



European Electrical Installation Monitor Q3 2025

Theme topic: Purchase channels
October 2025

A product by **USP** Marketing Consultancy

Index

About European Electrical Installation Monitor
Key takeaways
Business development
Theme topic – Purchase channels
Cross country summary
United Kingdom
Germany
France
Poland
Belgium
The Netherlands
Spain
Denmark
Sweden
Appendix



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 nine 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 2025:

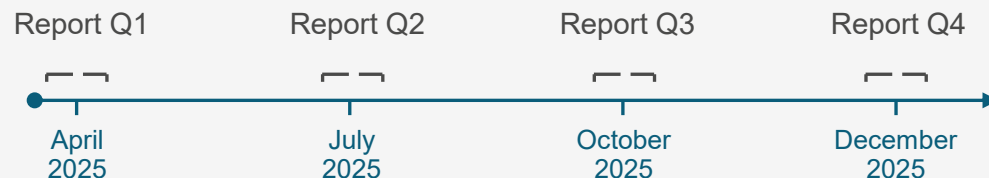
Q1: Training needs

Q2: Media orientation

Q3: Purchasing channels

Q4: BIM/New digital tools

THE TIMELINE

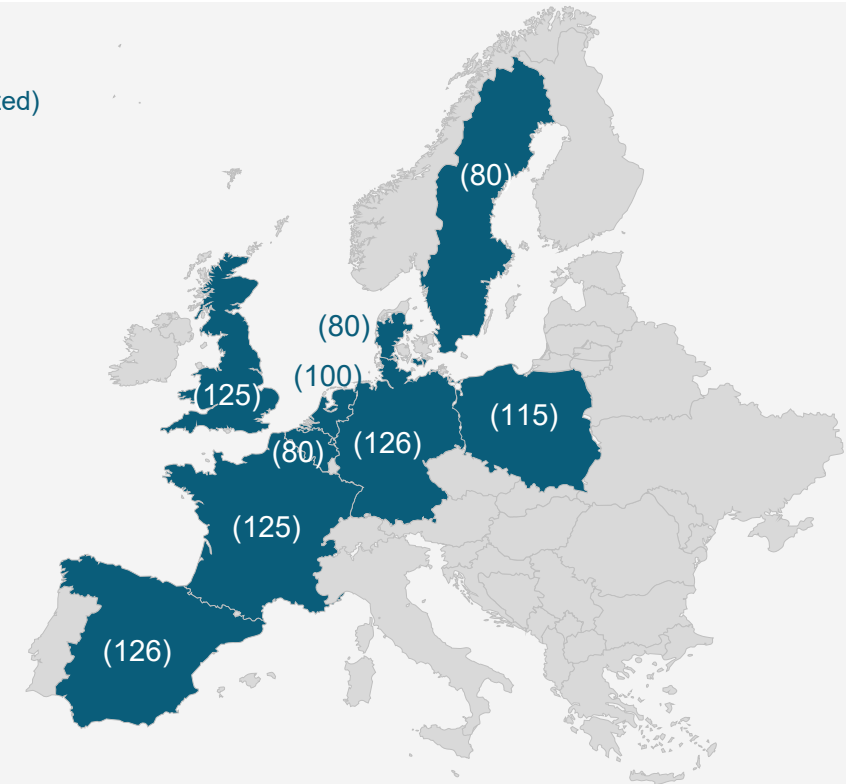


COUNTRY SCOPE

(number of interviews conducted)

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

The standard report includes 7 countries, with Denmark and Sweden available as optional additions - bringing the total to 9 countries



PROJECT TEAM



Maja Markovic

Team Leader/
Consultant

+31 682834333
m.markovic@usp-mc.nl



Valentino Vlahovic

Project Manager

-
vlahovic@usp-mc.nl



Dirk Hoogenboom

Research consultant

+31 652098924
hoogenboom@usp-mc.nl

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

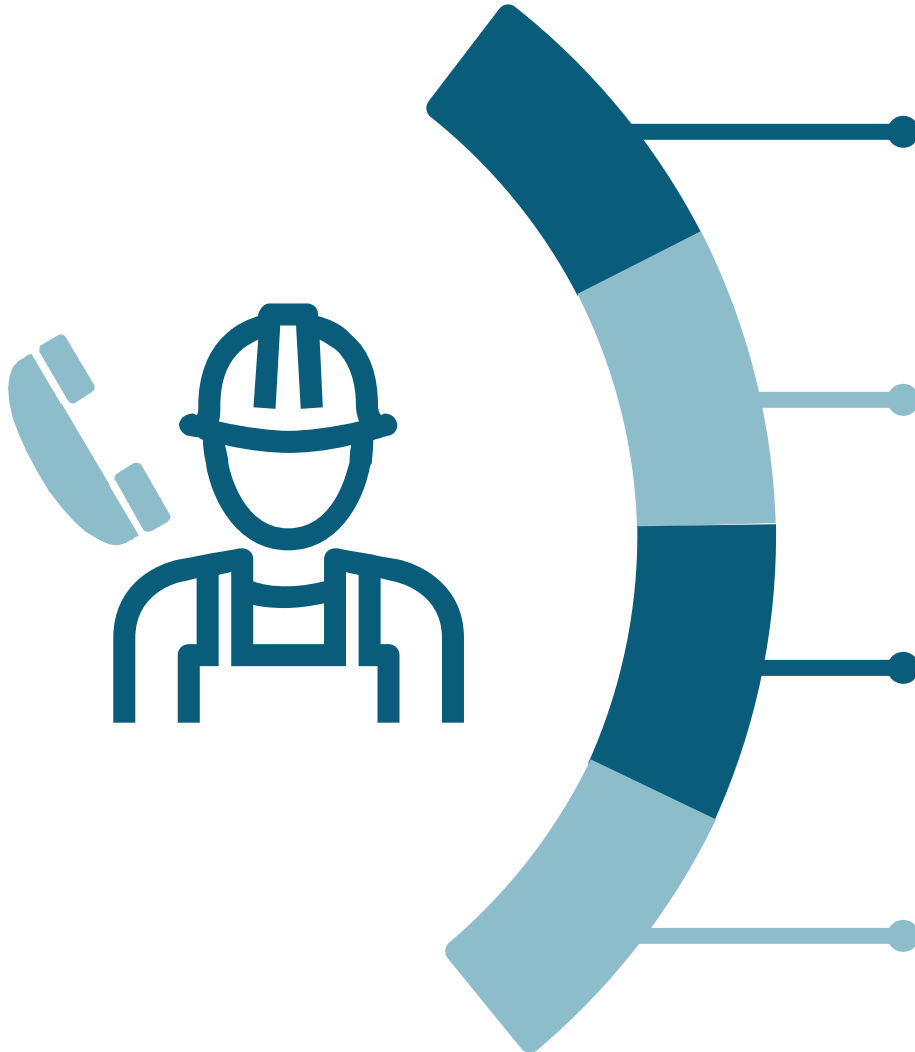
USP possesses an international database of electrical installation companies, which is constantly updated. Respondents are thus not part of a fixed panel; the sample varies from wave to wave.

... 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.



* Group 1: 1-4 FTE; Group 2: 5-14 FTE; Group 3: 15+ FTE

About the 2025 Q3 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 preferences

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.

About the Q3 2025 theme questions ^(1/2)

Respondents were asked the following questions about Purchasing Channels:

- Do you buy electrical installation products used in your daily job through the following channels?
- Approximately what share of your total spending on installation products is done through each of the following channels?
- Approximately what percentage of your orders are done in each of the following ways?
- Approximately what share of products you order at the traditional specialised installation wholesale do you...?
 - % Get delivered
 - % Pick up at the local wholesale branch
- When ordering installation products, what delivery time do you usually want or expect for most of your orders?
- 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...?
 - Buy similar products from another brand available at your wholesaler
 - Go to another wholesaler
 - Search for the product online
 - Search the product at a DIY store
- Would you consider buying second-hand or refurbished installation products from a trusted electrical wholesaler?
- For which types of electrical products would you consider second-hand or refurbished?
- In the next 2 to 3 years, what do you think will most change the way you buy installation products?
- Do sustainability labels or CO₂ information influence where you choose to buy installation products?

About the Q3 2025 theme questions (2/2)

Respondents were asked the following questions about Purchasing Channels:

- Now thinking about the electrical installation manufacturers you buy from directly... Approximately what percentage of your orders there is placed in each of the following ways?
 - % By telephone, e-mail, or via the sales reps
 - % Online via the manufacturer's website/ webshop
 - % Online via the manufacturer's mobile app
- From which pure online shops have you bought installation products most often?
- When buying installation products online, do you use any of the following features?
 - Reviews or product ratings
 - Tools to compare products (e.g., price, specs, brand)
 - Suggestions like "you may also need..."
 - Online chat or help assistant
- In cases where you buy at DIY stores rather than specialist installation wholesalers, what are your reasons for doing so?
- How would you divide your purchases on Power Tools / Electrical consumables / Lighting fixtures / Home automation systems installations / Electrical enclosures / Switches & socket outlets over the following channels?
 - Directly from the manufacturer
 - Specialized electrical installation wholesale
 - DIY stores
 - Pure online shops/ web shops

Index

About European Electrical Installation Monitor

Key takeaways

Business development

Theme topic – Purchase channels

Cross country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Spain

Denmark

Sweden

Appendix



Key takeaways

DUMMY DATA

1

Business Development

Q3-25 was positive for most markets, with only France and Poland showing a negative turnover balance. Expectations remain positive for Q4-25 across most markets, except in Poland.

- 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.

Turnover balance

Negative | Positive

Spain	Q3-25		20%
	Exp. Q4-25		20%
The Netherlands	Q3-25		20%
	Exp. Q4-25		20%
Belgium	Q3-25		20%
	Exp. Q4-25		20%
UK	Q3-25		20%
	Exp. Q4-25		20%
Denmark	Q3-25		20%
	Exp. Q4-25		20%
Sweden	Q3-25		20%
	Exp. Q4-25		20%
Germany	Q3-25		20%
	Exp. Q4-25		20%
France	Q3-25		20%
	Exp. Q4-25		20%
Poland	Q3-24		20%
	Exp. Q4-25		20%

Key takeaways (1/2)

2

Purchase channels

Wholesalers remain essential

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

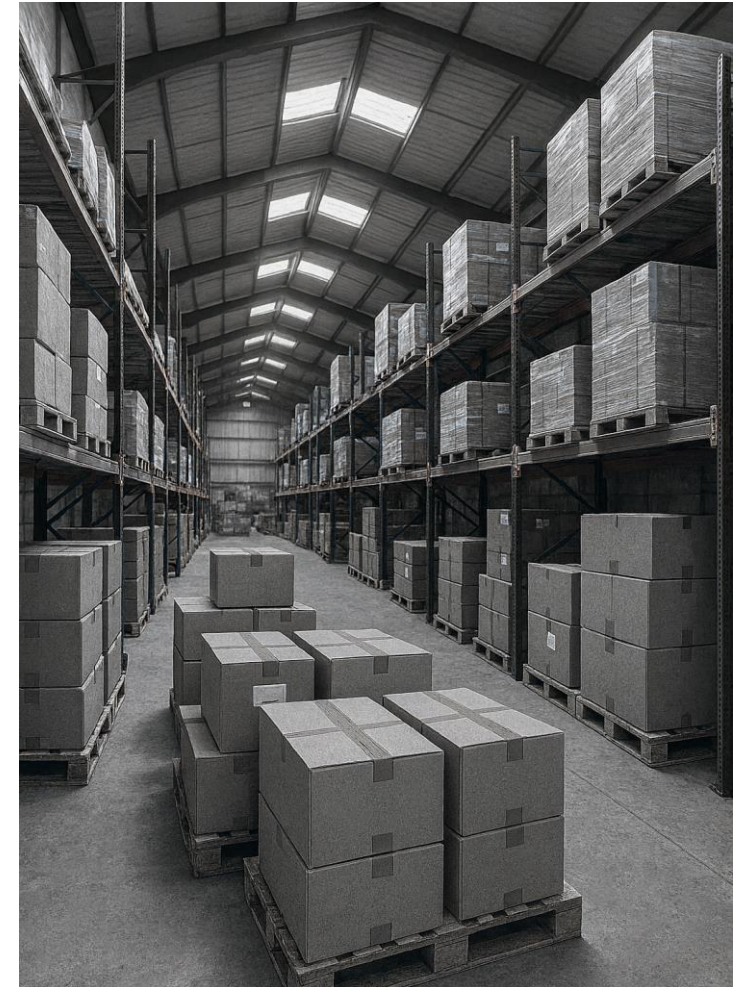
Pure online platforms play a complementary role

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

Fast and reliable delivery is a key installer expectation

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

DUMMY DATA



Key takeaways (2/2)

DUMMY DATA

2

Purchase channels

Counter orders decline while digital channels gain importance

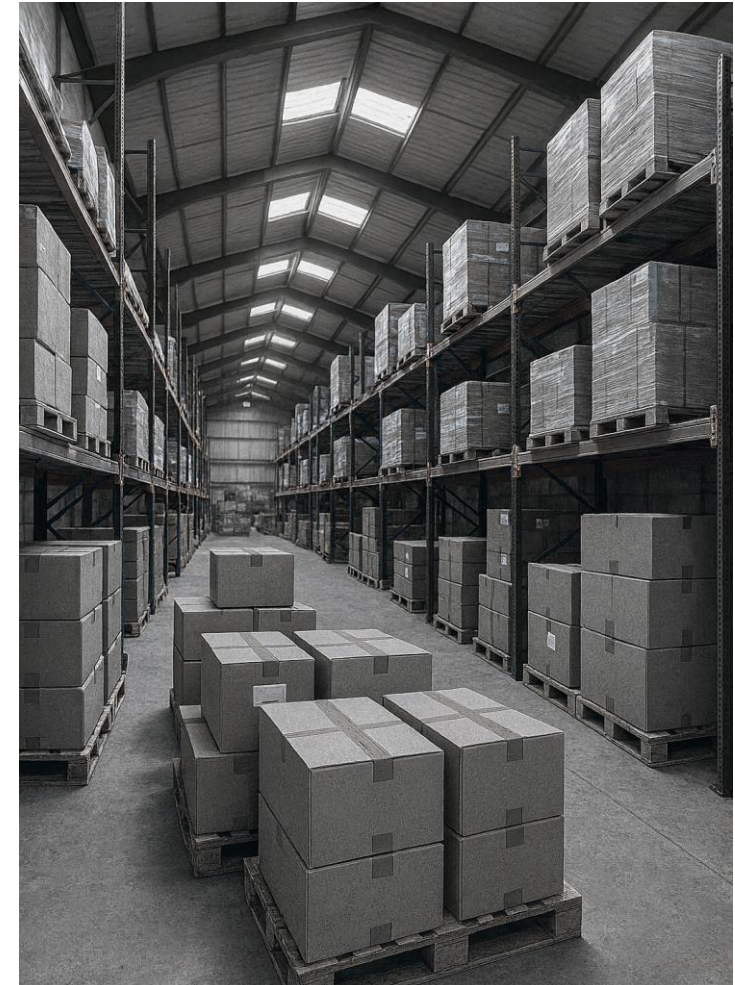
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

Direct manufacturer channels add strategic value

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

DIY channel usage varies by company size and age

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



Index

About European Electrical Installation Monitor

Key takeaways

Business development

Theme topic – Purchase channels

Cross country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Spain

Denmark

Sweden

Appendix



Research questions **Business development**

THE RESEARCH QUESTIONS

- *If you compare your turnover of Q3-25 to Q3-24, how did your turnover develop?*
- *What are your expectations for the development in Q-25?*
- *How big is your current order book portfolio? For how many months will you be able to keep your current staff working?*

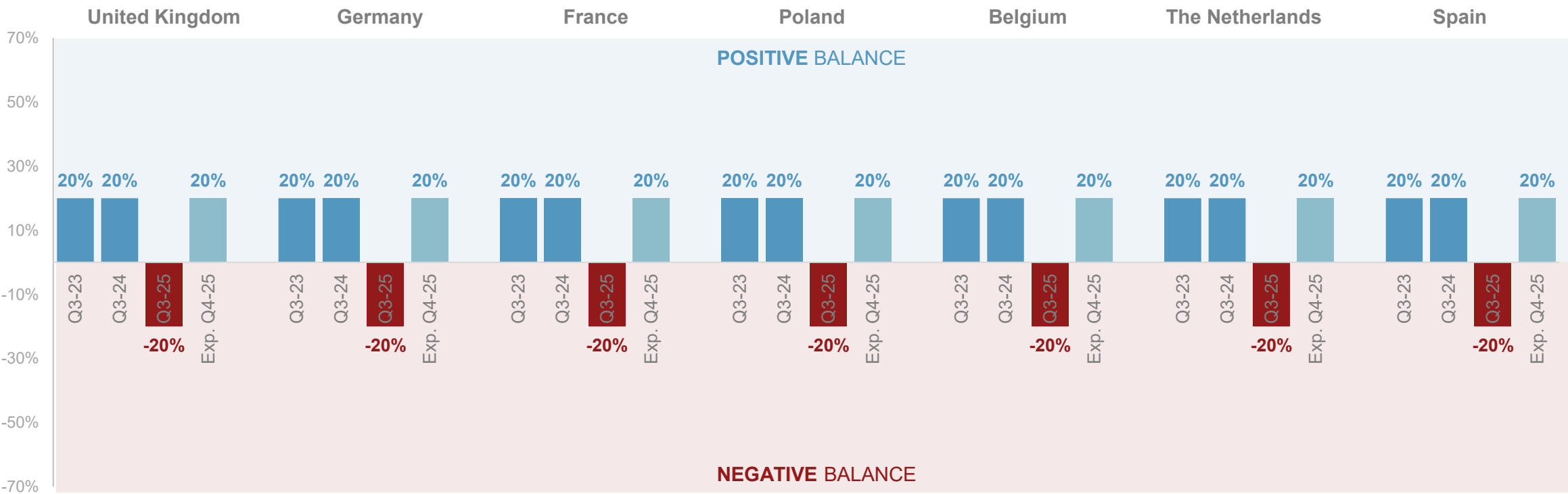
Lorem ipsum dolor sit amet, consectetur adipiscing elit.

DUMMY DATA

Turnover balance

Q: If you compare your turnover of Q3-25 to the same quarter last year, how did your turnover develop?

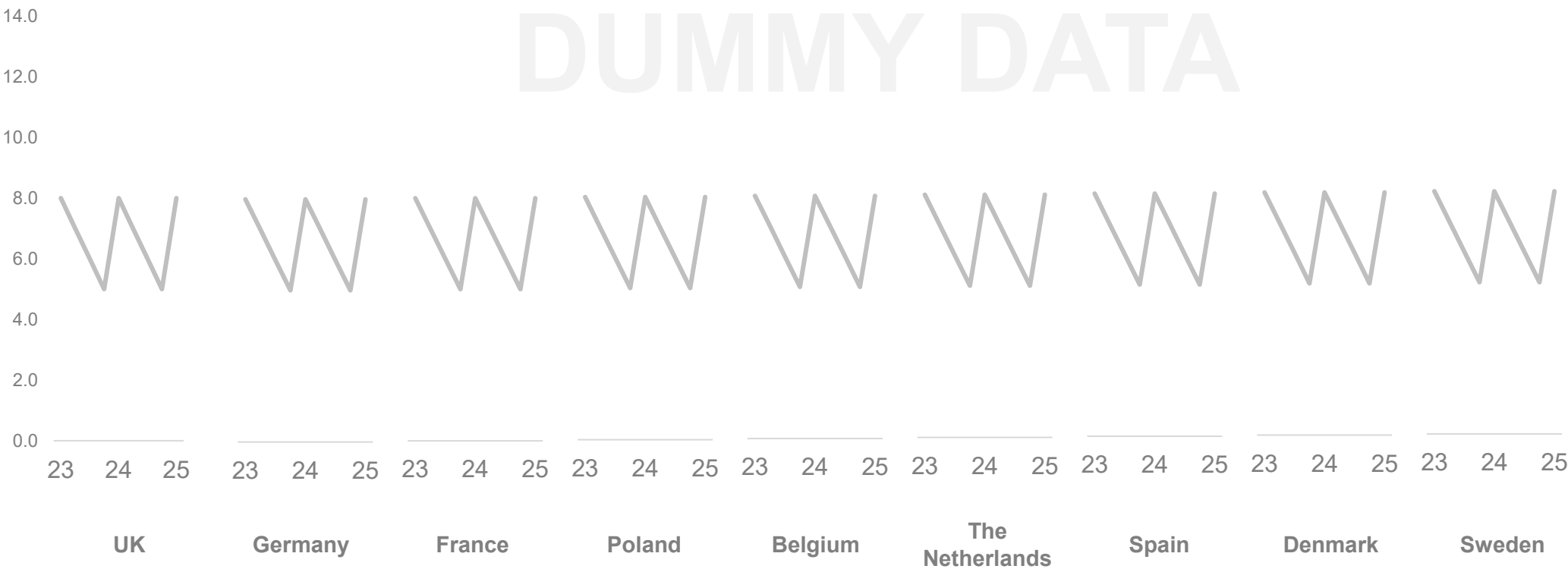
(% INCREASE minus % DECREASE)



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

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)



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

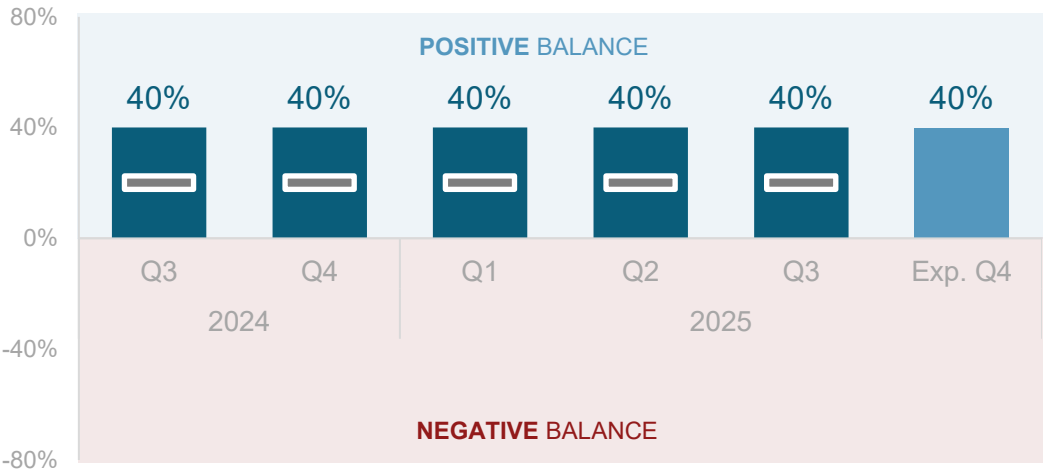
DUMMY DATA

Turnover balance

Q: If you compare your turnover of Q3-25 to the same quarter last year, how did your turnover develop? What are your expectations for the development in Q4-25?

TURNOVER BALANCE = % INCREASE minus % DECREASE)

COMPARISON SAME QUARTER LAST YEAR



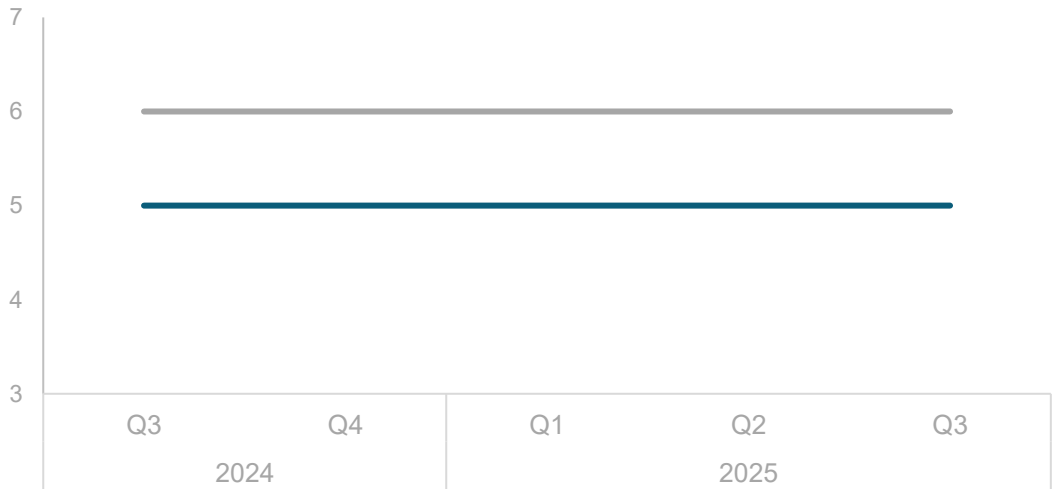
Detailed information regarding the turnover distribution can be found in the [appendix](#).

Order book portfolio

Q: How big is your current order book portfolio?

ORDER BOOK (MONTHS)

EU | THE UNITED KINGDOM



Index

About European Electrical Installation Monitor

Key takeaways

Business development

Theme topic – Purchase channels

Cross country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Spain

Denmark

Sweden

Appendix



Introduction | European overview

In the theme part of Q3 2025, special attention is paid to [Purchase channels](#).

In the past, manufacturers distributed their products exclusively through professional wholesalers - both general and specialized - who then supplied professionals. This was known as the traditional three-tier model.

Today, the purchasing landscape has evolved significantly. The decision-making process has become far more complex, shaped by a wide range of digital and offline options. The rise of e-commerce and direct supply models has blurred the lines between traditional channels. Manufacturers are no longer relying solely on wholesalers but increasingly sell directly to professionals. At the same time, DIY retailers are expanding their focus toward professional customers, while specialized and non-specialized online platforms continue to compete for market share traditionally held by wholesalers.

As a result, the market now operates within a **dynamic, multi-channel ecosystem**, where professionals choose between a growing number of suppliers based on convenience, availability, price, and service quality.

This chapter provides an overview of installers' purchasing behaviour and preferences. It explores:

- Distribution of total purchases across channels
- Methods of ordering and receiving products
- Average delivery times
- Reasons for choosing or preferring certain channels
- Expectations regarding future purchasing behaviour

The theme part begins with a European overview and cross-country comparison of key findings, followed by detailed results per country to highlight national differences and trends.

Lorem ipsum dolor sit amer, consectetur apidiscing elit.

DUMMY DATA

European level: Purchase channels used & distribution of total purchase among channels (share of wallet)

Do you buy electrical installation products used in your daily job through the following channels?
Approximately what share of your total spending on installation products is done through each of the following channels?

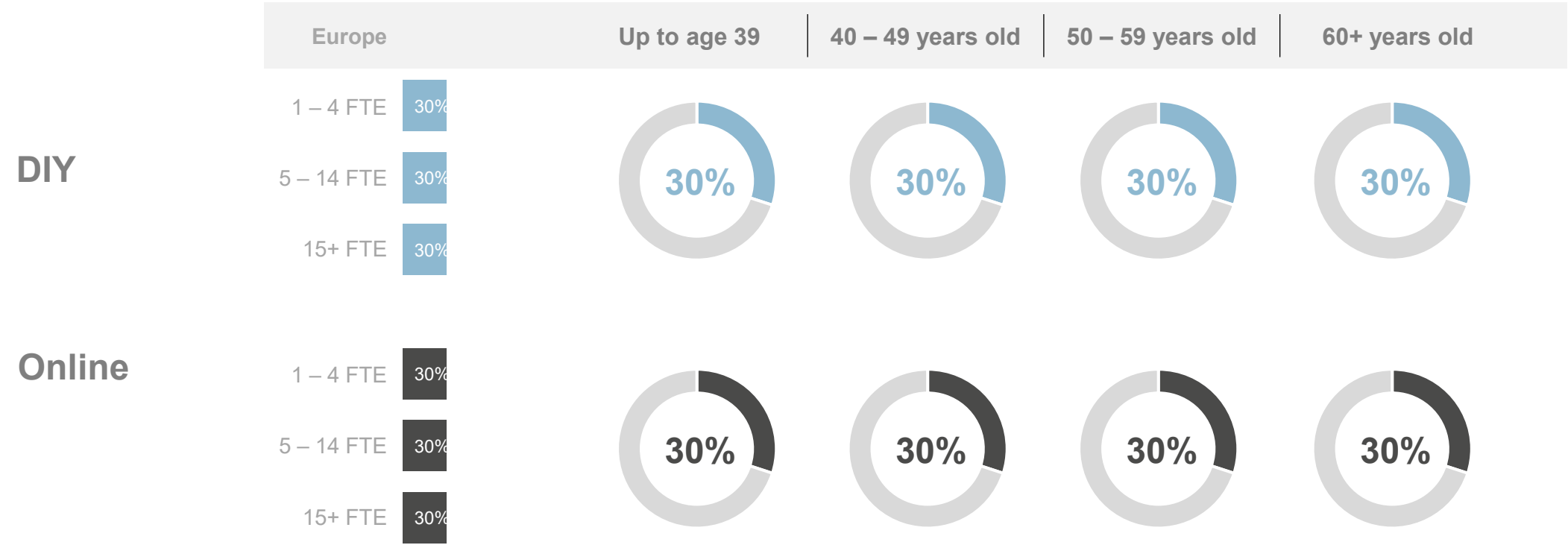
Manufacturer Wholesaler specialised DIY specialised & non-specialised Pure online specialised & non-specialised Other building materials wholesaler; hardware store			% of installers buying via...	Share of wallet (SOW)	Δ 2023	
Electrical installation wholesaler			30%	30%	+0%	Lorem ipsum dolor sit amer, consectetur apidiscing elit.
Traditional building material wholesaler			30%	30%	+0%	Lorem ipsum dolor sit amer, consectetur apidiscing elit.
Traditional hardware store			30%	30%	+0%	
DIY store			30%	30%	+0%	Lorem ipsum dolor sit amer, consectetur apidiscing elit.
Directly from the manufacturer			30%	30%	+0%	Lorem ipsum dolor sit amer, consectetur apidiscing elit.
Installation-specialised pure online shop			30%	30%	+0%	
Non-specialised pure online shops			30%	30%	+0%	Lorem ipsum dolor sit amer, consectetur apidiscing elit.

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

European level: DIY/ Online channel usage among different company sizes and ages

Do you buy electrical installation products used in your daily job through the following channels? (DIY)

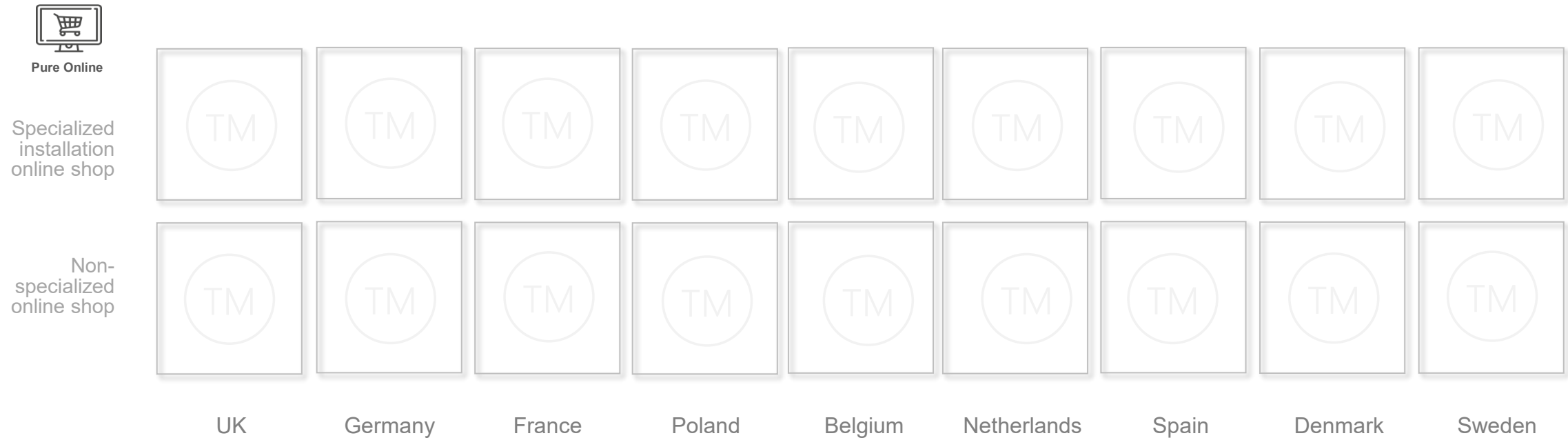


Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Top-1 online shop per country

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



Base: All

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

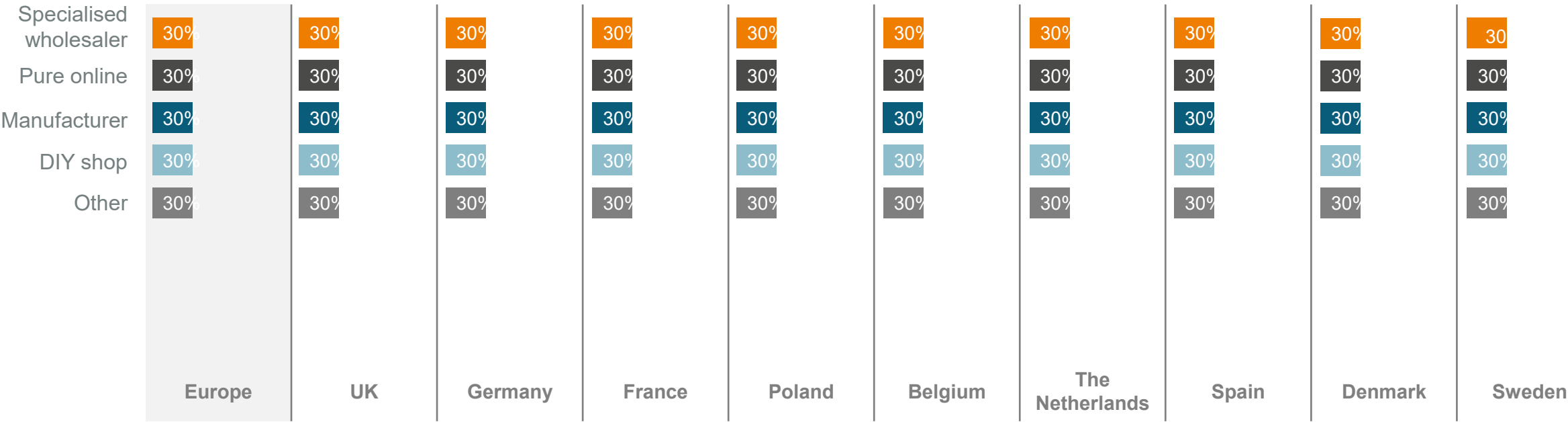
DUMMY DATA

Purchase channels

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: All

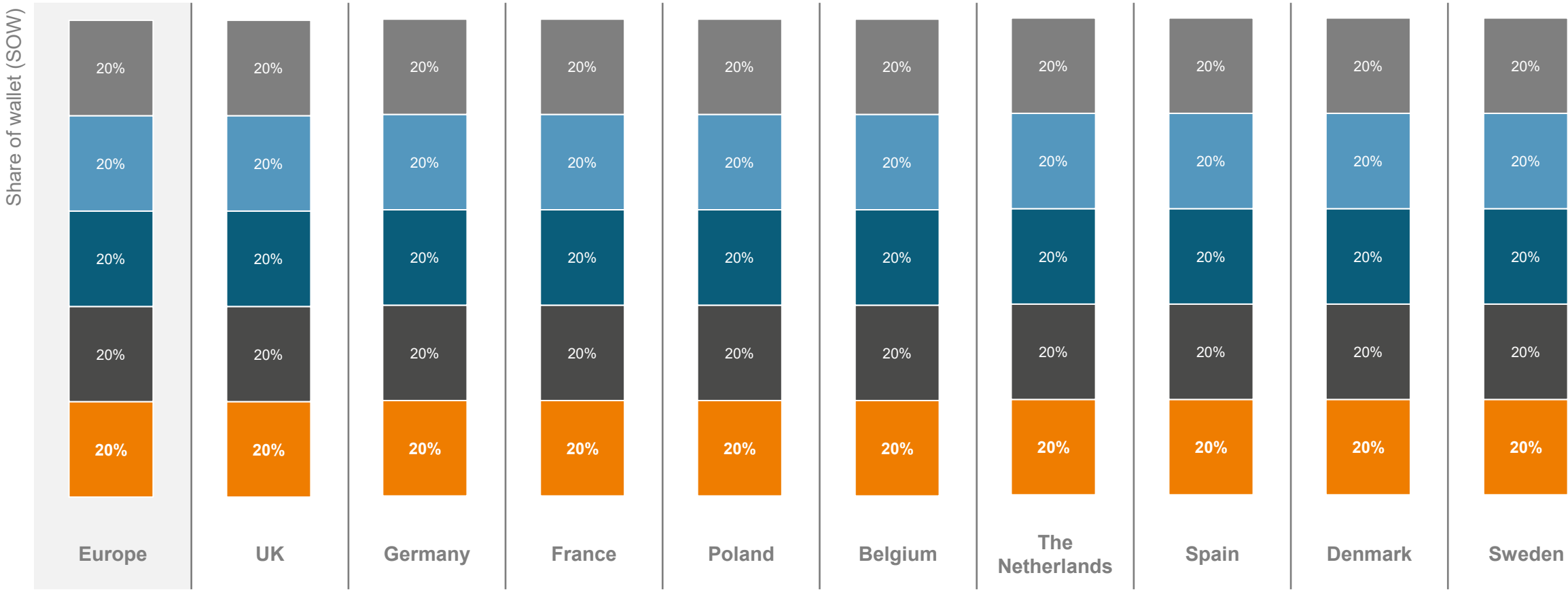
Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Distribution of total purchase among channels (share of wallet)

Approximately what share of your total spending on installation products is done through each of the following channels?

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

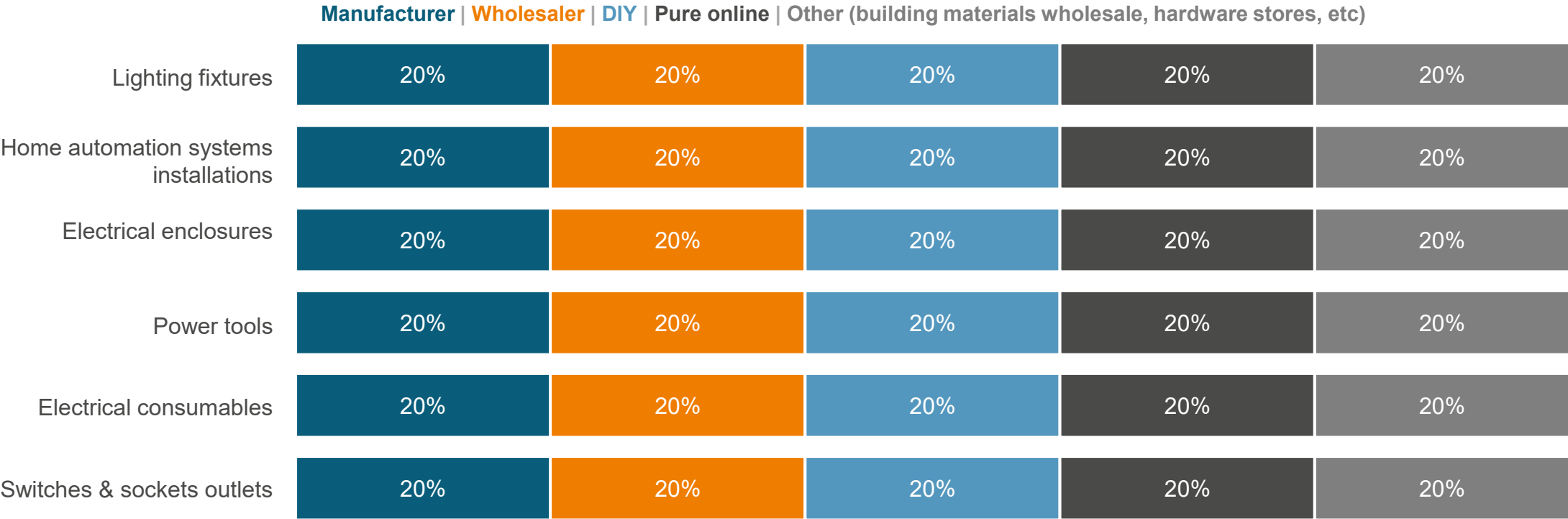


Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

European level: Distribution of various product group purchases across channels

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



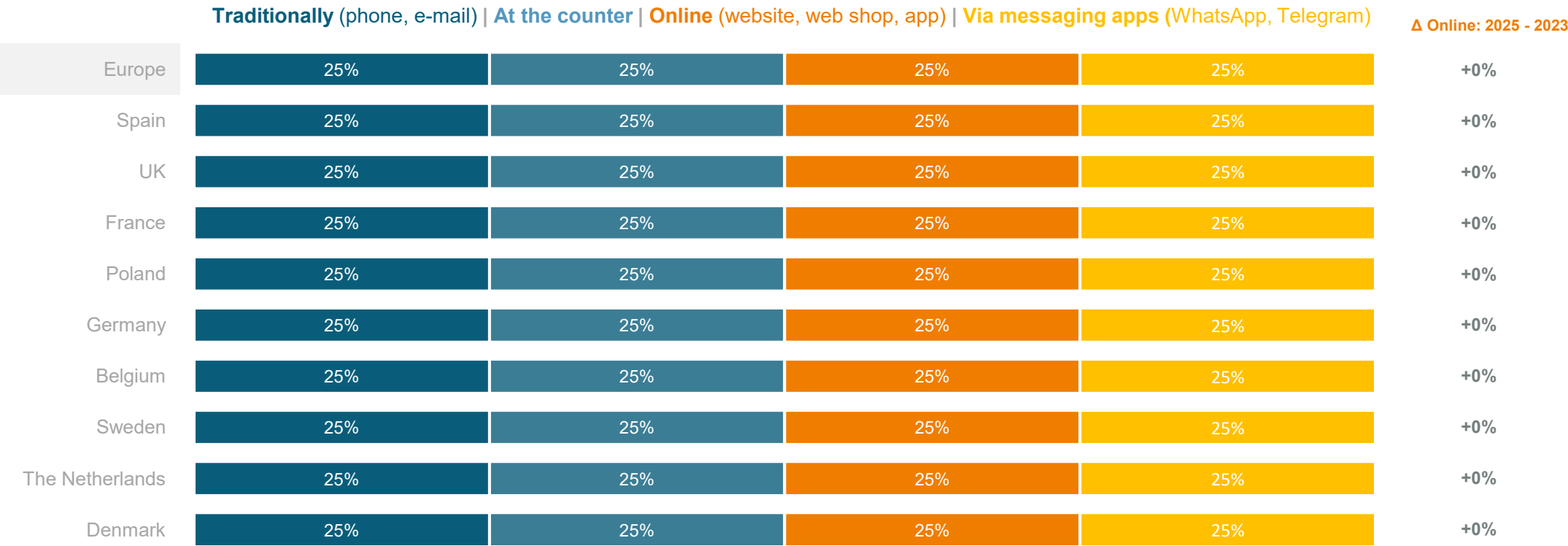
Base: All

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Way of ordering products from the electrical wholesalers

Approximately what percentage of your orders are done in each of the following ways?



Base: All

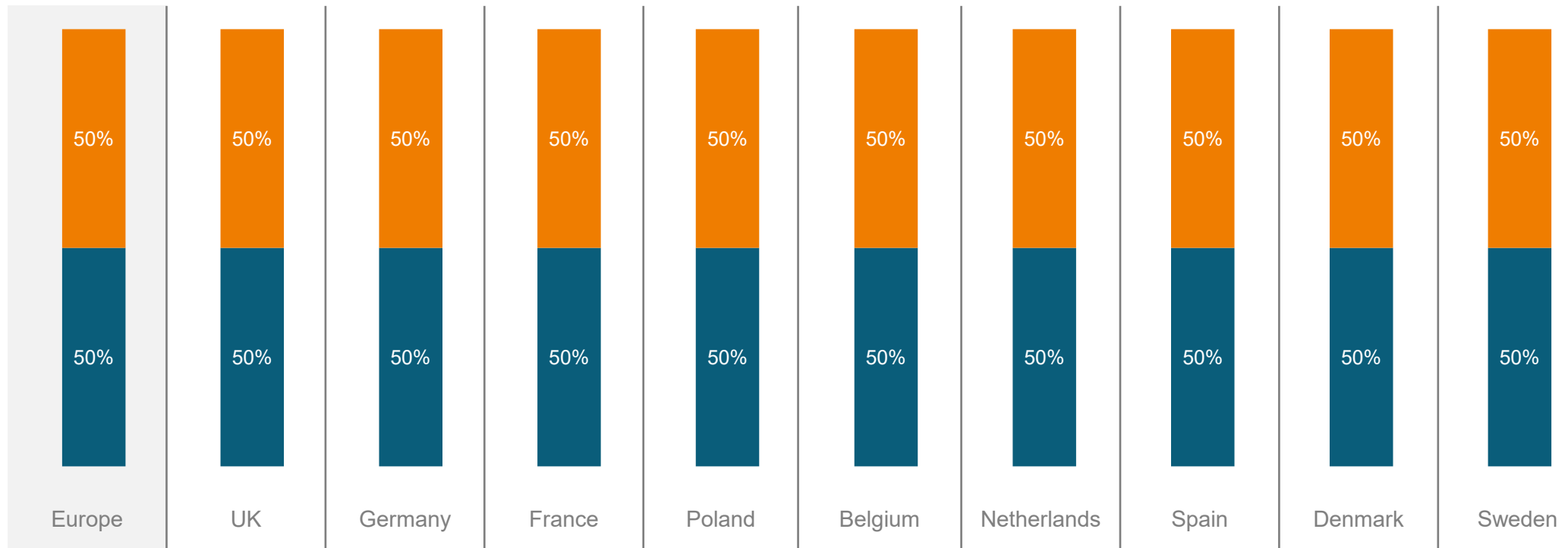
Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Way of getting ordered products from the electrical wholesaler

Approximately what share of the products you order at the traditional specialised installation wholesale do you...?

Get them delivered | Pick up at the wholesaler



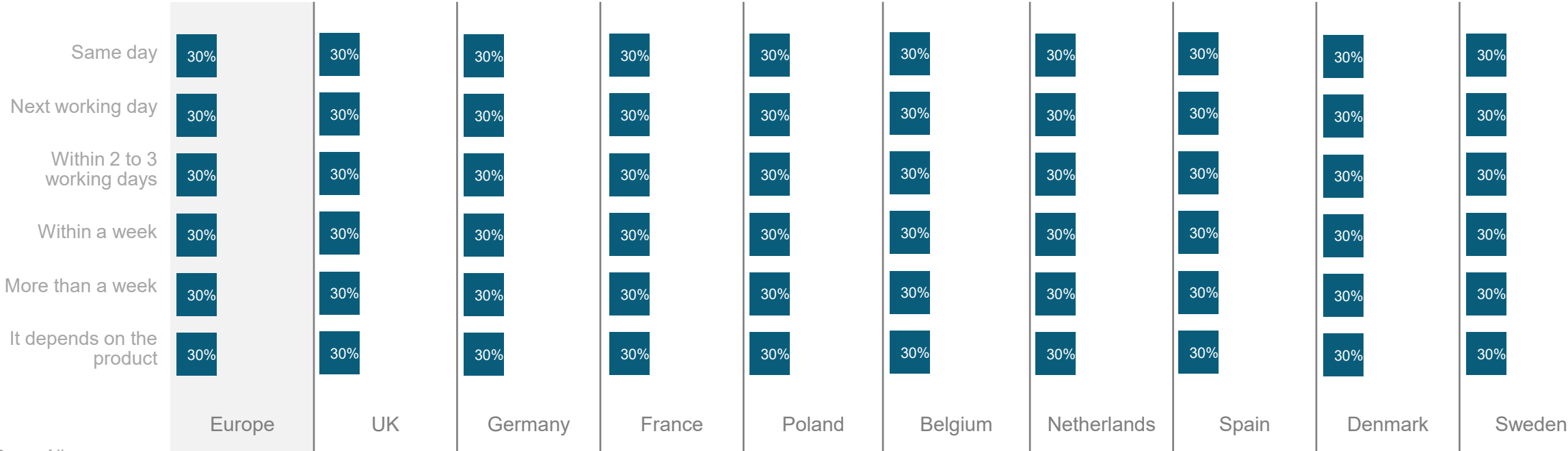
Base: All

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Delivery time expectations

When ordering installation products, what delivery time do you usually want or expect for most of your orders?



Base: All

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

DUMMY DATA

Alternative actions

*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...?*



Base: All

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Second-hand consideration

Would you consider buying second-hand or refurbished installation products from a trusted electrical wholesaler?

	Yes, definitely	Maybe, depending on the product	No, I prefer only new products
Europe	33%	33%	33%
Sweden	33%	33%	33%
Denmark	33%	33%	33%
UK	33%	33%	33%
Germany	33%	33%	33%
France	33%	33%	33%
The Netherlands	33%	33%	33%
Spain	33%	33%	33%
Belgium	33%	33%	33%
Poland	33%	33%	33%

Lorem ipsum dolor sit amer, consectetuer apidiscing elit. Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.



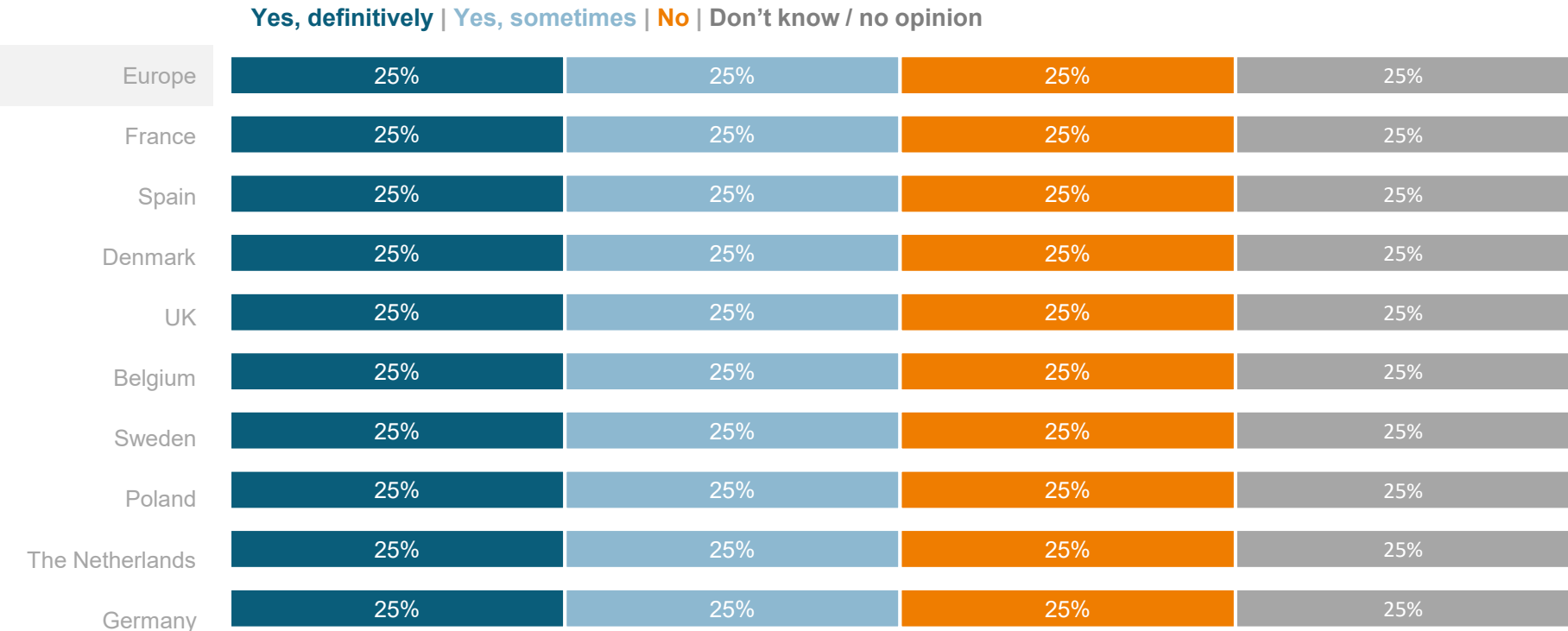
Base: All

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Sustainability influence in purchasing decisions

Q: Do sustainability labels or CO₂ information influence where you choose to buy installation products?



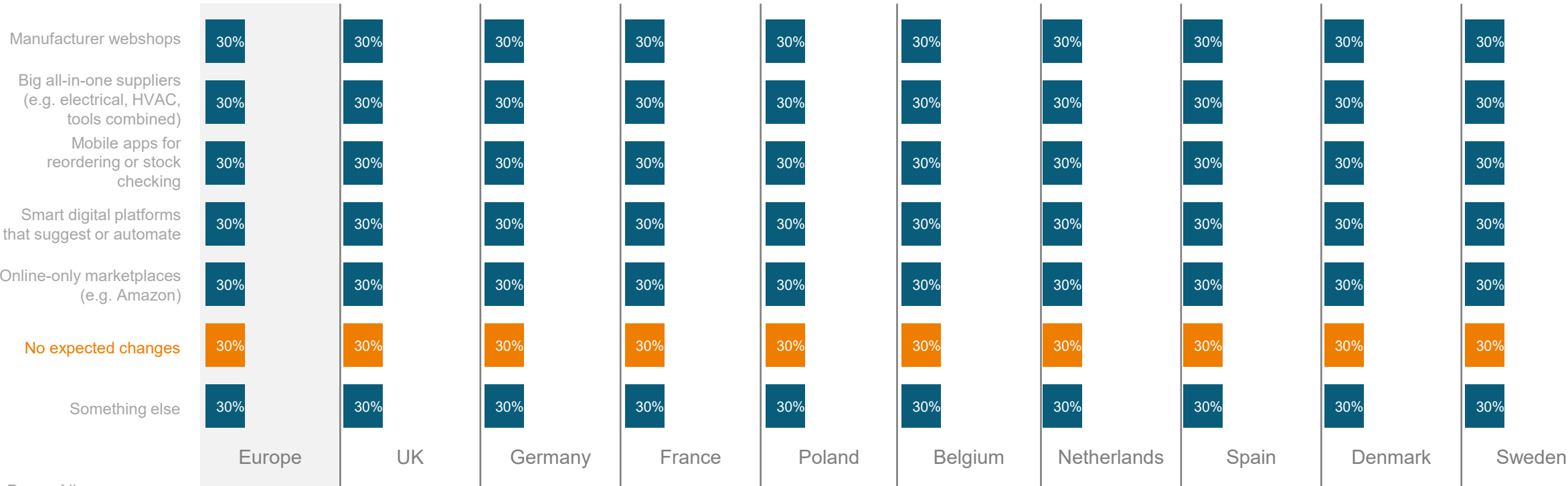
Base: All

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

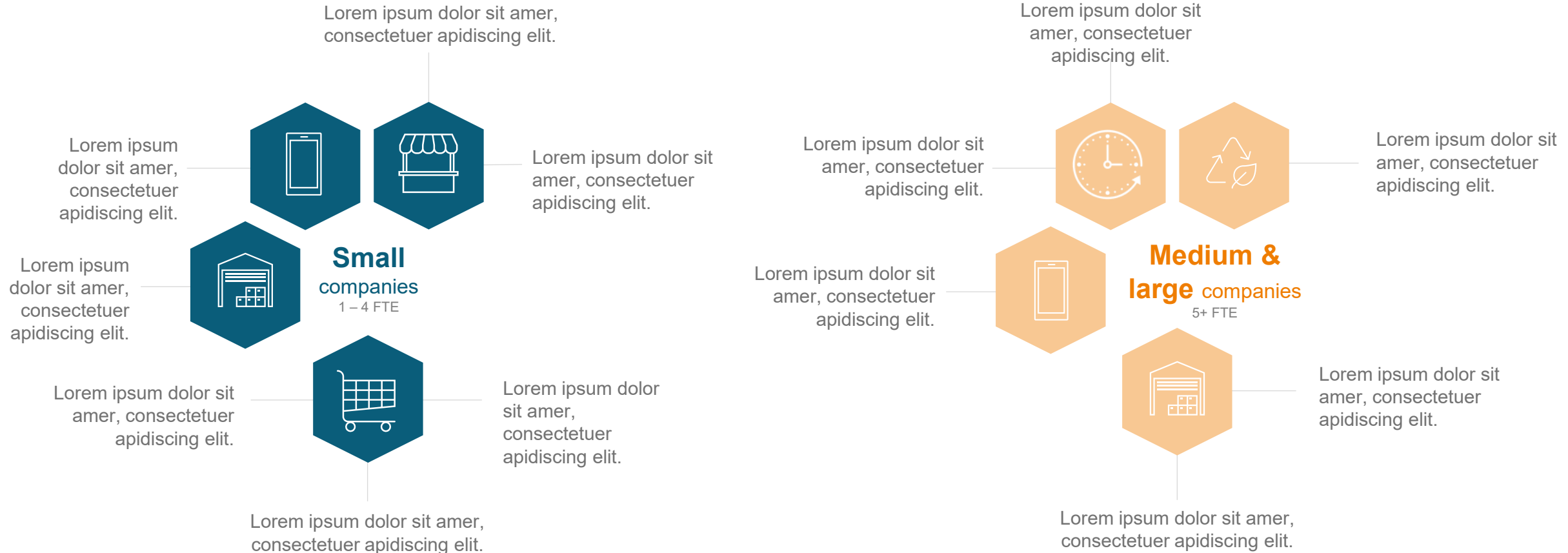
Future expectations

Q: In the next 2 to 3 years, what do you think will most change the way you buy installation products?



Base: All

Buying behaviour in different company sizes



DUMMY DATA

Index

About European Electrical Installation Monitor

Key takeaways

Business development

Theme topic – Purchase channels

Cross country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Spain

Denmark

Sweden

Appendix



Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Distribution of total purchase among channels

Do you buy electrical installation products used in your daily job through the following channels? | Approximately what share of your total spending on installation products is done through each of the following channels?

	% OF INSTALLERS USING THE CHANNEL TOTAL MONEY SPENT ON EACH CHANNEL (SOW)	Δ 2023	SOW BY FTE (2025)		
			1 - 4	5 - 14	15 +
Traditional specialized installation wholesaler	30% 30%	+0%	X%	X%	X%
Traditional building material wholesaler	30% 30%	+0%	X%	X%	X%
Traditional hardware store	30% 30%	+0%	X%	X%	X%
DIY store	30% 30%	+0%	X%	X%	X%
Directly from the manufacturer	30% 30%	+0%	X%	X%	X%
Pure online shop	30% 30%	+0%	X%	X%	X%

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Distribution of product group purchases across channels

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%

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA



Installation
wholesaler

X% buy at specialised wholesalers

Way of ordering products

Now let's focus on how you place orders at electrical installation wholesale.
Approximately what percentage of your orders are done each of the following ways?

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



Way of getting ordered products

Approximately what share of the products you order at the traditional specialised installation wholesale do you...?

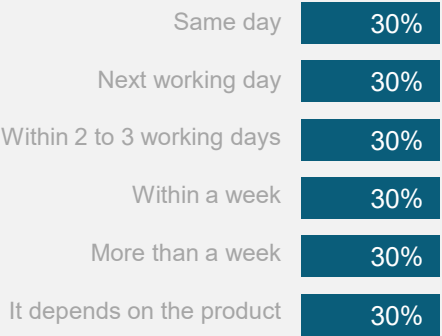
Get products delivered | Picked up at a local wholesale branch



By FTE: 1-4 | 5-14 | 15+ 50% | 50% | 50% | 50% | 50% | 50%

Delivery time expectations

When ordering installation products, what delivery time do you usually want or expect for most of your orders?

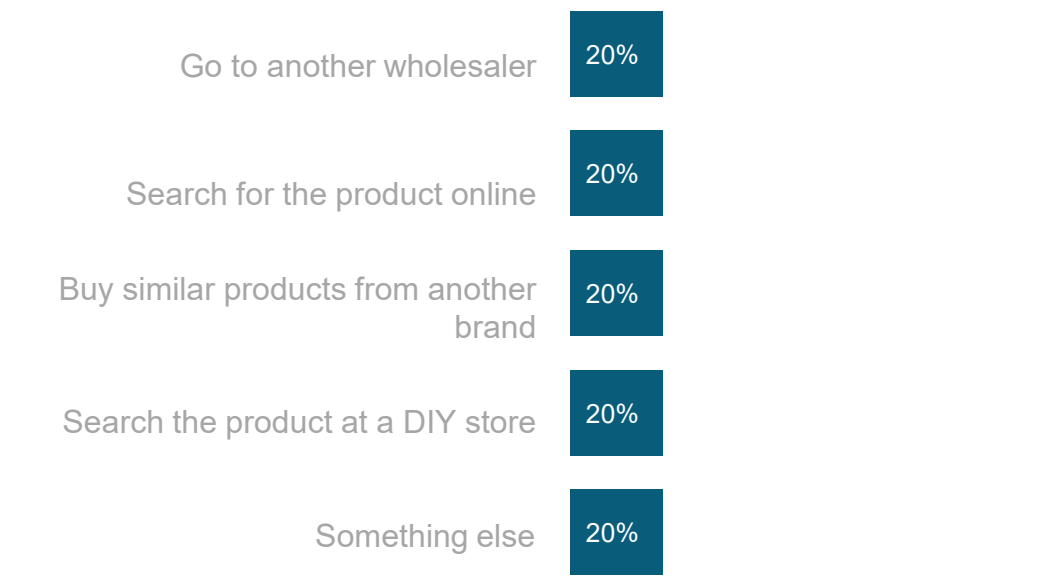


Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Alternative actions

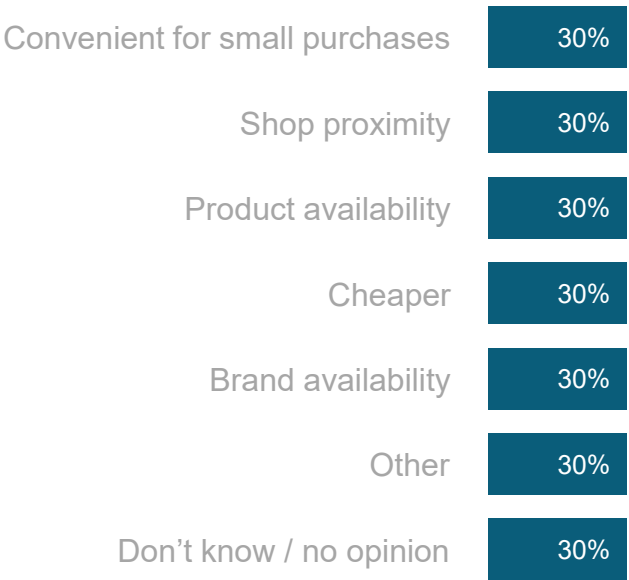
Let's imagine you are searching for a product from a certain brand, but your usual wholesaler does not have that brand at the moment. What will you do...?



Base: All

Alternative choices

Why do you buy at DIY stores instead of specialist installation wholesale?



Don't know / no opinion

30%

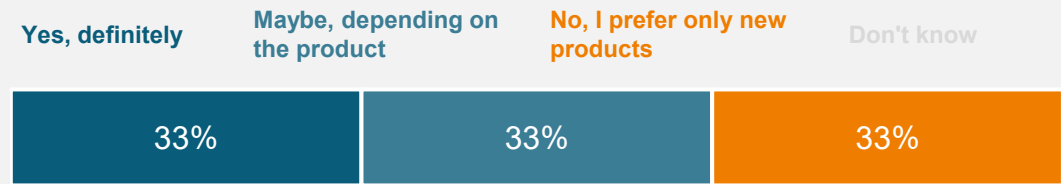
Base: All

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Second-hand consideration

Would you consider buying second-hand or refurbished installation products from a trusted electrical wholesaler?

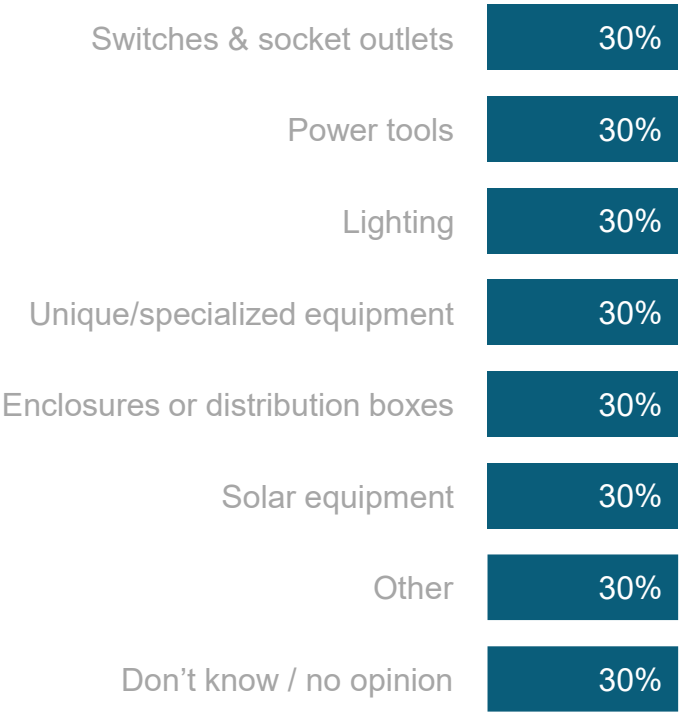


Lorem ipsum dolor sit amer, consectetuer apidiscing elit.
Lorem ipsum dolor sit amer, consectetuer apidiscing elit.
Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

Base: All

Second-hand & refurbished items

For which types of electrical products would you consider second-hand or refurbished?



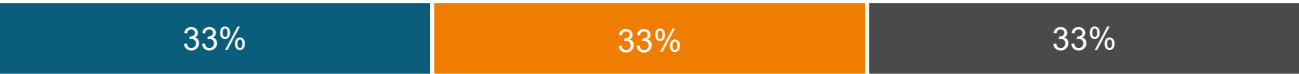
Base: All

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Way of ordering products directly at the manufacturer
Now thinking about the installation manufacturers you buy from directly. Approximately what percentage of your orders there is placed in each of the following ways?

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



ZOOMING IN ON UK
FTE:

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.
Lorem ipsum dolor sit amer, consectetuer apidiscing elit.
Lorem ipsum dolor sit amer, consectetuer apidiscing elit.
Lorem ipsum dolor sit amer, consectetuer apidiscing elit.
Lorem ipsum dolor sit amer, consectetuer apidiscing elit.
Lorem ipsum dolor sit amer, consectetuer apidiscing elit.



Lorem ipsum dolor sit amer, consectetur apidiscing elit.

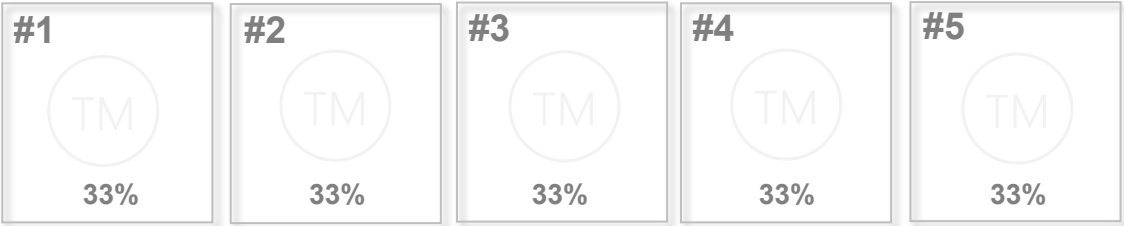


Pure Online

X% buy at pure online shops

X% at installation-specialized | X% at non-specialized

Top 5 pure online shops where products are directly bought
Q: From which pure online shops have you bought installation products most often?



ZOOMING IN ON UK
FTE:

Lorem ipsum dolor sit amer, consectetur apidiscing elit.
Lorem ipsum dolor sit amer, consectetur apidiscing elit.
Lorem ipsum dolor sit amer, consectetur apidiscing elit.



Base: All

Online features

When buying installation products online, do you use any of the following features?

Tools to compare products (e.g. prices, specs, brand)	30%
Reviews or product ratings	30%
Suggestions like “You may also need...”	30%
Online chat or help assistant	30%
None of these	30%

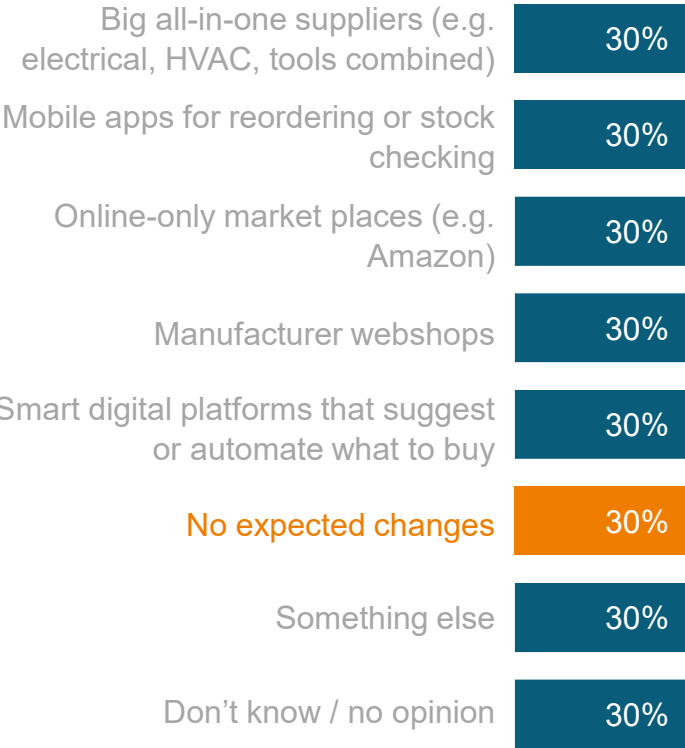
Base: All

DUMMY DATA

Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

Future expectations

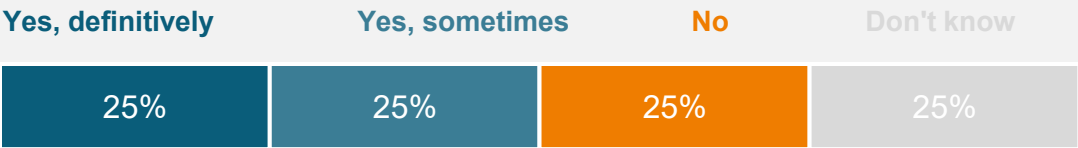
Q: In the next 2 to 3 years, what do you think will most change the way you buy installation products?



Base: All

Sustainability

Q: Do sustainability labels or CO2 information influence where you choose to buy installation products?



Lorem ipsum dolor sit amer, consectetuer apidiscing elit. Lorem ipsum dolor sit amer, consectetuer apidiscing elit. Lorem ipsum dolor sit amer, consectetuer apidiscing elit. Lorem ipsum dolor sit amer, consectetuer apidiscing elit. Lorem ipsum dolor sit amer, consectetuer apidiscing elit. Lorem ipsum dolor sit amer, consectetuer apidiscing elit.

DUMMY DATA

Index

About European Electrical Installation Monitor

Key takeaways

Business development

Theme topic – Purchasing channels

Cross country summary

United Kingdom

Germany

France

Poland

Belgium

The Netherlands

Spain

Denmark

Sweden

Appendix



Respondents' background characteristics

Job title of the interviewed respondents and the company size

Q: What is your position within the company?

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

	UK	Germany	France	Poland	Belgium	Netherlands	Spain	Denmark	Sweden
Owner / Director / Manager	83%	41%	58%	83%	75%	67%	52%	75%	74%
Installer	1%	40%		1%		2%	4%	8%	9%
Painter				1%					
Engineer / designer	1%		1%				2%		
Site manager	2%	1%	1%	1%			2%	2%	6%
Sales	1%	4%				1%	2%		
Purchaser	6%	4%	8%		10%	11%	22%	4%	
Advisor / consultant						1%	1%		
Calculator / Work Planner			22%	1%	10%	5%		2%	
Project manager / leader	3%	7%	10%		3%	6%	3%	2%	8%
1 - 4 FTE	34%	34%	34%	59%	50%	47%	46%	50%	50%
5 - 14 FTE	33%	33%	33%	19%	28%	25%	27%	28%	26%
15+ FTE	33%	33%	33%	22%	23%	28%	27%	22%	24%



USP Marketing Consultancy Corporate Presentation 2025

About USP Marketing Consultancy



Over 30 years internationally operating market research and consultancy agency specialized in the construction, DIY, installation and real estate market.



Dedicated research and market reports.



Active in more than 30 countries per year.

Head Office



NL - Rotterdam

Branch Office



HR - Zagreb

Subsidiary



DE - Dusseldorf



Our Services

USP

DEDICATED MARKET RESEARCH

Our main business area is conducting dedicated, ad-hoc market research worldwide for key stakeholders supplying the construction, installation, home improvement and real estate

MARKET REPORTS

Benefit from a wide variety of ready-made market reports covering a range of topics like BIM, prefab, sustainability, buying behavior and much more, through the eyes of key stakeholders in the value chain

OUR ADDED VALUE

With our 30 years of experience in the industry, USP can do more than just deliver data. Our mission is to provide insights and advice you can build on. We are a sparring partner, instead of a data provider.

OUR GEOGRAPHIC SCOPE

Our reports cover multiple key markets worldwide and in multiple countries at the same time, ensuring comparability and reliability.

Dedicated Market Research



Market Reports




56.750
Phone interviews


66.400
Online interviews


78
Group discussions


1.778
In-depth interviews


1.778
Number of projects


13.600
Phone interviews


26.400
Online interviews


82
Customers


78
Number of market reports

Dedicated Market research

USP



Branding

The more distinct your brand is, the more valuable it will be. Especially in the construction, installation and home improvement market segments, as product differentiation is decreasing and the stakeholders are traditional and relatively brand loyal. USP has 30+ years of experience conducting branding researches in the construction, installation and home improvement markets, both B2B and B2C.



Customer Satisfaction

USP has been conducting many customer journey studies annually, both B2B and B2C, qualitative and quantitative, in the construction, installation and DIY segments. Understanding your customers journey from orientation & inspiration all the way to services and retention are vital to increase your sales and marketing effectiveness.



Customer Journey

Understanding your target groups and being able to use a good segmentation & persona's can greatly increase marketing and sales effectiveness. USP frequently conducts segmentation studies for key stakeholders in the construction, installation and home improvement markets, both B2B and B2C, qualitative and quantitative.



Product Development

As product development plays a vital part in the growth of any business, it's not a surprise that USP frequently gets request to conduct product development studies, both B2B and B2C. Whether it's a concept test or a evaluation of a pre-production product, you can rely on our 30+ years of experience conducting these types of studies in the construction, installation and DIY markets.



Segmentation

Understanding your target groups and being able to use a good segmentation & persona's can greatly increase marketing and sales effectiveness. USP frequently conducts segmentation studies for key stakeholders in the construction, installation and home improvement markets, both B2B and B2C, qualitative and quantitative.



Market Size

To know if further growth is possible and whether your sales are developing in line with market volume, it is important for your business or organisation to understand the total market size and the share of your brand(s). With our track record of 30+ years in conducting market size studies in the construction, installation and home improvement industries, we can assist you in the entire process.



Market Exploration

Perhaps you plan to enter a new market with your product or service? In that case, you need to understand exactly what is going on in that market. We use a range of methods to identify the market characteristics and combined with our three decades of experience conducting market research in the construction, installation and DIY industry, we can deliver insights and advice to build on.



Pricing

USP can lean on 30+ years of market expertise in the construction, installation and home improvement markets to assist you with any kind of pricing studies. Whether it's how to maximize revenue and ROI or what price levels are best suited for a new product launch, USP can provide the insights and advice.



Driver Analysis

Driver analysis can provide insights into the relevance and most important drivers for all of the relevant stakeholders in the construction, installation and home improvement business value chain. Our customers often use this information to develop new products and services. USP has over three decades of experience conducting driver analysis, providing insights and advice to our customers, both B2B and B2C.

304 dedicated project in 2023/2024

Tailor-made projects, driven by your information needs

More than just a data provider, advice & insights based on facts and over 30 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

Market reports

USP

	Target group	Methodology	Total interviews	Countries	Frequency	Themes 2025
European Architectural Barometer 	Architects	Phone interviews	3,400		Quarterly	Orientation, sustainability, prefab & industrialization, BIM and new digital tools
European Contract Monitor 	Contractors	Phone interviews	2,050		Bi-annually	Orientation, future of construction
European Mechanical Installation Monitor 	HVAC Installers	Phone interviews	2,600		Quarterly	Sustainability, services, purchase behavior, training needs
European Electrical Installation Monitor 	Electrical installers	Phone interviews	3,000		Quarterly	Training needs, orientation, purchase behavior, BIM and new digital tools
European Painter Insight Monitor 	Professional painters	Phone interviews	2,300		Annually	Brand health check and efficiency & innovation
European Home Improvement Monitor 	Consumers	Online interviews	26,400		Quarterly	Orientation; rise of digital natives, Purchase Channels; online leaders Brand health check, DIY vs DIFM; outsourcing jobs
European Handyman Monitor 	Handymen	Phone interviews	3,400		Annually	Trend tracking, Activities and product usage, Purchase and decision behaviour, Brand performance scans
European Garden Monitor 	Consumers	Online interviews	6.400		Annually	Smart Garden, Sustainable Garden, City Gardening, Health Gardening, Outdoor living

A selection of USP Marketing Consultancy's clients

USP

Construction

ASSA ABLOY

3M

FLEX
Das Original

Kingspan

VELUX®

TOOLSTATION

BMI

FESTOOL

fischer

KNAUF

DAW

amtico
flooring

Forbo

ROCKWOOL

covestro

REYNAERS
aluminium

WD-40

PPG

BOLTON

AkzoNobel

SIG

Wienerberger

SAINT-GOBAIN

Jika

Installation

ABB

BOSCH

GIRA

DORN
BRACHT

GRUNDFOS

hager

sonepar

Schneider
Electric

LG

PIPELIFE

KALDEWEI

MITSUBISHI
ELECTRIC

legrand

TRILUX
SIMPLY YOUR LIGHT

SAMSUNG

VIESSMANN

Vaillant

REHAU

EMERSON

wavin

GEBERIT

DAIKIN

signify

ROTHENBERGER

Home Improvement

adeo

Orkla
House Care UK

Dulux

tesa

V3

GROHE

Villeroy & Boch

MTD
For & Growing World

Bostik
smart adhesives

KÄRCHER

hansgrohe

UNILIN
FOR SMART LIVING

AkzoNobel

NEWAGE
PRODUCTS

StanleyBlack&Decker

maxeda
DIY Group

DELI HOME

BRIGGS & STRATTON

cromology

Ideal

ShurTech
Brands

Yale

BOLTON
ADHESIVES

PPG

Client's testimonials on market reports

USP

CATRIN KLEIN

Head of Customer &
Market Insights at Hilti



The Contractor monitor reports that we receive from USP provide insights that are fact-based and highly relevant. The reports are easy to assimilate with our internal audience and set foundation for deeper discussions.

DANIEL
ANGELOVSKI

Group Insights Manager
at Velux



The specialized insights in the Home Improvement Monitor are a great source of input for our industry analysis.

MIRYAM SALVADOR

Global Channel Director
at Schneider Electric



Their specialized insights on construction and installation markets allow us to make go-to-market decisions based on factual data. Their customer-centric approach helps us put customer needs at the centre of our decisions.

DALIA GONCIAUSKAITE

Marketing Manager
Architectural
at Covestro



USP is professional, responsive, didactic, and voluntary. It was easy to exchange my thoughts with them.

HARDY JAESCHKE

Senior Manager Market
Research, Market Intelligence
at Vaillant Group



The USP reports help us better understand different B2B target groups, better assess their business situations and enrich our range of knowledge enormously.

ARMIN DIPPING

Senior Manager strategic and
international Marketing at Gira



With the Electrical installation monitor reports we receive from USP we get an overview and first insights on behaviour, relevant topics and trend in the electrical installation industry.

CAROLINE ROQUE

EMEA Consumer and Market
Insights Manager at 3M
Consumer Business Group



The USP team has very strong expertise in the construction and home improvement markets. We are using their detailed home improvement monitor reports very extensively.

JUSTYNA
GUDOWSKA-POHLING

AC EMEA Customer Insights
Manager
at PPG



USP delivered the company good, useful business recommendations and insights, which have accelerated business growth.

*For more testimonials you can visit our [website](#)!

Client's testimonials on dedicated research

USP

GORDON
MURRAY-SMITH



Market Intelligence and Insight
Manager at BMI

USP is a trusted supplier of BMI as they understand our business, are professionals, and are pleasant to communicate with.

PAUL O'DWEYER



Global Consumer Market
Development Manager
at Bostik

Good working relationship between the project team, strong knowledge of the insights and findings from the fieldwork, presented and communicated very clearly in the report.

JOOST MAARSE



Global Lead Circular
Economy
at Grundfos

Delievered as promised and great regular communication towards us as a client.

HENDRIKJE
BUDENBERG



Responsible Marketing &
Communication BU Technical
Insulation at Saint-Gobain
Technical Insulation

With USP there is always a good personal contact and the research results were great.

FEDERICO ITRI



Associate Commercial
Excellence Manager EMEA
at ASSA ABLOY Opening
Solutions

We have a really good cooperation with USP, always great to do research projects together.

SUZANNA
LAMMERTS
VAN BUEREN



Director Business Development
Northern Europe at Somfy

USP thinks along and were able to, besides delivering the insights, brainstorm about the business opportunities.

OLGA KOLOS



Electrician Program Director,
Global at Schneider Electric

We work with USP regularly, they are flexible and provide us with good results.

KATERINE
BRUUN
NIELSEN



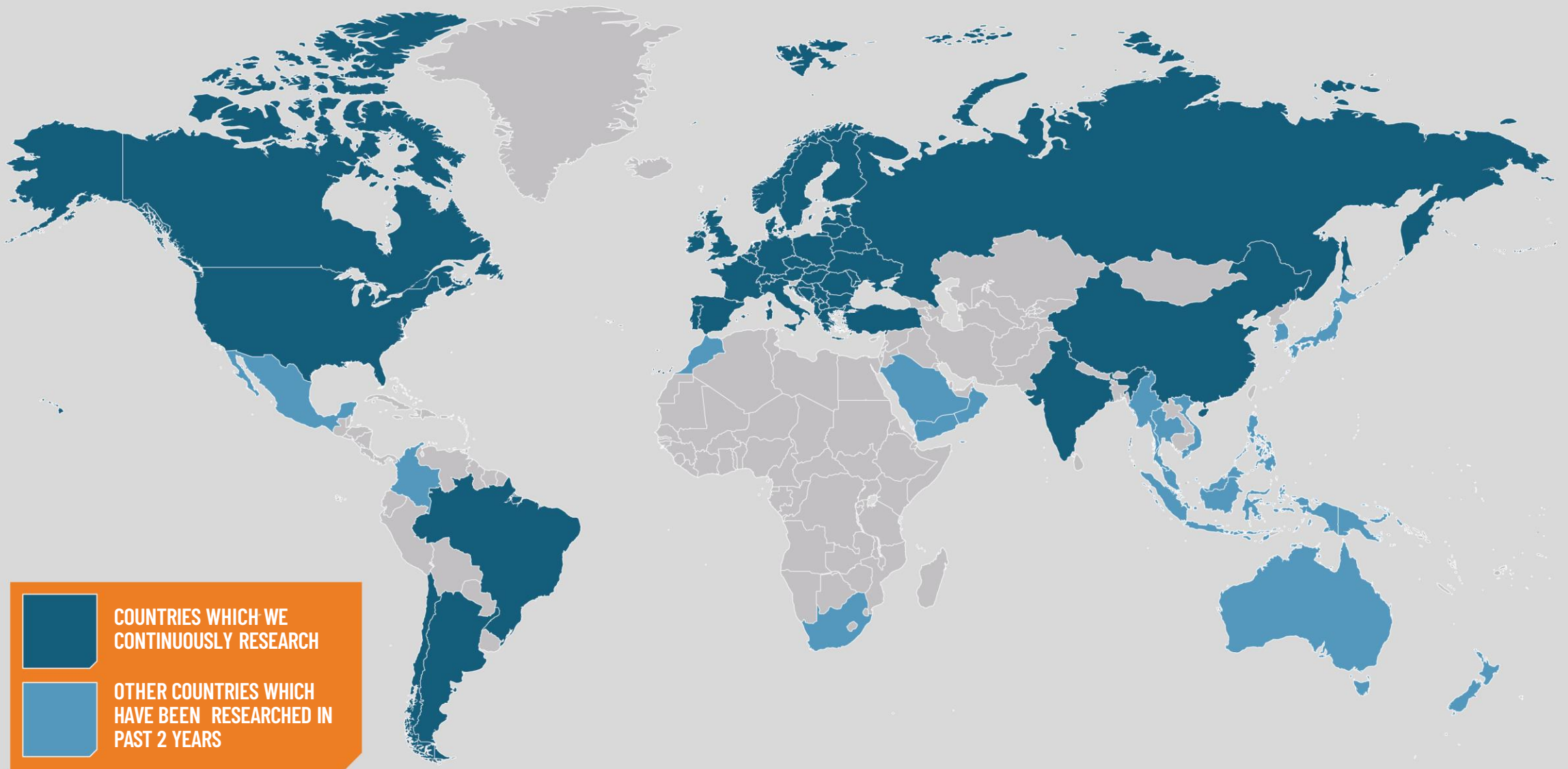
Group insights Manager at Velux

USP always works very structurally and professionally, and we always feel in good hands.

*For more testimonials you can visit our [website](#)!

Our scope

USP



USP Marketing Consultancy

© 20 October 2025, 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.