

The GfK logo is displayed in white text on a dark orange square background.

GfK-Living.com

A glowing, cracked cube with light rays emanating from it, set against a dark orange background.

International fediyma DIY ConsumerStudy 2010 by GfK  
Facts, trends and expectations  
for the DIY- and Gardening sector

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## GfK Group: Growth from Knowledge



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### Turnover

1,2 bn. Euro in 2009

### Growth

average growth of 15 % per year within the last 10 years

### Position

- No. 1 market research agency in Germany
- No. 4 market research agency in Europe and the world
- GfK Living & Retail is the leader in Consumer Knowledge within the Home Improvement & Nonfood market

### People

- Current total of more than 10.000 employees
- around 80% are based outside Germany



Within GfK Group, the profit center GfK Living & Retail is focusing on fact based consultancy for the markets around home and garden

## GfK Living & Retail

Continuous Consumer Tracking within the following markets

Building & Refurbishment	DIY & Garden	Home & Furnishing	Electric Appliances & Hometec
<ul style="list-style-type: none"> <li>§ Building / construction</li> <li>§ Refurbishment</li> <li>§ Sanitary fittings / sanitary ware</li> <li>§ Components (windows, doors, fittings, etc.)</li> <li>§ Building material/chemistry</li> <li>§ Flooring</li> <li>§ Heating/air conditioning</li> <li>§ Energy (oil, gas, electricity, photovoltaic, solar, etc.)</li> <li>§ Handcraft</li> <li>§ etc.</li> </ul>	<ul style="list-style-type: none"> <li>§ DIY stores product lines (tools, power tools)</li> <li>§ Garden product lines (garden hard goods, garden tools)</li> <li>§ barbecue / grill</li> <li>§ Watering</li> <li>§ Lawnmower</li> <li>§ Power saws</li> <li>§ Garden furniture</li> <li>§ Garden ponds</li> <li>§ Plants</li> </ul>	<ul style="list-style-type: none"> <li>§ Furniture (living room, bedroom furniture, upholstery, bathroom furniture etc.)</li> <li>§ Kitchens</li> <li>§ Kitchen sinks</li> <li>§ Household products (cookware, cutlery, baking tins, etc.)</li> <li>§ Home textiles</li> <li>§ Decoration and accessories</li> <li>§ Mattresses and springs</li> <li>§ etc.</li> </ul>	<ul style="list-style-type: none"> <li>§ White goods/ MDA</li> <li>§ Small Domestic Appliances</li> <li>§ Consumer Electronics</li> <li>§ House and safety equipment</li> <li>§ Lighting</li> <li>§ Sports equipment</li> <li>§ etc.</li> </ul>

Individual, custom-made market analyses and fact based consultancy on national and international basis

More information: [www.gfk-living.com](http://www.gfk-living.com)

# International fediyma DIY Consumer Study 2010 by GfK Living & Retail

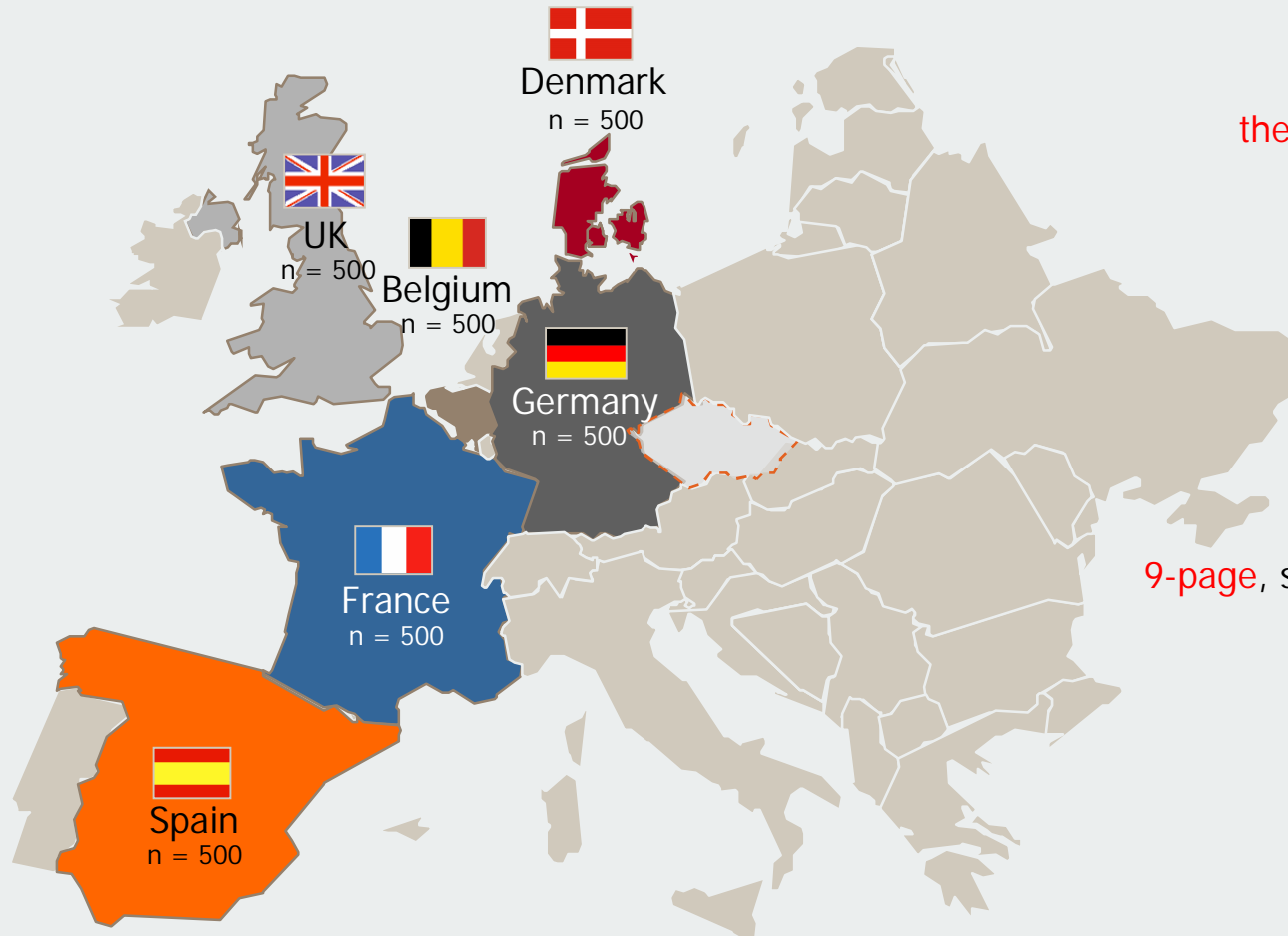
## Your benefits

4

- Analysis of all relevant information for the DIY-/Gardening branch regarding market, distribution, retailers and consumer insights.
- The study has been carried out on a representative basis for the respective countries.
- Possibility to carry out the study in additional countries that are relevant for you.
- Comparable results to prior studies fediyma (2005 & 2007) and GfK Living (2009) in relevant issues enables to identify central trends and developments.
- Focus on DIY and Gardening (no dilution of content that may occur when conducting a multi-topic or omnibus survey).
- Comparable cross-country analysis of all relevant market information.

## International fediyma DIY ConsumerStudy 2010 by GfK Living & Retail in (6+1) European countries

5



Target Group  
Persons who **mainly deal with the realization of renovation work** in a household drawn from country-representative household samples

Method  
Online-Survey  
in the respective countries

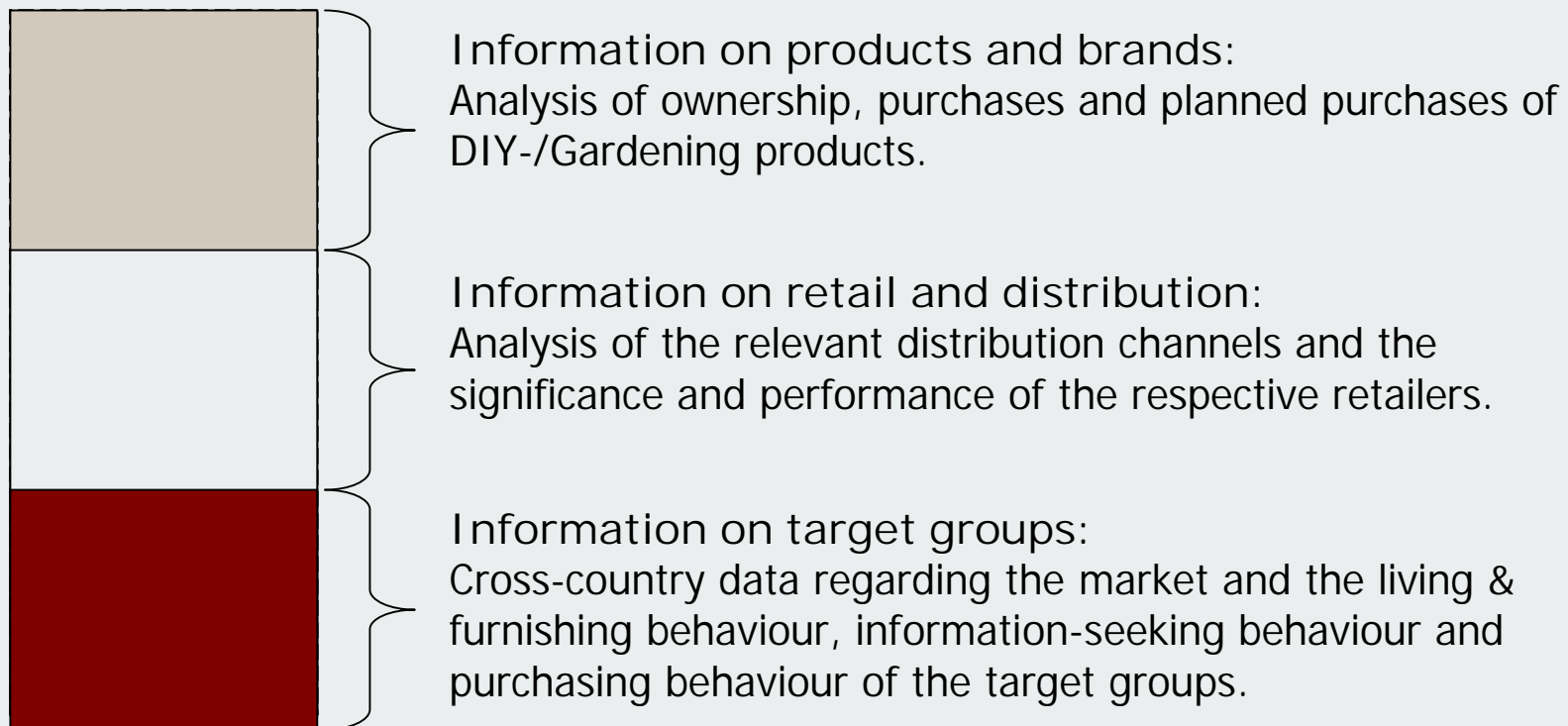
Outline/Length  
**9-page**, structured online questionnaire

Time of fieldwork  
April 2010

For single clients of GfK Living & Retail we included additional countries. Therefore the „Total“ shown in this report includes more than the 6 countries mentioned above. Ask us, if you are interested in receiving comparable knowledge about other countries.

## International fediyima DIY Consumer Study 2010 by GfK Living & Retail Structure

6



# International fediyima DIY Consumer Study 2010 by GfK Living & Retail

## Available results

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### International fediyima DIY Consumer Study 2010 by GfK Living & Retail

#### Results Overview

Speech of Oliver Schmitz  
(Division Manager, GfK Living & Retail)  
on the 1st European Home Improvement  
Forum 2010 in Vienna,  
June 10<sup>th</sup>/11<sup>th</sup> 2010

Starts from page 9!

Available For Free !

### International fediyima DIY Consumer Study 2010 by GfK Living & Retail

#### Complete Results Report

ca. 150 power point charts  
including key learnings and  
extensive management summary

Available for immediate delivery!

Euro 2.500,-- VAT excl.

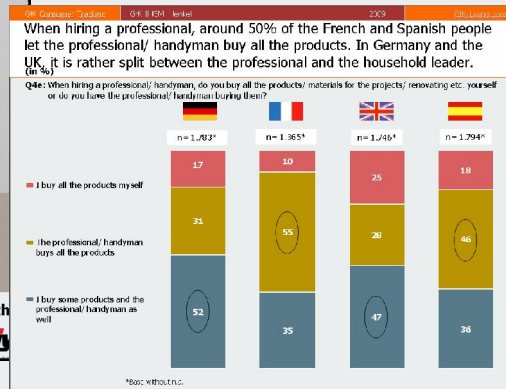
# Benchmark data and sources



## International GfK Home- & Garden Monitor

Standardised multinational study about home- and garden in 13 countries

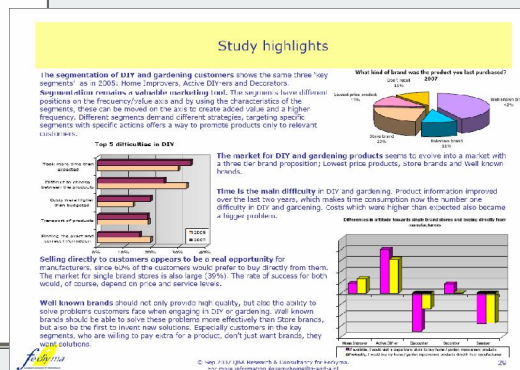
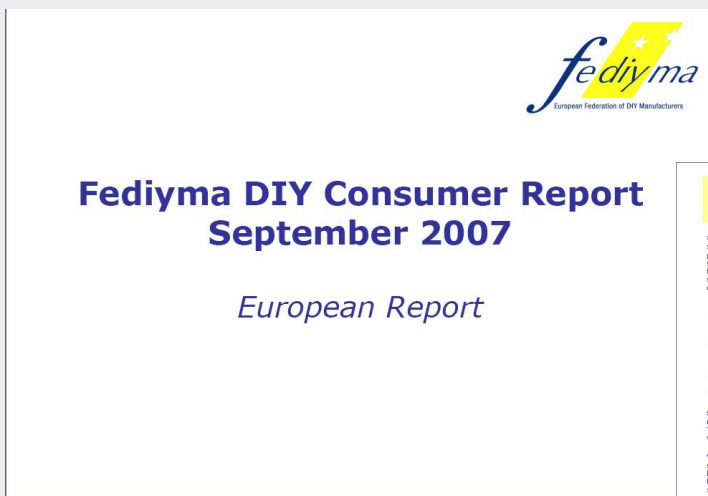
carried out by GfK Living & Retail in 2008



## Fediyma DIY Consumer Report

Multinational Study about consumer behaviour in the European market for DIY and Gardening

carried out by Fediyma in 2007



The GfK logo is located in the top-left corner of the slide. It consists of the letters 'GfK' in a white, sans-serif font, centered within a solid orange square. The background of the slide is a black and white checkerboard pattern.

# Facts:

Consequences of the crisis

## Key-Findings Facts



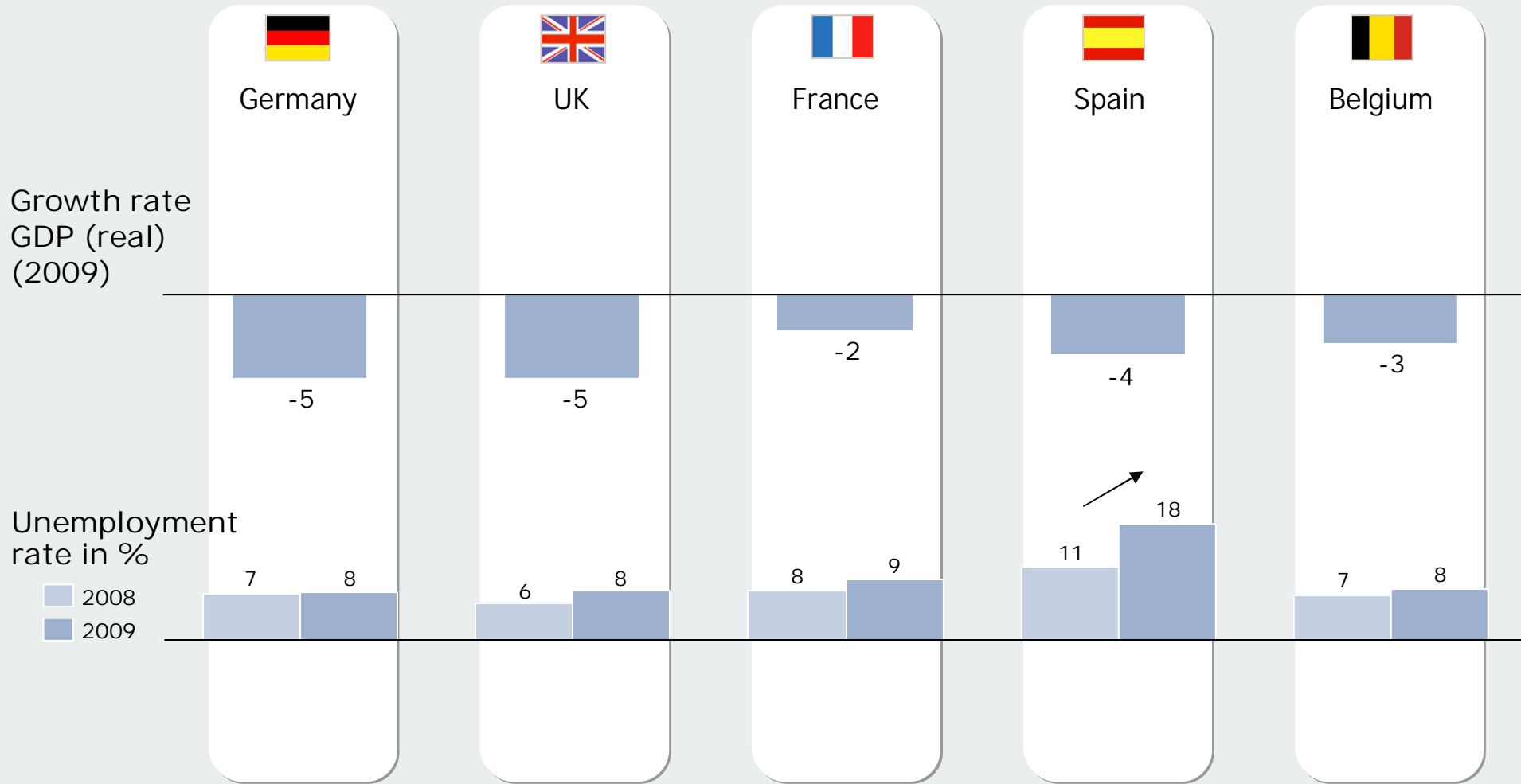
10

- § Most of the European countries had a **decreasing Gross Domestic Product** in 2009.
- § Therefore, all countries covered - especially Spain – were also suffering from an **increasing unemployment rate**.

# Review of economic indicators



Selected economic indicators of each country





## Key-Findings

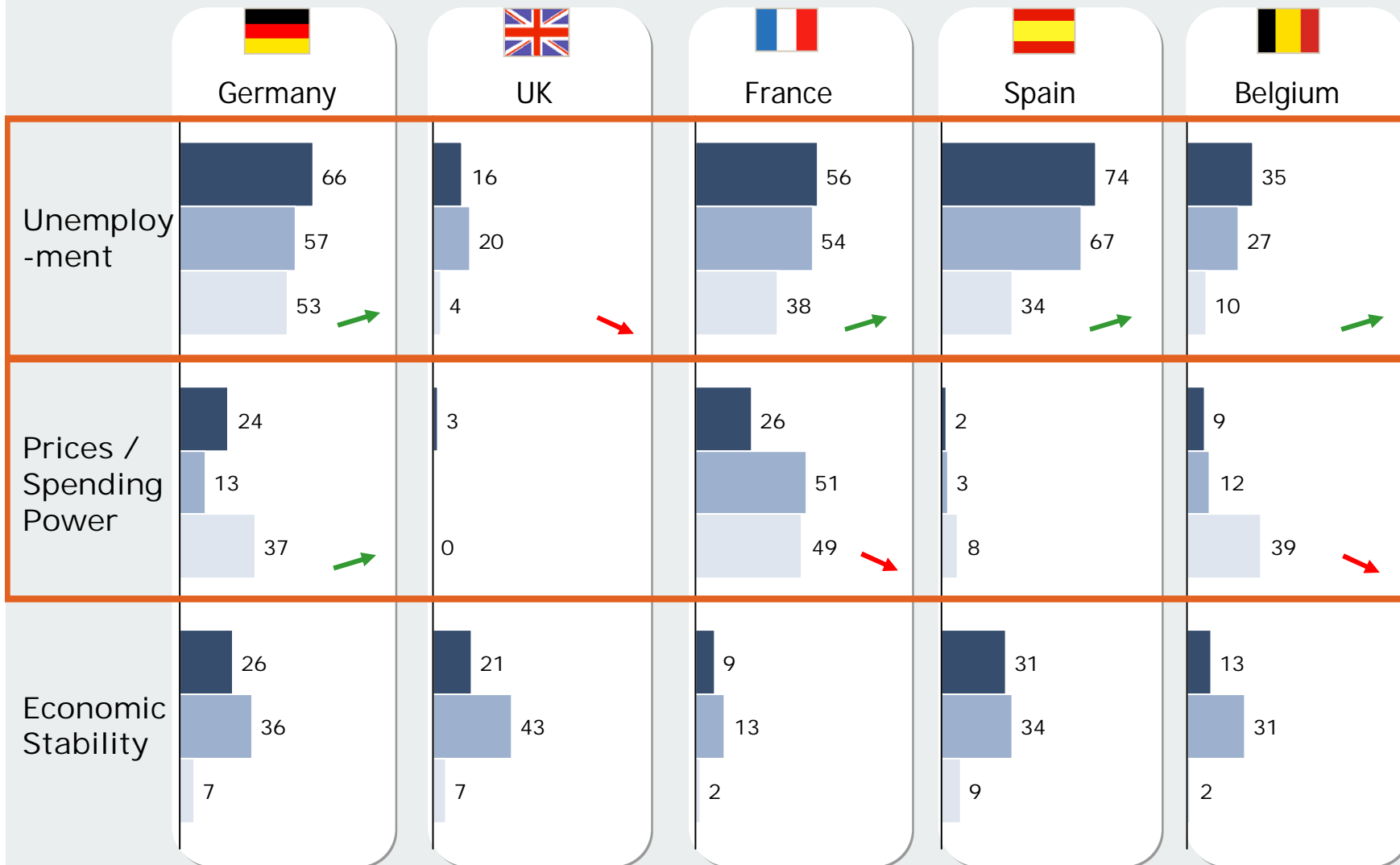
12

- § Most of the European countries had a decreasing Gross Domestic Product in 2009.
- § Therefore, all countries covered - especially Spain – were also suffering from an increasing unemployment rate.
- § This economic framework is causing some worries among end-consumers:
  - § especially in Spain, Germany and France many **people are worried about unemployment** (as we know from Germany, every unemployed person leads to another 2,5 persons who are afraid of losing their jobs).
  - § in Germany, the share of people who are **worried about the purchase** power has **nearly doubled** within one year.
  - § in addition, many people in Europe are **worried about the economic stability** of their country.

# Unemployment is still a major challenge in Europe, especially in Spain, Germany and France

The Top-3 challenges by Country comparison

2010 2009 2008



A close-up photograph of several gold bars stacked together. The bars are highly reflective and have a warm, golden glow. Some bars have small white identification tags attached to them with black numbers. The background is dark, making the gold bars stand out prominently.

GfK

# Potential:

Despite the crisis: homing is offering great potentials

## Key-Findings

15

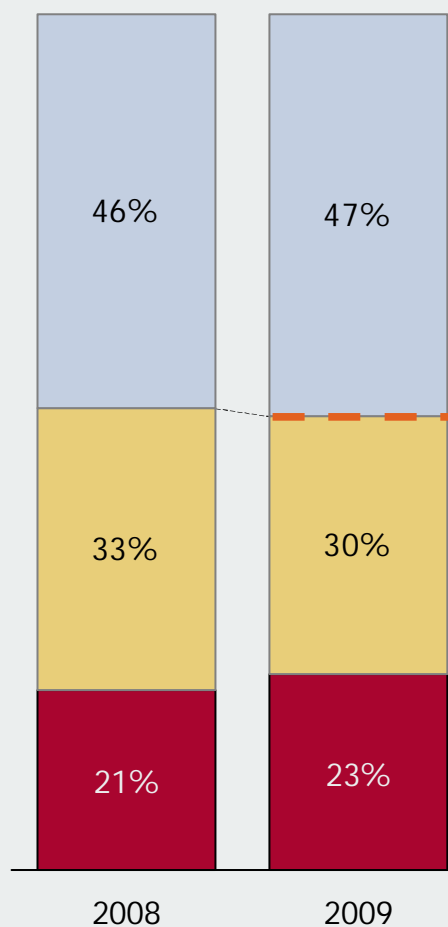
§ One of the reasons why **the market for home improvement is not that much affected** (and hopefully will be) by these circumstances is the fact that many consumers who are resistant of the crisis are driving the home improvement market.

# German analyses show: Many renovators are not or not severely affected by the crisis

Base: 2008 vs. 2009

Affected by crisis: Renovators

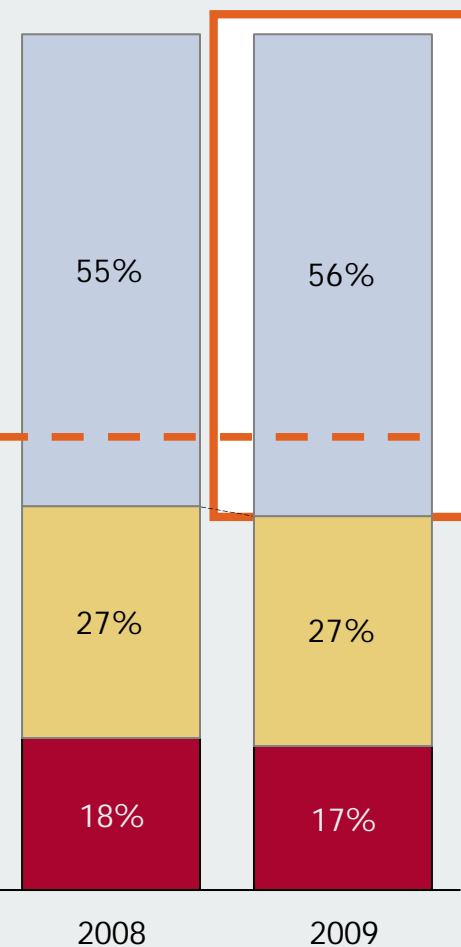
## Households in Germany\*



### Crisis consumer segments

- crisis resistant consumers
- crisis threatened consumers
- crisis affected consumers

## Renovators Total



\* Representative distribution of German households



## Key-Findings

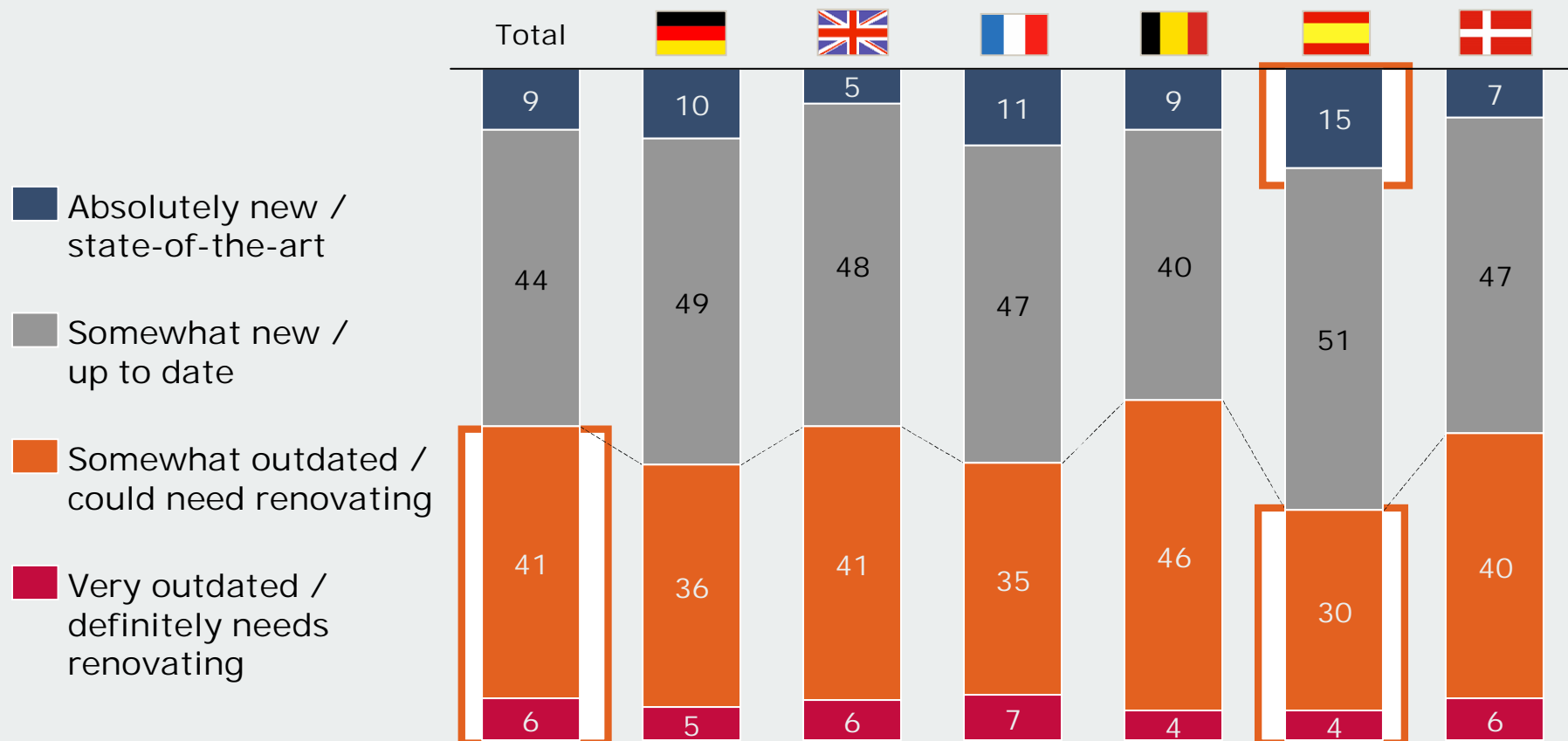
17

- § One of the reasons why the market for home improvement is not that much affected (and hopefully will be) by these circumstances is the fact that many consumers who are resistant of the crisis are driving the home improvement market.
- § Looking into the future, **there is still a great potential for further growth** in the renovation and home improvement market.
- § With the exception of Spain, which had the highest building completions 2008, around **50% of the houses do need renovation** in the eyes of end-consumers.

## Almost 50% of the houses are more or less outdated and need or definitely need to be renovated

Q2g: What condition would you say the house / flat in which you live is in? (in %)

18

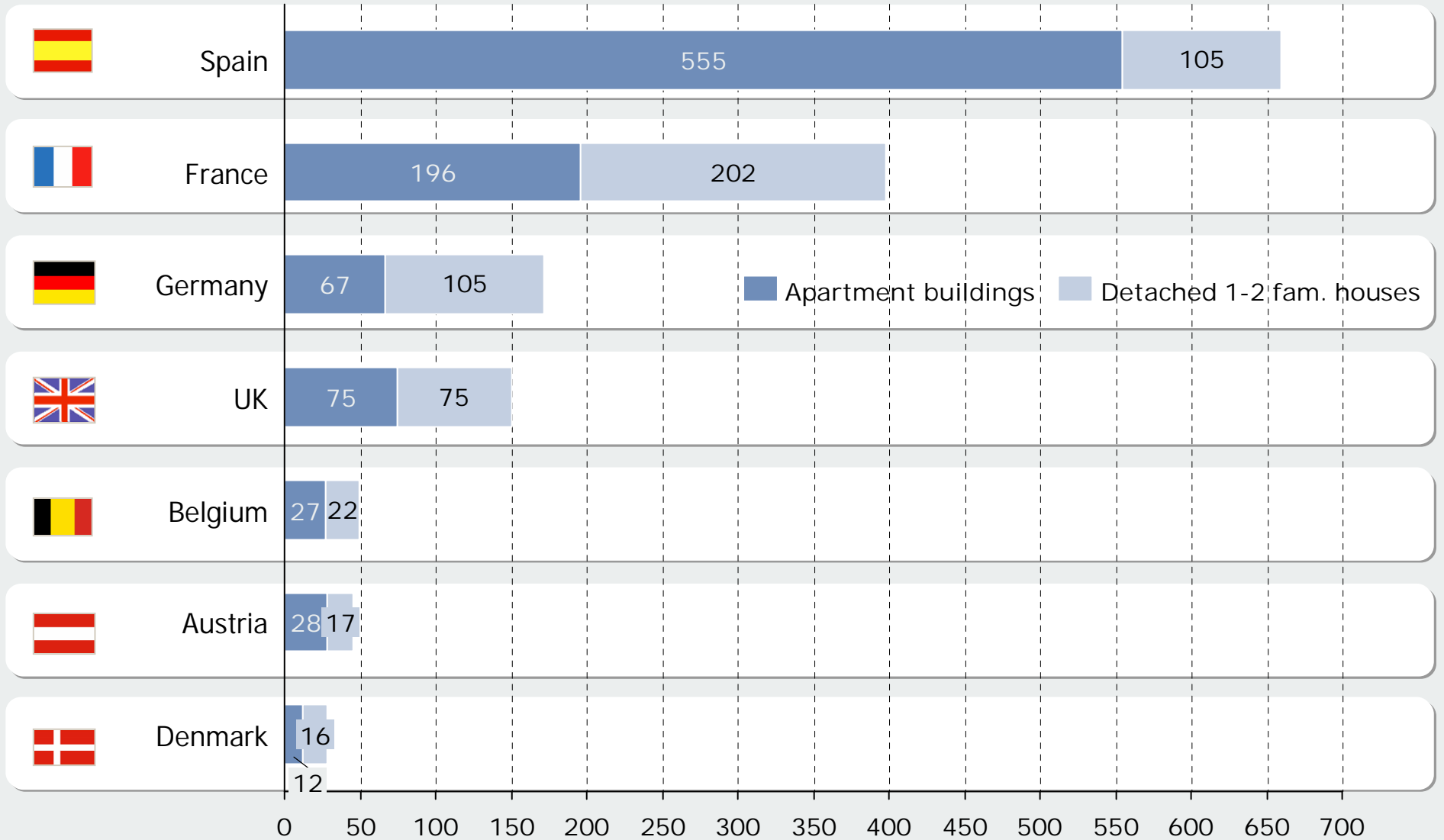




# Building completions in Europe 2008

19

Number of apartments in newly constructed residential buildings in tsd. units



Source: EUROCONSTRUCT, 2008

## Key-Findings

20

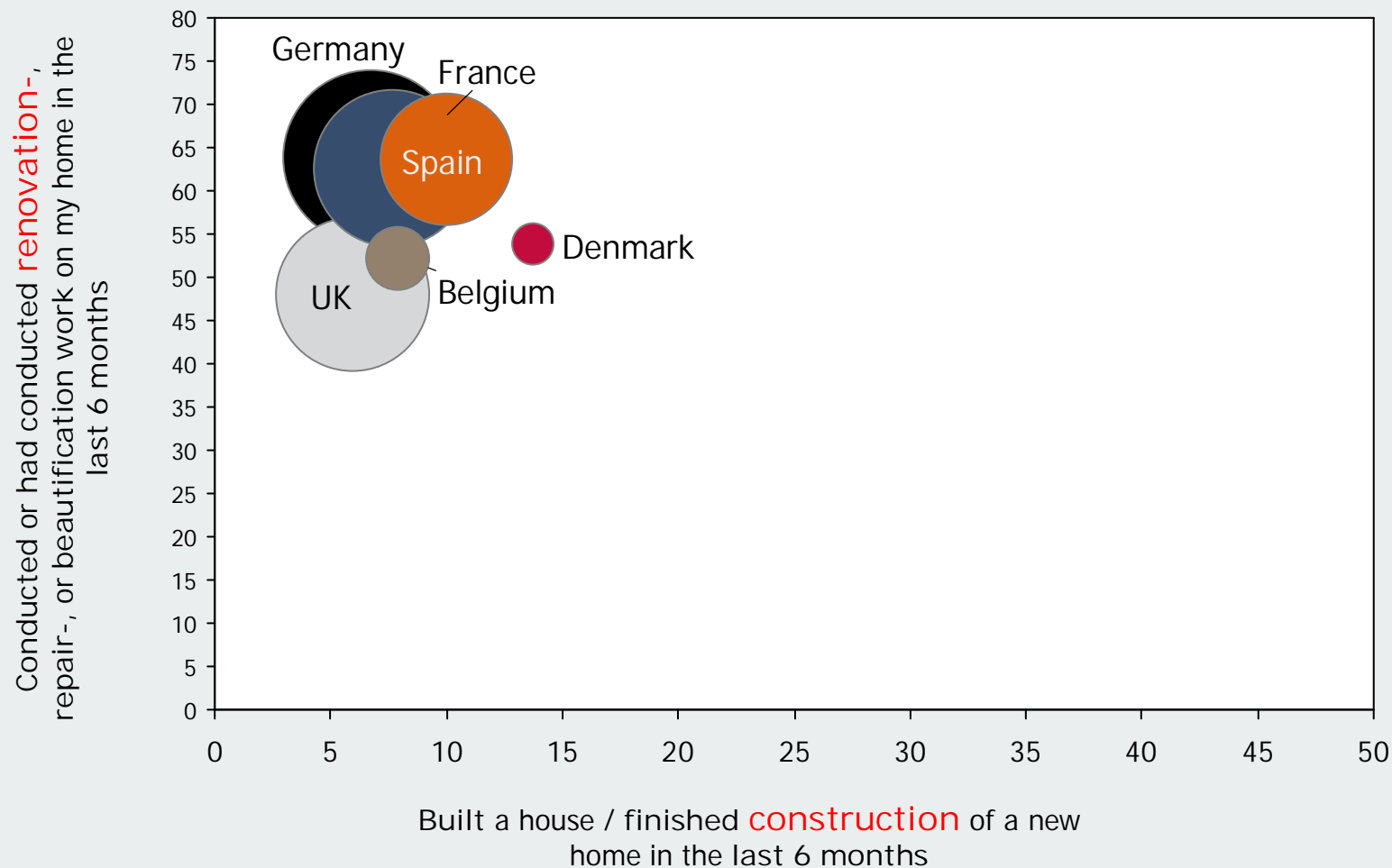
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- § With the exception of Spain, which had the highest building completions 2008, around 50% of the houses do need renovation in the eyes of end-consumers.
- § No surprise: among all countries, the reach of people who are **renovating is much higher than** the share of people who were **building a new house**.

While the share of people building a new home is generally rather low, the share of people renovating is quite high in all countries

21

Q5a: In the last 6 months, have you built a house or finished construction of a new home? (in %)

Q5b: In the last 6 months, have you conducted or had renovation-, repair- or beautification work conducted on your home (either in your house, apartment or vacation home) or garden? (in %)



## Key-Findings

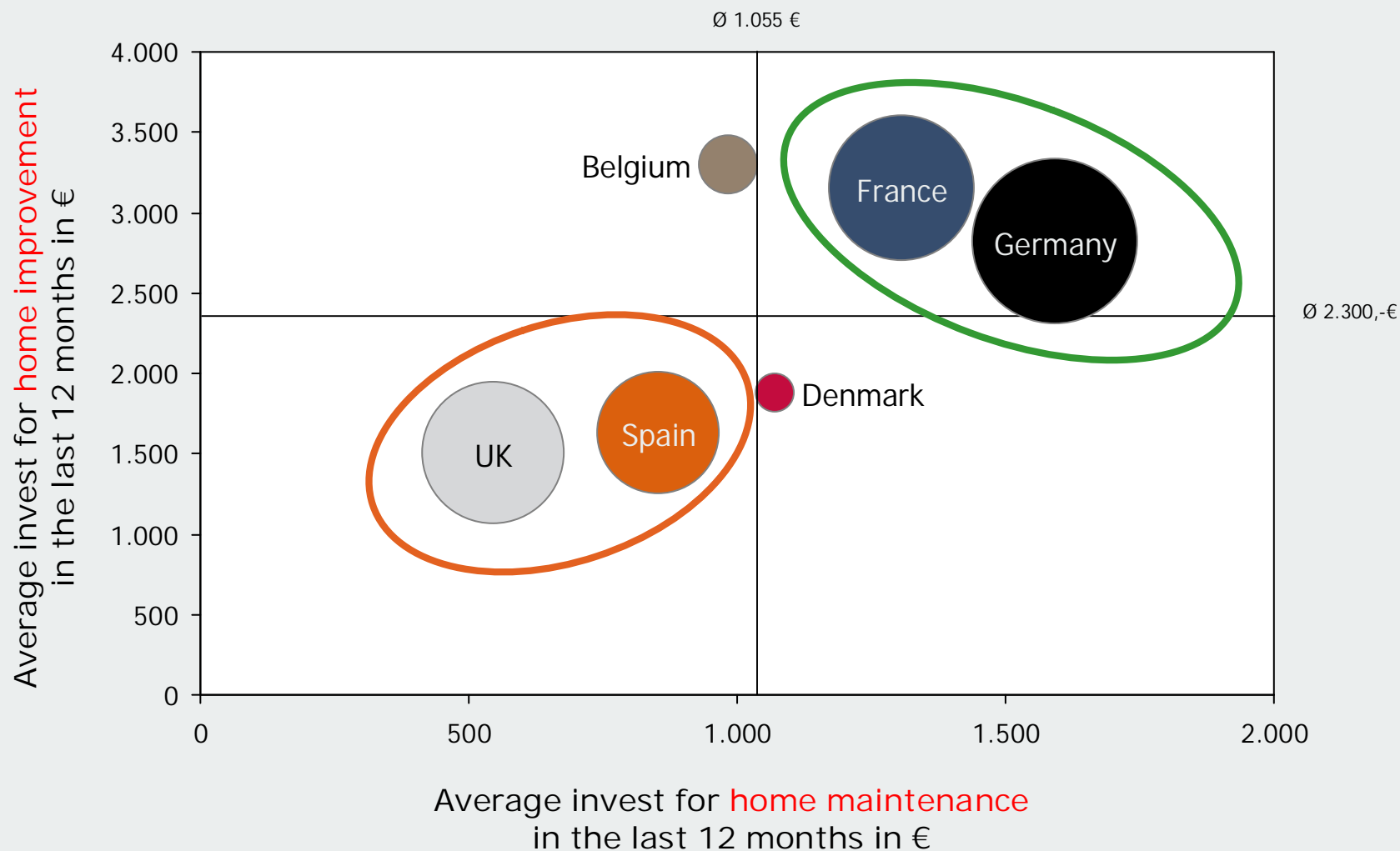
22

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- § No surprise: among all countries, the reach of people who are renovating is much higher than the share of people who were building a new house.
- § The average **expenses for home improvement** are **higher** in each country **than the average expenses for home maintenance**.
- § The **Germans and the French invest more** on average in both home improvement and home maintenance, while the average expenditure is comparably low in Spain and UK.

## The invest for home improvement and home maintenance is above average in France and Germany

6f: How much did you spend on home maintenance and home improvement during the last 12 months?

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## Key-Findings

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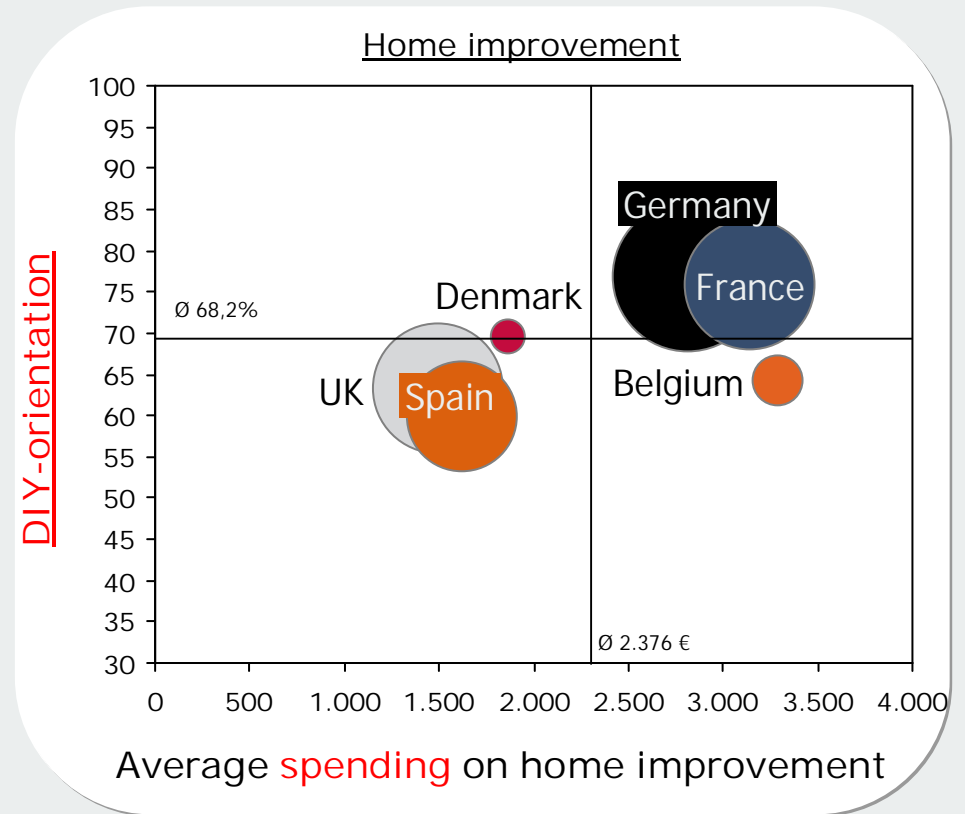
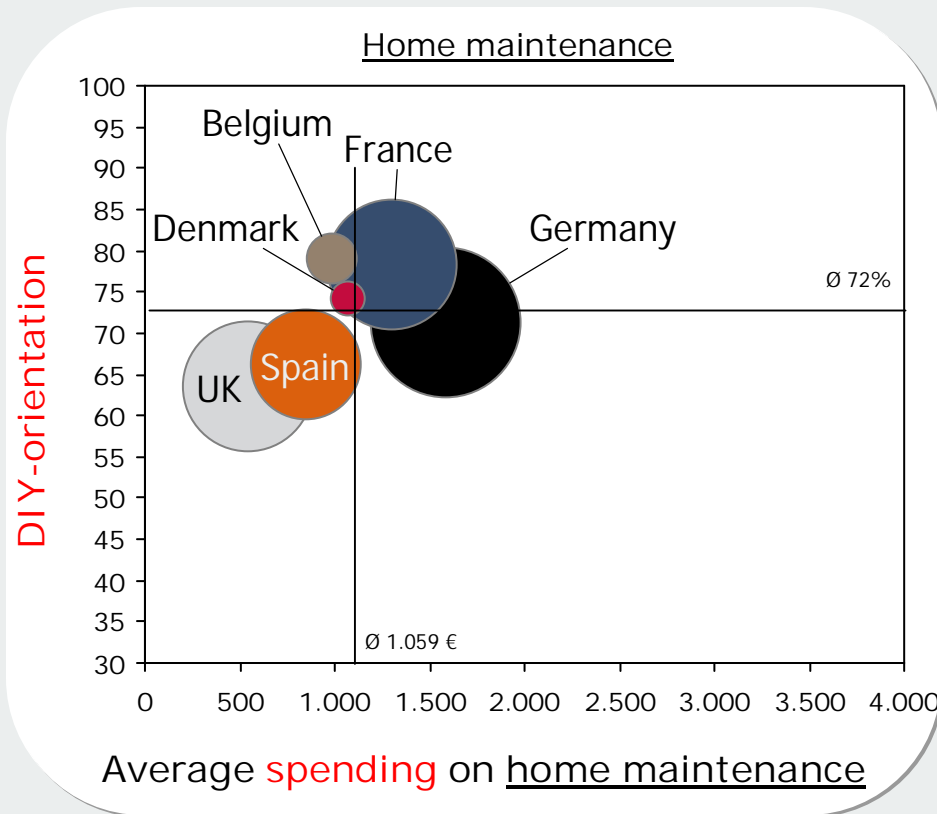
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- § No surprise: among all countries, the reach of people who are renovating is much higher than the share of people who were building a new house.
- § The average expenses for home improvement are higher in each country than the average expenses for home maintenance.
- § The Germans and the French invest more on average in both home improvement and home maintenance, while the average expenditure is comparably low in Spain and UK.
- § This finding exactly matches the fact that **in Germany and France the DIY-orientation is higher** than in the other countries in both categories.

France and Germany are the countries with the highest average spendings and the highest share of people who did 100% DIY, while in Belgium there is a great difference between home improvement and -maintenance

25

Q6f: How much did you spend on home maintenance and home improvement during the last 12 months? (in €)

Q6g: Which percentage of each of these activities did you do yourself? (in %)



## Key-Findings

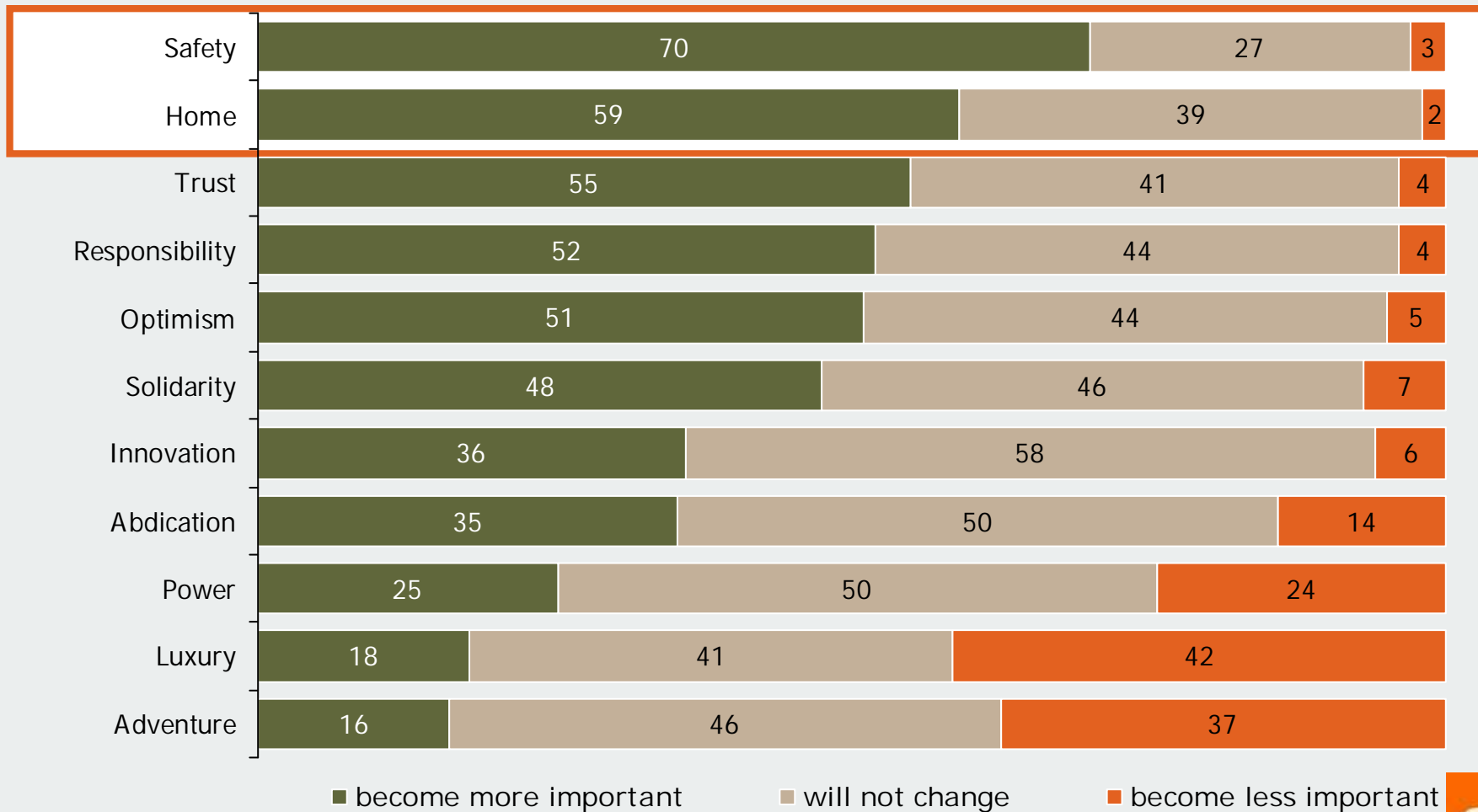
26

- § **Homing** is a trend that is highly **boosted by the crisis**:
  - § in January 2010, a share of 70% of the Germans stated that ones **“home” will become even more important** in the future.
  - § in addition **safety is ranked No. 2** of the changes in people’s priority.

## The crisis is changing consumers' priority: Homing becomes - against Adventure and Luxury - more important

### Evaluation of changes in people priorities

27



## Key-Findings

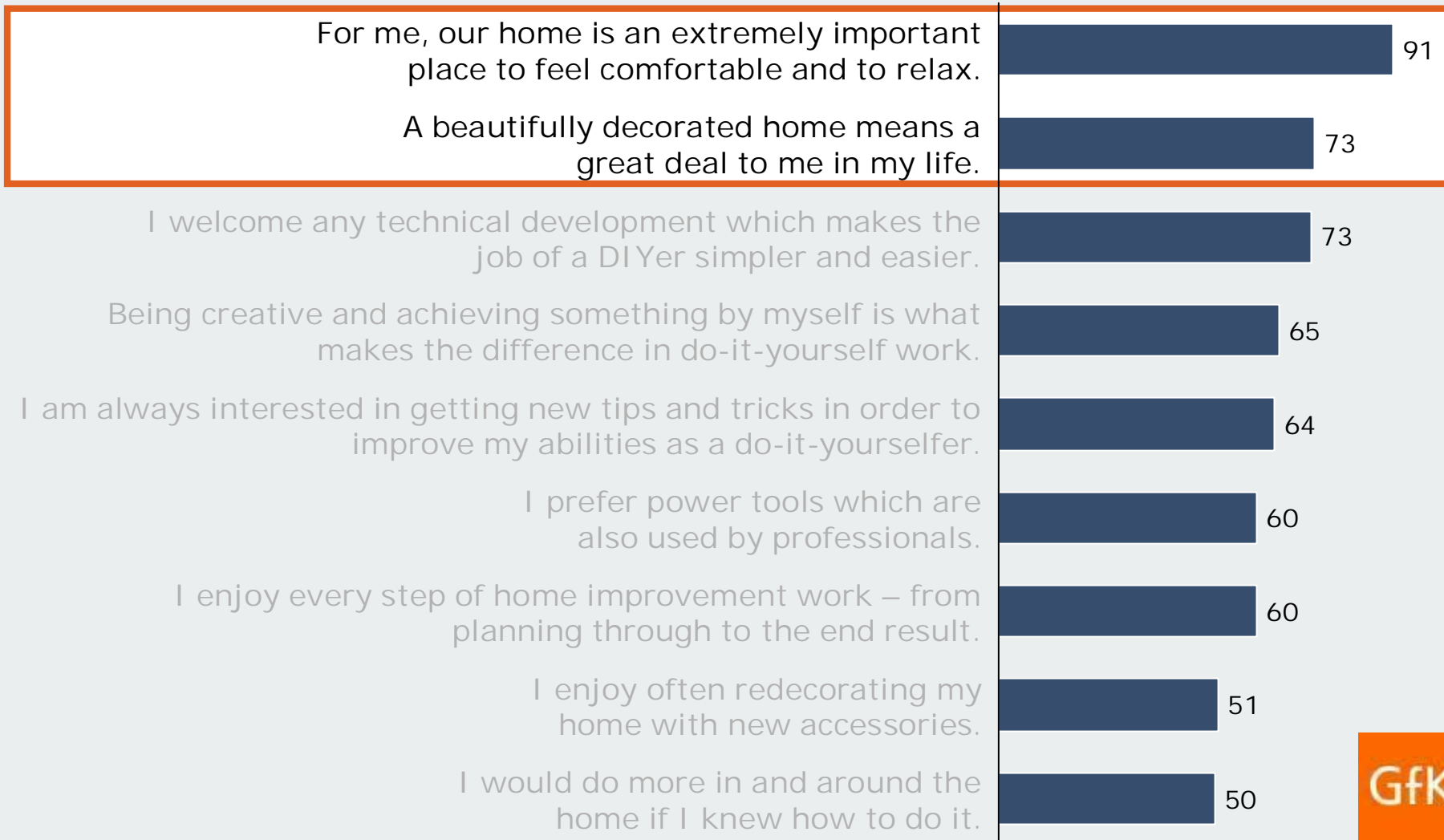
28

- § Homing is a trend that is highly boosted by the crisis:
  - § in January 2010, a share of 70% of the Germans stated that ones "home" will become even more important in the future.
  - § Safety is No. 2 of the changes in people's priority.
  - § For 91% of the participants today, their own home is an extremely important place to feel comfortable and to relax.

## People are seeking for know-how in the area of home improvement, because beautifying their home means a great deal to them

29

Q4d: In the following you will find statements about the topics of decorating and renovation. How strongly do you agree to these statements? (1 = "I don't agree at all" and 4 = "I agree completely") (Top-Box 3+4; in %)



## Key-Findings

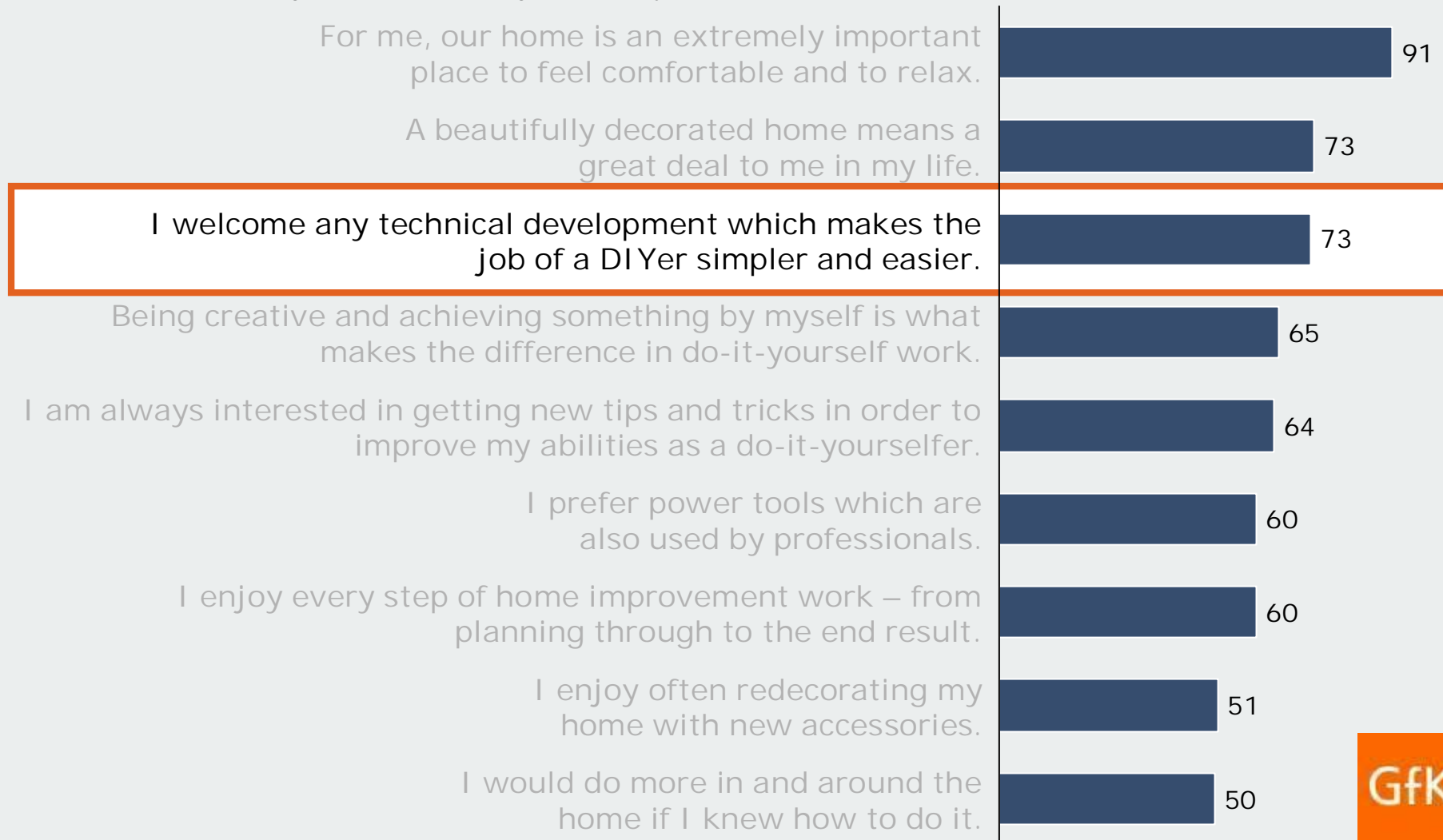
30

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  - § For 91% of the participants today, their own home is an extremely important place to feel comfortable and to relax.
- § **Innovations** that simplify DIY **are welcome** and appreciated by three quarter.

## People are seeking for know-how in the area of home improvement, because beautifying their home means a great deal to them

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31



## Key-Findings

32

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- § Innovations that simplify DIY are welcome and appreciated by three quarter.
- § End consumers are **very keen to improve their DIY skills.**

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33



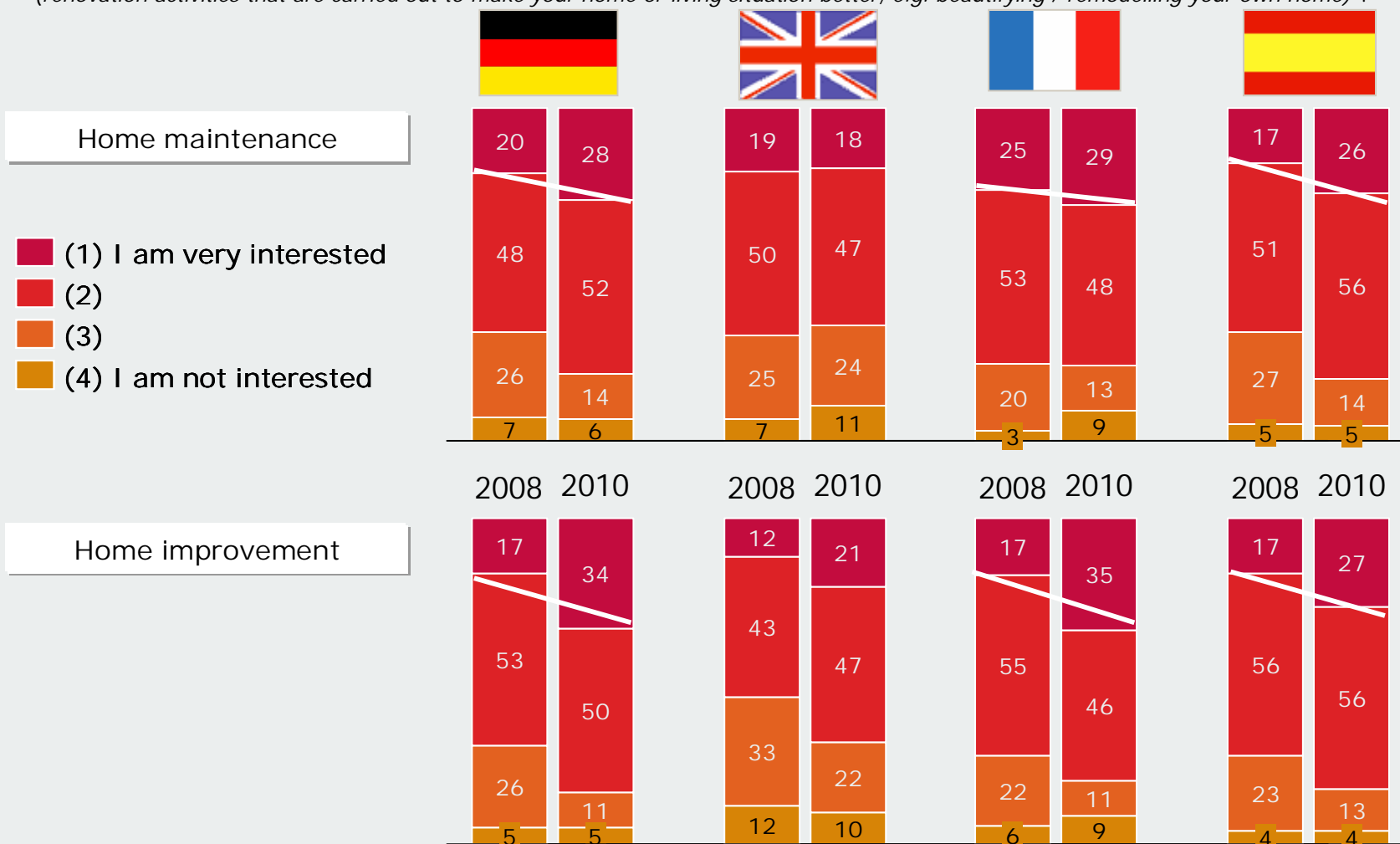
## Key-Findings

34

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- § For 91% of the participants today, their own home is an extremely important place to feel comfortable and to relax.
- § Innovations that simplify DIY are welcome and appreciated by three quarter.
- § End consumers are very keen to improve their DIY skills.
- § The **share of people** who are (highly) **interested in the topics** of home improvement and home maintenance **has increased within one year.**

# Among all countries, the interest for both home maintenance and improvement has been significantly growing within the last three years

Q4a: In comparison to other topics such as cars, vacations, fashion or sport, how interested are you about home maintenance (renovation activities that are required to conserve the quality and condition of your home) and home improvement (renovation activities that are carried out to make your home or living situation better, e.g. beautifying / remodelling your own home) ?



Source 2008: International GfK Home- & Garden Monitor (IHGM), GfK Living



## Key-Findings

36

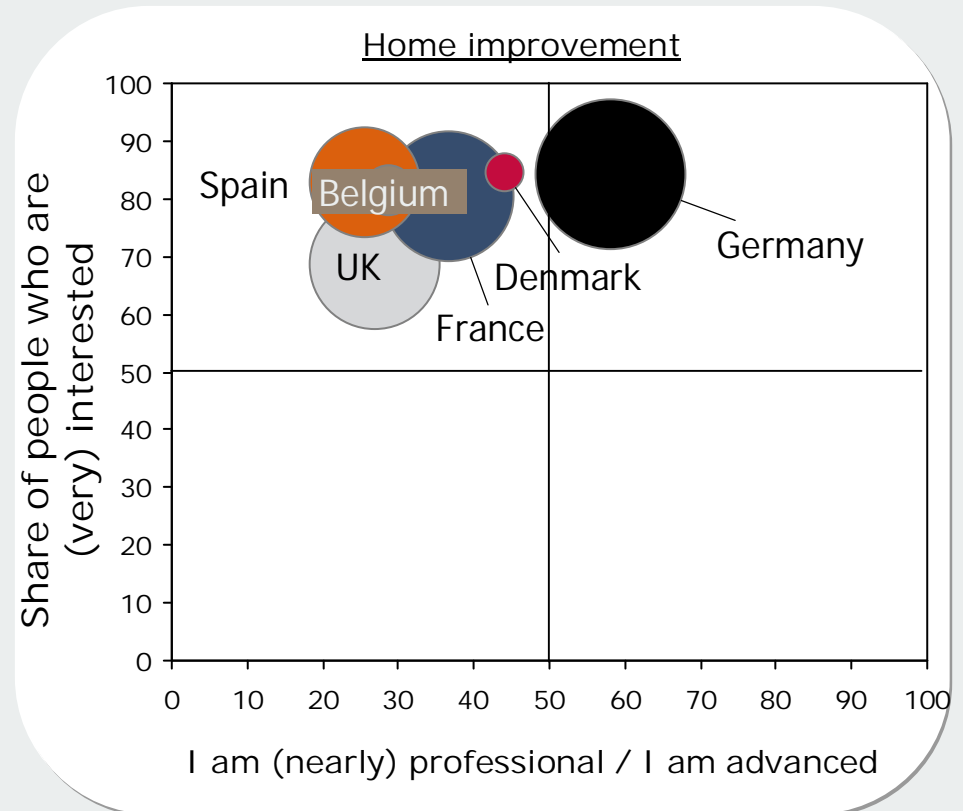
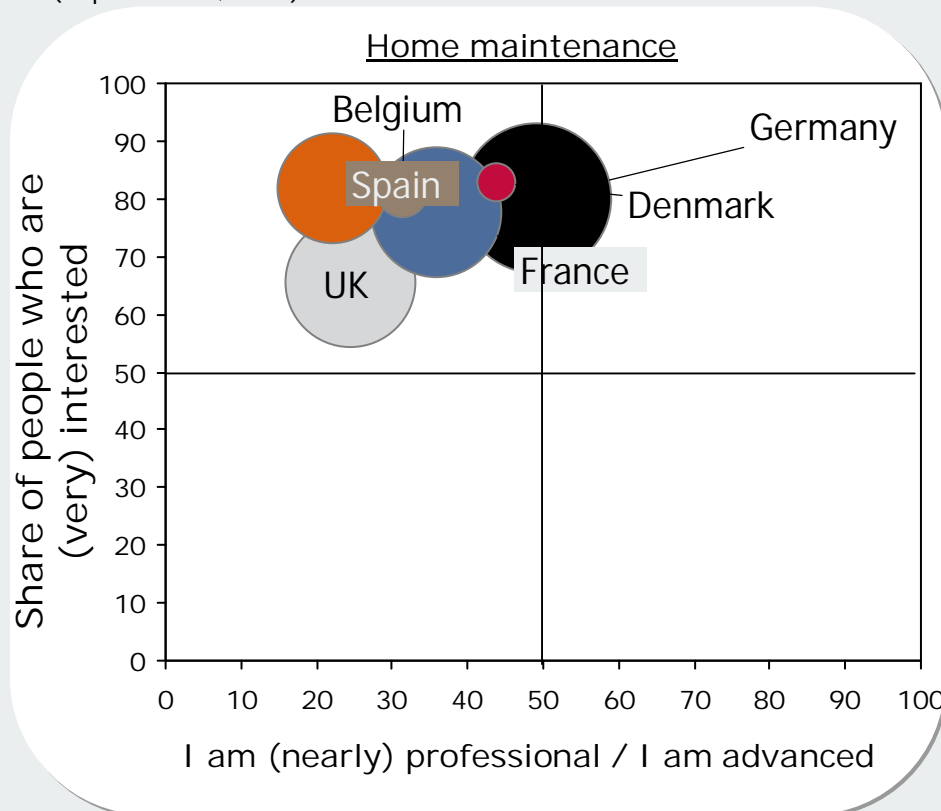
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- § For 91% of the participants today, their own home is an extremely important place to feel comfortable and to relax.
- § Innovations that simplify DIY are welcome and appreciated by three quarter.
- § End consumers are very keen to improve their DIY skills.
- § The share of people who are (highly) interested in the topics of home improvement and home maintenance has increased within one year.
- § Especially Spain and UK offer an **additional opportunity by improving the skills** of end consumers.

While the interest in home improvement and maintenance is very high - partially with the exception of Germany - the skills are comparably low

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Q4a: In comparison to other topics such as cars, vacations, fashion or sport, how interested are you about home improvement (such as renovation, home repair, construction, modernization, etc.) and decorating work (such as beautifying / remodelling your own home, decorating with fabrics / colours etc.)? (Top-Box 3+4; in %)

Q4c: Which of the following descriptions best describes your ability in the areas of home improvement and decorating? (Top-Box 3+4; in %)



## Key-Findings

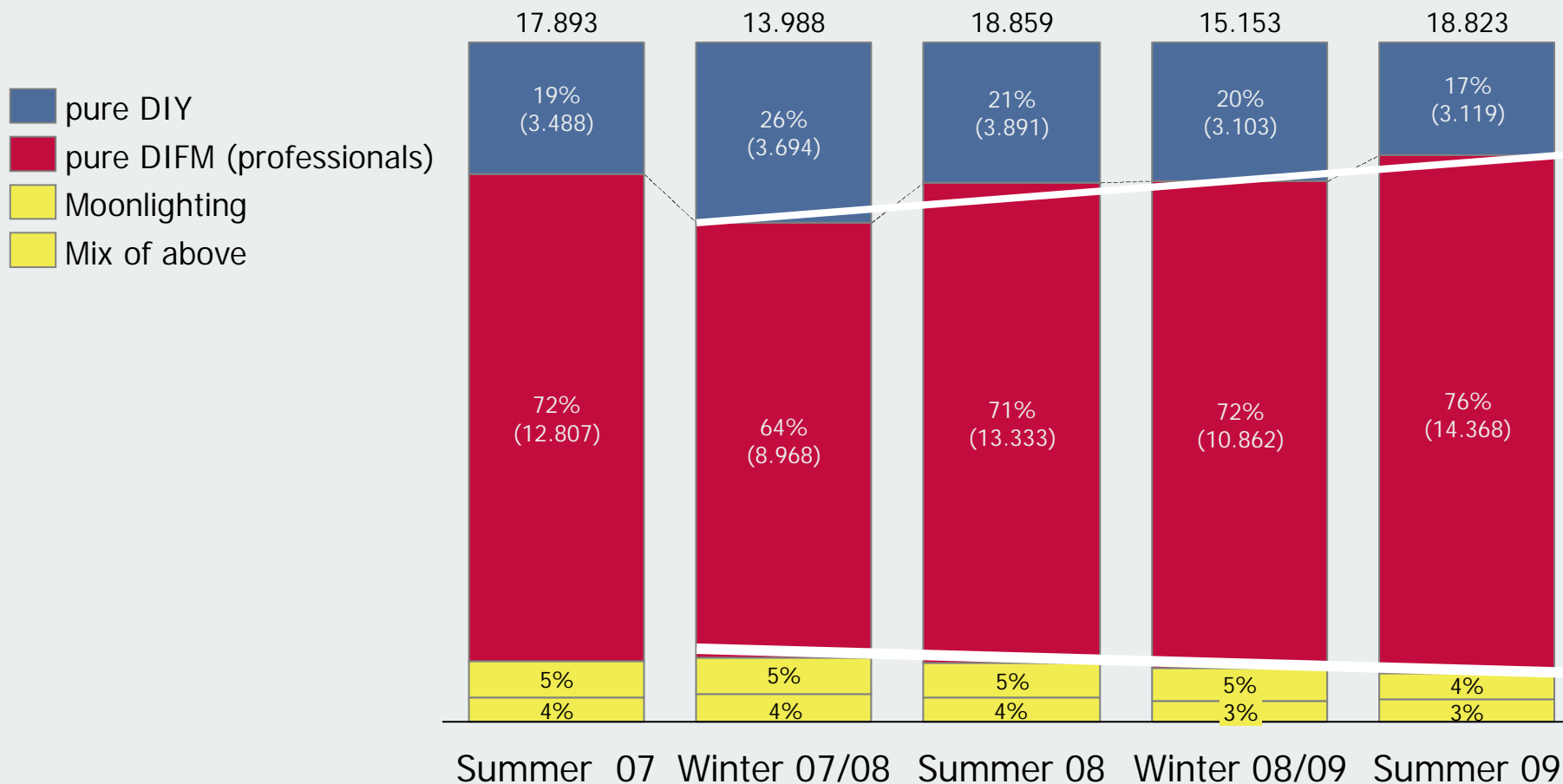
38

- § Due to an growing demand for convenience and an ageing society the share of **DIFM (do it for me) is growing** in the renovation market (on the example of Germany)

Even though the share of pure do-it-yourself spendings among renovation is decreasing...

Renovation spendings in Germany (in million Euro)

39



Source: GfK RenovationBarometer 07/08

(Winter: October to March of the following year / Summer: April to September of the respective year)

## Key-Findings

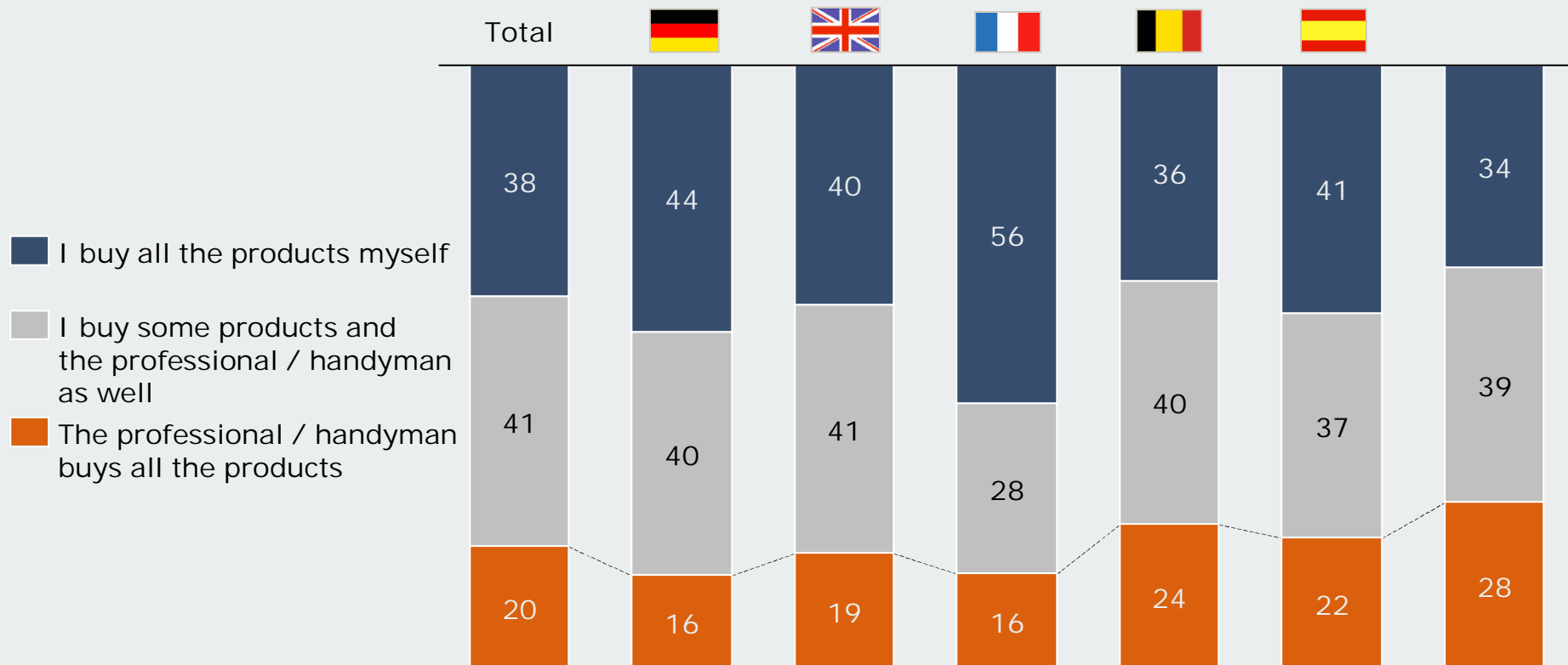
40

- § Due to an growing demand for convenience and an ageing society the share of DIFM (do it for me) is growing in the renovation market (on the example of Germany)
- § The good news: **many end consumers even buy** – at least parts of the needed products – **when working with professionals.**

## Even when hiring a “professional” many people buy all or parts of the needed products for their project do-it-yourself

Q1c: When hiring a professional / handyman, do you buy all the products / materials for the projects / renovating etc. yourself or do you have the professional / handyman buying them? (in %)

41



A woman with long blonde hair, wearing a dark long-sleeved top and light-colored pants, stands in a lush green garden. She is holding a large, glossy red heart in front of her chest with both hands. The background is filled with vibrant green foliage and a clear blue sky. In the top left corner, there is an orange square containing the white text 'GfK'.

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**Potential:**

One's garden is even getting more important

## Key-Findings

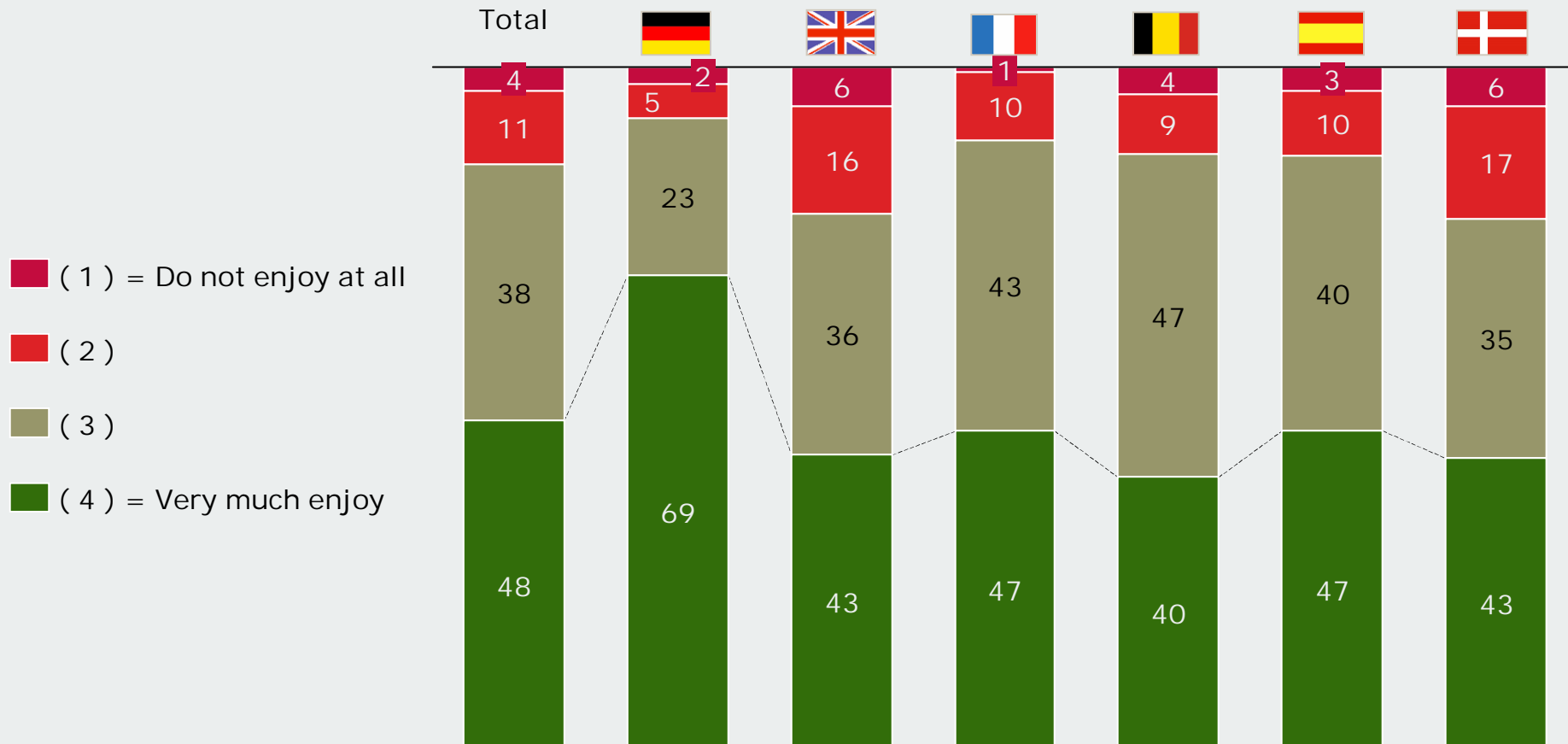
§ Over all countries - especially in Germany - **people really enjoy spending time in their garden.**

43

## Among all countries the own garden is a place of joy

Q3d: How much do you enjoy spending time in your garden? (in %)  
For this scale, 1 = "Do not enjoy at all" and 4 = "very much enjoy"

44



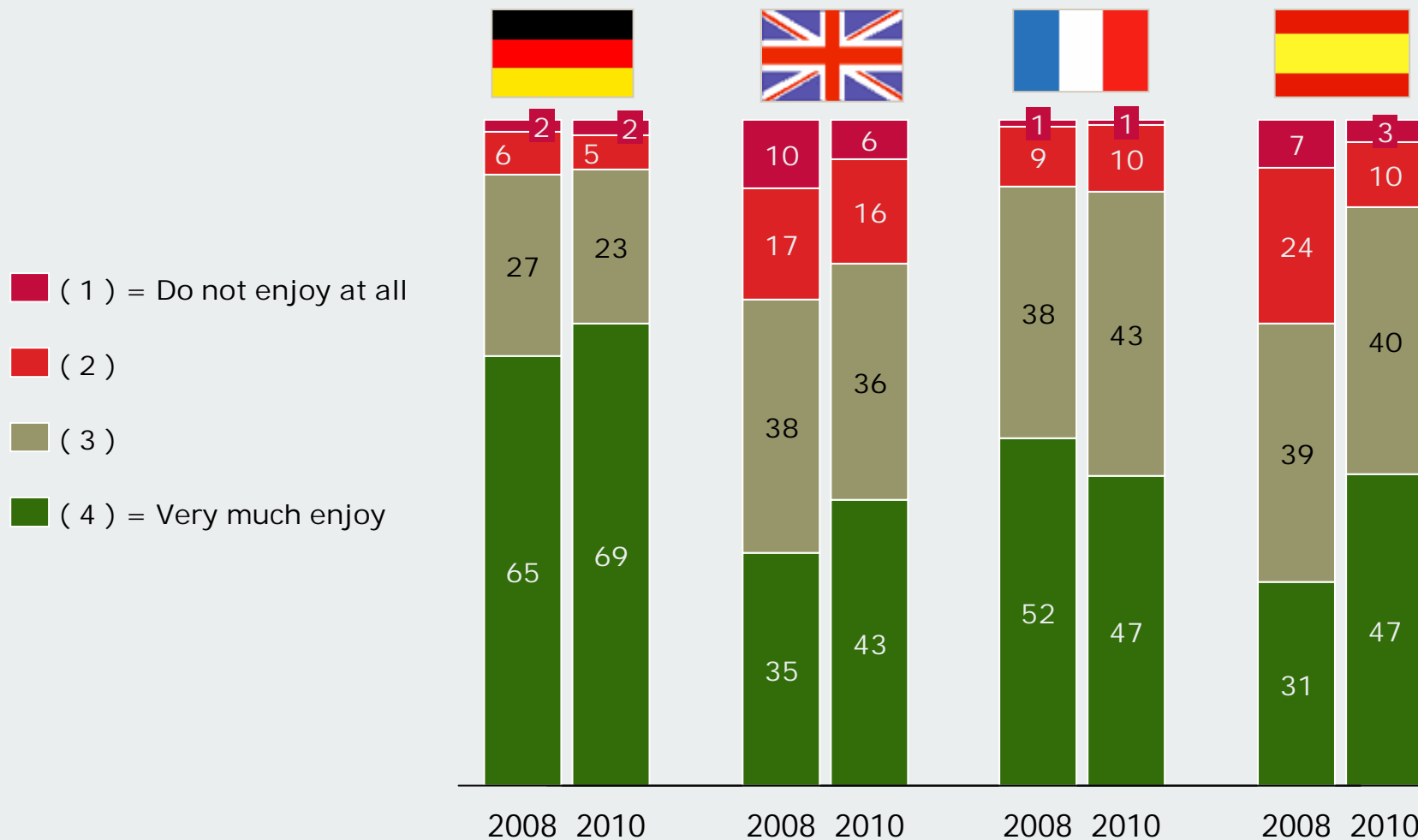
## Key-Findings

- § Over all countries - especially in Germany people really enjoy spending time in their garden.
- § On a already high level **this emotion has even increased** within one year in most of the comparable countries.

45

# With the exception of France, people do more and more enjoy spending time in their garden

Q3d: How much do you enjoy spending time in your garden? (in %)  
 For this scale, 1 = "Do not enjoy at all" and 4 = "very much enjoy"



## Key-Findings

47

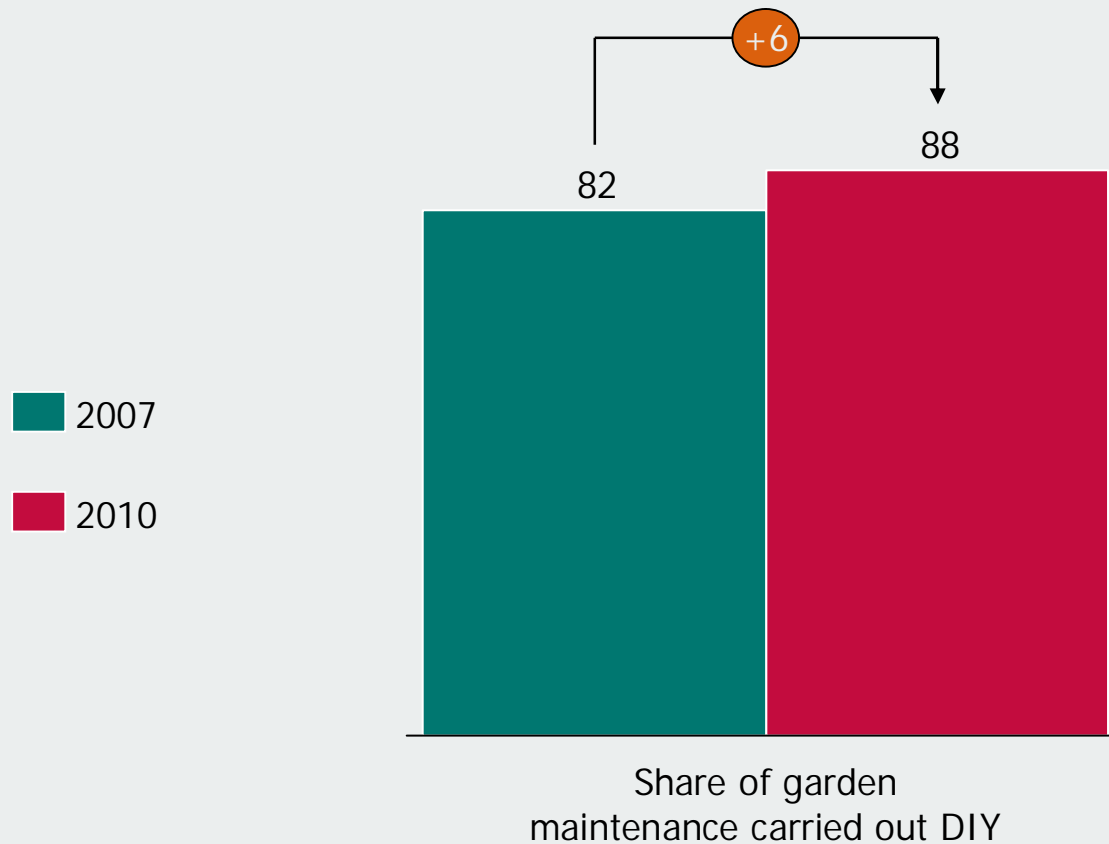
- § Over all countries - especially in Germany people really enjoy spending time in their garden.
- § On a already high level this emotion has even increased within one year in most of the comparable countries.
- § It might be for that reason why **the garden maintenance** that was **carried out do-it-yourself** in 2009 **even increased** compared to 2007.

## The share of Garden maintenance that is carried out by DIY has been increasing over the last three years

Total

Q8g: Which percentage of each of these activities did you do yourself? (in %)

48



## Key-Findings

49

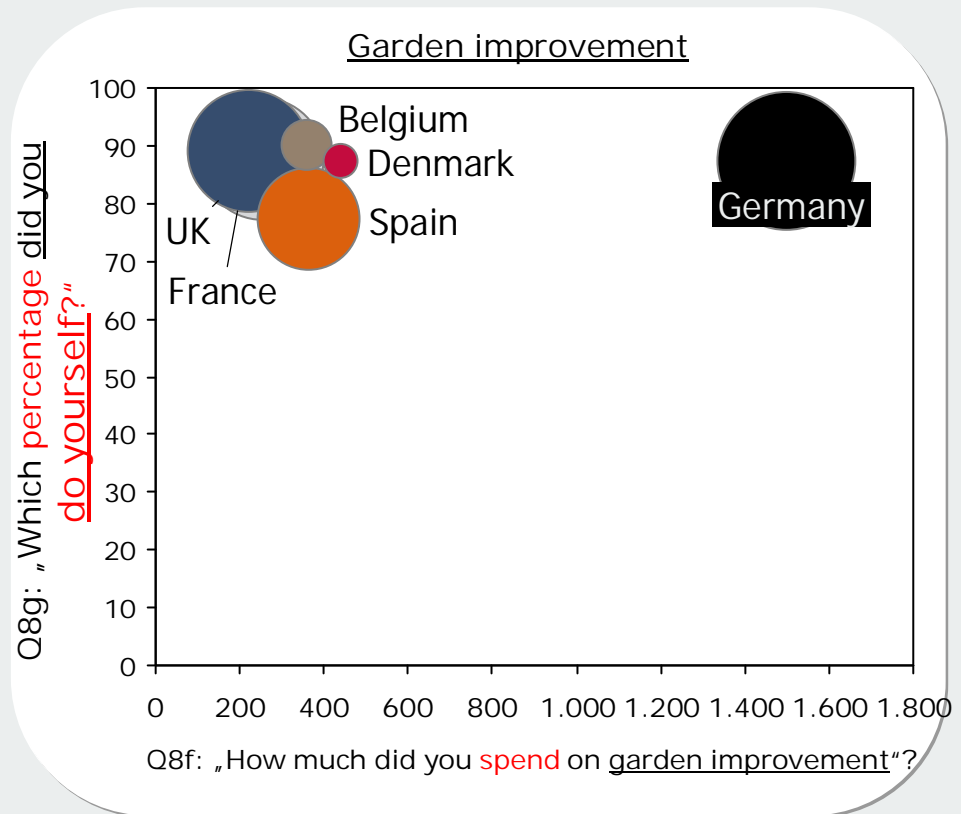
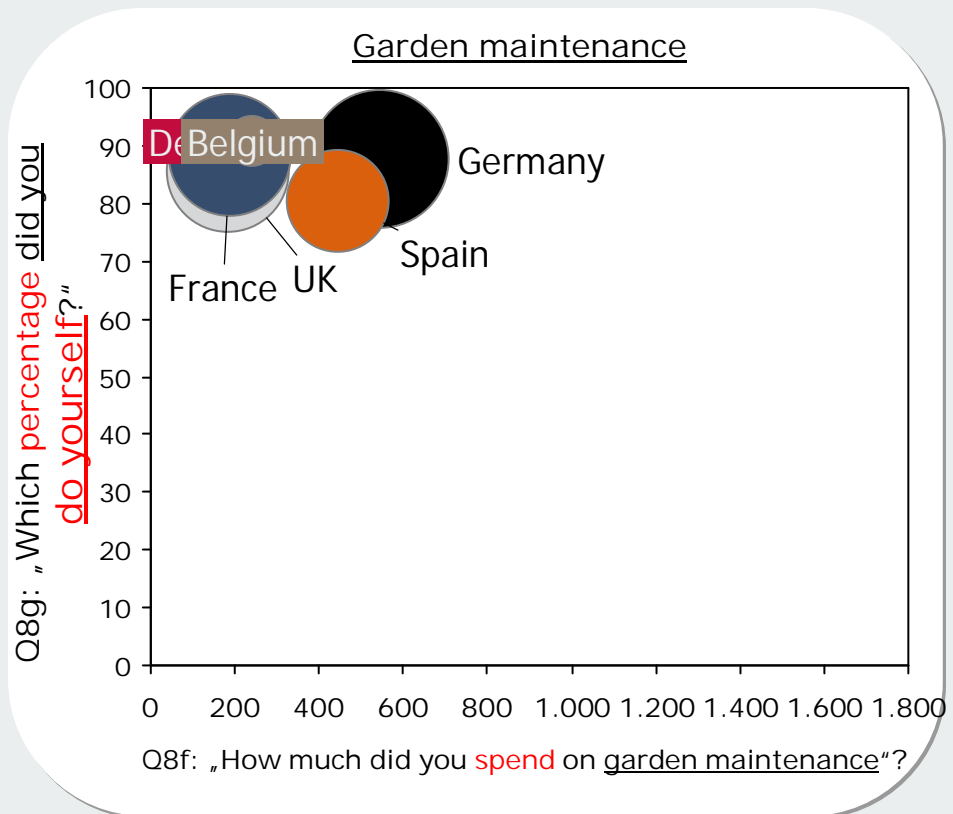
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- § On a already high level this emotion has even increased within one year in most of the comparable countries.
- § It might be for that reason why the garden maintenance that was carried out do-it-yourself in 2009 even increased compared to 2007.
- § While the average spending for garden improvement and maintenance is comparably high in Germany, all countries have a very high share of people who are **mainly doing gardening projects DIY.**

In Germany, there are by far the highest average expenses in the sector garden improvement compared to the other countries

Q8f: How much did you spend on garden maintenance and garden improvement during the last 12 months?

Q8g: Which percentage of each of these activities did you do yourself?

50



The image shows three individuals in professional attire (suits) standing side-by-side. Each person is holding a large target board in front of their face, completely obscuring it. The target boards are identical, featuring a central yellow bullseye, surrounded by concentric rings of red, blue, and black. The GfK logo is visible in the top left corner of the image.

GfK

# Consumer Insights: Target Groups

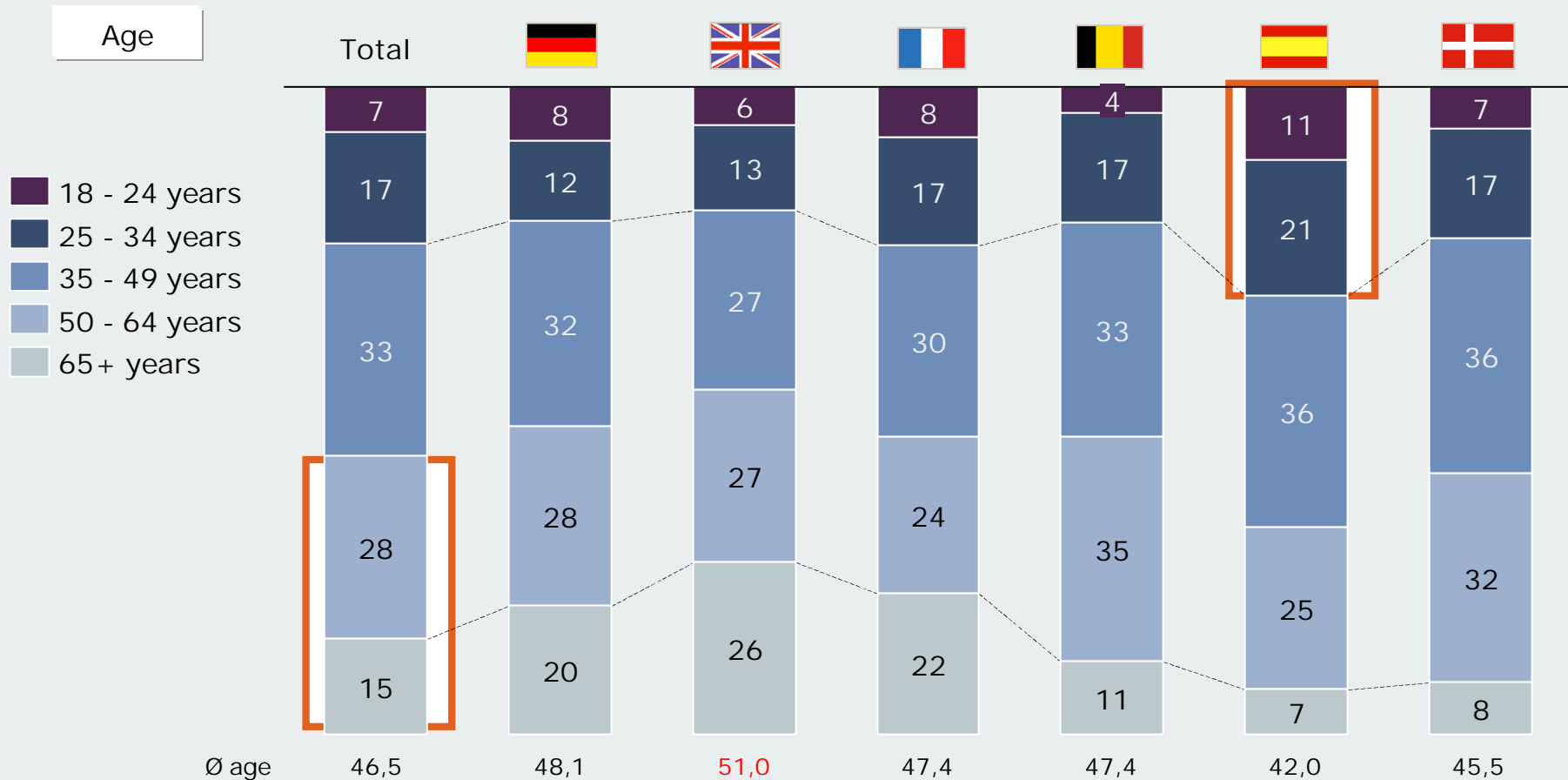
## Key-Findings

52

- § In our aging society “Best Ager” (50+) and the “Generation Silver” (60+) are gaining more and **more importance** in the market:
  - § **42%** of the people who are mainly dealing with the renovation within the households **are – over all countries – older than 50 years.**
  - § Only **in Spain, people aged 18 to 34 years are playing** a comparably **an important role** when it comes to renovation with a share of 33% (50plus = 32%).

# Older people are a very important target group when it comes to the realization of renovation work

Q1b: Please write down the age and gender of the person who mainly deals with the realization of renovation work in your household (in %)



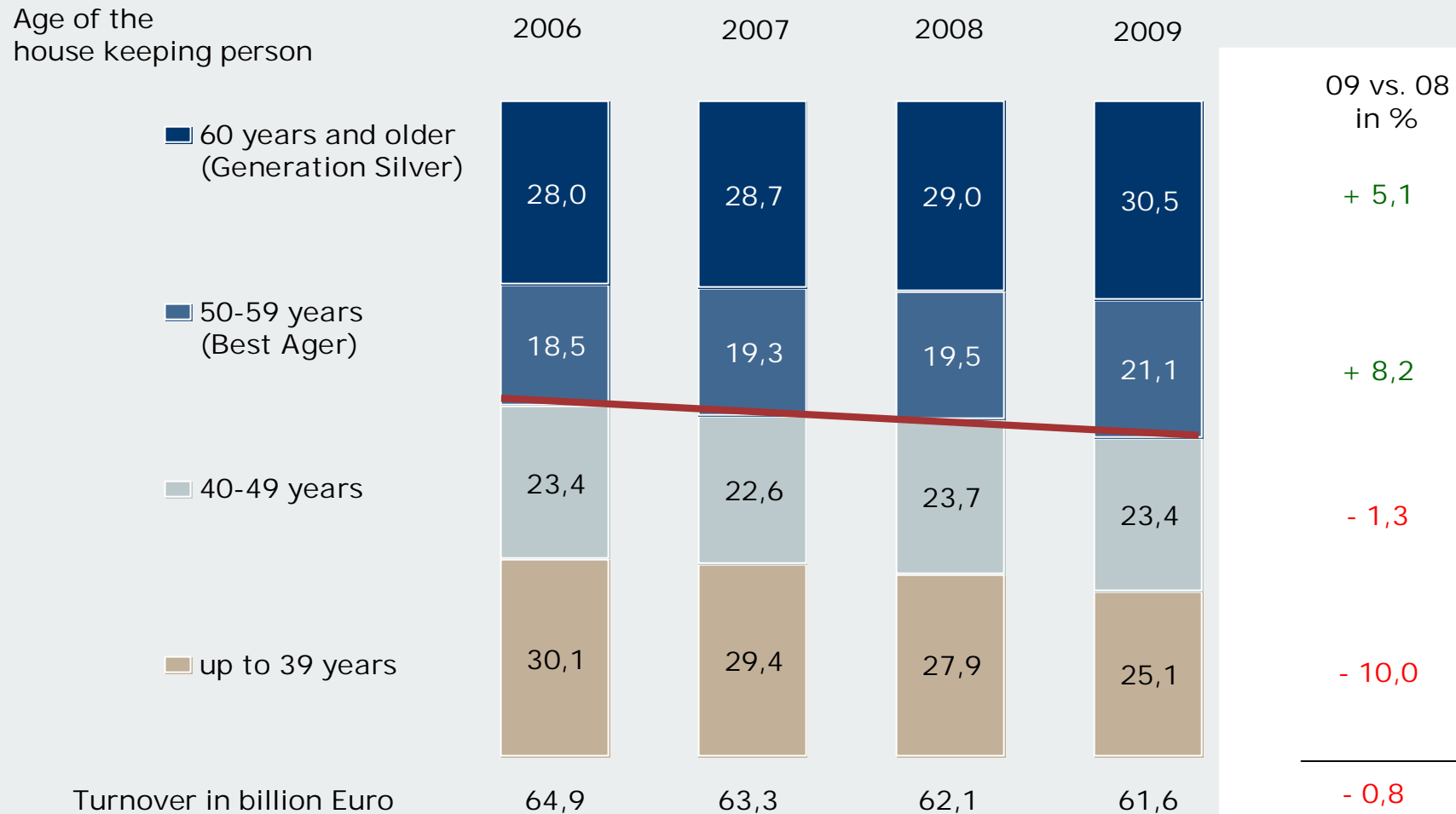
## Key-Findings

54

- § In our aging society “Best Ager” (50+) and the “Generation Silver” (60+) are gaining more and more importance in the market:
  - § 42% of the people who are mainly dealing with the renovation within the households are – over all countries – older than 50 years.
  - § Only in Spain, people aged 18 to 34 years are playing a comparably important role when it comes to renovation with a share of 33% (50plus = 32%).
  - § In Germany, already **52%** of all expenses for DIY products are – with a significantly growing trend – **decided by people who are older than 50** years.

The DIY market in Germany would have been decreasing even more, if there were no best- and silver agers, who are realizing growing shares

55



## Key-Findings

56

- § In our aging society “Best Ager” (50+) and the “Generation Silver” (60+) are gaining more and more importance in the market:
  - § 42% of the people who are mainly dealing with the renovation within the households are – over all countries – older than 50 years.
  - § Only in Spain, people aged 18 to 34 years are playing a comparably important role when it comes to renovation with a share of 33% (50plus = 32%).
  - § In Germany, already 52% of all expenses for DIY products are – with a significantly growing trend – decided by people who are older than 50 years.
- § When it comes to home maintenance and home improvement, the **older generation has the highest interest as well as** – due to experience – **the highest skills**.

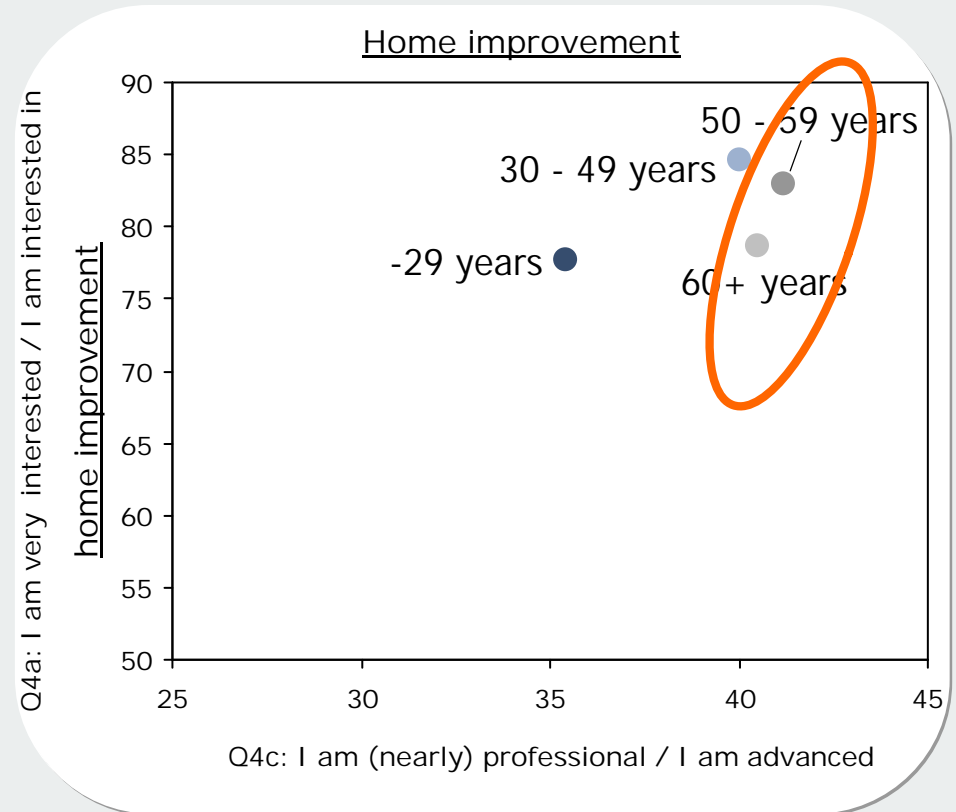
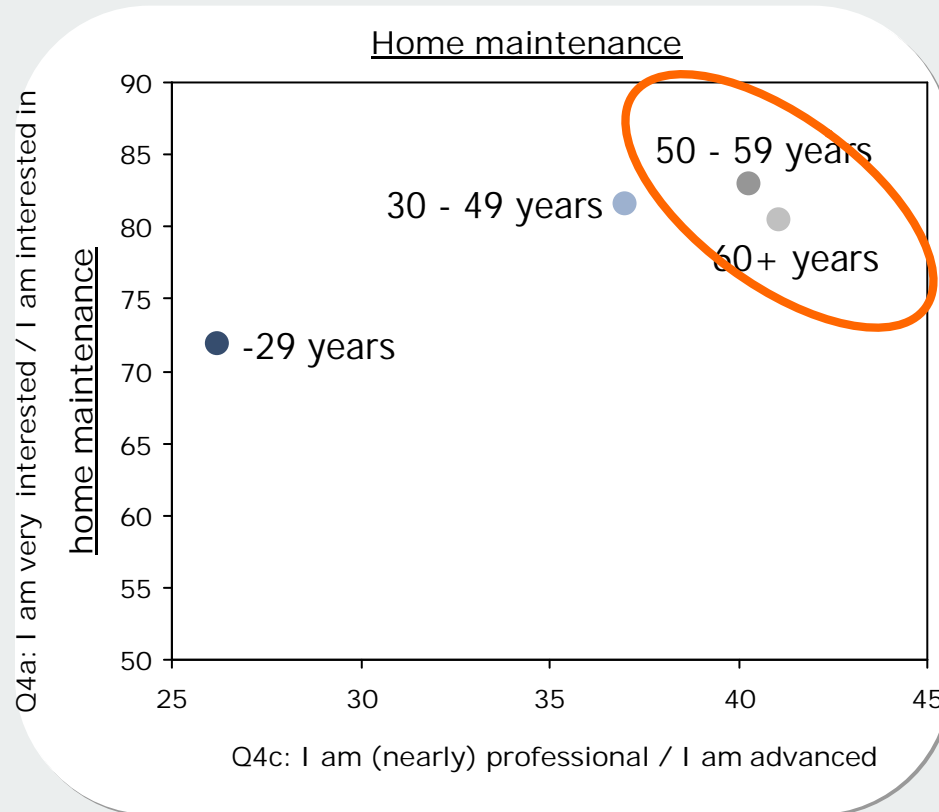
## Especially people in the age of 50+ consider themselves advanced renovators

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57

Q4a: In comparison to other topics such as cars, vacations, fashion or sport, how interested are you about home improvement (such as renovation, home repair, construction, modernization, etc.) and decorating work (such as beautifying / remodelling your own home, decorating with fabrics / colours etc.)? (Top-Boxes 1+2)

Q4c: Which of the following descriptions best describes your ability in the areas of home improvement and decorating?



## Key-Findings

58

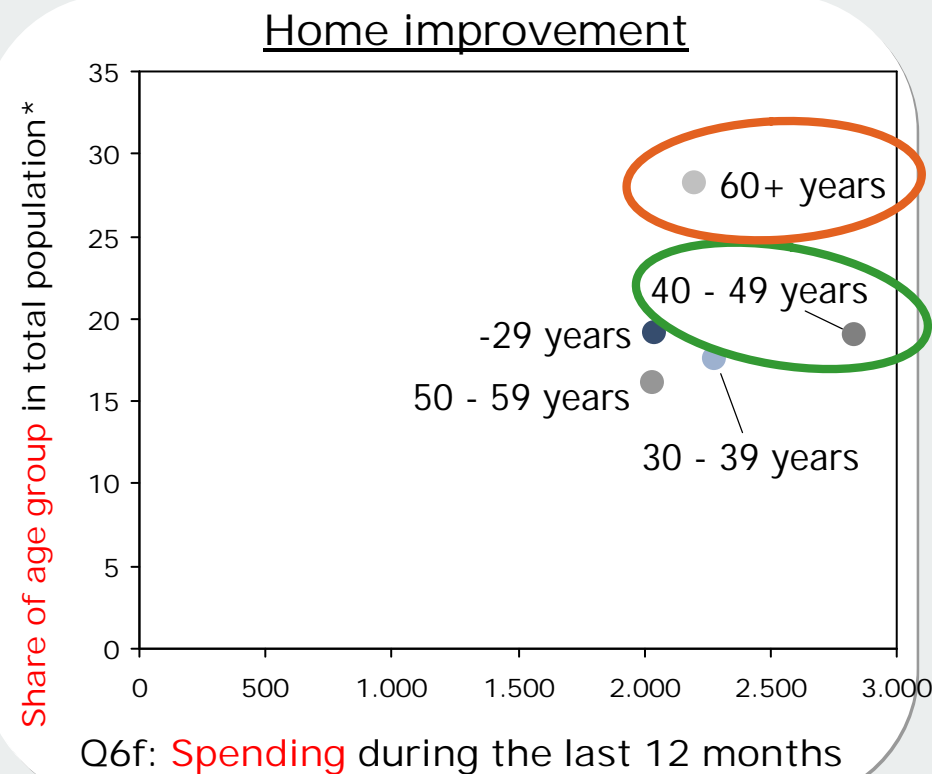
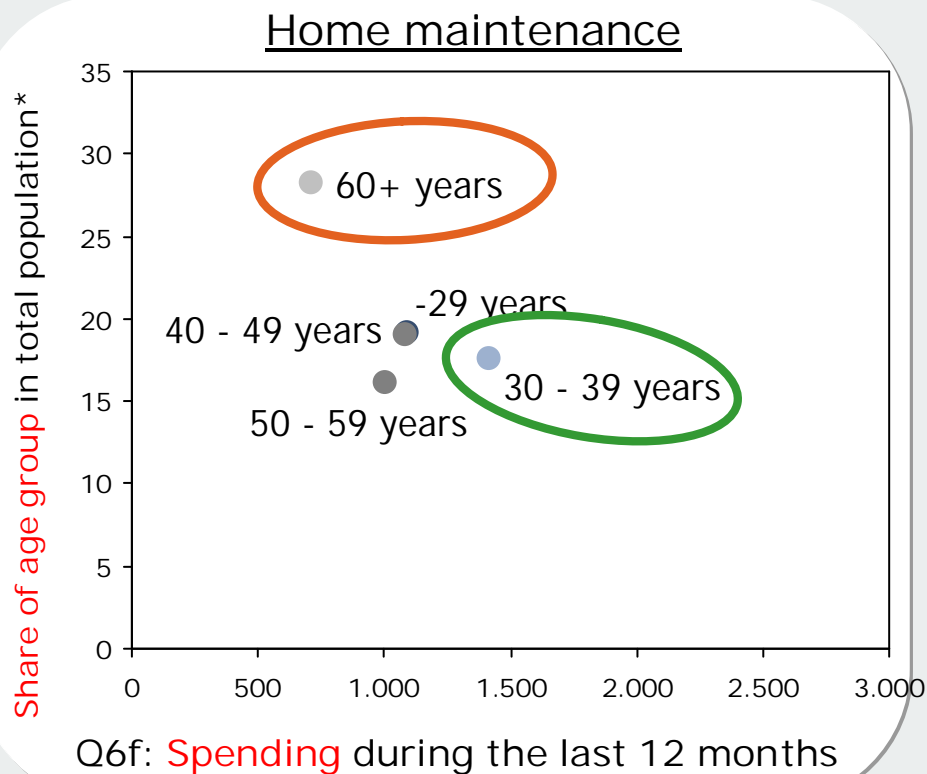
- § In our aging society “Best Agers” (50+) and the “Generation Silver” (60+) are gaining more and more importance in the market:
  - § 42% of the people who are mainly dealing with the renovation within the households are – over all countries – older than 50 years.
  - § Only in Spain, people aged 18 to 34 years are playing a comparably important role when it comes to renovation with a share of 33% (50plus = 32%).
  - § In Germany, already 52% of all expenses for DIY products are – with a significantly growing trend – decided by people who are older than 50 years.
- § When it comes to home maintenance and home improvement, the older generation has the highest interest as well as – due to experience – the highest skills.
- § Nevertheless, the importance of this target group is especially **founded on their high and even growing share** among the population rather than in their average expenditure for DIY.

People who are 60 years and older do not have the highest invests but are by far the largest age group in all countries



59

Q6f: How much did you spend on home maintenance and home improvement during the last 12 months? (Average in €)  
Share of age group in total population\*



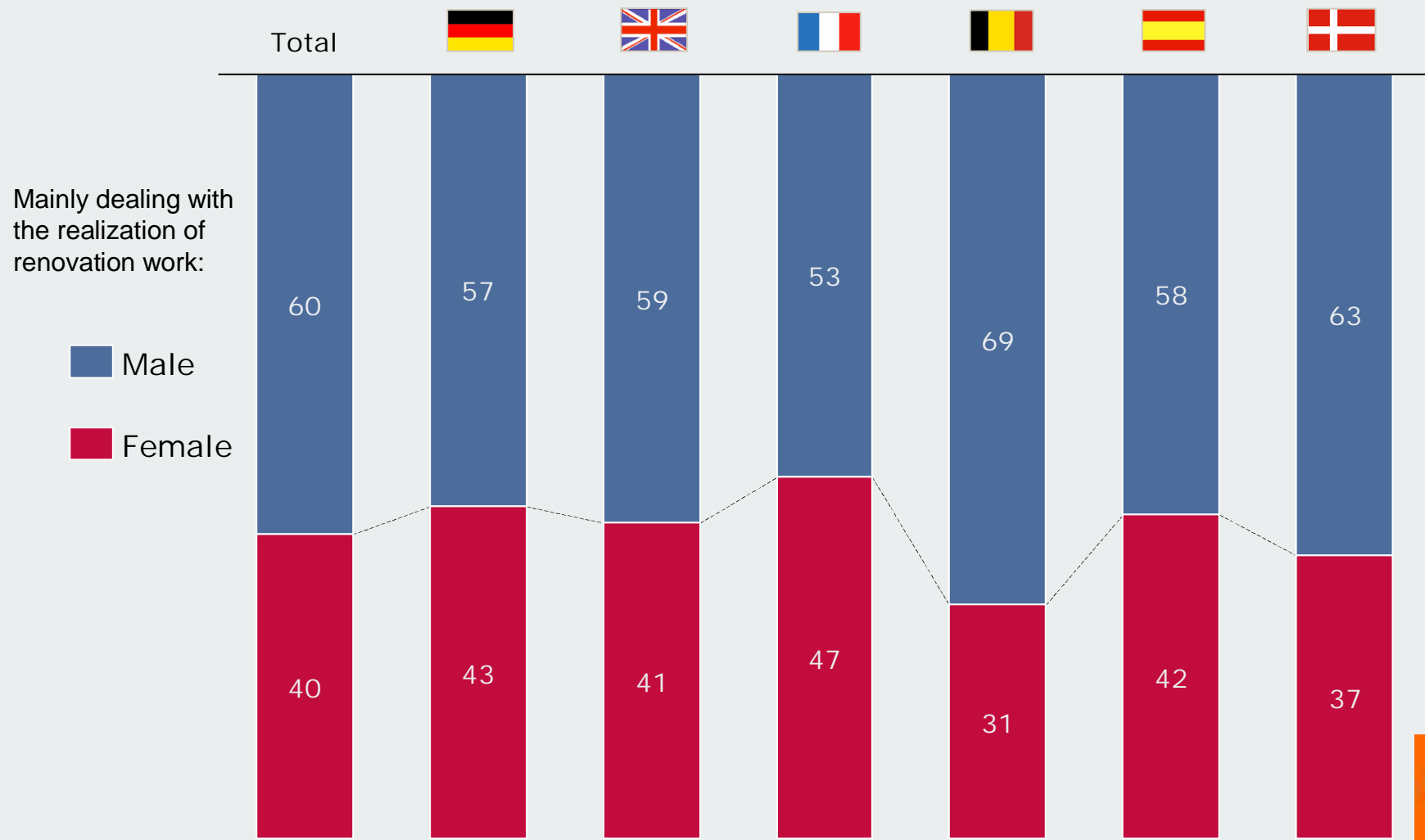
## Key-Findings

60

- § In our aging society “Best Ager” (50+) and the “Generation Silver” (60+) are gaining more and more importance in the market:
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  - § Only in Spain, people aged 18 to 34 years are playing a comparably important role when it comes to renovation with a share of 33% (50plus = 32%).
  - § In Germany, already 52% of all expenses for DIY products are – with a significantly growing trend – decided by people who are older than 50 years.
- § When it comes to home maintenance and home improvement, the older generation has the highest interest as well as – due to experience – the highest skills.
- § Nevertheless, the importance of this target group is especially founded on their high and even growing share among population than in their average expenditure for DIY.
- § Today, **40% of all renovation work is mainly carried out / organized by women.**

## A rather high share of women is involved in renovation work

Q1b: Please write down the age and gender of the person who mainly deals with the realization of renovation work in your household (in %) 61





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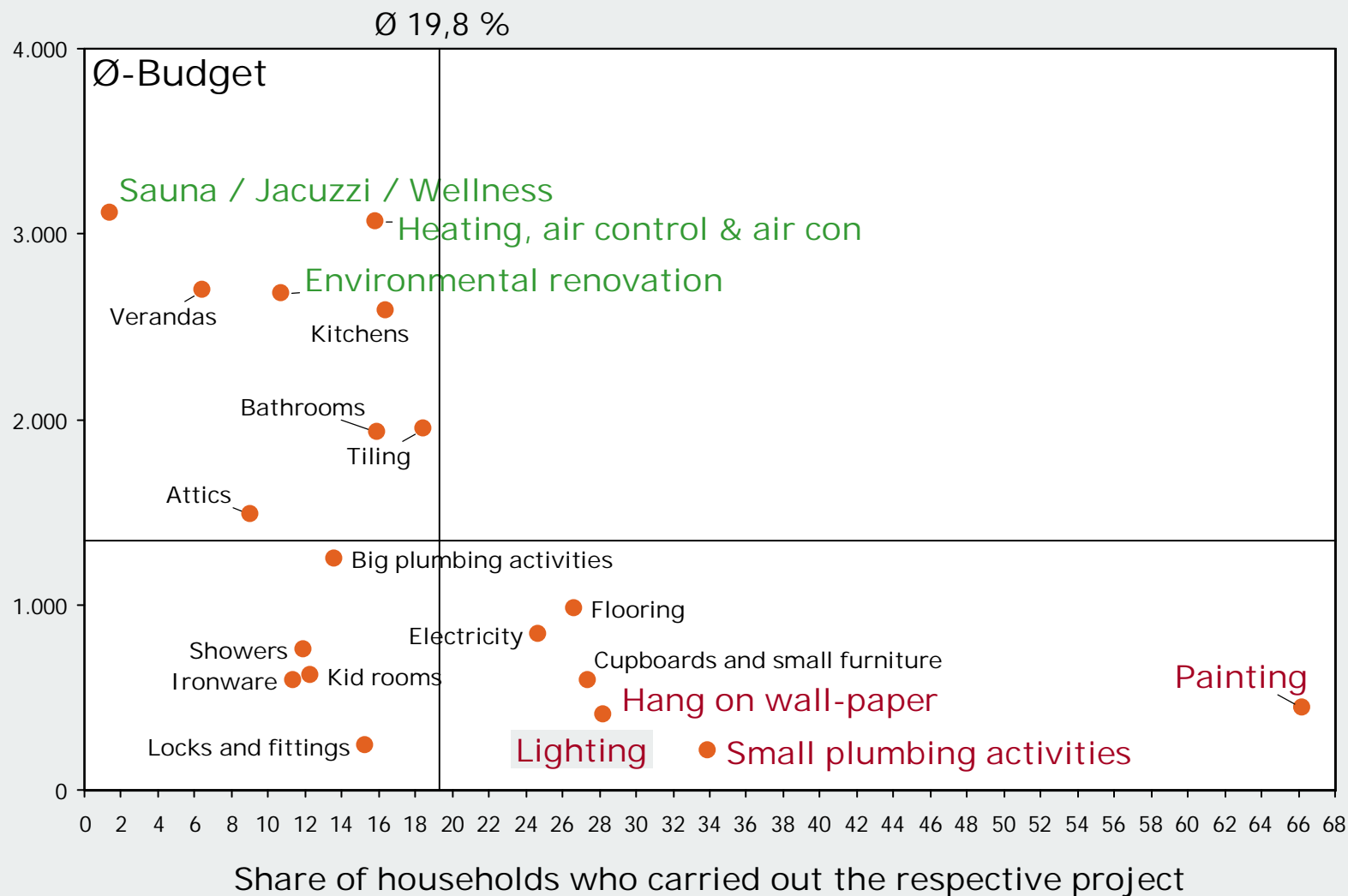
# Consumer Insights:

From Do-it-yourself to „Soft-DIY“

# A high share of people has carried out rather "soft" DIY activities, while the highest budget was invested for Wellness and Environmental / Energy activities

Total

Q6a: Which renovation jobs or projects have you undertaken or had carried out by professional craftsmen during the past 6 months? (in %) 63  
 Q6c: What was your total budget for this project, that means materials/tools and labour costs? (in €)



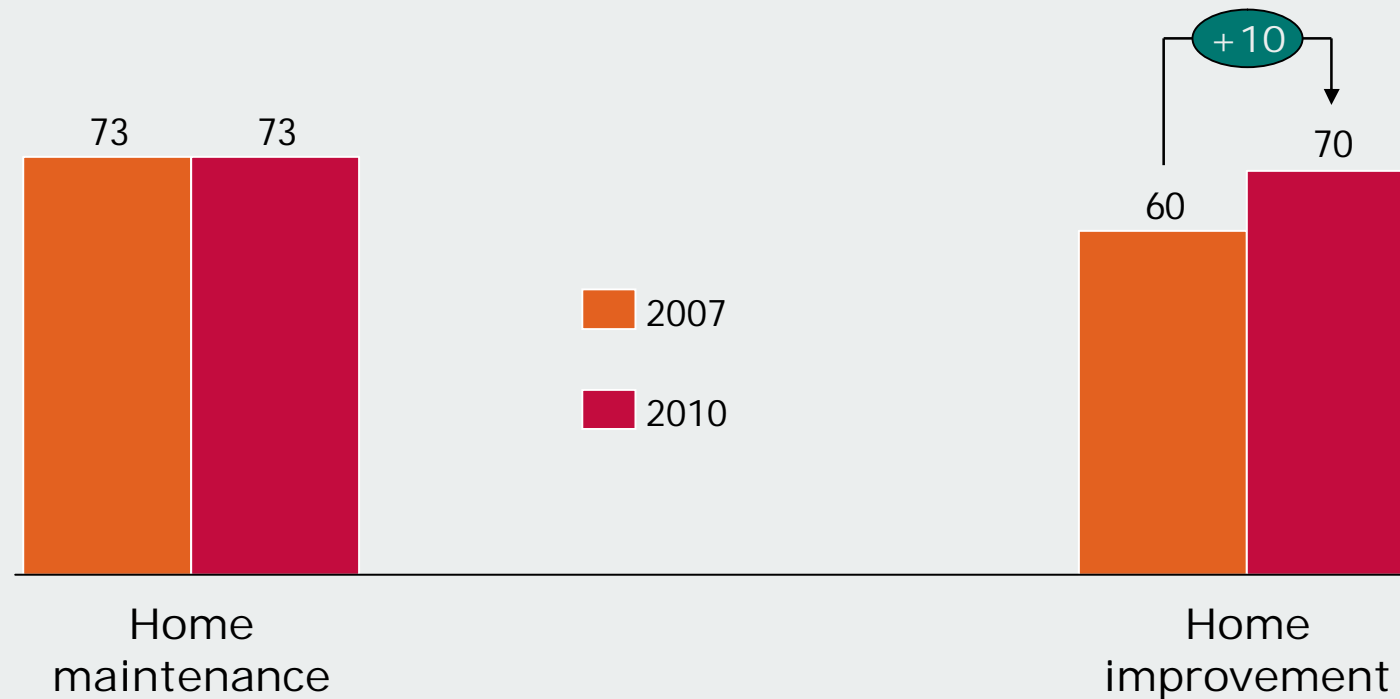


## For home improvement activities, the DIY-orientation has been growing over the last three years

Total

65

Q6g: Which percentage of each of these activities did you do yourself?



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# Consumer Insights:

Information seeking process

## Key-Findings

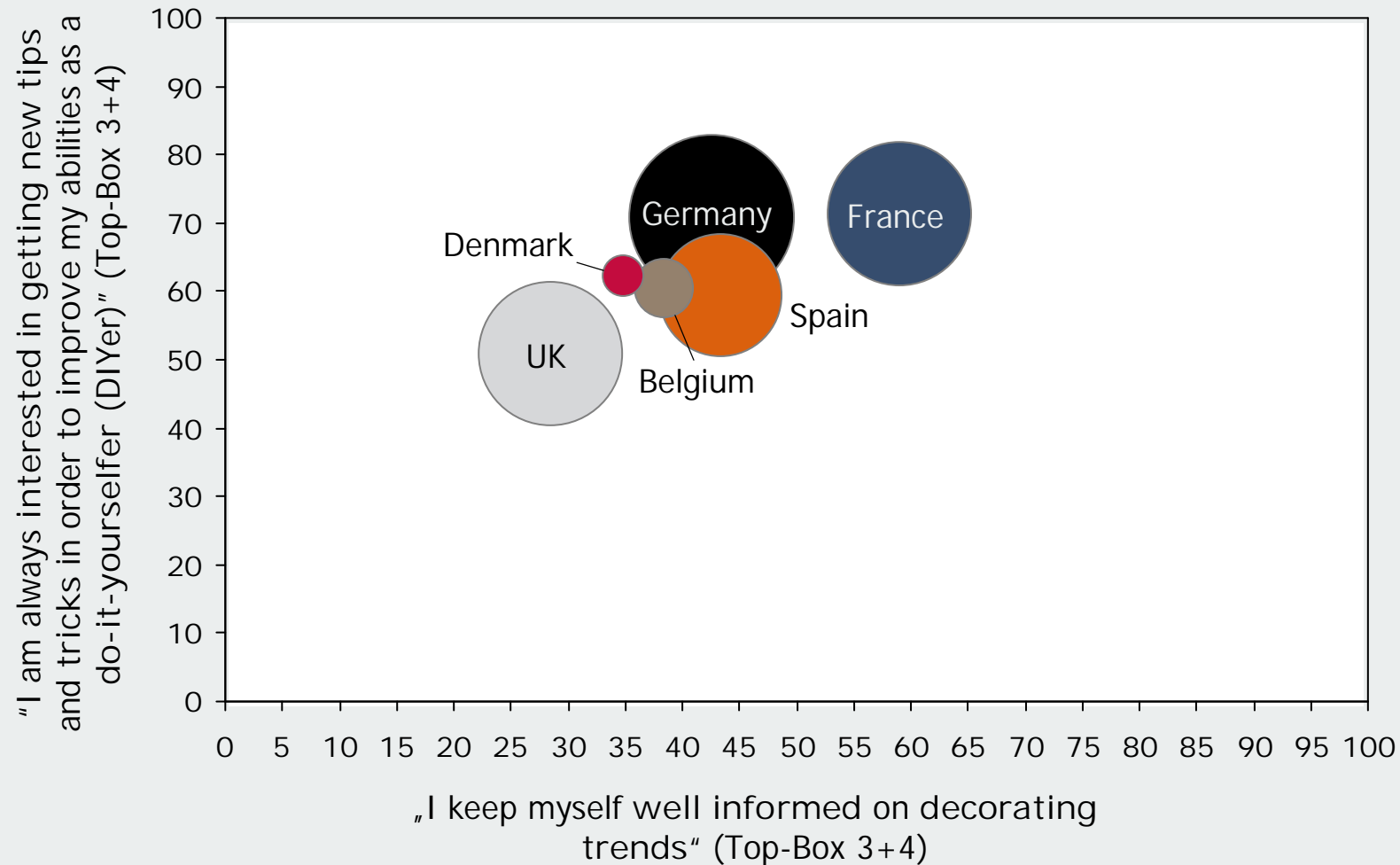
67

- § Especially in Germany and France, but also in the other countries, **people are very keen in catching up with new trends** and tricks in order to improve their DIY abilities.
- § Especially **in France, people keep themselves well informed about decorating** trends, while in the UK, people are obviously less interested in improving their skills.

## Especially French people are very keen to catch up with the latest trends, tips and tricks concerning home improvement

Q4d: In the following you will find statements about the topics of decorating and renovation. How strongly do you agree to these statements?

For this scale, 1 = "I don't agree at all" and 4 = "I agree completely". (Top-Box 3+4; in %)



## Key-Findings

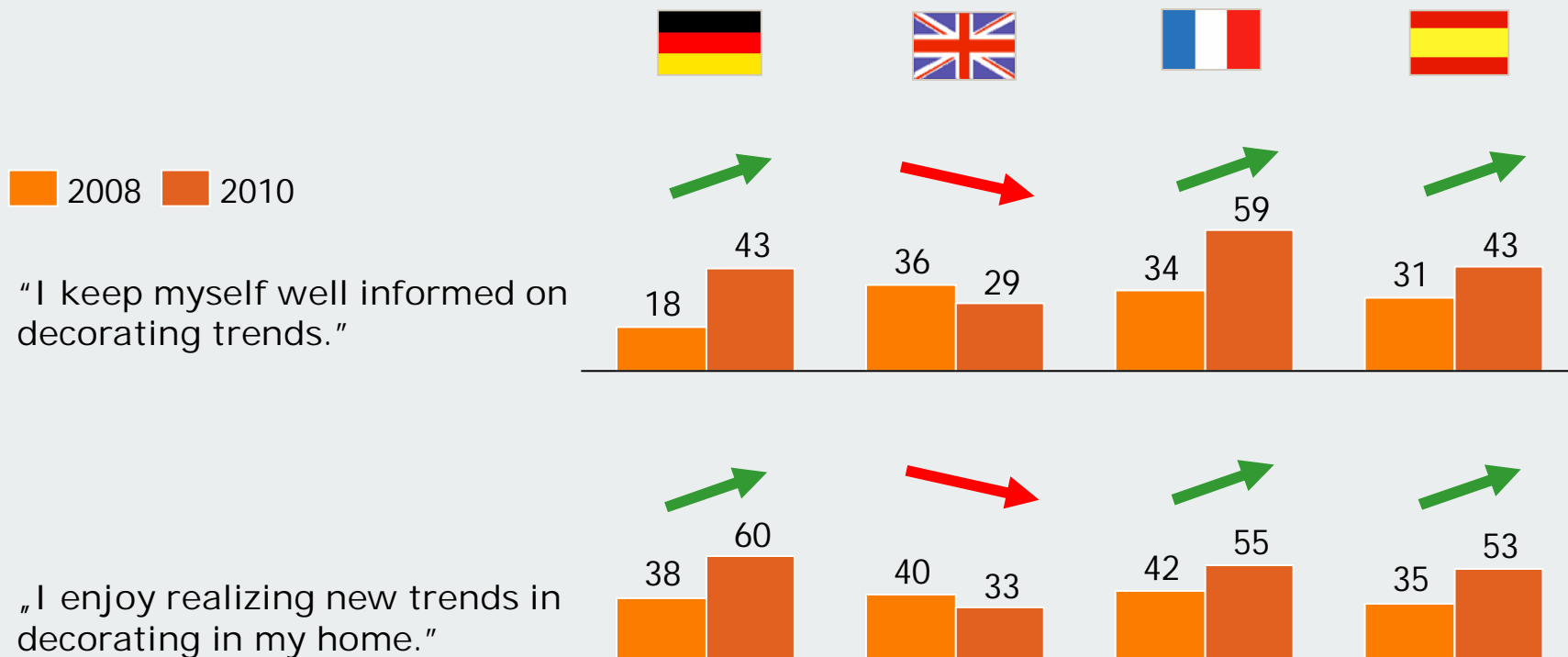
69

- § Especially in Germany and France, but also in the other countries, people are very keen in catching up with new trends and tricks in order to improve their DIY abilities.
- § Especially in France, people keep themselves well informed about decorating trends, while in the UK, people are obviously less interested in improving their skills.
- § While the **interest in decoration tips has increased** in all other comparable countries, in the UK it even decreased.

In Germany, France and Spain there is a more intensive information seeking behaviour when it comes to decorating trends than in 2007.

70

Q4d: In the following you will find statements about the topics of decorating and renovation. How strongly do you agree to these statements? (1 = "I don't agree at all" and 4 = "I agree completely") (Top-Box 3+4; in %)



## Key-Findings

71

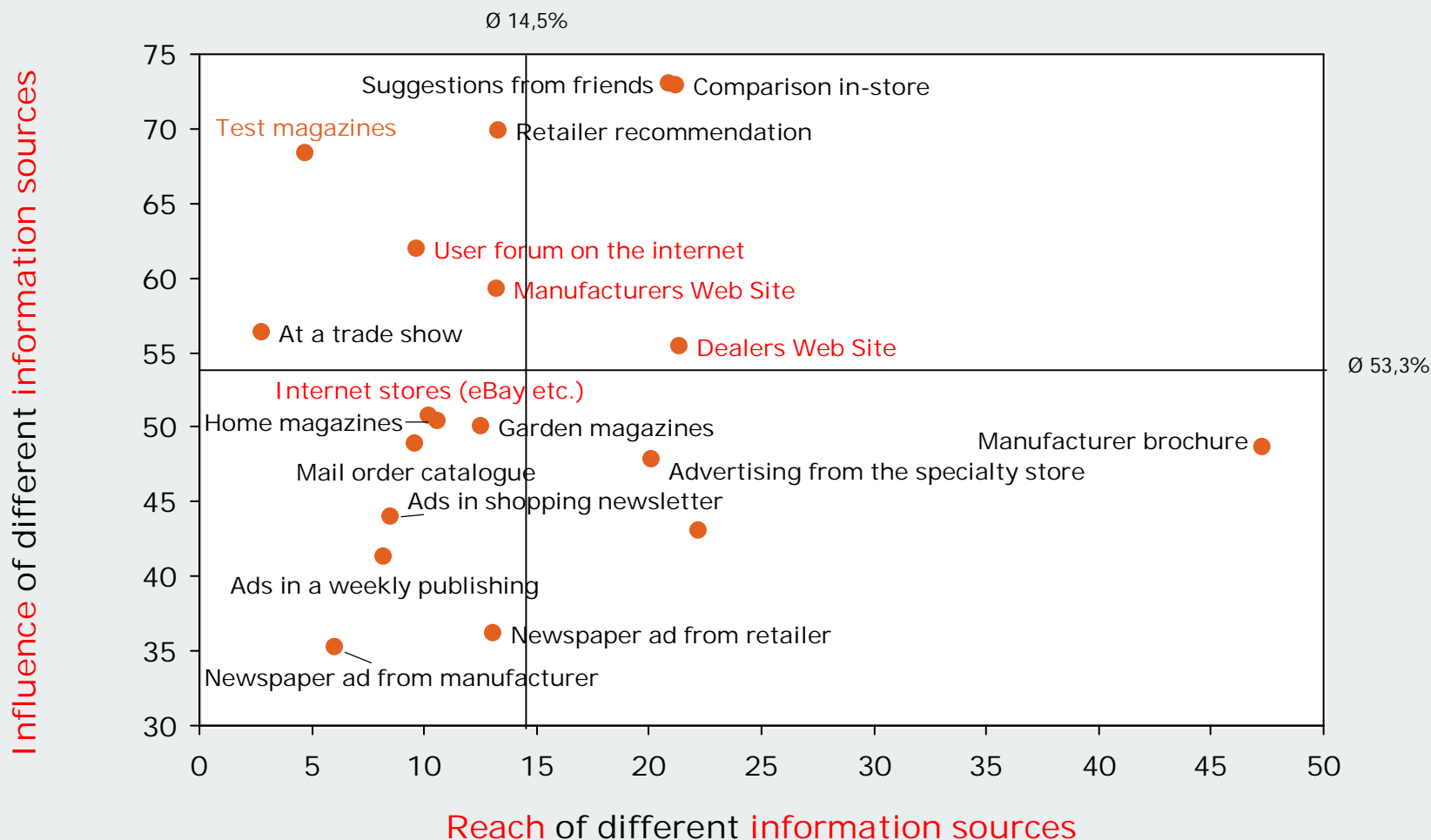
- § Especially in Germany and France, but also in the other countries, people are very keen in catching up with new trends and tricks in order to improve their DIY abilities.
- § Especially in France, people keep themselves well informed about decorating trends, while in the UK, people are obviously less interested in improving their skills.
- § While the interest in decoration tips has increased in all other comparable countries, in the UK it did even decrease.
- § **Brochures** of the manufacturer **and ads in newspapers** do **reach the most people** who keep themselves informed about the topic of home improvement.
- § Nevertheless – besides recommendation from friends or sales staff – **test magazines and the internet do have a higher influence** in the purchase decision.

# Even though only dealer websites have a high reach, the internet has great influence in the purchase decision

Total

72

Q11a: Where or how were you informed about your last DIY / home improvement/ garden purchase or new products? (in %)  
 Q11b: How much did this information influence your purchasing decision? (in %)



## Key-Findings

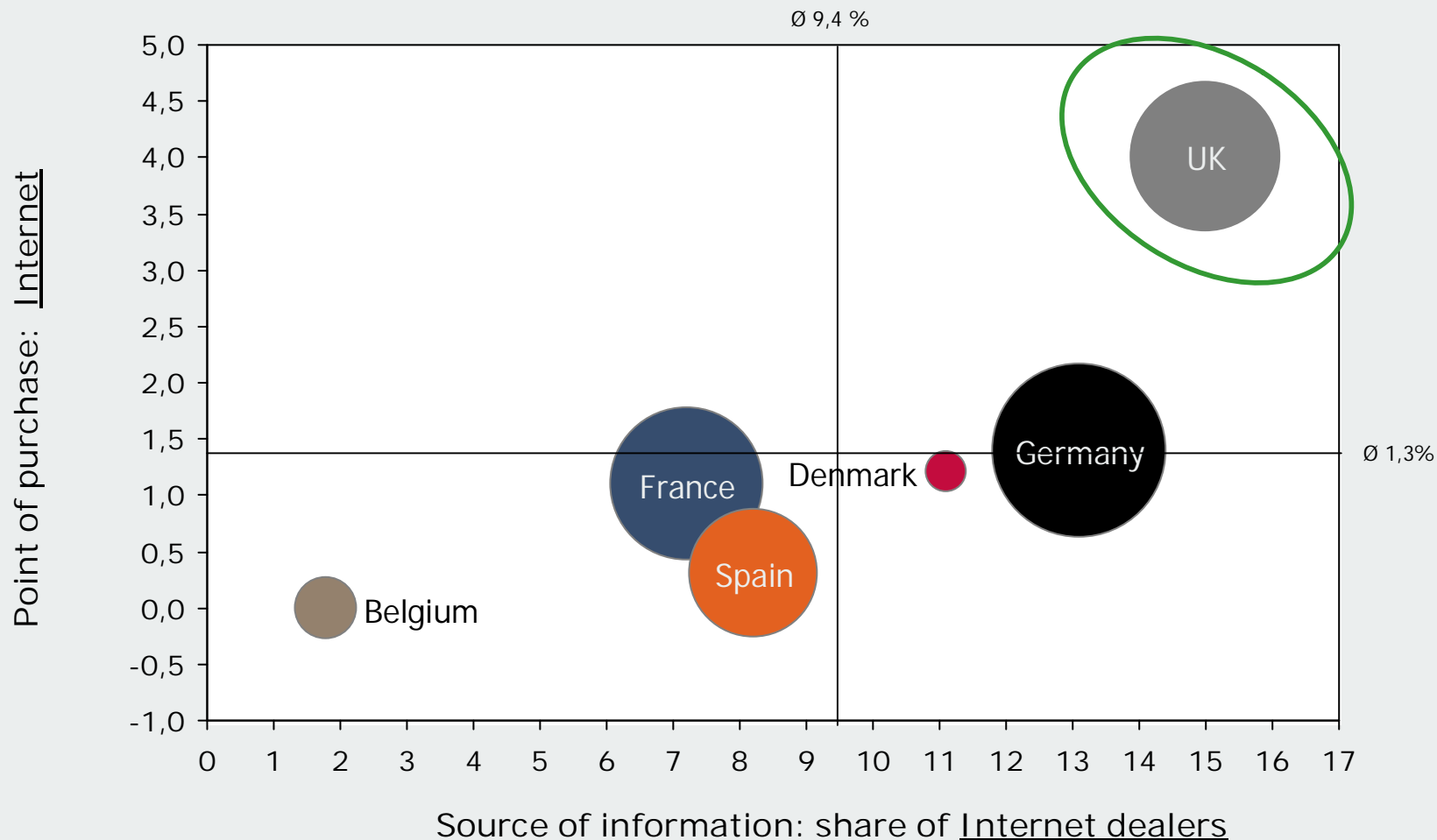
73

- § Especially in Germany and France, but also in the other countries, people are very keen in catching up with new trends and tricks in order to improve their DIY abilities.
- § Especially in France, people keep themselves well informed about decorating trends, while in the UK, people are obviously less interested in improving their skills.
- § While the interest in decoration tips has increased in all other comparable countries, in the UK it did even decrease.
- § Brochures of the manufacturer and ads in newspapers do reach the most people who keep themselves informed about the topic of home improvement.
- § Nevertheless – besides recommendation from friends or sales staff – test magazines and the internet do have a higher influence in the purchase decision.
- § On a very low base, **UK has the highest share of both people who search for information concerning DIY on the internet as well as people who are already buying DIY products online.**

## The UK has a comparably high relation of sourcing information in internet stores and purchasing via internet

Q11a: Where or how were you informed about your last DIY / home improvement/ garden purchase or new products? (in %)  
Q9e: Regardless of which area, which provider do you prefer? (in %)

74



## Key-Findings

75

- § Especially in Germany and France, but also in the other countries, people are very keen in catching up with new trends and tricks in order to improve their DIY abilities.
- § Especially in France, people keep themselves well informed about decorating trends, while in the UK, people are obviously less interested in improving their skills.
- § While the interest in decoration tips has increased in all other comparable countries, in the UK it did even decrease.
- § Brochures of the manufacturer and ads in newspapers do reach the most people who keep themselves informed about the topic of home improvement.
- § Nevertheless – besides recommendation from friends or sales staff – test magazines and the internet do have a higher influence in the purchase decision.
- § On a very low base, UK has the highest share of both people who search for information concerning DIY on the internet as well as people who are already buying DIY products online.
- § **Fighting for the online consumers** on the example of Germany, the **DIY stores are in an improvable position** concerning reach and retention.

# Reach vs. Retention Rate: dealer websites in the area of home improvement February 2010

Reach February 2010 (User) vs. Retention (share of users that visited January and February in %)

Retention in %



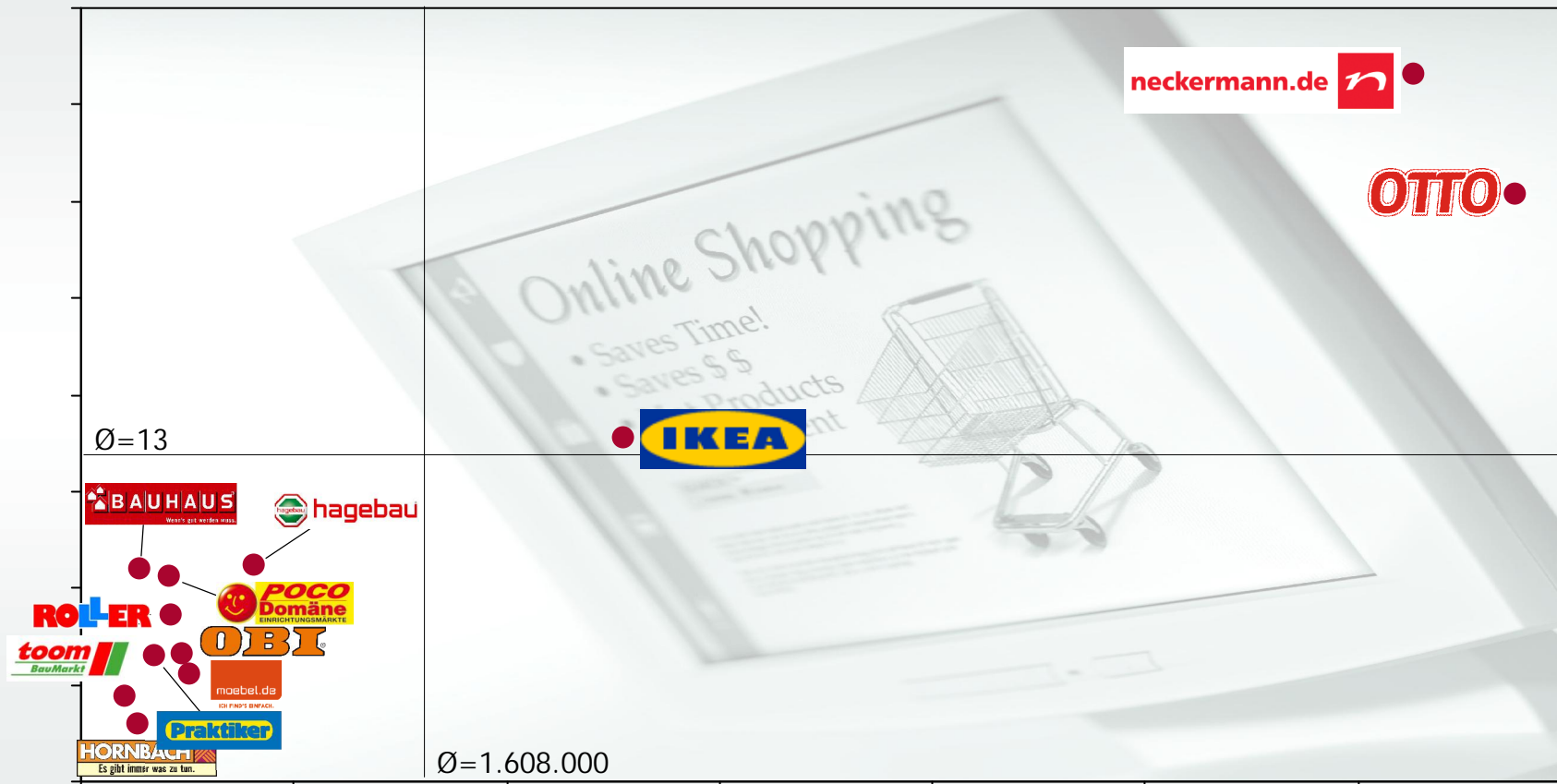
Reach / User of the respective website



# Reach vs. Retention Rate: dealer websites in the area of home improvement February 2010

Reach February 2010 (User) vs. Retention (share of users that visited January and February in %)

Retention in %



Reach / User of the respective website

Source: GfK WebEfficiencyPanel / GfK DIY-WebMonitor, GfK Living & Retail



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## Consumer Insights:

It is not about cheap prices – it is about „more fore less“

## Key-Findings

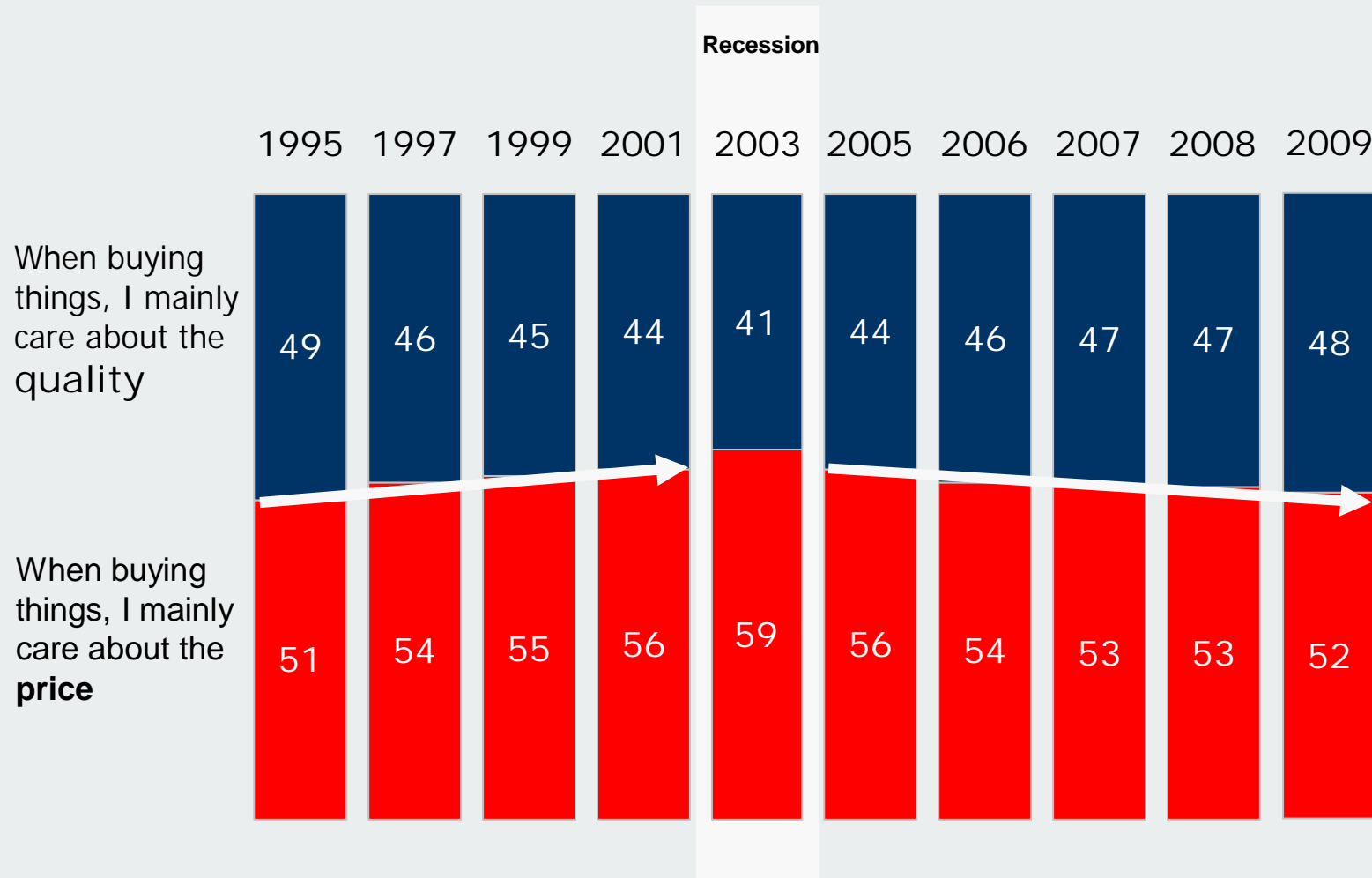
§ Despite the crisis **quality is getting more and more important** (again).

79

## The quality orientation is growing - regardless of the crisis

- In % -

80



Source: 20.000 households within the GfK Consumer Panel in Germany

## Key-Findings

81

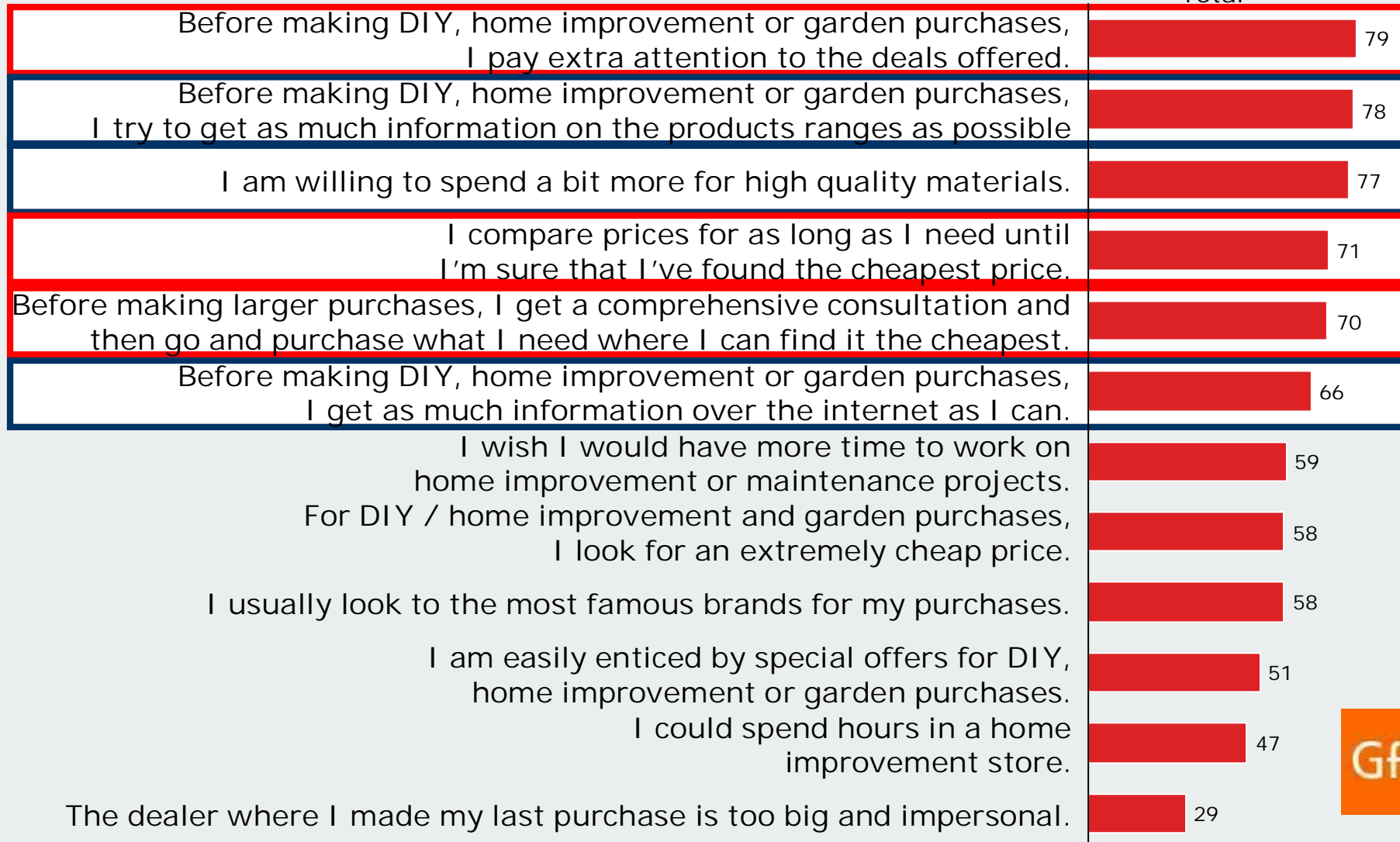
- § Despite the crisis quality is getting more and more important (again).
- § Nevertheless, there is not a price orientation on the one hand and a quality orientation on the other:
  - § 79% pay **extra attention to special offers**
  - § 71% compare prices for as long as they need to **make sure** to have **found the cheapest** price
  - § almost **the same** share (77%) **is willing to spend more** for high quality materials

Around 80 % look for special deals and try to get as much information as they can on the products before making a purchase decision

82

Q14: In the following you will find statements about DIY / home improvement and gardening. To what extent do you agree to the statements? (1 = "Do not agree at all" and 4= "Agree completely") (Top-Box 3+4; in %)

Total



## Key-Findings

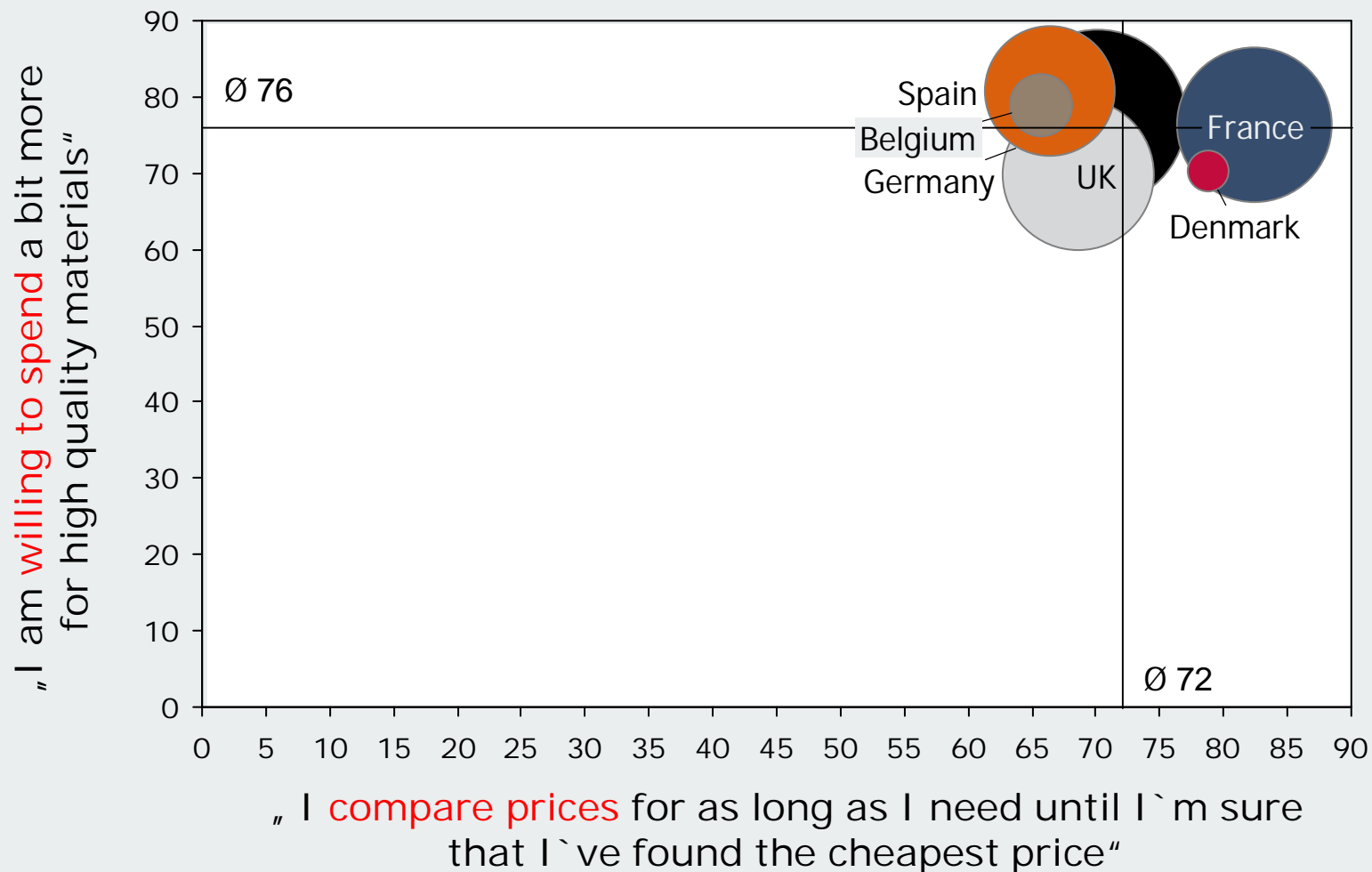
83

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  - § 79% pay extra attention to special offers
  - § 71% compare prices for as long as they need to make sure to have found the cheapest price
  - § almost the same share (77%) is willing to spend more for high quality materials
- § An analysis of the information and purchase behaviour shows that **end consumers** of all respective countries **are not looking for cheap but “more for less”**.

## Its not just a good price, its "more for less" that is demanded by end-consumers

Q14: In the following you will find statements about DIY / home improvement and gardening. To what extent do you agree to the statements? (1 = "Do not agree at all" and 4= "Agree completely") (Top-Box 3+4; in %)

84



## Key-Findings

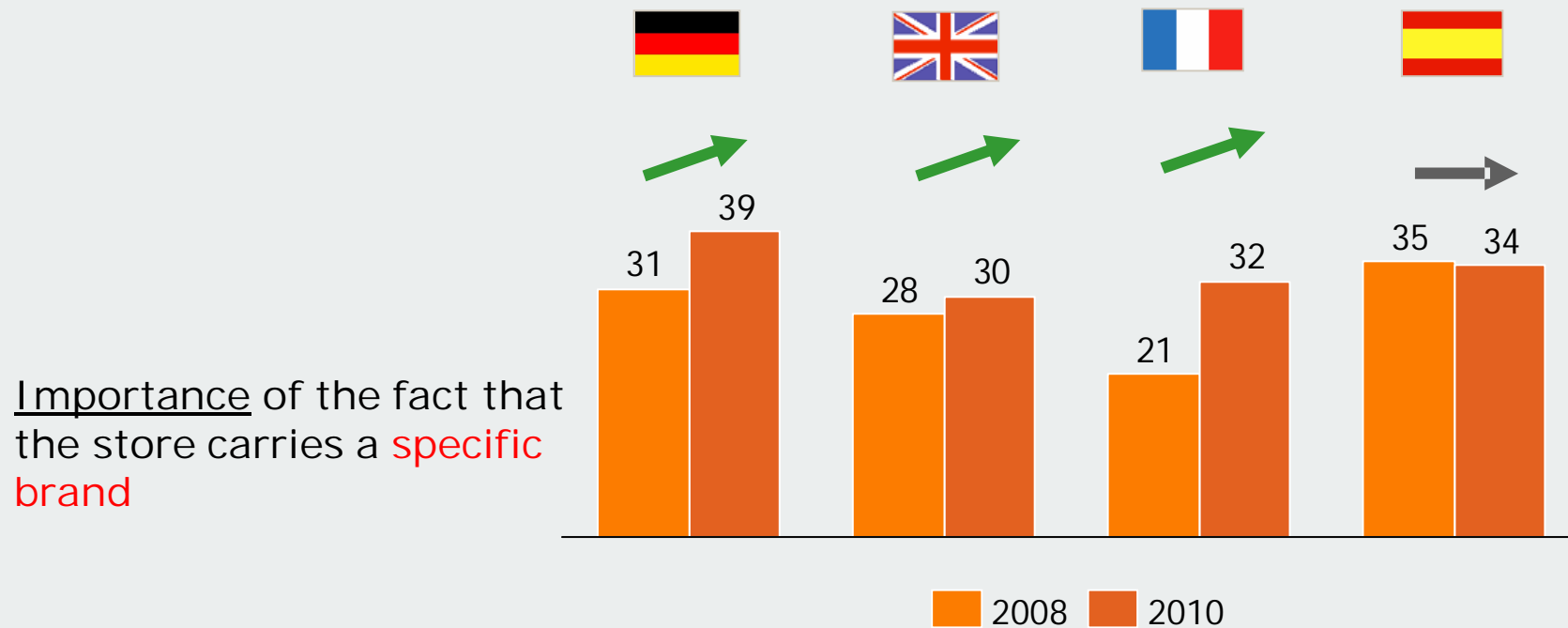
85

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  - § almost the same share (77%) is willing to spend more for high quality materials
- § An analysis of the information and purchase behaviour shows that end consumers of all respective countries are not looking for cheap but “more for less”.
- § Due to a higher quality orientation **the importance of brands is increasing.**

## Especially brands are getting more important in the DIY, craftwork and gardening sectors

Q10a: How important are the following aspects to your decision to shop for consumer goods in the area of Do-it-yourself, craftwork and gardening? (1 = not at all important, 5 = very important) (Top-Box 3+4; in %)

86



## Key-Findings

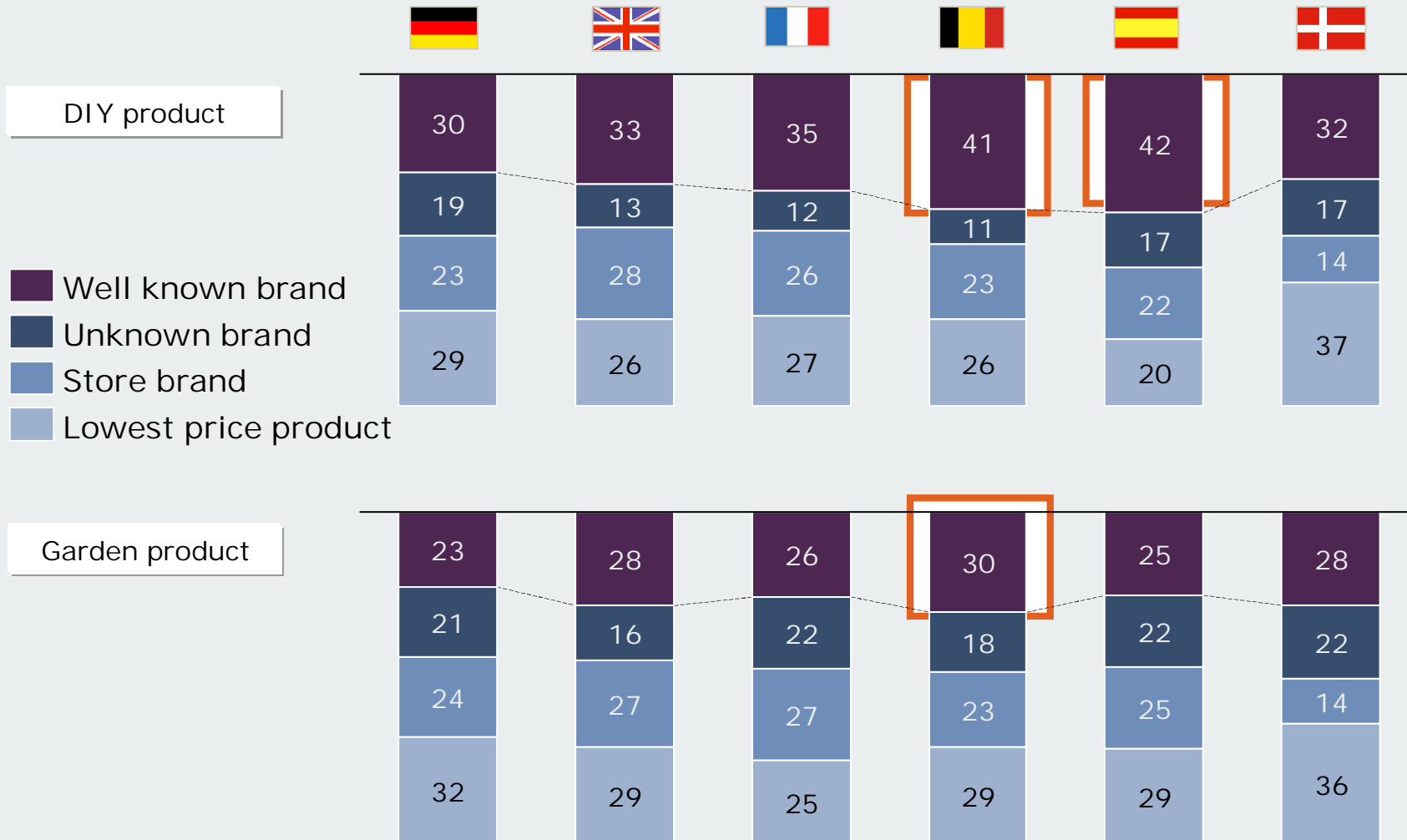
87

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- § An analysis of the information and purchase behaviour shows that end consumers of all respective countries are not looking for cheap but “more for less”.
- § Due to a higher quality orientation the importance of brands is increasing.
- § Therefore, **well known brands are** – in the awareness of end-consumers – **chosen in one of three DIY purchases.**

# Well known brands are chosen in one of three DIY purchases



Q12: Which of the following describes best the DIY/ garden product you purchased most recently? (in %)



## Key-Findings

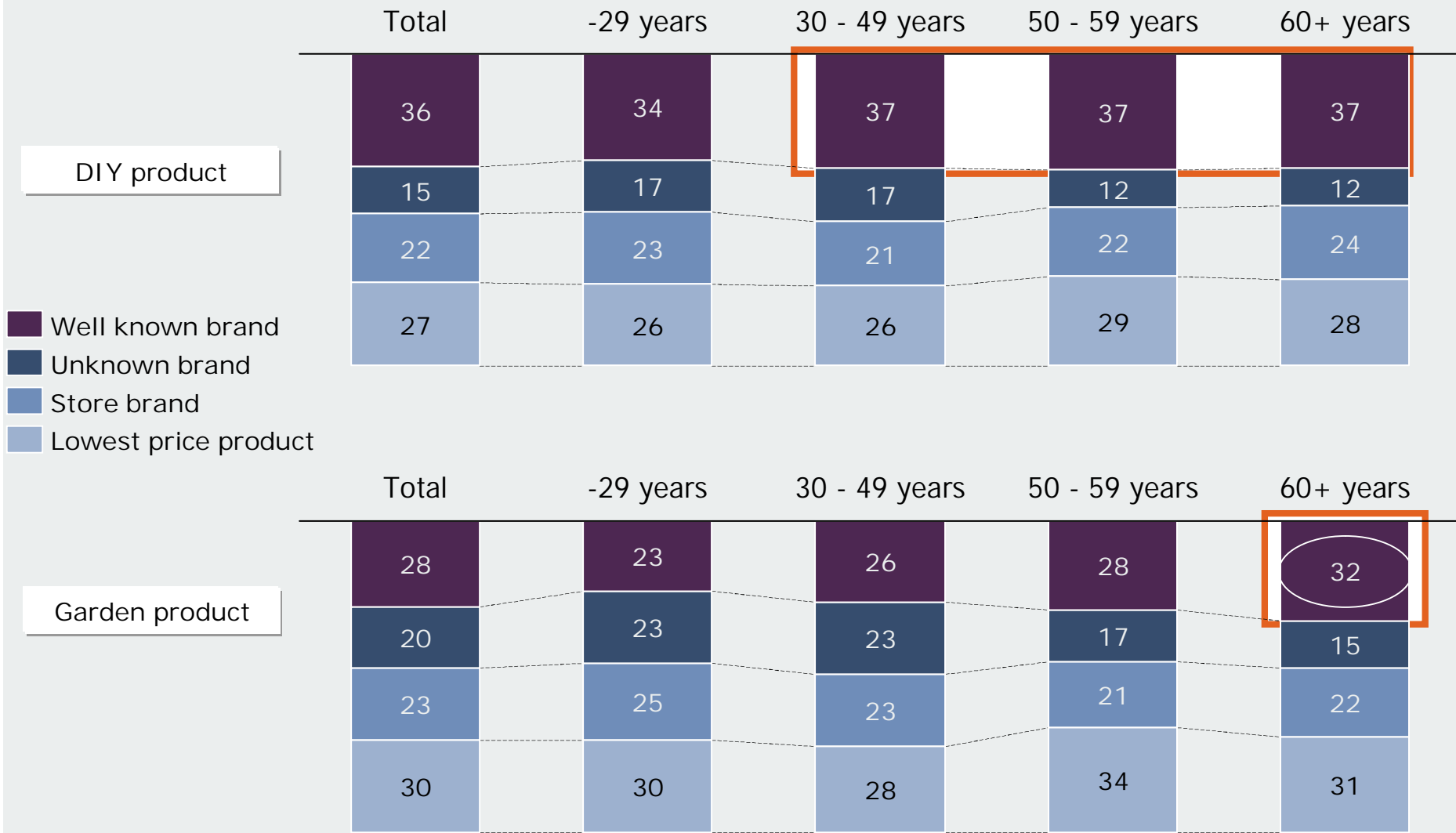
89

- § Despite the crisis quality is getting more and more important (again).
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  - § almost the same share (77%) is willing to spend more for high quality materials
- § An analysis of the information and purchase behaviour shows that end consumers of all respective countries are not looking for cheap but “more for less”.
- § Due to a higher quality orientation the importance of brands is increasing.
- § Therefore, well known brands are – in the awareness of end-consumers – chosen in one of three DIY purchases.
- § Especially in the area of garden products, the older target groups are buying well known brands more often.

# Older renovators tend to have a higher affinity for well known brand products



Q12: Which of the following describes best the DIY/ garden product you purchased most recently? (in %)





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# Performance:

Current performance of brands and manufacturers

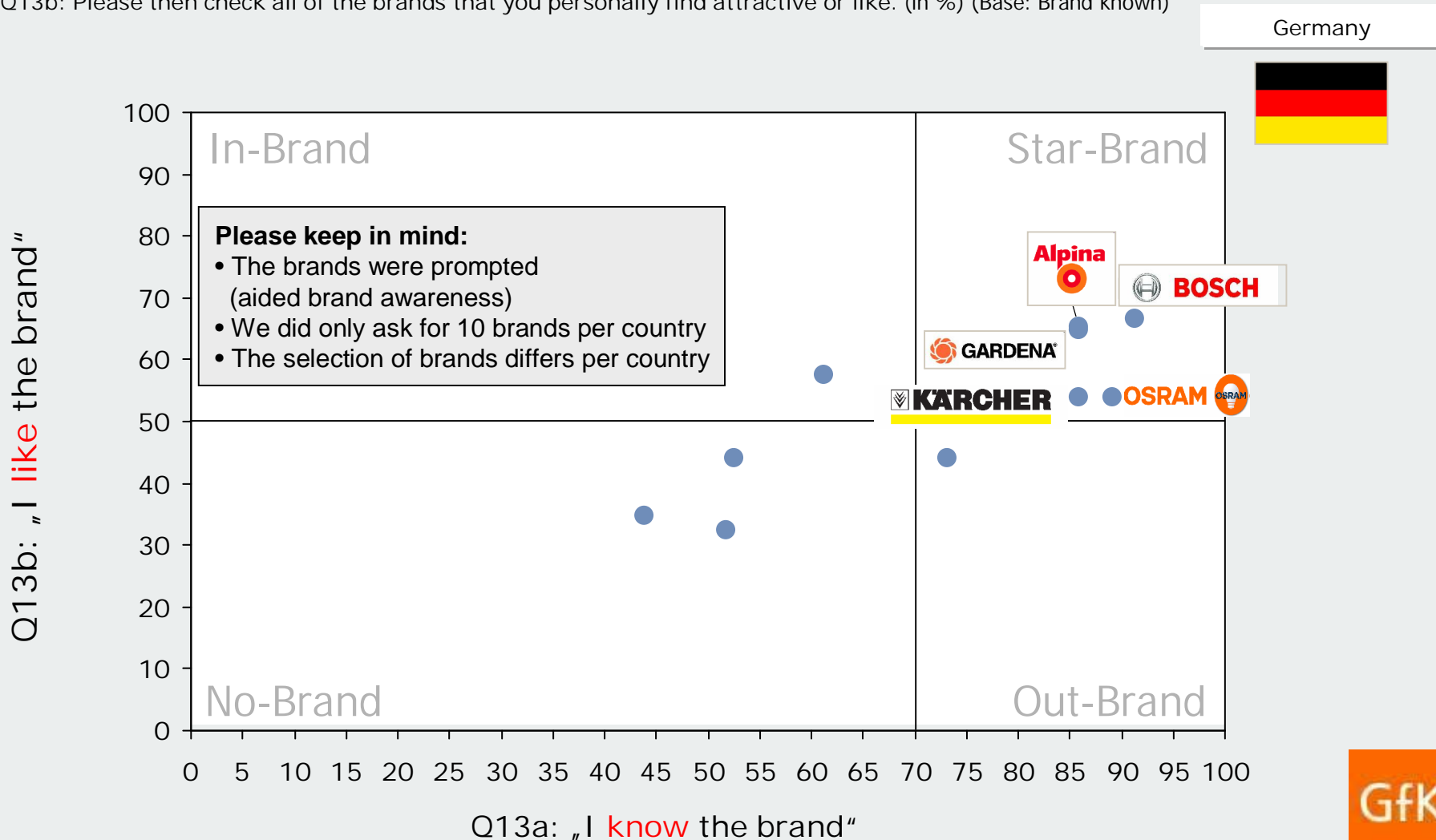
## Key-Findings



§ Among all covered countries **we were able to find "Star Brands"** that differ of course from country to country.

# In Germany, Bosch, Alpina and Gardena are the DIY-/gardening brands that are appreciated most

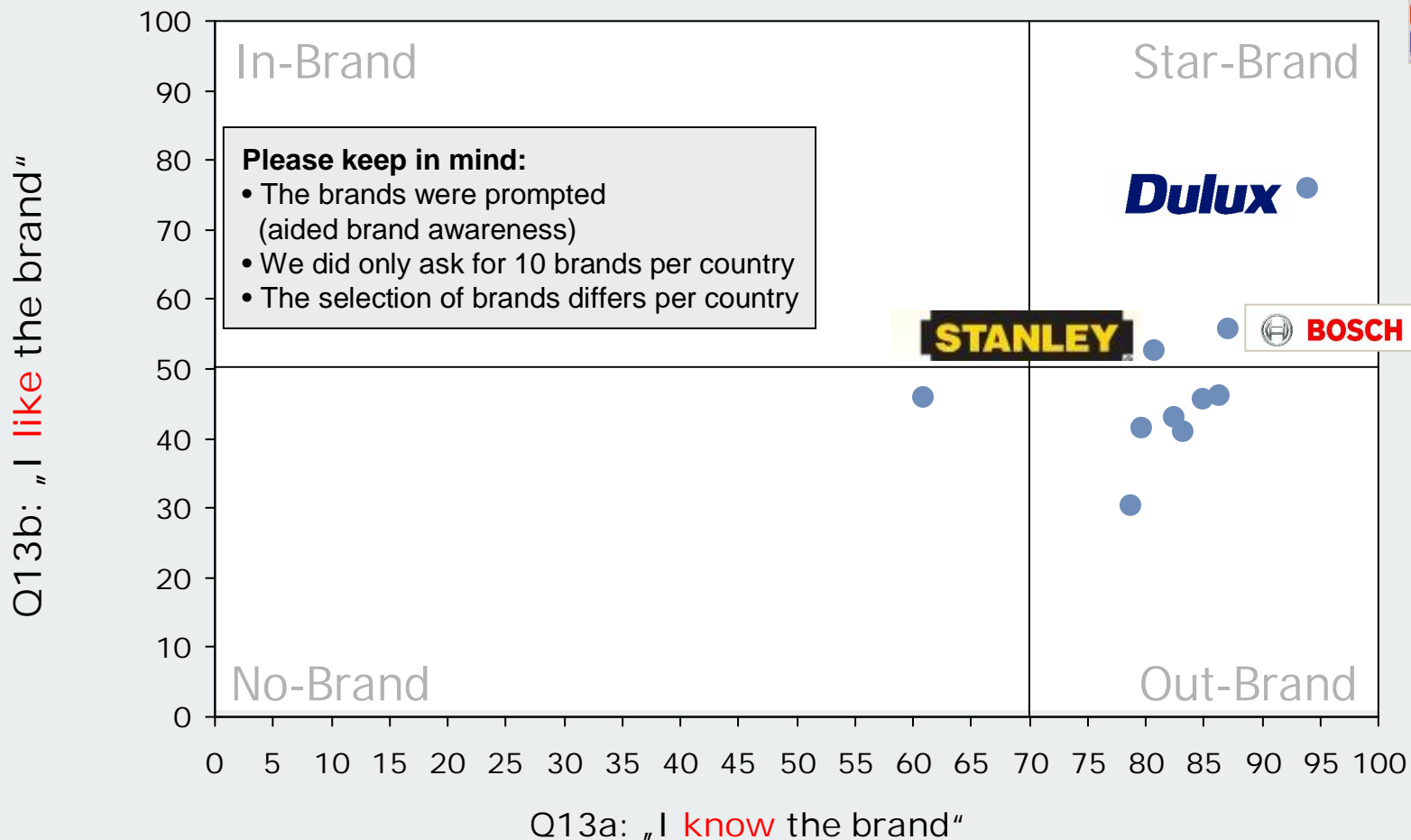
Q13a: Please check all of the following brands that are listed which you know - even only by name. (in %)  
 Q13b: Please then check all of the brands that you personally find attractive or like. (in %) (Base: Brand known)



# UK's star brands in the DIY-/gardening sector are Dulux and Bosch

Q13a: Please check all of the following brands that are listed which you know - even only by name. (in %)  
 Q13b: Please then check all of the brands that you personally find attractive or like. (in %) (Base: Brand known)

UK



Please find further country results in the **Complete Report**

Q13a: Please check all of the following brands that are listed which you know - even only by name. (in %)

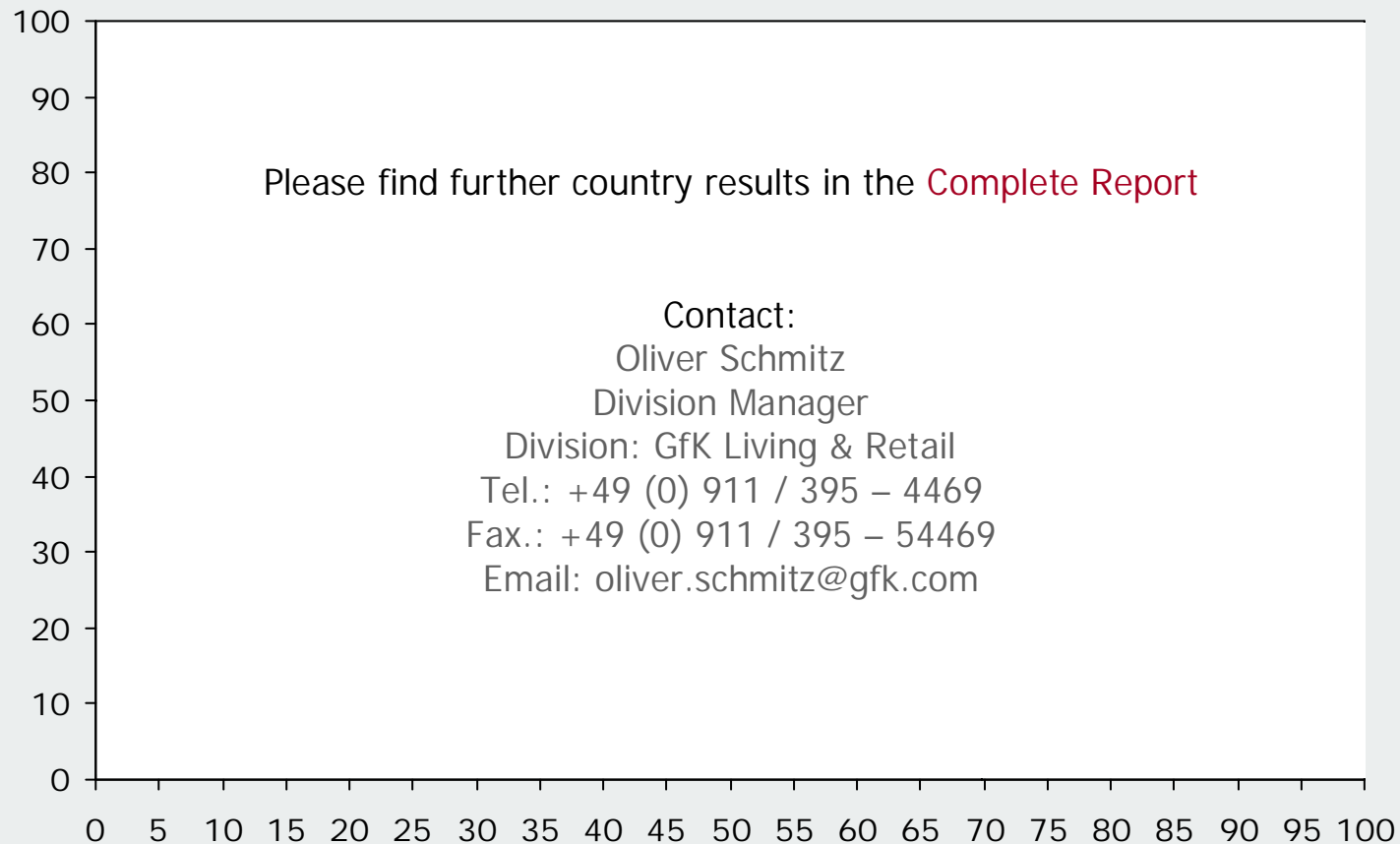
Q13b: Please then check all of the brands that you personally find attractive or like. (in %) (Base: Brand known)

95

France



Q13b: „I like the brand“



Q13a: „I know the brand“

GfK

Please find further country results in the **Complete Report**

Q13a: Please check all of the following brands that are listed which you know - even only by name. (in %)

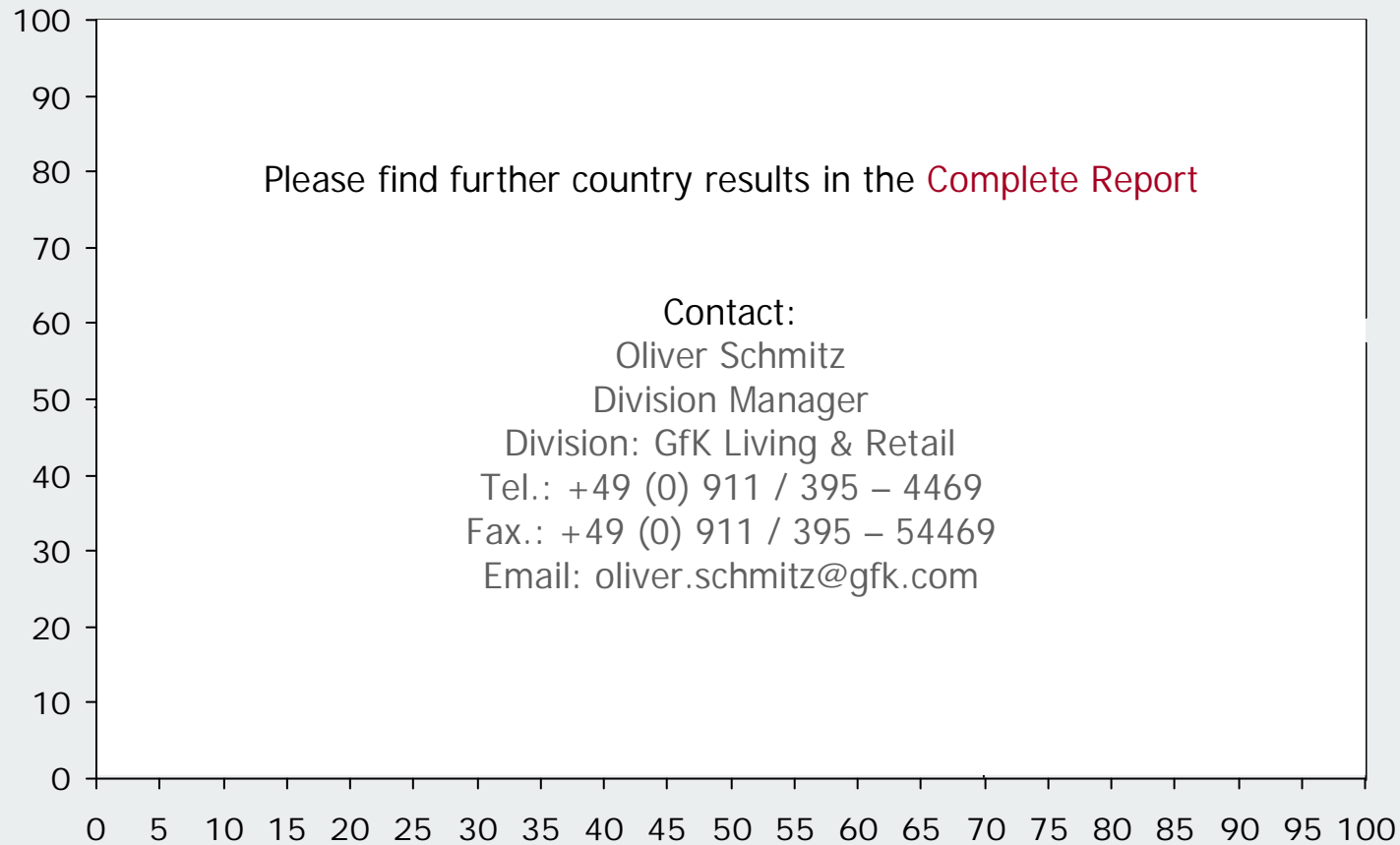
Q13b: Please then check all of the brands that you personally find attractive or like. (in %) (Base: Brand known)

96

Belgium



Q13b: „I like the brand“



Q13a: „I know the brand“

## Please find further country results in the **Complete Report**

Q13a: Please check all of the following brands that are listed which you know - even only by name. (in %)

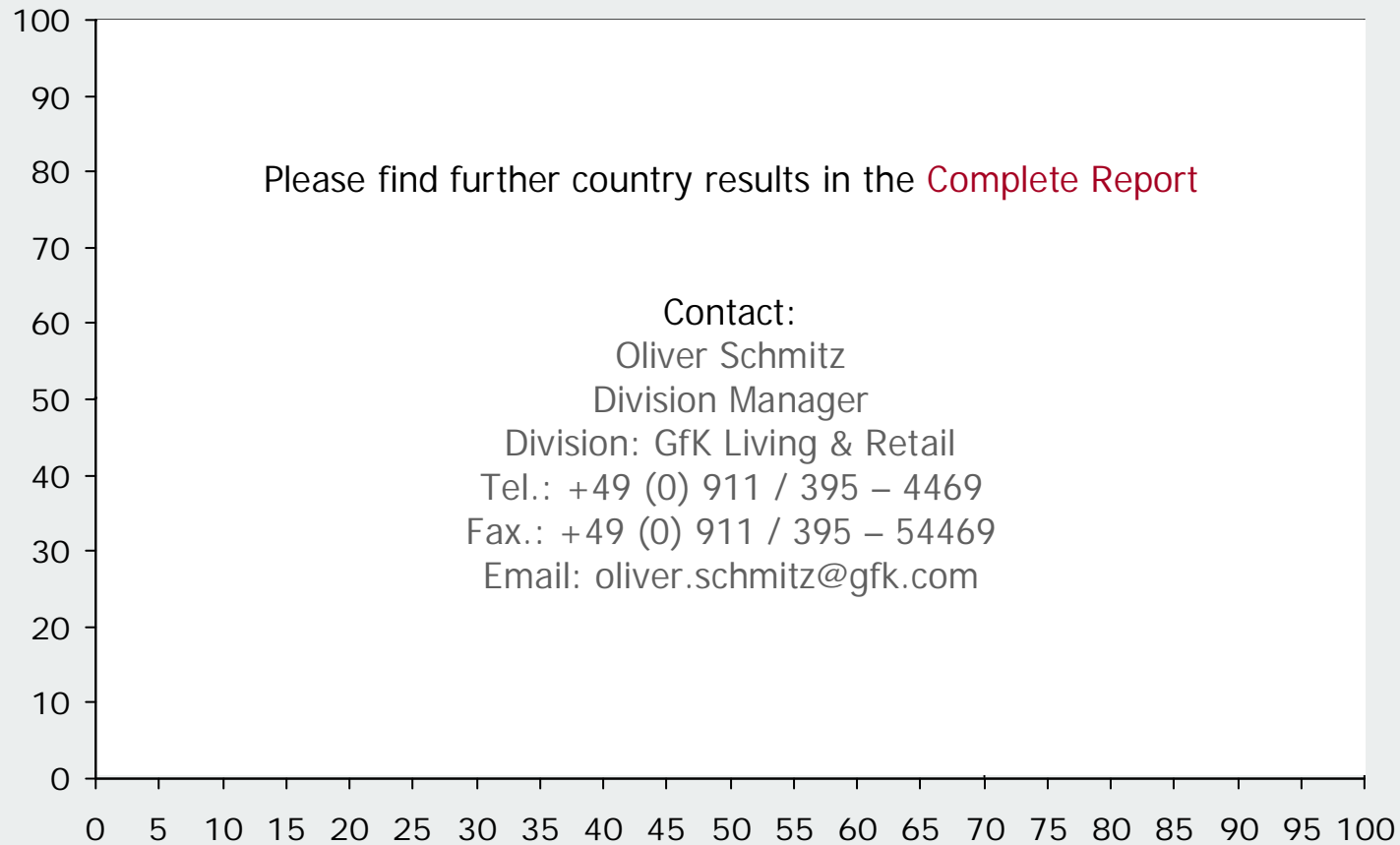
Q13b: Please then check all of the brands that you personally find attractive or like. (in %) (Base: Brand known)

97

Spain



Q13b: „I like the brand“



Q13a: „I know the brand“

GfK

# Please find further country results in the **Complete Report**

Q13a: Please check all of the following brands that are listed which you know - even only by name. (in %)  
Q13b: Please then check all of the brands that you personally find attractive or like. (in %) (Base: Brand known)

Denmark



Q13b: „I like the brand“



Q13a: „I know the brand“



## Key-Findings



- § Among all covered countries we were able to find “Star Brands” that differ of course from country to country.
- § **DIY stores are clearly the most important shopping venue** in all areas of home improvement, home maintenance and garden.
- § Due to a strong position of garden centers, gardeners and garden specialits the **DIY stores are not as strong when it comes to gardening** purchases.

## DIY-stores are clearly the most important shopping venue for home improvement, -maintenance and garden products

100

Q9b: Please mark, where you generally purchase products for home improvement or home maintenance (in %)

Q9c: Please mark where you generally purchase products for the garden (Garden furniture, garden tools, garden plants etc.) (in %)





## Key-Findings

101

- § Among all covered countries we were able to find “Star Brands” that differ of course from country to country.
- § DIY stores are clearly the most important shopping venue in all areas of home improvement, home maintenance and garden.
- § Due to a strong position of garden centers, gardeners and garden specialits the DIY stores are not as strong when it comes to gardening purchases.
- § Comparing the purchase decision criteria with the performance of the DIY stores it seems as if **the biggest gap is** between “**Information / Consultancy**” and “**Pricing / Discounts**”.

## Honesty and quality are the most important purchase criteria in the eyes of consumers

102

Q10a: How important are the following aspects to your decision to shop for consumer goods in the area of Do-it-yourself, craftwork, and gardening? (1 = "Not at all important" and 5 = "Very important") (Top-Box 3+4; in %)

Q10b: When thinking of your last purchase of DIY / home improvement and garden products at your preferred provider how satisfied were you with the store (1="Dissatisfied" and 5= "Very satisfied") (Top-Box 3+4; in %)





## Key-Findings

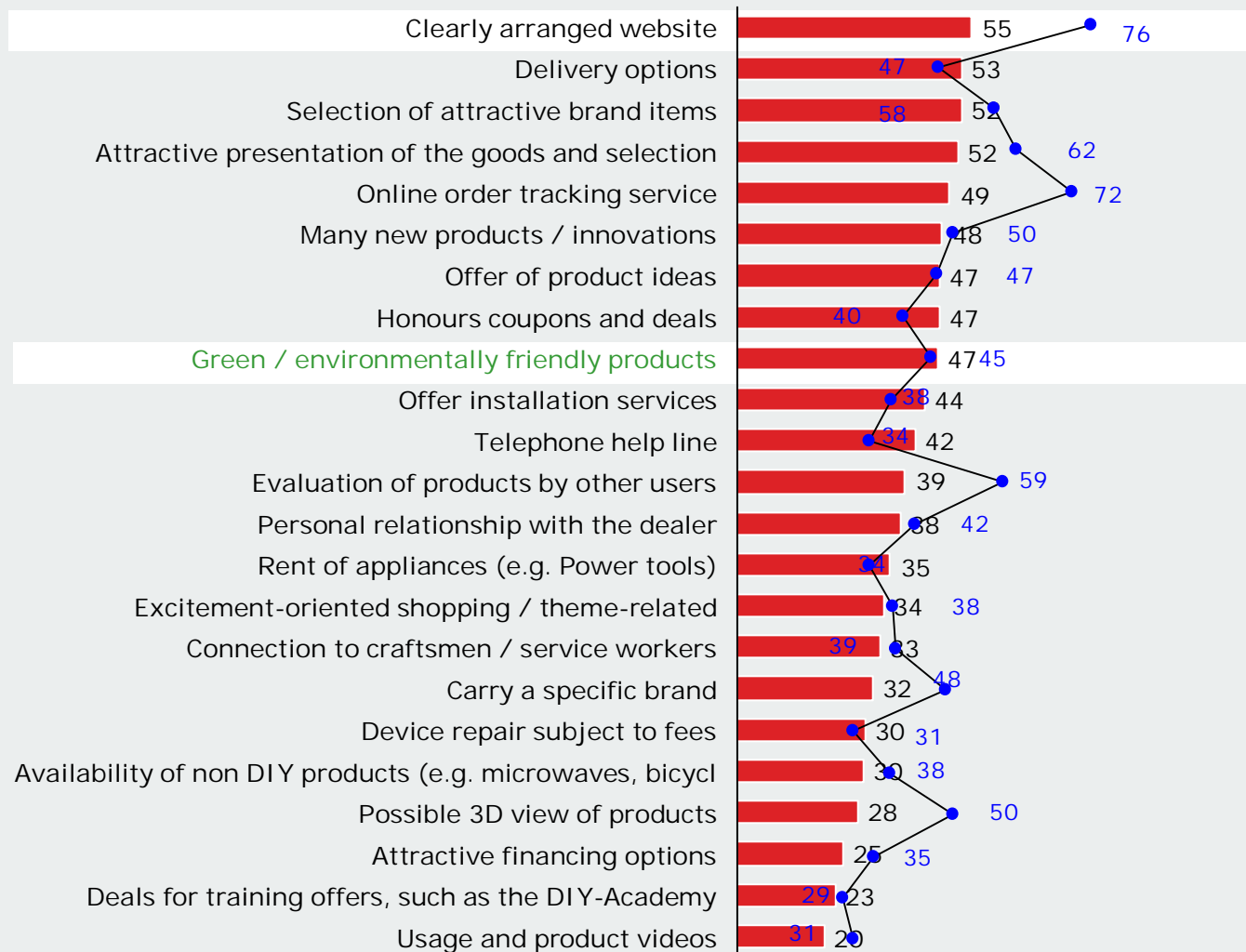
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- § DIY stores are clearly the most important shopping venue in all areas of home improvement, home maintenance and garden.
- § Due to a strong position of garden centers, gardeners and garden specialists the DIY stores are not as strong when it comes to gardening purchases.
- § Comparing the purchase decision criteria with the performance of the DIY stores it seems as if the biggest gap is between “Information / Consultancy” and “Pricing / Discounts”.
- § “Green products” are today important or very important to 47% of the end consumers.

## Green products are “only” important to 47% of the consumers and they are rather satisfied with the offer

104

Q10a: How important are the following aspects to your decision to shop for consumer goods in the area of Do-it-yourself, craftwork, and gardening? (1 = “Not at all important” and 5 = “Very important”) (Top-Box 3+4; in %)

Q10b: When thinking of your last purchase of DIY / home improvement and garden products at your preferred provider how satisfied were you with the store (1=“Dissatisfied” and 5= “Very satisfied”) (Top-Box 3+4; in %)



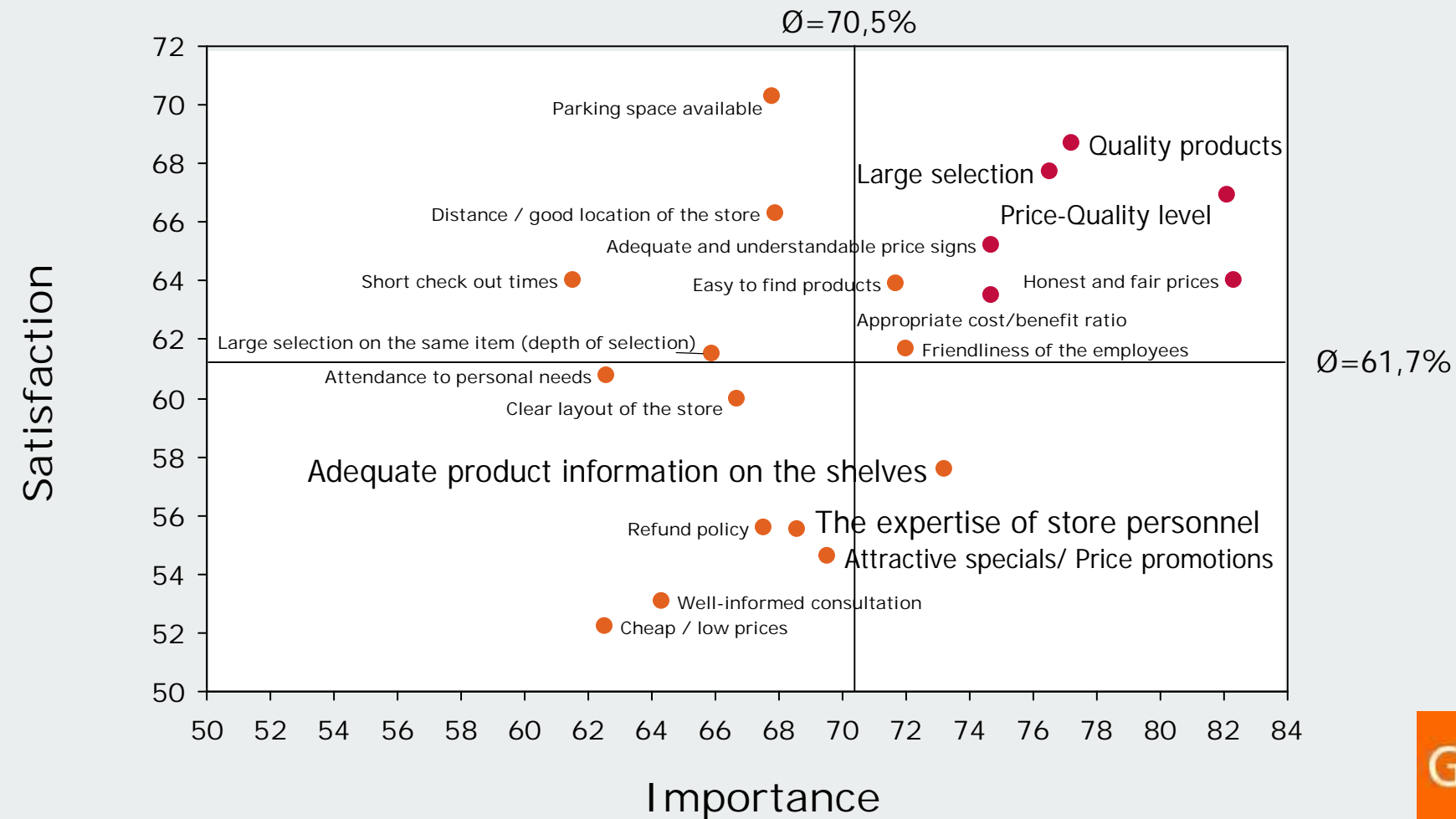
There is a gap between the expectation and satisfaction  
 - especially in product information and consultancy  
 (Top 20 of the most important criteria)

Total

105

Q10a: How important are the following aspects to your decision to shop for consumer goods in the area of Do-it-yourself, craftwork, and gardening? (1 = "Not at all important" and 5 = "Very important") (Top-Box 3+4; in %)

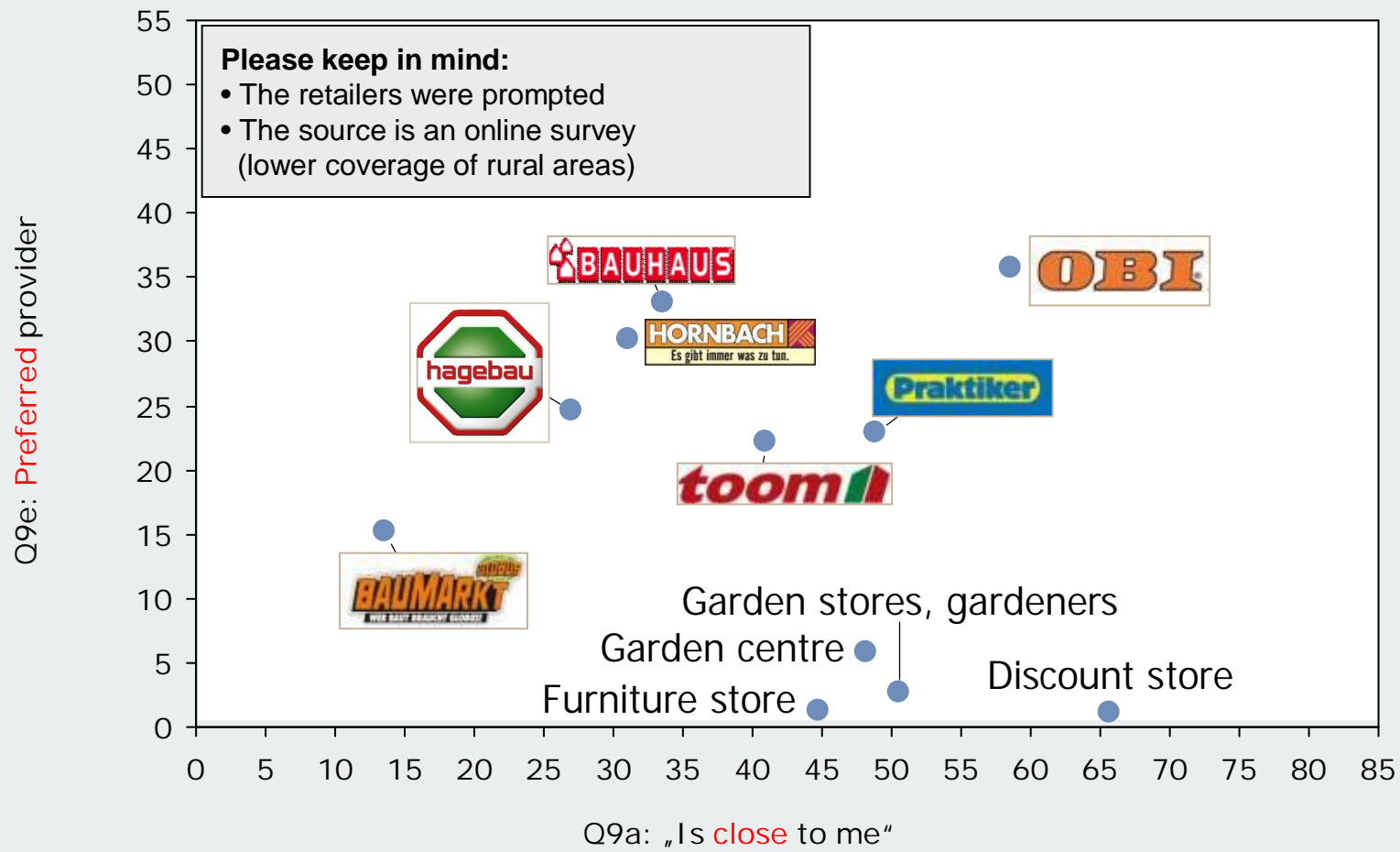
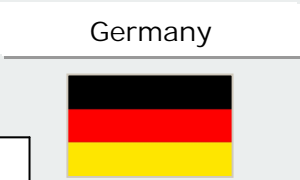
Q10b: When thinking of your last purchase of DIY / home improvement and garden products at your preferred provider how satisfied were you with the store (1="Dissatisfied" and 5= "Very satisfied") (Top-Box 3+4; in %)



# In Germany, OBI and Bauhaus are the preferred providers for DIY-/gardening products



Q9a: Please mark a check next to all the stores that are near to you (within 20 minutes by car) (in %)  
 Q9e: Regardless of which area, which provider do you prefer? (in %)





# In the UK, B&Q is the clear favourite

Q9a: Please mark a check next to all the stores that are near to you (within 20 minutes by car) (in %)  
 Q9e: Regardless of which area, which provider do you prefer? (in %)

UK





Please find further country results in the **Complete Report**

108

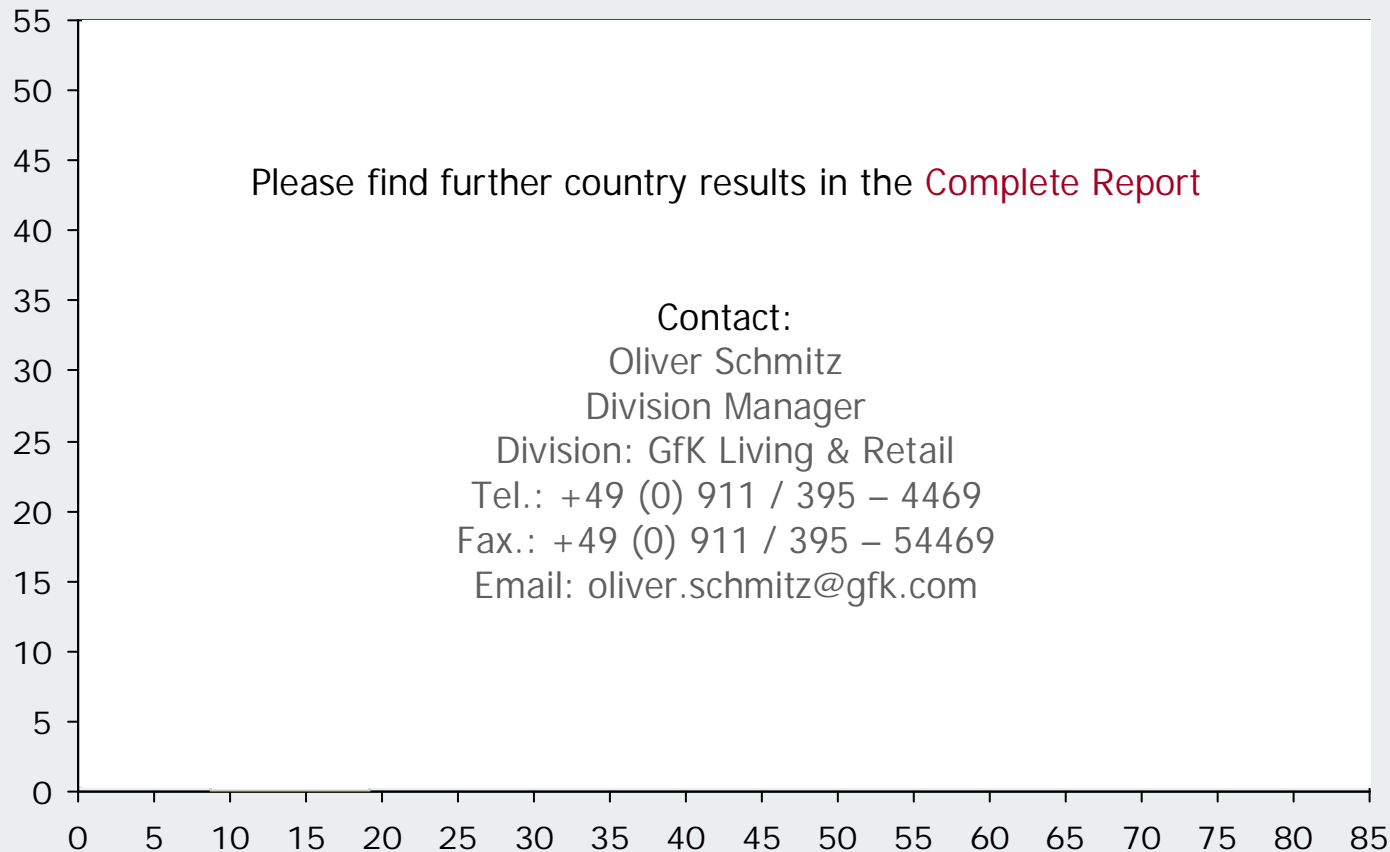
Q9a: Please mark a check next to all the stores that are near to you (within 20 minutes by car) (in %)

Q9e: Regardless of which area, which provider do you prefer? (in %)

France



Q9e: Preferred provider



Q9a: „Is close to me“



Please find further country results in the **Complete Report**

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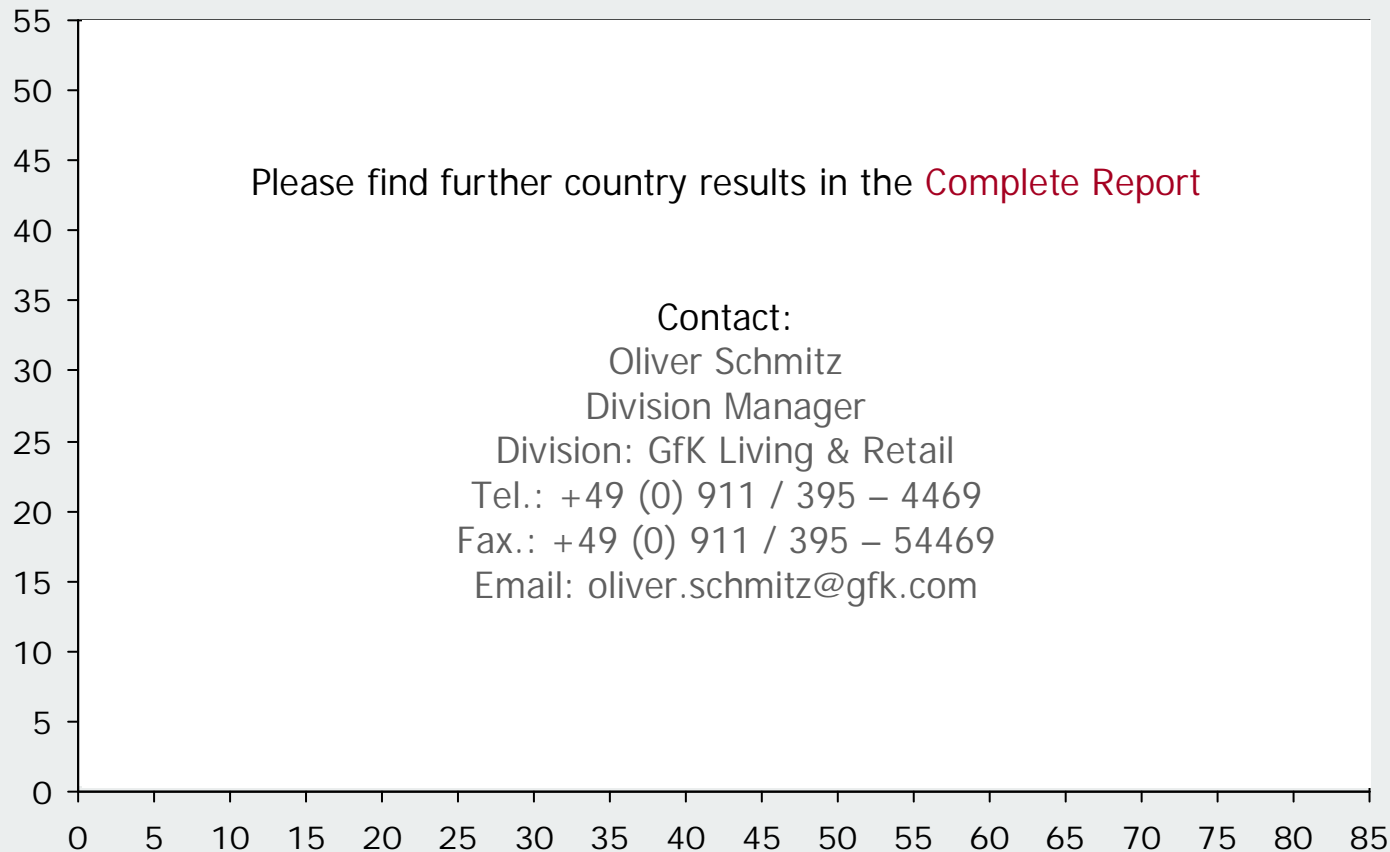
Q9a: Please mark a check next to all the stores that are near to you (within 20 minutes by car) (in %)

Q9e: Regardless of which area, which provider do you prefer? (in %)

Belgium



Q9e: Preferred provider



Q9a: „Is close to me“

Please find further country results in the **Complete Report**



Q9a: Please mark a check next to all the stores that are near to you (within 20 minutes by car) (in %)  
 Q9e: Regardless of which area, which provider do you prefer? (in %)

Spain



Please find further country results in the **Complete Report**



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Q9a: Please mark a check next to all the stores that are near to you (within 20 minutes by car) (in %)

Q9e: Regardless of which area, which provider do you prefer? (in %)

Denmark



Q9e: Preferred provider



Q9a: „Is close to me“

# International fediyma DIY Consumer Study 2010 by GfK Living & Retail Your Investment



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**If any questions or the need for market research with competence in home improvement should arise, please contact:**

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