



# EUROPEAN HANDYMAN INSIGHT MONITOR

Behavioural segmentation and media usage

Report 2023

A product by **USP** Marketing Consultancy

# European Handyman Insight Monitor

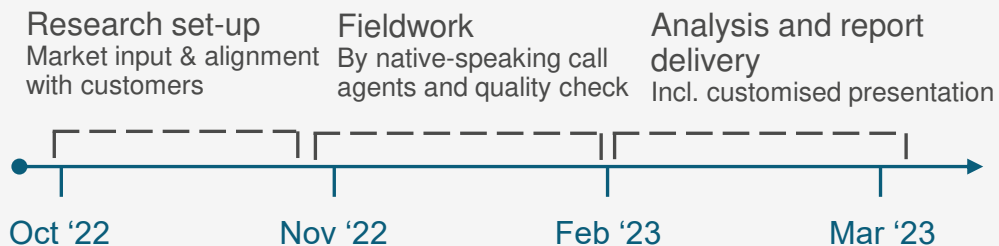
## THE GOAL

The European Handyman Insight Monitor provides key insights that help manufacturers and merchants to understand the business and behaviour of European handymen by means of phone interviews with registered handyman companies across 7 major European markets.

## THE RESEARCH TOPICS 2022-2023

1. Profiling the handymen
2. Media usage
3. Behavioural segmentation

## THE TIMELINE



## COUNTRY SCOPE

(number of interviews conducted)

- UK (133)
- Germany (200)
- The Netherlands (200)
- France (200)
- Spain (200)
- Italy (200)
- Poland (200)



## PROJECT TEAM



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# About target group & methodology



## Surveying handyman companies...

Handymen are a multi-skilled person or small companies that are active in construction, repair and maintenance activities. Interviewed companies have a **maximum of 4 full-time employees** (including the owner) and are **involved in at least 3 building construction activities**.

## ... selected from a country-representative database

The sample for this study is built based on available phone records that are matching the general definition of a 'professional handyman' in each country. These records are bought through sample providers or yellow pages. Respondents are selected randomly from the built-up sample; the interviewed respondents can vary from wave to wave.

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

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

## ... centralised and continuous quality control

Interviews in each country are **monitored by the USP project team** throughout the fieldwork period. We implement our extensive experience in order to make sure the answers are of high quality and provide the insights that meet the goal of the project.



# Handyman Insight Monitor

Management Summary

Profile of the handyman

Professional behaviour

Buying behaviour

Orientation behaviour and media usage



# Management Summary

“USP European Handyman Insights Monitor”



## We know so little about professional handymen

A handyman is broadly defined as a person who is skilled in a variety of general construction, repair and maintenance works and who does this as a profession or as a hobby.

Professional handymen are an important target group in building construction, but because they are part of such a broadly defined population, the professional handyman is hard to define and reach out to.

As a result, professional handymen are a rarely researched target group and very little is known about their business and behaviour.

This monitor aims to solve that by profiling the professional handyman.



## Who are they, and where and how to target them?

Last year’s research’s results indicated the overwhelming diversity among handymen, but above all the lucrative potential due to the large size of this market.

To understand this vast and varying group a bit better, this year’s monitor aimed to segment the handymen in several groups based on their professional and information seeking behaviour and their views on sustainability.

Ultimately, this overview of handyman personas will provide you with a deeper understanding of how to reach, touch and tickle the handyman with your brand message.

# Key insights



## a potentially lucrative group of professionals to target

As a key stakeholder in the XXX market, handymen have XXX across the seven European countries.

They are involved in XXX activities from XXX, meaning they use XXX. On average, handymen buy XXX% of the products they use themselves. This gives them XXX over various products and makes them highly relevant to manufacturers of these products.

### But XXX

This research identified XXX segments of handymen, which are defined by XXX related to topics like XXX.

A highly relevant stakeholder with



XXX

months of fully booked agenda



XXX

activity field



XXX%

of the products are self-purchased

...but XXX

The traditional handyman

The caring handyman

The flexible handyman

The curious handyman

25%

25%

25%

25%

# Key insights

## 2

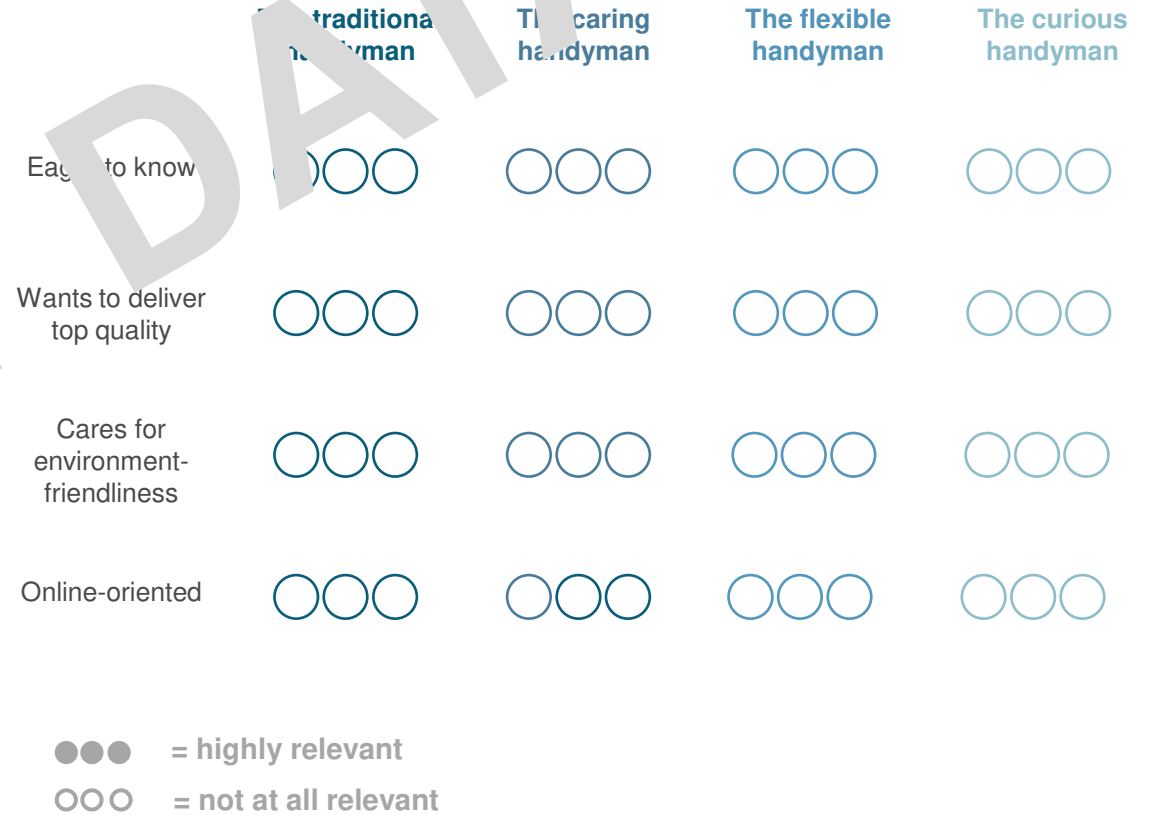
### ...with different XXX

**XXX:** As the level of professional experience differs slightly per segment, interest in news and developments also differs. That is why some actively search for information more than others.

Also, some care about a certain aspect more than others. All handymen care about XXX, for instance, but some care about XXX. On other aspects, like the XXX, differences are even larger.

**XXX:** Additionally, the type of media channels the handymen use can also differ per segment. XXX are more likely to use XXX than the traditional and the caring ones, for instance.

That is why it is important to read on for more extensive knowledge that can provide a better understanding of the subtle or more obvious differences between segments in different areas.



# Handyman Insight Monitor

Management Summary

Profile of the handyman

Segmentation

Professional behaviour

Buying behaviour

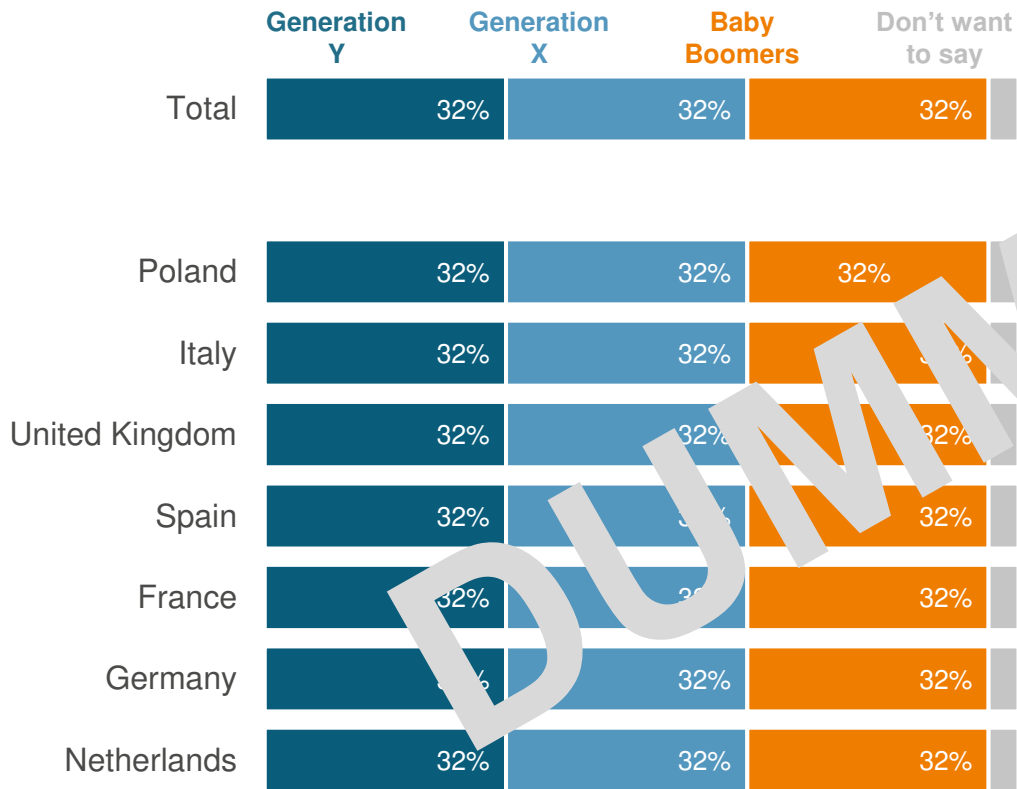
Orientation behaviour and media usage



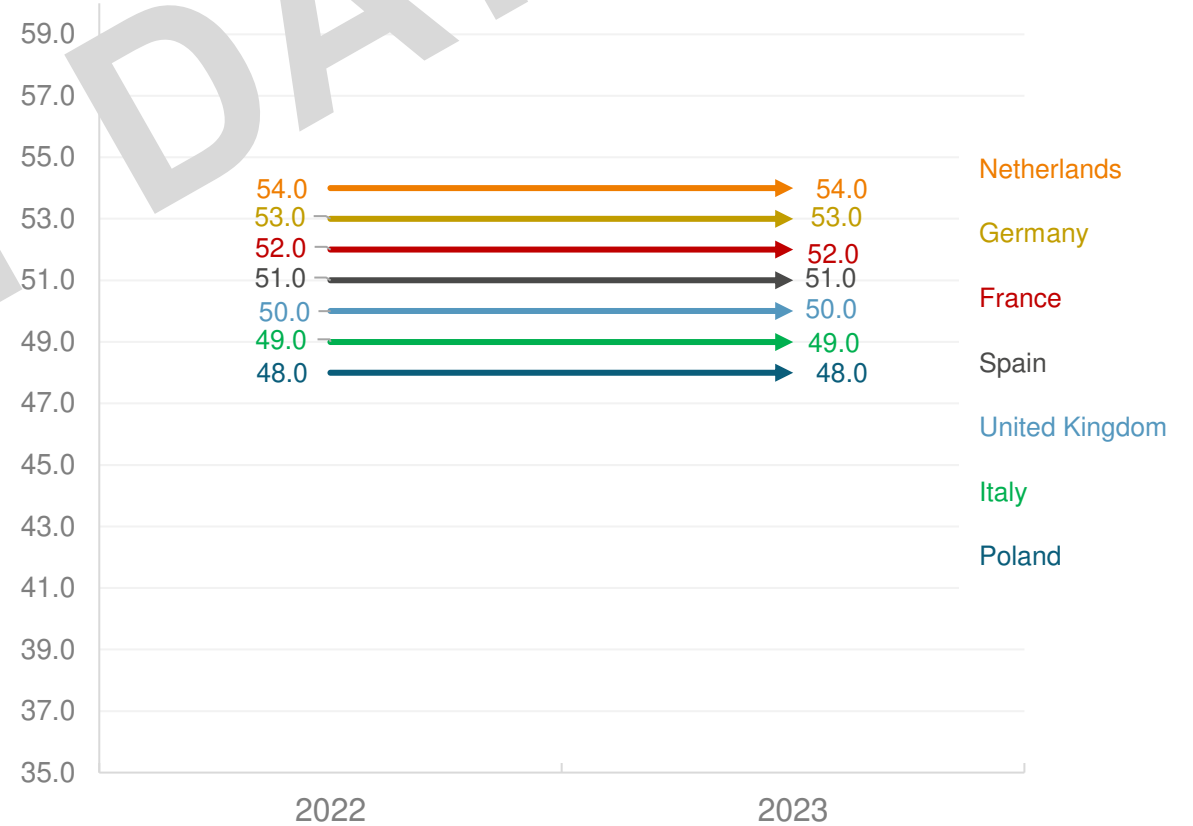


Age distribution in 2023

Q:May I please note your age?



Age trend 2022-2023

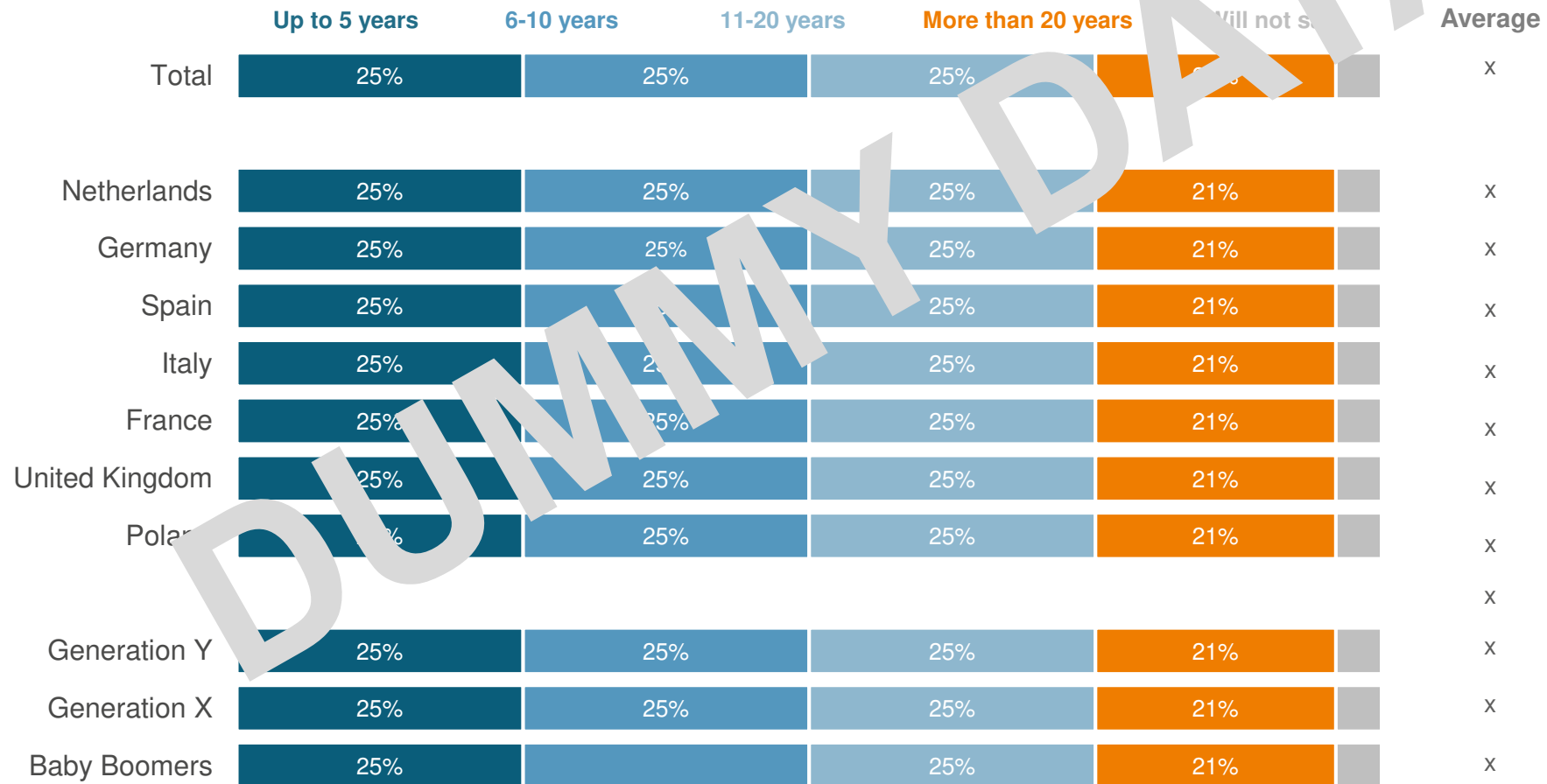


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### Years of experience in 2023

Q: How many years of experience do you have as a professional handyman?

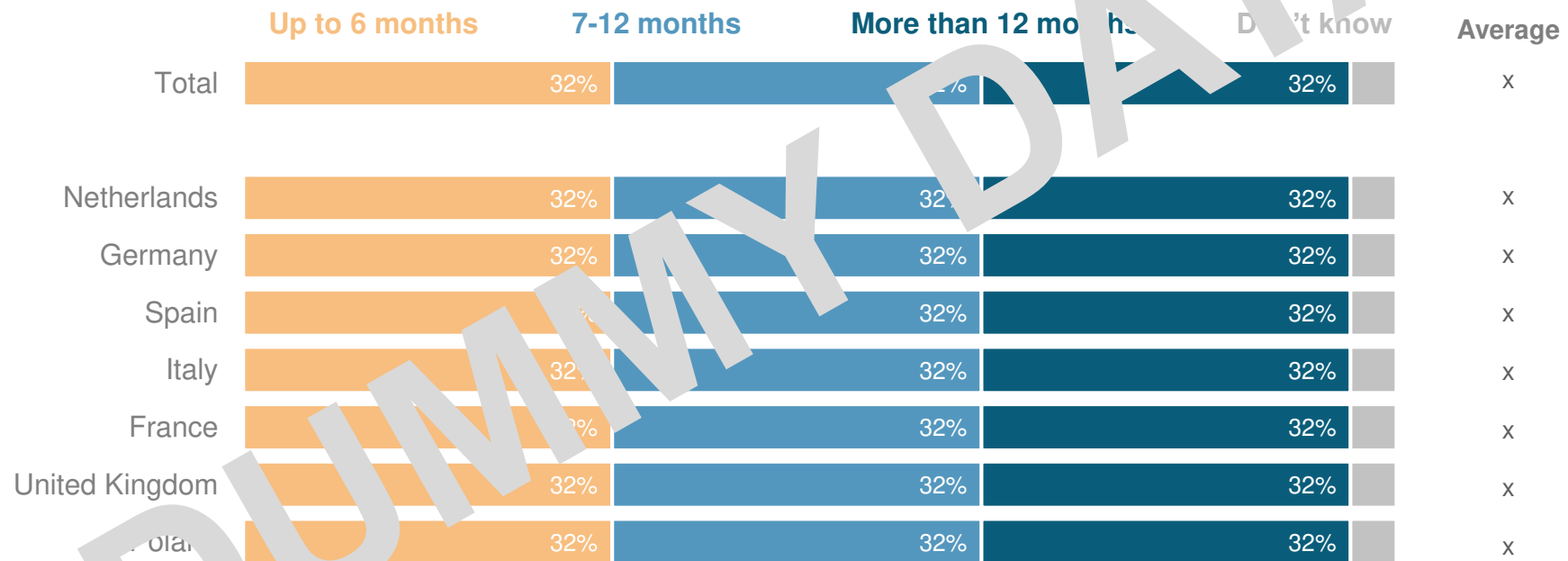


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### Size of portfolio in months

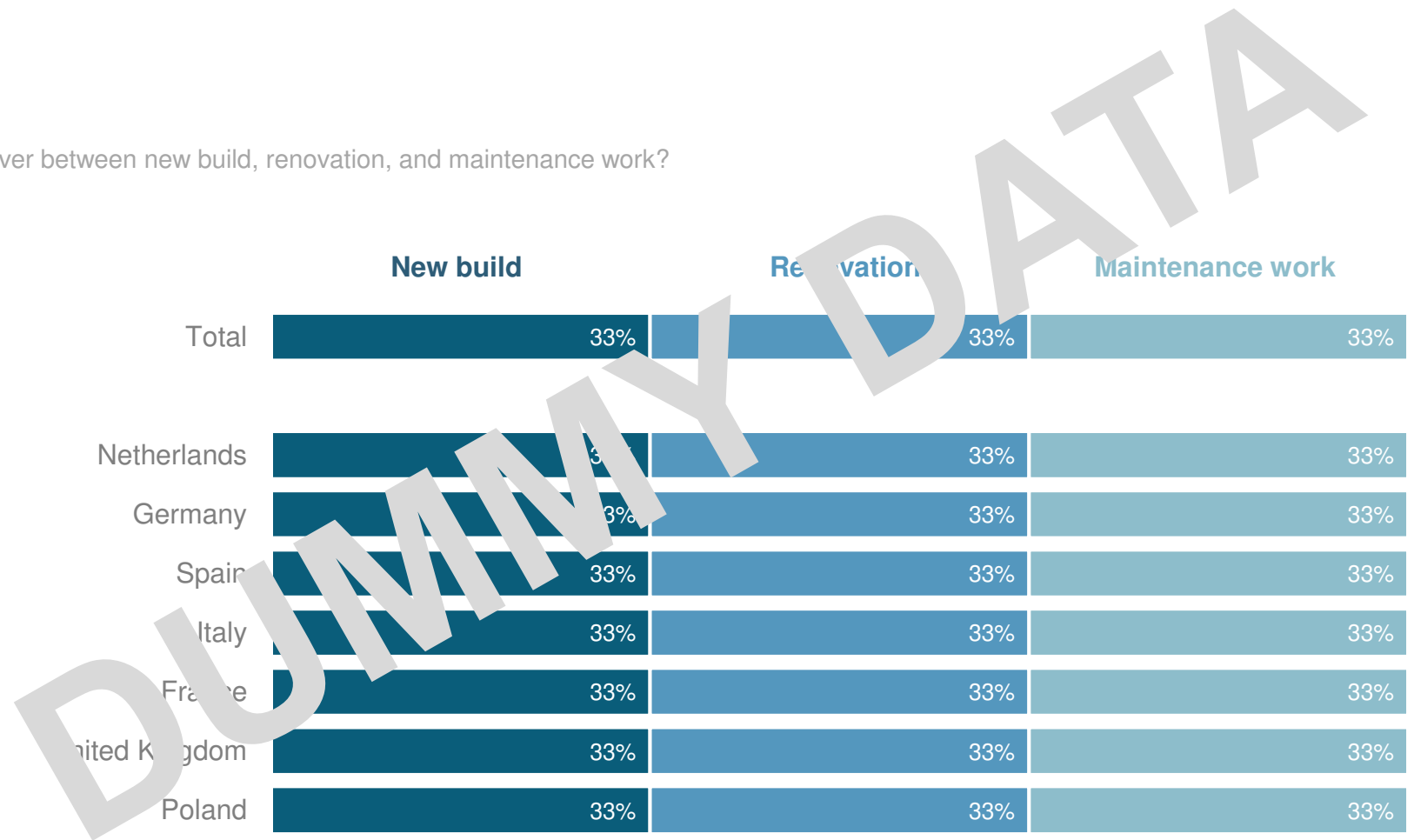
Q: How big is your current order book portfolio in months?



...

**Type of projects**

Q: Can you divide your turnover between new build, renovation, and maintenance work?





...

...

**Provided services - Installation**

Q: How often does your company do the following installation and repair jobs?

**At least once a week**

**At least once a month**

**At least once in three months**

**At least once in six months**

**We do not provide these services**

**Plumbing**

**Electrical work**

**HVAC**

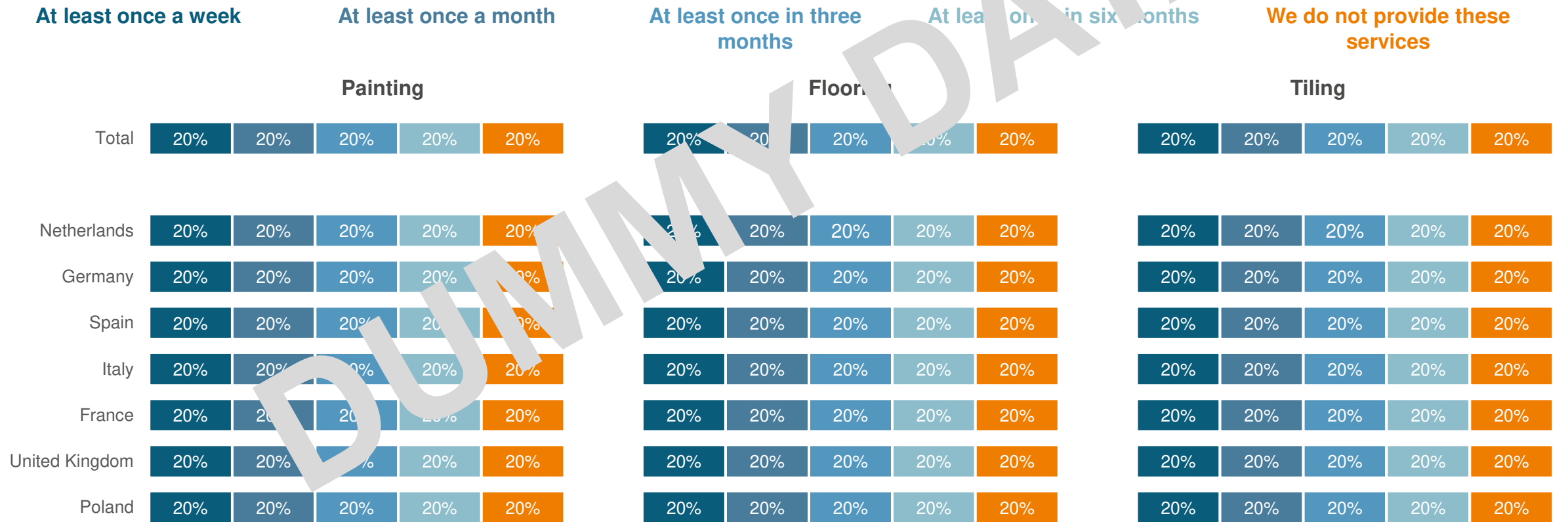


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**Provided services - Finishing**

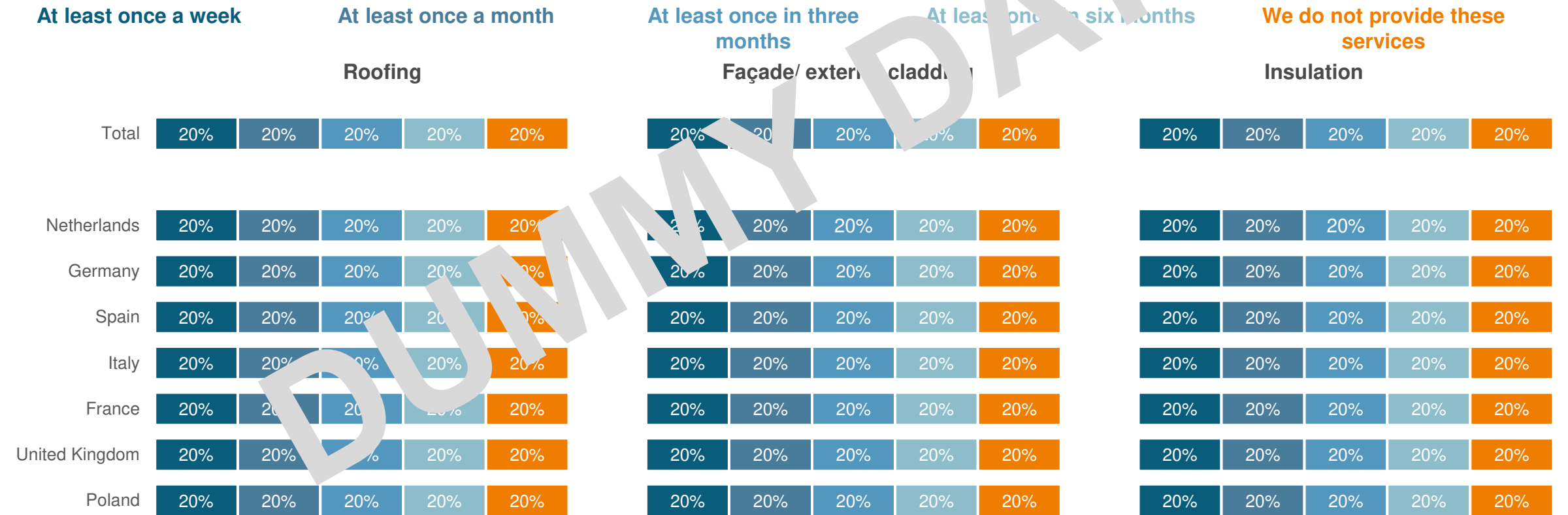
Q: How often does your company do the following installation and repair jobs?



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**Provided services – Building shell construction**

Q: How often does your company do the following installation and repair jobs?

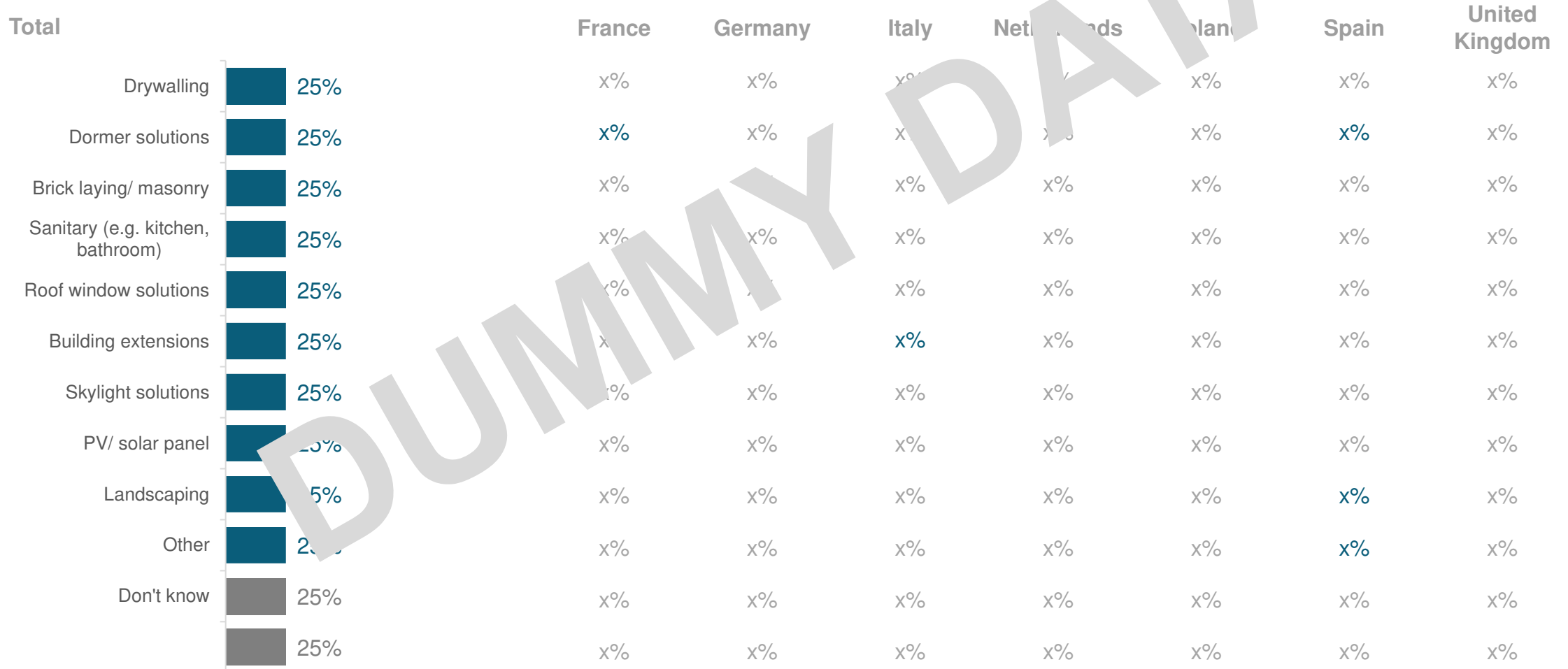


...

...

**Other provided services**

Q:What other types of installation and repair jobs does your company do?





# Handyman Insight Monitor

Management Summary

Profile of the handyman

**Segmentation**

Professional behaviour

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Orientation behaviour and media usage



# Introduction to Behavioural Segmentation of Handymen

Going beyond traditional segmentation focusing on demographics and firmographics, behavioural segmentation enables understanding handymen **XXX**, using insights derived from their actions like orientation and purchasing behaviour or response to a product, service or trend.

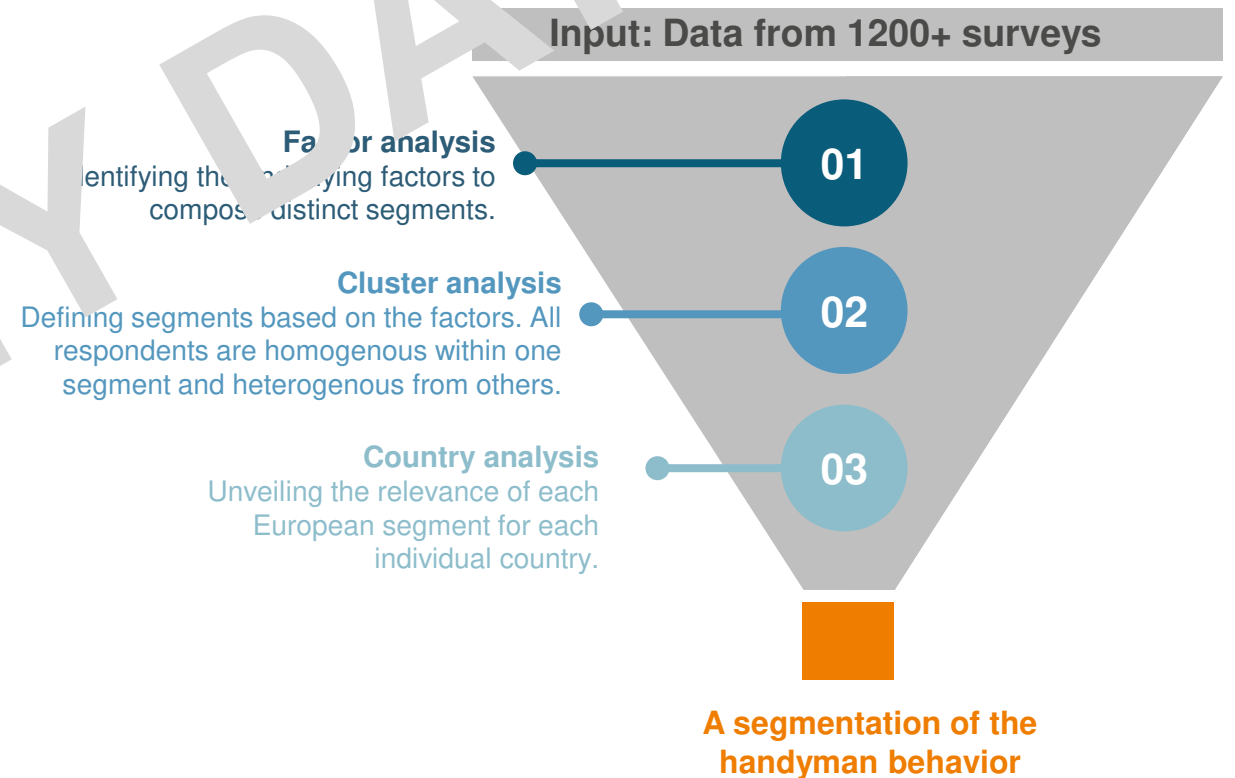
The objective is to identify customer segments that **enable you to understand how to address the particular needs or desires** of a group of handymen and **discover opportunities to optimise their customer journeys**.

Before we distinguish different segments of handymen in the following, it is important to note that the **segmentation is based on a certain set of behavioural statements** that are identified through statistical analysis.

Therefore, it is also important to note that there are some overlaps between categories and that certain aspects are the same for all. In each segment, the **XXX**

That decision power makes this a **potential lucrative group of professionals** to target. The **subtle or more obvious differences** between the following segments will provide insights that **will help find the best way to reach, touch and entice** the handymen with your brands and products.

How we do this segmentation:



# The traditional handyman

## Personification of segment:

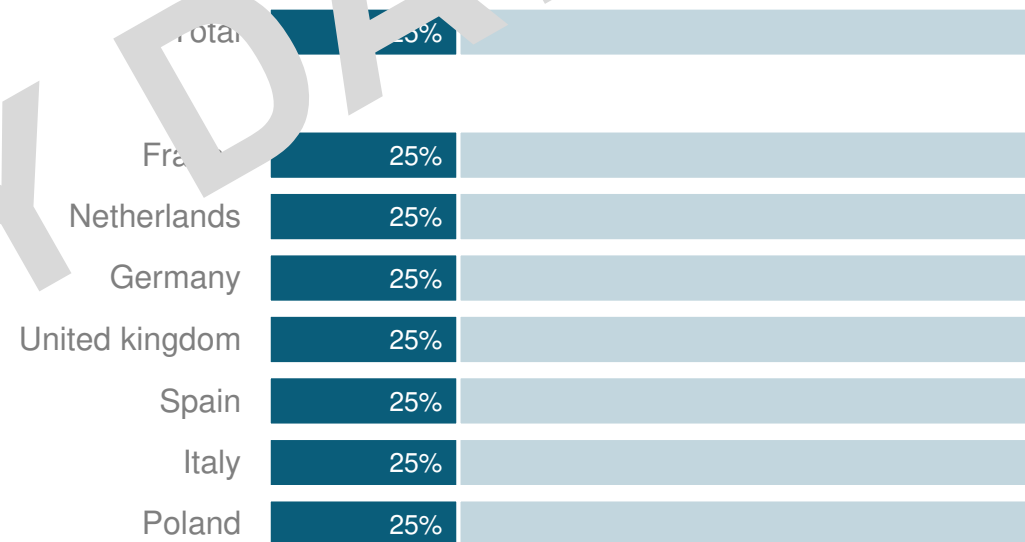
With an average age of XXX, the traditional handyman is slightly older than the others. Also, he has slightly **XXX**, and rely on experience he does.

The traditional handyman uses his experience to provide his clients with advice beyond what is expected and to do a neat and tidy job. Basically, the traditional handyman **XXX**, using XXX that guarantee XXX. **XXX**, for which the traditional handyman shows less interest.

Given his experience, he **XXX**. Consequently, he rarely follows **XXX** and does XXX search for information much. Although he does use the **XXX** on occasion, he barely uses XXX media and you will rarely find him marketing his business online. **XXX**.

## Relevance of segment:

Share of all local handyman companies



DUMMY DATA

# The caring handyman

## Personification of segment:

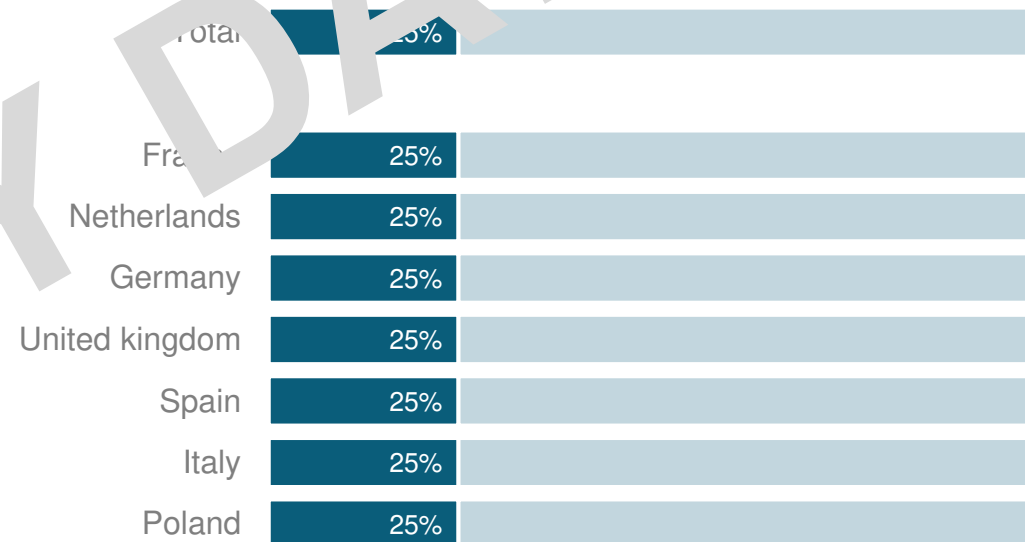
The caring handyman shares quite a few characteristics with the traditional one. He is also slightly **XXX** and slightly **XXX** and **not really XXX**. Like the traditional handyman, the caring handyman focuses on relatively few activities and strives to do them in the best possible way.

Unlike the traditional handyman, however, the best possible way is not necessarily the way he has always done it. That is why **the caring handyman XXX**.

The caring handyman **cares for using XXX the most**. In addition to **caring for XXX**, the caring handyman seriously **cares for the XXX impact** of his work, meaning he is most likely to buy and promote XXX products, even if they are more expensive.

## Relevance of segment:

Share of all local handyman companies





# The flexible handyman

## Personification of segment:

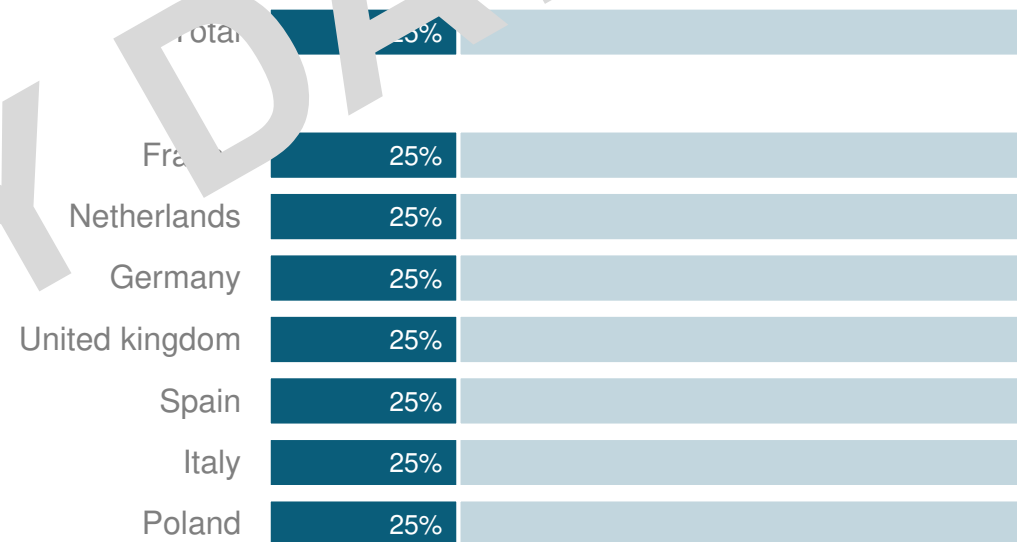
The flexible handyman is a bit **XXX** than the caring and traditional handymen, but actually offers a wider variety of jobs and activities and is **more likely XXX**. This makes him a rather busy XXX that mainly wants to get the job done according to the clients' wishes and standards.

Compared to the others, the flexible handyman XXX and is slightly less likely to buy the materials and products himself. Although he is **slightly less interested in XXX**, he does **care XXX**. Also, he is more likely to use **XXX** and may even buy some online.

Given the variety of his activities, the flexible handyman uses **XXX** to stay informed on all of them, he uses **XXX**, such as, **the flexible handyman is much more XXX** than the caring and traditional handymen.

## Relevance of segment:

Share of all local handyman companies



# The curious handyman

## Personification of segment:

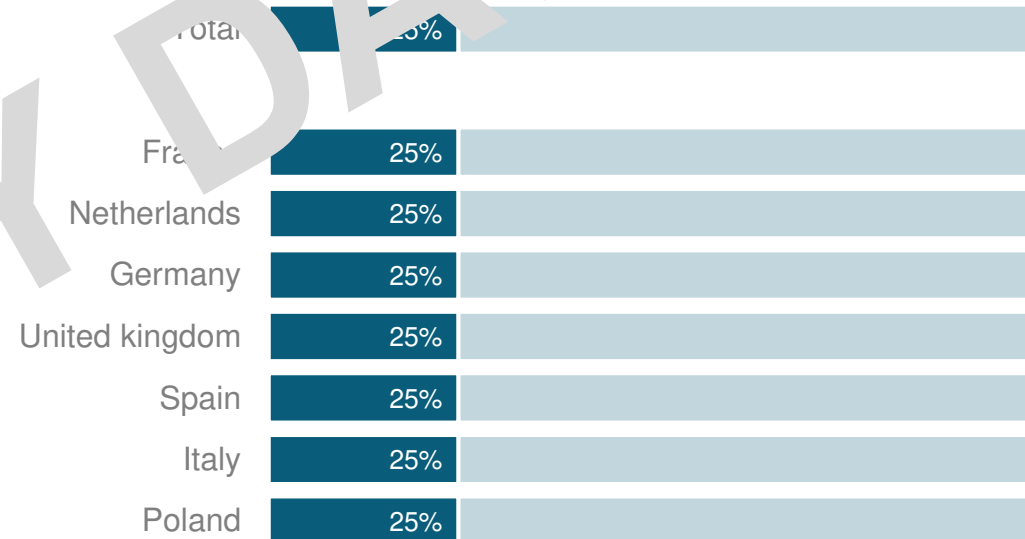
Consisting of about **a third of the entire population of handymen**, the curious handymen form the largest group. The curious handyman performs **XXX**, which includes the most **XXX** work of all handyman groups.

Like the flexible handyman, the curious handyman is a bit **XXX**. He does offer more extensive advice to his clients, however, and **cares more about and XXX**. What the curious handymen **care less for XXX** and they are even less willing to pay for **XXX** than the traditional handymen.

The curious handyman truly **stands out with XXX** of **XXX**. He **XXX** the **XXX** in the market the most and is most likely to **XXX** **XXX**, **XXX** to stay up to date. **His XXX** compared to other groups.

## Relevance of segment:

Share of all local handyman companies



# The XXX handyman represents the largest, whereas the XXX handyman represents the smallest population of handymen

## There are, of course, clear country differences:

More than half of XXX handymen belong to the curious handyman group. XXX and XXX handymen populations are also dominated by curious handymen, but flexible handymen also occupy a substantial share of them. XXX handyman population is quite heterogeneous, with the curious handymen being the largest group. The XXX' handyman population is also relatively diverse, except that the caring handymen are quite a minority. XXX handymen stand out with the largest population of flexible handymen and the smallest population of the traditional group. The largest population of traditional and caring handymen can be found in XXX.

### European map out

[Distribution of the segments across countries]

	The traditional handyman	The caring handyman	The flexible handyman	The curious handyman
Total	25%	25%	25%	25%
United Kingdom	25%	25%	25%	25%
Italy	25%	25%	25%	25%
Spain	25%	25%	25%	25%
Germany	25%	25%	25%	25%
Netherlands	25%	25%	25%	25%
Poland	25%	25%	25%	25%
France	25%	27%	25%	25%

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Profile of the handyman

Segmentation

**Professional behaviour**

Buying behaviour

Orientation behaviour and media usage

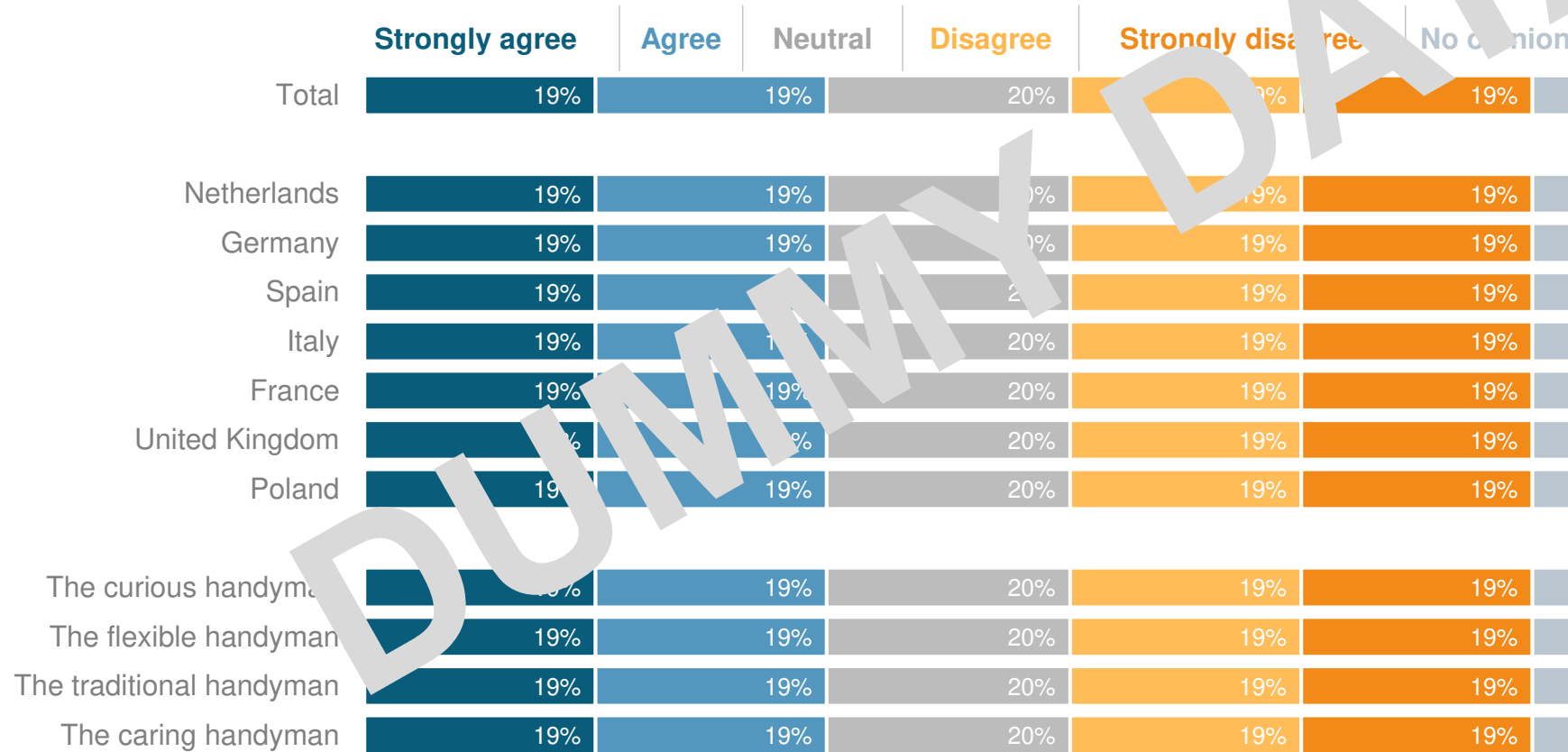


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**STATEMENT**

“I market my business through online platforms”



...

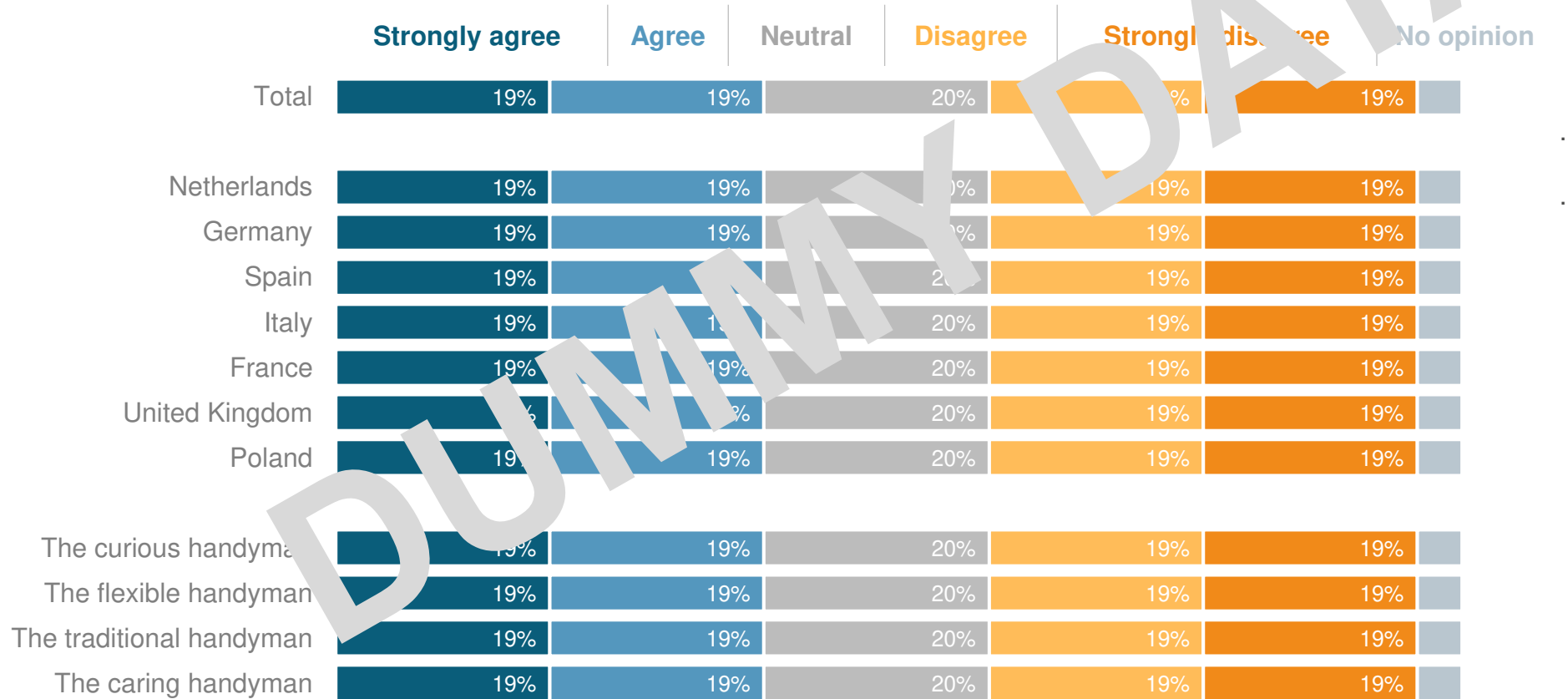
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...

**STATEMENT**

“I often advise my clients or colleagues to use environment-friendly products”

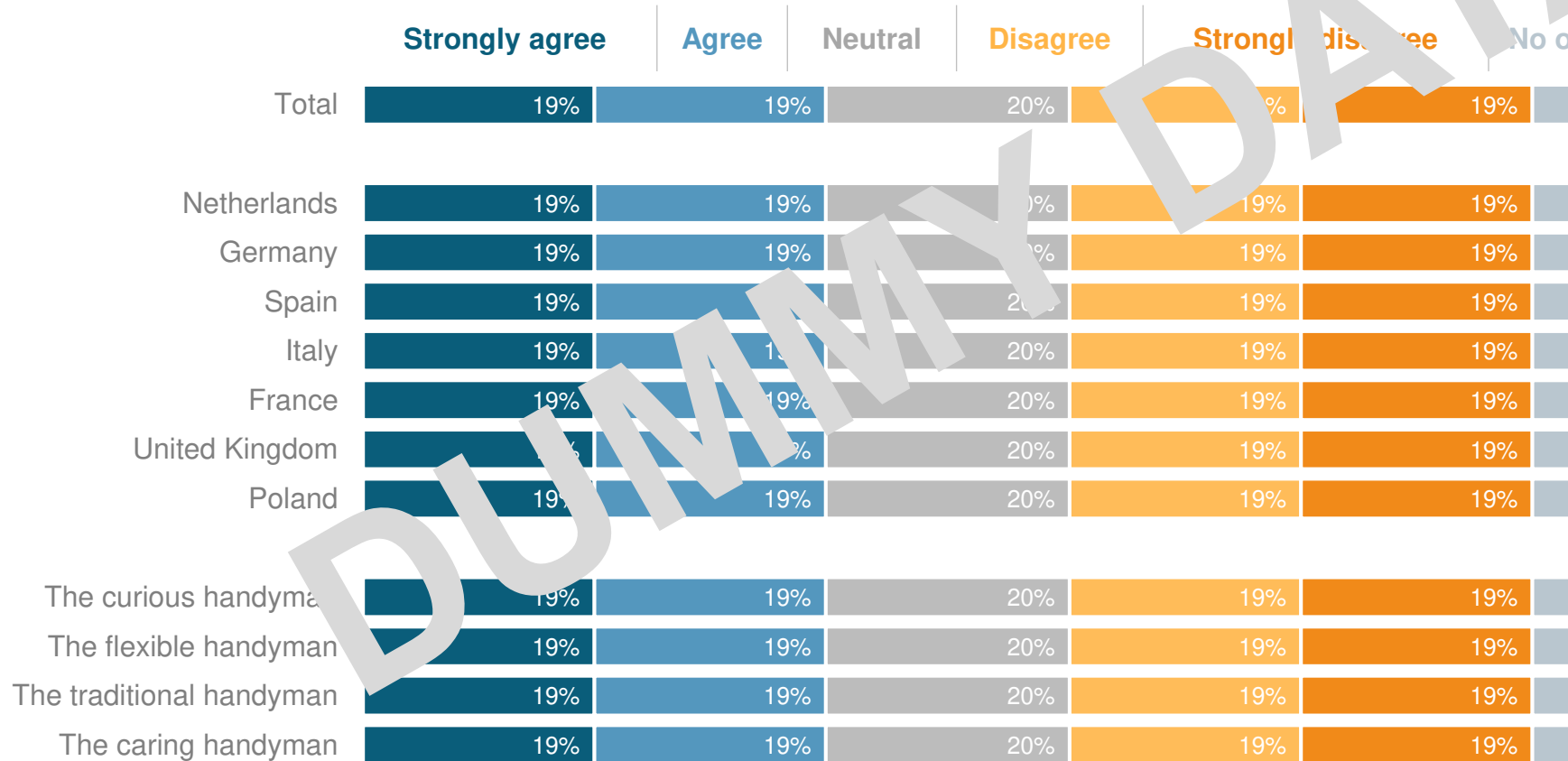


...

...

**STATEMENT**

“I always offer my customers advice that goes beyond what is expected of me”



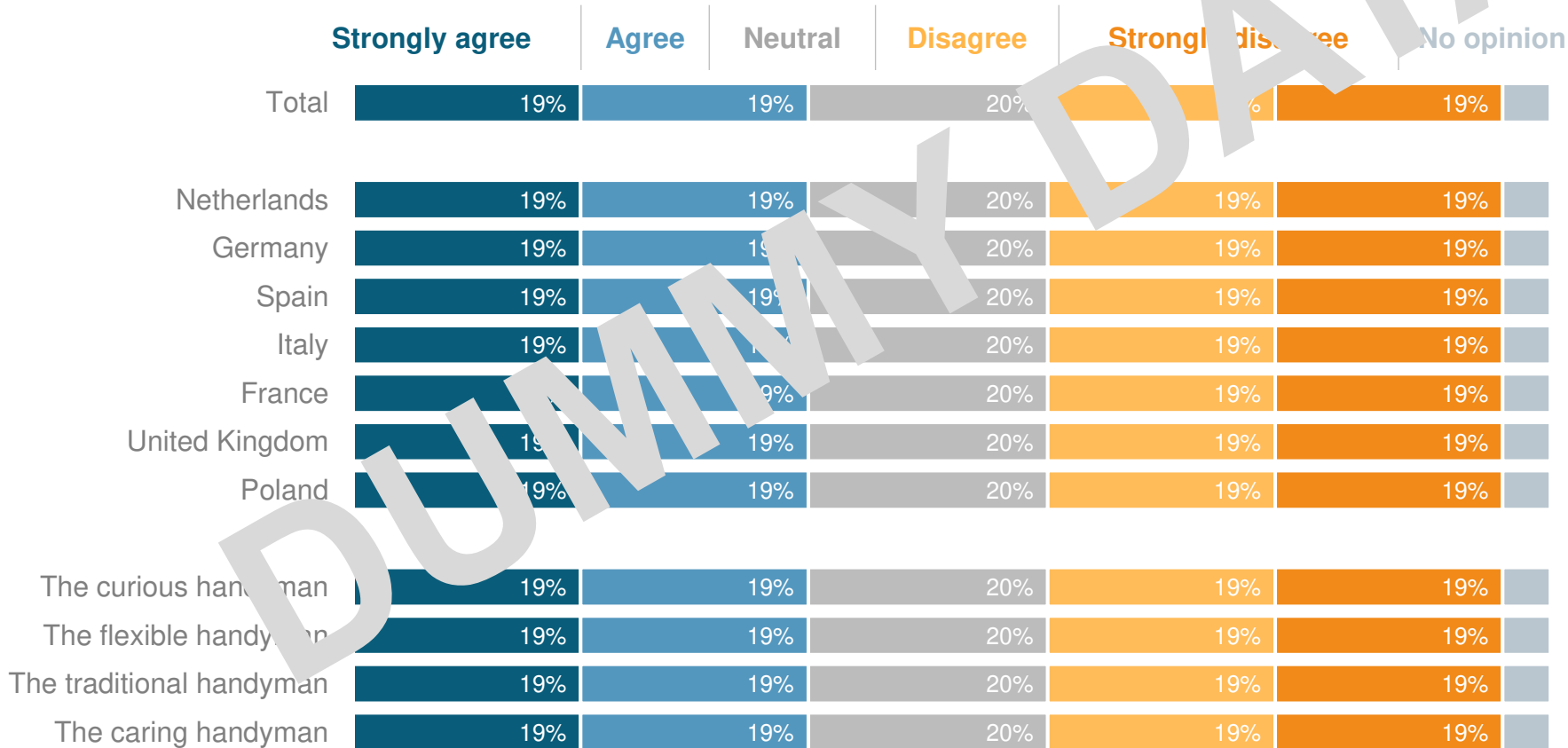


...

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**STATEMENT**

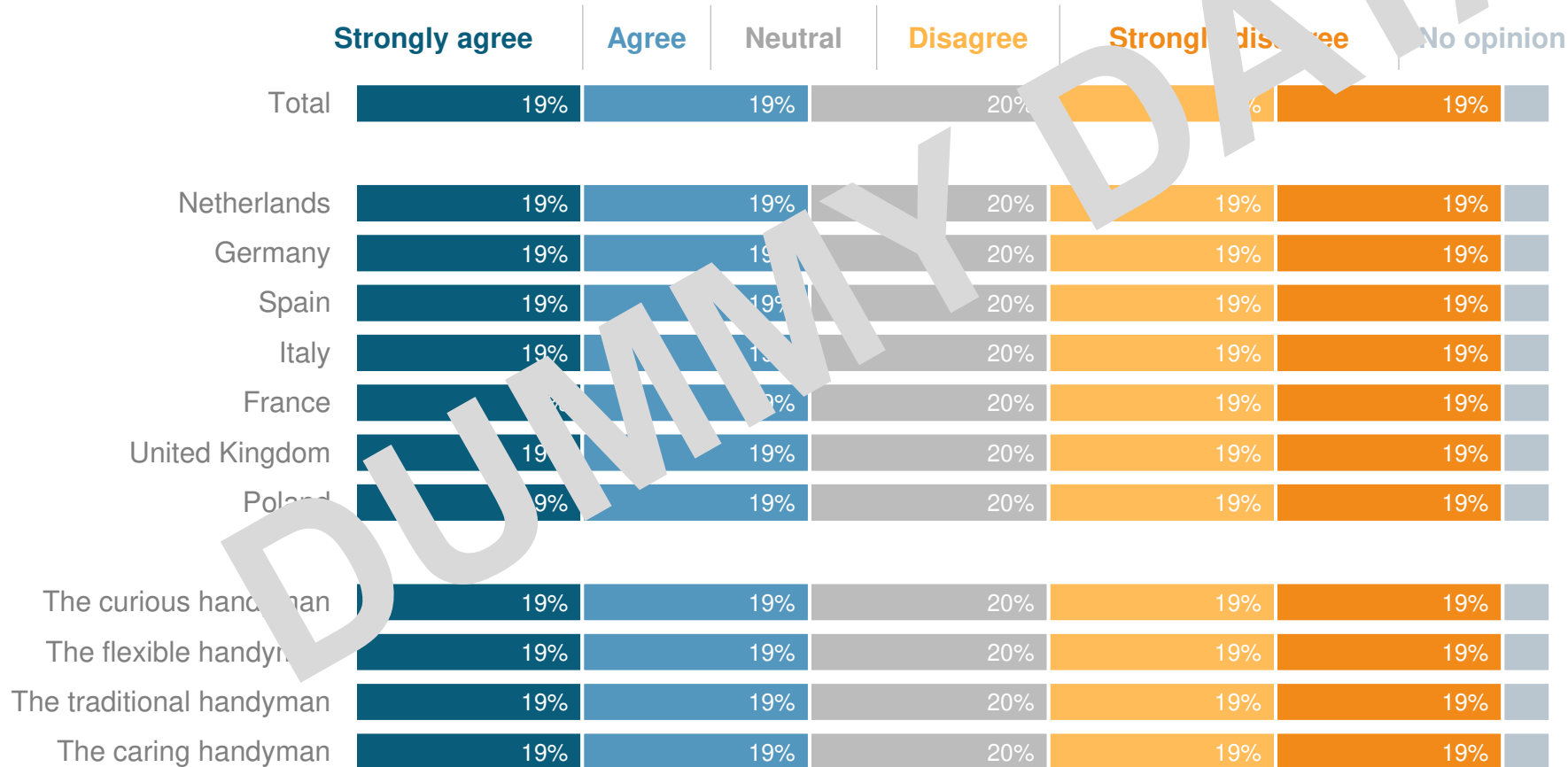
“I always use products that I have experience with”



...

**STATEMENT**

“I often recycle the products and tools that I use”

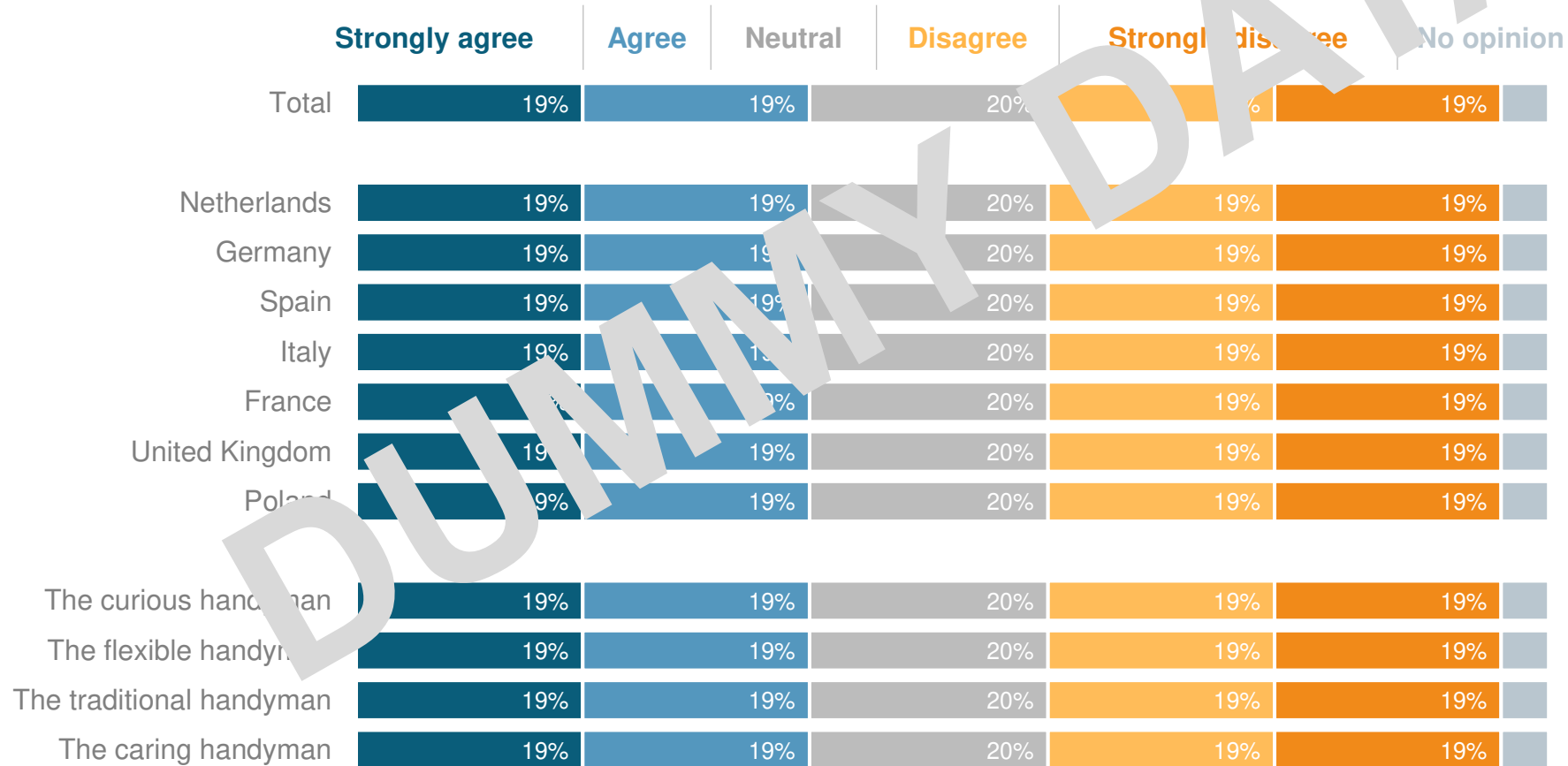


...

...

**STATEMENT**

“I always use the appropriate Personal Protective Equipment (PPE) for each activity”

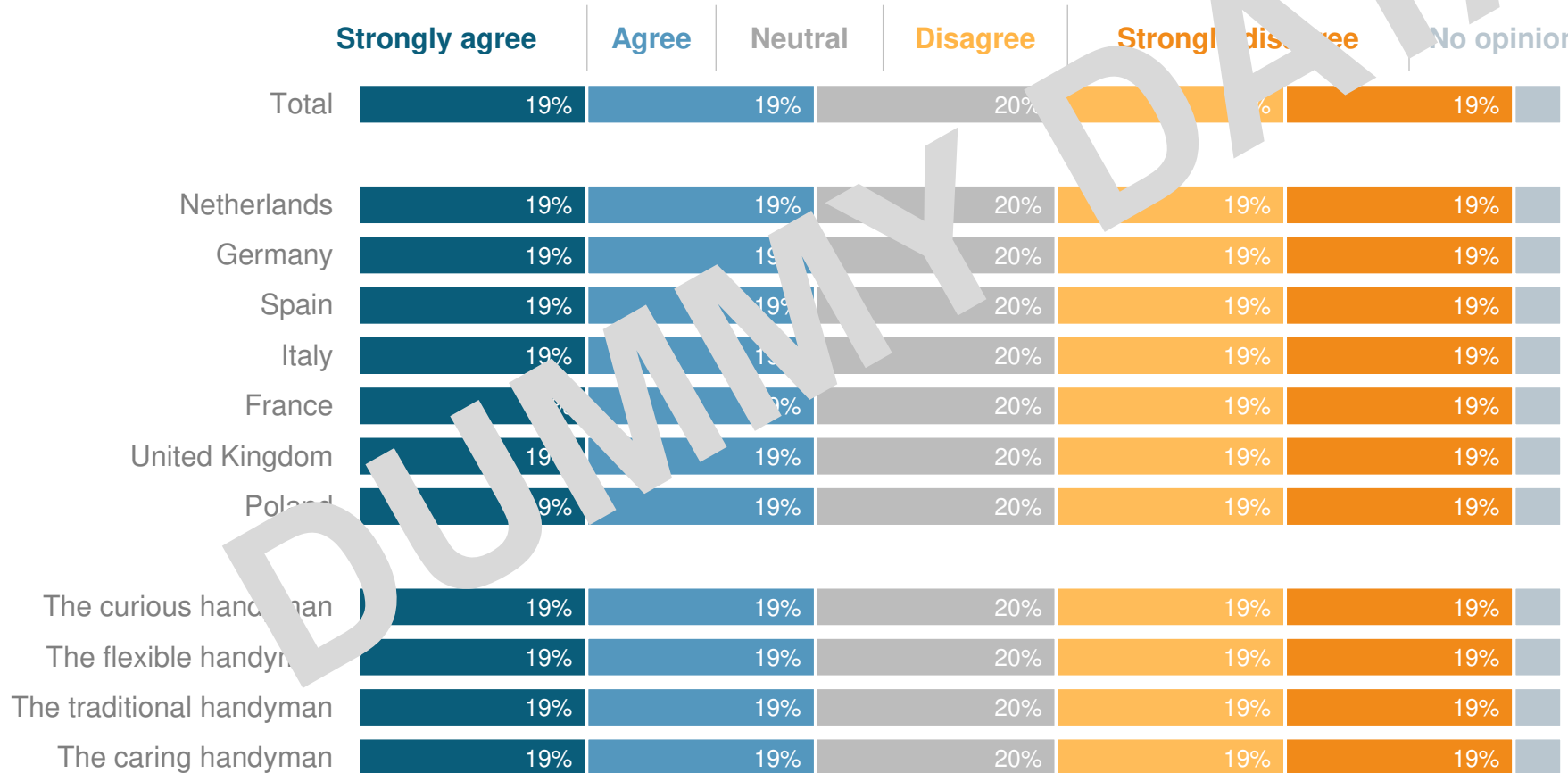


...

...

**STATEMENT**

“I always use materials and accessories that guarantee a neat and tidy job”



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Orientation behaviour and media usage

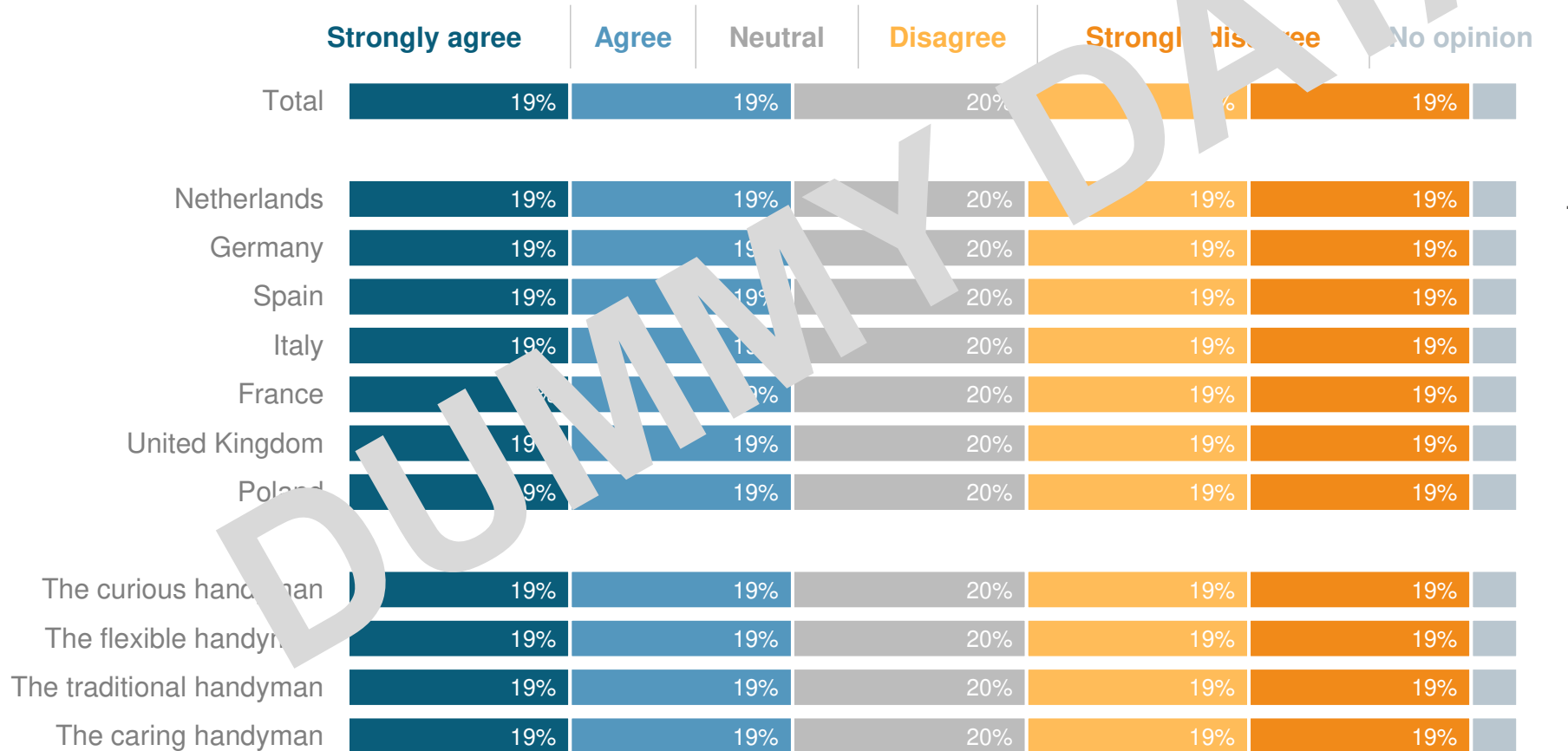


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**STATEMENT**

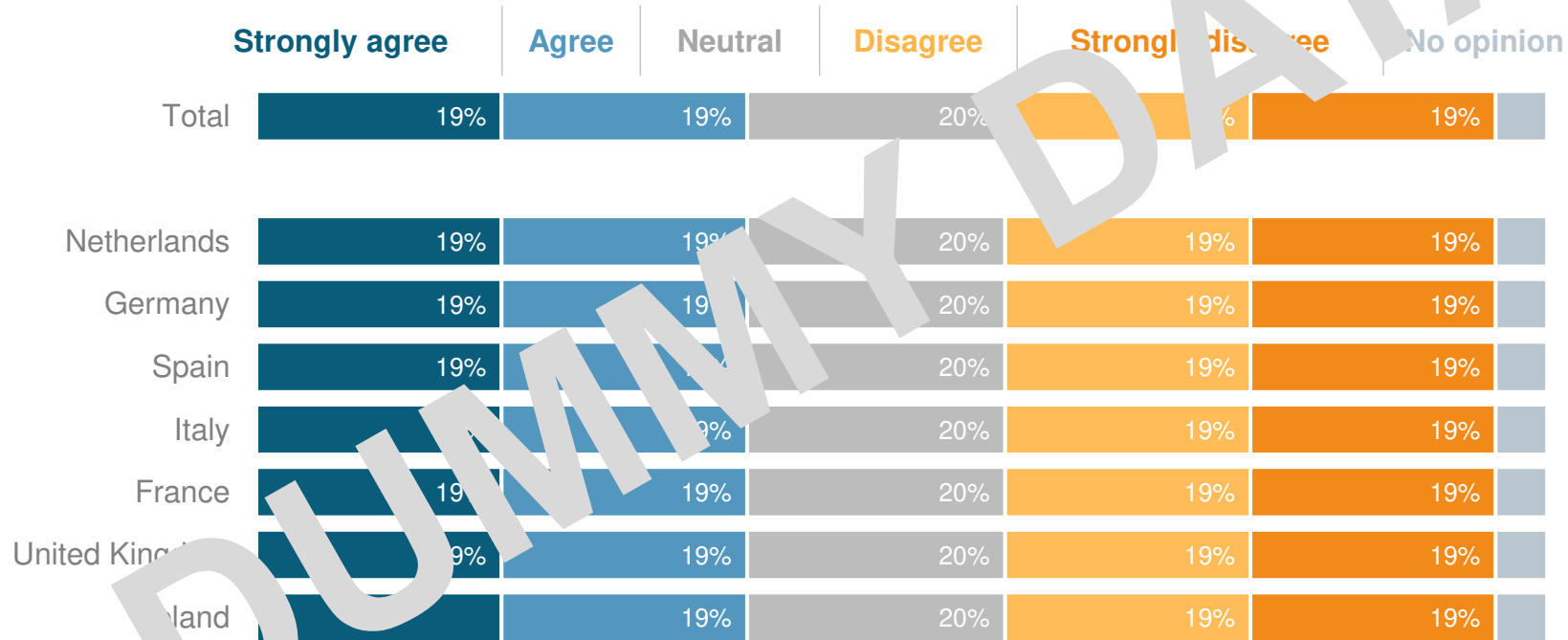
“I often watch videos about product features and applications”



...

**STATEMENT**

“It is hard for me to keep up with the innovations in the market”

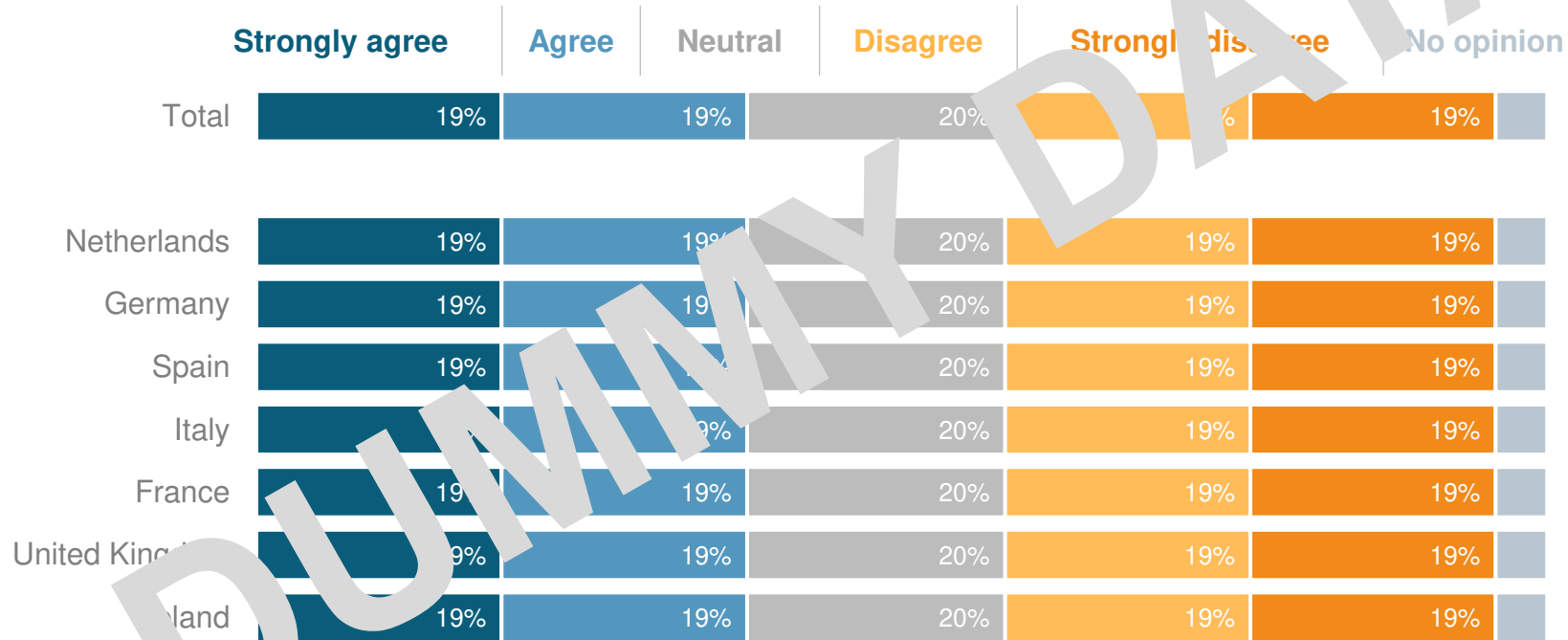




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**STATEMENT**

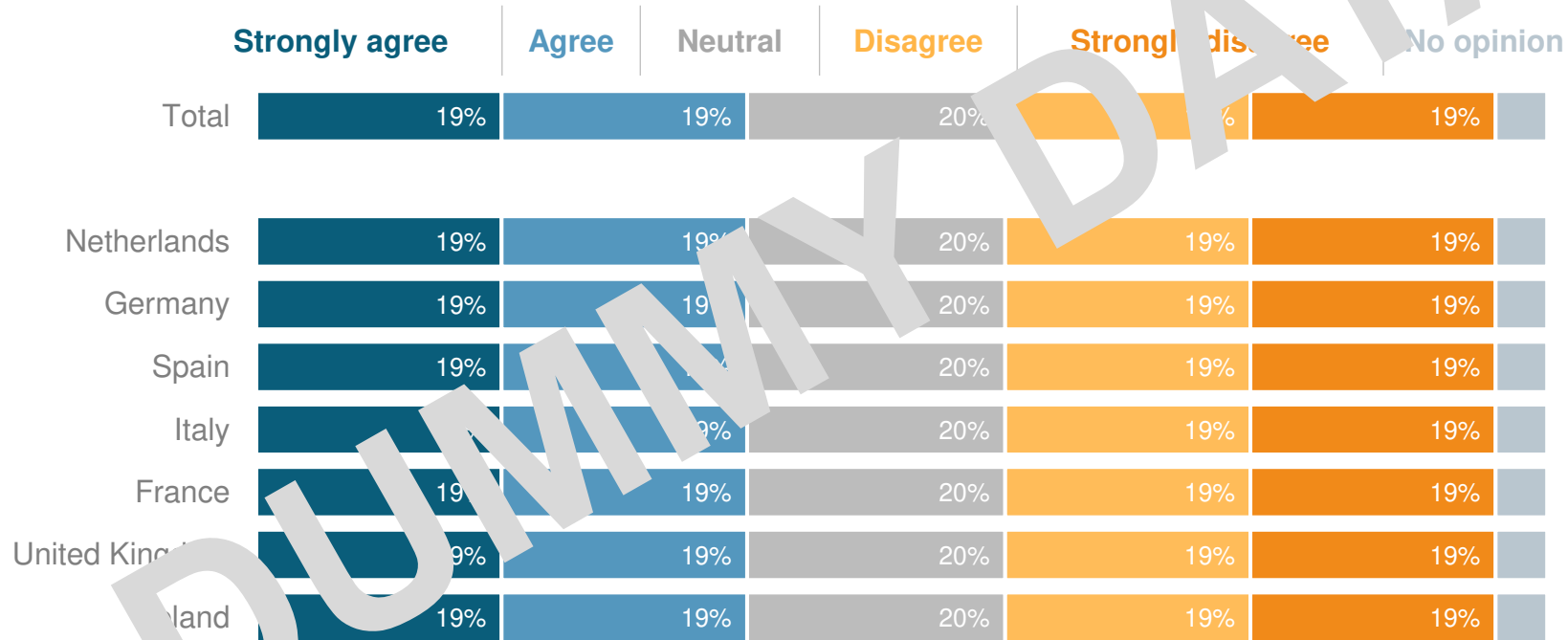
“I often use digital tools and apps to learn about product features and applications”



...

**STATEMENT**

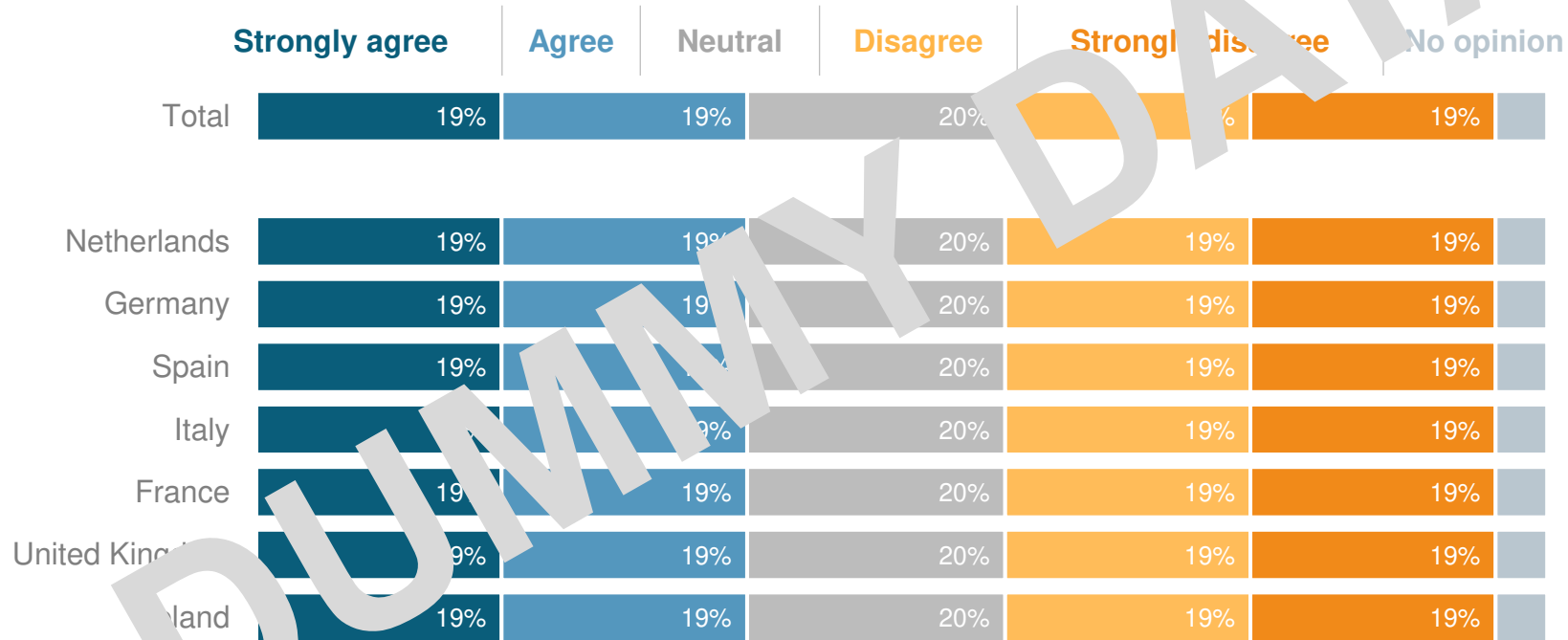
“I often look for work-related information through online channels”



...

**STATEMENT**

“I always follow the latest developments about new products and tools”

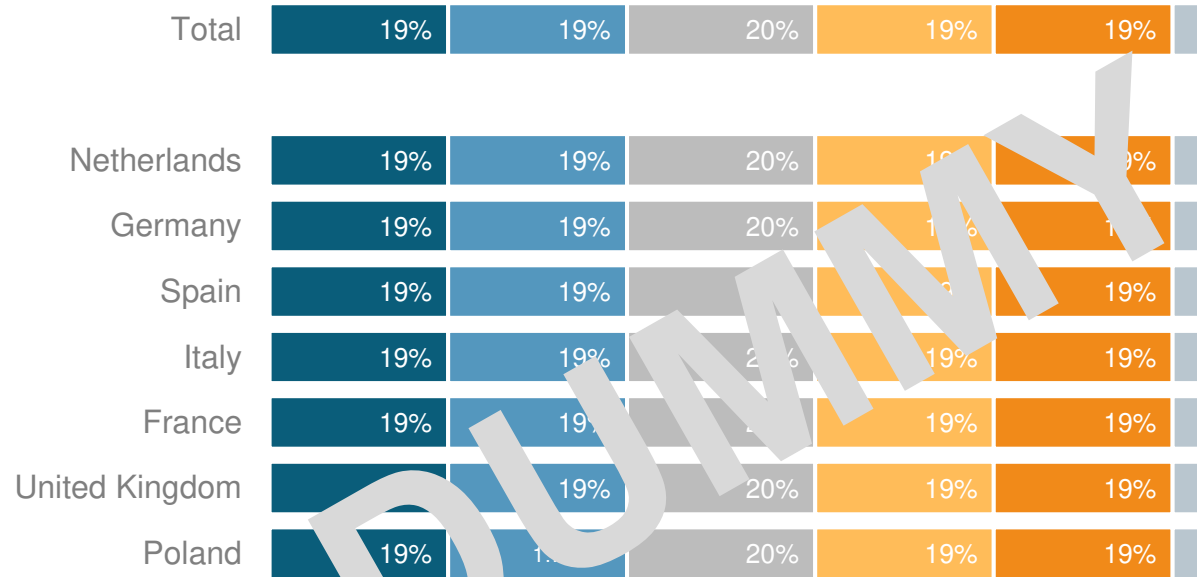


...

**STATEMENT**

“I regularly follow trainings and demonstrations”

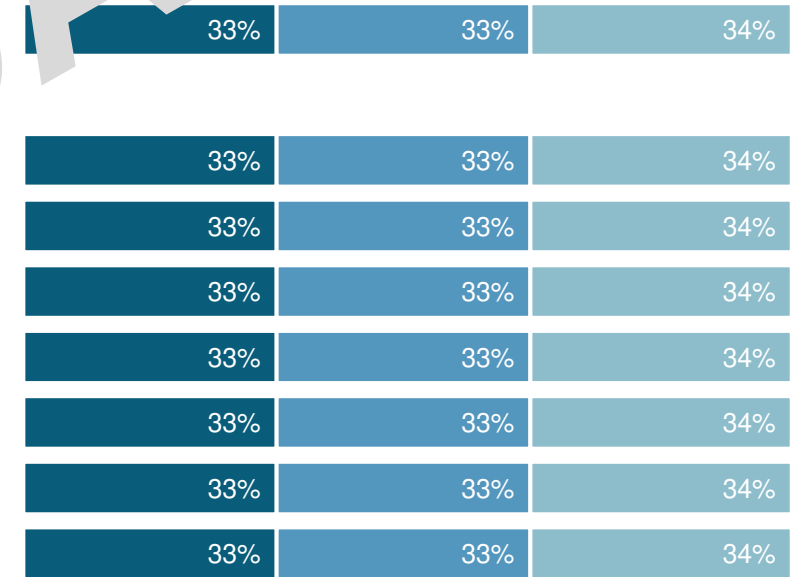
**Strongly agree** | **Agree** | **Neutral** | **Disagree** | **Strongly disagree** | **No opinion**



**Preference**

Q: Do you prefer online or in-person trainings and demonstrations?

**In-person** | **Online** | **Neutral**

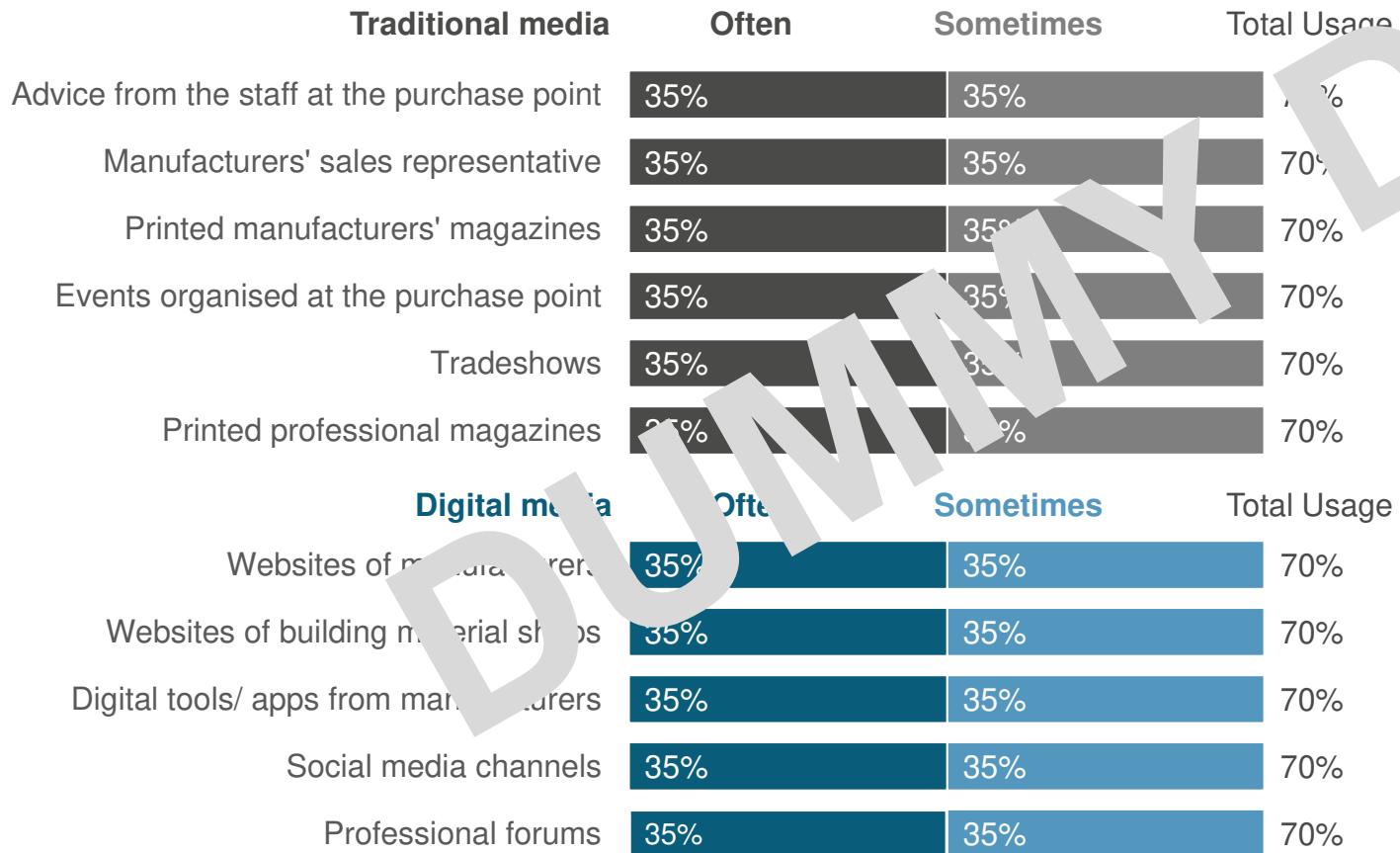


Question on preference asked if regularly following trainings and demonstrations: n=x (Italy n=x; Spain n=x; Germany n=x; UK n=x; Poland n=x; Netherlands n=x; France n=x)

...

**Media usage**

Q: How often do you use the following information sources for work-related information?



...

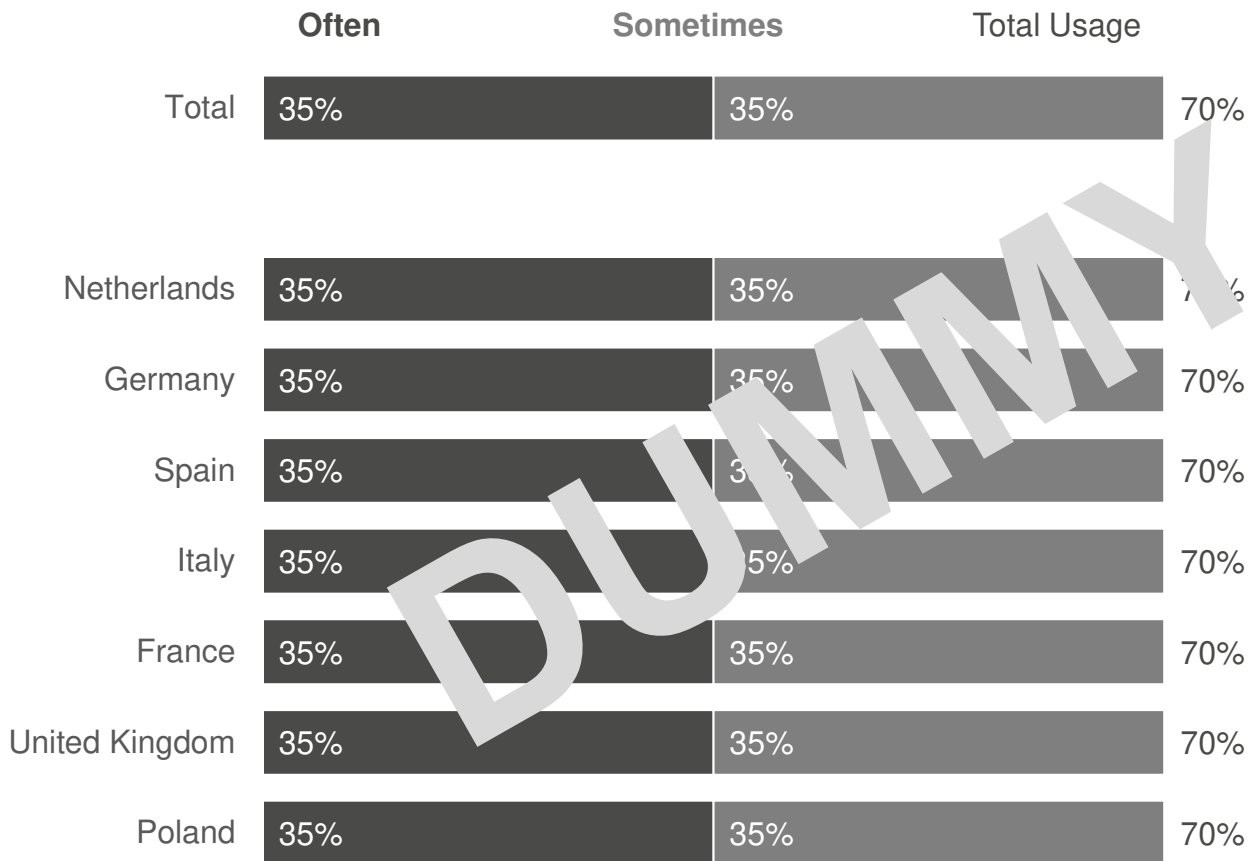
Media usage  
Advice from the staff at the purchase point



DUMMY DATA

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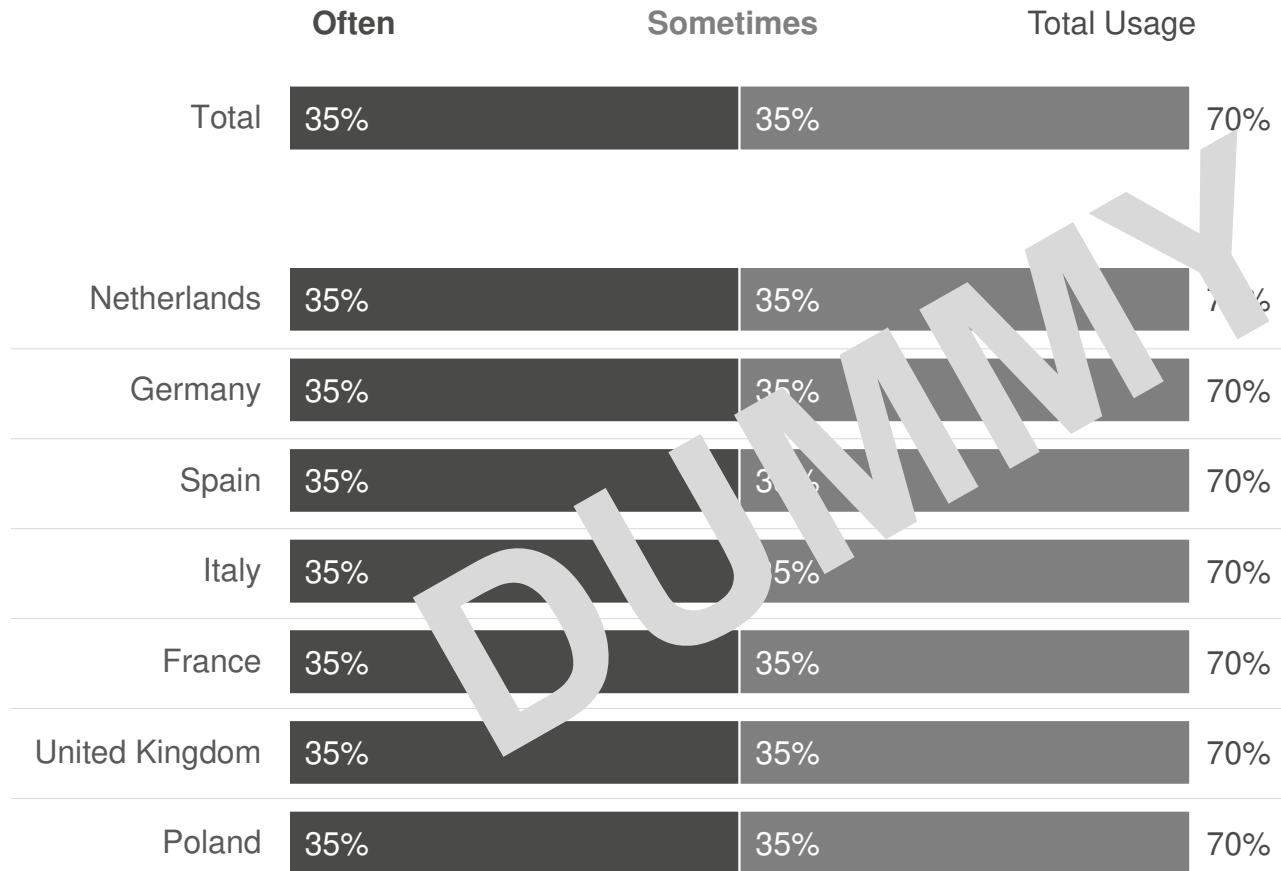
Media usage  
**Events** (e.g. trainings, demonstrations) **organised at the purchase point**





...

Media usage  
Printed manufacturers' magazines



DUMMY DATA

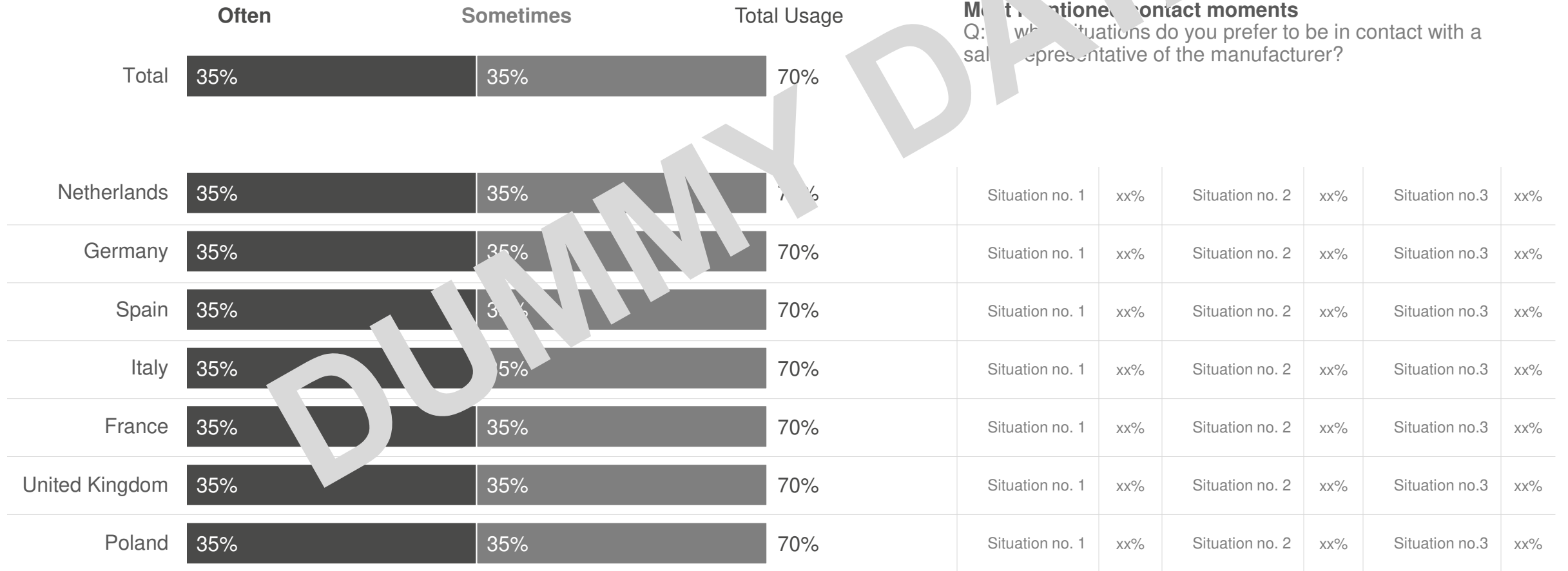
Most important information

Q: What are the top three most important types of information you want to find in the manufacturers' magazines?

Information no. 1	xx%	Information no. 2	xx%	Information no.3	xx%
Information no.1	xx%	Information no. 2	xx%	Information no.3	xx%
Information no.1	xx%	Information no. 2	xx%	Information no.3	xx%
Information no.1	xx%	Information no. 2	xx%	Information no.3	xx%
Information no.1	xx%	Information no. 2	xx%	Information no.3	xx%
Information no.1	xx%	Information no. 2	xx%	Information no.3	xx%
Information no.1	xx%	Information no. 2	xx%	Information no.3	xx%
Information no.1	xx%	Information no. 2	xx%	Information no.3	xx%

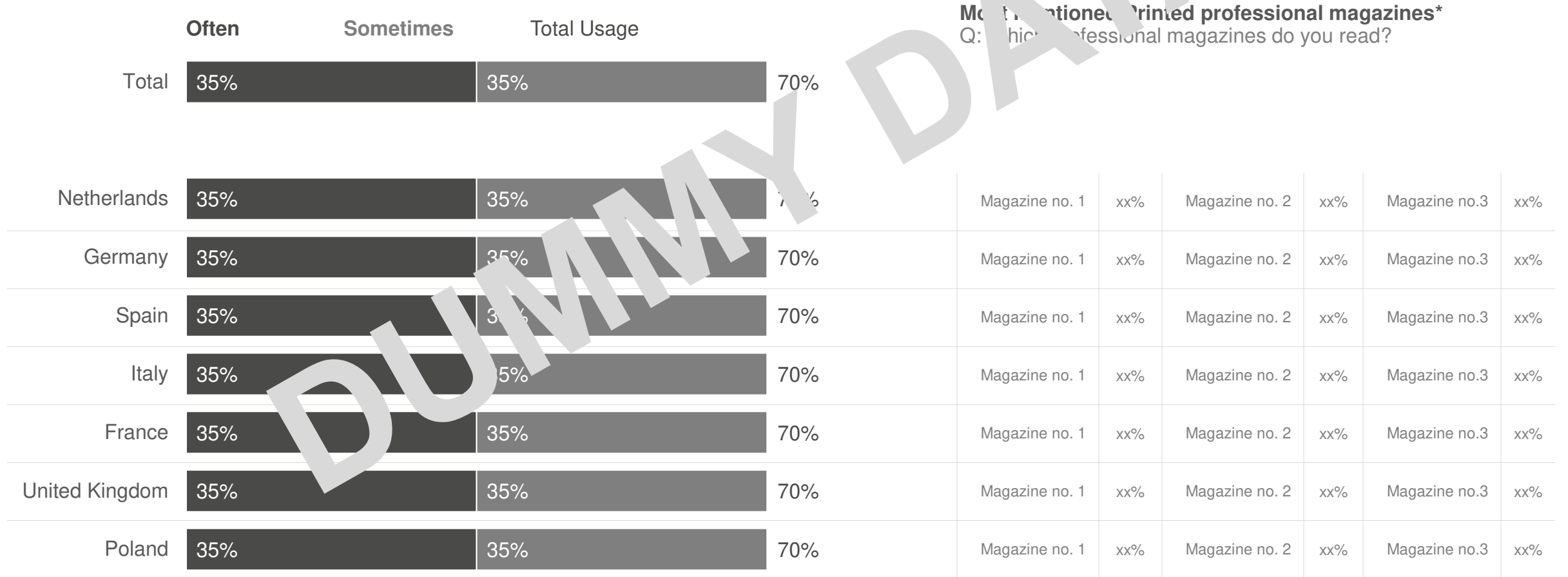
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Media usage  
**Manufacturers' sales representative**



...

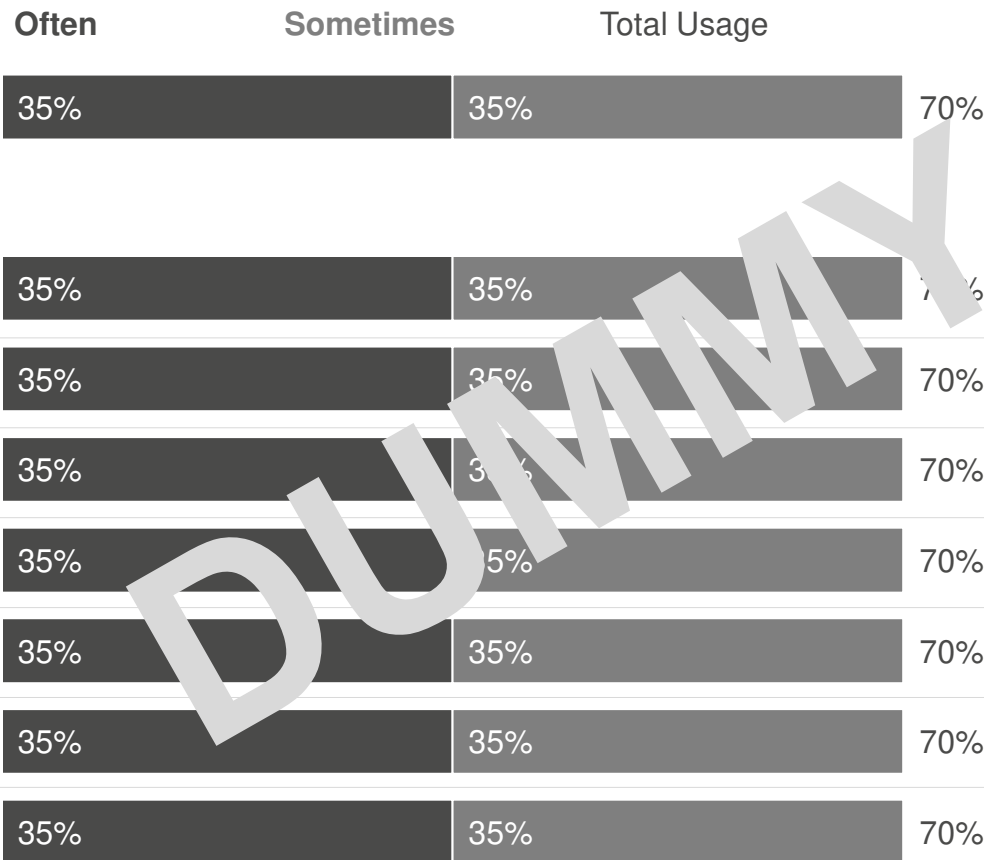
Media usage  
Printed professional magazines



\*Only professional magazines above 5% are shown.

...

Media usage  
Tradeshows



Most mentioned trade shows

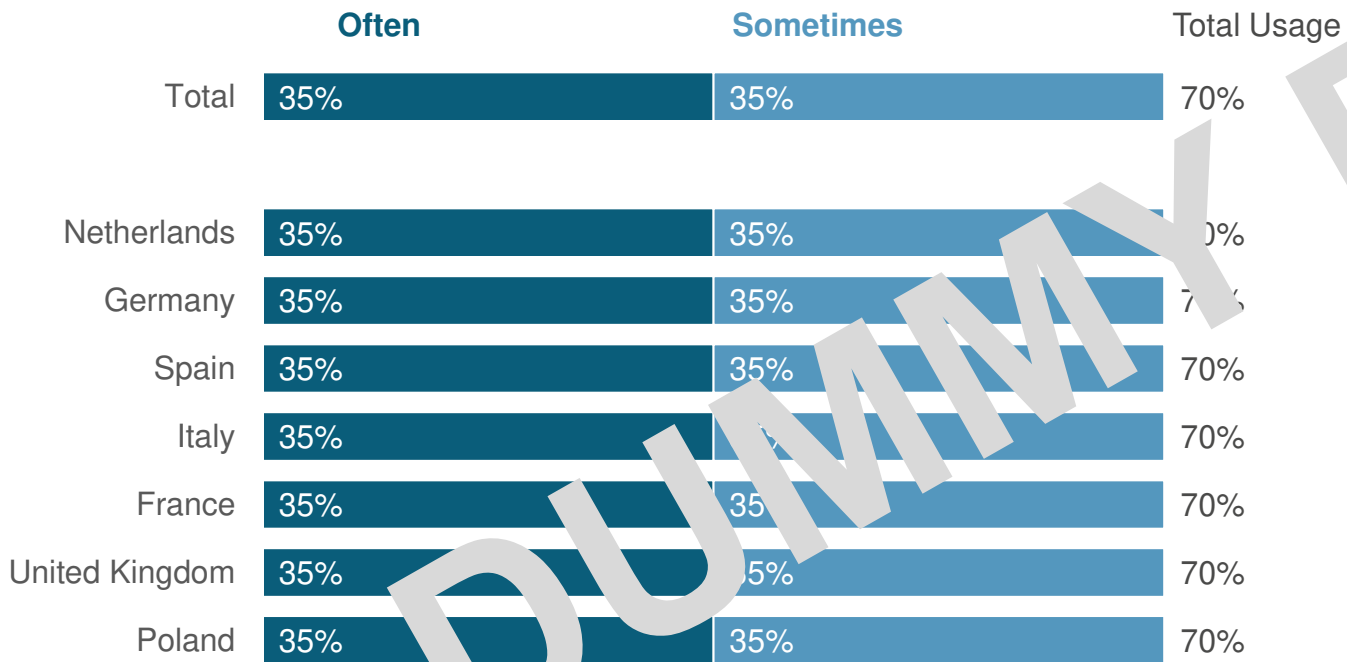
Q: Which trade shows do you plan to visit in the next 2 years?

	Tradeshow no. 1	xx%	Tradeshow no. 2	xx%	Tradeshow no.3	xx%
Netherlands	Tradeshow no. 1	xx%	Tradeshow no. 2	xx%	Tradeshow no.3	xx%
Germany	Tradeshow no. 1	xx%	Tradeshow no. 2	xx%	Tradeshow no.3	xx%
Spain	Tradeshow no. 1	xx%	Tradeshow no. 2	xx%	Tradeshow no.3	xx%
Italy	Tradeshow no. 1	xx%	Tradeshow no. 2	xx%	Tradeshow no.3	xx%
France	Tradeshow no. 1	xx%	Tradeshow no. 2	xx%	Tradeshow no.3	xx%
United Kingdom	Tradeshow no. 1	xx%	Tradeshow no. 2	xx%	Tradeshow no.3	xx%
Poland	Tradeshow no. 1	xx%	Tradeshow no. 2	xx%	Tradeshow no.3	xx%

\*Only tradeshows above 5% are shown.

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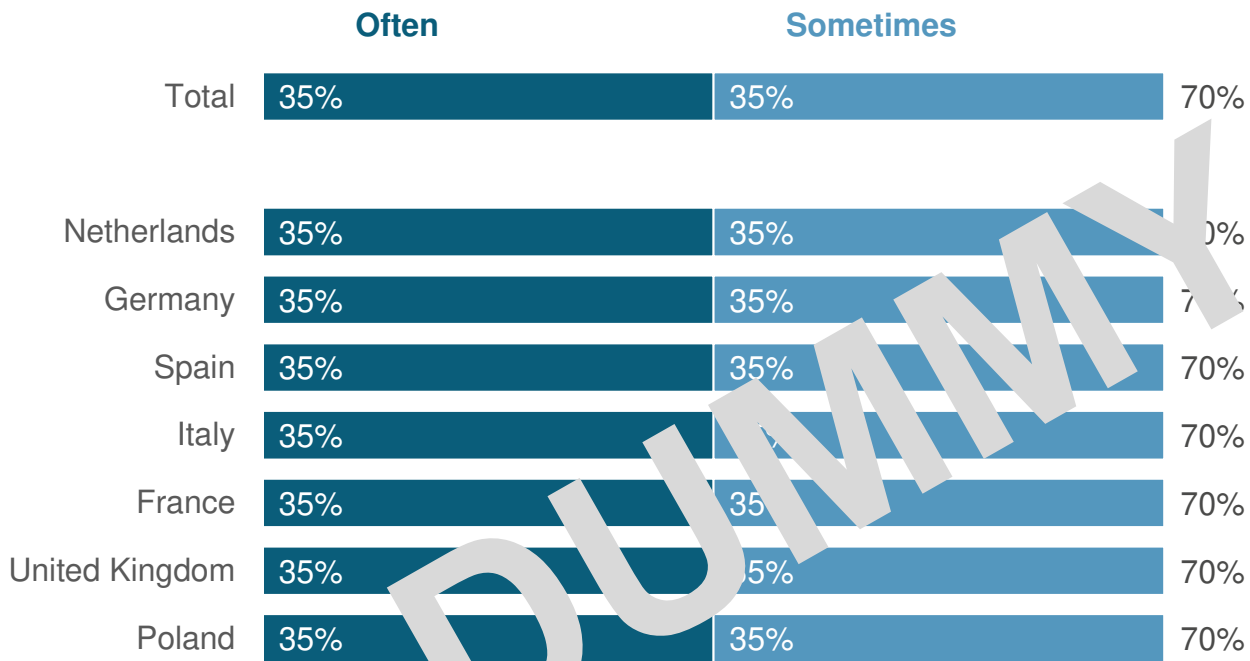
Media usage  
**Websites of building material shops (e.g. builders' merchant, DIY stores)**



DUMMY DATA

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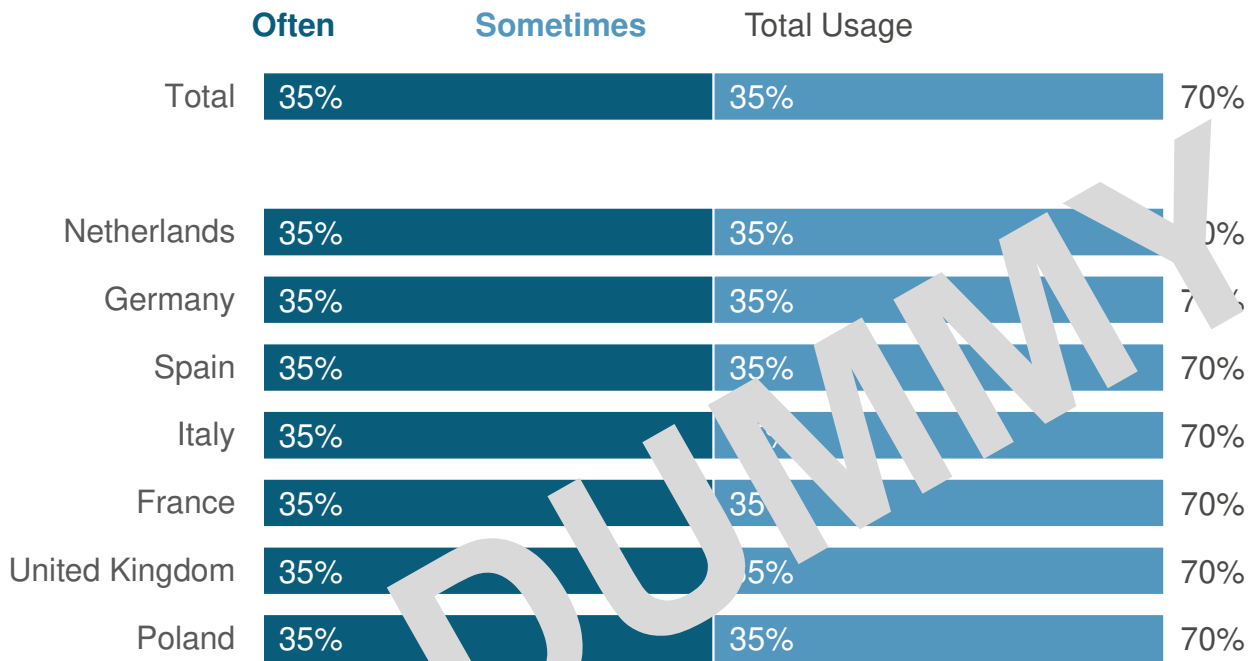
Media usage  
**Websites of manufacturers**



DUMMY DATA

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Media usage  
Professional forums

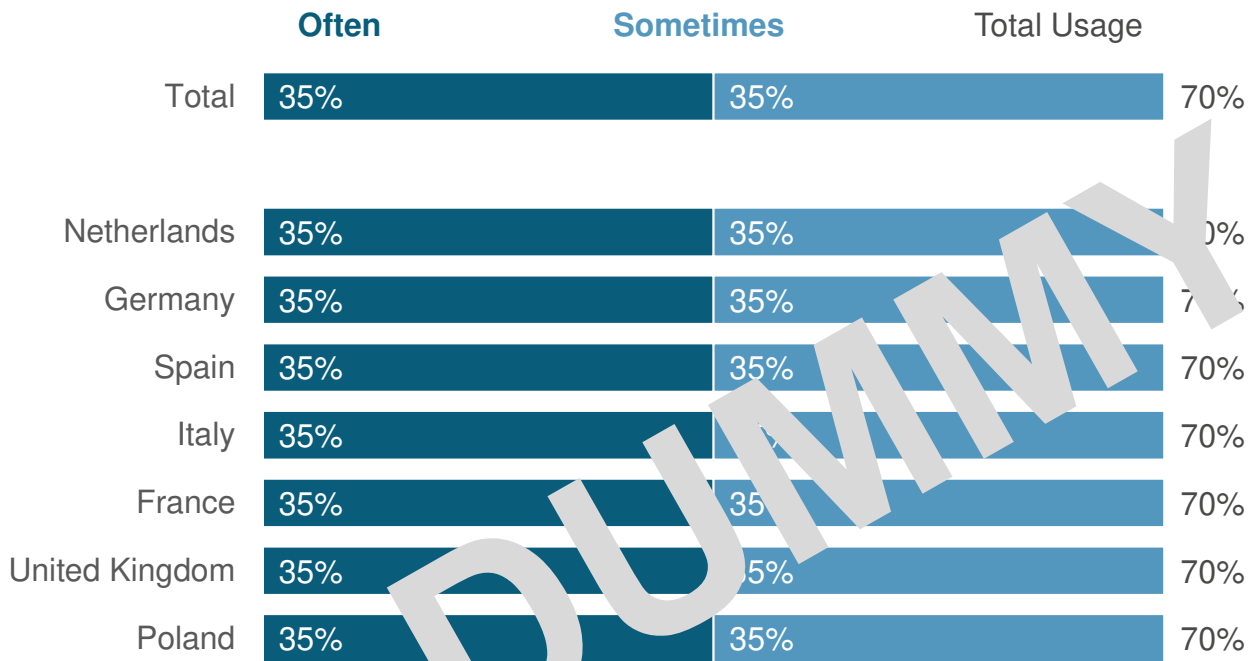


DUMMY DATA



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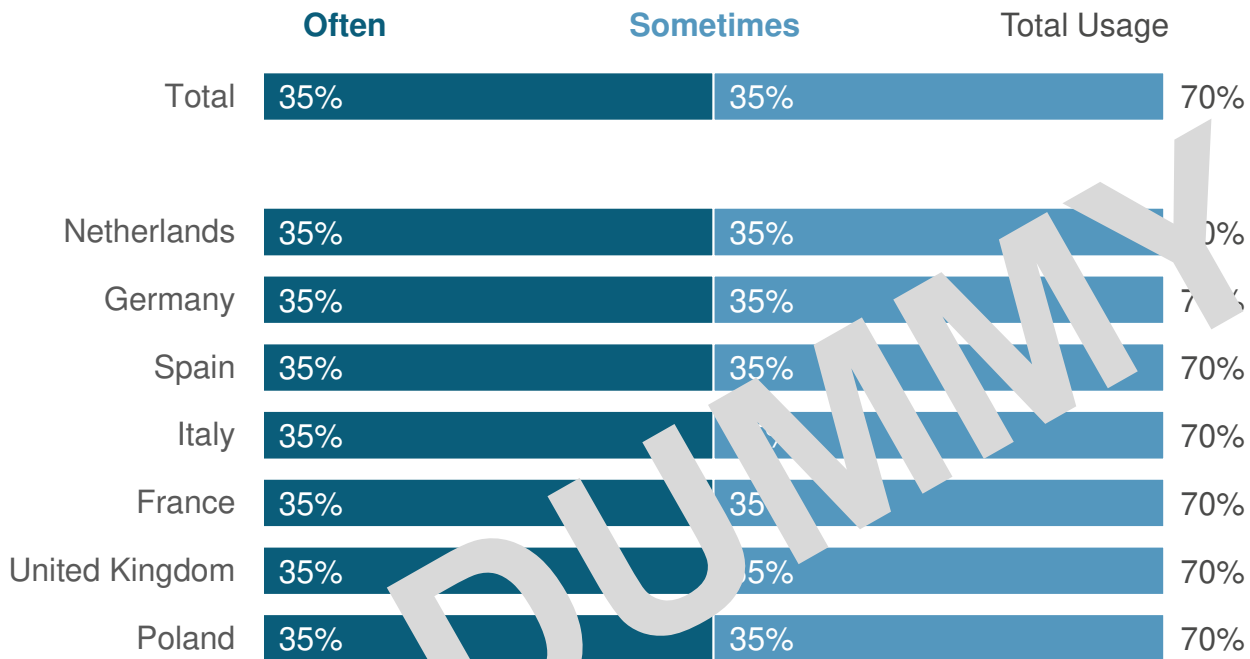
Media usage  
**Digital tools/ apps from manufacturers**



DUMMY DATA

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Media usage  
**Social media channels (e.g. YouTube, Facebook)**



DUMMY DATA

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Management Summary

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Professional behaviour

Buying behaviour

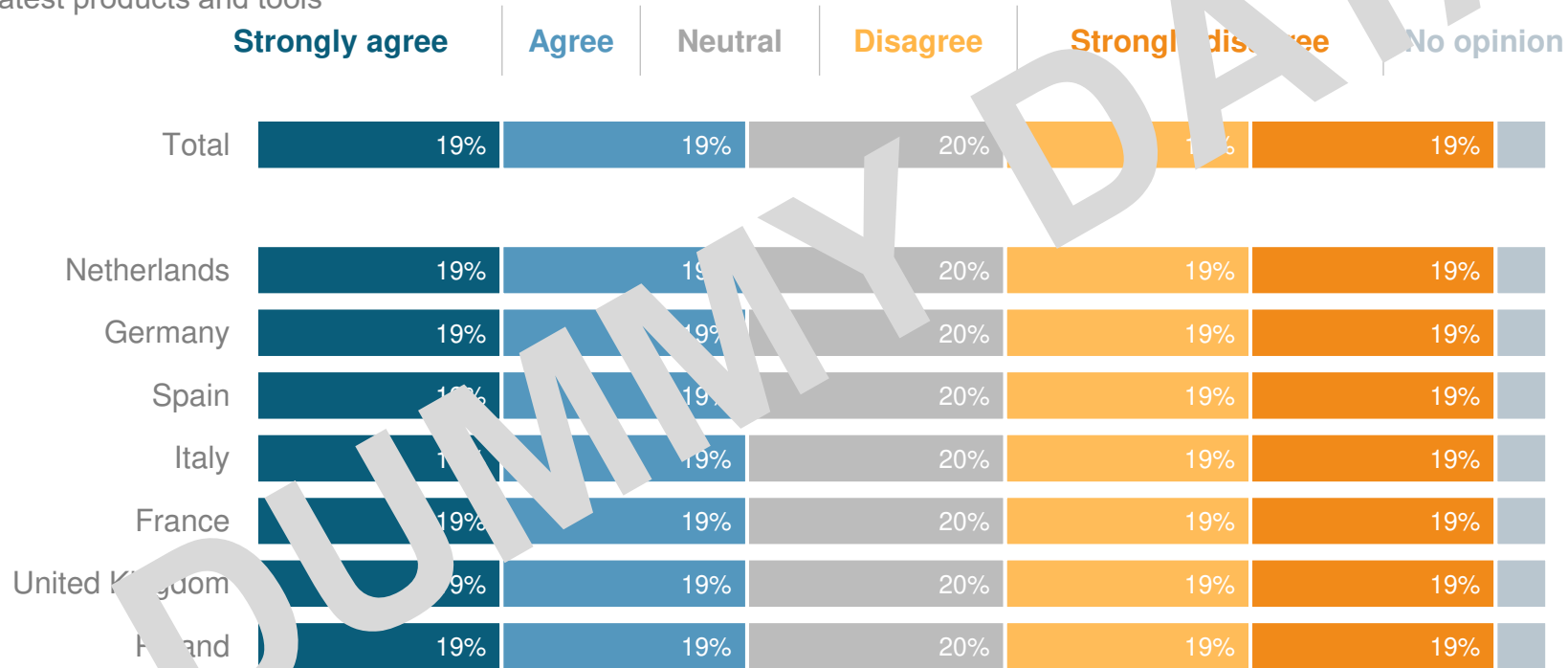
Orientation behaviour and media usage



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**STATEMENT**

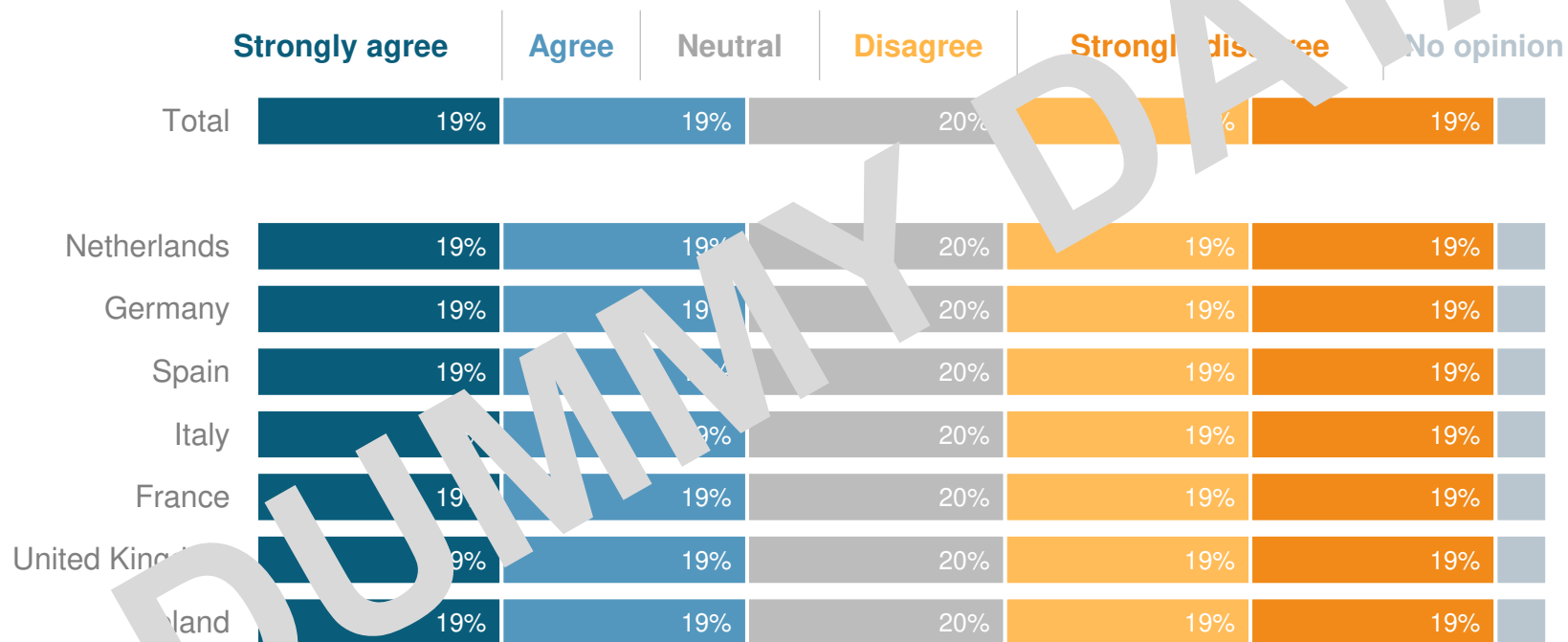
“I always buy the latest products and tools”



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**STATEMENT**

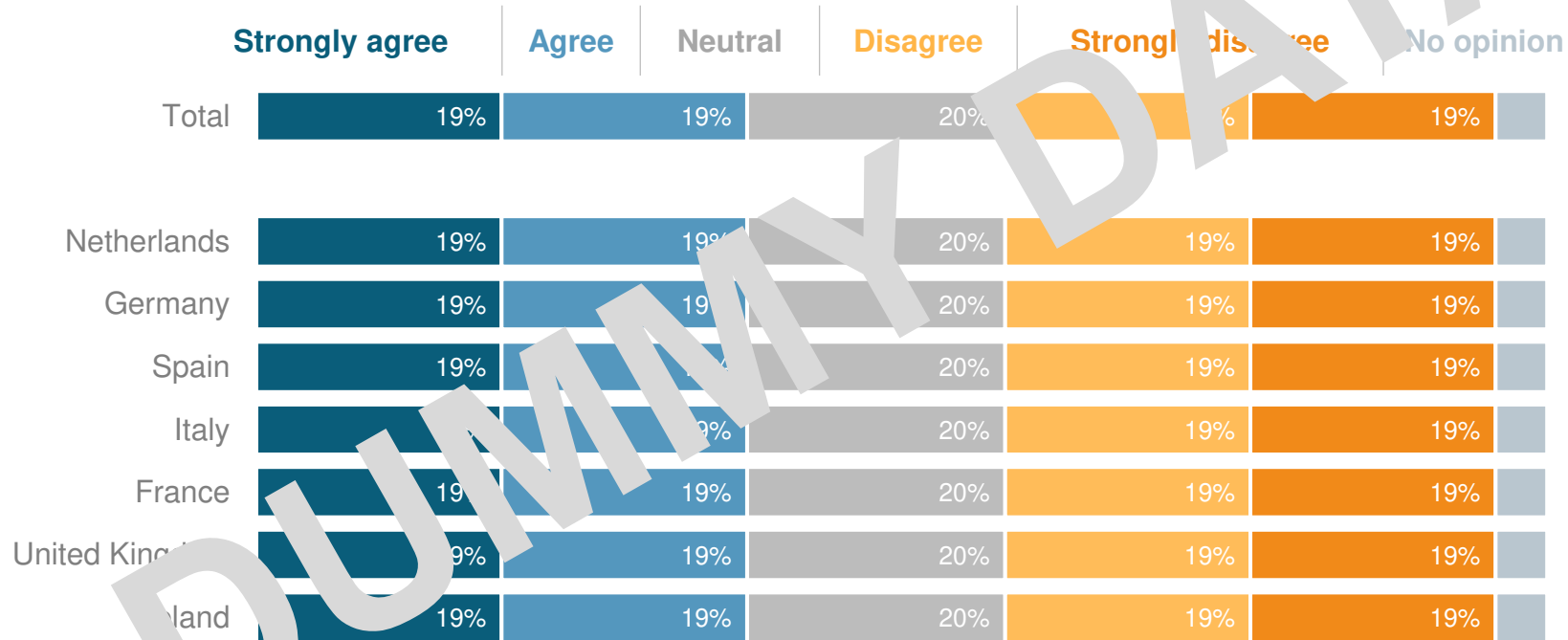
“I always buy environment-friendly products even if they are more expensive”



...

**STATEMENT**

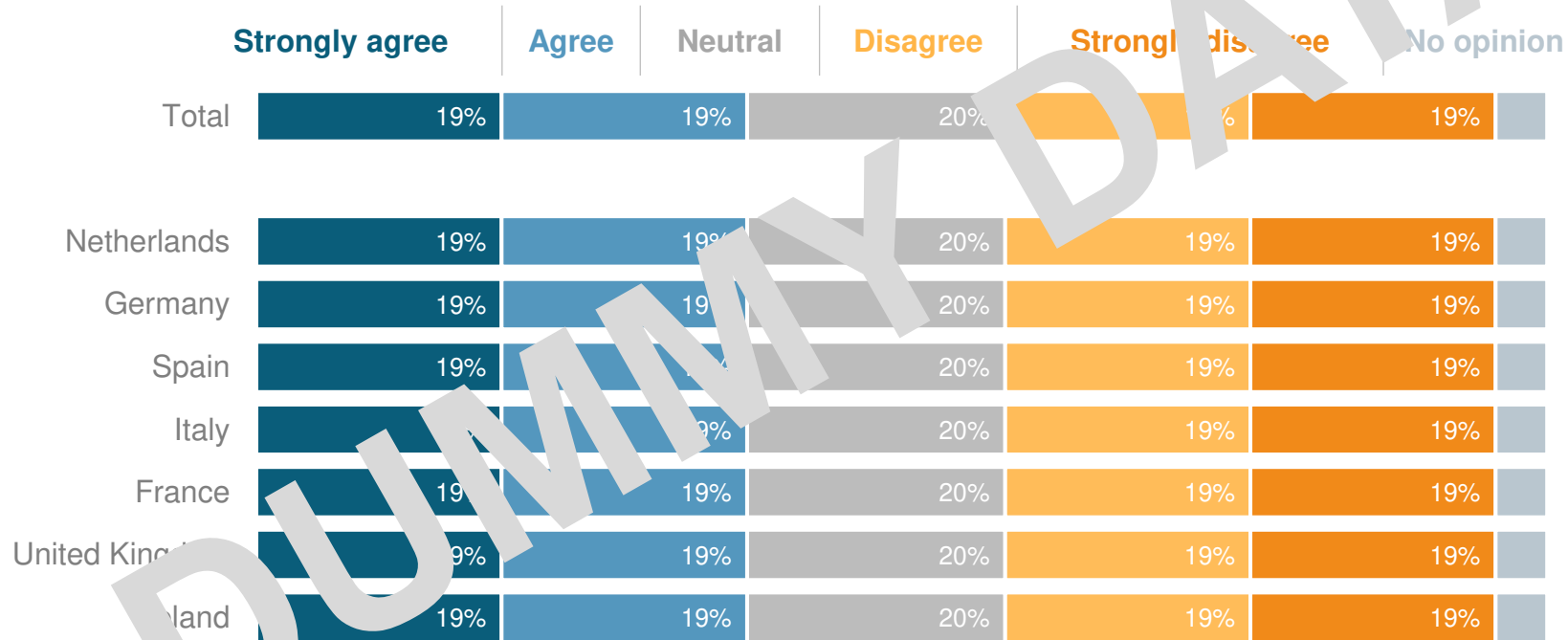
“I only buy brands that care for the environment”



...

**STATEMENT**

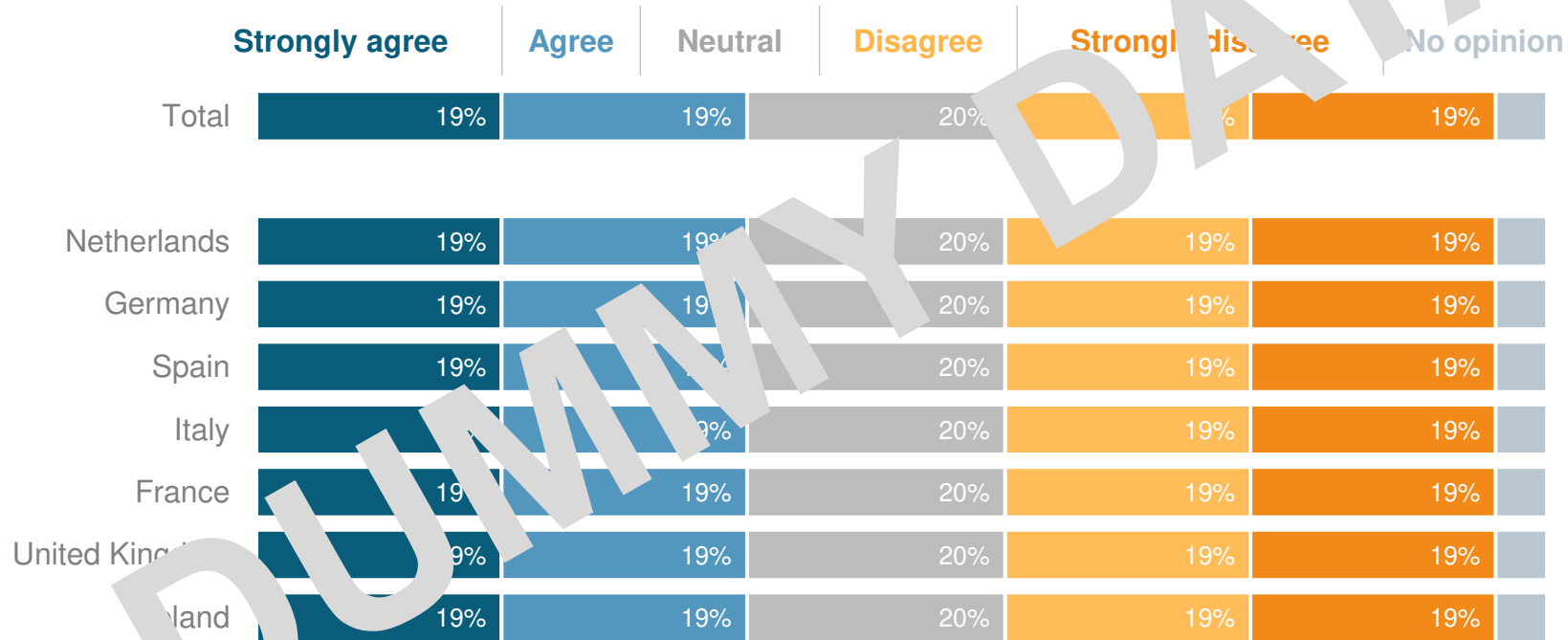
“I always buy the best quality product even if it is more expensive”



...

**STATEMENT**

“I order most of my products online”

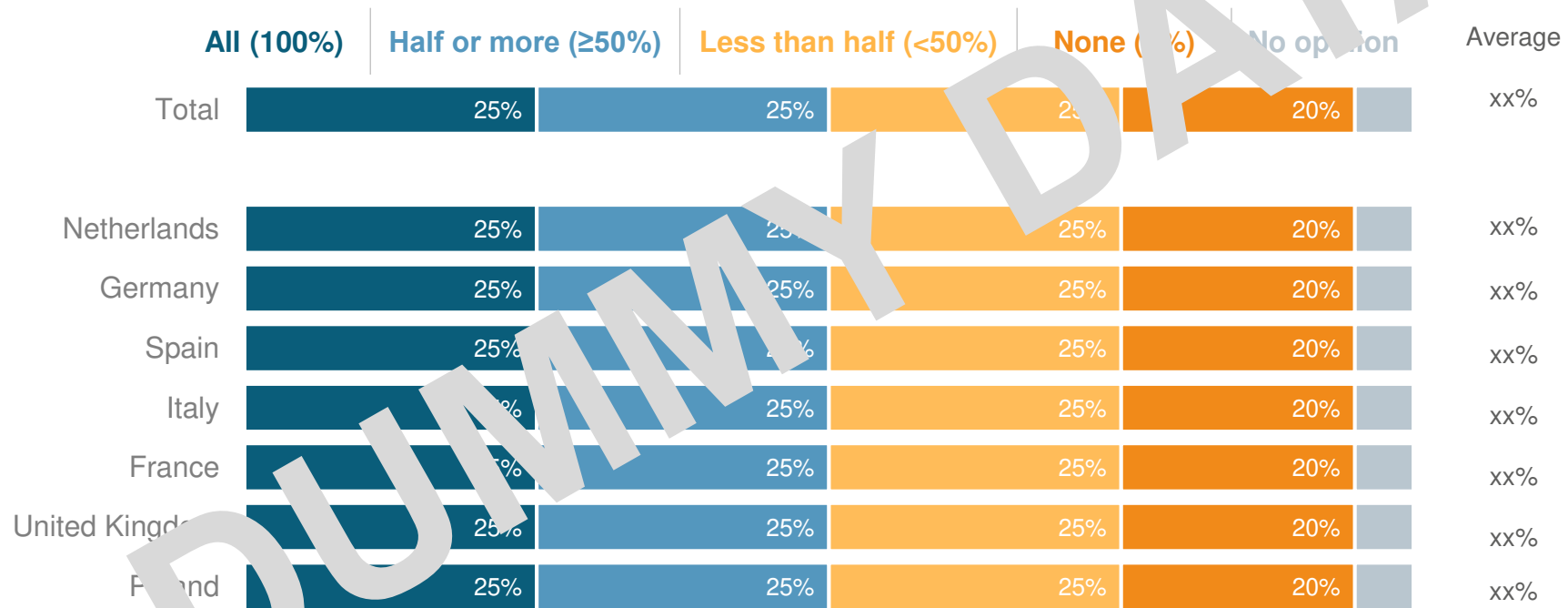




...

**Handyman purchasing power**

Q: What share of the products and materials do you/ does your company buy yourself/ itself for the jobs you do [rather than customer or main contractor buying]?

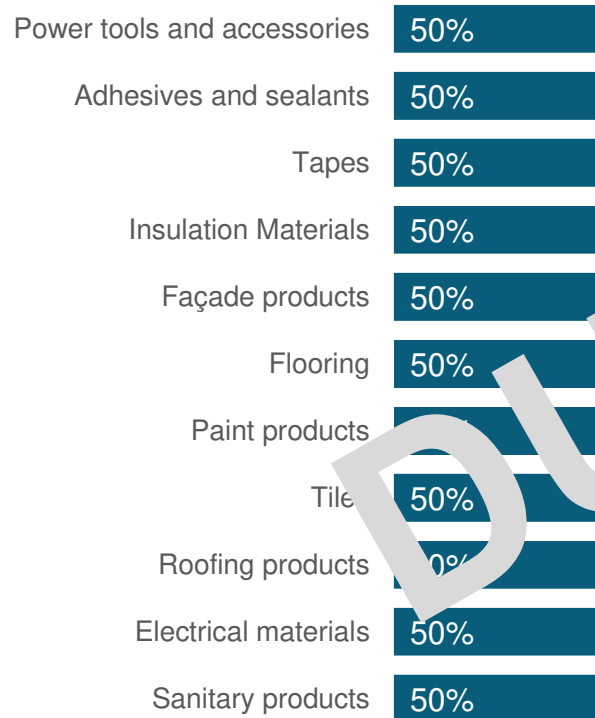


...

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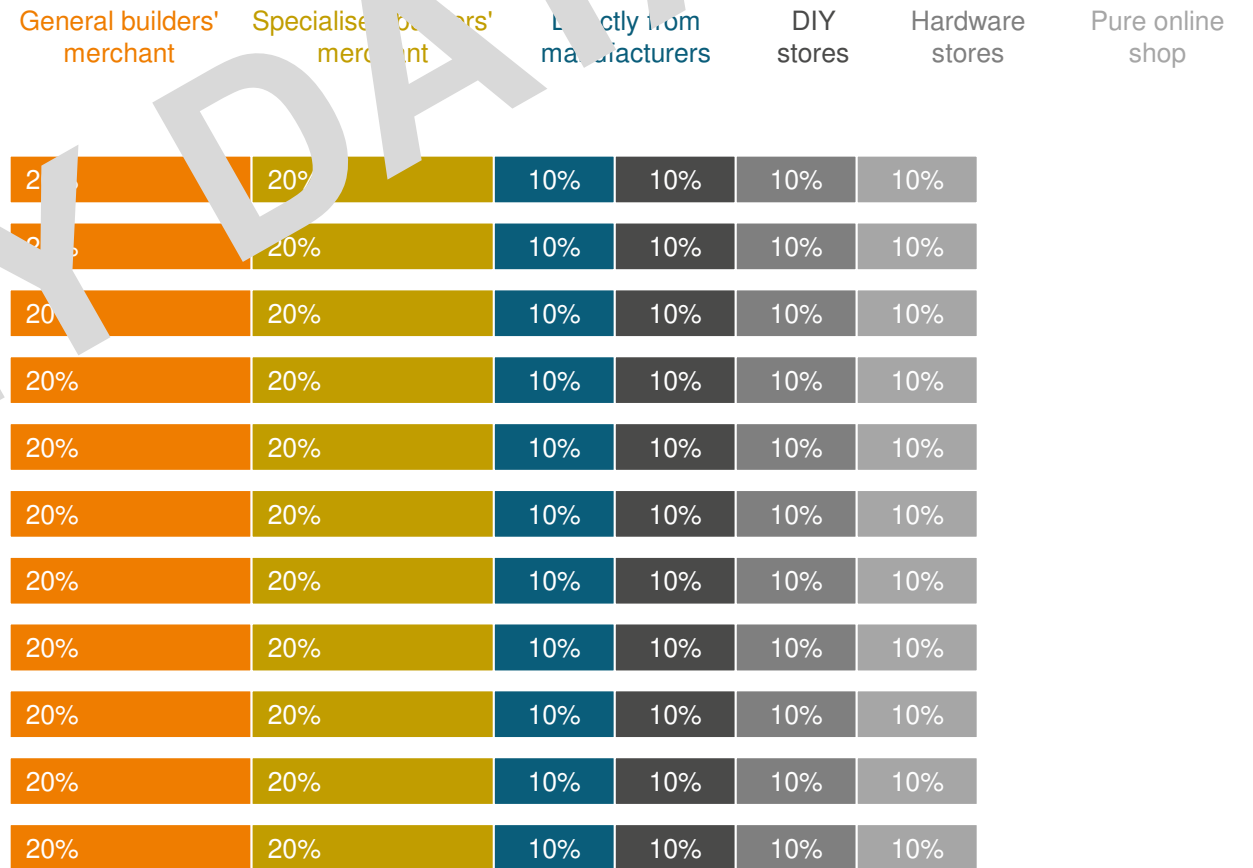
**Share of handymen purchasing [product group] at a total level**

Q: Do you/ does your company buy the following product groups yourself/ itself for the jobs you do?



**Most common purchase channels for product groups at a total level \***

Q: Where do you mostly buy [product group] for the jobs you do?



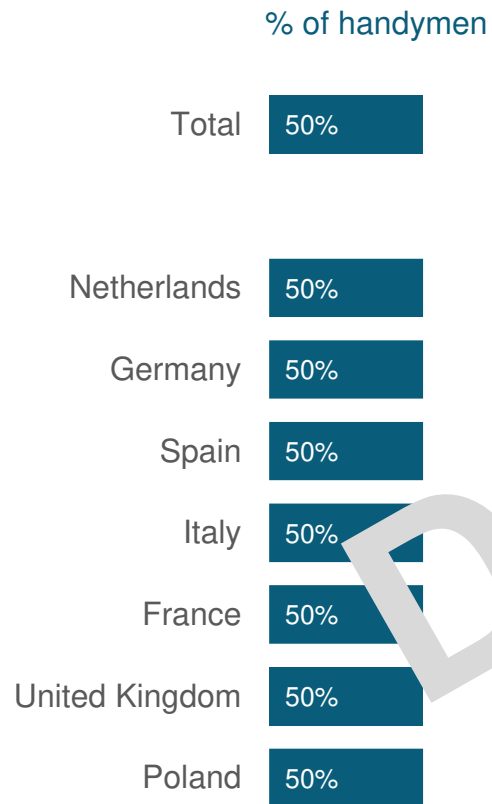
\* Question on purchase channels asked only if purchasing the product.

\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph.

...

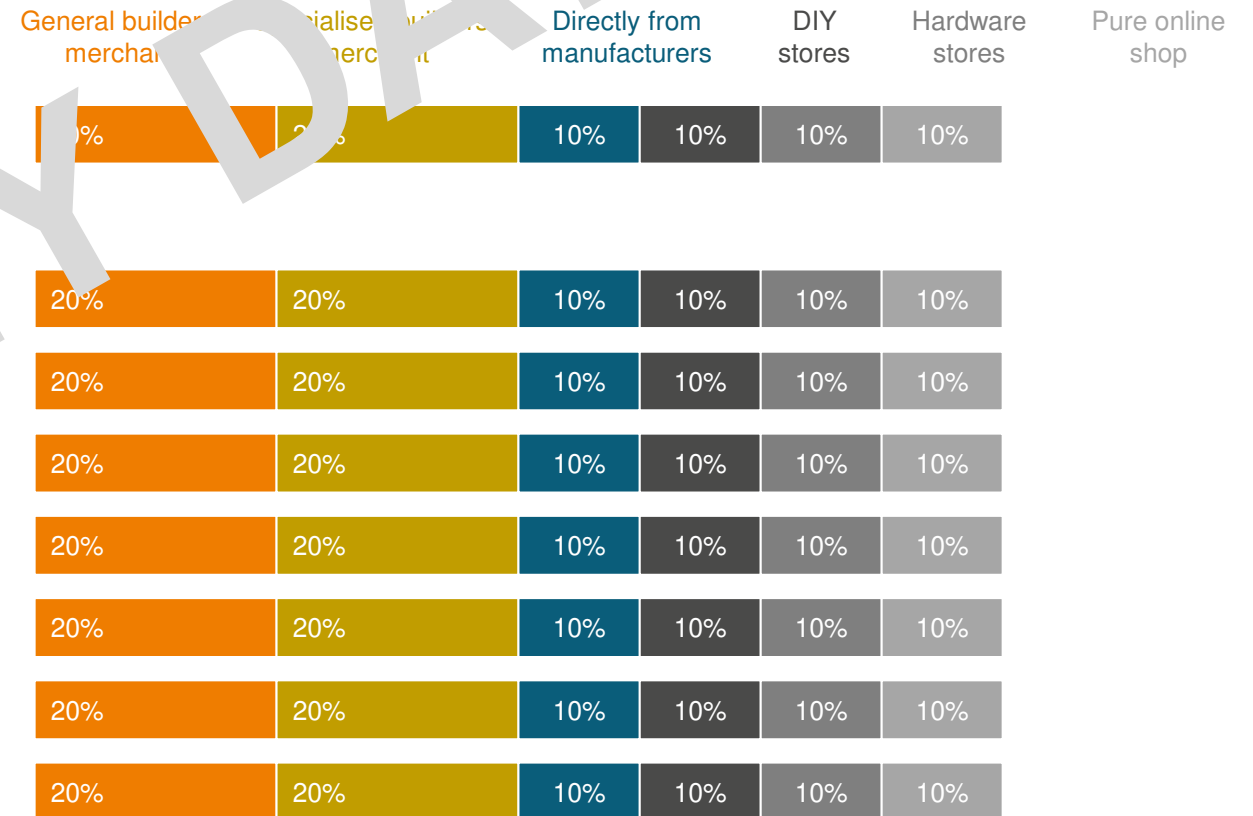
### Share of handymen purchasing paint products per country

Q: Do you/does your company buy the following product groups?



### Most common purchase channels for paint products per country

Q: Where do you mostly buy tiles for the jobs you do?

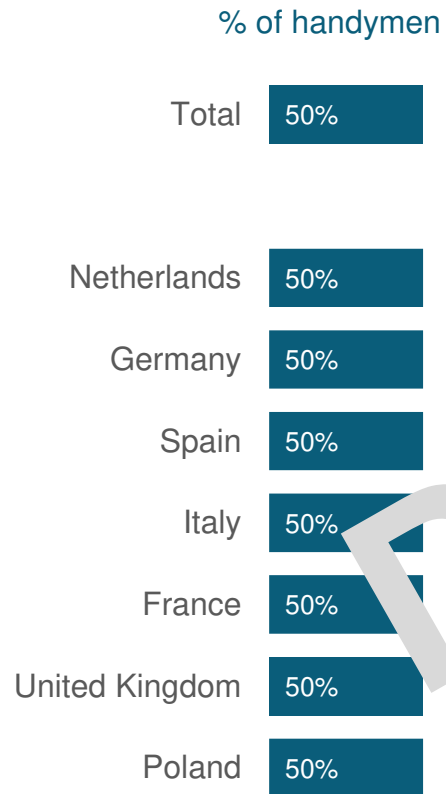


\* Question on purchase channels asked only if purchasing paint products: n=xx (Netherlands n= xx; Germany n= xx; Spain n= xx; Italy n= xx; France n= xx; UK n=xx; Poland n= xx; ).

\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph

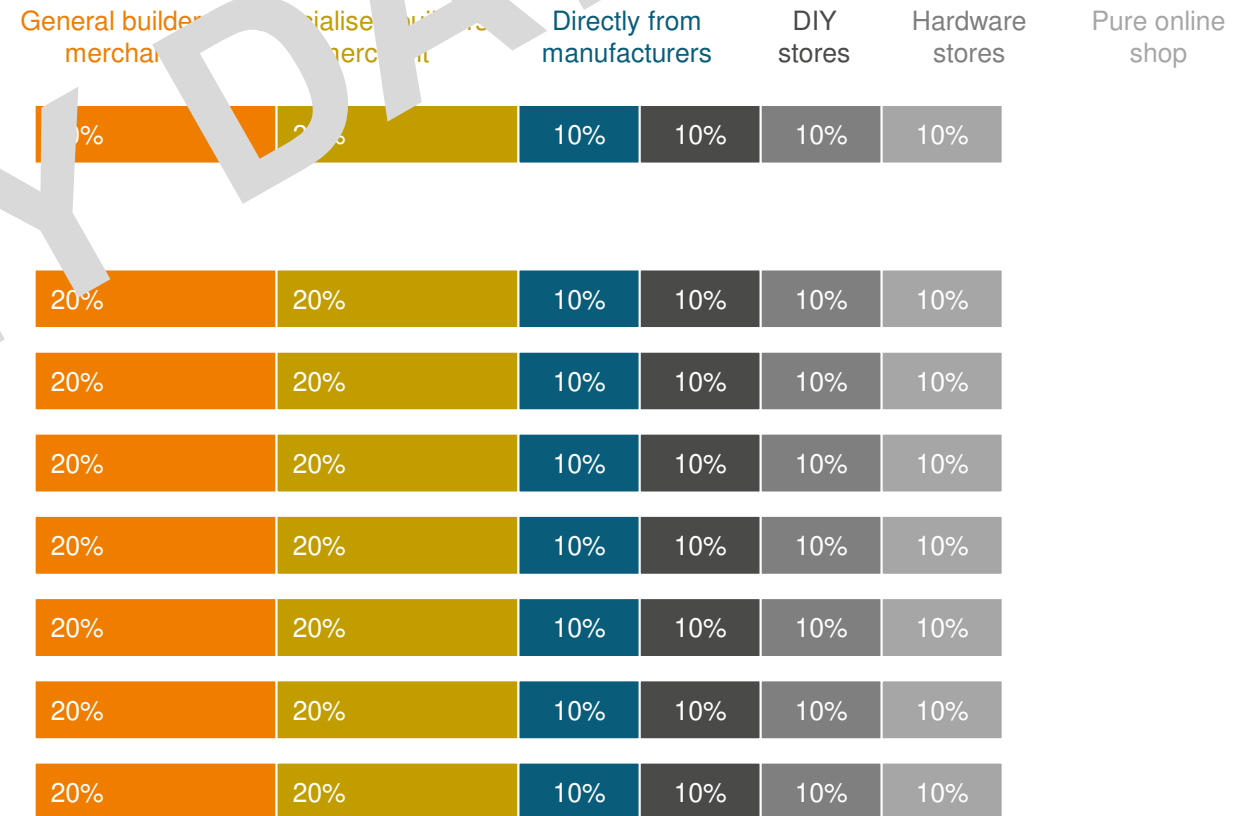
Share of handymen purchasing flooring products per country

Q: Do you/does your company buy the following product groups?



Most common purchase channels for flooring products per country

Q: Where do you mostly buy tiles for the jobs you do?



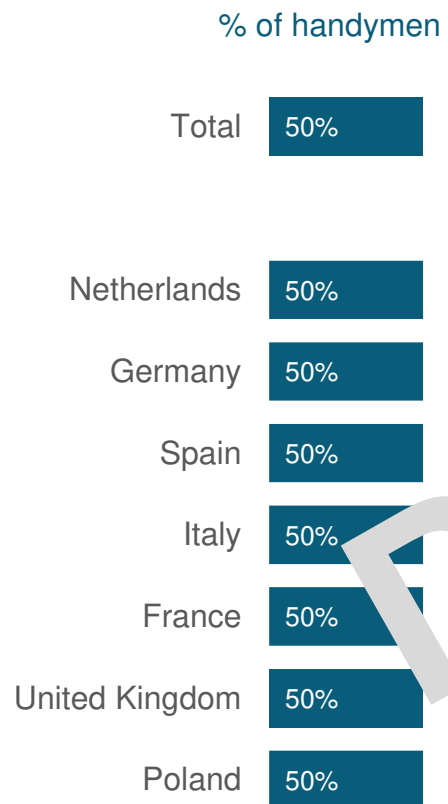
\* Question on purchase channels asked only if purchasing paint products: n=xx (Netherlands n= xx; Germany n= xx; Spain n= xx; Italy n= xx; France n= xx; UK n=xx; Poland n= xx; ).

\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph

...

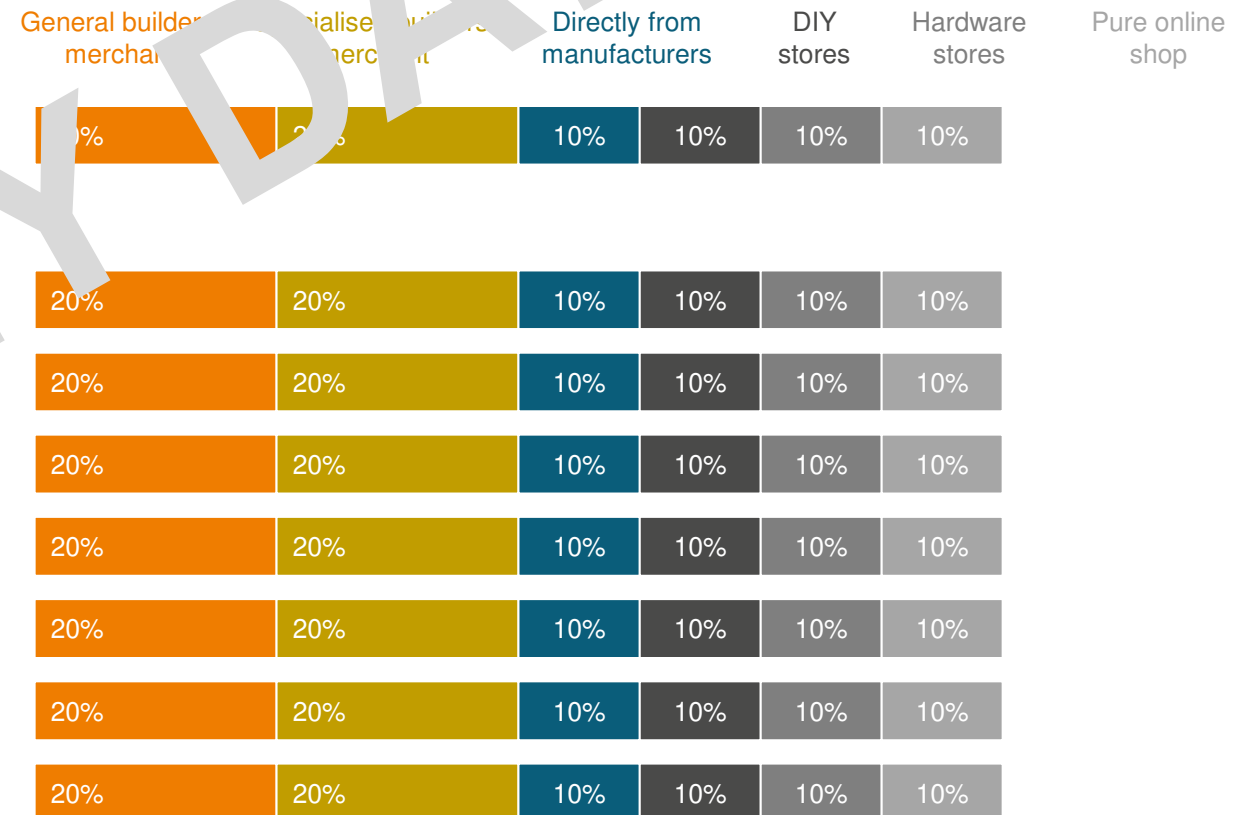
### Share of handymen purchasing tiles per country

Q: Do you/does your company buy the following product groups?



### Most common purchase channels for tiles per country

Q: Where do you mostly buy tiles for the jobs you do?



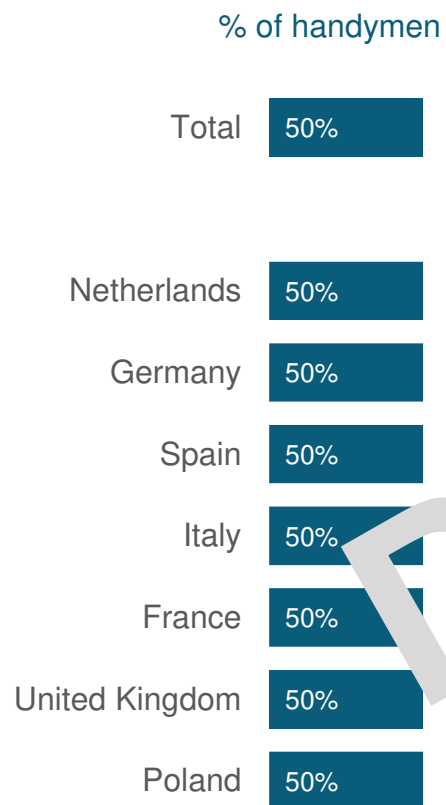
\* Question on purchase channels asked only if purchasing paint products: n=xx (Netherlands n= xx; Germany n= xx; Spain n= xx; Italy n= xx; France n= xx; UK n=xx; Poland n= xx; ).

\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph

...

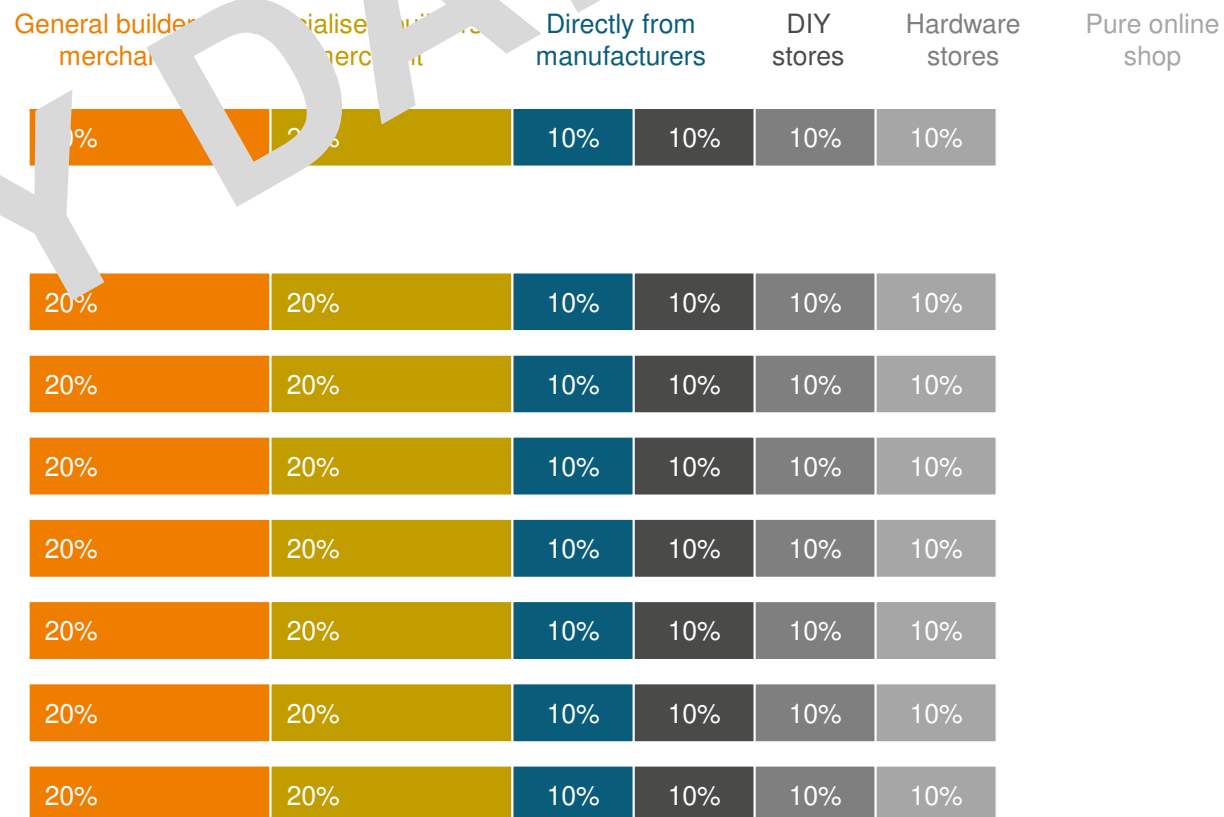
### Share of handymen purchasing adhesives and sealants per country

Q: Do you/does your company buy the following product groups?



### Most common purchase channels for adhesives and sealants per country

Q: Where do you mostly buy tiles for the jobs you do?

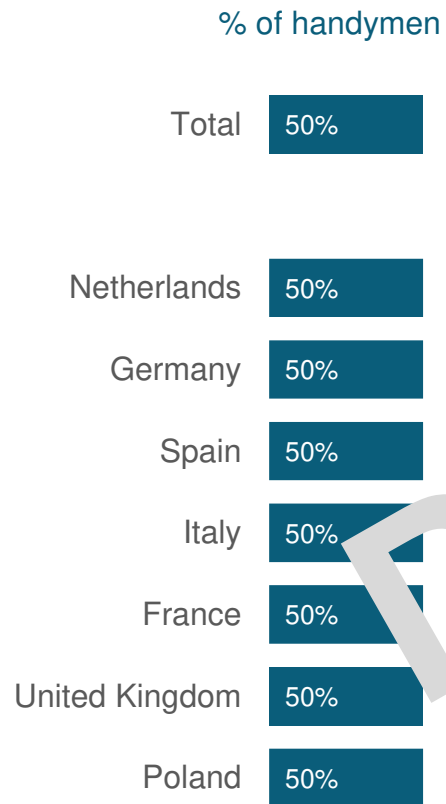


\* Question on purchase channels asked only if purchasing paint products: n=xx (Netherlands n= xx; Germany n= xx; Spain n= xx; Italy n= xx; France n= xx; UK n=xx; Poland n= xx; ).

\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph.

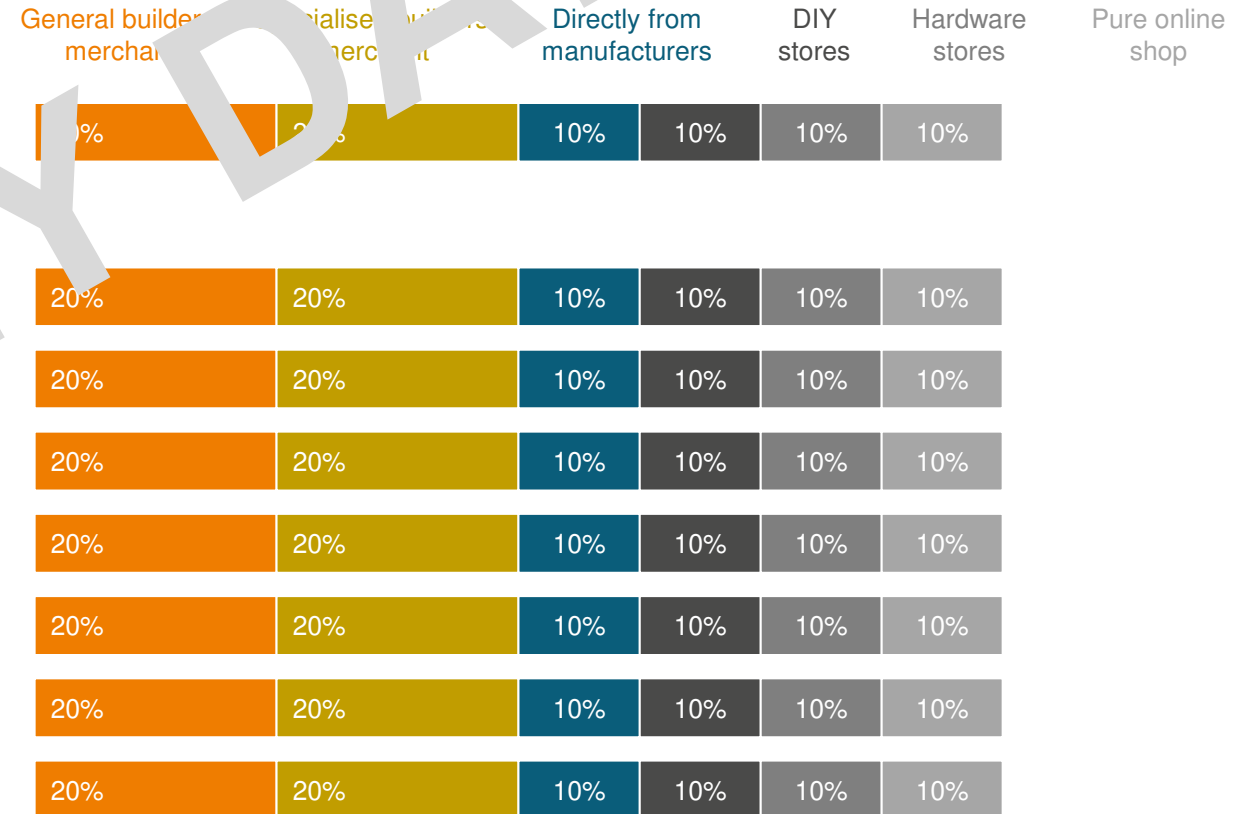
Share of handymen purchasing tapes per country

Q: Do you/does your company buy the following product groups?



Most common purchase channels for tapes per country

Q: Where do you mostly buy tiles for the jobs you do?



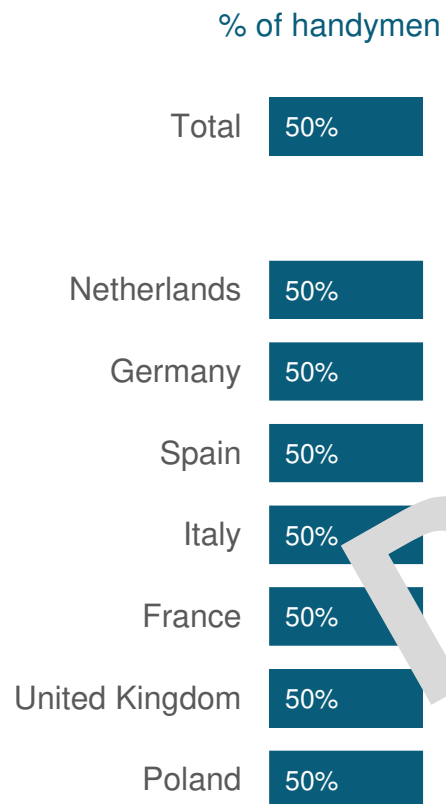
\* Question on purchase channels asked only if purchasing paint products: n=xx (Netherlands n= xx; Germany n= xx; Spain n= xx; Italy n= xx; France n= xx; UK n=xx; Poland n= xx; ).

\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph

...

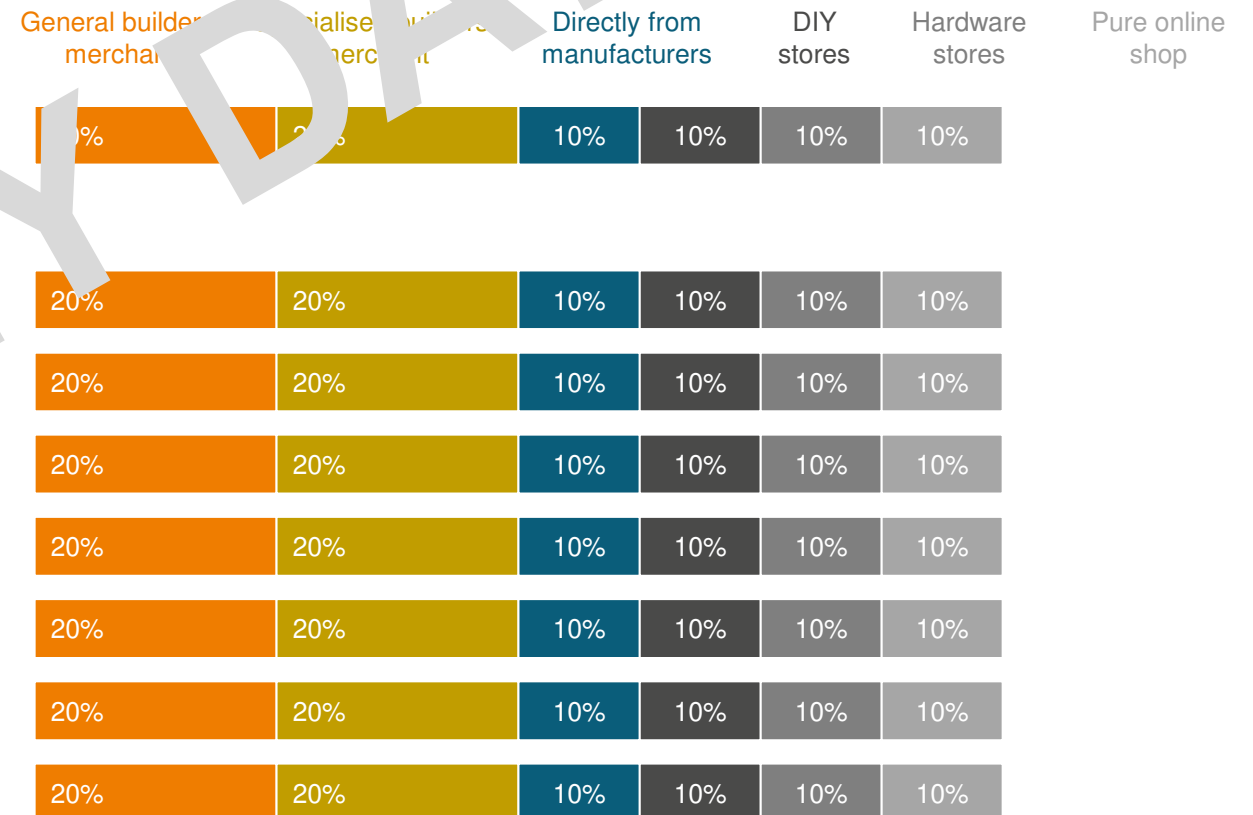
### Share of handymen purchasing power tools per country

Q: Do you/does your company buy the following product groups?



### Most common purchase channels for power tools per country

Q: Where do you mostly buy tiles for the jobs you do?



\* Question on purchase channels asked only if purchasing paint products: n=xx (Netherlands n= xx; Germany n= xx; Spain n= xx; Italy n= xx; France n= xx; UK n=xx; Poland n= xx; ).

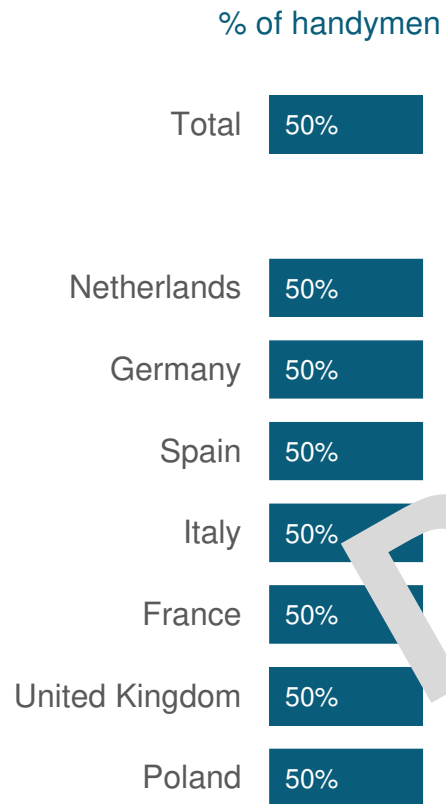
\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph



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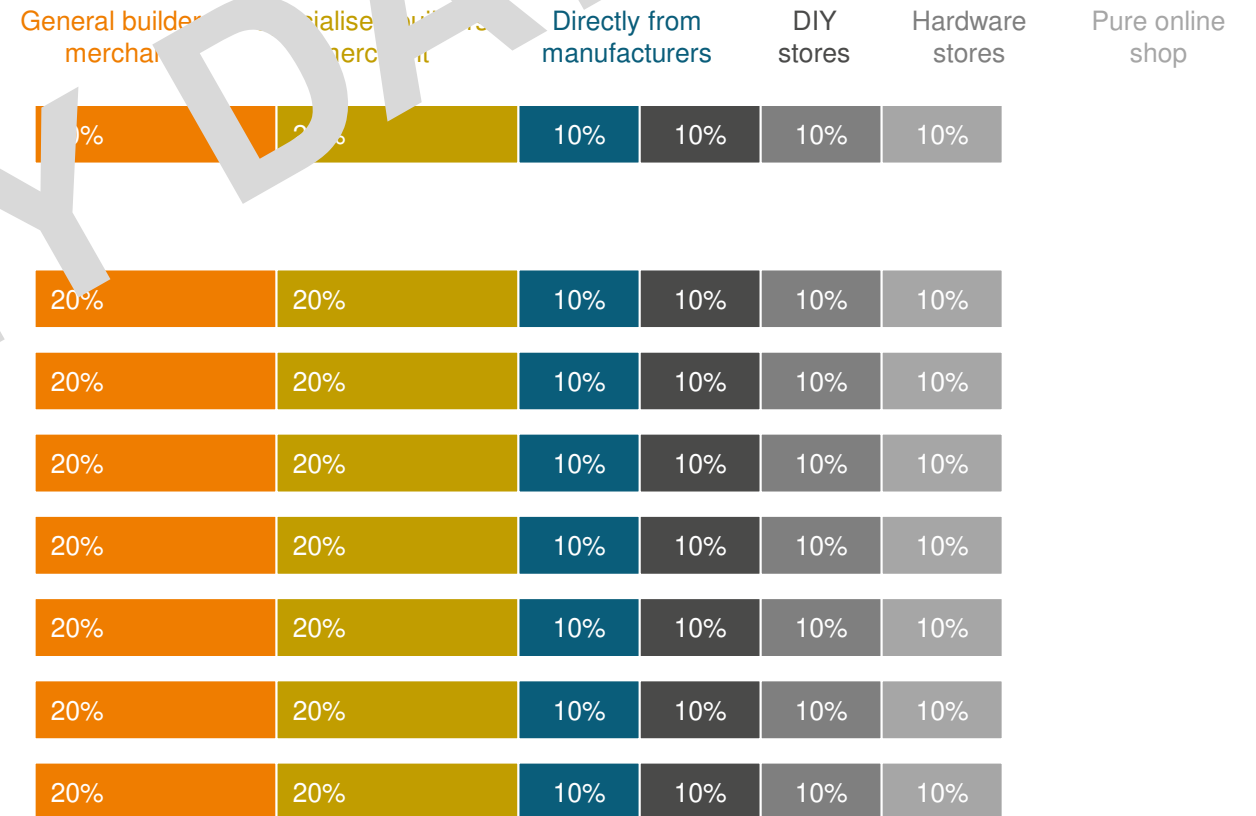
### Share of handymen purchasing roofing products per country

Q: Do you/does your company buy the following product groups?



### Most common purchase channels for roofing products per country

Q: Where do you mostly buy tiles for the jobs you do?



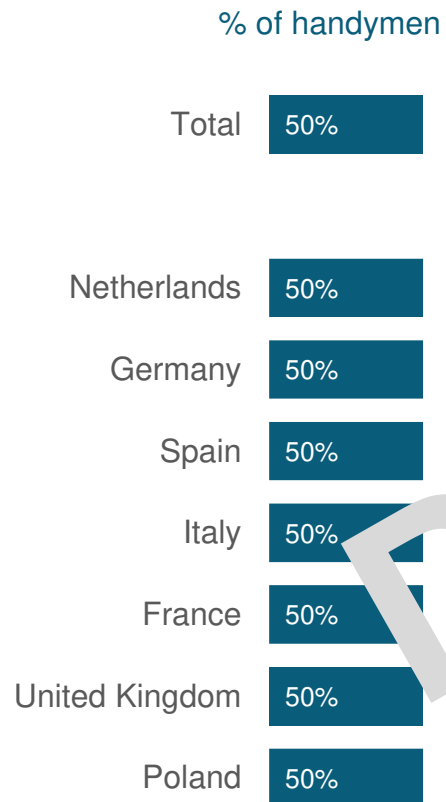
\* Question on purchase channels asked only if purchasing paint products: n=xx (Netherlands n= xx; Germany n= xx; Spain n= xx; Italy n= xx; France n= xx; UK n=xx; Poland n= xx; ).

\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph

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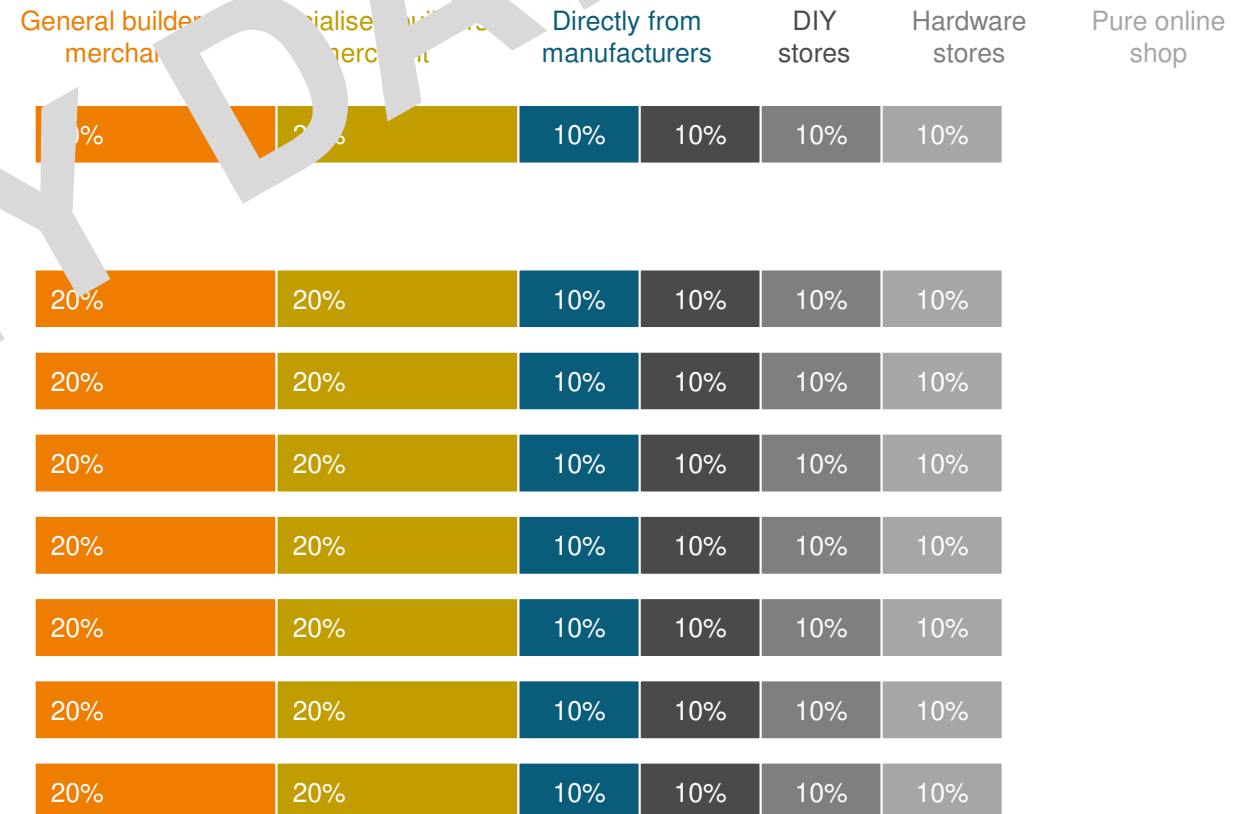
### Share of handymen purchasing facade products per country

Q: Do you/does your company buy the following product groups?



### Most common purchase channels for facade products per country

Q: Where do you mostly buy tiles for the jobs you do?

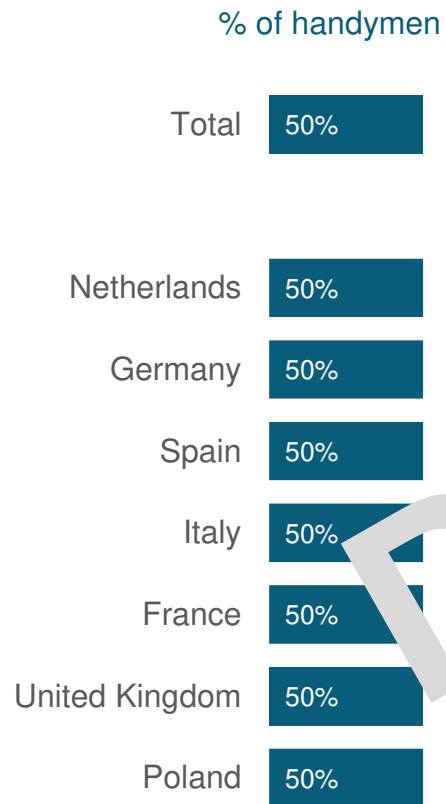


\* Question on purchase channels asked only if purchasing paint products: n=xx (Netherlands n= xx; Germany n= xx; Spain n= xx; Italy n= xx; France n= xx; UK n=xx; Poland n= xx; ).

\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph

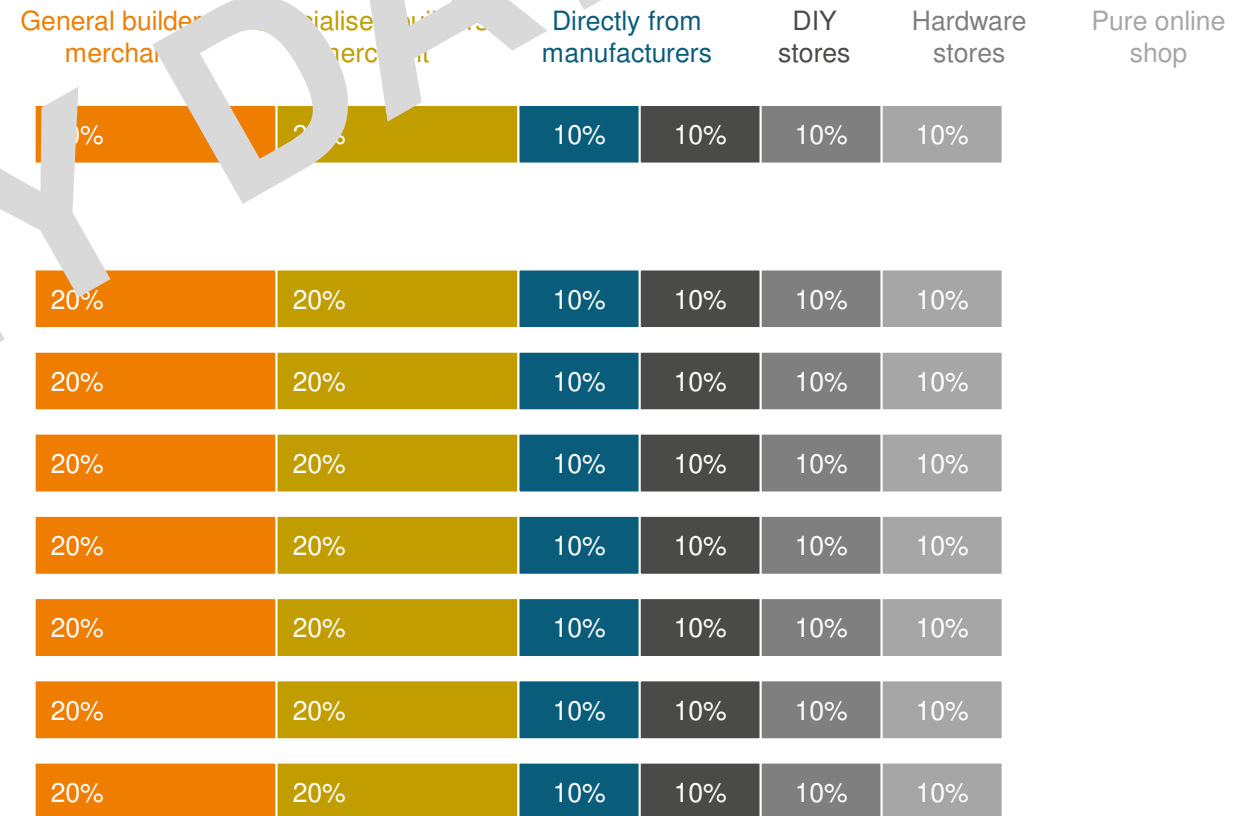
Share of handymen purchasing insulation materials per country

Q: Do you/does your company buy the following product groups?



Most common purchase channels for insulation materials per country

Q: Where do you mostly buy tiles for the jobs you do?



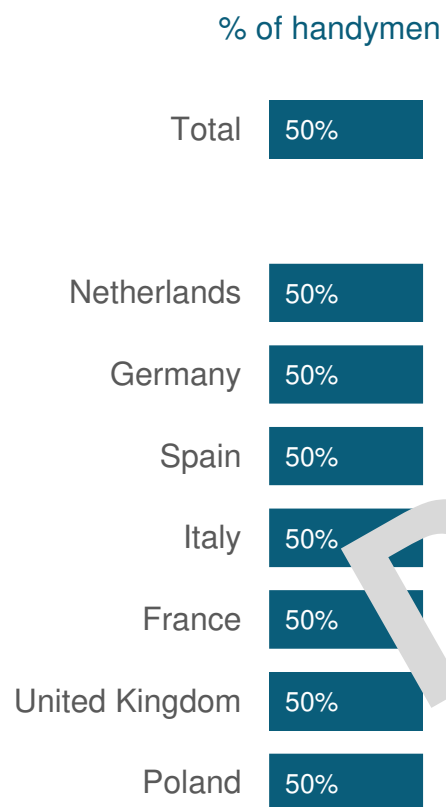
\* Question on purchase channels asked only if purchasing paint products: n=xx (Netherlands n= xx; Germany n= xx; Spain n= xx; Italy n= xx; France n= xx; UK n=xx; Poland n= xx; ).

\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph

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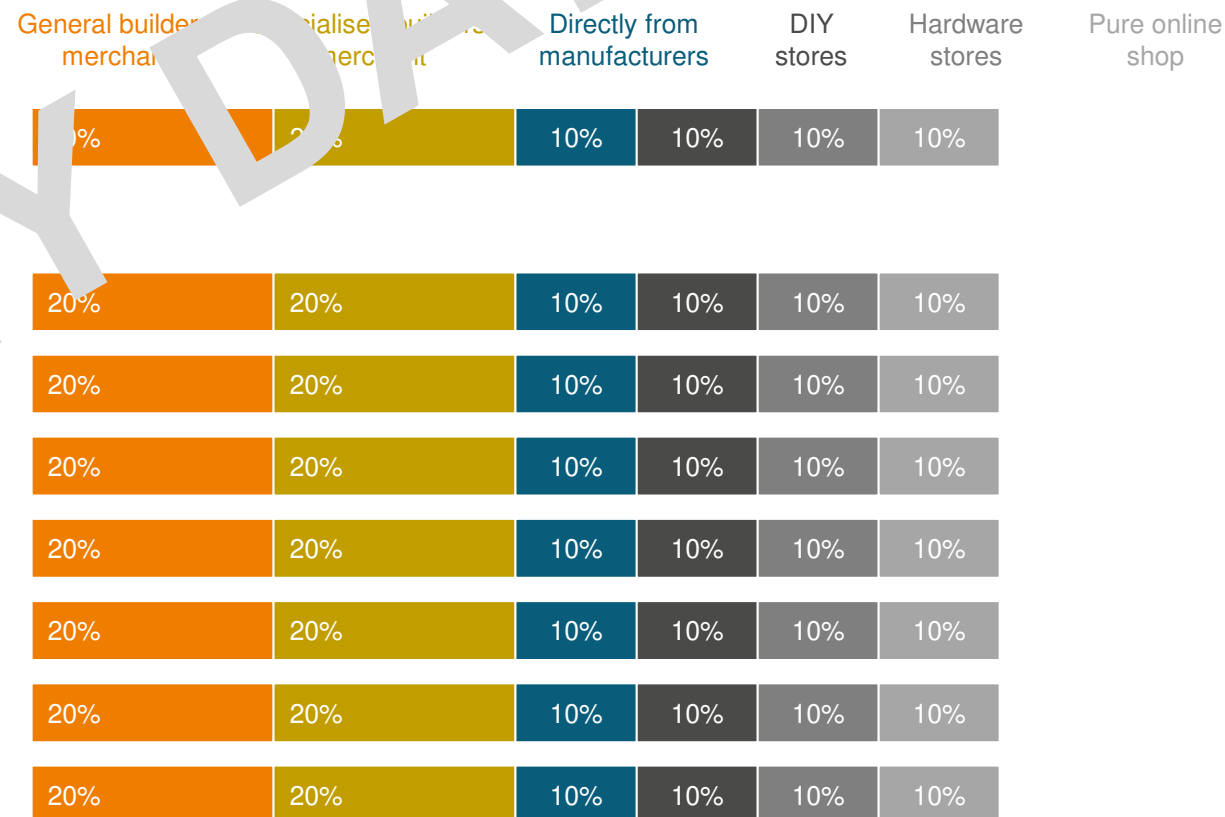
### Share of handymen purchasing sanitary products per country

Q: Do you/does your company buy the following product groups?



### Most common purchase channels for sanitary products per country

Q: Where do you mostly buy tiles for the jobs you do?

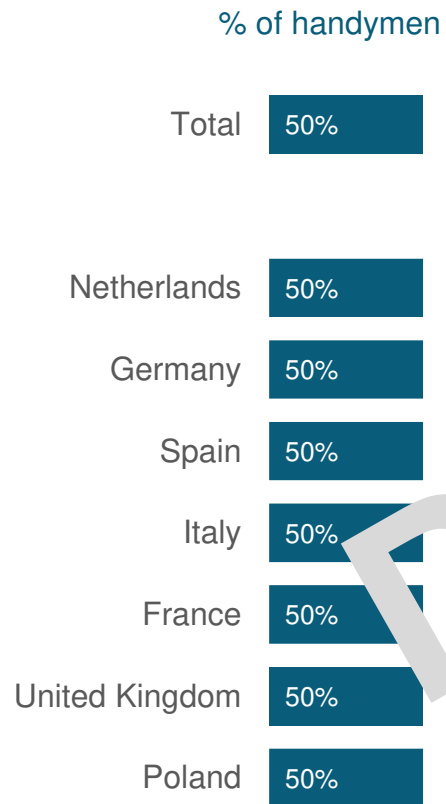


\* Question on purchase channels asked only if purchasing paint products: n=xx (Netherlands n= xx; Germany n= xx; Spain n= xx; Italy n= xx; France n= xx; UK n=xx; Poland n= xx; ).

\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph

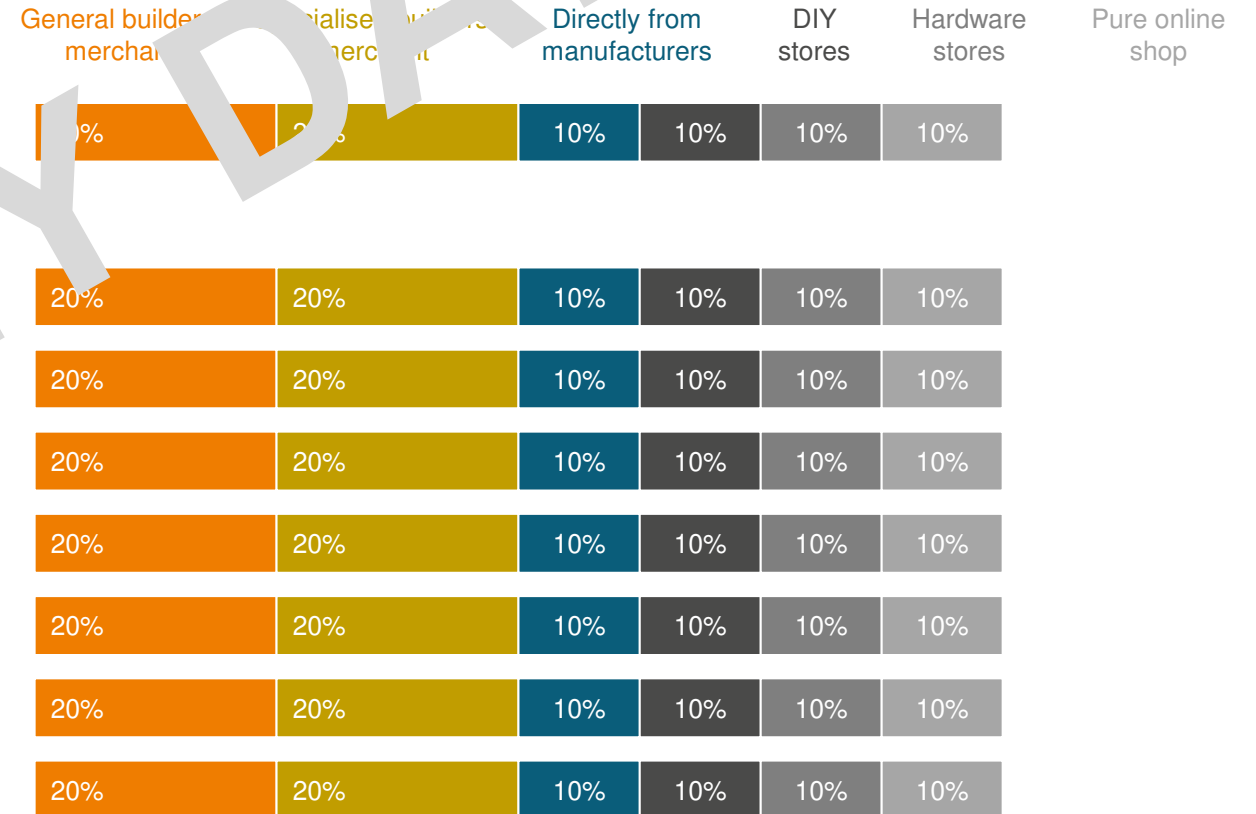
Share of handymen purchasing electrical materials per country

Q: Do you/does your company buy the following product groups?



Most common purchase channels for electrical materials per country

Q: Where do you mostly buy tiles for the jobs you do?



\* Question on purchase channels asked only if purchasing paint products: n=xx (Netherlands n= xx; Germany n= xx; Spain n= xx; Italy n= xx; France n= xx; UK n=xx; Poland n= xx; ).

\* The total share of the purchase channels does not add up to 100% because the „other“, „don't know“ and „not one specific“ categories are not shown in the graph

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**Employees distribution in 2022**

Q: Yourself included, how many full-time employees does your company have in total?

