



European Home Improvement Monitor Q4 2024

Do-It-Yourself or Do-It-For-Me

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:

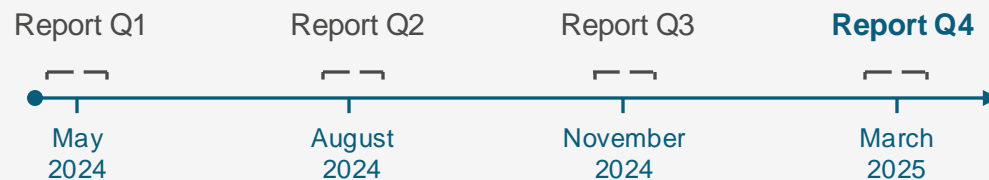
Q1: Needs & willingness to invest in sustainability

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

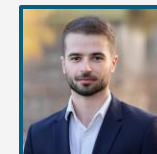


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WHY EUROPEAN HOME IMPROVEMENT MONITOR?



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.

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DIY vs. DIFM

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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

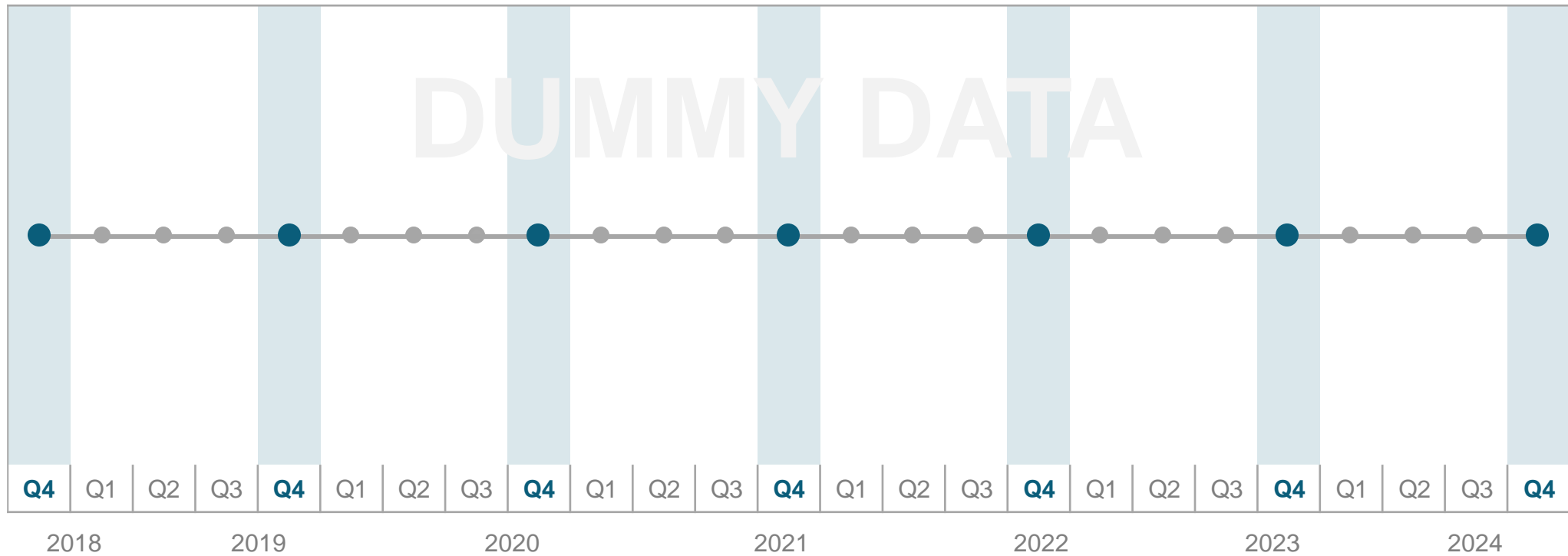
Respondents were asked:

- To what degree do you expect to **spend more or less money** on home improvement in **January – March/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 **January – March/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 Q4



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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



% Yes, definitely + Yes, probably



Theme questions

In this chapter, we take a deeper dive in the purchasing on home improvement products. The respondents were asked the following:



DIY vs. DIFM:

- Have you **outsourced** any home improvement projects in the past two years?
- Could you **divide 100% of the total amount of work** that you outsourced in the past two years between the mentioned companies/persons?
- **Who was involved** in (performed) the work activities?
- What were your **main reasons** for hiring a professional? How do you **select a professional** for a project? How **satisfied** were you with aspects of the service?
- What is your **most important barrier** to doing home improvement jobs **yourself**?
- Do you feel this is a **good or bad time to hire a professional** for home improvement, repair or maintenance?
- Which home renovations are you **planning to do in 2025**? How far are you with planning this renovation?
- For which renovations do you **expect to hire** a professional? How do you **prefer to hire** a professional?
- If you hire a professional via a platform or store, how would you prefer the **costs to be charged**?

Country Overview

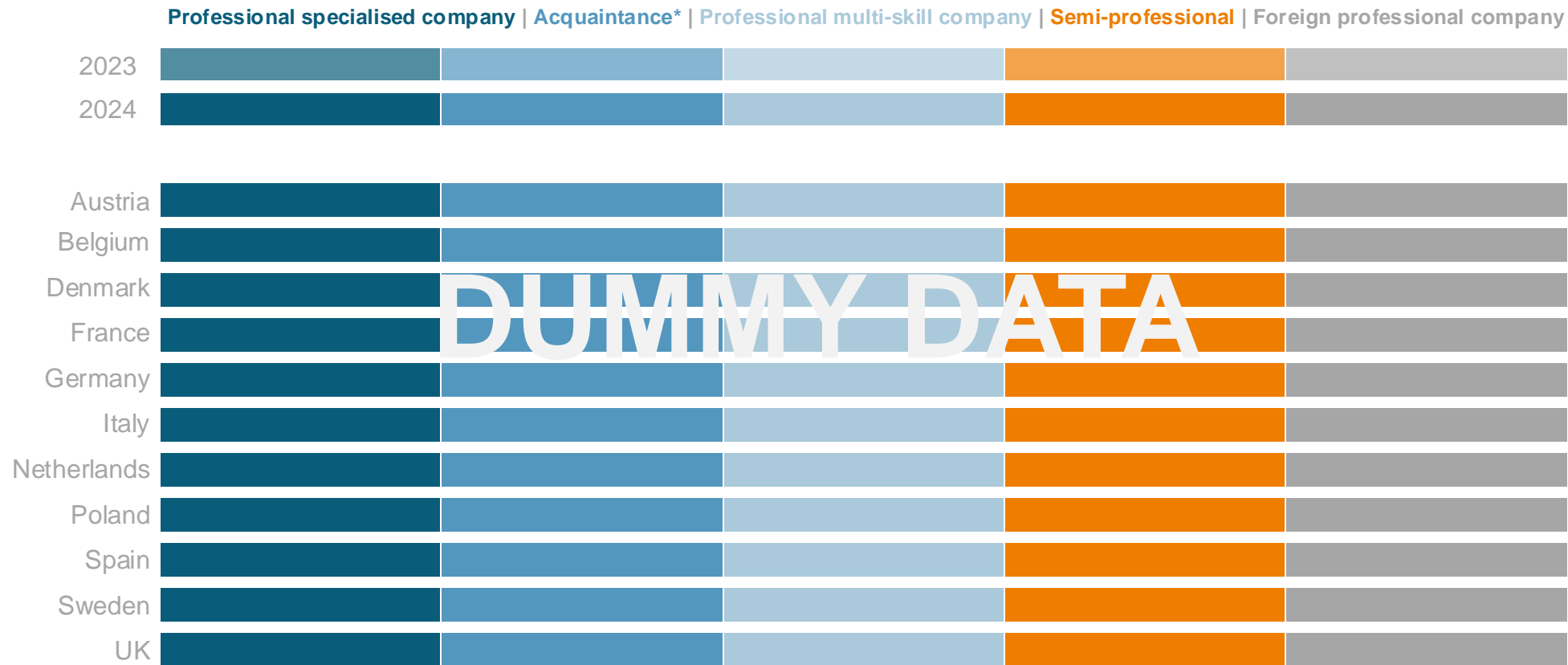
In this chapter, we examine DIY vs. DIFM trends on a country level:

- DIY vs. DIFM development over years
- Who was involved in (performed) the work activities?
- What is your most important barrier to doing home improvement jobs?
- What is your most important barrier to doing home improvement jobs?
- How far are you with planning your renovation?
- How satisfied were you with the following aspects of the service?

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Outsourcing home improvement jobs

Could you divide 100% of the total amount of work that you outsourced in the past two years between the mentioned companies/persons?



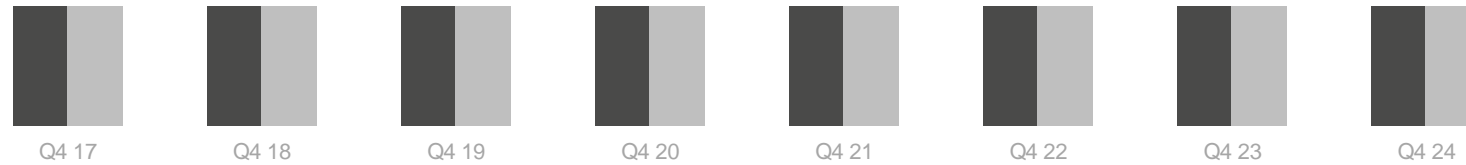
Base: N = x
 Values below 5% are not labelled
 * Acquaintance: Someone the respondent knows and didn't have to pay (e.g. friend / family) and persons from their own household are excluded

GERMANY

Share of households that did a home improvement job

GERMANY
EU AVERAGE

DUMMY DATA

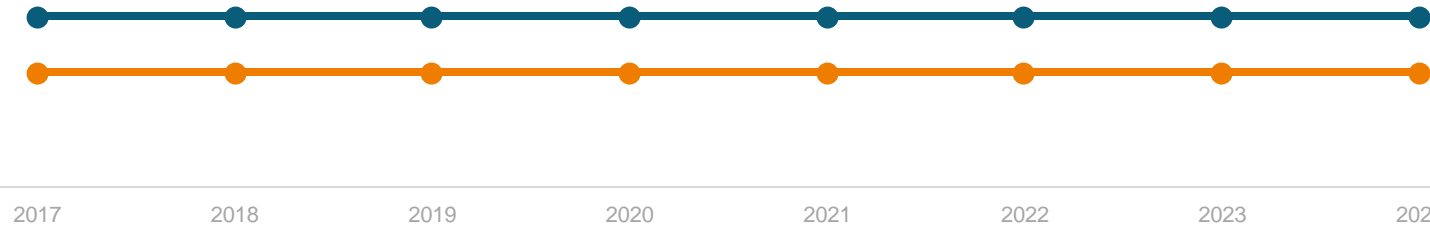


Base: N=2,400 per year

DIY vs DIFM development over years

DIY
DIFM

DUMMY DATA



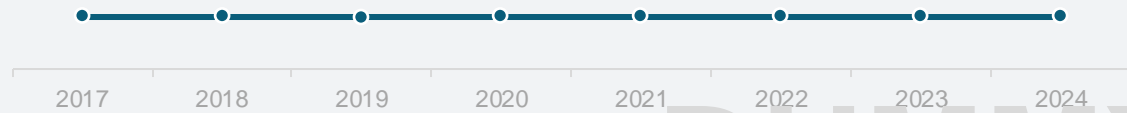
GERMANY

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DIY home improvement market

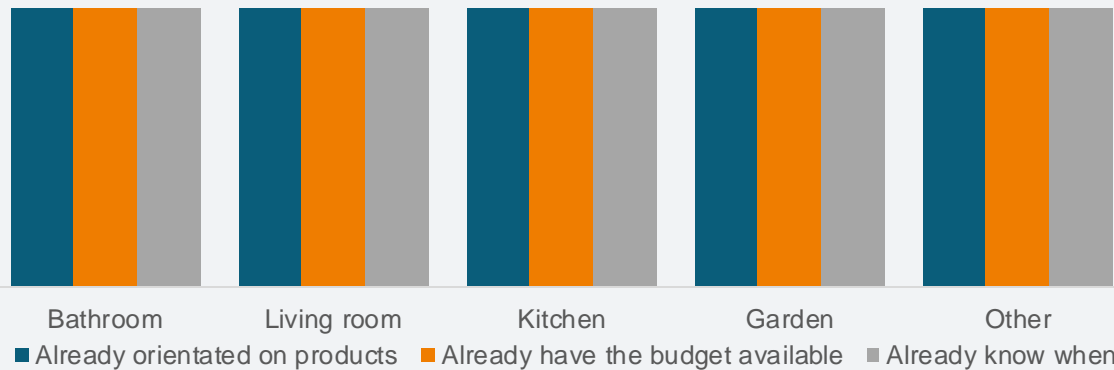
Who was involved in (performed) the work activities? – Myself/ my partner

% DIY



Planned home renovations

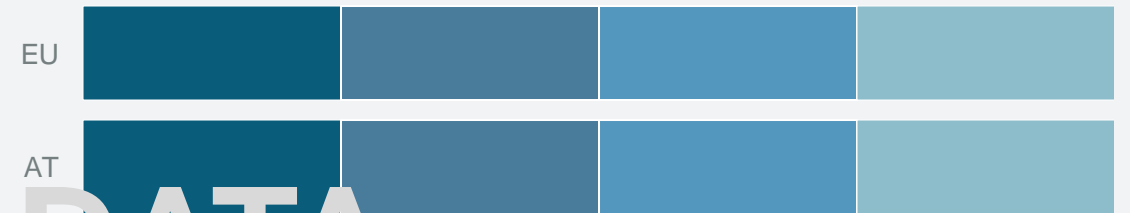
How far are you with planning your renovation?



Barriers to home improvement

What is your most important barrier to doing home improvement jobs?

Exp. products | Exp. professionals | Unreliable professionals | No time | Don't like it | DK



Satisfaction with professional services

How satisfied were you with the following aspects of the service?

Balance: % (Very satisfied + satisfied) minus % (Very dissatisfied + dissatisfied)



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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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