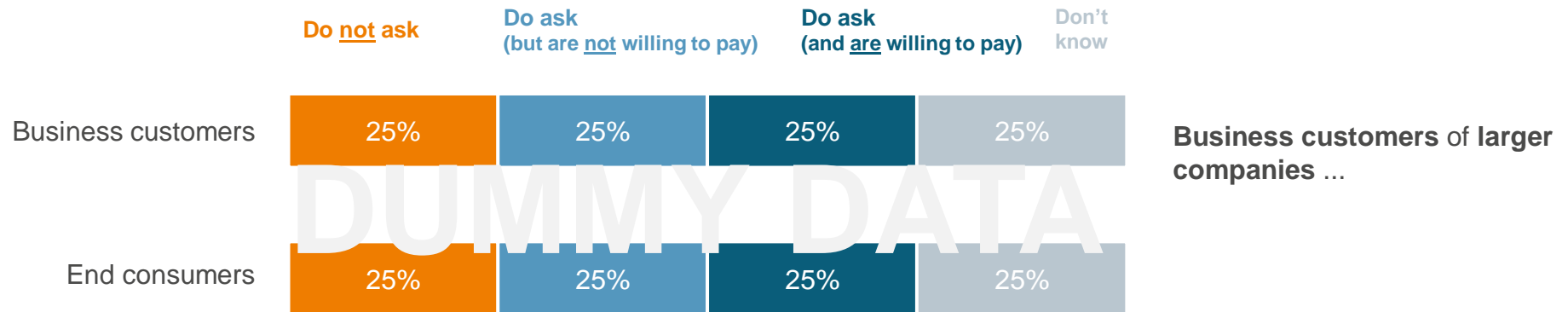
Base: n= 125, all installers

Base: n= XX, if client asks for sustainable solutions

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Willingness to invest in sustainability

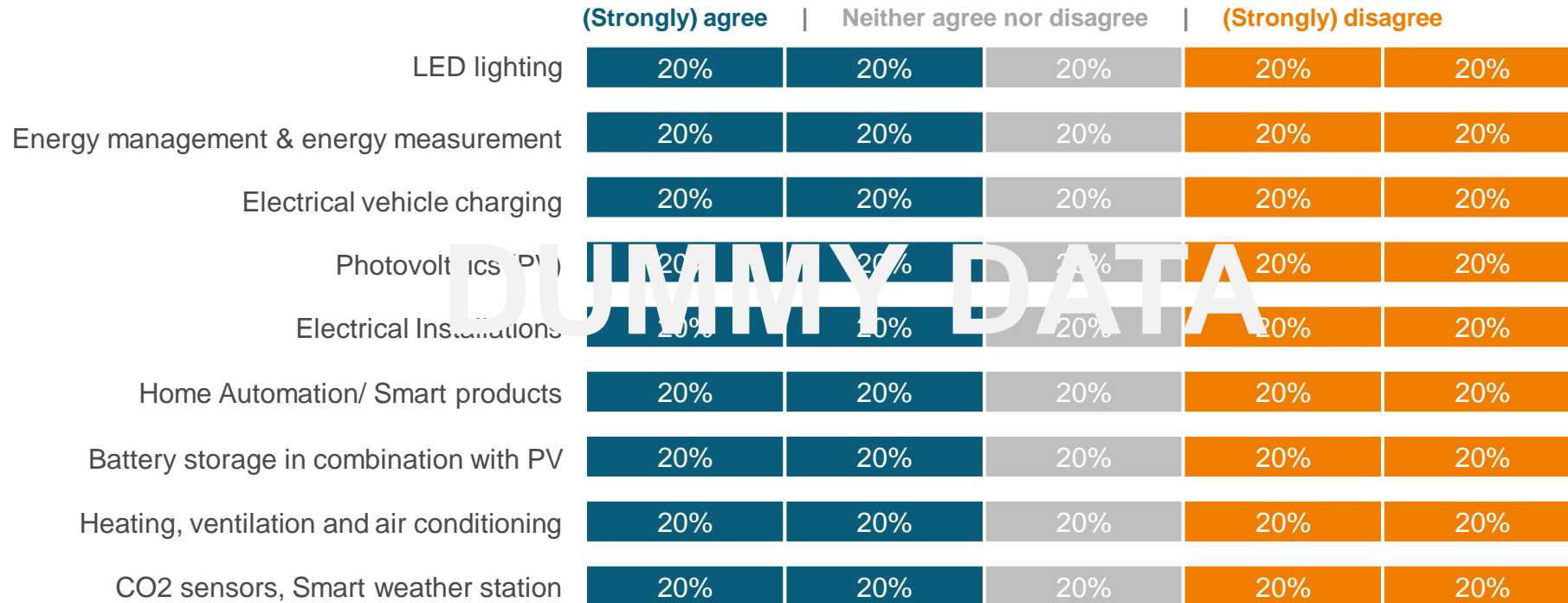
Q: If we divide your clients in two main types: business clients (contractors, architects, building owners etc) and end consumers, to what extent do those two types of customers ask for sustainable installation solutions?



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Installation products/ solutions

Q: To what extent do you agree that the following products/ solutions can be used for creating sustainable buildings?

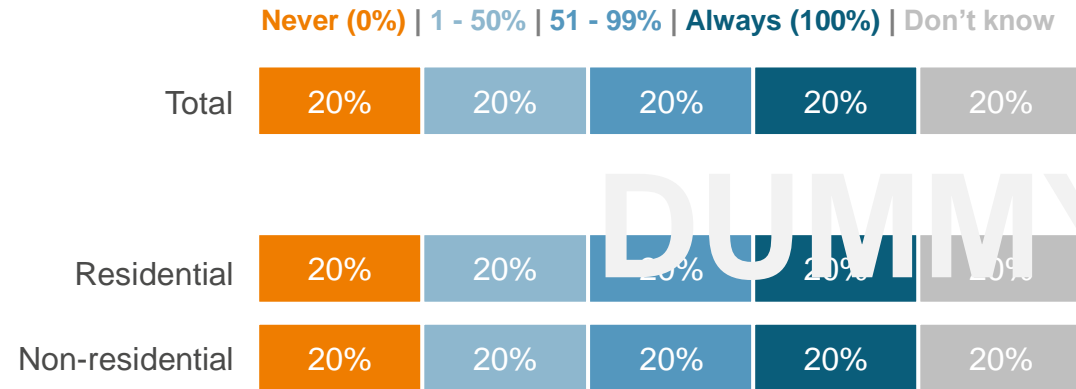


Base: n= 125, all installers

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Penetration of sustainability in installation

Q: In what share of your projects are you dealing with sustainability topics like energy efficiency, carbon footprint, using recycled materials, and compliance of the products with sustainability regulations?

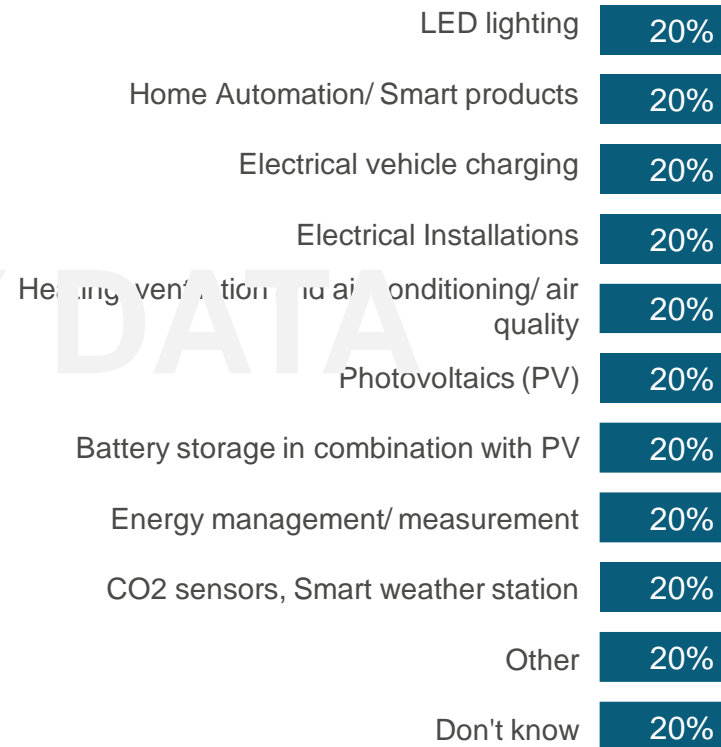


xx% believes that the demand for sustainable products will **increase in the coming 2 years**

Base: n= 125, all installers

Most used installation products in sustainable solution

Q: Which installation products are mainly being used/chosen in your projects when sustainable solutions are requested?

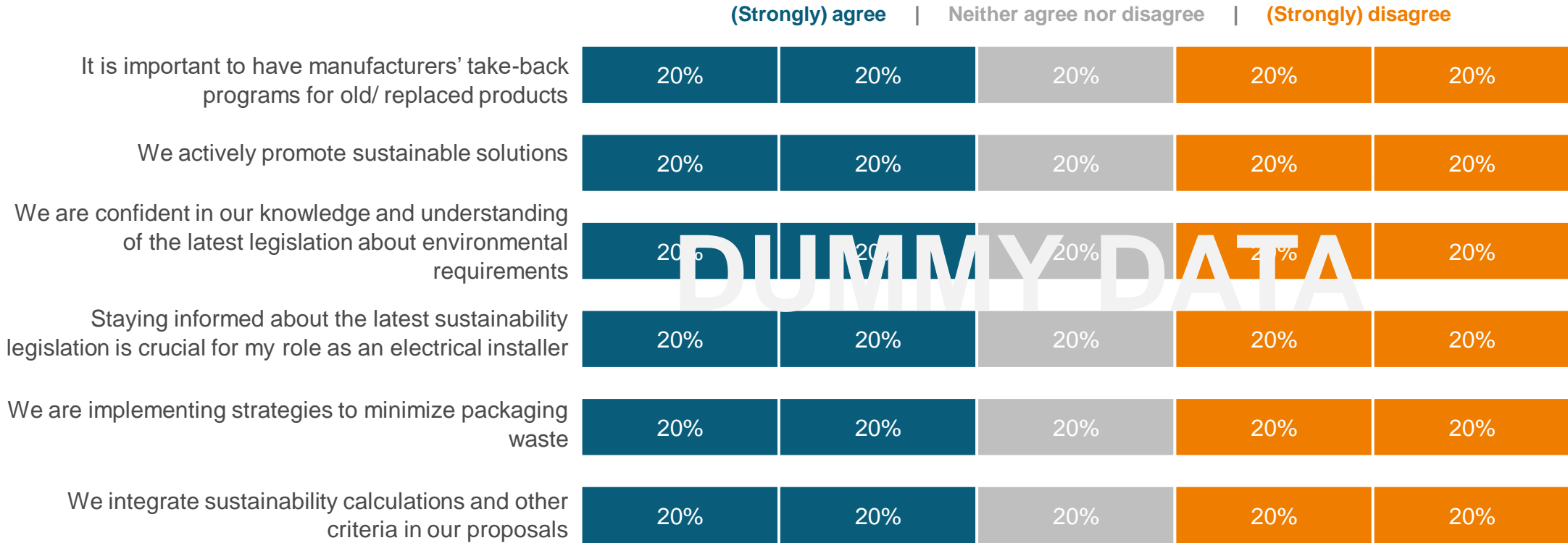


Base: n= XX, if involved in sustainability projects

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Installation products/ solutions

Q: To what extent do you agree that the following products/ solutions can be used for creating sustainable buildings?

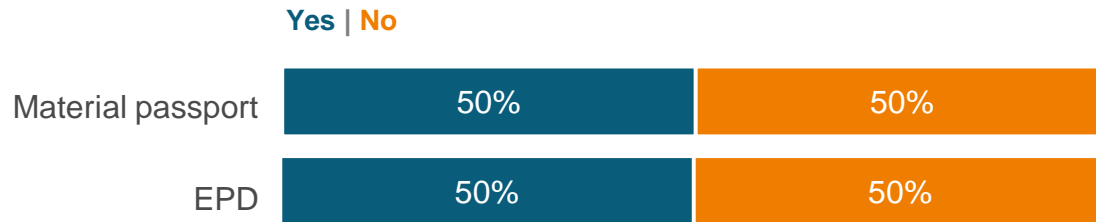


DUMMY DATA

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Familiarity with Material Passport and EPD (Environmental Product Declarations)

Q: Are you familiar with the terms ...?



Base: n= 125, all installers

Familiarity with sustainability certifications

Q: What sustainability certifications are you familiar with?

Familiar with sustainable certifications | Not familiar with any sustainable certification



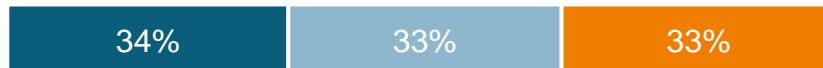
Top 3 familiar certifications:

1. XX
2. XY
3. XZ

Consideration of EPDs in the selection of electrical products

Q: How often do you consider Environmental Product Declarations (EPDs) when selecting electrical products for installation projects?

Always | Occasionally | Never



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Base: n= XX, if familiar with EPDs

DUMMY DATA

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Needs regarding sustainable solutions

Q: Do you have any needs for education, support, or advice regarding sustainable solutions?

Yes | No



Base: n= 125, all installers

The usefulness of product information materials

Q: Would providing product information materials about sustainability for your customers be helpful?

Yes | No



Base: n= 125, all installers

DUMMY DATA

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Leaders in sustainable solutions

Q: When thinking about sustainability/ advanced sustainable solutions, which manufacturers of electrical installation products (e.g. energy management, home automation) come first to your mind?



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Respondents' background characteristics

Job title of the interviewed respondents and the company size

Q: What is your position within the company?

Q: Yourself included, how many fulltime employees does your company have in total, in all branches?

	UK	Germany	France	Belgium	Netherlands	Spain
Owner / director / manager	50%	50%	50%	50%	50%	50%
Project manager	0%	0%	0%	0%	0%	0%
Engineer / designer	0%	0%	0%	0%	0%	0%
Installer	0%	0%	0%	0%	0%	0%
Calculator / work planner	0%	0%	0%	0%	0%	0%
Purchaser	0%	0%	0%	0%	0%	0%
1 - 4 FTE	0%	0%	0%	0%	50%	0%
5 - 14 FTE	0%	0%	0%	0%	50%	0%
15+ FTE	0%	0%	0%	0%	0%	0%

Q1 2024 data, unweighted

About USP

USP Marketing Consultancy



Head office



Subsidiaries



Rotterdam



Düsseldorf Zagreb



Market specialist

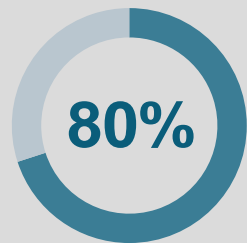
installation, construction, home improvement and real estate

Dedicated and multi-client research

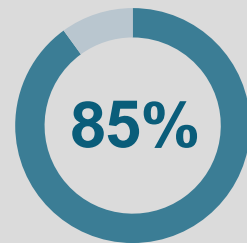
Active in the market for 30 years

250+ dedicated market research projects annually

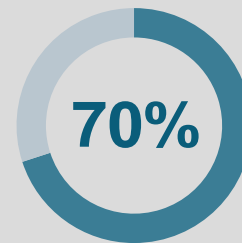
Revenue distribution



turnover coming from **international projects**



turnover coming from **dedicated market research**, 15% from multi client



turnover coming from **B2B**, 30% B2C

Research in **31** countries in 2021



43 focus groups



1,778 in-depth interviews



63,758 B2B CATI interviews



54,850 B2C online interviews



What we do

Examples



Segmentation



**Customer
journey**



Branding



**Concept/
product
research**



**Customer
satisfaction**



Trends



**Distribution
research**



**Market
exploration**



Pricing









**Market
size**



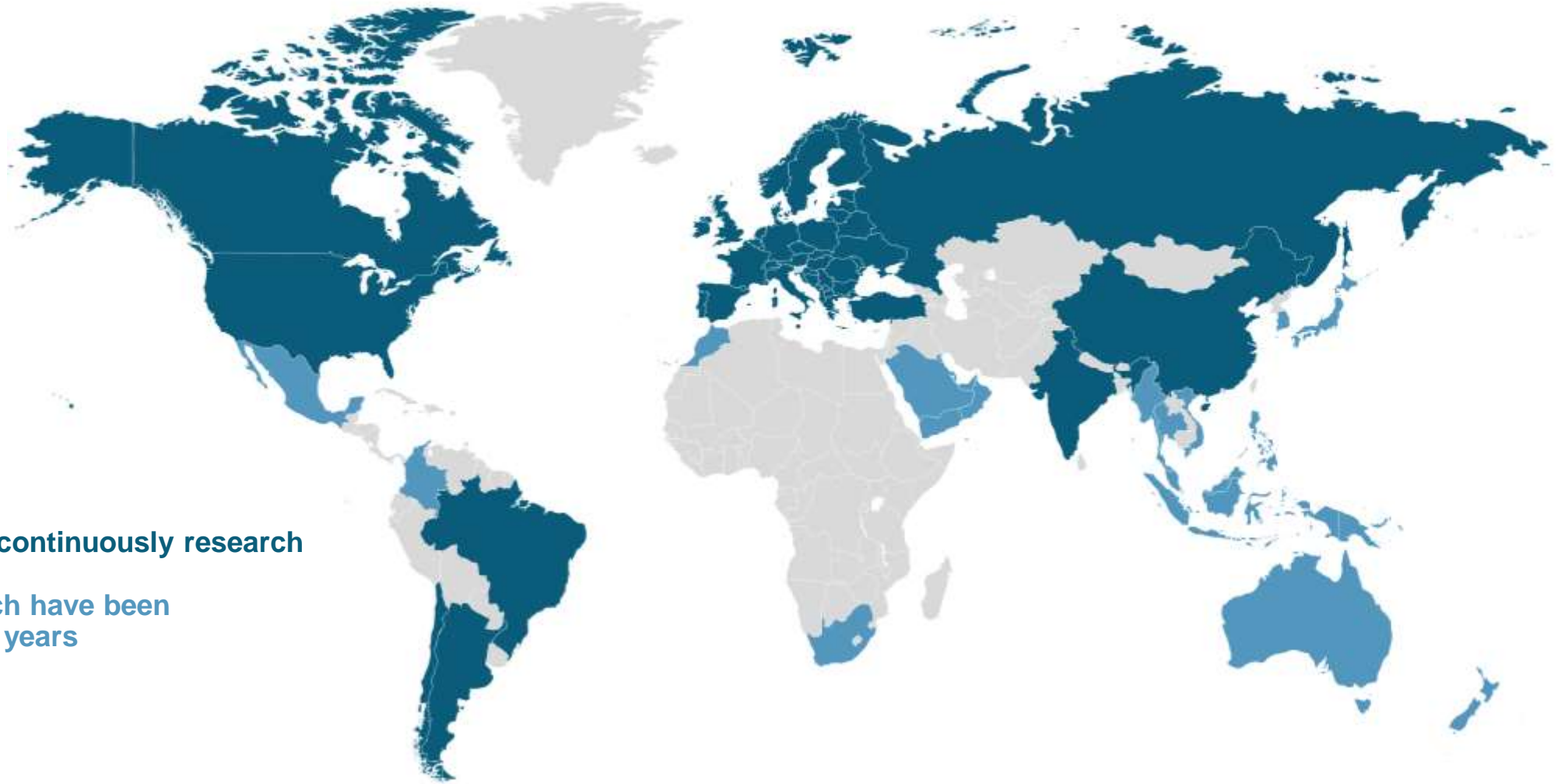
Dedicated market research

- Tailor made
- Driven by your information needs
- Advice & consultancy based on facts and over 25 years of experience in the industry
- Worldwide coverage
- B2B, B2C, qualitative and quantitative research or a combination of both
- Within our market specialism, all types of researches can be conducted
- Targeting the right audience, with the right questions at the right time.

Our multi-client research monitors

	European Architectural Barometer	European Contractor Monitor	European Mechanical Installation Monitor	European Electrical Installation Monitor	European Painter Insight Monitor	European Home Improvement Monitor
Target group	Architects	Building contractors	HVAC installers	Electrical installers	Professional painters	Consumers
Methodology						
Annual sample size	3,400 interviews	2,050 interviews	2,600 interviews	3,000 interviews	2,300 interviews	26,400 interviews
Country scope	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden • Austria
Way of reporting	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly
2022 Theme topics	<ul style="list-style-type: none"> • Q1: Sustainability • Q2: Trends in material usage • Q3: Decision making • Q4: Brand health scan 	<ul style="list-style-type: none"> • H1: Prefabrication • H2: Digitalisation and BIM 	<ul style="list-style-type: none"> • Q1: Digitalisation and BIM • Q2: Prefabrication • Q3: Smart buildings and products • Q4: Media orientation 	<ul style="list-style-type: none"> • Q1: Sustainability • Q2: Smart buildings and products • Q3: Services in the installation market • Q4: Brand health scan 	<ul style="list-style-type: none"> • Trend tracking • Sustainability • Labour shortage • Online buying • Media orientation 	<ul style="list-style-type: none"> • Q1: Orientation; rise of digital natives • Q2: Purchase Channels; online leaders • Q3: Brand health check • Q4: DIY vs DIFM; outsourcing jobs

We are active globally



Countries which we continuously research

Other countries which have been researched in past 2 years

Principals of USP

Installation				DIY		Construction	
		GIRA				ASSA ABLOY	
							
			KALDEWEI				
							Interface
							
							
							

USP Marketing Consultancy

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