

# Adaptable control helps overcome emotional barriers to switching



Qual

*Brand X suits my body well. The movement is not dangerous. That's why I don't change brands.*  
38 years old, Brand X

## Physical fit

The brand's operation feels tailored to their body

## Extension of self

The machine connects to mind and body

*My body has become too accustomed to Brand Y equipment. I can't use other brands. It can take months to adapt.*  
53 years old, Brand Y

## Resistance to switching

Changing brands feels like giving up a sense of self

## Immediate familiarity

They develop a sense of ownership over the brand itself

*My machine feels like it's become an extension of me. Leveling is done in a single pass, so my mind is at ease. It puts me in a good mood, too.*  
53 years old, Brand Y

*When I sit in the driver's seat, it feels familiar right away. Even though it's new, it feels like it's always been mine.*  
62 years old, Brand X

## Breaking the cycle:

Adaptable control makes new brands feel like home

I'm considering **Brand X** for my next machine. **Brand X levers** are light but much easier to adopt compared to **Brand Z**. The attachment compatibility is great—it works well no matter what you use. **Anyone can easily adapt** to it.

53 years old, Brand Y

# Financial, social, and cultural barriers make owners under 35 very rare



## Military service postpones career entry

Most men do not finish mandatory service until ages 24–26, delaying their start in the industry



## Permits and training are very expensive

Operator permits must be obtained through licensed trainers, which is costly even before investing in a machine



## Experience is needed before becoming a decision maker

New entrants typically spend years working for others before becoming an owner-operator



## Connections are essential to find work

The industry is a “closed shop,” so newcomers need to build personal networks before landing jobs



## Top-down, age-driven culture favors older operators

Seniority holds significant weight, limiting opportunities for younger professionals



## Privacy norms make age difficult to discuss

Directly asking about age can be intrusive, making younger recruits difficult to target

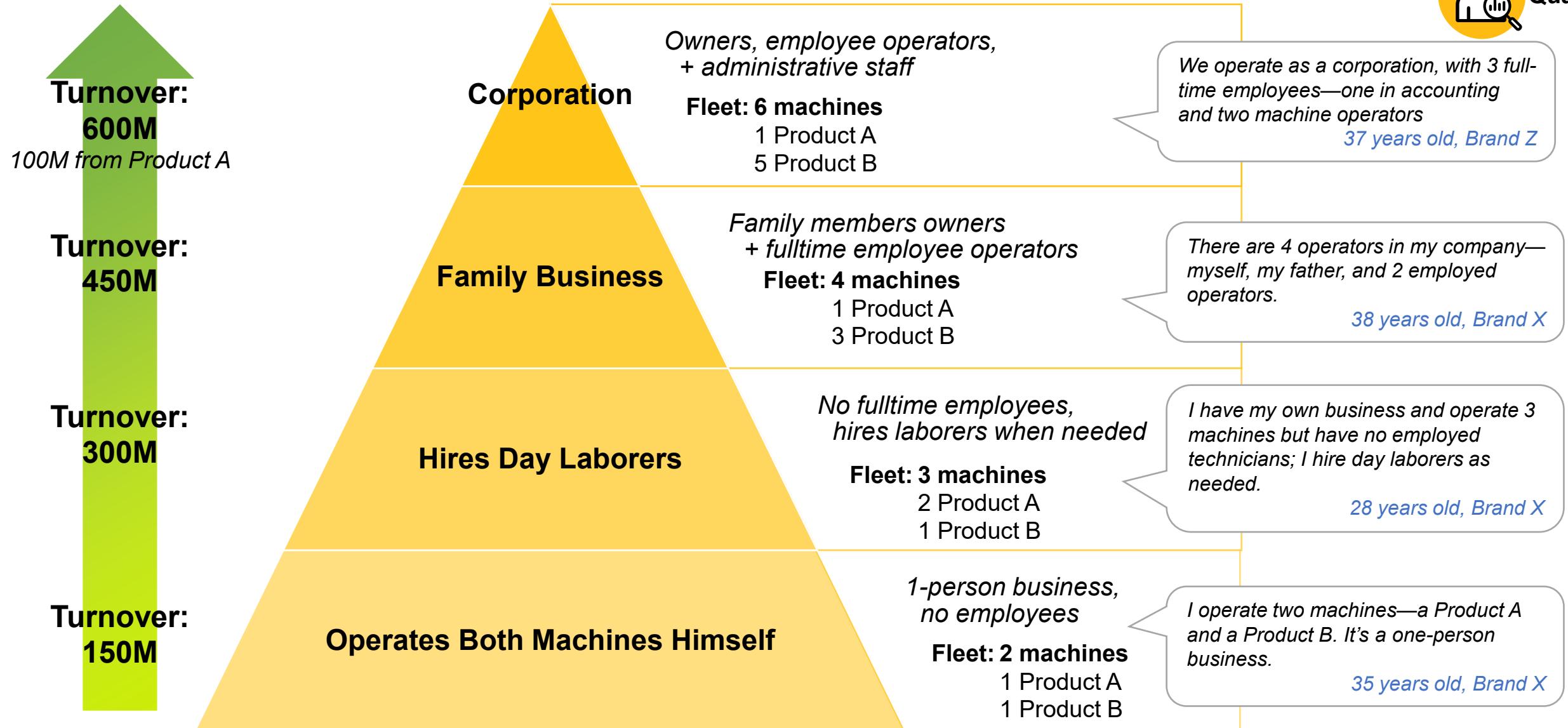
### How new operators gain experience:

- 90% would have started as entry-level workers under the supervision of seniors, often family members, uncles, or older classmates. A few may have also received training in engineering battalions during their military service.
- Once enough experience, contacts of their own, and capital, they set-up independently.

# Business models and revenue scale up with increasing fleet size



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# Owner-operator regional communities form relationships with dealers



## Shared offices provide mutual support

*I'm self-employed. I'm a member of the Owner-Operator Community in the region. It's a community where owner-operators come together to collaborate and support each other in their work. There are 7-9 members.*

*52 years old, Brand Y*

*I founded the local branch of the National Construction Machinery Association. We support operators through advocacy, training, networking, ensuring safety and fair practices.*

*55 years old, Brand X*

*When Brand Y comes to repair other people's equipment, we see them, so we have a familiar relationship.*

*52 years old, Brand Y*

## Reps educate collectives on new products

*Whenever new products are released, reps bring pamphlets to our community office.*

*52 years old, Brand Y*

*Since we always make group purchases, we are valued customers. Even after the warranty, they give us free repairs.*

*51 years old, Brand Y*

## Service visits reinforce familiarity and trust

## Exclusive deals push members to switch.

*The salesperson brought us pamphlets on Brand Y and offered me an exclusive deal. I switched brands because of the offer.*

*52 years old, Brand Y*

## Group purchasing offers better prices and perks

*The advantages of group purchasing include extended warranty and maintenance compared to others, better negotiation power on pricing, and more.*

*51 years old, Brand Y*

# Economic and government factors are driving uncertainty



**The country's construction sector shifts from development to maintenance**

**Government budget cuts and policy changes strain construction demand**

**Government and private work are indistinguishable to operators**

*Since the country has already completed its development, new development projects are rare, and only maintenance work is expected to emerge.*

*52 years old, Brand Z*

*Demand will decrease, mainly due to our president and the federal government's budget cuts.*

*35 years old, Brand X*

*In government construction projects, large construction companies subcontract to specialized firms, which then hire equipment like ours. The work I take on from these firms could be part of a government project or private development.*

*53 years old, Brand Y*

*Our country already has most of the basic infrastructure in place. Large-scale development projects will decline, shifting more toward maintenance and upkeep. As a result, our work will gradually diminish.*

*53, Brand Y*

*Our president had initiated private infrastructure projects as part of economic revitalization measures. However, these projects are stalled due to lack of funding. As a result, the construction industry is in a slump.*

*62 years old, Brand X*

*Specialized contractors win bids and call us for work, which could involve city, county, or private development projects. Since we don't know the details, we're often unaware of who issued the project.*

*35 years old, Brand Z*

# Falling demand and payment issues halt equipment purchases



Contractors are struggling to find work



Payment uncertainty deters operators from accepting available work



Financial uncertainties prevent equipment investments

*I haven't worked much this year—I've been almost idle. This year has been unusually difficult. Next year is expected to be even worse.*

58 years old, Brand W

*This year was my worst year. Currently there's hardly any construction going on. The situation improving depends on government policy.*

50 years old, Brand X

*Work from private development sometimes results in bankruptcy, leading to unpaid payments.*

53 years old, Brand Y

*My wife keeps telling me, 'Think carefully before taking jobs. Don't end up working for a company that won't even pay you.'*

58 years old, Brand W

*Although it's time for me to replace my equipment, high interest rates and lack of work are discouraging many like me from renewing their machinery. I usually replace my equipment every 7 years, but this time I might keep it longer.*

35 years old, Brand X