



**IC Customer Insight®**  
Heating in  
GER, FRA, AUT, NED  
2022

# Methodical Profile - IC Customer-Insight® Heating in EU 2022

- Das IC Customer Insight® Heating in Europe provides you with all the necessary information for an efficient brand policy. On the subject of heating, the study examines the purchasing and usage behavior of various heating systems and types of heating, brand awareness, brand usage of heating systems, buyer and information behavior and customer segmentation based on buying behavior and motives on the subjects on heating.
- All questions are evaluated separately for the various customer segments (age; product use; country etc.). Accordingly, the results can be viewed in a differentiated manner.
- Only homeowners (house owners) are surveyed.

## Population

Homeowners (house owners)  
over the age of 18

## Sample Size

Germany: N = 1.000  
France: N = 1.000  
Austria: N = 500  
Netherlands: N= 500

## Survey Method

Representative online survey  
Survey duration: approx. 10 min.

## Survey Period

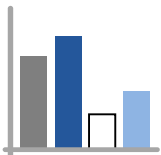
May 2022 (or on request)

# The Results of the Study will Give you Answers to the Following questions...

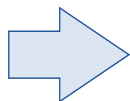


Which **Brand** are in use / are shortlisted / are avoided / are chosen when money is no object / are well-known (aided/unaided)?

How does the **Buying Process** work? Where do customers inform themselves about the brand and products? Which channels are preferred and which recommendations are trusted?



Details on the **Use** of heating systems: What are the purchasing barriers and what is currently in use in terms of heating systems und heating types in Germany, Austria, France and the Netherlands? What **Image** do the different heating systems and types have?



*Pre-orderers are able to influence the questionnaire/survey topics!*

# Study Design of the Customer-Insight® - Heating in EU 2022

## IC Customer-Insight® – Heating

Representative online survey– CAWI (Computer Assisted Web Interviews)

Anonymized survey, approx. 10 Min (30 questions)



### Survey Topics

Buying and Usage Behavior	Brand Awareness	Customer Journey	Customer Types
<b>Energy Sources</b> <div>Coal</div> <div>Gas</div> <div>Wood</div> <div>Electric</div> <div>Solar</div> <div>Oil</div> <div>District Heating</div>	<b>TOP Brands Overall</b> <b>Brands by Product Group</b> <b>Boiler</b> <div>Heat Pumps</div> <div>Chimney</div> <div>CHP</div> <div>Oven</div>	<b>Heating Systems</b>	<ul style="list-style-type: none"> <li>✓ Customer typologies according to purchasing behavior for heating systems and types of heating and motives relating to the topic of heating</li> </ul>
<b>Heating Systems</b> <div>Heat Pumps</div> <div>CHP</div> <div>Boiler</div> <div>Chimney</div> <div>Oven</div>	<div>Heat Pumps</div> <div>Chimney</div> <div>CHP</div> <div>Oven</div>	<ul style="list-style-type: none"> <li>✓ Purchase decision maker/influencers</li> <li>✓ Sources of information</li> <li>✓ Place of purchase</li> </ul>	
<b>Types of Heating</b> <div>Floor Heating</div> <div>Radiator</div>	<ul style="list-style-type: none"> <li>✓ Aided/unaided</li> <li>✓ Superior/inferior brands</li> <li>✓ Brand image</li> <li>✓ Brand use/Potential Set</li> </ul>		
<ul style="list-style-type: none"> <li>✓ Current usage (<i>Energy sources/heating system /type of heating</i>)</li> <li>✓ Willingness to change, Reasons for change &amp; Barriers (<i>heating system and type of heating</i>)</li> <li>✓ Image (<i>heating systems/types of heating</i>)</li> <li>✓ Purchase criteria/barriers</li> </ul>			

# The IC Customer-Insight Provides You with Answers to...

Evaluated topics within the scope of the survey

Buying- / Usage Behavior

BRANDS		
Brand Awareness	Which brands of heating systems do you know spontaneously? Which of the following brands for heating systems do you know?	
Brand Image	Which characteristics would you assign to brand XY?	
Superior / Inferior Brands	Which brand would you buy if money was no object? Which brand would you definitely not buy?	
etc.	What brand is your current heating system from? Have you ever seen catalogs/advertising material from brand XY?	
BUYING DECISION		
Where information obtained? How are individual information channels evaluated?		Source of Information
Who makes the buying decision and how strong is the influence on the purchase decision?		Decision Maker/ Influencer
Which criteria are decisive for the purchase?		Buying Criteria
Customer typologies based on motives and buying behavior, etc.?		etc.

# Who changes has reasons, who remains faithful also

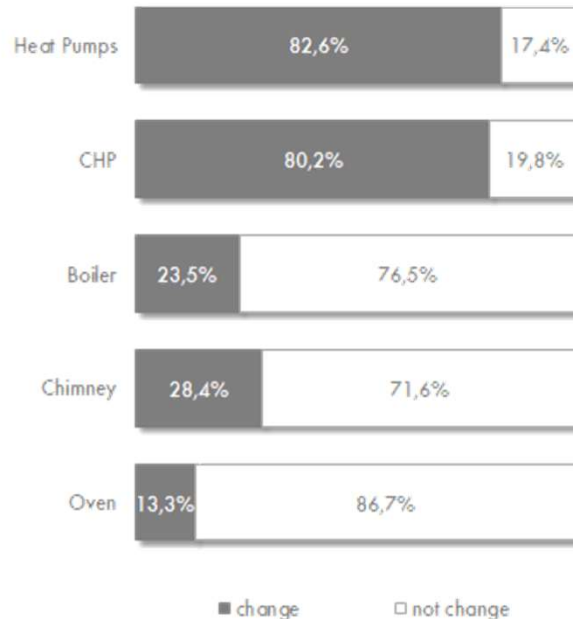
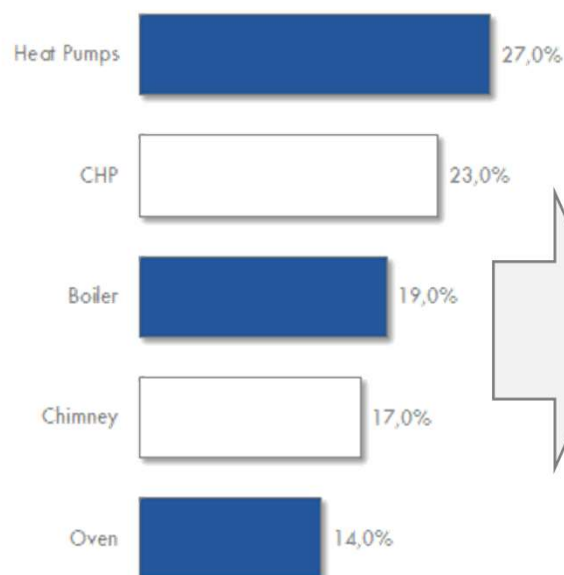
Scheme of inquiry current use, future use, reasons for and barriers to change

Buying- / Usage Behavior

## Survey current usage (in %)

## Willingness to change (in %)

## Reasons for change

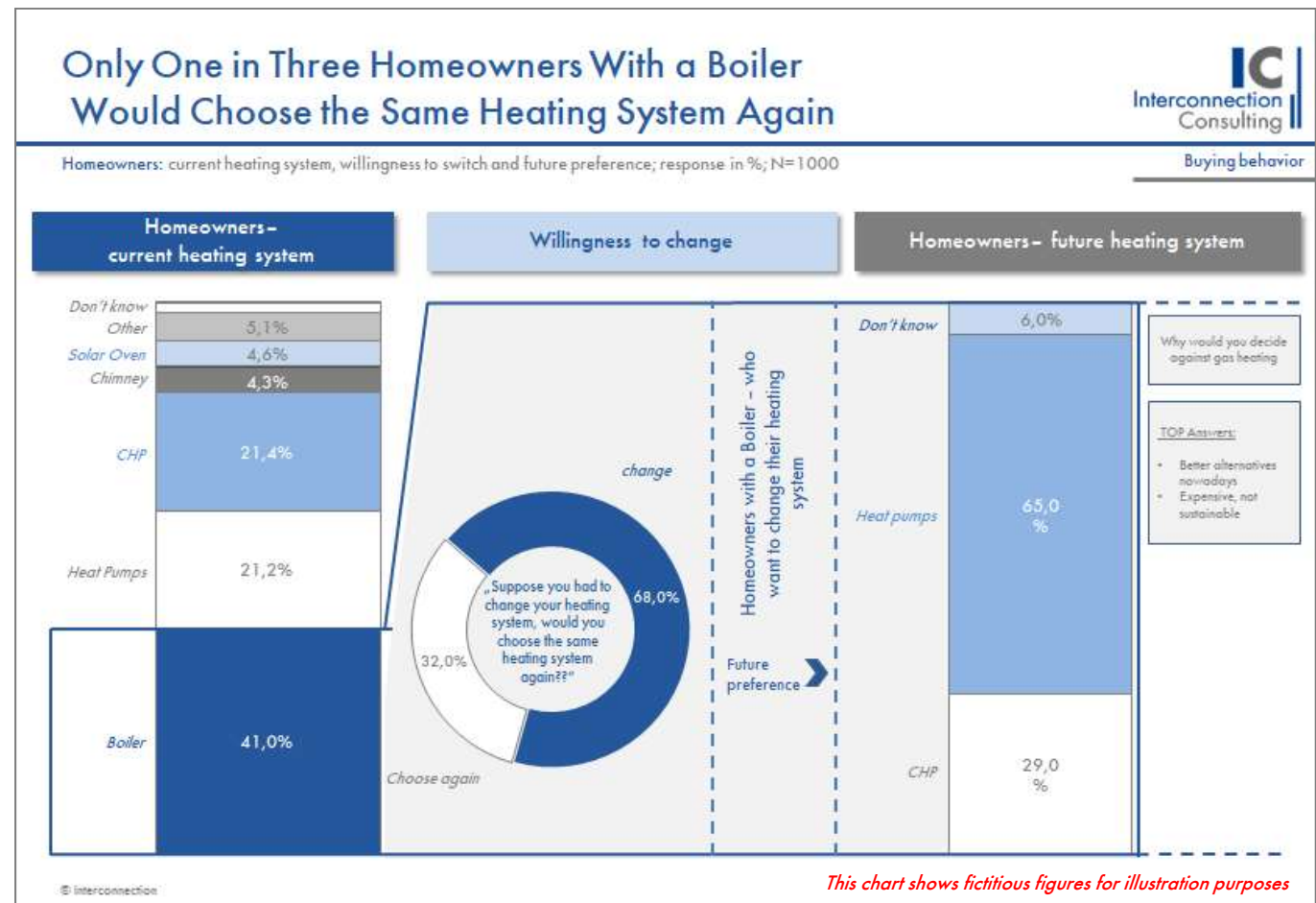


- Analysis of motives and barriers to change the heating systems
- Analysis of possible differentiation possibilities
- Example evaluation:
  - *Heat pumps:*  
energy efficient,  
sustainability
  - *CHP:*  
environmentally friendly,  
inexpensive
  - *Boiler:*  
inexpensive

A detailed survey of current and future usage and the reasons for or barriers to change yields highly valuable insights regarding motives, market drivers and long-term trends!

# What is the Percentage of the Different Types of Heating Systems?

- Analysis of the proportion of different Types of Heating Systems (Heat Pumps, Boiler, CHP, etc.), as well as future customer preferences and purchasing criteria/barriers.
- *This example chart shows fictitious numbers.*



# How Satisfied Are Customers With Their Heat Pump?

Sample Chart

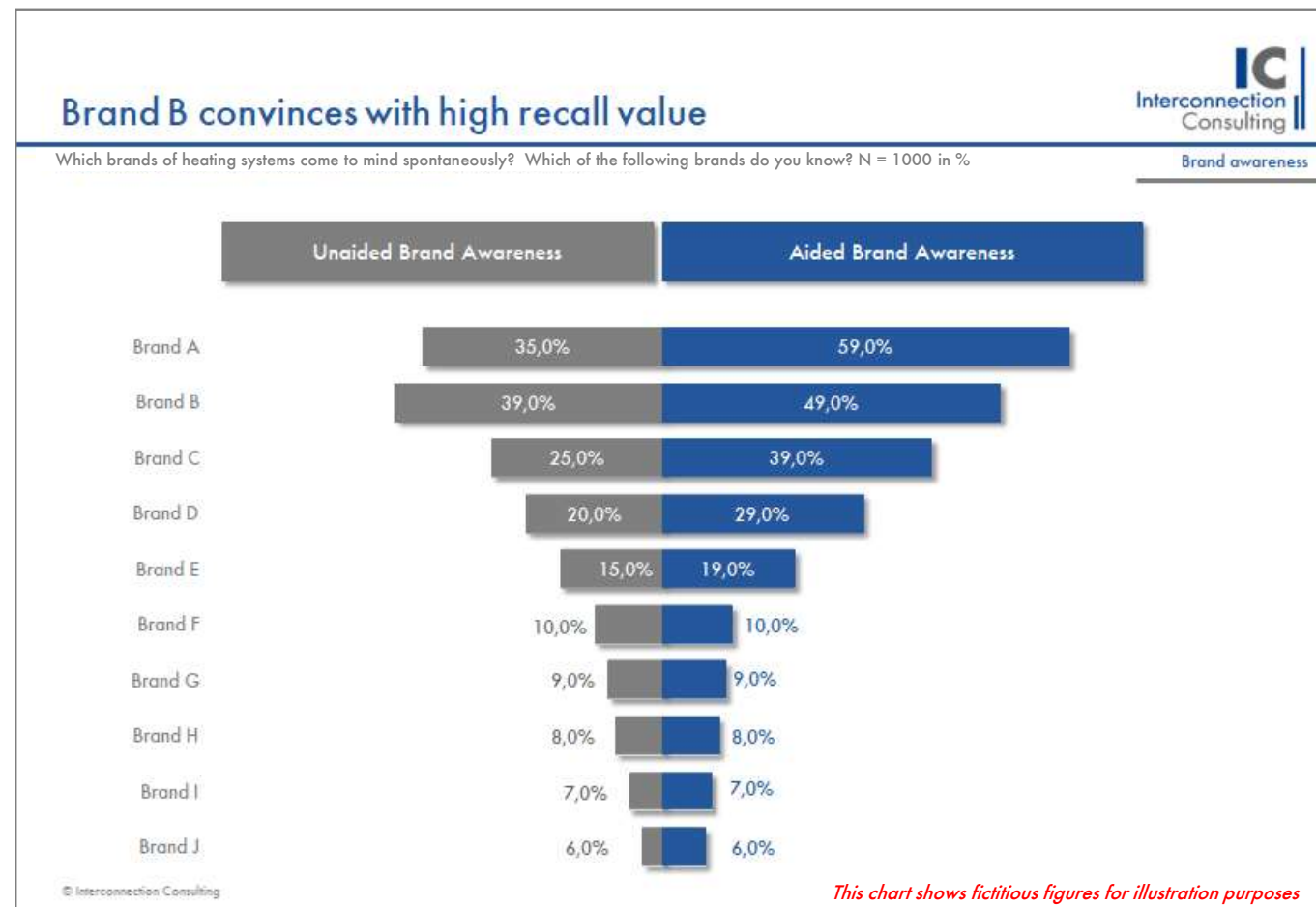
- Analysis of customer satisfaction and the image of different types of energy sources and heating systems.
- *This example chart shows fictitious numbers.*





# Brand Awareness Analysis of TOP Brands

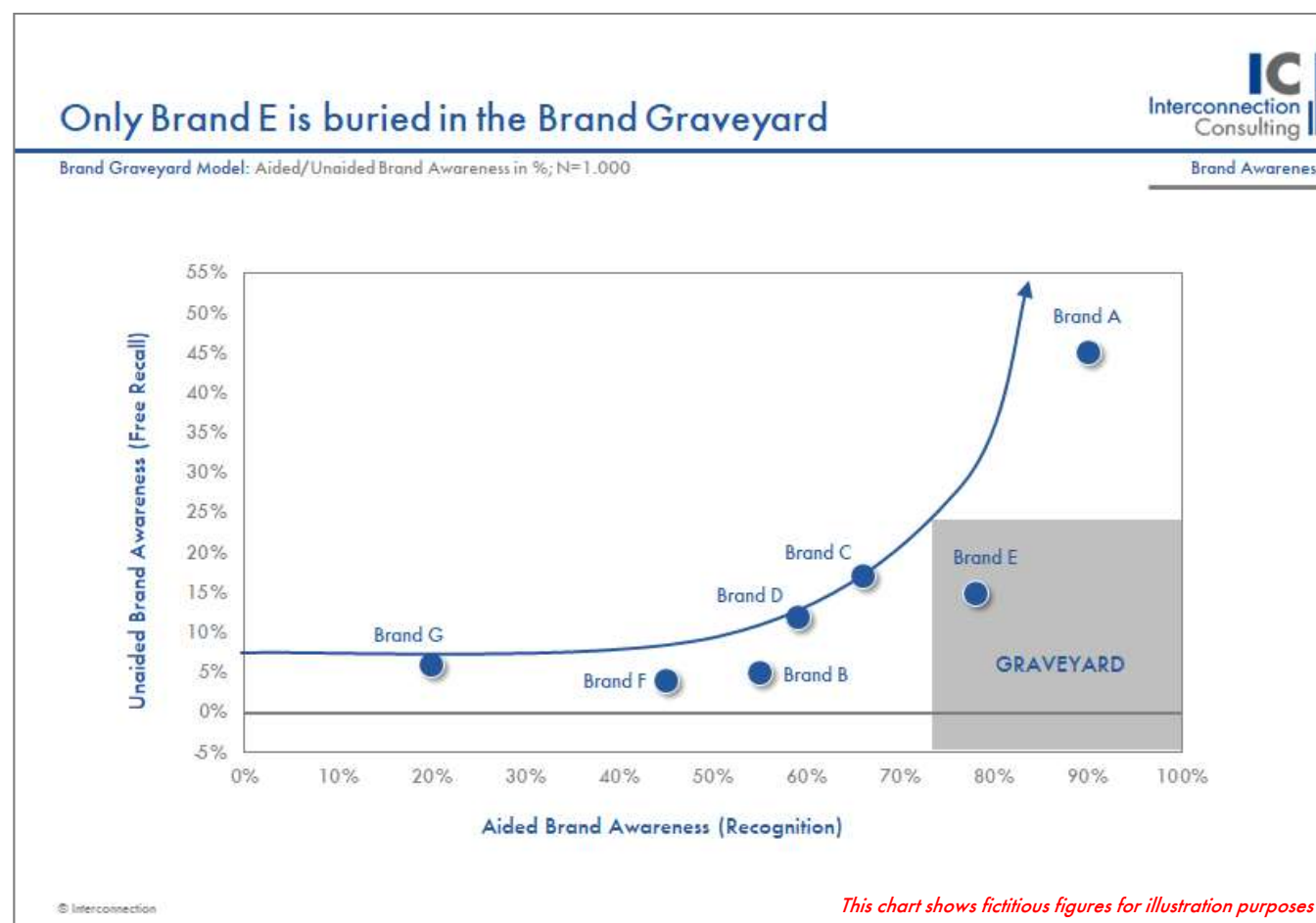
- Classic analysis of brand awareness according to recall and recognition values.
- *This example chart shows fictitious numbers.*



# Which Brand is Located in the Brand Graveyard?

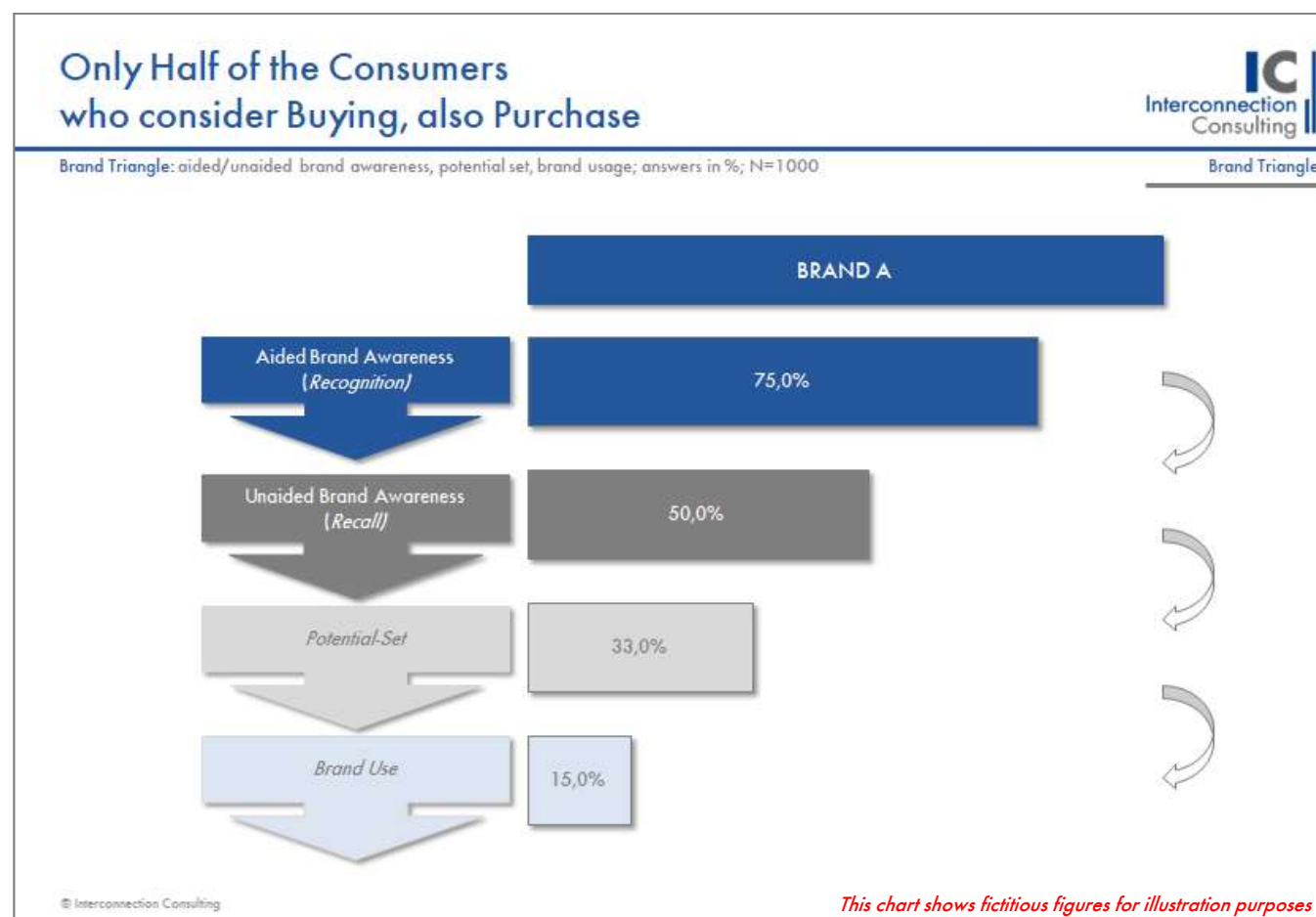
Sample Chart

- Strategic analysis of brand equity using the Brand-Graveyard Models.
- *This example chart shows fictitious numbers.*



# Analysis of Brand Values of the TOP Brands

- Analysis of brand awareness based on aided and unaided awareness as well as inferior and superior brands, potential set and actual brand usage.
- *This example chart shows fictitious numbers.*



# Investment Plan

## Customer Behavior for Heating in EU 2022

IC Customer-Insight® Heating in EU 2022	IC Subscription*	IC Single Issue
GER, FRA, AUT, NED (N=3.000)	€ 19.900,-	+25% for Single Issues
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France (N=1.000)	€ 5.900,-	
Austria (N=500)	€ 4.900,-	
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Price includes an interactive PDF in electronic form. All prices shown exclude sales tax.

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*„Long experience and deep understanding of construction markets define the quality of IC Studies.“*

Mr. Bernd Blümmers  
General Manager, Saint-Gobain Solar Systems Central Europe



# Interconnection Provides Data for Corporate Decisions



# Our Market-Intelligence Tools





# Contact Information

If there are any questions please  
do not hesitate to contact us!

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## According to the offer we order...

(Please, print out the order form and mark your desired products)

### Customer Insight® Heating 2022

- ☐ *Subscription – 4 countries GER, FRA, NED, AUT – Price per year: ..... EUR 19.900,-*
- ☐ *Germany Subscription – Price per year: ..... EUR 5.900,-*
- ☐ *France Subscription – Price per year: ..... EUR 5.900,-*
- ☐ *Austria Subscription – Price per year: ..... EUR 4.900,-*
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Mag. Panorea Kaskani – [kaskani@interconnectionconsulting.com](mailto:kaskani@interconnectionconsulting.com) – Tel.: +43 1 585 46 23 - 27

# Order Form

## Billing Address: (please fill in the data completely)

Company: \_\_\_\_\_  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Post Code/Zip: \_\_\_\_\_  
Country: \_\_\_\_\_  
VAT identification number: \_\_\_\_\_  
E-Mail: \_\_\_\_\_

## Delivery Address: (necessary if different from the billing address )

Company: \_\_\_\_\_  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Post Code/Zip: \_\_\_\_\_  
Country: \_\_\_\_\_  
  
E-Mail: \_\_\_\_\_

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Date

Name

Signature

### \*Subscription:

The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before 31<sup>st</sup> December. The subscription can be cancelled after two purchases of the study, but not later than 31<sup>st</sup> December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year.

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