



European Home Improvement Monitor Q3 2024

Branding

About European Home Improvement Monitor

THE GOAL

To check and track the behaviour and trends in the European home improvement market. This is done 4 times per year, by means of 6.600 online interviews (per quarter) with consumers, divided over 11 major European markets.

THE RESEARCH TOPICS

Base part: European developments of the home improvement market: product category penetration, spending, moment of brand selection, etc.

Quarterly theme part topic in 2024:

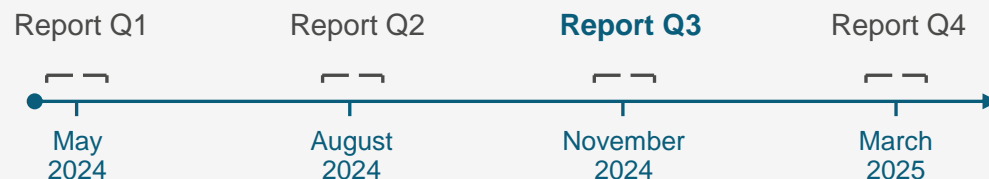
Q1: Needs & willingness to invest in sustainability

Q2: Purchase channels – Smart homes & products

Q3: Branding - Evolution of private labels

Q4: Do It Yourself or Do It For Me - Plans and expectations for next year

THE TIMELINE



COUNTRY SCOPE

600 online interviews per quarter per country among consumers
Annually, **26,400** successful online interviews

Background characteristics of the interviewed respondents can be found in the [appendix](#)

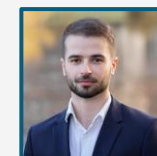
Insights are provided for **11** European countries



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WHY EUROPEAN HOME IMPROVEMENT MONITOR?



UNDERSTANDING THE CONSUMER

Digitalization, is rapidly changing the way consumers **orientate** and how they **purchase** home improvement products. This trend makes “pull marketing” much more important. The consumer becomes more and more decisive in the DMU.

The European Home Improvement Monitor provides key information on how consumers **orientate** themselves **on your category**. How digital are they and what are **differences by country**. Need-to-know Information which is vital for a good marketing strategy.



PARTNERSHIP

Our clients partner with us to implement trends and research questions in the monitor.

The European Home Improvement Monitor is a **co-makship** between our clients and USP. **Together we decide which trends to investigate**. Each quarter a key trend will be investigated and reported.

Knowing where, how and when these trends become relevant is **key market intelligence input** for **strategic decision making**.



CROSS-COUNTRY INSIGHTS

The European Home Improvement Monitor is conducted in **11 countries with the same methodology and questionnaire**. Not only the trends can be compared country by country, but also **by product category**.

Our customers are often Multi-national companies who need to receive comparable data for the countries in which they are active. We deliver a **cross-country comparison**.

This information is highly valuable to assess market conditions and sales feedback.

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Economic Developments

In this chapter, we explore quarterly spending trends on home improvement products, the broader economic outlook and consumers' home improvement plans:

- Share of households that have done a home improvement job
- European spending on labour and material
- European spending on products/material and labour

Respondents were asked:

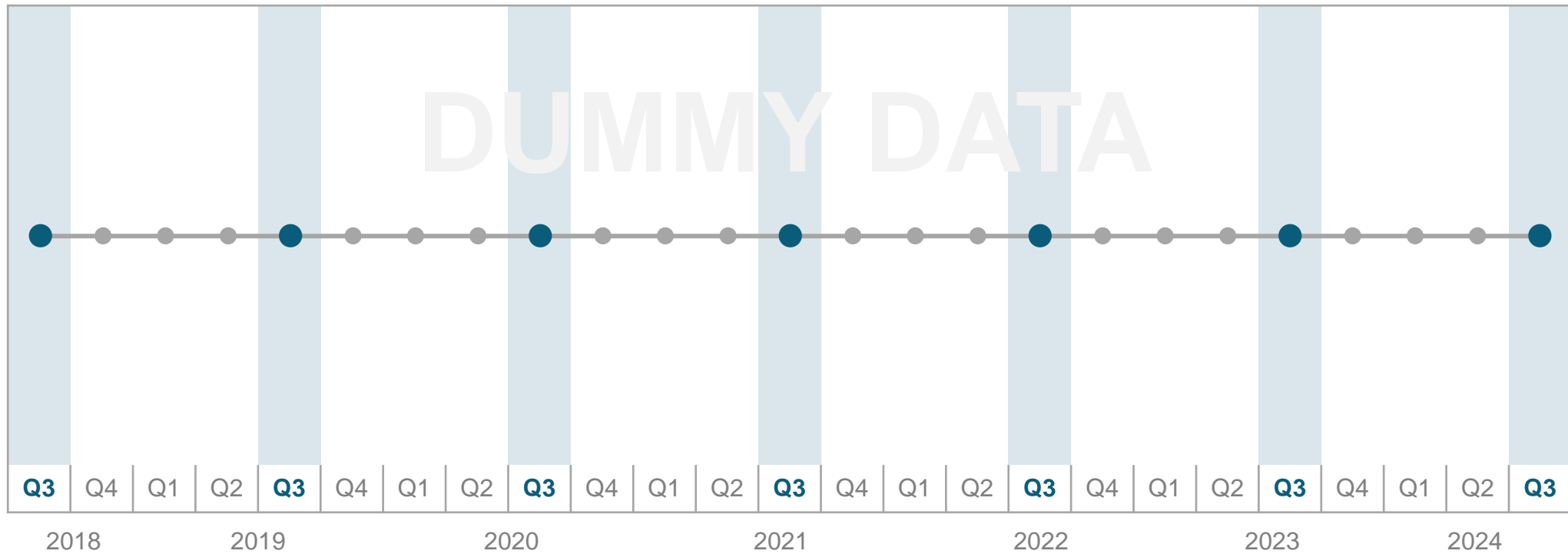
- To what degree do you expect to **spend more or less money** on home improvement in **October – December/in the next 12 months** compared to the same period last year?
- Do you feel this month is a **good or bad time** to start a project **over/under €5.000** for home improvement, repair or maintenance?
- Are you **planning to start** a home improvement, repair or maintenance project **in the next 30 days**?
- Do you feel this is a **good or bad time** to **hire a professional** for home improvement, repair or maintenance?
- **In the last 30 days**, have you **postponed or cancelled** a home improvement, repair or maintenance project you planned to start?
- Do you have plans to **move** within **the next 12 months**?
- Looking forward to the months **October – December/the next 12 months**, do you expect the **number of home improvement jobs** in- or outside your home to be **more, the same or less** than the same period last year?
- Why did you **postpone or cancel** your home improvement, repair or maintenance project?



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Share of households that have done a home improvement job

2024 Q3



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Plans in the next 30 days

Are you planning to start a home improvement, repair or maintenance project in the next 30 days?

DUMMY DATA



Theme questions

In this chapter, we take a deeper dive in the purchasing on home improvement products. The respondents were asked the following:



Branding:

- What are your preferences for buying branded and non-branded home improvement products online, considering **price, brand preference, motivation, and the importance of brand names?**
- How would you rate [1-10] the following DIY stores* on the aspects: **service & advice, quality of products, attractive prices, sustainability, shopping experience and general satisfaction.**
- Private labels and home brands (own-brands) are regularly offered in DIY stores as an alternative to the A-brands. Usually these products are cheaper due to lower marketing costs for these brands. **What's your opinion on these home-brands in DIY stores?**
- **In which of the following categories would you prefer an A-brand over a home brand?** Covered categories: paint, bathroom products, masking tapes, garden tools, adhesives, sealants, locks, safety cameras, plugs, roof windows, boilers, taps, duct tape and brushes/rollers.
- Do you feel this month is a **good or bad time to start a project** over/under €5.000 for home improvement, repair or maintenance? Do you feel this is a **good or bad time to hire a professional** for home improvement, repair or maintenance?
- In the last 30 days, have you **postponed or cancelled** a home improvement, repair or maintenance project you planned to start? Why did you postpone or cancel your home improvement, repair or maintenance project?
- Are you **planning to start** a home improvement, repair or maintenance project in the next 30 days?

Country Overview

In this chapter, we examine the purchasing of home improvement products on a country level:

- Share of households that did a home improvement job
- Satisfaction score on various aspects of DIY stores
- Attitudes and preferences towards A-brands vs. private labels

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Nr.1 DIY store per country by various aspects

How would you rate [1-10] the following DIY stores on these aspects...?

	AUSTRIA		BELGIUM		DENMARK		FRANCE		GERMANY		ITALY	
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
General satisfaction	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand
Shopping experience	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand
Quality of products	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand
Attractive price	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand
Service & advice	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand
Sustainability	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand
	NL		POLAND		SPAIN		SWEDEN		UK			
	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024		
General satisfaction	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand		
Shopping experience	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand		
Quality of products	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand		
Attractive price	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand		
Service & advice	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand		
Sustainability	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand	Brand		

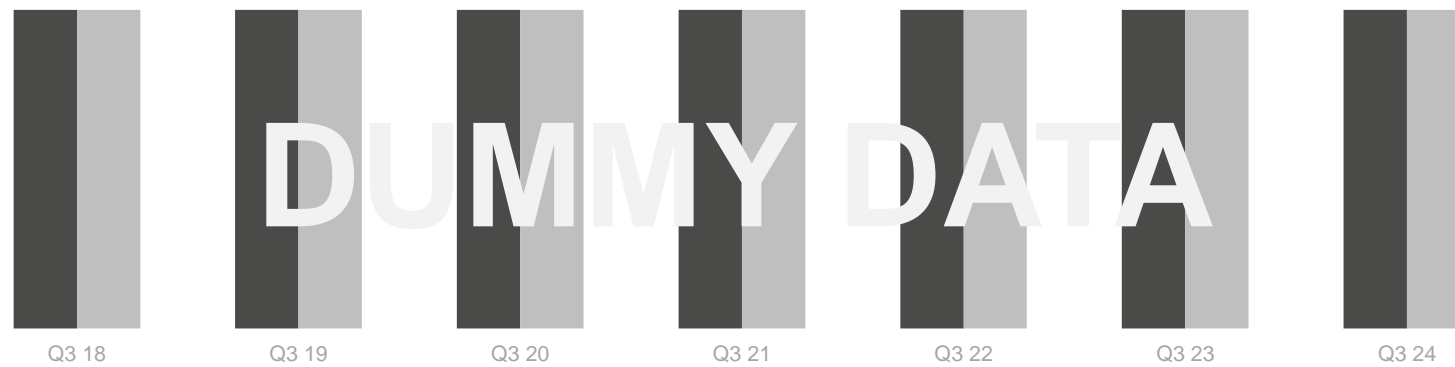
Base per country:
N = 600

GERMANY

Share of households that did a home improvement job

GERMANY

EU AVERAGE



**Category "Other" includes: Furniture shop, Garden centre, Wholesaler and Other shops*

GERMANY

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Satisfaction score on various aspects of DIY stores

Bauhaus Hornbach Lagerhaus OBI

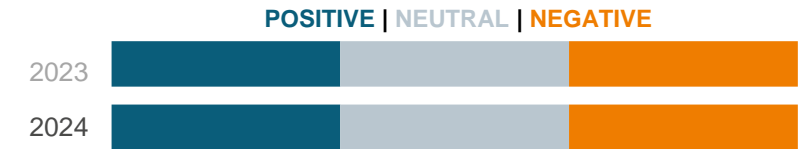


^GS stands for general satisfaction. A regression model is built to see to what extent each aspect influences general satisfaction. The higher the percentage, the more effect has the aspect on general satisfaction.

Base: N = 334

*Statistically significant. If the effect is not significant, there is barely any influence on general satisfaction.

Attitude towards private labels



Preference:

A-brands versus private labels



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Product Categories

INCLUDED CATEGORIES OF THE RESEARCH

Adhesives & Sealants	Bathroom products	Decorative products	HVAC	Paint Supplies	Power Tools	Roof daylight	Security & Safety	Constructive	Electrical
Sealants	Bath	Flooring products	Airconditioning	Fillers	Drill	Dormer windows	Locks	Insulation	Switches and sockets
Tile adhesive	Bathroom furniture	Paint	Boiler (Central heating system)	Safety products (e.g., masks or respirators)	Electrical saw	Roof windows	Security camera	Gypsum boards	
	Shower enclosures	Wallpaper	Ventilation	Sandpaper	Electrical screwdriver		Smoke alarm or fire alarm		
	Shower set/shower head	Window decoration		Tapes	Hammer drill		Home automation systems		
	Shower tray				Sander				
	Taps & mixers								
	Toilet								
	Washbasin								
	Whirlpool								
Shower drain (for tiled shower floor)									

Home Improvement per Category

In this chapter, we dive into questions about specific product categories, as mentioned in the previous slide:



- Share of households that have done a **home improvement job per product category** on a **quarterly level**
- **DIY share vs. DIFM share** per product category
- Who **determined the brand** of the product – you or the professional?
- What **brand** of <product category> did you buy?
- Further product specific questions

USP Marketing Consultancy

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