



# European Home Improvement Monitor Q2 2023

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 6600 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 2023:**

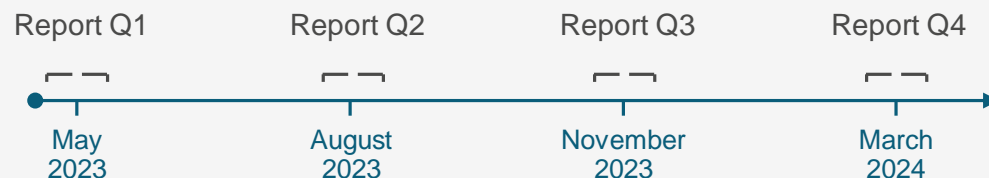
Q1: Orientation - Needs & willingness to invest in sustainability

**Q2: Purchase channels - Online performance of DIY stores**

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

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



## PROJECT TEAM



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## European home improvement spending (labour & material)



Base: n=26,400 per year | EU averages are weighted in order to account for population size

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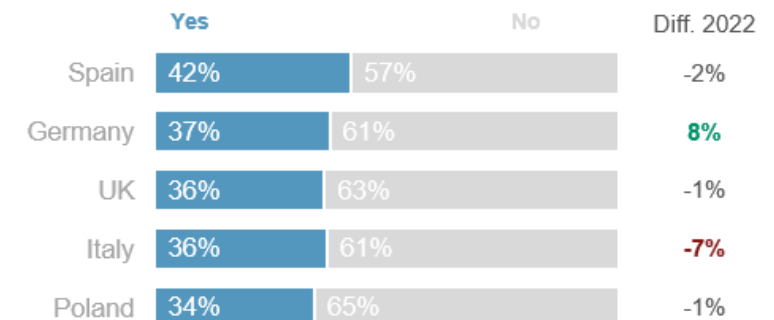
### Top of mind website

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



### Home improvement purchases via Amazon

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



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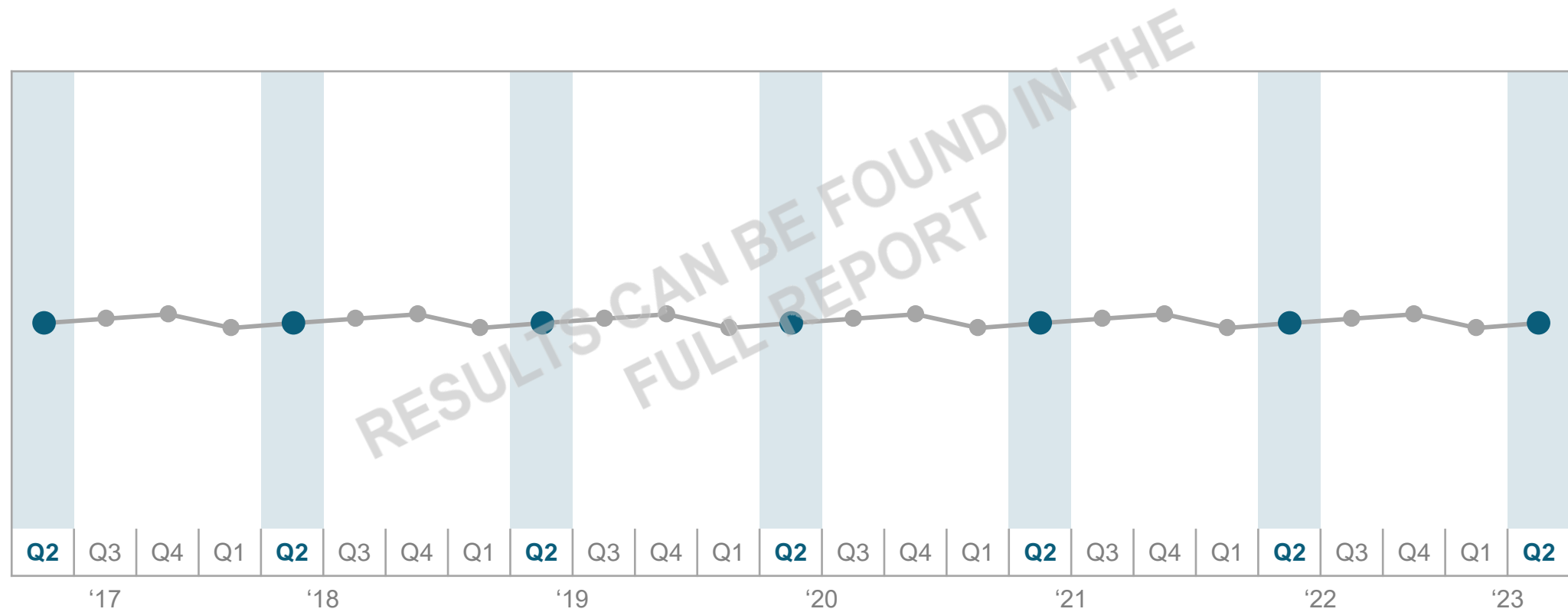
Home improvement per category

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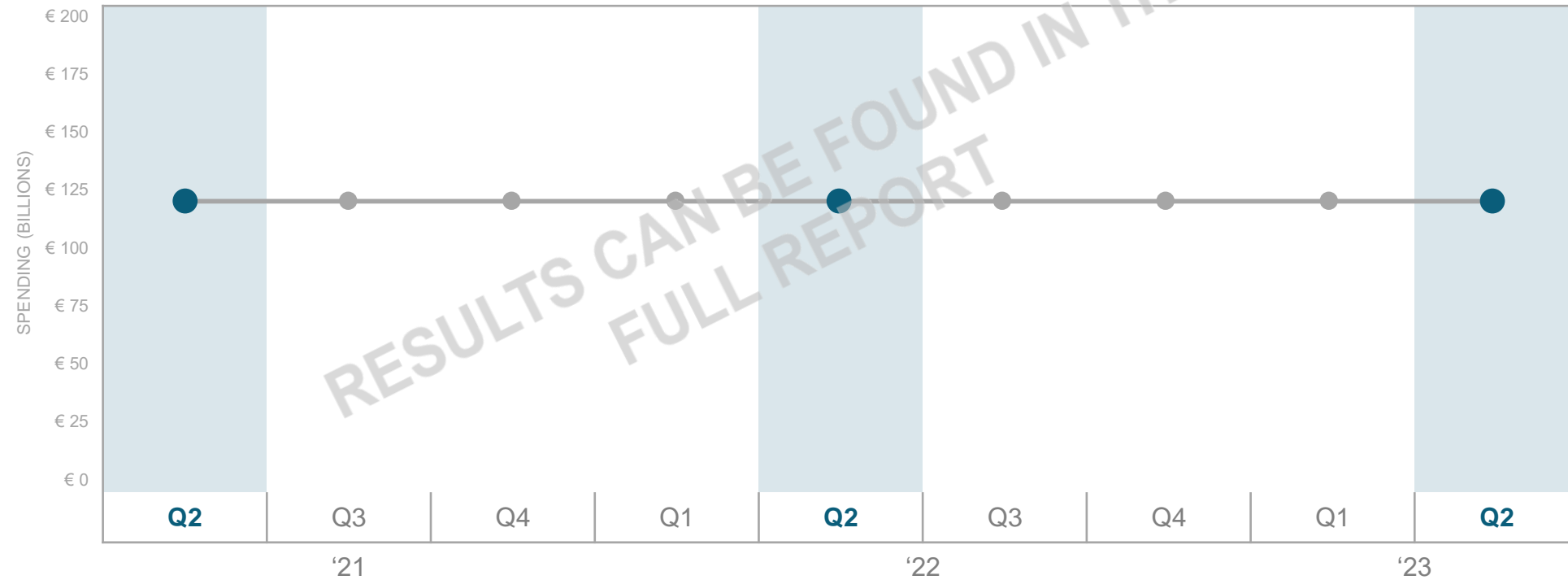
Share of households that have done a home improvement job  
2023 Q2





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## European spending on labour + material 2023 Q2



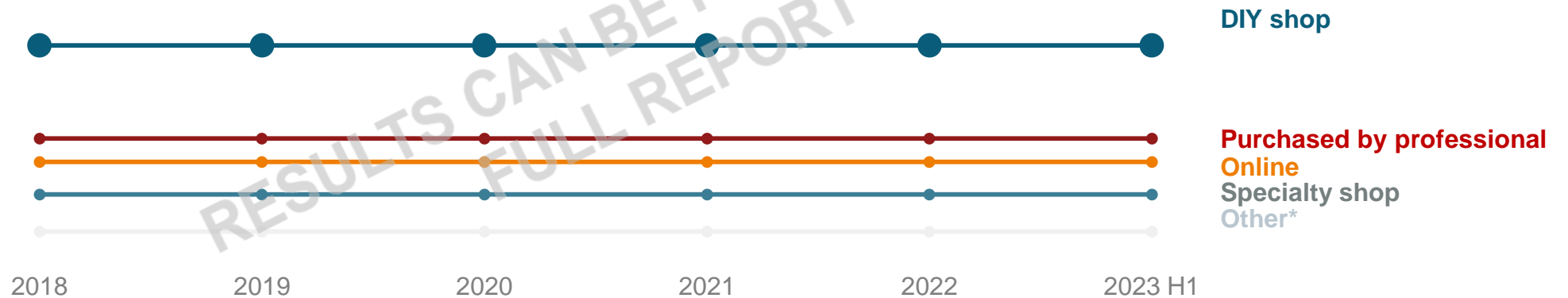
\*Only home improvement jobs in which less than 10k (in euros) was spent are included in the calculation.



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## Purchase channels [TREND]

Where did you buy the product?



Base: n=26,400 per year | EU averages are weighted in order to account for population size

*\*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.*

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## Purchase channels [TREND]

Where did you buy the product?

Purchase channel	2018	2019	2020	2021	2022	2023 H1
<b>DIY shop ↓</b>	x%	x%	x%	x%	x%	x%
<b>Purchased by professional ↑</b>	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

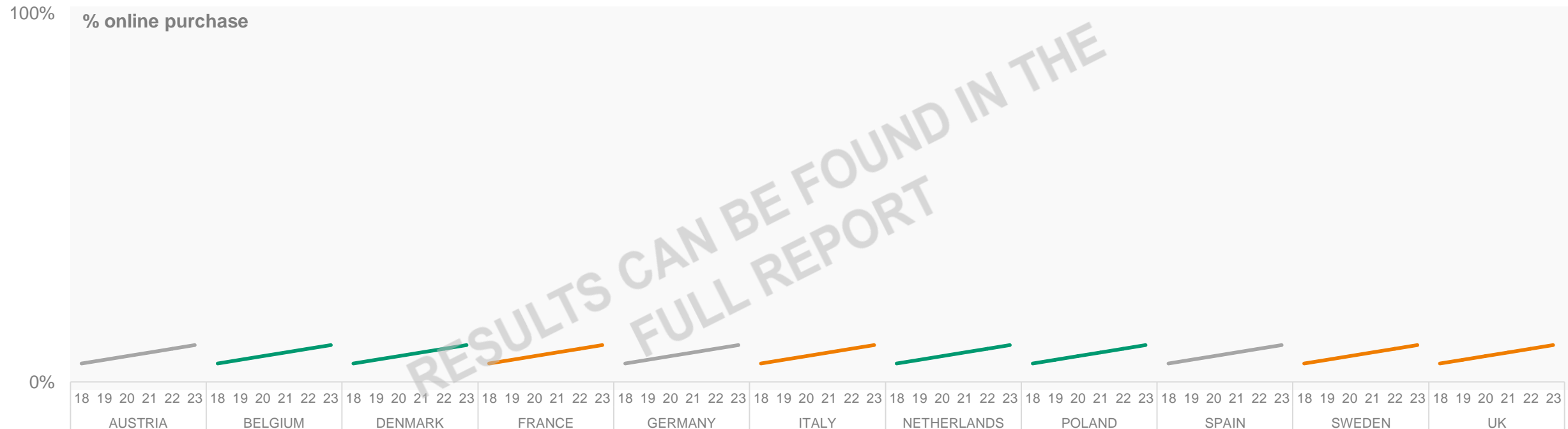
Results in this chapter (EU averages) are weighted in order to account for population size. N=approx. 26,400 – total level per year, with around 26 product categories combined.

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

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## Purchase channels [TREND BY COUNTRY]

Where did you buy the product?



Number of observations approximately 7,000 – per country per year between 2015-2022 and 1,200 for the first half of 2023, 107 products overall combined.

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## Purchase channels [TOP 5]

Where did you buy the product?



Type of products		% online buying
MOST PURCHASED	Lorem ipsum	x%
	Lore ipsum	x%
	Lore ipsum	x%
	Lore ipsum	x%
	Lore ipsum	x%
LEAST PURCHASED	Lore ipsum	x%
	Lore ipsum	x%
	Lore ipsum	x%
	Lore ipsum	x%
	Lorem ipsum	x%

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Where did you buy the product?

[2022]



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, 26 products overall combined)

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

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## Shopping experience

What rating do you give the online shopping experience in general at the following stores? [1 to 10]

#1	#2	#3	#4	#5
<div>Brand</div> <div>(x.x)</div>	<div>Brand</div> <div>(x.x)</div>	<div>Brand</div> <div>(x.x)</div>	<div>Brand</div> <div>(x.x)</div>	<div>Brand</div> <div>(x.x)</div>
#6	#7	#8	#9	#10
<div>Brand</div> <div>(x.x)</div>	<div>Brand</div> <div>(x.x)</div>	<div>Brand</div> <div>(x.x)</div>	<div>Brand</div> <div>(x.x)</div>	<div>Brand</div> <div>(x.x)</div>

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## Number one store in country per aspect

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

	AT	BE	DK	FR	DE	IT	NL	PL	ES	SW	UK
<b>The shopping experience in general</b>	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x
<b>Navigation on the website / easy to find the product I needed</b>	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x
<b>Advice on the website/product information</b>	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x
<b>Delivery time / pick-up time</b>	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x
<b>Communication about the order</b>	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x	Brand x.x



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## 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:

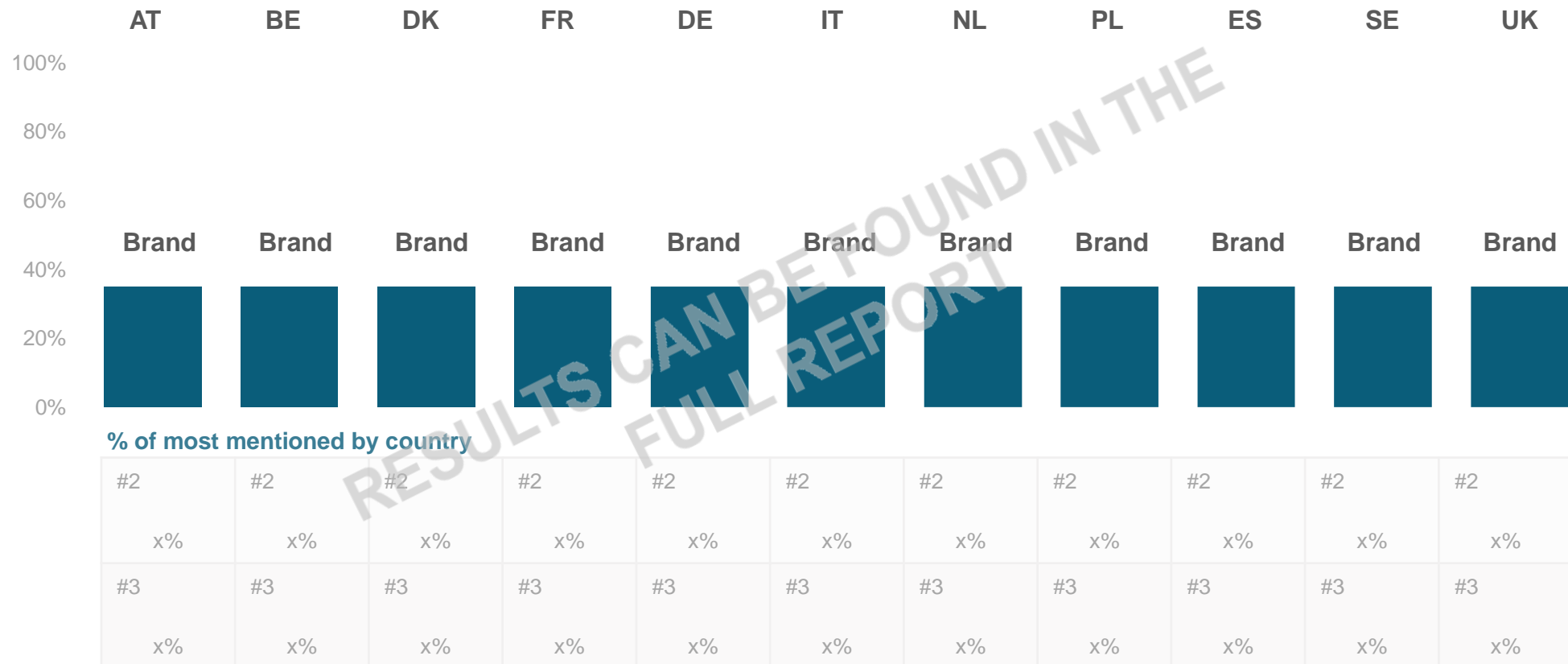


- What website comes to mind first when you think about online purchasing of <home improvement products / Paint / Bathroom products (tap, showerhead, wash basin etc.) / Power tools?
- What website would be your second choice when you think about online purchasing of <home improvement products / Paint / Bathroom products (tap, showerhead, wash basin etc.) / Power tools?
- Have you purchased any products online via Amazon in the past 12 months?
- 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 in the same period last year?
- 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?
- Have you purchased anything online at the following online stores during the past 6 months?
- What rating do you give the online shopping experience at <store >? (on a scale of 1-10)
- 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?

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### Top of mind website

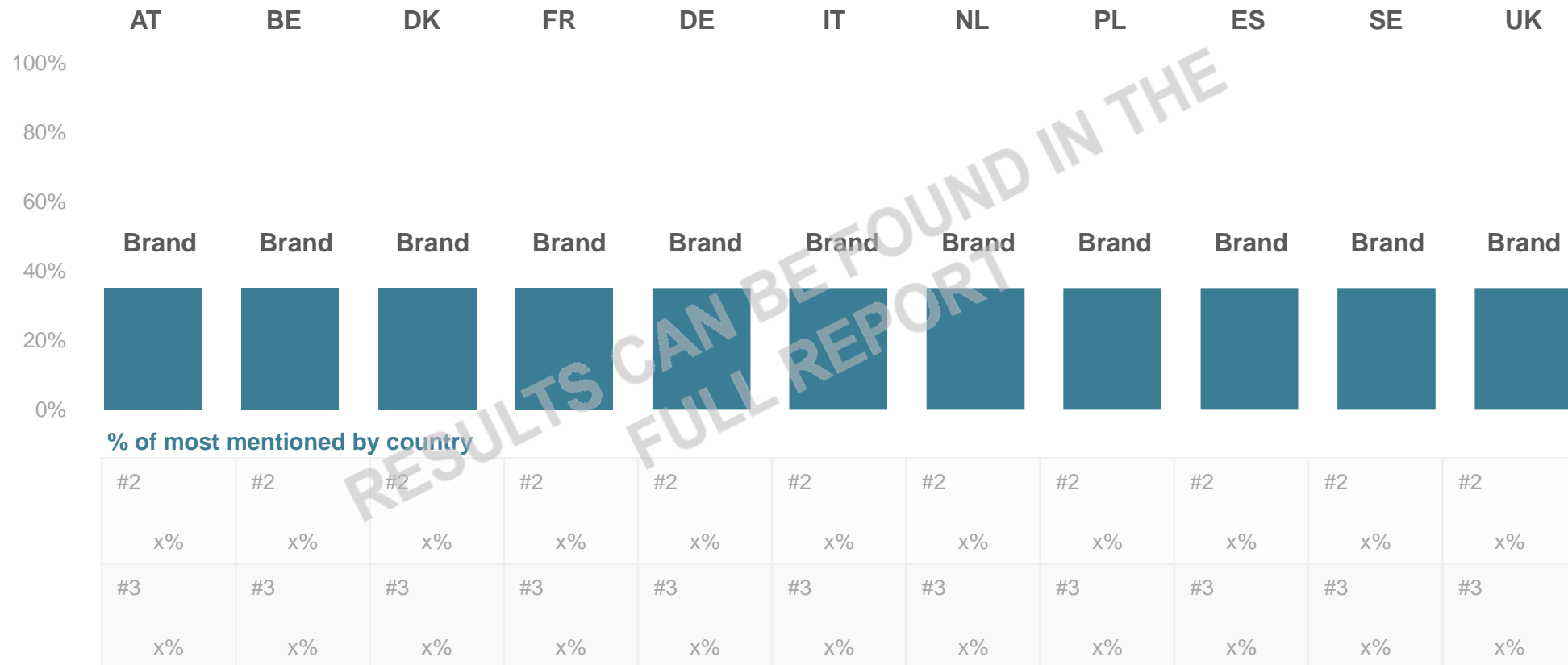
What website comes to mind first when you think about online purchasing of **home improvement products**:



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## Top of mind website

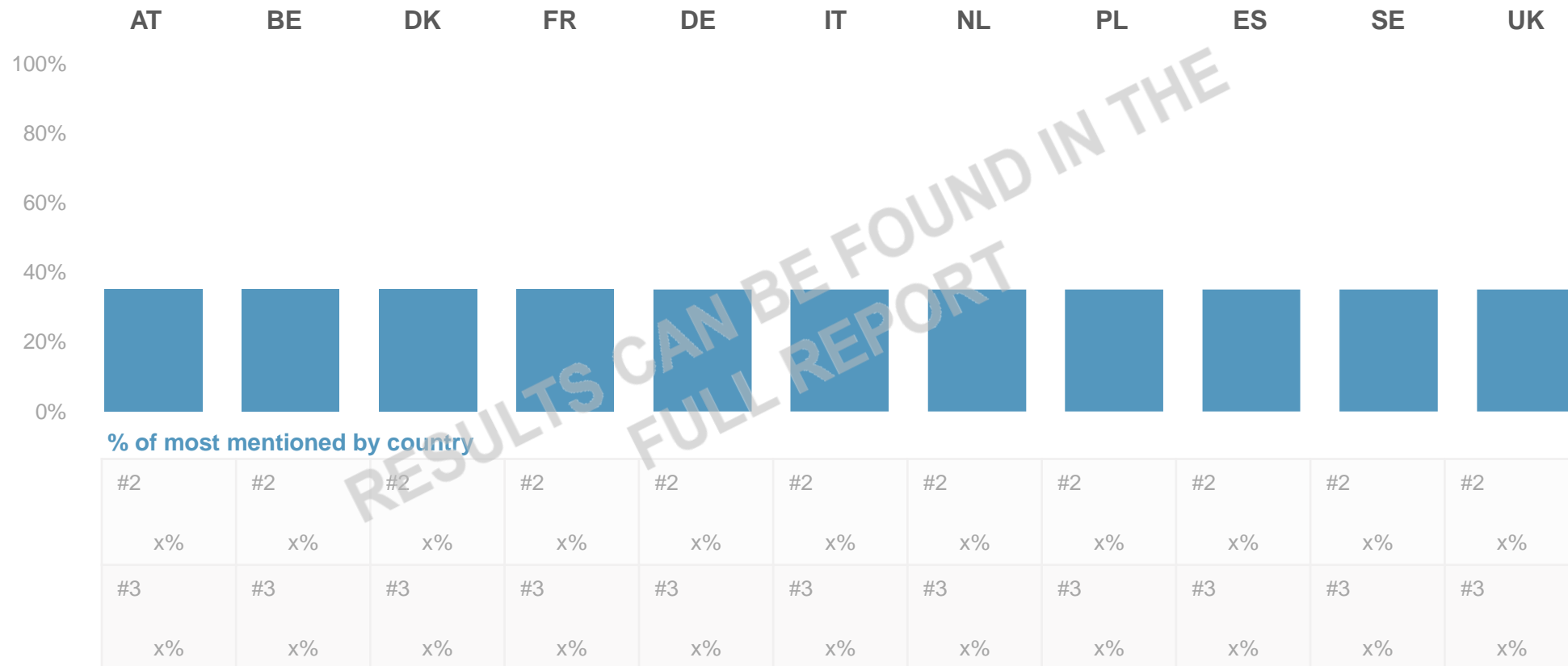
What website comes to mind first when you think about online purchasing of **paint**:



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## Top of mind website

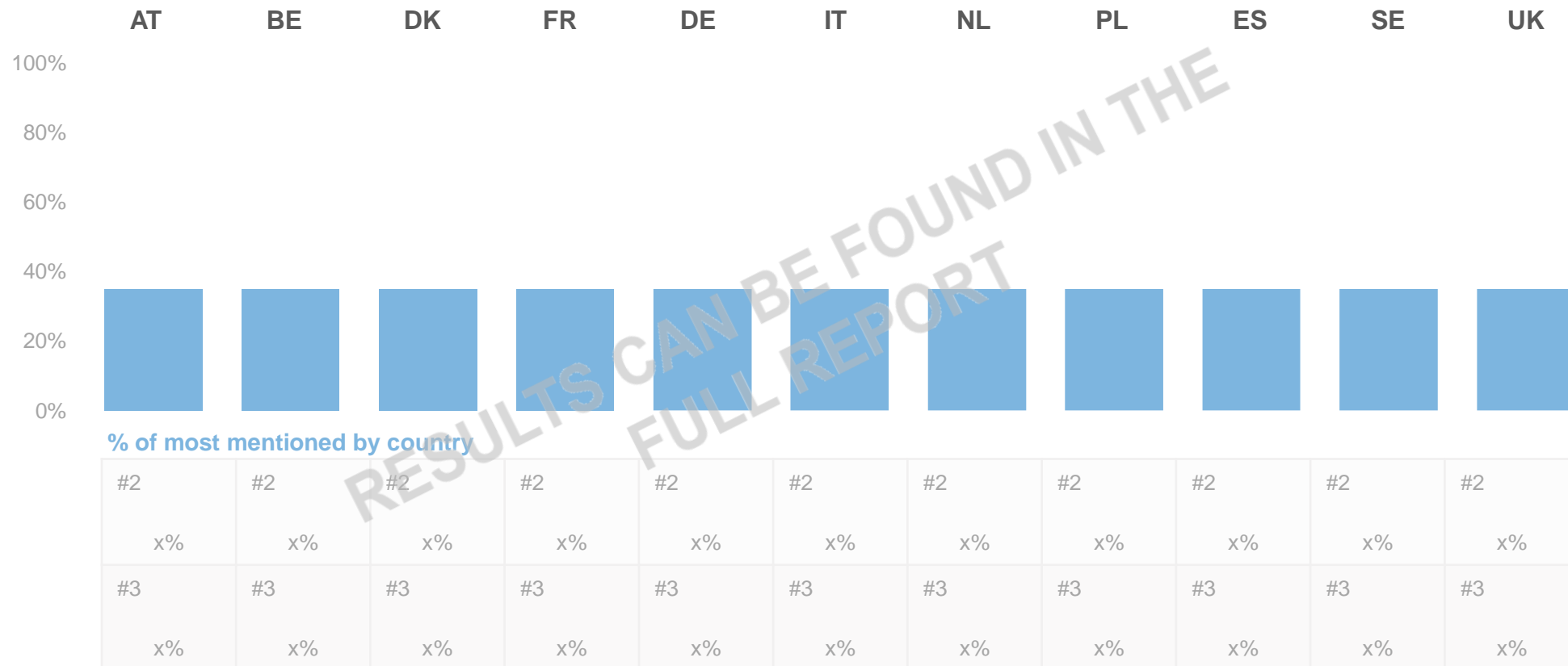
What website comes to mind first when you think about online purchasing of **bathroom products**:



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## Top of mind website

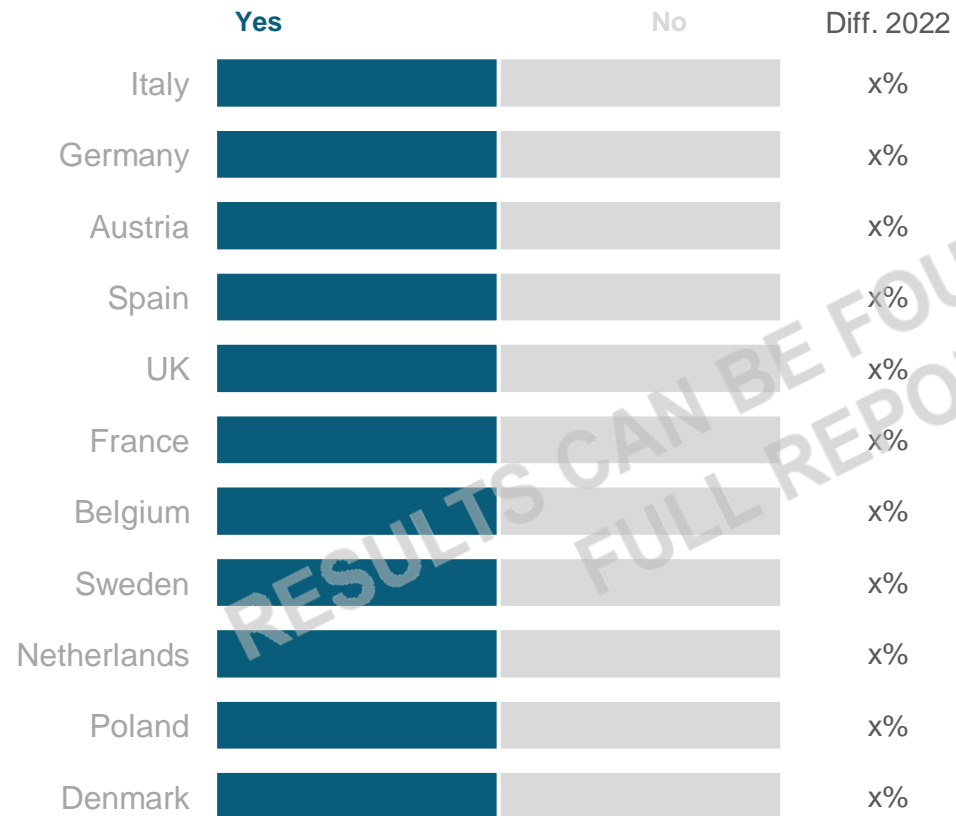
What website comes to mind first when you think about online purchasing of **power tools**:



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## Purchases via Amazon

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

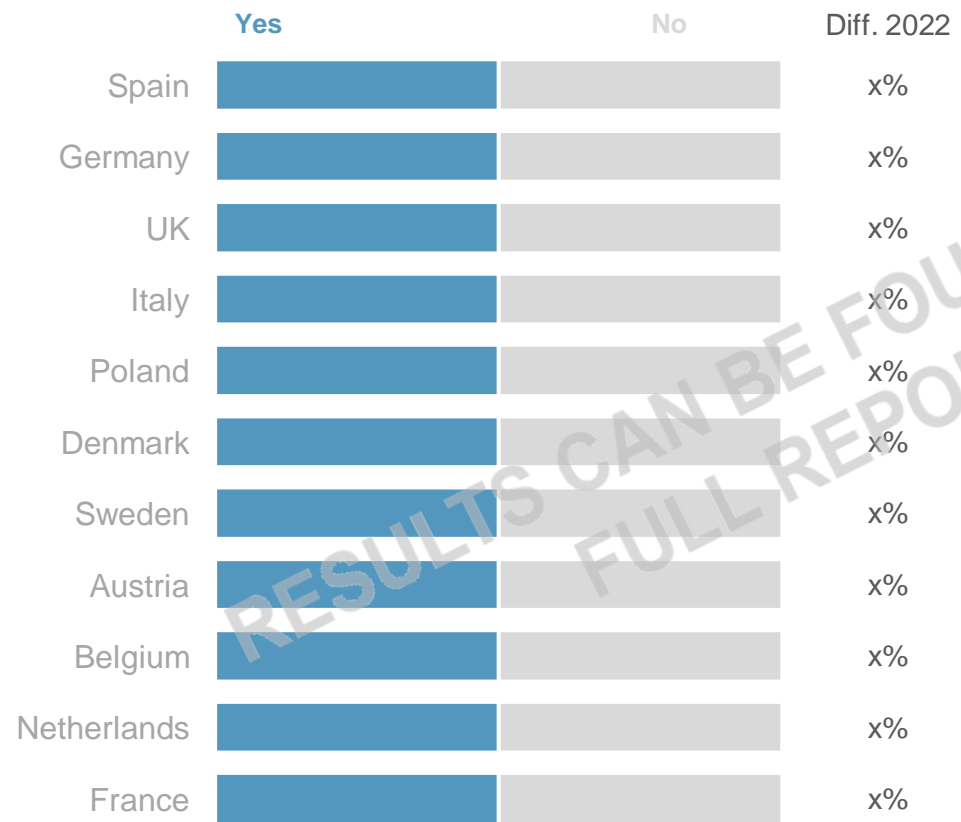




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Home improvement purchases via Amazon

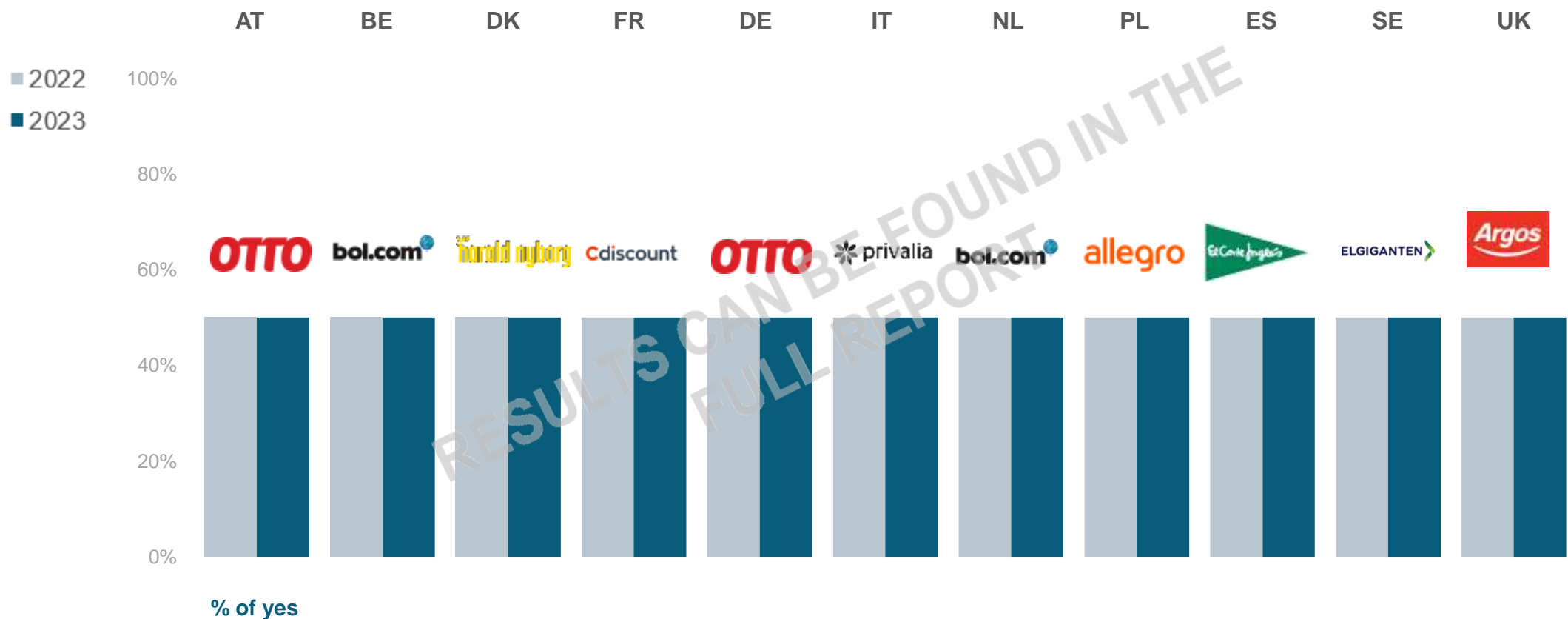
Have you purchased any home improvement products via Amazon in the past 12 months?



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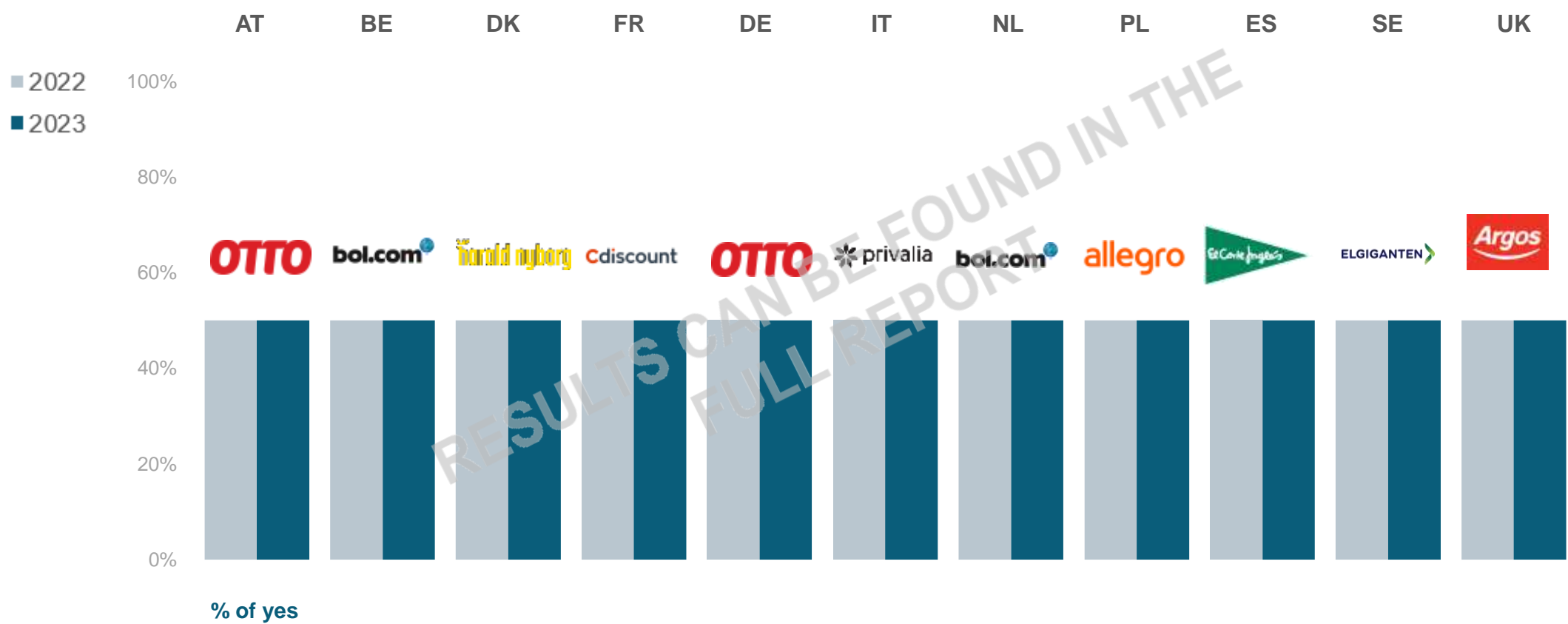
# Purchasing via national number one retailer

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



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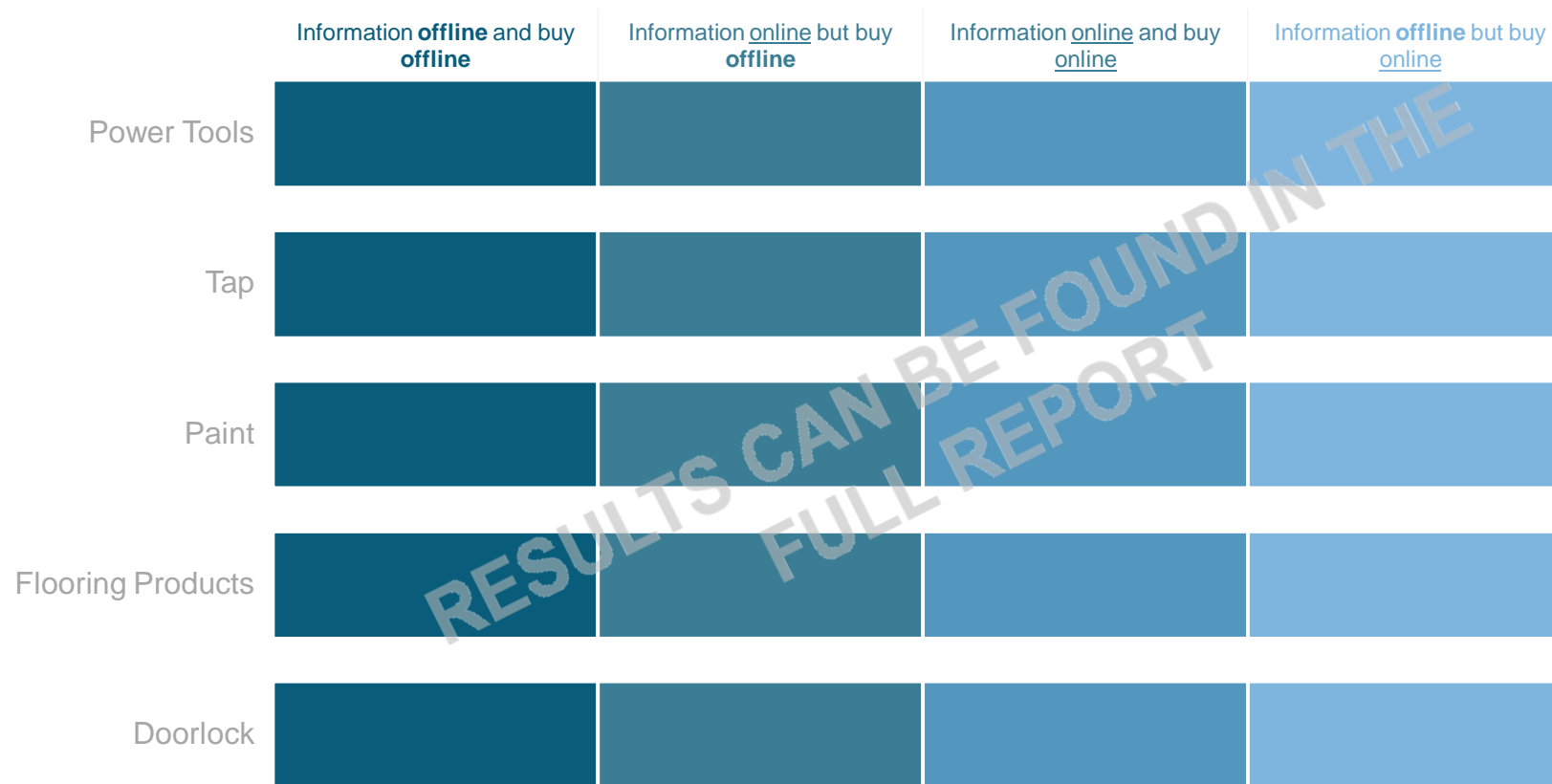
**Home improvement purchasing via national number one retailer**  
 Have you purchased any home improvement products via national number one online retailer in the past 12 months?



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## Purchasing approach

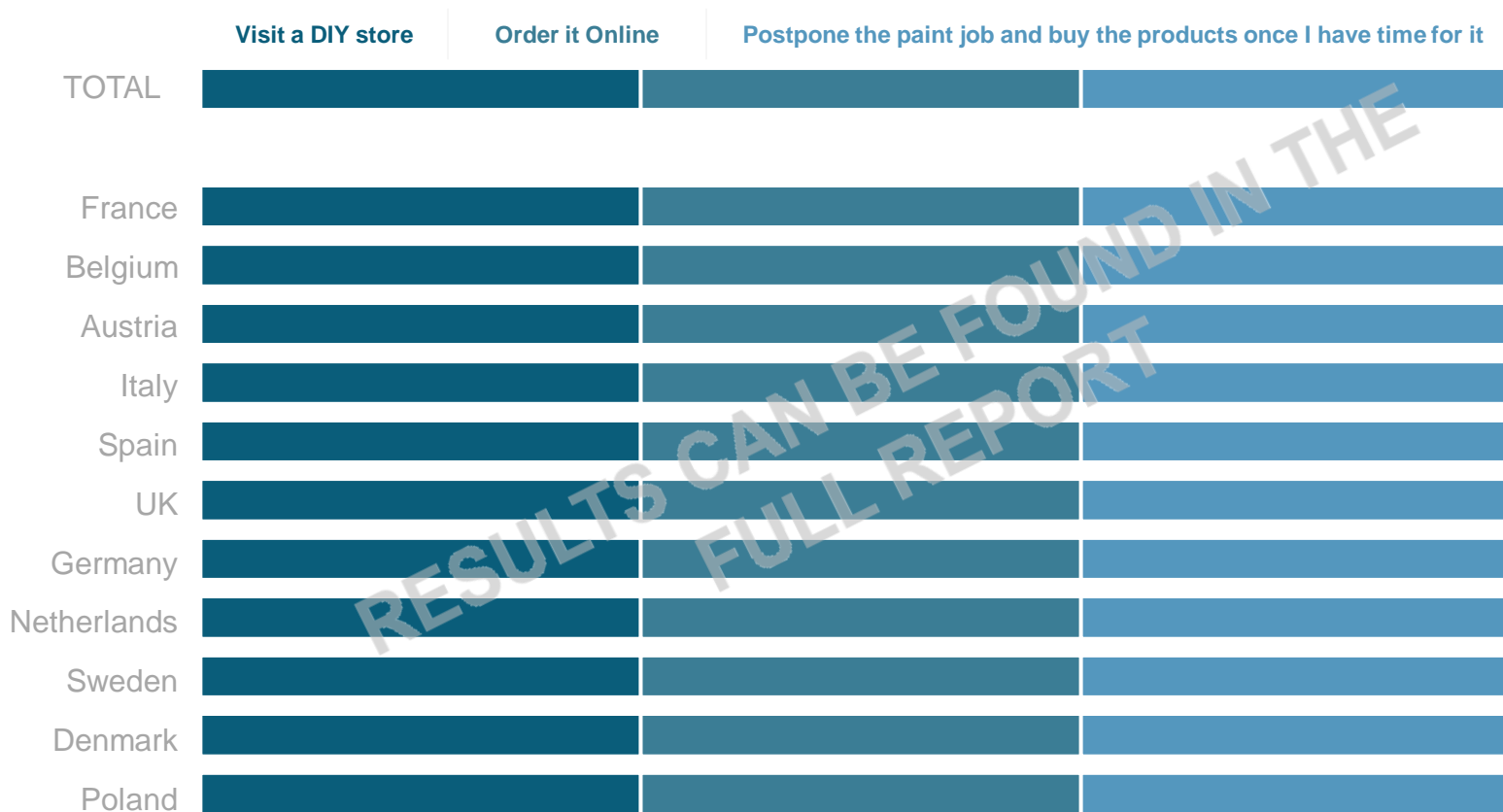
If you need to buy the following products how would you approach this? (offline being a physical store and online being a webshop)



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## Paint job

If you want to do a paint job in your house, how would you most likely get the paint and paint supplies for it?

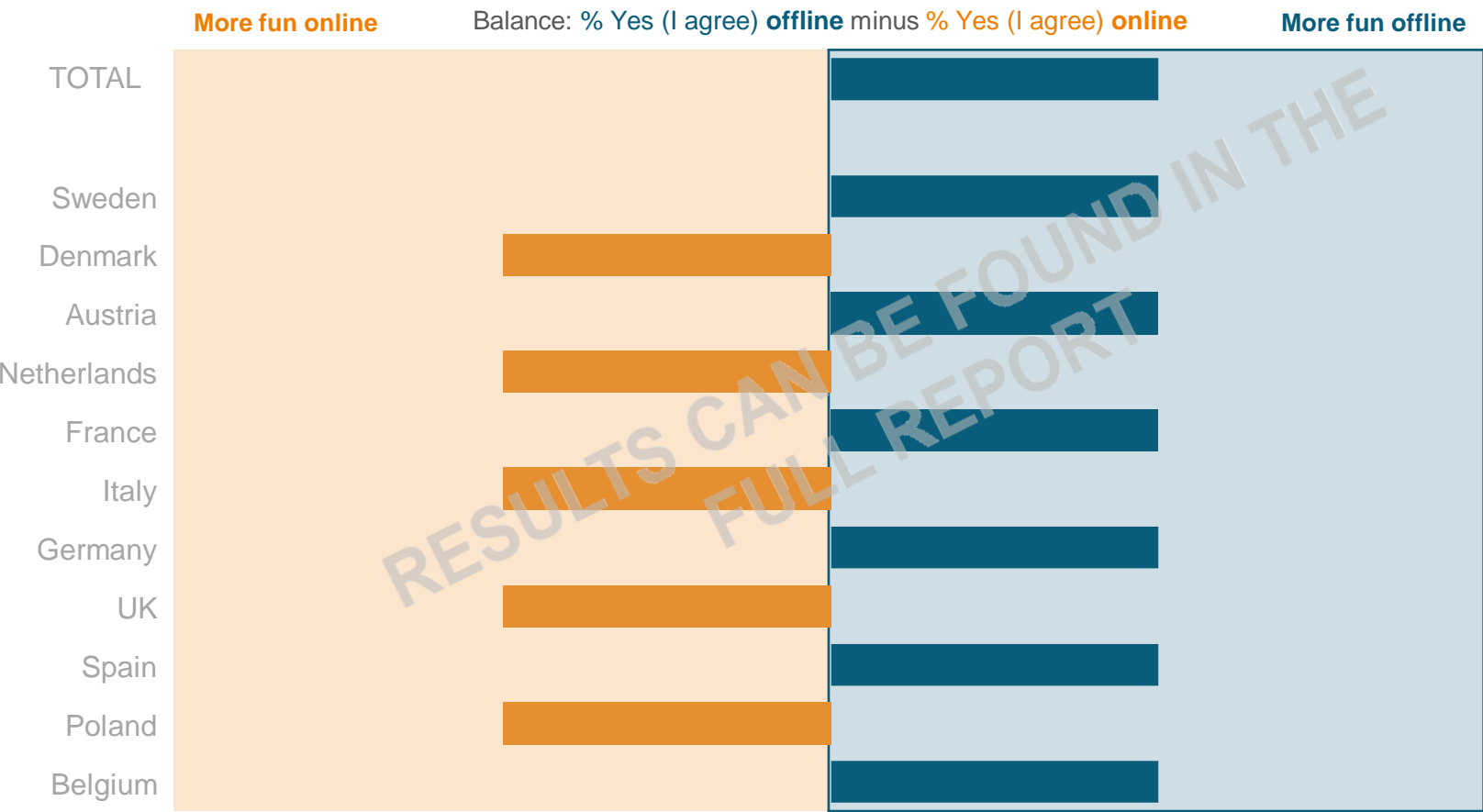


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Where is it more fun to shop

A: Shopping in physical stores for home improvement products is more fun than in online stores

B: Shopping in online stores for home improvement products is more fun than in physical stores

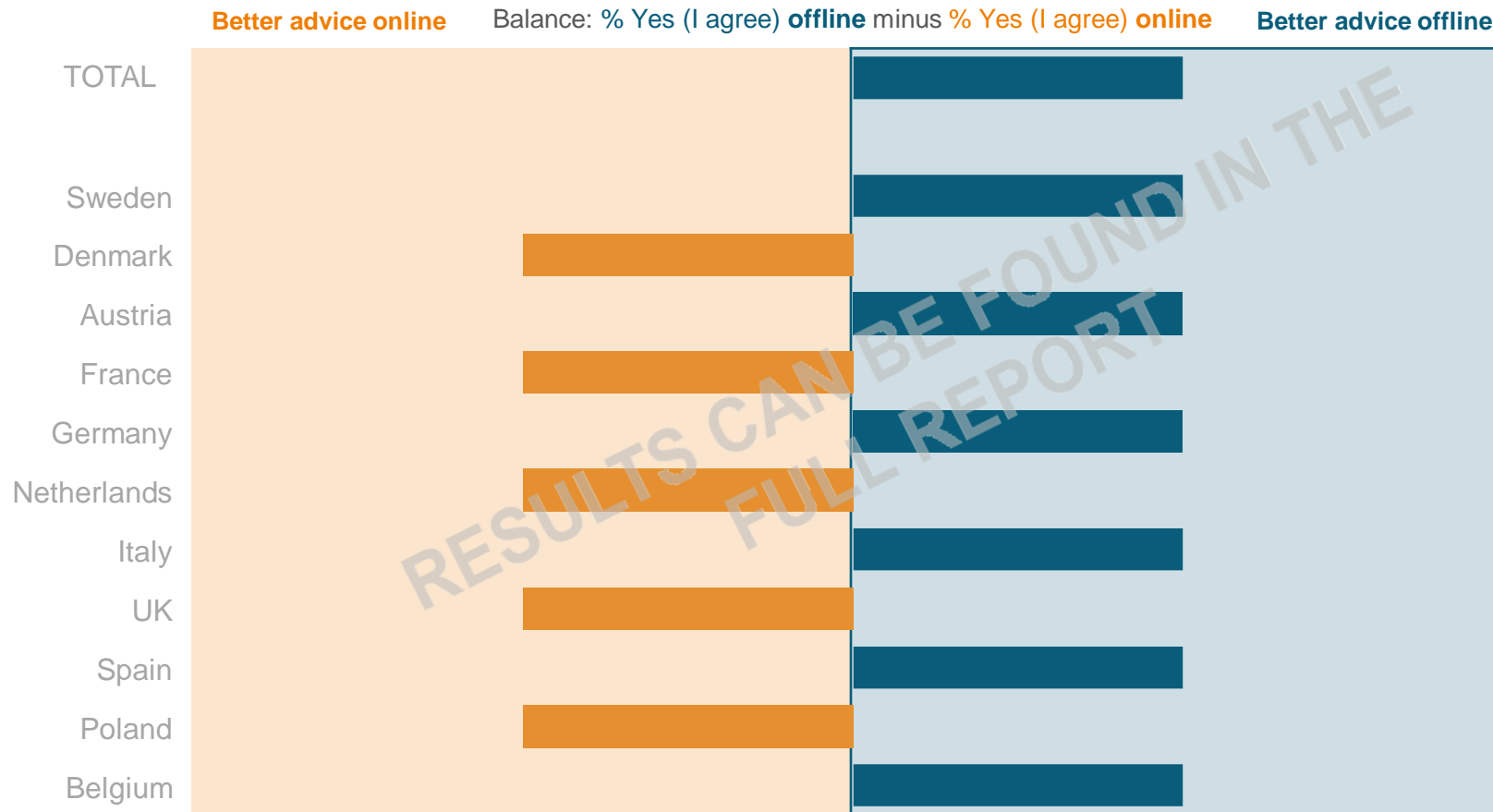


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## Where do they get better advice

A: In physical stores, you receive better advice on home improvement products than in online stores

B: In online stores, you receive better advice on home improvement products than in physical stores



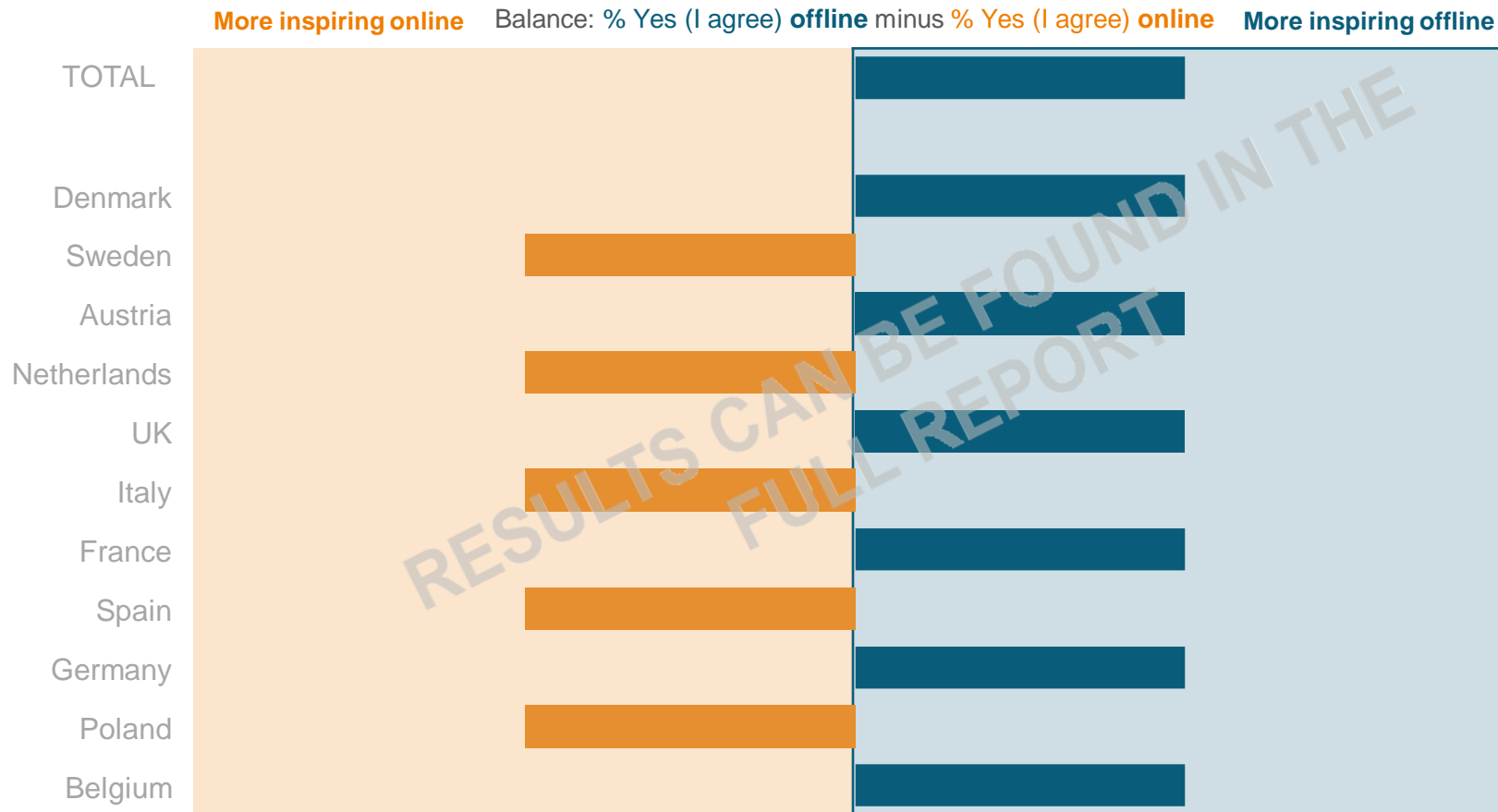


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### Where is it more inspiring

A: Physical stores for home improvement products are more inspiring than online stores

B: Online stores for home improvement products are more inspiring than physical stores



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## Outlook on home improvement

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 in the same period last year?



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## Outlook on decorative jobs compared to the last quarter in 2023

Looking forward to the next three 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?

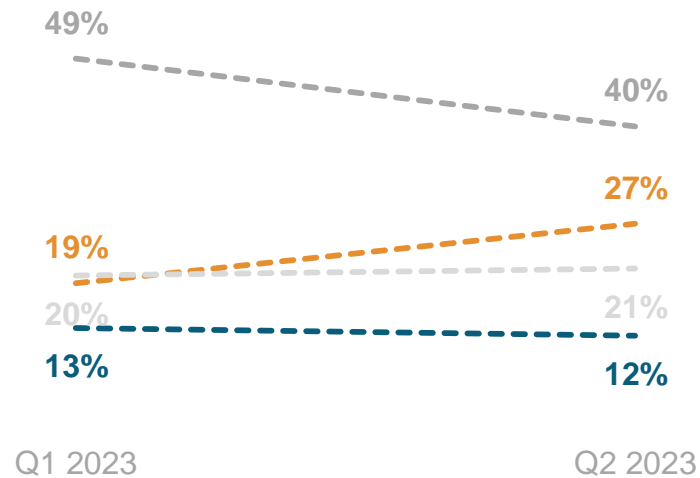
### Small decorative jobs

More jobs than same  
period last year

Same

Less jobs than same  
period last year

Don't know



N = 6600 per quarter

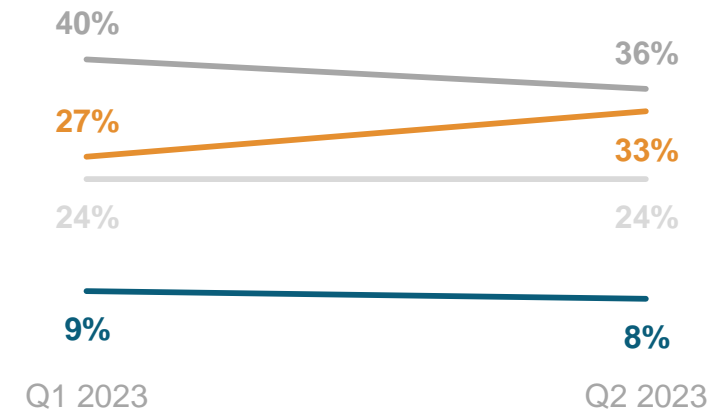
### Large decorative jobs

More jobs than same  
period last year

Same

Less jobs than same  
period last year

Don't know

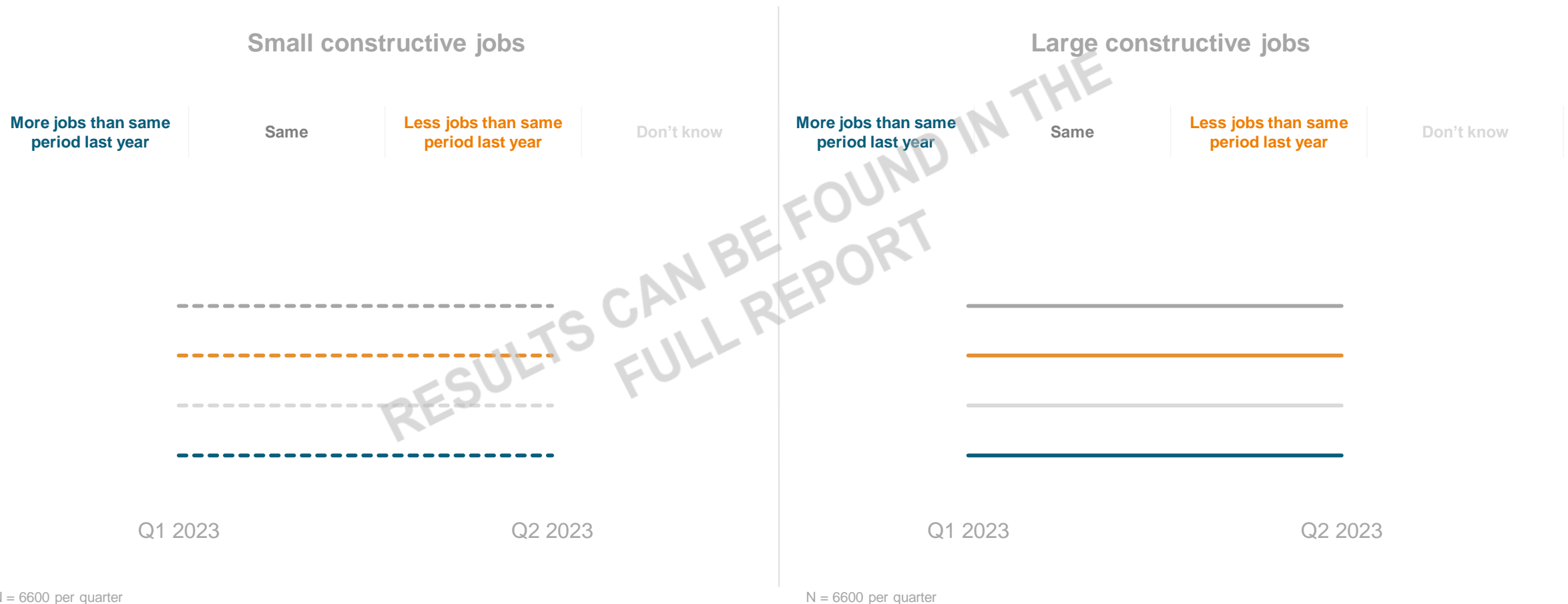


N = 6600 per quarter

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## Outlook on constructive jobs compared to the last quarter in 2023

Looking forward to the next three 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?



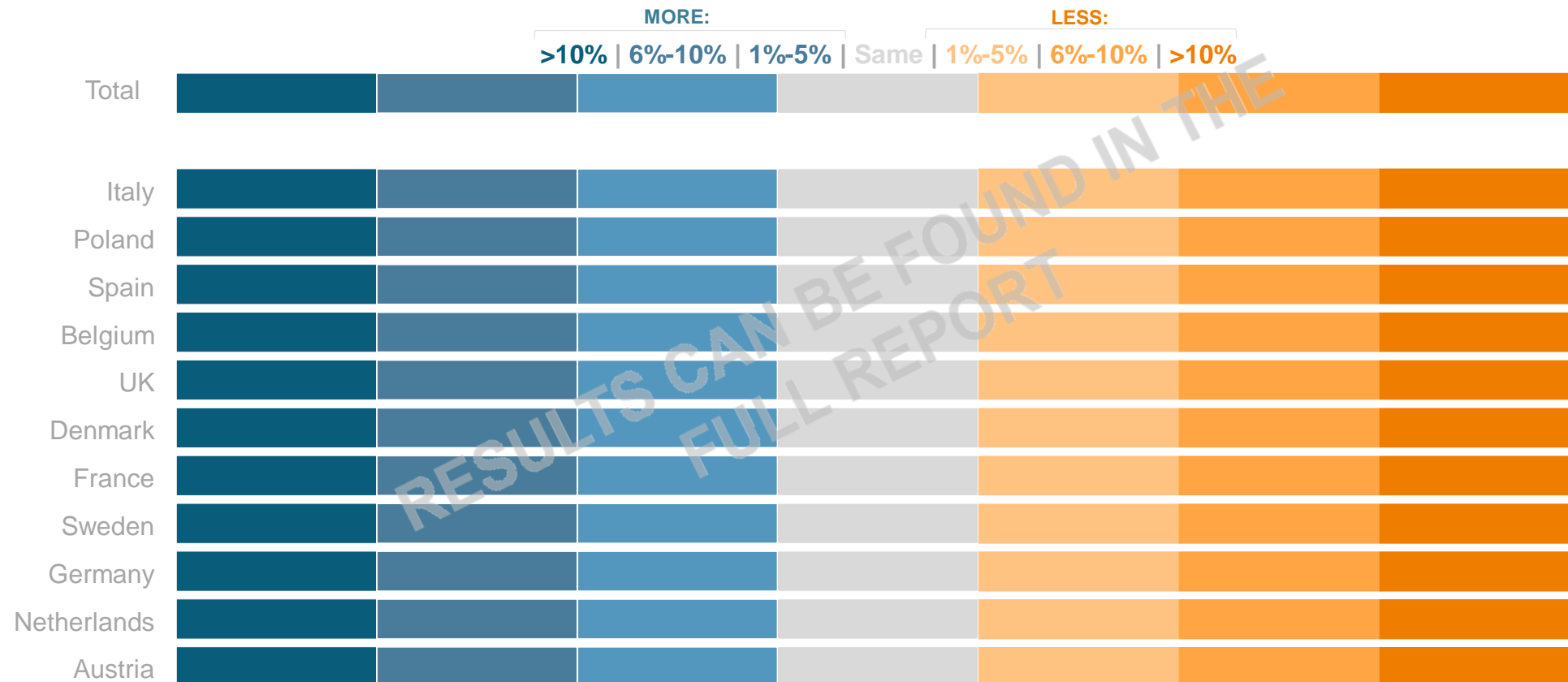
N = 6600 per quarter

N = 6600 per quarter

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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?



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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?



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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?

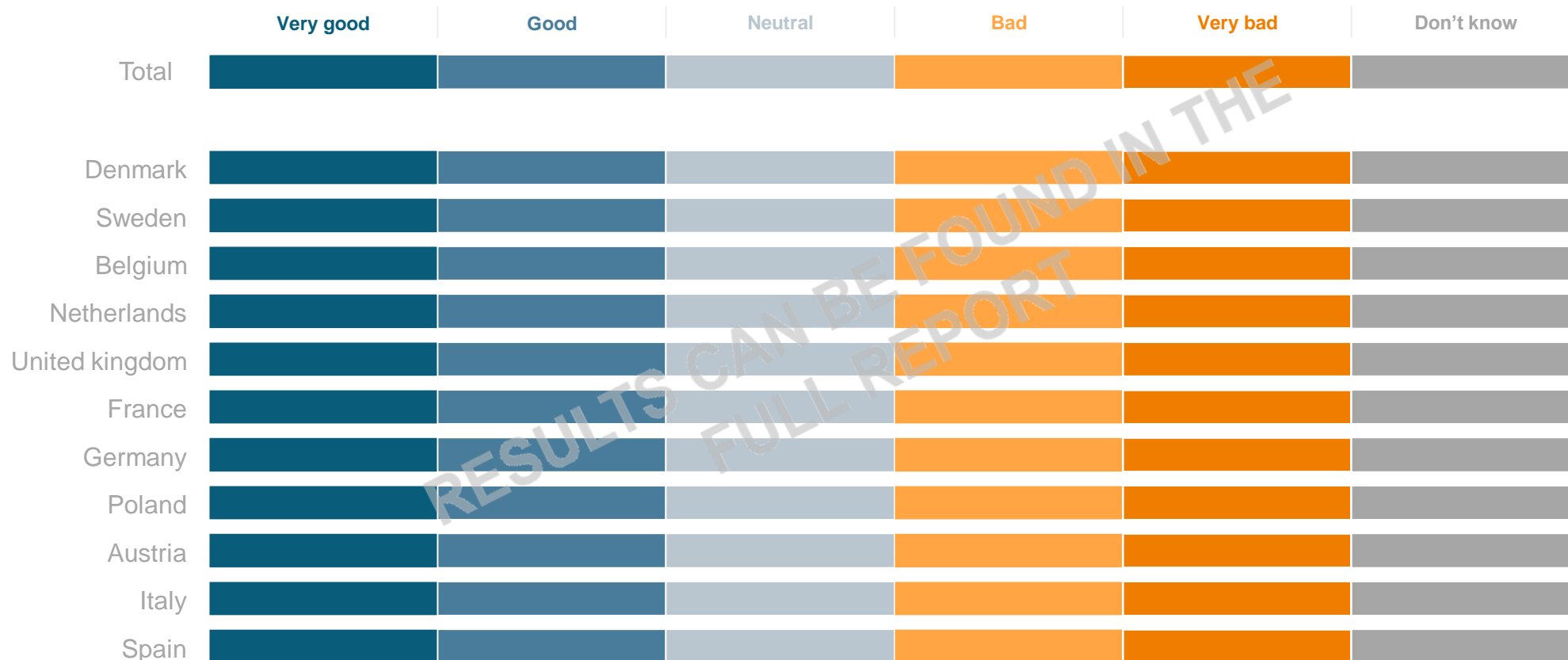




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## Start a project over €5.000

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



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## Start a project over €5.000

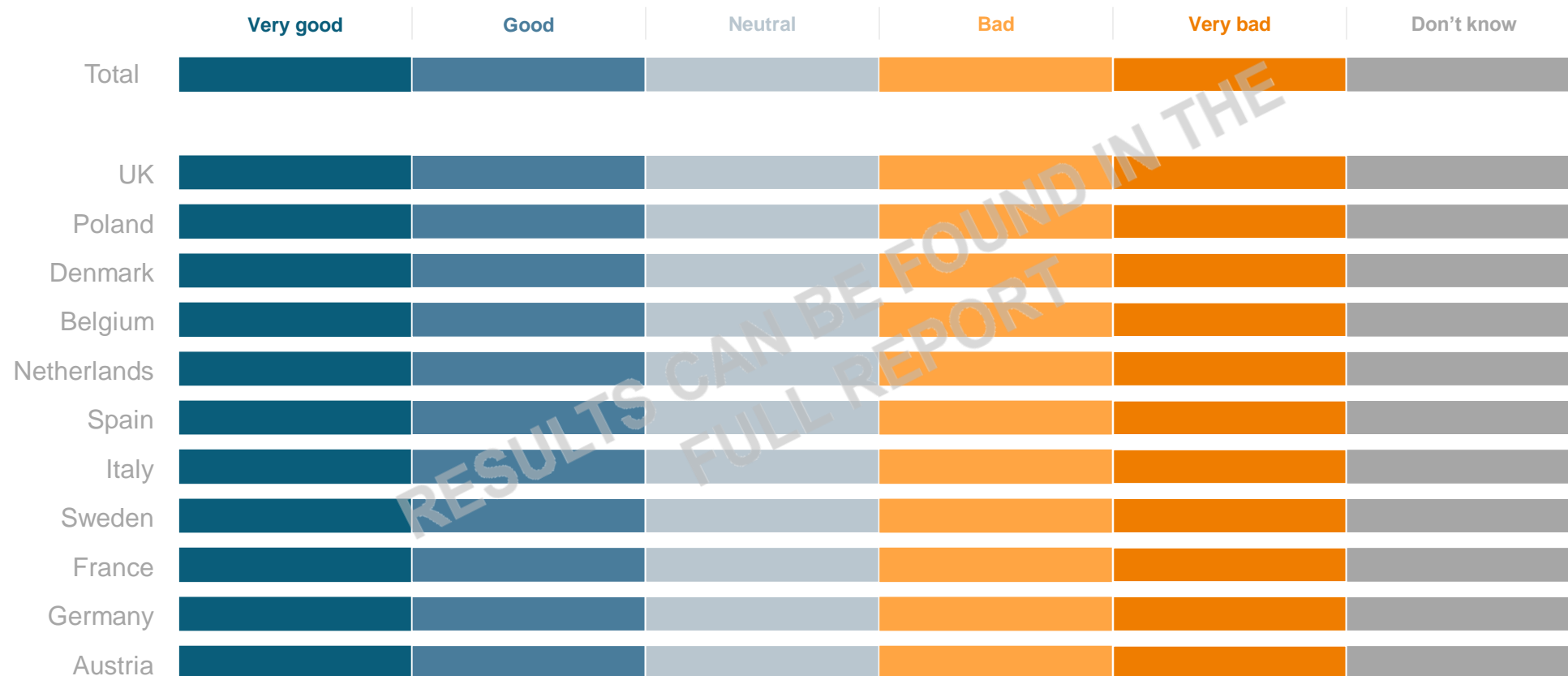
Do you feel this month is a good or bad time to start a project over €5.000 for home improvement, repair or maintenance?



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## Hire a professional

Do you feel this month is a good or bad time to hire a professional for home improvement, repair or maintenance?



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## Hire a professional

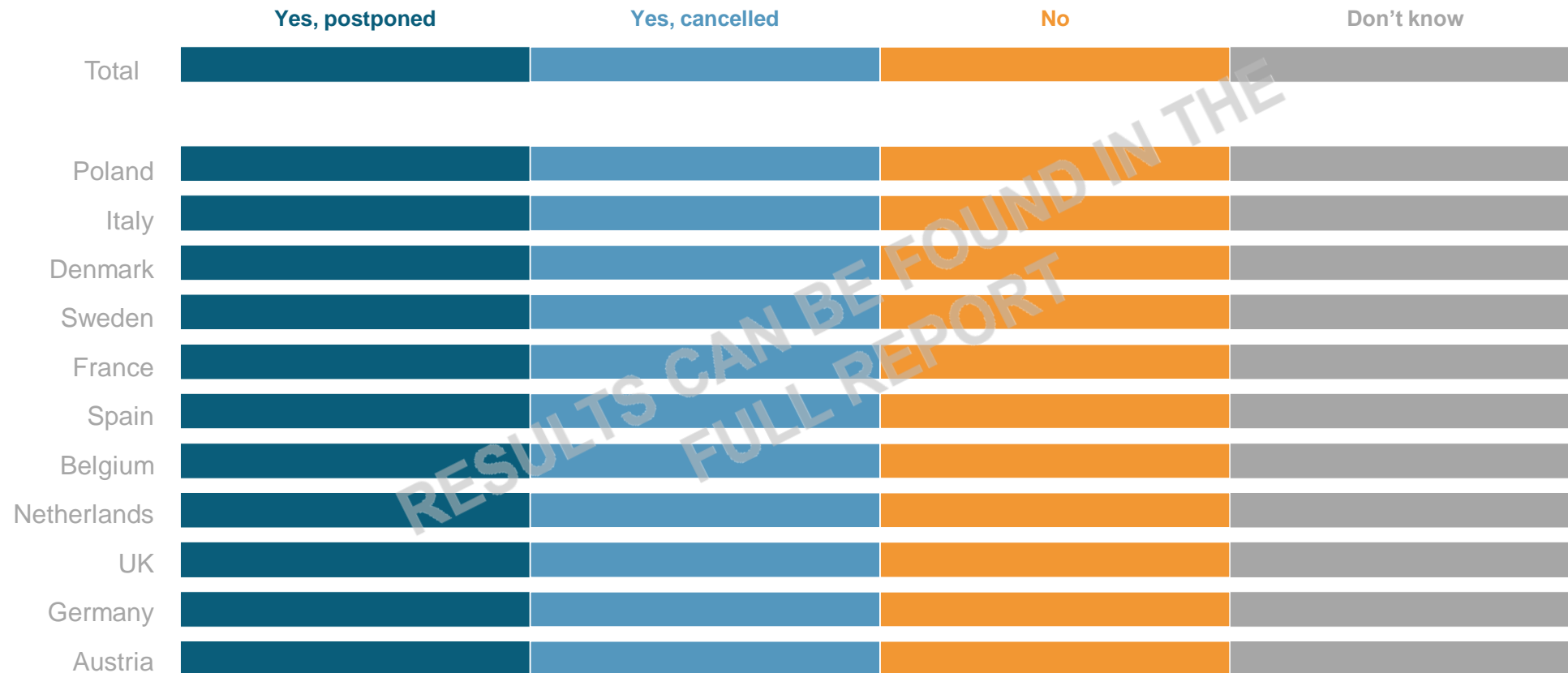
Do you feel this month is a good or bad time to hire a professional for home improvement, repair or maintenance?



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## Postponed / cancelled home improvement project

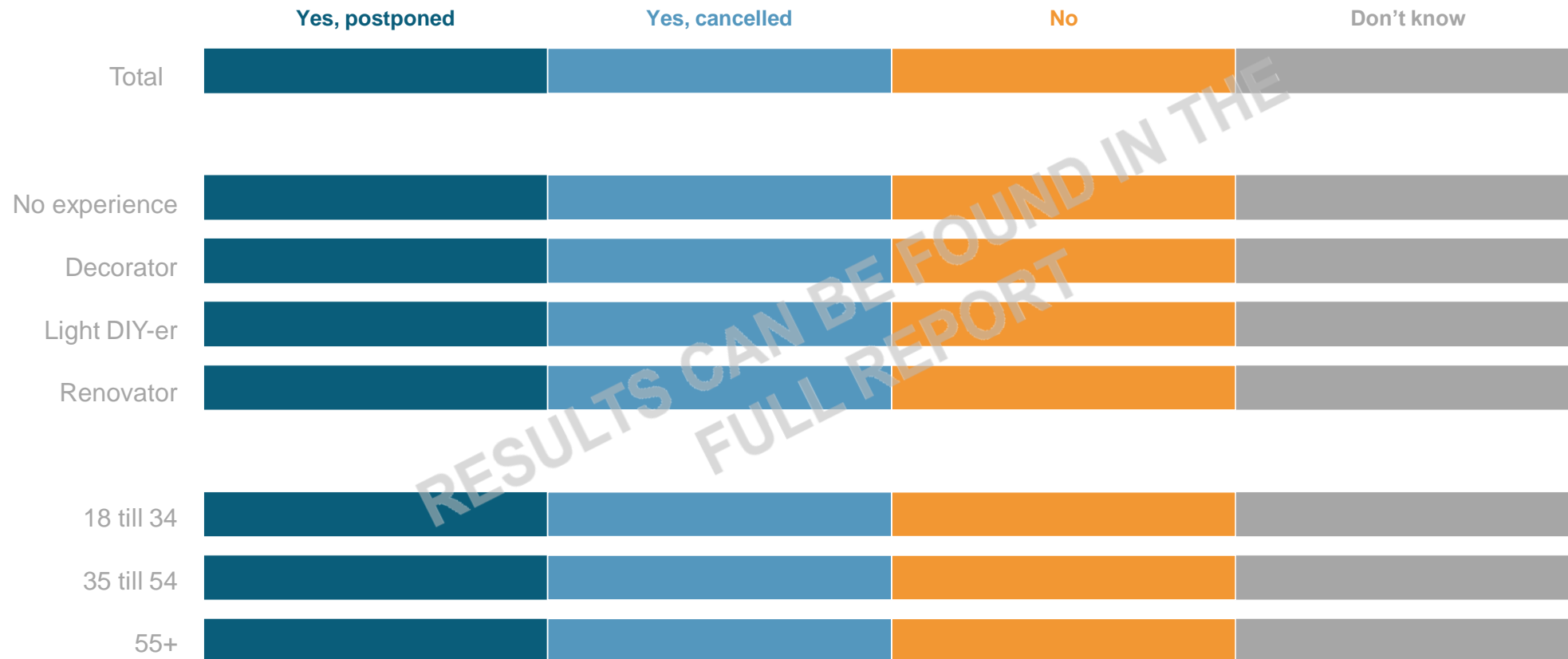
In the last 30 days, have you postponed or cancelled a home improvement, repair or maintenance project you planned to start?



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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?



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## Cancellation reasons

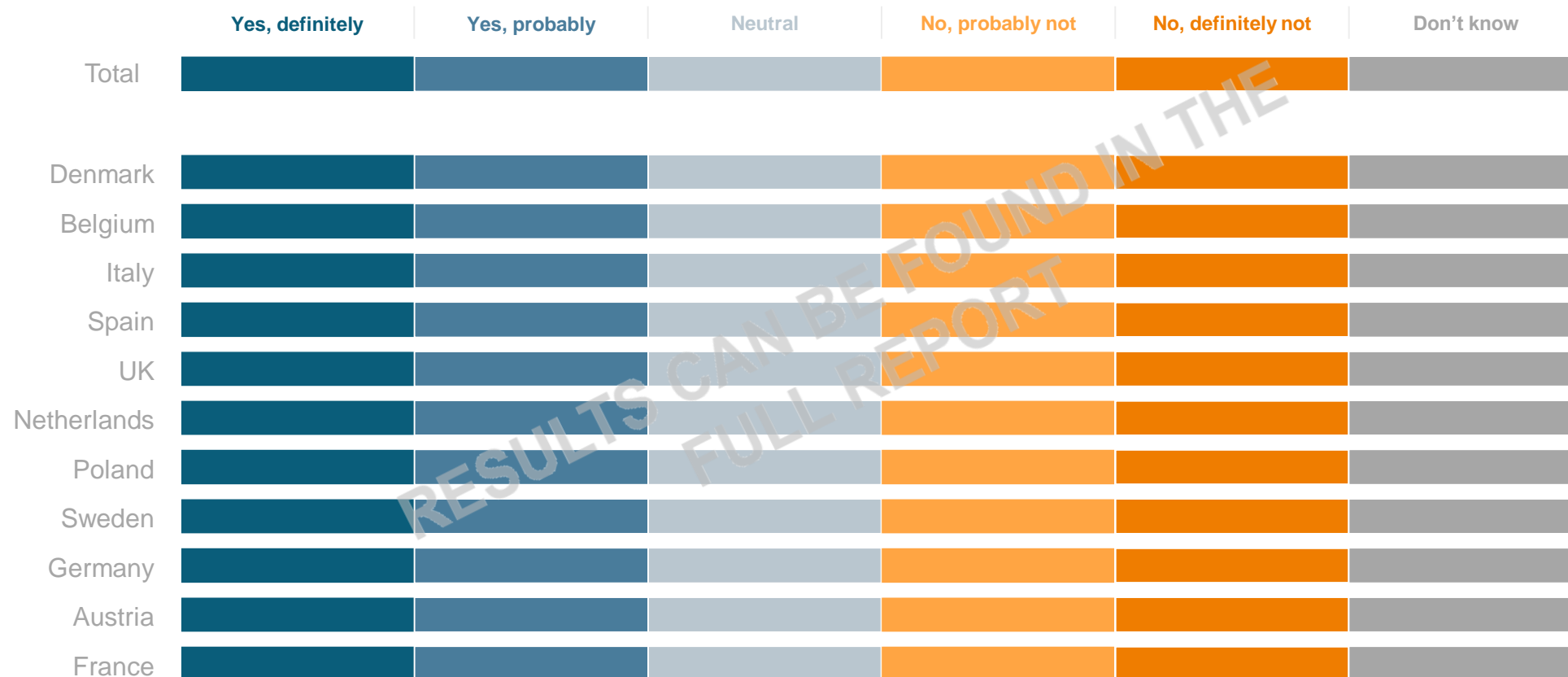
Why did you postpone or cancel your home improvement, repair or maintenance project?

	Total	AT	BE	DK	FR	DE	IT	NL	PL	ES	SE	UK
	N 1143	62	96	130	107	68	143	77	176	100	114	70
Lorem ipsum		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Lorem ipsum		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Lorem ipsum		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Lorem ipsum		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Lorem ipsum		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Lorem ipsum		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Lorem ipsum		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
Lorem ipsum		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

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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?

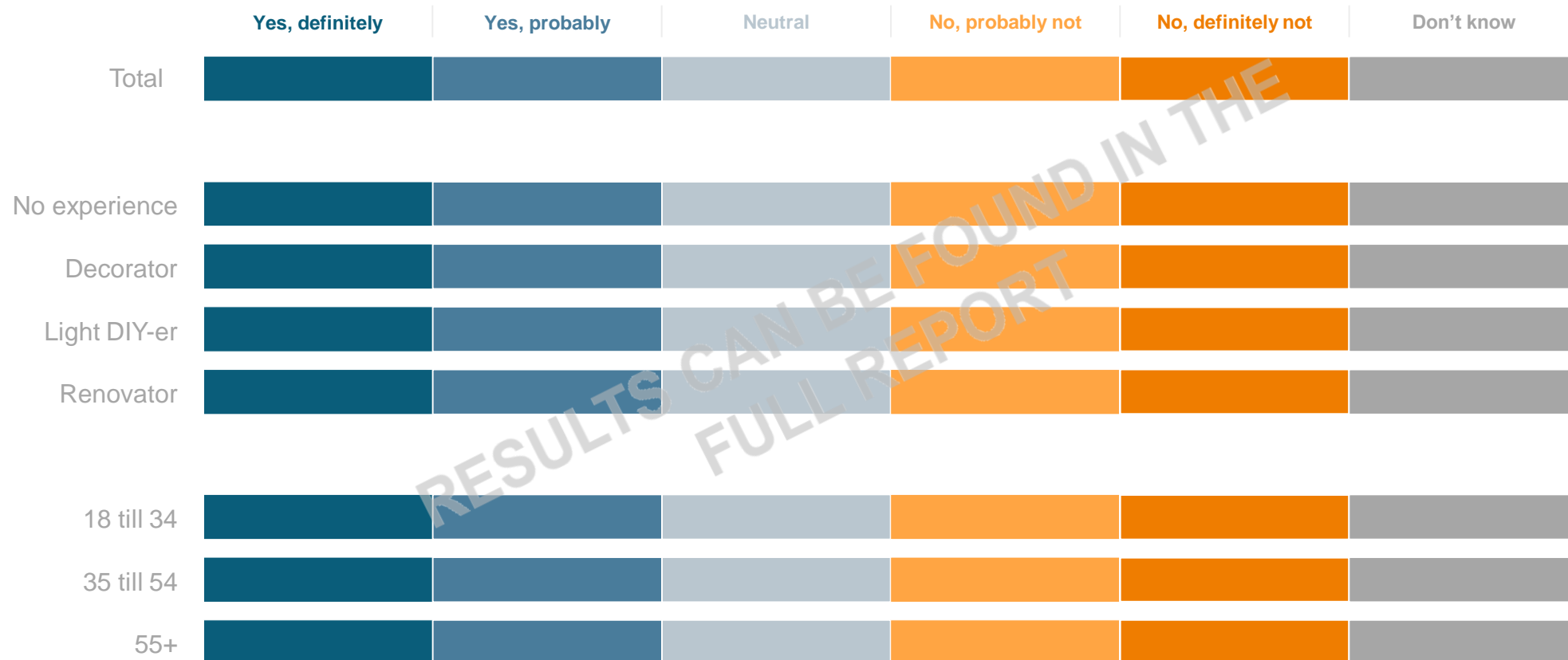




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## Plans in the next 30 days

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



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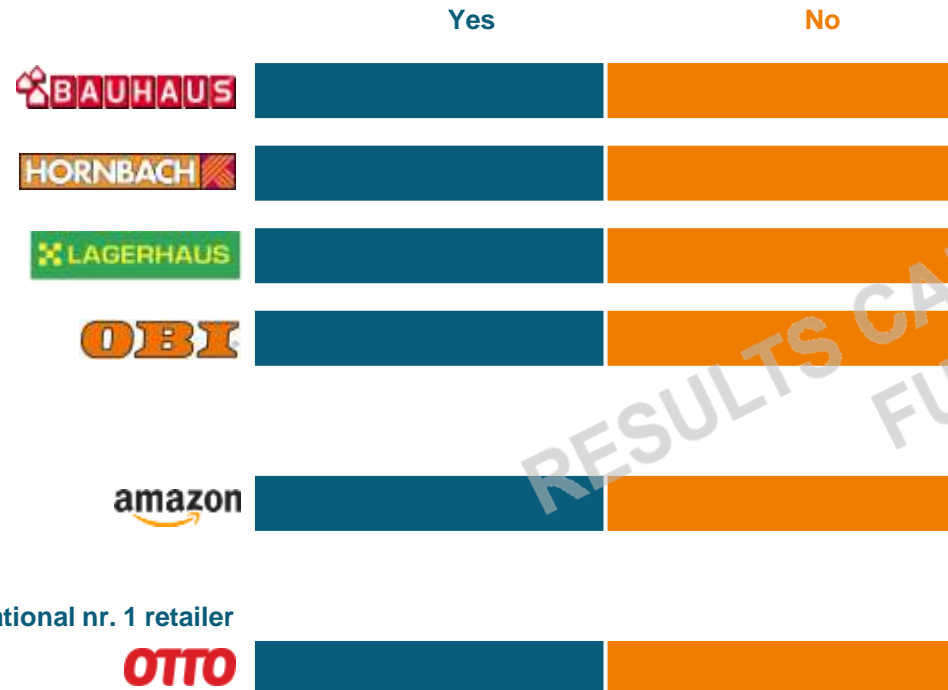
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# AUSTRIA

## Online purchases

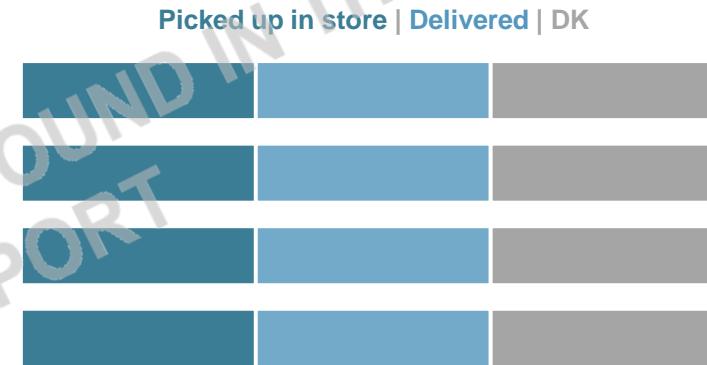
Have you purchased anything online at the following online stores during the past 6 months?



N=599

## Pick-up or delivery

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



N=141

# AUSTRIA

## Online purchases

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



Bauhaus | Hornbach | Lagerhaus | OBI | Amazon | Otto

The shopping experience in general

Navigation on the website / easy to find  
the product I needed

Advice on the website/product information

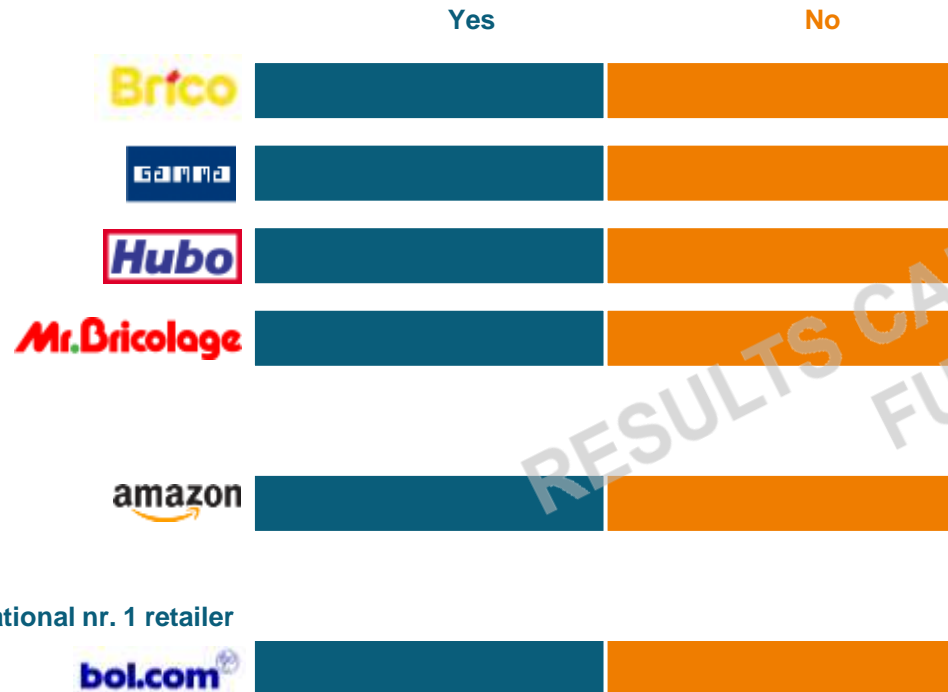
Delivery time / pick-up time

Communication about the order

# BELGIUM

## Online purchases

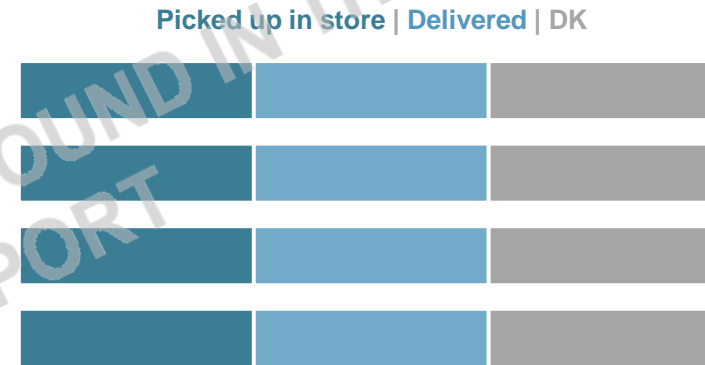
Have you purchased anything online at the following online stores during the past 6 months?



N=599

## Pick-up or delivery

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



N=155

# BELGIUM

## Online purchases

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



Brico | Gamma | Hubo | MrBricolage | Amazon | Bol.com

The shopping experience in general

Navigation on the website / easy to find  
the product I needed

Advice on the website/product information

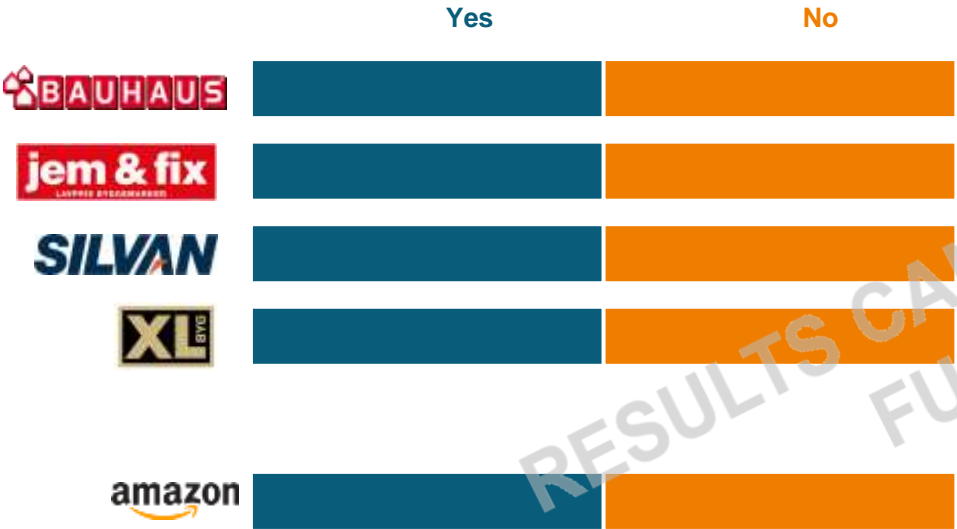
Delivery time / pick-up time

Communication about the order

# DENMARK

## Online purchases

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

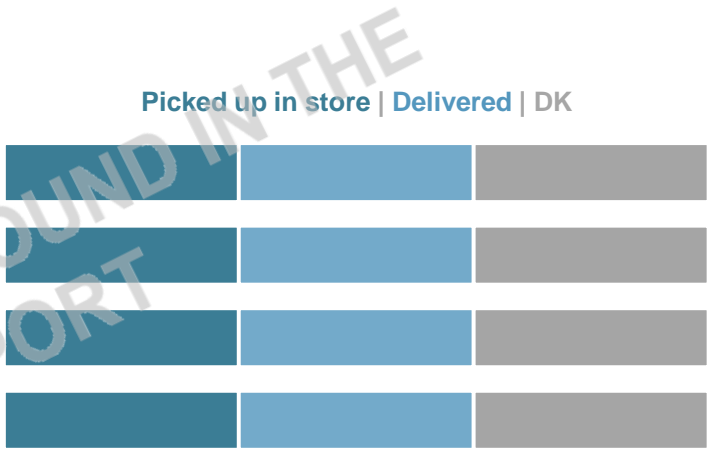


## National nr. 1 retailer



## Pick-up or delivery

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



# DENMARK

## Online purchases

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



Bauhaus | jem&fix | Silvan | XL-BYGG | Amazon | Harald Nyborg

The shopping experience in general

Navigation on the website / easy to find  
the product I needed

Advice on the website/product information

Delivery time / pick-up time

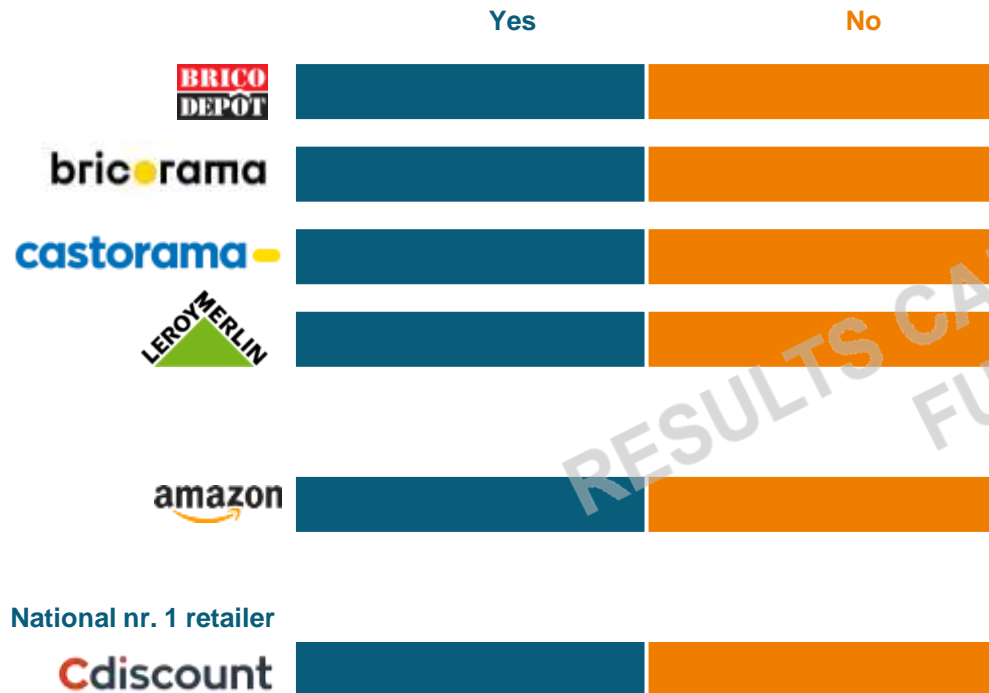
Communication about the order



# FRANCE

## Online purchases

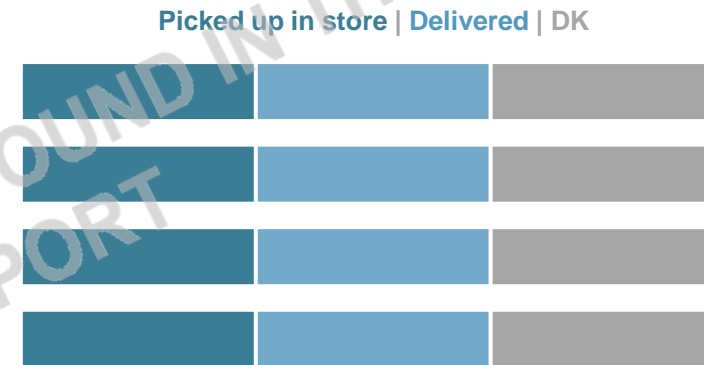
Have you purchased anything online at the following online stores during the past 6 months?



N=602

## Pick-up or delivery

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



N=175

# FRANCE

## Online purchases

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



BricoDepot | Bricorama | Castorama | LeroyMerlin | Amazon | Cdiscount

The shopping experience in general

Navigation on the website / easy to find  
the product I needed

Advice on the website/product information

Delivery time / pick-up time

Communication about the order

# GERMANY

## Online purchases

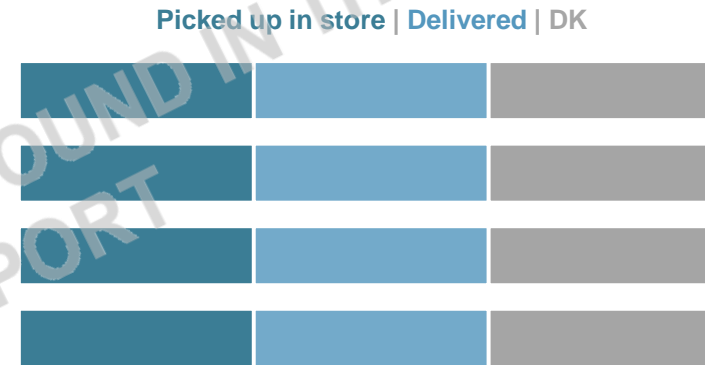
Have you purchased anything online at the following online stores during the past 6 months?



N=606

## Pick-up or delivery

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



N=142

# GERMANY

## Online purchases

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



Bauhaus | Hornbach | OBI | Toom | Amazon | Otto

The shopping experience in general

Navigation on the website / easy to find  
the product I needed

Advice on the website/product information

Delivery time / pick-up time

Communication about the order

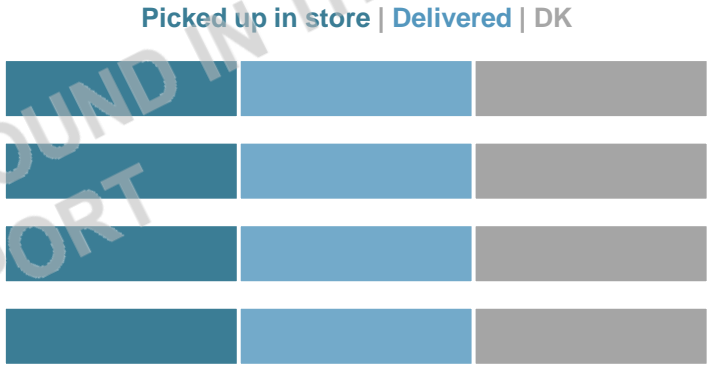
Online purchases

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



Pick-up or delivery

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



## Online purchases

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



Bricocenter | Bricioio | LeroyMerlin | OBI | Amazon | Privalia

The shopping experience in general

Navigation on the website / easy to find  
the product I needed

Advice on the website/product information

Delivery time / pick-up time

Communication about the order

# NETHERLAND

## Online purchases

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



Yes

No



National nr. 1 retailer



N=600

## Pick-up or delivery

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

Picked up in store | Delivered | DK



N=148

# NETHERLAND

## Online purchases

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



Gamma | Hornbach | Karwei | Praxis | Amazon | Bol.com

The shopping experience in general

Navigation on the website / easy to find  
the product I needed

Advice on the website/product information

Delivery time / pick-up time

Communication about the order



# POLAND

## Online purchases

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



Yes

No

castorama



LEROY MERLIN



psb MRÓWKA



OBI



amazon



National nr. 1 retailer

allegro



N=599

## Pick-up or delivery

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

Picked up in store | Delivered | DK



N=222

Online purchases

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



Castorama | LeroyMerlin | Mrówka | OBI | Amazon | Allegro

The shopping experience in general \_\_\_\_\_

Navigation on the website / easy to find  
the product I needed \_\_\_\_\_

Advice on the website/product information \_\_\_\_\_

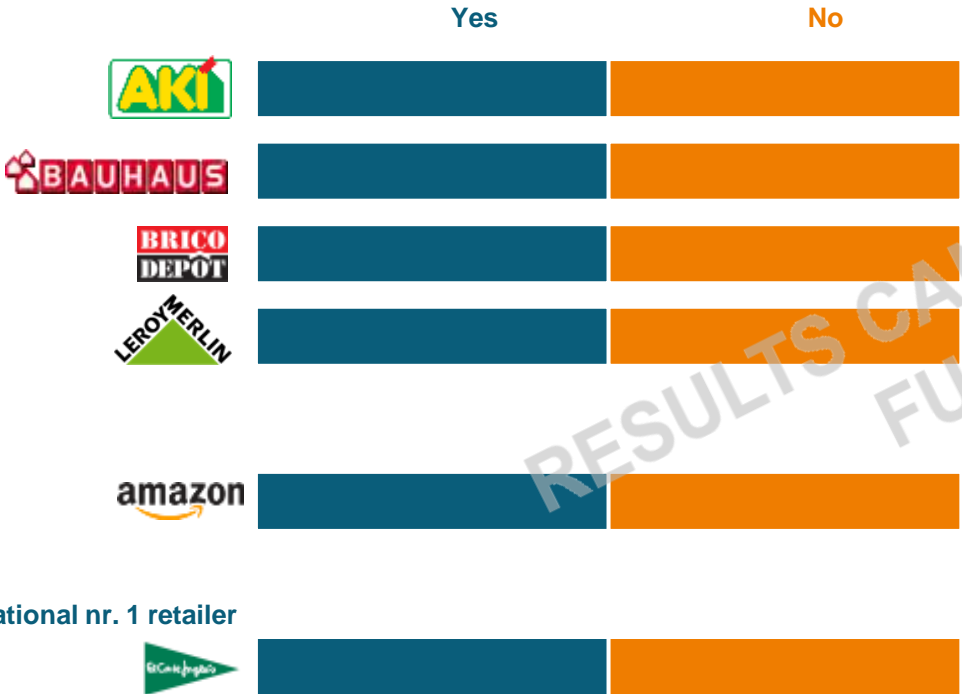
Delivery time / pick-up time \_\_\_\_\_

Communication about the order \_\_\_\_\_

RESULTS CAN BE FOUND IN THE  
FULL REPORT

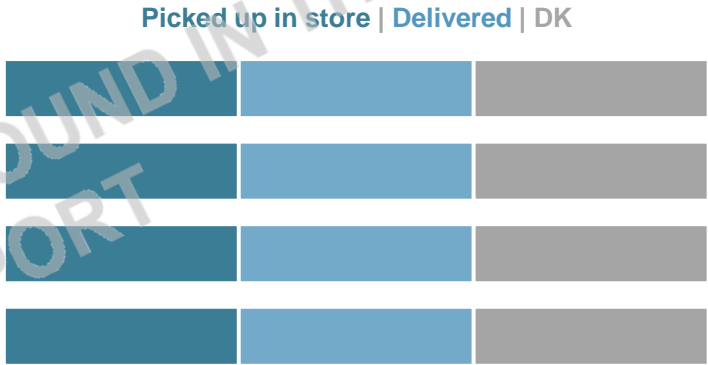
Online purchases

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



Pick-up or delivery

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



Online purchases

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



Bauhaus | BricoDepot | LeroyMerlin | Amazon | El Corte Inglés

The shopping experience in general \_\_\_\_\_

Navigation on the website / easy to find  
the product I needed \_\_\_\_\_

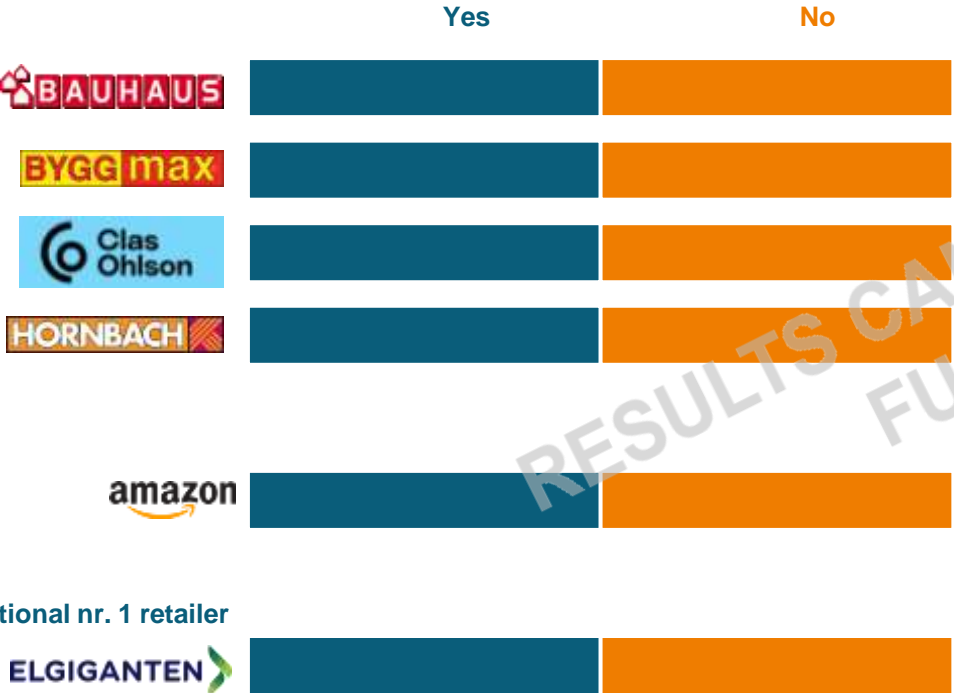
Advice on the website/product information \_\_\_\_\_

Delivery time / pick-up time \_\_\_\_\_

Communication about the order \_\_\_\_\_

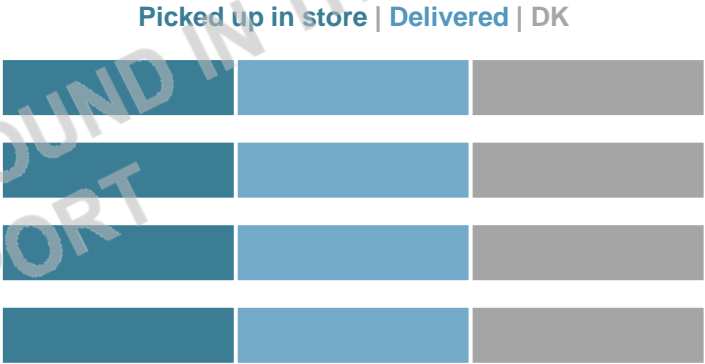
Online purchases

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



Pick-up or delivery

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



# SWEDEN

## Online purchases

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



Bauhaus | Bygghuset | ClasOhlson | Hornbach | Amazon | Elgiganten

The shopping experience in general

Navigation on the website / easy to find  
the product I needed

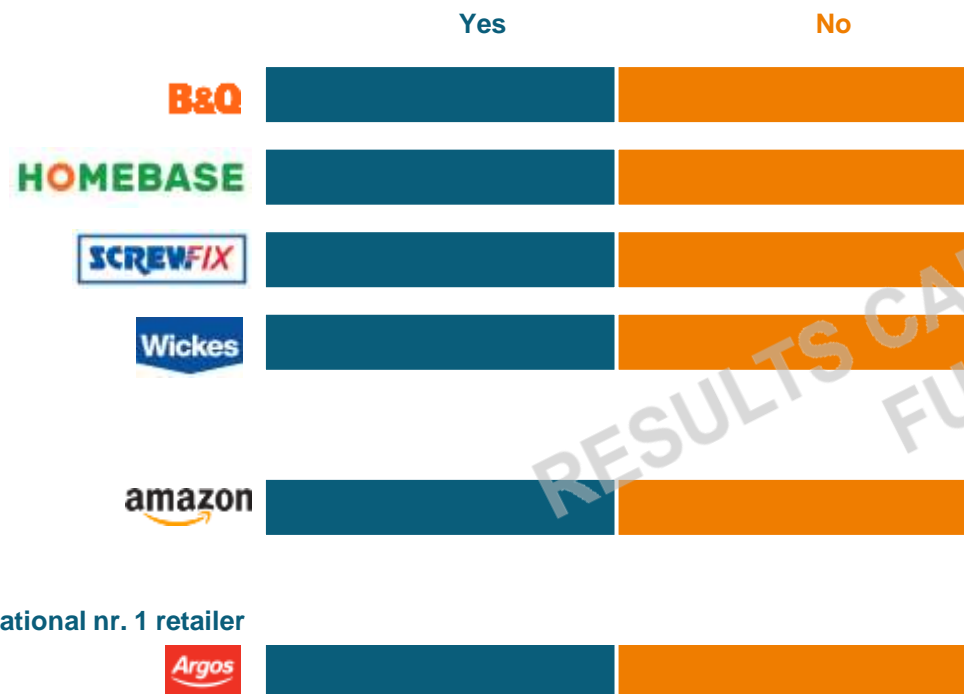
Advice on the website/product information

Delivery time / pick-up time

Communication about the order

### Online purchases

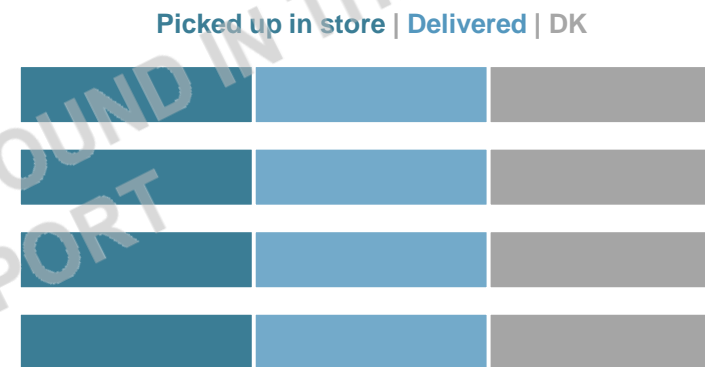
Have you purchased anything online at the following online stores during the past 6 months?



N=596

### Pick-up or delivery

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



N=209

### Online purchases

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



B&Q | Homebase | Screwfix | Wickes | Amazon | Argos

The shopping experience in general

Navigation on the website / easy to find  
the product I needed

Advice on the website/product information

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# 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

Male	Female		18-34	35-54	55+
48%	52%	Austria	26%	37%	37%
48%	51%	Belgium	27%	36%	37%
49%	51%	Denmark	26%	35%	39%
48%	52%	France	26%	35%	39%
49%	51%	Germany	24%	36%	40%
48%	52%	Italy	23%	37%	40%
49%	51%	Netherlands	26%	37%	37%
48%	52%	Poland	33%	33%	34%
49%	51%	Spain	26%	39%	35%
50%	50%	Sweden	27%	33%	41%
49%	51%	UK	29%	35%	36%
[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)						

# USP Marketing Consultancy

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