



European Electrical Installation Monitor 2026

Support needs & Adaptation to emerging trends
May 2026

A product by **USP** Marketing Consultancy

Electrical Installation Monitor 2026

Digitalisation, market pressure, and labour shortages are reshaping the work of electrical installation companies across Europe. Installers are increasingly operating under time, cost, and complexity constraints, making on-site decisions more critical than ever. In this report, we examine how these factors influence installers' choice of products and brands in practice, and how their behaviour is evolving in response to these pressures.

Alongside a European business overview and market outlook, this study provides insight into key industry trends, including BIM, sustainability, prefabrication, labour shortages, and the adoption of AI and digital solutions.

In addition, the study provides insight into:

- Installer decision-making and brand selection in real-world conditions
- Key business drivers and challenges shaping daily operations and future outlook
- Support needs during installation and preferred sources of information
- Training participation, formats, and most relevant content areas
- Customer behaviour under price pressure and resulting trade-offs
- Differences in behaviour and needs by country

This report provides the insights needed to adapt your strategy to evolving installer behaviour, ensuring your organisation remains competitive as complexity, labour shortages, and price pressure reshape the market.

Project team



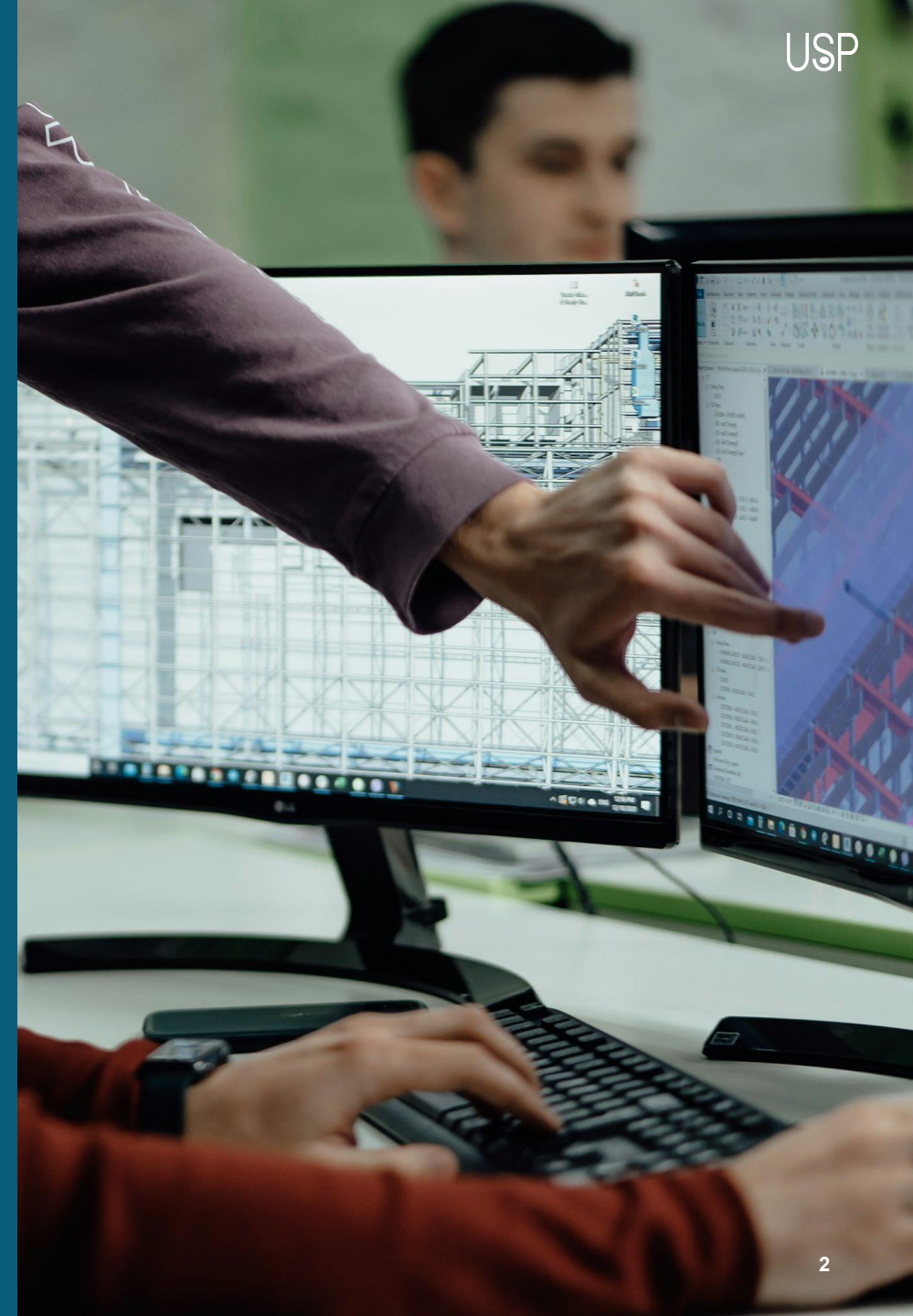
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Key takeaways

Methodology and background

European Business Overview and Market Outlook

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Support needs

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Key takeaway – Market overview

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1

Construction market is weakening, with uneven performance across Europe

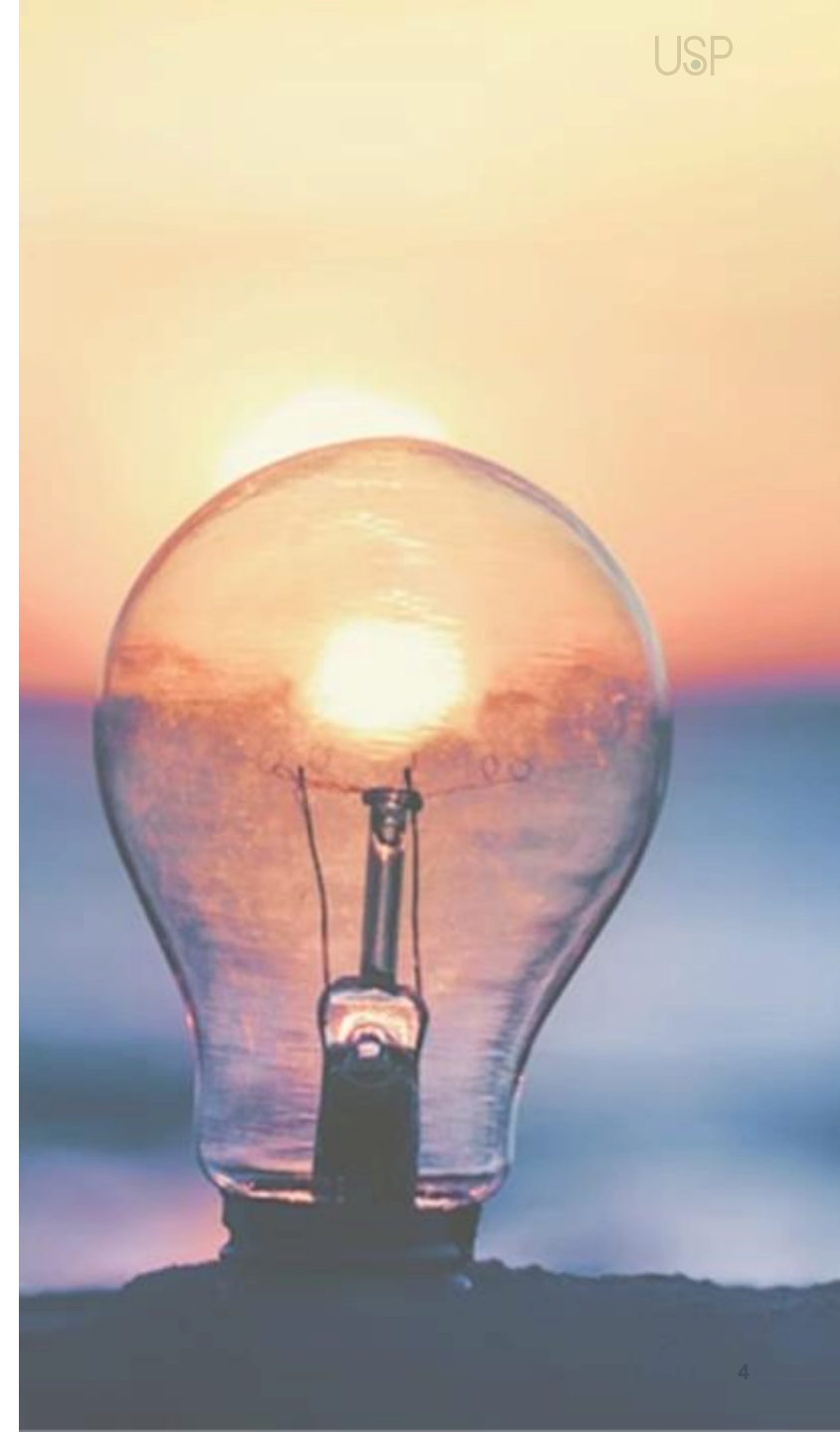
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Installation market remains resilient, supported by backlog and structural demand

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Structural demand supports growth, but increases pressure on installers

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Key takeaway – Industry trends and adoption

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Installers are expanding into more complex and integrated solutions

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BIM adoption is gaining traction, led by larger companies and new-build projects

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Cost pressure is shaping how and where innovation is adopted

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Key takeaway – Support needs

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3

Support needs are increasing and becoming more knowledge-driven

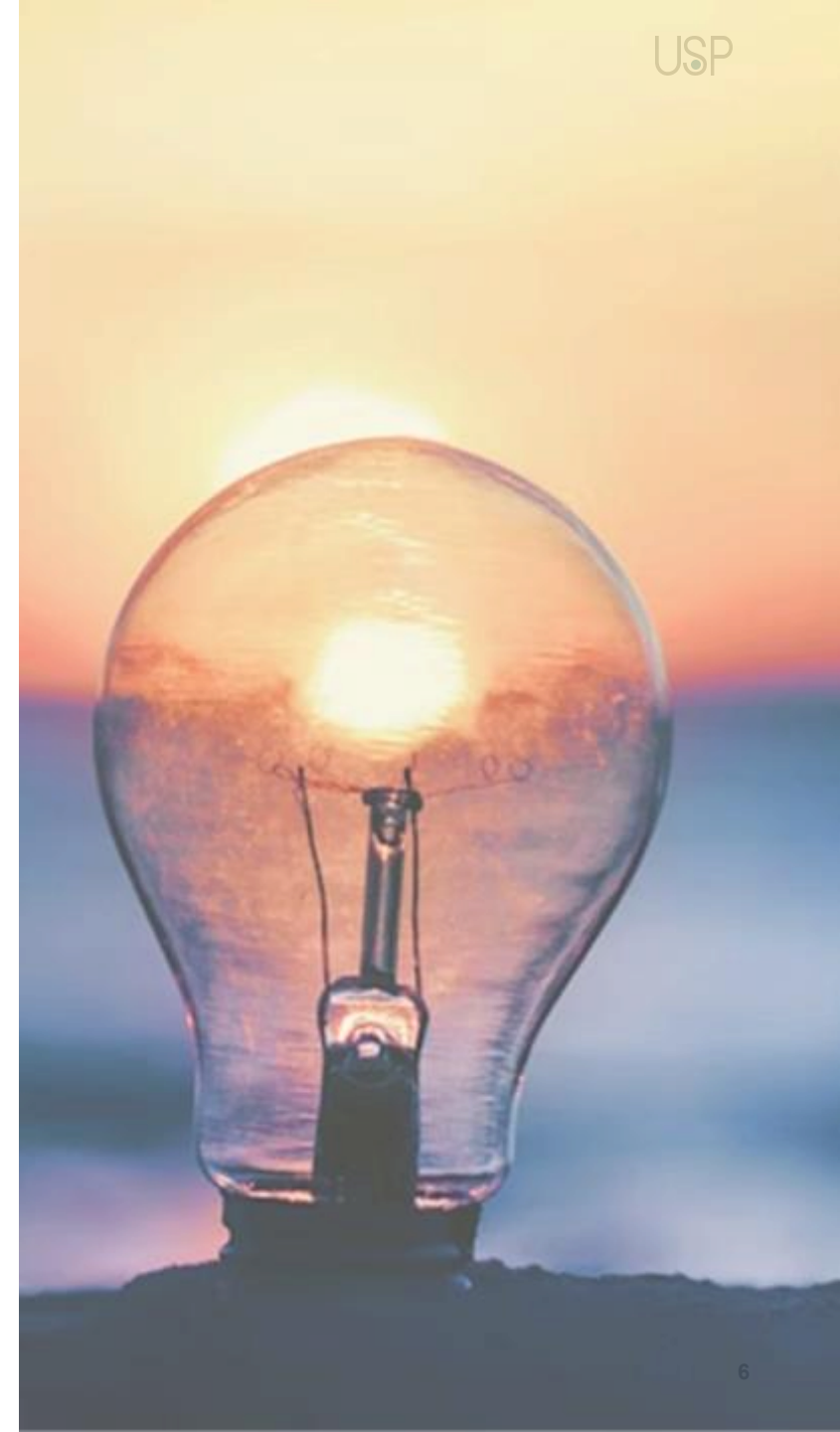
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Manufacturers play a central role as the primary source of support

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Direct, practical support is prioritised, with digital tools playing a growing complementary role

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Strategic implication

The European installation market is being reshaped by the combined impact of electrification, increasing system complexity, and structural labour shortages. While demand remains strong, installers face growing constraints on time, cost, and capacity.

As a result, installer behaviour is shifting. They are becoming more selective in adopting new solutions, relying more heavily on manufacturers and external support, and increasingly using digital tools and AI to manage workload and complexity.

This fundamentally changes how products and brands are evaluated. Beyond performance and price, installers prioritise solutions that are easy to implement, reduce risk, and save time on-site.

For manufacturers, this shifts the basis of competition. Success will depend on the ability to simplify complexity, through intuitive products, clear selection and integration, and strong, accessible support.

Bottom line:

The winners in this market will be those who reduce complexity for installers.



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Methodology and target audience

To track behaviour and trends in the European electrical installation market, we conduct a yearly market study based on telephone interviews with registered electrical installation companies in seven major European markets.

Who we interview

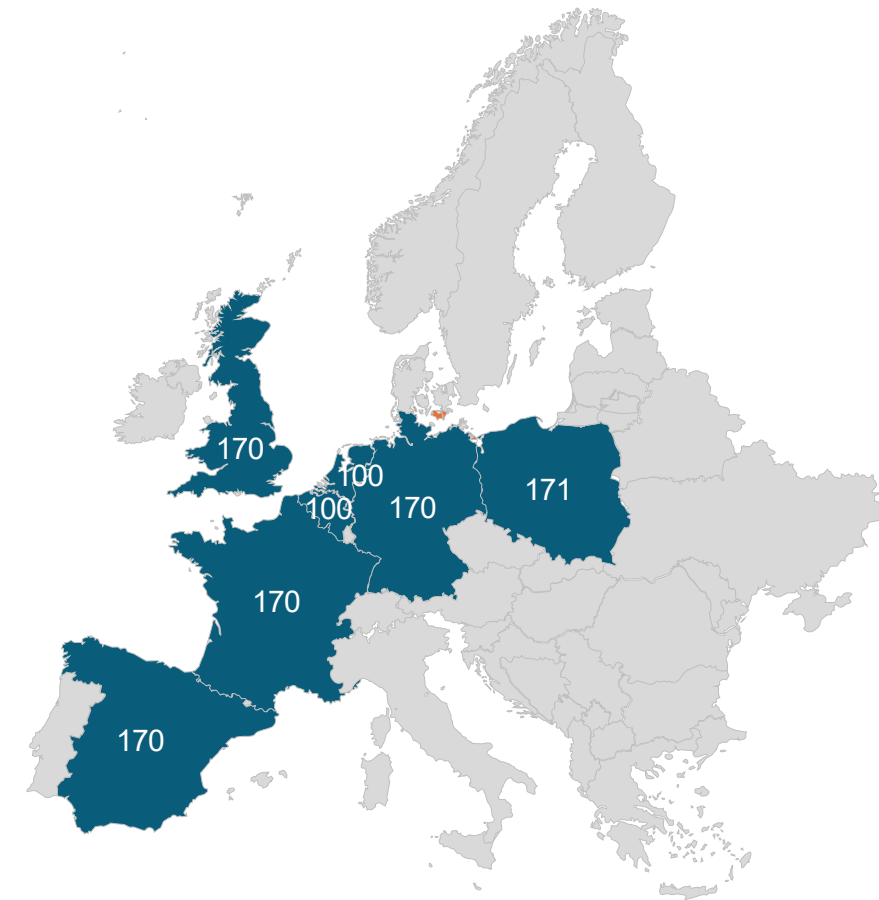
Companies that provide electrical installation services (often alongside other activities such as HVAC or plumbing). Mostly owners, directors or purchasers. Results per country are weighted so that three company size groups (1–4 FTE, 5–14 FTE, 15+ FTE) have equal impact on the total, preventing the overrepresentation of small companies.

How we collect data

USP uses an international database of electrical installation companies that is continuously updated. Respondents are not part of a fixed panel; the sample changes each wave. Interviews are conducted by our fixed local fieldwork partners via telephone, ensuring sufficient and reliable sample sizes in each market. Data was collected in March 2026, during a period of increased geopolitical tensions in the Strait of Hormuz.

The topic of 2026

- Installers' support needs and
- adaptation to emerging trends



About the 2026 Business Context & Market Outlook questions

Respondents were asked the following questions about BIM and Digital Tools:

- Does your company currently provide any of the following services?
- In addition to the core services, which of the following activities does your company currently carry out?
- What is your position within the company?
- Including yourself, how many full-time employees does your company have in total, across all branches?
- Compared to 2025, has the total number of full-time employees in your company...?
- Approximately what percentage of your company's total turnover comes from...?
- Approximately what percentage of your residential turnover comes from new build projects?
- Approximately what percentage of your commercial turnover comes from new build projects?
- How large is your current order book portfolio? For how many months will you be able to keep your current staff working?
- What do you expect will happen to the economy next year compared with this year? The economy will...?
- Which of the following segments do you expect to grow the most in your market over the next few years?
- Looking ahead to 2027, how do you expect your company's turnover to develop compared to 2025?

About the 2026 Market Practices & Trend Indicator questions

Respondents were asked the following questions about BIM and Digital Tools:

- Do you use/ install prefabricated products or systems in your projects?
- What percentage of your total installation projects use prefabricated components?
- Which of the following best describes your familiarity with Building Information Modelling (BIM)? For which electrical products/ application areas do you use BIM?
- What share of your annual turnover comes from projects in which BIM is implemented? What features of BIM are most relevant for a company like yours?
- In what share of your residential and non-residential projects is sustainability (e.g. energy efficiency, carbon footprint, use of recycled materials) taken into account or asked for?
- To what extent are the following types of your customers open and willing to pay for sustainable installation solutions?
- Does your company experience a shortage of labour (professional electrical installers) in your own work practice?
- What share of your total annual purchase of installation products is spent via the following channels, regardless of whether ordering online or offline?
- Do you expect to be confronted with a shortage of labour in your practice in the coming five years?
- Do you use any tools that include Artificial Intelligence (AI), like ChatGPT, Microsoft Copilot, or built-in AI features for professional purposes?

About the 2026 theme questions ^(1/2)

Respondents were asked the following questions about BIM and Digital Tools:

- In which situations do you most need support during your work?
- When you need support or information for an installation, where do you usually turn first?
- Thinking about the training you attended in 2025, roughly how many sessions were...?
- How do you expect the format of your company's training to evolve in the coming years?
- Who provided most of the training you attended in 2025?
- What would be the most relevant topics for training for you and/or your employees?
- Which of the following manufacturer support services are most valuable to you? Please rank these from most valuable (1) to least valuable (6), using each number once.
- Which of the following additional or future digital support services would be most valuable to you?
- Do you find the AI chatbots on manufacturers' websites helpful as a support tool in your work?
- Which of the following currently has the biggest influence on your daily business?
- We see in many surveys that customers start to consider price more, while products and technologies are also becoming more complex. When you present quotes that are more expensive than before, how do customers usually react nowadays?
- When customers push for the lowest upfront cost, what is most often compromised?
- Roughly what share of the electrical products you install today are private-label or lower-cost brands, rather than manufacturer brands?
- For which type of products are you more open to private label or lower-cost brands (budget alternatives)?

About the 2026 theme questions (2/2)



















Respondents were asked the following questions about BIM and Digital Tools:

- When your preferred / first option for the installation is not available or is significantly more expensive, what do you usually do?
- Over the past year, what share of your installation/ retrofit/ maintenance projects included connected/smart systems, products, or components?
- For which of the following tasks do you use dedicated professional software, apps, or online platforms?
- Compared to 1 to 2 years ago, has AI changed the way you find information or make decisions in your work?
- In which of the following situations do you now use AI tools instead of, or before, other sources?
- What do you see as the biggest challenge for your business in the next 2-3 years?

Respondent background characteristics

Position and 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?

Europe								
Owner/ Director/ General Manager	 10%	10%	10%	10%	10%	10%	10%	10%
Project manager	 10%	10%	10%	10%	10%	10%	10%	10%
Installer/ Electrician	 10%	10%	10%	10%	10%	10%	10%	10%
Purchaser/ Procurement	 10%	10%	10%	10%	10%	10%	10%	10%
Calculator/ Work planner/ Estimator	 10%	10%	10%	10%	10%	10%	10%	10%
Sales/ Business development	 10%	10%	10%	10%	10%	10%	10%	10%
Advisor/ Consultant	 10%	10%	10%	10%	10%	10%	10%	10%
Technical director/ Head of engineering	 10%	10%	10%	10%	10%	10%	10%	10%
1 to 4 FTE	 20%	20%	20%	20%	20%	20%	20%	20%
5 to 14 FTE	 20%	20%	20%	20%	20%	20%	20%	20%
15 or more FTE	 20%	20%	20%	20%	20%	20%	20%	20%

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Share of turnover by project type








Approximately what percentage of your company's total turnover comes from...? Approximately what percentage of your residential turnover comes from new build projects?
 Approximately what percentage of your commercial turnover comes from new build projects?

Segment	Europe							
Residential projects	33%	33%	33%	33%	33%	33%	33%	33%
Commercial projects	33%	33%	33%	33%	33%	33%	33%	33%
Infrastructure and industrial projects	33%	33%	33%	33%	33%	33%	33%	33%
Residential								
New build	33%	33%	33%	33%	33%	33%	33%	33%
Renovation	33%	33%	33%	33%	33%	33%	33%	33%
Commerical								
New build	33%	33%	33%	33%	33%	33%	33%	33%
Renovation	33%	33%	33%	33%	33%	33%	33%	33%

Installers are moving beyond traditional electrical work, expanding into EV, smart systems, and energy solutions to capture new growth opportunities.

Electrical installation activities installers are involved in

In addition to the core services, which of the following activities does your company currently carry out?

	Overall							
EV charging station installation	33%	33%	33%	33%	33%	33%	33%	33%
Installation of smart/ connected systems	33%	33%	33%	33%	33%	33%	33%	33%
Design/ assembly of electrical panels	33%	33%	33%	33%	33%	33%	33%	33%
Solar/ PV panel installation	33%	33%	33%	33%	33%	33%	33%	33%
Battery storage installation	33%	33%	33%	33%	33%	33%	33%	33%

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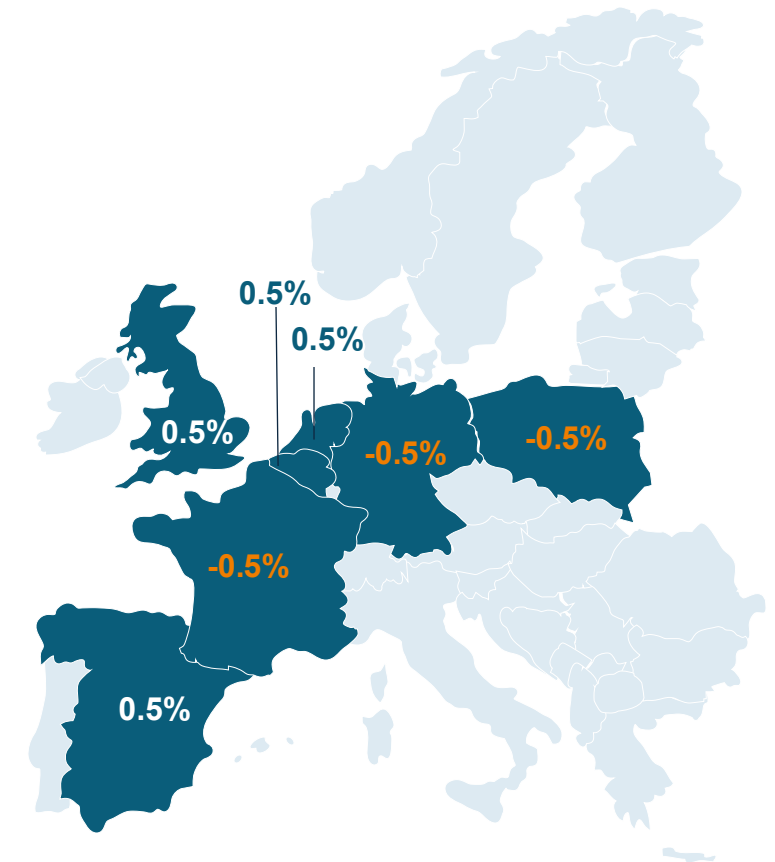
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Orderbook in months



Global economic outlook (2027)

Grow | Remain Stable | Decline | Don't know



Business outlook (2027)



Sources: ¹The Guardian – EV sales in Europe (Apr 2026); ²The Guardian – Clean energy meets global electricity demand growth (Apr 2026); ³Reuters – France accelerates electrification measures (Apr 2026)

Note: Data was collected in March 2026, during a period of increased geopolitical tensions in the Strait of Hormuz.

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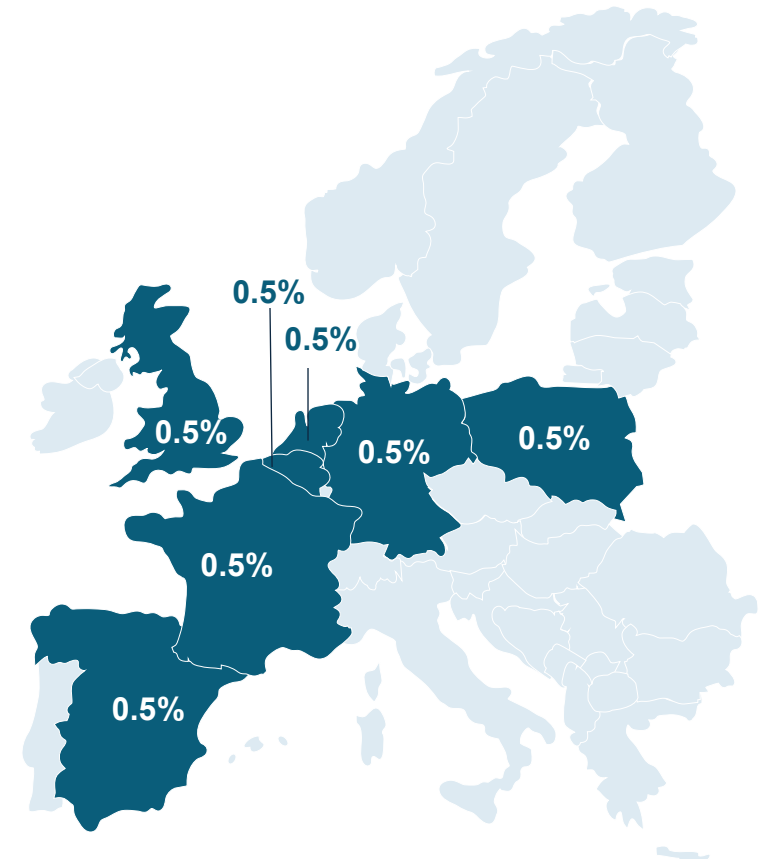
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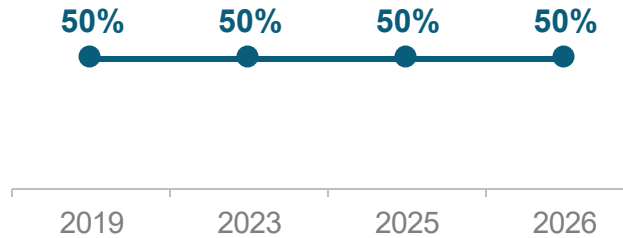
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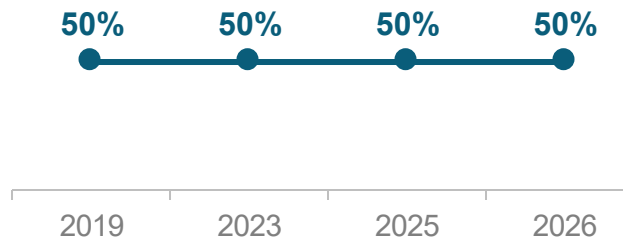
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Experience labour shortage



Expectation of labor shortage in the next 5 years



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X%

of European installers use tools that include AI



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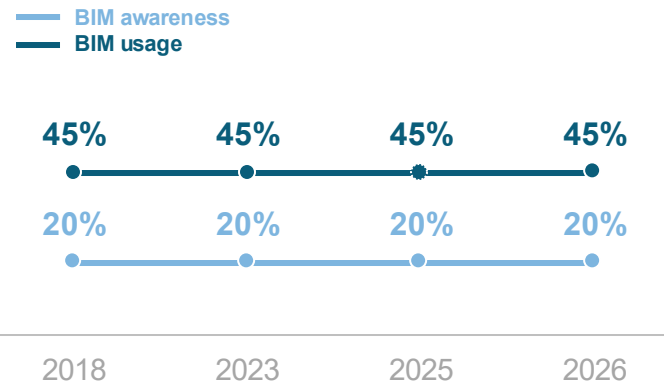
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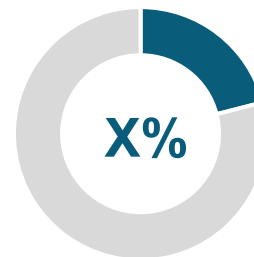
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BIM awareness and usage development



Turnover coming from BIM projects – BIM users



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BIM usage

Segment differences

Mainly residential

Mainly non-residential

X%

X%

Age differences

45 and younger

45+ years

X%

X%



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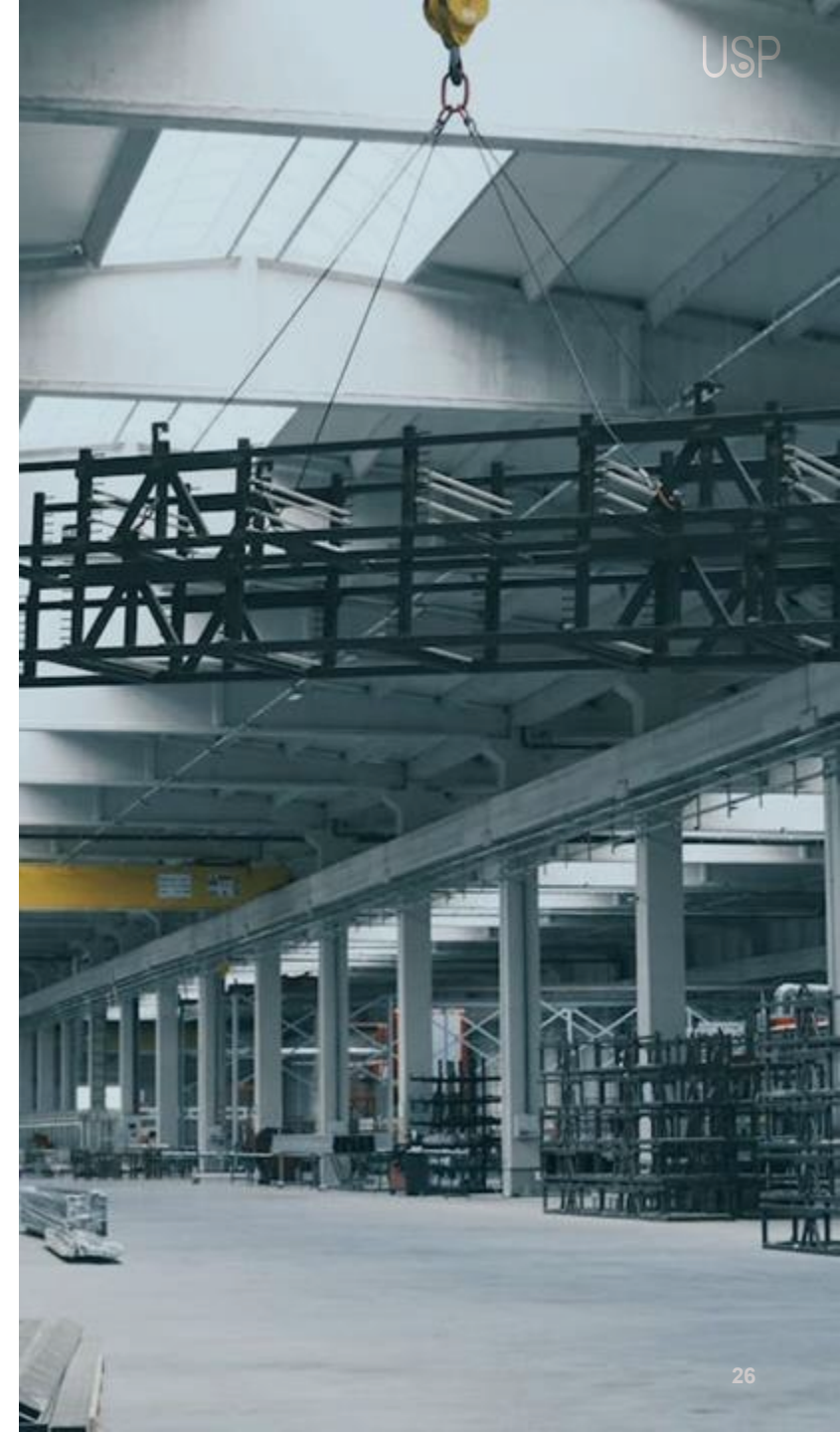
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X% of European installers use prefabricated products or systems

Prefabricated components are used in

X% of the projects



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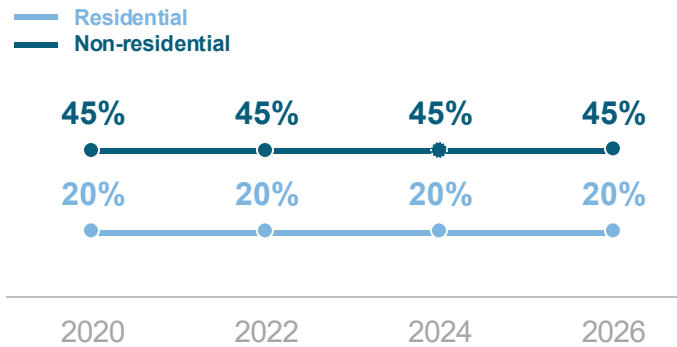
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Share of projects where sustainability is taken into account



Willingness to invest in sustainability



Sources: ¹Reuters – EU reduces sustainability law requirements (Feb 2026); ²Reuters – France accelerates electrification measures (Apr 2026)



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Share of wallet per purchase channel

Channel	2026	2021
 Specialised e-installation wholesale	10%	10%
 General building materials wholesale	10%	10%
 Hardware stores	10%	10%
 DIY stores	10%	10%
 Directly from manufacturer	10%	10%
 Pure online shops	10%	10%
 Other	10%	10%



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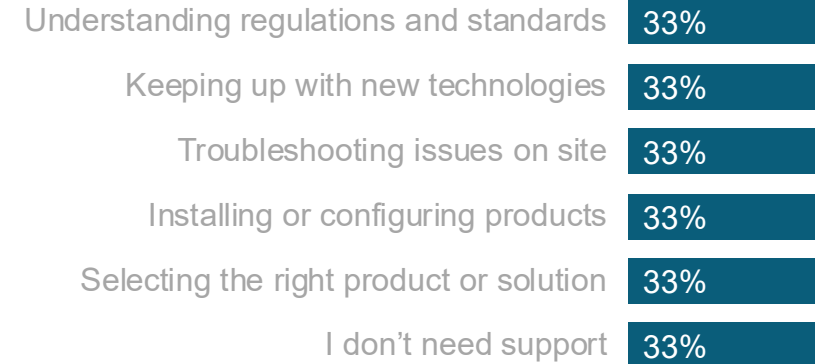
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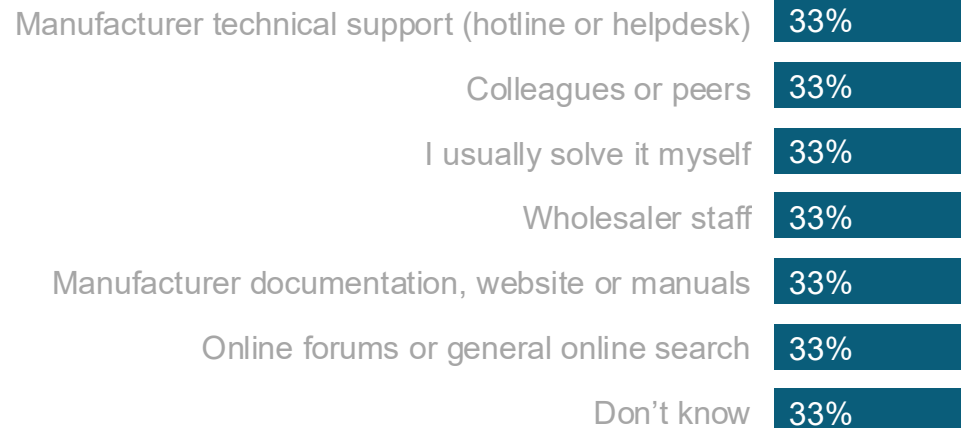
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Main areas where electricians need support



Primary sources of support



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Most valuable manufacturer support services

	#1	Direct access to manufacturer technical support (hotline or chat)	10%
	#2	On-site support	10%
	#3	Short, practical training linked to real installations	10%
		Prefab or pre-configured solutions that reduce installation time	10%
	#4-6	Digital tools that help select, size, and configure the right products for a job	10%
		AI-assisted troubleshooting or installation guidance	10%

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Number of training

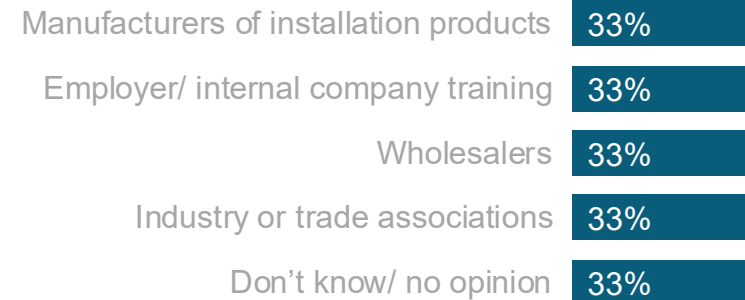
Face-to-face

10

Online

10

Training providers



Most relevant training topics

	#1	New products & innovations	10%
	#2	Regulatory compliance	10%
	#3	Installation best practices	10%

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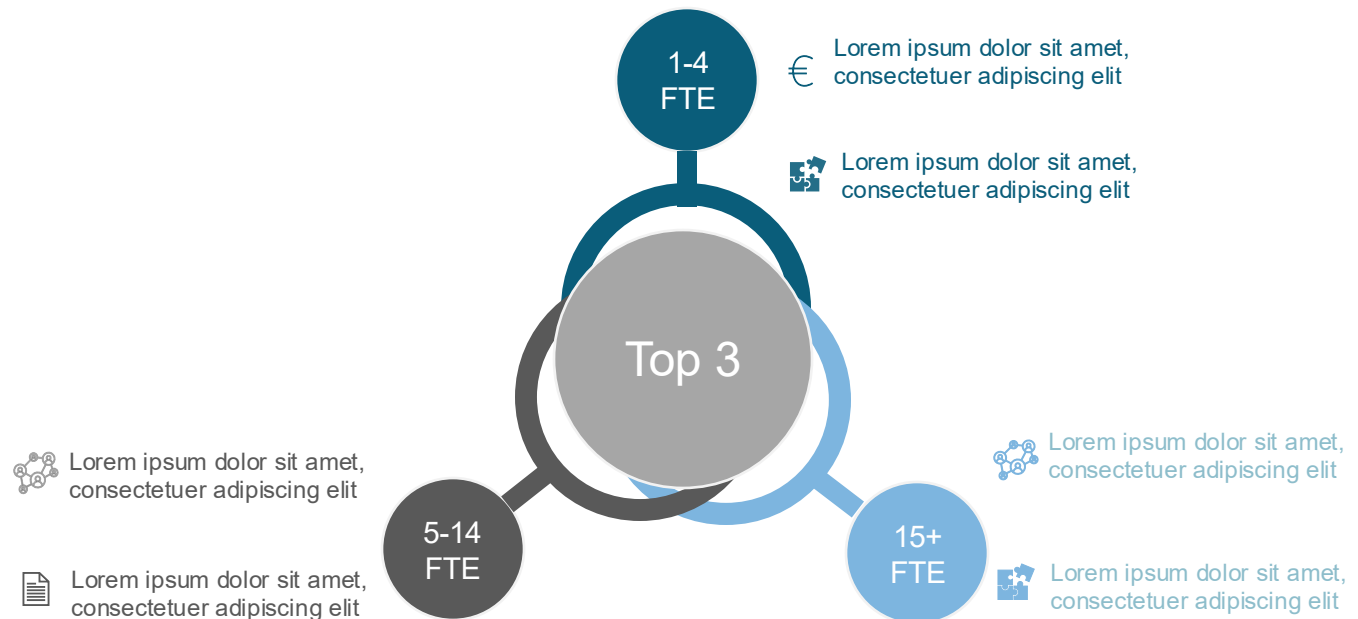
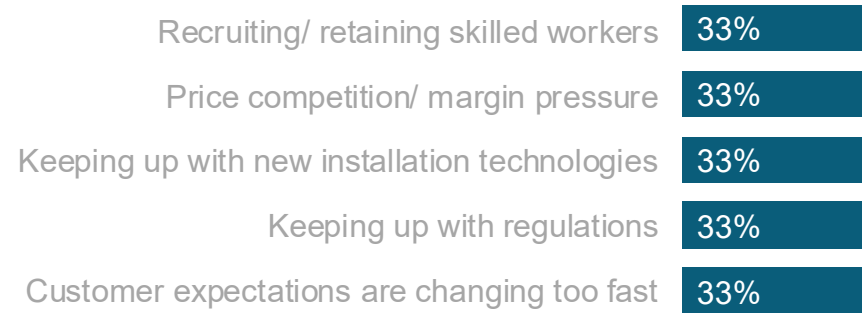
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Key business challenges (next 2–3 years)



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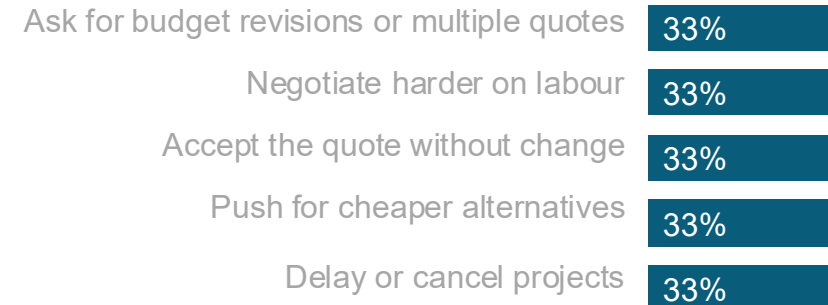
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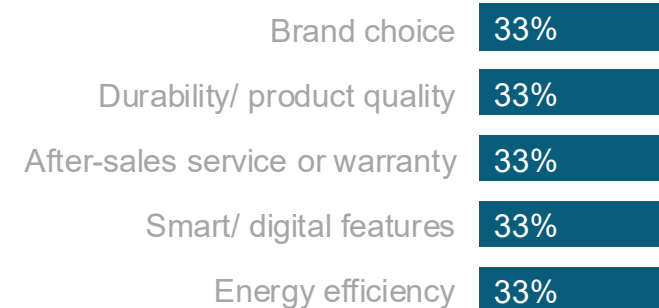
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Customer response to higher-priced offers



Trade-offs when prioritizing lowest cost



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Support needs

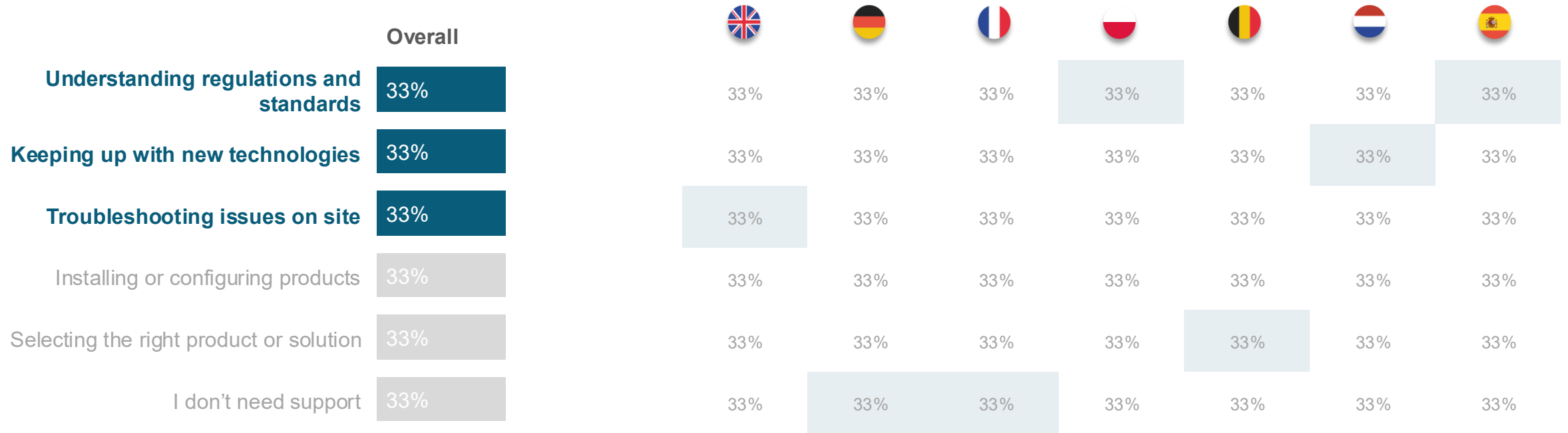
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Support need areas

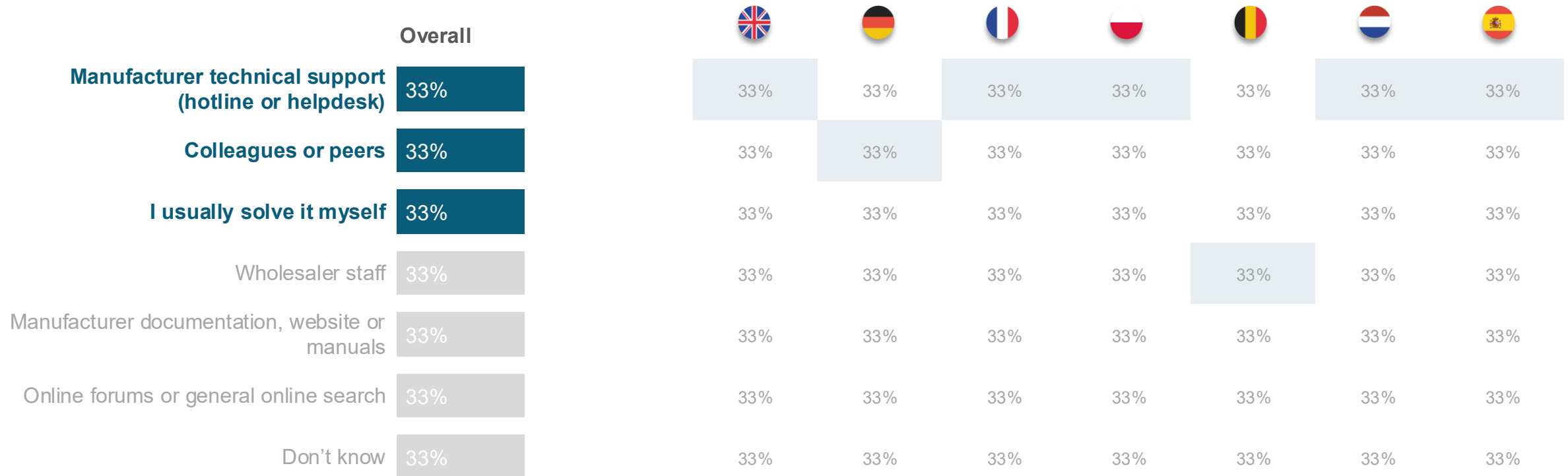
In which situations do you most need support during your work?



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Support need providers

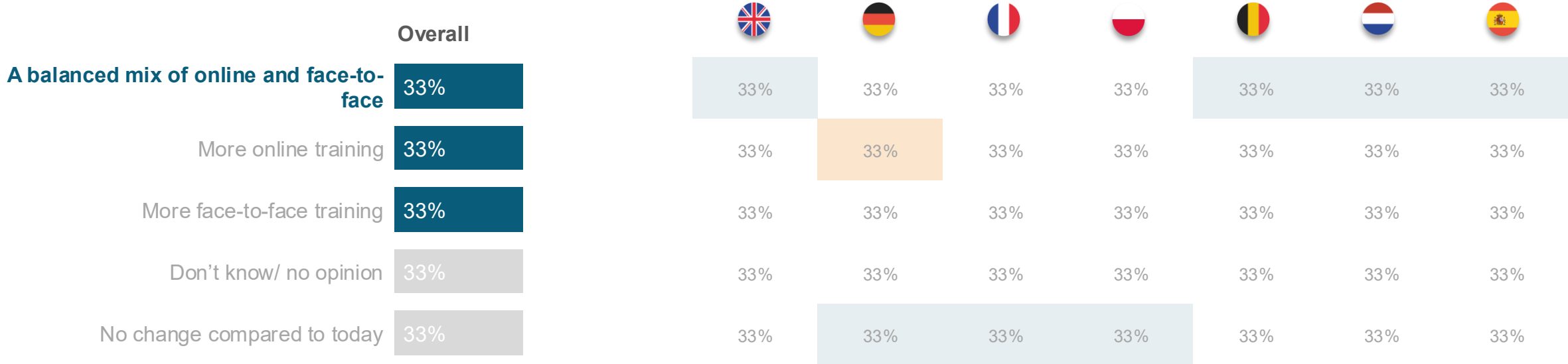
When you need support or information for an installation, where do you usually turn first?



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Training development expectations

How do you expect the format of your company's training to evolve in the coming years?



N (total)=359, UK=69, DE=60, FR=55, PL=52, BE=35, NL=34, ES=54

Avg number of training attended in 2025

Face-to-face	5	5	5	5	5	5	5	5
Online	5	5	5	5	5	5	5	5

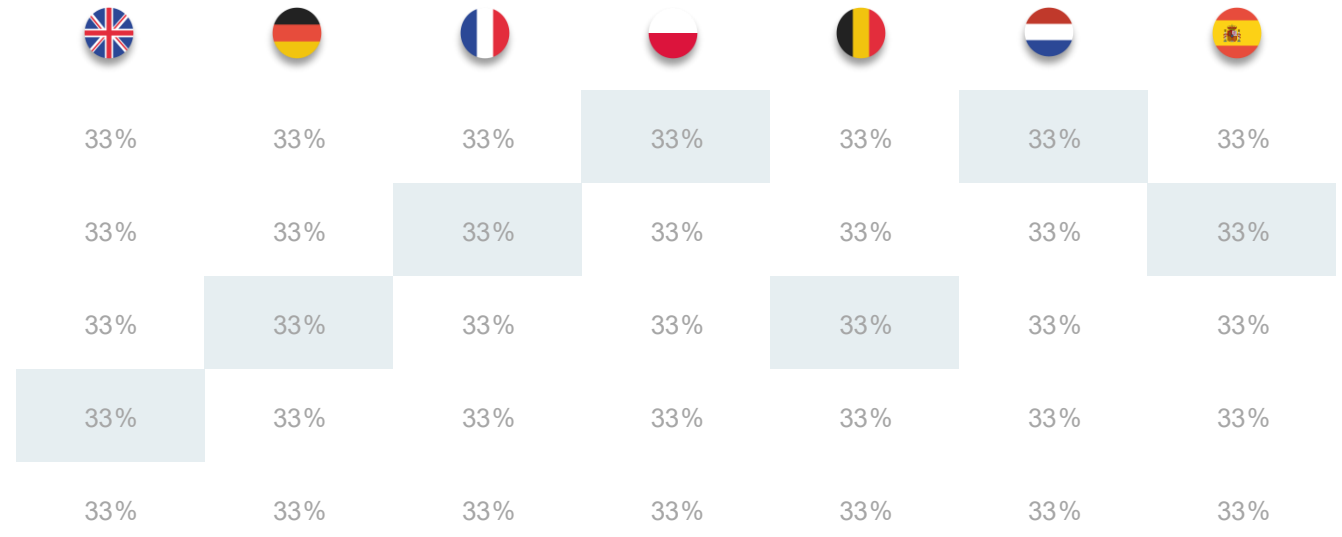
N (total)=501, UK=83, DE=82, FR=84, PL=78, BE=50, NL=49, ES=75

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Training providers

Who provided most of the training you attended in 2025?

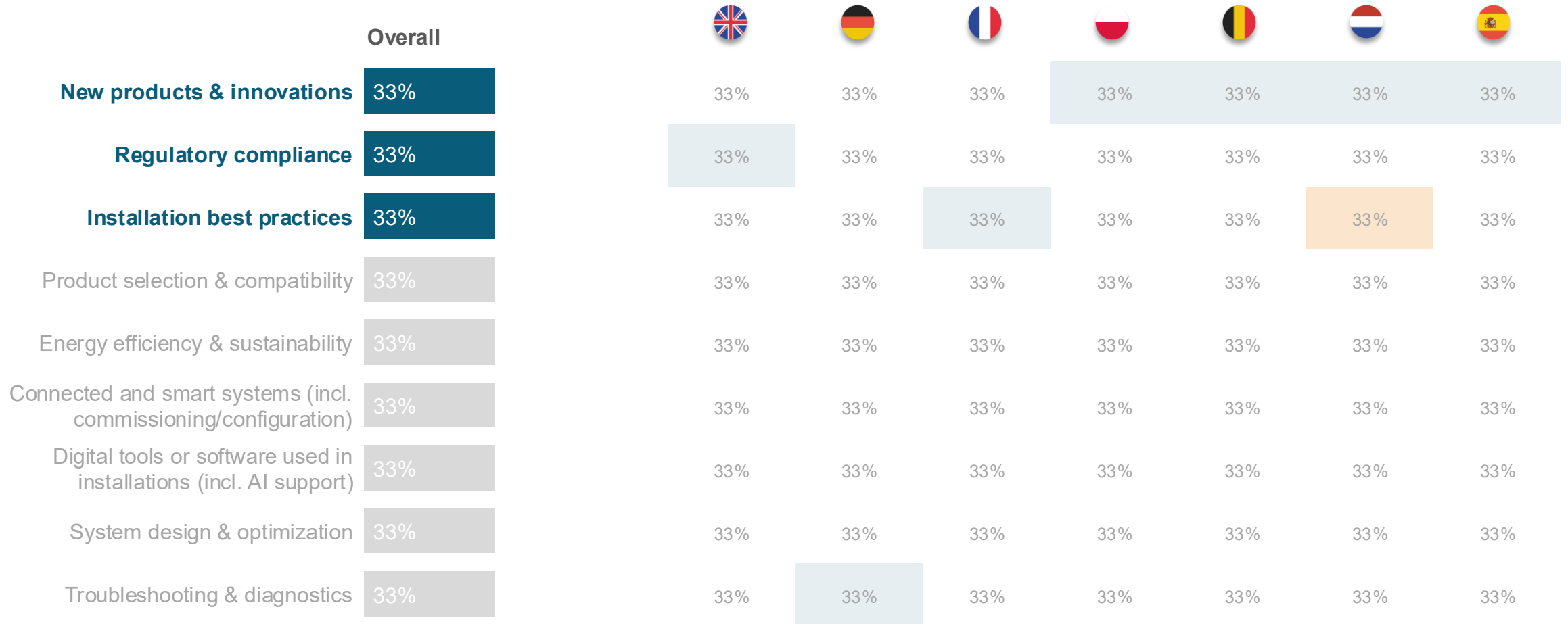
	Overall
Manufacturers of installation products	33%
Employer/ internal company training	33%
Wholesalers	33%
Industry or trade associations	33%
Don't know/ no opinion	33%



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Training topics

What would be the most relevant topics for training for you and/or your employees?

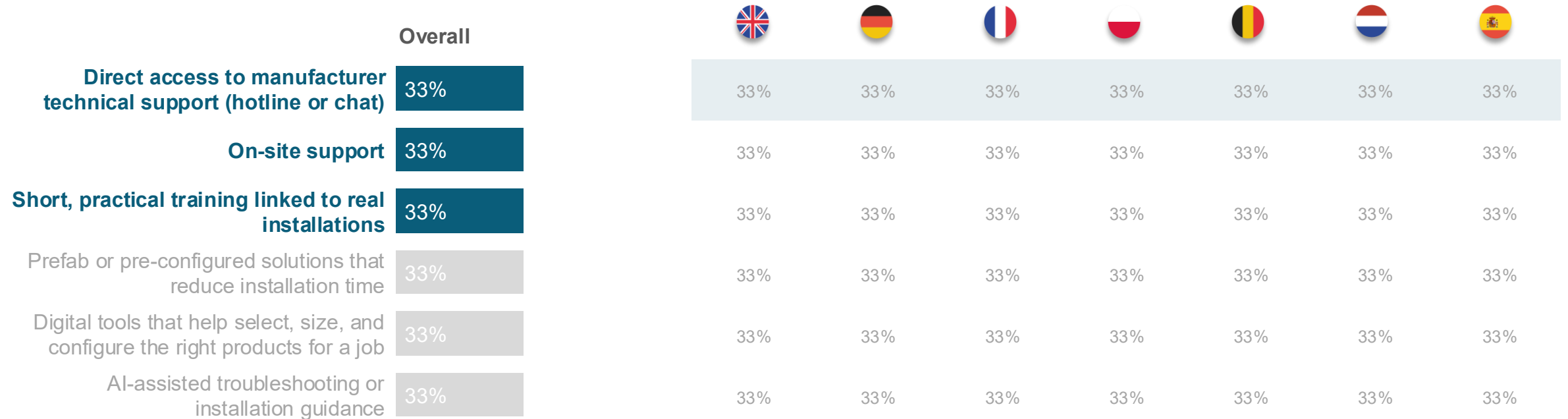


N (total)=437, UK=64, DE=77, FR=81, PL=60, BE=38, NL=42, ES=75

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Manufacturer support services

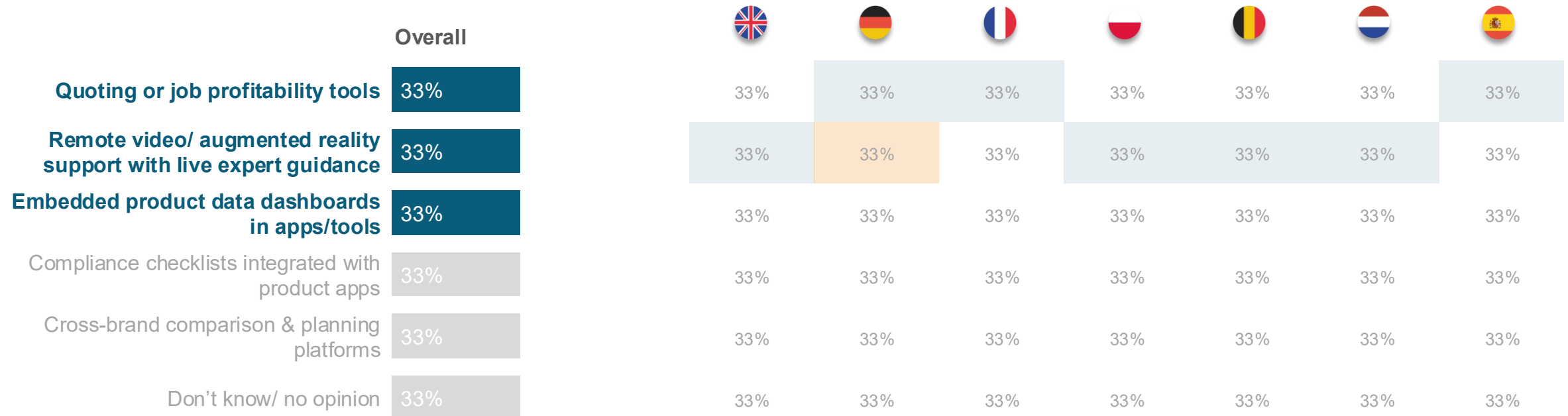
Which of the following manufacturers' support services is the most valuable to you?



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Additional and digital support services

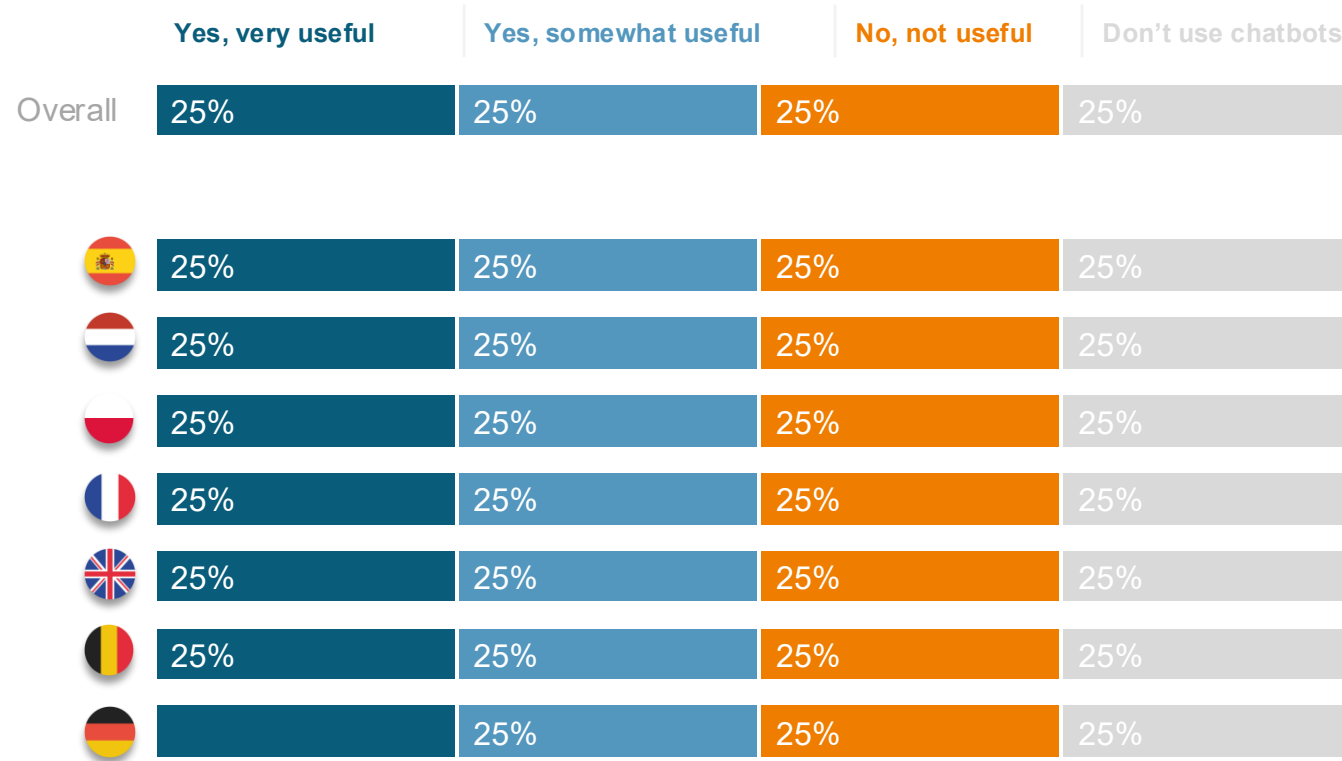
Which of the following additional or future digital support services would be most valuable to you?



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AI chatbots

Do you find the AI chatbots on manufacturers' websites helpful as a support tool in your work?



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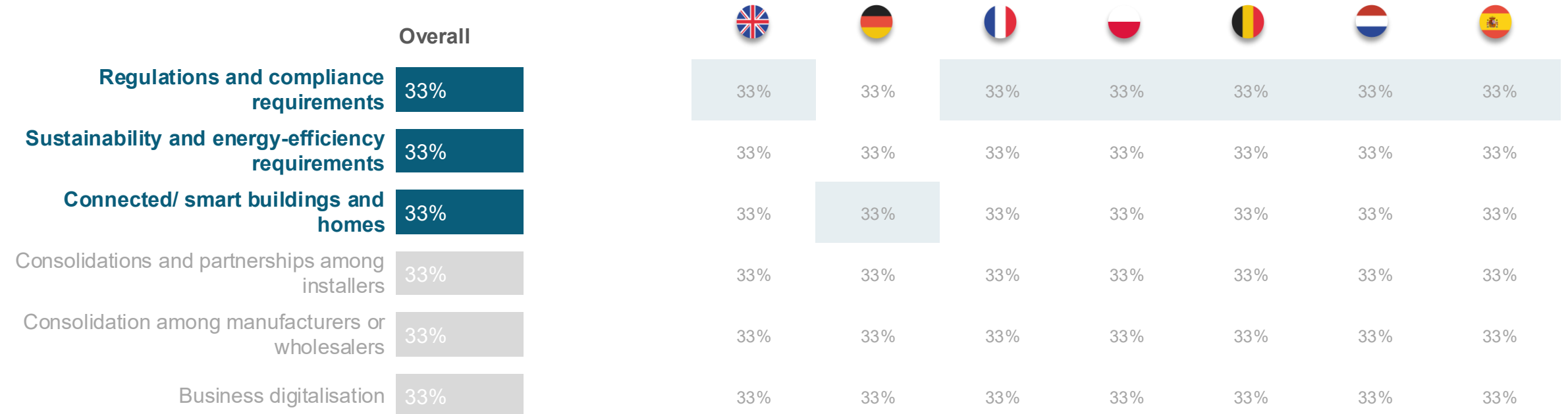
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Daily business influences








Which of the following currently has the biggest influence on your daily business?



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Price quote reactions








We see in many surveys that customers start to consider price more, while products and technologies are also becoming more complex. When you present quotes that are more expensive than before, how do customers usually react nowadays?

	Overall							
Ask for budget revisions or multiple quotes	33%	33%	33%	33%	33%	33%	33%	33%
Negotiate harder on labour	33%	33%	33%	33%	33%	33%	33%	33%
Accept the quote without change	33%	33%	33%	33%	33%	33%	33%	33%
Push for cheaper alternatives	33%	33%	33%	33%	33%	33%	33%	33%
Delay or cancel projects	33%	33%	33%	33%	33%	33%	33%	33%
Buy themselves the products	33%	33%	33%	33%	33%	33%	33%	33%
Other	33%	33%	33%	33%	33%	33%	33%	33%
Don't know	33%	33%	33%	33%	33%	33%	33%	33%

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Low-cost compromises

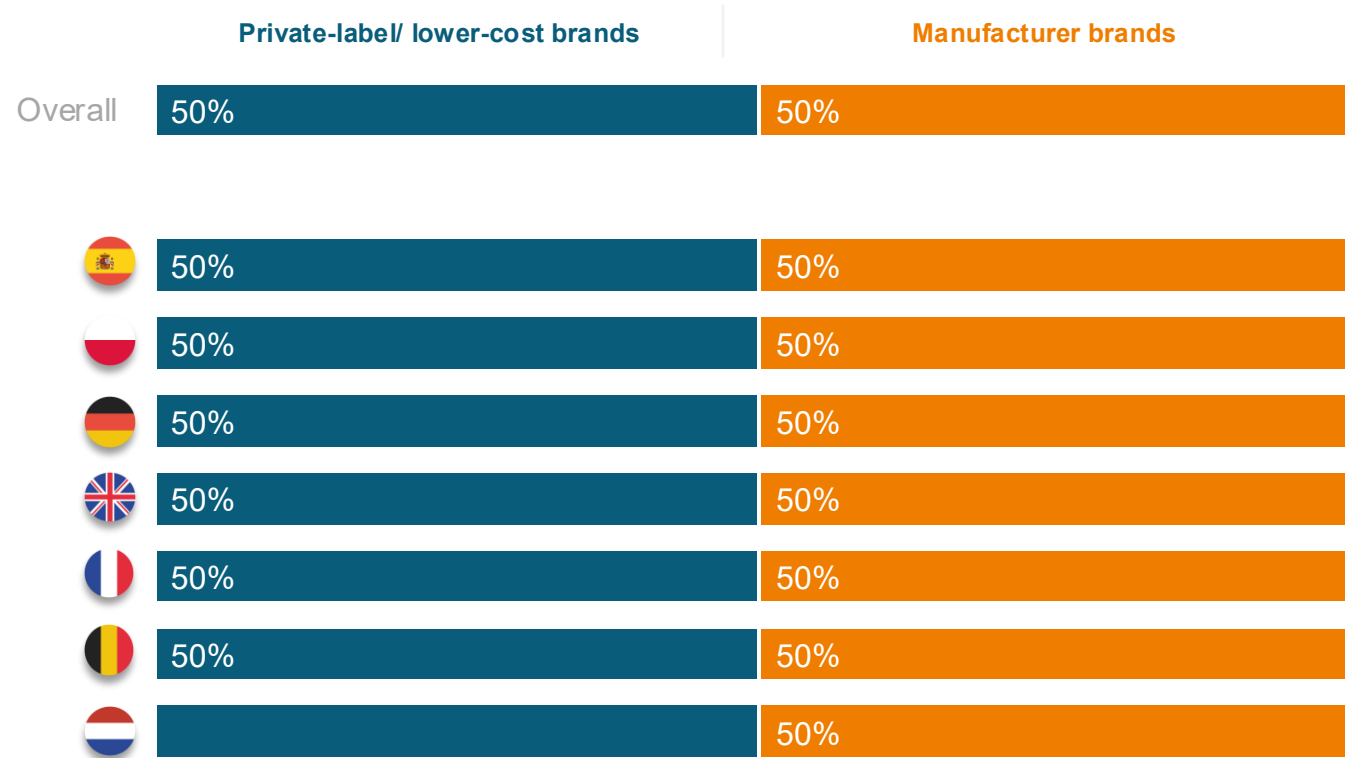
When customers push for the lowest upfront cost, what is most often compromised?

	Overall							
Brand choice	33%	33%	33%	33%	33%	33%	33%	33%
Durability/ product quality	33%	33%	33%	33%	33%	33%	33%	33%
After-sales service or warranty	33%	33%	33%	33%	33%	33%	33%	33%
Smart/ digital features	33%	33%	33%	33%	33%	33%	33%	33%
Energy efficiency	33%	33%	33%	33%	33%	33%	33%	33%
No compromise/ does not occur	33%	33%	33%	33%	33%	33%	33%	33%
Price-only/ discount focus	33%	33%	33%	33%	33%	33%	33%	33%
Labor/ installation effort	33%	33%	33%	33%	33%	33%	33%	33%
Project cancelled/ no agreement	33%	33%	33%	33%	33%	33%	33%	33%

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Private-label/ lower-cost brands share








Roughly what share of the electrical products you install today are private-label or lower-cost brands, rather than manufacturer brands?



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Private-label/ lower-cost brand openness








For which type of products are you more open to private label or lower-cost brands (budget alternatives)?

	Overall							
Basic installation materials like cables and conduits	33%	33%	33%	33%	33%	33%	33%	33%
Lighting products, e.g. luminaires or light sources	33%	33%	33%	33%	33%	33%	33%	33%
Switches and socket outlets	33%	33%	33%	33%	33%	33%	33%	33%
Standard protection components like breakers and fuses	33%	33%	33%	33%	33%	33%	33%	33%
Across most product types when strong cost pressure applies	33%	33%	33%	33%	33%	33%	33%	33%
Power tools	33%	33%	33%	33%	33%	33%	33%	33%
Smart or connected systems	33%	33%	33%	33%	33%	33%	33%	33%
Never, I always choose manufacturers' brands	33%	33%	33%	33%	33%	33%	33%	33%

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Alternative actions

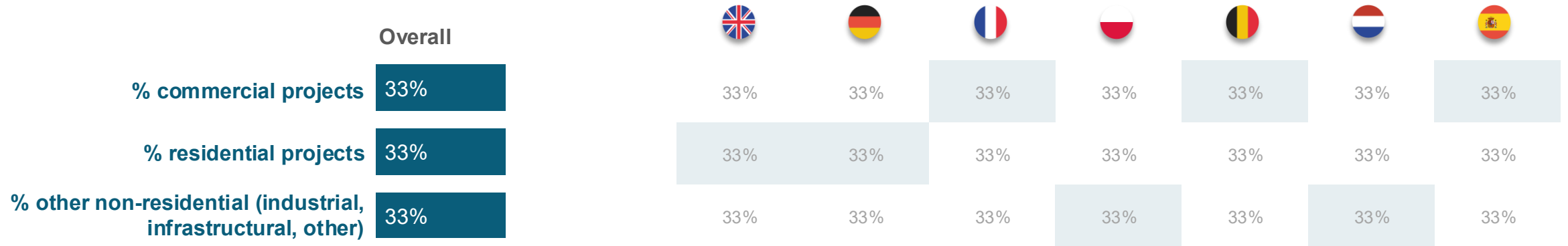
When your preferred / first option for the installation is not available or is significantly more expensive, what do you usually do?

	Overall							
Ask the supplier / wholesaler for a recommended alternative	33%	33%	33%	33%	33%	33%	33%	33%
Order the product but from another supplier or wholesaler	33%	33%	33%	33%	33%	33%	33%	33%
Choose another brand that is available immediately no matter the supplier or wholesaler	33%	33%	33%	33%	33%	33%	33%	33%
Wait until the preferred / first option becomes available	33%	33%	33%	33%	33%	33%	33%	33%
Search on the internet for a suitable alternative	33%	33%	33%	33%	33%	33%	33%	33%
Adapt the installation to use a different type of product	33%	33%	33%	33%	33%	33%	33%	33%

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Connected/ smart systems shares

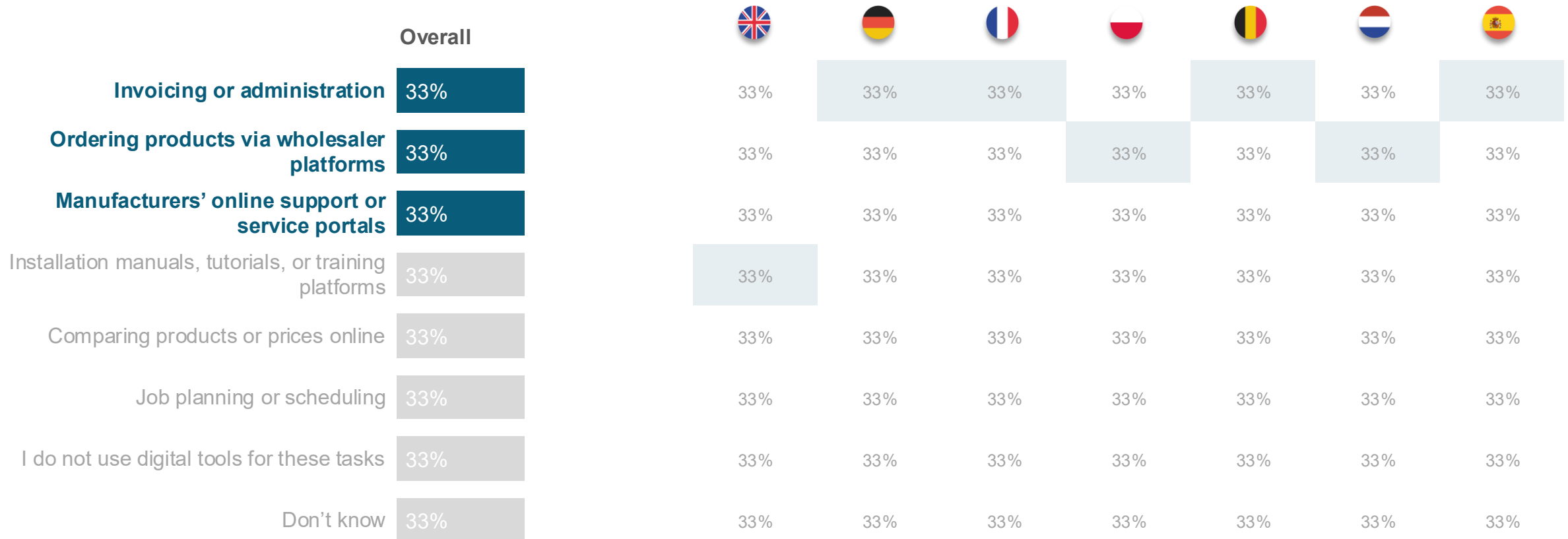
Over the past year, what share of your installation/ retrofit/ maintenance projects included connected/smart systems, products, or components?



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Software, apps, and platforms for specific tasks

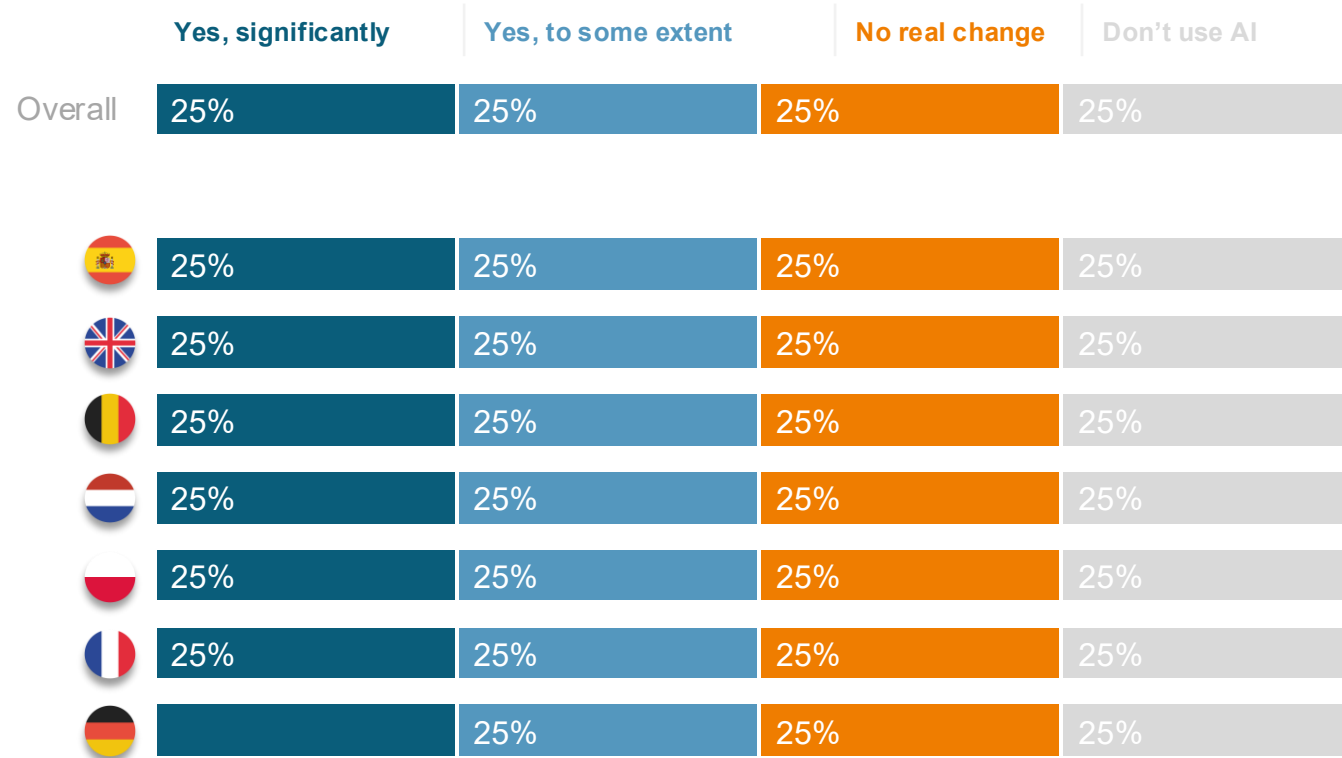
For which of the following tasks do you use dedicated professional software, apps, or online platforms?



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AI usefulness

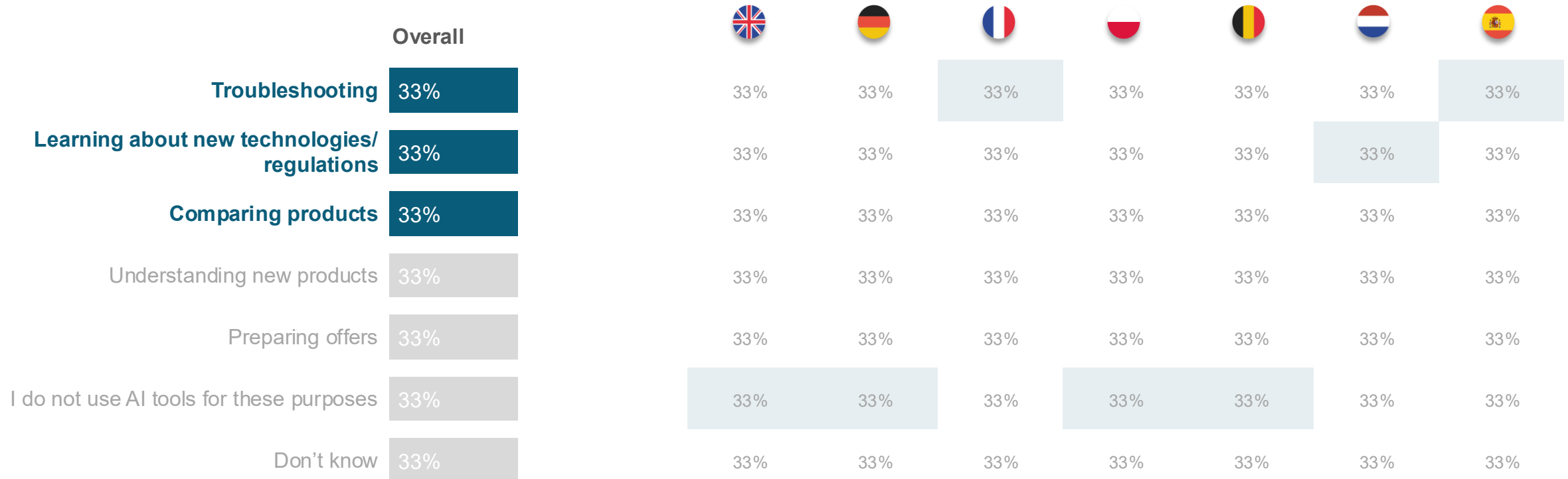
Compared to 1 to 2 years ago, has AI changed the way you find information or make decisions in your work?



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Situational AI use

In which of the following situations do you now use AI tools instead of, or before, other sources?



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Business challenges

What do you see as the biggest challenge for your business in the next 2-3 years?

