



Report impression European Handyman Insights Monitor

France, Germany, Italy, Netherlands, Poland, Spain and United Kingdom

2024

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Management summary

Background research

Buying behaviour

Private label vs. branded products

Brand funnel



...Conclusion



Handymen are becoming xx, but in some countries, handymen also face xx: xx projects and xx purchasing power

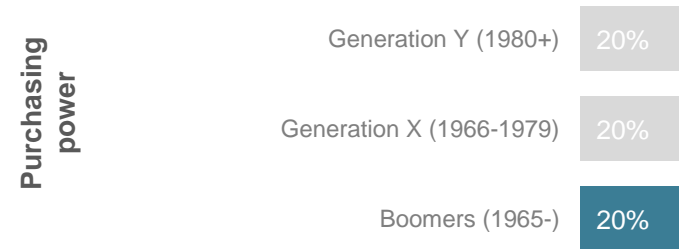
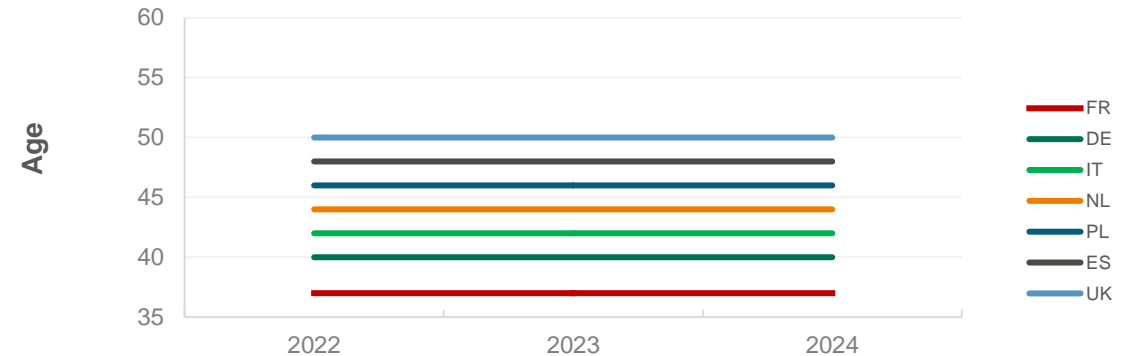
The average age of handymen has xx over the past few years (from xx in 2022 to xx in 2024). It seems that xx. We also see that in those countries where the construction sector is struggling (especially xx and xx), the order book has decreased compared to last year.

xx handymen have xx purchasing power than xx handymen

The xx generation of handymen has xx experience and has therefore xx. So, they are more inclined to work for xx. As an effect of this, they also xx.

Handymen can be seen as one target group; they themselves make a distinction between being a specialist or a multiskiller

Even within the definition that USP uses for a handyman (max 4 employees and minimum of 3 different activities), handymen make a distinction themselves: xx% see themselves as a multiskiller and xx% state they are a specialist. This distinction is xx. They can be a specialist for xx, xx jobs or xx jobs. These jobs/ activities can be clustered into 5 different groups (see table right). When looking in detail, the specialists are mostly found in the xxx group and in the xxx group.



Activities clustered	Description
Specialist roof	Roof windows, dormers, skylight, PV/ solar
Exterior	Insulation, façade/ exterior cladding, roofing, daylight solution
Installation	HVAC, plumbing/ sanitary, electrical work
Finishing	Flooring, tiling, painting
Walls	Drywalling, brick laying/ masonry, building extensions

...Conclusion

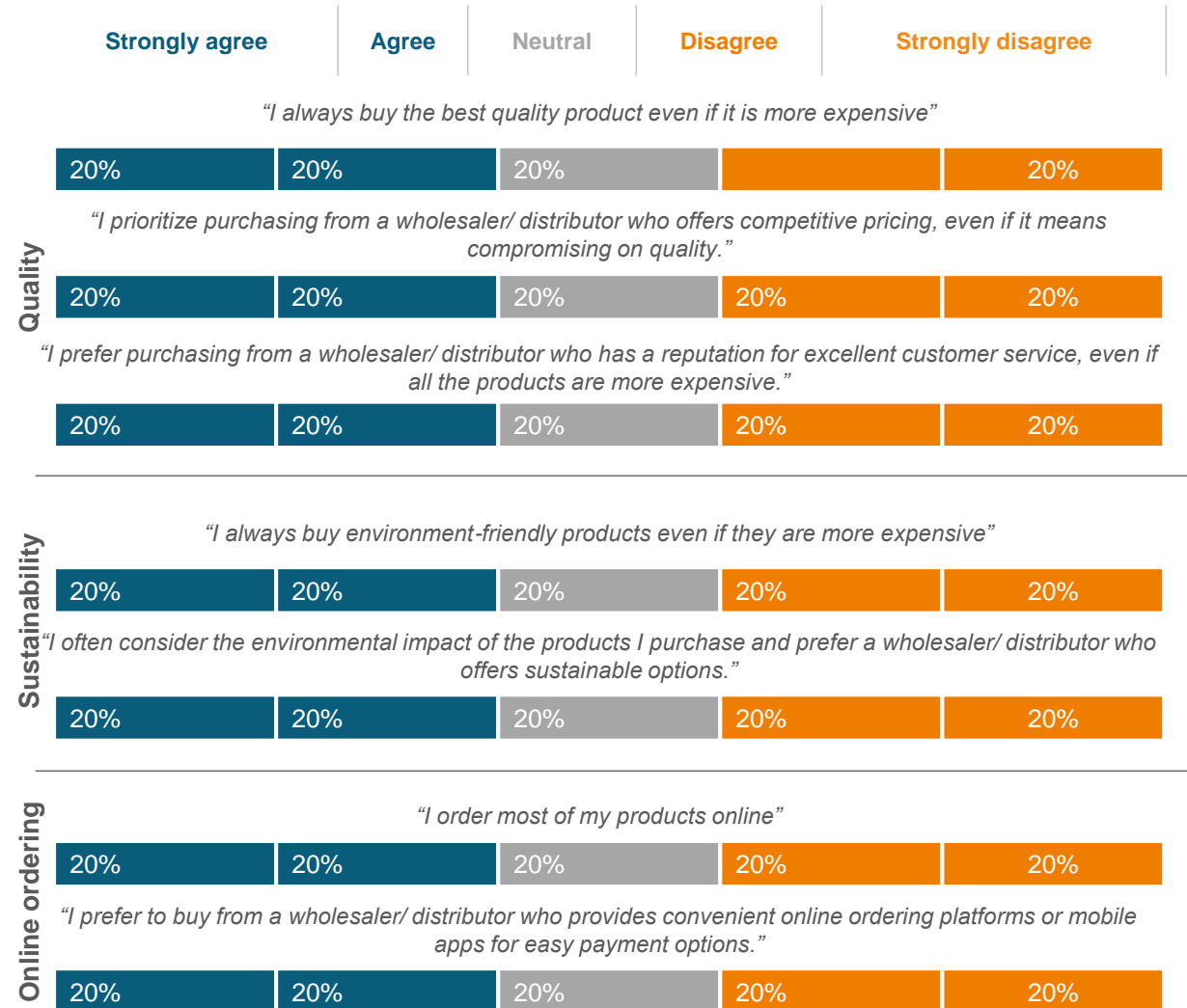
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Handymen do not like to compromise on xx, but are more indifferent towards xx and are xx

Based on the statements regarding their buying behaviour we can conclude that handymen would prefer **xx** and **xx**, rather than going for **xx** and compromising on **xx**.

When looking at the statements that focus on **sustainability**, we see that the handymen have **xx** on that topic. Some **xx**. They buy environ **xx**. Others do **xx**. The most environmentally focussed handymen can be found in **xx** and **xx**. We also see that the **xx** care more for the environment than other **xx**.

Ordering most of the products **online** is **xx** among the handymen. We do see, however, that in the **xx** and in **xx**, the countries where **xx**. We see that online ordering will become **xx** in the (near) future, since the share of handymen that **xx**. Especially regarding the last statement, we see that **xx** is more in favour of those solutions than the **xx**.



...Conclusion



The share of private labels is xx%, although handymen are more private-label-oriented for some product groups. Next to that, they are also more loyal to the xx than to the xx

Most handymen prefer a xxx, and the expectations are that this will xx. There are multiple reasons for that; e.g. xx, xx. We also see that when a product of their favourite brand is not available, handymen first look at xx, then switch to xx, and ultimately choose xx.

	% private label usage		Loyal to wholesale Loyal to brand		
	% present	saldo usage future more - less	Switch to private label	Switch to another brand	Look online, another wholesaler, DIY store
Interior wall paints	20%	-20%	25%	50%	75%
Power tools and accessories	20%	-20%	25%	50%	75%
Lacquers	20%	-20%	25%	50%	75%
Façade products	20%	-20%	25%	50%	75%
Insulation materials	20%	-20%	25%	50%	75%
Floor covering	20%	-20%	25%	50%	75%
Masking tapes	20%	-20%	25%	50%	75%
Adhesives	20%	-20%	25%	50%	75%
Sealants	20%	-20%	25%	50%	75%
Switches and sockets	20%	-20%	25%	50%	75%

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Key insights

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Background research

Goal

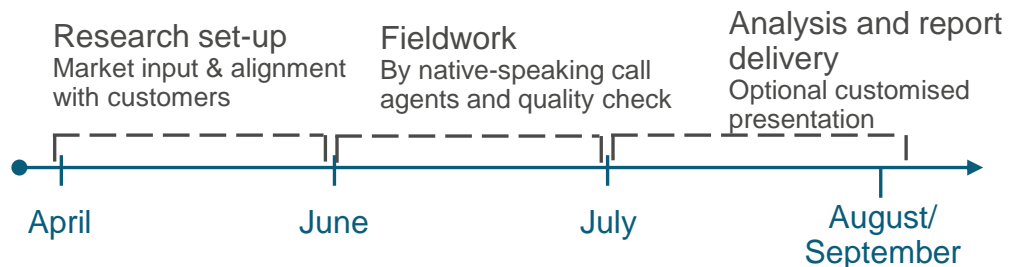
The European Handyman Monitor provides key insights that help manufacturers and merchants to understand the business and behaviour of European handymen in the European building construction sector.

Methodology and target group

200 telephone interviews per year per country among professional handymen across 7 European countries.

Interviewed companies must have a **maximum of 4 full-time employees** (including the owner) and are involved in **at least 3 building construction activities**.

Timeline



Project team



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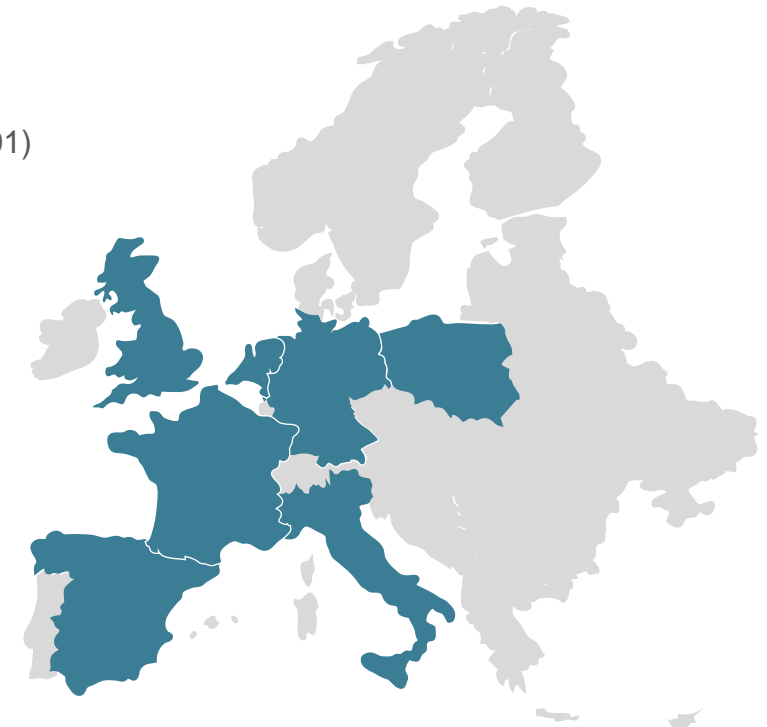


Henri Busker
Consultant
busker@usp-mc.nl

COUNTRY SCOPE

(number of interviews conducted)

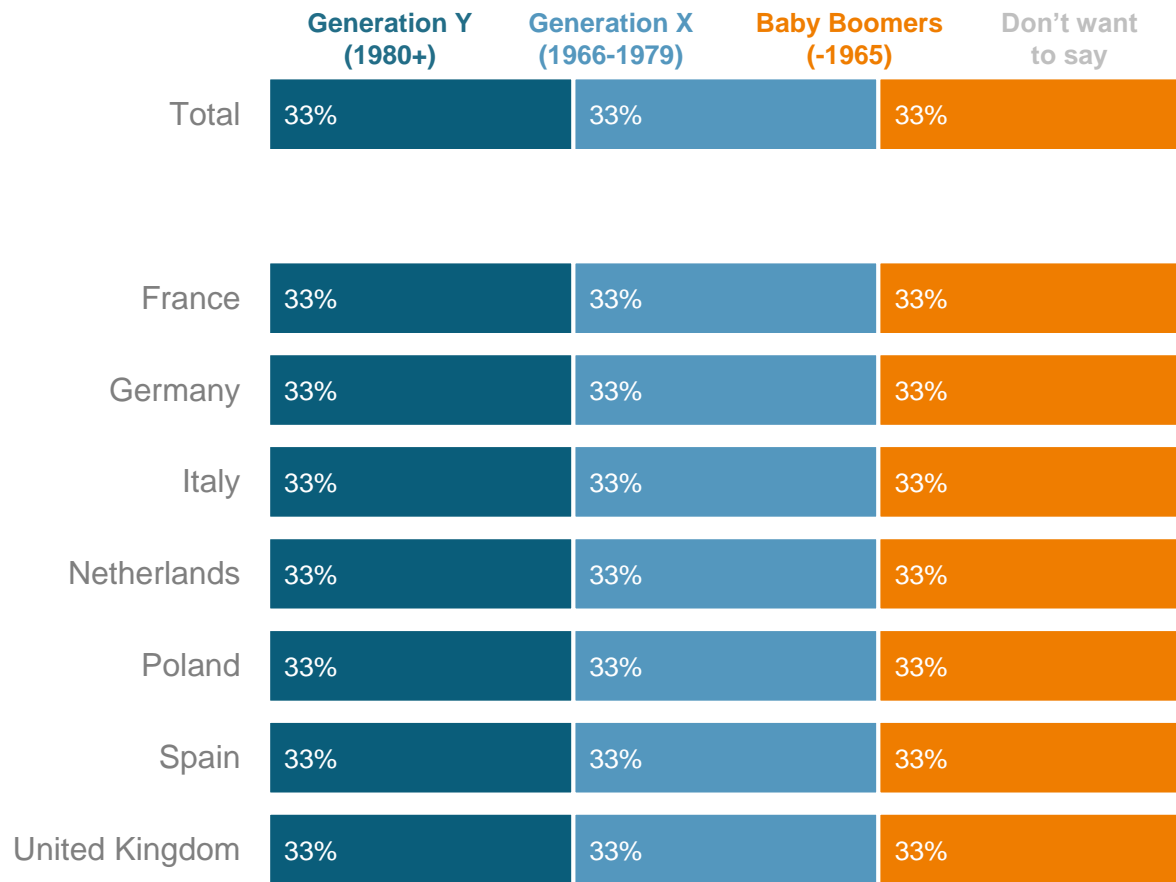
France (200)
Germany (200)
Italy (193)
The Netherlands (201)
Poland (192)
Spain (192)
UK (197)



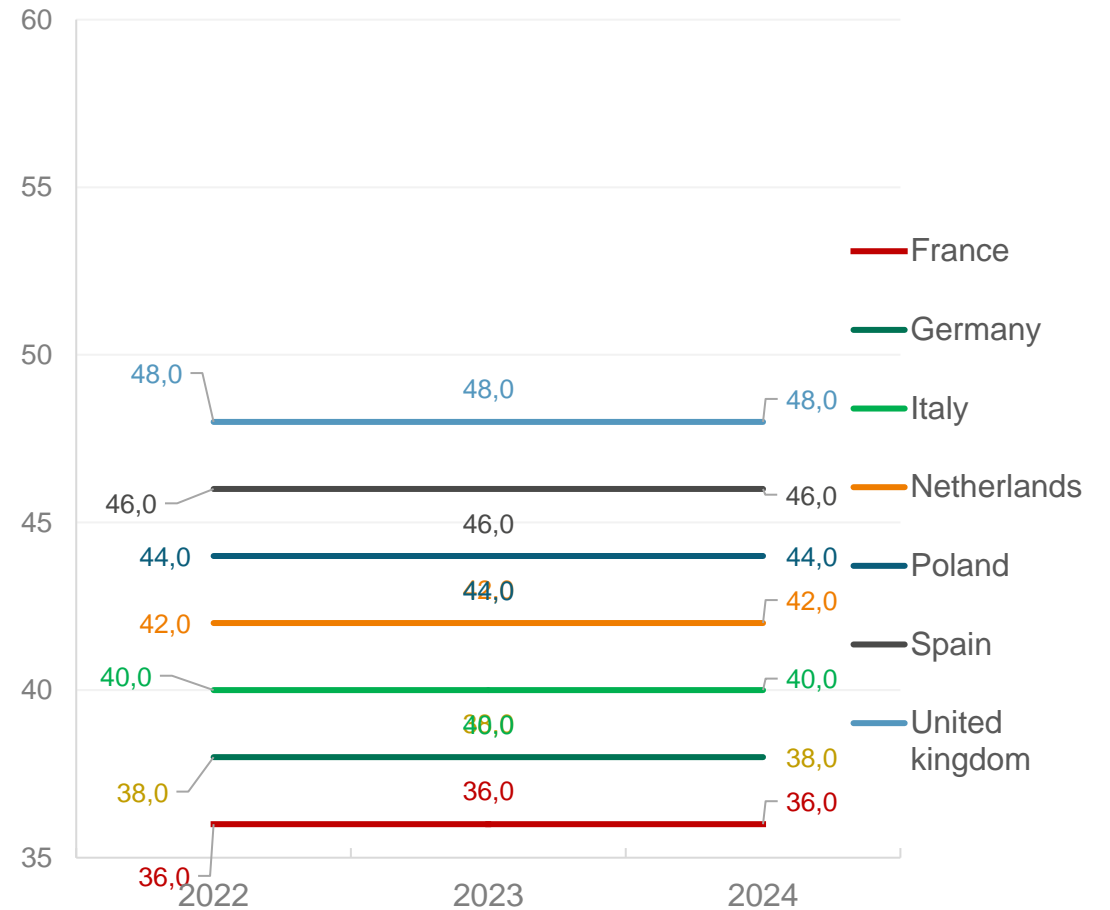
...Conclusion

Age distribution in 2024

May I please note your age? [spontaneous]



Age trend 2022-2023-2024



...Conclusion

Highest level of education

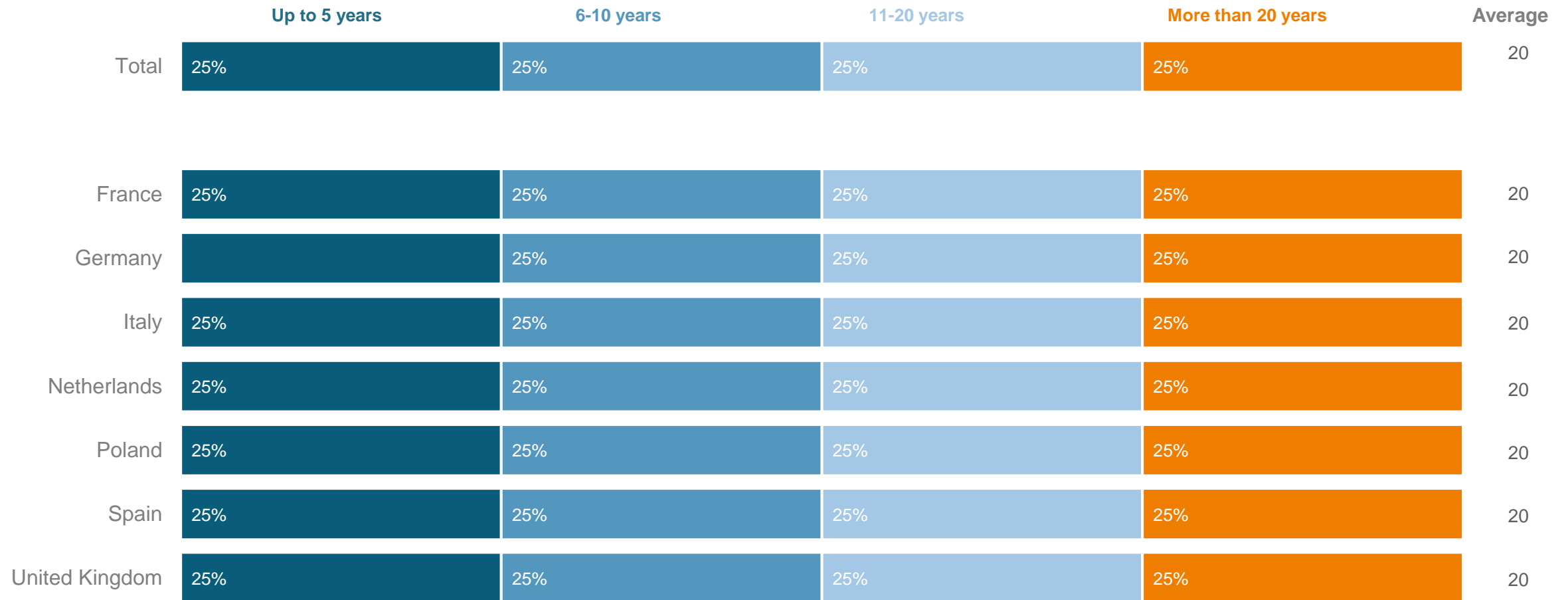
What is your highest level of completed education? *[spontaneous]*

Total		France	Germany	Italy	Netherlands	Poland	Spain	United Kingdom
No formal education	20%	20%	20%	20%	20%	20%	20%	20%
Some high school, no diploma	20%	20%	20%	20%	20%	20%	20%	20%
High school diploma or equivalent	20%	20%	20%	20%	20%	20%	20%	20%
Trade or vocational certificate in a specific field	20%	20%	20%	20%	20%	20%	20%	20%
Some college, no degree	20%	20%	20%	20%	20%	20%	20%	20%
Associate degree	20%	20%	20%	20%	20%	20%	20%	20%
Higher than associate degree	20%	20%	20%	20%	20%	20%	20%	20%
Prefer not to answer	20%	20%	20%	20%	20%	20%	20%	20%
Other, namely:	20%	20%	20%	20%	20%	20%	20%	20%
Don't know/ no opinion	20%	20%	20%	20%	20%	20%	20%	20%

...Conclusion

Years of experience in 2024

How many years of experience do you have as a professional handyman? *[spontaneous]*



...Conclusion

....

Other provided services

Do you consider yourself a specialist or a multiskiller, a generalist who offers a wide variety of services/ jobs? *[read out]*

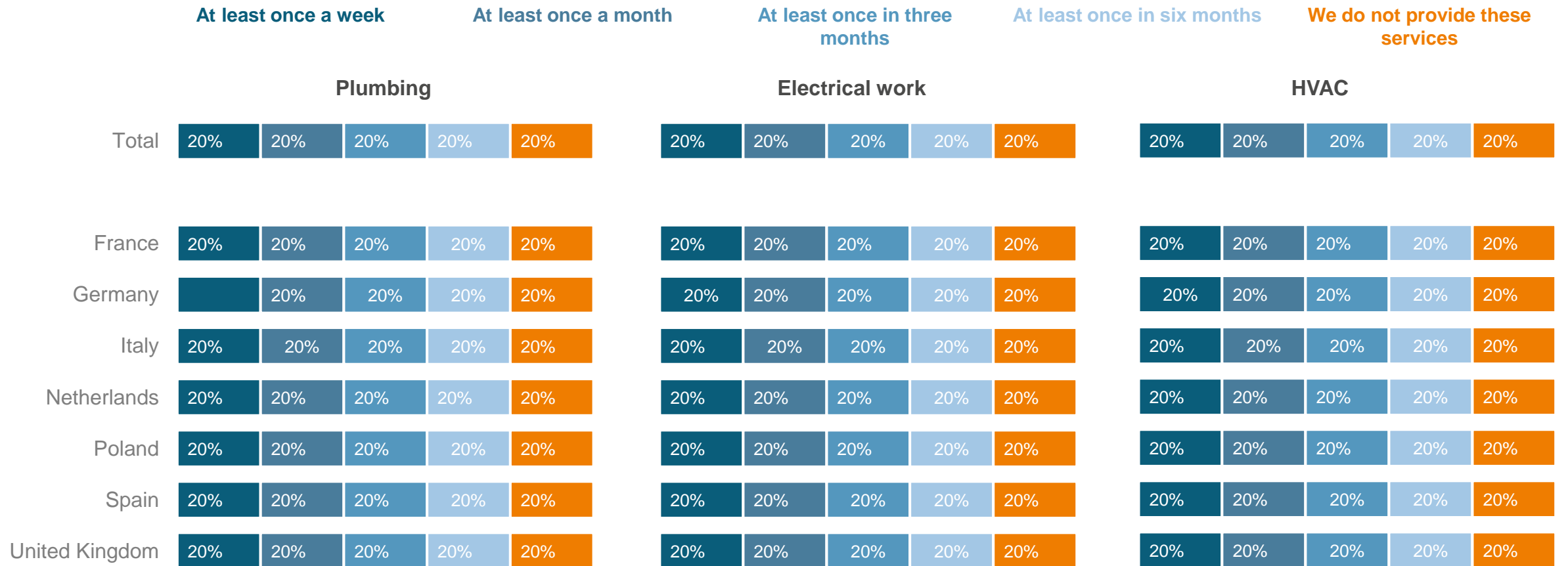
	Average			Total	Multi	Spec	Multiskiller	Specialist	Other, namely	Don't know
	10+	6 - 10	<5							
Total	33%	33%	33%	6,5	7,1	6,4	25%	25%	25%	25%
France	33%	33%	33%	5,6	5,7	-	25%	25%	25%	25%
Germany	33%	33%	33%	3,4	3,5	3,0	25%	25%	25%	25%
Italy	33%	33%	33%	7,9	8,8	6,4	25%	25%	25%	25%
Netherlands	33%	33%	33%	7,9	8,0	7,7	25%	25%	25%	25%
Poland	33%	33%	33%	5,9	5,6	6,2	25%	25%	25%	25%
Spain	33%	33%	33%	9,2	9,6	8,5	25%	25%	25%	25%
United Kingdom	33%	33%	33%	8,6	8,8	-	25%	25%	25%	25%

...Conclusion

HVAC installation is something that is less often provided as service

Provided services - Installation

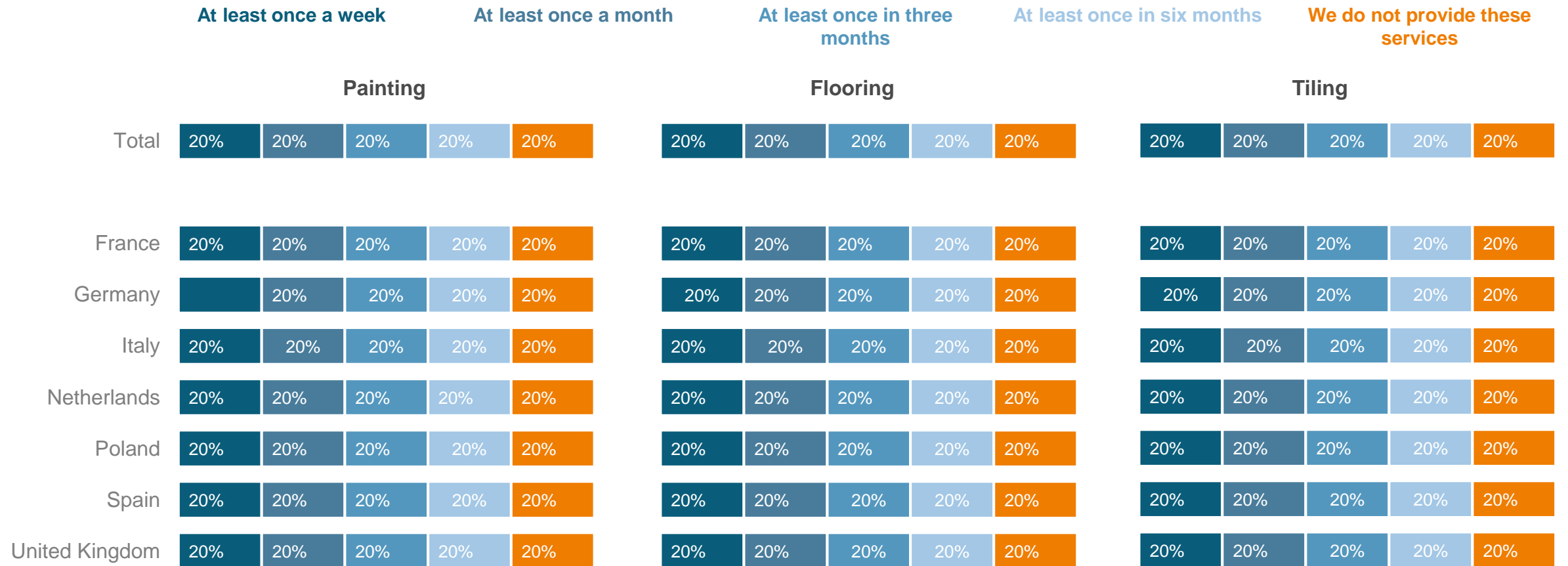
How often does your company do the following installation and repair jobs? *[read out]*



...Conclusion

Provided services - Finishing

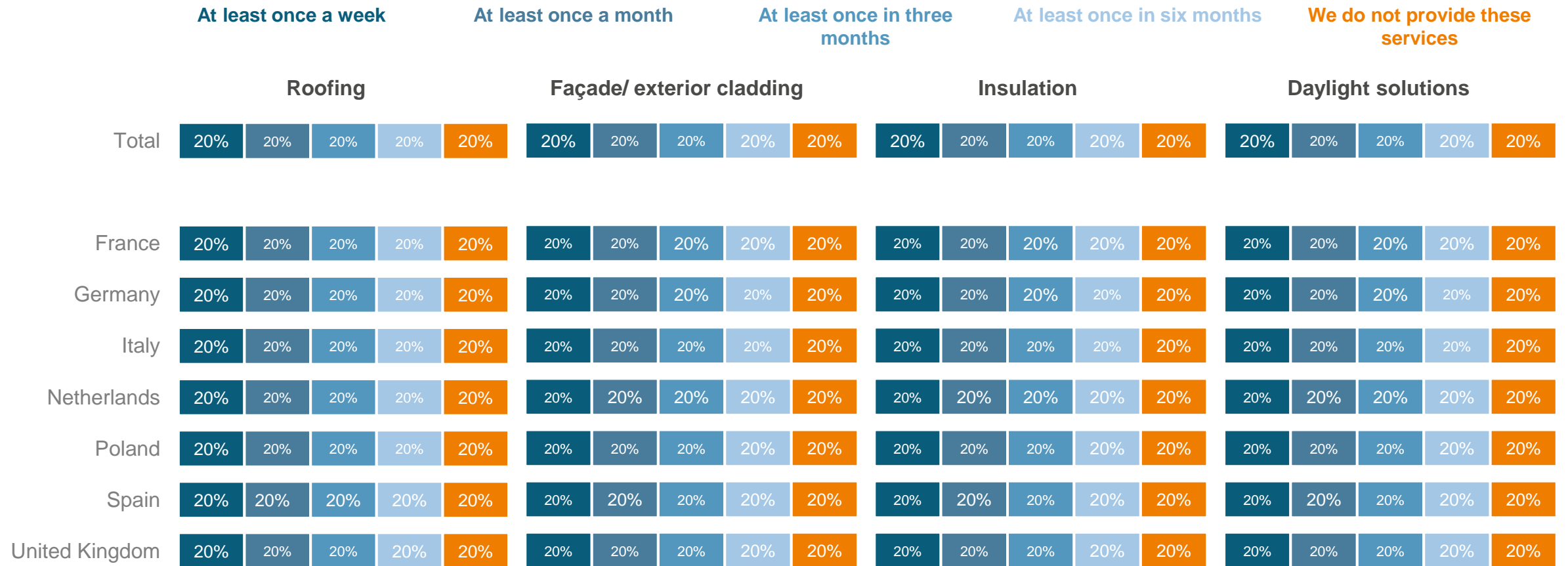
How often does your company do the following installation and repair jobs? *[read out]*



...Conclusion

Provided services - Building shell construction

How often does your company do the following installation and repair jobs? *[read out]*



...Conclusion

Other provided services

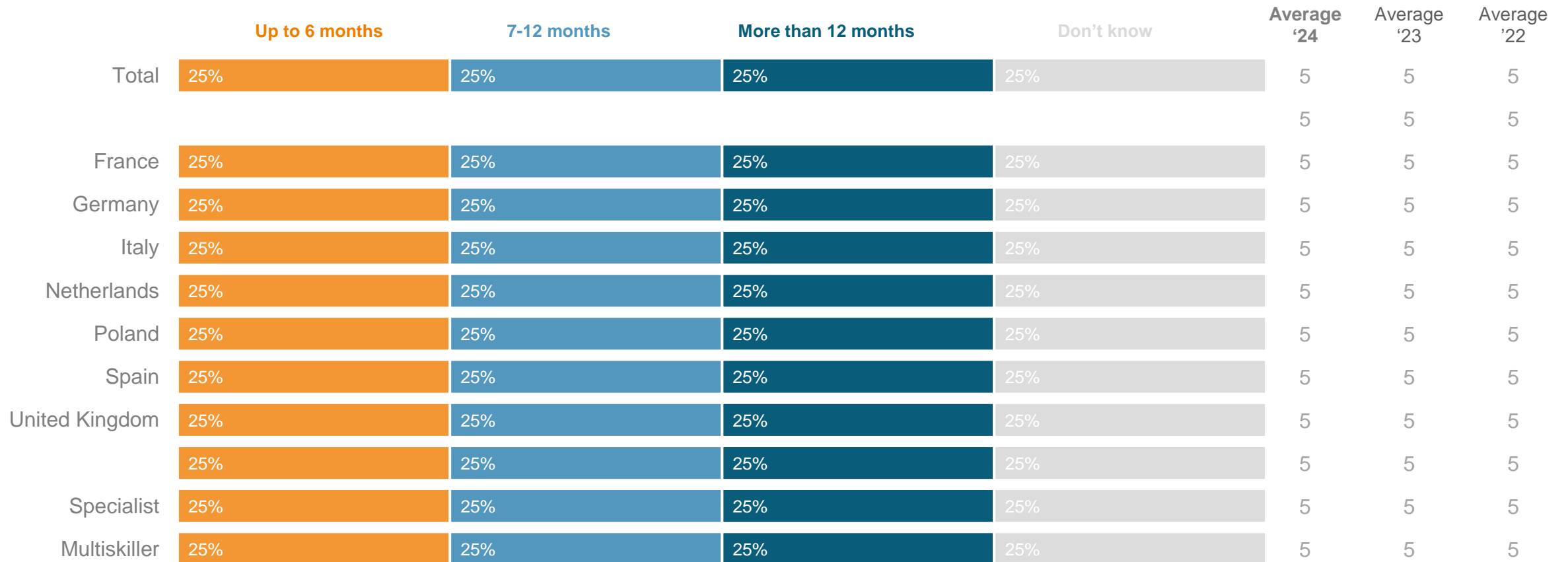
What other types of installation and repair jobs does your company do? [spontaneous]

Total		France	Germany	Italy	Netherlands	Poland	Spain	United Kingdom
	Carpentry/ joinery	20%	20%	20%	20%	20%	20%	20%
	Drywalling	20%	20%	20%	20%	20%	20%	20%
	Brick laying/ masonry	20%	20%	20%	20%	20%	20%	20%
	Sanitary (e.g. kitchen, bathroom)	20%	20%	20%	20%	20%	20%	20%
	Landscaping	20%	20%	20%	20%	20%	20%	20%
	Building extensions	20%	20%	20%	20%	20%	20%	20%
	Skylight solutions	20%	20%	20%	20%	20%	20%	20%
	Roof window solutions	20%	20%	20%	20%	20%	20%	20%
	Dormer solutions	20%	20%	20%	20%	20%	20%	20%
	PV/ solar panel	20%	20%	20%	20%	20%	20%	20%
	Other	20%	20%	20%	20%	20%	20%	20%
	Don't know	20%	20%	20%	20%	20%	20%	20%

...Conclusion

Size of portfolio in months

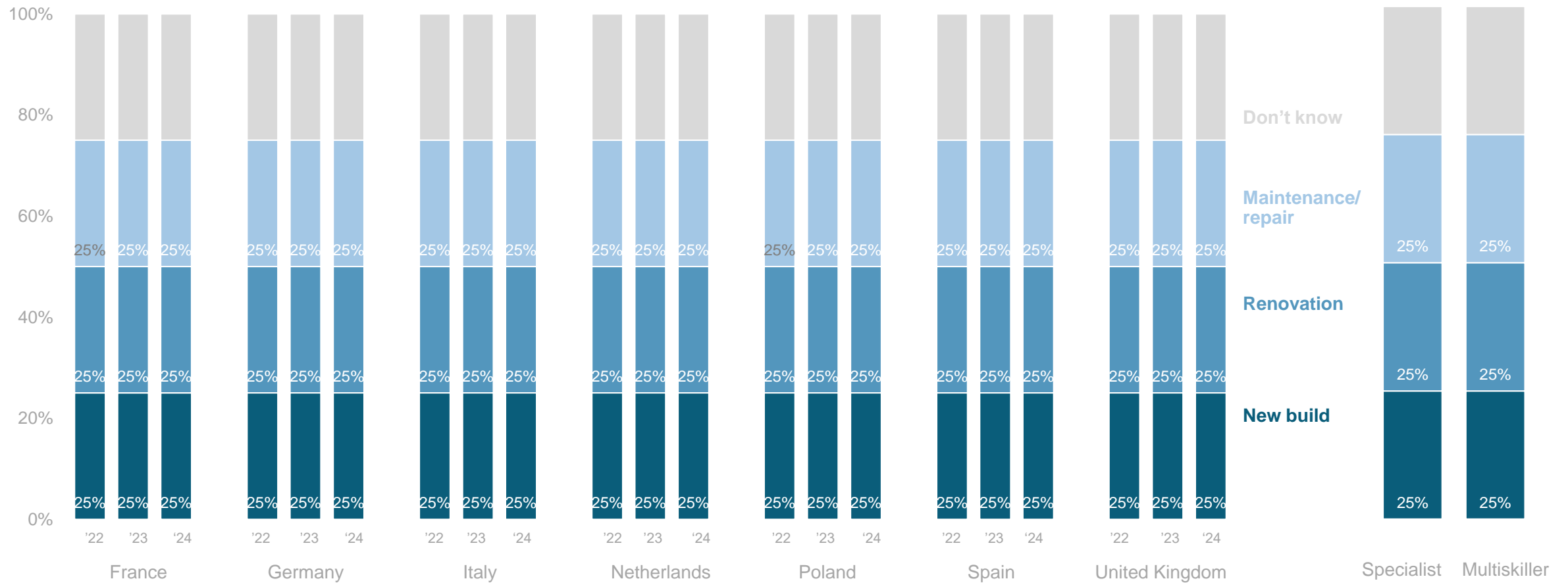
How big is your current order book portfolio in months? So, how many months is your company fully booked with jobs? *[spontaneous]*



...Conclusion

Type of projects

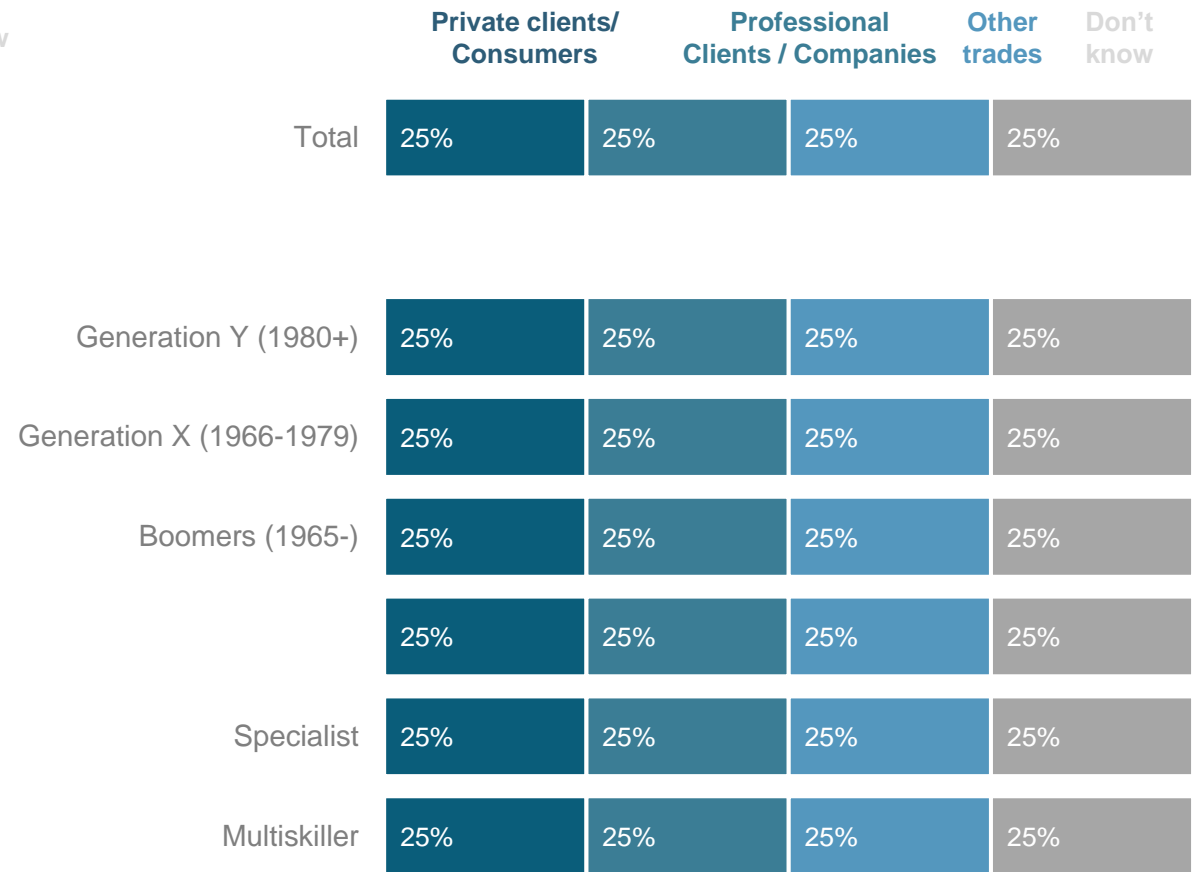
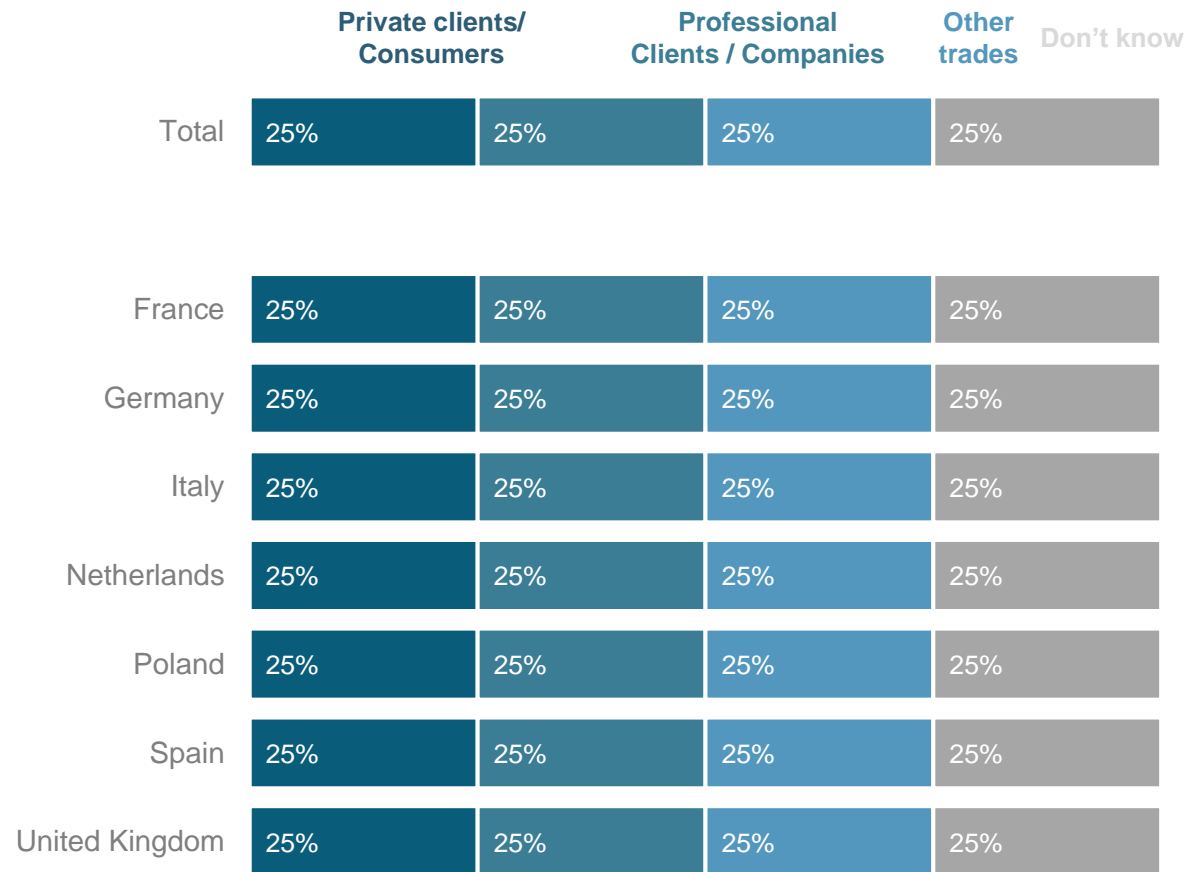
Can you divide your turnover between new build, renovation, and maintenance work? *[read out]*



...Conclusion

Type of projects

What share of your projects do you work for ...? *[read out]*



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Key insights

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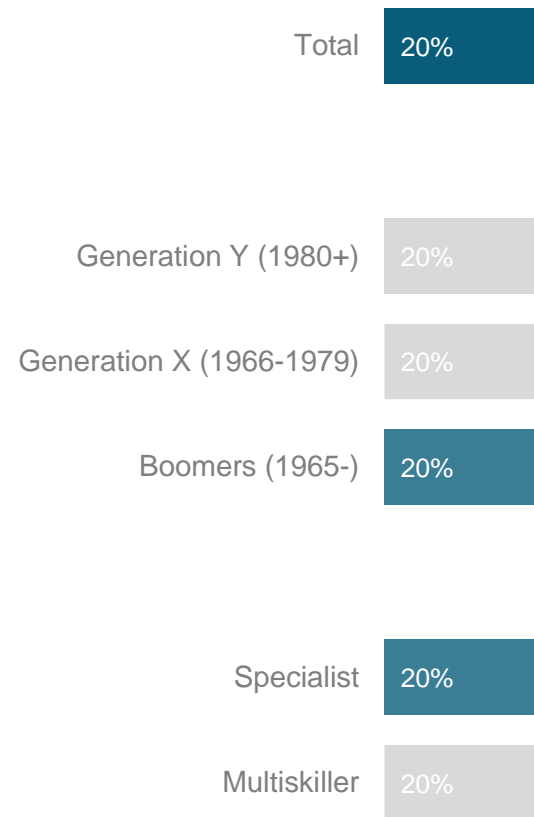
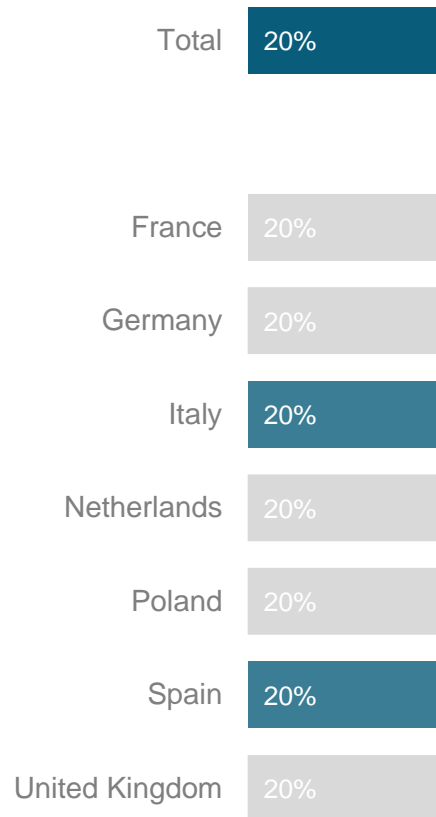
Brand funnel



...Conclusion

Handyman purchasing power

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



...Conclusion

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

Do you/ does your company buy the following product groups yourself/ itself for the jobs you do? *[read out]*

		France	Germany	Italy	Netherlands	Poland	Spain	United Kingdom
Power tools and accessories	20%	20%	20%	20%	20%	20%	20%	20%
Insulation materials	20%	20%	20%	20%	20%	20%	20%	20%
Roofing products	20%	20%	20%	20%	20%	20%	20%	20%
Adhesives	20%	20%	20%	20%	20%	20%	20%	20%
Masking tapes	20%	20%	20%	20%	20%	20%	20%	20%
Sealants	20%	20%	20%	20%	20%	20%	20%	20%
Switches and sockets	20%	20%	20%	20%	20%	20%	20%	20%
Interior wall paints	20%	20%	20%	20%	20%	20%	20%	20%
Façade products	20%	20%	20%	20%	20%	20%	20%	20%
Sanitary products	20%	20%	20%	20%	20%	20%	20%	20%
Roof windows	20%	20%	20%	20%	20%	20%	20%	20%
Tiles	20%	20%	20%	20%	20%	20%	20%	20%
Floor covering	20%	20%	20%	20%	20%	20%	20%	20%
Lacquers	20%	20%	20%	20%	20%	20%	20%	20%

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

...Conclusion

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

Do you/ does your company buy the following product groups yourself/ itself for the jobs you do? *[read out]*

		Generation Y (1980+)	Generation X (1966-1979)	Baby boomers (1965-)	Specialist	Multiskiller
Power tools and accessories	20%	20%	20%	20%	20%	20%
Insulation materials	20%	20%	20%	20%	20%	20%
Roofing products	20%	20%	20%	20%	20%	20%
Adhesives	20%	20%	20%	20%	20%	20%
Masking tapes	20%	20%	20%	20%	20%	20%
Sealants	20%	20%	20%	20%	20%	20%
Switches and sockets	20%	20%	20%	20%	20%	20%
Interior wall paints	20%	20%	20%	20%	20%	20%
Façade products	20%	20%	20%	20%	20%	20%
Sanitary products	20%	20%	20%	20%	20%	20%
Roof windows	20%	20%	20%	20%	20%	20%
Tiles	20%	20%	20%	20%	20%	20%
Floor covering	20%	20%	20%	20%	20%	20%
Lacquers	20%	20%	20%	20%	20%	20%

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

Differences regarding QUALITY

Countries

Handymen from **xx** and **xx** tend to put quality above price. They prefer to buy the best quality products, even when it is more expensive. They also prefer purchasing from a wholesaler/ distributor who has a reputation for excellent customer service, even if all the products are more expensive. **xx** handymen seem to shop around more to get the best prices. Loyalty programs are of interest to most handymen, but the least interest can be found in the **xx** and **xx**.

Age

On most quality statements, the different age groups are sharing the same opinion. The biggest difference can be found when it comes to **xx**. Baby boomers rather go for **xx** than for **xx**.

Multiskiller vs. specialist

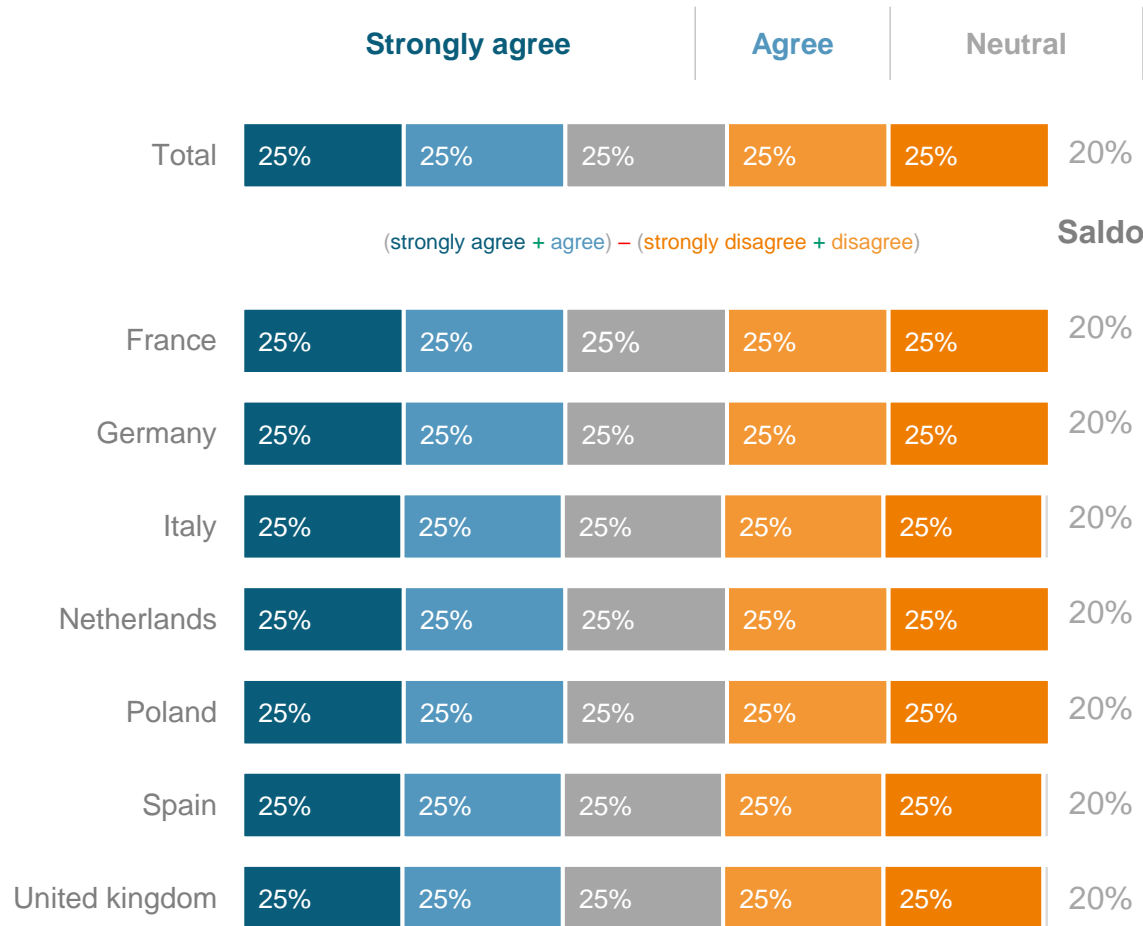
xx prefer to go shopping at a wholesaler/ distributor that offers loyalty programs/ discounts and has a reputation for offering excellent customer service.



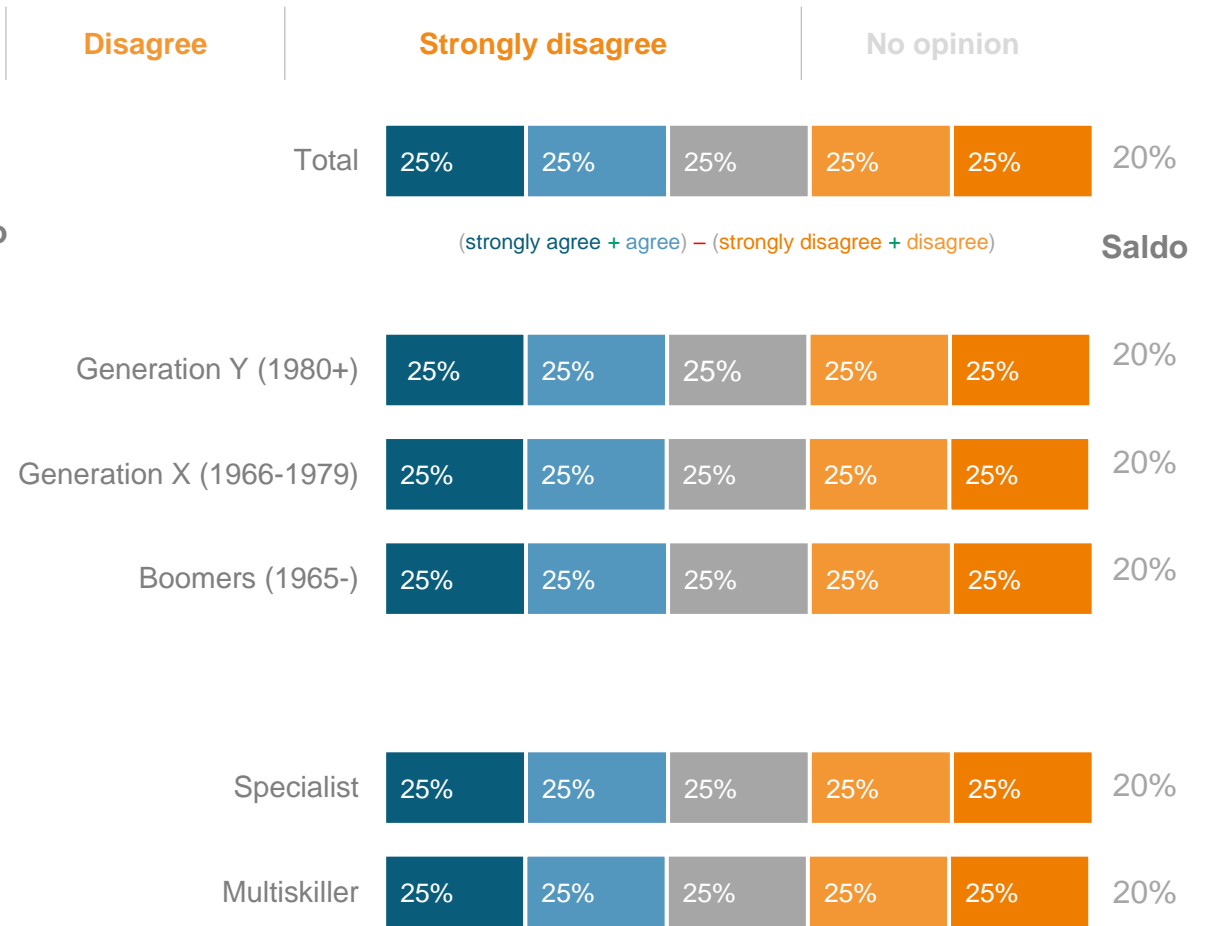
...Conclusion

STATEMENT

I always buy the best quality product even if it is more expensive. *[read out]*



N=668; France N=92; Germany N=106; Italy N=107; Netherlands N=90; Poland N=87; Spain N=81; United Kingdom N=104

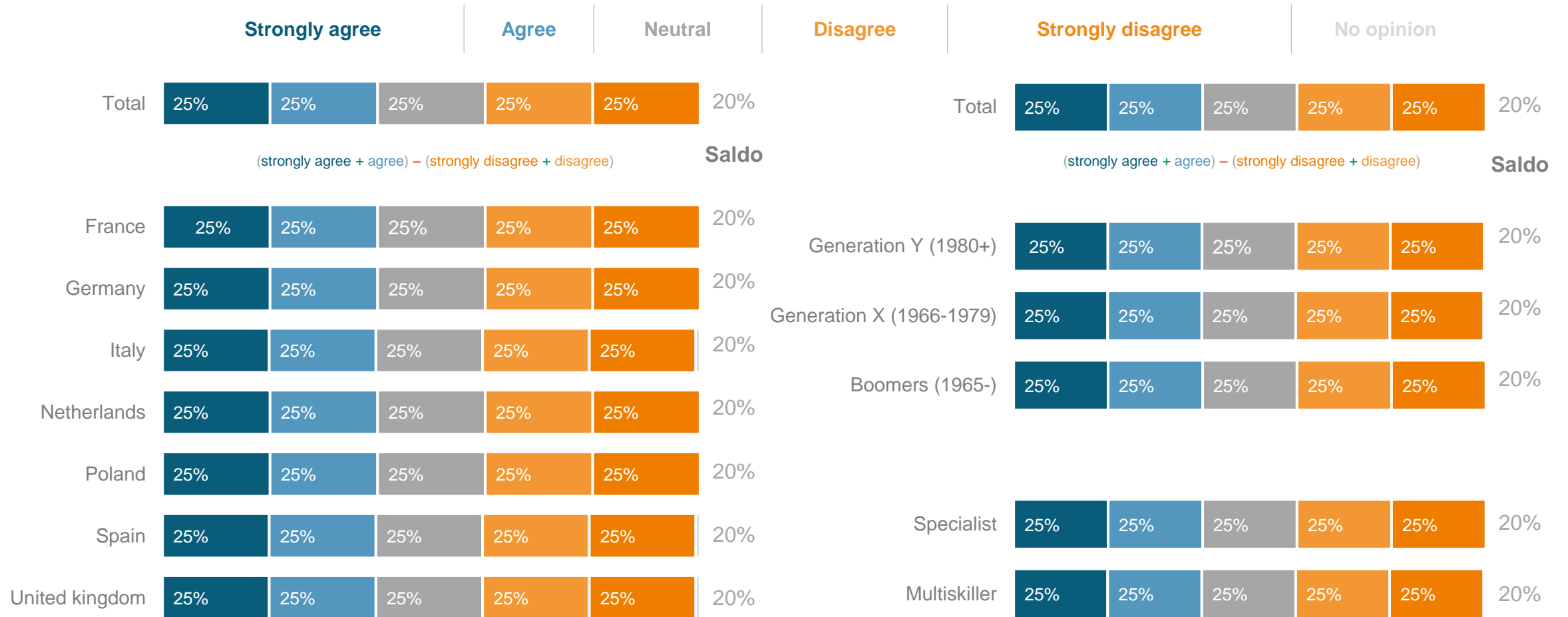


Generation Y N=248; Generation X N=356; Baby boomers N=98; Specialist N=185; Multiskiller N=509

...Conclusion

STATEMENT

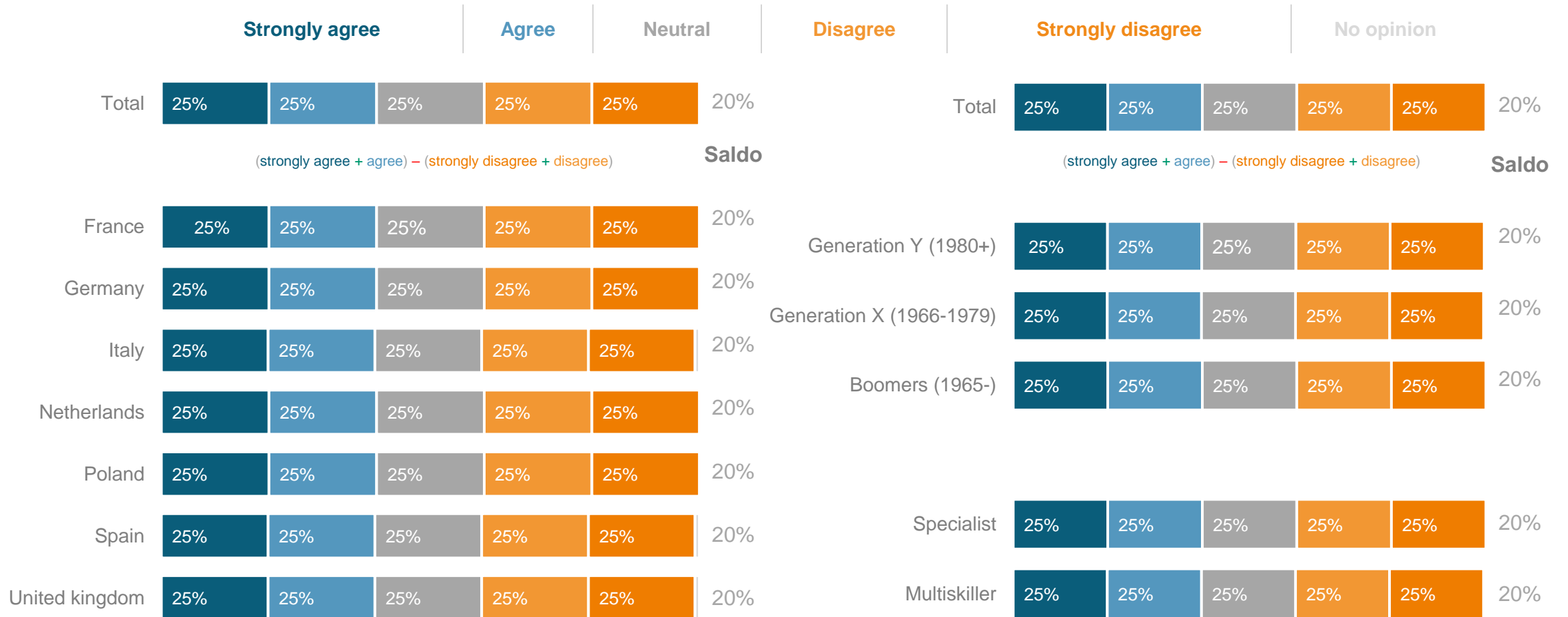
I prioritize purchasing from a wholesaler/ distributor who offers competitive pricing, even if it means compromising on quality. *[read out]*



...Conclusion

STATEMENT

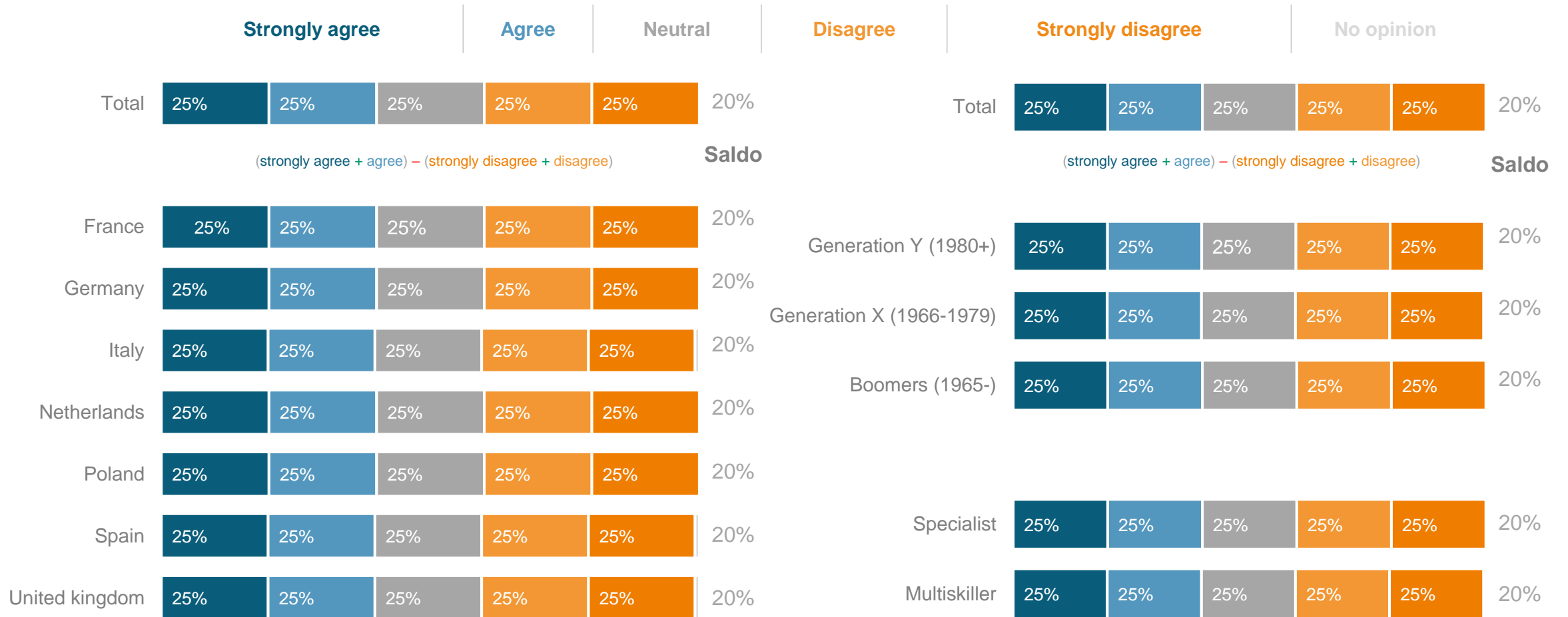
I prioritize buying from a wholesaler/ distributor who offers a full range of product options (one-stop-shopping) instead of buying at different specialist stores. *[read out]*



...Conclusion

STATEMENT

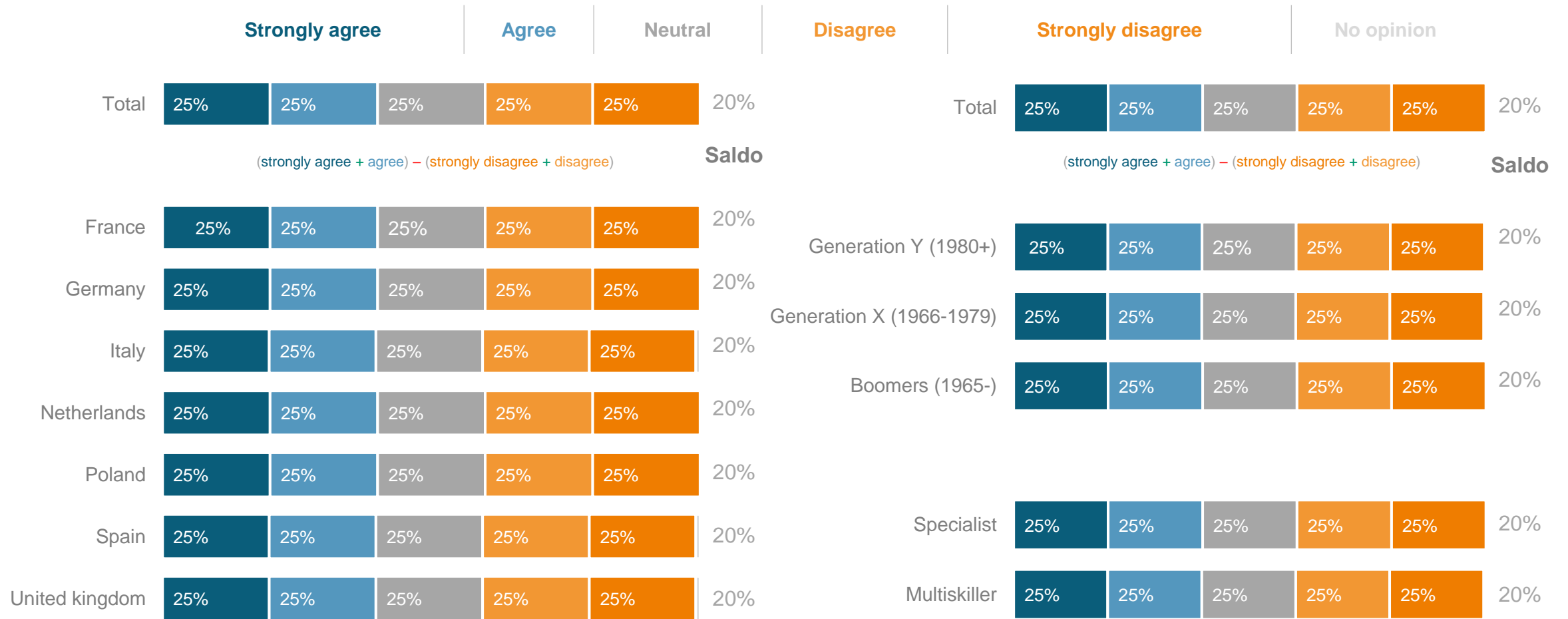
I prefer purchasing from a wholesaler/ distributor who has a reputation for excellent customer service, even if all the products are more expensive. *[read out]*



...Conclusion

STATEMENT

I prioritize purchasing from a wholesaler/ distributor who offers loyalty programs or discounts for repeat purchases. *[read out]*



Differences regarding SUSTAINABILITY

Countries

Handymen from especially **xx** and to a lesser extent from **xx** and **xx** seem to care more about sustainability than their colleagues from **xx**. Handymen from **xx** and the **xx** are less inclined to buy brands that care for the environment, and they also show less preference for a wholesaler/ distributor who offers sustainable options than other handymen do.

Age

Even though we see different opinions towards the sustainability statements within the age groups, it seems that overall, **xx** care more about the environment than **xx**. A possible explanation could be **xx**.

Multiskiller vs. specialist

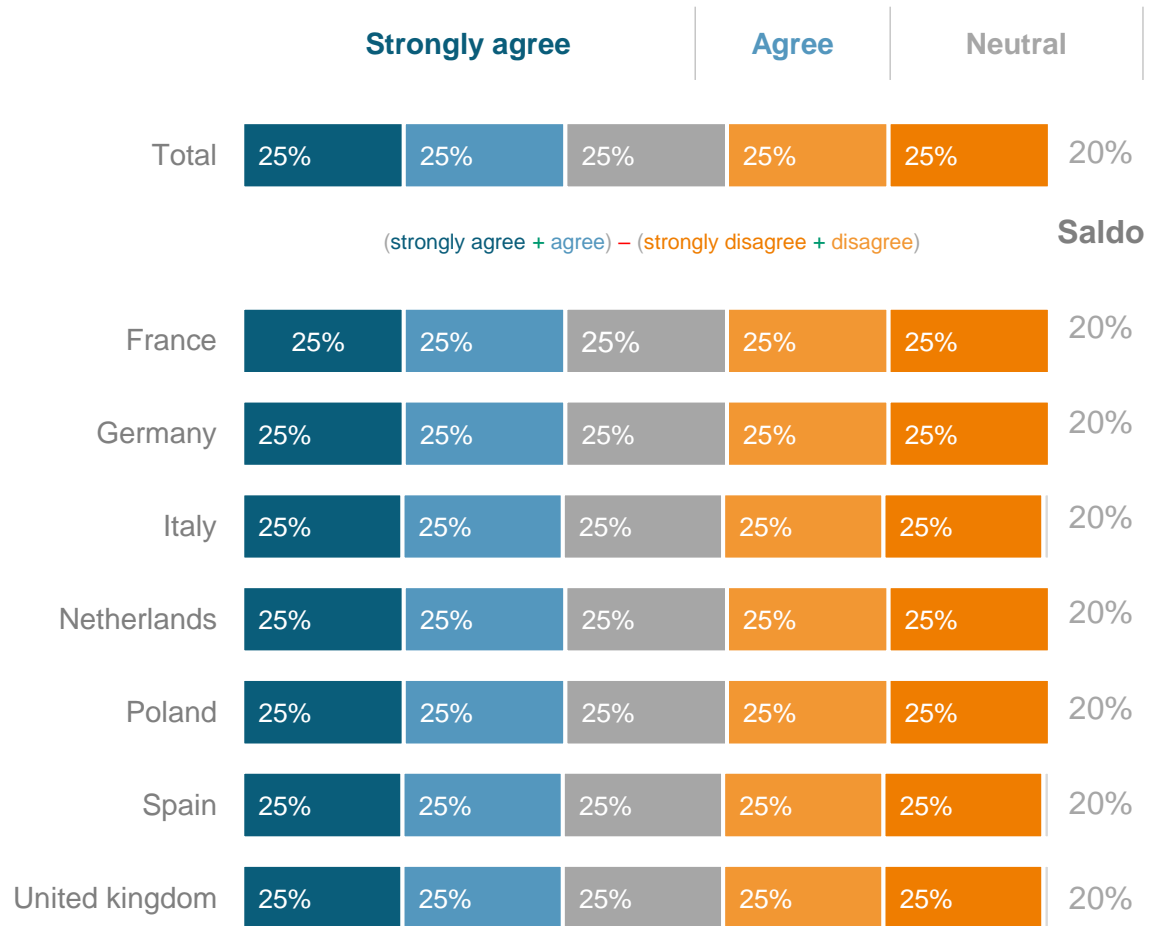
xx are also slightly more in favour of sustainability than **xx**.



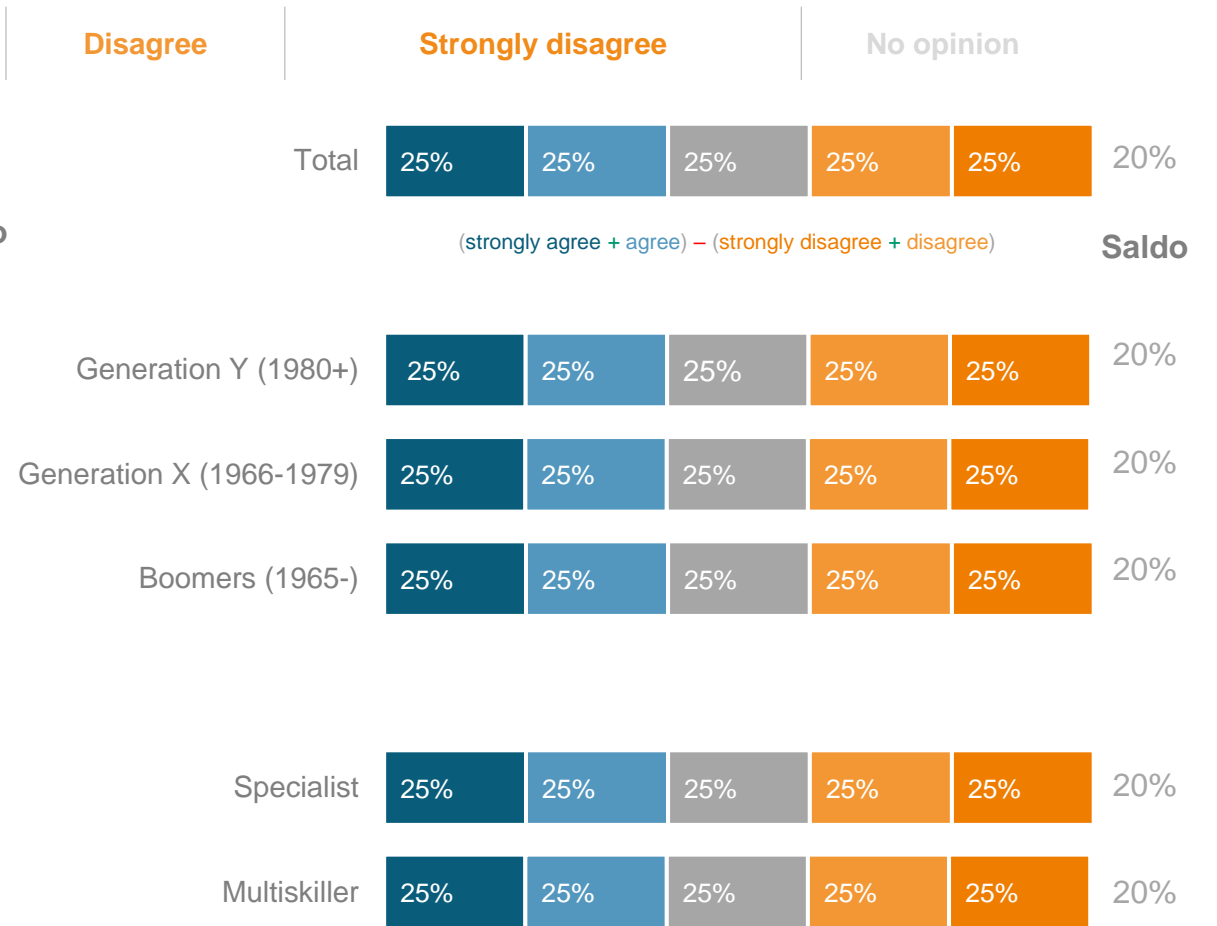
...Conclusion

STATEMENT

I only buy brands that care for the environment. *[read out]*



N=668; France N=92; Germany N=106; Italy N=107; Netherlands N=90; Poland N=87; Spain N=81; United Kingdom N=104

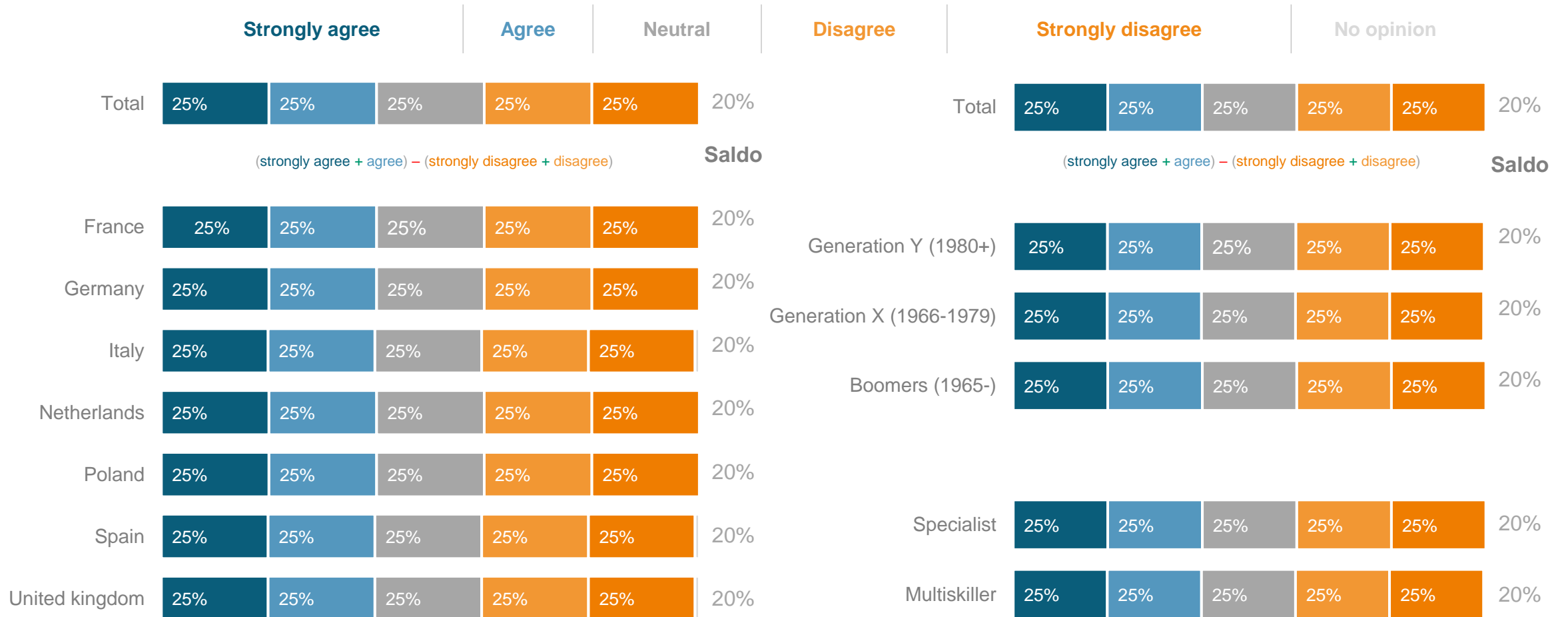


Generation Y N=252; Generation X N=329; Baby boomers N=107; Specialist N=174; Multiskiller N=530

...Conclusion

STATEMENT

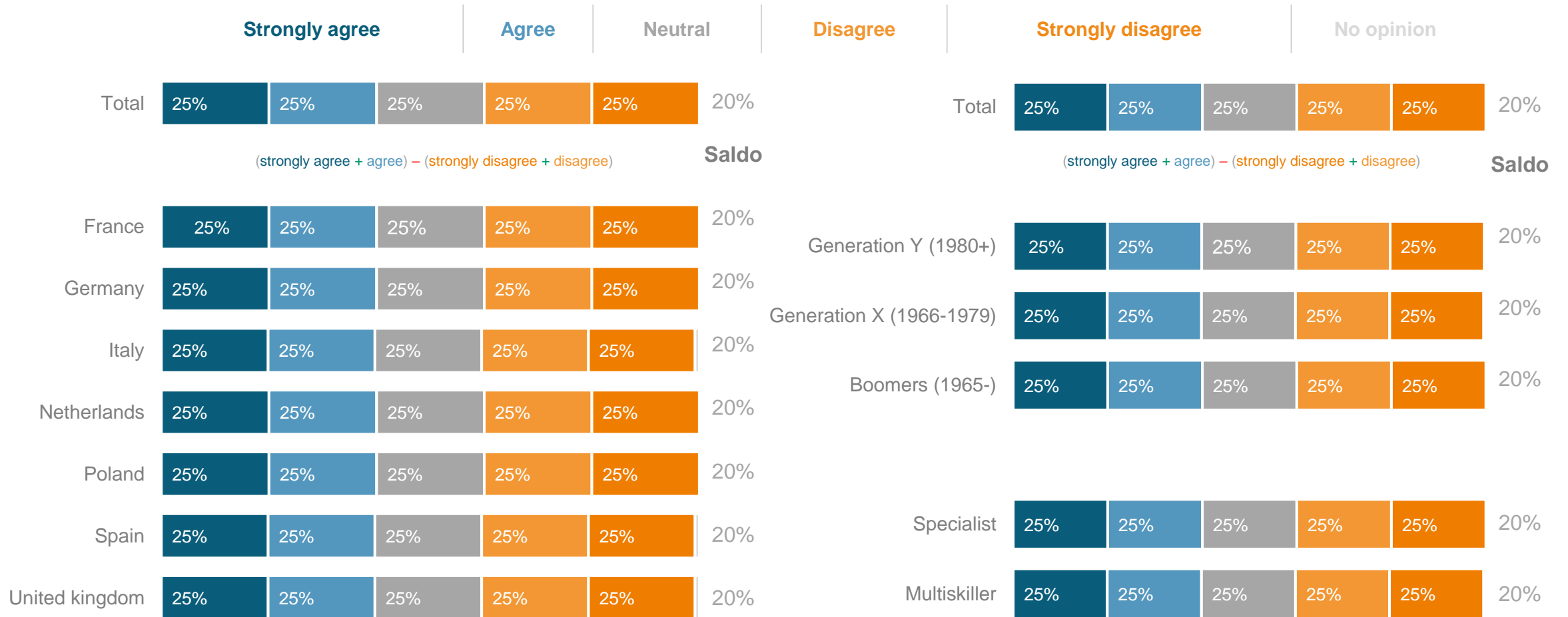
I always buy environment-friendly products even if they are more expensive. *[read out]*



...Conclusion

STATEMENT

I often consider the environmental impact of the products I purchase and prefer a wholesaler/ distributor who offers sustainable options. *[read out]*



Differences regarding ONLINE SHOPPING

Countries

Although it is not the majority yet, most handymen that buy most of their products online can be found in the **xx** and to a lesser extent in **xx**. These were the countries where **xx**. In these two countries, as well as in **xx**, handymen are also in favour of a wholesalers/ distributors who provide convenient online ordering platforms or mobile apps for easy payment options. Handymen from **xx** are less eager to buy online.

Age

We do not see big differences between the age groups when looking at ordering most products online. However, when looking at wholesalers providing convenient online ordering platforms, we see that **xx** prefer those wholesalers more than **xx**.

Multiskiller vs. specialist

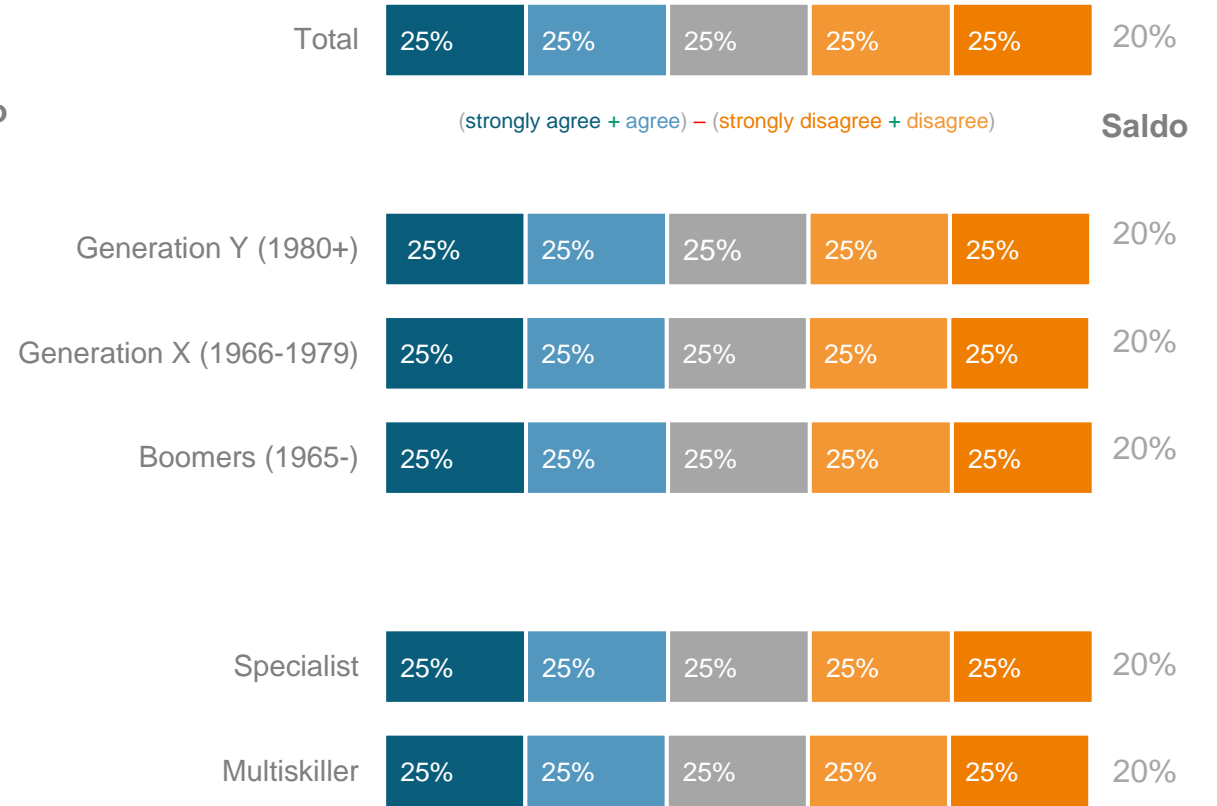
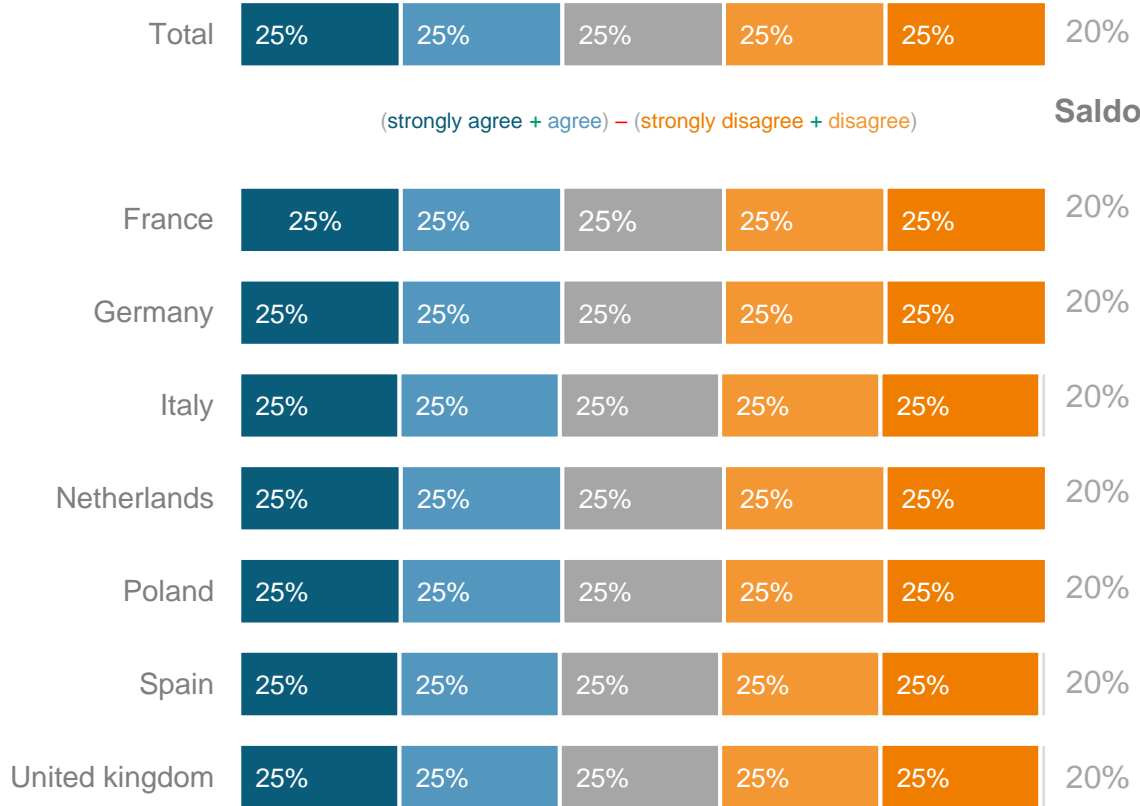
xx are slightly more inclined to prefer online ordering options than **xx**, even though the majority within each group is more traditionally focussed.



...Conclusion

STATEMENT

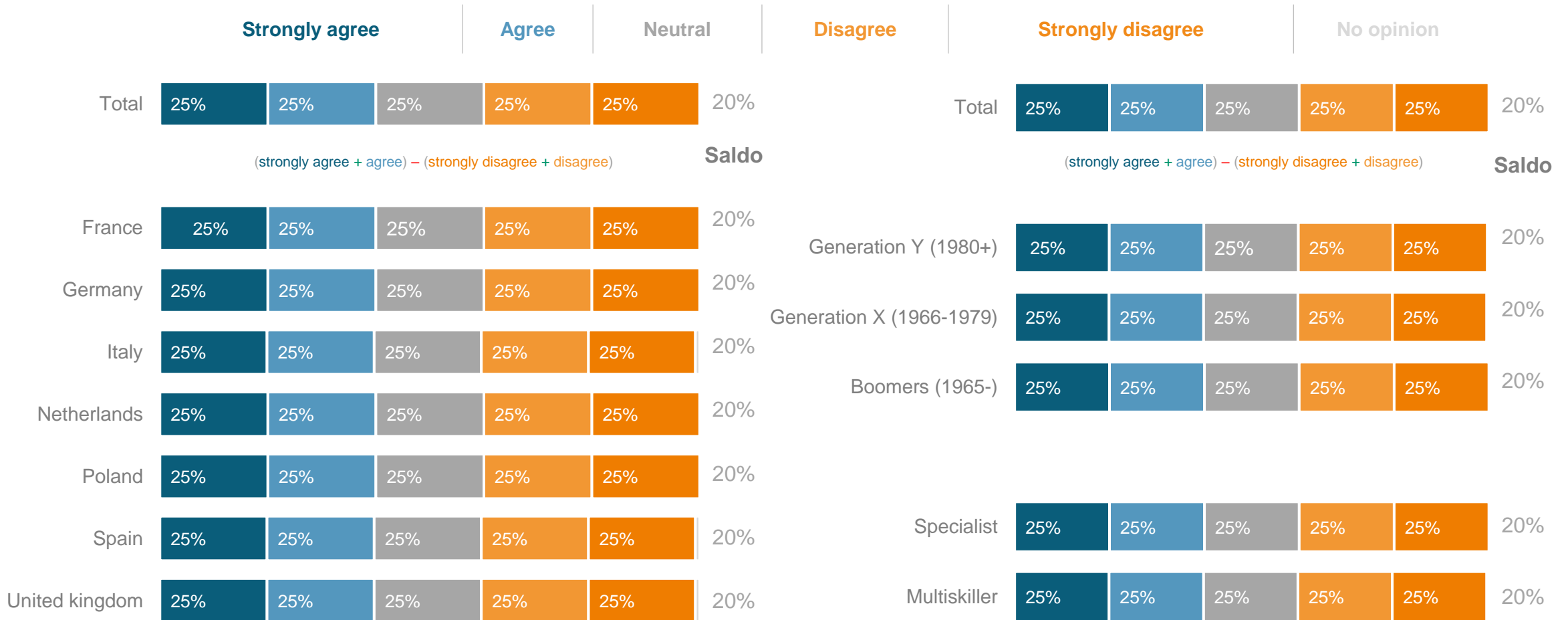
I order most of my products online. *[read out]*



...Conclusion

STATEMENT

I prefer to buy from a wholesaler/ distributor who provides convenient online ordering platforms or mobile apps for easy payment options. *[read out]*



Differences regarding INNOVATION-HABIT

Countries

Handymen from **xx** are buying the latest products and tools the most, followed by **xx** and **xx** handymen. The biggest group of handymen who disagree with this statement can be found in **xx** and **xx**. Handymen from **xx** and **xx** state that they only buy from brands that are well-known the most.

Age

There are no big differences between the three age groups when it comes to buying latest products and tools or buying from brands that are well-known.

Multiskiller vs. specialist

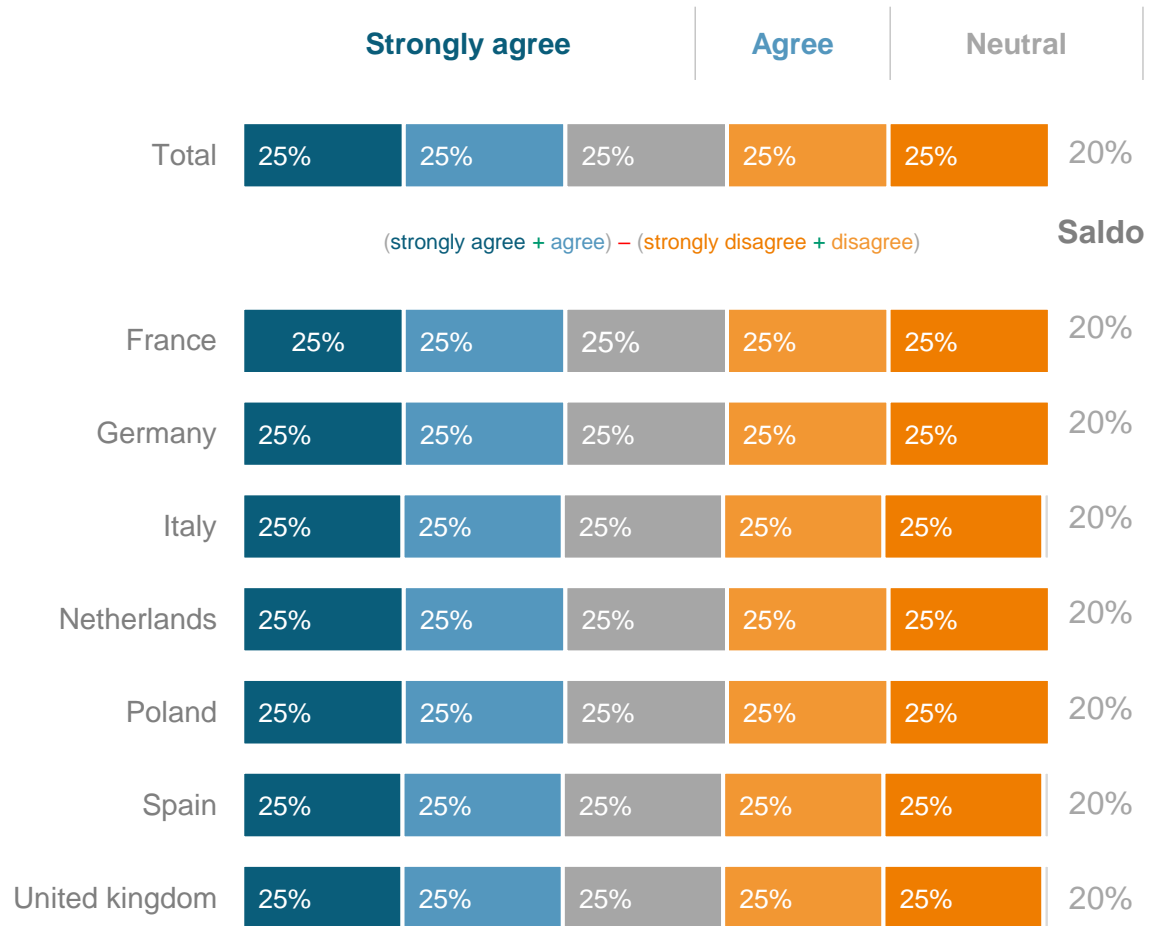
xx are slightly more inclined to buy the latest products and tools than **xx** are.



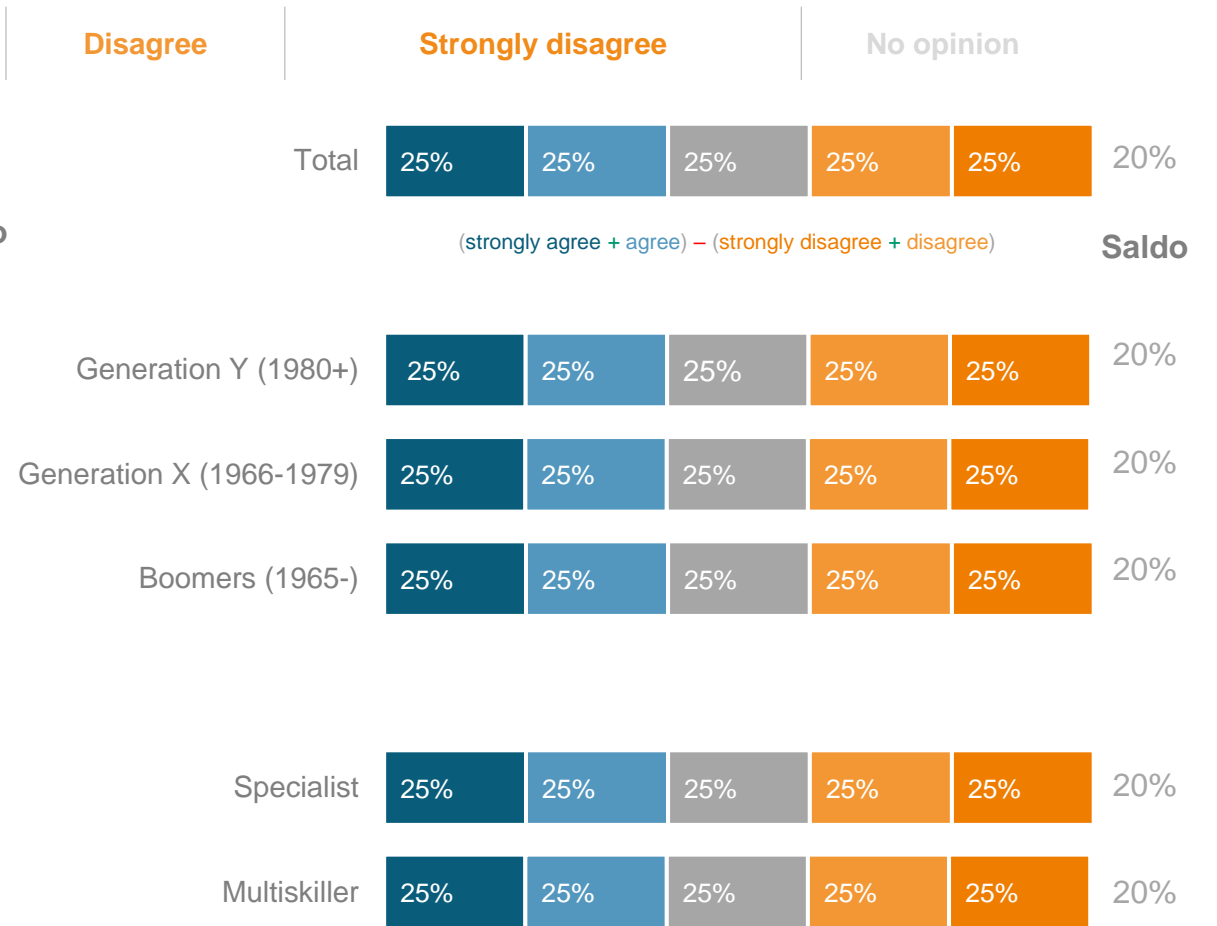
...Conclusion

STATEMENT

I always buy the latest products and tools. *[read out]*



N=668; France N=92; Germany N=106; Italy N=107; Netherlands N=90; Poland N=87; Spain N=81; United Kingdom N=104

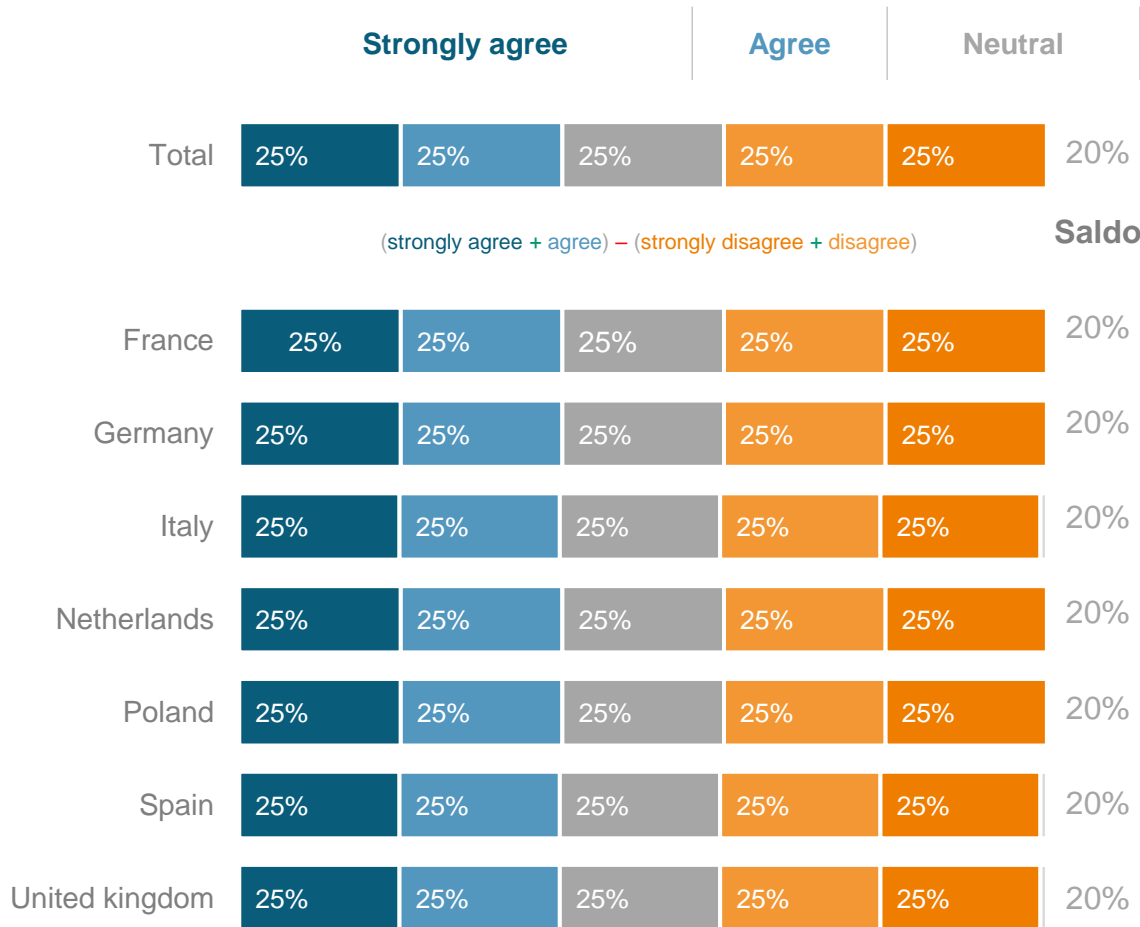


Generation Y N=239; Generation X N=330; Baby boomers N=99; Specialist N=149; Multiskiller N=512

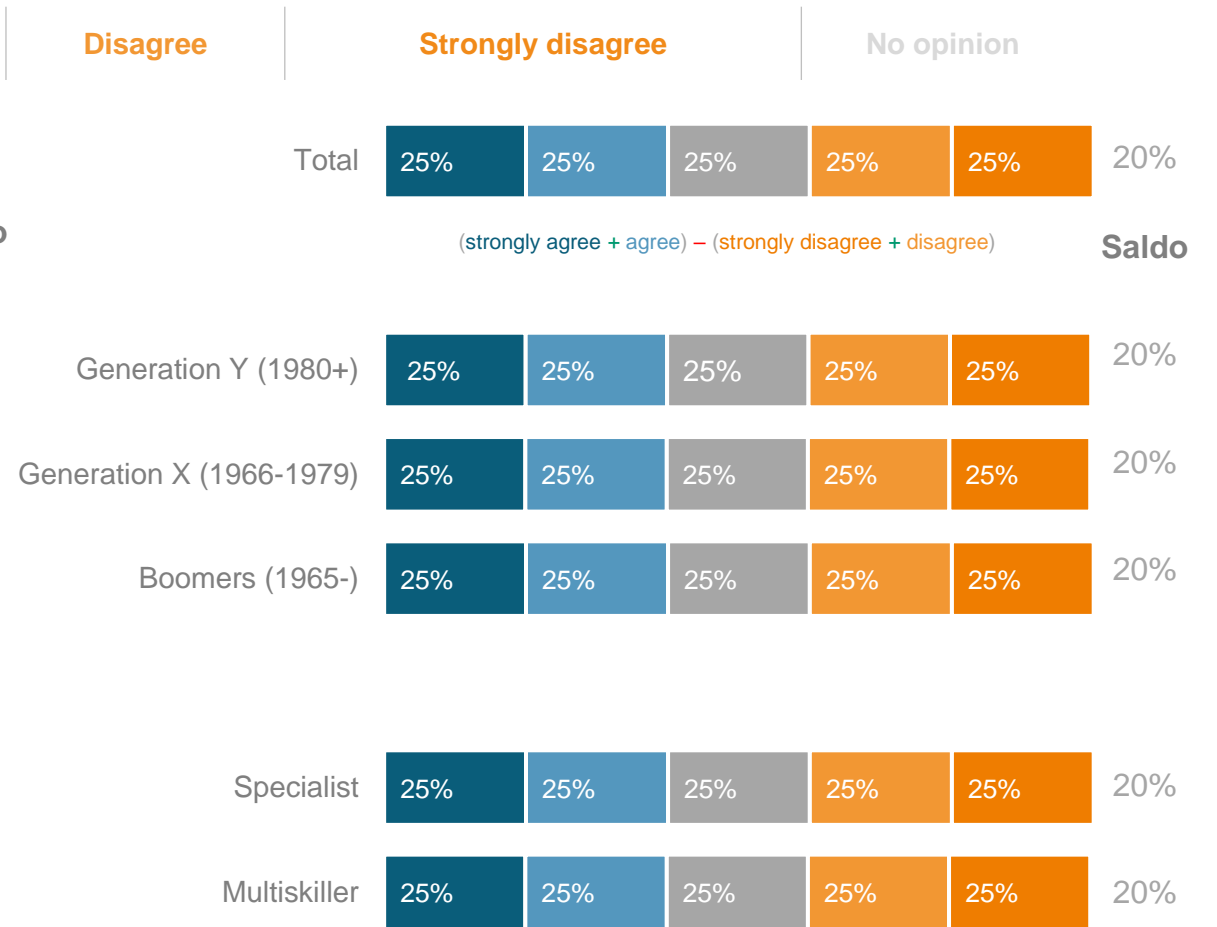
...Conclusion

STATEMENT

I only buy from brands that are well known. *[read out]*



N=668; France N=92; Germany N=106; Italy N=107; Netherlands N=90; Poland N=87; Spain N=81; United Kingdom N=104



Generation Y N=259; Generation X N=326; Baby boomers N=114; Specialist N=172; Multiskiller N=518

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Key insights

Background research

Buying behaviour

Private label vs. branded products

General

Product group specific

Brand funnel



...Conclusion

Other provided services

What kind of (construction-related) products do you mostly buy private label? *[spontaneous]*

Total		France	Germany	Italy	Netherlands	Poland	Spain	United Kingdom
Fixing materials (screws, mechanical fixings, dowels, etc)	20%	20%	20%	20%	20%	20%	20%	20%
Adhesives	20%	20%	20%	20%	20%	20%	20%	20%
Interior wall paints	20%	20%	20%	20%	20%	20%	20%	20%
Construction material	20%	20%	20%	20%	20%	20%	20%	20%
Sealants	20%	20%	20%	20%	20%	20%	20%	20%
Concrete, cement	20%	20%	20%	20%	20%	20%	20%	20%
Hand tools	20%	20%	20%	20%	20%	20%	20%	20%
Power tools and accessories	20%	20%	20%	20%	20%	20%	20%	20%
Masking tapes	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%

N=1346; France N=199; Germany N=198; Italy N=182; Netherlands N=199; Poland N=185 Spain N=189; United Kingdom N=192

Differences regarding PRIVATE LABELS

Countries

It is not likely that private labels will be used significantly more in the next three years, even though a quarter of the handymen in the **xx** and **xx** think they will use more private labels. Most handymen think that **xx** offer better **xx**, more **xx** and more **xx** than **xx**. Handymen that do not see these differences between branded products and private labels can be found in **xx** (all three statements), **xx** (services), **xx**(warranty) and **xx**(warranty). Regarding the technical advantage and the innovativeness of branded products over private labels, most handymen agree to that statement, but the handymen from **xx** (technical advantage) and **xx**(innovativeness) are less outspoken about it.

Age

xx, and to a lesser extent **xx**, are more in favour of branded products than **xx**. But in the age group of **xx**, the majority prefers branded products.

Multiskiller vs. specialist

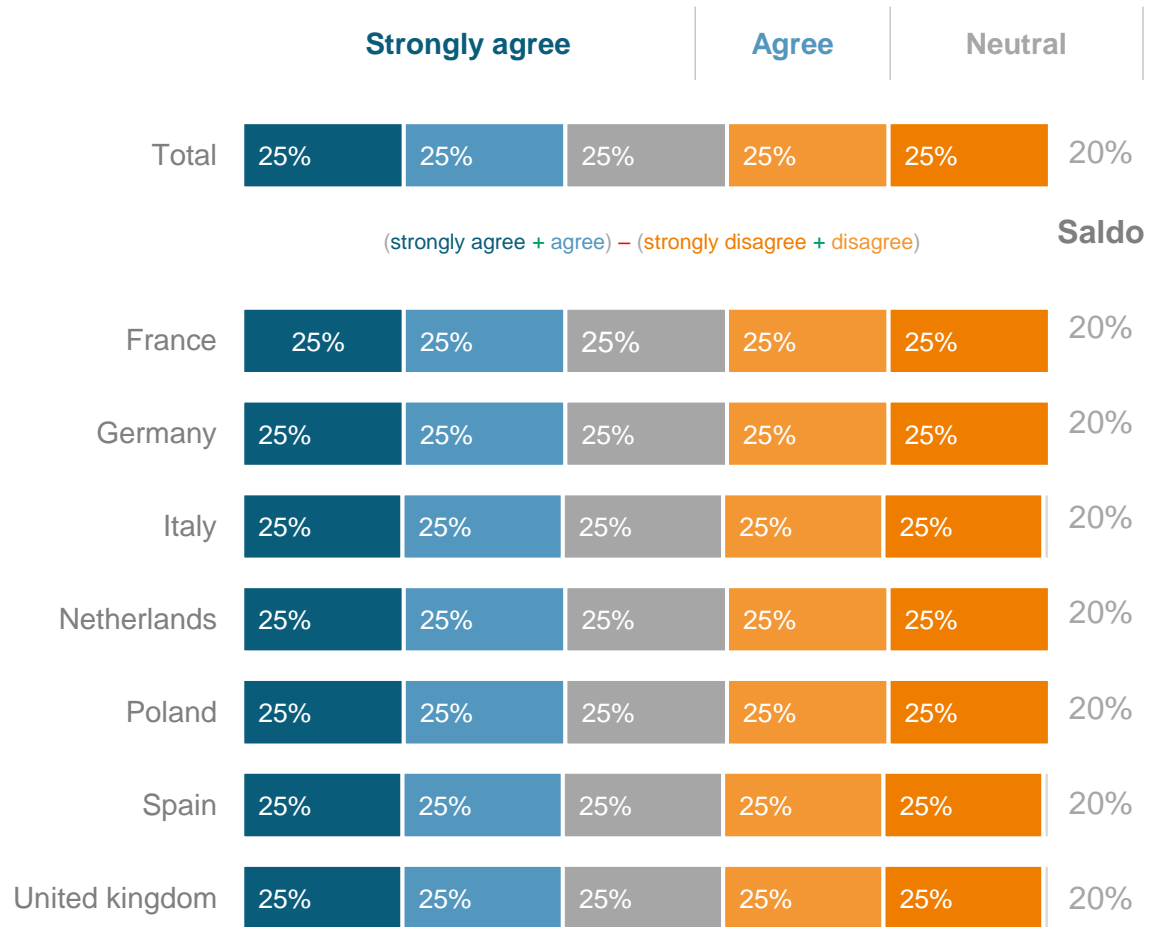
The differences between multiskillers and specialists are not big when it comes to private labels. The only big difference we saw was regarding **xx** : there, **xx** are more in favour of the branded products than the **xx**.



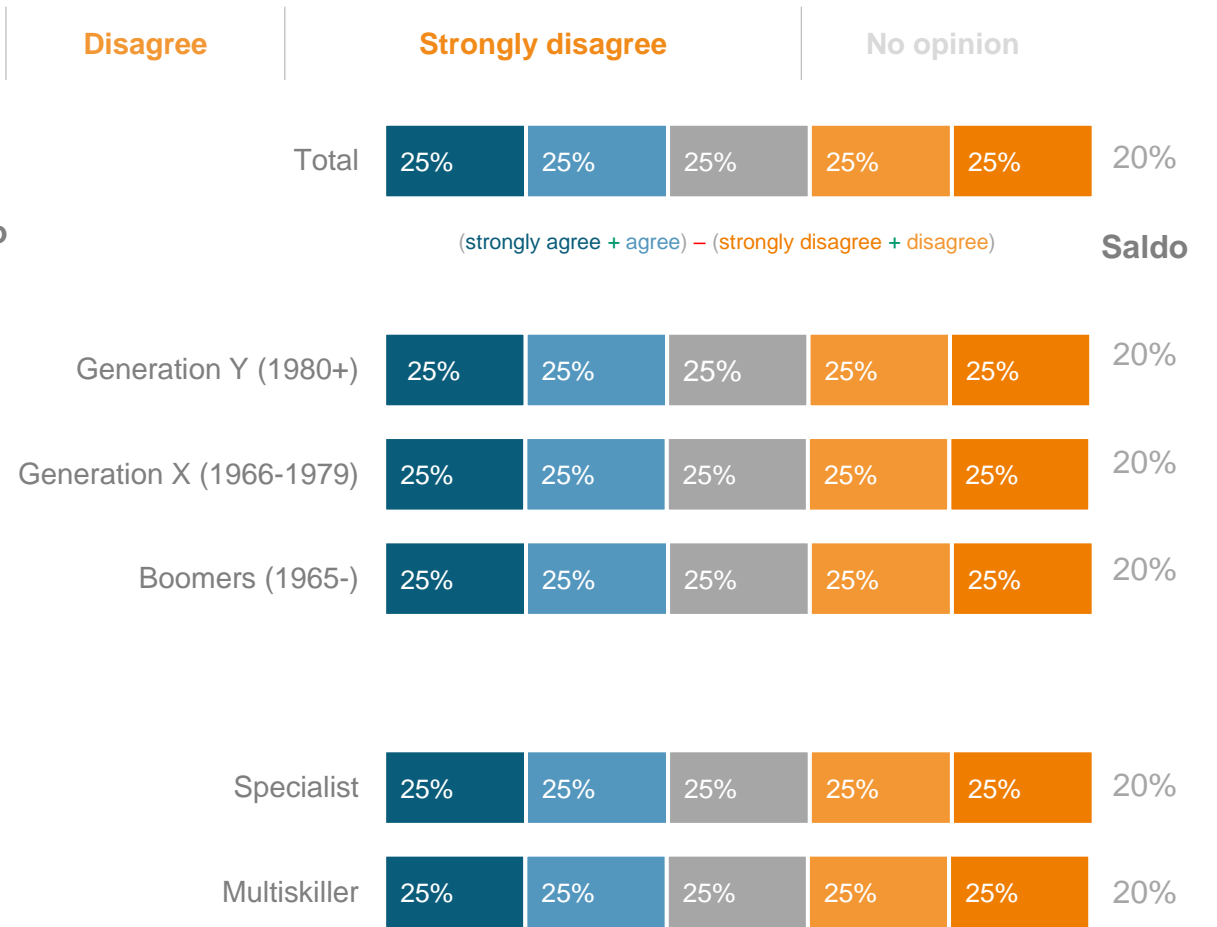
...Conclusion

STATEMENT

I will be using more private labels in the next 3 years. *[read out]*



N=687; France N=105; Germany N=93; Italy N=94; Netherlands N=101; Poland N=83 Spain N=100; United Kingdom N=110

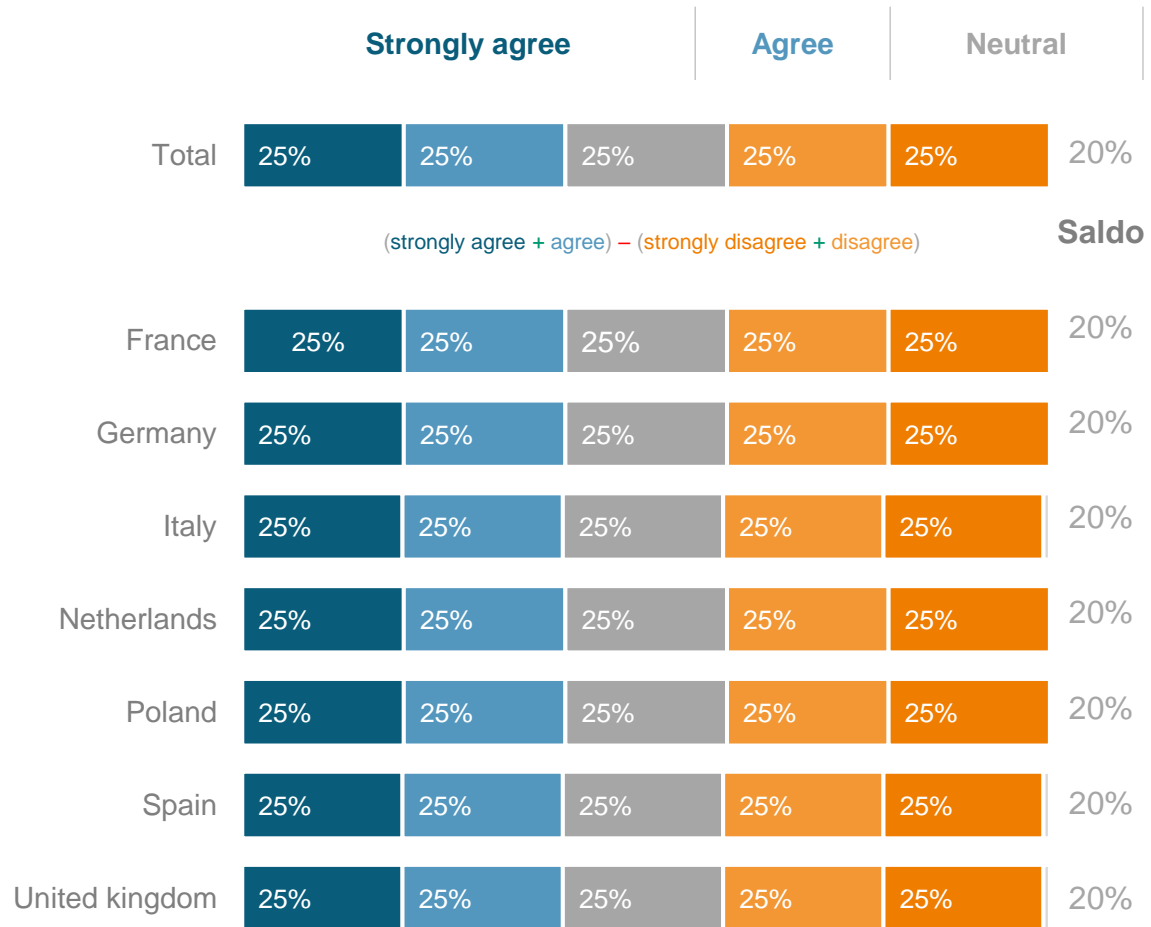


Generation Y N=248; Generation X N=327; Baby boomers N=112; Specialist N=169; Multiskiller N=512

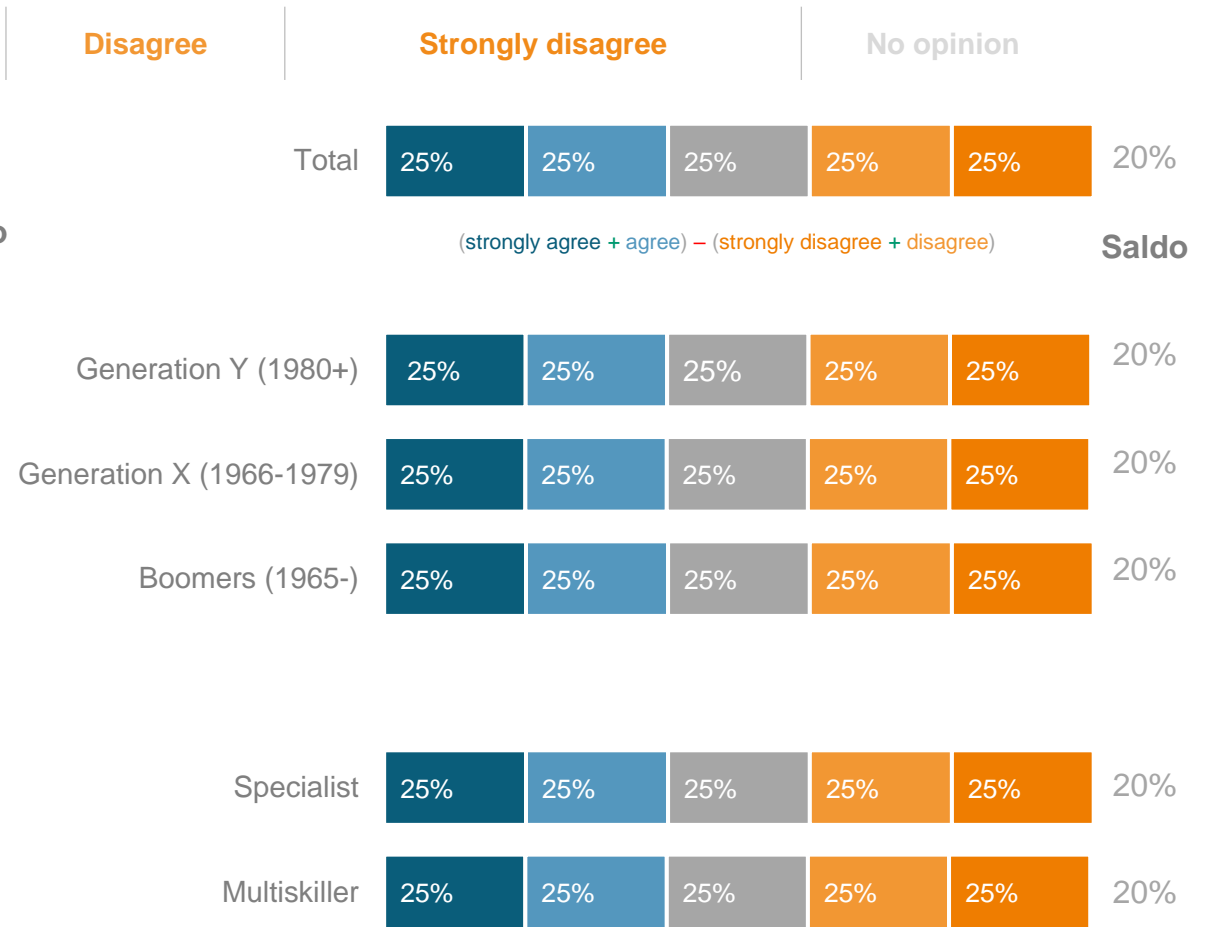
...Conclusion

STATEMENT

Branded products offer better quality than private labels. *[read out]*



N=687; France N=105; Germany N=93; Italy N=94; Netherlands N=101; Poland N=83 Spain N=100; United Kingdom N=110

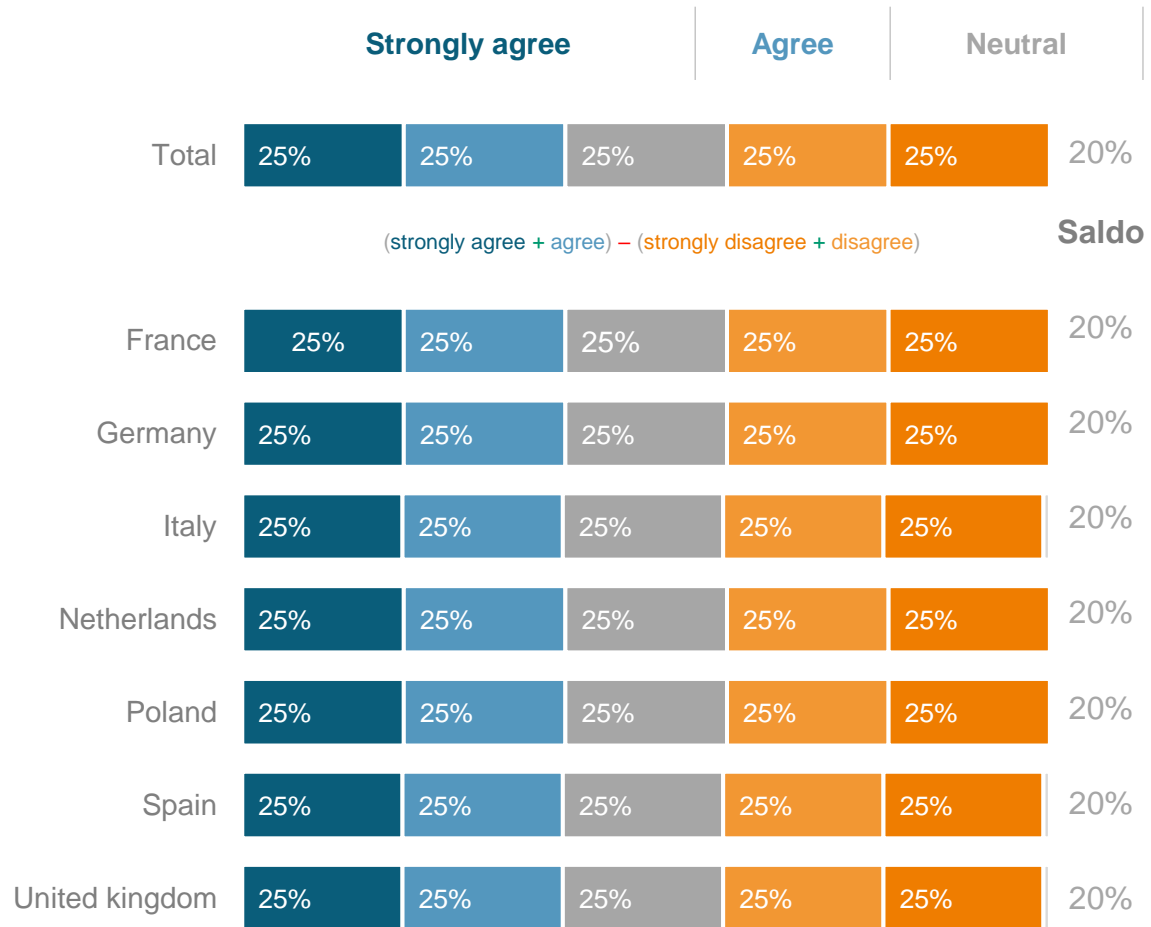


Generation Y N=277; Generation X N=326; Baby boomers N=104; Specialist N=173; Multiskiller N=525

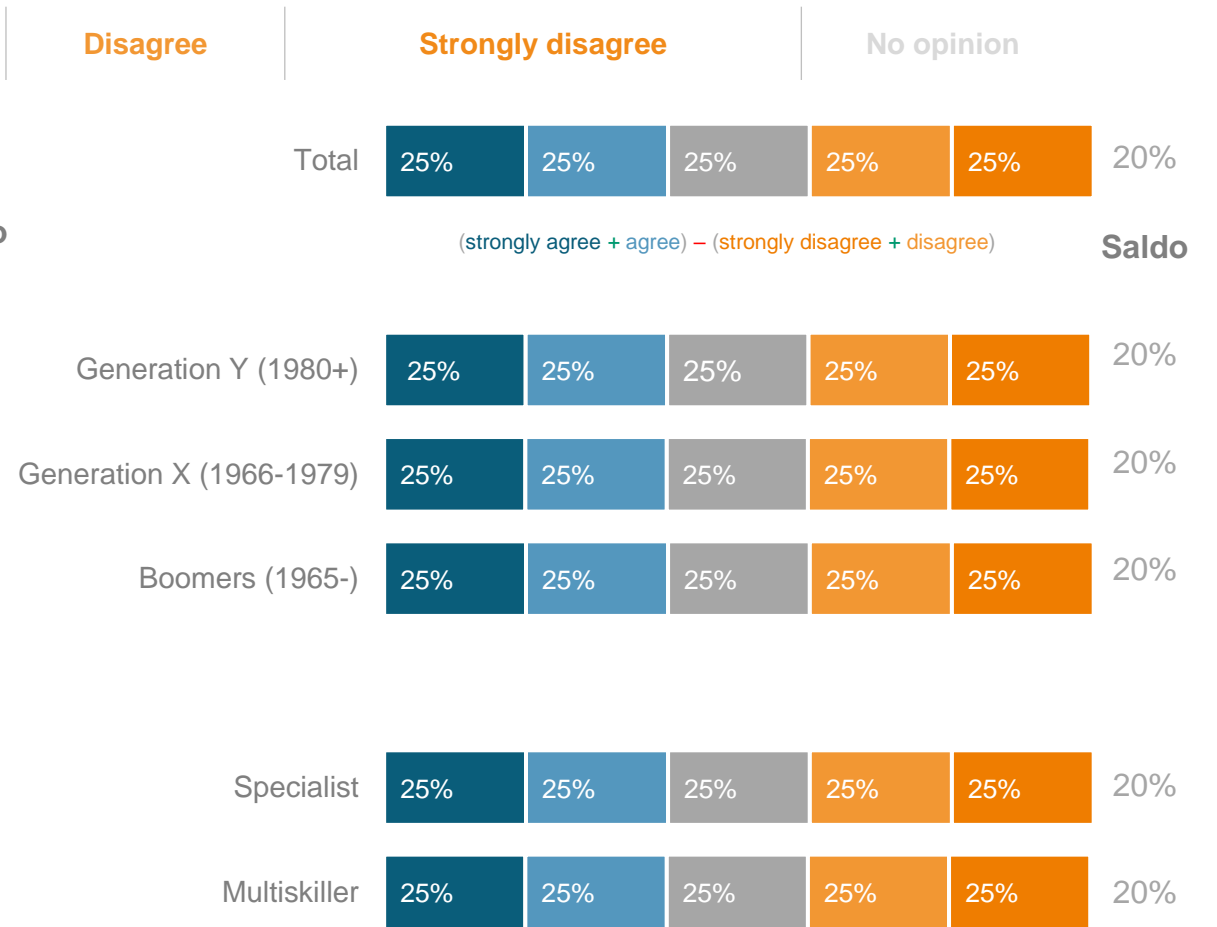
...Conclusion

STATEMENT

Branded products offer more services than private labels. *[read out]*



N=687; France N=105; Germany N=93; Italy N=94; Netherlands N=101; Poland N=83 Spain N=100; United Kingdom N=110

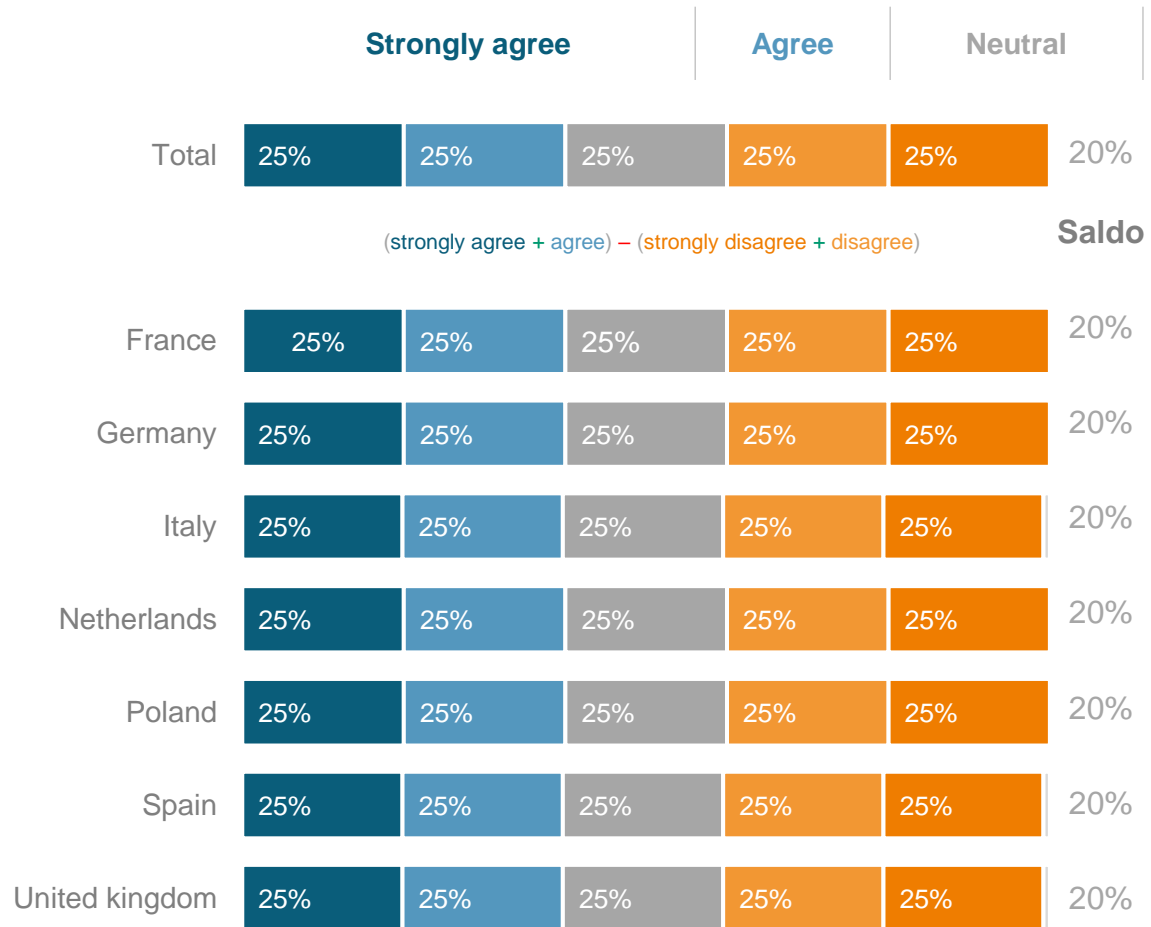


Generation Y N=224; Generation X N=321; Baby boomers N=108; Specialist N=154; Multiskiller N=491

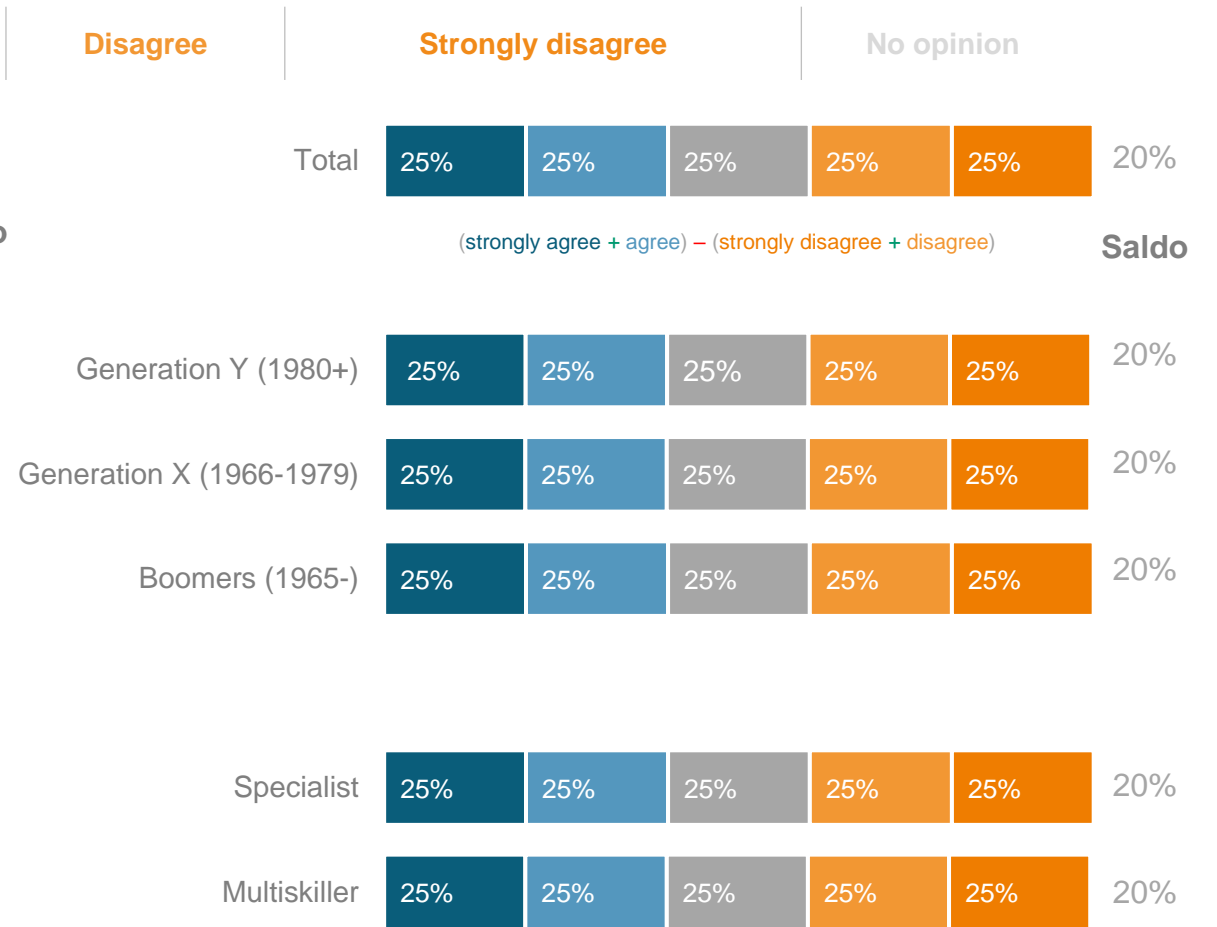
...Conclusion

STATEMENT

Branded products offer more warranty than private labels. *[read out]*



N=687; France N=105; Germany N=93; Italy N=94; Netherlands N=101; Poland N=83 Spain N=100; United Kingdom N=110

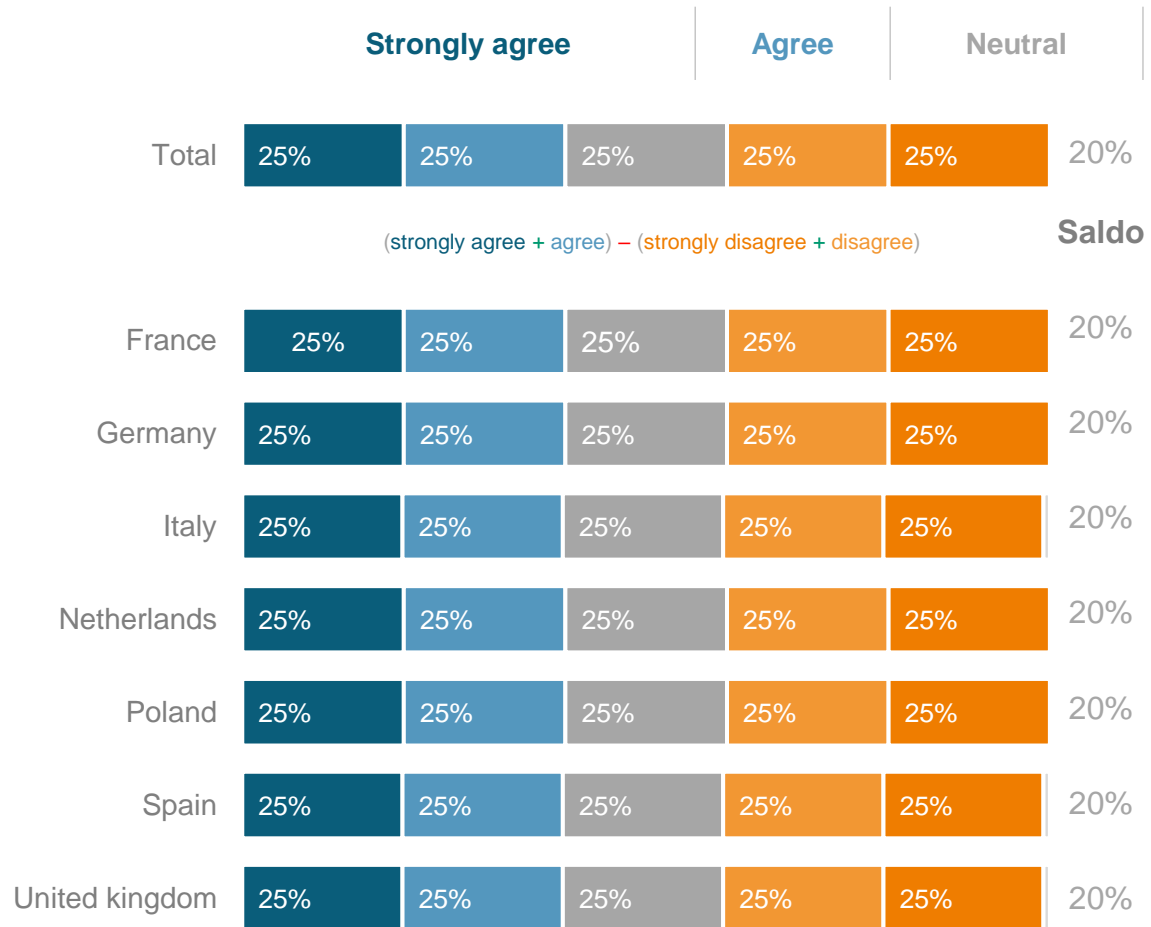


Generation Y N=263; Generation X N=333; Baby boomers N=103; Specialist N=158; Multiskiller N=526

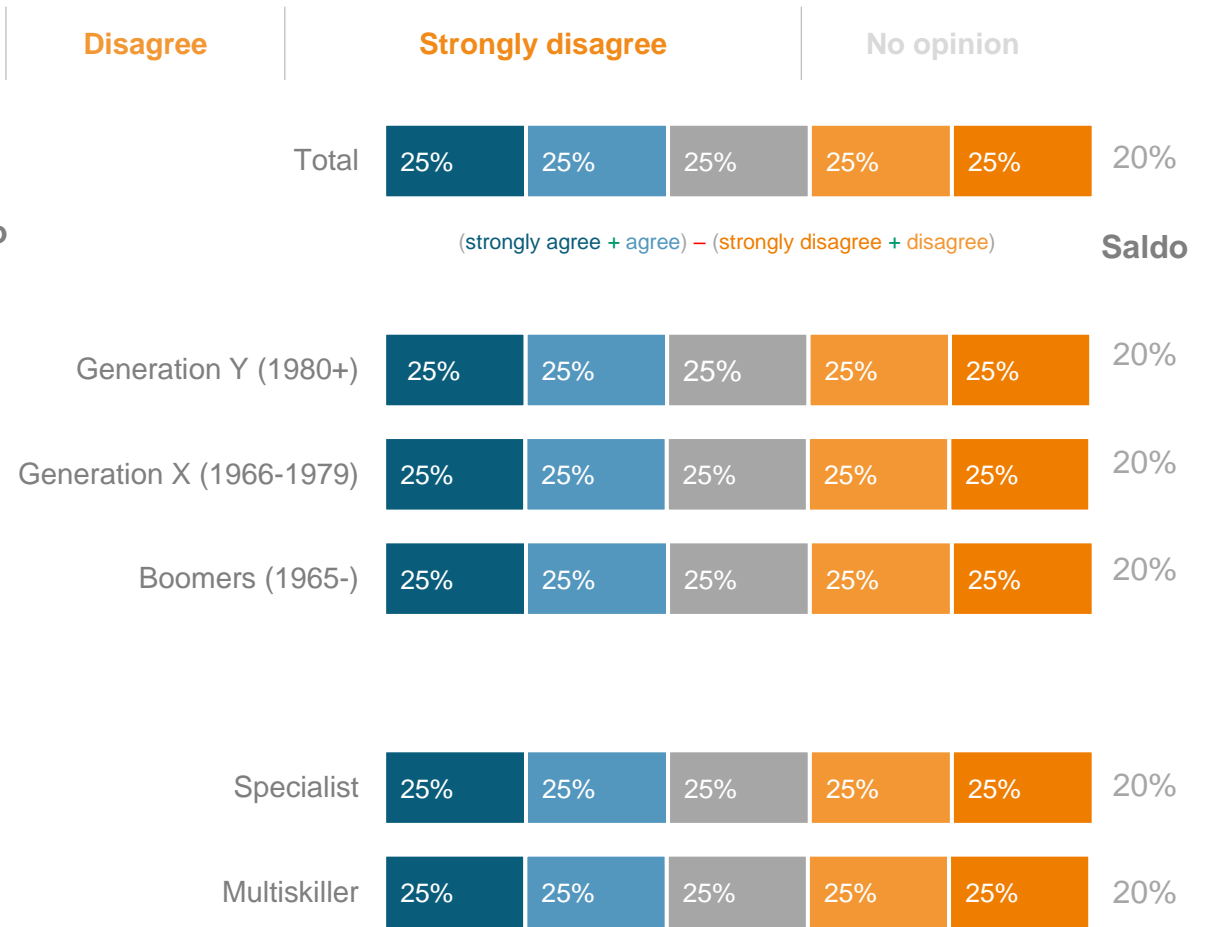
...Conclusion

STATEMENT

Branded products have a technical advantage than private labels. *[read out]*



N=687; France N=105; Germany N=93; Italy N=94; Netherlands N=101; Poland N=83 Spain N=100; United Kingdom N=110

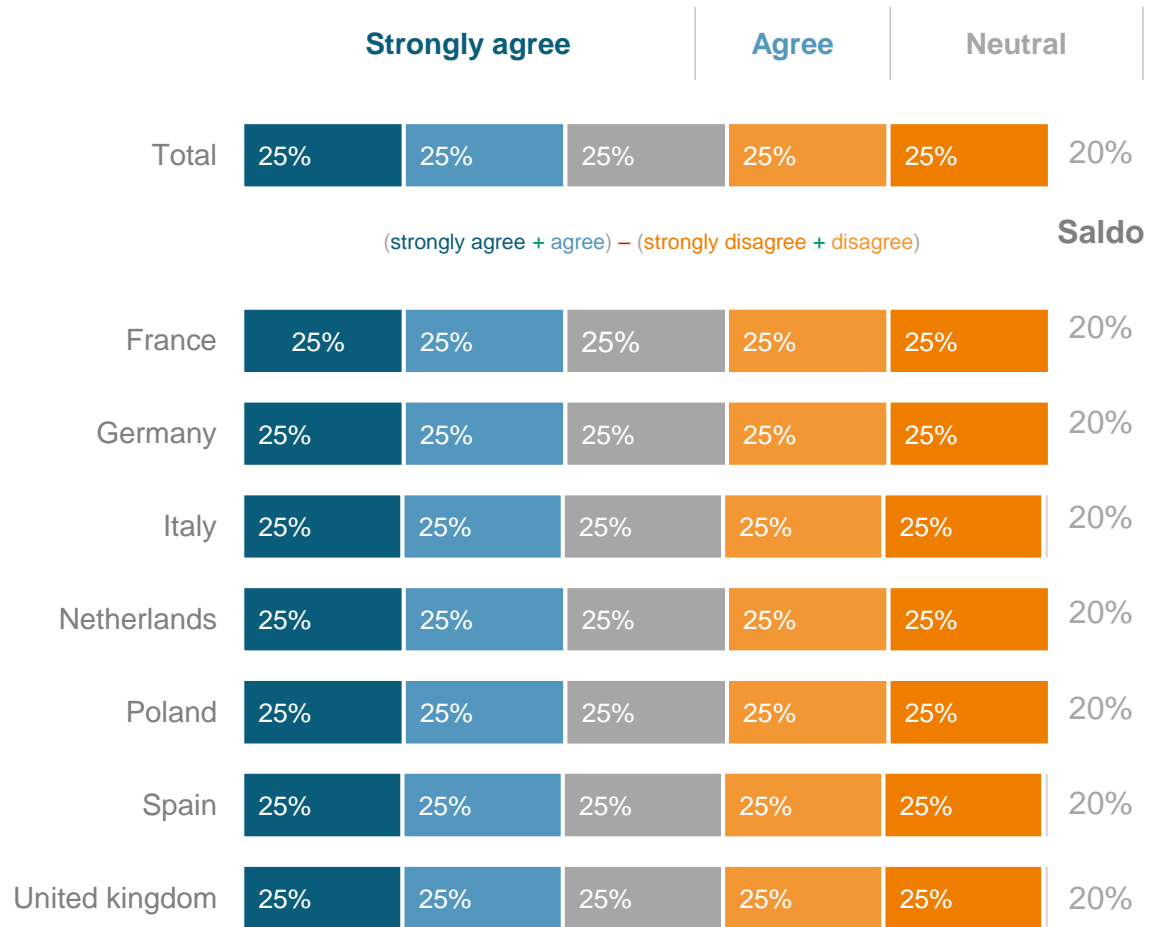


Generation Y N=274; Generation X N=341; Baby boomers N=93; Specialist N=174; Multiskiller N=529

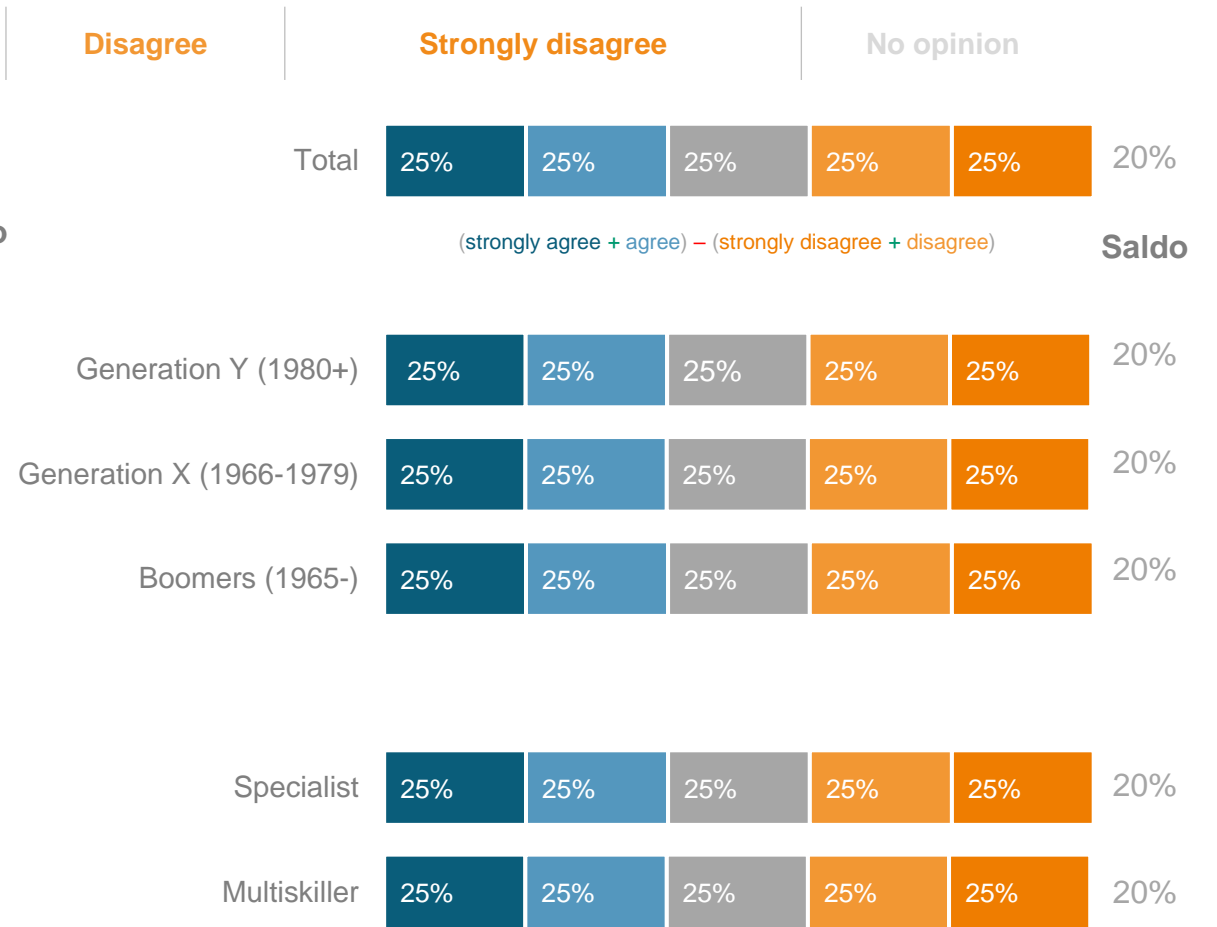
...Conclusion

STATEMENT

Branded products are more innovative than private labels. *[read out]*



N=687; France N=105; Germany N=93; Italy N=94; Netherlands N=101; Poland N=83 Spain N=100; United Kingdom N=110



Generation Y N=247; Generation X N=338; Baby boomers N=92; Specialist N=174; Multiskiller N=429

...Conclusion

Other provided services

Let's imagine you are searching for a product from a certain brand, but your usual wholesaler/ distributor does not have that brand at the moment. What will you do in general when it comes to this? *[read out]*

Total	France	Germany	Italy	Netherlands	Poland	Spain	United Kingdom
Buy similar product, other brand, same wholesaler	20%	20%	20%	20%	20%	20%	20%
Go to another builders merchant	20%	20%	20%	20%	20%	20%	20%
Search product online	20%	20%	20%	20%	20%	20%	20%
Search product at DIY store	20%	20%	20%	20%	20%	20%	20%
Other, namely	20%	20%	20%	20%	20%	20%	20%
No opinion	20%	20%	20%	20%	20%	20%	20%

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Key insights

Background research

Buying behaviour

Private label vs. branded products

General

Product group specific

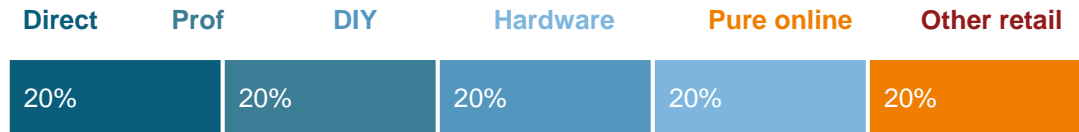
Brand funnel



Product group specific

Purchase channel

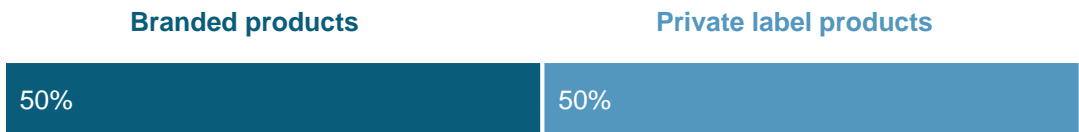
Where do you mainly buy your ... [product group]? *[read out]*



N=229

Share of branded products vs. private labels

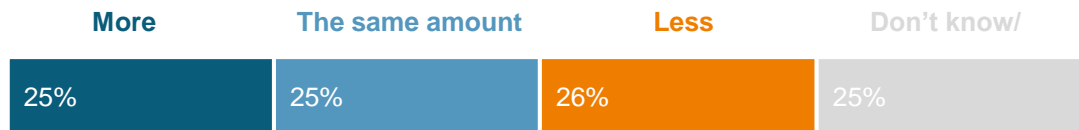
Approximately what share of the products you buy are? *[read out]*



N=228

Future usage of private labels

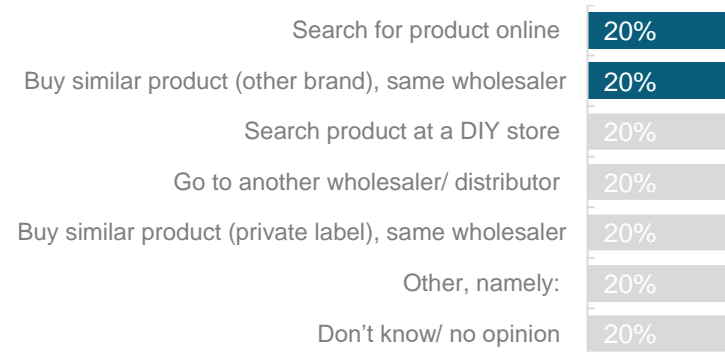
Do you expect to buy more or less private labels in the upcoming 3 years of your [product group]? *[read out]*



N=229

Brand vs channel loyalty

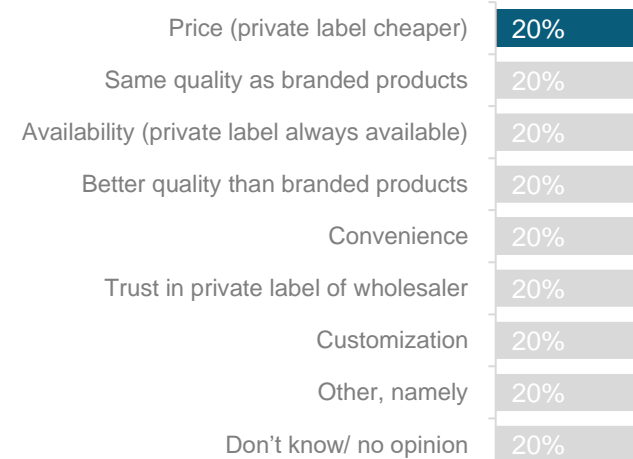
Imagine, you are searching for a [product group] from a certain brand, but your usual wholesaler does not have that brand. What will you do in general when it comes to this? *[read out]*



N=226

Buying reasons private labels

What are your reasons for buying private labels? *[spontaneous]*



N=47

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Key insights

Background research

Buying behaviour

Private label vs. branded products

Brand funnel



THE BRAND FUNNEL

A frequently used marketing tool has been reported for each country: ‘the brand funnel’. This model shows the level of spontaneous brand awareness, brand usage and being the ‘most used brand’. As such, this model gives a detailed overview of the key players per country, for specific products used by handymen.

For any relevant manufacturer, it is key to first create (spontaneous) awareness among handymen. Once a handyman knows the brand, it should be used. The final step is that when a handyman uses several brands, there will always be one predominant brand that is used more than others. The handyman is more likely to buy this brand again next time.

In this report the brand funnel has been constructed for the top-5 brands per product group in each country. One important point for interpretation is that all questions have been asked unprompted; the handyman was not prompted to name any specific brand. Instead, the handyman could only spontaneously mention the brands that came to his mind.

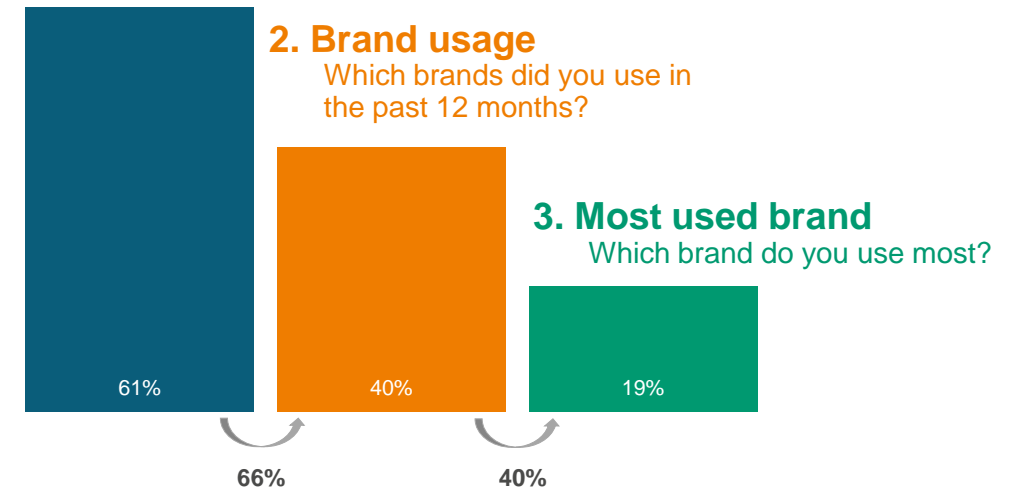
PRODUCT GROUPS INCLUDED

- | | |
|---|--------------------------|
| 1. Adhesives | 7. Insulation materials |
| 2. Sealants | 8. Floor covering |
| 3. Masking tapes | 9. Sanitary products |
| 4. Interior wall paints | 10. Switches and sockets |
| 5. Lacquers | |
| 6. Façade exterior cladding (e.g. panels) | |

HOW TO READ THE RESULTS

1. Spontaneous awareness

Which brands do you know?



Conversions

The ratios below the graph indicate the conversion; which share of the handymen that know a brand also uses that brand? A low percentage indicates a major drop out, and that action is required.

Product group IN Country XX

HANDYMAN INSIGHT MONITOR 2024

METHODOLOGY

3 QUESTIONS WERE ASKED TO PROFESSIONAL HANDYMEN ...

1. Spontaneous awareness

Which brands do you know?

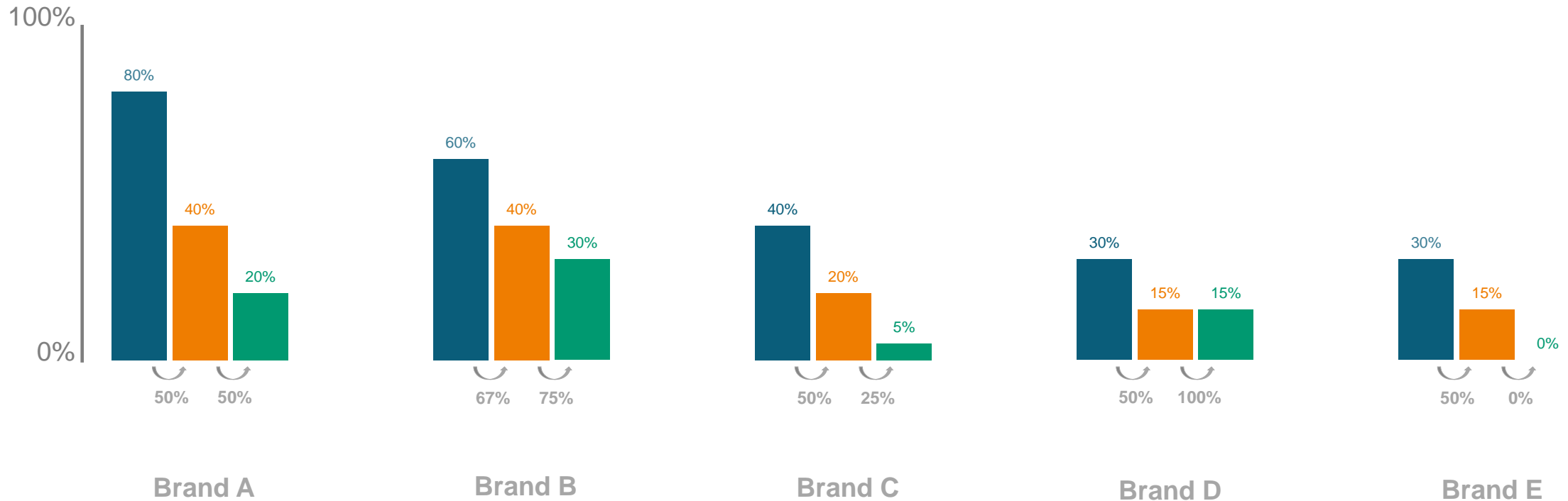
2. Brand usage

Which brands did you use in the past 12 months?

3. Most used brand

Which brand do you use most?

RESULTS FOR THE MOST MENTIONED BRANDS



USP Marketing Consultancy

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