



European Electrical Installation Monitor Q4-2024

Theme topic: Services in the installation sector

January 2025

A product by

USP Marketing Consultancy

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Key takeaways

Profile of the electrical installer

Business development

Theme topic – Services in the installation sector

Cross country summary

United Kingdom

Germany

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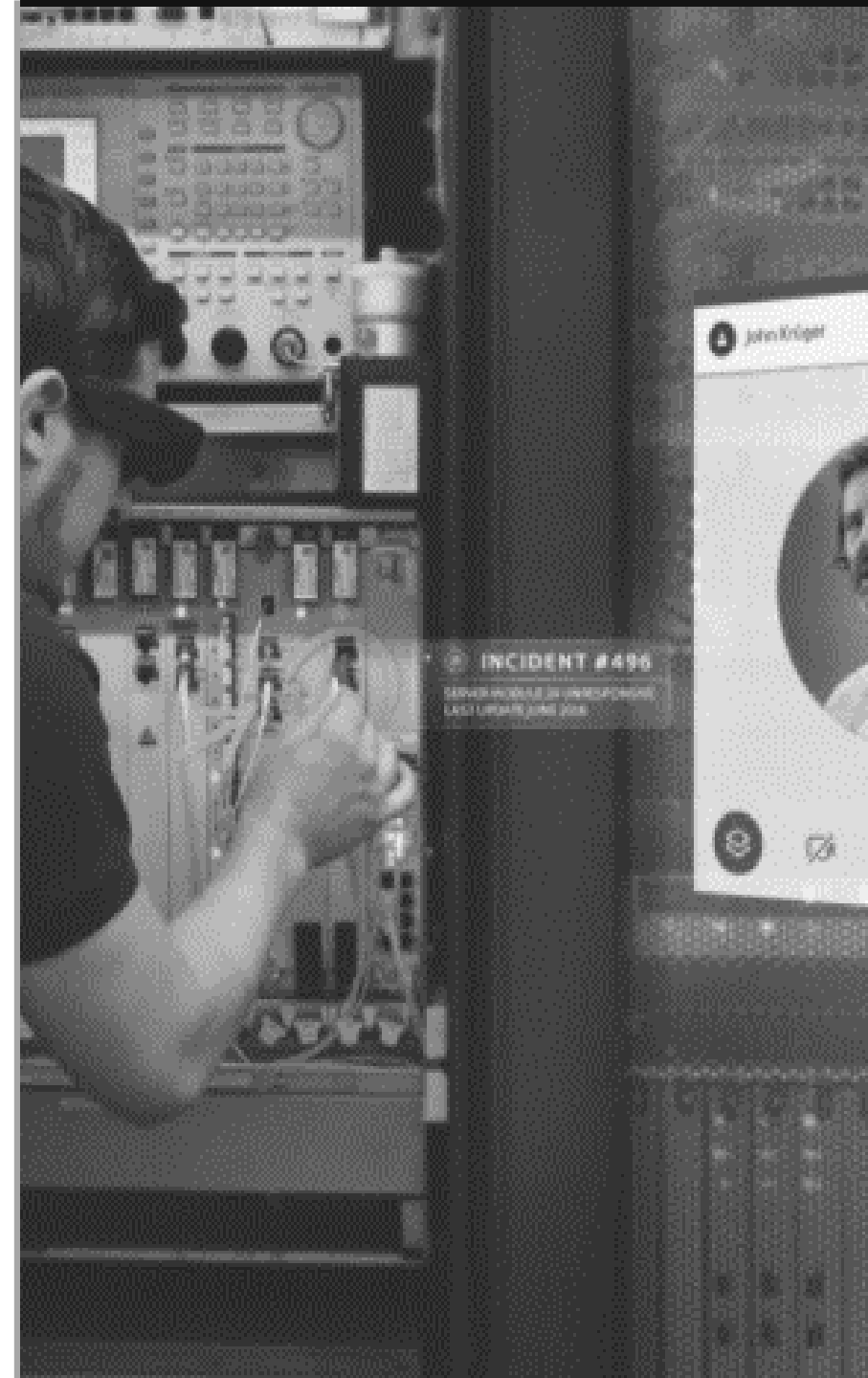
Poland

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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:

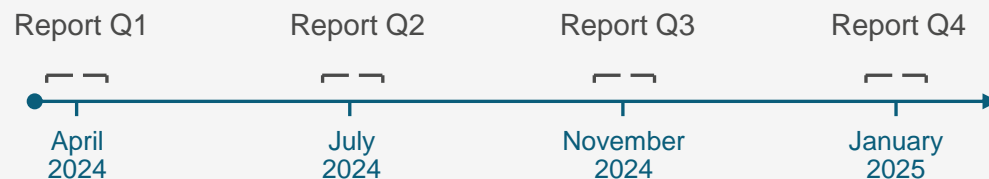
Q1: Sustainability

Q2: Smart & connected products

Q3: Prefab

Q4: Services in the installation market

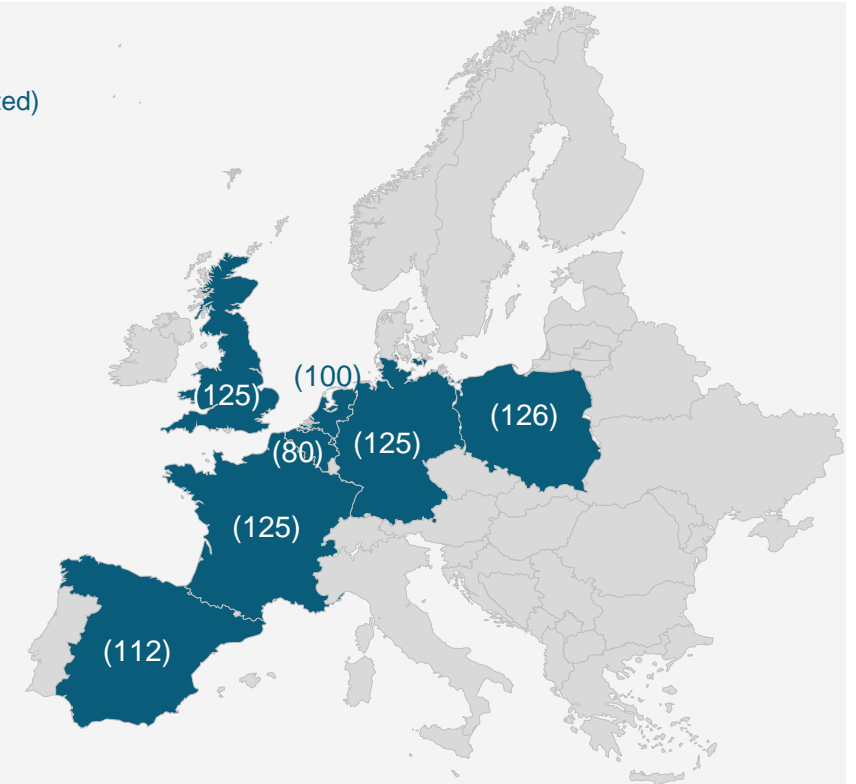
THE TIMELINE



COUNTRY SCOPE

(number of interviews conducted)

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



PROJECT TEAM



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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

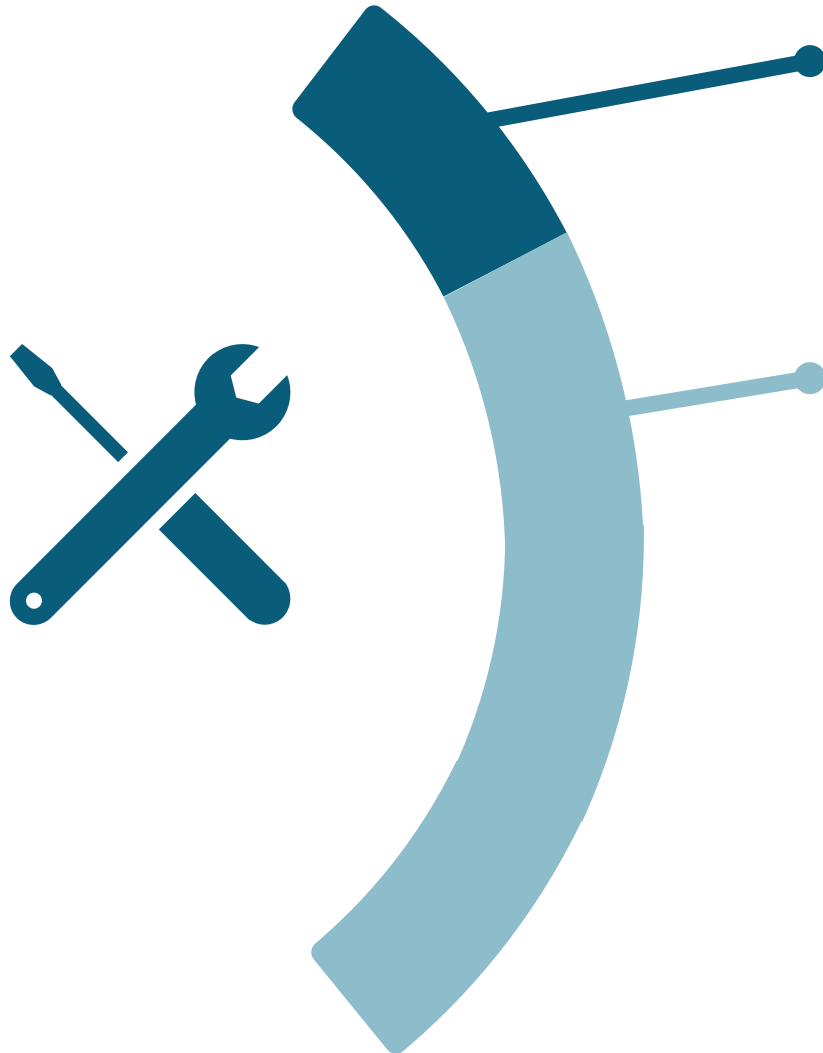
Phone surveys are the best approach for obtaining a sufficient sample, in order to provide insights that can be relied on. These phone calls are made by fixed fieldwork partners, located in the respective countries.

... 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 Q4 theme topic



Surveying the Services in the installation sector...

This quarter we investigated the topic of services in the installation sector, by asking installers which services (in addition to the usual installation work) they offer to their customers (e.g. advice, remote monitoring, and troubleshooting, etc.) and which services installers would like to receive from manufacturers.

...helps to understand the needs of installers in their work

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

- Services offered by installers
- Services installers would like to receive from manufacturers:
 - Commercial
 - Engineering
 - Products & installations
 - Repair & maintenance

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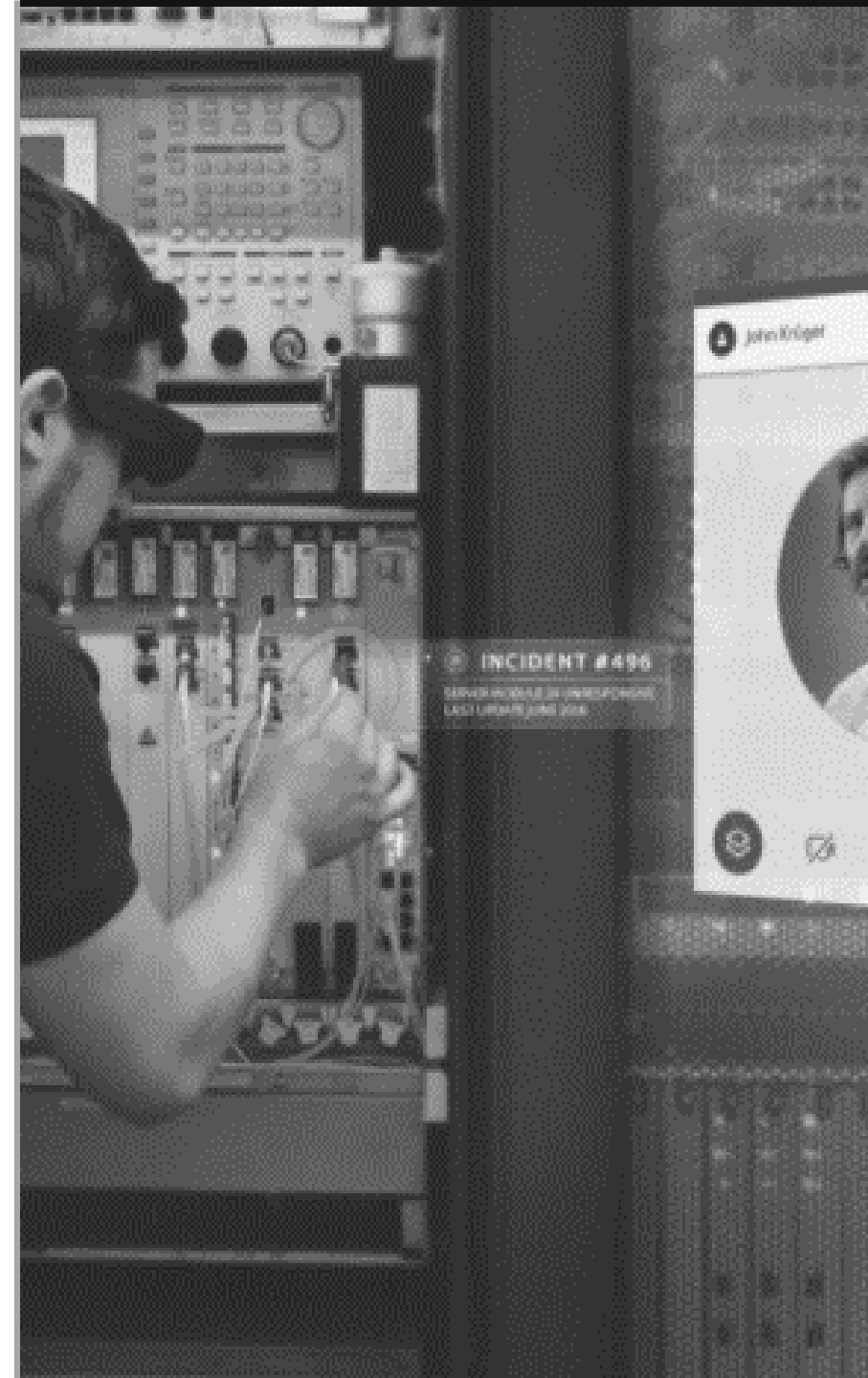
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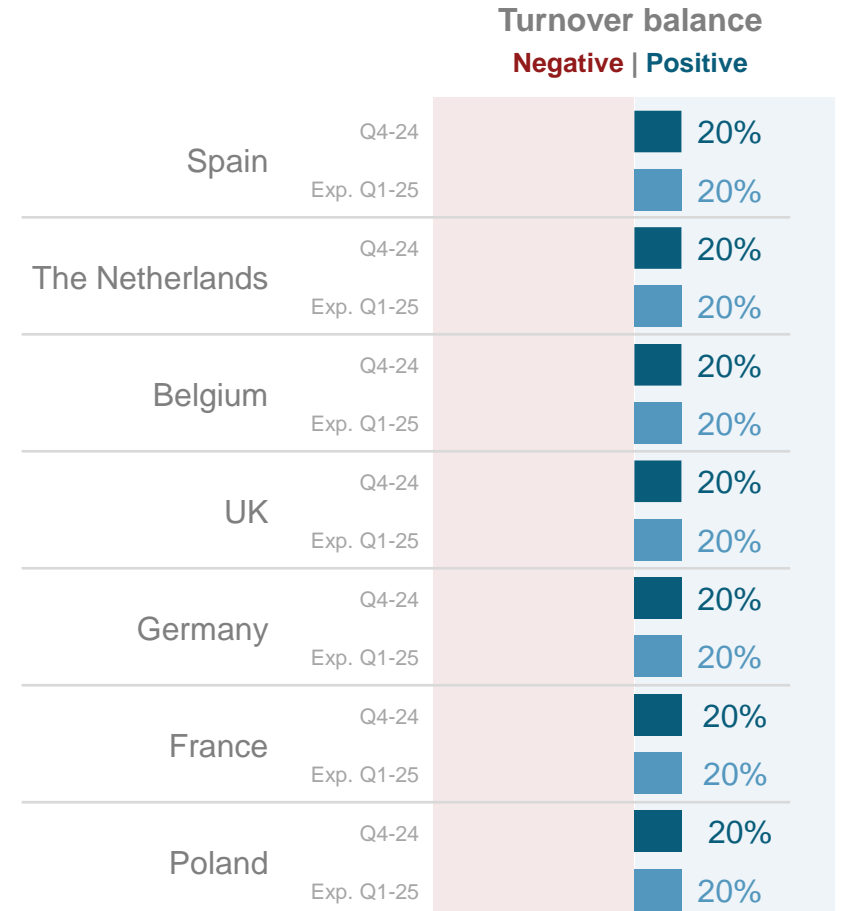
DUMMY DATA



Business Development

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Key takeaways

DUMMY DATA



2 Services in the installation sector

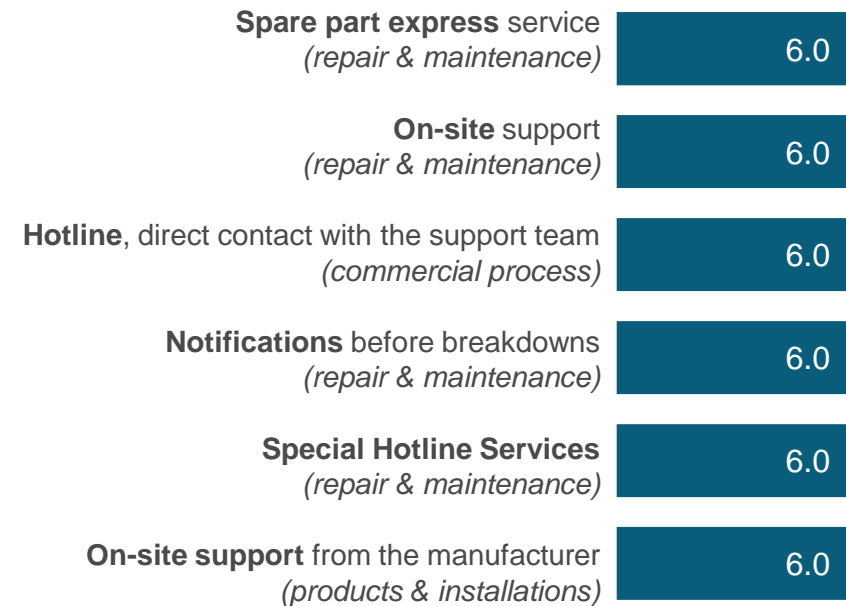
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Top 5 services installers want to receive from manufacturers



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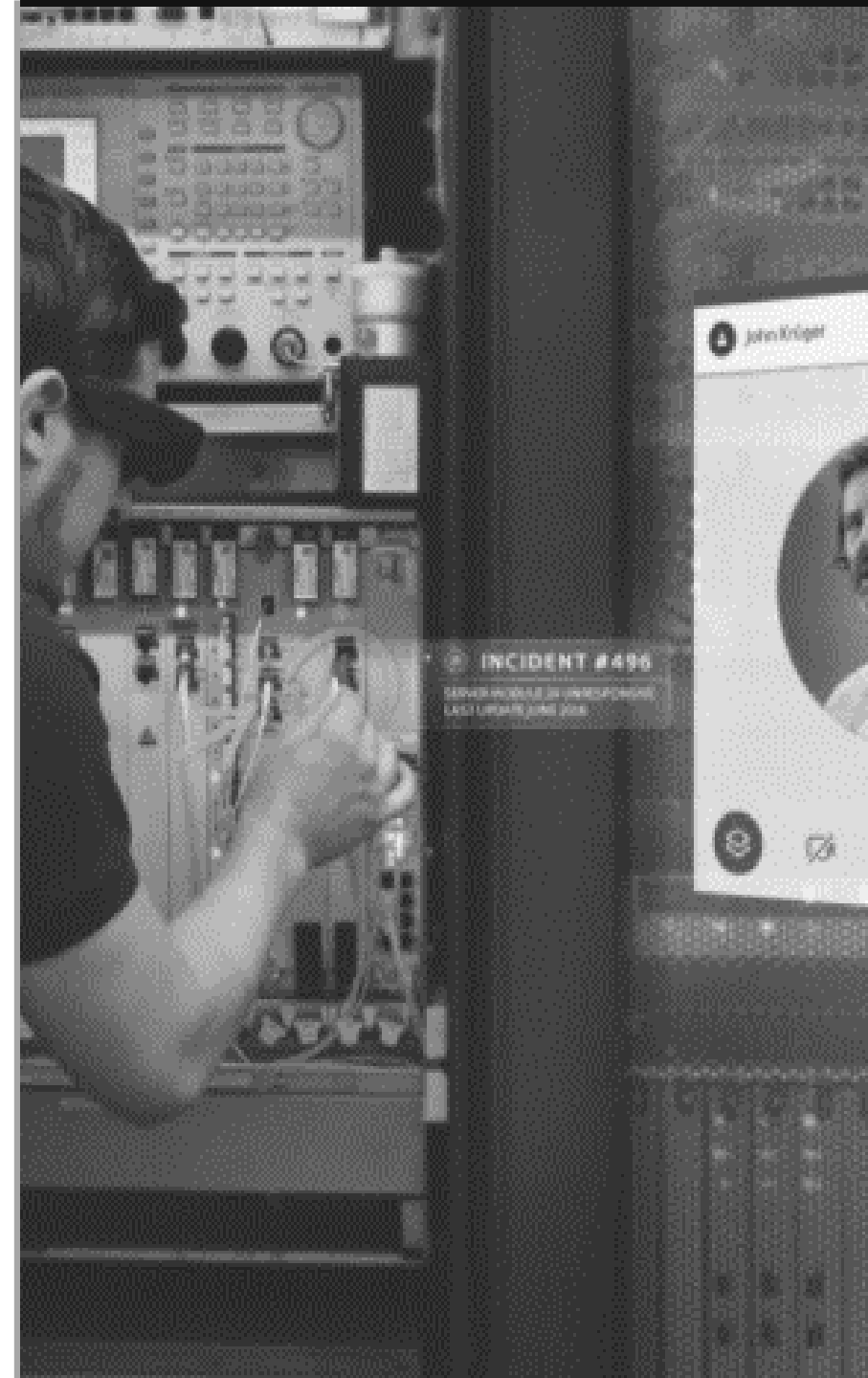
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DUMMY DATA

Electrical installation **activities** installers are involved in [Q4 2024]

Q: Does your company do the following activities?

	UK	Germany	France	Poland	Belgium	Netherlands	Spain
Electrical enclosures/ switch boxes	70%	70%	70%	70%	70%	70%	70%
Lighting and luminaries	70%	70%	70%	70%	70%	70%	70%
EV charging stations	70%	70%	70%	70%	70%	70%	70%
Home automation	70%	70%	70%	70%	70%	70%	70%
Solar/ PV-panels	70%	70%	70%	70%	70%	70%	70%
Battery storage	70%	70%	70%	70%	70%	70%	70%
Solar collectors	70%	70%	70%	70%	70%	70%	70%

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DUMMY DATA

Turnover distribution per **project type** in [Q4 2024]

[New build](#) | [Renovation](#) | Maintenance (planned/ ad-hoc)

	UK			Germany			France			Poland			Belgium			Netherlands			Spain		
Total	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%
1-4 FTE	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%
5-14 FTE	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%
15 and more FTE	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%

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DUMMY DATA

Turnover distribution per **segment** in [Q4 2024]

Residential | Commercial | Industrial | Infrastructural

	UK			Germany			France			Poland			Belgium			Netherlands			Spain		
Total	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%
1-4 FTE	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%
5-14 FTE	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%
15 and more FTE	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%	34%	33%	33%

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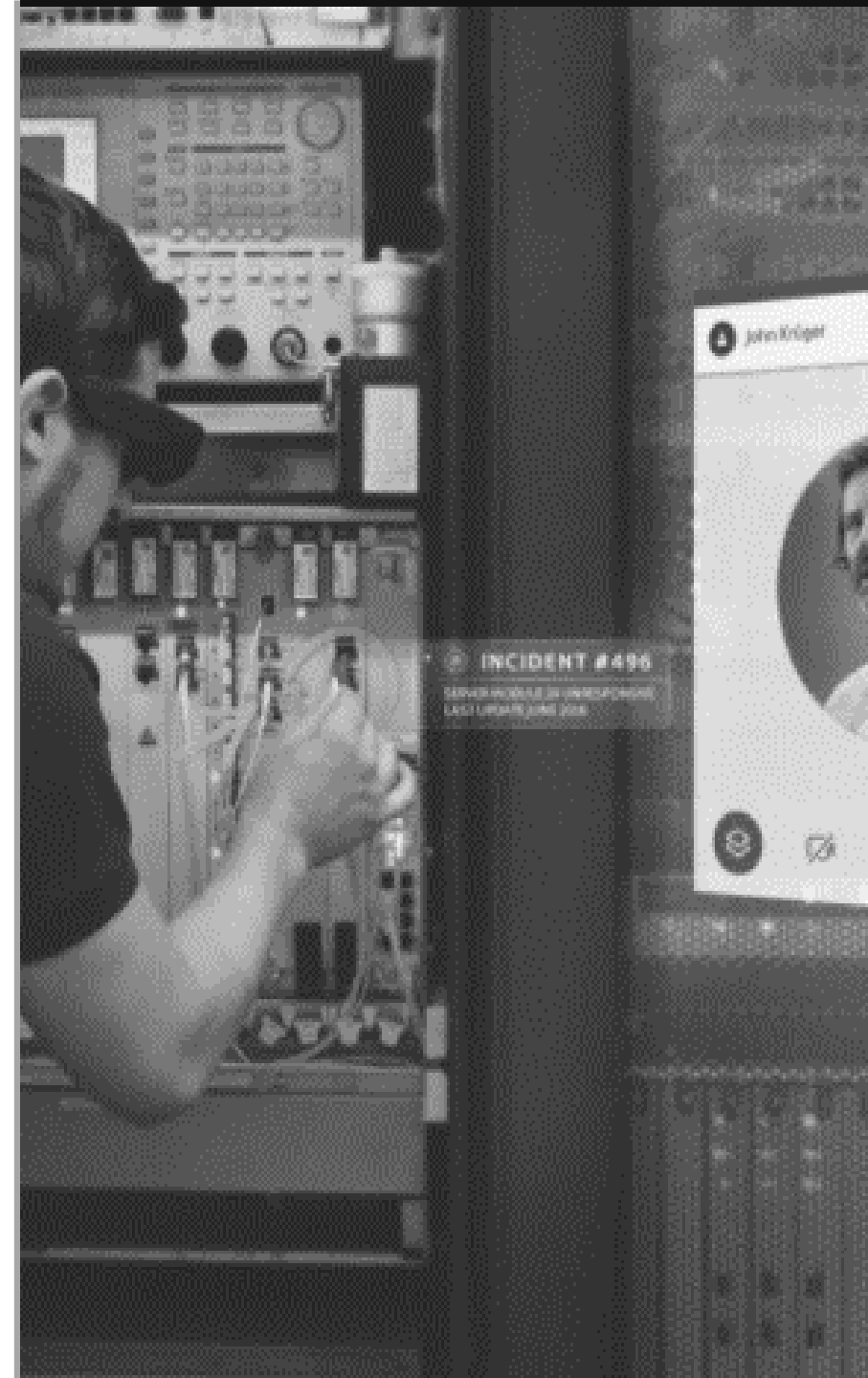
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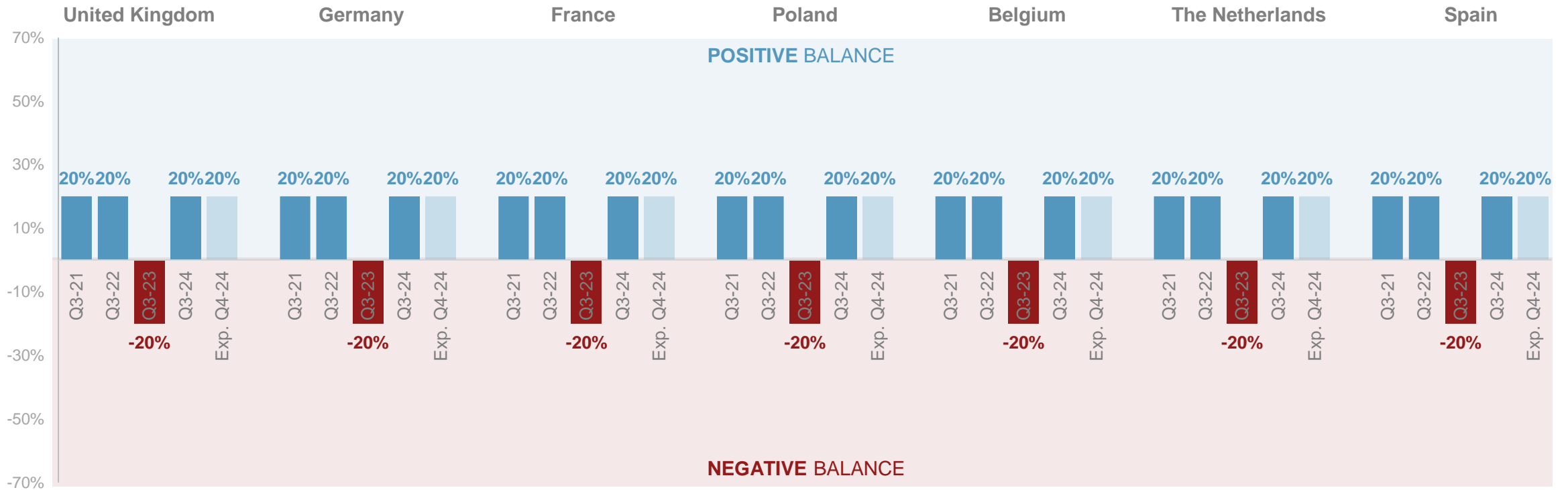
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DUMMY DATA

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)



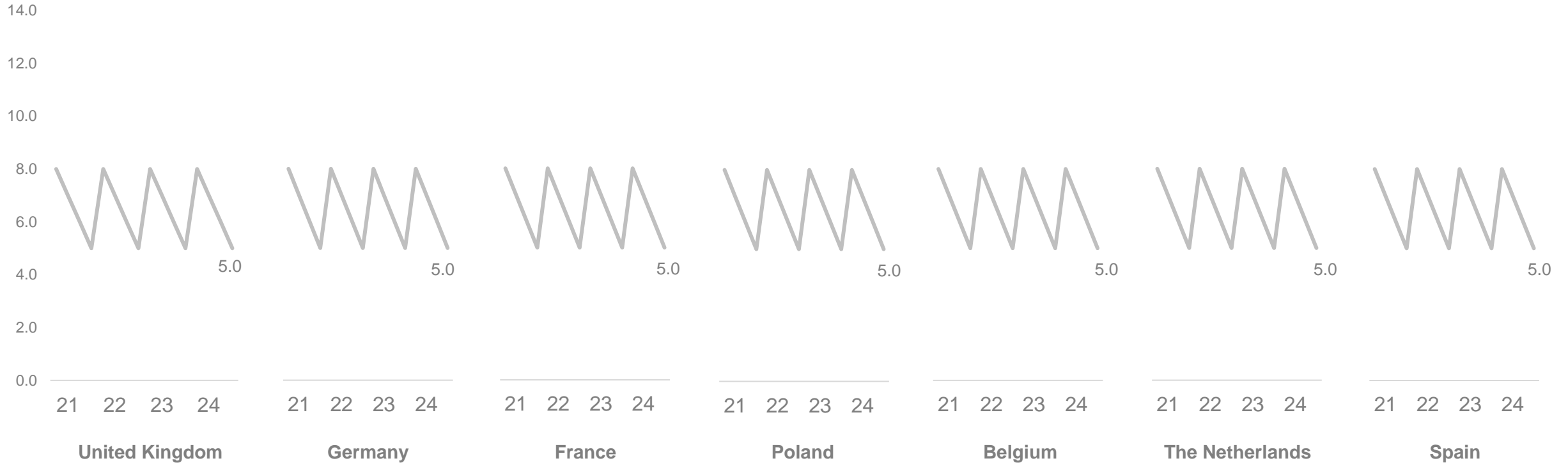
Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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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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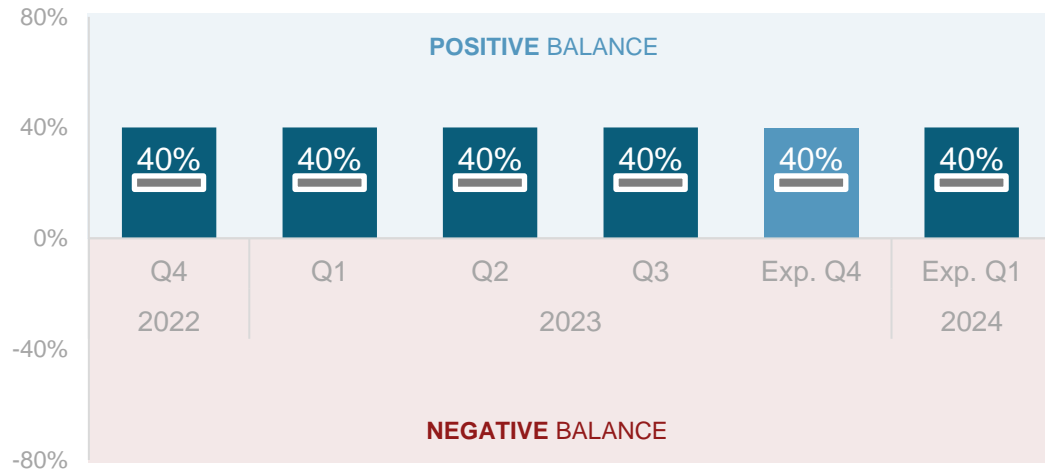
DUMMY DATA

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



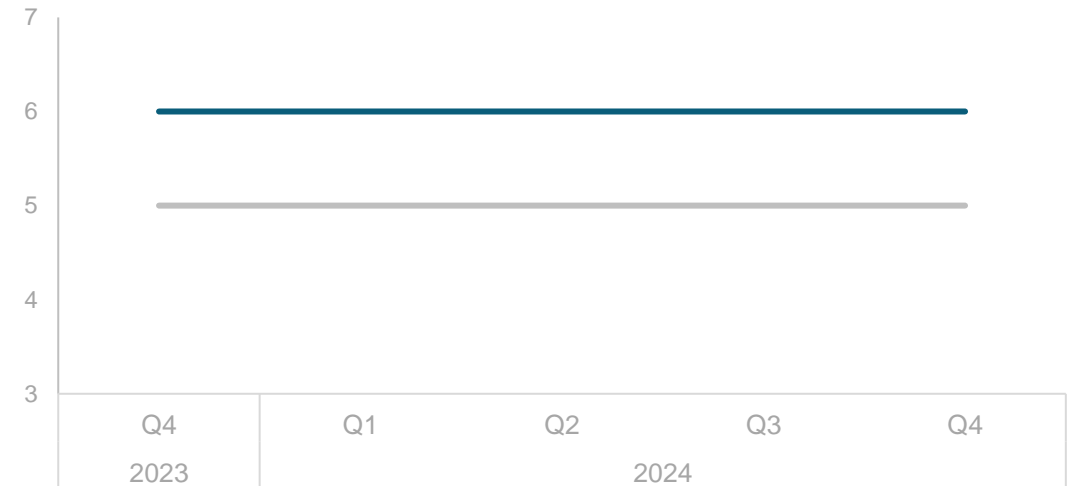
Detailed information regarding the turnover distribution can be found in the [appendix](#).

Order book portfolio

Q: How big is your current order book portfolio?

ORDER BOOK (MONTHS)

EU | THE UNITED KINGDOM



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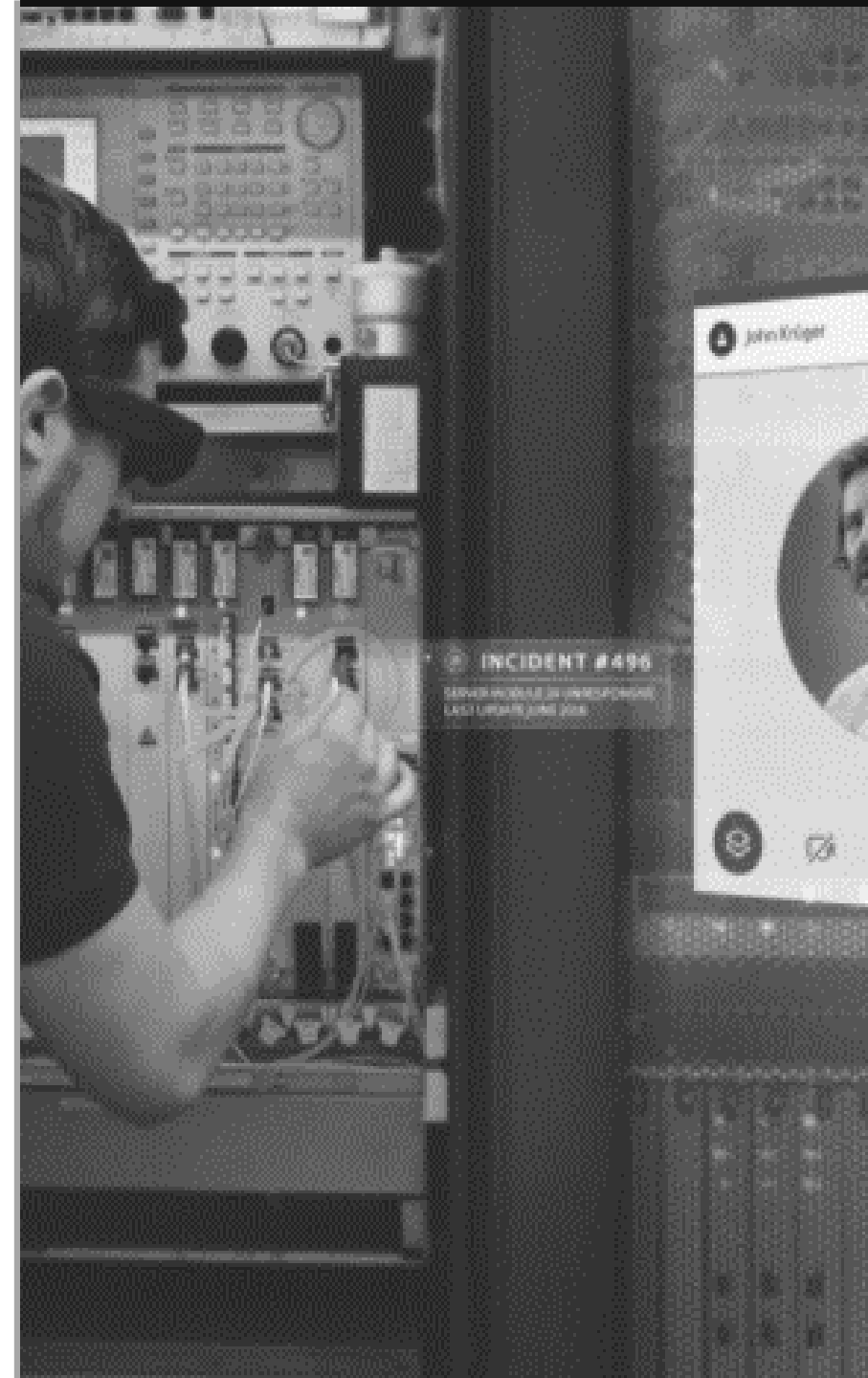
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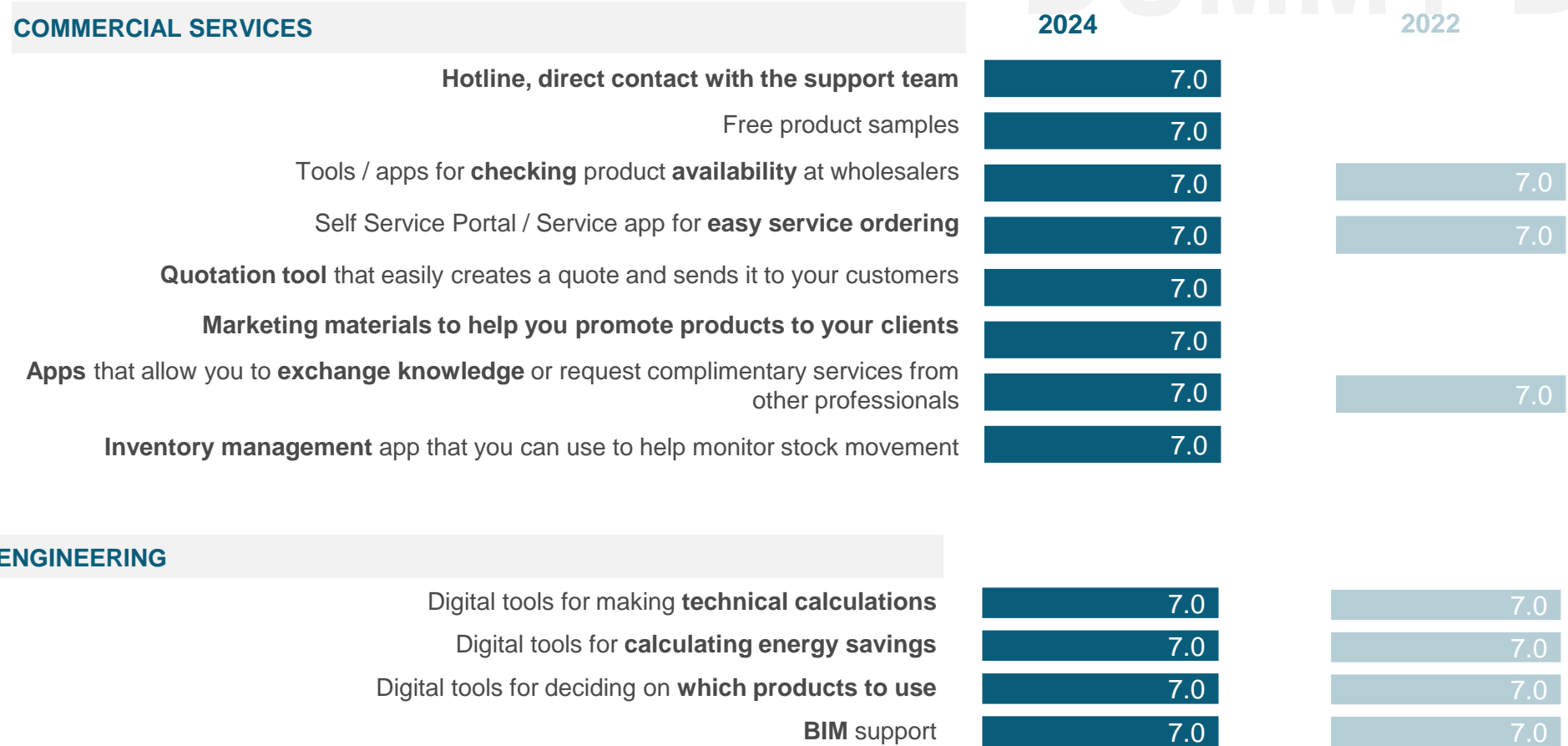


Interest in services from manufacturers

Question: Which of the following services would you like to receive from manufacturers of installation products?

[Scale of 1 (no interest) – 10 (high interest)]

DUMMY DATA



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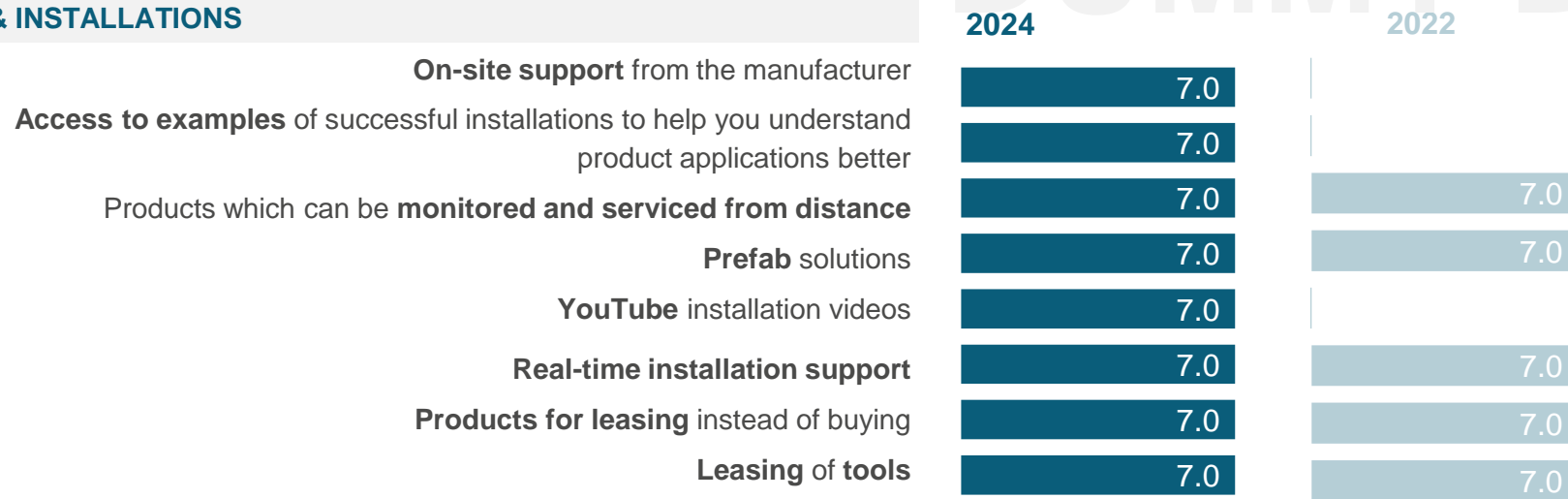
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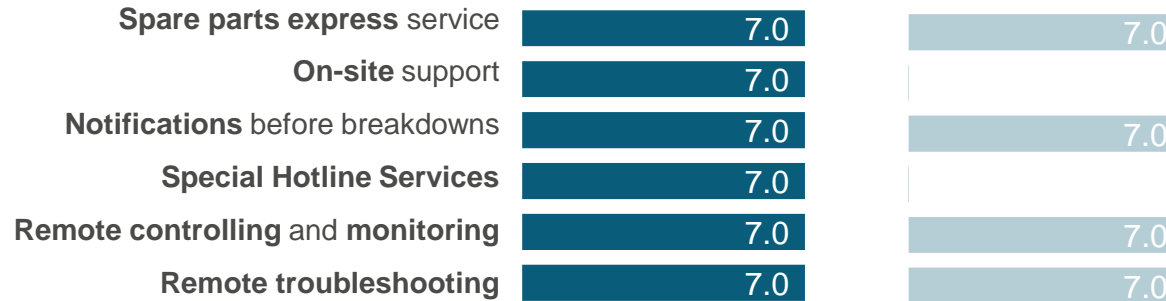
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PRODUCTS & INSTALLATIONS



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REPAIR & MAINTENANCE



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DUMMY DATA

Most wanted service that installers would like to receive from manufacturers,

(average on a scale of 1-no interest to 10-high interest)

The United Kingdom

2024: On-site support for repair and maintenance (7.0)
2022: Real time installation support (7.0)

The Netherlands

2024: Hotline, direct contact with the support team during the commercial process (7.0)
2022: Tools / apps for checking product availability at wholesalers (7.0)

Belgium

2024: Spare parts express service (7.0)
2022: Spare parts express service (7.0)

Poland

2024: Spare parts express service (7.0)
2022: Spare parts express service (7.0)

France

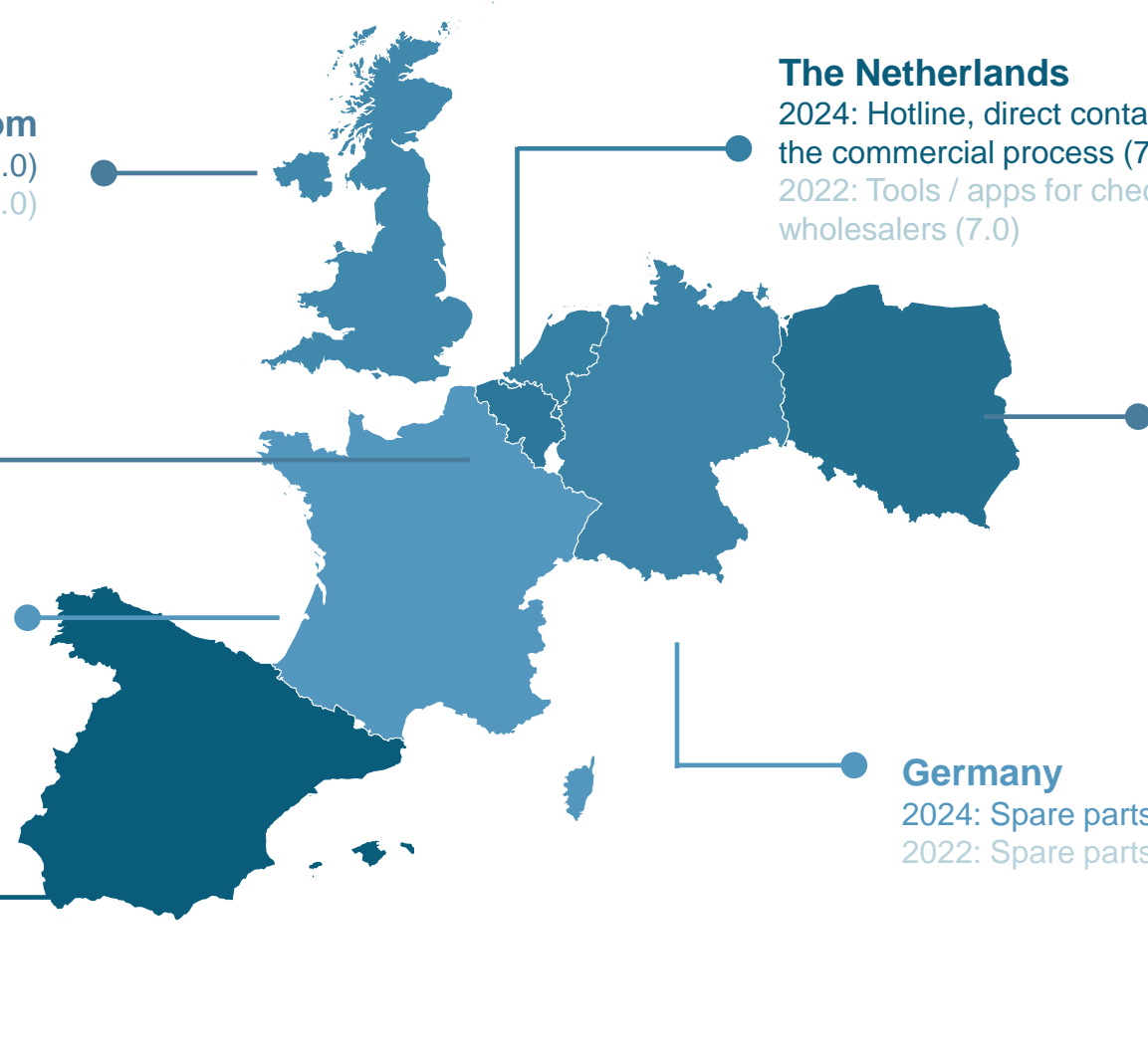
2024: Hotline, direct contact with the support team during the commercial process (7.0)
2022: Tools / apps for checking product availability at wholesalers (7.0)

Germany

2024: Spare parts express service (7.0)
2022: Spare parts express service (7.0)

Spain

2024: Hotline, direct contact with the support team during the commercial process (7.0)
2020: Spare parts express service (7.0)

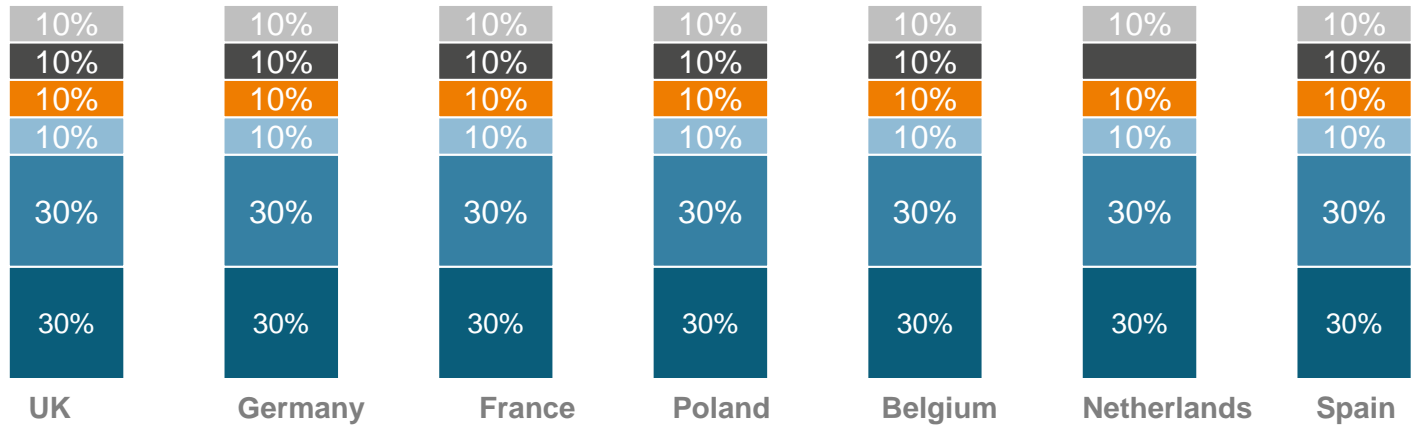


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DUMMY DATA

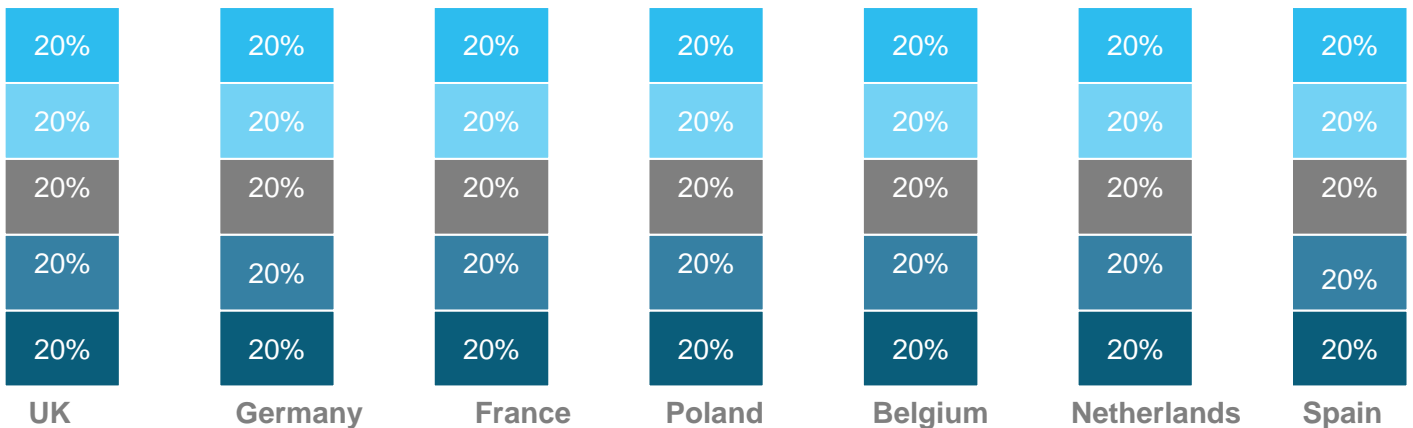
Preferred methods for quick support on-site

Calling customer support | Using online manuals | Searching for answers online | Using a chat-based system | Figure it out on my own | Other | Don't know



Likelihood to pay for additional or faster support service

Very likely | Likely | Neutral | Unlikely | Very unlikely | Don't know



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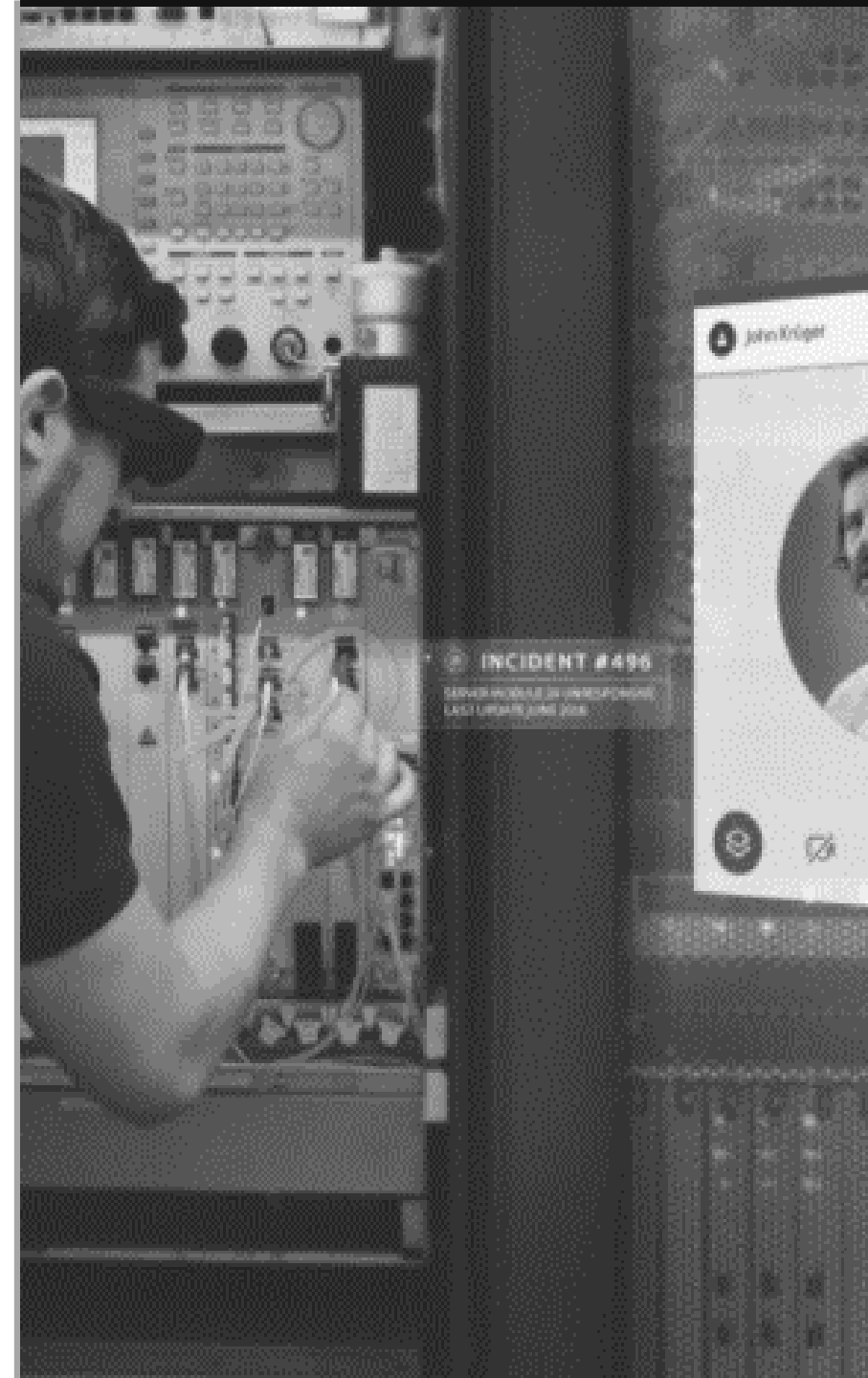
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Interest in services from manufacturers 1/2

Question: Which of the following services would you like to receive from manufacturers of installation products?

[Scale of 1 (no interest) – 10 (high interest)]

DUMMY DATA

	2024	2022
COMMERCIAL SERVICES		
Hotline, direct contact with the support team	7.0	
Free product samples	7.0	
Apps for checking product availability at wholesalers	7.0	7.0
Quotation tool that easily creates a quote and sends it to your customers	7.0	
Marketing materials to help you promote products to your clients	7.0	
Self Service Portal/ Service APP for easy service ordering	7.0	7.0
Apps that allow you to exchange knowledge	7.0	7.0
Inventory management app that you can use for monitoring	7.0	
ENGINEERING		
Digital tools for making technical calculations	7.0	7.0
Digital tools for calculating energy savings	7.0	7.0
Digital tools for deciding which products to use	7.0	7.0
BIM support	7.0	7.0

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Top-1 per **company** size:

Small: Hotline, direct contact with the support team

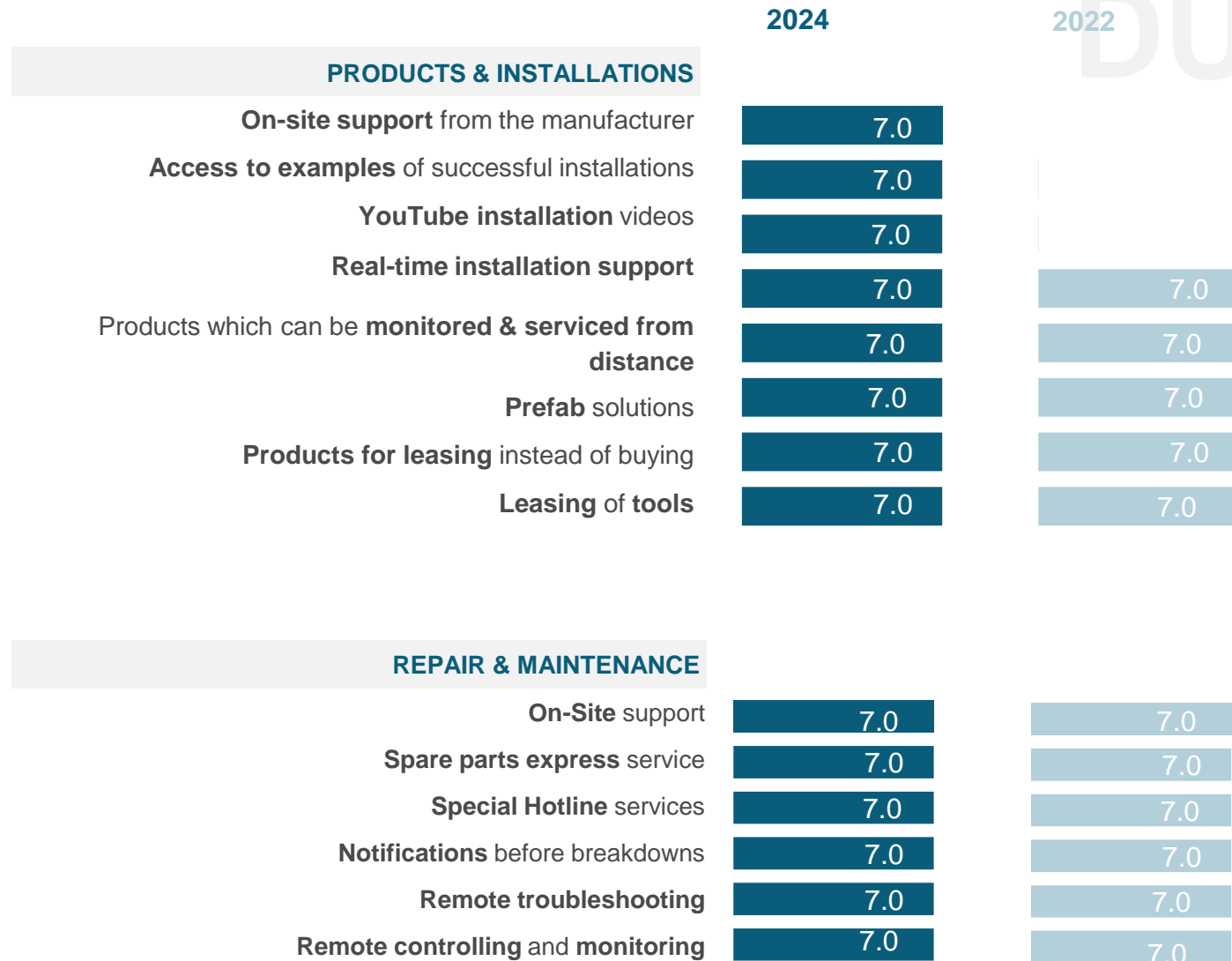
Medium: On-site support

Big: Spare parts express service

Interest in services from manufacturers 2/2

Question: Which of the following services would you like to receive from manufacturers of installation products?

[Scale of 1 (no interest) – 10 (high interest)]



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DUMMY DATA

Interest in services from manufacturers related to the **COMMERCIAL process**

Question: Which of the following services would you like to receive from manufacturers of installation products?

[Scale of 1 (no interest) – 10 (high interest)]

		Interest in services per company size		
		1-4 FTE	5-14 FTE	15+ FTE
Hotline , direct contact with the support team	7.0	7.0	7.0	7.0
Free product samples	7.0	7.0	7.0	7.0
Apps for checking product availability at wholesalers	7.0	7.0	7.0	7.0
Quotation tool that easily creates a quote and sends it to your customers	7.0	7.0	7.0	7.0
Marketing materials to help you promote products to your clients	7.0	7.0	7.0	7.0
Self Service Portal/ Service APP for easy service ordering	7.0	7.0	7.0	7.0
Apps that allow you to exchange knowledge	7.0	7.0	7.0	7.0
Inventory management app that you can use to help monitor stock movement	7.0	7.0	7.0	7.0

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DUMMY DATA

DIGITAL CALCULATION TOOLS: Cable calculations are indicated as being the most helpful.

Interest in services from manufacturers related to **ENGINEERING**

Question: Which of the following services would you like to receive from manufacturers of installation products?

[Scale of 1 (no interest) – 10 (high interest)]

Interest in services per company size

		1-4 FTE	5-14 FTE	15+ FTE
Digital tools for making technical calculations	7.0	7.0	7.0	7.0
Digital tools for calculating energy savings	7.0	7.0	7.0	7.0
Digital tools for deciding on which products to use	7.0	7.0	7.0	7.0
BIM support	7.0	7.0	7.0	7.0

Question: What kind of digital calculation tools would be most helpful for you? [Top 5]

Cable calculations	25%
Lighting calculation tools	25%
Load calculation for electrical systems	25%
Solar Panel, Battery Bank, and Inverter Sizing	25%
Voltage drop calculations	25%

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DUMMY DATA

Interest in services from manufacturers related to PRODUCTS & INSTALLATIONS

Question: Which of the following services would you like to receive from manufacturers of installation products?

[Scale of 1 (no interest) – 10 (high interest)]

	Overall Interest	Interest in services per company size		
		1-4 FTE	5-14 FTE	15+ FTE
On-site support from the manufacturer	7.0	7.0	7.0	7.0
Access to examples of successful installations	7.0	7.0	7.0	7.0
YouTube installation videos	7.0	7.0	7.0	7.0
Real-time installation support	7.0	7.0	7.0	7.0
Products which can be monitored and serviced from distance	7.0	7.0	7.0	7.0
Prefab solutions	7.0	7.0	7.0	7.0
Products for leasing instead of buying	7.0	7.0	7.0	7.0
Leasing of tools	7.0	7.0	7.0	7.0

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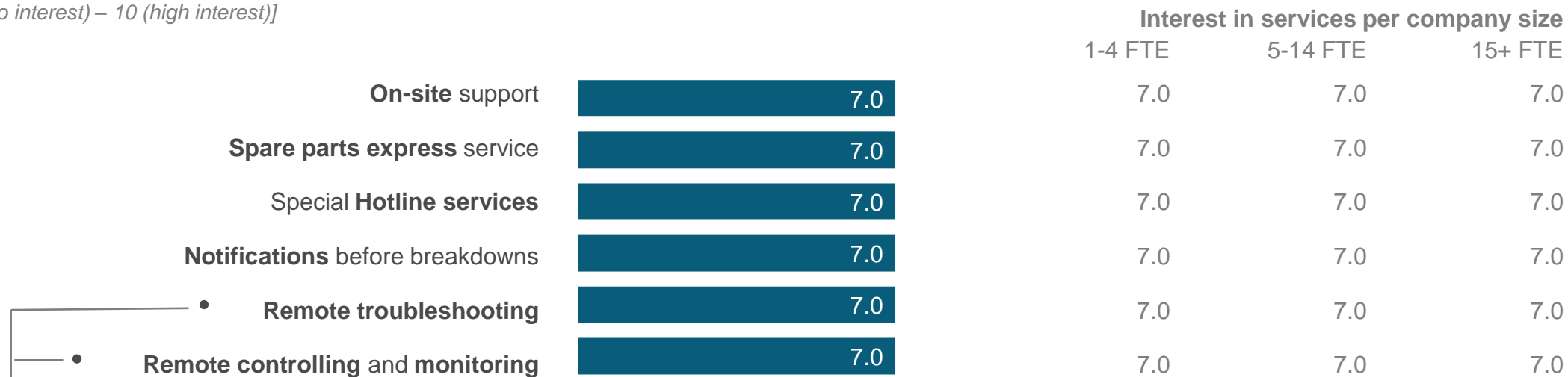
DUMMY DATA

REMOTE MONITORING & TROUBLESHOOTING: The most relevant for **EV chargers**.

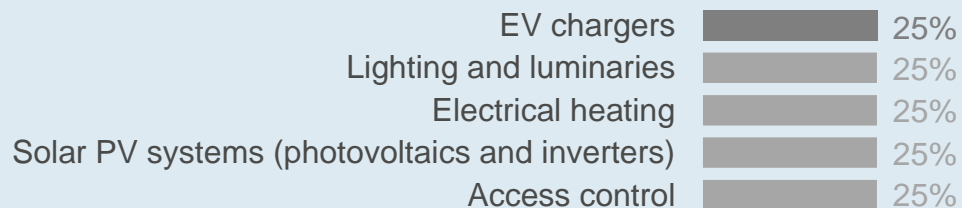
Interest in services from manufacturers related to **REPAIR & MAINTENANCE**

Question: Which of the following services would you like to receive from manufacturers of installation products?

[Scale of 1 (no interest) – 10 (high interest)]



Question: For which electrical products would remote monitoring and troubleshooting be relevant? [Top 5]



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DUMMY DATA

Preferred methods for quick support on-site

Question: When you are working on-site and need quick support, what is your preferred method for getting help

Calling customer support | **Using online manuals** | **Searching for answers online** | **Usually figure it out on my own** | **Other**



Base: n= 125, asked to all the respondent

Likelihood to pay for additional or faster support service

Question: Thinking about your work overall, how likely are you to pay for additional or faster support services from the manufacturer during peak times?

Very likely | **likely** | **Neutral** | **Unlikely** | **Very unlikely** | **Don't know**



Base: n= 125, asked to all the respondent

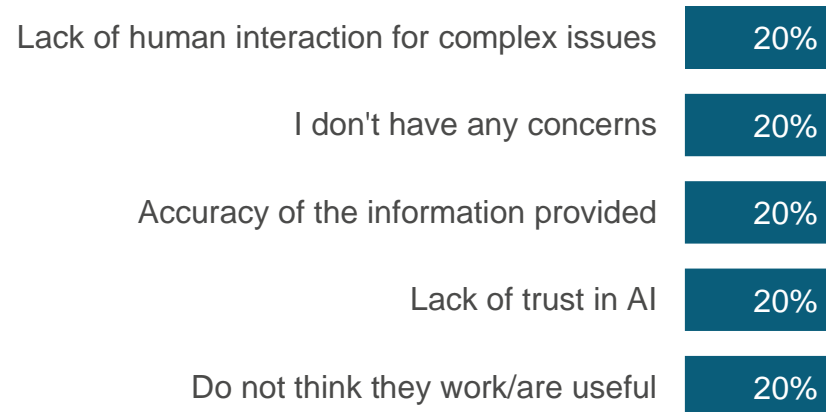
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DUMMY DATA

Concerns on using AI chatbot for technical support

Question: What concerns would you have about using an AI chatbot for technical support? [Top 5]



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Respondents' background characteristics

DUMMY DATA

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?

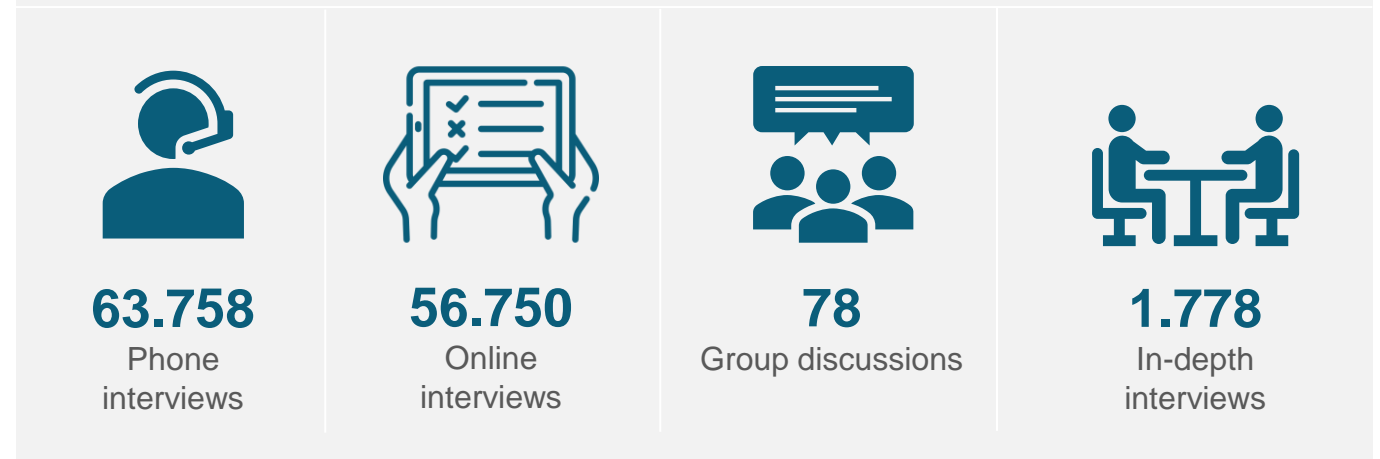
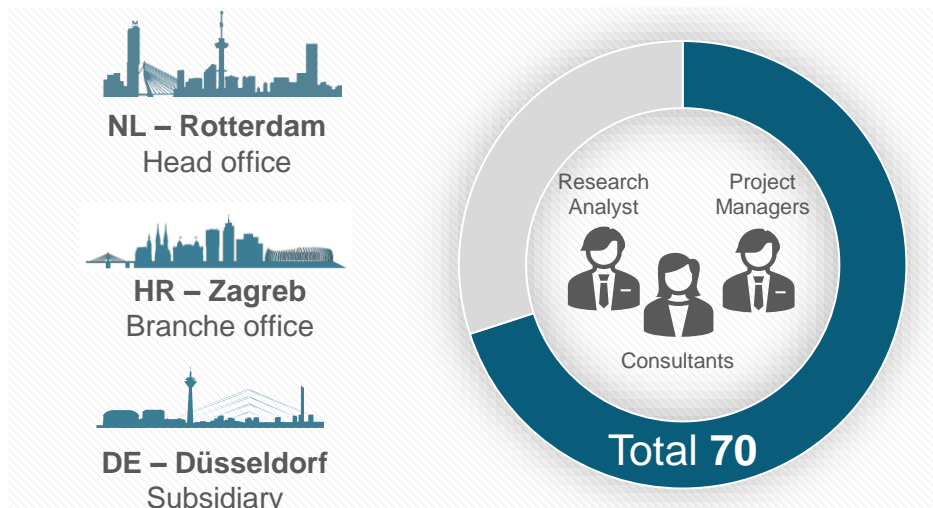
	UK	Germany	France	Poland	Belgium	Netherlands	Spain
Owner / director / manager	50%	50%	50%	50%	50%	50%	50%
Project manager	50%	50%	50%	50%	50%	50%	50%
Engineer / designer	50%	50%	50%	50%	50%	50%	50%
Installer	50%	50%	50%	50%	50%	50%	50%
Calculator / work planner	50%	50%	50%	50%	50%	50%	50%
Purchaser	50%	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%

Q4 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.






























































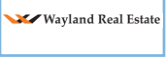




































Multi-client monitors of USP Marketing Consultancy

	European Architectural Barometer	European Contractor Monitor	European Mechanical installation monitor	European Electrical Installation Monitor	European Painter insight Monitor	European Home Improvement Monitor
Target group	Architects	Contractors	HVAC installers	Electrical installers	Professional painters	Consumers
Methodology	Phone interviews	Phone interviews	Phone interviews	Phone interviews	Phone interviews	Online interviews
Interviews per time	100-125 per country	100-125 per country	100-125 per country	100-125 per country	150-250 per country	600 per country
Countries	<ul style="list-style-type: none"> Germany United Kingdom France The Netherlands Belgium Poland Spain Italy 	<ul style="list-style-type: none"> Germany United Kingdom France The Netherlands Belgium Poland Spain Italy 	<ul style="list-style-type: none"> Germany United Kingdom France The Netherlands Belgium Poland 	<ul style="list-style-type: none"> Germany United Kingdom France The Netherlands Belgium Poland Spain 	<ul style="list-style-type: none"> Germany United Kingdom France The Netherlands Belgium Poland Spain Italy Denmark Sweden 	<ul style="list-style-type: none"> Germany United Kingdom France The Netherlands Belgium Poland Spain Italy Denmark Sweden Austria
Frequency	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly
Themes 2022	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
Target group	Handyman	Consumers	Consumers	Construction, installation, real estate
Methodology	Phone interviews	Online interviews	Online interviews	Online interviews
Interviews per time	200 per country	800 per country	3.600	600
Countries	<ul style="list-style-type: none"> • Germany • United Kingdom • France • The Netherlands • Poland • Spain • Italy 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • The Netherlands • Belgium • Poland • Sweden • Austria 	<ul style="list-style-type: none"> • The Netherlands 	<ul style="list-style-type: none"> • The Netherlands
Frequency	Quarterly	Annually	Annually	Quarterly
Themes 2022	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
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  
  	  	  	  

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