



**European Home Improvement Monitor Q2 2022**  
Purchase channels

A product by **USP** Marketing Consultancy

# Preface

The European market is going through turbulent times. The continent has to deal with an energy crisis, the war in Ukraine, and high inflation (a record high of 9.8% in August, according to Eurostat). The high energy prices are the main driving force of this inflation. These developments have an impact on the home improvement market as well.

Even though in Q1, we noticed that plans for home improvement remained unchanged in most European countries. In Q2, we see that ... households did home improvement projects. Also, the total money spent on home improvement ...

This report focuses on purchase channels. We notice that some consumers are ... now that the COVID-19 restrictions are behind us. The ... are gaining market share from ... players in the home improvement segment like .... More on this can be found in the theme chapter; “purchase channels”.



## 2022 IN-DEPTH TOPICS

### Q1: Orientation

Rise of digital natives – new ways for inspiration & orientation on DIY products

### Q2: Purchase channels

Mapping out the online leaders in home improvement

### Q3: Branding

The future for name brands and private labels in home improvement

### Q4: Do-It-Yourself or Do-It-For-Me

Drivers and barriers for doing or outsourcing home improvement jobs.

# TEAM Members



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

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EUROPEAN DEVELOPMENTS

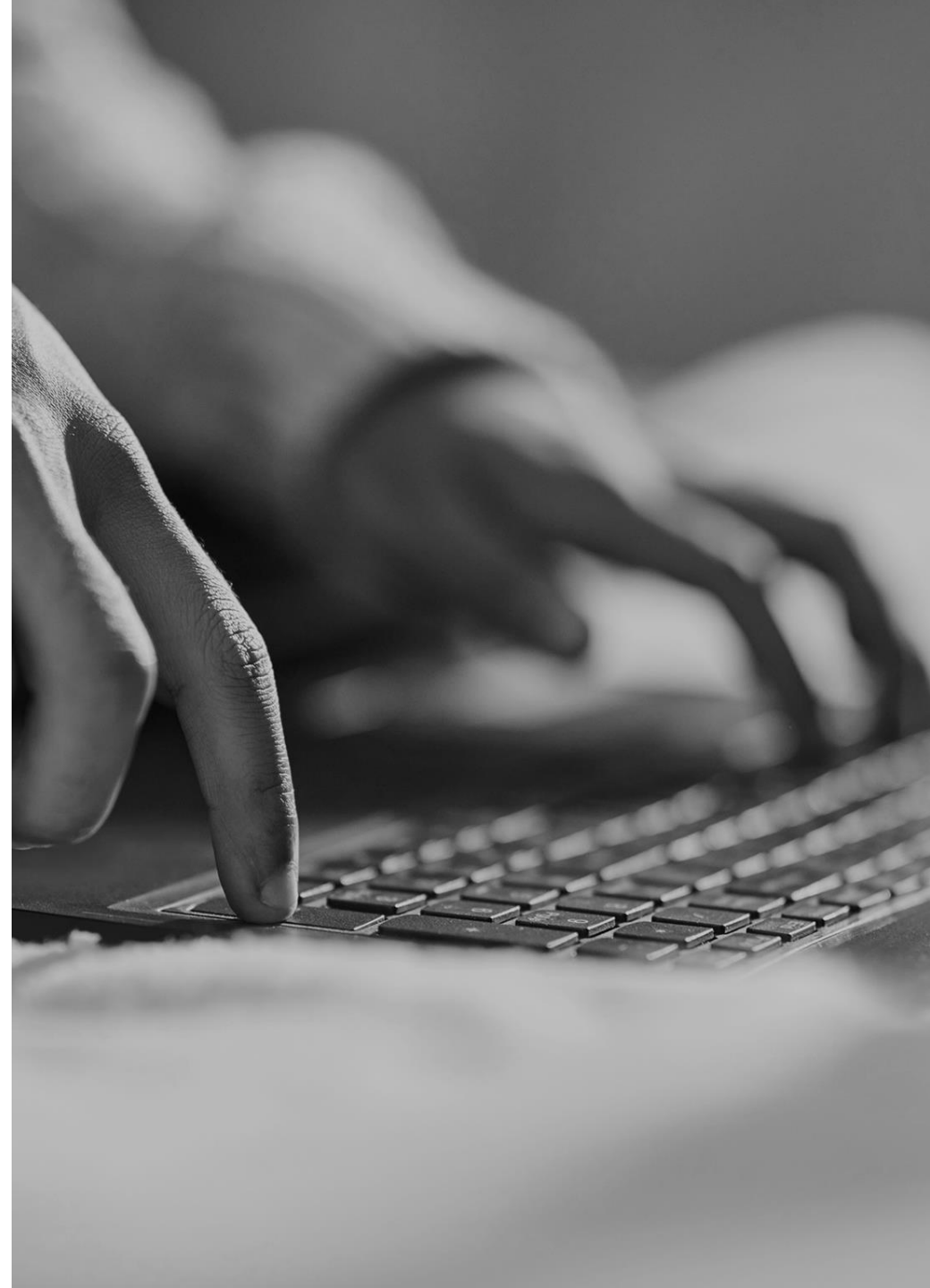
THEME: PURCHASE CHANNELS

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### Spending on home Improvement is ....

After the booming DIY years of 2020 and 2021, the market is changing, and consumers spend less on home improvement. During the 1st quarter of this year, spending on home improvement was ..... However, in the 2nd quarter, European consumers spent .... on home improvement than they did in the same quarter of last year.

Not only was spending .... but also the share of households that did one or more home improvement jobs was .... (... in Q2 2022 versus ... in Q2 2021).

### Is the share of online purchases in ...?

The answer to this question depends on how you compare the years. If you would strictly compare the online share in 2022 with the previous year, it is indeed .... On the other hand, if you look at the long-term development, we see ...

The current share of ... of online home improvement purchases is in line with ... So you could say that the percentage of online purchases is ...

Nevertheless, we still see significant differences between countries' share of online purchased home improvement products. The online share in ... and the ... is almost at 20%. In contrast, in ... and ..., the online share is around 6%.

Share of European households that have done a home improvement job



Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
2016			2017			2018			2019			2020			2021			2022						

### Where did you buy the product?

[TREND]

Purchase channel	2019	2020	2021	2022 H1
Online shop Actual share	x%	x%*	x%*	x%
Online shop Normal expected development	x%	x%	x%	x%

\* Accelerated growth due to COVID-19

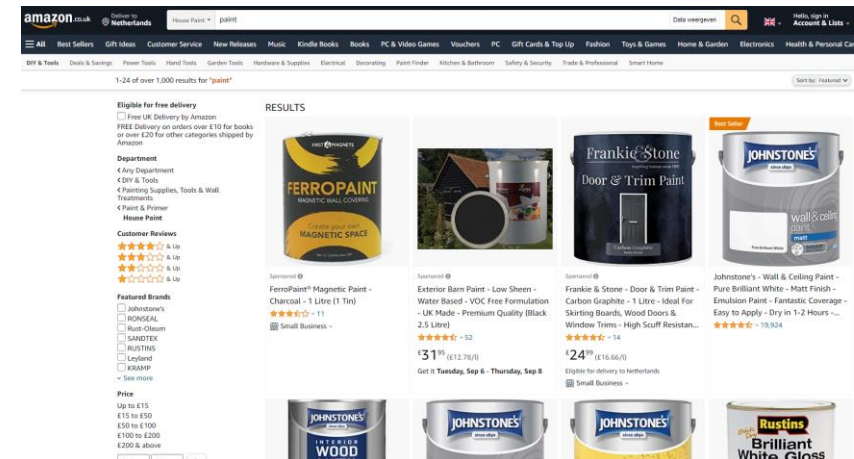
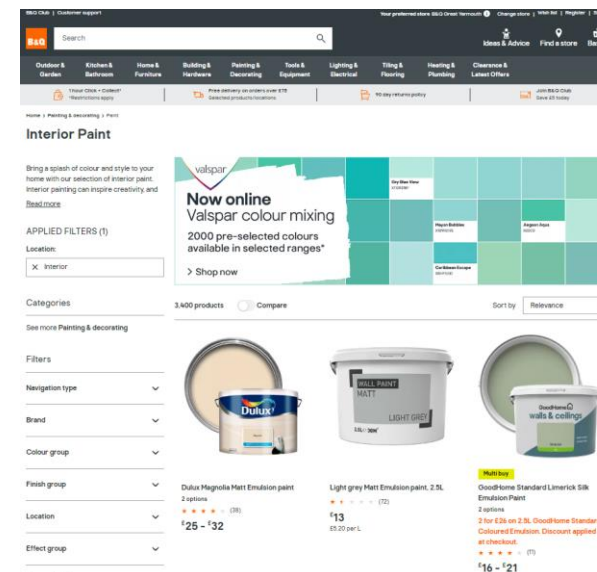
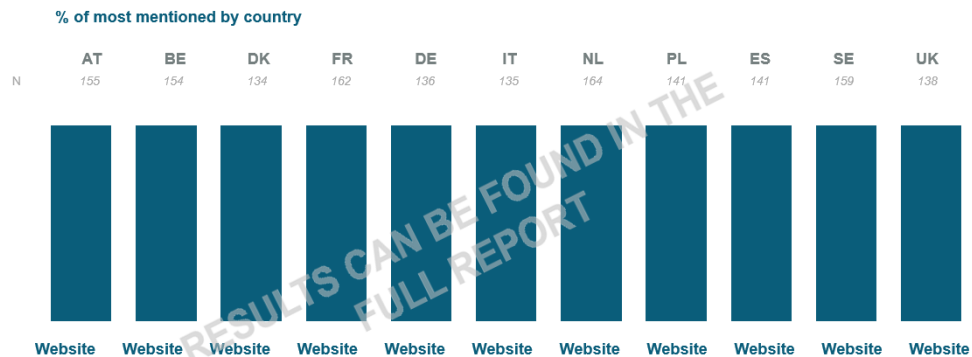
## DIY stores are ... against the online giants

All large European DIY stores opened or upgraded their online channel in the previous decade. However, at the time, they were quickly losing market share against new entrants in the home improvement industry. These were the online giants like Amazon and large national e-tailers that offered an enormous assortment to the consumers. These pure online players were also selling home improvement products to consumers. However, they did not seem to focus as much on the DIY categories as the DIY stores did in previous years. The online shops of the traditional DIY chains appear more sophisticated than the DIY categories of the pure online players.

To test the mental availability of these online operations, we asked consumers, “What website comes to mind first when you think about online purchasing of home improvement products?”. As you can see below, in 9 out of 11 countries, a ... was mentioned the most. This means that ... are the online winners in the minds of consumers at this moment.

### Top of mind website

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



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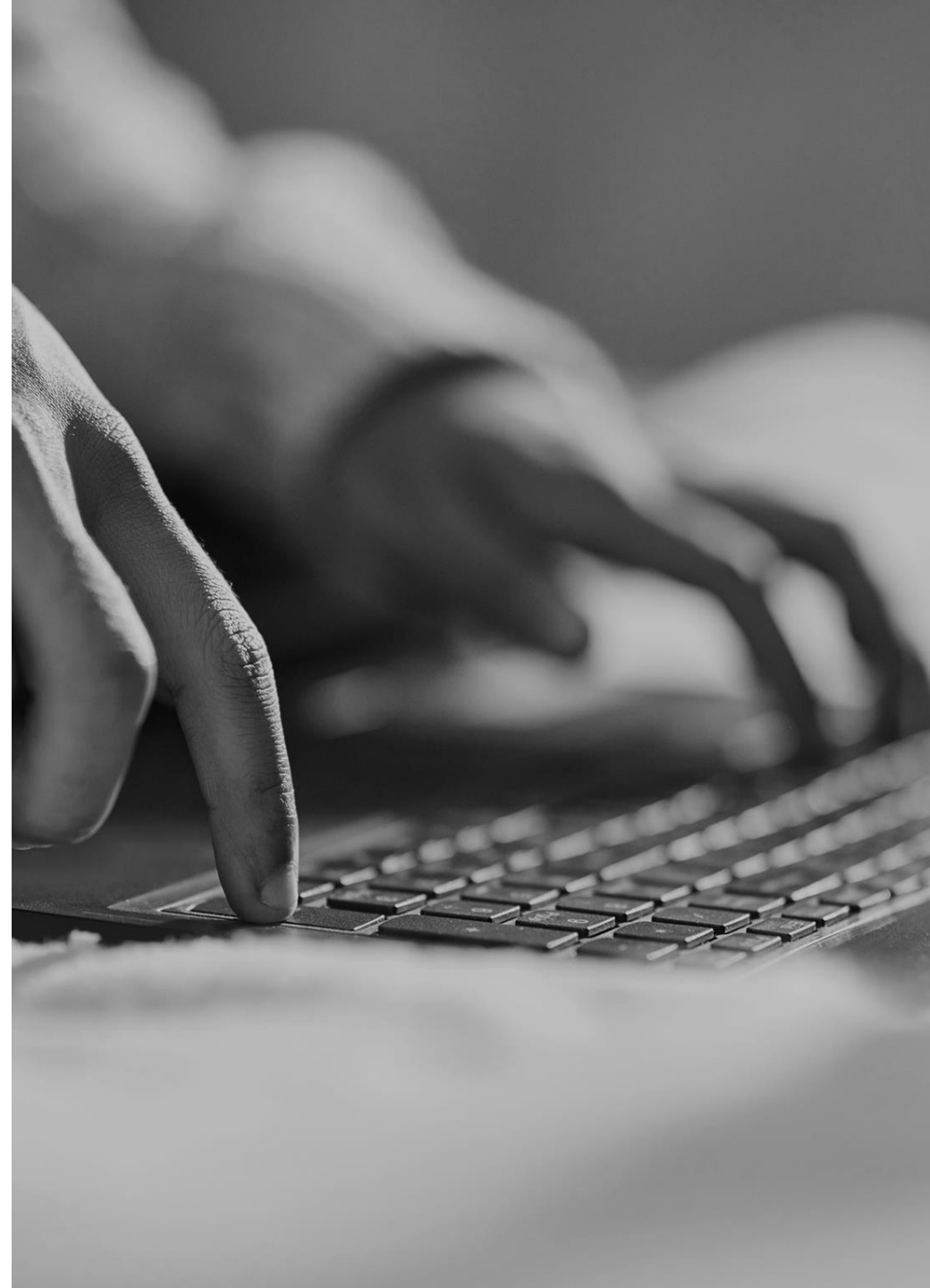
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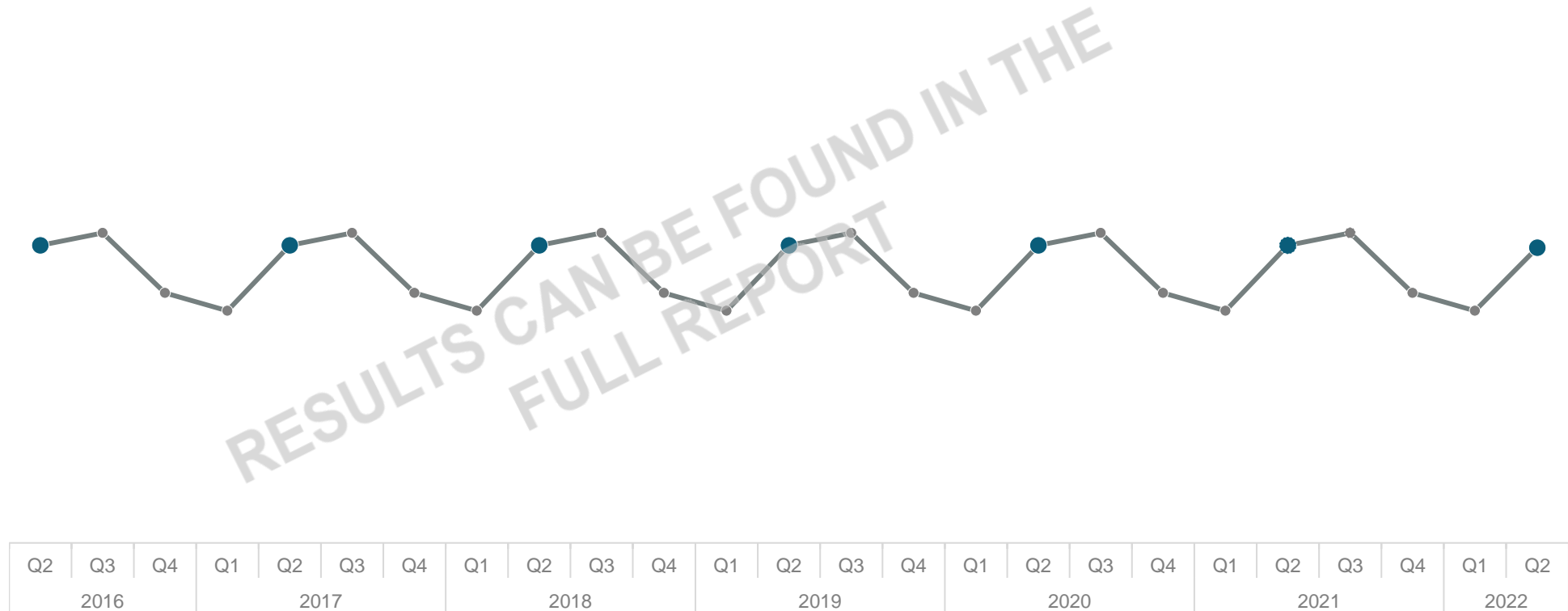
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## Share of households that have done a home improvement job\* – 2022 Q2



N = 6,600 interviews per quarter

\*Consumers who reported a change to their house (bathroom, kitchen, garden, living room, bedroom, attic, other rooms, exterior of the house, installations, or safety & security) in the last 3 months.

# European spending on home improvement

Total spending of European households on home improvement ... by ... in Q2 2022 compared to Q2 2021.

European spending on labour + material

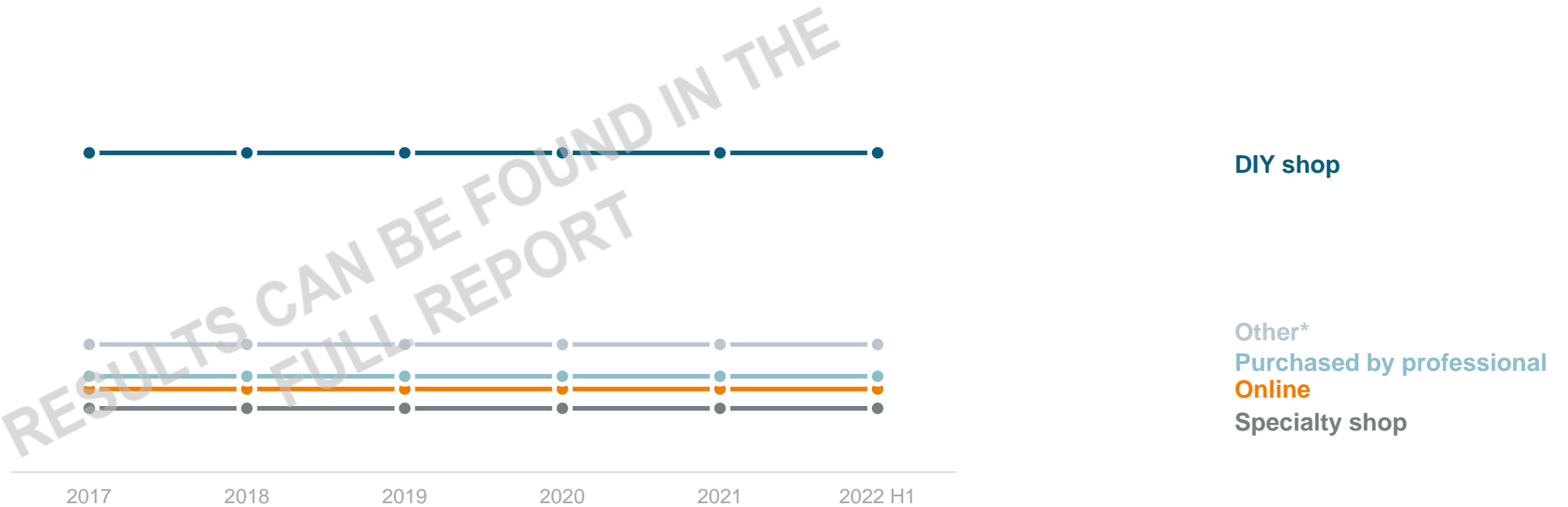


*\*Respondents who reported more than 10k (in euros) are excluded from the calculation.*



## Where did you buy the product?

[TREND]



\*Category "Other" includes: Furniture shop, Wholesaler and Other shops

Results in this chapter (EU averages) are weighted in order to account for population size. N=approx. 26,400 – total level per year, with around 100 product categories combined.

Each year we adjust product selection. The results presented across years are based on the same product category selection.

## Where did you buy the product?

[TREND]

Purchase channel	2017	2018	2019	2020	2021	2022 H1
DIY shop	x%	x%	x%	x%	x%	x%
Purchased by professional	x%	x%	x%	x%	x%	x%
Specialty shop	x%	x%	x%	x%	x%	x%
Online shop	x%	x%	x%	x%	x%	x%
Other*	x%	x%	x%	x%	x%	x%
Wholesaler for professional	x%	x%	x%	x%	x%	x%
Furniture store	x%	x%	x%	x%	x%	x%
Other shops	x%	x%	x%	x%	x%	x%

Results in this chapter (EU averages) are weighted in order to account for population size.

Number of observations approximately 80,200 – total level per year (107 products overall combined).

\*Category "Other" includes: Furniture shop, Wholesaler and Other shops

\*Lower/higher than last year

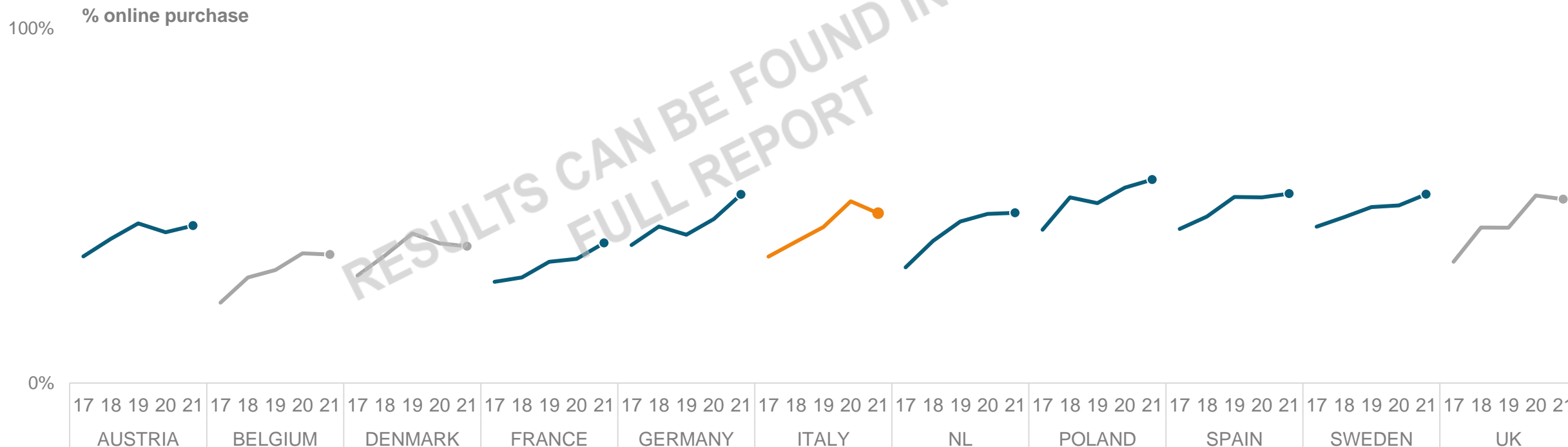
Results in this chapter (EU averages) are weighted in order to account for population size. N=approx. 26,400 – total level per year, with around 23 product categories combined.

Each year we adjust product selection. The results presented across years are based on the same product category selection.

# Online purchases have been ... in ..., ... and ....

Where did you buy the product?

[TREND PER COUNTRY]



Number of observations approximately 7,000 – per country per year between 2015-2021 and 1,200 for the first half of 2022, 107 products overall combined.

## Top-5 least/ most purchased home improvement products via online purchase channels

[2021]



	Type of products	% online buying
<b>MOST PURCHASED</b>	<b>PRODUCT</b>	<b>x%</b>
	Product	x%
	Product	x%
	Product	x%
	Product	x%
<b>LEAST PURCHASED</b>	Product	x%
	Product	x%
	Product	x%
	Product	x%
	<b>PRODUCT</b>	<b>x%</b>

## Where did you buy the product?

[2021]



Results in this chapter (EU averages) are weighted in order to account for population size.

Number of observations approximately 500,000 – total level (time frame 2014-2022 H1, 23 products overall combined)

\*Category "Other" includes: Furniture shop, Wholesaler and Other shops.

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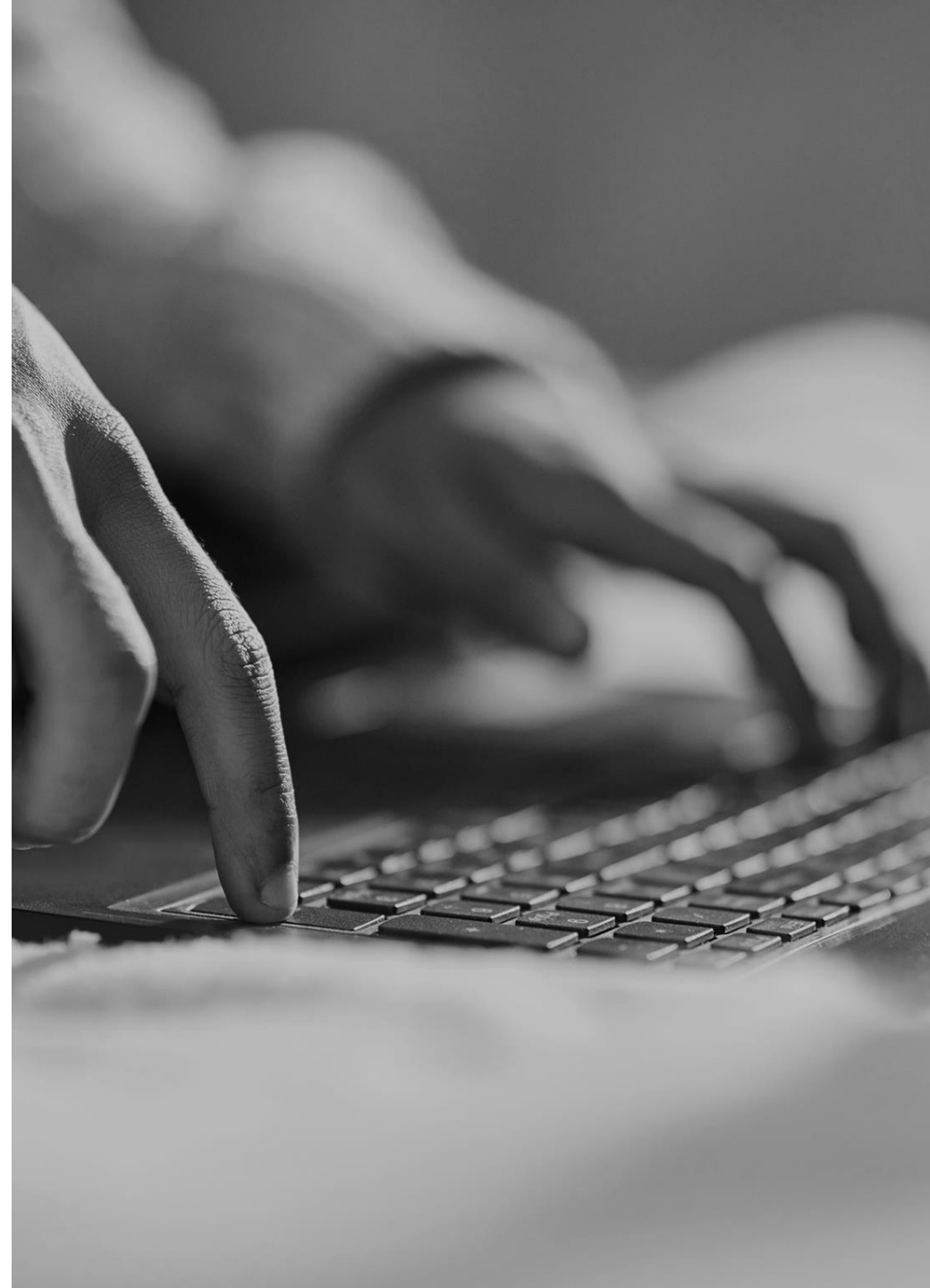
**THEME: THEME: PURCHASE CHANNELS**

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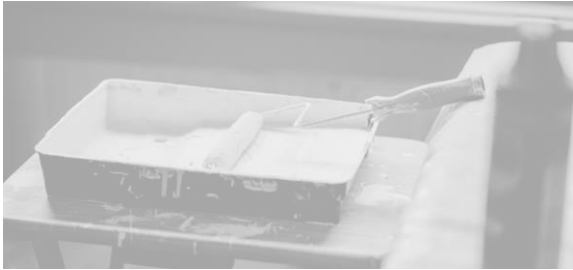
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## Theme questions

In this chapter, we take a deeper dive in the purchasing on home improvement products. The respondents were asked the following:



### Purchase channels:

- What **websites** come to mind first when thinking about **online purchasing** of home improvement products?
- What **website** would be the **second choice** when thinking about **online purchasing** of home improvement products?
- Have any **online purchases of home improvement products** been made in the last 12 months, and if yes, **where**?
- Have you purchased any products online via **Amazon** in the past 12 months?
- Have you purchased any products online via the number 1 national retailer in the past 12 months?
- Mapping out the **online leaders** in home improvement
- How **frequently** are consumers **using customer reviews** or ratings?
- How strong is the influence of these **customer reviews and ratings**?

... is the first top-of-mind website for three out of the four surveyed product group categories.

### Top of mind website

Q: What website comes to mind first when you think about online purchasing of:



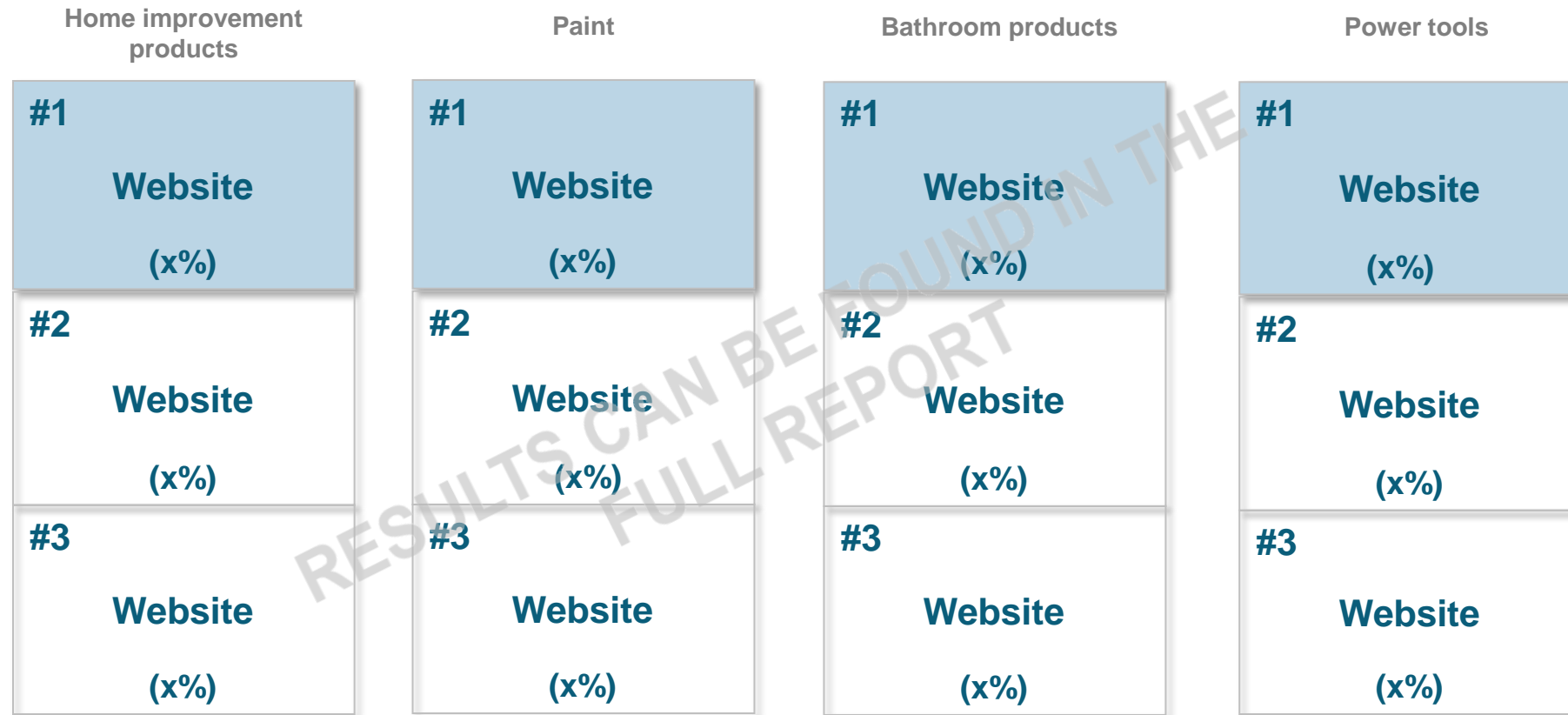
Base: n=6,617, all respondents



**Mostly ...** appear in both the second-choice and top-of-mind question, regardless of product categories.

**Website that comes to mind second**

Q: What website would be your second choice when you think about online purchasing of:

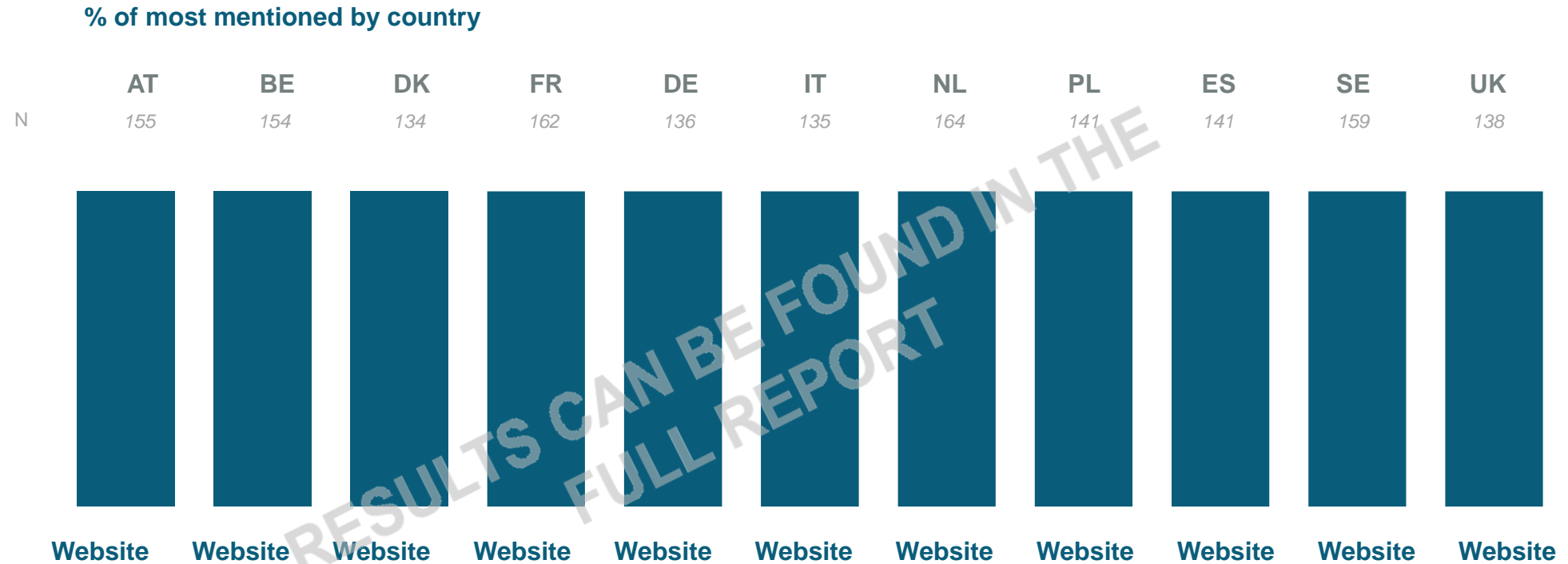


Base: n=6,617, all respondents

... is the most mentioned top-of-mind website for **home improvement products** in three surveyed countries.

### Top of mind website

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

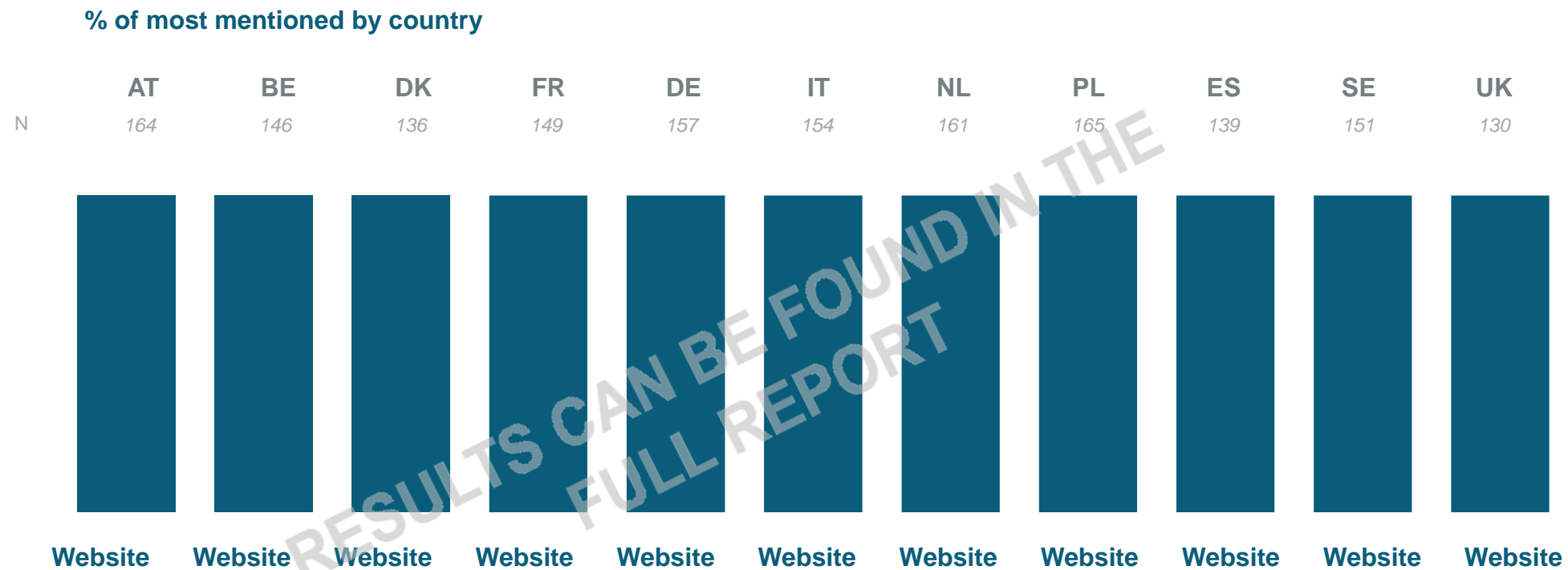


Base: n=1,619, all randomized per product category

... is the most mentioned top-of-mind website for **paint** in three surveyed countries.

### Top of mind website

Q: What website comes to mind first when you think about online purchasing of **paint**:



Base: n=1,652, all randomized per product category

Mostly ... appear as the top-of-mind country leaders for home improvement products, paint and the bathroom products category.

**Top of mind website**

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

**% of most mentioned by country**

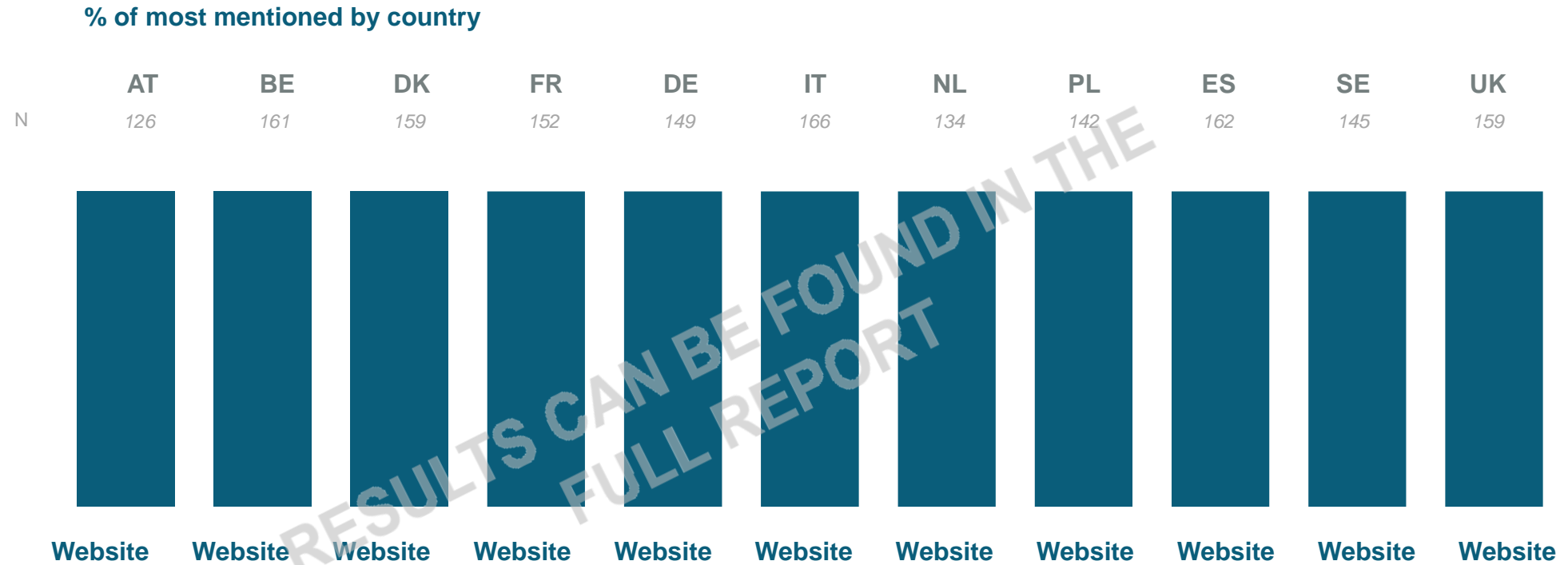


Base: n=1,675, all randomized per product category

... is the most mentioned top-of-mind website for **power tools** in five surveyed countries.

### Top of mind website

Q: What website comes to mind first when you think about online purchasing of **power tools**:



Base: n=1,655, all randomized per product category

# On a European level, the share of households which purchased via Amazon has ... since 2020.

## Purchases via Amazon

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

	2020	2022	Difference
Italy	x%	x%	x%
Germany	x%	x%	x%
Spain	x%	x%	x%
Austria	x%	x%	x%
United Kingdom	x%	x%	x%
France	x%	x%	x%
Belgium	x%	x%	x%
Netherlands	x%	x%	x%
Sweden	x%	x%	x%
Poland	x%	x%	x%
Denmark	x%	x%	x%

% of purchased  
via 

RESULTS CAN BE FOUND IN THE FULL REPORT

Compared to 2020, ... and the ... **age group** are the two groups where the ... in the share of households that made purchases via Amazon is most noticeable.

### Purchases via Amazon

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

**% of purchased via amazon**

	2020	2022	Difference
<b>No experience</b>	x%	x%	x%
<b>Decorator</b>	x%	x%	x%
<b>Light DIY-er</b>	x%	x%	x%
<b>Renovator</b>	x%	x%	x%
<b>18-34</b>	x%	x%	x%
<b>35-54</b>	x%	x%	x%
<b>55+</b>	x%	x%	x%

RESULTS CAN BE FOUND IN THE FULL REPORT

On a European level, the share of households that made purchases of home improvement products via Amazon has ... **since 2020.**

**Home improvement purchases via Amazon**

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

**% of purchased via amazon**

	2020	2022	Difference
Spain	x%	x%	x%
Italy	x%	x%	x%
United Kingdom	x%	x%	x%
Poland	x%	x%	x%
Germany	x%	x%	x%
Austria	x%	x%	x%
Sweden	x%	x%	x%
France	x%	x%	x%
Netherlands	x%	x%	x%
Belgium	x%	x%	x%
Denmark	x%	x%	x%

RESULTS CAN BE FOUND IN THE FULL REPORT

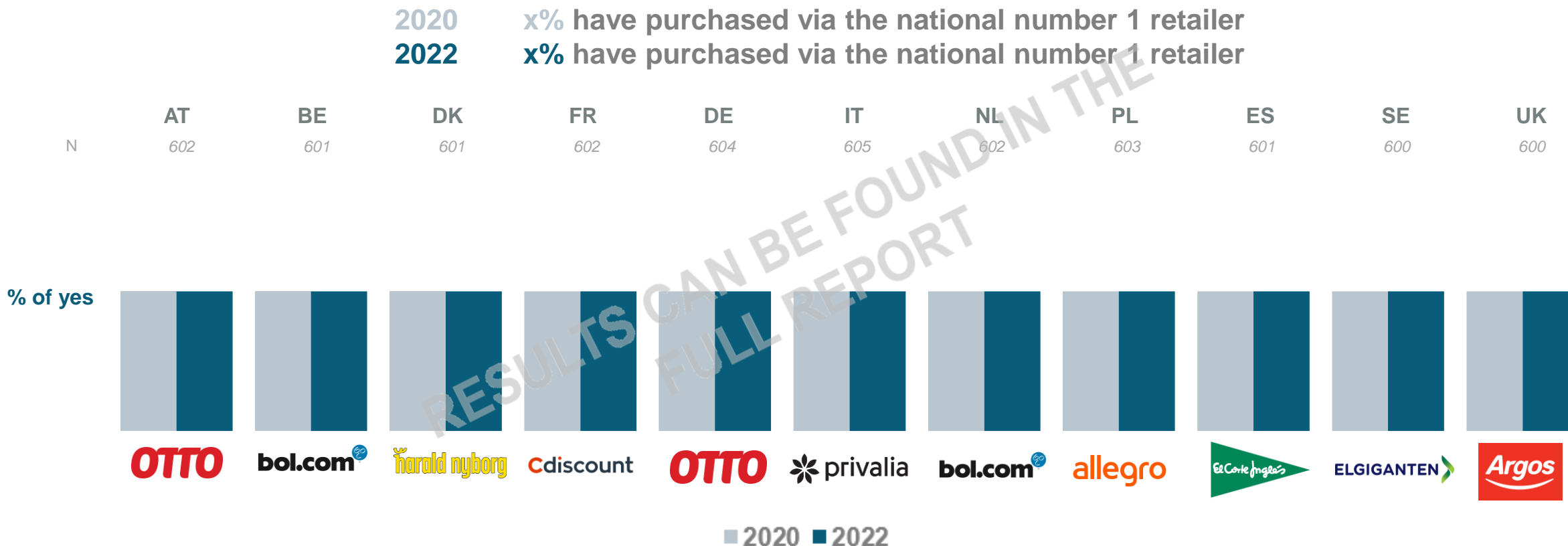
Base: n=3,572, if purchased via Amazon



# Compared to 2020, the share of households that made purchases via the national number one retailer ..., except for ..., where it ...

## Purchasing via national number one retailer

Q: Have you purchased any products via national number one retailer in the past 12 months?



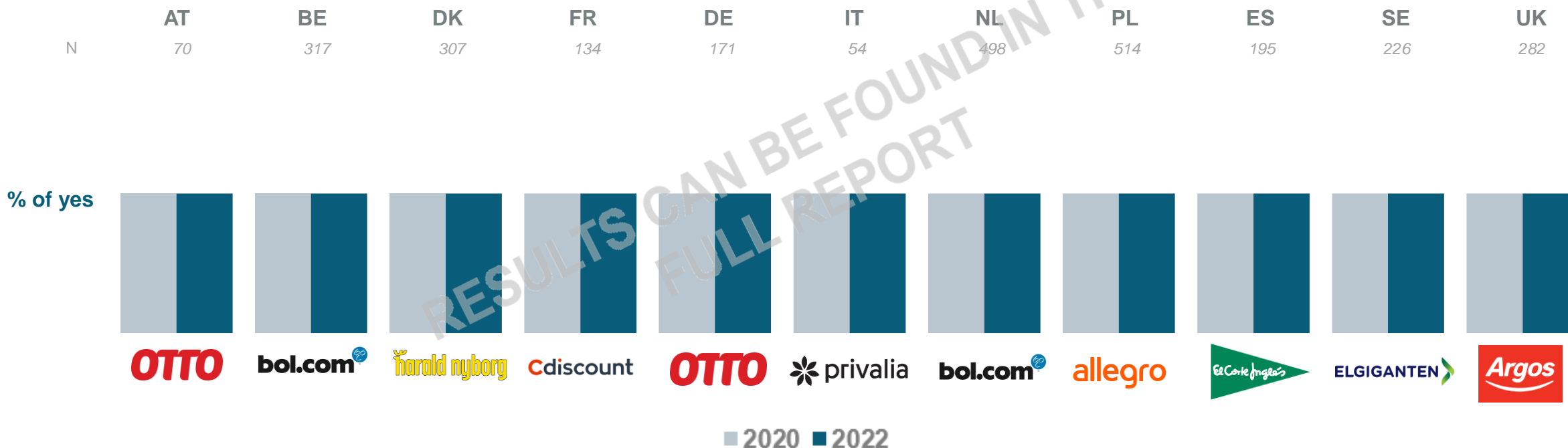
Base: n=6,621, all respondents

# On a European level, compared to 2020, the share of households that made purchases of home improvement products via the national No. 1 etailer ...

## Home improvement purchasing via national number one retailer

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

**2020** X% purchased a home improvement product via the national number 1 retailer  
**2022** X% purchased a home improvement product via the national number 1 retailer



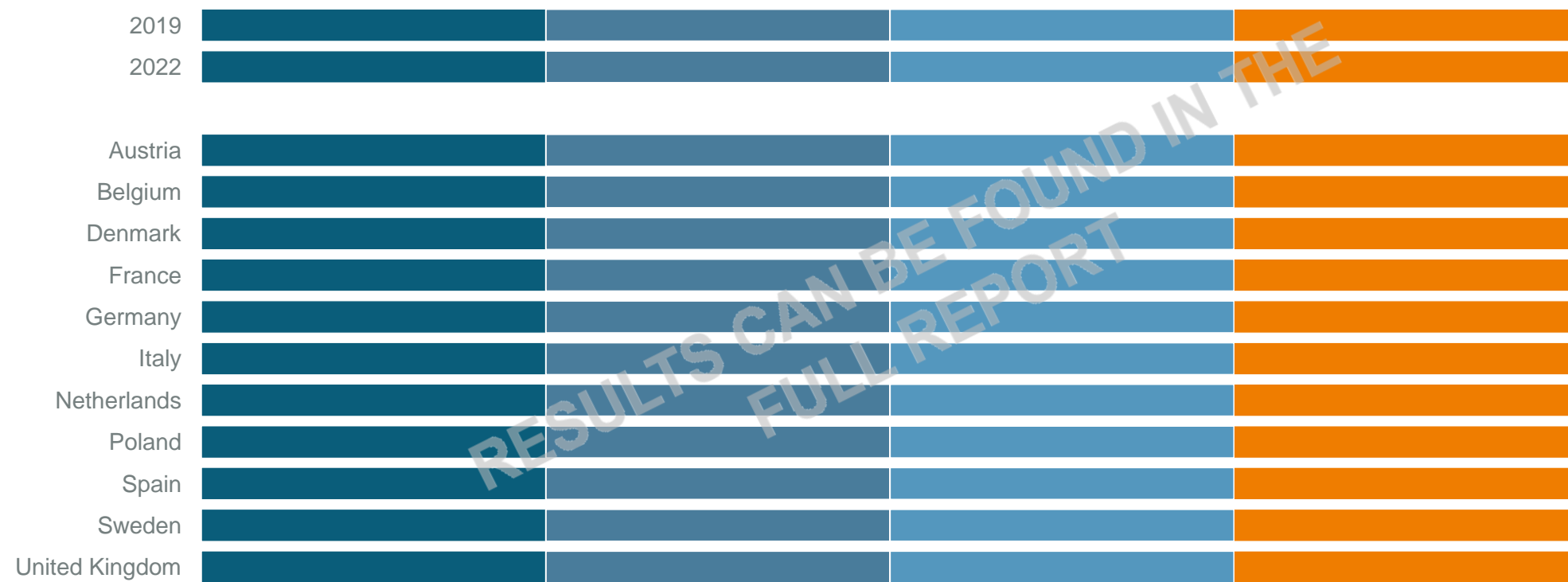
Base: n=2,768, if purchased via national number one retailer

On a European level, there is a ... in the frequency of using customer reviews or ratings when purchasing home improvement products.

### Customer reviews and rating

Q: When purchasing home improvement products online, how frequently are you using customer reviews or ratings?

At every purchase | Sometimes | Rarely | Never



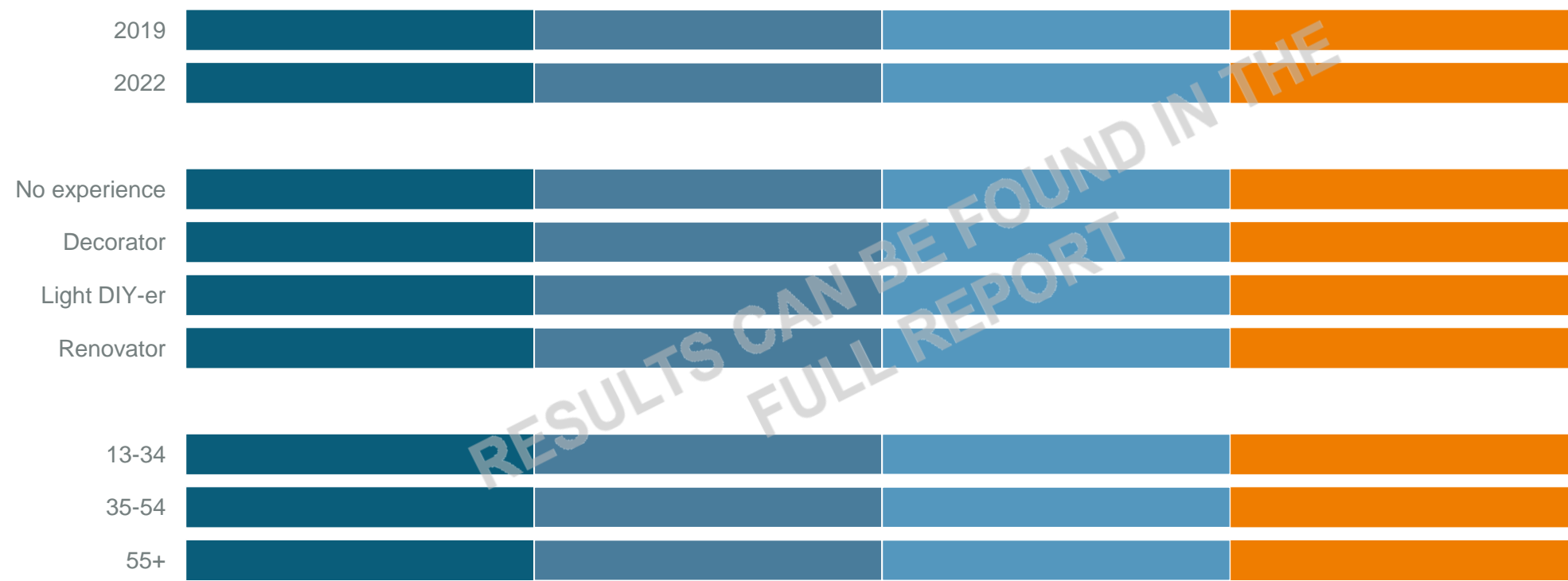
Base: n=6,617, all respondents

# Those with ..., as well as the ... generations, use customer reviews and ratings ... frequently.

## Customer reviews and rating

Q: When purchasing home improvement products online, how frequently are you using customer reviews or ratings?

At every purchase | Sometimes | Rarely | Never

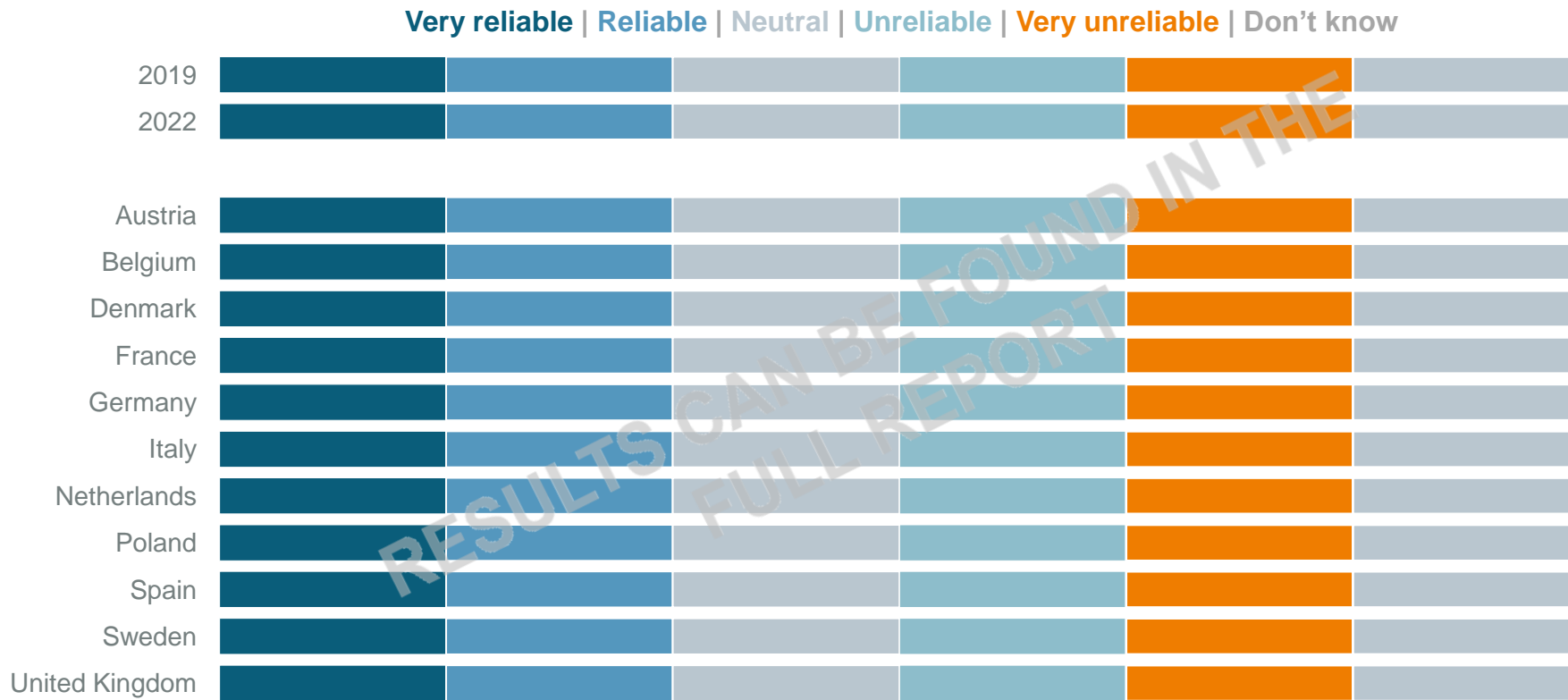


Base: n=6,617, all respondents

# The perception of the reliability of customer reviews and ratings on **Google** ....

## Customer review reliability

Q: what extent do you think customer reviews and ratings are reliable at **Google**?

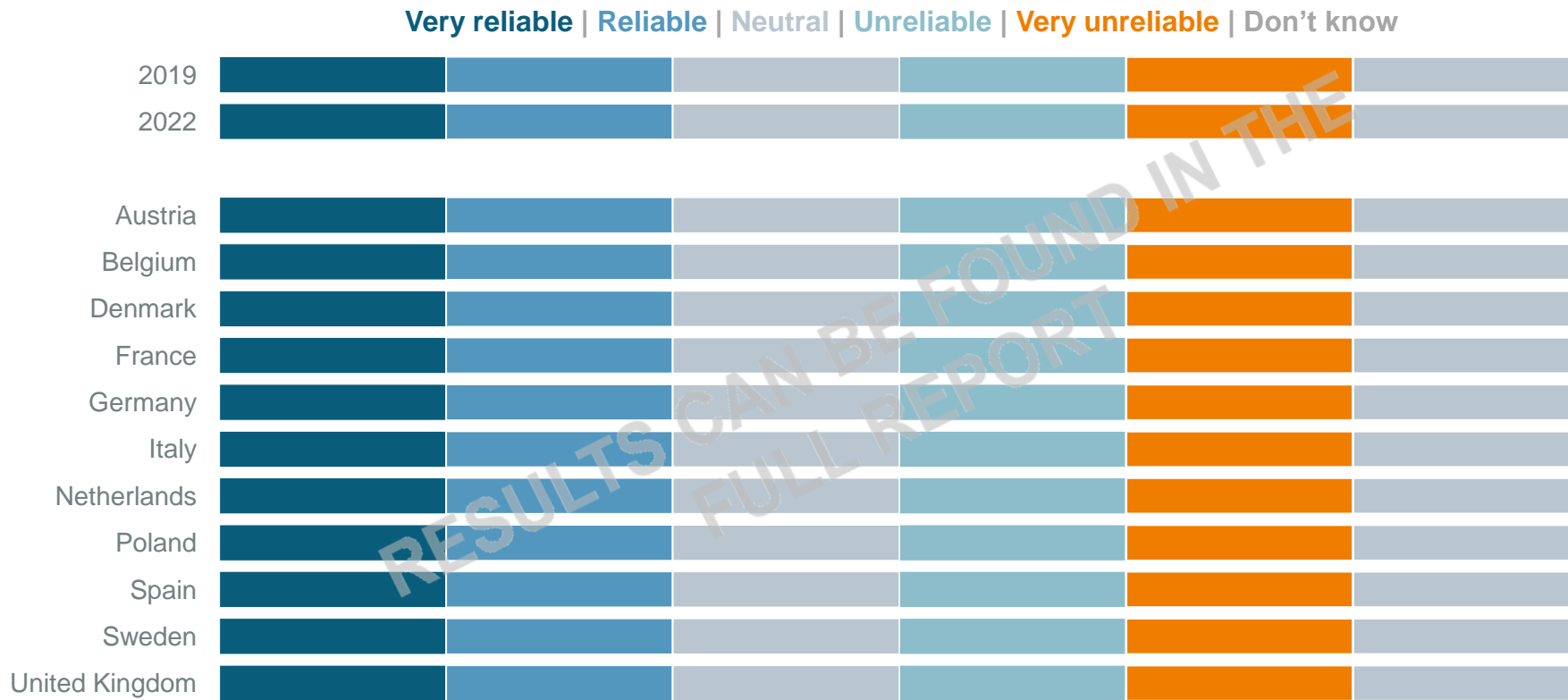


Base: n=5,773, if bought home improvement products online

# There is a slight ... in the perception of the reliability of customer reviews and ratings at **Amazon**.

## Customer review reliability

Q: what extent do you think customer reviews and ratings are reliable at **Amazon**?

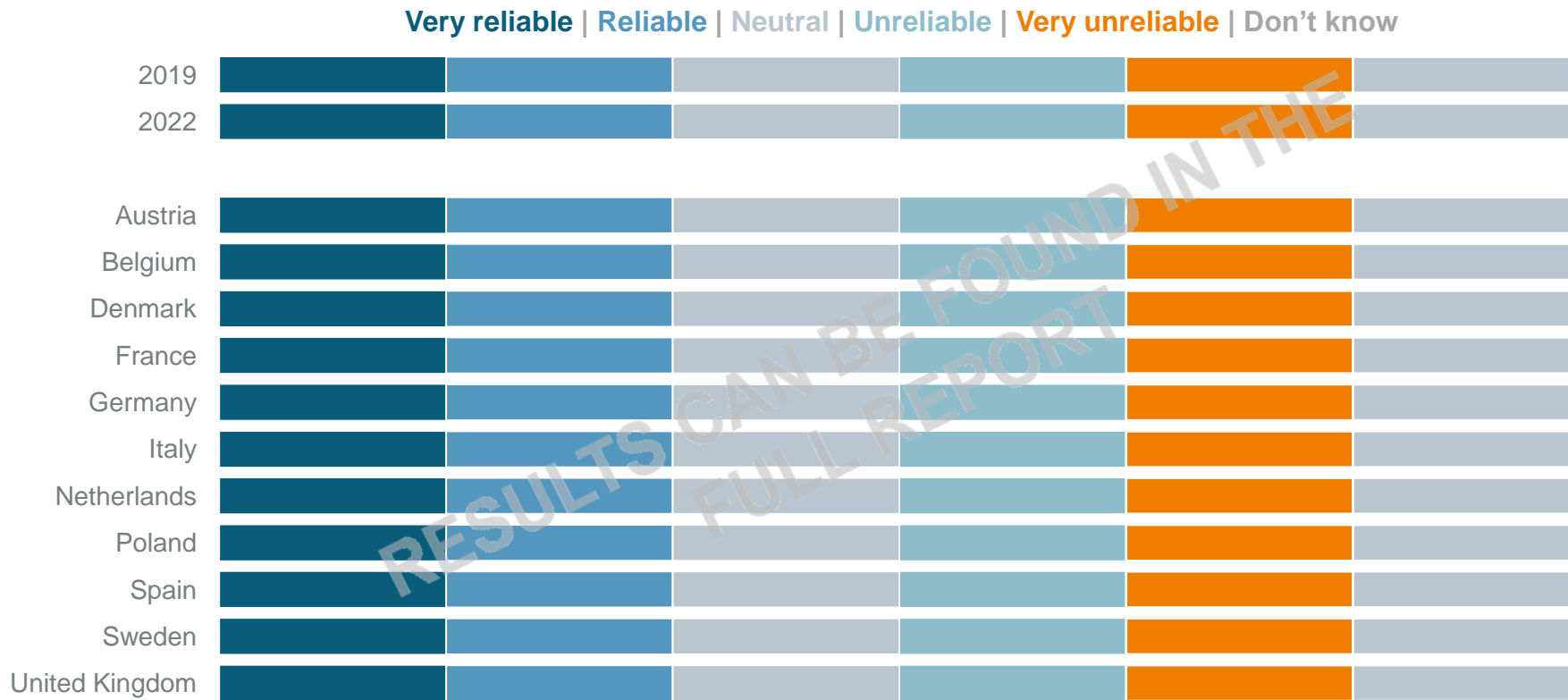


Base: n=5,773, if bought home improvement products online

# There is a slight ... in the perception of the reliability of customer reviews and ratings at **the national number one retailer**.

## Customer review reliability

Q: what extent do you think customer reviews and ratings are reliable at **National number one retailer**?



Base: n=5,773, if bought home improvement products online

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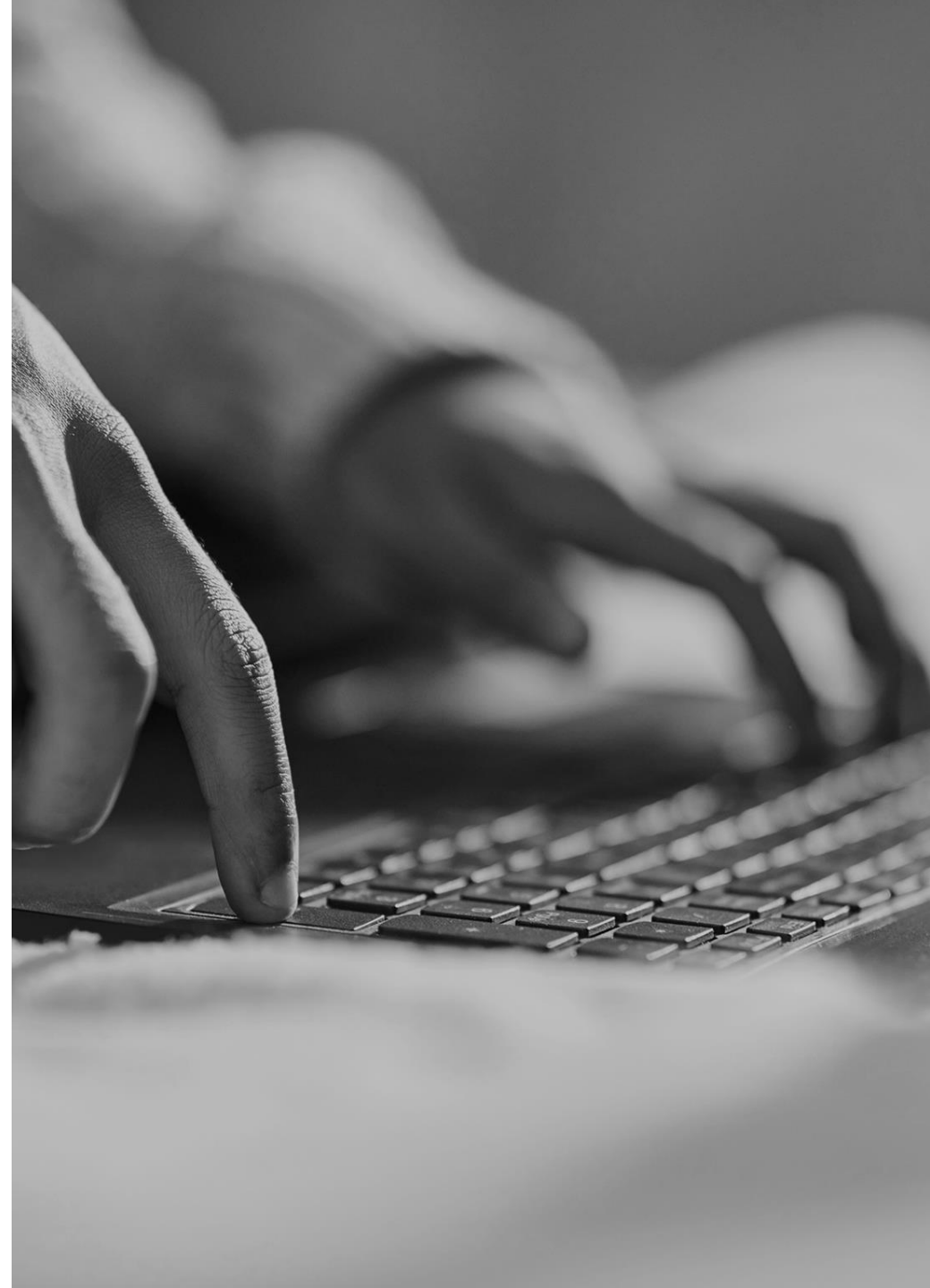
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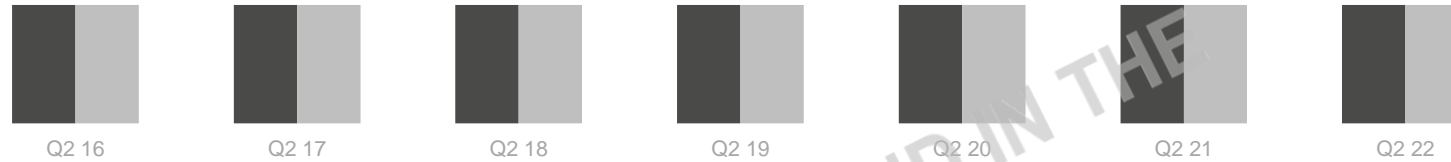




# AUSTRIA

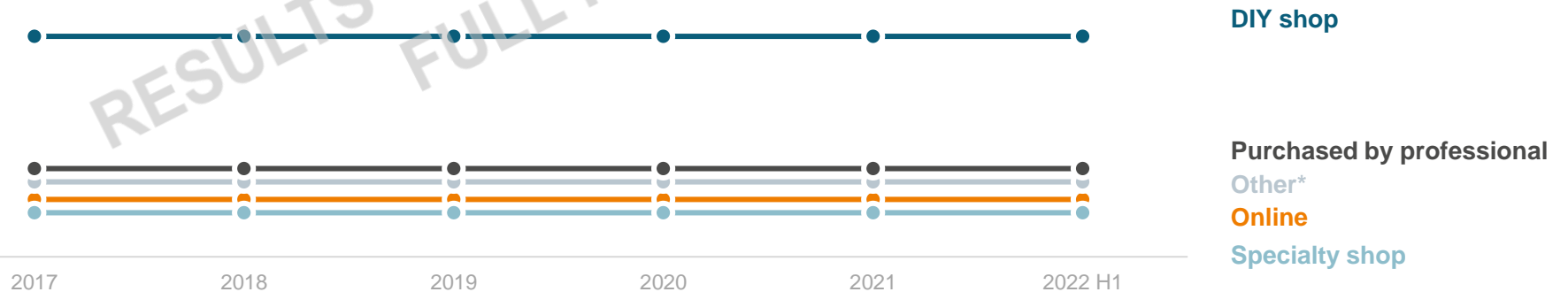
## Share of households that did a home improvement job

AUSTRIA  
EU AVERAGE



Base: n=600 per quarter

## Where did you buy the product?

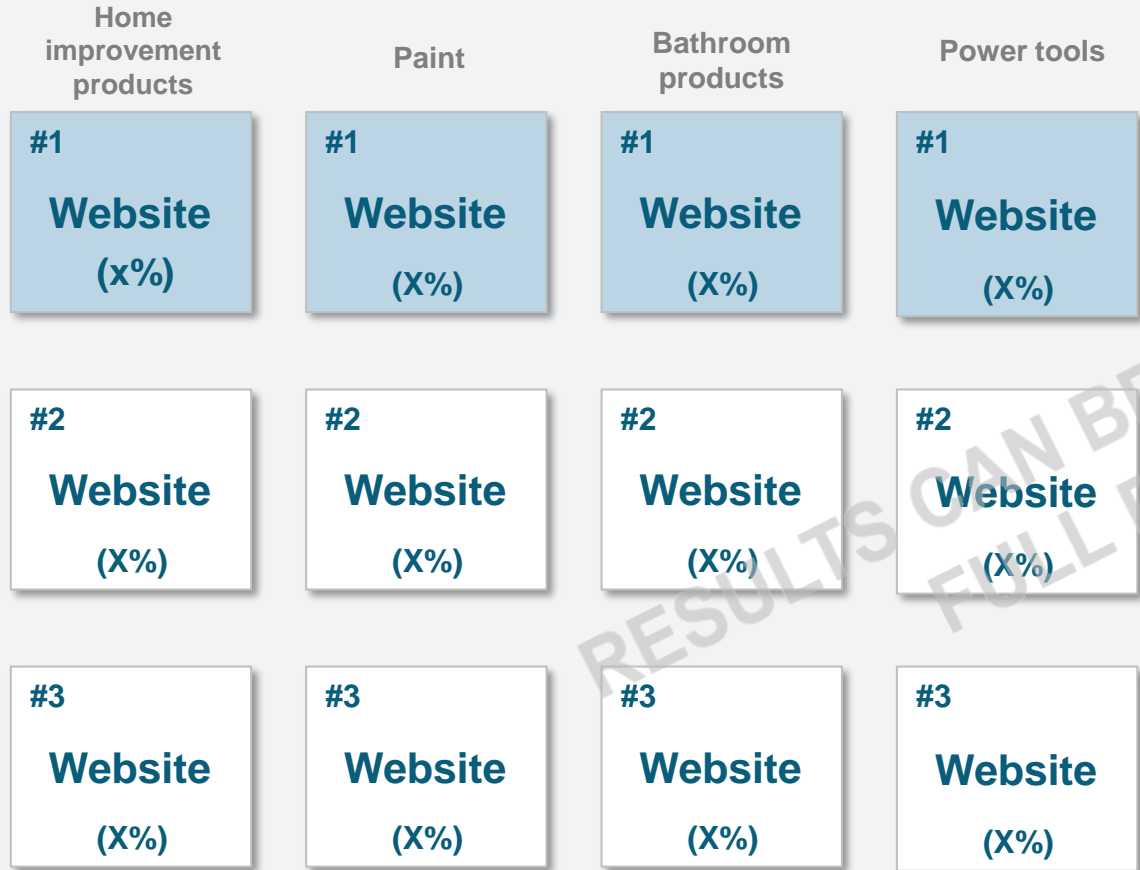


\*Category "Other" includes: Furniture shop, Garden centre, Wholesaler and Other shops

# AUSTRIA

## Top of mind website

Q: What website comes to mind first when you think about online purchasing of:



## Purchasing via Amazon

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

### Purchased via in the past 12 months?

2020	2022
X%	X%

## Purchasing via national number one retailer

Q: Have you purchased any products via national number one retailer in the past 12 months?

2020

X% have purchased via the national number 1 retailer

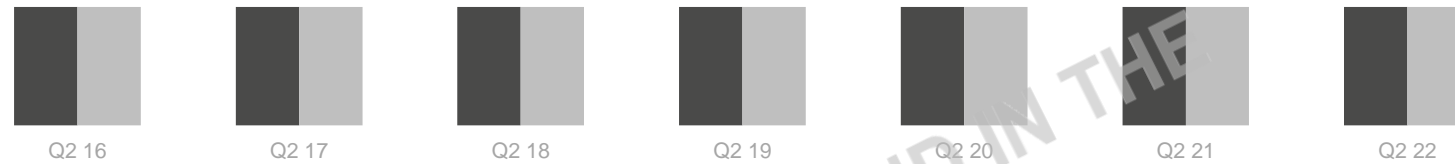
2022

X% have purchased via the national number 1 retailer

# BELGIUM

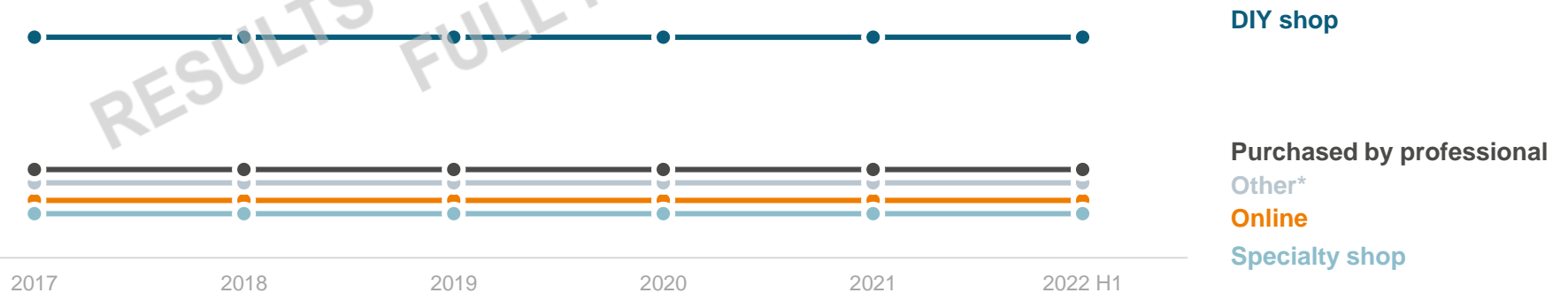
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AUSTRIA  
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Base: n=600 per quarter

## Where did you buy the product?

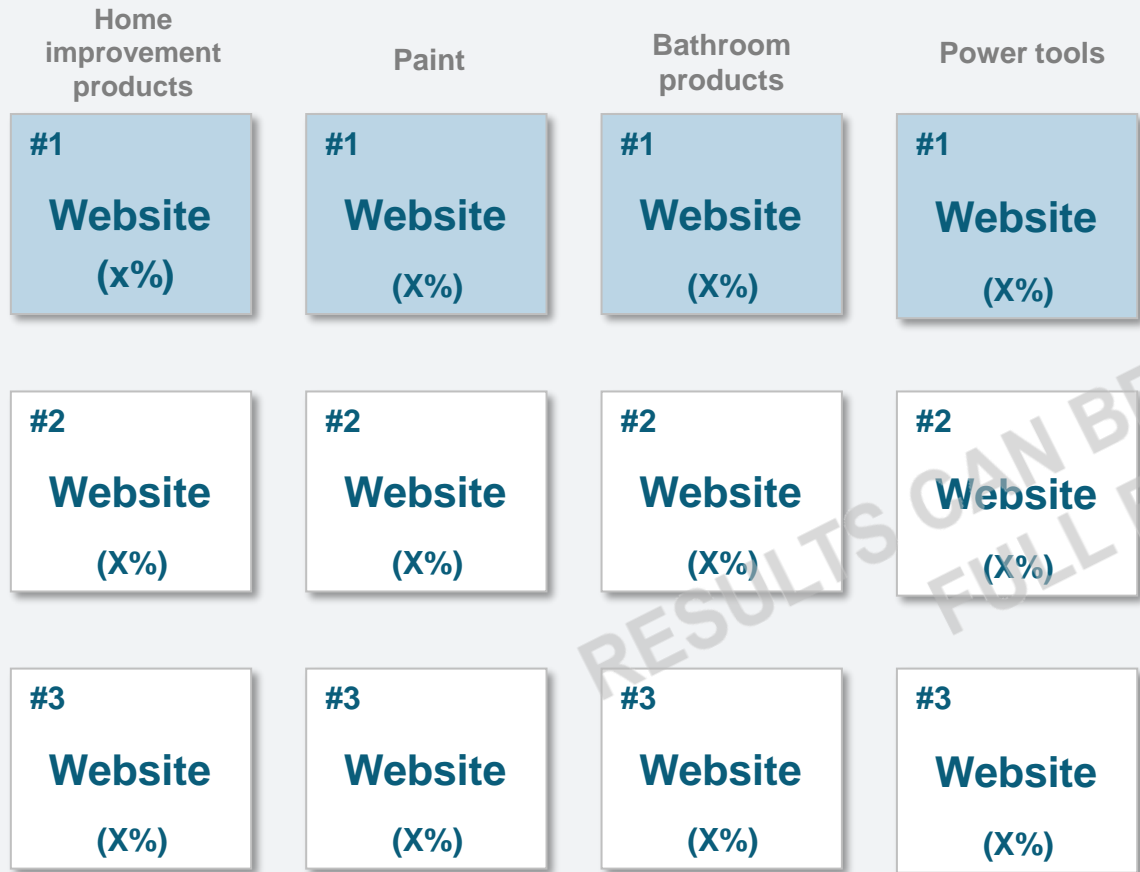


\*Category "Other" includes: Furniture shop, Garden centre, Wholesaler and Other shops

# BELGIUM

## Top of mind website

Q: What website comes to mind first when you think about online purchasing of:



## Purchasing via Amazon

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

### Purchased via in the past 12 months?

2020	2022
X%	X%

## Purchasing via national number one retailer

Q: Have you purchased any products via national number one retailer in the past 12 months?

2020

X% have purchased via the national number 1 retailer

2022

X% have purchased via the national number 1 retailer

# DENMARK

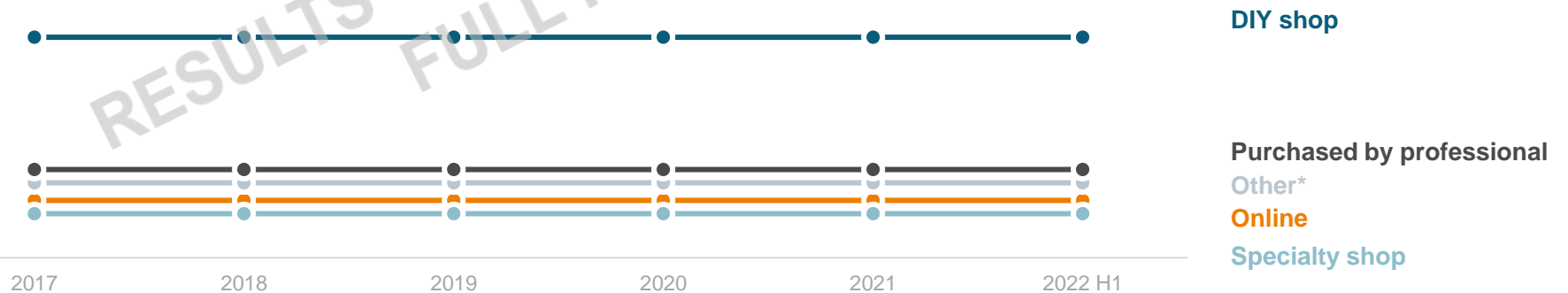
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**AUSTRIA**  
EU AVERAGE



Base: n=600 per quarter

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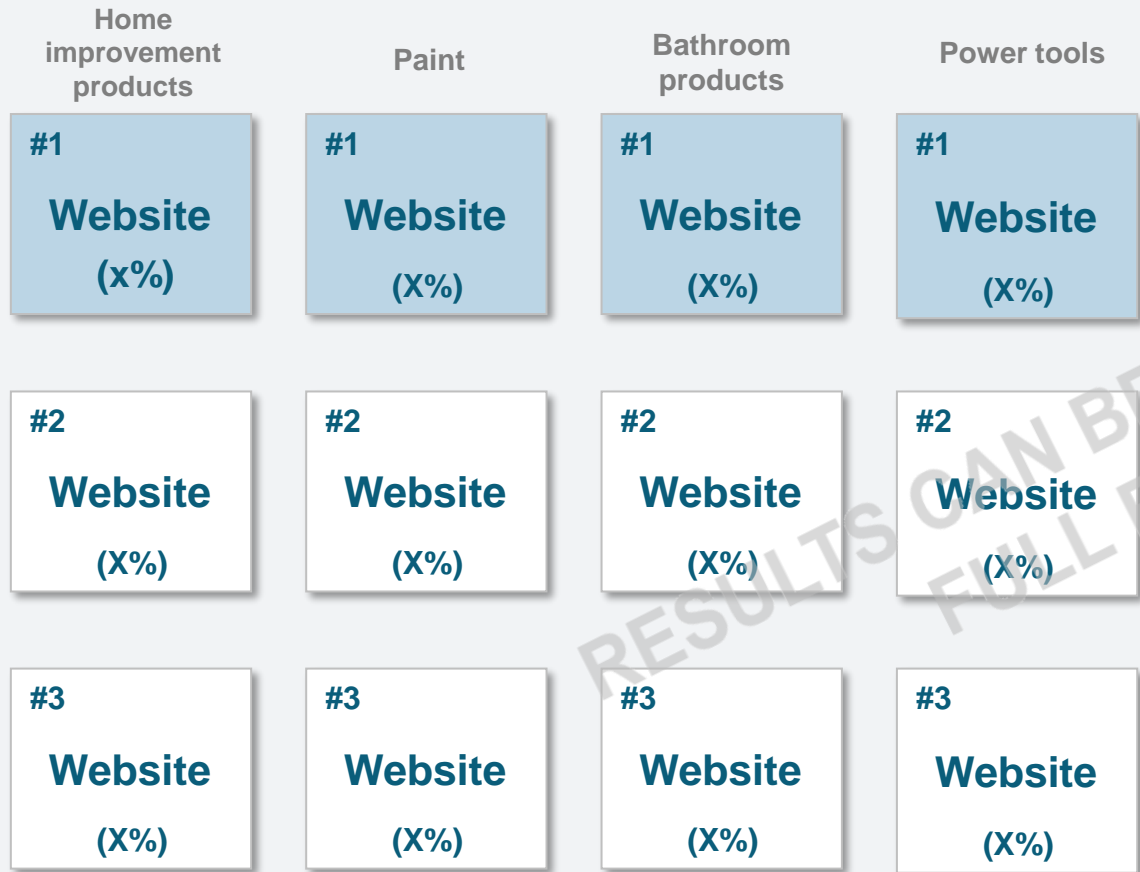


\*Category "Other" includes: Furniture shop, Garden centre, Wholesaler and Other shops

# DENMARK

## Top of mind website

Q: What website comes to mind first when you think about online purchasing of:



## Purchasing via Amazon

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

### Purchased via in the past 12 months?

2020	2022
X%	X%

## Purchasing via national number one retailer

Q: Have you purchased any products via national number one retailer in the past 12 months?

2020

X% have purchased via the national number 1 retailer

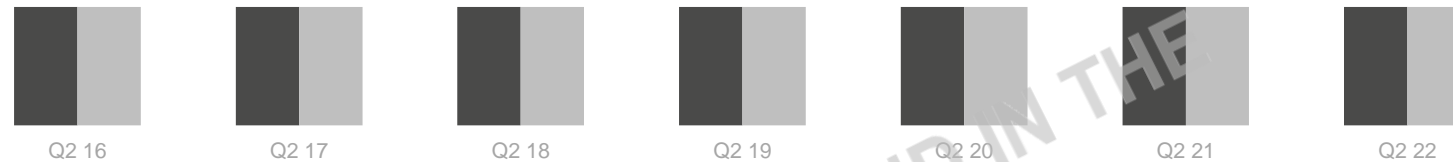
2022

X% have purchased via the national number 1 retailer

# FINLAND

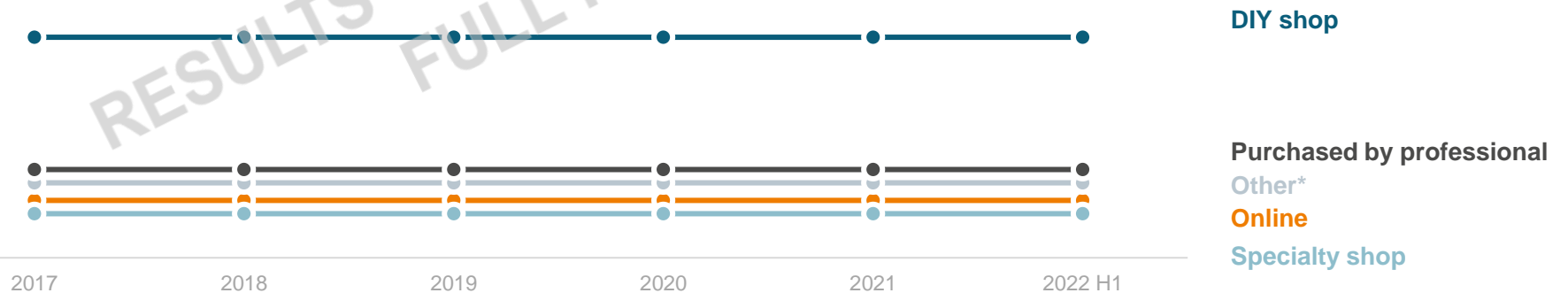
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EU AVERAGE



Base: n=600 per quarter

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\*Category "Other" includes: Furniture shop, Garden centre, Wholesaler and Other shops

# FINLAND

## Top of mind website

Q: What website comes to mind first when you think about online purchasing of:



## Purchasing via Amazon

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

### Purchased via in the past 12 months?

2020	2022
X%	X%

## Purchasing via national number one retailer

Q: Have you purchased any products via national number one retailer in the past 12 months?

2020

X% have purchased via the national number 1 retailer

2022

X% have purchased via the national number 1 retailer



# FRANCE

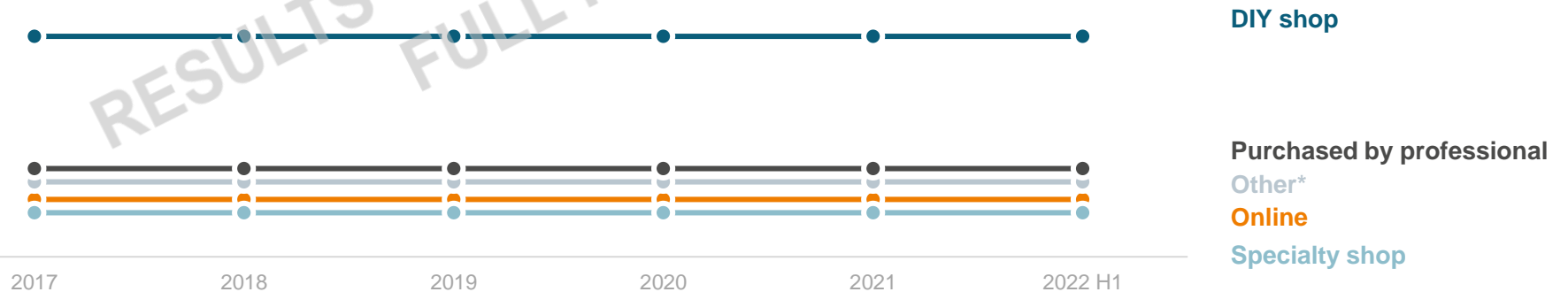
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EU AVERAGE



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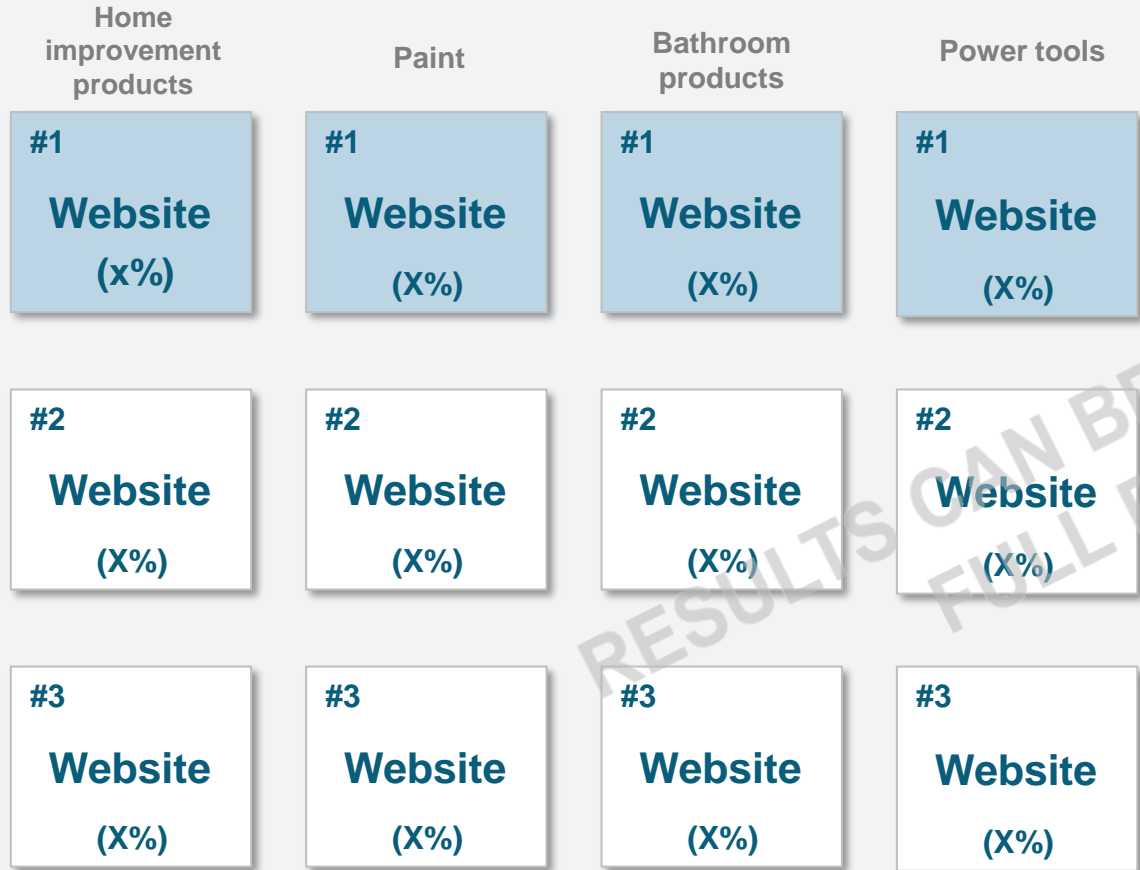


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# FRANCE

## Top of mind website

Q: What website comes to mind first when you think about online purchasing of:



## Purchasing via Amazon

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

### Purchased via in the past 12 months?

2020	2022
X%	X%

## Purchasing via national number one retailer

Q: Have you purchased any products via national number one retailer in the past 12 months?

2020

X% have purchased via the national number 1 retailer

2022

X% have purchased via the national number 1 retailer

# GERMANY

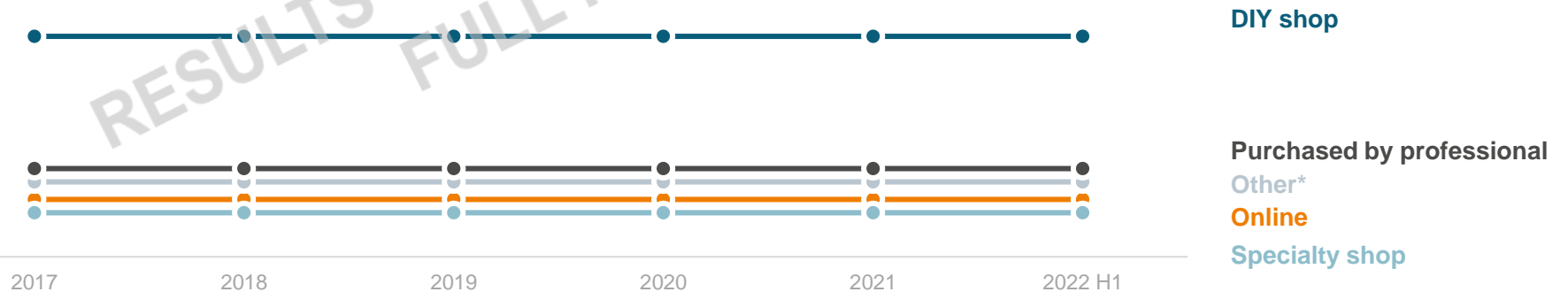
## Share of households that did a home improvement job

AUSTRIA  
EU AVERAGE



Base: n=600 per quarter

## Where did you buy the product?

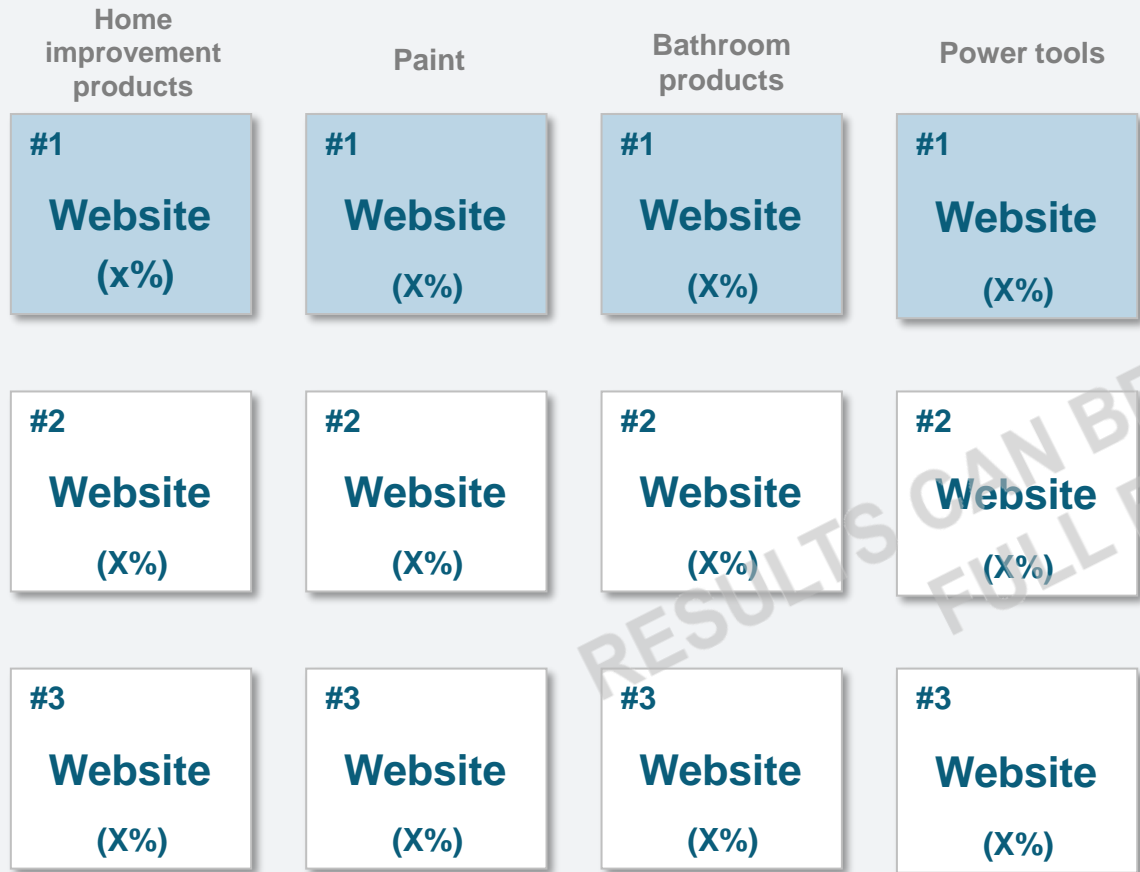


\*Category "Other" includes: Furniture shop, Garden centre, Wholesaler and Other shops

# GERMANY

## Top of mind website

Q: What website comes to mind first when you think about online purchasing of:



## Purchasing via Amazon

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

### Purchased via in the past 12 months?

2020	2022
X%	X%

## Purchasing via national number one retailer

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# NETHERLANDS

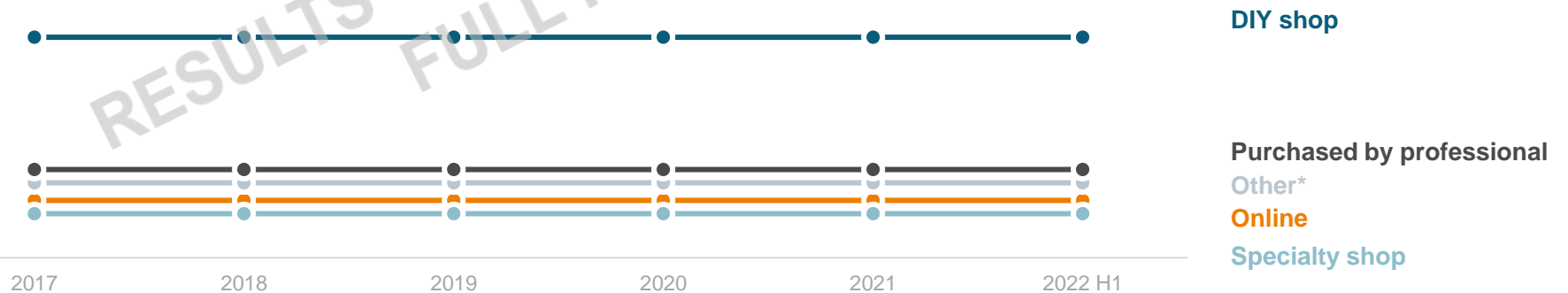
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Base: n=600 per quarter

## Where did you buy the product?

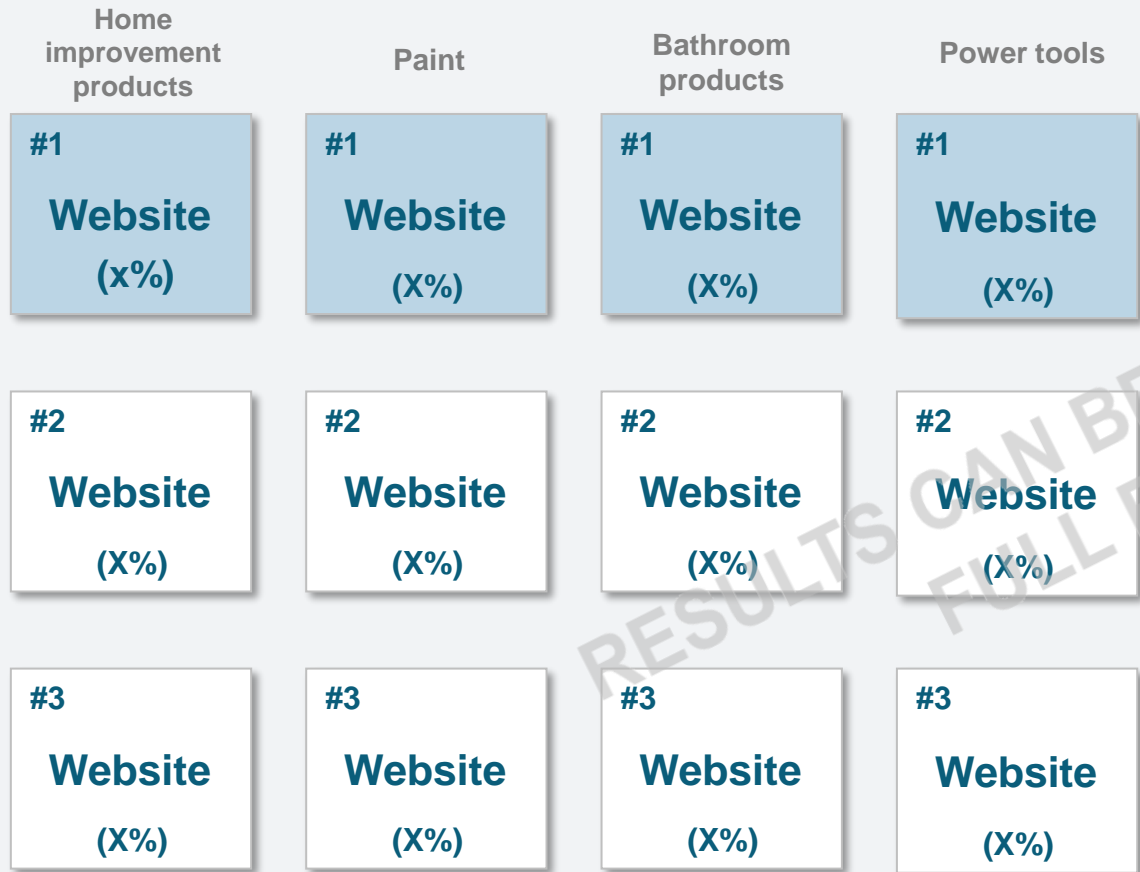


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Q: Have you purchased any products online via Amazon in the past 12 months?

### Purchased via in the past 12 months?

2020	2022
X%	X%

## Purchasing via national number one retailer

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2022

X% have purchased via the national number 1 retailer

# NORWAY

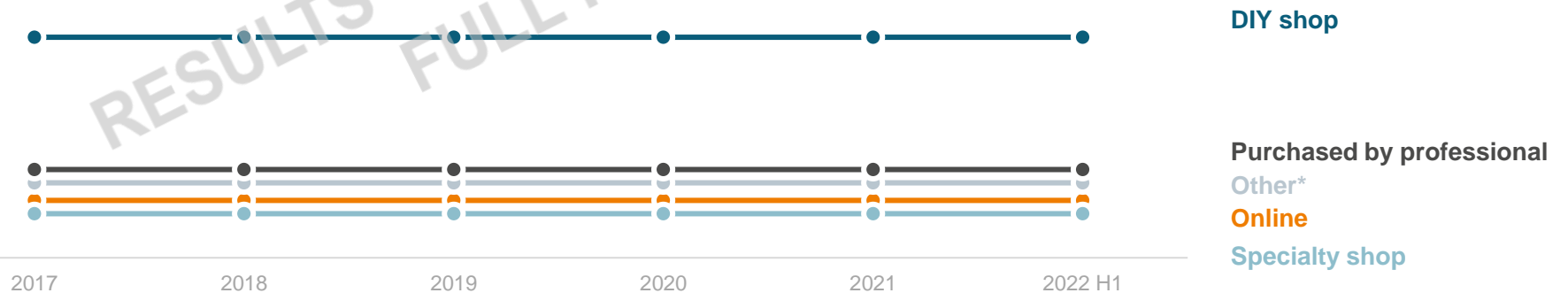
## Share of households that did a home improvement job

**AUSTRIA**  
EU AVERAGE



Base: n=600 per quarter

## Where did you buy the product?

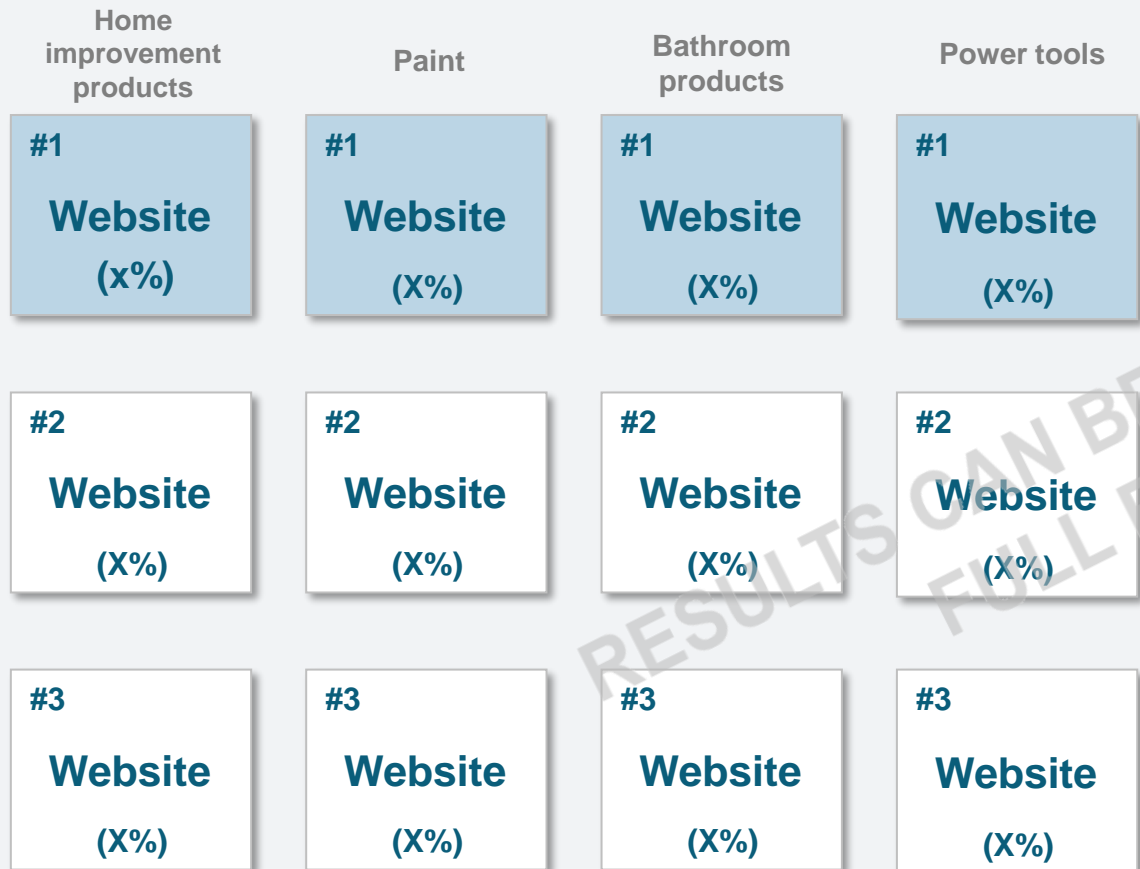


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# NORWAY

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## Purchasing via Amazon

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

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2020	2022
X%	X%

## Purchasing via national number one retailer

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X% have purchased via the national number 1 retailer



# SPAIN

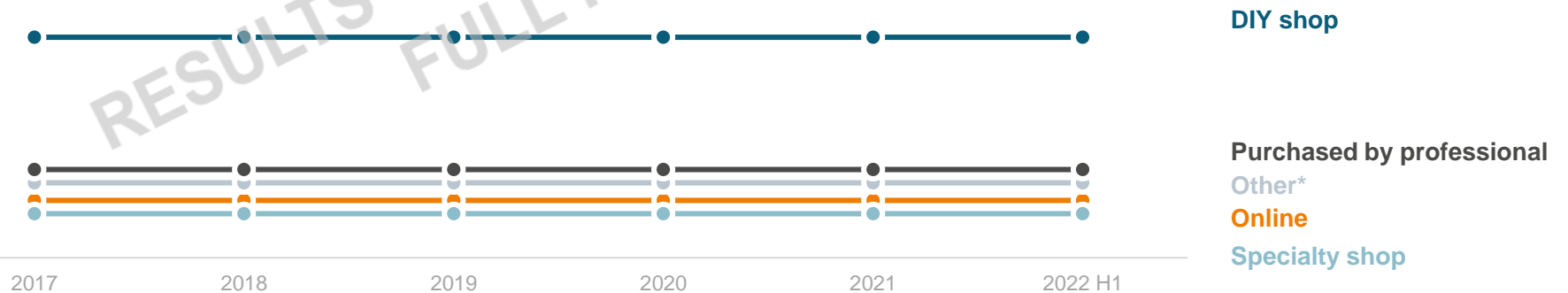
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Base: n=600 per quarter

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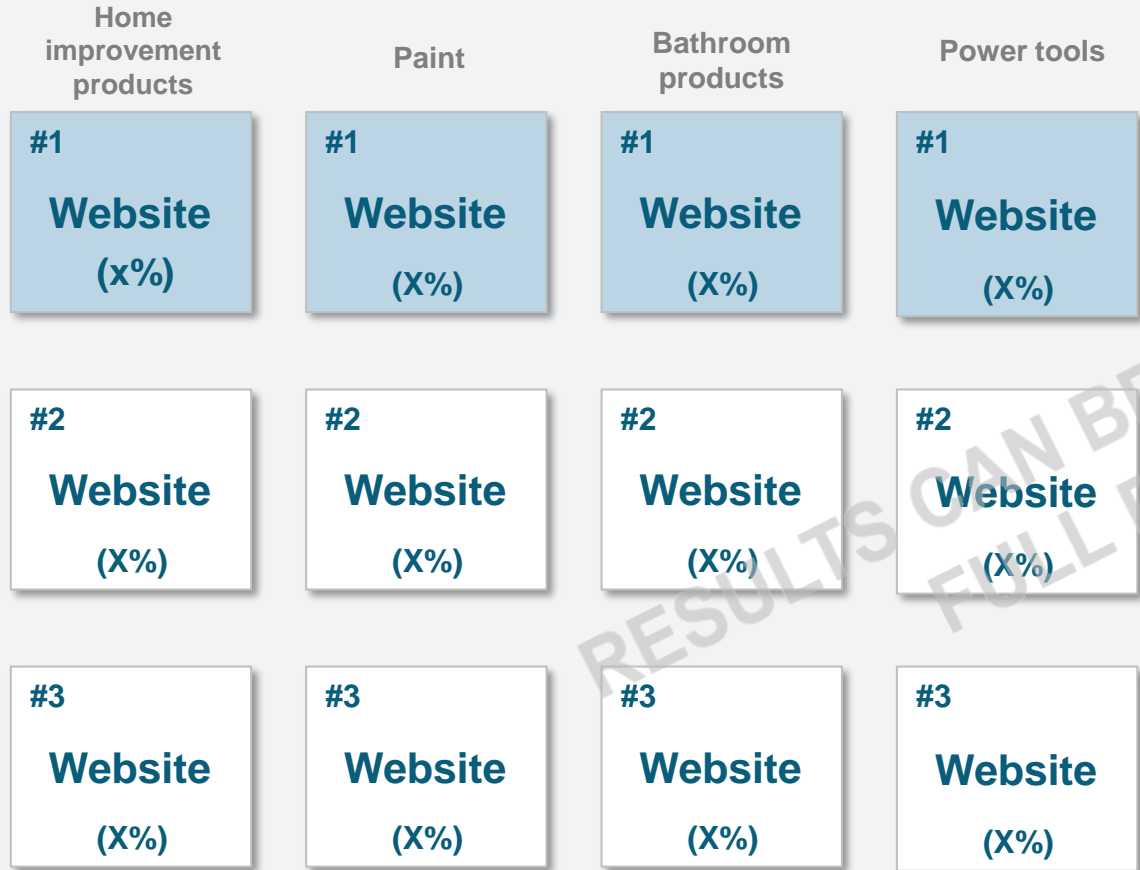


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2020	2022
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X% have purchased via the national number 1 retailer

# SWEDEN

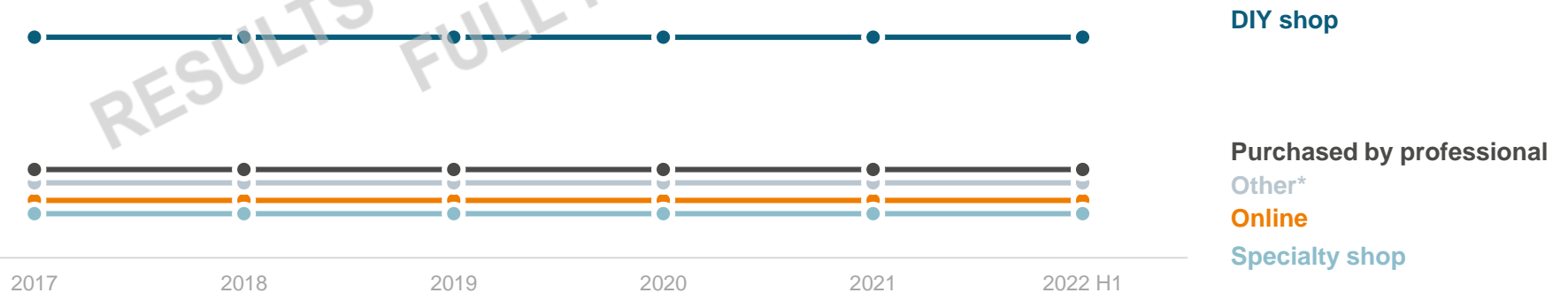
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AUSTRIA  
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Base: n=600 per quarter

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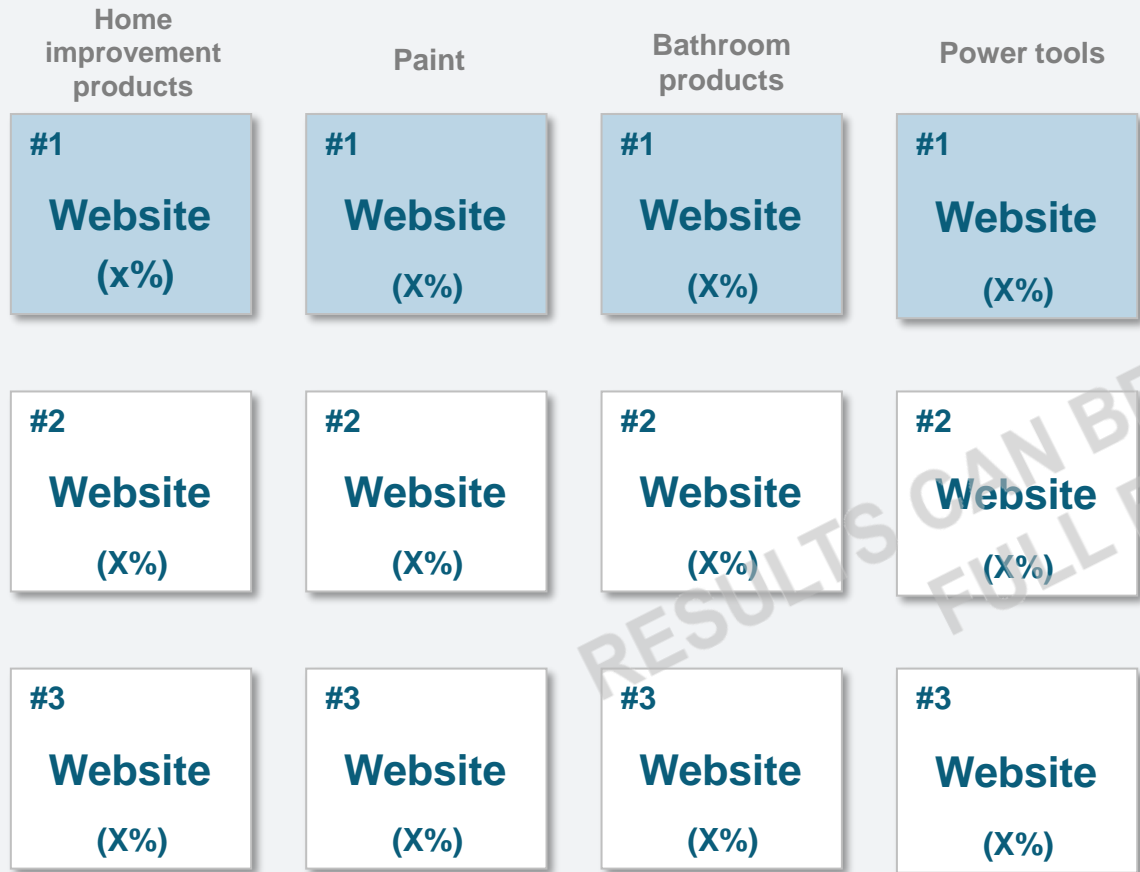


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# SWEDEN

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## Purchasing via Amazon

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### Purchased via in the past 12 months?

2020	2022
X%	X%

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2020

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UK

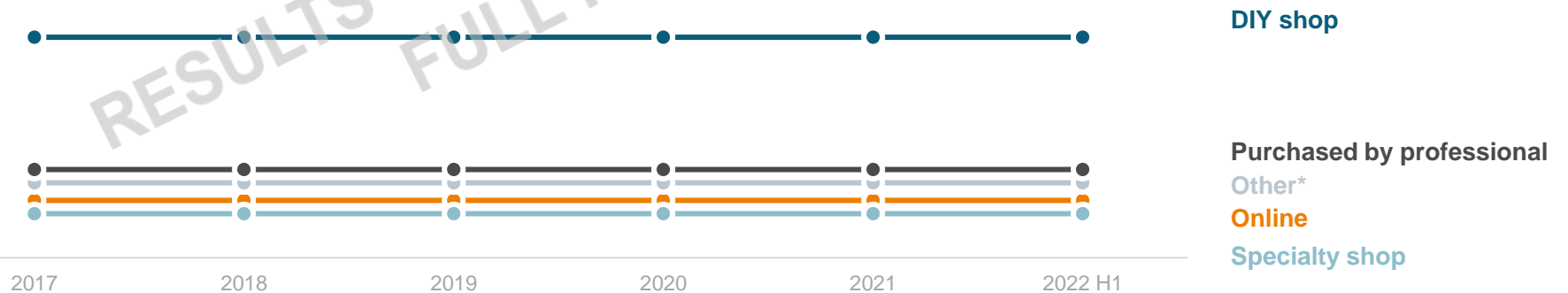
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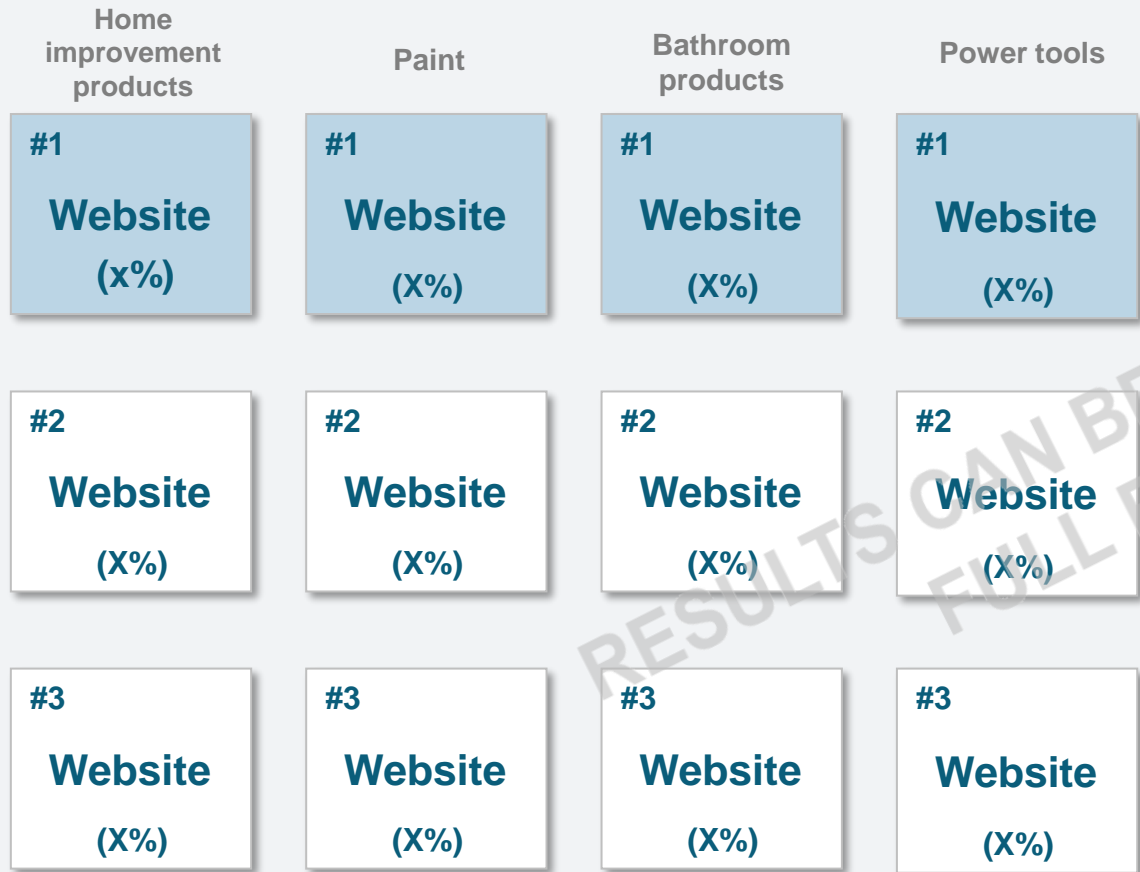


\*Category "Other" includes: Furniture shop, Garden centre, Wholesaler and Other shops

# UK

## Top of mind website

Q: What website comes to mind first when you think about online purchasing of:



## Purchasing via Amazon

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

### Purchased via in the past 12 months?

2020	2022
X%	X%

## Purchasing via national number one retailer

Q: Have you purchased any products via national number one retailer in the past 12 months?

2020

X% have purchased via the national number 1 retailer

2022

X% have purchased via the national number 1 retailer

# Index

KEY INSIGHTS

EUROPEAN DEVELOPMENTS

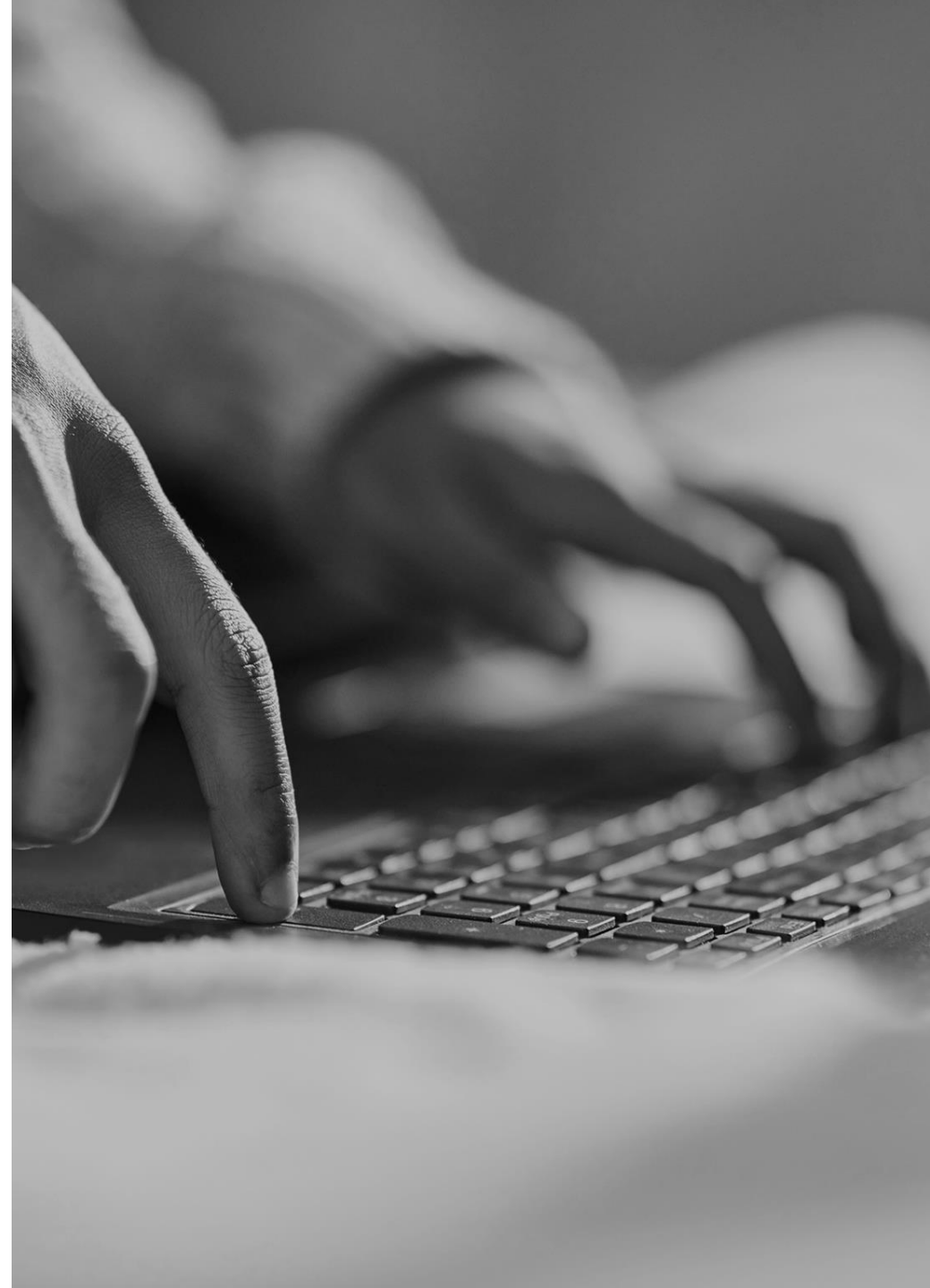
THEME: PURCHASE CHANNELS

EUROPEAN OVERVIEW

COUNTRY OVERVIEW

HOME IMPROVEMENT PER CATEGORY

APPENDIX



# 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

1<sup>st</sup> chapter – EU results are based on 26,400 interviews per year

2<sup>nd</sup> chapter – EU level based on approx. 6,600 interviews

3<sup>rd</sup> 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

4<sup>th</sup> 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

			18-34	35-54	55+
Male	Female				
47%	53%	Austria	25%	40%	35%
49%	51%	Belgium	31%	35%	34%
53%	47%	Denmark	22%	30%	48%
49%	51%	France	30%	37%	32%
49%	51%	Germany	29%	35%	35%
50%	50%	Italy	34%	36%	30%
46%	54%	Netherlands	25%	37%	39%
48%	52%	Poland	34%	37%	29%
51%	49%	Spain	33%	37%	30%
48%	52%	Sweden	30%	31%	39%
50%	50%	UK	30%	35%	35%

[GENDER]

[AGE]

## 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
Sealants	Bath	Flooring products	Airconditioning	Fillers	Drill	Dormer windows	Locks
Tile adhesive	Bathroom furniture	Paint	Boiler (Central heating system)	Safety products (e.g., masks or respirators)	Electrical saw	Roof windows	Security camera
	Shower enclosures	Wallpaper	Ventilation	Sandpaper	Electrical screwdriver		Smoke alarm or fire alarm
	Shower set/ shower head	Window decoration		Tapes	Hammer drill		
	Shower tray				Sander		
	Taps & mixers						
	Toilet						
	Washbasin						
	Whirlpool						
	Shower drain (for tiled shower floor)						

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