



European Electrical Installation Monitor

Our proposal for your company

Dynamic Market Conditions

- **Key trends** like omnichannel, changes in DMU, electrification, changing role of the wholesale, digitization and many more are shaping the market. Knowing where, how and when these trends become relevant is key market intelligence input for strategic decision making.
- The European Electrical Installation monitor follows these trends **in 7 countries**.
- **Each quarter** a key trend is investigated and reported.
- Marketing budgets will not allow running a dedicated market research for each trend in the market. The European Electrical Installation Monitor will provide you with **need to know information against relatively low costs**.
- The European Electrical Installation Monitor is a **co-makemanship** - together with our clients we decide which trends to investigate.

Understanding the Installers

- Both the traditional route to market (manufacturer-wholesale-installer) and the way installers are getting information is changing. Digitalization, online buying and buying direct from manufactures are some of the drivers for this. This trend makes pull marketing much more important. In order to do pull marketing, it's vital to know your target group
- The European Electrical Installation monitor provides **key information on what activities installers are doing**, how they orientate themselves, what training needs they have, how digital they are and much more. Information which is vital for a good marketing strategy and essential for internal discussions.
- **Trends and themes are repeated in 1, 2 or 3 year intervals**. This way, trendlines and predictions can be made.

Comparable Results

- It is always hard to compare different types of research with different types of methodology. Especially if you want to have a country by country comparison. Trends will not be the same or develop at the same rate in the different countries
- The European Electrical Installation monitor is conducted in 7 countries with the **same methodology and questionnaire** (small local differences aside and in the native language) making the results highly comparable.
- Not only the **trends can be compared country by country**, but also the orderbook & turnover developments at Installation companies. This information is highly valuable to assess market conditions and sales feedback.



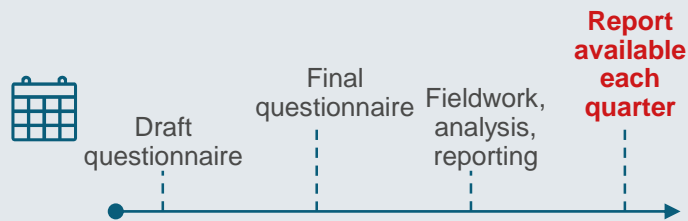
Research objectives

Create a better understanding of the installers & their behavior

Track the economical development at installation companies (turnover & orderbook)

Provide need to know information on marketing topics like purchase channels, brand position, classification/segmentation of the installer, etc.

Planning & Process each quarter



Methodology



Quantitative phone research in 7 countries (100 interviews in both the Netherlands and Belgium and 150 in the other five)

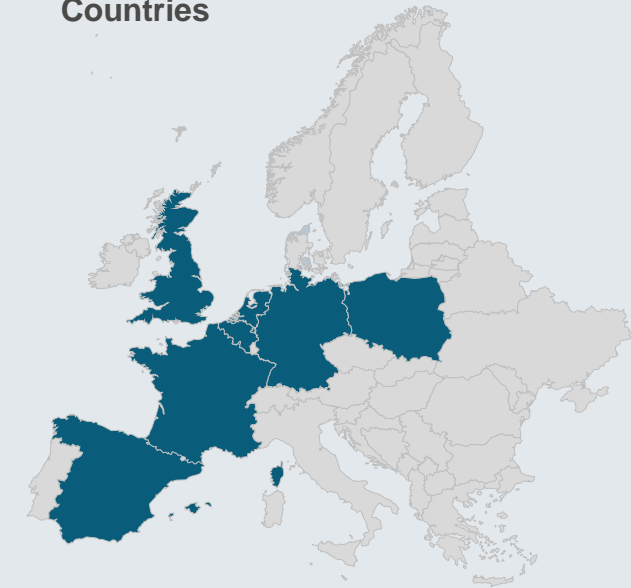
950 interviews per quarter

Target group



Electrical installers

Countries



Costs

Yearly subscription fee: € 14.000

Includes:

- 4 quarterly reports per year
- Possibility to give your input on the questionnaire
- 3 exclusive questions per year

Research topics 2018

- Q1: BIM & calculation tools
- Q2: Segmentation of the electrical installer
- Q3: Direct buying at manufacturers
- Q4: Purchase Channels

Research topics 2019

- Q1: Media orientation
- Q2: Labour shortage and its consequences
- Q3: Online ordering and buying
- Q4: Smart buildings/products

Example: Creating a better understanding of the installers & their behavior

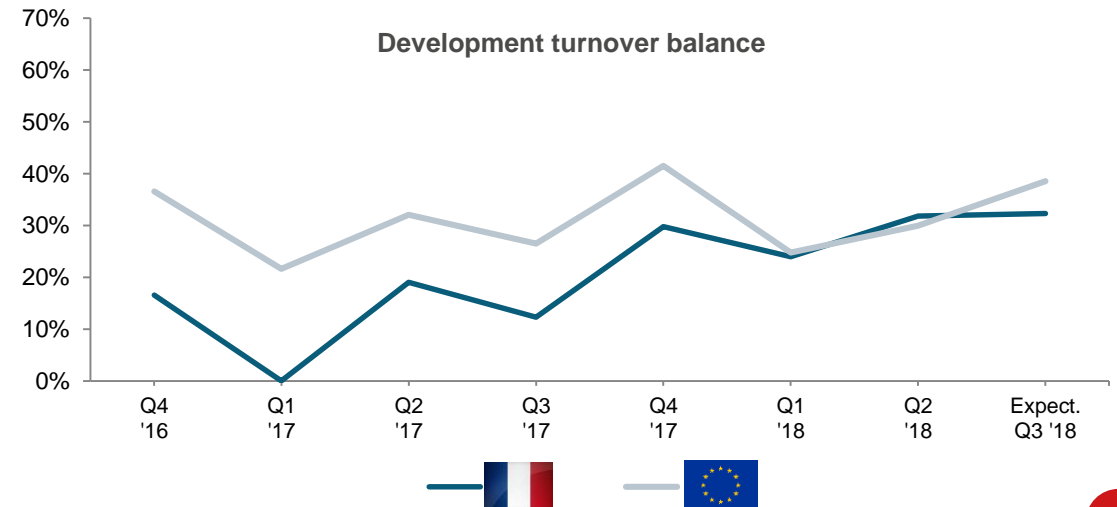
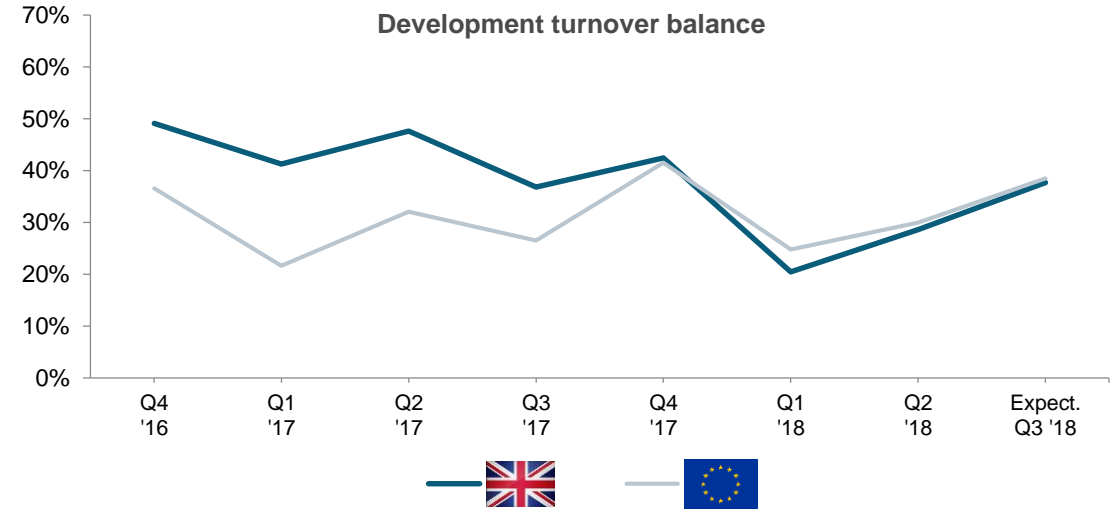
Company size							
1-4 FTE	23%	30%	38%	43%	47%	37%	32%
5-14 FTE	43%	39%	39%	32%	27%	35%	39%
15+ FTE	35%	32%	24%	26%	26%	28%	30%
<i>N</i>	200	200	200	200	100	100	200

Services provided by installers							
Maintenance services	77%	87%	73%	71%	82%	84%	91%
Advice and consultancy on the maintenance of the installation systems	60%	60%	72%	44%	66%	81%	66%
Advice and consultancy on products and technical solutions	51%	72%	70%	36%	80%	88%	60%
Design and engineering of installation systems	65%	60%	49%	48%	57%	66%	50%
Advice and consultancy on sustainability and energy saving	40%	64%	49%	17%	54%	77%	58%
Other	1%	2%	1%	3%	1%	0%	2%

Example: Orderbook and turnover developments

Turnover

- The graphs on this and the next page show the development of the turnover balances of the installation companies in the different countries. For each country a graph is given, showing the development of that country compared to the 'European' average of the seven countries together.
- In general Germany and especially the Netherlands perform above average. Polish installers show, compared to the other countries, the least positive results.

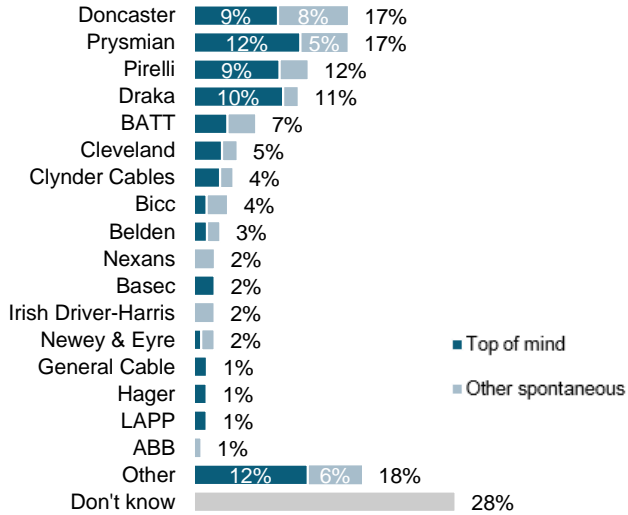


Example: theme part “Love brands”

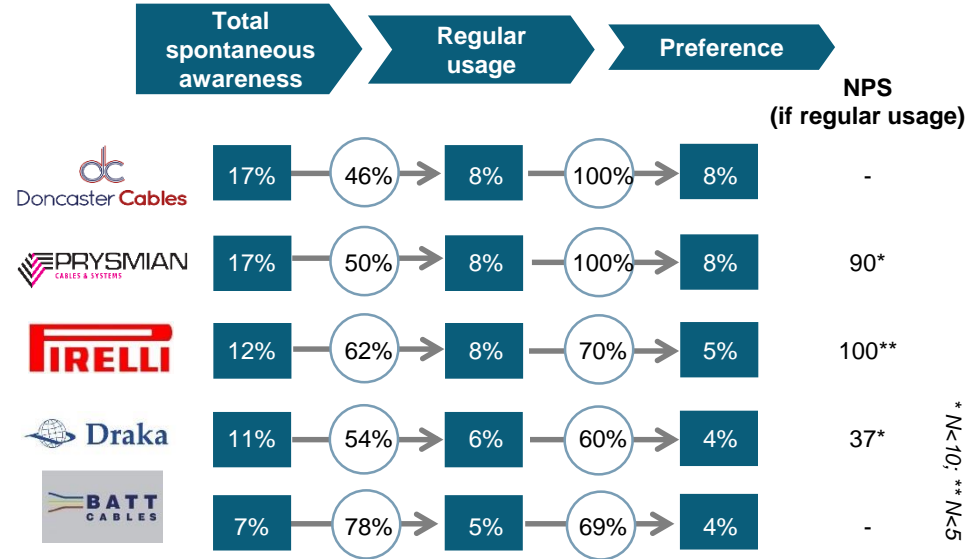
Product groups installers regularly work with							
Cables and wiring	97%	97%	90%	99%	96%	100%	98%
Switches / sockets outlets	93%	97%	85%	89%	94%	93%	90%
Lighting (the actual lighting source)	90%	85%	87%	82%	90%	92%	86%
Electrical enclosures	91%	71%	84%	78%	94%	93%	93%
Luminaries	84%	74%	85%	77%	86%	91%	84%
Sensors / detectors NOT related to burglary prevention	76%	31%	40%	56%	51%	78%	61%
Electrical heating	70%	35%	72%	46%	36%	43%	33%
Home automation systems	34%	54%	45%	46%	49%	50%	28%
Sensors / detectors related to burglary prevention	51%	35%	42%	55%	43%	39%	21%
Number of product groups regularly work with	6.9	5.8	6.3	6.3	6.4	6.8	5.9
N	200	200	201	200	100	100	200

Example: theme part love brands (Cables and wiring)

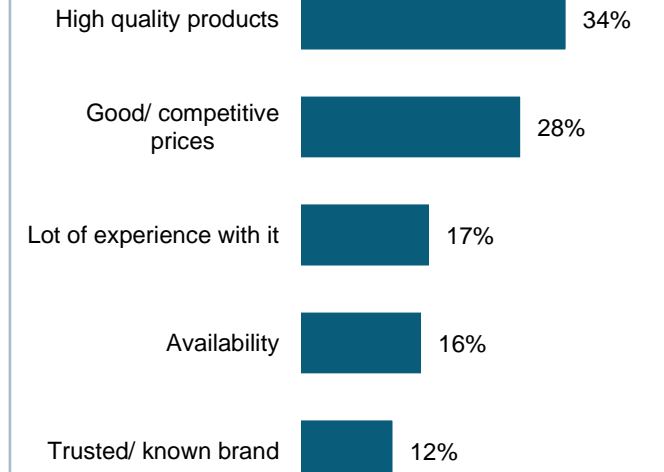
Spontaneously known brands



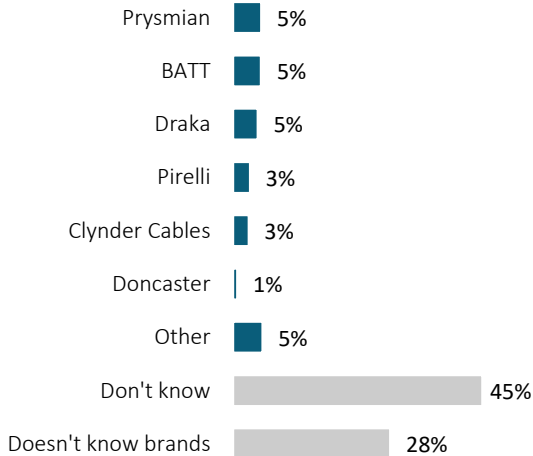
Brand funnel



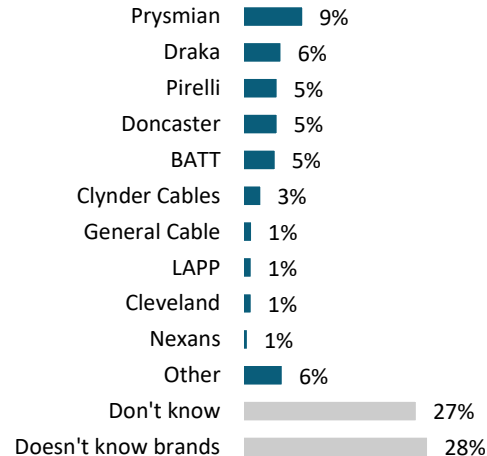
Reasons for preferring a brand



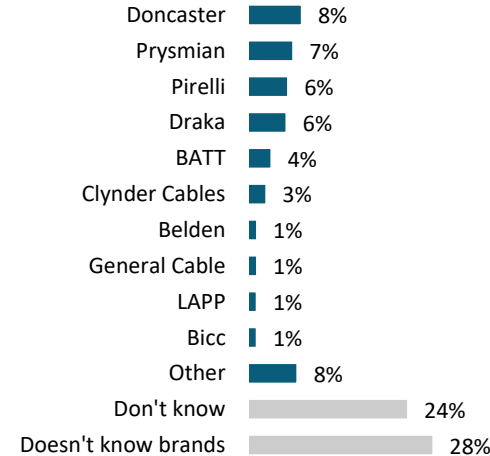
Most innovative brand



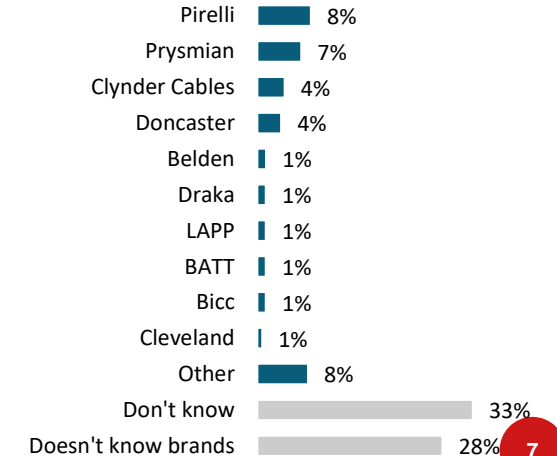
Best partner of the installer



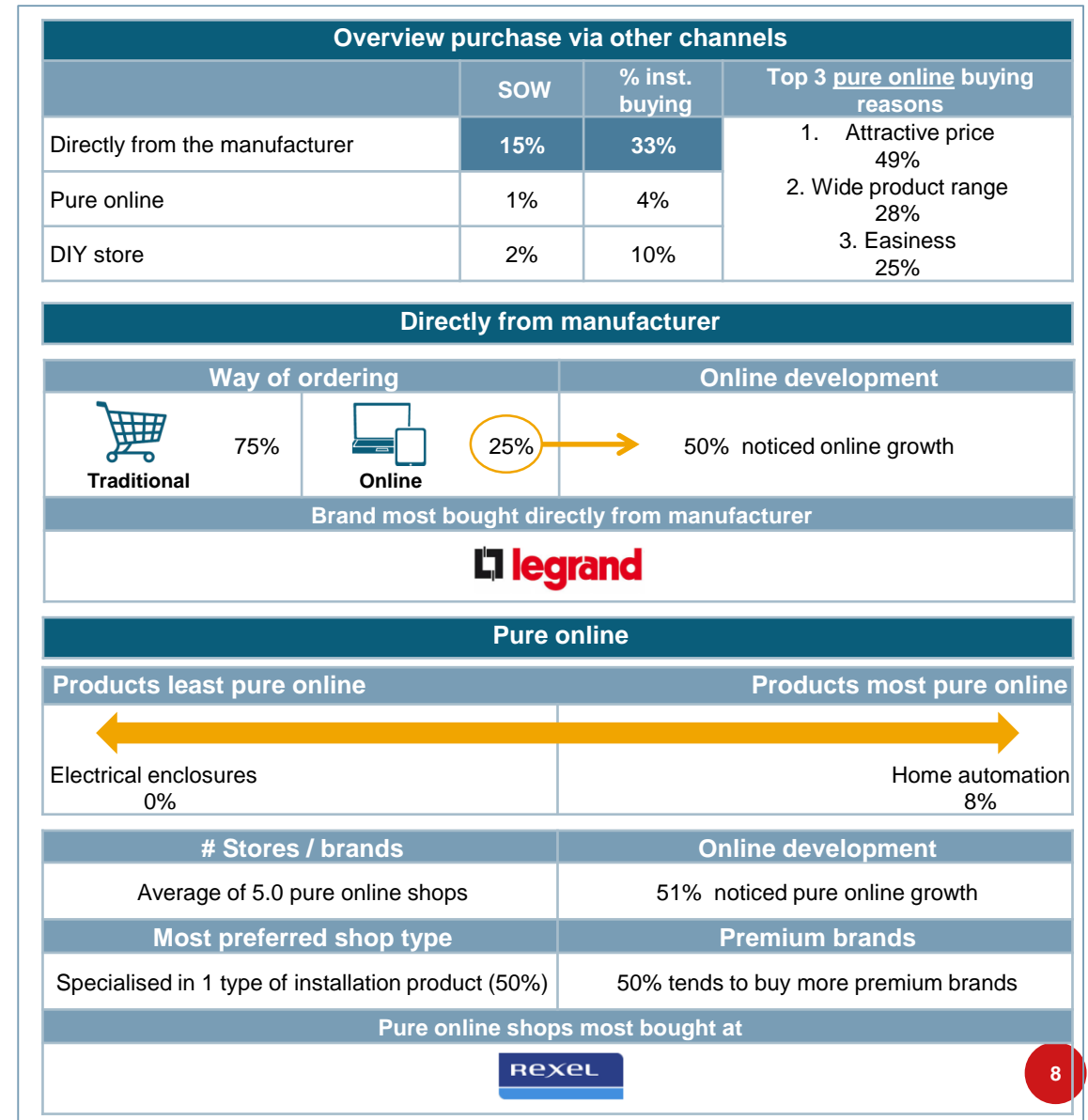
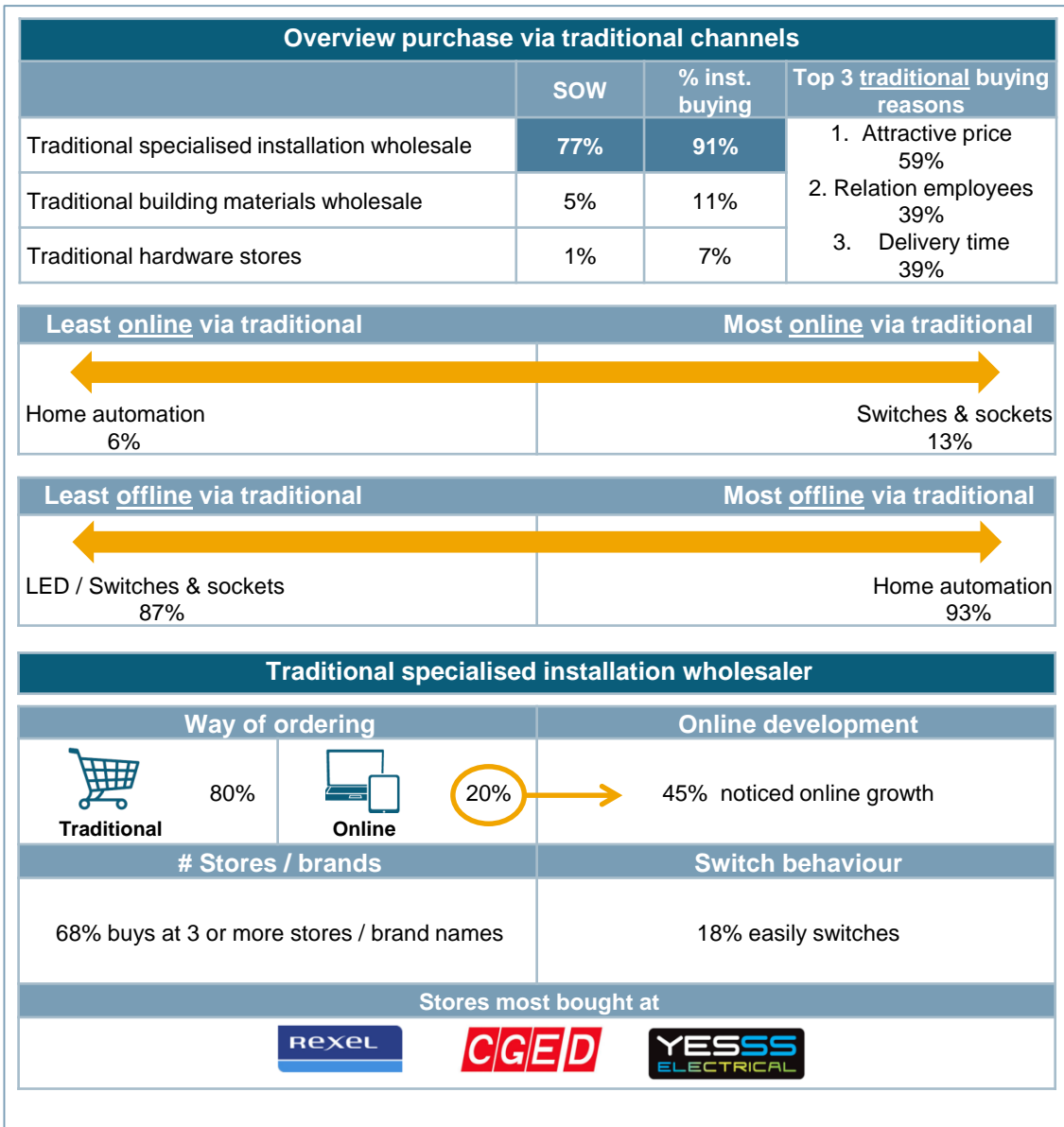
Most reliable brand



Best known among end consumers



Example: theme part purchase channels France



Example: theme part “Media orientation & Consumption Spain”

Information search in general			
Average # of information sources: 10.3			
Information sources			
Top 3 used	Kind of media	Top 3 most useful	Kind of media
General surfing on internet (93%)	New	General surfing on internet (47%)	New
Advice from wholesaler/ sales ass. (92%)	Personal	Visiting websites manufacturers & wholesalers (27%)	New
Visit of representative manufacturer; Usage of digital documentation files (90%)	Personal; New	Visit of representative manufacturer (16%)	Personal
Main source on jobsite	Preferred sources for...		
Top 3	...technical information	...commercial information	
Phone contact with supplier (25%)	Manufacturer website (45%)	Manufacturer website (48%)	
Internet in general (24%)	E-mail (29%)	E-mail (37%)	
Phone in general (22%)	Visit from sales engineer; Printed catalogue (26%)	Visit from sales engineer (28%)	
Traditional media			
Professional magazines + searching for		Manufacturer magazines	
47% makes use 13% often	Innovations/ novelties/ new products (40%)	71% makes use 28% often	Innovations/ novelties/ new products (50%)
Top 3 professional magazines			
		Apiens	
		Colegio de ingenieros technicos	

Personal media			
Trade shows		Visit of representative	
77% makes use 21% often	See new products/ innovations (76%)	# trade shows per year: 2.0	90% makes use 52% often
		Appreciated for new product/ innovation (38%)	
Most visited trade shows			
New media			
General surfing on internet/ websites		Reading of digital newsletters	
93% makes use 72% often	Technical product info/ specifications (60%)	68% makes use 22% often	Innovations/ novelties/ new products (39%)
Type of websites visited			
Website manufacturer (69%) Google (32%) Website wholesaler (12%)			
Social media			
Top 3	%	Top 3 reasons for using social media in general	%
	30%	Networking	17%
	22%	Product range information	15%
	18%	Latest news	10%



Topics

- Q1: Media Orientation & Consumption
- Q2: Changing role of the wholesaler
- Q3: Love brands of installers
- Q4: Smart Buildings & Connectivity



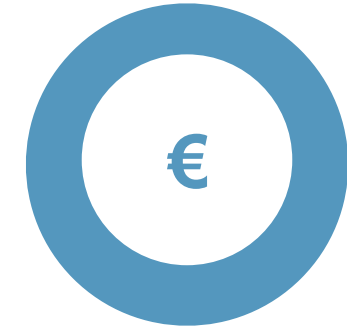
Topics

- Q1: BIM & Calculation Tools
- Q2: Segmentation of the installer
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- Q4: Purchase Channels



Topics

- Q1: Media orientation
- Q2: Labour shortage and its consequences
- Q3: Online ordering and buying
- Q4: Smart buildings/products



Pricing

- **Annual subscription fee of 14,000 Euro per year.**
- Delivery of 4 reports per subscription year covering all 7 countries.
- Input on topic choice and questionnaire.
- **Single reports available for 4,000 Euro**





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USP Marketing Consultancy



Head office



Subsidiary



Rotterdam

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Market specialist installation, construction and DIY from the **start**



Dedicated and **multi-client** research

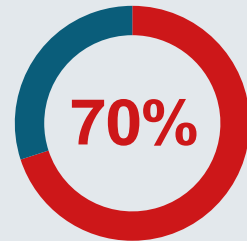


Active in the market for over **25 years**

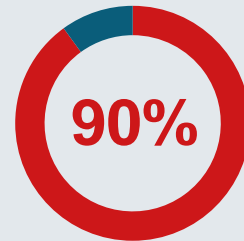


220 dedicated market research projects in 2017

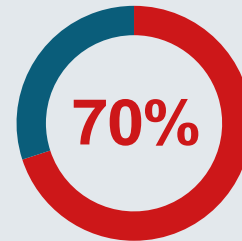
Revenue distribution



turnover coming from international projects



turnover coming from dedicated market research, **10%** from multi client



turnover coming from B2B, **30%** B2C

Research in **39** countries in 2017



82 focus groups



1.102 in-depth interviews



57.881 B2B CATI interviews



57.250 B2C online interviews



Examples



Segmentation



Customer journey



Branding



Concept/product research



Customer satisfaction



Trends



Distribution research



Market exploration



Pricing

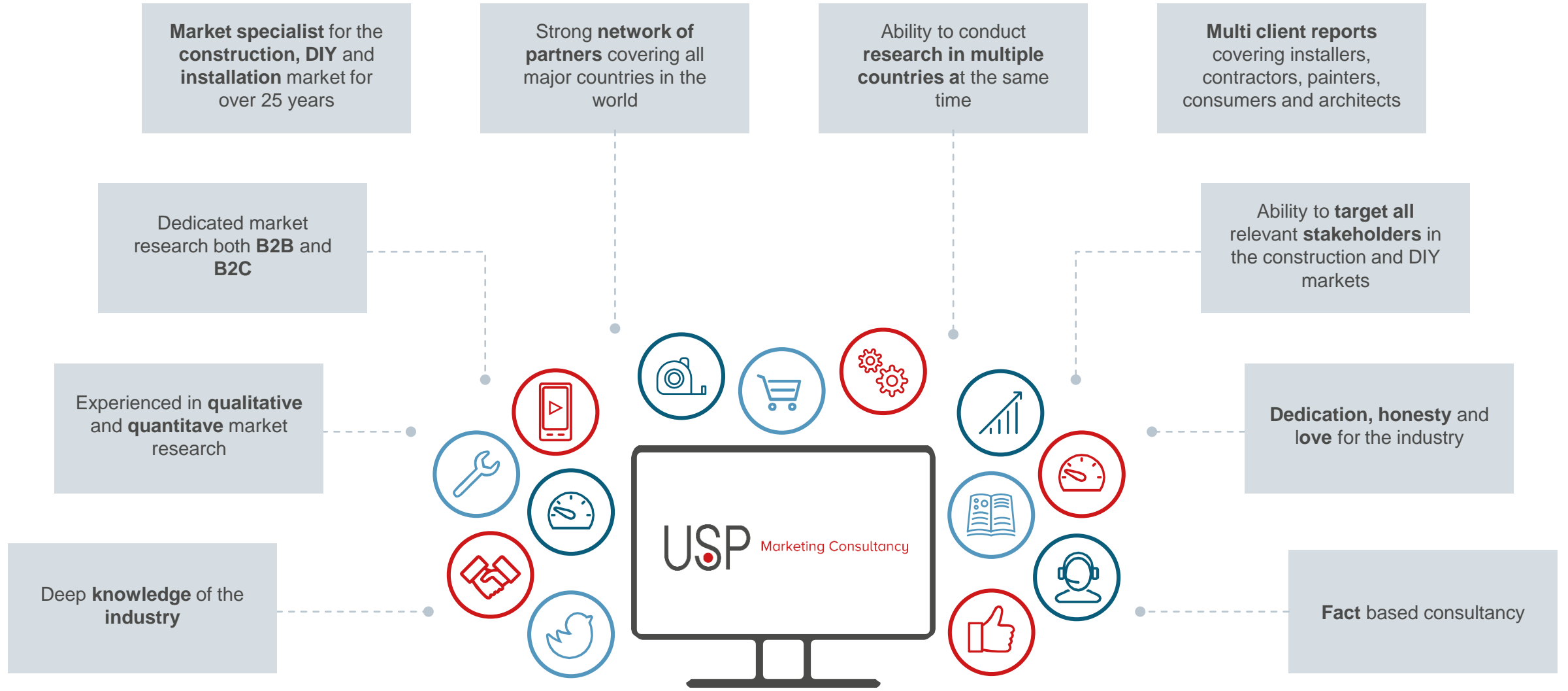


Market size



Dedicated market research

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



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