



European Home Improvement Monitor Q1 2024

Theme: Consumer needs & willingness to invest in sustainability

April 2024

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 6600 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:

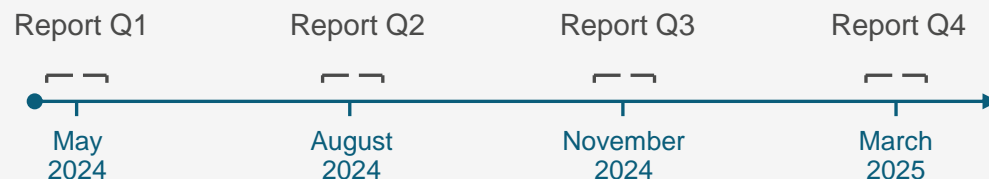
Q1: Sustainability - Needs & willingness to invest in sustainability

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

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

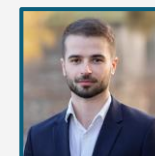


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WHY EUROPEAN HOME IMPROVEMENT MONITOR?



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.

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Economic Developments

In this chapter, we explore quarterly spending trends on home improvement products, the broader economic outlook and consumers' home improvement plans:



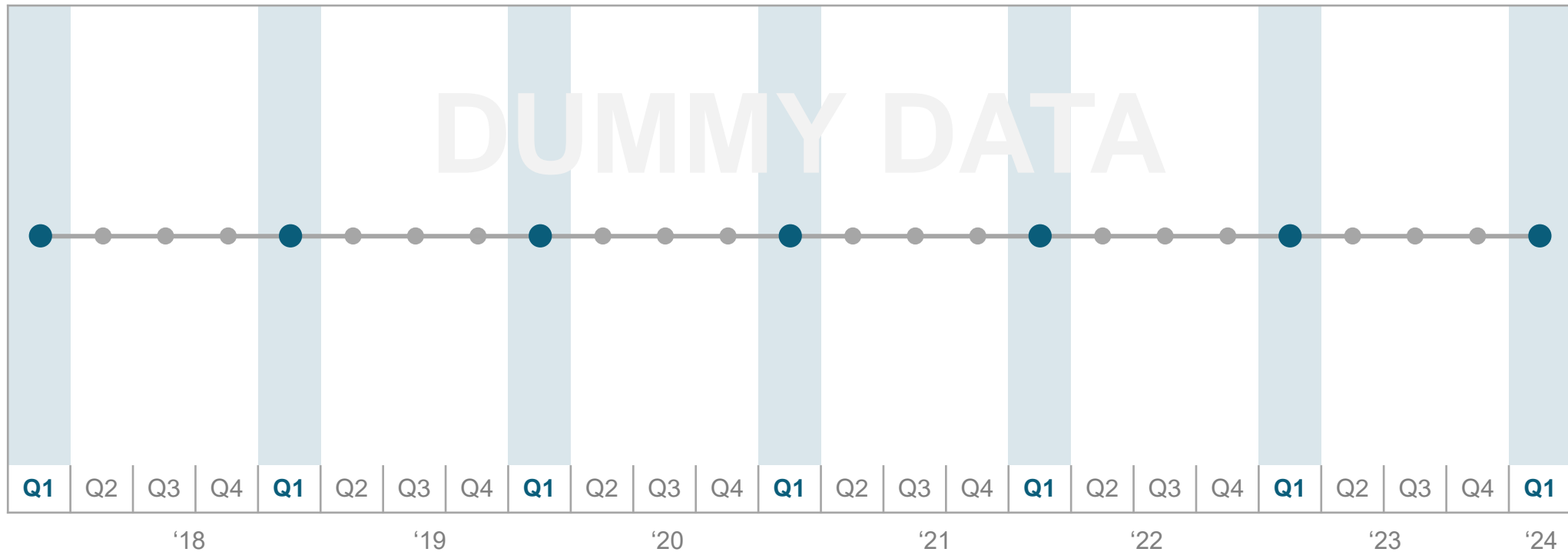
- Share of households that have done a home improvement job
- European spending on labour and material
- European spending on products/material and labour

Respondents were asked:

- To what degree do you expect to **spend more or less money** on home improvement in **April – June/in the next 12 months** 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?
- Are you **planning to start** a home improvement, repair or maintenance project **in the next 30 days**?
- 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?
- Do you have plans to **move** within **the next 12 months**?
- Looking forward to the months **April – June/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?
- Why did you **postpone or cancel** your home improvement, repair or maintenance project?

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Share of households that have done a home improvement job
2024 Q1

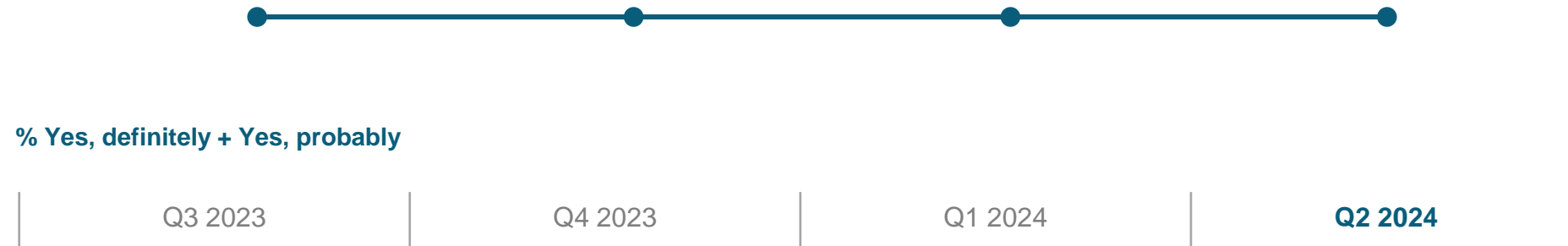


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Plans in the next 30 days

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

DUMMY DATA



Theme questions – Orientation & Sustainability

In this chapter, we take a deeper dive in the orientation on home improvement products. We measure online orientation through the following questions aimed at understanding the influence of online information on purchasing decisions. The respondents were asked the following:



- Did you get **information** about the **product online**?
- Did you make your **brand selection in the shop**, or did you already make your **brand selection before going to the shop**?

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



- To what extent are you interested in **improving the energy efficiency** of your home?
- Which of the following **sustainability improvements** would you be interested in applying in your house?
- What are **the main drivers/barriers** for more sustainability improvements to your home?
- When buying products in a DIY store, do you **care** about buying **environmentally sustainable** products? What are the **most important sustainability aspects** to consider?
- How important are **sustainability aspects** when purchasing the following products?
- Which **DIY store/home improvement product manufacturer** do you associate the most with sustainability?
- To what degree is it **important** for you that a **DIY store/DIY product brand** is involved in **sustainability initiatives**?
- What type of heat pump do you own and plan to purchase? What type of other adjustments did you/do you expect to have related to the installation of the heat pump in your house?

Country Overview

In this chapter, we examine orientation & sustainability trends on a country level:

- Share of households that did a home improvement job
- Trend of getting product information online
- Sustainability trends in consumer needs and willingness to invest in sustainability

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Online orientation

Did you get information about the product online?

DUMMY DATA



% online orientation

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

2018

2019

2020

2021

2022

2023

*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

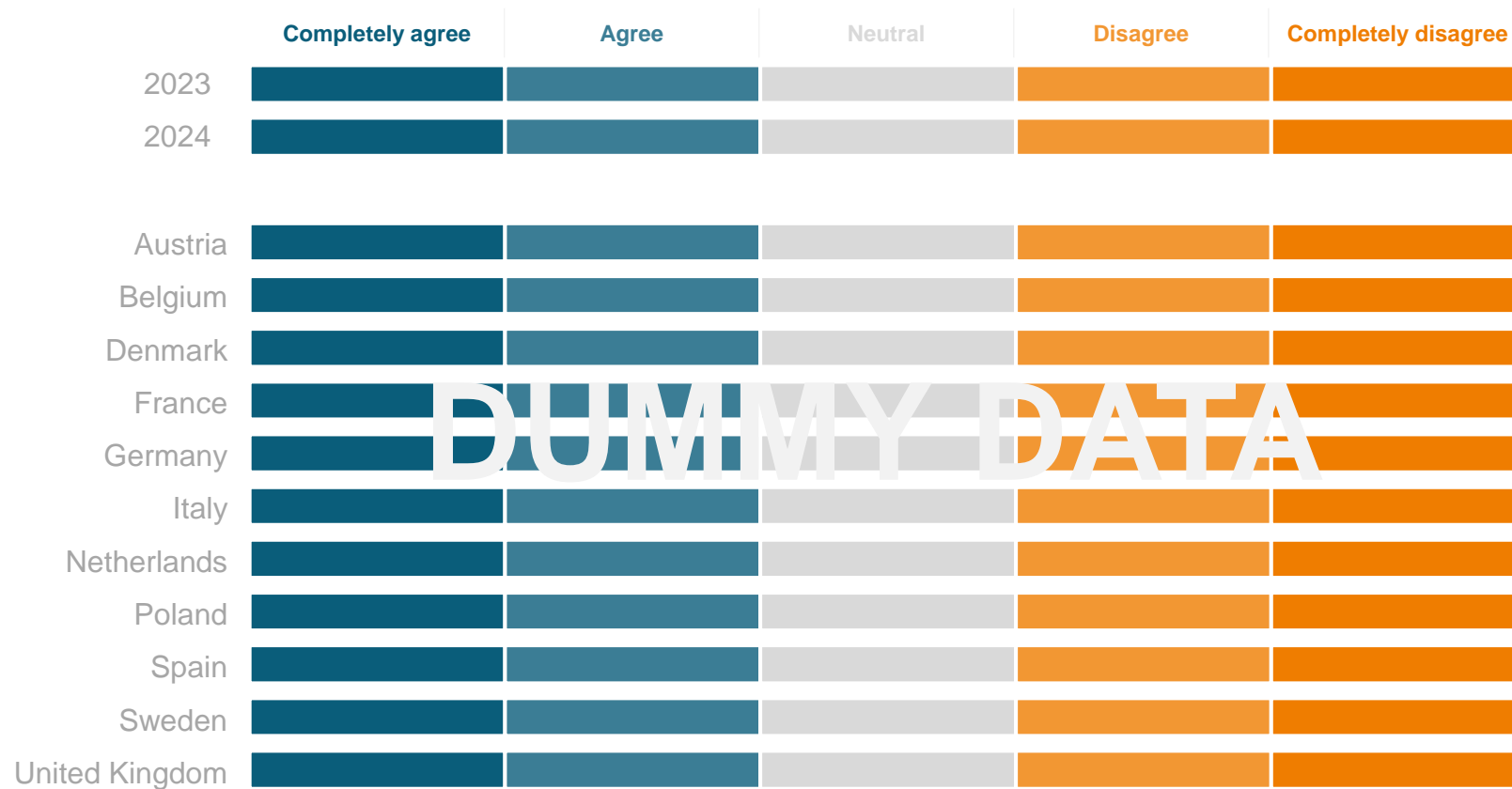
tapes
taps & mixers
tile adhesive
toilet
wallpaper

washbasin
whirlpool
window decoration

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Energy efficiency

My home is already very energy efficient



Base: N=6,669
 Values below 5% are not labelled

GERMANY

Share of households that did a home improvement job

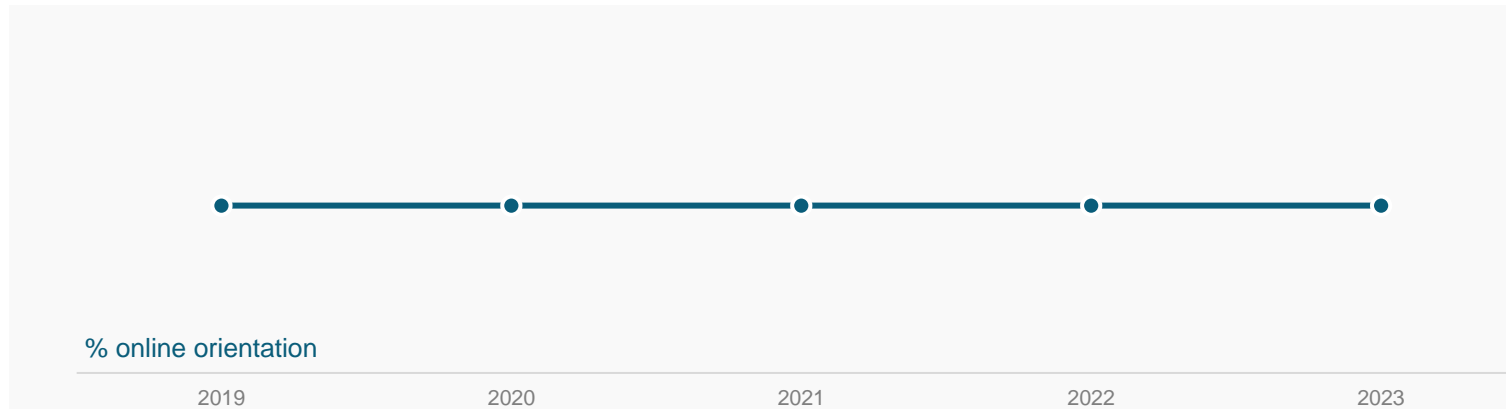
GERMANY
EU AVERAGE



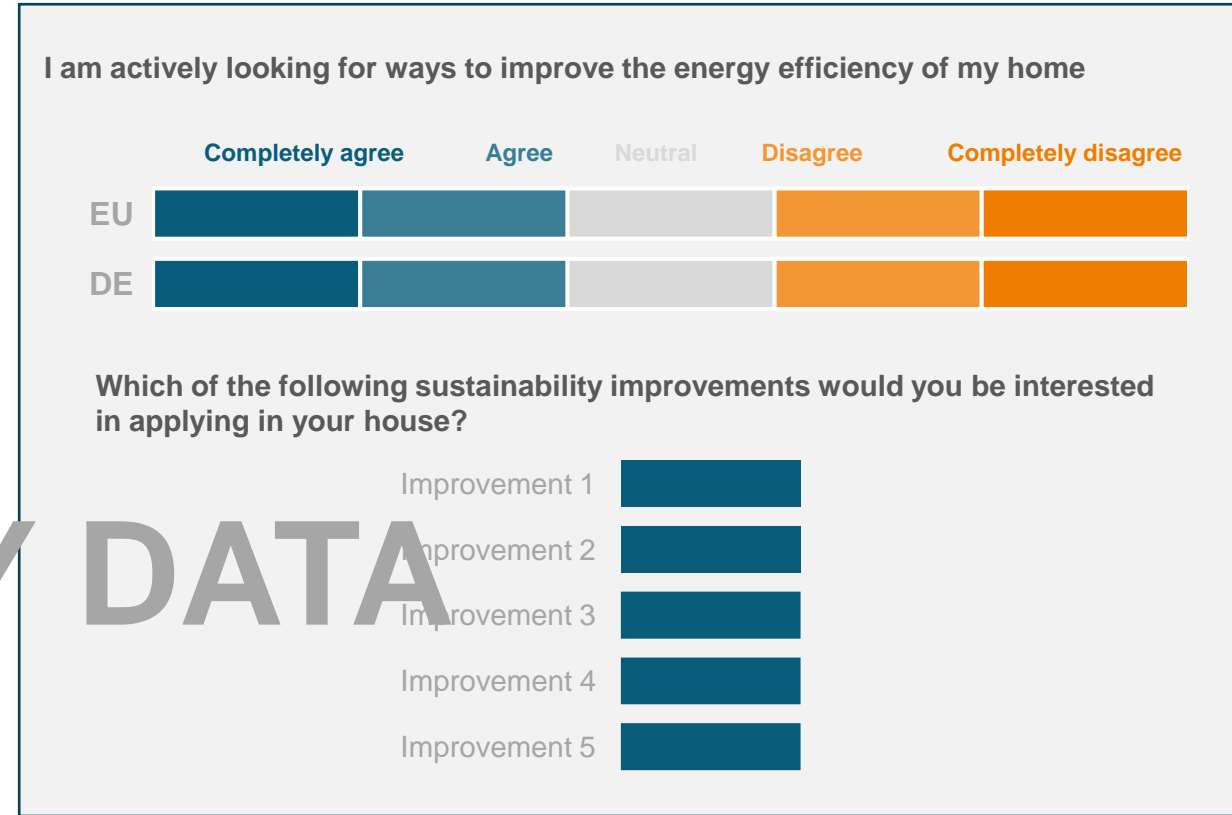
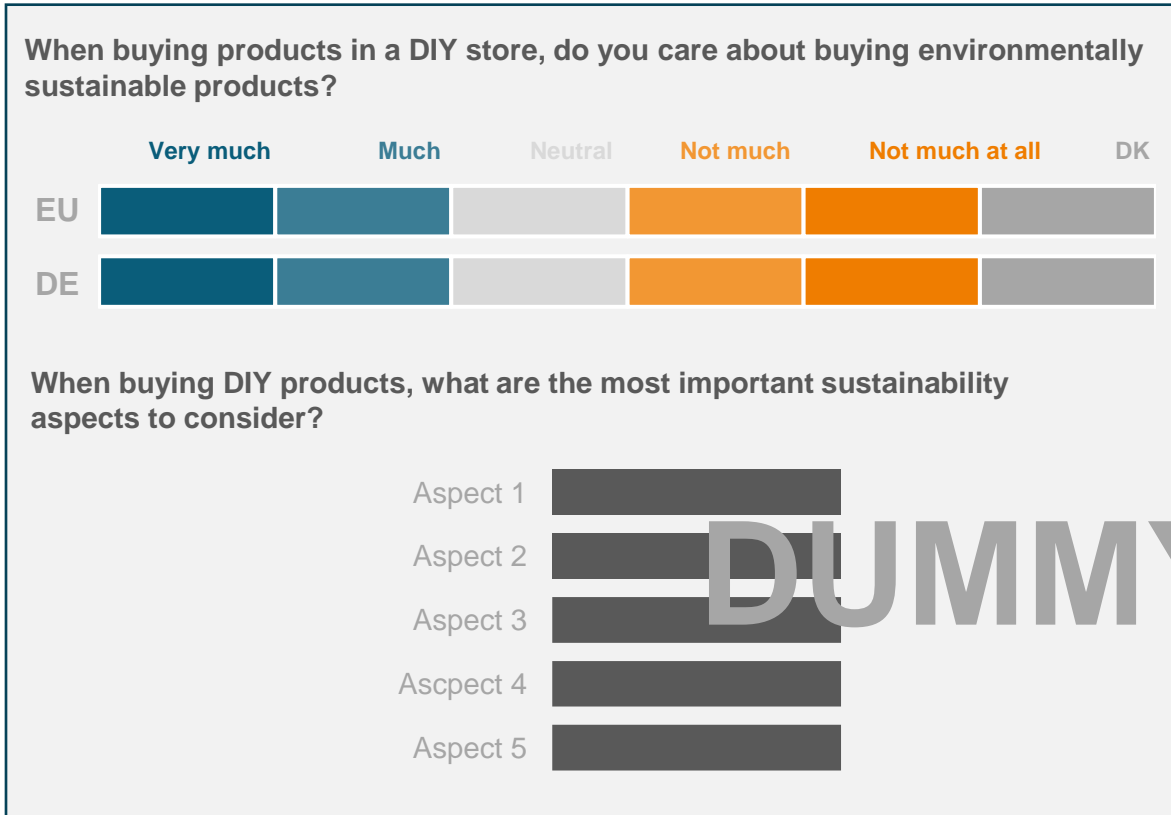
Base: n=600 per quarter

DUMMY DATA

Trend of getting product information online



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DUMMY DATA

Which DIY store do you associate the most with sustainability?



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Product Categories

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)									

Home Improvement per Category

In this chapter, we dive into questions about specific product categories, as mentioned in the previous slide:



- Share of households that have done a **home improvement job per product category** on a **quarterly level**
- **DIY share vs. DIFM share** per product category
- Who **determined the brand** of the product – you or the professional?
- What **brand** of <product category> did you buy?
- Further product specific questions

USP Marketing Consultancy

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