



European Home Improvement Monitor Q2 2025

Purchase Channels and Online Buying

About European Home Improvement Monitor

RESEARCH OBJECTIVE

To track behaviour and trends in the European home improvement market, conducted 4 times a year with 6,600 online interviews per quarter across 11 major European markets.

THE RESEARCH TOPICS

Base part: European home improvement market developments, including product category penetration, spending, and brand selection timing.

QUARTERLY THEME PART TOPIC IN 2025:

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

PROJECT TEAM



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COUNTRY SCOPE



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

Insights are provided for **11** European countries

THE TIMELINE

Report Q1

May
2025

Report Q2

August
2025

Report Q3

November
2025

Report Q4

February
2026

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Home Improvement Tracker

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



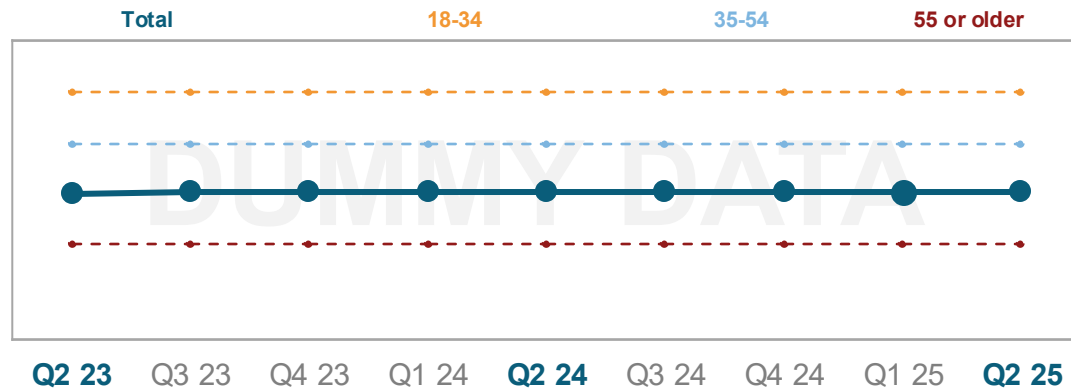
- Share of households that have done a home improvement job
- European spending on labour and material
- European spending on products/material and labour

Respondents were asked:

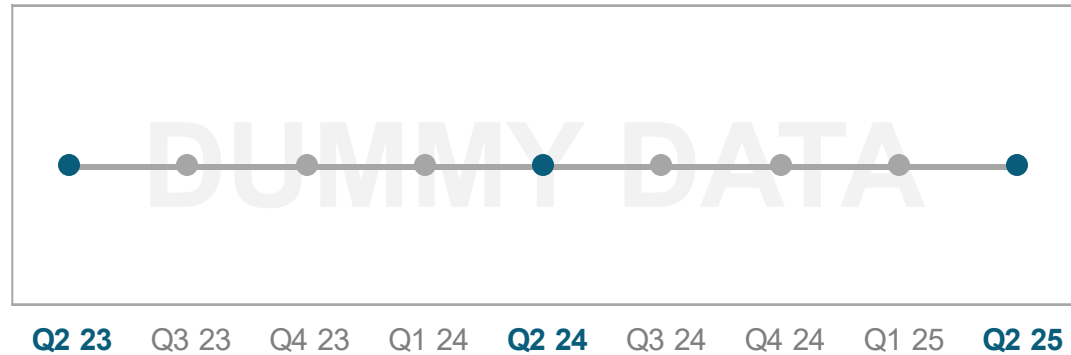
- To what degree do you expect to **spend more or less money** on home improvement **in April – June/in the next 12 months** compared to the same period last year?
- Do you feel this month is a **good or bad time** to start a project **over/under €5.000** for home improvement, repair or maintenance?
- 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 **April – June/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?

HOME IMPROVEMENT: ACTIVITY & SPENDING

Share of Households Doing Home Improvement Jobs



European Home Improvement Spending



Q: Have any changes been made to the inside/ outside of your home in the last 3 months?

Q: Could you give an estimation on your spending on home improvement in the past 3 months?

Spending includes only home improvement jobs costing less than €10K.

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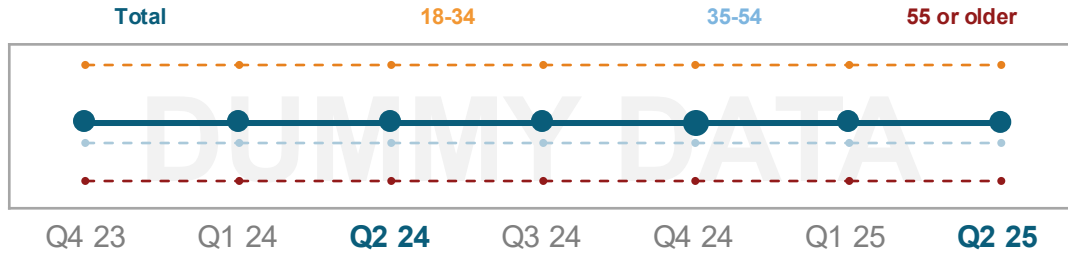
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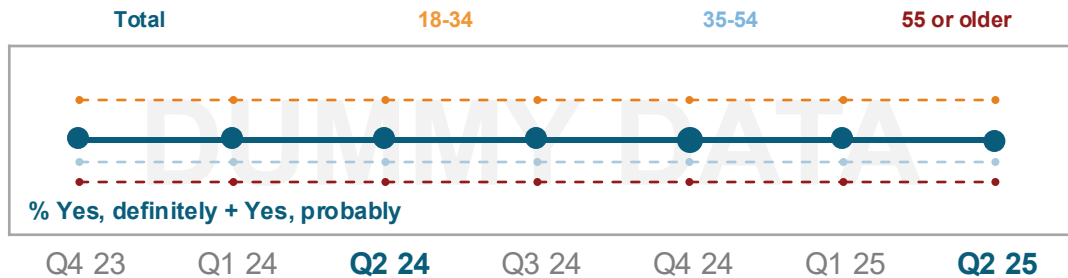
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HOME IMPROVEMENT: FORECAST

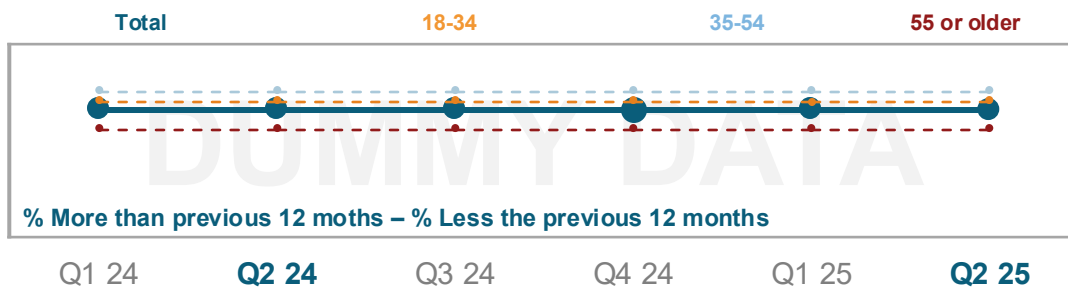
Moving Plans In Next 12 Months



Plans To Start A Home Improvement In The Next 30 Days



Balance of Expected Spending – Next 12 Months



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Q: Do you have plans to move in the next 12 months?

Q: Are you planning to start a home improvement project in the next 30 days?

*More data available in the appendix

Theme questions

In this chapter, we take a deeper dive into the purchase channels, as well as online buying behaviour. 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, power tools or flowers and plants**?
- Have you purchased any products **online** via **Amazon** or the **national No.1 e-tailer** in the **past 12 months**?
- Have you purchased **any home improvement products** via **Amazon** or the **national No.1 e-tailer** in the **past 12 months**?
- Have you purchased anything online at the following **online stores** during **the past 6 months**?
- How important are **customer reviews/ratings** in your decision to purchase home improvement products **online**?
- **Where** would you prefer to buy **home improvement products, paint, bathroom products, power tools or flowers and plants**?
- Which **online platforms** do you expect to use for **inspiration** when you want to **renovate your living room, bathroom or kitchen**?
- **Which** of the following product categories have you **purchased online in the past 12 months**?
- For the items you purchased online, did you **check the product in a store** beforehand?
- When buying home improvement products online, which of the following **steps** do you usually take **before making a decision**?
- When you purchase home improvement products online, what makes you **confident in the product's quality**?
- When buying products online, do you prefer **well-known brands (A-brands)** or **private label/store brands**?
- What **digital services** would **improve** your online **home improvement shopping experience**?
- Which of the following **features** would help you choose the **right paint product online**?
- How did **price increases** for DIY products in the past 12 months **affect your buying behavior**?
- What makes you **trust a DIY retailer or brand**?

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Top of mind website

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

	AT	BE	DK	FR	DE	IT	NL	PL	ES	SE	UK
Home improvement products	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%
Paint	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%
Bathroom products	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%
Power tools	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%
Flowers and plants	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%	Website x%

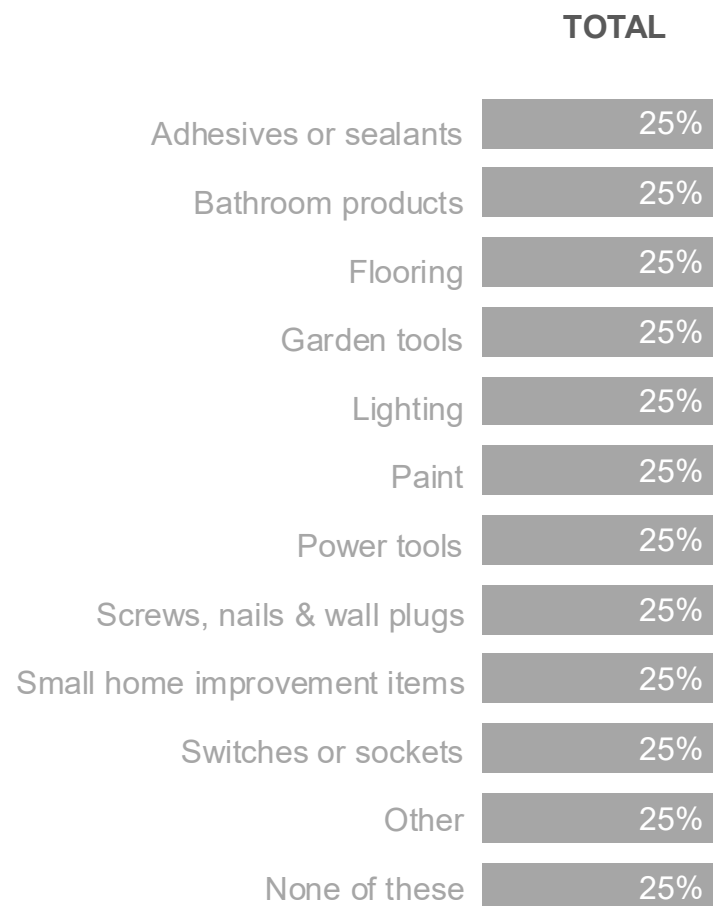
Base: N= 6,371, all respondents

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Online purchases

Which of the following product categories have you purchased online in the past 12 months?



Base: N= 6,609, all respondents

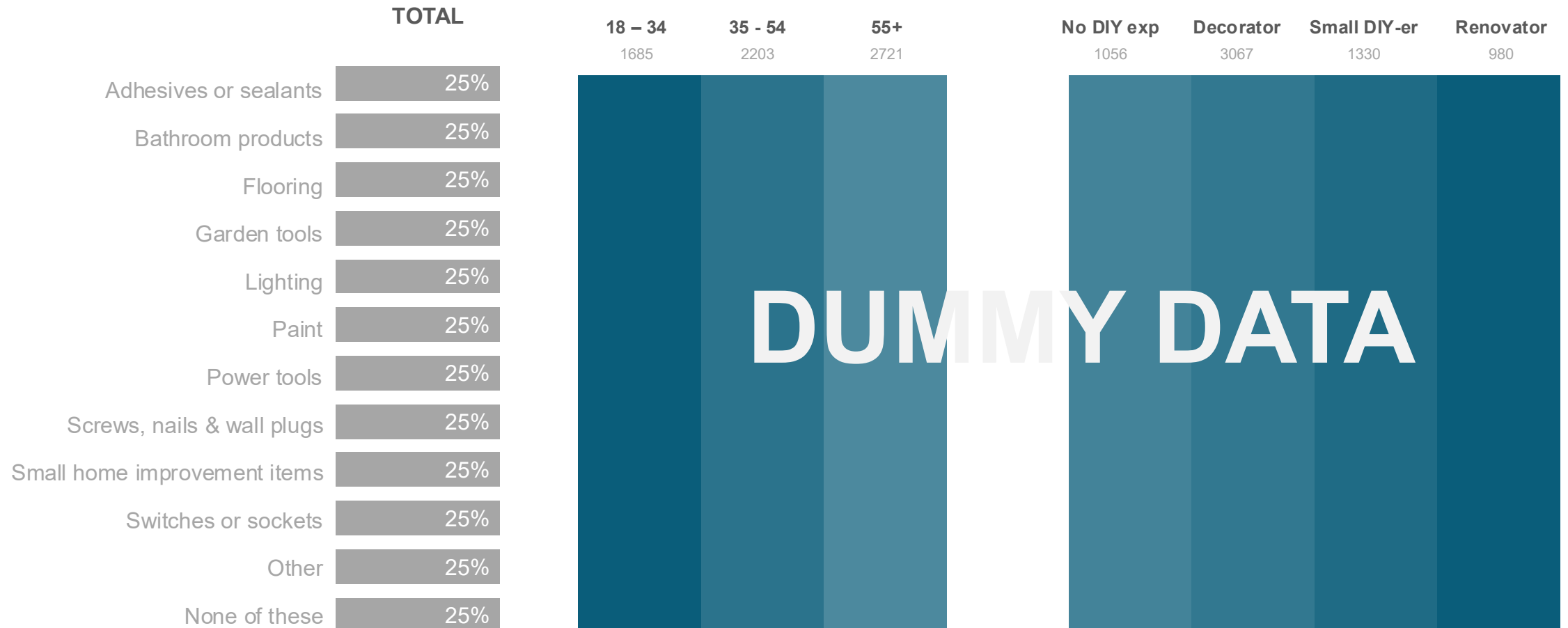
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Online purchases

Which of the following product categories have you purchased online in the past 12 months?



Base: N= 6,609, all respondents

AUSTRIA

Online purchases

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



	Yes	No
BAUHAUS	50%	50%
HORNBACH	50%	50%
LAGERHAUS	50%	50%
OBI	50%	50%
amazon	50%	50%
OTTO	50%	50%

N = 601

Online purchasing behaviour

When buying home improvement products online, which of the following steps do you usually take before making a decision?

Add product to cart and wait	50%
Check in-store availability before buying	50%
Check retailer return policies	50%
Compare prices across websites	50%
Look for product demonstration videos	50%
Read product reviews	50%
Search for discount codes	50%

N = xx

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Home Improvement per Category

In this chapter, we dive into questions about specific product categories, as mentioned in the previous slide:



- Share of households that have done a **home improvement job per product category** on a **quarterly level**
- **Trend of gathering information online** per product category
- Who **determined the brand** of the product – you or the professional?
- What **brand** of <product category> did you buy?
- Further product specific questions

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)								

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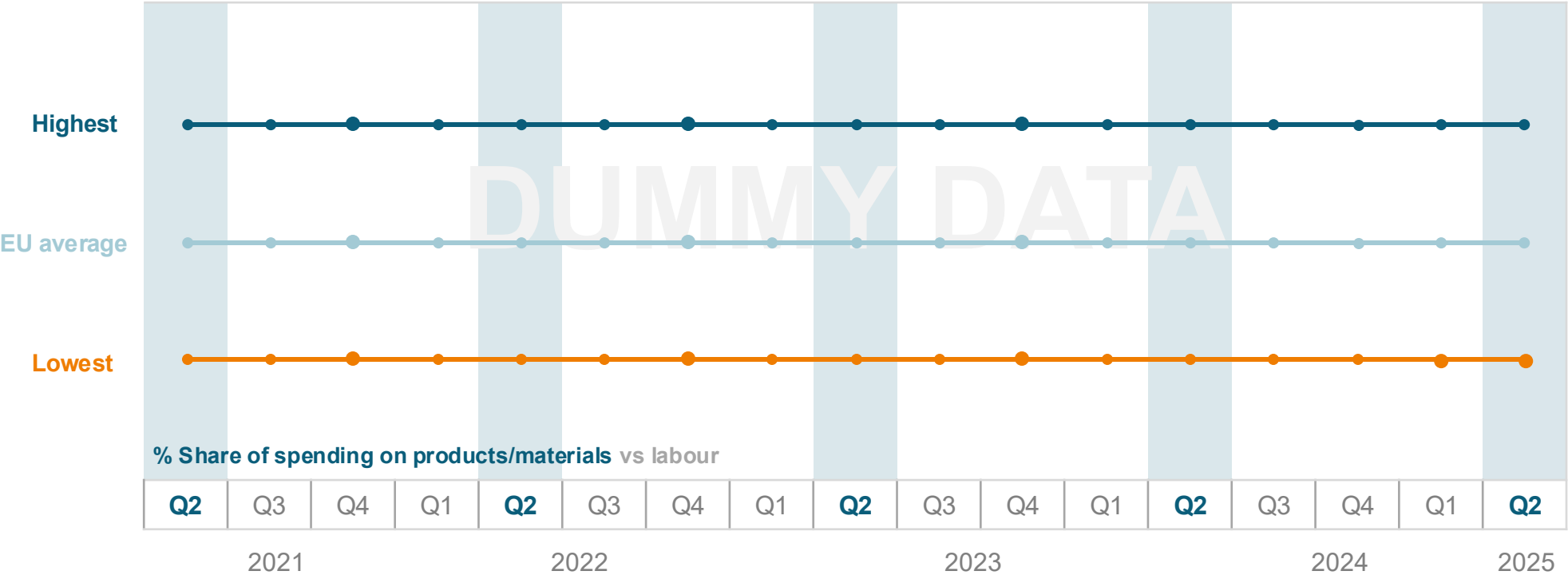
Home Improvement per Category

Appendix



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European spending on products/material and labour



AT	x%
BE	x%
DK	x%
FR	x%
DE	x%
IT	x%
Total	x%
NL	x%
PL	x%
ES	x%
SE	x%
UK	x%
Q2 2025	

USP Marketing Consultancy

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