



Painter Insight Monitor 2026:

Understanding how painters adapt and shape your market

Brochure

USP Marketing Consultancy

Europe's professional painting market is evolving — and painters are at its core

The European painting industry is clinging to its traditional structure even as forces quietly reshape it from within.

Manufacturers must navigate:

- A two-speed industry with diverging workforce and demographic trajectories by country
- Labour shortages are cutting across all segments and markets without exception
- A pro-innovation profession that draws a hard line at anything threatening craft identity
- Growing cost and efficiency pressure are redefining how products and brands get chosen
- A fragmented brand landscape where loyalty logic varies sharply by product category
- An increasingly fragmented landscape of media and information sources

This market shift is playing out at the level of the individual painter



Painters are the main decision makers for products, brands and solutions

Specification does not guarantee application.

Final choices are increasingly made under time, cost, and convenience pressure.

Painter behaviour is shifting — but how far?

- Adjusting business outlook and workload expectations in a tightening labour market?
- Turning to new media channels and peer networks over traditional manufacturer communications?
- Adopting AI and digital tools differently across generations?

Influence is shifting beyond direct brand control.

**The key question is no longer “what do painters think?”,
but “how do they actually decide TODAY?”**

Painter Insight Monitor (PIM)

Understanding how Europe's painters operate and what their brand preferences are



SCOPE



- 12 European markets
- 1900 painter interviews (CATI)
- One annual data collection wave
- Continuous trend tracking



TOPICS IN FOCUS

2026: Media orientation and generational differences

Key trend tracking (every year):

- Brand funnels
- Painter's profile
- Business development
- Product usage



DELIVERABLES

- Strategic report with executive summary & advisory notes (November)
- Internal presentation and discussion session
- Interactive dashboard (in development)



INVESTMENT

- Single report 8 countries: **€ 11.000** (1 product category)
- Single report 12 countries: **€ 16.700** (1 product category)



Added Value: PIM Brand Scan

Who really wins in your category?

What you get:

- Brand funnel: awareness → usage → the most used brand
- Spontaneous brand associations: digitalization | innovation | sustainability
- Insights at **product category level**

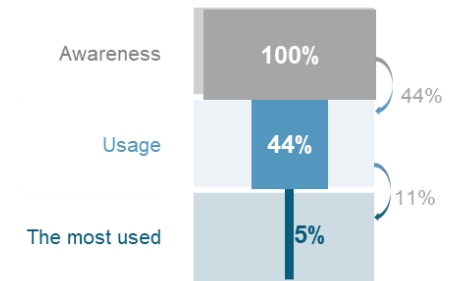
Why it matters:

- ✓ See where you **win (or lose) vs. competitors**
- ✓ Support **brand, product, and channel decisions**

Product categories included in the brand scan:

- ✓ Interior Wall Paints
- ✓ Exterior Wall Paints
- ✓ Lacquers / Wood Care
- ✓ Acrylic Sealants
- ✓ Airless Paint Sprayers (new)*
- ✓ Tapes
- ✓ Brushes & Rollers
- ✓ Sanding Machines (bi-annually rotating with Dust Extractors)

*The wall filler product category was not in the scope of the 2025 brand funnels. Instead, the airless paint sprayer product category was added. Wall filler and paint sprayer categories can be rotated based on the clients' requests prior to the preparations for the next edition.



Brand Scan is always available as an additional PIM module and can be purchased per product category

Contact your PIM team to **pre-register interest and prioritize product categories**

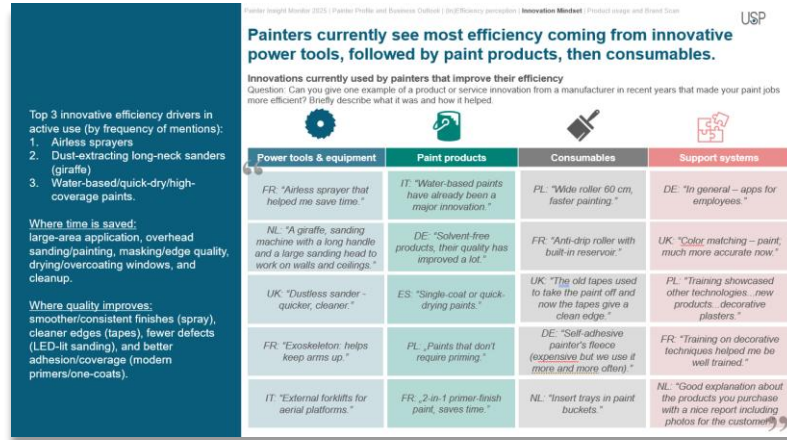
Why manufacturers choose PIM

Stronger painter insight for better commercial decisions

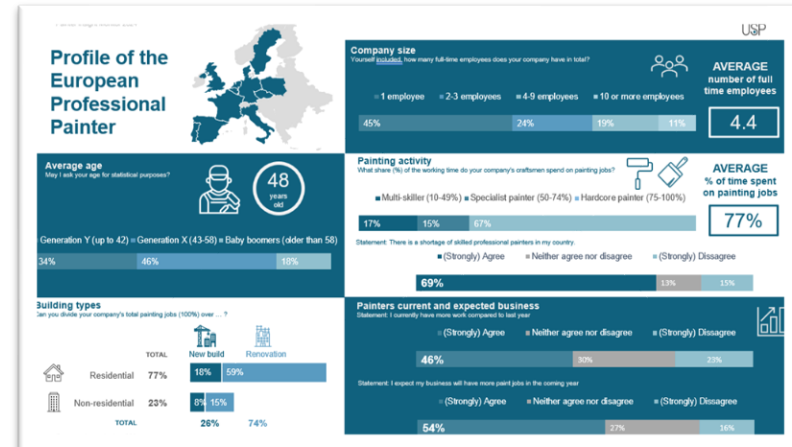
- ✓ Understand how **painters actually make decisions**
- ✓ Track **emerging trends** shaping your 2026–2028 strategy
- ✓ Anticipate **substitution risk and shifting brand dynamics**
- ✓ Strengthen **product, channel and communication decisions**
- ✓ Use **strategic reporting** that is easier to share internally

A sneak peek into previous PIM reports....

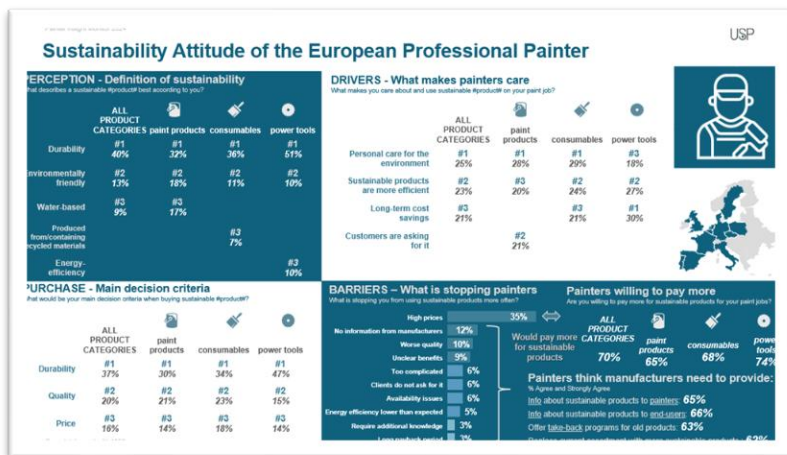
Efficiency & Innovation:



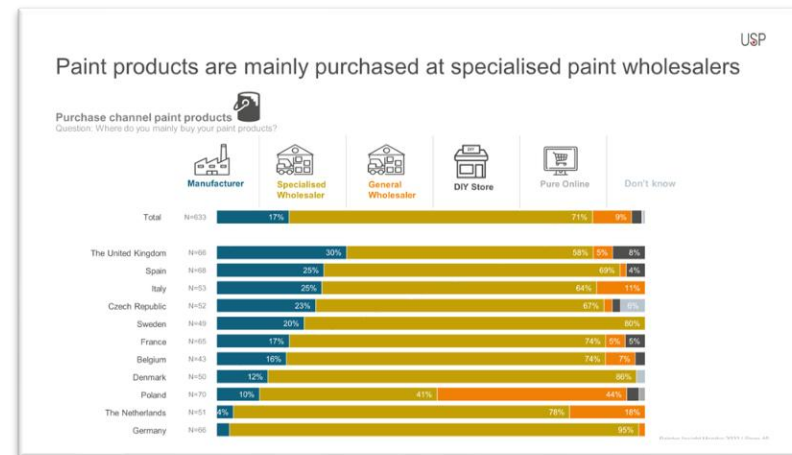
Painters Profile:



Sustainability:



Purchase Behaviour:



Your trusted PIM contacts:

Let's explore how PIM can support your business



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Connect the full construction decision chain

USP's European Construction Decision Intelligence Platform



- **European Architectural Barometer**

- **Contractor Monitor**

- **Handymen Insight monitor**

- **Painter Insight monitor**

- **European Mechanical Installation Monitor**

- **European Electrical Installation Monitor**

<Channel dynamics captured through installer, contractor and homeowners' perspectives>

- **European Home Improvement Monitor**

Client Testimonials

What clients value in our market monitors



Justyna Gudowska-Pohling
AC EMEA Customer Insight Manager

USP delivered the company good, useful business recommendations and insights, which have accelerated business growth.



Leo van der Blom
Insights Manager Prof EMEA

These reports not only help us track changes within our target groups, aiding informed decision-making, but also serve as input and benchmarks for our ongoing research.



Dalia Gonciauskaite
Marketing Manager Architectural

It's great that the European painters insight monitor reports are focusing on key topics that are highly relevant for our business.



Caroline Roque
EMEA Consumer and Market Insights Manager

The USP team has very strong expertise in the construction and home improvement markets. We are using their detailed monitor reports very extensively.



DEUTSCHE
AMPHIBOLIN-WERKE
VON ROBERT MURJAHN

Marina Wall
Manager Customer Research & Insights

USP has extensive international construction industry experience, and their painters monitor provides valuable insights, supporting our marketers in their marketing strategies.



Miryam Salvador
Global Channel Director

Their specialized insights into construction and installation markets enable us to make informed go-to-market decisions based on factual data. Their customer-centric approach helps us put customer needs at the centre of our decisions.



Trusted by industry leaders

Supporting growth across construction, installation and home improvement

Construction

Installation & Home Improvement

About USP Marketing Consultancy

Trusted insights for over 30 years



30+ years of international market research and consultancy experience



Specialised in construction, installation, DIY and real estate



Active in **40+ countries** annually



Focused on **trends, market developments and actionable insights**



A strategic partner, not just a data provider

At USP, we deliver the insights you can truly build on.

Head office



The Netherlands – Rotterdam

Branche office



Croatia – Zagreb

Subsidiary



Germany – Düsseldorf



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