

A person wearing a white t-shirt and dark overalls is seen from behind, painting a light-colored wall with a brush. The person's right hand is holding the brush, which is in contact with the wall. A semi-transparent teal banner is overlaid across the middle of the image, containing the title text.

European Home Improvement Monitor Q4 2021

DIY versus DIFM

A product by **USP** Marketing Consultancy

Preface

The previous year has been very successful for the DIY markets in most European countries. According to our study, the total consumer spending on home improvement increased by 20%. There are three reasons for this spectacular growth visible in our data:

- The number of European households that did a home improvement job increased
- The total number of jobs done by professionals increased
- The average spending per job increased. This is caused by higher prices for the products and labour but also by more luxurious choices consumers make.

Even though bigger projects were done, which are more challenging, consumers are still doing a large part of the projects themselves. The increased attention for DIY during the COVID-19 pandemic appears to have continued in 2021.

In the theme part of this report, we take a closer look at how consumers involve professionals in their home improvement projects: How often do they hire a professional? What projects are they planning to do in 2022? This and more can be found in chapter 3.

The quarterly focus & topics in 2021:

Q1 Focus: **Orientation**. Theme topic: **Sustainability**

Q2 Focus: **Purchase channels**. Theme topic: **Impact of online orientation**

Q3 Focus: **Branding**. Theme topic: **Name brands vs private labels**

Q4 Focus: **DIY vs DIFM**. Theme topic: **DIY versus DIFM**

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

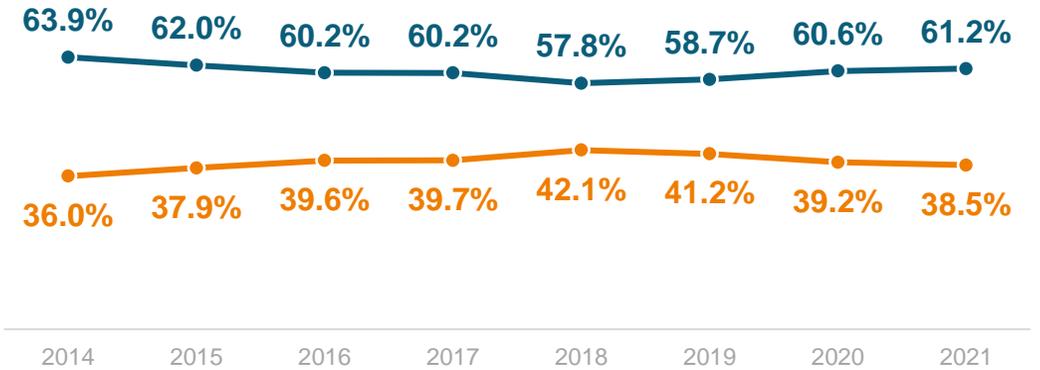
Since 2019 DIY is on the rise

Increasingly more DIY in the past two years....

From the start of the European Home improvement Monitor in 2013, we have been measuring the share of DIY jobs versus outsourced or Do-It-For-Me (DIFM) jobs.....

However, in the most recent years we see an increased share of DIY due to labour shortage in the construction market and the effect of the COVID 19 pandemic.....

Base: n=27,000 per year | EU averages are weighted in order to account for population size



Increase attention for DIY as a result of COVID-19.....

This trend towards more DIY continued in 2020, although the reason for this was.....

As long as the pandemic and lockdowns continue the share of DIY will....

The big question is if younger generations...

More DIY retailers offer ... to their customers

Lowering the threshold for home improvement projects

Throughout Europe many DIY stores are offering ... to consumers.

Various websites popped-up that offer consumers the opportunity to easily arrange

Also, the big e-commerce players are offering ...

Overview of DIY retailers offering ... (from the top 4)*

Austria	Belgium	Denmark	France	Germany	Italy	Netherlands	Poland	Spain	Sweden	UK
Unser Lagerhaus	Brico	Bauhaus	Brico Dépôt	Bauhaus	Brico Center	Gamma	Leroy Merlin	Bauhaus	Bauhaus	B&Q
Bauhaus	Gamma		Castorama	Toom	Bricioio	Hornbach	OBI	Brico Dépôt	Bygghmax	
Hornbach	Hubo		Leroy Merlin		Leroy Merlin	Karwei			Clas Ohlson	
						Praxis			Hornbach	

*Based on desk research: websites were checked in February 2022 for the offer of ... for 4 main DIY retailers in each of the 11 countries.

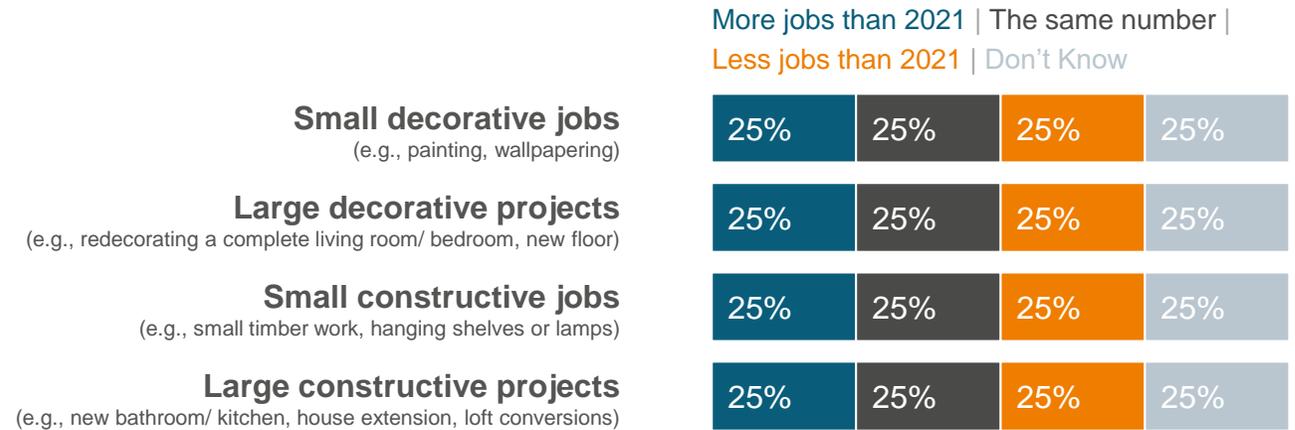
Future expectations, less ..., but higher ...

Future expectations on home improvement

The big question is

Home improvements jobs: 2022 vs 2021

Looking forward to **2022**, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than in **2021**?



Expected spending on home improvement in 2022

To what degree do you expect to spend more or less money on home improvement in 2022 compared to 2021?



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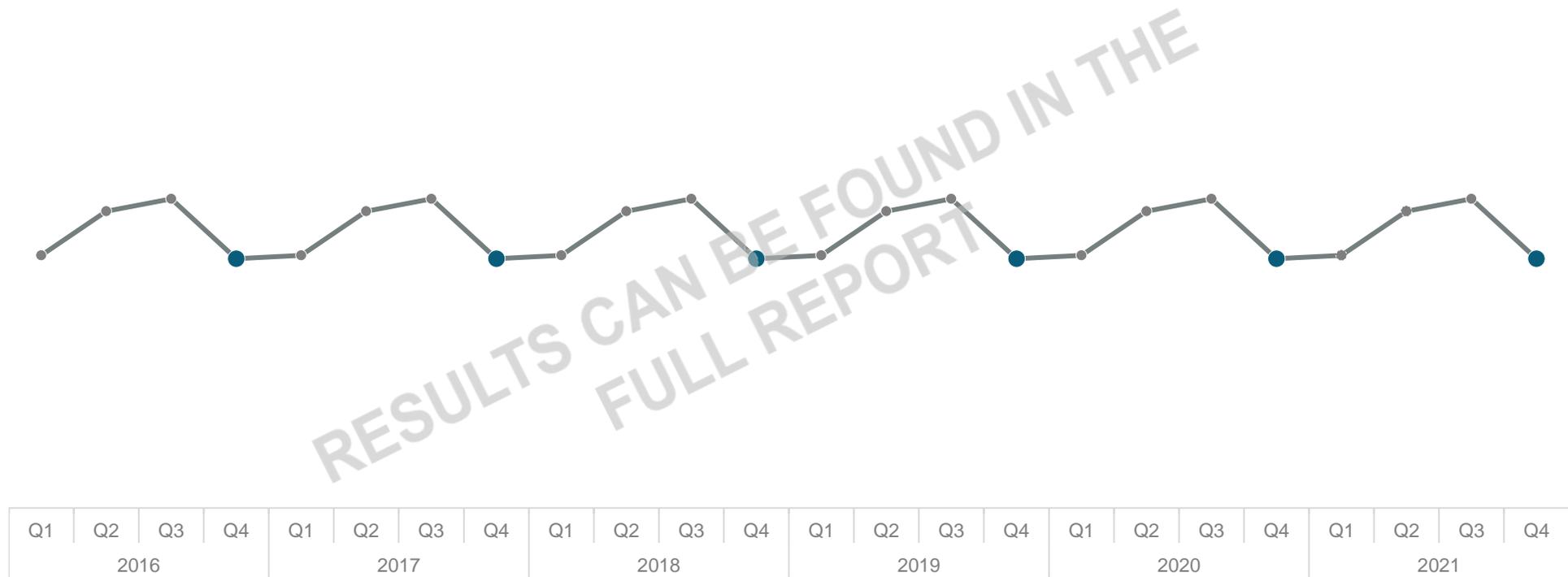
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Share of households that have done a home improvement job* – 2021 Q4



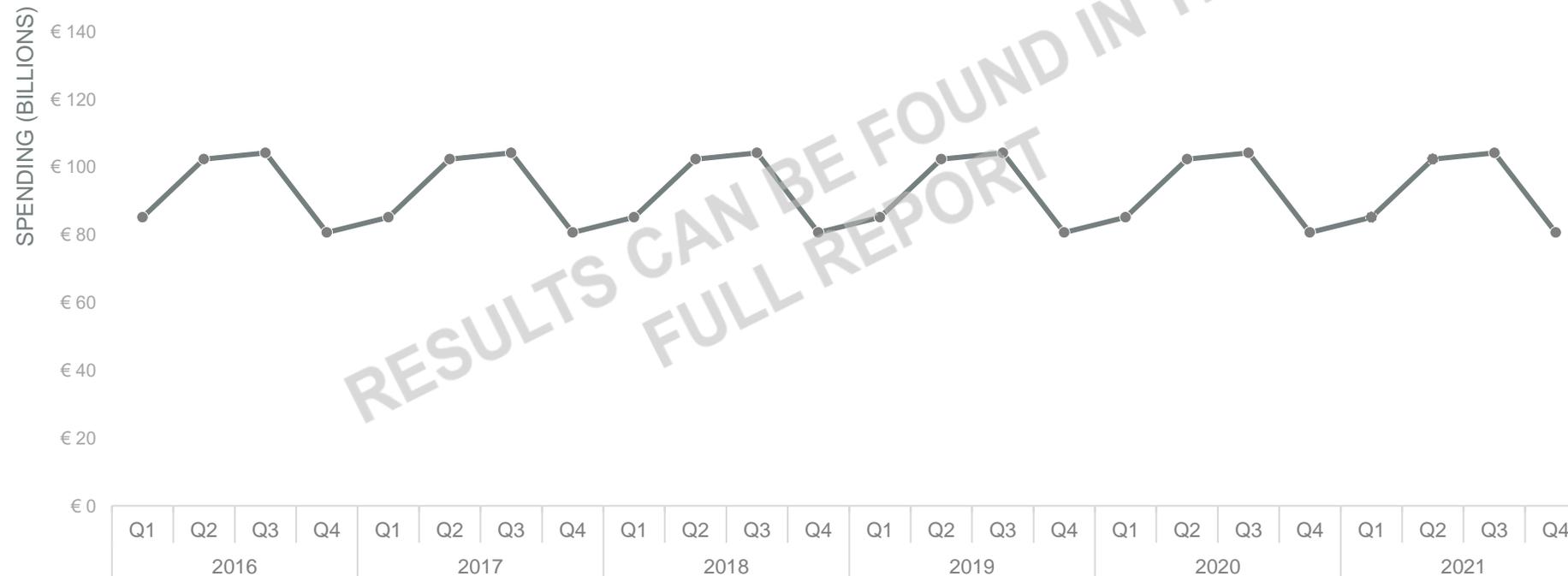
N = 6,600 interviews per quarter

*Consumers who reported a change to their house (bathroom, kitchen, garden, living room, bedroom, attic, other rooms, exterior of the house, installations, or safety & security) in the last 3 months.

European spending on home improvement

Total spending by European households on home improvement ... by x% in Q4 2021 compared to Q3 2021.

European spending on labour + material



European spending on home improvement – on the country level

When making a full year comparison to 2020, the spending in 2021 has ... by X% on the European level. While ... experience a drop in spending on home improvement, the spending has clearly increased in the ...

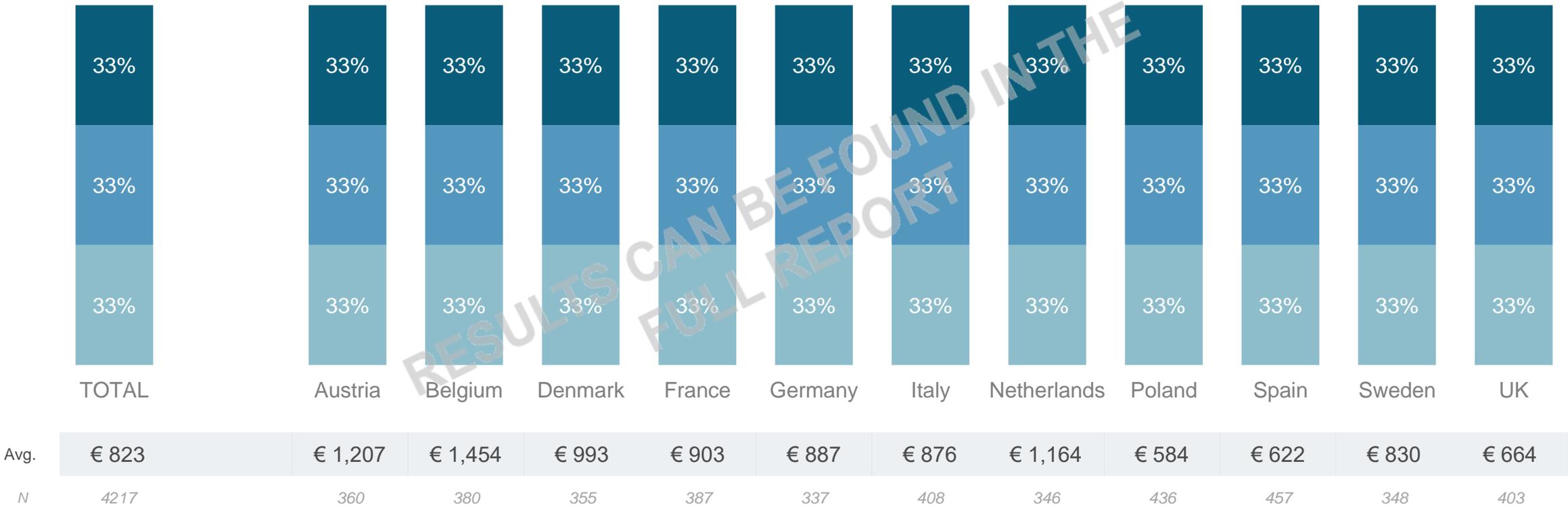
Main reason for the ... result on European level is ...

European spending on labour + material - 2021 vs. 2020



Spending on home improvement – 2021 Q4

€ 1- € 500 | € 501- € 1,000 | Over € 1,001

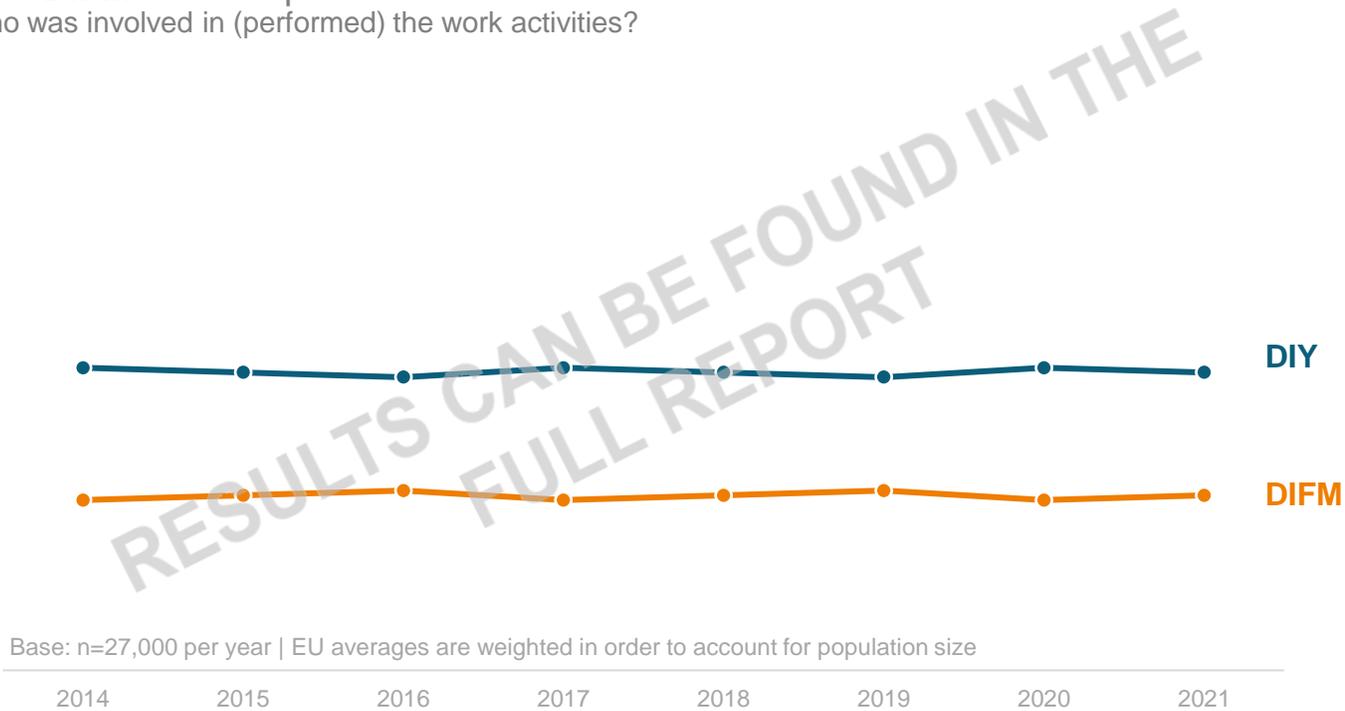


*Could you give an estimation on your spending on home improvement in the past 3 months (all products, materials and labour included)?
Only consumers who have done a home improvement job in the last 3 months and spent money on it are shown, excluding those who reported "Don't know".

The majority of home improvement jobs are

After a trend ... DIFM developing over the years, a... since 2019.

DIY/ DIFM home improvement market
Who was involved in (performed) the work activities?



Base: n=27,000 per year | EU averages are weighted in order to account for population size

19 product categories are included:

- | | | | |
|-------------------|-------------------|--------------------------|---------------|
| Boiler | Tile adhesive | Bathroom furniture | Taps & mixers |
| Flooring products | Wallpaper | Shower drain | Toilet |
| Lock | Window decoration | Shower enclosures | Washbasin |
| Paint | Roof window | Shower set / shower head | Whirlpool |
| Sealants | Bath | Shower tray | |

Number of home improvement jobs – on the country level

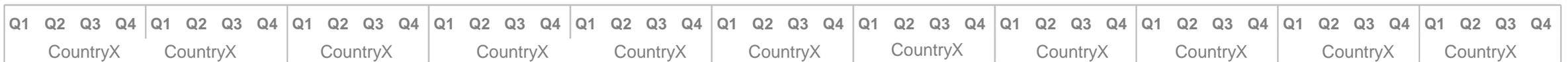
Compared to the same quarter of 2020, most countries did ... home improvement jobs in Q1 2021 (avg. X%), ... jobs in Q3 2021 (avg. X%), and ... jobs in Q2 and Q4 of 2021.

Number of home improvement jobs - 2021 vs. 2020

100%

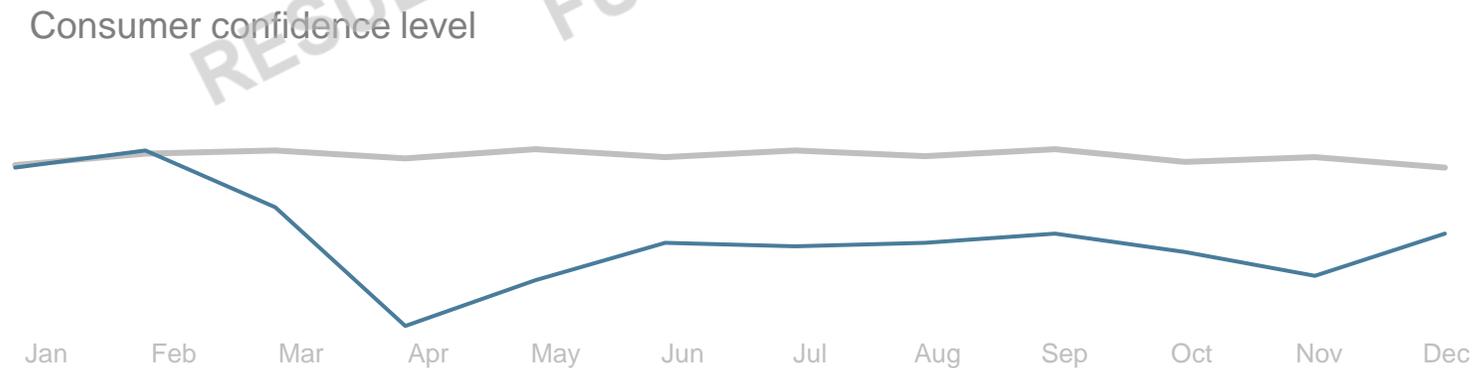
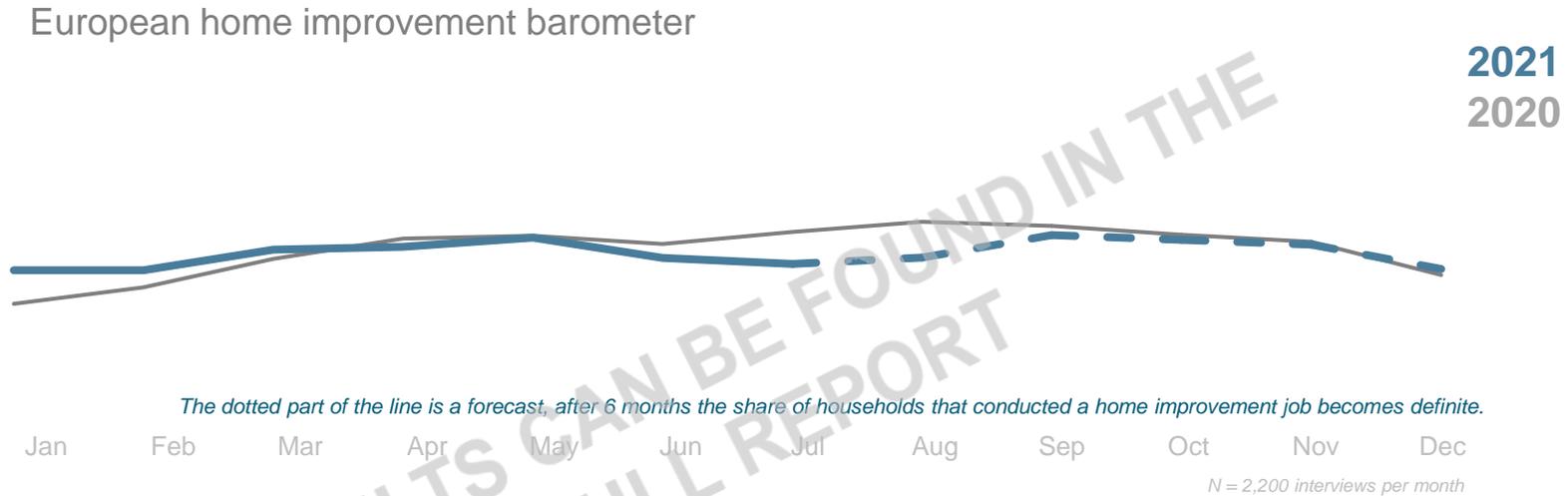
RESULTS CAN BE FOUND IN THE FULL REPORT

0%



Share of households conducting a home improvement job

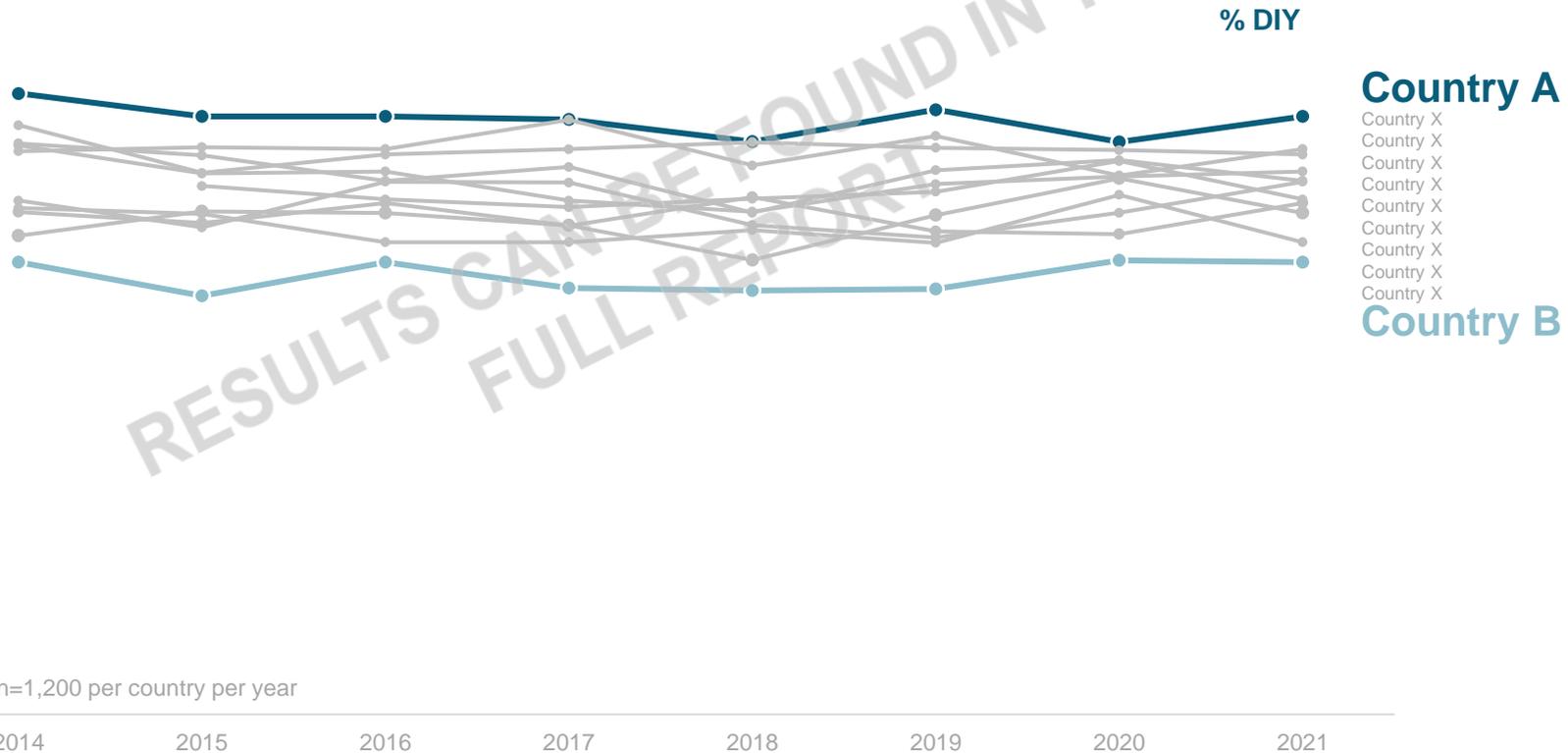
In Q4-21, the number of households that conducted a home improvement job is ... to Q4-20.



Traditionally share of DIY highest in ..., ... is more a DIFM market.

DIY home improvement market

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

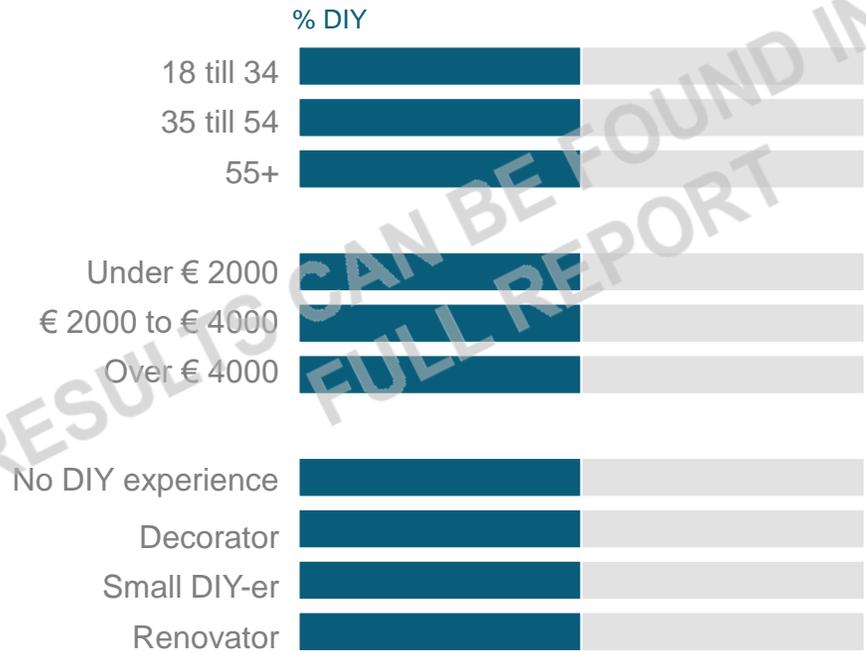


Base: n=1,200 per country per year

The more DIY skills a consumer has, the more likely they are to...

DIY home improvement market
Who was involved in (performed) the work activities?

RESULTS CAN BE FOUND IN THE FULL REPORT



Base: n=150,000 in total
EU averages are weighted

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Theme questions

In this chapter, the European overview regarding DIFM jobs will be shown. The respondents were asked the following:

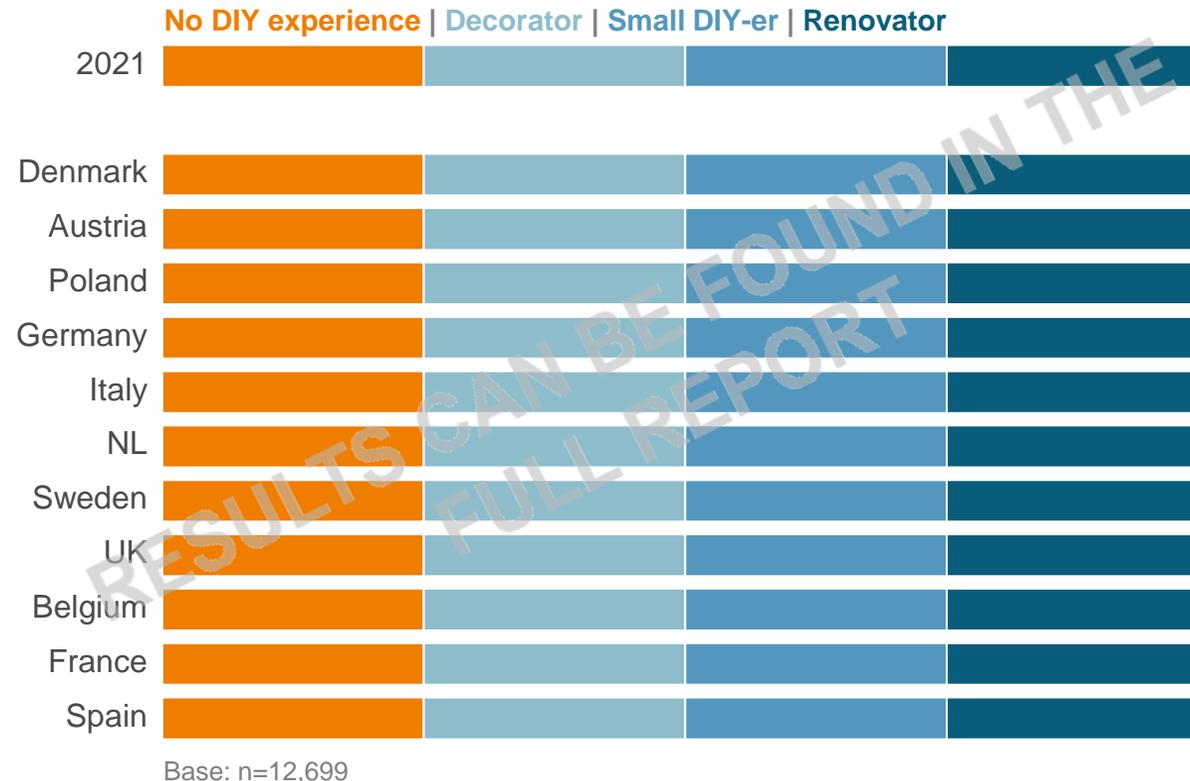


- Have you **outsourced** any home improvement projects in the past two years?
- When it comes to home improvement jobs and hiring professionals to do the job for you - What are your **expectations for the next 2 years**?
- Why do you expect to **hire a professional** for your home improvement jobs more often in the next two years?
- Why do you expect to **do home improvement jobs yourself** more often in the next two years?
- Imagine you want to hire a professional for **a paint job/ the installation of a new bathroom/ the installation of a roof window** in your house. Several stores that sell the product are offering professionals that can do the job for you as well - Which of the following **stores would you prefer for hiring the professional** for the job?
- If you decided to have a paint job done inside your house by a professional painter/_have a new bathroom installed by a professional/ have a new roof window installed by a professional. What would be **an acceptable time** to wait for his availability to do the job?
- Hiring professional labour for home improvement jobs is becoming more and more expensive. What **effect will this increase of labour price most likely have** on your future home improvement projects?
- What is **an acceptable price per hour** for you to pay for
 - a professional painter
 - a bathroom installer / plumber
 - a general contractor
- When people become older, they more often outsource home improvement jobs instead of doing it themselves. At what age do you expect to **outsource more home improvement jobs** instead of doing it yourself?
- At what age do you expect to **outsource all home improvement jobs**?

Almost ... of the consumers regard themselves as “Decorators” and ...have more DIY experience

DIY experience (based on whole-year data of 2021)

Q: Consumers can be assigned to groups based on their DIY experience. In which group would you place yourself?



Do DIY experience: I do not do any DIY jobs

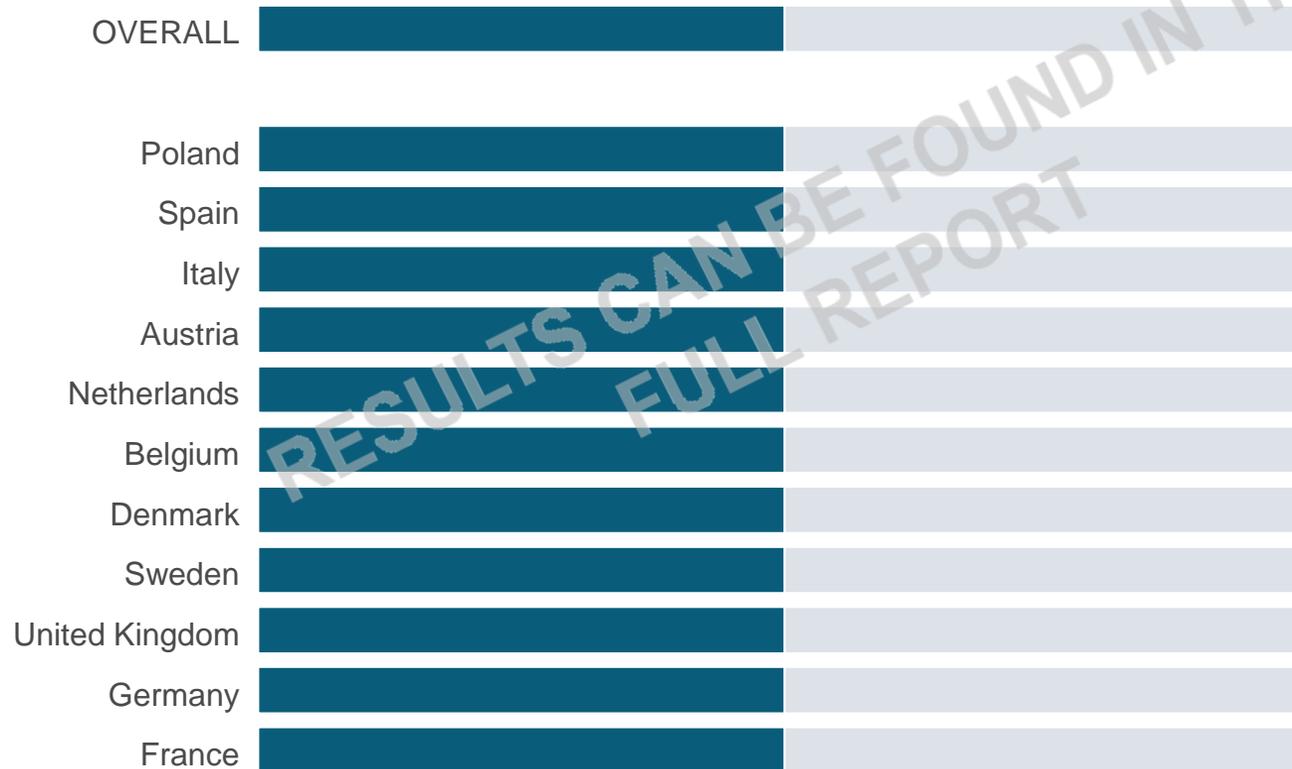
Decorator: The group that only buys home accessories (i.e., lamps, curtains, bathroom items) or only does light DIY jobs such as painting.

Small DIY-er: The slightly more experienced group, also does woodworking or hangs shelving

Renovator: The experienced DIY-er who will also replace taps and mixers and does tiling him/herself; The professional DIY-er who can renovate a kitchen or bathroom or who can build a conservatory

About ... the European households have outsourced one or more home improvement jobs in the past two years.

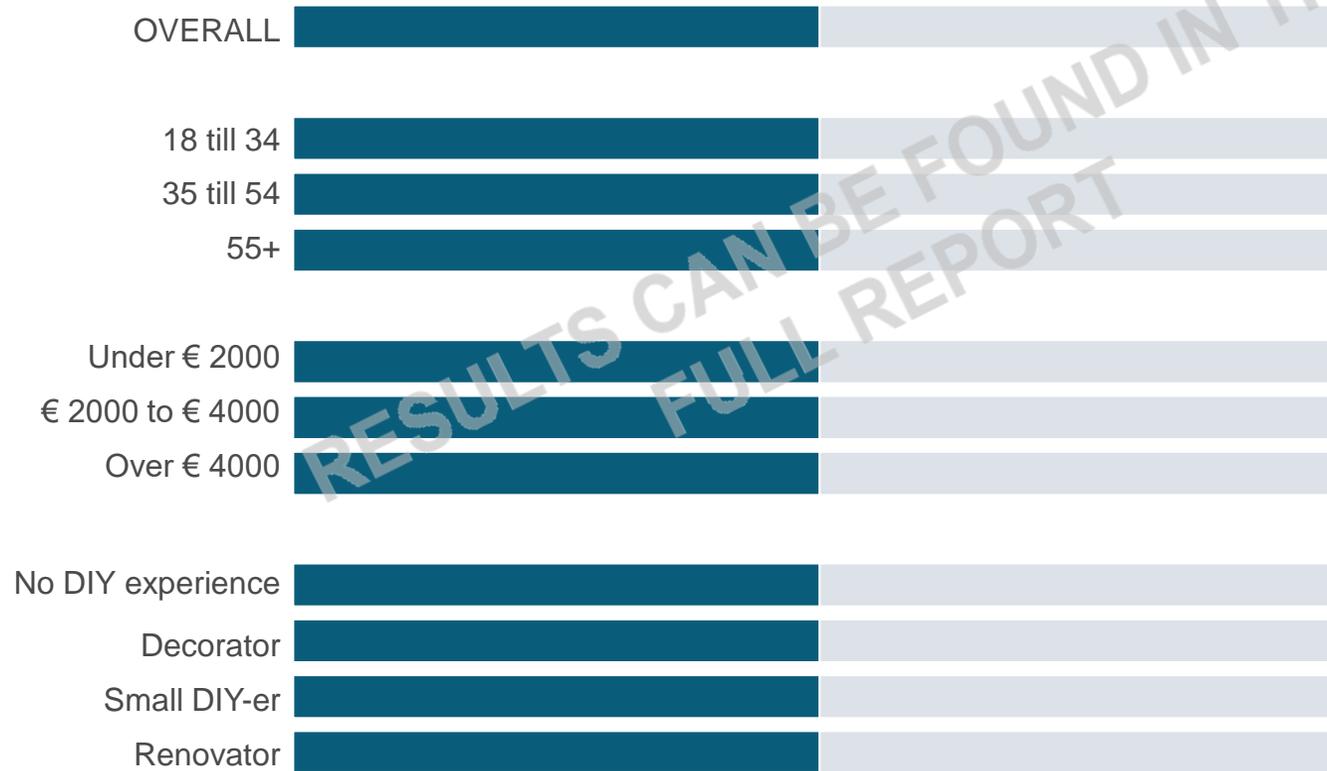
The share of households outsourced home improvement projects in the past 2 years
The share of households that have outsourced any home improvement projects to professional specialised company, acquaintance, professional multi-skill company, semi-professional, or foreign professional company/ person



Base: n=4,399

... has outsourced more home improvements in the past two years.

The share of households outsourced home improvement projects in the past 2 years
 The share of households that have outsourced any home improvement projects to professional specialised company, acquaintance, professional multi-skill company, semi-professional, or foreign professional company/ person

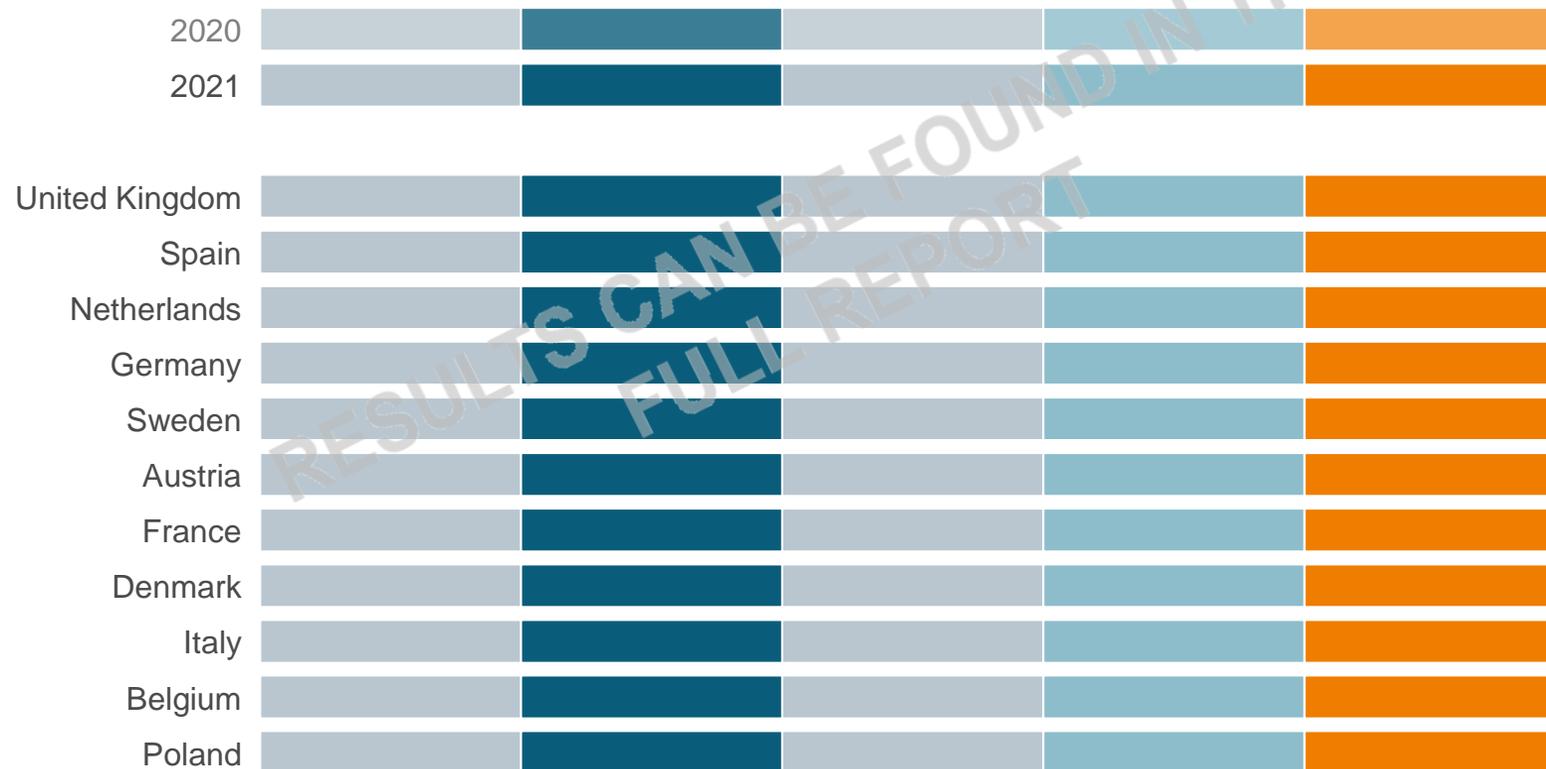


Base: n=4,399

In the majority of the outsourced projects, ... are hired. Remarkably, in 2021 ... was outsourced to family and friends.

The distribution of market parties to whom home improvement projects are outsourced in the past 2 years
Have you outsourced any home improvement projects to the following companies/persons in the past two years?

Professional specialized company | Acquaintance* | Professional multi-skill company | Semi-professional | Foreign professional company



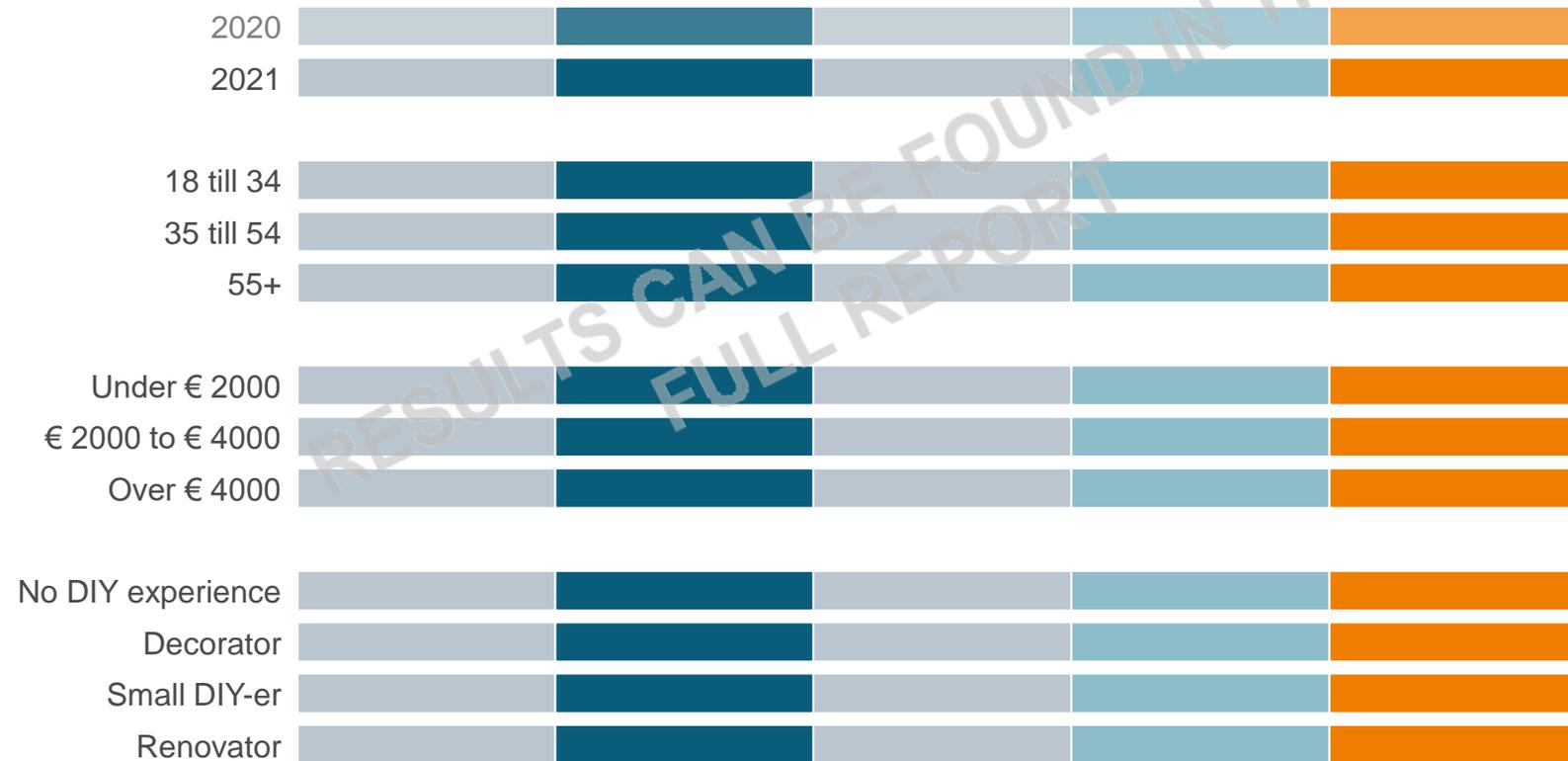
Base: n=4,399

* Acquaintance: Someone the respondent knows and didn't have to pay (e.g. friend / family) and persons from their own household are excluded

... are more likely to outsource jobs to their acquaintances.

The distribution of market parties to whom home improvement projects are outsourced in the past 2 years
 Have you outsourced any home improvement projects to the following companies/persons in the past two years?

Professional specialized company | **Acquaintance*** | Professional multi-skill company | Semi-professional | Foreign professional company



Base: n=4,399

* Acquaintance: Someone the respondent knows and didn't have to pay (e.g. friend / family) and persons from their own household are excluded

... appear to be the most preferred channel for hiring a professional. Most consumers consider ... the acceptable waiting time for hiring a professional.

Preferred channel for hiring a professional

Which of the following stores would you prefer for hiring the professional for ...?

Acceptable waiting time for hiring a professional

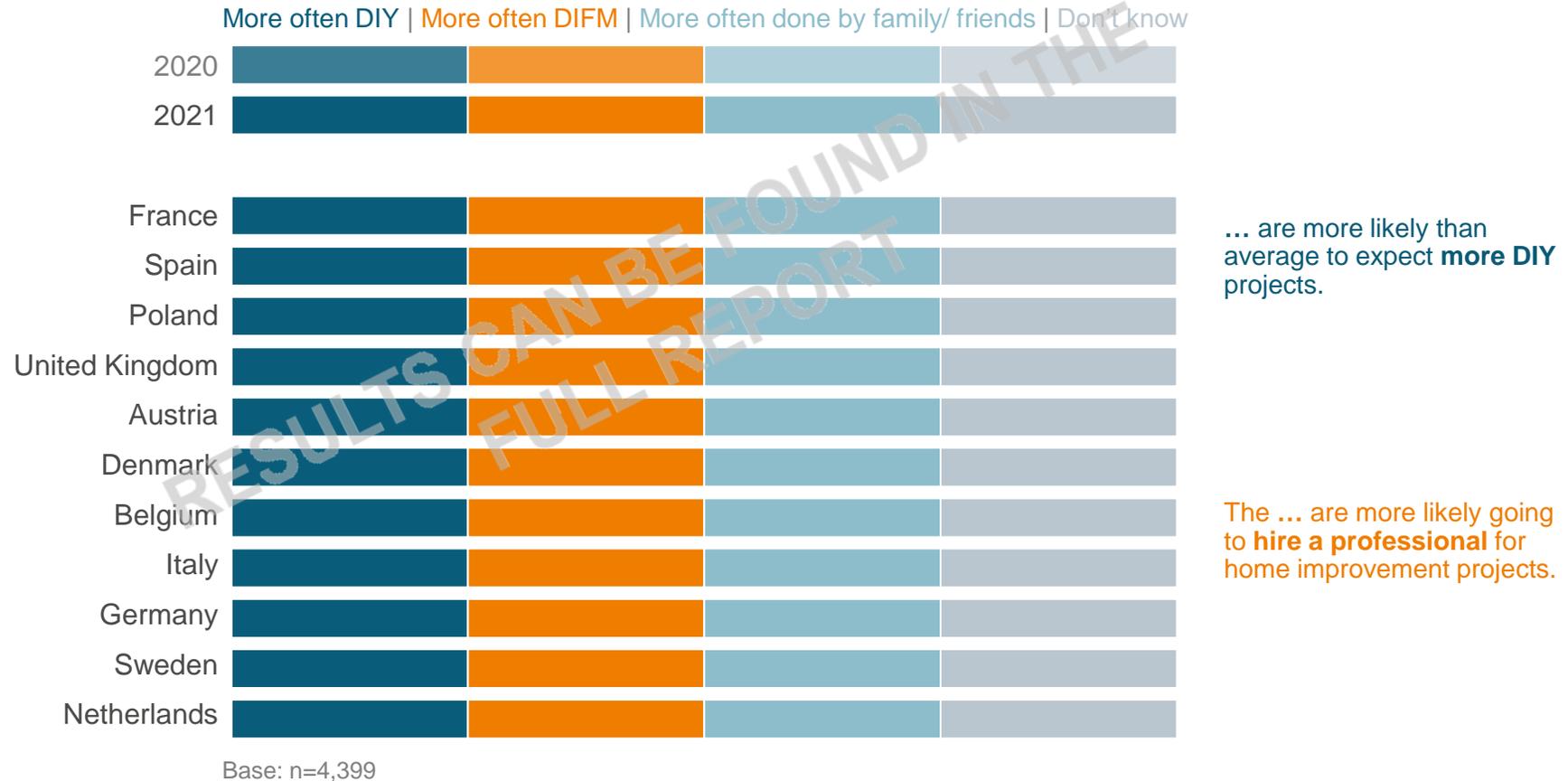
What would be an acceptable time to wait for his availability to do the job for ...?



Consumers continue to expect ... DIY in the coming 2 years on European level.

Expectations for hiring professionals

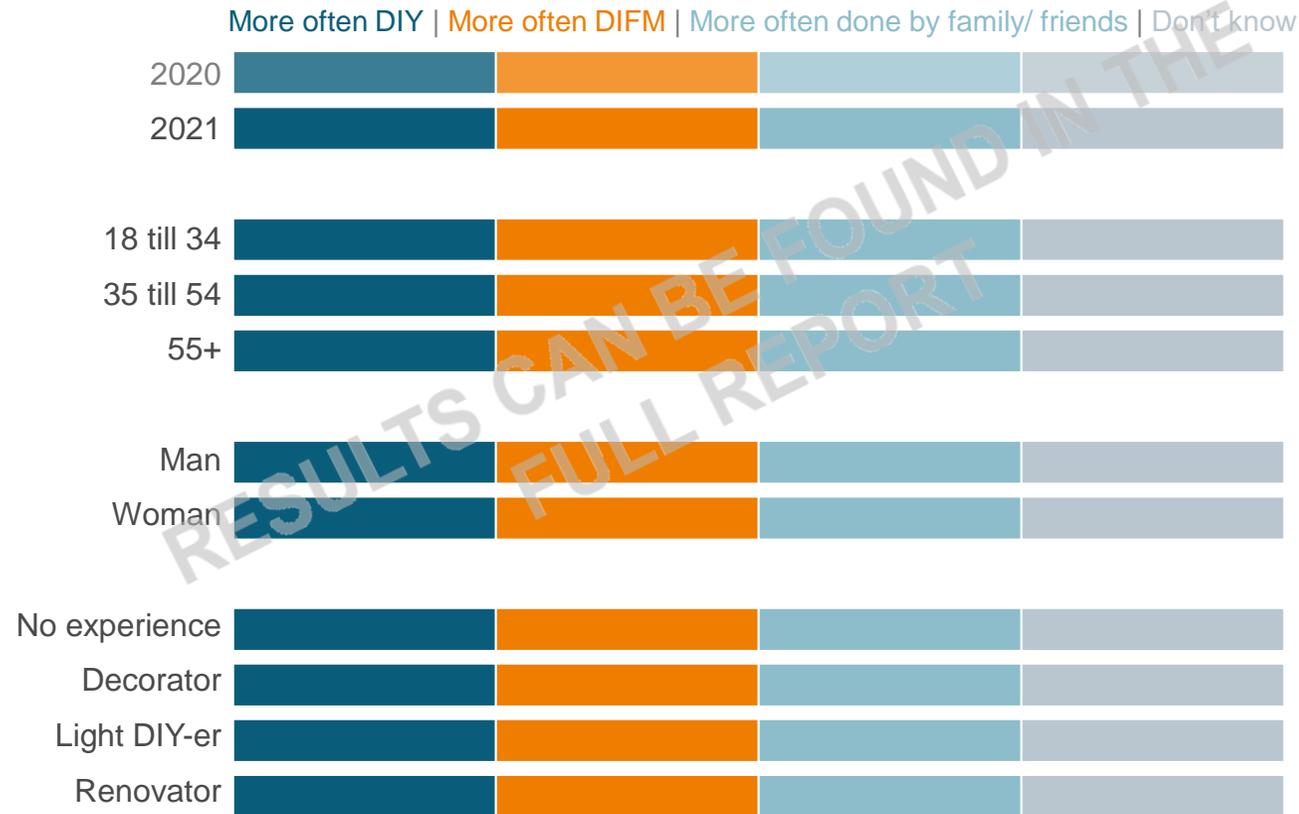
When it comes to hiring professionals to do the home improvement jobs for you, what are your expectations for the next 2 years?



... are more likely than ... to expect more DIY in the coming 2 years.

Expectations for hiring professionals

When it comes to hiring professionals to do the home improvement jobs for you, what are your expectations for the next 2 years?

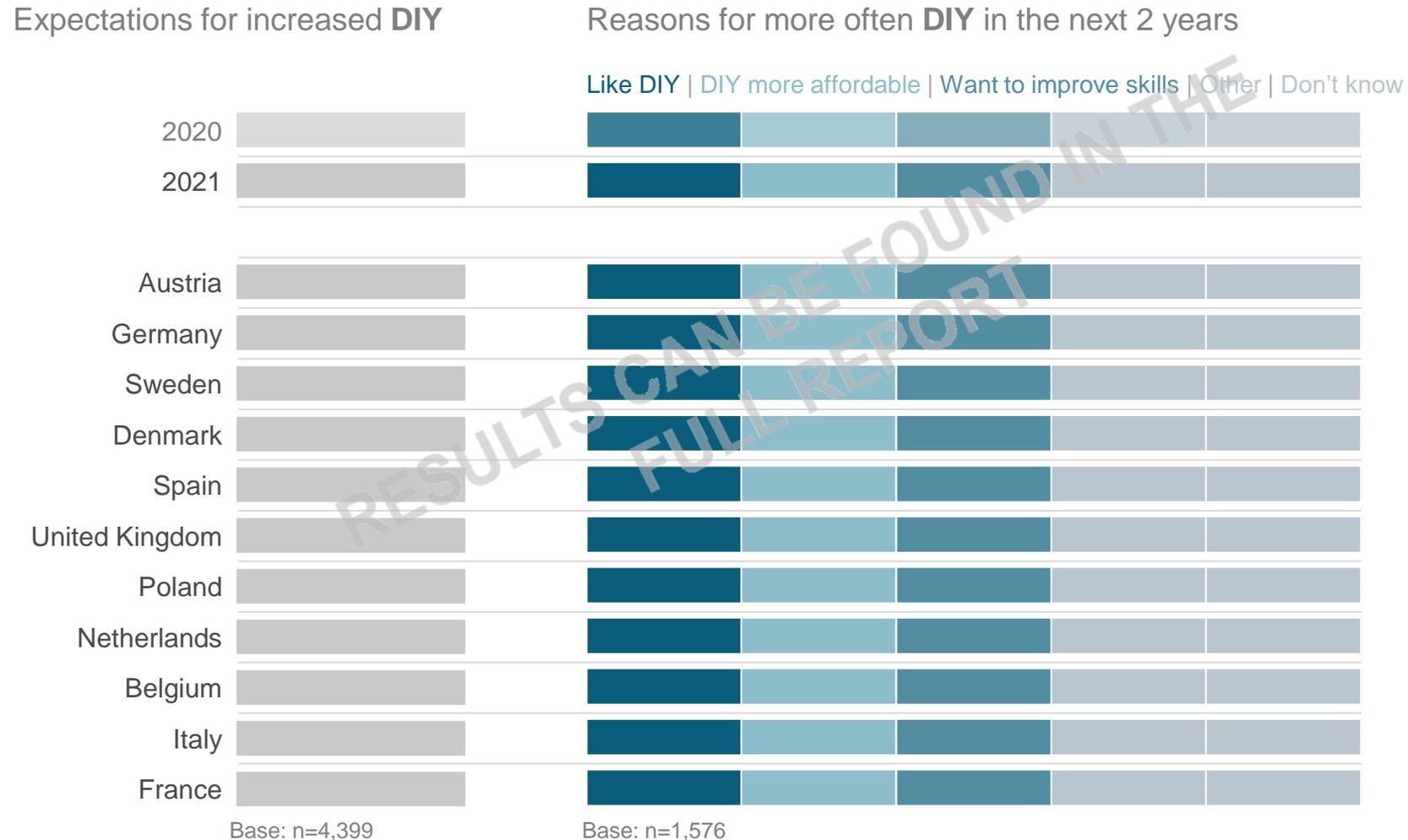


Base: n=4,399

... are more likely than women to opt for **DIY**.

The ... one has, the **more likely** that one will **DIY**.

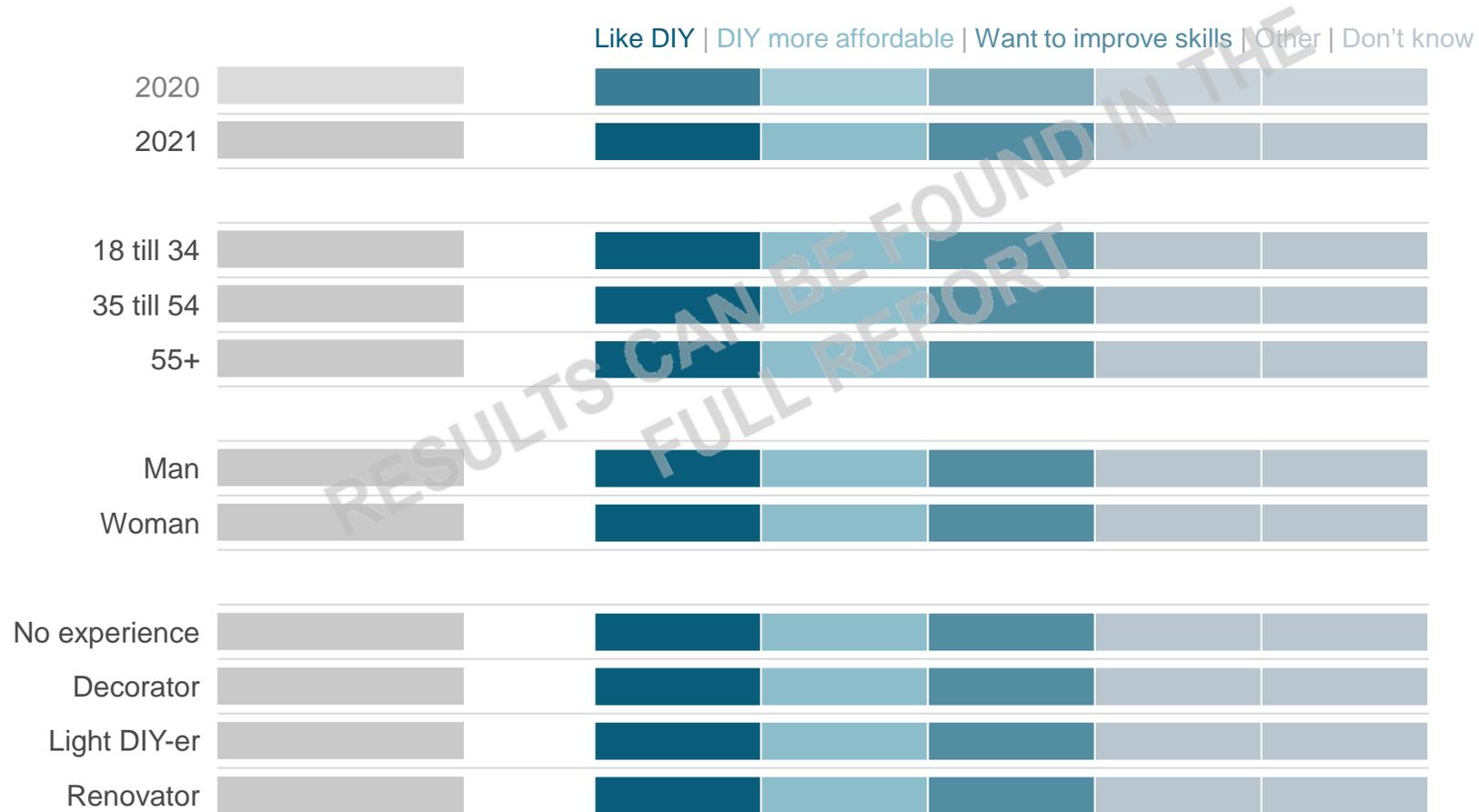
... is the most important reason for the expected increase of DIY.



The degree of enjoying DIY increased with ...

Expectations for increased **DIY**

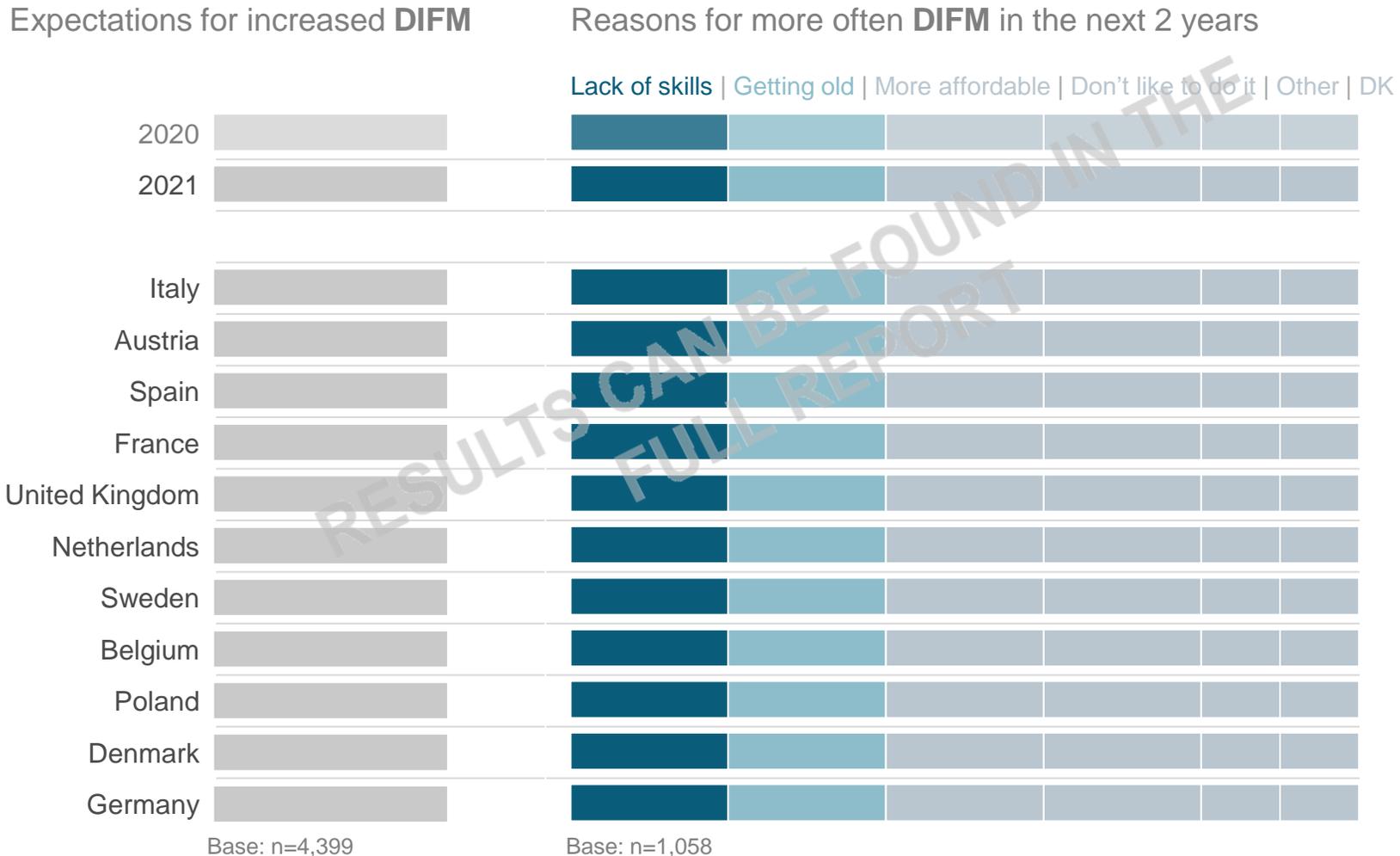
Reasons for more often **DIY** in the next 2 years



Base: n=4,399

Base: n=1,576

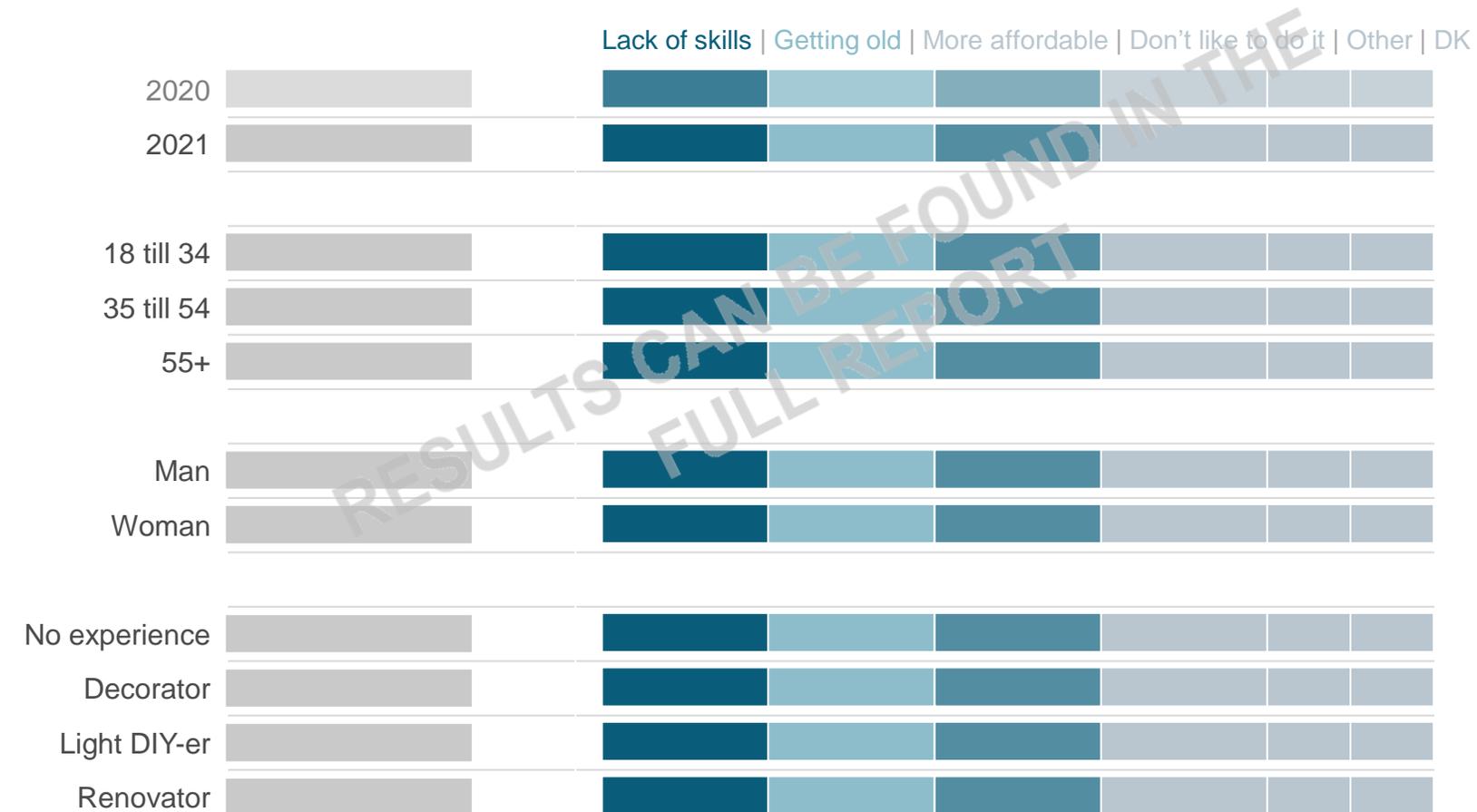
Next to ..., ... is the most important reason for consumers that expect to more often outsource projects in the next two years.



... are less likely than ... consumers to outsource the jobs due to a lack of skill.

Expectations for increased **DIFM**

Reasons for more often **DIFM** in the next 2 years



Lack of skills | Getting old | More affordable | Don't like to do it | Other | DK

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As expected, ... is a more relevant factor for **the oldest** people.

Those ... choose to outsource the home improvement project largely because of the

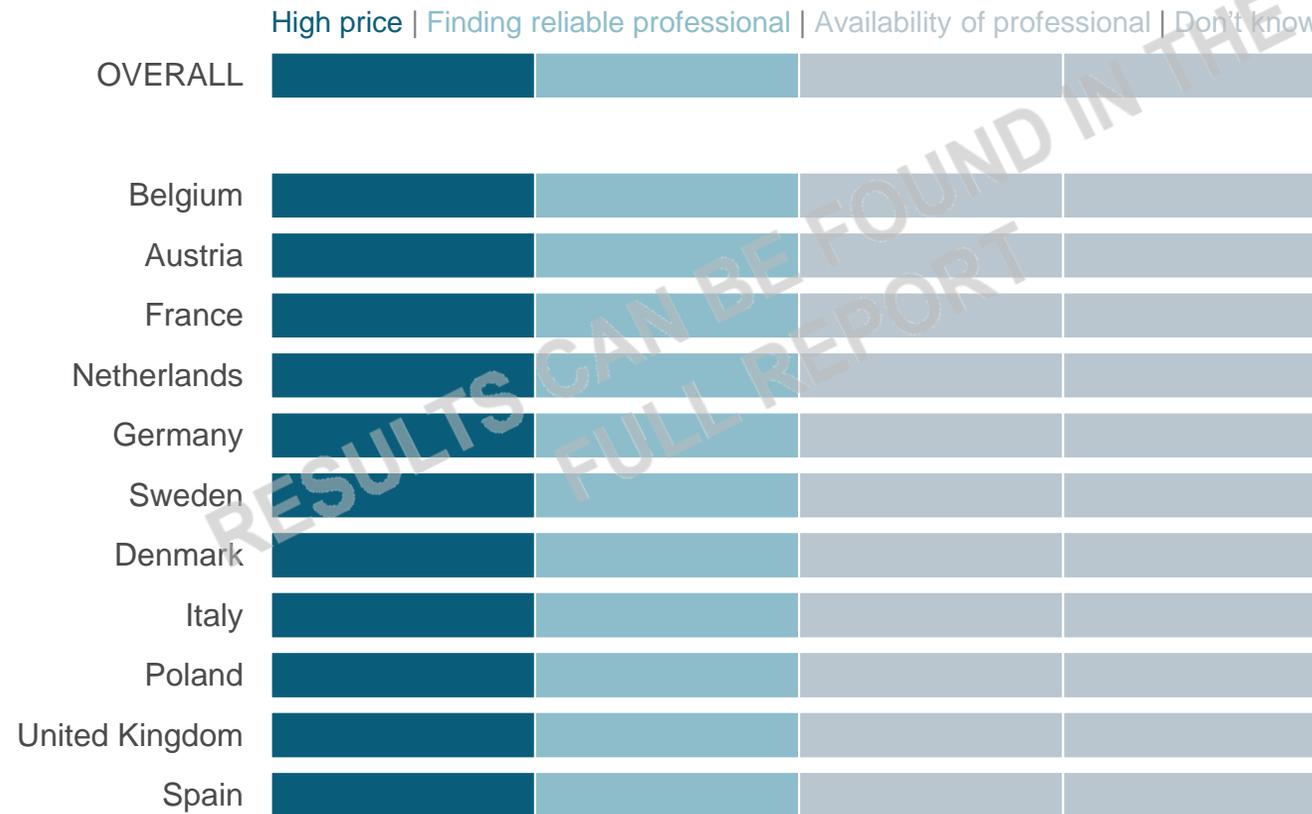
Base: n=4,399

Base: n=1,058

... is perceived to be the biggest barrier to hire a professional.

Main barrier for hiring professionals

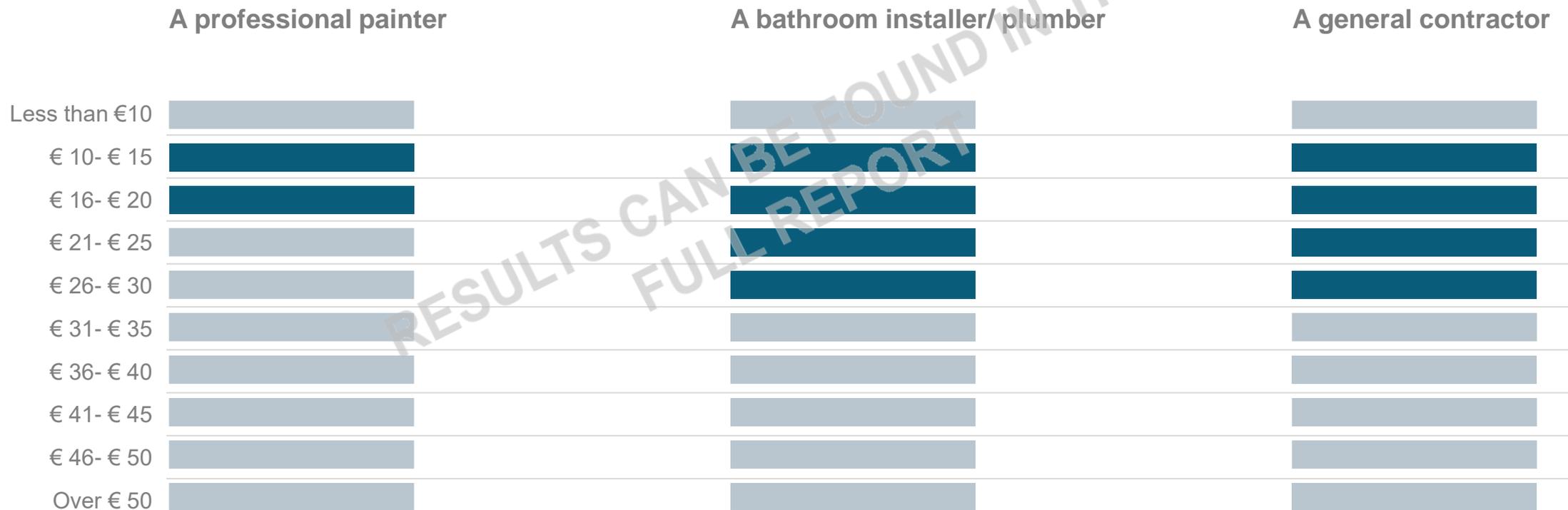
What do you see as the main barrier to hire a professional for a home improvement job?



Base: n=4,399

Consumers are likely to pay more for ... than for ...

Acceptable hourly wage for hiring professional – among consumers who have outsourced before
 What is an acceptable price per hour for you to pay for...?

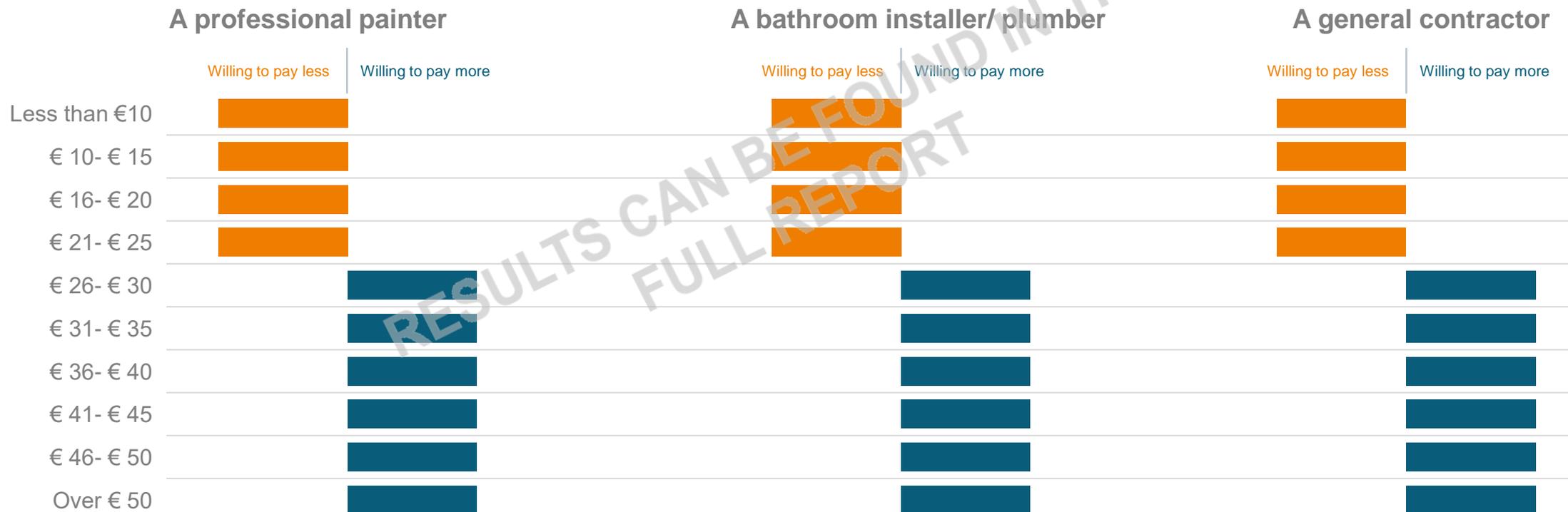


* The result is based on **consumers who have outsourced home improvements projects** in the past two years (n=2,020).

Consumers that ... are willing to pay a professional a higher price than those ...

Acceptable hourly wage for hiring professional – comparison between consumers who have outsourced before who haven't
What is an acceptable price per hour for you to pay for...?

% from those who have outsourced before minus % from those who never outsource



* The result is based on the differences between **consumers who have outsourced home improvements projects in the past two years (n=2,020)** and those who haven't (n=2,379).

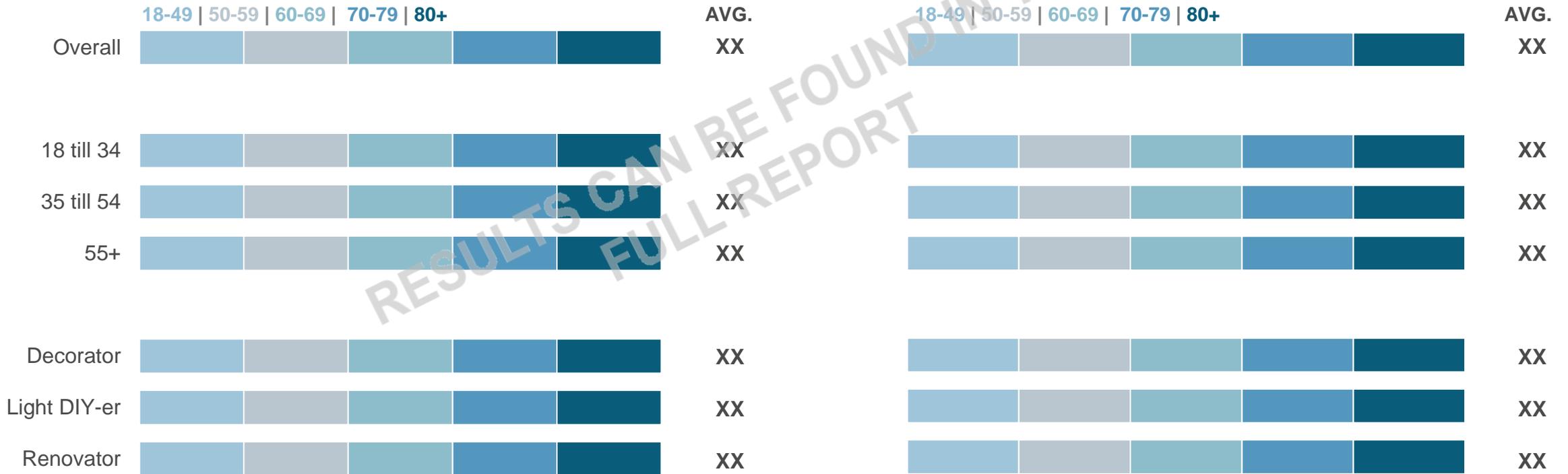
The older generations expect to continue DIY ...

Expected age of outsourcing **MORE** jobs

At what age do you expect to outsource **more** home improvement jobs instead of doing it yourself?

Expected age of outsourcing **ALL** jobs

At what age do you expect to outsource **all** home improvement jobs instead of doing it yourself?



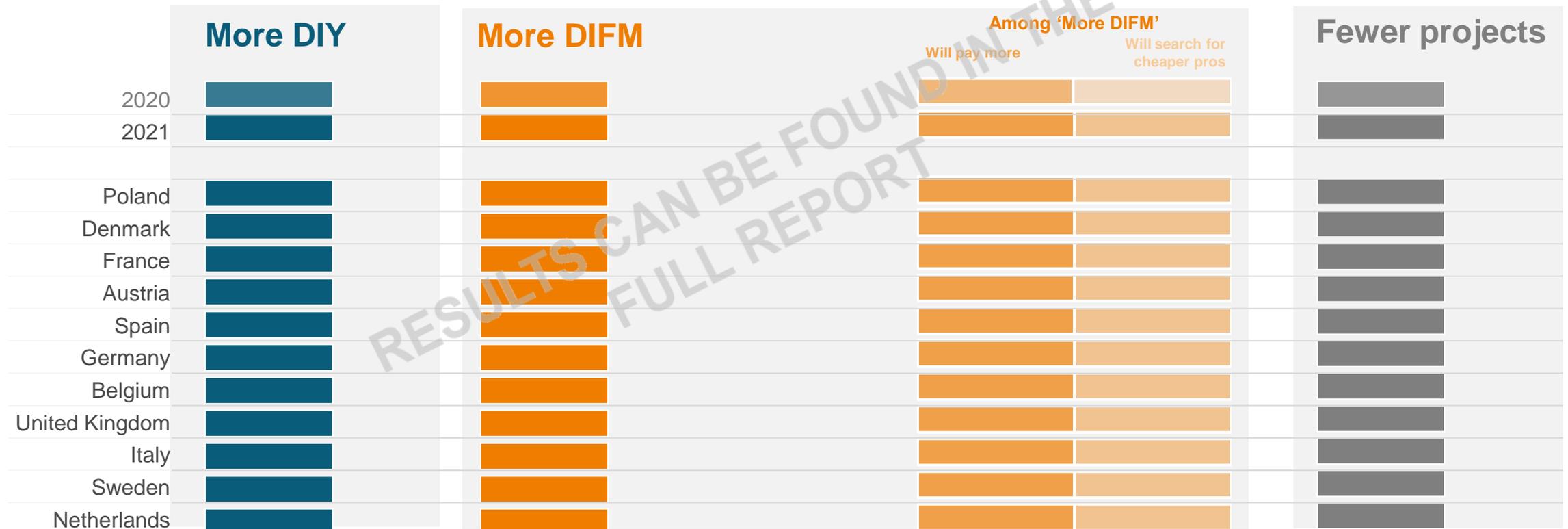
Base: n=2,859

* The question is asked to consumers have DIY experience, excluding those who report no DIY experience.

Despite ..., consumers expect ... DIFM in 2020 as in 2019.

Effects of increased labour price of the professional

Hiring professional labour for home improvement jobs is becoming more and more expensive. What effect will this increase of labour price most likely have on your future home improvement projects?

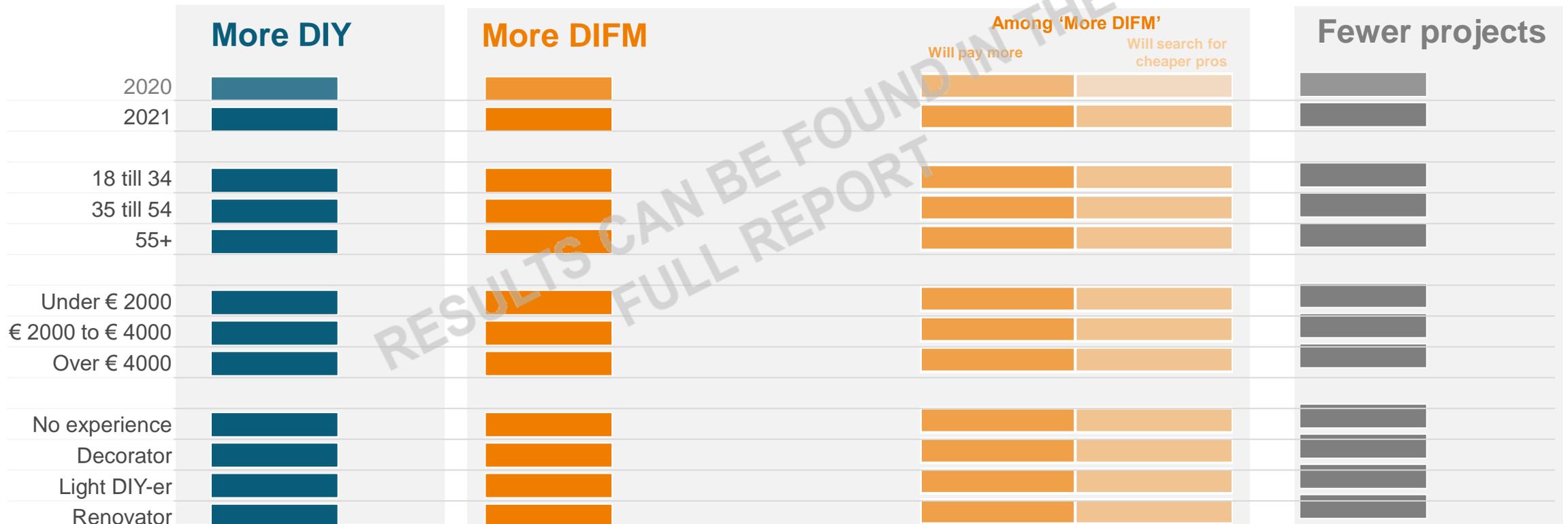


Base: n=4,399

Due to the ..., consumers with more DIY experience are more likely to do ...

Effects of increased labour price of the professional

Hiring professional labour for home improvement jobs is becoming more and more expensive. What effect will this increase of labour price most likely have on your future home improvement projects?



Base: n=4,399

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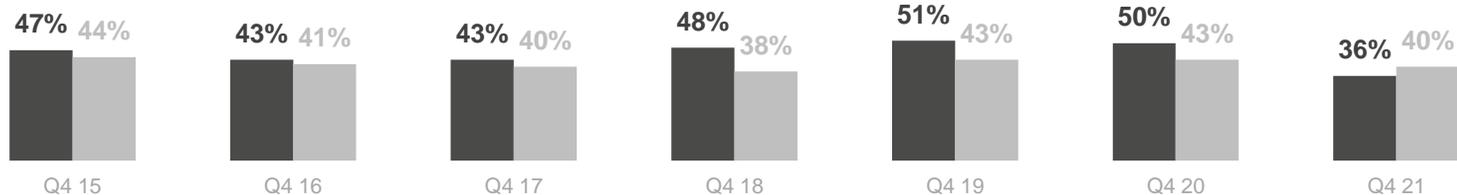


USP

POLAND

Share of households that did a home improvement job

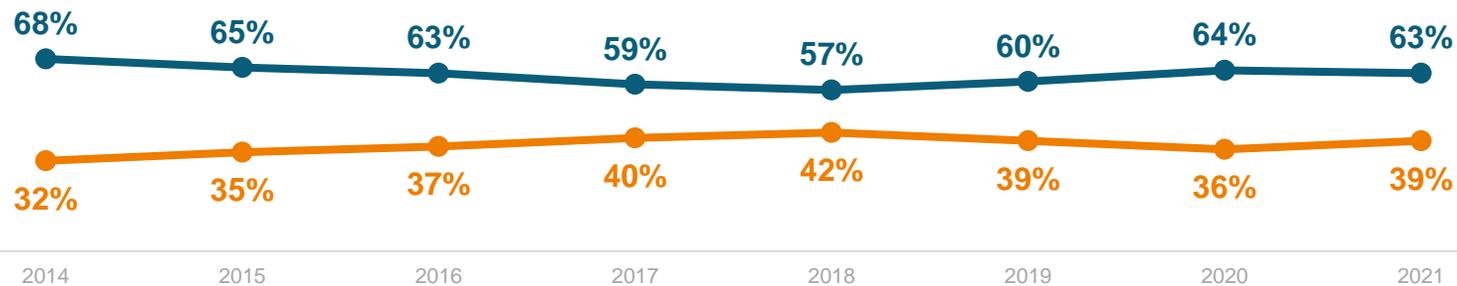
POLAND
EU AVERAGE



Base: n=2,400 per year

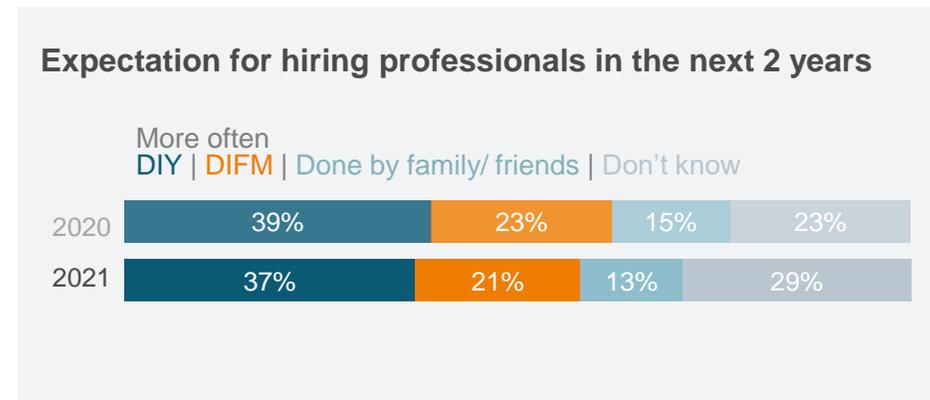
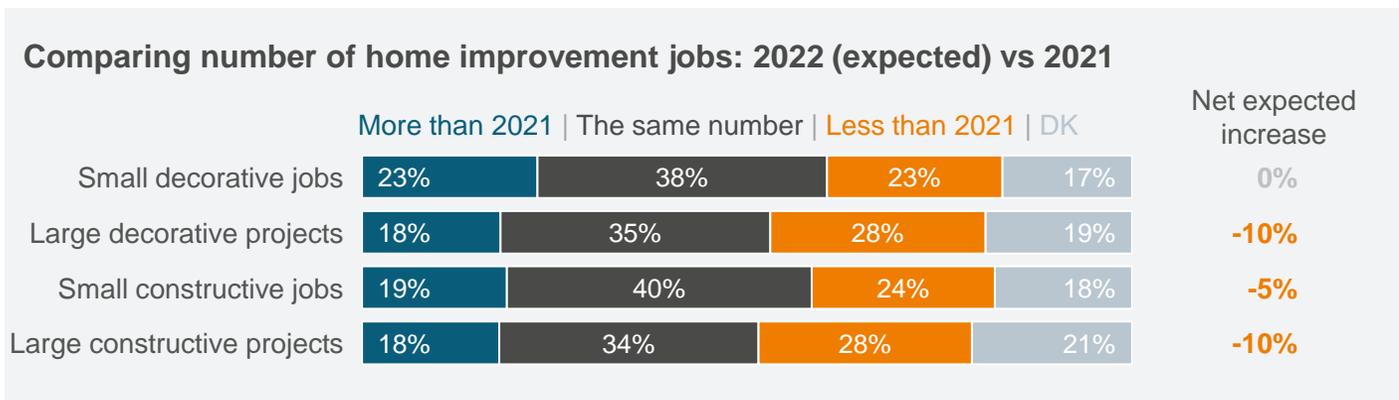
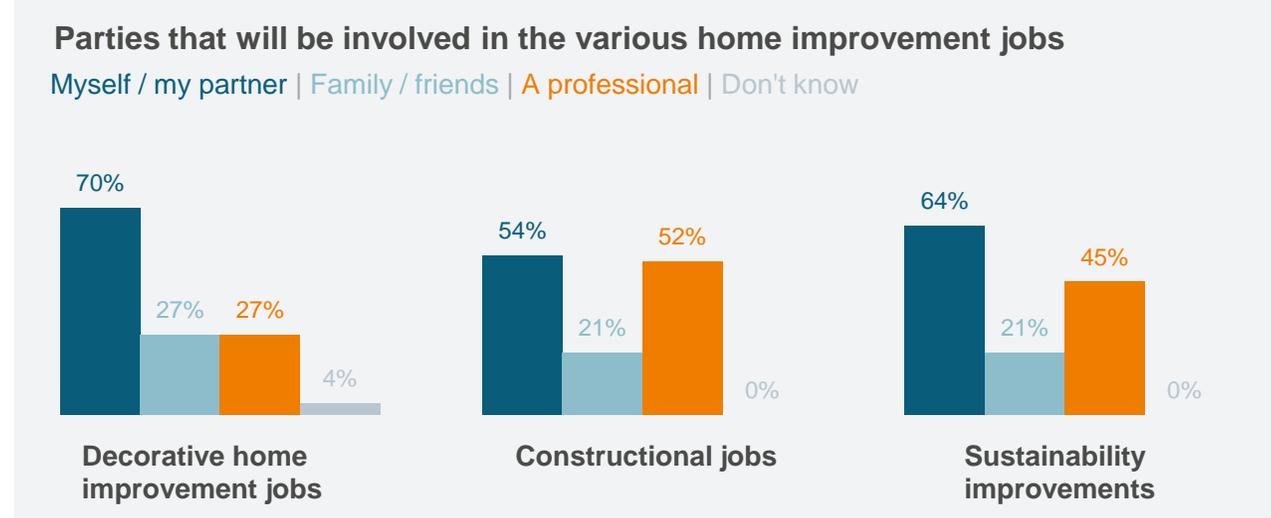
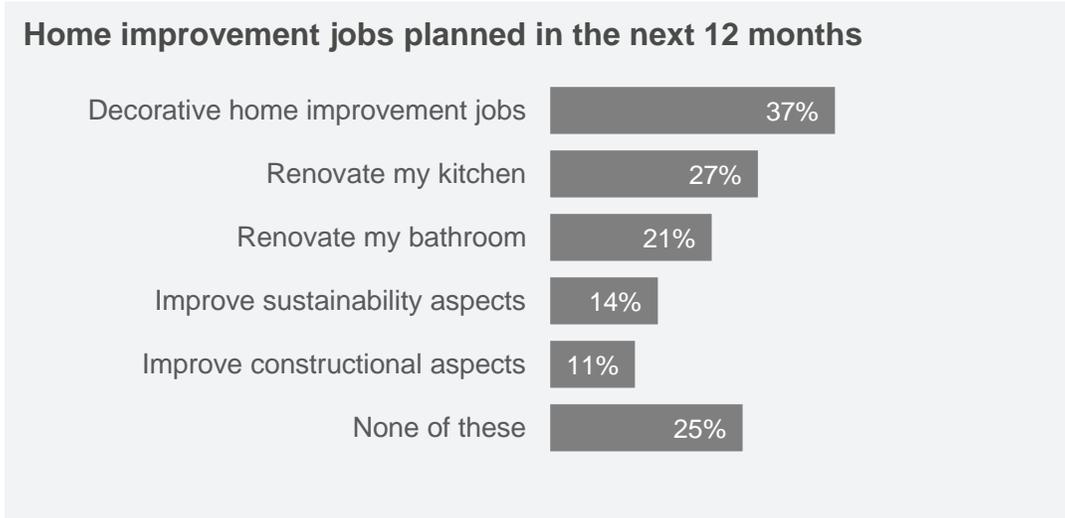
DIY vs DIFM development over years

DIY
DIFM



POLAND

Almost 4 in 10 Polish expect to do decorative home improvement jobs in the coming 12 months.



POLAND

Offered services of the biggest 4 DIY stores in the country:

In black is offered, in grey is not offered (based on information on the website of the DIY retailers)

castorama

Installation of bought products

Planning

Machine borrowing/Rental service

Vehicle rental service

Tool service and maintenance

LEROY MERLIN

Installation of bought products

Planning

Machine borrowing/Rental service

Vehicle rental service

Tool service and maintenanceGRUPA
psb
MRÓWKA

Installation of bought products

Planning

Machine borrowing/Rental service

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Tool service and maintenance

OBI

Installation of bought products

Planning**Machine borrowing/Rental service**

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AVAILABLE PRODUCT CATEGORIES



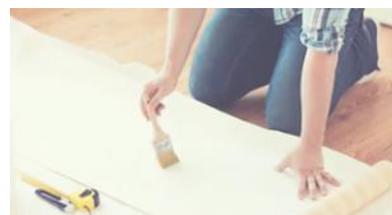
FLOORS



PAINT SUPPLIES



PAINT



WALLPAPER



PLASTER BOARD



INSULATION



POWER TOOLS



GARDEN TOOLS



DOORS/WINDOWS



FILLERS/MORTARS



BATHROOM



KITCHEN



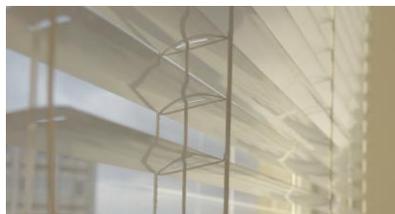
SAFETY & SECURITY



TILES & TILE GROUTS



ADHESIVE/SEALANT



WINDOW DECO



ROOF WINDOWS



LIGHTING



SMART HOME



HVAC

SPECIFIC QUESTIONS INCLUDED IN EHIM ON...



Q1 Orientation

- Did you get information about the paint online?
- Did you make your brand selection in the shop or had you already made your brand selection before going to the shop?
- Who determined the choice of type of product?
- Who determined the choice of type of brand?

Q3 Branding

- Which of the following brands for Paint have you ever heard of?
- How would you rate the following paint brands in general?
- Can you tell for the following statements how well it applies to the brand(s)?
[This brand has the best quality of products / This brand offers the best overall value for money / This is a brand that I trust / The products from this brand are easy to use]
- [if purchased in the past 6 months] What brand did you buy?

EXAMPLE OF THE QUESTIONS ASKED ABOUT A PRODUCT IN THE MONITOR

These questions are being asked on a monthly base for 100+ different products and reported per quarter to subscribers of the European Home Improvement Monitor

Q2 Purchase channels

- Did you purchase the paint yourself or did a professional purchased it?
- Where did you buy the paint?
- Did you order any of the products online?
- What was the name of the online shop where you purchased the paint?
- How much was spent in total on the paint?

Q4 DIY vs. DIFM

- Did you apply the paint yourself or did a professional applied it?
- How was the paint applied inside / outside the house?
- What type of paint was used inside / outside the house?
- Which percentage of the wall paint / lacquer that you have purchased for the inside / outside of the house was white, coloured (with/without tinting machine)
- What type of paint supplies were used?

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USP

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 6,282 interviews

3rd chapter – Incidence rate (number of home improvement jobs) is based on 2,400 per country; Theme questions on approx. 400 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+
51%	49%	BELGIUM	30%	35%	35%
48%	52%	FRANCE	26%	36%	37%
48%	52%	GERMANY	25%	35%	39%
48%	52%	ITALY	26%	35%	39%
45%	55%	NL	27%	34%	40%
50%	50%	POLAND	35%	37%	28%
55%	45%	SPAIN	30%	38%	32%
49%	51%	U.K.	29%	36%	36%
50%	50%	DENMARK	24%	32%	44%
52%	48%	AUSTRIA	35%	36%	29%
49%	51%	SWEDEN	32%	31%	38%

Weighting factor

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

Methodology

INCLUDED CATEGORIES

General home improvement figures are based on **107 selected products**:

1 "BATH"	19 "FREEZER (FREE-STANDING)"	37 "DORMER WINDOW"	55 "RAIN WATERPIPE"	73 "DRYWALL"	91 "PLUMBING MATERIALS"
2 "BATHROOM FURNITURE"	20 "COOKER SURFACE (BUILT-IN)"	38 "ROOF WINDOWS"	56 "GUTTER"	74 "WOOD AND BOARD MATERIAL"	92 "TILE GROUT"
3 "SHOWER ENCLOSURES"	21 "COOKER (FREE-STANDING)"	39 "STAIRS STAIR COVERING"	57 "BOILER"	75 "INSULATION MATERIAL"	93 "FILLERS"
4 "SHOWER SET / SHOWER HEAD"	22 "FAUCET"	40 "STAIRS BANNISTER"	58 "FUSE BOX/ELECTRICAL PANEL"	76 "STUCCO"	94 "TAPES"
5 "SHOWERTRAY"	23 "(COMBI-) MICROWAVE (BUILT-IN)"	41 "WC WASH BASIN"	59 "VENTILATION"	77 "PAINT"	95 "SANDPAPER"
6 "TAPS & MIXERS"	24 "(COMBI-) MICROWAVE (FREE-STANDING)"	42 "WC TAPS & MIXERS"	60 "AIRCONDITIONING"	78 "LIGHTING"	96 "BRUSH"
7 "TOILET"	25 "OVEN (BUILT-IN)"	43 "WC TOILET"	61 "ELECTRICAL VEHICLE CHARGING POINTS"	79 "TILE ADHESIVE"	97 "ROLLER"
8 "WASH BASIN"	26 "OVEN (FREE-STANDING)"	44 "BRICK"	62 "THERMOSTAT"	80 "FLOOR"	98 "PAINT SPRAY MACHINE"
9 "WHIRLPOOL"	27 "SINK"	45 "CEMENT"	63 "HOME AUTOMATION CONTROL PANEL"	81 "RADIATOR"	99 "PRESSURE WASHER"
10 "SHOWER DRAIN"	28 "STEAM OVEN (BUILT-IN)"	46 "ROOFING TILES"	64 "SMOKE ALARM OR FIRE ALARM"	82 "RADIANT HEATING"	100 "WET & DRY VACUUM CLEANER"
11 "HOOD VENT"	29 "STEAM OVEN (FREE-STANDING)"	47 "DOOR"	65 "ALARM INSTALLATION"	83 "SWITCH MATERIAL"	101 "STEAM CLEANER"
12 "KITCHEN COUNTERTOP"	30 "DISHWASHER (BUILT-IN)"	48 "ETICS"	66 "SECURITY CAMERA"	84 "SEALANTS"	102 "BLOW VAC"
13 "KITCHEN CABINETS"	31 "DISHWASHER (FREE-STANDING)"	49 "GLASS"	67 "HINGES"	85 "MORTARS"	103 "CHAIN SAW"
14 "REFRIGERATOR (BUILT-IN)"	32 "DECORATIVE MATERIALS"	50 "WINDOW CASING"	68 "LOCKS"	86 "WALLPAPER"	104 "ROBOTIC MOWER"
15 "REFRIGERATOR (FREE-STANDING)"	33 "DIVIDER"	51 "SOLAR PANELS"	69 "HAND TOOL"	87 "INTERIOR DOOR"	105 "WINDOW VACUUM CLEANER "
16 "REFRIGERATOR/FREEZER COMBINATION (BUILT-IN)"	34 "GARDEN FURNITURE"	52 "AWNINGS"	70 "ELECTRICAL TOOL"	88 "FURNITURE"	106 "PUMPS"
17 "REFRIGERATOR/FREEZER COMBINATION (FREE-STANDING)"	35 "GARDEN SHED / BARN"	53 "SKY LIGHT"	71 "GARDEN TOOL"	89 "WINDOW DECORATION"	107 "WATERING SYSTEM"
18 "FREEZER (BUILT-IN)"	36 "GARDEN PAVING"	54 "ASPHALT SHINGLE"	72 "GYPSUM BLOCKS"	90 "TILES"	

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