



Painter Insight Monitor 2018

Research objective

USP Marketing's Painter Insight Monitor aims to provide paint and non-paint manufacturers with market insights that help to better understand one of their core target audiences; **professional painting companies**.

Each annual edition of the monitor is dedicated to a particular theme. The objective of this 2018 edition is to provide a comprehensive understanding of the professional painter's **attitude and behavior in the online domain**, both now and for the future.

This monitor will answer i.a. the following questions:

- What role does the Internet play in running a painting company?
- What are drivers and barriers for (not) using online possibilities?
- How to influence a painter's online attitude and (buying) behavior?
- How interesting are 'pure online shops', which don't have any physical stores?

This report contains the following chapters:

1. Key insights of Painter Insight Monitor 2018
2. **Theme part:** Background of the painter
3. **Theme part:** Running the business online
4. **Theme part:** Online orientation, inspiration and advice-seeking
5. **Theme part:** Online buying
6. **Theme part:** Pure online shops
7. **Annually recurring part:** Spending per channel & Brand funnels



Research methodology:

USP Marketing executes this monitor once per year. Insights are acquired by means of telephone interviews in the 8 major European markets.

Registered painting companies	29.500	12.500	6.000	36.000	8.000	41.000	22.000	32.000
Interviews conducted	250	251	212	250	221	250	250	250



1. Key insights of Painter Insight Monitor 2018



2. Background of the painter



3. Running the business online



4. Online orientation, inspiration and advice-seeking



5. Online buying



6. Pure online shops



7. Spending per channel & Brand funnels

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8. About USP Marketing



The importance of online is expected to accelerate in the coming decade

The younger generation is much more 'Internet-minded' while many older craftsmen will retire



Painters are starting to see the advantages of buying online

Though most currently remain loyal to their physical shop and the habitual way of running their painting company



Reliable and quick delivery times can persuade painters to order online

The painter's trust on delivery times has to be won before he will seriously consider the online channel

Online buying



Share of painters who have ever bought anything online (work-related)



Share of painters who have ever bought from a pure online shop



Online buying is not commonly done, but quite some companies have already tried it

Share of painters that has ever bought the respective product online



PAINTS

Interior wall paints						3%		
Exterior wall paints					10%			
Lacquers		12%						

CONSUMABLES

Brushes and rollers	18%							
Tapes							6%	
Wall fillers			5%					
Acrylic sealants		8%						
Wood repair products	10%							
Wood care products				16%				

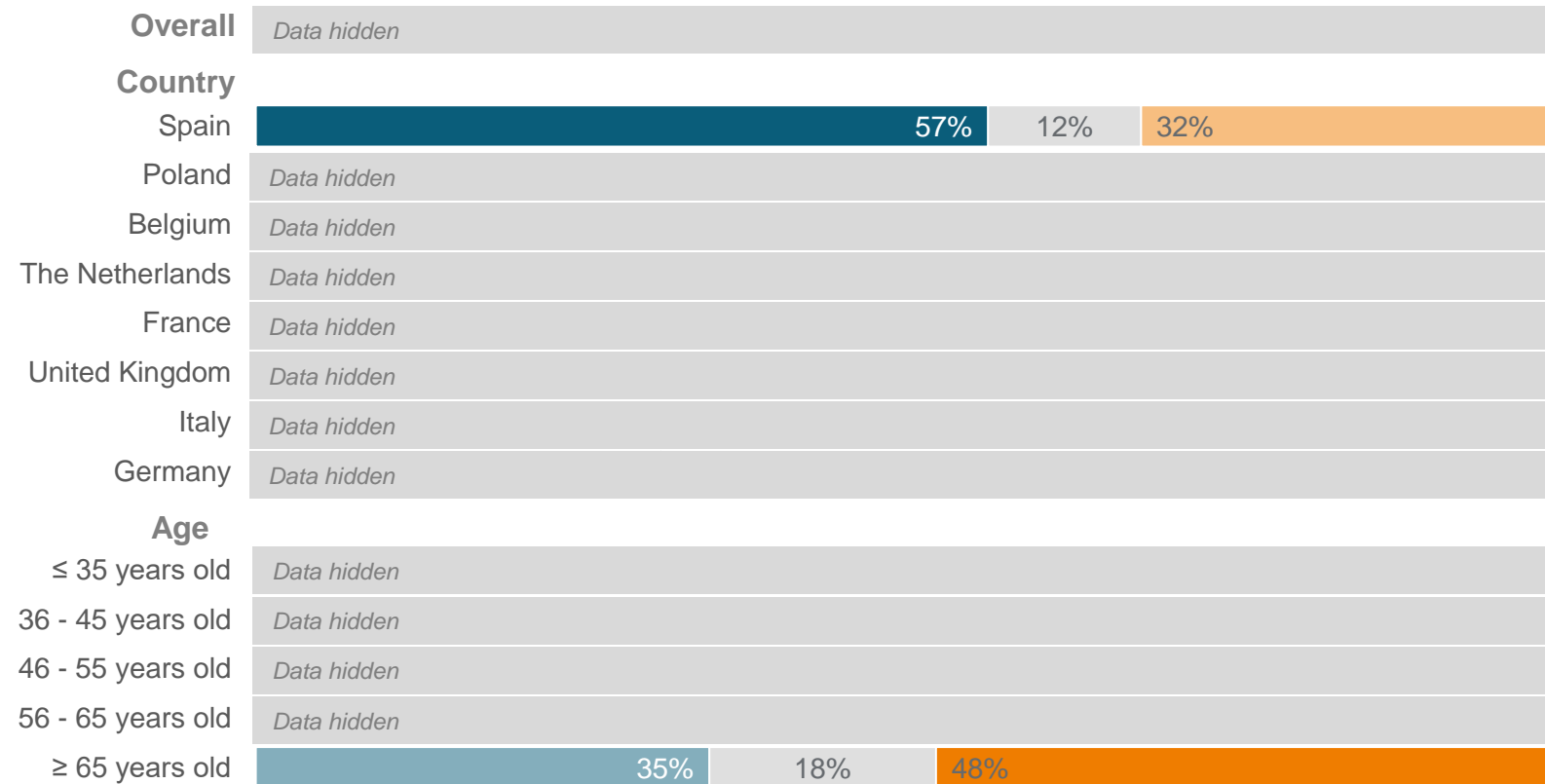
POWER TOOLS

Sanding machines					17%			
Paint sprayers	26%							
Dust extractors and vacuums			5%					

Responses are based on the survey question "Can you tell me how frequently you buy online, when having to buy the following products?".

The importance of the Internet to my business will grow in the future

■ Agree
 ■ Neither Agree or Disagree
 ■ Disagree



Generally, those who already consider the Internet to be important for their business expect this importance to grow. Those who do not yet acknowledge the importance of the Internet, are not very likely to start doing this in the future.

Responses are based on the survey question "To what extent do you agree or disagree with the following statements?".

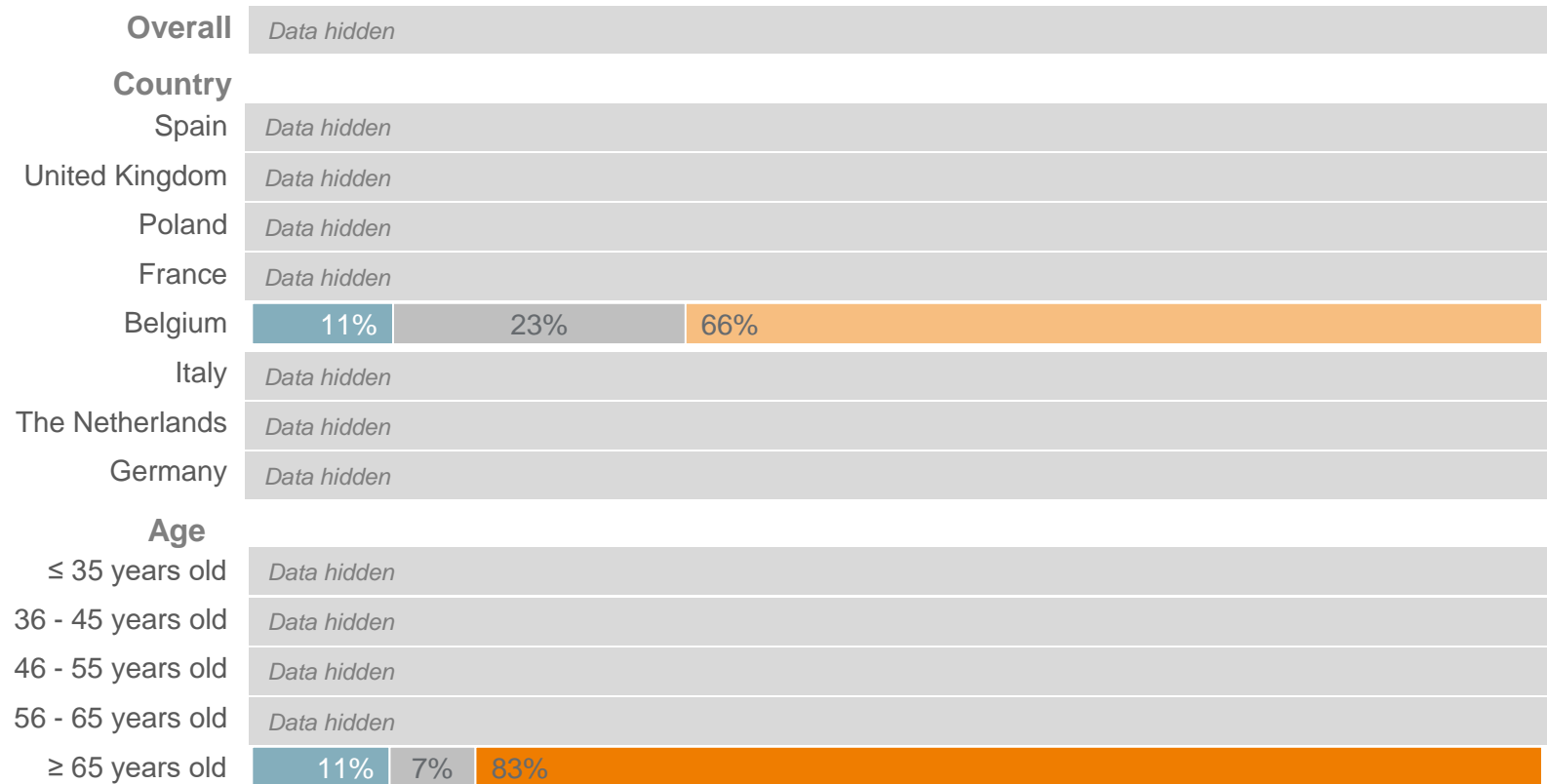
There is already some interest in Amazon Services, especially in Spain

The younger generations are quite open to this type of online services model

I am interested to become an Amazon Services-partner of my main brand

Meaning that I can be hired to apply the products which people buy via Amazon

■ Agree ■ Neither Agree or Disagree ■ Disagree

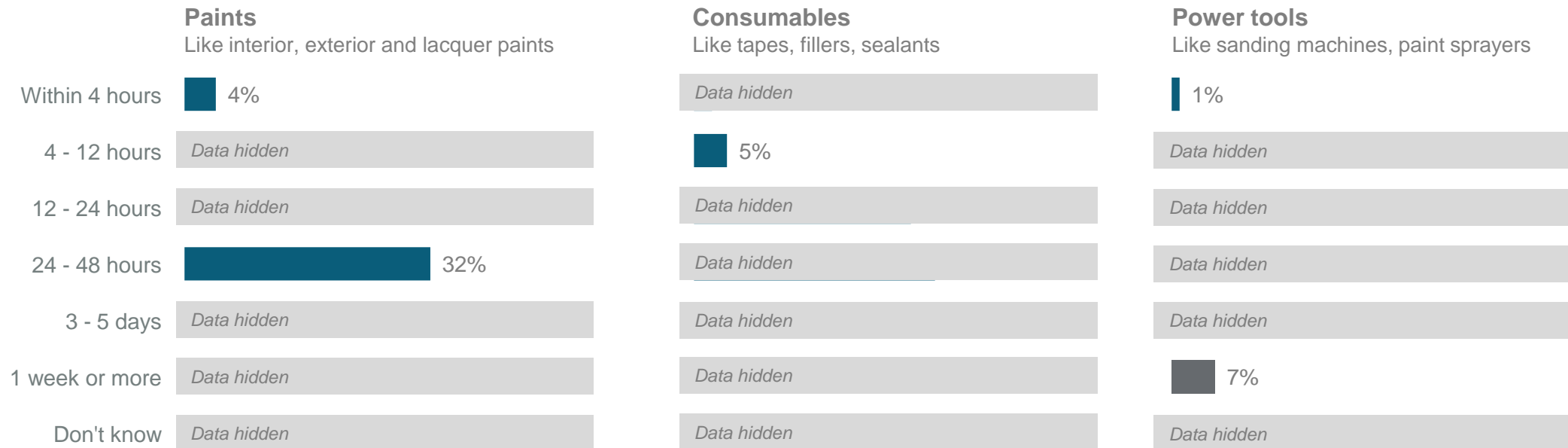


Responses are based on the survey question "To what extent do you agree or disagree with the following statements?".

1 in 3

painters expects **one-day delivery** for paint products

Expected delivery time when ordering online



Responses are based on the survey question "What is your expected delivery time when ordering paints / consumables / power tools?".

The population of professional painters is relatively old

Especially in United Kingdom, Netherlands, Germany and Italy the labour outflow will likely outpace the inflow

Age division of professional painters per country

■ 35 years and younger ■ 36 - 45 years ■ 46 - 55 years ■ 56 - 65 years ■ 65 years and older



Average age

56

Share of population which will retire in coming 10 years

51%

Responses are based on survey question "What is your age?".

Why do you never buy products online?

	51%	41%	35%	61%	56%	23%	69%	58%
	23%	18%	22%	11%	14%	20%	14%	52%
No personal relationship / connection	18%	17%	22%	15%	17%	11%	13%	32%
I do not trust online buying/ Internet	16%	9%	7%	16%	15%	11%	13%	27%
	11%	3%	10%	19%	12%	3%	9%	16%
Better prices / promotions on shop	10%	14%	11%	7%	22%	7%	13%	5%
	9%	11%	4%	5%	12%	18%	8%	5%
		0%	4%	2%	1%	14%	0%	10%
		8%	3%	3%	4%	2%	1%	11%
		1%	4%	2%	13%	1%	1%	0%
		0%	8%	3%	4%	3%	0%	3%
		2%	1%	2%	12%	0%	1%	4%
		0%	7%	2%	5%	11%	0%	8%
		0%	4%	1%	3%	1%	0%	0%

Responses are based on the survey question "Why do you never buy products online?"

A yearly recurring part in the Painter Insight Monitor involves an overview of the spending per channel and an overview of the brand funnel; the leading brands per country in terms of shares for spontaneous brand awareness, brand usage, and most used brand.

These results are available for:

- (1) interior wall paints
- (2) exterior wall paints
- (3) lacquers
- (4) wood care products
- (5) acrylic sealants
- (6) tapes
- (7) wood repair products
- (8) wall fillers
- (9) sanding machines
- (10) brushes & rollers
- (11) paint sprayers.



The following slides show only the results for the product groups which have been agreed upon by USP Marketing and your organization.

The leading brands in the brand funnel



The brand funnel:



Shown for:

- 1. Interior wall paints
- 2. Exterior wall paints
- 3. Lacquers
- 4. Wood care products
- 5. Acrylic sealants
- 6. Tapes
- 7. Wood repair
- 8. Wall fillers
- 9. Sanding machines
- 10. Brushes & rollers
- 11. Paint sprayers



Brand	Spontaneous awareness	Usage	Most used
BrandX	62%	40%	14%
BrandX	54%	34%	20%
BrandX	52%	32%	22%
 BOSS paints <small>Verbonden door vakmanschap. Unis par le métier.</small>	26%	18%	17%
BrandX	26%	9%	3%
BrandX	25%	12%	2%
BrandX	20%	15%	11%
 MATHYS	18%	9%	3%



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



Dedicated and **multi-client** research

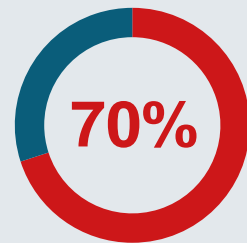


Active in the market for over **25 years**

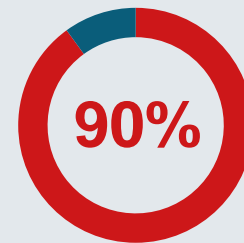


220 dedicated market research projects in 2017

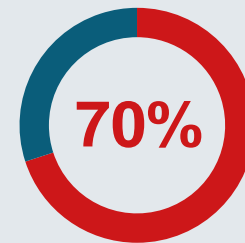
Revenue distribution



turnover coming from international projects



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



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

Research in

39

countries in 2017



82
focus groups



1.102
in-depth interviews



57.881
B2B CATI interviews



57.250
B2C online interviews



Examples



Segmentation



Customer journey



Branding



Concept/product research



Customer satisfaction



Trends



Distribution research



Market exploration



Pricing









Market size



Dedicated market research

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

Providing continuous information for our clients about their main target groups based on facts. Providing insights on key trends, turnover development, future building volumes, background characteristics of the target groups and much more.

					
<p>Architects</p> <p>European architectural Barometer</p> <p>8 countries</p> <p>reports quarterly</p> <p>6,400 interviews by phone annually</p> <p>Trends like BIM, DMU, Media orientation and future building volumes</p>	<p>Contractors</p> <p>European contractors monitor</p> <p>8 countries</p> <p>reports quarterly</p> <p>6,400 interviews by phone annually</p> <p>Trends like BIM, DMU, Media orientation and branding</p>	<p>HVAC installers</p> <p>European mechanical installation monitor</p> <p>6 countries</p> <p>reports quarterly</p> <p>4,800 interviews by phone annually</p> <p>Trends like Branding, purchase channels, Media orientation and characteristics including Turnover and order book developments</p>	<p>Electrical installers</p> <p>European electrical installation monitor</p> <p>7 countries</p> <p>reports quarterly</p> <p>4,800 interviews by phone annually</p> <p>Trends like Branding, purchase channels, Media orientation and characteristics including turnover and order book developments</p>	<p>Painters</p> <p>Painter insights</p> <p>8 countries</p> <p>reports annually</p> <p>2,000 interviews by phone annually</p> <p>Trends like mechanical application, labour shortage, purchase points and branding</p>	<p>Consumers</p> <p>European home improvement monitor</p> <p>11 countries</p> <p>reports quarterly</p> <p>26,400 online interviews annually</p> <p>Trends like DIY vs DFM, online buying, branding and information on a product level</p>

Construction		Installation		DIY		Living & Real Estate	

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