THE
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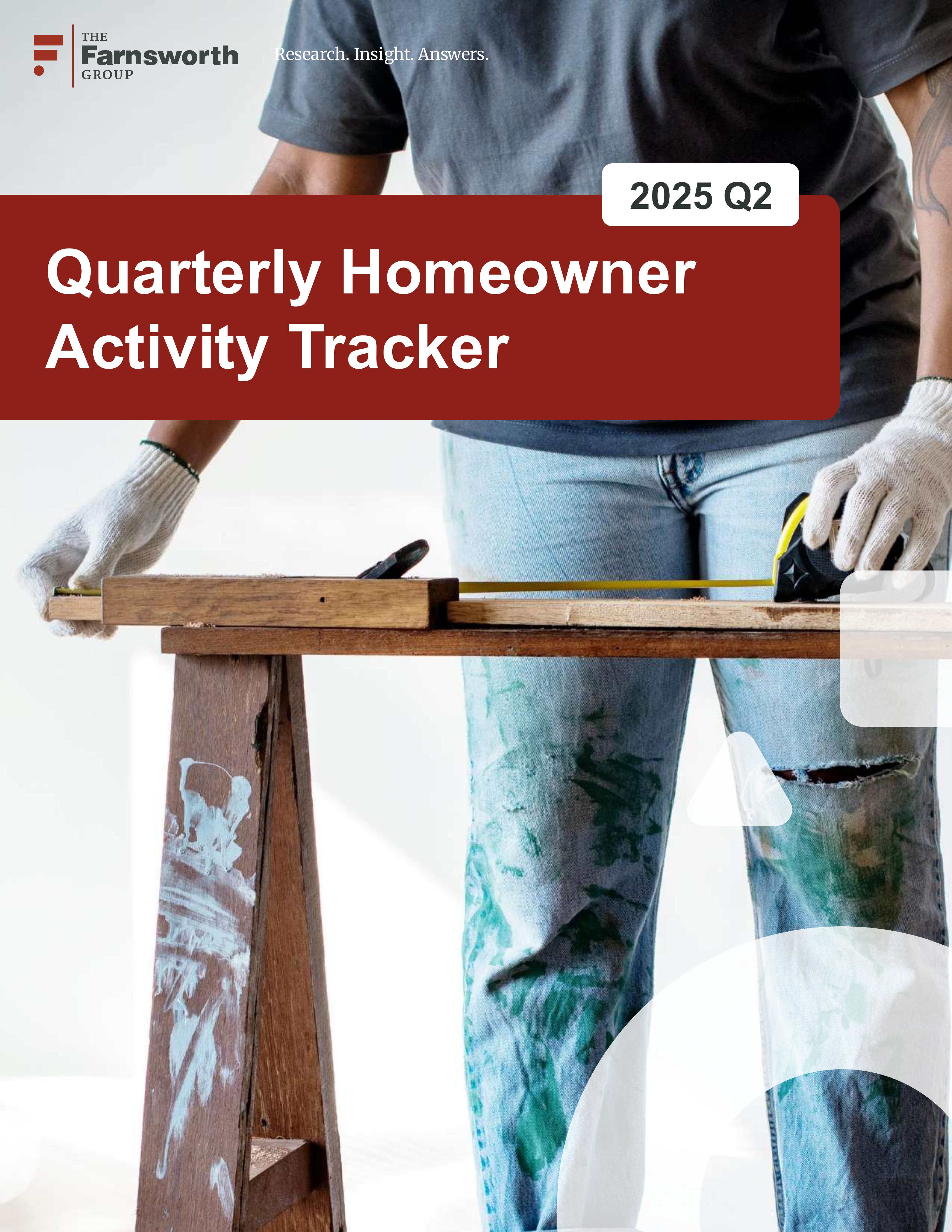
GROUP

Research. Insight. Answers.

2025 Q2

Quarterly Homeowner Activity Tracker



Unpacking Homeowner Trends:

Insights from The Farnsworth Group & Home Improvement Research Institute

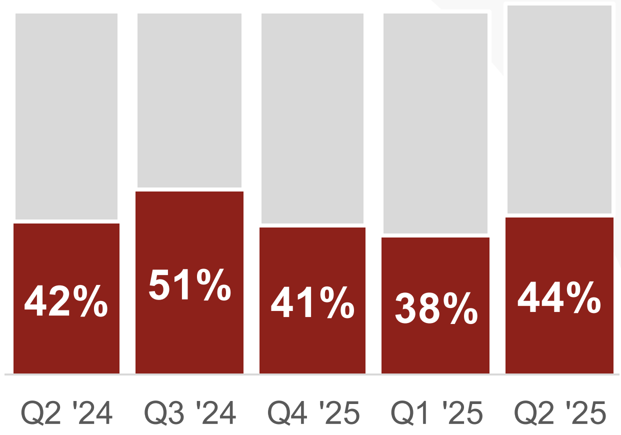
THE Farnsworth GROUP + HIRI HOME IMPROVEMENT RESEARCH INSTITUTE

Understanding the dynamic landscape of Homeowners and DIYers is crucial for businesses involved with home improvement. In partnership with the Home Improvement Research Institute (HIRI), The Farnsworth Group conducts this quarterly study to gain insight into homeowners' attitudes and motivations driving home improvement initiatives. This research sheds light on recent projects completed within the last 90 days, details on project activity, and planned activities for the next 90 days.

The Farnsworth Group specializes in custom research tailored to the building products and home improvement markets, helping businesses make data-driven decisions. The Home Improvement Research Institute provides its members with exclusive access to free research reports, like this one, to offer a wide range of broader home improvement information.

Book a consultation with The Farnsworth Group to leverage industry research expertise for your business or become a HIRI member to access a range of research reports on the home improvement market.

This quarterly report is intended to provide overarching home improvement project themes. For additional details and insight, login to your HIRI account or join HIRI at HIRI.org.



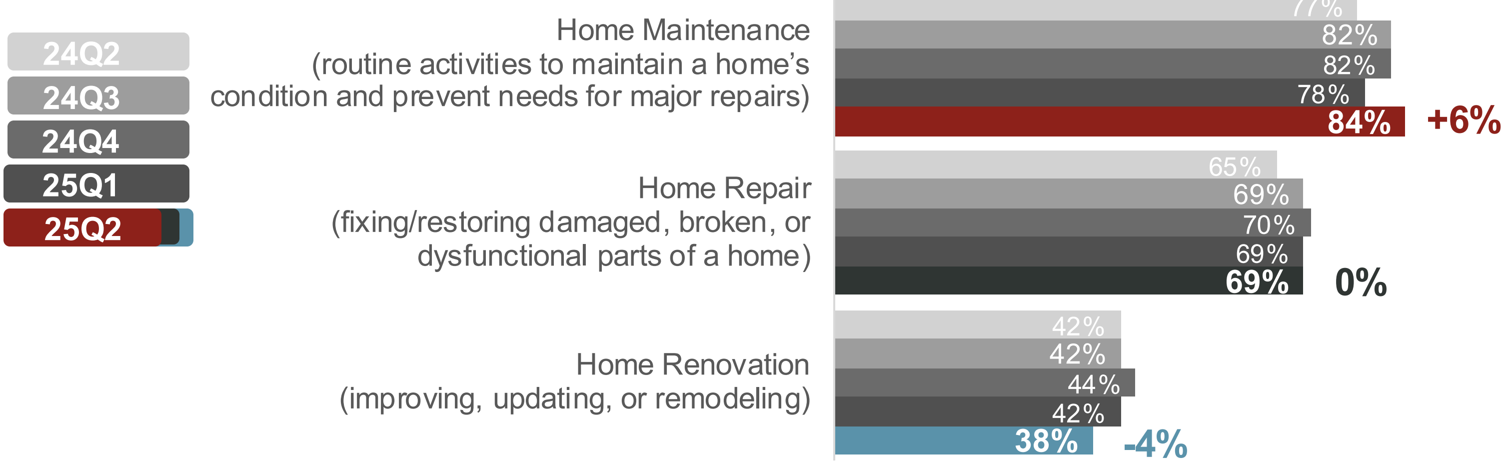
HI Activity in Last 90 Days

No HI Project | HI Project

Home improvement activity held steady in Q2, with modest upticks in repair and maintenance reinforcing a pragmatic project mix.

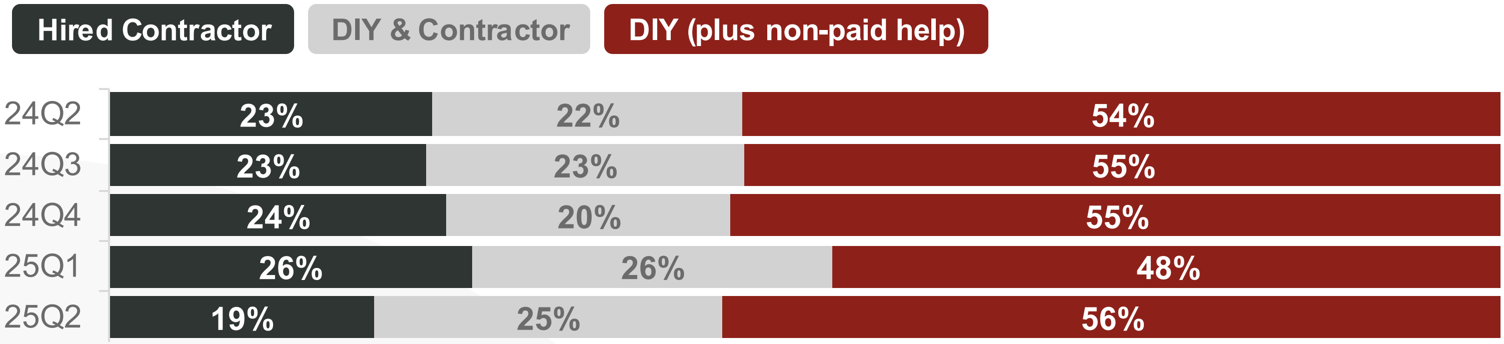
HI Project Completed in Last 90 Days

(Question was added in 24Q2)

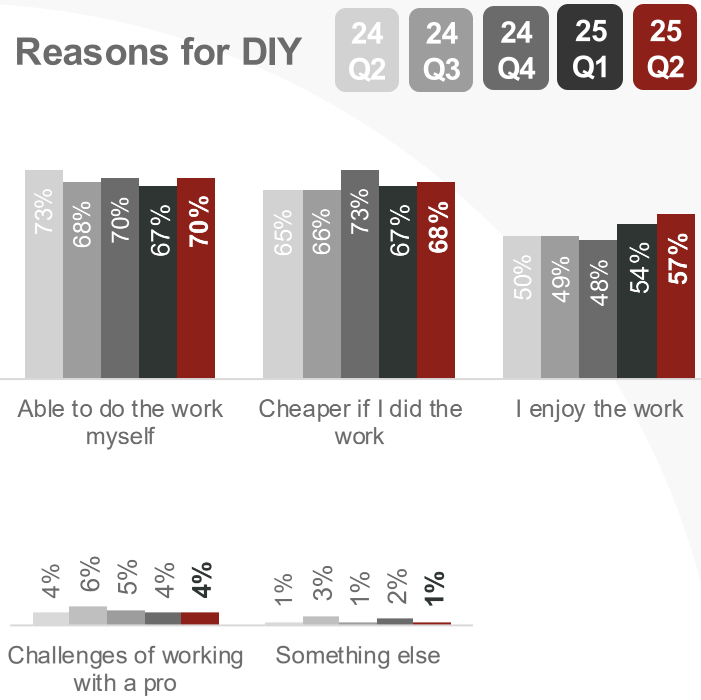


DIY activity normalized in Q2, returning to typical levels after a Q1 dip. Motivations remain steady, led by capability, savings, and enjoyment.

How HI Activity Was Completed in Last 90 Days



Reasons for DIY



Challenges Hiring a Professional

24Q2 | 24Q3 | 24Q4 | 25Q1 | 25Q2

▲ **Trustworthiness***
— | — | — | 11% | 29%

▲ **Quality**
9% | 15% | 16% | 15% | 22%

▲ **Timelines Too Long**
13% | 15% | 18% | 6% | 15%

▼ **Communication**
8% | 14% | 12% | 13% | 9%

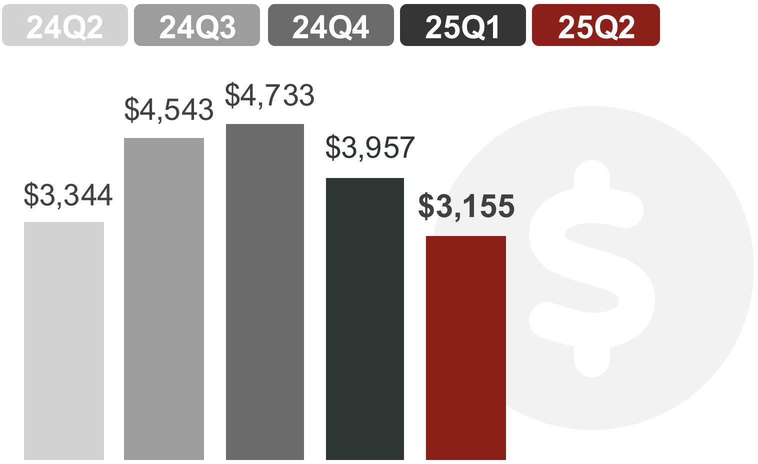
Too Expensive
20% | 15% | 19% | 25% | 22%

▲ **Lack of Response**
9% | 12% | 11% | 6% | 22%

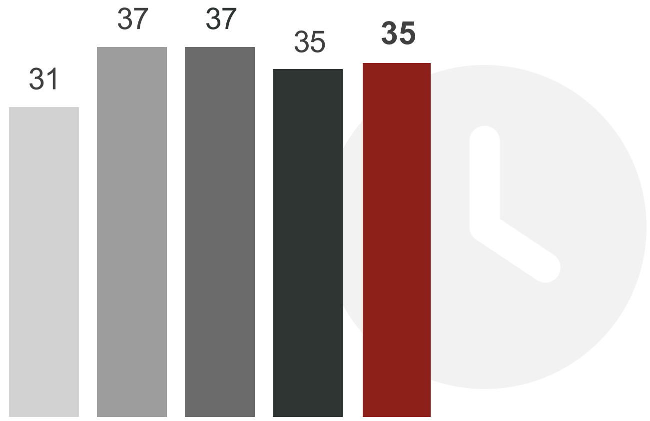
Too Busy/Unavailable
13% | 17% | 13% | 15% | 13%

*Question added in Q1

Project spending in 25Q2 neared 24Q2 levels, DIY hours stabilized, and funding sources held steady with real estate loans still uncommon.

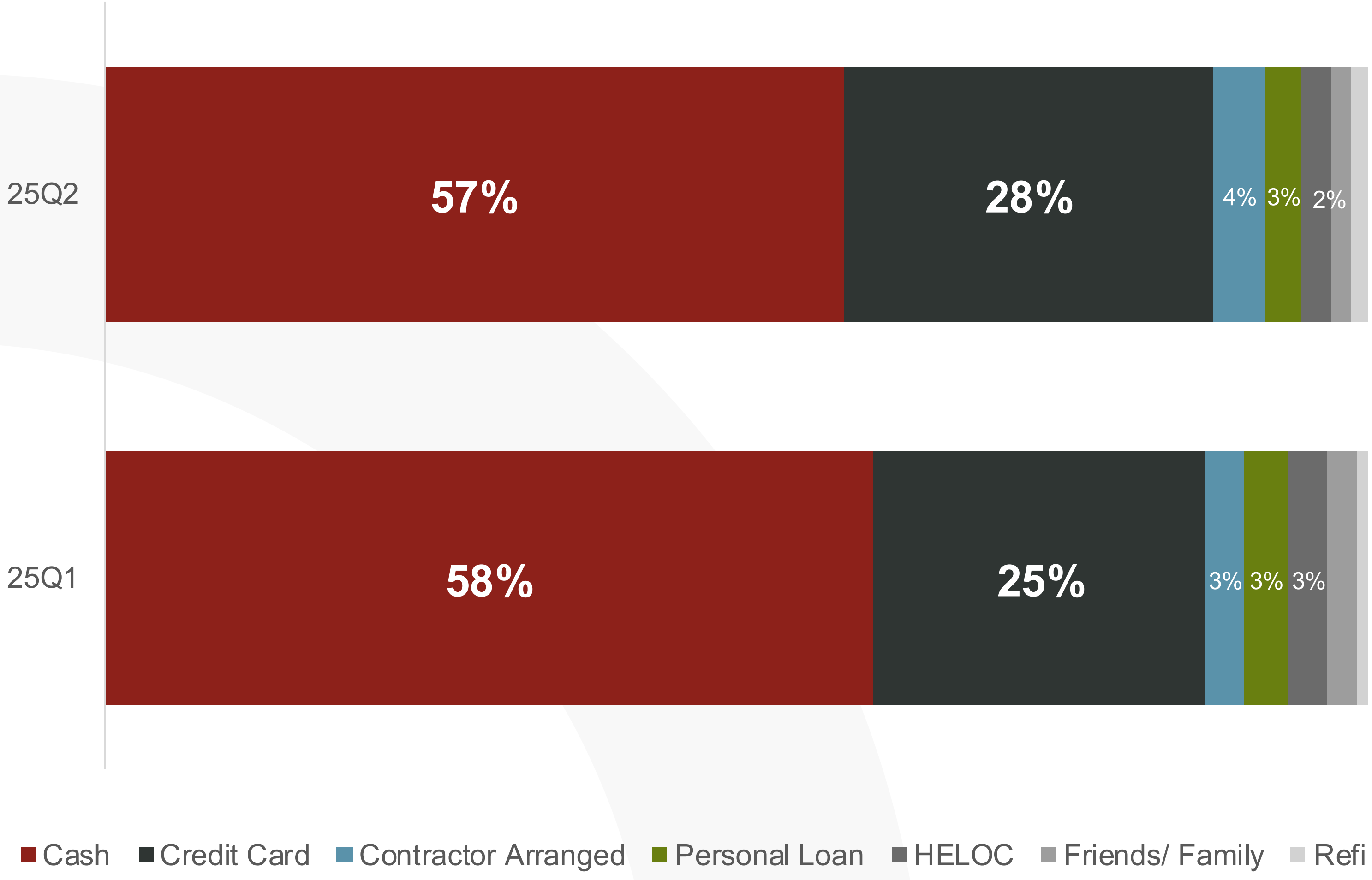


Average Dollar Amount Spent on HI in Last 90 Days Among Those Completing Projects



Average DIY Hours (self or other) Spent on HI in Last 90 Days Among Those Completing Projects

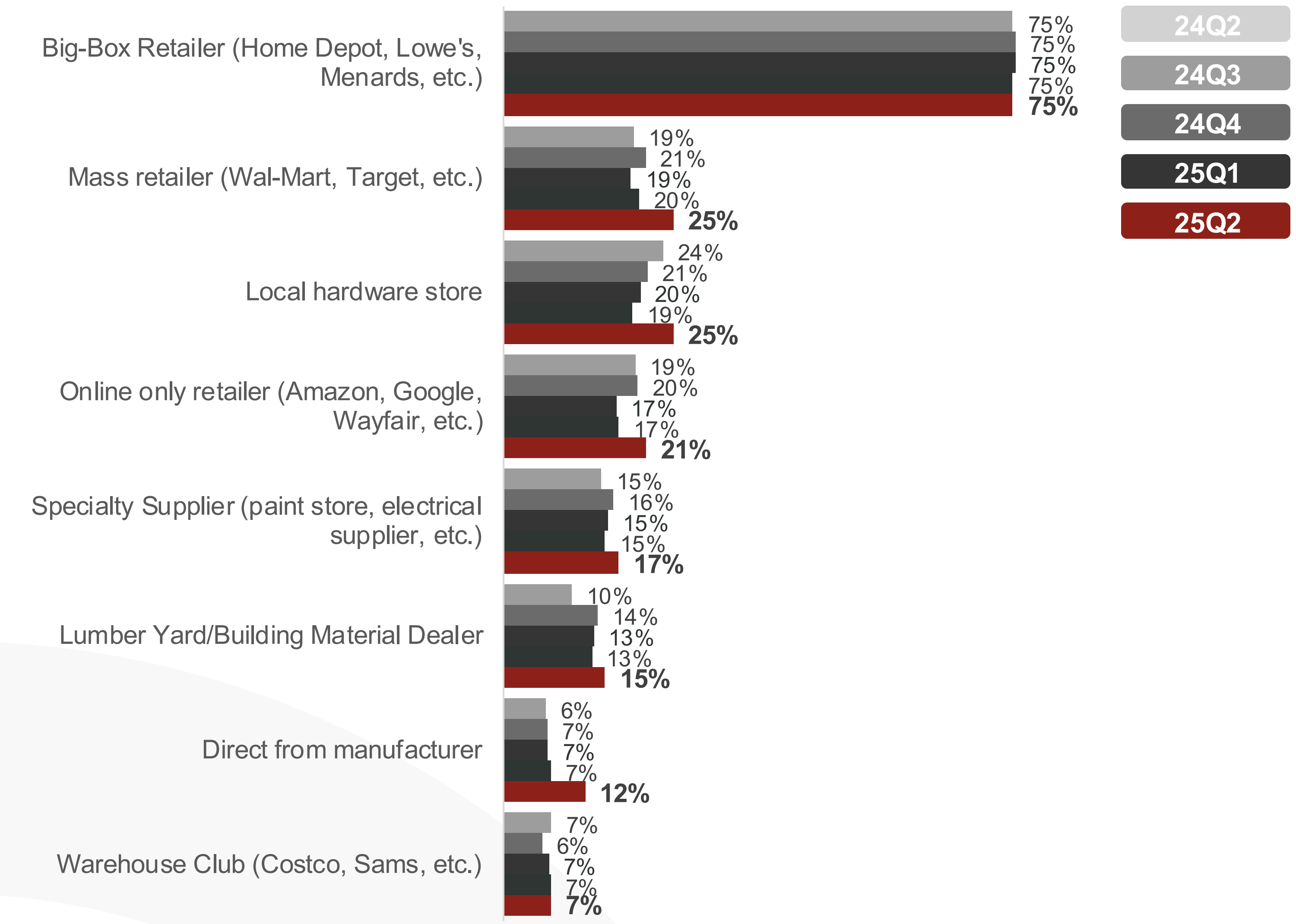
Payment for HI Activity in Last 90 Days



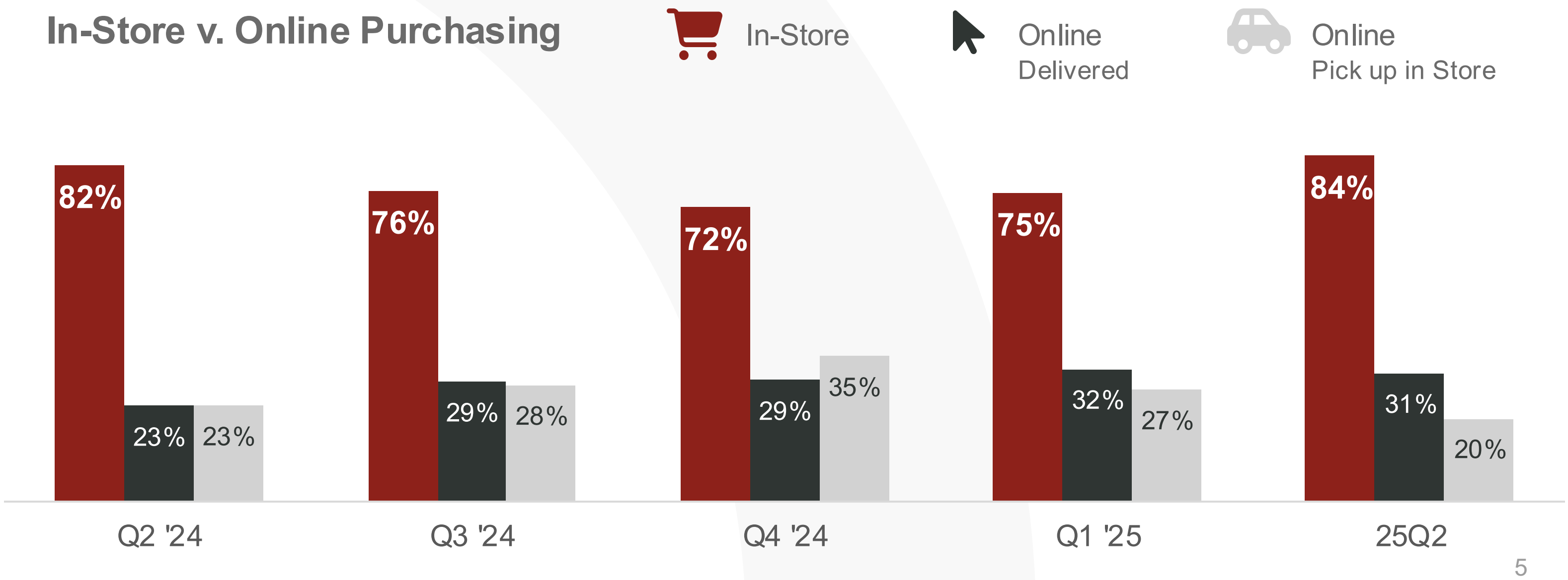
*Changed from multi-select to constant sum in Q1

Big-box retailers remained overwhelmingly dominant in Q2, while growth in online-only and local hardware stores suggests flexible fulfillment.

Channels Used for HI Product Purchases

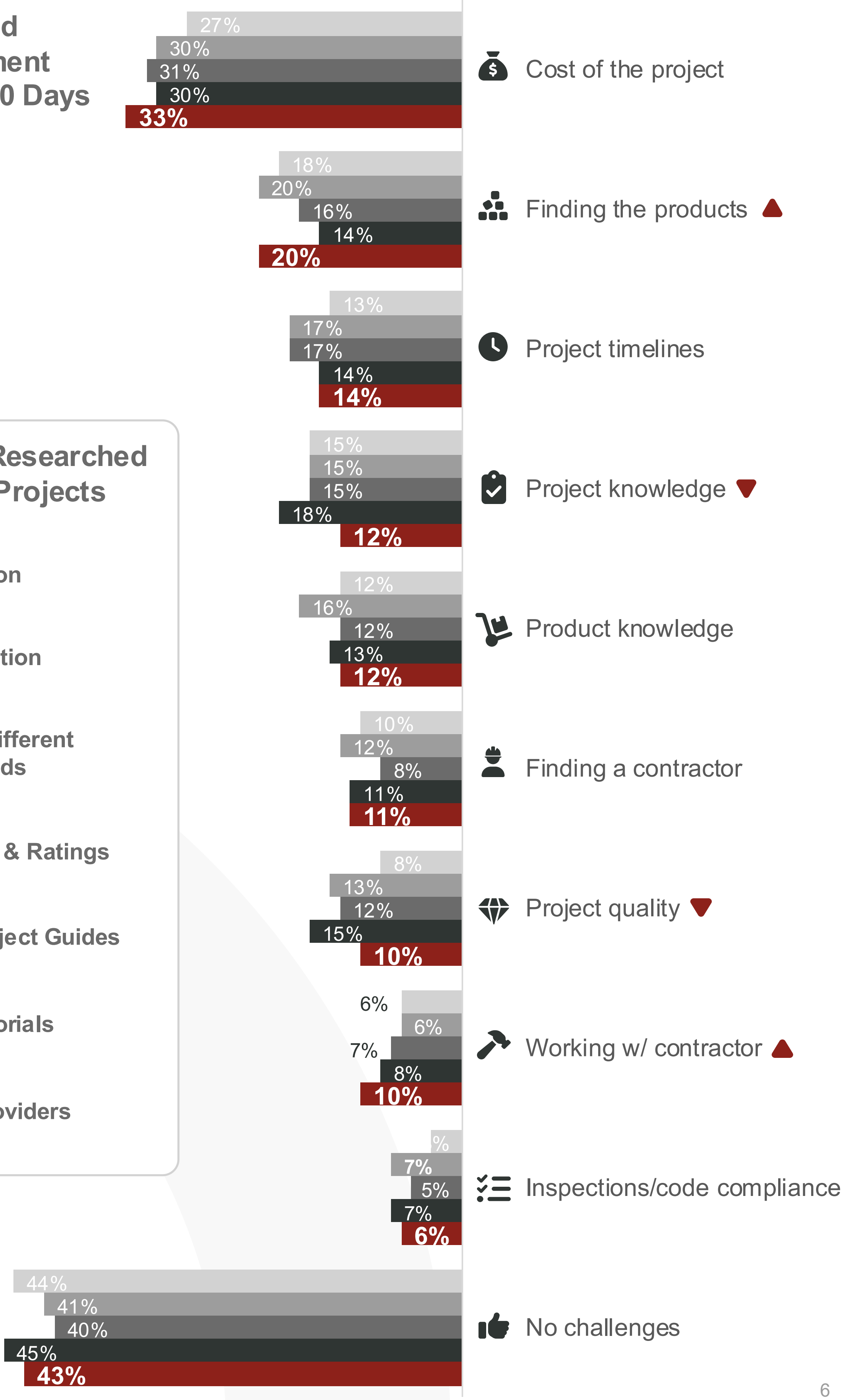


In-Store v. Online Purchasing



Four in ten project doers reported no major project challenges, though cost, finding products, and timelines were the most cited difficulties.

Challenges Encountered During Home Improvement Projects Done in Last 90 Days



Types of Information Researched in Local HI Stores for Projects

25% Pricing Information

25% Ideas and Inspiration

24% Comparison of Different Products or Brands

16% Product Reviews & Ratings

13% Step-by-Step Project Guides

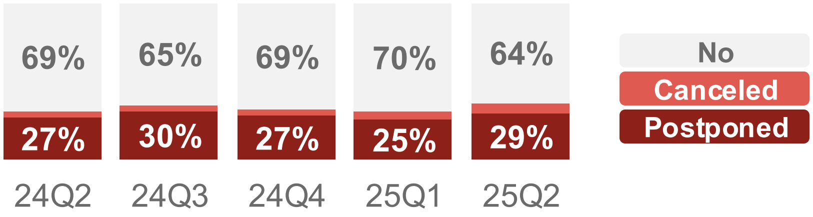
13% DIY Tips and Tutorials

12% Local Service Providers and Contractors

Among project doers, cancellations and/or postponements reached a five-quarter high, though reasons remained relatively stable.

Postponed or Canceled Project

Homeowners Postponing or Canceling HI Project in Last 90 Days



Reasons for Postponement/Cancelation of HI Activity

24Q2 | 24Q3 | 24Q4 | 25Q1 | 25Q2

Budget
67% | 72% | 65% | 67% | 70%

Labor Costs ▼
40% | 36% | 39% | 45% | 34%

Schedule/Timing
17% | 19% | 23% | 17% | 20%

Priorities Changed
12% | 11% | 14% | 15% | 14%

Availability of Labor
10% | 8% | 11% | 16% | 13%

Health Concerns
8% | 14% | 13% | 11% | 8%

Material Availability ▼
9% | 10% | 8% | 16% | 6%

Underestimated Time ▼
8% | 6% | 7% | 12% | 6%

Labor Quality
7% | 9% | 7% | 3% | 6%

Pro's Decision
2% | 3% | 2% | 1% | 4%

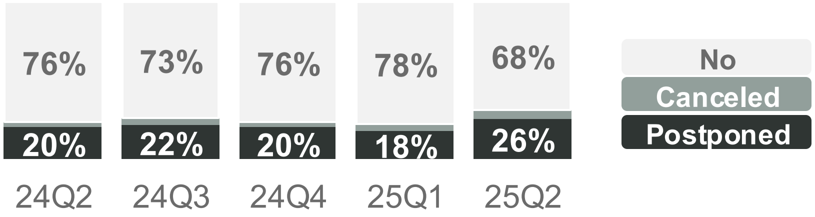
Code Compliance ▼
2% | 3% | 4% | 10% | 1%

Challenges with Pro
6% | 2% | 6% | 2% | 1%

Non-project doers hit a five-quarter high for delays/cancellations, driven by financial and scheduling strain as labor and priority reasons declined.

Did Not Complete Project

Homeowners Postponing or Canceling HI Project in Last 90 Days
Among Those with Incomplete Projects



Reasons for Postponement/Cancelation of HI Activity

24Q2 | 24Q3 | 24Q4 | 25Q1 | 25Q2

Among Those with Incomplete Projects

Budget ▼
63% | 67% | 69% | 82% | 70%

Labor Costs ▼
48% | 44% | 47% | 51% | 21%

Schedule/Timing ▲
18% | 10% | 10% | 3% | 18%

Priorities Changed ▼
10% | 8% | 13% | 33% | 12%

Health Concerns
5% | 11% | 15% | 7% | 12%

Availability of Labor
11% | 15% | 7% | 11% | 6%

Labor Quality
15% | 14% | 6% | 0% | 6%

Underestimated Time
10% | 5% | 5% | 9% | 5%

Material Availability ▼
9% | 19% | 9% | 20% | 4%

Pro's Decision
0% | 0% | 0% | 6% | 3%

Challenges with Pro
3% | 3% | 4% | 2% | 1%

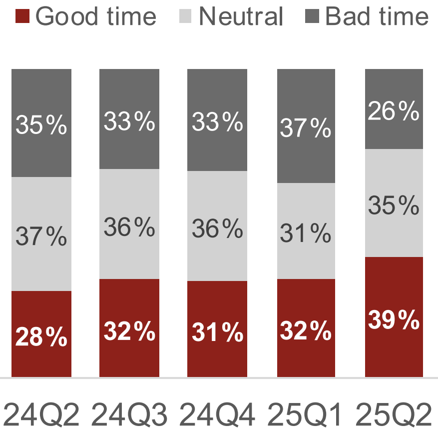
Code Compliance
2% | 6% | 7% | 9% | 0%

Current HI Activity Sentiment

*Question added in Q1

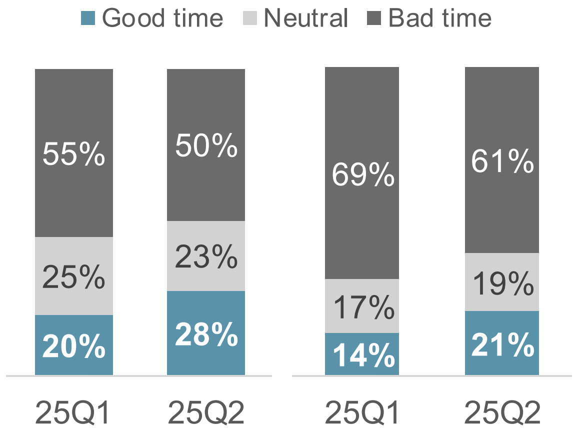
Owners remained most bullish on smaller projects in Q2, with modest sentiment gains for larger efforts where optimism remains more muted.

Start a HI project <$5,000

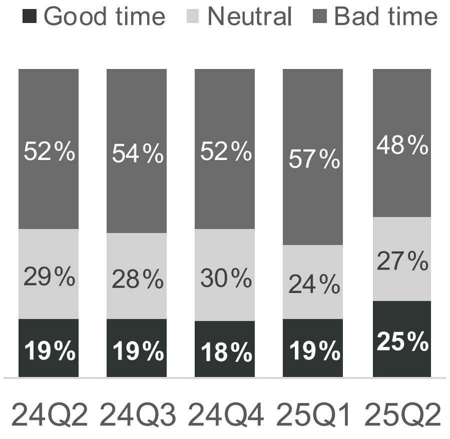


Start a $5K-$25K Project*

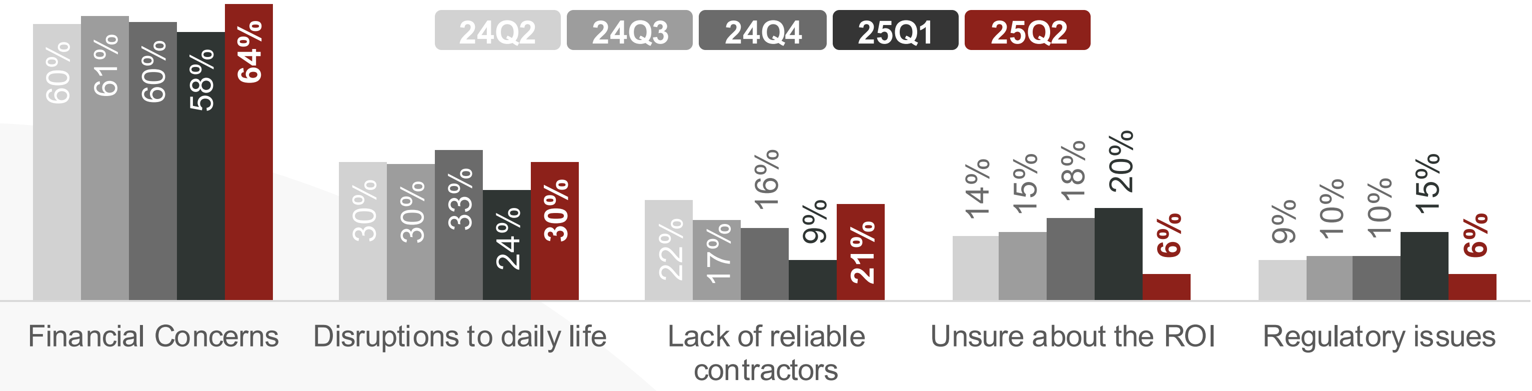
Start a $25K+ Project*



Hire a Professional



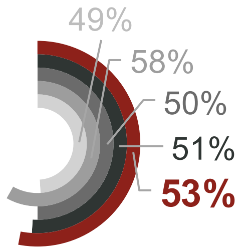
Barriers to HI Project in Next Year



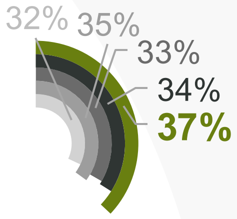
Project intent hit a five-quarter high in Q2, with eight in ten owners planning activity, despite product purchase intent softening.

HI Project Planned in Next 90 Days

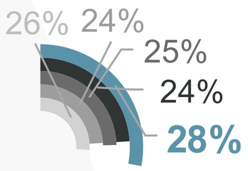
24Q2 24Q3 24Q4 25Q1 25Q2



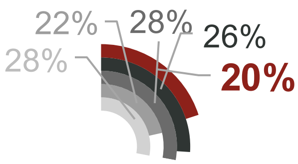
Home Maintenance
(routine activities to maintain a home's condition and prevent needs for major repairs)



Home Repair
(fixing/restoring damaged, broken, or dysfunctional parts of a home)



Home Renovation
(improving, updating, or remodeling)



None of the Above

Objectives & Methodology

Research Objectives

1. Gain Insight into Homeowners' Attitudes and Motivations Driving Home Improvement Initiatives.
2. Investigate Recent Home Improvement Activities Conducted Within the Last 90 Days.
3. Analyze Evolving Channel Behaviors Over Time in Home Improvement Purchases.
4. Delve into Product Research Patterns and Influential Factors Shaping Project and Product Purchasing Decisions.
5. Understand Why Homeowners Did Not Undertake Home Improvement Activities in the Last 90 Days.
6. Anticipate Future Home Improvement Activity by Understanding Homeowners' Project Intentions.

Project Methodology

- Online survey administered June-July 2025
- The sample for the study included 1,106 respondents
- Sample is weighted to ensure national homeowner representation*
- ▲- indicates statistically significant change from the prior quarter.

Improved Market Strategy With Customized Research

Customer Behaviors & Attitudes

- Learn where customers shop, when and why to identify marketing and sales opportunities through the path to purchase
- Profile customers for effective targeting
- Quantify product usage to define market opportunity
- Prioritize selection criteria to know what you must deliver

Brand Health & Performance

- Monitor brand performance to measure marketing success
- Capture brand perceptions to define market position
- Understand brand equity to improve category growth success
- Define brand usage to determine share opportunity

Product Development & Pricing

- Explore product uses and needs to establish viable concepts
- Validate concepts to increase adoption at launch
- Define price & feature combinations to win at point of sale
- Determine preferred messaging and packaging to attract buyers

Market Sizing & Structure

- Define total product sales volume to know market potential
- Define brand share to determine acquisition opportunity
- Define product distribution structure to inform channel strategy
- Define share by customer type to develop marketing and sales strategy

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THE
Farnsworth
GROUP

✉ results@thefarnsworthgroup.com
in the-farnsworth-group

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✉ contact@hiri.org
in home-improvement-research-institute