



European Home Improvement Monitor Q1 2020

Focus on: Smart and energy efficient homes

Preface

RESULTS CAN BE FOUND IN THE FULL REPORT

The topics that are being covered in 2020:

Q1 Focus: **Orientation**. Theme topic: **Smart and energy efficient homes**

Q2 Focus: **Purchase channels**. Theme topic: **Influence of online channels in decision making**

Q3 Focus: **Branding**. Theme topic: **Name brands vs private labels**

Q4 Focus: **DIY vs DIFM**. Theme topic: **The rise of DIFM in home improvement**

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If there are any suggestions or remarks on our reports, please let us know. We are always looking for ways to improve, so any feedback is welcome.

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THEME: SMART AND ENERGY EFFICIENT HOMES

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HOME IMPROVEMENT PER CATEGORY

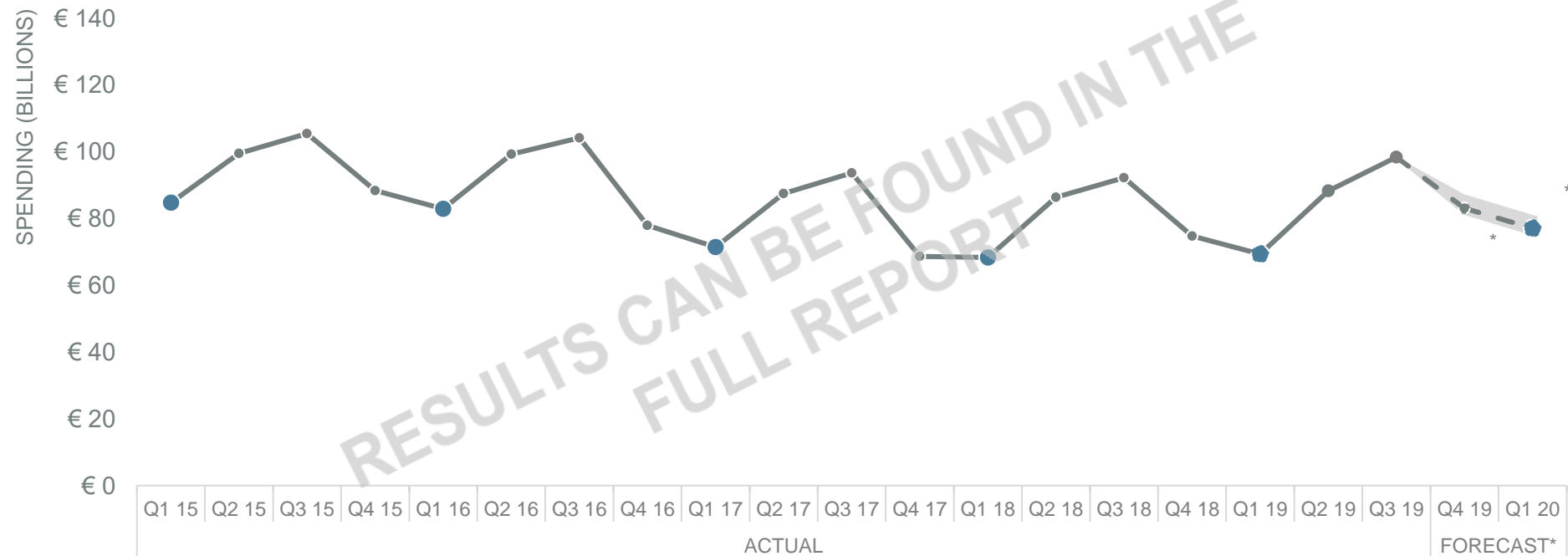
APPENDIX



European spending on home improvement

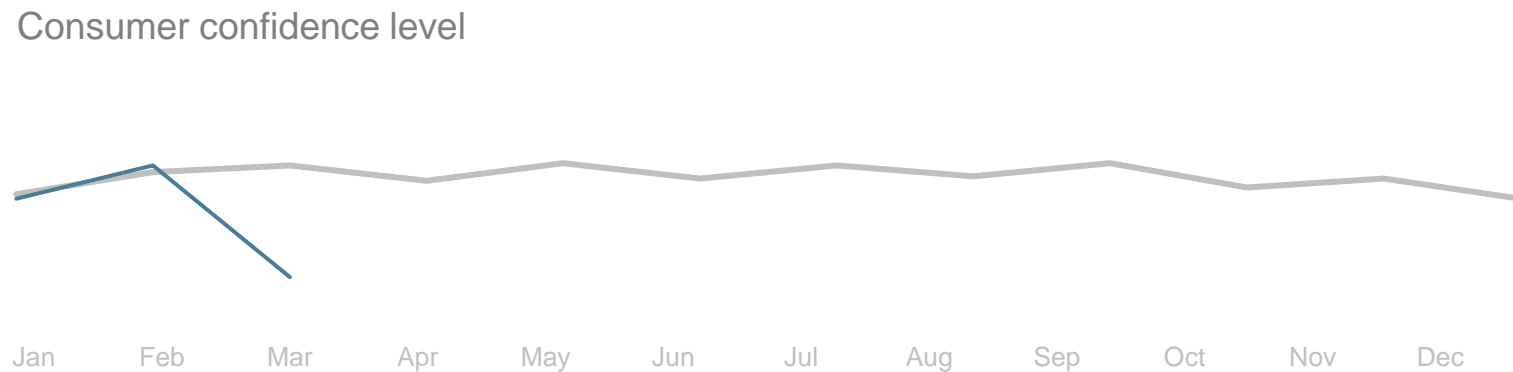
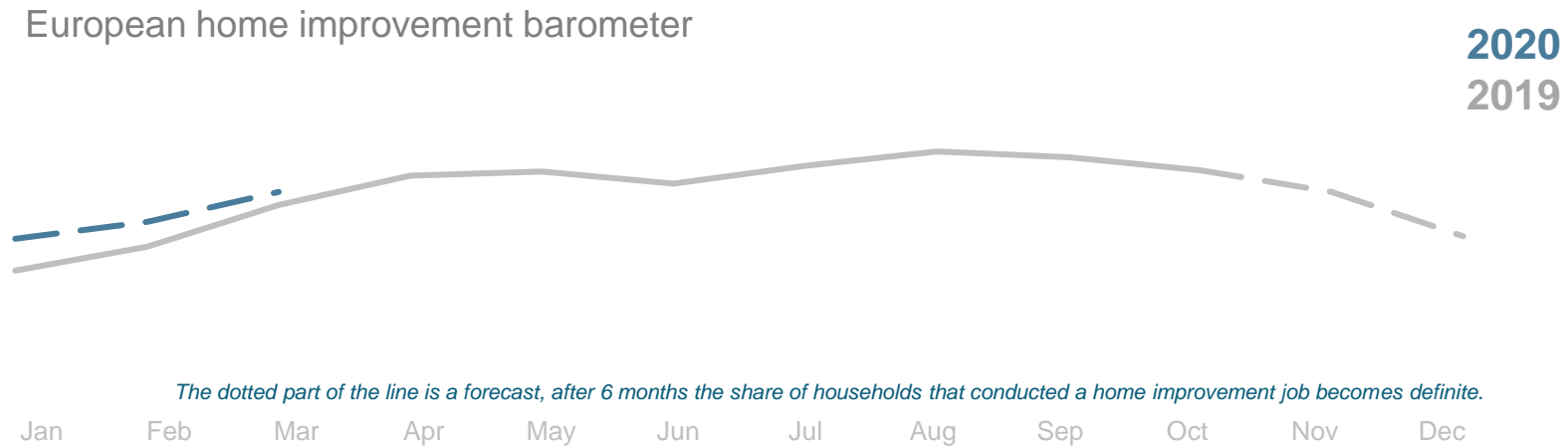
Total spending by European households on home improvement increased by **XX%** in the first quarter compared to last year.

European spending on labour + material



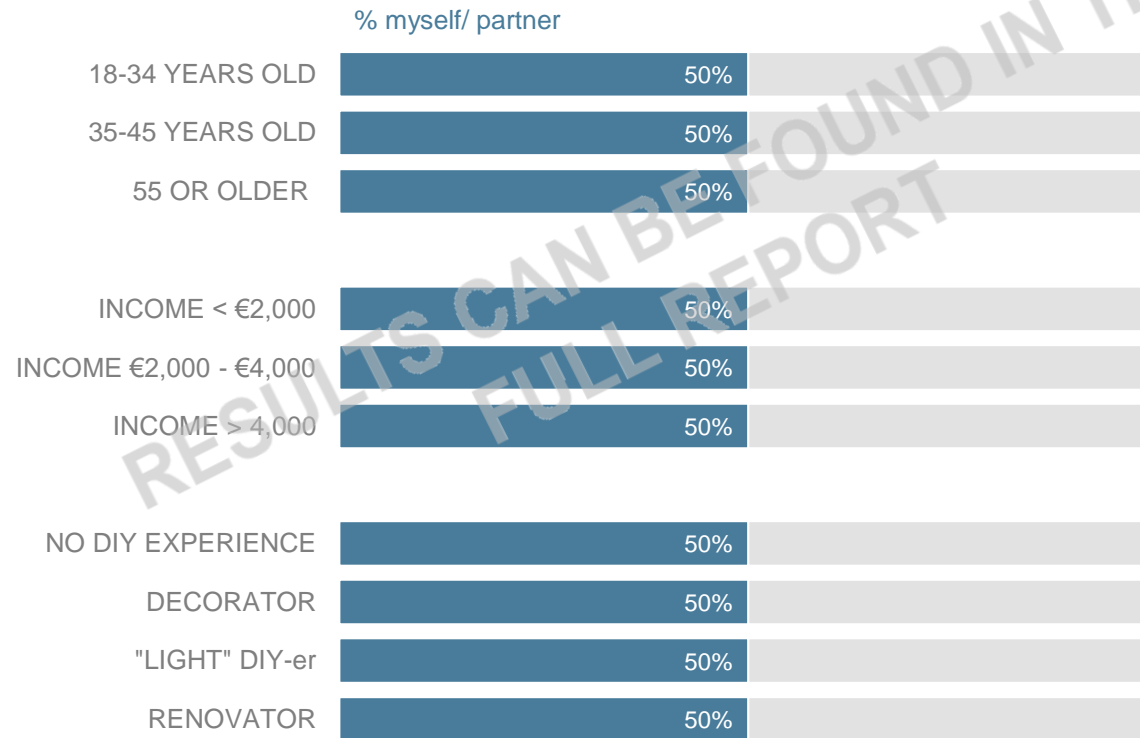
Share of households conducting a home improvement job

In Q1-20, the number of households that conducted a home improvement job is higher compared to Q1-19.



Decision maker for the choice of the product

Who determined the choice of type of product - yourself or the professional?

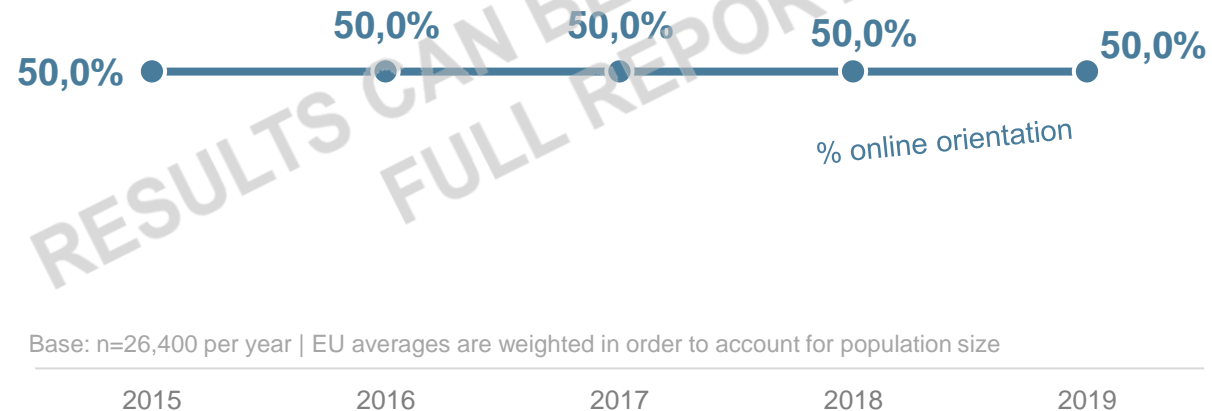


Base: n=132,000 in total
EU averages are weighted

The amount of consumers that orient themselves online before their home improvement purchase has XXX

Online orientation

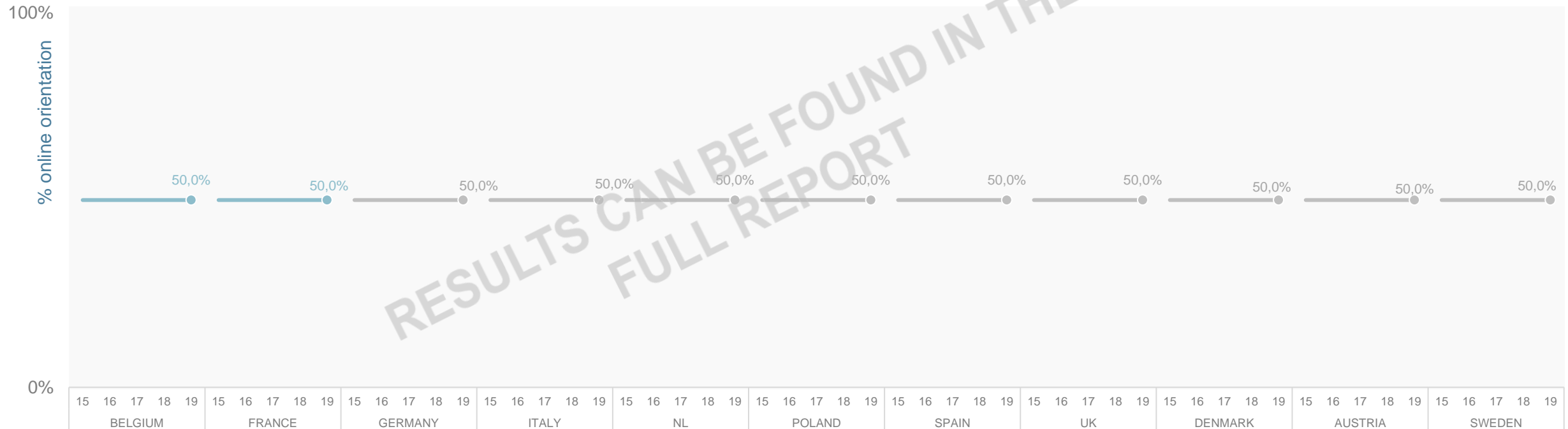
Did you get information about the product online?



Base: n=26,400 per year | EU averages are weighted in order to account for population size

Online orientation

Did you get information about the product online?

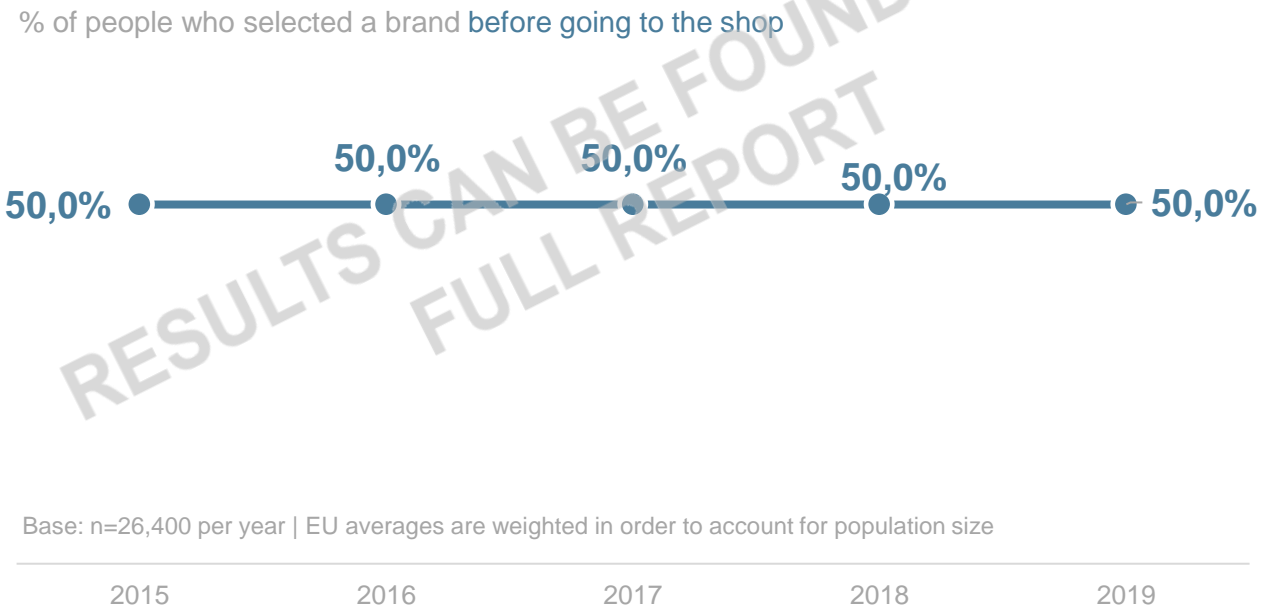


Base: n=2,400 per year per country | EU averages are weighted in order to account for population size

The physical store is the place where most people decide on the brand

Moment of brand selection

Did you make your brand selection in the shop or did you already make your brand selection before going to the shop?



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Theme questions

In this chapter, the European overview regarding **smart** homes will be shown. The respondents were asked the following:

- Which type of smart home products do you have?
 - Heating (e.g. smart thermostat, automatic temperature control)
 - Lighting (e.g. smart switches/ smart plugs/ smart door lock, smart doorbell)
 - Door communication (e.g. smart doorbell or security cameras)
 - ...
 - Do you own any of the following smart speakers?
 - Amazon Echo
 - Apple HomePod
 - Bose Home Speaker
 - ...
 - On average, how often do you give the smart speaker a task or ask a question?
 - To what degree are you interested in smart products for your home?
 - Are you planning to invest in smart home products within the next 12 months?
 - For which type of products are you planning to invest in smart home products?
 - To what degree are you familiar with KNX?
- To what degree do you agree or disagree with the following statements?
 - Smart home products are unnecessary
 - Smart home products are too complicated to install myself
 - Smart home products are too complicated to use myself
 - Smart home products are very expensive
 - Smart home products can help to make my life easier
 - Smart home products can help to save energy in my house
 - There will be more smart home products in my house within the next 3 years
 - Smart home products should be installed by professionals



Theme questions

In this chapter, the European overview regarding **energy efficient** homes will be shown. The respondents were asked the following:

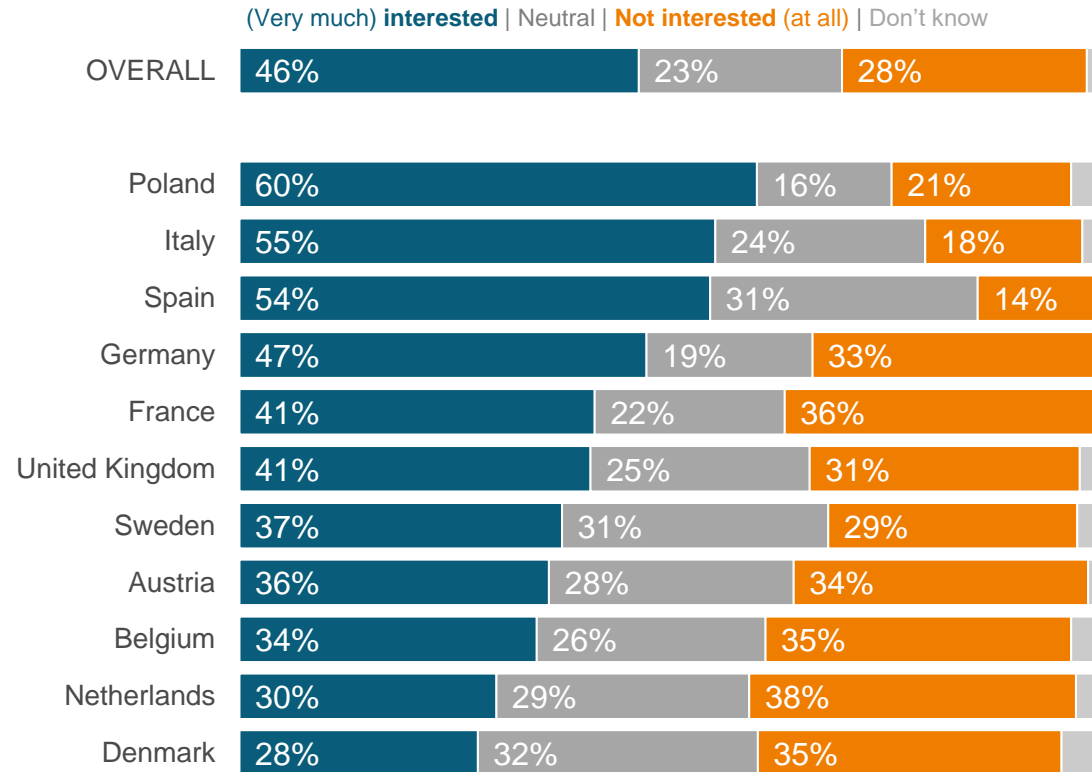
- What type of measures have you already taken to improve energy efficiency or water saving in your house?
- What type of measures would you like to take within the next 3 years to improve energy efficiency or water saving in your house?
- In general, what are the best ways to make a house more energy efficient?
- To what degree do you agree or disagree to the following statements?
 - My home is already very energy efficient
 - I am actively looking for ways to improve the energy efficiency of my home
 - I will probably invest in making my house more energy efficient in the next 12 months

Half of consumers are interested in smart home products

One third plan to invest in smart home products.

Interest in smart home products

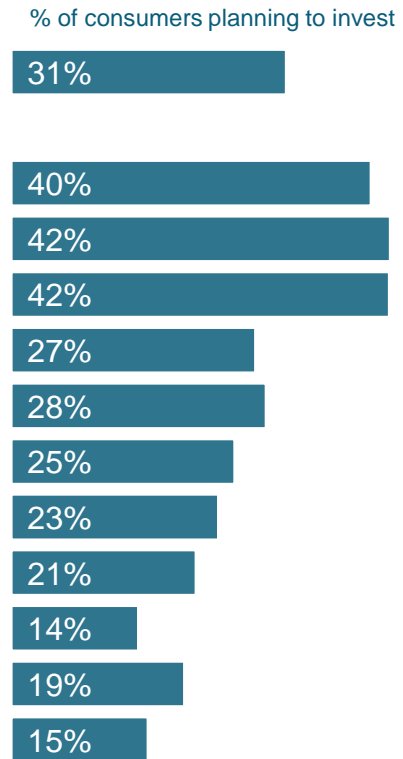
To what degree are you interested in smart products for your home?



Base: n=4,477

Investing in smart home products

Are you planning to invest in smart home products within a year?



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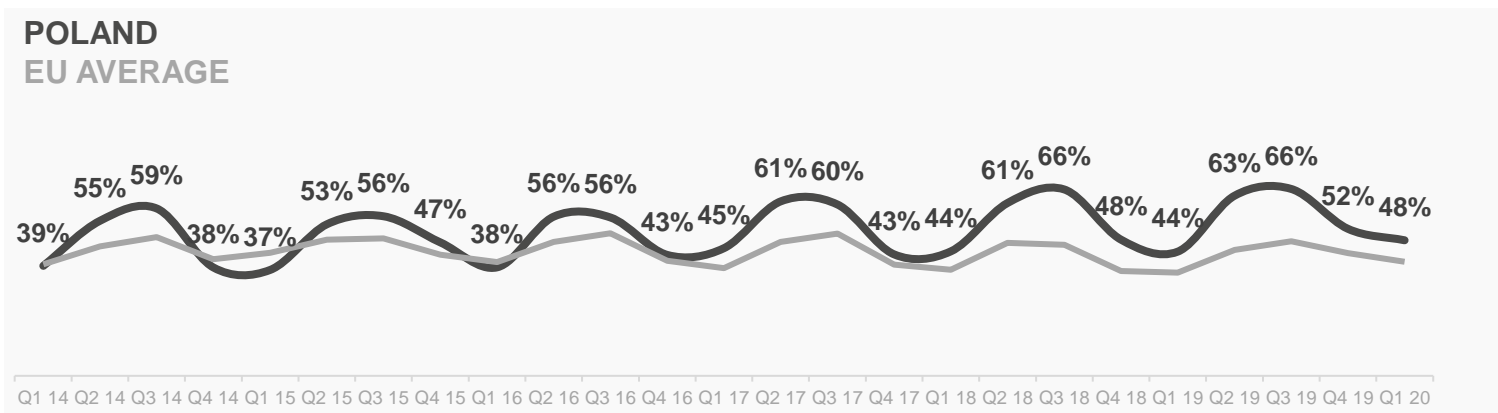
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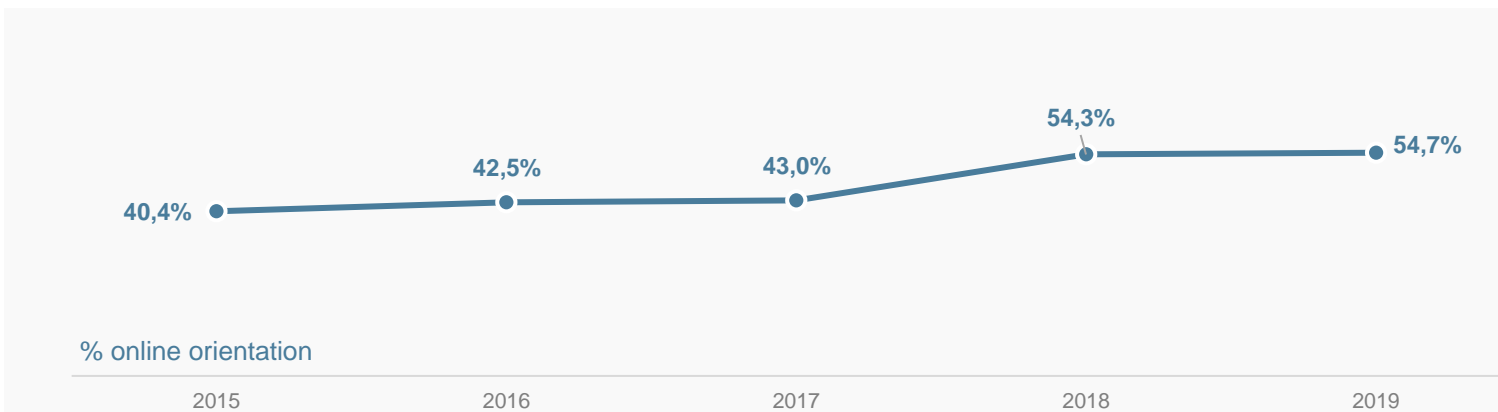
Poland

Number of home improvement jobs



Base: n=2,400 per year

Trend of getting product information online



Poland

Installing the heat pump is believed to be the best way to improve home energy efficiency.

Interest in smart home products



Very much interested | Interested | Neutral | Not interested | Not interested at all | DK

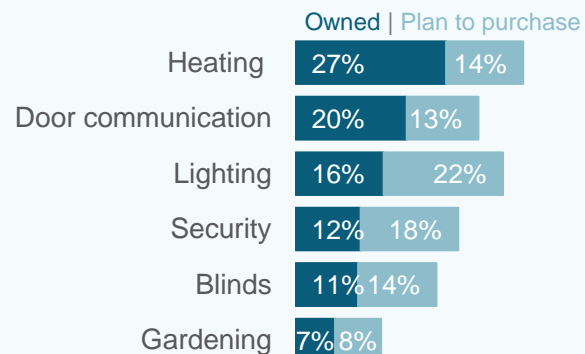


Willingness to invest in smart home products

40%

plan to invest in smart home products within a year

Smart home products:



Perception of home energy efficiency (EE)

[% of people who (completely) agree]



I am **actively looking for** ways to improve EE 65%
 I will probably **invest** in EE 46%
 My home is **already** very energy efficient 51%

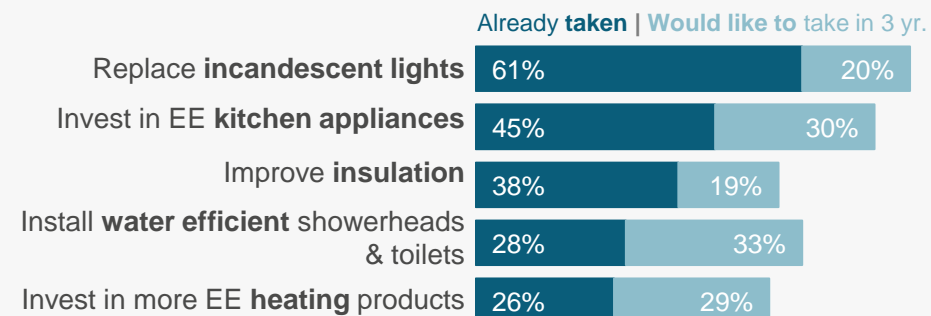
Best ways of improving home EE

[Top-3]

Install **LED lighting** 63%
 Install **EE appliances** 58%
 Install **solar panels** on the roof 53%

Measures for improving home EE

[Top-5]



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AVAILABLE PRODUCT CATEGORIES



FLOORS



PAINT SUPPLIES



PAINT



WALLPAPER



PLASTER BOARD



INSULATION



POWER TOOLS



GARDEN TOOLS



DOORS/WINDOWS



FILLERS/MORTARS



BATHROOM



KITCHEN



SAFETY & SECURITY



TILES & TILE GROUTS



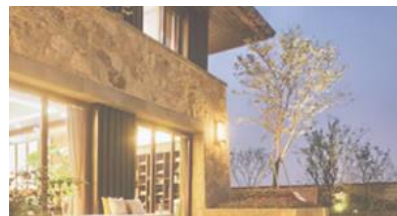
ADHESIVE/SEALANT



WINDOW DECO



ROOF WINDOWS



LIGHTING



SMART HOME



HVAC

SPECIFIC QUESTIONS INCLUDED IN EHIM ON...



Q1 Orientation

- Did you get information about the paint online?
- Did you make your brand selection in the shop or had you already made your brand selection before going to the shop?
- Who determined the choice of type of product?
- Who determined the choice of type of brand?

Q3 Branding

- Which of the following brands for Paint have you ever heard of?
- How would you rate the following paint brands in general?
- Can you tell for the following statements how well it applies to the brand(s)?
[This brand has the best quality of products / This brand offers the best overall value for money / This is a brand that I trust / The products from this brand are easy to use]
- [if purchased in the past 6 months] What brand did you buy?

EXAMPLE OF THE QUESTIONS ASKED ABOUT A PRODUCT IN THE MONITOR

These questions are being asked on a monthly base for 100+ different products and reported per quarter to subscribers of the European Home Improvement Monitor

Q2 Purchase channels

- Did you purchase the paint yourself or did a professional purchased it?
- Where did you buy the paint?
- Did you order any of the products online?
- What was the name of the online shop where you purchased the paint?
- How much was spent in total on the paint?

Q4 DIY vs. DIFM

- Did you apply the paint yourself or did a professional applied it?
- How was the paint applied inside / outside the house?
- What type of paint was used inside / outside the house?
- Which percentage of the wall paint / lacquer that you have purchased for the inside / outside of the house was white, coloured (with/without tinting machine)
- What type of paint supplies were used?

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Methodology

We use a nationally representative sample for our study. This includes all types of consumers aged 18+; Male and female, house renters and owners, consumers with & without DIY experience, those who conduct DIY jobs themselves, and people that outsource it to professionals.

Sample size

1st chapter – EU results are based on 26,400 interviews per year

2nd chapter – EU level based on 6,282 interviews

3rd chapter – Incidence rate (number of home improvement jobs) is based on 2,400 per country; theme questions on approx. 400 interviews per country

4th chapter – sample size depends on the incidence rate of the product category (see beginning of chapter 4 – share of households conducting a job)

Sample background

[GENDER]			[AGE]		
Male	Female		18-34	35-54	55+
51%	49%	BELGIUM	30%	35%	35%
48%	52%	FRANCE	26%	36%	37%
48%	52%	GERMANY	25%	35%	39%
48%	52%	ITALY	26%	35%	39%
45%	55%	NL	27%	34%	40%
50%	50%	POLAND	35%	37%	28%
55%	45%	SPAIN	30%	38%	32%
49%	51%	U.K.	29%	36%	36%
50%	50%	DENMARK	24%	32%	44%
52%	48%	AUSTRIA	35%	36%	29%
49%	51%	SWEDEN	32%	31%	38%

Weighting factor

All European figures are weighted in order to account for the difference in population size of the countries.

Methodology

INCLUDED CATEGORIES

General home improvement figures are based on **107 selected products**:

1 "BATH"	19 "FREEZER (FREE-STANDING)"	37 "DORMER WINDOW"	55 "RAIN WATERPIPE"	73 "DRYWALL"	91 "PLUMBING MATERIALS"
2 "BATHROOM FURNITURE"	20 "COOKER SURFACE (BUILT-IN)"	38 "ROOF WINDOWS"	56 "GUTTER"	74 "WOOD AND BOARD MATERIAL"	92 "TILE GROUT"
3 "SHOWER ENCLOSURES"	21 "COOKER (FREE-STANDING)"	39 "STAIRS STAIR COVERING"	57 "BOILER"	75 "INSULATION MATERIAL"	93 "FILLERS"
4 "SHOWER SET/ SHOWER HEAD"	22 "FAUCET"	40 "STAIRS BANNISTER"	58 "FUSE BOX/ELECTRICAL PANEL"	76 "STUCCO"	94 "TAPES"
5 "SHOWER TRAY"	23 "(COMBI-) MICROWAVE (BUILT-IN)"	41 "WC WASH BASIN"	59 "VENTILATION"	77 "PAINT"	95 "SANDPAPER"
6 "TAPS & MIXERS"	24 "(COMBI-) MICROWAVE (FREE-STANDING)"	42 "WC TAPS & MIXERS"	60 "AIR CONDITIONING"	78 "LIGHTING"	96 "BRUSH"
7 "TOILET"	25 "OVEN (BUILT-IN)"	43 "WC TOILET"	61 "ELECTRICAL VEHICLE CHARGING POINTS"	79 "TILE ADHESIVE"	97 "ROLLER"
8 "WASH BASIN"	26 "OVEN (FREE-STANDING)"	44 "BRICK"	62 "THERMOSTAT"	80 "FLOOR"	98 "PAINT SPRAY MACHINE"
9 "WHIRLPOOL"	27 "SINK"	45 "CEMENT"	63 "HOME AUTOMATION CONTROL PANEL"	81 "RADIATOR"	99 "PRESSURE WASHER"
10 "SHOWER DRAIN"	28 "STEAM OVEN (BUILT-IN)"	46 "ROOFING TILES"	64 "SMOKE ALARM OR FIRE ALARM"	82 "RADIANT HEATING"	100 "WET & DRY VACUUM CLEANER"
11 "HOOD VENT"	29 "STEAM OVEN (FREE-STANDING)"	47 "DOOR"	65 "ALARM INSTALLATION"	83 "SWITCH MATERIAL"	101 "STEAM CLEANER"
12 "KITCHEN COUNTERTOP"	30 "DISHWASHER (BUILT-IN)"	48 "ETICS"	66 "SECURITY CAMERA"	84 "SEALANTS"	102 "BLOW VAC"
13 "KITCHEN CABINETS"	31 "DISHWASHER (FREE-STANDING)"	49 "GLASS"	67 "HINGES"	85 "MORTARS"	103 "CHAIN SAW"
14 "REFRIGERATOR (BUILT-IN)"	32 "DECORATIVE MATERIALS"	50 "WINDOW CASING"	68 "LOCKS"	86 "WALLPAPER"	104 "ROBOTIC MOWER"
15 "REFRIGERATOR (FREE-STANDING)"	33 "DIVIDER"	51 "SOLAR PANELS"	69 "HAND TOOL"	87 "INTERIOR DOOR"	105 "WINDOW VACUUM CLEANER"
16 "REFRIGERATOR/FREEZER COMBINATION (BUILT-IN)"	34 "GARDEN FURNITURE"	52 "AWNINGS"	70 "ELECTRICAL TOOL"	88 "FURNITURE"	106 "PUMPS"
17 "REFRIGERATOR/FREEZER COMBINATION (FREE-STANDING)"	35 "GARDEN SHED / BARN"	53 "SKY LIGHT"	71 "GARDEN TOOL"	89 "WINDOW DECORATION"	107 "WATERING SYSTEM"
18 "FREEZER (BUILT-IN)"	36 "GARDEN PAVING"	54 "ASPHALT SHINGLE"	72 "GYPSUM BLOCKS"	90 "TILES"	

USP Marketing Consultancy

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