



European Home Improvement Monitor Q4 2018
Focus on: Do-It-Yourself vs Do-It-For-Me

One of the reason that we started our market study, the European Home Improvement Monitor, six years ago, was the expected change in the European DIY market. Due to the aging population in Europe, we were expecting that the older generation would stop doing home improvement jobs themselves and would hire a professional instead. On top of this, the younger generations were losing interest in developing DIY skills. Both developments could lead to a shift from Do-It-Yourself towards more Do-It-For-Me, which is an important trend because it could result in a change in purchase channels or worse, a decline of spending on home improvement products. This is because of the fact that the more budget consumers will spent on labour, the less budget remains available for the home improvement products.

In this report we present how this trend has been evolving over the past 5 years on a European level (chapter 1), and on country level (chapter 2). We also look into consumers' attitude towards learning DIY skills and bringing them to practice. In chapter 4 you will also find these trend insights for your product category.

The **topics** that will be covered in 2019 are:

- Q1 Focus: **Orientation**. Theme topic: **New ways of searching**
- Q2 Focus: **Purchase channels**. Theme topic: **Amazon, threats & opportunities**
- Q3 Focus: **Branding**. Theme topic: **Buying projects instead of products**
- Q4 Focus: **DIY vs DIFM**. Theme topic: **Multi-year developments in home improvement**

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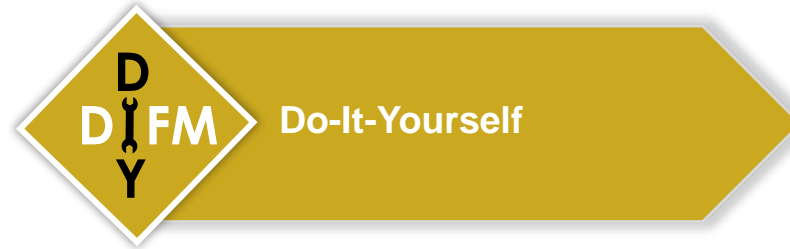
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If there are any suggestions or remarks on our reports, please let us know. We're always looking for ways to improve, so your feedback is more than welcome.

Key Findings



- Key finding 1 (in full report)



- Key finding 2 (in full report)



- Key finding 3 (in full report)



European
developments



European overview
Focus on DIY vs DIFM



Country overview
Focus on DIY vs DIFM



Home improvement
per category

Market trends affecting the DIY market

DIY stores need people who want to do DIY jobs. Young people are less skilled and for this reason more likely to outsource the jobs. Consumers who traditionally do DIY jobs are becoming older and as the years go by, they grab the toolbox less often. The contractors who are hired to do the home improvement jobs often do not buy their products at the DIY store, but at professional wholesalers.

Currently, XX% of all European home improvement jobs are done by consumers themselves (see page 9). In 2014 this was still XX%. This means that ...

Of course, this trend has already been expected years ago by the DIY retailers, and several solutions are being offered to the consumer. Some examples of these solutions are installation services...

Not only the generational changes have an effect on the DIY market. Two other market circumstances are affecting the DIY market as well.

- First, there is an increase in the number of single-person households. XX% of households in the EU were single-person households without children in 2017, compared to XX% in 2010. People who live alone ...
- Second, the requirements to get a mortgage have become stricter since the financial crisis. It became more difficult for homebuyers to obtain additional funding in their mortgage on top of the purchase price...

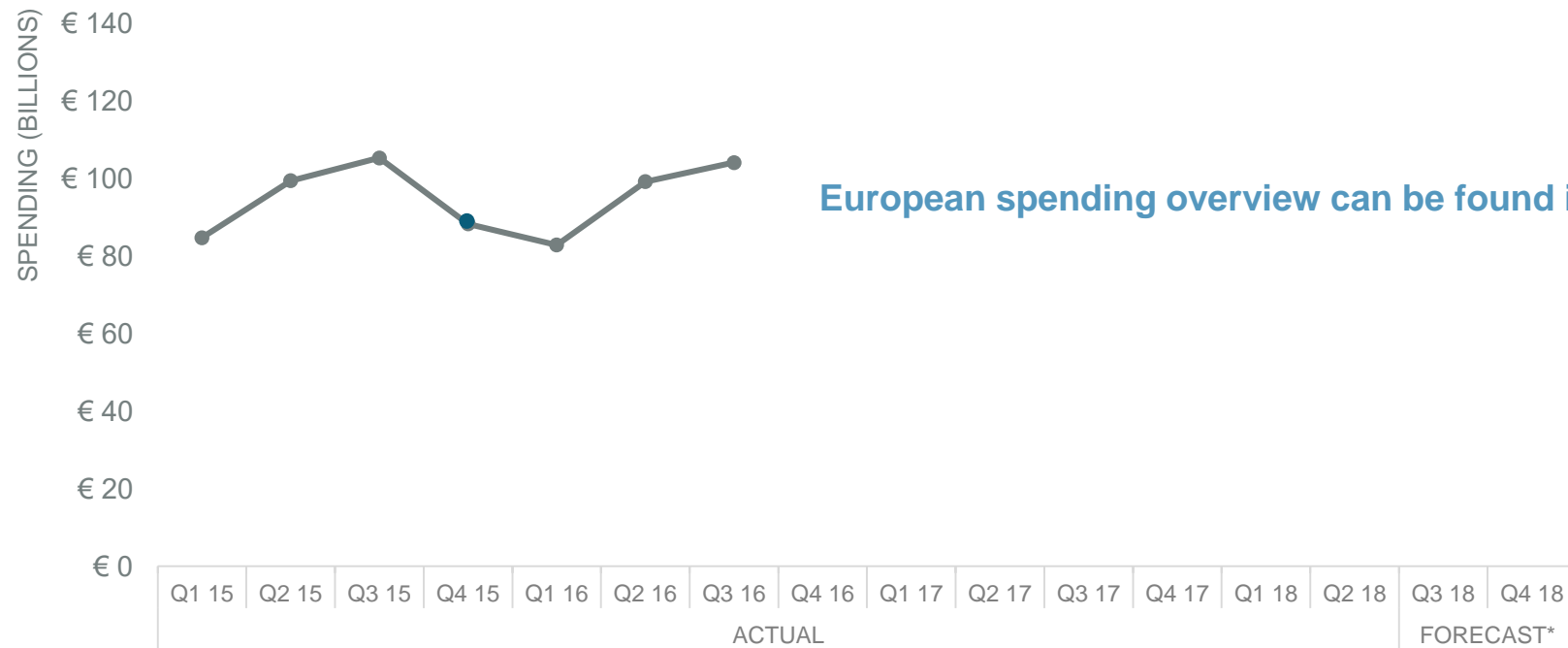
Unfortunately, there is not much the DIY sector can do about these two circumstances. Therefore...

Importance of gaining knowledge on home improvement

Conclusion can be found in full report.

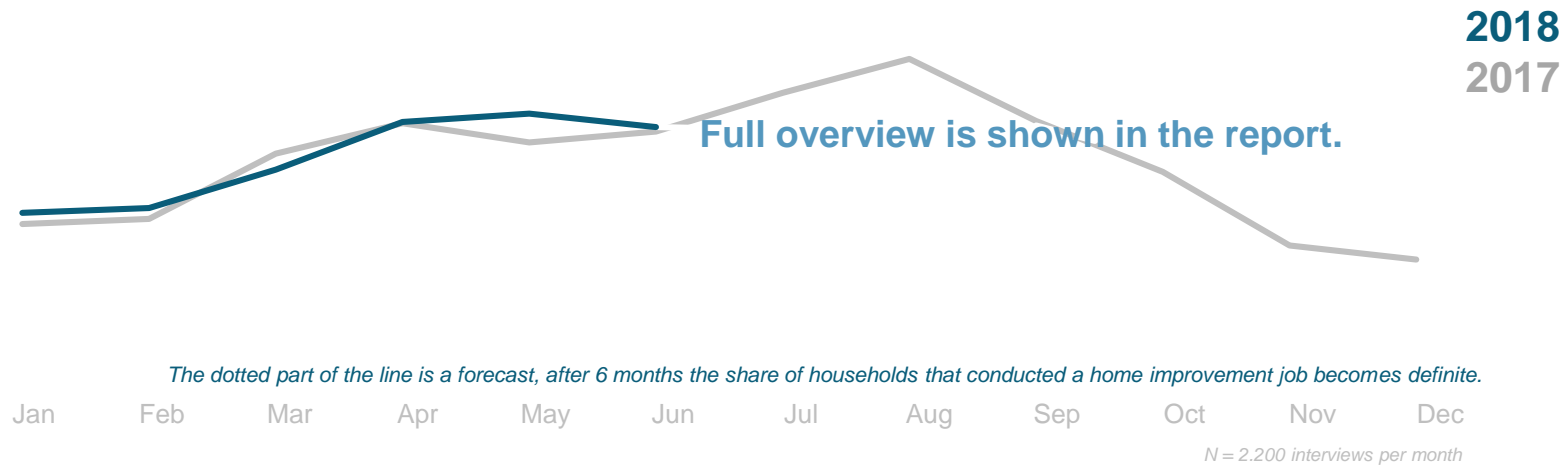


European spending on home improvement (labour + material)

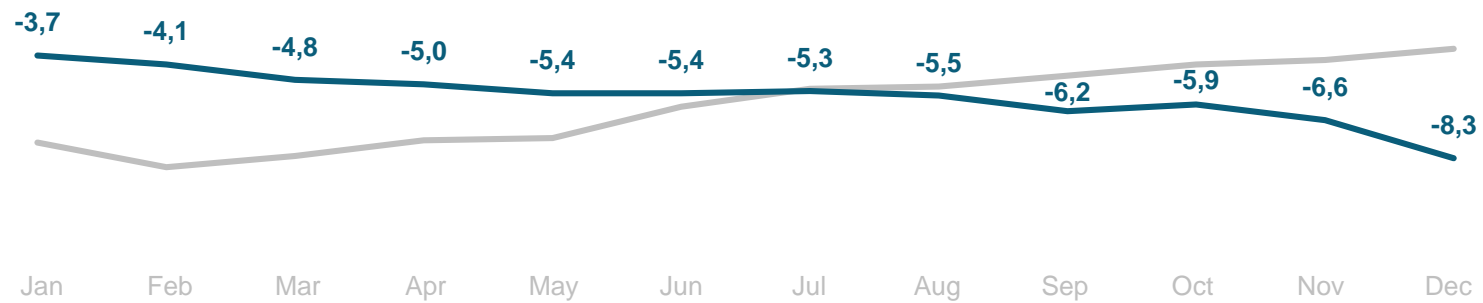


European spending overview can be found in the report.

Share of households conducting a home improvement job

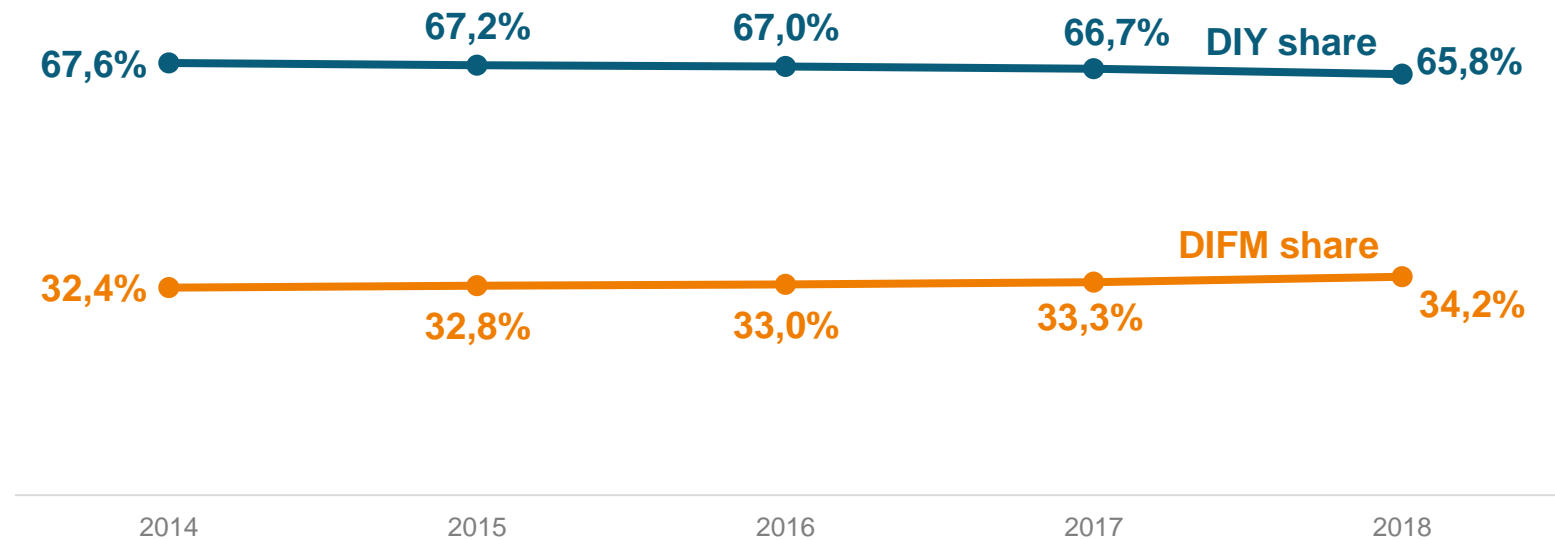


Consumer confidence level



DIY/DIFM home improvement market

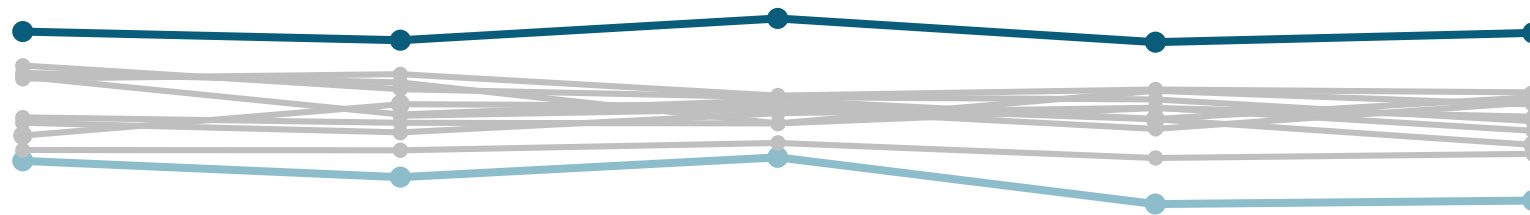
A high percentage of home improvement jobs are still DIY jobs. However, we see a clear trend towards DIFM developing over the years, since it has increased with almost two percent point since 2014.



DIY home improvement market

Country X consumers are still the most involved in DIY projects.

Traditionally, the DIY market is the least popular in Country Y, which is also the case in 2018.



Full overview in the report.

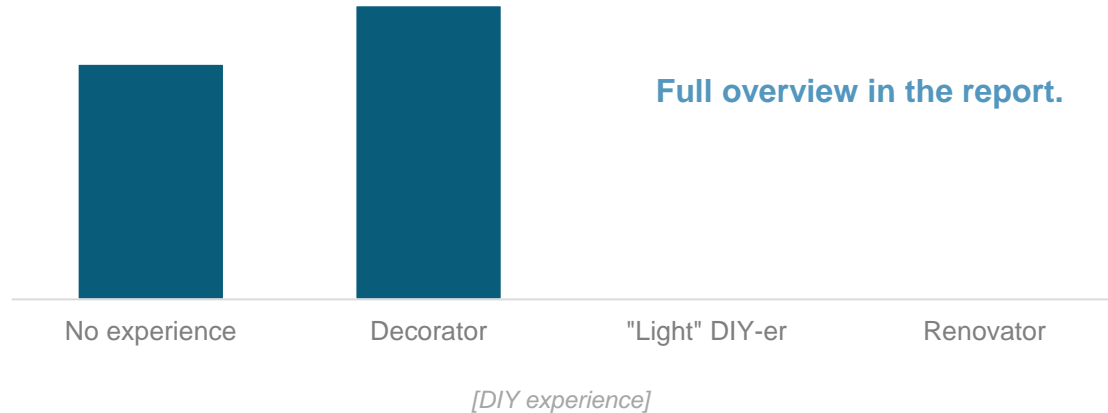
% of people who did a project on their own (DIY)



Q: Who was involved in (performed) the work activities?
N approximately 13.000 interviews per year.

Whether [or not] a consumer decided to conduct a home improvement job on his own, **depends on his DIY experience.**

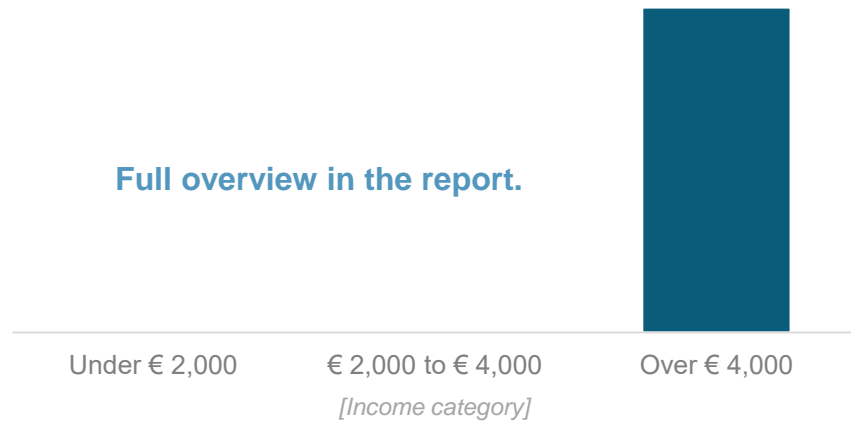
% of people who did a project on their own (DIY)



DIY home improvement market – per income category

European consumers with a lower income are more likely to ...

% of people who did a project on their own (DIY)



Full overview in the report.

DIY home improvement market – per age group

One of the key drivers of DIFM is aging. The older consumers are looking for....

% of people who did a project on their own (DIY)



Full overview in the report.





European
developments



European overview
Focus on DIY vs DIFM



Country overview
Focus on DIY vs DIFM



Home improvement
per category

Theme questions covered in the report

In this chapter the European overview regarding DIY and DIFM jobs will be shown. The respondents were asked the following questions about **DIY & DIFM**:



To what degree do you like to do decorative DIY jobs yourself?
To what degree do you like to do constructive DIY jobs yourself?
Would you like to learn more DIY skills?
How do you prefer to learn more about doing DIY jobs?
Where do you expect to get advice for doing a DIY job yourself?
What would make you do more of your home improvement jobs yourself?



For which of the following home improvement jobs would you prefer to hire a professional to do the job for you?
In what order would you select the products and professional?
How many times a year do you hire a professional to do a home improvement job for you?
What are, for you, the most important selection criteria when selecting a professional to do a home improvement job for you?
Instead of hiring a professional yourself it is also possible to get a professional via the installation service that is offered by a store or website where you purchased your home improvement products. What are the most important aspects that this installation service should offer you?
How do you normally select a professional for your home improvement jobs?
Do you prefer to hire a professional that can do all sort of home improvement jobs or do you prefer to hire a specialist for various tasks?
What would make you outsource more of your home improvement jobs to professionals?



European overview
Focus on DIY vs DIFM



European overview
Focus on DIY vs DIFM



Country overview
Focus on DIY vs DIFM



Home improvement
per category

Country overview

INTRODUCTION | MARKET SIZE & DIY/DIFM DEVELOPMENT | KEY FACTS - DIY | KEY FACTS - DIFM

The European overview regarding online buying and purchase channels for home improvement jobs was illustrated in the previous chapters. In this chapter, we will zoom in on the separate countries to give a more specific view of the home improvement market in Europe.

We will start with the penetration rate of the home improvement jobs. This is reported by the percentage of households that have done at least one home improvement job in a particular quarter. On the same slide, development of the DIY/DIFM jobs over years will be presented.

Next, all the information on the theme part is shown per country .

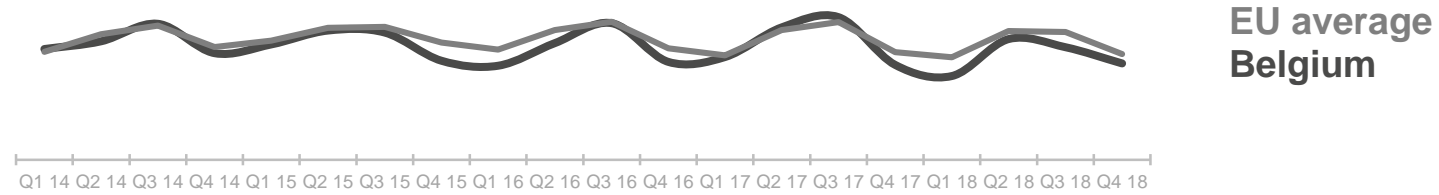


Country specific key findings are presented for all 11 countries in the report.

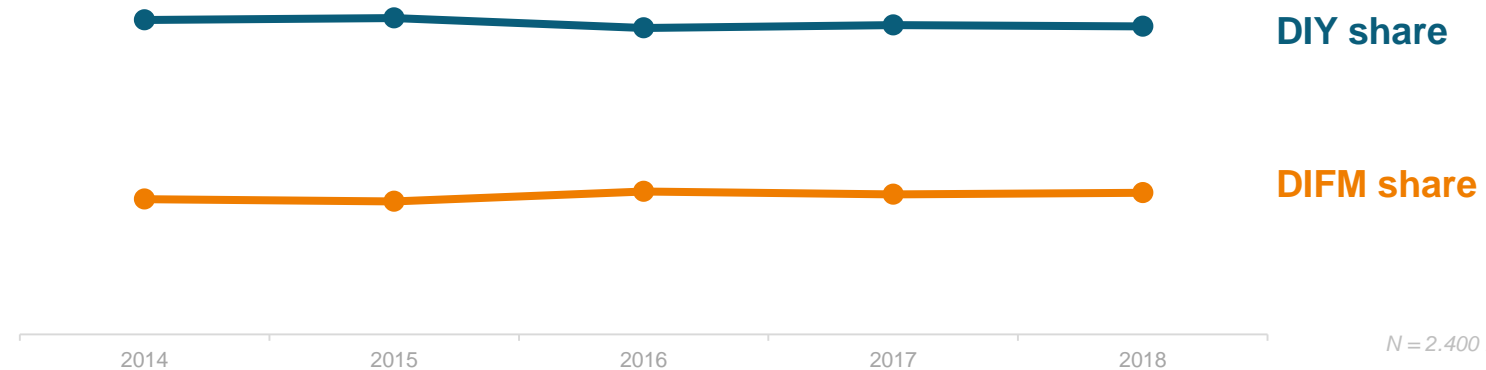




Number of home improvement jobs



DIY/DIFM development over years

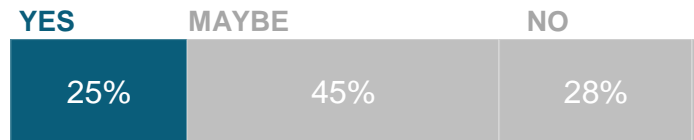




About **DIY** behaviour in Belgium

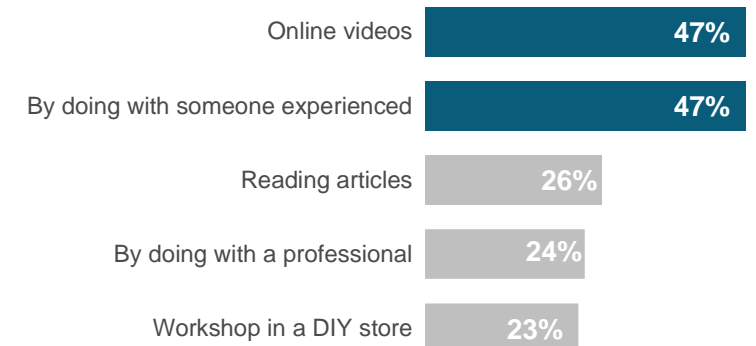
25% of Belgian consumers would like **to learn more** DIY skills. They prefer to learn it by doing the job with someone experienced, or by watching online videos on Google. They would do more DIY if their skills would be improved.

Would you like to **learn more DIY skills**?



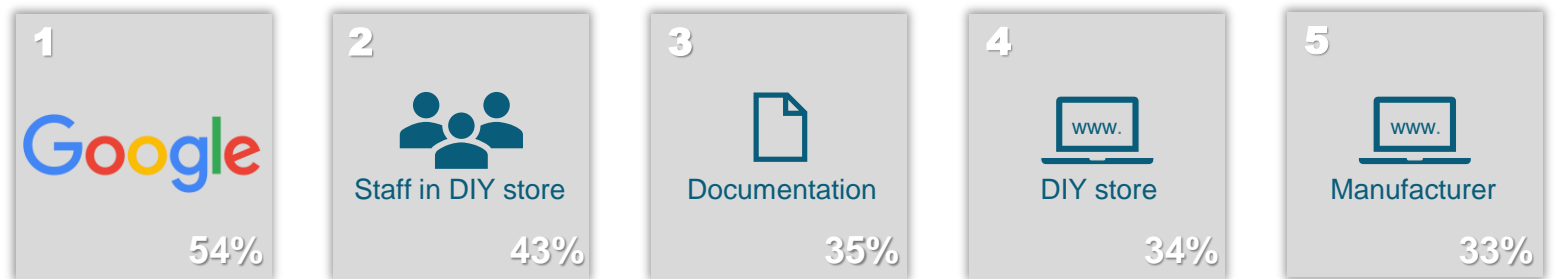
HOW? – Top 5

Yes/Maybe

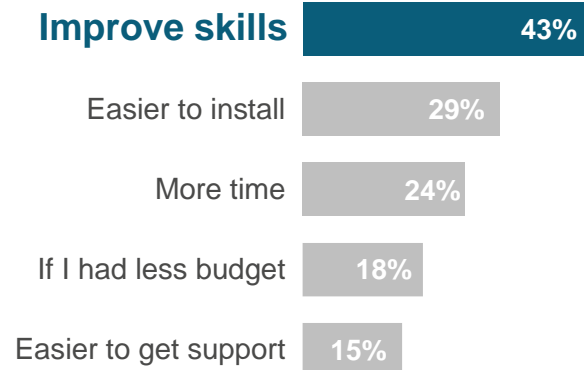


WHERE? – Top 5

Yes/Maybe



Main **motivations** for doing more DIY





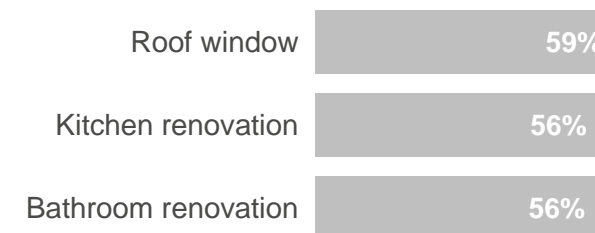
About **DIFM** behaviour in Belgium

Belgian consumers mainly hire a professional to do a **roof window installation or kitchen/bathroom renovation**. They prefer to hire **a specialist** based on his **reliability**. They usually hire him via friends and family.

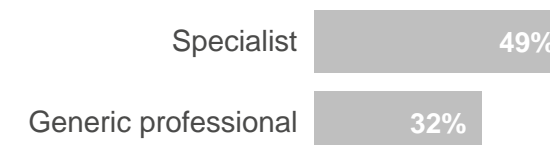
The main limitation for DIFM jobs is expenses. They would do more DIFM **if hiring was cheaper**.

PREFERRED JOB

[Top-3]

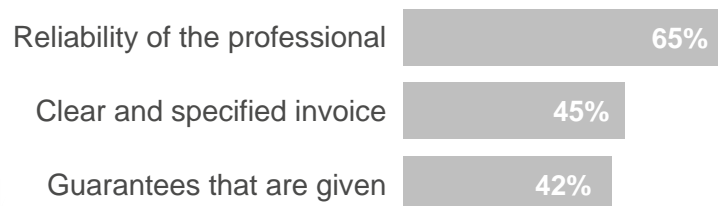


PREFERRED PROFESSIONAL



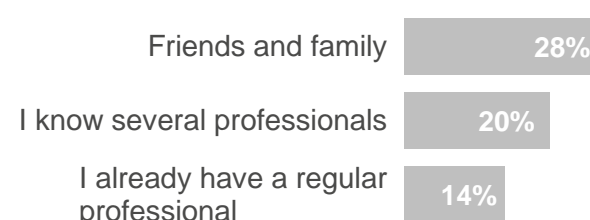
SELECTION CRITERIA

[Top-3]

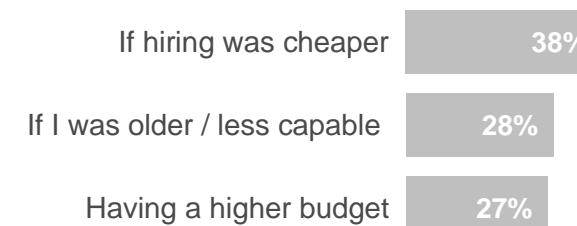


SELECTION METHOD

[Top-3]



WHEN TO CONSIDER MORE DIFM?





European overview
Focus on DIY vs DIFM



European overview
Focus on DIY vs DIFM



Country overview
Focus on DIY vs DIFM



**Home improvement
per category**

Paint

Available product categories:

- Adhesives & sealants
- Bathroom products
- Fixings
- Flooring
- HVAC products
- Insulation
- Kitchen products
- Paint and paint supplies
- Tools
- Roof daylight
- Safety & security
- Wallpaper
- Window decoration

Share of households conducting a paint job

[Total]

2017
2018



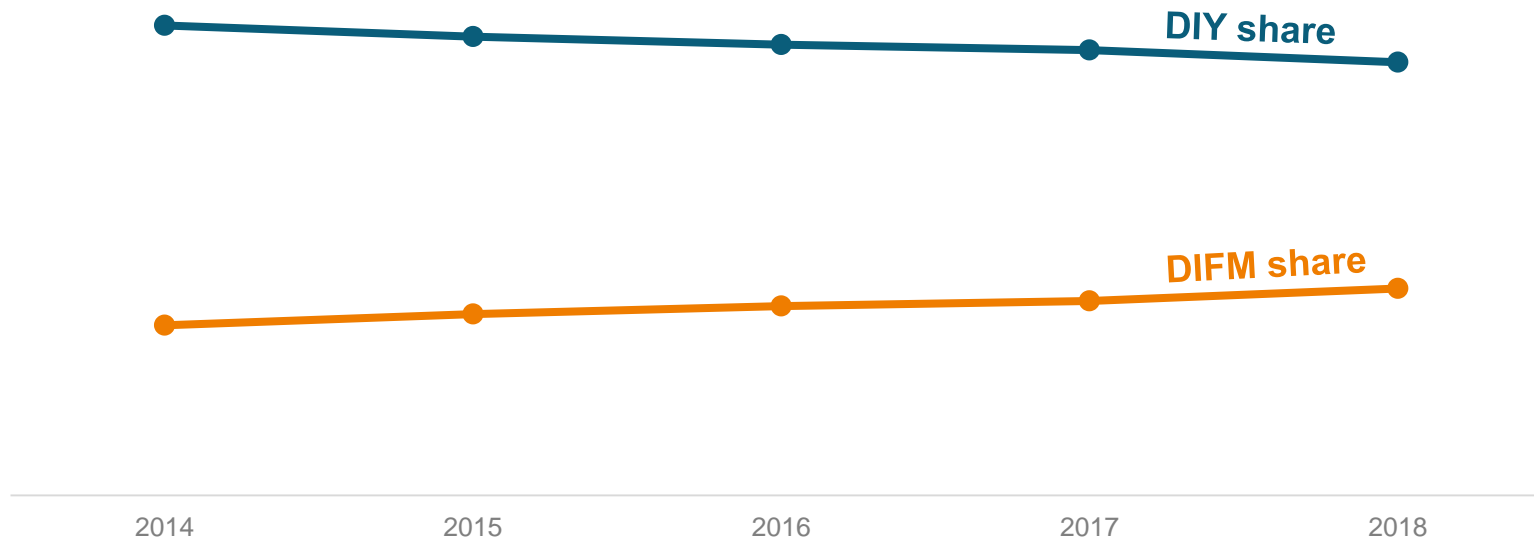
Share of households conducting a paint job

[Quarter comparison per country]

Q4-17
Q4-18



DIY/DIFM home improvement market (EU)



Doing a paint job is most often a DIY job, but the share of DIFM is growing over the years.

DIY/DIFM development (per country)



DIY

2014

2015

2016

2017

2018

Full overview is shown in the report.

DIFM

2014

2015

2016

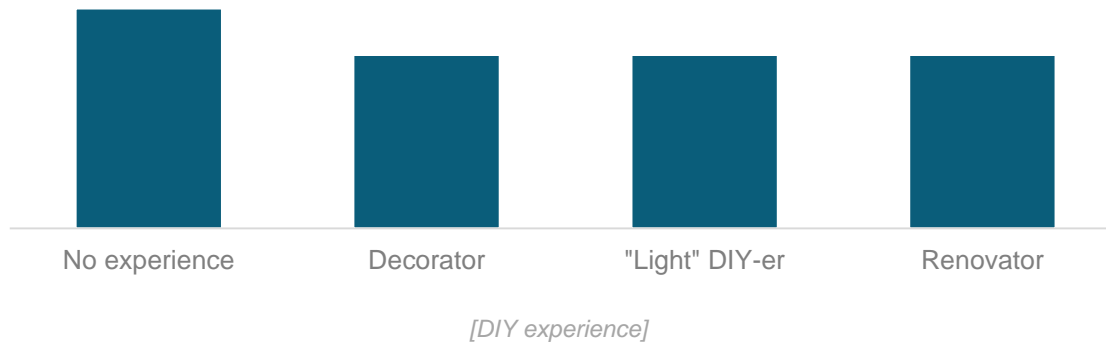
2017

2018

DIY home improvement market – per DIY experience

% of people who did a project on their own (DIY)

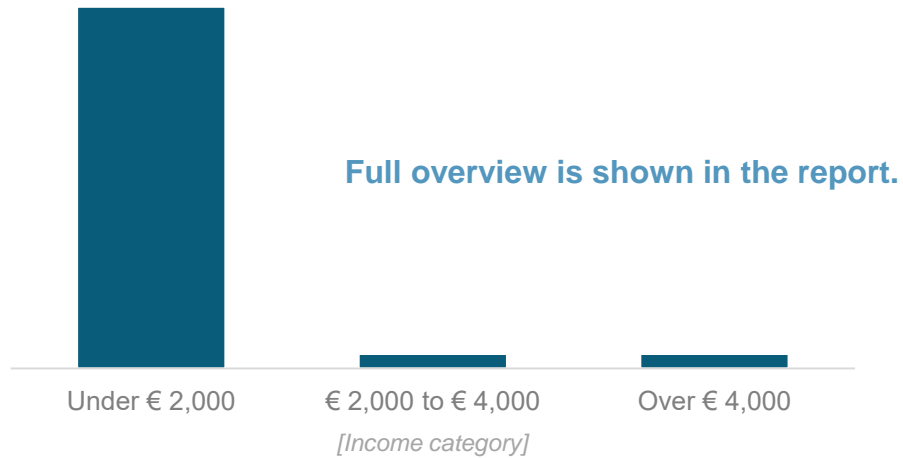
Full overview is shown in the report.



The more DIY experience a consumer has, the more likely ...

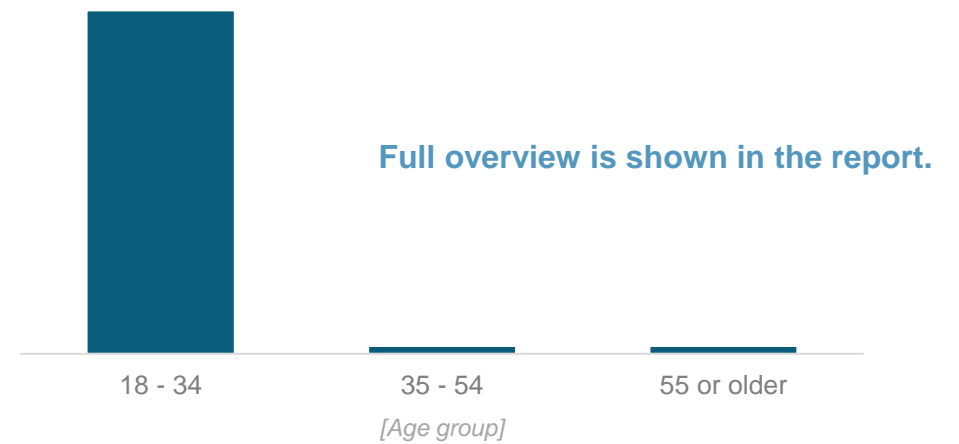
DIY home improvement market – per income category

% of people who did a project on their own (DIY)



DIY home improvement market – per age group

% of people who did a project on their own (DIY)





APPENDIX:

FOCUS ON METHODOLOGY

Background of the sample

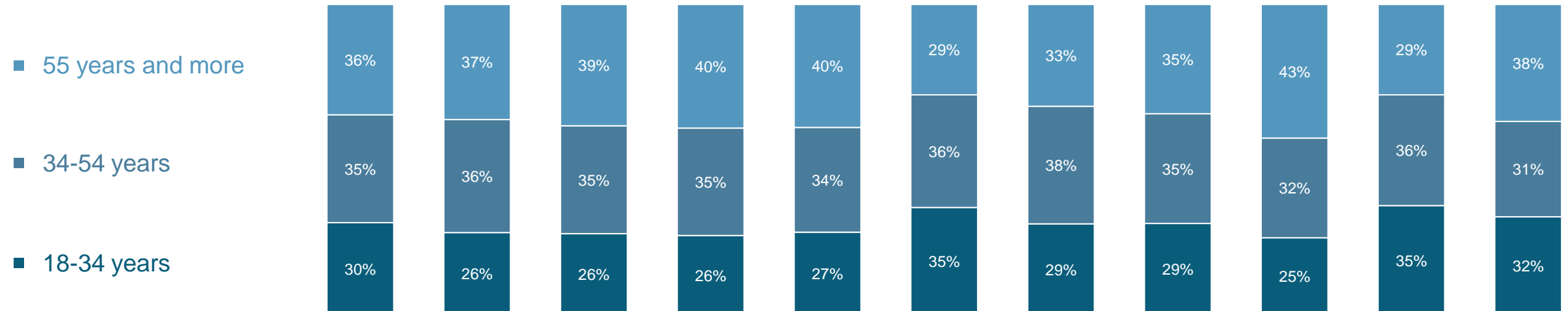
Overview

We use a national representative sample for our study. This includes all type of consumers aged 18+. Men and women, house renters and owners, people who conduct DIY jobs themselves and people that outsource it to professionals.

GENDER DISTRIBUTION

% of interviewed men	51%	48%	48%	48%	45%	50%	55%	49%	50%	52%	49%
% of interviewed women	49%	52%	52%	52%	55%	50%	45%	51%	50%	48%	51%

AGE DISTRIBUTION



INCLUDED CATEGORIES

General home improvement figures are based on **37 selected products**:

- | | |
|-----------------------------|------------------------|
| 1 "BATHROOM" | 20 "FLOOR" |
| 2 "KITCHEN PLUS appliances" | 21 "RADIATOR" |
| 3 "GARDEN" | 22 "RADHEAT" |
| 4 "LIVING ROOM" | 23 "SWITCH MATERIAL" |
| 5 "BEDROOM" | 24 "SEALANTS" |
| 6 "ATTIC" | 25 "MORTARS" |
| 7 "OTHER ROOMS" | 26 "WALLPAPER" |
| 8 "EXTERIOR" | 27 "INTERIOR DOOR" |
| 9 "HVAC" | 28 "WINDOW DECORATION" |
| 10 "SECURITY PRODUCTS" | 29 "TILES" |
| 11 "TOOLS" | 30 "PLUMBING" |
| 12 "GYPSUM BLOCKS" | 31 "TILE GROUT" |
| 13 "DRYWALL" | 32 "FILLER" |
| 14 "WOOD&BOARD MATERIAL" | 33 "TAPES" |
| 15 "INSULATION MATERIAL" | 34 "SANDPAPER" |
| 16 "PLASTER" | 35 "BRUSH" |
| 17 "PAINT" | 36 "ROLLER" |
| 18 "LIGHTING" | 37 "PAINT SPRAYER" |
| 19 "TILE ADHESIVES" | |

WEIGHING FACTOR

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

SAMPLE SIZE

1st chapter: EU results are based on 26,400 interviews per year

2nd chapter – Theme part: EU level based on 6,282 interviews conducted in Q4-18

3rd chapter – Incidence rate (number of home improvement jobs) is based on 2,400 per country; Theme questions on approx. 600 interviews per country

4th chapter – sample size depends on the incidence rate of the product category (see page 65 – share of households conducting a job)

USP Marketing Consultancy

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