



European Home Improvement Monitor Q1 2024

Theme: Consumer needs & willingness to invest in sustainability

April 2024

Index

About The Research

Economic developments

Spending per quarter

Outlook

Theme part

Orientation

Sustainability

Country Overview

Home improvement per category



About European Home Improvement Monitor

THE GOAL

To check and track the behaviour and trends in the European home improvement market. This is done 4 times per year, by means of 6600 online interviews (per quarter) with consumers, divided over 11 major European markets.

THE RESEARCH TOPICS

Base part: European developments of the home improvement market: product category penetration, spending, moment of brand selection, etc.

Quarterly theme part topic in 2024:

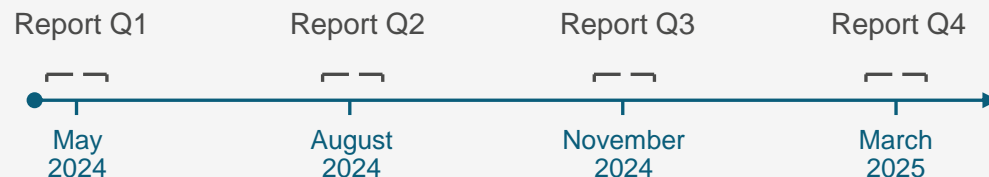
Q1: Sustainability - Needs & willingness to invest in sustainability

Q2: Purchase channels - Online performance of DIY stores

Q3: Branding - Evolution of private labels

Q4: Do It Yourself or Do It For Me - Plans and expectations for next year

THE TIMELINE



COUNTRY SCOPE

600 online interviews per quarter per country among consumers
Annually, **26,400** successful online interviews

Background characteristics of the interviewed respondents can be found in the appendix

Insights are provided for **11** European countries

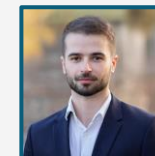


PROJECT TEAM



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

WHY EUROPEAN HOME IMPROVEMENT MONITOR?



Digitalization, is rapidly changing the way consumers **orientate** and how they **purchase** home improvement products. This trend makes “pull marketing” much more important. The consumer becomes more and more decisive in the DMU.

The European Home Improvement Monitor provides key information on how consumers **orientate** themselves **on your category**. How digital are they and what are **differences by country**. Need-to-know Information which is vital for a good marketing strategy.



Our clients partner with us to implement trends and research questions in the monitor.

The European Home Improvement Monitor is a **co-makership** between our clients and USP. **Together we decide which trends to investigate**. Each quarter a key trend will be investigated and reported.

Knowing where, how and when these trends become relevant is **key market intelligence input** for **strategic decision making**.



The European Home Improvement Monitor is conducted in **11 countries with the same methodology and questionnaire**. Not only the trends can be compared country by country, but also **by product category**.

Our customers are often Multi-national companies who need to receive comparable data for the countries in which they are active. We deliver a **cross-country comparison**.

This information is highly valuable to assess market conditions and sales feedback.

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

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

Male	Female		18-34	35-54	55+
48%	52%	Austria	26%	37%	37%
48%	51%	Belgium	27%	36%	37%
49%	51%	Denmark	26%	35%	38%
48%	52%	France	26%	35%	39%
49%	51%	Germany	24%	36%	40%
48%	52%	Italy	23%	37%	40%
49%	51%	Netherlands	27%	37%	37%
47%	53%	Poland	33%	33%	34%
49%	51%	Spain	26%	39%	35%
50%	50%	Sweden	27%	33%	40%
49%	51%	UK	29%	35%	36%
[GENDER]			[AGE]		

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)								

Theme questions

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



Orientation:

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

Theme questions

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

Sustainability:

- To what extent are you interested in improving the energy efficiency of your home?
- Which of the following sustainability improvements would you be interested in applying in your house?
- What are the main drivers for more sustainability improvements to your home?
- What are the main barriers for you to take more sustainability improvements for your home?
- When buying products in a DIY store, do you care about buying environmentally sustainable products?
- When buying DIY products, what are the most important sustainability aspects to consider?
- How important are sustainability aspects when purchasing the following products?
- Which **DIY store** do you associate the most with sustainability?
- Which **manufacturer** of home improvement products do you associate the most with sustainability?
- To what degree is it important for you that a DIY store/DIY product brand is involved in sustainability initiatives?
- What type of heat pump do you own and plan to purchase?
- What type of other adjustments did you/do you expect to have related to the installation of the heat pump in your house?
- Looking forward to the months April-June/the next 12 months, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than in the same period last year?
- To what degree do you expect to spend more or less money on home improvement in April-June/the next 12 months compared to the same period last year?



Index

About The Research

Economic developments

Spending per quarter

Outlook

Theme part

Orientation

Sustainability

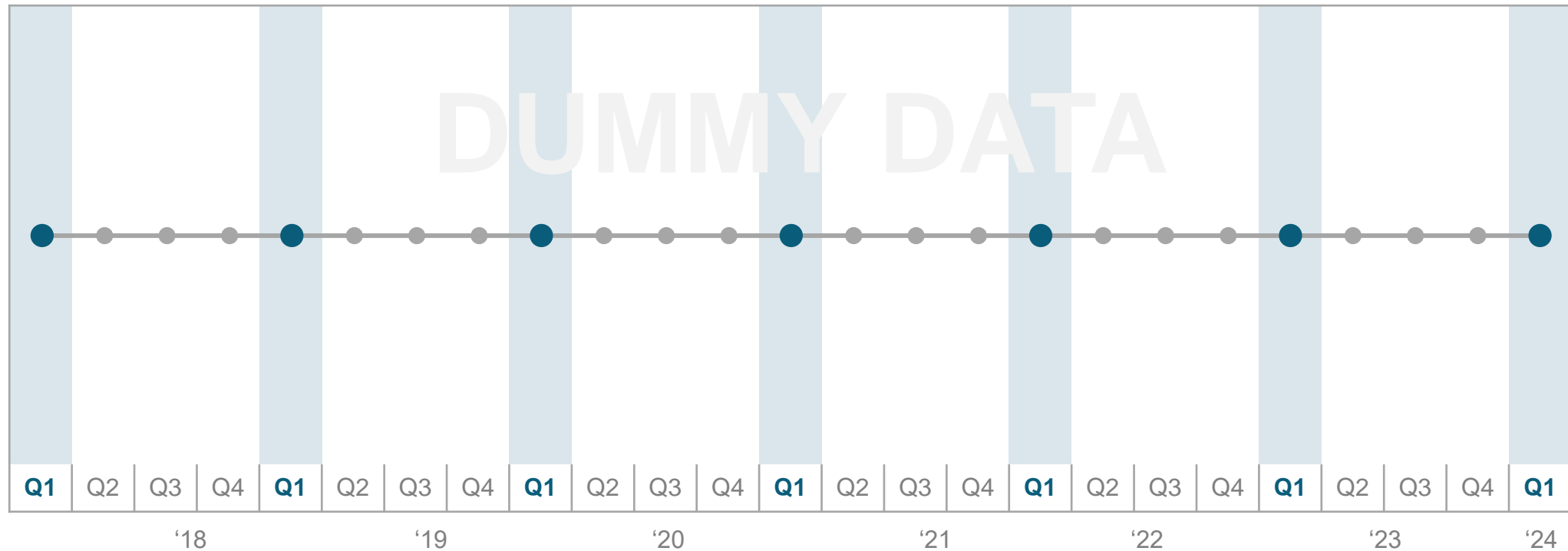
Country Overview

Home improvement per category



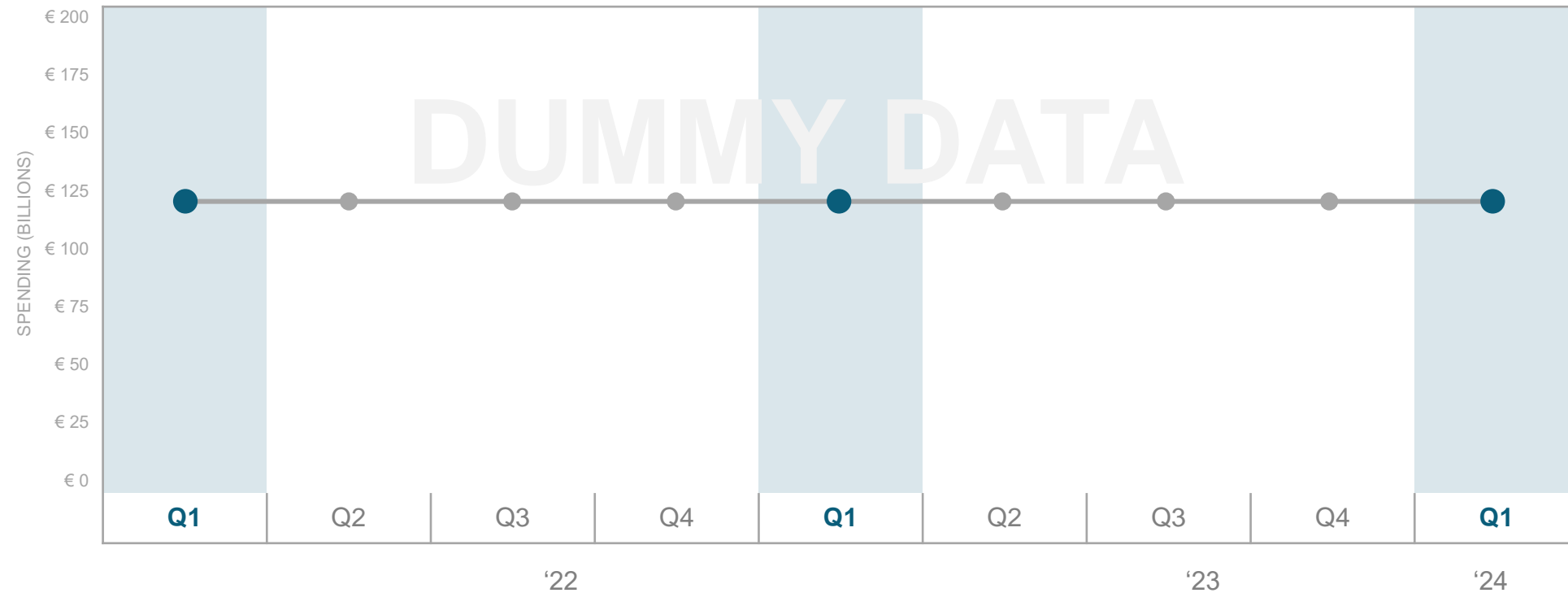
Lorem ipsum dolor sit amet, consectetur adipiscing elit.

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



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

European spending on labour + material 2024 Q1



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

Index

About The Research

Economic developments

Spending per quarter

Outlook

Theme part

Orientation

Sustainability

Country Overview

Home improvement per category

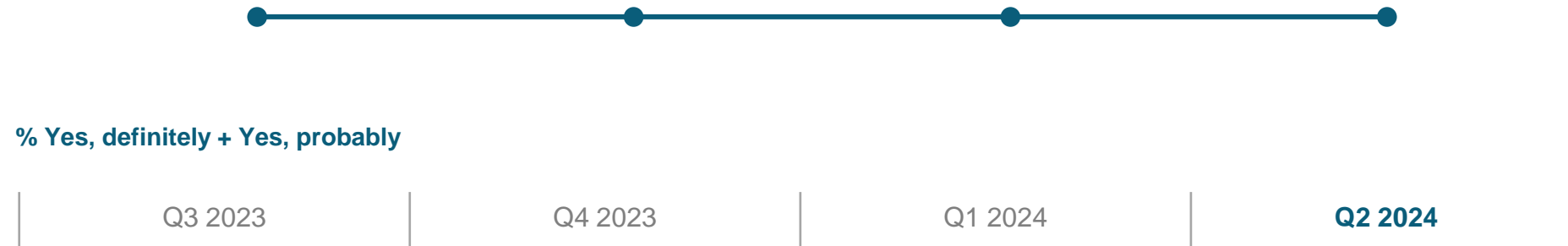


Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Plans in the next 30 days

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

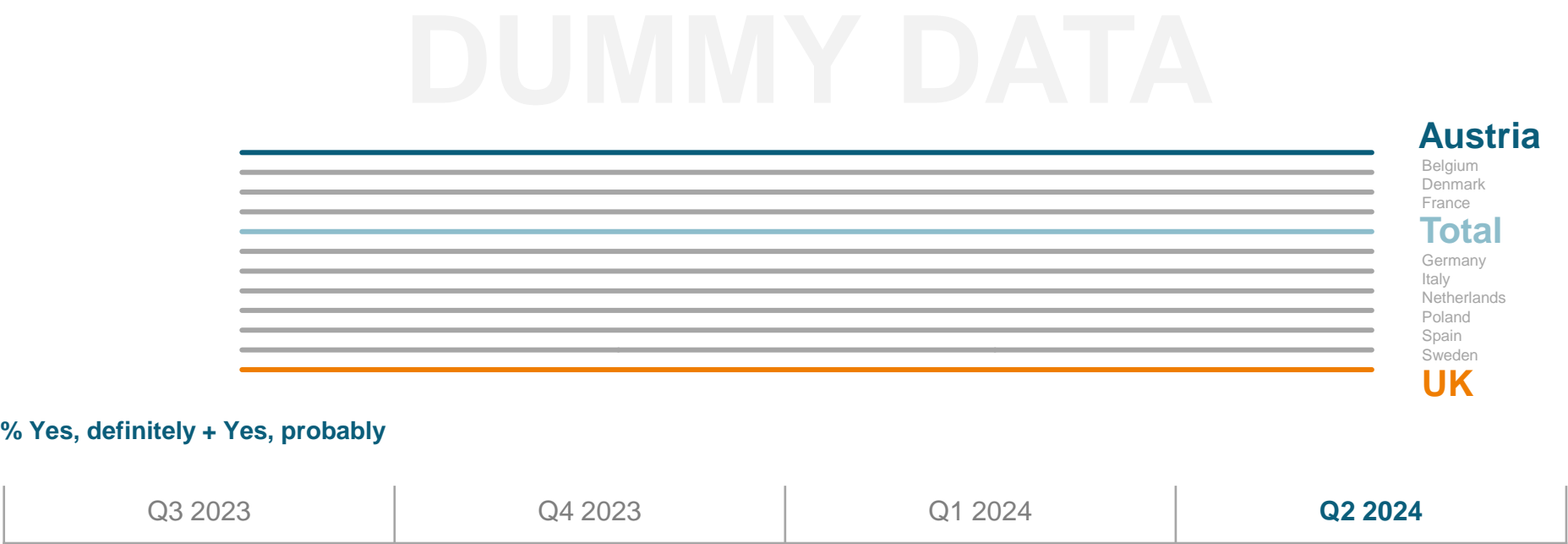
DUMMY DATA



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Plans in the next 30 days – by country

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

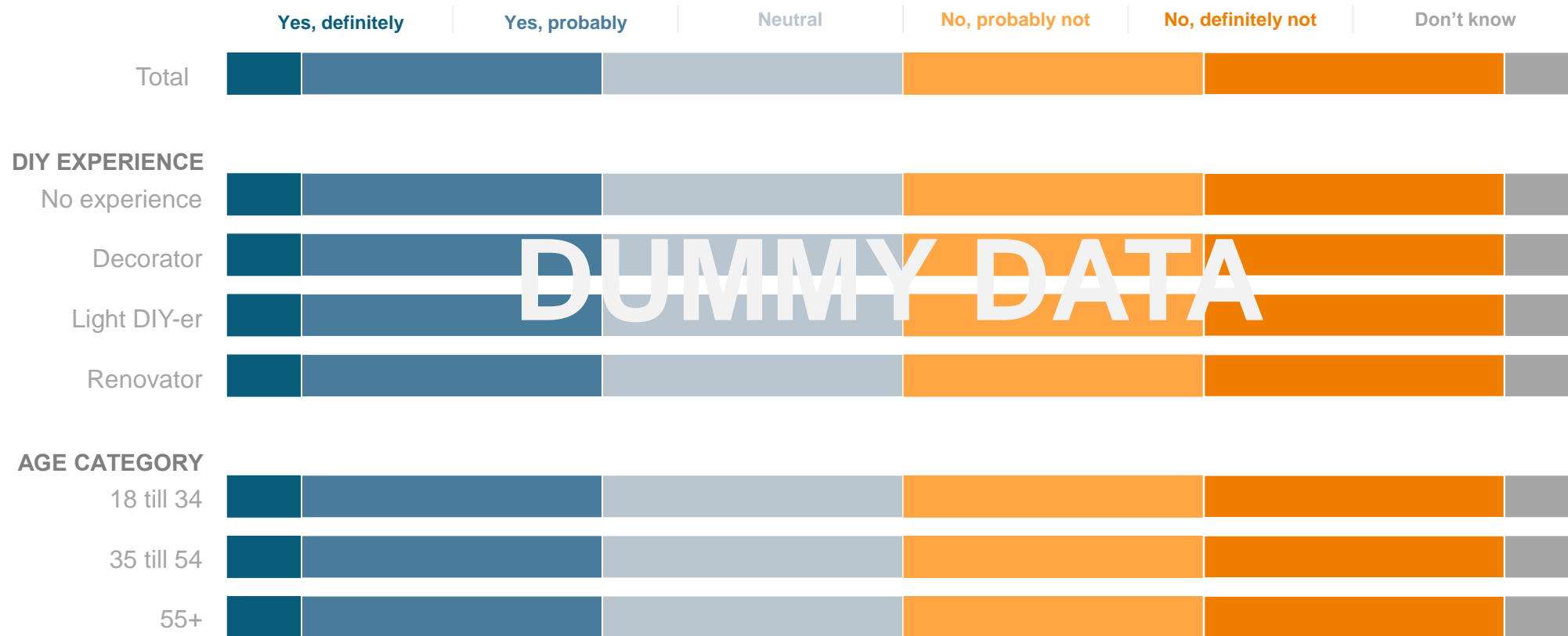


Base: N=6,669

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Plans in the next 30 days – by segment

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

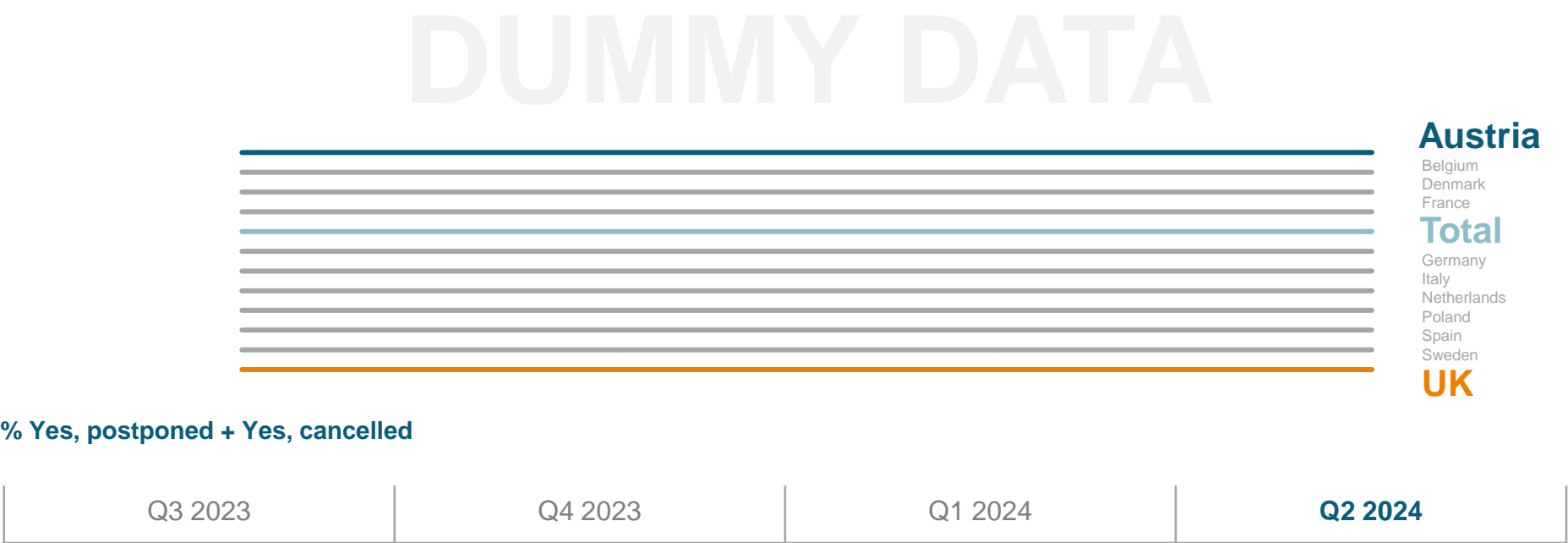


Base: N=6,669
Values below 5% are not labelled

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

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?

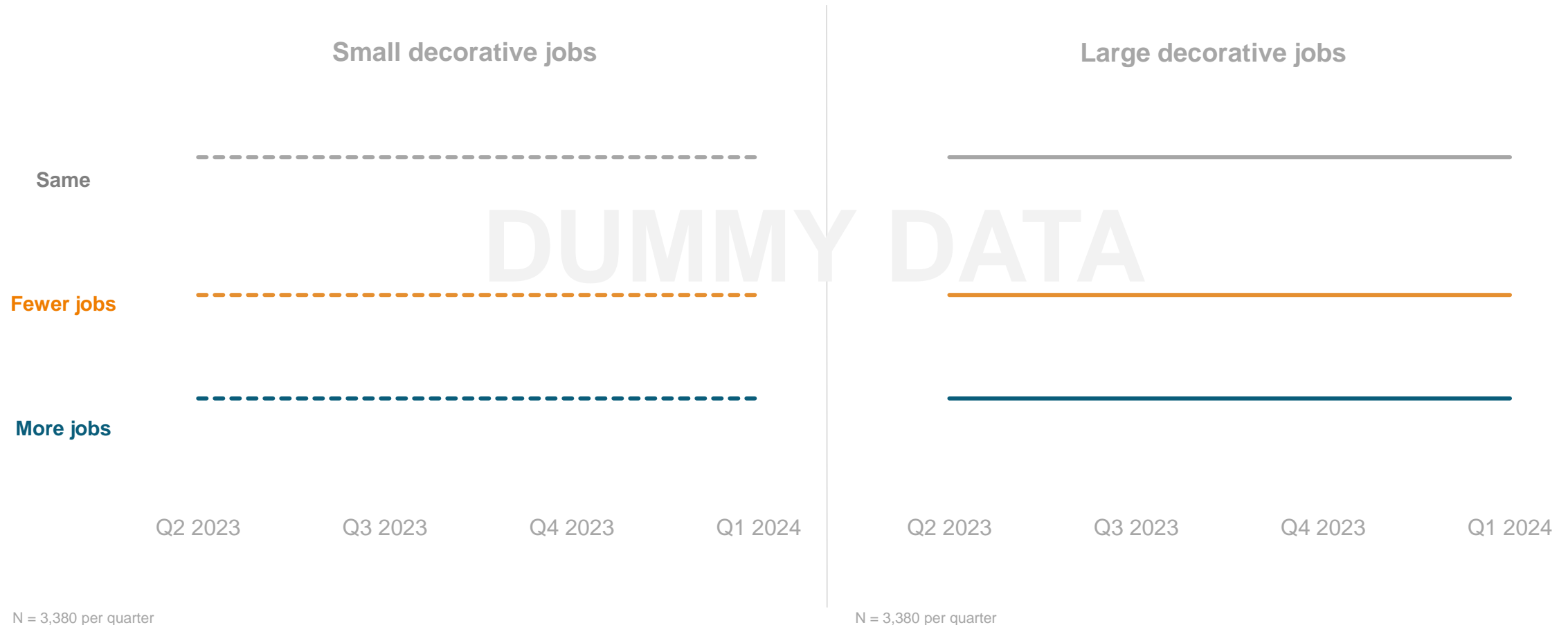


Base: N=6,669

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Outlook on decorative jobs compared to the same period in 2023

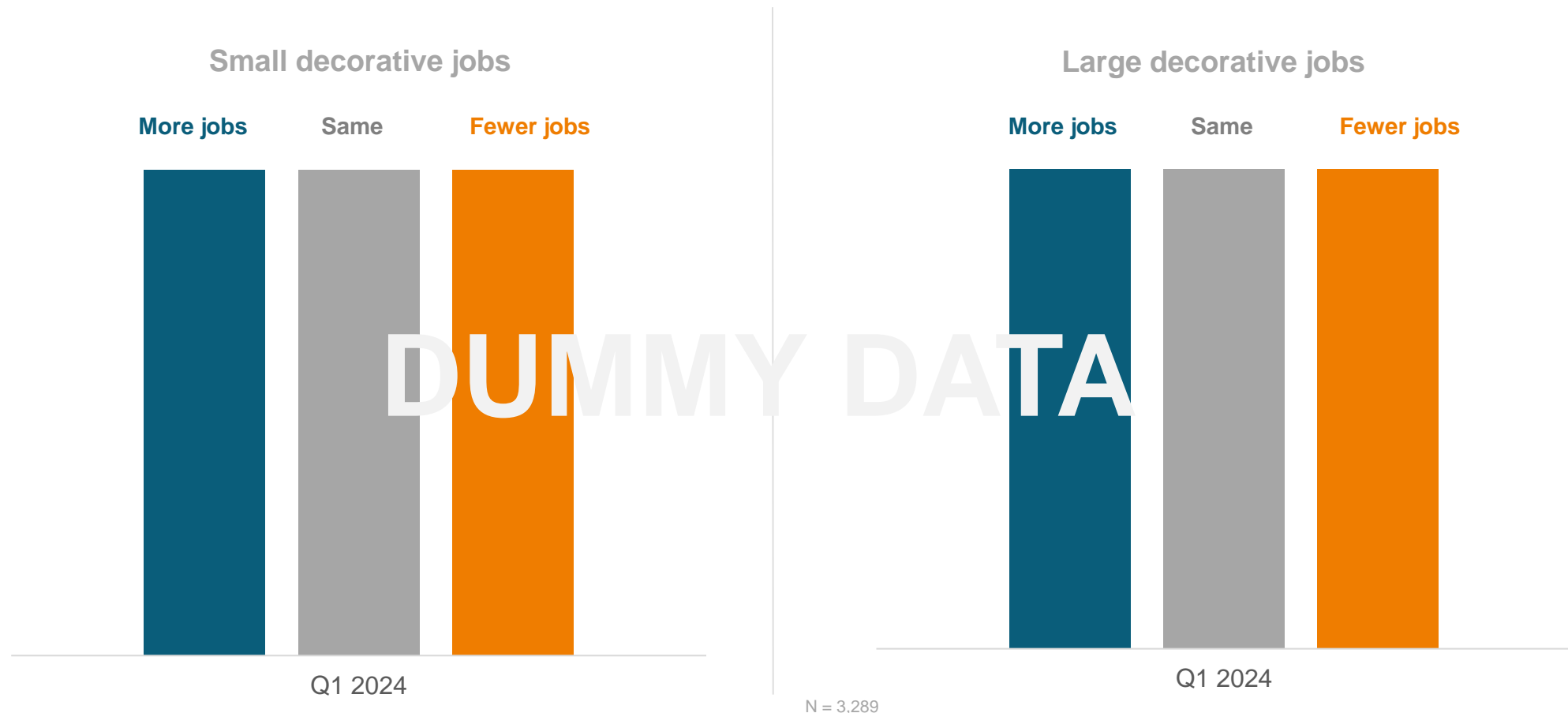
Looking forward to the months April-June, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than the same period last year?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Outlook on decorative jobs compared to the same period in 2023

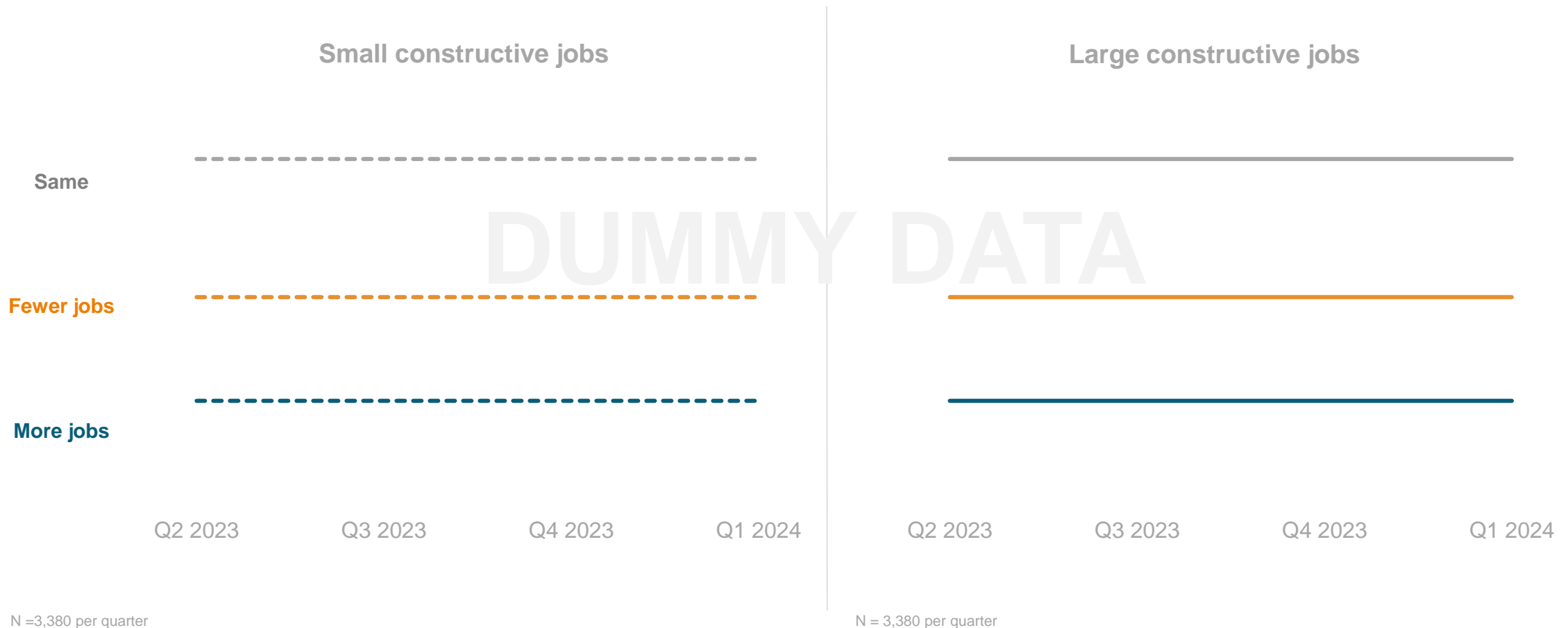
Looking forward to the next 12 months, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than the same period last year?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Outlook on constructive jobs compared to the same period in 2023

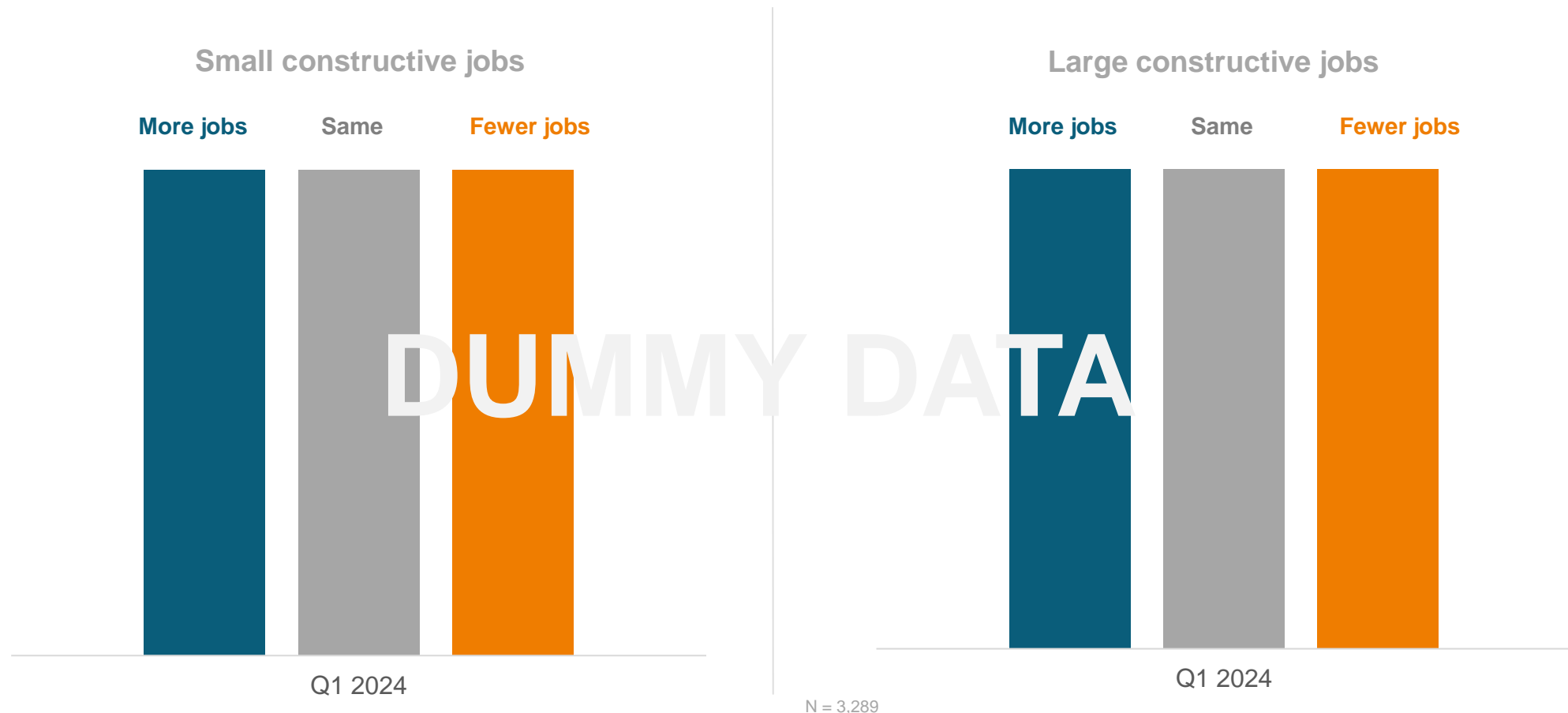
Looking forward to the months April-June, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than the same period last year?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Outlook on constructive jobs compared to the same period in 2023

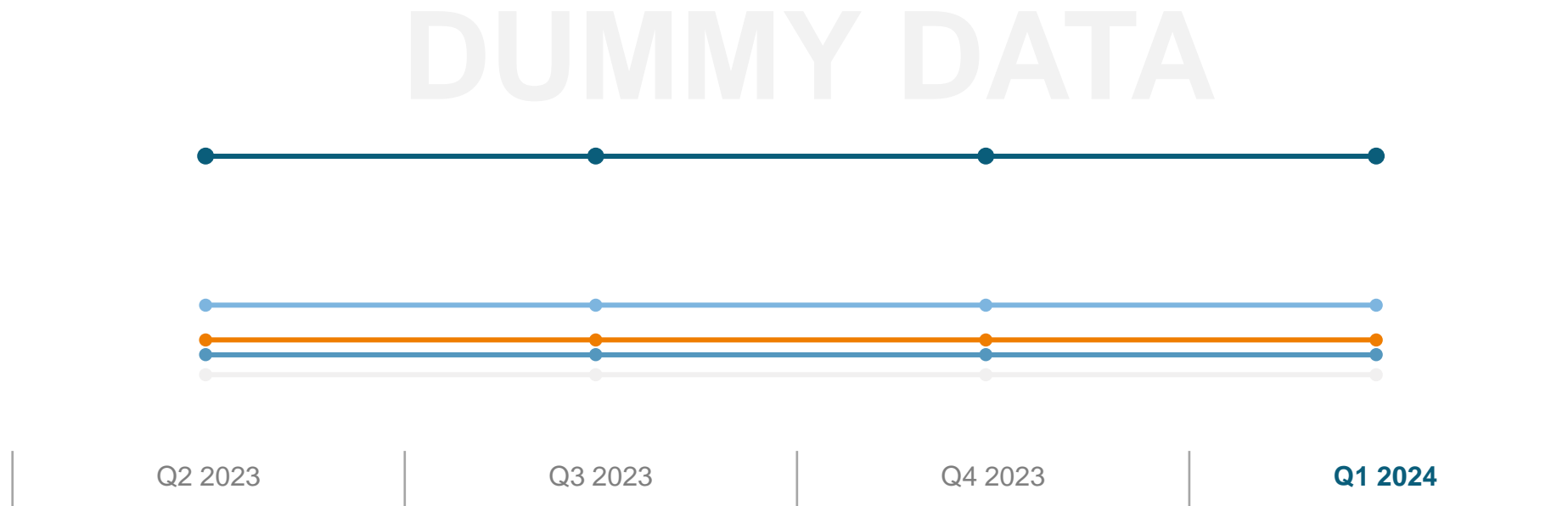
Looking forward to the next 12 months, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than the same period last year?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Cancellation reasons

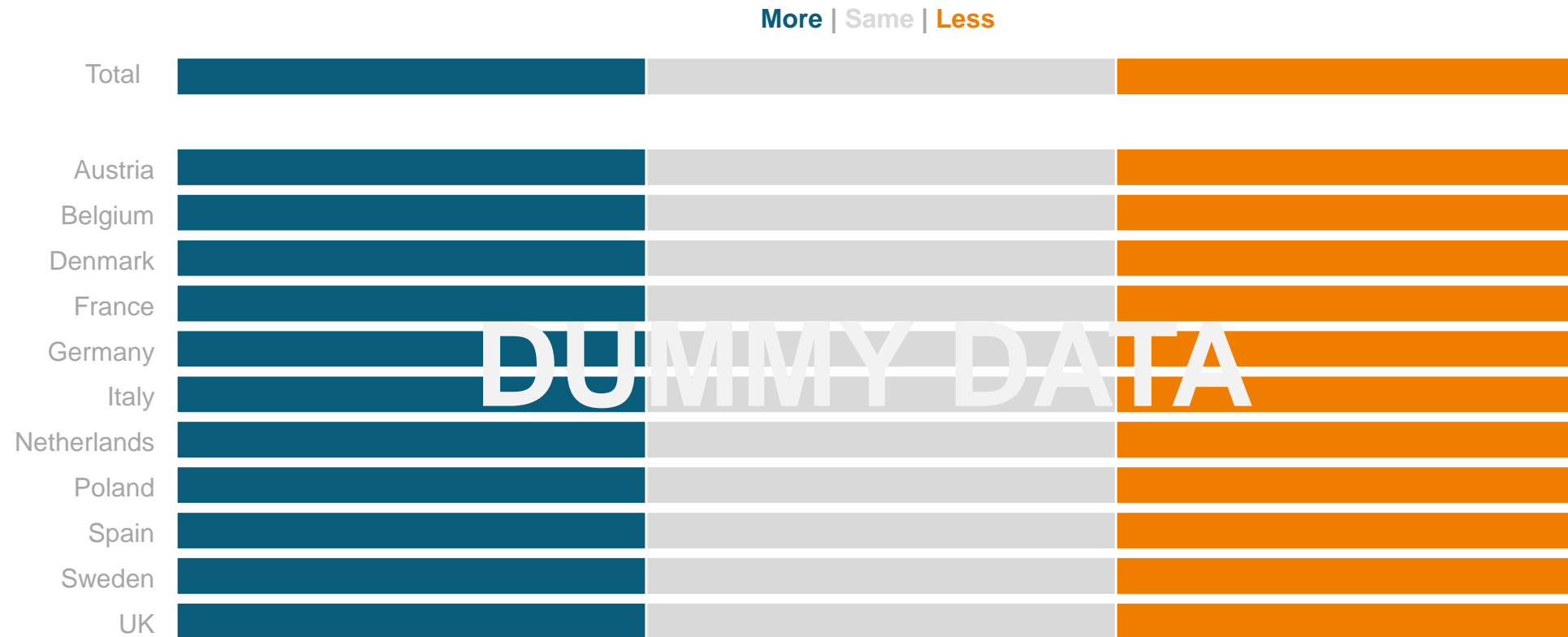
Why did you postpone or cancel your home improvement, repair or maintenance project?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Spending on improvement jobs

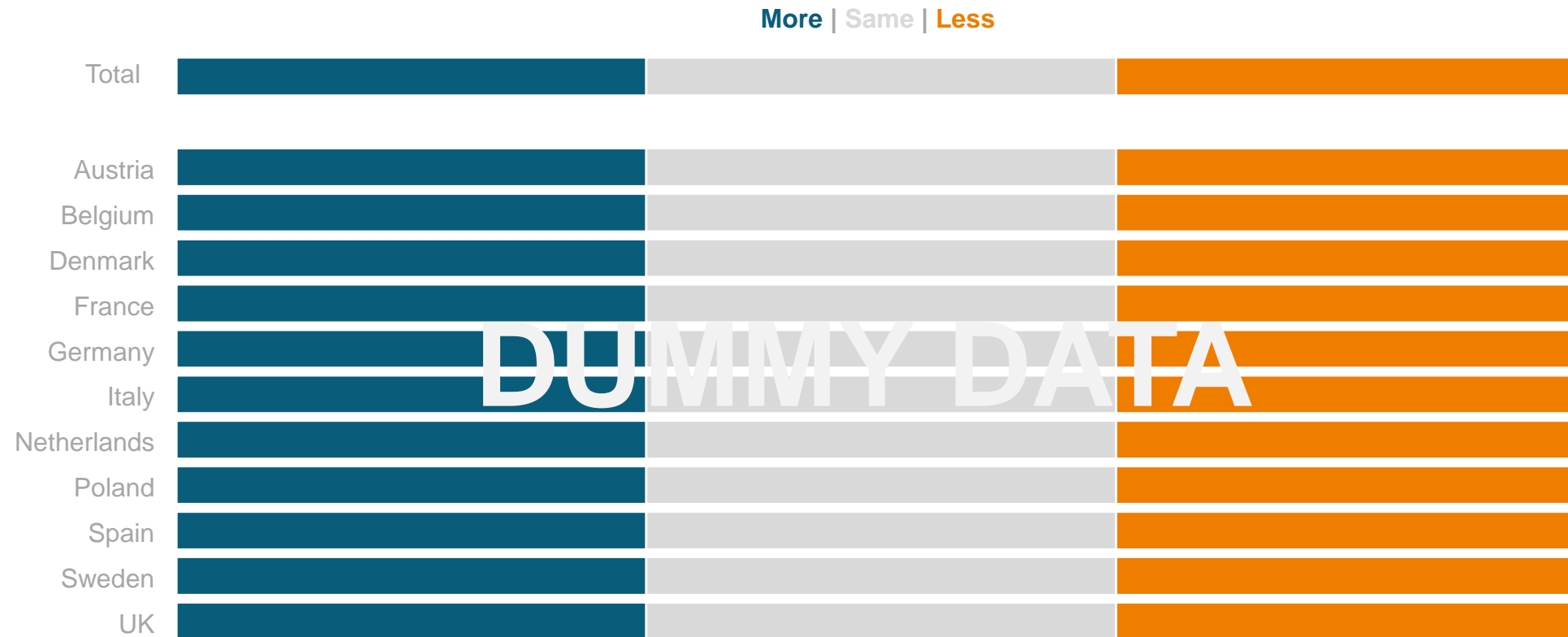
To what degree do you expect to spend more or less money on home improvement in April - June compared to the same period last year?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Spending on improvement jobs

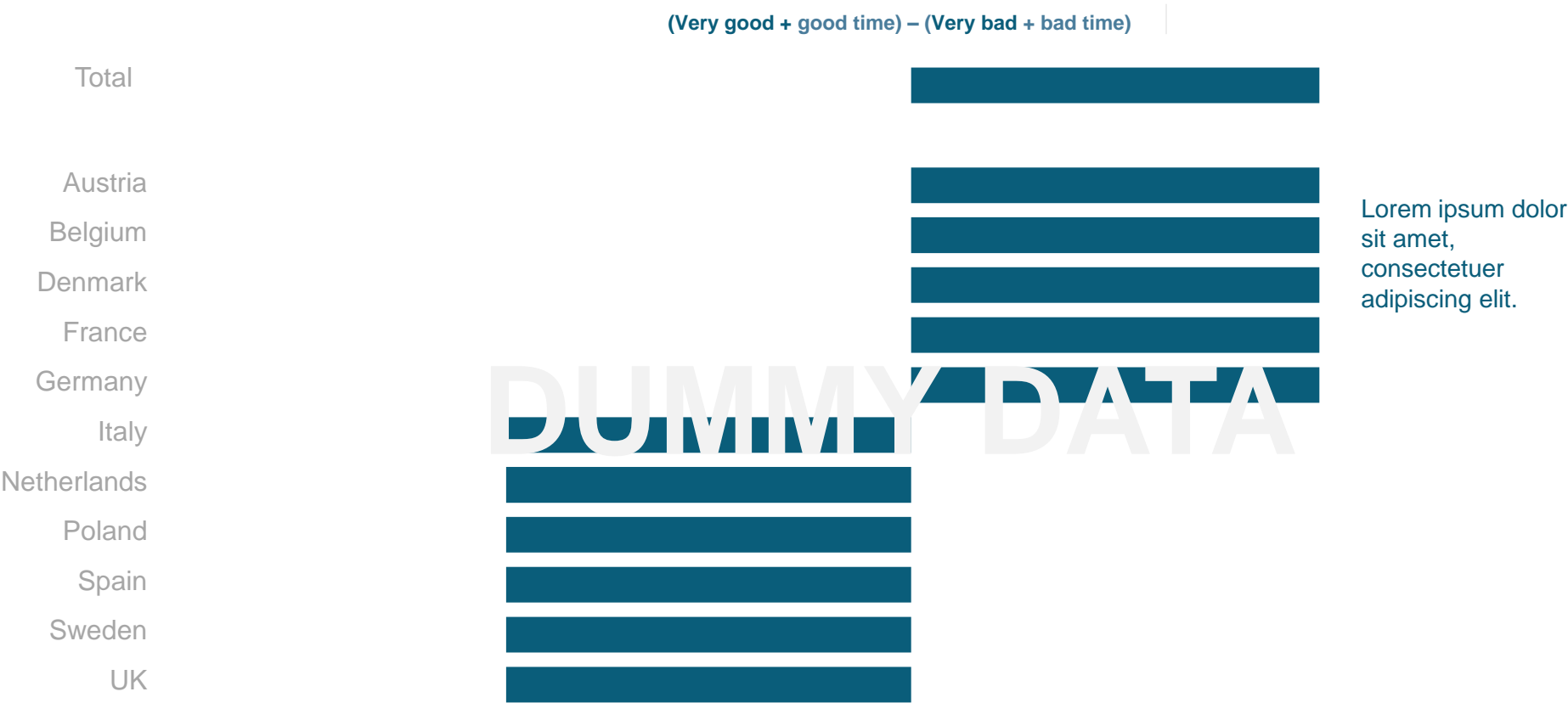
To what degree do you expect to spend more or less money on home improvement in the next 12 months compared to the same period last year?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

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?

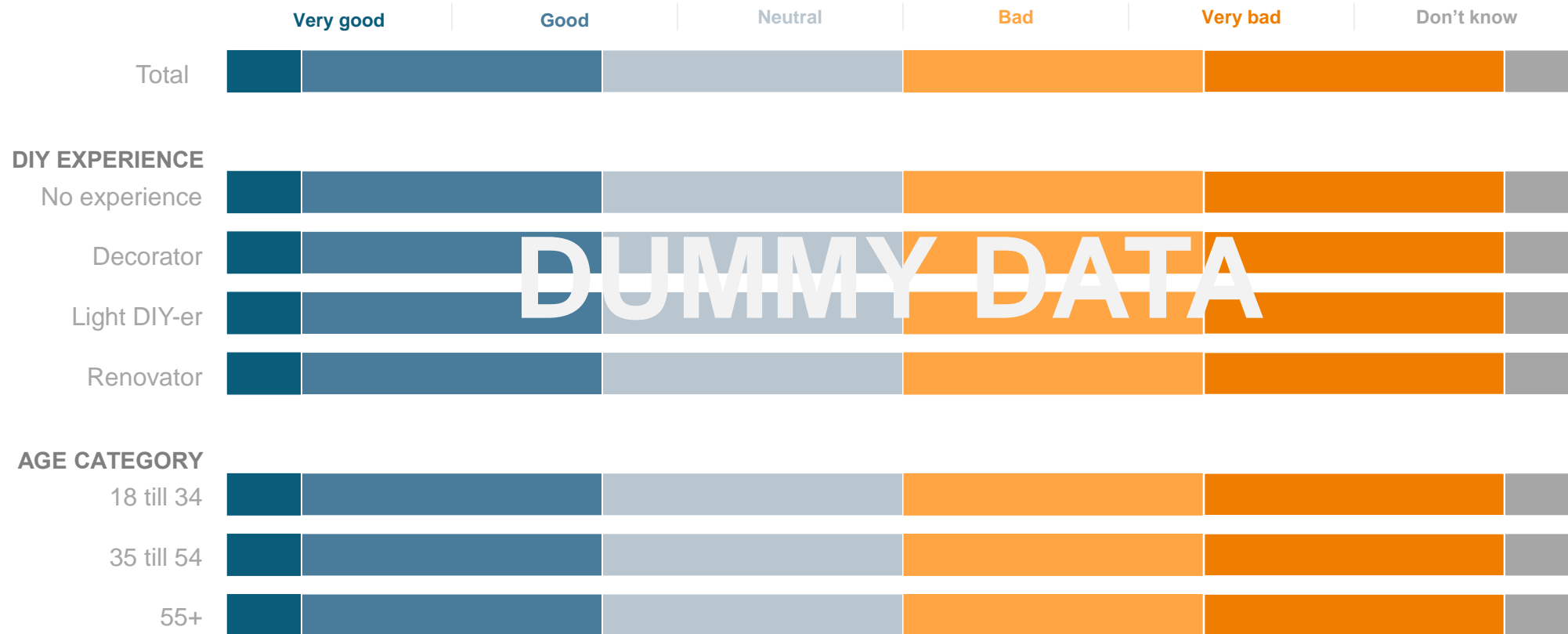


Base: N=6,669
 Values below 5% are not labelled
 European Home Improvement Monitor Q1 2024

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

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?

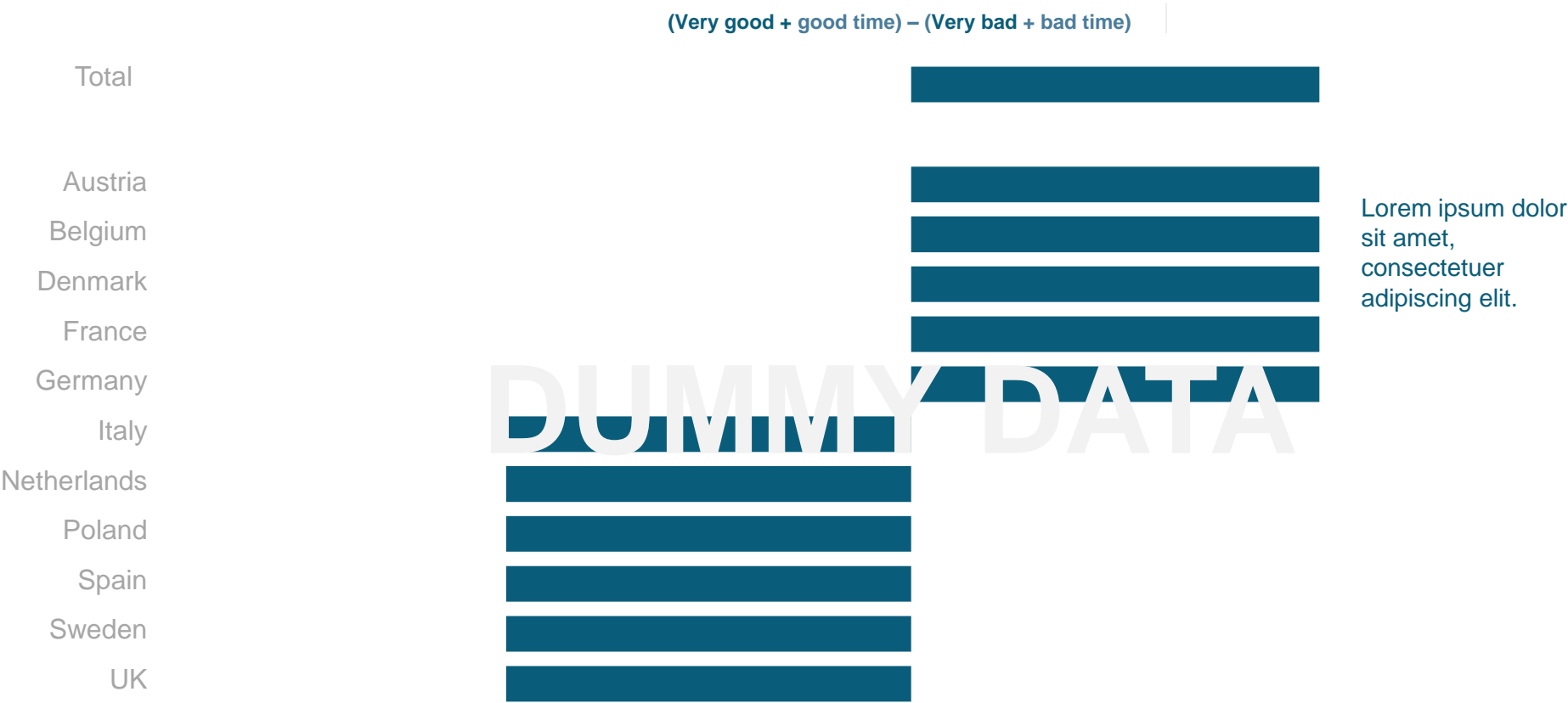


Base: N=6,669
Values below 5% are not labelled

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

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?

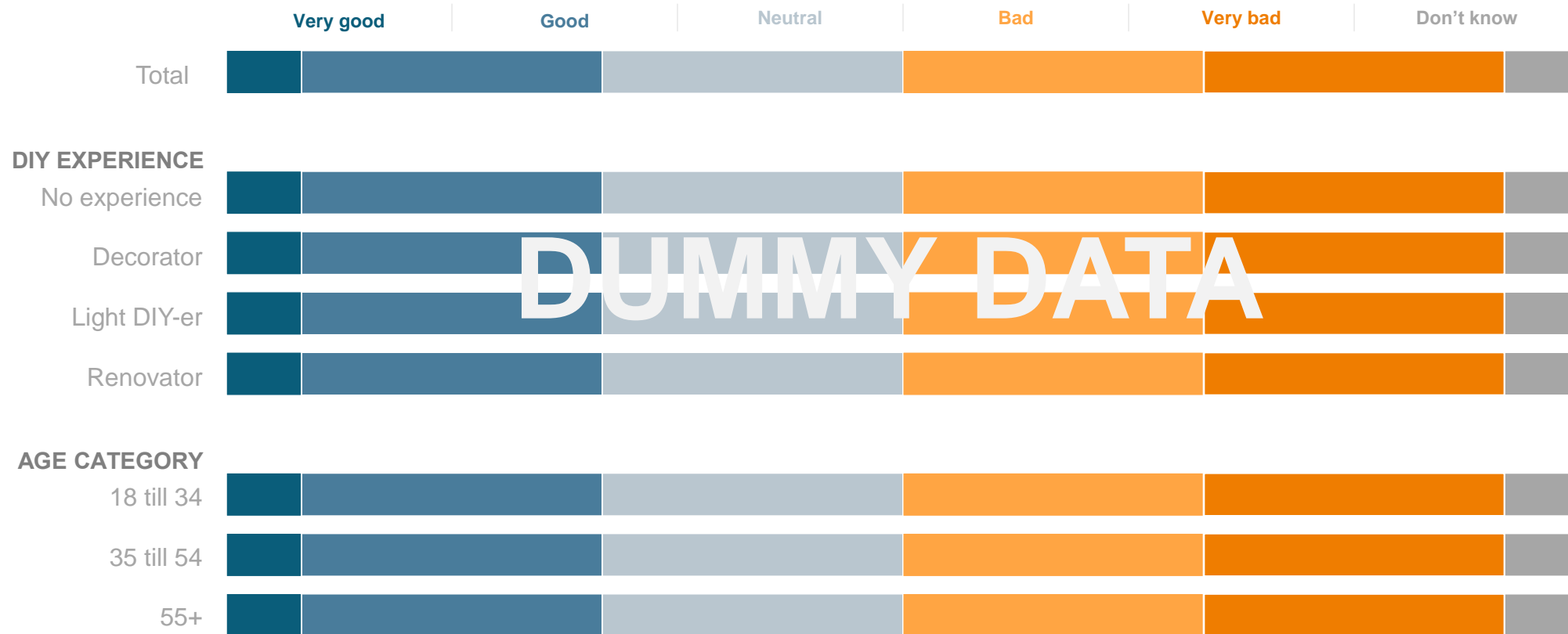


Base: N=6,669
Values below 5% are not labelled
European Home Improvement Monitor Q1 2024

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Start a project over €5.000

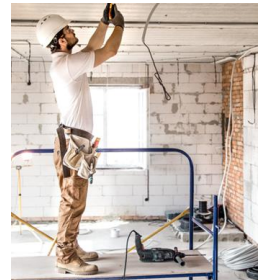
Do you feel this month is a good or bad time to start a project over €5.000 for home improvement, repair or maintenance?



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

Summary: Outlook for Home Improvement Product Spending

- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.



Index

About The Research

Economic developments

Spending per quarter

Outlook

Theme part

Orientation

Sustainability

Country Overview

Home improvement per category

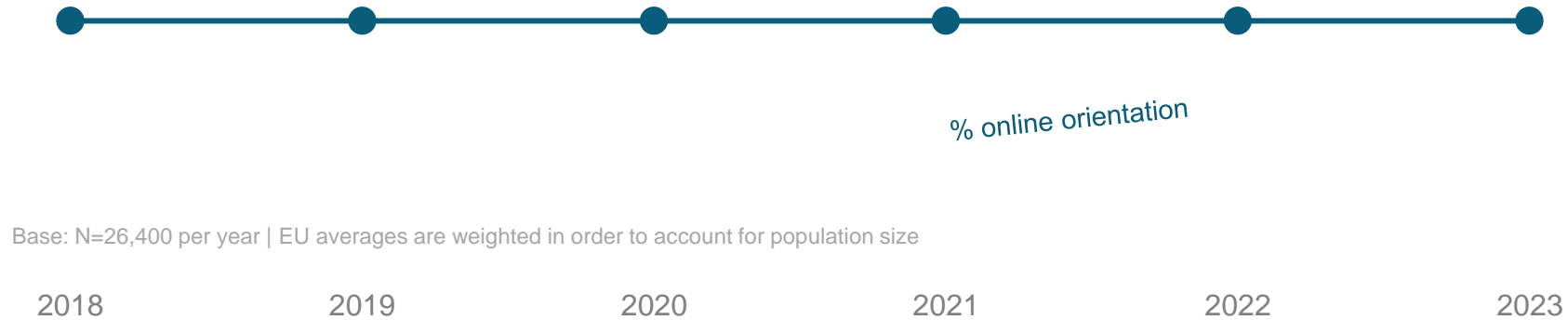


Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Online orientation

Did you get information about the product online?

DUMMY DATA



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

*The measurement includes the following product categories:

bath
bathroom furniture
boiler
dormer window
flooring products

lock
paint
power tools
roof window
sandpaper

sealants
shower drain
shower enclosures
shower set / shower head
shower tray

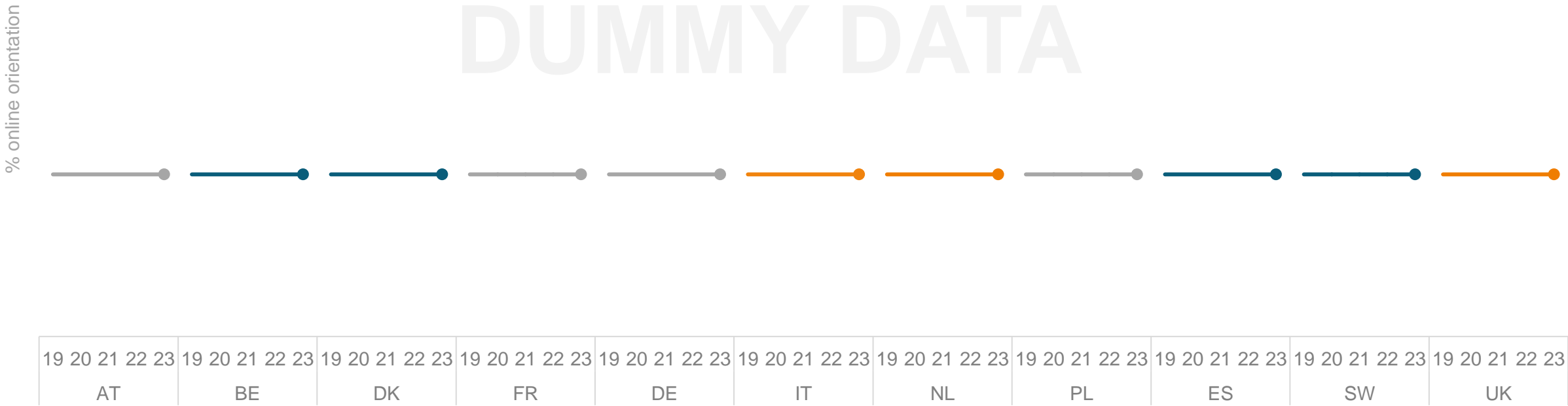
tapes
taps & mixers
tile adhesive
toilet
wallpaper

washbasin
whirlpool
window decoration

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Online orientation

Did you get information about the product online?



Base: n=2,400 per year per country
*The measurement includes the following product categories:

bath
bathroom furniture
boiler
dormer window
flooring products

lock
paint
power tools
roof window
sandpaper

sealants
shower drain
shower enclosures
shower set / shower head
shower tray

tapes
taps & mixers
tile adhesive
toilet
wallpaper

washbasin
whirlpool
window decoration

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Moment of brand selection

Did you make your brand selection in the shop, or did you already make your brand selection before going to the shop?

% of people who selected a brand **before going to the shop**

DUMMY DATA



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

2018

2019

2020

2021

2022

2023

*The measurement includes the following product categories:

bath
bathroom furniture
boiler
dormer window
flooring products

lock
paint
power tools
roof window
sandpaper

sealants
shower drain
shower enclosures
shower set / shower head
shower tray

tapes
taps & mixers
tile adhesive
toilet
wallpaper

washbasin
whirlpool
window decoration

Summary: Online orientation

- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.



Index

About The Research

Economic developments

Spending per quarter

Outlook

Theme part

Orientation

Sustainability

Country Overview

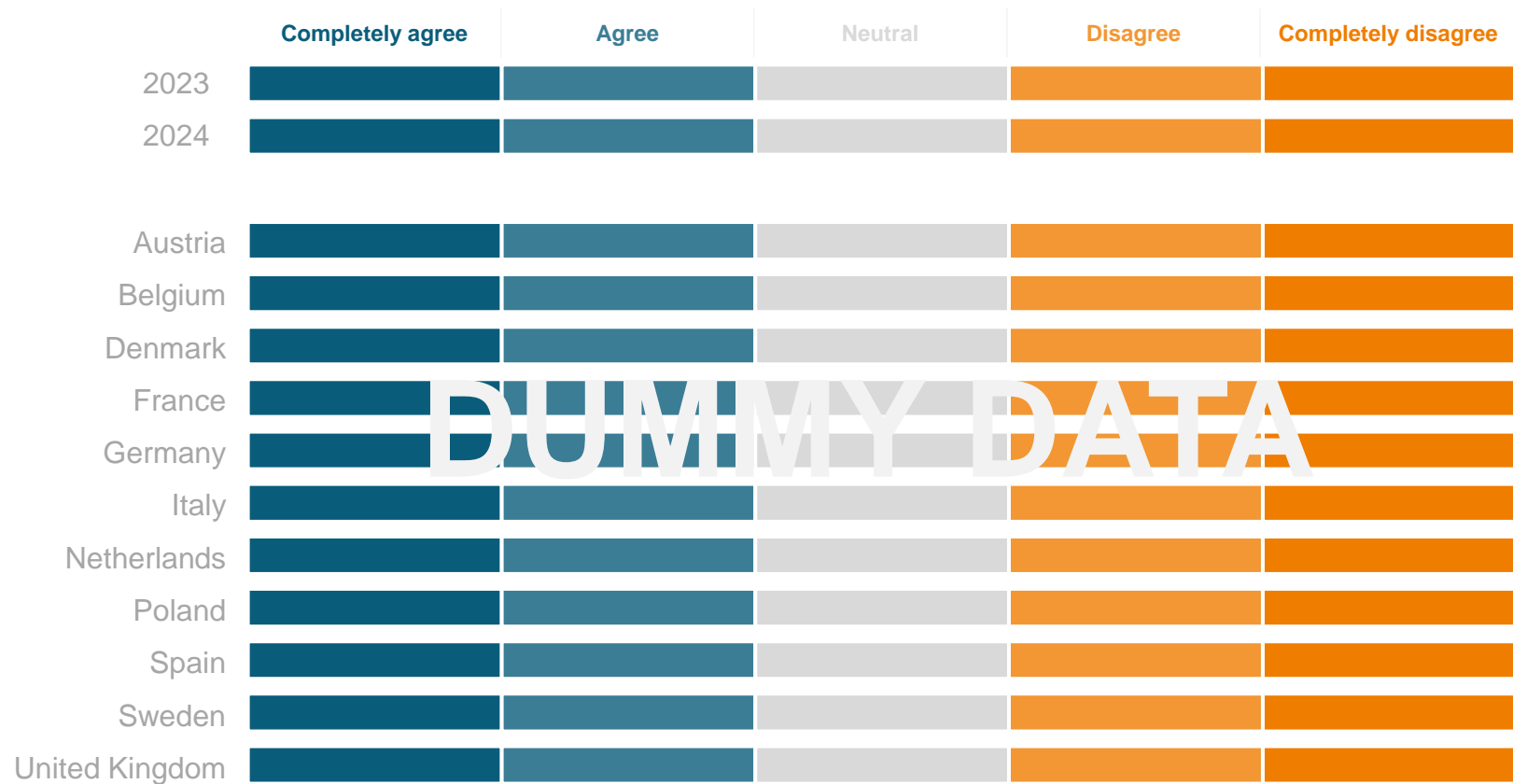
Home improvement per category



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Energy efficiency

My home is already very energy efficient

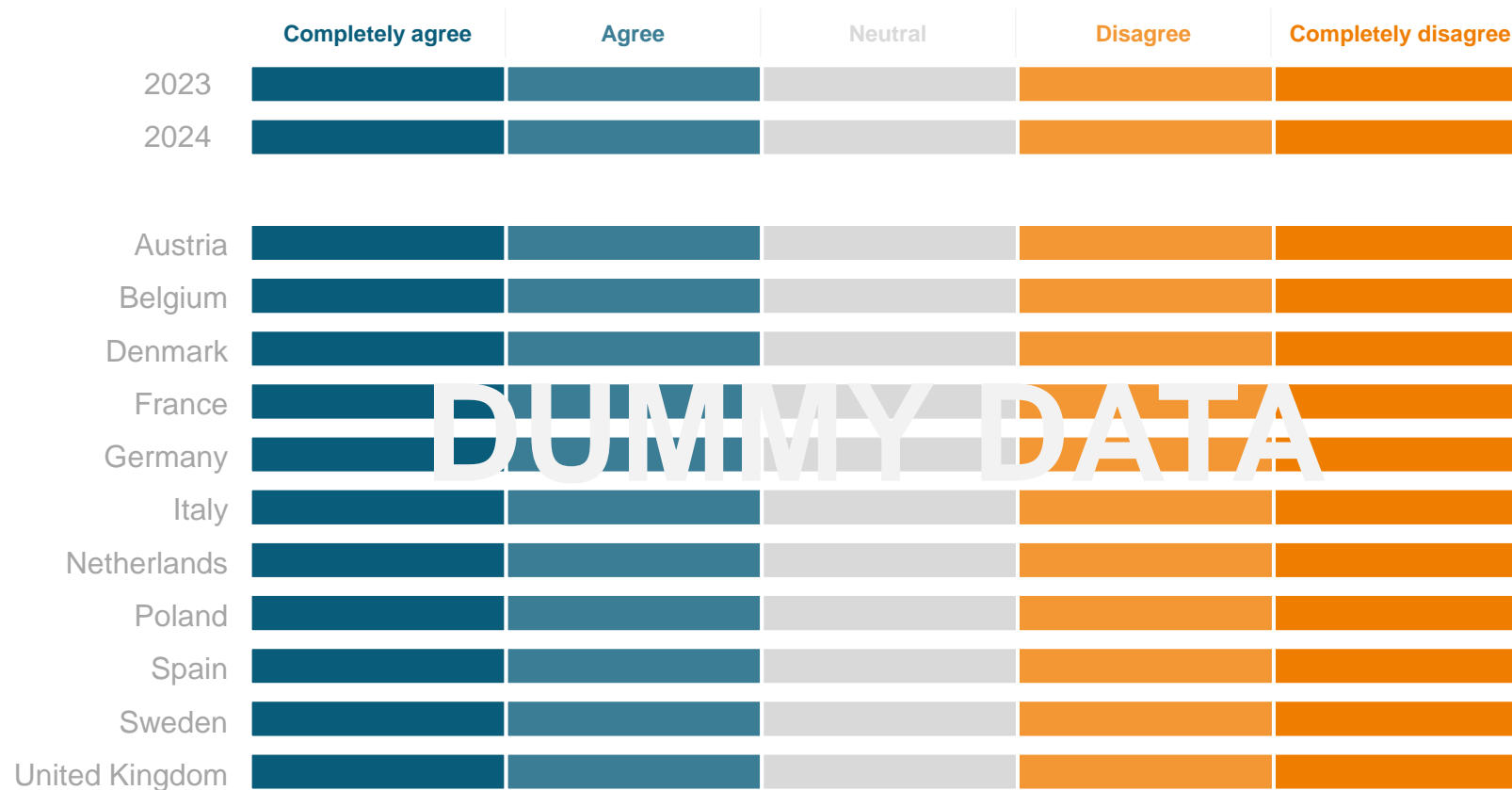


Base: N=6,669
Values below 5% are not labelled

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Seeking for sustainability improvements

I am actively looking for ways to improve the energy efficiency of my home



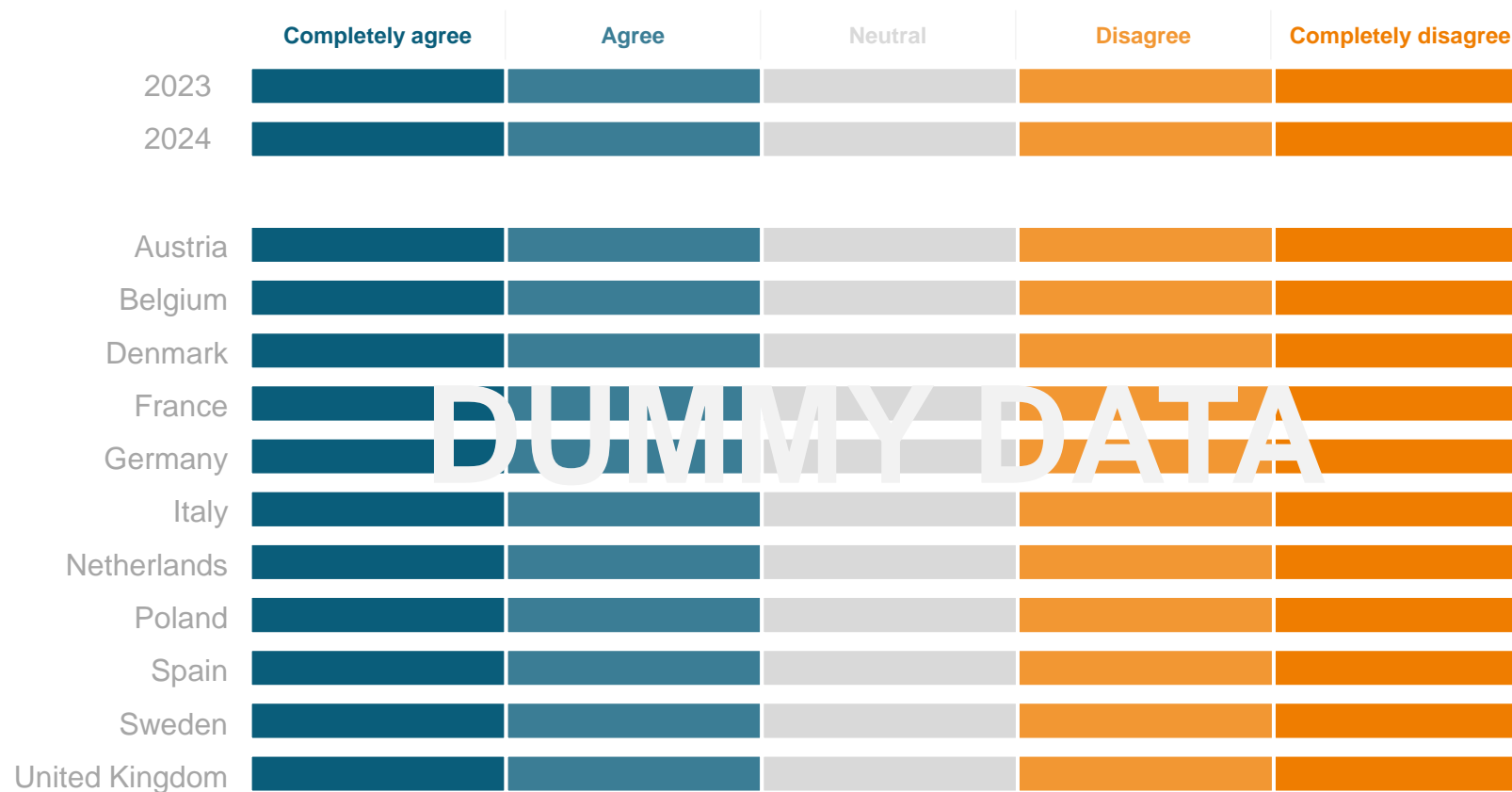
Base: N=6,669

Values below 5% are not labelled

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Sustainability investments

I will probably invest in making my house more energy efficient in the next 12 months

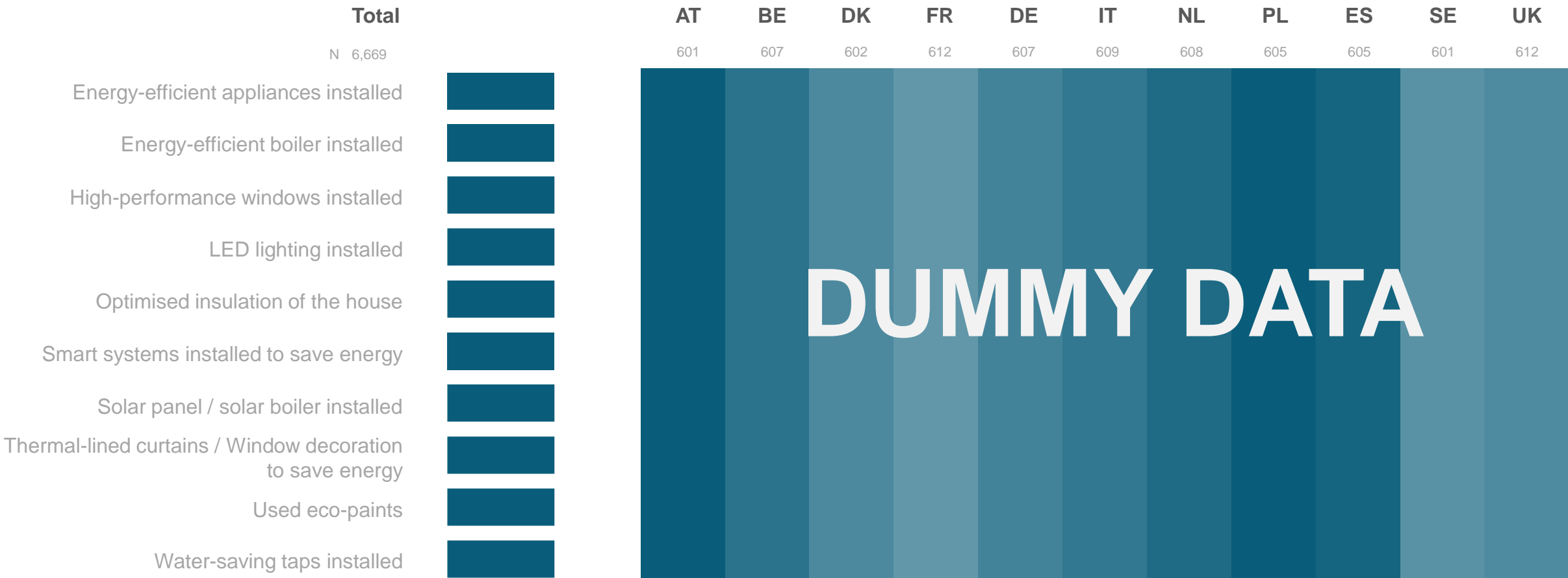


Base: N=6,669
Values below 5% are not labelled

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Applied sustainability measures – Top 10

Which of the following measures to improve sustainability has been applied to your house?

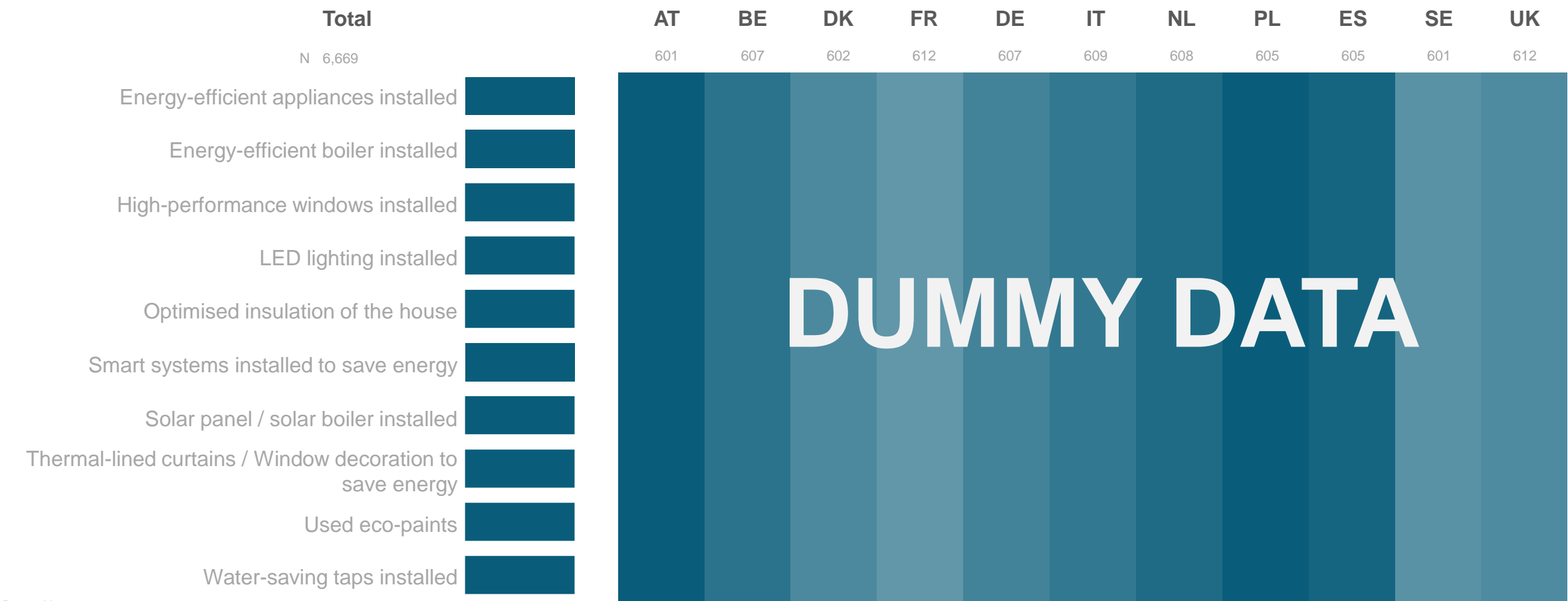


Base: N=6,669
European Home Improvement Monitor Q1 2024

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Interest in sustainability measures – Top 10

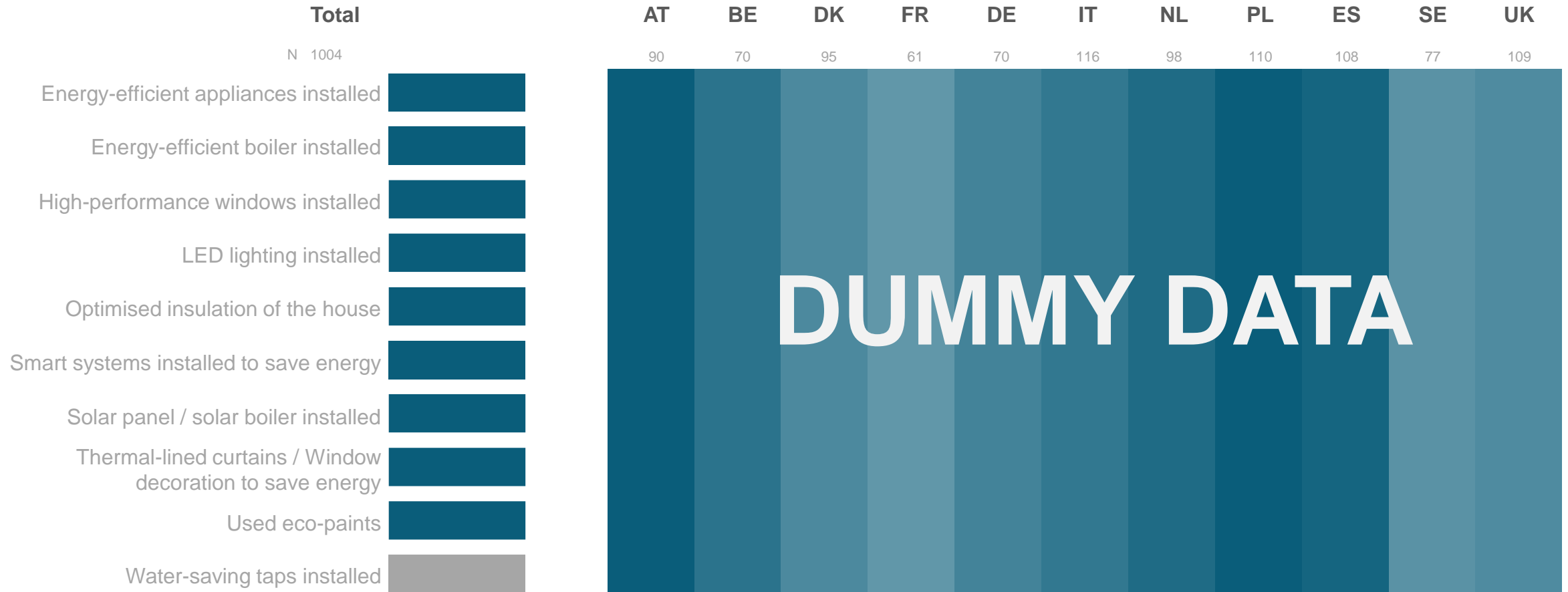
Which of the following sustainability improvements would you be interested in applying in your house?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Planned sustainability measures – Top 10

Which of these sustainability improvements do you expect to apply within the next 12 months?

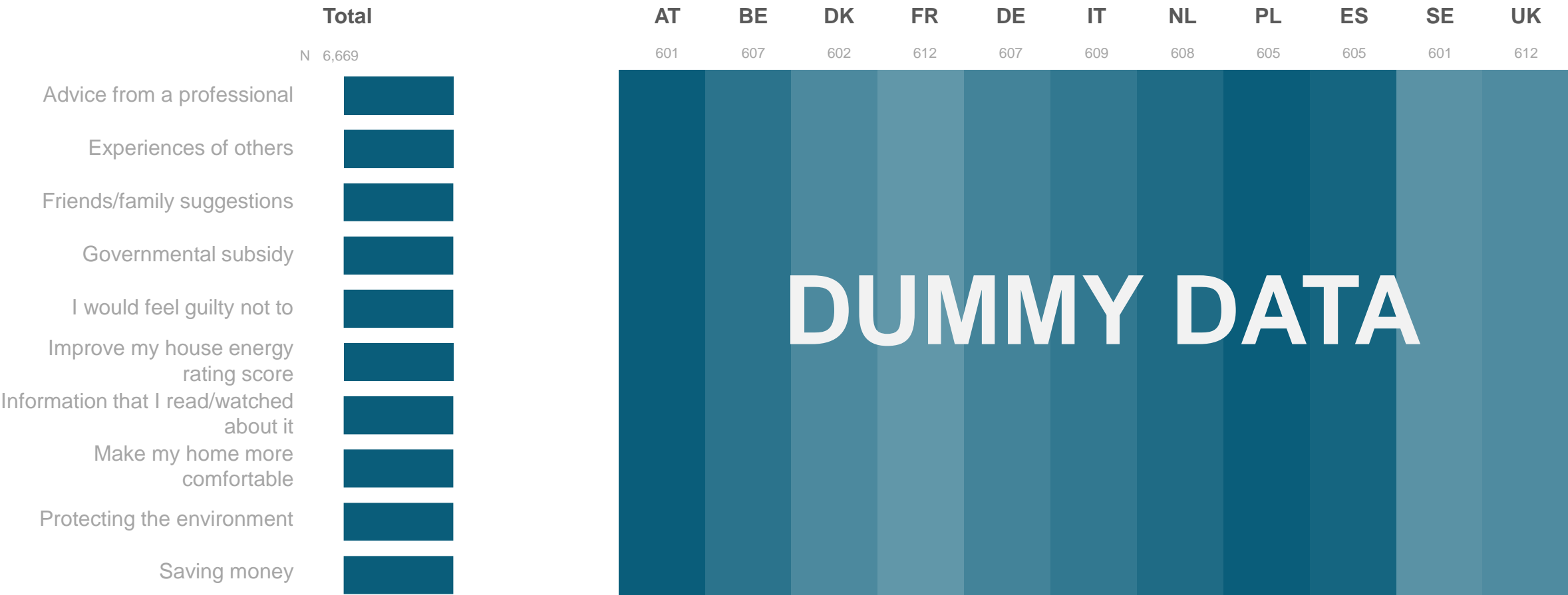


Base: N=1,004

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Sustainability drivers

What are the main drivers for more sustainability improvements to your home?

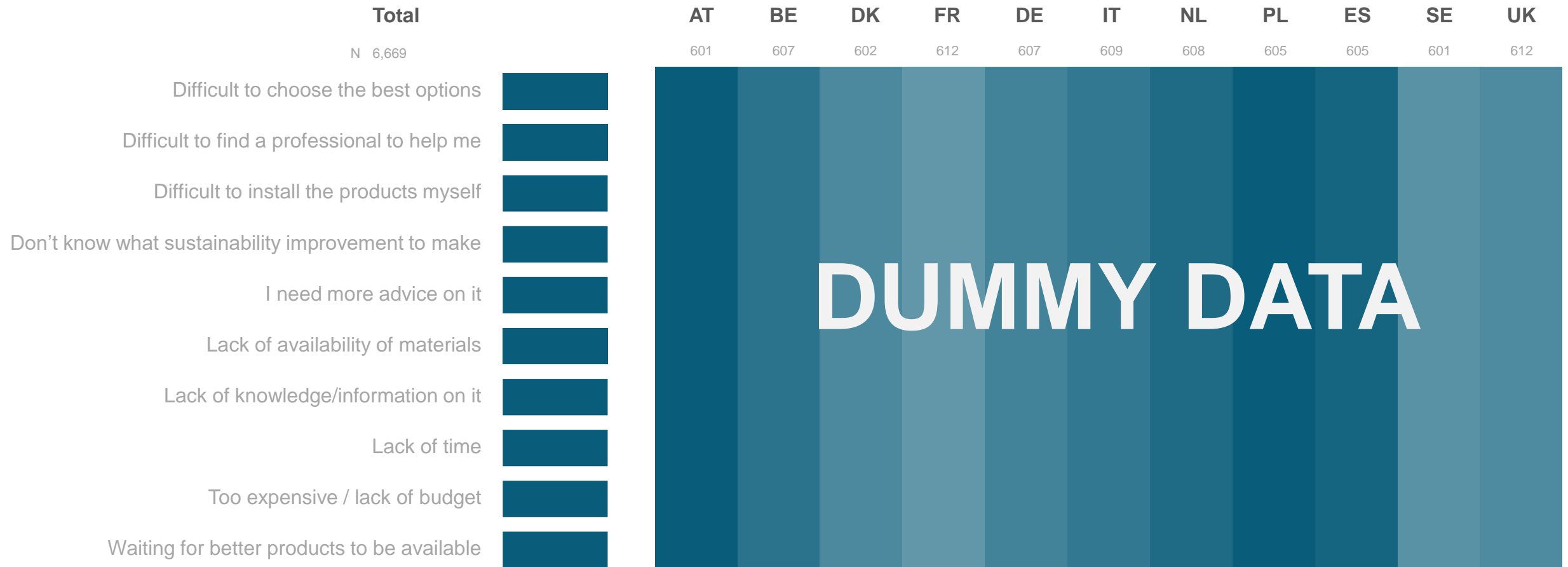


Base: N=6,669
European Home Improvement Monitor Q1 2024

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Sustainability barriers

What are the main barriers for you to take more sustainability improvements for your home?

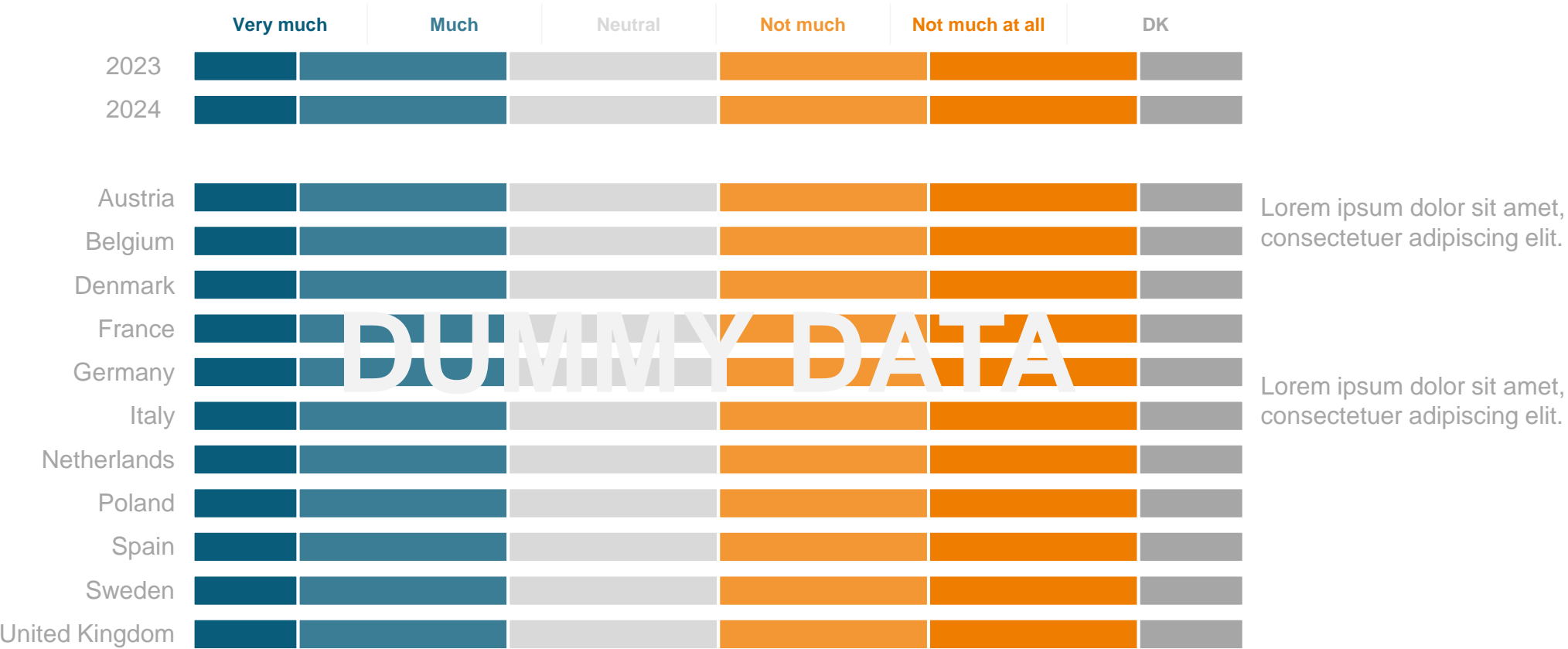


Base: N=6,669

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Sustainable products

When buying products in a DIY store, do you care about buying environmentally sustainable products?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Sustainability aspects

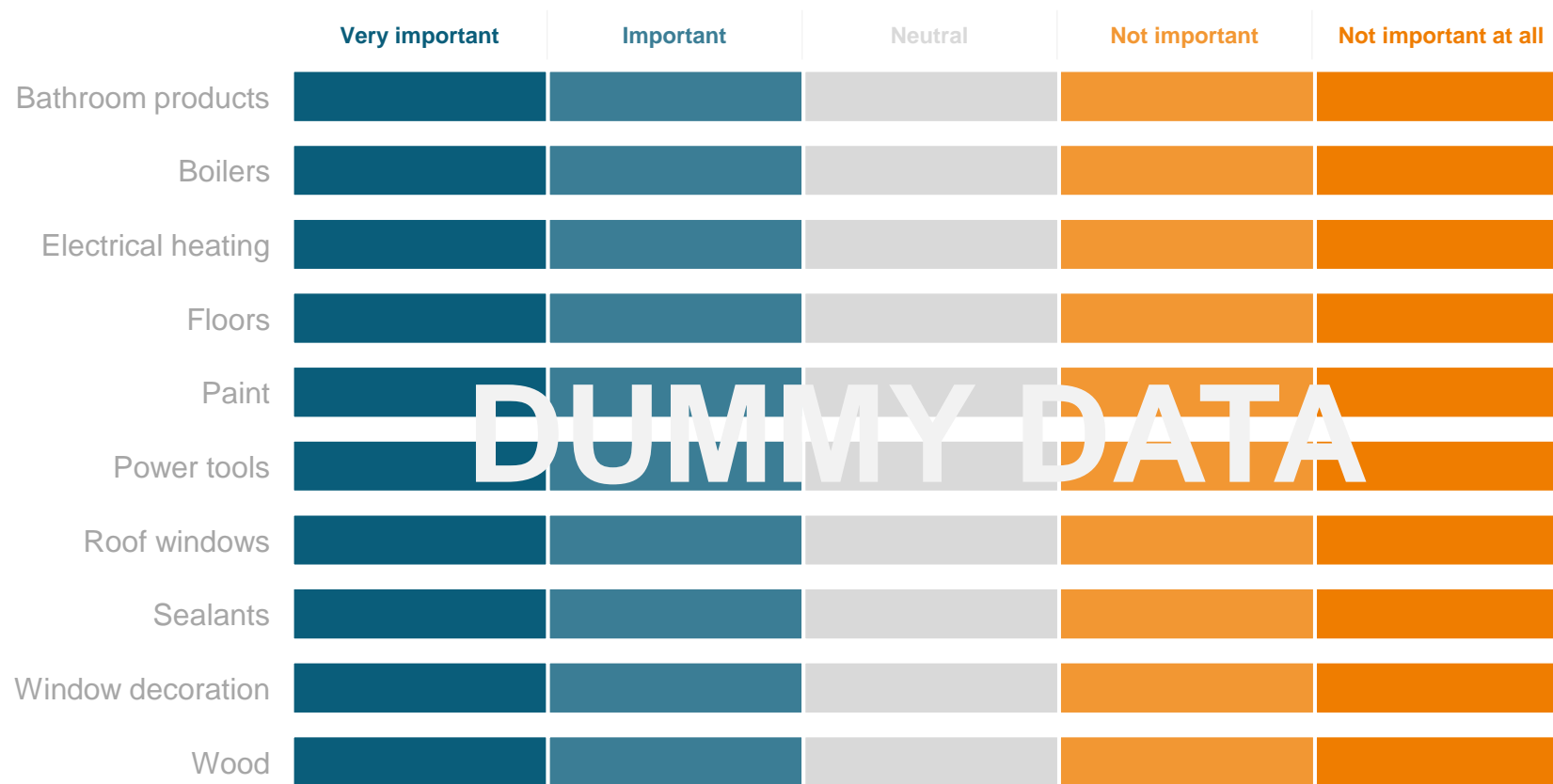
When buying DIY products, what are the most important sustainability aspects to consider?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Sustainable products

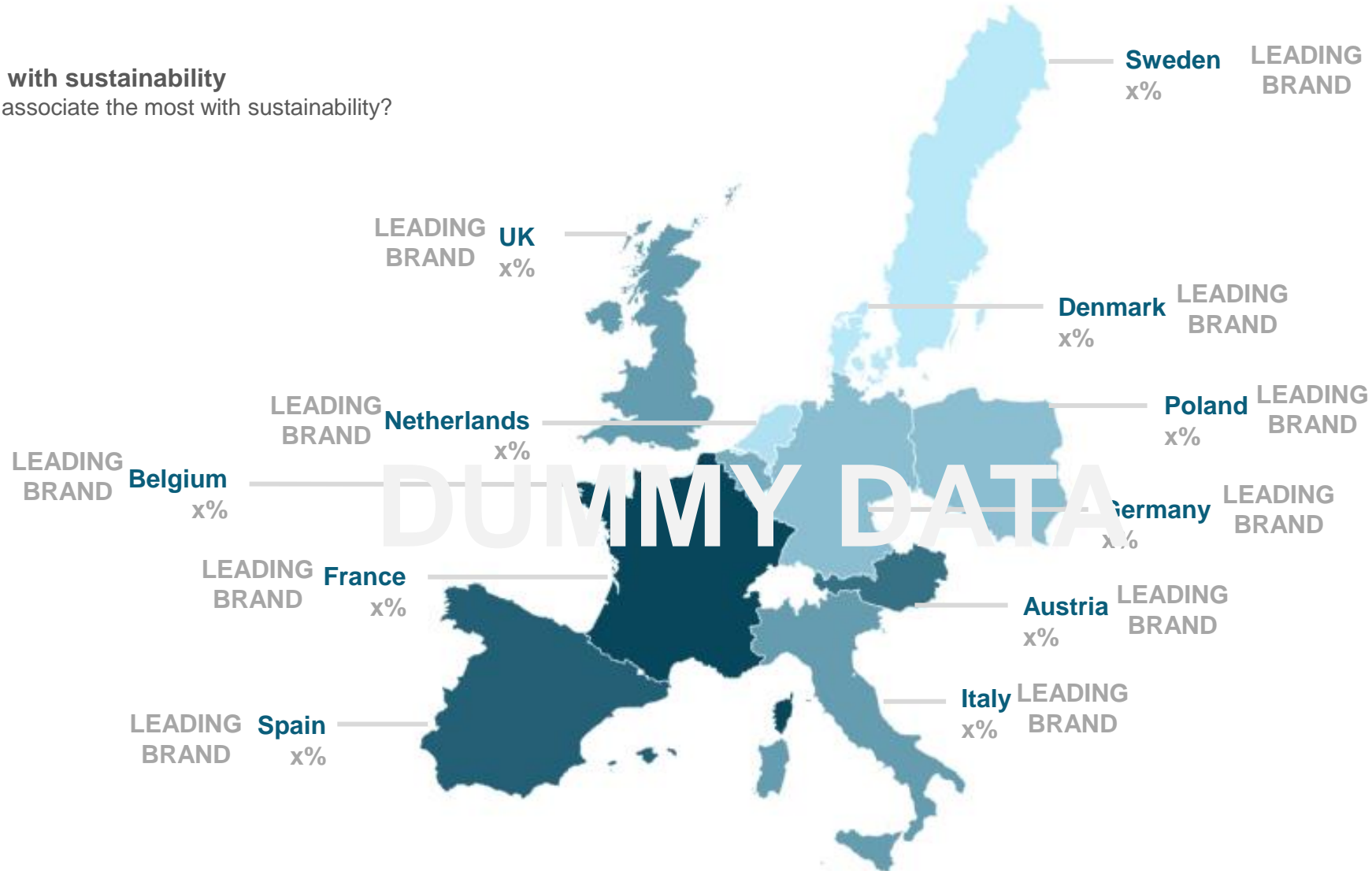
How important are sustainability aspects when purchasing the following products?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

DIY store associated with sustainability

Which DIY store do you associate the most with sustainability?



Lorem ipsum dolor sit amet, consectetur adipiscing elit.

DIY store aspects

To what degree is it important for you that a DIY store:



Base: N=3,304

DIY product brand aspects

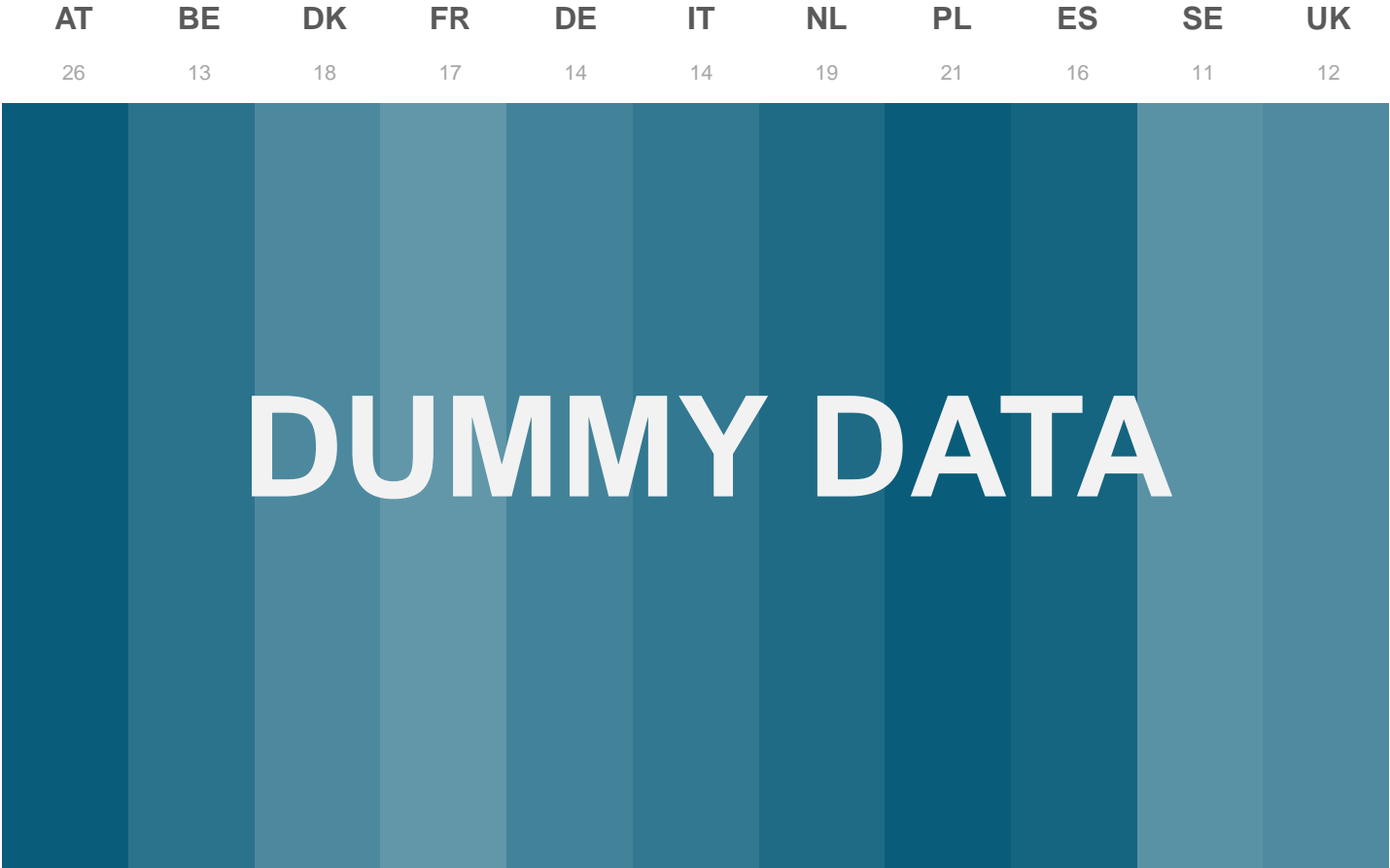
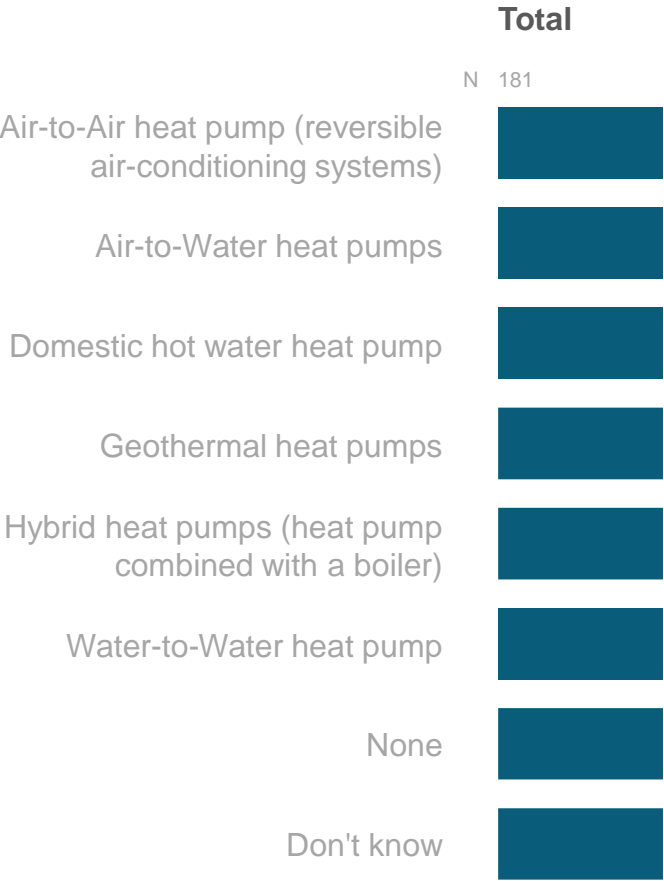
To what degree is it important for you that a DIY product brand:



Base: N=3,365

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Heat pump – planned purchase
What type of heat pump do you plan to purchase?



Summary: Sustainability

- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit..
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Lorem ipsum dolor sit amet, consectetur adipiscing elit.



Index

About The Research

Economic developments

Spending per quarter

Outlook

Theme part

Orientation

Sustainability

Country Overview

Home improvement per category



AUSTRIA

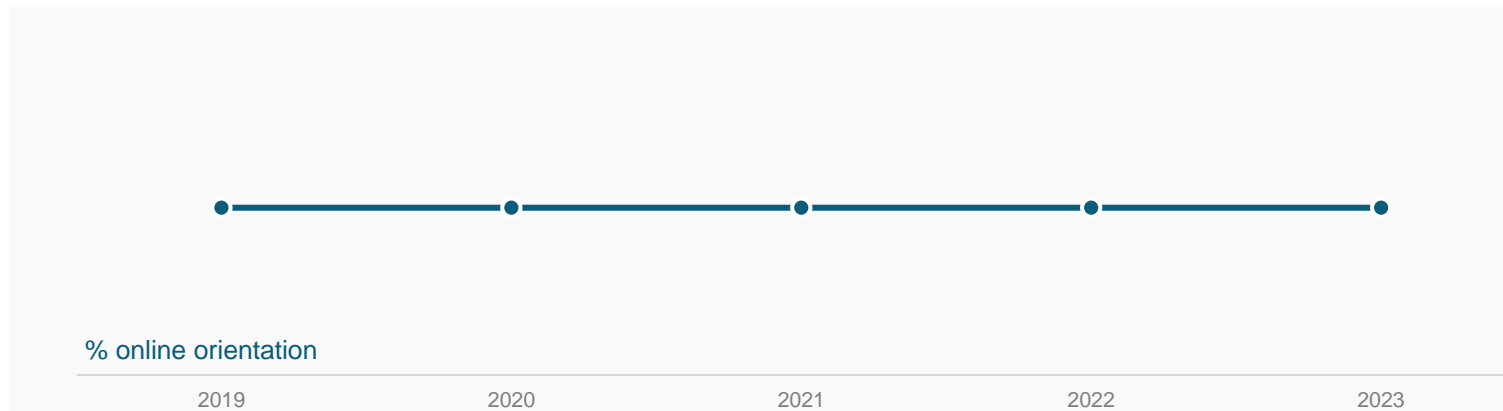
Share of households that did a home improvement job

AUSTRIA
EU AVERAGE



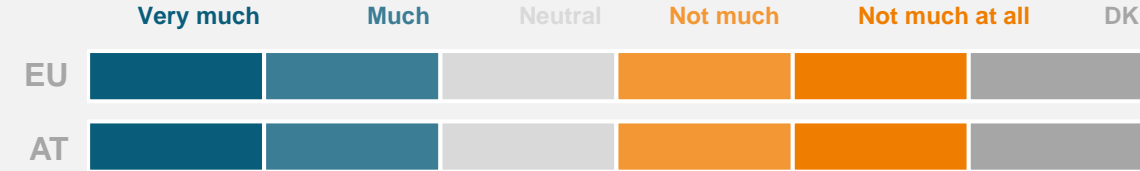
Base: n=600 per quarter

Trend of getting product information online

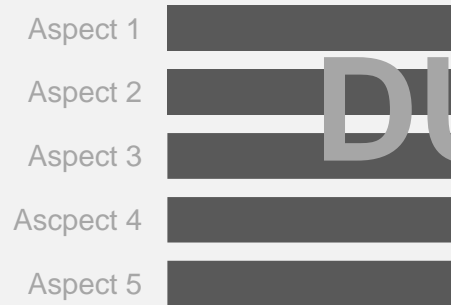


Lorem ipsum dolor sit amet, consectetur adipiscing elit.

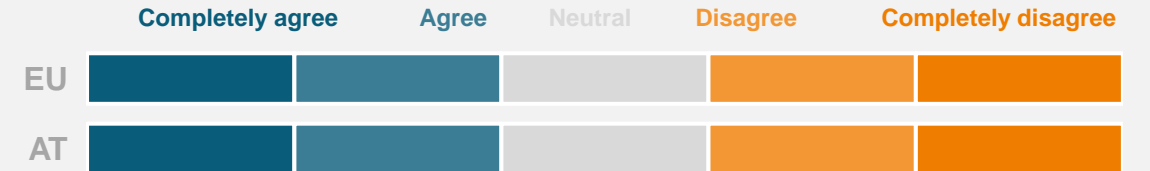
When buying products in a DIY store, do you care about buying environmentally sustainable products?



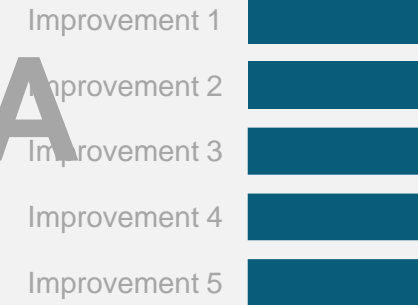
When buying DIY products, what are the most important sustainability aspects to consider?



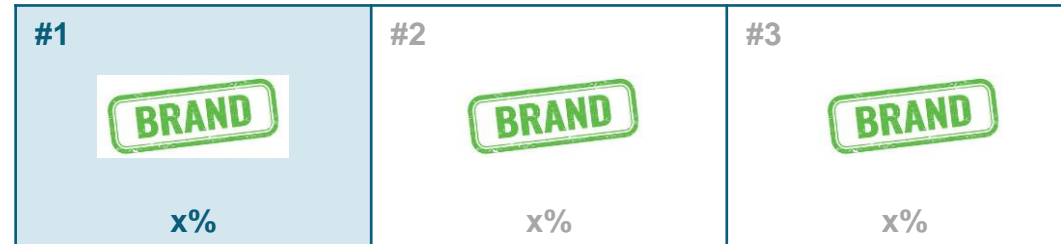
I am actively looking for ways to improve the energy efficiency of my home



Which of the following sustainability improvements would you be interested in applying in your house?



Which DIY store do you associate the most with sustainability?



Index

About The Research

Economic developments

Spending per quarter

Outlook

Theme part

Orientation

Sustainability

Country Overview

Home improvement per category



USP Marketing Consultancy

© 04 June 2024, USP Marketing Consultancy B.V.

The information in this publication is strictly confidential and all relevant copyrights, database rights and other (intellectual) property rights are explicitly reserved. No part of this publication may be reproduced and/ or published without the prior written permission of USP Marketing Consultancy B.V.