



PAINTER INSIGHT MONITOR - 2020

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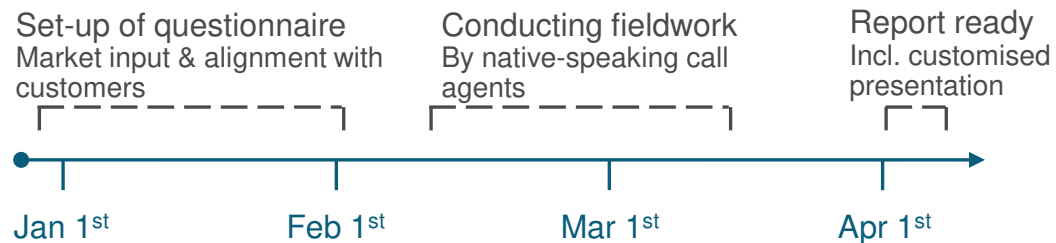
THE GOAL

To check and track the behaviour of registered professional painting companies. This is done by means of 2,350 phone interviews, divided over 10 major European markets.

THE TOPICS

- Recurring: **Profiling the professional painter**
- Recurring: **Tracking relevant market trends**
- Recurring: **Brand funnels** (separate report)
- Theme: **Future expectations, challenges and needs**

THE TIMELINE



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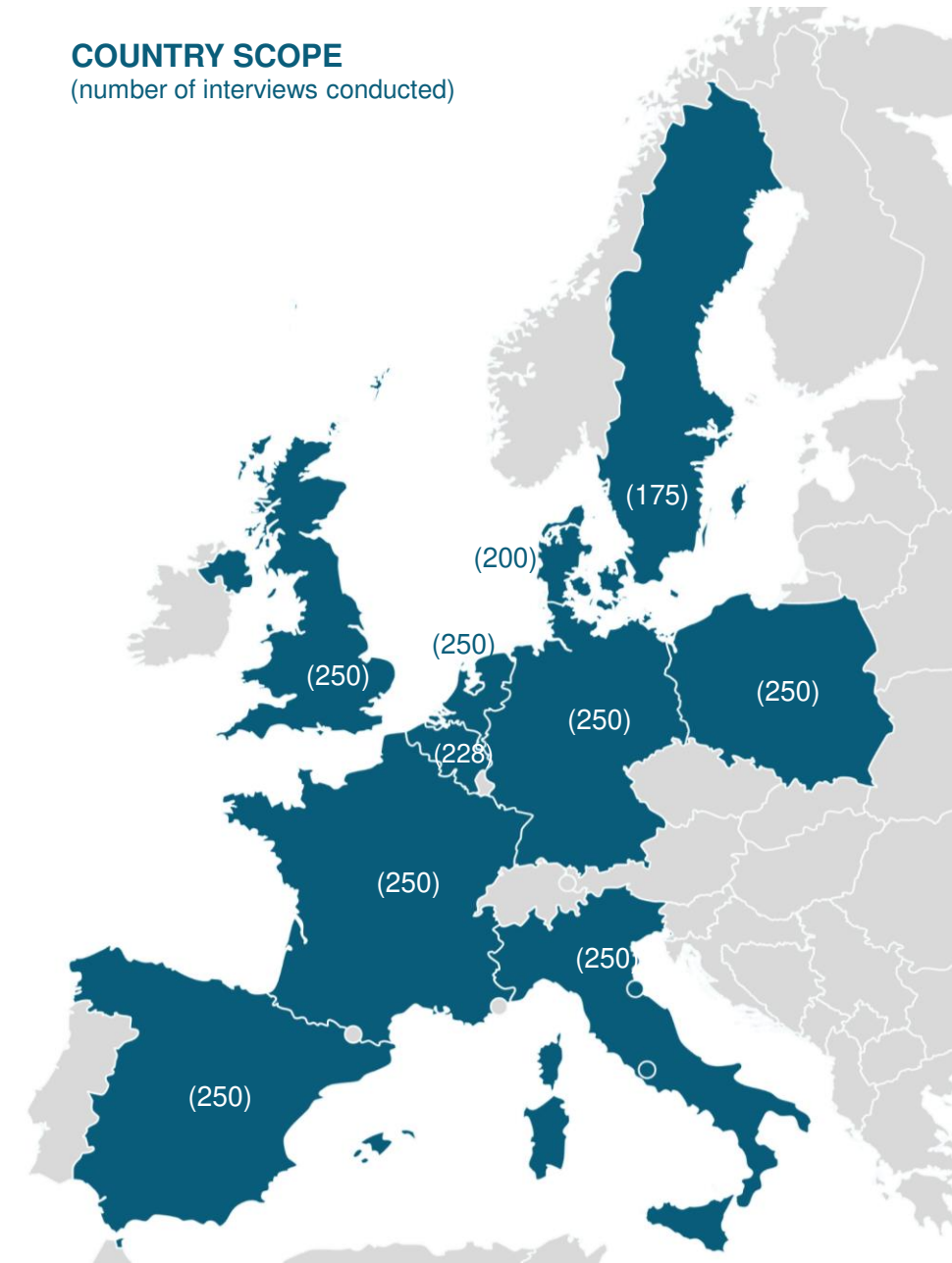
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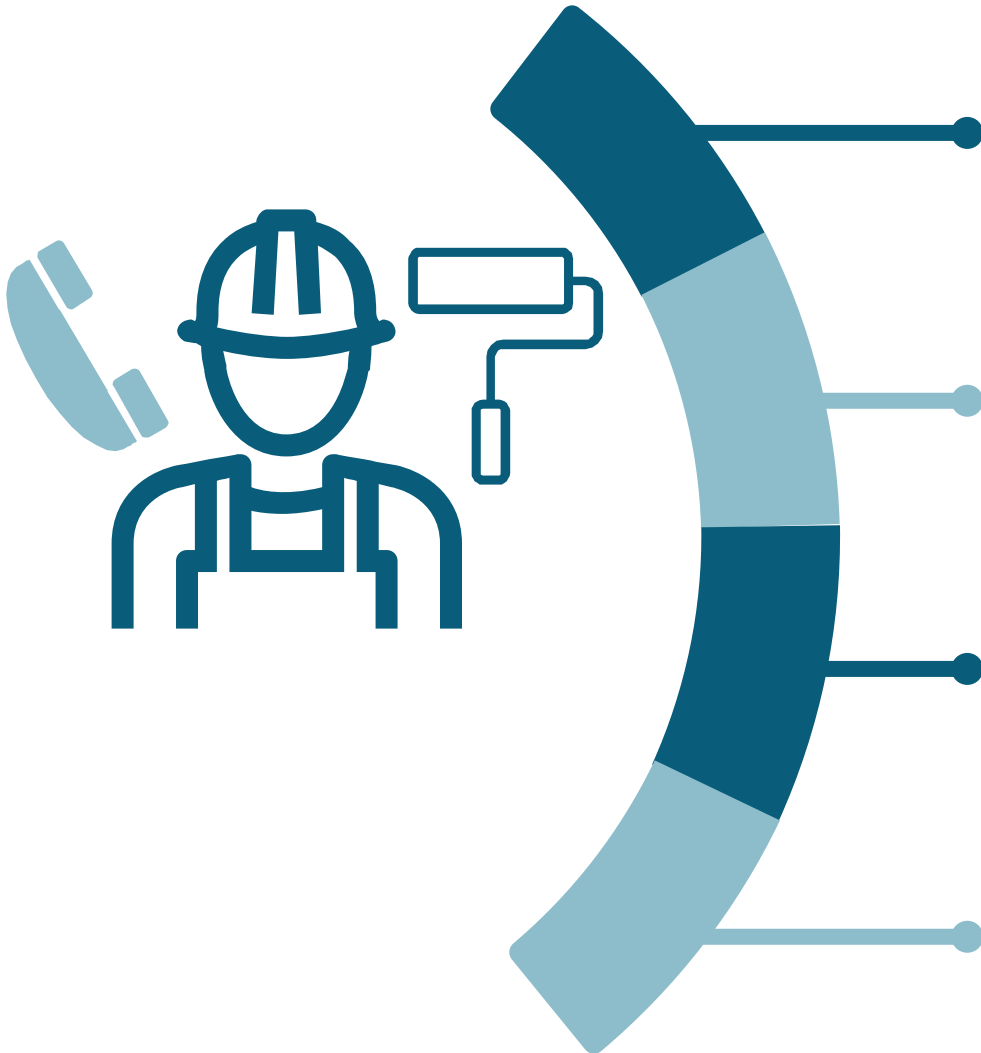
hoogenboom@usp-mc.nl

COUNTRY SCOPE

(number of interviews conducted)



About the target group and methodology



Researching registered professional painting companies...

Selected respondents need to have authority over the purchase decision on paint and non-paint products. 90%+ of the interviews is conducted with owners/ directors of these companies.

... whilst ensuring a certain degree of paint specialisation

Companies who indicate to spend less than 10% of their working time on painting are not eligible for participation. On average, interviewed companies spend 76% of their time on painting.

... selected from a country-representative database

USP possesses an updated, international database on professional painting companies, which is representative for the painter population in each country.

... through phone interviews, by native-speaking agents

Phone surveys are the best approach for obtaining a sufficient sample, in order to provide insights which can be relied on. These phone calls are made by fixed fieldwork partners, located in the respective countries.

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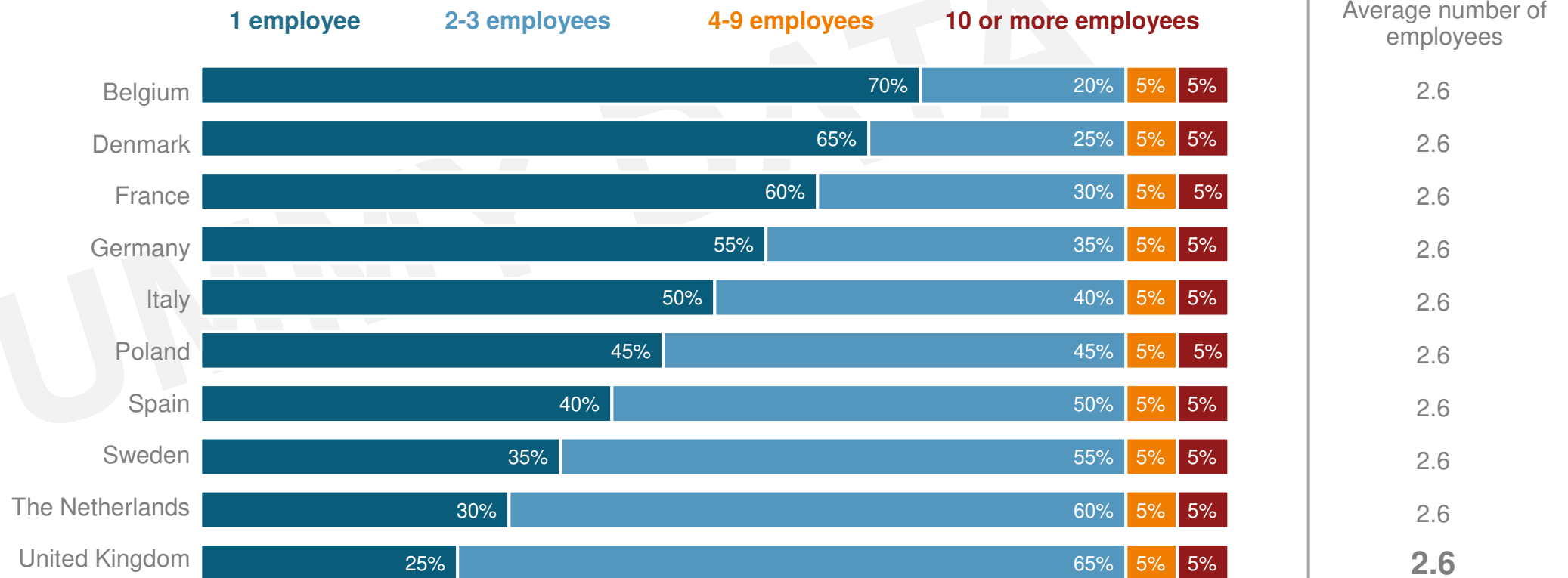
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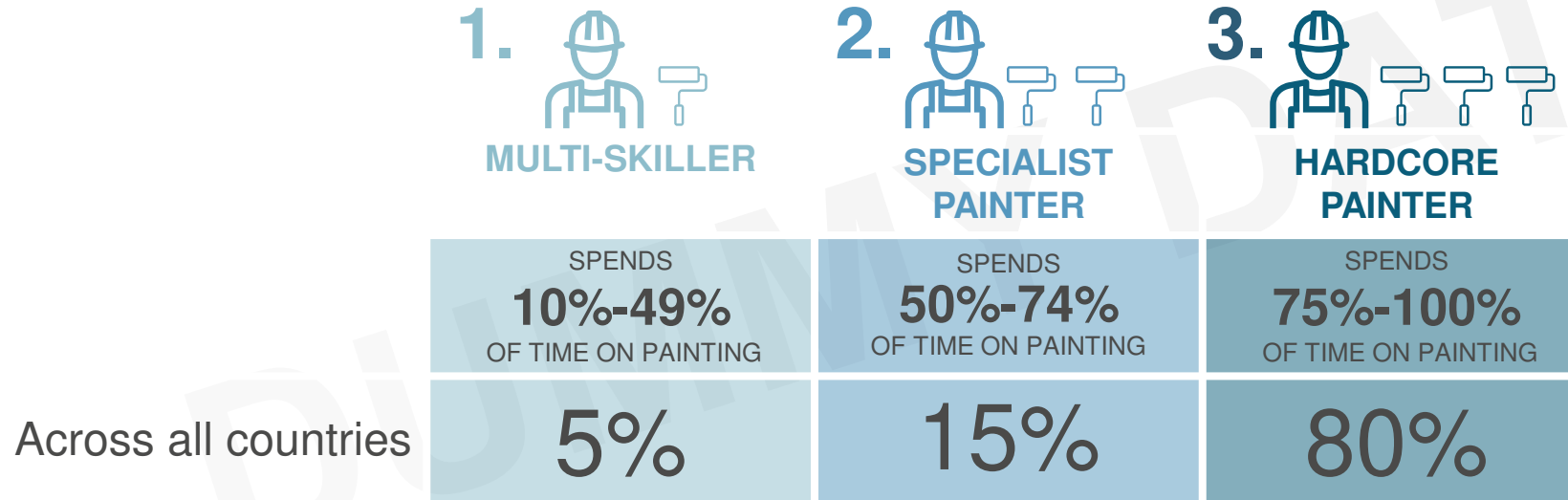


Companies size

Distribution company sizes based on **number of employees**



Painters can be divided into 3 types of specialists:



Belgium	5%	15%	80%
Denmark	5%	15%	80%
France	5%	15%	80%
Germany	5%	15%	80%
Italy	5%	15%	80%
Poland	5%	15%	80%
Spain	5%	15%	80%
Sweden	5%	15%	80%
The Netherlands	5%	15%	80%
United Kingdom	5%	15%	80%

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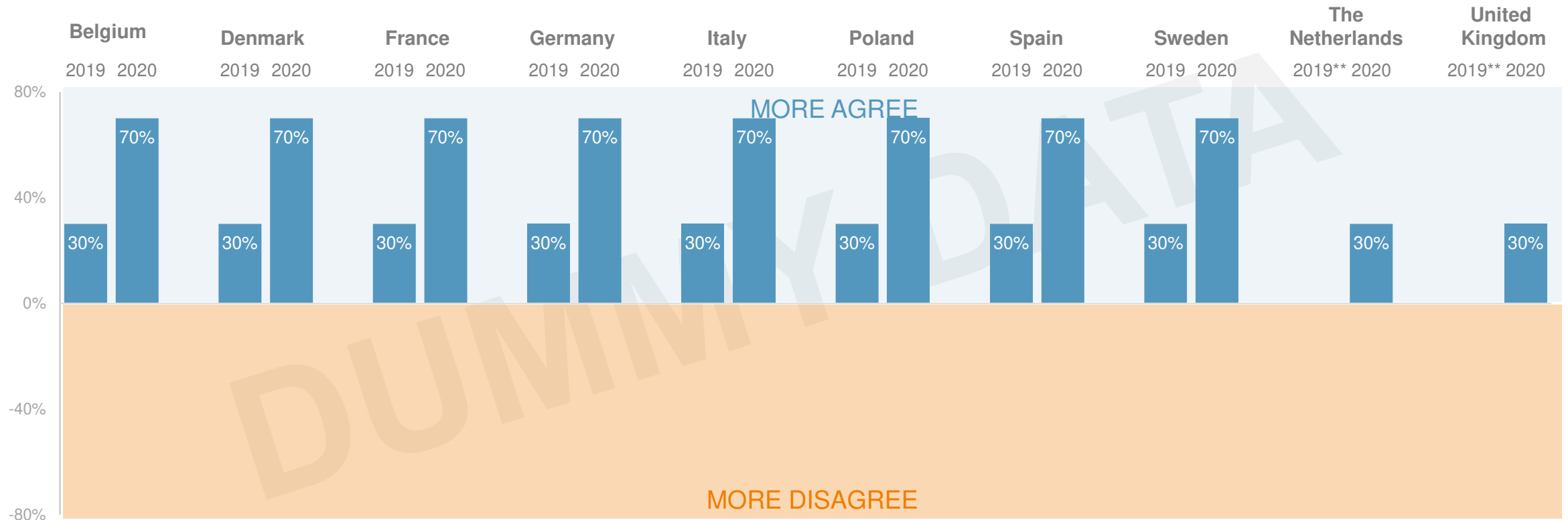


Business expectation for 2020

Statement:

I expect that in 2020 my company will have more paint jobs than in 2019*

(% AGREE minus % DISAGREE)

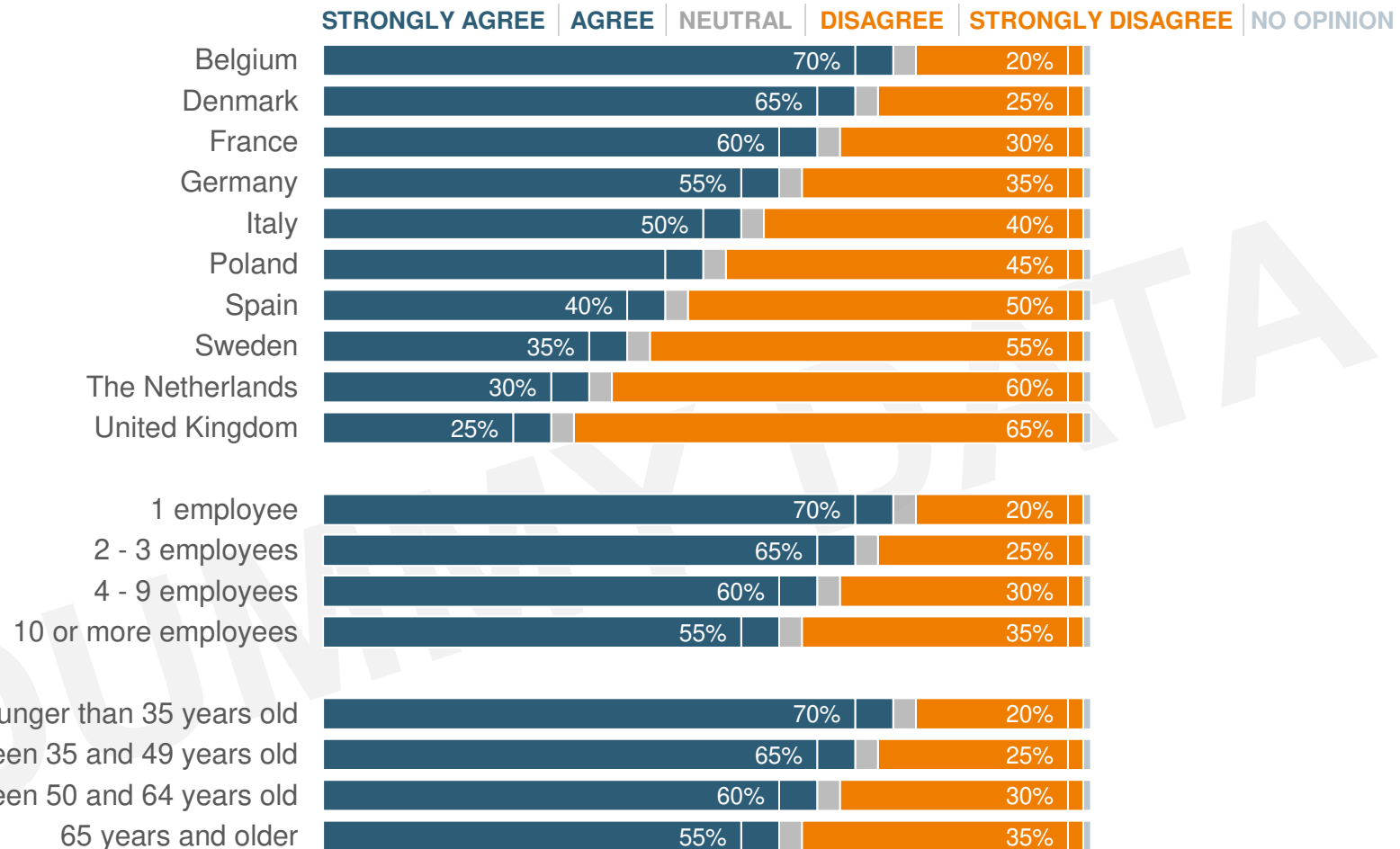


** Question not asked in 2019

Future expectations

Statement:

In 2030, the way in which I run my business will be identical to how this is done right now.



* Results were obtained before any governmental Covid-19-related restrictions were taken.

By 2030, painters will still get jobs mainly via word of mouth

Digital channels (@) are, however, well represented in this list as well.

Future ways of business acquisition (Top-12)

Via which channels do you expect to increasingly acquire new projects in the coming 10 years?

	Total	United Kingdom	Netherlands	Belgium	Germany	Poland	France	Spain	Italy	Denmark	Sweden
Company website @	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%
Existing customers/ network	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
Facebook @	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
Job acquisition platforms @	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
Large contractors	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
LinkedIn @	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Other painters	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
References from manufacturers	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Social media (Instagram, Pinterest...) @	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Website of manufacturer @	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Website of wholesaler @	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Word of mouth	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Don't know	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%

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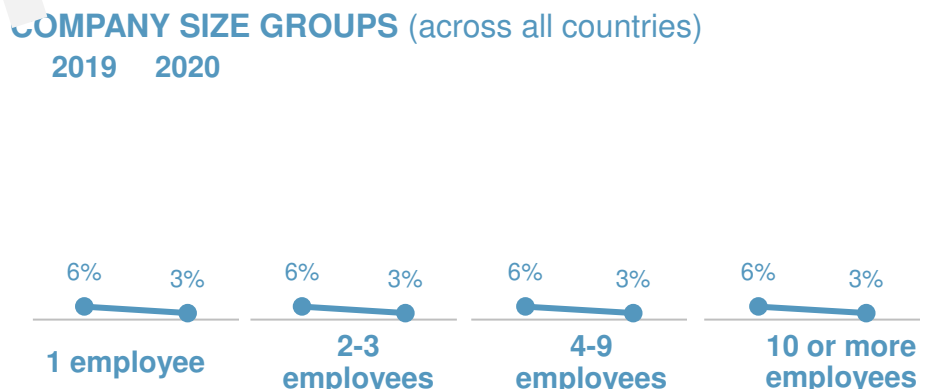
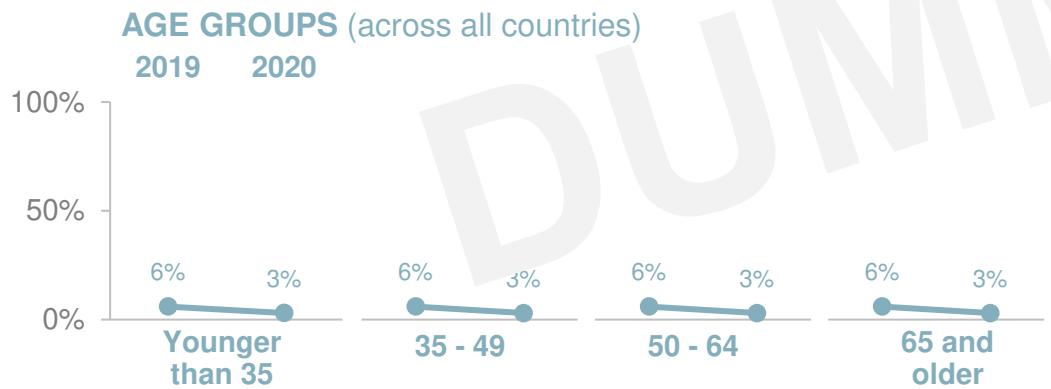
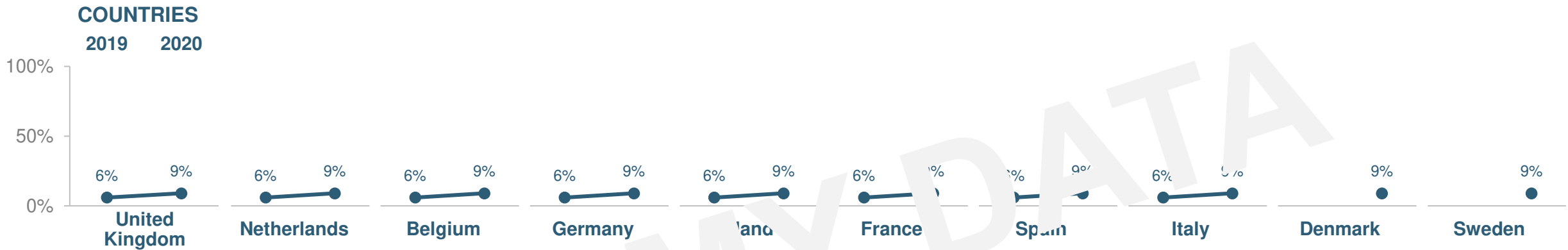
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Online paint buying

Share of online buying – Paints and lacquers

Question: In the last 12 months, what percentage (of the total) did you buy online?

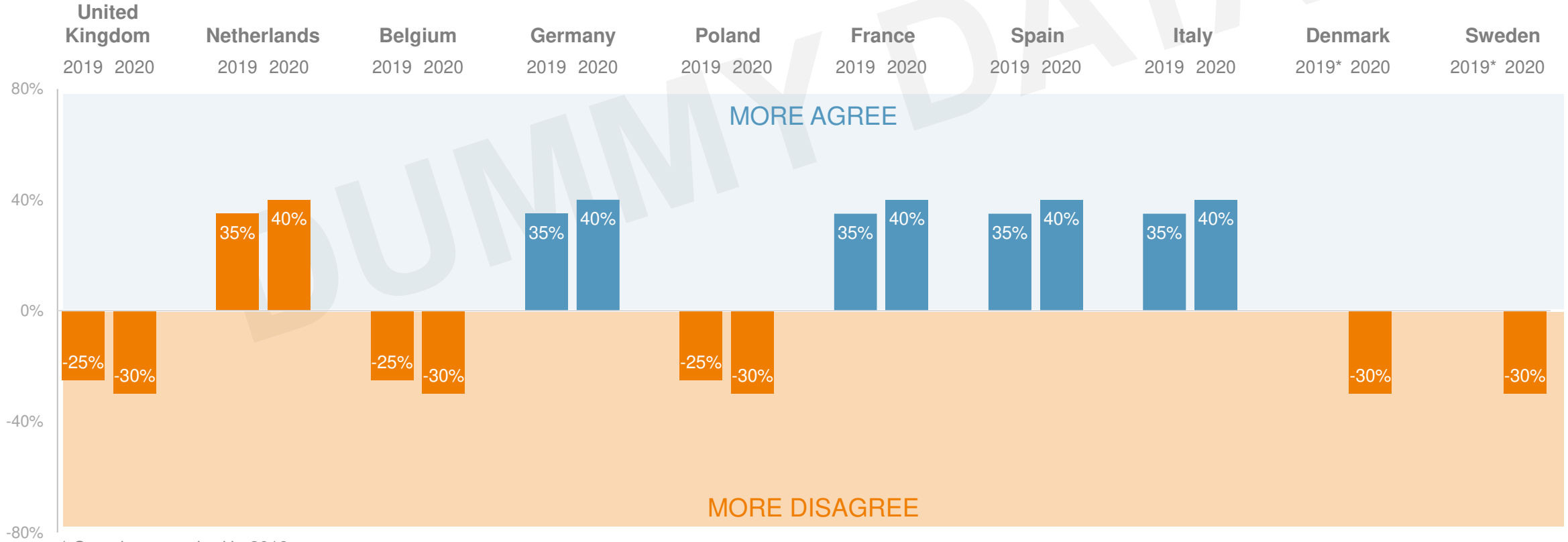


Importance of eco-friendly product for customers...

Demand for **eco-friendly** products by the painter's customer

Statement: *My customer asks me to use environment-friendly products*

(% AGREE minus % DISAGREE)



* Question not asked in 2019

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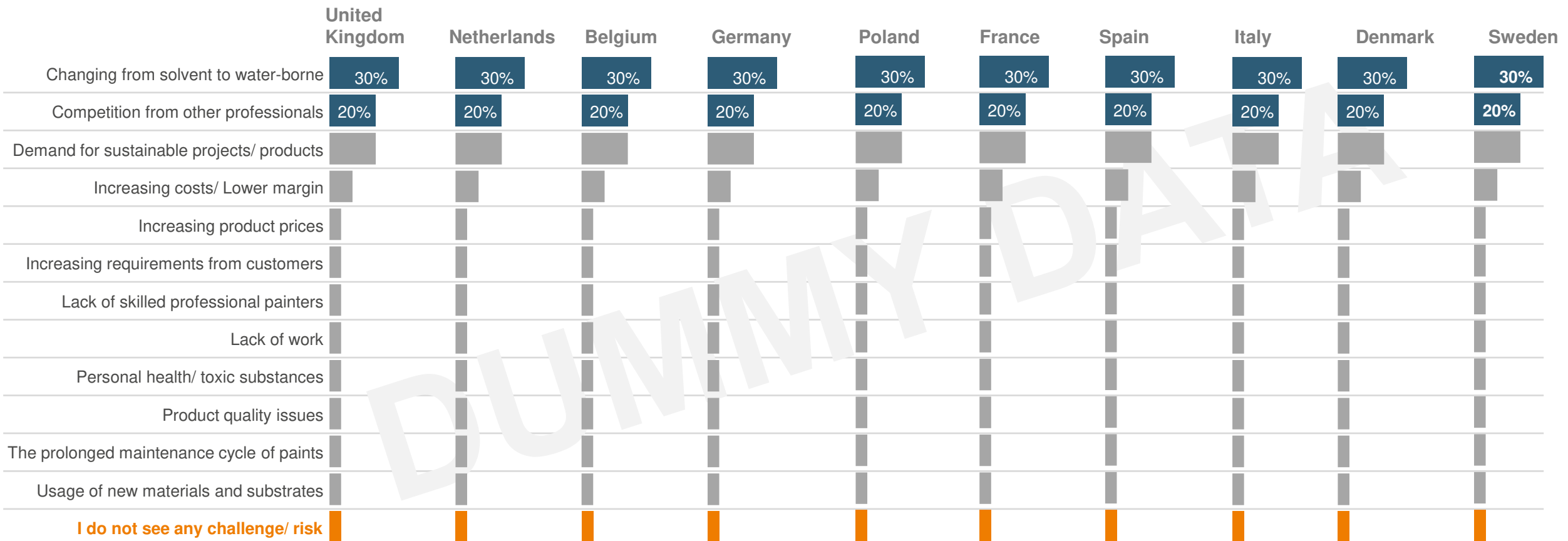
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Expected challenges

Future challenges for professional painters (Top-12)

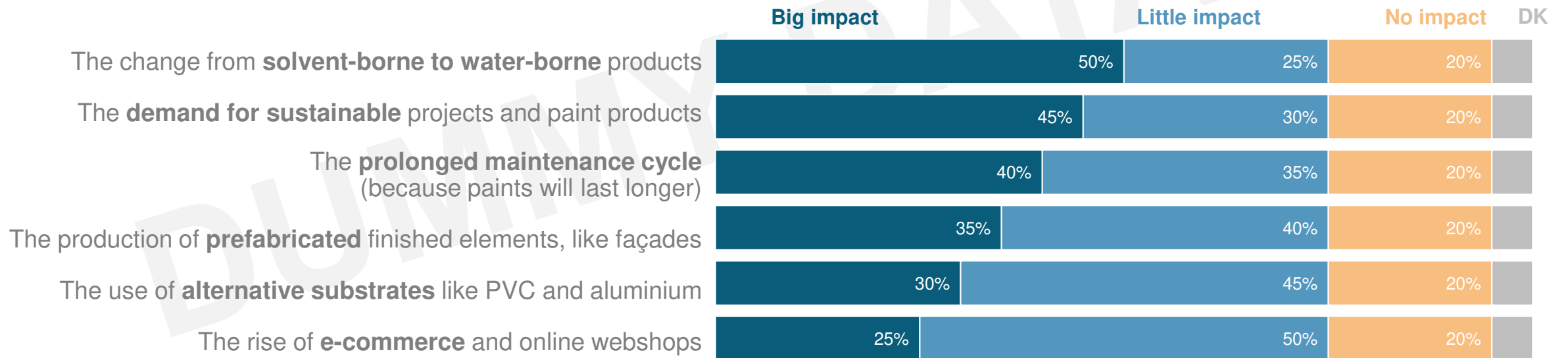
Question: What is the biggest challenge that you as a professional painter will face in the upcoming years?



Expected market trend

Expected impact of 6 key market trends for professional painters*

Question: To what extent do you expect the following trends to impact your profession in the upcoming years?

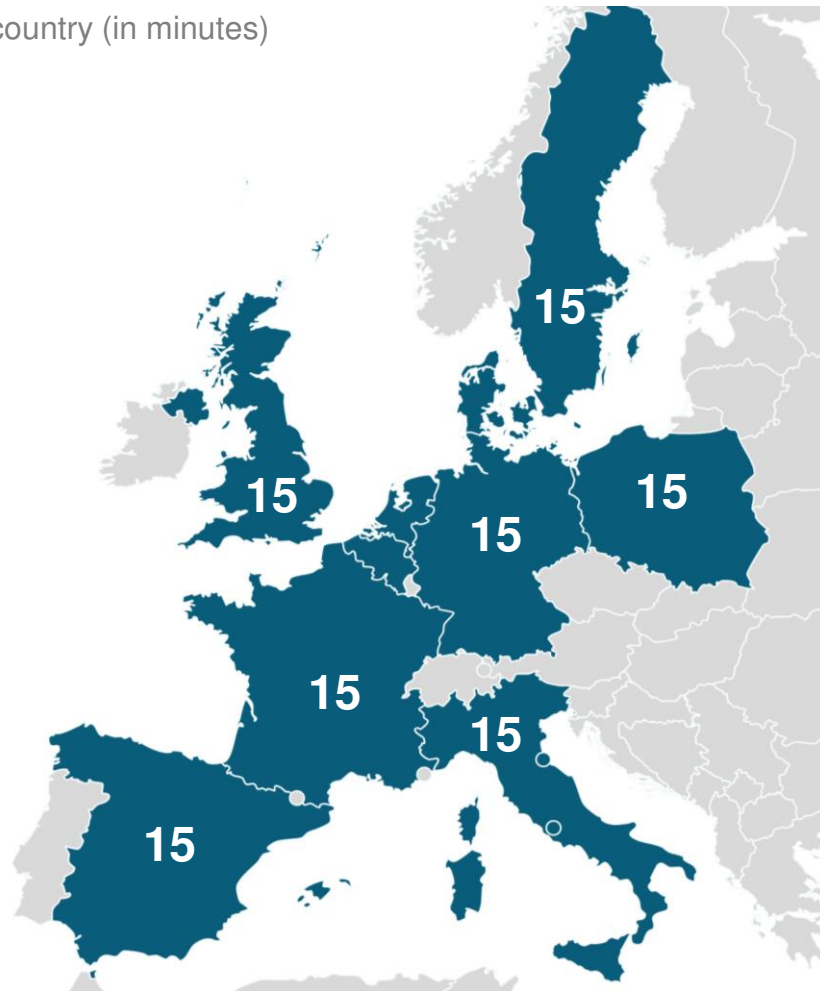


* These specific trends are based on customer input. Score shown is total of all countries; country-splits shown on next slides.

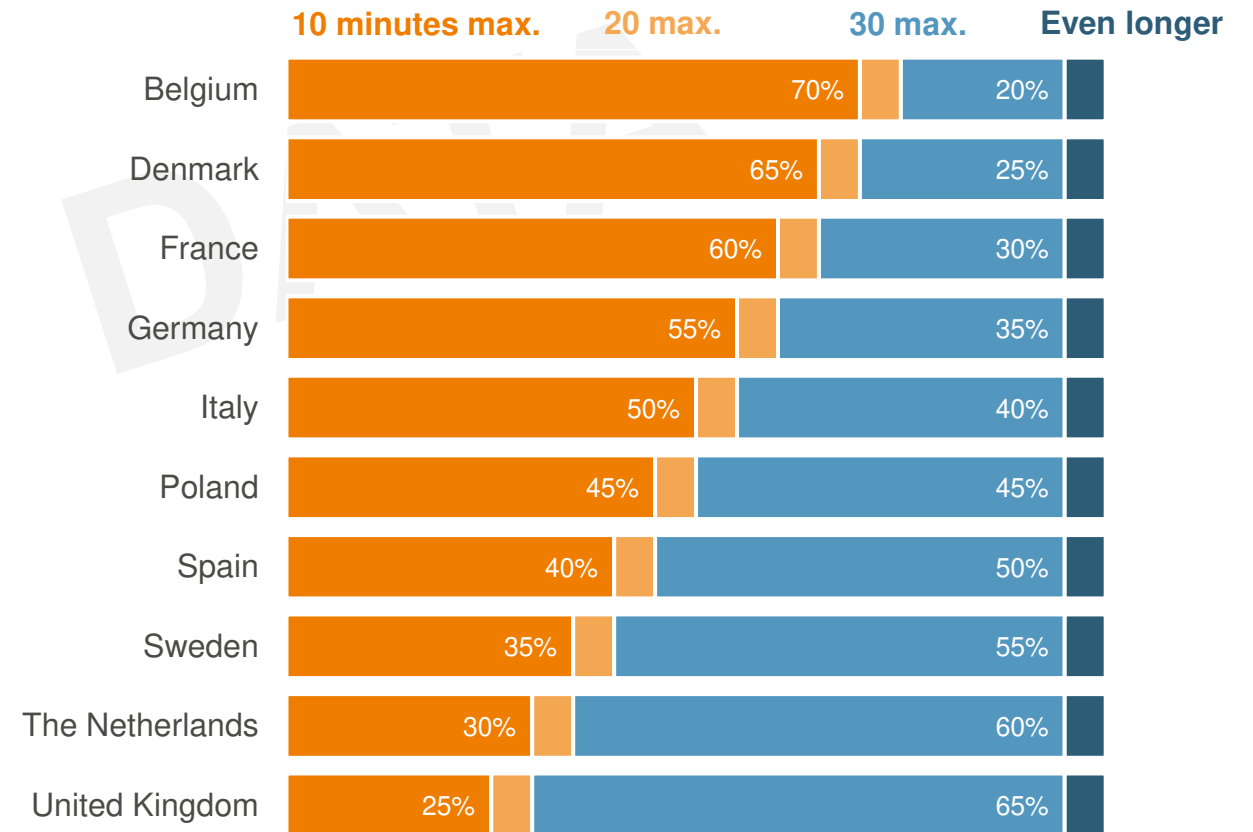
Pick-up distance

Maximum accepted travel time to a physical purchase point

Average per country (in minutes)



Distribution per country



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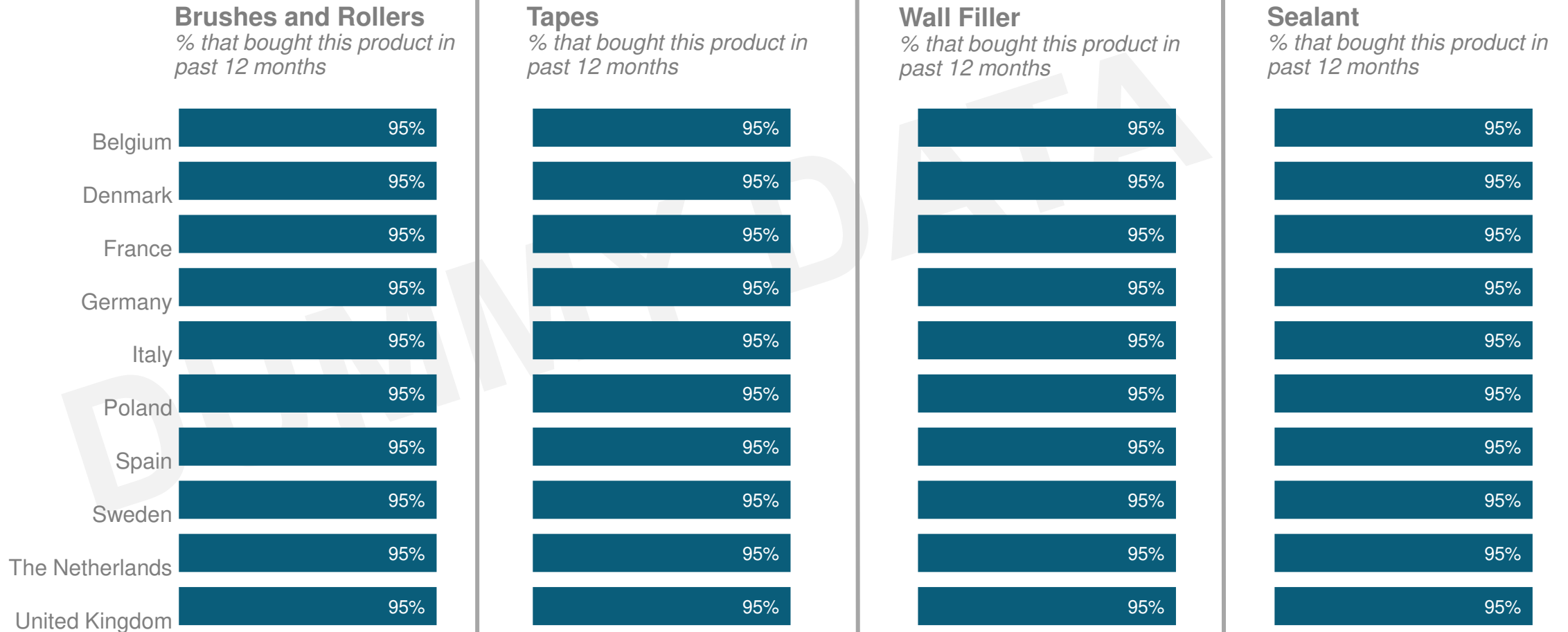
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USAGE OF CONSUMABLES

Question: Did you buy the following products in the past 12 months?



USP Marketing Consultancy

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