European Mechanical Installation Monitor Q4 2024

Media orientation and consumption

February 2025

A category report by USP Marketing Consultancy

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European Mechanical Installation Monitor

Gain valuable insights into the European mechanical installation market with our quarterly analysis. Conducted through 650 detailed phone interviews with registered HVAC installers and plumbers across six key European markets, our research captures the latest trends and behaviours driving the industry.

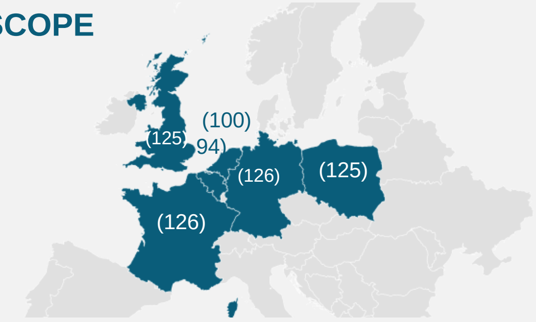
Discover Industry Insights

Our research provides a comprehensive overview of the European mechanical installation market, featuring:

- **Fixed Part:** Economic developments of installation companies in Europe, including order book and turnover trends.
- **Quarterly Themes for 2024:**
    - Q1: Building Information Modelling (BIM)
    - Q2: Smart and Connected Products
    - Q3: Prefabrication (Prefab)
    - **Q4: Media Orientation**

Stay ahead of the curve with data-driven insights and in-depth analysis tailored to your business needs.

COUNTRY SCOPE



THE TIMELINE

Report Q1	Report Q2	Report Q3	Report Q4
May 2024	August 2024	November 2024	February 2025

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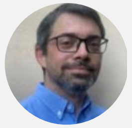

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About **target group** & **methodology**

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 which 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 typically most interviews are 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 Q4 theme topic**

Surveying media orientation and usage…

This quarter, we investigated the topic of media orientation and usage by asking installers about their usual media orientation behaviour.

Nowadays, with more and more different types of media channels, it is important for manufacturers to know how to reach their clients – the installers. Next to ‘old school’ information sources like magazines, trade shows and representatives, social media channels and apps are gaining ground and have claimed their position in the area of information technology.

In this report, insights will be given about to what extent different types of information sources are used by installers, what kind of information installers are looking for and prefer, the usage of social media and smart phones among installers etc.

…helps manufacturers to fine-tune their marketing campaigns and use the most efficient channels

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

- Different types of information sources used by installers
- What kind of information are installers looking for
- The usage of social media and the different social media channels
- Usage of apps

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Business Development:
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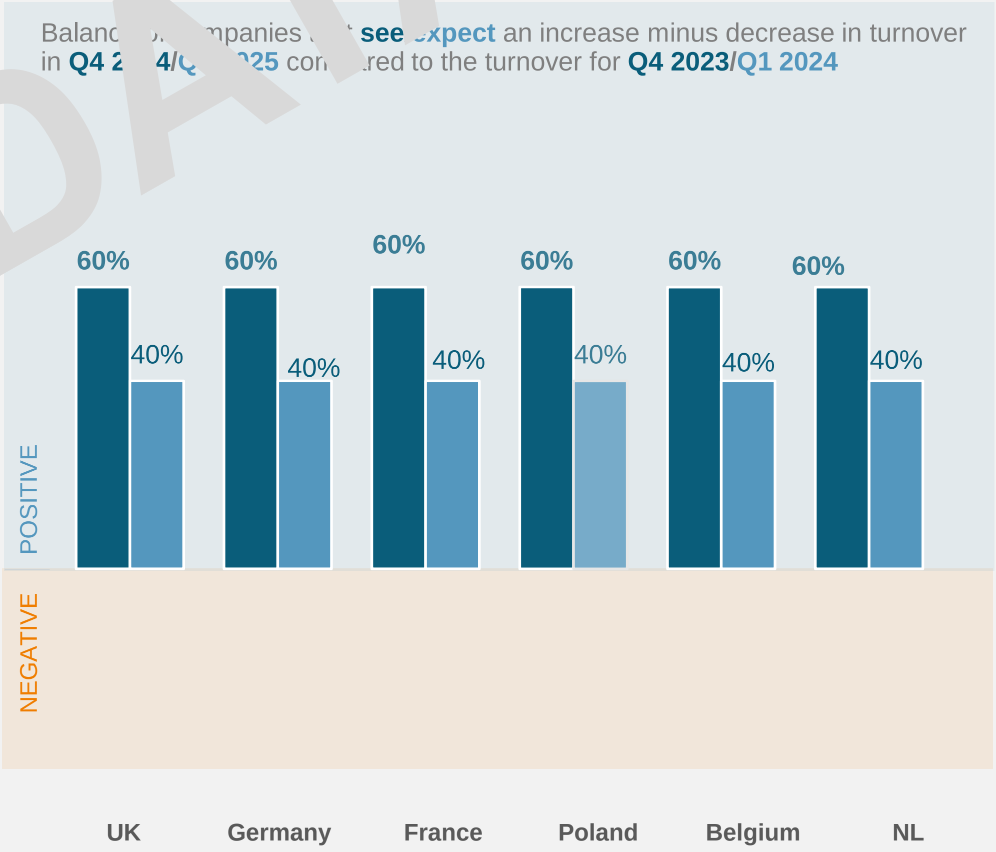
Turnover balance of installers Q4 2024 and Q1 2025



Media Orientation and Consumption:

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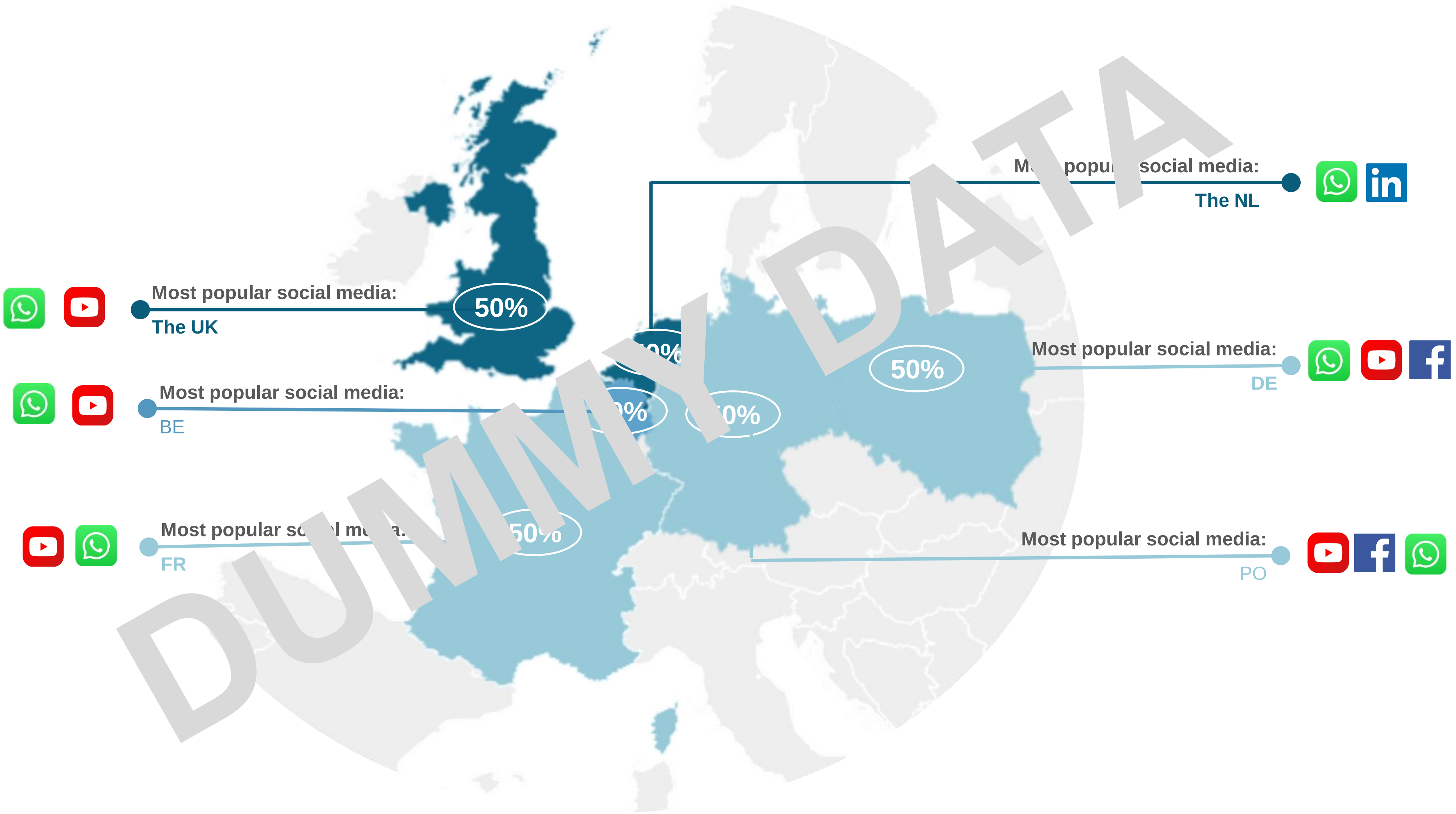
Usage of some Social Media channels for professional purposes

	UK	Germany	France	Poland	Belgium	NL
WhatsApp	20%	20%	20%	20%	20%	20%
LinkedIn	20%	20%	20%	20%	20%	20%
Facebook	20%	20%	20%	20%	20%	20%
YouTube	20%	20%	20%	20%	20%	20%
Instagram	20%	20%	20%	20%	20%	20%

Social media usage for professional purposes in the 6 countries:



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Core HVAC activities

Which of the following installation activities does your company perform?

	UK	Germany	France	Poland	Belgium	Netherlands
Sample size	125	125	125	100	100	100
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%
Heat pumps	50%	50%	50%	50%	50%	50%
Ventilation	50%	50%	50%	50%	50%	50%
Air conditioning and cooling	50%	50%	50%	50%	[illegible]	50%

Other installation activities

	UK	Germany	France	Poland	Belgium	Netherlands
Sample size	[illegible]	125	125	100	100	100
Solar cells, 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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Core HVAC activities

Which of the following installation activities does your company perform?

	Total	Per company size: 1-4 FTE	5-14 FTE	15+ FTE
Heating installations	40%	33%	34%	[illegible]
Hot/cold water installation	40%	[illegible]	[illegible]	[illegible]
Sanitary ware installation	40%	[illegible]	[illegible]	33%
Ventilation	[illegible]	33%	34%	33%
Heat pumps	40%	33%	34%	33%
Air conditioning/cooling	40%	33%	34%	33%

Other installation activities

	Total	Per company size: 1-4 FTE	5-14 FTE	15+ FTE
Electrical installation	40%	33%	34%	33%
Home automation installation	40%	33%	34%	33%
Solar cells, solar collectors	40%	33%	34%	33%

Base, all installers

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Research questions **Business development**

THE METHODOLOGY TO PREDICT FUTURE BUILING VOLUMES

USP uses a model based on eleven market indicators and USPs own results. The model combines information about the economy, like construction requests and confidence figures, with data about the developments within architects' experience, such as changes in the turnover and the number of active architects. Only information that proved to have a strong correlative value on the building volume is used. Subsequently, every kind of data is weighed based on the predictive value. More information can be found in the appendix

THE RESEARCH QUESTIONS

- *If you compare your turnover of Q4-24 to Q4-23, how did your turnover develop?*
- *What are your expectations for the development in Q1-25?*
- *How big is your current order book portfolio? For how many months will you be able to keep your current staff working?*
- *How many new projects has your company scored/ been commissioned in Q3 2024?*
- *How many projects have been postponed in Q3 2024? In Q3 2024, how many projects were not started and cancelled?*

(125)

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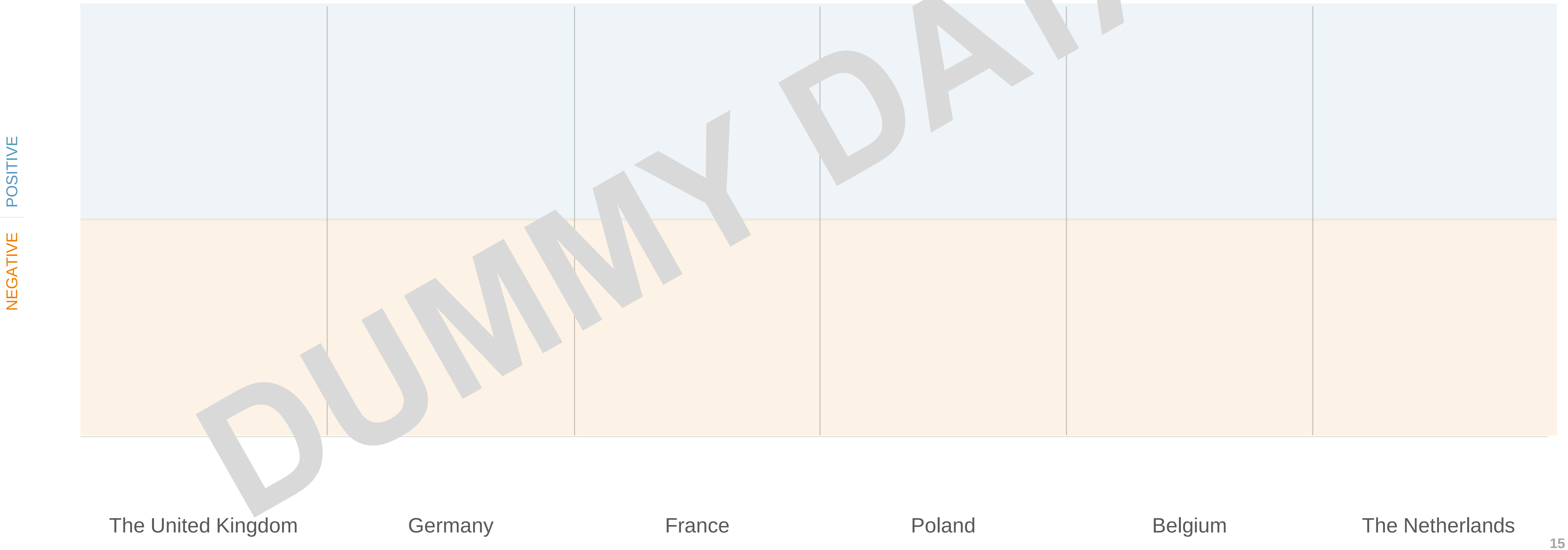
Turnover outlook last quarters and expectations for Q1 2025

Q: If you compare your turnover of Q4-24 to Q4-23, how did your turnover develop? | What are your expectations for the development in Q1-25?

TURNOVER BALANCE = (% INCREASE minus % DECREASE)

COMPARISON SAME QUARTER LAST YEAR



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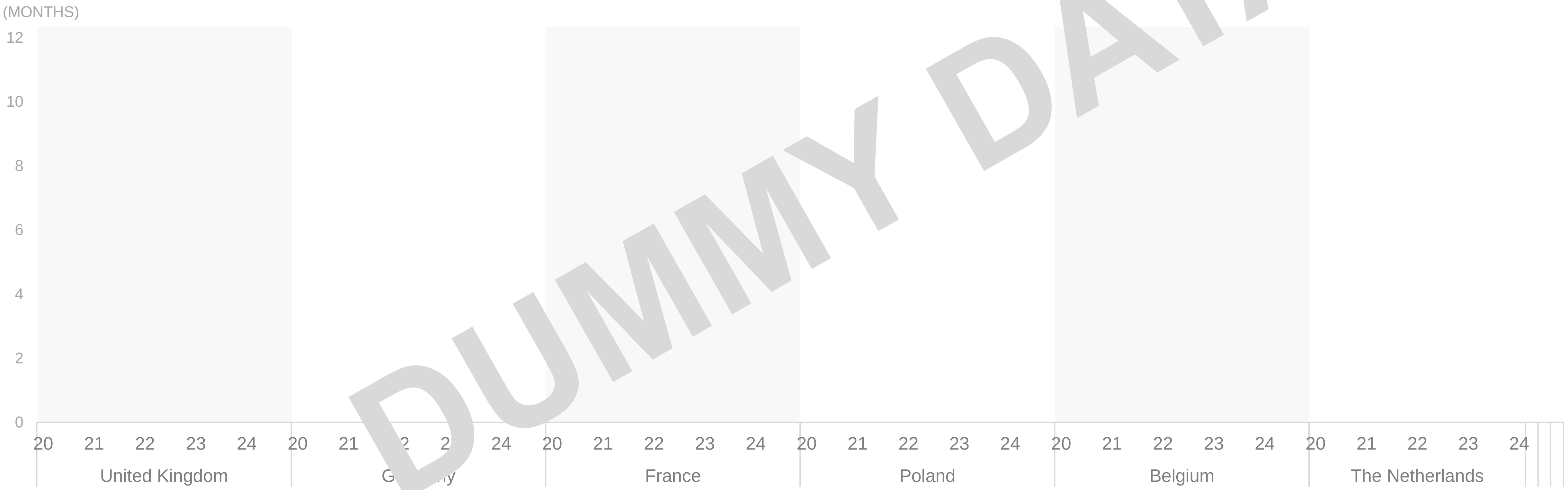
Order book portfolio

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



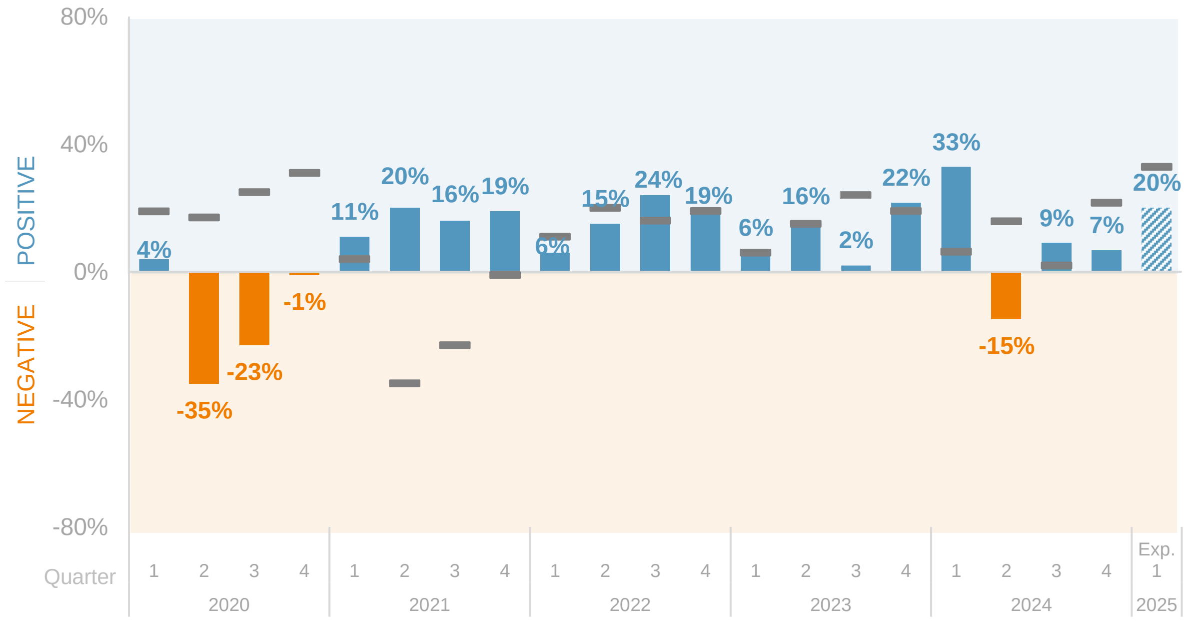
The turnover balance of the Belgian installers is positive in Q4-24 but lower than in Q4-23. The slightly growing order books positively affect the expectations for the next quarter.

Turnover outlook

Q: If you compare your turnover of Q4-24 to Q4-23, how did your turnover develop? | What are your expectations for the development in Q1-25?

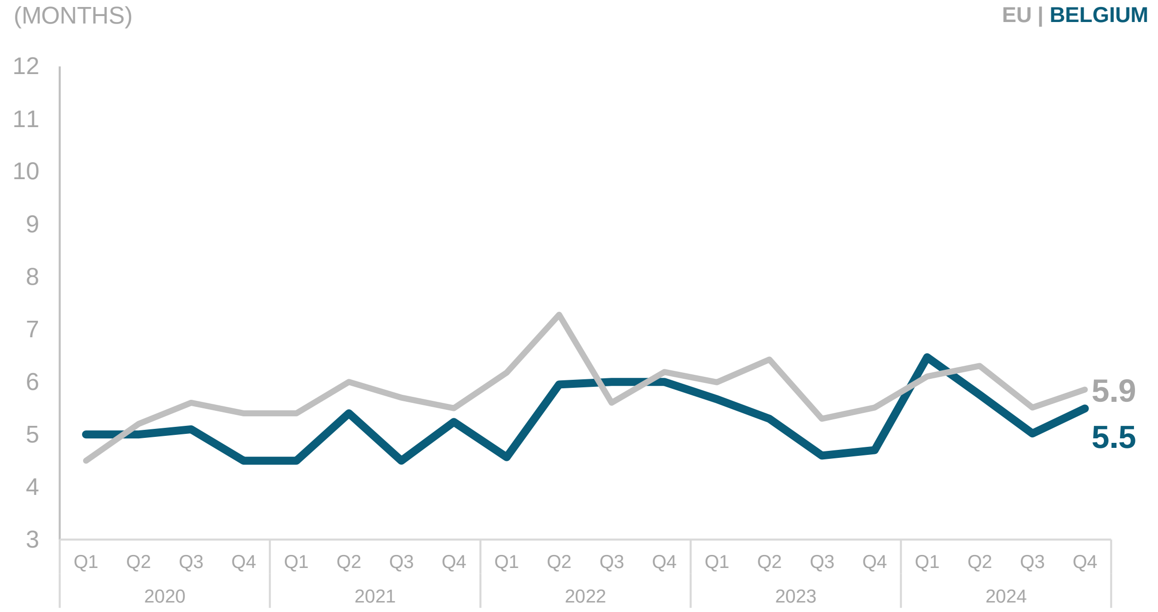
TURNOVER BALANCE = (% INCREASE minus % DECREASE)

COMPARISON SAME QUARTER LAST YEAR



Order book portfolio

Q: How big is your current order book portfolio?



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Number of projects in Q4 2024

How many new projects has your company scored/ been commissioned in Q3 2024? How many projects have been postponed in Q3 2024? In Q3 2024, how many projects were not started and cancelled?

		UK		Germany		France		Poland		Belgium		The Netherlands	
		Share of companies	Avg. # of projects	Share of companies	Avg. # of projects	Share of companies	Avg. # of projects	Share of companies	Avg. # of projects	Share of companies	Avg. # of projects	Share of companies	Avg. # of projects
New projects	Q4-24	50%	10	50%	10	50%	10	50%	10	50%	10	50%	10
	Q3-24	50%	10	50%	10	[illegible]	10	50%	10	50%	10	50%	10
	Q2-24	50%	10	50%	10	[illegible]	[illegible]	50%	10	50%	10	50%	10
	Q1-24	50%	10	50%	10	[illegible]	10	50%	10	50%	10	50%	10
Postponed projects	Q4-24	50%	10	50%	[illegible]	50%	10	50%	10	50%	10	50%	10
	Q3-24	50%	[illegible]	50%	10	50%	10	50%	10	50%	10	50%	10
	Q2-24	50%	10	[illegible]	10	50%	10	50%	10	50%	10	50%	10
	Q1-24	50%	10	50%	10	50%	10	50%	10	50%	10	50%	10
Cancelled projects	Q4-24	50%	10	50%	10	50%	10	50%	10	50%	10	50%	10
	Q3-24	50%	10	50%	10	50%	10	50%	10	50%	10	50%	10
	Q2-24	50%	10	50%	10	50%	10	50%	10	50%	10	50%	10
	Q1-24	50%	10	50%	10	50%	10	50%	10	50%	10	50%	10

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Research questions **THEME topic part of this study (DMU)**

WHY DMY AS KEY TRENDS TOPIC

The installation market is changing. Trends in the market impact the role of the installer as well as the services and products they offer. It is essential to monitor the role of the installer while many leading brands of products applied in buildings and installation have a pull strategy wherein the installer plays an important role.

THE RESEARCH QUESTIONS

- *In what degree do you use each of the following information sources in your work, for choosing products and brands you will use. Let's start with the traditional information sources.*
- *In what degree do you use each of the following types of personal contacts in your work, for choosing products and brands you will use.*
- *In what degree do you use each of the following digital media sources in your work, for choosing products and brands you will use.*
- *In what degree do you use each of the following Social media information sources in your work - for example when, choosing products or looking for help for usage of products and brands you will use.*
- *Of the information sources you use, which are for you the most useful/helpful ones?*
- *What is your main source of information when you are in the field, for example at the construction or service site?*
- *Which professional magazines do you read?*
- *When/ in what cases do you appreciate if a representative of the manufacturer contacts you?*
- *Do you expect to be visiting trade shows in the coming 2 years?*
- *Which trade shows do you expect to visit in the coming 2 years?*
- *Could you please name the websites you visit when you search for information about products and brands?*
- *Would you like to have the Chatbot function/ online chat assistant/ on the manufacturer's website?*
- *Which of the following social media do you make use for professional purpose? In what degree do you use each of the following types of personal contacts in your work, for choosing products and brands you will use.*
- *In what situation do you use Social media for professional purpose?*
- *Do you use WhatsApp to communicate with manufacturers, for example with the service team, sales reps, etc.?*
- *Do you use WhatsApp to communicate with wholesalers, for example with the service team, sales people, etc.?*
- *Do you use Apps for professional purpose?*
- *Can you mention which Apps do you use on a regular basis for professional purpose?*
- *What do you use the Apps for?*
- *Do you listen to the radio while you are at work, and if yes, which 2 radio stations do you listen to most of the time?*

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The number of readers of professional magazines/newspapers and printed product documentation has decreased in four countries. Manufacturer’s magazines are a stable traditional media in the majority of markets.

Media sources in 2024 and the development in comparison to 2022

QC2: To what degree do you use each of the following information sources in your work, for choosing products and brands? [the shares present the sum of answers: very often + often + sometimes]

TRADITIONAL MEDIA	Average	UK	Germany	France	Poland	Belgium	Netherlands
Sample size: N=	702	125	126	125	125	101	100
Printed product documentation	58%	**51%**	**76%**	**63%**	**51%**	56%	**45%**
Manufacturer magazines	41%	**37%**	41%	58%	**33%**	37%	**38%**
Professional magazines/ newspapers	**29%**	**33%**	**19%**	28%	26%	**26%**	**45%**
Radio	**45%**	**42%**	**41%**	25%	47%	56%	64%

Marked numbers: orange = decrease in usage of >5% in comparison to 2022 | blue = increase in usage of <5% in comparison to 2022

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Media sources in 2024 and the development in comparison to 2022

Q: To what degree do you use each of the following information sources in your work, for choosing products and brands? [the shares present the sum of answers: very often + often + sometimes]

PERSONAL MEDIA	**Average**	UK	Germany	France	Poland	Belgium	Netherlands
Sample size: N=	675	125	125	125	100	100	100
Personal contact with manufacturer's representatives	50%	50%	50%	50%	50%	50%	50%
Advice from wholesaler	50%	50%	50%	50%	50%	50%	50%
Events at the wholesaler site	50%	50%	50%	50%	50%	50%	50%
Visiting of events organised by manufacturers	50%	50%	50%	50%	50%	50%	50%
Visiting trade shows	50%	50%	50%	50%	50%	50%	50%

Marked numbers: orange = decrease in usage of >5% in comparison to 2022 | blue = increase in usage of <5% in comparison to 2022

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Media sources in 2024 and the development in comparison to 2022

Q: To what degree do you use each of the following information sources in your work, for choosing products and brands? [the shares present the sum of answers: [illegible] + often + [illegible]

DIGITAL MEDIA	Average	UK	Germany	France	Poland	Belgium	Netherlands
Sample size: N=	675	125	125	[illegible]	100	100	100
Searching on the Internet	50%	50%	[illegible]	[illegible]	50%	50%	50%
Manufacturers' websites	50%	50%	50%	50%	50%	50%	50%
Wholesalers' websites	50%	[illegible]	[illegible]	50%	50%	50%	50%
Digital product documentation	50%	[illegible]	50%	50%	50%	50%	50%
Manufacturers' newsletters	[illegible]	[illegible]	50%	50%	50%	50%	50%
Wholesalers’ newsletters	[illegible]	50%	50%	50%	50%	50%	50%
Manufacturers’ apps	[illegible]	50%	50%	50%	50%	50%	50%
Wholesalers' apps	50%	50%	50%	50%	50%	50%	50%
Online calculation and design tools from manufacturers	50%	50%	50%	50%	50%	50%	50%
AI chat software (ChatGPT, Copilot etc.)	50%	50%	50%	50%	50%	50%	50%

Marked numbers: orange = decrease in usage of >5% in comparison to 2022 | blue = increase in usage of <5% in comparison to 2022

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Media sources in 2024 and the development in comparison to 2022

Q: To what degree do you use each of the following information sources in your work, for choosing products and brands? [the shares present the sum of answers: very often + often + sometimes]

SOCIAL MEDIA	Average	UK	Germany	France	Poland	Belgium	Netherlands
Sample size: N=	675	125	125	25	100	100	100
Specialised professional forums	50%	50%	50%	50%	50%	50%	50%
YouTube	50%	50%	50%	50%	50%	50%	50%
Personal network sites (Facebook etc.)	50%	50%	50%	50%	50%	50%	50%
Business network sites (LinkedIn, Xing etc.)	50%	[illegible]	50%	50%	50%	50%	50%
Other social media (TikTok, Pinterest etc.)	50%	50%	50%	50%	50%	50%	50%
Messenger apps (WhatsApp, Viber, etc.)	50%	50%	50%	50%	50%	50%	50%
Craftsman Influencers on social media	50%	50%	50%	50%	50%	50%	50%
Instagram	50%	50%	50%	50%	50%	50%	50%

Marked numbers: orange = decrease in usage of >5% in comparison to 2022 | blue = increase in usage of <5% in comparison to 2022

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Media sources in 2024: traditional and personal media

Q: To what degree do you use each of the following information sources in your work, for choosing products and brands? [the shares present the sum of answers: very often + often + sometimes]

		2024	2022	2020
TRADITIONAL MEDIA	Printed product documentation	50%	50%	50%
	Manufacturer magazines	50%	50%	50%
	Professional magazines/ newspapers	50%	50%	50%
	Radio	50%	50%	50%
PERSONAL MEDIA	Advice from wholesaler	50%	50%	50%
	Personal contact with manufacturer's representatives	50%	50%	50%
	Events at the wholesaler site	50%	50%	50%
	Visiting of events organised by manufacturers	50%	50%	50%
	Visiting trade shows	50%	50%	50%

Base, all installers: N (2024)= XXX, N (2022)= XXX, N (2020)= XXX

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Media sources in 2024: digital and social media

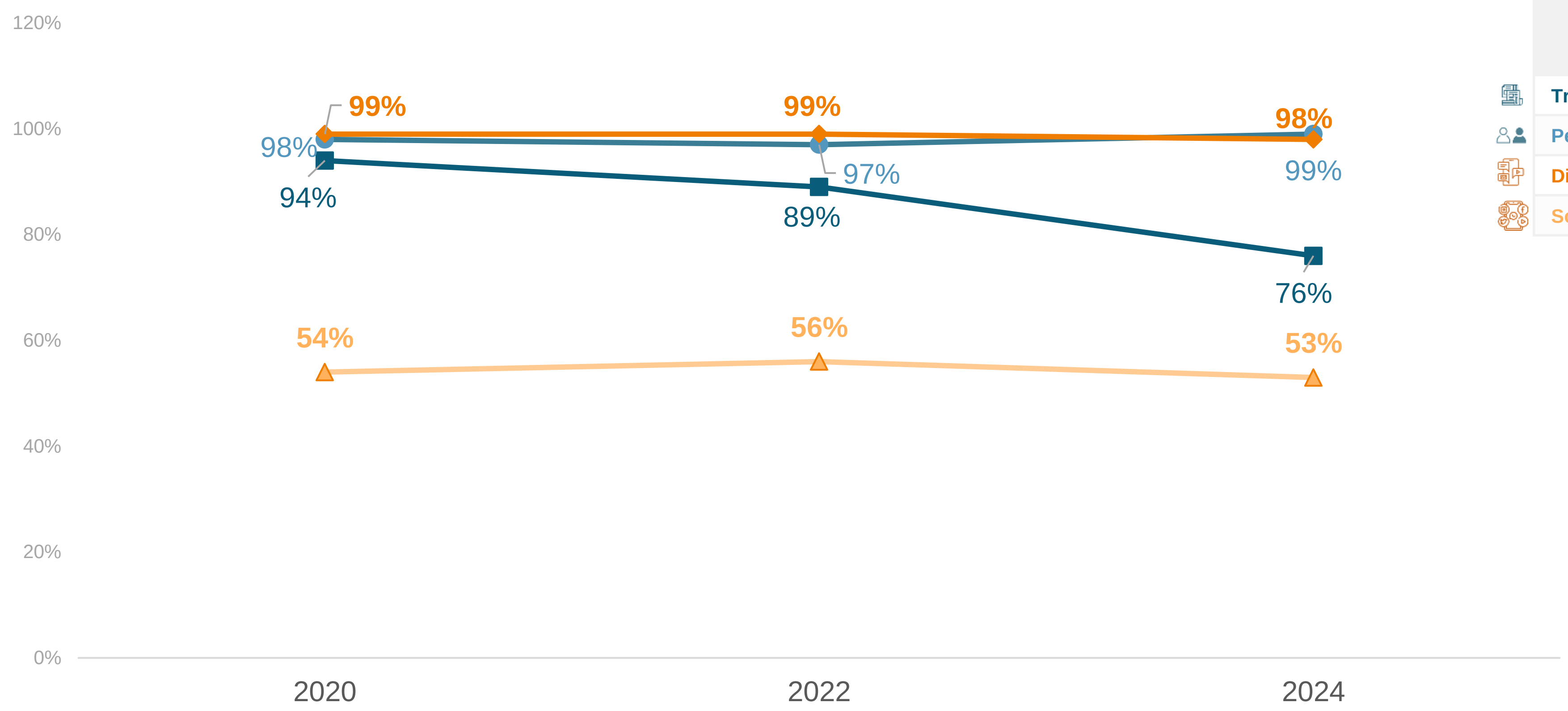
Q: To what degree do you use each of the following information sources in your work, for choosing products and brands? [the shares present the sum of answers: very often + often + sometimes]

		2024	2022	2020
DIGITAL MEDIA	Searching on the Internet	50%	50%	50%
	Manufacturers' websites	50%	50%	50%
	Wholesalers' websites	50%	50%	50%
	Digital product documentation	50%	50%	50%
	Online calculation and design tools from manufacturers	50%	50%	50%
	Manufacturers' newsletter	50%	50%	50%
	Manufacturers' apps	50%	50%	50%
	Wholesalers' newsletter	50%	50%	50%
	Wholesalers' apps	50%	50%	50%
	AI chat software (ChatGPT, Copilot etc.)	50%	n/a	n/a
SOCIAL MEDIA	YouTube	50%	50%	50%
	Specialised professional forums	50%	50%	50%
	Business network sites (LinkedIn, Xing etc.)	50%	50%	50%
	Personal network sites (Facebook etc.)	50%	50%	50%
	Other social media (TikTok, Pinterest etc.)	50%	n/a	n/a
	Messenger apps (WhatsApp, Viber etc.)	50%	n/a	n/a
	Craftsman Influencers on social media	50%	n/a	n/a
	Instagram	50%	50%	50%

Base, all installers; N (2024)= XXX, N (2022)= XXX, N (2020)= XXX

Belgian installers value personal, digital, and social media, which is confirmed with the same usage level as over past years. Interest in traditional media significantly dropped in that same period.

Trend development of using different types of media



	The number of media investigated for a specific type of media*		
	2020	2022	2024
Traditional media	4	4	4
Personal media	5	5	5
Digital media	9	9	10
Social media	6	7	8

Base, all installers: N (2024)= 101, N (2022)= 94, N (2020)= 100| * The number of media investigated in each year for a specific type of media has also contributed to a usage share presented on the chart (the more media channels are investigated, the higher likelihood for using a specific type of media).

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Top5 most useful information sources

Q: Of the information sources you use, which are for you the most useful/ helpful ones?

	Total	Per company size: 1-4 FTE	5-14 FTE	15+ FTE
Searching on the Internet	30%	33%	34%	[illegible]
Manufacturers' websites	30%	33%	34%	[illegible]
Manufacturers' representatives	30%	[illegible]	34%	33%
Wholesaler's advice	30%	33%	34%	33%
YouTube	30%	33%	34%	33%

Base, all installers

Top5 sources of information when on the job site

Q: What is your main source of information when you are in the field, for example at the construction or service site? Please also let us know if you do not go into the field.

	Total	Per company size: 1-4 FTE	5-14 FTE	15+ FTE
Online search (Google, Bing, etc.)	30%	33%	34%	33%
Manufacturer's technical hotline	30%	33%	34%	33%
Online documentation	30%	33%	34%	33%
Printed materials	30%	33%	34%	33%
Colleagues	30%	33%	34%	33%

Base, randomly selected from all installers

USP

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Using traditional information sources

Q: To what degree do you use the following information sources? [the shares present the sum of answers: very often + often + sometimes]

		Per company size: 1-4 FTE	5-14 FTE	15+ FTE
Printed product documentation	30%	33%	34%	33%
Manufacturer magazines	30%	33%	[illegible]	33%
Professional magazines/newspapers	30%	[illegible]	[illegible]	[illegible]

Base, all installers, N=XX

Top8 mentioned professional printed media

Q: Which professional magazines do you read?

		Per company size: 1-4 FTE	5-14 FTE	15+ FTE
Gas safe Registered Gas Engineer	30%	33%	34%	33%
HVP (Heating Ventilation Plumbing)	30%	33%	34%	33%
Heating and Plumbing Monthly	30%	33%	34%	33%
PHAM News	30%	33%	34%	33%
PHPI (Professional Heating and Plumbing Installer)	30%	33%	34%	33%
H&V News	30%	33%	34%	33%
ACR News	30%	33%	34%	33%
Refrigeration and Air Conditioning Magazine	30%	33%	34%	33%

Base, installers reading professional magazines, N=XY

USP

Radio listening at work has dropped among installers in Belgium, but more than half still listen to it. Radio station Studio Brussel remains the most popular choice.

56%

1-4 FTE	5-14 FTE	>15 FTE
56%	40%	73%

of the installers are **LISTENING TO THE RADIO** while at work

Base, random selection: N (2024)= 51

Top10 radio channels that are most listened to

Q: And which radio station do you listen to most of the time?

	Total	Per company size: 1-4 FTE	5-14 FTE	15+ FTE
Studio Brussel	39%	43%	33%	38%
Qmusic	21%	14%	0%	38%
Joe	18%	21%	0%	25%
Radio 1	16%	7%	17%	25%
Radio 2	9%	0%	17%	13%
Willy	8%	7%	0%	13%
NJR	7%	0%	33%	0%
Nostalgie	4%	0%	17%	0%
Local radio stations	3%	7%	0%	0%

Base, installers listening to the radio while at work: N (2024)= 28**
** Very small sample size (n<30), only qualitative insights available.

USP

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30%

1-4 FTE	5-14 FTE	>15 FTE
33%	34%	33%

of the installers **have personal contact with MUNUFACTURER'S REPRESENTATIVES**

Using other personal information sources

Q: To what degree do you use the following information sources? [the shares present the sum of answers very often + often + sometimes]

		Per company size 1-4 FTE	5-14 FTE	15+ FTE
Advice from wholesaler (sales assistant)	30%	33%	34%	33%
Events at the wholesaler's	30%	33%	34%	33%
Visiting manufacturer's events	30%	33%	34%	33%

Base, all installers

Circumstances under which contact with the manufacturer representative is appreciated

Q: When/ in what cases do you appreciate if a representative of the manufacturer contacts you?

		Per company size 1-4 FTE	5-14 FTE	15+ FTE
New product / innovation	30%	33%	34%	33%
Problems/ specific issues	30%	33%	34%	33%
New prices	30%	33%	34%	33%
Under predefined terms, e.g. once per year	30%	33%	34%	33%
When I have to make a product or brand choice	30%	33%	34%	33%
Visit as a part of a marketing campaign	30%	33%	34%	33%
When I need to perform a design or calculation	30%	33%	34%	33%
Trainings	30%	33%	34%	33%
Never	30%	33%	34%	33%

Base, installers having personal contact with manufacturer's representatives: N = XA

USP

More installers in Belgium reported visiting trade shows in 2024, and most plan to continue doing so in the coming years. Install Day took over the top position as the most popular trade show.

44%

1-4 FTE	5-14 FTE	>15 FTE
49%	29%	54%

of the installers **VISIT(ED) TRADE SHOWS**

Base, all installers: N (2024)= 101

74% *

of the installers who **visit(ed) trade shows, plan to continue visiting trade shows** in the coming years

Base, installers visiting trade shows: N (2024)=44*

The most popular trade shows*

- Install Day (46%)
- VSK (14%)
- Don't know (40%)

Base, installers visiting trade shows and expecting to do so in the next 2 years: N (2024)= 6** |
* Small sample size (n<50), the insights are only indicative. | ** Very small sample size (n<30), only qualitative insights available.

USP

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30%

1-4 FTE	5-14 FTE	>15 FTE
33%	34%	33%

of the installers **SEARCH THE INTERNET**

Base, all installers

Top6 types of websites where installers search information about products and brands

Q: Via what type of websites do you search information on Internet about products and brands?

		Company size		
		1-4 FTE	5-14 FTE	15+ FTE
Manufacturers' websites	30%	33%	34%	33%
Google	30%	33%	34%	33%
Wholesalers' website	30%	33%	34%	33%
Specialised professional online forums	30%	33%	34%	33%
Professional magazines' websites	30%	33%	34%	33%
Social media	30%	33%	34%	33%

Base, installers searching the Internet: N = XD

Top10 websites searched

Q: Could you please name the websites you visit when you search for information about products and brands?

	%
https://www.google.com/	30%
https://www.google.com/	30%
https://www.google.com/	30%
https://www.google.com/	30%
https://www.google.com/	30%
https://www.google.com/	30%

- 30% of the respondents visit other websites (that have been mentioned less than three times)
- 30% do not know/ can not recall the names of the websites they visit

Base, randomly selected installers searching the Internet: N = XE

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30%

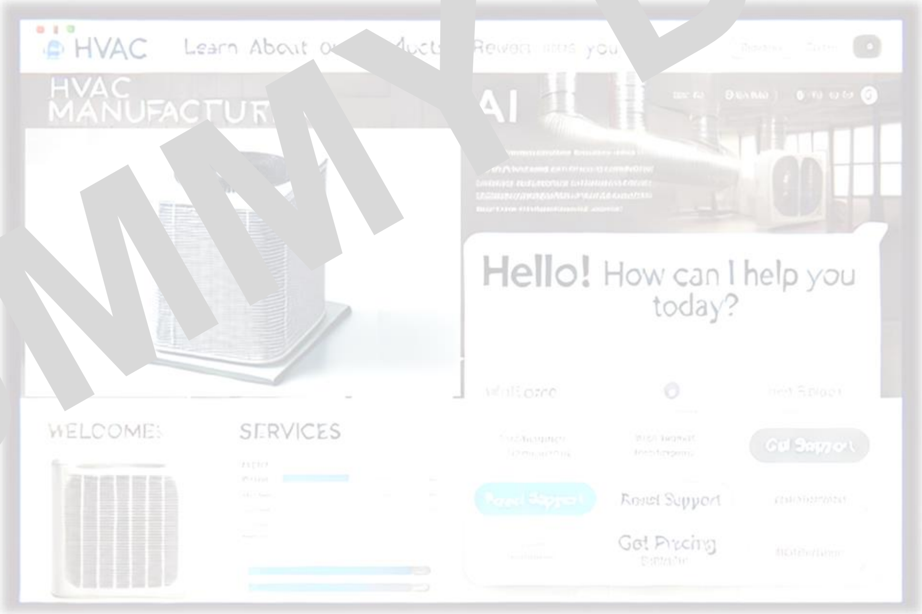
	1-4 FTE	5-14 FTE	>15 FTE
	33%	34%	33%

of the installers **SEARCH MANUFACTURER'S WEBISTES**

30%

	1-4 FTE	5-14 FTE	>15 FTE
	33%	34%	33%

of the installers would like to have **the chatbot function** on the manufacturer's website



Base, installers searching manufacturer's websites: N = XF

USP

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30%

1-4 FTE	5-14 FTE	>15 FTE
33%	34%	33%

of the installers **use apps for professional purpose**

Base, all installers: N (2024)= XXX

Top10 apps used for professional purposes

Q: Can you mention which Apps do you use on a regular basis for professional purposes?

	%
WhatsApp	30%
Apps from manufacturer	30%
Apps from wholesaler	30%
Apps from manufacturer	30%
Apps from wholesaler	30%

Top10 purposes of using apps for professional purpose:

Q: What do you use the Apps for?

		Per company size 1-4 FTE	5-14 FTE	15+ FTE
Advice about products	30%	33%	34%	33%
Product range information	30%	33%	34%	33%
Specification texts	30%	33%	34%	33%
Information on availability of the products	30%	33%	34%	33%
Information about products warranties	30%	33%	34%	33%
Product installation isntructions	30%	33%	34%	33%
Innovations/ new products	30%	33%	34%	33%
Making of calculations	30%	33%	34%	33%
Commissioning	30%	33%	34%	33%
Monitoring	30%	33%	34%	33%

Base, installers searching manufacturer's websites: N = XF

USP

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30%

	1-4 FTE	5-14 FTE	>15 FTE
	33%	34%	33%

of the installers **USE SOCIAL MEDIA FOR PROFESSIONAL PURPOSES**

Base, all installers

Top9 reasons for using social media for professional purposes:

On which occasion do you use social media for professional purpose?

		Per company size		
		1-4 FTE	5-14 FTE	15+ FTE
Product range information	30%	33%	34%	33%
Trade shows and events	30%	33%	34%	33%
Innovations	30%	33%	34%	33%
Latest news	30%	33%	34%	33%
Opinion of colleagues	30%	33%	34%	33%
Opinion of colleagues	30%	33%	34%	33%
To recommend a product	30%	33%	34%	33%
Networking	30%	33%	34%	33%
Information about prices	30%	33%	34%	33%

Base, randomly selected installers using social media for professional purposes: N = XG

USP

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30%

1-4 FTE	5-14 FTE	>15 FTE
33%	34%	33%

of the installers **USE SOCIAL MEDIA FOR PROFESSIONAL PURPOSES**

Usage of social media for professional purposes

Q: Which of the following social media do you use for professional purpose?

1. 30%
2. 30[illegible]
3. [illegible]
4. 30%
5. 30%
6. 30%
7. 30%
8. 30%

Base, all installers

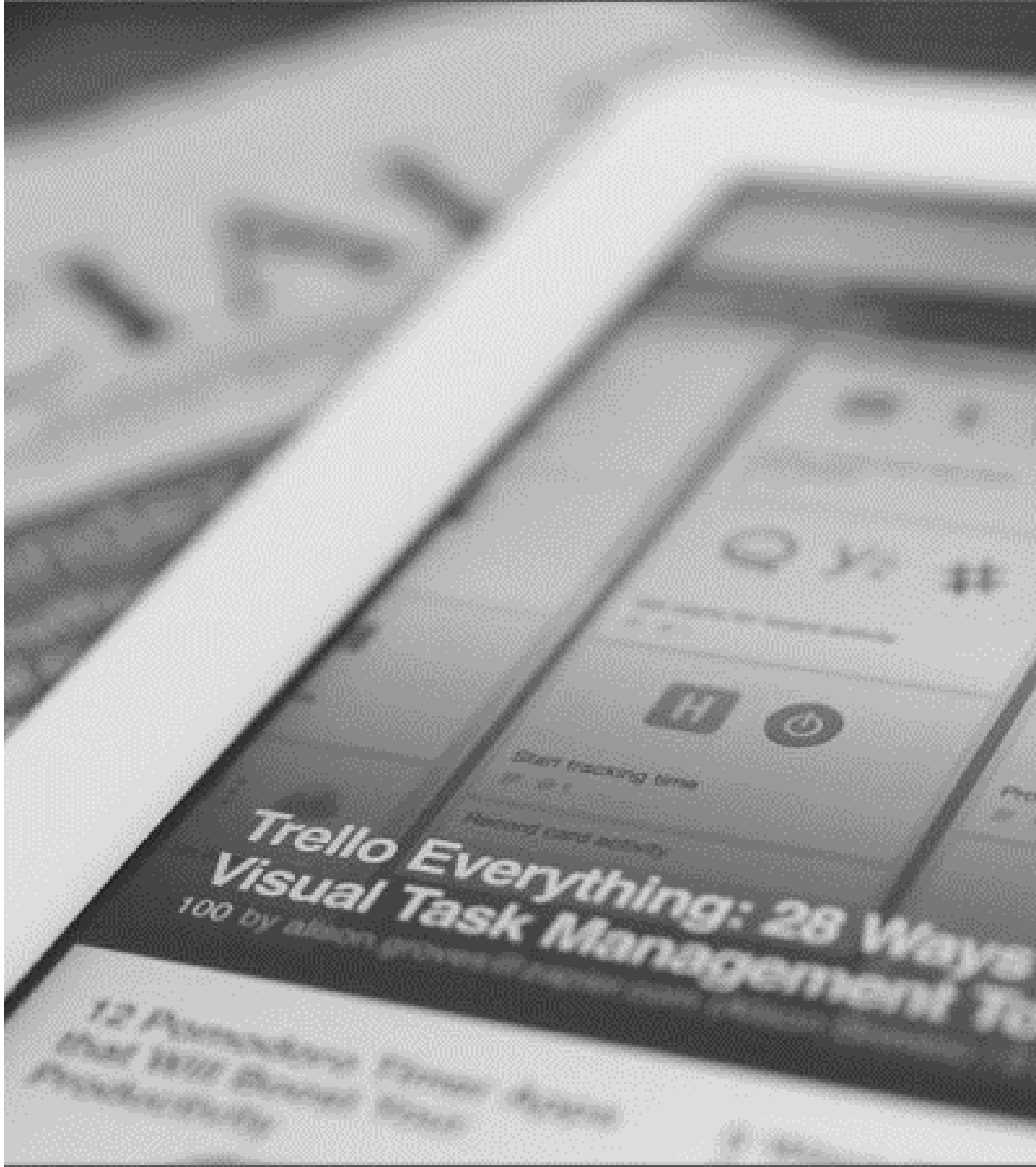
WhatsApp usage for professional purposes

Q: Do you use WhatsApp to communicate with manufacturers | …with wholesalers?

		Per company size		
		1-4 FTE	5-14 FTE	15+ FTE
Manufacturers	30%	33%	34%	33%
Wholesalers	30%	33%	34%	33%

Base, installers using WhatsApp for professional purposes: N = XH

Index



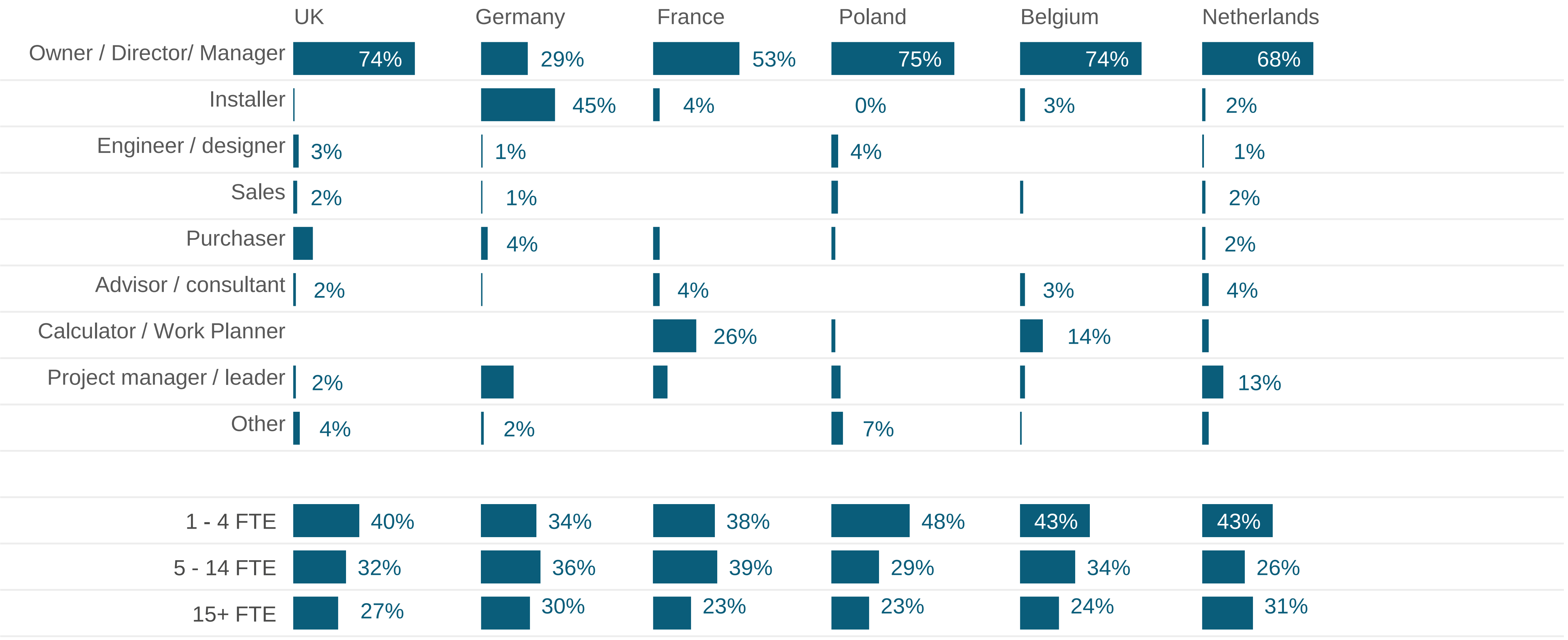
Trello Everything: 28
Visual Task Management
Start tracking time

Respondents’ background characteristics

Job title of the interviewed respondents and the **company size**

Q: What is your position within the company?

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



Q4 2024 data, unweighted

USP Marketing Consultancy

Corporate Presentation

2025

USP Marketing Consultancy

About USP Marketing Consultancy

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

Dedicated research and market reports.

Active in more than 30 countries per year.

Head Office
NL - Rotterdam

Branch Office
HR - Zagreb

Subsidiary
DE - Dusseldorf

Our Services

USP

DEDICATED MARKET RESEARCH

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

MARKET REPORTS

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

OUR ADDED VALUE

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

OUR GEOGRAPHIC SCOPE

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

Our Services

Dedicated Market Research

- Product Development
- Segmentation
- Customer Satisfaction
- Pricing
- Branding
- Driver Analysis
- Customer Journey
- Market Size
- Market Exploration

56.750	66.400	78	1.778	1.778
Phone interviews	Online interviews	Group discussions	In-depth interviews	Number of projects

Market Reports

- European Architectural Barometer
- Contract Monitor
- Painter Insight Monitor
- Handyman Insights Monitor
- European Electrical Installation Monitor
- European Mechanical Installation Monitor
- European Garden Monitor
- European Home Improvement Monitor

13.600	26.400	82	78
Phone interviews	Online interviews	Customers	Number of market reports

Dedicated Market research

USP

Branding

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

Customer Satisfaction

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

Customer Journey

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

Product Development

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

Segmentation

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

Market Size

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

Market Exploration

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

Pricing

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

Driver Analysis

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

- 304 dedicated project in 2023/2024
- Tailor-made projects, driven by your information needs
- More then just a data provider, advice & insights based on facts and over 30 years of experience in the industry
- Worldwide coverage
- B2B, B2C, qualitative and quantitive research or a combination of both
- Within our market specialism, all types of researches can be conducted
- Targeting the right audience, with the right questions at the right time

Market reports

USP

	Target group	Methodology	Total interviews	Countries	Frequency	Themes 2024
European Architectural Barometer	Architects	Phone interviews	3,400		Quarterly	Sustainability, Trends in material usage, Decision making, Brand Health Scan
European Contract Monitor	Contractors	Phone interviews	2,050		Bi-annually	Prefabrication, Digitalisation and BIM
European Mechanical Installation Monitor	HVAC Installers	Phone interviews	2,600		Quarterly	Digitalisation and BIM, Prefabrication, Smart buildings and products, Media orientation
European Electrical Installation Monitor	Electrical installers	Phone interviews	3,000		Quarterly	Sustainability, Smart buildings and products, Services in the installation market
European Painter Insight Monitor	Professional painters	Phone interviews	2,300		Annually	Trend tracking, Sustainability, Labour shortage, Online buying, Media orientation
European Home Improvement Monitor	Consumers	Online interviews	26,400		Quarterly	Orientation; rise of digital natives, Purchase Channels; online leaders Brand health check, DIY vs DIFM; outsourcing jobs
European Handyman Monitor	Handymen	Phone interviews	3.400		Quarterly	Trend tracking, Activities and product usage, Purchase and decision behaviour, Brand performance scans
European Garden Monitor	Consumers	Online interviews	6.400		Annually	Smart Garden, Sustainable Garden, City Gardening, Health Gardening, Outdoor living

A selection of USP Marketing Consultancy's clients

USP

Construction

- ASSA ABLOY
- 3M
- FLEX Das Original
- Kingspan
- VELUX
- TOOLSTATION
- BMI
- FESTOOL
- fischer
- KNAUF
- DAW
- amtico flooring
- forbo
- ROCKWOOL
- covestro
- REYNAERS aluminium
- WD-40
- PPG
- BOLTON
- AkzoNobel
- SIG
- Wienerberger
- SAINT-GOBAIN
- Sika

Installation

- ABB
- BOSCH
- GIRA
- DORNBRACHT
- GRUNDFOS
- hager
- sonepar
- Schneider Electric
- LG
- PIPELIFE
- KALDEWEI
- MITSUBISHI ELECTRIC
- legrand
- TRILUX SIMPLIFY YOUR LIGHT.
- SAMSUNG
- VIESSMANN
- Vaillant
- REHAU
- EMERSON
- wavin
- GEBERIT
- DAIKIN
- signify
- ROTHENBERGER

Home Improvement

- adeo
- Orkla House Care UK
- Dulux
- tesa
- 3V3
- GROHE
- Villeroy & Boch
- MTD For A Growing World
- Bostik smart adhesives
- KÄRCHER
- hansgrohe
- UNILIN
- AkzoNobel
- NEWAGE PRODUCTS
- StanleyBlack&Decker
- maxeda DIY Group
- DELI HOME
- BRIGGS & STRATTON
- cromology
- Ideal Standard
- ShurTech Brands
- Yale
- BOLTON ADHESIVES
- PPG

Client's testimonials on market reports

USP

CATRIN KLEIN
Head of Customer & Market Insights at Hilti

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

DANIEL ANGELOVSKI
Group Insights Manager at Velux

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

MIRYAM SALVADOR
Global Channel Director at Schneider Electric

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

DALIA GONCIAUSKAITE
Marketing Manager Architectural at Covestro

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

HARDY JAESCHKE
Senior Manager Market Research, Market Intelligence at Vaillant Group

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

ARMIN DIPPING
Senior Manager strategic and international Marketing at Gira

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

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

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

JUSTYNA GUDOWSKA-POHLING
AC EMEA Customer Insights Manager at PPG

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

*For more testimonials you can visit our website!

Client’s testimonials on dedicated research

USP

GORDON MURRAY-SMITH

Market Intelligence and Insight Manager at BMI

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

PAUL O’DWEYER

Global Consumer Market Development Manager at Bostik

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

JOOST MAARSE

Global Lead Circular Economy at Grundfos

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

HENDRIKJE BUDENBERG

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

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

FEDERICO ITRI

Associate Commercial Excellence Manager EMEIA at ASSA ABLOY Opening Soultions

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

SUZANNA LAMMERTS VAN BUEREN

Director Business Development Northern Europe at Somfy

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

OLGA KOLOS

Electrician Program Director, Global at Schneider Electric

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

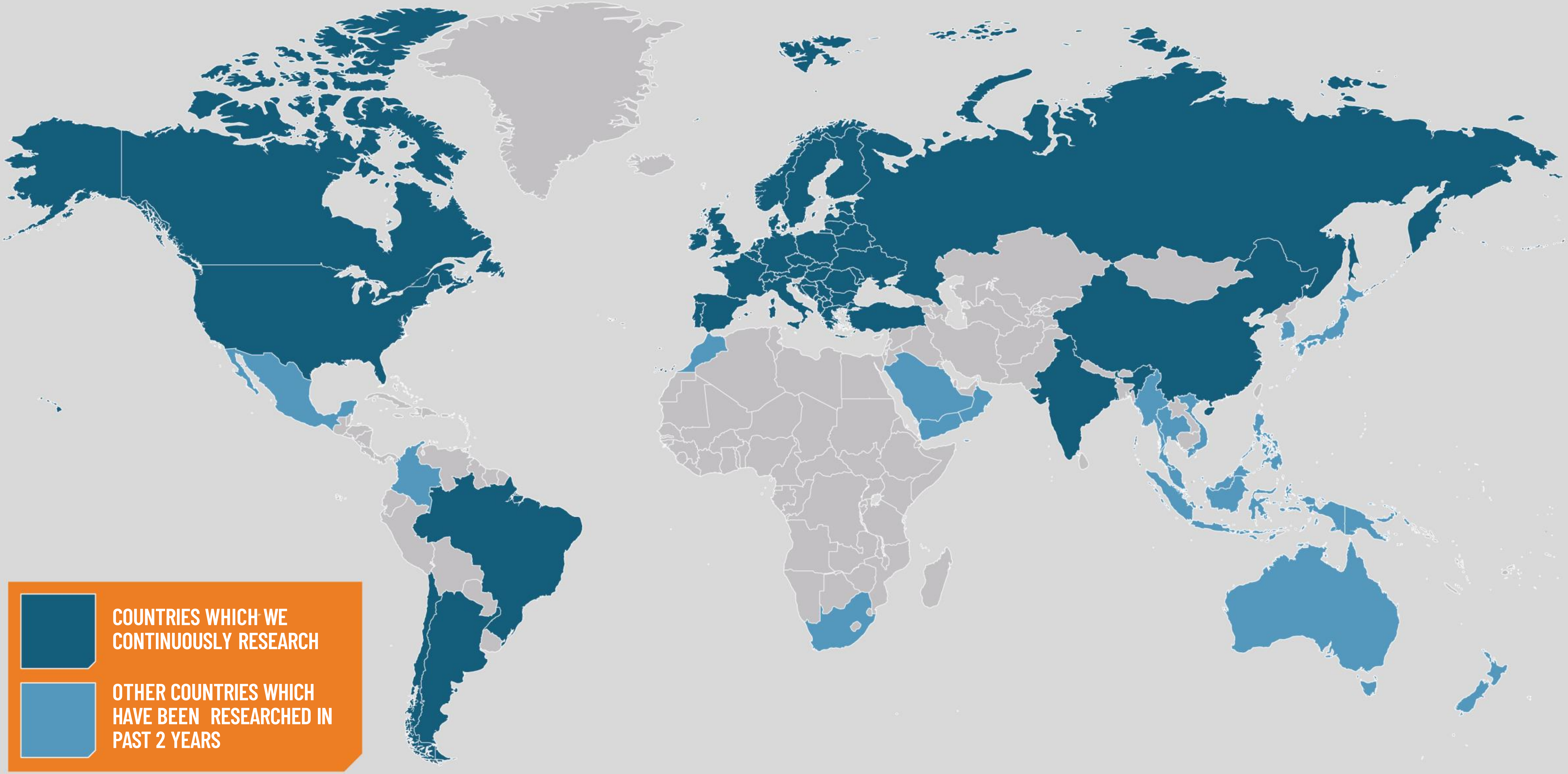
KATERINE BRUUN NIELSEN

Group insights Manager at Velux

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

*For more testimonials you can visit our website!

Our scope


COUNTRIES WHICH WE CONTINUOUSLY RESEARCH
OTHER COUNTRIES WHICH HAVE BEEN RESEARCHED IN PAST 2 YEARS

USP Marketing Consultancy