

A painter's workspace featuring a white wall, a silver step ladder, two open paint cans, and a brush on a white drop cloth.

Painter Insight Monitor 2023

Theme topic: Purchase behaviour

A product by **USP** Marketing Consultancy

Painter Insight Monitor 2023

THE GOAL

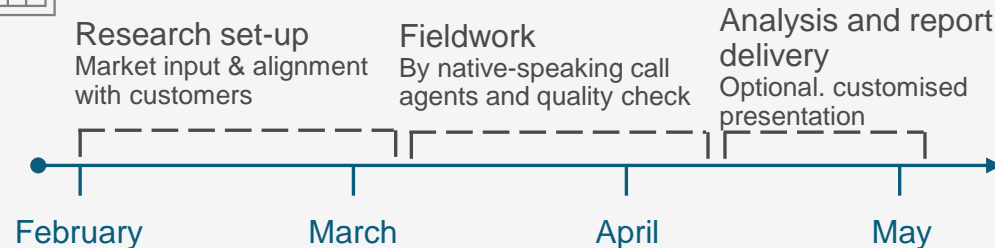
The Painter Insight Monitor provides key insights that help manufacturers and others to understand the business and behaviour of the painter. This is done by means of 1,950 phone interviews, divided over 11 major European markets.

THE RESEARCH TOPICS 2023

- 1. Profile** of the professional painter and **trend tracking** (recurring yearly)
- 2. Purchase behaviour**
- 3. Brand** performance scans (recurring yearly; provided as a separate report file)



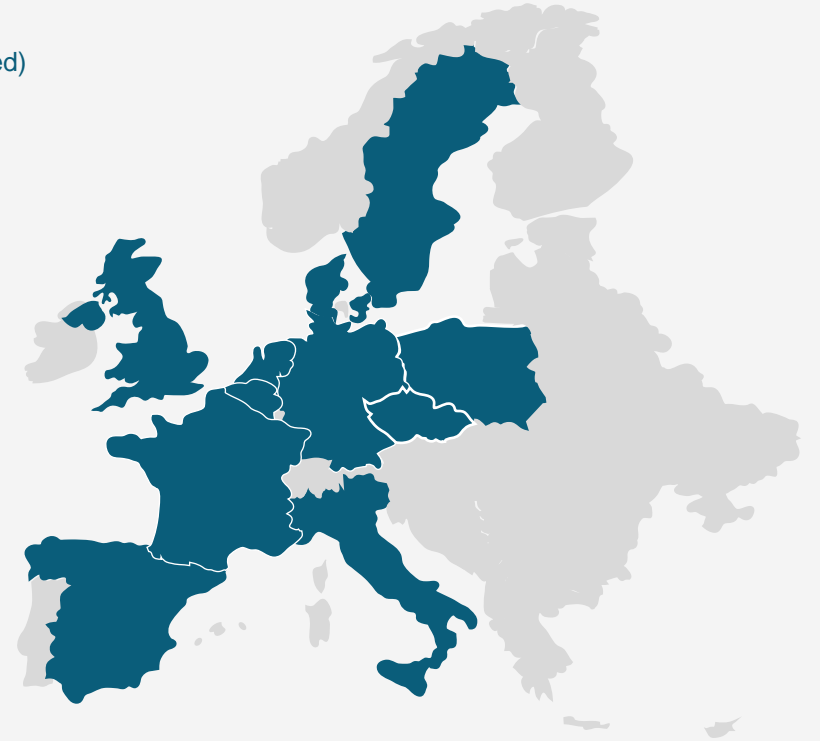
TIMELINE



COUNTRY SCOPE

(number of interviews conducted)

UK (200)
Germany (200)
The Netherlands (151)
Belgium (133)
France (200)
Spain (200)
Italy (161)
Poland (208)
Sweden (150)
Denmark (150)
Czech Republic (152)



PROJECT TEAM



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Management summary

Profile of the Painter

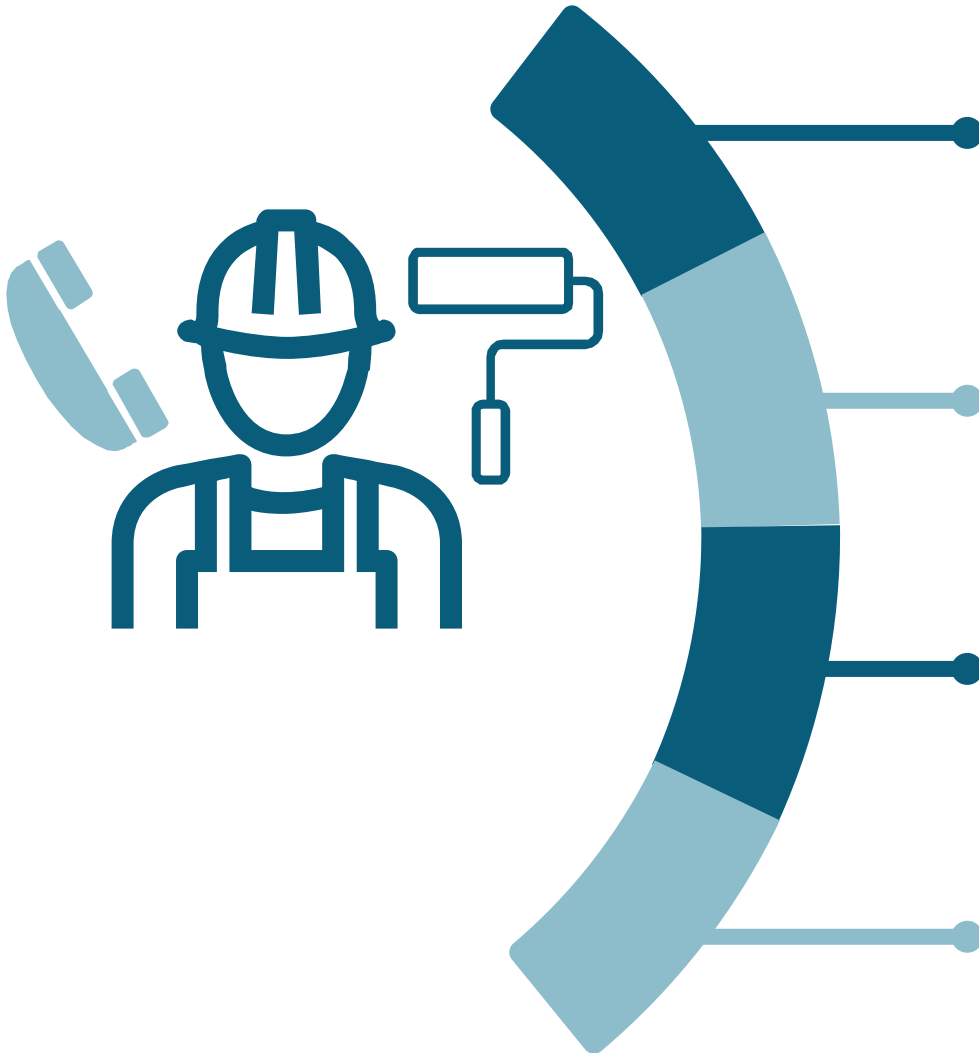
Sustainability

Product usage and online buying behaviour

Appendix



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.

... whilst ensuring a certain degree of paint specialisation

Companies that indicate to spend less than 10% of their working time on painting are not eligible for participation. On average, interviewed companies spend 79% of their time on painting.

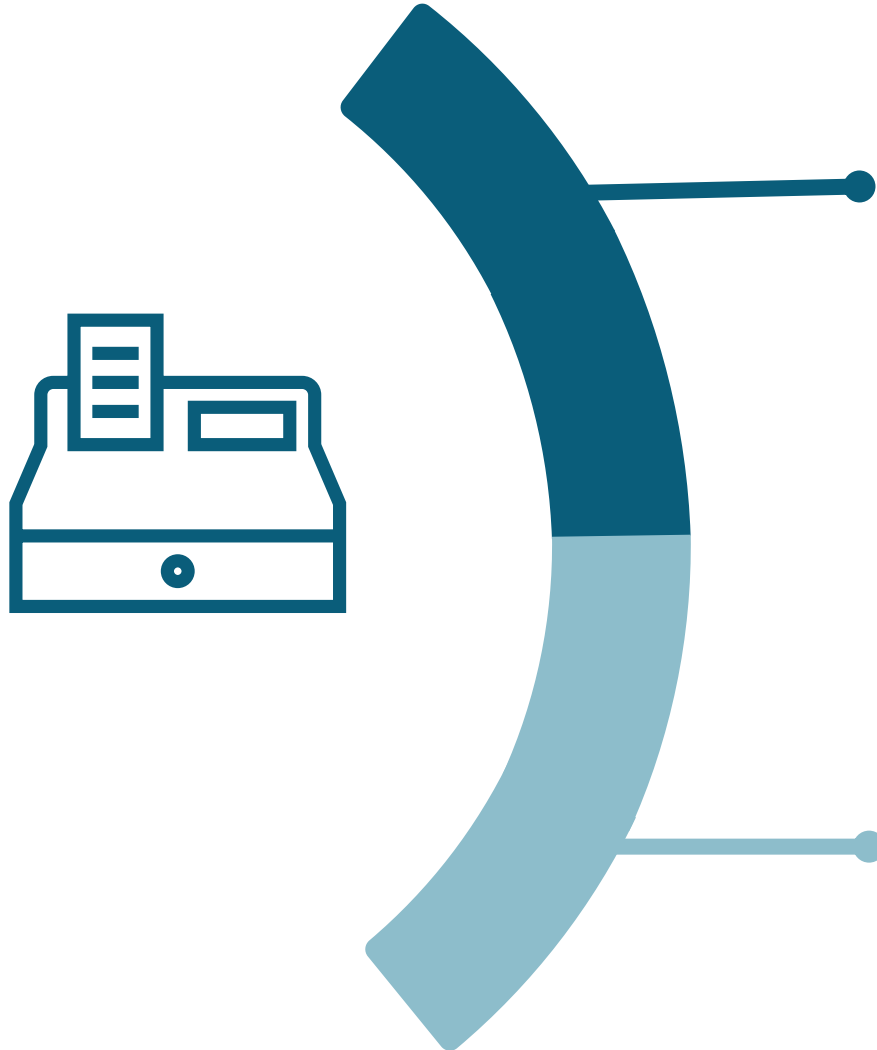
... selected from a country-representative database

USP possesses an updated, international database of 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 to provide insights that can be relied on. These phone calls are made by fixed fieldwork partners, located in the respective countries.

About the theme topic: Purchase Channels



Investigating the Purchase channel topic...

This year we investigate the topic of purchase channels by asking painters about their purchasing of professional products used in their daily job.

In the report, we will make a clear difference between the different types of purchase channels: (general building materials wholesaler, specialised wholesalers, hardware & DIY stores, pure online shops (e.g. Amazon), and directly from the manufacturer/ service centres.

...allows for better understanding of painters' purchasing behaviour and their purchasing preferences

To provide insights in this, we looked at this topic from various angles and mapped out:

- The main purchase criteria per product group,
- The purchase channels used per product category by the customers,
- The ways of ordering products,
- The ways of delivery

Key insights



[Recommendation]

❑ Lorem ipsum dolor sit amet.

Et dolore explicabo est quidem minus non doloribus voluptas eum iusto sunt eos similique quos eos magni temporibus id omnis accusamus. Ut numquam repudiandae et aperiam omnis eum pariatur sunt est eligendi sunt est illo quia qui accusamus aperiam ut sint nemo.




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❑ Et quod nobis eos quasi neque quis doloribus magnam

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Purchase criteria and channels per product category

 products  consumables  power tools

50% 50% 50%

indicates **quality** as the main buying criterion.

40% 40% 40%

pays **more** for the best quality product

60% 60% 60%

Indicates a **specialised store** as the main purchase point.

50% 50% 50%

Indicates a **pure online shop** as the main purchase point.

80% 80% 80%

goes to **stores where the preferred brand** is available

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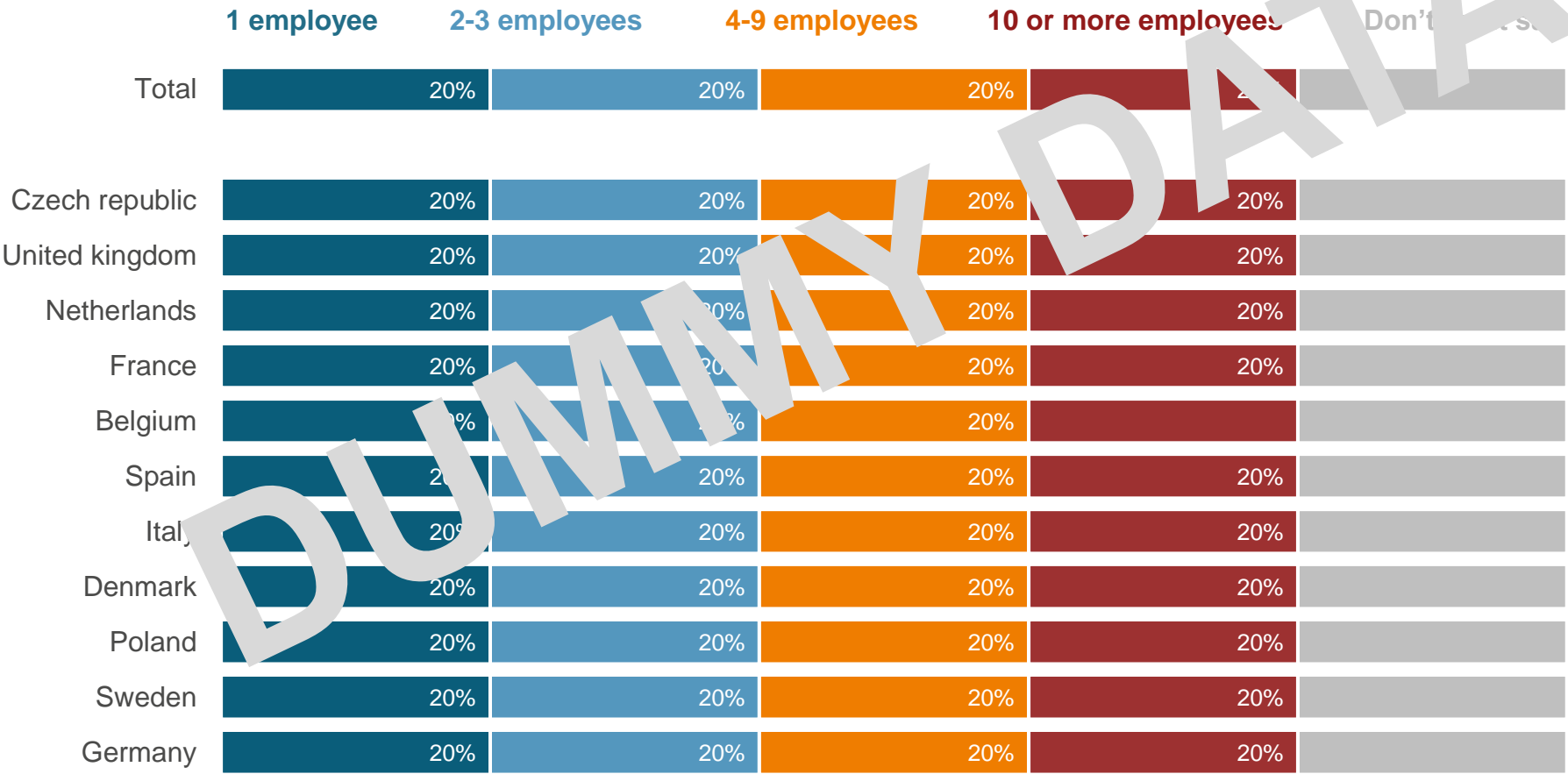
Appendix



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

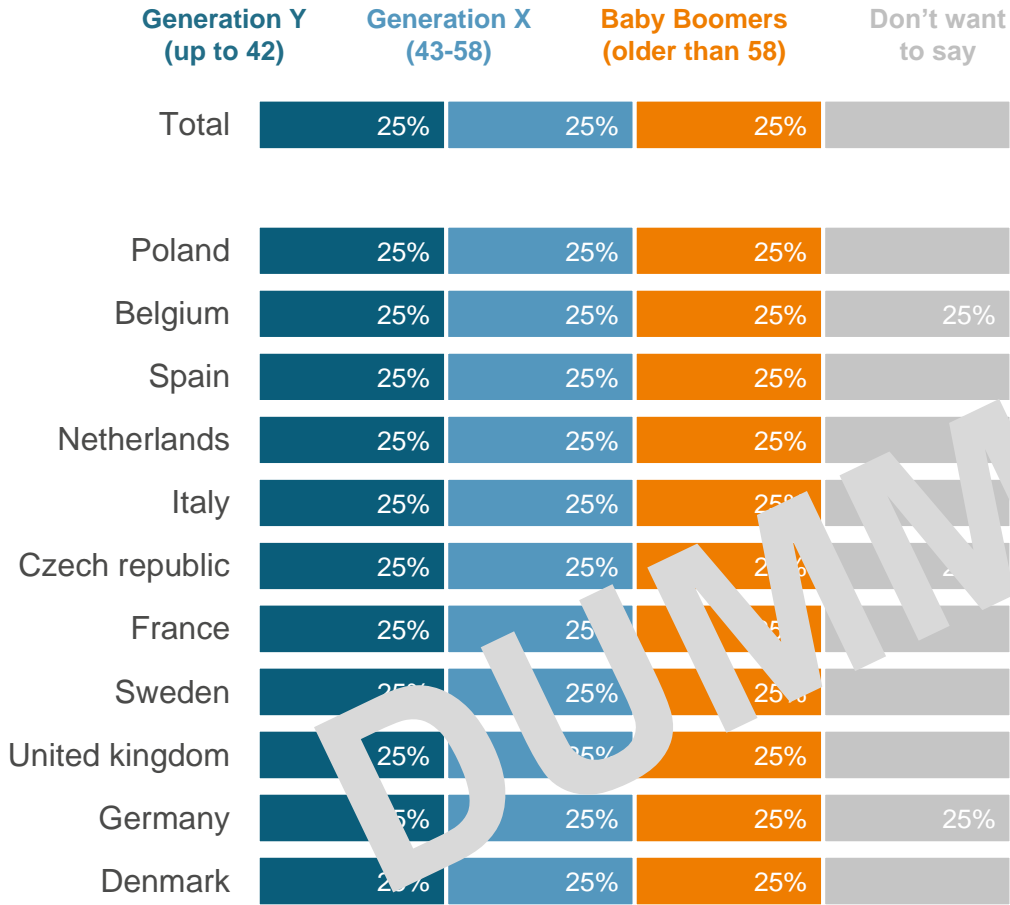
Question: Yourself included, how many full time employees does your company have in total, in all branches?



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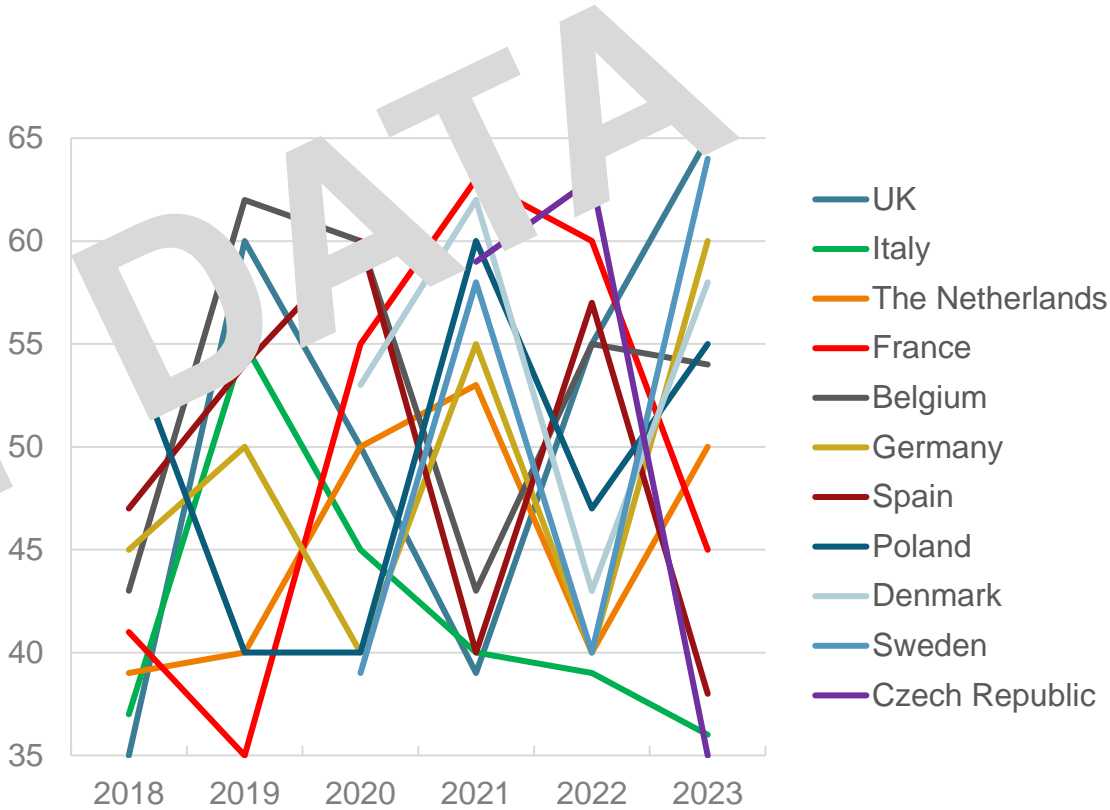
Age distribution in 2023

Question: What is your age?



Age distribution - Trend

Question: What is your age?



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Years of experience in 2023

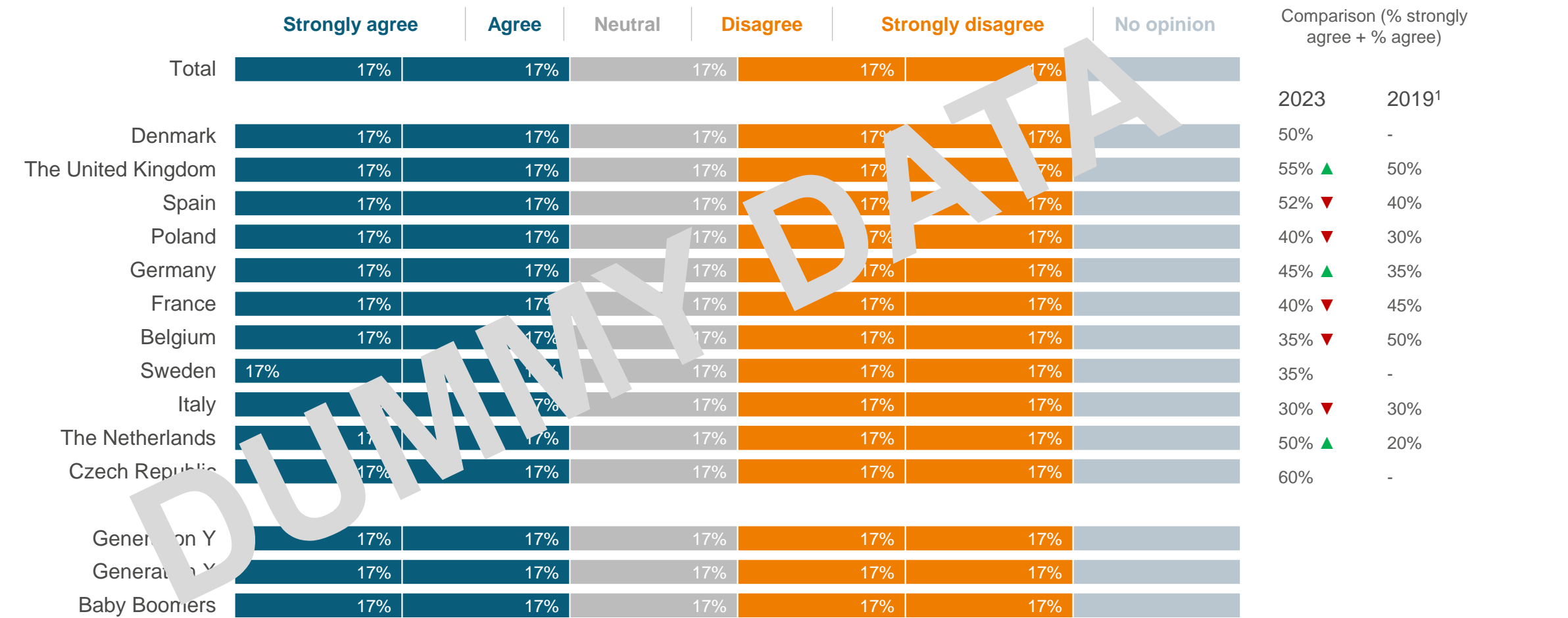
Question: And how many years of experience do you have as a professional painter?

	Up to 15	16-25	26-35	36-45	More than 45	Will not say	Average
Total	17%	17%	17%	17%	17%		16,7
Poland	17%	17%	17%	17%	17%		16,7
France	17%	17%	17%	17%	17%		16,7
Spain	17%	17%	17%	17%	17%		16,7
Belgium	17%	17%	17%	17%	17%	17%	16,7
Czech republic	17%	17%	17%	17%	17%	17%	16,7
Netherlands	17%	17%	17%	17%	17%		16,7
Italy	17%	17%	17%	17%	17%		16,7
United kingdom	17%	17%	17%	17%	17%		16,7
Denmark	17%	17%	17%	17%	17%		16,7
Sweden	17%	17%	17%	17%	17%		16,7
Germany	17%	17%	17%	17%	17%		16,7
Generation Y	17%	17%	17%				16,7
Generation X	17%	17%	17%	17%			16,7
Baby Boomers	17%	17%	17%	17%	17%		16,7

...

The role of internet in business

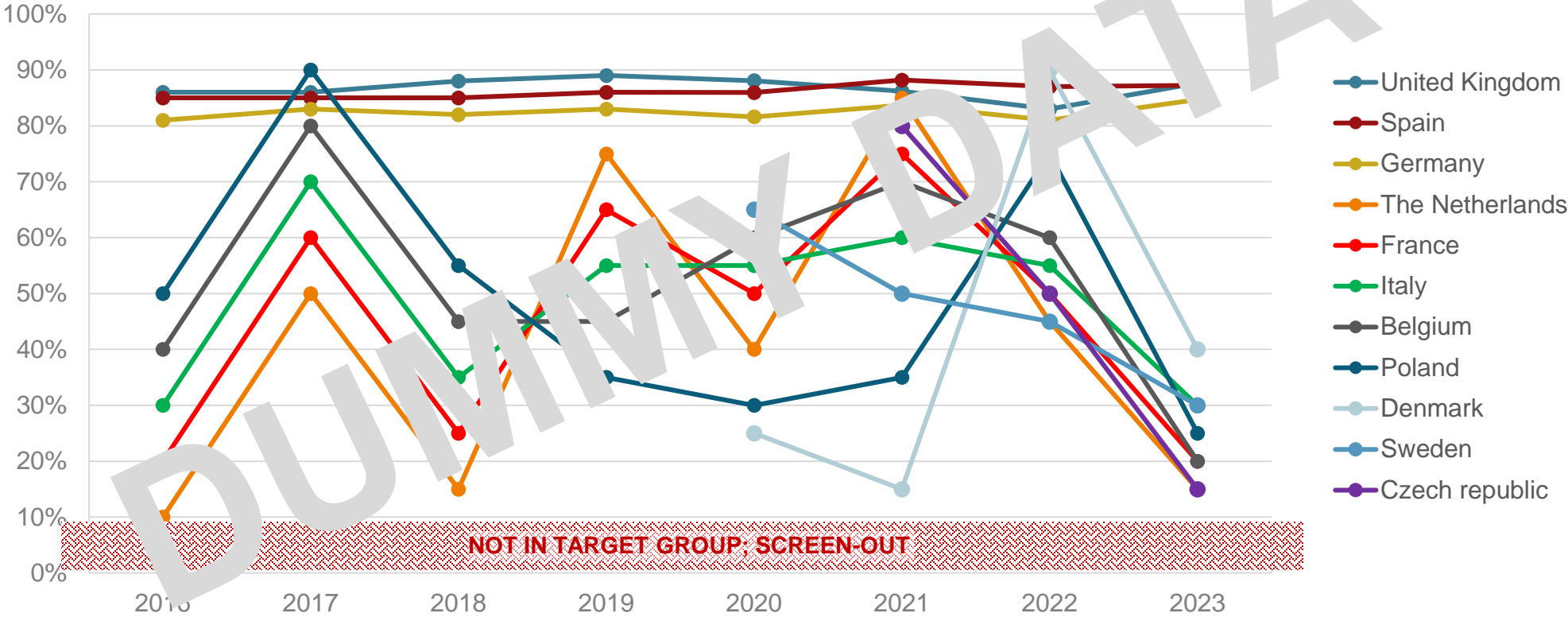
Statement: The internet plays an important role in running my business



¹ There are no measurements for Denmark, Sweden and the Czech Republic in 2019

...

Time spent on painting activities (%)
Question: What share of their working time do your company's craftsmen spend on painting jobs?



...

Other jobs next to painting
Question: What other jobs next to painting are conducted by your company?

	Total	The United Kingdom	The Netherlands	Belgium	Germany	Poland	France	Spain	Italy	Denmark	Sweden	Czech Republic
None (100% painting)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
Wall-papering	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
Plastering	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
Flooring	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
Dry-wall installation	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%
Tiling	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%
Carpentry/Joinery	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%
External Thermal Insulation & Composite Systems (ETICS)	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%
Glass fitting	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%
Average number of other jobs	1.3	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0

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Building types

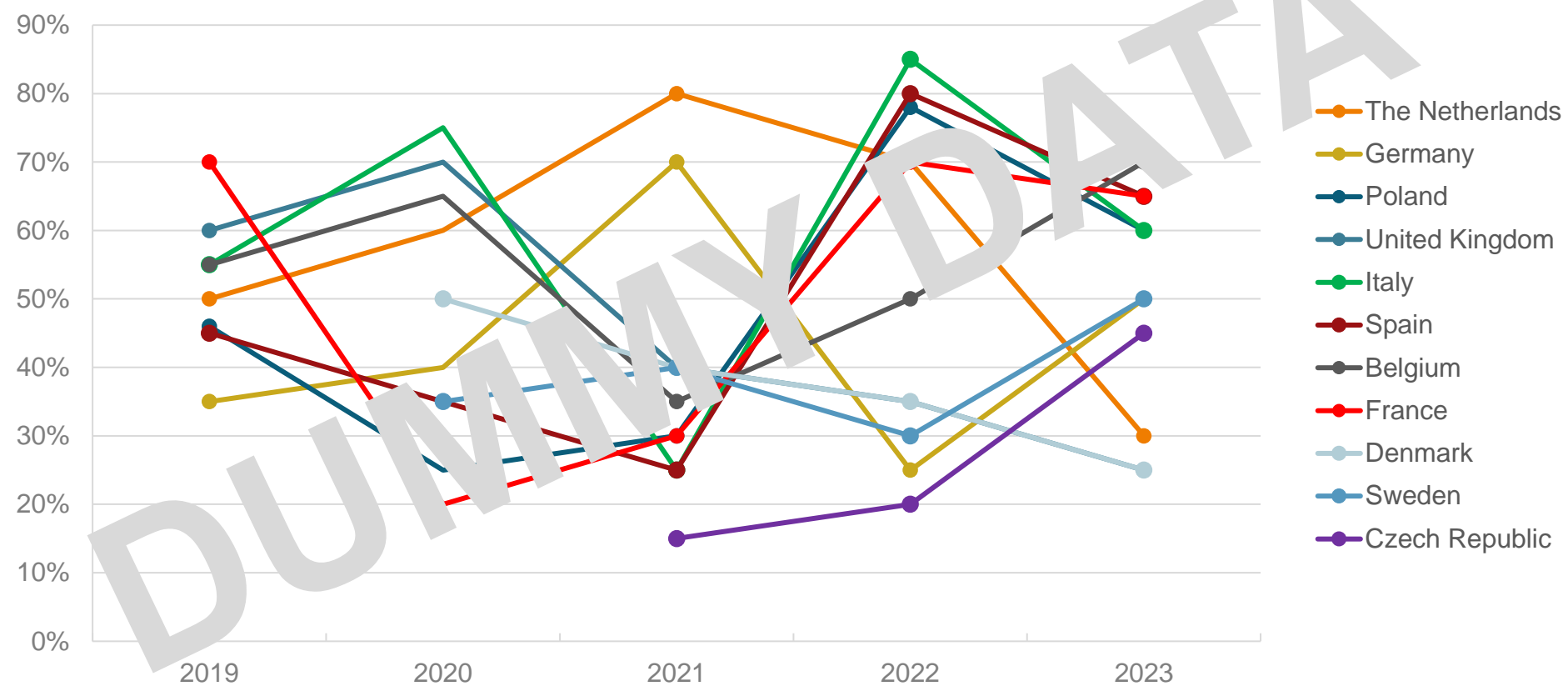
Question: Can you divide your company's total painting jobs (100%) over ... ?

	Residential New Build	Residential Renovation	Non-residential New Build	Non-residential Renovation
Total	25%	25%	25%	25%
Poland	25%	25%	25%	25%
Czech Republic	25%	25%	25%	25%
Italy	25%	25%	25%	25%
Belgium	25%	25%	25%	25%
Germany	25%	25%	25%	25%
Spain	25%	25%	25%	25%
Sweden	25%	25%	25%	25%
The Netherlands	25%	25%	25%	25%
France	25%	25%	25%	25%
Denmark	25%	25%	25%	25%
The United Kingdom	25%	25%	25%	25%
1 employee	25%	25%	25%	25%
2 - 3 employees	25%	25%	25%	25%
4 - 9 employees	25%	25%	25%	25%
10 or more employees	25%	25%	25%	25%

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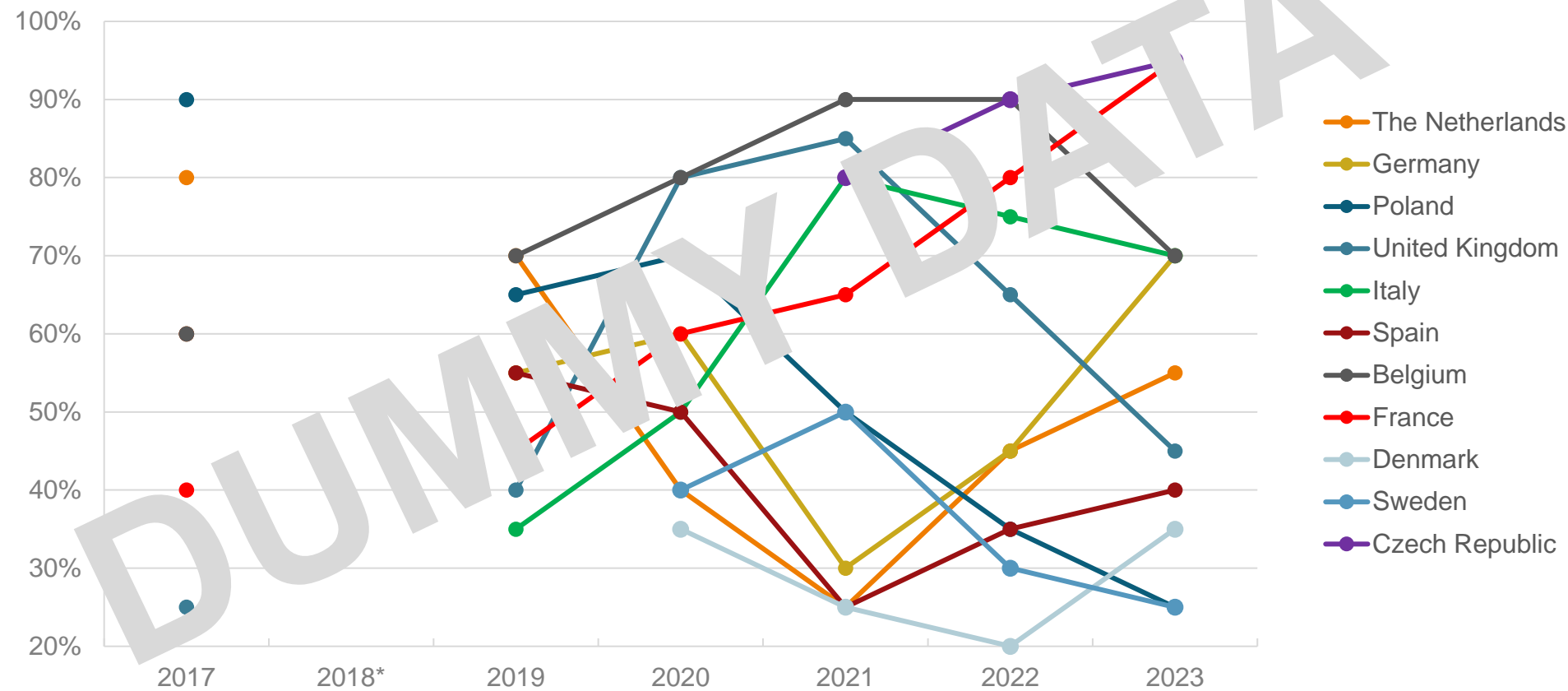
Painters who expect more jobs (%) – **Trend**
 Statement: I expect my business will have more paint jobs in the coming year



...

Painters who perceive a shortage of skilled labour (%) - Trend

Statement: There is a shortage of skilled professional painters in my country



* Question not asked in 2018

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Importance of sustainability for the painters

Statement: When buying paint, the sustainability of a paint product is a decisive reason

Comparison (% strongly agree + % agree)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	No opinion	2023	2022
Total	17%	17%	17%	17%	17%	17%	60%	60%
Poland	17%	17%	17%	17%	17%	17%	70%▲	70%
Belgium	17%	17%	17%	17%	17%	17%	70%▲	70%
France	17%	17%	17%	17%	17%	17%	80%▲	80%
Italy	17%	17%	17%	17%	17%	17%	70%▼	70%
The Netherlands	17%	17%	17%	17%	17%	17%	60%▼	60%
Sweden	17%	17%	17%	17%	17%	17%	50%▼	50%
The United Kingdom	17%	17%	17%	17%	17%	17%	60%▲	60%
Czech Republic	17%	17%	17%	17%	17%	17%	50%▼	50%
Spain	17%	17%	17%	17%	17%	17%	40%▼	40%
Denmark	17%	17%	17%	17%	17%	17%	30%▼	30%
Germany	17%	17%	17%	17%	17%	17%	20%▼	20%
Baby Boomers	17%	17%	17%	17%	17%	17%		
Generation X	17%	17%	17%	17%	17%	17%		
Generation Y	17%	17%	17%	17%	17%	17%		

...

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Importance of sustainability for the clients

Statement: My customers ask me to use sustainable paint products

Comparison (% strongly agree + % agree)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	No opinion	2023	2022
Total	17%	17%	17%	17%	17%	17%	60%	60%
Poland	17%	17%	17%	17%	17%	17%	70%▲	70%
Belgium	17%	17%	17%	17%	17%	17%	70%▲	70%
France	17%	17%	17%	17%	17%	17%	80%▲	80%
Italy	17%	17%	17%	17%	17%	17%	70%▼	70%
The Netherlands	17%	17%	17%	17%	17%	17%	60%▼	60%
Sweden	17%	17%	17%	17%	17%	17%	50%▼	50%
The United Kingdom	17%	17%	17%	17%	17%	17%	60%▲	60%
Czech Republic	17%	17%	17%	17%	17%	17%	50%▼	50%
Spain	17%	17%	17%	17%	17%	17%	40%▼	40%
Denmark	17%	17%	17%	17%	17%	17%	30%▼	30%
Germany	17%	17%	17%	17%	17%	17%	20%▼	20%
Baby Boomers	17%	17%	17%	17%	17%	17%		
Generation X	17%	17%	17%	17%	17%	17%		
Generation Y	17%	17%	17%	17%	17%	17%		

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In each country, painters have their own interpretation of a sustainable paint product

Definition of sustainability [Top 7]

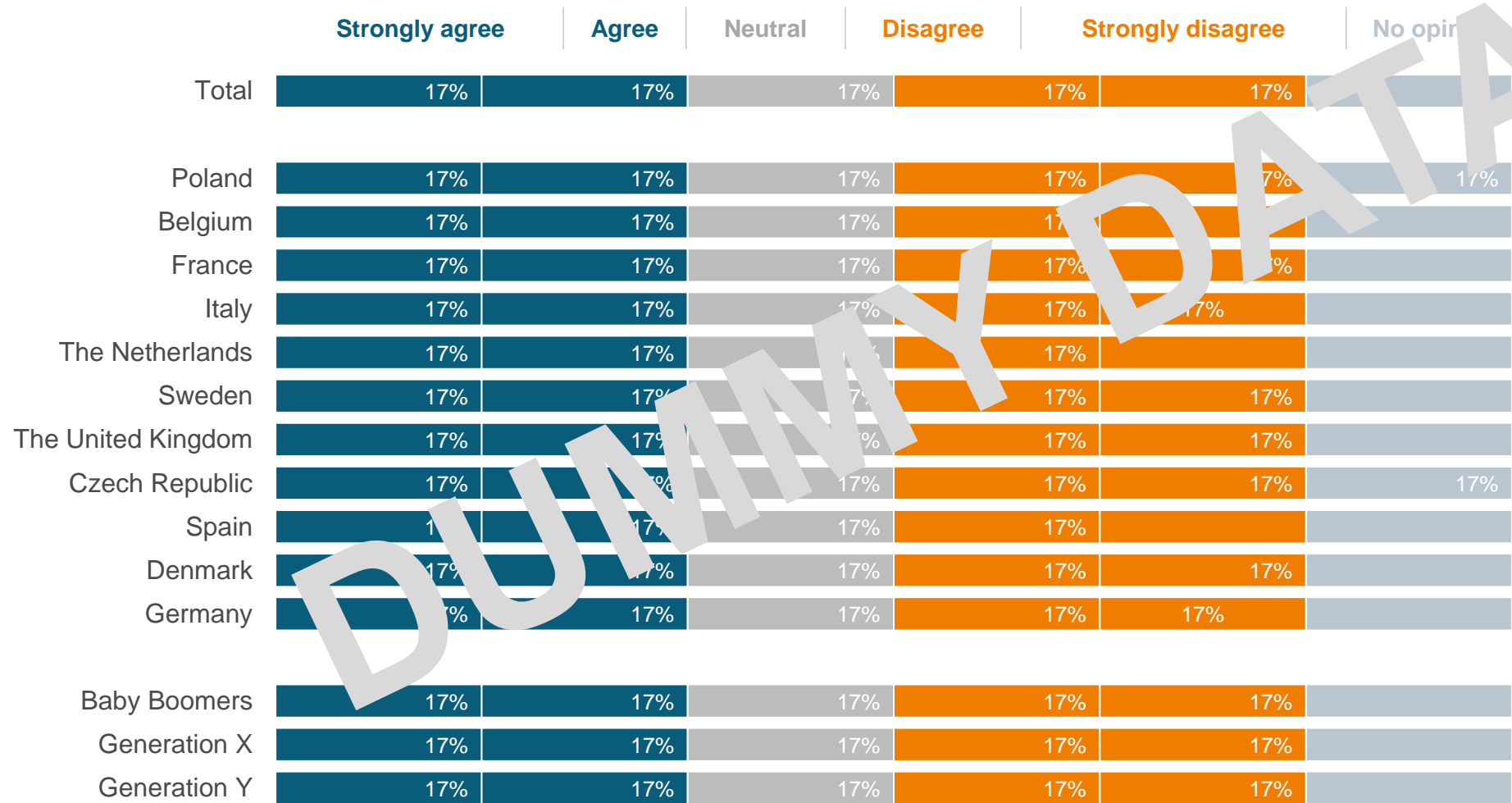
Question: What describes a sustainable paint product best according to you?

	Total	Belgium	Czech Republic	Denmark	France	Germany	Italy	Netherlands	Poland	Spain	Sweden	United Kingdom
Long-lasting/durable	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Environment-friendly	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Solvent-free	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Preservative-free	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Recyclability of packaging	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Recyclability of a product	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Bio-based	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Low VOC concentration	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

...

Preservative/solvent-free product purchase

Statement: When buying paint, I pay attention to whether the product is preservative/ solvent free

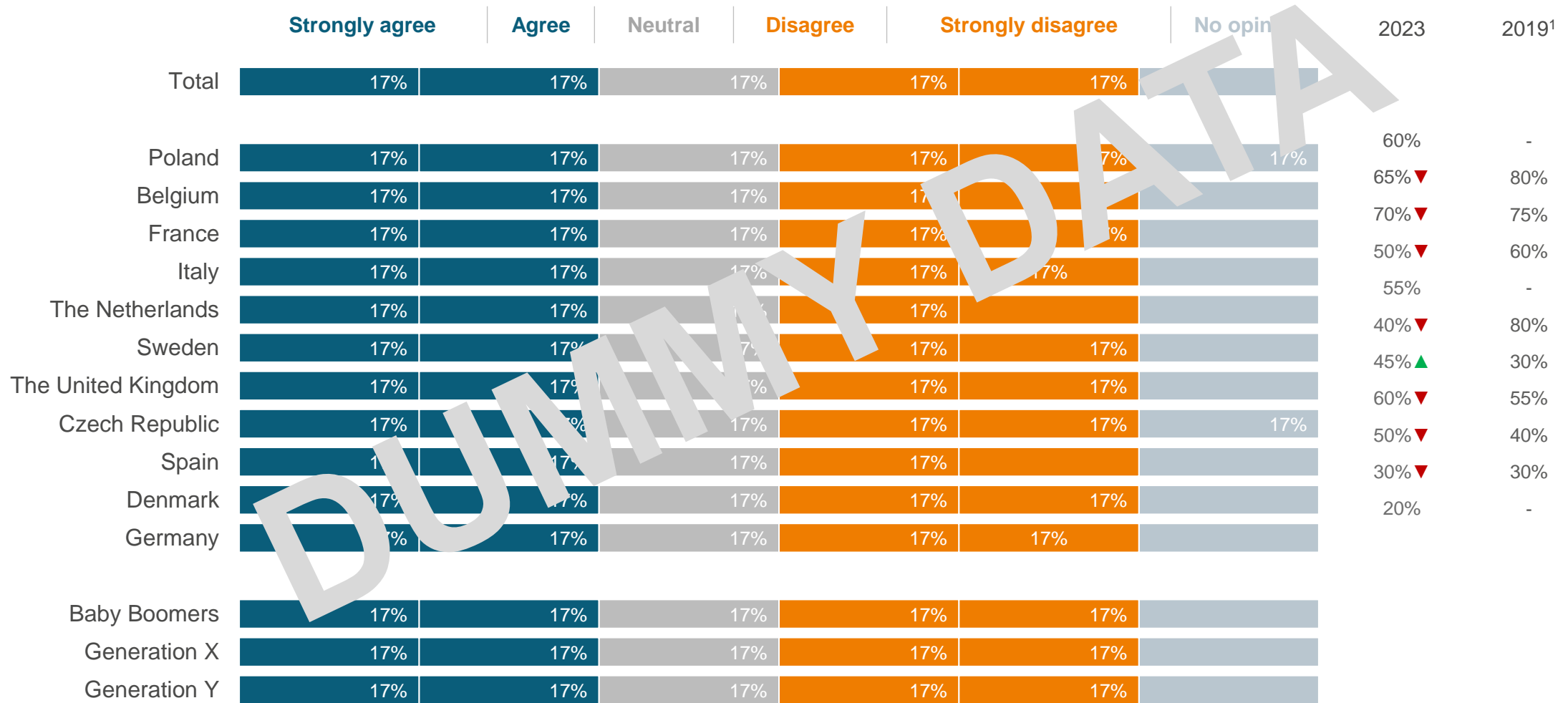


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Purchasing products with eco-labels
Statement: I pay attention to eco-labels when buying paint products

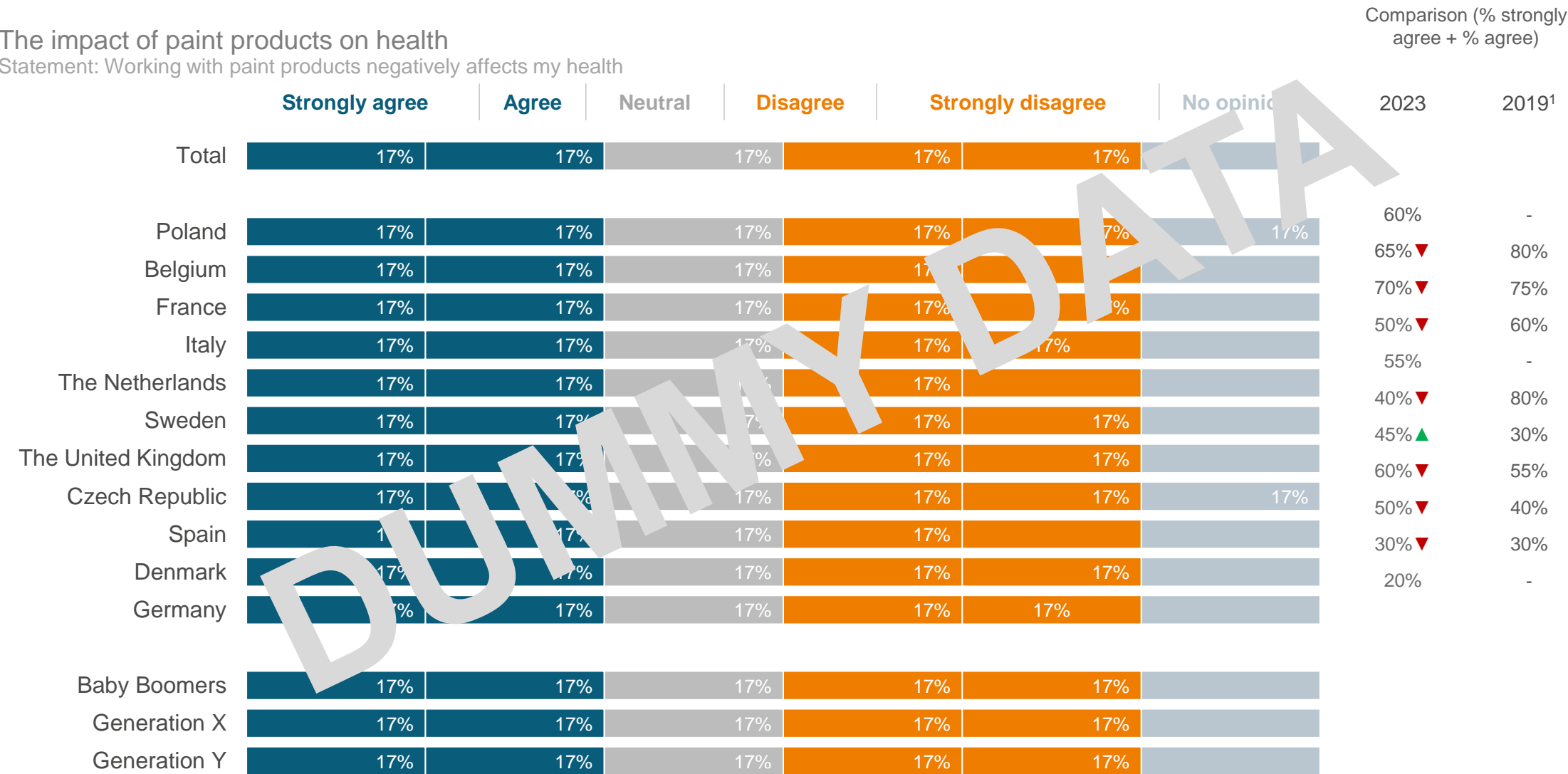
Comparison (% strongly agree + % agree)



¹ There are no measurements for Denmark, Sweden and the Czech Republic in 2019

...

The impact of paint products on health
Statement: Working with paint products negatively affects my health



¹ There are no measurements for Denmark, Sweden and the Czech Republic in 2019

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Introduction to the theme topic: Purchase behaviour

Product categories included

This year we investigate the topic of purchase channels by asking painters about their purchasing of professional products used in their daily job.

In this chapter, the provided data on this topic is based on the questions that are asked for 3 product groups: 1) paint products, 2) consumables, and 3) power tools. The product groups are selected based on whether the painters purchased different products.

When a respondent indicated purchasing at least one of the paint products (interior, exterior, and lacquers) in the last 12 months, they were asked about their purchase behaviour for the paint products

When a respondent indicated purchasing at least one of the consumables (tapes, brushes and rollers, sealants, wall fillers, and sand papers) in the last 12 months, they were asked about their purchase behaviour for the consumables.

When a respondent indicated purchasing at least one of the power tools (sanding machines, paint sprayers, and dust extractors) in the last 1-4 years, they were asked about their purchase behaviour for the power tools.

Purchase channels

The reported purchase channels are general wholesalers selling various builder materials, specialised wholesalers selling specialised products for painting, pure online shops such as Amazon, E-bay, DIY and hardware stores such as OBI, Leroy Merlin, Screwfix, Toolstation, and manufacturers.

The report structure

The data on behavioural statements is reported at total level with country and product category splits. The data on purchase channels, the way of ordering and delivery is reported separately per product group with country splits.

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Different types of purchase points visited

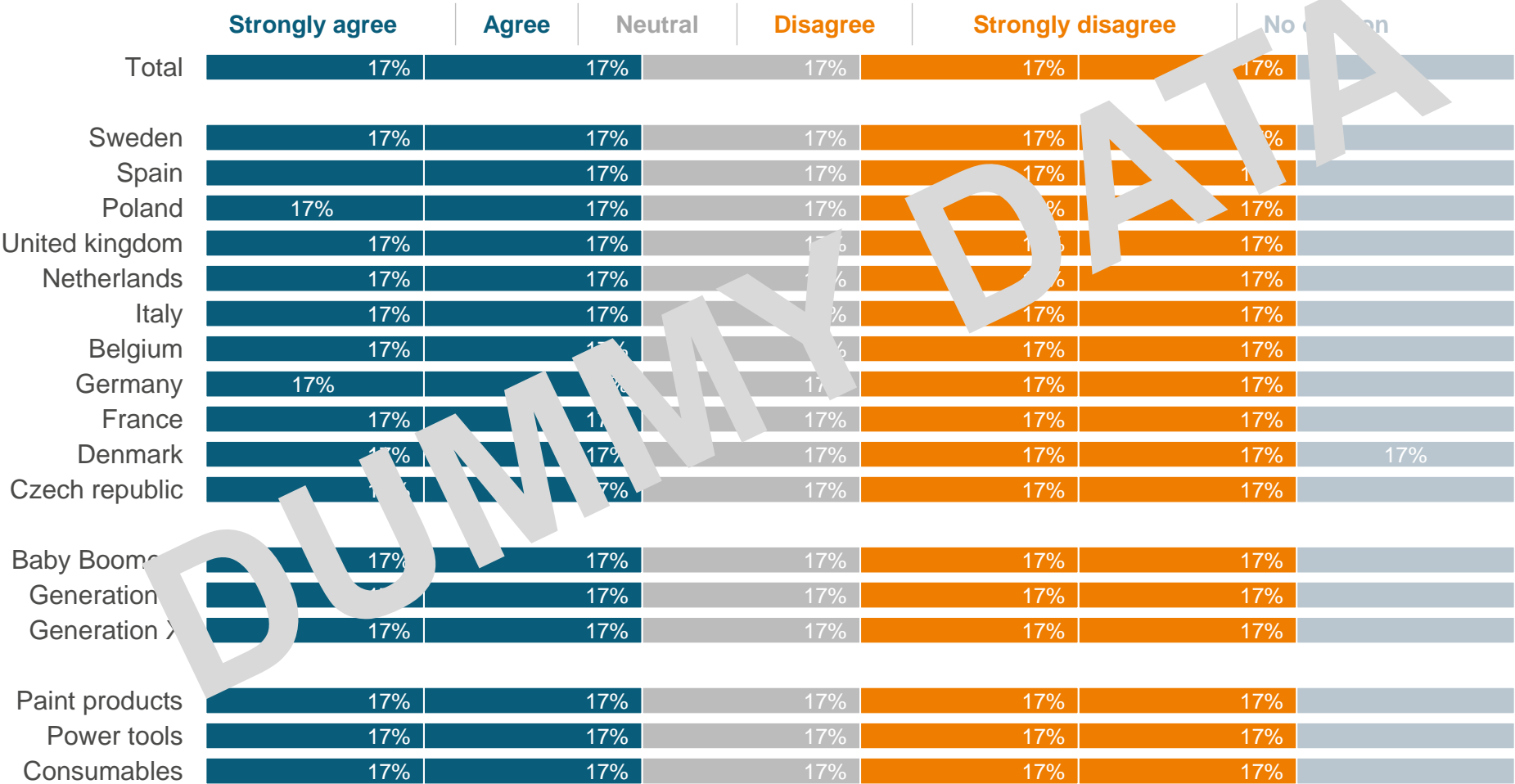
Question: On average how many different types of purchase points/ stores do you visit for the products that you use for your daily paint activities?

	1 type	2 types	3 types	> 3 types	Don't know	Average
Total	20%	20%	20%	20%	20%	2,0
Netherlands	20%	20%	20%	20%	20%	2,0
Denmark	20%	20%	20%	20%	20%	2,0
Italy	20%	20%	20%	20%	20%	2,0
Belgium	20%	20%	20%	20%	20%	2,0
France	20%	20%	20%	20%	20%	2,0
United kingdom	20%	20%	20%	20%	20%	2,0
Poland	20%	20%	20%	20%	20%	2,0
Sweden	20%	20%	20%	20%	20%	2,0
Spain	20%	20%	20%	20%	20%	2,0
Czech republic	20%	20%	20%	20%	20%	2,0
Germany	20%	20%	20%	20%	20%	2,0
1 employee	20%	20%	20%	20%	20%	2,0
2 - 3 employees	20%	20%	20%	20%	20%	2,0
4 - 9 employees	20%	20%	20%	20%	20%	2,0
10 or more employees	20%	20%	20%	20%	20%	2,0

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Store loyalty

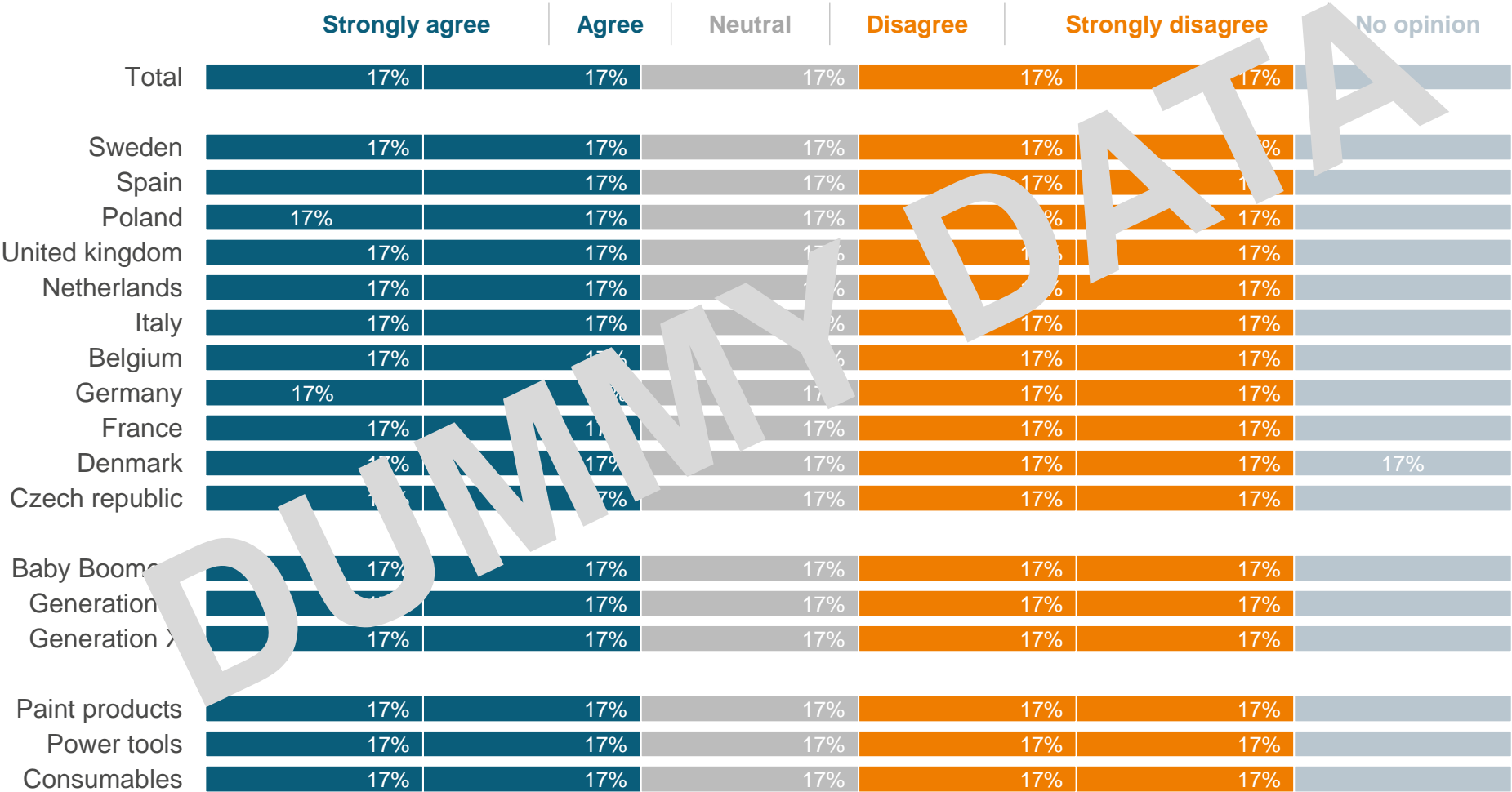
Statement: I buy any available brand that my preferred shop offers



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Brand loyalty

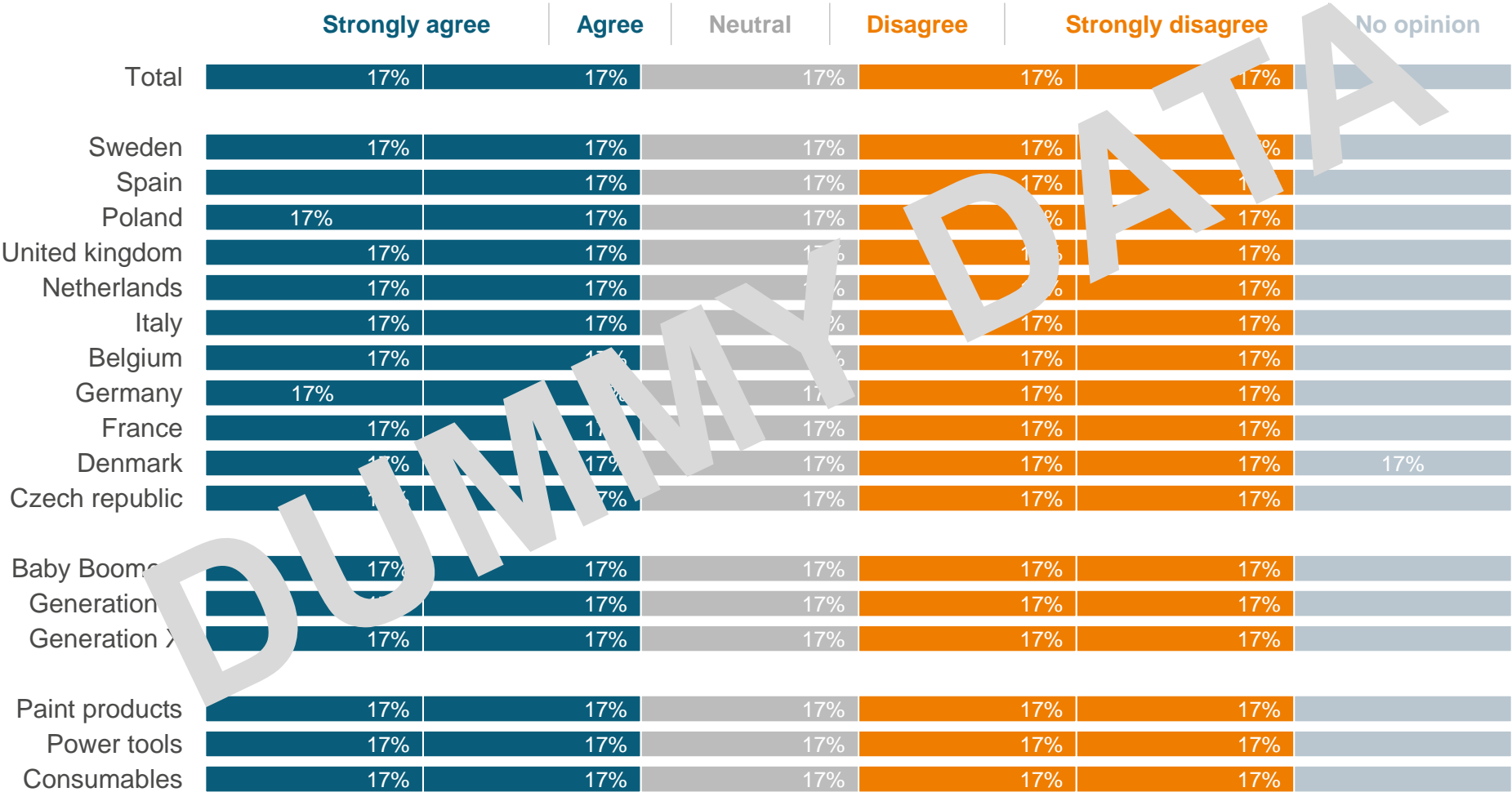
Statement: I always go to stores where my preferred brand is available



...

Store loyalty

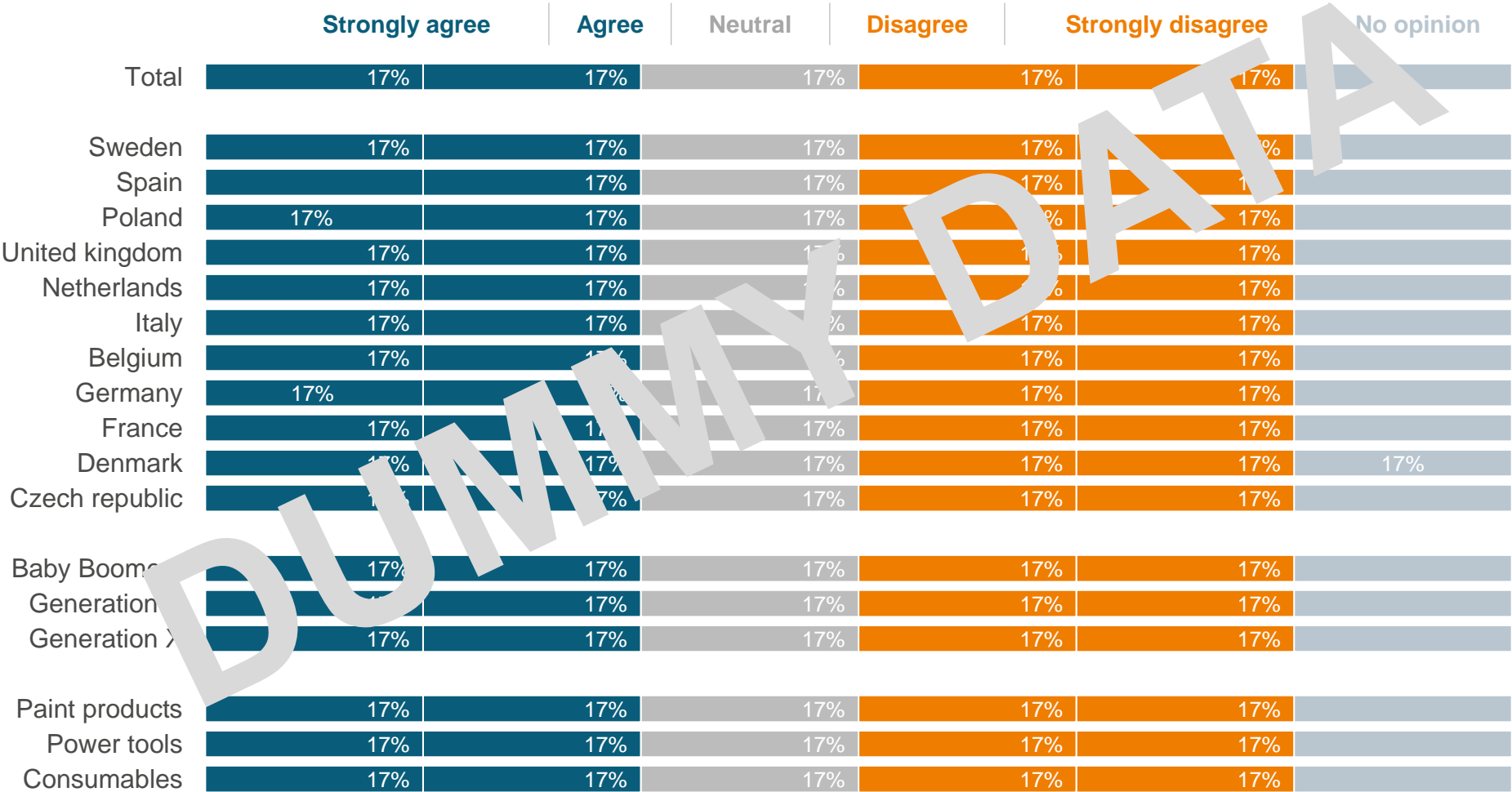
Statement: I always buy all my products and tools from the same purchase point



...

Quality over money

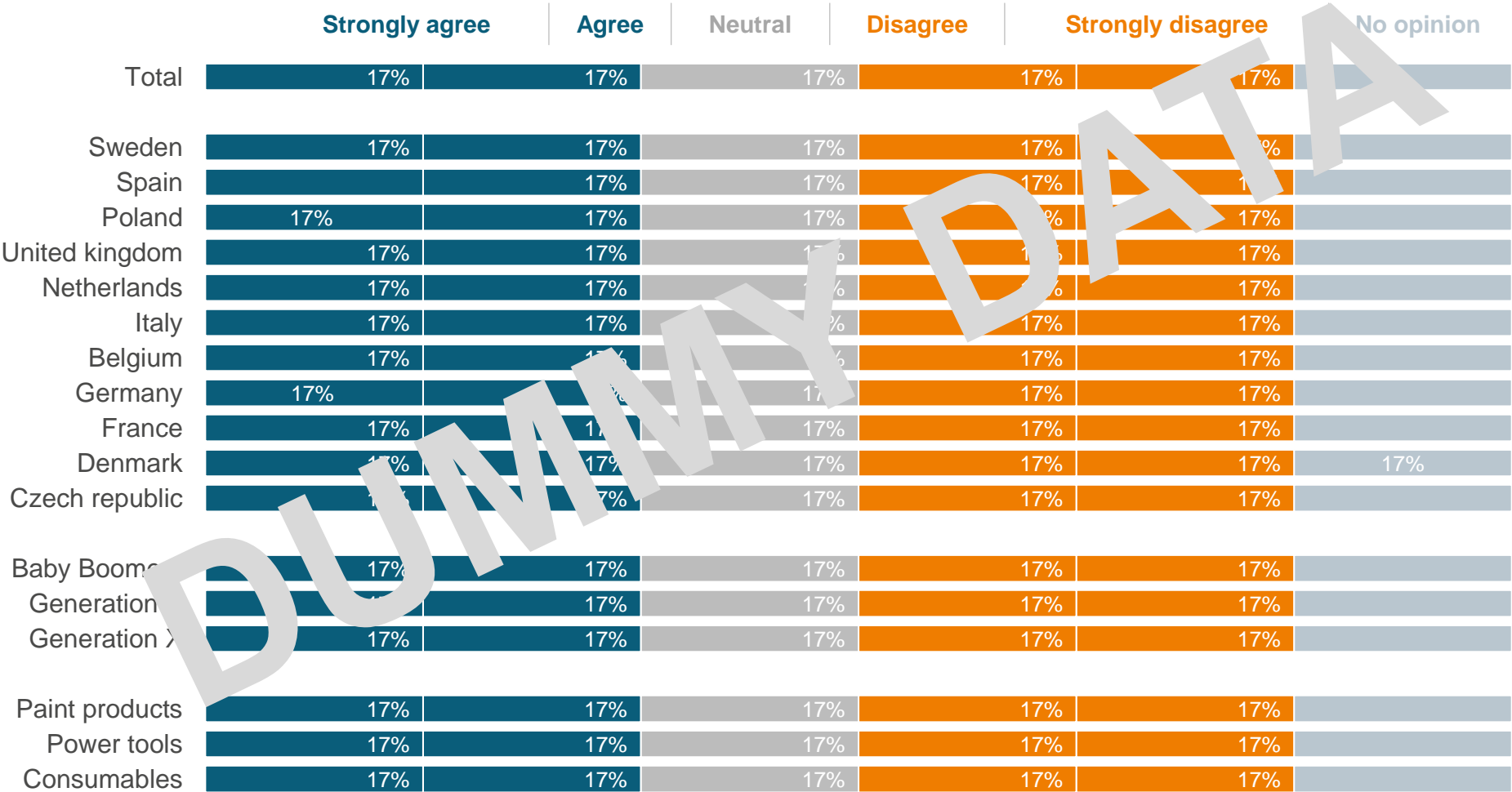
Statement: I always buy the best quality product even if it is more expensive



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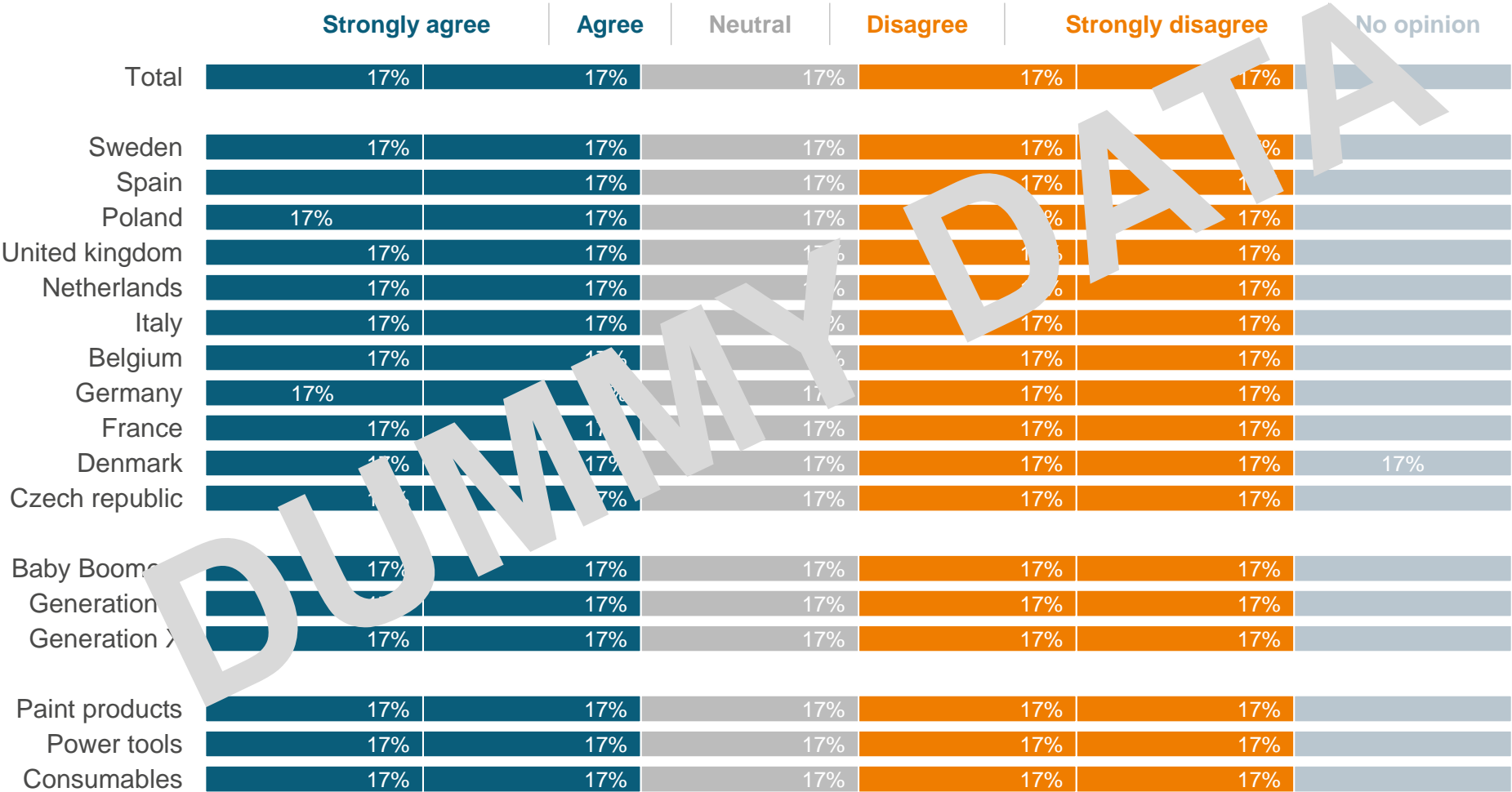
Choosing value for money

Statement: I always buy brands with value for money



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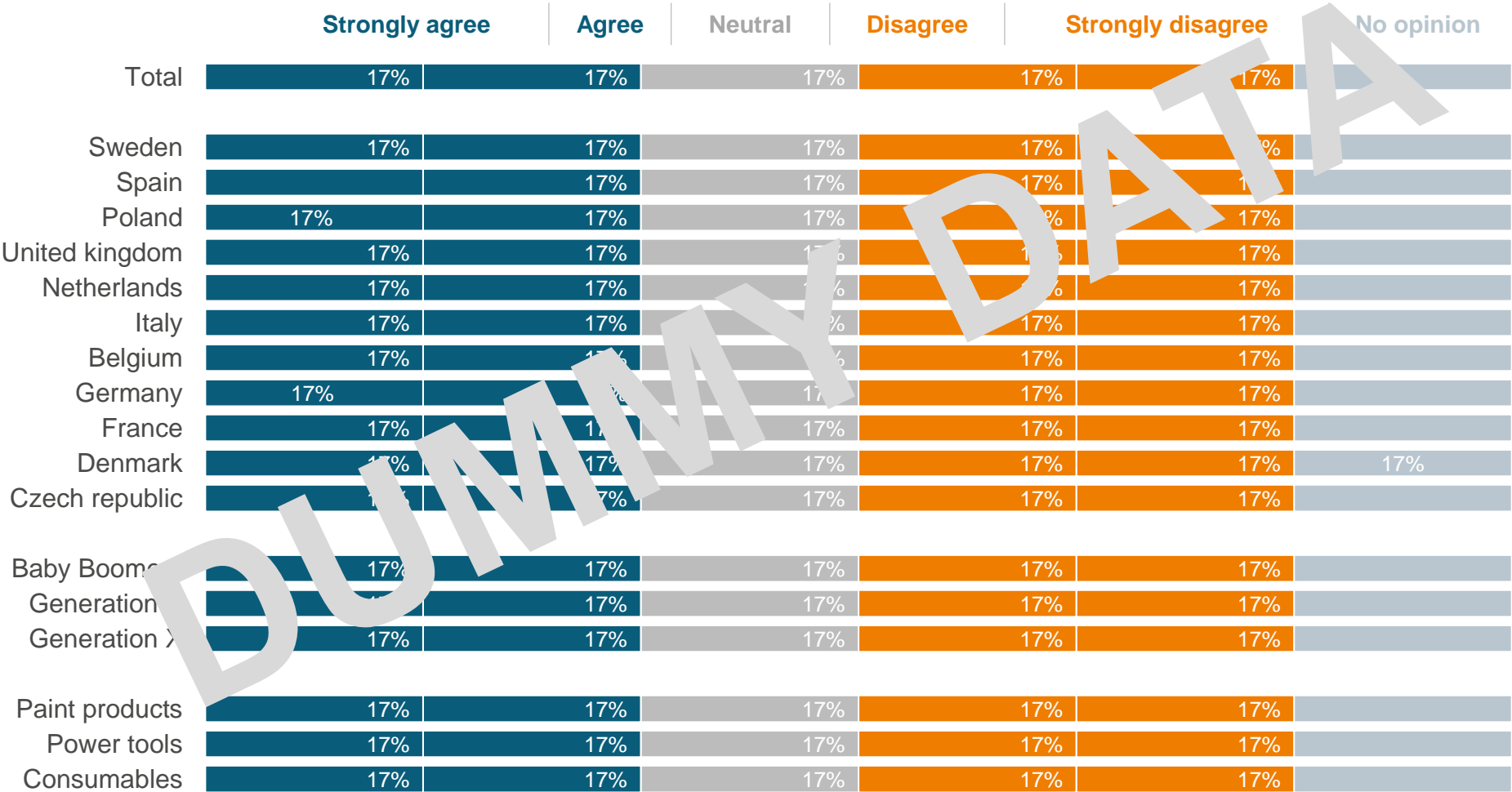
Premium brand purchase
Statement: I always buy premium brands



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Online buying

Statement: I buy more and more through online channels











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Main decision criteria

	 paint products	 consumables	 power tools
Quality	#1 (80%)	#1 (80%)	#1 (80%)
Price	#2 (50%)	#2 (50%)	#2 (50%)
Durability	#3 (30%)		#3 (30%)
Availability		#4 (50%)	




Main purchase channel

	 paint products	 consumables	 power tools
 Specialised wholesaler	40%	40%	40%
 Manufacturer	40%	40%	40%
 General wholesaler	50%	50%	50%
 Retail store	50%	50%	50%
 Pure online	60%	60%	60%

Top 3 ways of ordering

	 paint products	 consumables	 power tools
 In person	50%	50%	50%
 Phone	40%	40%	40%
 Webshop	30%	30%	30%
Buy in bulk	60%	60%	60%
Share online	20%	20%	20%

Delivery

	 paint products	 consumables	 power tools
% Delivery	40%	40%	40%
Delivery location			
Company	60%	60%	60%
Work-site	60%	60%	60%
Home	60%	60%	60%

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Paint products

Consumables

Power tools

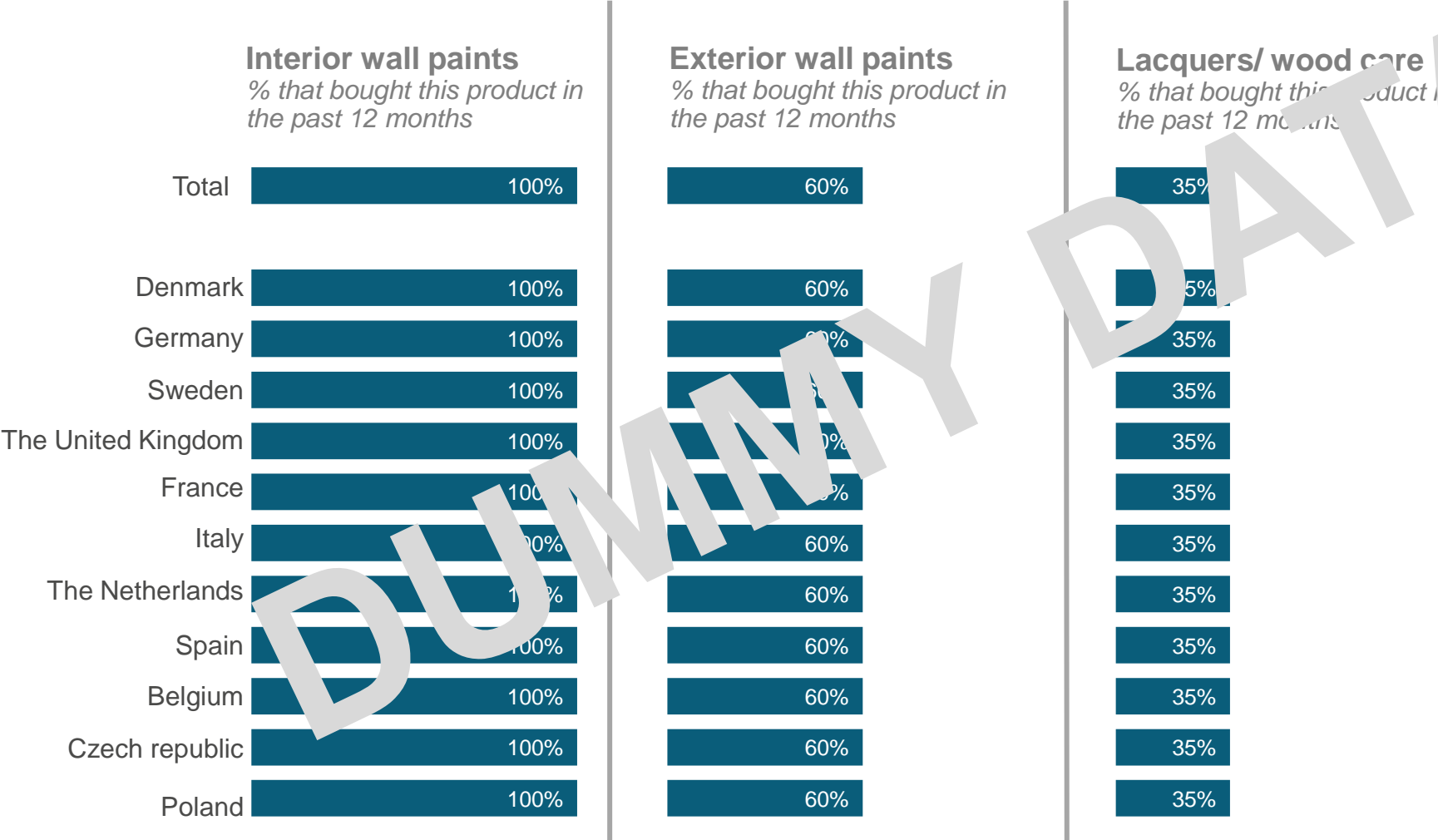
Appendix



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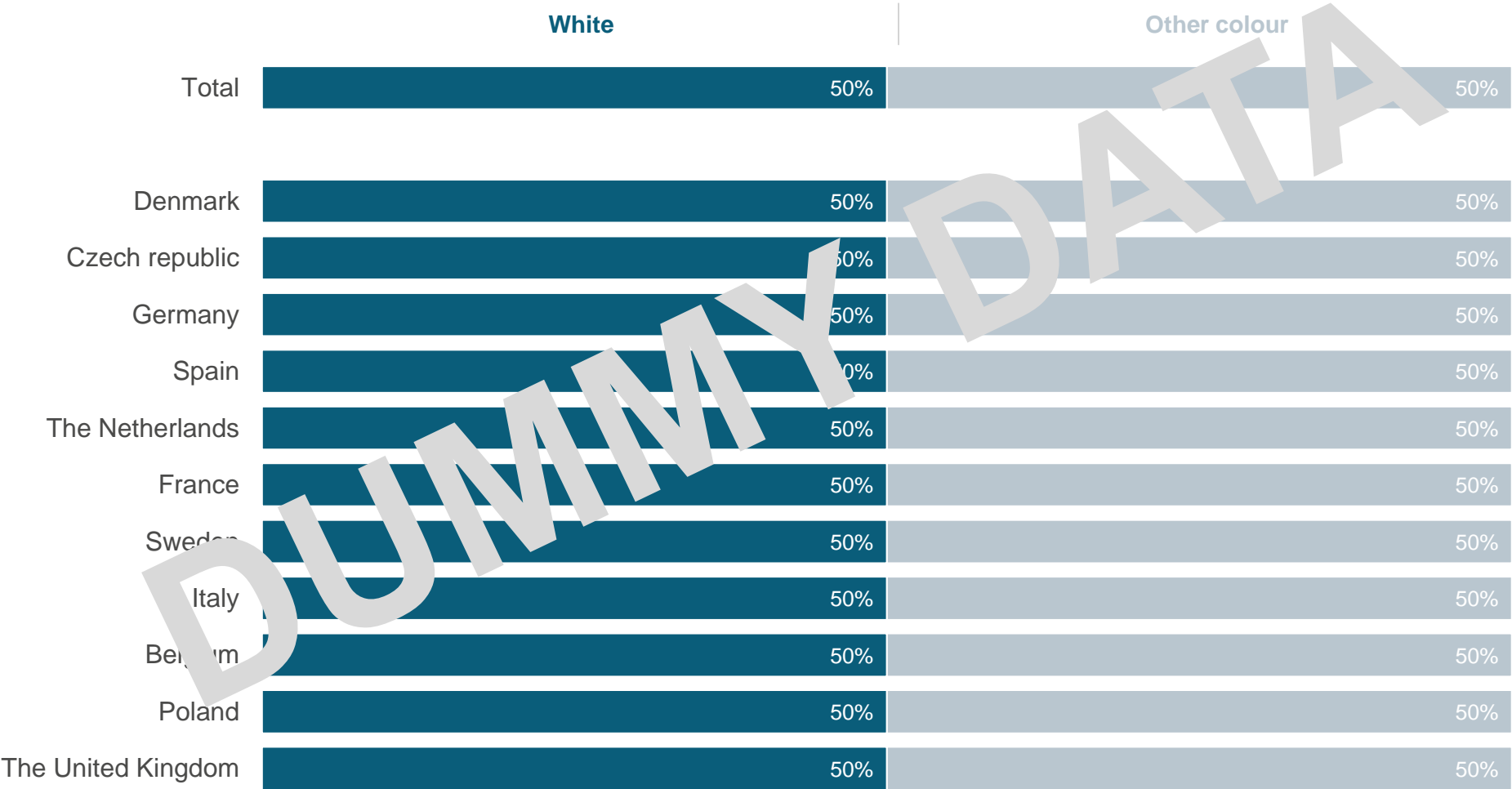
Question: Can you indicate whether you have purchased any of the following paint products in the past 12 months?



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Paint colours

Question: What share of the interior wall paints you bought were in the white colour family compared to other colour families bought?



Other colour families [Top 8]

Question: What colour families other than white have you bought in the last 12 months?

	Total	The United Kingdom	The Netherlands	Belgium	Germany	Poland	France	Spain	Italy	Denmark	Sweden	Czech Republic
Grey	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Green	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Beige	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Blue	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Yellow	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Brown	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Red	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Black	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

...

Main decision criteria for paint products [Top 10]

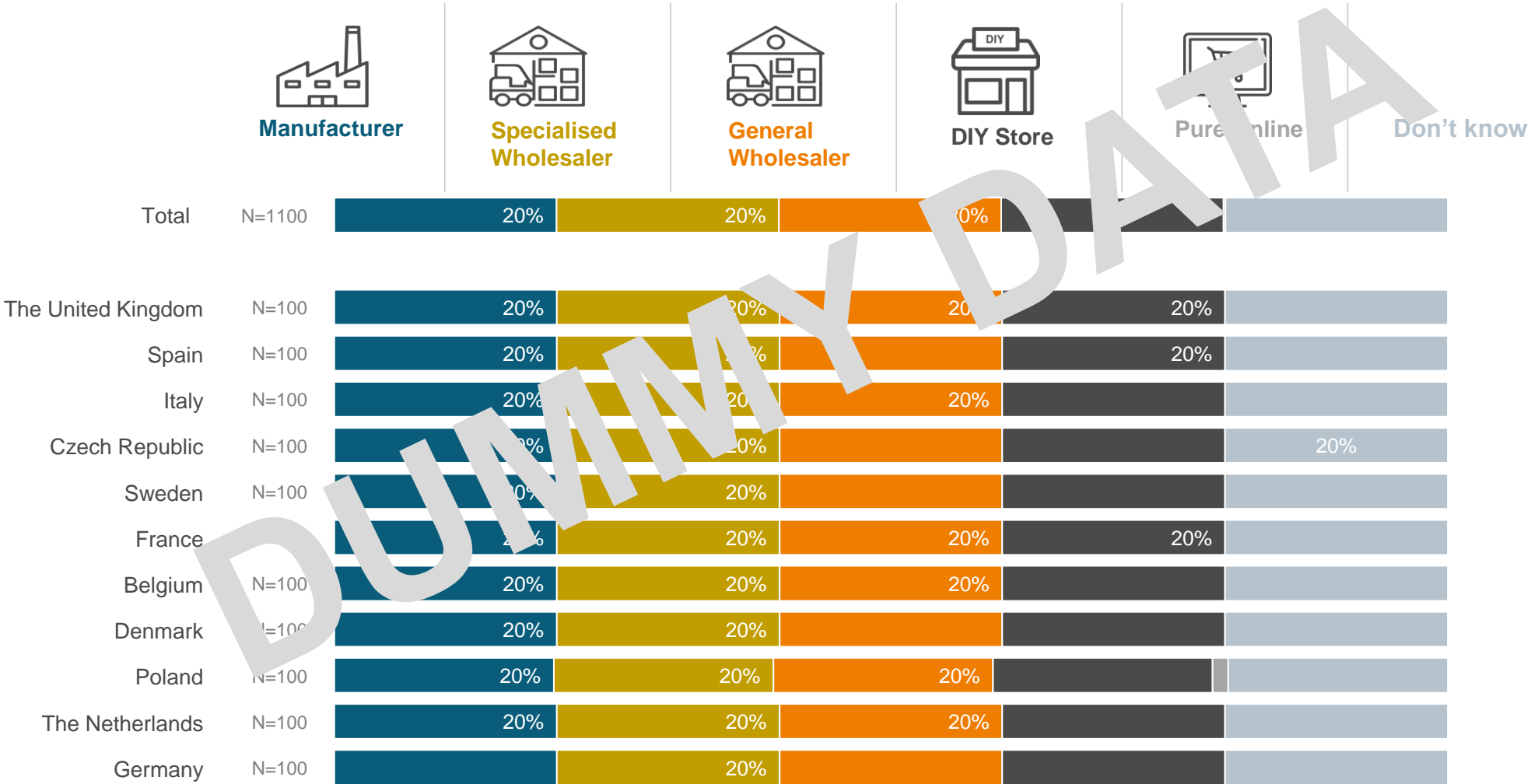
Question: What are the main decision criteria when buying paint products?

	Total	The United Kingdom	The Netherlands	Belgium	Germany	Poland	France	Spain	Italy	Denmark	Sweden	Czech Republic
	N=1100	N=100	N=100	N=100	N=100	N=100	N=100	N=100	N=100	N=100	N=100	N=100
Product quality	25%	25%	25%	25%	25%	25%	25%	25%	91%	25%	25%	25%
Price level	25%	25%	25%	25%	25%	25%	25%	25%	30%	25%	25%	25%
Durability	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Product availability	25%	25%	25%	25%	25%	25%	25%	25%	8%	25%	25%	25%
Product coverage	25%	25%	25%	25%	25%	25%	25%	25%	34%	25%	25%	25%
Ease of use	25%	25%	25%	25%	25%	25%	25%	25%	11%	25%	25%	25%
Drying time	25%	25%	25%	25%	25%	25%	25%	25%	6%	25%	25%	25%
Promotions/ discounts	25%	25%	25%	25%	25%	25%	25%	25%	0%	25%	25%	25%
Ease of cleaning	25%	25%	25%	25%	25%	25%	25%	25%	2%	25%	25%	25%
Hazardous substances levels	25%	25%	25%	25%	25%	25%	25%	25%	6%	25%	25%	25%

...

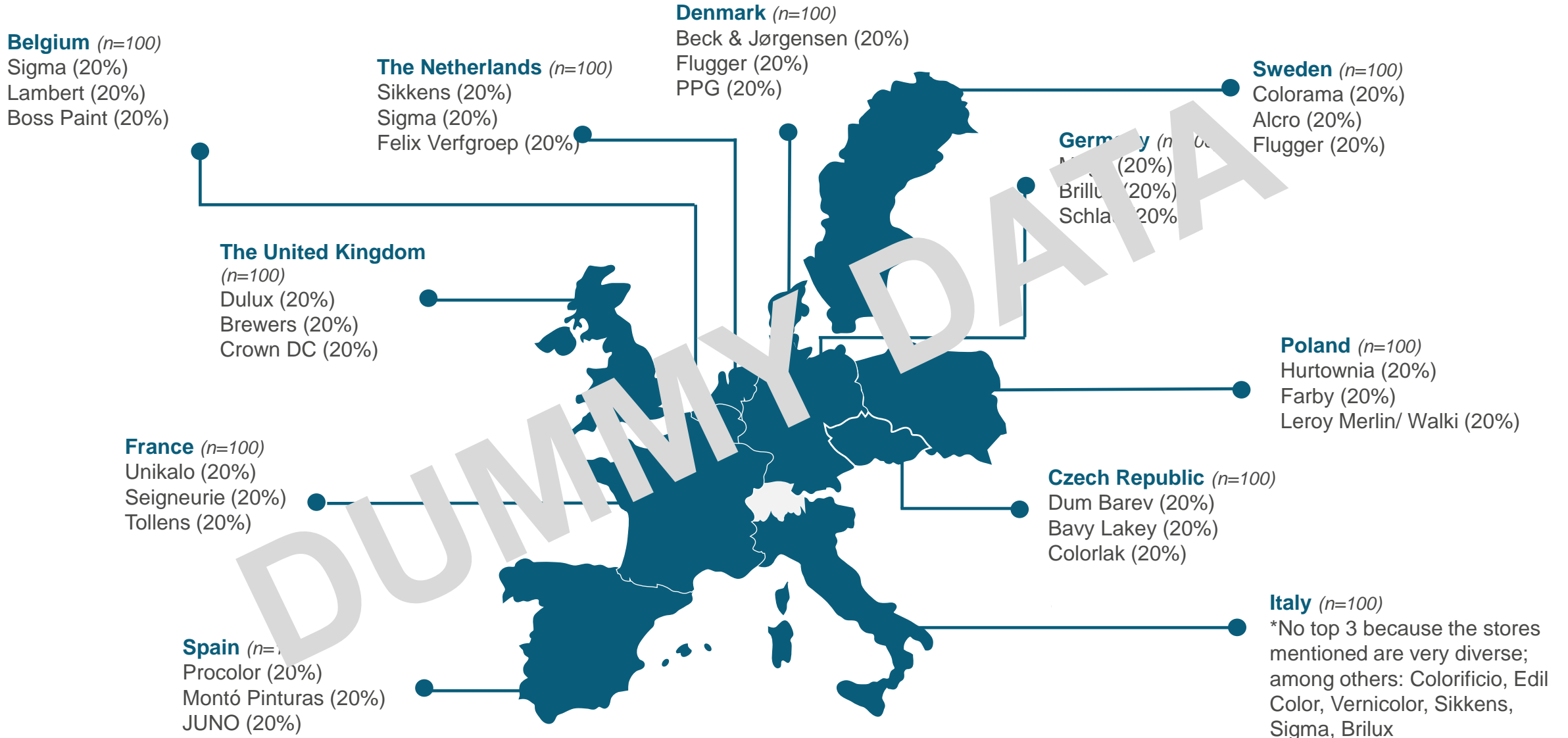
Purchase channel paint products

Question: Where do you mainly buy your paint products?





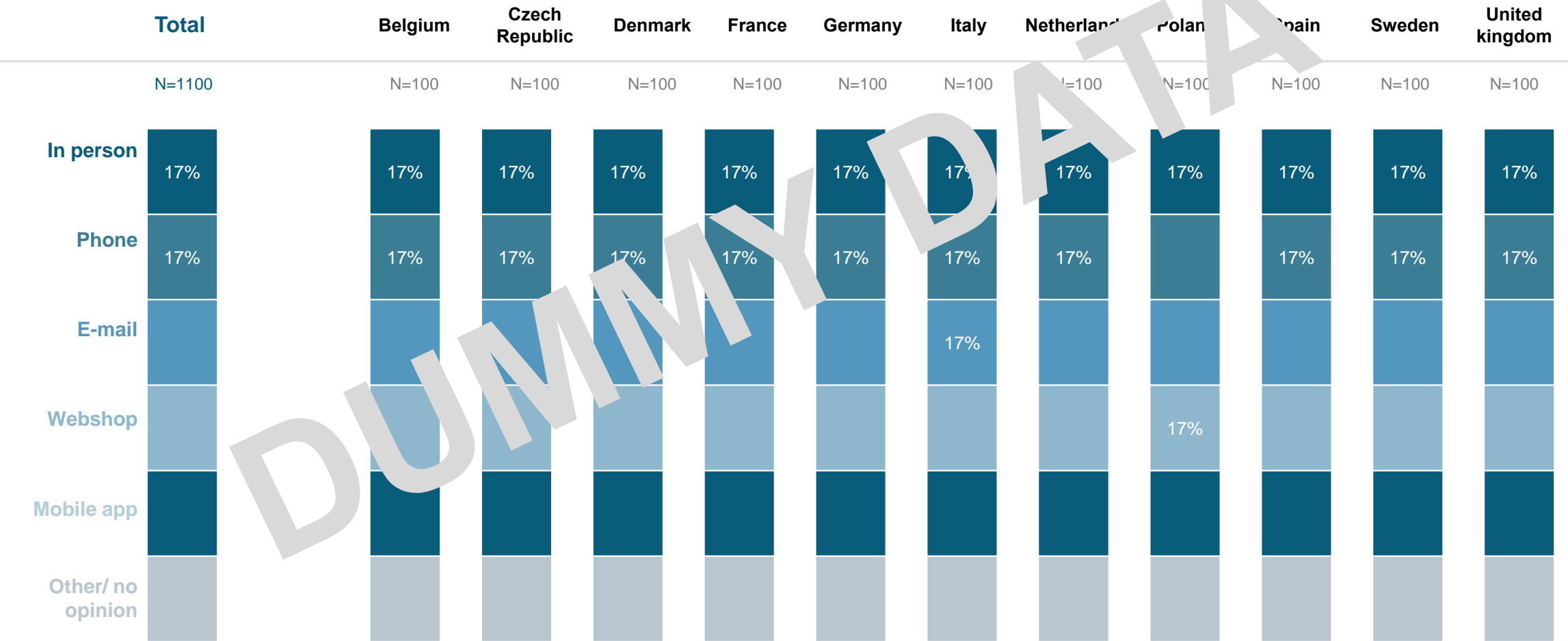
...





Way of ordering paint products [Top 10]

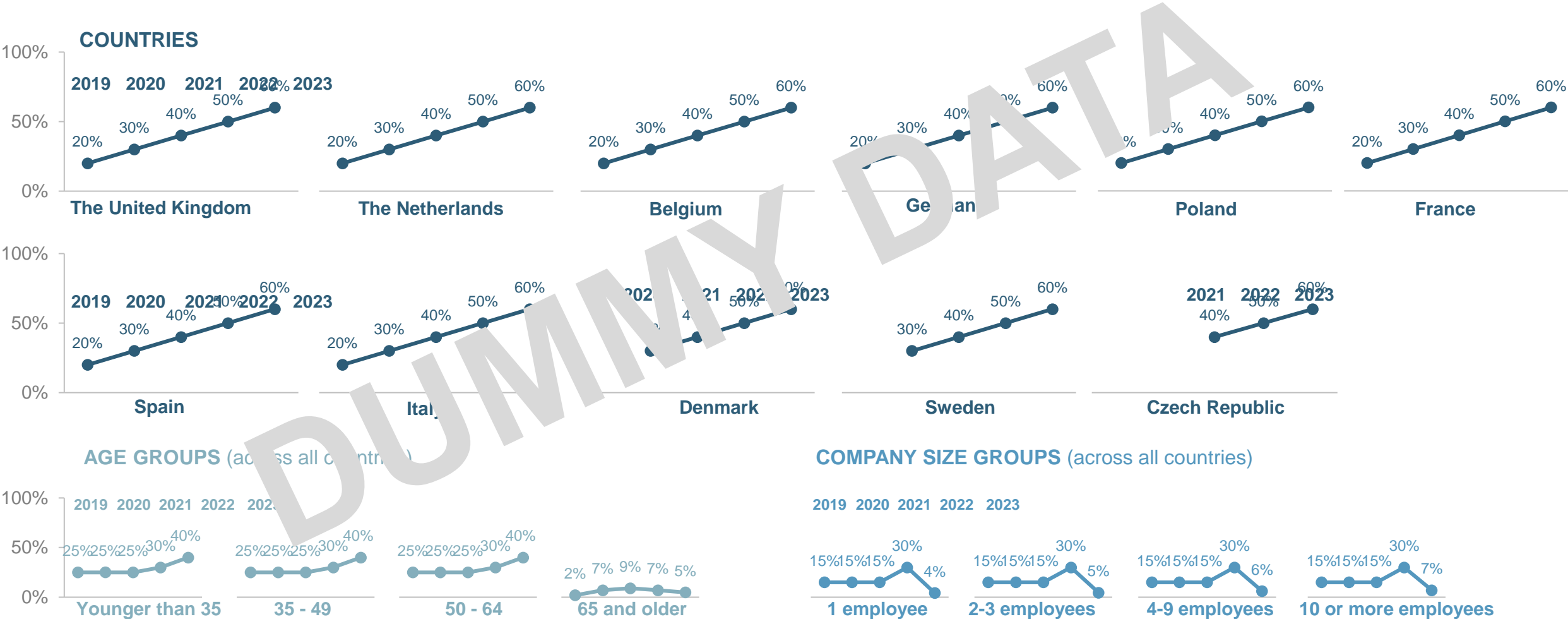
Question: What is your most used way of ordering paint products ?



...

Share of online buying – Paints and lacquers

Question: Can you estimate, over the past 12 months, what percentage of your purchases did you purchase online?



...

Purchase behaviour - paint products

Question: Do you mostly order the paint products that you purchased in bulk for storage, or do you just buy them when you need them?



		Bulk	Amount I need	Don't know
Total	N=1100	33%	33%	
Germany	N=100	33%	33%	
Denmark	N=100	33%	33%	
Italy	N=100	33%	33%	
Spain	N=100	33%	33%	
Belgium	N=100	33%	33%	
The Netherlands	N=100	33%	33%	
Czech Republic	N=100	33%	33%	
Poland	N=100	33%	33%	
France	N=100	33%	33%	
The United Kingdom	N=100	33%	33%	
Sweden	N=100	33%	33%	

Question: And do you mostly pick up the paint products that you purchased or get them delivered?

		Pick up	Delivered	Don't know
Total	N=1100	33%	33%	
Czech Republic	N=100	33%	33%	
Poland	N=100	33%	33%	
Sweden	N=100	33%	33%	
France	N=100	33%	33%	
The United Kingdom	N=100	33%	33%	
Italy	N=100	33%	33%	
Belgium	N=100	33%	33%	
The Netherlands	N=100	33%	33%	
Spain	N=100	33%	33%	
Denmark	N=100	33%	33%	
Germany	N=100	33%	33%	

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Paint products

Consumables

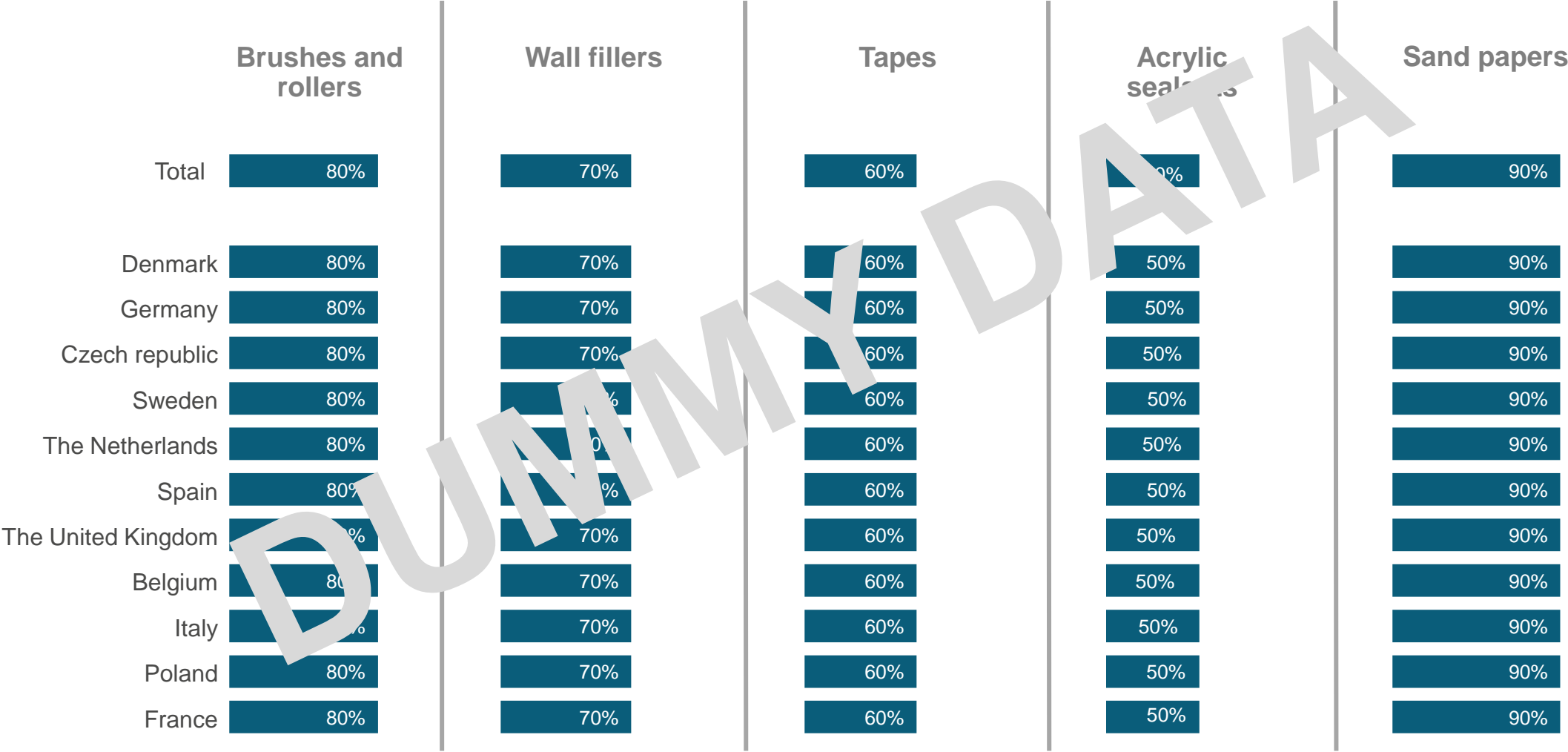
Power tools

Appendix



...

Question: Can you indicate whether you have purchased any of the following products in the past 12 months?



...

Main decision criteria for **consumables** [Top 10]



Question: What are the main decision criteria when buying consumables?

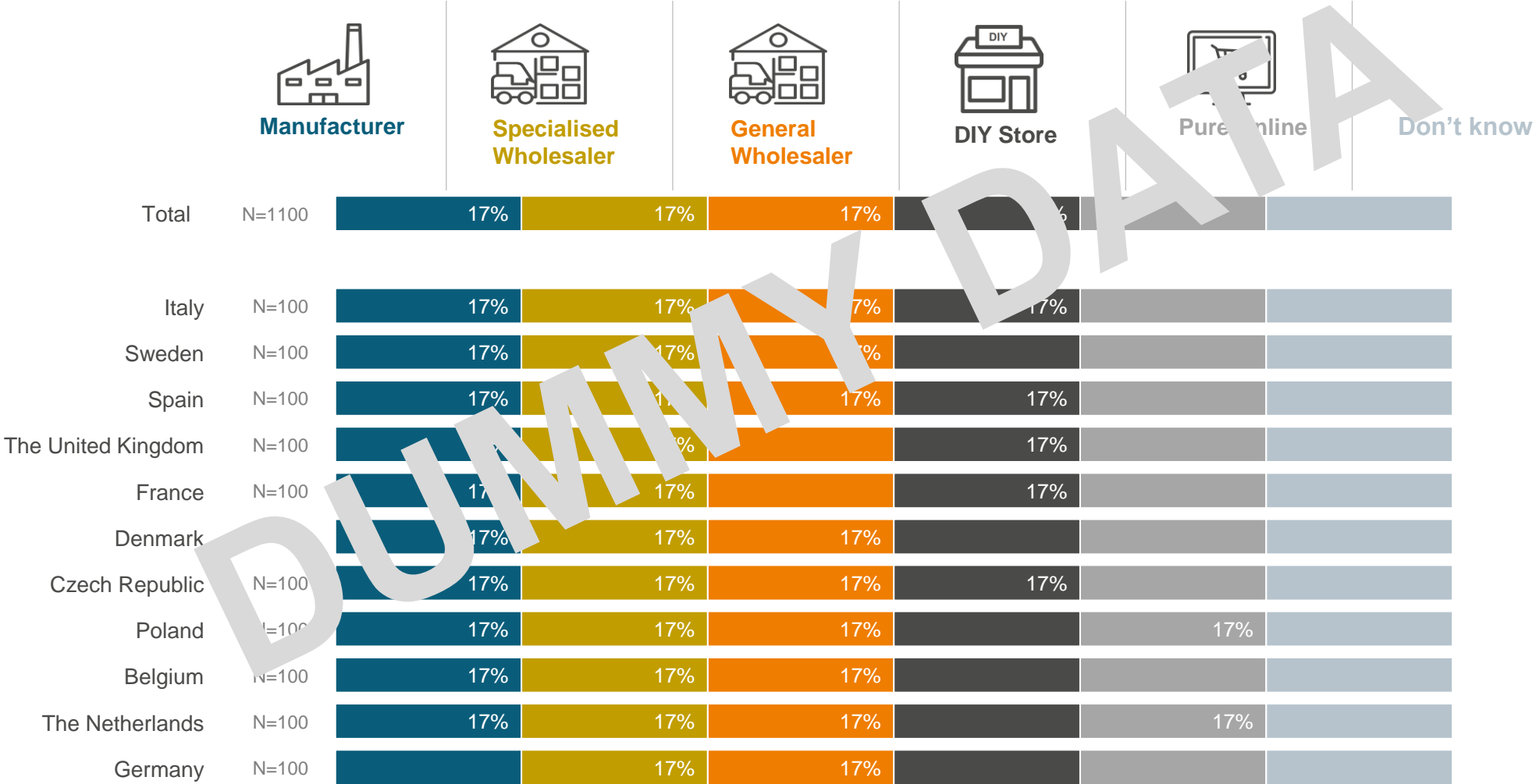
	Total	The United Kingdom	The Netherlands	Belgium	Germany	Poland	France	Spain	Italy	Denmark	Sweden	Czech Republic
	N=1100	N=100	N=100	N=100	N=100	N=100	N=100	N=100	N=100	N=100	N=100	N=100
Product quality	90%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Price level	80%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Product availability	70%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Durability	60%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Ease of use	50%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Promotions/ discounts	40%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Product coverage	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Drying time	20%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Safety	10%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Ease of cleaning	5%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

...

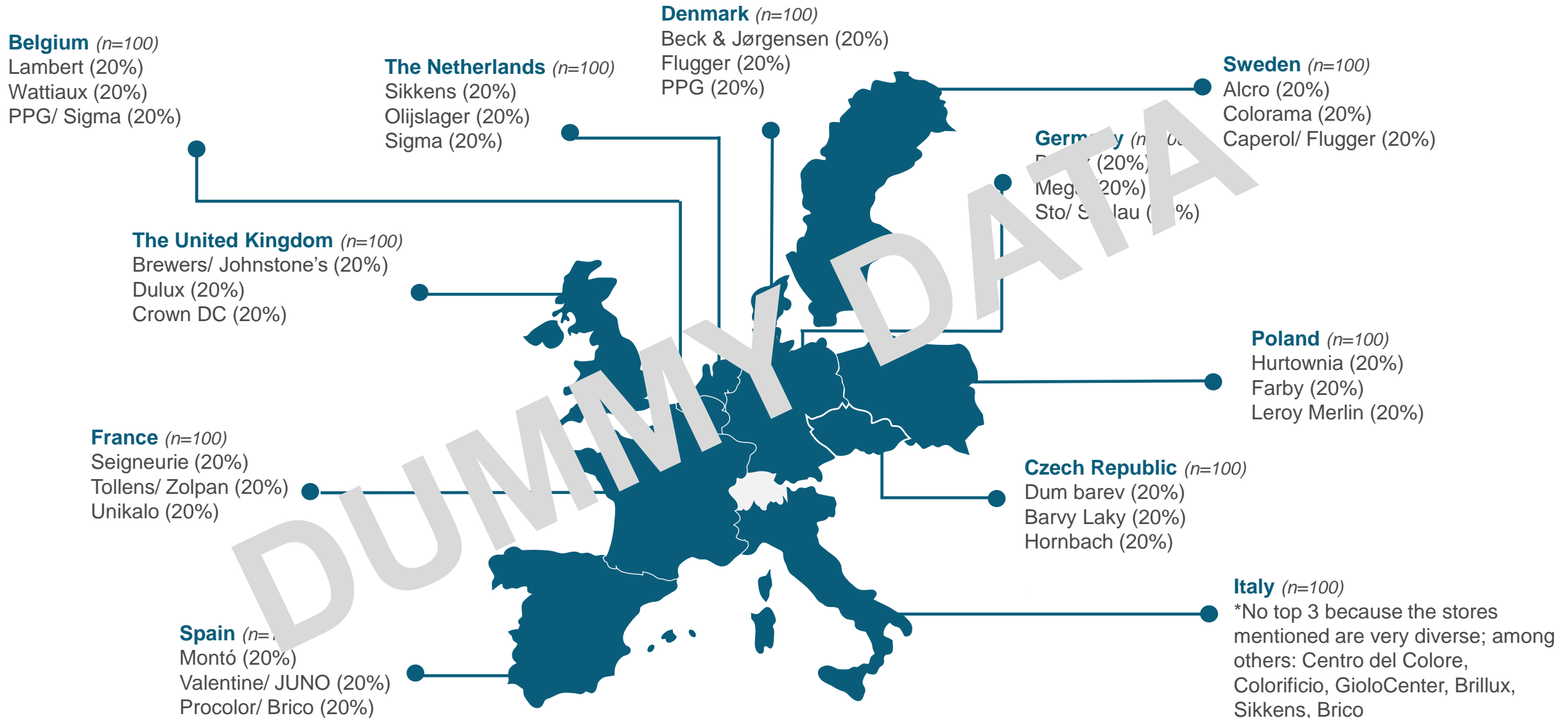
Purchase channel consumables



Question: Where do you mainly buy your consumables?



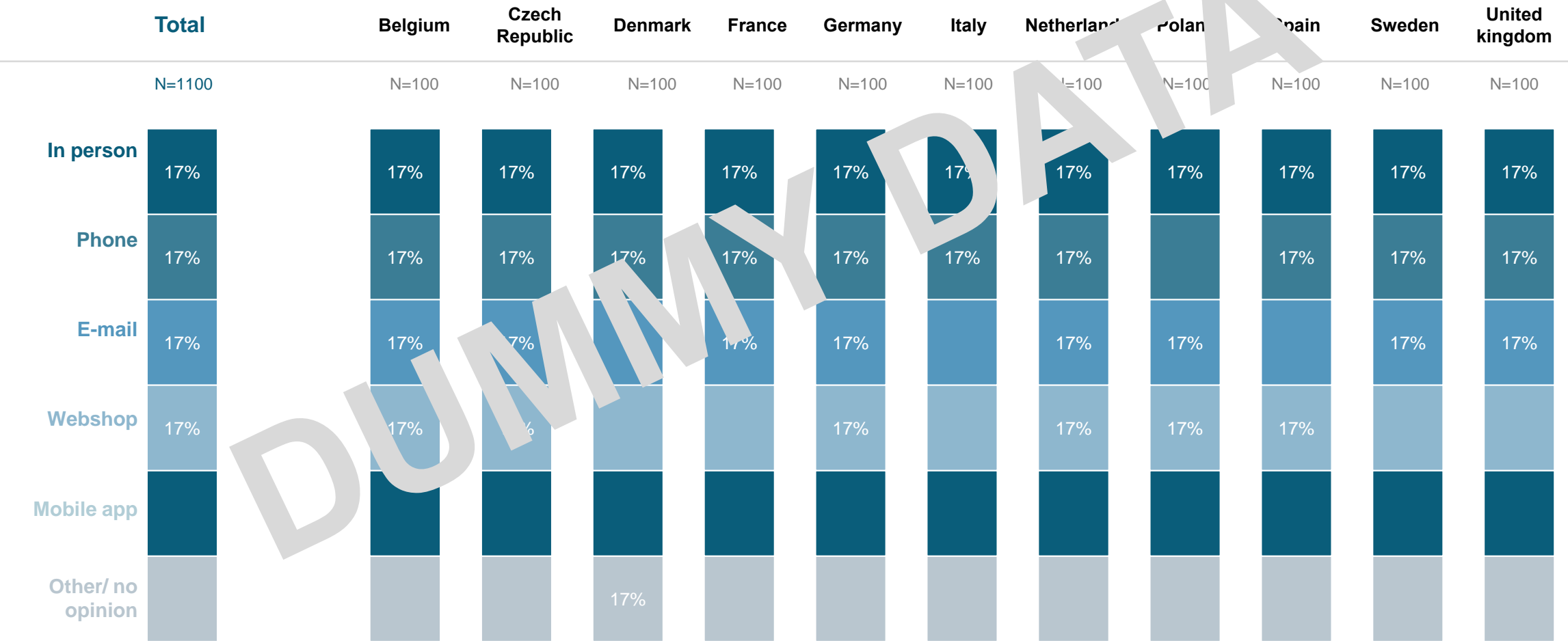
...





Way of ordering consumables [Top 10]

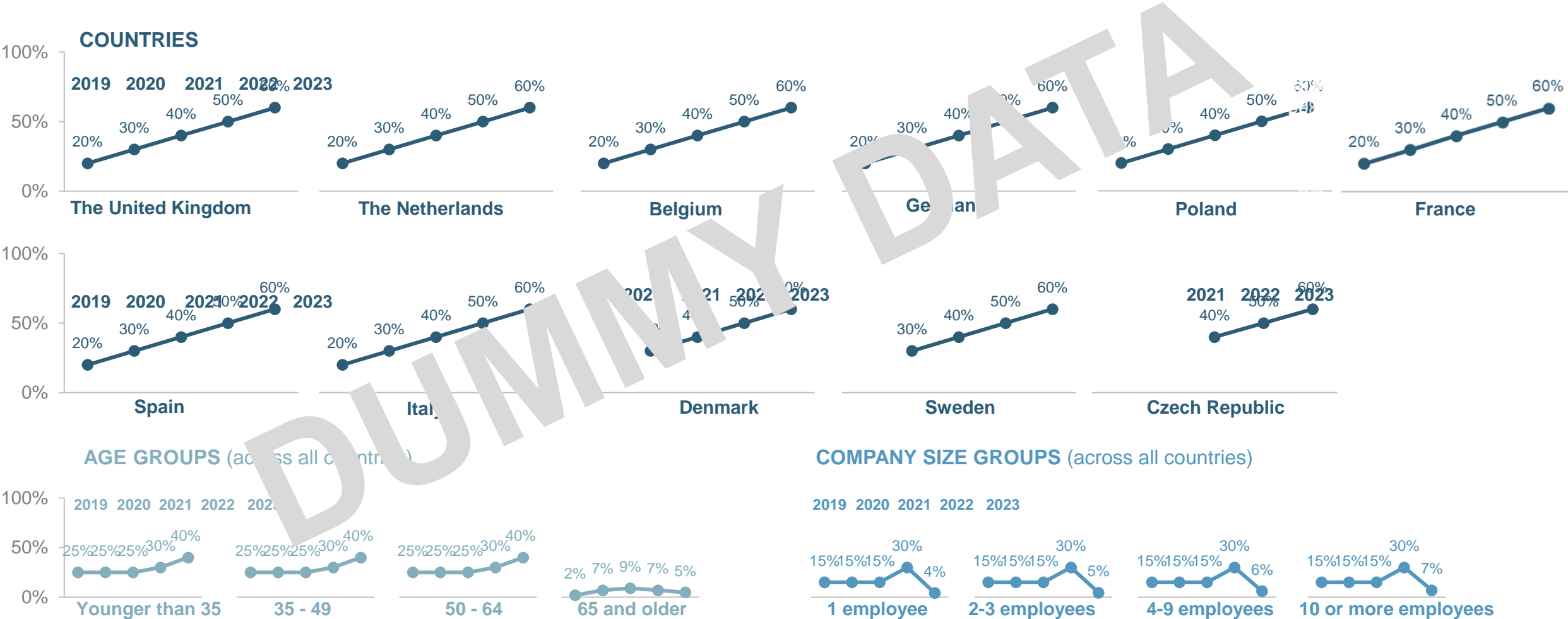
Question: What is your most used way of ordering consumables?



...

Share of online buying – **Consumables** like tapes, acrylic sealants, brushes, rollers

Question: Can you estimate, over the past 12 months, what percentage of your purchases did you purchase online?



...

Purchase behaviour consumables

Question: Do you mostly order the consumables that you purchased in bulk for storage or do you just buy them when you need?



Question: And do you mostly pick up the consumables that you purchased or get them delivered?

		Bulk	Amount I need	Don't know
Total	N=1100	33%	33%	
Germany	N=100	33%	33%	
Denmark	N=100	33%	33%	
Italy	N=100	33%	33%	
Spain	N=100	33%	33%	
Belgium	N=100	33%	33%	
The Netherlands	N=100	33%	33%	
Czech Republic	N=100	33%	33%	
Poland	N=100	33%	33%	
France	N=100	33%	33%	
The United Kingdom	N=100	33%	33%	
Sweden	N=100	33%	33%	

		Pick up	Delivered	Don't know
Total	N=1100	33%	33%	
Germany	N=100	33%	33%	
Denmark	N=100	33%	33%	
Italy	N=100	33%	33%	
Spain	N=100	33%	33%	
Belgium	N=100	33%	33%	
The Netherlands	N=100	33%	33%	
Czech Republic	N=100	33%	33%	
Poland	N=100	33%	33%	
France	N=100	33%	33%	
The United Kingdom	N=100	33%	33%	
Sweden	N=100	33%	33%	

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Consumables

Power tools

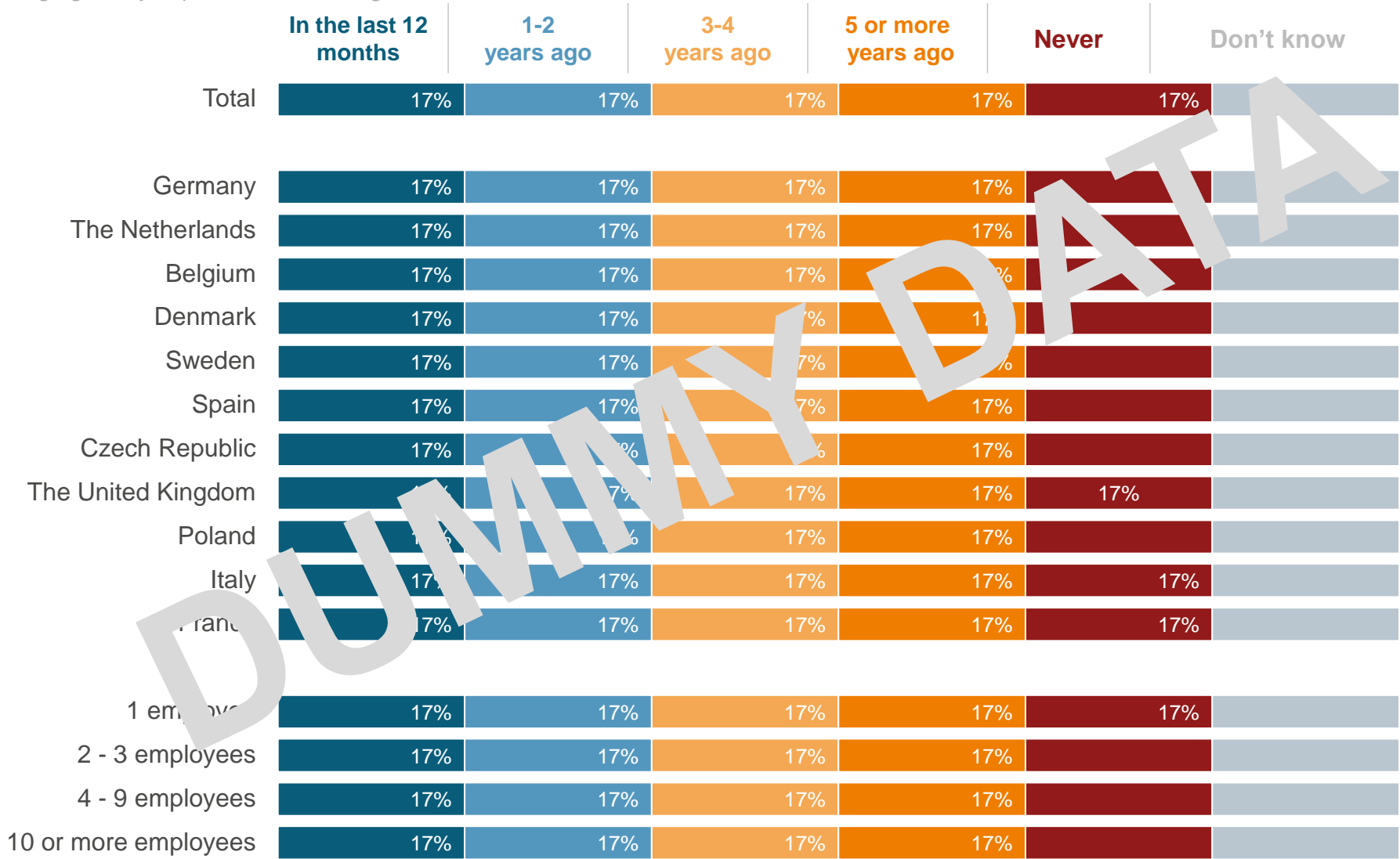
Appendix



...

Sanding machine

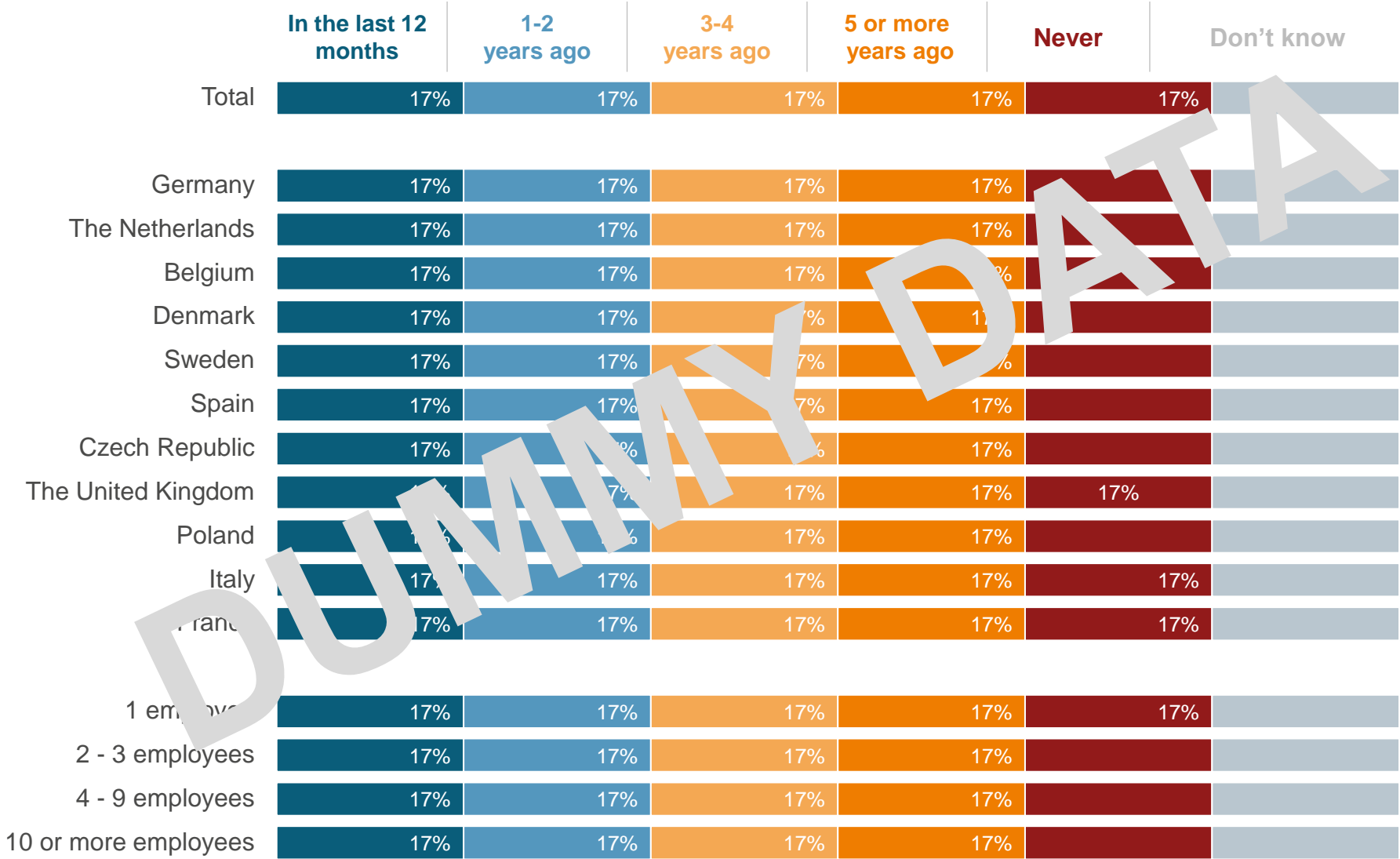
Question: How long ago did you purchase a sanding machine?



...

Paint sprayers

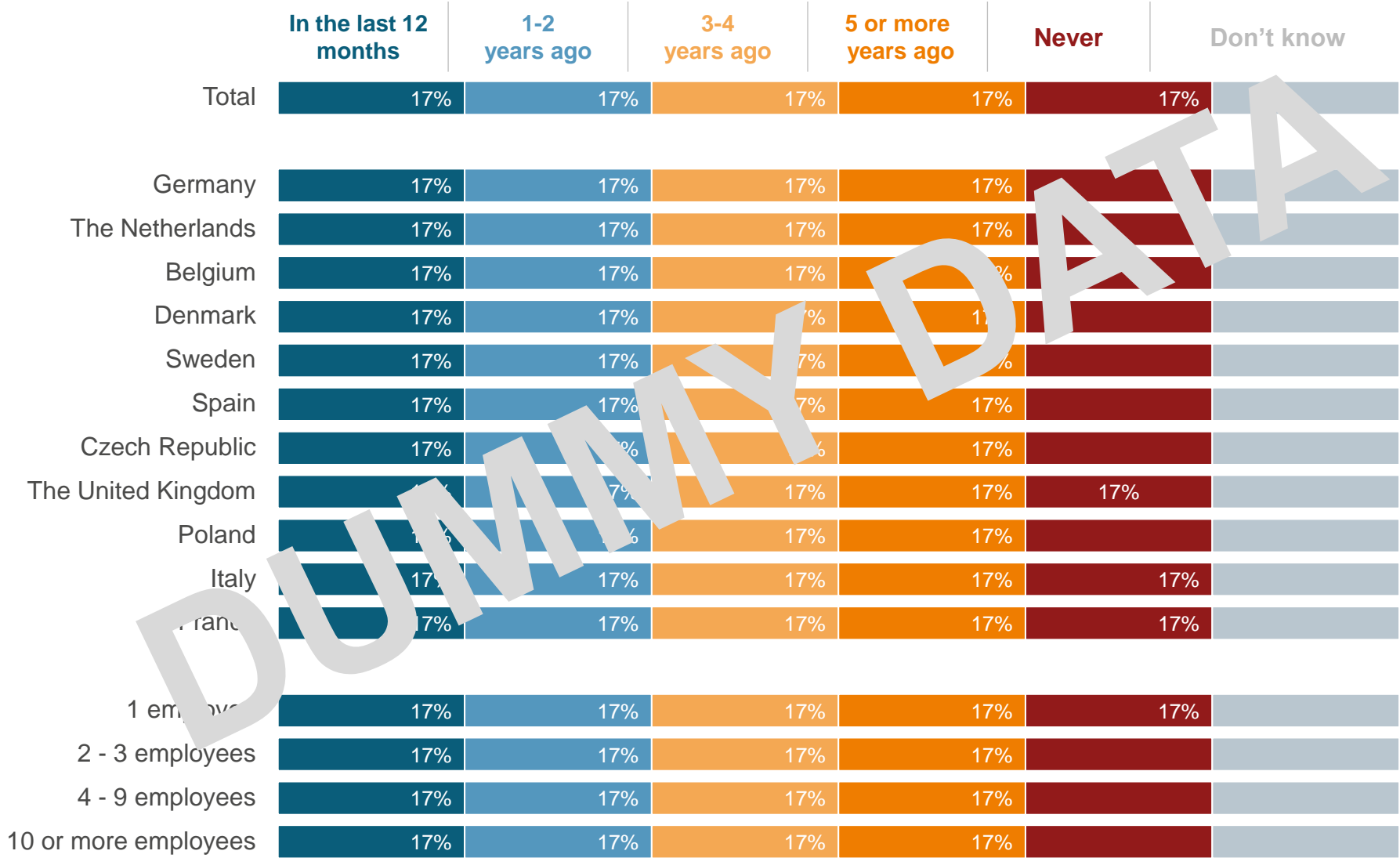
Question: How long ago did you purchase a paint sprayer?



...

Dust extractor

Question: How long ago did you purchase a dust extractor?



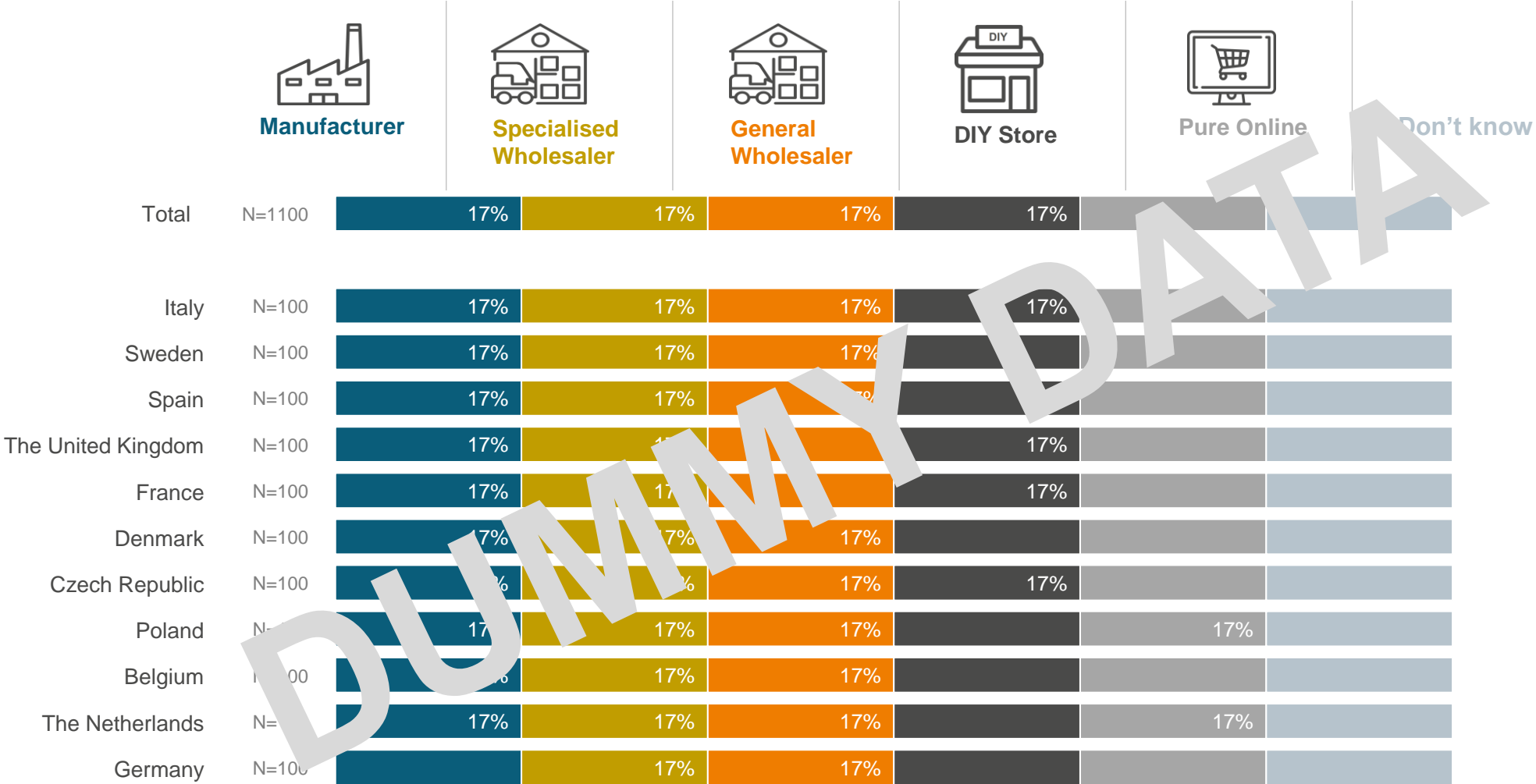
[illegible]

...

Purchase channel power tools



Question: Where do you mainly buy your power tools?



...

**Belgium** (n=100)

Lambert (20%)
Boss paint (20%)
Festool/ Thiry Paints/
Toolstation/ Miniox (20%)

The Netherlands (n=100)

Sikkens (20%)
Simones (20%)
Sigma (20%)

Denmark (n=100)

Beck & Jørgensen (20%)
PPG (20%)
Nordsjo (20%)

Sweden (n=100)

Anti-Corrosion (20%)
Alcro/ Beijer (20%)
Colorama, Nordsjo, Flugger,
Lauhaus, Jula, Ljungdahls Färg,
Proffsmagasinet (20%)

Germany (n=100)

Brillux (20%)
Mikita (20%)
Local supplier (20%)

The United Kingdom (n=100)

Screwfix (20%)
Toolstation (20%)
Brewers, Dulux, B&Q (20%)

Poland (n=100)

Farby (20%)
Hurtownia (20%)
Leroy Merlin/ Szlifierki (20%)

France (n=100)

Seigneurie, Tollens, Unikalo (20%)
Leroy Merlin (20%)
La Plateforme du Travaux, Peinture de Paris,
Sikkens, Zolpa, Brico (20%)

Czech Republic (n=100)

Hornbach/ OBI (20%)
Bosch (20%)
Mikita (20%)

Spain (n=100)

Brico (20%)
Montó (20%)
Leroy Merlin/ JUNO (20%)

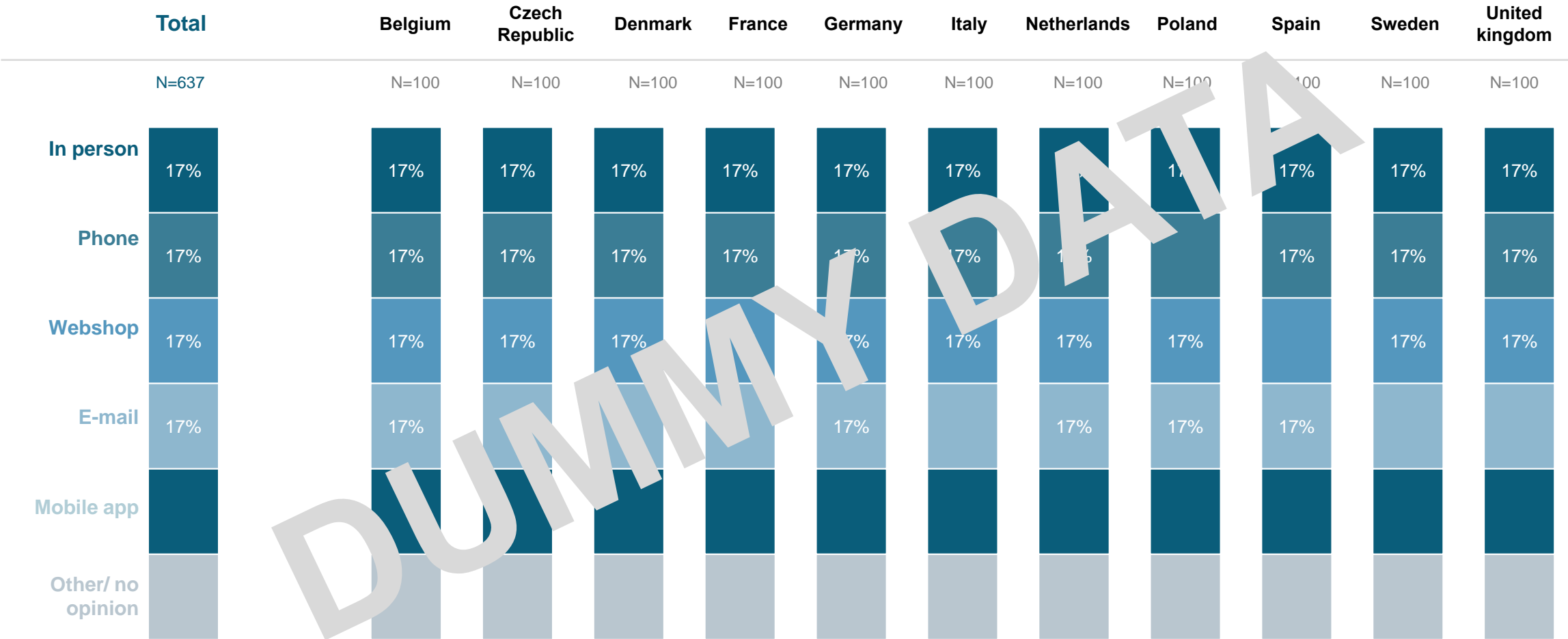
Italy (n=100)

*No top 3 because the stores mentioned are very diverse;
among others: Colorificio,
Bricoman, Amazon, Leroy Merlin,
Brico, Würth, OBI, Sikkens,
Sigma, Caparol

...

Way of ordering power tools [Top 10]

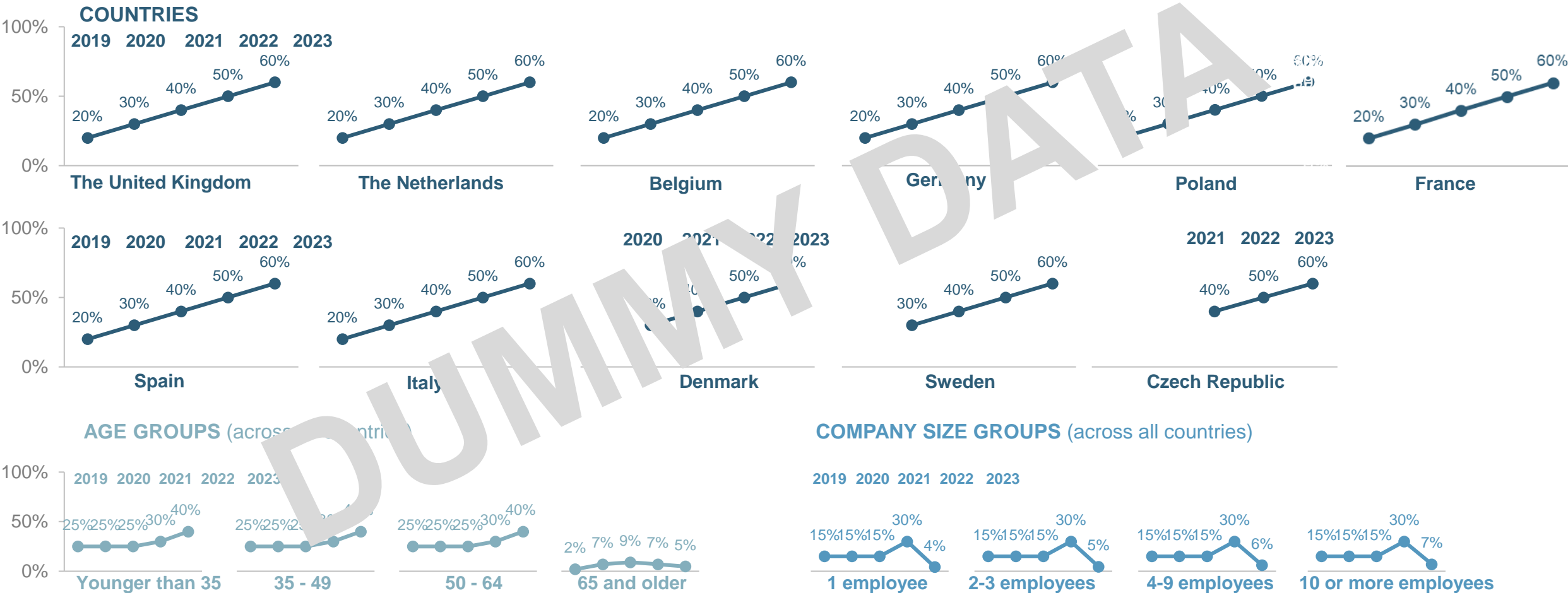
Question: What is your most used way of ordering power tools ?



...

Share of online buying – **Power tools** like sanding machines and paint sprayers

Question: Can you estimate, over the past 12 months, what percentage of your purchases did you purchase online?



...

Purchase behaviour power tools

Question: Do you mostly order the power tools that you purchased in bulk for storage or do you just buy them when you need?



Question: And do you mostly pick up the power tools that you purchased or get them delivered?

		Bulk	Amount I need	Don't know
Total	N=1100	33%	33%	
Germany	N=100	33%	33%	
Denmark	N=100	33%	33%	
Italy	N=100	33%	33%	
Spain	N=100	33%	33%	
Belgium	N=100	33%	33%	
The Netherlands	N=100	33%	33%	
Czech Republic	N=100	33%	33%	
Poland	N=100	33%	33%	
France	N=100	33%	33%	
The United Kingdom	N=100	33%	33%	
Sweden	N=100	33%	33%	

		Pick up	Delivered	Don't know
Total	N=1100	33%	33%	
Germany	N=100	33%	33%	
Denmark	N=100	33%	33%	
Italy	N=100	33%	33%	
Spain	N=100	33%	33%	
Belgium	N=100	33%	33%	
The Netherlands	N=100	33%	33%	
Czech Republic	N=100	33%	33%	
Poland	N=100	33%	33%	
France	N=100	33%	33%	
The United Kingdom	N=100	33%	33%	
Sweden	N=100	33%	33%	

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...

Delivery

Question: Where do you mostly get <Product> delivered?

		Home	Work-site	Company location	Other	Don't know
Total	N=1100	20%	20%	20%	20%	
United kingdom	N=100	20%	20%	20%	20%	
Belgium	N=100	20%	20%	20%		
Netherlands	N=100	20%	20%	20%		
Czech republic	N=100	20%	20%	20%	20%	
France	N=100	20%	20%	20%		
Italy	N=100	20%	20%	20%	20%	
Spain	N=100	20%	20%	20%	20%	
Poland	N=100	20%	20%	20%		
Sweden	N=100	20%	20%	20%	20%	
Germany	N=100	20%	20%	20%		
Denmark	N=100	20%	20%	20%		
Power tools	N=100	20%	20%	20%	20%	
Consumables	N=100	20%	20%	20%	20%	
Paint products	N=100	20%	20%	20%		

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