



European Home Improvement Monitor Q4 2022

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

A product by **USP** Marketing Consultancy

Preface

After two quarters of decline (Q2 and Q3), in which ... households were doing home improvement projects, we see a slight increase in the last quarter (Q4). About ... amount of European households was doing home improvement jobs compared to a year ago, but spending was ... by ... due to ... Considering the high inflation rates in Europe, this ... spending is still ... This is because ...

External factors such as the ...and ... still stimulate them to ... This trend towards more ... is now ongoing for already ...

This report not only looks at Do It Yourself (DIY) versus Do It For Me (DIFM). We also look closely at the planned and expected home improvement jobs that consumers will have in 2023. More on this can be found in the theme chapter, “DIY vs. DIFM.”



2022 IN-DEPTH TOPICS

Q1: Orientation

Rise of digital natives – new ways for inspiration & orientation on DIY products

Q2: Purchase channels

Mapping out the online leaders in home improvement

Q3: Branding

The future for name brands and private labels in home improvement

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

Drivers and barriers for doing or outsourcing home improvement jobs.

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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.

DIY continues to be popular also after the pandemic

Increasingly more consumers chose DIY in 2022

During the past four years, the share of DIY in home improvement jobs has been rising. The main reasons for this trend are:

1. ...
2. ...
3. ...

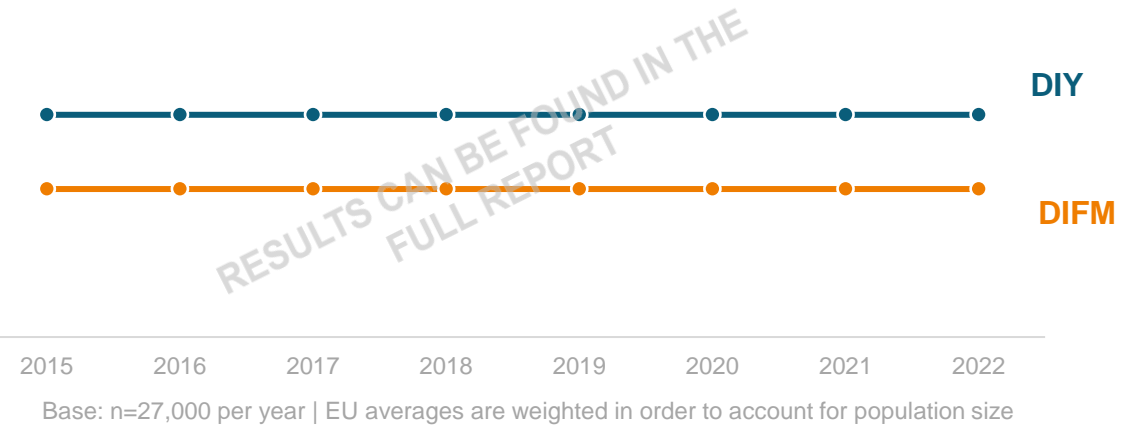
All three causes will continue to drive choosing DIY instead of DIFM in 2023.

The labour shortage...

The DIY skills gained by consumers during the pandemic will remain. And the prices are likely to...

For these reasons, we expected the share of DIY to be... in 2023.

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



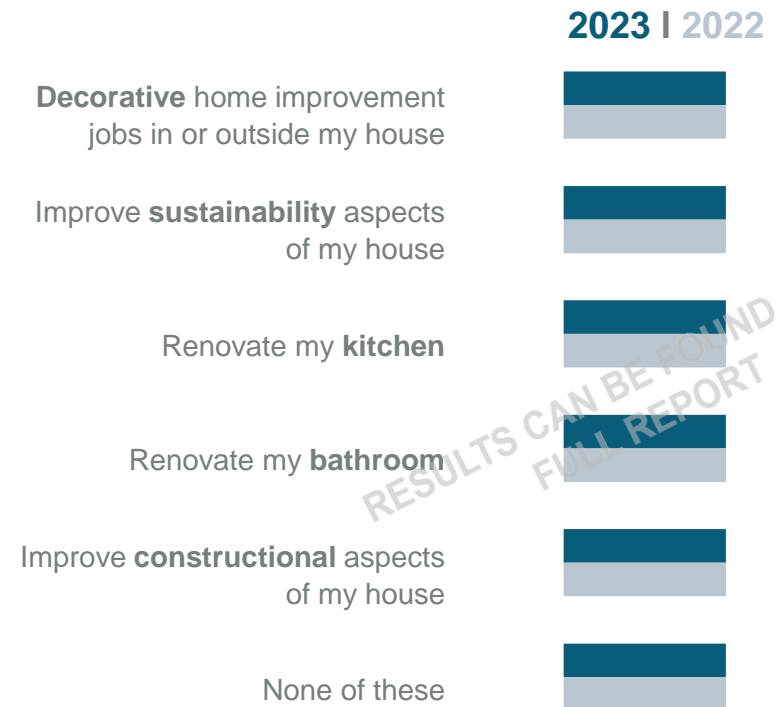
Plans for home improvement in 2023

The majority of European households have plans for home improvement projects this year. These are mainly... We also see the effect of the higher energy prices in Europe, however, as XX% of all households have plans to improve...

As plans are not always fulfilled, it is interesting to compare with prior expectations. When we asked consumers a year earlier about their plans for 2022, more European households had plans for home improvement. XX% of the households had no plans, compared to XX% this year.

Expected home improvement projects

Q: Which of the following type of home improvement projects do you expect to do within the next 12 months?



Future expectations on home improvement

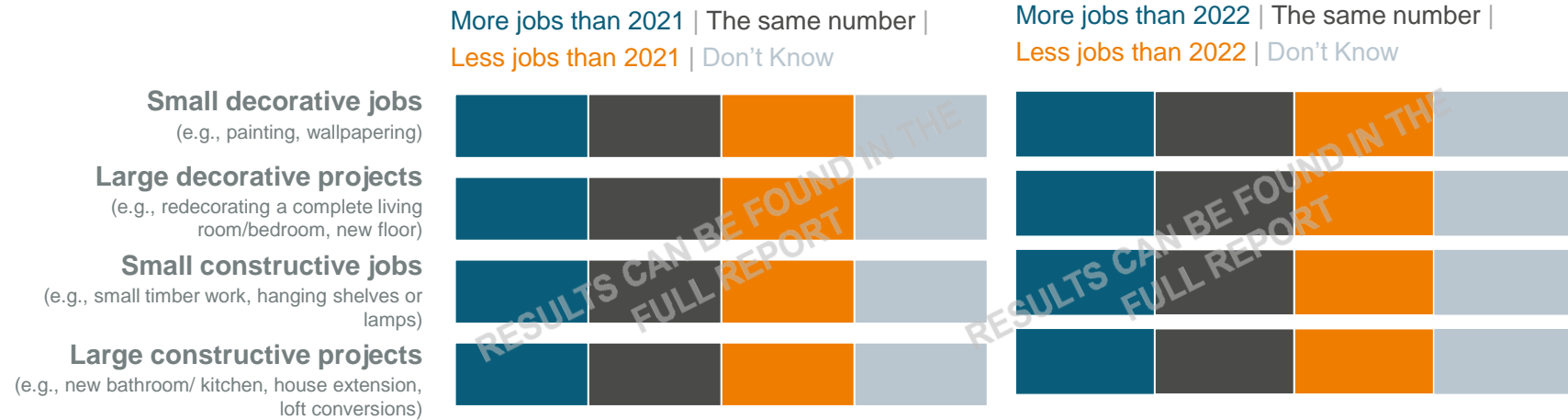
Consumers are not yet done with home improvement, as many of them indicate to have plans.

In contrast, consumers expect to spend more money this year than in 2022. This expected increase is caused by the price increases for products and materials that consumers are already experiencing.

Overall, expectations...

Home improvement jobs: 2022 vs 2023

Q: Looking forward to **this year**, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than in the **last year**?



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EUROPEAN DEVELOPMENTS

THEME: DIY VERSUS DIFM

EUROPEAN OVERVIEW

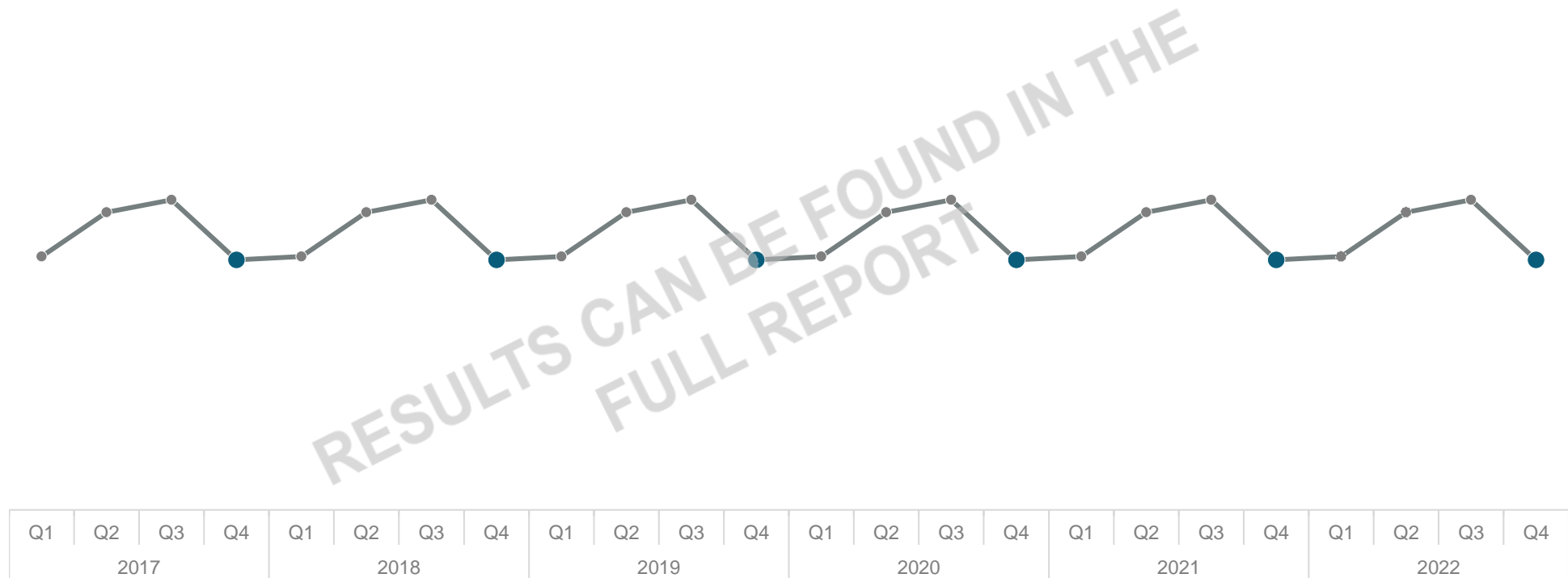
COUNTRY OVERVIEW

HOME IMPROVEMENT PER CATEGORY

APPENDIX



Share of households that have done a home improvement job* – 2022 Q4



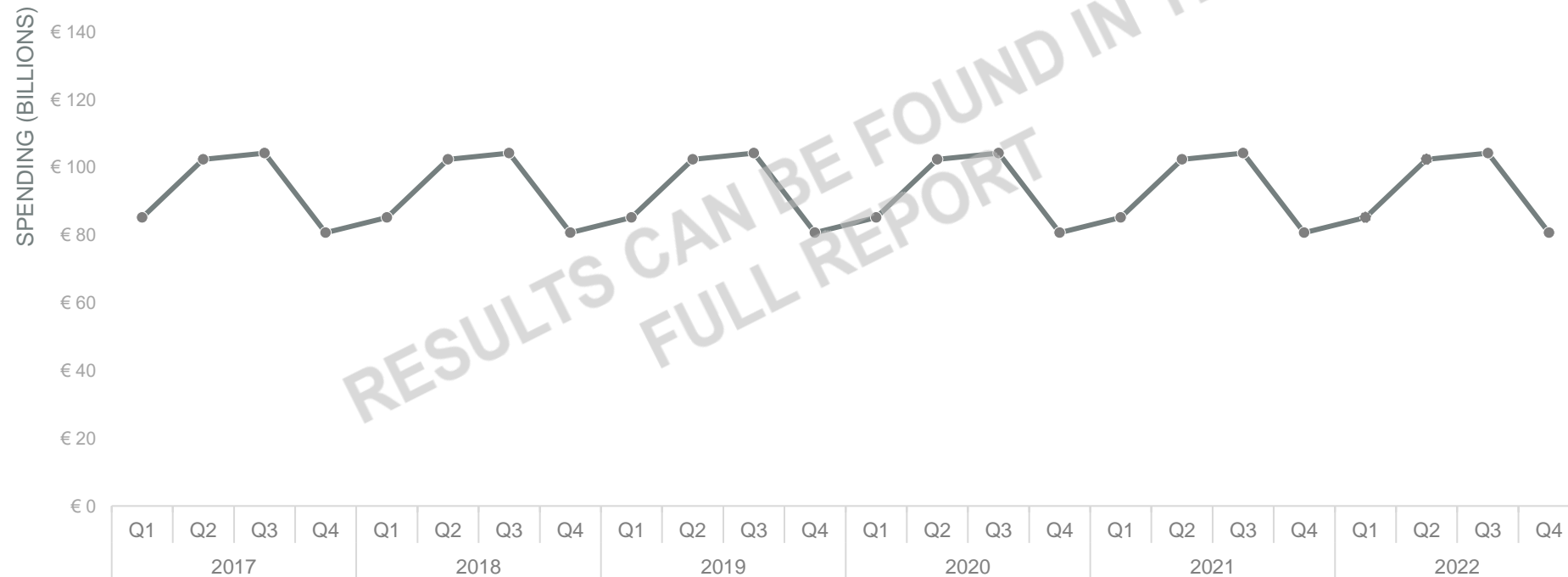
N = 6,600 interviews per quarter

*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 2022 compared to Q3 2022.

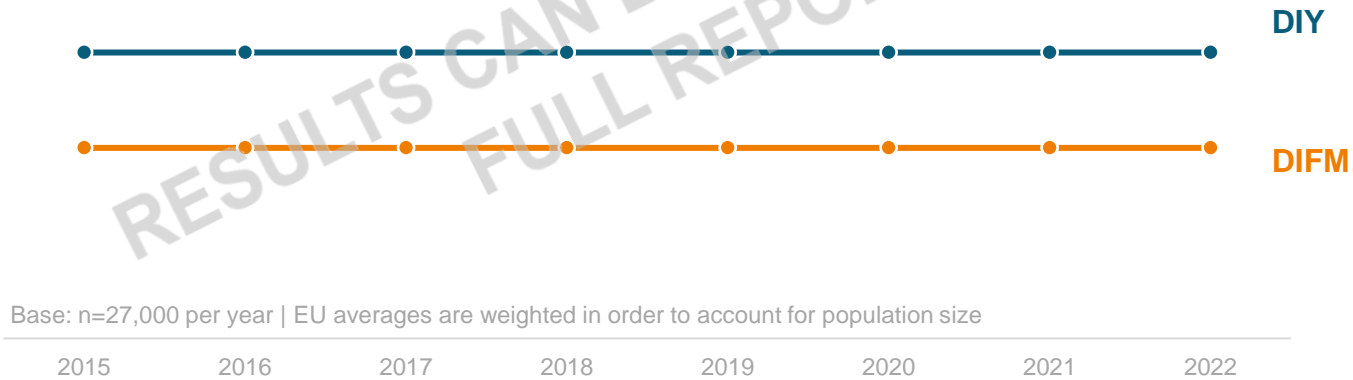
European spending on labour + material



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

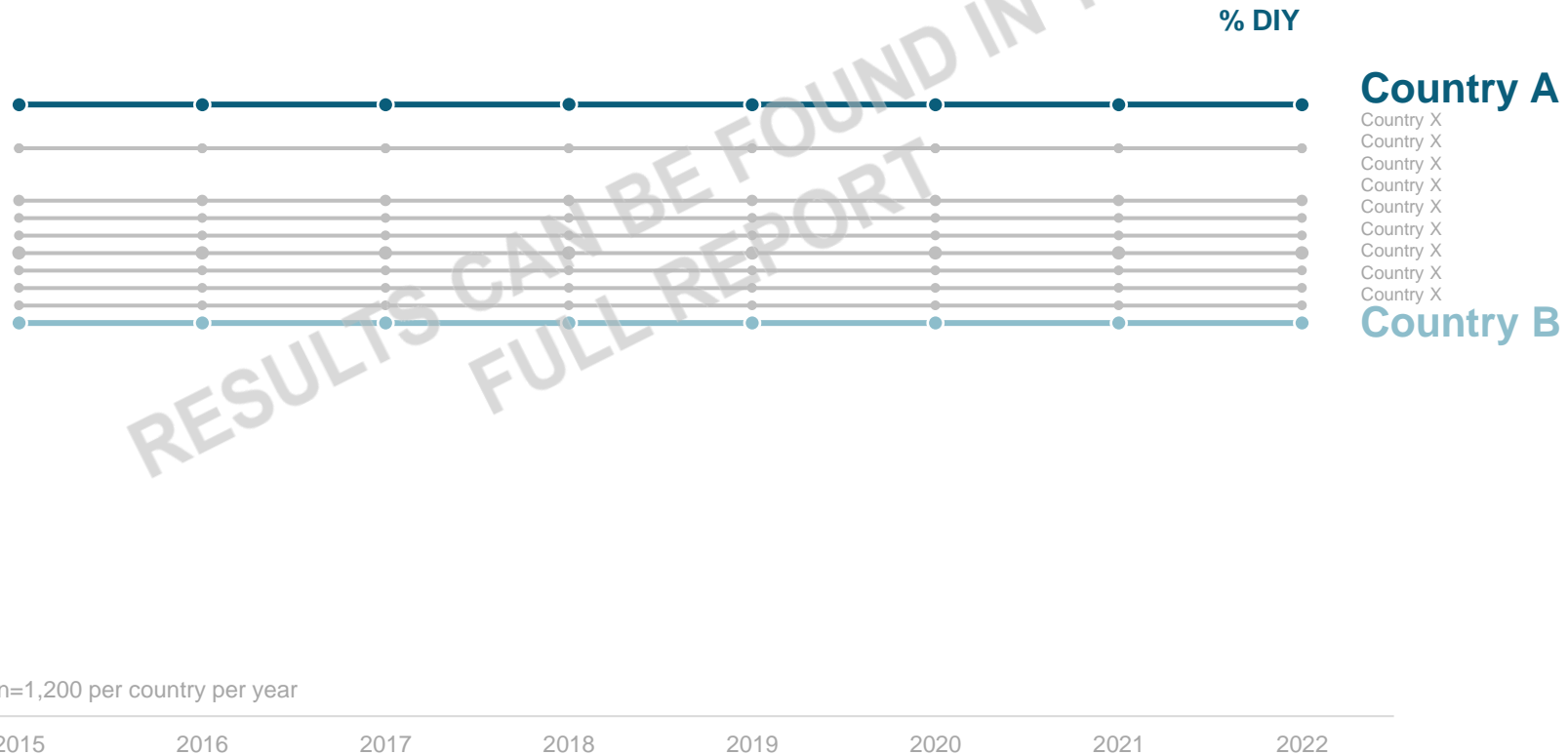
19 product categories are included:

- | | | | |
|-------------------|-------------------|--------------------------|---------------|
| 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 | |

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

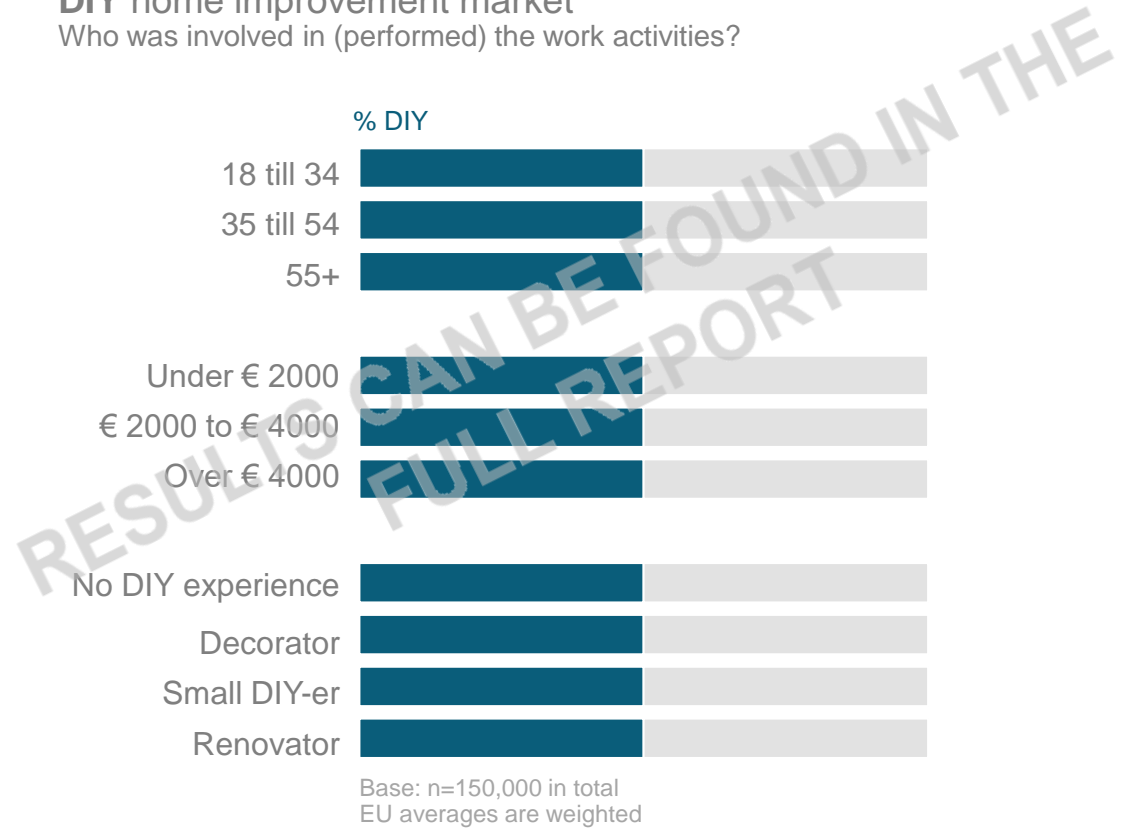
DIY home improvement market

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



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?



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Theme questions

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



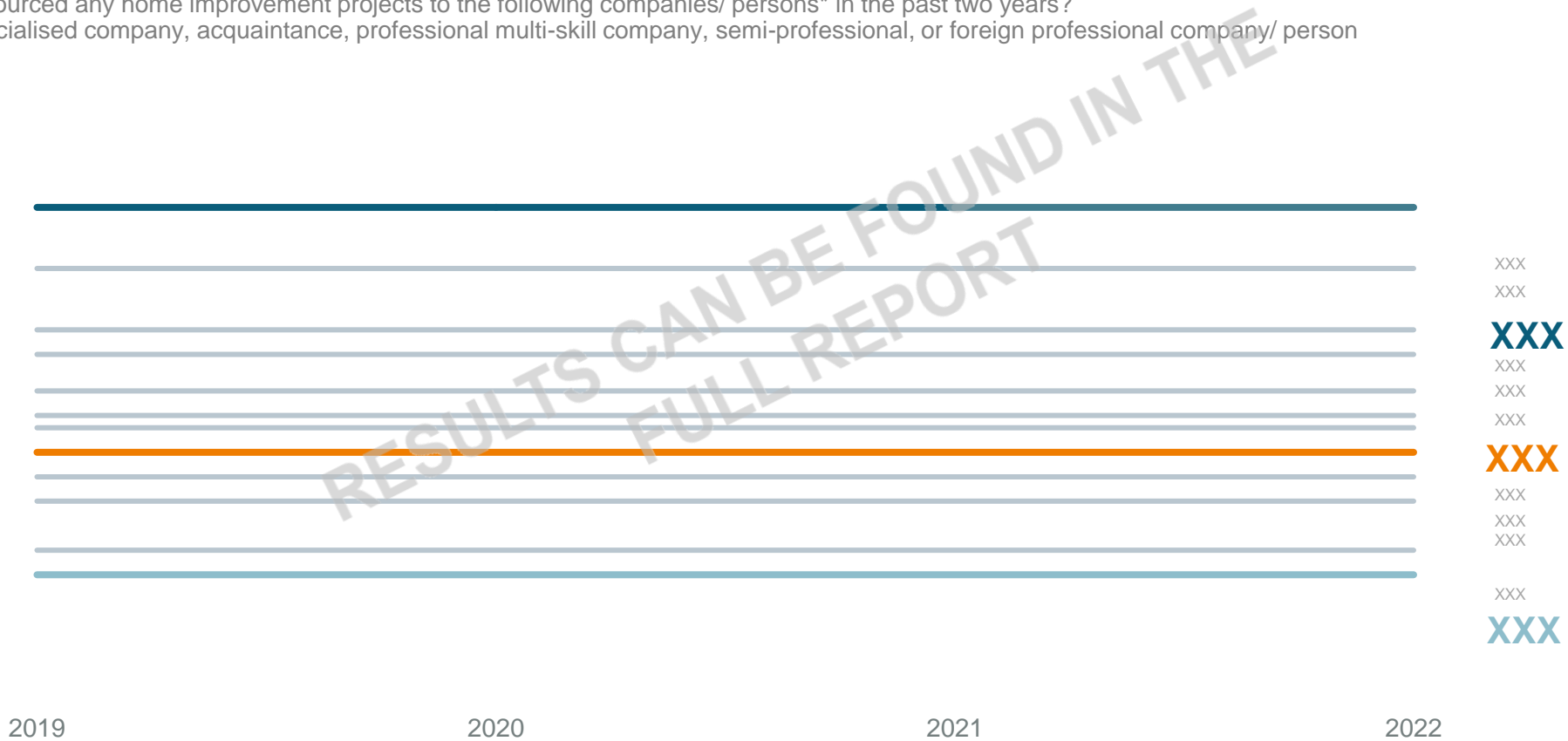
- Have you **outsourced** any home improvement projects in the past two years?
- When it comes to home improvement jobs and hiring professionals to do the job for you. What are your **expectations** for the next 2 years?
- Why do you expect to **hire a professional** for your home improvement jobs **more often** in the next two years?
- Why do you expect to **do home improvement jobs yourself more often** in the next two years?
- Which of the following **types of home improvement projects** do you expect to do within the next 12 months?
- Do you expect to do the **decorative jobs** yourself, your partner, or friends or outsource it to a professional?
- Do you expect to do the **constructional jobs** yourself, your partner, or friends or outsource it to a professional?
- **Looking back at 2022**, were the number of home improvement jobs in or outside your home more, the same, or less than in 2021?
- **Looking forward to 2023**, do you expect the number of home improvement jobs in or outside your home to be more, the same, or less than in 2022?
- To what degree do you expect to **spend more or less money** on home improvement in 2023 compared to 2022?
- If you purchase a **tap** and want it installed, what type of installation would you prefer?
- If you purchase a **laminated floor** and want to have it installed, what type of installation would you prefer?
- If you purchase a **safety camera** and want to have it installed, what type of installation would you prefer?
- What is your **most important barrier to hiring a professional** for your next planned home improvement jobs?
- What is your **most important barrier to doing home improvement jobs**?

The share of households that outsource one or more home improvement jobs has...

The share of households that have outsourced home improvement projects

Q: Have you outsourced any home improvement projects to the following companies/ persons* in the past two years?

*Professional specialised company, acquaintance, professional multi-skill company, semi-professional, or foreign professional company/ person

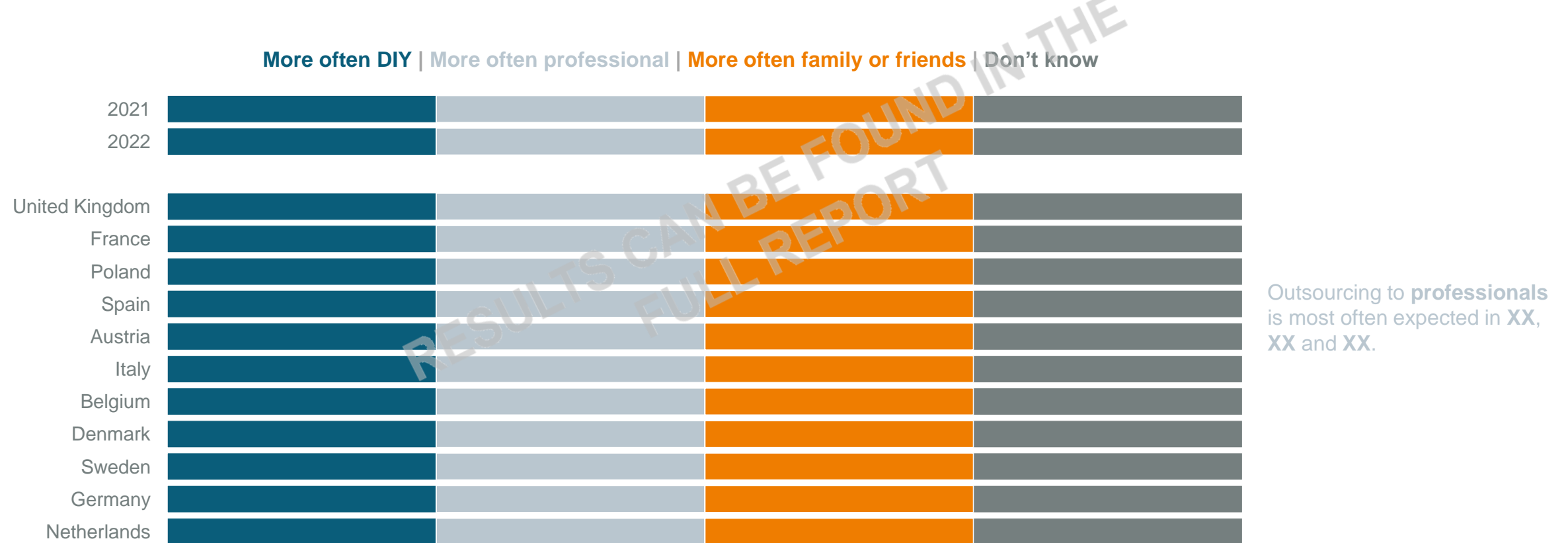


Base: n=6,608, all respondents

Approximately ... plan to do the home improvement jobs themselves, with DIY being most frequently expected in the ... and ...

Home improvement jobs in next 2 years

Q: 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?

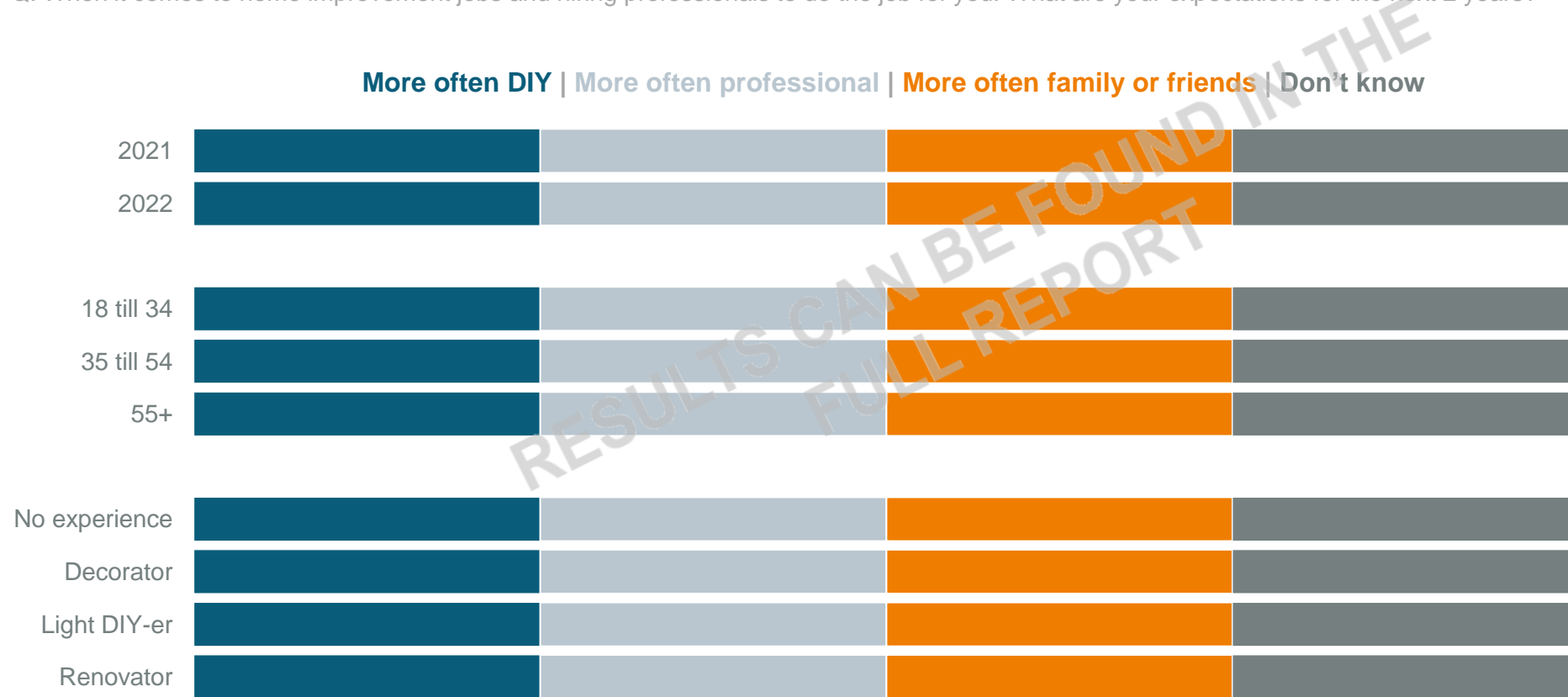


Base: n=6,608, all respondents

... and those with more ... more often plan to do the home improvement jobs ...

Home improvement jobs in next 2 years

Q: 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?

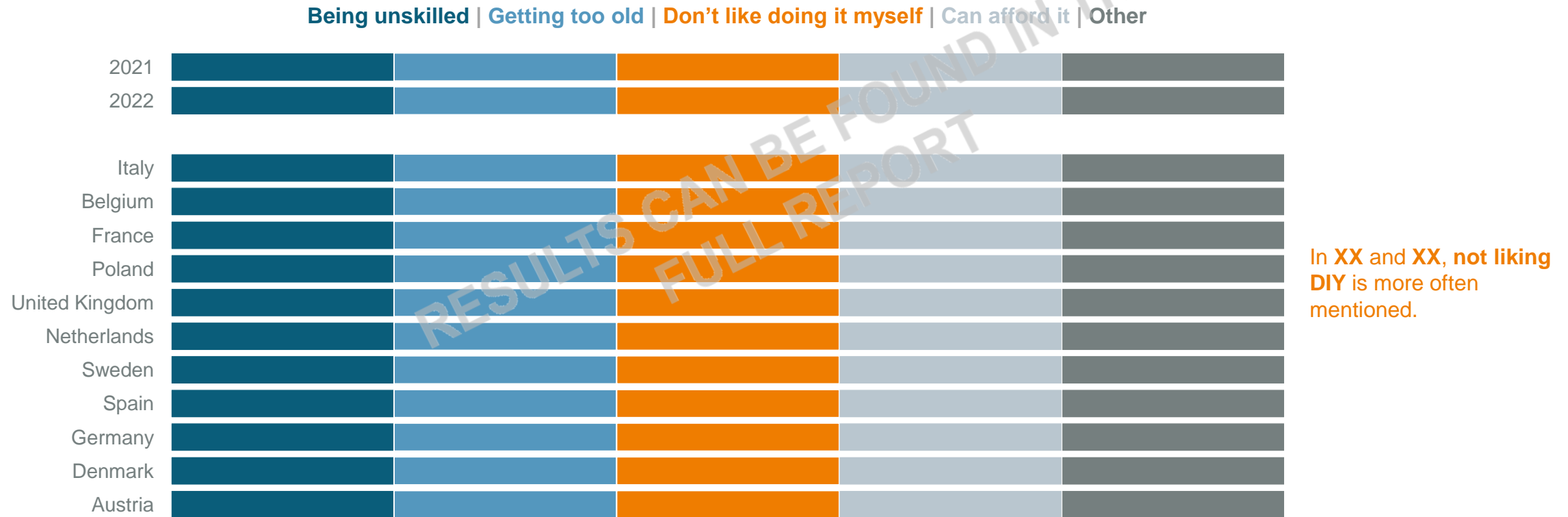


Base: n=6,608, all respondents

Slightly ... list ... as the biggest reason to ... in home improvement jobs in the next two years.

Hiring a professional in the next 2 years

Q: Why do you expect to hire a professional for your home improvement jobs more often in the next two years?

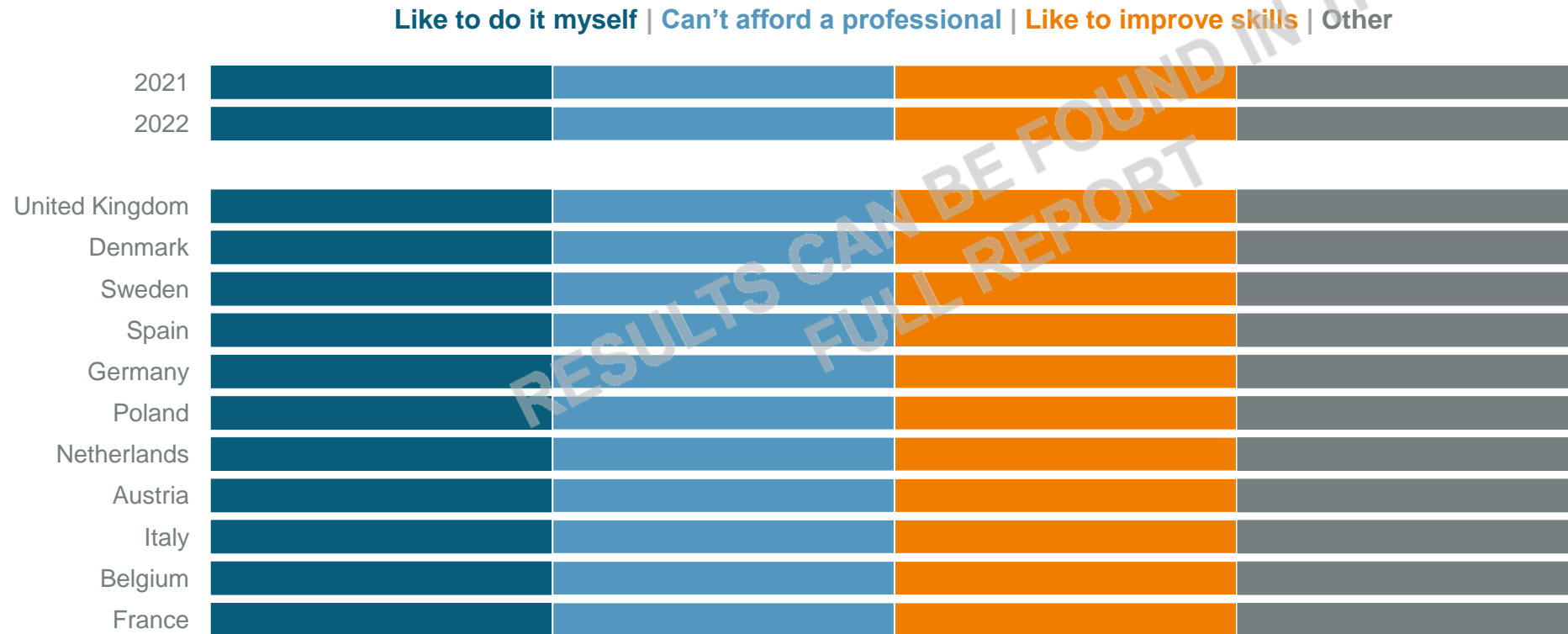


Base: n=1,650, plan to hire a professional for home improvement jobs in the next two years

Slightly ... than ... list their ... as the biggest reason for doing ... home improvement jobs ... in the next two years.

Doing home improvement yourself in the next 2 years

Q: Why do you expect to do home improvement jobs more often yourself in the next two years?



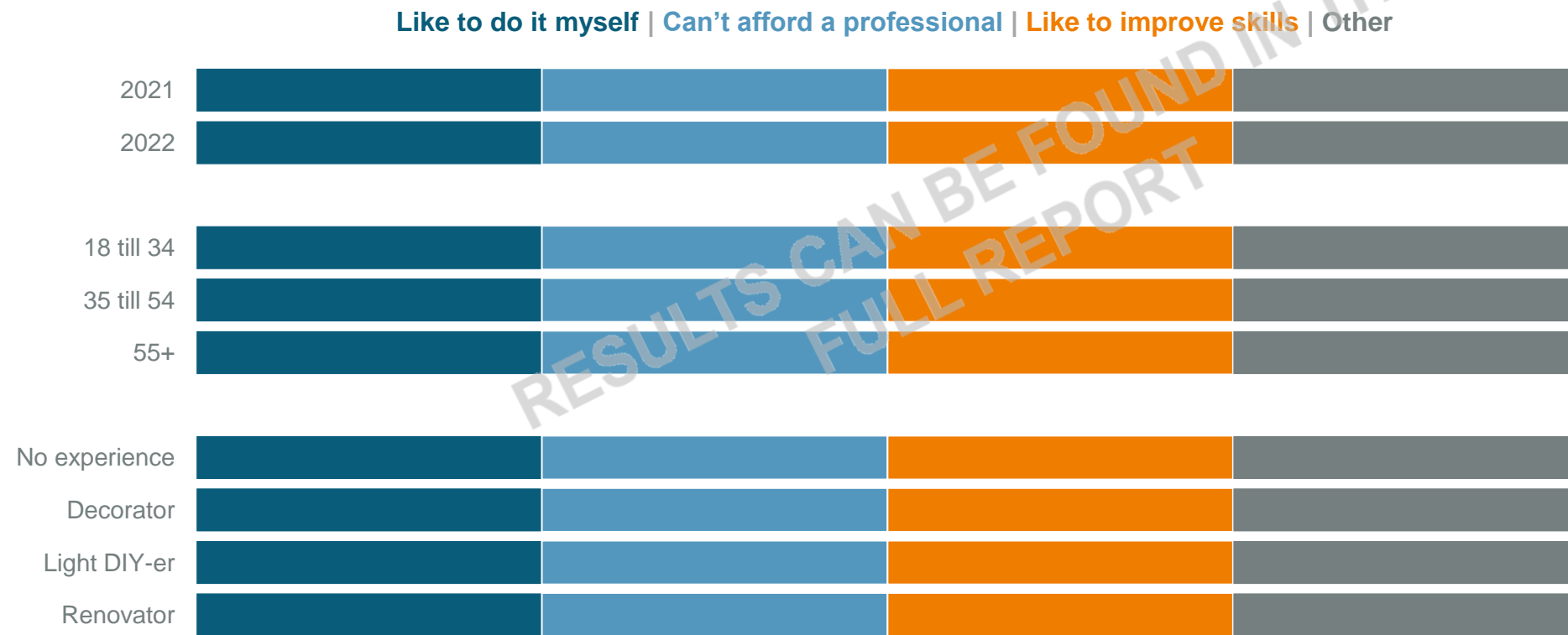
In XX, XX and XX, improving their skills is frequently mentioned as a reason for doing more DIY jobs.

Base: n=2,161, plan to do DIY projects themselves

The ... and those with ... often state ... as a reason for doing ... DIY jobs in the next years.

Doing home improvement yourself in the next 2 years

Q: Why do you expect to do home improvement jobs more often yourself in the next two years?



Base: n=2,161, plan to do DIY projects themselves

... are the most frequently mentioned home improvement projects for the next 12 months, with ... being mentioned often in ... and the ...

Expected home improvement projects

Q: Which of the following type of home improvement projects do you expect to do within the next 12 months?

	TOTAL	AT	BE	DK	FR	DE	IT	NL	PL	ES	SE	UK
N	6,608	599	598	601	603	600	603	600	599	601	602	602
Decorative home improvement jobs in- or outside my house		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Improve sustainability aspects of my house		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Renovate my kitchen		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Renovate my bathroom		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Improve constructional aspects of my house		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
None of these		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

Base: n=6,608, all respondents

... jobs ... is more common in ..., while ... is more frequent in ...

Planned home improvement jobs: DIY vs DIFM

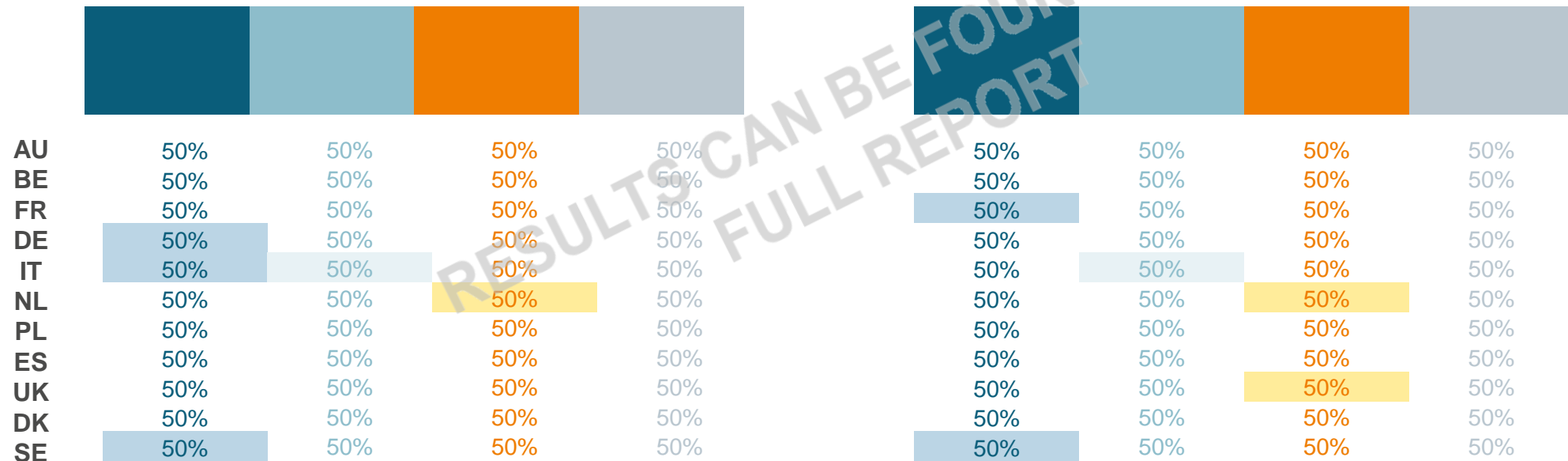
Do you expect to do the home improvement jobs yourself, your partner, friends or outsource it to a professional?

**Asked to consumers who plan to do the home improvement jobs in the next 12 months.*

Myself / my partner | Family / friends | A professional | Don't know

Decorative home improvement jobs

Constructional jobs



The expectation to do home improvement jobs in the future has ... compared to last year.

Home improvement jobs: 2022 vs 2021

Q: 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**?

More jobs than 2021 | Same | Less jobs than 2021 | DK



Home improvement jobs: 2023 vs 2022

Q: Looking forward to **2023**, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than in **2022**?

More jobs than 2022 | Same | Less jobs than 2022 | DK

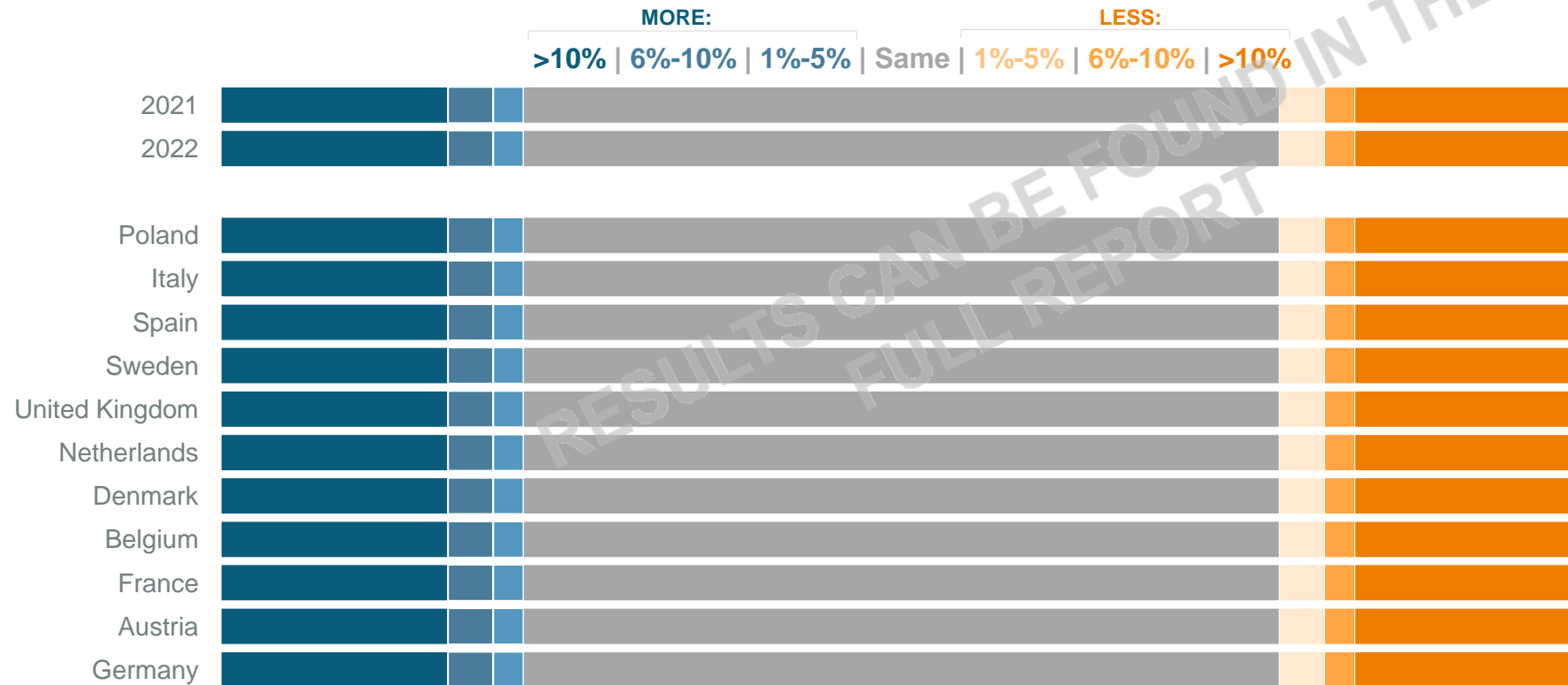


Base: n=6,608, all respondents

... spending on home improvement jobs is expected in 2023, with the biggest spending ... being expected in ...

Spending on improvement jobs in next year

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

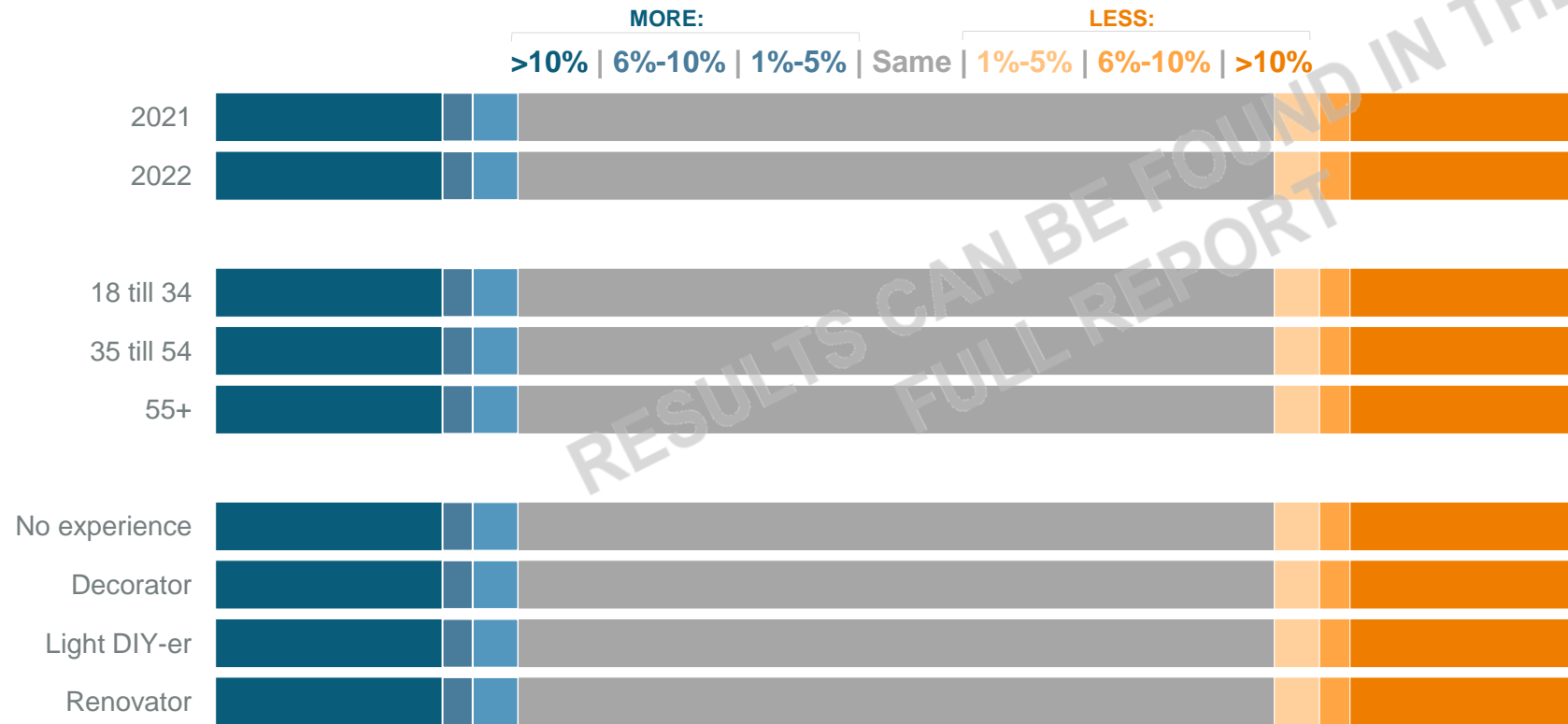


Base: n=6,608, all respondents

Especially ... expects to spend ... on home improvement jobs in the next year.

Spending on improvement jobs in next year

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

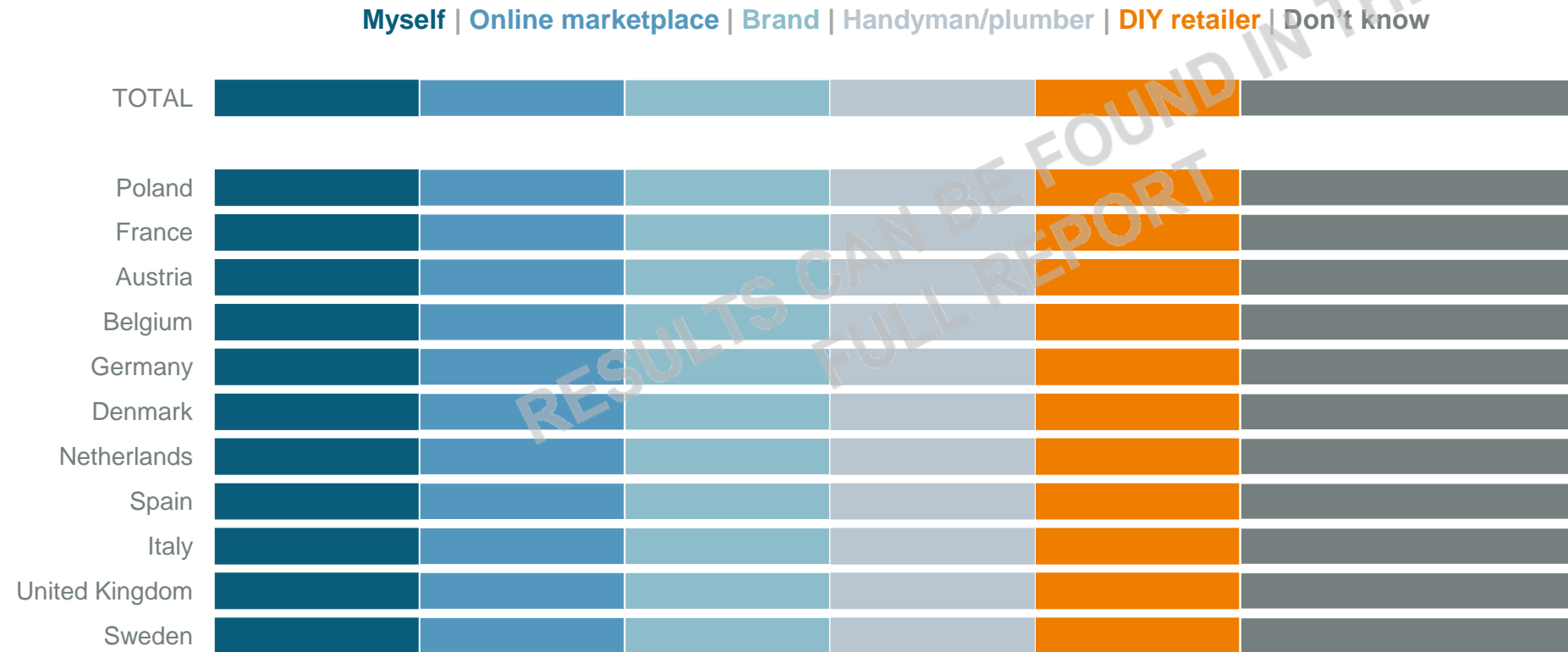


Base: n=6,608, all respondents

Around a ... would install a tap by themselves, with that method of installation being most often mentioned in ... and ...

Tap installation

Q: If you purchase a tap and want to have it installed, what type of installation would you prefer?



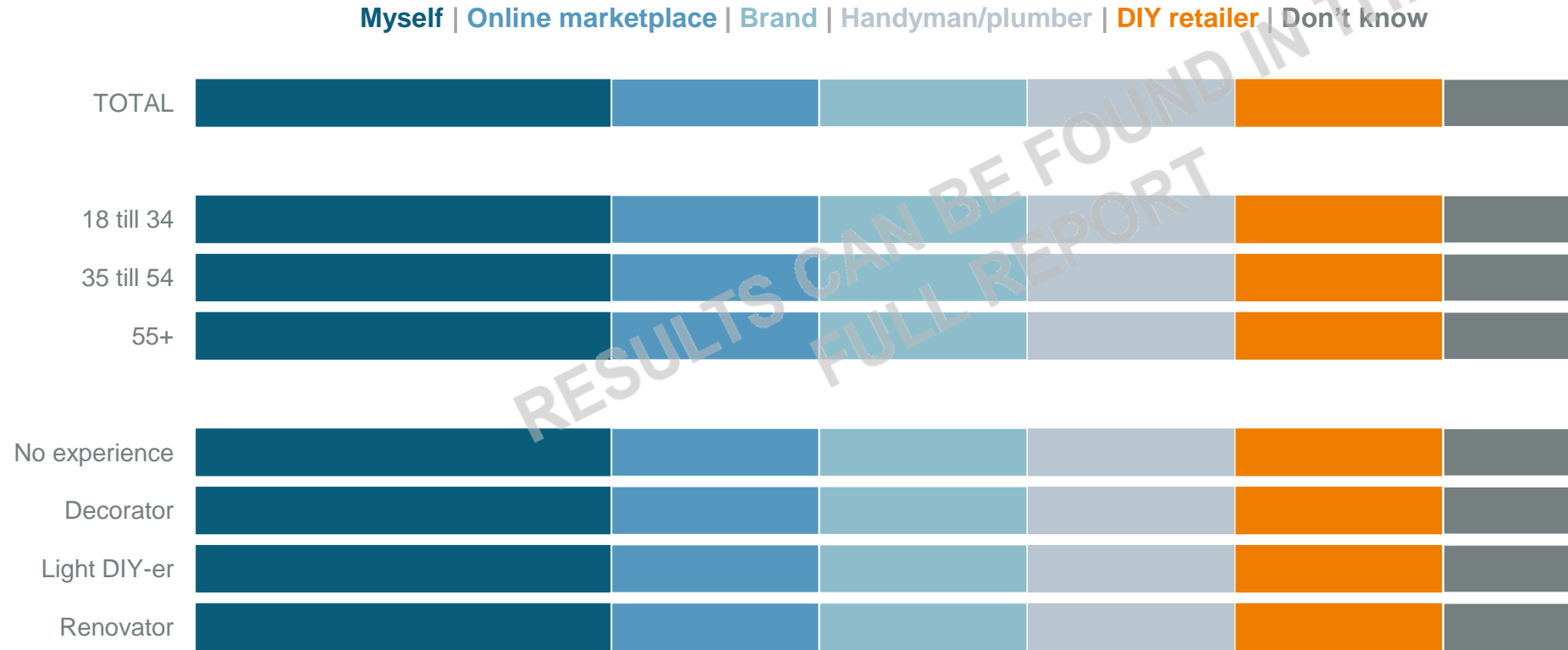
Outsourcing the installation jobs to **handymen/plumbers** is more often expected in the **XX, XX, XX and XX**.

Base: n=6,608, all respondents

The ... generations and people with ... often expect to install the taps ...

Tap installation

Q: If you purchase a tap and want to have it installed, what type of installation would you prefer?

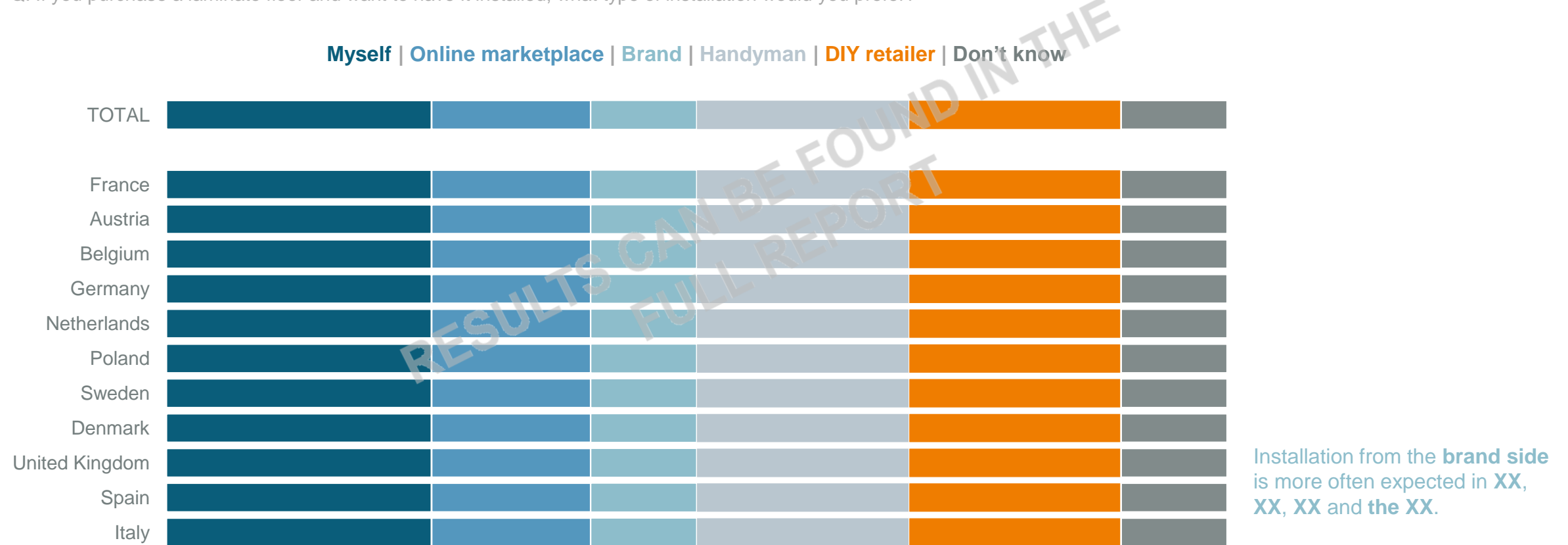


Base: n=6,608, all respondents

Around a ... of consumers would install laminate floors ..., with that method of installation being most often mentioned in ...

Laminate floor installation

Q: If you purchase a laminate floor and want to have it installed, what type of installation would you prefer?



Base: n=6,608, all respondents

The ... would prefer ... to install it, while the ... trust ... to do the job.

Laminate floor installation

Q: If you purchase a laminate floor and want to have it installed, what type of installation would you prefer?

Myself | Online marketplace | Brand | Handyman | **DIY retailer** | Don't know

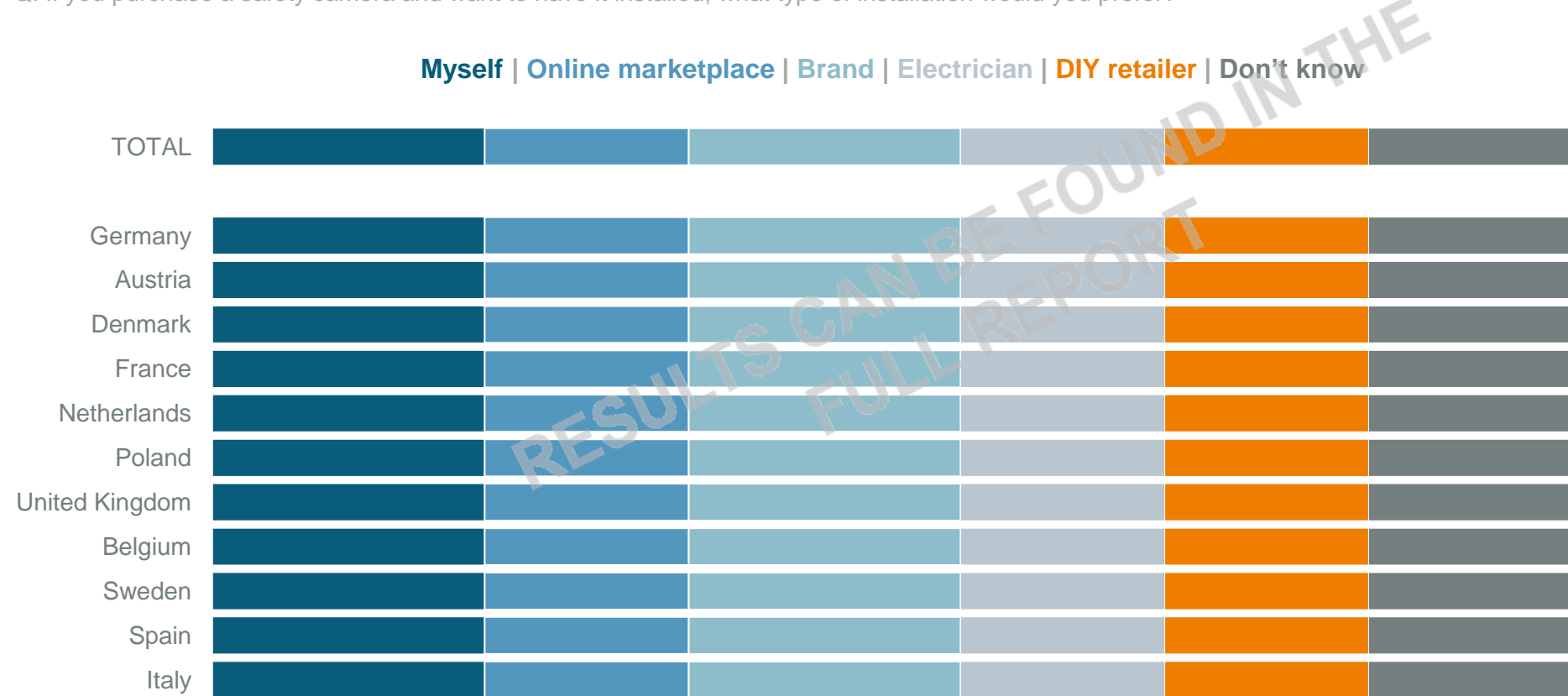


Base: n=6,608, all respondents

Around a ... would install safety cameras themselves.

Safety camera installation

Q: If you purchase a safety camera and want to have it installed, what type of installation would you prefer?



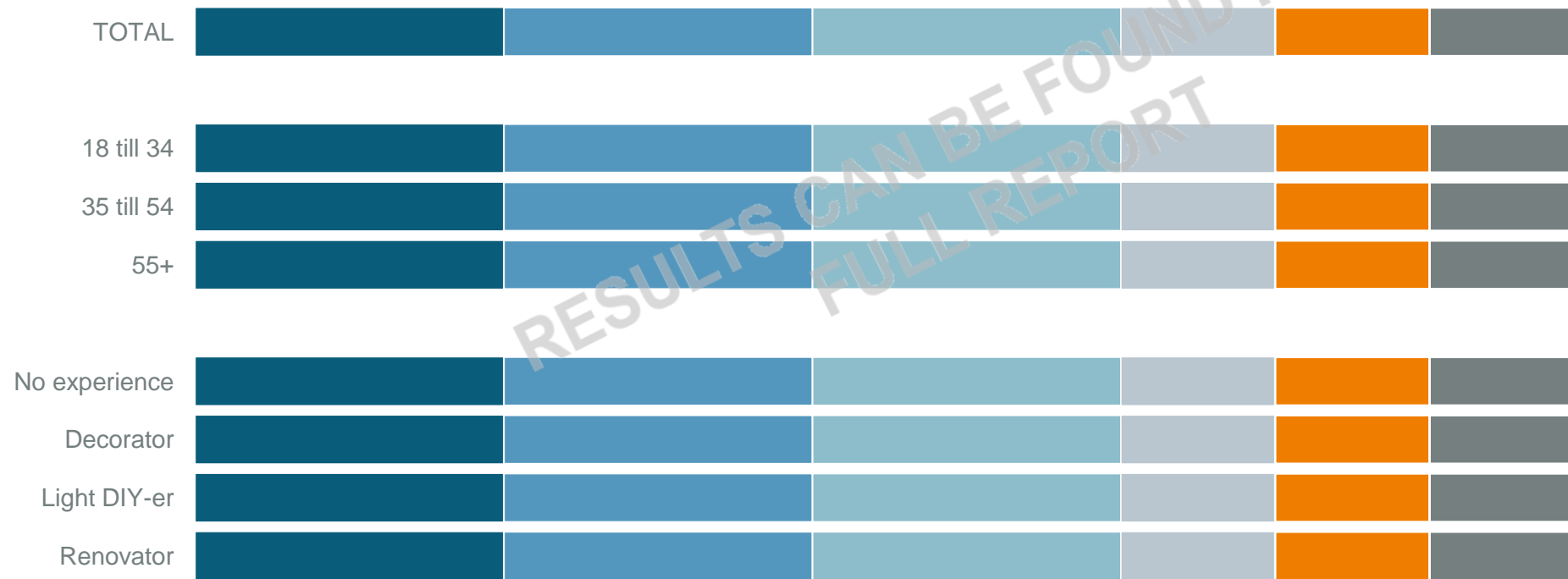
Base: n=6,608, all respondents

The ... would prefer ... to install it, while the ... trust ... to do the job.

Safety camera installation

Q: If you purchase a safety camera and want to have it installed, what type of installation would you prefer?

Myself | Online marketplace | Brand | Electrician | **DIY retailer** | Don't know



Base: n=6,608, all respondents

... and ... are the main barriers to for doing home improvement, with ... being mentioned more often in ..., and ... more often in ... and ...

Barriers to home improvement

Q: What is your most significant barrier to doing home improvement jobs?

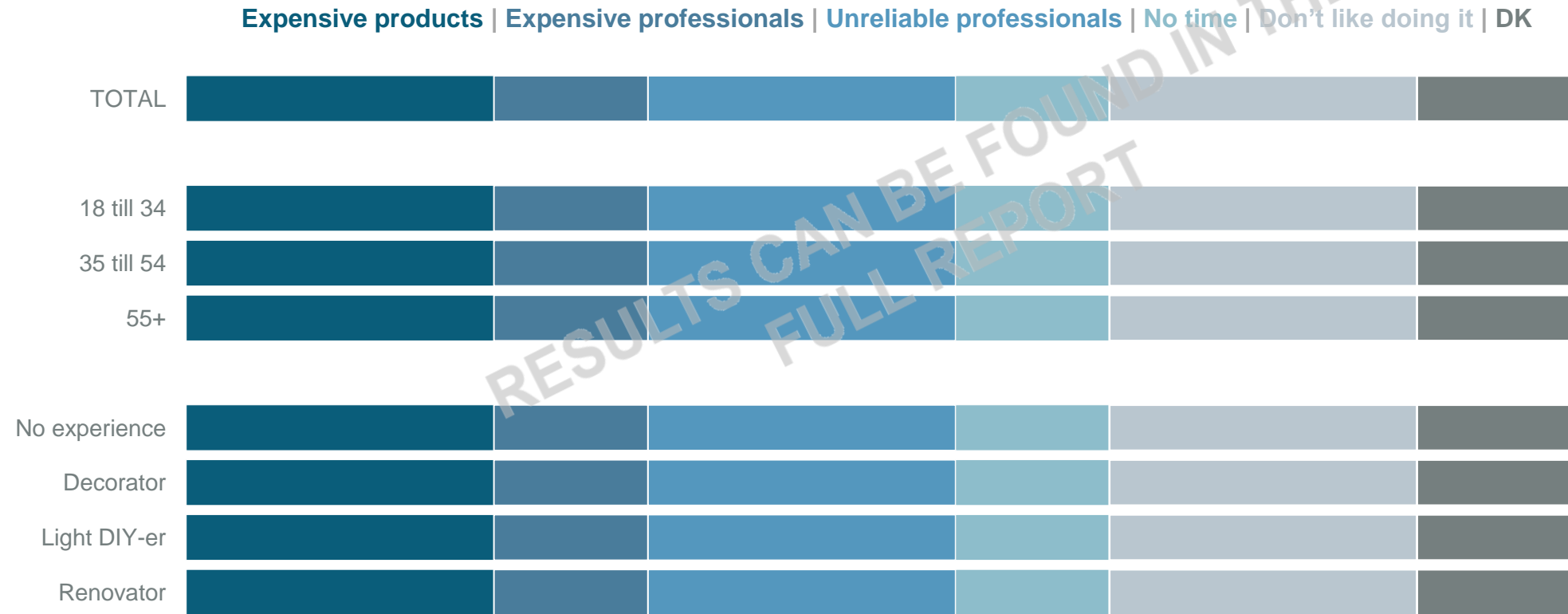


Base: n=6,608, all respondents

The ... more often states ... as an important barrier for doing home improvement jobs, while those with ... less often mention ...

Barriers to home improvement

Q: What is your most significant barrier to doing home improvement jobs?



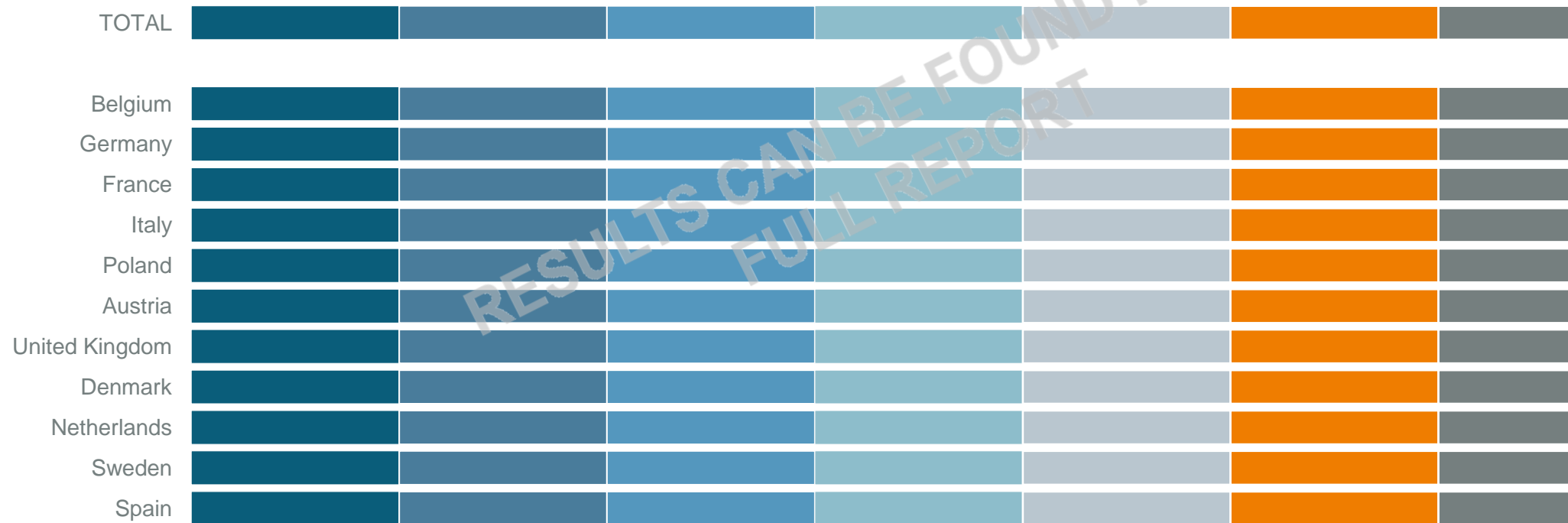
Base: n=6,608, all respondents

The main barrier for hiring professionals is ..., which is especially the case in ...

Barriers to hiring a professional

Q: What is your most important barrier to hiring a professional for your next planned home improvement jobs?

Too expensive | No professionals | Too small job | Unreliable professionals | Can do it myself | Like doing it myself | DK

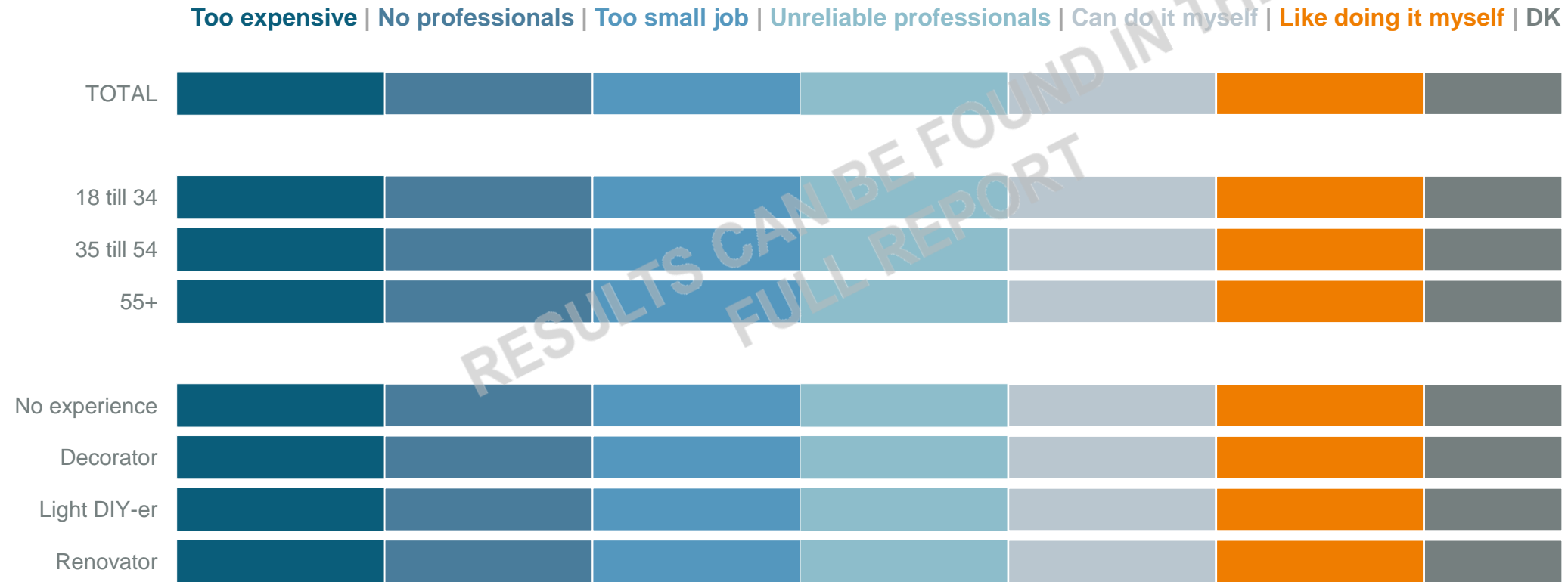


Base: n=6,608, all respondents

The ... people, the ... likely they are to mention ... as barriers to hiring ... in their home improvement projects.

Barriers to hiring a professional

Q: What is your most important barrier to hiring a professional for your next planned home improvement jobs?



Base: n=6,608, all respondents

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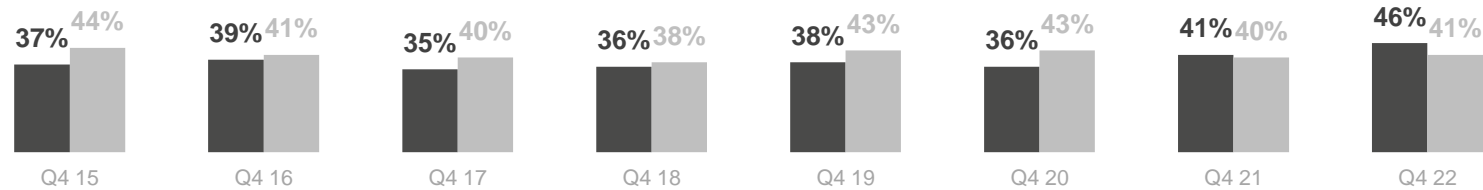
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AUSTRIA

Share of households that did a home improvement job

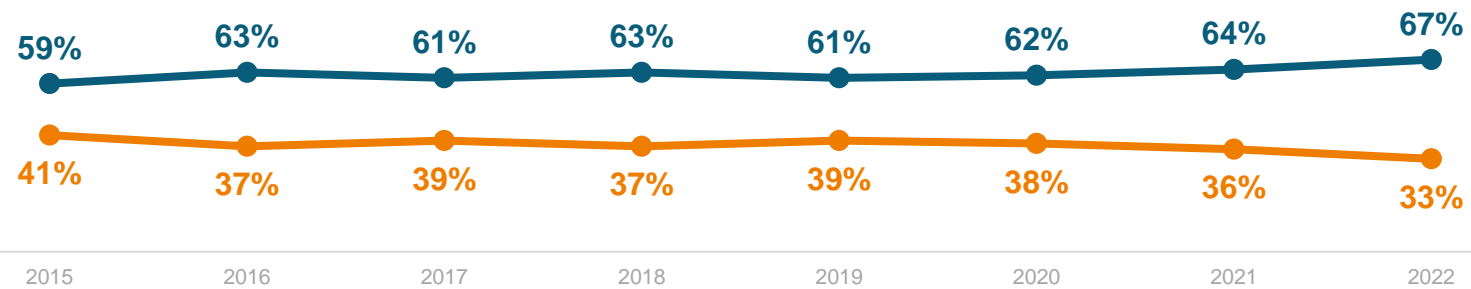
AUSTRIA
EU AVERAGE



Base: n=2,400 per year

DIY vs DIFM development over years

DIY
DIFM



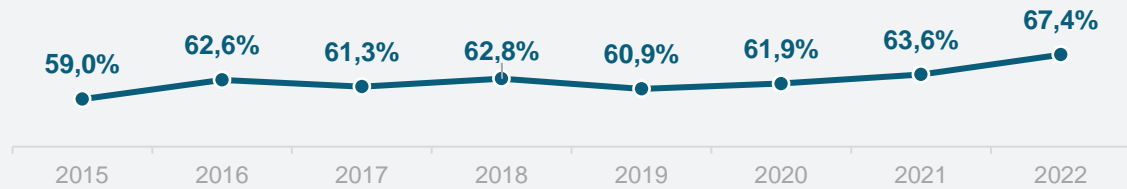
AUSTRIA

There has been a steady increase in the share of DIY projects over the years, with the older generation being more likely to hire a professional for a project.

DIY home improvement market

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

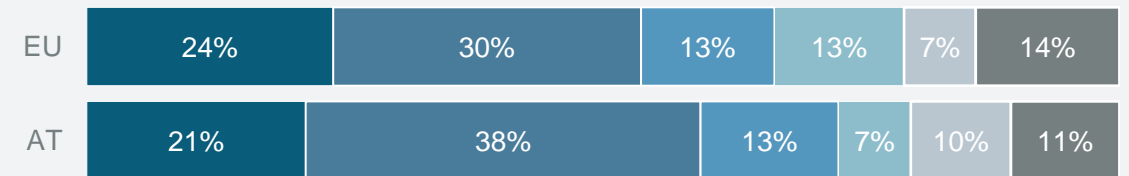
% DIY



Barriers to home improvement

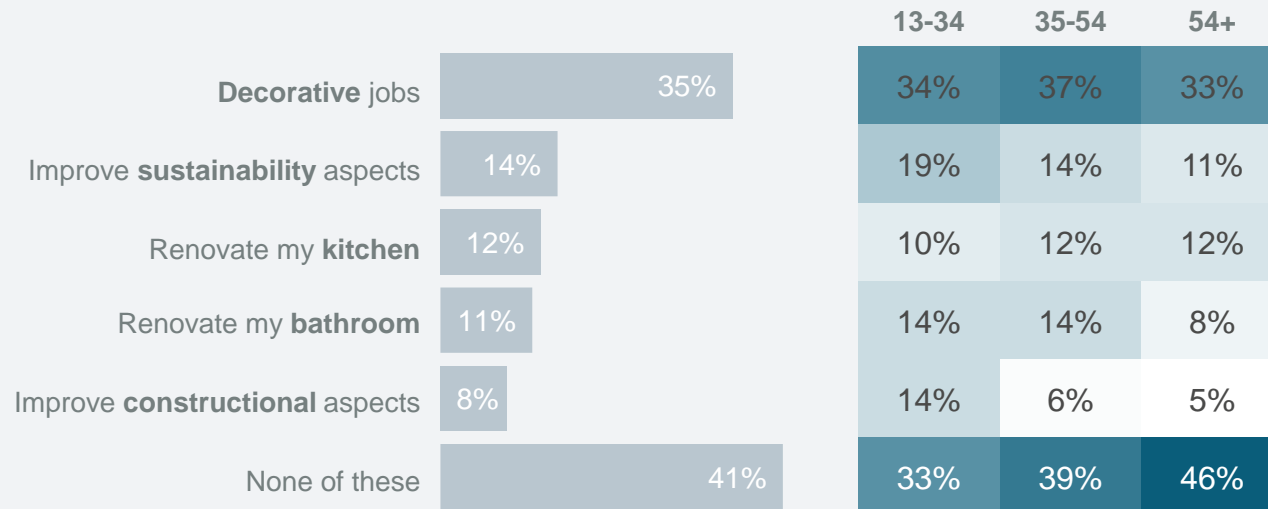
Q: What is your most significant barrier to doing home improvement jobs?

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



Expected home improvement projects

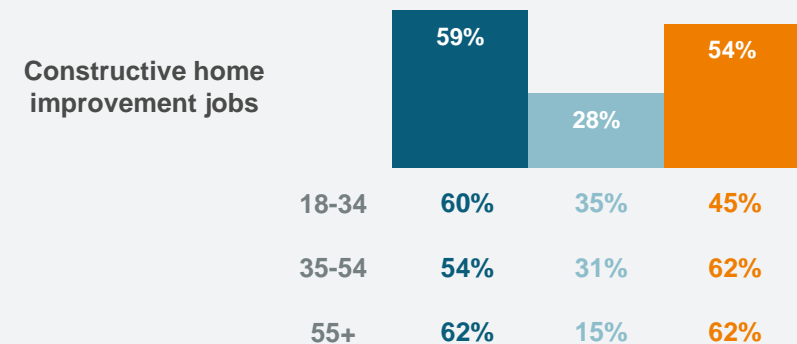
Q: Which of the following type of home improvement projects do you expect to do within the next 12 months?



Planned home improvement jobs: DIY vs DIFM

Do you expect to do the home improvement jobs yourself, your partner, friends or outsource it to a professional?

Myself/partner | Family/friends | Professional | DK



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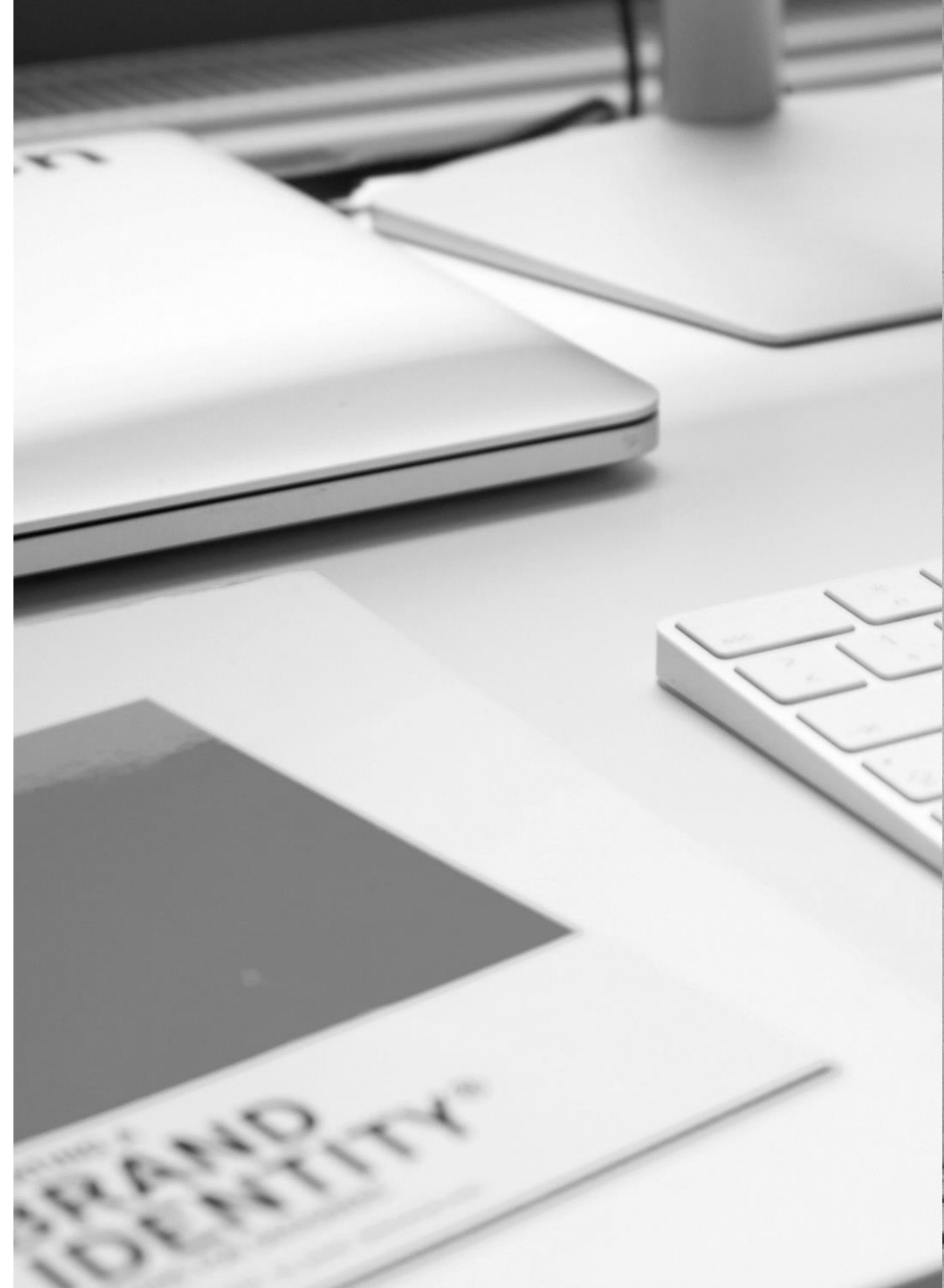
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AVAILABLE PRODUCT CATEGORIES



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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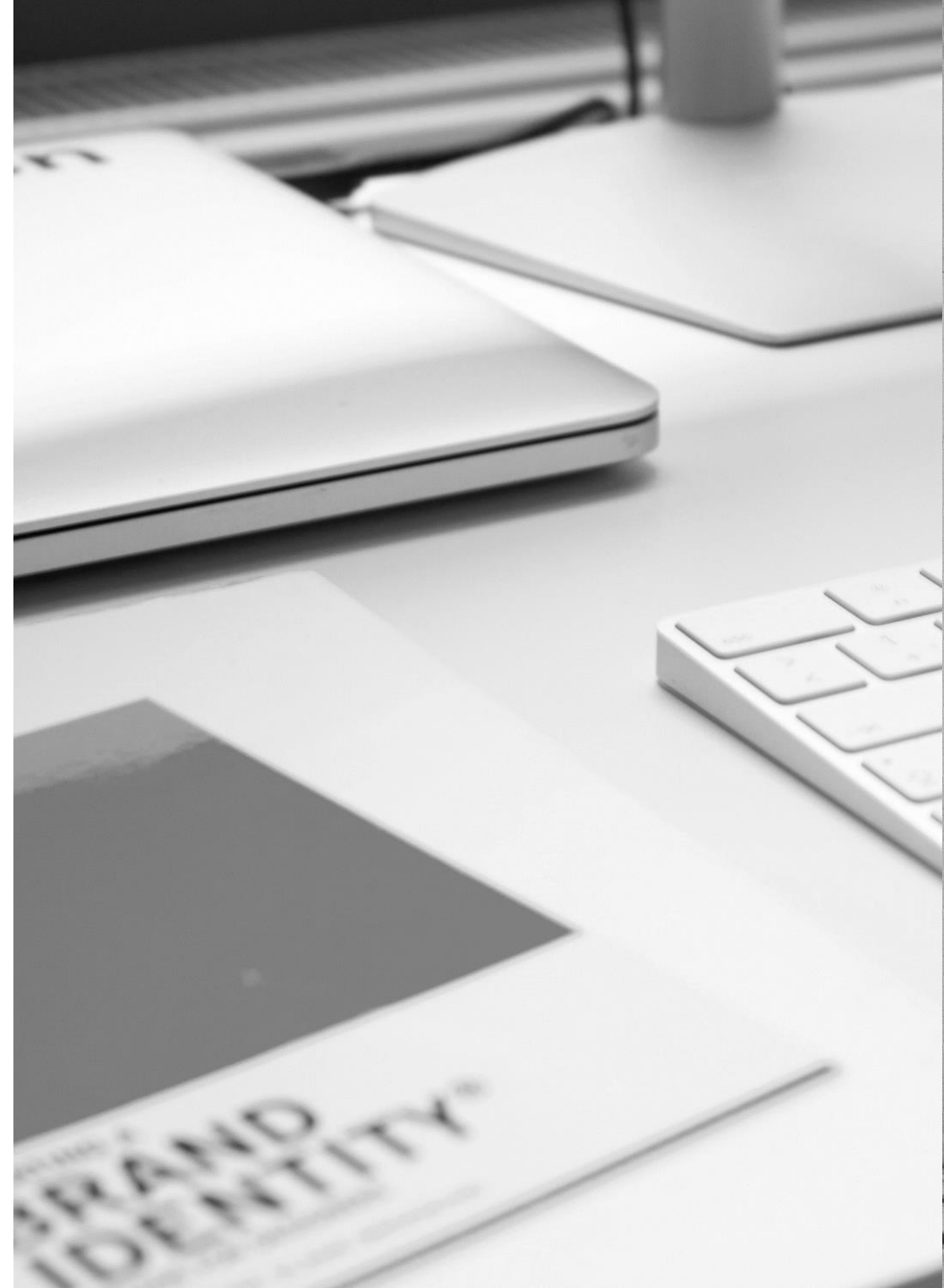
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Methodology

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+
52%	48%	Austria	24%	34%	42%
46%	54%	Belgium	27%	35%	37%
53%	47%	Denmark	18%	23%	59%
48%	52%	France	30%	37%	33%
46%	54%	Germany	30%	37%	33%
51%	49%	Italy	33%	35%	31%
50%	50%	Netherlands	30%	37%	33%
50%	50%	Poland	32%	36%	32%
50%	50%	Spain	32%	36%	31%
53%	47%	Sweden	29%	35%	35%
50%	50%	UK	31%	36%	33%

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
Sealants	Bath	Flooring products	Airconditioning	Fillers	Drill	Dormer windows	Locks
Tile adhesive	Bathroom furniture	Paint	Boiler (Central heating system)	Safety products (e.g., masks or respirators)	Electrical saw	Roof windows	Security camera
	Shower enclosures	Wallpaper	Ventilation	Sandpaper	Electrical screwdriver		Smoke alarm or fire alarm
	Shower set/ shower head	Window decoration		Tapes	Hammer drill		
	Shower tray				Sander		
	Taps & mixers						
	Toilet						
	Washbasin						
	Whirlpool						
	Shower drain (for tiled shower floor)						

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