



# European Electrical Installation Monitor Q3-24

Theme topic: Prefab

October-2024

A product by

**USP** Marketing Consultancy

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# About European Electrical Installation Monitor

## THE GOAL

To check and track the behaviour and trends in the European electrical installation market. This is done four times per year, by means of phone interviews with registered electrical installation companies, divided over six major European markets.

## THE RESEARCH TOPICS

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

### Quarterly theme topics in 2024:

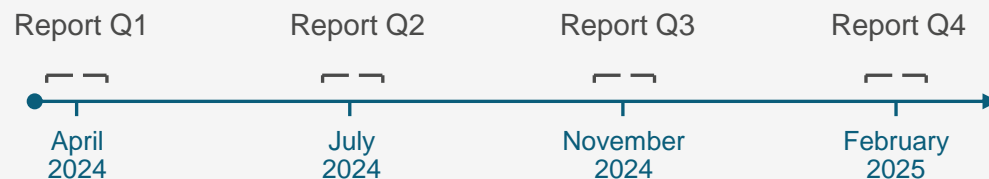
Q1: Sustainability

Q2: Smart & connected products

**Q3: Prefab**

Q4: Services in the installation market

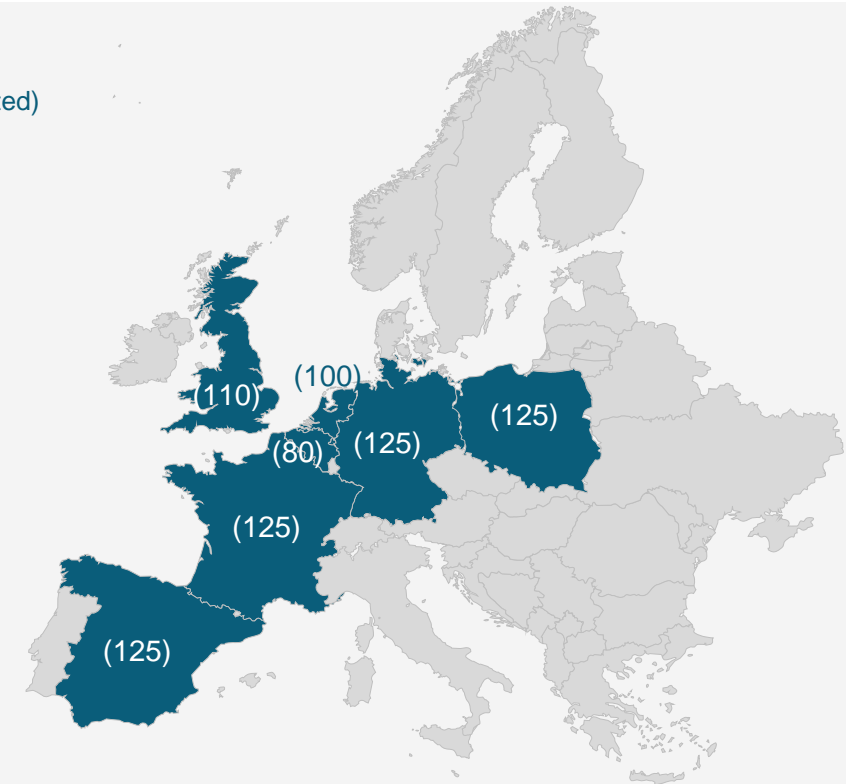
## THE TIMELINE



## COUNTRY SCOPE

(number of interviews conducted)

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



## PROJECT TEAM



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Project Manager

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Senior Research Analyst

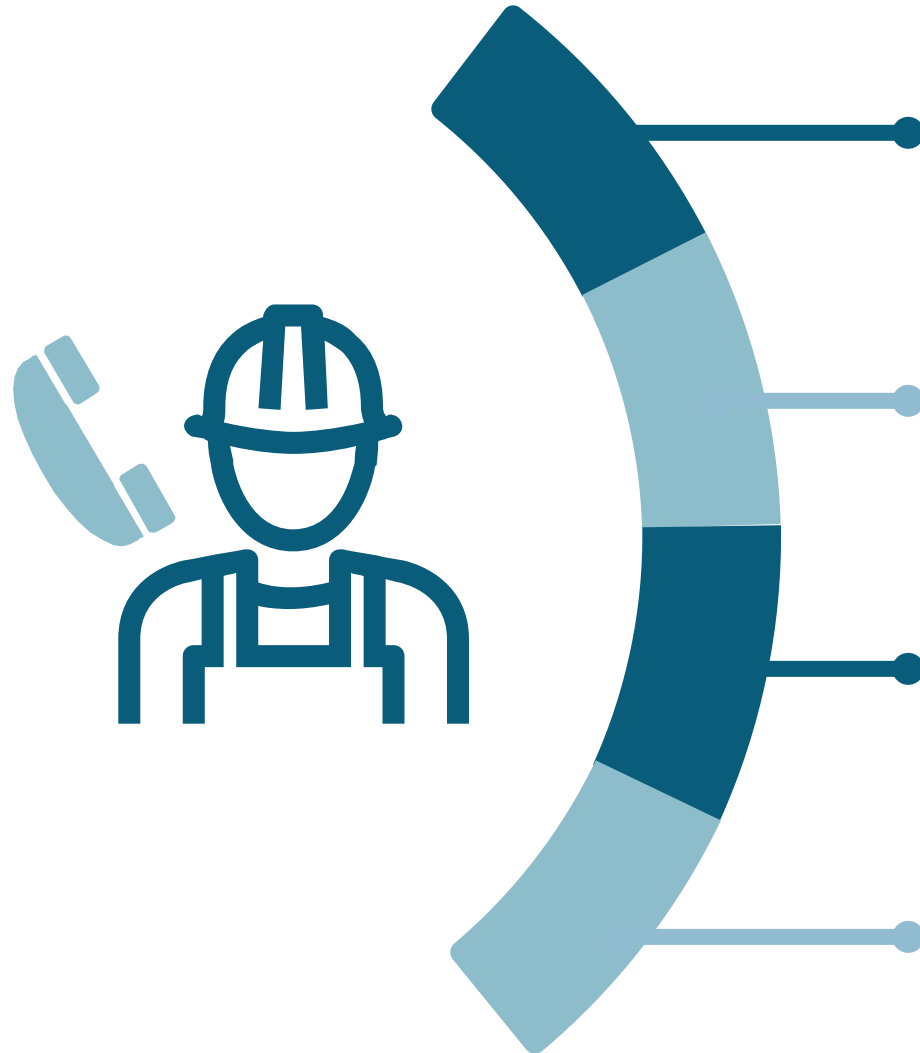
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Research consultant

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# About target group & methodology



## Surveying electrical installation companies...

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

## ... selected from a country-representative database

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

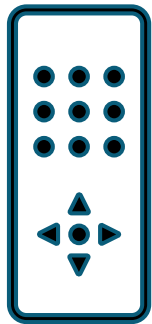
## ... through phone interviews, by native-speaking agents

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

## ... weighting the results based on company size groups

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

# About the Q3 theme topic



## Surveying the Prefab topic...

This quarter, we investigated the topic of prefabrication in the context of electrical installations by asking installers about their involvement with and opinions about prefab solutions for electrical systems in buildings.

Prefab elements for electrical installations are preassembled components like wiring harnesses, pre-wired distribution boards, and modular power units that can be quickly installed on-site.

## ...facilitates faster installation and improved project quality

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

- Installers' involvement and needs regarding prefab electrical installations
- Development and adoption of prefabricated electrical components
- Streamlining on-site work through prefab solutions
- Installers' opinions and attitudes toward the adoption of prefab



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# Key takeaways

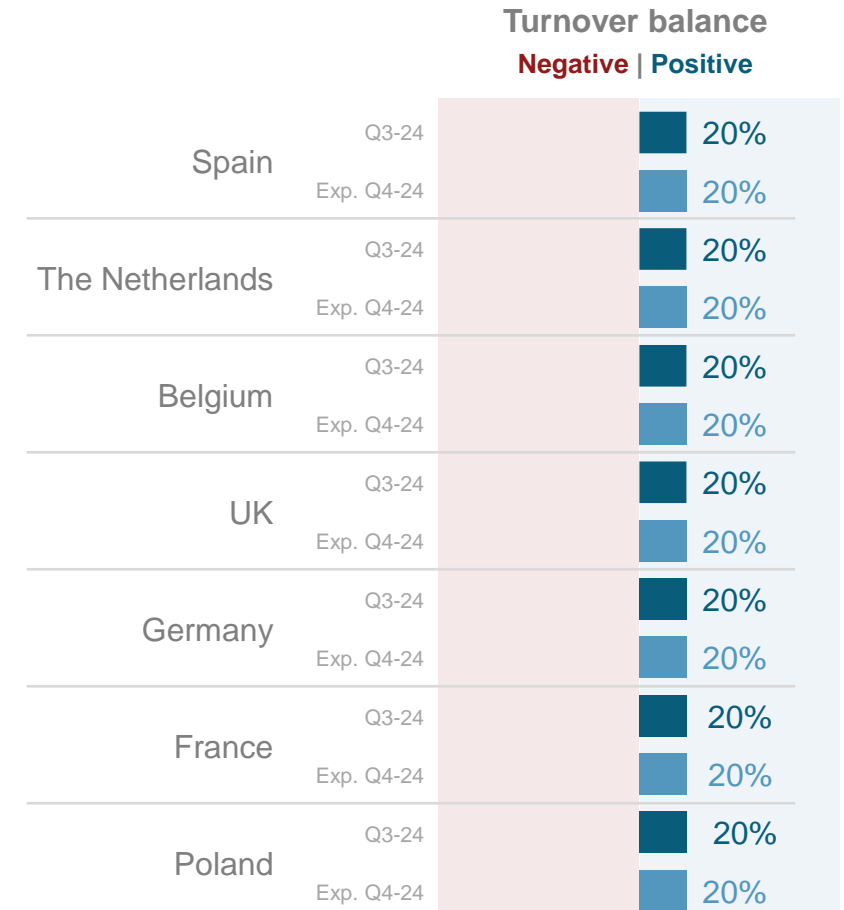
# DUMMY DATA



## Business Development

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# Key takeaways

# DUMMY DATA



## Prefab

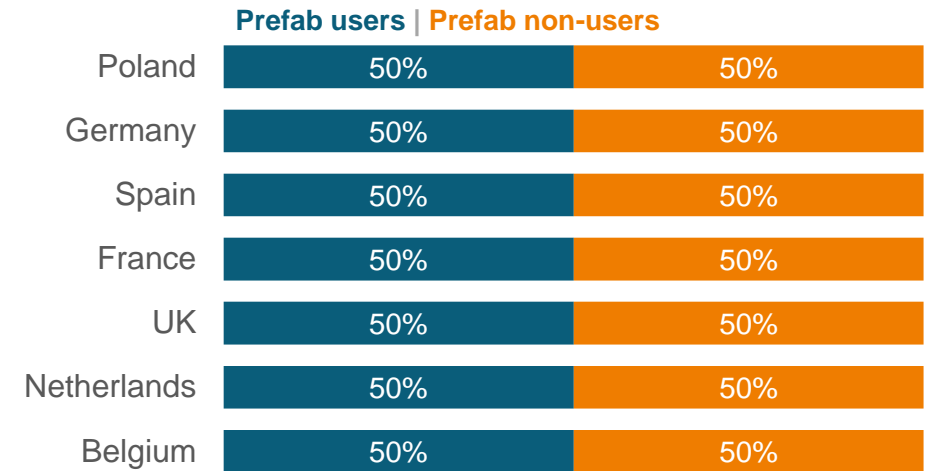
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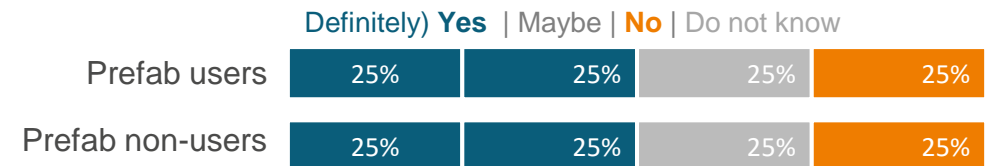
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Prefab distribution among electrical installers in Europe



Usefulness of training

Q: Would you or your company benefit from additional training or certification to use prefabricated electrical products more effectively?





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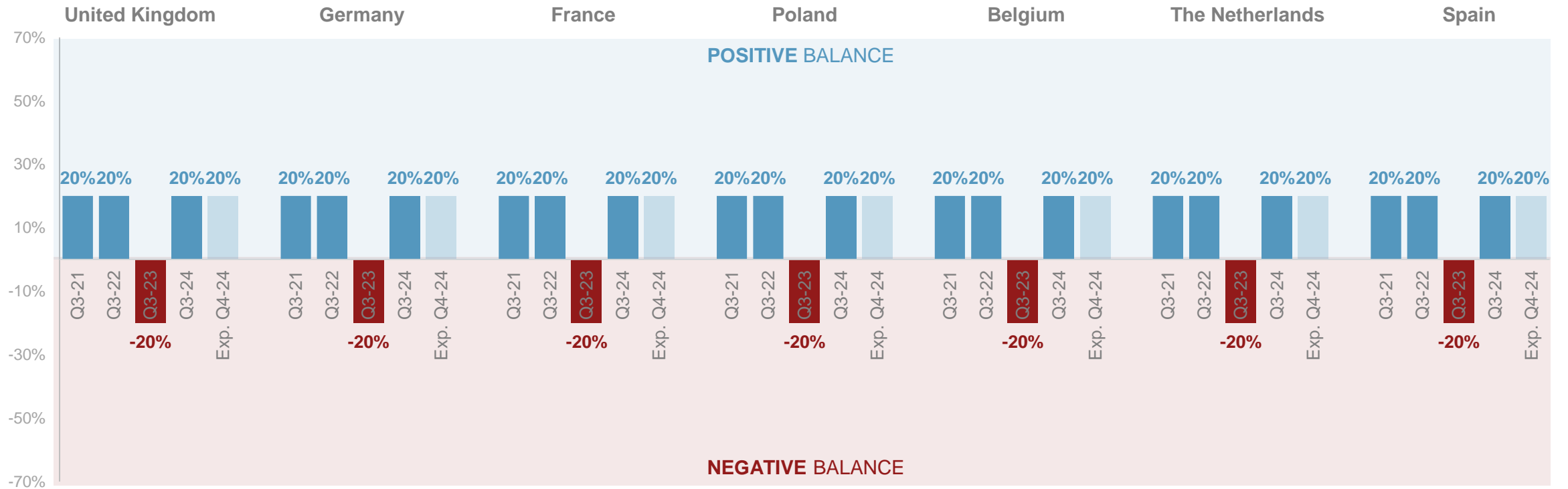
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## DUMMY DATA

### Turnover balance

Q: If you compare your turnover of Q4-23 to the same quarter last year, how did your turnover develop?

(% INCREASE minus % DECREASE)



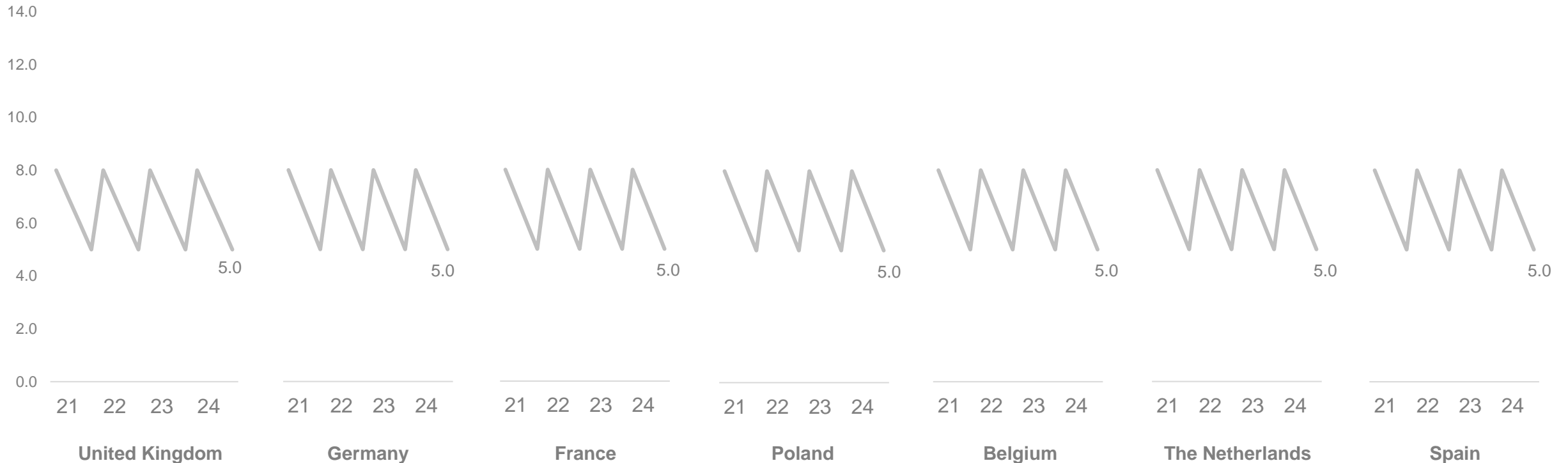
Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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## DUMMY DATA

### Order book portfolio

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



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

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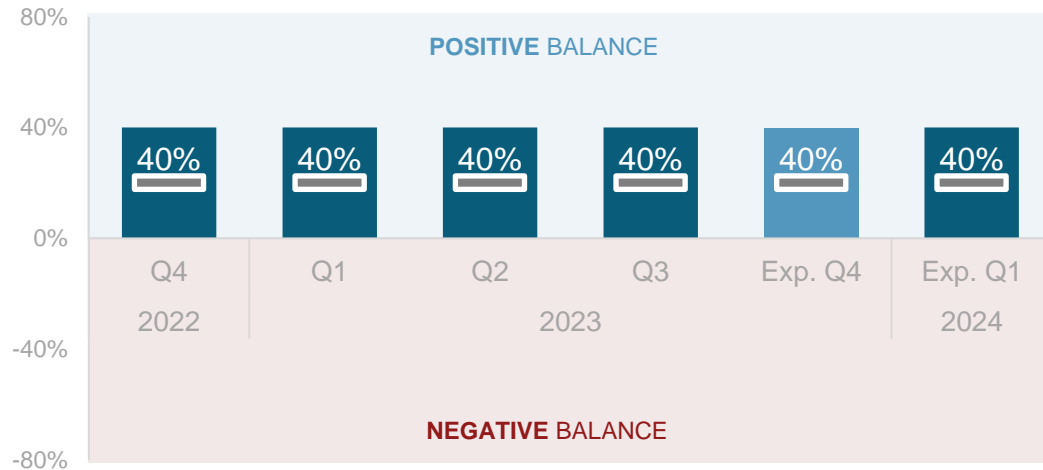
## DUMMY DATA

### Turnover balance

Q: If you compare your turnover of Q4-23 to the same quarter last year, how did your turnover develop? What are your expectations for the development in Q1-24?

TURNOVER BALANCE = % INCREASE minus % DECREASE)

— COMPARISON SAME QUARTER LAST YEAR



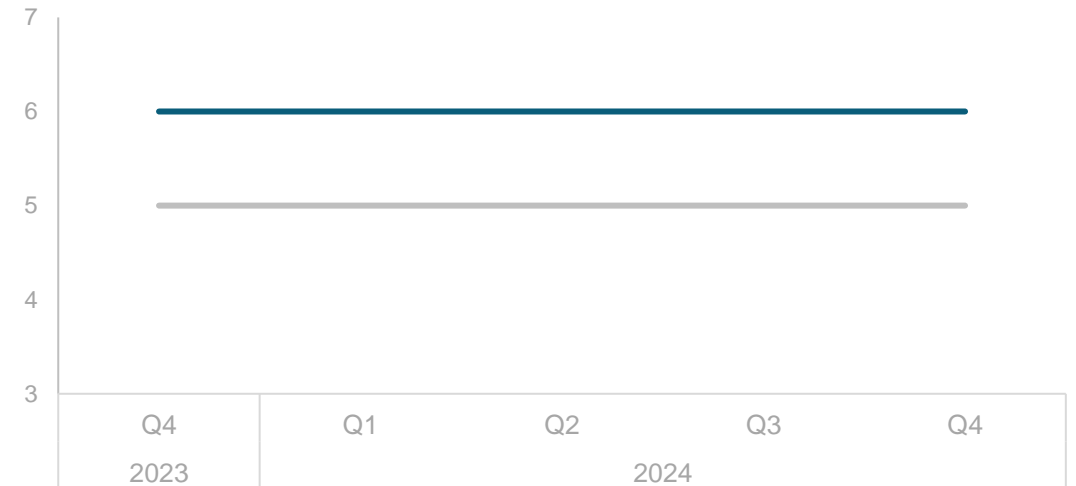
Detailed information regarding the turnover distribution can be found in the [appendix](#).

### Order book portfolio

Q: How big is your current order book portfolio?

ORDER BOOK (MONTHS)

EU | THE UNITED KINGDOM



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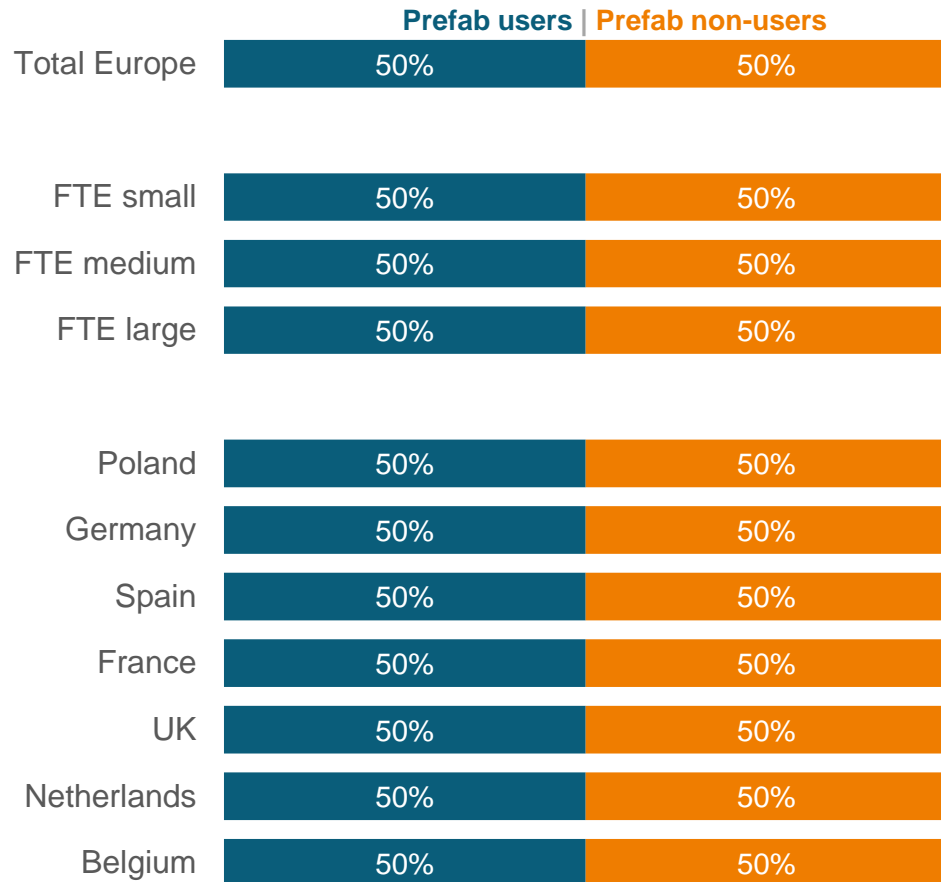


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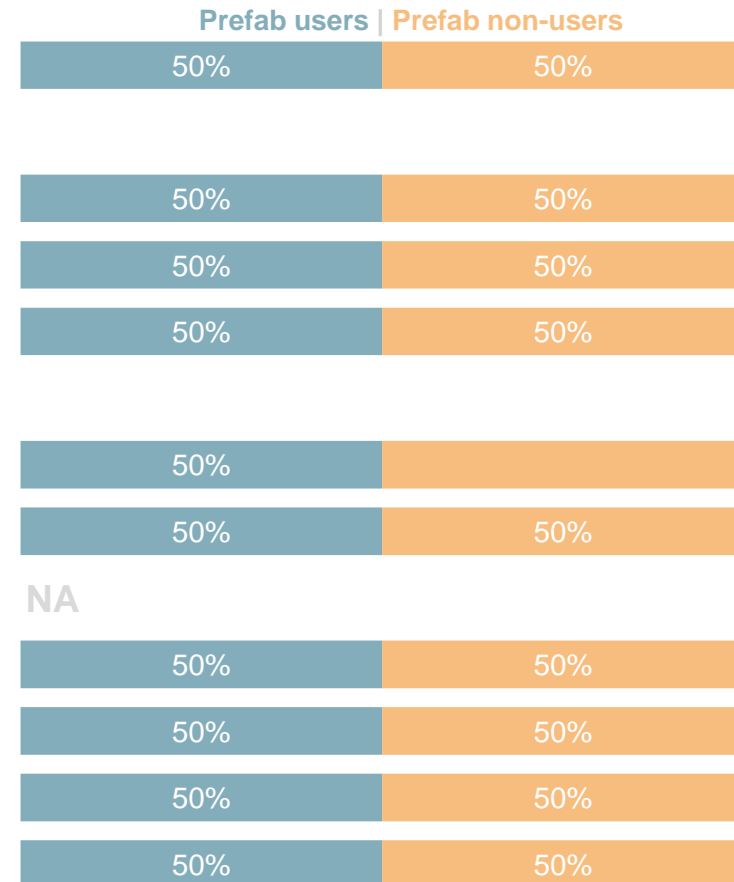
DUMMY DATA

Prefab distribution among Electrical and HVAC installers & plumbers in Europe

Electrical installers



HVAC installers



NA



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DUMMY DATA

**Top 5 areas in which prefab products are potential solution**

*Can you specify the types of installations for which your prefab products are typically used?*

	Europe	The United Kingdom	Germany	France	Poland	Belgium	The Netherlands	Spain
Electrical distribution boards/panels	50%	50%	50%	50%	50%	50%	50%	50%
Electrical installations (e.g., wiring systems, lighting fixtures)	50%	50%	50%	50%	50%	50%	50%	50%
Protective devices - switchgear/control gear assemblies	50%	50%	50%	50%	50%	50%	50%	50%
Cable trays and conduits	50%	50%	50%	50%	50%	50%	50%	50%
Switches and sockets (plug&play ("stekerbaar"))	50%	50%	50%	50%	50%	50%	50%	50%
Smart systems (e.g., automation, security systems)	50%	50%	50%	50%	50%	50%	50%	50%
Photovoltaic system installations	50%	50%	50%	50%	50%	50%	50%	50%

Asked to all prefab users

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DUMMY DATA

**Most interesting/ needed prefab solutions for electrical installers**

	Europe	The United Kingdom	Germany	France	Poland	Belgium	The Netherlands	Spain
Pre-assembled products for electrical installations – wiring systems, control panels, etc.	50%	50%	50%	50%	50%	50%	50%	50%
A combination of prefabricated elements that differ per installation types – e.g. electrical and data cabling, lighting and automation	50%	50%	50%	50%	50%	50%	50%	50%
Prefabricated solutions, such as complete electrical rooms, switchgear assemblies, switches/sockets etc.	50%	50%	50%	50%	50%	50%	50%	50%
Prefab services such as design, bundling of products or pre-wired panels	50%	50%	50%	50%	50%	50%	50%	50%

Asked to all prefab users

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DUMMY DATA

**Top 5 selection criteria of a manufacturer of prefabricated solutions**

*What are the most important criteria when selecting a manufacturer or supplier of prefabricated solutions?*

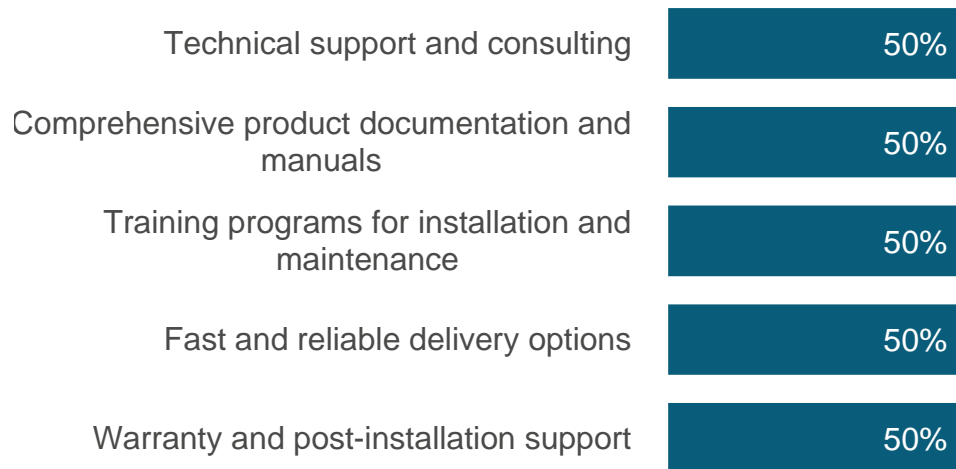
	Europe	The United Kingdom	Germany	France	Poland	Belgium	The Netherlands	Spain
Quality of products	50%	50%	50%	50%	50%	50%	50%	50%
Price of offered solution	50%	50%	50%	50%	50%	50%	50%	50%
Well known brand	50%	50%	50%	50%	50%	50%	50%	50%
Simple and safe to install	50%	50%	50%	50%	50%	50%	50%	50%
Availability/ lead time	50%	50%	50%	50%	50%	50%	50%	50%

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# DUMMY DATA

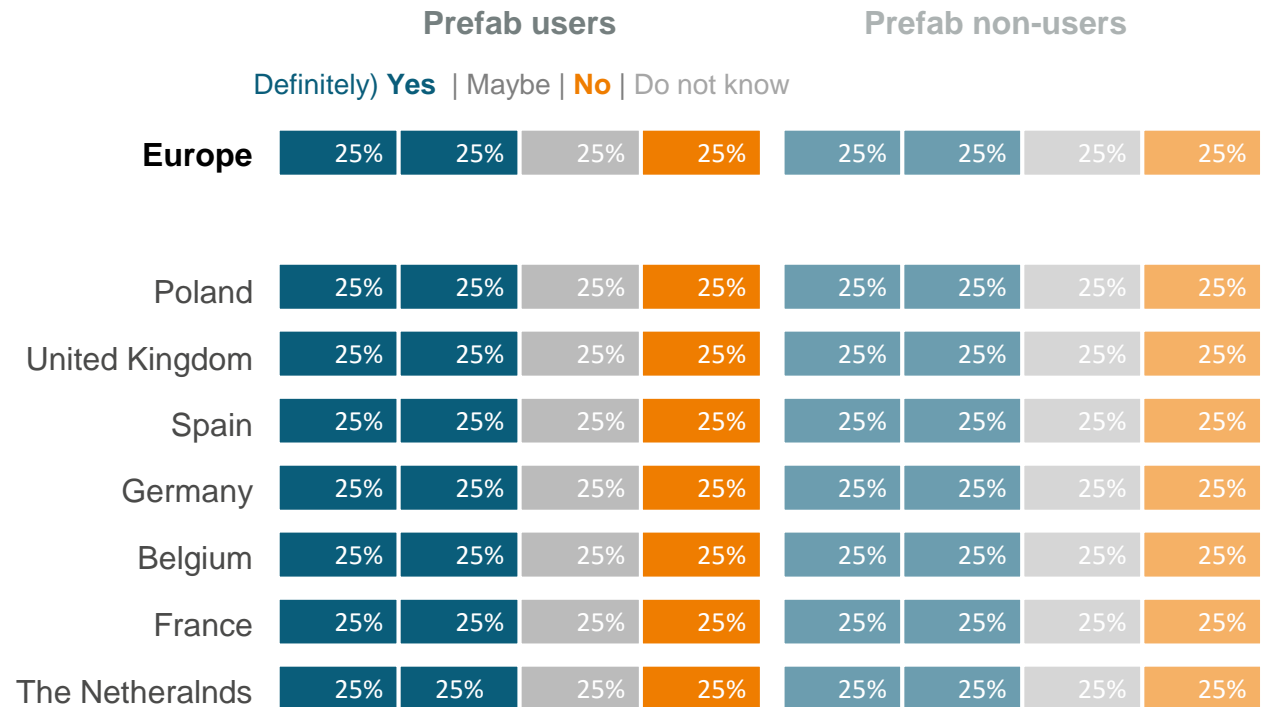
## Top 5 types of support needed from manufacturers

What kind of support or services from manufacturers or suppliers would help you work more effectively with prefab products?



## Usefulness of training

Would you or your company benefit from additional training or certification to use prefabricated electrical products more effectively?



Base: N=790, Asked to all

Base: N=790, Asked to all

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**Statements**

% AGREE minus % DISAGREE

DUMMIEDATA

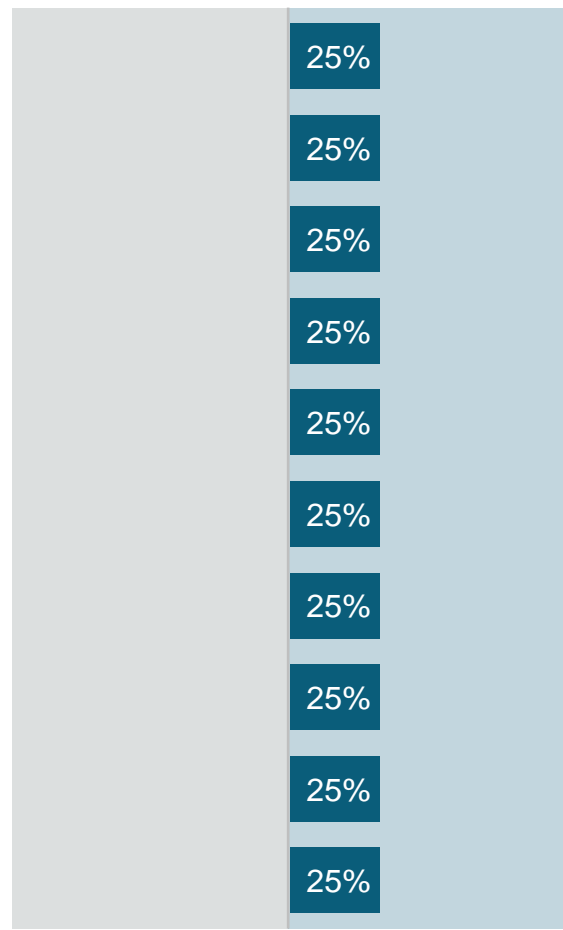
**Prefab users**

More disagree | More agree

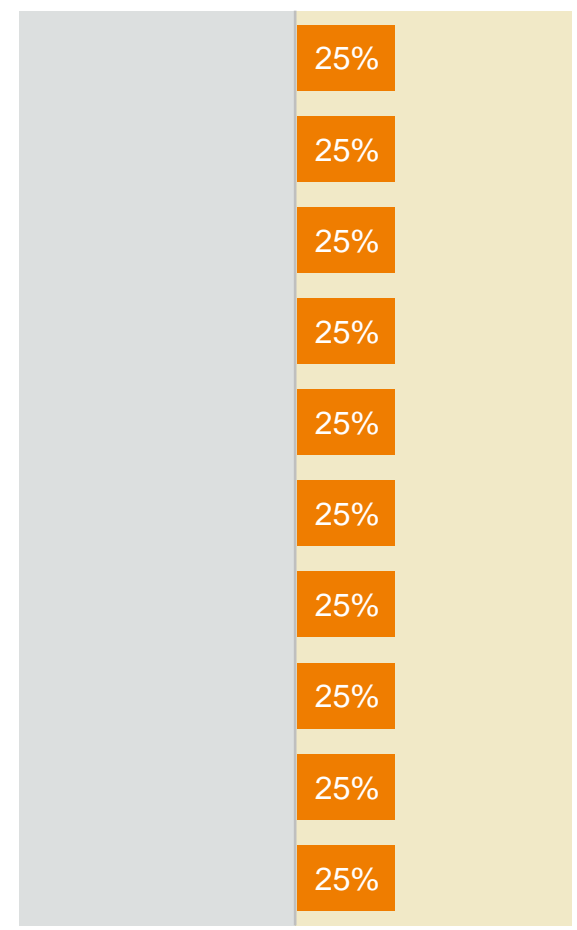
**Prefab non-users**

More disagree | More agree

- Prefab reduces the duration of a project (from design to delivery) substantially
- Prefab fits newbuild projects the best
- Prefab requires good BIM model
- Prefab is worth to be used only in projects with repetitive installation such as multifamily housing
- Failure costs will be reduced to a minimum with prefab
- Prefab is a way to improve quality of the installation
- Prefab limits the freedom of design
- Prefab is the best solution for labour shortage
- Using prefab elements reduces liability and risks for our company
- Prefab fits renovation projects the best



Base: n=617, Asked to Prefab users



Base: n=173, Asked to Prefab non-users

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# DUMMY DATA

## Distribution users and non-users of prefab



**50%** Users  
**50%** Non-users

	Up to 4 FTE	5-14 FTE	≥15 FTE
Users	50%	50%	50%
Non-users	50%	50%	50%

Base: N=XX, Asked all

## Dealing with prefabrication

*How is your company dealing with prefabrication?*

	Up to 4 FTE	5-14 FTE	≥15 FTE
Purchase solutions from wholesalers	50%	50%	50%
Prefab yourself – buy and preassemble the separate products	50%	50%	50%
Purchase solutions from manufacturers	50%	50%	50%
Purchase solutions from specialised prefab suppliers	50%	50%	50%

Prefab installation works are **50%** of the total installation works

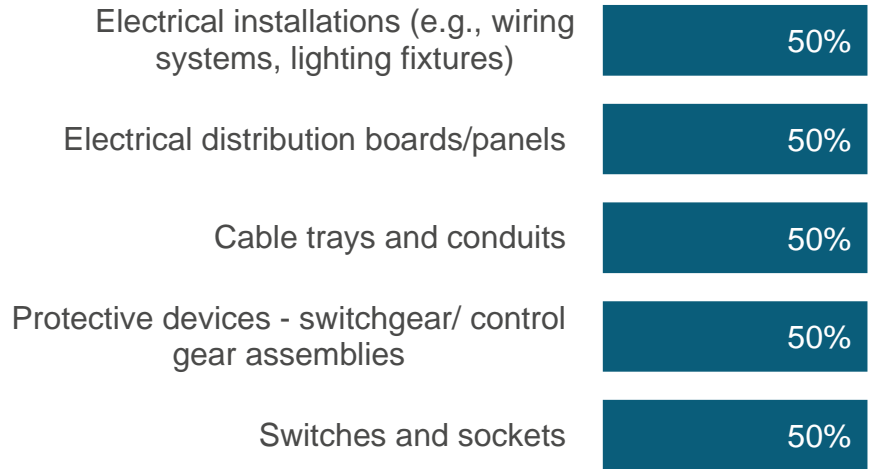
Base: n=XX, Asked to Prefab users

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DUMMY DATA

**Top 5 areas in which prefab products are potential solution**

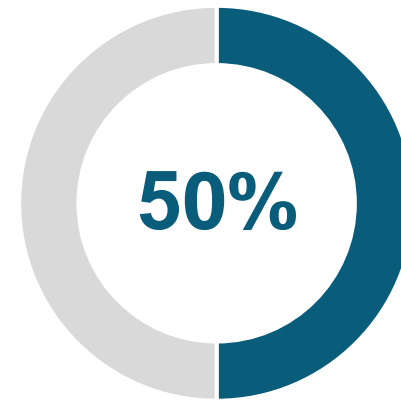
*Can you specify the types of installations for which your prefab products are typically used?*



Base: n=XX, Asked to Prefab users

**Projects with prefab in the last 2 years**

*When you look at your projects from the past 2 years, what percentage of your projects contained some form of prefabrication/ off-site installations?*



**Of the projects have some form of prefab**

*Has the share of projects that contained some kind of prefabrication or off-site installation increased, decreased or remained the same in the last 2 years?*

(Significant increase >25%) **Moderate increase 0-25%** | No change | (Moderate decrease 0-25%) **Significant decrease >25%** | Do not know



Base: n=XX, Asked to Prefab users

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DUMMY DATA

**Top 5 selection criteria of a manufacturer of prefabricated solutions**

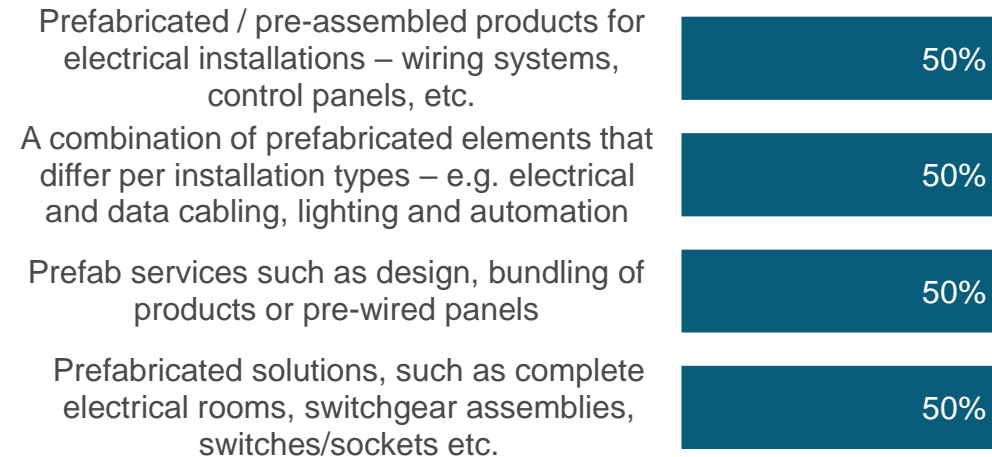
*What are the most important criteria when selecting a manufacturer or supplier of prefabricated solutions?*



Base: n=XX, Asked to Prefab users

**Most preferred prefabricated solutions**

*Which types of prefabricated solutions are you most interested in?*



Base: n=XX, Asked to Prefab users

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DUMMY DATA

**Top 5 reasons for not working with prefab electrical products**

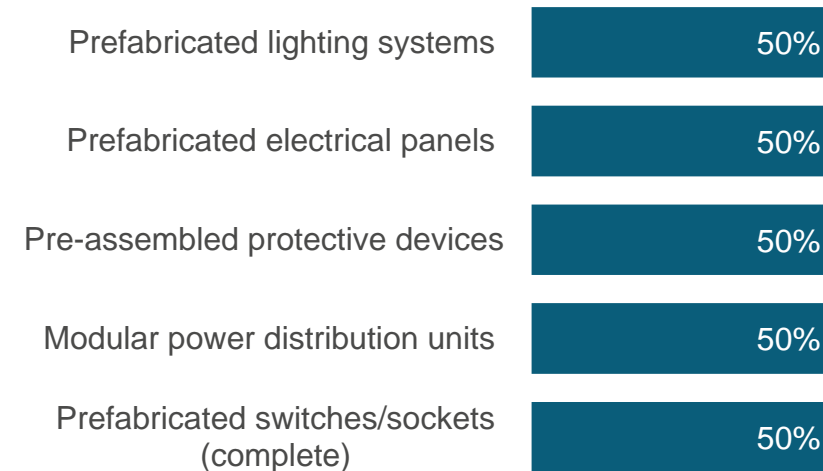
*What are the main reasons for you not to work with prefab electrical products?*



Base: n=XX, Asked to Prefab non-users

**Most desired types of prefabricated solutions among electrical installers**

*Which types of prefabricated electrical solutions would enhance the ease and efficiency of your work?*



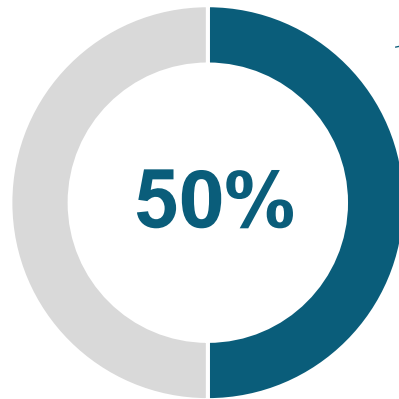
Base: N=XX, Asked all

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DUMMY DATA

### Most desired types of prefabricated solutions among electrical installers

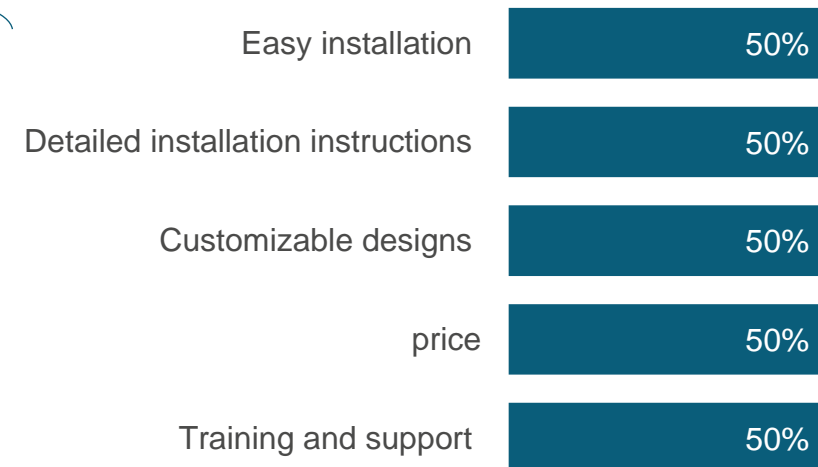
*Which types of prefabricated solutions are you most interested in?*



**Of installers think prefabricated lighting systems would enhance the ease and efficiency of their work**

### Top 5 needs regarding prefabricated lighting systems

*What do you need to effectively use prefabricated lighting systems in your projects?*

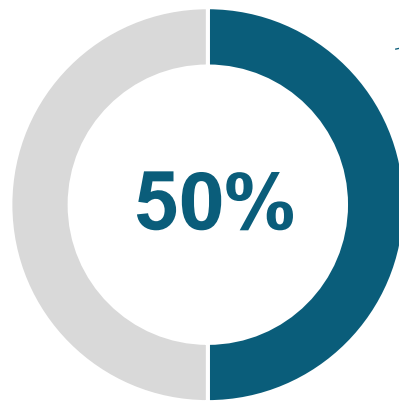


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DUMMY DATA

### Most desired types of prefabricated solutions among electrical installers

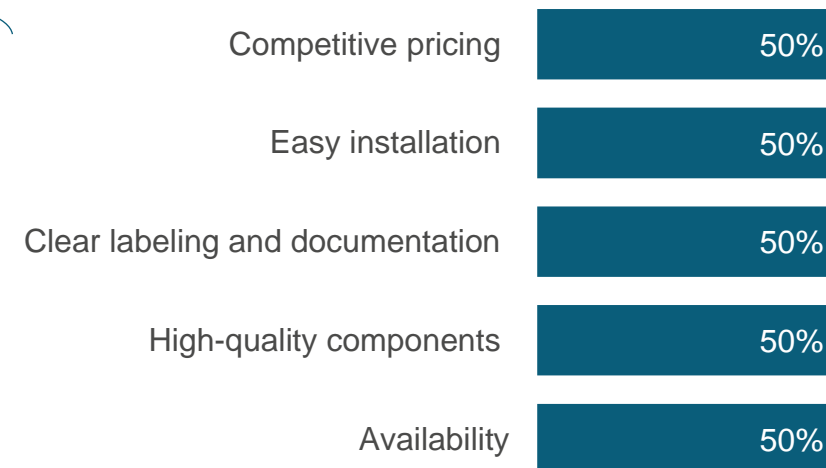
*Which types of prefabricated solutions are you most interested in?*



Of installers think Prefabricated electrical panels could enhance the ease and efficiency of their work

### Top 5 needs regarding prefabricated electrical panels

*What do you need to effectively use prefabricated electrical panels in your projects?*



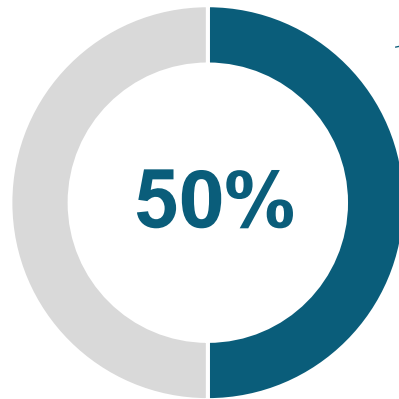


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DUMMY DATA

**Most desired types of prefabricated solutions among electrical installers**

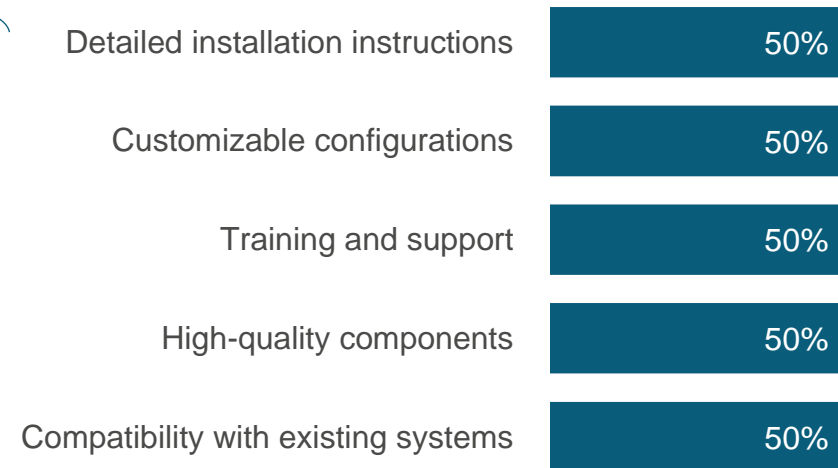
*Which types of prefabricated solutions are you most interested in?*



**Of installers think pre-assembled protective devices like switchgear and control gear assemblies would enhance the ease and efficiency of their work**

**Top 5 needs regarding pre-assembled protective devices like switchgear and control gear assemblies**

*What do you need to effectively use pre-assembled protective devices like switchgear and control gear assemblies in your projects?*

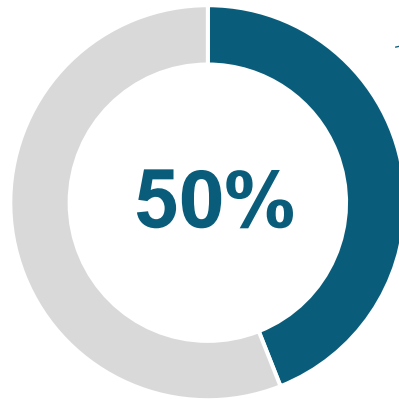


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DUMMY DATA

**Most desired types of prefabricated solutions among electrical installers**

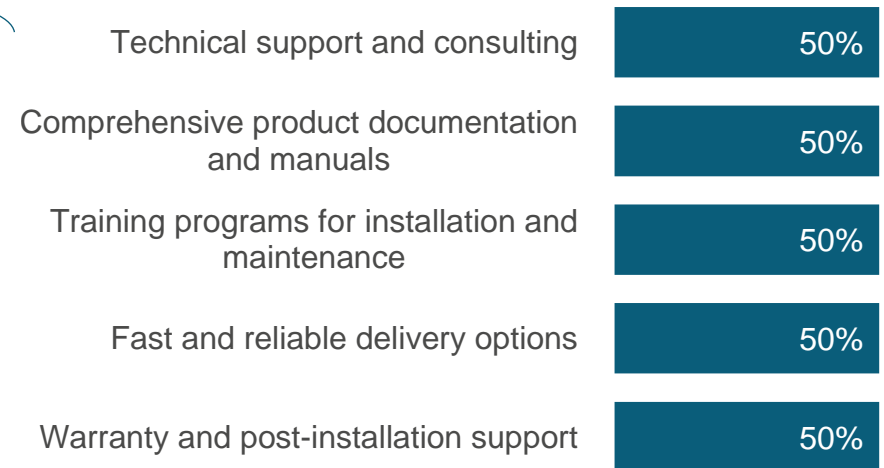
*Which types of prefabricated solutions are you most interested in?*



**Of installers think prefabricated modular power distribution units would enhance the ease and efficiency of their work**

**Top 5 needs regarding prefabricated modular power distribution units**

*What do you need to effectively use modular power distribution units in your projects?*

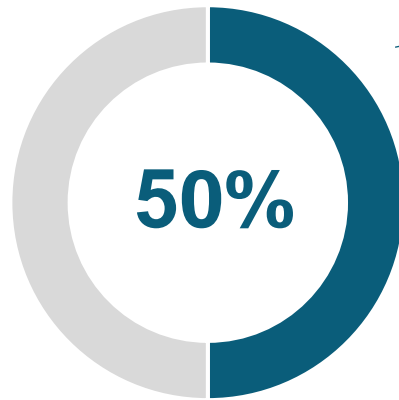


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DUMMY DATA

### Most desired types of prefabricated solutions among electrical installers

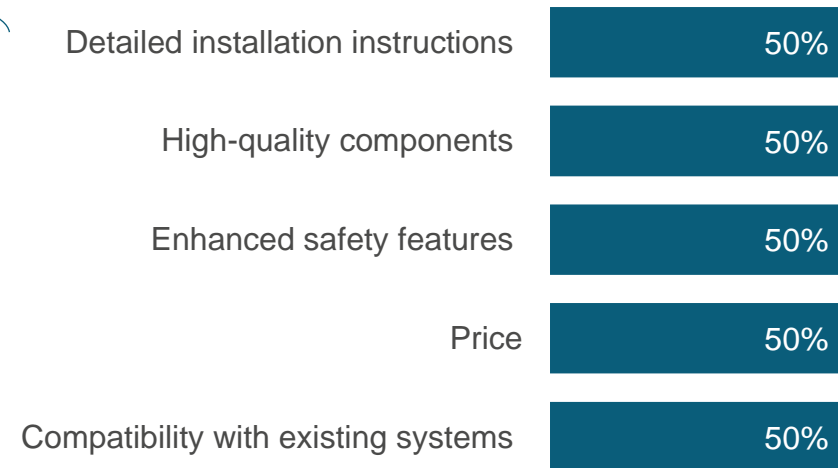
Which types of prefabricated solutions are you most interested in?



Of installers think pre-assembled switches & sockets would enhance the ease and efficiency of their work

### Top 5 needs regarding pre-assembled switches & sockets

What do you need to effectively use pre-assembled switches & sockets in your projects?

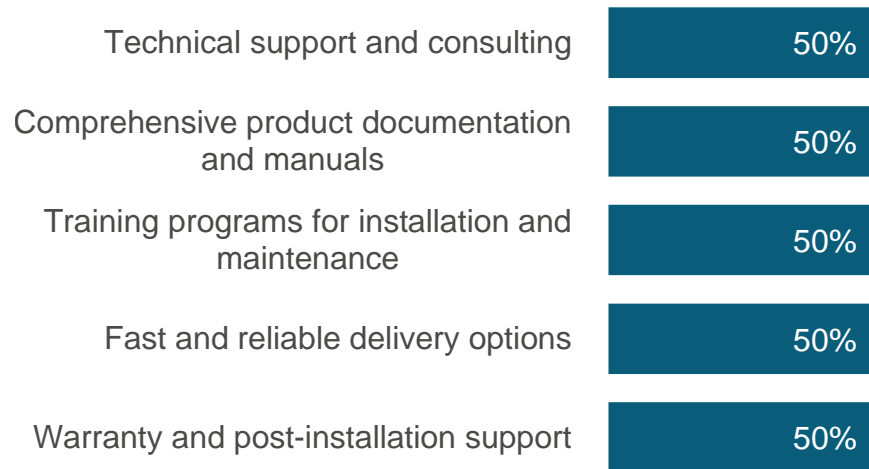


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### Top 5 types of support needed from manufacturers

What kind of support or services from manufacturers or suppliers would help you work more effectively with prefab products?



### Development of prefab in next 3 to 5 years

What are your expectations for the development of prefabrication in electrical installations over the next 3 to 5 years?

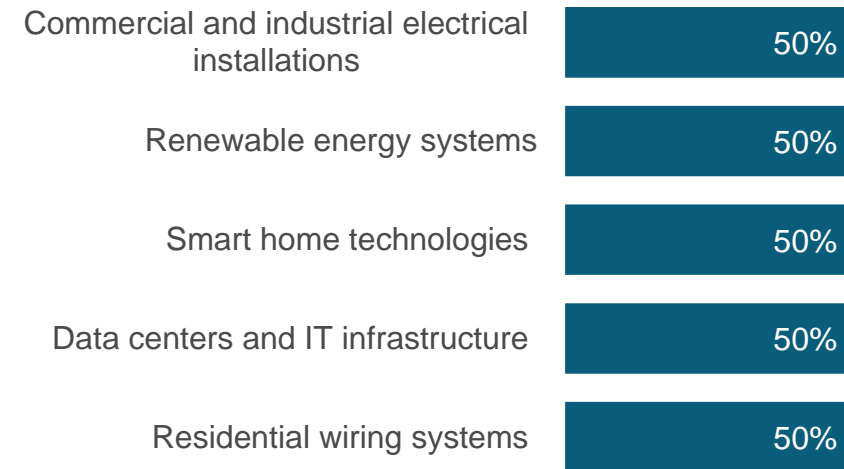
(Significant increase >25%) **Moderate increase 0-25%** | No change | (Moderate decrease 0-25%) **Significant decrease >25%** | Do not know



Base: N=XX, Asked all

### Top 5 areas of electrical installations with the greatest prefab potential

In which areas of electrical installations do you see the greatest potential for prefabrication in the future?



### Usefulness of training

Would you or your company benefit from additional training or certification to use prefabricated electrical products more effectively?

(Definitely) **Yes** | Maybe | **No** | Do not know



Base: N=XX, Asked all

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DUMMY DATA

**Agreement with prefab statements**

To what degree do you agree or disagree with the following statements about prefab? By prefab we mean off-site construction or modern methods of construction. You can answer on a scale of 1 (strongly disagree) to 5 (strongly agree)

	(Strongly) agree	Neither agree nor disagree	(Strongly) disagree	Don't know
Prefab reduces the duration of a project (from design to delivery) substantially	20%	20%	20%	20%
Prefab fits new build projects the best	20%	20%	20%	20%
Prefab requires a good BIM model	20%	20%	20%	20%
Prefab limits the freedom of design	20%	20%	20%	20%
Prefab is the best solution for labor shortage	20%	20%	20%	20%
Using prefab elements reduces liability and risks for our company	20%	20%	20%	20%
Prefab is worth being used only in projects with repetitive installation such as multifamily housing	20%	20%	20%	20%
Failure costs will be reduced to a minimum with prefab	20%	20%	20%	20%
Prefab is a way to improve the quality of the installation	20%	20%	20%	20%
Prefab fits renovation projects the best	20%	20%	20%	20%

Base: N=XX, Asked all

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# Respondents' background characteristics

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## 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?

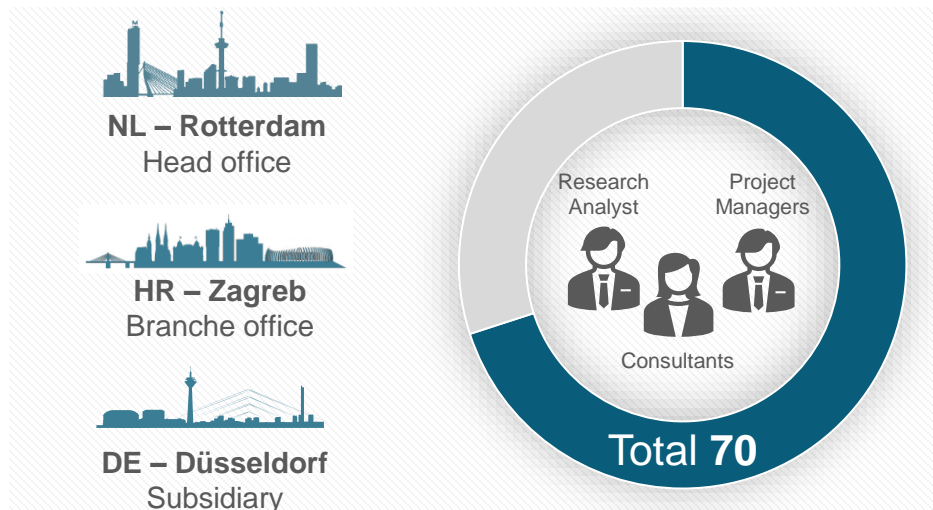
	UK	Germany	France	Poland	Belgium	Netherlands	Spain
Owner / director / manager	50%	50%	50%	50%	50%	50%	50%
Project manager	50%	50%	50%	50%	50%	50%	50%
Engineer / designer	50%	50%	50%	50%	50%	50%	50%
Installer	50%	50%	50%	50%	50%	50%	50%
Calculator / work planner	50%	50%	50%	50%	50%	50%	50%
Purchaser	50%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

Q2 2024 data, unweighted

# About USP Marketing Consultancy

## USP Marketing Consultancy

-  Over 30 years internationally operating market research and consultancy agency specialized in the construction, DIY, installation and real estate market.
-  Multi-client and dedicated research.
-  Active in more than 30 countries per year.
































































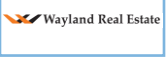




































# Multi-client monitors of USP Marketing Consultancy

	European Architectural Barometer	European Contractor Monitor	European Mechanical installation monitor	European Electrical Installation Monitor	European Painter insight Monitor	European Home Improvement Monitor
<b>Target group</b>	Architects	Contractors	HVAC installers	Electrical installers	Professional painters	Consumers
<b>Methodology</b>	Phone interviews	Phone interviews	Phone interviews	Phone interviews	Phone interviews	Online interviews
<b>Interviews per time</b>	100-125 per country	100-125 per country	100-125 per country	100-125 per country	150-250 per country	600 per country
<b>Countries</b>	<ul style="list-style-type: none"> <li>Germany</li> <li>United Kingdom</li> <li>France</li> <li>The Netherlands</li> <li>Belgium</li> <li>Poland</li> <li>Spain</li> <li>Italy</li> </ul>	<ul style="list-style-type: none"> <li>Germany</li> <li>United Kingdom</li> <li>France</li> <li>The Netherlands</li> <li>Belgium</li> <li>Poland</li> <li>Spain</li> <li>Italy</li> </ul>	<ul style="list-style-type: none"> <li>Germany</li> <li>United Kingdom</li> <li>France</li> <li>The Netherlands</li> <li>Belgium</li> <li>Poland</li> </ul>	<ul style="list-style-type: none"> <li>Germany</li> <li>United Kingdom</li> <li>France</li> <li>The Netherlands</li> <li>Belgium</li> <li>Poland</li> <li>Spain</li> </ul>	<ul style="list-style-type: none"> <li>Germany</li> <li>United Kingdom</li> <li>France</li> <li>The Netherlands</li> <li>Belgium</li> <li>Poland</li> <li>Spain</li> <li>Italy</li> <li>Denmark</li> <li>Sweden</li> </ul>	<ul style="list-style-type: none"> <li>Germany</li> <li>United Kingdom</li> <li>France</li> <li>The Netherlands</li> <li>Belgium</li> <li>Poland</li> <li>Spain</li> <li>Italy</li> <li>Denmark</li> <li>Sweden</li> <li>Austria</li> </ul>
<b>Frequency</b>	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly
<b>Themes 2022</b>	Sustainability Trends in material usage Decision making Brand Health Scan	Prefabrication Digitalisation and BIM	Digitalisation and BIM Prefabrication Smart buildings and products Media orientation	Sustainability Smart buildings and products Services in the installation market	Trend tracking Sustainability Labour shortage Online buying Media orientation	Orientation; rise of digital natives Purchase Channels; online leaders Brand health check DIY vs DIFM; outsourcing jobs

# Multi-client monitors of USP Marketing Consultancy

	European Handyman Monitor	European Garden Monitor	KeukenMonitor	BouwMonitor
<b>Target group</b>	Handyman	Consumers	Consumers	Construction, installation, real estate
<b>Methodology</b>	Phone interviews	Online interviews	Online interviews	Online interviews
<b>Interviews per time</b>	200 per country	800 per country	3.600	600
<b>Countries</b>	<ul style="list-style-type: none"> <li>Germany</li> <li>United Kingdom</li> <li>France</li> <li>The Netherlands</li> <li>Poland</li> <li>Spain</li> <li>Italy</li> </ul>	<ul style="list-style-type: none"> <li>Germany</li> <li>United Kingdom</li> <li>France</li> <li>The Netherlands</li> <li>Belgium</li> <li>Poland</li> <li>Sweden</li> <li>Austria</li> </ul>	<ul style="list-style-type: none"> <li>The Netherlands</li> </ul>	<ul style="list-style-type: none"> <li>The Netherlands</li> </ul>
<b>Frequency</b>	Quarterly	Annually	Annually	Quarterly
<b>Themes 2022</b>	Trend tracking Activities and product usage Purchase and decision behaviour Brand performance scans	Smart Garden Sustainable Garden City Gardening Health Gardening Outdoor living	Sustainability Smart Kitchens	Trend tracking

# A selection of USP Marketing Consultancy's clients

Construction	Installation	DIY	Living & Real Estate
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  

# USP Marketing Consultancy

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