



European Home Improvement Monitor Q2 2024

Purchase Channels

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Home improvement per category



About European Home Improvement Monitor

THE GOAL

To check and track the behaviour and trends in the European home improvement market. This is done 4 times per year, by means of 6.600 online interviews (per quarter) with consumers, divided over 11 major European markets.

THE RESEARCH TOPICS

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

Quarterly theme part topic in 2024:

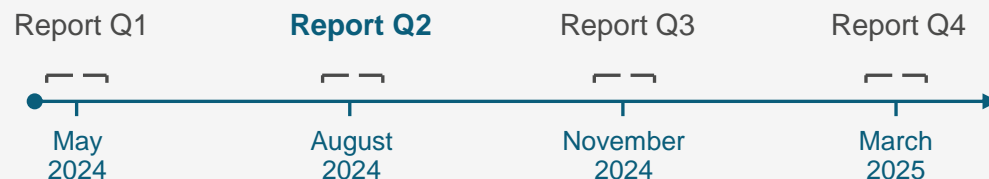
Q1: Needs & willingness to invest in sustainability

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

THE TIMELINE



COUNTRY SCOPE

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

Background characteristics of the interviewed respondents can be found in the [appendix](#)

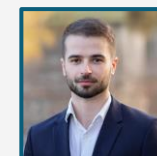
Insights are provided for **11** European countries



PROJECT TEAM



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WHY EUROPEAN HOME IMPROVEMENT MONITOR?



UNDERSTANDING THE CONSUMER

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

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



PARTNERSHIP

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

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

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



CROSS-COUNTRY INSIGHTS

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

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

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

Methodology

We use a nationally representative sample for our study. This includes all types of consumers aged 18+; Male and female, house renters and owners, consumers with & without DIY experience, those who conduct DIY jobs themselves and people that outsource it to professionals.

Sample size

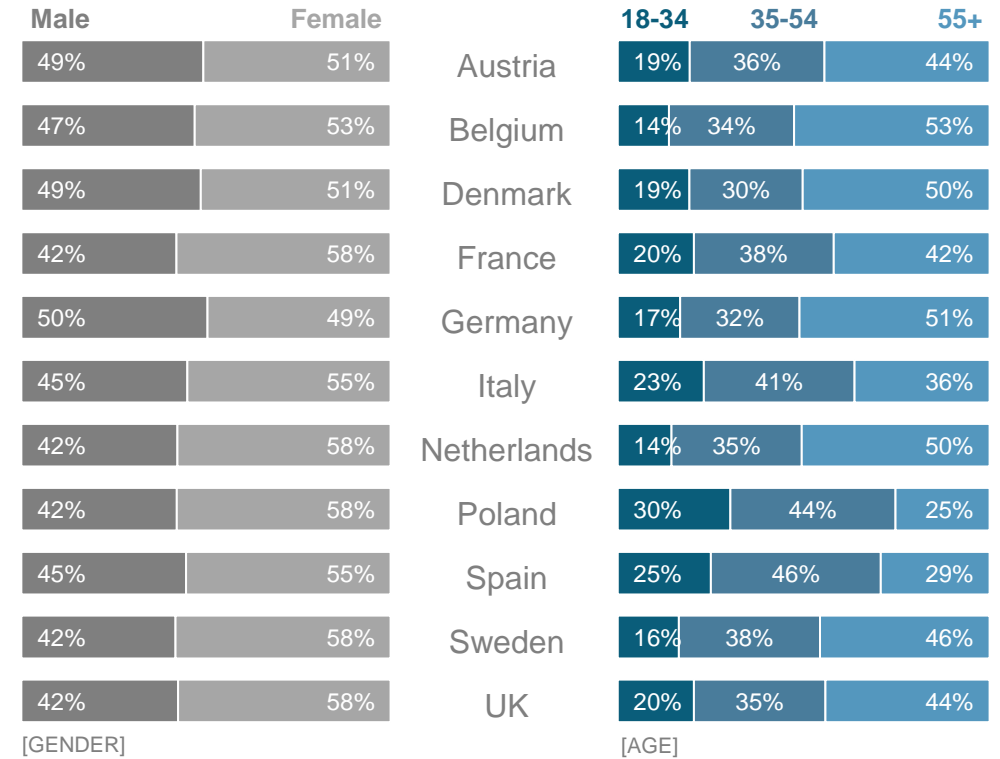
1st chapter – EU results are based on 26,400 interviews per year

2nd chapter – EU level based on approx. 6,600 interviews

3rd chapter – Incidence rate (Share of households that did a home improvement job) is based on 600 per country per quarter; Theme questions on approx. 600 interviews per country

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

Sample background



Weighting factor

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

Methodology

INCLUDED CATEGORIES OF THE RESEARCH

Adhesives & Sealants	Bathroom products	Decorative products	HVAC	Paint Supplies	Power Tools	Roof daylight	Security & Safety	Constructive	Electrical
Sealants	Bath	Flooring products	Airconditioning	Fillers	Drill	Dormer windows	Locks	Insulation	Switches and sockets
Tile adhesive	Bathroom furniture	Paint	Boiler (Central heating system)	Safety products (e.g., masks or respirators)	Electrical saw	Roof windows	Security camera	Gypsum boards	
	Shower enclosures	Wallpaper	Ventilation	Sandpaper	Electrical screwdriver		Smoke alarm or fire alarm		
	Shower set/shower head	Window decoration		Tapes	Hammer drill		Home automation systems		
	Shower tray				Sander				
	Taps & mixers								
	Toilet								
	Washbasin								
	Whirlpool								
Shower drain (for tiled shower floor)									

Theme questions

In this chapter, we take a deeper dive into the purchase channels, as well as the online performance of DIY stores. The respondents were asked the following:



- What website comes to mind first when you think about online purchasing of <home improvement products> Paint / Bathroom products (tap, showerhead, wash basin etc.) / Power tools / Flowers & plants? Where would you prefer to buy them?
- Have you purchased any products online via Amazon in the past 12 months?
- Have you purchased any home improvement products via Amazon/<national nr.1 etailer> in the past 12 months?
- Have you purchased anything online at the following online stores during the past 6 months? Did you pick up the purchased product(s) in the store or was it delivered to your home?
- What rating do you give the online shopping experience at <DIY store/Amazon/national nr.1 etailer>?
- How important are customer reviews/ratings in your decision to purchase home improvement products online?
- Do you purchase most of your home improvement products at a single store or multiple stores?
- For what reasons would you buy home improvement products at the following channels?
- Which of these applications do you have on your phone? Which online platforms do you expect to use for inspiration when you want to renovate your living room, bathroom or kitchen?
- Looking forward to the months July – September/the next 12 months, do you expect the number of home improvement jobs in or outside your home to be more, the same or less than in the same period last year?
- To what degree do you expect to spend more or less money on home improvement in July – September/the next 12 months compared to the same period last year?
- Do you feel this month is a good or bad time to start a project over/under €5.000 for home improvement, repair or maintenance? 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? Why?
- Are you planning to start a home improvement, repair or maintenance project in the next 30 days?

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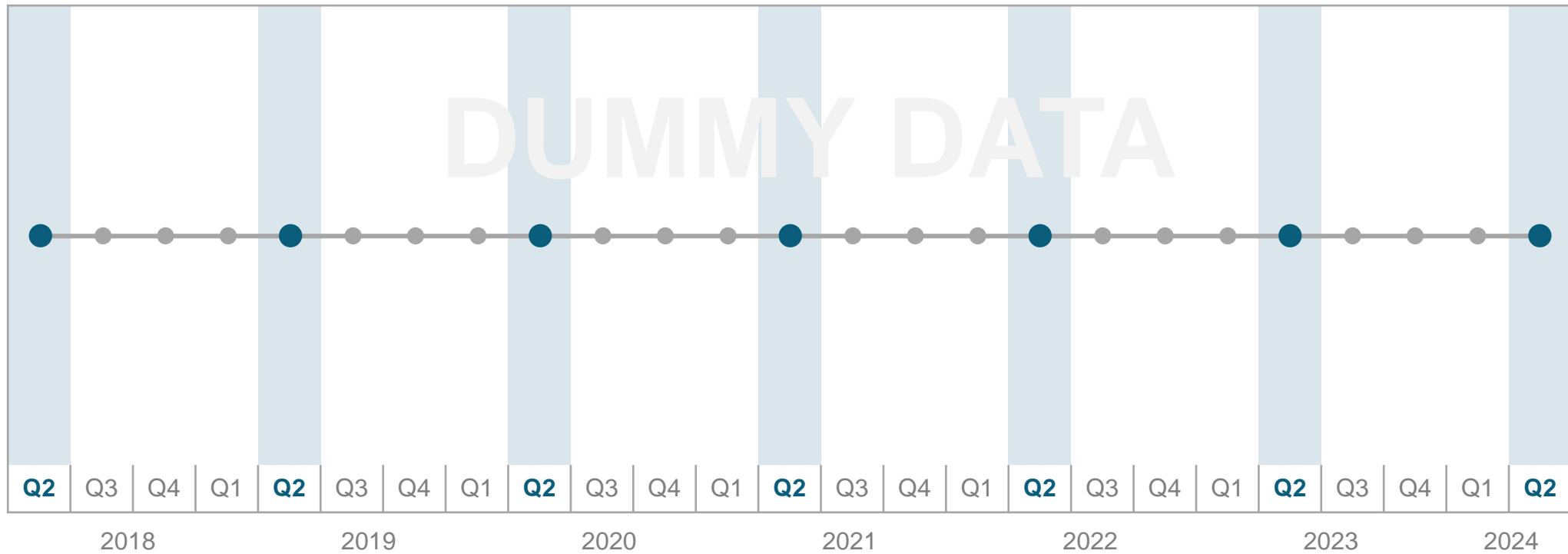
Home improvement per category



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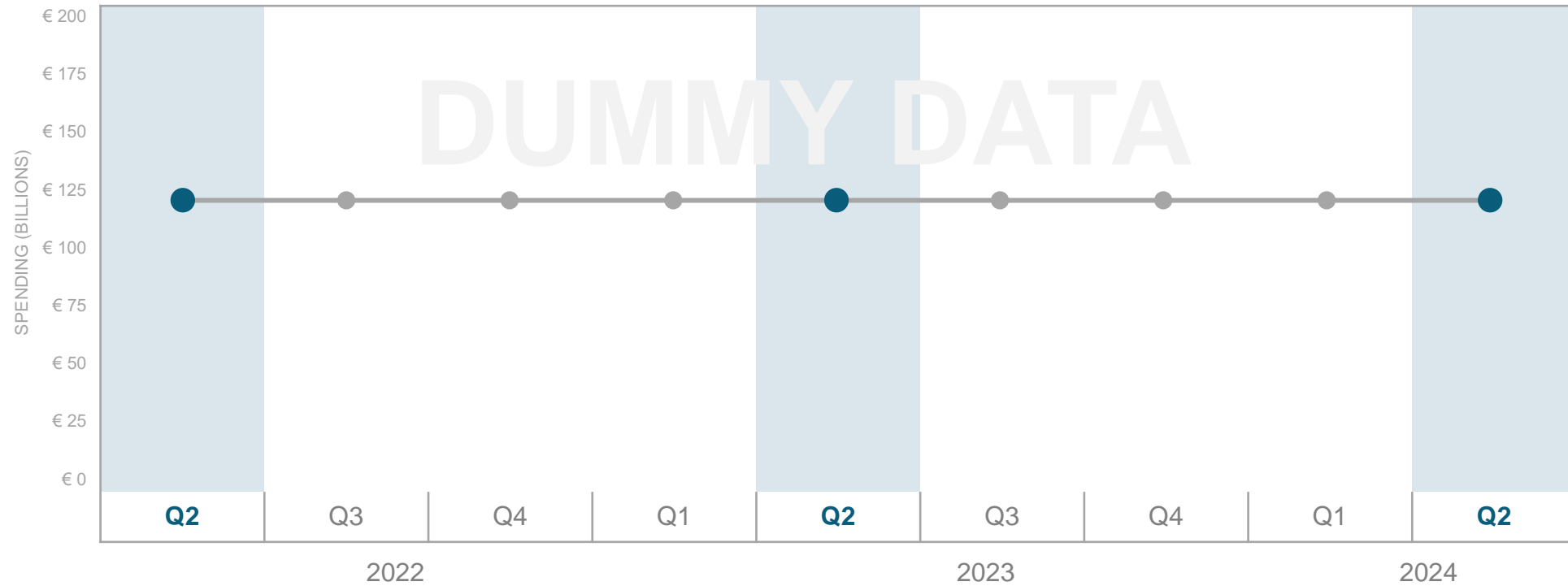
Share of households that have done a home improvement job

2024 Q2



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European spending on labour and material
2024 Q2



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

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Plans in the next 30 days

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

DUMMY DATA

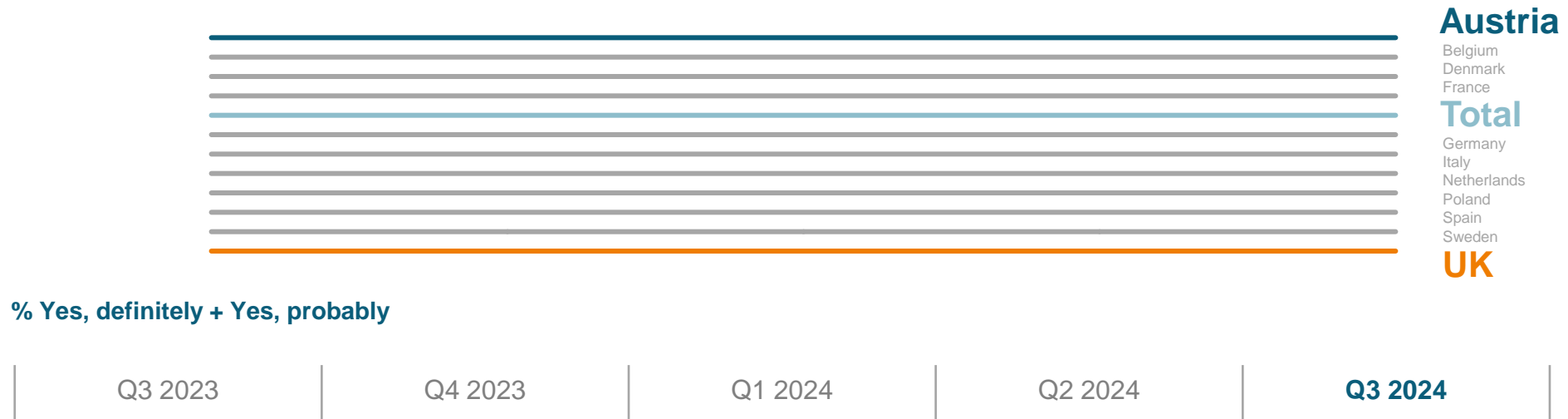


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Plans in the next 30 days – by country

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

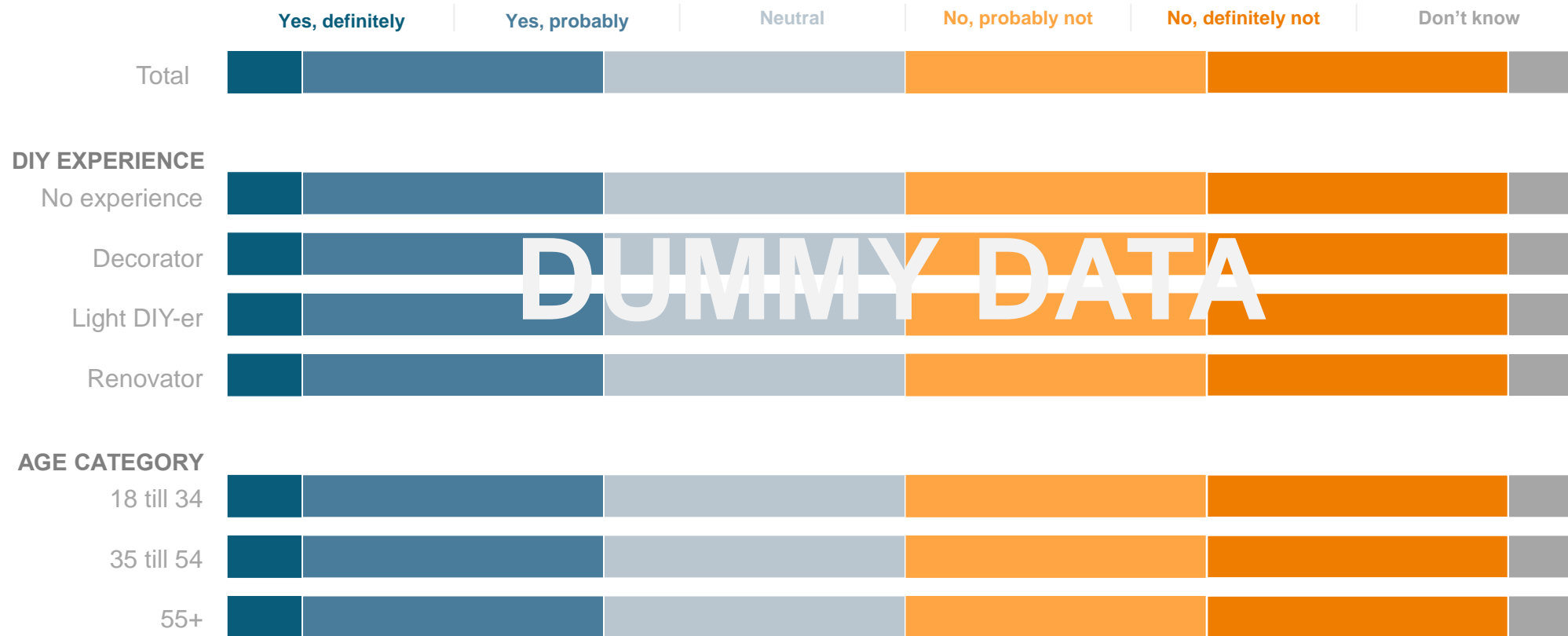
DUMMY DATA



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Plans in the next 30 days – by segment

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



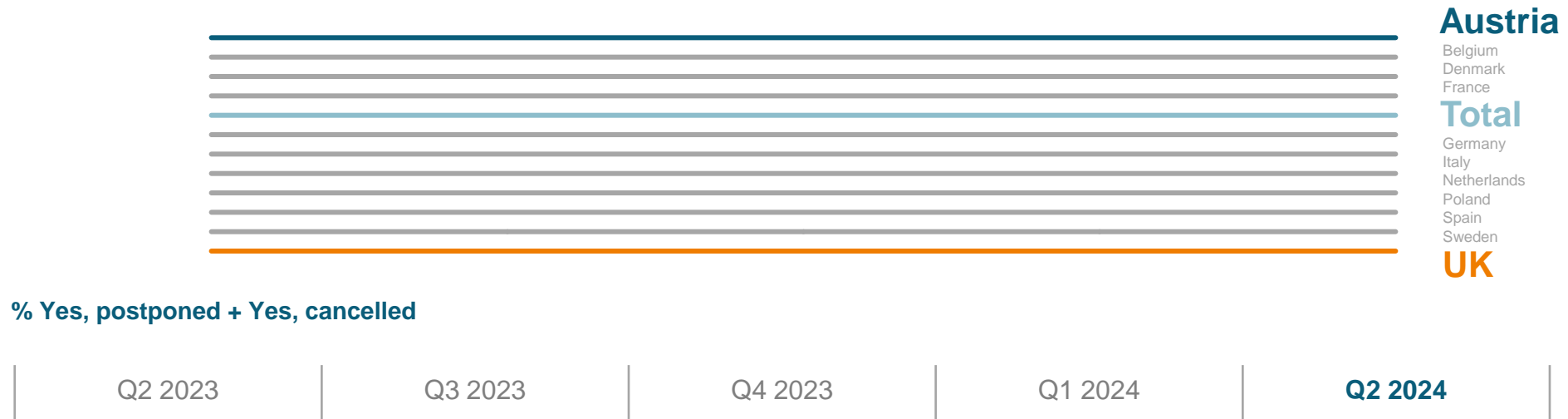
Base: N = 6,636
 Values below 5% are not labelled

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Postponed / cancelled home improvement project

In the last 30 days, have you postponed or cancelled a home improvement, repair or maintenance project you planned to start?

DUMMY DATA

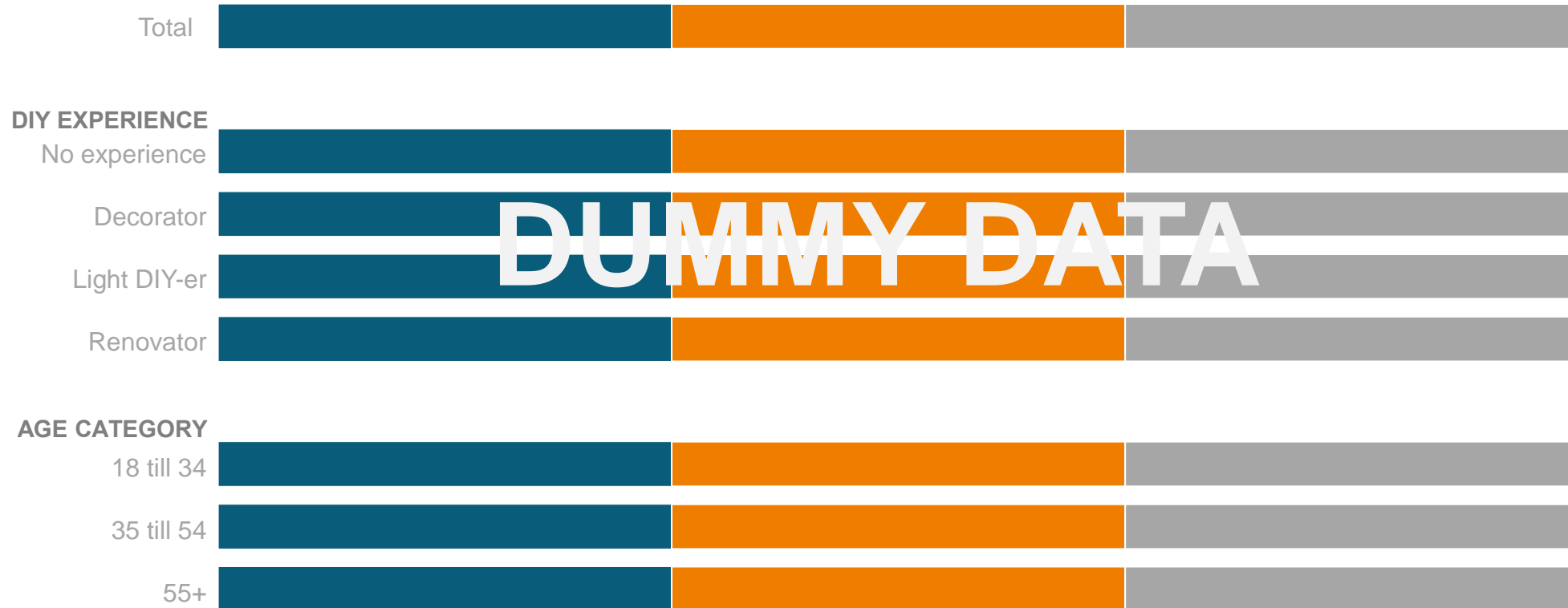


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Moving plans

Do you have plans to move within the next 12 months?

Yes | No | Don't know

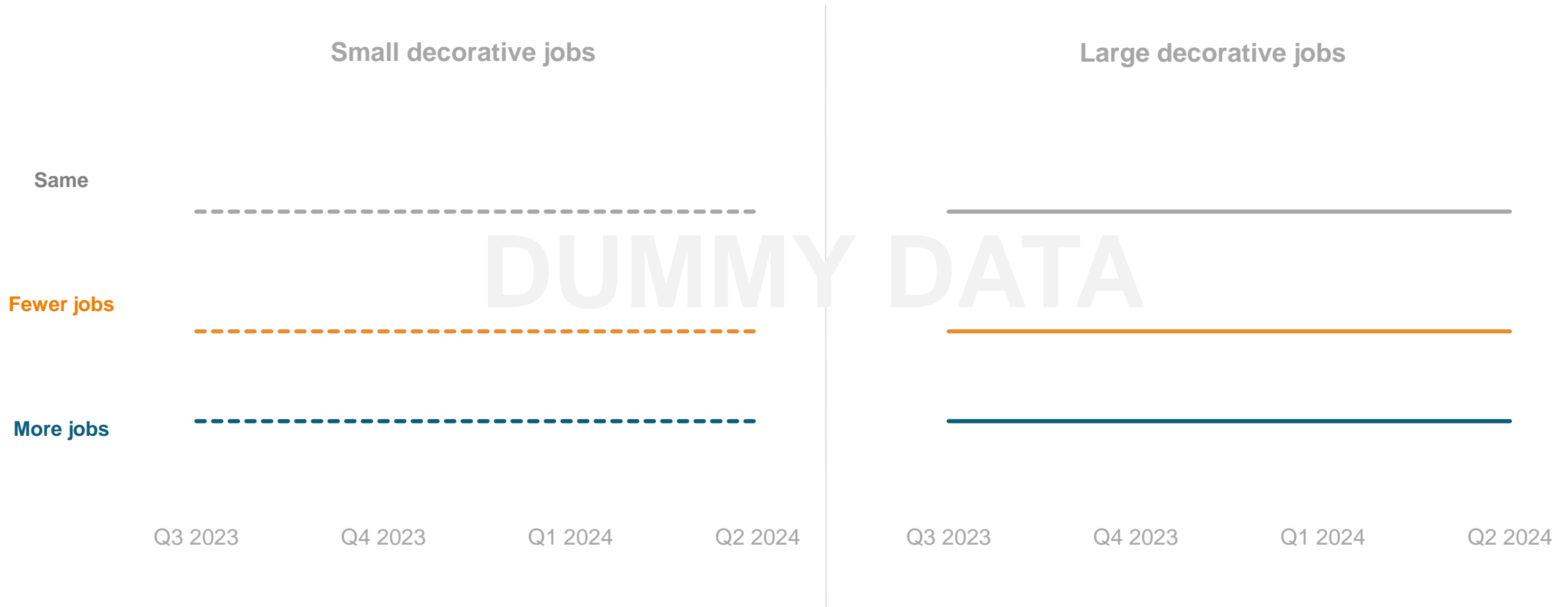


Base: N = 6,636

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Outlook on decorative jobs compared to the same period in 2023

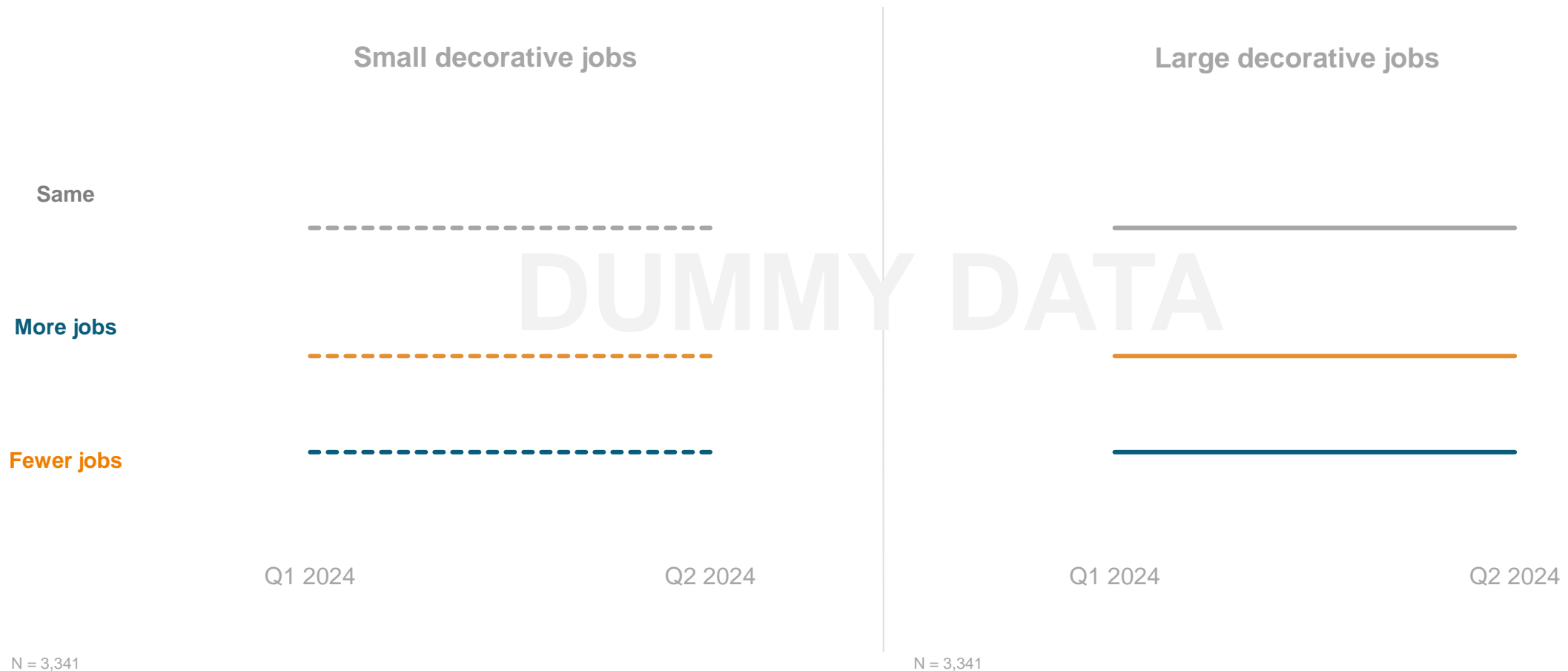
Looking forward to the months **July-September**, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than the same period last year?



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Outlook on decorative jobs compared to the same period in 2023

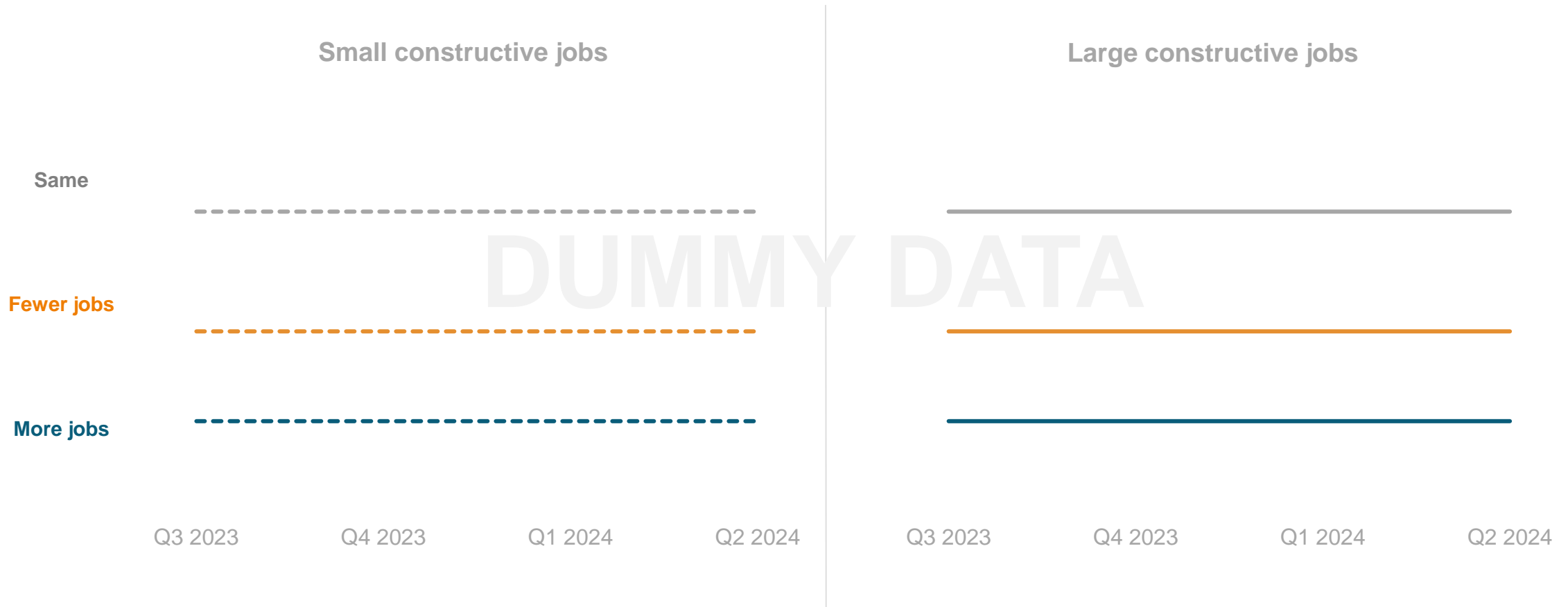
Looking forward **to the next 12 months**, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than the same period last year?



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Outlook on constructive jobs compared to the same period in 2023

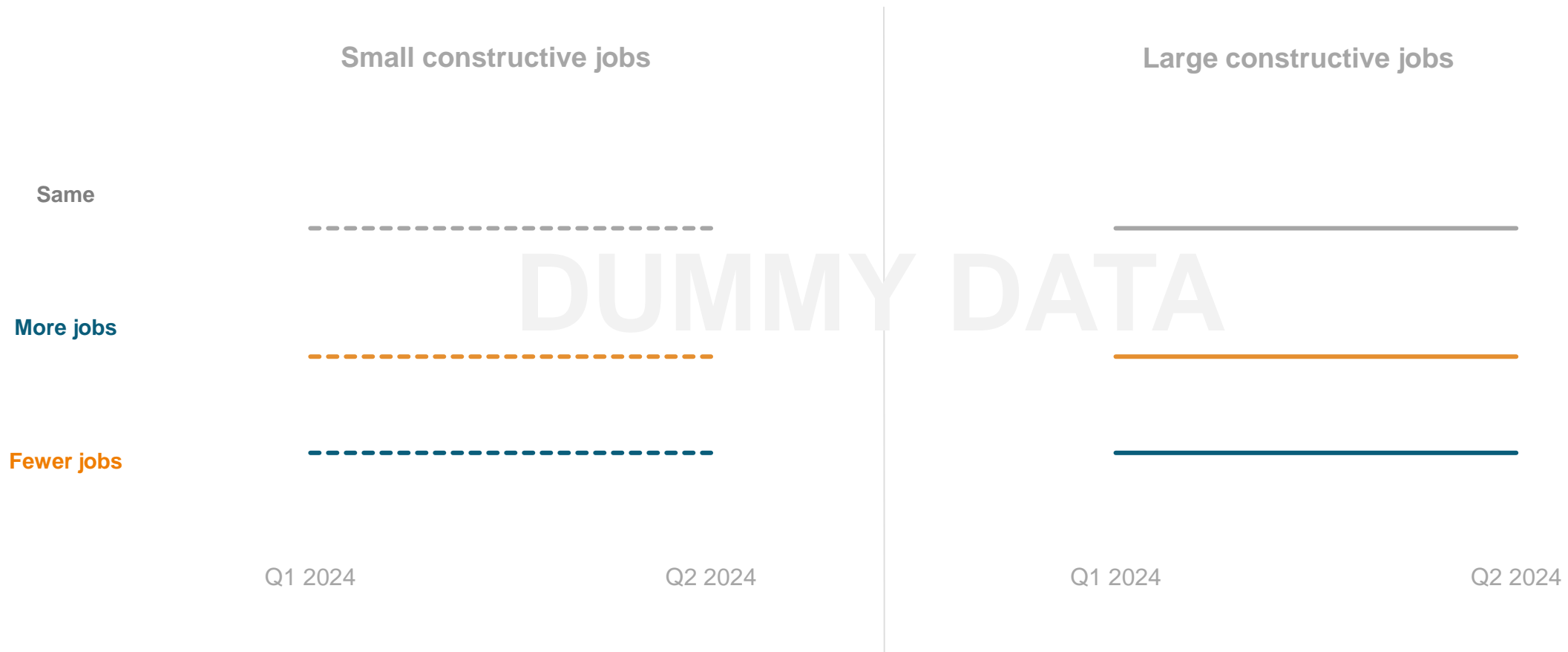
Looking forward to the months July-September, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than the same period last year?



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Outlook on constructive jobs compared to the same period in 2023

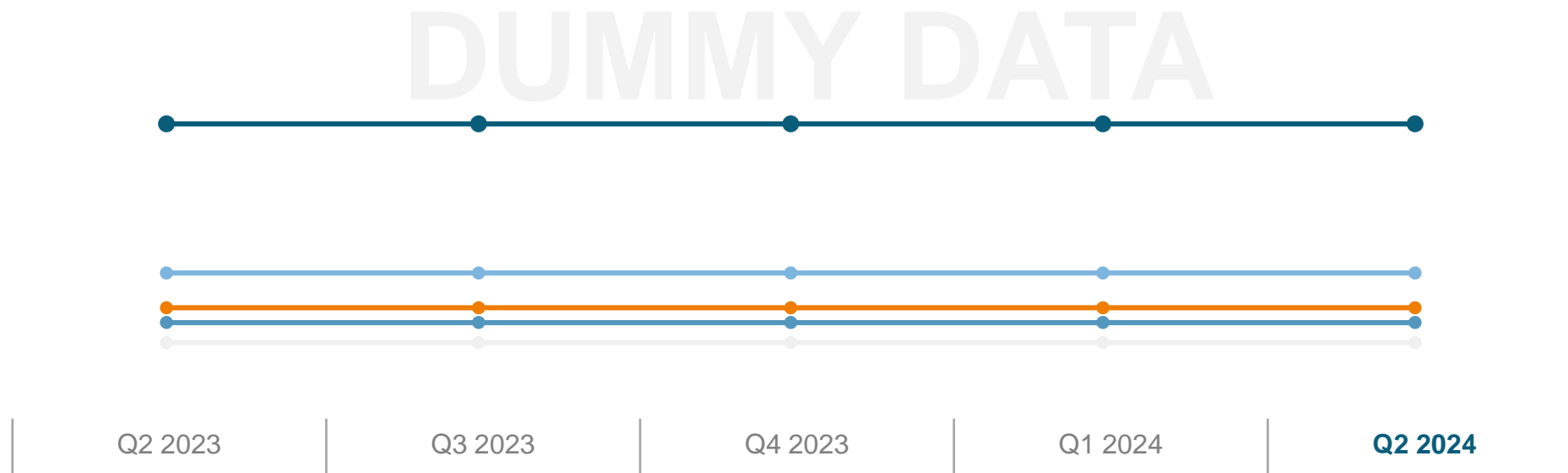
Looking forward **to the next 12 months**, do you expect the number of home improvement jobs in- or outside your home to be more, the same or less than the same period last year?



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Cancellation reasons

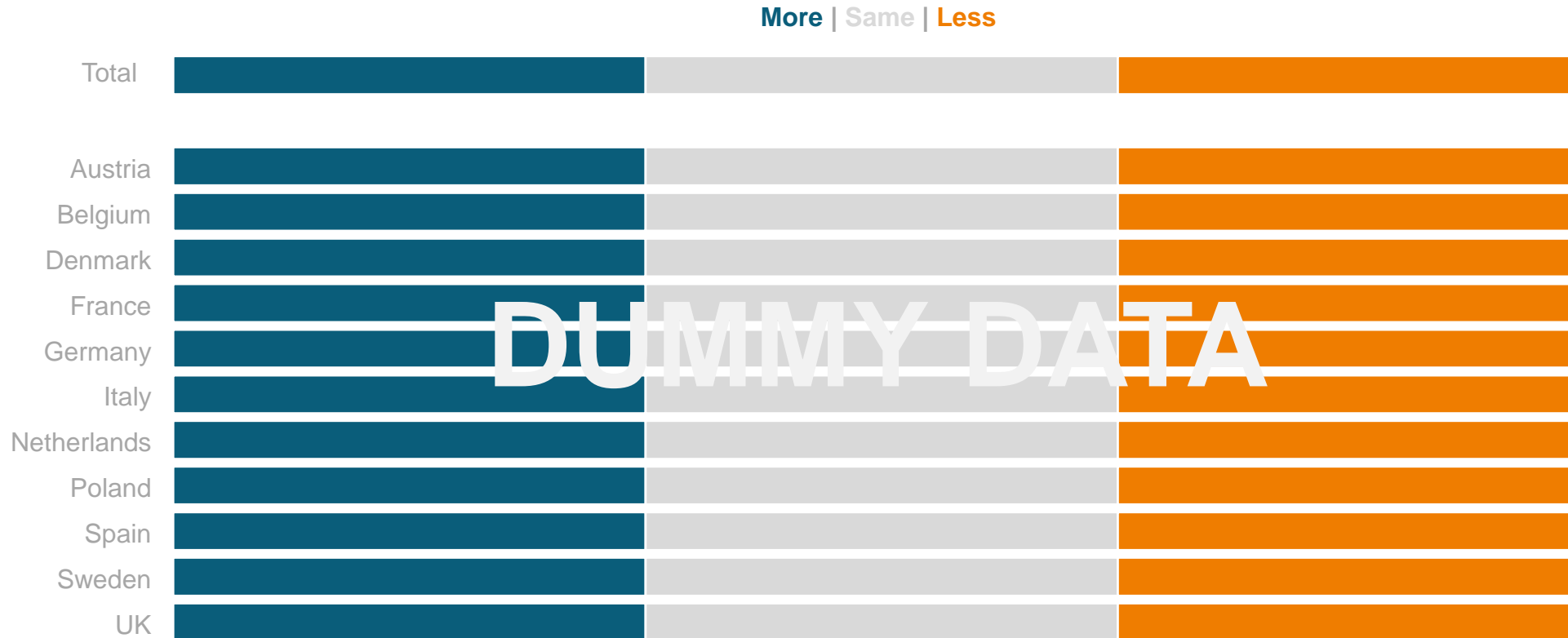
Why did you postpone or cancel your home improvement, repair or maintenance project?



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Spending on improvement jobs

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

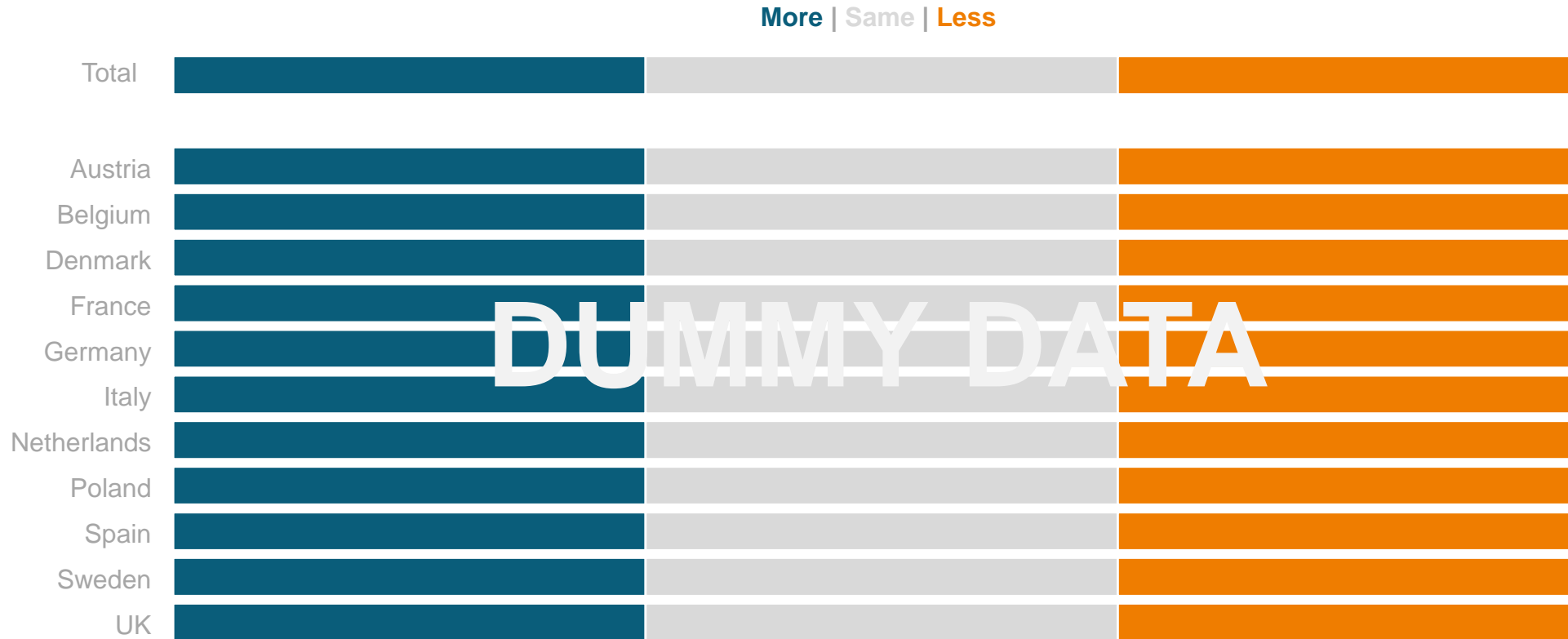


Base: N = 3,295

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Spending on improvement jobs

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



Base: N = 3,341

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Start a project under €5.000

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

(Very good + good time) – (Very bad + bad time)



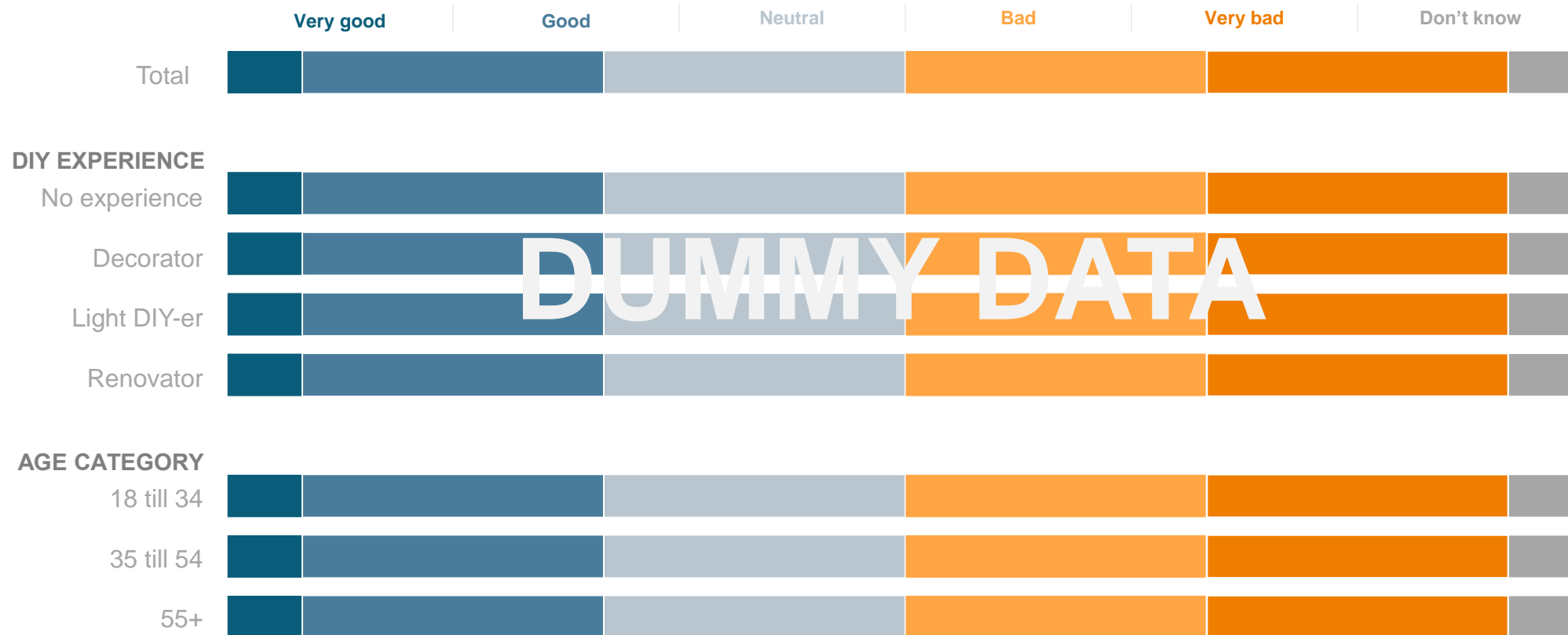
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DUMMY DATA

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Start a project under €5.000

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



Base: N =6,636
 Values below 5% are not labelled

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Start a project over €5.000

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

(Very good + good time) – (Very bad + bad time)



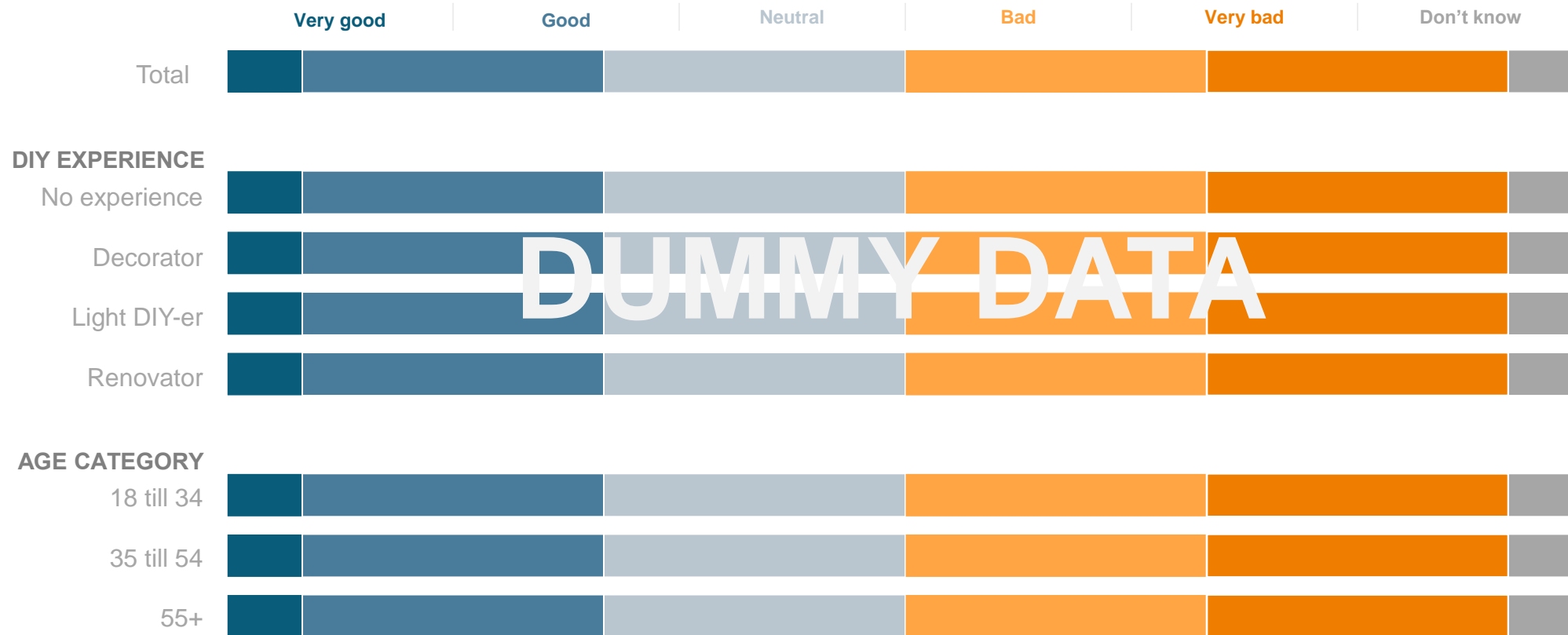
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Start a project over €5.000

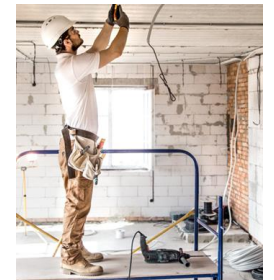
Do you feel this month is a good or bad time to start a project over €5.000 for home improvement, repair or maintenance?



Base: N= 6,636
 Values below 5% are not labelled

Summary: Outlook for Home Improvement Product Spending

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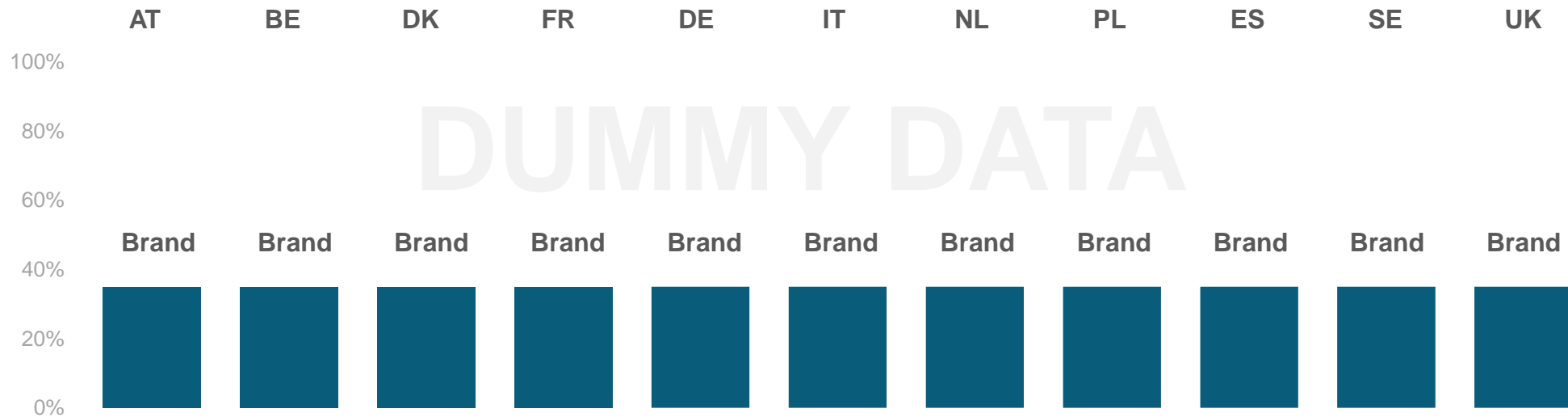
Home improvement per category



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Top of mind website

What website comes to mind first when you think about online purchasing of **home improvement products**:



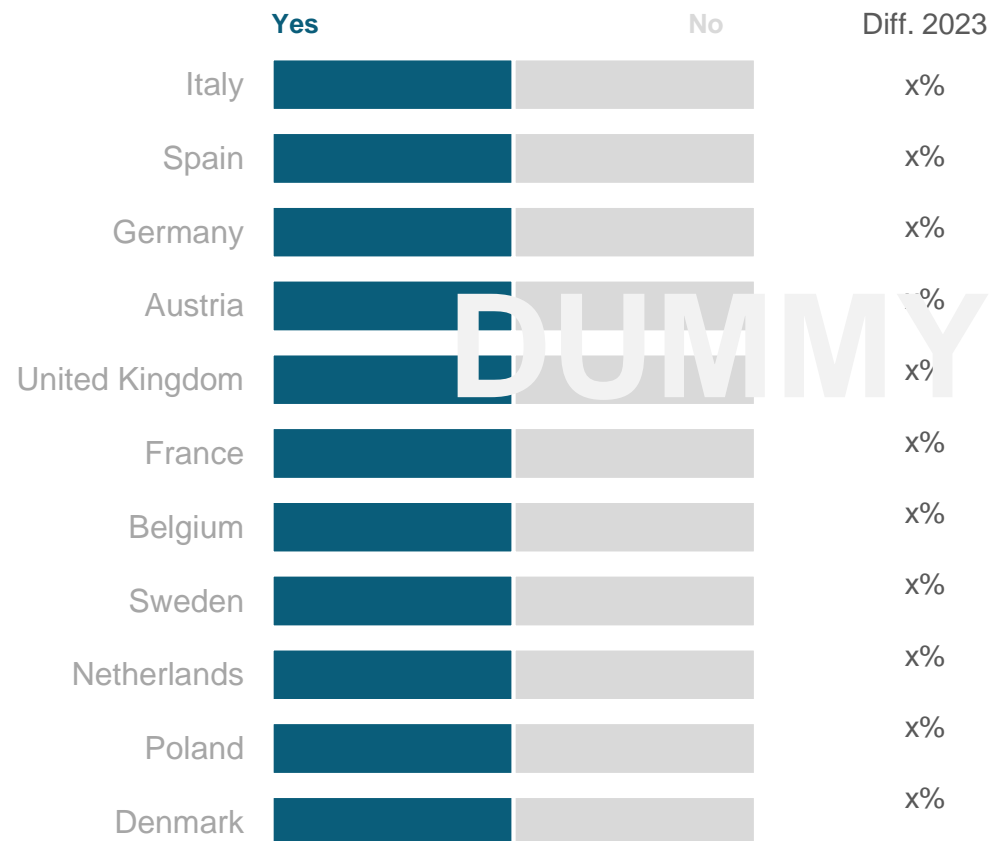
% of most mentioned by country

#2	#2	#2	#2	#2	#2	#2	#2	#2	#2	#2
x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
#3	#3	#3	#3	#3	#3	#3	#3	#3	#3	#3
x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

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Purchases via Amazon

Have you purchased any products online via Amazon in the past 12 months?

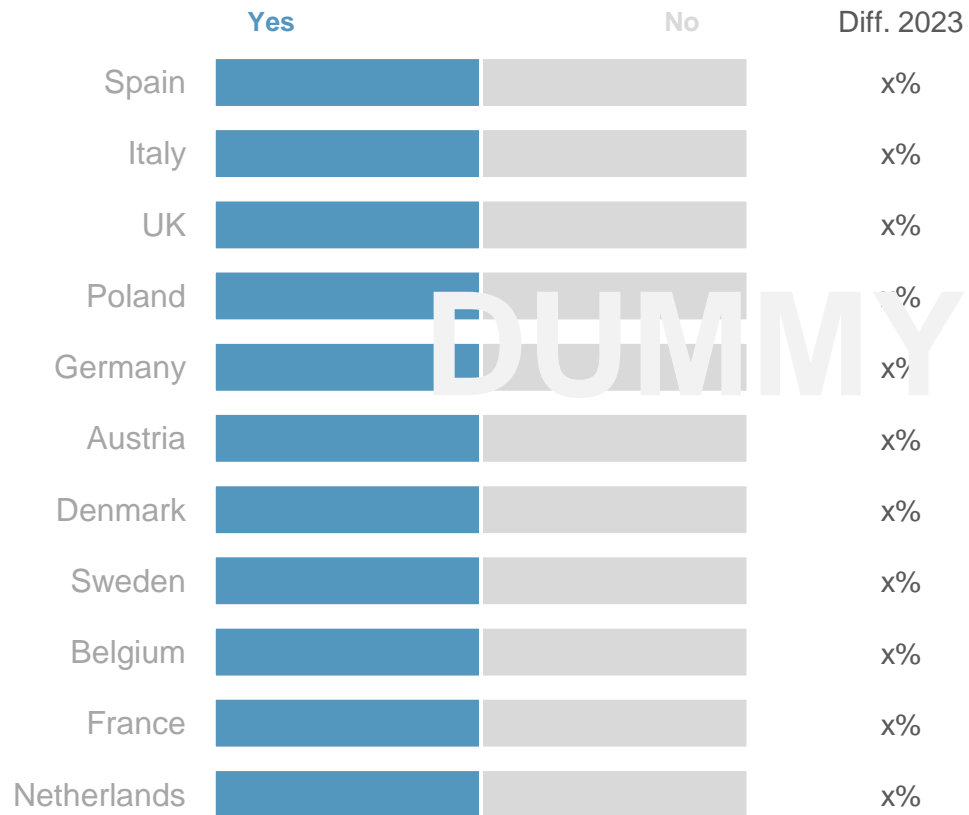


DUMMY DATA

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Home improvement purchases via Amazon

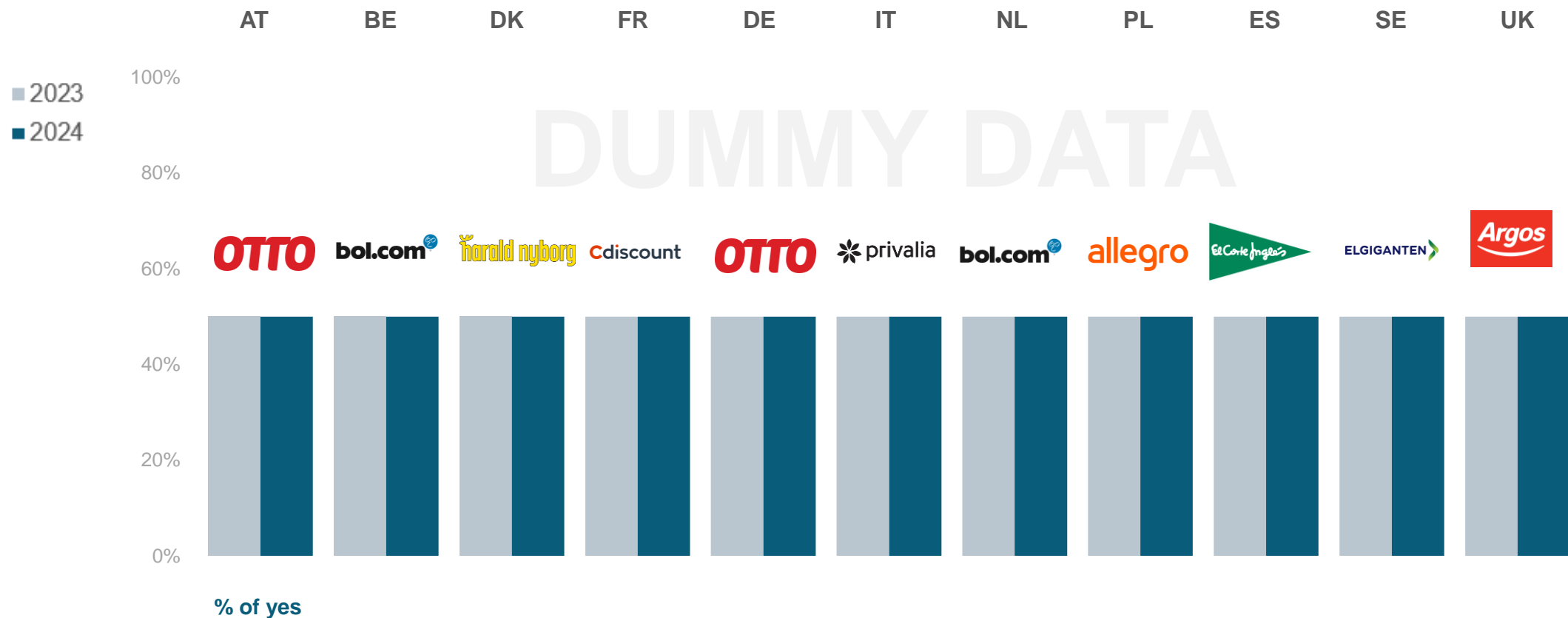
Have you purchased any home improvement products via Amazon in the past 12 months?



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Home improvement purchasing via national number one retailer

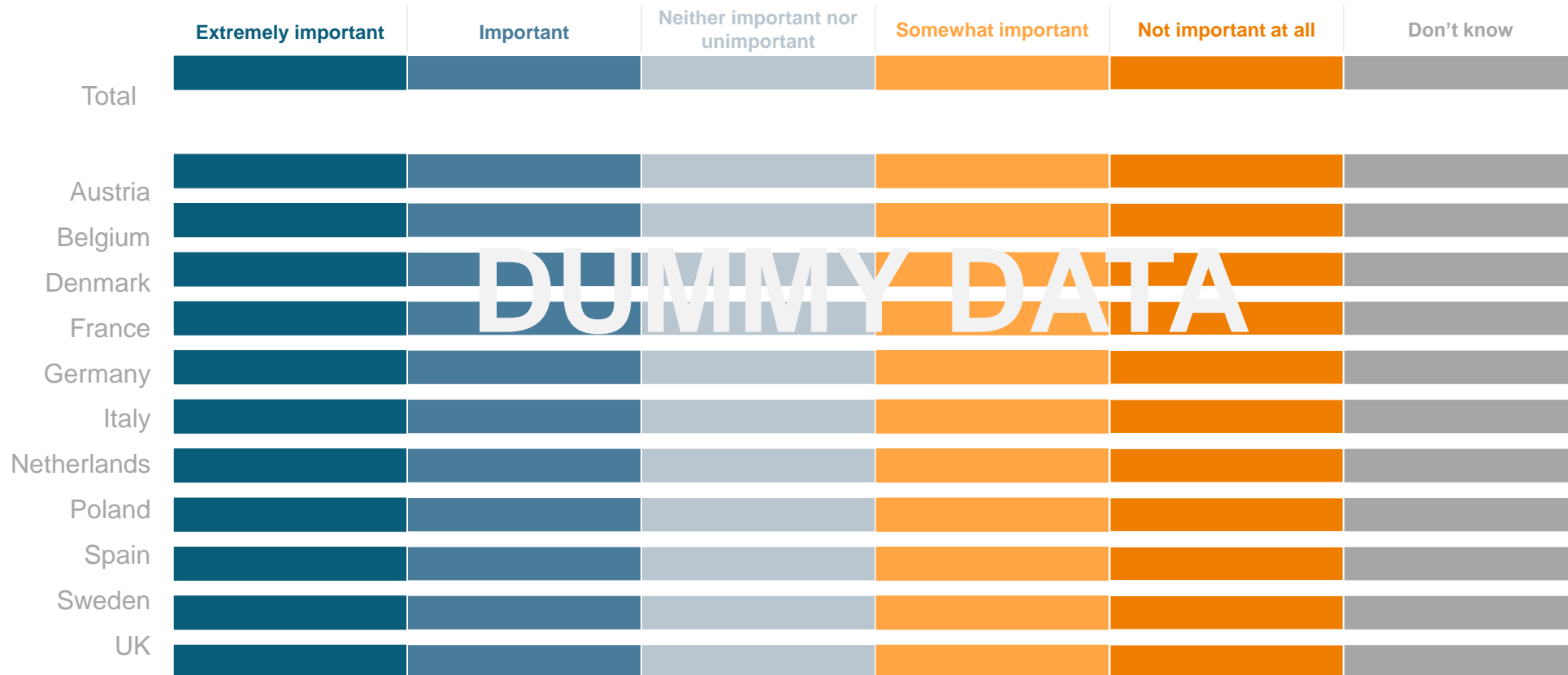
Have you purchased any home improvement products via national number one online retailer in the past 12 months?



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Customer reviews and ratings

How important are customer reviews and ratings in your decision to purchase home improvement products online?

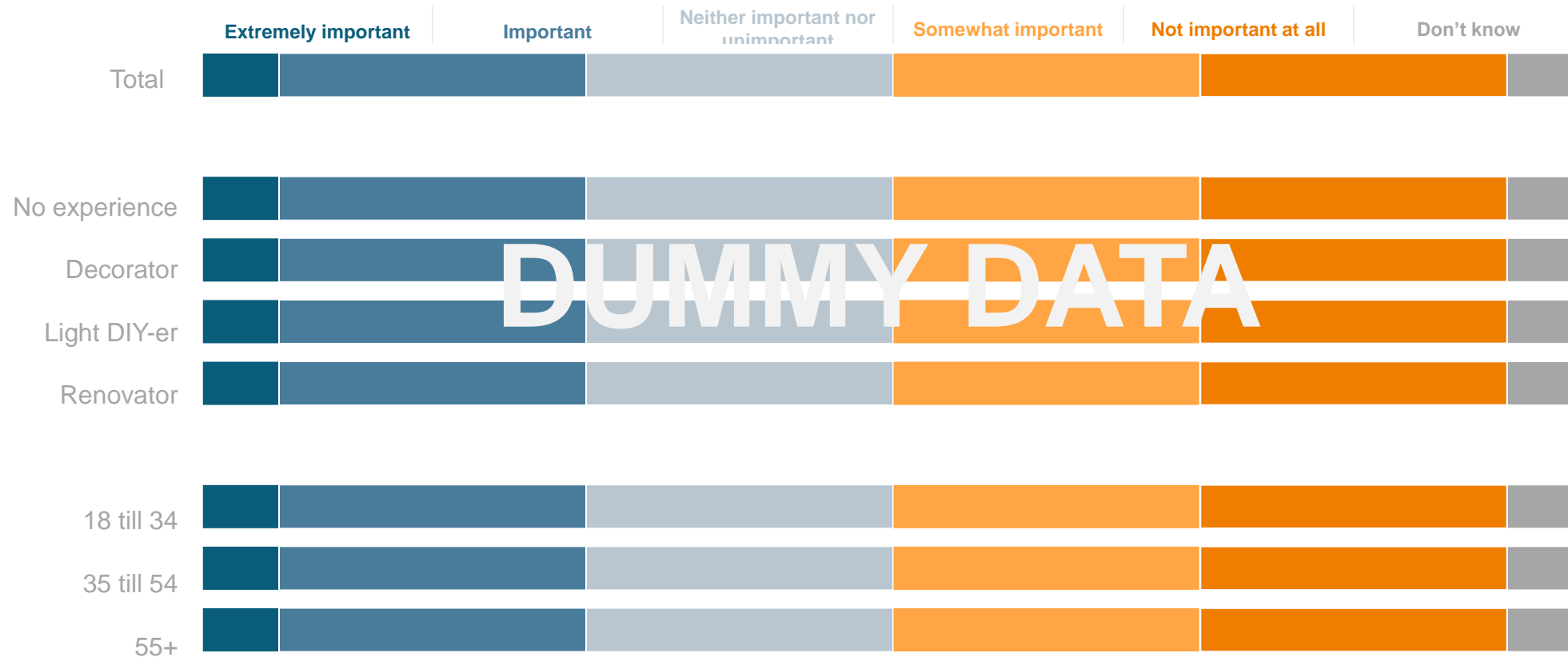


Base: N= 6,636
 Values below 5% are not labelled

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Customer reviews and ratings

How important are customer reviews and ratings in your decision to purchase home improvement products online?

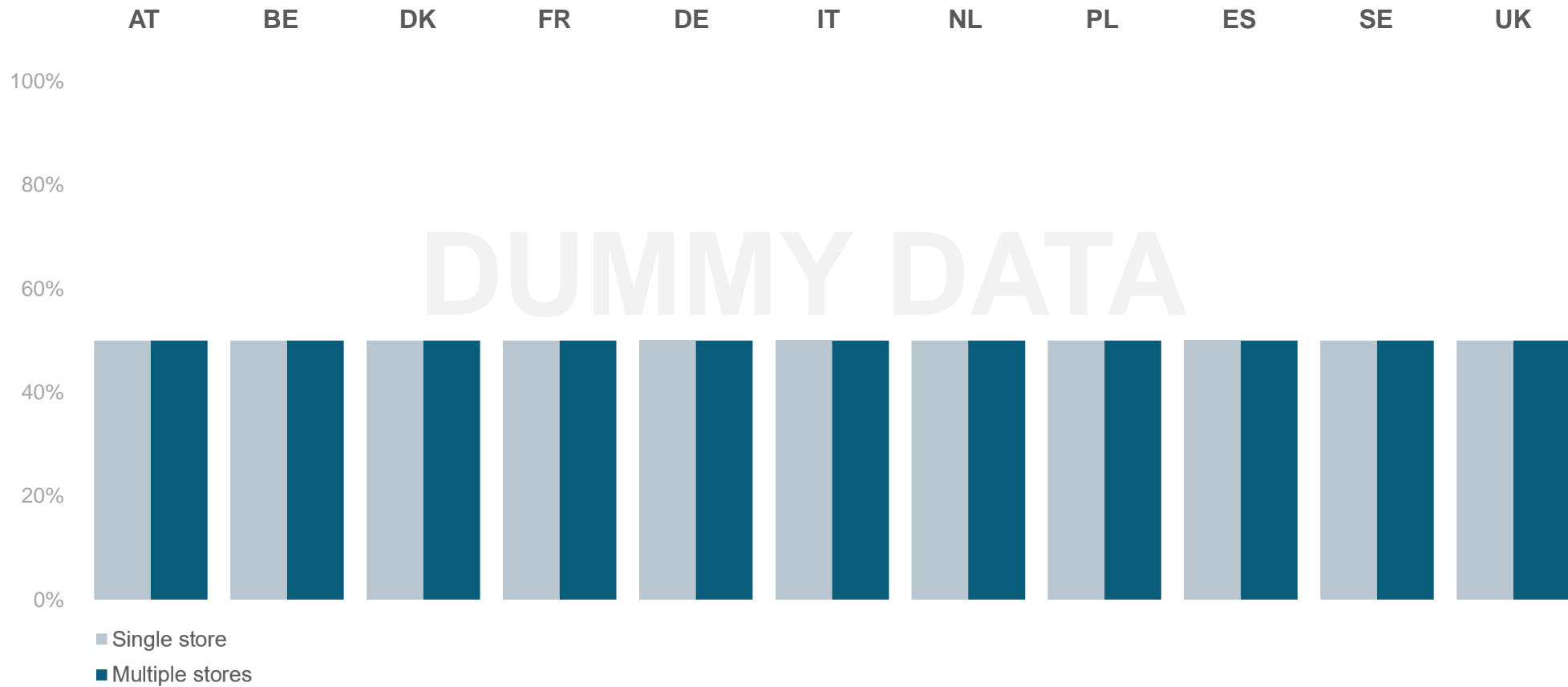


Base: N= 6,636
 Values below 5% are not labelled

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Home improvement purchasing at a single store or multiple stores







Do you purchase most of your home improvement products at a single store or multiple stores?



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Reasons for buying home improvement products at certain channels

For what reasons would you buy home improvement products at the following channels?

	DIY Stores	E-tailers	Amazon	Ebay	AliExpress	Temu	Social media
Lorem ipsum 	x%	x%	x%	x%	x%	x%	x%
Lorem ipsum 	x%	x%	x%	x%	x%	x%	x%
Lorem ipsum 	x%	x%	x%	x%	x%	x%	x%
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Lorem ipsum 	x%	x%	x%	x%	x%	x%	x%
Lorem ipsum 	x%	x%	x%	x%	x%	x%	x%

DUMMY DATA

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Online platforms used for inspiration

Which online platforms do you expect to use for inspiration when you want to renovate your living room, bathroom or kitchen?

	Total	AT	BE	DK	FR	DE	IT	NL	PL	ES	SE	UK
	N 6636	604	609	601	601	601	600	608	601	602	608	601
Online platform		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Online platform		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Online platform		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Online platform		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Online platform		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Online platform		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Online platform		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Online platform		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Online platform		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Other		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Don't know		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

DUMMY DATA

Base: N = 6,636

Summary: Purchase Channels

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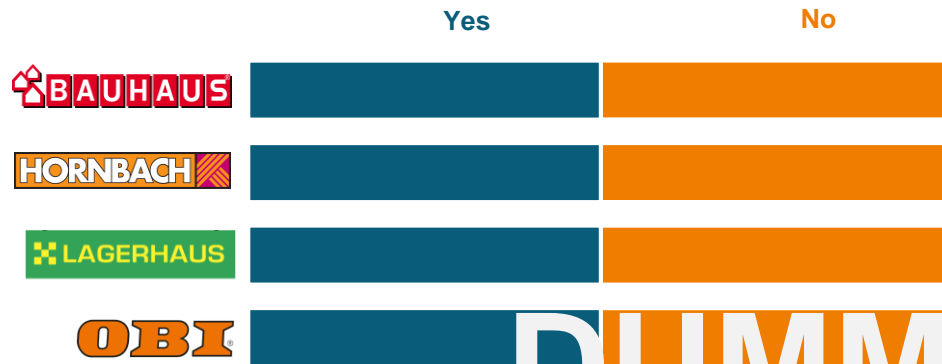
Home improvement per category



AUSTRIA

Online purchases

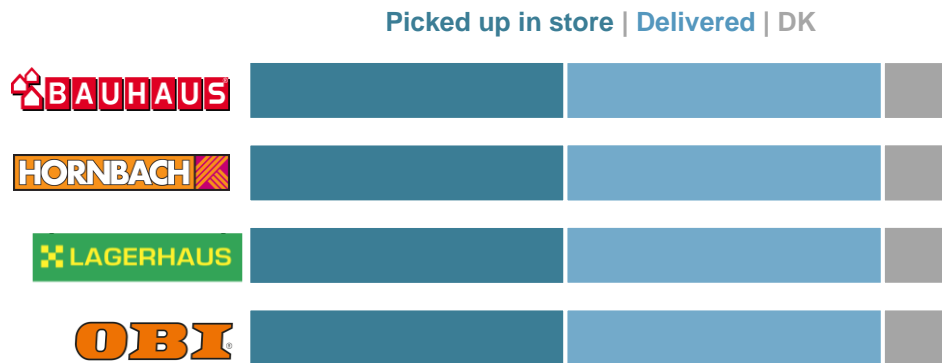
Have you purchased anything online at the following online stores during the past 6 months?



N = 604

Pick-up or delivery

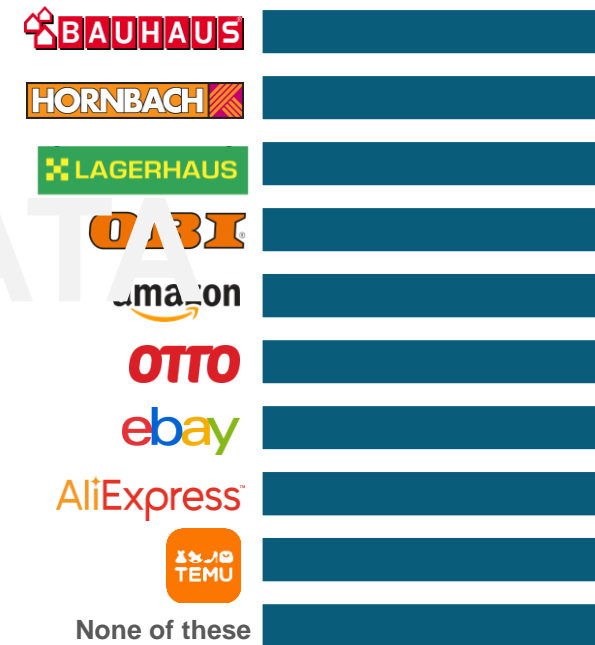
Did you pick up the purchased product(s) in the store or was it delivered to your home?



N = xxx

Online purchases

Which of these applications do you have on your phone?



N = 604

AUSTRIA

Online purchases

What rating do you give the following aspects at the following stores? [1 to 10]

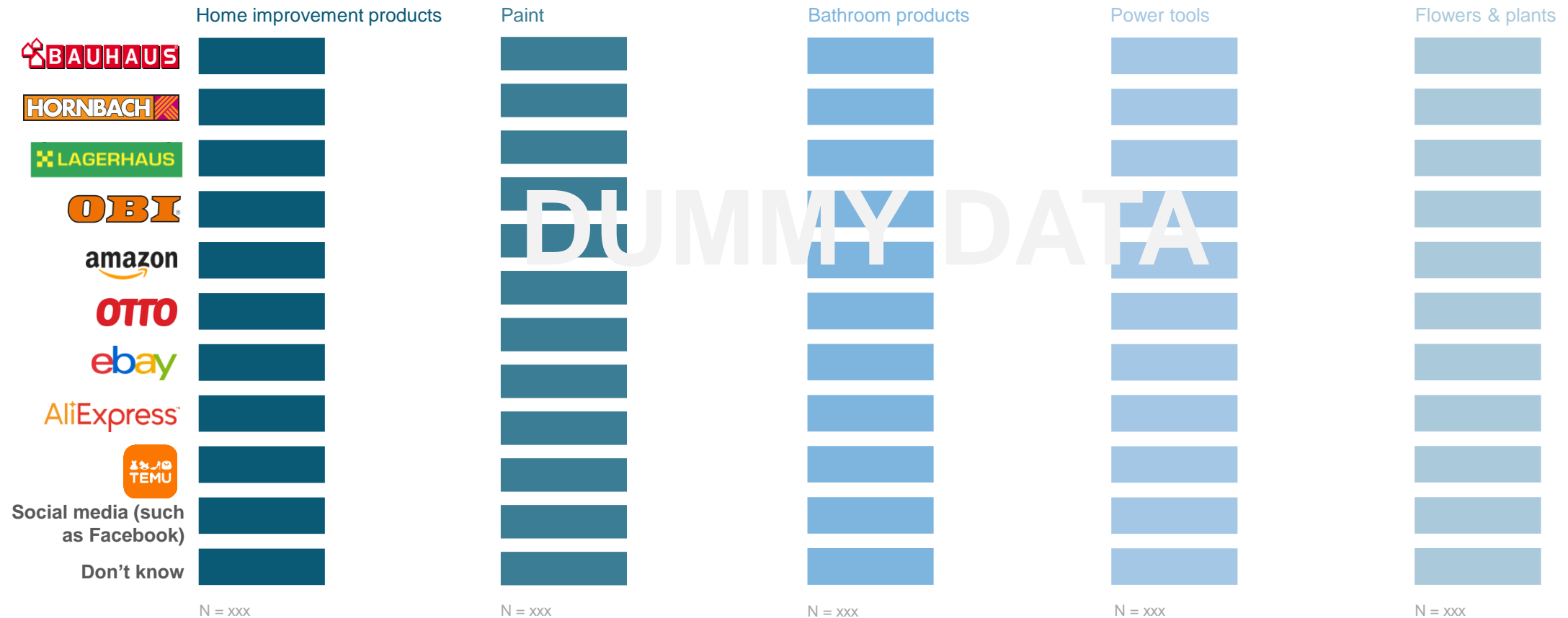


Bauhaus | Hornbach | OBI | Toom | Amazon | Otto



AUSTRIA

Purchase channel preference Where would you prefer to buy...?



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USP Marketing Consultancy

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