

Market Size

Total Addressable Market (TAM):

Customers/Users: 105M - 105M

Revenue: €29.3B - €104.7B

Serviceable Addressable Market (SAM):

Customers/Users: 7.7M - 7.7M

Revenue: €2.2B - €7.8B

Executive Summary

The Total Addressable Market (TAM) for Handy's handyman services in the European Union is estimated to range between €29.3 billion and €104.7 billion, with a potential customer base of 105 million households. The Serviceable Addressable Market (SAM), based on Germany's market share of 7.4%, is estimated to be between €2.2 billion and €7.8 billion, with a potential customer base of 7.7 million households.

The handyman services market in Europe is expected to grow at a remarkable rate during the forecast period from 2023 to 2030, driven by increasing demand for outsourced home improvement and maintenance services. Europe holds a significant market share of 24.4% in the global handyman services industry, with Germany accounting for 7.4% of the European market.

Key competitors in the European handyman services market include Smith Handyman Service, Handyman Services London, Honest Handyman Service, Mr. Handyman, Ace Handyman Services, TaskRabbit, and Fantastic Services, among others. The market is characterized by a wide range of service offerings, including plumbing, electrical work, carpentry, painting, and general maintenance. Pricing varies across regions, with average hourly rates ranging from €35 to €125.

The European market is influenced by trends such as the growing use of technology to support handyman services, the rising popularity of outsourcing home improvement projects, and an increasing focus on sustainability and energy efficiency in home renovations. Additionally, the EU's "Right to Repair" directive and the development of a voluntary European quality standard for repair services are expected to further promote the handyman services market.

Key Data Points

- Approximately 197.4 million households in the EU as of 2021 [1][11][30]
- An average of 53% of households outsourced home improvement projects in 2020 [22]
- The handyman services market in Europe is expected to grow at a CAGR between 2023-2030 [18]
- The DIY & hardware store market in Europe is projected to grow 2.7% from 2024-2028 [25][43]
- Average hourly rate for handyman services in Europe ranges from €35-125 [48]
- Germany's handyman services market share in 2023 is 7.4% [8]

Market Size Calculations

TAM:

Total Addressable Households = 197,400,000 [1][11][30]

Percentage Outsourcing Handyman Services = 53% [22]

Average Annual Hours per Household = 8 (assumption)

Average Hourly Rate (Low) = €35 [48]

Average Hourly Rate (High) = €125 [48]

TAM (Low) = $197,400,000 * 53% * 8 * €35 = €29,326,560,000$

TAM (High) = $197,400,000 * 53% * 8 * €125 = €104,737,000,000$

SAM:

SAM is based on the 7.4% market share of Germany [8], as a proxy for Handy's obtainable market share.

SAM (Low) = €29,326,560,000 * 7.4% = €2,170,165,440

SAM (High) = €104,737,000,000 * 7.4% = €7,750,538,000

Assumptions

Key assumptions:

The 53% of households that outsourced home improvement in 2020 is representative of the ongoing trend [22]. This is a reasonable assumption as the data point is recent and likely reflects current consumer behavior.

Each household that outsources handyman services does so for an average of 8 hours per year. This assumption is made to estimate the potential revenue per household. While not directly supported by the data, 8 hours per year (less than 1 hour per month on average) seems a conservative and realistic estimate for household handyman needs.

The average hourly rate is assumed to remain constant, ranging from €35 to €125 [48]. This is supported by the provided data and allows for a realistic range in the TAM and SAM calculations.

Proxy data:

The DIY & hardware store market size and growth is used as a proxy for the overall handyman market [25][43]. This is a reasonable proxy as the DIY market includes products and services related to home improvement and maintenance, which overlaps significantly with the handyman services market. The growth rate of 2.7% from 2024-2028 for the DIY market is assumed to be representative of the growth in the handyman market.

Germany's handyman services market share of 7.4% in 2023 [8] is used as a proxy for Handy's obtainable market share (SAM). As Germany is a major European market, its share serves as a conservative and realistic estimate for the market share a single company like Handy could potentially capture across Europe.

Methodology

To calculate the Total Addressable Market (TAM) and Serviceable Available Market (SAM) for a handyman service in Europe, we followed a structured approach by gathering relevant data points, making reasonable assumptions, and utilizing proxy data where necessary.

First, we identified the key data points required for the calculations:

- Total number of households in Europe: Approximately 197.4 million households in the EU as of 2021 [1][11][30].
- Percentage of households that outsource home improvement/handyman services: An average of 53% of households outsourced home improvement projects in 2020 [22].
- Average spending per household on handyman services: Assuming an average of 8 hours of handyman services needed per household annually, at an average hourly rate ranging from €35 to €125 [48].
- Market growth rate for handyman services in Europe: The handyman services market in Europe is expected to grow at a CAGR between 2023-2030 [18]. As a proxy, the DIY & hardware store market (related to home improvement and maintenance) is projected to grow at 2.7% from 2024-2028 [25][43].

To calculate the TAM, we made the following assumptions:

- The 53% of households that outsourced home improvement in 2020 is representative of the ongoing trend [22].
- Each household that outsources handyman services does so for an average of 8 hours per year (a conservative and realistic estimate).
- The average hourly rate remains constant, ranging from €35 to €125 [48].

Using these assumptions and data points, we calculated the TAM as follows:

TAM (Low) = 197,400,000 households * 53% * 8 hours * €35/hour = €29,326,560,000

TAM (High) = 197,400,000 households * 53% * 8 hours * €125/hour = €104,737,000,000

To estimate the SAM, we used Germany's handyman services market share of 7.4% in 2023 [8] as a proxy for the obtainable market share across Europe, assuming a single company like Handy could potentially capture a similar share.

SAM (Low) = €29,326,560,000 * 7.4% = €2,170,165,440

SAM (High) = €104,737,000,000 * 7.4% = €7,750,538,000

In summary, the TAM for a handyman service in Europe is estimated to range from €29.3 billion to €104.7 billion, while the SAM is projected to be between €2.2 billion and €7.8 billion, based on the assumptions and data points provided.

It's important to note that these calculations are rough estimates and may vary depending on the accuracy of the data points and the validity of the assumptions made. Additionally, factors such as market dynamics, competition, and consumer behavior can influence the actual market size and potential market share.

Competitor Research Summary

Amazon.com, Inc.:

Amazon.com, Inc. is a major player in the home services market in Europe. While specific revenue figures for their home services division in Europe are not provided, the company's overall presence in the market is significant [59].

CleanWhale GmbH:

CleanWhale GmbH is listed as one of the top competitors in the home services market in Europe for 2023 [59]. However, no specific revenue or market share data is provided for this company.

Rentokil Initial plc:

Rentokil Initial plc is mentioned as a key player in the home services market in Europe [59]. The company offers various home services, but specific revenue figures for their European operations are not provided in the given data.

Rollins, Inc.:

Rollins, Inc. is listed among the top competitors in the European home services market [59]. However, no specific revenue or market share information is available for their European operations.

Dwyer Franchising LLC (Drain Doctor):

Dwyer Franchising LLC, operating as Drain Doctor in Europe, is mentioned as a significant player in the home services market [59]. However, no specific financial data or market share information is provided for this company.

Aquevo:

Aquevo is listed as one of the top competitors in the home services market in Europe for 2023 [59]. However, no specific revenue or market share data is available for this company.

1st Online:

1st Online is mentioned as a key player in the European home services market [59]. However, no specific financial or market share information is provided for this company.

Additional competitors in the European market:

Unilever plc:

Unilever plc is mentioned as a key player in the Europe home services market in 2023 [63]. However, no specific revenue or market share data is provided for their home services division.

Henkel AG & Co. KGaA:

Henkel AG & Co. KGaA is listed as one of the key players in the Europe home services market [63]. No specific financial data is

provided for their home services operations.

The Procter & Gamble Company:

The Procter & Gamble Company is mentioned as a significant player in the European home services market [63]. However, no specific revenue or market share information is available for their home services division in Europe.

Reckitt Benckiser Group plc:

Reckitt Benckiser Group plc is listed among the key players in the Europe home services market [63]. No specific financial data is provided for their home services operations in Europe.

Kimberly-Clark Corporation:

Kimberly-Clark Corporation is mentioned as one of the key players in the European home services market [63]. However, no specific revenue or market share information is available for their home services division in Europe.

Market Overview:

The Europe home services market reached a size of USD 113.08 billion in 2023 and is expected to grow at a CAGR of 7.7% between 2024 and 2032, reaching approximately USD 221.47 billion by 2032 [60][65]. Europe holds over 28% of the global home services market share [62].

The handyman services market in Europe is expected to hold a market share of 24.40% during the forecast period [64]. Germany holds a market share of 7.40% in 2023 [64]. The handyman services market in the United Kingdom is expected to grow at a CAGR of 17.10% from 2023 to 2033 [64].

The European Maintenance, Repair, and Operations (MRO) market was valued at nearly USD 126.18 billion in 2023 and is expected to grow at a CAGR of 1.7% between 2024 and 2032 [61].

Summary of Collected Data

Financial Data

Total number of households in the European Union:

- Approximately 197.4 million households in 2021 [1]

Percentage of households conducting DIY jobs:

- Approximately 44% of households in Europe conducted DIY jobs in 2017-2018 [2]

Consumer spending on household upkeep:

- Forecast to increase by 177.7% between 2024 and 2029 [3]

Home improvement spending:

- Forecasted at 91 billion euros in the third quarter of 2018 [4]

Number of SMEs in the European Union:

- Micro-sized enterprises (0-9 employees): 22.82 million [5]
- Small-sized enterprises (10-49 employees): 1.32 million [6]
- Medium-sized enterprises (50-249 employees): 202,278 [6]

Employment by SMEs in the European Union:

- SMEs employed around 84.75 million people in 2023 [7]

- Small-sized businesses employed 25.5 million people [7]

European handyman market share:

- Europe market share in 2023: 24.40% [8]
- Germany market share in 2023: 7.40% [8]
- United Kingdom market CAGR (From 2023 to 2033): 17.10% [8]

Number of handyman service businesses:

- 525,824 handyman service businesses in the United States as of 2024 [9]

Number of households in European countries:

- Germany: approximately 41 million households in 2021 [28]
- France: 31 million households in 2021 [28]
- Italy: 25.8 million households in 2021 [28]

Construction industry revenue:

- The construction industry in the European Union had a revenue of approximately 2.1 trillion euros in 2022 [15]

Handyman services market growth:

- Expected to reach a value of \$1.8 billion by 2033 in the United States [14]
- Compound annual growth rate (CAGR) of 16.5% from 2023 to 2033 [14]

Home renovation market growth:

- The building renovation market in Europe is estimated to increase by 55.6 billion U.S. dollars from 2021 to 2026 [23]

DIY & Hardware Store market growth:

- Projected to grow by 2.70% from 2024 to 2028 [25]
- Expected to result in a market volume of US\$423.40 billion in 2028 [25]

Leading DIY retailers in Europe:

- France's Groupe Adeo: annual turnover of 21 billion euros [26]

Homeownership rate in Europe:

- About 69% of the population in Europe lives in an owner-occupied home [36]

Housing stock in European countries:

- Germany had the largest housing stock with approximately 43 million housing units in 2022 [40]

Handyman services market size:

- Projected to reach a volume of US\$423.40 billion by 2028 in Europe [43]
- Growth rate of 2.70% from 2024 to 2028 [43]

Solar installations growth:

- Almost 17 million more European homes were powered by solar in 2023 [44]
- 40% growth in solar installations from 2022 to 2023 [44]

Average annual household spending:

- In Germany, approximately 52.1 billion euros was spent on furniture, home furnishings, carpets, and other floor coverings in 2022 [49]

Outsourcing market spend per employee in Europe:

- Business Process Outsourcing (BPO) Market: projected to reach US\$283.70 per employee in 2024 [50]
- Application Outsourcing Market: projected to reach US\$92.09 per employee in 2024 [51]
- IT Outsourcing Market: projected to reach US\$422.20 per employee in 2024 [52]
- IT Outsourcing Market in Eastern Europe: projected to reach US\$41.65 per employee in 2024 [53]

Behavioral Data

DIY and Home Improvement Behavior:

- In 2017-2018, approximately 44% of households in Europe conducted DIY jobs, which includes handyman services [2].
- An average of 53% of households outsourced home improvement projects in 2020 [22].
- Half of European consumers engage in DIY tasks because they enjoy it, while about one quarter do so because it is more affordable than hiring professionals. France, Poland, and the UK have the most enthusiastic DIY consumers [26].

Home Improvement Spending:

- In the third quarter of 2018, home improvement spending in Europe was forecasted at 91 billion euros [24].
- The DIY & Hardware Store market in Europe is projected to grow by 2.70% from 2024 to 2028, resulting in a market volume of US\$423.40 billion in 2028 [25].
- France's Groupe Adeo is the largest DIY retailer in Europe, with an annual turnover of 21 billion euros. The UK's Kingfisher plc is another significant player in the market [26].

Household Composition and Housing:

- In 2023, 23.8% of households in the EU included children, while 76.2% did not [27].
- Couples accounted for 63.6% of households with children in the EU, making them the most common type [27].
- Single parents made up 12.4% of households with children, with the highest proportions in Estonia, Lithuania, and Latvia (all above 25%) [27].
- Almost half (48.9%) of households with children in the EU had one child, while 38.2% had two children, and 12.9% had three or more children [27].
- Approximately 70% of EU residents own their homes, while the remaining 30% rent [37][39].
- In 2022, 52% of the EU population lived in houses, and 47.5% lived in flats [38].

Home Renovation and Maintenance:

- From 2021 to 2026, the building renovation market in Europe is estimated to increase by 55.6 billion U.S. dollars [23].
- 85% of EU buildings were built before 2000, and an estimated 75% of these have poor energy performance [35].
- Almost 17 million more European homes were powered by solar in 2023, marking a 40% growth in solar installations from 2022 [44].

Outsourcing Trends:

- The IT Outsourcing market in Europe is projected to grow by 8.23% from 2024 to 2029, resulting in a market volume of US\$262.00 billion in 2029 [54].
- The Business Process Outsourcing (BPO) market in Europe is projected to grow by 4.32% from 2024 to 2029, resulting in a market volume of US\$146.50 billion in 2029 [55].
- In 2023, 73.3% of SMEs in the European Union had a website [57].

Handyman Services Market:

- The handyman services market in Europe is expected to grow at a remarkable CAGR during the forecast period from 2023 to 2030 [18].
- Europe holds a significant market share in the global handyman services industry [18].

Household Spending:

- The average annual household spending on furniture, home furnishings, carpets, and other floor coverings in 2022 was approximately 52.1 billion euros in Germany, which recorded the highest expenditure [49].

Competitor Data

Market Size and Growth:

- The Handyman Services Market is expected to grow at a remarkable CAGR during the forecast period from 2023 to 2030 [18].
- The DIY & Hardware Store market in Europe is projected to grow by 2.70% from 2024 to 2028, resulting in a market volume of US\$423.40 billion in 2028 [25].
- The handyman services market in Europe is expected to reach a volume of US\$423.40 billion by 2028, with a growth rate of 2.70% from 2024 to 2028 [43].

Competitive Landscape:

- Key players in the market include Smith Handyman Service, Handyman Services London, Honest Handyman Service, LS Handyman Singapore, Mr. Handyman, Shawn's Handyman Service, A1 Handyman Singapore, Doug's Service & Repair, Everyworks, Helping, Omaha Handyman Service, House Doctors, Black Rock Handyman Service, Hunter's Handyman Service, Ace Handyman Services, TaskRabbit, Porch, Handyman Connection, Aspect Maintenance Services, Fantastic Services, Cities Handyman Service, LJS Handyman, HandyPro, and Kusiak Construction [18].

Market Share:

- Europe holds a significant market share in the handyman services industry [18].
- Europe Market Share in 2023: 24.40% [8]
- Germany Market Share in 2023: 7.40% [8]
- United Kingdom Market CAGR (From 2023 to 2033): 17.10% [8]

Service Offerings:

- Handyman services cover a wide range of tasks, including plumbing, electrical work, carpentry, painting, and basic maintenance [21].
- Services typically include general maintenance, home improvement, repair and installation, outdoor maintenance, and specialized services [10].

Pricing:

- The average hourly rate for a professional handyman is around \$55 (approximately €46) [21].
- In Barcelona, Spain, hourly rates are €25/hour, with half-day rates at €90 and full-day rates at €150 [45].
- In Munich, Germany, prices for specific projects range from €1,000 to €2,000 + tax [46].
- In Bratislava, Slovakia, various services range from €10 to €100 per task, with extra hours at €20/hour [47].
- General European rates for handyman services range from €35 to €125 per hour, depending on the contractor and location [48].

Market Trends:

- Increasing demand for handyman services across personal and commercial applications globally [18].

- Growing use of software and technology to support handyman services, such as job management, scheduling, and customer communication tools [19][20].
- Rising popularity of outsourcing home improvement projects, with an average of 53% of households outsourcing such projects in 2020 [22].
- Increasing focus on sustainability and energy efficiency in home renovations [35].

Customer Behavior:

- Half of European consumers engage in DIY tasks because they enjoy it, while about one quarter do so because it is more affordable than hiring professionals [26].
- France, Poland, and the UK have the most enthusiastic DIY consumers [26].
- In 2023, 23.8% of households in the EU included children, while 76.2% did not, which may influence the types of handyman services required [27].

Regulatory Environment:

- The EU has adopted a "Right to Repair" directive, making repair easier and more appealing to consumers [31][33].
- A voluntary European quality standard for repair services is being developed [32][34].
- Each EU member state must implement at least one measure to promote repair, such as repair vouchers, information campaigns, or support for community-led repair spaces [31].

Insurance Requirements:

- Civil liability and professional indemnity insurance is compulsory in some countries for construction sector services, including handyman services [42].
- Clients and agencies often require contractors to hold specific insurance covers, including employers' liability, public liability, and professional indemnity [41].

This competitor data provides a comprehensive overview of the handyman services market in the European Union, including market size, key players, pricing, trends, and regulatory factors.

Demographic Data

Total number of households in the European Union:

- Approximately 197.4 million households in the 27 member states of the EU as of 2021 [1][11][30].

Household composition:

- 23.8% of households in the EU included children, while 76.2% did not in 2023 [27].
- Couples accounted for 63.6% of households with children in the EU [27].
- Single parents made up 12.4% of households with children [27].
- Almost half (48.9%) of households with children in the EU had one child, 38.2% had two children, and 12.9% had three or more children [27].

Homeownership:

- Approximately 69% of the population in Europe lives in an owner-occupied home [36].
- Estimated number of homeowners: 136.3 million households.

Age distribution:

- In 2022, approximately 14.84% of the population were aged between 0 and 14 years, while 14.69% were aged 65 and above [16].
- The most common single year of age in Europe was 37 in 2022 [17].

Income distribution:

- The Gini index score for European Union countries in 2022 indicates a significant level of income inequality [12][13].
- The ratio of the income of the top 20% to the bottom 20% in the EU has decreased from 5.22 in 2015 to 4.74 in 2022 [13].

Geographic distribution:

- Germany had approximately 41 million households in 2021, France had 31 million, and Italy had 25.8 million [28].
- Slovakia had the highest average household size among EU member states, with 2.9 people per household in 2021 [29].

Housing types:

- In 2022, 52% of the EU population lived in houses, and 47.5% lived in flats [38].
- 16.8% of the EU population lived in overcrowded homes, and 33.6% lived in under-occupied homes in 2022 [38][39].

Home improvement and maintenance:

- An average of 53% of households outsourced home improvement projects in 2020 [22].
- The DIY & Hardware Store market in Europe is projected to grow by 2.70% from 2024 to 2028, resulting in a market volume of US\$423.40 billion in 2028 [25].

Small and Medium-sized Enterprises (SMEs):

- SMEs form the backbone of the European economy, with almost two-thirds of employees in the EU working for an SME [56].
- In 2023, 73.3% of SMEs in the European Union had a website [57].

Outsourcing trends:

- The IT Outsourcing market in Europe is projected to grow by 8.23% from 2024 to 2029 [54].
- The Business Process Outsourcing (BPO) market in Europe is projected to grow by 4.32% from 2024 to 2029 [55].

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- [62] <https://www.expertmarketresearch.com/reports/europe-home-care-market>
- [63] <https://www.futuremarketinsights.com/reports/handyman-service-market>
- [64] <https://www.expertmarketresearch.com/reports/europe-home-care-market>

User Inputs

Please enter the name of your business, product, or service

Handy

Please describe your business, product or service in as much detail as possible. This can include elements such as the main benefits you offer, costs, industry, etc. and helps make the TAM & SAM calculations more accurate.



Handyman, the statistics should be in euros.