



European Home Improvement Monitor Q3 2024

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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:

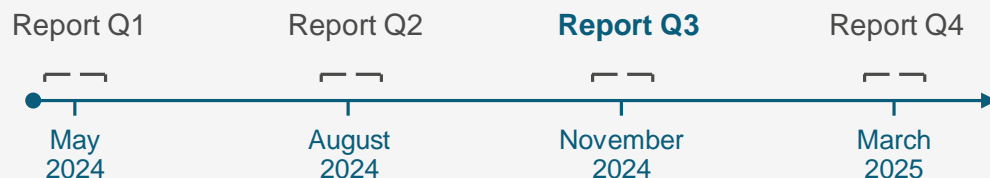
Q1: Needs & willingness to invest in sustainability

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

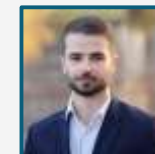


PROJECT TEAM



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WHY EUROPEAN HOME IMPROVEMENT MONITOR?



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.



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**.



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.

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 approx. 6,600 interviews

3rd chapter – Incidence rate (Share of households that did a home improvement job) is based on 600 per country per quarter; Theme questions on approx. 600 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+
47%	53%	Austria	24%	34%	43%
47%	53%	Belgium	20%	36%	43%
45%	55%	Denmark	24%	32%	45%
49%	51%	France	24%	36%	40%
48%	52%	Germany	25%	30%	45%
49%	51%	Italy	20%	40%	39%
48%	52%	Netherlands	25%	33%	43%
50%	50%	Poland	28%	43%	29%
49%	51%	Spain	23%	42%	35%
49%	51%	Sweden	28%	31%	41%
48%	53%	UK	27%	32%	41%

Weighting factor

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

Methodology

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)									

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.
- Looking forward to the months October – December, 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?
- To what degree do you expect to spend **more or less money** on home improvement in October – December 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? 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?

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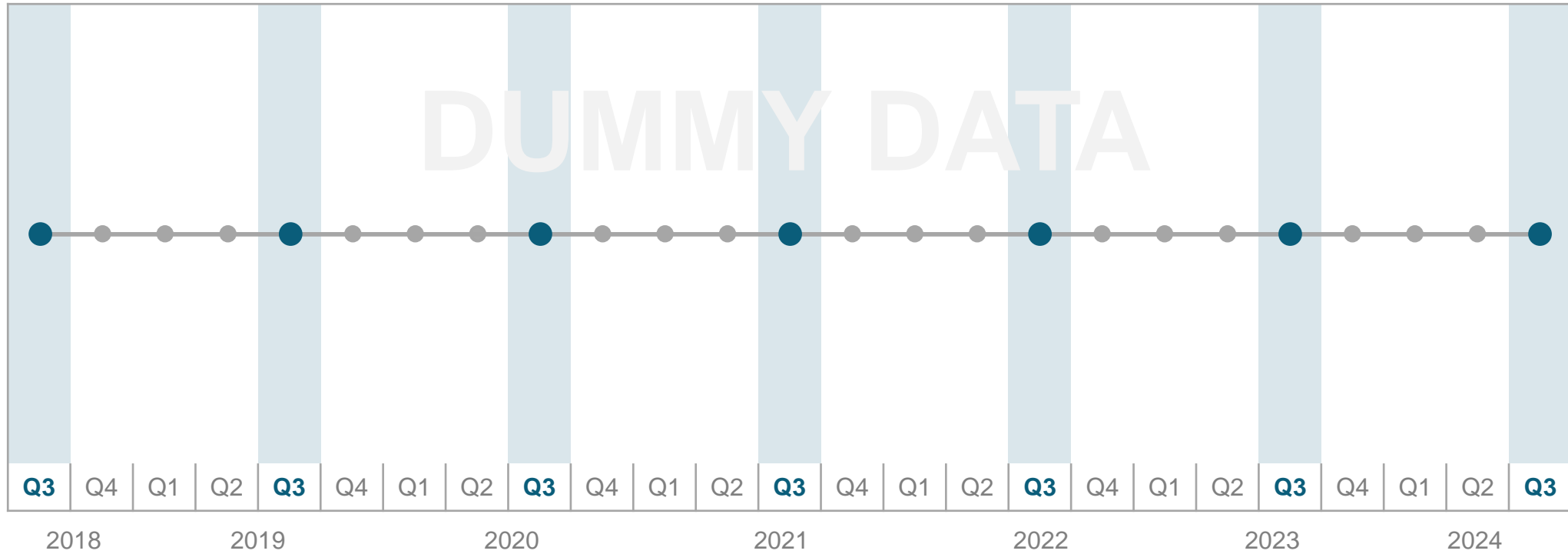
Country Overview

Home improvement per category



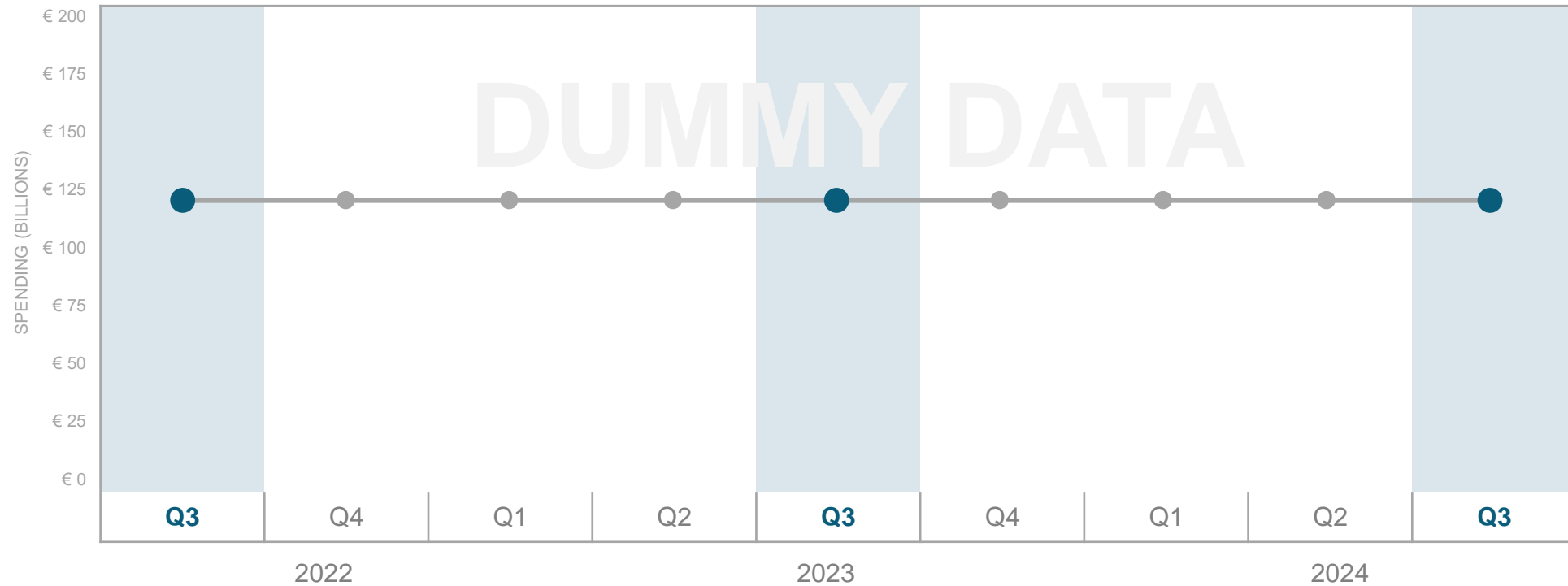
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Share of households that have done a home improvement job
2024 Q3



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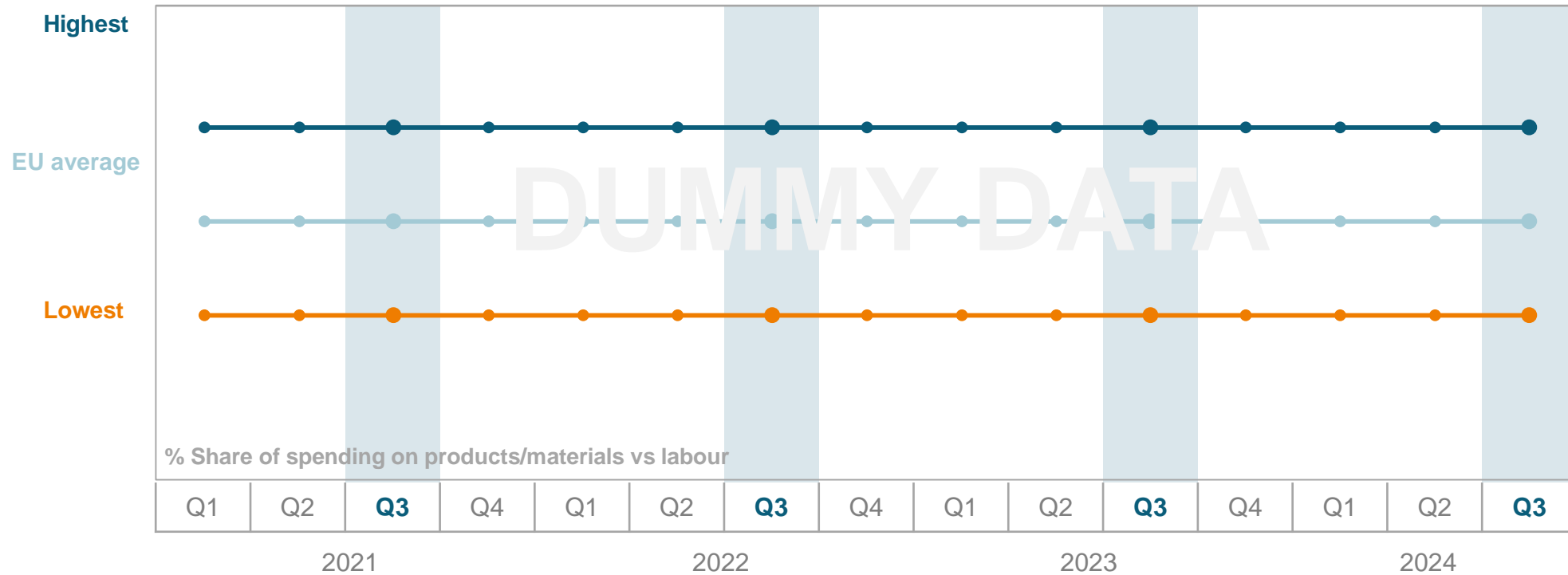
European spending on labour and material
2024 Q3



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

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European spending on labour and material
2024 Q3



AU	x%
BE	x%
DK	x%
FR	x%
DE	x%
IT	x%
Total	x%
NL	x%
PL	x%
ES	x%
SE	x%
UK	x%

Q3 2024

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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

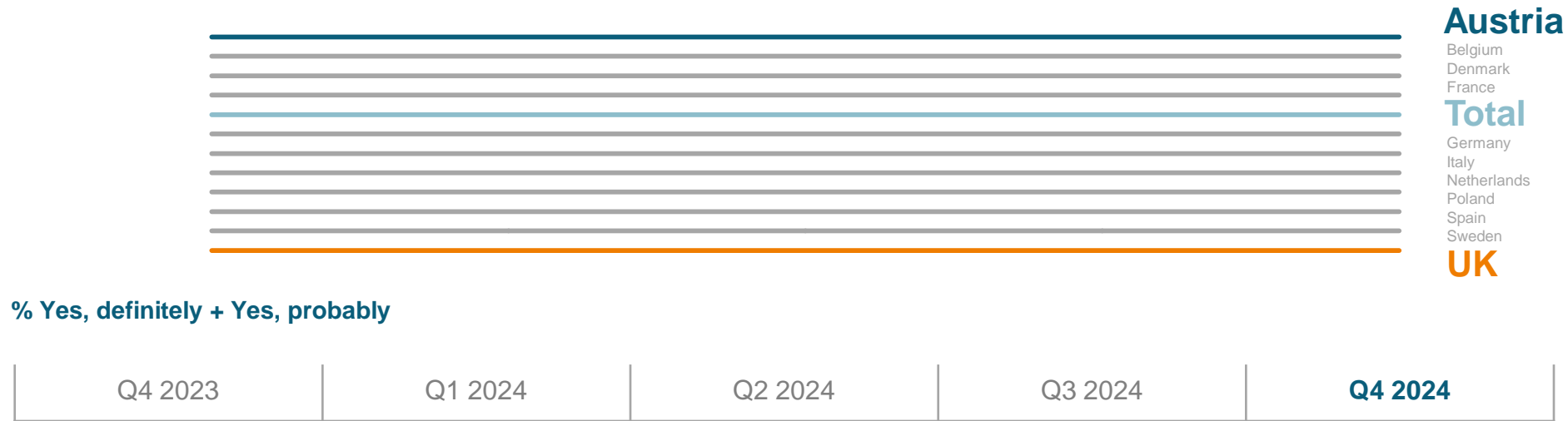


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Plans in the next 30 days – by country

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

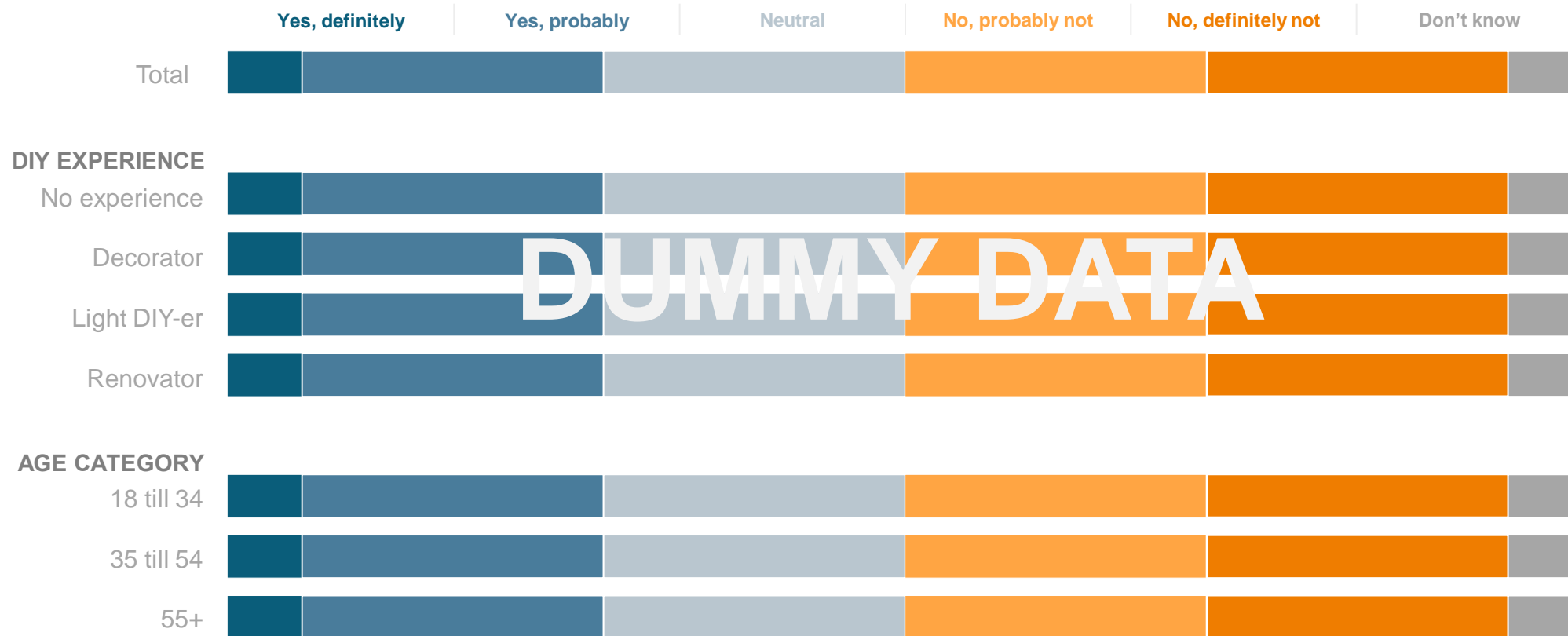
DUMMY DATA



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Plans in the next 30 days – by segment

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



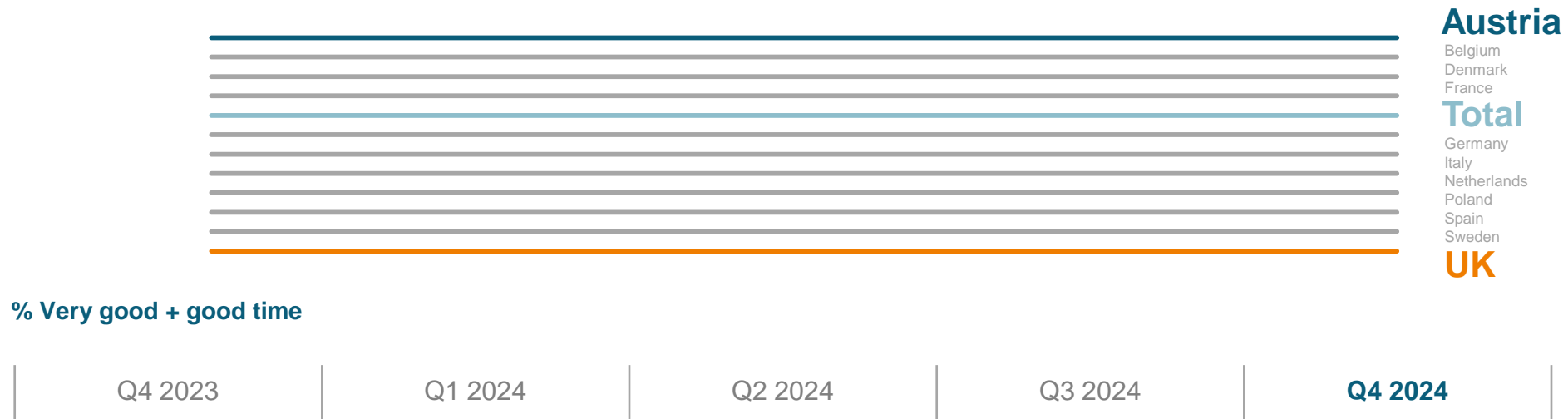
Base: N = 6,613
 Values below 5% are not labelled

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Hire a professional – by country

Do you feel this is a good or bad time to hire a professional for home improvement, repair or maintenance?

DUMMY DATA



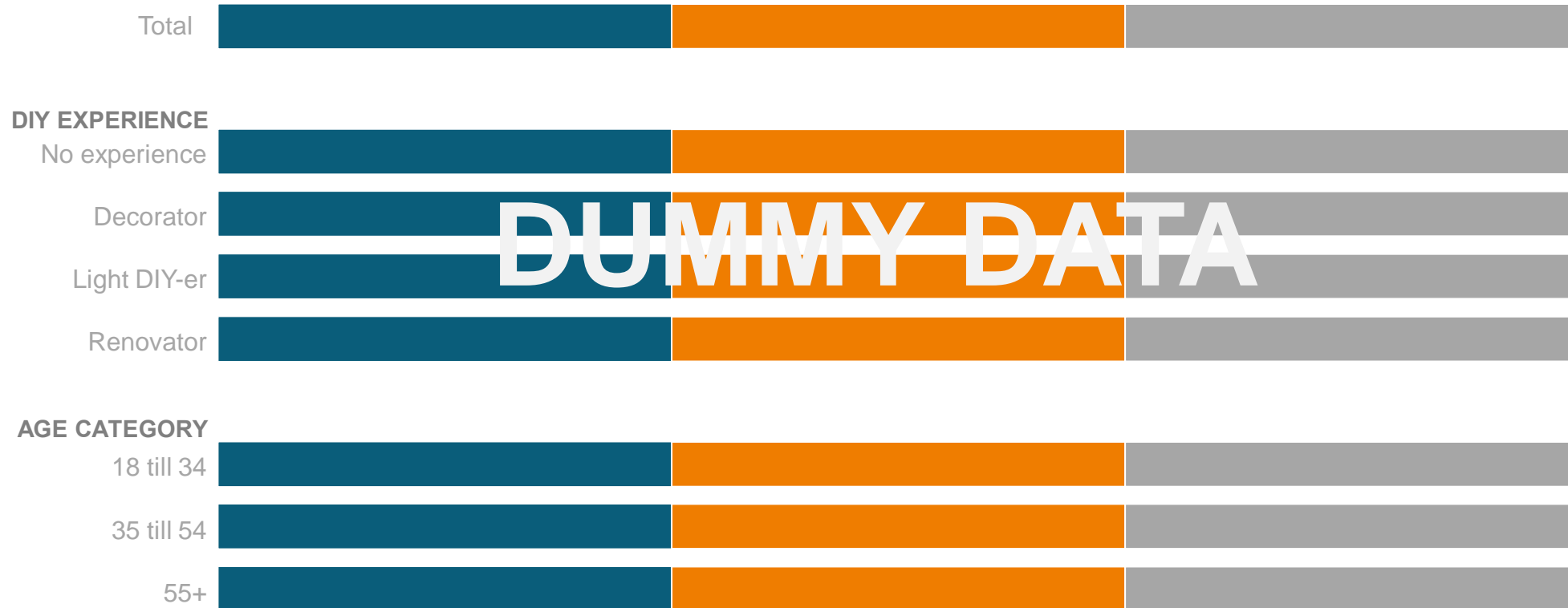
Base: N = 6,613

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Moving plans

Do you have plans to move within the next 12 months?

Yes | No | Don't know

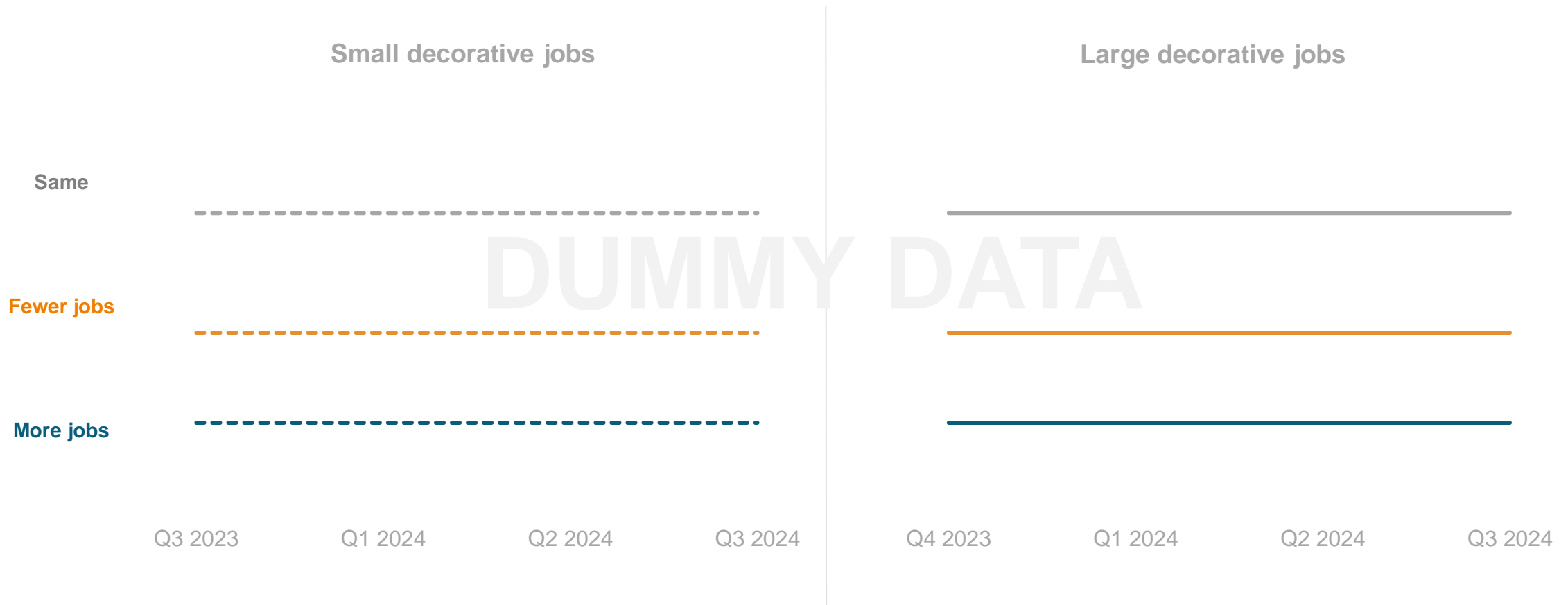


Base: N = 6,613

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Outlook on decorative jobs compared to the same period in 2023

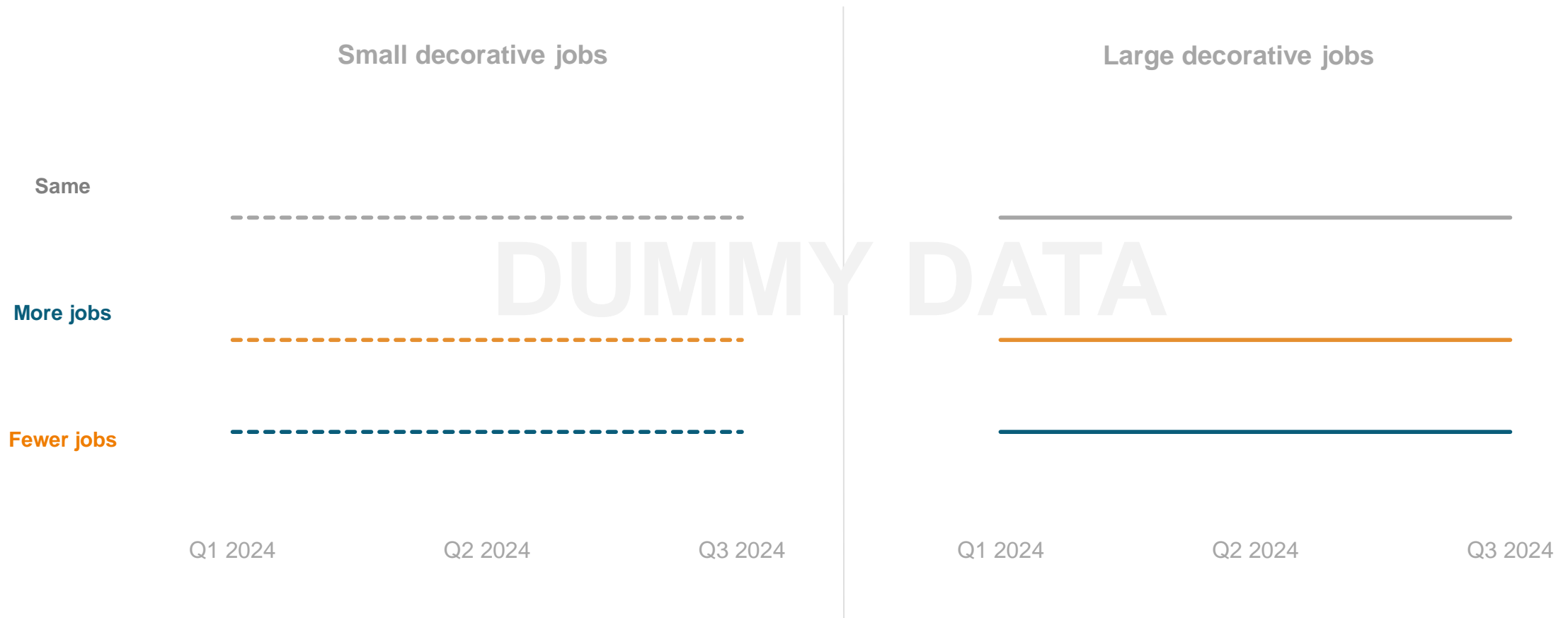
Looking forward to the months **October-December**, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than the same period last year?



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Outlook on decorative jobs compared to the same period in 2023

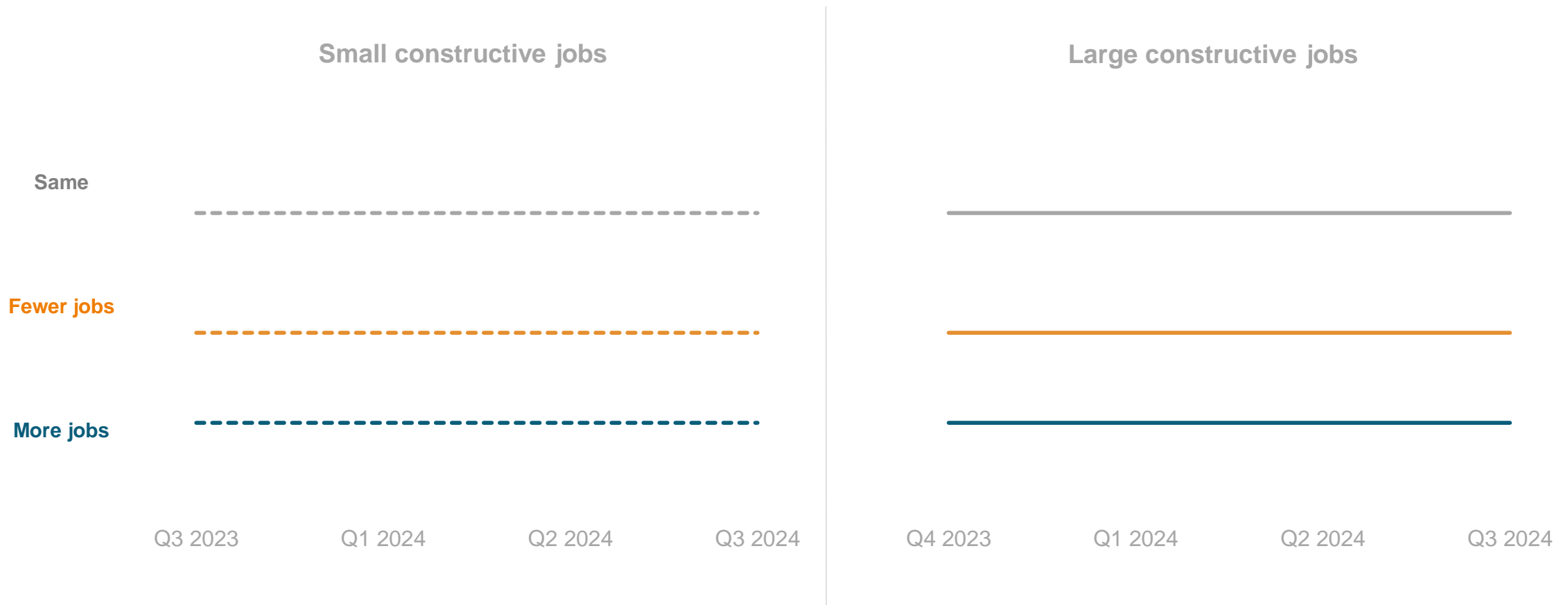
Looking forward **to the next 12 months**, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than the same period last year?



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Outlook on constructive jobs compared to the same period in 2023

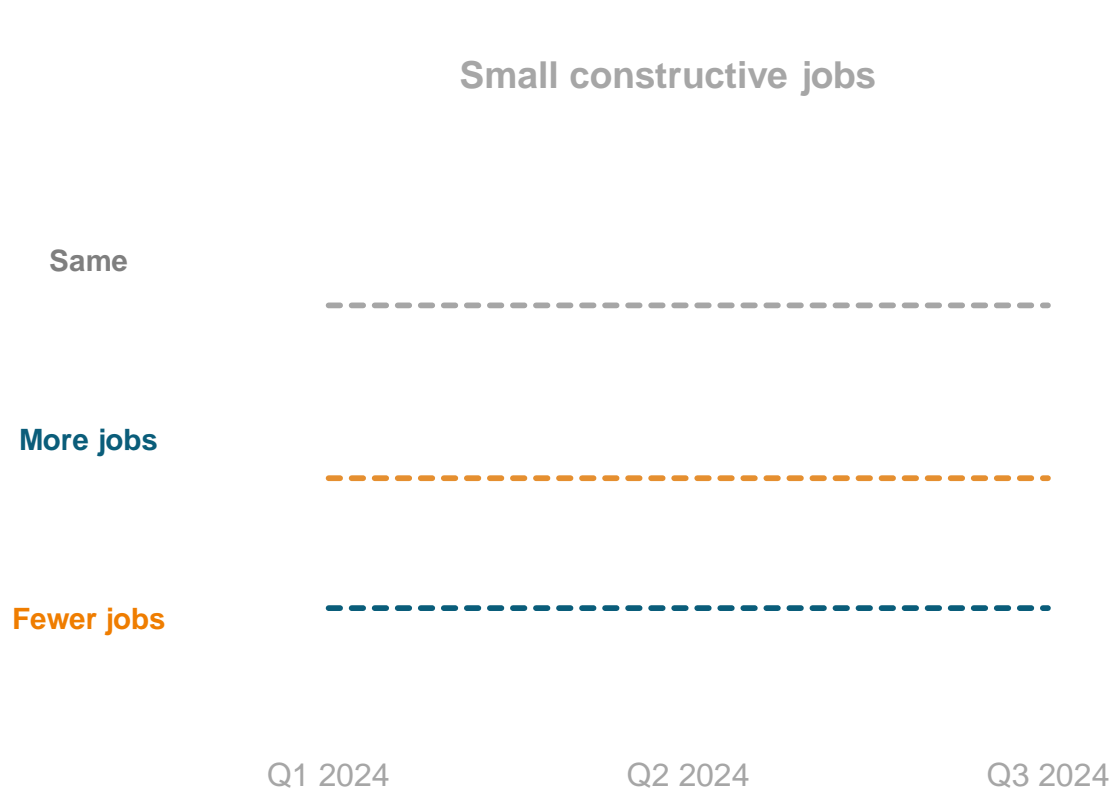
Looking forward **to the months October-December**, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than the same period last year?



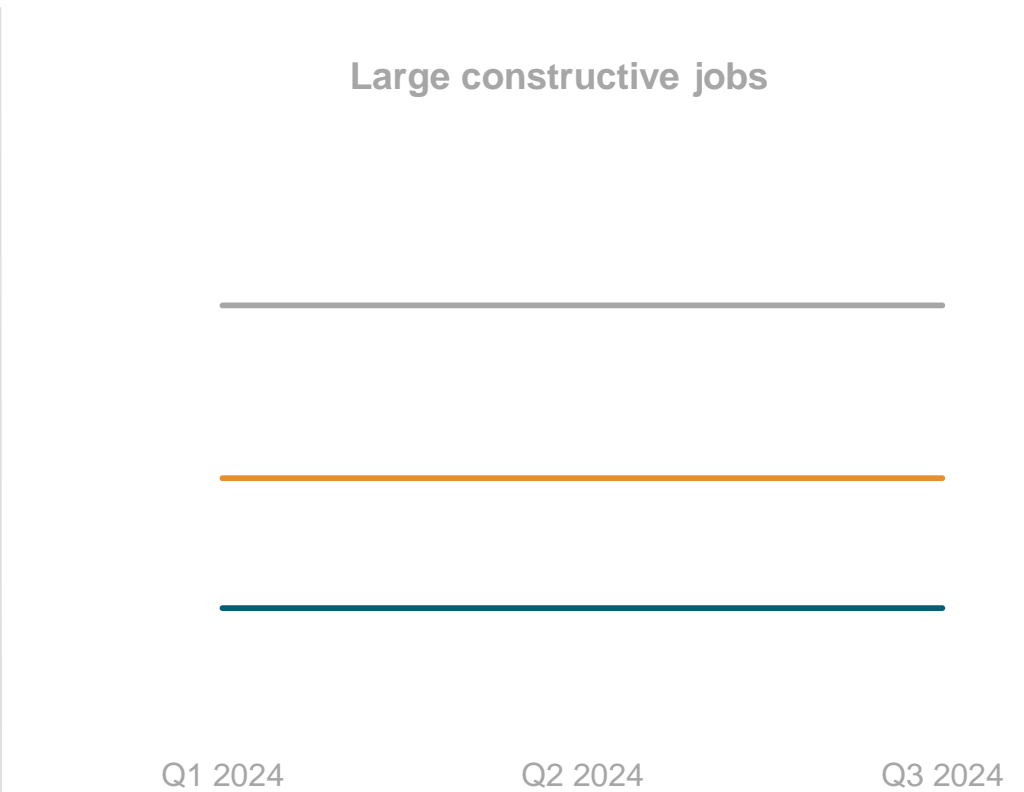
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Outlook on constructive jobs compared to the same period in 2023

Looking forward **to 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?



N = 3,300 per quarter
European Home Improvement Monitor Q3 2024

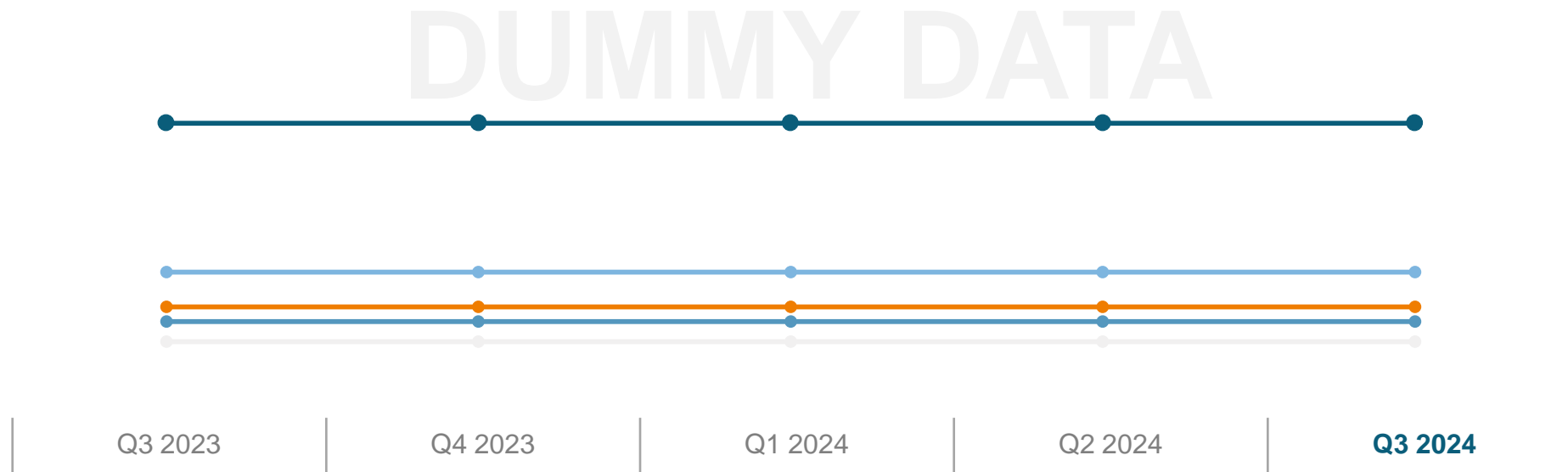


N = 3,300 per quarter

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Cancellation reasons

Why did you postpone or cancel your home improvement, repair or maintenance project?



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Spending on improvement jobs

To what degree do you expect to spend more or less money on home improvement in October - December compared to the same period last year?

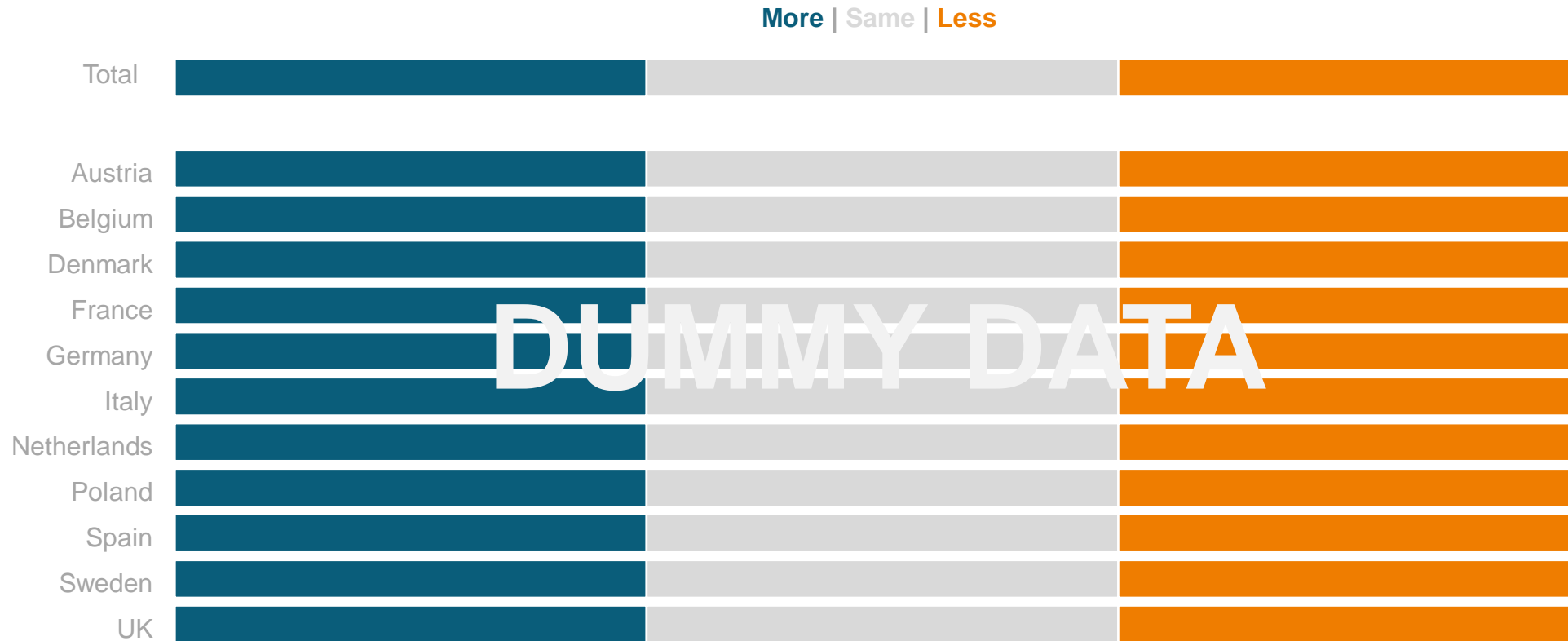
More | Same | Less



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Spending on improvement jobs

To what degree do you expect to spend more or less money on home improvement in the next 12 months compared to the same period last year?



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Start a project under €5.000

Do you feel this month is a good or bad time to start a project under €5.000 for home improvement, repair or maintenance?

(Very good + good time) – (Very bad + bad time)



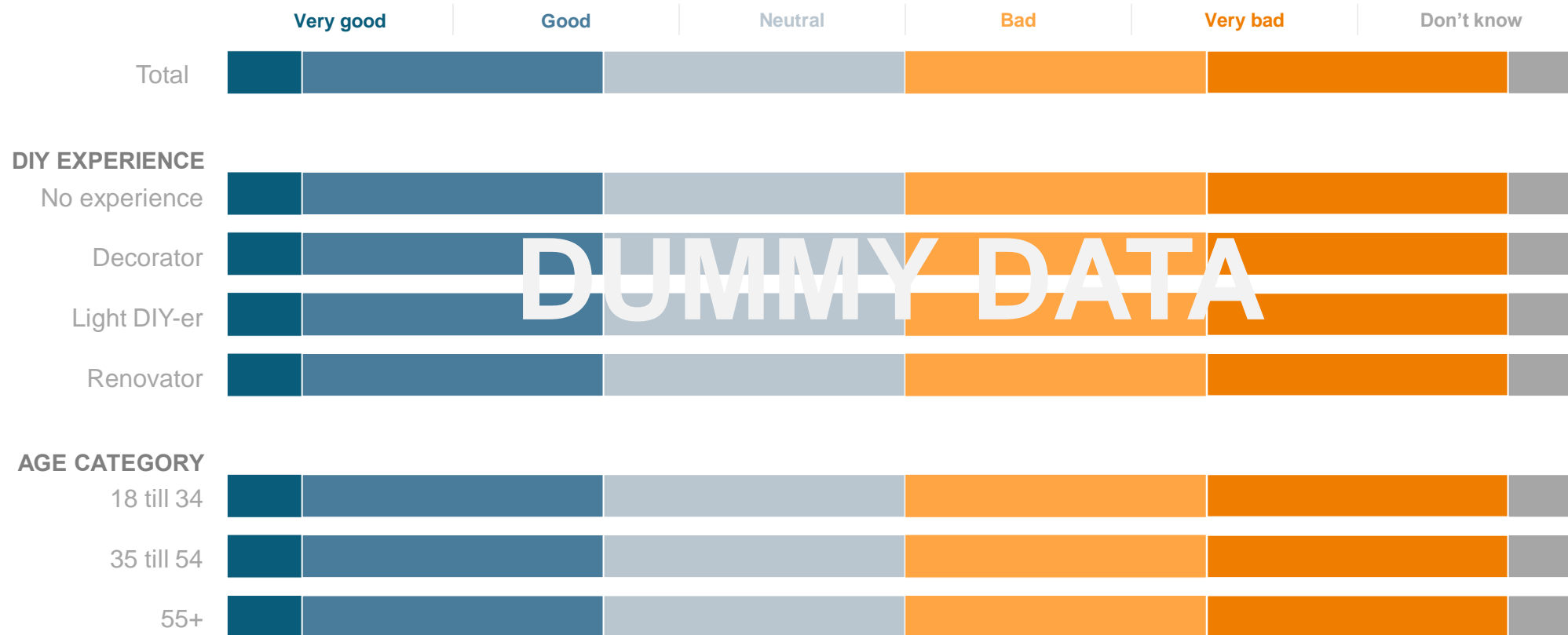
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DUMMY DATA

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Start a project under €5.000

Do you feel this month is a good or bad time to start a project under €5.000 for home improvement, repair or maintenance?



Base: N = 6,613
 Values below 5% are not labelled

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Start a project over €5.000

Do you feel this month is a good or bad time to start a project over €5.000 for home improvement, repair or maintenance?

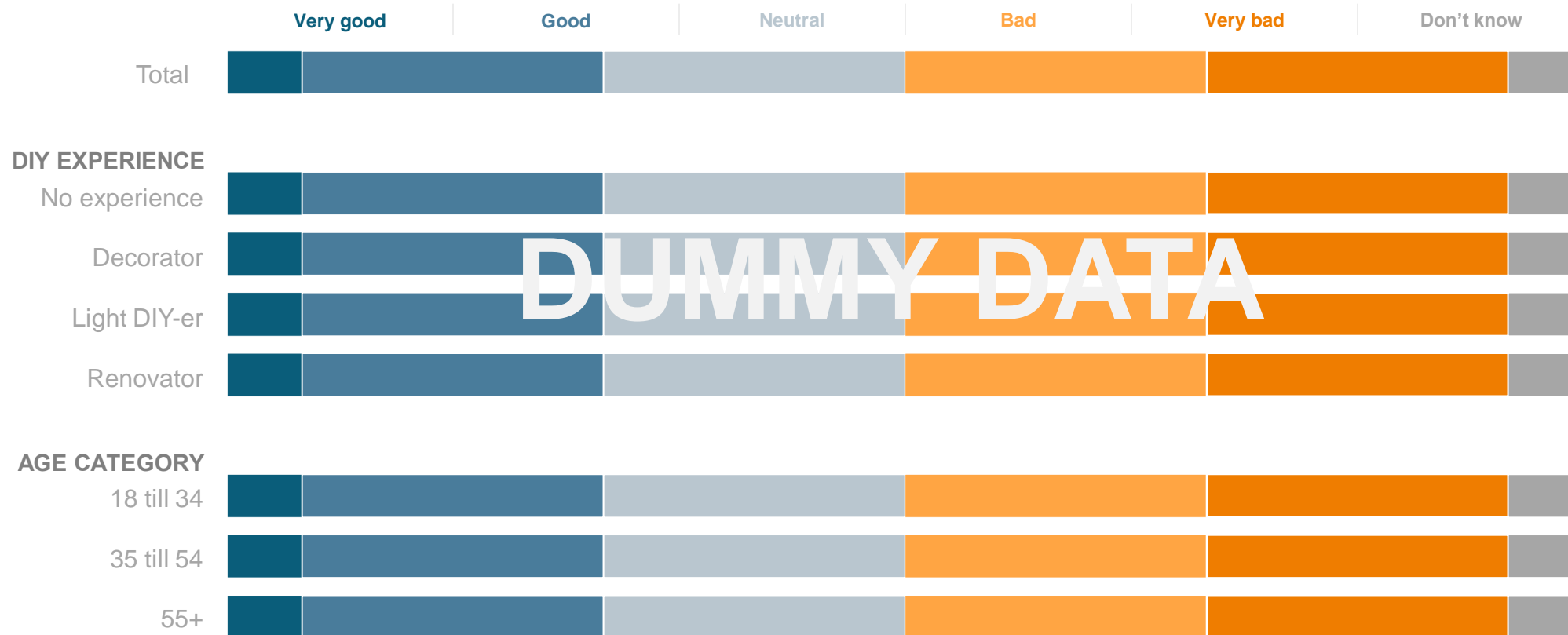
(Very good + good time) – (Very bad + bad time)



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Start a project over €5.000

Do you feel this month is a good or bad time to start a project over €5.000 for home improvement, repair or maintenance?



Base: N = 6,613
 Values below 5% are not labelled

Summary: Outlook for Home Improvement Product Spending

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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	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

Base per country:
N = 600

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Moment of brand selection

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

DUMMY DATA

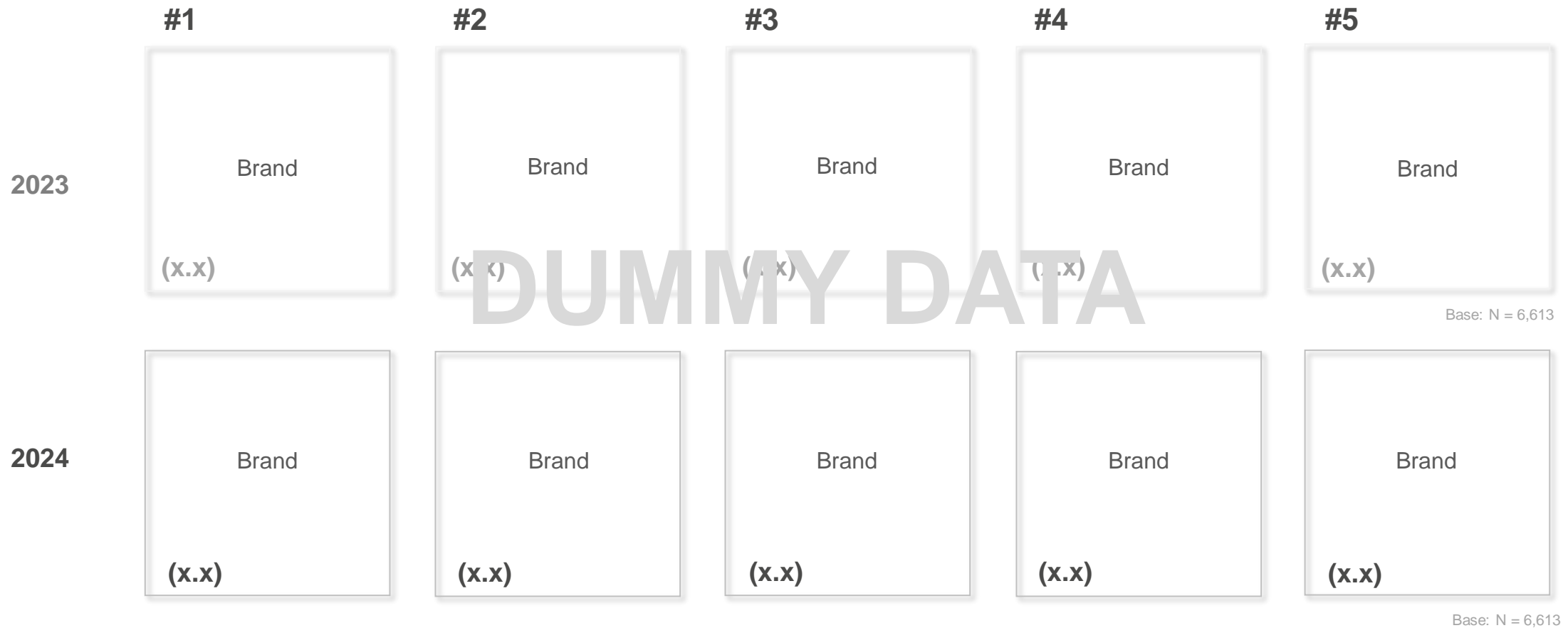


*2017-2023: approximately N = 26,400 per year; 2024 (Q1-Q3): N = 19,800

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Top-5 DIY stores with the highest general satisfaction score in Europe

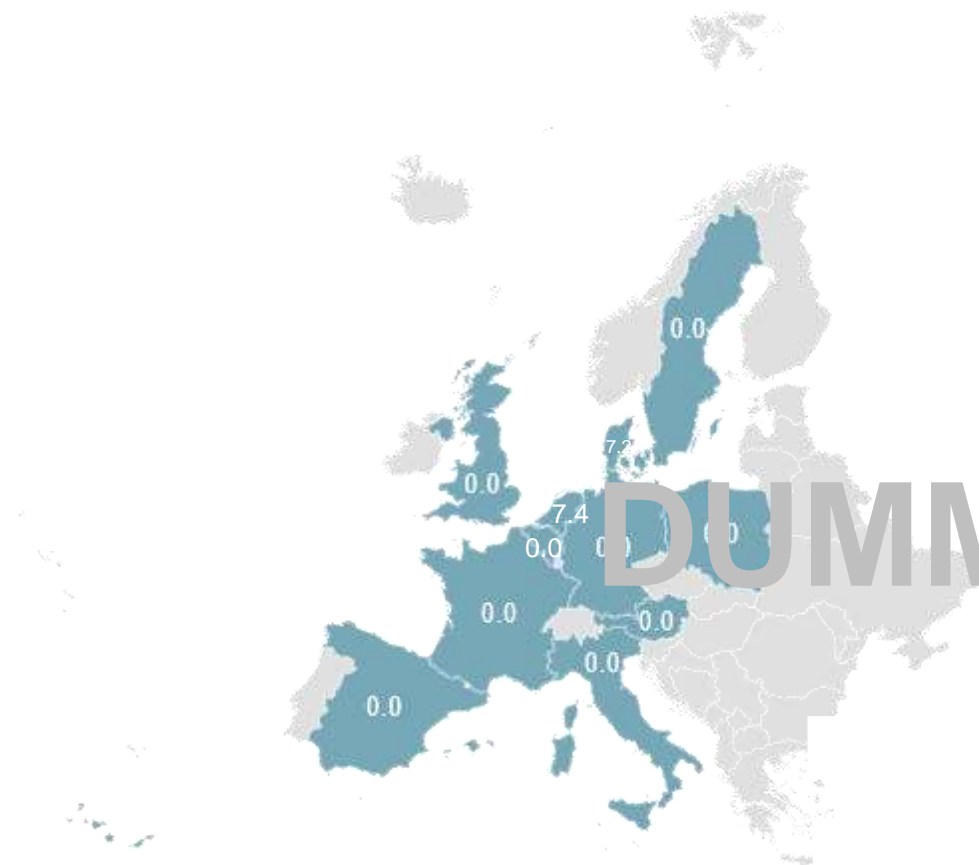
How would you rate [1-10] the following DIY stores on general satisfaction?



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General satisfaction with DIY stores in each country

How would you rate [1-10] the following DIY stores on general satisfaction?



Base: N = 6,613

Importance of 5 aspects for general satisfaction

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	IMPORTANCE [Influence on GS^]
#1 ASPECT	x%*
#2 ASPECT	x%*
#3 ASPECT	x%*
#4 ASPECT	x%*
#5 ASPECT	x%*

^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.

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

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Average satisfaction score per aspect

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

Top-5 DIY store in each aspect

	Average satisfaction score	#1	#2	#3	#4	#5
Quality of products	X.X	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x
Shopping experience	X.X	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x
Service and advise	X.X	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x
Attractive prices	X.X	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x
Sustainability	X.X	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x

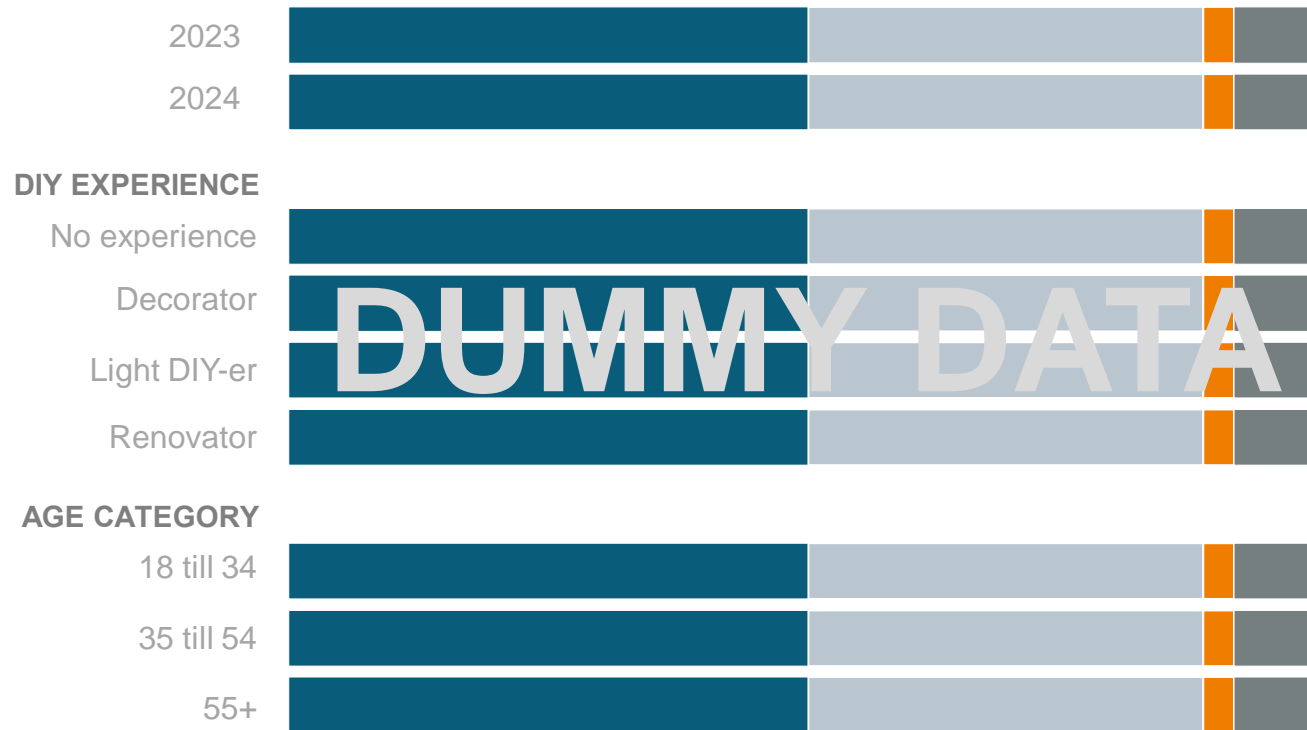
Base: N = 6,613

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Attitude towards private labels

What's your opinion on home brands (or own-brands) in DIY stores?

Positive | Neutral | Negative | Don't know



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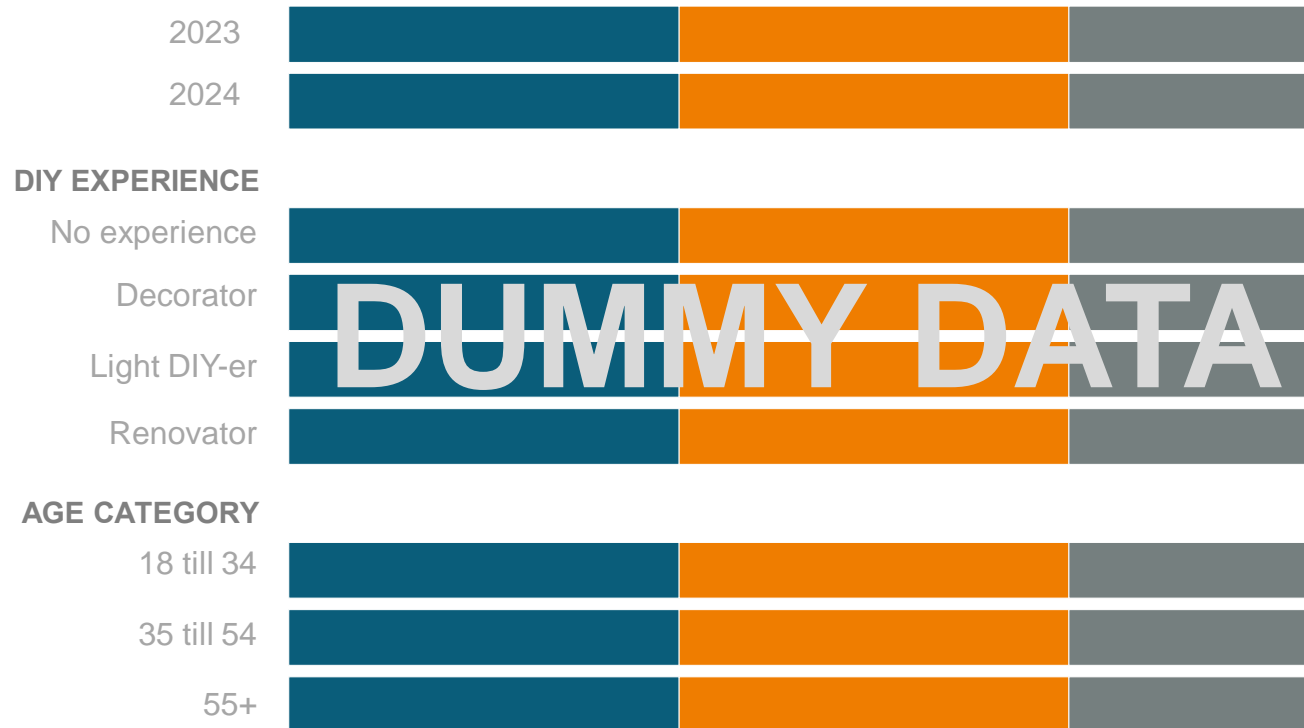
Base: N = 6,613
Values below 5% are not labelled

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Preference: A-brands (name brands) versus private labels

What's your opinion on home brands (or own-brands) in DIY stores? In which product categories (14 different were measured) would you prefer an A-brand over a home brand?*

A brand | Home brand | Don't know



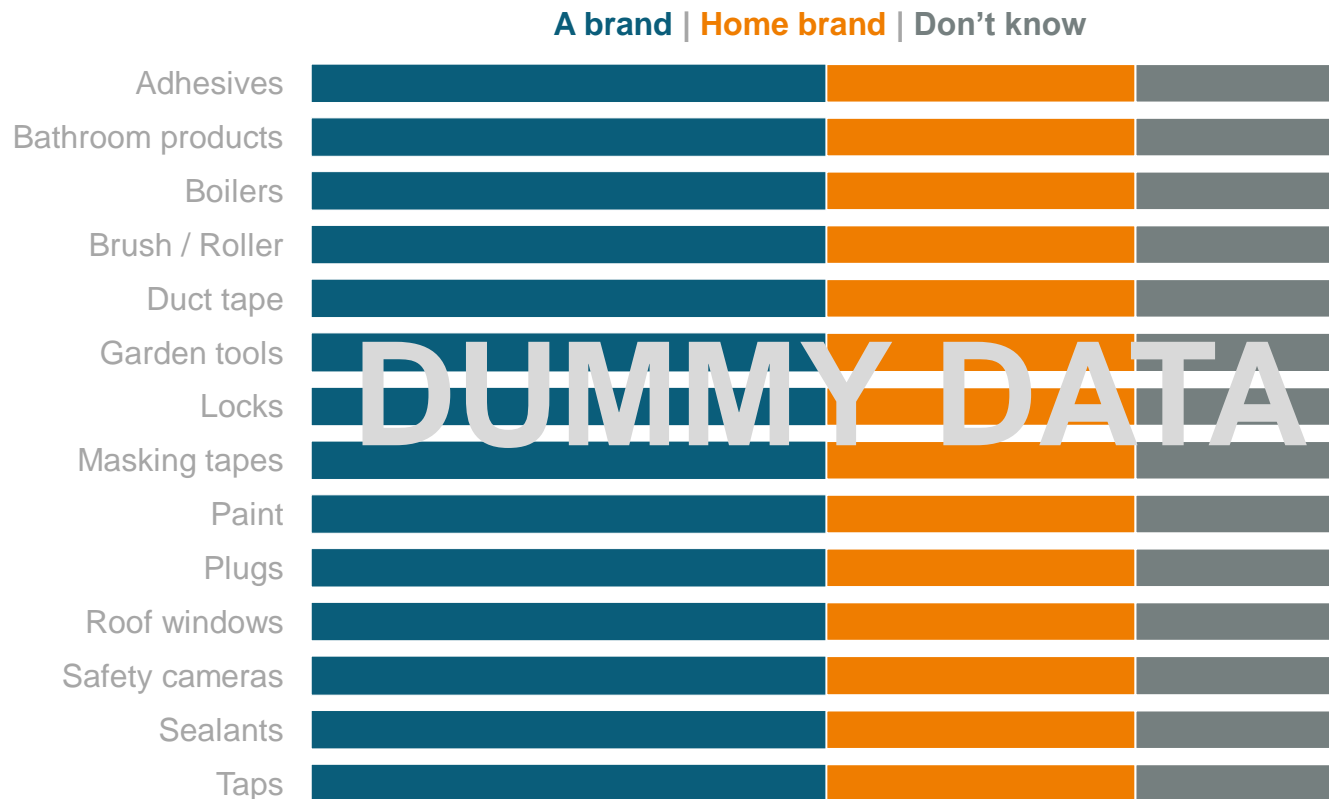
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*For this graph, all 14 products were summed up and presented on the overall level.

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Preference: A-brands versus private labels

In which product categories would you prefer an A-brand over a home brand?



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Branded versus unbranded

Branded home improvement products are more expensive so I prefer to buy non branded products online

Completely agree | Agree | Neutral | Disagree | Completely disagree | Don't know



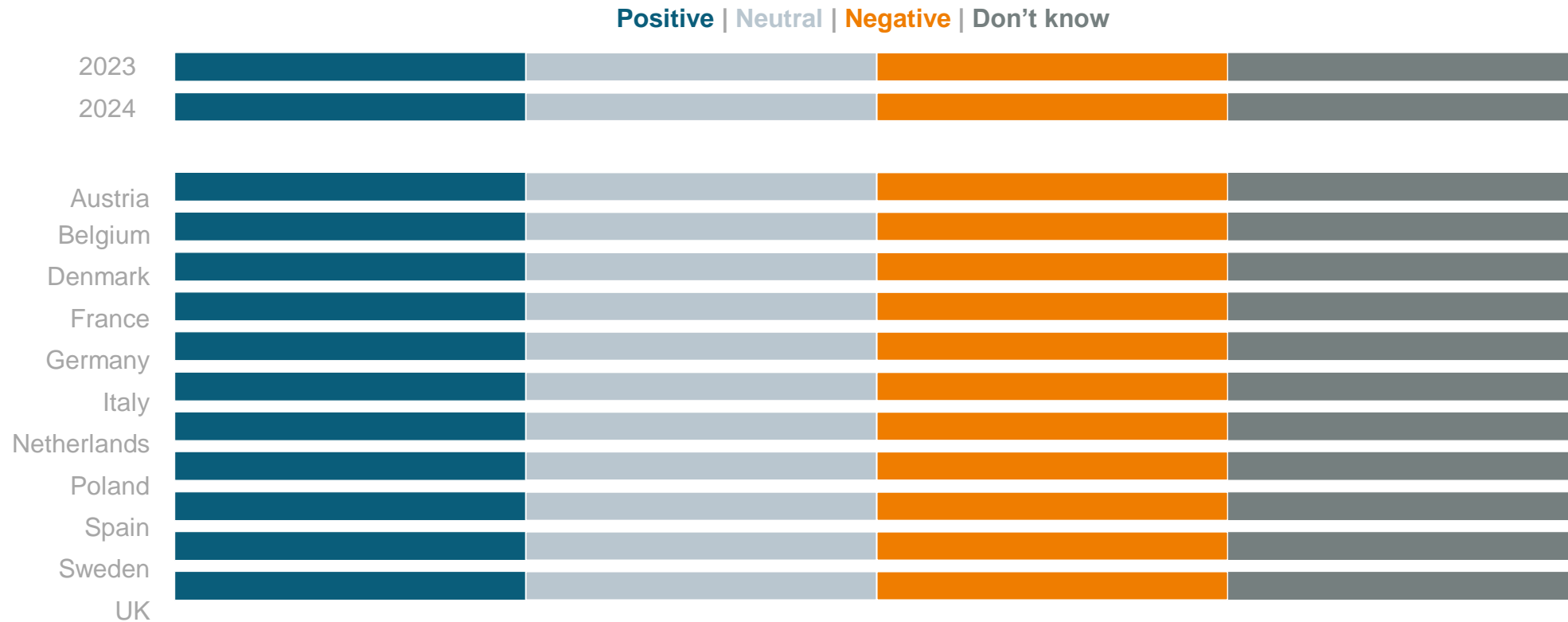
DUMMY DATA

Base: N = 6,613
 Values below 5% are not labelled

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Private labels and home brands

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?



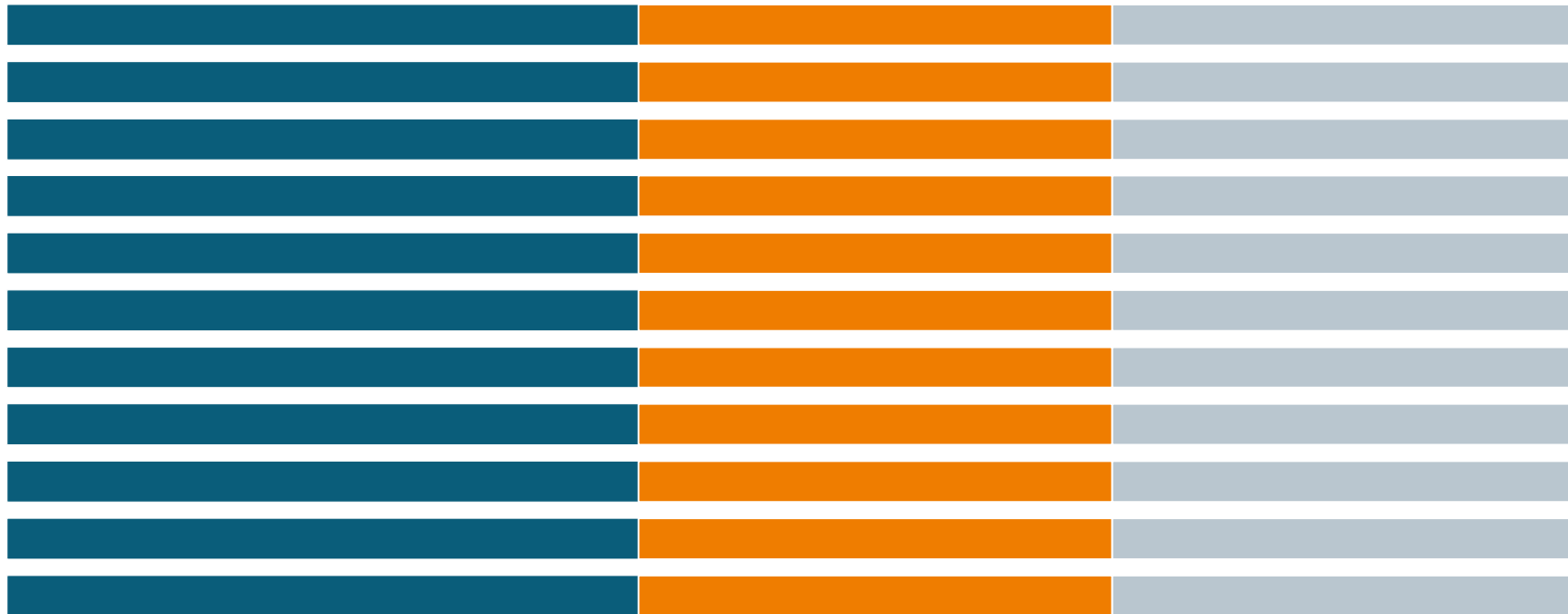
Base: N = 6,613
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Private labels and home brands preference

In which of the following categories would you prefer an A-brand over a home brand?

A brand | Home brand



Average of all product categories: locks, boilers, paint, safety cameras, roof windows, bathroom products, sealants, taps, adhesives, plugs, garden tools, duct tapes, brushes/rollers and masking tapes.

Summary: Branding

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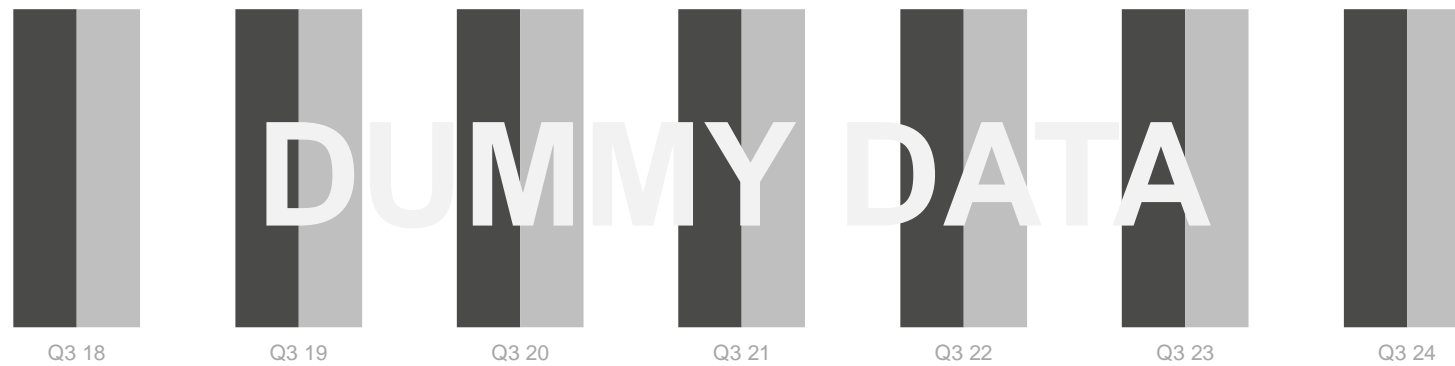
Home improvement per category



AUSTRIA

Share of households that did a home improvement job

AUSTRIA
EU AVERAGE



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

AUSTRIA

The shopping experience and quality of products are the strongest predictors of general satisfaction in Austria.

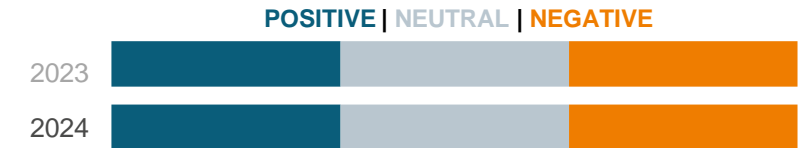
Satisfaction score on various aspects of DIY stores

Bauhaus Hornbach Lagerhaus OBI



DUMMY DATA

Attitude towards private labels



Preference:

A-brands versus private labels



^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.

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