



PURCHASE BEHAVIOUR & CHANNEL MONITOR (PCM)

The missing link between customer decision making and actual purchase behaviour

How customers buy is becoming more complex and harder to control

Construction and installation markets are undergoing a shift in purchase behaviour and channel dynamics.

Wholesalers must navigate:

- Increasing competition from direct manufacturer sales and online channels
- Changing purchasing behaviour across installers, contractors and DIY customers
- Growing price transparency and margin pressure
- Fragmented, multi-channel purchasing journeys
- Rising expectations for speed, availability and service

The traditional role of the wholesaler is being challenged.

Decoding the dynamic path to purchase

Purchase behaviour is becoming increasingly dynamic:

- Switching between wholesalers, retail and direct channels
- Comparing prices and availability across multiple sources
- Combining channels within the same project
- Behaving differently across professions and product categories

But how well do you really understand:

- Where you win and where you lose customers?
- Which segments are most likely to switch channels?
- How your role compares to manufacturers and digital platforms?

**The key question is no longer “ WHERE do customers buy? ”,
but “WHY THEY CHOOSE OR LEAVE your channel? ”**



Purchase Behaviour & Channel Monitor (PCM)

Cross-target insight into how customers choose purchase channels across segments



SCOPE

- Cross-target perspective: installers, contractors and homeowners
- Built on USP's established European monitors, enriched with a dedicated purchase behaviour layer
- Multi-country coverage with comparable insights



TOPICS IN FOCUS

- Channel usage
- Multi-channel purchasing behaviour
- Drivers of channel choice
- Influence of wholesalers, manufacturers and digital sources
- Evolving purchasing behaviour under emerging trends



DELIVERABLES

- Strategic report with key insights and implications
- Expert presentation and discussion session
- available: September/October 2026



INVESTMENT (consolidated report) = **3.000 €**



PCM 2026: Bringing clarity to how purchase decisions translate into real buying behaviour



Combines insights across INSTALLERS, CONTRACTORS AND HOMEOWNERS



Focuses on where and how DECISIONS TURN INTO PURCHASES



Captures CHANNEL DYNAMICS not visible in sales data



Enables CROSS-TARGET AND CROSS-CATEGORY comparison



Provides a clear view of YOUR ROLE AND POSITION across channels

Purchase Behaviour & Channel Monitor (PCM)

What the data reveals:

- ✓ Brand loyalty and channel loyalty are not the same
- ✓ Direct purchasing from manufacturers is growing unevenly across markets and professions
- ✓ In some markets, wholesalers already outweigh manufacturers as a key influence at purchase
- ✓ Private label pressure is reshaping category dynamics
- ✓ New digital touchpoints are influencing decisions beyond traditional channels



Why wholesalers choose PCM

Stronger insight for better market positioning

- ✓ Understand where you win or lose customers across channels
- ✓ Identify segments most at risk of switching
- ✓ Benchmark your position vs manufacturers and digital competitors
- ✓ Strengthen your value proposition beyond price
- ✓ Anticipate channel shifts and defend your market role

Your trusted EMIM contacts:

Let's explore how EMIM can support your business



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Connect the full construction decision chain

USP's European Construction Decision Intelligence Platform



- **European Architectural Barometer**

- **Contractor Monitor**

- **Handymen Insight monitor**

- **Painter Insight monitor**

- **European Mechanical Installation Monitor**

- **European Electrical Installation Monitor**

PURCHASE BEHAVIOUR & CHANNEL MONITOR

- **European Home Improvement Monitor**

Client Testimonials

What clients value in our market monitors

walraven

Johan Gijsman

Group Director Marketing, Walraven Holding

We have been using European Mechanical Installation Monitor issued by USP for many years for the planning of our strategic initiatives.

:hager

Céline Pineau

Consumer insight researcher at Hager

USP is professional, responsive, didactic, and voluntary. It was easy to exchange my thoughts with them.

Vaillant

Hardy Jaeschke

Senior Manager Market Research

The USP reports help us better understand different B2B target groups, better assess their business situations, and enrich our range of knowledge enormously.

ROTHENBERGER
Special technologies in metal

Dr. Christian Heine

CEO, Rothenberger AG

The European Mechanical Installation Monitor gives us great insights and these insights support our strategic decision.

■ GEBERIT

Renato Di Rubbo

Head of global Marketing Piping systems at Geberit

We value USP for the highly competent consulting, the pragmatic and uncomplicated process, and the high quality of its inputs.

Schneider
Electric

Miryam Salvador

Global Channel Director

Their specialized insights into construction and installation markets enable us to make informed go-to-market decisions based on factual data. Their customer-centric approach helps us put customer needs at the centre of our decisions.



Trusted by industry leaders

Supporting growth across construction, installation and home improvement

Construction



Installation & Home Improvement



About USP Marketing Consultancy

Trusted insights for over 30 years



30+ years of international market research and consultancy experience



Specialised in construction, installation, DIY and real estate



Active in 40+ countries annually



Focused on trends, market developments and actionable insights



A strategic partner, not just a data provider

At USP, we deliver the insights you can truly build on.

Head office



The Netherlands – Rotterdam

Branche office



Croatia – Zagreb

Subsidiary



Germany – Düsseldorf



USP Marketing Consultancy

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