



CORPORATE PRESENTATION

USP Marketing Consultancy

1 Formation and early years

2 Activities & Challenges

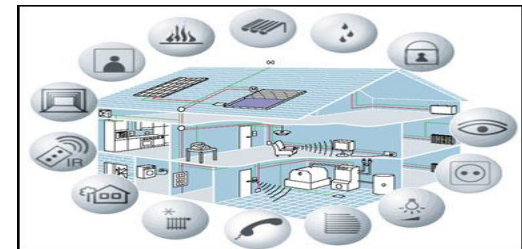
3 Types of research & Typical assignments

4 Clients

5 Organisation

6 USP's of USP

- USP Marketing Consultancy was incorporated in 1993. In the beginning, USP involved in a broad range of activities (FMCG, ICT and construction). In the vision of the incorporators, market specialisation was necessary not only to provide information to clients, but also to give advice on the basis of research data.
- During 1994, a choice of settlement was made for the construction & installation industries, because:
 - Not much of the research was done in these fields
 - There was a great deal of demand for both; market research & marketing
 - The absence of a specialized form of market research agencies in the fields of construction and installation
- USP has rightly made a name for itself with various multi-client surveys (Paint Industry Monitor, Renovation Monitor, Corporation Construction Plans, Self-Employed Persons (ZZP) Monitor, Sanitary Fittings Monitor, etc.). Many monitoring clients also started using the services of USP for exclusive surveys. Currently, these exclusive surveys generate 90% of the total turnover.
- In the late 1990s, USP expanded its operations from the construction and installation sectors into home decorating, real estate and DIY markets. At present, USP is continuously carrying out surveys not only for most of the big players, but also for aspiring small players (i.e. manufacturers, trade organisations, retail, publishers and trade associations) from the construction, installation, DIY and the real estate sector as well.





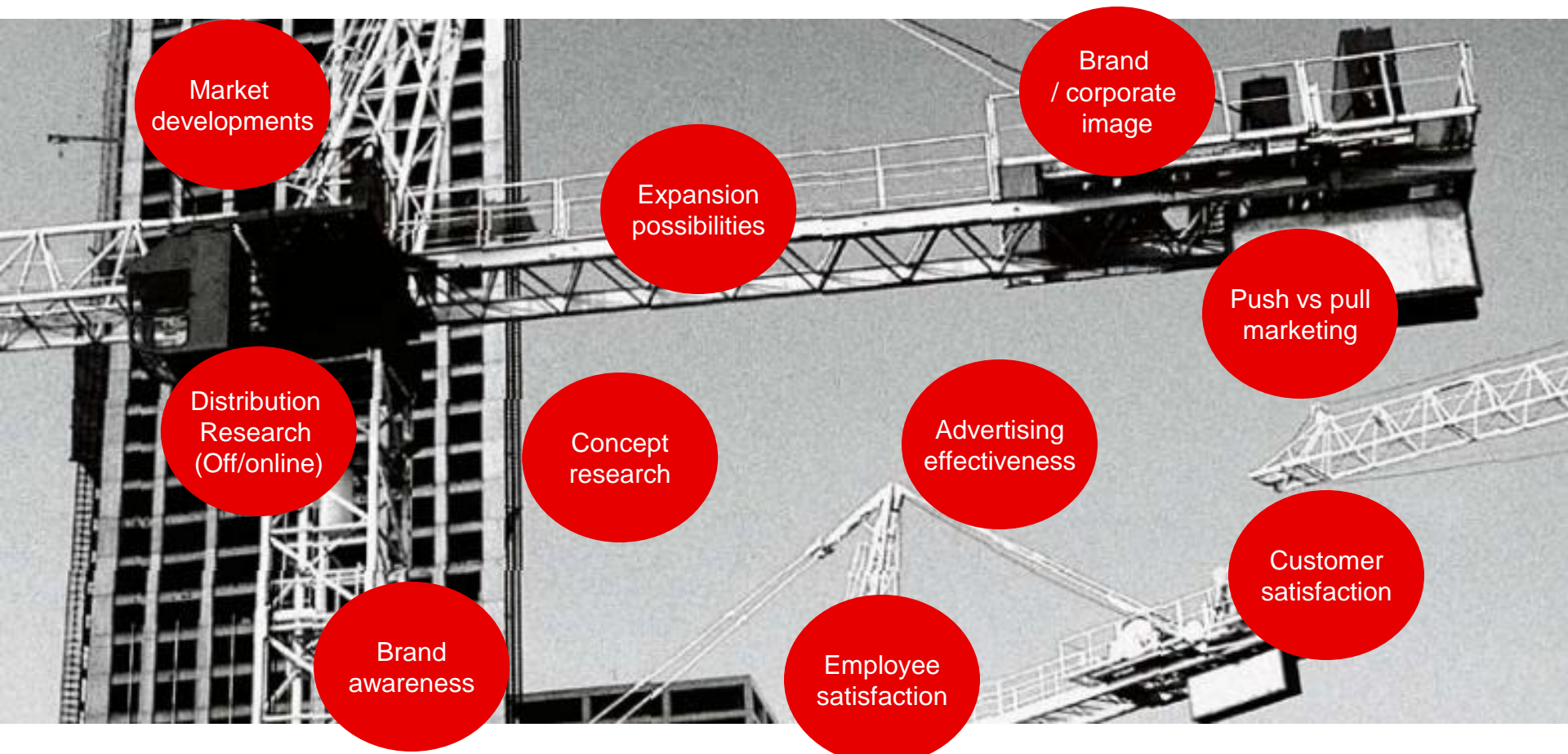
Primary Objective

- *Consultancy based on solid and substantiated information.* Conducting reliable research is the basis for good advice. Besides the expertise in conducting trustworthy market research, USP also has the market awareness to be able to translate research results into practical advices towards customers.

Consequences of being a market specialist:

- USP has a clear market specialisation and is a **full service agency** within this specific field. USP has all the in-house research tools under its own management. Here are the types of research USP conducts under its own management:
 - **Quantitative** (by phone, written, on-line, face-to-face) and **Qualitative** (focus groups, in-depth interviews)
 - **All research types** that arise from the marketing management process (see next page)
 - **National & International** (30% of the turnover is generated by international research)
 - **BtB** research and **BtC** research
- Beside involvement in the research field, the managing partners of USP are also co-founders of BouwKennis.nl (multimedia knowledge platform for commercial policy makers in the construction and installation industry), WoonKennis.nl, **BauInfoConsult** (research agency focused on construction and installation in Germany) and **Arch-Vision** (European Architectural Barometer, which monitors economic development and trends among 1.200 architects every quarter since 2009 in Germany, France, Italy, Spain, the Netherlands and UK).
- At the end of 2003, USP took the initiative to establish the Construction Marketing Platform, to which 30 marketers from the construction and installation supply industry, are affiliated to meet 6 times per year. Furthermore, the establishment of Commercial Real Estate Platform involved other related parties from the real estate sector, the Installation Marketing Platform and the DIY Marketing Platform as well.





Construction



Civil



Installation & Energie



DIY/Decorating



Finishing



Sector organizations



Real estate & Housing



Recent International Research projects



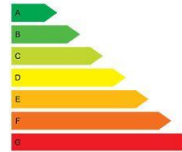
Identify product use in 25 European countries
Desk research
ABB, 2011



Trends study & product basket
Poland, Germany, Austria,
Netherlands, Switzerland,
Qualitative and quantitative
Hilti 2011



Brand funnel research UK,
Germany, Netherlands, Denmark,
France. B-t-B & B-t-C,
Phone & online. 8,000 interviews,
PPG, 2011



New installation opportunities
Netherlands, Belgium & UK,
Quantitative, 2,000 interviews by
phone
DNV 2010/2011



Quantitative Brand image study,
10 countries (incl VS & China)
2.000 interviews by phone
Trespa, 2007 & 2010



Trend research among installers
& consumers. Italy and UK (online
and by phone; 1.200 interviews
Ideal Standard, 2011



Segment study 11 countries
Desk & Qualitative research
Rockwool, 2011



Quarterly research in 6 countries
(D, F, I, E, NL and UK) among
1,200 architects
New product of USP, 2009

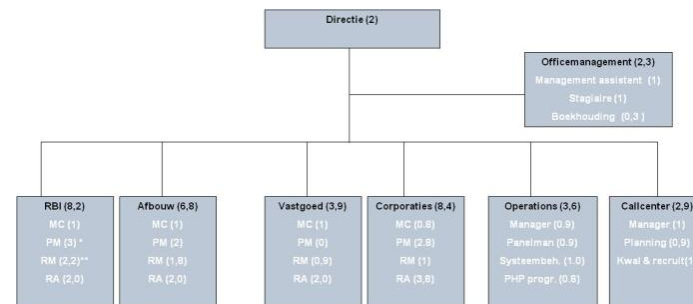


Brand awareness & Image study
Belgium, Netherlands & UK
Quantitative research by phone
among architect & contractors
Icopal, 2011



Customer Satisfaction Research
15 countries (whole Europe),
4.500 interviews by phone among
installers, contractors and traders
Wavin, 2011

- Up and until now, USP is an independent company. USP employs a total of 44 persons, 35 of whom are researchers and consultants. The employees come from various disciplines, such as business economics, psychology, sociology, business administration, industrial design, etc. Knowledge of the market is essential for the employees due to the overall market specialisation. Many of these researchers and consultants have been working at USP for a long time indeed.



- Being market specialist, USP has a full-service strategy. For this reason, USP has its own call center, with agents who speak the language of the market (50 fully automated workplaces with research software that allows surveys to be conducted in 20 countries at a time). USP has its own research panels (www.deeluwmening.nl with 10,000 consumers and www.bouwpanel.nl with approximately 17,000 construction professionals), rooms where focus groups can be audio-visually observed from a distance, and utilizes ICT facilities for on-line research.



- Subsidiaries and products of USP include:



1. Market specialisation leads to in-depth research
2. No data, but information and advice
3. Through specialisation benchmark / perspective
4. Own extended network (we Know the decision-makers)
5. We open our network to clients
6. Discussion partner instead of merely a follower
7. A promise is a promise
8. No nonsense
9. Full obligation to provide results
10. We won't finish until the client is completely satisfied