



European Home Improvement Monitor Q3 2025

Branding - Evolution of private labels

About European Home Improvement Monitor

RESEARCH OBJECTIVE

To track behaviour and trends in the European home improvement market, conducted 4 times a year with 6,600 online interviews per quarter across 11 major European markets.

THE RESEARCH TOPICS

Base part: European home improvement market developments, including product category penetration, spending, and brand selection timing.

QUARTERLY THEME PART TOPIC IN 2025:

Q1: Needs & willingness to invest in sustainability

Q2: Purchase channels – Smart homes & products

Q3: Branding - Evolution of private labels

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

PROJECT TEAM



Luka Mandic
Project Manager
mandic@usp-mc.nl



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



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

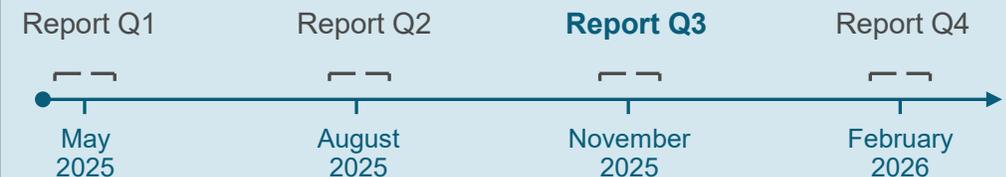
COUNTRY SCOPE



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

Insights are provided for **11** European countries

THE TIMELINE



Index

About the Research

Home Improvement Tracker

Theme Part

Country Overview

Home Improvement per Category

Appendix



Home Improvement Tracker

In this chapter, we explore quarterly spending trends on home improvement products, the broader economic outlook and consumers' home improvement plans:



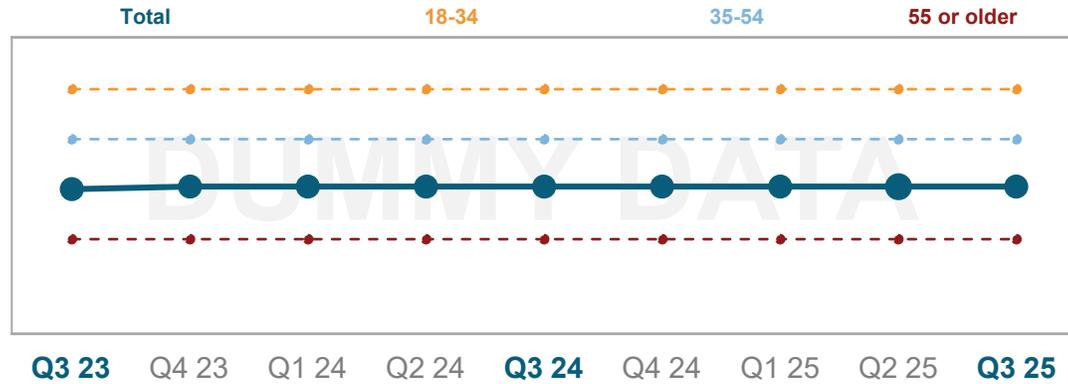
- Share of households that have done a home improvement job
- European spending on labour and material
- European spending on products/material and labour

Respondents were asked:

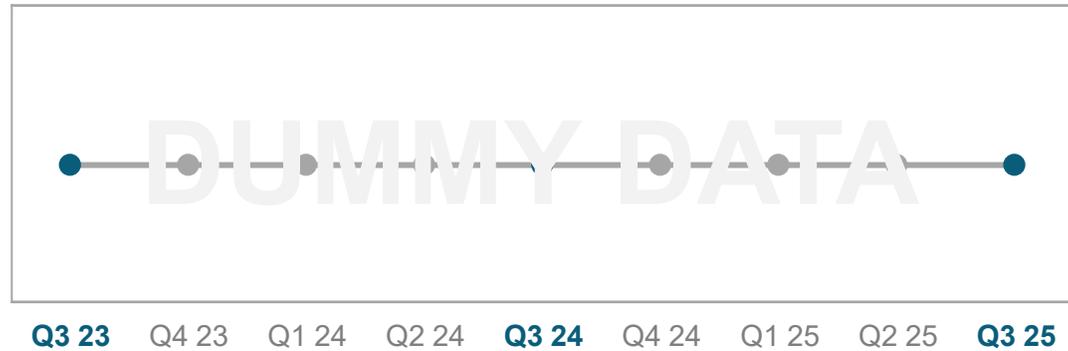
- To what degree do you expect to **spend more or less money** on home improvement **in the next 12 months** compared to the same period last year?
- Are you **planning to start** a home improvement, repair or maintenance project **in the next 30 days**?
- Do you feel this is a **good or bad time** to **hire a professional** for home improvement, repair or maintenance?
- **In the last 30 days**, have you **postponed or cancelled** a home improvement, repair or maintenance project you planned to start?
- Do you have plans to **move** within **the next 12 months**?
- Looking forward to **the next 12 months**, do you expect the **number of home improvement jobs** in- or outside your home to be **more, the same or less** than the same period last year?
- Why did you **postpone or cancel** your home improvement, repair or maintenance project?

HOME IMPROVEMENT: ACTIVITY & SPENDING

Share of Households Doing Home Improvement Jobs



European Home Improvement Spending



Q: Have any changes been made to the inside/ outside of your home in the last 3 months?
 Q: Could you give an estimation on your spending on home improvement in the past 3 months?
 Spending includes only home improvement jobs costing less than €10K.

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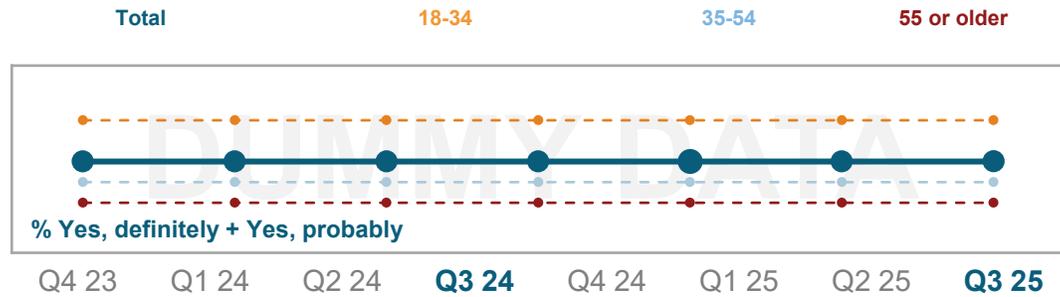
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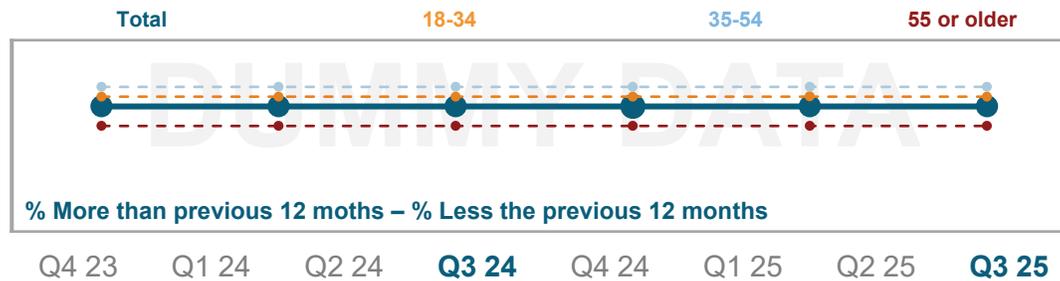
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HOME IMPROVEMENT: FORECAST

Plans To Start A Home Improvement In The Next 30 Days



Balance of Expected Spending – Next 12 Months



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Q: Do you have plans to move in the next 12 months?

Q: Are you planning to start a home improvement project in the next 30 days?

Theme questions

In this chapter, we take a deeper dive into home improvement brands and private labels. The respondents were asked the following:



What are your preferences for buying branded and non-branded home improvement products online, considering **price, brand preference, motivation, and the importance of brand names?**

How would you rate [1-10] the following DIY stores on the aspects:

- **Service & advice**
- **Quality of products**
- **Attractive prices**
- **Sustainability**
- **Shopping experience**
- **General satisfaction**

Private labels and home brands (own-brands) are regularly offered in DIY stores as an alternative to the A-brands. Usually these products are cheaper due to lower marketing costs for these brands. **What's your opinion on these home-brands in DIY stores?**

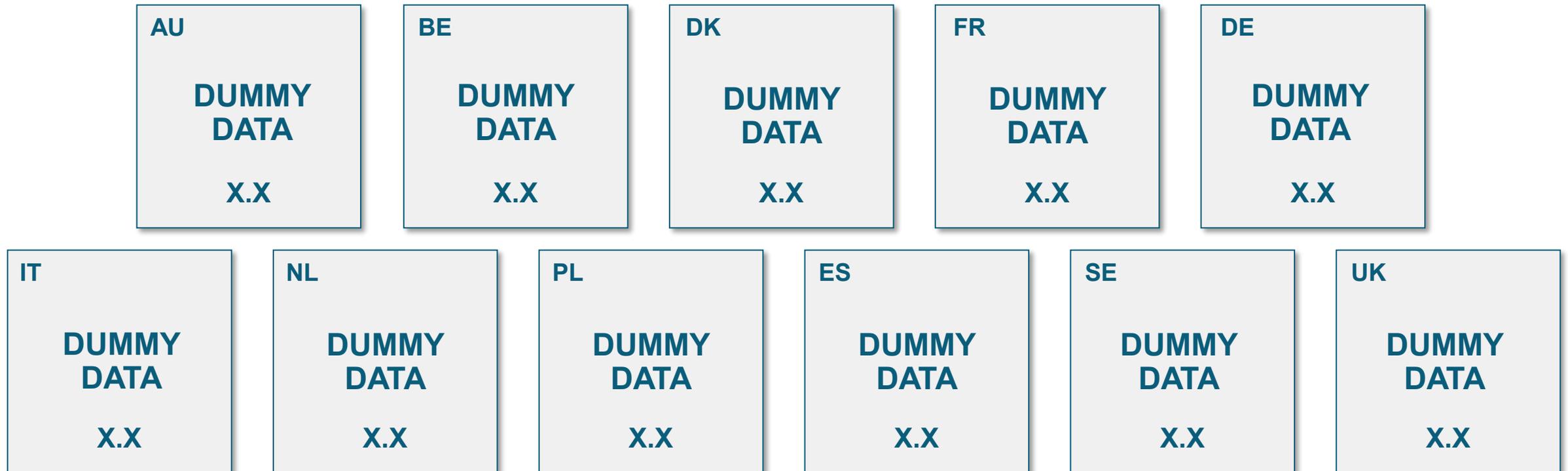
In which of the following categories would you prefer an A-brand over a home brand? Covered categories: paint, bathroom products, masking tapes, garden tools, adhesives, sealants, locks, safety cameras, plugs, roof windows, boilers, taps, duct tape and brushes/rollers.

How would you rate [1-10] the following brands on the aspects:

- **General rating**
- **Quality**
- **Value for money**
- **Trust/ Attractive design**
- **Ease of use**

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DIY stores with the highest general satisfaction score in Europe
How would you rate [1-10] the following DIY stores on general satisfaction?



Base:N = 6,613

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Top-5 DIY stores with the highest general satisfaction score in Europe
 How would you rate [1-10] the following DIY stores on general satisfaction?

#1	#2	#3	#4	#5
<p>DUMMY DATA</p> <p>X.X</p>				

Base:N = 6,613

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Average satisfaction score per aspect

How would you rate [1-10] the following DIY stores on these aspects?

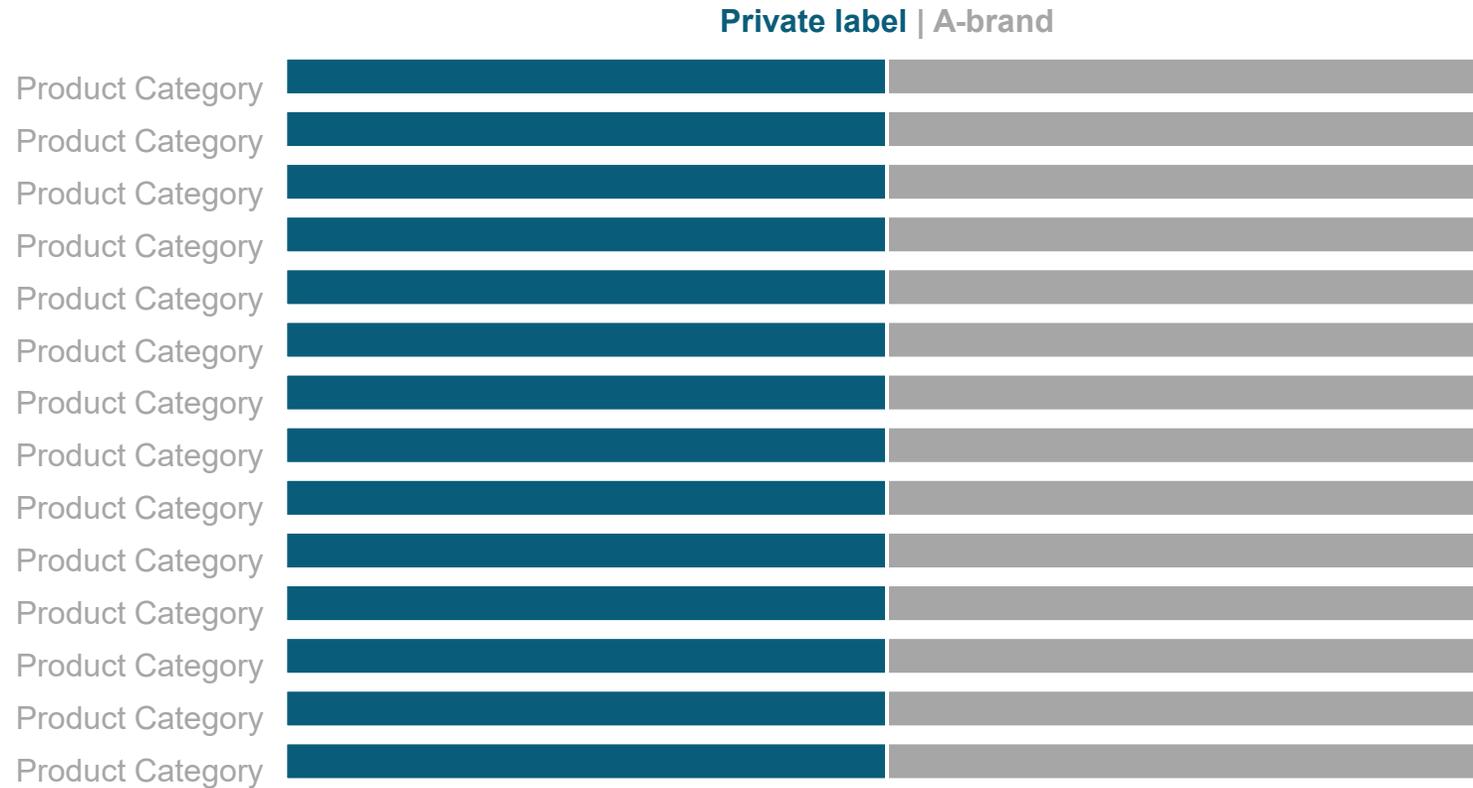
Overall EU level

	Avg satisfaction score	#1	#2	#3
Quality of products	X.X	DUMMY DATA X.X	DUMMY DATA X.X	DUMMY DATA X.X
Shopping experience	X.X	DUMMY DATA X.X	DUMMY DATA X.X	DUMMY DATA X.X
Sustainability	X.X	DUMMY DATA X.X	DUMMY DATA X.X	DUMMY DATA X.X
Service and advice	X.X	DUMMY DATA X.X	DUMMY DATA X.X	DUMMY DATA X.X
Attractive prices	X.X	DUMMY DATA X.X	DUMMY DATA X.X	DUMMY DATA X.X

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A-brand and private label preference

In which of the following categories would you prefer an A-brand over a private label?



Index

About the Research

Home Improvement Tracker

Theme Part

Country Overview

Home Improvement per Category

Appendix

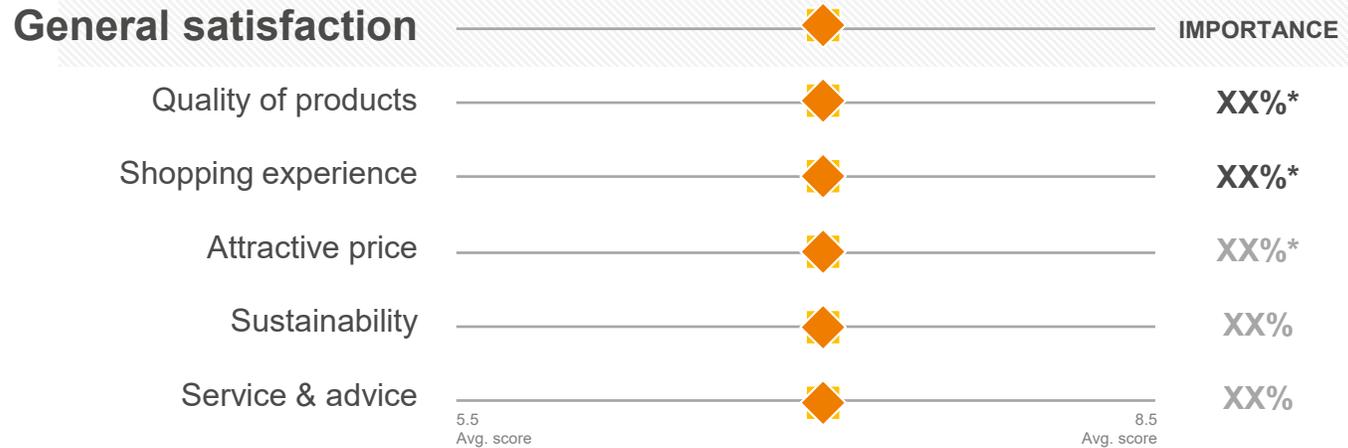


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Satisfaction score on various aspects of DIY stores

Bauhaus Hornbach Lagerhaus OBI



A regression model is built to see to what extent each aspect explains general satisfaction. The higher the percentage, the more the aspect contributes to general satisfaction.

*Statistically significant. If the effect is not significant, there is barely any contribution on general satisfaction.

Base: N = 349

Attitude towards private labels

Balance: % Positive minus % Negative

Positive value denotes positive opinion, negative opposite



Preference: Private labels versus A-brands



Home Improvement per Category

In this chapter, we dive into questions about specific product categories, as mentioned in the previous slide:



- Share of households that have done a **home improvement job per product category** on a **quarterly level**
- **Trend of gathering information online** per product category
- Who **determined the brand** of the product – you or the professional?
- What **brand** of <product category> did you buy?
- Further product specific questions

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)									

Index

About the Research

Home Improvement Tracker

Theme Part

Home Improvement per Category

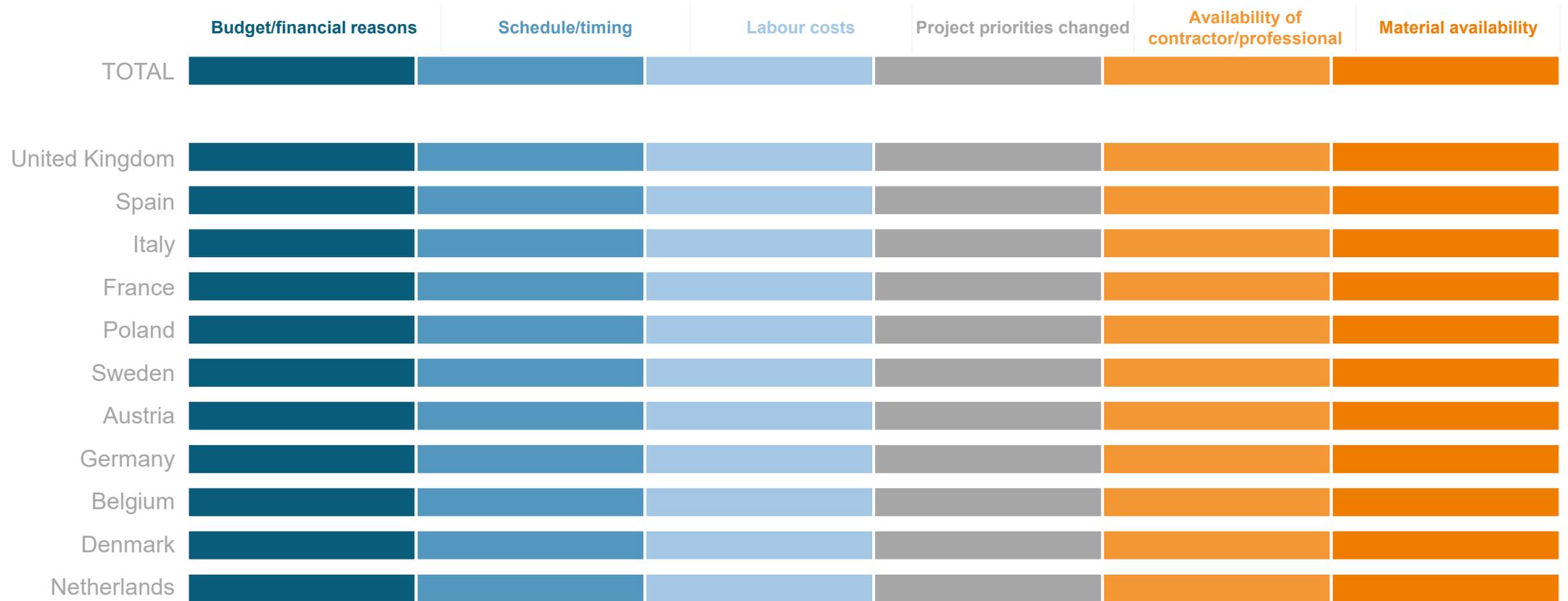
Appendix



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Cancellation reasons

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



Base: N = 1,236

USP Marketing Consultancy

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