

BETTER
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Kingfisher

EUROPEAN HOME REPORT 2014

*...our survey of 17,000 people
in nine countries across Europe...*



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Kingfisher plc is Europe's leading home improvement retail group and the third largest in the world, with 1,134 stores in 10 countries in Europe and Asia. Its main retail brands are B&Q, Castorama, Brico Dépôt and Screwfix. Kingfisher also operates the Koçtaş brand, a 50% joint venture in Turkey with the Koç Group.

FOREWORD



As Europe's leading home improvement retailer, Kingfisher's business purpose is to help our customers have better lives through having better homes. To do that, we are dedicated to understanding how they think about their homes and how they want to improve them.

In 2012, we launched the first European Home Report to provide a unique snapshot of how Europeans view their homes and their attitudes towards DIY and home improvement. Now, two years later, we launch the second instalment to see how things have moved on and to provide further insight into what householders in Europe are worried about, what they aspire to and how they are updating their homes to suit 21st Century living.

We captured responses from more than 17,000 men and women from the markets in which we operate – France, the UK, Ireland, Poland, Spain, Russia, Romania, Turkey and Germany, representing a total population of 537 million. What was clear was that home improvement is high on the agenda with nearly all adults (86%) doing some form of DIY or home improvement and that there are a wide range of motivations, plans and fears about the home.

Our findings reveal four main themes. The first is that modern homes are changing. With increasing pressure on space, people want to adapt their homes to changing lifestyles and demographic shifts, such as working from home, children staying longer in the family home, or elderly parents moving back in. Consequently, people are seeking to create more versatile spaces that are adapted to modern living.

Secondly, there are signs that spending on the home is back on the agenda after several years during which the economic downturn and austerity measures affected home improvement budgets.

The third clear message from the survey is that rising energy bills are now people's number one concern about their homes, bigger even than paying the mortgage. As a result, people are increasingly considering investing in energy saving measures.

And finally, our survey also shows that people's attitudes to DIY and their ability to undertake certain jobs varies enormously by country. For example, the Germans are the most likely to undertake a major structural job, such as building an extension, whereas the Turkish are the least confident DIYers, with half being uncertain how to change a light bulb. The British continue to be the gardeners of Europe, whilst the Poles are the most likely to have a go at installing a full central heating system.

It all adds up to a fascinating picture of modern living, showing that people want more and more from their home as they seek to have a better life.

Sir Ian Cheshire,
Group Chief Executive,
Kingfisher plc

KEY FINDINGS

The adaptable home:

Changing lifestyles and demographic shifts mean that homes need to be increasingly flexible spaces that adapt as our lives change.

Our families are changing, therefore so are our homes: 77% of people want to adapt their home for changing family needs such as the arrival of a baby or children living at home for longer.



Homes are needed for work and play:

Today, nearly half (47%) of people have, or would like, a home office and over a quarter (27%) have, or would like a games room.

We're becoming more aspirational. The most desired features are:

Swimming pools 28%

Fireplaces 26%

Conservatories 23%

Hot tubs 22%

Home improvement priorities in the next five years:

Energy efficiency 31%

More space 22%

Space for 'entertainment' 17%

'Working-from-home' 15%



Spending on the home, back on the agenda:

Following a tough economic period, people are on average planning three home projects in the year ahead – from redecorating to adding extensions. The Russians are planning the most.

Home improvement is again seen as a value creator: More than two thirds of Europeans (68%) are making home improvement changes to increase the value of their home. This is a big shift from the 17% recorded in 2012.

In the next 12 months Europe's top project priorities are:

Painting and decorating 40%
Gardening 21%
Lighting 18%
New kitchen or renovation 17%





KEY FINDINGS

The fear factor – rising energy bills:

Rising energy bills are householders' greatest concern right across Europe, even ahead of keeping up with rent or mortgage payments.

65% fear rising energy prices, 40% worry about paying bills, 36% are concerned about maintenance and upkeep and 23% are concerned about keeping up with their mortgage.

We are improving energy efficiency to make the home cheaper to run – three quarters (74%) are eager to improve energy efficiency with a view to keeping costs down.

We're now eight times more likely to prioritise energy efficient changes than two years ago, with 31% planning to make energy efficient changes, compared to only 4% in 2012.



DIY confidence:

Confidence at doing DIY ourselves varies significantly from country to country, with Germany and France leading the way.

The DIY confidence Leaderboard:

1st Germany, France
3rd Poland
4th Russia
5th Spain, UK
7th Ireland
8th Romania
9th Turkey

Top 5 skills in Europe:

1. Painting & decorating **73%**
2. Assembling flat pack furniture **60%**
3. Cutting the lawn **58%**
4. Unblocking the loo **57%**
5. Putting up shelves **57%**

We love DIY:

86% enjoy DIY
42% say DIY is rewarding
36% say it provides a sense of achievement

Britain buys online:

46% of people in Britain buy home improvement products online, the highest in Europe. France is the least likely. The UK is the country most likely to use 'click & collect'.



DIY can help you find love:

Aside from personality and looks, being capable around the house is considered the third most desirable feature in a potential partner.

Desirable features in a potential partner:

1. Intelligence **67%**
2. Cultured **53%**
3. Practical around the house **48%**
4. Can cook **40%**
5. Likes animals **35%**
6. Knowledge of current affairs **34%**
7. Well-dressed **31%**

THE ADAPTABLE HOME

The 21st Century home is changing. There is an increasing need to adapt homes to changing lifestyles and demographic shifts, such as working from home or children living at home for longer.

Since 2012, there has been a shift in the reasons for undertaking home improvements. Two years ago, the emphasis was on refreshing the home (52%) and making it more comfortable (48%). In 2014 the focus has shifted to adapting the home for changing family needs (77%).

In the past five years, 14% of people say they have had to make changes to their homes to accommodate additional family members moving in with them and 12% for the arrival of a new baby. 22% are planning to create more space in the next five years.

Nearly half (47%) of people say they already have, or would like, a home office and over a quarter (27%) have, or would like, a games room.

In 2012, 24% told us they thought they would need to adapt their home for working from home in the next five years. In the UK, which has the smallest homes in Europe*, outside space is valued highly when selecting a home (62%).

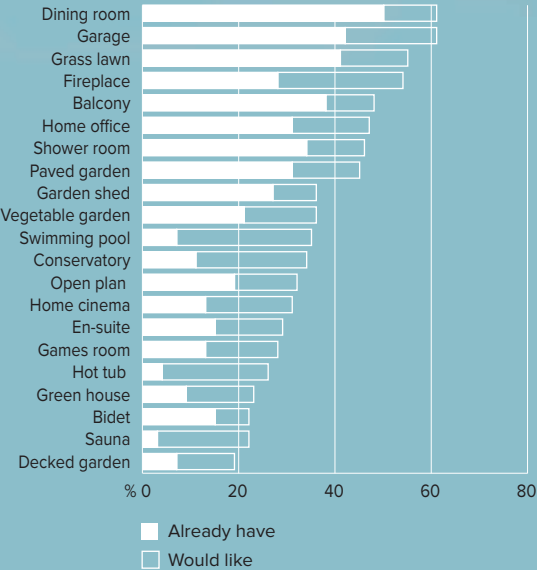
Many people say they have already adapted their home for work (18%) and entertainment (24%) purposes and many are looking to do this in the next five years (14% and 17% respectively). People in Turkey are most eager to make these changes and those in Germany are the least.

The most popular job being prioritised for the year ahead is painting and decorating (40%), followed by doing up the kitchen (17%) or bathroom (16%). 21% are looking to improve the garden. People in Romania and Russia are planning the most projects.

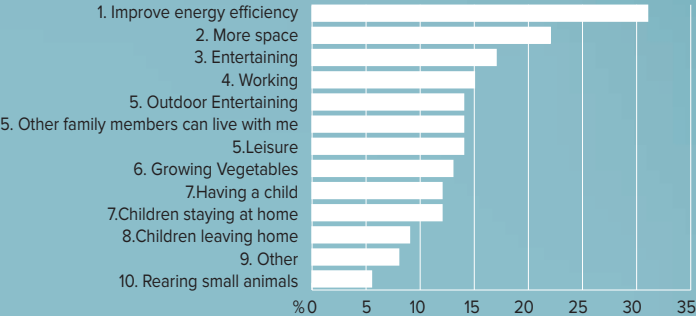
People increasingly see their homes as a badge of success and are undertaking home improvements to impress visitors (39% versus 8% in 2012). A third (34%) are also influenced by the amount of home improvements done by their neighbours (versus 2% in 2012). This may explain why 28% of respondents say they would like to add a swimming pool to their home and 22% a hot tub.

Another large motivation for making home improvements in the 2014 survey is to increase the value of the home. Over two-thirds (68%) say they are motivated by this, versus only 17% of respondents in 2012.

Which of the following do you have, or would like to have, in your home?



Top 10 Future Adaptations in Europe in the next five years



SPENDING ON THE HOME BACK ON THE AGENDA

The economic downturn has hindered home improvement plans in recent years as spending power has been reduced. But people tell us that home improvement is a clear priority as the economy improves, with people planning to stay in their home for a longer period of time and adapt it to changing needs. Increasing numbers plan to move house in the next 12 months, which may drive an increase in spending.

Three quarters of Europeans (77%) say they have reduced the amount of home improvements undertaken in recent years as a direct result of the fragile economy.

But as recession moves to recovery, home improvement is at the top of the agenda.

Europeans say they are more likely to spend a windfall on home improvements (47%) than other options such as a car (29%) or a holiday (44%).

On average, Europeans say they are planning three projects in the next 12 months, with Russia planning the most projects (4) and France the least (2.2).

The top five priorities for home improvement spending over the next 12 months are internal painting and decorating (40%), the garden (21%) and lighting (18%).

These are followed by a new kitchen or renovation (17%) and soft furnishings (18%).

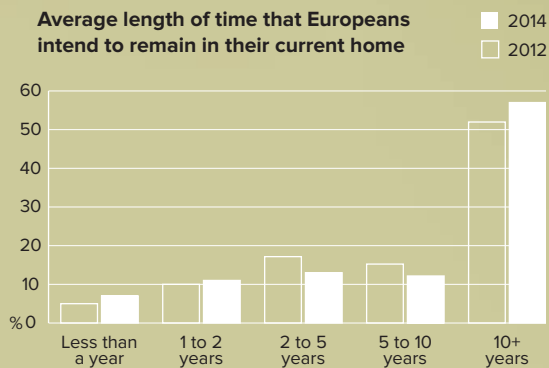
Evidence may suggest that consumer confidence is returning, but customers remain value conscious – when buying home improvement products most people (73%) are motivated by value for money and quality (56%).

On average, people in Europe have lived in their home for seven to eight years.

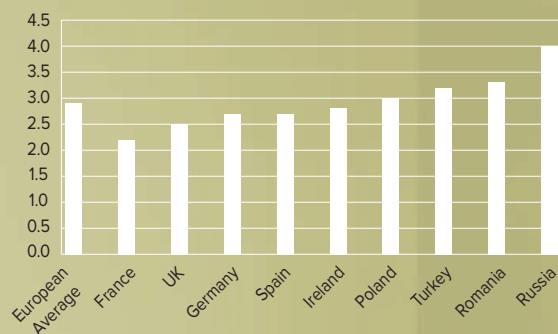
Since 2012, the number of people planning to stay in their homes for ten years or longer has increased by 10% (from 52% to 57%)

The number of people planning to move house in the next 12 months has also increased from 5% in 2012 to 7% in 2014. In the UK, the figure has risen from 5% to 8%, one of the biggest increases in Europe.

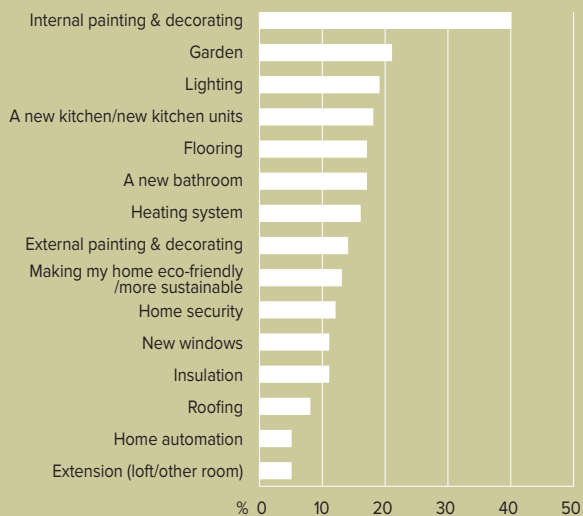
Average length of time that Europeans intend to remain in their current home



Average number of projects planned per country in the next 12 months



Home improvement jobs planned for the next 12 months across Europe



THE FEAR FACTOR: RISING ENERGY BILLS

Rising energy bills are the number one concern of householders – a greater worry than meeting the rent or mortgage payments. This is driving a growing interest in energy efficiency measures in the home – a trend that is visible right across Europe.

Europeans are increasingly concerned about rising energy costs. Asked to name their biggest fear regarding their homes, 65% of respondents stated rising energy bills. This made it the number one concern in all European markets, greater than keeping up with rent or mortgage payments (23%).

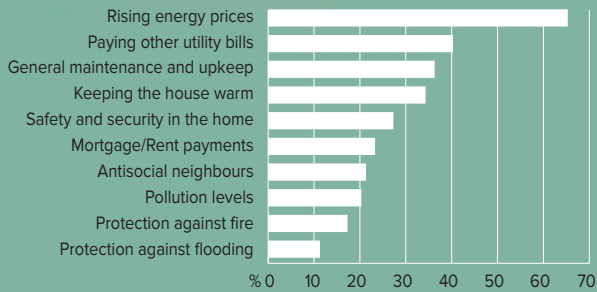
There has been a major change in attitudes since 2012, when just 4% of people said they planned to make energy efficiency improvements to their home. Now the figure is 31%.

Energy efficient light bulbs are considered the start-point in battling higher energy costs with half (50%) of those surveyed saying they would represent the best energy-efficiency investment for the home followed by renewable electricity (46%), double glazing (38%), and low flush toilets (30%).

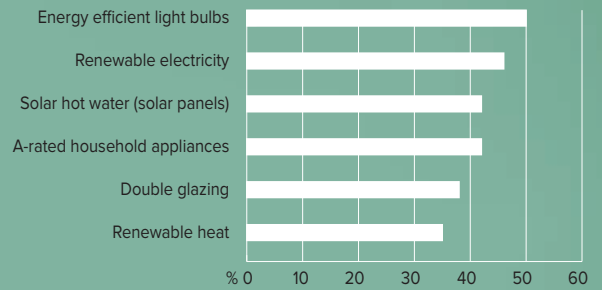
The over 55s are significantly concerned about rising energy prices (72%) and keeping warm (41%), while younger generations (18-34 year olds) are more worried about keeping up with rent or mortgage payments (30%). Other concerns include pollution (20%), and rising utility bills (40%).

Across the board, awareness about energy efficiency measures has risen since 2012, with those in Ireland and Poland being the most aware of the energy efficient options available to them.

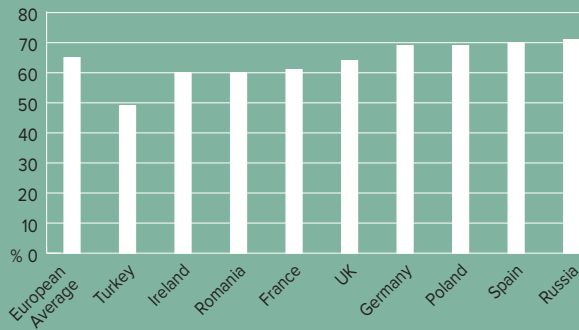
What we're most worried about in relation to the home



The best eco-friendly/energy efficient investments for the home



% of people saying rising energy costs are their biggest home concern



DIY CONFIDENCE

The French and Germans claim to be the DIY kings of Europe, with a high proportion saying they are able to take on big jobs like extensions or major plumbing work. Those in Russia and Poland are also very capable – and are the most confident in Europe when it comes to installing a new boiler or central heating system.

There is some evidence to suggest that Europeans are becoming better DIYers. Since 2012, there has been a significant increase in the amount of people who feel competent at painting and decorating (63% in 2012; 73% in 2014); confidence in installing insulation has risen from 10% in 2012 to 18% in 2014; landscaping confidence has gone up from 16% to 40%; carpeting/flooring has increased from 24% to 33% and tiling competence from 19% to 24%.

The top three skills across Europe are painting and decorating (73%), changing light bulbs (76%) and assembling flat-pack furniture (60%). People are less capable when it comes to electrical jobs (23%) and plumbing (18%).

The French and Germans are the most confident in their DIY skills – selecting competency in 10 typical DIY jobs while those in Turkey are the least, selecting an average of four jobs from a selection of 22. The French and Germans said they would tackle larger jobs, like building an extension or installing a new kitchen or bathroom. By contrast in Turkey, 50% said they would not be confident changing a light bulb. The UK scored highly for gardening.

Men claim to be better than women in three quarters of tasks inside the home, selecting capability in doing 18 out of 22 typical DIY jobs. Women are more confident outdoors at jobs such as landscape gardening and growing vegetables (58% and 42% respectively).

In general, older generations feel more confident than younger generations when it comes to performing DIY jobs; 65% of over 55s are competent lawn mowers, compared to 46% of 18-34 year olds.

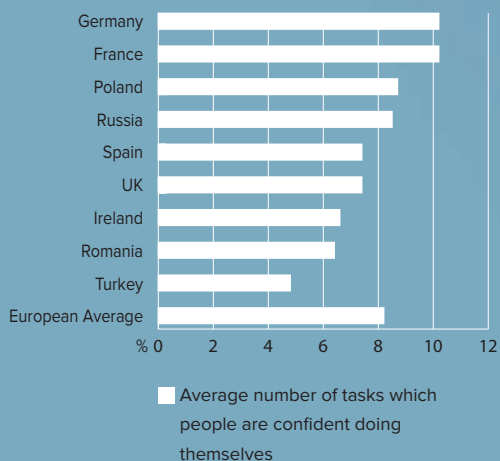
When it comes to those who prefer to ask a tradesman, rather than tackle a job themselves, 60% say it is because the job is too difficult, while more than a quarter (28%) say they do not have the time and 53% say they are seeking a “professional finish”.

The French are least likely to hire someone else to carry out their home improvement jobs and are the least likely to assume a job would be too complicated for them.

90% of Europeans say they enjoy home improvement. Nearly half (42%) say DIY is rewarding (47% in 2012), 36% say it gives them a sense of achievement and one in five (20%) consider it a hobby (24% in 2012). Twice as many over 55s look to DIY as a means to keep them fit and healthy (20%), compared to 10% of 18-34 year olds.

And, it's official, DIY is good for your love life; 61% of women say they are attracted to a partner who is practical around the house. Men are more likely to prioritise a partner who can cook, over one who is adept in DIY skills. Nearly twice as many over 55s (54%) are likely to prioritise practicality versus 30% of the 18-34 group. Overall, being intelligent, cultured and practical around the house are the top three most desirable qualities in a partner.

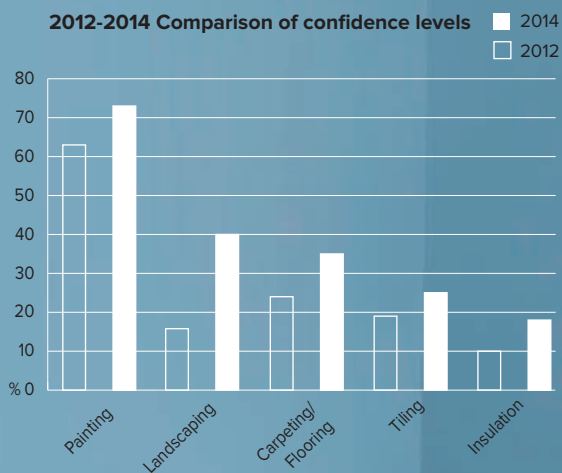
DIY skills confidence league table



Top 10 tasks which Europeans are confident doing themselves



2012-2014 Comparison of confidence levels



COUNTRY HIGHLIGHTS



Key household data

Country	Population (m)	Number of households (m)	Home owners as % of population	% living in a house/ % living in a flat	Homes with a garden/outside space (%)	Population living with leaks/damp (%)
France	63.5m	27.7m	58%	56/44	58%	12.8%
UK	63.7m	27.9m	67%	80/20	81%	17.2%
Ireland	4.6m	1.7m	70%	95/5	–	13%
Poland	38.5m	13.4m	71%	46/54	80.3%	10.5%
Spain	46.1m	17.4m	79%	35/65	27%	12.0%
Russia	143.7m	52.7m	85%	26/74	40%	–
Romania	20.1m	7.4m	97%	62/38	59%	15.4%
Germany	81.9m	40.1m	46%	45/53	–	13.5%
Turkey	75.1m	20.1m	67%	49/51	–	40.6%

Population and homeowner data was compiled by Eurostat from national statistical institutes across Europe and provides comparable data for the EU. Data comes from population censuses, micro-censuses and household sample surveys, (Eurostat.eu)

FRANCE

Joint most capable at DIY in Europe with Germany. Both nations say they're confident doing an average of 10 jobs out of a list of 22 common DIY tasks



The French are the most confident nation at 8 of 22 key DIY jobs, in particular painting (83%), tiling (39%), installing a new kitchen or bathroom (28%) and insulating the home (31%)

In the last 5 years, 28% say they have adapted the home to be more energy efficient, 2nd only to Ireland (30%)

3rd most likely nation to invest in energy efficiency measures (34%) in the next 5 years, behind Germany and Ireland

Top of the French home improvement wish list is adding a conservatory, followed by a swimming pool

Only 13% would prioritise spending money on a treat for a partner over going on holiday or doing home improvement

Least likely nation to say they don't have time to do DIY or home improvements themselves (22%)

Least likely nation to hire someone in to do their home improvements for them; 11% would never do so



Least likely to use the internet to buy products (21%) or read customer product reviews (23%)

Least likely to consider a retailer's reputation (21%) or the stylishness of a product when selecting home improvement products (12%)

52% value a garden or outside space as the most attractive feature of a new home



UK



Most likely nation to buy DIY products online (46%) and most likely to use 'click & collect' services (28%)

8% plan to move house in the next 12 months, up from 5% in 2012

Out of all of the household features the UK are most proud of their living rooms (36%)

Top of the UK's wish list is to have a conservatory (29%)

21% have improved the energy efficiency of their home in the past 5 years and 29% think they will need to do this in the next 5 years



Britain remains a nation of gardeners, with above average confidence in vegetable growing (55%) and cutting the lawn (68%)

UK householders say they feel most confident at painting (78%) and least confident at installing a boiler – only 3% would attempt this

2nd most likely nation to have a garden shed (49%), after the Irish (52%)

Most likely nation to want to add an en-suite to their home (26%)



Most likely nation to value a partner who "enjoys drinking" (13%), just ahead of Ireland (12%) and Turkey (10%).

Top of the UK's wish list in a partner are intelligence (64%), ability to cook (40%) and being practical around the house (37%)



IRELAND



Most likely nation to have adapted the home to improve energy efficiency in the past 5 years (21%) and most likely nation to do so in the next 5 years (40%)

Most likely nation to consider a more efficient boiler (42%) and cavity wall insulation (36%) as good energy efficient investments for the home

Least likely nation to seek a property that needs modernising or re-decorating (15%)



Most likely nation to have a fireplace (65%), an en-suite (39%) and a garden shed (52%)

Second most likely to be carrying out external painting and decorating in the next 12 months (24%) and 2nd most likely to be making the home more energy efficient in the next 12 months (18%) after Russia (19%)

Least likely nation to do home improvements in order to show success (24%) or make it as good or better than the neighbours (17%)

The least confident nation in 7 out of 22 key DIY jobs: plastering (8%), laying carpets and flooring (15%), fix a dripping tap (30%), installing a new kitchen or bathroom (8%), electrics (13%), plumbing (9%) and extensions (3%)



2nd most likely nation to use 'click & collect' services (28%)

Top of Ireland's wish list is to have a conservatory (29%)

The Irish are most proud of their living rooms (37%)

POLAND



Plumbing remains a key national skill, with 15% saying they could install a new boiler or central heating system, the highest of any European nation

The nation most likely to have adapted the home for leisure activities (49%), outdoor entertaining (28%) and growing vegetables (23%) in the past 5 years



Most likely nation to have a home cinema (26%) and a vegetable garden (31%)

2nd most likely to have a fireplace on the home improvement wish list (37%), after Russia (43%)

3rd most likely to have a sauna on the home improvement wish list (23%) after Russia (29%) and Turkey (24%)

49% would prioritise their spending on a holiday, but home improvements would come first (52%)

15% think they will need to adapt the home for children living longer in the home in the next 5 years

Joint most likely nation to stay in the home for 10+ years (71%) with Germany

86% are motivated to make home improvements to improve the use of energy efficient or sustainable products and materials in the home



Most likely nation to join online advice forums about home improvement/DIY (34%)

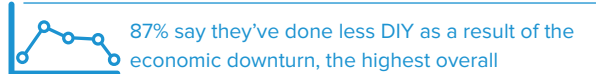
Most worried nation when it comes to the general maintenance and upkeep of the home (45%) and 2nd most worried nation about keeping the home warm (48%) after Romania (52%)

69% are worried about rising energy prices

51% say they value a partner who is practical around the home



SPAIN



Most likely nation to have a bidet (62%) and a swimming pool (15%)



Swimming pools are also top of Spain's home improvement wish list, 36% want one

In the last 5 years, the Spanish were 2nd only to Romania in creating more space at home (23% vs 30% respectively)

2nd least likely to have a shed after Turkey (10% vs 8% respectively)

Least likely to have a greenhouse (4%, joint with Romania), lawn (12%, joint with Romania and Russia) or vegetable patch (9%)

The Spanish are the nation most likely to prioritise their spending on holidays (51%) above home improvements (44%) or buying a new car (26%)



Nearly 30% think they'll have to improve home energy efficiency in the next 5 years

The room they are most proud of is the kitchen

2nd most likely nation to be worried about rising energy prices (70%), behind Russia (71%)

RUSSIA

The most confident in Europe at wallpapering (80%), plastering (36%), electrics (36%) and plumbing (34%)

2nd most likely nation to create more space in the next 5 years, behind Romania

The most likely nation to want to improve their home with a fireplace (44%), followed by a swimming pool (38%) and a home office (32%)

The nation most proud of its kitchens (46%)



The nation most worried about rising energy prices (71%), paying other bills (66%), antisocial neighbours (30%) and pollution levels (32%, joint with Romania)

The nation least worried about mortgage or rent payments (11%) and protection against flooding (7%, joint with France)

The Russians value a potential partner having 'lots of money' three times more than the average nation (46% vs 15% average)



...and are the most demanding nation when it comes to the traits they find attractive in a partner, also seeking intelligence (80%), culture (66%), practical around the home (59%, joint with Romania) and well-dressed (42%)

Most likely to replace or renovate the kitchen in the next 12 months (32%)

Most likely nation to be motivated by making the home as good as or better than the neighbours (62%) and to increase pride for the home (84%)

Joint most likely to want to make the home more comfortable with Romania (95%)



ROMANIA



The most likely nation to prioritise spending on home improvements (62%)

Romanians are the nation most likely to seek a home that needs work doing to it (46%)

Most likely nation to want a garage (28%), a greenhouse (23%), a paved garden (32%) and a vegetable garden (22%)



In the past 5 years Romanians were the nation most

likely to have adapted the home to create more space (30%) and are the nation most likely to do this in the next 5 years (32%)

They are 2nd most likely to adapt the home for working in the next 5 years (23%) after Turkey (25%)

2nd most likely to move within 12 months (9%) behind Turkey (15%)

2nd most likely to be replacing or renovating their kitchen (26%) or bathroom (22%) after Russia (32% and 28% respectively)

Most likely nation to be motivated to carry out home improvement because they've decided to improve not move (82%) and to make the home cheaper to run (91%)



Joint most likely nation to be motivated to make home improvements to improve the use of energy efficient or sustainable products and materials in the home (86%) with Poland

Most likely nation to read instructions before starting a DIY job (85%)

The least confident nation at wallpapering (22%) and tiling (14%)

Most likely nation to use the internet to research home improvement products (73%) and to find inspiration for their projects (38%) and written instructions (31%)

Most worried nation about safety and security in the home (52%) and keeping the home warm (52%), protection against fire (37%) and protection against flooding (28%)

Joint most likely nation to prioritise practicality in a partner (59%) with Russia. Least likely nation to want a partner who enjoys drinking (1%)



GERMANY



Joint most capable DIY nation with France. Both nations say they're confident doing an average 10 jobs out of a list of 22 common DIY tasks

The Germans are the most confident nation at 8 of those 22 jobs, with 15% saying they'd build an extension. The Germans are also the most confident in Europe at putting up shelves (76%), laying carpets or flooring (51%) and fixing taps (56%)

They are the 2nd most likely nation to adapt their home to be more energy efficient (39%) in the next 5 years, behind Ireland



The 2nd most likely nation to prioritise their spending on a treat for a partner (23%), behind the Russians (25%), but home improvements (53%), holidays (47%) and a new car (25%) would come first



Most likely nation to want to add a conservatory (32%), followed by a shed (11%) in the next 5 years

Most likely to have lived in their home the longest; 55% have lived in the same place for more than 10 years

Least likely to move in the next 12 months (5%)

Joint least likely to be installing home automations in the next 12 months (3%) alongside the UK, France and Ireland

2nd least likely to do home improvements in order to increase the value of the home (62%) behind Russia (50%)

2nd most likely nation to buy home improvement products online (40%), after the UK (46%)



TURKEY



15% of people say they plan to move house in the next 5 years, the highest in Europe (up from 6% in 2012)

The least confident DIY nation. 50% of people don't feel confident changing a light bulb

The least likely nation to read the instructions before carrying out a DIY project: 26% don't bother

The most frequent DIYers in Europe, 24% say they do it once a week with 22% doing DIY more often than that



In the last 5 years, Turkey is the nation that has done the most to adapt the home to accommodate entertaining (48%) and leisure (37%), so that other family members can live with them (23%) and having children (24%)

In the next 5 years they are the nation most likely to be adapting the home for leisure (26%), entertaining (26%) and working from home (25%)

Most likely nation to want a home cinema (33%) and games room (22%)

Most likely nation to prioritise their spending on further education (24%) or a new hobby (12%), but home improvements (38%), holidays (37%) and a new car (33%) would come first

They are the nation most proud of their children's bedroom (19%) and their spare rooms (17%)

They are the least likely nation to have made improvements to home energy efficiency in the last 5 years (9%) and are the least likely to do this in the next 5 years (15%)

Most likely nation to undertake home improvements in order to increase the value of the home (83%), to show success (73%) and to impress visitors (71%)



Most likely to have a hot tub (9%)



APPENDIX

Kingfisher conducted this research using FTI Consulting's Strategy and Research division. The research was conducted online from 4th-9th April 2014 with the adult general population who undertake home improvements in United Kingdom, France, Germany, Ireland, Poland, Romania, Russia, Spain and Turkey in their local languages.

A total of n=21,901 of the general population were screened, with n=17,050 completes overall from those who are household decision makers and undertake DIY in their household. The breakdown of the respondents who completed the survey in each country are as follows:

France (n=2,277)
United Kingdom (n=2,241)
Ireland (n=1,129)
Poland (n=2,280)
Spain (n=2,230)
Russia (n=2,300)
Romania (n=1,116)
Germany (n=2,266)
Turkey (n=1,211).

The n=17,050 completes yields a 0.75% +/- margin of error with an industry standard 95% confidence interval.

Please note that the standard convention for rounding has been applied and consequently some totals do not add up to 100%.

Population and homeowner data was compiled by Eurostat from National Statistical institutes across Europe and provides comparable and harmonised data for the EU. Data comes from population censuses, micro-censuses and household sample surveys, unless otherwise specified (Eurostat.eu).

"A case for space" a report by the Royal Institute of British Architects (RIBA) September 2011 as part of their ongoing "WithoutSpace+Light" campaign, showed that Britain's new build homes are the smallest in Western Europe

CONTACT

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