

DIY Retailing – Europe – 2022

Report Price: £3195 | \$4400 | €3850

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- The impact of COVID-19 on the DIY retailing sector and how it is recovering from this
- The impact of rising living costs on European consumers and how this is affecting the DIY retailing sector
- The winners and losers in the DIY retailing sector as we emerge into the post-COVID recovery phase
- How people shop for DIY and which retailers they use
- Changes to consumer attitudes and priorities as a result of the pandemic
- Interest in a variety of DIY related services and innovations among DIY shoppers

Overall, DIY has been one of the more resilient retail sectors during the pandemic. In 2021, the sales of DIY specialist retailers continued to increase recording 3.9% growth across the five leading economies of Europe (the UK, France, Germany, Italy and Spain). As consumers started projects that they planned during lockdown, sector sales in 2021 were over €3.3 billion larger than in 2020. The outlook for 2022 and beyond is uncertain due to the geopolitical situation in Europe, the level of inflation affecting households and the still fragile normalisation of the health situation. The ongoing conflict in Ukraine, coming in the wake of a pandemic which was tough for many DIY retailers, looks set to inflict further pain by putting severe pressure on household finances, which had already been coming under pressure from energy price hikes. However, we expect the sector to remain resilient, albeit not at the growth levels seen in the last two years.

In addition to the cost-of-living crisis and consumers' concerns around high inflation, the biggest threat to the DIY retailing market is non-specialist retailers encroaching on specialists' traditional territory, including generalist online-only retailers like Amazon. Mintel consumer research confirms that Amazon is now an important player in the big five markets in terms of penetration. The popularity of buying DIY goods online continues to increase across Europe, turbocharged



“The DIY markets across the leading European countries vary a great deal, due in part to differences in home ownership levels. DIY has been one of the more resilient retail sectors during the pandemic. In 2021, specialists' sales continued to increase, recording 3.9% growth across the five leading economies of Europe.”

– Utku Tansel, European Retail Analyst

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

DIY Retailing - Europe - 2022

Report Price: £3195 | \$4400 | €3850

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



by the COVID-19 pandemic. In the UK, Germany and Italy, the online giant is the top retailer for online purchases while in both France and Spain it is the second most popular choice by consumers purchasing DIY goods online.

There are good opportunities for retailers to take a stronger position on DIY goods aimed at beginners, rapid delivery options, second-hand or refurbished items as well as flexible payment options with consumers wanting to see more action in these areas. In addition, maximising in-store experiential retailing, faster delivery as well as personalised expert advice can create a point of differentiation.

Our research for this report also shows that 41% of respondents in Spain, 34% in Italy, 30% in the UK, 29% in Germany, and 21% in France would like to see DIY goods aimed at beginners when it comes to innovations across Europe. Specialist DIY goods retailers could look at creating areas in-store and online dedicated to beginners where customers can quickly and easily choose products.

Furthermore, thanks to the pandemic there is now significant confidence among many European consumers to embark on DIY and home improvement tasks, whether that is upcycling items, doing home improvements or repairs. This has led to some attitude shifts when purchasing DIY goods. As such, some 41% – 58% of European consumers across the five countries say that they now would be more confident in doing home improvements themselves (eg putting up shelves, painting walls) than they were before the outbreak. This is likely to be driven by both a desire to save money but also may be more sustainable by recycling/reusing existing items rather than buying new. This opens up real opportunities for DIY retailers. They can play a role in helping self-sufficiency – through shared expertise and lessons. With this they can help generate pride, self-worth and reward, not just relief or practicality, making DIY pleasurable in its own right, rather than just hard work.

This report series covers the DIY market in five large Western European countries – the UK, France, Germany, Italy and Spain.

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **Report scope**
- **DIY stores**
- **Market size**
Figure 1: Coicop classifications used for the Mintel market size
- **Financial definitions**
- **Abbreviations**
- **VAT rates**
Figure 2: VAT rates around Europe, 2017-22

EXECUTIVE SUMMARY – EUROPE – THE MARKET

- **Mintel DIY market size**
Figure 3: Europe Big 5: spending on DIY products, including VAT, 2017-21
- **Spending on DIY goods per capita**
Figure 4: Europe: estimated spending on DIY products per capita, including VAT, 2021
- **Impact of COVID and cost of living crisis**
Figure 5: Europe Big 5: changes to spending habits as a result of the COVID-19 pandemic, 2022
Figure 6: Europe: financial impact of the COVID-19 pandemic, 2022
- **DIY specialists' sales**
Figure 7: Europe: sales by specialist DIY retailers (excluding VAT), 2017-23
- **Market drivers**
- **Home ownership**
Figure 8: Europe: proportion of owner occupiers, 2020
- **Consumer spending intentions**
Figure 9: Europe: consumers' planned spending on housing and home, Q2 2022
- **Companies and brands**
Figure 10: Europe: leading specialist DIY retailers, sales, 2016/17-2020/21
Figure 11: Europe: leading specialist DIY retailers, outlets, 2016/17-2020/21
- **Market shares**
Figure 12: Europe: leading specialist DIY retailers' estimated shares of total DIY spending in Big 5 (France, Germany, Italy, Spain and UK), 2016/17-2020/21
- **Online**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

DIY Retailing - Europe - 2022

Report Price: £3195 | \$4400 | €3850

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 13: estimated online sales of DIY products, 2021

Figure 14: Europe Big 5: changes to spending habits as a result of the COVID-19 pandemic, 2022

- **The five-year outlook for DIY retailing**

Figure 15: Outlook for DIY retailing, May 2022

EXECUTIVE SUMMARY – EUROPE – THE CONSUMER

- **The research**

- **Where they shop for DIY products**

Figure 16: Europe: where DIY/home improvement products were bought in the last 12 months in-store, 2022

Figure 17: Europe: where DIY/home improvement products were bought in the last 12 months online, 2022

Figure 18: Europe: where DIY/home improvement products were bought in the last 12 months by gender, 2022

- **The impact of COVID-19 on DIY/home improvement behaviours and spending**

Figure 19: Europe: attitudes to buying DIY products, 2022

- **Interest in DIY/home improvement innovations**

Figure 20: Interest in DIY innovations, 2022

EXECUTIVE SUMMARY – EUROPE – INNOVATIONS AND LAUNCH ACTIVITY

- **Small-format DIY stores gain popularity**

Figure 21: Homebase: UK DIY specialist

- **Digitization rises higher up on the agenda**

- **Conscious consumerism comes to the fore**

- **Specialists maximise in-store experiential retailing**

- **Race to provide faster delivery**

Figure 22: Screwfix Sprint

- **Personalised expert advice can create a point of differentiation**

FRANCE

- **Overview**

- **Key issues covered in this Report**

- **Market context**

- **Areas covered in this Report**

Figure 23: Coicop classifications used for the Mintel market size

- **Executive summary**

- **The five-year outlook for DIY Retailing**

Figure 24: DIY Retailing outlook, 2022–27

- **The market**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **DIY spending reached €31.5 billion in 2021**
Figure 25: France: DIY products – the Mintel market size (including VAT), 2016–21
- **A buoyant housing market and state support for energy-efficiency**
- **But the cost of living could hold back growth in 2022**
- **DIY retailers have thrived over the last two years**
Figure 26: France: DIY specialists, sales (excluding VAT), 2016–23
- **The consumer**
Figure 27: France: engagement in DIY shopping, by monthly income bracket and housing tenure, 2022
- **Online shopping for DIY has strengthened**
Figure 28: France: demographics of online DIY shoppers, 2021 and 2022
- **Leroy Merlin has a clear lead**
Figure 29: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, 2022
- **Confidence in DIY has increased**
Figure 30: France: agreement with statements about COVID-19/coronavirus outbreak and purchasing items for DIY/home improvements, 2022
- **Opportunities in “Do-It-With-Me”**
- **Second-hand could be a new revenue stream**
- **Security when hiring a professional**
Figure 31: France: interest in DIY/home improvement innovations/enhancements, 2022
- **Companies and brands**
- **Leroy Merlin dominates the retail sector**
Figure 32: France: Leading specialist DIY retailers: shares of all DIY specialists’ sales, 2021
- **New store formats**
- **The pandemic has boosted online shopping**
- **Issues and Insights**
- **How can DIY retailers help consumers through the cost of living crisis?**
- **Are DIY retailers lagging behind on sustainability?**
- **Market size and performance.**
- **DIY spending reached €31.5 billion in 2021**
Figure 33: France: DIY products – the Mintel market size (including VAT), 2017–21
- **Retail sector size and forecast**
- **DIY retailers have thrived over the last two years**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 34: France: DIY specialists, sales (excluding VAT), 2017-23

- **Channels to market**
- **Market drivers**
- **Ukraine represents a shock to the French economy**
- **The government's shield on energy price rises**

Figure 35: France: Key economic projections, % annual change, 2019-24

- **Employment has been resilient**
- **Prices of DIY and building materials are rocketing**

Figure 36: France: Consumer prices* of DIY-related categories, annual % change, 2017-21

Figure 37: France: Consumer price inflation (HICP*) of DIY-related categories, annual % change, 2020-22

- **Consumer confidence has slipped from its recent high point**

Figure 38: France: trends in levels of consumer confidence*, 2020-22

- **People are increasingly worried about the cost of living**

Figure 39: France: Consumer concerns about household finances, 2022

- **The conflict in Ukraine will hurt French consumers**

Figure 40: France: Expected impact of the Ukraine crisis on French Consumers, 2022

- **The housing market – demand is driving higher prices**
- **State aid to promote energy efficient home improvement**
- **The consumer**
- **Who buys DIY products**
- **Fewer people shopped for DIY in 2021**
- **An opportunity to sell more to younger women**

Figure 41: France: engagement in DIY shopping, by gender and age, 2022

- **Homeowners and the more affluent shop most**

Figure 42: France: engagement in DIY shopping, by monthly income bracket and housing tenure, 2022

- **Dads are big spenders**

Figure 43: France: engagement in DIY shopping, by life stage and parental status, 2022

- **Online shopping for DIY has strengthened**

Figure 44: France: demographics of online DIY shoppers, 2021 and 2022

- **Specialists remain the most popular place to shop**
- **Leroy Merlin has a clear lead**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 45: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, 2022

- Trend data**

Figure 46: France: percentage of shoppers using leading specialist DIY retailers, 2018-22*

- Amazon is behind Leroy Merlin online**

Figure 47: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, 2022

- Hypermarkets and generalist online retailers most popular amongst women**

Figure 48: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, by gender, 2022

- Leroy Merlin appeals to older shoppers...**

Figure 49: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, by age, 2022

-and the more affluent**

Figure 50: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, by age, 2022

- The impact of COVID-19 on DIY/home improvement behaviours and spending**

- Consumers are increasingly confident in their DIY skills**

Figure 51: France: agreement with statements about COVID-19/coronavirus outbreak and purchasing items for DIY/home improvements, 2022

- A shift in priorities could take spend away from DIY**

- Interest in DIY/home improvement innovations/enhancements**

Figure 52: France: interest in DIY/home improvement innovations/enhancements, 2022

- Help keen but inexperienced consumers to help themselves**

Figure 53: France: interest in DIY/home improvement innovations/enhancements, beginners' ranges, 2022

- Second-hand could be a new revenue stream**

Figure 54: France: interest in DIY/home improvement innovations/enhancements, second hand, 2022

- Potential for "do it with me"**

Figure 55: France: agreement with statements about COVID-19/coronavirus outbreak and purchasing items for DIY/home improvements, remote guidance, 2022

- Security when hiring a professional**

Figure 56: France: agreement with statements about COVID-19/coronavirus outbreak and purchasing items for DIY/home improvements, network of tradesmen, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Companies and brands**
- **Leading players**
- **Synergies between Leroy Merlin and Weldom sustain growth at Adeo**
- **Recovery continuing at Kingfisher**
- **Ambitions grow at Les Mousquetaires as it assimilates BricoPrivé**
- **Mr Bricolage benefiting from localism trend**
Figure 57: France: Leading specialist DIY retailers: sales, 2017-21
Figure 58: France: Leading specialist DIY retailers: outlet numbers, 2017-21
- **Market shares**
Figure 59: France: Leading specialist DIY retailers: shares of all DIY retailers sales, 2017-21
- **Online**
- **Online activity**
- **Online sales of DIY**
- **Leading online players**
- **Appendix: Data sources, consumer research methodology and abbreviations**
- **Abbreviations**
- **Consumer research methodology**
- **Data sources**

ITALY

- **Overview**
- **Key issues covered in this Report**
- **Market context**
- **Areas covered in this report**
- **Products covered in this Report**
Figure 60: Coicop classifications used for the Mintel market size
- **Executive Summary**
- **The five-year outlook for Sports Goods Retailing**
Figure 61: Italy: DIY Retailing outlook, 2022-27
- **The market**
- **Market size and forecast**
Figure 62: Italy: Consumer spending on DIY products (including VAT), 2017-21
- **Retail sector size and forecast**
Figure 63: Italy: DIY specialist retailers' sales (excluding VAT), 2017-23

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

- **Market drivers**
- **The consumer**
- **Purchasing of DIY/home improvement products**
Figure 64: Italy: percentage purchasing DIY/home improvement products in the last 12 months, 2019-22
- **Channels used to purchase DIY/home improvement products**
Figure 65: Italy: purchasing of DIY/home improvement products in the last 12 months, by channel, 2022
- **Where DIY/home improvement products are purchased**
Figure 66: Italy: where DIY/home improvement products have been purchased in the last 12 months, by retailer, 2022
- **The impact of COVID-19 on DIY/home improvement behaviours and spending**
Figure 67: Italy: agreement with statements about COVID-19/coronavirus outbreak and purchasing items for DIY/home improvements, 2022
- **Interest in DIY/home improvement innovations/enhancements**
Figure 68: Italy: interest in DIY/home improvement innovations/enhancements, 2022
- **Companies and brands**
Figure 69: Italy: Leading DIY specialists, shares of total DIY specialists' sales, 2021
- **Issues & Insights**
- **How should DIY retailers be responding to the growing cost of living crisis?**
- **Italian household finances are under pressure**
- **Offer more flexible payment options**
- **Be transparent with customers about price increases**
- **Enable consumers to still do popular DIY tasks on a budget**
- **Use flash deals to create a sense of urgency**
- **Don't forget Italians who are not impacted by the cost of living crisis**
- **Where are the opportunities for DIY retailers to increase their revenues?**
- **Take advantage of growing confidence of Italians to do it for themselves**
- **More 'do it for me' – particularly after the cost of living crisis has died down.**
- **Segmenting the in-store proposition**
- **Segmenting the delivery proposition**
- **Customise and personalise**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Reach out to consumers with a sustainable business model**

- **Market size and performance**

Figure 70: Italy: DIY products – The Mintel market size (including VAT), 2017–21

Figure 71: Italy: Mintel DIY market size: estimated breakdown by product category, 2021

- **Segmentation**

- **Retail sector size and performance**

Figure 72: Italy: DIY specialists, sales (excluding VAT), 2017–23

- **Channels to market**

- **Market drivers**

- **The economy**

- **Ukraine conflict will affect the Italian economy**

- **Inflation**

Figure 73: Italy: consumer price inflation*, annual % change, 2017–21

Figure 74: Italy: consumer price inflation* for sports equipment, annual % change, 2021–22

Figure 75: Italy: issues affecting consumers over the last two months, 2021 and 2022

- **Consumer confidence slips back once again**

Figure 76: Italy: trends in levels of consumer confidence*, 2021–22

- **The ongoing influence of COVID**

Figure 77: Italy: Changes in spending habits since the start of the outbreak, 2021–22

- **Technology ownership and usage**

Figure 78: Italy: activities done on household computers and smartphones in last three months*, 2021

- **Trends in home ownership**

Figure 79: Italy: comparison of home ownership levels with other major European countries, 2020

Figure 80: Italy: tenure types: owners vs tenants, % of households, 2010–20

- **Consumer spending plans**

Figure 81: Italy: consumers' planned spending on housing and home in the next 12 months, Q1 2019–Q2 2021*

- **The consumer**

- **Purchasing of DIY/home improvement products**

Figure 82: Italy: purchasing of DIY/home improvement products in the last 12 months, 2019–22

- **DIY/home improvement buyer demographics**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- Channels used to purchase DIY/home improvement products**

Figure 83: Italy: purchasing of DIY/home improvement products in the last 12 months, by channel, 2022

Figure 84: Italy: breakdown of DIY/home improvement shoppers by exclusive groups, 2022

- Where DIY/home improvement products are purchased**

Figure 85: Italy: where DIY/home improvement products have been purchased in the last 12 months, by retailer, 2022

- Retailer demographics**

- Three-year purchasing trends**

Figure 86: Italy: purchasing of DIY/home improvement products in-store/online in the last 12 months, by retailer, 2020-22

Figure 87: Italy: purchasing of DIY/home improvement products in-store in the last 12 months, by retailer, 2020-22

Figure 88: Italy: purchasing of DIY/home improvement products online in the last 12 months, by retailer, 2020-22

- The impact of COVID-19 on DIY/home improvement behaviours and spending**

- Growing confidence among Italian DIY/home improvement shoppers**

- More than half are looking for ways to improve their home**

- Over half are prioritising spending on their home**

Figure 89: Italy: agreement with statements about COVID-19/coronavirus outbreak and purchasing items for DIY/home improvements, 2022

- Brico io and Bricofer customers are particularly positive about DIY**

Figure 90: Italy: agreement with statements about COVID-19/coronavirus outbreak and purchasing items for DIY/home improvements, by selected specialist retailers shopped at in last 12 months, 2022

- Interest in DIY/home improvement innovations/enhancements**

- Italians are keen on products aimed at DIY beginners**

- Options for those who still want it done for them**

- I want it and I want it now**

- Scope for providing more sophisticated video advice?**

- Second-hand tools play to rising awareness of need for sustainability**

- Buy now, pay later to play increasingly important role in DIY purchases?**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Planning and assistance packages could bring retailers more 'do it for me' revenues**

Figure 91: Italy: interest in DIY/home improvement innovations/enhancements, 2022

- **Less affluent Bricofer shoppers welcome ranges for beginners**
- **Brico io shoppers show interest in buy now, pay later facilities**

Figure 92: Italy: interest in DIY/home improvement innovations/enhancements, by selected specialist retailers shopped at in last 12 months, 2022

- **Companies and brands**
- **ADEO is the dominant player**
- **Leroy Merlin broadens its horizons**
- **Bricocenter moves online, with a twist**
- **Bricoman rebrands to Tecnomat and gears up for dramatic expansion**
- **OBI starts to invest in Italy again**
- **Bricofer Group hit by estate downsize and COVID impact**
- **Brico io bucks the trend**
- **Brico OK grows rapidly despite lack of e-commerce**
- **ManoMano continues expansion of services**
- **Other players**

Figure 93: Italy: leading specialist DIY retailers: sales, 2017-21

Figure 94: Italy: leading specialist DIY retailers: outlet numbers, 2017-21

- **Market shares**

Figure 95: Italy: leading specialist DIY retailers: shares of all DIY specialists' sales, 2017-21

- **Online**
- **Online retailing in Italy**
- **Shopping online for DIY/home improvement products**
- **Online sales of DIY/home improvement products**
- **Leading online players**

Figure 96: Italy: search interest on Google, selected DIY retailers, last 12 months, 2021-22

- **Appendix: Data sources, consumer research methodology and abbreviations**
- **Abbreviations**
- **Consumer research methodology**
- **Data sources**
- **ISTITUTO CENTRALE DI STATISTICA (ISTAT) – Rome**
- **EUROSTAT – Luxembourg**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

SPAIN

- **Overview**
- **Key issues covered in this Report**
- **Market context**
- **Areas covered in this report**
- **Products covered in this Report**
Figure 97: Coicop classifications used for the Mintel market size
- **Executive Summary**
- **The five-year outlook for DIY Goods Retailing**
Figure 98: Spain: Outlook for DIY/home improvement retailing, 2022-26
- **The market**
- **Market size and forecast**
Figure 99: Spain: Mintel estimated consumer spending on DIY including VAT, 2017-21
- **Retail sector size and forecast**
Figure 100: Spain: DIY/hardware specialists, sales (excluding VAT), 2017-21
- **Market drivers**
- **Channels to market**
- **The consumer**
- **Who buys DIY products**
Figure 101: Spain: DIY/home improvement products shoppers, by age, in the last 12 months, 2020-22, March 2022
- **Where they shop for DIY products**
Figure 102: Spain: retailers used to purchase DIY /home improvement products in the last 12 months, 2022
- **COVID-19 related attitudes and behaviours in DIY**
Figure 103: Spain: COVID-19 related attitudes and behaviours in DIY, 2022
- **Interest in DIY innovations**
Figure 104: Spain: Interest in DIY innovations, 2022
- **Companies and brands**
- **Leading players**
- **Market shares**
Figure 105: Spain: leading specialist DIY retailers' estimated shares of all DIY specialists' sales, 2021
- **Online**
- **Issues and insights**
- **Asian low-cost DIY giant launches in Spain amidst rising cost of living crisis**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **3D home planning and assistance from anywhere, at any time**
- **Market size and performance**
- **Mintel DIY market size**
Figure 106: Spain: DIY products – The Mintel market size (including VAT), 2017–21
Figure 107: Spain: Mintel DIY market size: estimated breakdown by product category, 2021
- **Retail sector size and forecast**
- **DIY/hardware specialists' sales increase nearly 23% in 2021, but growth forecast to slow in 2022**
Figure 108: Spain: DIY/hardware specialists, sales (excluding VAT), 2017–23
- **Channels to market**
- **DIY specialists the biggest channel of distribution**
- **Market drivers**
- **Rising inflation dragging on private consumption to slow economic growth in 2022**
Figure 109: Spain: Key economic projections, % annual change, 2019–23
- **Inflation stoked by conflict in Ukraine**
Figure 110: Spain: Consumer prices * of categories relevant to sports goods, Annual % change, 2017–21
- **DIY-related products getting more expensive to shop**
Figure 111: Spain: Consumer price inflation (HICP *) of DIY-related categories, annual % change, 2020–22
- **Consumer confidence slumps to a level almost as low as in the first COVID-19 wave**
Figure 112: Spain: trends in levels of consumer confidence*, 2020–22
- **Value-for-money will be uppermost in the minds of consumers feeling the financial pinch**
Figure 113: Spain: financial impact of the COVID-19 pandemic, 2022
- **Over a fifth of consumers spending less on home and garden**
Figure 114: Spain: Changes to spending habits as a result of the COVID-19 pandemic, 2022
- **COVID-19 pandemic sparks a surge in home improvement intentions among tenants**
Figure 115: Spain: tenure types: owners vs tenants, % of households, 2012–20

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **Planned spending on home improvements slump amid cost of living crisis**

Figure 116: Spain: consumers' planned spending on housing and home, Q1 2019-Q2 2022

- **The conflict in Ukraine will hurt economy**

- **The consumer**

- **Who shops for DIY products**

- **Post-lockdown slowdown in DIY products purchasing**

Figure 117: Spain: DIY/home improvement products shoppers, by gender and age, 2021 and 2022

- **Homeowners and more affluent consumers the biggest purchasers of DIY products**

Figure 118: Spain: DIY/home improvement products shoppers, by net monthly household income and housing situation, 2022

- **In-store the most popular method of purchasing, but momentum shifting online**

Figure 119: Spain: Channels used to purchase DIY/home improvement products in the past 12 months, 2021 and 2022

- **DIY specialists the most popular purchasing destination**

Figure 120: Spain: Channels used to purchase DIY/home improvement products in the past year, by age group, 2022

- **Where they shop for DIY products**

- **Leroy Merlin the most popular destination for purchasing DIY products**

Figure 121: Spain: retailers used to purchase DIY /home improvement products in the last 12 months, 2022

- **Leroy Merlin now the biggest online destination for purchasing DIY products**

Figure 122: Spain: Retailers used to purchase DIY/home improvement products in the last 12 months, in-store or online, 2022

- **Trend data**

Figure 123: Spain: Percentage of shoppers using leading specialist DIY retailers, 2018-22*

- **Leroy Merlin's primary shoppers are the biggest purchasers of DIY products**

Figure 124: Spain: Leading specialists used to purchase DIY/home improvement products in the last 12 months, by age group, 2022

- **Brico Dépôt's Every Day Low Price policy reflected in the brand's shopper profile**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 125: Spain: Leading specialists used to purchase DIY/home improvement products in the last 12 months, by net monthly household income, 2022

- **COVID-19 related attitudes and behaviours in DIY**
- **COVID-19-inspired home improvement boom not over yet, but expected to cool as household budgets come under pressure**
- **Nearly six in ten consumers are DIY confident, but more could be done to support older people**
- **Concern for the environment and inflationary pressures fuelling surge in upcycling**
- **Nearly half of all DIY shoppers feel confident buying from an online-only retailer**

Figure 126: Spain: COVID-19 related attitudes and behaviours in DIY, 2022

- **Interest in DIY innovations**
- **Beginner ranges, faster home delivery and remote guidance for DIY tasks**

Figure 127: Spain: Interest in DIY innovations, 2022

- **Surge in DIY hobbyists driving demand for beginner-friendly ranges**

Figure 128: Spain: Interest in DIY innovations, beginners product ranges, 2022

- **The biggest buyers of DIY products want faster turnaround times for home deliveries**

Figure 129: Spain: Interest in DIY innovations, rapid delivery, 2022

- **Nearly a third of consumers interested in remote guidance for DIY tasks**

Figure 130: Spain: Interest in DIY innovations, remote guidance, 2022

- **Finding and booking local tradespeople in a few clicks**

Figure 131: Spain: Interest in DIY innovations, network of tradesmen, 2022

- **Financial pressures and conscious consumerism driving interest in second-hand purchasing**

Figure 132: Spain: Interest in DIY innovations, second-hand, 2022

- **Companies and brands**
- **Leroy Merlin small-format store expansion and debuts new garden-focused concept**
- **Brico Dépôt record sales on back of 90% growth in ecommerce**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Bauhaus expands tool rental collaboration**
- **Optimus Ferreteria new space focused on kitchenware and decoration**
- **El Corte Inglés absorbs loss-making Bricolaje Bricor into its department stores**
- **Pandemic-challenged BricoKing debt soars**
Figure 133: Spain: leading specialist DIY retailers: sales, 2017-21
Figure 134: Spain: leading specialist DIY retailers: outlet numbers, 2017-21
- **Market shares**
- **Leading brands aggregate share of sector sales plunges to its lowest level since 2017**
Figure 135: Spain: leading specialist DIY retailers' estimated shares of all DIY specialists' sales, 2017-21
- **65% of all DIY spending channelled through the sector's leading specialists**
Figure 136: Spain: leading retailers' estimated share of all DIY spending, 2017-21
- **Online**
- **Online activity**
- **Online sales of DIY products**
- **Appendix: Data sources, consumer research methodology and abbreviations**
- **Abbreviations**
- **Consumer research methodology**
- **Data sources**

UK

- **Overview**
- **Key issues covered in this Report**
- **Market context**
- **Products covered in this Report**
- **Executive Summary**
- **Uncertainty lies ahead, but specialists should consolidate**
Figure 137: DIY specialists sector outlook, 2022-27
- **The market**
- **Market size and forecast**
Figure 138: Market forecast for consumer spending on total DIY/hardware specialist sector (including VAT), 2016-26
- **Big-box specialists consolidate their fightback**
Figure 139: Estimated segmentation of DIY specialists (including VAT), 2019-21

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **A second year of double-figure growth in total expenditure**

Figure 140: Category breakdown of consumer spending on DIY-related products, 2016-21

- **Online spending nears £4 billion**

Figure 141: Estimated online DIY market size (ex VAT), 2017-21

- **Companies and brands**

- **Big-box specialists top the table**

Figure 142: DIY products, estimated channels of distribution, 2021

- **The consumer**

- **Three quarters of consumers purchased DIY products**

Figure 143: Where they shopped for DIY products, 2020, 2021 and 2022

- **Stores remain the most popular channel**

Figure 144: Where they shopped for DIY products, in-store and online, 2020-22

- **Lighter-ticket categories spearhead engagement**

Figure 145: Recent home improvements, 2022

- **A wealth of opportunities to re-encourage footfall**

Figure 146: Interest in in-store features, 2022

- **Two years on, there are clear ramifications from the pandemic**

Figure 147: Post-COVID-19 attitudes, 2022

- **Room for improvement for specialists**

Figure 148: Interest in innovation, 2022

- **Issues and Insights**

- **Great uncertainty ahead**

- **Cost-of-living crisis**

- **Mounting supply chain disruption**

- **The Ukraine conflict exacerbates both inflation and supply chain issues**

- **How can DIY specialists help consumers navigate this?**

- **Cost savings**

- **Marketing future cost savings**

- **More flexible payment options**

- **How can DIY specialists consolidate more broadly?**

- **Underlining in-store USPs**

- **Providing for the spotlight on sustainability**

- **Offer an end-to-end proposition**

- **Market Size and Performance**

- **Another year of double-digit growth at DIY specialists**

- **Led by big-box specialists**

- **Continued demand for home improvements**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Newfound confidence in do-it-yourself**
- **An upscaling of home improvement projects**
- **Record activity in the housing market**
- **But demand grows increasingly polarised**
Figure 149: Consumer spending on total DIY/hardware specialist sector (including VAT), 2016–21
Figure 150: Consumer spending on total DIY/hardware specialist sector (including VAT), at current and constant prices, 2016–21
- **Market Forecast**
- **Uncertainty lies ahead, but specialists should consolidate**
Figure 151: DIY specialists sector outlook, 2022–27
- **Growth will flatten with mounting uncertainty**
- **Rising cost of living**
- **Spending will be challenged as other non-discretionary markets are prioritised**
- **Specialists must provide for new trends and growing confidence online**
Figure 152: Market forecast for consumer spending on total DIY/hardware specialist sector (including VAT), 2016–26
- **Market drivers and assumptions**
Figure 153: Key drivers affecting Mintel's market forecast, 2016–26
- **Learnings from the last income squeeze**
Figure 154: DIY specialists' sales (including VAT), 2007–12
- **Forecast methodology**
- **Market Segmentation**
- **Big-box specialists consolidate their fightback**
- **With room for further advances**
Figure 155: Shed/big-box specialists' sector size (including VAT), 2016–21
- **Smaller specialists grow sales at a lower rate**
Figure 156: Other DIY/hardware stores' sector size (including VAT), 2016–21
Figure 157: Estimated segmentation of DIY specialists (including VAT), 2019–21
- **Consumer Spending on DIY Products**
- **A second year of double-digit growth**
Figure 158: Consumer spending on DIY-related products, 2016–21
- **Gardens move up the agenda**
Figure 159: Category breakdown of consumer spending on DIY-related products, 2016–21

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Mintel's consumer spending market size**
- **Online**
- **Total market rises again as it nears the £4 billion mark**
Figure 160: Estimated online DIY market size (ex VAT), 2017-21
- **DIY specialists find their feet online after a bumper 2020**
- **Kingfisher better leverages store networks**
- **B&Q achieves eCommerce growth with the launch of an online marketplace**
- **Screwfix online sales slip following a bumper 2020**
- **Wickes estimates 5 million digital customers**
- **Homebase launches a new website**
- **ManoMano proves demand for specialist pure players**
- **Non-specialist pure players grow again**
Figure 161: Estimated share of DIY sales, by specialist and non-specialist DIY retailers, 2017-21
- **Market Drivers**
- **The conflict in Ukraine will hurt the UK economy**
- **GDP reached pre-pandemic levels in November 2021...**
- **...but the post-COVID-19 bounce back will be followed by a period of slower growth**
- **Employment has held up better than expected**
- **Inflation is the key concern for 2022 for consumers, brands and the economy**
- **Consumers' financial wellbeing has slipped from its recent high point...**
Figure 162: Household financial wellbeing index, 2016-2022
- **...and concerns over inflation are coming to the fore**
Figure 163: Consumer concerns about household finances, 2021-22
- **The home continues to gain from redirected expenditure**
- **But this raises concerns moving forward**
Figure 164: Spending, by sector, 2022
- **Record house sales are pivotal to recent growth**
Figure 165: Monthly UK residential property transactions, 2019-2022
- **Nearly two thirds are homeowners**
Figure 166: England housing tenure, 2017-21
- **Market Share**
- **Big-box specialists top the table**
- **Online pure players continue their upward trajectory**
- **Generalists gain from continued disruption**
Figure 167: Top 10 leading retailers' estimated share of all DIY spending, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 168: DIY products, estimated channels of distribution, 2021

- **Leading Specialists**
- **Kingfisher reaps the rewards of its strategy shift**
- **B&Q**
- **Screwfix**
- **Kingfisher remains confident of growth despite uncertainty**
- **Early signs are promising following Wickes' demerger**
- **Homebase marks the conclusion of its turnaround strategy**
- **ManoMano doubles UK sales**

Figure 169: Leading DIY specialists' sales, 2017-21

- **Kingfisher matches turnover with double-figure growth in profits**
- **Homebase returns to profits and ends its CVA early**

Figure 170: Leading specialists' operating profit, 2017-21

Figure 171: Leading specialists' operating margin, 2017-21

- **Kingfisher: the success of multichannel propositions**
- **B&Q experiments with new store formats**
- **Screwfix nears target of 1,000 stores in the UK and Ireland**
- **Toolstation aims to reach 650 stores**
- **Wickes revamps its existing estate**

Figure 172: Leading DIY specialists' outlets, 2017-21

Figure 173: Leading DIY specialists' estimated sales per outlet, 2017-21

- **Leading Non-Specialists**
- **Disruption continues to fragment spending**
- **Amazon bolsters sales, albeit more narrowly**
- **Supermarkets gain from multi-mission shopping**
- **Discounters will come into the spotlight in 2022**

Figure 174: Leading non-specialists' estimated DIY sales (excluding VAT), 2017-21

- **Launch Activity and Innovation**
- **A continued emphasis on technology to bridge online and offline**
- **The rise in mobile purchasing maintains the spotlight on apps**
- **Brico Dépôt Iberia launches video-chat online consultancy**
- **OBI turns to social media to engage younger consumers**
- **Specialists continue to experiment with new store formats**
- **Homebase partners with Tesco for store-in-store launch**

Figure 175: Homebase store-in-store in Tesco, 2022

- **Branded concessions offer multi-mission experiences in-store**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- 'IKEA Decoration' launched in Paris
- French specialist Bricoman trials a two-shops-in-one concept in Paris
- B&Q launches an online marketplace
- Leroy Merlin launches a new online marketplace in Italy
- ManoManoPro online marketplace for trade professionals
- Disruption drives innovation around sustainability
- Specialists make moves in-store
- Opportunities for greener product ranges
- The rising cost of living will boost the importance of after-sales offerings
- Leroy Merlin partners with Jobby to provide support for small household chores
- .. and offers planning and assistance packages with 'Studio' concept
- Screwfix launches a rapid delivery service: Screwfix Sprint
Figure 176: Screwfix Sprint, 2022
- Any cost savings will be in high demand
- Advertising and Marketing Activity
- Total sector advertising expenditure recovers in 2021, but still below pre-pandemic levels
Figure 177: Total above-the-line, online display and direct mail advertising expenditure by UK DIY retailers, 2018-21
- B&Q, Wickes and Homebase account for nearly 98% of total sector advertising spend
Figure 178: Leading UK DIY retailers' recorded above-the-line, online display and direct mail total advertising expenditure, 2018-21
- Majority of advertising spend channelled through TV
Figure 179: Total above-the-line, online display and direct mail advertising expenditure by UK DIY retailers, by media type, 2021
- Key campaigns
- B&Q's 'Change. Made Easier.' campaign
- Wickes debuts first TV bathroom advert in a decade
- 'Escape to the Chateau' duo front Homebase 2021 Christmas campaign
- Toolstation advert champions the skills of key tradespeople
- Nielsen Ad Intel coverage
- Brand Research
- What you need to know
- Brand map

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 180: Attitudes towards and usage of selected brands, 2022

- **Key brand metrics**

Figure 181: Key metrics for selected brands, 2022

- **Brand attitudes: Screwfix provides a great online service and Wilko offers good value**

Figure 182: Attitudes, by brand, 2022

- **Brand personality: B&Q accessible and ethically minded**

Figure 183: Brand personality – macro image, 2022

- **B&Q aspirational, Homebase stylish, Screwfix cutting edge, Wilko basic but welcoming**

Figure 184: Brand personality – micro image, 2022

- **Brand analysis**
- **Screwfix offers an excellent experience and is highly recommended**
- **B&Q is trustworthy, reliable, accessible and ethically minded**
- **Wilko is good value for money, welcoming and accessible, but basic**
- **Wickes is affordable, but somewhat boring and less ethically minded than its competitors**
- **Homebase is stylish, but overrated and expensive**
- **Where They Shop**
- **Three quarters of consumers purchased DIY products**
- **DIY specialists again lead the way...**
- **...with two of the top three most popular destinations**
- **But non-specialists continue to offer an attractive alternative**

Figure 185: Where they shopped for DIY products, 2020, 2021 and 2022

- **In-store vs Online**
- **Stores remain the most popular channel**
- **But confidence has grown online**

Figure 186: Where they shopped for DIY products, in-store and online, 2020-22

- **Multichannel specialists regain stability in-store and online**
- **How physical DIY specialists improved their online offering**

Figure 187: Where they shopped for DIY products, in-store and online, 2022

- **Store buyers are more likely to shop around**

Figure 188: Repertoire analysis of where they shopped for DIY products, in-store and online, 2022

- **Recent Home Improvements**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **Lighter categories spearhead engagement**
- **But many undertook larger projects in the past year**
- **Disruption shined the spotlight on communal and outdoor areas**

Figure 189: Recent home improvements, 2022

- **Newfound confidence boosts uptake**
- **Six in 10 undertook more than two projects**

Figure 190: Repertoire analysis of recent home improvements, 2022

- **In-store Interest**
- **Ramping up traditional USPs**
- **Mounting interest in sustainability offers a wealth of opportunities**
- **Demand for provenance will grow with supply chain uncertainty**

Figure 191: Interest in in-store features, 2022

- **Multi-mission experiences provide more reasons to come in-store**
- **Leveraging online to streamline in-store shopping**
- **Older, affluent consumers look to specialist staff**

Figure 192: Target groups based on interest in in-store features – CHAID – tree output, 2022

Figure 193: Target groups based on interest in in-store features – CHAID – table output, March 2022

- **The Legacy of the Pandemic**
- **The spotlight on the home...**
- **... and newfound confidence will continue to offer opportunities**
- **While feeding into newer, sustainable behaviours**

Figure 194: Post-COVID-19 attitudes, 2022

- **Pure players present a growing threat**
- **Interest in Innovation**
- **There remains strong demand for do-it-for-me**
- **But the newfound confidence in DIY has created opportunities**

Figure 195: Interest in innovation, 2022

- **The rising cost of living will further polarise demand**

Figure 196: Interest in innovation, by financial situation, 2022

- **Consumers expect the utmost convenience**
- **New movers more likely to seek additional ranges and services**

Figure 197: Interest in innovation, by duration in current home, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

DIY Retailing - Europe - 2022

Report Price: £3195 | \$4400 | €3850

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- **Appendix – Data Sources, Abbreviations and Supporting Information**
- **Abbreviations**
- **Consumer research methodology**
- **Appendix – Forecast Methodology**
- **Market forecast and prediction intervals**
Figure 198: Consumer spending on total DIY/hardware specialist sector, 2021–26
- **Market drivers and assumptions**
- **Forecast methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.