



European Home Improvement Monitor Q1 2018

Orientation: Drivers and barriers for home improvement jobs

1. Home improvement on a European level

Key insights

Drivers

Barriers

Future

Conclusion

Conclusion

Conclusion

In the full report you will get key insights in the orientation and drivers and barriers for home improvement jobs

- In this first report of 2018 the set-up of the report is changed. We evaluated the report with our customers and came to the conclusion that there's a need for more in-depth results and less repetition of the insights that we report. For this reason we made two changes to the report:
 1. We do not report all results in each quarterly report anymore but each topic once a year. In the product category chapters, the product results were reported 4 times per year based on 4 quarters. This resulted in insights that nearly didn't change over the quarters. This type of results will now only be reported once a year.
 2. On the other hand we like to provide our customers with more in-depth information on the topics we present in our monitor. This means more long term trends and more splits on for example age, income, or DIY experience.
- **The topics that we will cover:**
 - Q1 topic: Orientation. In-depth topic: Drivers and barriers for home improvement jobs
 - Q2 topic: Purchase channels. In-depth topic: Online purchases
 - Q3 topic: Branding. In-depth topic: Love brands
 - Q4 topic: DIY vs DIFM. In depth-topic: Market size home improvement per country
- In this report we will present the topic "Drivers and barriers for home improvement jobs" which will bring more insights in the starting phase of the customer journey when starting a home improvement project.

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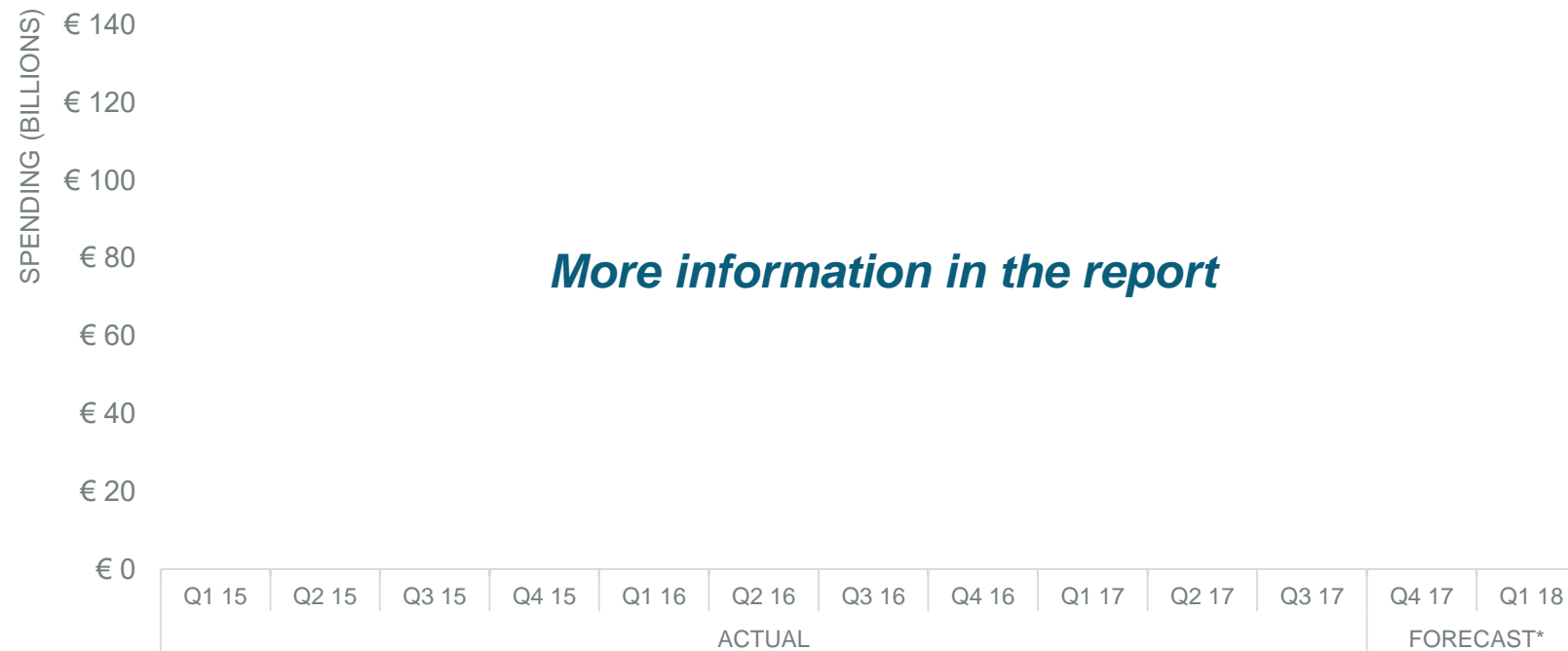
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European overview – Spending trend line

Home improvement spending has a disappointing... [all insights in the report]

European spending on home improvement (labour + material)

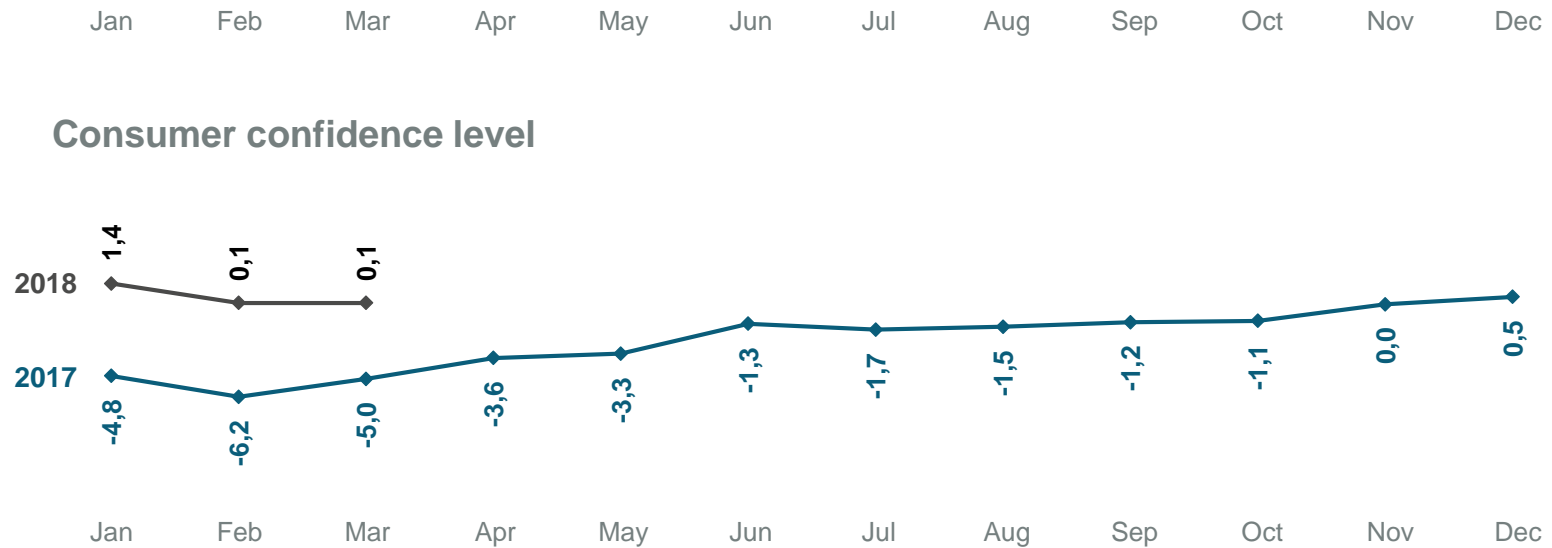


The full report provides the conclusions.

Less home improvement jobs were done in... [all insights in the report]

Share of households conducting a home improvement job

More information in the report





European overview
Orientation



European overview
Drivers & Barriers



Country overview
Drivers & Barriers



Home improvement
per category

% Professional involved

More information in the report

% Myself/partner

Low income

Medium income

High income



Q1: Who determined the choice of type of product - you yourself or the professional? (N Low = 33,751; N Medium = 41,315; N High = 14,416)
Q2: Who determined the choice of brand of the product - you yourself or the professional?

European overview – Orientation

Decision making on type of products is age related.

% Professional involved

More information in the report

% Myself/partner

18-34

35-54

55+



Q: Who determined the choice of type of product - you yourself or the professional? (N 18-34 = 34,521; N 35-54 = 33,706; N 55+ = 30,759)

% Professional involved

More information in the report

% Myself/partner

No experience

Decorator

"Light" DIY-er

Renovator



European overview – Spending & Orientation

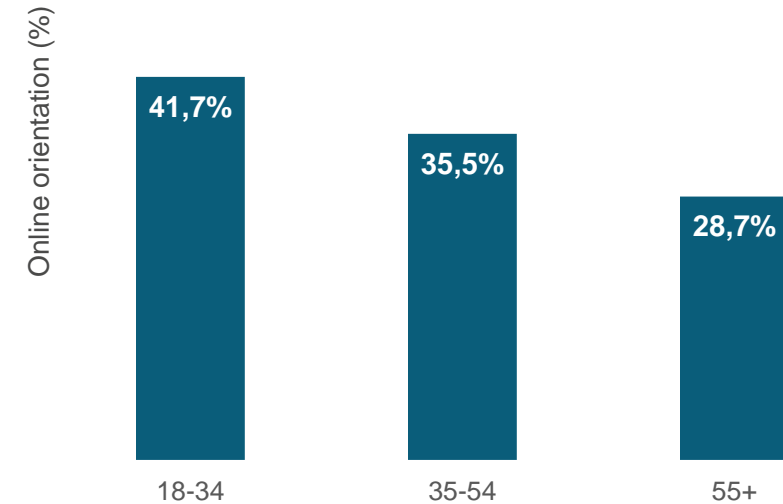
Online orientation is increasing, especially among the younger consumers



Online orientation among different age groups



Younger consumers use online channels to orientate much more than the older ones.



Q: Did you get information about the product online?
(N 2014 = 45810; N 2015 = 60854; N 2016 = 63616; N 2017 = 59228) (N 18-34 = 78078; N 35-54 = 86544; N 55+ = 64886)
Asked to respondents that bought the products.

More information in the report

% of people who selected a brand **before going to the shop**

2014

2015

2016

2017

More information in the report

% of people who selected a brand **before going to the shop**

No experience

Decorator

"Light" DIY-er

Renovator





European overview
Spending & Orientation



European overview
Drivers & Barriers



Country overview
Drivers & Barriers



Home improvement
per category

Theme questions:

Latest project:

- Q1. *What was the latest large home improvement project that you have conducted?*
- Q2. *What was the primary(other) driver(s) to undertake the project?*
- Q3. *Was the project undertaken in response to a particular change in your life circumstances?*
- Q4. *Did you encounter any barriers in planning the project?*
- Q5. *How long was it before you started the project after having the initial idea?*
- Q6. *Was the project conducted as a separate project or in combination with other home improvement projects?*
- Q7. *What other home improvement projects were these?*

Planned projects:

- Q8. *Which of the following large home improvement projects are you planning to conduct next?*
- Q9. *What questions do you have with regard to this project?*
- Q10. *When would you like to conduct this project?*
- Q11. *How likely is it that you will postpone this project?*
- Q12. *What do you expect to be the most important barriers for you to start up this project?*



European overview
Spending & Orientation



European overview
Drivers & Barriers



Country overview
Drivers & Barriers

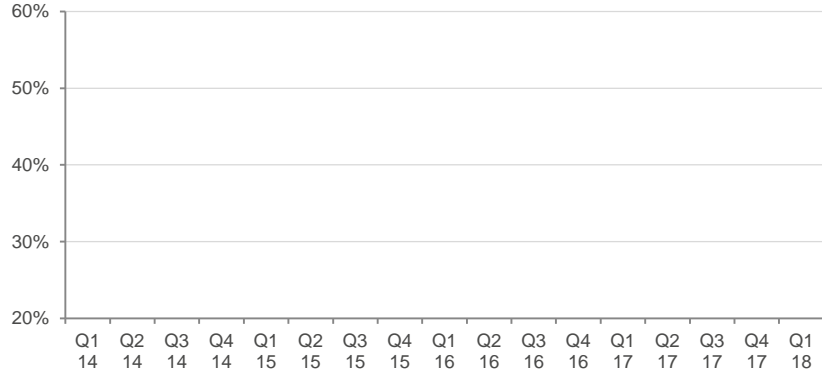


Home improvement
per category

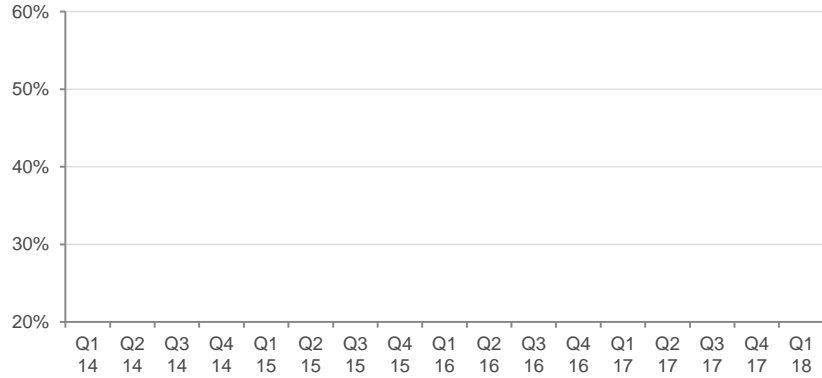
- The European overview regarding orientation and drivers and barriers for home improvement jobs was depicted in the previous chapters. In this chapter, we will zoom in on the separate countries to give a more specific view of the home improvement market in Europe.
- We will start with the penetration rate of the home improvement jobs for all the countries in the scope of this study. Next, all the information on the drivers and barriers of the consumers per country is depicted.



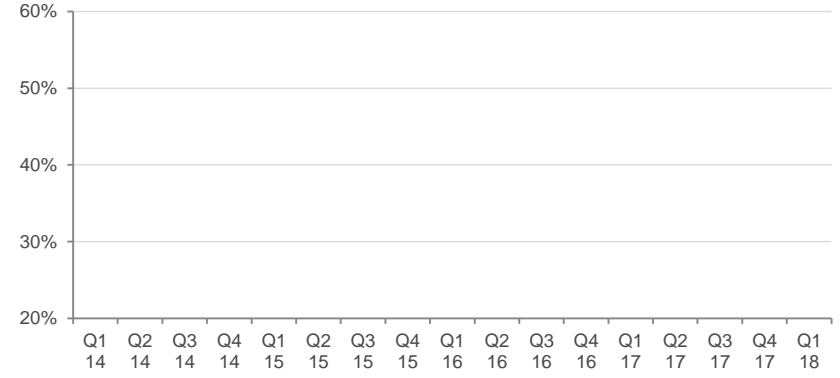
Country overview – Trendline of the penetration



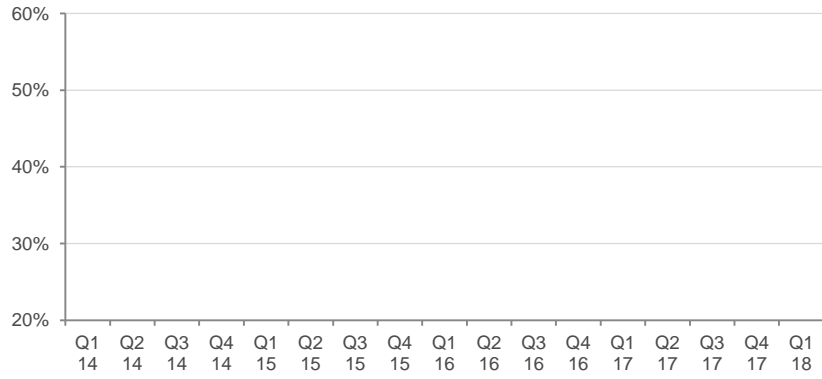
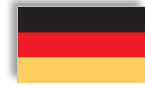
— EU — Belgium



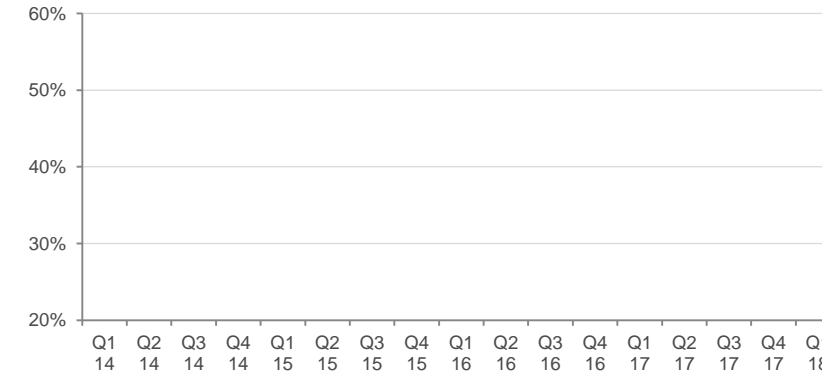
— EU — The Netherlands



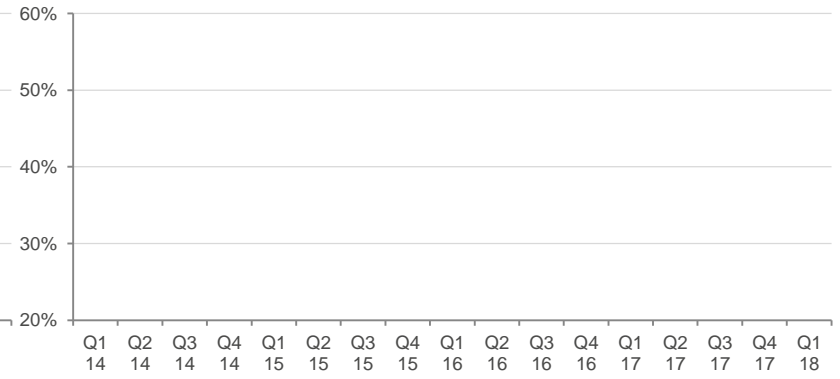
— EU — Germany



— EU — France



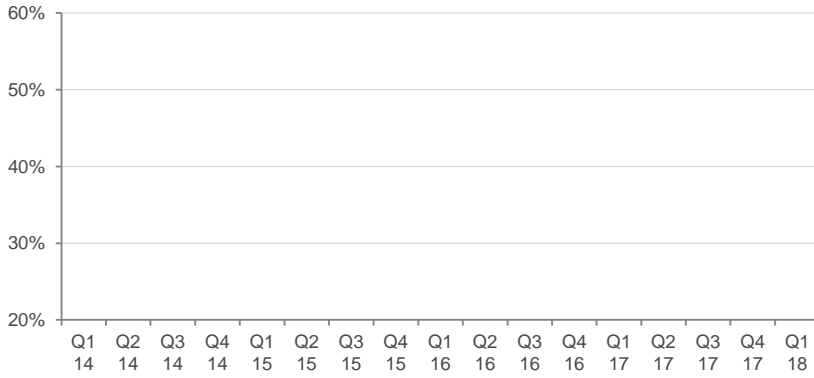
— EU — Poland



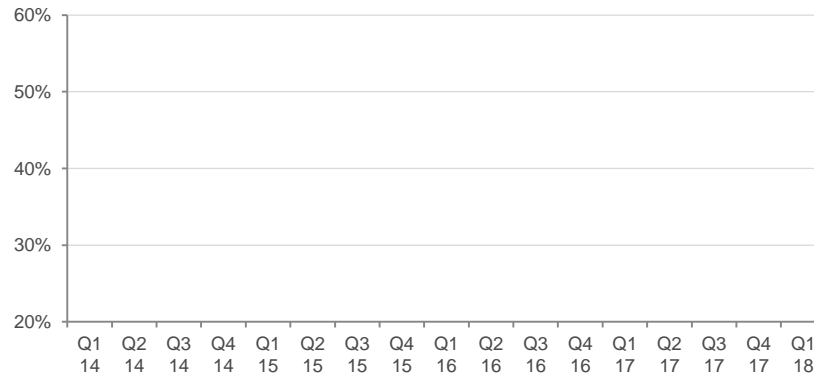
— EU — Italy



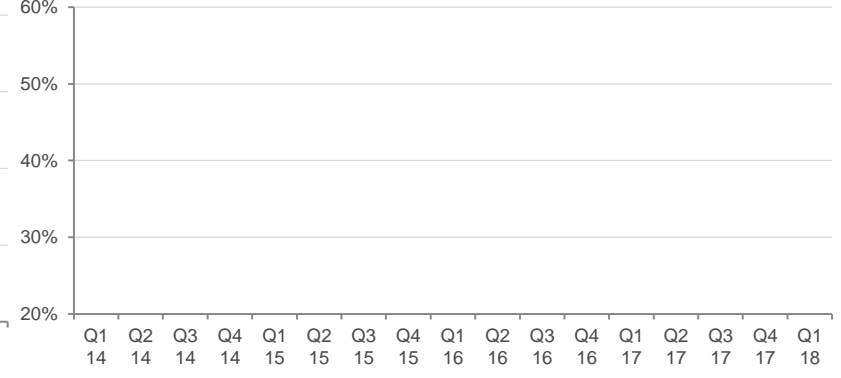
Country overview – Trendline of the penetration



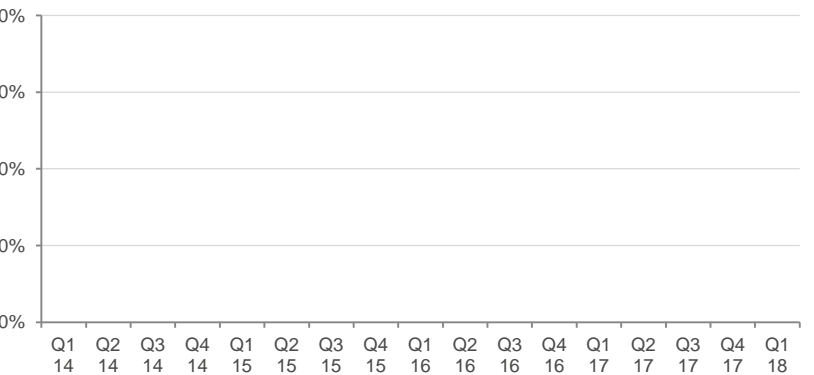
— EU — Spain



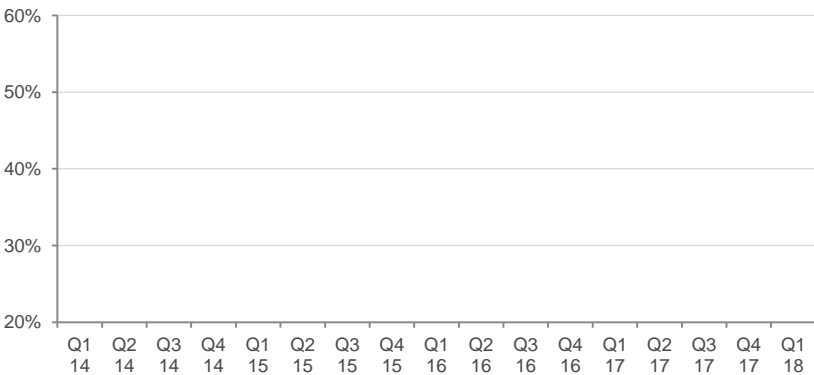
— EU — UK



— EU — Denmark



— EU — Austria



— EU — Sweden

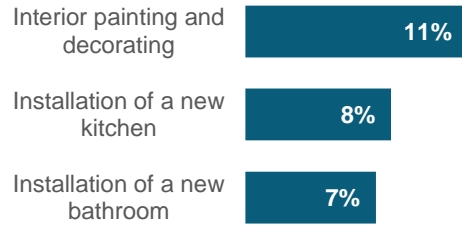


The full report provides key insights in the developments in the market.



Top-3 home improvement projects done

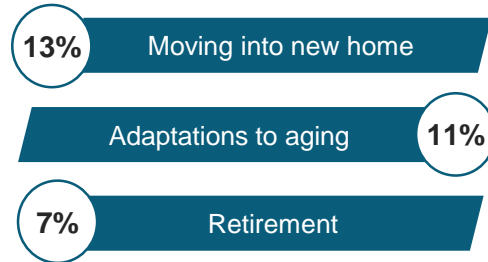
15% installed either a **kitchen or bathroom**



Q1

Circumstances' changes

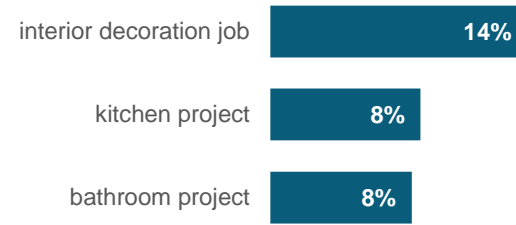
46% had a change in life circumstances that resulted in the project



Q1

Home improvement projects planned

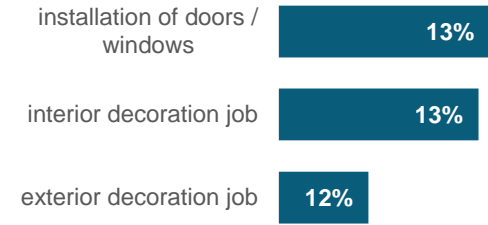
58% has no new home improvement project planned



Q4

First home improvement project

3% Will do their kitchen first



Q4

75% conducted the project as a **separate project**



Q2

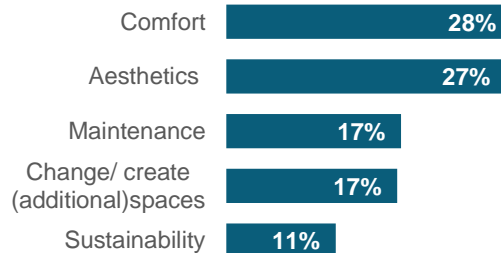
50% started the project within **3 months** after the idea



Q2

Key drivers

12% wanted to **improve the look** of their home



Q3

Main barriers

41% experienced a barrier

23% of those who experienced a barrier had a difficulties with a **limited budget**.
5% didn't know what materials or products to use
5% didn't want to do it



Q3

60% Of the projects that are **planned**, will be conducted **within one year**.

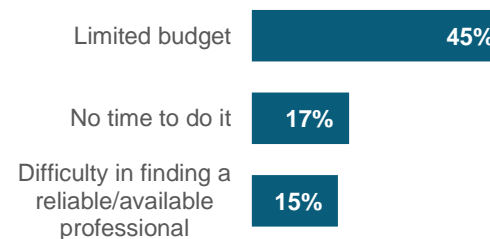
Q5

36% Is **likely to postpone** the project, when planning to conduct a project in the future

Q5

Expected barriers

17% expect no barrier at all



Q5

Belgian consumers are all about the comfort and aesthetics when doing a home improvement job. One of the reasons for this are the adaptations to aging, which are mentioned quite a lot as a change in the life circumstances that resulted in the project. Furthermore, there are already more projects planned, but the limited budget may be a barrier for these projects.



Q1. What was the latest large home improvement project that you've conducted in which you spent more than €1000?; Was the project undertaken in response to a particular change in your life circumstances?
 Q2. Was the project conducted as a separate project or in combination with other home improvement projects?; How long was it before you started the project after having the initial idea?
 Q3. What was the primary driver to undertake the project?; Did you encounter any barriers in planning the project?
 Q4. Which of the following large home improvement projects are you planning to conduct next?; Which project are you planning to start up first?;
 Q5. When would you like to conduct this project?; How likely is it that you will postpone this project?; What do you expect to be the most important barriers for you to start up this project?

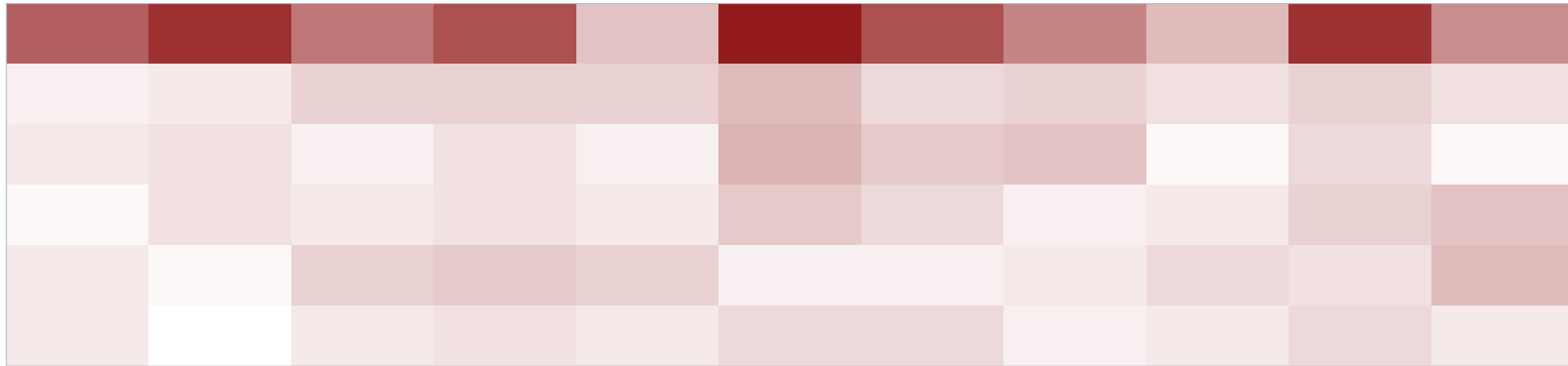
About barriers

% Experiences a barrier when doing big renovation project(s)



Main barriers (top-6)

1. Barrier xxxx
2. Barrier xxxx
3. Barrier xxxx
4. Barrier xxxx
5. Barrier xxxx
6. Barrier xxxx

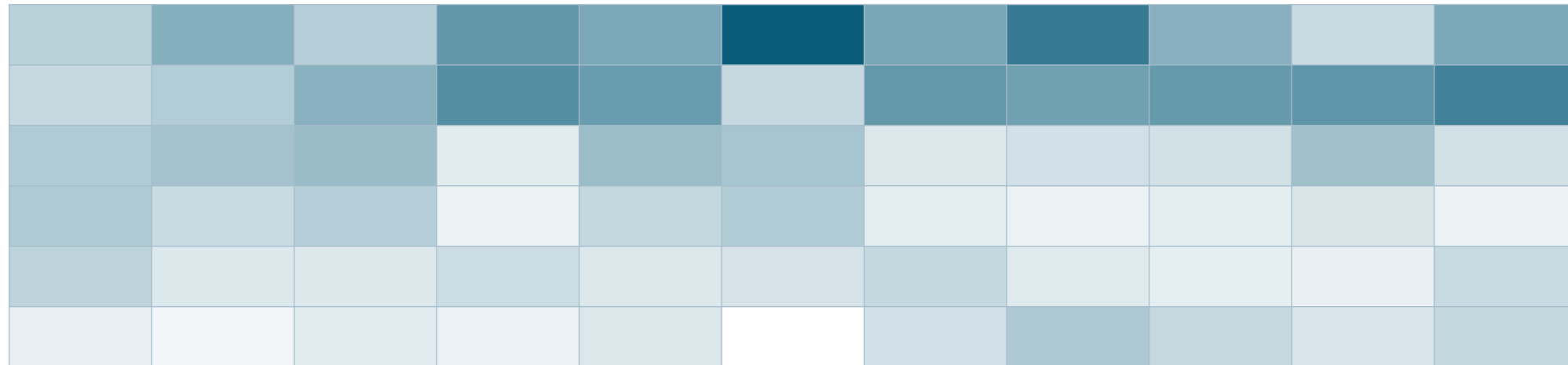


About drivers



Main drivers (top-6)

- 1. Driver xxxxx
- 2. Driver xxxxx
- 3. Driver xxxxx
- 4. Driver xxxxx
- 5. Driver xxxxx
- 6. Driver xxxxx





European overview
Spending & Orientation



European overview
Drivers & Barriers

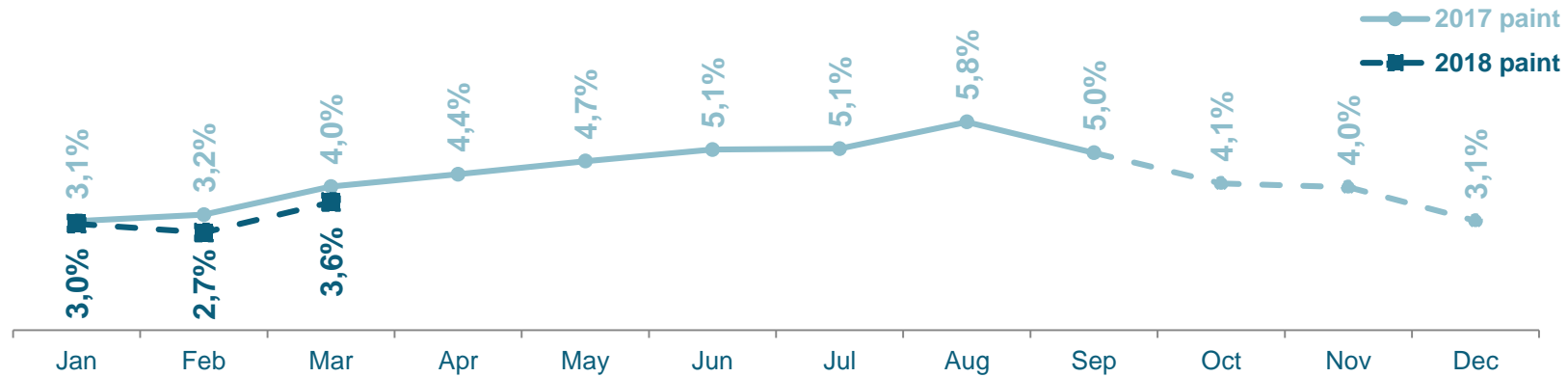


Country overview
Drivers & Barriers



Home improvement
per category
Paint

Paint job(s) done per month (on European level)



More information in the report

Q1: Who determined the choice of **type of product** - you yourself or the professional?

Q2: Who determined the choice of **brand** of the product - you yourself or the professional?

Q3: Did you make your **brand selection** in the shop or had you already made your brand selection before going to the shop?

Q4: Did you get **information about the product online**?

**More information in the report including splits per income, age,
DIY experience and trend over years**

USP Marketing Consultancy

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