# ELECTRICAL CONTRACTOR

POWER & INTEGRATED BUILDING SYSTEMS

## 2020 PROFILE OF THE ELECTRICAL CONTRACTOR


## SPECIAL REPORT ON TOOLS AND EQUIPMENT PURCHASE AND LEASING

2020 "ELECTRICAL CONTRACTOR MAGAZINE PROFILE"
DATABASE REPORT

# ELECTRICAL CONTRACTORS:

## THEIR USE, PURCHASE AND 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

INCLUDING ESTIMATES BASED ON THE 2018 COUNTY BUSINESS PATTERNS

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

FOR:

WASHINGTON, DC 20004

NOVEMBER 2020

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## KEY FINDINGS

This report is volume one of a two-volume report covering different types of tools and equipment as well as use of electronic devices and software. Pages 1 and 2, as well as pages 9 – 24 are common to both reports.

**USE, PURCHASE AND RENTAL/LEASE BEHAVIOR OVERVIEW**:

### Tools and Equipment **Used** in 2019

In 2020, the following 3 tool types were added to the list asked in 2018: Measuring tools (including digital), Fishing tools and 3D printers.

Not surprisingly, as was the case two years ago, many of the top categories mentioned were those that received high levels of purchase and/or rental/lease in previous Profile studies, with about 8 in 10 mentioning: Hand tools, Power tools, Electrical testers, multimeters, Measuring tools and Fishing tools. About 7 in 10 mentioned Phones (including Smartphones, Mobile, Cell, Two-way radios and Push-to-talk phones), Pipe threaders, benders, cutters, Labeling/identification and/or Personal protective equipment (PPE), including apparel and accessories.

Between about 50% and 60% of the firms surveyed said that they or their firm used the following in 2019: Job-site safety equipment, Cable pullers, Portable generators, Tablets or portable reading devices, Software, Aerial lifts/scaffolding, Temporary job-site lighting and/or Trailers (to haul equipment). However, we think that the Software numbers are too low for several reasons:

- The list of software types included only 6 types of software rather than a more expanded list.
- Based on a different series of questions (asked in a Version 8 of the survey), we believe that software usage by electrical contractors is actually closer to 90%. In that question instead of asking the participants about their use of "software", we asked if the respondents handled each of the 13 tasks "…internally, using a computer". This was done because we had concerns that the word "software" may be ambiguous to survey participants, for example, if it comes pre-loaded is it viewed as "software"?

Usage of four types of tools and equipment rose significantly compared to 2017: Labeling/identification, Job-site safety equipment, Tablets or portable reading devices, Trailers (to haul equipment/materials). Usage did not decline for any of the types of tools and equipment studied.

In 2019, 90% of electrical contractors say that they made use of multiple types of tools and equipment, statistically unchanged from two years earlier.

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Note: In the cases of Digging/HDD/Boring Equipment, Aerial lifts/scaffolding, Cranes and Mobile office space, a somewhat higher percentage of firms said that they had *purchased* and/or *rented/leased* these types of equipment than had reported *using* them. This could be an error in reporting on the part of participants or it could be that these items were acquired in anticipation of their later use, or some combination of the two. Note that we also observed this type of discrepancy two years ago.

## Tools and Equipment **Purchased** in 2019

Eight in ten electrical contractors (84%) reported purchasing Tools and Equipment in 2019, statistically unchanged from two years earlier.

Hand tools and Power tools continue to top the list.

- In 2019, purchase of 5 these types of tools and equipment rose from their 2017 levels: Electrical tester, multimeters, etc., LAN, datacom, other low-voltage testing equipment, Aerial lifts/scaffolding, Digging/HDD boring equipment and Drones.
    - In contrast, none of the purchase levels declined compared with two years earlier. All of the remaining types of tools and equipment were statistically unchanged or could not be trended because they were just added in the most recent study.

As was the case in previous Profile studies, in 2019, the bulk of electrical contractors made purchases in *multiple* categories (79% in 2019), statistically unchanged compared with two years earlier.

- However, significantly more companies report making a 2019 purchase in 4 or more and 6 or more categories while significantly fewer report making a purchase in 2-3 categories.
    - This is in contrast to two years earlier when there were no statistically significant differences between 2017 and 2015.

## Tools and Equipment **Rented/Leased** in 2019

In 2019, as was the case in 2017, six in ten electrical contractors (60%) *rented/leased* equipment. Note that in 2015 and 2013, 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 (60%) than through outright purchase (84%).

As was also the case two 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.

Of these four categories, only Cranes posted an increase among the total sample in rental/lease. The other three categories were unchanged compared with two years earlier. None of the types of tools and equipment studied posted a decline in rental/lease compared with two years earlier.

- In addition, rental/lease of Power tools has also increased compared to two years earlier.
- Among the total sample, almost one half (46%) of electrical contractors rented or leased in multiple categories. This is statistically unchanged from two years earlier. Not surprisingly, rental/lease “Any”, and in multiple categories is higher among larger firms and/or among firms that work primarily on CII rather than residential projects.

## KEY FINDINGS: TOOLS

### Hand Tools

74% of respondent firms made a purchase in the Hand tools category in 2019, statistically unchanged compared with 2017. 6% said that their firm obtained Hand tools through rental/lease, also statistically unchanged compared with two years earlier.

In 2019, there were no subgroup differences by number of employees in terms of purchase or rental/lease. Firms that work primarily on CII projects are significantly more likely to report hand tool purchases, compared with firms that work primarily on residential projects. However, there is no difference by primary type of construction activity on the rental/lease of hand tools.

### Power Tools

68% of electrical contracting firms reported making a 2019 purchase of Power tools. This purchase level is statistically unchanged from the 2017 purchase level of 66%. 12% of electrical contractors reported renting or leasing Power tools in 2019. This is a statistically significant increase versus two years earlier and is significantly higher than any level since 2013.

- Purchase: In 2019, larger firms (10+ employees) and firms that work primarily on CII projects were significantly more likely to report making a 2019 Power tools purchase compared with firms with 1-9 employees and/or firms who work primarily on residential projects.

- Rental/Lease: In 2019, firms that work primarily on CII are also more likely than firms that work primarily on residential construction to obtain Power tools through rental or lease. However, there was no difference in rental or lease of Power tools by number of employees.

### Measuring Tools (Including Digital)

49% of electrical contracting firms purchased Measuring tools (including digital) in 2019; 1.75% rented or leased in this category in 2019.

- Purchase levels are significantly higher among firms that work primarily on CII projects. However, there is no difference by number of employees.

- Rental/lease levels: Although at low levels, rental/lease levels are higher among firms with 10+ employees and/or those that work primarily on CII projects.

**Fishing Tools**

46% of electrical contracting firms purchased Fishing tools in 2019; 2.5% rented or leased in this category in 2019.

- Purchase levels are significantly higher among firms that work primarily on CII projects. However, there is no difference by number of employees.

- Rental/lease levels: There are no statistically significant differences by number of employees or by primary type of construction.

**Pipe Threaders, Benders and Cutters**

35% of electrical contracting firms purchased Pipe threaders/benders/cutters in 2019. The percentage difference compared with two years earlier, when it was 28%, is just short of statistical significance.

5.9% said that their firm obtained Pipe threaders/benders/cutters through rental/lease, which is statistically unchanged compared with two years earlier.

- In 2019, 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 2019, firms that work primarily on CII projects are also more likely than firms that work primarily on residential projects to have obtained Pipe threaders/benders/cutters through *rental/lease*. However, there is no difference by number of employees in terms of 2019 rental/lease likelihood.

**Cable Pullers**

25% of electrical contracting firms purchased Cable pullers in 2019, which is statistically unchanged vs. the 2017 level of 19%. The percentage of electrical contracting firms renting/leasing, at 8%, is also statistically unchanged compared with two years ago.

- Larger firms and/or those that work primarily on CII projects are significantly more likely to have obtained Cable pullers in the previous year by *purchase* compared with smaller firms and/or those that work primarily on residential projects.

- Larger firms are also more likely than smaller firms to have obtained Cable pullers through rental/lease compared with smaller firms. However, in 2019, there was no difference in the likelihood to rental or lease Cable pullers by the primary type of work performed.

**KEY FINDINGS: CONSTRUCTION SITE EQUIPMENT**

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

- In contrast, however, Personal protective equipment, Job-site safety equipment and Temporary jobsite lighting are far more likely to be purchased rather than rented/leased.
- In all other cases – Mobile office space (trailers), Trailers to haul equipment/materials and Portable generators – the difference between renting/lease and purchase is less than 10 percentage points

**Aerial Lifts/Scaffolding Rental/Lease and Purchase Behavior**

In 2019, 45% of firms obtained Aerial lifts/scaffolding through *rental/lease* and 11% through *purchase*.

- <u>Lease/Rental</u>: The percentage *renting or leasing* Aerial lifts/scaffolding held steady compared with two years earlier.
- <u>Purchase</u>: In contrast to the rental/lease results, the percentage making a *purchase* in 2019 increased significantly from 2017, returning to its 2015 level. This is the first time that purchase levels rose since 2013.
    - Not surprisingly, larger firms are far more likely than their smaller counterparts to have acquired Aerial Lifts/scaffolding through either rental/lease <u>or</u> through purchase. In addition, firms working primarily on CII projects are more likely to have rented/leased Aerial lifts/scaffolding compared with firms that work primarily on residential projects.

**Digging/HDD/Boring Equipment**

In 2019, 34% of electrical contracting firms obtained Digging/HDD/boring equipment through *rental/lease* and 8.5% through *purchase*.

- Compared with two years earlier, rental/lease levels are statistically unchanged while the percentage that purchased Digging/HDD/boring equipment doubled to 8.5% from 4.2%, a statistically significant increase.
    - o <u>Rental/Lease</u>: Firms that work primarily on CII projects are more likely than those that work primarily on residential projects to rent/lease Digging/HDD/boring equipment. However, there is no difference by firm size.
    - o <u>Purchase</u>: Larger electrical contracting firms and/or those that work primarily on CII projects are more likely than smaller electrical contracting firms and/or those that work primarily on residential projects to purchase Digging/HDD/boring equipment.

**Cranes Rental/Lease and Purchase Behavior**

25% of electrical contractors obtained Cranes in 2019 through *rental/lease* and 2.5% through *purchase*.

- The percentage of electrical contractors who obtain Cranes through *rental/lease* rose significantly from 17% in 2017, which itself represents a dramatic and significant rise from the 2015 level of 6.5%.
- However, the percentage making a *purchase*, at 2.5 % is statistically unchanged compared with two years and four years earlier.

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.

The same holds true for purchase. Cranes are far more likely to be purchased by larger firms and/or firms working primarily on CII projects than by smaller firms and/or those working primarily on residential projects.

**Mobile Office Space**

14% of electrical contractors obtained Mobile office space (trailers) in 2019 through *rental/lease* and 4.7% through *purchase*. The levels of rental/lease and purchase are each statistically unchanged compared to two years earlier. .

Mobile office space (trailers) is more likely to have been obtained in 2019 by larger firms and/or firms working primarily on CII projects than by smaller firms and/or firms working primarily on residential projects. This is the case for both rental/lease and purchase.

*Continues on the next page…*

**In the next two sections -- Portable generators and Trailers (to haul equipment/materials) – the percentages obtaining through *purchase* and *rental/lease* are more comparable to each other than is the case with other types of job site equipment.**

**Portable Generators**

19% of electrical contracting firms *purchased* Portable generators in 2019, statistically unchanged from the 2017 results. 13% obtained Portable generators through *rental/lease*, also statistically unchanged compared to two year earlier.

Of the categories where rental/lease plays at least a non-negligible role, this is the first job site category in this report where the level of purchase appears to be comparable to the level of rental/lease.

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 purchase or rental/lease in this category.

**Trailers (to Haul Equipment)**

This is the second of the two categories where rental/lease plays at least a non-negligible role, and where the level of purchase is actually higher than the level of rental/lease.

17% of electrical contracting firms *purchased* Trailers (to haul equipment/materials) in 2019. This is statistically unchanged from the level observed in 2017.

9% *rented or leased* Trailers (to haul equipment/materials) in 2019, also statistically unchanged compared with 2017 results.

*Purchase* levels are higher among firms with 10+ employees and/or among firms working primarily on CII projects.

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

**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.**

**Personal Protective Equipment/Apparel**

43% of electrical contracting firms reported a 2019 *purchase* of Personal protective equipment, including apparel and accessories, statistically unchanged compared with 2017.

Only 3.4% of electrical contracting firms *rented/leased* in this category; also statistically unchanged from the levels observed in 2017.

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, although at a low level among the total sample, is nevertheless significantly higher among firms with 10+ employees and/or those that work primarily on CII projects.

**Job-site Safety Equipment**

34% of electrical contracting firms reported a 2019 purchase of Job-site safety equipment. 7% obtained Job-site safety equipment through rental/lease. Both purchase levels and levels of rental/lease are statistically unchanged compared with two years earlier.

In 2019, *purchase* levels 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 for Job-site safety equipment.

In 2019, larger companies were more likely to *rent/lease* Job-site safety equipment, however there were no differences by primary type of work.

**Temporary Job-site Lighting Purchase and Rental/Lease Behavior**

26% of electrical contracting firms purchased Temporary job-site lighting in 2019, which is statistically unchanged from the 23% which was measured two years earlier. 4.7% rented or leased in this category in 2019, which is also statistically unchanged from two years earlier.

Both *Purchase* levels and *rental/lease* levels are significantly higher among larger electrical contracting firms and/or among those that work primarily on CII projects.

## METHODOLOGY

This report focuses on electrical contractors' use, purchase, rental/lease for hand tools and power tools and construction site equipment. In 2020, three new categories were included. They are: Measuring tools (including digital), Fishing tools and 3D printers. Please note that the Profile study is conducted in even years (2018 or 2016) and asks about the previous year (2019 or 2017).

The survey was conducted by internet and postal mail among a random sample of ELECTRICAL CONTRACTOR subscribers. In addition, in 2020 as in 2018, about 100 members of the ELECTRICAL CONTRACTOR Subscriber Research Panel also participated in the survey. The field period for the survey began on February 21, 2020 and ran through April 13, 2020, which was the deadline for the July 2020 article. A total of 1635 completed the survey during that time period.

In 2020, we offered those in the mail sample a choice of either participating in the survey online, though a link, or to continue to receive a paper survey by postal mail. A total of 144 completed the survey by mail and another 53 completed the survey online.

The data were not weighted for two reasons – since the proportion of the total attributable to the print list was so low, weighting would distort the total statistics. The other reason was that comparing the unweighted 2020 results with the 2018 weighted results showed very little difference among the total sample.

Each respondent who received the survey through the internet was sent up to four follow-up emails. However, follow-up mailings were not made to nonresponders in the postal mail sample. 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, as was the case in 2018, the magazine also offered a sweepstakes drawing 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 3 pages were common to all versions while the differences among the versions occurred on the last page. The major difference was that in the Internet portion respondents were *required* in almost all cases to have percentage questions add to 100%.

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 236 and Version 8 has a base size of 232.

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 Use, Purchase and Rental/Lease Overview

### Tools and Equipment Used in 2019

In the 2020 Profile study, electrical contractors were asked to indicate which of 30 types of tools and equipment they or their firm **used** in the *previous* year.

In 2020, the following three tool types were added to the list asked in the 2018 Profile study: Measuring tools (including digital), Fishing tools and 3D printers.

Not surprisingly, as was the case two years ago, many of the top categories mentioned were those that received high levels of purchase and/or rental/lease in previous Profile Studies, with about 8 in 10 mentioning: Hand tools, Power tools, Electrical testers, multimeters, Measuring tools and/or Fishing tools. About 7 in 10 mentioned Phones (including Smartphones, Mobile, Cell, Two-way radios and Push-to-talk phones), Pipe threaders, benders, cutters, Labeling/identification and/or Personal protective equipment (PPE), including apparel and accessories.

Between about 50% and 60% of the firms surveyed said that they or their firm used the following in 2019: Job-site safety equipment, Cable pullers, Portable generators, Tablets or portable reading devices, Software*, Aerial lifts/scaffolding, Temporary job-site lighting, and/or Trailers (to haul equipment).

About one-third mentioned LAN, teledata, low voltage meters, Digging/HDD/boring equipment** and/or Thermal imaging.

15 percent or fewer mentioned: Thermal imaging, Mobile office space (trailers), Cranes, 3D scanner, Drones, and/or 3D printers.

The table follows on the next page.

Usage of four types of tools and equipment rose significantly compared to 2017: Labeling/identification, Job-site safety equipment, Tablets or portable reading devices, and/or Trailers (to haul equipment/materials). Usage did not decline for any of the types of tools and equipment studied.

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*Based on a different series of questions (asked in a Version 8 of the survey), we believe that software usage by electrical contractors is actually closer to 90%. Instead of asking the participants about their use of “software”, we asked if the respondents handled each of the 13 tasks “…internally, using a computer”. This was done because we had concerns that the word “software” may be ambiguous to survey participants, for example, if it comes pre-loaded is it viewed as “software”?

**Note: In the cases of Digging/HDD/boring equipment, Aerial lifts/scaffolding, Cranes and Mobile office space, a somewhat higher percentage of firms said that they had *purchased* and/or *rented*/*leased* these types of equipment than had reported *using* them. This could be an error in reporting on the part of participants or it could be that these items were acquired in anticipation of their later use, or some combination of the two. Note that we also observed this type of discrepancy two year ago.

| Tools and Equipment **Used** | Total 2019 | | Total 2017 |
|---|---|---|---|
| | | | |
| | (236) | | (234) |
| | % | | % |
| “Any” | 90 | | 91 |
| Hand tools | 81 | | 82 |
| Power tools | 79 | | 82 |
| Electrical testers, multimeters, etc. | 78 | | 80 |
| Measuring tools (including digital) | 78 | | N/A |
| Fishing tools | 76 | | N/A |
| Phones: smart/mobile/cell or two-way radios/push-to-talk | 71 | | 71 |
| Pipe Threaders, benders, cutters | 70 | | 71 |
| Labeling/identification (cable/panel) | 67 | > | 55 |
| Personal protective equipment, including apparel and accessories | 65 | | 59 |
| Job-site safety equipment | 58 | > | 45 |
| Cable pullers | 54 | | 53 |
| Portable generators | 51 | | 46 |
| Tablets or portable reading devices | 51 | > | 42 |
| Software (e.g. CAD, estimating, procurement, etc.) | 50 | | 45 |
| Aerial lifts/scaffolding | 49 | | 52 |
| Temporary job-site lighting | 48 | | 48 |
| Trailers (to haul equipment/materials) | 46 | > | 39 |
| LAN, datacom, other low-voltage | 37 | | 34 |
| Digging/HDD/boring equipment | 33 | | 26 |
| Thermal imaging | 32 | | 26 |
| Mobile office space (trailers) | 14 | | 13 |
| Cranes | 14 | | 11 |
| 3D scanner | 8 | | 5 |
| Drones | 8 | | 5 |
| 3D printer | 8 | | N/A |
| | | | |
| Estimating | 36 | | 36 |
| Project management | 23 | | 22 |
| CAD | 24 | | 22 |
| Scheduling sales and service | 21 | | 22 |
| Tool and inventory control | 21 | | 19 |
| BIM | 16 | | 11 |

Here is a comparison of software usage when asked in two different ways – by showing a list of 6 types of software and asking if it was used in 2019 or, based on a different series of questions (asked in a different version of the survey). That is, instead of asking the participants about their use of "software", we asked if the respondents handled each of the 13 tasks "…internally, using a computer". This was done because we had concerns that the word "software" may be ambiguous to survey participants, for example, if it comes pre-loaded is it viewed as "software".

Based on the latter way of asking the question on software use and showing a longer list of 13 rather than 6, we believe that software usage by electrical contractors is closer to 90%.

| | Task Handled Internally, Using a Computer (V8) | Software Used in 2019 (V3) | Difference |
|---|---|---|---|
| | (232) | (236) | |
| | % | % | |
| ANY | 86 | 50 | |
| Accounting/Payroll | 64 | | |
| Estimating | 68 | 36 | +32 |
| Job Cost Control/Analysis | 59 | | |
| CAD | 33 | 24 | +9 |
| Take-Off | 51 | | |
| Project Management | 53 | 23 | +30 |
| Time and Attendance Software | 53 | | |
| Tool/Equipment Inventory Control | 33 | 21 | +12 |
| Scheduling Service Work/Logistics | 53 | 21 | +32 |
| Fleet Management/Vehicle Locator | 28 | | |
| BIM (Building Information Modeling) | 22 | 16 | +6 |
| Project Collaboration Software | 35 | | |
| Productivity Software | 58 | | |

In this section we are returning to the full list of 30 types of tools and equipment, rather than focusing solely on software. Note that the vast majority of electrical contracting firms make ***use*** of **multiple** types of tools and equipment, about 90% across the total sample.

- While reported use of 2-3 types of tools is higher among firms with 1-9 employees compared with firms with 10+ employees, there is no difference by company size in use of 4 or more types of tools and equipment.

- The main finding by primary type of work performed is that firms that work primarily on CII projects are significantly more likely to make use of 6 or more types of tools and equipment compared with firms that work primarily on residential projects (89% vs. 75%). Perhaps more important is the high percentage of smaller firms and firms that work primarily on residential construction that make use of 6 or more types of tools and equipment.

| | **Use in Multiple Categories in 2019** | | | | |
|---|---|---|---|---|---|
| | | **Number of Employees** | | **Work Primarily In** | |
| | **Total** | **1-9** | **10+** | **Residential** | **CII** |
| | (236) | (150) | (85) | (84) | (116) |
| | % | % | % | % | % |
| **Any Use** | 90 | 93 | 86 | 89 | 91 |
| Use Only 1 Category | 1 | 1 | 0 | 1 | 1 |
| Use in **Multiple** Categories | 89 | 91 | 86 | 88 | 91 |
| Use in 2 – 3 Categories | 3 | **5 >** | 0 | **7 >** | 1 |
| Use in **4+** Categories | 86 | 87 | 86 | 81 | 90 |
| Use in 4 – 5 Categories | 3 | 3 | 1 | **6 >** | 1 |
| Use in 6+ Categories | 84 | 83 | 85 | 75 | **< 89** |

2017 is shown below for comparison. Note that it 2017, but not in 2019, firms with 10+ employees were significantly more likely to use 6+ types of tools and equipment. Firms that work primarily on CII projects were and are more likely to make use of 6 or more types of tools and equipment.

| | **Use in Multiple Categories in 2017** | | | | |
|---|---|---|---|---|---|
| | | **Number of Employees** | | **Work Primarily In** | |
| | **Total** | **1-9** | **10+** | **Residential** | **CII** |
| | (234) | (162) | (71) | (81) | (107) |
| | % | % | % | % | % |
| **Any Use** | 91 | 90 | 93 | 91 | 93 |
| Use Only 1 Category | 1 | **2 >** | 0 | 1 | 2 |
| Use in **Multiple** Categories | 90 | 88 | 93 | 90 | 90 |
| Use in 2 – 3 Categories | 5 | 6 | 5 | 6 | 5 |
| Use in **4+** Categories | 84 | 83 | 88 | 84 | 85 |
| Use in 4 – 5 Categories | 7 | **10 >** | 1 | **13 >** | 3 |
| Use in 6+ Categories | 78 | 73 | **< 86** | 71 | **< 82** |

## Percent That <u>Purchase</u> Different Types of Tools and Equipment

About eight in ten electrical contractors (84%) reported purchasing tools and equipment in 2019, statistically unchanged from two years earlier.

Hand tools and Power tools continue to top the list.

- In 2019, purchase of 5 these types of tools and equipment rose from their 2017 levels: Electrical testers, multimeters, etc., LAN, datacom, other low-voltage testing equipment, Aerial lifts/scaffolding, Digging/HDD boring equipment and Drones.
    - In contrast, none of the purchase levels declined compared with two years earlier. All of the remaining types of tools and equipment were statistically unchanged or could not be trended because they were just added in the most recent study.
        - These categories are statistically unchanged compared with two years earlier: Hand tools, Power tools, Personal protective equipment (PPE) including apparel and accessories, Phones, Labeling/identification (cable/panel), Pipe threaders, benders, cutters, Job-site safety equipment, Tablets or portable reading devices, Temporary job-site lighting, Cable pullers, Portable generators, Trailers (to haul equipment/materials), Thermal imaging, Mobile office space (trailers), 3D scanners and Cranes.
    - Measuring tools (including digital), Fishing tools and 3D printers were added in 2019 and cannot be trended

| PURCHASE OF TOOLS AND EQUIPMENT | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | **In 2019** | | **In 2017** | | **In 2015** | | **In 2013** | | **In 2011** |
| | **Total** | | **Total** | | **Total** | | **Total** | | **Total** |
| | (236) | | (234) | | (376) | | (374) | | (234) |
| | % | | % | | % | | % | | % |
| **"Any"** Purchase … | 84 | = | 81 | > | 79 | < | **84** | > | 77 |
| Hand tools | 74 | = | 70 | = | 70 | < | **77** | > | 69 |
| Power tools | 68 | = | 66 | = | 70 | = | **72** | > | 64 |
| Electrical testers, multimeters, etc. | **55** | > | 45 | = | 46 | < | **60** | > | 47 |
| Measuring tools (including digital) (first asked in 2020 Profile Study) | 49 | | N/A | | N/A | | N/A | | N/A |
| Fishing tools (first asked in 2020 Profile Study) | 46 | | N/A | | N/A | | N/A | | N/A |
| Personal protective equipment, including apparel and accessories | 43 | = | **42** | > | 31 | < | 44 | = | 41 |
| Phones: smart/mobile/cell or two-way radios/push-to-talk | 43 | = | 37 | = | 37 | < | 47 | = | 42 |
| Labeling/identification (cable/panel) | 36 | = | **34** | > | 22 | < | 33 | = | 27 |
| Pipe Threaders, benders, cutters | 35 | = | **28** | > | 22 | < | 28 | = | 25 |
| Job-site safety equipment | 34 | = | 28 | = | 26 | < | 32 | = | 28 |
| Tablets or portable reading devices | 31 | = | **24** | > | 16 | < | **22** | > | 10 |
| Temporary job-site lighting (first asked in 2016) | 26 | = | **23** | > | 15 | | N/A | | N/A |
| Cable pullers (first asked in 2014 Profile Study) | 25 | = | **19** | > | 10 | < | 14 | | N/A |
| Software (e.g. CAD, estimating, procurement, etc.)[1] | **23** | > | 15 | = | 16 | < | 21 | = | 16 |
| LAN, datacom, other low-voltage | **22** | > | **14** | > | 9 | < | 16 | = | 12 |
| Portable generators (first asked in 2016 Profile Study) | 19 | = | 16 | = | 19 | | N/A | | N/A |
| Trailers (to haul equipment/materials) (first asked in 2016) | 17 | = | **12** | = | 9 | | N/A | | N/A |
| Thermal imaging (first asked in 2014 Profile Study) | 12 | = | 10 | = | 8 | = | 10 | | |
| Aerial lifts/scaffolding | **11** | > | 6 | < | 10 | < | 16 | = | 13 |
| Digging/HDD/boring equipment | **9** | > | 4 | = | 7 | = | 9 | = | 9 |
| Mobile office space (trailers) (first asked in 2016 Profile Study) | 5 | = | 3 | = | 4 | | N/A | | N/A |
| 3D scanner (first asked in 2018 Profile Study) | 5 | = | 2 | | N/A | | N/A | | N/A |
| Drones (first asked in 2018 Profile Study) | **5** | > | 2 | | N/A | | N/A | | N/A |
| 3D printer (first asked in 2020 Profile Study) | 4 | | N/A | | N/A | | N/A | | N/A |
| Cranes (first asked in 2016 Profile Study) | 3 | = | 1 | | 2 | | N/A | | N/A |

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

[1] See additional discussion on the next page

The perceived increase in software purchase is, in part, an artifact of the higher percentage of electrical contractors who took the survey on the Internet in 2020 compared with 2018. Specifically, when we compare the two Internet samples, the increase goes away.

| **Software Purchased in 2019** | **2019** | | **2017** | | **2019** | | **2017** |
|---|---|---|---|---|---|---|---|
| | Total | | Total | | Internet Sample | | Internet Sample |
| | (236) | | (234) | | (218) | | (131) |
| | % | | % | | % | | % |
| Software | 23 | > | 15 | | 24 | = | 19 |
| Estimating | 15 | | 10 | | 16 | | 14 |
| CAD | 12 | > | 6 | | 13 | = | 10 |
| BIM | 9 | > | 4 | | 9 | = | 5 |
| Tool and inventory control | 9 | > | 5 | | 10 | = | 7 |
| Project management | 9 | | 7 | | 10 | | 8 |
| Scheduling sales and service | 8 | | 7 | | 9 | | 9 |

Purchase and rental were not asked in V8 and therefore cannot be shown for comparison here.

## Purchase in Multiple Categories

As has been the case in earlier Profile studies, in 2019, the bulk of electrical contractors made purchases in *multiple* categories (79% in 2019), statistically unchanged compared to two years ago.

- However, significantly more companies report making a 2019 purchase in 4 or more and 6 or more categories while significantly fewer report making a purchase in 2-3 categories.
    - This is in contrast to two years earlier when there were no statistically significant differences between 2017 and 2015.

| PURCHASE IN MULTIPLE CATEGORIES | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | **In 2019** | | **In 2017** | | **In 2015** | | **In 2013** | | **In 2011** |
| | **Total** | | **Total** | | **Total** | | **Total** | | **Total** |
| | (236) | | (234) | | (376) | | (374) | | (234) |
| | % | | % | | **%** | | **%** | | **%** |
| **Any** Purchase | 84 | = | 81 | = | 79 | < | **84** | > | 77 |
| Purchased Only 1 Category | 5 | = | 6 | = | 5 | = | 3 | | 5 |
| | | | | | | | | | |
| Purchase in **Multiple** (2+) Categories | 79 | = | 75 | = | **74** | < | **81** | > | 72 |
| Purchased in 2 – 3 Categories | **13** | < | 22 | = | 21 | = | 20 | | 17 |
| | | | | | | | | | |
| Purchase in **4+** Categories | **66** | ≥ | 53 | = | 53 | ≤ | 61 | | 55 |
| Purchased in 4 – 5 Categories | 13 | = | 16 | = | 18 | = | 19 | | 24 |
| Purchased in 6+ Categories | **53** | > | 37 | = | **35** | < | **42** | > | 31 |

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

## Purchase in Multiple Categories, continued

By number of employees: Those in smaller firms were significantly more likely to have purchased in only 1 category, in 2-3 categories or in 4-5 categories, while those in larger firms are significantly more likely to have purchased in 6+ categories

By primary type of work: Firms that work primarily in CII construction are significantly more likely than those who work primarily on residential projects to have made purchases at all ("Any") and to have made purchases in multiple categories, particularly in 2+, 4+ and 6+ categories.

- Firms that work on primarily residential projects are more likely to have made purchases in 4-5 categories, while firms working primarily on CII projects are significantly more likely to have made purchases in 6+ categories.

| | **PURCHASE IN MULTIPLE CATEGORIES (2019)** | | | | | |
|---|---|---|---|---|---|---|
| | | **Number of Employees** | | | **Work Primarily In** | |
| | | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| | **%** | **%** | **%** | | **%** | **%** |
| **"Any"** Purchase | 84 | 83 | 87 | | 76 | **<91** |
| Purchased Only 1 Category | 5 | **7** > | 1 | | 5 | 5 |
| | | | | | | |
| Purchase in **Multiple** (2+) Categories | 79 | 75 | 86 | | 71 | < **85** |
| Purchased in 2 – 3 Categories | 13 | **18** > | 5 | | 14 | 12 |
| | | | | | | |
| Purchase in **4+** Categories | 66 | 57 | < **81** | | 57 | < **73** |
| Purchased in 4 – 5 Categories | 13 | **15** > | 8 | | **25** > | 4 |
| Purchased in 6+ Categories | 53 | 42 | < **73** | | 32 | < **69** |

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

## Trended Results

There are a few statistically significant differences between 2019 and 2017 in the table shown below.

- Among the total sample, there was a statistically significant drop in the percentage of firms that purchased 2-3 categories while there was a statistically significant increase in the percentage of firms that purchased 4+ and 6+ categories.

- Smaller firms tracked the total sample. Among firms with 1-9 employees, compared with two years earlier: significantly fewer firms made purchases in 2-3 categories while there was a statistically significant increase in smaller firms making purchases in 4+ and 6+ categories.

- However, in contrast to two years earlier, there were no statistically significant differences in purchase levels among firms with 10+ employees.

**PURCHASE in MULTIPLE CATEGORIES (By Firm Size)**

| | **Total Sample** | | | | **1-9 Employees** | | | | **10+ Employees** | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **2019** | **2017** | **2015** | **2013** | **2019** | **2017** | **2015** | **2013** | **2019** | **2017** | **2015** | **2013** |
| | (236) | (234) | (376) | (374) | (150) | (162) | (278) | (282) | (85) | (71) | (98) | (91) |
| | % | % | % | % | % | % | % | % | % | % | % | % |
| **Any** Purchase | 84 | 81 | 79 | < **84** | 83 | 78 = | 81 | < **87** | 87 | **87** > | 74 | 78 |
| Only 1 Category | 5 | 6 | 5 | 3 | **7** | 9 = | 5 | 4 | 1 | 0 = | **3** > | 0 |
| | | | | | | | | | | | | |
| In **Multiple Categories** | 79 | 75 | **74** | < **81** | 75 | 69 = | 75 | < **83** | 86 | **87** > | 71 = | 78 |
| In 2 – 3 Categories | 13 | < **22** | 21 | 20 | **18** | < **27 =** | 25 | 25 | 5 | 10 | 10 | 8 |
| | | | | | | | | | | | | |
| In **4+** Categories | **66** > | 53 | 53 | < **61** | **57** > | **42** | < **51** | 58 | 81 | **77** > | 61 = | 70 |
| In 4 – 5 Categories | 13 | 16 | 18 | 19 | 15 | 18 = | 21 | 24 | 8 | 11 | 10 = | 5 |
| In 6+ Categories | **53** > | 37 | 35 | < **42** | **42** > | 24 = | 30 | 34 | 73 | **66** > | 51 | < **65** |

**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 2019, as was the case in 2017, six in ten electrical contractors (60%) *rented/leased* equipment. Note that in 2015 and 2013, 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 (60%)[2] than through outright purchase (84%).

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.

- Compared with two years earlier, rental/lease levels increased significantly only for two categories -- Cranes (the third most leased category) and Power tools, and for one type of software – Estimating software (shown on the following page). In the case of rental/lease of Estimating software, the increase holds even when we compare the Internet samples in 2020 to that of 2018.
    - Note that in the case of Cranes, first introduced in the 2016 Profile Study – rental/ lease also increased between 2015 and 2017.

Rental/lease levels did not decline for any of the types of tools and equipment studied between 2019 and 2017.

[2] The 2020 list included three new categories – 3D printers, Fishing tools and Measuring tools (including digital)– but the level of rental/ lease was low. In fact the net without those three new categories was 59%. That is, we do not believe that the new categories had much of an effect on the 60% net.

| RENTAL/LEASE OF TOOLS AND EQUIPMENT | | | | | | | |
|---|---|---|---|---|---|---|---|
| | **In 2019** | | **In 2017** | | **In 2015** | | **In 2013** |
| | **Total** | | **Total** | | **Total** | | **Total** |
| | (236) | | (234) | | (376) | | (374) |
| | % | | % | | % | | % |
| **"Any"** Lease/Rental… | 60 | = | **57** | > | 37 | | 40 |
| Aerial lifts/scaffolding | 45 | = | **46** | > | 28 | | 29 |
| Digging/HDD/boring equipment | 34 | = | **28** | > | 12 | = | 16 |
| Cranes | **25** | > | **17** | > | 6 | | N/A |
| Mobile office space (trailers) | 14 | = | **12** | > | 6 | | N/A |
| Portable generators | 13 | = | **11** | > | 4 | | N/A |
| Power Tools | **12** | > | **8** | > | 4 | < | **7** |
| Trailers (to haul equipment/materials) | 9 | = | 8 | > | 3 | | N/A |
| Cable pullers | 8 | = | **8** | > | 3 | | 4 |
| Job-site safety equipment | 7 | = | **6** | > | 1 | | 4 |
| Pipe threaders, benders, cutters | 6 | = | **5** | > | 2 | | 5 |
| Hand tools | 6 | = | 4 | = | 2 | < | **5** |
| Thermal imaging | 5 | = | **4** | > | 1 | < | **3** |
| Temporary job-site lighting | 5 | = | 4 | = | 2 | | N/A |
| Software | 4.2 | = | **2.6** | > | 0.9 | | 1 |
| Electrical testers, multimeters, etc. | 3 | = | 4 | = | 2 | | 3 |
| Phones: smart/mobile/cell or two-way radios/push-to-talk | 3 | = | **3** | > | 0.8 | < | **3** |
| Personal protective equipment, including apparel and accessories | 3 | = | 2 | = | 0.6 | | 1 |
| Fishing tools | 3 | | N/A | | N/A | | N/A |
| LAN, datacom, other low-voltage | 2 | = | **2.8** | > | 0.6 | | 1 |
| 3D scanner | 2 | = | 1.6 | | N/A | | N/A |
| Measuring tools (including digital) | 2 | | N/A | | N/A | | N/A |
| 3D printer | 2 | | N/A | | N/A | | N/A |
| Tablets | 1.7 | = | 0.4 | = | 1 | | 1 |
| Drones | 1.7 | = | 0.4 | | N/A | | N/A |
| Labeling/identification (cable/panel) | 1.3 | = | 0.4 | = | 0.6 | | 1 |
| | | | | | | | |
| Estimating[3] | 2.5 | > | 0.5 | | | | |
| CAD | 2 | | 2 | | | | |
| BIM | 2 | | 1 | | | | |
| Tool and inventory control | 0.8 | | 0.5 | | | | |
| Project management | 0.8 | | 0.5 | | | | |
| Scheduling sales and service | 0.8 | | 0.9 | | | | |

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

[3] This difference holds up even when the Internet sample in 2019 is compared with Internet sample in 2017.

## Rental/Lease in Multiple Categories

Among the total sample, 46% of electrical contractors rented/leased in two or more categories, statistically unchanged from the 41% observed two years ago.

| RENTAL/LEASE IN MULTIPLE CATEGORIES | | | | | | | |
|---|---|---|---|---|---|---|---|
| | **2019** | | **2017** | | **2015** | | **2013** |
| | (236) | | (234) | | (376) | | (374) |
| | % | | % | | % | | % |
| **Any Lease/Rental** | 60 | = | **57** | > | 37 | | 40 |
| **Only 1 Category** | 14 | = | 16 | = | 18 | = | 21 |
| | | | | | | | |
| Lease/Rent in **Multiple/2+** Categories | **46** | = | **41** | > | 19 | = | 19 |
| **In 2 Categories** | 13 | = | **14** | > | 8 | = | 10 |
| **In 3+ Categories** | **33** | = | **27** | > | 11 | = | 9 |

- 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 more involved in larger, more complex and sophisticated projects that require *more different types* of tools and equipment.

  - Note that 25% of the smaller companies (those with 1-9 employees) rented/leased in 3+ categories compared to 49% of firms with 10+ employees.

| | **In 2019** | | | | | |
|---|---|---|---|---|---|---|
| | | **Number of Employees** | | | **Work Primarily In** | |
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| | % | % | % | | % | % |
| **Any Lease/Rental** | 60 | 51 | **< 75** | | 41 | **< 76** |
| **Only 1 Category** | 14 | 15 | 12 | | 10 | 16 |
| | | | | | | |
| Lease/Rent in **Multiple /2+** Categories | 46 | 37 | **< 64** | | 31 | **< 60** |
| **In 2 Categories** | 13 | 12 | 14 | | 17 | 10 |
| **In 3+ Categories** | 33 | 25 | **< 49** | | 14 | **< 50** |

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

## Lease/Rental in Multiple Categories, continued

Trended: There are no statistically significant differences among the total sample or by company size compared with two years ago. However, this indicates that rental/lease levels retained the higher levels observed two years ago.

- In contrast, when 2017 is compared to 2015, there were statistically significant increases among the total sample as well as among firms with 1-9 employees and among firms with 10+ employees. This is consistent with the general level of renting/leasing increasing between 2015 and 2017.

**RENTAL/LEASE in MULTIPLE CATEGORIES (By Firm Size)**

| | **Total Sample** | | | | | **1-9 Employees** | | | | | **10+ Employees** | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **2019** | **2017** | **2015** | **2013** | | **2019** | **2017** | **2015** | **2013** | | **2019** | **2017** | **2015** | **2013** |
| | **(236)** | **(234)** | **(376)** | **(374)** | | (150) | (162) | (276) | (282) | | (85) | (71) | (98) | (91) |
| | **%** | **%** | **%** | **%** | | **%** | % | **%** | **%** | | **%** | **%** | **%** | **%** |
| **"Any" Lease/Rental** | 60 | **57** > | 37 | 40 | | 51 | **47** > | 33 | 36 | | 75 | **81** > | **48** | 51 |
| **Only 1 Category** | 14 | 16 | 18 | 21 | | 15 | 17 | 19 | 20 | | 12 | 13 | 13 | < **23** |
| | | | | | | | | | | | | | | |
| Lease/Rent in **Multiple/2+** Categories | 46= | **41** > | 19 | 19 | | 37 | **30** > | 14 | 16 | | 64 | **68** > | **35**▲ | 28 |
| **In 2 Categories** | 13 | **14** > | 8 | 10 | | 12 | 12 = | 8 | 10 | | 14 | **19** > | 10 | 12 |
| **In 3+ Categories** | 33 = | **27** > | 11 | 9 | | 25 | **18** > | 6 | 6 | | 49 | **49** > | **25**▲ | 16 |

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

**▲ Not significant on this base size**

Before we delve into the individual types of tools and equipment, here is an overview of use of the tools and equipment measured in this survey and with the method of obtaining each in 2019. As noted a few pages earlier, there are a small number of areas, including – Cranes, Digging/HDD/boring equipment, Aerial lifts, Cranes and Mobile office space -- where a higher percentage said that they made a 2019 *purchase* and/or *rental/lease* than say that their firm *used* this type of equipment in 2019. This could be an error in reporting on the part of participants or it could be that these items were acquired in anticipation of their later use or some combination of the two.

| | **Use in 2019** | **Purchase in 2019** | **Lease/ Rent in 2019** | **Purchase or Lease/Rent in 2019** | **Use Vs. Obtained (A minus D)** |
|---|---|---|---|---|---|
| | **A** | **B** | **C** | **D** | **E** |
| | **Total** | **Total** | **Total** | **Total** | **Total** |
| | **(236)** | **(236)** | **(236)** | **(236)** | **(236)** |
| | **%** | **%** | **%** | **%** | **%** |
| **"Any" …** | 90 | 84 | 60 | 87 | 3 |
| Hand tools | 81 | 74 | 6 | 75 | 6 |
| Power tools | 79 | 68 | 12 | 69 | 10 |
| Electrical testers, multimeters, etc. | 78 | 55 | 3 | 56 | 22 |
| Measuring tools (including digital) | 78 | 49 | 2 | 49 | 29 |
| Fishing tools | 76 | 46 | 3 | 47 | 29 |
| Phones: smart/mobile/cell or two-way radio/push-to-talk | 71 | 43 | 3 | 44 | 27 |
| Pipe threaders, benders, cutters | 70 | 35 | 6 | 38 | 32 |
| Labeling/identification (cable/panel) | 67 | 36 | 1 | 36 | 31 |
| Personal protective equipment, including apparel and accessories | 65 | 43 | 3 | 43 | 22 |
| Job-site safety equipment | 58 | 34 | 7 | 38 | 20 |
| Cable pullers | 54 | 25 | 8 | 30 | 24 |
| Tablets or portable reading devices | 51 | 31 | 2 | 31 | 20 |
| Portable generators | 51 | 19 | 13 | 28 | 23 |
| Aerial lifts/scaffolding | 49 | 11 | 45 | 51 | -2 |
| Temporary job-site lighting | 48 | 26 | 5 | 28 | 20 |
| Trailers (to haul equipment/materials) | 46 | 17 | 9 | 23 | 23 |
| LAN, datacom, other low-voltage | 37 | 22 | 2 | 22 | 15 |
| Estimating software | 36 | 15 | 3 | 16 | 20 |
| Digging/HDD/boring equipment | 33 | 9 | 34 | 39 | -6 |
| Thermal imaging | 32 | 12 | 5 | 16 | 16 |
| CAD software | 24 | 12 | 2 | 12 | 12 |
| Project management software | 23 | 9 | 1 | 9 | 14 |
| Tool and inventory control software | 21 | 9 | 1 | 9 | 12 |
| Scheduling sales and services software | 21 | 8 | 1 | 8 | 13 |
| BIM software | 16 | 9 | 2 | 9 | 7 |
| Mobile office space (trailers) | 14 | 5 | 14 | 16 | -2 |
| Cranes | 14 | 3 | 25 | 27 | -13 |
| 3D scanner | 8 | 5 | 2 | 6 | 2 |
| Drones | 8 | 5 | 2 | 6 | 2 |
| 3D printer | 8 | 4 | 2 | 6 | 2 |

## Tools:

### Hand Tools Purchase and Rental/Lease Behavior

74% of respondent firms made a purchase in the Hand tools category in 2019, statistically unchanged compared with 2017. 6% said that their firm obtained Hand tools through rental/lease, also statistically unchanged compared with two years earlier.

**HAND TOOLS (2019 Trended)**

| | **In 2019** | | **In 2017** | | **In 2015** | | **In 2013** | | **In 2011** |
|---|---|---|---|---|---|---|---|---|---|
| | **Total** | | **Total** | | **Total** | | **Total** | | **Total** |
| | (236) | | (234) | | (376) | | (374) | | (234) |
| Purchase Level | 74% | = | **70%** | = | **70%** | < | **77%** | > | 69% |
| Rental/Lease | 6.4% | = | 3.5% | | | | | | |

- In 2019, there were no subgroup differences by number of employees in terms of purchase or rental/lease. Firms that work primarily on CII projects are significantly more likely to report hand tool purchases, compared with firms that work primarily on residential projects. However, there is no difference by primary type of construction activity on the rental/lease of hand tools.

**HAND TOOLS (2019 by Subgroups)**

| | | **Number of Employees** | | | **Work Primarily In** | |
|---|---|---|---|---|---|---|
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| Purchase Level | 74% | 73% | 78% | | 66% | **< 81%** |
| Rental/Lease | 6.4% | 6.7% | 5.9% | | 7.1% | 6.0% |

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

## Trended Results

- Both *purchase* and *rental/lease* levels are statistically unchanged compared to two years earlier in total (shown on the preceding page), by number of employees and among firms working primarily in residential construction. However, there was a statistically significant increase in the purchase level of hand tools among firms working primarily on CII projects compared with two years earlier.

| **HAND TOOLS (2019 By Subgroups Trended)** | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | **Number of Employees** | | | | **Work Primarily In…** | | | |
| | **1-9** | | **10+** | | **Residential** | | **CII** | |
| | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** |
| | (150) | (162) | (85) | (71) | (84) | (81) | (116) | (107) |
| Purchase Level | 73% | 70% | 78% | 71 | 66% | 74% | **81% >** | 71% |
| Rental/Lease | 6.7% | 2.9% | 5.9% | 5.2% | 7.1% | 3.2% | 6.0% | 3.6% |

## Estimates and Projections: Hand Tools

**ALL INDUSTRY ESTIMATE OF 2019 FIRMS PURCHASING AND RENTING/LEASING: HAND TOOLS**

| | Percent of Respondent Firms Buying or Renting | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Buying or Rented |
|---|---|---|---|
| **Hand tools** | % | # | # |
| Purchase | 74.2 | 75,381 | **55,933** |
| Rental/Lease | 6.4 | 75,381 | **4,824** |

## Power Tools Purchase and Rental/Lease Behavior

68% of electrical contracting firms reported making a 2019 purchase of Power tools. This purchase level is statistically unchanged from the 2017 purchase level of 66%.

- 12% of electrical contractors reported renting or leasing Power tools in 2019. This is a statistically significant increase versus two years earlier and is significantly higher than any level since 2013.

| POWER TOOLS (2019 Trended) | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | **In 2019** | | **In 2017** | | **In 2015** | | **In 2013** | | **In 2011** |
| | **Total** | | **Total** | | **Total** | | **Total** | | **Total** |
| | (236) | | (234) | | (376) | | (374) | | (234) |
| | **%** | | **%** | | **%** | | **%** | | **%** |
| Purchase | 68 | = | 66 | = | 70 | = | 72 | > | 64 |
| | | | | | | | | | |
| Rental/Lease | **12.3** | > | **7.5** | > | 4 | < | **7** | = | 10 |

Purchase: In 2019, larger firms (10+ employees) and firms that work primarily on CII projects were significantly more likely to report making a 2019 Power tools purchase compared with firms with 1-9 employees and/or firms who work primarily on residential projects.

Rental/Lease: In 2019, firms that work primarily on CII are also more likely than firms that work primarily on residential construction to obtain Power tools through rental or lease. However, there was no difference in rental or lease of Power tools by number of employees.

| POWER TOOLS (2019 by Subgroups) | | | | | | |
|---|---|---|---|---|---|---|
| | **Number of Employees** | | | | **Work Primarily In** | |
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| PURCHASE | **%** | **%** | **%** | | **%** | **%** |
| Purchase | 68 | 63 | **< 77** | | 55 | **< 77** |
| | | | | | | |
| Rental/Lease | 12 | 10 | 17 | | 5 | **< 18** |

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

**Trended Results**

Compared with two years ago, *purchase* levels among the total sample, among firms with 1-9 and with 10+ employees are all statistically unchanged.

Compared to two years ago, 2019 *rental/lease* levels increased among the total sample (shown on the previous page) and among firms working primarily on CII projects.

| POWER TOOLS (2019 By Subgroups Trended) | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Number of Employees** | | | | | | **Work Primarily In** | | | | | |
| | **1-9** | | | **10+** | | | **Residential** | | | **CII** | | |
| | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** |
| | (150) | (162) | (278) | (85) | (71) | (98) | (84) | (81) | (146) | (116) | (107) | (172) |
| Purchase Level | 63% | 62% | < **71%** | 77% | 76% | 68% | 55% | 67% | < 77% | 77% | 73% | 67% |
| | | | | | | | | | | | | |
| Rental/Lease | 10% | 5.2% | 3.9% | 17% | **13%** > | 5.4% | 5% | 6% | 3.1% | **18%>** | **10%>** | 4.7% |

**Estimates and Projections: Power Tools**

**ALL INDUSTRY ESTIMATE OF NUMBER OF 2019 FIRMS PURCHASING AND RENTING/LEASING: POWER TOOLS**

| | Percent of Respondent Firms Buying or Renting | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Buying or Renting |
|---|---|---|---|
| **Power tools** | % | | |
| Purchase | 67.8 | 75,381 | **51, 108** |
| Rental/Lease | 12.3 | 75,381 | **9,272** |

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

49% of electrical contracting firms purchased Measuring tools (including digital) in 2019; 1.75% rented or leased in this category in 2019.

Purchase levels are significantly higher among firms that work primarily on CII projects. However, there is no difference by number of employees.

Rental/lease levels: Although at low levels, rental/lease levels are higher among firms with 10+ employees and/or those that work primarily on CII projects. Because rental/lease is so low in this category it will not be included in the rest of this section.

This category cannot be trended since it was first asked about in the most recent Profile study.

**MEASURING TOOLS (INCLUDING DIGITAL) 2019**
**(By Firm Size and Primary Work Type)**

| | In 2019 | | | | | |
|---|---|---|---|---|---|---|
| | | Number of Employees | | | Work Primarily In | |
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| | **%** | **%** | **%** | | **%** | **%** |
| Purchase Level | 49.2 | 46 | 55 | | 41 | < **57** |
| Rental/Lease | 1.7 | 0 | < **4.7** | | 0 | < **3.4** |

**ALL INDUSTRY ESTIMATE OF 2019 NUMBER OF FIRMS PURCHASING:**
**MEASURING TOOLS (INCLUDING DIGITAL)**

| | Percent of Respondent Firms Buying or Renting | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Buying or Renting |
|---|---|---|---|
| **Measuring Tools** | % | # | # |
| Purchase | 49.2 | 75,381 | **37,087** |

## Fishing Tools Purchase and Rental/Lease Behavior

46% of electrical contracting firms purchased Fishing tools in 2019; 2.5% rented or leased in this category in 2019.

Purchase levels are significantly higher among firms that work primarily on CII projects. However, there is no difference by number of employees.

Rental/lease levels: There are no statistically significant differences by any of the subgroups shown below. Because rental/lease is so low in this category it will not be included in the rest of this section.

This category cannot be trended since it was first asked about in the most recent Profile study.

**FISHING TOOLS 2019**
**(By Firm Size and Primary Work Type)**

| | In 2019 | | | | |
|---|---|---|---|---|---|
| | | Number of Employees | | Work Primarily In | |
| | **Total** | **1-9** | **10+** | **Residential** | **CII** |
| | (236) | (150) | (85) | (84) | (116) |
| | **%** | **%** | **%** | **%** | **%** |
| Purchase Level | 46 | 43 | 52 | 38 | **< 53** |
| Rental/Lease | 2.5 | 1.3 | (<) 4.7 | 2.4 | 2.6 |

(> or <) just short of statistical significance

**ALL INDUSTRY ESTIMATE OF 2019 NUMBER OF FIRMS PURCHASING:**
**FISHING TOOLS**

| | Percent of Respondent Firms Buying or Renting | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Buying or Renting |
|---|---|---|---|
| **Fishing Tools** | % | # | # |
| Purchase | 46.2 | 75,381 | **34,826** |

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

35% of electrical contracting firms purchased Pipe threaders/benders/cutters in 2019. The percentage difference compared with two years earlier, when it was 28%, is just short of statistical significance.

5.9% said that their firm obtained Pipe threaders/benders/cutters through rental/lease, which is statistically unchanged compared with two years earlier.

**PIPE THREADERS/BENDERS/CUTTERS (2019 Trended)**

| | In 2019 | | In 2017 | | In 2015 | | In 2013 | | In 2011 |
|---|---|---|---|---|---|---|---|---|---|
| | **Total** | | **Total** | | **Total** | | **Total** | | **Total** |
| | (236) | | (234) | | (376) | | (374) | | (234) |
| | % | | % | | % | | % | | % |
| Purchase | 35 | (>) | **28** | > | 22 | < | **28** | | 25 |
| Rental/Lease | 5.9 | = | **4.8** | > | 2.3 | | | | |

(> or <) just short of statistical significance

In 2019, 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 2019, firms that work primarily on CII projects are also more likely than firms that work primarily on residential projects to have obtained Pipe threaders/benders/cutters through *rental/lease*. However, there is no difference by number of employees in terms of 2019 rental/lease likelihood.

**PIPE THREADERS/BENDERS/CUTTERS (2019 by Subgroups)**

| | | Number of Employees | | | Work Primarily In | |
|---|---|---|---|---|---|---|
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| | **%** | **%** | **%** | | **%** | **%** |
| Purchase | 35 | 26 | **< 51** | | 14 | **< 50** |
| Rental/Lease | 5.9 | 4 | 9 | | 2 | **< 9** |

**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, both *purchase* and *rental/lease* levels are statistically unchanged among the total sample compared with two years earlier. However, as shown below, there was a significant increase in purchasing by smaller firms (1-9 employees).

Compared with two years ago, there are no other statistically significant differences by the subgroups shown below either in terms of purchase or rental/lease of Pipe threaders/benders/cutters.

| PIPE THREADERS/BENDERS/CUTTERS (2019 by Subgroups Trended) | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Number of Employees** | | | | | | **Work Primarily In…** | | | | | |
| | **1-9** | | | **10+** | | | **Residential** | | | **CII** | | |
| | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** |
| | (150) | (162) | (278) | (85) | (71) | (98) | (84) | (81) | (146) | (116) | (107) | (172) |
| Purchase Level | **26%** > | 16% | 14% | 51% | 57% | 47% | 14% | 13% | 17% | 50% | **40%**> | 28% |
| Rental/Lease | 4% | 4.1% | 1.9% | 9.4% | 6.4 | 3.3% | 2.4% | **4.3%**> | 0% | 8.6% | 4.5% | 4.3% |

**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 2019 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: PIPE THREADERS, BENDERS, CUTTERS**

| | Percent of Respondent Firms Buying or Renting | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Buying or Renting |
|---|---|---|---|
| **Pipe threaders, benders, cutters** | % | # | # |
| Purchase | 34.7 | 75,381 | **26, 157** |
| Rental/Lease | 5.9 | 75,381 | **4,447** |

## Cable Pullers Purchase and Rental/Lease Behavior

25% of electrical contracting firms purchased Cable pullers in 2019, which is statistically unchanged vs. the 2017 level of 19%. The percentage of electrical contracting firms renting/leasing, at 8%, is also statistically unchanged compared with two years ago.

| CABLE PULLERS (2019) | | | | | |
|---|---|---|---|---|---|
| | **In 2019** | | **In 2017** | | **In 2015** |
| | **Total** | | **Total** | | **Total** |
| | (236) | | (234) | | (376) |
| Purchase | 25% | = | **19%** | > | 10% |
| Rented/Leased | 8.1% | = | **8.2%** | > | 2.7% |

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

Larger firms and/or those that work primarily on CII projects are significantly more likely to have obtained Cable pullers in the previous year by *purchase* compared with smaller firms and/or those that work primarily on residential projects.

Larger firms are also more likely than smaller firms to have obtained Cable pullers through *rental/lease* compared with smaller firms. However, in 2019, there was no difference in the likelihood to rent or lease Cable pullers by the primary type of work performed.

| CABLE PULLERS (2019 by Subgroups) | | | | | |
|---|---|---|---|---|---|
| | | **Number of Employees** | | **Work Primarily In** | |
| | **Total** | **1-9** | **10+** | **Residential** | **CII** |
| | (236) | (150) | (85) | (84) | (116) |
| | **%** | **%** | **%** | **%** | **%** |
| Purchase | 25 | 13 | < **46** | 5 | < **38** |
| Rented/Leased | 8 | 5 | < **13** | 6 | 10 |

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

### Trended Results

Compared to two years ago, there are no statistically significant differences in purchase or rental /lease of Cable pullers either by number of employees or by primary type of work performed. As shown on the preceding page, nor was there any difference when comparing the total sample with results from two years ago.

| CABLE PULLERS (2019 Trended) | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Number of Employees** | | | | | | **Work Primarily In…** | | | | | |
| | **1-9** | | | **10+** | | | **Residential** | | | **CII** | | |
| | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** |
| | (150) | (162) | (278) | (85) | (71) | (98) | (84) | (81) | (146) | (116) | (107) | (172) |
| Purchase Level | 13% | **10%** > | 5% | 46% | **41%** > | 24% | 4.8% | 4.9% | 7% | 38% | **29%**> | 14% |
| Rental/Lease | 5.3% | 4.3% | 3% | 13% | **18%** > | 1.7% | 6% | 3.5% | 3.5% | 10% | **11%**> | 2.9% |

### Estimates and Projections: Cable Pullers

**ALL INDUSTRY ESTIMATE OF 2019 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: CABLE PULLERS**

| | Percent of Respondent Firms Buying or Renting | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Buying or Renting |
|---|---|---|---|
| **Cable pullers** | % | # | # |
| Purchase | 24.6 | 75,381 | **18, 544** |
| Rental/Lease | 8.1 | 75,381 | **6,106** |

## 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 through *rental/lease* than through *purchase.* Mobile office space also falls into this category, but the difference between renting/leasing and purchase is less than 10 percentage points.

- In contrast, however, Personal protective equipment, Job-site safety equipment and Temporary job-site lighting are far more likely to be purchased rather than rented/leased.
    - In all other cases – Mobile office space (trailers), Trailers to haul equipment/materials and Portable generators – the difference between renting/lease and purchase is less than 10 percentage points.

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

| 2019 Rental/Lease to Purchase Comparison | | |
|---|---|---|
| | **Rental/Lease** | **Purchase** |
| | **2019** | **2019** |
| | (236) | (236) |
| | **%** | **%** |
| **"Any" Purchase/Lease …** | | |
| Aerial lifts/scaffolding | **45** | 11 |
| Digging/HDD/boring equipment | **34** | 9 |
| Cranes | **25** | 3 |
| | | |
| Mobile office space (trailers) | **14** | 5 |
| Trailers (to haul equipment/materials) | 9 | **17** |
| Portable generators | 13 | **19** |
| | | |
| Personal protective equipment, including apparel and accessories | 3 | **43** |
| Job-site safety equipment | 7 | **34** |

| | | |
|---|---|---|
| Temporary job-site lighting | 5 | **26** |

**Trended Results**

- *Rental/lease* levels jumped dramatically and significantly for only one category – Cranes, compared with two years earlier. Rental/lease in all of the other categories remained statistically unchanged compared with two years earlier.

.

- In contrast, the percentage making a past year *purchase* of Aerial lifts/scaffolding increased significantly, returning to the 2015 level. Purchase of Digging/HDD/boring equipment rose compared with two years earlier and returned to its 2013-2011 purchase level. Purchase levels in all of the other categories remain statistically unchanged compared with two years earlier.

| | **Rental/Lease Comparisons Trended** | | | | | | **Purchase Comparison Trended** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **2019** | **2017** | **2015** | **2013** | **2011** | | **2019** | **2017** | **2015** | **2013** | **2011** |
| | (236) | (234) | (376) | (374) | (234) | | (236) | (234) | (376) | (374) | (234) |
| | **%** | **%** | **%** | **%** | **%** | | **%** | **%** | **%** | **%** | **%** |
| **“Any” Purchase/Rental/Lease …** | | | | | | | | | | | |
| Aerial lifts, scaffolding | 45 | **46** > | 28 | 29 | 29 | | **11** > | 6 | < **10** | < **16** = | 13 |
| Digging/HDD/boring equipment | 34 | **28** > | 12 = | 16 | < **27** | | **9** > | 4 = | 7 = | 9 | 9 |
| Cranes* | **25** > | **17** > | 6 | NA | NA | | 3 | 1 = | 2 | NA | NA |
| Mobile office space (trailers)* | 14 | **12** > | 6 | NA | NA | | 5 | 3 = | 4 | NA | NA |
| Portable generators* | 13 | **11** > | 4 | NA | NA | | 19 | 16 = | 19 | NA | NA |
| Trailers (to haul equipment/materials)* | 9 | **8** > | NA | NA | NA | | 17 | 12 = | 9 | NA | NA |

* 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 2019, 45% of firms obtained Aerial lifts/scaffolding through *rental/lease* and 11% through *purchase*.

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

- Purchase: In contrast to the rental/lease results, the percentage making a *purchase* in 2019 increased significantly from 2017, returning to its 2015 level. This is the first time that purchase levels rose since 2013.

| Aerial Lifts/Scaffolding (2019 Trended) | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | **In 2019** | | **In 2017** | | **In 2015** | | **In 2013** | | **In 2011** |
| | **Total** | | **Total** | | **Total** | | **Total** | | **Total** |
| | (236) | | (234) | | (376) | | (374) | | (234) |
| Rental/Lease | 45% | = | **46%** | > | 28% | | 29% | | 29% |
| Purchase | **11%** | > | 6% | < | **10%** | < | **16%** | = | 13% |

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 2019.

Purchase: Larger firms were more likely than smaller firms to have purchased Aerial lifts/scaffolding in 2019. However, there is no difference in *purchase* of Aerial lifts/scaffolding by the primary type of work performed.

| AERIAL LIFTS/SCAFFOLDING RENTAL/LEASE and PURCHASE (By Firm Size and Primary Work Type)_2019 | | | | | | |
|---|---|---|---|---|---|---|
| | | **Number of Employees** | | | **Work Primarily In** | |
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| | % | % | % | | % | % |
| Rental/Lease | 45 | 37 | **< 59** | | 26 | **< 62** |
| Purchase | 11 | 6 | **< 20** | | 7 = | 13 |

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

## Trended Results

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

- Purchase: In contrast, there has been a statistically significant increase in the purchase of Aerial lifts/scaffolding among smaller firms and/or those that work primarily on residential projects.

**AERIAL LIFTS AND SCAFFOLDING (2019 Trended)**

| | Number of Employees | | | | | | Work Primarily In… | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1-9 | | | 10+ | | | Residential | | | CII | | |
| | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** |
| | (150) | (162) | (278) | (85) | (71) | (98) | (84) | (81) | (146) | (116) | (107) | (172) |
| Rental/Lease | 37% = | **38% >** | 23% | 59% = | **64% >** | 40% | 26% = | 28% = | 19% = | 62% = | **55% >** | 37% |
| Purchase | **6% >** | 1.2% | **< 9%** | 20% = | 18% = | 13% | **7% >** | 1.1% | **< 8%** = | 13% = | 11% = | 12% |

## Estimates and Projections: Aerial Lifts/Scaffolding

**ALL INDUSTRY ESTIMATE OF 2019 NUMBER OF FIRMS RENTING/LEASING AND PURCHASING AERIAL LIFTS/SCAFFOLDING**

| | Percent of Respondent Firms Renting or Buying | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Renting or Buying |
|---|---|---|---|
| **Aerial lifts/scaffolding** | % | # | # |
| Rental/Lease | 44.9 | 75,381 | **33,846** |
| Purchase | 11.0 | 75,381 | **8,292** |

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

In 2019, 34% of electrical contracting firms obtained Digging/HDD/boring equipment through *rental/lease* and 8.5% through *purchase*.

- Compared with two years earlier, rental/lease levels are statistically unchanged while the percentage that purchased Digging/HDD/boring equipment doubled to 8.5% from 4.2%, a statistically significant increase.

| DIGGING/HDD/BORING EQUIPMENT (2019 Trended) | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | **In 2019** | | **In 2017** | | **In 2015** | | **In 2013** | | **In 2011** |
| | **Total** | | **Total** | | **Total** | | **Total** | | **Total** |
| | (236) | | (234) | | (376) | | (374) | | (234) |
| Rental/Lease | 34% | = | **28%** | > | 12% | = | 16% | < | **27%** |
| Purchase | **8.5%** | > | 4.2% | = | 7% | = | 9% | = | 9% |

Rental/Lease: Firms that work primarily on CII projects are more likely than those that work primarily on residential projects to rent/lease Digging/HDD/boring equipment, However, there is no difference by firm size.

Purchase: Larger electrical contracting firms and/or those that work primarily on CII projects are more likely than smaller electrical contracting firms and/or those that work primarily on residential projects to purchase Digging/HDD/boring equipment.

| DIGGING/HDD/BORING EQUIPMENT RENTAL/LEASE and PURCHASE (2019 by Subgroups) | | | | | | |
|---|---|---|---|---|---|---|
| | | **Number of Employees** | | | **Work Primarily In…** | |
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| | **%** | **%** | **%** | | **%** | **%** |
| Rental/Lease | 34 | 31 | 41 | | 24 | **< 46** |
| Purchase | 8.5 | 3.3 | **< 18** | | 2.4 | **< 10** |

**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 with two years earlier, there is no difference in *rental/lease* level among the total sample or, as shown below, by number of employees or among firms that work primarily on residential projects. However, compared to two years earlier, there was an increase in rental/lease among firms that work firms that work primarily on CII projects.

- *Purchase* levels rose among the total sample, driven by firms with 10+ employees. However, there is no difference among smaller firms or by primary type of work performed.

| DIGGING/HDD/BORING EQUIPMENT (2019 By Subgroups Trended) | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Number of Employees** | | | | | | **Work Primarily In...** | | | | | |
| | **1-9** | | | **10+** | | | **Residential** | | | **CII** | | |
| | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** |
| | (150) | (162) | (278) | (85) | (71) | (98) | (84) | (81) | (146) | (116) | (107) | (172) |
| Rental/Lease | 31% = | **25% >** | 9% | 41% = | **36% >** | 20% | 24% = | **23% >** | 10% | **46% >** | **31% >** | 13% |
| Purchase | 3.3% = | 2.6% = | 6% | **18% >** | 8% = | 12% | 2.4% = | 1.4% = | 6% | 10% = | 6% | 8% |

**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 2019 NUMBER OF FIRMS RENTING/LEASING AND PURCHASING DIGGING/HDD/BORING EQUIPMENT**

| | Percent of Respondent Firms Renting or Buying | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Renting or Buying |
|---|---|---|---|
| **DIGGING/HDD/ BORING EQUIPMENT** | % | # | # |
| Rental/Lease | 34.3 | 75,381 | **25,856** |
| Purchase | 8.5 | 75,381 | **6,407** |

## Cranes Rental/Lease and Purchase Behavior

25% of electrical contractors obtained Cranes in 2019 through *rental/lease* and 2.5% through *purchase*.

- The percentage of electrical contractors who obtain Cranes through *rental/lease* rose significantly from 17% in 2017, which itself represents a dramatic and significant rise from the 2015 level of 6.5% (Results from 2015 are not shown below.)
- However, the percentage making a *purchase*, at 2.5 % is statistically unchanged compared with 2017 and with 2015, when it was 2% (Results from 2015 are not shown below).

| CRANES (2019 Trended) | | | |
|---|---|---|---|
| | **In 2019** | | **In 2017** |
| | **Total** | | **Total** |
| | (236) | | (234) |
| | **%** | | **%** |
| Rental/Lease | **25** | > | 17 |
| Purchase | 2.5 | = | 1.2 |

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.

The same holds true for purchase. Cranes are far more likely to be purchased by larger firms and/or firms working primarily on CII projects than by smaller firms and/or those working primarily on residential projects.

| CRANES (2019 by Subgroups) | | | | | | |
|---|---|---|---|---|---|---|
| | | **Number of Employees** | | | **Work Primarily In…** | |
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| | **%** | **%** | **%** | | **%** | **%** |
| Rental/Lease | 25 | 15 | **< 44** | | 10 | **< 36** |
| Purchase | 2.5 | 0.7 | **< 5.9** | | 0 | **< 4.3** |

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

## Trended Results

Rental/Lease: 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.

- However, compared with two years earlier, significantly higher percentages of *smaller* electrical contracting firms now rent/lease Cranes. Rental/leasing also increased among firms that work primarily on CII projects. In contrast, there is no statistically significant difference in rental/lease of Cranes among larger firms and/or among firms that work primarily on residential projects.

Purchase: There are no statistically significant changes in purchase compared with two years earlier by the subgroups shown below.

| **CRANES (2019 By Subgroups Trended)** | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Number of Employees** | | | | | | **Work Primarily In…** | | | | | |
| | **1-9** | | | **10+** | | | **Residential** | | | **CII** | | |
| | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** |
| | (150) | (162) | (278) | (85) | (71) | (98) | (84) | (81) | (146) | (116) | (107) | (172) |
| | % | % | % | % | % | % | % | % | % | % | % | % |
| Rental/Lease | **15** > | **6.7** > | 3.1 | 44 = | **42** > | 15 | 10 = | 4.9 = | 1.4 | **36** > | **28** > | 10 |
| Purchase | 0.7 = | 0.7 = | 1 | 5.9 = | 2.6 = | 6 | 0 | 0 | 0 | 4.3 = | 2.8 = | 3 |

**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 2019 NUMBER OF FIRMS RENTING/LEASING AND PURCHASING: CRANES**

| | Percent of Respondent Firms Buying or Renting | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Buying or Renting |
|---|---|---|---|
| **CRANES** | % | # | # |
| Rental/Lease | 25.0 | 75,381 | **18,845** |
| Purchase | 2.5 | 75,381 | **1,885** |

## Mobile Office Space (Trailers) Rental/Lease and Purchase Behavior

14% of electrical contractors obtained Mobile office space (trailers) in 2019 through *rental/lease* and 4.7% through *purchase*. The levels of rental/lease and purchase are each statistically unchanged compared to two years earlier.                .

| MOBILE OFFICE SPACE (2019 Trended) | | | |
|---|---|---|---|
| | **In 2019** | | **In 2017** |
| | **Total** | | **Total** |
| | (236) | | (234) |
| | **%** | | **%** |
| Rental/Lease | 14 | = | 12 |
| Purchase | 4.7 | = | 2.8 |

Mobile office space (trailers) is more likely to have been obtained in 2019 by larger firms and/or firms working primarily on CII projects than by smaller firms and/or firms working primarily on residential projects. This is the case for both rental/lease and purchase.

| MOBILE OFFICE SPACE (2019 by Subgroups) | | | | | |
|---|---|---|---|---|---|
| | | **Number of Employees** | | **Work Primarily In** | |
| | **Total** | **1-9** | **10+** | **Residential** | **CII** |
| | (236) | (150) | (85) | (84) | (116) |
| | **%** | **%** | **%** | **%** | **%** |
| Rental/Lease | 14 | 4 | **< 32** | 2.4 | **< 22** |
| Purchase | 4.7 | 1.3 | **< 10.6** | 1.2 | < **6.0** |

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

**Trended Results**

Rental/Lease: There are no significant differences by any of the subgroups shown below compared to two years earlier. This is consistent with the fact that there was no difference among the total sample compared with two years ago.

Purchase: There are no statistically significant changes in Mobile office space (trailers) purchase compared with two years earlier by any of the subgroups shown below. As above, this is consistent with the fact that there was no difference among the total sample compared with two years ago.

| MOBILE OFFICE SPACE (2019 By Subgroups Trended) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | **Number of Employees** | | | | **Work Primarily In…** | | | |
| | **1-9** | | **10+** | | **Residential** | | **CII** | |
| | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** |
| | (150) | (162) | (85) | (71) | (84) | (81) | (116) | (107) |
| | % | % | % | % | % | % | % | % |
| Rental/Lease | 4 = | 4.3 | 32 = | 31 | 2.4 = | 3.8 | 22 = | 17 |
| Purchase | 1.3 = | 0 | 10.6 = | 9 | 1.2 = | 0 | 6.0 = | 5.1 |

**Estimates and Projections: Mobile Office Space (trailers)**

ALL INDUSTRY ESTIMATE OF 2019 NUMBER OF FIRMS RENTING/LEASING AND PURCHASING: MOBILE OFFICE SPACE

| | Percent of Respondent Firms Renting or Buying | Number of EC Firms (Source: 2019 CBP) | Projected Number Firms Renting or Buying |
|---|---|---|---|
| **Mobile office space** | % | # | # |
| Rental/Lease | 14.0 | 75,381 | **10,553** |
| Purchase | 4.7 | 75,381 | **3,543** |

## Portable Generators Purchase and Rental/Lease Behavior

**In the next two sections -- Portable generators and Trailers (to haul equipment/materials) –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.**

19% of electrical contracting firms *purchased* Portable generators in 2019, statistically unchanged from the 2017 results. 13% obtained Portable generators through *rental/lease*, also statistically unchanged compared to two year earlier.

| PORTABLE GENERATORS (2019 Trended) | | | |
|---|---|---|---|
| | **In 2019** | | **In 2017** |
| | **Total** | | **Total** |
| | (236) | | (234) |
| | **%** | | **%** |
| Purchase | 19 | = | 16 |
| Rental/Lease | 13 | = | 11 |

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 purchase or rental/lease in this category.

| PORTABLE GENERATORS (2019 by Subgroups) | | | | | | |
|---|---|---|---|---|---|---|
| | | **Number of Employees** | | | **Work Primarily In** | |
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| | **%** | **%** | **%** | | **%** | **%** |
| Purchase | 19 | 11 | **< 33** | | 6 | **< 28** |
| Rental/Lease | 13 | 6 | **< 26** | | 4 | **< 21** |

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

**Trended Results**

Purchase: There are no differences among the total sample or by number of employees or by primary type of work in the purchase of Portable generators compared with two years earlier.

Rental/lease: The same holds true for rental/lease where there are no differences among the total sample or by number of employees or by the primary type of work performed compared with two years earlier.

| PORTABLE GENERATORS (2019 Trended) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | **Number of Employees** | | | | **Work Primarily In…** | | | |
| | **Total** | | **1-9** | | **10+** | | **Residential** | | **CII** | |
| | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** |
| | (236) | (234) | (150) | (162) | (85) | (71) | (84) | (81) | (116) | (107) |
| | % | % | % | % | % | % | % | % | **%** | **%** |
| Purchase | 19 = | 16 | 11 = | 10 | 33 = | 31 | 6 = | 9 | 28 = | 20 |
| Rental/Lease | 13 = | 11 | 6 = | 7 | 26 = | 20 | 3.6 = | 3.5 | 21 = | 16 |

**Estimates and Projections: Portable Generators**

**ALL INDUSTRY ESTIMATE OF 2019 NUMBER OF FIRMS RENTING/LEASING AND PURCHASING: PORTABLE GENERATORS**

| | Percent of Respondent Firms Buying or Renting | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Buying or Renting |
|---|---|---|---|
| **Portable generators** | % | # | # |
| Purchase | 19.1 | 75,381 | **14,398** |
| Rental/Lease | 13.1 | 75,381 | **9,875** |

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

This is the second of the two categories where rental/lease plays at least a non-negligible role, and where the level of purchase is actually comparable to the level of rental/lease.

17% of electrical contracting firms *purchased* Trailers (to haul equipment/materials) in 2019. This is statistically unchanged from the level observed in 2017.

9% *rented or leased* Trailers (to haul equipment/materials) in 2019, also statistically unchanged compared with 2017 results.

| TRAILERS (TO HAUL EQUIPMENT/MATERIALS) (2019) | | | |
|---|---|---|---|
| | **In 2019** | | **In 2017** |
| | **Total** | | **Total** |
| | (236) | | (234) |
| Purchase | 17% | = | 12% |
| | | | |
| Rental/Lease | 9% | = | 8% |

*Purchase* levels are higher among firms with 10+ employees and/or among firms working primarily on CII projects.

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

| TRAILERS (TO HAUL EQUIPMENT/MATERIALS) (2019) | | | | | | |
|---|---|---|---|---|---|---|
| | | **Number of Employees** | | | **Work Primarily In** | |
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| | **%** | **%** | **%** | | **%** | **%** |
| Purchase | 17 | 10 | **< 28** | | 6 | **< 22** |
| | | | | | | |
| Rental/Lease | 9 | 7 | 13 | | 5 | 11 |

**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: The same holds true for rental/lease where 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) (2019 Trended – By Subgroup) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | **Number of Employees** | | | | **Work Primarily In…** | | | |
| | **Total** | | **1-9** | | **10+** | | **Residential** | | **CII** | |
| | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** |
| | (236) | (234) | (150) | (162) | (85) | (71) | (84) | (81) | (116) | (107) |
| | % | % | % | % | % | % | % | % | % | % |
| Purchase | 17 = | 12 | 10 = | 7 | 28 = | 24 | 6 = | 4 | 22 = | 20 |
| Rental/Lease | 9 = | 8 | 7 = | 6 | 13 = | 12 | 4.8 = | 4.6 | 11 = | 14 |

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

**ALL INDUSTRY ESTIMATE OF 2019 NUMBER OF FIRMS RENTING/LEASING AND PURCHASING: TRAILERS (TO HAUL EQUIPMENT/MATERIALS)**

| | Percent of Respondent Firms Buying or Renting | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Buying or Renting |
|---|---|---|---|
| **Trailers (to haul equipment/materials)** | % | # | # |
| Purchase | 16.5 | 75,381 | **12,438** |
| Rental/Lease | 8.9 | 75,381 | **6,709** |

## 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.**

43% of electrical contracting firms reported a 2019 *purchase* of Personal protective equipment, including apparel and accessories, statistically unchanged compared with 2017.

Only 3.4% of electrical contracting firms *rented/leased* in this category; also statistically unchanged from the levels observed in 2017.

| PERSONAL PROTECTIVE EQUIPMENT/APPAREL and ACCESSORIES | | | | | | | |
|---|---|---|---|---|---|---|---|
| | **2019** | | **In 2017** | | **In 2015** | | **In 2013** |
| | **Total** | | **Total** | | **Total** | | **Total** |
| | (236) | | (234) | | (376) | | (374) |
| Purchase | 43% | = | **42%** | > | 31% | < | **44%** |
| Rental/Lease | 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, although at a low level among the total sample, is nevertheless significantly higher among firms with 10+ employees and/or those that work primarily on CII projects.

| PERSONAL PROTECTIVE EQUIPMENT/ APPAREL and ACCESSORIES (2019) | | | | | | |
|---|---|---|---|---|---|---|
| | | **Number of Employees** | | | **Work Primarily In** | |
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| | % | % | % | | % | % |
| Purchase | 43 | 34 | **< 59** | | 27 | **< 53** |
| Rental/Lease | 3.4 | 1.3 | **< 7** | | 0 | **< 6** |

**Trended Results**

Purchase: There are no differences among the total sample, as shown on the previous page or, as shown below, by number of employees or by primary type of work in the purchase of Personal protective equipment, including apparel and accessories, compared with two years earlier.

Rental/lease: The same holds true for rental/lease where there are no 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, compared with two years earlier.

| PERSONAL PROTECTIVE EQUIPMENT/ APPAREL and ACCESSORIES (2019 Trended) | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Number of Employees | | | | | | Work Primarily In. | | | | | |
| | 1-9 | | | 10+ | | | Residential | | | CII | | |
| | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** |
| | (150) | (162) | (278) | (85) | (71) | (98) | (84) | (81) | (146) | (116) | (107) | (172) |
| Purchase | 34% = | 31% = | 27% | 59% = | **68% >** | 41% | 27 = | 27 = | 26% | 53 = | **54% >** | 35% |
| Rental/Lease | 1.3% = | 0.7% | NA | 7% = | 5% | NA | 0 = | 1.4% | NA | 6% = | 3.4% | NA |

**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 2019 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: 2018 CBP) | Projected Number Firms Buying or Renting |
|---|---|---|---|
| **Personal protective equipment, including apparel and accessories** | % | # | # |
| Purchase | 42.8 | 75,381 | **32,263** |
| Rental/Lease | 3.4 | 75,381 | **2,563** |

## Job-site Safety Equipment Purchase and Rental/Lease Behavior

34% of electrical contracting firms reported a 2019 purchase of Job-site safety equipment. 7% 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 (2019 Trended) | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | **In 2019** | | **In 2017** | | **In 2015** | | **In 2013** | | **In 2011** |
| | **Total** | | **Total** | | **Total** | | **Total** | | **Total** |
| | (236) | | (234) | | (376) | | (374) | | (234) |
| Purchase | 34% | = | 28% | = | 26% | < | **32%** | = | 29% |
| | | | | | | | | | |
| Rental/Lease | 7% | = | **6%** | > | 1.4 | | | | |

In 2019, *purchase* levels 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 for Job-site safety equipment.

In 2019, larger companies were more likely to *rent/lease* Job-site safety equipment, however there were no differences by primary type of work.

| JOB-SITE SAFETY EQUIPMENT (2019 by Subgroups) | | | | | |
|---|---|---|---|---|---|
| | | **Number of Employees** | | **Work Primarily In…** | |
| | **Total** | **1-9** | **10+** | **Residential** | **CII** |
| | (236) | (150) | (85) | (84) | (116) |
| | **%** | **%** | **%** | **%** | **%** |
| Purchase | 34 | 23 | **< 53** | 17 | **< 44** |
| | | | | | |
| Rental/Lease | 7 | 4.7 | **< 12** | 6 | 9 |

**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. Nevertheless, purchase levels posted a significant increase among firms with 1-9 employees but were unchanged among firms with 10+ employees and/or those that work primarily on CII projects or residential projects.

- In contrast, note that two years ago purchase levels rose among larger firms and/or firms that work primarily on CII projects even though there was no statistically significant increase in purchase among the total sample between 2015 and 2017. In contrast, the exact opposite occurred two years ago. Specifically, purchase levels rose significantly among larger firms and/or those that work primarily on CII projects.

As shown on the preceding page, there was no statistically significant change in *rental/lease* behavior among the total sample. As shown below, nor are there changes in rental/lease by number of employees or by primary type of work performed compared with two years earlier. Note that from 2015 and 2017, where rental/lease behavior rose among the total sample, it also rose among firms with 10+ employees and/or among firms that worked primarily on residential projects as well as among firms working on CII projects.

| JOB-SITE SAFETY EQUIPMENT (2019 Trended by Subgroup) | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Number of Employees** | | | | | | **Work Primarily In** | | | | | |
| | **1-9** | | | **10+** | | | **Residential** | | | **CII** | | |
| | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** | **2019** | **2017** | **2015** |
| | (150) | (162) | (278) | (85) | (71) | (98) | (84) | (81) | (146) | (116) | (107) | (172) |
| Purchase | **23%** > | 14% = | 18% | 53% = | **60%** > | 46% | 17%= | 9% = | 16% | 44% = | **45%** > | 35% |
| Rental/Lease | 4.7% = | 3% | 1.2% | 12 % = | **14%** > | 2.1% | 6% = | **4.6%**> | .6% | 9% = | **7.3%** > | 2.6% |

**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 2019 NUMBER OF FIRMS RENTING/LEASING AND PURCHASING: JOB-SITE SAFETY EQUIPMENT**

| | Percent of Respondent Firms Buying or Renting | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Buying or Renting |
|---|---|---|---|
| **Job-site safety equipment** | % | # | # |
| Purchase | 33.9 | 75,381 | **25,554** |
| Rental/Lease | 7.2 | 75,381 | **5,427** |

## Temporary Job-site Lighting Purchase and Rental/Lease Behavior

26% of electrical contracting firms purchased Temporary job-site lighting in 2019, which is statistically unchanged from the 23% which was measured two years earlier. 4.7% rented or leased in this category in 2019, which is also statistically unchanged from two years earlier.

| TEMPORARY JOB-SITE LIGHTING | | | |
|---|---|---|---|
| | **In 2019** | | **In 2017** |
| | **Total** | | **Total** |
| | (236) | | (234) |
| | **%** | | **%** |
| Purchase | 26 | = | 23 |
| | | | |
| Rental/Lease | 4.7 | = | 4.2 |

Both *Purchase* levels and *rental/lease* levels are significantly higher among larger electrical contracting firms and/or among those that work primarily on CII projects.

| TEMPORARY JOB-SITE LIGHTING (2019) | | | | | | |
|---|---|---|---|---|---|---|
| | | **Number of Employees** | | | **Work Primarily In** | |
| | **Total** | **1-9** | **10+** | | **Residential** | **CII** |
| | (236) | (150) | (85) | | (84) | (116) |
| | **%** | **%** | **%** | | **%** | **%** |
| Purchase | 26 | 14 | < **47** | | 12 | < **38** |
| | | | | | | |
| Rental/Lease | 4.7 | 1.3 | < **11** | | 0 | < **7** |

**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 (shown on the preceding page) and as shown below, by number of employees and by primary type of work performed.

Although *rental/leasing* is also statistically unchanged among the total sample, by number of employees and among firms working primarily on CII projects, it posted a significant decline among firms working primarily on residential projects compared with two years earlier.

| TEMPORARY JOB-SITEE LIGHTING (2019 Trended – By Subgroup) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | Number of Employees | | | | Work Primarily In… | | | |
| | Total | | 1-9 | | 10+ | | Residential | | CII | |
| | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** | **2019** | **2017** |
| | (236) | (234) | (150) | (162) | (85) | (71) | (84) | (81) | (116) | (107) |
| | % | % | % | % | % | % | % | % | % | % |
| Purchase | 26 = | 23 | 14 = | 14 | 47 = | 46 | 12 = | 9 | 38 = | 33 |
| Rental/Lease | 5 = | 4 | 1.3 = | 3 | 11 = | 7 | **0 <** | 4.9 | 7 = | 2.8 |

**ALL INDUSTRY ESTIMATE OF 2019 NUMBER OF FIRMS RENTING AND PURCHASING: TEMPORARY JOB-SITE LIGHTING**

| | Percent of Respondent Firms Buying or Renting | Number of EC Firms (Source: 2018 CBP) | Projected Number Firms Buying or Renting |
|---|---|---|---|
| **Temporary job-site lighting** | % | # | # |
| Purchase | 25.8 | 75,381 | **19,448** |
| Rental/Lease | 4.7 | 75,381 | **3,543** |