



# European Home Improvement Monitor Q2 2024

## Purchase Channels

# 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:**

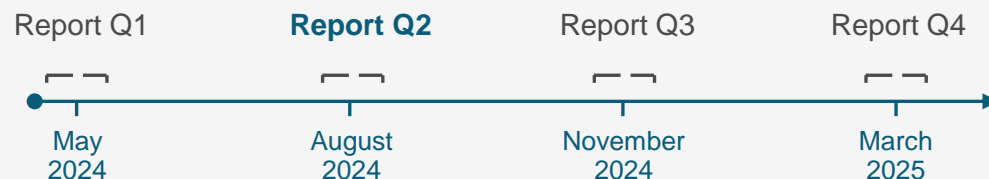
Q1: Needs & willingness to invest in sustainability

**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

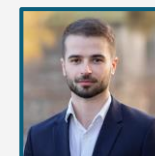


## PROJECT TEAM



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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.

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## Economic Developments

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

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

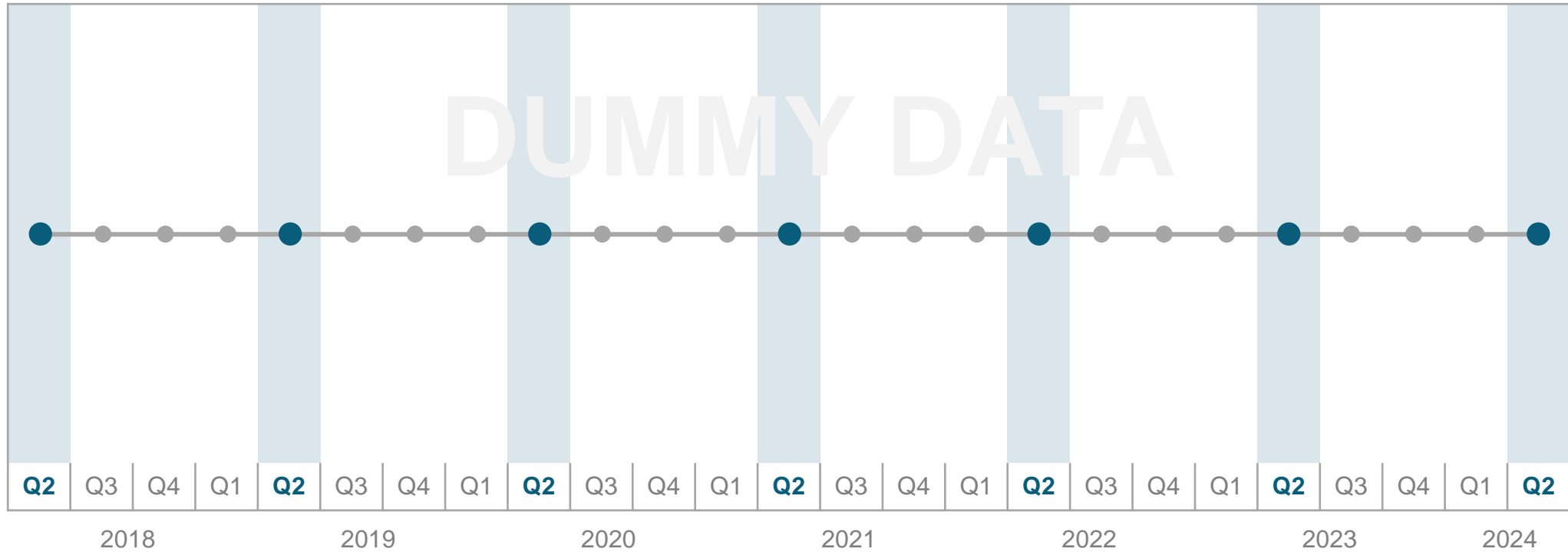
Respondents were asked:

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



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Share of households that have done a home improvement job  
2024 Q2



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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



## 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/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?

## Country Overview

In this chapter, we examine purchase channel trends on a country level:

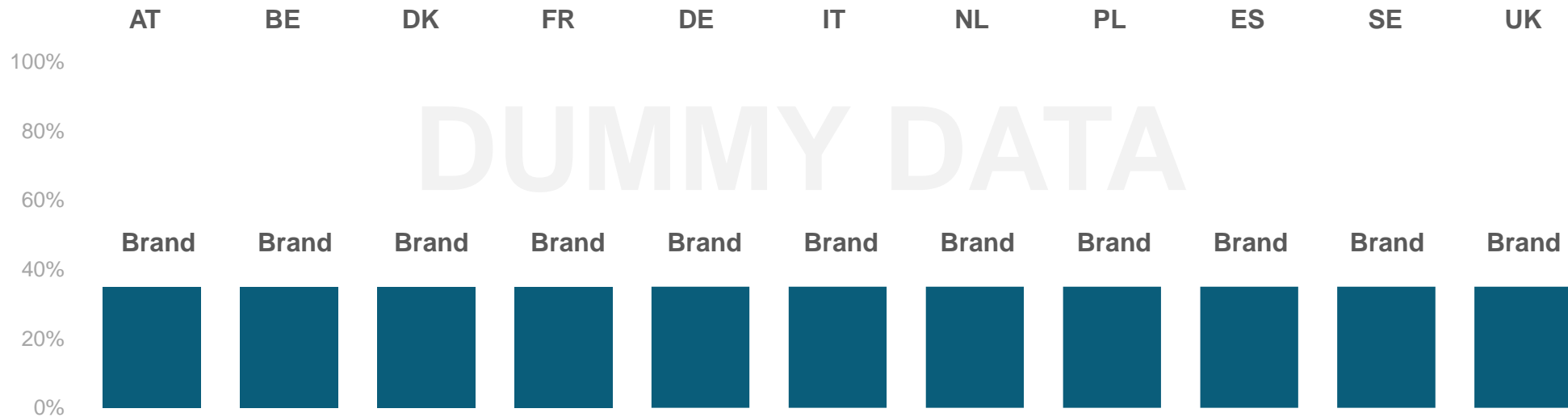
- Have you purchased anything online at the following online stores during the past 6 months?
- Did you pick up the purchased product(s) in the store or was it delivered to your home?
- Which of these applications do you have on your phone?
- What rating do you give the following aspects at the following stores? [1 to 10]
- Where would you prefer to buy Paint / Bathroom products (tap, showerhead, wash basin etc.) / Power tools / Flowers & plants?



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## Top of mind website

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



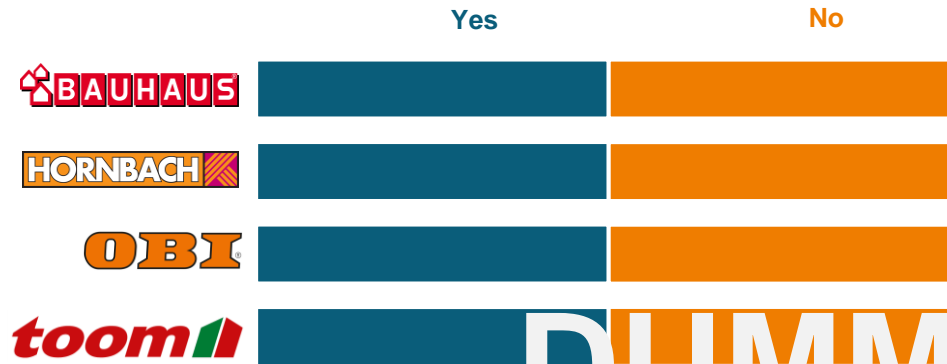
% of most mentioned by country

#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%

# GERMANY

## Online purchases

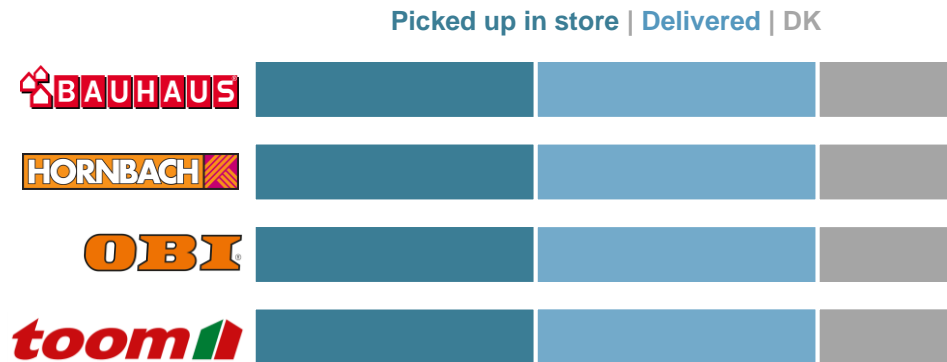
Have you purchased anything online at the following online stores during the past 6 months?



N = 601

## Pick-up or delivery

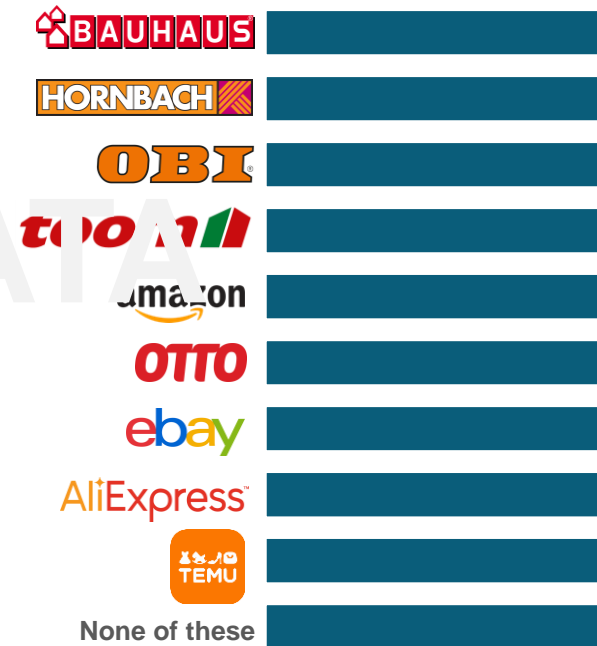
Did you pick up the purchased product(s) in the store or was it delivered to your home?



N = x

## Online purchases

Which of these applications do you have on your phone?



N = 601

# GERMANY

## Online purchases

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

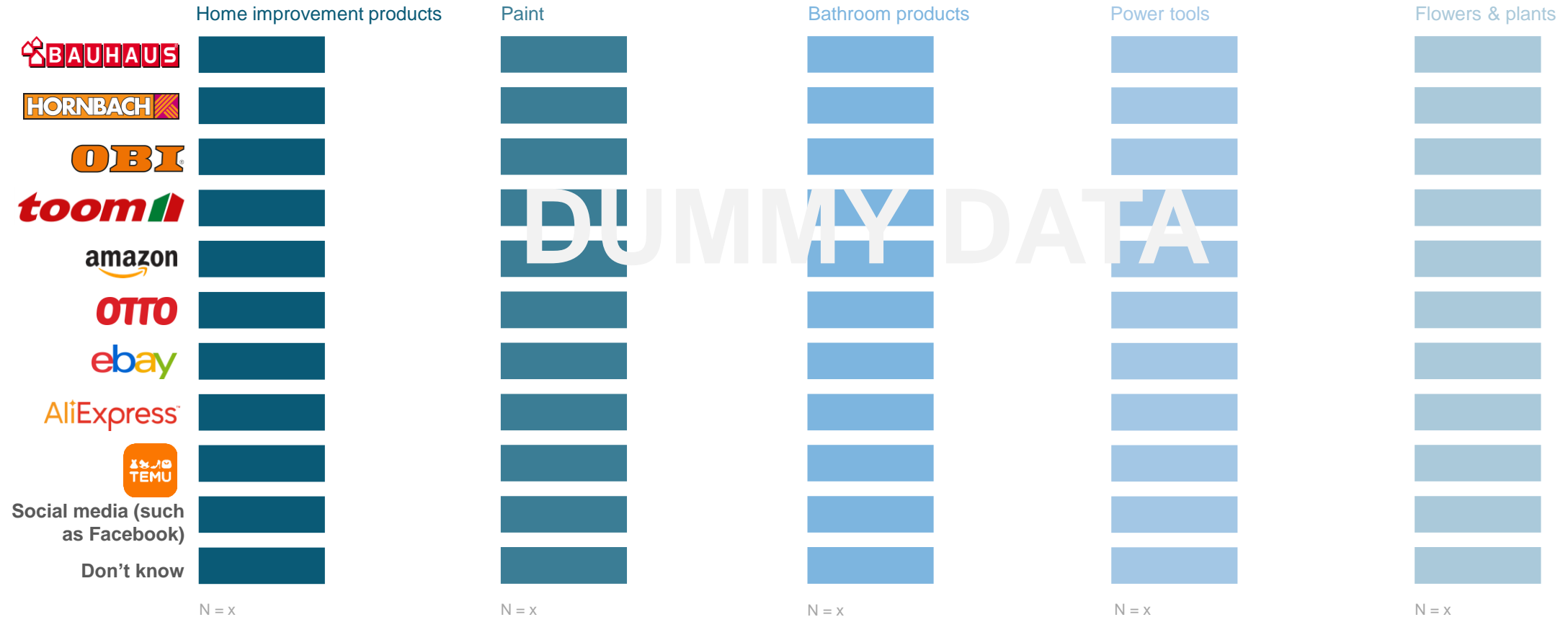


Bauhaus | Hornbach | OBI | Toom | Amazon | Otto



# GERMANY

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



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# Product Categories

## 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)									

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