



# European Home Improvement Monitor Q1 2023

Theme: Consumer needs & willingness to invest in sustainability

April 2023

# About European Home Improvement Monitor



**What** is happening in the European Home Improvement industry and **why?**

**3 KEY TRENDS** are being established:

- E-commerce
- Shift from DIY towards DIFM
- Changing consumer journey

Developments are reported **by country** and **by product category**.



**2023**  
**IN-DEPTH TOPICS**

Q1: **Orientation**

Consumer needs & willingness to invest in sustainability

Q2: **Purchase channels**

Online performance of DIY stores

Q3: **Branding**

Evolution of private labels

Q4: **Do-It-Yourself or Do-It-For-Me**

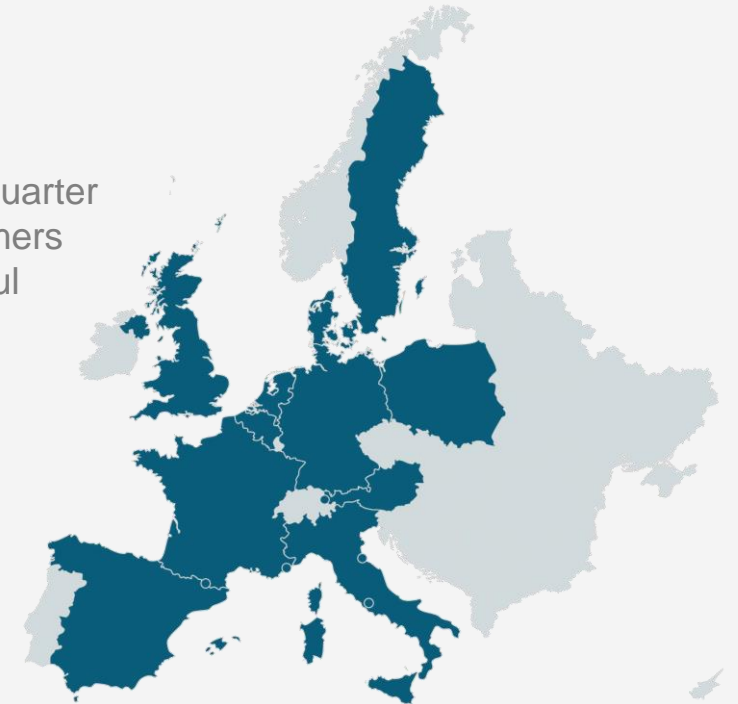
Plans and expectations for next year



**METHODOLOGY**

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

Insights are provided for **11** European countries



**COSTS**

**€ 3,150 Single report**

11 countries/ 1 category

**€ 9,450 Annual subscription**

4 reports/ 11 countries/ 1 category

Adding a product category or a country to your subscription is possible.

# 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-makership** 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.

## PROJECT TEAM



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Theme: Sustainability

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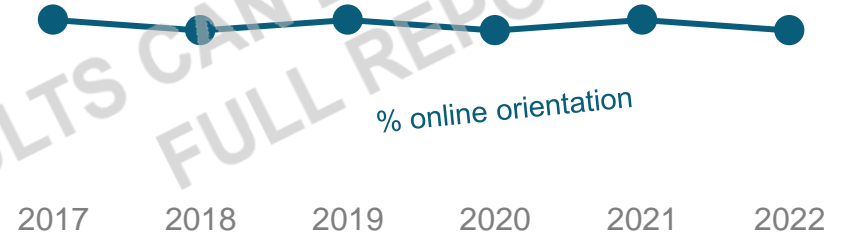
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### Online orientation

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

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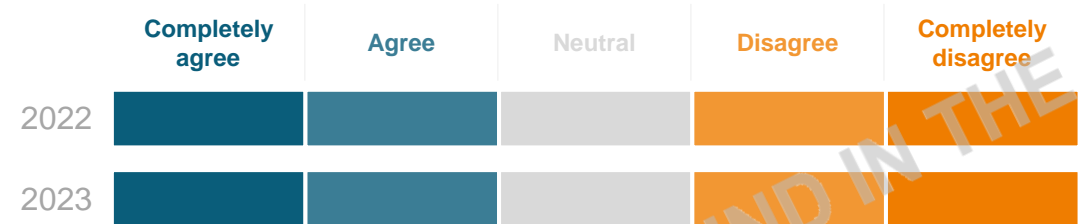
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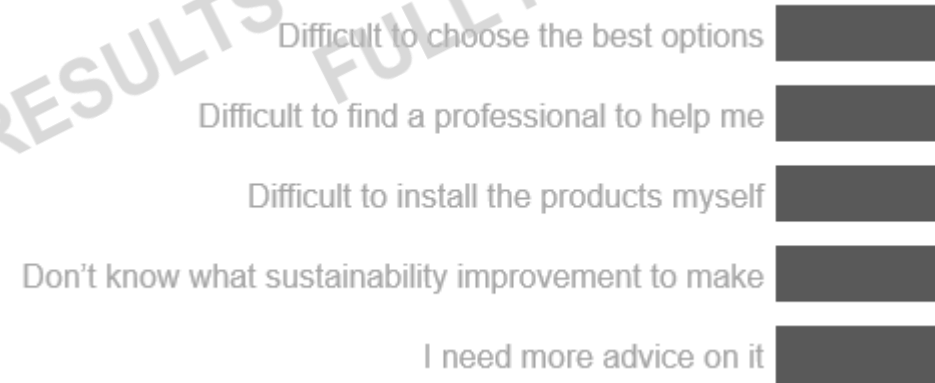
### Seeking for sustainability improvements

I am actively looking for ways to improve the energy efficiency of my home



### Sustainability barriers

What are the main barriers for you to make more sustainability improvements for your home?





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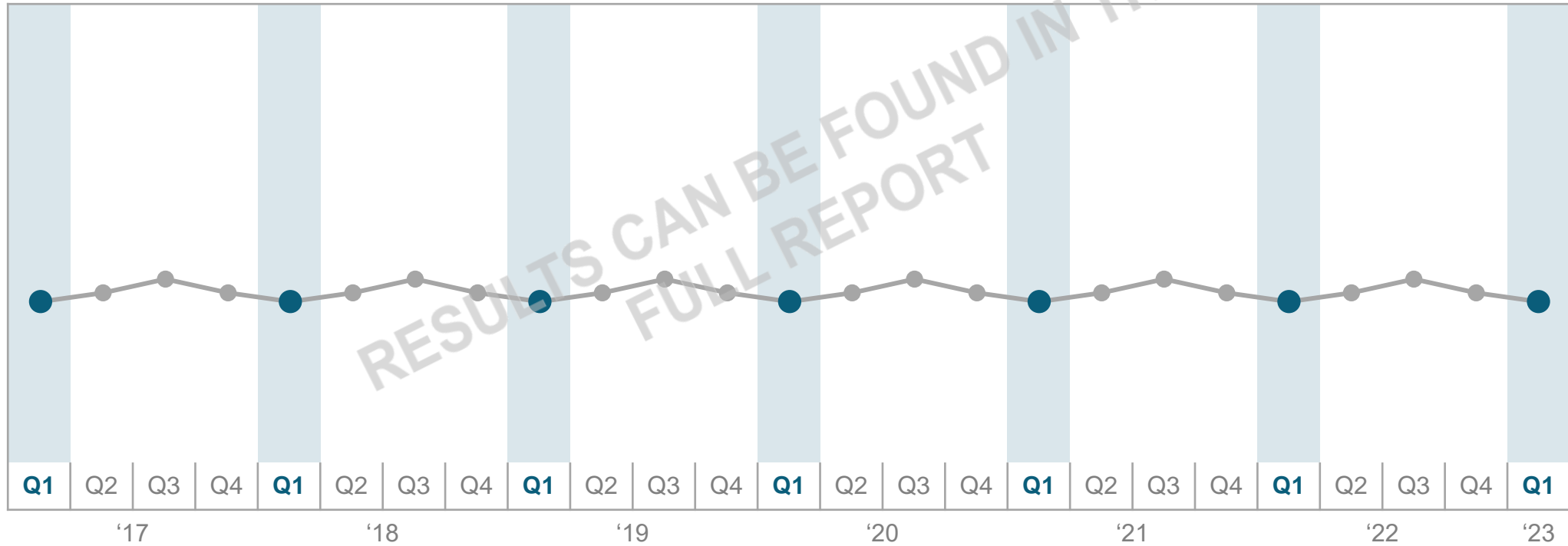
United Kingdom





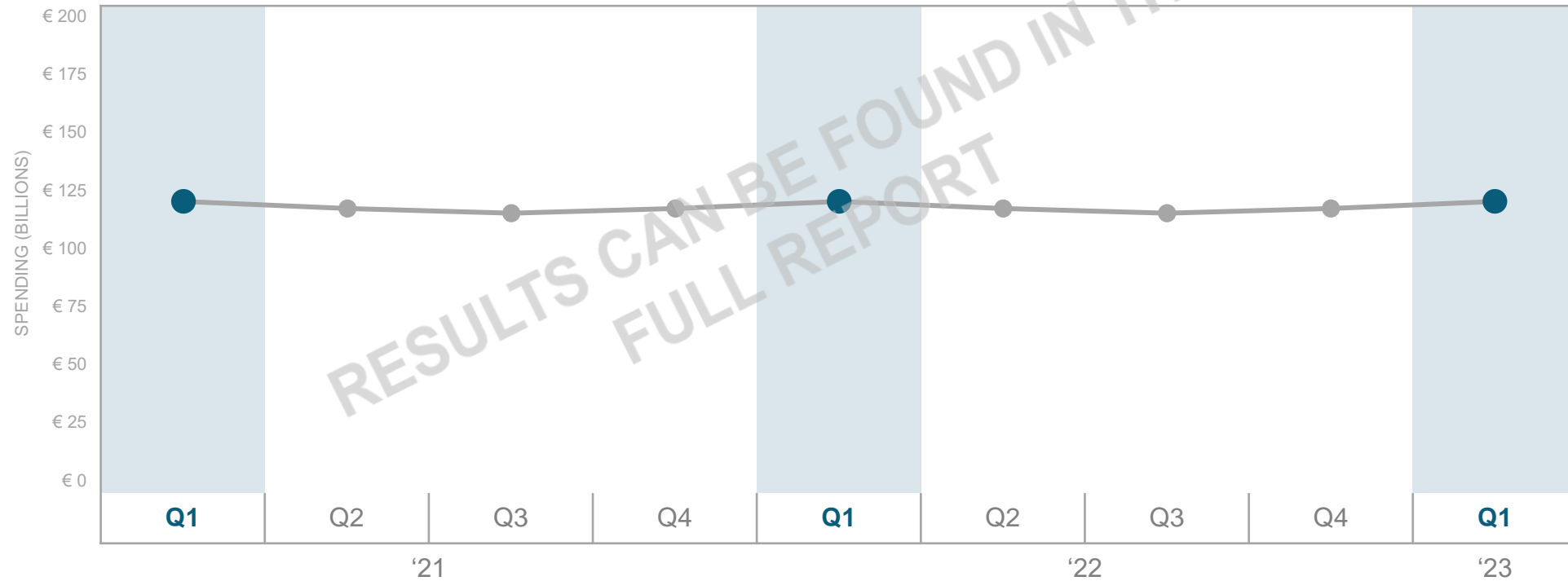
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Share of households that have done a home improvement job  
2023 Q1



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**European spending on labour + material**  
2023 Q1

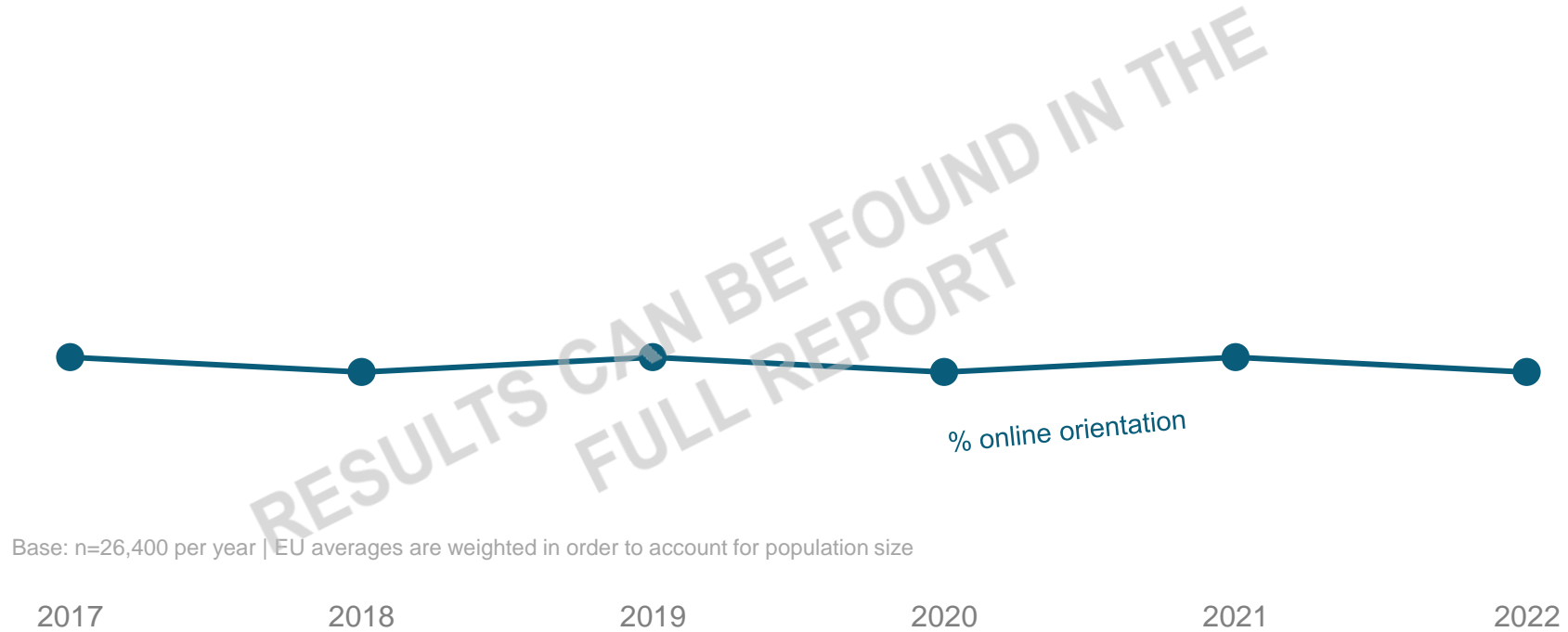


\*Only home improvement jobs in which less than 10k (in euros) was spent are included in the calculation.

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## Online orientation

Did you get information about the product online?



\*The measurement includes the following product categories:

bath  
bathroom furniture  
boiler  
dormer window  
flooring products

lock  
paint  
power tools  
roof window  
sandpaper

sealants  
shower drain  
shower enclosures  
shower set / shower head  
shower tray

tapes  
taps & mixers  
tile adhesive  
toilet  
wallpaper

washbasin  
whirlpool  
window decoration

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## Online orientation

Did you get information about the product online?



Base: n=2,400 per year per country

\*The measurement includes the following product categories:

bath  
bathroom furniture  
boiler  
dormer window  
flooring products

lock  
paint  
power tools  
roof window  
sandpaper

sealants  
shower drain  
shower enclosures  
shower set / shower head  
shower tray

tapes  
taps & mixers  
tile adhesive  
toilet  
wallpaper

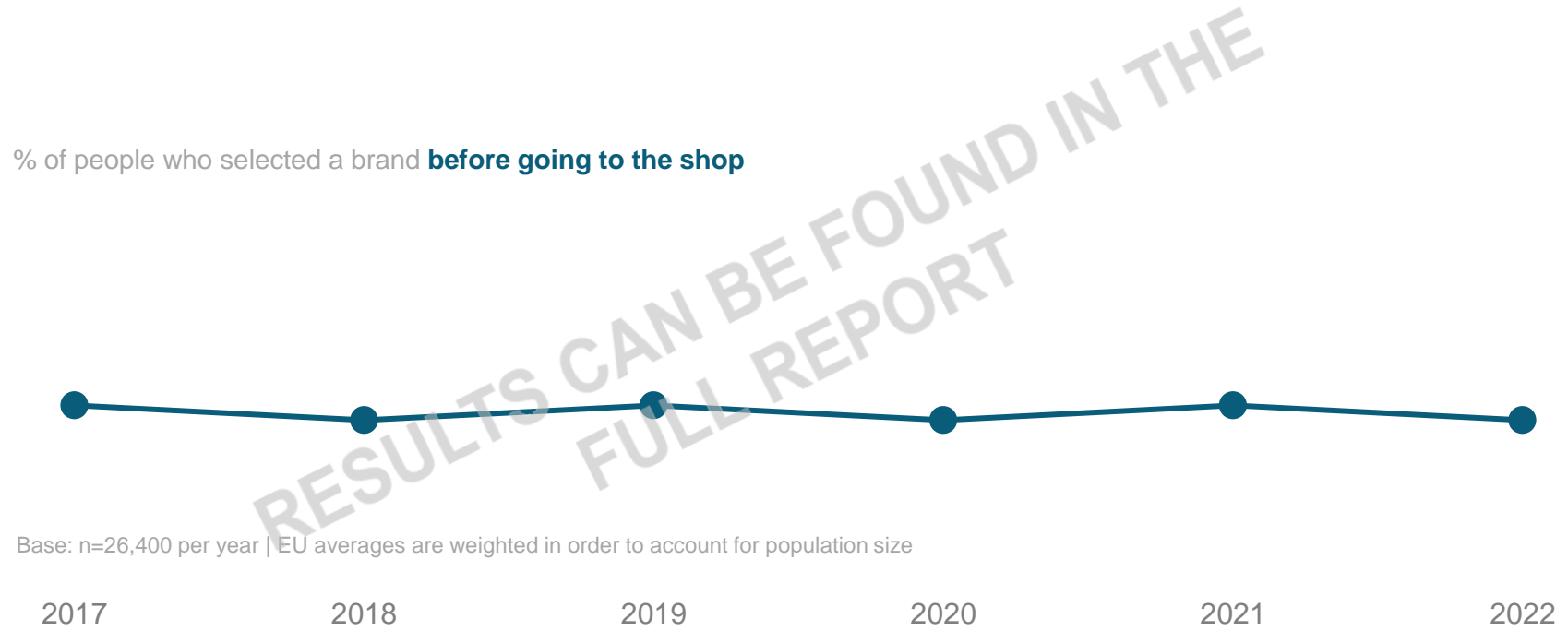
washbasin  
whirlpool  
window decoration

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## 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?

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



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

\*The measurement includes the following product categories:

bath  
bathroom furniture  
boiler  
dormer window  
flooring products

lock  
paint  
power tools  
roof window  
sandpaper

sealants  
shower drain  
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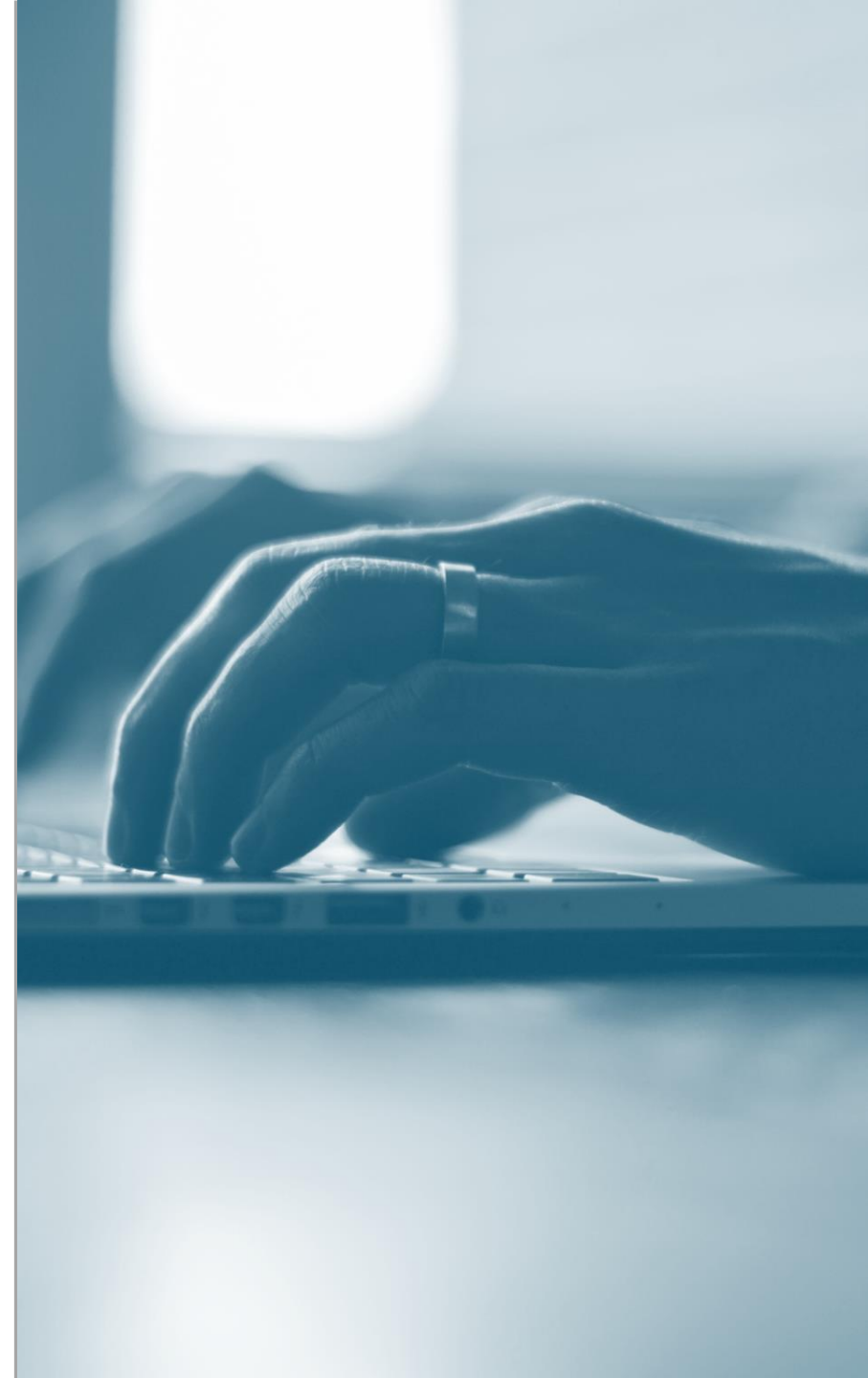
Netherlands

Poland

Spain

Sweden

United Kingdom



## Theme questions

In this chapter, we take a deeper dive into Consumer needs & willingness to invest in sustainability. The respondents were asked the following:

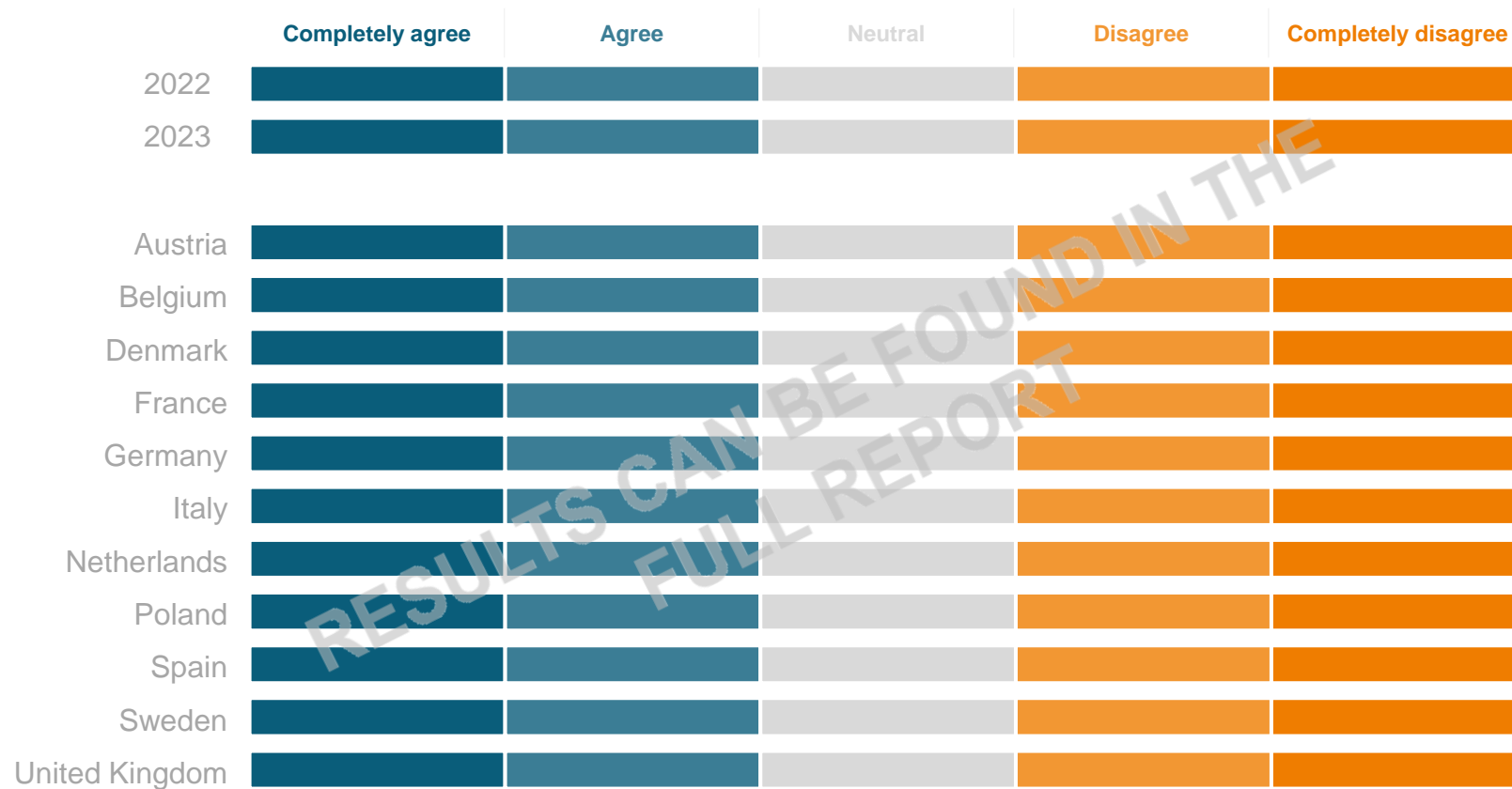


- Which of the following measures to improve sustainability has been applied to your house?
- Which of the following **sustainability improvements** would you be interested in applying in your house?
- What are the main **drivers** for more sustainability improvements to your home?
- How would you **orientate** on sustainability improvements for your home?
- What are the main **barriers** for you to take more sustainability improvements for your home?
- When buying products in a DIY store, do you care about **buying environmentally sustainable products**?
- When buying DIY products, what are the most **important sustainability aspects** to consider?
- How important are sustainability aspects when purchasing the following products?
- Which **DIY store** do you associate the most with sustainability?
- How likely is it that sustainability aspects will **influence your choice** for a **DIY store** to purchase home improvement products?
- How likely is it that sustainability aspects will **influence your choice** for a **DIY product brand** to purchase home improvement products?
- What type of **heat pump** do you own? / What type of heat pump do you plan to purchase?
- What other adjustments did you have related to the installation of the heat pump?
- Looking forward to the months April-June, do you expect the number of home improvement jobs in or outside your home to be more, the same or less than in the same period last year?

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**Energy efficiency**

My home is already very energy efficient

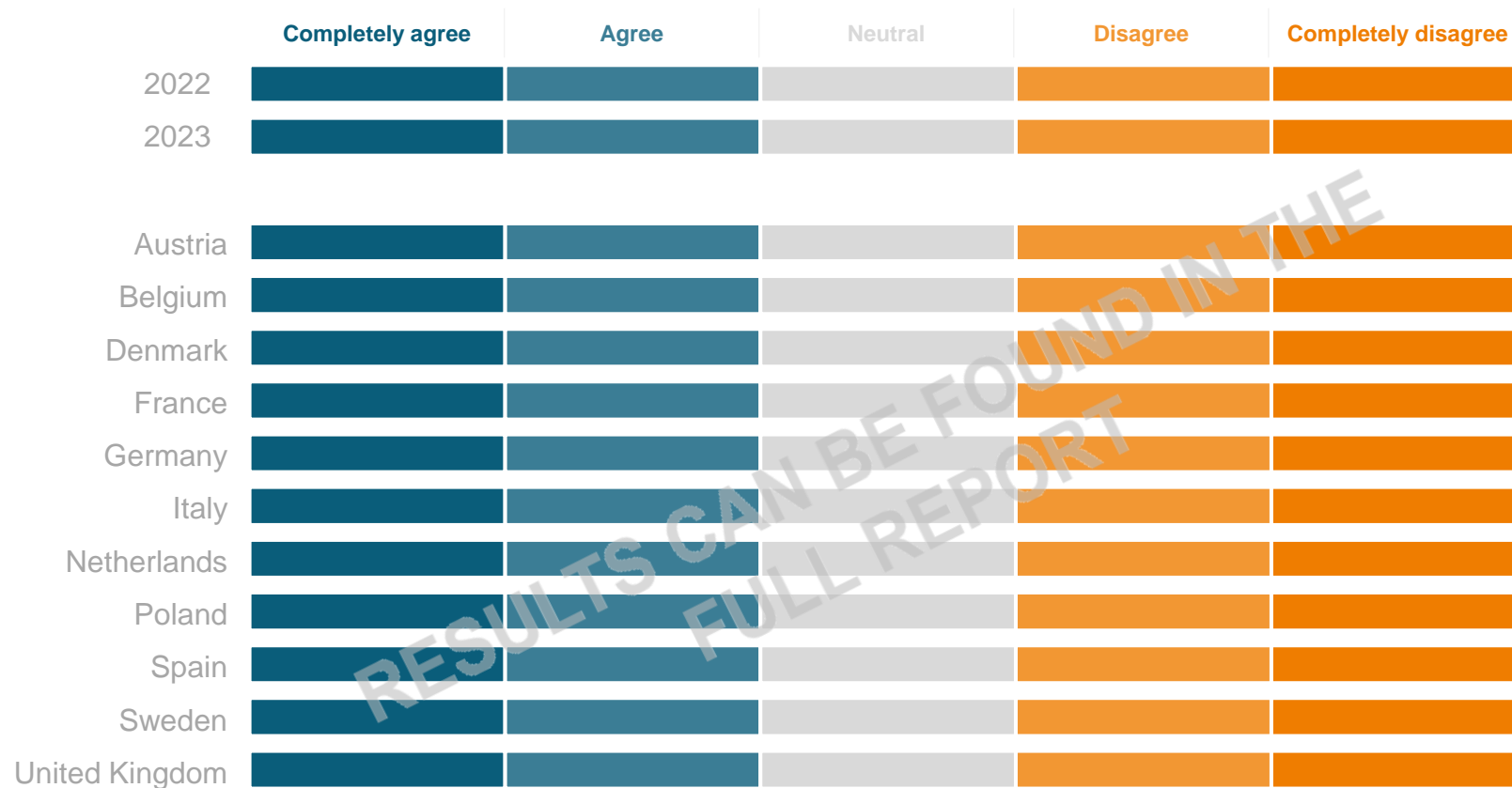




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**Seeking for sustainability improvements**

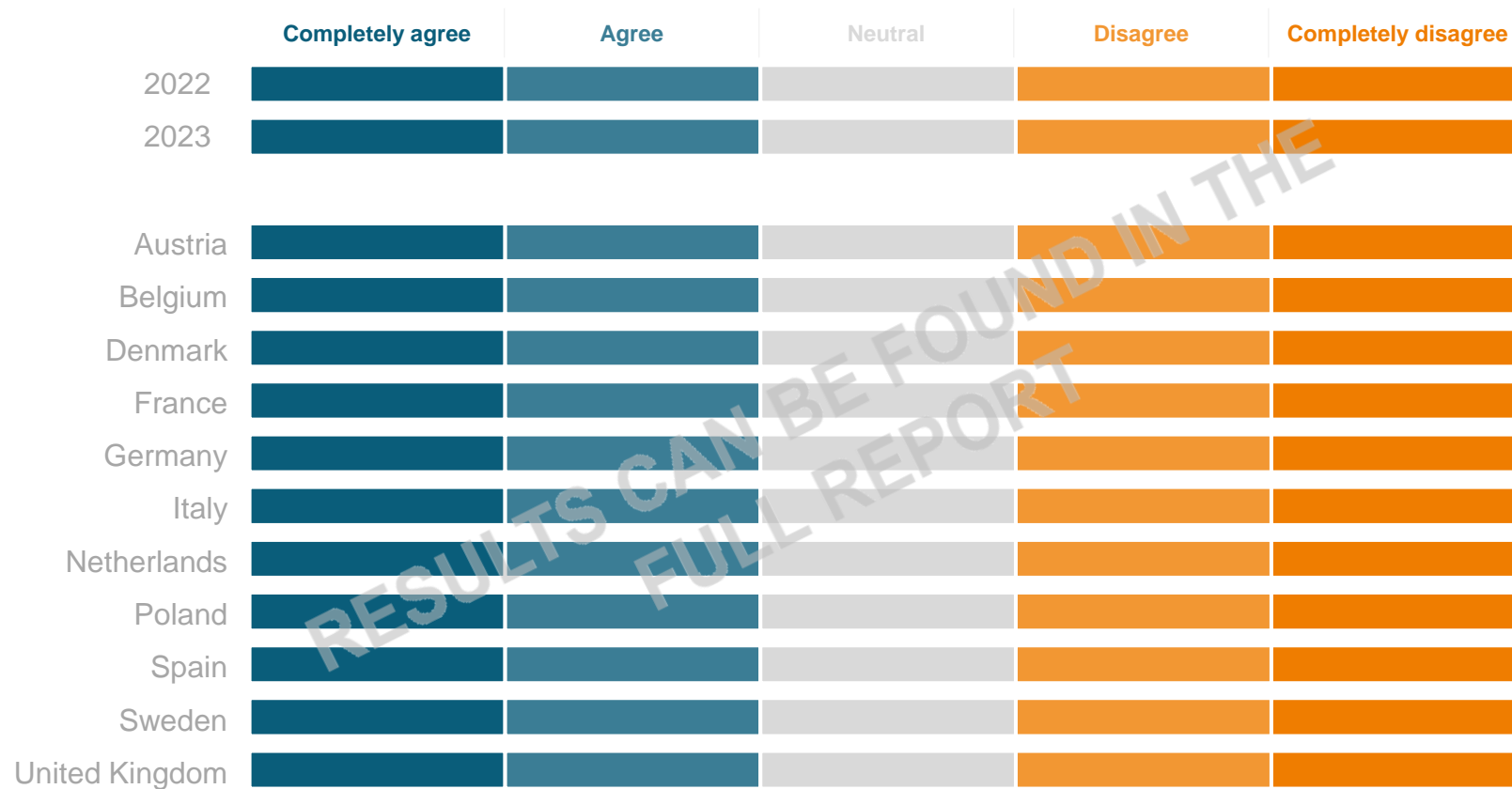
I am actively looking for ways to improve the energy efficiency of my home



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**Sustainability investments**

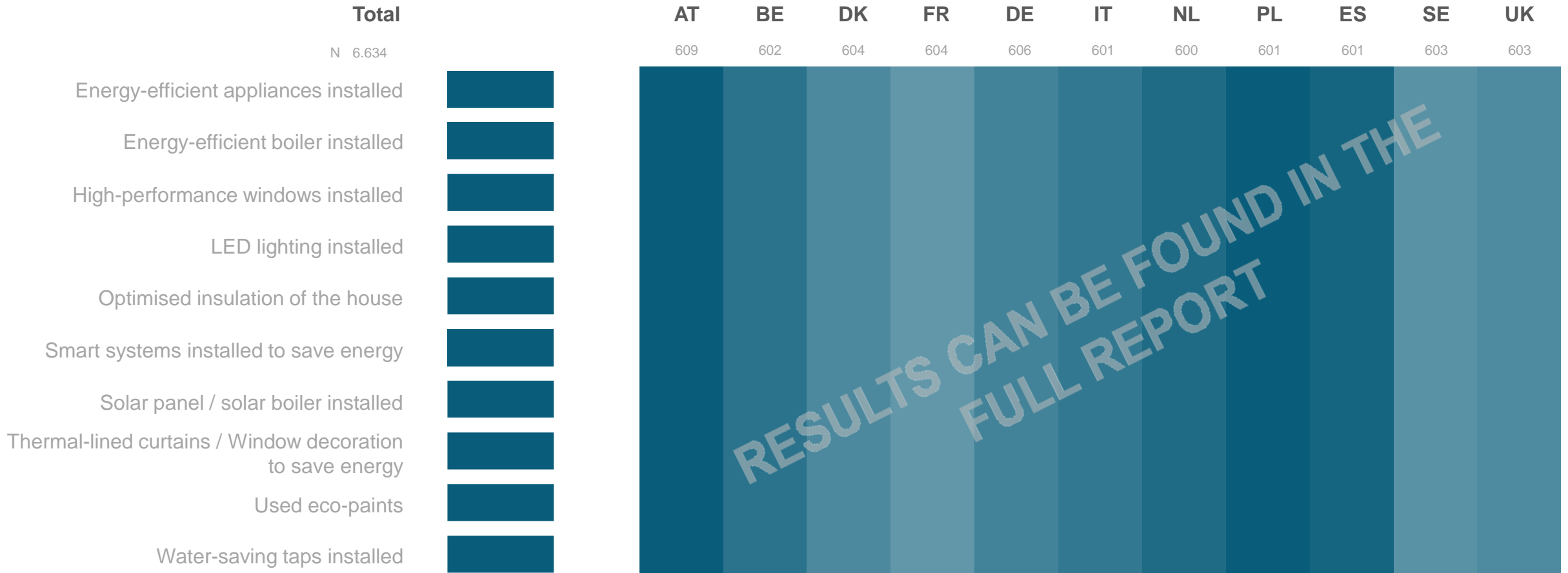
I will probably invest in making my house more energy efficient in the next 12 months



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## Applied sustainability measures – Top 10

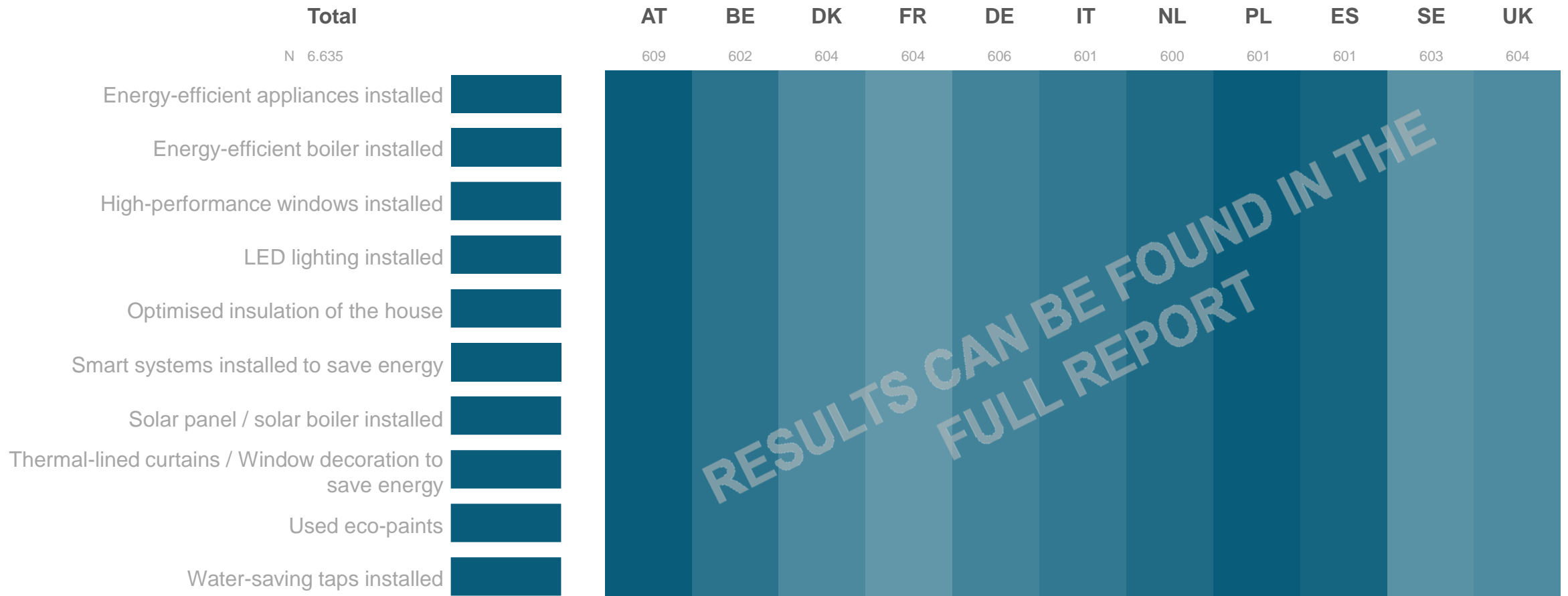
Which of the following measures to improve sustainability has been applied to your house?



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## Interest in sustainability measures – Top 10

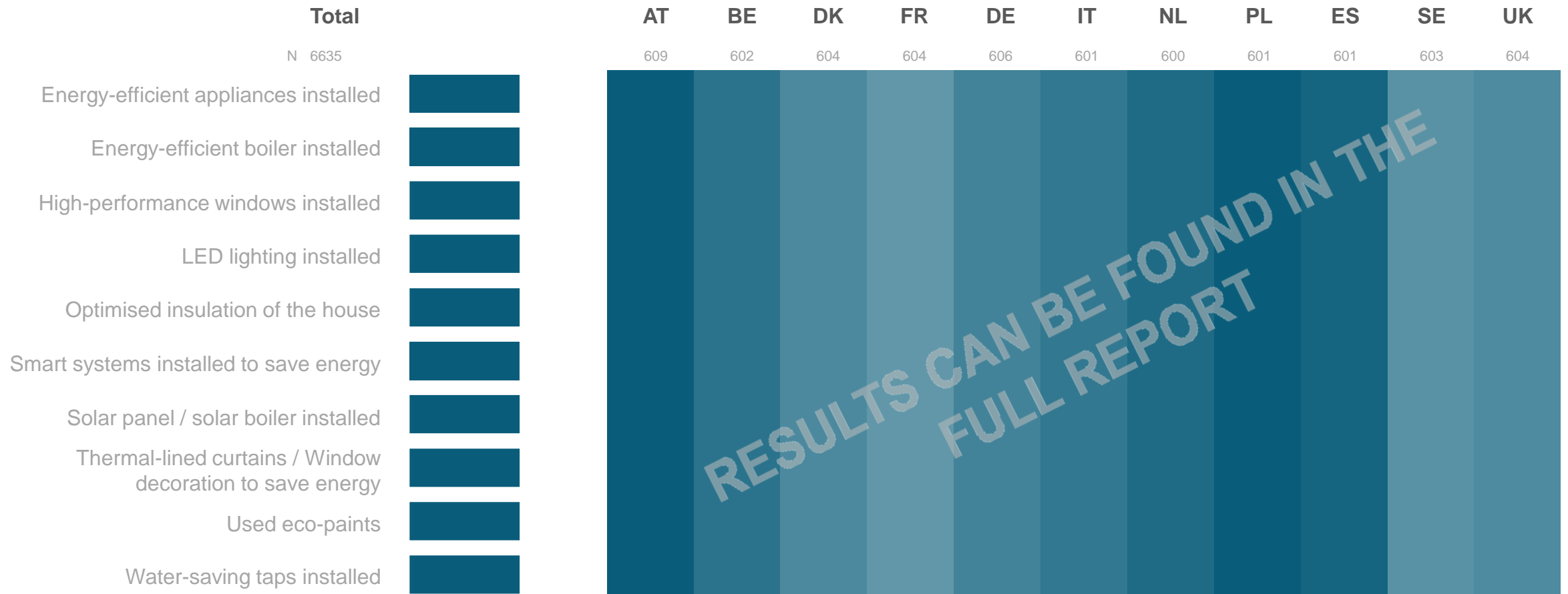
Which of the following sustainability improvements would you be interested in applying in your house?



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## Planned sustainability measures – Top 10

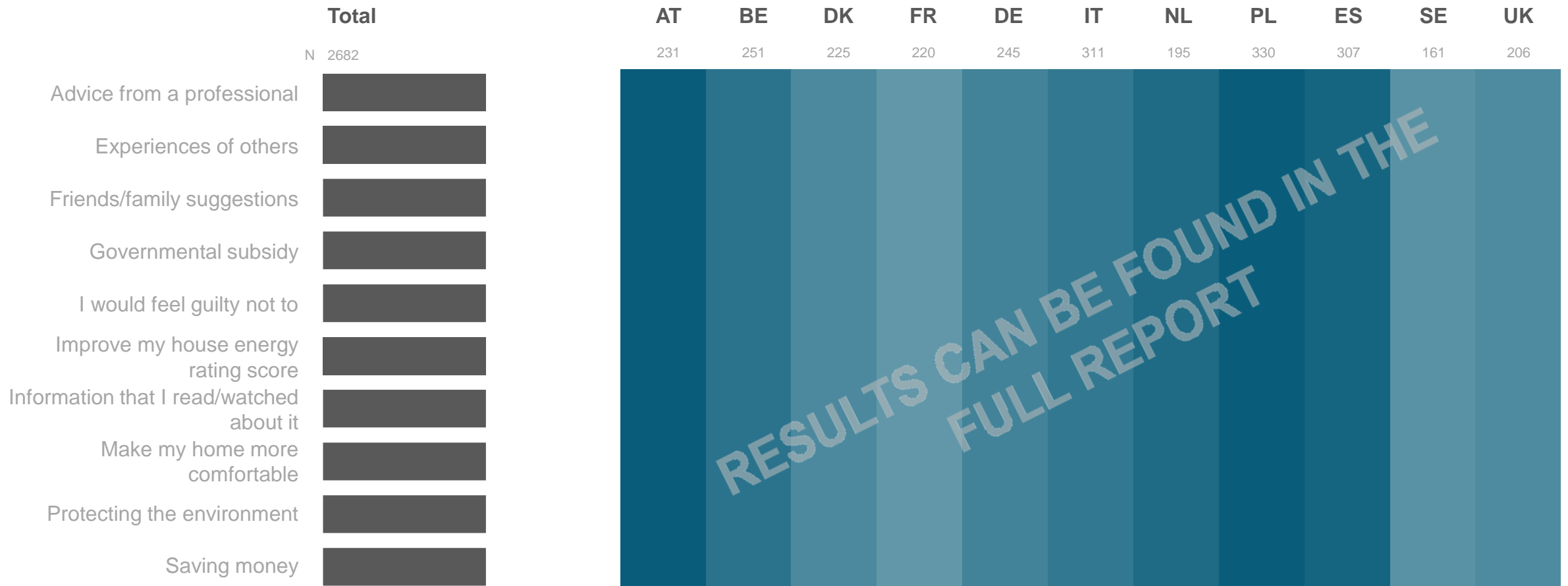
Which of these sustainability improvements do you expect to apply within the next 12 months?



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## Sustainability drivers

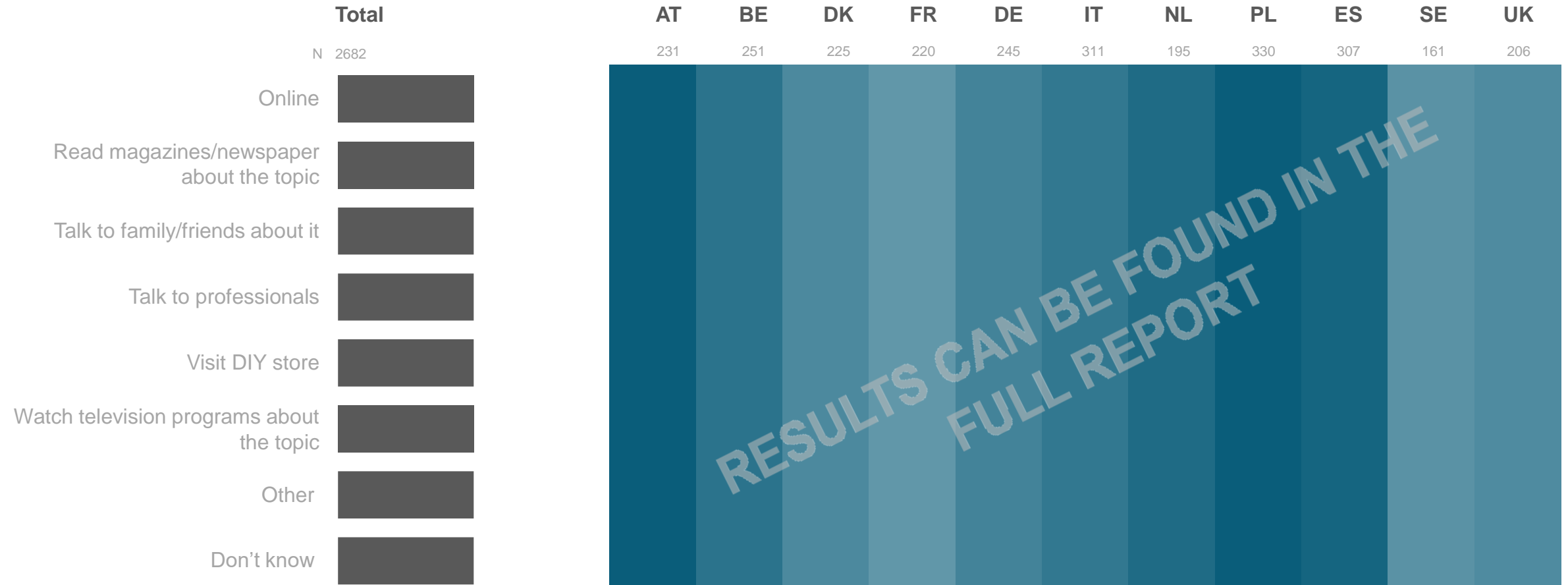
What are the main drivers for more sustainability improvements to your home?



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## Sustainability orientation

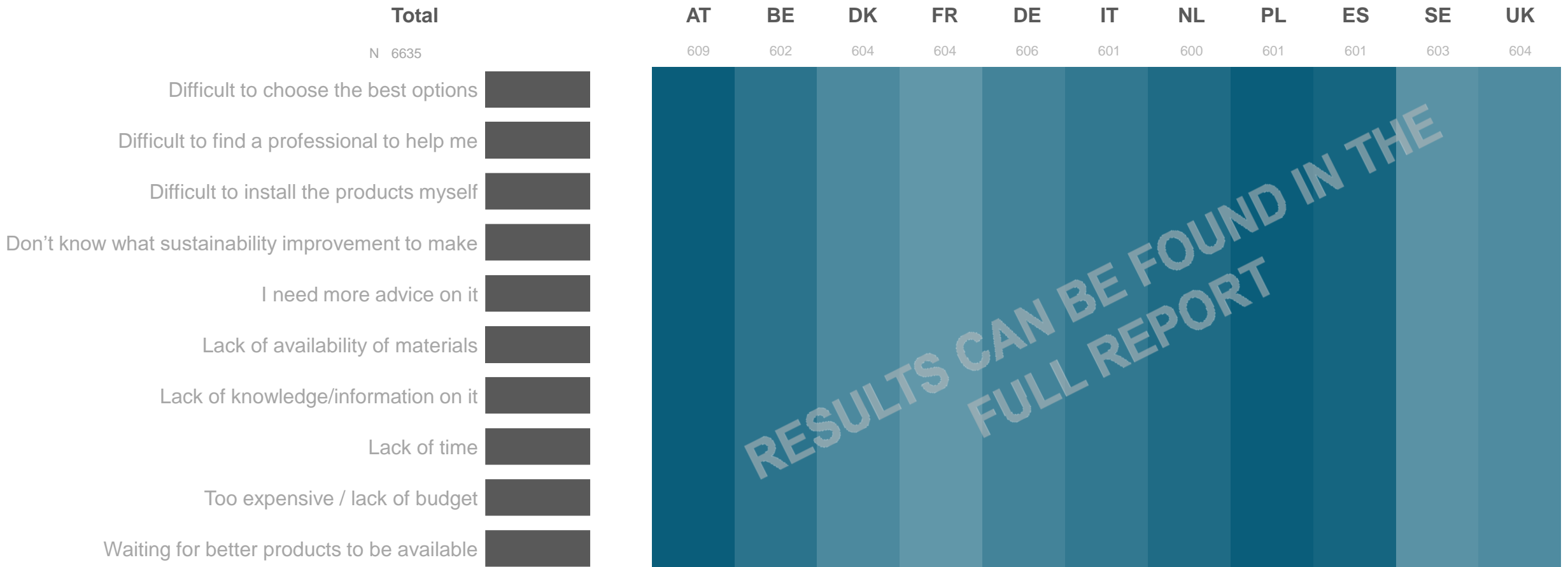
How would you orientate on sustainability improvements for your home?



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## Sustainability barriers

What are the main barriers for you to take more sustainability improvements for your home?

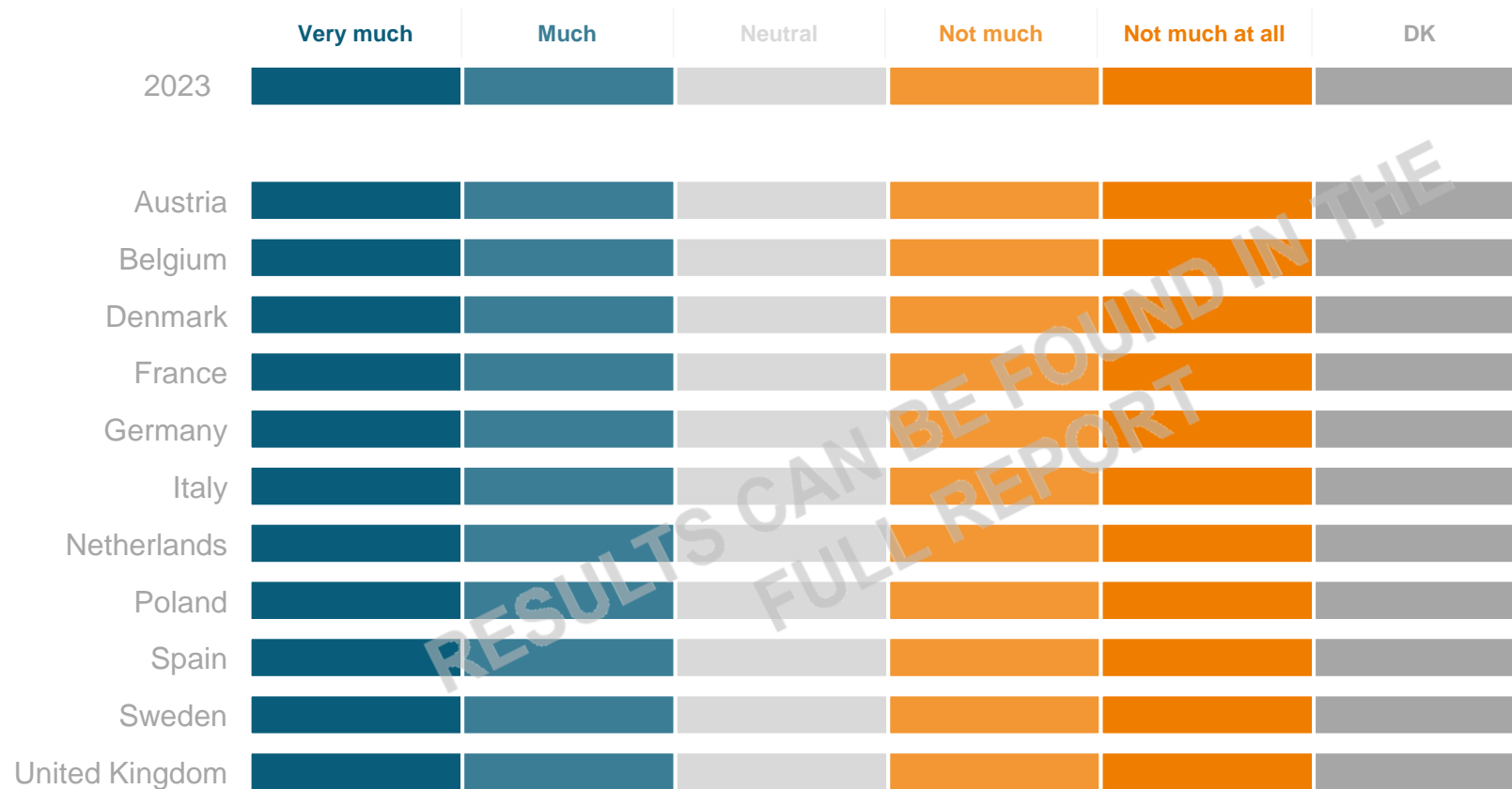




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**Sustainable products**

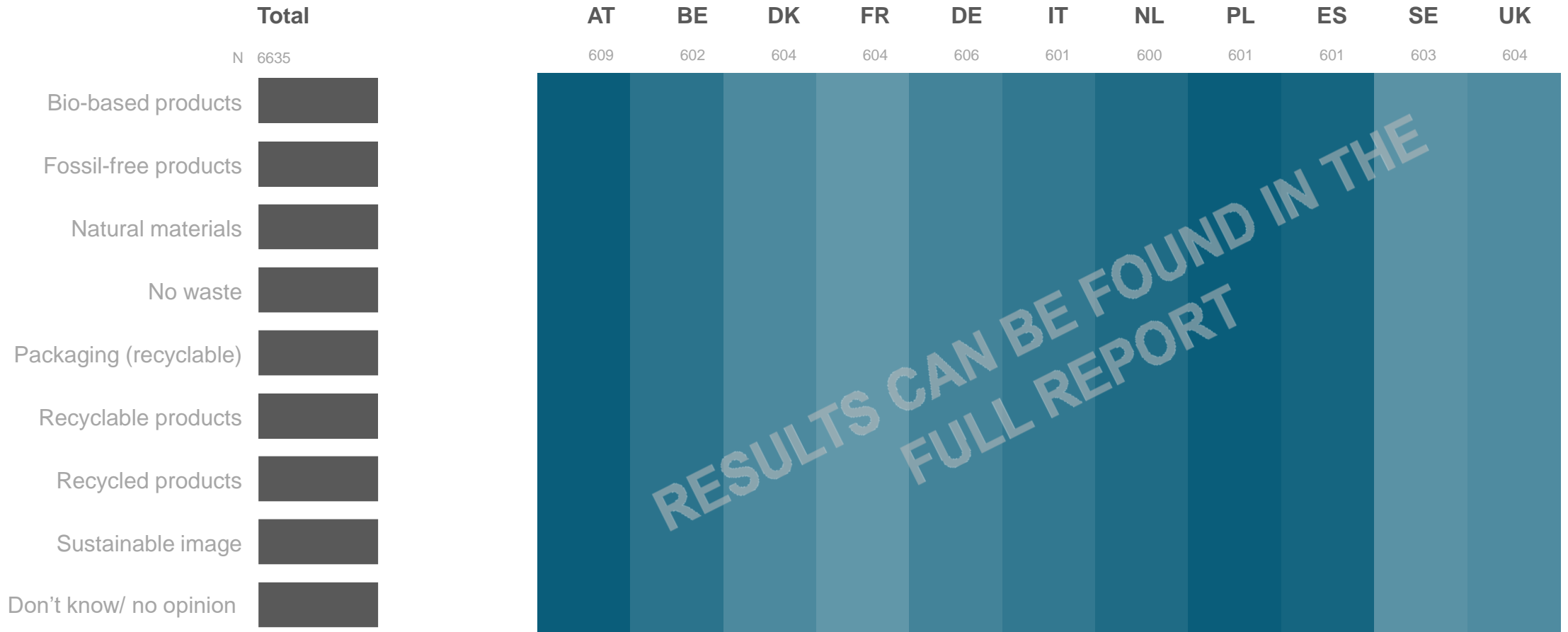
When buying products in a DIY store, do you care about buying environmentally sustainable products?



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## Sustainability aspects

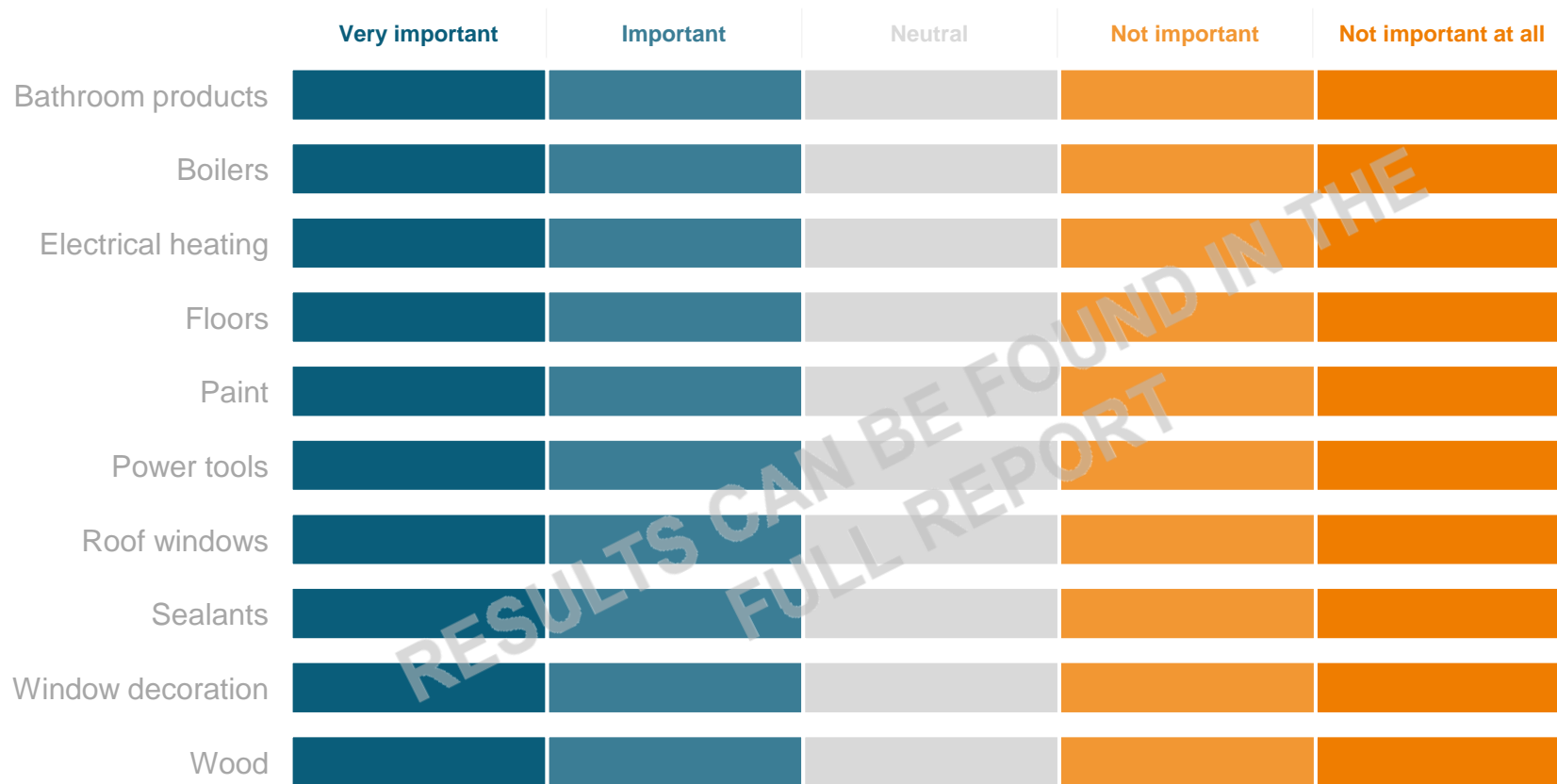
When buying DIY products, what are the most important sustainability aspects to consider?



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**Sustainable products**

How important are sustainability aspects when purchasing the following products?



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## DIY store associated with sustainability

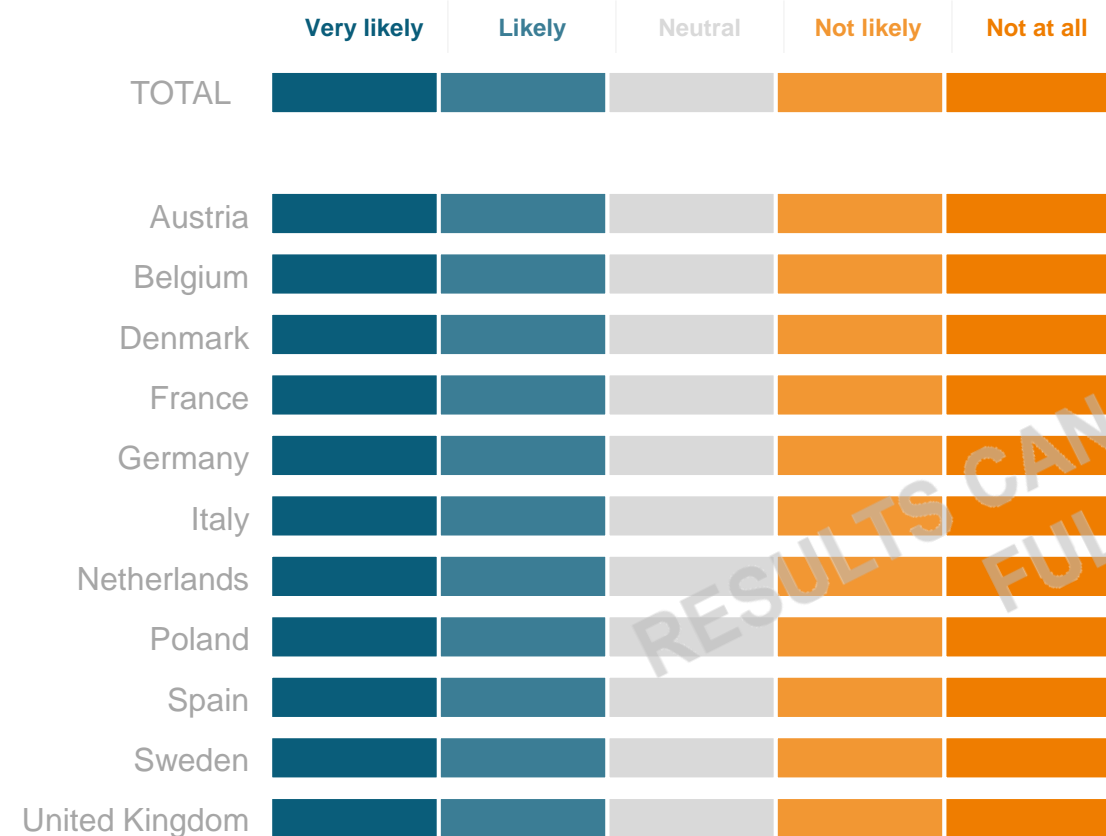
Which DIY store do you associate the most with sustainability?



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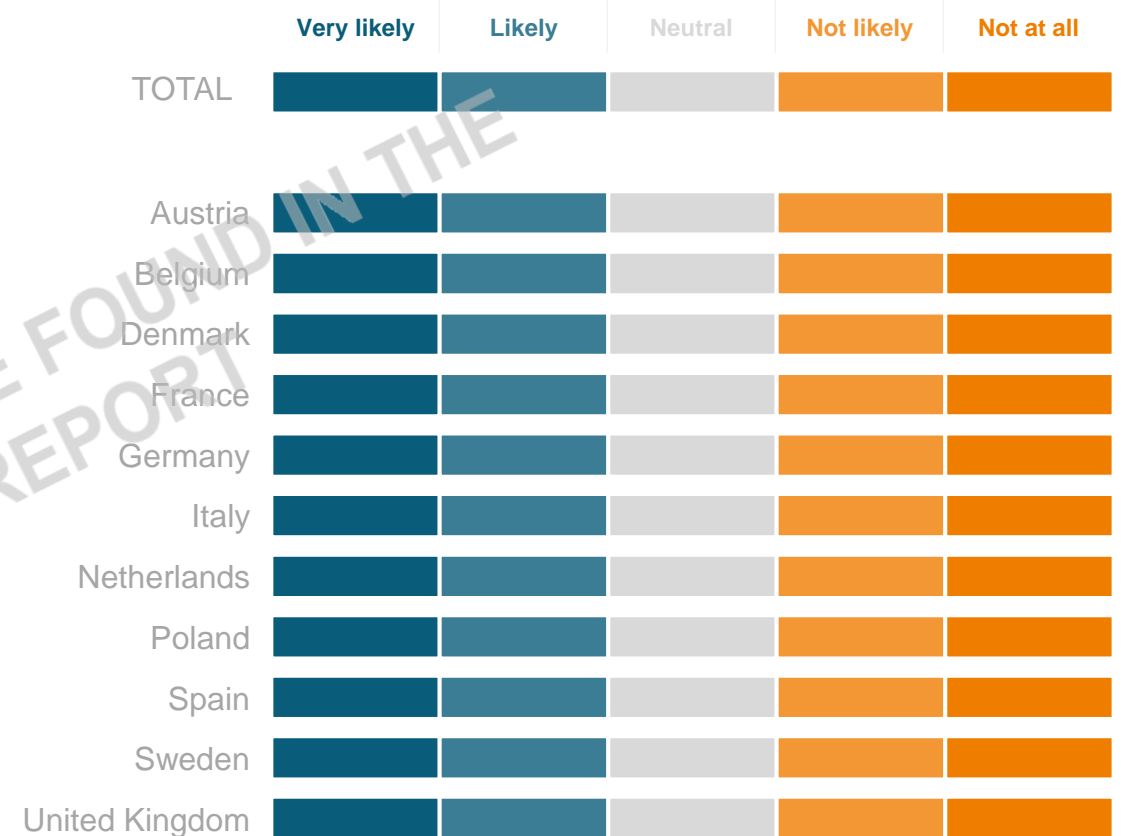
## Sustainability influence on store

How likely is it that sustainability aspects will influence your choice for a DIY store to purchase home improvement products?



## Sustainability influence on brand

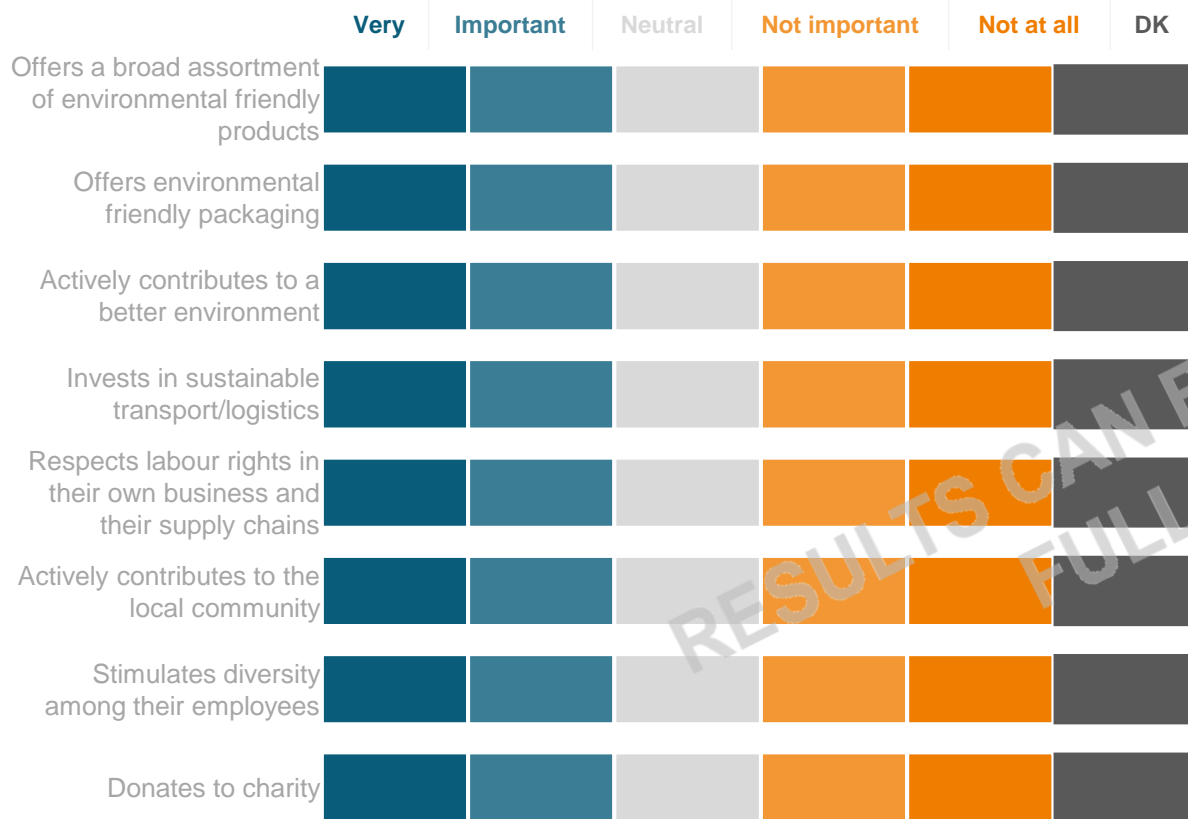
How likely is it that sustainability aspects will influence your choice for a DIY product brand to purchase home improvement products?



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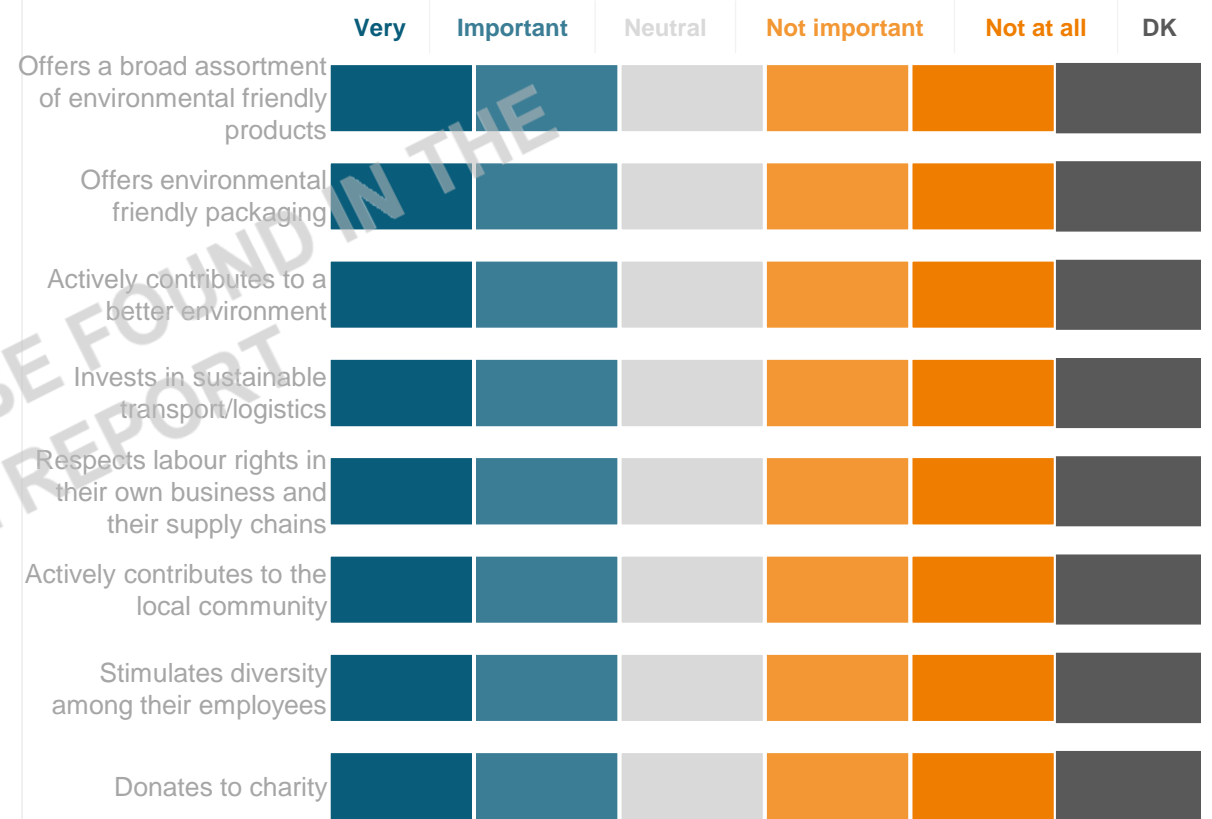
## DIY store aspects

To what degree is it important for you that a DIY store:



## DIY product brand aspects

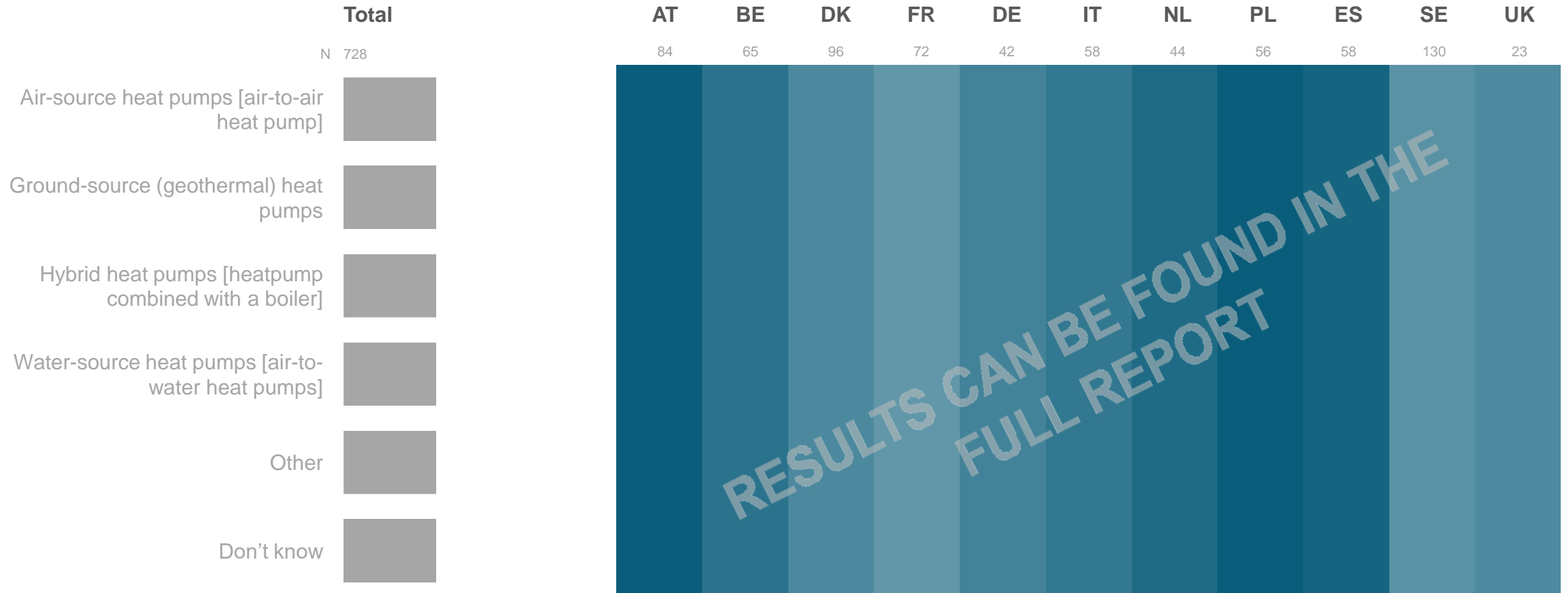
To what degree is it important for you that a DIY product brand:



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**Owned heat pump**

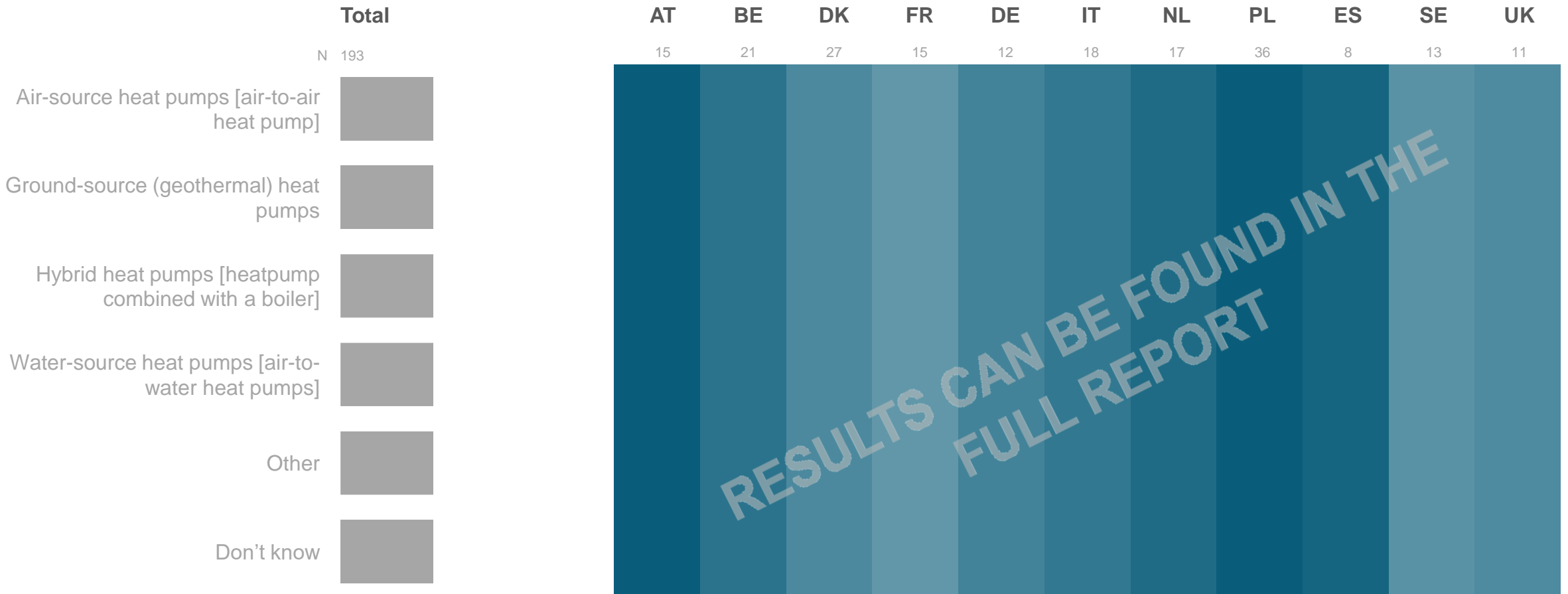
What type of heat pump do you own?



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**Heat pump – planned purchase**

What type of heat pump do you plan to purchase?

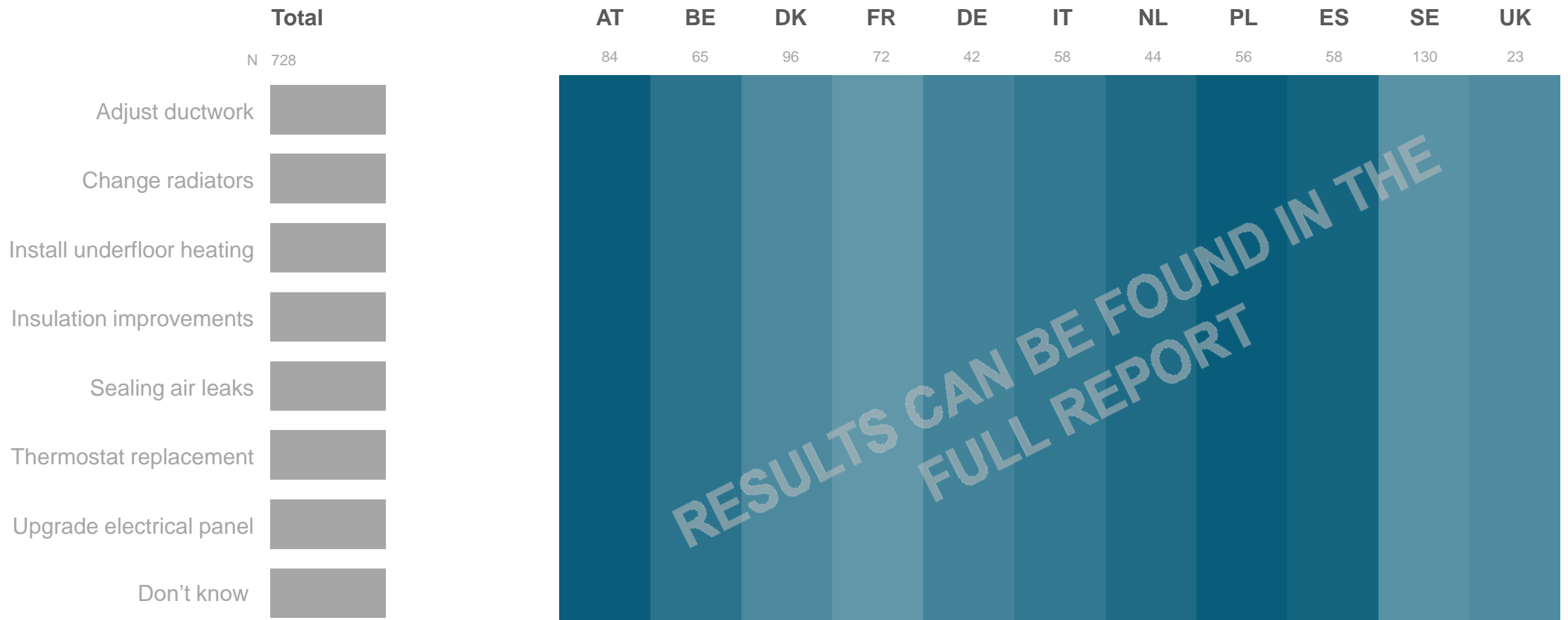




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**Heat pump – other related adjustments**

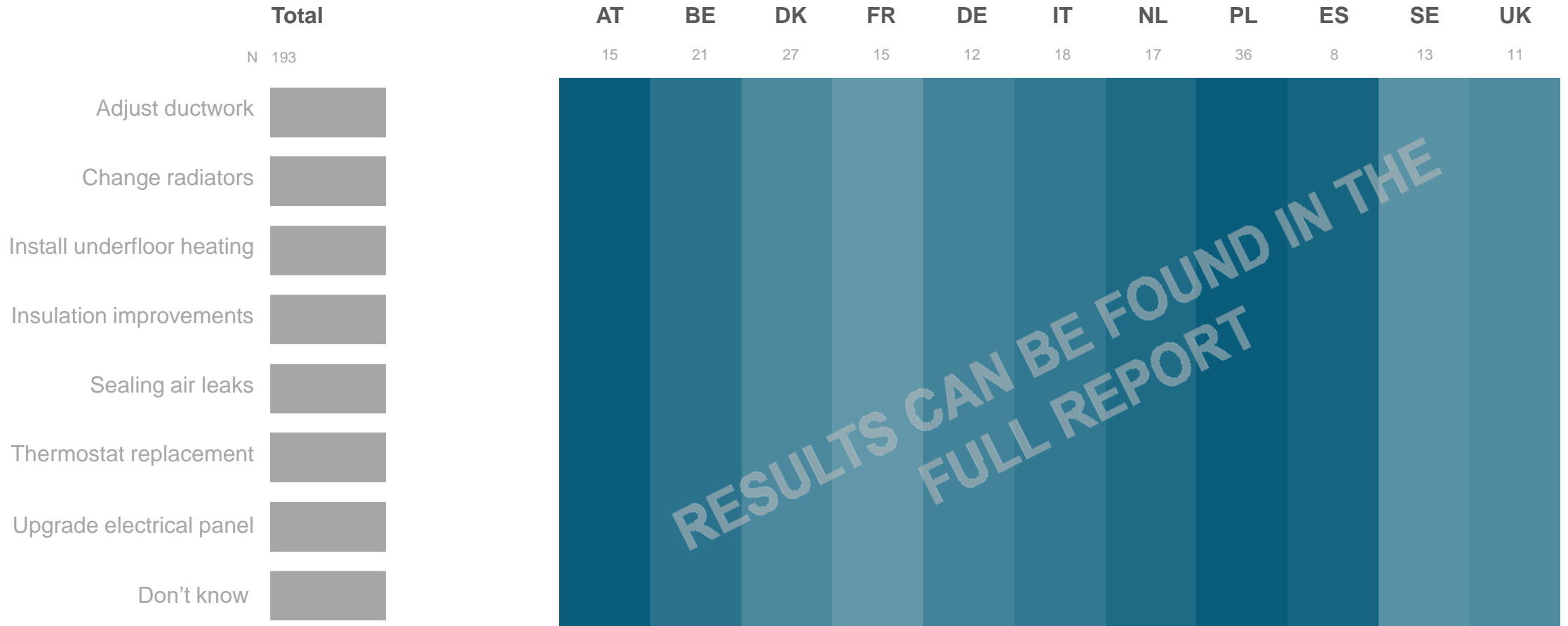
What type of other adjustments did you have related to the installation of the heat pump in your house?



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## Heat pump – other planned adjustments

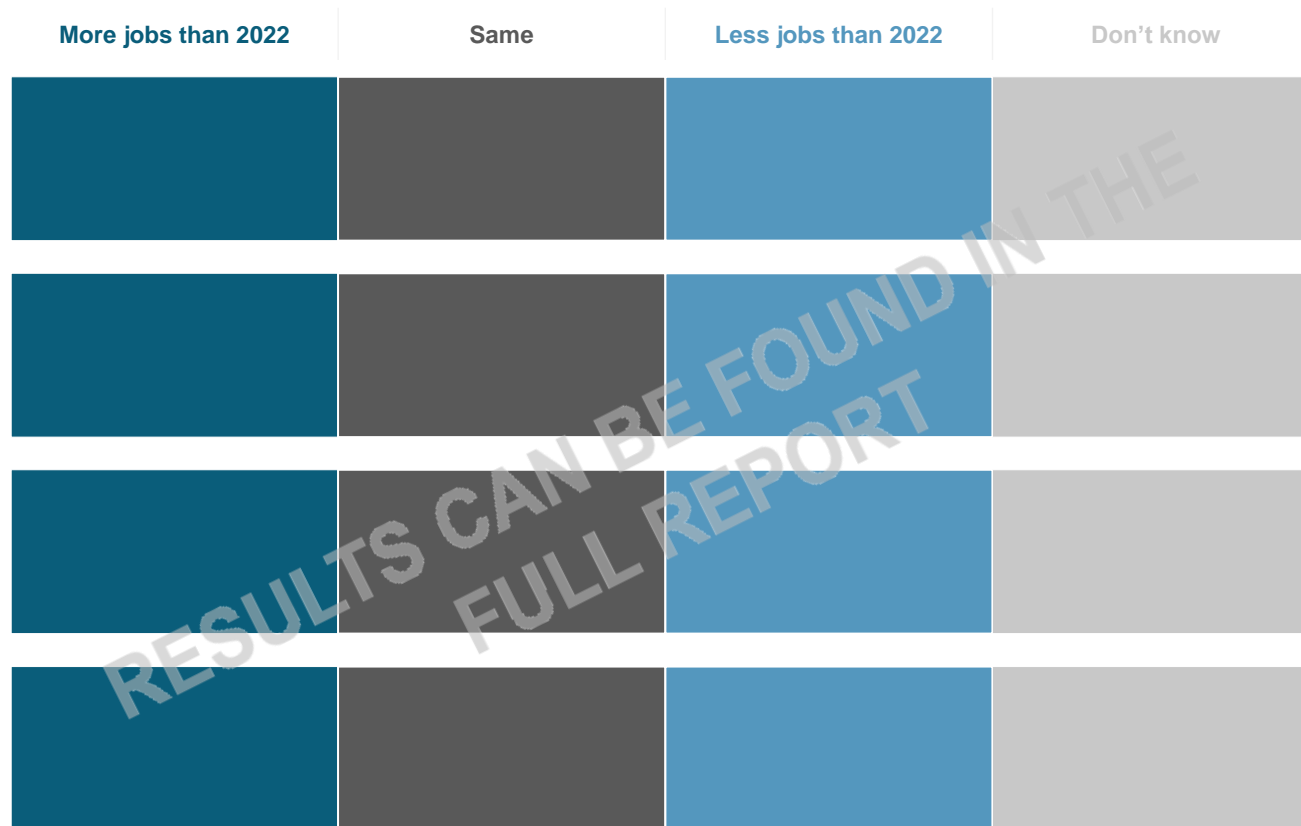
What type of other adjustments do you expect to have related to the installation of the heat pump in your house?



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## Outlook on home improvement

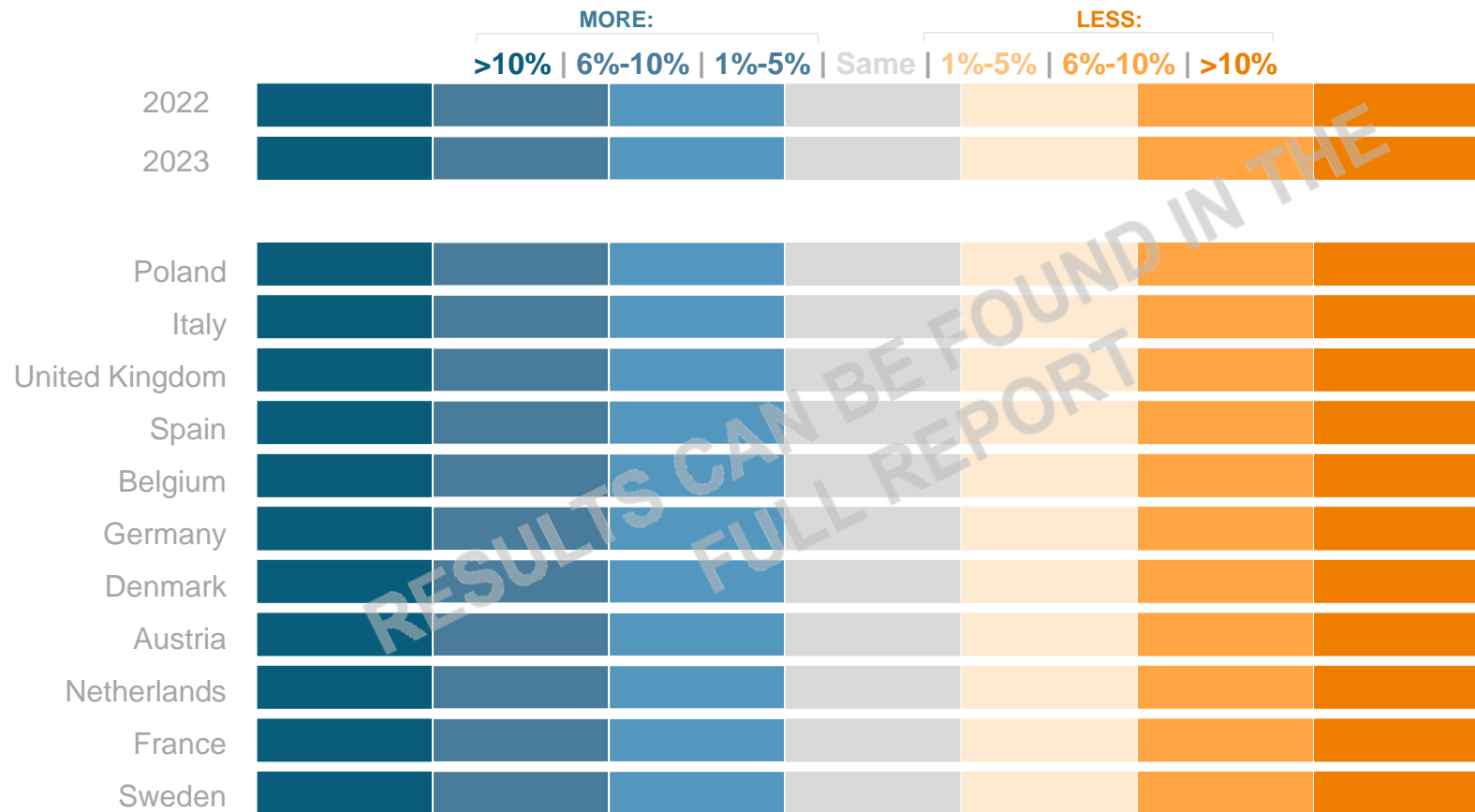
Looking forward to the months April-June, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than in the same period last year?



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## Spending on improvement jobs in next year

To what degree do you expect to spend more or less money on home improvement in 2023 compared to 2022?



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# AUSTRIA

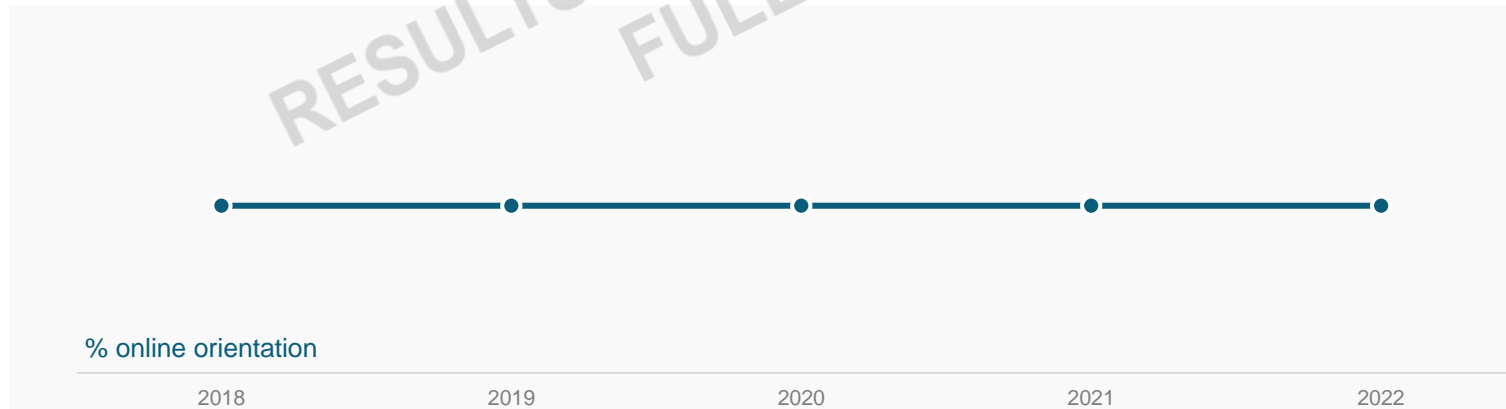
## Share of households that did a home improvement job

**AUSTRIA**  
EU AVERAGE

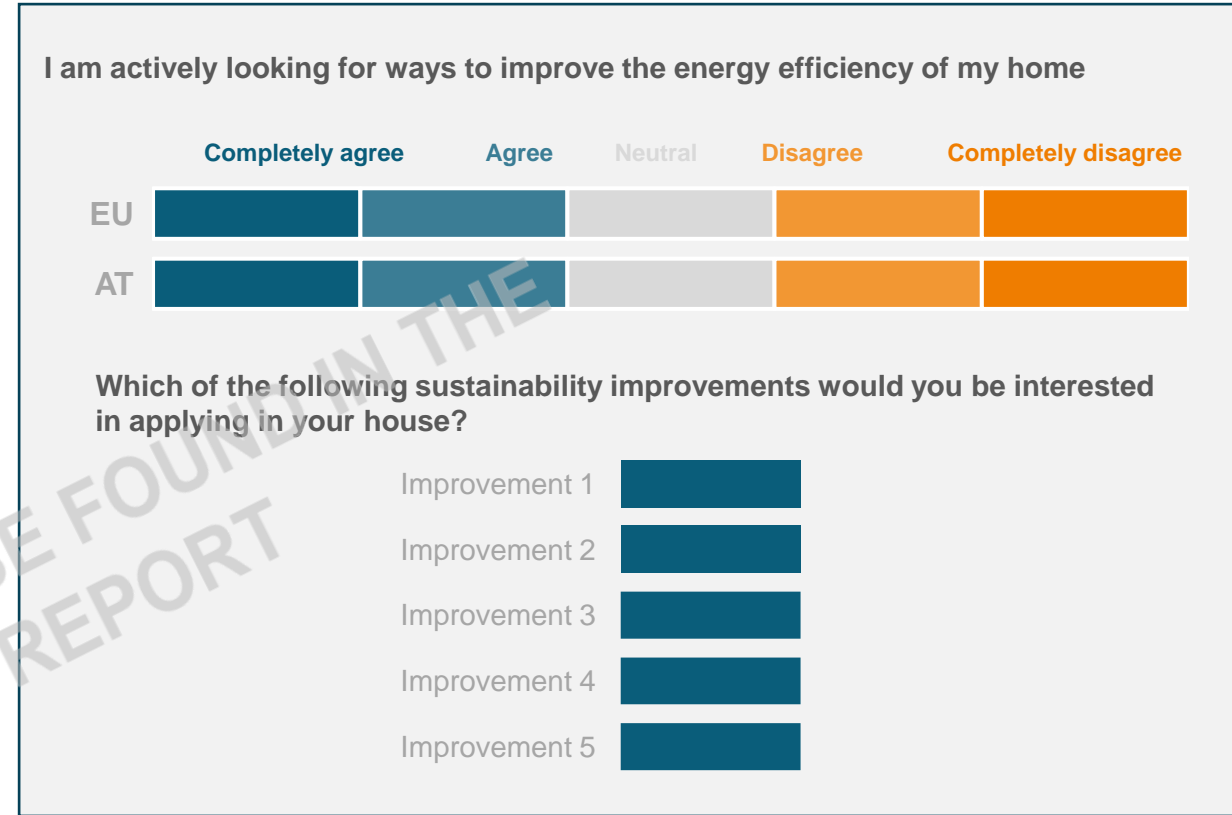
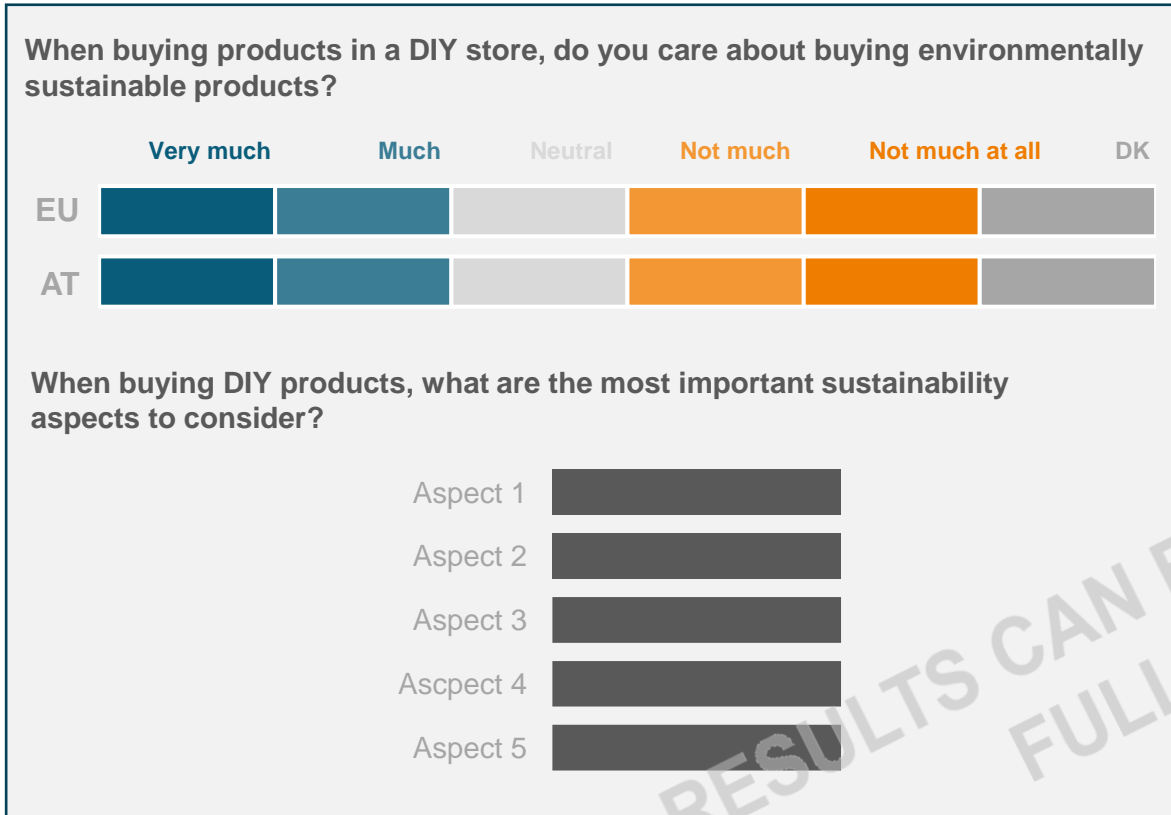


Base: n=600 per quarter

## Trend of getting product information online

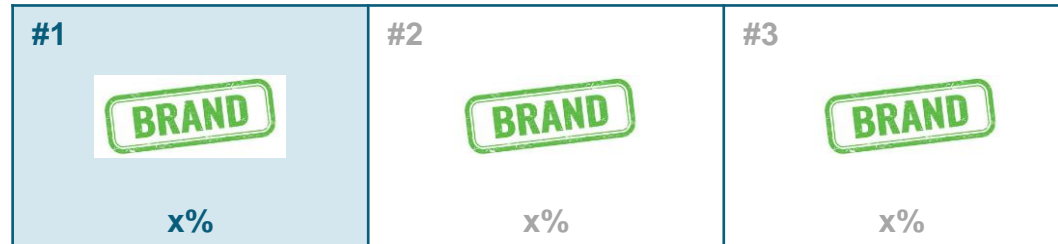


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RESULTS CAN BE FOUND IN THE FULL REPORT

**Which DIY store do you associate the most with sustainability?**



# USP Marketing Consultancy

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