



European Mechanical Installation Monitor Q2 2024

Smart buildings and products

July 2024

A product by

USP Marketing Consultancy

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Key takeaways

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Business development

Theme topic – Smart buildings and products

BIM users – European overview

United Kingdom

Germany

France

Poland

Belgium

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About European Mechanical Installation Monitor

THE GOAL

To check and track the behaviour and trends in the European Mechanical installation market. This is done 4 times per year, by means of around 700 phone interviews (per quarter) with registered HVAC installation companies and plumbers, divided over 6 major European markets.

THE RESEARCH TOPICS

Fixed part: Economic developments of the installation companies in Europe (order book and turnover development)

Quarterly theme topics in 2024:

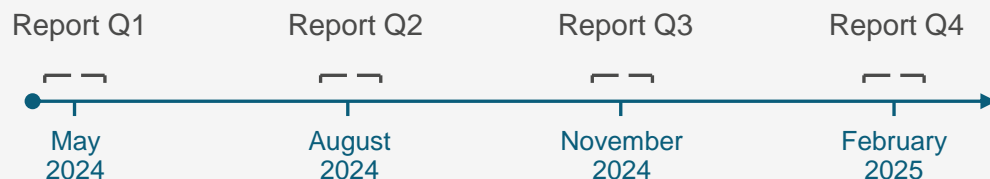
Q1: BIM

Q2: Smart and connected products

Q3: Prefab

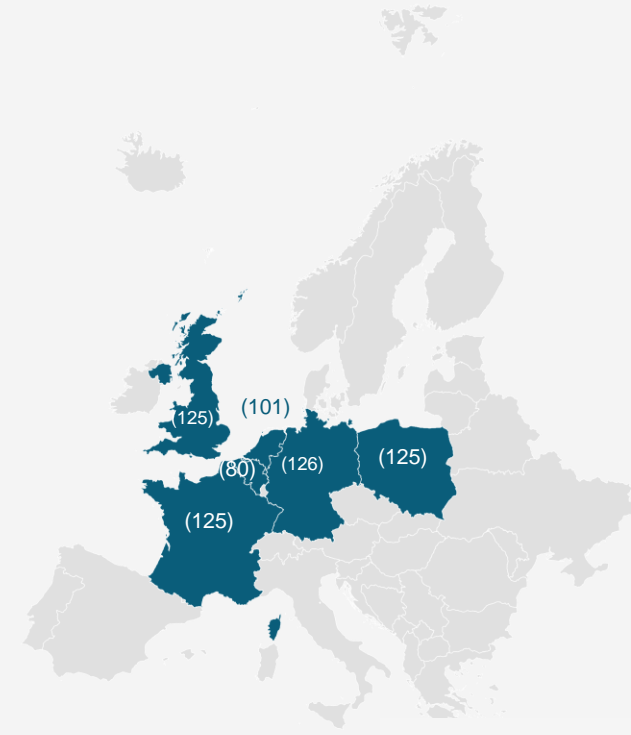
Q4: Media orientation

THE TIMELINE



COUNTRY SCOPE

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

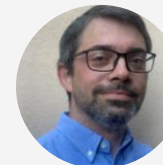


PROJECT TEAM



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About target group & methodology



Surveying HVAC installation companies...

Interviewed companies need to provide HVAC installation services, but they may also do other activities in addition (Electrical installation etc.). Most interviews are conducted with owners/ directors or purchasers of these companies.

... selected from a country-representative database

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

... through phone interviews, by native-speaking agents

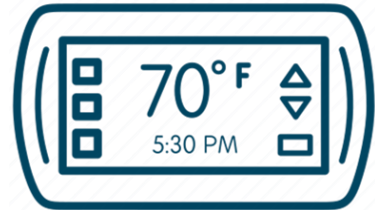
Phone surveys are the best approach for obtaining a sufficient number of interviews, in order to provide insights that can be relied on. These phone interviews are conducted by fixed fieldwork partners, located in the respective countries.

... weighting the results based on company size groups

Country results are weighted so that all three company size groups* have an equal influence on the total. As most interviews are typically conducted with small companies, we believe it is important to correct in order for large companies to have an equal impact on the 'total' results. This way the results are not heavily influenced by many smaller companies.

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

About the Q2 theme topic



Surveying the Smart building topic...

This quarter we investigated the topic of smart building and smart products installations, by asking installers about their involvement with and opinion about smart products and buildings.

Smart products are intelligent - have sensors, are connected to the Internet and are being controlled via apps.

...allows orientation towards a better quality of living and working

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

- Installers' involvement in smart product installation
- Smart products development
- Main features of the smart products
- Main issues when working with smart products
- Working remotely with smart products
- Attitude towards smart tool apps

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Key takeaways



Business Development

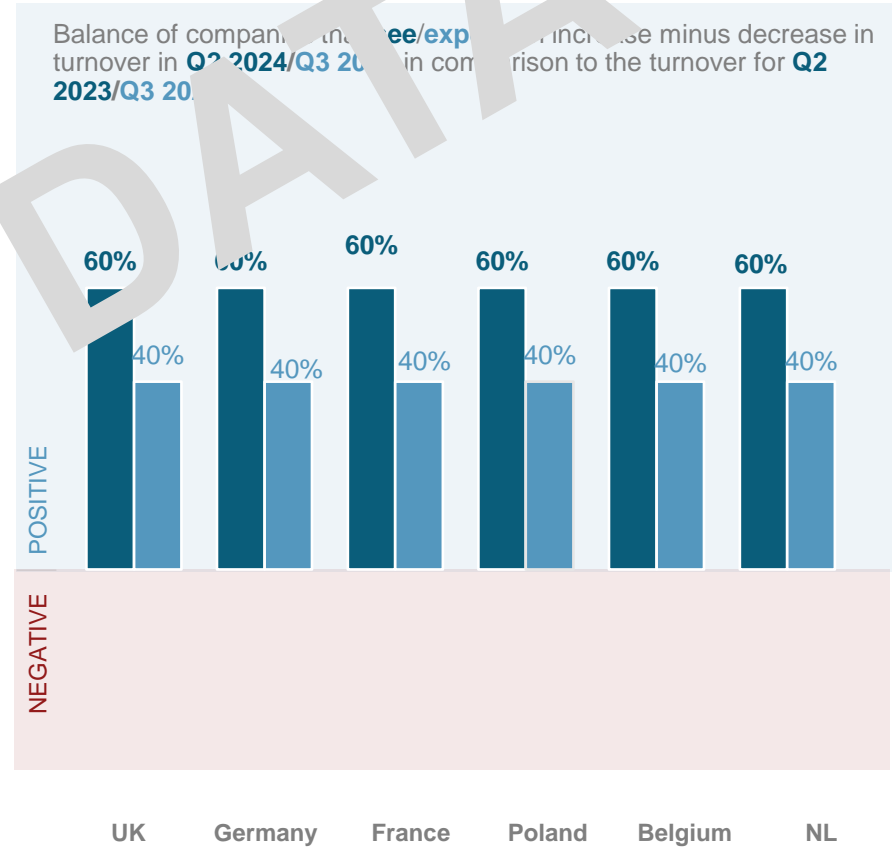
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Turnover balance of installers Q2 2024 and Q3 2024



Key takeaways

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Theme: Smart products and solutions

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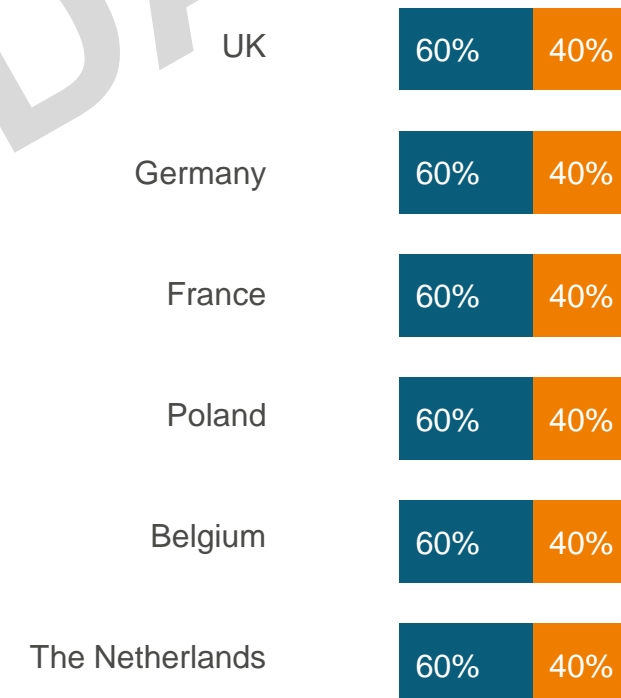
Experience with smart building products installation and working remotely

Q: Is your company involved in the installation of smart products?

Q: Do you already have experience in working from distance with smart products?

% of all companies involved in smart building installations

% of all companies working remotely



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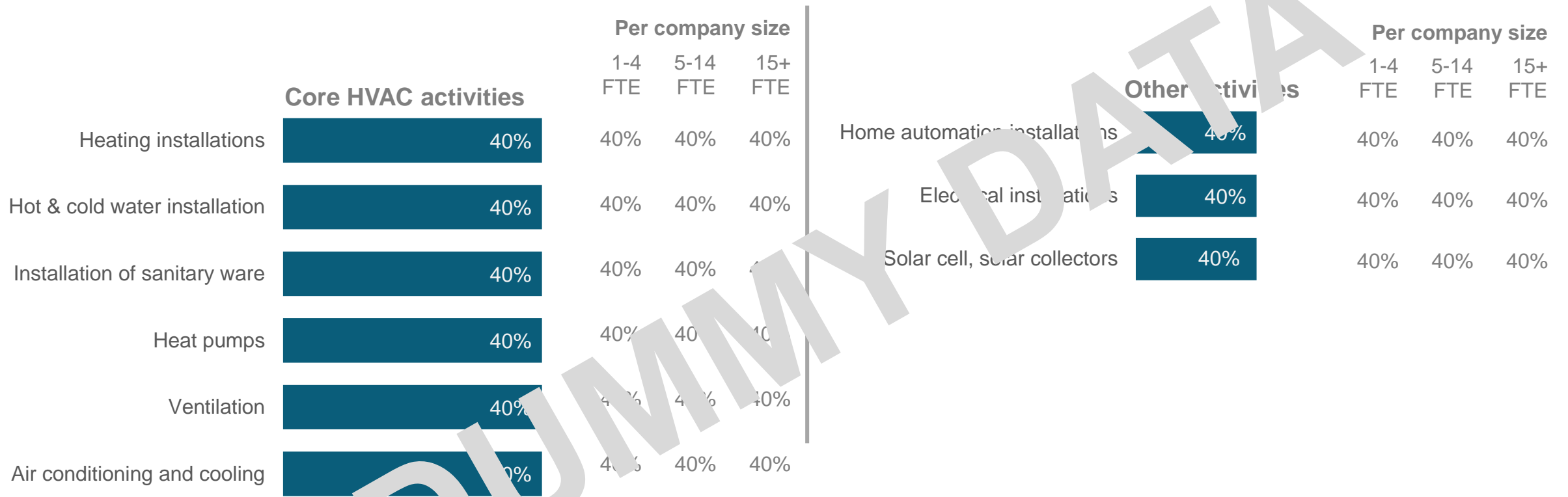
Core HVAC activities

Which of the following installation activities does your company perform?

	UK	Germany	France	Poland	Belgium	Netherlands
<i>Sample size</i>	125	126	125	125	80	101
Heating installations	50%	50%	50%	50%	50%	50%
Hot & cold water installation	50%	50%	50%	50%	50%	50%
Installation of sanitary ware	50%	50%	50%	50%	50%	50%
Hot taps	50%	50%	50%	50%	50%	50%
Ventilation	50%	50%	50%	50%	50%	50%
Air conditioning and cooling	50%	50%	50%	50%	50%	50%

Other installation activities

	UK	Germany	France	Poland	Belgium	Netherlands
<i>Sample size</i>	125	126	125	125	80	101
Solar cell, solar collectors	50%	50%	50%	50%	50%	50%
Electrical installation	50%	50%	50%	50%	50%	50%
Home automation installation	50%	50%	50%	50%	50%	50%



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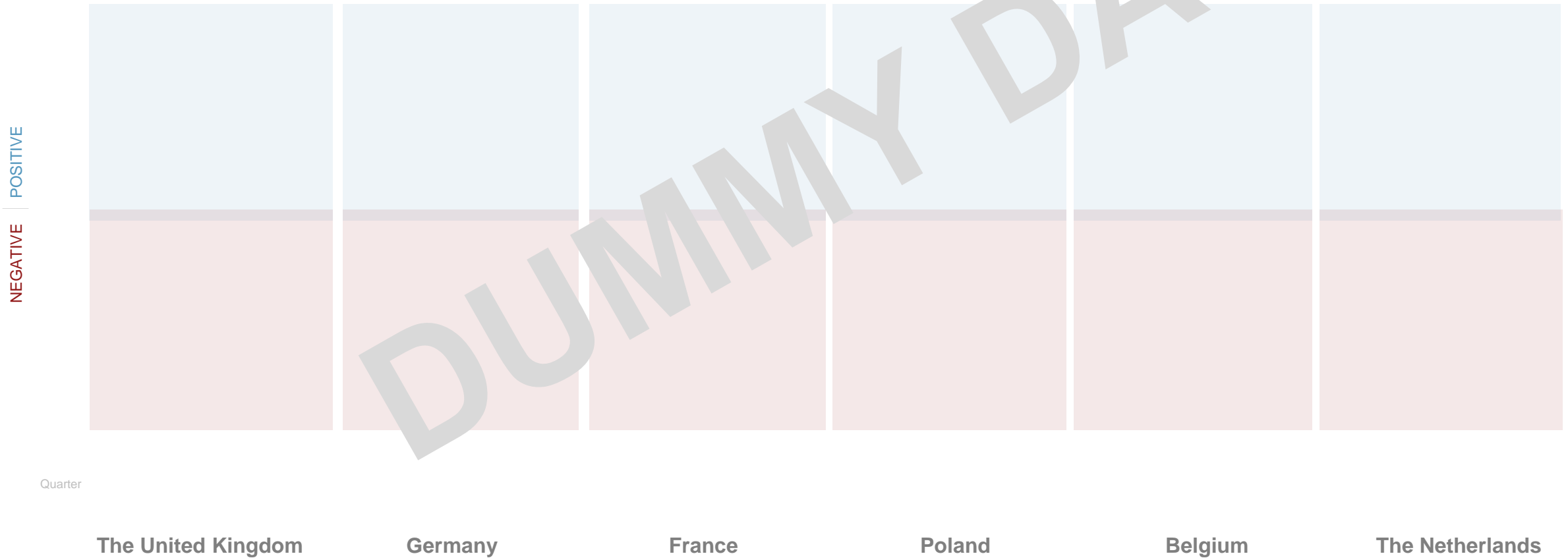
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Turnover outlook last quarters and expectations for Q2 2024

TURNOVER BALANCE

(% INCREASE minus % DECREASE)

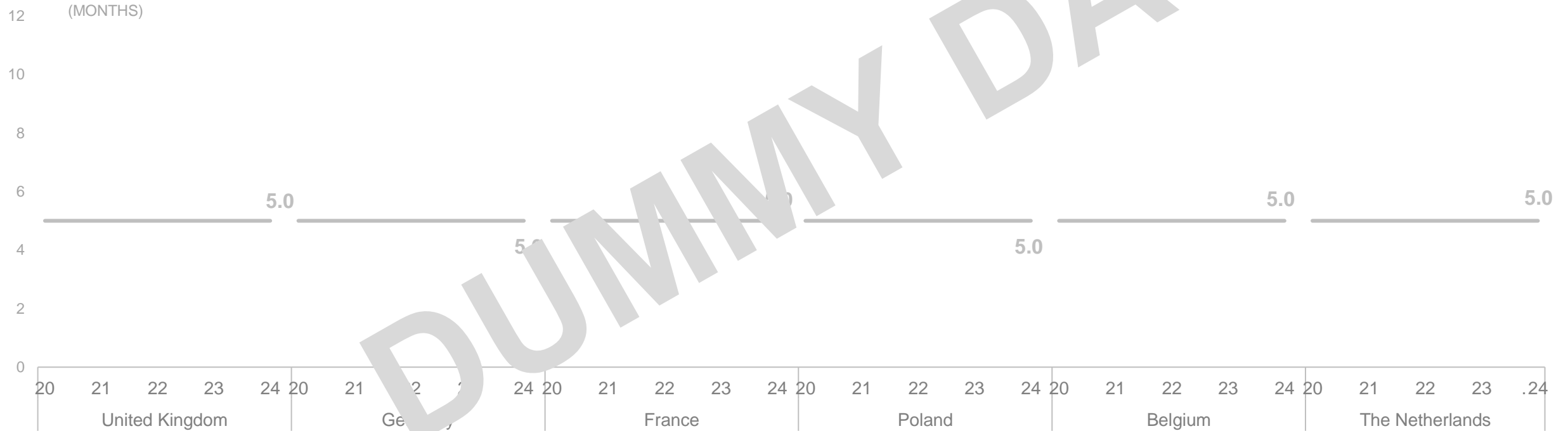
— COMPARISON SAME QUARTER LAST YEAR



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Order book portfolio

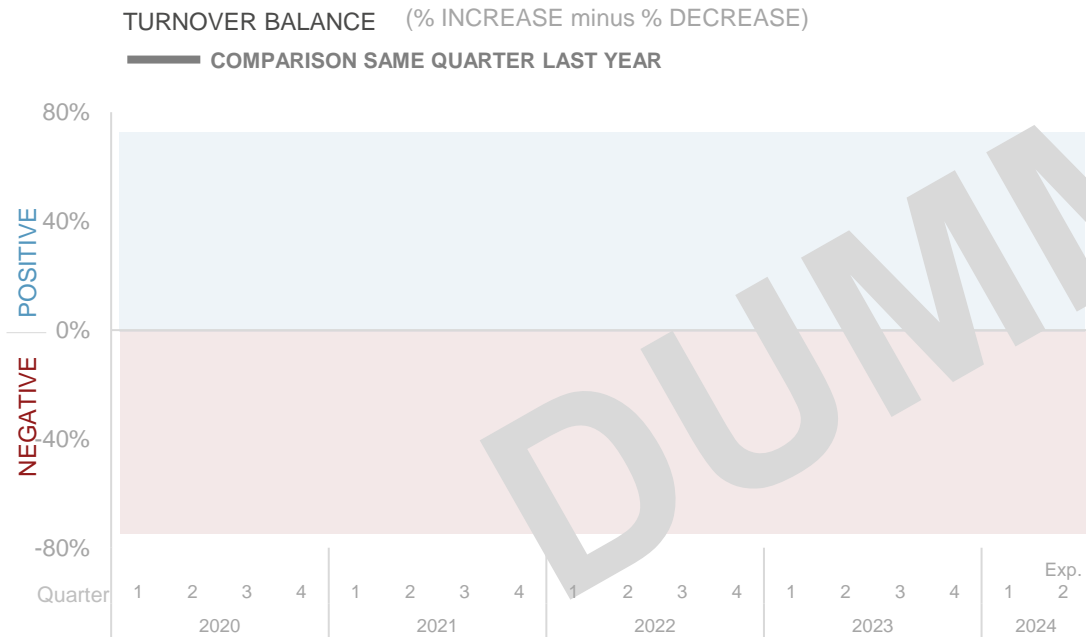
How big is your current order book portfolio? For how many months will you be able to keep your current staff working?



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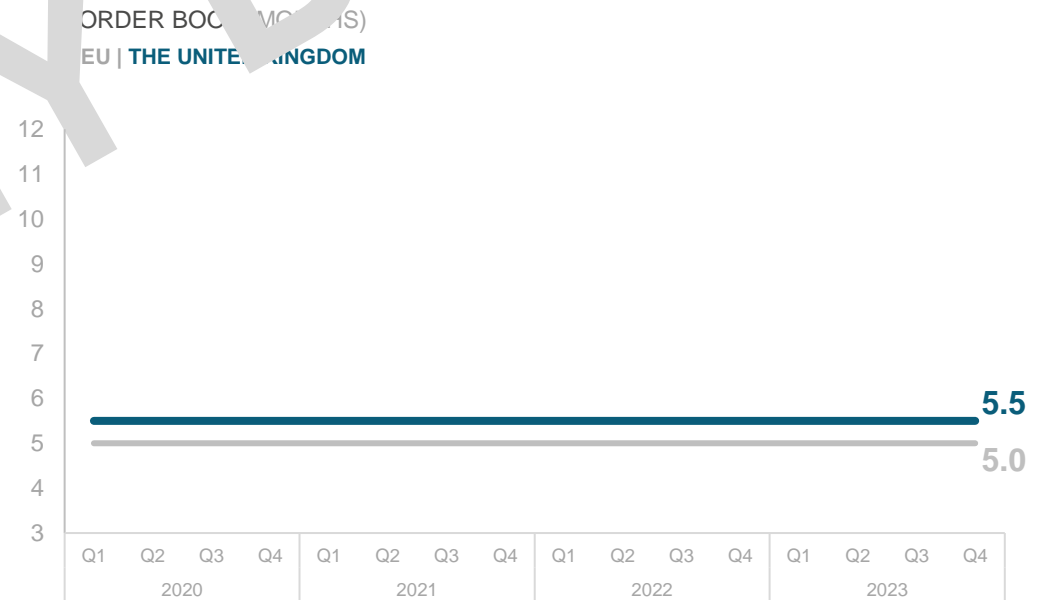
Turnover outlook

If you compare your turnover of Q2-24 to Q2-23, how did your turnover develop?
What are your expectations for the development in Q3-24?



Order book portfolio

How big is your current order book portfolio?



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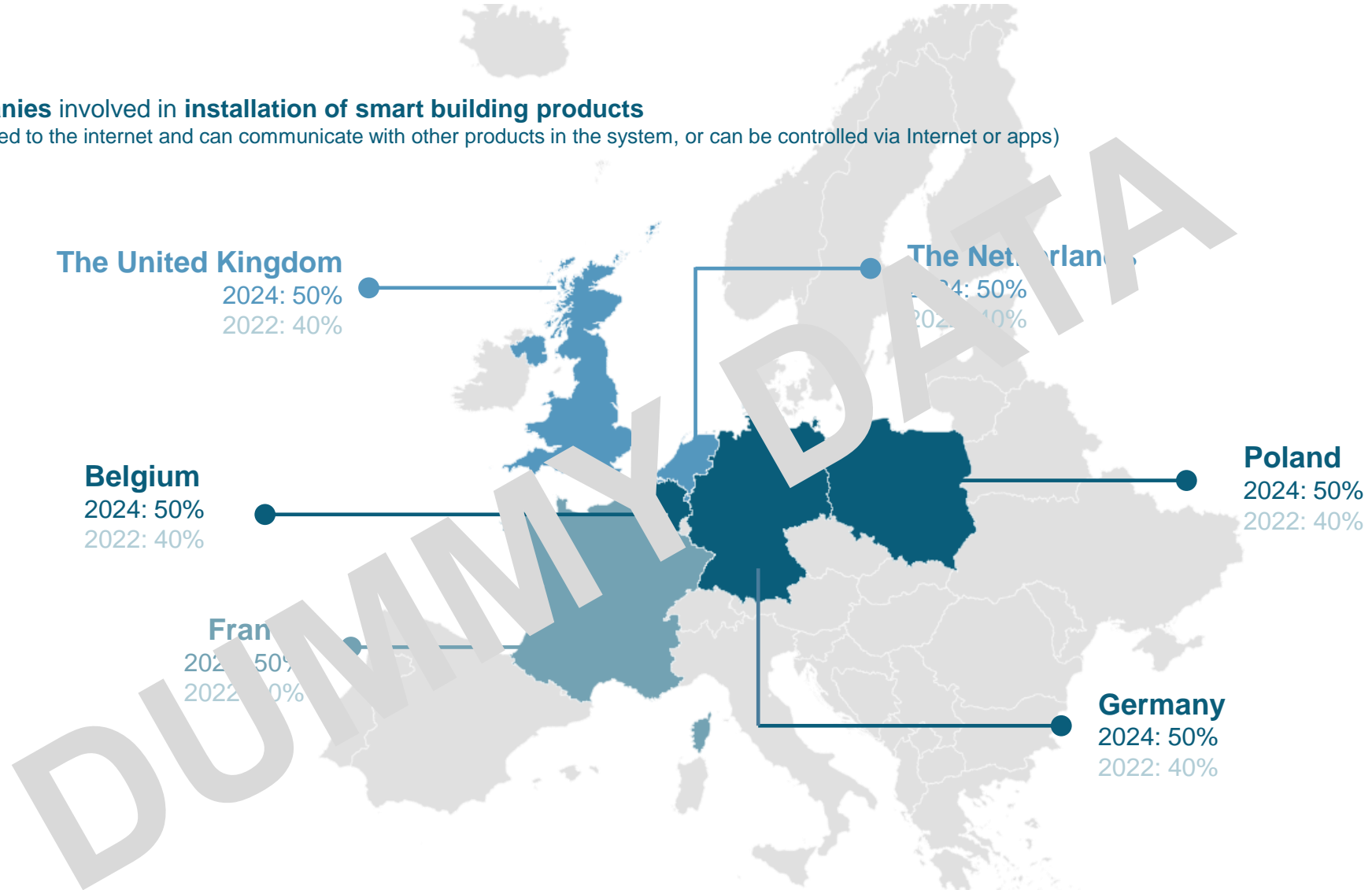
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Average % of companies involved in installation of smart building products

(products that are connected to the internet and can communicate with other products in the system, or can be controlled via Internet or apps)

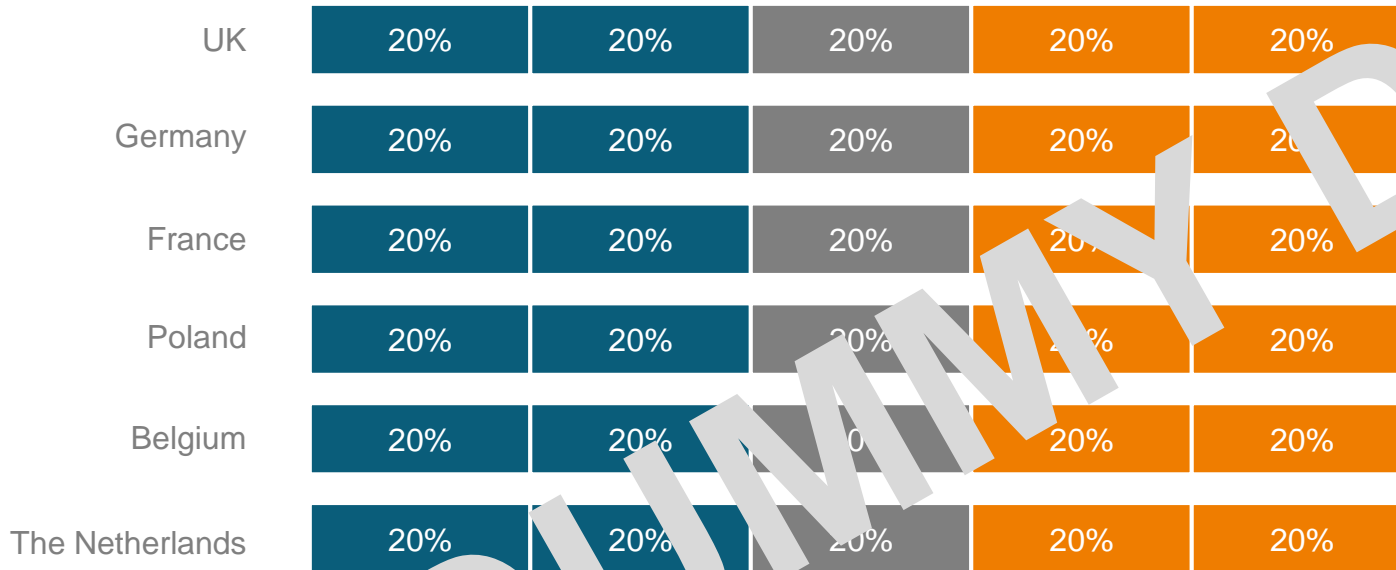


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Smart product development of HVAC installation industry

Q: The HVAC and sanitary industry is developing more and more products that are intelligent - have sensors, are connected to the Internet and are being controlled via apps. How do you feel about that development?

(Very) positive | Neutral | Negative (very) | Don't know

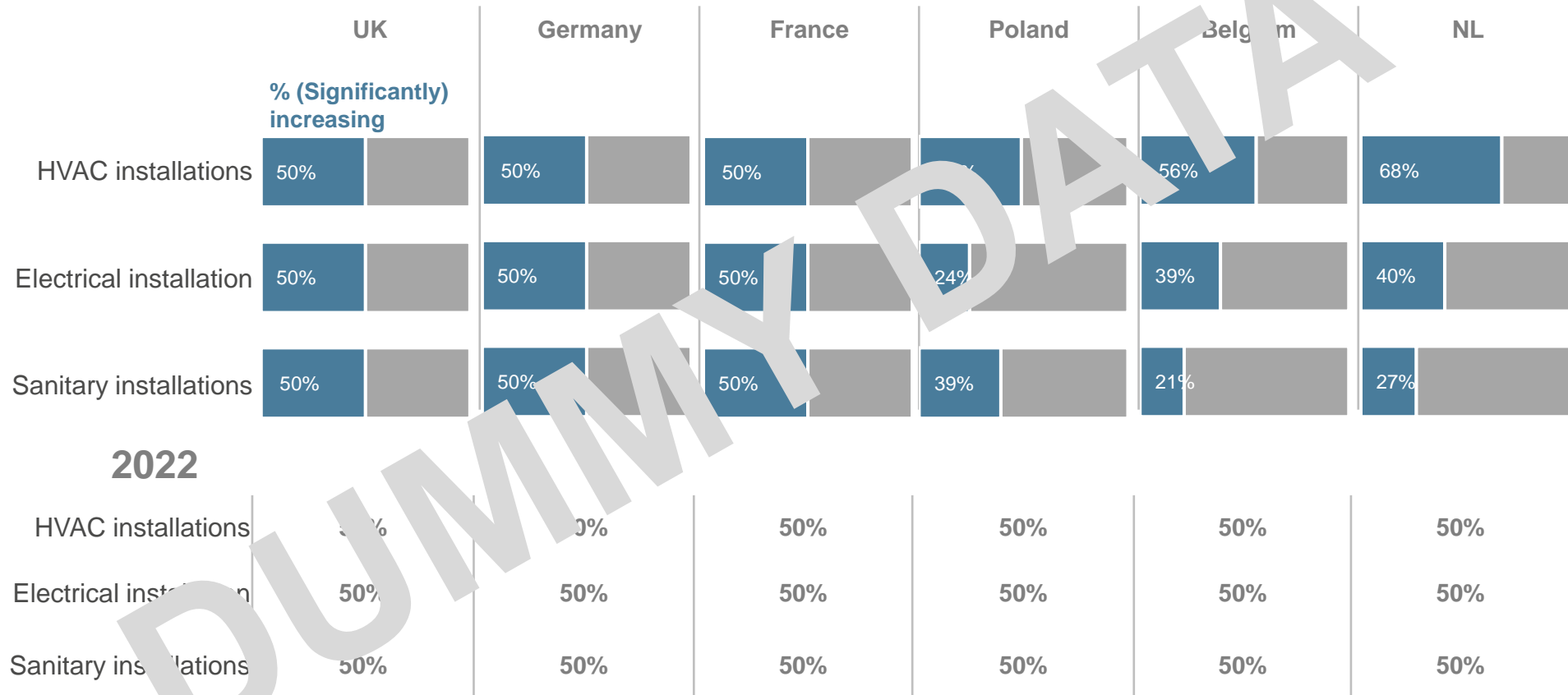


DUMMY DATA

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Request and demand from clients for home automation and smart products

Q: From your experience in the last years what is happening with the request and the demand from clients for home automation and smart products related to the following types of installations?



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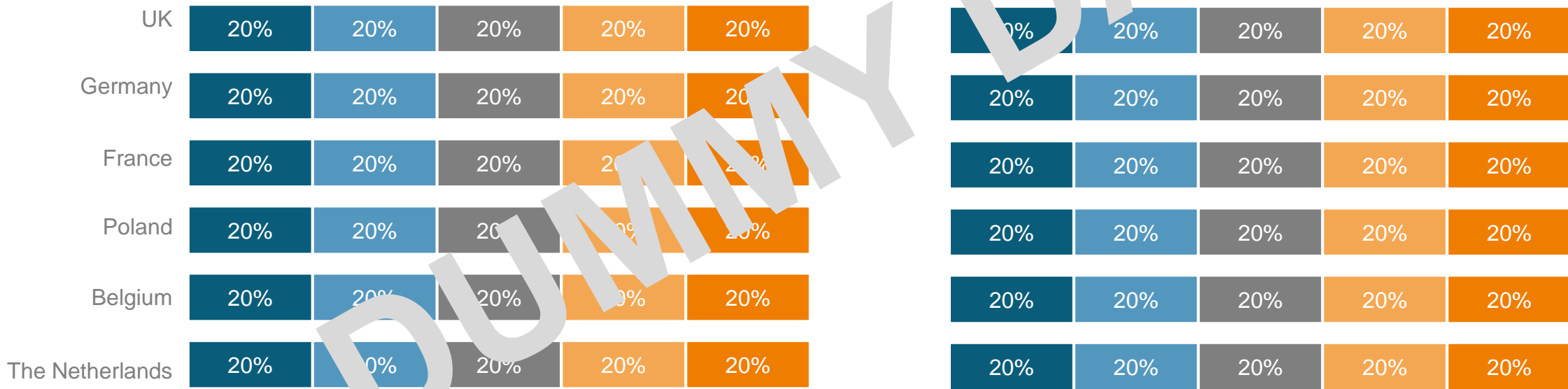
Familiarity with smart home installations

Q: How comfortable are you with following activities? You can answer on a scale of 1 to 5, where 1=Not comfortable at all; 2= Rather uncomfortable; 3=Neutral; 4=Rather comfortable; 5=Very comfortable.

Very comfortable | Rather comfortable | Neutral | Rather uncomfortable | Not comfortable at all | Don't know

Installing home automation systems and products

Connecting and configuring electronic products**



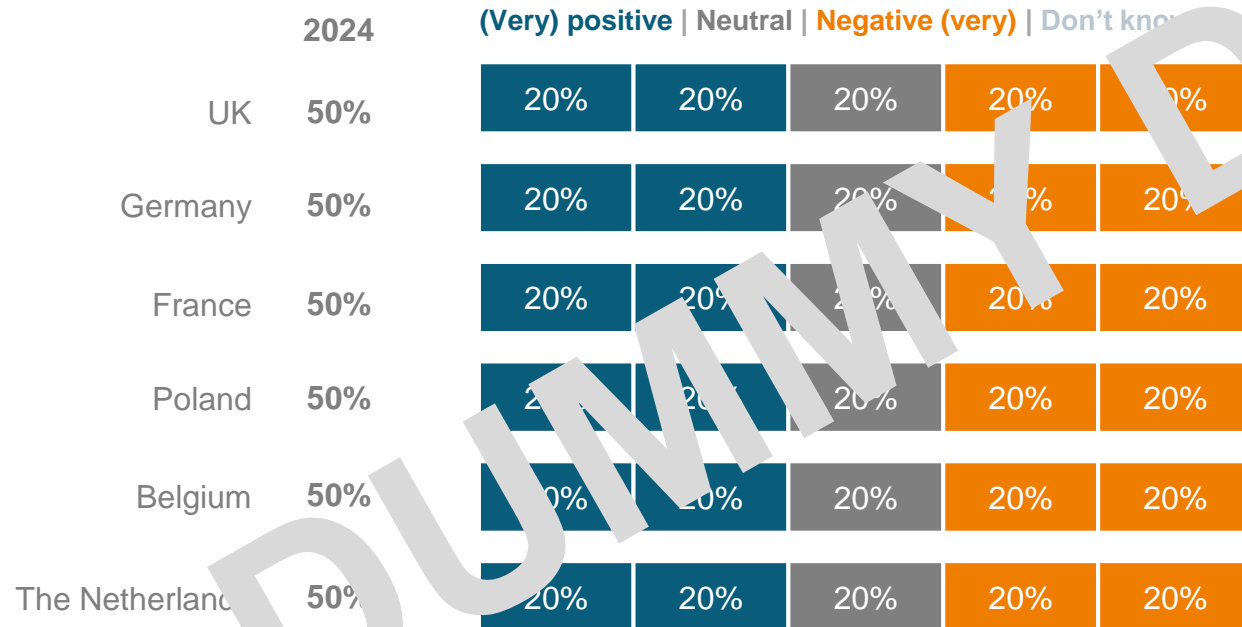
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Working remotely

Q: An idea behind the smart products is that if they are connected to the Internet it will be possible to monitor the performance, diagnose, trouble shoot, maintain, and control them from a distance. Do you already have experience in working from distance with smart products?

Q: What is your experience with working from distance with smart products

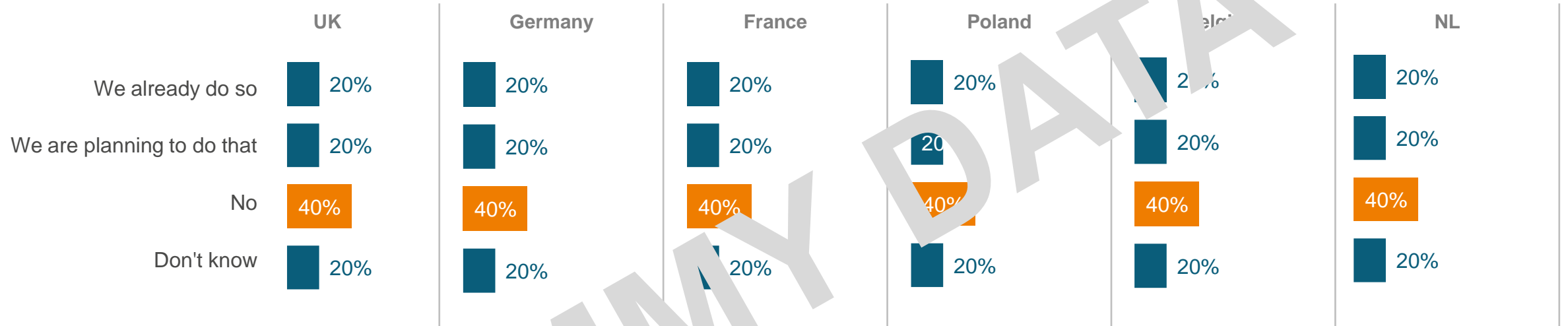
% working remotely (from all installers)



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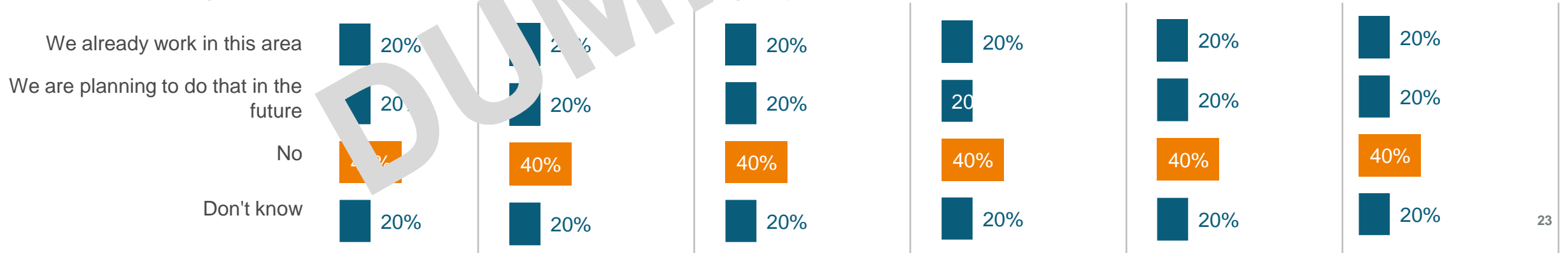
Investing in digital and electronic competencies

Q: Do you see your company hiring more technical profiles in the future, people better trained to deal with digital and electronic products?



Expanding business: monitoring and predictive services

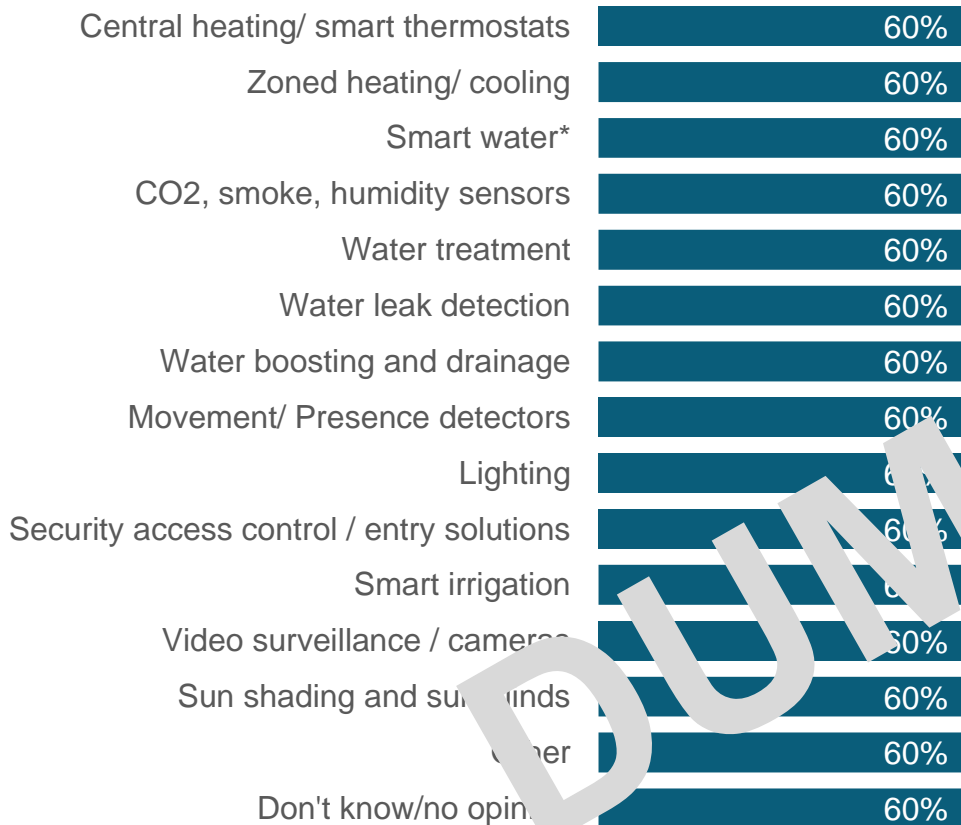
Q: Is data monitoring and predictive business (service) an area you consider entering with your business?



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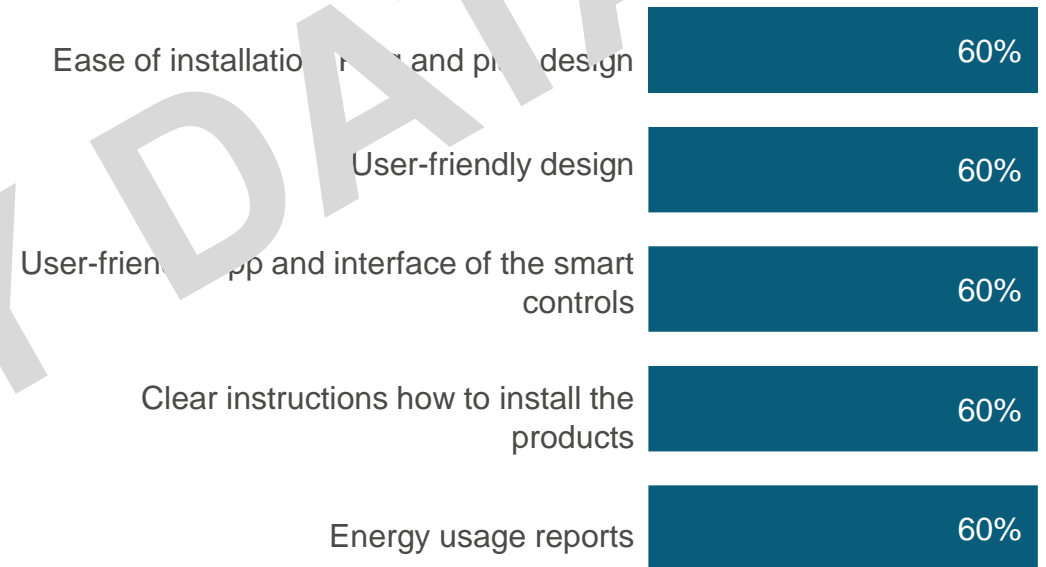
Installed smart building solutions

Q: Which of the following smart building solutions have you installed already?



Most important features of smart products (Top 5)

Q: What are for you the most important features of a smart product?

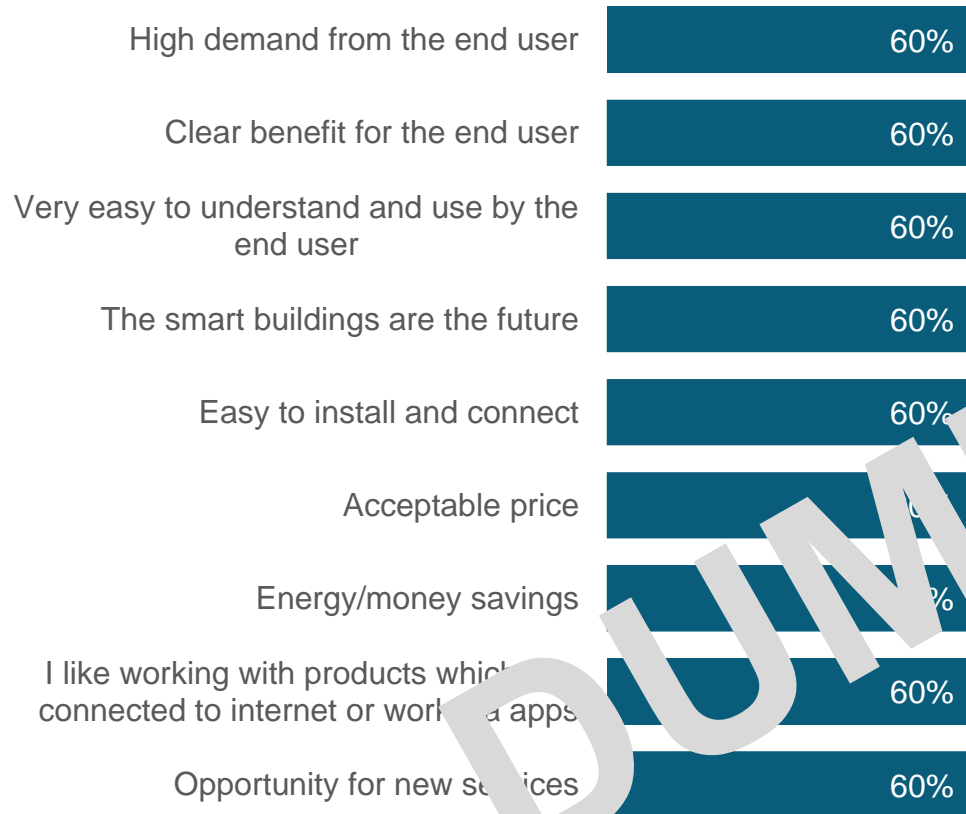


*Smart water includes Water treatment, leak detection and water boosting and drainage (also shown separately)

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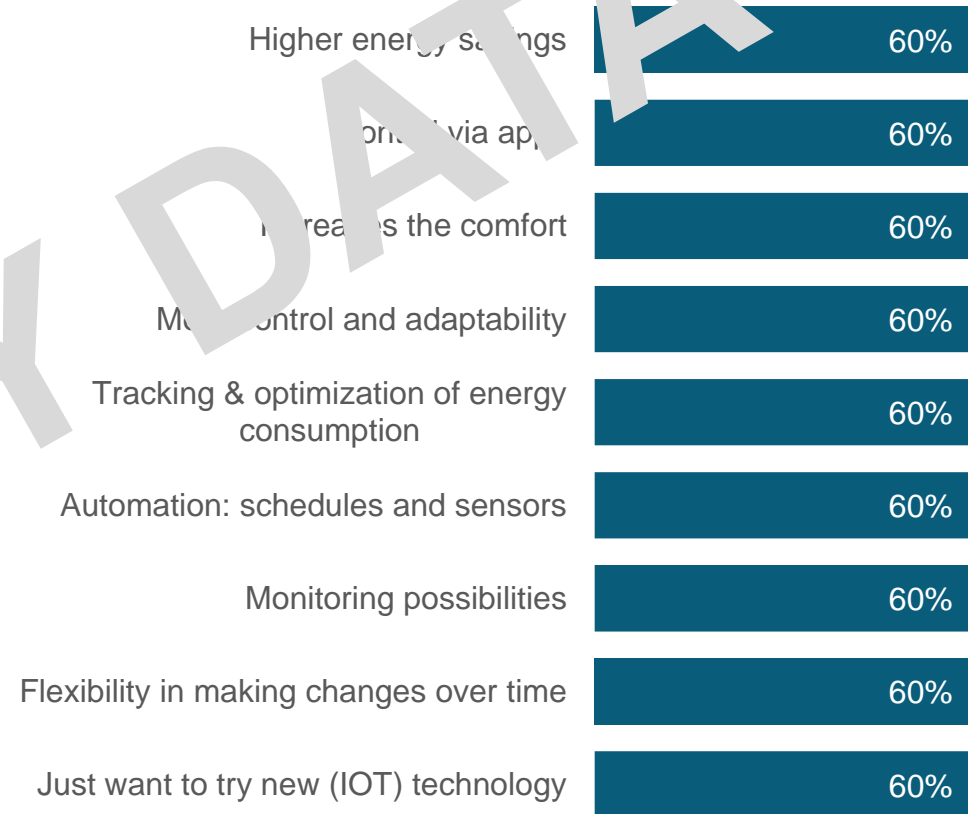
Top reasons to install smart products and solutions

Q: What are the reasons for you to install/ recommend to install smart products and solutions?



End users as drivers

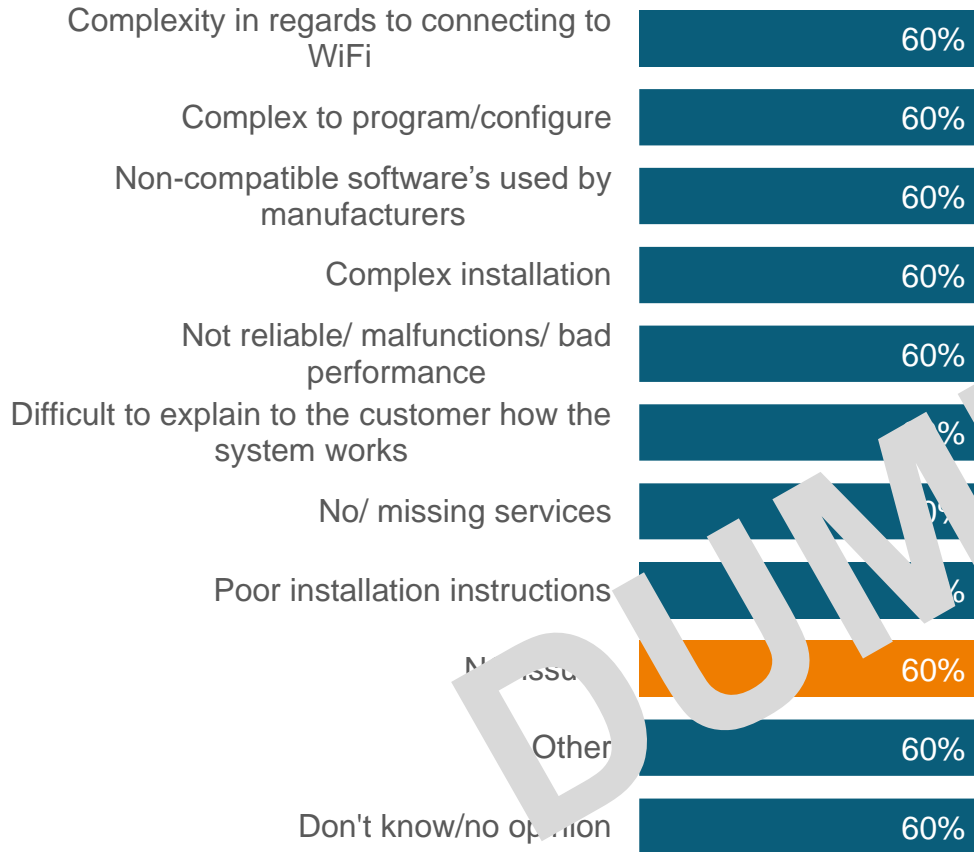
Q: What are the main drivers for your clients when they request smart products and solutions?



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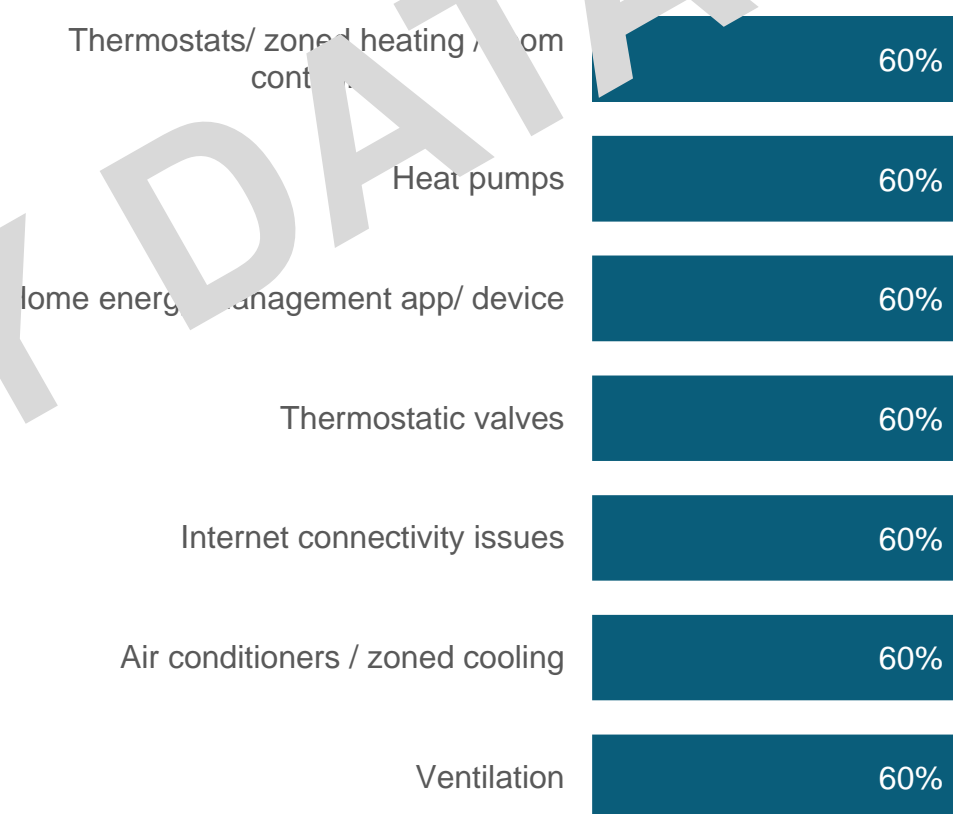
Issues with installing smart products

Q: Have you ever had any issues when installing smart products, and what are the main issues you face?



Products causing problems

Q: Which products in the smart system/ building cause normally the problems you face?

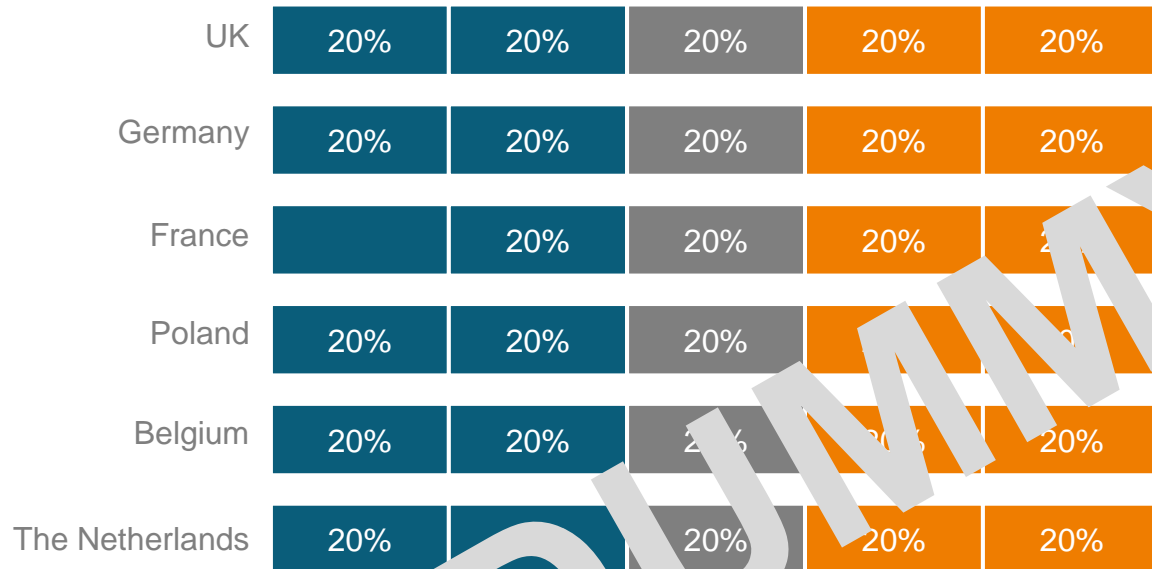


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Interest in tool specific apps

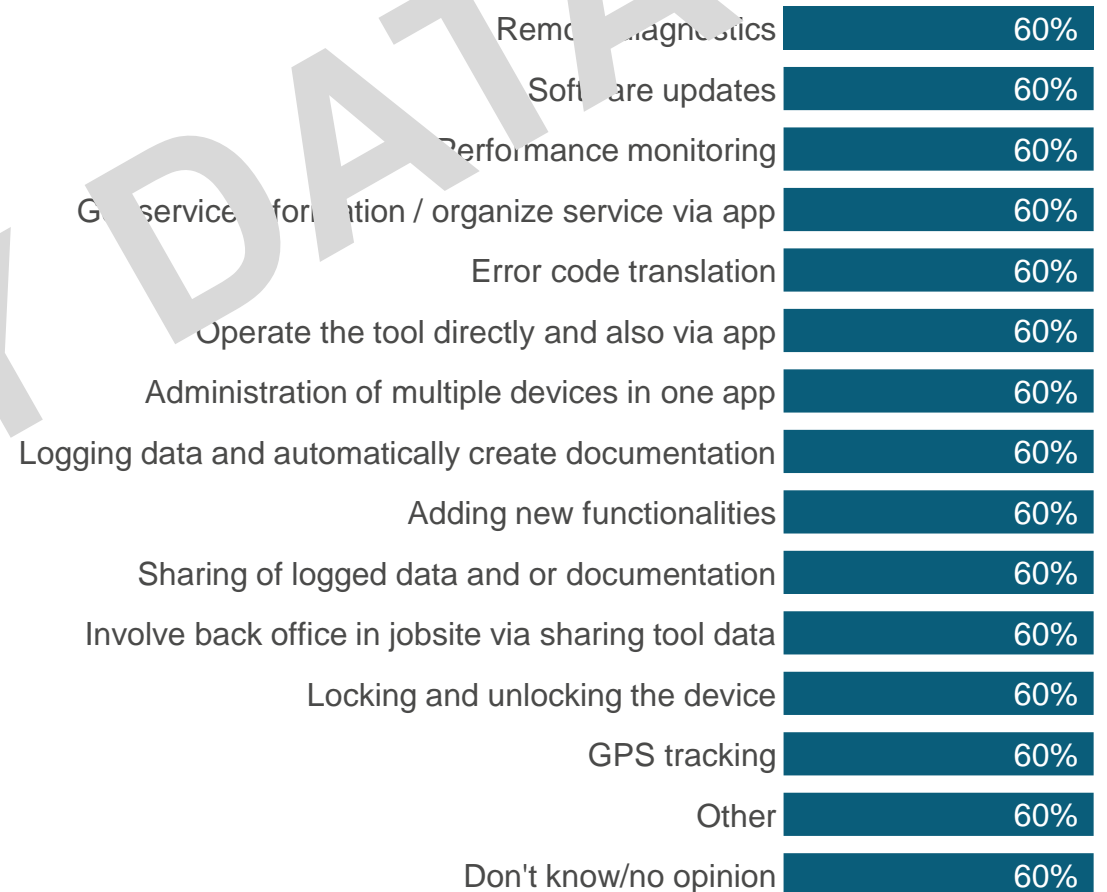
Q: Would you be interested in tool-specific apps for smartphones?

Yes, definitely | Rather yes | Neutral | Rather not | Definitely not | Don't know



Functions to be seen in the tool specific app

Q: Would you be interested in tool-specific apps for smartphones?



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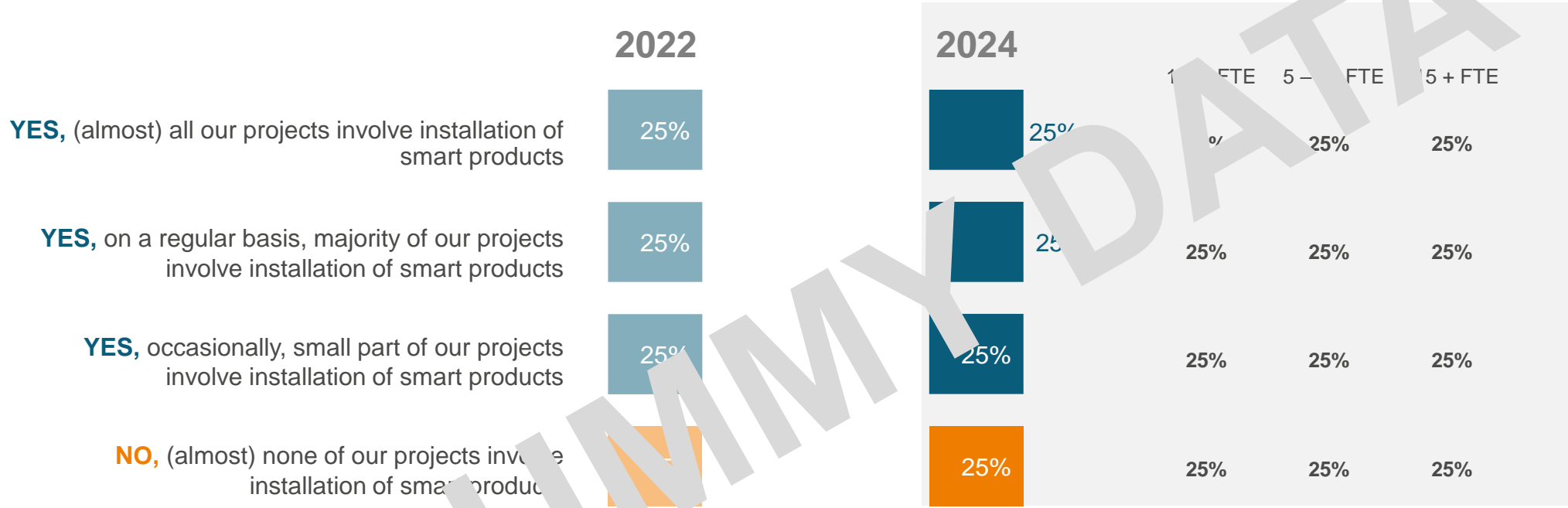
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Smart products installations

Q: Is your company involved in the installation of smart products, which are connected to the Internet and can communicate with other products in the system, or can be controlled via Internet or apps?



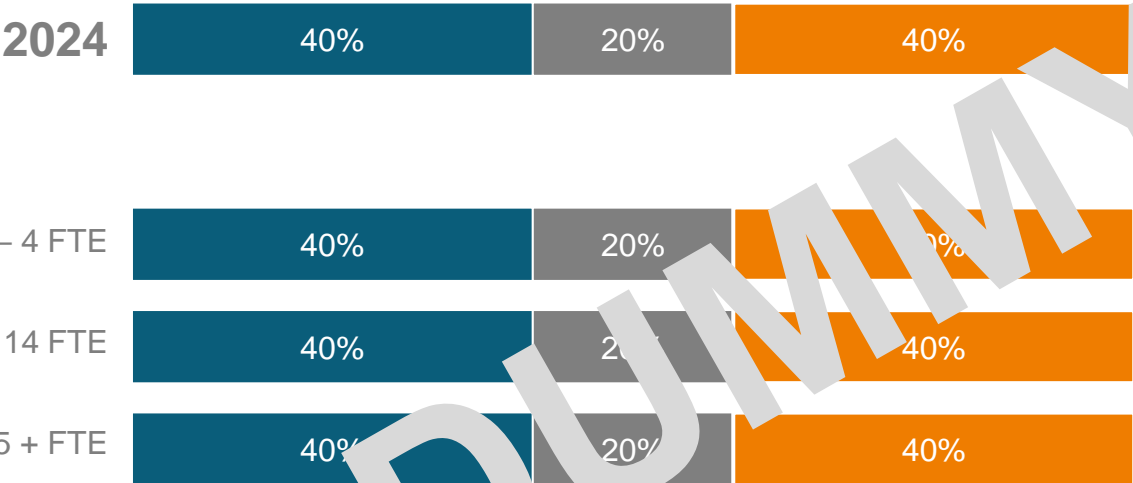
Base: n= 125, all installers; 2022 n=126, all installers

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Smart product development of HVAC and sanitary industry

Q: The HVAC and sanitary industry, is developing more and more products that are intelligent - have sensors, are connected to the internet and are being controlled via apps. How do you feel about that development??

(Very) positive | Neutral | Negative (very) | Don't know



(Very) positive | Neutral | Negative (very) | Don't know



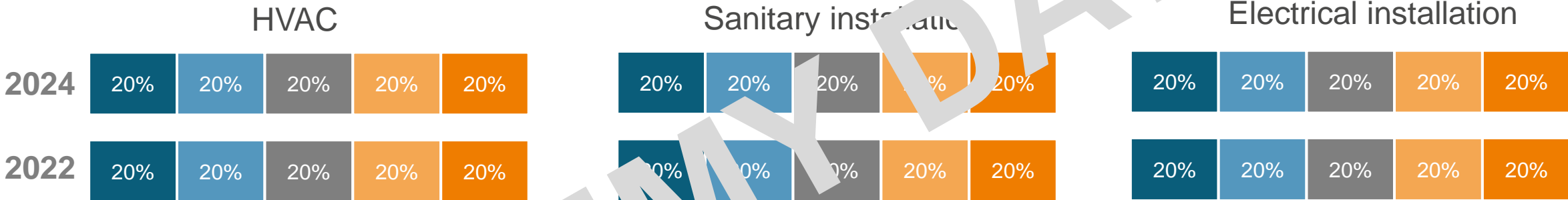
Base: n= 125, all installers; 2022 n=126, all installers

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Request and demand from clients for home automation and smart products

Q: From your experience in the last years what is happening with the request and the demand from clients for home automation and smart products related to the following types of installations?

Significantly increasing | Increasing | Remain the same | Decreasing | Significantly decreasing | Don't know



Base: n= 125, all installers; 2022 n=126, all installers

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Involvement in smart product installation

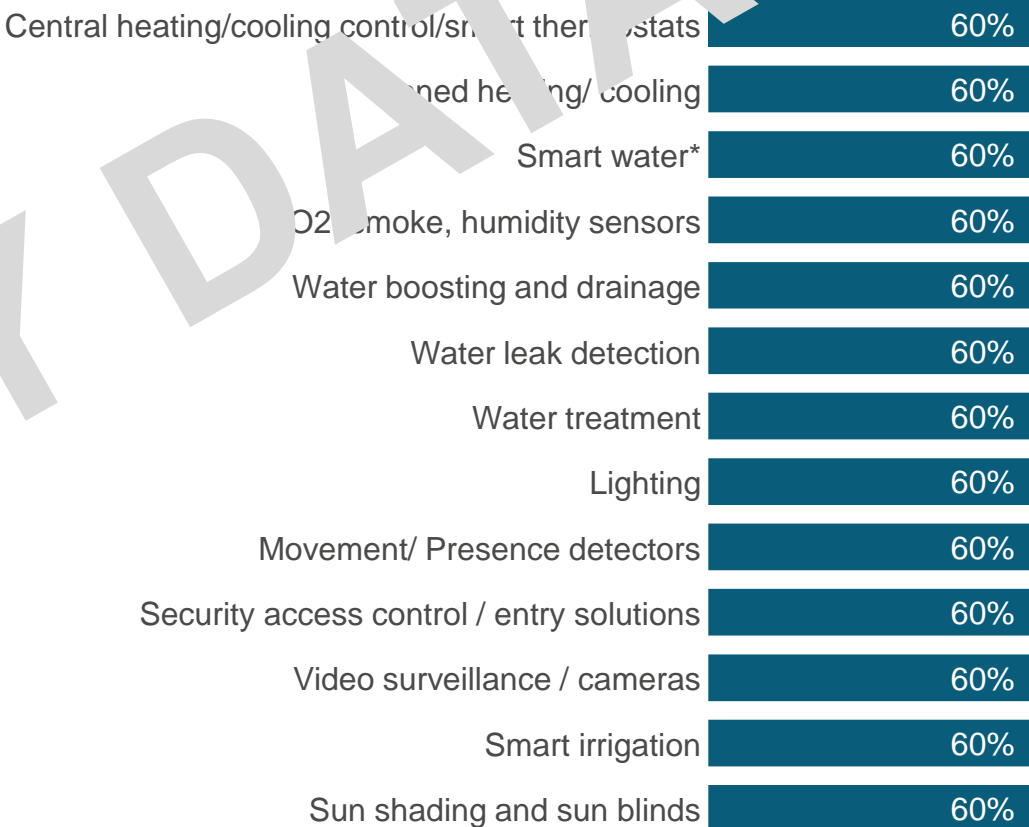
Q: Is your company involved in home automation and installation of smart products?

60% of installers are involved in home automation and the installation of smart products

Base: n= 125, all installers

Installed smart building solutions

Q: Which of the following smart building solutions have you installed already?

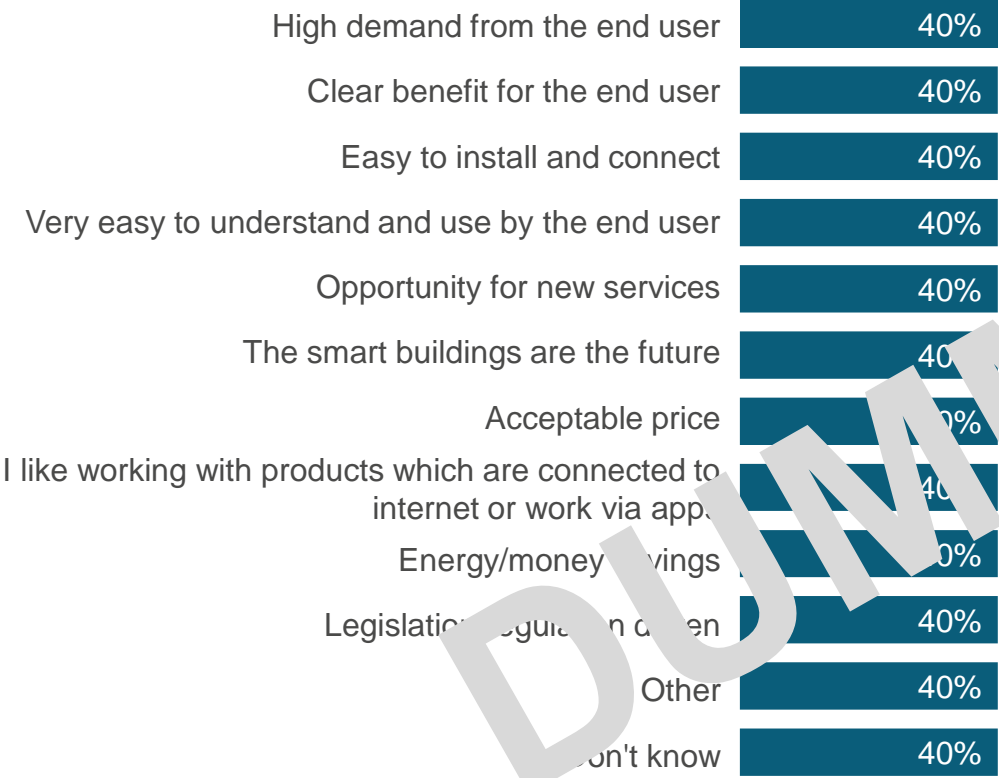


Base: n= 72, if involved in the installation of smart products | *Smart water includes Water treatment, leak detection and water boosting and drainage (also shown separately)

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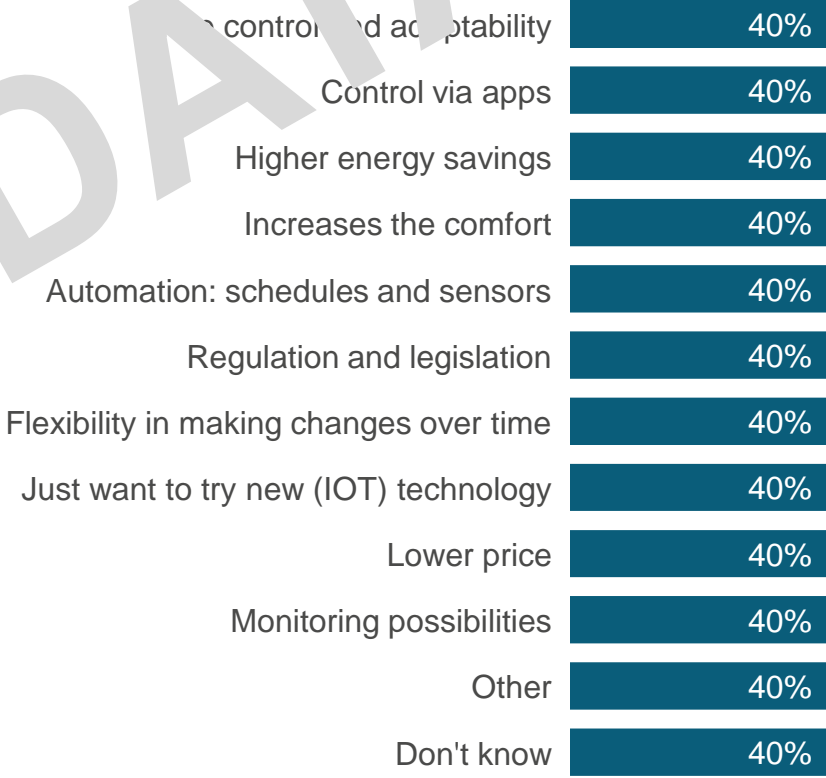
Reasons to install smart products and solutions

Q: What are the reasons for you to install/ recommend to install smart products and solutions?



End users drivers

Q: What are the main drivers for your clients when they request smart products and solutions?

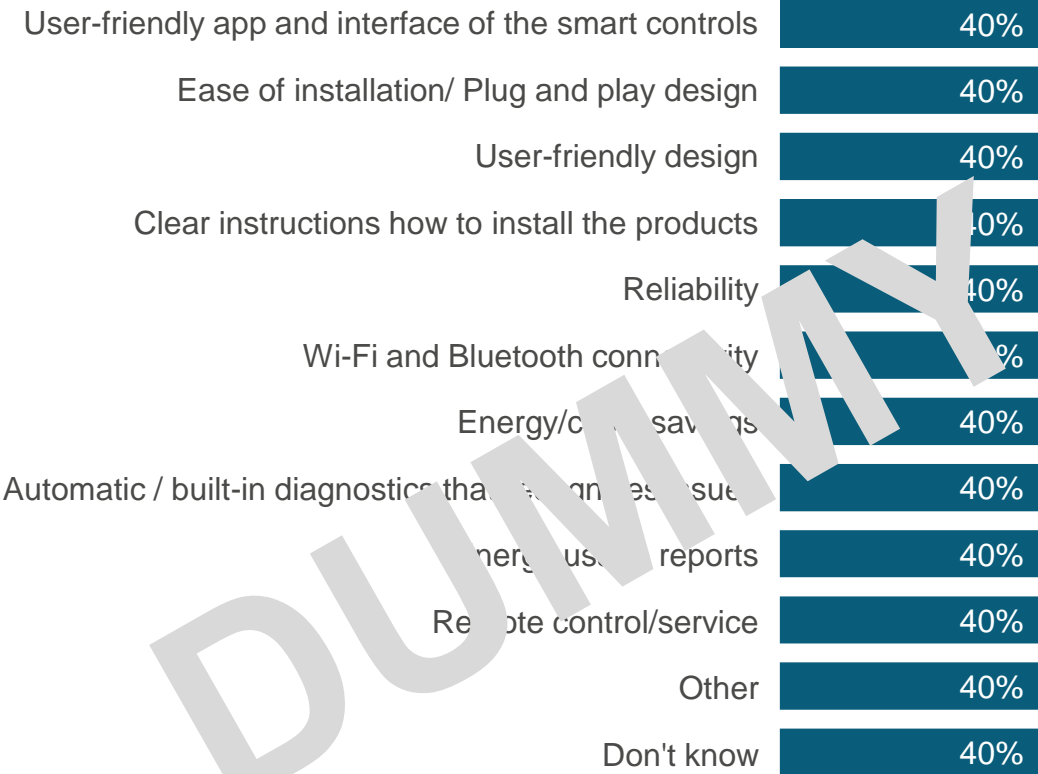


Base: n= 73, if involved in the installation of smart products

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Most important features of smart products

Q: What are for you the most important features of a smart product?



Base: n= 125, all installers

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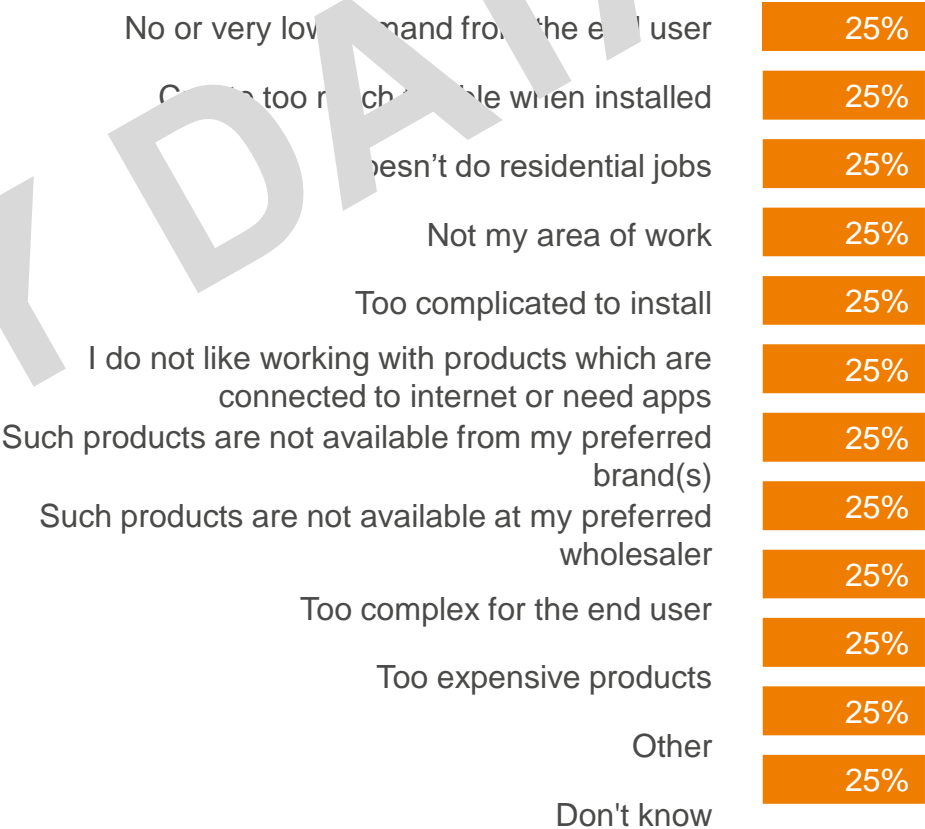
Involvement in smart product installation

Q: Is your company involved in home automation and installation of smart products?

60% of installers are not involved in home automation and the installation of smart products

Main reasons not to work with home automation and install smart products*

Q: What are the main reasons not to work with smart products?

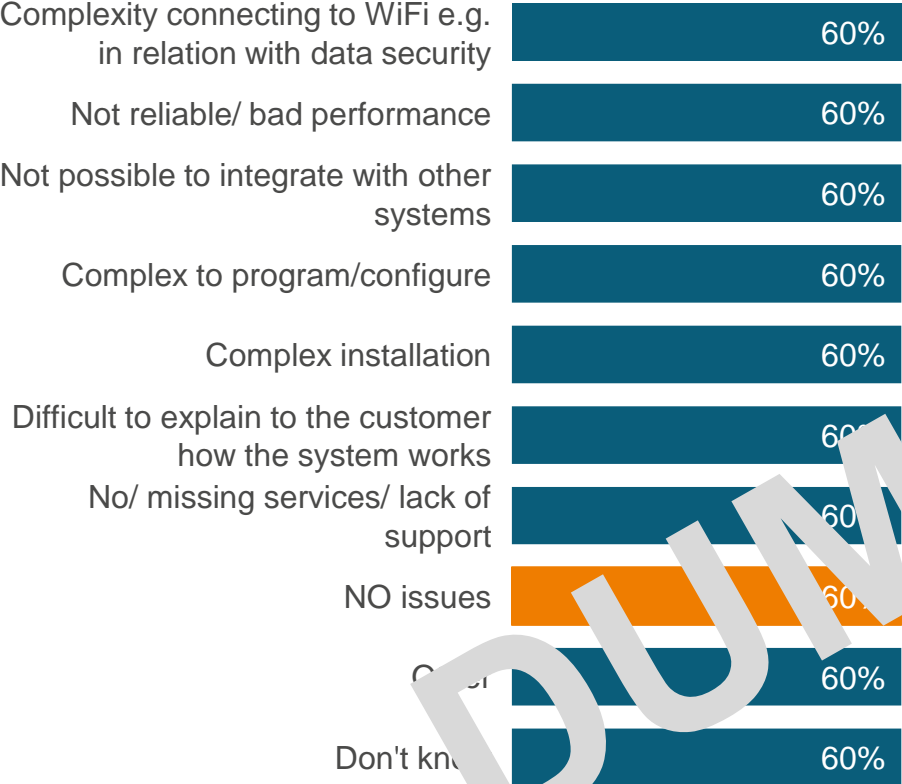


Base: n= 53, if not involved in the installation of smart products
* Because of the small n, results are only informative and not conclusive

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Issues with installing smart products

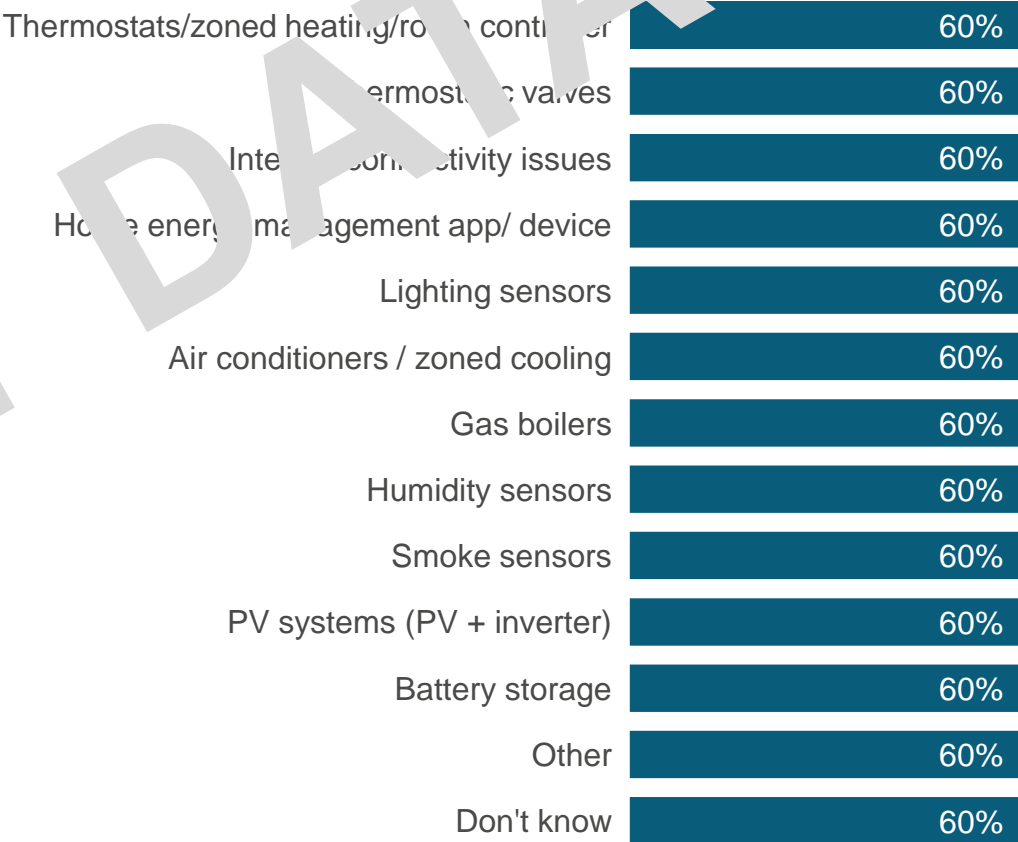
Q: Have you ever had any issues when installing smart products, and what are the main issues you face?



Base: n= 72, if involved in the installation of smart products

Products causing problems

Q: Which products in the smart s... / building cause normally the problems you face?



Base: n= 42, if have had issues with installations

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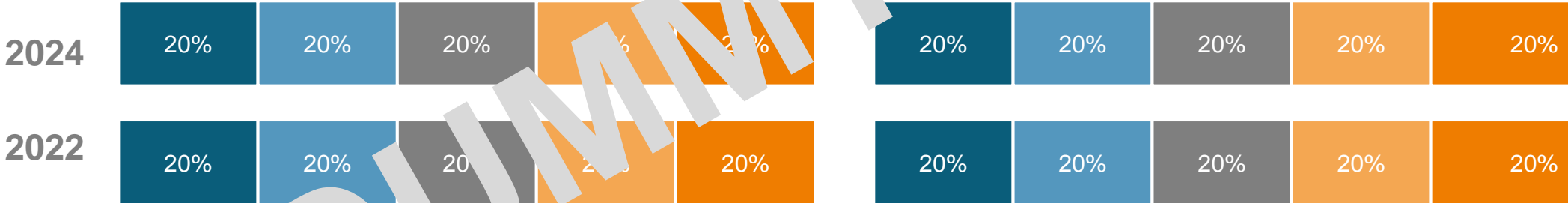
Familiarity with smart home installations

Q: How comfortable are you with following activities? You can answer on a scale of 1 to 5, where 1=Not comfortable at all; 2=Rather uncomfortable; 3=Neutral; 4=Rather comfortable; 5=Very comfortable.

Very comfortable | Rather comfortable | Neutral | Rather uncomfortable | Not comfortable at all | Don't know

Installing home automation systems and products*

Connecting and configuring electronic products**



2024: *Base: n= 73, if involved in the installation of smart products
**Base: n= 125, all installers

2022: *Base: n= 97, if involved in the installation of smart products
**Base: n= 126, all installers

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60% of installers who work with smart products* have experience working remotely

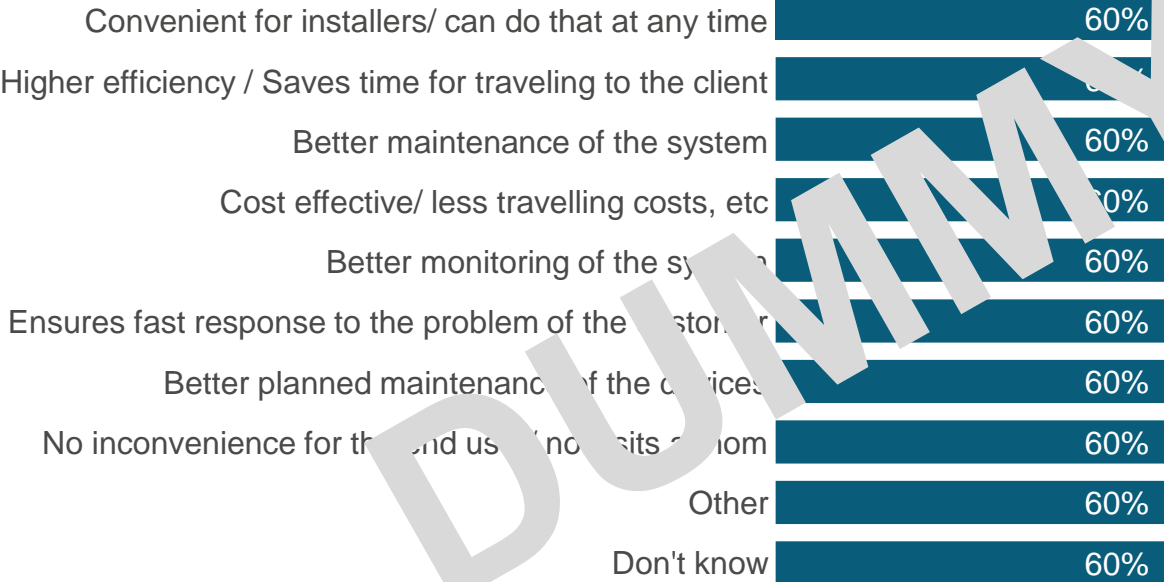
Experience with working with smart products remotely**

Q: What is your experience with working from distance with smart products?

Very positive | Positive | Neutral | Negative | Very negative | Don't know



REASONS FOR POSITIVE EXPERIENCE



REASONS FOR NEGATIVE EXPERIENCE

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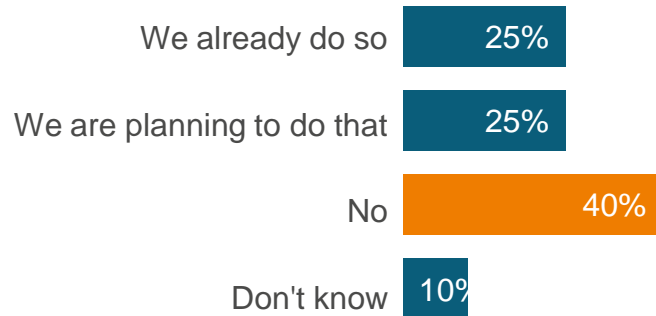
*Base: n=72, if involved in the installation of smart products

** Base: n=38, with experience with working from distance

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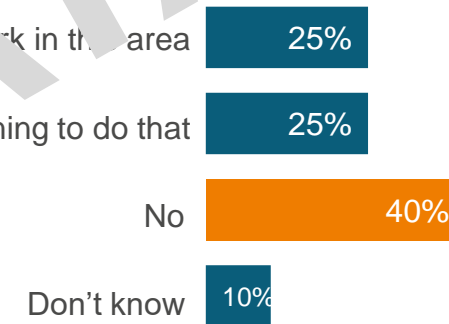
Investing in digital and electronic competencies

Q: Do you see your company hiring more technical profiles in the future, people better trained to deal with digital and electronic products?



Expanding business: monitoring and predictive services

Q: Is data monitoring and predictive business (service) an area you consider entering with your business?

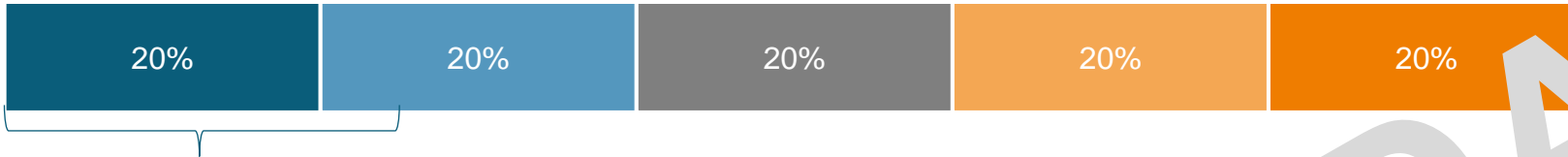


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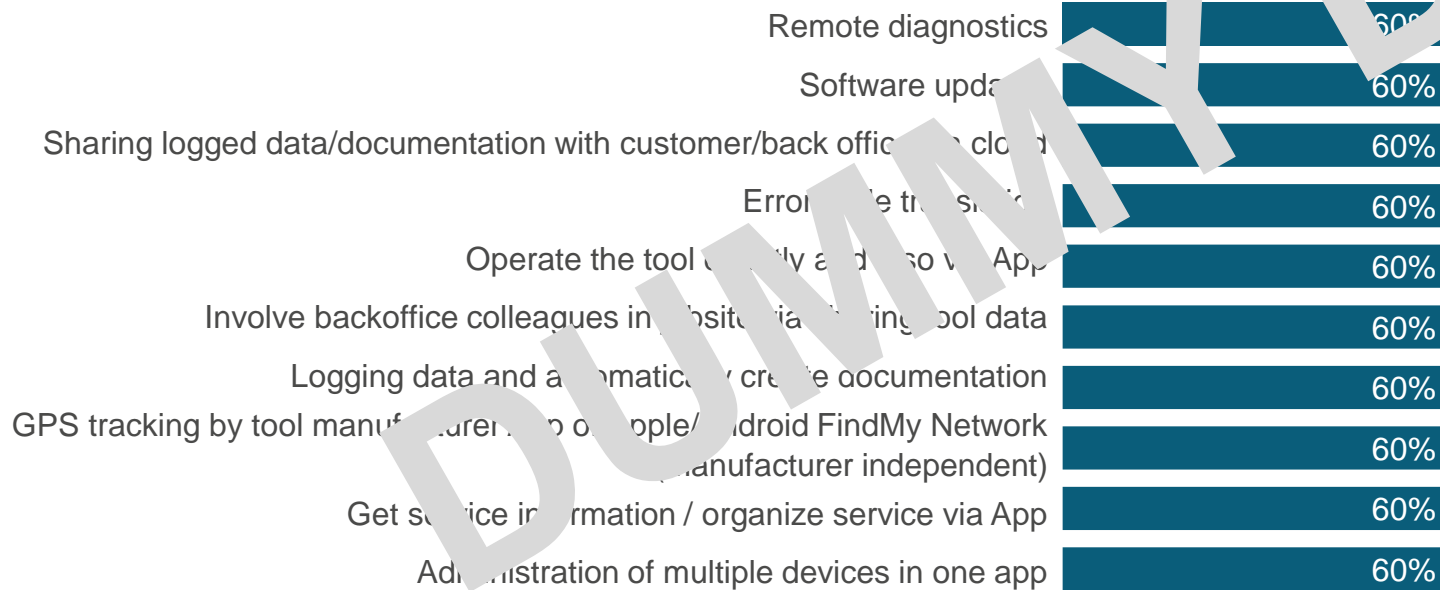
Interest in tool specific apps

Q: Would you be interested in tool-specific apps for smartphones?

Yes, definitely | Rather yes | Neutral | Rather not | Definitely not | Don't know



Functions to be seen in the tool specific app

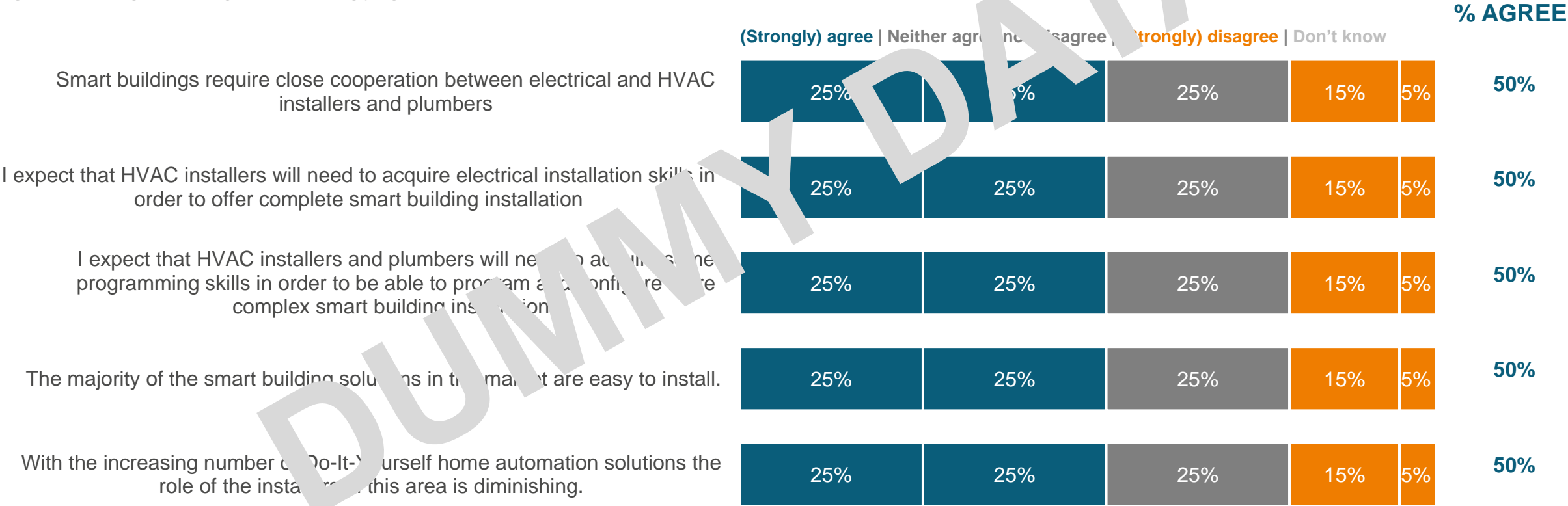


Base: n= 125, all installers

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Installers' sentiment

Q: To what extent do you agree or disagree with any of the following statements. You can answer on a scale of 1 to 5, where 1 = Strongly disagree; 2 = Disagree; 3 = Neither agree, nor disagree; 4 = Agree; 5 = Strongly agree



Base: n= 125, all installers

Index

About European Mechanical Installation Monitor
Key takeaways
Profile of the Mechanical installer
Business development
Theme topic – BIM
BIM users – European overview
United Kingdom
Germany
France
Poland
Belgium
The Netherlands
Appendix



Respondents' background characteristics

Job title of the interviewed respondents and the company size

What is your position within the company?

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

	UK	Germany	France	Poland	Belgium	Netherlands
Owner / Director/ Manager	77%	43%	74%	88%	80%	65%
Plumber/ installer	1%	33%	2%	0%	0%	2%
Buyer/purchaser	9%	4%	2%	0%	5%	5%
Senior buyer/ Senior purchaser	2%	0%	3%	2%	3%	0%
Engineer/designer	2%	2%	4%	2%	0%	4%
Calculator	0%	0%	1%	0%	6%	13%
Project manager	2%	15%	3%	0%	5%	3%
Other	7%	0%	0%	4%	1%	8%
1 - 4 FTE	36%	27%	46%	58%	61%	46%
5 - 14 FTE	42%	40%	41%	26%	26%	18%
15+ FTE	22%	33%	13%	17%	13%	37%

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 29 years

250+ dedicated market research projects annually

- Market specialist
- Dedicated and multi-client research
- Active in the market for 29 years
- 250+ dedicated market research projects annually

Revenue distribution



Research in **38** countries in 2023



43 focus groups



1,778 in-depth interviews



60,353 B2B CATI interviews



101,022 B2C online interviews



Single client research

Examples



Segmentation



**Customer
journey**



Branding



**Concept/
product
research**



**Customer
satisfaction**



Trends



**Distribution
research**



**Market
exploration**



Pricing










**Market
size**



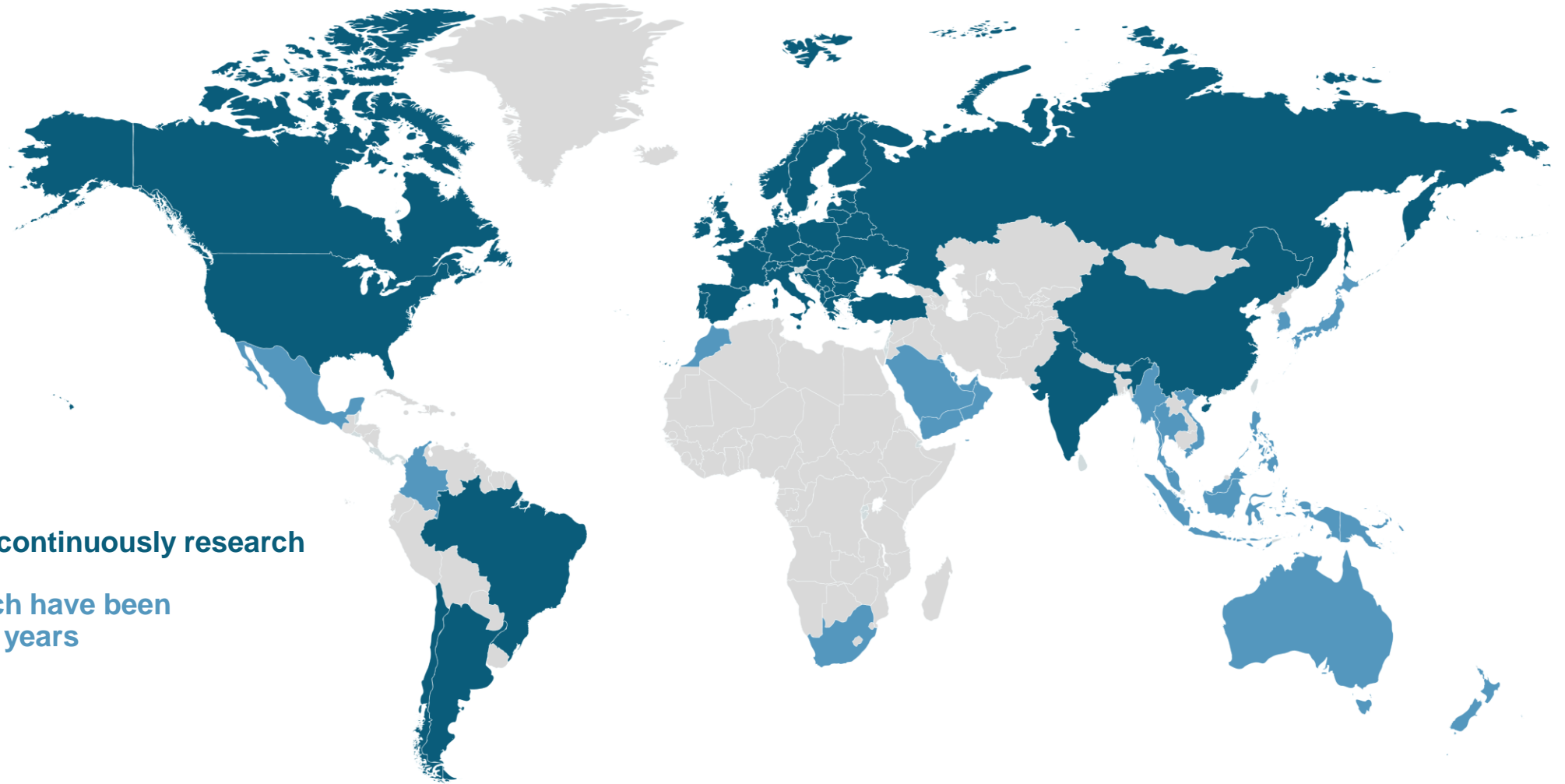
Dedicated market research

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

multi-client research

	European Architectural Barometer	European Contractor Monitor	European Mechanical Installation Monitor	European Electrical Installation Monitor	European Painter Insight Monitor	European Home Improvement Monitor	European Handyman Monitor
Target group	Architects	Building contractors	HVAC installers	Electrical installers	Professional painters	Consumers	Handyman
Methodology							
Annual sample size	3,400 interviews	2,050 interviews	2,600 interviews	3,000 interviews	2,300 interviews	26,400 interviews	3,400 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 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy
Way of reporting	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly	Annually
2024 Theme topics	<ul style="list-style-type: none"> • Q1: Future of construction • Q2: Trends in material usage • Q3: DMU • Q4: Smart materials and buildings 	<ul style="list-style-type: none"> • H1: Prefab • H2: BIM 	<ul style="list-style-type: none"> • Q1: BIM • Q2: Prefab • Q3: Smart and connected products • Q4: Media orientation 	<ul style="list-style-type: none"> • Q1: Sustainability • Q2: Smart and connected products • Q3: Services in the installation market • Q4: Prefab 	<ul style="list-style-type: none"> • Trend tracking • Brand funnels • Sustainability 	<ul style="list-style-type: none"> • Q1: Orientation; sustainability • Q2: Purchase Channels; smart homes and products • Q3: Branding; private labels • Q4: DIY vs DIFM; plans for 2024 	<ul style="list-style-type: none"> • Trends in material usage • Branding
































































































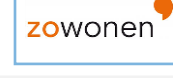
Country coverage



Countries which we continuously research

Other countries which have been researched in past 2 years

A selection of USP Marketing Consultancy's clients

Construction	Installation	DIY	Living & Real Estate
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  

USP Marketing Consultancy

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