

# EUROPEAN HOME REPORT 2012



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The research revealed four key themes about how consumers across Europe are using their homes and about their attitudes to home improvement.



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People across Europe enjoy improving their homes and prioritise spending money on them to improve their quality of life.



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Nine out of 10 Europeans are spending money improving their homes, with nearly three quarters doing the jobs themselves.



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The internet is used extensively in home improvement, especially for research, price comparisons and advice.



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### ECO IS GOING MAINSTREAM

Making the home eco-friendly is important to consumers across Europe, but is more pronounced in the developing economies.

## COUNTRY BY COUNTRY

The key research findings for each country, together with macro-economic data for each of the eight markets.



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Kingfisher plc is Europe's largest home improvement retail group and the third largest in the world, with over 1,000 stores in eight countries in Europe and Asia. Its main retail brands are B&Q, Castorama, Brico Dépôt and Screwfix. Kingfisher also has a 50% joint venture business in Turkey with Koç Group, and a 21% interest in, and strategic alliance with Hornbach, Germany's leading large format DIY retailer.

# INTRODUCTION

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**Ian Cheshire**  
Group Chief Executive, Kingfisher plc

This report provides a unique snapshot of the way Europeans view their homes and their attitudes to home improvement. We surveyed over 15,000 people across eight countries in Europe and what is clear is that the home is one of the most important elements in people's lives.

Home really is where the heart is. Householders are doing more home improvement and spending more on their homes. And they are doing so not just to increase the value of the property, but simply to have a nicer place to live. It's about making a house into a proper home.

People are also adapting their homes to changing lifestyles, using the internet for their home improvement projects and being more sustainable, with the main motivation being to save money. They are creating better homes in order to enjoy a better quality of life.

Kingfisher is Europe's largest home improvement retailer with over 1,000 stores in eight countries, and as part of our 'Creating the Leader' strategy we want to ensure that we know more about the European home than anyone else. This report is part of that, and we have concentrated on the countries in which we trade, namely the UK & Ireland, France, Poland, Russia, Turkey, Spain and Germany.

The findings confirmed some of our long-held views and surprised us in other areas. We hope you find the report equally thought-provoking.

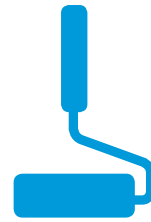
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# SUMMARY OF FINDINGS

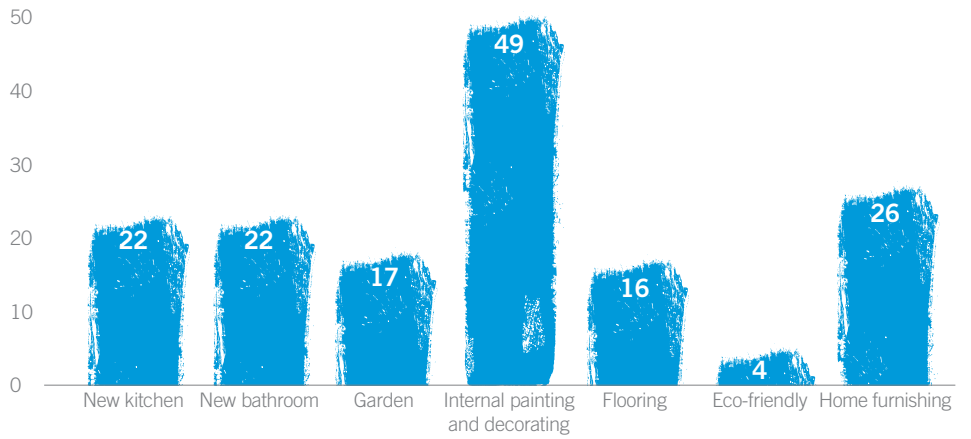
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64% of consumers plan to spend at least as much on their home next year as last

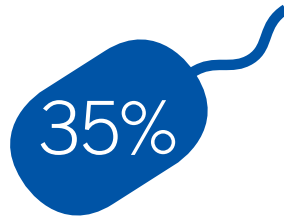
- Consumers across Europe regard home improvement as a top priority with 9 out of 10 householders saying they undertake some sort of work on their home whether it be painting a room or installing a bathroom.
- Home improvement ranks ahead of holidays (75% vs 59%), among consumers who were asked what they are most likely to spend money on over the next 12 months.
- Nearly two thirds of respondents plan to spend at least as much on their home next year as last.
- The French were the home improvement champions of Europe last year, spending 1.2 times the European average. The UK and Ireland spent 0.9 times the European average.
- The main reason for undertaking home improvement is to have a nicer place to live (52% do so to refresh the home and 48% for a more comfortable home). This compares with doing home improvement to increase the value of the property, which comes fifth on the list of priorities, with houses being regarded more as a home to enjoy living in rather than a financial instrument to be used for profit.
- More than half (52%) of householders plan to live in their home for at least 10 years, perhaps another sign of the 'improve, don't move' trend.
- Throughout the countries surveyed, householders are adapting their homes for children living with the family longer or to accommodate elderly relatives (27%). They are also responding to changes in technology to make it easier to work from home as well as altering the areas they use for entertaining (23% and 39% respectively).
- Internal painting and decorating is the most commonly undertaken job in the home, followed by renewing home furnishings and fitting a new kitchen or bathroom.
- The internet is used extensively when undertaking home improvement jobs, but mainly for undertaking research, comparing prices and seeking advice, rather than making purchases. Overall, 35% of respondents say they buy home improvement products online, with the Germans being the most likely to do so (48%) and the French the least (21%).
- Television programmes and browsing in home improvement stores are the main sources of ideas and inspiration.
- Throughout Europe, a third of home improvers do some home improvement at least once a month, if not on a weekly basis.
- Home improvement skills and confidence levels vary significantly from country to country. The Germans are the most confident, whereas in Turkey they are the least confident at doing DIY without a tradesman.
- The desire to be eco-friendly is an increasingly important factor in choosing projects, with 32% saying that living in an eco-friendly home is "very important" to them. Home improvers in emerging countries are especially concerned. Energy efficiency products are the most popular eco-investments, showing perhaps that going green is as much about saving money through lower energy bills as it is about saving the planet.



In the next 12 months I am planning the following home improvements (%)



39% are adapting the home for entertainment purposes



Buy home improvement products online



The United Kingdom and Ireland are the keenest gardeners



Plan to live in their homes for 10 years



France spends the most on home improvement



Germany buys the most home improvement products online

# HOME IS WHERE THE HEART IS

Homeowners right across Europe enjoy improving their homes. They prioritise spending money on them and are doing so to improve the quality of their lives at home, rather than to increase the value of the property. In short, in an age of economic uncertainty, the research shows that home really is where the heart is.

## 9 out of 10

Europeans undertake some form of home improvement

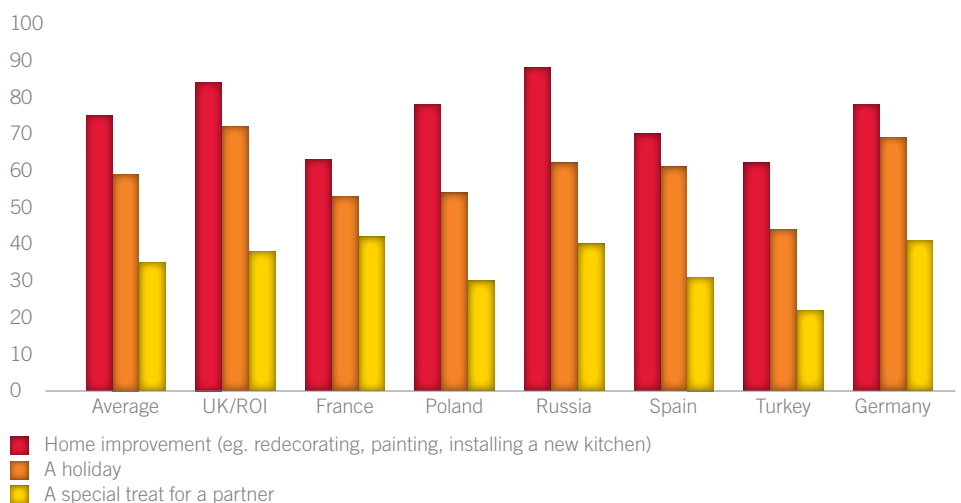
Nine out of 10 Europeans undertake some form of home improvement – whether it is simply applying a fresh coat of paint or building an extension. While most (58%) only tackle limited tasks, a quarter are so enthusiastic about home improvement that they refer to it as a hobby.

The French were the highest spenders on home improvement projects in the past 12 months, with an average spend of 1.2 times the European average. The UK and Ireland, Poland and Turkey spent 0.9 times the European average.

When asked about their future spending plans over the next twelve months, 75% of consumers said they plan to spend their money on improving their homes, a higher proportion than planning holidays or special treats for their partners (see chart 1).

Nearly two-thirds of consumers plan to spend at least as much on their homes next year as they did this year, with the Russians leading the way (76%) (see chart 2).

**Chart 1. What are you most likely to spend money on in the next 12 months? (%)**

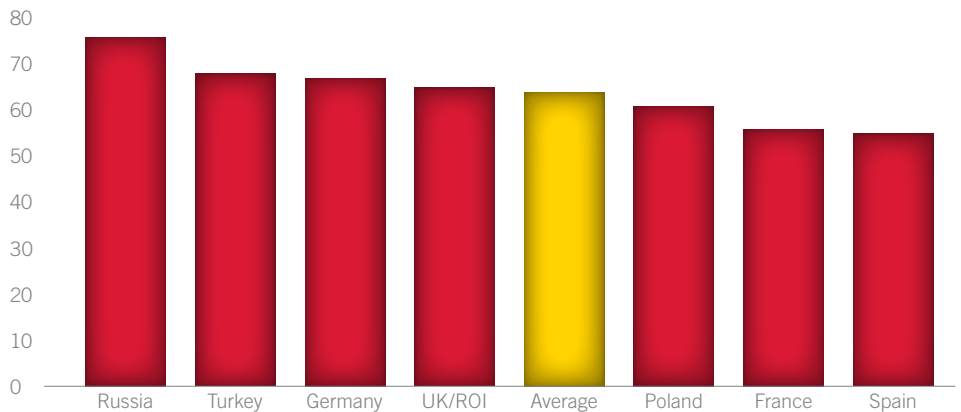


# 64%

Nearly two-thirds of consumers plan to spend at least as much on their homes next year as they did this year

The living room is the room people are most proud of, followed by the kitchen

**Chart 2. I plan to spend more or the same on home improvement next year compared to last year (%)**



This trend is being driven by householders' desire to improve their quality and enjoyment of life at home.

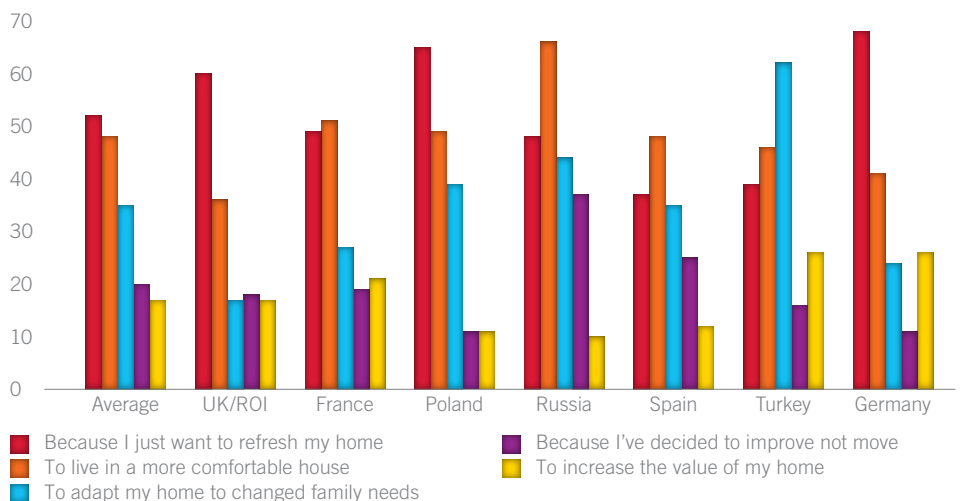
When asked why they undertake home improvement, householders were most keen on simply refreshing their home (52%), suggesting they are doing it as a way to benefit from a change to their home environment without actually moving house (see chart 3).

The second most popular reason was to live in a more comfortable house (48%), which

was the highest priority for the French and the Russians in particular. Adapting the home for changing family circumstances is also high on the list, as this report will discuss on page 6.

Increasing the value of the home comes only fifth in a list of reasons to carry out home improvement. This may reflect the economic environment with people increasingly viewing their house as a home, rather than a financial asset to be sold for a profit.

**Chart 3. The main reasons I will undertake home improvement work in the next 12 months are... (%)**



The 'improve, don't move' trend is further reinforced by the fact that more than half (52%) of homeowners plan to live in their homes for at least 10 years.

When asked about which rooms they felt most proud of, the consumers surveyed said that they are most proud of their living

rooms, followed by the kitchen, the bedroom and bathroom. This pattern was common across most countries and age groups apart from those aged between 18 and 25, who are generally happier with their bedrooms, and Polish consumers who are proudest of their kitchens.



# 52%

of householders plan to live in their homes for at least 10 years

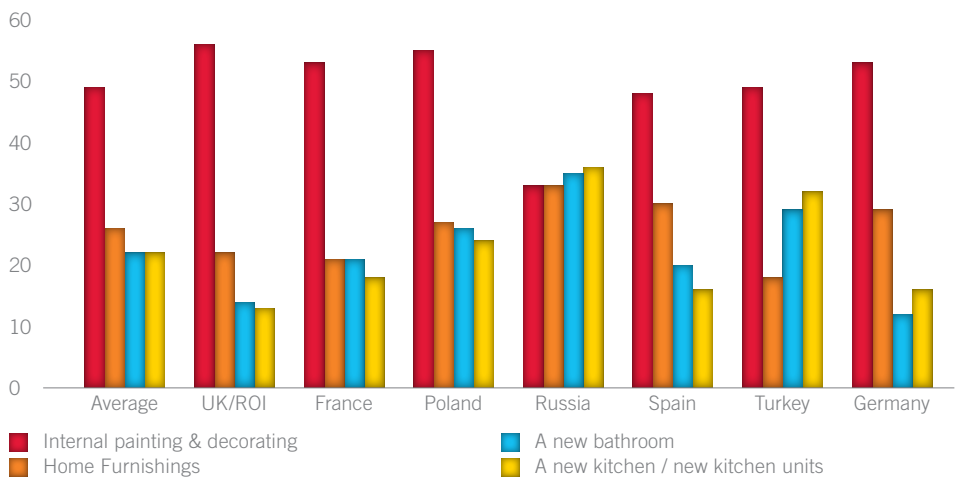
## Home improvement activities

Consumers across most of Europe list their top home improvement activity as internal painting and decorating. Other favourites include renewing home furnishings, followed by upgrading a kitchen or bathroom, which are the two most popular options in Russia at 36% and 35% respectively (see chart 4).

There are other national differences. Householders in the UK and Ireland and in Germany are much more likely than their counterparts elsewhere to improve their gardens, while in Turkey, home security and lighting are of greater importance.

Enthusiasm for growing vegetables is also evident and is strongest in those countries where gardening is especially popular, notably the UK and Ireland (26%) and Germany (24%).

**Chart 4. Which home improvements do you plan to make in the next 12 months? (%)**

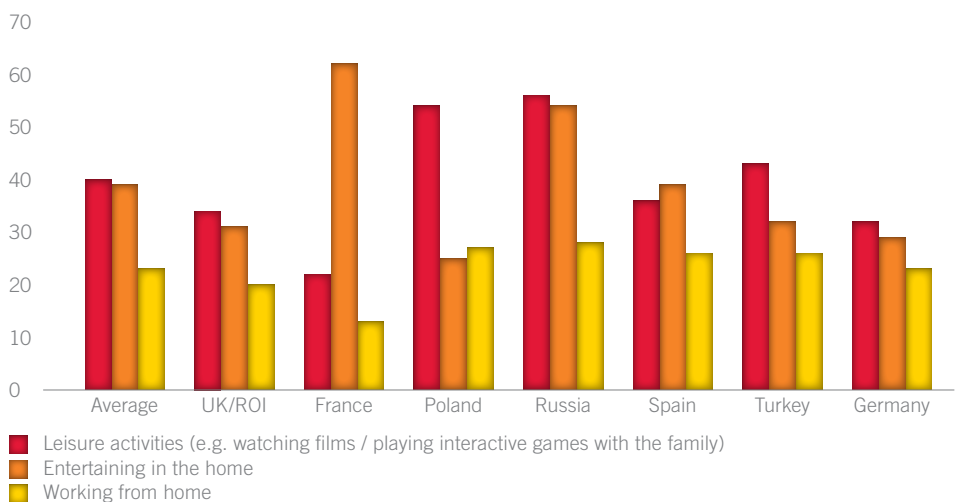


## Adapting the home

The home is becoming an ever more important hub for all of life's activities. Consumers across the continent are putting more emphasis on time spent at home as lifestyles and working patterns change, and are adapting their accommodation to allow

more leisure activities, entertaining and also working from home (see chart 5). Also important in the last five years was adapting the home to enable more family members to live in it, for example elderly relatives (13%), and children living at home for longer (14%).

**Chart 5. Over the past five years I have adapted my home for... (%)**





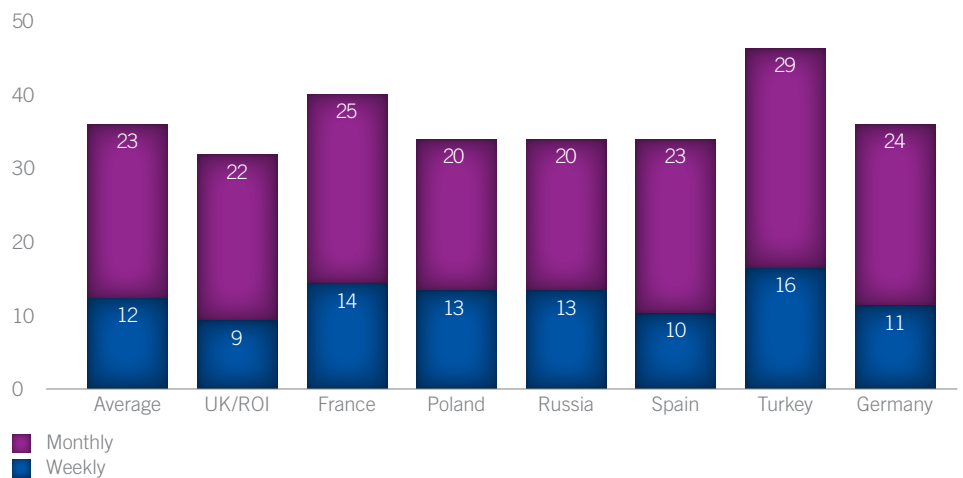
# EVERYBODY'S DOING IT



Nine out of 10 Europeans are spending money improving their homes, with nearly three quarters doing the jobs themselves. About a third of consumers undertake Do-It-Yourself tasks at least once a month, with one in 10 of these falling into the category of “weekend warriors” who carry out jobs in their homes on a weekly basis (see chart 10).

Consumers in the UK and Ireland are the keenest gardeners

**Chart 10. How often do you or someone in your household undertake DIY projects? (%)**



The Germans are the most capable DIYers

There are sharp variations in the jobs that people from different countries are prepared to do for themselves, rather than use a tradesman. Consumers in the UK and Ireland are keen gardeners (81%). They are also much more likely than their counterparts in other countries to take on landscaping and other larger garden projects (34% vs the average of 16%). On the other hand, Russian and German

consumers are much more inclined than others to undertake structural alterations (both 21%). The Germans are the most capable DIYers, willing to take on anything from painting and decorating, through to electrical jobs, plumbing and major installations. In the UK and Ireland, France and Germany there is a greater than average willingness to do flooring and tiling jobs (see chart 11).

29%

said in-store demonstrations would help them do more ambitious DIY projects

**Chart 11. What types of jobs do you feel happy doing yourself, without the need for a tradesman? (%)**

	Average	UK/ROI	Turkey	Russia	Poland	France	Spain	Germany
Painting and decorating projects	63	82	44	53	71	58	53	80
Small ad-hoc repairs to my home	58	66	40	58	64	55	49	79
Gardening	52	81	37	37	52	52	35	69
Installing new bedroom furniture	39	37	24	40	40	44	31	57
Flooring projects	24	35	7	17	25	32	10	43
Electrical projects	23	21	17	27	26	19	23	29
Tiling projects	19	38	4	17	19	23	7	28
Installing a new kitchen	19	19	16	22	20	20	10	26
Plumbing projects	17	22	7	16	21	14	12	25
Landscaping/larger garden projects	16	34	10	16	16	14	4	21
Installing a new bathroom	15	15	11	14	17	19	9	18
Structural alterations to my home	13	6	12	21	17	8	6	21
Installing insulation	10	22	2	8	7	14	3	16

#### Key

**Green** – the country most happy to undertake this job, without the need for a tradesman

**Red** – the country least happy to undertake this job, without the need for a tradesman

Gender stereotypes about what is and isn't considered "a man's job" persist in the UK and Ireland, France, Spain and Poland, but the gap between the two is narrower in Germany. In Spain and Turkey, while confidence is generally quite low, women are just as likely as men to do DIY projects. An index of DIY confidence across all geographies shows that those living in rural areas (113) saw themselves to be more skilled around the house than those in towns and cities (97).

#### Help and advice

Although many people said they would not take on more complex jobs such as plumbing and electrical work, there are signs that they could be encouraged to do more for themselves if helped. The research indicates that in-store demonstrations (29%) and online video assistance (27%) would be most likely to help consumers do more ambitious home improvement projects. Access to helpful and knowledgeable staff in stores is also seen as important (23%), while a significant proportion (18%) said tool hire would help make certain infrequent jobs more attractive. In France nearly 20% of respondents said that tool sharing would encourage them to do more DIY jobs.

# THE INTERNET: PART OF THE TOOLKIT



The internet is used extensively when undertaking home improvement jobs, but mainly for research, comparing prices and seeking advice, rather than making purchases.

Two-thirds of home improvers use the internet to research products and make price comparisons and half of them use it to find information about how to improve the home.

## 66%

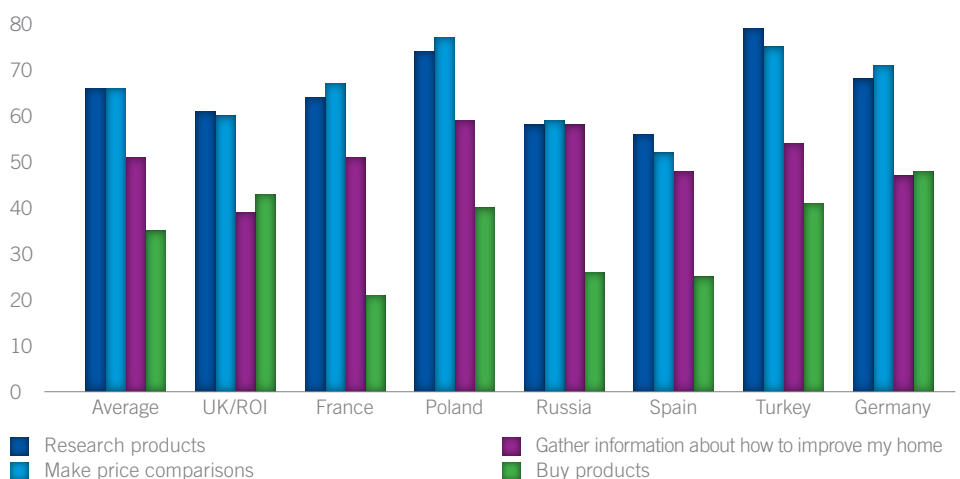
of home improvers use the internet for research and price comparisons

Over a third of consumers (35%) buy home improvement products online, while more than a quarter (27%), of home improvers go online simply to locate their nearest store. Just under a quarter (23%) use it to watch instructional videos via channels such as YouTube.

When planning for home improvement and DIY projects in general, internet usage varies considerably across Europe. An index of internet usage for home improvement

shows it is greatest in Poland and Turkey (both 112), two countries with rapidly developing economies, where internet usage has increased quickly in recent years<sup>(1)</sup>. However, the Germans – followed by consumers in the UK and Ireland – are the most likely to actually buy products over the internet (48% and 43% respectively). The French (21%), Russians (26%) and Spanish (25%) are the least likely to do so (see chart 6).

**Chart 6. How do you use the internet when considering a home improvement project? (%)**



(1) Internet world stats, Poland internet usage stats and market report  
Internet world stats, Turkey internet usage stats and market report

# 39%

of consumers browse  
in DIY stores for home  
improvement inspiration

'Click and collect' is an important channel in the UK and Ireland, with almost a third of consumers ordering items online and then picking them up from a store. Consumers in the UK and Ireland are also more than twice as likely to use 'click and collect' services than the European average. Fewer than one in 10 do so in Turkey, France, Spain and Germany. However, 'click and collect' shopping is becoming more popular and more available in countries like France and Germany<sup>(ii)</sup> for example.

In general, more men use the internet for home improvement purposes than women. And whilst more men than women buy home improvement products online, women are more likely than men to go online to locate their local store or to find information about how to improve their homes.

### Home improvement inspiration and influences

When it comes to finding inspiration for home improvement projects, television shows on home improvement (41%) and browsing in DIY stores (39%) are most popular. Over a third of people cite the internet as their main source of ideas (see chart 7).

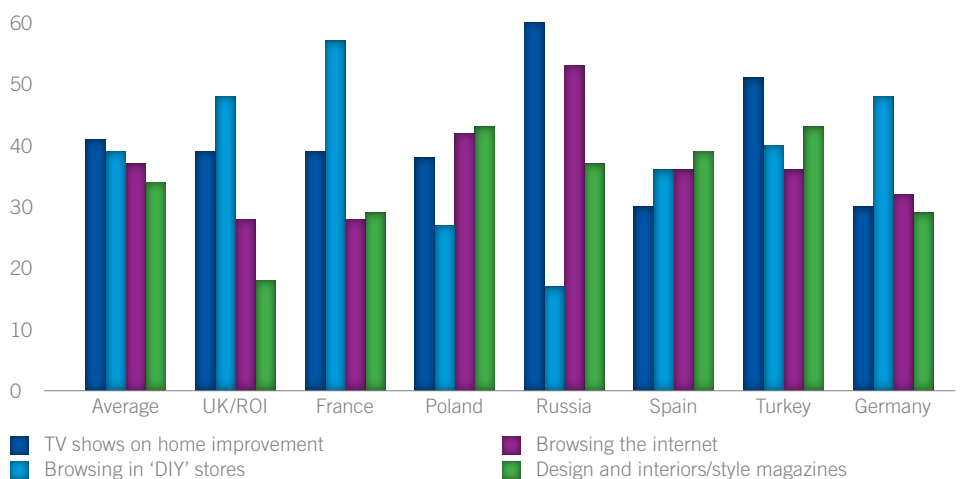
Turkish and Russian home improvers have the widest sets of influences, with browsing the internet particularly popular in Russia (53%). In addition, both Russian and Turkish consumers are more likely to be inspired by television shows on home improvement (60% and 51% respectively) than is the case elsewhere. Such TV shows are least inspirational in Spain and Germany (both 30%). Polish and Turkish home improvers are top of the list for being inspired by design and interior style magazines (both 43%).

North-west Europeans appear to use the most traditional sources for ideas, with home improvers in France, the UK and Ireland and Germany most likely to get their ideas from browsing product ranges in DIY stores.

While still at a low level, decorating blogs are a growing source of inspiration. They are on a par in terms of popularity with neighbours' homes and general magazines (5% each), but are more popular in Russia, Turkey and Spain.

Other sources of inspiration include ideas from other countries and advice from family members and friends.

Chart 7. My main sources of home improvement inspiration are... (%)



(ii) Aldata, *Click and collect poised to capture future supermarket trend*, July 2012

# ECO IS GOING MAINSTREAM



Making homes eco-friendly is an increasingly important factor for consumers across Europe, with 32% saying it is “very important” to them. A further 48% say it is “fairly important”, with the most popular eco-investments being energy-efficient installations. While the issue is firmly on the agenda across Europe, interest appears greatest in rapidly developing countries.

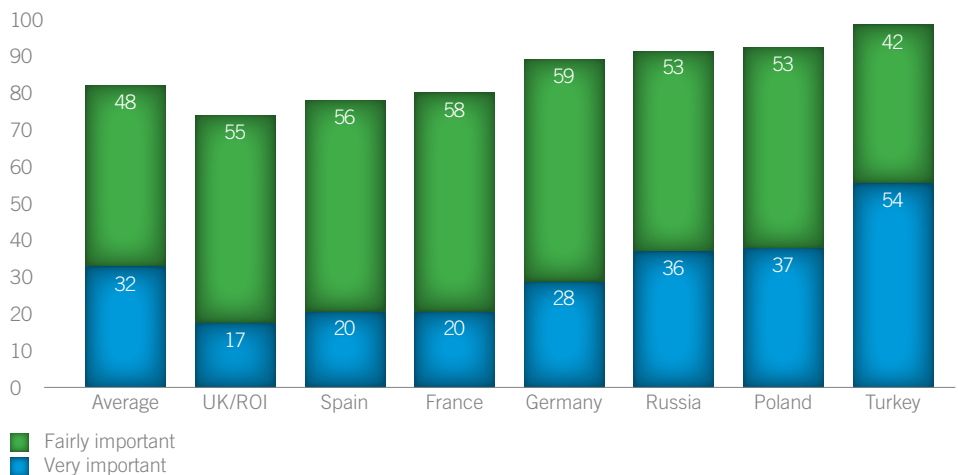
## 80%

say it is either “fairly important” or “very important” to them to live in an eco-friendly house

More than half (54%) of consumers in Turkey say that living in an eco-friendly home is very important, as well as more than a third in Poland (37%) and Russia (36%). The highest importance put upon

living in an eco-friendly home in more mature economies is in Germany, where 28% of consumers find eco-friendliness in the home very important (see chart 8).

**Chart 8. How important for you is living in an eco-friendly home? (%)**



42%

say renewable electricity is  
the best eco-investment

54%

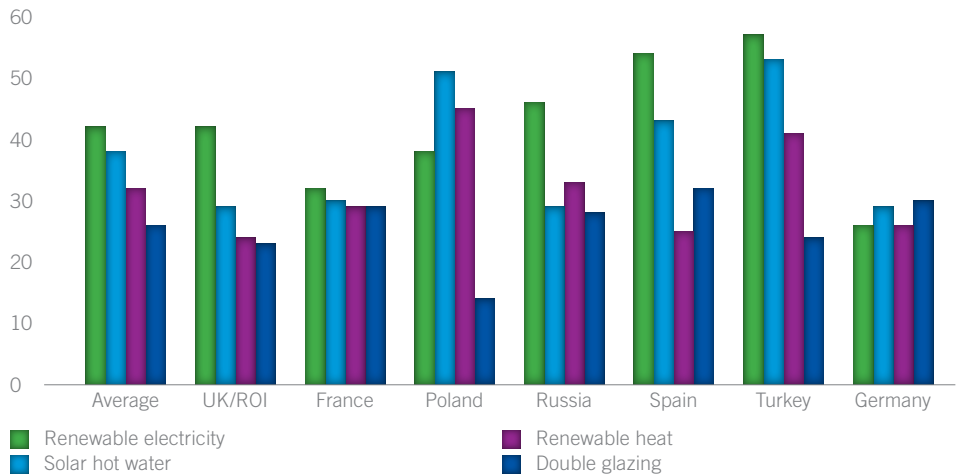
of consumers in Turkey say  
living in an eco-friendly home  
is "very important"

### Saving money vs saving the planet

When asked to identify the best eco-investments for their homes energy efficient products were the most popular, suggesting that the motivation to save money through lower energy bills is as important as saving the planet, if not more so.

Renewable electricity (42%), solar hot water (38%), and renewable heat from ground source pumps (32%) were identified as the most popular eco-investments among consumers across Europe (see chart 9). Insulation of various kinds (loft, cavity wall, double glazing), were also popular.

**Chart 9. Which do you think would be the best eco-investments for your home? (%)**



Turkish and Spanish consumers are the most interested in renewable electricity (57% and 54% respectively), with Poland and Turkey the most enthusiastic about renewable heat (45% and 41% respectively). Consumers in the UK and Ireland are particularly keen on more efficient boilers, while those in France and Germany are top for loft insulation. When conserving water, French consumers are the keenest on water butts, while those in Germany and Poland are the most likely to opt for low-flush toilets.

Re-usable products and their association with reducing waste also ranked highly and in Germany and in Poland reusability is seen to be just as important as energy-

efficiency. Products with eco-labels were the next highest on shopping lists after reusable products.

Enthusiasm for making homes eco-friendly is consistent among urban and rural dwellers and between men and women. However, different countries show different patterns of enthusiasm depending on consumers' ages. In Germany, Poland and Turkey, for instance, interest in eco initiatives for the home increases with age. In Spain, it is consistent across age groups, while in Russia and in France it peaks in middle age. In the UK and Ireland young people are more interested than older generations.

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# COUNTRY BY COUNTRY

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The research highlights for each country are included in the following pages, accompanied by some of the macro-economic indicators for these markets.





# UNITED KINGDOM AND IRELAND



## FAB FACTS

Since April 2008 3.8 million lofts, 2.0 million cavity walls and 58,000 solid walls have been insulated in the UK.<sup>(i)</sup>

34.1% of households in the UK have only one occupant, the 11th highest single occupancy rate in the world.<sup>(ii)</sup>

The majority (66%) of young adults in Ireland (aged between 19 and 24) still live at home with one or both parents.<sup>(iii)</sup>

- 84% of householders in the UK and Ireland plan to spend money on some sort of home improvement in the next year – above the average of 75%. A similar percentage (76%) find it rewarding.
- However, the UK and Ireland had the joint lowest spend at 0.9 times the European average.
- UK and Irish householders are the keenest gardeners with 81% saying they would be happy to take on gardening jobs. The 'grow your own' trend is also well established in these countries with 26% of those surveyed saying they have started growing vegetables.
- 60% of respondents expressed an interest in making improvements simply to refresh the home (compared to an average of 52%). People in the UK and Ireland have made changes to cater for more home based entertaining (31%) and leisure activities (34%).
- More home improvers in the UK and Ireland plan to tackle internal (56%) and external (15%) painting and decorating than in any other country.
- An index of home improvement confidence shows that those in the UK and Ireland are the second most confident overall at getting down to DIY jobs themselves (129 index points), and are the kings and queens of painting and decorating without any expert help (82%).
- DIYers in the UK and Ireland are the most likely to do their own tiling (38%), and insulation (22%) projects.
- The UK and Ireland use 'click and collect' more than any other country with 29% saying they use the internet to reserve items online to pick up in store.

## Country data

Key: Blue figures – UK Green figures – Ireland



61.9m<sup>1</sup> | 4.6m<sup>1</sup>  
Total population



22%<sup>42</sup>  
of housing stock was built pre 1919



5.7%<sup>44</sup> | 6.8%<sup>53</sup>  
Average unemployment 2003-2010



27.4m<sup>1</sup> | 1.7m<sup>1</sup>  
Number of households



50%+<sup>50</sup>  
of the current housing stock was built after 1979



82%<sup>46</sup>  
of the population uses the internet



66%<sup>42</sup> | 73.7%<sup>49</sup>  
owner-occupied



1.1%<sup>43</sup> | 1.4%<sup>51</sup>  
Projected GDP growth for 2013



78%<sup>54</sup>  
of households have access to the internet



3,183<sup>1</sup> | 3,216<sup>1</sup>  
Energy consumption per head (kg oil equivalent)



3.4%<sup>44</sup> | 0.3%<sup>52</sup>  
Average inflation 2008-2011



32%<sup>1</sup> | 21%<sup>1</sup>  
of the population has a broadband subscription

# FRANCE



## FAB FACTS

Social network penetration in France has reached 50%.<sup>(IV)</sup>

34% of the population lives in a flat and 43.9% in a detached house.<sup>(V)</sup>

- The French are the home improvement champions of Europe, spending 1.2 times the European average in the past 12 months, the highest in all the countries surveyed.
- France tops the list for the biggest proportion of respondents adapting their home for more entertaining (62%).
- 66% say that if it was cheaper they would be more likely to roll up their sleeves willingly.
- The 'grow your own' trend is also evident in France with 21% growing their own vegetables and 30% of respondents saying water butts would be their preferred eco-investment.
- People in France are much more likely than their counterparts elsewhere to seek inspiration for home improvements by browsing in DIY stores (57%).
- They are less likely than other consumers to use the internet for inspiration. However, they do use the internet to make price comparisons (67%), research products (64%) and to gather information on how to improve the home (51%).

## Country data



62.6m<sup>1</sup>  
Total population



17%<sup>3</sup>  
of housing stock was built pre 1919



77%<sup>6</sup>  
of households have an internet connection



27.2m<sup>1</sup>  
Number of households



0.4%<sup>4</sup>  
Projected GDP growth for 2013



34%<sup>1</sup>  
of the population has a broadband subscription



58%<sup>2</sup>  
owner-occupied



1.63%<sup>5</sup>  
Average inflation 2008-2011



3,970<sup>1</sup>  
Energy consumption per head (kg oil equivalent)



9%<sup>5</sup>  
Average unemployment 2003-2010

# POLAND



## FAB FACTS

29.6% of Polish households have only one occupant.<sup>(vi)</sup>

Poland imports 28% of its net energy consumption.<sup>(vii)</sup>

47.8% of the population lives in a flat and 47% in a detached house.<sup>(viii)</sup>

- Leisure time at home is the focus of home improvements in Poland (54%), with the main motivator being simply to refresh the home environment (65%). These results are remarkably consistent across all age groups and for city and country dwellers alike.
- Polish people tend to be proudest of their less public rooms – the kitchen (21%), bathroom (18%) and spare bedroom (13%).
- In Poland, people are also very keen to make changes so they can work from home (27%).
- Polish respondents are confident DIY plumbers (21%), and would be willing to take on more DIY projects themselves if they were cheaper (61%), or if they could find clear instructions on how to carry out projects (34%) and if there were more in-store classes (33%).
- Polish households use the internet extensively when considering home improvement and DIY projects, with the younger generation (18-25 year olds) also very keen on watching 'how to' videos on YouTube (33%).
- Polish consumers gain home improvement inspiration from design and style magazines (43%) and are the most likely to be inspired by places they have visited (27%).
- They are committed to the environment with 90% rating eco issues as "fairly" or "very" important.

## Country data



38.0m<sup>1</sup>  
Total population



37%<sup>3</sup>  
of housing stock built between 1971 and 1990



62%<sup>19</sup>  
of the population uses the internet



14.46m<sup>1</sup>  
Number of households



2%<sup>16</sup>  
Projected GDP growth for 2013



13%<sup>1</sup>  
of the population has a broadband subscription



68.7%<sup>15</sup>  
owner-occupied



3.63%<sup>17</sup>  
Average inflation 2008-2011



2,464<sup>1</sup>  
Energy consumption per head (kg oil equivalent)



13.1%<sup>18</sup>  
Average unemployment 2003-2010

# RUSSIA



## FAB FACTS

The majority of homes are in apartment blocks (70% of the total area of housing stock).<sup>(ix)</sup>

Only 3.2% of the population are on Facebook.<sup>(x)</sup>

- Home improvement is set to remain one of the top leisure activities in Russia next year as people plan to do more (88%) and spend more (47%). Russia is the top country for adaptations of the home to accommodate other members of the family going to live with them (27%).
- Russian consumers favour more opulent “Heritage” styles of décor (37%) over the contemporary looks that tend to be adopted elsewhere. But the younger generation (18-34 year olds) (41%) have more contemporary style tastes in line with those in the rest of Europe.
- Consumers in Russia are twice as likely to want to impress their visitors (14%) with inspiration particularly taken from television shows (60%) and the internet (53%).
- Russians are the most likely to tackle structural alterations (21%) without the help of a tradesman.
- Energy saving measures, such as new heating controls (25%) and cavity wall insulation (21%), are more popular in Russia than elsewhere. Heating (17%) and other insulation (10%) are also particular priorities.
- Female respondents report they would be more likely to tackle DIY (31%) if they could get more help and advice from specialist staff at their local store.

## Country data



140.4m<sup>1</sup>  
Total population



60%<sup>22</sup>  
of housing stock is more than 25 years old



43%<sup>27</sup>  
of the population has access to the internet



52.7m<sup>1</sup>  
Number of households



3.8%<sup>23</sup>  
Projected GDP growth for 2013



30%<sup>28</sup>  
of households have a broadband subscription



70%<sup>21</sup>  
owner-occupied



10.29%<sup>24</sup>  
Average inflation 2008-2011



4,561<sup>1</sup>  
Energy consumption per head (kg oil equivalent)



7.5%<sup>25</sup>  
Average unemployment 2003-2010

# SPAIN



## FAB FACTS

64.6% of the population lives in a flat.<sup>(xi)</sup>

Spain imports 78% of its net energy consumption.<sup>(xii)</sup>

- Although home improvement spending in Spain is set to drop over the next year – with 33% of respondents saying they plan to spend less – Spanish consumers were the second highest spenders on home improvement in the last 12 months.
- ‘Improve don’t move’ is the Spanish home improvement mindset, with 60% planning on staying in their current house for over a decade.
- There has been a steady rise through the age groups in planned home-working adaptations (from 21% for those in their 20’s and early 30’s to 42% for those over 65). 16% of Spanish respondents have adapted their home over the last five years to accommodate children staying at home for longer.
- Kitchens (16%), bedrooms (16%) and dining rooms (10%) all figure on their lists of projects of which they are proud. But Spanish consumers are planning on focusing on bathrooms (20%) after internal painting and decorating (48%) and home furnishings (30%), in the next 12 months.
- Spanish home improvers take their inspiration from design and style magazines (39%), browsing DIY stores (36%) and the internet (36%), finding them more influential than TV shows on home improvement (30%).
- Apart from painting and decorating (53%) and small ad-hoc repairs (49%), the Spanish are more confident at electrical jobs (23%).
- The Spanish are not keen gardeners (lowest of all of the countries surveyed at 35%), but their interest in generating renewable electricity (54%) and hot water (43%) via solar/solar PV panels is high.

## Country data



45.3m<sup>1</sup>  
Total population



87%<sup>3</sup>  
of housing stock was built after 1946



63%<sup>33</sup>  
of the population uses the internet



17.6m<sup>1</sup>  
Number of households



-1.3%<sup>30</sup>  
Projected GDP growth for 2013



23%<sup>1</sup>  
of the population has a broadband subscription



83.2%<sup>15</sup>  
owner-occupied



1.8%<sup>31</sup>  
Average inflation 2008-2011



2,756<sup>1</sup>  
Energy consumption per head (kg oil equivalent)



9.1%<sup>32</sup>  
Average unemployment 2003-2010

# TURKEY



## FAB FACTS

In 2010 17% of all Turkish households were three generation households.<sup>(xiii)</sup>

Median population age in Turkey is very low at 28.5.<sup>(xiv)</sup>

55% of senior citizens would prefer to live with their families as they grow older.<sup>(xv)</sup>

- House-proud Turkish consumers (44%) are second only to Russians in being likely to spend more on the home in the coming year, with the younger generations particularly regarding home improvement as a hobby (32%).
- A quarter of Turkish consumers make home improvement investments to increase the value of their home (26%). Turkish respondents also tend to move more frequently.
- Households have adapted to children living longer at home (21%), as well as other family members coming to live with them (24%).
- Turkish women (43%) are more likely than men (36%) to make changes simply to refresh the home environment, rather than to increase its value.
- Women (56%) are also more likely than men (46%) to be influenced in their style decisions by television shows on home improvement and far more influenced by blogs (11%). Men are more receptive to what they see first-hand in friends' homes (20%).
- Generally, Turkish people are more likely to call in professional help.

## Country data



75.7m<sup>1</sup>  
Total population



81%<sup>36</sup>  
of housing stock  
built after 1970



43%<sup>40</sup>  
of the population  
uses the internet



18.6m<sup>1</sup>  
Number of households



3.5%<sup>37</sup>  
Projected GDP growth  
for 2013



10%<sup>1</sup>  
of the population has a  
broadband subscription



74%<sup>35</sup>  
owner-occupied



8%<sup>38</sup>  
Average inflation 2008-2011



1,395<sup>1</sup>  
Energy consumption per  
head (kg oil equivalent)



9.9%<sup>38</sup>  
Average unemployment  
2005-2010

# GERMANY



## FAB FACTS

Prices of newly built flats rose more than 10% in Berlin, Frankfurt and Dusseldorf in 2011.<sup>(XVI)</sup>

38.6% of German households have only one occupant, the 5th highest single occupancy rate in the world.<sup>(XVII)</sup>

- The Germans are the biggest online buyers of home improvement and DIY products with 48% buying online compared to the overall average of 35%.
- 26% of Germans are planning to increase their home improvement spending in the coming year.
- Germany tops the home improvement confidence table with assured skill levels in every category, including complex jobs such as plumbing (25%), electrical projects (29%) and structural work (21%).
- Germans are second only to those in the UK and Ireland for their keenness on making improvements to their gardens and outside spaces, ranking it third on the list of improvements they are planning (27%).
- 24% of Germans have grown their own vegetables in the past five years and they show a greater tendency to adapt the home for BBQs and other forms of outdoor entertaining (25%).
- Two thirds of Germans like the way their homes keep changing and improving because of the improvements they have made. However, in Germany and Turkey, consumers are most likely to undertake home improvements to increase the value of their home (both 26%).
- They are also, along with the Polish, the population most inspired by places they have visited (26% and 27% respectively).

## Country data



82.1m<sup>1</sup>  
Total population



46%<sup>3</sup>  
of housing stock was built between 1946 and 1970



79%<sup>13</sup>  
of the population has an internet connection



40m<sup>1</sup>  
Number of households



0.9%<sup>11</sup>  
Projected GDP growth for 2013



32%<sup>1</sup>  
of the population has a broadband subscription



46%<sup>10</sup>  
owner-occupied



1.6%<sup>12</sup>  
Average inflation 2008-2011



3,889<sup>1</sup>  
Energy consumption per head (kg oil equivalent)



9.1%<sup>12</sup>  
Average unemployment 2003-2010



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# APPENDIX

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## Methodology

Over 15,000 adults, representative by age, gender and region, were interviewed via online survey in the UK and Ireland, France, Poland, Russia, Spain, Turkey and Germany. Respondents were asked about their spending priorities in the coming twelve months and about past and future home improvement spending trends. They were also asked about their attitude to DIY, sources of inspiration, attitude to eco-investments and their use of the internet with relation to their home improvement choices. Fieldwork was carried out during August 2012 by independent organisation MindMetre Research ([www.mindmetre.com](http://www.mindmetre.com)), on behalf of Kingfisher plc. The figures contained within this report have an estimated margin of error of +/-2%. Any published material requires a reference to 'Kingfisher European Home Report'.



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