‘THE BIG SQUEEZE’ IS A MAIL METRO MEDIA RESEARCH SERIES THAT TRACKS THE ONGOING IMPACT THAT THE COST OF LIVING CRISIS IS HAVING ON CONSUMERS’ FINANCES AND BEHAVIOURS ACROSS A BROAD RANGE OF CATEGORIES.

EACH WEEK WE ASK OUR MATTERS COMMUNITY MEMBERS ABOUT THEIR BEHAVIOURS IN ONE CATEGORY TO ASCERTAIN IF AND HOW IT HAS BEEN IMPACTED BY THE COST OF LIVING CRISIS.

OUR AIM IS TO OFFER USEFUL INSIGHTS AND PRACTICAL GUIDANCE ON HOW BRANDS CAN NAVIGATE THIS DIFFICULT AND TUMULTUOUS PERIOD.

NEXT IN THE SERIES, WE ARE FOCUSING ON HOME IMPROVEMENT AND OUR READERS’ PLANS FOR THEIR HOMES OVER THE NEXT 12 MONTHS. EXAMINING HOW, IF AT ALL, THESE PLANS WILL HAVE BEEN IMPACTED BY THE COST OF LIVING CRISIS.
**METHODOLOGY**

**APPROACH:**
10 mins online survey, respondents recruited through the Matters Community

**FIELDWORK DATES:**
September 2022

**SAMPLE:**
622 respondents

Weighted to be representative of the MMM weekly audience by gender, age and socioeconomic group

Looking through the lens of cost of living crisis, this research focuses on attitudes towards DIY, home improvement plans, and views on Britain’s biggest DIY brands and the implications of this for brands and advertising.
WHAT WILL WE COVER?

1. KEY FINDINGS
2. HOME IMPROVEMENT - BEHAVIOURS AND PLANS
3. THE BIG SQUEEZE – 5 KEY HOME IMPROVEMENT TRENDS
4. BRAND PERCEPTIONS
5. IMPLICATIONS
6. APPENDIX
DIY BEHAVIOURS

• Over 1 in 2 readers are confident in their DIY skills - this increases to 62% amongst males (vs. females 45%).

• 45% of our readers are proud of their homes - this falls significantly for renters (33% vs. home owners 51%).

• 3 in 5 undertook a DIY project in the last 6 months and 1 in 3 used a tradesperson - 1 in 4 found it difficult to find the right tradesperson and 54% said that hiring them was more expensive than expected.

DIY PLANS

• 7 in 10 plan to undertake a home improvement project in the next 6 months.

• 1 in 2 will be painting or decorating, 2 in 5 plan to improve their gardens, and 3 in 10 plan to buy new furniture - living room furniture is most in demand.
5 KEY HOME IMPROVEMENT TRENDS

1. **Home improvements on hold** – 3 in 10 readers have put home improvement plans on hold due to the cost-of-living crisis.

2. **Scaling back / Spending less** – 1 in 2 have / plan to scale down / spend less on home improvement projects.

3. **Rise of the savvy shopper** – 7 in 10 are increasingly shopping around for the best deals. 1 in 3 are having to compromise on quality.

4. **The Great British ‘Make’ Off** – The pressures on incomes has led to an increase in upcycling and the willingness for readers to try doing a project using their own skills.

5. **Insulation Nation** – 2 in 5 have made / plan to make improvements to the insulation in their homes in the next 6 months.
HOME IMPROVEMENT - BEHAVIOURS AND PLANS
HALF OF OUR READERS ARE CONFIDENT IN THEIR DIY SKILLS

Just less than half (45%) say they are proud of their homes

Q: When it comes to DIY / home improvement how confident are you? (very confident / quite confident)
Q: Which, if any, of the following statements about DIY and home improvement do you agree with?

Over 1 in 2 (53%) of readers are confident in their DIY skills
Men (62%) are more confident than women (45%)

45% of readers agree ‘I am proud of my home’
Home owners (51%) are prouder than renters (33%)

45% of readers agree ‘I am always doing little jobs at home’
Adults aged 55+ (49%) are more likely to do little jobs at home
3 IN 5 HAVE IMPROVED THEIR HOMES IN THE LAST 6 MONTHS – HIRING A TRADESPERSON WAS MORE EXPENSIVE THAN EXPECTED FOR HALF OF READERS

Q: Have you done any DIY or home improvement projects in the last 6 months? / Q: Have you hired a tradesman to undertake any DIY work in the last 6 months? / Q: Was it more or less expensive than expected?

3 in 5 (57%) of readers have undertaken a DIY or home project in the last 6 months

1 in 3 readers hired a tradesperson to undertake the work

55% found it easy to find a suitable tradesperson
24% found it difficult. Adults aged 55+ found it most difficult (30%)

54% said hiring the tradesperson was more expensive than they expected
41% said it cost what they expected

Source: DIY & Home – The Big Squeeze September 2022
Base: 622 respondents
7 IN 10 PLAN HOME IMPROVEMENTS IN THE NEXT 6 MONTHS

Painting (46%) is the most popular improvement – 2 in 5 plan to improve their garden and 3 in 10 plan to buy new furniture.

Q: Please state your level of agreement or disagreement with each of the following statements. Thinking generally about your attitude to researching and selecting products and services for DIY and home improvement, how may or may not they have changed recently?

68% Plan to undertake a home improvement project in the next year.

Home improvement plans for next 6 months:
- Decorating my home (e.g., painting): 46%
- Buying new soft furnishings: 41%
- Improving my garden: 38%
- Buying accessories (e.g., prints, ornaments): 33%
- Buying new furniture: 31%
- Buying new garden furniture: 19%
- Improving the insulation in my home: 18%
- Renovating/ extending an area of my home: 16%
- Updating bathroom: 15%
- Updating kitchen: 14%

Source: DIY & Home – The Big Squeeze
September 2022
Base: 622 respondents
THE BIG SQUEEZE – 5 KEY HOME IMPROVEMENT TRENDS
HOME IMPROVEMENTS ON HOLD

As the cost of living crisis continues to squeeze disposable incomes, many readers are delaying or completely cancelling their home projects altogether.

Q: How, if at all, have your DIY plans / home improvement plans changed as a result of the cost of living crisis?

3 in 10 have put home improvement plans on hold due to the cost of living crisis.

- “Have postponed plans to renovate bathrooms. Only carrying out essential repairs and maintenance.”
- “Putting projects on ice because of energy and food bills.”
- “At least 3 projects have been put on hold indefinitely because of the cost of living crisis.”
- “Delayed doing up the living room and purchase of new sofa.”
- “We have put any major plans on hold because to be honest at the moment we just need to make sure we have enough money to survive.”
- “Put plans on hold due to cost and can’t find anyone to do it.”
Of those still planning projects, some plan to reduce the budget or scale of their home improvement projects so that they can still go through with them.

Q: How, if at all, have your DIY plans / home improvement plans changed as a result of the cost of living crisis?

1 IN 2

- “I have had to cut back on what I want to do and how soon I do more long-term projects now.”
- “Reined it in a bit, will be doing it on a tighter budget.”
- “Smaller amounts of home improvement at one time.”
- “Doing less, thinking more about whether I actually need to buy something or if I can live without it.”
- “Will reduce spend and do jobs myself rather than spend on contractors.”
- “I have scaled back my home improvement plans.”
RISE OF THE SAVVY SHOPPER
Many are increasingly shopping around for the best deals which may have an impact on retailer loyalty - others are compromising on quality

Q: How, if at all, have your DIY plans / home improvement plans changed as a result of the cost of living crisis?

- 71% I am increasingly shopping around for the best deals
- 32% I am having to compromise on the quality of the products I buy

"Shopping around for cheaper products and using more budget friendly companies."

"I'm just looking around more to get things at lower prices."

"I'm checking all the time if there is some discounts or promotions for the things I want."

"Looking online, shopping around more and working out what if any are the best deal."

"I am having to buy lower quality products / paints. Improvements are taking longer as I have to save up to purchase any products and / or paints."

"I shop around more than before as prices have risen quite dramatically."

Source: DIY & Home – The Big Squeeze September 2022
Base: 622 respondents
Q: How, if at all, have your DIY plans / home improvement plans changed as a result of the cost of living crisis?

- "We are more likely to attempt things ourselves / upcycle furniture, than pay a tradesperson or buy new."
- "More careful how much I spend and am more likely to purchase 'preloved'."
- "Planning to do more by myself rather than hiring a tradesman."
- "I will do as much myself as I can before hiring anyone."
- "Some will be done by ourselves rather than employ a tradesman, on improvements we have the skills to do ourselves."
- "Made me a lot wiser and more enthusiastic about DIY."

+277% in online interest around "furniture upcycling near me" in the UK between February 2022 and June 2022

1 in 4 say a lack of tools prevents them from doing more DIY

INSULATION NATION
To combat the increased price of fuel and energy, many are looking at improvements that improve the thermal efficiency of their homes

Q: Have you taken any steps to reduce your energy consumption over the last 6 months? / Q: What steps have you taken to reduce your energy consumption?

“I have encouraged my sons, who have their own homes, to insulate their loft space and fit double glazing.”

“I am concentrating more on insulation and energy efficiency.”

“Made sure that the house is as thermally efficient as possible.”

Have taken steps to reduce energy consumption 72%

“Hope to get the insulation improved sooner rather than later.”

“Looking at upgrading heating thermostats.”

Made / plan to make improvements to glazing / insulation 38%

“I am planning to have an efficiency test done on the house this autumn.”

Source: DIY & Home – The Big Squeeze September 2022 Base: 622 respondents
HOME IMPROVEMENT - BRAND PERCEPTIONS
QUALITY STILL MATTERS FOR CONSUMERS BUT INCREASED SAVVINESS MIGHT LEAD TO MORE BRAND PROMISCUITY

Only 6% strongly agree that they tend to shop with / buy from the same providers they always use.

Q - Thinking generally about your attitude to researching and selecting products and services for DIY and home improvement, how may or may not have they changed recently? Please state your level of agreement or disagreement with each of the following statements.

- 75% agree: When it comes to home improvement products you tend to get what you pay for (strongly agree 21%)
- 47% agree: I tend to shop with / buy from the same providers I always use (strongly agree 6%)

Source: DIY & Home – The Big Squeeze
September 2022
Base: 622 respondents
B&Q leads the market on providing an ‘affordable range’ and ‘additional offers’

Wilko and Home Bargains lead on ‘helping to keep prices as low as possible’

Q: To what extent do you agree or disagree with the following phrases when thinking about (DIY retailer)?

- **Have a wide range of affordable and accessible DIY products**
  - Homebase: 45%
  - B&Q: 57%
  - Wickes: 54%
  - Screwfix: 54%
  - Wilko: 58%
  - Home Bargains: 71%

- **Is focused on keeping prices as low as possible for consumers**
  - Homebase: 40%
  - B&Q: 34%
  - Wickes: 37%
  - Screwfix: 40%
  - Wilko: 51%
  - Home Bargains: 52%

- **Is looking to help customers through additional offers**
  - Homebase: 33%
  - B&Q: 42%
  - Wickes: 31%
  - Screwfix: 28%
  - Wilko: 39%
  - Home Bargains: 36%

- **Stocks good quality products**
  - Homebase: 52%
  - B&Q: 53%
  - Wickes: 52%
  - Screwfix: 60%
  - Wilko: 64%
  - Home Bargains: 45%
DFS LEADS THE MARKET ON PROVIDING AN ‘AFFORDABLE RANGE’ AND ‘ADDITIONAL OFFERS’

John Lewis is a close second but scores significantly higher on quality

<table>
<thead>
<tr>
<th>Q: We are now going to ask about your perceptions of a furniture retailer. To what extent do you agree or disagree with the following phrases when thinking about [Furniture Retailer]?</th>
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<tbody>
<tr>
<td>Have a wide range of affordable furniture</td>
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<tr>
<td>36%</td>
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<tr>
<td>28%</td>
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<tr>
<td>25%</td>
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<td>38%</td>
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<td>46%</td>
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John Lewis
Wayfair
Furniture Village
Dunelm
DFS
IMPLICATIONS
IMPLICATIONS FOR ADVERTISERS

THEMES THAT MATTER

HOME IMPROVEMENTS

7 in 10 readers plan to make improvements to their homes or gardens in the next 6 months.

DELAYING OR SCALING DOWN

3 in 10 readers have had to delay a home improvement project, 1 in 2 are having to spend or do less than originally planned.

SAVVY SHOPPING

71% of readers are increasingly shopping around for the best deals. 1 in 3 have had to compromise on quality of products.

FIRST HAND, SECOND HAND

+277% increase in searches for ‘furniture upcycling near me’ from February – July 2022.

INSULATION NATION

2 in 5 readers plan to make improvements to the insulation of their homes in the 6 months. 7 in 10 have already made their homes more energy efficient.

PROJECTS FOR ALL BUDGETS

Home improvement plans are being put at risk from the rising cost of living.

Showcase how your range of products and services can be tailored to meet the requirements / budgets of all DIYers, not just the more affluent ones.

REWARD LOYALTY, TEMPT NEW USERS

More consumers are shopping around for the best deals and only 6% of consumers always buy from the same suppliers.

Showcase loyalty schemes that reward repeat purchase and entice new consumers with offers.

ENCOURAGE CRAFT AND CREATIVITY

There is an increased interest in upcycling projects and getting more hands on with DIY as budgets are squeezed

Encourage people to have a go and provide resources for them on how to improve their skills.

USE NEWSBRANDS

Newsbrands are key sources or information and inspiration for DIY projects.

Mail Metro Media has a track record of delivering successful campaigns for home improvement retailers across our print and digital portfolio.
**USE MAIL METRO MEDIA AND WATCH YOUR CAMPAIGN TAKE OFF**

<table>
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<tr>
<th>POWER OF MAIL METRO MEDIA</th>
<th>REACHING ALL AUDIENCES</th>
<th>HISTORY OF SUCCESS</th>
<th>MAIL METRO MEDIA DATA SEGMENTS</th>
</tr>
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<tr>
<td><strong>69%</strong></td>
<td><strong>22M</strong> Homemakers reached by our brands monthly (67% reach)</td>
<td><strong>+34%</strong> average in consideration of brands featured in partnerships with our titles.</td>
<td><strong>DIY ENTHUSIASTS</strong> 0.3M</td>
</tr>
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<td>of all expenditure on DIY and home improvements last year was spent by our readers (£10.8bn)</td>
<td><strong>1.3M</strong> Adults looking to move home in the next 12 months (70% reach)</td>
<td><strong>+95%</strong> average increase in purchase intent on our DIY campaigns</td>
<td><strong>GARDEN</strong> 0.2M</td>
</tr>
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<td><strong>2.0M</strong> of our readers plan to make major home improvements in the next 12 months (69% reach)</td>
<td><strong>15.6M</strong> Adults who are always looking for ideas to improve their home (66% reach)</td>
<td><strong>40%</strong> average call to action score for DIY category</td>
<td><strong>HOME IMPROVEMENT</strong> 1.0M</td>
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Source: TGI October 2022
APPENDIX
LIVING ROOM FURNITURE IS MOST IN DEMAND – FOLLOWED BY BEDROOM FURNITURE

Q: You said that you are looking to buy new furniture for your home. Which, if any, of the following are you looking to purchase in the next 6 months?

Furniture under consideration

- Sofa: 30%
- Other living room: 30%
- Bedroom furniture: 24%
- Mattress: 23%
- Dining room furniture: 17%

Source: DIY & Home – The Big Squeeze
September 2022
Base: 622 respondents
ONLY 1 IN 4 WOULD BE PREPARED TO PAY MORE FOR EARLY DELIVERY – OVER 2 IN 5 ARE NOT PREPARED TO PAY MORE FOR ETHICALLY PRODUCED FURNITURE

Q - Thinking generally about your attitude to researching and selecting products and services for DIY and home improvement, how may or may not they have changed recently? Please state your level of agreement or disagreement with each of the following statements.

- **24%** agree
  When buying furniture I would be prepared to pay extra to get my purchases earlier (any disagree 46%)

- **44%** agree
  I am not prepared to pay extra for ethically produced furniture (any disagree 26%)

- **33%** agree
  It is important that my furniture is ethnically produced (any disagree 28%)

Source: DIY & Home – The Big Squeeze
September 2022
Base: 622 respondents