



European Home Improvement Monitor Q4 2023
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 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 2023:

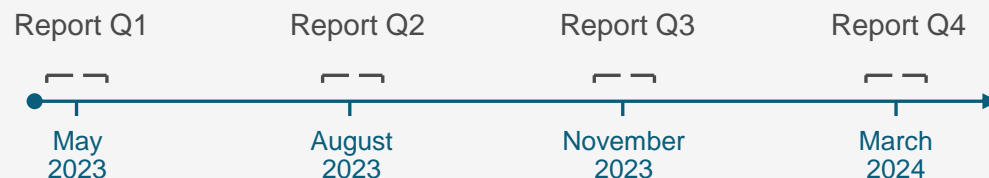
Q1: Orientation - Needs & willingness to invest in sustainability

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

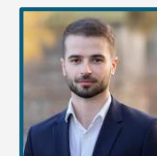


PROJECT TEAM



Reinier Zuydgeest

Managing Consultant
+31 6 2693 6109
Zuydgeest@usp-mc.nl



Luka Mandic

Project Manager
mandic@usp-mc.nl



Dirk Hoogenboom

Research Consultant
+31 6 5209 8924
Hoogenboom@usp-mc.nl

Index

Key insights

Economic developments

Theme: DIY vs. DIFM

European overview

Country overview

Home improvement per category

Appendix



Index

Key insights

Economic developments

Theme: DIY vs. DIFM

European overview

Country overview

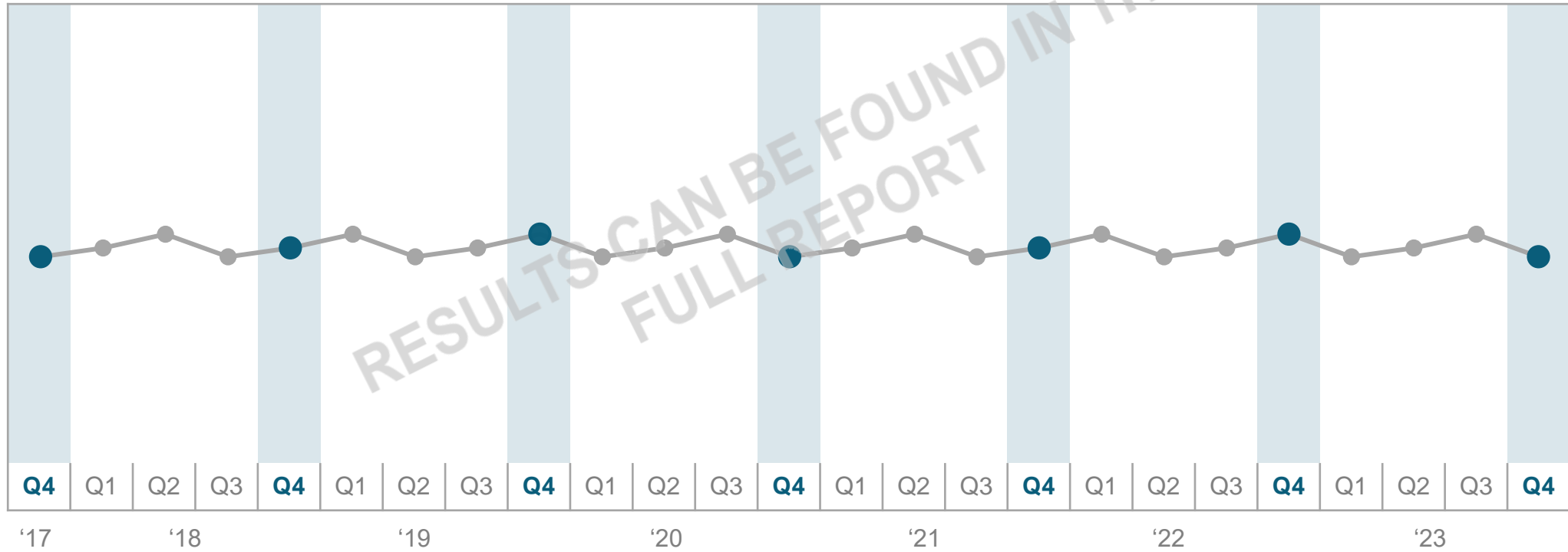
Home improvement per category

Appendix



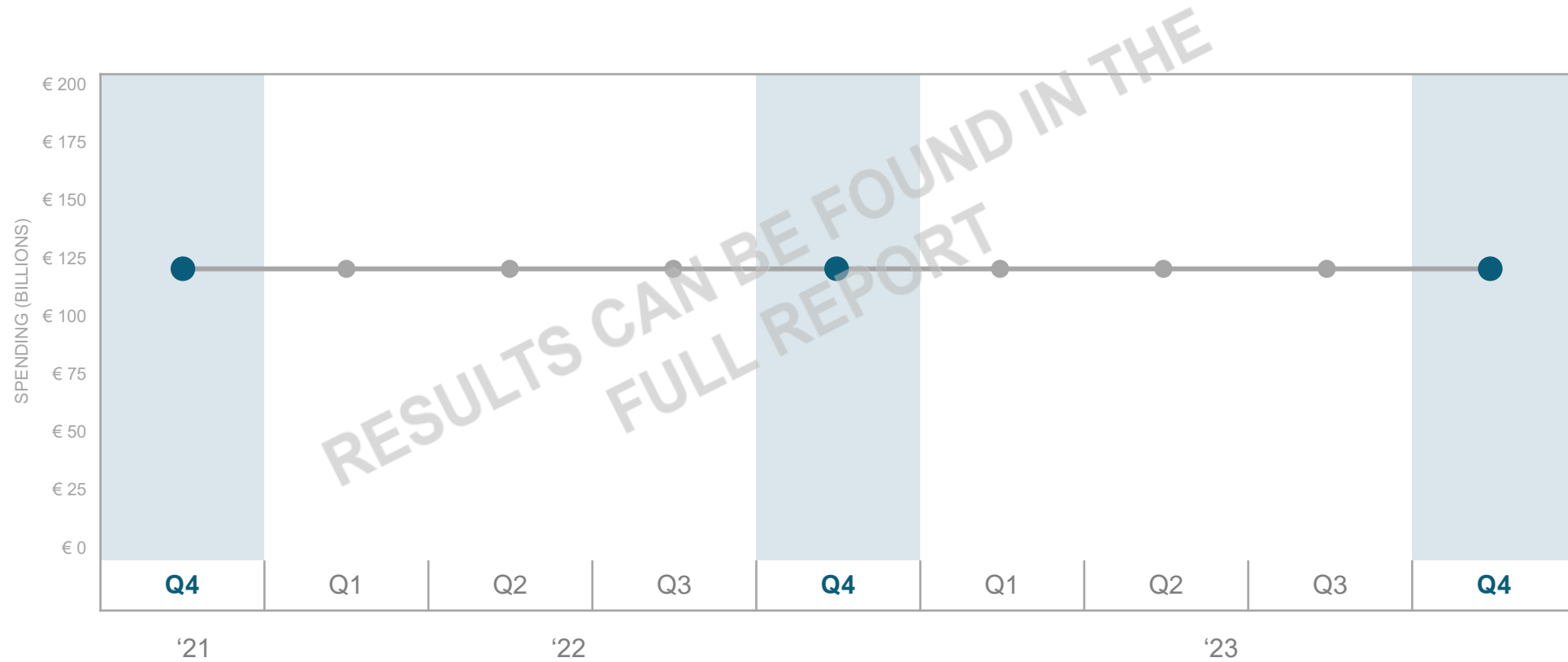
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Share of households that have done a home improvement job
2023 Q4



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European spending on labour + material
2023 Q4

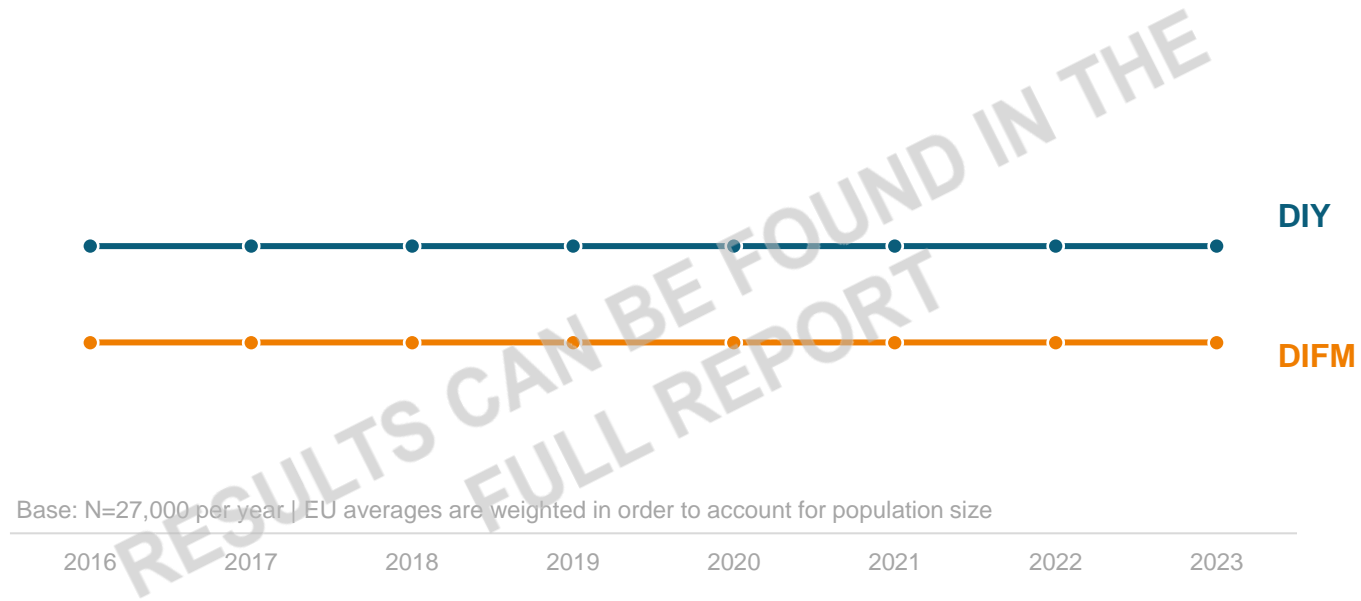


*Only home improvement jobs in which less than 10k (in euros) was spent are included in the calculation.

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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:

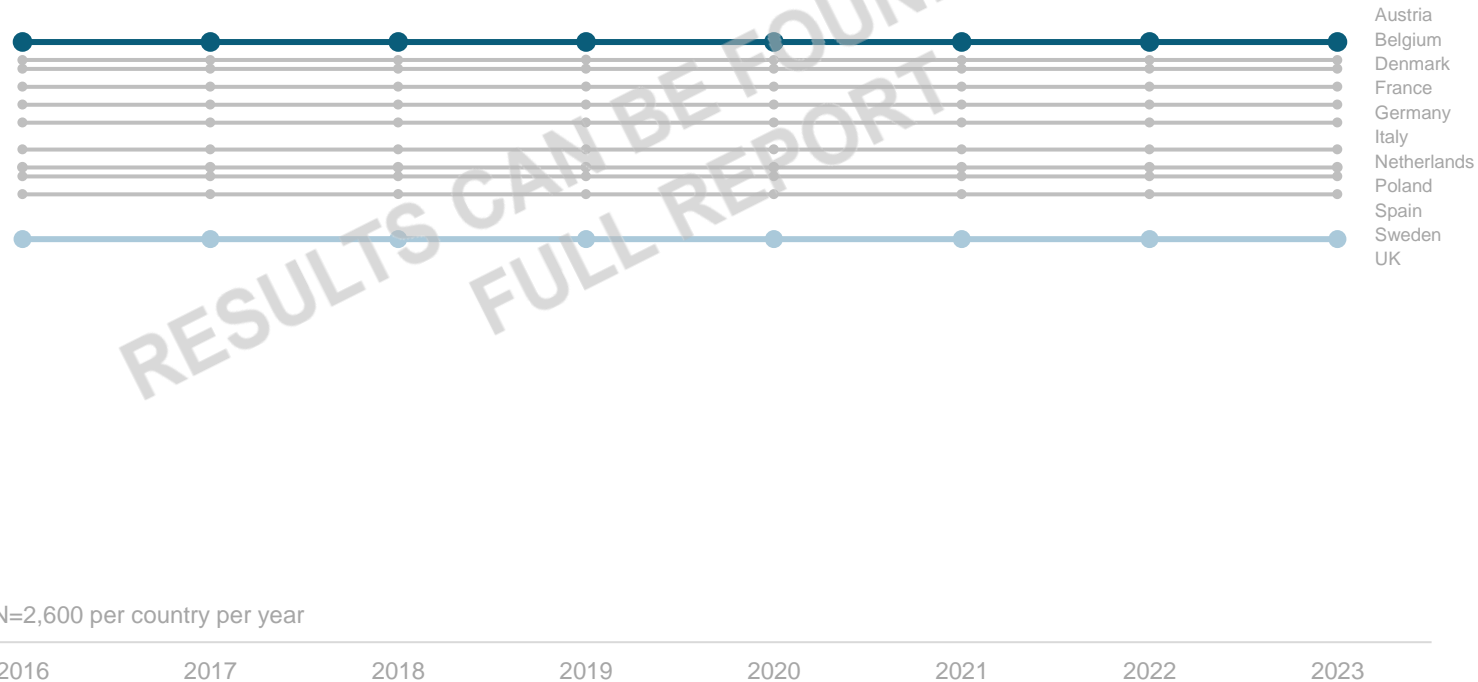
- | | | | |
|-------------------|-------------------|--------------------------|---------------|
| Boiler | Tile adhesive | Bathroom furniture | Taps & mixers |
| Flooring products | Wallpaper | Shower drain | Toilet |
| Lock | Window decoration | Shower enclosures | Washbasin |
| Paint | Roof window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

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DIY home improvement market

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

% DIY

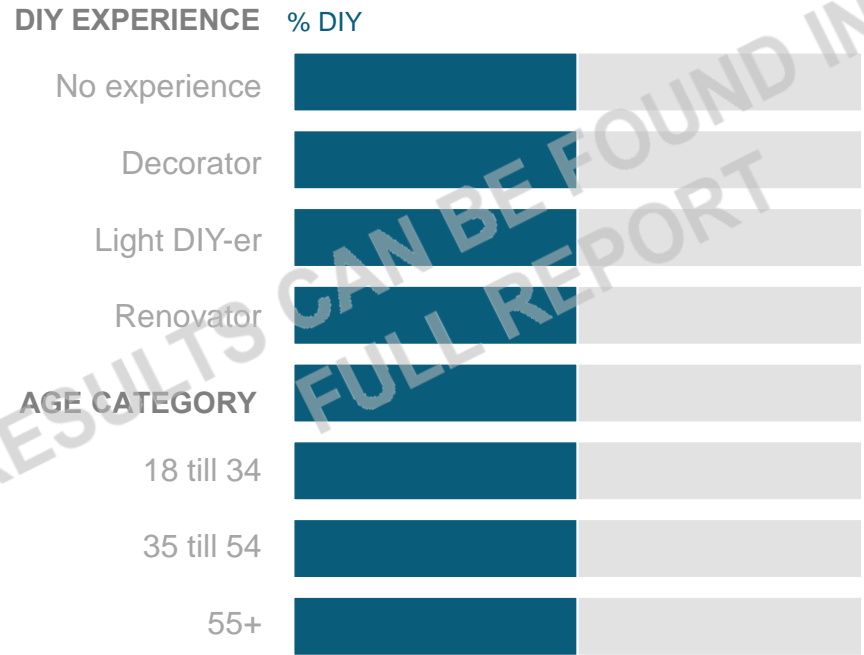


Base: N=2,600 per country per year

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DIY home improvement market

Who was involved in (performed) the work activities?



Base: N=27,000 in total

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Cancellation reasons

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

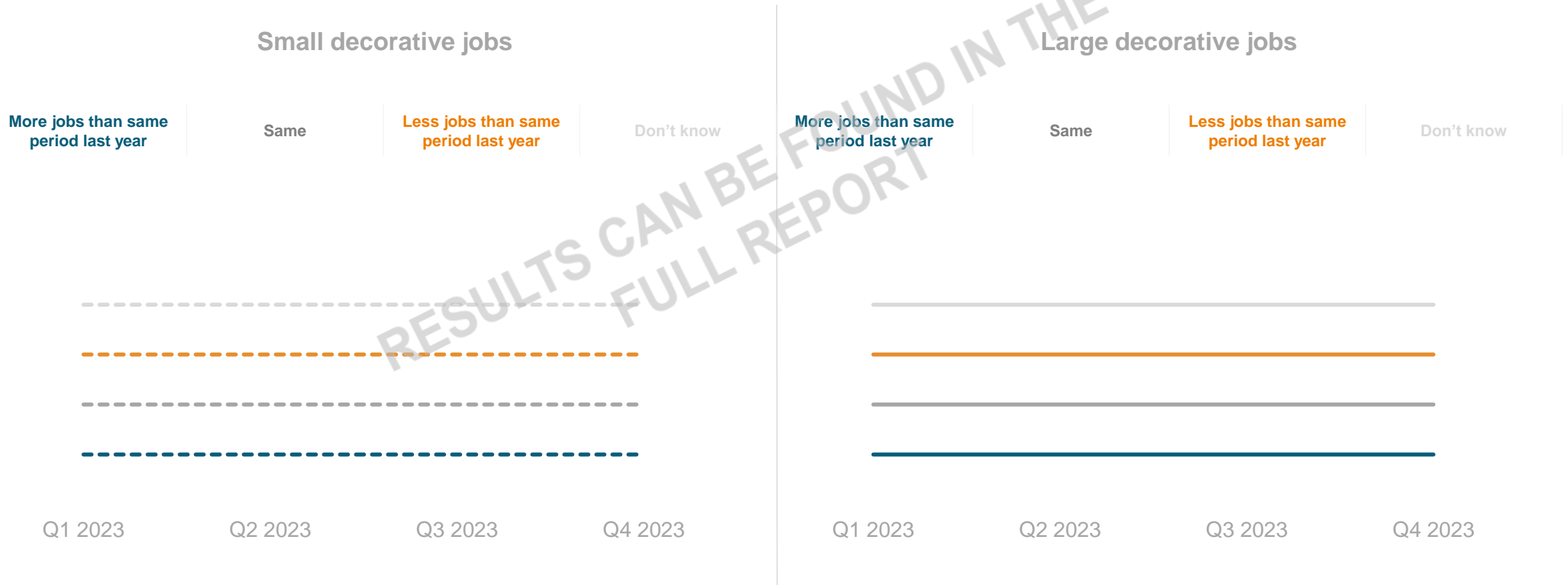
		AT	BE	DK	FR	DE	IT	NL	PL	ES	SE	UK
		x	x	x	x	x	x	x	x	x	x	x
Reason 1		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Reason 2		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Reason 3		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Reason 4		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Reason 5		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Reason 6		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Reason 7		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Reason 8		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

RESULTS CAN BE FOUND IN THE FULL REPORT

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Outlook on decorative jobs compared to the last quarter in 2023

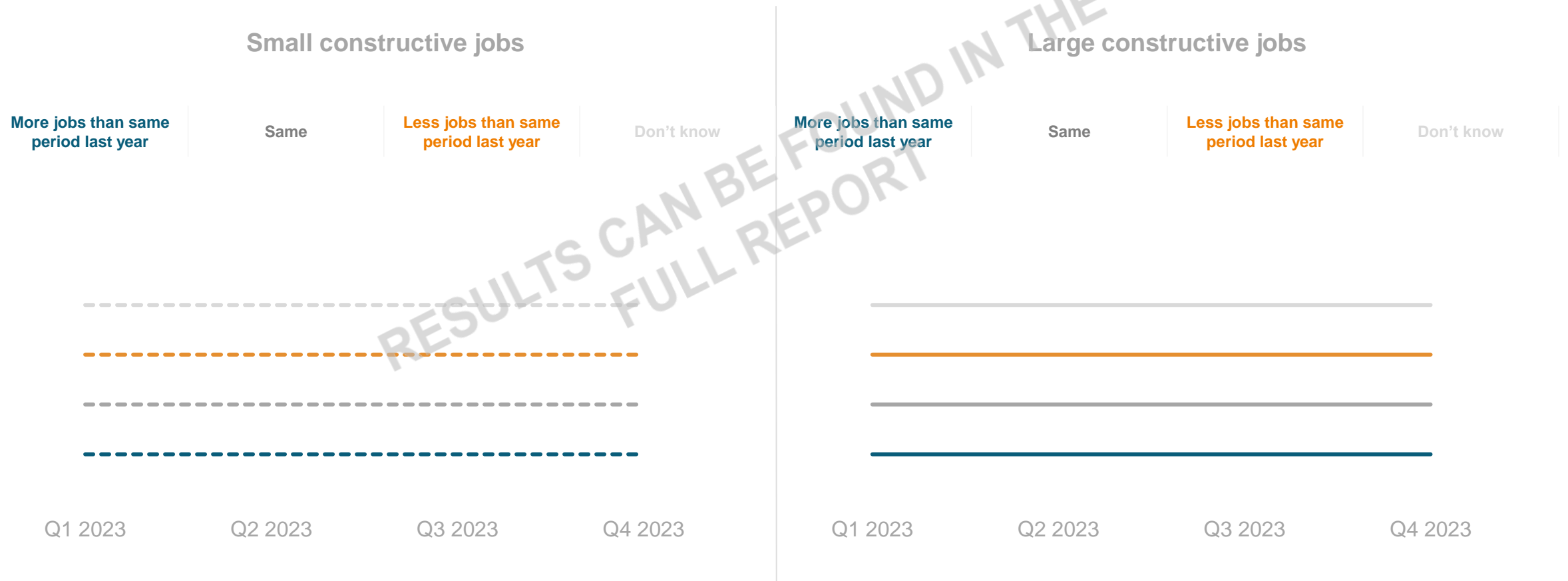
Looking forward to the next three months, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than in the same period last year?



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Outlook on constructive jobs compared to the last quarter in 2023

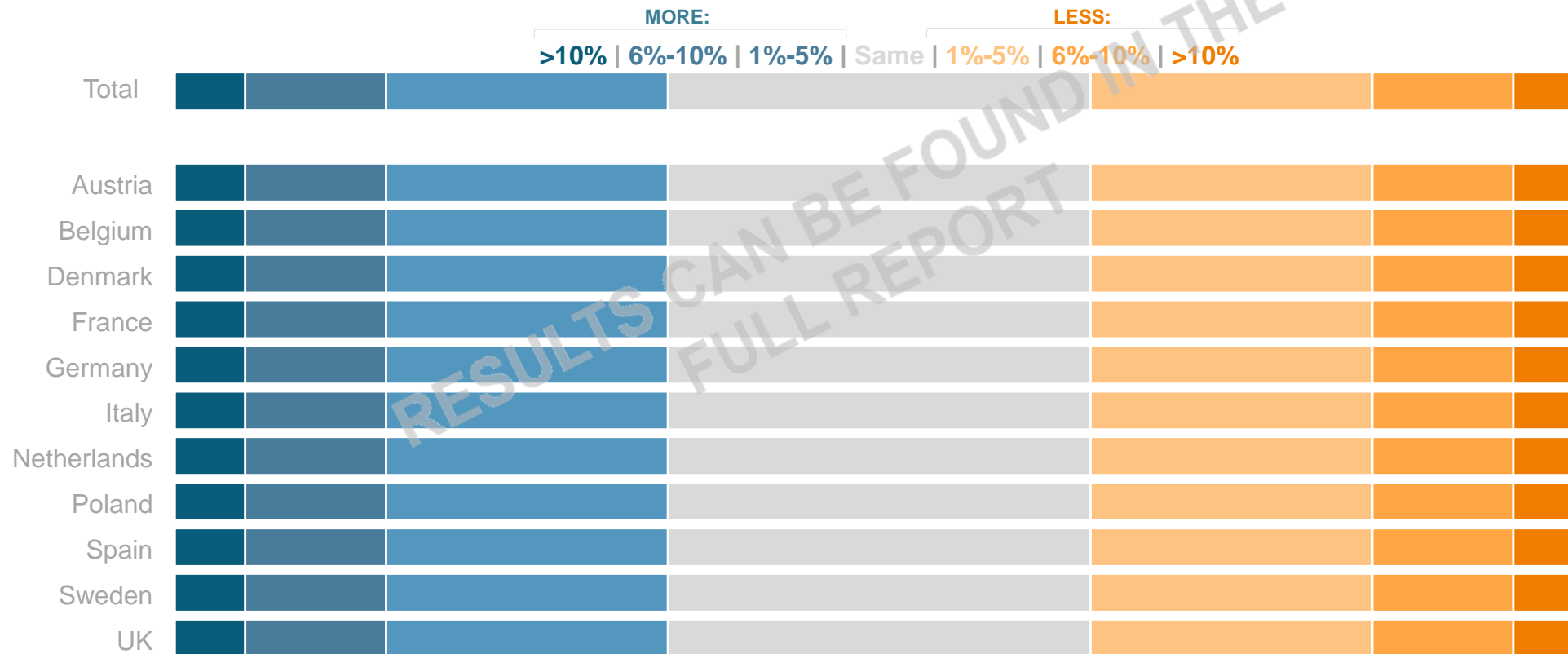
Looking forward to the next three months, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than in the same period last year?



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Spending on improvement jobs

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

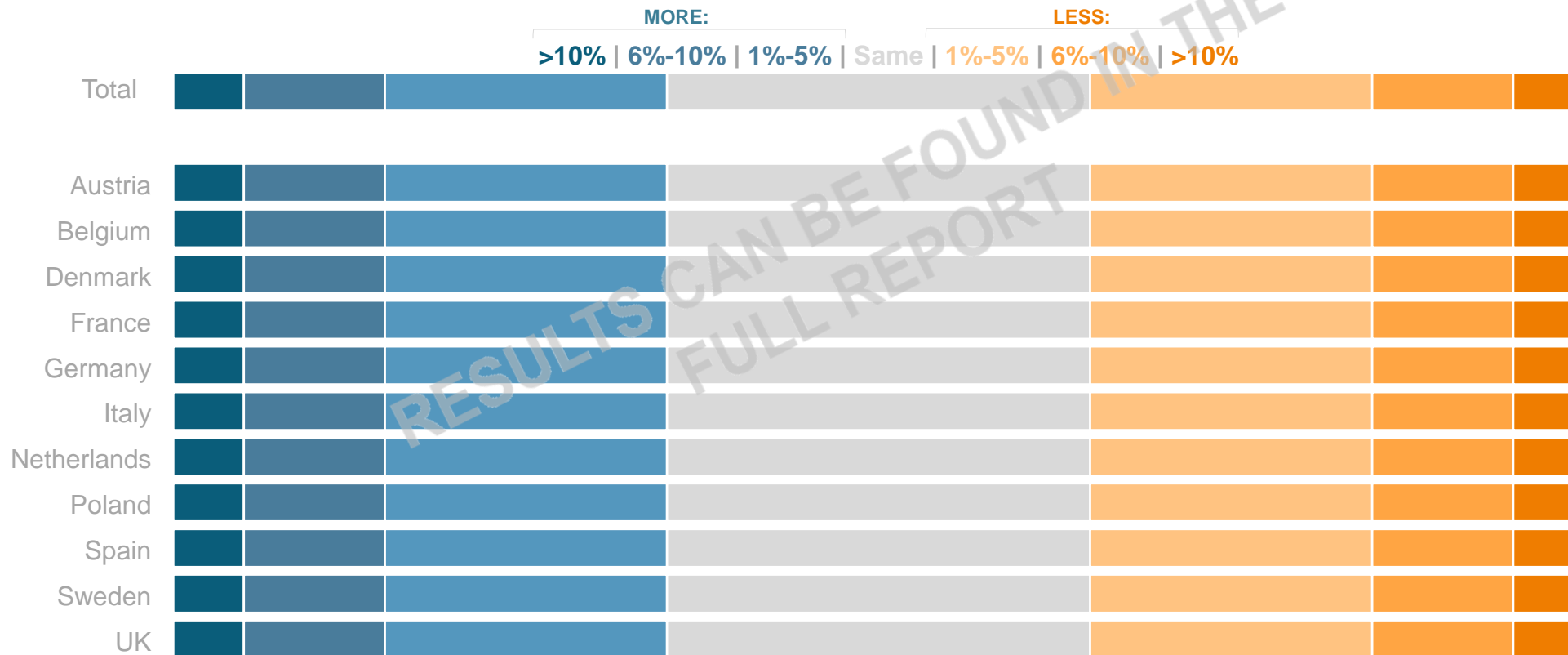


Base: N=6,676
 Values below 5% are not labelled

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Spending on improvement jobs

To what degree do you expect to spend more or less money on home improvement in 2024 compared to 2023?

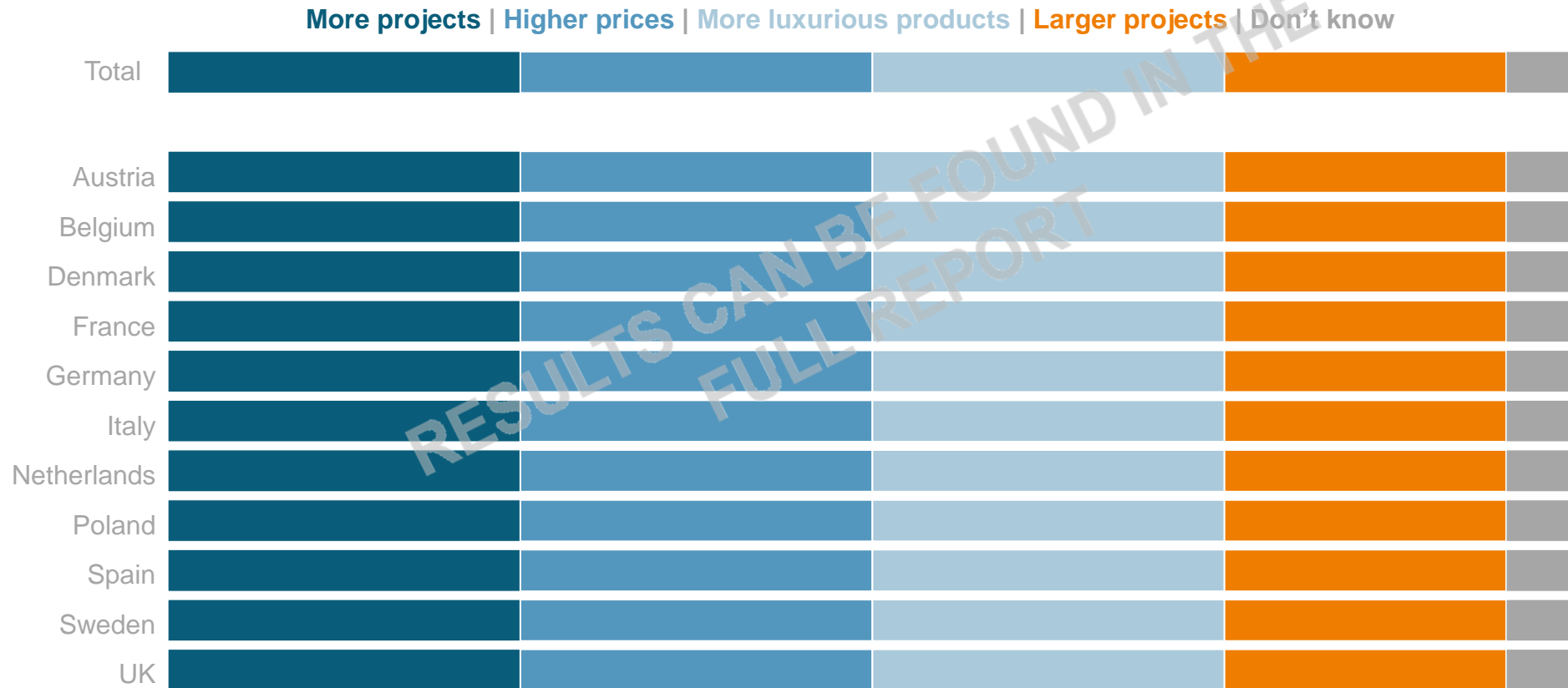


Base: N=6,676
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Spending on improvement jobs

What are the reasons you expect to spend more in 2024?



RESULTS CAN BE FOUND IN THE FULL REPORT

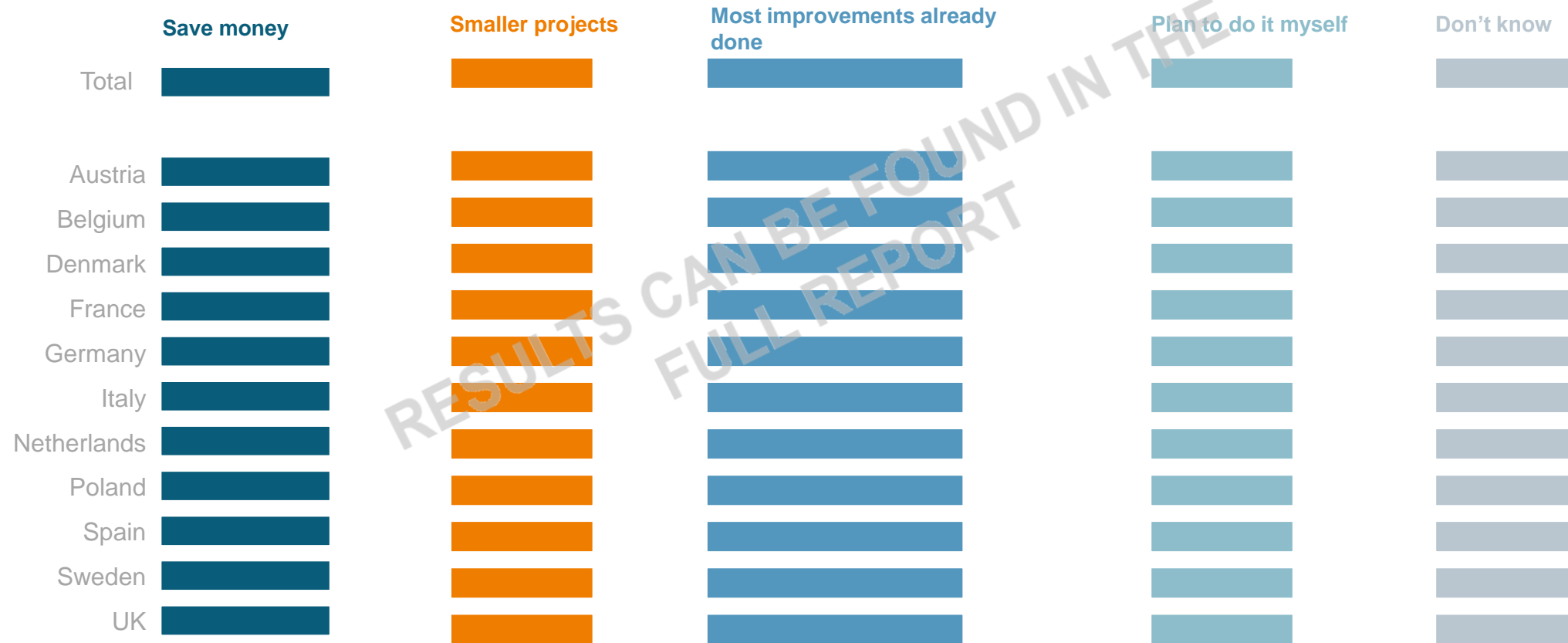
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Base: N=1,628
Values below 5% are not labelled

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Spending on improvement jobs

What are the reasons you expect to spend less in 2024?



Base: N=1,290
 Values below 5% are not labelled

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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?

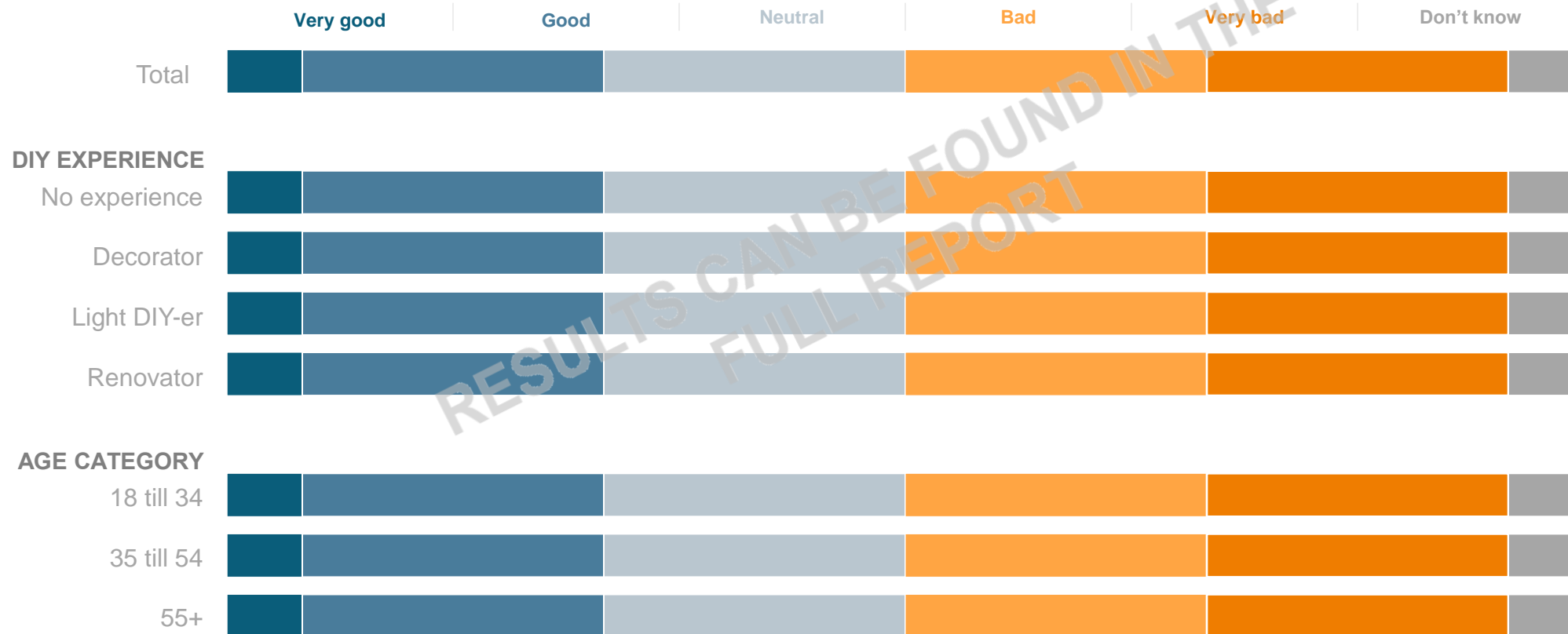


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Start a project under €5.000

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=6,676
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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?

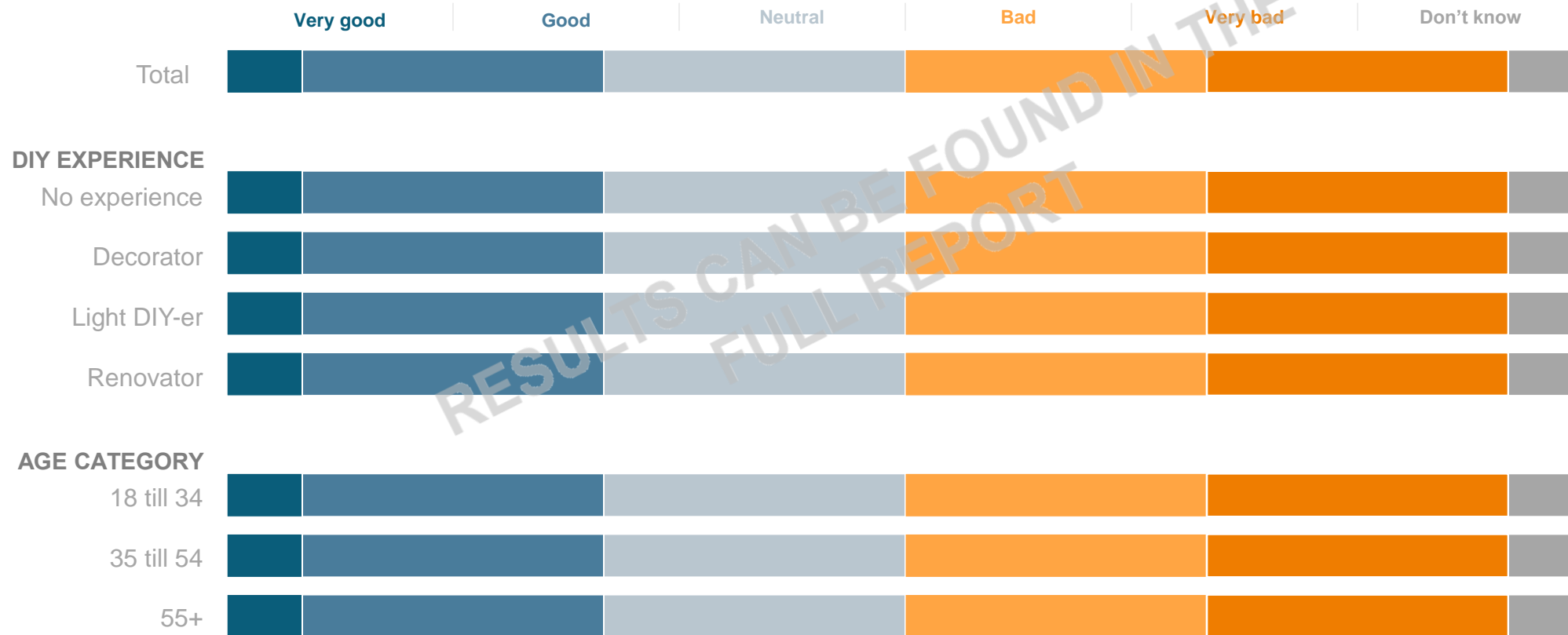


Base: N=6,676
 Values below 5% are not labelled

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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?



Base: N=6,676
 Values below 5% are not labelled

Index

Key insights

Economic developments

Theme: DIY vs. DIFM

European overview

Country overview

Home improvement per category

Appendix



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:

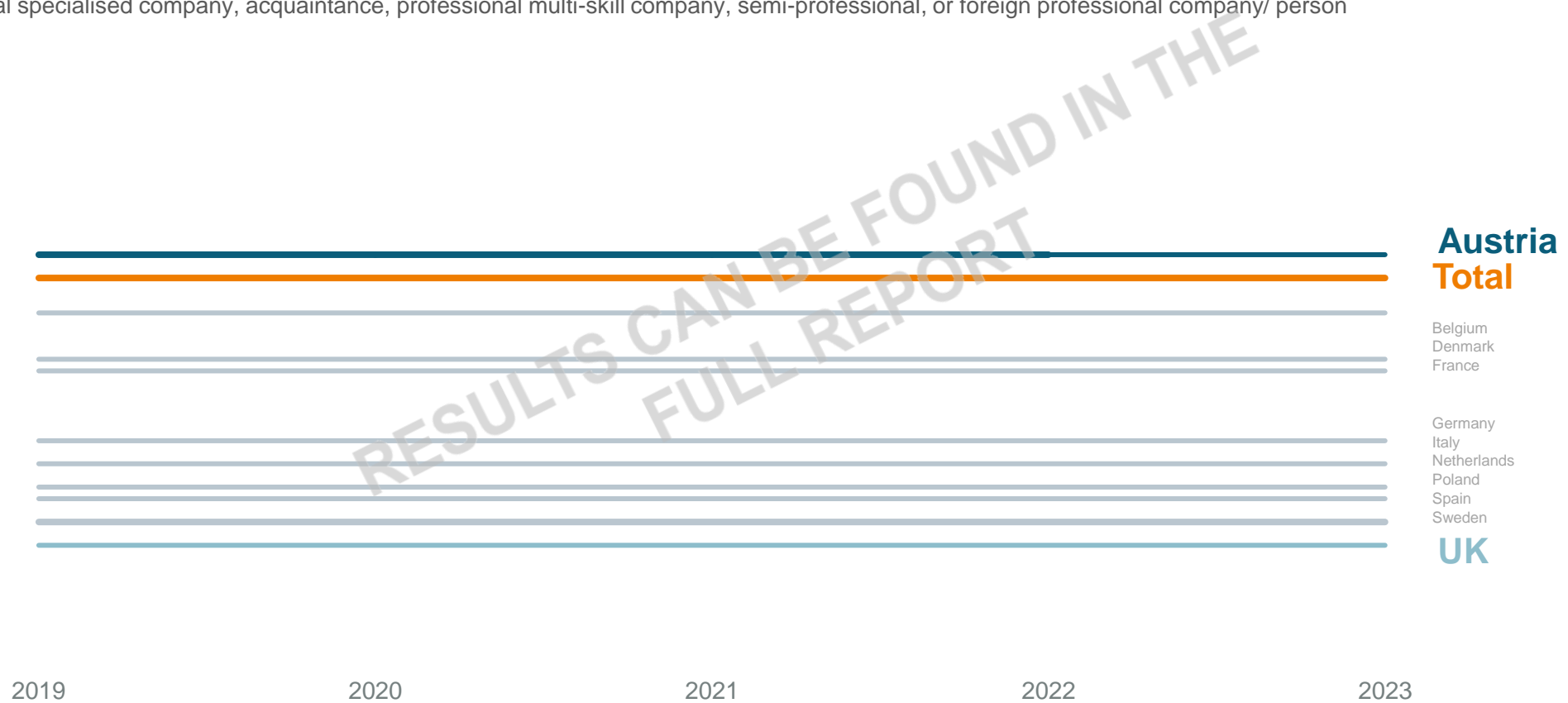
- Have you **outsourced** any home improvement projects in the past two years?
- What is your most important barrier to hiring a professional for your next planned home improvement job and doing home improvement jobs yourself?
- Looking forward to the months January – March, do you expect the number 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 January – March 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?
- Which home renovations are you **planning to do in 2024?** How far are you with planning this renovation?
- To what degree do you expect to spend **more or less money** on home improvement in **2024 compared to 2023?** What are the reasons you expect to spend more/less in 2024?

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The share of households that have outsourced home improvement projects

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

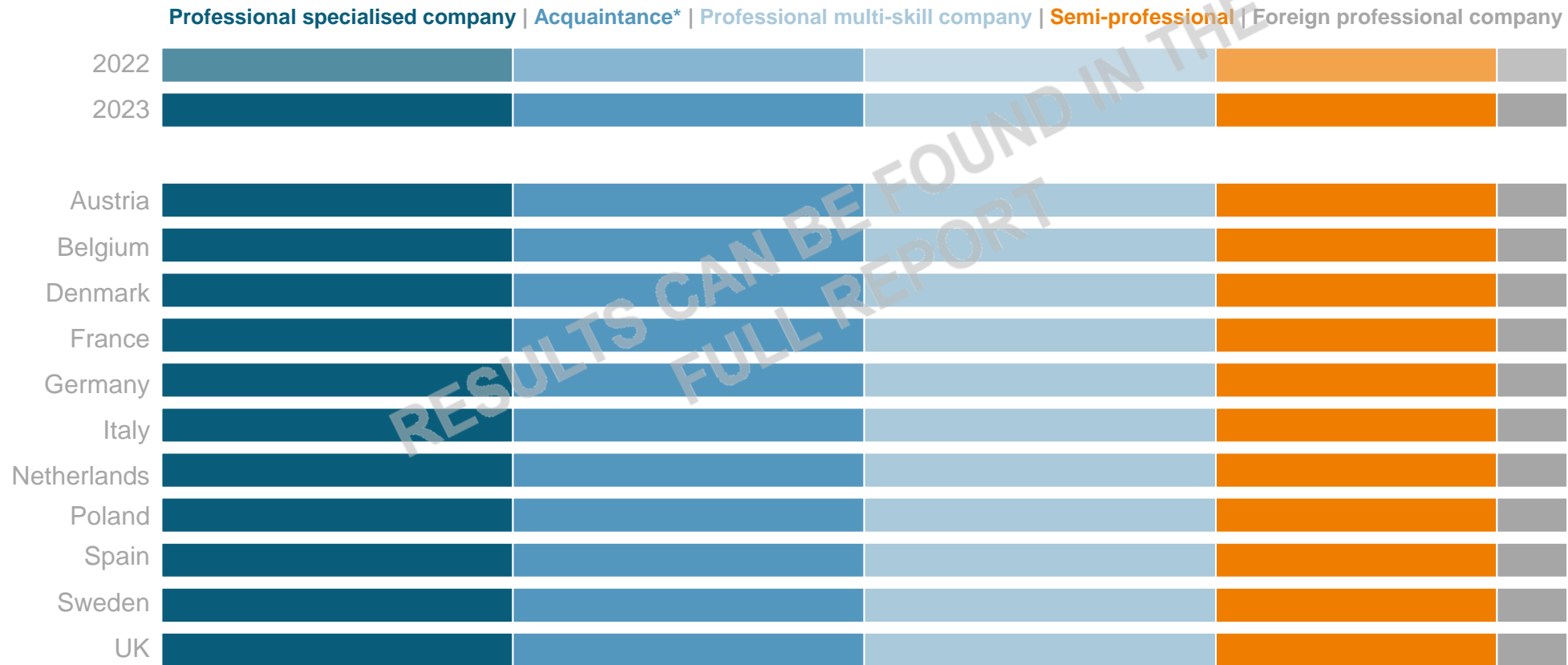


Base: n=6,608, all respondents

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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=6,676

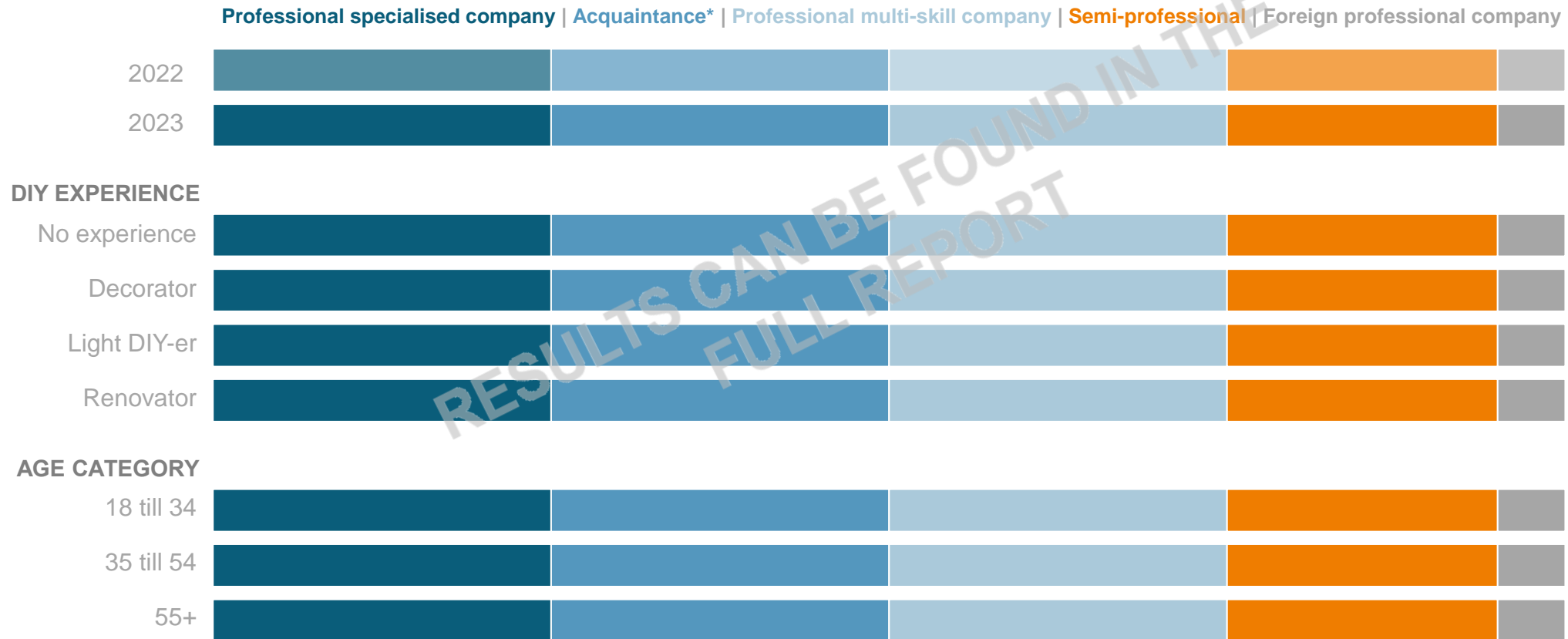
Values below 5% are not labelled

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

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Outsourcing home improvement jobs

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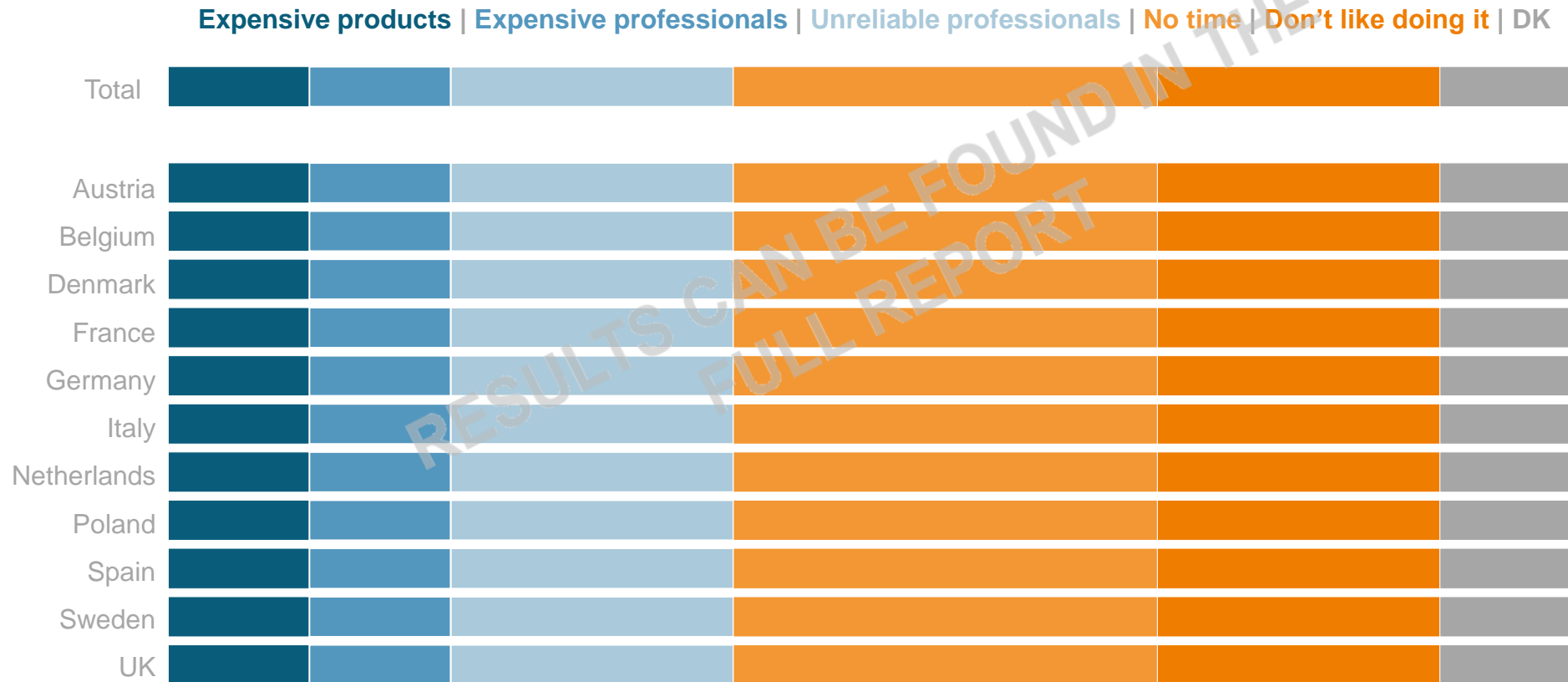
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* Acquaintance: Someone the respondent knows and didn't have to pay (e.g. friend / family) and persons from their own household are excluded

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Barriers to home improvement

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

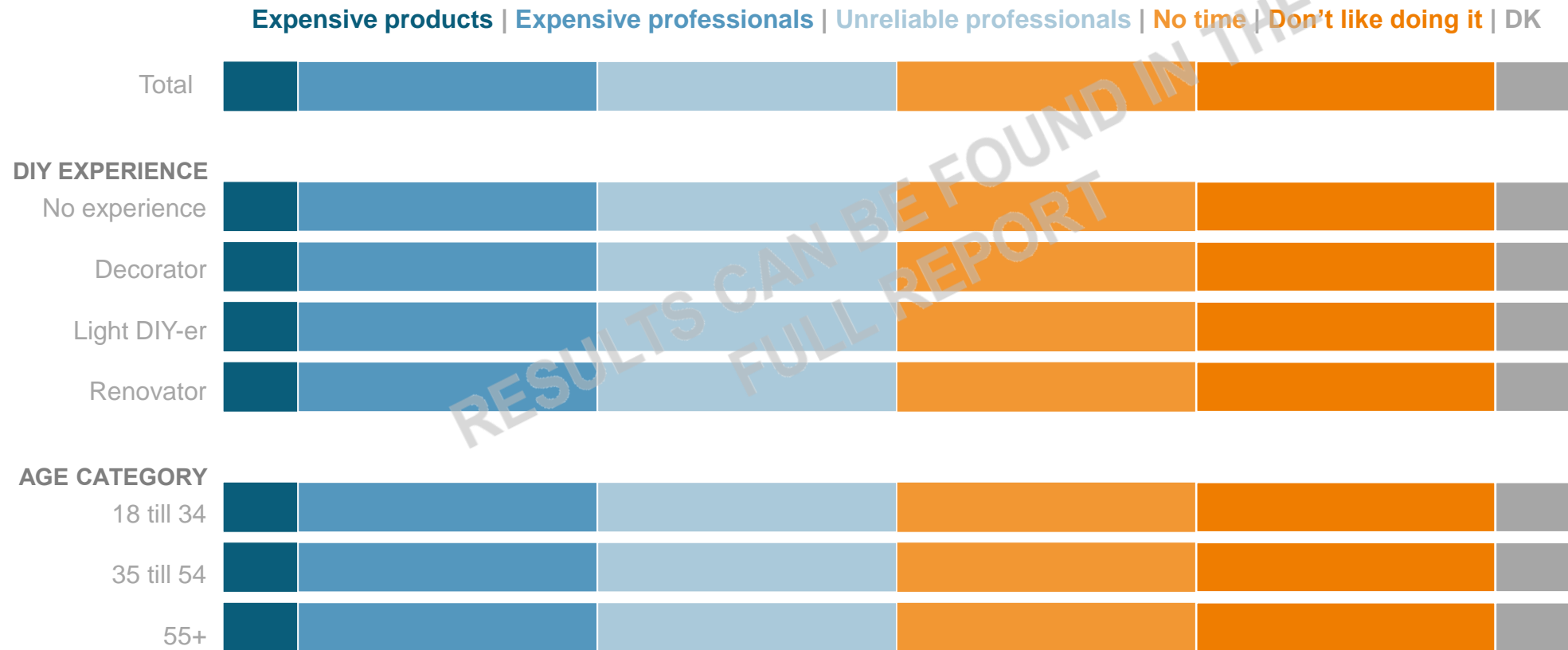


Base: N=6,676

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Barriers to home improvement

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

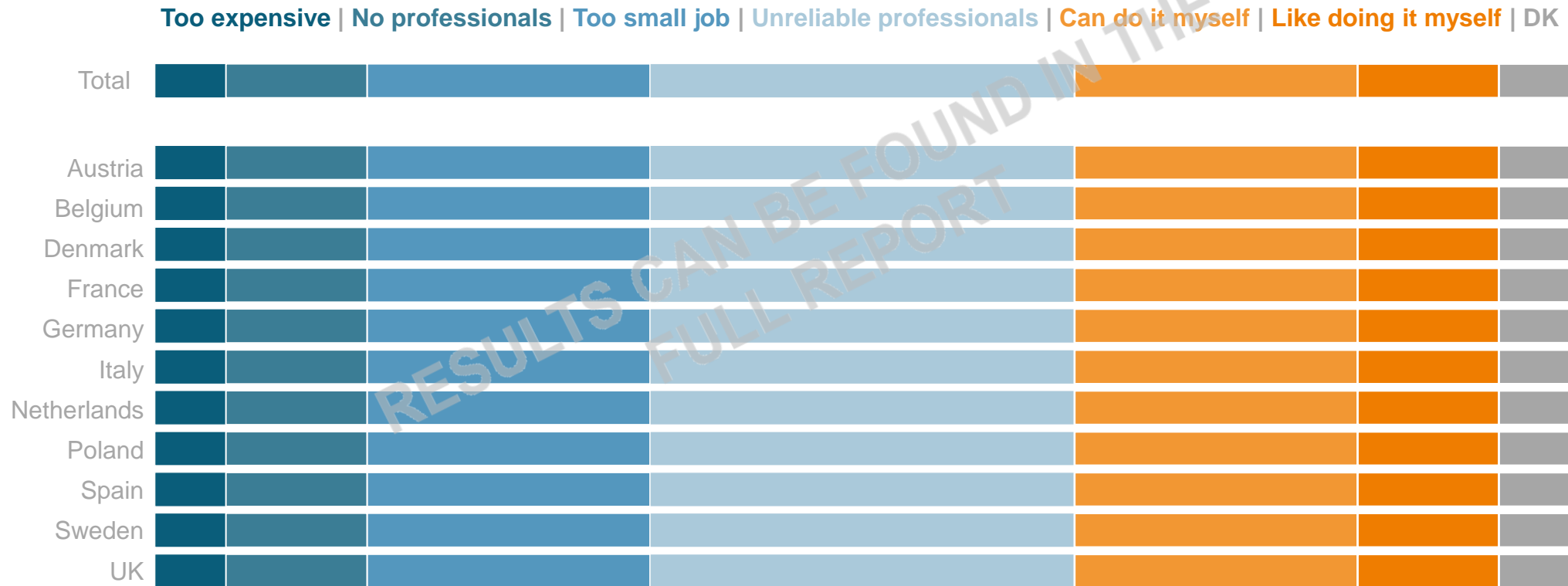


Base: N=6,676
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Barriers to hiring a professional

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

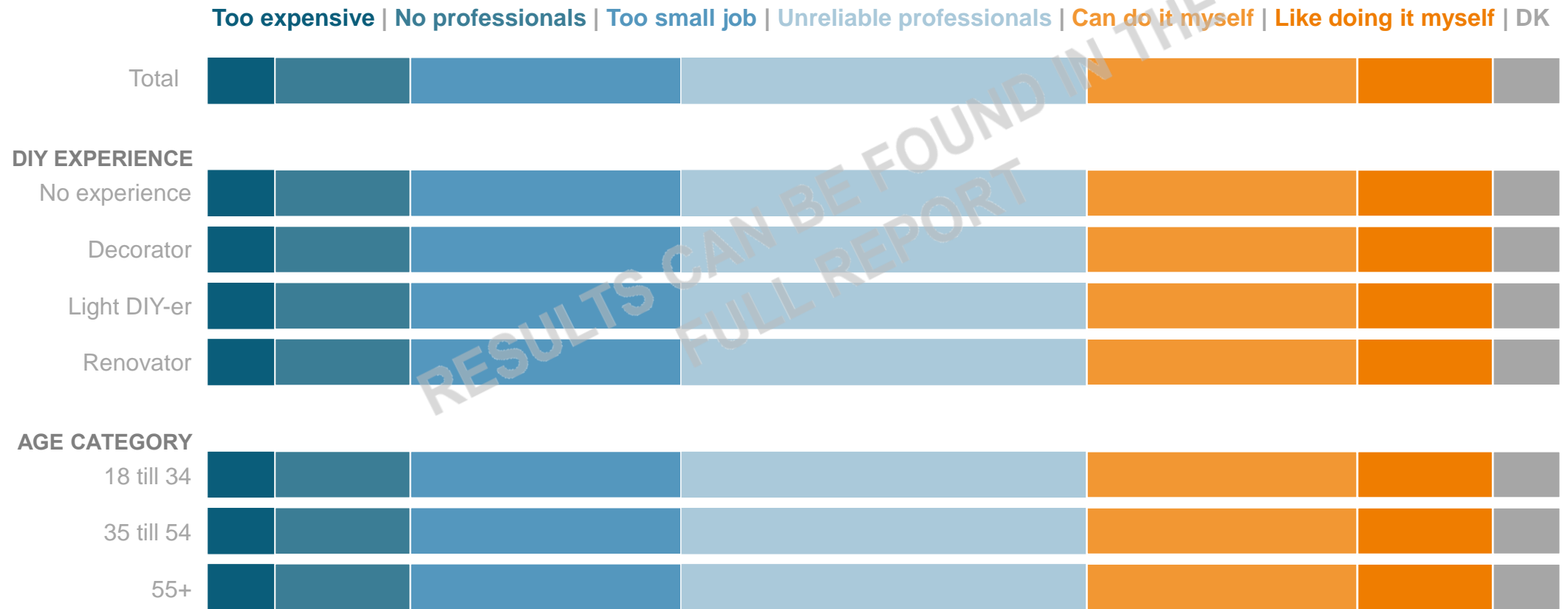


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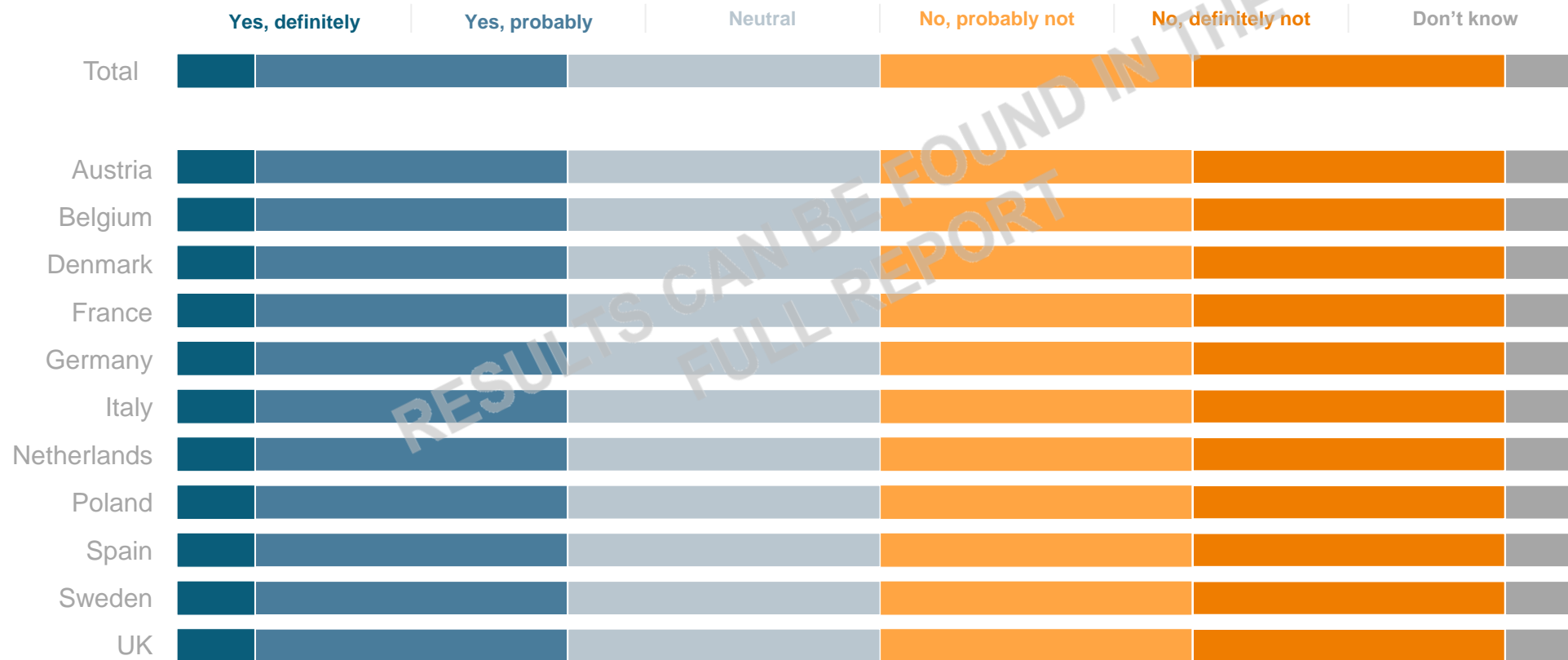


Base: N=6,676
 Values below 5% are not labelled

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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?

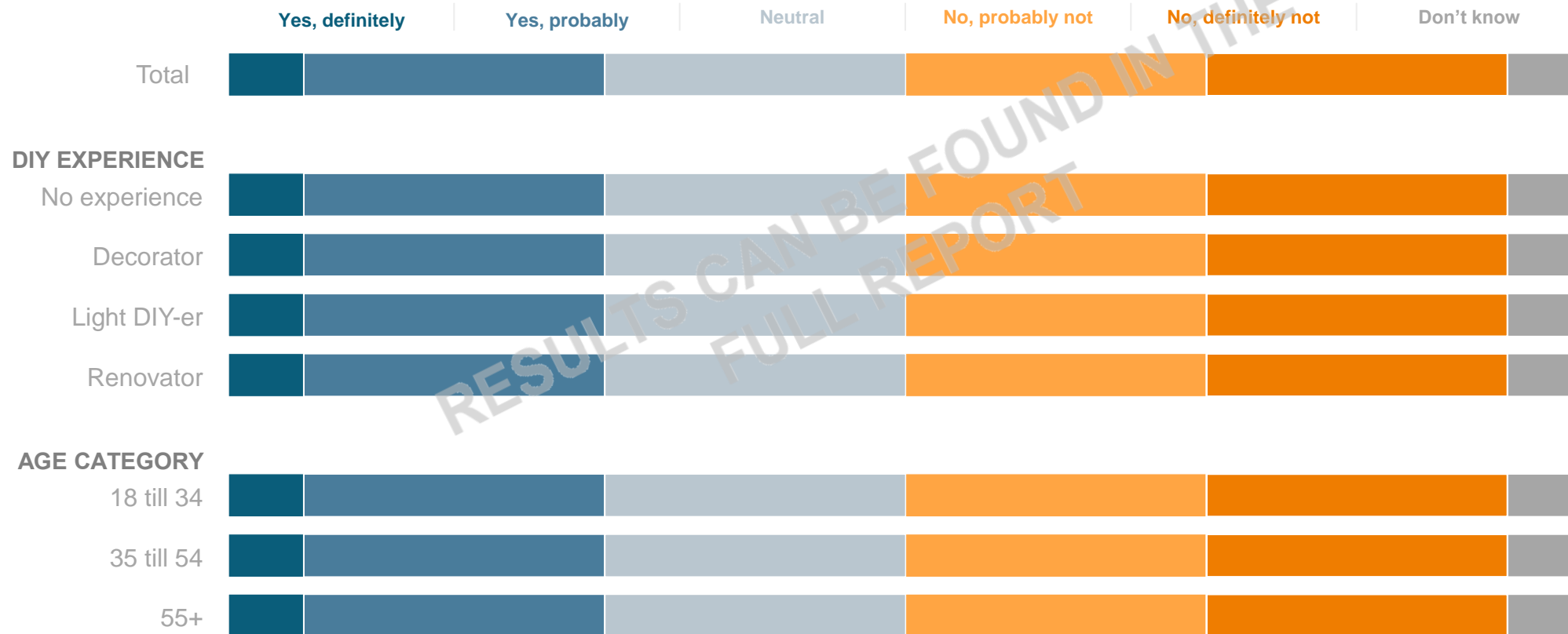


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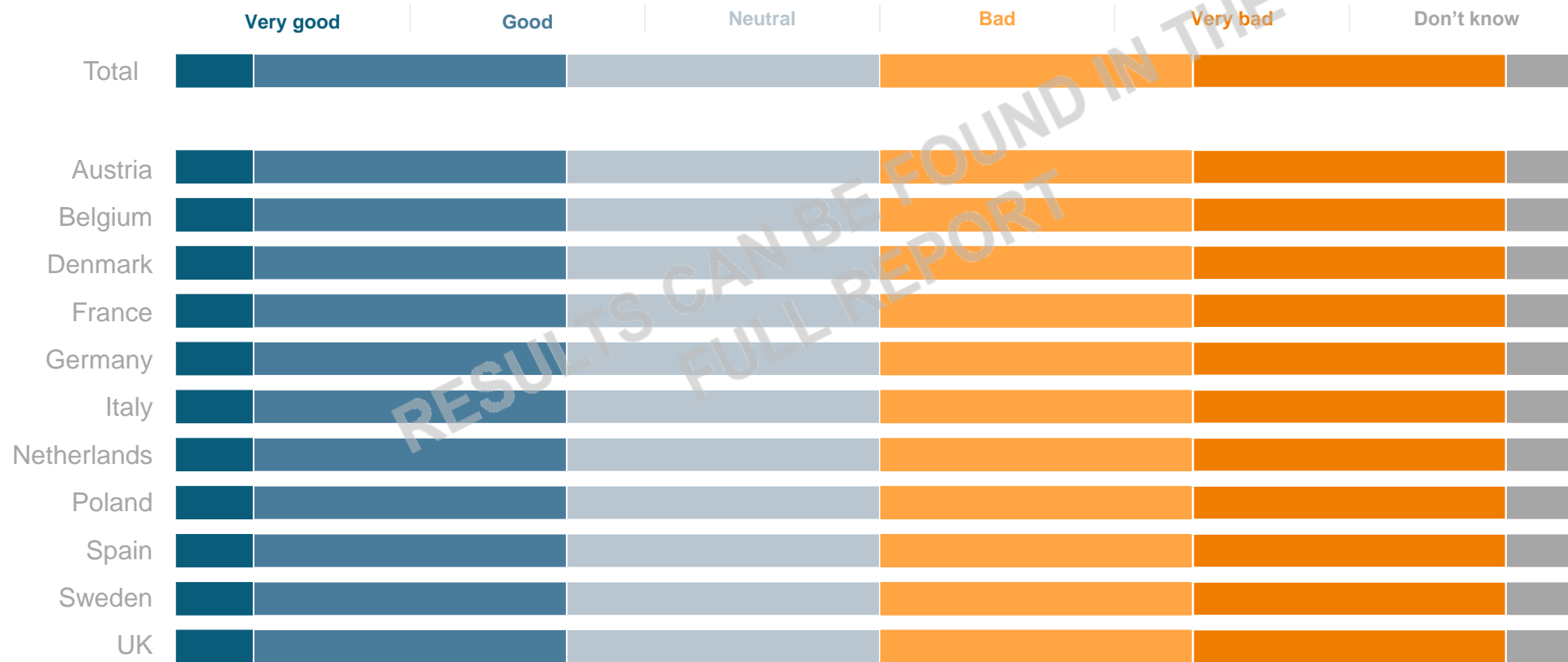


Base: N=6,676
 Values below 5% are not labelled

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Hire a professional

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

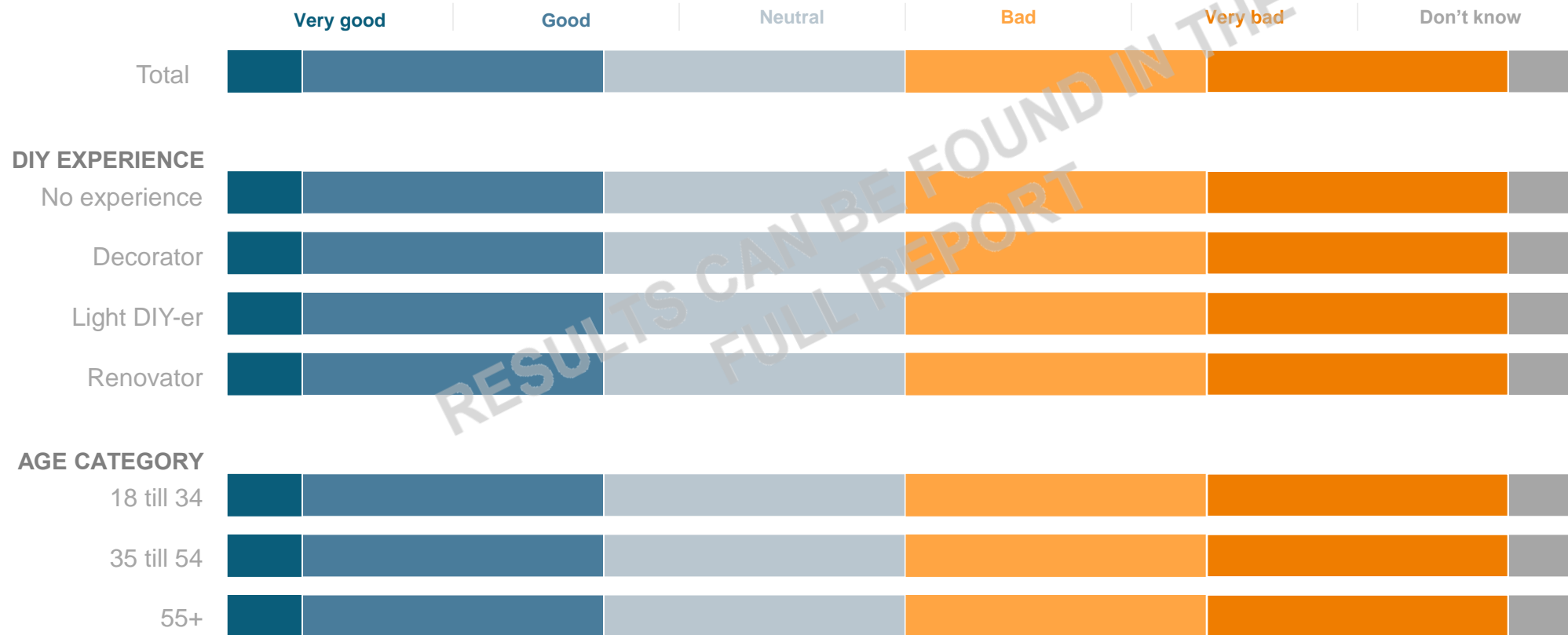


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Hire a professional

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

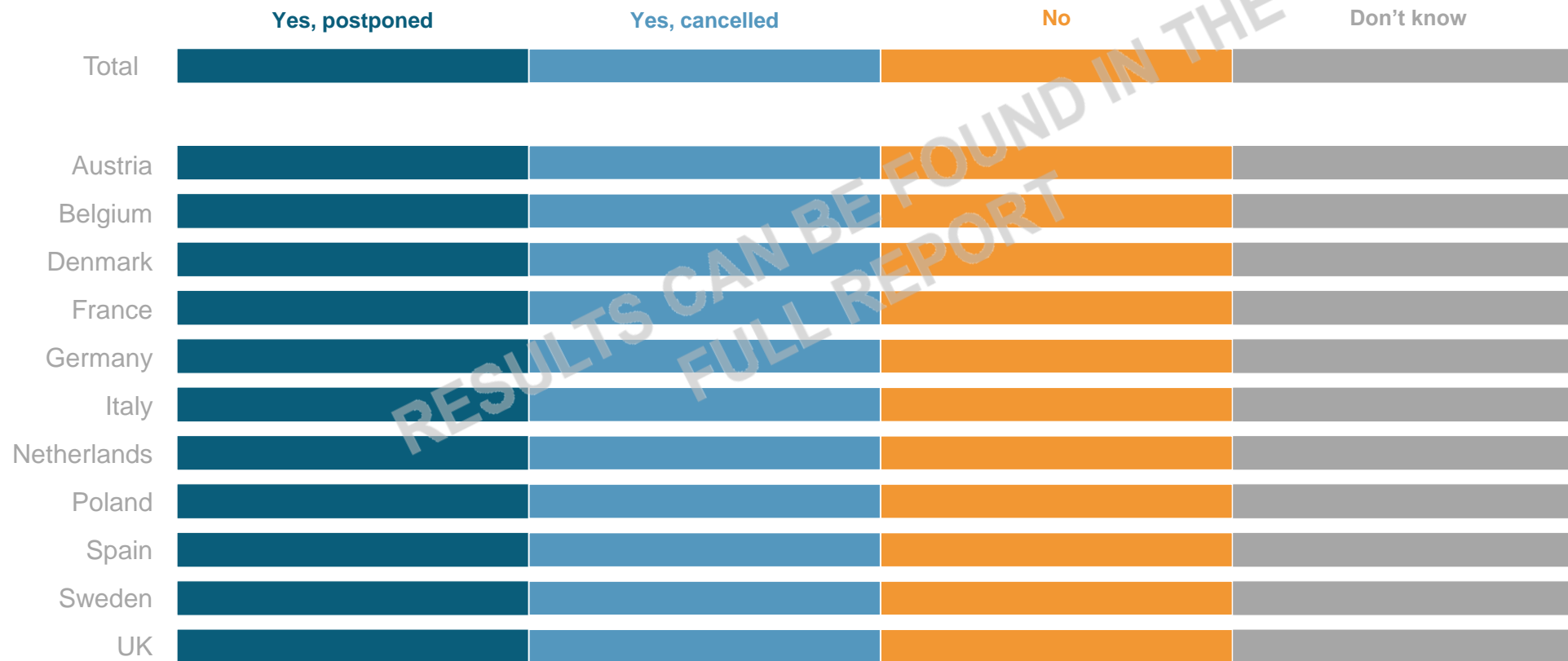


Base: N=6,676
 Values below 5% are not labelled

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Postponed / cancelled home improvement project

In the last 30 days, have you postponed or cancelled a home improvement, repair or maintenance project you planned to start?

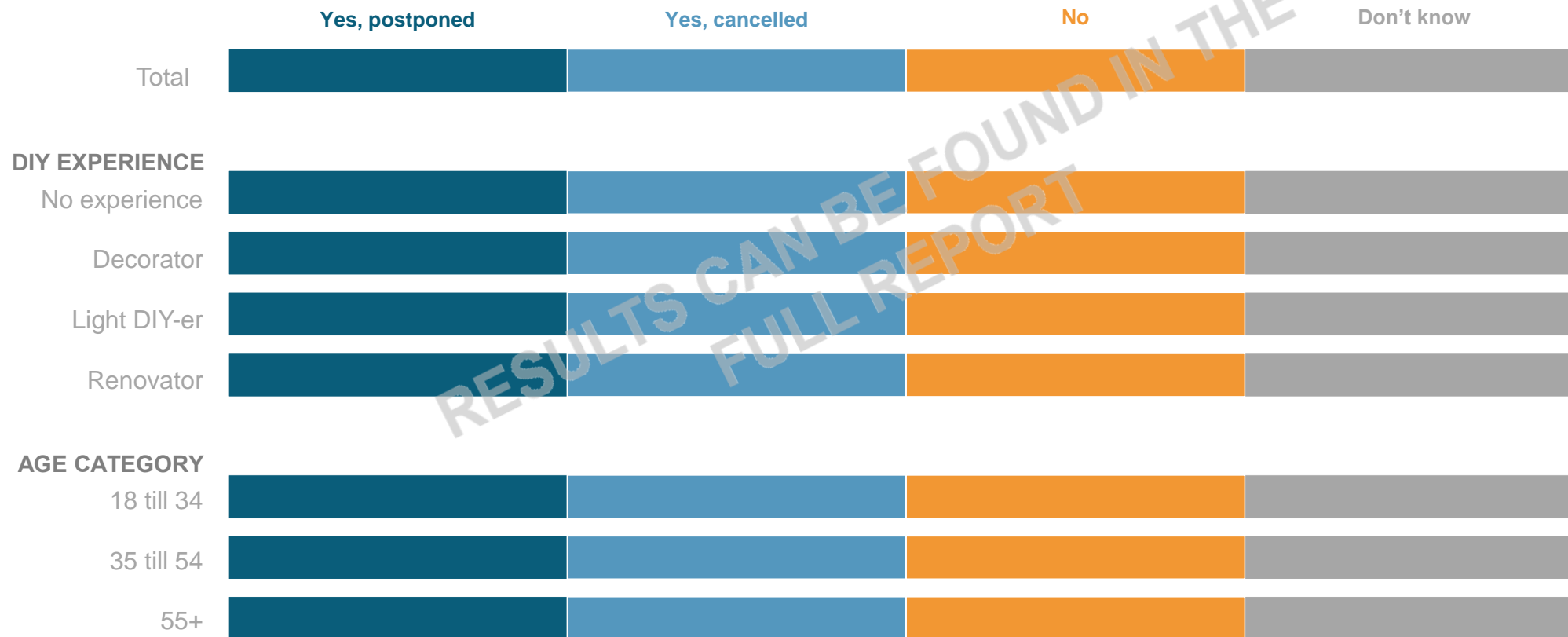


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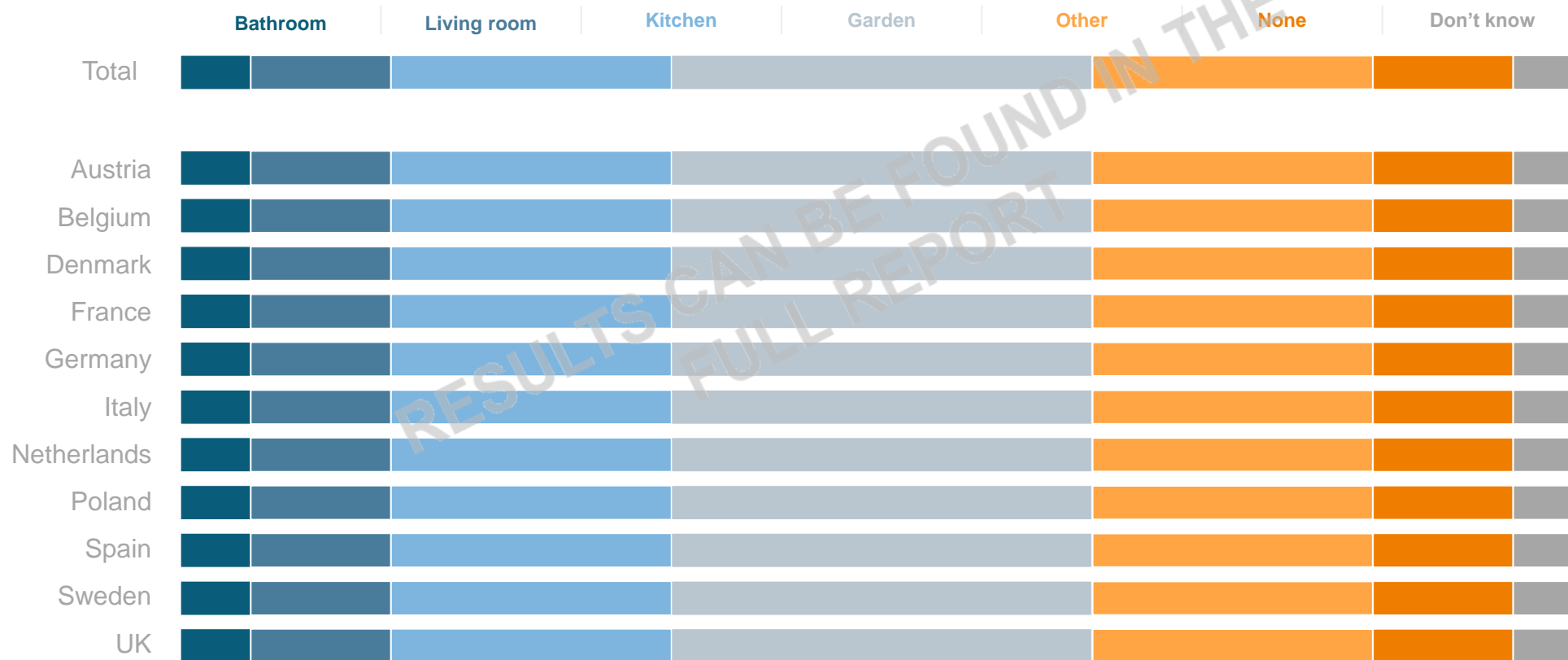


Base: N=6,676
 Values below 5% are not labelled

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Planned home renovations

Which home renovations are you planning to do in 2024?

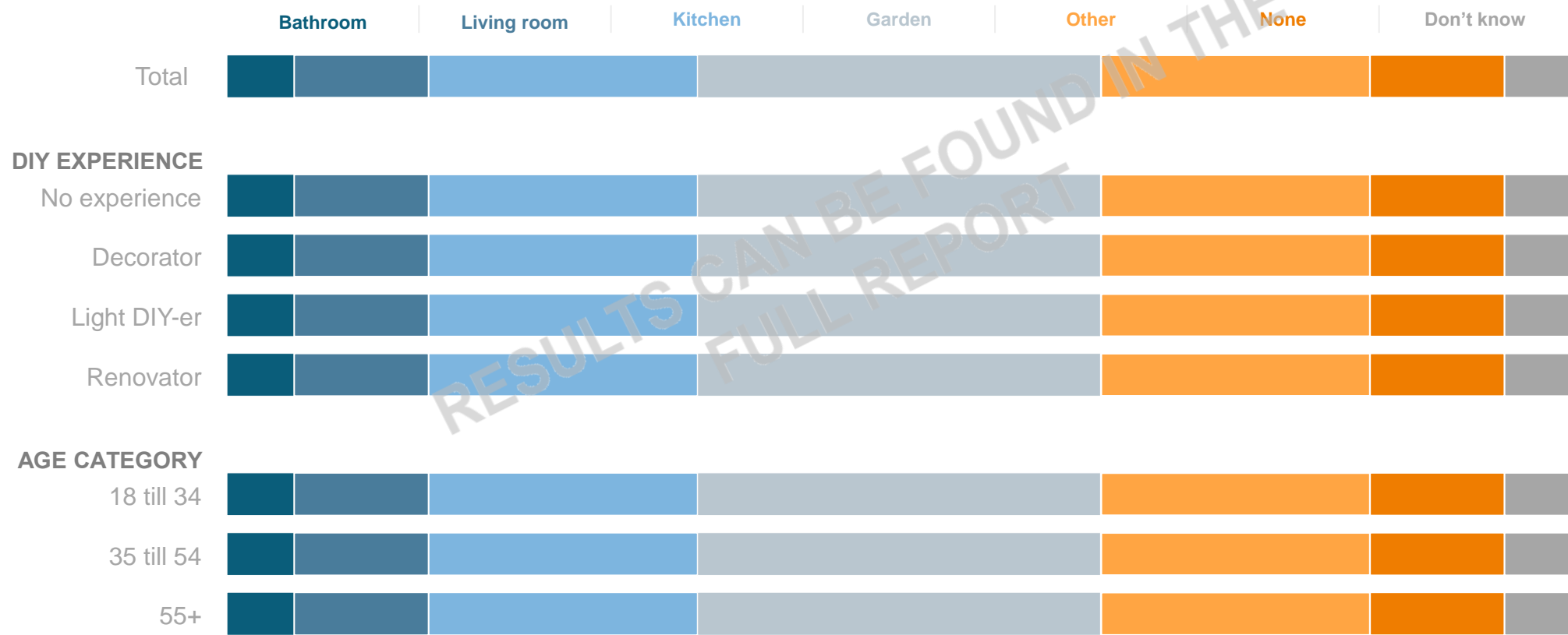


Base: N=6,676

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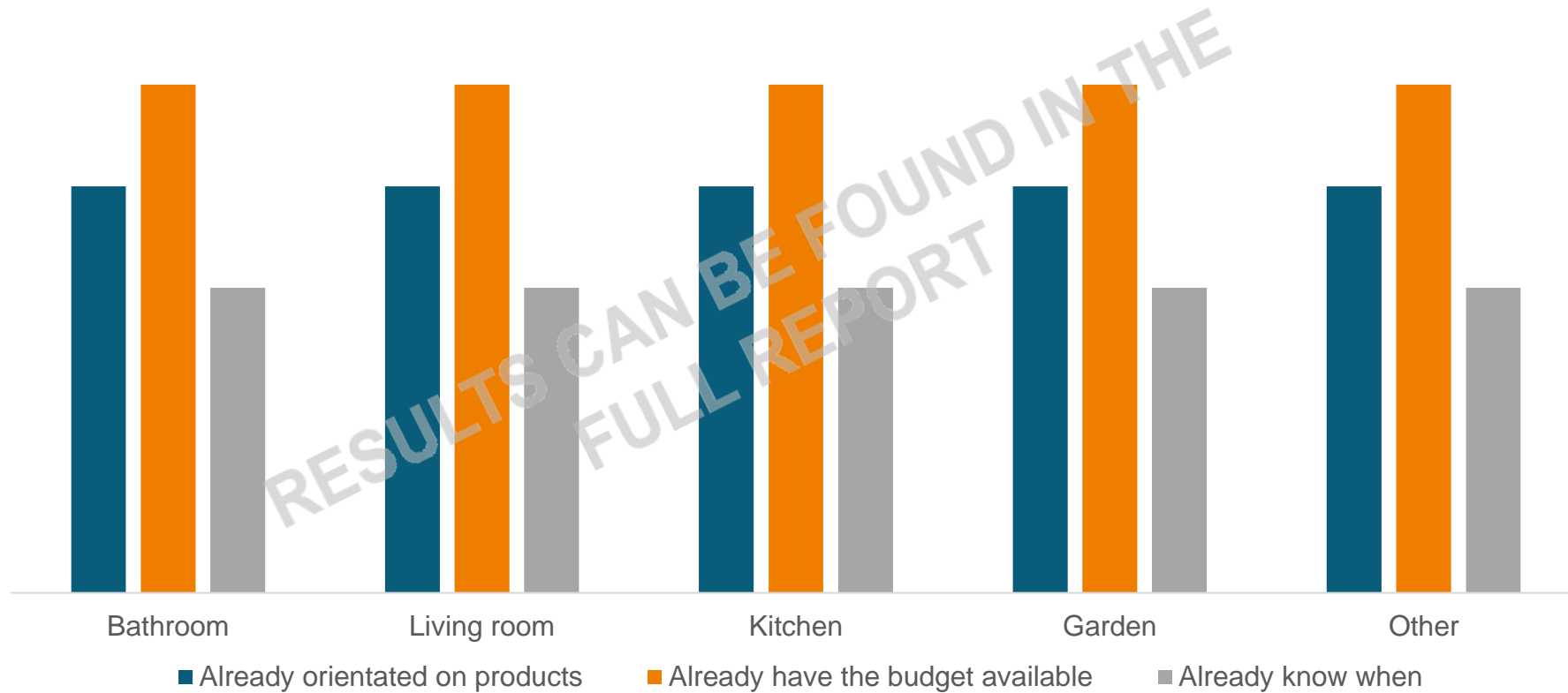


Base: N=6,676
 Values below 5% are not labelled

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Planned home renovations

How far are you with planning your renovation?

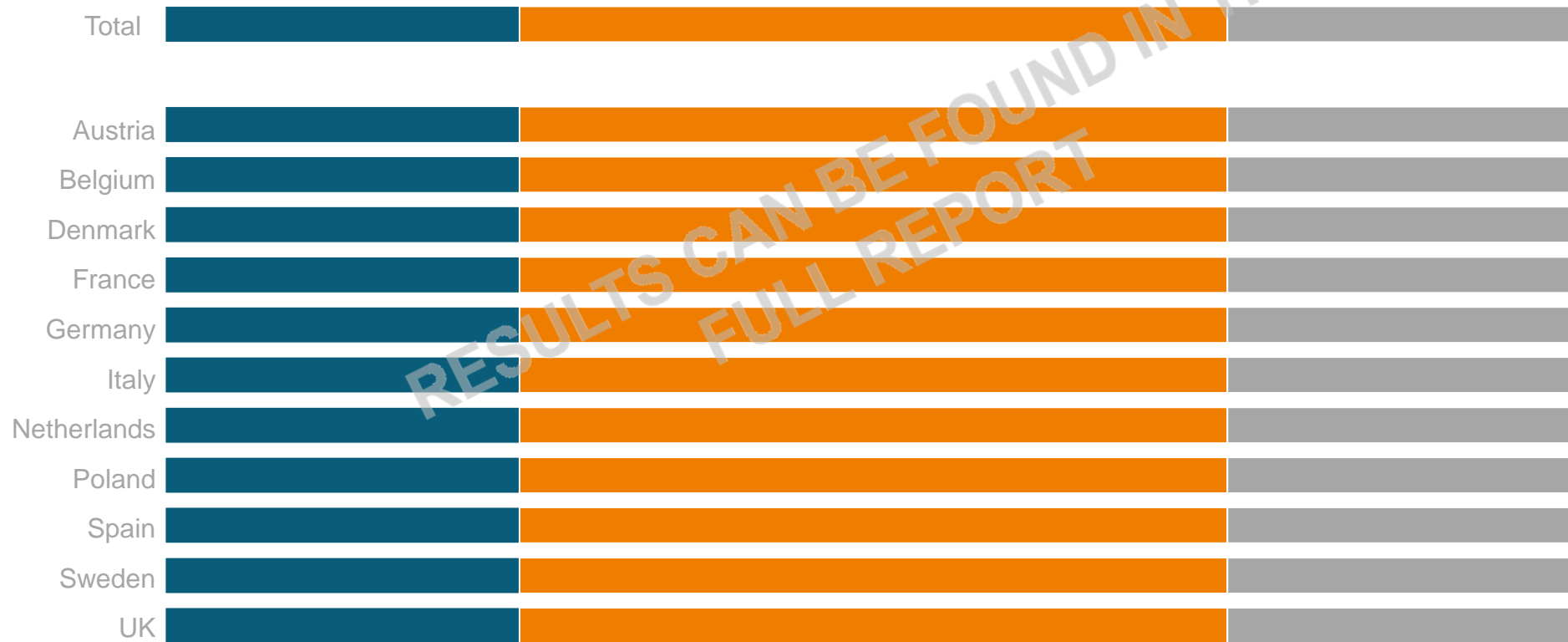


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Moving plans

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

Yes | No | Don't know



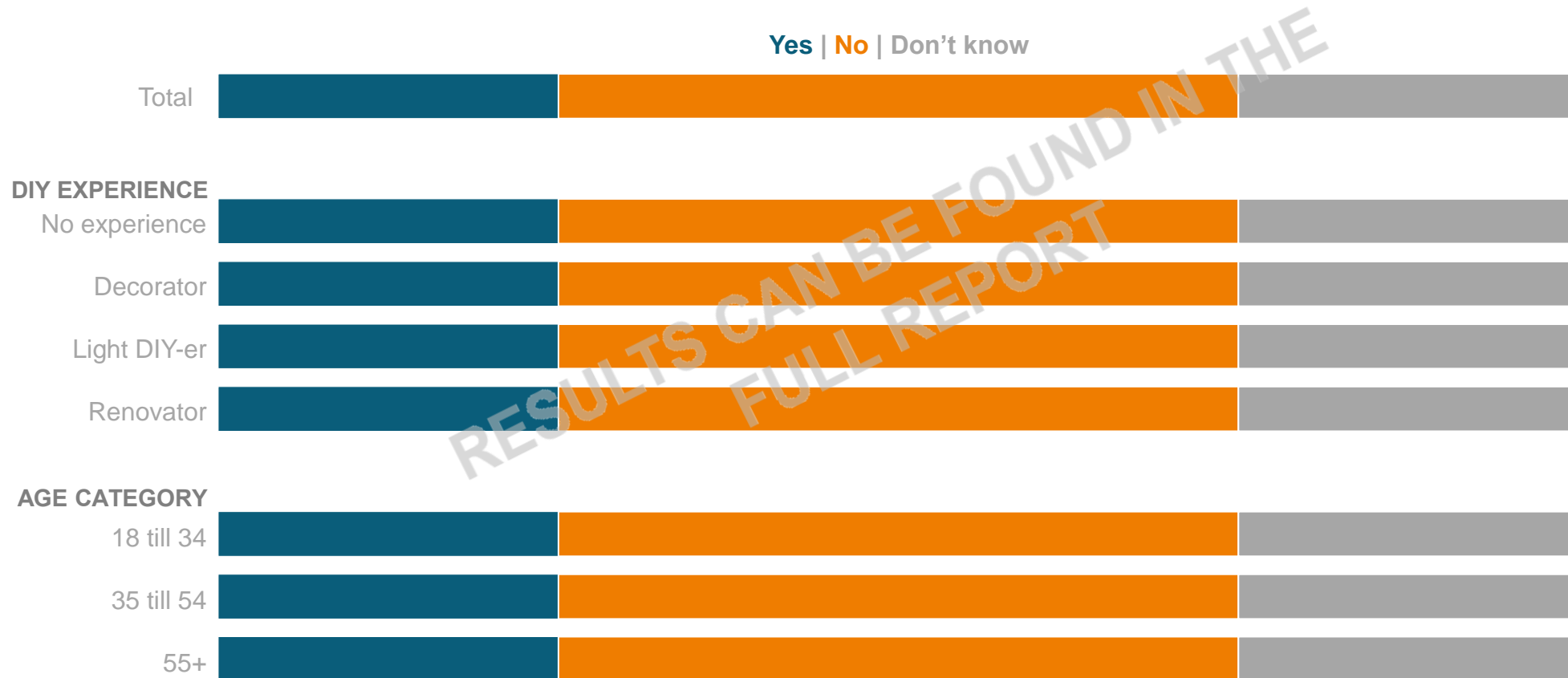
Base: N=6,676

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Moving plans

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

Yes | No | Don't know



Base: N=6,676

Index

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Country overview

Home improvement per category

Appendix



AUSTRIA

Share of households that did a home improvement job

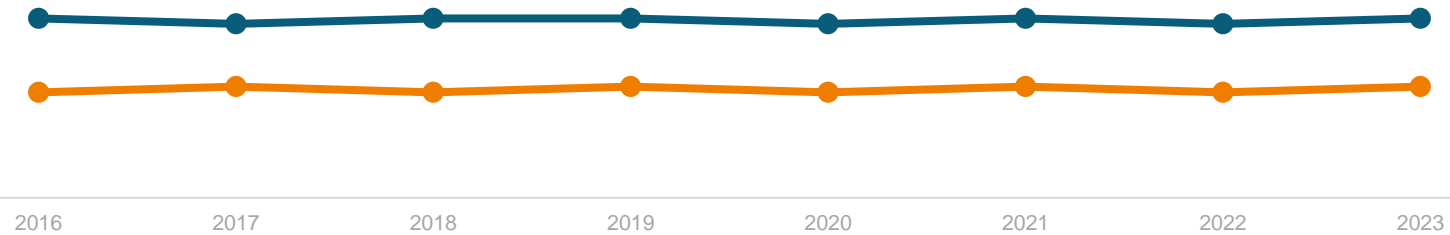
AUSTRIA
EU AVERAGE



Base: N=2,400 per year

DIY vs DIFM development over years

DIY
DIFM



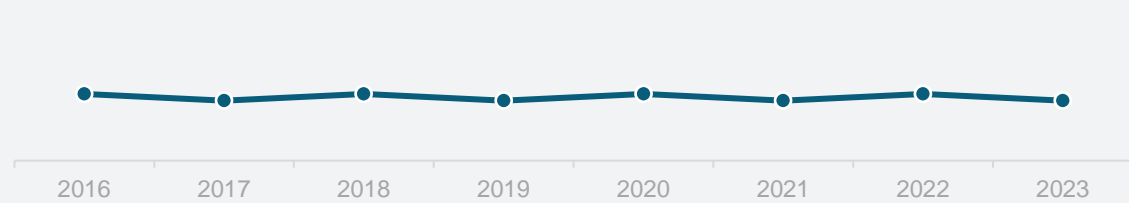
AUSTRIA

Lorem

DIY home improvement market

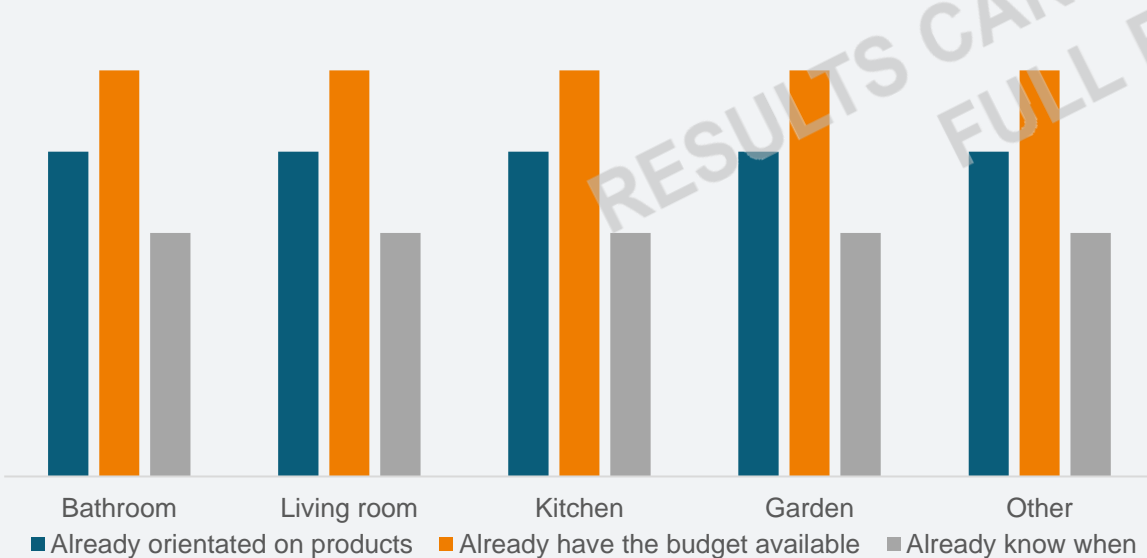
Who was involved in (performed) the work activities? – Myself/ my partner

% 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?

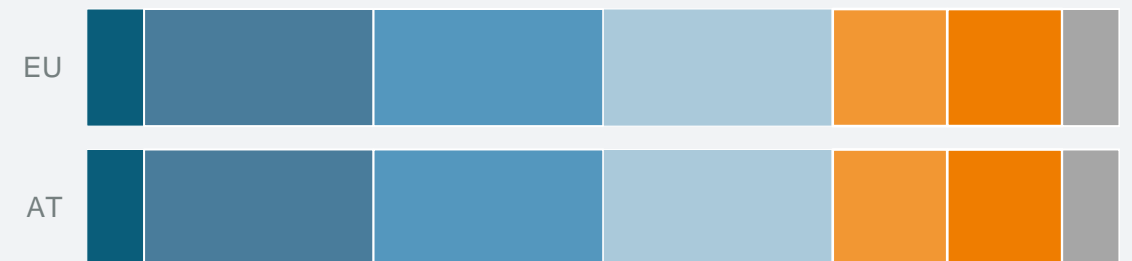
Exp. products | Exp. professionals | Unreliable professionals | No time | Don't like it | DK



Barriers to hiring a professional

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

Too exp. | No prof. | Too small job | Unreliable prof. | Can do it myself | Like doing it | DK



BELGIUM

Share of households that did a home improvement job

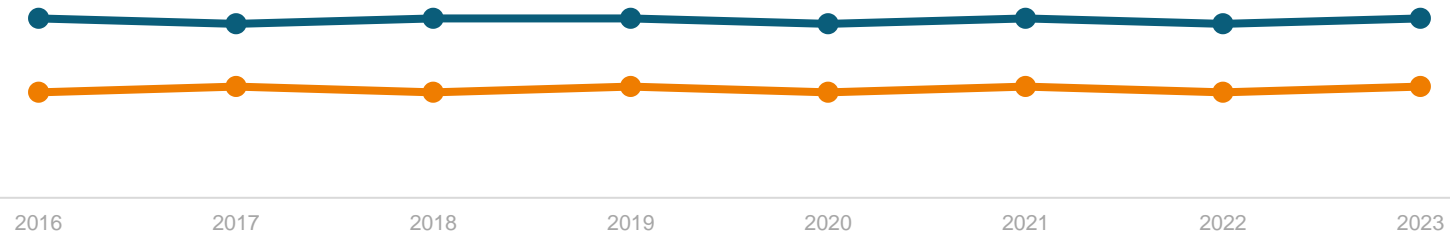
BELGIUM
EU AVERAGE



Base: N=2,400 per year

DIY vs DIFM development over years

DIY
DIFM



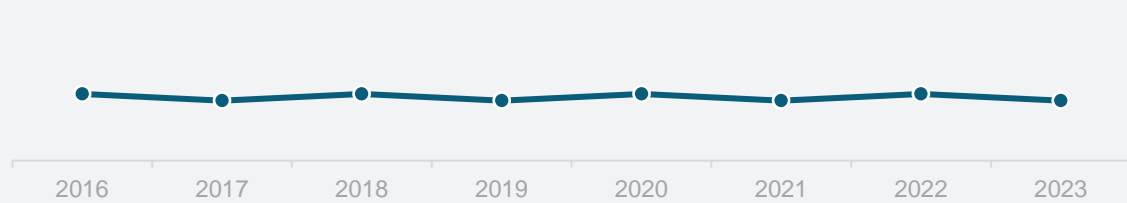
BELGIUM

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DIY home improvement market

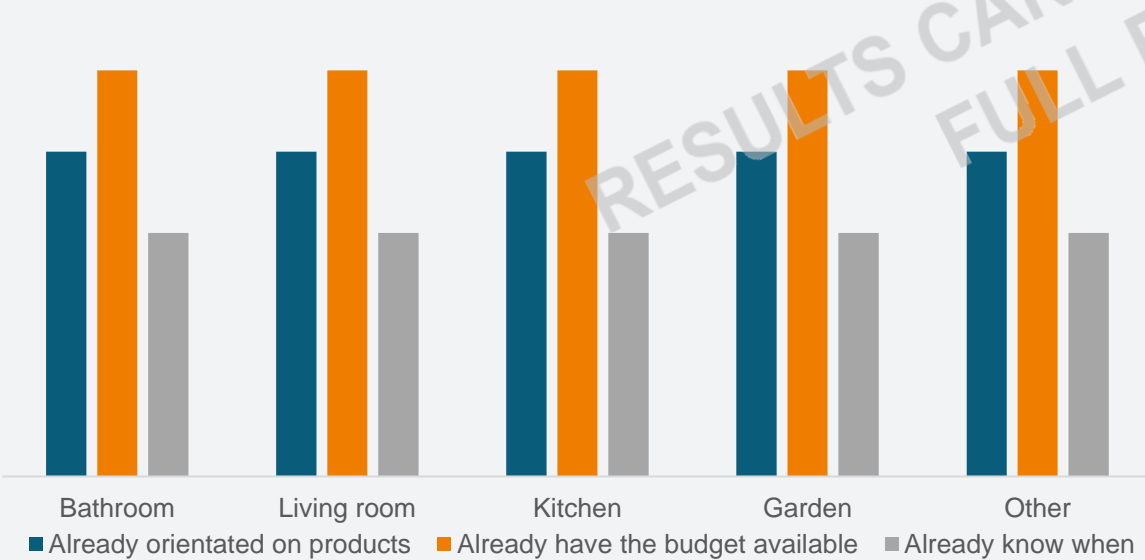
Who was involved in (performed) the work activities? – Myself/ my partner

% DIY



Planned home renovations

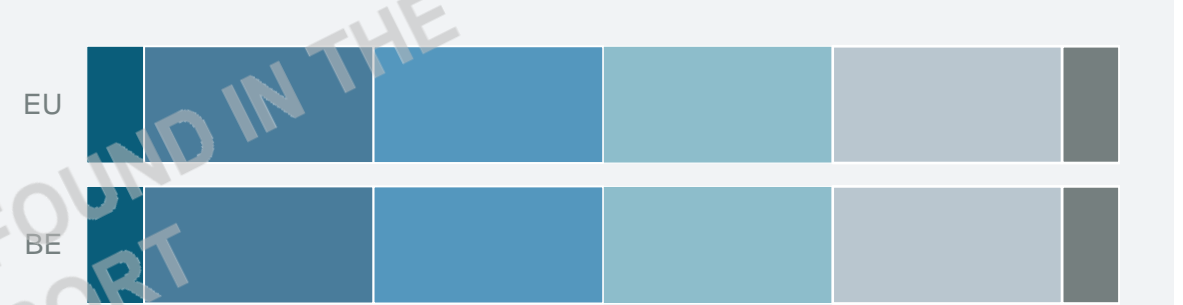
How far are you with planning your renovation?



Barriers to home improvement

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

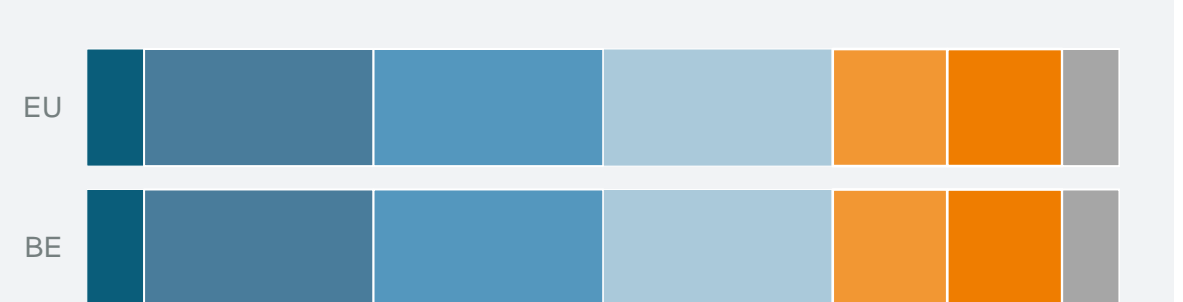
Exp. products | Exp. professionals | Unreliable professionals | No time | Don't like it | DK



Barriers to hiring a professional

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Too exp. | No prof. | Too small job | Unreliable prof. | Can do it myself | Like doing it | DK



DENMARK

Share of households that did a home improvement job

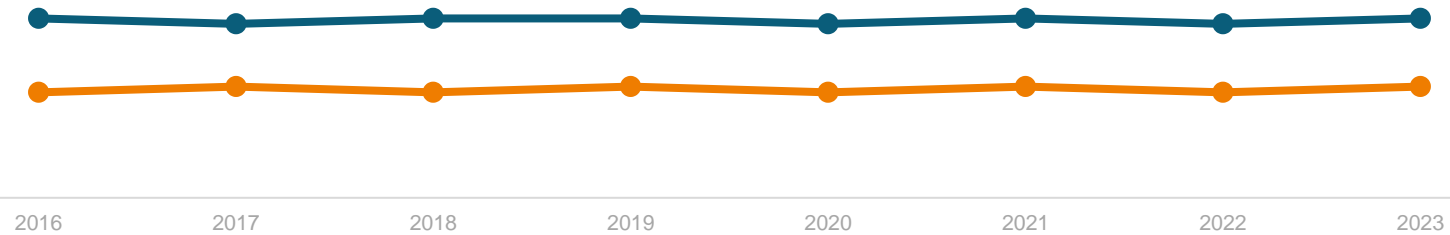
DENMARK
EU AVERAGE



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DIY vs DIFM development over years

DIY
DIFM



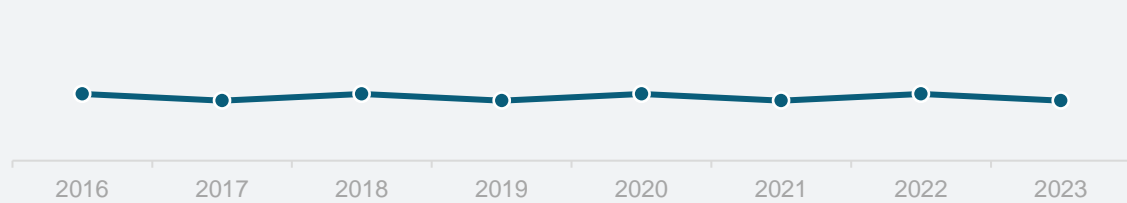
DENMARK

Lorem

DIY home improvement market

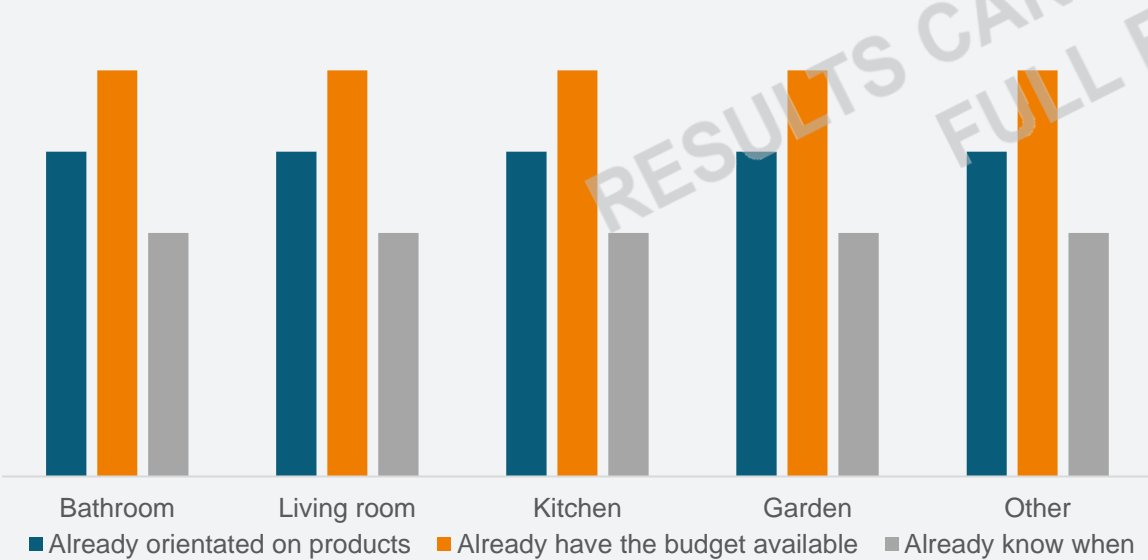
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% DIY



Planned home renovations

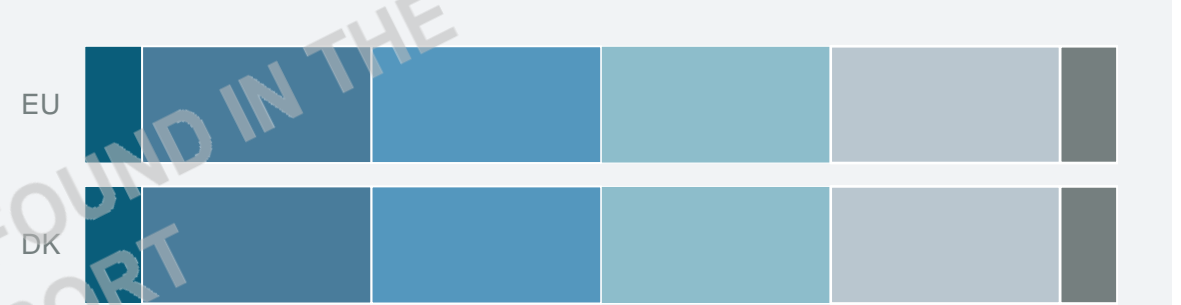
How far are you with planning your renovation?



Barriers to home improvement

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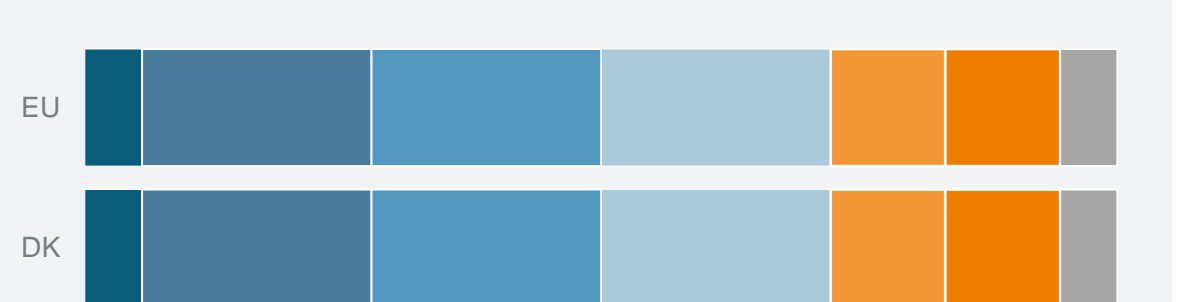
Exp. products | Exp. professionals | Unreliable professionals | No time | Don't like it | DK



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FRANCE

Share of households that did a home improvement job

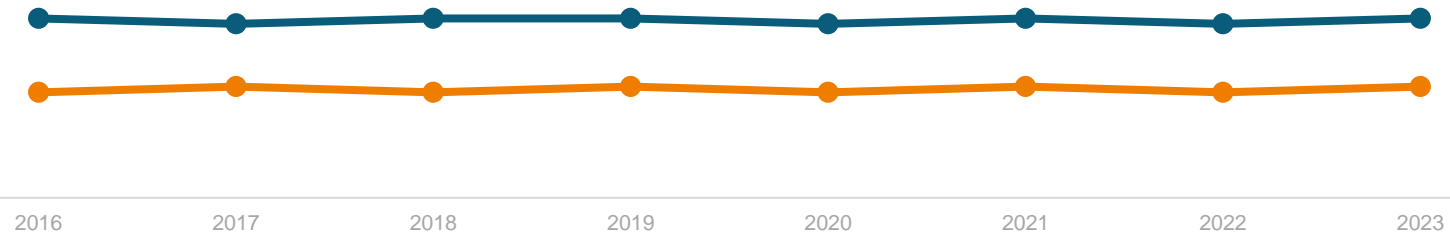
FRANCE
EU AVERAGE



Base: N=2,400 per year

DIY vs DIFM development over years

DIY
DIFM



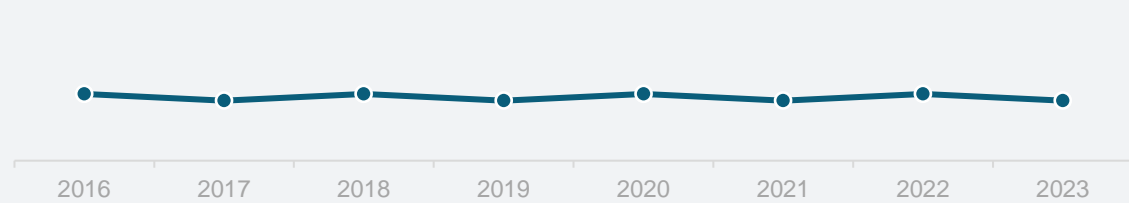
FRANCE

Lorem

DIY home improvement market

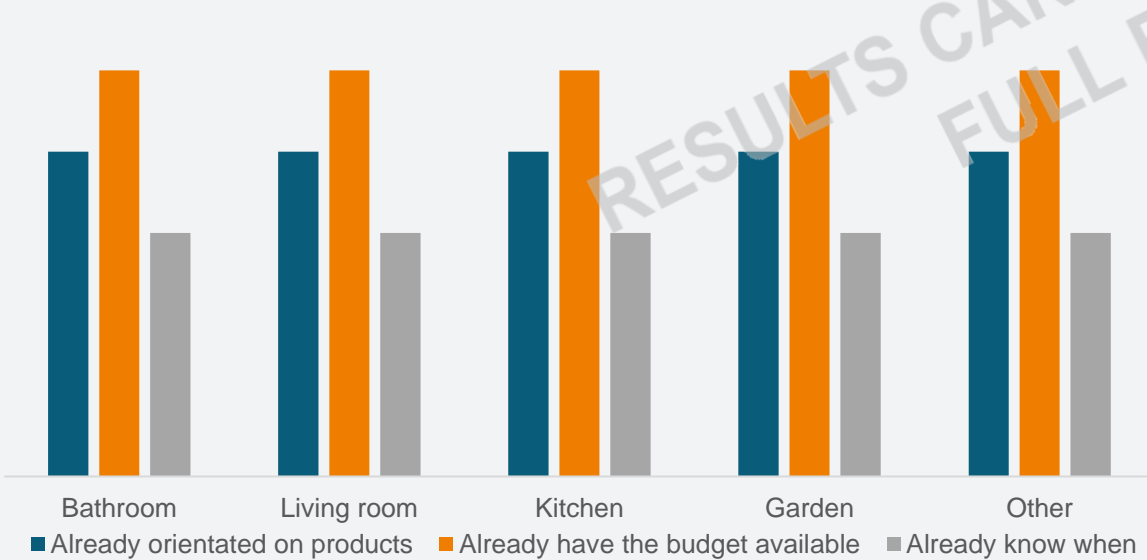
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GERMANY

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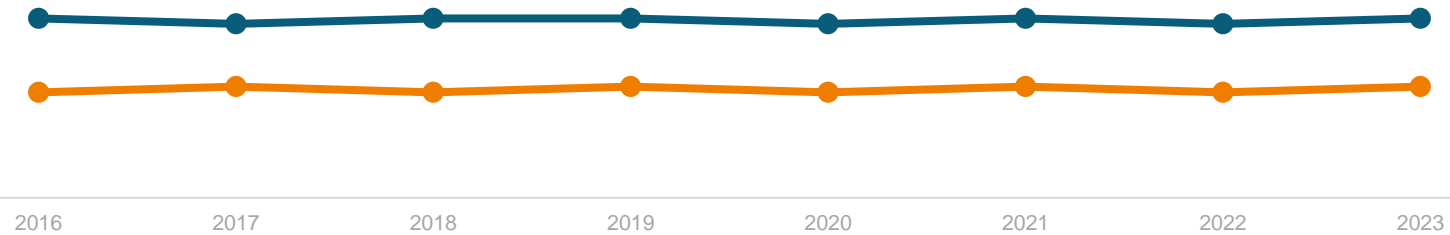
GERMANY
EU AVERAGE



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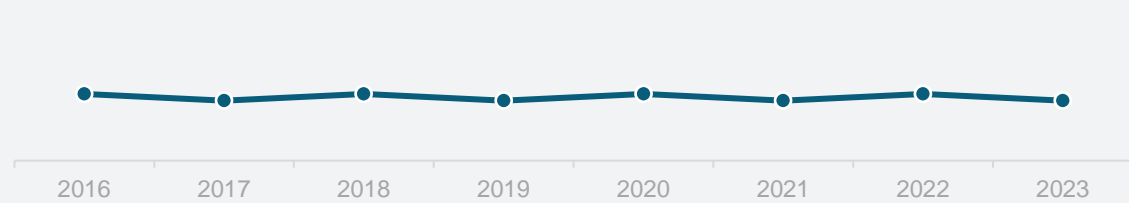
GERMANY

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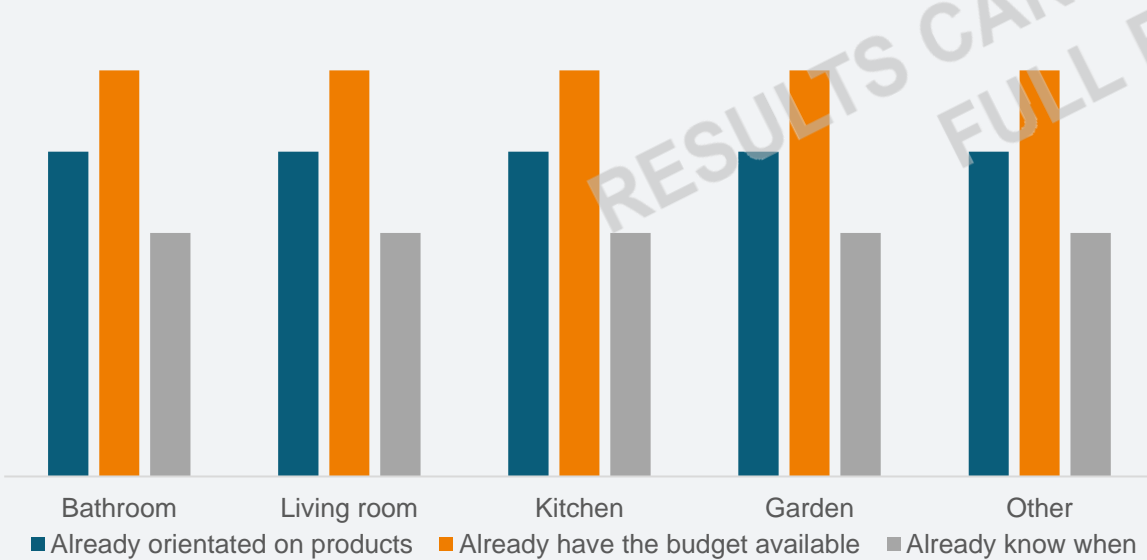
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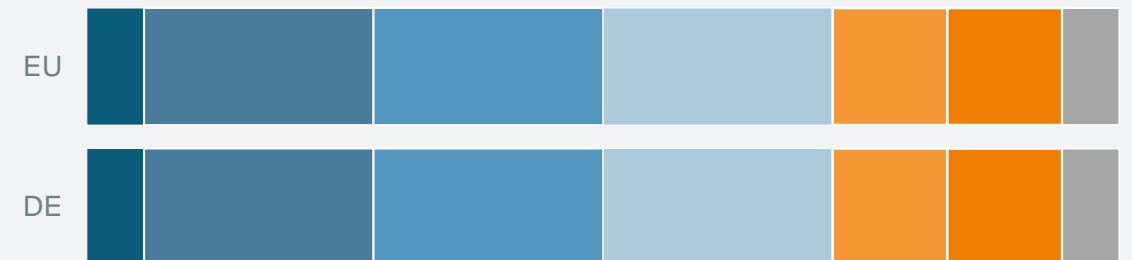
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ITALY

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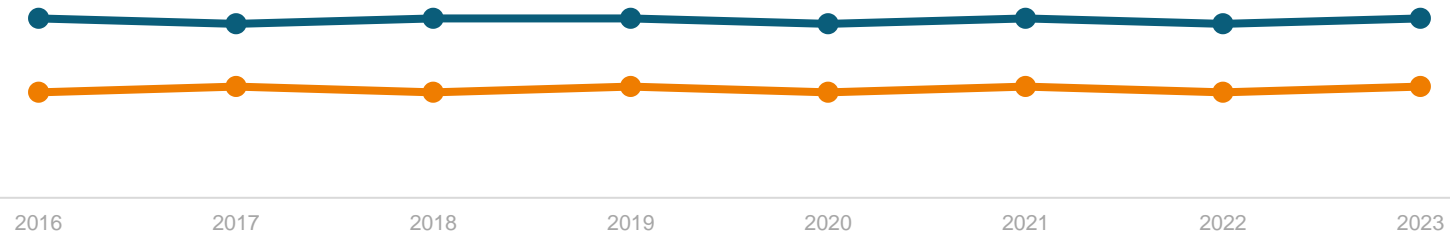
ITALY
EU AVERAGE



Base: N=2,400 per year

DIY vs DIFM development over years

DIY
DIFM



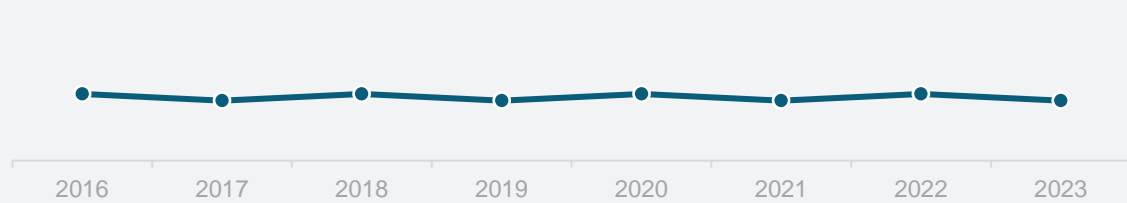
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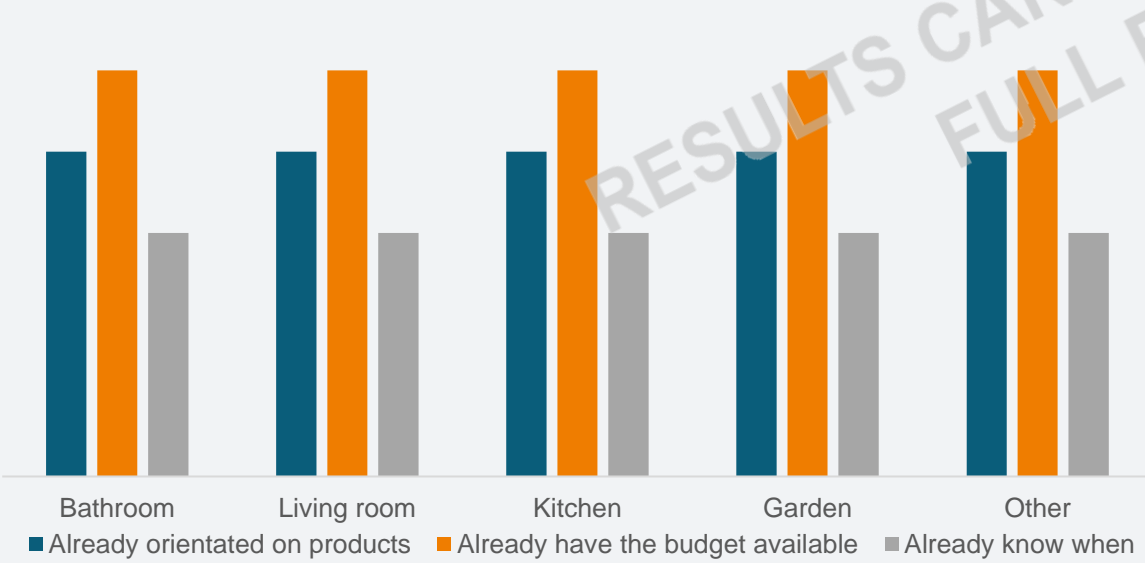
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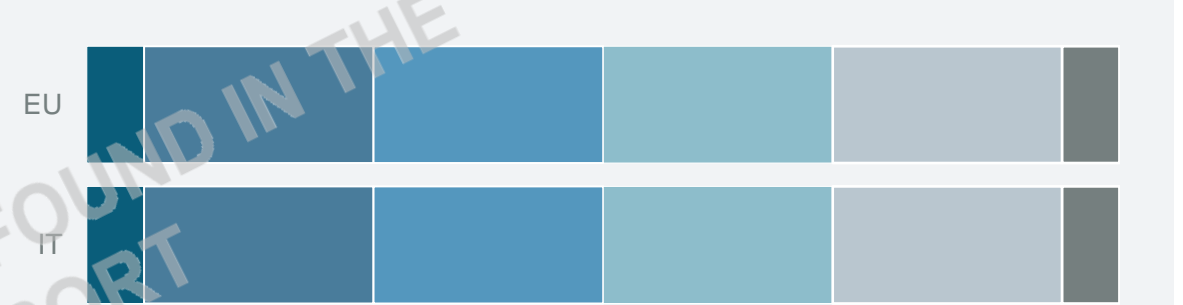
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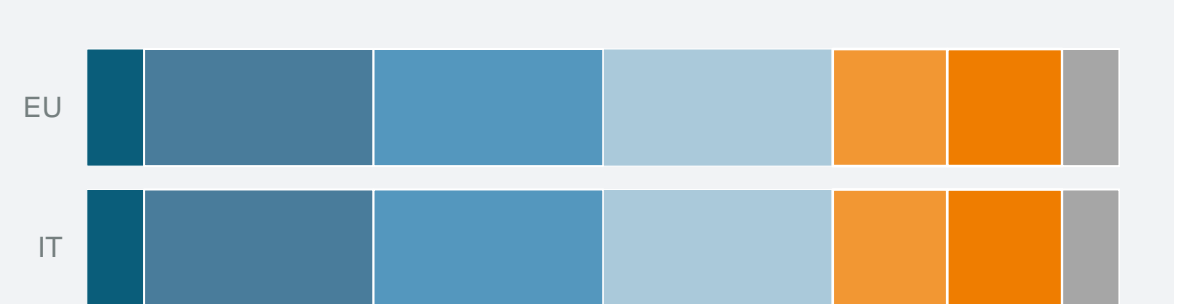
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NETHERLANDS

Share of households that did a home improvement job

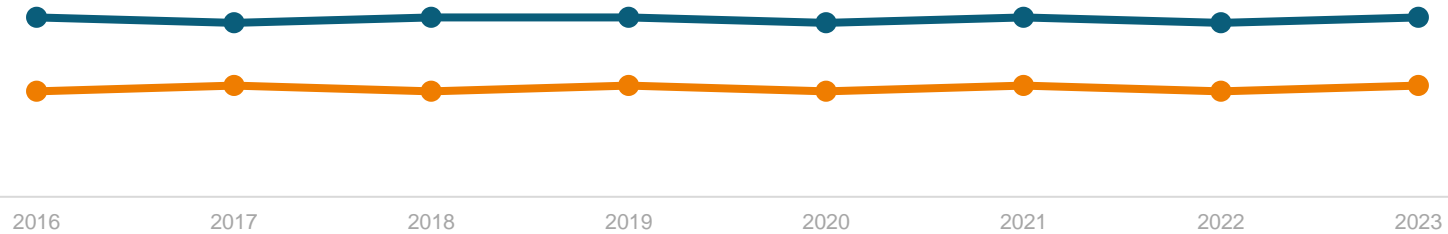
NETHERLANDS
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Base: N=2,400 per year

DIY vs DIFM development over years

DIY
DIFM



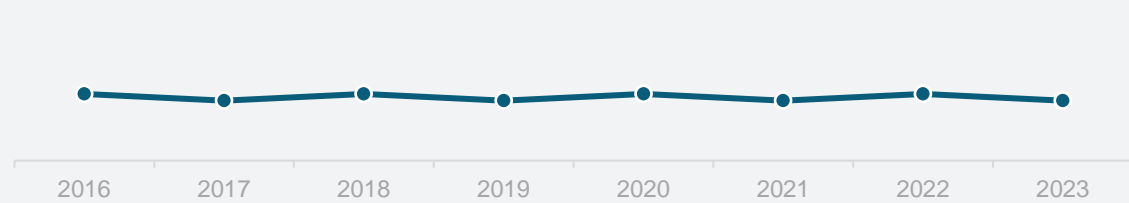
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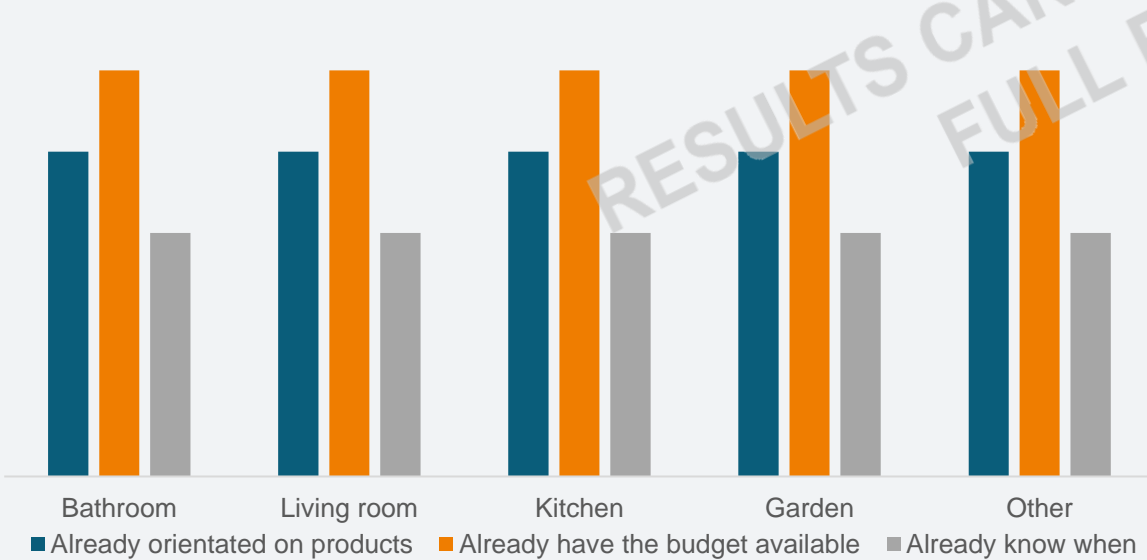
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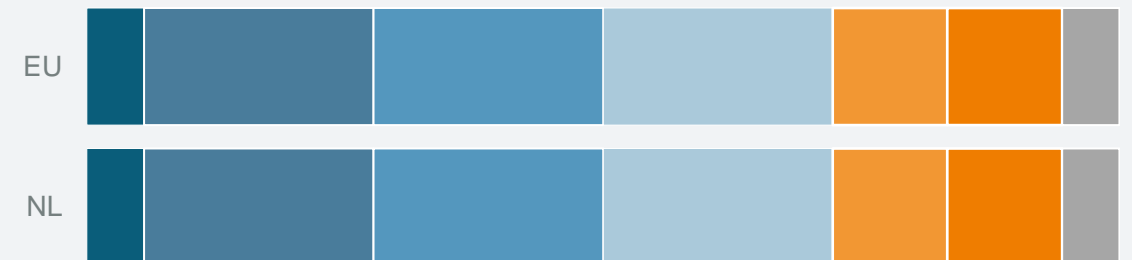
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POLAND

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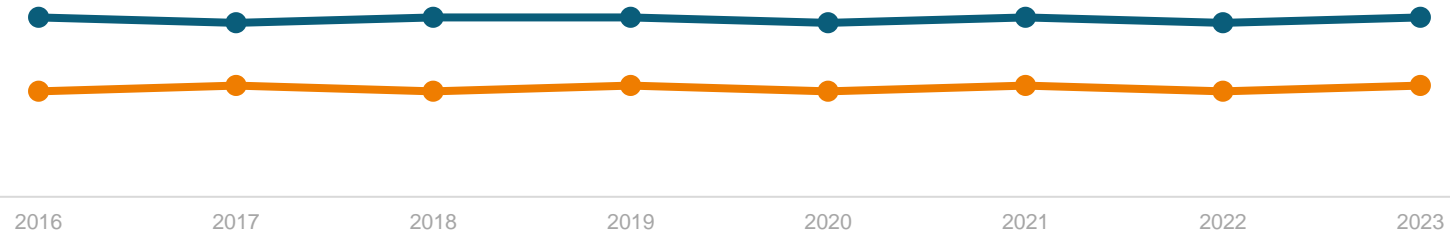
POLAND
EU AVERAGE



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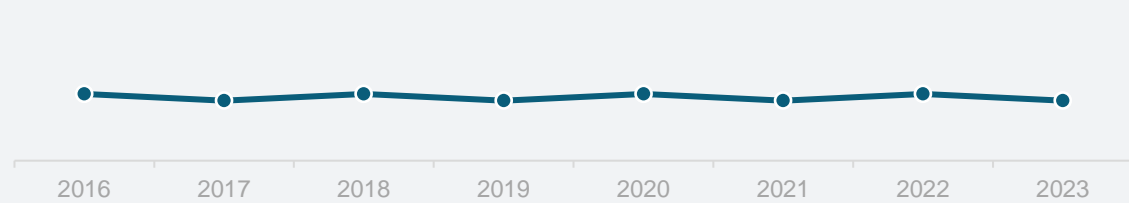
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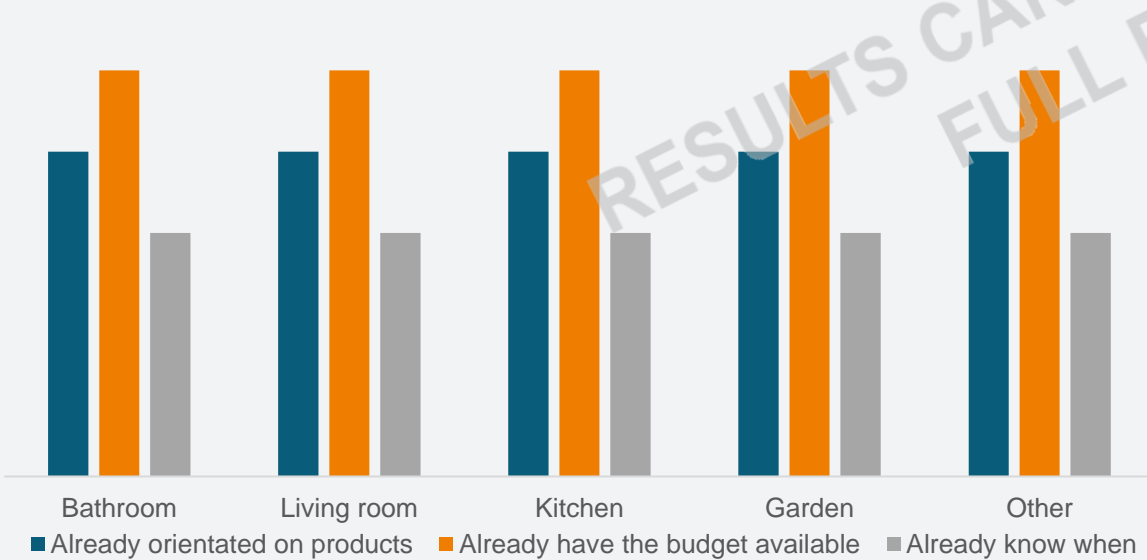
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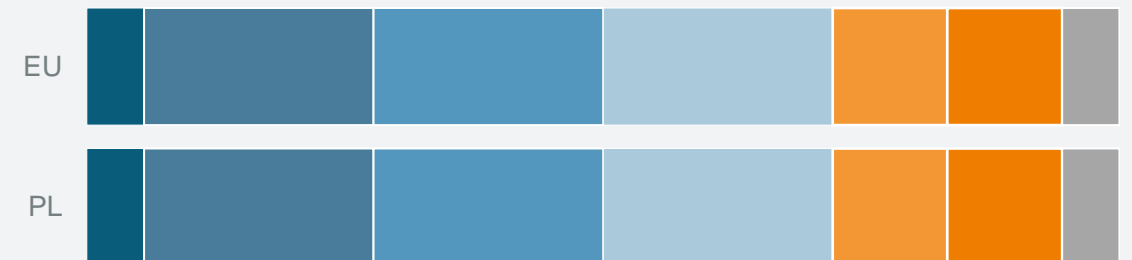
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SPAIN

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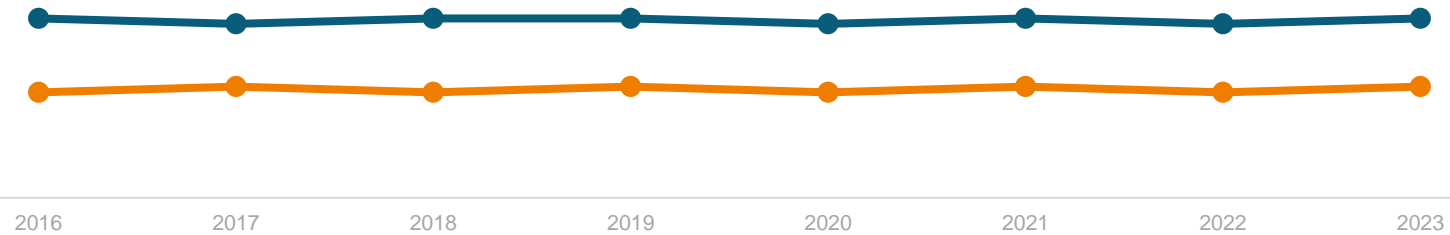
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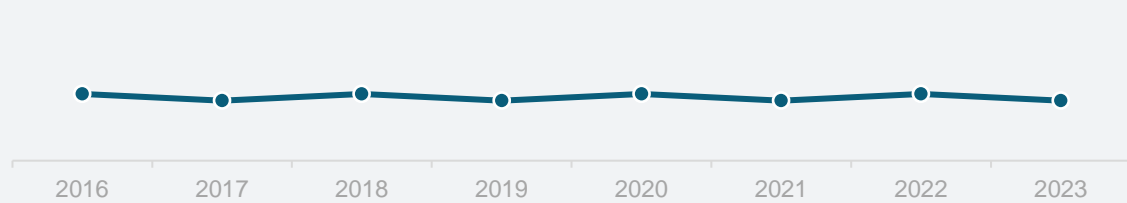
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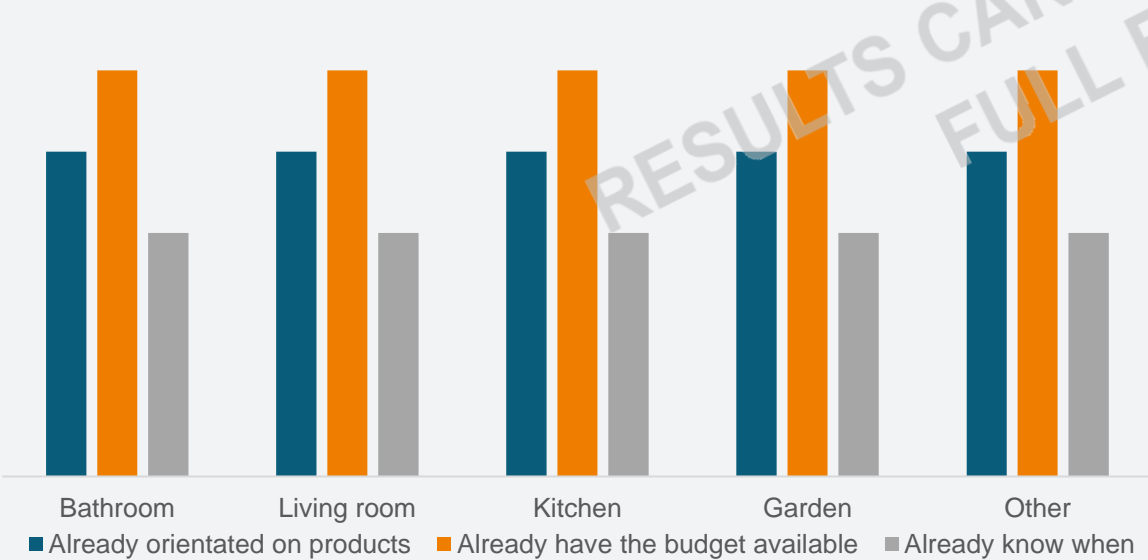
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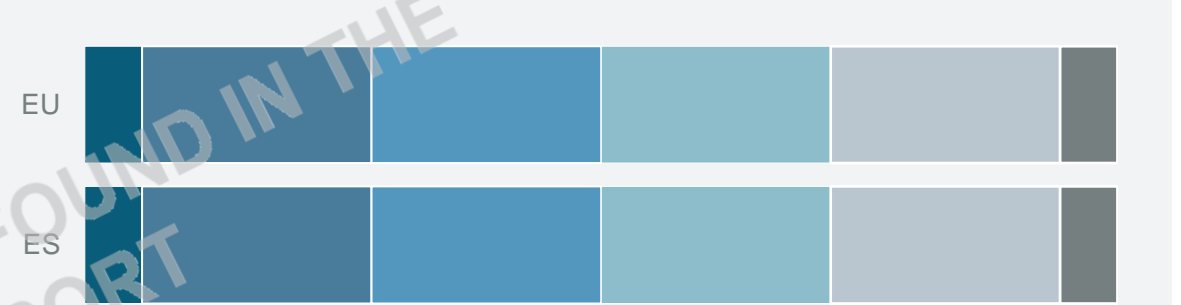
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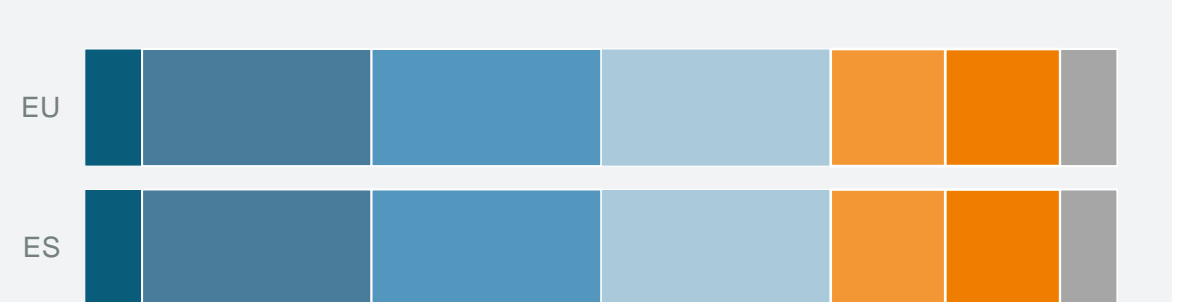
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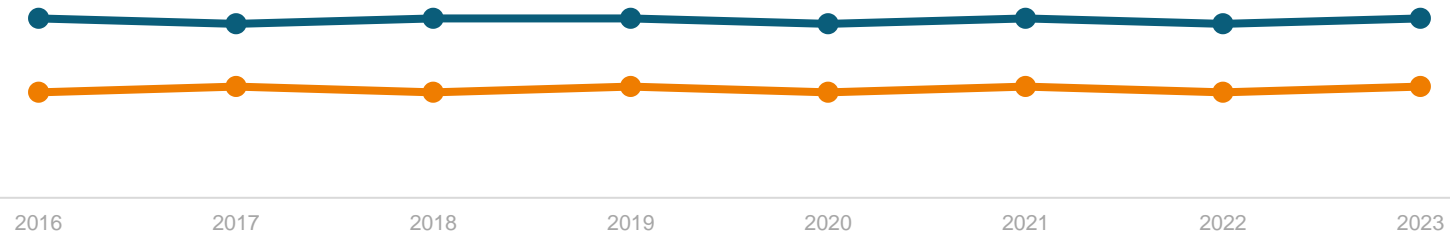
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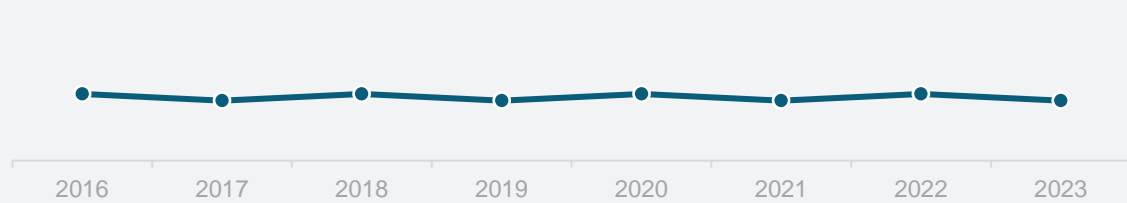
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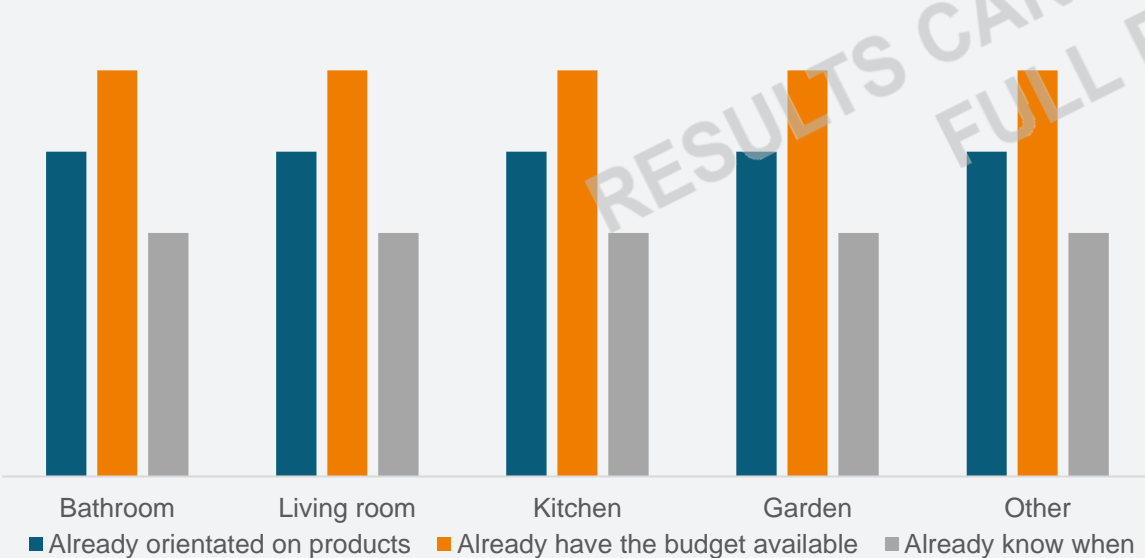
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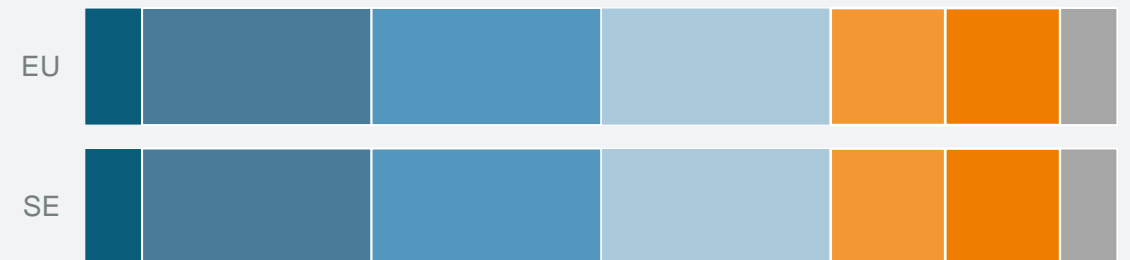
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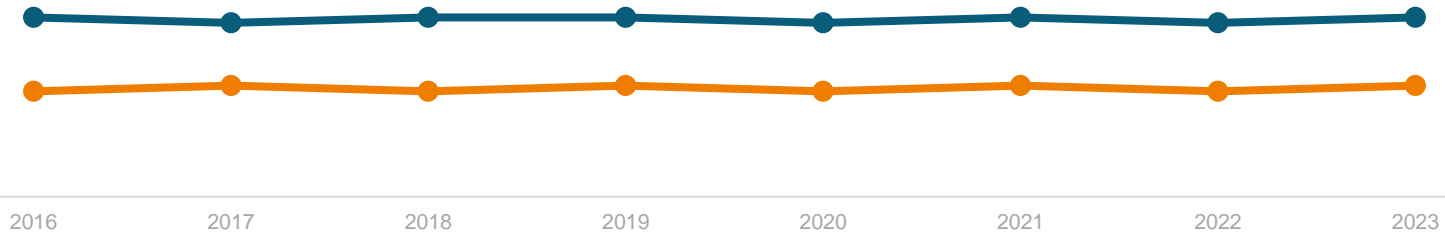
UK
EU AVERAGE



Base: N=2,400 per year

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DIFM



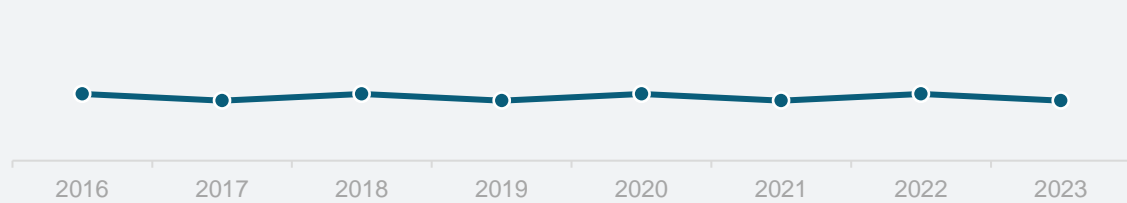
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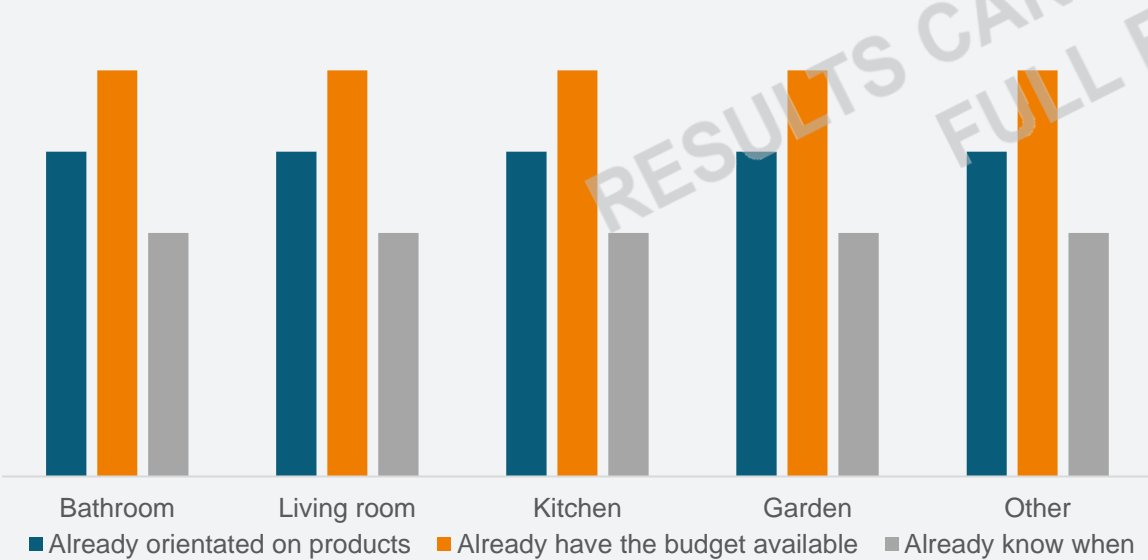
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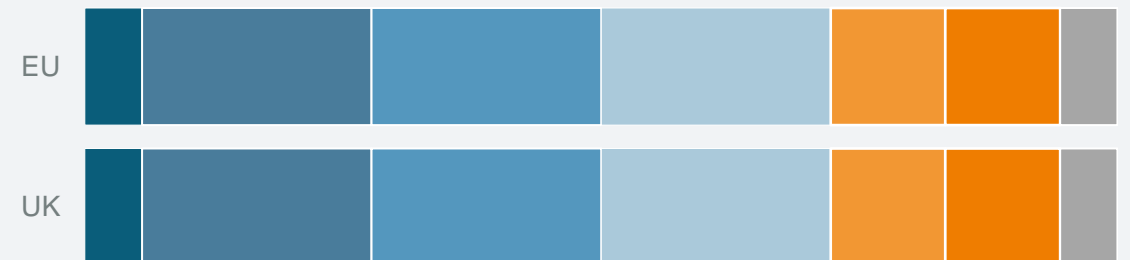
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KEY INSIGHTS

ECONOMIC DEVELOPMENTS

THEME: DIY VS. DIFM

EUROPEAN OVERVIEW

COUNTRY OVERVIEW

HOME IMPROVEMENT PER CATEGORY -

APPENDIX



Index

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APPENDIX



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+
49%	51%	Austria	26%	37%	37%
48%	51%	Belgium	27%	36%	37%
49%	51%	Denmark	33%	33%	34%
48%	52%	France	26%	35%	39%
49%	51%	Germany	24%	36%	40%
50%	50%	Italy	26%	35%	39%
49%	51%	Netherlands	24%	36%	40%
48%	52%	Poland	33%	33%	34%
49%	51%	Spain	27%	33%	41%
50%	50%	Sweden	27%	33%	41%
49%	51%	UK	26%	37%	37%

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)									

USP Marketing Consultancy

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