

2026 Profile of the Electrical Contractor

S C O M M E R C I A L F T W A
C P R E G A T L O V W O L J H
U E T K I L T A R I F F S A
K C M E M A B I D D I N G
A P I Q N M N E D L Z E N
N U F V E E O E K O F O
W K T Y L S U I P Y F P O
R E S I D E N T I A L Z
J C F G S E E U F J N
R T O A A T L V T J O
S R H G D T E E I I N
D P V Z E O E C R T S
Q B O T A S D V N M F
M O F R R U N X G S X
D F A O I C I Q Q Q
H T I B E C Y V E W
R N A C T A D Z R
P I L O T C L I O
N L N B Y D S T
G O O C G O Y C
U C M Z N S N A A
H Y H C E A R H
V T Y I A P T Q
Z M N D S H M E
O O U R D A L
C C O T V I A
K R B C N I
J H Z T R
F X D E T Y
T K N S C
G K A U H
F N D M
C N P L
E I B Q
K D A
P G
L E
W
P
Q

**Topline Report by
Renaissance Research &
Consulting, New York**

August 2026

2026 Profile of the Electrical Contractor

Prepared by Renaissance Research & Consulting, Inc.

7-24-26

BACKGROUND	1
Methodology	1
Statistics	1
KEY FINDINGS.....	2
Training.....	7
Administration	8
NEW 2026 TOPICS.....	8
Artificial Intelligence	8
Tariffs.....	9
Attribute Ratings/Mean Satisfaction	9
Confidence in Near Term Growth of the Economy	9
DETAILED FINDINGS	10
Revenue and Number of Employees.....	11
Change in Company Size.....	13
Other Firm Characteristics Including NECA Membership and Firm Administration	16
Firm Uses IBEW Labor	17
On-site vs. Office Workers	18
Special Designations	19
Requirements to Bid a Project—Trended	21
-- Requirements to Bid a Project.....	22
Employ Full- or Part-Time Safety Director	22
Separate Divisions	23
Employee Relations	24
Participation in Government Work	25
Number of Years Firm Has Been Business.....	26
“WHO” WORKS FOR CONTRACTING FIRMS?	28
Age of Respondents	28
Respondent Education.....	31
Level of Responsibility	33
Gender.....	34
Where Purchases are Made	34
Sources Used to Keep Abreast of Electrical Contractor Industry News, Problem-Solving Ideas and New Product Technology	35
▲ TYPES OF WORK PERFORMED	38

CII Findings—Statistically Significant Differences Only Q6, Table 36 (Base = 926).....	49
Low-Voltage: Firms’ Active Engagement in Systems Integration or Data Centers	51
Roles Played by Firm in Integrated Systems	52
▲ “WHERE” DO CONTRACTORS PERFORM THE WORK?.....	53
Number of States.....	53
Types of Work: By Sector (New Construction vs. Modernization vs. Maintenance and Repair)	55
Work in Various Building Categories (Residential vs. CII vs. Nonbuilding).....	59
▲ ”HOW” DO CONTRACTORS PERFORM THEIR WORK?	63
BIM (Building Information Modeling).....	67
Completeness and Correctness of Plans and Specifications	69
Role of Engineers within Electrical Contracting Firms	72
Project Collaboration/Level of Influence.....	74
Brand Specification Options	75
Main Reasons for Original Brand Selection and Substitution	77
▲ TRAINING AND TOPICS OF INTEREST	82
Will Take/Have Taken Training and What Was Studied.....	82
NEW 2026 TOPICS.....	87
▲ A.I. (Artificial Intelligence)	87
▲ Tariffs.....	91
▲ Mean Attribute Satisfaction Ratings	92
▲ Confidence in the Growth of the Economy.....	93

BACKGROUND

For over fifty years, ELECTRICAL CONTRACTOR magazine has sponsored its exclusive “Profile of the Electrical Contractor.” This survey is conducted biannually among its subscribers and aims to provide the most complete “picture” of the contracting industry available from the electrical contractor’s point of view. The survey provides electrical contractors with an indication of where their business fits into the overall industry, while at the same time providing information that is used to guide and refine the magazine’s editorial content.

Methodology

The survey was conducted exclusively online among subscribers to ELECTRICAL CONTRACTOR magazine and its newsletters. In addition, 144 members of the ELECTRICAL CONTRACTOR Subscriber Research Panel also participated in the survey. The field period for the survey ran from Jan. 28 through March 31, 2026. A total of 926 participants completed the survey in that time.

As in 2024, the 2026 survey was only offered on the internet because of the dwindling participation in previous years through the mailed printed surveys. The online option was introduced in 2004.

We also attracted respondents through the weekly ELECTRICAL CONTRACTOR e-newsletter and with advertisements in the February and March print magazines that included a link to the survey using their subscriber number, which was then authenticated online.

As in 2020, 2022 and 2024, the proportion of the total respondents attributable to the print list was so low that weighting the data would distort the total statistics.

Each respondent who received the online survey was sent up to seven follow-up emails. For each completed survey, ELECTRICAL CONTRACTOR contributed \$5 to charity. In addition, the magazine offered a sweepstakes drawing for a chance to win one of ten \$150 Amazon gift cards. Panel members were also entitled to be entered into two monthly Panel sweepstakes for completing the Profile survey.

Since 2004, we have produced different versions of the survey. For the 2008 through 2016 Profile studies, there were four versions that had 30 common questions, differing on fewer than 10 questions. Since 2018, there have been seven versions.

This research was conducted by New York-based Renaissance Research & Consulting Inc. (www.renaiss.com), an independent market research firm that specializes in the construction industry among others. The survey was conducted using the Qualtrics survey platform.

We used ChatGPT in the development of the report. However, its findings were checked and modified by human analysts and editors.

Statistics

The margin of error on the total sample of 926 is $\pm 2.7\%$ for percentages around 50% (i.e., we are confident that a reported 50% will fall between 53% on the plus side and 47% on the minus side 90% of the time). Please note that different rules apply to testing of averages, which were also tested at the 90% level of confidence and are noted in the report.

A significant difference in the total sample between 2026 with a sample size of 926 and 2024 with a sample size of 828 is at least 4.4% at the 90% confidence level. Bold text and an arrow in the charts indicate significant difference and the direction of the difference. A (+) or (–) next to the title indicates a significant difference compared to its pair.

KEY FINDINGS

Unlike two years ago, this is a story of contraction for the industry. Company size and revenue have both declined.

- Among the total sample, significantly more firms have 1-9 employees (58%) and significantly fewer have 10+ employees (42%). Two years ago, the split was approximately 50/50.
- A similar pattern emerges with regard to revenue. Overall, firm revenue declined from 2024 to 2026: In the total market, there is a **significant shift toward lower sales**. The share of firms with **less than \$1M increased from 42% to 49%**, while those at **\$1M+ decreased from 49% to 43%**. The declines in **median (\$1.4M → \$0.9M)** and the statistically significant drop in the **mean (\$7.0M → \$5.5M)** reinforce this overall softening.
- Interestingly, no particular company size posted a significant decrease. Rather the decline is the result of directional declines across ECs in firms of different sizes.
- A similar pattern emerges with regard to revenue. With the exception of firms with 5-9 employees, there are no statistically significant shifts in revenue by company size.
 - The only change takes place among firms with 5-9 employees: The percentage of firms with revenue of under \$1 million dropped significantly from 54% to 43%, while the percentage of firms with 5-9 employees increased from 39% two years ago to 53% in the current wave. There are no other statistically significant changes among the 1-9 or 10+ employee firms.
- As was the case two years ago, most firms that participated in the 2026 Profile Study reported that their firm stayed the same in terms of number of employees (63%, a statistically significant increase over the 56% that reported two years ago). 13% reported a decline.
- Far fewer small firms added employees (11% among firms with 1-9 employees) compared with the 44% of firms with 10+ employees that added employees. The difference is that small firms were more likely to have stayed the same (78%) than to have increased (11%) or to have decreased (11%).
 - Among smaller firms, there are **no statistically significant year-over-year changes**. Growth (11%), stability (78%) and decline (11%) are all in line with prior readings.
 - What is interesting is that electrical contractors appear to be perceiving employee size stability in the face of more smaller firms. Perhaps what they are seeing is the creation of new/small firms, rather than smaller firms as the result of firing staff.
- Regardless of company size (number of employees), the survey respondents continue to be predominantly middle aged or older, rather than young. However, the age breakdown is bifurcating for those older than 54.

- Across the total sample, only 4% are aged 18-34, 27% are between the ages of 35-54, 30% are aged 55-64 (a significant *decrease* from 35% to 30%) while 40% are aged 65+ (a significant increase from 36% two years ago).
- Compared with two years ago, the percentage of respondents between 18 and 54 showed no significant changes. Those aged 55-64 *decreased* while those aged 65+ *increased*, driven by a significant increase among those 75+ (posting a small, but significant increase from 5.9% to 8.4%, not shown). Nor did the *average* age increase from two years ago.¹ (The average age is 59.0) This was also the case in 2024; perhaps the aging of the workforce is leveling off.
- Nevertheless, electrical contractors in larger firms of 10+ employees continue to be substantially and significantly younger on average (56.5 years old) compared with electrical contractors in firms with 1–9 employees (60.8 years old).
- 60% of the electrical contractors in this survey have some college education, statistically unchanged from two years ago, when it was also 60%.
 - Respondents in firms with 10+ employees are significantly more likely to hold a bachelor's degree or higher (30% in firms with 10+ employees vs. 23% in firms with 1–9 employees).
- 5% of the electrical contractors who participated in this survey are women, statistically unchanged from 2024.
- On average, electrical contractors continue to get more of their revenue from CII projects (48.5%) than from residential work (39.1%). Nonbuilding (Transportation/Lighting and Utility) accounts for 12.5%. The proportion from CII projects is significantly down compared with two years ago, while the proportion from residential and nonbuilding are both up. (Note that some of the nonbuilding increase may be due to the addition of power gensets to the category in 2026.)
- The decline in CII revenue is due to a decline in specifically the commercial portion of CII and not due to decreases in industrial or institutional project revenue.
- As of 2026, the average percentage of contractor revenue from single-family homes at 33.4% outpaces that from commercial projects at 24.6%. Two years ago, the percentages were at parity, but single-family homes posted a significant increase while the average percent of revenue from CII projects declined significantly.
- Compared to two years ago, total CII, commercial and multifamily high rise (6+ stories) posted a statistically significant decline. While total residential, single-family and total nonbuilding posted a statistically significant increase. (Table 23).
- As of 2026, CII continues to account for more overall average revenue than do residential or nonbuilding projects. As shown in the report, note the relative importance of residential projects to smaller firms and the increasing importance of CII and nonbuilding projects as firm size increases.

¹ NECA vs. non-NECA The average age is statistically younger among NECA firms (55.7) than non-NECA firms (59.9). Among both NECA and non-NECA firms, the average age held statistically unchanged with two years earlier.

- As was also the case in the recent past, within the broad CII category, a greater percentage of electrical contractors' revenue is from commercial construction (24.6%) rather than from industrial (14.2%) or institutional projects (9.7%).
- Average revenue from new construction is down compared with two years ago, essentially reversing the increases posted two years ago, while revenue from maintenance/service/repair increased due to increased revenue from repairs and maintenance under service contracts
- Concurrent with the decline in new construction, the types of work performed in the CII sector and in CII and Residential construction on a combined basis is down in every broad product category.

Here the percentages reporting about the types of work performed in the previous year (regardless of whether residential or CII:

- Over nine in ten contractors (95%) work on low-voltage projects, which spans multiple categories.
- A great majority (93%) work in traditional power and lighting. A similar amount worked on power (90%) and on lighting (89%).
- Seven in ten (73%) worked on at least one aspect of automation/control systems. Four in ten (42%) worked on residential automation/control* while just over one half (56%) worked on CII automation/control*.
- Almost three-quarters of contractors (72%) worked on “other” types of work (which includes any electrical maintenance/service/repair, HVAC mechanical, pre-assembly/prefabrication of electrical components and/or water utilities or wastewater treatment plants).
- About seven in ten (71%) worked on power quality, while about two-thirds (66%) worked on sustainability.
- One half of respondents (53%) work on communications systems/connectivity.
- Just over one in ten (15%) reported they worked on high-voltage projects.
 - In almost every category, the percentages were lower in 2026 than in 2024.

Here is a list of the *individual* project types that did not change and that had participation of 20% or higher: There were no statistically significant increases when projects are viewed on a combined basis.

- LED lighting (including lamps, fixtures and controls): 84%
 - Power: 83%
 - Lighting fixtures: 78%
 - EV charging: 47%
 - Structured wiring/cabling: 44%
 - Troubleshooting/maintenance of low-voltage systems: 41%
 - HVAC controls: 34%
 - Fiber optics (communications and security): 25%
 - Home automation: 24%
 - Programming and commissioning: 24%
 - Solar/photovoltaics: 22%
 - HVAC mechanical (21%)
- The results were more positive when *residential* construction is viewed on its own. Specifically, most of the categories did not change and three increased: smart or net metering, HVAC mechanical and HVAC controls rose. None declined.

The previous section deals with whether electrical contractors report doing “any” of a particular type of work. This next section deals with average *revenue*. Electrical contractors were given a list of up to 15 project types and were asked how much of their revenue came from each of these sources. This was the question that showed the dramatic shift away from electric power transmission and distribution to higher-value categories such as lighting in 2016.

- In 2026, the top three categories based on average revenue are lighting ballasts, controls, fixtures, lamps (24.0%); electric power transmission and distribution (22.6%); and industrial systems (9.6%).
- In the most recent wave, only backup systems changed from two years earlier, posting a significant decline. This is possibly due to the 2026 survey addition of power gen sets, which may have seen as fulfilling a similar function.
- Among the total sample, use of BIM (Building Information Modeling) has statistically declined among the total in terms of “any” use and average use since 2024. Both declines were small, but this is the first time that “any” BIM use has declined since 2018. This is the first year that BIM has declined on an average basis as we’ve noted, use of BIM increases with company size, rising to about 80% “any” use and more than 30% on an average basis among very large firms (both “any” and average BIM usage is statistically unchanged compared with two years earlier).
- Given this list of high-tech project types and approaches (such as BIM), it should not be surprising that 59% of electrical contracting firms continue to have a professional relationship with an engineer, statistically unchanged from two years ago. Although these relationships are more prevalent among larger firms—80% among firms with 10+ employees vs. 46% of firms with 1-9 employees—even 40% of firms with 1-4 employees report working with engineers.

- Continuing a story we reported in 2020, in 2026 the way that electrical contractors bid jobs is remarkably consistent: time and materials, maintenance/service/repair and traditional bid-build basis are mentioned most often on an “any” mention basis.
- In terms of average revenue (which adds to 100%), the top three methods of bidding are time and materials (27%), traditional bid-build (27%) and design-build or design-assist (22%). Maintenance/service/repair (on a combined basis) accounts for an average of about 20%. Only about 2% of projects were bid on a collaborative basis or on some other basis in 2025. Construction management, which was added in 2026, clocked in at 2%.

Electrical contractors continue to have wide discretion to influence brand choice.

- As has been the case in recent Profile Studies, more than three-quarters of electrical contractors report having a “high” or “medium” ability to influence the overall electrical design or specifications with building owners and/or design team members.
- Compared with two years earlier, fewer contractors who work in firms with 10+ employees report they have a “high” level of influence (25% vs. 44%).
- About 8 in 10 electrical contracting firms say that they receive incomplete plans and specs and/or incorrect plans and specs, both of which afford the electrical contractor the opportunity to influence the project and its specifications.
 - In fact, from a separate set of questions, respondents were asked how much discretion they have in original brand selection or in making a brand substitution. Overall, contractors are able to make brand selections about 67% of the time—73% in the case of firms with 1–9 employees and 60% in the case of firms with 10+ employees. These percentages are consistent with what had been reported two years ago.
- Availability and price continue to top the list of reasons for original brand selection and/or substitution. In fact, availability scores even higher in the case of brand substitution than in the case of original brand selection (85% vs. 73%). Price is essentially the same at 58% and 55% for original brand selection and for substitution. Compatibility with existing systems has been consistently in a distant third place (42% in the case of original brand selection and 44% in the case of brand substitution).

Electrical contractors’ influence extends to where they made purchases and there has been a marked return to historical measures in 2026 from 2024 measures.

- Specifically, the average percentage of electrical contractor purchases that are made at electrical distributors posted a large and significant increase to the historical level of 63% after dropping to 48% two years ago. The percentage reporting purchases at retailers (including big box stores and local hardware stores), rose to 15% from 10%, mostly due to an increase among small firms.
- In contrast, direct from manufacturer dropped precipitously from 21% to 5%, among both small and large firms and its drop may suggest that supply chains are less of a problem for historical vendors.

Electrical contractors were asked which sources they use to keep abreast of electrical contractor industry news, problem-solving ideas and new technology. The list included media and nonmedia sources such as vendors (distributors and retailers), seminars, webinars and word-of-mouth.

- Trade magazines continue to be chosen the most often, by far (87% of the total sample). In contrast, social media (33%) and podcasts (13%) scored substantially lower on this measure.
- As was the case two years ago, trade magazine results are equally strong among both small and large firms. As was also the case two years ago, all of the other sources scored lower than trade magazines with the 35-54 age group.
 - Word-of-mouth, webinars, social media and podcasts are particularly favored by electrical contractors aged 35-54 compared to those aged 55-64, and particularly those aged 65+. Note that all of those sources trail trade magazines by wide margins, even among electrical contractors aged 35-54.
 - Compared with those in firms with 1-9 employees, those in larger firms are more likely to use trade shows, webinars/seminars, podcasts and 4 or more sources. Those in smaller firms are more likely than their larger counterparts to cite retailers and to use fewer sources.

Compared to two years ago, a number of sources posted significant changes among the total sample including the following:

- Increased: Social media (such as Facebook, Instagram, Twitter (X), YouTube) and retailers (big box or local hardware).

Training

The courses receiving the most mentions include NEC usage and /or changes (62%), safety (electrical/personal/on-site/job site) (57%) and grounding/bonding (43%). NEC usage and/or changes is statistically up from 2024 (50%). A.I. was included for the first time in 2026 in a long list and may have been difficult to find. However, only 14% expressed interest in it.

Interestingly, three nontechnical courses are down from 2024: personnel/leadership (52% to 36%), project management (32% to 22%) and developing new business opportunities (22% to 13%).

Eighty percent of electrical contractors have taken or will take 3 or more courses.

For both training and certification, sources appear to be tiered, with more electrical contractors turning to an organization/association and a manufacturer than to vocational/other school.

- There was a statistical increase from 2024 to 2026 for both training (44% to 58%) and certification (31% to 43%) for manufacturers. Organization/association saw a statistical decrease in certification (58% to 45%).

A significantly higher percentage of larger companies (10+ employees) indicated they will be getting training at an organization/association or vocational/other school than smaller companies (1-9 employees). Smaller companies were more likely to mention one source for training while larger companies mentioned three or more sources.

Larger firms are more likely to use an organization/association or vocational/other school as a source for their certification than small firms.

Administration

Starting in the 2020 Profile Study, we asked a number of questions about administration. In 2024, we learned that:

- There continues to be a very consistent split of approximately 80/20 between the average percentage of the workforce that is considered on-site electrical workers vs. the average for being considered primarily business/office workers.
- Safety continues to be a key factor in the bid process: Across the total sample, 40% say that they are required to have a prequalified standards and safety program in order to bid on a project. (71% of firms with 10+ employees vs. 21% of firms with 1–9 employees). The results among the total sample is statistically lower than 2024 (40% vs. 48%) while firms with 1-9 employees and 10+ employees are statistically unchanged. (Q.10D Table 60)
 - Nevertheless, 56% (down from 65% in 2024) say that they already have a certified safety program or that they plan to institute one in 2026. Having a certified safety plan increases steadily with company size (from 36% among firms with 1–4 employees and up to 93% among firms with 100+ employees). (Q.10F Table 61)
- More than one-half of firms (58%) have worked on government projects since 2024; 59% said that they expect to work on government projects in 2026.
 - Regardless of the time frame of the work, more of the participation is closer to home, that is, work for local entities > state > federal projects.
 - Once again, larger firms are far more likely to perform government work (79% among firms with 10+ employees vs. 43% among firms with 1–9 employees).

Note that the difference between smaller and larger companies is more pronounced in the case of federal work. Specifically, larger firms are about twice as likely to have or plan to do local work or state work but are about three to four times more likely to have or plan to do federal work than smaller firms. (V5 Q.19a/19b Tables 145,146)

NEW 2026 TOPICS

Artificial Intelligence

Artificial intelligence (A.I.) was added to the 2026 Profile Study to begin to gauge its impact on electrical contracting. The questions were asked in various sections throughout the survey rather than in a single, continuous section and different questions were answered by different groups of respondents. Note that, as shown below, the percentage that say that they use A.I. varies within the survey.

The results indicate that A.I. use and knowledge is not widespread among electrical contractors, nor do most of the survey participants plan to adopt it. We see evidence that larger firms engage more with A.I. than do smaller firms.

Among those approximately 10% of firms in this survey that do make use of A.I., estimating (77%), automating routine administrative tasks (56%) and in design (50%) were most often mentioned.

- 29% said that they use A.I. in the office rather than in the field (14%).

Because data centers are tied to A.I., we included data centers in this section of the report.

- 17% of electrical contractors reported their company performed data center work last year, which is down statistically significantly from 23% in 2024. Fewer small companies in 2026 reported performing data center work while the number of large companies stayed the same. Although outside the scope of this report, we wonder if the decline is due to widespread and vocal opposition to the construction of new data centers. Larger firms are more likely than smaller firms to work on data centers.

Tariffs

High percentages—50% to 80%—of category users experienced higher prices as a result of tariffs. A much smaller percent of category users report experiencing less availability.

Attribute Ratings/Mean Satisfaction

- Attribute ratings for the three attributes that could be tracked are well off their pre-COVID levels—revenue (minus 15.6 points), profitability (minus 17 points) and supply availability (minus 24.2 points).
- Two attributes cannot be tracked: Cost of materials has a mean rating of 47.9 and ability to meet staffing needs has a mean rating of 53.7.

Confidence in Near Term Growth of the Economy

We asked one subsection (version) of the survey takers to tell us to how confident they are in the growth of the economy over the next few years. Although not back to pre-COVID levels, confidence levels are not as low as during the pandemic.

DETAILED FINDINGS

In 2025, companies contracted in terms of number of employees and revenue.

- Among the total sample, significantly more firms have 1-9 employees (58%) and significantly fewer have 10+ employees (42%). Two years ago, the split was approximately 50/50.

Table 4	Number of Employees Company Reported in Previous Year_Q2A					
	Total		1-9		10+	
	2026	2024	2026	2024	2026	2024
Total Answering	(926)	(825)	(538)	(418)	(388)	(407)
	%	%	%	%	%	%
Any	100	100	100	100	100	100
1-9	58>	<i>51</i>	100	100	0	0
1-4	45>	<i>37</i>	77	73	0	0
1,2	32>	<i>27</i>	55	53	0	0
3,4	13	10	22	20	0	0
5-9	14	14	23	27	0	0
10+	<i>42</i>	<49	0	0	100	100
10-19	11	12	0	0	27	25
20-99	<i>16</i>	<20	0	0	37	41
100+	15	17	0	0	35	35

Bold percentages are significantly higher than *italicized* percentages in the direction of the arrow

Revenue and Number of Employees

A similar pattern emerges with regard to revenue. Overall, firm revenue declined from 2024 to 2026:

In the total market, there is a **significant shift toward lower sales**. The share of firms with **less than \$1M increased from 42% to 49%**, while those at **\$1M+ decreased from 49% to 43%**, The declines in **median (\$1.4M → \$0.9M)** and the statistically significant drop in the **mean (\$7.0M → \$5.5M)** reinforce this overall softening.

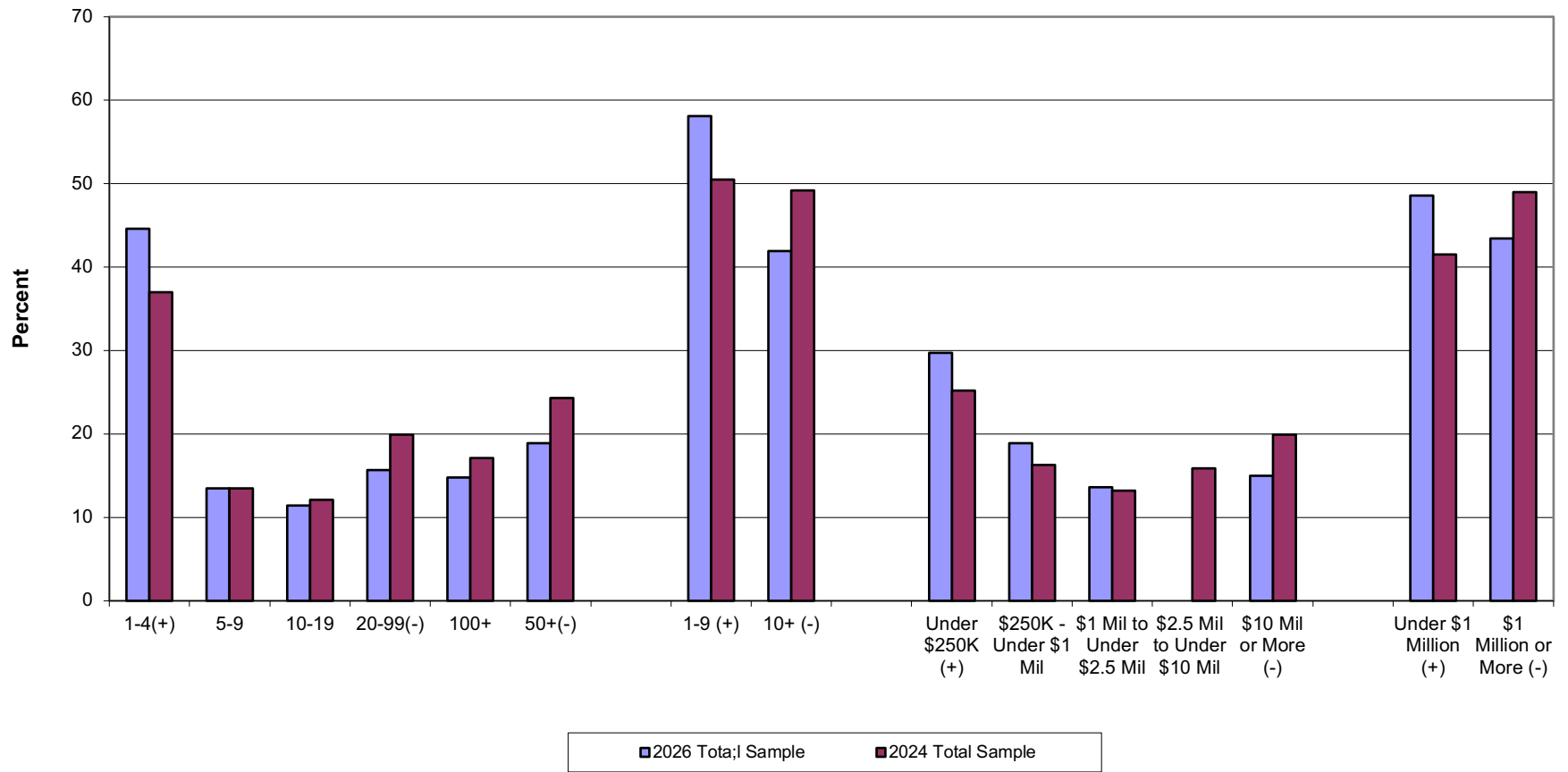
The only change takes place among 5-9 employee firms: the percentage of firms with revenue of under \$1 million dropped significantly from 54% to 43% while the percentage of firms with 5-9 employees increased from 39% two years ago to 53% in the current wave. There are no other statistically significant changes among the 1-9 or 10+ employee firms.

Revenue by Number of Employees 2026 Profile Study vs. 2024 Profile Study (Reporting on Previous Year) Q3																
	Total		1-4		5-9		1-9		10+		10-19		20-99		100+	
	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024
	(926)	(828)	(413)	(306)	(125)	(112)	(538)	(418)	(388)	(407)	(106)	(100)	(145)	(165)	(137)	(142)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Less than \$1 Million	49>	42	90	86	43	<54	79	78	6	5	16	14	4	3	2	1
Less than \$250K	30>	25	63	64	7	9	50	49	1	1	2	3	1	1	1	0
\$ 1 Million or More	43	<49	3	2	53>	39	14	12	83	87	79	79	91	94	80	85
Between \$2.5 Million and <\$10 Million	15	16	1	0	13	3	4	1	30	31	30	33	53	53	7	6
\$ 10 Million or More	28	33	2	2	40	36	10	11	53	56	49	46	38	41	73	79
Between \$10 Million and <\$25 Million	6	<9	0	0	0	1	0	0	14	17	3	0	24	30	13	14
\$25 Million +	9	<12	0	0	0	0	0	0	21	23	0	0	3	3	57	63
Don't Know/No Answer	8	9	8	12	4	7	7	11	10	8	5	7	5	3	19	14
Median (Millions)	0.9	1.4	0.2	0.2	1.2	0.9	0.2	0.2	7.7	8.6	2.0	2.1	7.2	7.8	32.2	32.9
Mean (Millions)	5.5	<7.0	0.4	0.4	1.8>	1.3	0.7	0.6	12.4	13.2	3.4	3.2	9.2	9.9	24.5	25.2
SD (Millions)	9.17	10.8	0.59	0.45	1.83	1.91	1.19	1.16	11.07	11.03	3.34	2.33	6.88	6.79	9.24	8.55
Prefer Not to Say	8	9.4	7.5	<11.8	4	7.1	6.7	<10.5	9.8	7.9	4.7	7	4.8	3.0	19.0	14.1

< and > indicates a significant difference at the 90% level of confidence

Table 6

**Company Size Trended 2026 Profile vs. 20242 Profile
(Reporting on Previous Year) _Q2A and Q3**



(-) and (+) indicate statistically significant differences from the 2024 Profile Study

Tables 4 and 6

Change in Company Size

What's notable is that firm sizes are reported to have stayed relatively constant in the face of declining revenues: Note that there is a discrepancy between ECs reporting only limited changes in the size of their companies over the past 18 months and the decrease to smaller firms compared to two years ago.

Among the total sample:

Over the past 18 months, a majority of firms stayed the same in terms of number of employees (63%), rather than to have increased (24%) or to have decreased (13%). This was also the case two years ago when 56% of firms stayed the same.

- However, firms are statistically even more likely to have stayed the same in the 2026 study compared with the 2024 study. In contrast, the percentages of firms that either increased or decreased is statistically unchanged compared with two years earlier.
 - Note that in 2026, participating firms were about twice as likely to have increased (24%) than to have decreased (13%).

	Change in Company Size During Past 12 - 18 Months 2026_Q2B								
		Total Sample							
Q2B, Table 5	2026	2024	2022	2020	2018	2016	2014	2012	2010
	(926)	(828)	(843)	(1635)	(1597)	(2419)	(2722)	(1024)	(1077)
Increased	24%	28%>	20%	<24%=	22%	21%	20%>	12%>	7%
Stayed the Same	63%>	56%	<61%	<64% =	67%	65%>	61%=	63%>	55%
Decreased	13%	15%	17%>	11%=	9%	<13%	<18%	<24%	<36%

> and < indicate statistically significant differences in the direction of the arrow

Table 5

Change in Company Size, Continued

1-9 employees:

Far fewer small firms added employees (11% among firms with 1-9 employees) compared with the 44% of firms with 10+ employees that added employees. The difference is that small firms were more likely to have stayed the same (78%) than to have increased (11%) or to have decreased (11%).

- Among smaller firms, there are **no statistically significant year-over-year changes**. Growth (11%), stability (78%), and decline (11%) are all in line with prior readings.

10+ employees:

- Nor are there any statistically significant year over year changes among larger firms.

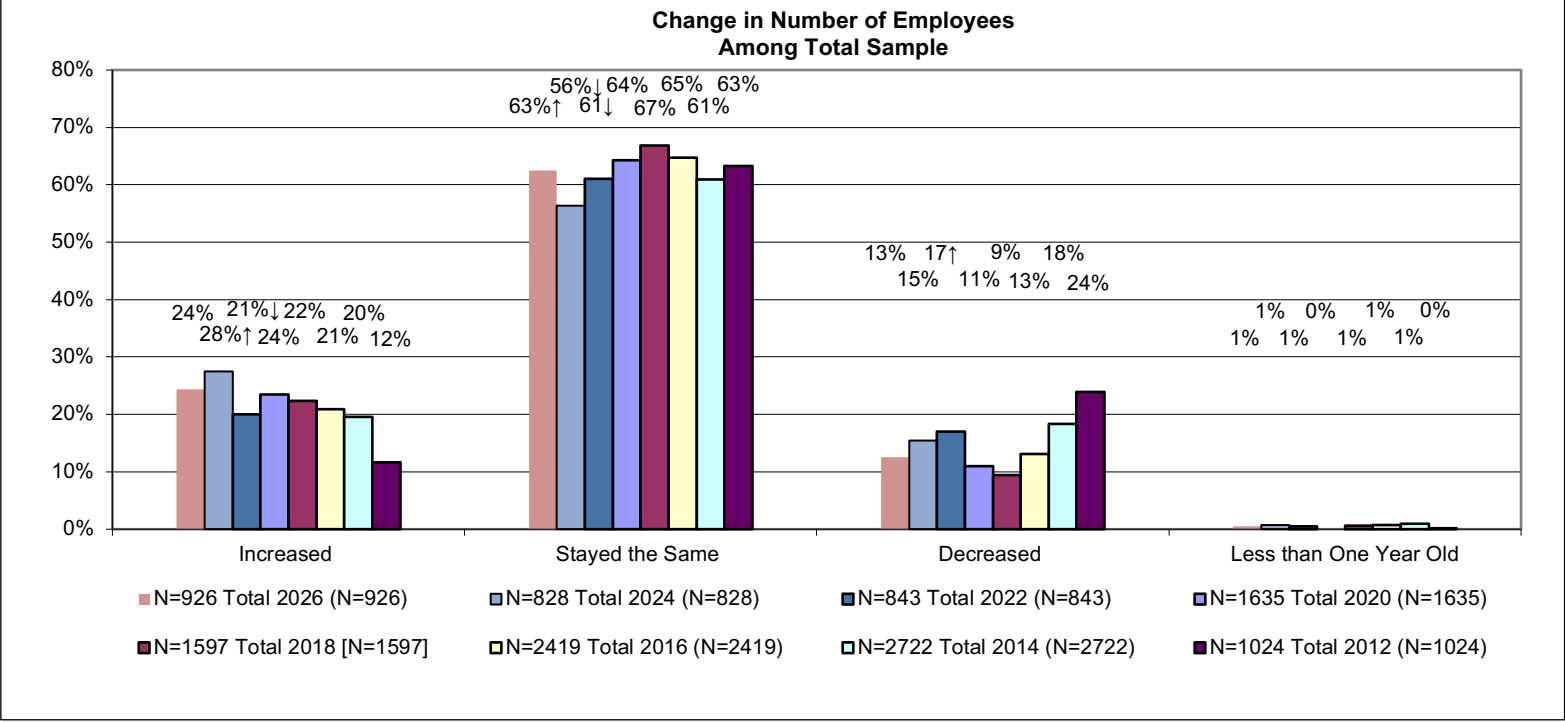
Change in Company Size During Past 12 - 18 Months 2026_Q2B

	1-9 Employees									10+ Employees								
	2026	2024	2022	2020	2018	2016	2014	2012	2010	2026	2024	2022	2020	2018	2016	2014	2012	2010
	(538)	(418)	(471)	(1075)	(1122)	(1744)	(2039)	(759)	(780)	(388)	(407)	(372)	(558)	(469)	(665)	(668)	(258)	(285)
Increased	11%	8%	7%	<10%	10%	11%	12%>	6%=	5%	44%	47%>	36%<	49%=	53%>	47%>	42%>	27%>	15%
Stayed the Same	78%	75%	76%	78%	80%>	75%>	70%=	72%>	67%	42%	37%	42%=	38%=	36%=	38%	35%=	37%>	23%
Decreased	11%	14%	14%>	10	9%	<12%	<17%	<20%	<26%	15%	16%	<21%>	113%>	10%	<15%	<23%	<35%	<61%

Bolded numbers > and < indicate statistically significant differences in the direction of the arrow

Table 5

Note that there is a discrepancy between ECs reporting limited changes in the size of their companies over the past 18 months and the decrease to smaller firms compared to two years ago.



The symbols ↑ and ↓ indicate a significant change in the direction of the arrow at the 90% level of confidence vs. two years earlier

Table 5

Other Firm Characteristics Including NECA Membership and Firm Administration

NECA Membership, Use of IBEW Labor, Percent of Workforce that is Business/Office Worker vs. On-site Electrical Workers, Requirements to Bid on a Project, Business Development and Number of Years in Business, Difficulty Finding and Retaining Skilled Workers

- 23% of firms in this survey are NECA members, a statistically significant decline from the 29% observed in the 2024 Profile Study. However, 2026 results are more on a par with 2022 when NECA membership in Profile Study was 24%. As noted in the past, NECA membership skews to larger firms. As was the case two, four and six years ago, NECA membership is significantly higher among firms with 20+ employees (rather than 10+ employees as was the case in 2018.)
 - NECA membership is 9% among firms with 1-9 employees but 41% among firms with 10+ employees. Further, as shown below, membership likelihood increases with company size:
 - In fact, membership even posts a statistically significant increase between firms with 1-4 employees (7%) and firms with 5-9 employees (17%).

Firm is a NECA Member 2026_Q10A

	Number of Employees							
	Total	1-4	5-9	1-9	10+	10-19	20-99	100+
	(926)	(413)	(125)	(538)	(388)	(106)	(145)	(137)
Yes, Firm is a NECA Member	23	7	<17	9	<41	23	<37	<60

Table 56

Year over year, the main decrease in NECA membership in this study can be traced to firms with 10 or more employees, where it declined from 47% to 41%.

Firm is a NECA Member – Trended_Q10A

Yes, Firm is a NECA Member	Number of Employees															
	Total		1-4		5-9		1-9		10+		10-19		20-99		100+	
	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024
	(926)	(827)	(413)	(306)	(125)	(112)	(538)	(418)	(388)	(407)	(106)	(100)	(145)	(165)	(137)	(142)
	23	<29	7	8	17	24	9	12	41	<47	23	28	37	44	60	64

Bolded > and < indicate statistically significant differences in the direction of the arrow at the 90% level of confidence

Table 56

Firm Uses IBEW Labor

- About one quarter of electrical contracting firms interviewed make use of IBEW labor (23%).
- As was the case in the past, use of IBEW labor rises with the number of employees.
 - Note that 15% of firms with 5-9 employees make use of IBEW compared to only 8% of firms with 1-4 employees and rises to 39% among firms with 20-99 employees and 59% among firms with 100+ employees.
- Use of IBEW labor is also strongly correlated with NECA membership: fully 73% of NECA member firms make use of IBEW labor compared with only 9% of non-NECA firms (not shown).

Firm Uses IBEW Labor -2026 (Q10B)								
	Number of Employees							
	Total	1-4	5-9	1-9	10+	10-19	20-99	100+
	(926)	(413)	(125)	(538)	(388)	(106)	(145)	(137)
	%	%	%	%	%	%	%	%
Yes	23	8	<15	10	<42	24	<39	<59

Bolded > and < indicate statistically significant differences in the direction of the arrow at the 90% level of confidence

Table 57

Firm Uses IBEW Labor Trended (Q10B)																
		Number of Employees														
Total		1-4		5-9		1-9		10+		10-19		20-99		100+		
2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	
(926)	(827)	(413)	(306)	(125)	(112)	(538)	(418)	(388)	(406)	(106)	(99)	(145)	(165)	(137)	(142)	
%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	23	<28	8	9	15	21	10	12	42	44	24	25	39	38	59	63

Bolded > and < indicate statistically significant differences in the direction of the arrow at the 90% level of confidence

Table 57

On-site vs. Office Workers

- As was the case two years ago, there continues to be a very consistent approximately 80/20 split between the average percentage of the workforce that is considered on-site electrical workers vs. the average for being considered primarily business/office workers. (The actual split is 79%/21% or 78%/22% and is consistent across subgroups). This question was asked of the 600+ firms that have more than 3 employees. [Q10C, Tables 58 and 59]
 - There are no statistically significant differences in total or by subgroup in the 2024 Profile Study compared with two years earlier.

Special Designations

The vast majority of firms (83%) do *not* claim/qualify for any of the designations listed below. Further, the vast majority of firms that do qualify (17%) do so for only a *single* designation (14%). The low percentage of qualifying firms may negatively affect some firms as a higher percentage of electrical contractors (19% total, up to 49% for larger firms) say that they encounter Female/Minority/Veteran Man-Hour Workforce Requirements in order to bid a job. (Q.10G,Q.10D Tables 62, 60)

Although at a very low level, larger firms (10+ employees) are more likely than smaller firms to qualify for 2+ designations (2% for small firms vs. 5% for firms with 10+ employees.) Larger firms were more likely to be involved in Women-owned and Hubzone. Two years ago, differences among two company size groups—those with 5-9 (vs. firms with 1-4 employees) and those with 20-99 (vs. firms with 100+ employees)—were more likely to report qualification in one or more of these designations (not shown).

Firm Qualifies for Any of These Designations – 2026_Q10G								
		Number of Employees						
	Total	1-4	5-9	1-9	10+	10-19	20-99	100+
	(926)	(413)	(125)	(538)	(388)	(106)	(145)	(137)
	%	%	%	%	%	%	%	%
Any Designation	17	16	15	16	19	24	20	15
Women-Owned Business (WBE)								
Yes	9	7	6	6	<12	12	14	10
Minority-Owned Business (MBE)								
Yes	8	8	10	8	9	13	8	7
Disabled Veterans Business (DBVE)								
Yes	4	4	4	4	3	4	3	1
Hubzone								
Yes	1	0	0	0	<2	2	1	2
Number of Designations: Only 1								
Only 1	14	14	11	14	14	17	15	12
Number of Designations: Only 2+								
2+	4	2	4	2	<5	7	6	3

Bolded > and < indicate statistically significant differences in the direction of the arrow at the 90% level of confidence

Table 62

- Firms with 5-9 employees are less likely to be women owned than two years ago, while firms with 1-4 employees are more so. The percentage of Disabled Veterans Businesses also rose in firms with 1-4 employees compared with two years ago.
- Hubzone membership, now at 0%, declined compared to two years ago among firms with 5-9 and 1-9 employees.

Firm Qualifies for Any of These Designations –Trended (Q10G)																
			Number of Employees													
	Total		1-4		5-9		1-9		10+		10-19		20-99		100+	
	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024
	(926)	(827)	(413)	(306)	(125)	(112)	(538)	(418)	(388)	(406)	(106)	(99)	(145)	(165)	(137)	(142)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Any Designation	17	18	16	12	15	23	16	15	19	21	24	23	20	24	15	17
Women-Owned Business (WBE)																
Yes	9	9	7>	3	6	<13	6	6	12	12	12	12	14	15	10	9
Minority-Owned Business (MBE)																
Yes	8	9	8	9	10	13	8	10	9	9	13	11	8	8	7	9
Disabled Veterans Business (DBVE)																
Yes	4	3	4>	1	4	6	4	2	3	4	4	5	3	3	1	4
Hubzone																
Yes	1	2	0	0	0	<4	0	<1	2	2	2	3	1	1	2	1

Bolded > and < indicate statistically significant differences in the direction of the arrow at the 90% level of confidence

Table 62

Requirements to Bid a Project—Trended

The need to meet requirements to bid a job is trending down compared with two years ago, in the case of person-hour requirements and in terms of safety programs. Nevertheless, these requirements still fall harder on larger firms.

Across the total sample, 40%—down significantly from 48% two years ago—say that they are required to have a prequalified standards and a safety program in place in order to bid on a project. As we noted two and four years ago, the need to meet standards to bid a job rises with company size, starting with firms with 5-9 employees: specifically, only 15% of firms with 1-4 employees encounter these requirements compared with almost triple that percentage among firms with 5-9 employees (43%) and almost four times that percent (56%) among firms with 10-19 employees. An even bigger increase occurs among firms with 20+ employees: 72% among firms with 20-99 employees and 82% among firms with 100+ employees.

Across the total sample, about one in five (18%, down significantly from 25% two years ago) say that they are required to have person- hour requirement for women, minorities, or veterans in order to bid on a project. This requirement again falls more heavily on larger firms and increases significantly from 6% among firms with 1-4 employees, to 22% among firms with 5-9 employees, and then only jumps again among firms with 100+ employees, in this case, to 49%.

Having a person-hour requirement for women, minorities or veterans in order to bid on a project declined significantly among the total sample (from 25% two years ago to 18% in the current wave), driven by firms with 10+ employees (40% vs. 32% two years ago, not shown.)

- Almost 6 in 10 firms (56%, statistically lower than two years ago when it was 65%) say that they already have a certified safety program in place or that they plan to institute one in 2026; having a certified safety plan also increases steadily with company size.
- Q.10G,Q.10D Tables 62, 60)
- Further, there is there is no longer a shortfall between the percentage of firms that are required to show person hour requirements and those qualifying for those designations (17%) (Q.10G,Q.10D Tables 62, 60)

Prequalified Standards and a Certified Safety Program Needed to Bid a Job (Q10D) -2026								
	Number of Employees							
	Total	1-4	5-9	1-9	10+	10-19	20-99	100+
	(926)	(413)	(125)	(538)	(388)	(106)	(145)	(137)
	%	%	%	%	%	%	%	%
Yes	40	15	<43	21	<71	<56	<72	<82
Female/Minority/Veteran Man-Hour Workforce Requirement Needed to Bid a Job								
Yes	18	6	<22	10	<32	22	<24	<49
Prequalified Standards and a Certified Safety Program In Place or Will be Added in 2026 (Q10F)								
Yes	60	36	<66	43	<84	<71	<86	<93

Bolded > and < indicate statistically significant differences in the direction of the arrow at the 90% level of confidence among the total sample Tables 60 and 61

Nevertheless, the prevalence of having a Certified Safety Program declined vs. two years ago among the total sample (60% vs. 65%).

-- Requirements to Bid a Project

When bidding on jobs that have requirements, one third of respondents (30%) reported requirements of 1%–10% and an addition third (33%) reported an 11%–20% requirement. The average percentage requirement is 17.9%.

Typical Percentage Requirement (Q10E) 2026 Profile Study	
	Total
	(168)
	%
1% - 10%	30
11% -20%	33
21% -30%	18
Higher than 30%	19
Average Percentage Requirement	17.9

Table 1005

Employ Full- or Part-Time Safety Director

Most firms (70%) do not employ either a full-time or part-time Safety Director, Manager or Similar Title. As might be expected, large firms (10+ employers) are much more likely to employ such titles than small firms (1-9 employees) (58% vs. 7%).

Employ Full- Or Part-Time Safety Director, Manager or Similar Title (Q13A2) – 2026 Profile Study			
	Total	1-9	10+
	(924)	(537)	(387)
	%	%	%
Yes (Net)	28	7	<58
Yes, Full Time Safety Director, Manager or Similar Title	18	3	<38
Yes, Part Time Safety Director, Manager or Similar Title	10	4	<20
No, neither	70	92>	40
Not Sure	2	2	3

Bold percentages are significantly higher than *italicized* percentages in the direction of the arrow

Table 1018

Separate Divisions

More firms have a separate Service and Maintenance Division (47%) than any other separate division. About half of that—25%—have a separate low-voltage division. Larger firms grew on this measure vs. two years ago.

Two division types were added in 2026: HVAC mechanical and Plumbing. Both had a low level of involvement.

Presence of Separate Division or Department That Handles the Following Work						
	Total		1-9		10+	
	2026	2024	2026	2024	2026	2024
	(926)	(827)	(538)	(418)	(388)	(406)
	%	%	%	%	%	%
Separate Service and Maintenance Unit [Q7c]						
Currently Has	47	47	37	37	61	57
Plans to Open in Next 1-2 Years	5	5	5	4	5	6
Total Current or Planned	52	52	42	41	66	63
Separate Low-Voltage Unit [Q7a]						
Currently Has	25	26	12	14	44>	38
Plans to Open in Next 1-2 Years	5	6	5	4	6	8
Total Current or Planned	31	32	16	18	50	46
Separate Mechanical [Q7d]						
Currently Has	14	NA	10	NA	19	NA
Plans to Open in Next 1-2 Years	3	NA	3	NA	4	NA
Total Current or Planned	17	NA	13	NA	22	NA
Separate HVAC Voltage Unit [7b]						
Currently Has	13	11	10	10	17<	<i>12</i>
Plans to Open in Next 1-2 Years	4	4	3	4	4	4
Total Current or Planned	16	15	14	14	20<	<i>16</i>
Separate Plumbing [Q7e]						
Currently Has	7	NA	3	NA	12	NA
Plans to Open in Next 1-2 Years	3	NA	3	NA	3	NA
Total Current or Planned	10	NA	6	NA	16	NA

Bold percentages are significantly higher than *italicized* percentages Tables 40, 41,42, 1037, 1038

Employee Relations

Electrical contractors were asked a series of questions about hiring and retaining workers, their use of contract labor, and the extent of their government work.

Almost 6 in 10 (56%) said that they had difficulty in *finding* trained workers; about half that amount (27%) said that they had difficulty *retaining* skilled workers.

- Larger firms have significantly more trouble **both finding and retaining trained** workers. This was also the case two and four years ago.

Extent of Difficulty in Finding or Retaining Trained Workers			
Version 5 (Question 16 – 17)	2026 Profile Study		
	Total	Number of Employees	
		1-9	10+
	(180)	(102)	(78)
	%	%	%
Difficulty in Finding Trained Workers	56	43	<73
Difficulty in Retaining Trained Workers	27	21	<35

Bold percentages are significantly higher than *italicized* percentages

Tables 142, 143

These percentages have not changed significantly from two years earlier.

Extent of Difficulty in Finding or Retaining Trained Workers – Trended						
Version 5 (Question 16 – 17)	Profile Study					
	Total		Number of Employees			
			1-9		10+	
	2026	2024	2026	2024	2026	2024
	(180)	(171)	(102)	(87)	(78)	(83)
	%	%	%	%	%	%
Difficulty in Finding Trained Workers	56	63	43	48	73	80
Difficulty in Retaining Trained Workers	27	33	21	21	35	46

Tables 142, 143

Participation in Government Work

About 6 in 10 of the electrical contractors who participated in Version 5 of the survey have done government work (local, state or federal) since 2024. A similar percentage say that they expect to do government work in 2026. Note that in both instances, work for a *local* government is most prevalent while federal work is mentioned the least. Larger companies are more likely than smaller companies to do each of these types of work and to work for more than one governmental entity. The 58% that report having worked for a governmental entity is statistically unchanged between the past and planning to do so in 2026.

Involvement with Government Projects – 2026 Profile Study						
Version 5 Q19a and 19b	Completed Government Work Since About 2024			Expect to Work on Government Projects in 2026		
	Total	Number of Employees		Total	Number of Employees	
		1-9	10+		1-9	10+
	(179)	(101)	(78)	(179)	(101)	(78)
	%	%	%	%	%	%
<u>Mentioned Any</u>	58	43	<78	59	45	<77
Local	47	33	<65	48	34	<65
State	37	25	<53	37	24	<54
Federal	23	10	<40	26	14	<41
Other	1	1	1	2	2	1
Mentioned Only 1	24	23	26	24	25	23
Mentioned 2+	34	20	<53	35	20	<54

Bold percentages are significantly higher than *italicized* percentages in the direction of the arrow

Tables 145, 146

Number of Years Firm Has Been Business

Across the total sample, 86% of the firms in this survey have been in business for more than 10 years! On average, the electrical contracting firms that participated in this study have been in business an average of 33.7 years.

- As was the case two and four years ago, smaller firms tend to be newer (less than 30 years old, 27.3 years on average), while larger firms are more likely to have been in business for an average of 42.5 years. In fact, 47% of companies with 100+ employees have been in business for more than 50 years! (not shown)

Number of Years Firm Has Been in Business 2026 Profile (Q8A)

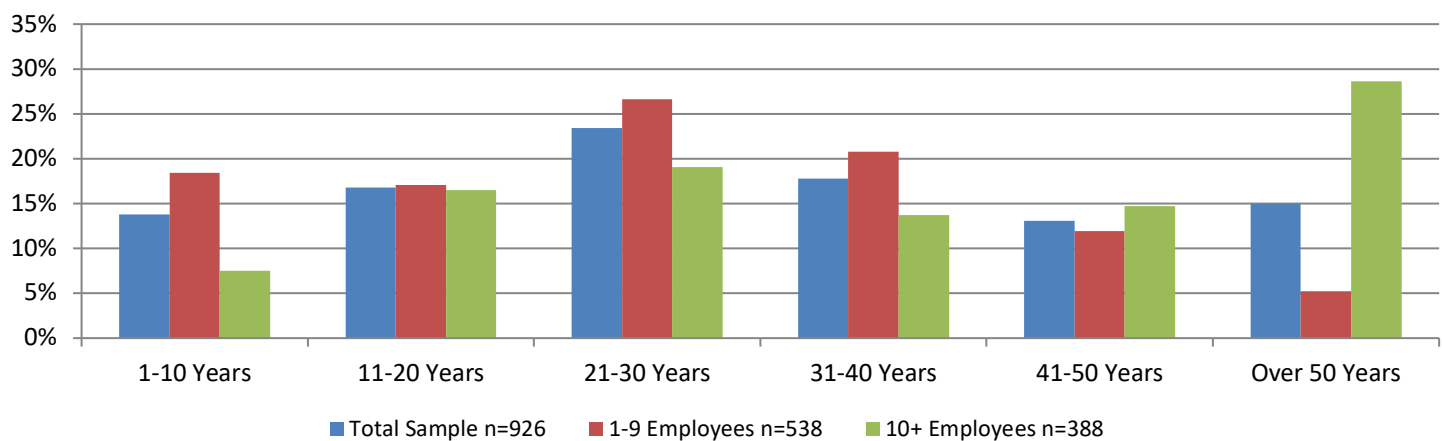


Table 43

Number of Years Firm Has Been in Business (Q8A) –2026 Profile Study			
	Total	1-9	10+
	(926)	(538)	(388)
	%	%	%
1-10	14	18>	8
11-20	17	17	17
21-30	23	27>	19
31-40	18	21>	14
41-50	13	12	15
More than 50 years	15	5	<29
Average Years in Business	33.7	27.3	<42.5

Bold percentages are significantly higher than *italicized* percentages in the direction of the arrow

Table 43

- As shown below, there are no statistically significant differences in total or by subgroup compared with two years ago.

Number of Years Firm Has Been in Business (Q8A)—Trended						
	Total		1-9		10+	
	2026	2024	2026	2024	2026	2024
	(926)	(827)	(538)	(418)	(388)	(407)
	%	%	%	%	%	%
1-10	14	12	18	18	8	6
11-20	17	18	17	20	17	16
21-30	23	23	27	26	19	21
31-40	18	19	21	19	<i>14</i>	<19
41-50	13	11	12	12	15	11
More than 50 years	15	17	5	6	29	27
Average Years in Business	33.7	34.8	27.3	27.2	42.5	42.3

Bold percentages are significantly higher than *italicized* percentages in the direction of the arrow

Table 43

“WHO” WORKS FOR CONTRACTING FIRMS?

Age of Respondents

The results are largely unchanged from two years ago among those 18-54. Regardless of company size (number of employees), the survey respondents tend to be middle aged or older, rather than young. As was the case two years ago, the *average* age of electrical contractors has stabilized.

However, the age breakdown is bifurcating among those older than 54.

- Across the total sample, only 4% are aged 18-34, 27% are between the ages of 35-54, 30% are aged 55-64 (a significant *decrease* from 35% to 30%) while 40% are aged 65+ (a significant increase from 36% two years ago).
- Compared with two years ago, the percentage of respondents between 18 and 54 showed no significant changes. Those aged 55-64 *decreased* while those aged 65+ *increased*, driven by a significant increase among those 75+ (posting a small, but significant increase from 5.9% to 8.4%, not shown). Nor did the *average* age increase from two years ago.² This was also the case in 2024; perhaps the aging of the workforce is leveling off.
- The mean age was also statistically unchanged among the total sample and among firms with 1-9 and 10+ employees.
 - As shown below, note that historically electrical contractors working in larger firms tend to be younger.

² NECA vs. non-NECA The average age is statistically younger among NECA firms (55.7) than non-NECA firms (59.9). Among both NECA and non-NECA firms, the average age held statistically unchanged with two years earlier.

Average Age of Electrical Contractor in 2026 and Earlier (Q11)				
		Firm Size		
	Total	1-4	1-9	10+
		(a)	(b)	©
Average Age (2026 Study) N=926	59.0 (no change from 2024)	61.8 (no change from 2024)	60.8 >c (no change from 2024)	56.5 (no change from 2024)
Average Age (2024 Study) N=828	58.6 (no change from 2022)	62.5 (no change from 2022)	60.7 >c (no change from 2022)	56.6 (no change from 2022)
Average Age (2022 Study) N=843	59.3 (increase from 2020)	61.9 (increase from 2020)	61.2 >c (increase from 2020)	56.9 (increase from 2020)
Average Age (2020 Study) N=1635	57.9	59.9	59.3 (decline from 2018) >c	55.2 (increase from 2018)
Average Age (2018 Study) N=1597	58.2	60.6	60.0 >c	53.8
Average Age (2016 Study) N=2419	57.3	58.7	58.5 >c	54.1
Average Age (2014 Study) N=2722	56.2	57.4	57.1 >c	53.3
Average Age (2012 Study) N=1024	56.1	57.5	57.2 >c	52.6
Average Age (2010 Study) N=1077	53	53.8	53.8 >c	50.4
Average Age (2008 Study) N=1157	51.2	52.6	52.1 >c	49.2

Table 63

As shown below, substantially more electrical contractors were in the older age groups, even in 2006. This is most likely because electrical contractors often run multi-person businesses and it takes time to establish the expertise and financial resources to create a business. However, what we have seen over time is an increasing representation in the older groups (55–64 and 65+).

In particular, while 38% of the electrical contractors were aged 45–54 in 2006, that percentage had dropped by more than half to 18% in 2026. At the same time, the percentages who were aged 55-64 had increased but moderated in 2026, down significantly from 35% in 2024 to 30% in 2026. The percentage aged 65+ had risen five-fold from 8% in 2006 to 40% in 2024. [Table 63-1]

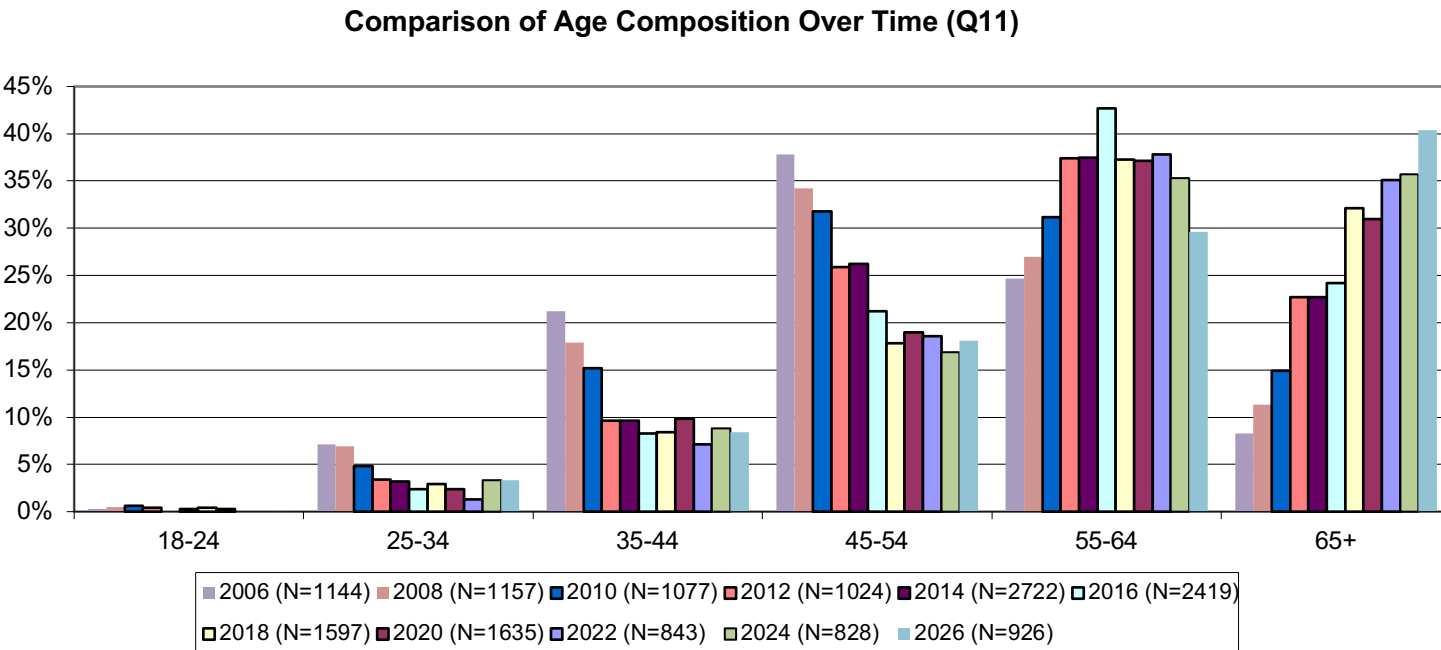


Table 63

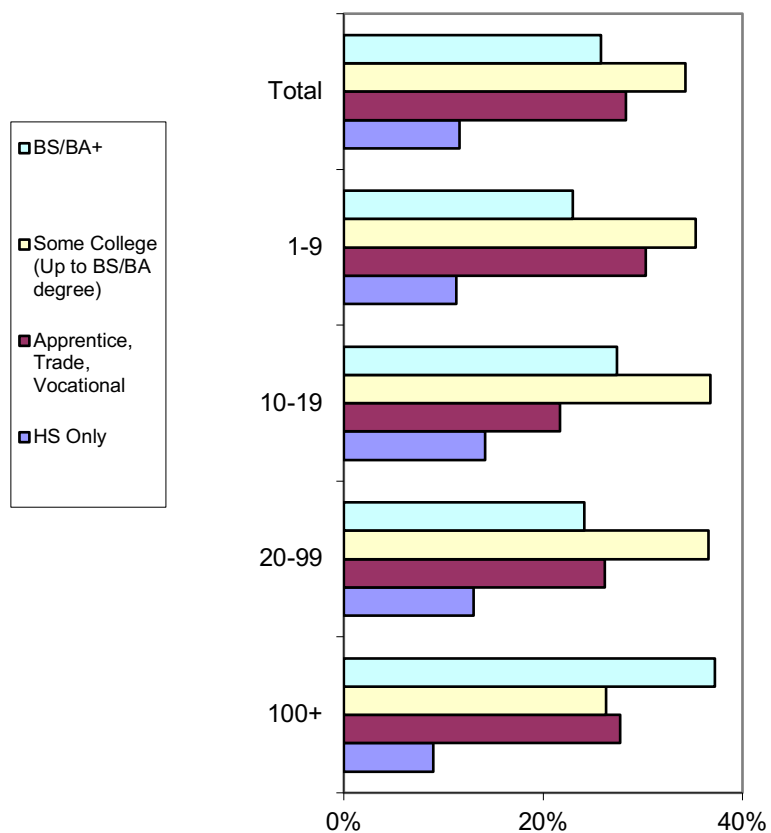
Respondent Education

Six in ten electrical contractors have some college education (60%, unchanged from two years ago when it was 60%).

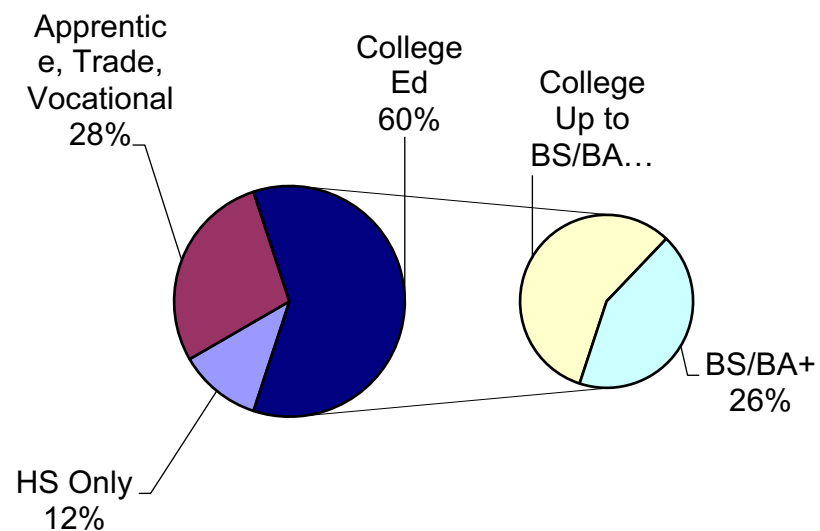
The Any College vs. No College split does not vary markedly by company size, although respondents in firms with 10+ employees are significantly more likely to hold a bachelor's degree or higher (30% in firms with 10+ employees vs. 23% in firms with 1–9 employees.) A further breakdown by company size is shown on the next page. This is shown on the next page in the chart on the left.

- Earlier years not shown.

Respondent Education by Number of Employees 2026 Profile Study_Q12A



Respondent Education Among Total Sample 2026 Profile Study_Q12A



Level of Responsibility

About 7 in 10 of the sample are owners/top management (69%), 12% are Master Electrician or Equivalent Title, 9% are project managers, 5% have some “other” title, 4% are field managers and 1% are apprentices.

- Owner/ top management are more prevalent in smaller than in larger firms. Further, the percent that are owners/top management dropped in larger firms compared with two years ago.
- Field management is more prevalent in larger (10+ firms) and grew compared to two years ago (not shown).
- Project management is more prevalent among larger than smaller firms and grew among firms with 20-99 employees compared with two years ago (not shown).
- Master Electricians are more prevalent in firms with 1-4 employees compared with firms with 5-9 employees. There has been no change compared with 2024.

Level of Responsibility Q13A1						
	Total		Number of Employees			
			1-9		10+	
	2026	2024	2026	2024	2026	2024
	(924)	(827)	(537)	(418)	(387)	(406)
	%	%	%	%	%	%
Owner/Top Management	69	72	82 bigger than 10+	81	51	<62
Master Electrician or Equivalent Title	12	12	11	14	12	9
Project Management	9	8	2	2	18	14
Field Management	4>	3	29	1	9>	5
Apprentice	1	0.2	1	0	2	0.5
Other	5	6	3	2	9	10

Table 67

Bold percentages are significantly higher than *italicized* percentages in the direction of the arrow

Gender

5% of the electrical contractors who participated in this survey are women, statistically unchanged from 2024. The only differences by company size are that women are less likely to be in firms with 10-19 employees and more likely to work in firms with 50+ employees. Interestingly, there is no difference by revenue. They are less likely to be aged 65+. There is no difference by region. (Not shown)

Table 66, Q12C

Where Purchases are Made

Among the total sample, distributors account for the lion's share of purchases with a mean of 63%. Retailers follow distantly at 15%. Sources which are specifically online and direct from the manufacturer account for about 20% of purchases.

- Major changes in this pattern are not anticipated for 2026.

For distributors, the mean of 63% is a statistically significant rise from the 48% level observed in 2024 and returns it to the level observed historically. The mean purchase level rose among both firms with 1-9 and 10+ employees (not shown). Retailers also posted a historical increase to 15% from 10%, mostly due to an increase among small firms.

In contrast direct from manufacturer dropped precipitously from 21% to 5%, among both small and large firms and its drop may suggest that supply chains are less of a problem for historical vendors

	Where Purchases Were Made In 2025/ Expected To Change In 2026					
			Expected To Change In 2026			
V4 Q15 A,B	ANY Purchases Made 2025 (142) %	MEAN Purchases Made 2025 (142) %	Increase %	Same %	Decrease %	Varies
Electrical distributors	97	62.7	15	79	6	(107)
Retailers (big box or local hardware)	74	14.9	10	84	5	(96)
Direct from manufacturer	36	5.3	18	80	2	(61)
Online through a company such as Amazon Business	59	8.0	15	81	4	(78)
Online at website of distributor/retailer	52	8.9	19	78	3	(69)

Tables 99, 100, 101 - 106

Mean Percent of Purchases Made At Specific Sources 2023/2025 - Trended						
	Total		Number of Employees			
			1-9		10+	
V4 Q15 A	2026	2024	2026	2024	2026	2024
	(142)	(177)	(94)	(88)	(48)	(88)
	%	%	%	%	%	%
Electrical distributors	62.7>	<i>47.6</i>	60.6>	<i>41.1</i>	66.6>	<i>54.4</i>
Retailers (big box or local hardware)	14.9>	<i>10.4</i>	18.7 > [larger than 10+]	16.1	7.6	4.9
Direct from manufacturer	<i>5.3</i>	<21.1	<i>3.2</i>	<21.1	<i>9.3</i>	<21.1
Online through a company such as Amazon Business	8.0	8.1	9.1	7.8	6.0	8.2
Online at website of distributor/retailer	8.9	7.8	8.2	9.2	10.3	6.5

Table 99

Bold percentages are significantly higher than *italicized* percentages in the direction of the arrow

Sources Used to Keep Abreast of Electrical Contractor Industry News, Problem-Solving Ideas and New Product Technology

In this question, we asked the electrical contractors taking the survey to tell us—from a list of 13 items—which sources they used to keep abreast of electrical contractor industry news, problem-solving ideas and new technology. As was the case in 2024, the list included media as well as non-media sources such as vendors (i.e., distributors and retailers), seminars, webinars and word-of-mouth.

As shown below, Trade magazines continue to be chosen the most often, by far (87% among the total sample). In contrast, Social Media (33%) and Podcasts (13%) score substantially lower on this measure.

As was the case two years ago, Trade magazine results are equally strong among both small and large firms. More electrical contractors aged 65+ rely on trade magazines compared with those aged 35-54. However, as was the case two years ago, all of the other sources score lower than Trade magazines with the 35-54 age group.

Word of mouth, Webinars, Social media and Podcasts are particularly favored by electrical contractors aged 35 to 54 compared to those aged 55-64, and particularly those aged 65+. Note that all of those sources trail Trade magazines by wide margins, even among electrical contractors aged 35-54.

Compared with those in firms with 1-9 employees, those in larger firms are more likely to use Trade shows, Webinars/Seminars, Podcasts and 4 or more sources. Those in smaller firms are more likely than their larger counterparts to cite Retailers and to use fewer sources.

Online_Q.1 Sources Used to Keep Abreast of Electrical Contractor Industry News, Problem Solving and New Product Technology

Base: Total Respondents

	Number Of			Respondent Age		
	Total	1-9	10+	35-54	55-64	65+
	(389)	(222)	(151)	(102)	(104)	(155)
	%	%	%	%	%	%
<u>Mentioned Any</u>	97	96	97			
<u>Trade Magazine (Net)</u>	87	87	87	80		92
Trade Magazines (Either In Print Or Online)	78	77	80	71		83
Trade Magazine Or Industry Websites	69	65	73			
Distributors	65	62	68			
Manufacturer's Websites Or Online Catalogs	60	57	62			
Search Engines	50	49	54			
Word Of Mouth	53	51	56	63		47
Trade Shows	41	33	<53			
Webinars/Seminars	38	28	<53	49		
Manufacturer's Print Catalogs	39	36	43			
Social Media (Such As FB, Instagram, Twitter Or YouTube)	33	32	33	44		25
Retailers (Big Box Or Local Hardware)	29	32>	24			
Podcasts	13	10	<19	19		10
None	3	4	3			
Mentioned Only 1 Use	3	3	3			
Mentioned 2 - 3 Uses	16	21>	11			
Mentioned 4+ Uses	77	72	<83			

Table 220

Blank cells indicate no difference from Total

Bold indicates significantly larger than the average in the direction of the arrow

Italics indicates significantly smaller than the average

Compared to two years ago, a number of sources posted significant changes among the total sample including the following:

- Increased: Social Media (such as Facebook, Instagram, Twitter (X), YouTube) and Retailers (Big Box or Local Hardware)

Sources Used to Keep Abreast of Electrical Contractor Industry News, Problem- Solving Ideas and New Product Technology (Select all that apply)

Only sources that changed are shown

	2026	2024
Total	(389)	(683)
Social Media (such as Facebook, Instagram, Twitter (X), YouTube)	33>	26
Retailers (Big Box or Local Hardware)	29>	23

Bolded numbers > and < indicate that the percentage is higher or lower at the 90% level of confidence

Table 220

▲ TYPES OF WORK PERFORMED

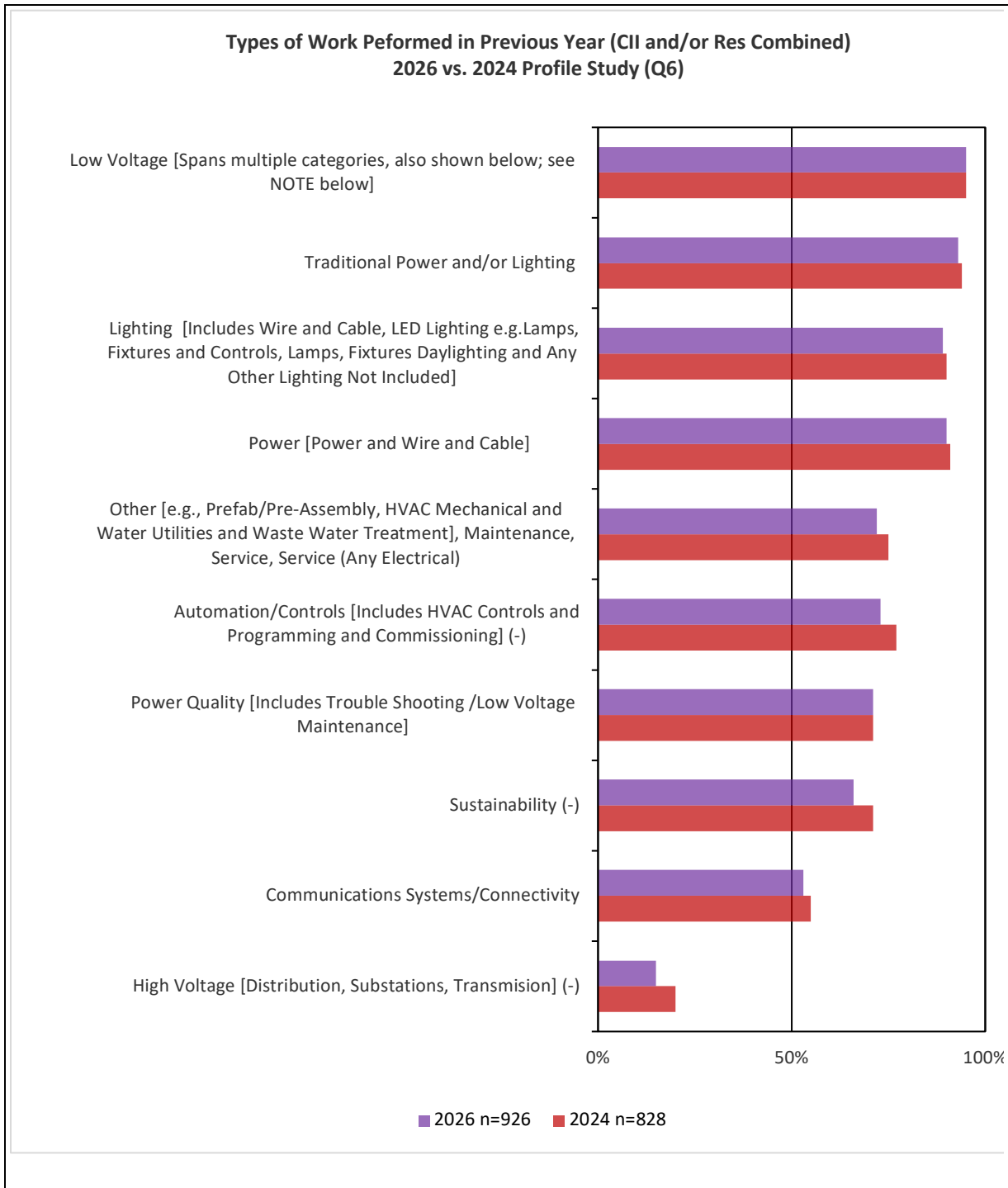


Table 38

NOTE: LOW-VOLTAGE (NET) IN THIS TABLE INCLUDES: NETWORKING, FIBER OPTICS, STRUCTURED WIRING/CABLING, DATA CENTERS, TROUBLESHOOTING/MAINTENANCE OF LOW-VOLTAGE SYSTEMS, LED LIGHTING, LIGHTING CONTROLS, HOME AUTOMATION, FIRE/LIFE SAFETY, SECURITY, HOME THEATER/SOUND, AUTOMATED BUILDING SYSTEMS, INDUSTRIAL CONTROLS, SOUND AND VIDEO, PROGRAMMING AND COMMISSIONING, HVAC CONTROLS.

- indicates a statistically significant decrease compared with 2024 results

Overall, Table 38 shows that work in these categories is strongly related to contractor size, revenue, NECA membership and age. The most important pattern is that broader, more technically complex work is concentrated among larger firms, higher-revenue firms, NECA members and somewhat younger contractors.

The clearest split is by company size. Smaller firms, especially those with 1-4 employees, are more concentrated in traditional power and lighting work, but they are much less likely to be involved in more advanced or integrated categories. Larger firms—particularly those with 20+ employees, 50+ employees and 100+ employees—are much more likely to work in systems-oriented areas such as controls, automation, low-voltage systems, security, communications, programming/commissioning and related technical categories.

Revenue follows the same pattern. Lower-revenue contractors are more narrowly focused, while higher-revenue firms are much more likely to participate in the more specialized and integrated categories. This suggests that these advanced categories require scale, technical staffing and broader project capabilities.

NECA member firms also stand out as more involved in the technically sophisticated portions of the market. They tend to over-index in categories tied to controls, systems integration, communications and complex commercial/institutional/industrial work. Non-NECA firms are more likely to be concentrated in the more basic or smaller-scale portions of the market.

Age differences are less central than size or revenue, but there is still a pattern: older respondents, especially those 65+, tend to be less involved in many of the more advanced or emerging systems categories, while younger and middle-aged respondents are more likely to report involvement in them.

At a high level, the table points to a two-tier market: smaller and lower-revenue contractors remain centered on traditional electrical work, while larger, higher-revenue and NECA-affiliated firms are moving more deeply into integrated building systems, controls, sustainability, communications and other advanced technical work.

Table 38-1

TABLE 38 - Q.6 SPECIFIC CATEGORIES IN WHICH COMPANY WORKED IN 2025 - RESIDENTIAL/C/II (NET) (IN RANK ORDER)
BASE: TOTAL RESPONDENTS

	NECA FIRM/MPANY SIZE (EMPLOYEES Q.2A)										COMPANY SIZE (REVENUE Q.3)										RESP AGE		
	TOTAL	YES	NO	1-4	5-9	1-9	10+	10-19	20-99	100+	50+	<\$250K	\$250K-	\$1M-	\$2.5M-	\$10M+	35-54	55-64	65+				
TOTAL SAMPLE	986	208	718	413	125	538	388	106	145	137	175	275	175	126	137	139	246	274	374				
DK/NA	60	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
TOTAL ANSWERED	926	208	718	413	125	538	388	106	145	137	175	275	175	126	137	139	246	274	374				
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0				
MENTIONED ANY	97.2			98.5	99.2	98.7	95.1	93.4		92.7	94.3	99.3		99.2		93.5							
ANCILLARY (NET)	94.2				99.2			89.6	97.2					96.8									
TRADITIONAL POWER/LIGHTING (NET)	93.3			95.4		95.5	90.2	87.7		88.3	89.7		96.0			89.2	90.7	95.3					
POWER (SUB NET)	90.0																						
POWER	82.7	87.0		80.4											87.6			85.8	78.1				
WIRE AND CABLE	81.9			78.9		79.6	85.1		92.4						89.1				78.6				
LIGHTING (SUB NET)	88.6			91.5		91.4	84.5			82.5	84.0		92.6			83.5		92.3					
LIGHTING - EXCLUDING "OTHER" (SUB NET)	88.1			91.0		90.9	84.3			81.8	83.4	90.9	91.4			82.7		92.3					
LED LIGHTING (INCLUDING LAMPS, FIXTURES AND CONTROLS)	84.4			86.7		86.8	81.2			78.8	80.0							89.4	81.3				
LIGHTING FIXTURES	78.0																	81.8	73.5				
LIGHTING CONTROLS	67.1	77.4		58.8		61.0	75.5		77.9	74.5	75.4	57.8		73.8	79.6	75.5			63.1				
BALLASTS OR LED DRIVERS	60.6			56.4		57.8	64.4		66.9			54.5							55.1				
LAMPS	56.6	63.0																	50.8				
DAYLIGHTING/SHADING SYSTEMS	24.5	39.4		11.4		13.2	40.2		42.8	48.2	49.1	10.5	14.9		37.2	48.9	29.3		18.2				
ANY OTHER LIGHTING NOT INCLUDED ABOVE	24.0	36.5		15.0		18.4	31.7			43.8	41.7	12.7		31.7		39.6	30.1		19.5				
AUTOMATION/CONTROLS SYSTEMS (NET)	73.0	85.1		61.7		65.1	84.0	80.2	86.2	84.7	85.7	57.5			85.4	85.6	78.0						
FIRE/LIFE SAFETY OR SECURITY (SUB-SUB-NET)	54.9	69.7		41.9		46.3	66.8		67.6	73.0	73.1	38.9		62.7	69.3	69.8	61.0		49.2				
FIRE/LIFE SAFETY (INCLUDING ALARMS/DETECTORS)	47.9	63.9		34.1		38.1	61.6		62.1	67.9	68.6	32.0	42.3		63.5	66.2	52.8		43.3				
SECURITY: CCTV/ACCESS/MOTION ETC.	36.6	51.9		23.7		28.1	48.5		45.5	59.1	57.7	23.3	29.7	43.7	47.4	54.7	43.1		30.7				
INDUSTRIAL CONTROLS (INCLUDING PLCs AND VFDs AND SWITCHGEAR)	34.3	56.3		16.0		19.9	54.4	50.0	50.3	62.0	61.7	13.8	26.9		49.6	64.0	39.8		30.7				
HVAC CONTROLS	33.5	45.2		26.2		28.6	40.2		40.7	43.8	46.3	25.5				44.6			30.2				
BUILDING AUTOMATION SYSTEMS/FACILITIES CONNECTIVITY	24.5	43.8		8.0		10.8	43.6	36.8	39.3	53.3	50.9	6.2	13.1	33.3	39.4	48.9	29.7		21.4				
HOME AUTOMATION/SMART HOME/CONNECTIVITY	23.5							39.6	17.2	15.3	14.3			34.1		14.4			20.3				
PROGRAMMING AND COMMISSIONING	23.5	38.5		10.4		13.2	37.9		34.5	49.6	47.4	8.0	16.0		29.9	48.2	31.3	20.1	19.0				
SOUND AND VIDEO OR VDV	15.6	33.2		4.4		6.5	28.1		24.8	37.2	36.0	2.5	9.1	22.2	24.8	31.7	20.7	12.4	12.6				
HOME THEATER/SOUND OR VDV	12.4				18.4							9.5		18.3									
OTHER	72.1	78.8																					
MAINTENANCE/SERVICE/REPAIR (ANY ELECTRICAL)	67.0	74.0															16.7	25.2					
HVAC (MECHANICAL)	21.4																						
PRE-ASSEMBLY/PRE-FABRICATION OF ELECTRICAL COMPONENTS	17.9	36.5		6.3		8.0	31.7		23.4	48.2	42.9	5.5	11.4			43.9	22.4		13.1				
WATER UTILITIES OR WASTE WATER TREATMENT PLANTS	15.0	32.7		5.1		8.0	24.7			35.8	33.7	4.0	10.3			36.7			11.8				
POWER QUALITY (NET)	71.4	81.3		59.6	79.2	64.1	81.4		89.0	78.8	82.3	54.9		82.5	86.1	81.3							
BACKUP POWER/UPS OR ENERGY MANAGEMENT/POWER QUALITY (SUB NET)	51.6	70.2		34.6		39.2	68.8	62.3	69.0	73.7	75.4	29.8		64.3	65.7	77.0	57.7						
BACKUP POWER/UPS	49.2	66.3		32.9		37.5	65.5	58.5	64.8	71.5	72.6	28.4		62.7	62.0	73.4							
ENERGY MANAGEMENT/POWER QUALITY	22.4	40.9		7.3		10.4	38.9	29.2	35.9	49.6	50.3	5.5	13.7		32.1	52.5	32.1		16.6				
POWER GEN SETS	44.7	60.6		30.8		33.5	60.3	56.6	63.4	59.9	63.4	24.7		53.2	59.1	67.6	49.6		39.3				
TROUBLESHOOTING/MAINTENANCE OF LOW VOLTGE SYSTEMS	40.7	59.1		28.6		30.7	54.6	49.1	55.2	58.4	61.1	28.0	32.6		50.4	57.6							
TVSS/LIGHTNING SURGE SUPPRESSION	34.8	48.1		19.1		24.0	49.7	45.3	51.7	51.1	56.6	18.2	25.1	43.7	51.1	55.4							
SUSTAINABILITY (NET)	65.8	76.4		54.2	83.2	61.0	72.4		75.9	73.7	74.9	49.8		77.0	75.9	75.5			61.0				
ELECTRIC VEHICLE CHARGING EQUIPMENT	47.4	56.7		39.2	61.6	44.4	51.5			54.0	54.9	36.7		54.8		57.6			41.4				
LEED PROJECTS/ENERGY EFFICIENCY PROJECTS/UPGRADES (NON-LEED) (SUB N	38.1	54.8		22.0	46.4	27.7	52.6	47.2	52.4	56.9	58.9	18.2		50.8	48.9	59.7	43.9		32.1				
ENERGY EFFICIENCY PROJECTS/UPGRADES (NON-LEED)	31.3	49.0		16.9	39.2	22.1	44.1	39.6	40.0	51.8	52.6	13.8		42.1	40.1	51.8	35.8		26.2				
SOLAR/PHOTOVOLTAICS/WIND GENERATION/FUEL CELLS (SUB NET)	22.6	36.5		15.0		17.7	29.4			42.3	37.7	13.5	17.7			38.1							
SOLAR/PHOTOVOLTAICS	21.7	34.6		14.5		17.3	27.8			40.1	36.0	13.1	17.1			36.7							
LEED PROJECTS	21.5	36.5		8.7		12.5	34.0		34.5	40.9	42.3	7.6	17.1		29.2	43.2	28.0		16.3				
SMART OR NET METERING OR COGENERATION (NET)	19.4	32.7		9.2		12.8	28.6			40.1	37.1	6.9			29.9	34.5	29.3		13.1				
SMART OR NET METERING	15.9	27.4		6.5	22.4	10.2	23.7			35.0	32.6	5.5	12.0		24.1	26.6	25.2		9.4				
ENERGY AUDITS (INCLUDING THERMAL IMAGING)	14.5	28.8		5.6		7.8	23.7		24.8	29.2	29.7	4.4	10.9		21.2	29.5	20.3		10.2				
ENERGY STORAGE SYSTEMS	14.1	26.4		5.3	21.6	9.1	21.1			31.4	27.4	3.3		21.4		25.2	20.3		9.4				
COGENERATION	8.6	17.8		3.6		4.3	14.7			25.5	21.7	2.2				21.6	11.8	6.2					
SMART GRID TECHNOLOGY	5.6	13.9		1.0		1.5	11.3			16.8	14.3	0.7	2.3		9.5	11.5	8.9		2.9				
GEO THERMAL	5.1	8.2		1.9		3.2	7.7			11.7	9.7	2.2	2.9			9.4	8.1	2.9	3.5				
MICROGRIDS	4.4	10.1		0.7		1.5	8.5			13.9	12.0	0.4	1.7			11.5	7.3	1.8					
WIND GENERATION	4.0	8.2		1.9		2.8	5.7		1.4	12.4	9.7	1.5				8.6		2.2					
FUEL CELLS	3.5	9.1		0.7	0.8	0.7	7.2			13.9	10.9	0.4	1.1			9.4		1.8					
COMMUNICATIONS SYSTEMS/CONNECTIVITY (NET)	52.7	73.1		35.1		39.6	70.9	64.2	64.8	82.5	81.1	32.4		62.7	66.4	79.9	61.4		47.6				
COMMUNICATIONS SYSTEMS/CONNECTIVITY (NET) - MINUS DATA CENTERS	51.0	68.3		33.9		38.5	68.3	61.3	64.1	78.1	77.1	31.3		61.9	66.4	74.1	60.6	46.7	46.5				
STRUCTURED WIRING/CABLING/CONNECTIVITY	44.4	63.0		27.4		31.6	62.1	54.7	57.9	72.3	72.6	25.5	38.9	55.6	58.4	67.6	51.6		40.1				
NETWORKING (VOIP/WIRELESS/BROADBAND, ETC.)	30.8	43.3		17.4		20.6	44.8		37.9	58.4	55.4	18.2	21.1	38.9	38.7	51.1	39.8		24.6				
FIBER OPTICS (COMMUNICATIONS AND SECURITY)	24.5	49.5		7.7		10.6	43.8		40.7	59.9	56.6	6.5	13.7		37.2	56.1	32.1		20.6				
DATA CENTERS	16.8	38.0		4.6		6.9	30.7			49.6	44.6	4.0	6.9			43.9							
HIGH VOLTAGE (NET)	14.6	35.1		4.1	6.4	4.6	28.4	20.8	23.4	39.4	38.3	3.6	3.4			39.6			12.3				
DISTRIBUTION	12.4	28.4		3.6	4.0	3.7	24.5		21.4	32.8	32.0	2.9	3.4			33.8							

T38 (Combined Residential & CII) – High Level Trended on N=926

Compared with 2023, the 2025 results show a broad reduction in the range of electrical work performed by contractors. Every statistically significant change in the total market represents a decline, with the decreases concentrated primarily in specialized applications rather than in the industry's core electrical work.

Communications work remained common overall, but participation declined significantly in networking and broadband applications as well as data center projects, indicating softer demand in these technology-focused segments.

Sustainability-related work also contracted. Overall participation in sustainability projects declined, driven by significant decreases in energy efficiency projects, LEED projects and energy audits. These findings suggest that contractors were less likely to be involved in many of the specialized energy and green building activities that had previously supported market growth.

Within traditional power and lighting, the significant declines were concentrated in specialized lighting applications rather than the overall category. Ballasts and LED drivers, lamps, lighting controls, daylighting/shading systems and other lighting applications were all performed by a smaller share of contractors than in 2023.

Power quality work also softened. Contractors were significantly less likely to perform backup power/UPS projects, surge suppression and energy management/power quality work.

Automation and control systems experienced additional declines as a broad category, and with fewer contractors reporting work involving fire/life safety systems, security systems, industrial controls, building automation systems and sound/video applications.

Outside these areas, participation in electrical prefabrication declined significantly, while high-voltage work also contracted, with significant decreases in overall high-voltage projects, distribution and substations.

Overall, the statistically significant changes indicate that between 2023 and 2025 contractors became less involved in a number of specialized electrical disciplines, while the major core categories of electrical construction remained relatively stable.

Note that the declines on a combined RES/CII basis are strongly influenced by CII construction.

Types of Work Performed by Company in 2025 Residential and/or CII Construction on a Combined Basis [Q6, Table 38]							
Base Answering	ANY (926)	RES (926)	CII (926)	Base Answering	ANY (926)	RES (926)	CII (926)
COMMUNICATIONS SYSTEMS/CONNECTIVITY	53	24	44	TRADITIONAL POWER/LIGHTING	93	66 ⁺	72 ⁻
Structured Wiring/Cabling	44	20	37	Lighting	89	62	67 ⁻
Networking VoIP/Wireless/Broadband, etc.)	31 ⁻	12	25 ⁻	LED Lighting (including Lamps, Fixtures and Controls)	84	59	60 ⁻
Data Centers	17 ⁻	N/A	17 ⁻	Lighting Fixtures	78	52	58
Fiber Optics: (Communications and Security)	25	6	24	Ballasts or LED Drivers	61 ⁻	36	46 ⁻
				Lamps	57 ⁻	37	41 ⁻
SUSTAINABILITY	66 ⁻	42	45 ⁻	Lighting Controls	67 ⁻	39	49 ⁻
Energy Efficiency Projects/Upgrades (non-LEED)	31 ⁻	13	26 ⁻	Daylighting/Shading Systems	25 ⁻	11	19 ⁻
Electric Vehicle Charging Equipment	47	33	27	Any Other Lighting Not Included Above	24 ⁻	13 ⁻	17 ⁻
LEED Projects	22 ⁻	8	18 ⁻	Power	90	62	65 ⁻
Solar/Photovoltaics	22	12	14	Power	83	58	58 ⁻
Energy Audits (including Thermal Imaging)	15 ⁻	4	12 ⁻	Wire and Cable	82	55	60 ⁻
Smart or Net Metering	16	8 ⁺	11 ⁻				
Cogeneration	9	3	7	AUTOMATION/CONTROL SYSTEMS	ANY 73 ⁻	RES 42	CII 56
Energy Storage Systems	14	7	9	Fire/Life Safety (incl. Alarms/Detectors)	48 ⁻	24	36 ⁻
Geothermal	5	3	2	HVAC Controls	34	18 ⁺	25 ⁻
Wind Generation	4	2	3	Security: CCTV/Access/Motion, etc.	37 ⁻	17	29 ⁻
Smart Grid Technology	6	2	4	Industrial Controls (including PLCS and VFDS and Switchgear)	34 ⁻	NA	34 ⁻
Fuel Cells	4	1	3	Home Automation/Smart Home/Connectivity	24	24	NA
Microgrids	4	2	3	Home Theater/Sound or VDV	12	12	NA
				Building Automation Systems/Facilities Connectivity	25 ⁻	NA	25 ⁻
POWER QUALITY	ANY 71	RES 42 ⁺	CII 52	Programming and Commissioning	24	7	21
Backup Power/UPS	49 ⁻	22	37 ⁻	Sound and Video or VDV	16 ⁻	NA	16 ⁻
Troubleshooting/Maintenance of Low-voltage Systems	41	20	32				
TVSS/Lightning Surge Suppression	35 ⁻	17	27 ⁻	OTHER	ANY 72	RES 46	CII 55 ⁻
Energy Management/Power Quality	22 ⁻	6	20 ⁻	MSR (Any Electrical)	67	43	50 ⁻
Power Gen Sets (backup or standby power for buildings or larger projects)	45	25	31	HVAC (Mechanical)	21	13 ⁺	14
				Pre-Assembly/Prefabrication of Electrical Components	18 ⁻	6	15 ⁻
LOW-VOLTAGE	95	64	72 ⁻	Water Utilities or Wastewater Treatment Plants	15 ⁻	NA	15 ⁻
The symbols (+) and (-) indicate significant differences at the 90% level of confidence versus the 2024 profile (each reporting on the previous year)				HIGH-VOLTAGE	15 ⁻	NA	15 ⁻
Profile Study (each reporting on the previous year)				Distribution	12 ⁻	NA	12 ⁻
				Substations	8 ⁻	NA	8 ⁻
				Transmission	5	NA	5

Table 34 Residential Summary (Corrected N=926)

Overall, Table 34 shows that residential work is concentrated among smaller, lower-revenue electrical contractors. As company size and revenue increase, contractors become progressively less likely to perform residential work across nearly every category. This suggests that contractor growth is associated with a shift away from residential projects and toward commercial, industrial and institutional markets rather than greater specialization within residential construction.

The strongest relationship is with company size. Smaller firms are consistently more active in residential work, while larger firms are significantly less likely to perform most residential categories. This pattern extends beyond traditional residential electrical work to include more technically advanced areas such as home automation and controls, power quality and sustainability. Although these technologies are more sophisticated, they remain primarily the domain of smaller contractors within the residential market.

Revenue follows the same pattern. Lower-revenue firms are more residentially focused, whereas higher-revenue contractors are significantly less likely to perform residential work across most categories. This indicates that increasing revenue is associated with expanding into larger commercial and industrial projects rather than increasing residential capabilities.

NECA membership also distinguishes residential participation. Non-NECA contractors are generally more active in residential work, while NECA members are less likely to participate across many residential categories, reflecting their greater emphasis on commercial, industrial and institutional projects.

Contractor age shows relatively few consistent differences compared with company size, revenue, or NECA membership. While some individual categories vary by age, age is not a major determinant of residential specialization.

Overall, the findings indicate that residential electrical work—including both traditional installations and more advanced residential technologies—is primarily concentrated among smaller, lower-revenue, non-NECA contractors. As firms grow in size and revenue, their business increasingly shifts toward commercial and industrial work, resulting in lower participation across virtually the entire residential market.

Table 34-1

TABLE 34 - Q.6 SPECIFIC CATEGORIES IN WHICH COMPANY WORKED IN 2025 - RESIDENTIAL (IN RANK ORDER)

BASE: TOTAL RESPONDENTS

	NECA FIRM/COMPANY SIZE (EMPLOYEES Q.2A)										COMPANY SIZE (REVENUE Q.3)										RESP AGE			
	TOTAL	YES	NO	1-4	5-9	10+	10-19	20-99	100+	50+	<\$250K	\$250K-	\$1M-\$2.5M	\$2.5M-\$10M	\$10M+	35-54	55-64	65+						
TOTAL SAMPLE	986	208	718	413	125	538	388	106	145	137	175	275	175	126	137	139	246	274	374					
DK/NA	60	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0					
TOTAL ANSWERED	926	208	718	413	125	538	388	106	145	137	175	275	175	126	137	139	246	274	374					
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0					
MENTIONED ANY	68.1	45.7		86.2	75.2	83.6	46.6	50.3	31.4	32.6	92.7	77.7		53.3	31.7	63.8		70.4						
TRADITIONAL POWER/LIGHTING (NET)	66.4	43.3		84.7	74.4	82.3	44.3	57.5	47.6	30.7	31.4	90.5	77.1		51.1	29.5		70.4						
LIGHTING (SUB NET)	62.4	40.4		81.1	72.0	79.0	39.4	52.8	42.1	26.3	26.3	86.9	75.4		46.7	23.7		57.3						
LIGHTING - EXCLUDING "OTHER" (SUB)	62.1	39.9		81.1	71.2	78.8	38.9	51.9	41.4	26.3	25.7	86.9	75.4		46.0	23.7		56.9						
LED LIGHTING (INCLUDING LAMPS, LIGHTING FIXTURES)	58.7	38.5		75.8	68.8	74.2	37.4	50.0	40.0	24.8	24.0	80.7	70.3		44.5	23.0		64.2						
LIGHTING CONTROLS	51.9	35.6		64.9	60.8	63.9	35.3	37.2	24.8	24.0	70.5	61.7		39.4	23.7		57.3							
LAMPS	37.1	24.5		46.2		45.4	25.8	24.1	19.0	18.9	48.7	42.9		26.3	16.5		41.2		32.9					
BALLASTS OR LED DRIVERS	36.4	22.1		43.3		42.8	27.6	27.6	17.5	16.6	46.5	42.3		29.9	16.5									
ANY OTHER LIGHTING NOT DAYLIGHTING/SHADING SYSTEMS	13.1			21.6										20.6										
	10.8																							
POWER (SUB NET)	62.2	41.8		78.7	69.6	76.6	42.3	54.7	46.2	28.5	29.1	85.1	71.4		49.6	28.1								
POWER	57.5	39.9		70.9	64.8	69.5	40.7		44.8	27.7	28.0	76.4	66.3		48.2	26.6		63.1		52.7				
WIRE AND CABLE	55.2	38.0		68.5	63.2	67.3	38.4		43.4	24.1	24.6	75.3	61.7		46.7	23.7								
ANCILLARY (NET)	63.3	41.3		80.1	74.4	78.8	41.8	55.7	44.1	28.5	29.1	86.2	74.3		49.6	28.1		58.5		67.5				
OTHER	45.8	33.2		58.1	54.4	57.2	29.9	29.7	21.2	20.6	64.0				35.8	19.4								
MAINTENANCE/SERVICE/REPAIR	43.2	32.2		54.7	51.2	53.9	28.4	26.9	19.7	19.4	60.4				32.1	18.7		38.2						
HVAC (MECHANICAL)	13.1	8.7		16.9		17.1	7.5	8.5	3.8	5.1	19.3				7.3	5.8		6.9						
PRE-ASSEMBLY/PRE-FABRICATION	6.2	10.1		3.9		4.5	8.5		10.9															
WATER UTILITIES OR WASTE	-	-		-		-	-	-	-	-	-	-	-	-	-	-	-	-	-					
SUSTAINABILITY (NET)	42.2	29.3		47.7	63.2	51.3	29.6	31.0	19.0	17.7	47.3	56.0	51.6		18.7									
ELECTRIC VEHICLE CHARGING	32.9	24.0			53.6	39.6	23.7	23.4	16.1	14.9		45.1	43.7		15.8			29.1						
LEED PROJECTS/ENERGY	17.1			28.8	19.3	13.9			10.2	10.3					10.8									
ENERGY EFFICIENCY	13.1			21.6					8.8															
SOLAR/PHOTOVOLTAICS/WIND	12.5			20.8		14.1	10.3	6.9						18.3										
SOLAR/PHOTOVOLTAICS	11.9			20.8		13.8	9.3	6.2						18.3										
SMART OR NET METERING OR	9.8			7.7	19.2							6.9		15.3		5.0	15.0		7.2					
SMART OR NET METERING	8.1			5.6	18.4							5.5				5.0	12.6		5.3					
LEED PROJECTS	7.8			5.8	16.8																			
ENERGY STORAGE SYSTEMS	7.1			4.6	16.0							2.5		14.3			9.8		4.8					
ENERGY AUDITS (INCLUDING COGENERATION)	4.4			2.9																				
GEOTHERMAL	3.3			1.7	7.2												5.3							
SMART GRID TECHNOLOGY	2.3	6.3		0.7		1.1	3.9					0.7					5.7	1.8		0.8				
WIND GENERATION	1.8																4.5							
MICROGRIDS	1.5			0.7								0.4					3.3	0.4						
FUEL CELLS	1.1	2.9		0.5	-	0.4	2.1					0.4												
POWER QUALITY (NET)	42.0	30.3		48.7	53.6	49.8	31.2	33.8	16.8	16.6	50.2	50.9			16.5									
POWER GEN SETS	24.6	19.7			27.0	21.4	34.0		10.9	10.3		34.3	31.0		12.2									
BACKUP POWER/UPS OR ENERGY	22.1			24.7	30.4	26.0	16.8	15.2	13.1	11.4		28.0			11.5									
BACKUP POWER/UPS	21.2				30.4	25.1	15.7	13.8	12.4	10.9		26.3			11.5									
TROUBLESHOOTING/MAINTENANCE	20.2				22.3	17.3	27.4		10.9	10.9		24.4			10.1									
TVSS/LIGHTNING SURGE	17.2				28.0				10.2	10.9					9.4									
ENERGY MANAGEMENT/POWER	5.5			3.4								2.2				8.9		3.2						
AUTOMATION/CONTROLS SYSTEMS	41.8	30.8		48.4	48.8	48.5	32.5	31.7	21.9	21.1	49.1	52.0			20.9									
FIRE/LIFE SAFETY OR SECURITY	29.2	22.6		33.2	36.0	33.8	22.7		18.2	17.1	33.5				14.4									
FIRE/LIFE SAFETY (INCLUDING HOME AUTOMATION/SMART	24.0	18.3				27.1	19.6		16.1	14.3					14.4									
HVAC CONTROLS	18.3				26.4	21.9	13.1	39.6	17.2	15.3	14.3		34.1		14.4			20.3						
SECURITY	17.2							9.7	11.7	10.9		25.1		11.7	10.8									
HOME THEATER/SOUND OR VDV	12.4				18.4					13.1		9.5		18.3		12.2								
PROGRAMMING AND BUILDING AUTOMATION	7.2			4.1	12.8							4.0												
INDUSTRIAL CONTROLS	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-					
SOUND AND VIDEO OR VDV	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-					
COMMUNICATIONS	24.1				32.8			18.6		17.7		29.1			15.8									
STRUCTURED	19.8				27.2		26.4			14.9					14.4									
NETWORKING	12.4			9.9																				
FIBER OPTICS / COMMUNICATIONS	5.7	8.7		3.9		4.5	7.5		10.9	9.7	3.6					16.3		9.6						
DATA CENTERS	0.2																							
ANY HVAC CONTROLS OR	23.0	16.3		29.1	29.6	29.2	14.4	13.1	11.7	10.9	30.5	29.7		15.3	10.8	19.1								
HVAC CONTROLS AND MECHANICAL	8.3				14.4	9.9	6.2	4.8		5.1				3.6		4.9								
NONE/NOT ANSWERED	38.3	54.3		13.8	24.8	16.4	53.4	49.7	68.6	67.4	7.3	22.3		46.7	68.3		28.1	31.8						
LOW VOLTAGE WORK (NET)*	64.0	42.8		82.1	71.2	79.6	42.5	45.5	27.0	28.0	87.6	76.0		51.1	26.6		69.0							
MENTIONED 1	11.6	7.7		18.4	7.2	15.8	5.7	4.7	1.5	4.0	19.6		4.8		3.6		15.3							
MENTIONED 2 - 3	21.7	10.6		31.0		29.9	10.3		8.3		5.1	34.5		12.4	4.3									
MENTIONED 4 - 5	14.1	6.3		18.9		17.3	9.8				18.5		8.7		4.3									
MENTIONED 6 - 7	8.2								2.9	4.6														
MENTIONED 8 - 9	5.1																							
MENTIONED 10 - 11	2.6			1.2				0.7																
MENTIONED 12 - 16	0.8			-		0.2	1.5						1.1											

* NOTE: LOW VOLTAGE (NET) - IN THIS TABLE - INCLUDES: NETWORKING, FIBER OPTICS, STRUCTURED WIRING/CABLING, DATA CENTERS, TROUBLE SHOOTING/MAINTENANCE OF LOW VOLTAGE SYSTEMS, LED LIGHTING, LIGHTING CONTROLS, HOME AUTOMATION, FIRE/LIFE SAFETY.

4-13-26, Updated 5-11-26

Green cells indicate the number is statistically significantly larger than the total. Red indicates the number is statistically significantly smaller than the total.

T34 Residential Trended Summary (N=926)

Overall, residential electrical work changed very little between 2023 and 2025. Most categories remained statistically unchanged, with only a handful of significant increases and decreases, indicating that the residential market has been relatively stable over the two-year period.

Traditional power and lighting showed the most notable increase, with overall participation rising significantly. This suggests continued strength in core residential electrical installations despite relatively little movement in most individual lighting and power categories.

Within sustainability, overall participation remained stable, but Smart or Net Metering increased significantly, reflecting modest growth in technologies that support energy monitoring and grid interaction.

Automation and control systems also remained largely unchanged overall. However, HVAC Controls increased significantly, suggesting growing demand for integrated residential climate control systems.

Power Quality was one of the few major categories to post a significant gain overall, indicating increased emphasis on electrical reliability, backup power and related power quality solutions in residential projects, although none of the individual project types showed significant changes.

The “Other” category was generally stable, although HVAC (Mechanical) work increased significantly, pointing to greater integration of electrical and mechanical work within residential projects.

Only two individual categories declined significantly over the period. Residential involvement in Data Centers was not asked in the most recent in study, reflecting the limited role of this type of work in the residential market, while Any Other Lighting Not Included Above also declined modestly.

Overall, the residential market experienced only modest change from 2023 to 2025. The significant gains that did occur were concentrated at the category level in traditional power, lighting and power quality. The individual categories of Smart or net metering, and HVAC-related work rose, while only a small number of specialized categories declined (particularly non-LEED energy efficiency projects/upgrades) and the vast majority of residential work remained stable.

Types of Residential Work Performed by Company in 2025 vs. 2023 [Q6, Table 34]

Base Answering	(926)		(828)
COMMUNICATIONS SYSTEMS/CONNECTIVITY	2025		2023
	24		23
Structured Wiring/Cabling	20		18
Networking VoIP/Wireless/Broadband, etc.)	12		13
Data Centers	0	NA	4
Fiber Optics Communications and Security)	6		4

SUSTAINABILITY	2025		2023
	42		41
Energy Efficiency Projects/Upgrades (non-LEED)	13	<	16
LEED Projects	8		10
Energy Audits (including Thermal Imaging)	4		4
Solar/Photovoltaics	12		10
Electric Vehicle Charging Equipment	33		31
Smart or Net Metering	8	>	6
Cogeneration	3		3
Energy Storage Systems	7		6
Wind Generation	2		1
Geothermal	3		3
Fuel Cells	1		1
Smart Grid Technology	2		2
Microgrids	2		1

POWER QUALITY	2025		2023
	42	>	36
Backup Power/UPS	22		23
Trouble Shooting/Maintenance of Low-voltage Systems	20		20
TVSS/Lightning Surge Suppression	17		18
Energy Management/Power Quality	6		5

LOW-VOLTAGE WORK	2025		2023
	64		60

Base Answering	(926)		(828)
TRADITIONAL POWER/LIGHTING	2025		2023
	66	>	61
Lighting	62		59
LED Lighting (Including Lamps, Fixtures and Controls)	59		56
Lighting Fixtures	52		49
Ballasts or LED Drivers	36		37
Lamps	37		38
Lighting Controls	39		39
Daylighting/Shading Systems	11		13
Any Other Lighting Not Included Above	13	<	16
Power	62		59
Wire and Cable	55		52
Power	58		54

AUTOMATION/CONTROL SYSTEMS	2025		2023
	42		41
Fire/Life Safety (including Alarms/Detectors)	24		24
Industrial Controls (including PLCs and VFDS, Switchgear)	0		0
HVAC Controls	18	>	15
Security: CCTV/Access/Motion, etc.	17		19
Building Automation Systems/Facilities Connectivity	0		0
Sound and Video or VDV	0		0
Programming and Commissioning	7		7
Home Automation/Smart Home/Connectivity	24		25
Home Theater/Sound or VDV	12		14

OTHER	2025		2023
	46		43
Maintenance/Service/Repair (Any Electrical)	43		41
Preassembly/Prefabrication of Electrical Components	6		6
HVAC (Mechanical)	13	>	9
Water Utilities or Wastewater Treatment Plants	0		0

The symbols (+) and (-) indicate significant differences at the 90% level of confidence versus the 2024 profile (each reporting on the previous year) Profile Study (each reporting on the previous year).

Table 36 overview:

C/I/I work shows the opposite pattern. NECA firms, larger contractors and higher-revenue firms are significantly more involved, especially in lighting, controls, automation, low-voltage and other more technical systems work.

T36 Current-Wave Summary (N=926)

Overall, Table 36 shows that commercial, industrial and institutional (CII) work is concentrated among larger firms, higher-revenue contractors and NECA members. As firms grow, they participate in a broader range of technically sophisticated work, reflecting greater technical capabilities, staffing and project complexity.

The strongest relationship is with company size. Larger contractors are much more likely to perform advanced CII work, including communications systems, controls, automation, power quality, security, programming, commissioning and other integrated building systems. Smaller firms remain more focused on traditional electrical work and participate in fewer specialized categories.

Revenue follows the same pattern. Higher-revenue firms are significantly more likely to be involved in advanced and technically demanding CII projects, suggesting that these markets require greater organizational scale, specialized expertise and project management resources.

NECA membership also distinguishes contractors. NECA firms consistently report greater participation in technically sophisticated CII work, reflecting their stronger presence in larger CII projects.

Contractor age shows a much weaker relationship than company size, revenue or NECA membership. Although some individual differences are evident, age is not a major determinant of the types of CII work performed.

Overall, the table indicates that CII work becomes broader and more technically complex as firms increase in size and revenue. Larger, higher-revenue and NECA-affiliated contractors are the most active across the widest range of advanced CII work categories.

TABLE 36 - Q.6 SPECIFIC CATEGORIES IN WHICH COMPANY WORKED IN 2025 - C/I/I (IN RANK ORDER)																				
BASE: TOTAL SECURITY, HOME THEATER/SOUND, AUTOMATED BUILDING SYSTEMS, INDUSTRIAL CONTROLS, SOUND AND VIDEO, PROGRAMMING AND COMMISSIONING, HVAC CONTROLS																				
	NECA FIRM/PANY SIZE (EMPLOYEES Q.2A)										COMPANY SIZE (REVENUE Q.3)									
	TOTAL	YES	NO	1-4	5-9	1-9	10+	10-19	20-99	100+	50+	<\$250K	\$250K-	\$1M-\$2.5M	\$2.5M-\$10M	\$10M+	35-54	55-64	65+	
TOTAL SAMPLE	986	208	718	413	125	538	388	106	145	137	175	275	175	126	137	139	246	274	374	
DK/NA	60	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
TOTAL ANSWERED	926	208	718	413	125	538	388	106	145	137	175	275	175	126	137	139	246	274	374	
MENTIONED ANY	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
TRADITIONAL	76.9	89.9		63.4	84.8	68.4	88.7	88.7	88.3	89.1	90.3	56.0		88.9	89.8	90.6	81.7			
LIGHTING (SUB NET)	71.6	86.1		59.1	78.4	63.6	82.7	79.2	82.8	85.4	86.3	50.2		79.4	84.7	87.1				
LIGHTING - EXCLUDING	66.6	82.2		54.2	73.6	58.7	77.6	76.4	76.6	79.6	80.6	45.1		76.2	80.3	81.3				
LED LIGHTING	66.2	81.3		53.8	72.8	58.2	77.3	76.4	76.6	78.8	80.0	45.1		75.4	80.3	80.6			62.8	
LIGHTING FIXTURES	60.0	76.9		46.0	67.2	50.9	72.7	68.9	74.5	73.7	74.9	37.1		71.4	75.2	78.4	64.6		56.4	
LIGHTING CONTROLS	58.3	73.6		44.6		48.9	71.4	68.9	70.3	74.5	75.4	37.1		68.3	74.5	74.8	65.0		53.3	
BALLASTS OR LED	49.0	73.1		30.5		35.1	68.3	62.3		69.7	71.5	22.9	42.9	60.3	72.3	72.7	56.1		43.3	
LAMPS	46.4	59.6		34.6		38.5	57.5		57.9	61.3	60.6	27.6		54.8	58.4	60.4	53.3		40.6	
DAYLIGHTING/SHADING	40.9	56.7		29.8		32.5	52.6		54.5	55.5	53.7	22.5			53.3	55.4	46.3		36.3	
ANY OTHER LIGHTING	18.5	36.1		4.4	8.8	5.4	36.6		37.9	44.5	45.1	2.5	6.9		32.1	46.0	24.0		12.8	
POWER (SUB NET)	17.1	31.7		7.0		9.3	27.8		22.8	40.9	37.7	3.3	12.0	23.0		36.7	23.2	13.9	13.4	
WIRE AND CABLE	64.9	82.2		47.5	73.6	53.5	80.7	77.4	81.4	82.5	84.0	39.6		77.0	83.2	85.6	71.1			
POWER	59.7	78.4		41.6		47.2	77.1	69.8	81.4	78.1	80.6	34.9		70.6	80.3	82.7	66.7		54.8	
ANCILLARY (NET)	57.7	78.4		39.2	65.6	45.4	74.7	70.8	73.1	79.6	80.0	32.4		69.0	78.8	82.7	65.9		53.2	
AUTOMATION/CONTROLS	71.1	88.0		52.5	84.0	59.9	86.6	84.0	86.9	88.3	89.7	45.5		86.5	87.6	90.6	77.2		66.3	
FIRE/LIFE SAFETY OR	55.6	78.8		33.2		38.8	78.9	73.6	79.3	82.5	83.4	24.4		69.0	79.6	83.5	64.6		51.3	
FIRE/LIFE SAFETY	41.4	66.3		19.1		25.3	63.7	54.7	64.1	70.1	70.3	14.2	32.0	55.6	67.9	66.2	48.8		35.6	
INDUSTRIAL CONTROLS	35.6	60.6		13.8		19.0	58.8	50.0	59.3	65.0	65.7	10.9	23.4	46.8	62.0	63.3	41.9		30.7	
SECURITY	34.3	56.3		16.0		19.9	54.4	50.0	50.3	62.0	61.7	13.8	26.9		49.6	64.0	39.8		30.7	
HVAC CONTROLS	29.0	49.0		12.6		17.1	45.6		42.8	56.9	55.4	8.7	22.9	38.9	46.0	51.8	36.6		24.1	
BUILDING AUTOMATION	24.7	38.9		14.3		16.5	36.1		37.9	40.1	42.9	10.5		34.3	42.4	30.1	21.4		21.4	
PROGRAMMING AND	24.5	43.8		8.0		10.8	43.6	36.8	39.3	53.3	50.9	6.2	13.1	33.3	39.4	48.9	29.7		21.4	
SOUND AND VIDEO OR	20.8	36.5		7.7		10.0	35.8		33.1	46.7	45.1	5.5	12.6		27.7	46.0	29.3	16.8		
HOME	15.6	33.2		4.4		6.5	28.1		24.8	37.2	38.0	2.5	9.1	22.2	24.8	31.7	20.7	12.4	12.6	
HOME	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
POWER QUALITY (NET)	51.9	75.5		29.1	60.8	36.4	73.5	65.1	77.2	75.9	78.9	20.7		69.0	77.4	77.0	58.5			
BACKUP POWER/UPS	38.8	63.0		16.5		21.6	62.6	55.7	61.4	69.3	70.9	11.3	28.6	53.2	59.9	72.7	47.6	34.7		
BACKUP	36.6	58.7		15.0		19.9	58.8	52.8	58.6	67.4	67.4	9.8	26.9	52.4	56.2	69.1	43.5	32.5		
ENERGY	19.5	38.5		5.3		7.8	27.4	31.7	46.7	53.4	54.4	4.4	9.7		27.7	44.4	27.6		15.2	
TROUBLESHOOTING/MAINTENANCE	32.3	54.3		17.2		20.3	49.0	41.5	49.0	54.7	57.7	14.2	25.1		43.8	54.7		28.5		
POWER GEN SETS	30.8	53.8		11.4		15.1	52.6	41.5	55.9	57.7	60.6	5.5	22.3		52.6	64.0	39.0		27.5	
TVSS/LIGHTNING SURGE	26.6	42.8		8.7		13.6	44.6	39.6	46.2	46.7	52.0	5.8	17.7	36.5	44.5	51.8				
SUSTAINABILITY	44.9	69.7		21.5	59.2	30.3	65.2	55.7	66.9	70.8	72.0	15.3		57.9	67.2	73.4	53.3		38.5	
LEED	31.4	51.0		13.6		18.8	49.0	43.4	48.3	54.0	56.0	8.4		43.7	45.3	57.6	39.4		25.1	
ELECTRIC VEHICLE	26.5	48.1		10.2		14.5	43.0	34.9	42.1	50.4	51.4	6.9	19.4	34.1	40.1	54.7	32.9		21.7	
ENERGY EFFICIENCY	25.9	46.2		10.2		15.2	40.7	34.9	37.2	48.9	50.3	7.3	21.1	36.5	35.8	50.4	31.7		20.9	
LEED PROJECTS	17.9	33.2		5.8		8.4	31.2		31.7	37.2	38.9	3.6	13.1		26.3	40.3	24.4		13.1	
SOLAR/PHOTOVOLTAICS/WIND	14.6	31.7		5.3		6.7	25.5			39.4	34.9	4.4	6.3		20.4	35.3	18.3		11.5	
SMART OR NET METERING	14.0	29.3		3.6		6.3	24.7			37.2	34.3	2.2	8.6		23.4	33.1	21.1		9.6	
ENERGY AUDITS	13.7	29.8		4.8		6.3	24.0	19.8		35.8	32.0	4.0	6.3		19.0	33.8	17.9		10.7	
SMART OR NET	12.4	26.4		4.1		5.9	21.4		22.8	26.3	27.4	2.9	8.6		18.2	28.1	17.1		9.1	
ENERGY STORAGE	11.4	24.0		2.4		5.0	20.4			31.4	29.1	2.2	5.7		20.4	24.5	19.1		7.0	
COGENERATION	9.4	21.6		1.7		3.9	17.0			27.0	24.0	1.1	5.1		13.9	22.3	14.2	6.9	6.7	
SMART GRID	6.5	15.4		1.5	3.2	1.9	12.9			23.4	20.0	0.7	2.9			20.9				
MICROGRIDS	4.0	10.6		0.2	0.8	0.4	9.0			13.9	12.0	-	0.6		7.3	9.4			2.7	
FUEL CELLS	3.3	8.2		-		0.7	7.0			11.7	10.3	-	0.6			10.1	5.3	1.5		
WIND GENERATION	2.8	7.2		0.2	0.8	0.4	6.2			12.4	9.7	-	0.6			8.6		1.1		
GEOTHERMAL	2.6	6.3		0.7		1.5	4.1		0.7	9.5	7.4	0.7	0.6			7.2				
COMMUNICATIONS	2.4	5.8		0.2		0.7	4.6			9.5	8.0	-	0.6	0.8		7.2			1.3	
COMMUNICATIONS	44.0	69.7		21.5		27.5	66.8	60.4	60.0	78.8	77.7	17.5	37.1	57.1	62.8	77.0	54.1		38.8	
STRUCTURED	42.2	64.9		20.3		26.4	64.3	57.5	73.7	74.5	75.9	15.6	36.7	56.3	71.2	86.3	37.7	36.5		
NETWORKING	36.8	60.1		16.7		21.6	58.0	49.1	54.5	68.6	69.1	13.1	29.1	50.0	55.5	64.0	45.1		32.6	
FIBER OPTICS	25.1	39.9		9.9		13.8	40.7	33.0	33.8	54.0	51.4	8.7	16.6	34.9	35.8	47.5	33.3		20.3	
DATA CENTERS	21.9	47.1		4.8		7.8	41.5		39.3	55.5	53.1	3.3	10.3	28.6	35.0	54.0	30.1	17.9	18.4	
HIGH VOLTAGE (NET)	16.6	37.5		4.4		6.5	30.7			49.6	44.6	3.3	6.9			43.9		13.5		
DISTRIBUTION	14.6	35.1		4.1	6.4	4.6	28.4	20.8	23.4	39.4	38.3	2.6	3.4			39.6			12.3	
SUBSTATIONS	12.4	28.4		3.6	4.0	3.7	24.5		21.4	32.8	32.0	3.9	3.4			33.8				
TRANSMISSION	8.2	21.6		2.2	2.4	2.1	16.6		26.3	24.0	1.8	1.7				25.9	11.8	4.7		
OTHER	5.2	13.9		1.0		1.5	10.3			17.5	16.0	1.1	1.7			16.5		2.6		
WATER UTILITIES OR PRE-ASSEMBLY/PRE-ENGINEERING	55.1	73.6		39.5	68.0	46.1	67.5	67.9	63.4	71.5	72.6	34.5		68.3	67.9	73.4			51.6	
HVAC (MECHANICAL)	50.2	67.8		36.6	60.0	42.0	61.6	62.3	57.2	65.7	66.9	30.9		59.5	61.3	66.2	55.3		45.5	
ANY HVAC CONTROLS OR HVAC CONTROLS AND	15.0	32.7		5.1		8.0	24.7			35.8	33.7	4.0	10.3			36.7			11.8	
NONE/NOT ANSWERED	14.9	33.2		3.6	10.4	5.2	28.4		20.0	44.5	40.0	1.8	9.1			40.1	18.7		11.2	
LOW VOLTAGE WORK	14.4	23.1																		

CII Findings—Statistically Significant Differences Only Q6, Table 36 (Base = 926)

Overall participation in CII work declined significantly in 2026. The percentage of contractors reporting work in at least one category fell from 80.8% in 2024 to 76.9% in 2026, while the percentage reporting no work or not answering increased from 19.2% to 29.6%.

Traditional power and lighting categories experienced statistically significant declines. Traditional Power/Lighting fell from 75.7% to 71.6%, Lighting declined from 70.9% to 66.6%, and Power as a category decreased from 70.0% to 64.9%. Significant declines also occurred in LED lighting, lighting fixtures, lighting controls, ballasts or LED drivers, lamps, daylighting/shading systems, and other lighting applications.

Ancillary and automation-related work also contracted significantly. Ancillary work declined from 76.1% to 71.1%. Significant declines occurred in fire/life safety, industrial controls, building automation systems, and sound and video work.

Some types of Power quality applications weakened significantly with significant declines also occurring in Backup Power/UPS, Energy Management/Power Quality and TVSS/lightning surge suppression.

Sustainability work experienced broad-based, statistically significant declines. Sustainability projects fell from 51.7% to 44.9%. Significant declines were recorded particularly in LEED and energy-efficiency projects, energy audits, and smart or net metering.

Communications and connectivity work was comparatively resilient but still posted several significant declines. Networking, fiber optics and data center work all declined significantly, while structured wiring/cabling remained essentially unchanged.

High-voltage work contracted significantly. Overall high-voltage work declined from 19.7% to 14.6%, with significant declines in distribution and substations.

Other specialty areas also softened significantly. Maintenance/service/repair work declined from 55.8% to 50.2%, water and wastewater treatment work decreased from 17.0% to 15.0%, and pre-assembly/prefabrication of electrical components fell from 20.7% to 14.9%.

Types of CII Work Performed by Company in 2025 vs. 2023 [Q6, Table 36]							
Base Answering	(926)		(828)	Base Answering	(926)		(828)
COMMUNICATIONS	2025		2023	TRADITIONAL	2025		2023
SYSTEMS/CONNECTIVITY	44		46	POWER/LIGHTING	72	<	76
Structured Wiring/Cabling	37		37	Lighting	67	<	71
Networking VoIP/Wireless/ Broadband, etc.)	25	<	29	LED Lighting (Including Lamps, Fixtures and Controls)	60	<	66
Data Centers	17	<	21	Lighting Fixtures	58		62
Fiber Optics Comm and Security)	22		24	Ballasts or LED Drivers	46	<	58
				Lamps	41	<	50
				Lighting Controls	49	<	55
SUSTAINABILITY	2025		2023	Daylighting/Shading Systems	19	<	25
	45	<	52	Any Other Lighting Not Included Above	17	<	24
Energy Efficiency Projects/ Upgrades (non-LEED)	26	<	32	Power	65	<	70
LEED Projects	18	<	22	Wire and Cable	60	<	65
Energy Audits (including Thermal Imaging)	12	<	17	Power	58	<	64
Solar/Photovoltaics	14		15				
EV Charging Equipment	27		28	AUTOMATION/CONTROL	2025		2023
Smart or Net Metering	11	<	14	SYSTEMS	56		59
Cogeneration	7		7	Fire/Life Safety (including Alarms/Detectors)	36	<	40
Energy Storage Systems	9		9	Industrial Controls (incl PLCS and VFDS, Switchgear)	34	<	39
Wind Generation	3		3	HVAC Controls	25		27
Geothermal	2		30	Security: CCTV/Access/Motion, etc.	29		32
Fuel Cells	3		2	Building Automation Systems/Facilities Connectivity	25	<	28
Smart Grid Technology	4		5	Sound and Video or VDV	16	<	19
Microgrids	3		3	Programming and Commissioning	21		22
				Home Automation/Smart Home/Connectivity	N/A		
POWER QUALITY	2025		2023	Home Theater/Sound or VDV	N/A		
	52		55				
Backup Power/UPS	37	<	43	OTHER	2025		2023
Trouble Shooting/Maintenance of Low-voltage Systems	32		35		55	<	60
TVSS/Lightning Surge Suppression	27	<	34	Maintenance/Service/Repair (Any Electrical)	50	<	56
Energy Management/Power Quality	20	<	23	Pre-Assembly/Prefabrication of Electrical Components	15	<	21
				HVAC (Mechanical)	14		14
HIGH-VOLTAGE	2025		2023	Water Utilities or Waste-water Treatment Plants	15		17
	15	<	20				
Distribution	12	<	17	LOW-VOLTAGE WORK	2025		2023
Substations	8	<	11		72	<	76
Transmission	5		6				

On the previous page, the symbols (+) and (-) indicate significant differences at the 90% level of confidence versus the 2024 profile (each reporting on the previous year) Profile Study (each reporting on the previous year).

Low-Voltage: Firms' Active Engagement in Systems Integration or Data Centers

More than one-half of electrical contractor firms are actively involved in low-voltage work, with low-voltage systems integration being mentioned most often. There are no statistically significant changes compared with two years ago.

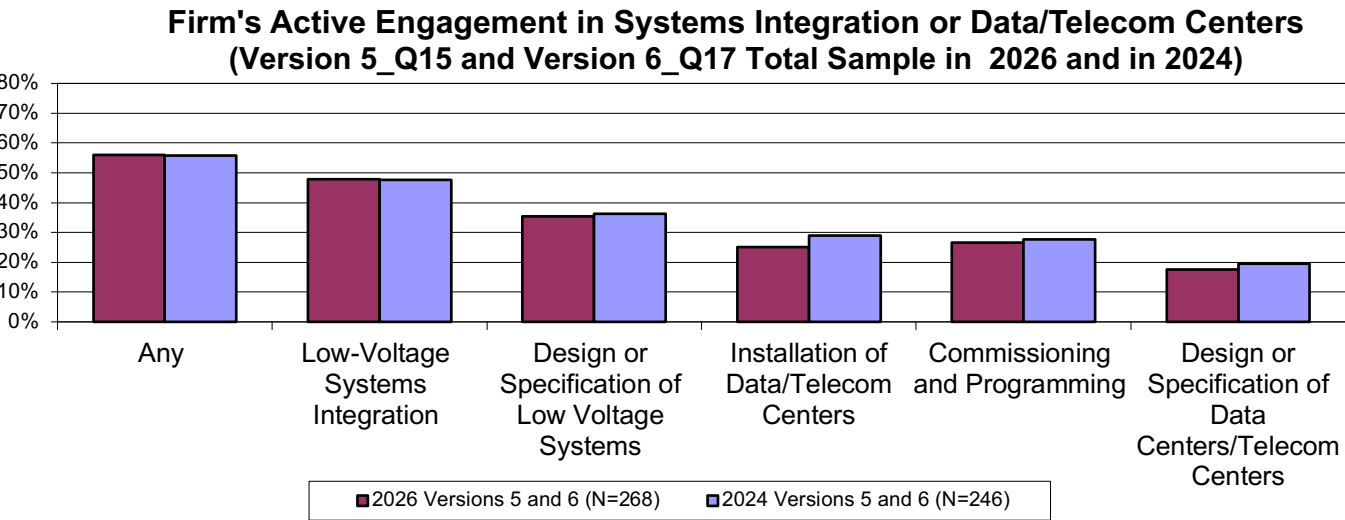


Table 257

Roles Played by Firm in Integrated Systems

Electrical contractors were asked to indicate the extent to which they specify, install or both specify **and** install selected integrated systems.

Mirroring the findings from two years ago:

- 6 in 10 electrical contractors say that they both **specify and install** Lighting. As has been the case historically, this is about double the percent that *only* install.
- For most of the other integrated systems, the percentages that both specify **and** install is in the range of about 11% to 22%. Note that HVAC (not including controls) posted a significant increase from 5% to 11%. Specifying without installing is in the single digits for all categories.
- Differences from two years ago: Although at a low level, fewer now only specify Security systems. The percent that both specify and install HVAC (not including controls) doubled from two years ago.

Roles Played by Firm in Integrated Systems 2026 Profile Study				
	Specify <i>Only</i>	Install <i>Only</i>	Specify <i>and</i> Install	Don't Work in This Category
Version 7 Q17 Base (170)	%	%	%	%
Security	4>1[2024]	32	18	46
Fire/Life Safety	5	35	21	38
Lighting (Including Controls)	1	29	58	11
Communications (VDV, etc.)	3	37	19	41
Building Controls (Including HVAC)	2	35	22	41
HVAC (Not Including Controls)	1	22	11>5[2024]	65

Tables 201 - 210

> or < indicates significant difference from 2024 results; only significant differences are shown

▲ “WHERE” DO CONTRACTORS PERFORM THE WORK?

Number of States

As has been the case at least since 2024, about four in ten electrical contracting firms perform their work in multiple states. As noted in the past, issues of licensing and certification may suppress working in multiple states. The proportion of electrical contracting firms working in 2 or more, 3 or more, 4 or more and 5 or more states are each statistically unchanged from 2024.

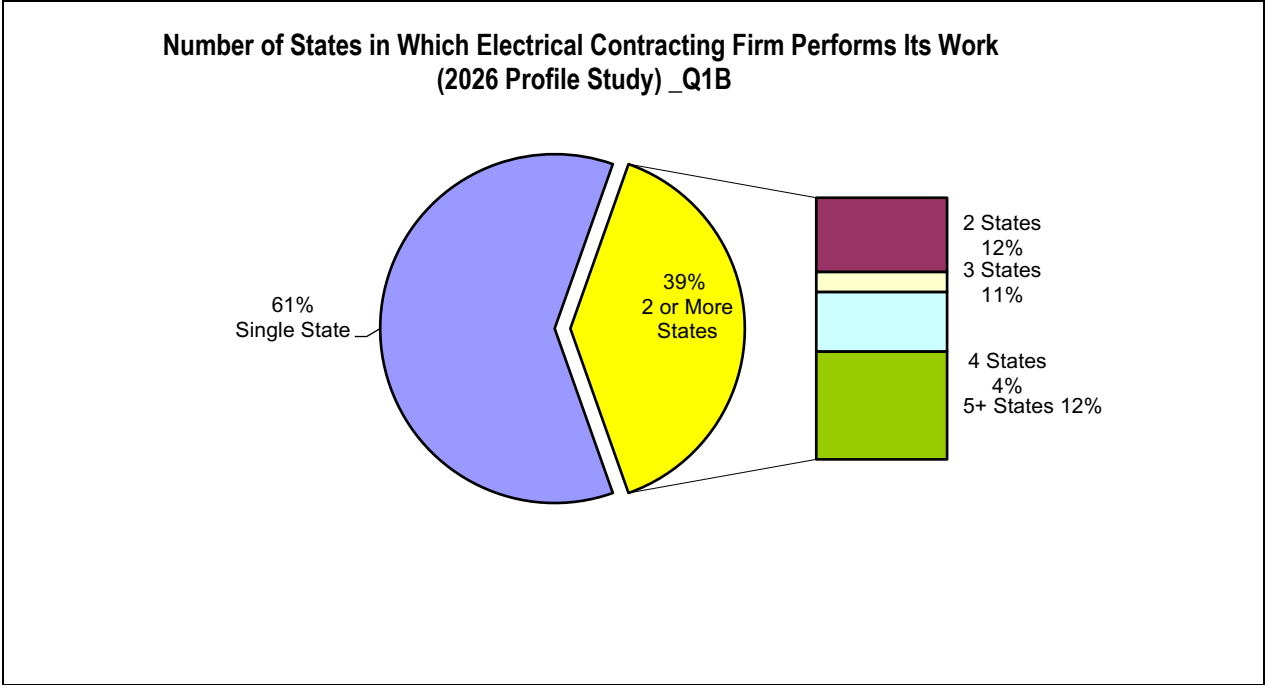


Table 3

Not surprisingly, larger firms are more likely to work in multiple states. This was also the case in earlier Profile studies.

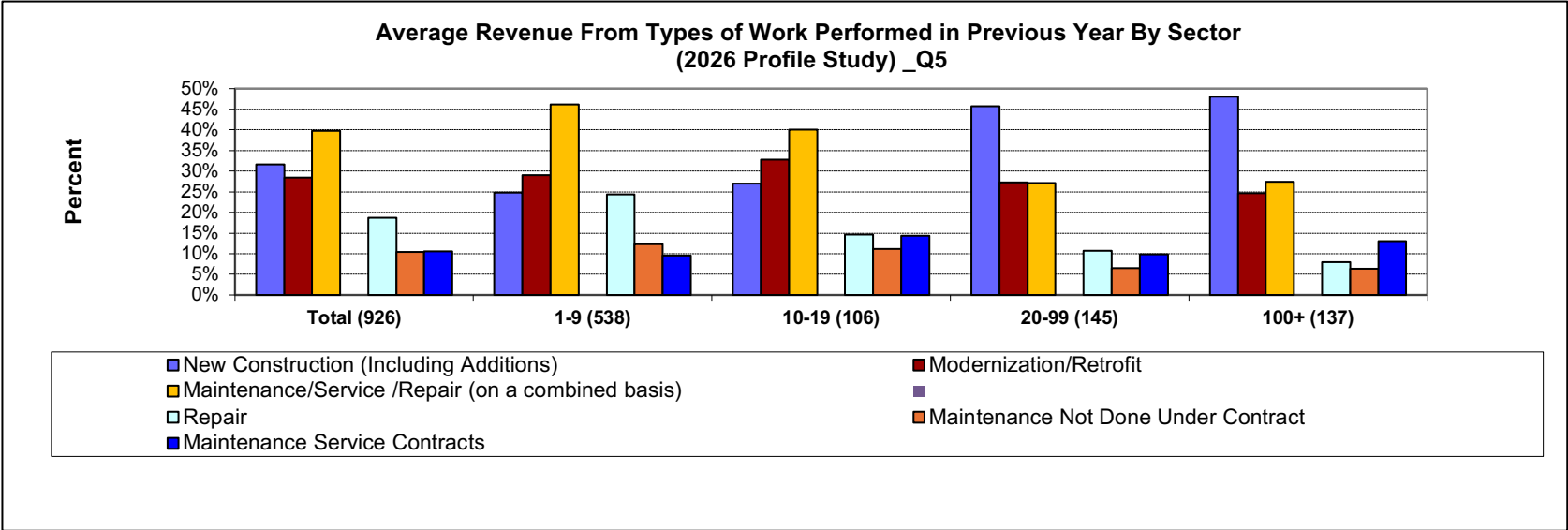
Number of States in Which Electrical Contracting Firm Performs Its Work— Trended					
	Total	1-4	5-9	1-9	10+
Work in 2+ states	39%	27%	34%	28%	<54%
Work in 2+ states (2024)	39%	20%	< 29%	22%	< 56%
Work in 2+ states (2022)	40%	26%	< 33%	27%	< 57%
Work in 2+ States (2020)	36%	24%	< 34%	26%	< 56%
Work in 2+ States (2018)	33%	21%	< 35%	24%	< 55%
Work in 2+ States (2016)	32%	22%	<30%	24%	< 54%
Work in 2+ States (2014)	31%	20%	< 37%	23%	< 55%
Bold percentages are significantly higher than <i>italicized</i> percentages in the direction of the arrow					

Table 3

Types of Work: By Sector (New Construction vs. Modernization vs. Maintenance and Repair)

Maintenance/Service/Repair (MSR) now accounts for more revenue than does New Construction, which has fallen to second place among the total sample. Note the relative importance of MSR to small firms and the relative importance of New Construction to the largest firms.

Table 32



The proportion of revenue from New construction declined compared with two years ago, while the proportion from Maintenance/Service and Repair increased, possibly in compensation. Two years ago, the two sectors were essentially tied.

- Among smaller firms, New construction fell significantly, while Maintenance contracts rose.
- Repair posted a small, but significant increase among larger firms.

The decline in overall revenue and corresponding decrease in mean revenue from CII is consistent with the lower mean revenue from New Construction and a corresponding increase in the average percentage revenue from Maintenance/Service/Repair.

Average Percent of Sales/Revenue from Specific Sectors (Q5)						
	Total		1-9 Employees		10+ Employees	
	2026	2024	2026	2024	2026	2024
New Construction	31.7%	<36.6%	24.8%	<30.3%	41.4%	43.3%
Modernization/Retrofit	28.5%	27.7%	29.0%	27%	27.8%	28.3%
Maintenance/Service/Repair	39.7%>	35.7%	46.2%	42.7%	30.8%	28.4%
Repair	18.7%>	15.4%	24.4%	21.8%	10.9%>	8.8%
Maintenance/Service Contracts	10.6%>	9.1%	9.5%>	6.7%	12.2%	11.7%
Maintenance Not Done Under Contract	10.4%	11.2%	12.3%	14.2%	7.7%	8%

Table 32

Bold percentages are statistically higher than *italicized* percentages in the direction of the arrow

Lighting and Electric Power Transmission and Distribution continue to account for the largest sources of revenue, followed distantly by Industrial Systems. Note the sharp drop in the percent of revenue from Electric Power and Distribution in 2016 and the related rise in revenue from Lighting in 2018 when Lighting edged into the top position. We posited then that these findings meant that the industry was going toward more value-added offerings. The decline in backup systems may be because of the addition of power gen sets in 2026.

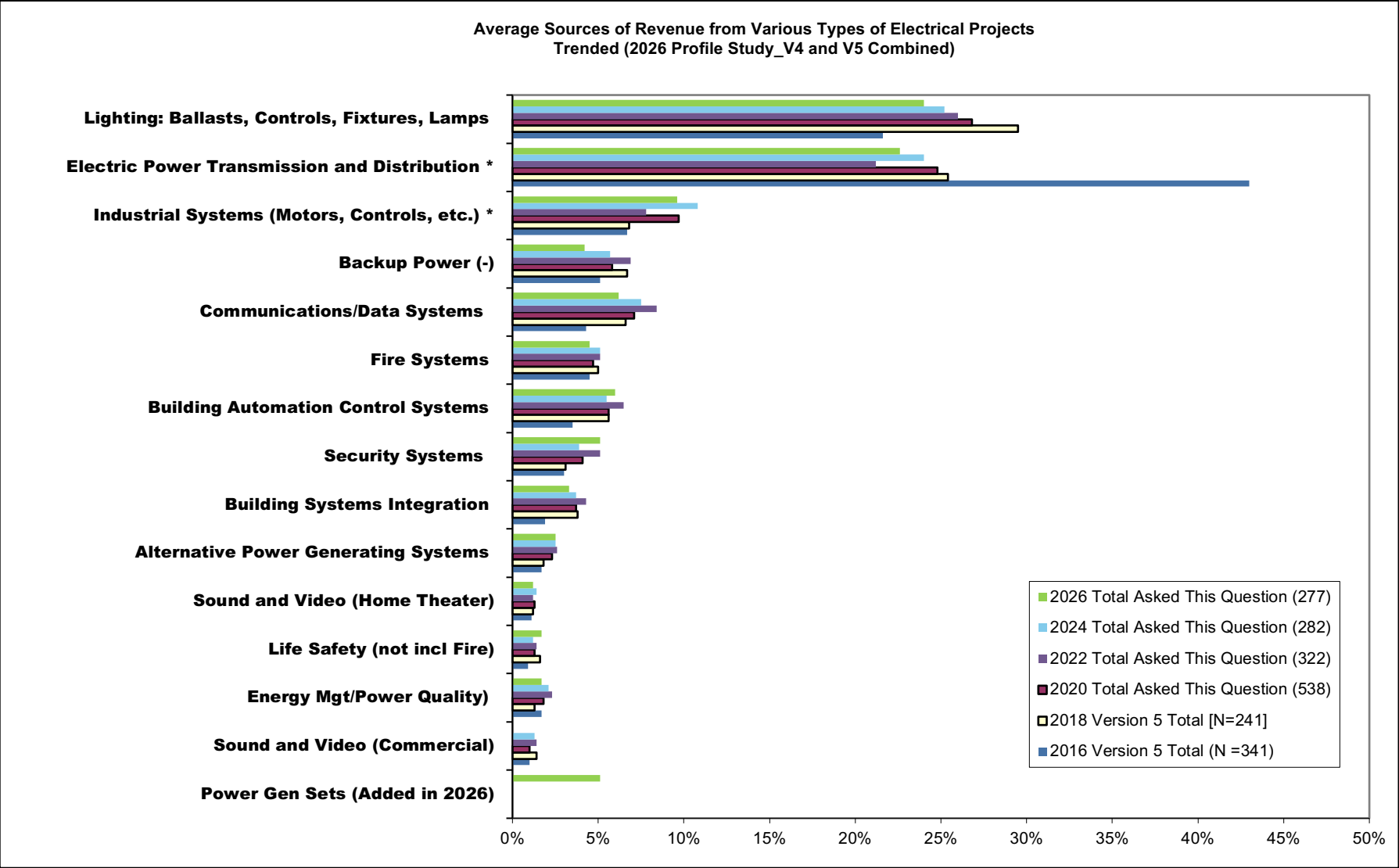


Table 255

Here are the same data by company size.

Note that the broad categories of Lighting and Electrical Power Transmission play a relatively lower role in larger firms compared with smaller firms, but that industrial controls plays a much larger role in larger firms.

Please see the legend for the few subgroup differences that emerged (indicated by *).

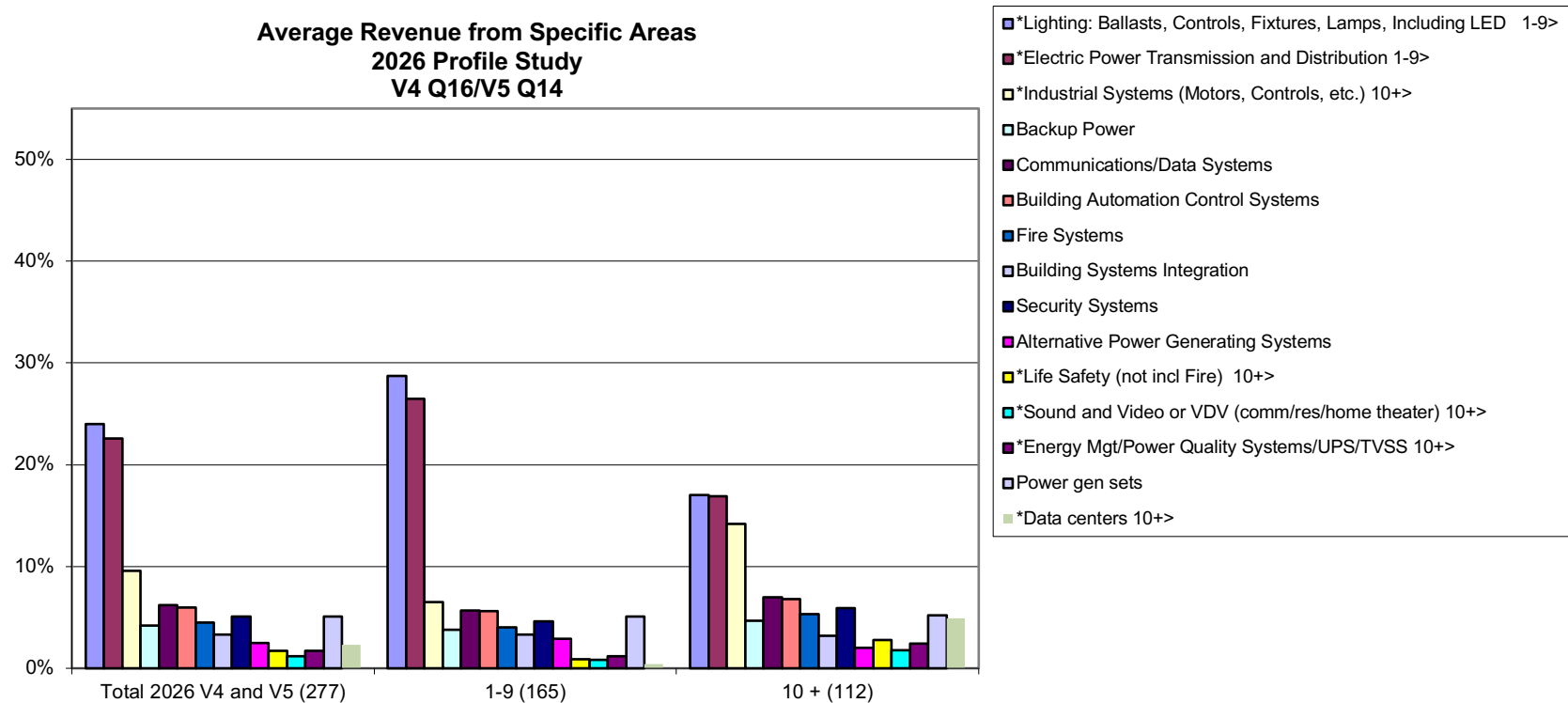


Table 255

Work in Various Building Categories (Residential vs. CII vs. Nonbuilding)

Across the total sample, electrical contractors continue to get more of their average revenue from CII (Commercial, Industrial, Institutional) and Public Access, 48.5% on average, than from Residential projects, 39.1%. Nonbuilding projects (Transmission/Lighting and Utility) account for about 12.5% of revenue on average, 22.8% among firms with 100+ employees.

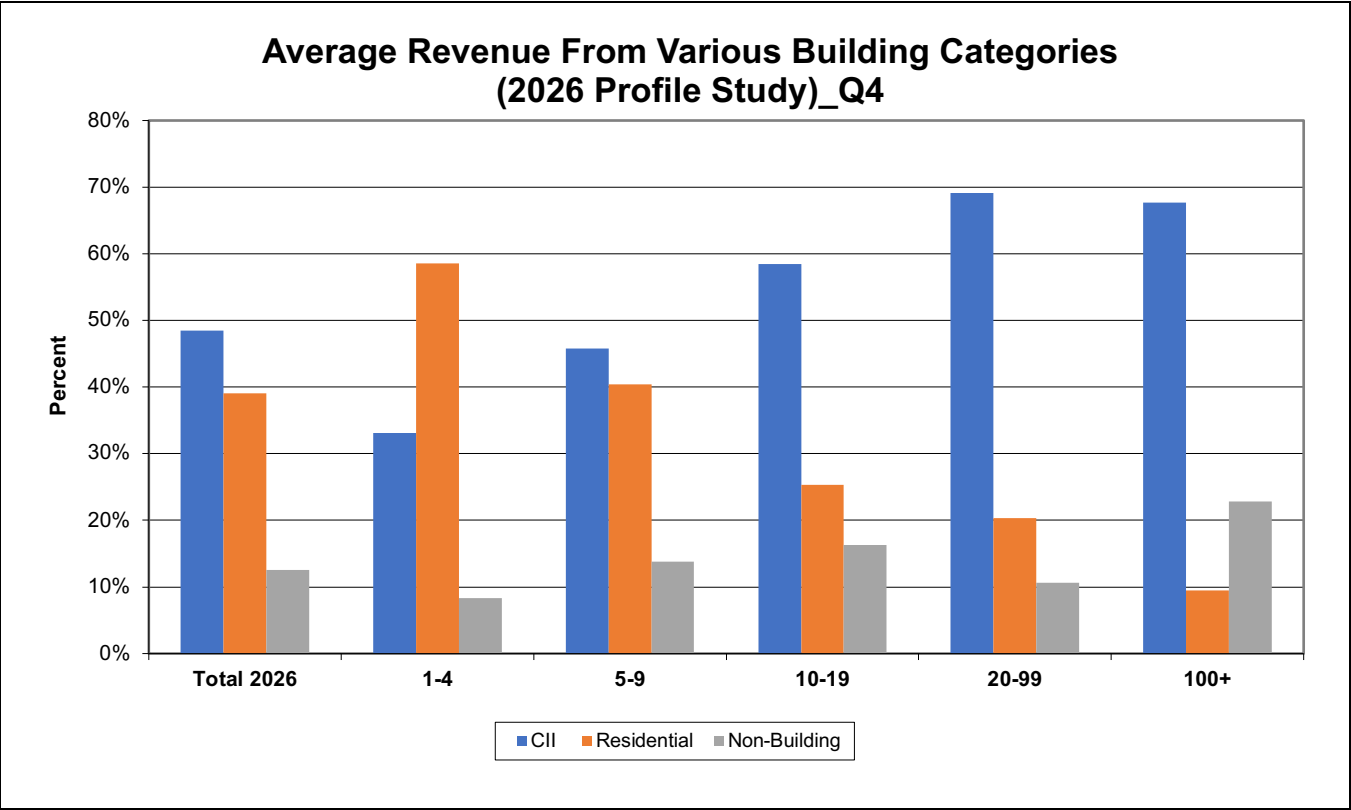


Table 23

Average Revenue in Previous Year from Specific Categories (Q4)

Ω	TOTAL		1-9		10+		10-19		20-99		100+	
	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024	2026	2024
	(926)	(828)	(538)	(418)	(388)	(407)	(106)	(100)	(145)	(165)	(137)	(142)
	%	%	%	%	%	%	%	%	%	%	%	%
TOTAL C/I/I	48.5	<54.8	36.1	<41.3	65.7	68.5	58.5	62.3	69.1	71.3	67.7	69.5
TOTAL RESIDENTIAL	39.1>	35.4	54.4	53.4	17.8	17.1	25.3	26.5	20.3	18.0	9.5	9.4
TOTAL NONBUILDING	12.5>	9.8	9.6>	5.3	16.5	14.4	16.3	11.2	10.6	10.7	22.8	21.1

Table 23

On average, electrical contractors continue to get more of their revenue from CII projects (48.5%) than from residential work (39.1%). Nonbuilding accounts for 12.5%.

The proportion from CII projects is significantly down compared with two years ago, while the proportion from residential and Nonbuilding are both up. Nonbuilding might have increased because we added power gen sets in 2026, resulting in additional revenue

- The decline in CII construction revenue is due to less specifically commercial work rather than declines in Industrial or Institutional projects. The increase in residential revenue is tied to single-family housing (33.4% up from 29%) (Not Shown).

Within the broad CII category, commercial projects at 24.6%, accounts for more revenue than does Industrial (14.8%) or Institutional (9.2%) projects.

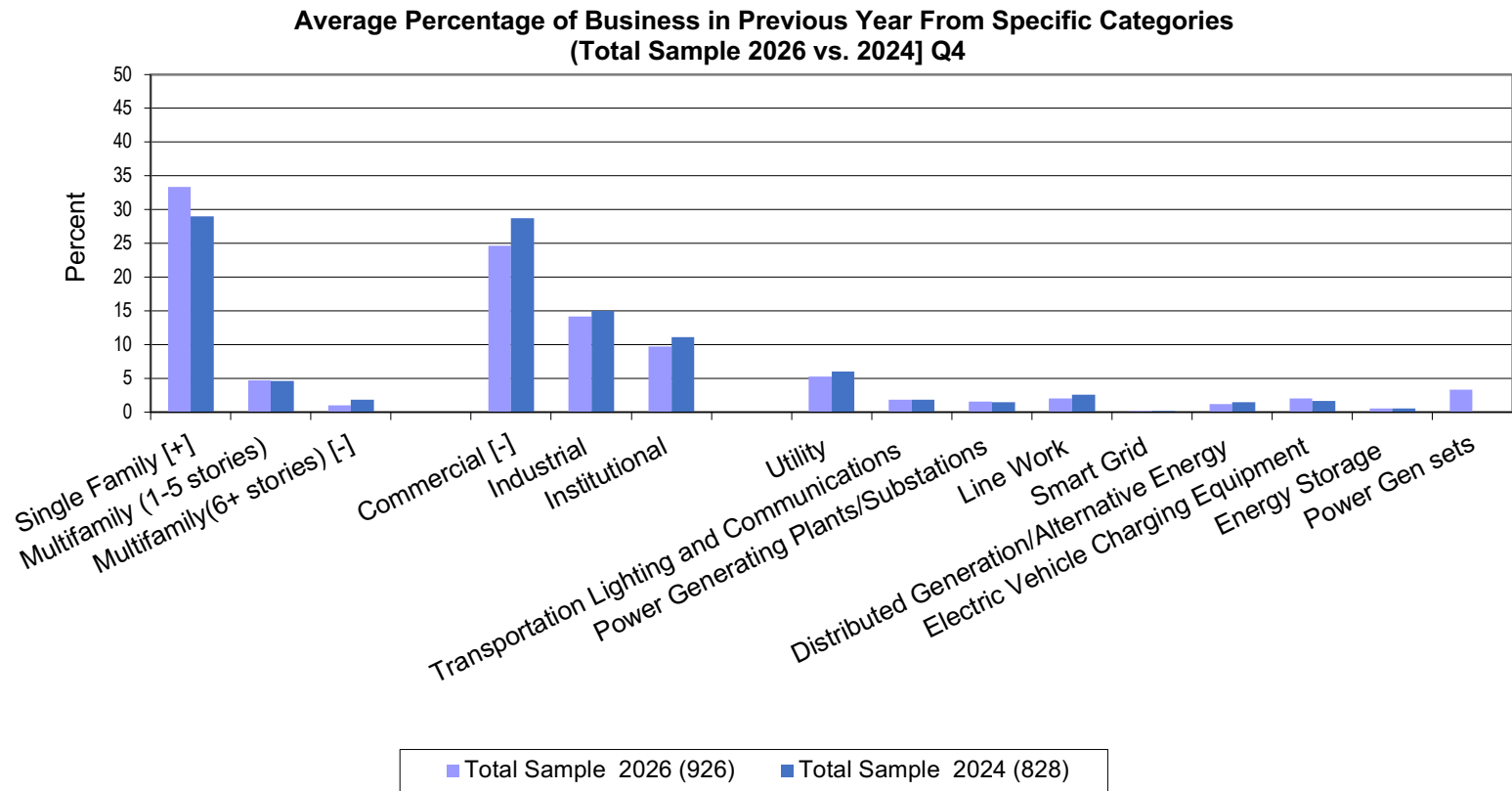


Table 23
+/- next to the data labels indicate statistically significant differences from 2024 among the total sample

This chart shows the breakout by company size. Single-family housing plays a relatively larger role to the smaller firms.

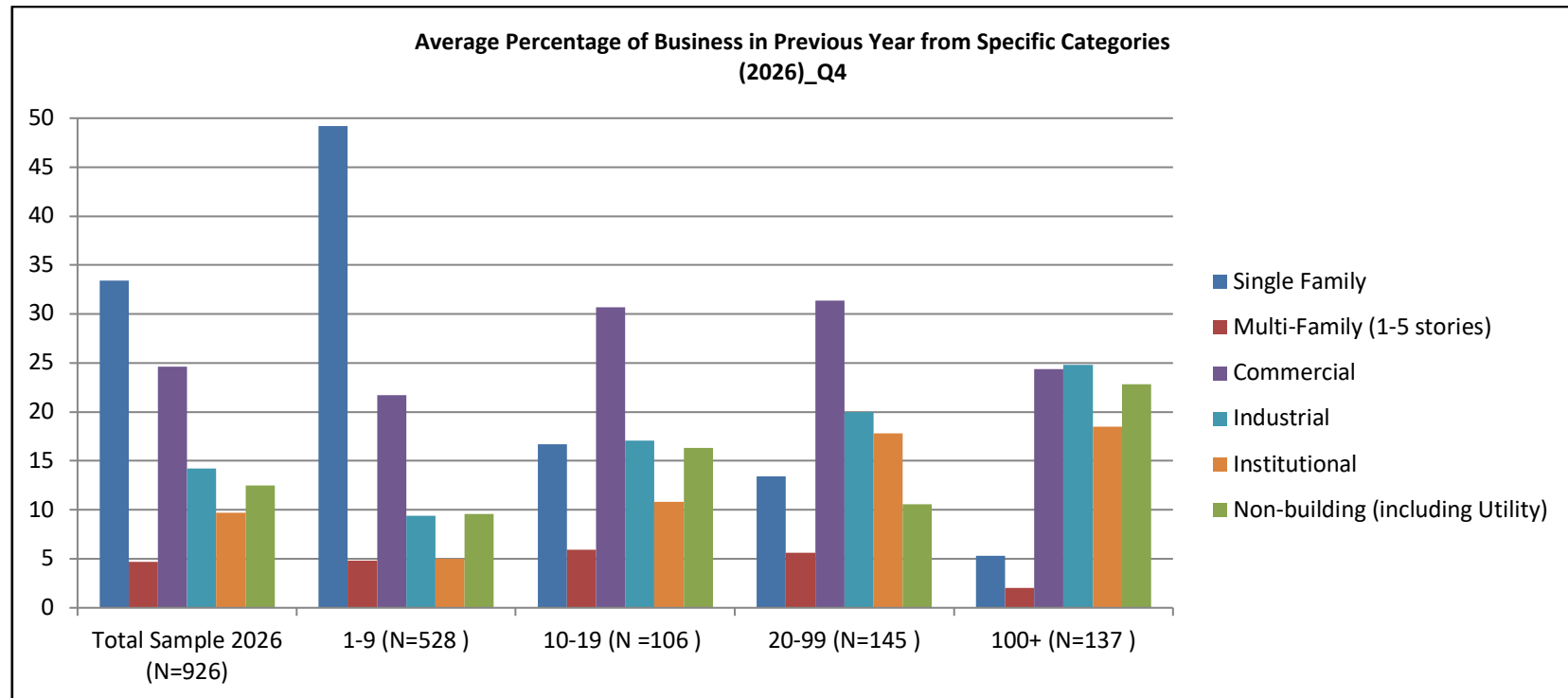


Table 23

▲ "HOW" DO CONTRACTORS PERFORM THEIR WORK?

Compared with two and four years ago, the way that electrical contractors bid jobs is remarkably consistent: Time and Materials, and Maintenance, Service and Repair—both added in the 2020 Profile Study, based on their high number of volunteered mentions in 2018—were once again mentioned most often on an “any” bid basis.

Design-Build lost ground as did Maintenance/Service/Repair, which is somewhat surprising. Construction management, first asked in 2026, posted a respectable result of 15% of any bids, perhaps competing with Design-Build?

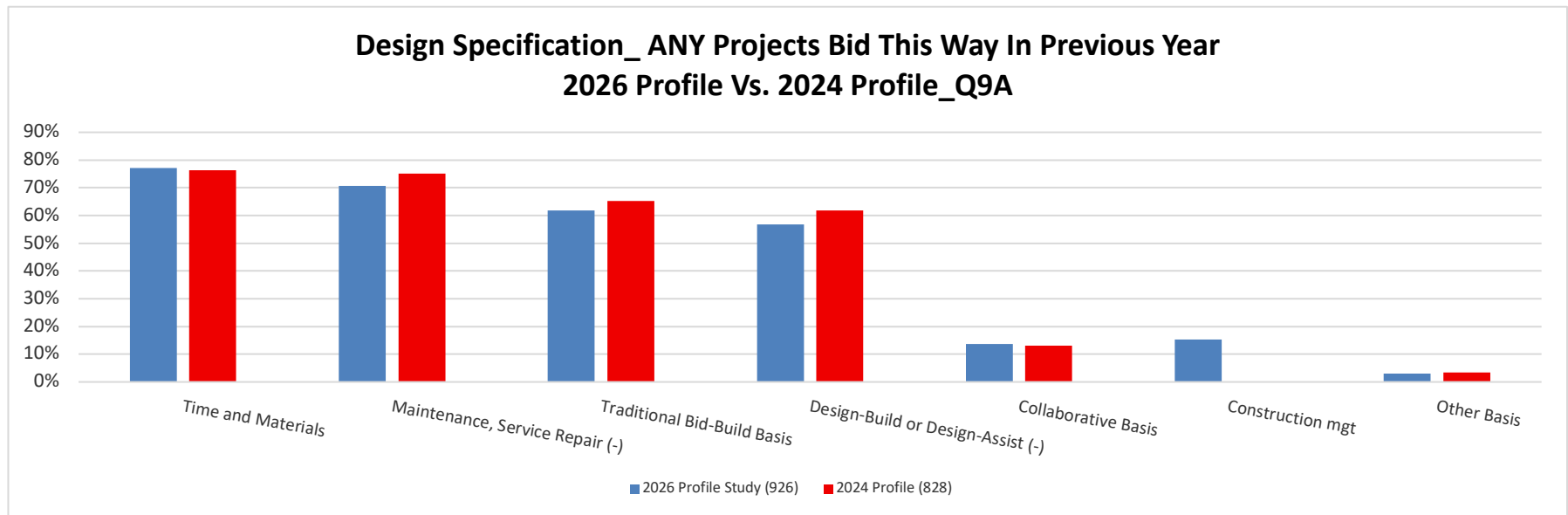


Table 54

(-) and (+) indicate statistically significant differences from the 2024 Profile Study

The chart on the previous page shows whether the electrical contractor does *any* work on this basis. The next few pages focus on the *amount* of work done, expressed as average revenue.

As shown below, on average, the top design specifications are Time and Materials (27%) and Traditional Bid/Build (27%); Design-Build or Design-Assist is somewhat lower at 22% and posted a significant decline compared with two years earlier. Maintenance, Service, and Repair (on a combined basis) accounts for an average of 19%. Only about 2% of projects were bid on a Collaborative basis or as Construction management or on some “Other” basis in 2025.

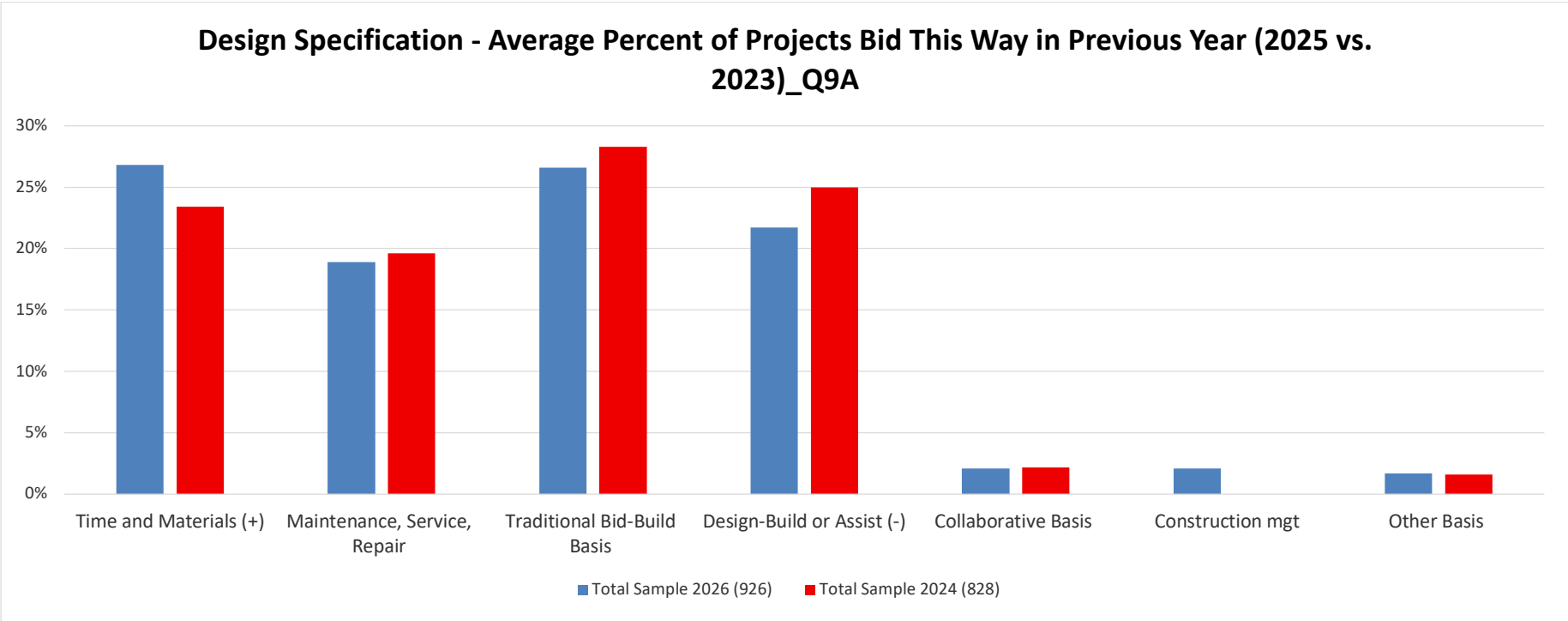


Table 53

Construction management not asked in 2024

(-) and (+) indicate statistically significant differences from the 2024 Profile Study

Design Specification - Average Percent of Projects Bid This Way in 2025								
Table 53, Q9A	Total	1-4	5-9	1-9	10+	10-19	20-99	100+
	%	%	%	%	%	%	%	%
Traditional Bid-Build	26.6	<i>17.1</i>	31.5	<i>20.5</i>	35.1		39.5	36.3
Design-Build or Design-Assist	21.7	<i>15.6</i>		<i>17.6</i>	27.4		28.7	29.0
Time and Materials	26.8	38.8		35.5	<i>14.9</i>	<i>21.3</i>	<i>12.8</i>	<i>12.1</i>
Maintenance, Service and Repair	18.9	24.3	<i>15.8</i>	22.3	<i>14.0</i>		<i>12.8</i>	<i>10.6</i>
Collaborative Basis	2.1	<i>1.2</i>		<i>1.3</i>	3.2			5.3
Construction Management	2.1	<i>1.2</i>		<i>1.4</i>	3.3			3.9

Empty cells are not significantly different from the total sample

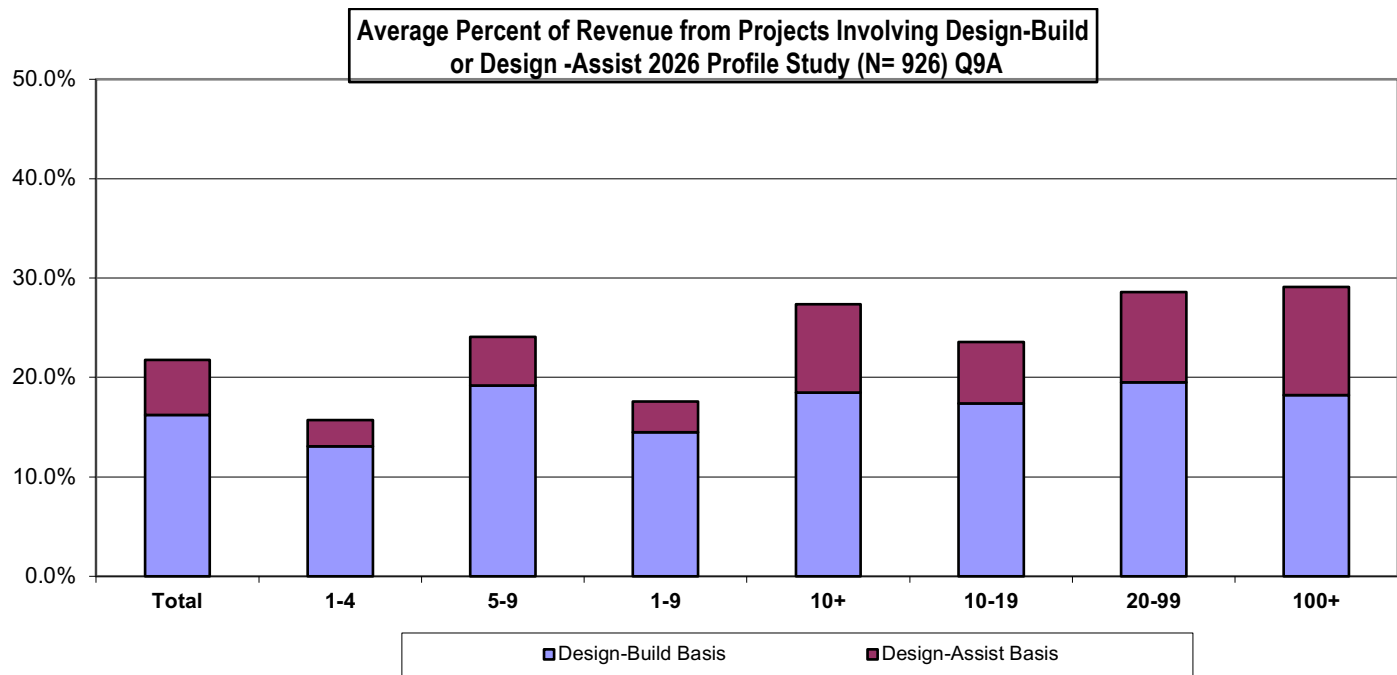
Bolded cells indicate significantly higher than the total

Italicized cells indicate significantly lower than the total

When looking at the percentage of companies’ 2025 electrical projects (in dollar volume) that are Design-Assist or Design-Build, overall Design-Build is higher. Design-Assist accounts for more revenue among larger firms.

Note the relative importance of Design-Assist in the 2026 Profile Study among firms with 100+ employees. This was also the case in the 2018, 2020 2022 and 2024 Profile Studies (not shown).

Note that Design-Assist accounts for more revenue among larger firms.



BIM (Building Information Modeling)

Among the total sample, use of BIM (Building Information Modeling) has statistically declined among the total sample in terms of “any” use and average use since 2024. Both declines were small, but this is the first time that “any” BIM use has declined since 2018. This is also the first year that BIM has declined on average basis. As we’ve noted, use of BIM increases with company size, rising to about 80% “any” use and more than 30% on an average basis among very large firms (both “any” and average BIM usage is statistically unchanged among very large firms compared with two years earlier).

Use of Building Information Modeling (BIM)_Q9B

Any vs. Average Use	Any	Average
Survey Year (Current Use) (2026)	↓31.1	↓10.0
Survey Year (Current Use) (2024)	↑35.8	↑12.1
Survey Year (Current Use) (2022)	↑31.1	9.2
Survey Year (Current Use) (2020)	↑27.2	↑8.2
Survey Year (Current Use) (2018)	22.1	6.5
Survey Year (Current Use) (2016)	22.3	6.0
Survey Year (Current Use) (2014)	23.7	7.1
Survey Year (Current Use) (2012)	20	5.8

Table 55

↑ indicates a statistically significant increase compared with two years earlier
↓ indicates a statistically significant decrease compared with two years earlier

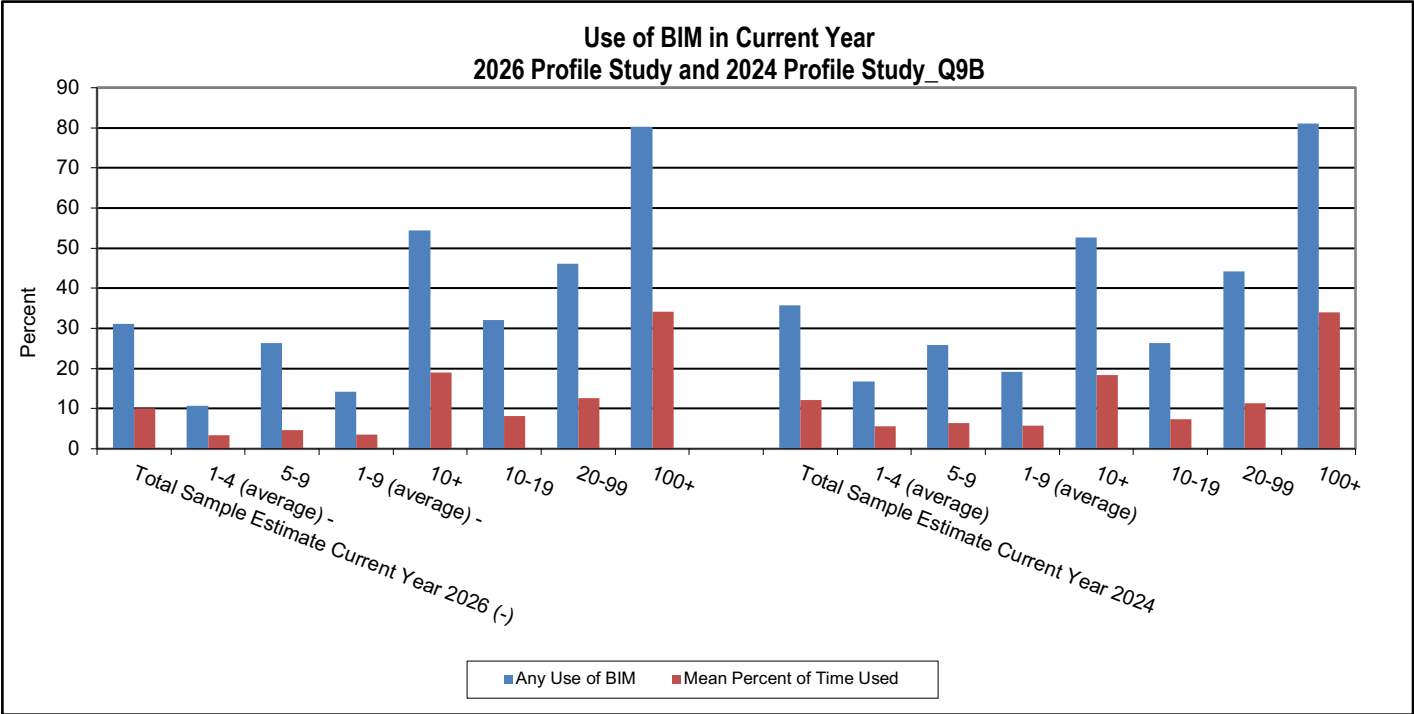


Table 55

(-) and (+) indicate statistically significant differences from the 2024 Profile Study

Completeness and Correctness of Plans and Specifications

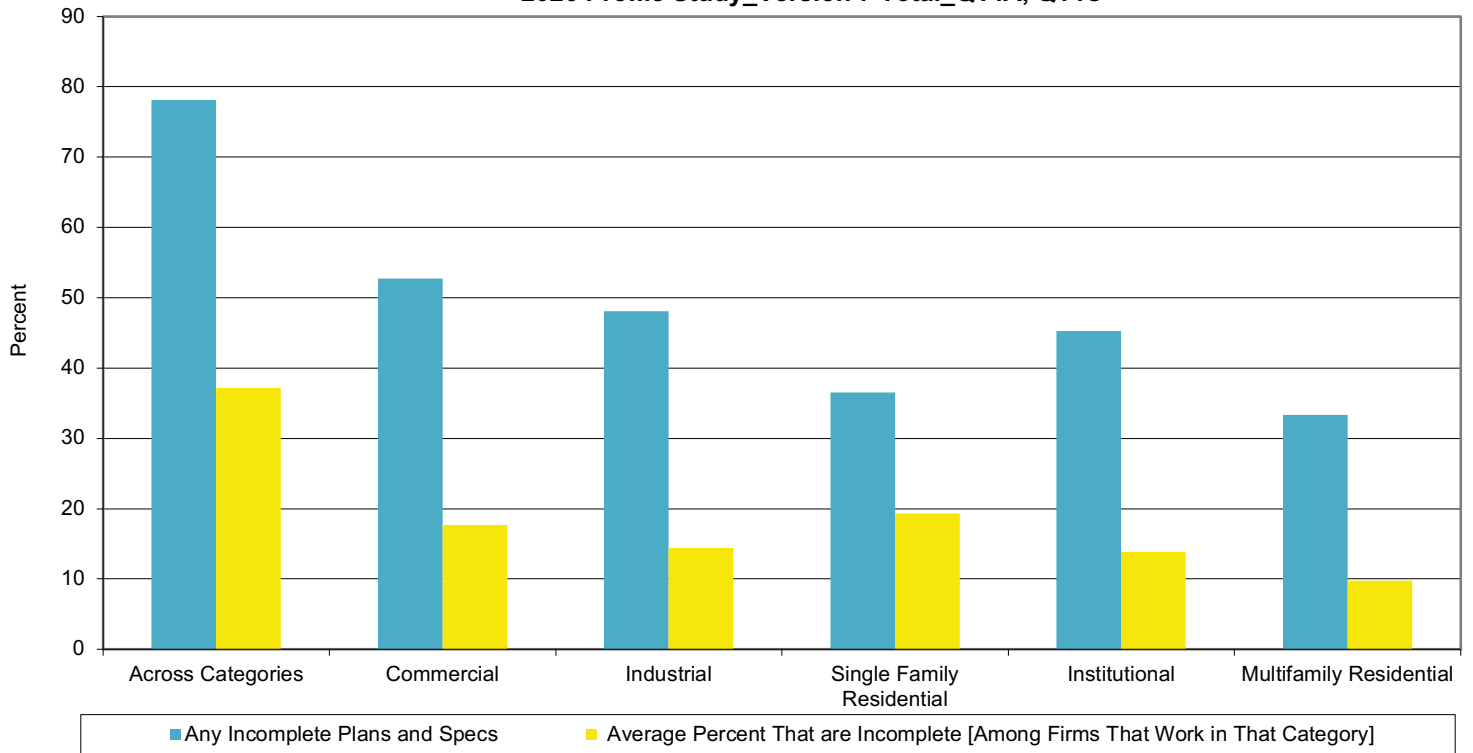
About 8 in 10 electrical contracting firms say that they receive incomplete plans and specs and/or incorrect plans and specs, both of which afford the electrical contractor the opportunity to influence the project and its specifications.

- Both “Any” and mean are statistically unchanged compared to two years ago.

	Completeness and Correctness of Plans and Specs			
Version 7, Q14A and Q14B	ANY		Mean	
	2026	2024	2026	2024
	(190)	(129)	(190)	(129)
Incomplete Plans and Specs	78%	79%	37%	38%
Incorrect Plans and Specs	83%	83%	32%	35%

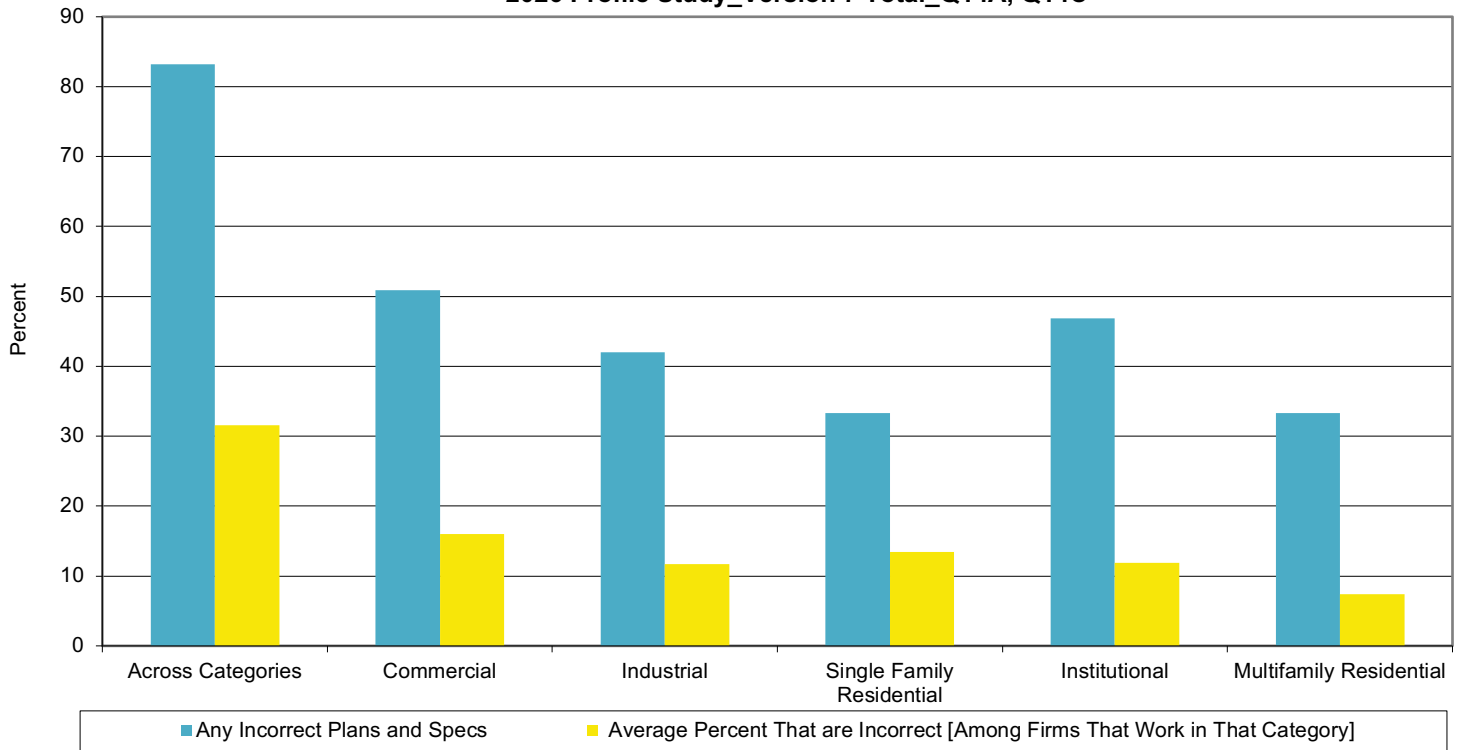
Tables 168, 169

**How Often Firm Receives Plans and Specs That are Incomplete
(Among Firms that Work in that Building Category)
2026 Profile Study_Version 7 Total_Q14A, Q14C**



Tables 168, 180-181

**How Often Firm Receives Plans and Specs That are Incorrect
(Among Firms that Work in that Building Category)
2026 Profile Study_Version 7 Total_Q14A, Q14C**



Tables 169, 192-193

Role of Engineers within Electrical Contracting Firms

Starting with the 2016 Profile Study, electrical contractors were asked about the professional relationship(s) that their firm has with engineers:

- Consulting Relationship, that is, the engineer is *not* on staff
- On staff or in a separate engineering division

These questions were asked independent of each other since we did not want to assume that one type of relationship would rule out the other.

In the current wave, across the total sample, about six in ten firms (59%) have a professional relationship with an engineer, unchanged from the 2024 Profile Study (59%).

- As in the past, among the total sample in 2026, *consulting* relationships continue to be more prevalent (52%, statistically unchanged from the 2024 level of 55%). In addition, 22% report having an engineer on staff and/or having a separate engineering division, which is also statistically unchanged from two years earlier. Over one in ten (15%) have **both** a consulting relationship as well as having an engineer on staff or a separate engineering division. Once again, this is statistically unchanged from the 2024 findings.

As might be expected, the practice of working with engineers is far more common among larger firms. As shown on the next page, larger firms (10+ employees) are significantly more likely than smaller firms (1-9 employees) to work with engineers in each capacity.

- Further, the prevalence rises with firm size. This is especially noticeable among firms with 100+ employees, where the level rises to 90% (not shown). However, even among firms with 1-4 employees, 40% have a professional relationship with an engineer (not shown).³

There are no statistically significant differences among the total sample, firms with 1-9 employees, or firms with 10+ employees compared with the 2024 study.

As we've noted in previous reports, the high prevalence of working with engineers speaks to the complexity of much of the work performed by electrical contractors.

³ For this question, the base sizes for subgroups other than 1-9 and 10+ are small and the findings about these subgroups should be viewed as suggestive.

Professional Relationship With Engineer(s)—Trended w/ Subgroups							
	2026 Profile Study			2026 Profile Study	2024 Profile Study	2026 Profile Study	2024 Profile Study
	TOTAL	1-9	10+	1-9	1-9	10+	10+
	(174)	(78)	(59)	(78)	(69)	(59)	(64)
	%	%	%	%	%	%	%
Any Professional Relationship	59	46	< 80	46	40	80	80
Consulting (Not on staff)	52	41	< 68	41	37	68	75
On staff/separate division	22	9	< 34	9	10	34	42
Both	15	4	< 22	4	8	22	< 37

Table 194

Bold and *italicized* percentages are significantly higher than the total
Arrows indicate significant differences between pairs.

Project Collaboration/Level of Influence

Similar to recent Profile Studies, in the current wave almost 8 in 10 electrical contractors (79%) continue to report having a “high” or “medium” ability to influence the overall electrical design or specifications with building owners and/or design team members.

- About one-third (34%) describe their level of influence as “high” while just over four in ten contractors (44%) characterize their level of influence as “medium.”
- There are two statistical differences by company size. More smaller firms (1-9 employees) describe their level of influence as “high” compared to larger firms (10+ employees) (44% vs. 25%). Conversely, more larger firms describe their level of influence as “low” compared to smaller firms (19% vs. 8%). (Not shown.)
 - Among firms with 10+ employees, statistically fewer electrical contractors in 2026 than in 2024 reported their level of influence was “high” (25% vs. 44%) [Not shown].

**Ability to Influence Overall Design or Specifications With Building Owner and/or Design Team--
2026 Profile StudyVersion 7 Total Sample (N=174)**

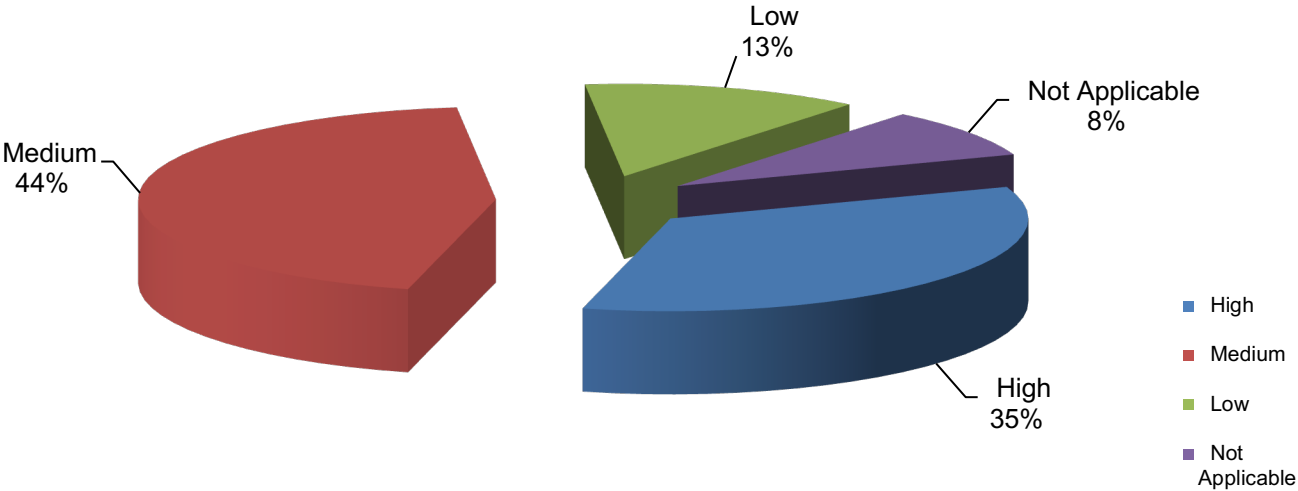


Table 195

Brand Specification Options

Respondents were shown a list of four options and asked what percentage of specifications that their company receives falls into each category. On average, a “single” or proprietary brand and multiple brands are both specified one-third of the time (34% each). “Or equal to” (20%) and performance-specified (12%) are specified lower.

- There was one statistically significant difference within the subgroups. A “single” or proprietary brand is specified significantly more often by smaller firms (1-9 employees) than by larger firms (10+ employees) (39% vs. 28%).
- There was only one statistically significant difference among total compared with two years earlier. “Or equal to” was specified statistically more often in 2024 than 2026 (28% vs. 20%) (not shown).

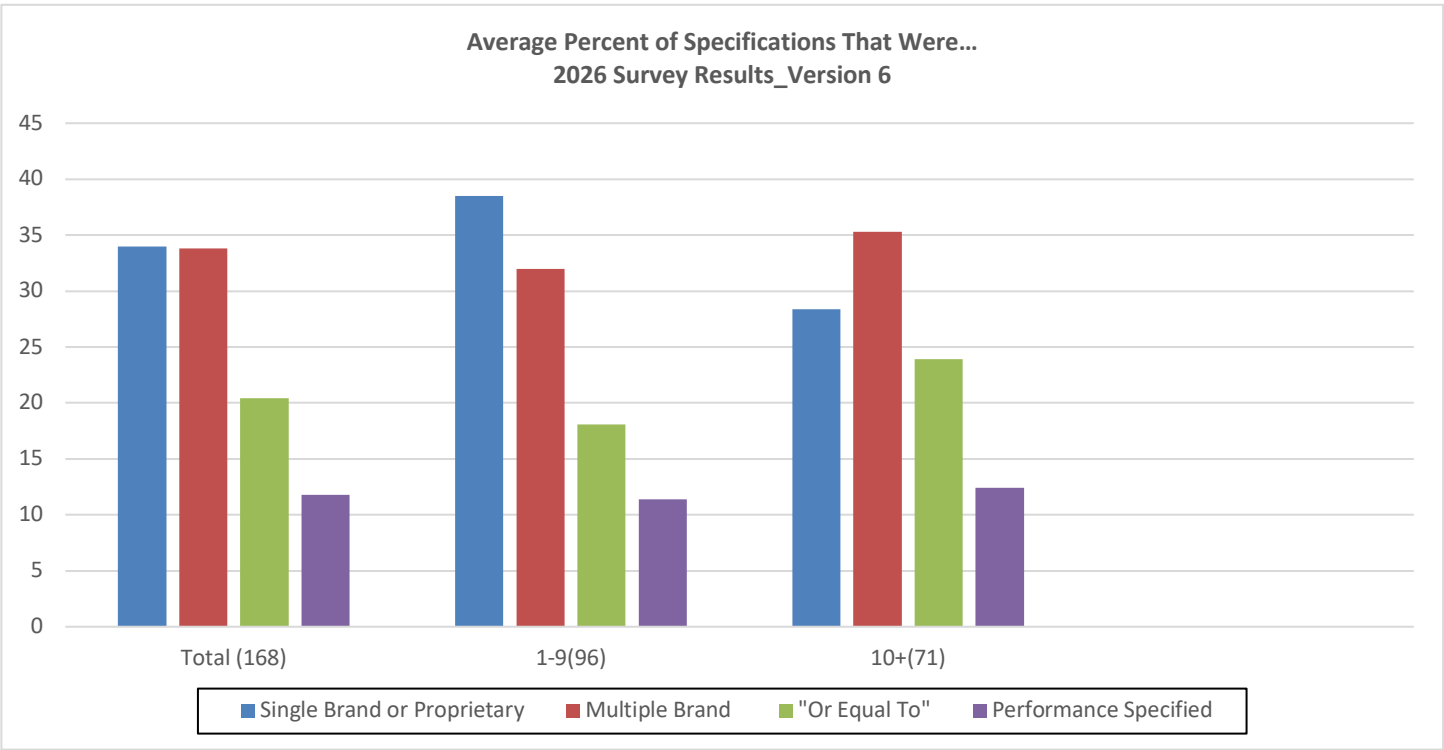
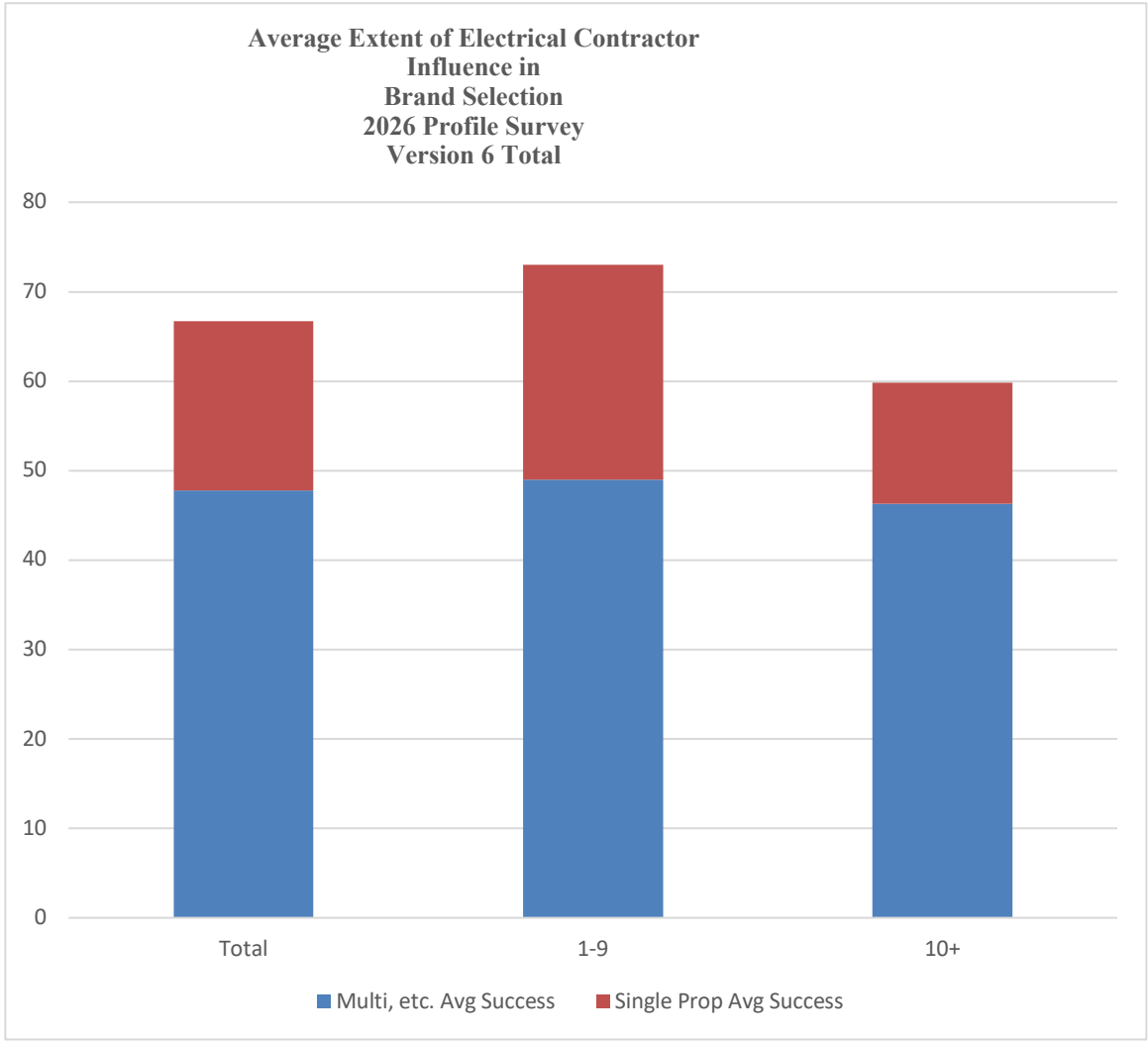


Table 152

Respondents were then asked how much discretion they have in making a brand selection. Overall, contractors are able to make the brand selection 67% of the time; 73% for firms with 1-9 employees and 60% for firms with 10+ employees.

- These percentages are consistent with what was reported in 2024.



Tables 152,154, 160

“Where a ‘single or proprietary’ specification is indicated, what percentage of the time are you or someone in your firm able to successfully make a substitution?”

“Where ‘multiple or equal or performance’ specification is indicated, what percentage of the time do you or someone in your firm make the brand decision for installation?”

Main Reasons for Original Brand Selection and Substitution

Original Brand Selection:

Among the total sample, Availability and Price surpass all other attributes as a top-3 reason for original brand selection. Note that as a first choice, Availability completely overshadows all other attributes (this has been the case since at least the 2014 Profile Study).

Compatibility with Existing Systems, which was first asked in 2014, has resonance with 42% of electrical contractors. Prior Experience, Durability, Manufacturer Reputation and Specific Features form the next tier. Each score between 25% and 14% on a top-3 reason basis.

The following attributes score 11% or less on the top-3 reason basis: Made in America, Ease of Installation, Manufacturer Support and Training, Energy Efficiency, Compliant with Build American/Buy America Certification (first asked in current wave), Real-Time Technical Support, Tariff Costs (first asked in current wave) and Word-of-mouth.

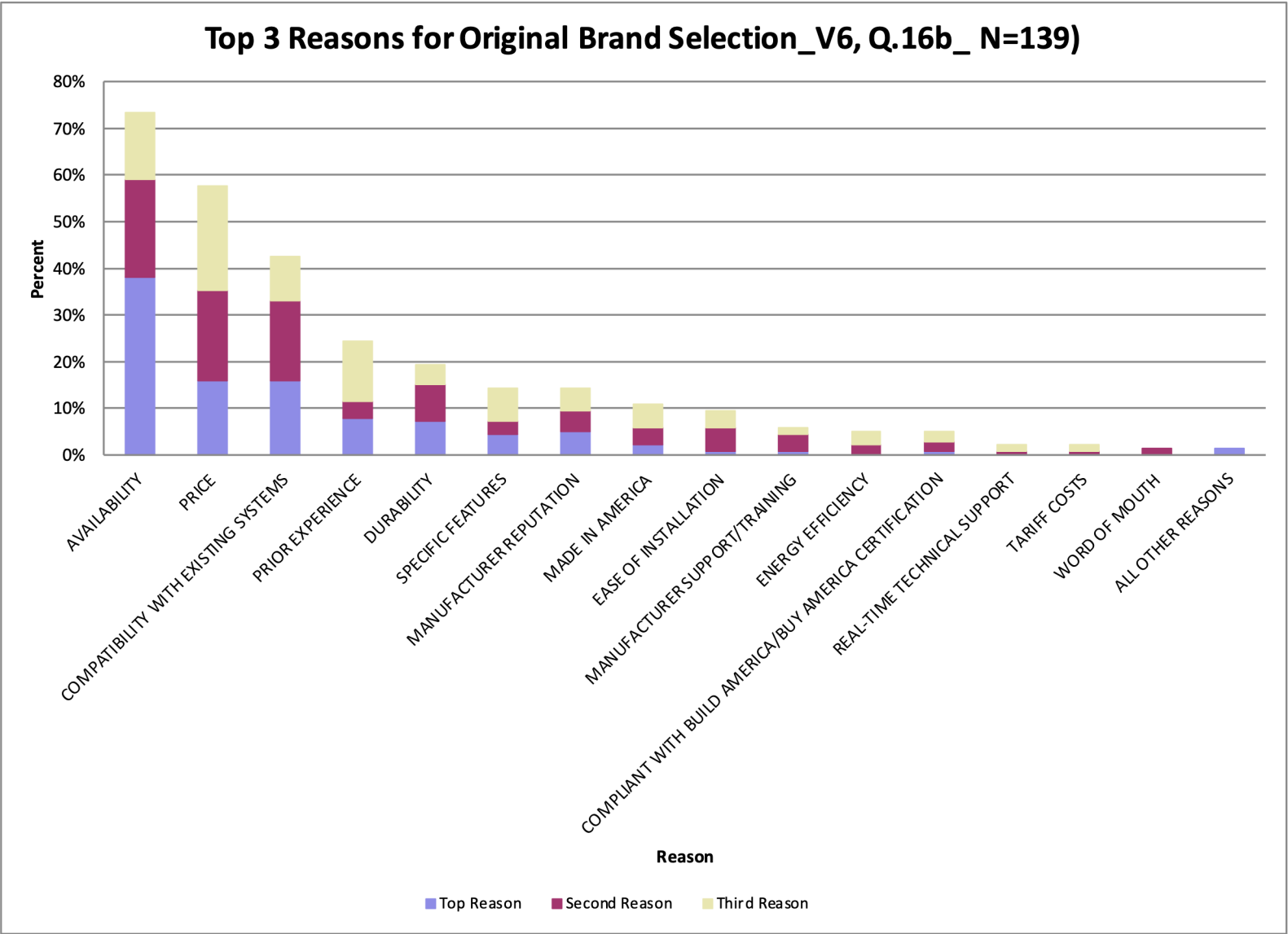


Table 161 - 163

Top 3 Reasons for Original Brand Selection—Trended

The 2026 results are very similar to the 2024 results. Availability and Price continue to be the leading top-3 reasons for original brand selection. Note that as a first and top-3 choice, Availability eclipses all other attributes. As noted on the previous page, this has been the case since at least 2014.

- Two reasons saw significant differences versus 2024: Made in America went up from 5% to 11% and Ease of Installation dropped from 20% to 9%.
- There are a few differences by number of employees since 2024.
 - Among smaller firms (1-9 employees): Manufacturer Reputation and Ease of Installation both saw significant decreases from 2024. Manufacturer Reputation (21% to 11%) and Ease of Installation (21% to 11%) both saw decreases on a top-3 reason basis (not shown).
 - Among larger firms (10+ employees): Ease of Installation saw a significant decrease from 2024 (20% to 8%) on a top-3 reason basis (not shown).

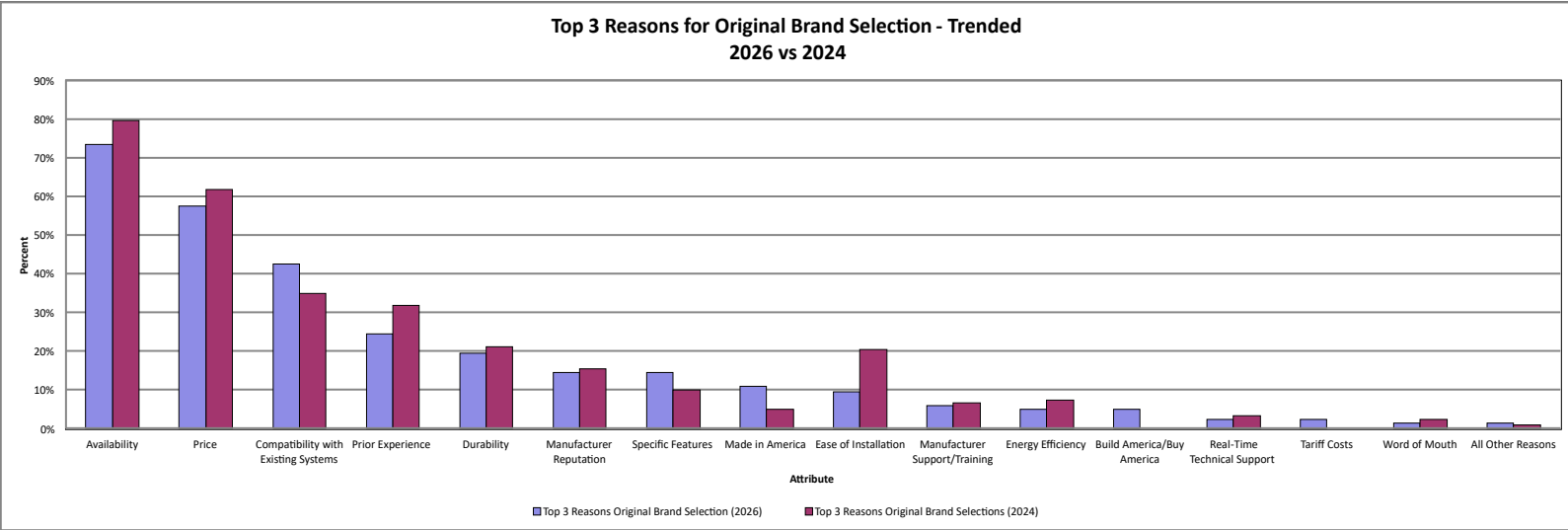


Table 165

Brand Substitution:

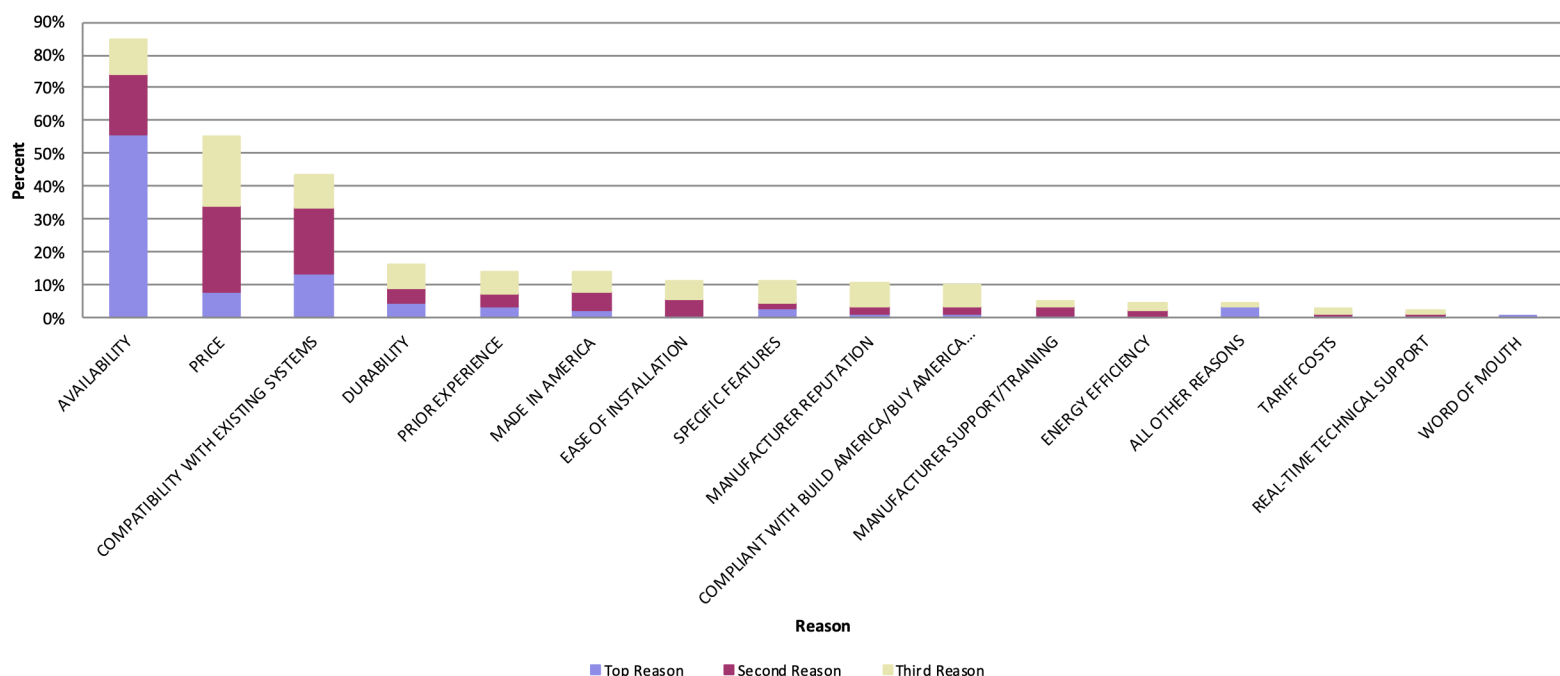
In 2026, the top-3 reasons for brand substitution mirror those for original brand selection. Among the total sample, Availability and Price trump all other attributes as a top-3 reason for brand substitution. Note that as a first and top-3 choice, Availability completely overshadows all other attributes. This was also the case since 2016.

Compatibility with Existing Systems, which was first asked in 2014, had resonance with 44% of electrical contractors. Durability, Prior Experience, Made in America Ease of Installation, Specific Features, Manufacturer Reputation and Compliant with Build America/Buy America certification (added in 2026) form the next tier, chosen by between 16% and 10 % of electrical contractors on a top-3 reason basis for making a brand substitution. Fewer than 5% chose: Energy Efficiency, Tariff Costs (added in 2026), Real-time Technical Support or Word-of-mouth.

Compared with two years ago, only price dropped significantly to 55% from 65% two years earlier.

- There were no statistically significant changes among firms with 1-9 employees compared with two years ago (not shown).
- Price, Manufacturer support and Training dropped significantly among firms with 10+ employees. In contrast, Manufacturer reputation rose significantly among firms with 10+ employees (not shown).

Top 3 Reasons for Brand Substitution, 2026



Tables 155 - 157

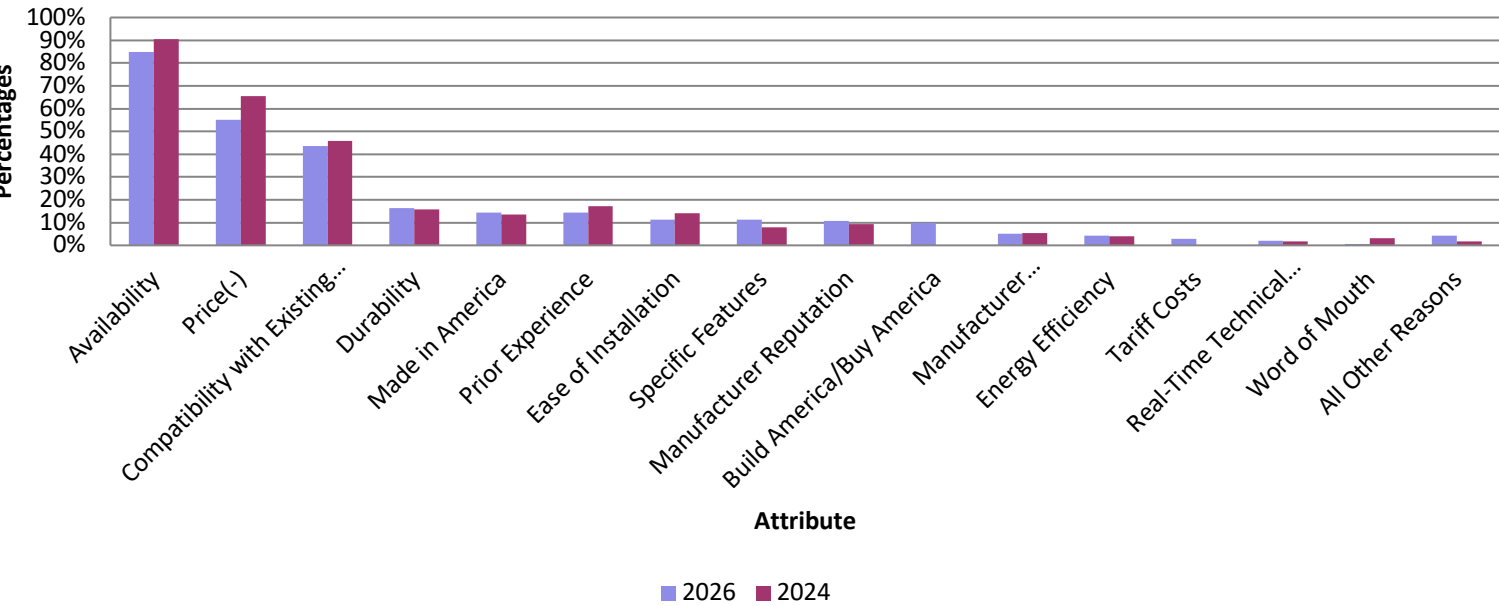
Top 3 Reasons for Brand Substitution—Trended

As with original brand selection, the 2026 results for brand substitution generally mirror the 2024 Profile results: Availability and Price, but especially Availability, tower over all other reasons. Compatibility with Existing Systems is solidly in third place.

Among the total sample, compared with two years ago, Price dropped substantially and significantly from 65% to 55%.

- There were no significantly different changes among small companies (1-9 employees) compared with two years ago (not shown).
- Price dropped significantly among large firms (10+). In addition, Manufacturer Reputation and Manufacturer Support and Training rose significantly among firms with 10+ employees (not shown).

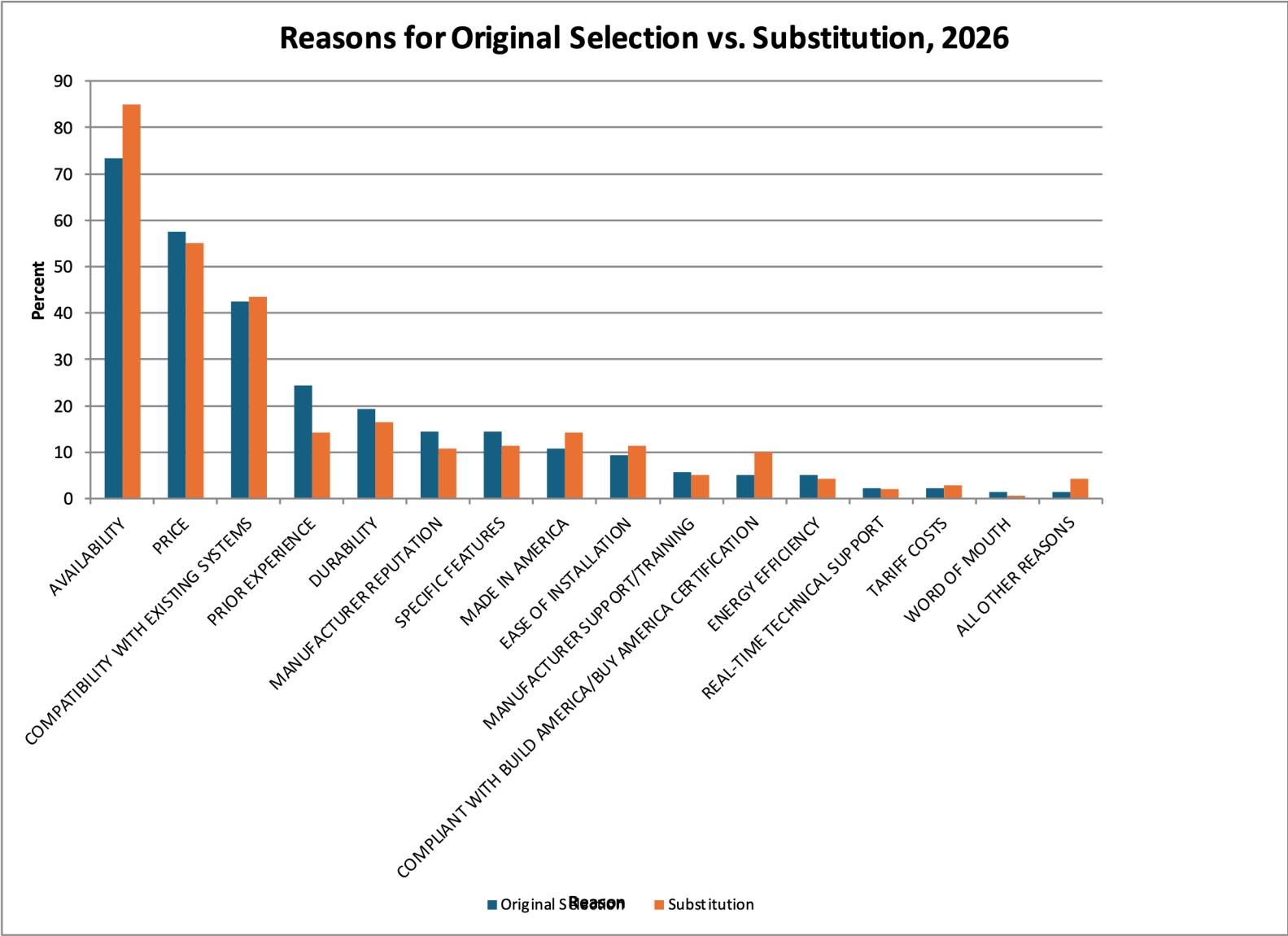
Top 3 Reasons for Making a Substitution: 2026 vs 2024



(-) or (+) indicates a statistically significant difference vs. two years earlier

Table 159

Not surprisingly, availability emerges as even more important in the brand substitution process. Because they share the same respondents, the ratings for original brand selection and brand substitution cannot be statistically tested.



Tables 159, 165

▲ TRAINING AND TOPICS OF INTEREST

Will Take/Have Taken Training and What Was Studied

Just over seven in 10 electrical contractors (74%) say that they, or someone in their firm, has taken training in the past 12 months; while just over eight in ten (84%) plan to take training in the next 12 months to improve or broaden skills for certification. This training could be in the form of online, field or classroom training. There were statistically more contractors in 2024 than 2026 who have taken training in the past 12 months (85% to 74%).

Because of the pandemic, in 2022, we asked about whether the training was or will be “hybrid,” (a combination of online and in-person methods) and regardless of whether they participated in hybrid training or not, we asked if they thought the hybrid approach would continue into the future.

- As was the case two years ago, one-half has already or will take hybrid training.
- Two thirds of contractors (66%) think that the hybrid approach will continue into the future. This is statistically lower than 2024 (72%).

The courses receiving the most mentions include NEC Usage and/or Changes (62%), Safety (Electrical/Personal/On-site/Job site) (57%) and Grounding/Bonding (43%). NEC Usage and/or Changes is statistically up from 2024 (50%).

Interestingly, three non-technical courses are down from 2024: Personnel/Leadership (52% to 36%), Project Management (32% to 22%) and Developing New Business (22% to 13%).

Eighty percent of electrical contractors have taken or will take three or more courses.

Tables 68-72, 414

Courses Taken or Will Take							
	<u>2026</u>	<u>2024</u>	<u>2022</u>	<u>2020</u>	<u>2018</u>	<u>2016</u>	<u>2014</u>
V1/2 Q.14a, Q.14b, Q.14d	(165)	(149)	(102)	(239)	(233)	(350)	(560)
	%	%	%	%	%	%	%
Have Taken Training in Past 12 Months	74	<85	83	79	74	70	76
Will Take Training in Next 12 Months	84	86	85	80	77	78	74
Courses Taken or Will Take							
Base	(125)	(116)	(90)	(195)	(189)	(282)	(414)
	%	%	%	%	%	%	%
MENTIONED ANY	100	100	98	96	97	98	97
NEC Changes	62 >	50	54	50	54 <	71	67
LIGHTING (Net)	38	46	37	40	46 <	58	58
Controls/Systems	21	<35	24	27	33 <	44	50
LED Fixtures	22	30	23	N/A	N/A	N/A	N/A
Lighting Design	14	17	16	17	18 <	26	31
Lamp Technology, incl. LED	13	16	17	21 <	33	39	33
Drivers/Ballasts	14	13	13	18	23 <	30	35
Safety (Electrical/Personal/On-site/Jobsite)	57	64	53	53 >	37	42	47
Grounding/Bonding	43	34	44	43 >	32 <	49	50
AUTOMATION/CONTROLS (Net)	34	35	35	32	32 <	43	< 52
Fire/Life Safety Systems	18	22	15	18	20	23	< 30
Building Automation Systems	10	12	8 <	15	15	17	< 25
Home Automation Systems	10	12	8	12	9 <	23	20
Security Systems	9	10	12	14	13	13	< 20
Electrical Testing and Maintenance	38 >	25	28	28	27 <	34	N/A
GREEN/SUSTAINABLE (Net)	31	41	32	32 >	23 <	40	39
Electric Vehicle Charging Stations	26	29	22	18 >	10	14	13
Energy Storage	14	15	10	13 >	6	9	8
Alternative Energy Systems	9	13	11	15	11 <	22	24
Energy Use Regulations	7	7	5	8	6 <	11	12
LEED Certification	5	6	4	6	6 <	12	12
Green/Sustainable Building/Energy Audits	6	5	7	7	7	8	10
Community Solar	0	N/A	N/A	N/A	6	10	N/A
Bolded numbers > and < indicate that the percentage is higher or lower at the 90% level of confidence							

Tables 68, 69, 72

Courses Taken or Will Take Tables 68, 69, 72

	<u>2026</u> (125) %	<u>2024</u> (116) %	<u>2022</u> (90) %	<u>2020</u> (195) %	<u>2018</u> (189) %	<u>2016</u> (282) %	<u>2014</u> (414) %
CABLING (Net)	20	18	23 >	14	<23	<33	37
Data and Telecom: Cable, Conduit, etc.	12	13	16 >	7	<15	19	23
Data and Telecom: Testing	12	10	11 >	5	<13	16	18
Power	14	8	13	8	<14	<24	24
Estimating/Financial Management	28	37 >	23	26 >	13	<19	21
Estimating	26	35 >	22	24	N/A	N/A	N/A
Financial Management	10	14 >	4	9	N/A	N/A	N/A
Developing New Business Opportunities	13	<22 >	5	<12	8	<21	17
Increasing Productivity	13	19	13	11	9	<17	20
Electrical System Design or BIM	10	16	11	10	9	<22	18
Design/Build	10	14	9	12	11	<25 >	19
How to Use New Software	14	14	15	12	9	<15	N/A
Systems Integration	10	13	14	9	9	11	< 21
Power Quality	20 >	12	14	15	14	19	21
Pre-Fab/Off-site Building	8	12 >	5	5	3	<10	N/A
Sound and Video/VDV (Commercial or Residential)	8	10	10	6	N/A	N/A	N/A
HVAC	10	7	9	6	10	N/A	N/A
Internet of Things	5	3	7	7	7	N/A	N/A
Line Work	4	3	7	3	4	<8	8
Drones	2	3	3	2	2	N/A	N/A
Renovation/MACS/Maintenance	3	1	1	<5	3	<9	< 17
Collaborative Building (Including IPD)	2	1	3	4	2	<5	N/A
<u>New In 2020</u>							
Personnel/Leadership	36	<51	44 >	24	N/A	N/A	N/A
OSHA Code Compliance	34	39 >	26	35	N/A	N/A	N/A
Code Compliance (non-OSHA)	37	35	27	<37	N/A	N/A	N/A
Project Management Training	22	<32	24 >	15	N/A	N/A	N/A
Foreman Development	13	21	17	10	N/A	N/A	N/A
Executive Leadership	11	16	12	7	N/A	N/A	N/A
Lean, Agile, Six Sigma	2 >	0	1	4	N/A	N/A	N/A
<u>New In 2022</u>							
Safety and Wellness	23	24	23	N/A	N/A	N/A	N/A
<u>New In 2024</u>							
Bidding /Writing Proposals for Govt Work	14	10	N/A	N/A	N/A	N/A	N/A
<u>New In 2026</u>							
Artificial Intelligence (AI)	14	N/A	N/A	N/A	N/A	N/A	N/A
Mentioned 1	11	6	<17	19	24 >	9	12
Mentioned 2	9	11	10	8	< 15	11 >	7
Mentioned 3 or more	80	83 >	71	69 >	58	<78	78
Mentioned 6 or more	49	59	49	42	35	<50	49

Tables 68, 69, 72

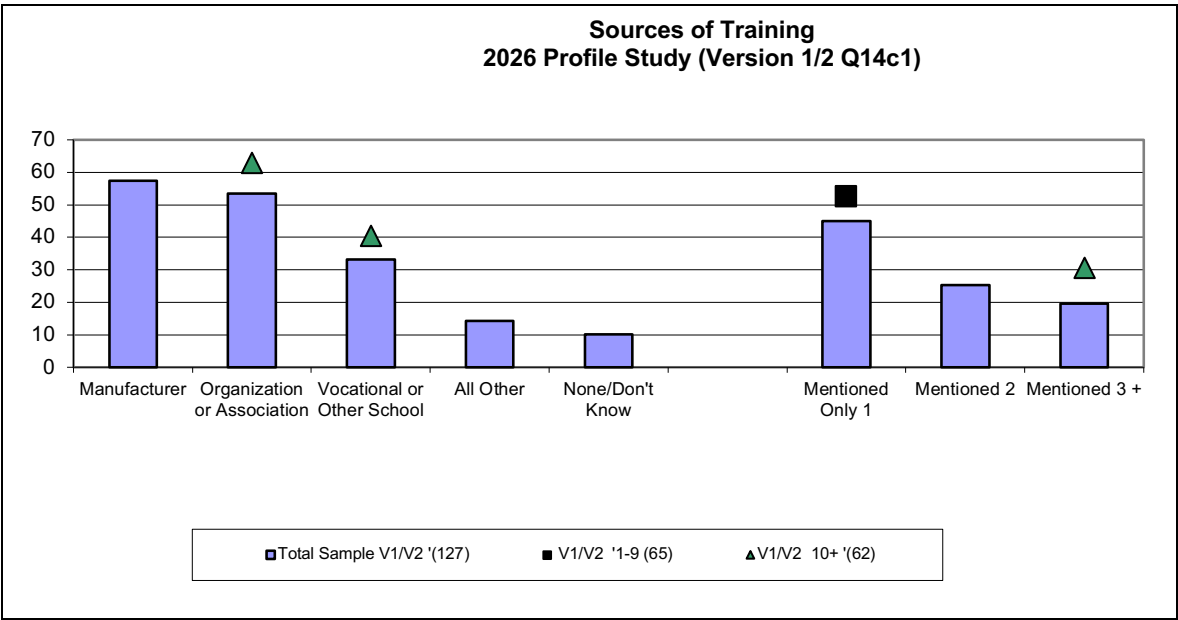
For both training and certification, sources appear to be tiered, with more electrical contractors turning to an Organization/Association and a Manufacturer than to Vocational/Other School.

- There was a statistical increase from 2024 to 2026 for both training (44% to 58%) and certification (31% to 43%) for Manufacturers. Organization/Association saw a statistical decrease in certification (58% to 45%) (not shown).

A significantly higher percentage of larger companies (10+ employees) indicated they will be getting training at an Organization/Association or Vocational/Other School than smaller companies (1-9 employees).

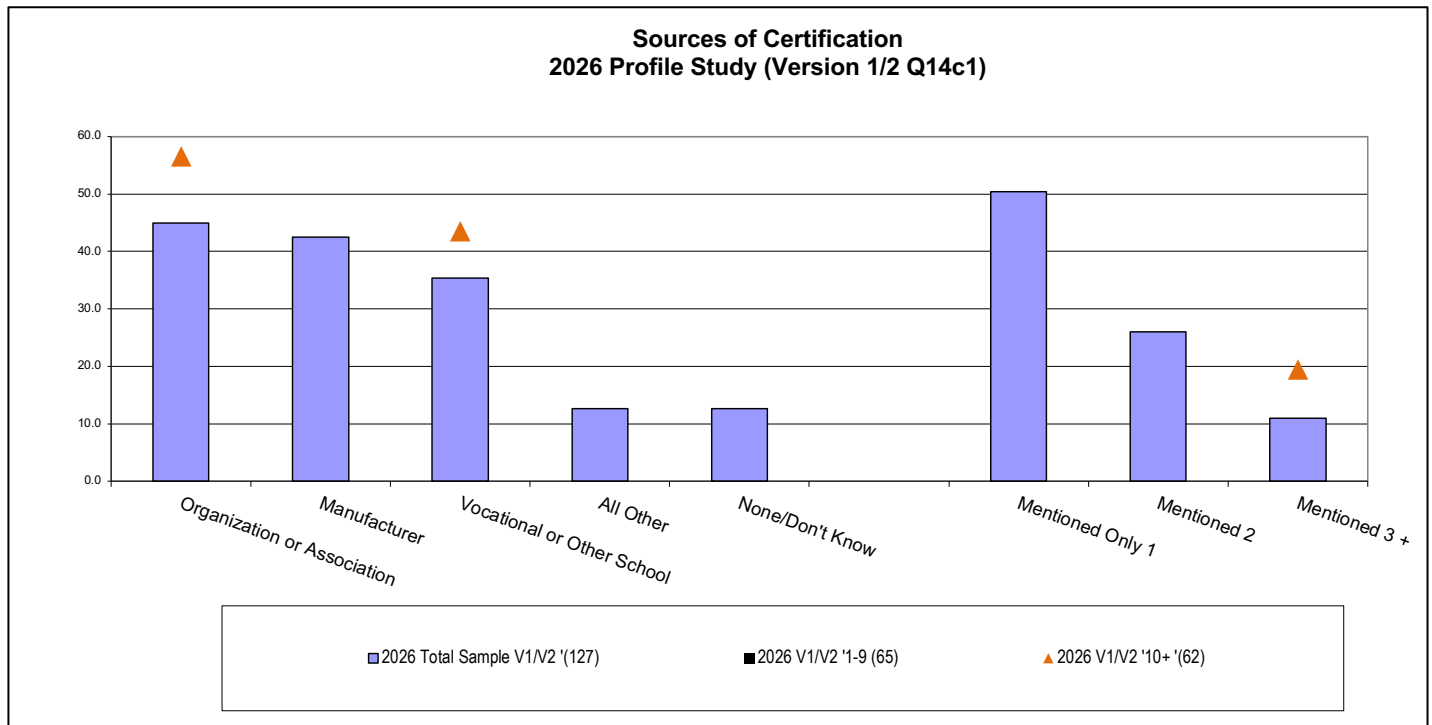
Smaller companies were more likely to mention one source for training while larger companies mentioned three or more sources.

Table 70



Larger firms are more likely to use an Organization/Association or Vocational/Other School as sources for their certification than small firms.

(Table 71)



NEW 2026 TOPICS

▲A.I. (Artificial Intelligence)

Given the amount of its mainstream press coverage, we added questions about artificial intelligence (A.I.) in the 2026 Profile Study to begin to gauge its impact on electrical contracting. The questions were asked in various sections (versions) throughout the survey rather than in a single, continuous section and different questions were answered by different groups of respondents.

The results indicate that A.I. use and knowledge is not widespread among electrical contractors.

Because Data Centers are tied to A.I., we included Data Centers in this section of the report. Larger firms are more engaged with A.I. and data centers compared with smaller firms.

Data Center Work

17% of electrical contractors reported their company performed data center work last year, which is down statistically significantly from 23% in 2024. Fewer small companies in 2026 reported performing data center work while the number of large companies stayed the same.

Company Performed Data Center Work In 2025						
Q6	Total		1-9		10+	
	2026	2024	2026	2024	2026	2024
	(926)	(828)	(538)	(418)	(388)	(407)
Data Center Work	17%	<23%	7%	<11%	31% [larger than 7%]	35%

Table 38

Bolded > and < indicate statistically significant differences in the direction of the arrow at the 90% level of confidence.

A.I. Course Work

Just over one in ten (14%) contractors reported A.I. was or will be the main focus of course work they have taken or plan to take in the next 12 months. (V1/2 Q14D)

Table 72

Current/Planned Use of A.I. for Electrical Contracting or Low-Voltage Projects

One quarter of respondents currently or plan to use A.I. for electrical contracting or-low-voltage projects. Conversely, three-quarters do not currently and do not plan to do so. Although not in a complete straight line, use of A.I. increases with company size (5-9 > 1-4; 10-19 > 5-9; 10+ > 1-9; 100+ > 20-99).

Current/Planned Use Of A.I. For Electrical Contracting or Low-Voltage Projects

Online Version, Q3	Total	1-4	5-9	1-9	10+	10-19	20-99	100+
	(780)	(330)	(97)	(427)	(320)	(90)	(120)	(110)
<u>Yes (Net)</u>	<u>25%</u>	<u>11%</u>	<u><18%</u>	<u>13%</u>	<u><41%</u>	<u>36%</u> [larger than 5-9]	<u>36%</u>	<u><51%</u>
Yes	12%	6%	7%	6%	20%	19%	17%	25%
Not currently but plan to do so	13%	5%	11%	7%	21%	17%	19%	26%
<u>No (Net)</u>	<u>75%</u>	<u>89%</u>	<u>82%</u>	<u>87%</u>	<u>59%</u>	<u>64%</u>	<u>64%</u>	<u>50%</u>
No	53%	56%	58%	56	48	53%	48%	44%
Not currently and not planning to do so	22%	33%	24%	31	11	11%	16%	6%

Bolded > and < indicate statistically significant differences in the direction of the arrow at the 90% level of confidence.

Table 1032

Ways A.I. Is Used for Work Projects

When asked in what ways they or their firm used A.I. for work projects, in estimating (77%), automating routine administrative tasks (56%) and in design (50%) were most often mentioned. The base size does not allow for meaningful analysis by company size.

Ways Used A.I. For Work Projects

Online Version, Q4	(93)
In estimating	77%
Automating routine administrative tasks	56%
In design	50%
In takeoffs	40%
Enhancing safety and risk management	33%
Optimizing project scheduling and resource allocation	32%
Improving predictive maintenance for equipment	26%

Table 1034

Use of A.I. in the Office/in the Field

Almost three in ten (29%) reported their firm uses A.I. in the office; while just over one in ten (14%) reported their firm uses A.I. in the field. Compared with smaller firms, larger firms tend to make more use of A.I. in the office.

Once again, there is some indication that larger firms are more engaged with AI, especially in the office, as opposed to the field.

Use A.I. In The Office/In The Field

	Total	Number of Employees						
		1-4	5-9	1-9	10+	10-19	20-99	100+
Online Version Q5	(780)	(330)	(97)	(427)	(320)	(90)	(120)	(110)
	%	%	%	%	%	%	%	%
In the office	29	16	<25	18	<42	40	38	46
Online Version Q6	(774)	(328)	(96)	(424)	(317)	(89)	(119)	(109)
In the field	14	11	9	10	<19	19	21	17

Bolded > and < indicate statistically significant differences in the direction of the arrow at the 90% level of confidence.
Tables 1035, 1036

▲ Tariffs

In the 2026 Profile Study, we asked about the effect of President Trump’s tariffs on five business categories: Hand or power tools, Wire and cable, Transformers, Work vehicles and Building materials (such as copper, aluminum, steel).

“In which areas, if any, are you seeing the effects of the new trade tariffs? Please select all that apply (higher prices, less availability, seeing no effects, don’t use or not shopping for this category). If you are not seeing any effect, or don’t use a particular category, you can also indicate that below.”

Tariffs are associated with higher prices, especially among users of that product category.

Q1a - Effects of the New Trade Tariffs	Higher Prices (Total)	Higher Prices (Category Users)
	(926)	Varies
Wire and cable	33%	81% (382)
Building materials	31%	79% (368)
Hand or power tools	24%	56% (393)
Work vehicles	22%	55% (368)
Transformers	20%	51% (359)

Tables 1018 - 1023

Among users of a given category, less availability is also an issue, but not nearly to the same extent as higher prices. Note that category purchasers could have experienced both effects.

Q1a - Effects of the New Trade Tariffs	Less Availability Total	Less Availability (Category Users)
	(926)	Varies
Wire and cable	4%	10% (382)
Building materials	5%	13% (368)
Hand or power tools	3%	7% (393)
Work vehicles	3%	8% (368)
Transformers	6%	15% (359)

Tables 1018 - 1023

▲ Mean Attribute Satisfaction Ratings

Respondents were asked to rate their satisfaction with five attributers on a 100 point scale where 0 to 10 was labeled “Very Poor,” between 50 and 60 was labeled “ In-Between” and 80 or higher was labeled “Terrific.” Based on these findings, the electrical contractors who participated in the 2026 Profile are at best middling satisfied with Revenue, Profitability and Supply Availability. All of these ratings are lower than their pre-COVID ratings:

- Revenue (pre-COVID) 78.1 (to 62.5, a 15.6-point drop)
- Profitability (pre-COVID) 75.6 (to 58.6, a 17-point drop)
- Supply Availability (pre-COVID) 84.7 (to 60.5, a 24.2-point drop)
- Staffing was asked differently (now as Addressing Workforce Needs) and now rated at 53.7.
- Cost of Materials (which was not asked previously) is now rated at 47.9.

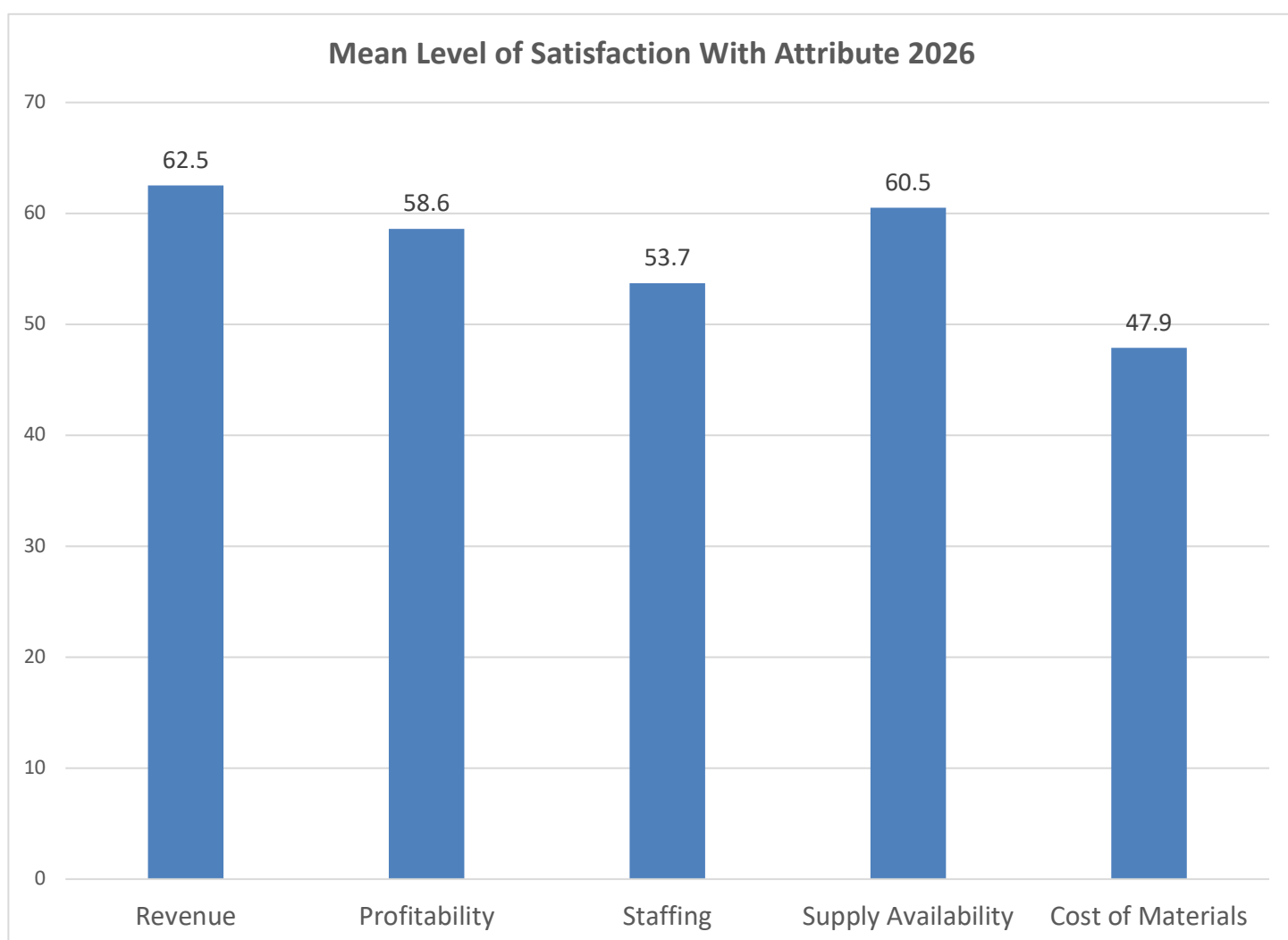


Table 1031

▲ Confidence in the Growth of the Economy

Nevertheless, in spite of the ratings given on the preceding page when compared with 2020 and 2022, confidence levels have almost returned to their prepandemic levels (“How confident are you in the growth of the economy over the next few years?” V5, Q18)

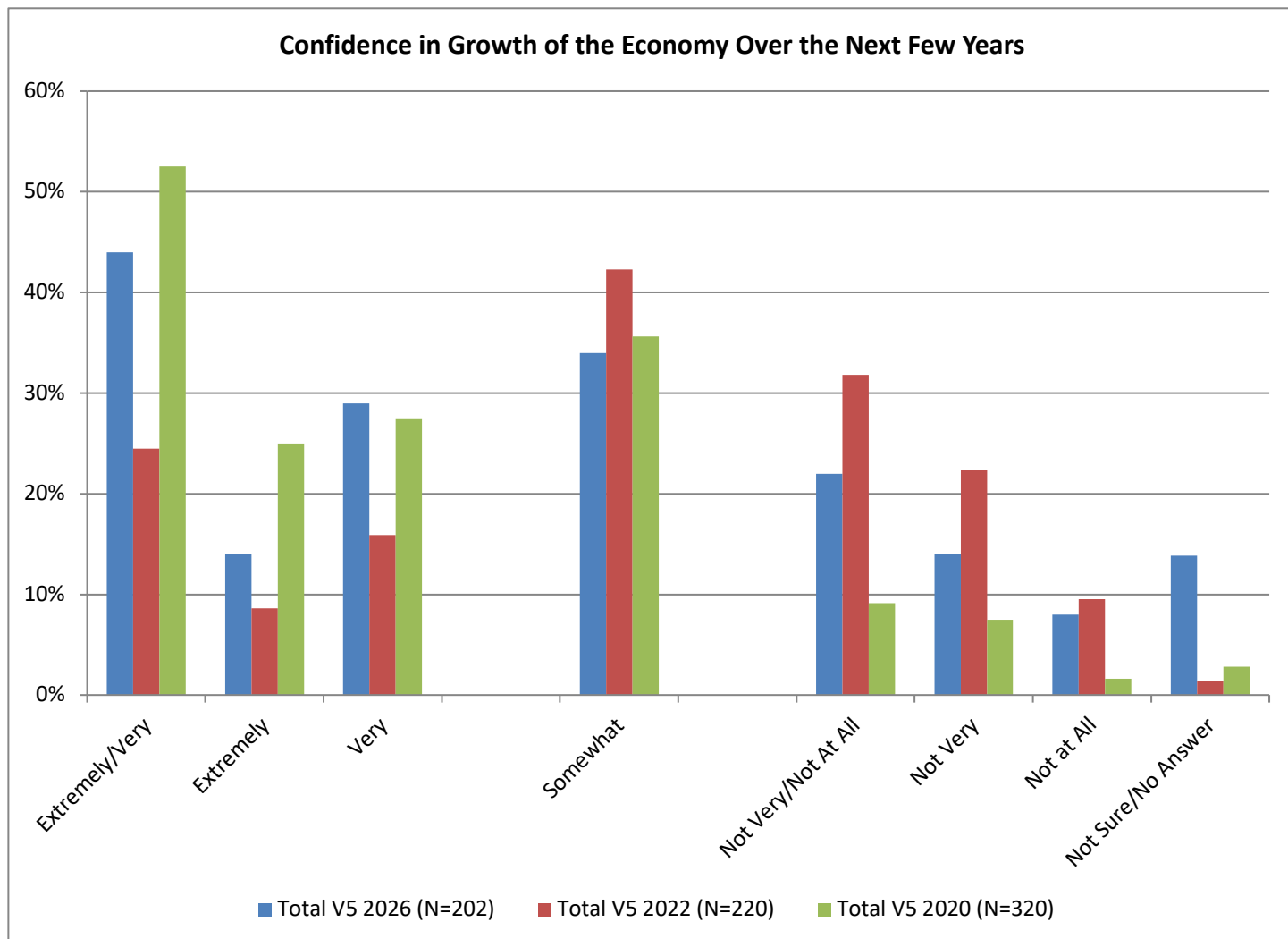


Table 1013

The current confidence level is less strong than prepandemic (green bar) but not as weak as during the pandemic (red bar). There were no statistically significant differences by subgroups.