



# Painter Insight Monitor 2024

Theme topic: Sustainability

July 2024

A product by **USP** Marketing Consultancy

# Painter Insight Monitor 2024

## 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 **1,898** phone interviews, divided over 12 major European markets.

## THE RESEARCH TOPICS 2024

- 1. Profile** of the professional painter and **trend tracking** (recurring yearly)
- 2. Role of Sustainability** in painters' projects and **product choice**
- 3. Brand** performance scans (recurring yearly; provided as a separate report file)

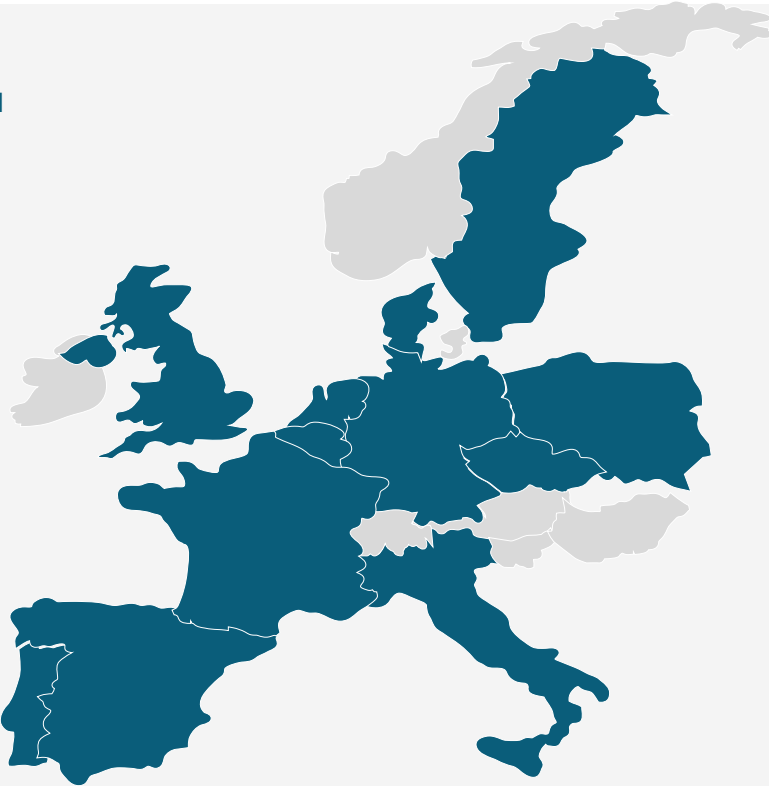
## TIMELINE



## COUNTRY SCOPE

with number of interviews conducted

Belgium	150
France	200
Germany	195
Italy	150
Poland	200
Spain	149
The Netherlands	150
United Kingdom	151
Denmark	151
Sweden	151
Czech Republic	126
Portugal	125



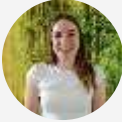
## PROJECT TEAM



**Zeynep Kutsal**  
Consultant  
kutsal@usp-mc.nl



**Natalija Plese**  
Project Manager  
plese@usp-mc.nl



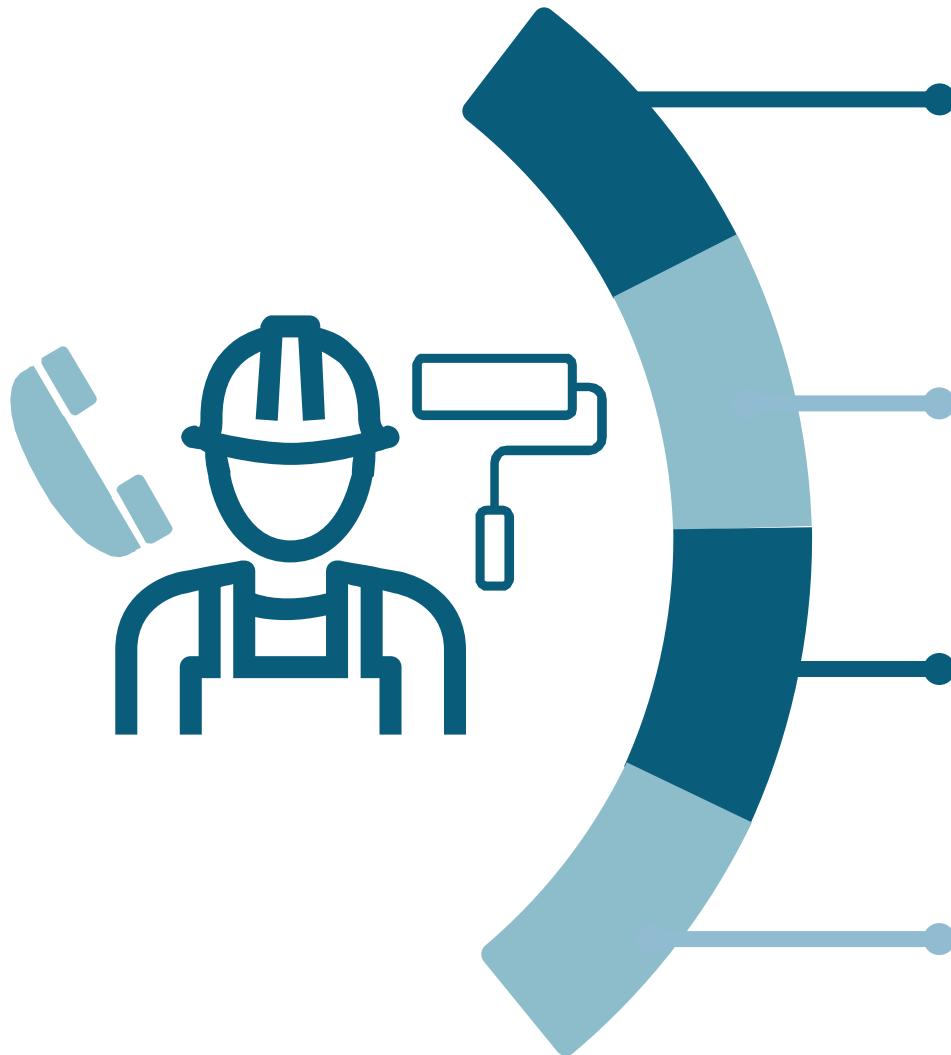
**Magdalena Nekic**  
Research Analyst  
nekic@usp-mc.nl

# Index

Management summary	
Profile of the painter	
Sustainability	
	Paint products
	Consumables
	Power tools
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 77% 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.

# Report reading guide



## The historical trend is shown (if available)...

...and data comparison with previous years has been provided for all available measurements.

## DATA in this report has been prepared...

...by statistical analysis standards, which should be taken into account when reading the report:

- Only (sub)samples of size  $n \geq 50$  represent a methodologically sufficient base for most reliable conclusions.
- Data shown for (sub)samples  $30 < n < 50$  are an indication of market trends, while even lower samples ( $n < 30$ ) represent only a qualitative level of insights.
- Observed changes on country level compared to total European level are marked in green or red font if the country shares are in calculation 20% higher or 20% lower than the European share, while means are marked in green or red font if the means are 0,5 higher or 0,5 lower.
- Year-on-Year (YoY) data change compared to the previous year is marked with green arrows ▲ indicating a positive trend or red arrows ▼ indicating a negative trend.
- Observed YoY changes are marked in green or red font if the trend change is bigger than 20%, higher or lower in 2024, while means are marked in green or red font if the means are 0,5 higher or 0,5 lower.

## Open-ended questions with spontaneous answers are...

...reported by recoding all answers under the list of most often mentions, with data processing:

- All other random answers together under 'Other, namely'. 'Other, namely' and 'Don't know' results are not reported but only mentioned for total European level in the footnote on the respective slide (in addition of information about some country level if the shares of those answers are high there).
- Some most-often-mentioned answers were merged when going from all products categories to paint products/consumables/power tools because of their small shares or smaller sample sizes.

## The appendix provides...

...additional slides with more detailed overviews of results on some of the questions.

# About the theme topic: Sustainability



## Why is the sustainability topic relevant for your business?

Like in many other industries, sustainability has become increasingly important in the European painters' sector due to global concerns about the environment, resource conservation, and social responsibility.

Investigating sustainability is a strategic decision that benefits manufacturers in terms of market competitiveness, regulatory compliance, and long-term business sustainability.

The paint/consumables/power tools industry can contribute to sustainability and play a significant role in creating a more environment-friendly industry through various practices and innovations.

However, the role and importance of sustainability varies from market to market, and it is crucial to understand the specific market needs and expectations to make the right strategic decisions.

## Painter Insight Monitor 2024 will focus on understanding the specific needs, preferences, and challenges faced by painters when it comes to sustainable products.

The report will shed some light on the topics below:

- ☐ Painters' perception of sustainability and sustainable products
- ☐ The penetration of sustainability in product choice of different categories (paint/consumables/power tools)
- ☐ Considerations for sustainability in product choice (e.g. ingredients/ materials, packaging, manufacturing process etc.)

# 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.

### ☐ **Lorem ipsum dolor sit amet**

Lorem ipsum dolor sit amet. Est possimus harum et aliquam expedita ea expedita perspiciatis est fugit nemo et nostrum iste sit eligendi harum et enim molestiae.

### ☐ **Et quod nobis eos quasi numquam et dolores magnam**

Lorem ipsum dolor sit amet. In possimus recusandae vel vitae autem ut aliquid odio quo velit deleniti ut quia nihil sed repellendus aspernatur et autem suscipit.

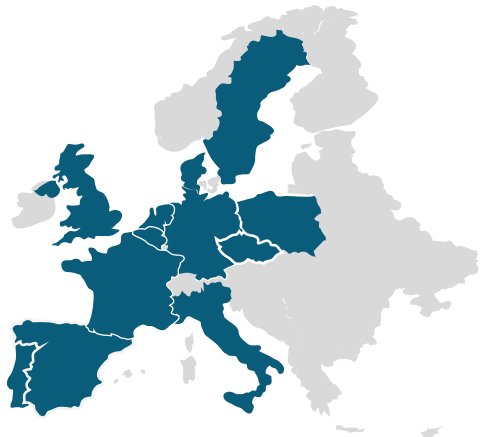
# Index

Management summary	
Profile of the painter	
Sustainability	
	Paint products
	Consumables
	Power tools
Appendix	





# Profile of the European Professional Painter



## Average age

May I ask your age for statistical purposes?



99  
years old

■ Generation Y (up to 42) ■ Generation X (43-58) ■ Baby boomers (59 and older)



## Building types

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



Residential

TOTAL

50%



Non-residential

50%

TOTAL



New build

50%



Renovation

50%

50%

50%

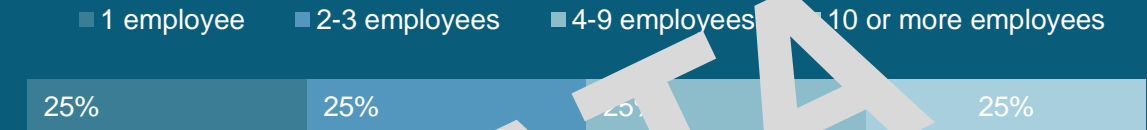
## Company size

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



AVERAGE  
number of full  
time employees

0.0



## Painting activity

What share (%) of the work time do you and your craftsmen spend on painting jobs?



AVERAGE  
% of time spent  
on painting jobs

50%

■ Multiskiller (10-49%) ■ Specialist painter (50-74%) ■ Hardcore painter (75-100%)



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

■ Strongly (Agree) ■ Neither agree nor disagree ■ (Strongly) Dissagree



## Painters current and expected business

Statement: I currently have more work compared to last year

■ (Strongly) Agree ■ Neither agree nor disagree ■ (Strongly) Dissagree



Statement: I expect my business will have more paint jobs in the coming year

■ (Strongly) Agree ■ Neither agree nor disagree ■ (Strongly) Dissagree



...

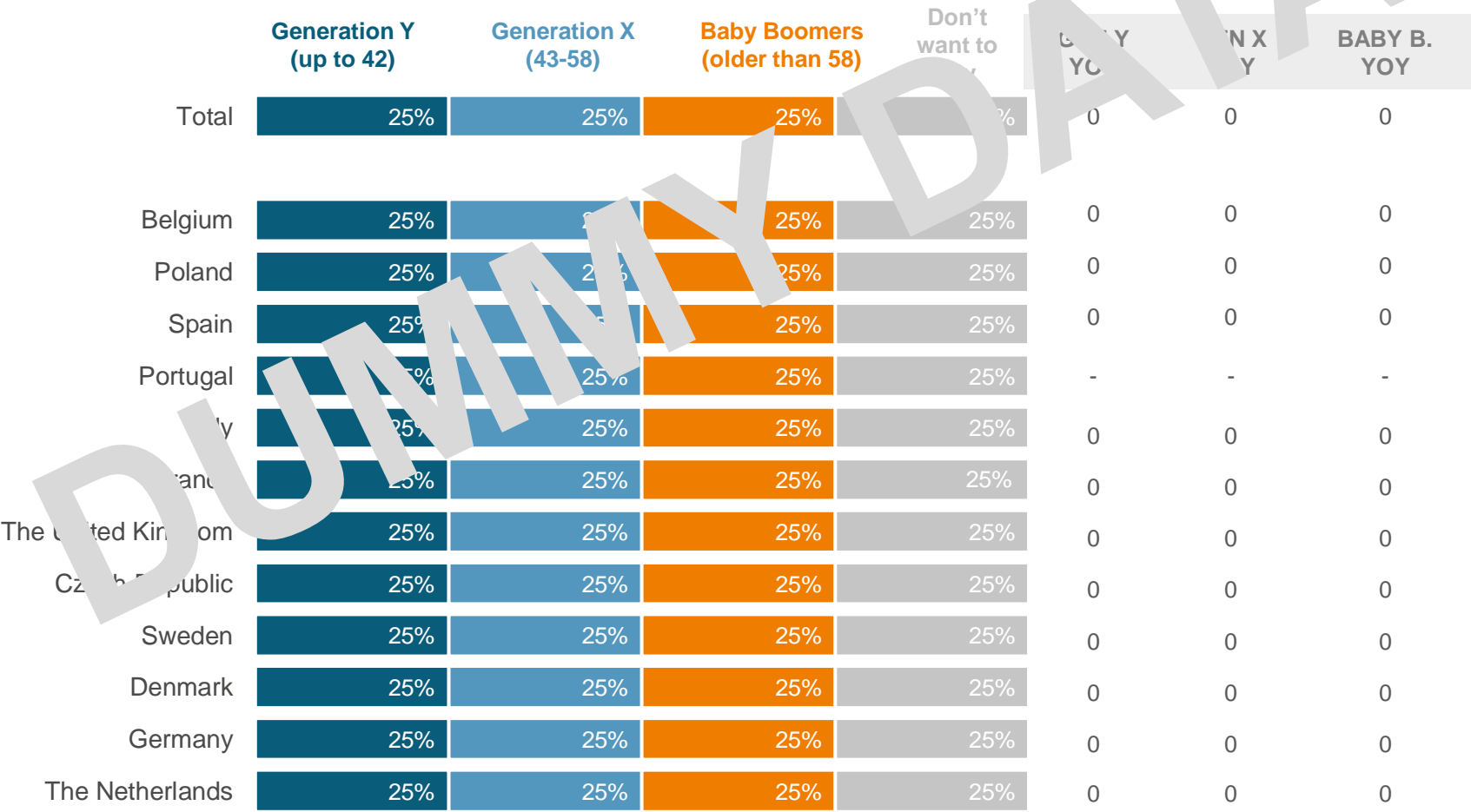
Company size distribution based on number of full-time employees (FTE)

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

	1 employee	2-3 employees	4-9 employees	10 or more employees	Don't want to say	AVERAGE 2024	AVERAGE 2023	YOY
Total	25%	25%	25%	25%	25%	0.5	0.5	0.5
Belgium	25%	25%	25%	25%	25%	0.5	0.5▼	0.5
Czech Republic	25%	25%	25%	25%	25%	0.5▲	0.5▼	0.5
Denmark	25%	25%	25%	25%	25%	0.5▲	0.5▼	0.5
France	25%	25%	25%	25%	25%	0.5	0.5	0.5
Germany	25%	25%	25%	25%	25%	0.5▼	0.5	0.5▲
Italy	25%	25%	25%	25%	25%	0.5▼	0.5	0.5▲
The Netherlands	25%	25%	25%	25%	25%	0.5	0.5	0.5▲
Poland	25%	25%	25%	25%	25%	0.5	0.5	0.5▲
Portugal	25%	25%	25%	25%	25%	0.5	0.5▲	0.5
Spain	25%	25%	25%	25%	25%	0.5	0.5▲	0.5
Sweden	25%	25%	25%	25%	25%			
The United Kingdom	25%	25%	25%	25%	25%	0.5	0.5	0.5

...

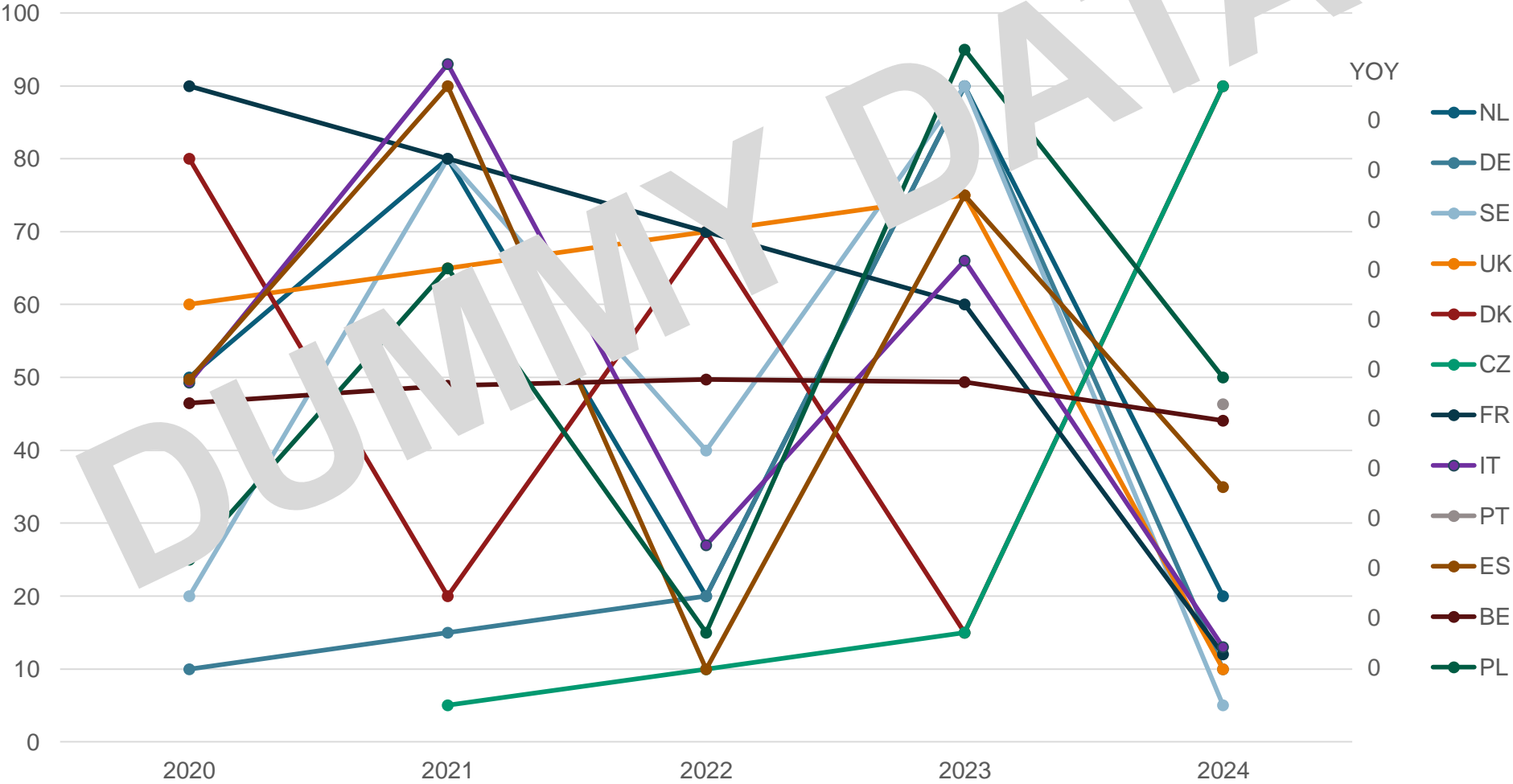
Age groups distribution  
Question: What is your age?



Base, total sample: N=1898 | NOTE: Year on Year (YoY) data change compared to the previous year is marked with green arrow ▲ indicating positive trend or red arrow ▼ indicating negative trend | YoY +/- 20% change 2023 vs 2024: green = higher in 2024, red = lower in 2024 | Historical trend is shown for measurements available from previous year(s)

...

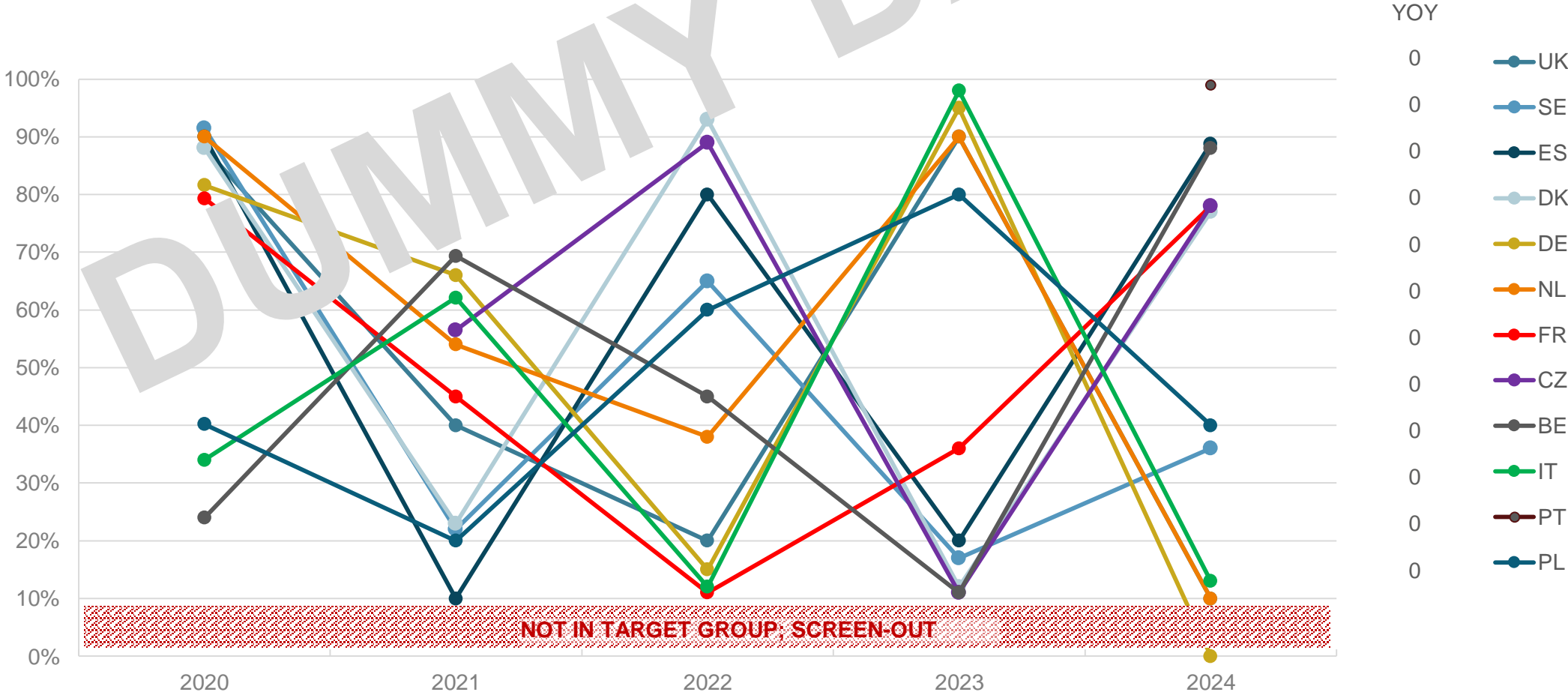
Average age - Trend  
Question: What is your age?



...

Time spent on painting activities (%) - Trend

Question: What share of their working time do your company's craftsmen spend on painting jobs?



...

Building types

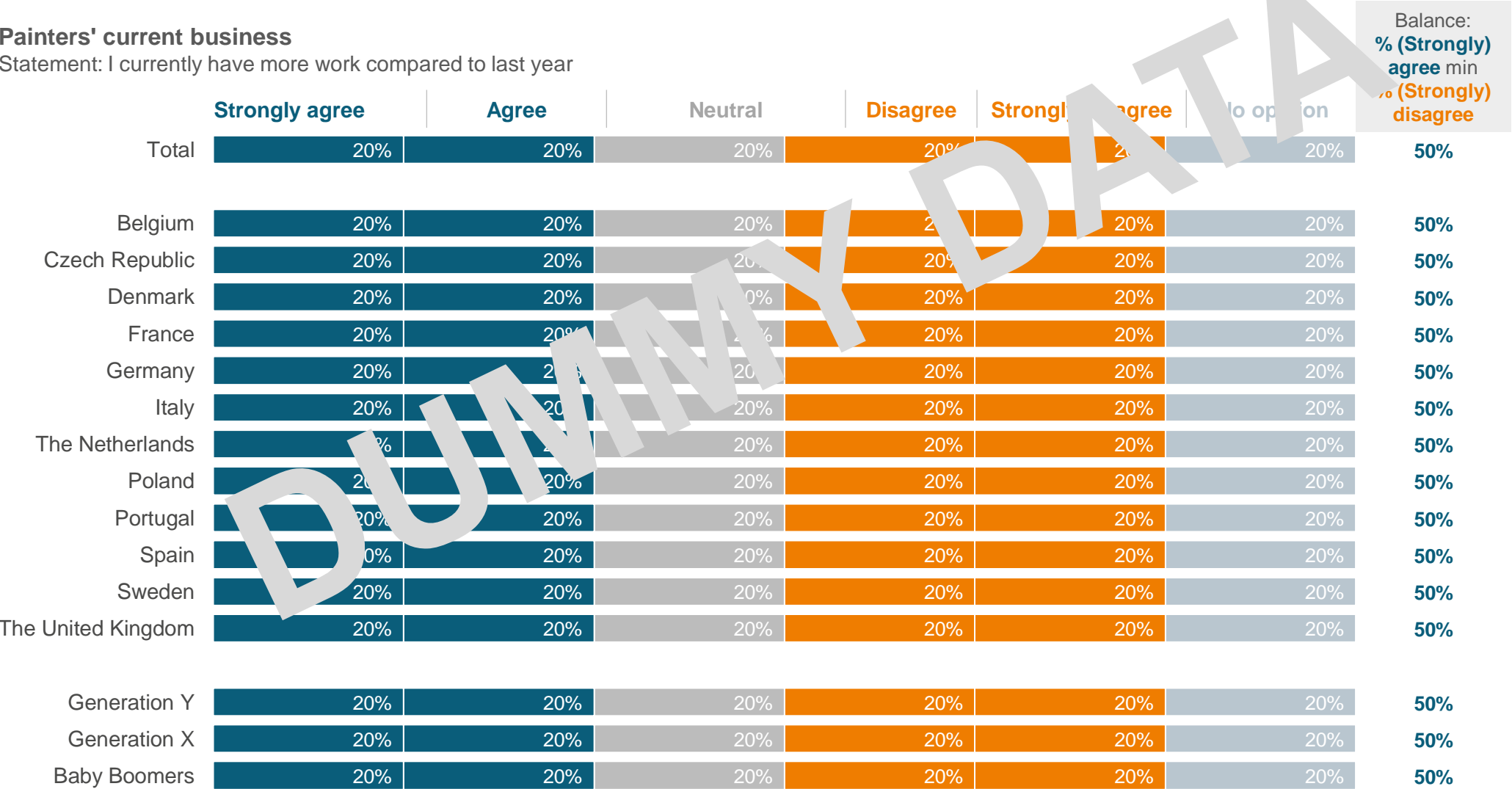
Question: Can you divide your company's total painting jobs (100%) over ... ?

	Residential		Non-residential		RESIDENTIAL		NON-RESIDENTIAL		NEW BUILD		RENOVATION	
	New Build	Renovation	New Build	Renovation	2024	YOY	2024	YOY	2024	YOY	2024	YOY
Total	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
BE	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
CZ	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
DK	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
FR	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
DE	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
IT	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
NL	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
PT	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
PL	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
ES	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
SE	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
UK	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
					50%	0%	50%	0%	50%	0%	50%	0%
1 FTE	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
2 - 3 FTE	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
4 - 9 FTE	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%
> 9 FTE	25%	25%	25%	25%	50%	0%	50%	0%	50%	0%	50%	0%

...

Painters' current business

Statement: I currently have more work compared to last year

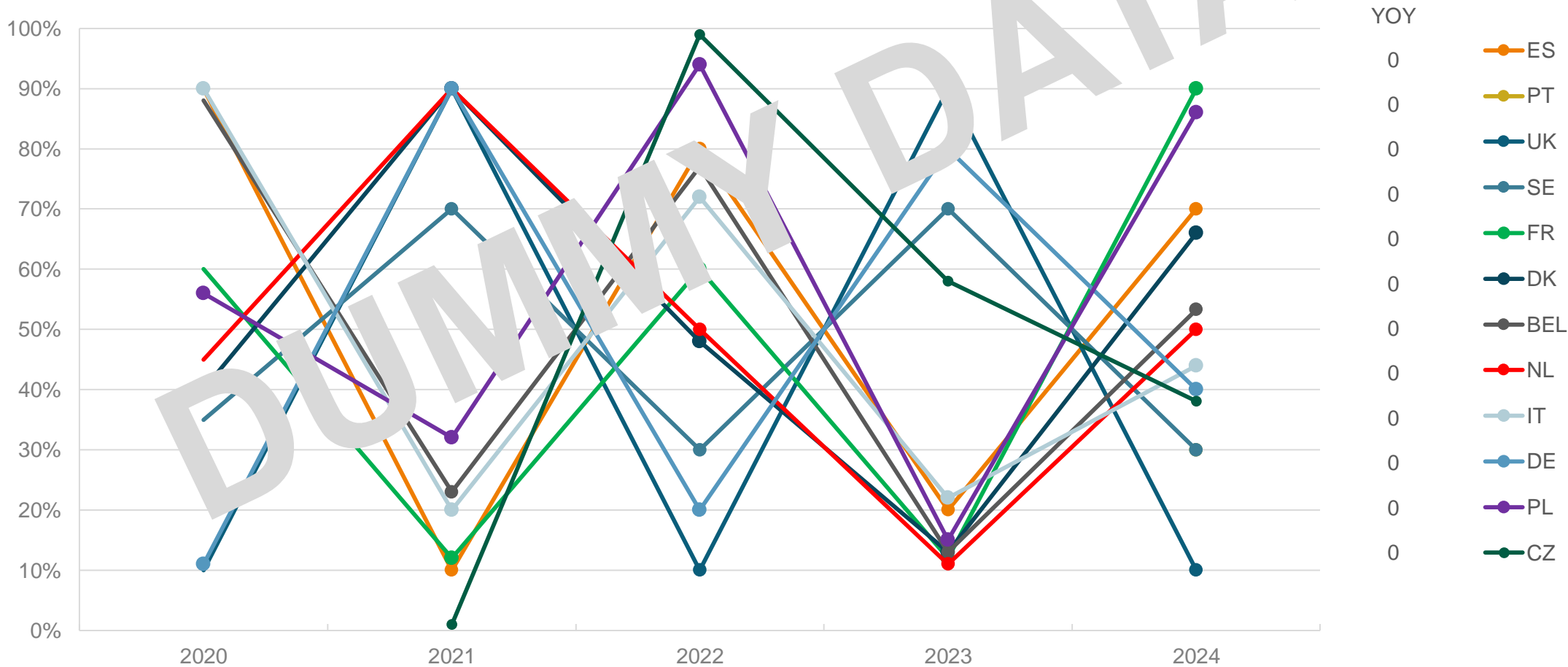


Base, total sample: N=1898

...

Painters' who expect growth of their business (% Agree and Strongly Agree) - Trend

Statement: I expect my business will have more paint jobs in the coming year

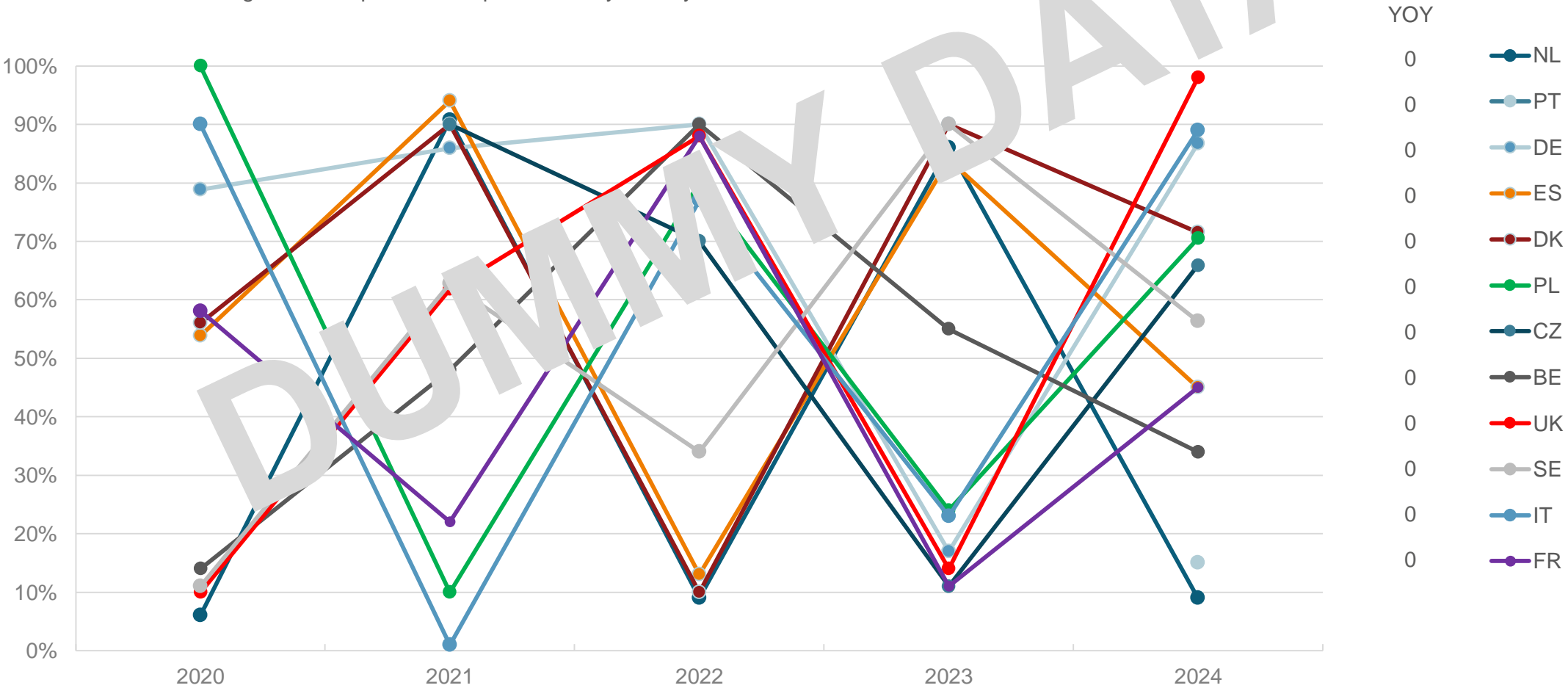




...

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

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



# Index

Management summary
Profile of the painter
Sustainability
Paint products
Consumables
Power tools
Appendix



# Introduction to the theme topic: Sustainability

This year, we investigate the topic of **sustainability** by asking painters questions about their perception to get a clear picture of their attitudes toward sustainability and how painting companies are incorporating sustainable products into their daily work.

## Product Categories Included

In this chapter, the provided data on the theme topic is based on questions asked about three product groups: **1) paint products**, **2) consumables** and **3) power tools**. The product groups were selected based on the products painters had purchased:

- Respondents who indicated purchasing at least one **paint product** (interior, exterior, wood or metal care) in the last 12 months were asked about sustainability in relation to paint products.
- Respondents who indicated purchasing at least one **consumable** (tapes, brushes and rollers, sealants, wall or wood filler, hand or machine sandpapers) in the last 12 months were asked about sustainability in relation to consumables.
- Respondents who indicated purchasing at least one **power tool** (sanding machines, airless or handheld paint sprayers, dust extractors) in the last 4 years were asked about sustainability in relation to power tools.

Respondents who use sustainable products always or often in the selected product group were asked **what makes them care** about and use sustainable products. Those who use them sometimes, rarely or never were asked **what is stopping them** from using sustainable products more frequently.

## The Report Structure

The sustainability chapter first presents some general results for all product categories. After that, we delve deeper into each product group: **1) paint products**, **2) consumables** and **3) power tools**, to explore in detail what painters think about sustainable products within each of these categories.



...

**Definition of sustainability – all product categories: FIRST PART of all re-coded answers**  
Question: What describes a **sustainable product** best according to you?

ZOOMING IN ON COUNTRIES

	TOTAL	BE	FR	DE	IT	NL	PL	ES	UK	DK	SE	CZ	PT
	N=1898	N=150	N=200	N=195	N=195	N=150	N=200	N=149	N=151	N=151	N=151	N=126	N=125
Durability	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Environmentally friendly	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Water-based	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Solvent-free	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Biodegradable products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Energy efficiency	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Recyclability of packaging	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Safe to use	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Certifications	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Low-VOC and zero VOC	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

NOTE: Observed change by +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country

...

Definition of sustainability – all product categories: SECOND PART of all re-coded answers

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

	TOTAL	BE	FR	DE	IT	ES	PL	ES	UK	DK	SE	CZ	PT
	N=1898	N=150	N=200	N=195	N=150	N=150	N=200	N=149	N=151	N=151	N=151	N=126	N=125
Produced from recycled materials	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Containing recyclable materials	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Preservative-free	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Recycled products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Quality products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Waste recycling services	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Low carbon footprint	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Clear environmental impact data	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Bulk packaging	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Transparent supply chain	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

NOTE: Observed change by +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country |

...

Definition of sustainability / VERBATIMS of spontaneous answers – all product categories

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

Examples what is generating top 3 answers

Examples of other, namely' answers

Long lifetime /  
Lifespan/ Durability

Environmentally  
friendly products

Water-based  
products

...with positive conotation

...with negative conotation

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

“Lorem ipsum dolor sit  
amet.”

...

What makes painters care – all product categories

Question: What makes you care about and use sustainable products on your paint job

BOOMING IN ON COUNTRIES

	TOTAL	BE	FR	DE	IT	ES	PL	ES	UK	DK	SE	CZ	PT
	N=1503	N=135	N=175	N=114	N=114	N=125	N=152	N=124	N=131	N=101	N=141	N=77	N=111
Personal care for the environment	10 %	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Sustainable products are more efficient	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Long-term cost savings	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Interest for better working conditions	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Customers are asking for sustainable products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Quality of sustainable products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Law and regulations	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Professional reputation	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Interest in trying out new products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Recommendations from suppliers	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Recommendations from other painters	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country |

...

What is stopping painters – all product categories

Question: What is stopping you from using **sustainable products** more often?

	TOTAL	BE	FR	DE	IT	NL	PL	ES	UK	DK	SE	CZ	PT
	N=612	N=29	N=46	N=112	N=69	N=36	N=41	N=41	N=53	N=43	N=28	N=60	N=42
High prices	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
No information from manufacturers	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Worse quality than other products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Unclear benefits for the end user	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Too complicated	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Clients do not ask for it	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Availability issues	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Energy efficiency lower than expected	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Require additional knowledge	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Long payback period	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country



Willingness to pay more – all product categories

Question: How much more in price % compared to regular products are you willing to pay for sustainable products for your paint jobs?

	More than 20%	16 to 20%	11 to 15%	6 to 10%	1 to 5%	Not willing to pay more	No opinion	ALL willing to pay more
Total	14%	14%	14%	14%	14%	14%	14%	0%
Belgium	14%	14%	14%	14%	14%	14%	14%	0%
Czech Republic	14%	14%	14%	14%	14%	14%	14%	0%
Denmark	14%	14%	14%	14%	14%	14%	14%	0%
France	14%	14%	14%	14%	14%	14%	14%	0%
Germany	14%	14%	14%	14%	14%	14%	14%	0%
Italy	14%	14%	14%	14%	14%	14%	14%	0%
The Netherlands	14%	14%	14%	14%	14%	14%	14%	0%
Poland	14%	14%	14%	14%	14%	14%	14%	0%
Portugal	14%	14%	14%	14%	14%	14%	14%	0%
Spain	14%	14%	14%	14%	14%	14%	14%	0%
Sweden	14%	14%	14%	14%	14%	14%	14%	0%
The United Kingdom	14%	14%	14%	14%	14%	14%	14%	0%
Baby Boomers	14%	14%	14%	14%	14%	14%	14%	0%
Generation Y	14%	14%	14%	14%	14%	14%	14%	0%
Generation X	14%	14%	14%	14%	14%	14%	14%	0%

...

Main decision criteria when buying sustainable products – all product categories: FIRST PART of all re-coded answers

Question: What would be your main decision criteria when buying sustainable products?

	TOTAL	BE	FR	DE	IT	NL	PL	ES	UK	IT	SE	CZ	PT
	N=1898	N=150	N=200	N=195	N=150	N=150	N=200	N=149	N=151	N=151	N=151	N=126	N=125
Durability	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Quality and ease of use	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Price compared to regular products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Environmentally friendly	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Trust in the brand	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Safe to use	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Certifications	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Energy efficiency	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Biodegradable products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Discounts for sustainable products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Solvent-free products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Water-based products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country |

...

Main decision criteria when buying sustainable products – all product categories: SECOND PART of all re-coded answers

Question: What would be your main decision criteria when buying sustainable products?

	TOTAL	BE	FR	DE	IT	NL	PL	ES	UK	SE	CZ	PT
	N=1898	N=150	N=200	N=195	N=150	N=150	N=200	N=149	N=151	N=151	N=126	N=125
Low-VOC and zero-VOC products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Customers' requests and preferences	0%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Recyclability of packaging	0%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Low carbon footprint	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Preservative-free products	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Produced from recycled materials	0%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Clear environmental impact data	0%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Containing recyclable materials	0%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Transparent supply chain	0%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Recycled products	0%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Waste recycling services	0%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Bulk packaging	0%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country |

...

Main decision criteria when buying sustainable products / VERBATIMS of spontaneous answers – all product categories

Question: What would be your main decision criteria when buying sustainable products?

Examples what is generating top 3 answers

Long lifetime /  
Lifespan/ Durability

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

Quality and ease of use  
of the product

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

Price compared to  
regular product

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

Other, namely

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

“Lorem ipsum dolor sit amet.”

Question: To what extent do you agree that the following action would motivate painters to buy more **sustainable products**?

**‘More information on the benefits of sustainable products from manufacturers to painters’**

(Strongly) Agree | Neutral | Disagree (Strongly) | No opinion

Balance:  
% (Strongly) agree min  
% (Strongly) disagree

Total	20%	20%	20%	20%	20%	50%
BE	20%	20%	20%	20%	20%	50%
CZ	20%	20%	20%	20%	20%	50%
DK	20%	20%	20%	20%	20%	50%
FR	20%	20%	20%	20%	20%	50%
IT	20%	20%	20%	20%	20%	50%
DE	20%	20%	20%	20%	20%	50%
PT	20%	20%	20%	20%	20%	50%
PL	20%	20%	20%	20%	20%	50%
ES	20%	20%	20%	20%	20%	50%
SE	20%	20%	20%	20%	20%	50%
UK	20%	20%	20%	20%	20%	50%
NL	20%	20%	20%	20%	20%	50%

Baby B.	20%	20%	20%	20%	20%	50%
Gen X	20%	20%	20%	20%	20%	50%
Gen Y	20%	20%	20%	20%	20%	50%

**‘More information on the benefits of sustainable products from manufacturers to end-users’**

(Strongly) Agree | Neutral | Disagree (Strongly) | No opinion

Balance:  
% (Strongly) agree min  
% (Strongly) disagree

Country	2019	2020	2021	2022	2023	2024
BE	20%	20%	20%	20%	20%	50%
CZ	20%	20%	20%	20%	20%	50%
DK	20%	20%	20%	20%	20%	50%
FR	20%	20%	20%	20%	20%	50%
DE	20%	20%	20%	20%	20%	50%
IT	20%	20%	20%	20%	20%	50%
NL	20%	20%	20%	20%	20%	50%
PT	20%	20%	20%	20%	20%	50%
PL	20%	20%	20%	20%	20%	50%
ES	20%	20%	20%	20%	20%	50%
SE	20%	20%	20%	20%	20%	50%
UK	20%	20%	20%	20%	20%	50%

Baby B.	20%	20%	20%	20%	20%	50%
Gen Y	20%	20%	20%	20%	20%	50%
Gen X	20%	20%	20%	20%	20%	50%

## Painters sentiment – Manufacturers needed actions

‘Manufacturers’ take-back programs for old/replaced products’						Balance: % (Strongly) agree min % (Strongly) disagree
(Strongly) Agree   Neutral   Disagree (Strongly)   No opinion						
Total	20%	20%	20%	20%	20%	50%
BE	20%	20%	20%	20%	20%	50%
CZ	20%	20%	20%	20%	20%	50%
DK	20%	20%	20%	20%	20%	50%
FR	20%	20%	20%	20%	20%	50%
DE	20%	20%	20%	20%	20%	50%
IT	20%	20%	20%	20%	20%	50%
NL	20%	20%	20%	20%	20%	50%
PT	20%	20%	20%	20%	20%	50%
PL	20%	20%	20%	20%	20%	50%
ES	20%	20%	20%	20%	20%	50%
SE	20%	20%	20%	20%	20%	50%
UK	20%	20%	20%	20%	20%	50%
Gen Y	20%	20%	20%	20%	20%	50%
Gen X	20%	20%	20%	20%	20%	50%
Baby B.	20%	20%	20%	20%	20%	50%

‘Manufacturers should increase the volume/speed to replace current assortment with more sustainable products’						Balance: % (Strongly) agree min % (Strongly) disagree
(Strongly) Agree   Neutral   Disagree (Strongly)   No opinion						
Total	20%	20%	20%	20%	20%	50%
BE	20%	20%	20%	20%	20%	50%
CZ	20%	20%	20%	20%	20%	50%
DK	20%	20%	20%	20%	20%	50%
FR	20%	20%	20%	20%	20%	50%
DE	20%	20%	20%	20%	20%	50%
IT	20%	20%	20%	20%	20%	50%
NL	20%	20%	20%	20%	20%	50%
PT	20%	20%	20%	20%	20%	50%
PL	20%	20%	20%	20%	20%	50%
ES	20%	20%	20%	20%	20%	50%
SE	20%	20%	20%	20%	20%	50%
UK	20%	20%	20%	20%	20%	50%
Baby B.	20%	20%	20%	20%	20%	50%
Gen X	20%	20%	20%	20%	20%	50%
Gen Y	20%	20%	20%	20%	20%	50%

# Sustainability Attitude of the European Professional Painter



## PERCEPTION - Definition of sustainability

What describes a sustainable #product# best according to you?

	ALL PRODUCT CATEGORIES	paint products	consumables	power tools
Durability	#1 33%	#1 33%	#1 33%	#1 33%
Environmentally friendly	#1 33%	#1 33%	#1 33%	#1 33%
Water-based	#1 33%	#1 33%	#1 33%	#1 33%
Produced from/containing recycled materials	#1 33%	#1 33%	#1 33%	#1 33%
Energy-efficiency	#1 33%	#1 33%	#1 33%	#1 33%

## DRIVERS - What makes painters care

What makes you care about and use sustainable #product# on your paint job?

	ALL PRODUCT CATEGORIES	paint products	consumables	power tools
Personal care for the environment	#1 33%	#1 33%	#1 33%	#1 33%
Sustainable products are more efficient	#1 33%	#1 33%	#1 33%	#1 33%
Long term cost savings	#1 33%	#1 33%	#1 33%	#1 33%
Customers asking for it	#1 33%	#1 33%	#1 33%	#1 33%

## PURCHASE - Main decision criteria

What would be your main decision criteria when buying sustainable #product#?

	ALL PRODUCT CATEGORIES	paint products	consumables	power tools
Durability	#1 33%	#1 33%	#1 33%	#1 33%
Quality	#1 33%	#1 33%	#1 33%	#2 33%
Price	#1 33%	#1 33%	#1 33%	#3 33%

Base, total sample: N=1898

## BARRIERS – What is stopping painters

What is stopping you from using sustainable products more often?



## Painters willing to pay more

Are you willing to pay more for sustainable products for your paint jobs?



# Index

Management summary
Profile of the painter
Sustainability
Paint products
Consumables
Power tools
Appendix





...



Definition of sustainability – paint products: TOP 8 re-coded answers

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

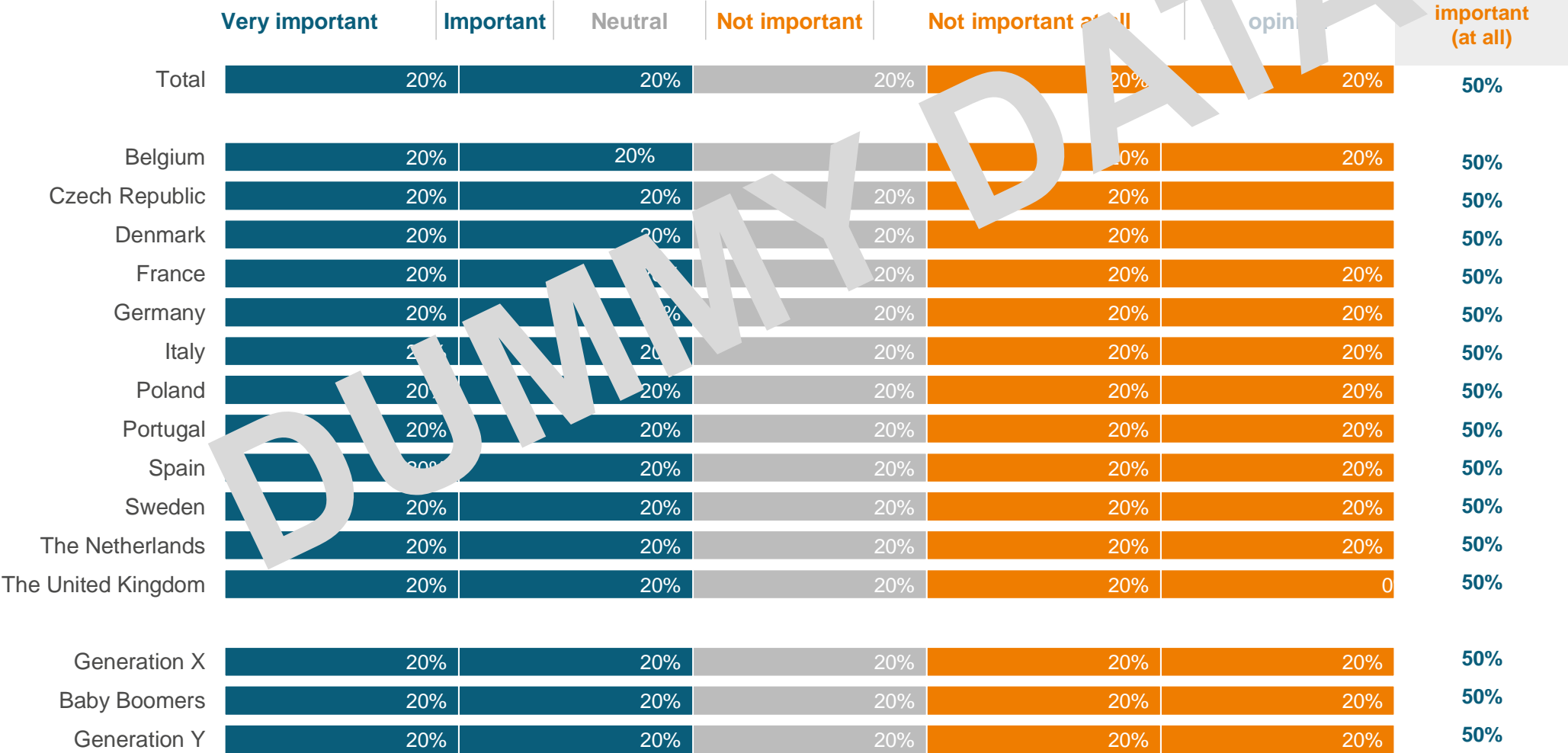
	TOTAL	BE	FR	DE	IT	NL	PL	ES	CZ	DK	SE	CZ	PT
	N=635	N=49	N=67	N=66	N=47	N=50	N=51	N=50	N=51	N=51	N=50	N=43	N=42
Durability	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Environmentally friendly	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Water-based	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Free of harmful chemicals*	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Biodegradable products	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Certifications	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Safe to use	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Recyclability of packaging	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country



Importance of sustainability when buying – paint products

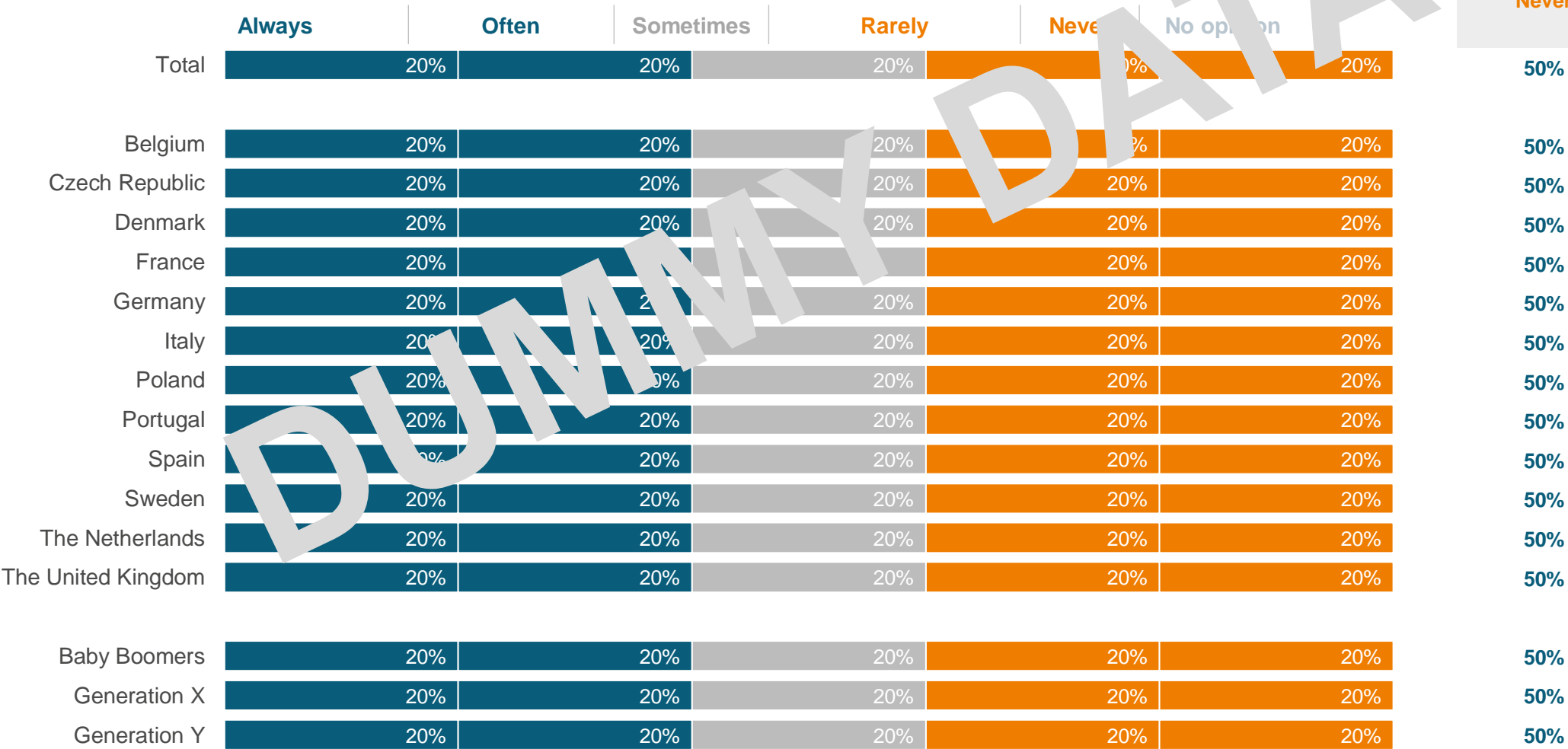
Question: How important are the sustainability aspects when buying paint products for your paint jobs?



...

Frequency of usage – sustainable paint products

Question: And how often do you use sustainable paint products?

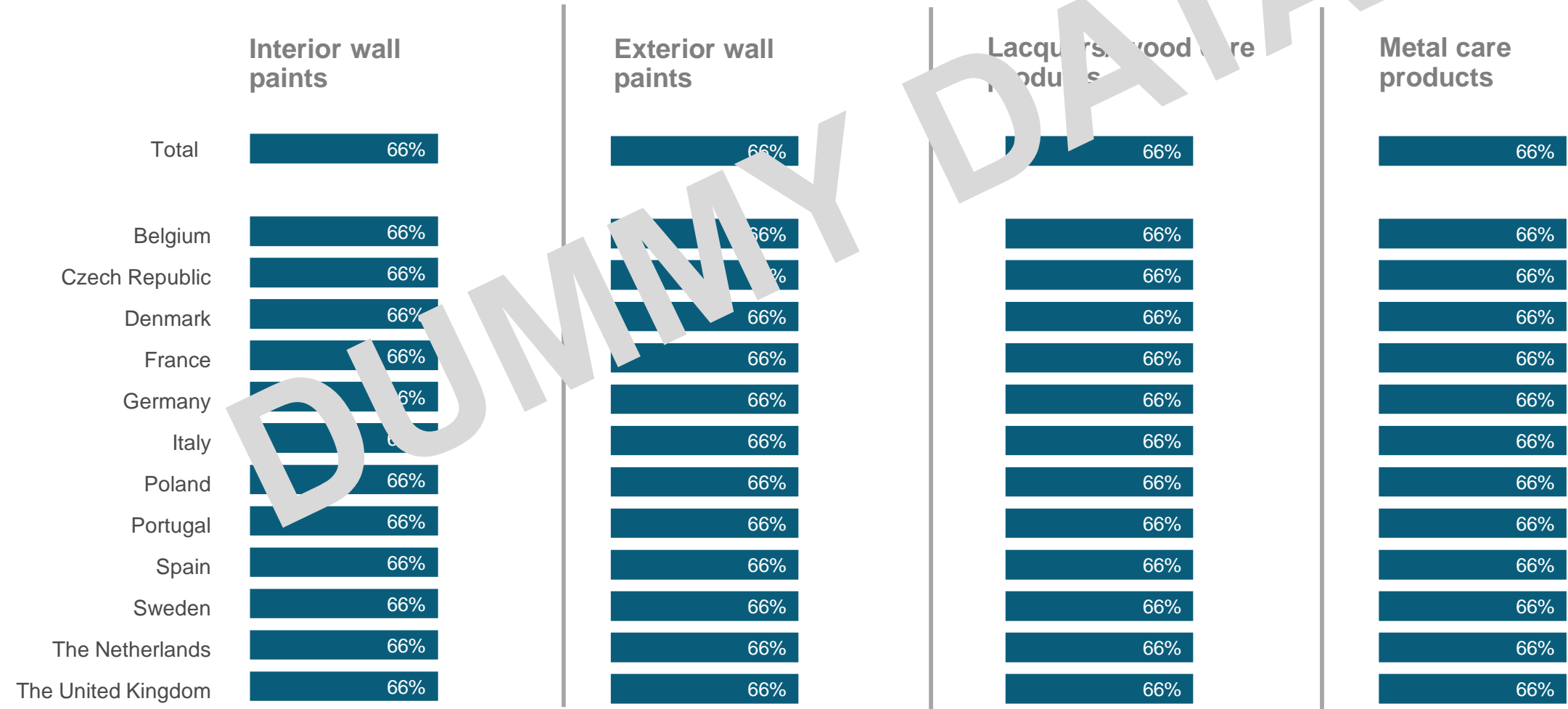


...



Usage of sustainable products – per individual paint product

Question: For which specific paint product do you use sustainable products?



...



What makes painters care – paint products: TOP 8 re-coded answers

Question: What makes you care about and use sustainable paint products on your paint job?

	TOTAL	BE	FR	DE	IT	NL	PL	PT	SE	CZ	DK	SE	CZ	PT
	N=536	N=48	N=62	N=41	N=41	N=46	N=41	N=43	N=46	N=39	N=46	N=31	N=40	
Personal care for the environment	33 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Customers are asking for it	33 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Sustainable products are more efficient	33 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Interest for better working conditions	33 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Long-term cost savings	33 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Quality of sustainable products	33 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Laws and regulations	33 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Professional reputation	33 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

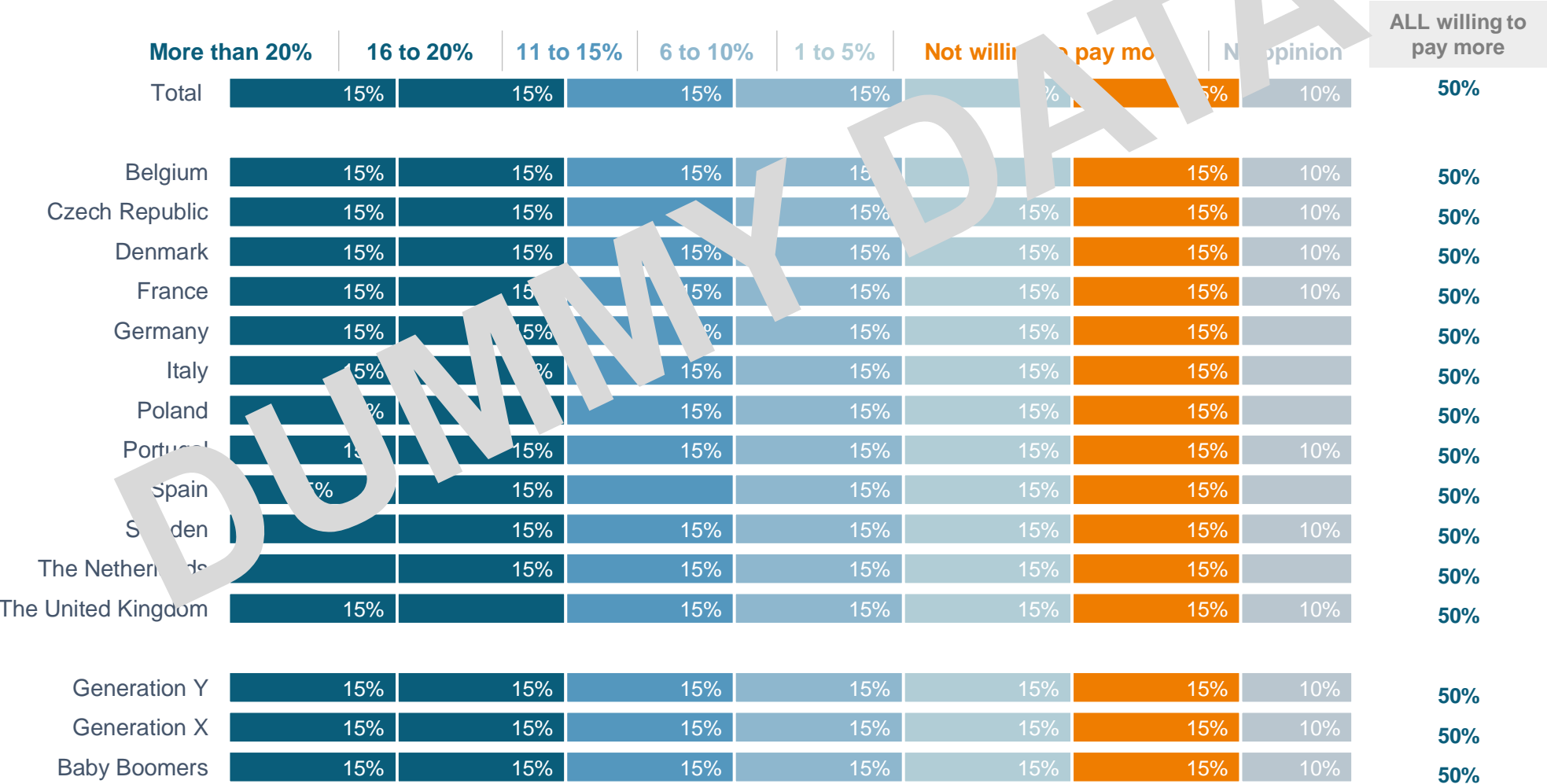
NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country |



...

Willingness to pay more – paint products

Question: How much more in price % compared to regular products are you willing to pay for sustainable paint products for your painting job?



...



Main decision criteria when buying sustainable products – paint products: TOP 8 re-coded answers

Question: What would be your main decision criteria when buying sustainable paint products?

	TOTAL	BE	FR	DE	IT	NL	PL	ES	UK	DK	SE	CZ	PT
	N=635	N=49	N=67	N=66	N=47	N=51	N=68	N=51	N=51	N=51	N=50	N=43	N=42
Durability	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Quality and ease of use	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Price compared to regular products	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Environmentally friendly	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Free of harmful chemicals*	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Safe to use	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Trust in the brand	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Certifications	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

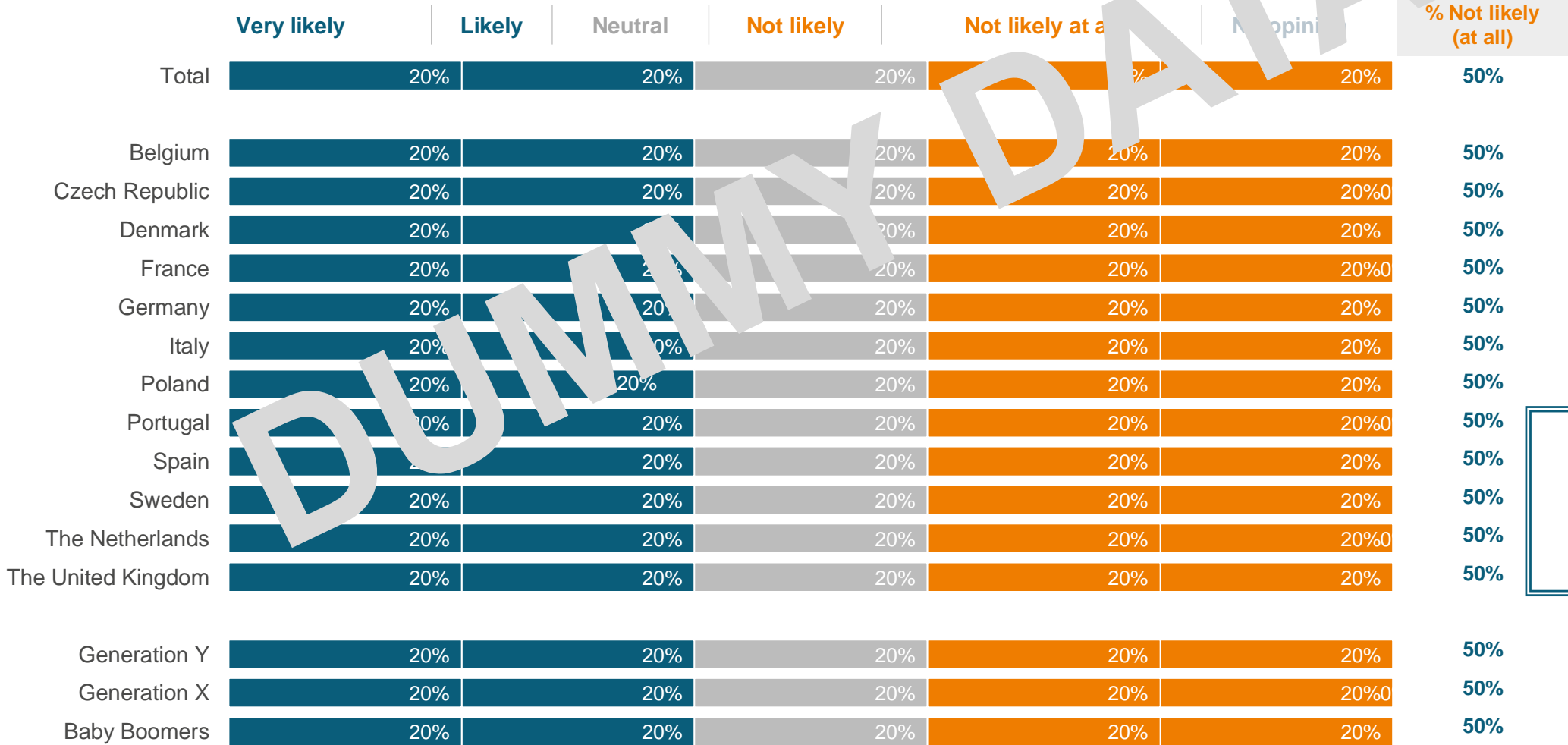
NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country



...

Willingness to switch from a preferred brand – paint products

Question: If you can buy a more sustainable product when it comes to **paint products** you are using currently and if your preferred brand does not offer it, how likely are you then willing to switch from your preferred brand?



ZOOMING IN ON COUNTRIES



# Index

Management summary
Profile of the painter
Sustainability
Paint products
Consumables
Power tools
Appendix



...



**Definition of sustainability – consumables: TOP 8 re-coded answers**

Question: What describes a **sustainable consumables** best according to you?

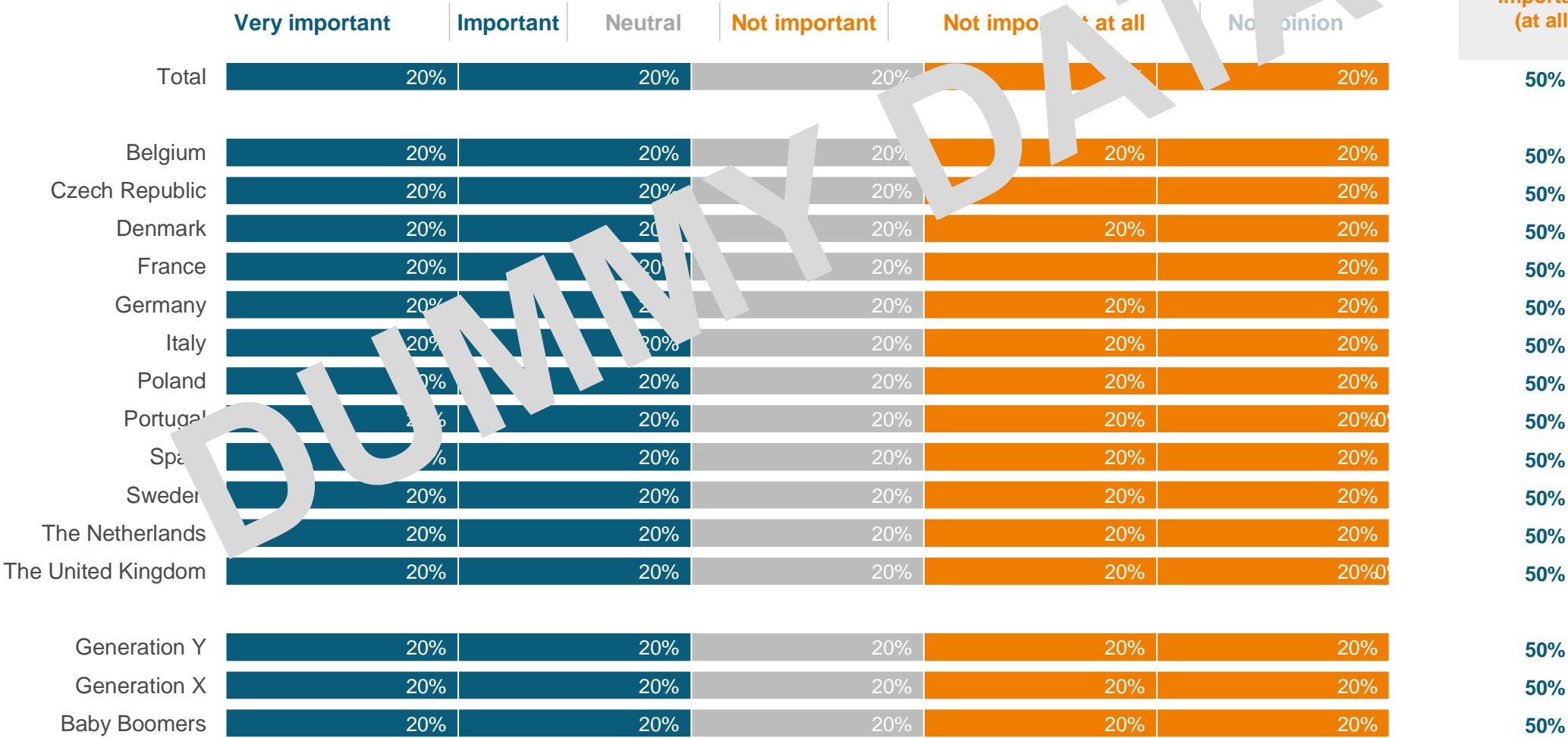
	TOTAL	BE	FR	DE	IT	NL	PL	ES	UK	DK	SE	CZ	PT
	N=630	N=51	N=66	N=64	N=50	N=50	N=61	N=59	N=51	N=50	N=50	N=41	N=42
Durability	40 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Environmentally friendly	40 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Produced from/containing recycled materials*	40 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Recyclability of packaging	40 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Biodegradable products	40 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Certifications	40 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Safe to use	40 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Recycled products	40 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country |

...

Importance of sustainability when buying – consumables

Question: How important are the sustainability aspects when buying **consumables** for your paint jobs?



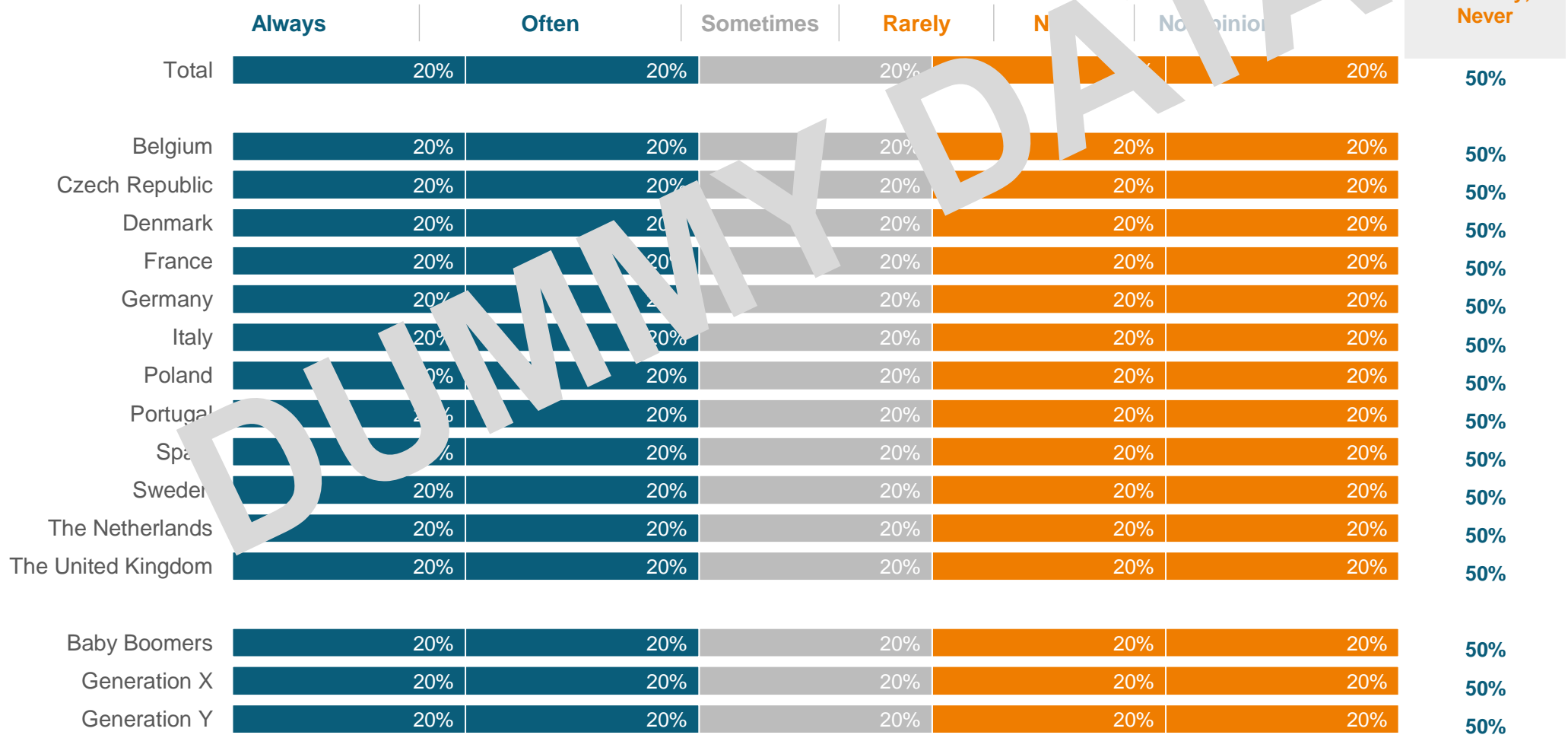
Balance:  
% (Very) important min  
% Not important (at all)



...

Frequency of usage – sustainable consumables

Question: And how often do you use **sustainable consumables**?

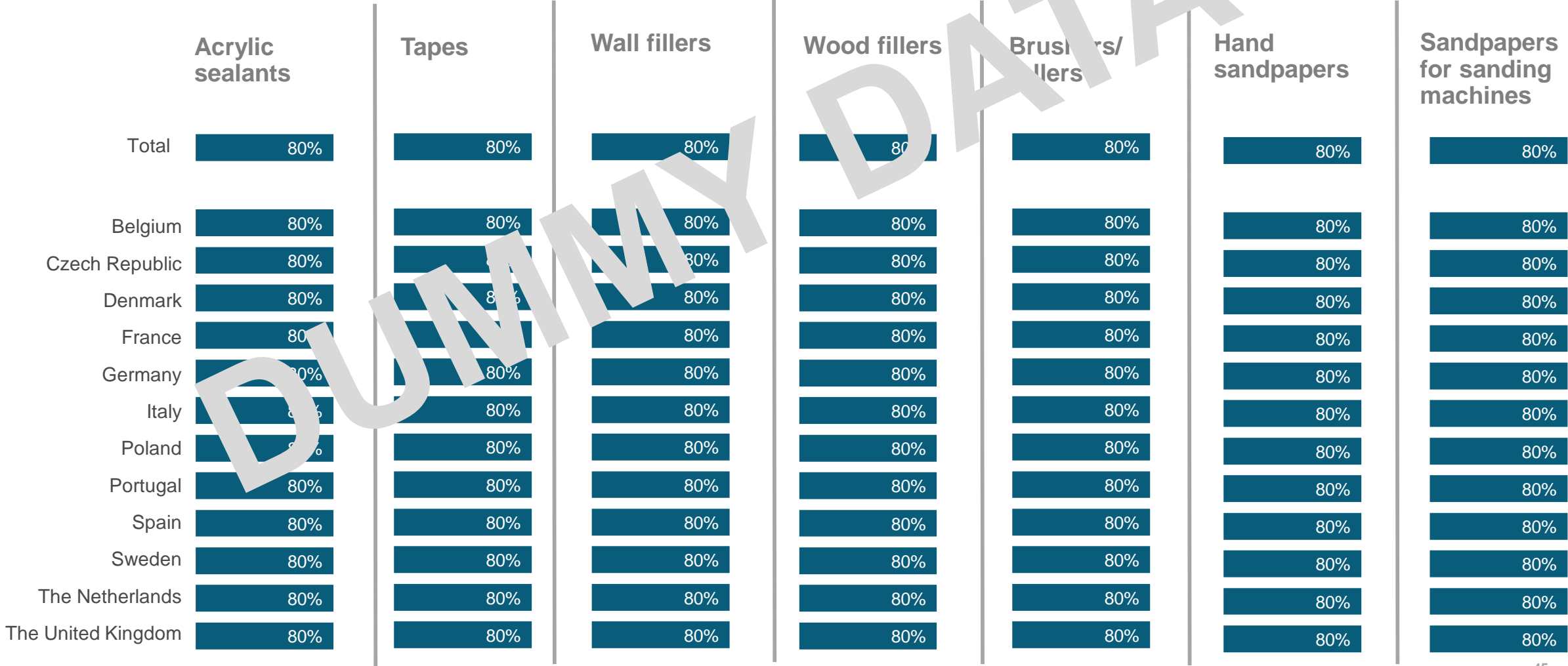


...

Usage of sustainable products – per individual consumables

Question: For which specific **consumables** do you use sustainable products?

ZOOMING IN ON COUNTRIES



...



What makes painters care – consumables: TOP 8 re-coded answers

Question: What makes you care about and use **sustainable consumables** on your paint job?

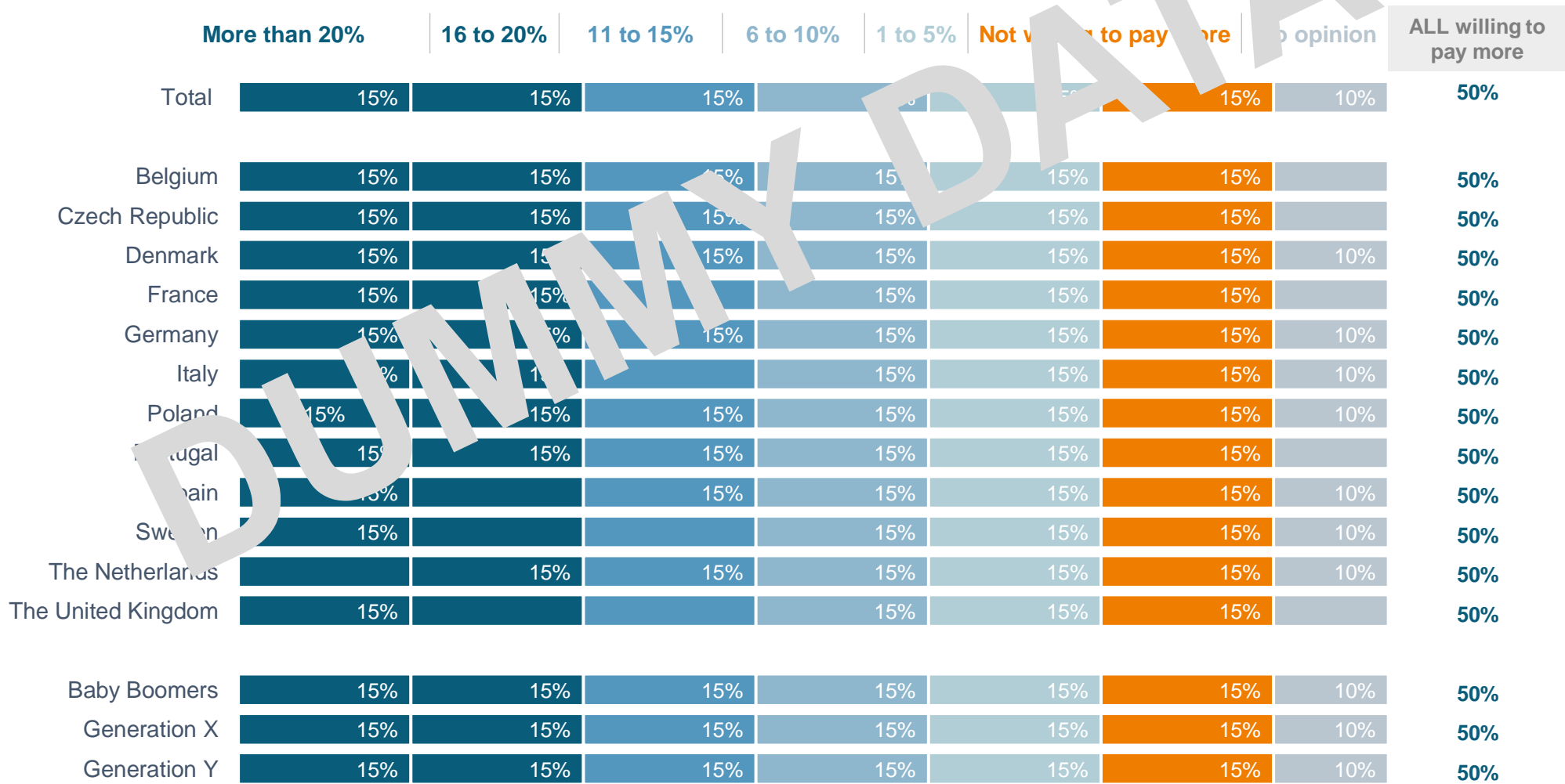
	TOTAL	BE	FR	DE	IT	NL	PL	ES	UK	DK	SE	CZ	PT
	N=485	N=43	N=57	N=35	N=39	N=37	N=47	N=45	N=45	N=32	N=48	N=23	N=35
Personal care for the environment	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
They are more efficient	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Long-term cost savings	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Customers are asking for it	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Quality of sustainable products	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Interest for better working conditions	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Laws and regulations	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Professional reputation	30%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country |

...

Willingness to pay more – consumables

Question: How much more in price % compared to regular products are you willing to pay for **sustainable consumables** for your paint job?



Base, Consumables sample: N=630

...



Main decision criteria when buying sustainable products – consumables: TOP 8 re-coded answers

Question: What would be your main decision criteria when buying sustainable consumables?

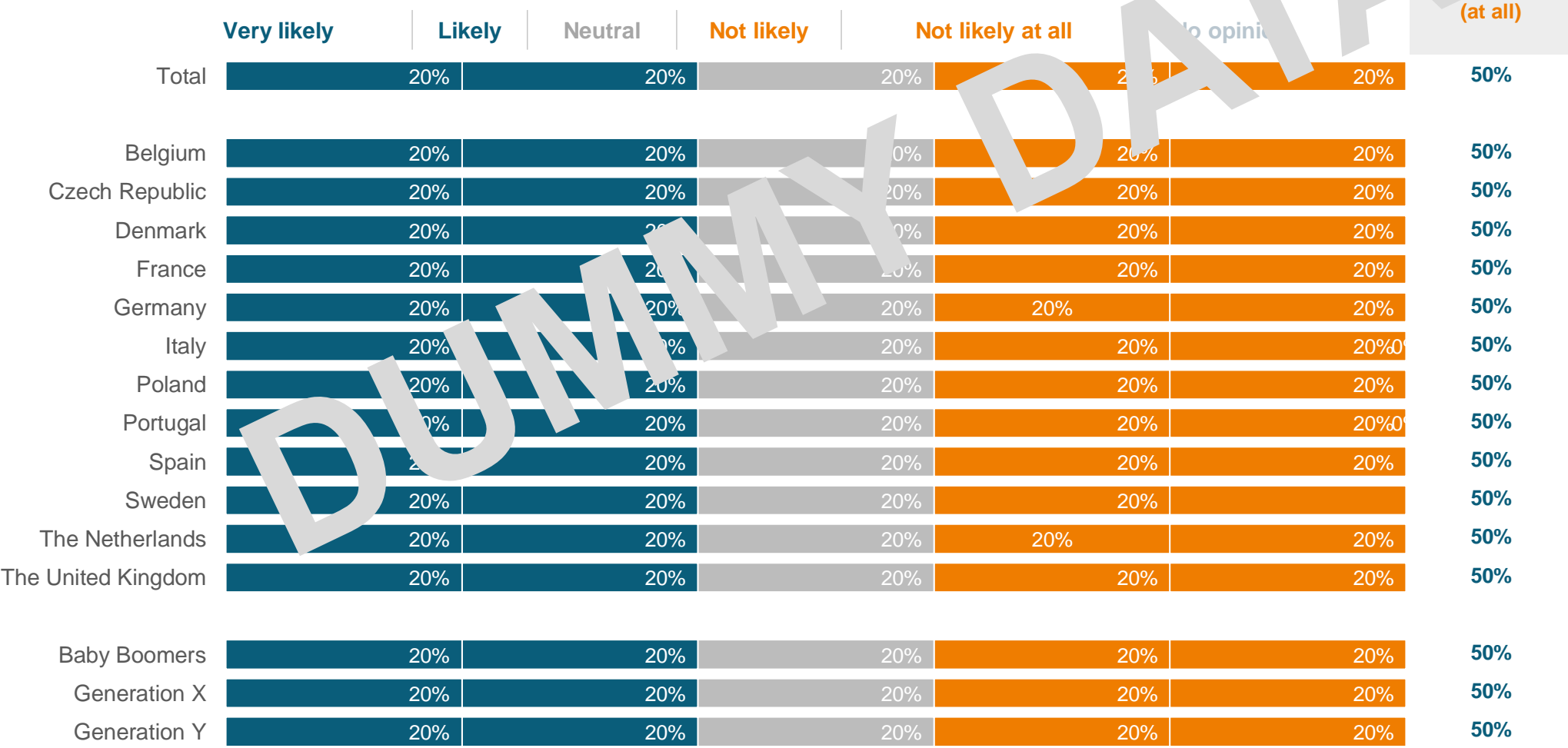
	TOTAL	BE	FR	DE	IT	NL	PL	ES	UK	DK	SE	CZ	PT
	N=630	N=51	N=66	N=64	N=50	N=50	N=66	N=49	N=51	N=50	N=50	N=41	N=42
Durability	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Quality and ease of use	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Price compared to regular products	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Environmentally friendly	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Biodegradable products	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Safe to use	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Trust in the brand	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Certifications	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%



...

Willingness to switch from a preferred brand – consumables

Question: If you can buy a more sustainable product when it comes to **consumables** you are using currently and if your preferred brand does not offer it, how likely are you then willing to switch from your preferred brand?



Base, Consumables sample: N=630

# Index

Management summary
Profile of the painter
Sustainability
Paint products
Consumables
Power tools
Appendix



...



Definition of sustainability – power tools: TOP 8 re-coded answers

Question: What describes a sustainable power tool best according to you?

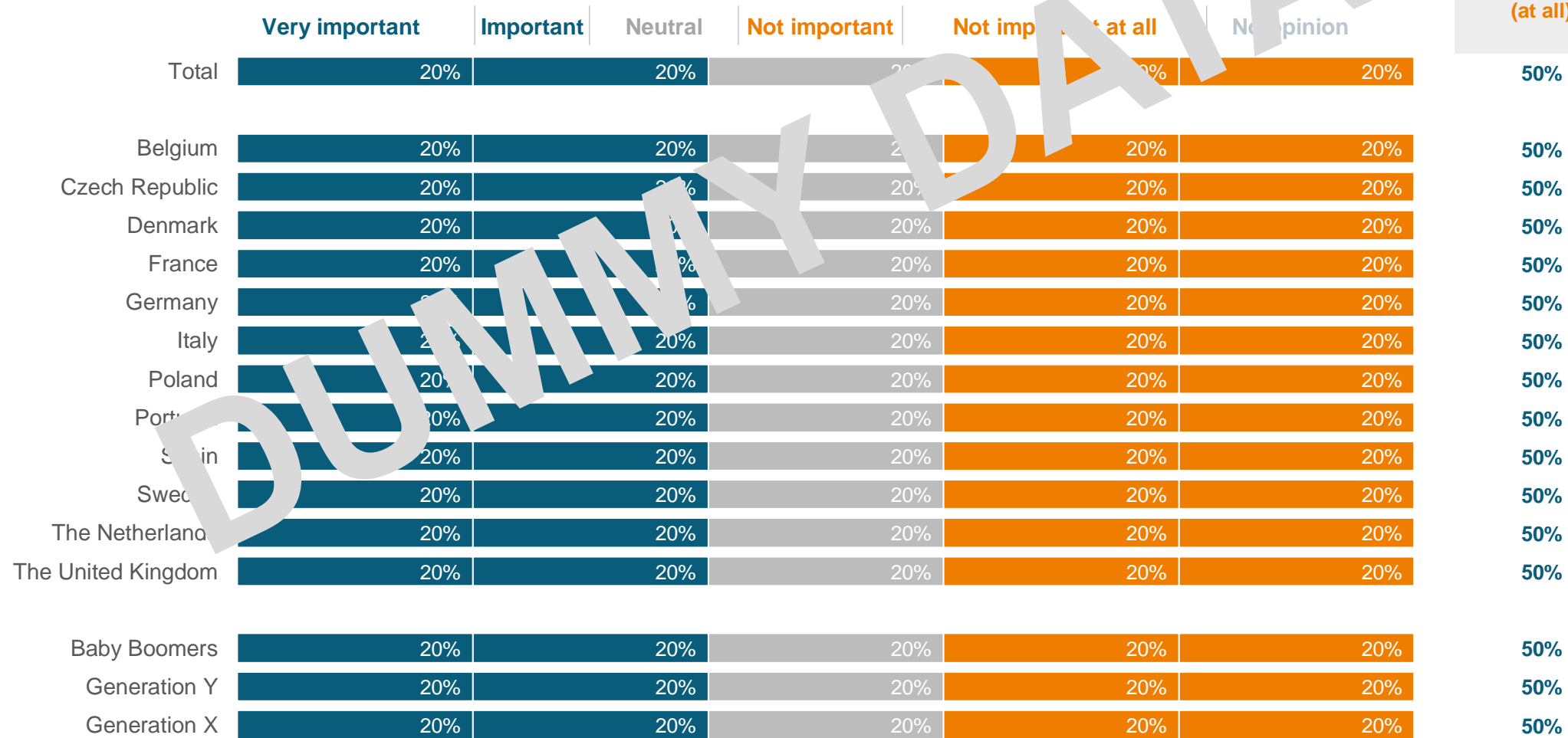
	TOTAL	BE	FR	IT	PL	ES	UK	DK	SE	CZ	PT	
	N=633	N=47	N=47	N=45	N=49	N=66	N=50	N=47	N=50	N=51	N=40	N=41
Durability	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Environmentally friendly	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Energy-efficient products	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Safe to use	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Produced from/containing recycled materials	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Certifications	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Recyclability of packaging	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Refurbished (recycled) product	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country |

...

Importance of sustainability when buying – power tools

Question: How important are the sustainability aspects when buying **power tools** for your paint jobs?



Balance:  
% (Very)  
important min  
% Not  
important  
(at all)

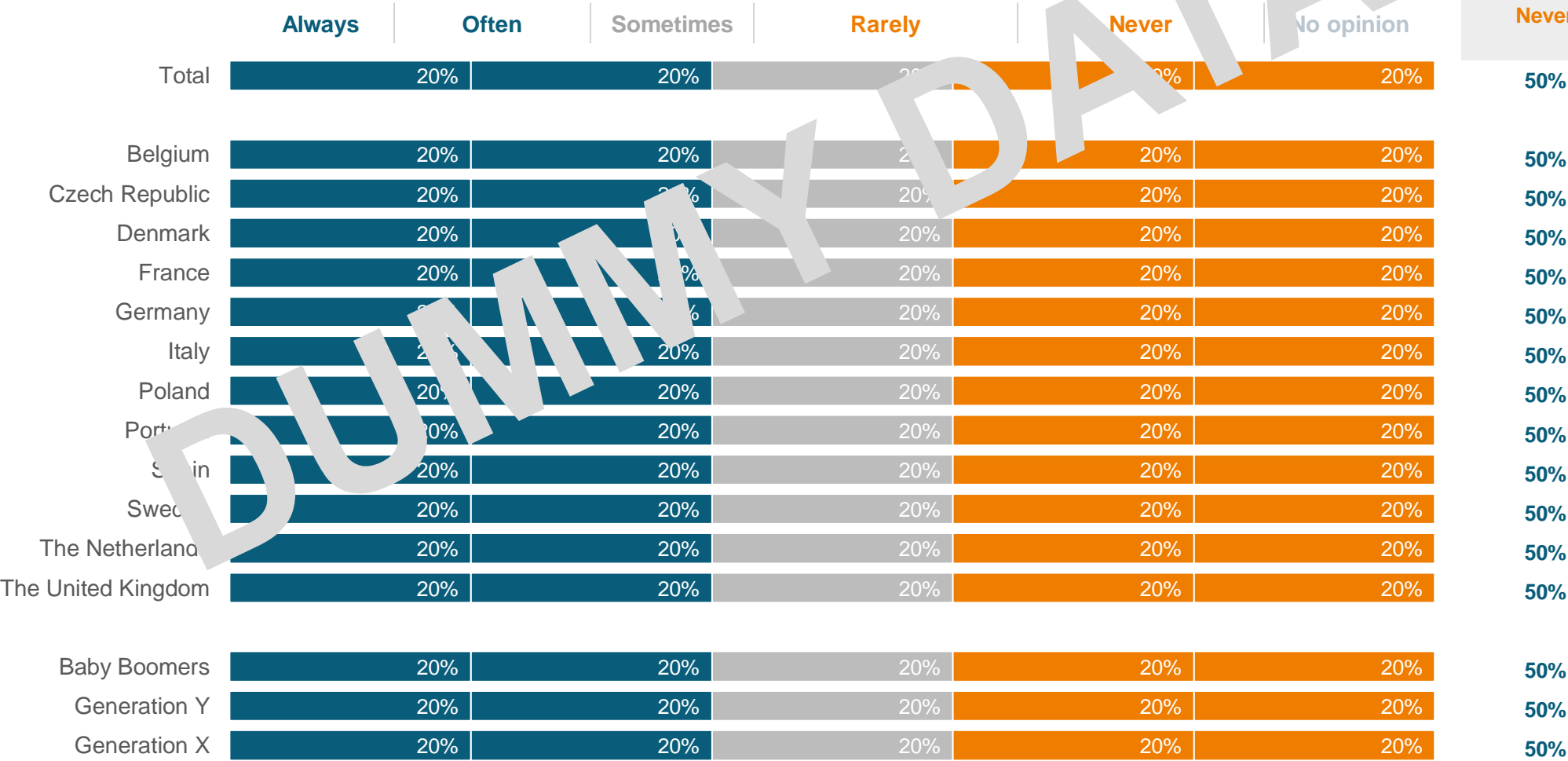


...

Frequency of usage – sustainable power tools

Question: And how often do you use sustainable power tools?

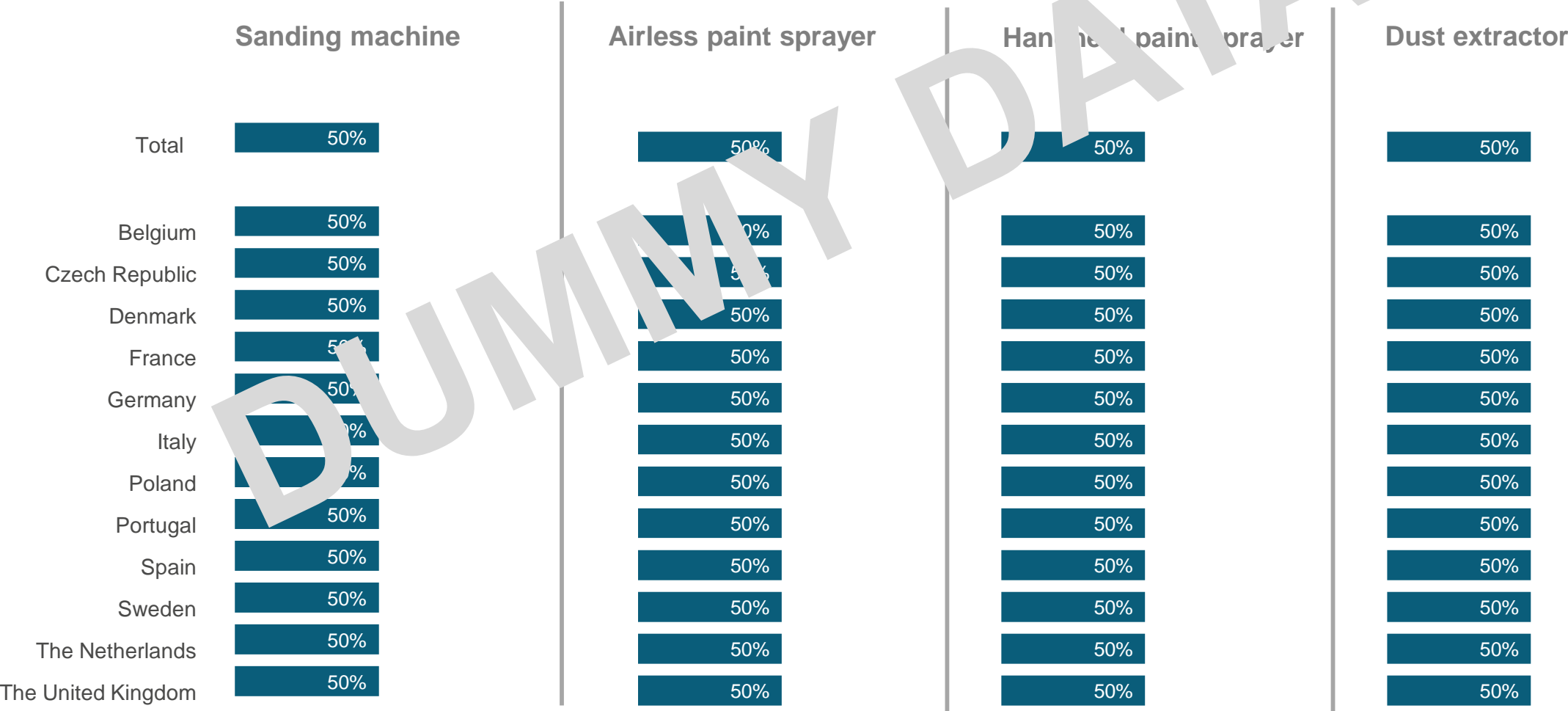
Balance:  
% Always,  
Often min  
% Rarely,  
Never



...

Usage of sustainable products – per individual power tool

Question: For which specific **power tools** do you use sustainable products?



Base, Sanding machines: N = 439; Airless paint sprayer: N = 243; Handheld paint sprayer: N = 213; Dust extractor: N = 276

...



What makes painters care – power tools: TOP 8 re-coded answers

Question: What makes you care about and use sustainable power tools on your paint job?

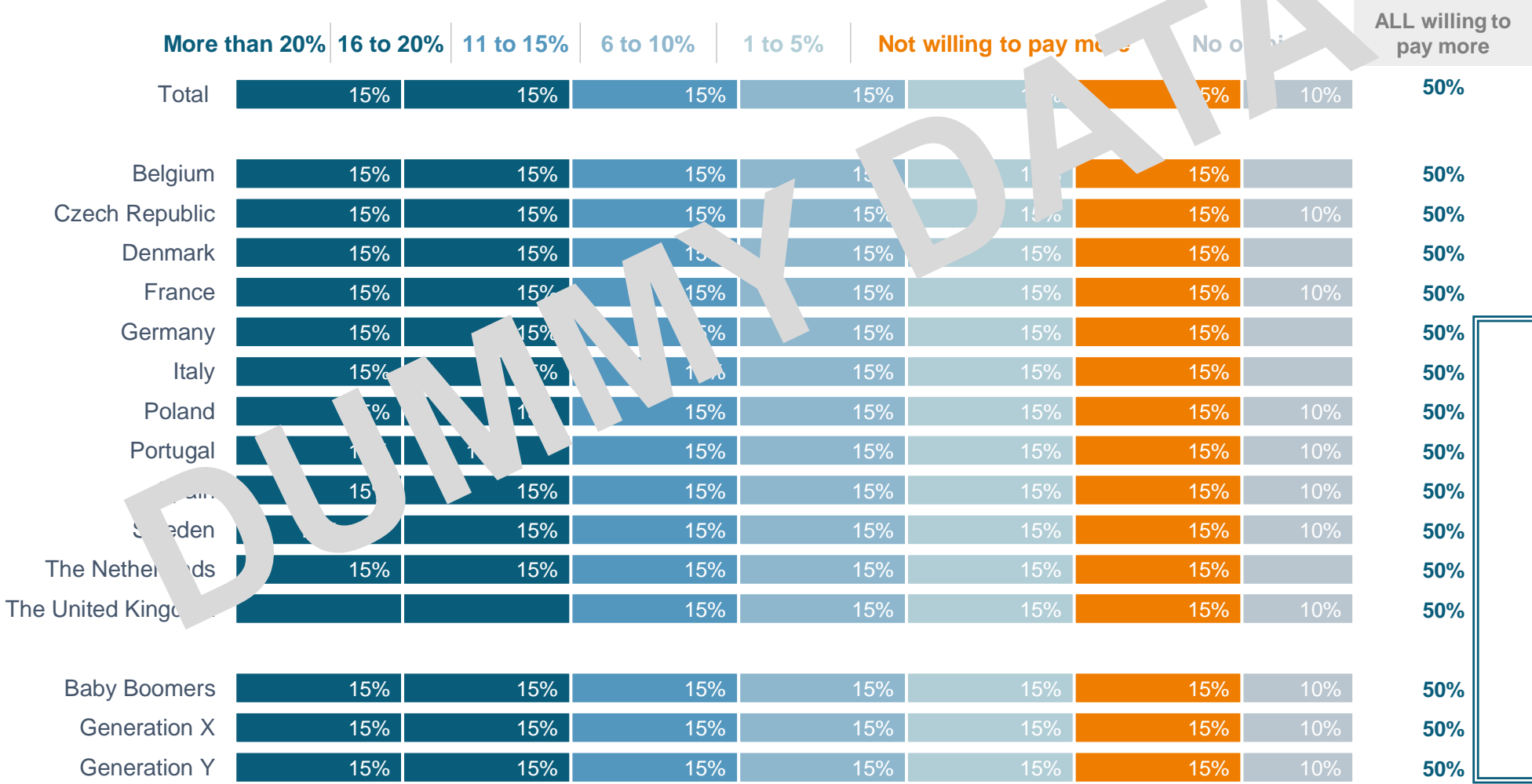
	TOTAL	BE	FR	DE	IT	NL	PL	PT	SE	DK	CZ	PT	
	N=482	N=44	N=56	N=38	N=37	N=42	N=51	N=3	N=	N=30	N=47	N=23	N=36
Long-term cost savings	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Sustainable products are more efficient	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Personal care for the environment	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Interest for better working conditions	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Customers are asking for it	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Quality of sustainable products	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Laws and regulations	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Professional reputation	33%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country |

...

Willingness to pay more – power tools

Question: How much more in price % compared to regular products are you willing to pay for sustainable power tools for your paint jobs?



ZOOMING IN ON COUNTRIES



...



Main decision criteria when buying sustainable products – power tools: TOP 8 re-coded answers

Question: What would be your main decision criteria when buying sustainable power tools?

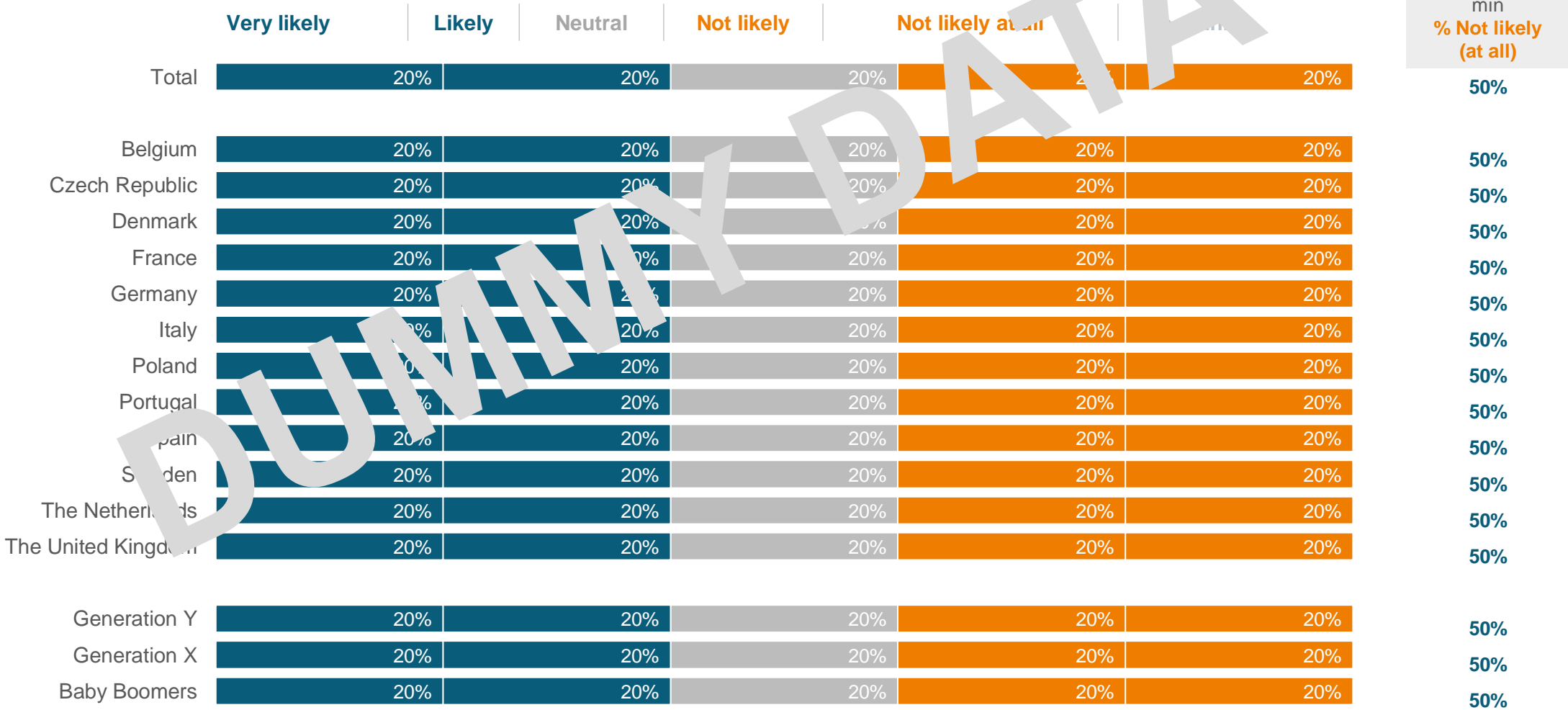
	TOTAL	BE	FR	DE	IT	NL	PL	ES	PT	SE	CZ	PT
	N=633	N=50	N=67	N=65	N=53	N=49	N=66	N=50	N=50	N=51	N=42	N=41
Durability	30 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Quality and ease of use	30 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Price compared to regular products	30 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Trust in the brand	30 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Certifications	30 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Energy-efficiency	30 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Environmentally friendly	30 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Safe to use	30 %	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%

NOTE: Observed change of +/- 20% of calculated shares difference between results Total vs Country: green = higher in that country, red = lower in that country |

...

Willingness to switch from a preferred brand – power tools

Question: If you can buy a more sustainable product when it comes to **power tools** you are using currently and if your preferred brand does not offer it, how likely are you then willing to switch from your preferred brand?



# Index

Management summary	
Profile of the painter	
Sustainability	
	Paint products
	Consumables
	Power tools
Appendix	

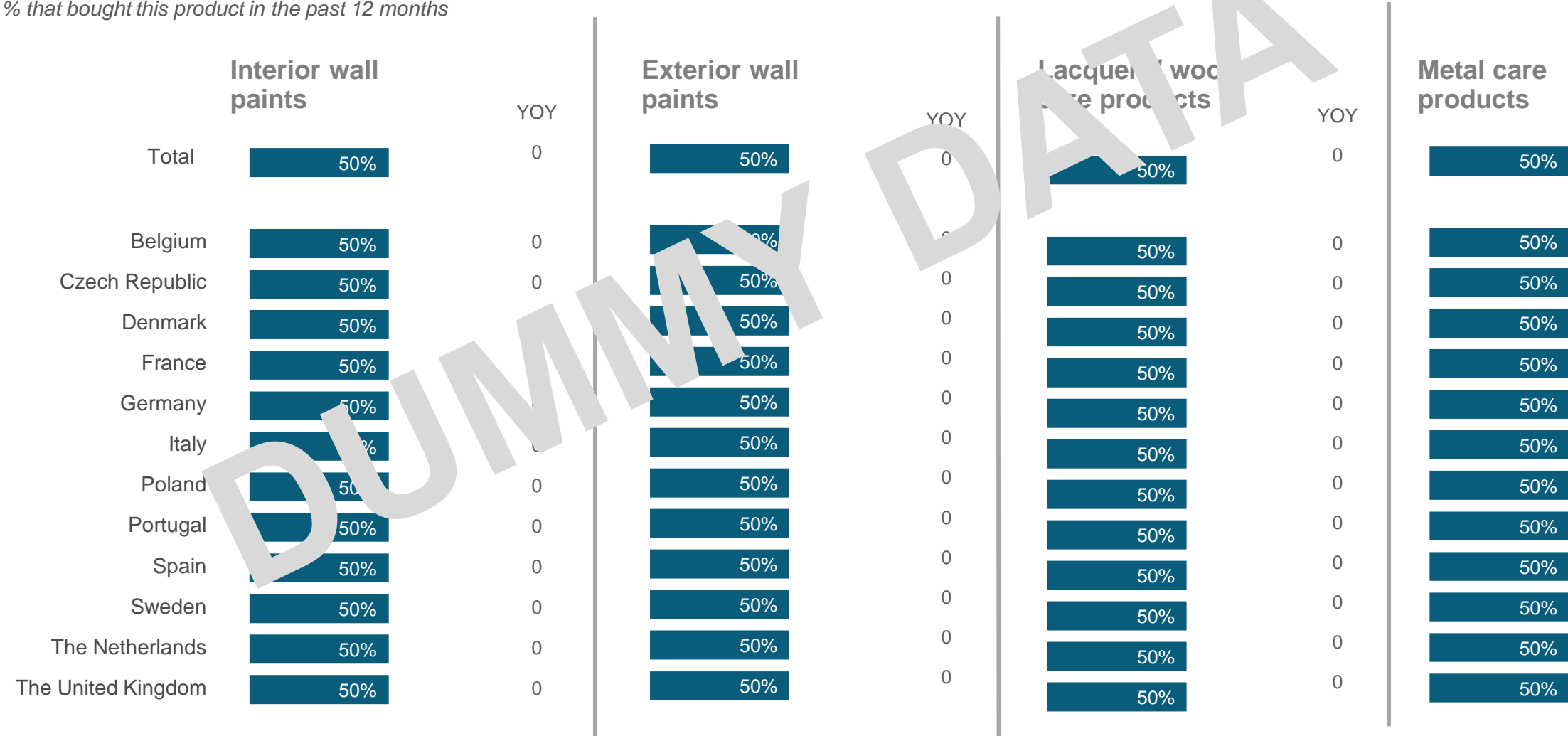


...



Purchase of paint products

Question: Can you indicate whether you have purchased any of the following paint products in the past 12 months?  
% that bought this product in the past 12 months

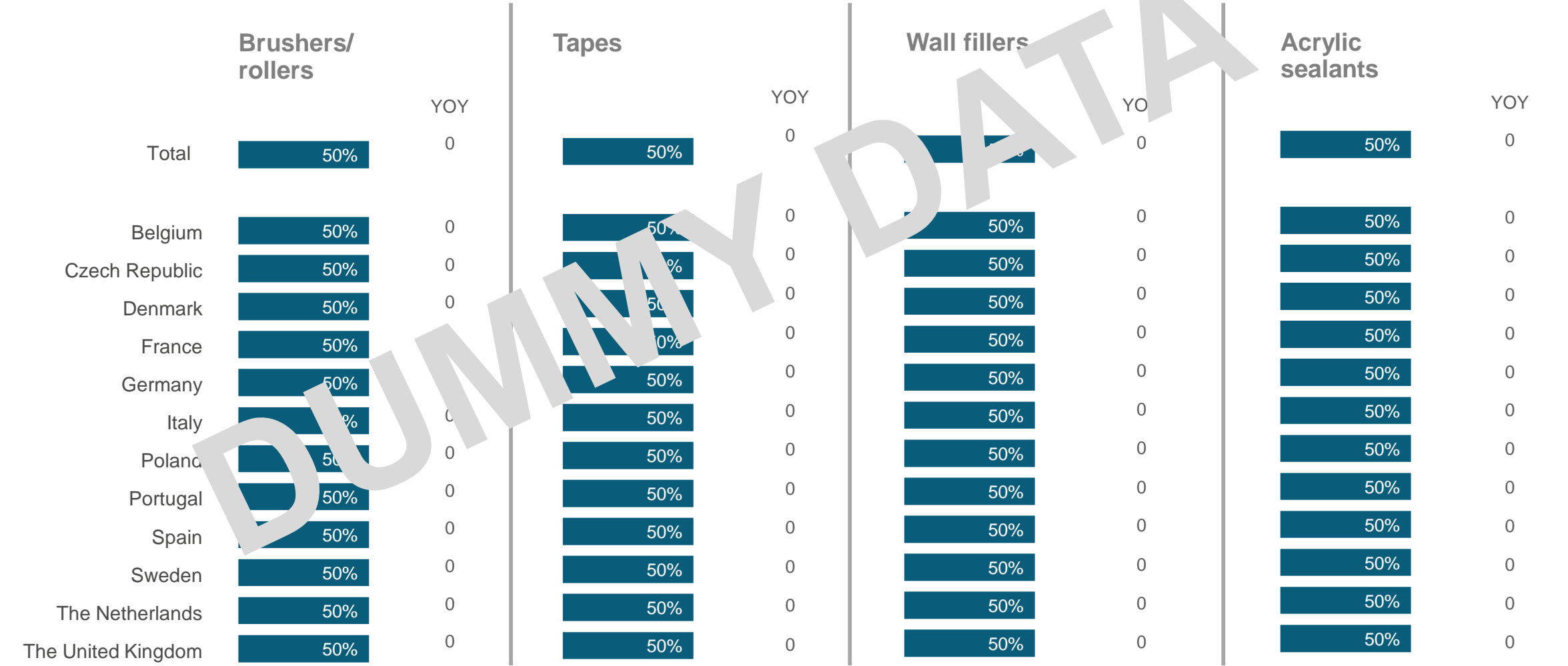




...

Purchase of consumables

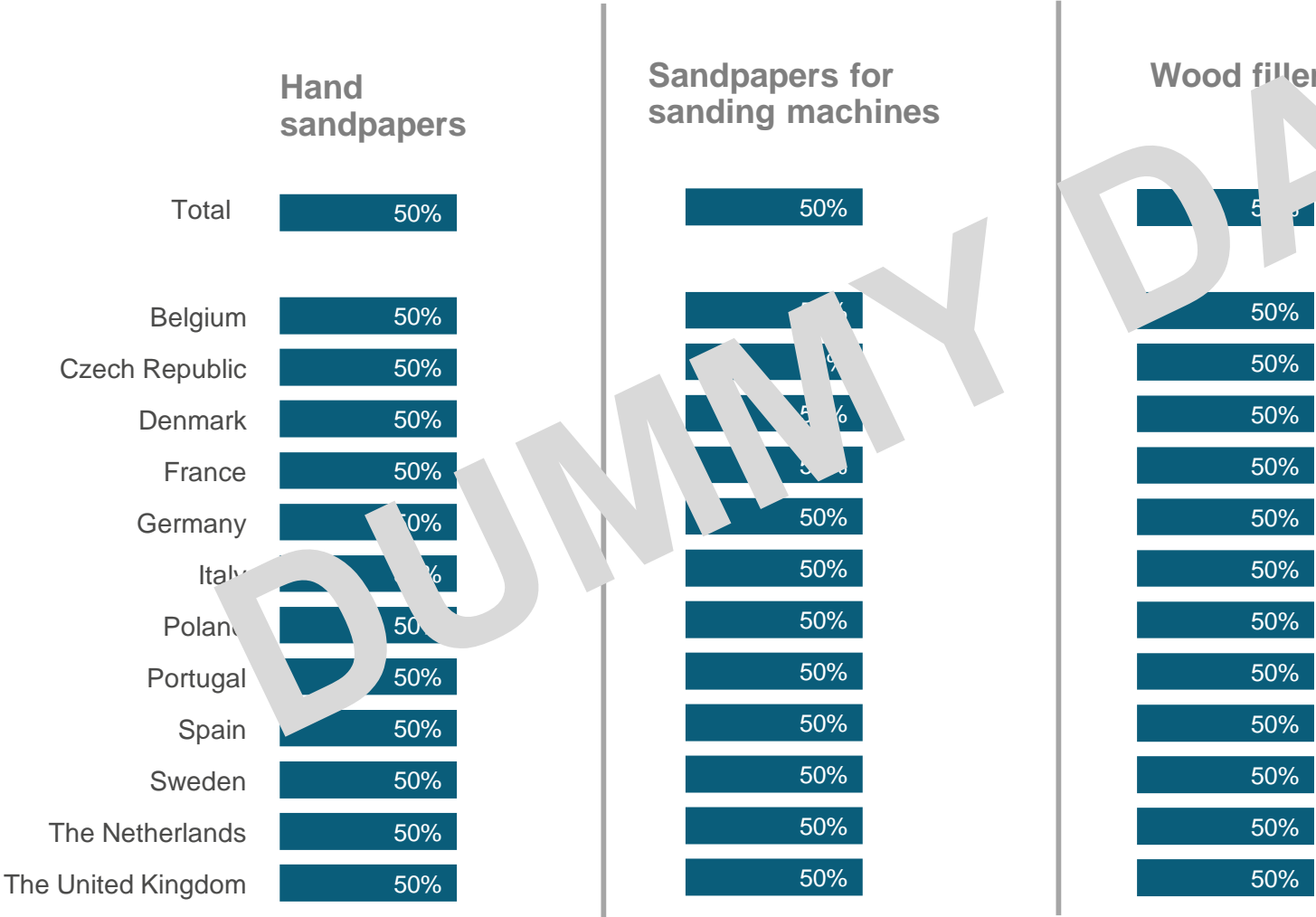
Question: Can you indicate whether you have purchased any of the following consumable products in the past 12 months?  
% that bought this product in the past 12 months



...

**Purchase of consumables**

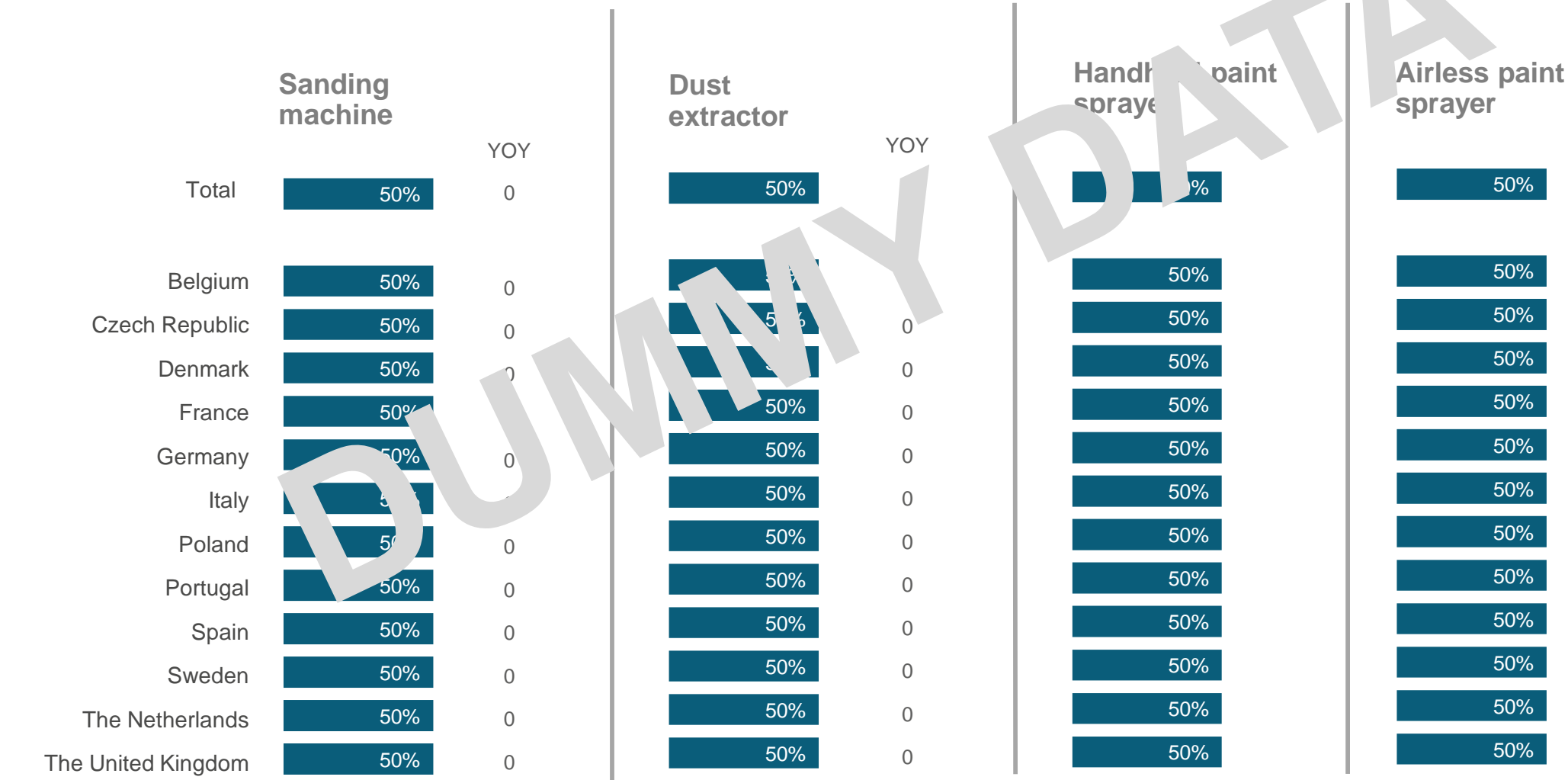
Question: Can you indicate whether you have purchased any of the following consumable products in the past 12 months?  
*% that bought this product in the past 12 months*



...

Purchase of power tools

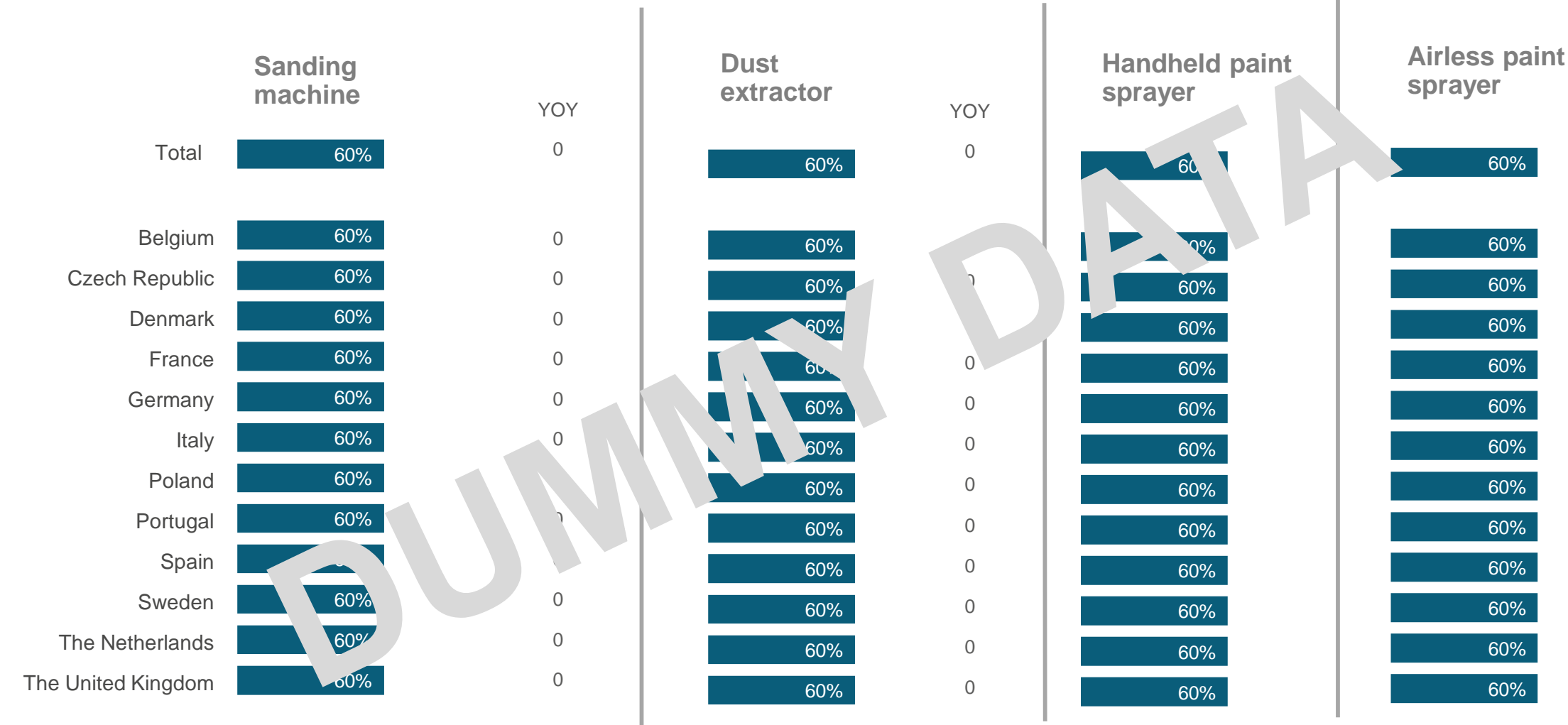
Question: How long ago did you purchase the following power tools?  
% that bought this product in the past 12 months



...

Purchase of power tools

Question: How long ago did you purchase the following **power tools**?  
% that bought this product in the past 4 years

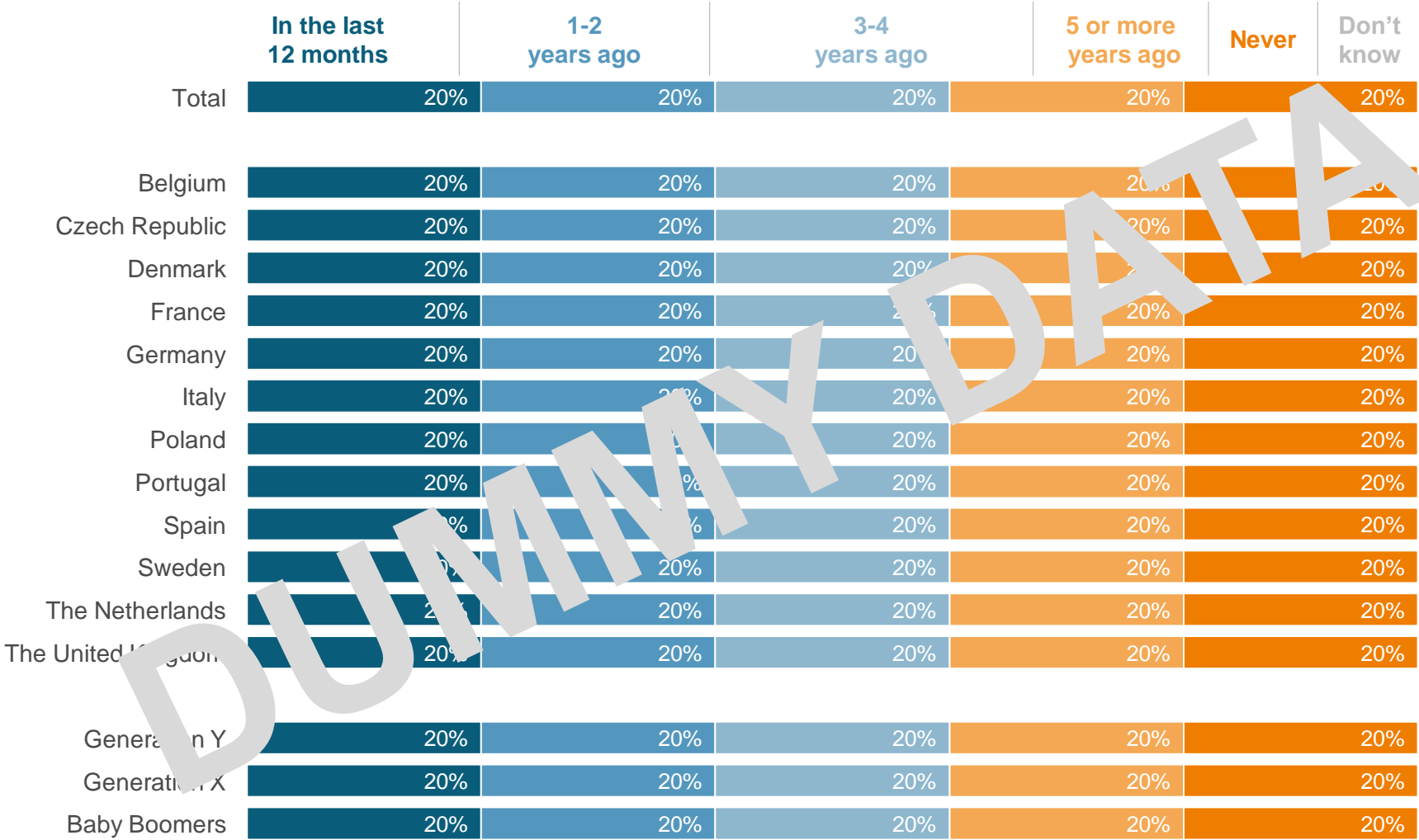




...

**Purchase of power tools – Sanding machine**

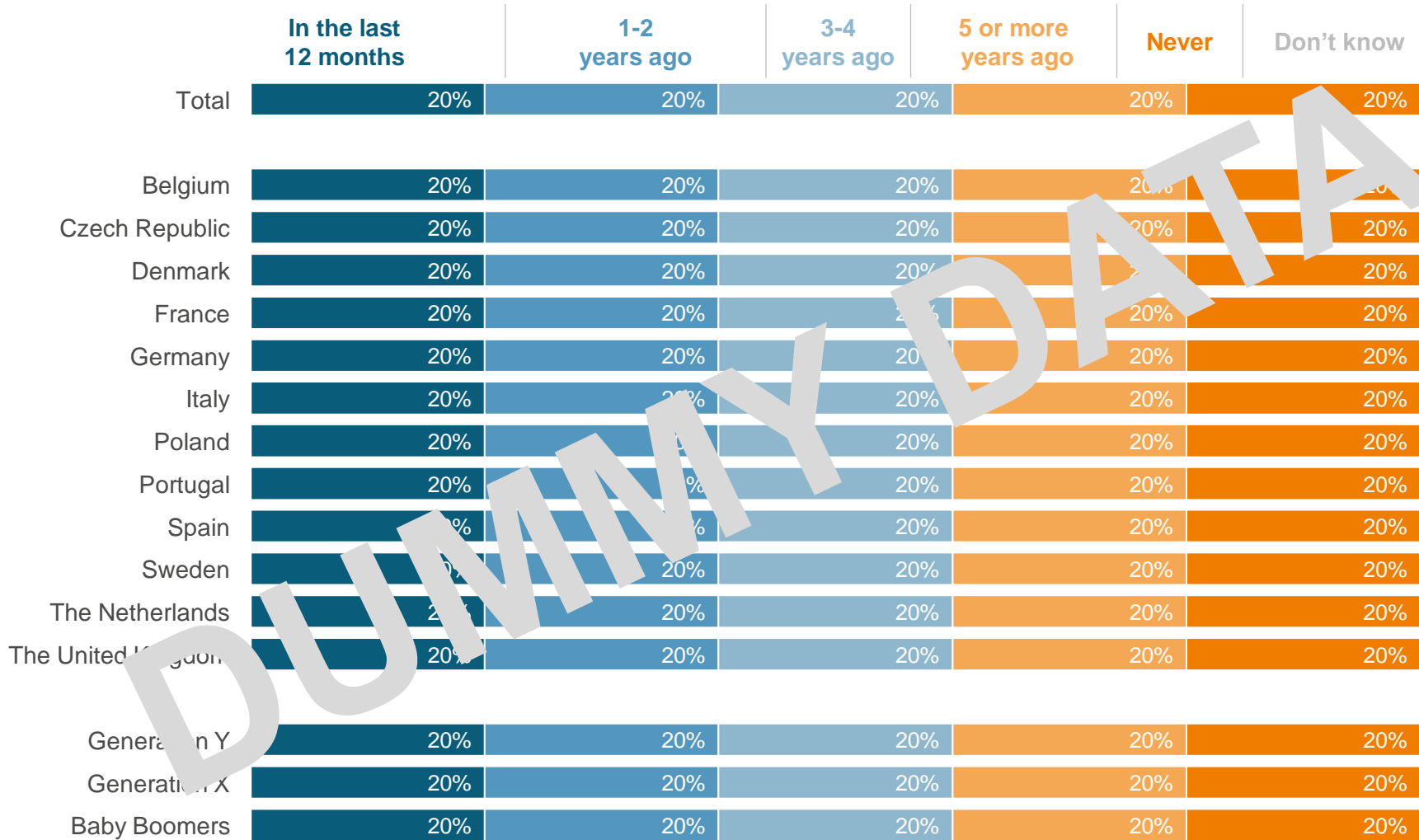
Question: How long ago did you purchase a sanding machine?



...

**Purchase of power tools – Dust extractor**

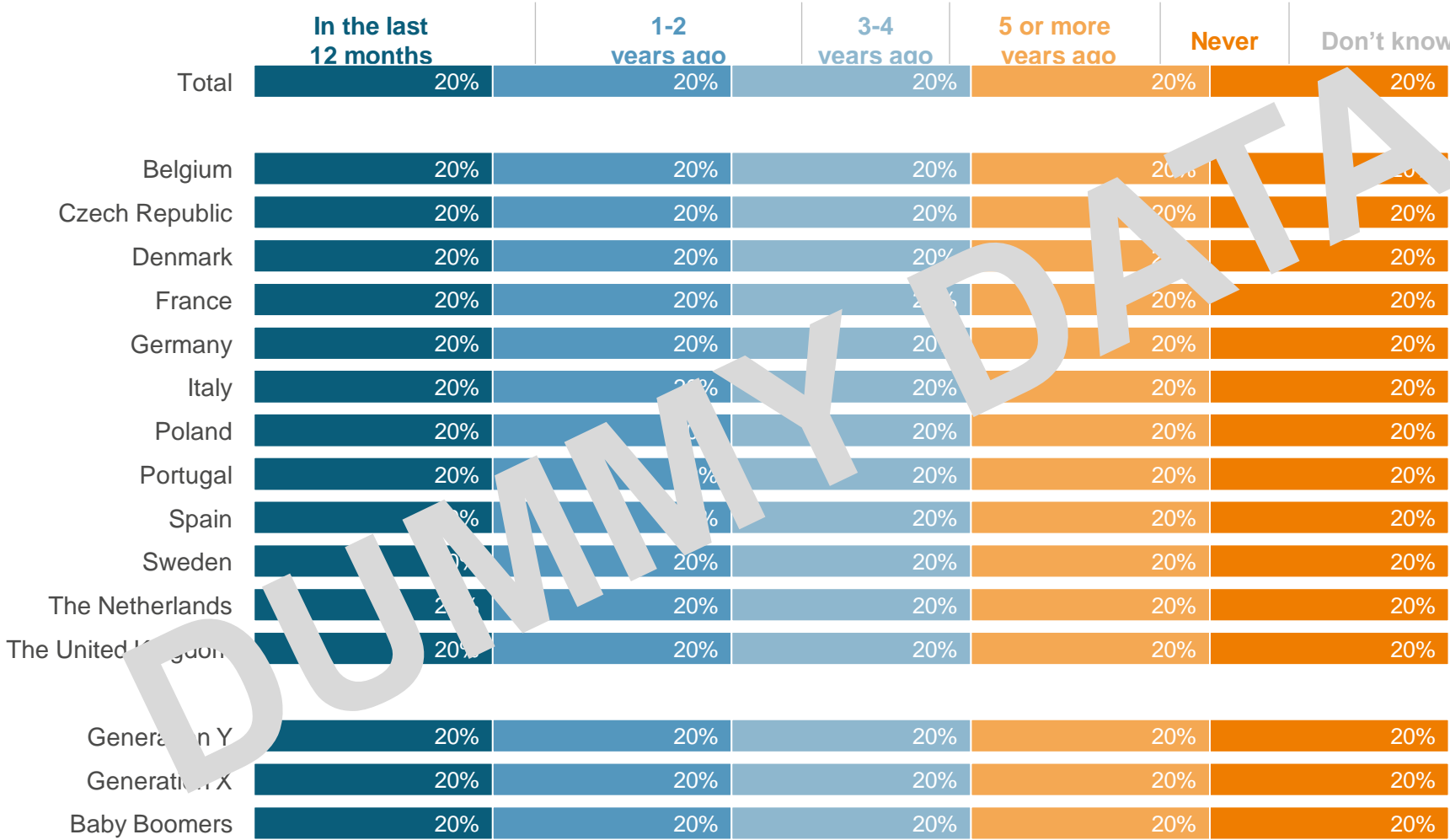
Question: How long ago did you purchase a dust extractor?



...

**Purchase of power tools – Handheld paint sprayer**

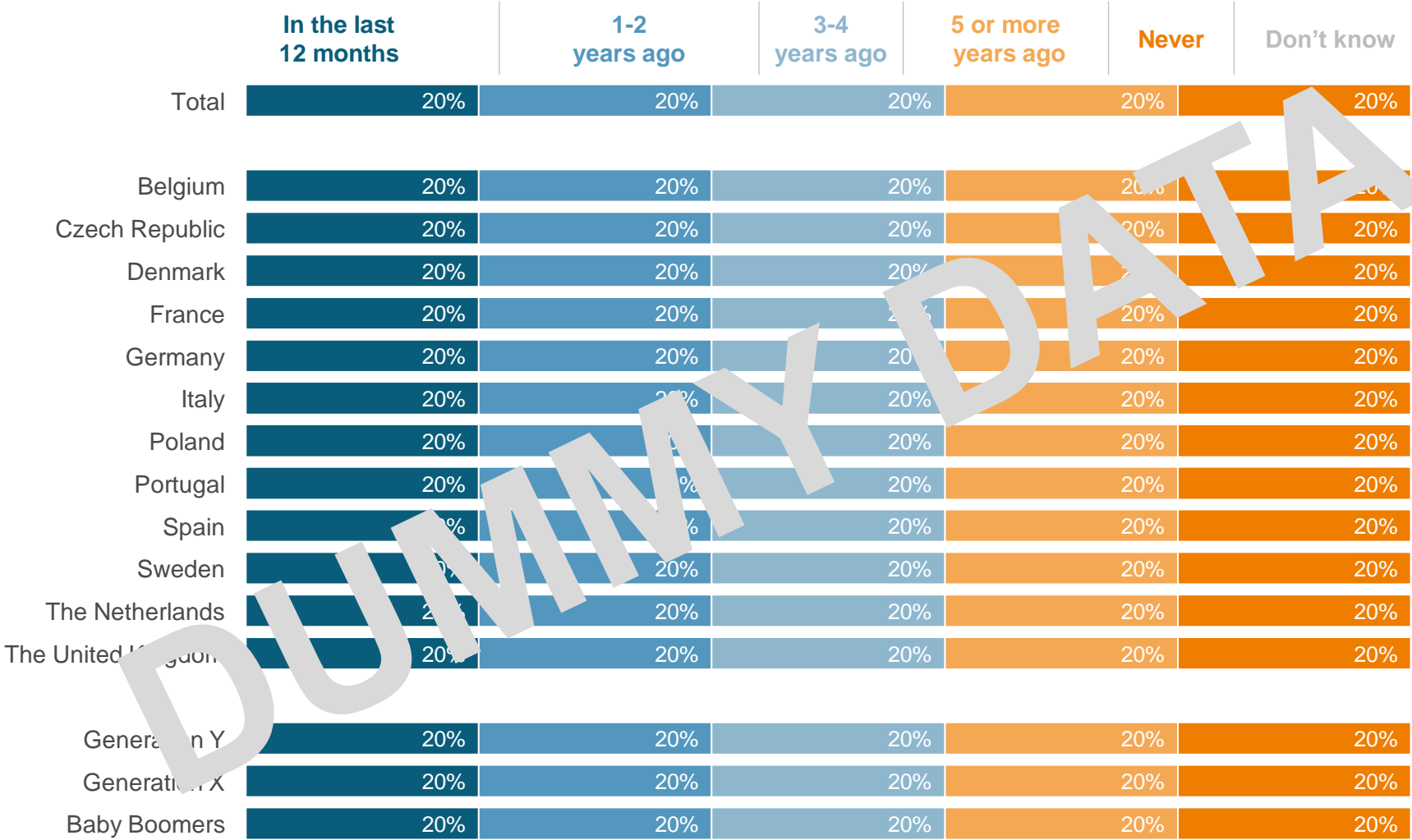
Question: How long ago did you purchase a handheld paint sprayer?



...

**Purchase of power tools – Airless paint sprayer**

Question: How long ago did you purchase an airless paint sprayer?



# Top 10 mentioned sustainable brands – Paint products

Question: When thinking about sustainability and advanced sustainable products, which manufacturers/brands of **paint products** come first to your mind?



BE N=49	FR N=67	DE N=66	IT N=46	NL N=51	PL N=67	ES N=49	UK N=51	DK* N=51	SE N=50	CZ N=43	PT* N=42
Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)
Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)
Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)
Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)
Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)
Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)
Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)
Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)
Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)
Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)

Base, Paint products sample: N=635

\* In some countries we do not have 'top 10' brands listed since many very small % of spontaneous answers went under 'Other, namely' during data processing/re-coding.

# Top 10 mentioned sustainable brands – Consumables

Question: When thinking about sustainability and advanced sustainable products, which manufacturers/brands of **consumable products** come first to your mind?



BE N=51	FR N=66	DE N=50	IT N=50	NL N=50	PL N=66	ES N=49	UK N=51	DK N=50	SE N=50	CZ N=41	PT N=42
Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)
Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)
Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)
Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)
Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)
Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)
Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)
Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)
Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)
Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)

Base, Consumables sample: N=630

NOTE: Consumable product group description included tapes, brushes and rollers, sealants, wall or wood filler, hand or machine sandpapers. Due to painters' perception of a wide product range within this category, a wide range of brands from these categories are mentioned, and on some occasions big paint manufacturers are also spontaneously mentioned.

# Top 10 mentioned sustainable brands – Power tools

Question: When thinking about sustainability and advanced sustainable products, which manufacturers/brands of **power tools** come first to your mind?



BE N=43	FR N=67	DE N=65	IT N=53	NL* N=49	PL N=66	ES N=50	UK N=49	DK N=50	SE N=51	CZ N=42	PT N=41
Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)	Brand 1 (%)
Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)	Brand 2 (%)
Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)	Brand 3 (%)
Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)	Brand 4 (%)
Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)	Brand 5 (%)
Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)	Brand 6 (%)
Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)	Brand 7 (%)
Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)	Brand 8 (%)
Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)	Brand 9 (%)
Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)	Brand 10 (%)

Base, Power tools sample: N=633

\* In some countries we do not have 'top 10' brands listed since many very small % of spontaneous answers went under 'Other, namely' during data processing/re-coding.

# USP Marketing Consultancy

© 04 October 2024, USP Marketing Consultancy B.V.

The information in this publication is strictly confidential and all relevant copyrights, database rights and other (intellectual) property rights are explicitly reserved. No part of this publication may be reproduced and/ or published without the prior written permission of USP Marketing Consultancy B.V.