



# European Home Improvement Monitor Q3 2018

Focus on: Branding

The spending on home improvement jobs in the first three quarters of 2018 has structurally been ... in comparison to last year. However, the European Home Improvement Barometer shows a comparable number of jobs that has been done. The spending per job was ... and therefore also the total spending. For the first time this year the consumer confidence is at a ... rate than last year, which is ... prediction for spending on home improvement in the 2<sup>nd</sup> half of this year.

The theme chapter of this report is focusing on “Love brands” which provides insight for your category on:

- Brand awareness per country, what is the mental availability among consumers?
- Most preferred brands and status of the brand image on aspects like: value for money, best quality, trust and ease of use.
- Comparison to last year results

The **topics** that are covered in 2018 are:

Q1 Focus: **Orientation**. Theme topic: **Drivers & barriers for home improvement jobs**

Q2 Focus: **Purchase channels**. Theme topic: **Online purchases**

Q3 Focus: **Branding**. Theme topic: **Love brands**

Q4 Focus: **DIY vs DIFM**. Theme topic: **Market size home improvement per country**

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



European  
developments



**European overview**  
*Branding & Love brands*



**Country overview**  
*Branding & Love brands*



Home improvement  
per category

## European spending on home improvement (labour + material)

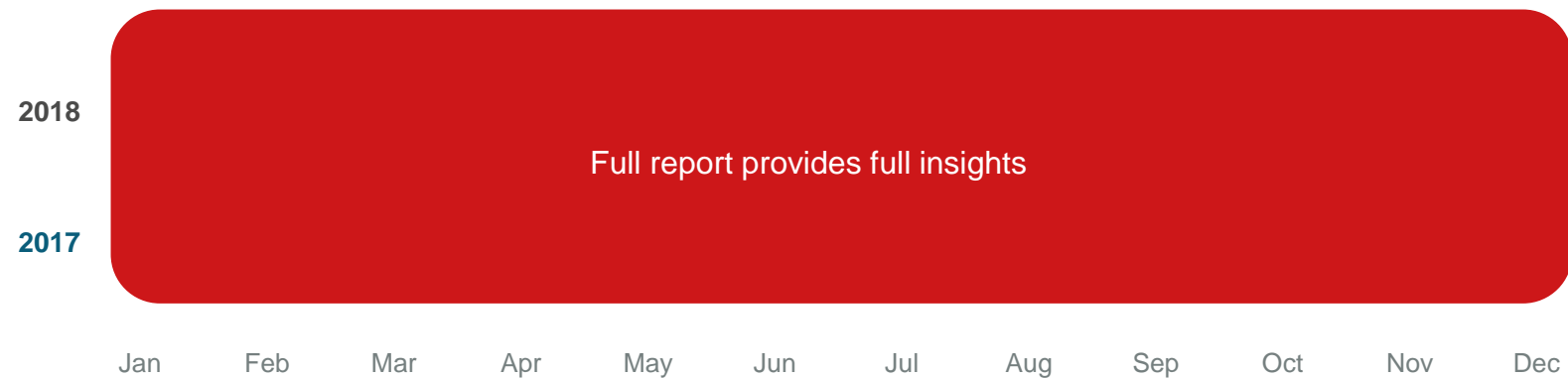


## Share of households conducting a home improvement job



Full report elaborates on the differences.

## Consumer confidence level





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**European overview**  
*Branding & Love brands*



**Country overview**  
*Branding & Love brands*



Home improvement  
per category

In this chapter, the European overview regarding consumers' brand awareness as well as consumers' attitude and preferences towards private labels for home improvement products in general will be shown.

The respondents were asked the following:

### GENERAL QUESTIONS:

- *Did you make your brand selection in the shop or had you already made your brand selection before going to the shop?*
- *What are for you **the top 3 brands in home improvement products?** [open]*
- *What are for you **the top 3 brands in DIY stores?** [open]*
- *What are for you **the top 3 brands for online shops** in home improvement? [open]*
- *Private labels and home brands (or 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 (or own-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 camera's, plugs, roof windows, boilers and taps.*

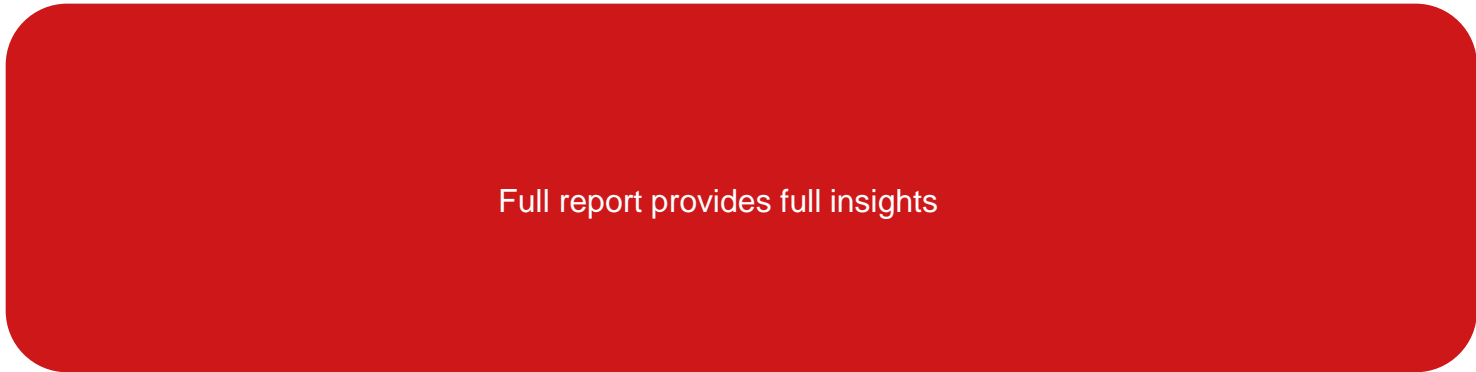


### PRODUCT SPECIFIC:

- *Which of the following brands for <the product> have you ever heard of?*
- *How would you rate the following brands in general?*
- *Can you tell for the following statements how well it applies to the brand(s)?*
  - *<A brand> has the **best quality** of products...*
  - *< A brand> offers the best overall **value for money**...*
  - *This is <a brand> that I **trust**...*
  - *The products from a <brand> are **easy to use**...*

## Moment of brand selection

European consumers are now more likely to select a brand before going to the shop.



Full insights can be found in the report

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

2014

2015

2016

2017



# European overview – Moment of brand selection

Among consumers with different DIY experience

## Moment of brand selection

Moment of brand selection depends on consumers' DIY experience.

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

Full insights can be found in the report

Full report provides full insights

No experience

Decorator

"Light" DIY-er

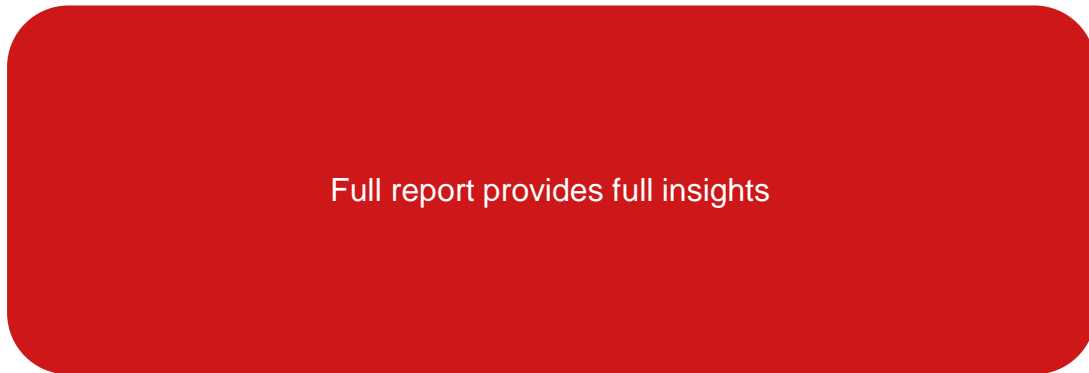
Renovator

*[DIY experience]*

### Moment of brand selection – income category

European consumers with a ... income are slightly more likely to select a brand before going to the shop than the ones with a ... income.

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

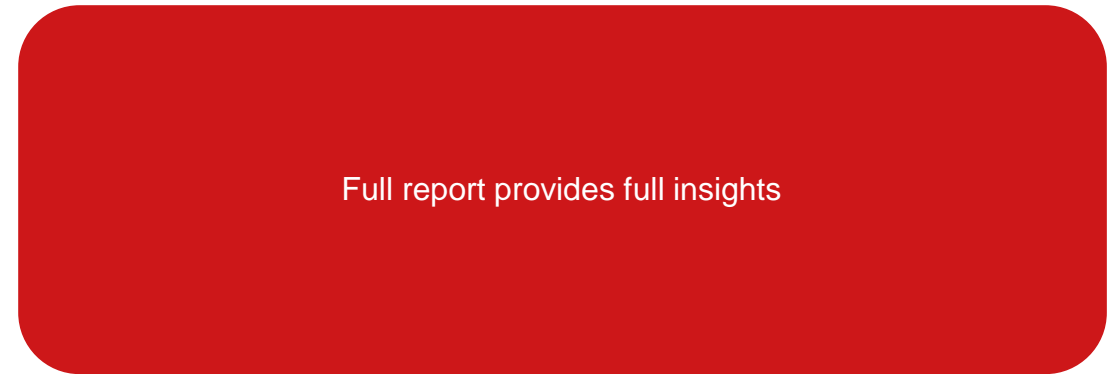


Under € 2,000    € 2,000 to € 4,000    Over € 4,000  
*[Income category]*

### Moment of brand selection – age group

Youngsters are slightly ... likely to select a brand before going to the shop than the older consumers. This is probably related to the fact that they ...

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



18 - 34    35 - 54    55 or older  
*[Age group]*

# Top-5 brands

## for home improvement products in Europe





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**European overview**  
*Branding & Love brands*



**Country overview**  
*Branding & Love brands*



Home improvement  
per category



## Top-3 Brands for home improvement products

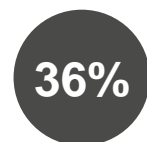
OBI	12.4%
Hornbach	10.9%
fischer	8.0%

## DIY stores (top-3)

OBI	28.8%
Hornbach	16.6%
Bauhaus	16.3%

## Online shops (top-3)

OBI	29.4%
Amazon	23.1%
Hornbach	12.6%

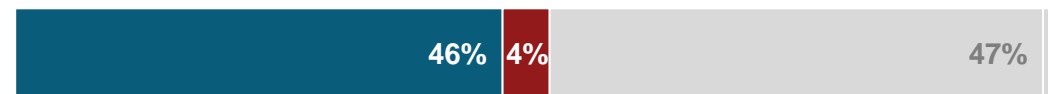


Selects the brand **BEFORE** going to the shop

60% in the shop, 4% has no opinion

## Attitude towards private labels

POSITIVE | NEGATIVE | NEUTRAL | DON'T KNOW



## Preference:

### A-brands versus private labels





## Top-3 Brands for home improvement products

Ikea	16.4%
Bosch	4.9%
Bauhaus	3.3%

## DIY stores (top-3)

Bauhaus	18.1%
Bygghuset	9.5%
Jula	6.9%

## Online shops (top-3)

Ikea	26.3%
Bauhaus	9.5%
Jula	8.4%



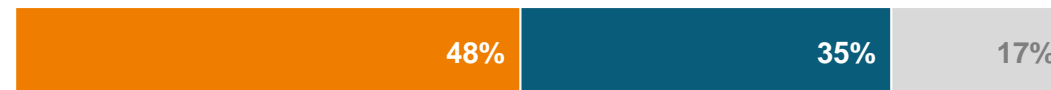
## Attitude towards private labels

POSITIVE | NEGATIVE | NEUTRAL | DON'T KNOW



## Preference:

### A-brands versus private labels





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**European overview**  
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**Country overview**  
*Branding & Love brands*



**Home improvement  
per category**

*All product categories are  
possible to choose*

## Best Known Power Tool Brands 2018

NR 1 per country

Full report provides full insights

Full report provides full insights

Full report provides full insights

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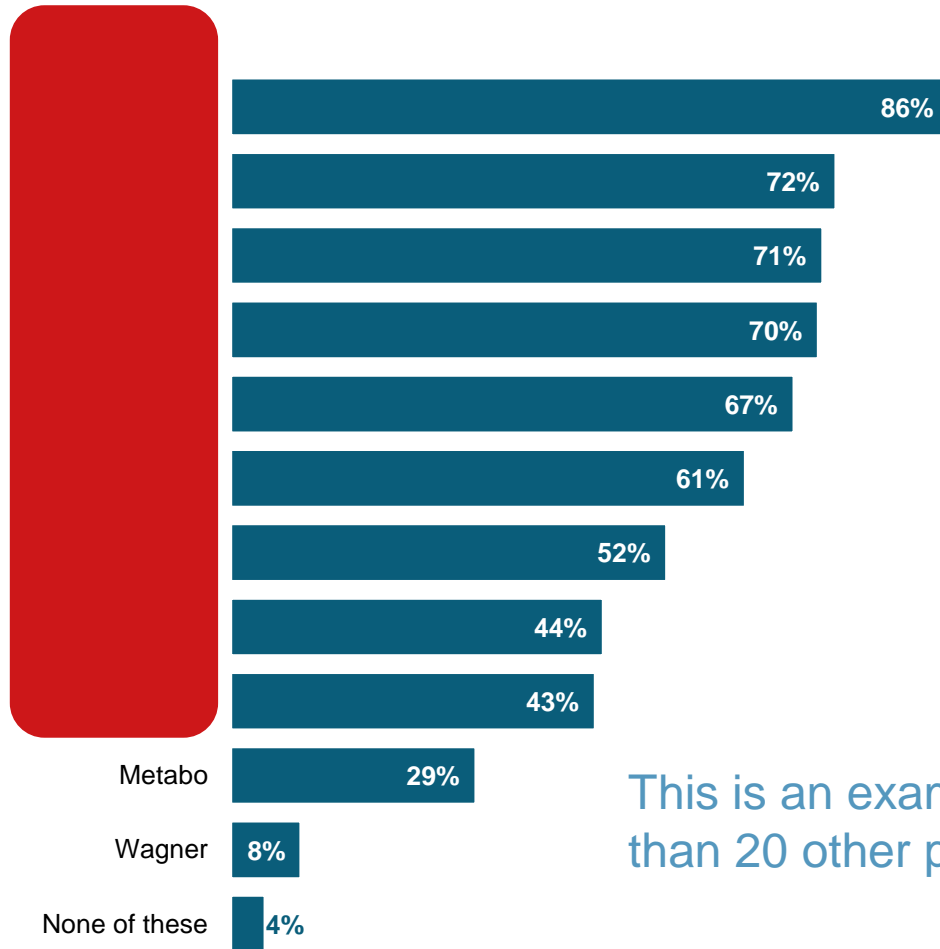
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This is an example of the power tools category, more than 20 other product categories are available



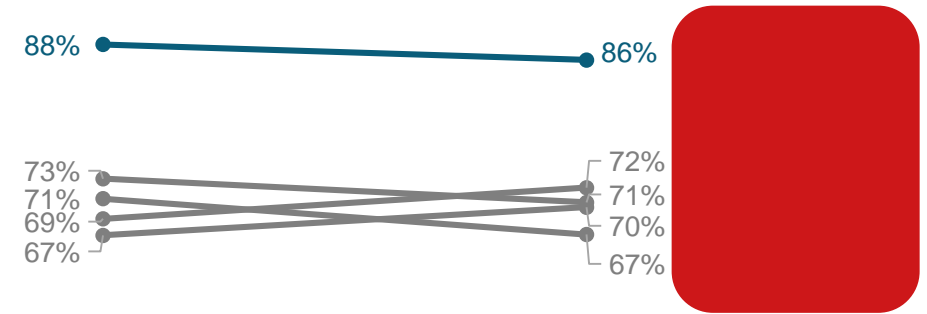


### 2018 Brand awareness (aided)



### Development '17-'18

Top-5 brands [based on awareness]



This is an example of the power tools category, more than 20 other product categories are available

# Country overview – Italy

Brand image



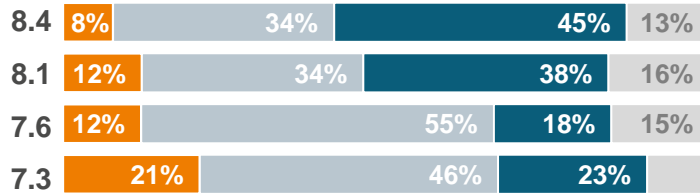
USP

## Measured brands



## General rating

Avg 0-6 | 7-8 | 9-10 | No opinion



This is an example of the power tools category, more than 20 other product categories are available

Avg 0-6 | 7-8 | 9-10 | No opinion

### Best quality

- Bosch
- Black & Decker
- Kärcher
- Wagner

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### Value/money

- Bosch
- Black & Decker
- Kärcher
- Wagner

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### Trust

- Bosch
- Black & Decker
- Kärcher
- Wagner

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### Easy to use

- Bosch
- Black & Decker
- Kärcher
- Wagner

Full report provides full insights



Q1: How would you rate the following brands in general? Q2: Can you tell for the following statements how well it applies to the brand(s)?  
(N based on the awareness – differs per brand)