2024 Profile

of the Electrical Contractor

Electrical Contractors: Their Purchase and Rental/Lease of Construction Site Tools and Equipment

Special Report by Renaissance Research & Consulting, New York, for ELECTRICAL CONTRACTOR, January 2025

2024 "ELECTRICAL CONTRACTOR MAGAZINE PROFILE"
DATABASE REPORT

ELECTRICAL CONTRACTORS:

THEIR PURCHASE AND RENTAL/LEASE OF:

CONSTRUCTION SITE TOOLS AND EQUIPMENT

HAND TOOLS
POWER TOOLS
MEASURING TOOLS (INCLUDING DIGITAL)
FISHING TOOLS
PIPE THREADERS/BENDERS/CUTTERS
CABLE PULLERS
AERIAL LIFTS AND SCAFFOLDING
DIGGING/HDD/ BORING EQUIPMENT
CRANES
MOBILE OFFICE SPACE
PORTABLE GENERATORS
TRAILERS (TO HAUL EQUIPMENT)
PERSONAL PROTECTIVE EQUIPMENT/APPAREL
JOB-SITE SAFETY EQUIPMENT
TEMPORARY JOB-SITE LIGHTING
TEMPORARY POWER
SURVEYING TOOLS
WEARABLE TECHNOLOGY
ROBOTS

INCLUDING ESTIMATES BASED ON THE 2022 COUNTY BUSINESS PATTERNS

A SPECIAL REPORT PREPARED BY
RENAISSANCE RESEARCH & CONSULTING, INC.

FOR:

WASHINGTON, DC 20004

JANUARY 2025

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KEY FINDINGS

This report is volume one of a two-volume report covering 28 different types of tools and equipment. The second volume also covers use of electronic devices and software. Pages 1 through 4, the Methodology and pages 6 through 14 are common to both reports.

PURCHASE AND RENTAL/LEASE BEHAVIOR OVERVIEW:

Tools and Equipment **Purchased** in 2023

Nine in ten electrical contractors (92%) reported purchasing the 28 tools and equipment included in this survey in 2023, statistically unchanged from two years earlier. As shown on the next page, the list of tools and equipment types is quite wide. Further, higher percentages made purchases in *multiple* categories—2+, 4+ and 6+ compared with two years earlier, suggesting strength and momentum in this category.

- In general, larger companies—those with 10+ employees and/or companies that work primarily on CII projects—tend to be more likely to make purchases in multiple categories.

In 2023, Hand tools and Power tools continue to top the list at around 80%+ each, followed distantly by Electrical testers, multimeters, Measuring tools (including digital), Fishing tools and Personal protective equipment, including apparel and accessories, at around 68% to 60%.

About 5 in 10 electrical contracting firms reported a 2023 purchase of: Phones (smart/mobile/cell or two-way radios/push to talk) and Labeling/identification (cable/panel),

About four in 10 electrical contracting firms reported a 2023 purchase of: Pipe threaders, benders, cutters, Job-site safety equipment, Tablets or portable reading devices and and Temporary job-site lighting.

Between about 30% and 20% reported a 2023 purchase of Temporary power, Cable pullers, Portable generators, LAN, datacom, other low-voltage, and Thermal imaging

18% to 12% of electrical contracting firms reported a 2023 purchase of: Wearable technology, Trailers (to haul equipment/materials), Aerial lifts/scaffolding and Digging/HDD/boring equipment.

10% or less of electrical contracting firms reported a 2023 purchase of Surveying tools, Drones, Mobile office space (construction trailers), 3D scanners, 3D printers, Cranes, Robots.

On the next page, there is a table showing the percentage of firms purchasing each of the 28 tools and equipment included in this survey. As shown on the page after that, for many of the items, purchasing is higher among larger firms and/or firms whose revenue comes primarily from CII projects. (There is a great deal of overlap between larger firms and firms working primarily on CII projects.}

PURCHASE OF TOOLS AND EQUIPMENT Trended									
V3, Q 14A, T74 1(Trend p.211)	**In 2023**		**In 2021**		**In 2019**		**In 2017**		**In 2015**
	Total		**Total**		**Total**		**Total**		**Total**
Bolded numbers denote and arrows significant differences at the 90% level of confidence	(158)		(106)		(236)		(234)		(376)
	%		%		%		%		%
"Any" Purchase …	92	=	87	=	84	=	81	>	79
Hand tools	**86**	>	74	=	74	=	70	=	70
Power tools	82	=	75	=	68	=	66	=	70
Electrical testers, multimeters, etc.	**68**	>	53	=	**55**	>	45	=	46
Measuring tools (including digital) (first asked in 2020 Profile Study)	**66**	>	52	=	49		N/A		N/A
Fishing tools (first asked in 2020 Profile Study)	**61**	>	47	=	46		N/A		N/A
Personal protective equipment, including apparel and accessories	**60**	>	44	=	43	=	**42**	>	31
Phones: smart/mobile/cell or two-way radios/push-to-talk	55	=	47	=	43	=	37	=	37
Labeling/identification (cable/panel)	**54**	>	40	=	36	=	**34**	>	22
Pipe Threaders, benders, cutters	41	=	36	=	35	=	**28**	>	22
Job-site safety equipment	40	=	35	=	34	=	28	=	26
Tablets or portable reading devices	**39**	>	27	=	31	=	**24**	>	16
Temporary job-site lighting (first asked in 2016)	**35**	>	23	=	26	=	**23**	>	15
Temporary power (first asked in 2022)	32	=	26		NA		NA		NA
Cable pullers (first asked in 2014 Profile Study)	31	=	24	=	25	=	**19**	>	10
Portable generators (first asked in 2016 Profile Study)	**29**	>	16	=	19	=	16	=	19
LAN, datacom, other low-voltage	25	=	25	=	**22**	>	**14**	>	9
Thermal imaging (first asked in 2014)	22	=	19	=	12	=	10	=	8
Wearable technology (first asked in 2022)	18	=	14		NA		NA		NA
Trailers (to haul equipment/materials) (first asked in 2016)	16	=	18	=	17	=	12	=	9
Aerial lifts/scaffolding	13	=	10	=	**11**	>	**6**	<	10
Digging/HDD/boring equipment	**12**	>	5	=	**9**	>	4	=	7
Surveying tools (first asked in 2022)	10	=	14		NA		NA		NA
Drones (first asked in 2018 Profile Study)	8	=	7	=	**5**	>	2		N/A
Mobile office space (construction trailers) (first asked in 2016 Profile Study)	7	=	3	=	5	=	3	=	4
3D scanner (first asked in 2018 Profile Study)	4	=	7	=	5	=	2		N/A
3D printer (first asked in 2020 Profile Study)	3	=	8	=	4		N/A		N/A
Cranes (first asked in 2016 Profile Study)	3	=	2	=	3	=	1		2
Robots (first asked in 2022)	1	=	3		NA		NA		NA

This table shows where purchases are statistically significantly higher by company size and by the firm's *__primary__* source of revenue – residential vs. CII.

The exact numbers are shown in the Detailed Findings. This table is meant to show the broad patterns that we observed.

PURCHASE OF TOOLS AND EQUIPMENT In 2023									
			Number of Employees				Primary Type of Work		
V3, Q 14A, T74 1(Trend p.211)	**Total**		**1-9**		**10+**		**Res**		**CII**
Bolded numbers denote and arrows significant differences at the 90% level of confidence	(158)		(89)		(68)*		(64)*		**(76)**
	%								
__“Any”__ __Purchase …__	92			<				=	
Hand tools	**86**			=				=	
Power tools	82			<				=	
Electrical testers, multimeters, etc.	**68**			<				<	
Measuring tools (including digital) (first asked in 2020 Profile Study)	**66**			<				<	
Fishing tools (first asked in 2020 Profile Study)	**61**			<				<	
Personal protective equipment, including apparel and accessories	**60**			<				<	
Phones: smart/mobile/cell or two-way radios/push-to-talk	55			<				<	
Labeling/identification (cable/panel)	**54**			<				<	
Pipe Threaders, benders, cutters	41			<				<	
Job-site safety equipment	40			<				<	
Tablets or portable reading devices	**39**			<				<	
Temporary job-site lighting (first asked in 2016)	**35**			<				<	
Temporary power (first asked in 2022)	32			<				<	
Cable pullers (first asked in 2014 Profile Study)	31			<				<	
Portable generators (first asked in 2016 Profile Study)	**29**			<				<	
LAN, datacom, other low-voltage	25			<				<	
Thermal imaging (first asked in 2014)	22			<				<	
Wearable technology (first asked in 2022)	18			=				=	
Trailers (to haul equipment/materials) (first asked in 2016)	16			<				<	
Aerial lifts/scaffolding	13			<				<	
Digging/HDD/boring equipment	**12**			=				=	
Surveying tools (first asked in 2022)	10			<				<	
Drones (first asked in 2018 Profile Study)	8			<				<	
Mobile office space (construction trailers) (first asked in 2016 Profile Study)	7			<				<	
3D scanner (first asked in 2018 Profile Study)	4			=				=	
3D printer (first asked in 2020 Profile Study)	3			=				=	
Cranes (first asked in 2016 Profile Study)	3			<				<	
Robots (first asked in 2022)	1	=		=				=	

*Caution—small base

Tools and Equipment Rented/Leased in 2023

In 2023, as was the case in 2021, 2019 and in 2017, about six in ten electrical contractors (58%) rented/leased equipment. Note that in 2015 and in 2013 (not shown), the rental/lease rate was substantially and signficantly lower -- in the 37% to 40% range.

Nevertheless, as has been the case in recent Profile studies, fewer electrical contractors continue to obtain tools and equipment through rental/lease (58%) than through outright purchase (92%).

Construction Site Equipment

Construction Site Equipment is one of the few categories where some equipment is more likely to be obtained through *rental/lease* than through *purchase*. Specifically, far more electrical contracting firms continue to obtain Aerial lifts/scaffolding, Digging/HDD/boring equipment, and Cranes and Mobile office space (trailers) through *rental/lease* than through *purchase.*

- Trailers to haul equipment are about equally likely to be obtained through Rental/lease or by purchase.

- In contrast, Personal protective equipment, Temporary power, Job-site safety equipment, Temporary job-site lighting and Portable generators are far more likely to be purchased rather than rented/leased.

  NB: Bolding for emphasis; stat testing doesn't make sense because the sample that rented/leased overlaps with the sample that made purchases.

2023 Rental/Lease to Purchase Comparison		
	Rental/Lease	**Purchase**
	2023	**2023**
	(158)	(158)
	%	**%**
"Any" Purchase/Lease …	58	92
Aerial lifts/scaffolding	**46**	13
Digging/HDD/boring equipment	**33**	12
Cranes	**24**	3
Mobile office space (trailers)	**21**	7
Trailers (to haul equipment/materials)	14	16
Personal protective equipment, including apparel and accessories	1.3	**60**
Temporary power	6	**32**
Job-site safety equipment	8	**40**
Temporary job-site lighting	8	**35**
Portable generators	12	29

- 44% of the electrical contractors surveyed rent/lease in multiple (2+ categories). As was the case regarding purchasing behavior, larger firms and/or those whose revenue comes parimarily from CII projects tend to be more likely to rent/lease in multiple categories.

METHODOLOGY

This report focuses on electrical contractors' purchase and rental/lease of hand tools and power tools and construction site equipment. While no new types of tools and equipment were added in 2024, in 2022, four new categories were included: Robots, Surveying tools, Temporary power and Wearable technology. Please note that the Profile study is conducted in even years (2024 or 2022) and asks about the previous year (2023 or 2021).

The survey was conducted by internet among subscribers to ELECTRICAL CONTRACTOR magazine. In addition, in 2024, as was the case in 2018 through 2022, about 100 members of the ELECTRICAL CONTRACTOR Subscriber Research Panel also participated in the survey. The field period for the survey began on January 24, 2024, and ran through March 31, 2024. A total of 828 participants completed the survey in that time.

Each respondent who received the survey through the internet was sent up to seven follow-up emails. An incentive was offered for participation in the survey: For each completed survey, ELECTRICAL CONTRACTOR would contribute $5 to charity, up to a total of $10,000. In addition, in 2024, as was the case since 2018, the magazine also offered a sweepstakes drawing for a chance to win one of ten $150 Amazon e-gift cards. In 2018 and 2020, the drawing was for one of five $150 Amazon e-gift cards.

The internet option was first introduced in 2004.

As was the case since 2004, the survey was produced in different versions. Starting with the 2008 Profile study, there were four versions of the survey, which differed from each other on fewer than 10 questions. The first 30 questions were common to all versions. Since 2018, there have been 7 versions.

This report and its companion report are drawn from Versions 3—tools and equipment used, purchased, rented/leased—and from Version 8—business activities conducted in-house, using a computer—and use/ownership and planned acquisition of electronic devices. The base sizes of those version are as follows: Version 3 has a base size of 158 and Version 8 has a base size of 142.

As in the past, statistical testing was done at the 90% level of confidence.

This research was conducted by New York, NY-based Renaissance Research & Consulting, Inc. (www.renaiss.com), an independent marketing research firm that has, as one of its specialties, market research for the construction industry.

DETAILED FINDINGS: Tools and Equipment Purchase and Rental/Lease Overview

Percent That Purchase Different Types of Tools and Equipment

Nine in ten electrical contractors (92%) reported purchasing tools and equipment in 2023, statistically unchanged from two years earlier.

In 2023, Hand tools and Power tools continue to top the list at around 80%+ each, followed distantly by Electrical testers, multimeters, Measuring tools (including digital), Fishing tools and Personal protective equipment, including apparel and accessories, at around 68% to 60%.

About 5 in 10 electrical contracting firms reported a 2023 purchase of: Phones (smart/mobile/cell or two-way radios/push to talk) and Labeling/identification (cable/panel),

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18% to 12% of electrical contracting firms reported a 2023 purchase of: Wearable technology, Trailers (to haul equipment/materials), Aerial lifts/scaffolding and Digging/HDD/boring equipment.

10% or less of electrical contracting firms reported a 2023 purchase of Surveying tools, Drones, Mobile office space (construction trailers), 3D scanners, 3D printers, Cranes, Robots.

As shown on the next page, the reported purchase of 10 of the 28 types of tools and equipment posted a statistically significant increase between 2021 and 2023 with the other categories remaining unchanged. None showed a statistically significant decline between 2021 and 2023.

PURCHASE OF TOOLS AND EQUIPMENT									
V3, Q 14A, T74 1(Trend p.211)	**In 2023**		**In 2021**		**In 2019**		**In 2017**		**In 2015**
	Total		**Total**		**Total**		**Total**		**Total**
Bolded numbers denote and arrows significant differences at the 90% level of confidence	(158)		(106)		(236)		(234)		(376)
	%		%		%		%		%
“Any” Purchase …	92	=	87	=	84	=	81	>	79
Hand tools	**86**	>	74	=	74	=	70	=	70
Power tools	82	=	75	=	68	=	66	=	70
Electrical testers, multimeters, etc.	**68**	>	53	=	**55**	>	45	=	46
Measuring tools (including digital) (first asked in 2020 Profile Study)	**66**	>	52	=	49		N/A		N/A
Fishing tools (first asked in 2020 Profile Study)	**61**	>	47	=	46		N/A		N/A
Personal protective equipment, including apparel and accessories	**60**	>	44	=	43	=	**42**	>	31
Phones: smart/mobile/cell or two-way radios/push-to-talk	55	=	47	=	43	=	37	=	37
Labeling/identification (cable/panel)	**54**	>	40	=	36	=	**34**	>	22
Pipe Threaders, benders, cutters	41	=	36	=	35	=	**28**	>	22
Job-site safety equipment	40	=	35	=	34	=	28	=	26
Tablets or portable reading devices	**39**	>	27	=	31	=	**24**	>	16
Temporary job-site lighting (first asked in 2016)	**35**	>	23	=	26	=	**23**	>	15
Temporary power (first asked in 2022)	32	=	26		NA		NA		NA
Cable pullers (first asked in 2014 Profile Study)	31	=	24	=	25	=	**19**	>	10
Portable generators (first asked in 2016 Profile Study)	**29**	>	16	=	19	=	16	=	19
LAN, datacom, other low-voltage	25	=	25	=	**22**	>	**14**	>	9
Thermal imaging (first asked in 2014)	22	=	19	=	12	=	10	=	8
Wearable technology (first asked in 2022)	18	=	14		NA		NA		NA
Trailers (to haul equipment/materials) (first asked in 2016)	16	=	18	=	17	=	12	=	9
Aerial lifts/scaffolding	13	=	10	=	**11**	>	**6**	<	10
Digging/HDD/boring equipment	**12**	>	5	=	**9**	>	4	=	7
Surveying tools (first asked in 2022)	10	=	14		NA		NA		NA
Drones (first asked in 2018 Profile Study)	8	=	7	=	**5**	>	2		N/A
Mobile office space (construction trailers) (first asked in 2016 Profile Study)	7	=	3	=	5	=	3	=	4
3D scanner (first asked in 2018 Profile Study)	4	=	7	=	5	=	2		N/A
3D printer (first asked in 2020 Profile Study)	3	=	8	=	4		N/A		N/A
Cranes (first asked in 2016 Profile Study)	3	=	2	=	3	=	1		2
Robots (first asked in 2022)	1	=	3		NA		NA		NA

Bolded numbers denote and arrows significant differences at the 90% level of confidence

Purchase in Multiple Categories

As has been the case in earlier Profile studies, in 2023, the bulk of electrical contractors made purchases in *multiple* categories (92% in 2023), statistically unchanged compared to two years ago.

- However, a statistically significantly higher percentage of electrical contractors reported making purchases in 2+, 4+ and 6 or more tools and equipment categories in 2023 compared with 2021.

PURCHASE IN MULTIPLE CATEGORIES

V3, Q 14A, T74 (Trend p.216)	**In 2023**		**In 2021**		**In 2019**		**In 2017**		**In 2015**		**In 2013**
	Total		**Total**		**Total**		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)		(376)		(374)
	%		%		%		%		%		%
Any Purchase	92**	=	87	=	84	=	81	=	79	<	**84**
Purchased Only 1 Category	2	=	4	=	5	=	6	=	5	=	3
Purchase in **Multiple** (2+) Categories	91	>	83	=	79	=	75	=	**74**	<	**81**
Purchased in 2 – 3 Categories	11	=	16	=	13	<	22	=	21	=	20
Purchase in **4+** Categories	80	>	67	=	66	>	53	=	53	<	61
Purchased in 4 – 5 Categories	12	=	9	=	13	=	16	=	18	=	19
Purchased in 6+ Categories	**68**	>	58	=	53	>	37	=	**35**	<	**42**
Purchased in 6-8 Categories	20	=	20	=	17		--		--		--
Purchased in 9+ Categories	48	(>)	38	=	36		--		--		--

** Difference due to rounding

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

(>) Just short of statistical significance

Purchase in Multiple Categories, continued

By number of employees: Those in larger firms (10+ employees) were significantly more likely to have made Any Purchase, especially in 4+, 6+ categories and 9 + categories.

- By contrast, firms with 1-9 employees are more likely than their larger counterparts to have made 2-3 category purchases.

By primary type of work: Firms that work on primarily residential projects are more likely to have purchased in only a single category in 2023, while firms working primarily on CII projects are significantly more likely to have made purchases in 4+, 6+ and 9+ categories.

	PURCHASE IN MULTIPLE CATEGORIES (2023)				
		Number of Employees		Work Primarily In	
	Total	**1-9**	**10+**	**Residential**	**CII**
	(158)	(89)	(68)*	(64) *	(76)
	%	**%**	**%**	**%**	**%**
Any Purchase	92	89	<97	89 =	95
Purchased Only 1 Category	2	**2**	2	**5>**	0
Purchase in **Multiple** (2+) Categories	91	87	<96	85	<95
Purchased in 2 – 3 Categories	11	**17 >**	3	16>	7
Purchase in **4+** Categories	80	70	**<93**	69	<89
Purchased in 4 – 5 Categories	12	**17 >**	6	16	11
Purchased in 6+ Categories	**68 >**	53	**< 87**	53	<78
Purchased in 6-8 Categories	20	30	7	27>	13
Purchased in 9+ Categories	48	23	**< 80**	27	**< 65**

V3, Q 14A, T741 (Trend), B; B2, p

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

Among the total sample: There are no statistically significant differences between 2023 and 2021 in the table shown below terms of Any Purchase. However, more electrical contractors made multiple category purchases (2+, 4+, 6+ but not 9+) in 2023 compared with 2021.

Among firms with 1-9 employees: There are no statistically significant differences between 2023 and 2021 in the table shown below. Substantially more respondents made 4+ purchases, although the difference is just short of statistical significance.

Among firms with 10+ employees: Firms with 10+ employees are significantly more likely to have made Any category purchase of tools and equipment and to have made purchases in multiple categories (2+, 4+, 6+ and 9+).

PURCHASE in MULTIPLE CATEGORIES (By Firm Size)												
	Total Sample				**1-9 Employees**				**10+ Employees**			
	2023	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**
	(158)	(106)	(236)	(234)	(89)	(58)*	(150)	(162)	(68)*	(48)*	(85)	(71)
	%	%	%	%	%	%	%	%	%	%	%	%
Any Purchase	92 **=	87	84	81	89	88	83	78	**97>**	85	87	87
Only 1 Category	2	4	5	6	2 =	7	**7**	9	2	0	1	0
In **Multiple Categories**	**91>**	83	79	75	87 =	81	75	69	**96>**	85	86	87
In 2 – 3 Categories	11	16	13	**< 22**	17 =	24	18	**< 27**	3	6	5	10
In **4+** Categories	80>	67	**66>**	53	70 (>)	57	**57>**	42	93>	79	81	77
In 4 – 5 Categories	12	9	13	16	17=	12	15	18	6	6	8	11
In 6+ Categories	**68 >**	58	**53>**	37	53=	45	**42>**	24	**87 >**	73	73	66
In 6-8 Categories	20	20	17	--	30=	22	19	--	7	17	14	--
In 9+ Categories	48 (>)	38	36	--	23=	22	23	--	**80 >**	56	59	

** Difference due to rounding

V3, Q 14A, T741(Trend

(>) The difference is just short of statistical significance at the 90% level of confidence

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Percent That Rent/Lease Different Types of Tools and Equipment

In 2023, as was the case in 2021, 2019 and in 2017, about six in ten electrical contractors (58%) rented/leased equipment. Note that in 2015 and 2013, (not shown) the rental/lease rate was substantially and signficantly lower—in the 37% to 40% range.

Nevertheless, as has been the case in recent Profile studies, fewer electrical contractors continue to obtain tools and equipment through rental/lease (58%) than through outright purchase (92%).

As was also the case two and four years ago, in addition to Aerial lifts/scaffolding and Digging/HDD/boring equipment, Cranes and Mobile office space (trailers) are the only four categories that are more likely to be obtained through rental/lease than through purchase. All are statistically unchnaged compared to two years earlier.

Aerial Lifts/scaffolding and Digging/HDD/boring equipment continue to be the two categories that are obtained through rental/lease most often. Both are statistically unchanged compared to two years earlier.(There was also no statistically significant change between 2019 and 2017 on this measure.)

- Compared with two years earlier, rental/lease levels are unchanged for all of the 28 categories of tools and equipment with the exception of Measuring tools where it declined from 6% in 2021 to 0% in 2023.

RENTAL/LEASE OF TOOLS AND EQUIPMENT									
	In 2023		**In 2021**		**In 2019**		**In 2017**		**In 2015**
	Total		**Total**		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)		(376)
	%		%		%		%		%
“Any” Lease/Rental…	58	=	61		60	=	**57**	>	37
Aerial lifts/scaffolding	46		48		45	=	**46**	>	28
Digging/HDD/boring equipment	33		30		34	=	**28**	>	12
Cranes	24		23		**25**	>	**17**	>	6
Mobile office space (trailers)	21		20		14	=	**12**	>	6
Trailers (to haul equipment/materials)	14		12		9	=	8	>	3
Portable generators	12		15		13	=	**11**	>	4
Temporary job-site lighting	8		**10**	>	5	=	4	=	2
Job-site safety equipment	8		4		7	=	6	>	1
Cable pullers	7		7		8	=	**8**	>	3
Power Tools	6		9	=	**12**	>	**8**	>	4
Thermal imaging	6		7		5	=	**4**	>	1
Temporary power	6		8		NA		NA		NA
Electrical testers, multimeters, etc.	**5**		**9**	>	3	=	4	=	2
Drones	4		1.9		1.7	=	0.4		N/A
Surveying tools	4		7		NA		NA		NA
Hand tools	3.2		8		6	=	4	=	2
3D scanner	3		6	=	2.1	=	1.6		N/A
Pipe threaders, benders, cutters	3		4		6	=	5	>	2
LAN, datacom, other low-voltage	3		3	=	2	=	**2.8**	>	0.6
Robots	1.9		1.9		NA		NA		NA
3D printer	1.3		4		2		N/A		N/A
Phones: smart/mobile/cell or two-way radios/push-to-talk	1.3		3	=	3	=	**3**	>	0.8
Personal protective equipment, including apparel and accessories	1.3		2		3	=	2	=	0.6
Tablets or portable reading devices	1.3		1.9		1.7	=	0.4	=	1
Wearable technology	1.3		1.9		NA		NA		NA
Fishing tools	1		0	<	**3**		N/A		N/A
Software	NA		NA		4.2	=	**2.6**	>	0.9
Measuring tools (including digital)	**0**	<	**6**	>	1.7		N/A		N/A
Labeling/identification (cable/panel)	0		0	<	**1.3**	=	0.4	=	0.6

V3, Q 14A, T75 (Trend p.218), B1, p 250, B2, p259

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

Rental/Lease in Multiple Categories

Among the total sample, 44% of electrical contractors rented/leased in two or more categories, statistically unchanged from the 40% observed two years ago.

- While fewer electrical contractors rented/leased in a single category, there is no statistically significant difference in the overall percentages that rented/leased in 2+ or 3+ categories.

RENTAL/LEASE IN MULTIPLE CATEGORIES									
	2023		**2021**		**2019**		**2017**		**2015**
	(158)		(106)		(236)		(234)		(376)
	%		%		%		%		%
Any Lease/Rental	58		61	=	60	=	**57**	>	37
Only 1 Category	**13**	<	22	>	14	=	16	=	18
Lease/Rent in **Multiple/2+** Categories	44	=	40	=	46	=	**41**	>	19
In 2 Categories	**14**	>	8	=	13	=	**14**	>	8
In 3+ Categories	30	=	32	=	**33**	=	**27**	>	11

V3, Q 14A, T751 (Trend1)

- As was the case two years ago, larger electrical contracting companies are more likely than smaller electrical contractors to have leased/rented tools and equipment at all ("any") and also in the multiple categories of 2+ and 3+ types of tools and equipment.
- As was also the case two years ago, a higher percentage of firms that work primarily on CII projects have rented/leased at all ("any") and in the multiple categories of 2+ and 3+ types of tools and equipment compared with firms working primarily on residential projects.
    - As noted in the past, we believe that this is due to the larger companies being involved in larger, more complex and sophisticated projects that require *more different types* of tools and equipment.

	In 2023					
		Number of Employees			**Work Primarily In**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Any Lease/Rental	58	38	**< 82**		42 =	67
Only 1 Category	13	15	12		13	13
Lease/Rent in **Multiple /2+** Categories	44	24	**<71**		29	<54
In 2 Categories	14	10	19		14	15
In 3+ Categories	30	14	**< 52**		16	**<39**

V3, Q 14A, T751 B1 and B2

* Caution: small base

Lease/Rental in Multiple Categories, continued

Trended: In 2023, across the total sample, electrical contractors are less likely to have rented/leased in only a single category than was the case two years ago. There are no differences by number of employees on this measure.

RENTAL/LEASE in MULTIPLE CATEGORIES (By Firm Size)												
	Total Sample				**1-9 Employees**				**10+ Employees**			
	2023	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**
	(158)	**(106)**	**(236)**	**(234)**	(89)	(58)*	(150)	(162)	(68)*	(50)*	(85)	(71)
	%	%	%	%	%	%	%	%	%	5	%	%
"Any" Lease/Rental	58	61	60	**57**	38 =	45	51	**47**	82	81	75	**81**
Only 1 Category	**13 <**	**22 >**	14	16	15 =	**26 >**	15	17	12 =	17	12	13
Lease/Rent in Multiple/2+ Categories	44	40	46	**41**	24	19	**< 37**	**30**	71 =	64	64	**68**
In 2 Categories	14	8	13	**14**	10	5	**< 12**	12	19 =	10	14	**19**
In 3+ Categories	30	32	33	**27**	14	14	**< 25**	**18**	52	54	49	**49**

V3, Q 14A, T75 (Trend p.223)

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Tools:

Hand Tools Purchase and Rental/Lease Behavior

86% of respondent firms made a purchase in the Hand tools category in 2023, a statistically significant increase compared with 2021. 3.2% said that their firm obtained Hand tools through rental/lease, statistically unchanged compared with two years earlier.

- In 2023, there were no subgroup differences by number of employees or by primary type of work performed in terms of purchase or rental/lease.

HAND TOOLS (2023 Trended)

	In 2023		In 2021		In 2019		In 2017		In 2015		In 2013
	Total		**Total**		**Total**		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)		(376)		(374)
Purchase Level	**86%**	>	74%		74%	=	**70%**	=	**70%**	<	**77%**
Rental/Lease	3.2%	=	7.5%	=	6.4%	=	3.5%		--		--

Purchase: V3, Q 14A, T74 (Trend p.211); Rent/Lease: V3, Q14A, T75, (Trend p 2218)

- In 2023, there were no subgroup differences by number of employees or by primary type of work performed in terms of purchase or rental/lease.

HAND TOOLS (2023 by Subgroups)

		Number of Employees			Work Primarily In	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Purchase Level	86	85	87		83	87
Rental/Lease	3.2	3.4	2.9		1.6 =	5

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

- As shown on the previous page, hand tools purchase levels increased among the total sample compared with two earlier. In contrast, there is no statistically significant difference in rental/lease levels compared with two years ago among the total sample.

- In terms of subgroups, _purchase_ levels rose among firms with 10+ employees and among firms working primarily on CII projects but are otherwise unchanged among subgroups.

    - _Lease/rental_ levels declined significantly among firms working primarily on residential projects but are otherwise unchanged among subgroups.

HAND TOOLS (2023 By Subgroups Trended)												
	Number of Employees						**Work Primarily In…**					
	1-9			**10+**			**Residential**			**CII**		
	2023	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**
	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	85=	78=	73	87>	69=	78	83	**81**>	66	87>	68	**< 81**
Rental/Lease	3.4=	10=	6.7	2.9	4.2=	5.9	**1.6 <**	11=	7.1	<u>5</u>	4 =	6.0

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Estimates and Projections: Hand Tools

ALL INDUSTRY ESTIMATE OF 2023 FIRMS PURCHASING AND RENTING/LEASING: HAND TOOLS

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Rented
Hand tools	%	#	#
Purchase	86.1	81,842	**70,465**
Rental/Lease	3.2	81,842	**2,618**

Power Tools Purchase and Rental/Lease Behavior

Among the total sample, 82% of the electrical contracting firms interviewed reported making a 2023 *purchase* of Power tools. This purchase level is statistically unchanged from the 2021 purchase level of 75%.

- 5.7% of the electrical contractors interviewed reported *renting or leasing* Power tools in 2023. This is also statistically unchanged compared to two years earlier.

POWER TOOLS (2023 Trended)											
	In 2023		**In 2021**		**In 2019**		**In 2017**		**In 2015**		**In 2013**
	Total		**Total**		**Total**		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)		(376)		(374)
Purchase	82%	=	75%	=	68%	=	66%	=	70%	=	72%
Rental/Lease	5.7%	=	8.5 %	=	12.3%	>	**7.5%**	>	4%	<	**7%**

<u>Purchase:</u> In 2023, firms with 10+ employees are more likely to have purchased power tools compared with firms with 1-9 employees. There is no difference in *purchase* levels by the primary type of work performed.

<u>Rental/Lease</u>: In 2023, there is no difference in *rental/lease* levels by company size or by the primary type of work performed.

POWER TOOLS (2023 by Subgroups)						
	Number of Employees				**Work Primarily In**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Purchase	82	74	**< 91**		77	83
Rental/Lease	6	7.9	2.9		6.3	6.6

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

Compared with two years ago, 2023 *purchase* levels are unchanged among the total sample (as shown on the previous page) and, as shown below, are also unchanged among firms with 1-9 employees. In contrast, purchase levels of power tools increased among firms with 10+ employees compared with two years earlier. There is no difference in purchase levels of power tools compared to two years earlier regardless or the firm's primary source of revenue.

Compared to two years ago, 2023 *rental/lease* levels are also unchanged among the total sample (shown on the previous page), by company size and by primary type of work performed.

POWER TOOLS (2023 By Subgroups Trended)																
	Number of Employees								**Work Primarily In**							
	1-9				**10+**				**Residential**				**CII**			
	2023	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**
	(89)	(58)*	(150)	(162)	(68)*	(48)*	(85)	(71)	(64)*	(36)*	(84)	(81)	(76)	(50)*	(116)	(107)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	74	72 =	63	62	91 >	77	77	76	77=	**72>**	55	67	83 =	72	77	73
Rental/Lease	7.9	8.6	10	5.2	2.9=	8.3 =	17	**13**	6.3 =	11 =	5%	6%	6.6 =	10 =	**18 >**	**10**

* Caution: small base

Bolded **numbers denote significant differences at the 90% level of confidence in the direction of the arrow.**

Estimates and Projections: Power Tools

ALL INDUSTRY ESTIMATE OF NUMBER OF 2023 FIRMS PURCHASING AND RENTING/LEASING: POWER TOOLS

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Power tools	%		
Purchase	81.6	81,842	**66,783**
Rental/Lease	5.7	81,842	**4,665**

Measuring Tools (Including Digital) Purchase and Rental/Lease Behavior

66% of the electrical contracting firms surveyed *purchased* Measuring tools (including digital) in 2023; this is a statistical increase from the 2021 level of 52%.

0.06% rented or leased in this category in 2023; this is a large and statistically significant decrease the 5.7% that reported *renting/leasing* Measuring tools in 2021.

MEASURING TOOLS (Including Digital) 2023 TRENDED					
	In 2023		**In 2021**		**In 2019**
	Total		**Total**		**Total**
	(158)		(106)		(236)
Purchase	66%	>	52%	=	49%
Rental/Lease	**0.6%**	<	**5.7%**	>	1.7%

Purchase levels: Purchase levels are significantly higher among larger firms and firms whose revenue comes primarily from CII projects compared to their counterparts.

Rental/lease levels: There is no statistically significant difference in rental/lease levels by the subgroups shown below.

MEASURING TOOLS (INCLUDING DIGITAL) 2023 (By Firm Size and Primary Work Type)						
		Number of Employees			**Work Primarily In**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	**%**	**%**		**%**	**%**
Purchase Level	66	57	**< 77**		56	<71
Rental/Lease	0.6	0 =	1.5		0 =	1.3

* Caution: small base

Bolded **numbers denote significant differences at the 90% level of confidence in the direction of the arrow**

Trended Results

- Purchase levels of Measuring tools increased compared with two years ago among the total sample, by firms with 10+ employees and among firms working primarily on CII projects.

- Rental/lease levels of Measuring tools posted a significant decline among the total sample and among firms with 1-9 employees but was statistically unchanged among firms with 10+ employees and by primary type of construction performed.

MEASURING TOOLS (Including Digital) 2023 Trended

				Number of Employees						Work Primarily In					
	Total			1-9			10+			Residential			CII		
	2023	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**
	(158)	(106)	(236)	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	**66 >**	52	49	57	48 =	46	77 >	56	55	56	50	41	71>	54	57
Rental/Lease	**0.6 <**	**5.7 >**	1.7	**0 <**	**5.2 >**	0	1.5 =	6.3	4.7	0	0	0	1.3 =	8 =	3.4

* Caution: small base

Estimates and Projections: Measuring Tools (including Digital)

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: MEASURING TOOLS (INCLUDING DIGITAL)

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Measuring Tools	%	#	#
Purchase	65.8	81,842	53,852
Rental/lease	0.6	81,842	491

Fishing Tools Purchase and Rental/Lease Behavior

61% of the electrical contracting firms surveyed purchased Fishing tools in 2023. This is a statistically significant increase from two years earlier.

About 1% reported a 2023 rental or lease in this category. This is a statistically unchanged from two years ago.

FISHING TOOLS 2023 TRENDED					
	In 2023		**In 2021**		**In 2019**
	Total		**Total**		**Total**
	(158)		(106)		(236)
Purchase	61%	>	47%	=	46%
Rental/Lease	1.3%	=	0%	<	**2.5%**

Purchase levels: Larger firms and those whose revenue comes from CII projects are more likely than their counterparts to have made a 2023 purchase of Fishing tools.

Rental/lease levels: There are no statistically significant subgroup differences.

FISHING TOOLS 2023 (By Firm Size and Primary Work Type)						
		Number of Employees			**Work Primarily In**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Purchase Level	61	54	<69		53	<67
Rental/Lease	1.3	2.2 =	0		1.6 =	0

* Caution: small base

Trended Results

- Although purchase levels of Fishing tools rose among the total sample compared with two years ago, the apparent changes among firms with 1-9 and 10+ employees or the apparent differences among firms working primarily on residential projects are not statistically significant by themselves. However, purchase levels are significantly higher among firms that work primarily on CII projects compared with two years ago.

- Rental/lease levels of Fishing tools is statistically unchanged among the total sample, by number of employees and by primary source of revenue compared with two years earlier

FISHING TOOLS 2023 Trended															
				Number of Employees						Work Primarily In					
	Total			1-9			10+			Residential			CII		
	2023	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**
	(158)	(106)	(236)	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	**61 >**	47	46	54 =	41	43	69 =	54	52	53	44	38	61>	44	53
Rental/Lease	1.3	0	**< 2.5**	2.2 =	0	1.3	0	0	**< 4.7**	1.6	0	2.4	0	0	**<2.6**

* Caution: small base

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING:
FISHING TOOLS

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying
Fishing Tools	%	#	#
Purchase	60.8	81,842	49,760
Rental/Lease	1.3	81,842	1,064

Pipe Threaders/Benders/Cutters Purchase and Rental/Lease Behavior

41% of the electrical contracting firms surveyed purchased Pipe threaders/benders/cutters in 2023. Purchase levels are statistically unchanged from two years earlier.

3.2 % said that their firm obtained Pipe threaders/benders/cutters through rental/lease, which is also statistically unchanged compared with two years earlier.

PIPE THREADERS/BENDERS/CUTTERS (2023 Trended)											
	In 2023		**In 2021**		**In 2019**		**In 2017**		**In 2015**		**In 2013**
	Total		**Total**		**Total**		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)		(376)		(374)
Purchase	41%	=	36%	=	35%	(>)	**28%**	>	22%	<	**28%**
Rental/Lease	3.2%	=	3.8%	=	5.9%	=	**4.8%**	>	2.3%		--

(> or <) just short of statistical significance

In 2023, larger firms and/or those who work primarily on CII projects are far more likely to *purchase* Pipe threaders/benders/cutters compared with smaller firms and/or those that work primarily on residential projects.

In 2023, there are no statistically significant differences by subgroups in terms of renting/leasing Pipe threaders/benders/cutters.

PIPE THREADERS/BENDERS/CUTTERS (2023 by Subgroups)						
		Number of Employees			**Work Primarily In**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Purchase	41	24	**< 63**		25	**< 53**
Rental/Lease	3.2	4.5=	1.5		3.1	2.6

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

As noted on the preceding page, *purchase* levels are statistically unchanged among the total sample compared with two years earlier. As shown below, this is also the case by number of employees or by primary type of work performed.

Similarly, in the case of rental/lease, there are no statistically significant differences among the total sample compared with two years earlier, nor are there any statistically significant differences by number of employees or by primary type of work performed.

PIPE THREADERS/BENDERS/CUTTERS (2023 by Subgroups Trended)																
	Number of Employees								Work Primarily In…							
	1-9				10+				Residential				CII			
	2023	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**
	(89)	(58)*	(150)	(162)	(68)*	(48)*	(85)	(71)	(64)*	(36)*	(84)	(81)	(76)	(50)*	(116)	(107)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	24	24	**26 >**	16	63 =	50	51	57	25	22 =	14	13	53=	42 =	50	**40**
Rental/Lease	4.5 =	1.7	4	4.1	1.5 =	6.3	9.4	6.4	3.1=	0	2.4	**4.3**	2.6=	4.0	8.6	4.5

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Estimates and Projections: Pipe Threaders/Bender/Cutters

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: PIPE THREADERS, BENDERS, CUTTERS

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Pipe threaders, benders, cutters	%	#	#
Purchase	41.1	81,842	33,637
Rental/Lease	3.2	81,842	2,619

Cable Pullers Purchase and Rental/Lease Behavior

31% of the electrical contracting firms surveyed purchased Cable pullers in 2023, statistically unchanged from the 2021 level of 24%. The percentage of electrical contracting firms renting/leasing, at 7%, is also statistically unchanged compared with two years ago.

CABLE PULLERS (2023)									
	In 2023		In 2021		In 2019		In 2017		In 2015
	Total		Total		Total		Total		Total
	(158)		(106)		(236)		(234)		(376)
Purchase	31%	=	24%	=	25%	=	**19%**	>	10%
Rented/Leased	7%	=	6.6%	=	8.1%	=	**8.2%**	>	2.7%

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

In 2023, larger firms (10+ employees) are more likely to *purchase* Cable pullers compared with smaller firms. However, there is no difference in purchase levels by primary type of work performed.

In 2023, firms working primarily on CII projects are significantly more likely to have *rented/leased* Cable pullers compared with firms working primarily on residential projects but there is no difference by number of employees.

CABLE PULLERS (2023 by Subgroups)						
		Number of Employees			Work Primarily In	
	Total	1-9	10+		Residential	CII
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Purchase	31	14	**< 53**		25=	36
Rented/Leased	7	6.7	7.4		1.6	**< 9**

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

As shown on the previous page, compared to two years ago, there are no statistically significant differences in purchase or rental/lease of Cable pullers among the total sample.

Purchase: As shown below, compared with two years ago, purchase levels of Cable pullers increased among firms with 10+ employees. There is no statistically significant difference among firms with 1-9 employees or by primary type of work performed.

Rental/lease: There are no statistically significant differences in the likelihood to have rented/leased Cable pullers in the previous year, compared with two years earlier.

CABLE PULLERS (2023 Trended)																
	Number of Employees								**Work Primarily In…**							
	1-9				**10+**				**Residential**				**CII**			
	2023	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**
	(89)	(58)*	(150)	(162)	(68)*	(48)*	(85)	(71)	(64)*	(36)*	(84)	(81)	(76)	(50)*	(116)	(107)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	14	19	13	**10**	**53 >**	29	**< 46**	**41**	25 =	14 =	4.8	4.9	36 =	28	38	**29**
Rental/Lease	6.7=	3.4	5.3	4.3	7.4 =	10.4	13	18	1.6 =	0	**< 6**	3.5	9 =	8	10	11

* Caution: small base

Estimates and Projections: Cable Pullers

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: CABLE PULLERS

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Cable pullers	%	#	#
Purchase	31.0	81,842	25,371
Rental/Lease	7.0	81,842	5,729

Construction Site Equipment

Construction Site Equipment is one of the few categories where some equipment is more likely to be obtained through *rental/lease* than through *purchase*. In fact, far more electrical contracting firms continue to obtain Aerial lifts/scaffolding, Digging/HDD/boring equipment, and Cranes and Mobile office space (trailers) through *rental/lease* than through *purchase.*

- Trailers to haul equipment are about equally likely to be obtained through Rental/lease or by purchase.

- In contrast, Personal protective equipment, Temporary power, Job-site safety equipment, Temporary job-site lighting and Portable generators are far more likely to be purchased rather than rented/leased.

  NB: Bolding for emphasis; stat testing doesn't make sense because the sample that rented/leased overlaps with the sample that made purchases.

2023 Rental/Lease to Purchase Comparison		
	Rental/Lease	**Purchase**
	2023	**2023**
	(158)	(158)
	%	**%**
"Any" Purchase/Lease …	58	92
Aerial lifts/scaffolding	**46**	13
Digging/HDD/boring equipment	**33**	12
Cranes	**24**	3
Mobile office space (trailers)	**21**	7
Trailers (to haul equipment/materials)	14	16
Personal protective equipment, including apparel and accessories	1.3	**60**
Temporary power	6	**32**
Job-site safety equipment	8	**40**
Temporary job-site lighting	8	**35**
Portable generators	12	29

Trended Results

- *Rental/lease:* There were no statistically significant changes in lease/rental levels compared with two years earlier for any of the categories shown below. However, between 2015 and 2017, total lease/rental levels jumped dramatically and significantly in total from 37% to 57% and have remained in the higher range

.

- In contrast, *purchase* levels increased compared with two years earlier in the cases of Digging/HDD/boring equipment, Portable generators and Temporary job-site lighting.

    - Hypothesis: could the increase in Temporary job-site lighting *rental/lease* between 2019 and 2021 have paved the way for increased *purchases* in this category between 2021 and 2023?

	Rental/Lease Comparisons Trended							**Purchase Comparison Trended**					
	2023	**2021**	**2019**	**2017**	**2015**	**2013**		**2023**	**2021**	**2019**	**2017**	**2015**	**2013**
	(158)	(106)	(236)	(234)	(376)	(374)		(158)	(106)	(236)	(234)	(376)	(374)
	%	**%**	**%**	**%**	**%**	**%**		**%**	**%**	**%**	**%**	**%**	**%**
"Any" Purchase/Rental/Lease …	58	61	60	**57>**	37	40		92	87	84	81	79	84
Aerial lifts, scaffolding	46	48	45	**46 >**	28	29		13	10	**11 >**	6	**< 10**	**< 16**
Digging/HDD/boring equipment	33	30	34	**28 >**	12	16		**12 >**	5	**9 >**	4	7	9
Cranes*	24	23	**25 >**	**17 >**	6	NA		3	2	3	1	2	NA
Mobile office space (trailers)*	21	20	14	**12 >**	6	NA		7	3	5	3	4	NA
Portable generators*	12	15	13	**11 >**	4	NA		**29 >**	16	19	16	19	NA
Trailers (to haul equipment/materials)*	14	12	9	**8 >**	NA	NA		16	18	17	12	9	NA
Temporary job-site lighting	**8**	**10>**	4.7	4.2	--	--		**35 >**	23	26	23	--	--

* First included in the 2016 Profile Study

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Aerial Lifts/Scaffolding Rental/Lease and Purchase Behavior

In 2023, 46% of firms obtained Aerial lifts/scaffolding through *rental/lease* and 13% through *purchase*.

- Lease/Rental: In 2023, the percentage *renting or leasing* Aerial lifts/scaffolding held steady compared with two years earlier.

- Purchase: In 2023, the percentage making a *purchase* of Aerial lifts/scaffolding also held steady compared with two years earlier.

Aerial Lifts/Scaffolding (2023 Trended)											
	In 2023		**In 2021**		**In 2019**		**In 2017**		**In 2015**		**In 2013**
	Total		**Total**		**Total**		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)		(376)		(374)
Rental/Lease	46%	=	48%	=	45%	=	**46%**	>	28%		29%
Purchase	13%	=	10%	=	**11%**	>	6%	<	**10%**	<	**16%**

Rental/Lease: Larger firms and/or those that work primarily on CII projects are more likely than smaller firms and/or those that work primarily on residential projects to have *rented or leased* Aerial lifts/scaffolding in 2023.

Purchase: Similarly, larger firms and firms that work primarily on CII projects are more likely than smaller firms and/or those that work primarily on residential projects to have made a 2023 *purchase* of Aerial lifts/scaffolding.

AERIAL LIFTS/SCAFFOLDING RENTAL/LEASE and PURCHASE (By Firm Size and Primary Work Type) 2023						
		Number of Employees			**Work Primarily In**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Rental/Lease	46	30	**< 65**		31	**< 54**
Purchase	13	2	**< 25**		1.6	**< 20**

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

Consistent with results among the total sample showing no changes in rental/lease or purchase levels:

- Rental/Lease: Compared with two years earlier, there is no statistically significant change by number of employees or primary type of work performed.

- Purchase: Nor has there been a statistically significant change in the purchase of Aerial lifts/scaffolding compared to two years ago by either number of employees or by primary type of work performed.

AERIAL LIFTS AND SCAFFOLDING (2023 Trended)																
	Number of Employees								**Work Primarily In…**							
	1-9				**10+**				**Residential**				**CII**			
	2023	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**
	(89)	(58)*	(150)	(162)	(68)*	(48)*	(85)	(71)	(64)*	(36)*	(84)	(81)	(76)	(50)*	(116)	(107)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	**%**
Rental/Lease	30	29 =	37	38	65 =	71 =	59	64	31	31	26	28	54 =	60	62	55
Purchase	**2 =**	**7**	**6 >**	1.2	25 =	15	20	18	1.6 =	2.8	**7.1 >**	1.1	20 =	16	13	11

* Caution: small base

Estimates and Projections: Aerial Lifts/Scaffolding

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS RENTING/LEASING AND PURCHASING AERIAL LIFTS/SCAFFOLDING

	Percent of Respondent Firms Renting or Buying	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Renting or Buying
Aerial lifts/scaffolding	%	#	#
Rental/Lease	45.6	81,842	**37,320**
Purchase	12.7	81,842	**10,394**

Digging/HDD/Boring Equipment Rental/Lease and Purchase Behavior

In 2023, 33% of the electrical contracting firms surveyed obtained Digging/HDD/boring equipment through *rental/lease* and 12% through *purchase*.

- Compared with two years earlier, while rental/lease levels are statistically unchanged, purchase levels more than doubled, resulting in a statistically significant increase compared with two years earlier.

DIGGING/HDD/BORING EQUIPMENT (2023 Trended)											
	In 2023		**In 2021**		**In 2019**		**In 2017**		**In 2015**		**In 2013**
	Total		**Total**		**Total**		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)		(376)		(374)
Rental/Lease	33%	=	30%	=	34%	=	**28%**	>	12%	=	16%
Purchase	**12%**	>	4.7%	=	**8.5%**	>	4.2%	=	7%	=	9%

Rental/Lease: Larger firms and/or firms working primarily on CII projects are more likely than smaller firms and/or firms working primarily on residential projects to rent/lease Digging/HDD/boring equipment.

Purchase: There are no subgroup differences by number of employees or by primary type of work performed in the likelihood of purchasing Digging/HDD/boring equipment.

DIGGING/HDD/BORING EQUIPMENT RENTAL/LEASE and PURCHASE (2023 by Subgroups)						
		Number of Employees			**Work Primarily In…**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	**%**	**%**		**%**	**%**
Rental/Lease	33	19	< **50**		22	< **42**
Purchase	12	9 =	16		13 =	9

* Caution: small base

Bolded **numbers denote significant differences at the 90% level of confidence in the direction of the arrow.**

Trended Results

- As noted earlier, there are no differences compared to two years earlier among the total sample on *rental/lease*
  - Consistent with that finding among the total sample, r*ental/lease* of Digging/HDD/boring equipment is statistically unchanged compared with two years earlier among firms with 1-9 employees and among firms with 10+ employees. Nor are there any differences by primary type of work performed shown below.
  - *Purchase* of Digging/HDD/boring equipment posted a statistical increase among the total sample and rose among firms with 10+ employees compared with two years earlier. Purchase of digging/HDD/Boring equipment also posted a significant increase among firms working primarily on residential projects but is unchanged among firms working primarily on CII projects. This finding is somewhat surprising because generally larger firms and those working primarily on CII projects follow a similar trajectory.

DIGGING/HDD/BORING EQUIPMENT (2023 By Subgroups Trended)																
	Number of Employees								**Work Primarily In...**							
	1-9				**10+**				**Residential**				**CII**			
	2023	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**
	(89)	(58)*	(150)	(162)	(68)*	(48)*	(85)	(71)	(64)*	(36)*	(84)	(81)	(76)	(50)*	(116)	(107)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Rental/Lease	19	**14** <	**31** =	**25**	50	50 =	41	**36**	22	22	24	**23**	42	38	**46** >	**31**
Purchase	9 =	3.4	3.3	2.6	**16>**	6 <	**18** >	8	13>	3	2.4	1.4	9	8	10 =	6

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Estimates and Projections: Digging/HDD/Boring Equipment

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS RENTING/LEASING AND PURCHASING DIGGING/HDD/BORING EQUIPMENT

	Percent of Respondent Firms Renting or Buying	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Renting or Buying
DIGGING/HDD/BORING EQUIPMENT	%	#	#
Rental/Lease	32.9	81,842	**26,926**
Purchase	12.0	81,842	**9,821**

Cranes Rental/Lease and Purchase Behavior

24% of electrical contractors obtained Cranes in 2023 through *rental/lease* and 2.5% through *purchase*.

- The percentage of electrical contractors who obtain Cranes through *rental/lease* is statistically unchanged compared with two years earlier.
- Similarly, the percentage making a *purchase* of Cranes is also statistically unchanged compared with 2021.

CRANES (2023 Trended)							
	In 2023		**In 2021**		**In 2019**		**In 2017**
	Total		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)
Rental/Lease	24%	=	23%	=	**25%**	>	17%
Purchase	2.5%	=	1.9%	=	2.5%	=	1.2%

In 2023, Cranes are far more likely to be *rented/leased* by larger firms and/or firms working primarily on CII projects than by smaller firms and/or firms working primarily on residential projects.

Similarly, in terms of purchase, in 2023 Cranes are also more likely to be purchased by larger firms and/or firms working primarily on CII projects than by smaller firms and/or firms working primarily on residential projects.

CRANES (2023 by Subgroups)						
		Number of Employees			**Work Primarily In…**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	**%**	**%**		**%**	**%**
Rental/Lease	24	10	**< 41**		13	**< 29**
Purchase	3	**0**	**< 6**		0	**< 4**

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

- As noted on the previous page, there are no differences compared to two years earlier among the total sample on *rental/lease* or *purchase* levels of Cranes…

    - In 2023, *rental/lease* of Cranes is also statistically unchanged by number of employees and by firms working primarily on CII projects compared with two years earlier. However, Cranes posted a statistically significant increase among firms working primarily on residential projects compared with two years earlier.

    - In 2023, *purchase* of Cranes is also statistically unchanged by number of employees and by firms working primarily on a residential basis compared with two years earlier. However, purchase of Cranes posted a small, but statistically significant increase among firms working primarily on CII projects compared with two years earlier.

CRANES (2023 By Subgroups Trended)

	Number of Employees								Work Primarily In…							
	1-9				10+				Residential				CII			
	2023	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**
	(89)	(58)*	(150)	(162)	(68)*	(48)*	(85)	(71)	(64)*	(36)*	(84)	(81)	(76)	(50)*	(116)	(107)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Rental/Lease	10	7	< **15** >	**6.7**	41	42	44	**42**	**13** >	0	< **10** =	4.9	29 =	36	**36** >	**28**
Purchase	0	1.7	0.7	0.7	6	2.1	5.9	2.6	0	0	0	0	**4** >	**0** <	**4.3**	2.8

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Estimates and Projections: Cranes

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS RENTING/LEASING AND PURCHASING: CRANES

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Renting or Buying
CRANES	%	#	#
Rental/Lease	24.1	81,842	**19,724**
Purchase	2.5	81,842	**2,046**

Office Space (Trailers) Rental/Lease and Purchase Behavior

21% of the electrical contractors surveyed obtained Mobile office space (trailers) in 2023 through *rental/lease* and 7% through *purchase*. The levels of *rental/lease* and *purchase* are each statistically unchanged compared to two years earlier.

MOBILE OFFICE SPACE (2023 Trended)							
	In 2023		**In 2021**		**In 2019**		**In 2017**
	Total		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)
Rental/Lease	21%	=	20%	=	14%	=	12%
Purchase	7.0%	=	2.8%	=	4.7%	=	2.8%

Mobile office space (trailers) is more likely to have been obtained by *rental/lease* in 2023 by larger firms and/or firms working primarily on CII projects than by smaller firms and/or firms working primarily on residential projects.

Similarly, Mobile office space (trailers) is also more likely to have been obtained by *purchase* in 2023 by larger firms compared with smaller firms and/or by firms working primarily on CII projects than by firms working primarily on residential projects.

MOBILE OFFICE SPACE (2023 by Subgroups)						
		Number of Employees			**Work Primarily In**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	**%**	**%**		**%**	**%**
Rental/Lease	21	3.4	**< 44**		6	**< 30**
Purchase	7	0	**< 16**		0	**< 11**

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

Rental/Lease: In 2023, *rental/lease* of Mobile office space (trailers) is statistically unchanged by number of employees and by firms working primarily on CII projects compared with two years earlier. However, Mobile office space (trailers) posted a statistically significant increase among firms working primarily on residential projects compared with two years earlier.

Purchase: There are no statistically significant changes in Mobile office space (trailers) purchase compared with two years earlier by number of employees or among firms working primarily on residential projects. However, purchase of Mobile office space (trailers) posted a significant increase among firms working on CII projects compared with two years earlier.

MOBILE OFFICE SPACE (2023 By Subgroups Trended)												
	Number of Employees						**Work Primarily In…**					
	1-9			**10+**			**Residential**			**CII**		
	2023	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**
	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%
Rental/Lease	3	3	4	44	40	32	**6 >**	0	2.4	30	34 =	22
Purchase	0	0	1.3	16 =	6.3	10.6	0	0	1.2	**11 >**	2	6.0

* Caution: small base

Estimates and Projections: Mobile Office Space (Trailers)

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS RENTING/LEASING AND PURCHASING: MOBILE OFFICE SPACE

	Percent of Respondent Firms Renting or Buying	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Renting or Buying
Mobile office space	%	#	#
Rental/Lease	20.9	81,842	**17,105**
Purchase	7.0	81,842	**5,729**

Portable Generators Purchase and Rental/Lease Behavior

The next two categories—Portable generators and Trailers (to haul equipment/materials)—are different from one another: Portable generators appear to be more likely to be obtained through purchase than through rental/lease while in the case of Trailers, the percentages obtaining this equipment through *purchase* and *rental/lease* are more comparable to each other than is the case with other types of job-site equipment.

29% of the electrical contracting firms surveyed *purchased* Portable generators in 2023. This is a statistically significant difference and is almost double the 2021 purchase level of 16%.

12% obtained Portable generators through *rental/lease;* statistically unchanged compared to two year earlier.

PORTABLE GENERATORS (2023 Trended)							
	In 2023		**In 2021**		**In 2019**		**In 2017**
	Total		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)
Purchase	29%	>	16%	=	19%	=	16%
Rental/Lease	12%	=	15%	=	13%	=	11%

Larger firms and/or firms that work primarily on CII projects are significantly more likely to have purchased Portable generators in 2023 compared with smaller firms and/or firms that work primarily on residential projects.

Similarly, larger firms and/or those that work primarily on CII projects are significantly more likely than smaller firms and/or those that work primarily on residential projects to have made a *rental/lease* in this category.

PORTABLE GENERATORS (2023 by Subgroups)						
		Number of Employees			**Work Primarily In**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Purchase	29	15	**< 47**		15	**< 37**
Rental/Lease	12	5	**< 22**		6	<**16**

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

Purchase: Compared with two years earlier, purchase of Portable generators increased in 2023 among the total sample, among firms with 10+ employees and/or among firms whose revenue comes primarily from CII projects than by smaller firms and/or firms working primarily on residential projects.

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Rental/lease: Compared with two years ago, *rental/lease* of Portable generators is statistically unchanged among the total sample and by company size. However, rental/lease levels posted a statistically significant increase among firms whose revenue comes primarily from residential projects.

PORTABLE GENERATORS (2023 Trended)															
				Number of Employees						Work Primarily In…					
	Total			1-9			10+			Residential			CII		
	2023	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**
	(158)	(106)	(236)	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchase	**29** >	16	19	15 =	7	11	**47** >	27	33	15=	8	6	**37**>	20	28
Rental/Lease	12	15	13	5	2	< **6**	22 =	31	26	6 >	0	< **3.6**	16=	22	21

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Estimates and Projections: Portable Generators

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: PORTABLE GENERATORS

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Portable generators	%	#	#
Purchase	29.1	81,842	**23,816**
Rental/Lease	12.0	81,842	**9,821**

Trailers (To Haul Equipment/Materials) Purchase and Rental Behavior

This is the only category where the level of purchase is more comparable to the level of rental/lease.

16% of electrical contracting firms *purchased* Trailers (to haul equipment/materials) in 2023. This is statistically unchanged from the level observed in 2021.

14% *rented or leased* Trailers (to haul equipment/materials) in 2023, also statistically unchanged compared with 2021 results.

TRAILERS (TO HAUL EQUIPMENT/MATERIALS) (2023 Trended)							
	In 2023		**In 2021**		**In 2019**		**In 2017**
	Total		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)
Purchase	16%	=	18%	=	17%	=	12%
Rental/Lease	14%	=	12%	=	9%	=	8%

Purchase levels are higher among firms with 10+ employees and/or among firms whose primary source of revenue comes from CII projects.

There are no subgroup differences in the *rental/lease* of Trailers (to haul equipment/materials).

TRAILERS (TO HAUL EQUIPMENT/MATERIALS) (2023)						
		Number of Employees			**Work Primarily In**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Purchase	16	1.1	**< 35**		6	**< 25**
Rental/Lease	14	10 =	18		8 =	15

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

Purchase: There are no statistically significant differences among the total sample, by number of employees or by primary type of work in the *purchase* of Trailers (to haul equipment/materials) compared with two years earlier.

Rental/lease: Similarly, there are no statistically significant differences among the total sample, by number of employees or by the primary type of work performed in the *rental/lease* of Trailers (to haul equipment/materials) compared with two years earlier.

TRAILERS (TO HAUL EQUIPMENT/MATERIALS) (2023 Trended – By Subgroup)																
				Number of Employees						**Work Primarily In…**						
	Total			**1-9**			**10+**			**Residential**			**CII**			
	2023	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**
	(158)	(106)	(236)	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchase	16	18	17	**1.1**	7	10	35	31	28	6	14	6	25	24	22
Rental/Lease	14	12	9	10	7	7	18	19	13	8	8	4.8	15	14	11

Estimates and Projections: Trailers (to Haul Equipment/Materials)

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: TRAILERS (TO HAUL EQUIPMENT/MATERIALS)

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Trailers (to haul equipment/materials)	%	#	#
Purchase	15.8	81,842	**12,931**
Rental/Lease	13.9	81,842	**11,376**

Personal Protective Equipment, Including Apparel and Accessories: Purchase and Rental Behavior

In the remaining sections—Personal protective equipment, Job-site safety equipment, and Temporary job-site lighting—purchase plays a much more dominant role than does rental/lease.

60% of electrical contracting firms reported a 2023 *purchase* of Personal protective equipment, including apparel and accessories, which is a statistically significant increase compared with 2021.

Only 1.3% of electrical contracting firms *rented/leased* in this category; this level is statistically unchanged from the levels observed in 2021.

PERSONAL PROTECTIVE EQUIPMENT/APPAREL and ACCESSORIES (2023 Trended)									
	In 2023		**In 2021**		**In 2019**		**In 2017**		**In 2015**
	Total		**Total**		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)		(376)
Purchase	**60%**	>	44%	=	43%	=	**42%**	>	31%
Rental/Lease	1.3%	=	1.9%	=	3.4%	=	2%	=	0.6%

Purchase levels are higher among larger companies and/or firms that work primarily on CII construction rather than for smaller firms and/or those that primarily work on residential construction.

Rental/lease levels are a fraction of the purchase levels and in the case of *rental/lease,* there are no statistically significant differences by either number of employees or by the firm's primary source of revenue.

PERSONAL PROTECTIVE EQUIPMENT/APPAREL and ACCESSORIES (2023)					
		Number of Employees		**Work Primarily In**	
	Total	**1-9**	**10+**	**Residential**	**CII**
	(158)	(89)	(68)*	(64)*	(76)
	%	%	%	%	%
Purchase	60	38	< **87**	44	< **72**
Rental/Lease	1.3	2.2	0	0	1.3

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

Purchase: Compared to two years ago, as shown on the preceding page, purchase levels rose among the total sample and, as shown below, rose among firms with 10+ employees and/or among firms whose primary source of revenue is from CII projects.

Rental/lease: On the other hand, in the case of *rental/lease*, compared to two years ago, there are no statistically significant differences among the total sample, as shown on the previous page or, as shown below, by number of employees or by the primary type of work performed in the *rental/lease* of Personal protective equipment, including apparel and accessories.

PERSONAL PROTECTIVE EQUIPMENT/ APPAREL and ACCESSORIES (2023 Trended)																
	Number of Employees								**Work Primarily In.**							
	1-9				**10+**				**Residential**				**CII**			
	2023	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**
	(89)	(58)*	(150)	(162)	(68)*	(48)*	(85)	(71)	(64)*	(36)*	(84)	(81)	(76)	(50)*	(116)	(107)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchase	38	28	34	31	**87** >	65	59	68	44 =	28	27	27	**72** >	54	53	54
Rental/Lease	2.2	1.7	1.3	0.7	0	2.1	7	5	0	2.8	0	1.4	1.3	2	6	3.4

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Estimates and Projections: Personal Protective Equipment/ Apparel and Accessories

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING:
PERSONAL PROTECTIVE EQUIPMENT/ APPAREL AND ACCESSORIES

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Personal protective equipment, including apparel and accessories	%	#	#
Purchase	59.5	81,842	**48,696**
Rental/Lease	1.3	81,842	**1,064**

Job-Site Safety Equipment Purchase and Rental/Lease Behavior

40% of the electrical contracting firms surveyed reported a 2023 *purchase* of Job-site safety equipment. 8% obtained Job-site safety equipment through *rental/lease*. Both *purchase* levels and levels of *rental/lease* are statistically unchanged compared with two years earlier.

JOB-SITE SAFETY EQUIPMENT (2023 Trended)											
	In 2023		**In 2021**		**In 2019**		**In 2017**		**In 2015**		**In 2013**
	Total		**Total**		**Total**		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)		(376)		(374)
Purchase	40%	=	35%	=	34%	=	28%	=	26%	<	**32%**
Rental/Lease	8%	=	4%	=	7%	**=**	**6%**	>	1.4		--

In 2023, *purchase* levels of Job-site safety equipment were higher among larger companies and/or companies that work primarily on CII projects compared with companies that have 1-9 employees and/or that work primarily on residential projects.

In 2023, larger companies were more likely than smaller companies to have *rented or leased* Job-site safety equipment. However, there was no difference in the 2023 *rental/lease* of Job-site safety equipment by the firm's primary source of revenue.

JOB-SITE SAFETY EQUIPMENT (2023 by Subgroups)						
		Number of Employees			**Work Primarily In…**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	**%**	**%**		**%**	**%**
Purchase	40	19	< **66**		22	< **55**
Rental/Lease	8	3.4	< **15**		5 =	9

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

Trended Results

As shown on the preceding page, *purchase* levels are statistically unchanged among the total sample. Consistent with that finding, purchase levels are also unchanged, as shown below, by number of employees and by the firm's primary source of revenue compared with two years earlier.

As shown on the preceding page, there was no statistically significant change in *rental/lease* behavior among the total sample. Consistent with that finding, as shown below, nor are there changes in rental/lease by number of employees compared with two years earlier. However, rental/lease of Job-site safety equipment increased compared to two years earlier among firms working primarily on residential projects, while there was no change among firms working primarily on CII projects.

JOB-SITE SAFETY EQUIPMENT (2023 Trended by Subgroup)																
	Number of Employees								Work Primarily In							
	1-9				10+				Residential				CII			
	2023	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**	**2023**	**2021**	**2019**	**2017**
	(89)	(58)*	(150)	(162)	(68)*	(48)*	(85)	(71)	(64)*	(36)*	(84)	(81)	(76)	(50)*	(116)	(107)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchase	**19 =**	12 <	**23 >**	14	66	63	53	**60**	22=	11	17	9	55 =	48	44	**45**
Rental/Lease	3.4	1.7	4.7	3	15 =	6	12	**14**	**5 >**	0	**< 6**	**4.6**	9	6	9	**7.3**

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

Estimates and Projections: Job-site Safety Equipment

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: JOB-SITE SAFETY EQUIPMENT

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Job-site safety equipment	%	#	#
Purchase	39.9	81,842	**32,655**
Rental/Lease	8.2	81,842	**6.711**

Temporary Job-site Lighting Purchase and Rental/Lease Behavior

35% of electrical contracting firms *purchased* Temporary job-site lighting in 2023, a statistically significant increase from the 23% measured two years earlier. 8% re*nted or leased* in this category in 2023, which is statistically unchanged compared with two years earlier.

TEMPORARY JOB-SITE LIGHTING (2023 Trended)							
	In 2023		**In 2021**		**In 2019**		**In 2017**
	Total		**Total**		**Total**		**Total**
	(158)		(106)		(236)		(234)
Purchase	**35%**	>	23%	=	26%	=	23%
Rental/Lease	**8.2%**	=	**10%**	>	4.7%	=	4.2%

Purchase levels are significantly higher among larger electrical contracting firms and/or among those that work primarily on CII projects compared with smaller firms and/or those that work primarily on residential projects. In contrast, there are no subgroup differences in the rental/lease of Temporary job-site lighting.

TEMPORARY JOB-SITE LIGHTING (2023)						
		Number of Employees			**Work Primarily In**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	**%**	**%**		**%**	**%**
Purchase	35	12	**< 65**		17	**< 46**
Rental/Lease	8.2	7	9		9	4

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

Trended Results

Compared with two years earlier, *purchase* levels posted a statistical increase among the total sample and as shown below, among firms with 10+ employees.

Although *rental/leasing* of Temporary job site lighting is statistically unchanged among the total sample compared with two years earlier, it posted a statistically significant decline among firms with 10+ employees and a statistically significant increase among firms whose revenue comes primarily from residential projects.

TEMPORARY JOB-SITE LIGHTING (2023 Trended – By Subgroup)

				Number of Employees						Work Primarily In…					
	Total			1-9			10+			Residential			CII		
	2023	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**	**2023**	**2021**	**2019**
	(158)	(106)	(236)	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchase	**35** >	23 =	26	12	10 =	14	**65** >	38 =	47	17	8 =	12	46	34 =	38
Rental/Lease	8	**10** >	5	7 =	1.7 =	1.3	**9** <	21 =	11	**9** >	0 =	0	4 =	12 =	7

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: TEMPORARY JOB-SITE LIGHTING

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Temporary job-site lighting	%	#	#
Purchase	34.8	81,842	28,481
Rental/Lease	8.2	81,842	6,711

Temporary Power Purchase and Rental/Lease Behavior

In 2023, 32% of electrical contractors purchased Temporary power and 6% rented or leased in this category. Both levels are statisically unchanged compared with two years earlier

TEMPORARY POWER (2023 Trended)		
	Total	
	2023	**2021**
	(158)	(106)
	%	%
Purchase Level	32	26
Rental/Lease	6	8

Purchase levels of Temporary power are significantly higher among firms with 10+ employees and/or among firms that work primarily on CII projects compared with smaller firms and/or those that work primarily on residential projects.

Rental/lease: There is no statistically significant difference in rental/lease of Temporay power either by number of employees or by primary type of work performed.

TEMPORARY POWER 2023 (By Firm Size and Primary Work Type)						
		Number of Employees			Work Primarily In	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Purchase Level	32	17	**< 50**		14	**< 43**
Rental/Lease	6	5	9		5	5

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

Trended Results

Compared with two years earlier, *purchase* levels are statistically unchanged among the total sample and by the subgroups shown below.

Similarly, compared with two years earlier, *rental/lease* levels are statistically unchanged among the total sample and by the subgroups shown below.

Temporary Power (2023) -- Trended By Subgroup										
			Number of Employees				**Work Primarily In…**			
	Total		**1-9**		**10+**		**Residential**		**CII**	
	2023	**2021**	**2023**	**2021**	**2023**	**2021**	**2023**	**2021**	**2023**	**2021**
	(158)	(106)	(89)	(58)*	(68)*	(48)*	(64)*	(36)*	(76)	(50)*
	%	%	%	%	%	%	%	%	%	%
Purchase Level	32=	26	17	9	50	48	14	11	43	38
Rental/Lease	6	8	5	5	9	10	5	6	5	6

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: TEMPORARY POWER

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Temporary Power	%	#	#
Purchase	31.6	81,842	25,862
Rental/Lease	6.3	81,842	5,156

Surveying Tools and Equipment Purchase and Rental/Lease Behavior

In 2023, 10% of electrical contracting firms obtained Surveying tools and equipment by purchase and 4% by rental/lease. Both levels are statisically unchanged from two years earlier.

SURVEYING TOOLS (2023 Trended)		
	Total	
	2023	2021
	(158)	(106)
	%	%
Purchase Level	10 =	14
Rental/Lease	4.4 =	6.6

Purchase levels of Surveying tools are significantly higher among firms with 10+ employees and/or among firms that work primarily on CII projects compared with smaller firms and/or those that work primarily on residential projects.

Rental/lease: There is no statitically significant difference in rental/lease of Surveyig tools either by number of employees or by primary type of work performed.

SURVEYING TOOLS AND EQUIPMENT 2023 (By Firm Size and Primary Work Type)						
		Number of Employees			Work Primarily In	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	**%**	**%**		**%**	**%**
Purchase Level	10	2	**< 21**		3	**< 16**
Rental/Lease	4.4	3.4	5.9		3.1	3.9

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

Trended Results

Compared with two years earlier, *purchase* levels are statistically unchanged among the total sample and by the subgroups shown below.

Similarly, compared with two years earlier, *rental/lease* levels are statistically unchanged among the total sample and by the subgroups shown below.

Surveying Tools (2023) -- Trended By Subgroup										
			Number of Employees				**Work Primarily In…**			
	Total		**1-9**		**10+**		**Residential**		**CII**	
	2023	**2021**	**2023**	**2021**	**2023**	**2021**	**2023**	**2021**	**2023**	**2021**
	(158)	(106)	(89)	(58)*	(68)*	(48)*	(64)*	(36)*	(76)	(50)*
	%	%	%	%	%	%	%	%	%	%
Purchase Level	10 =	14	2.2 =	3.4	21 =	27	3.1 =	2.8	16 =	20
Rental/Lease	4.4 =	6.6	3.4 =	1.7	5.9 =	12.5	3.1=	0	3.9 =	8

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: SURVEYING TOOLS AND EQUIPMENT

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Surveying Tools and Equipment	%	#	#
Purchase	10.1	81,842	**8,266**
Rental/Lease	4.4	81,842	**3,601**

Wearable Technology Purchase and Rental/Lease Behavior

In 2023, 18% of the electrical contractors surveyed made a *purchase* of wearable technology (defined in the survey as smart watches or heated outerwear) and 1.3% *rented/leased* in this category. Both levels are statisically unchanged from two years earlier.

WEARABLE TECHNOLOGY (2023 Trended)		
	Total	
	2023	**2021**
	(158)	(106)
	%	%
Purchase Level	18 =	14
Rental/Lease	1.3 =	1.9

There is no statistically significant difference in *purchase* or in *rental/lease* levels by number of employees or by the primary type of work performed.

WEARABLE TECHNOLOGY (2023)					
		Number of Employees		**Work Primarily In**	
	Total	**1-9**	**10+**	**Residential**	**CII**
	(158)	(89)	(68)*	(64)*	(76)
	%	**%**	**%**	**%**	**%**
Purchase	18	15	24	16	18
Rental/Lease	1.3	2.2	0	1.6	0

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

Trended Results

With one exception—purchase of Wearable technology rose among firms working primarily on residential projects—there are no statistically significant changes in purchase or rental lease among the total sample or by the subgroups shown below compared with two years earlier.

Wearable Technology (2023) -- Trended By Subgroup										
			Number of Employees				Work Primarily In…			
	Total		1-9		10+		Residential		CII	
	2023	**2021**	**2023**	**2021**	**2023**	**2021**	**2023**	**2021**	**2023**	**2021**
	(158)	(106)	(89)	(58)*	(68)*	(48)*	(64)*	(36)*	(76)	(50)*
	%	%	%	%	%	%	%	%	%	%
Purchase Level	18 =	14	15 =	12	24 =	17	**16 >**	5.6	18 =	16
Rental/Lease	1.3 =	1.9	2.2 =	0	0 =	4.2	1.6 =	0	0 =	2.0

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: WEARABLE TECHNOLOGY

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Wearable Technology	%	#	#
Purchase	18.4	81,842	**15,059**
Rental/Lease	1.3	81,842	**1,064**

Robots Purchase and Rental/Lease Behavior (This section also appears in the 2nd volume of this report)

Both 2023 *purchase* and *rental/lease* remain low in this category:

- 1.3% reported purchasing a Robot in 2023.
- 1.9% reported rental/lease of a Robot in 2023.

ROBOTS (2023 Trended)		
	Total	
	2023	**2021**
	(158)	(106)
	%	%
Purchase Level	1.3 =	2.8
Rental/Lease	1.9 =	1.9

There are no statistically significant differences by the subgroups shown below in terms of purchase or rental/lease.

ROBOTS (2023)						
		Number of Employees			**Work Primarily In**	
	Total	**1-9**	**10+**		**Residential**	**CII**
	(158)	(89)	(68)*		(64)*	(76)
	%	**%**	**%**		**%**	**%**
Purchase	1.3	0	2.9		0	2.6
Rental/Lease	1.9	2.2	1.5		1.6	2.6

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

Trended Results

There are no statistically significant differences by the subgroups shown below in terms of purchase or rental/lease compared with two years earlier.

Robots (2023) -- Trended By Subgroup										
			Number of Employees				**Work Primarily In…**			
	Total		**1-9**		**10+**		**Residential**		**CII**	
	2023	**2021**	**2023**	**2021**	**2023**	**2021**	**2023**	**2021**	**2023**	**2021**
	(158)	(106)	(89)	(58)*	(68)*	(48)*	(64)*	(36)*	(76)	(50)*
	%	%	%	%	%	%	%	%	%	%
Purchase Level	1.3 =	2.8	0 =	0	2.9 =	6.3	0 =	0	2.6 =	6.0
Rental/Lease	1.9 =	1.9	2.2 =	1.7	1.5 =	2.1	1.6 =	0	2.6 =	0

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: ROBOTS

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Robots	%	#	#
Purchase	1.3	81,842	**1,064**
Rental/Lease	1.9	81,842	**1,555**