



HOME IMPROVEMENT REPORT

Understanding PRO v. DIY Home Improvement Shoppers

March 16, 2022



In this report, we'll examine two key consumer segments within the home improvement industry, the **PROsumer** and the **DIYer**.



PROsumer

82 Home Improvement Trips/HH in 2021

DEFINITION: The Bureau of Labor Statistics (BLS) indicates that between 7-10% of the US workforce are considered "PROs" by the Home Improvement industry. We have taken the top ~8% of our Home Improvement shoppers by trip count and labeled them as "PROsumers".

You might think of this group more as the "weekend warrior" people who might do PRO work on the side.

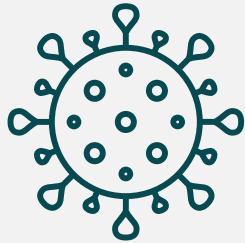


DIYer

15 Home Improvement Trips/HH in 2021

DEFINITION: DIY households are households not included in the above PROsumer definition but have purchased products from the Home Improvement channel.

There's been no shortage of challenges facing home improvement shoppers during the pandemic.



**COVID restrictions
& new variant
emergences**



**Supply chain
disruptions and
labor shortages**



**Unprecedented
price increases**

Despite that, more people are venturing into home projects than before...

40%

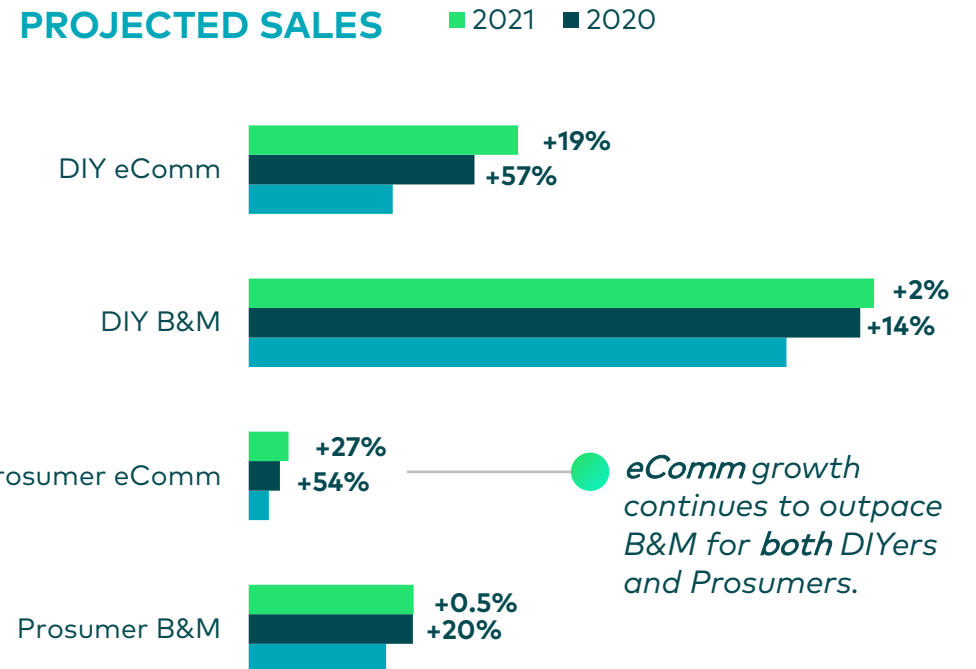
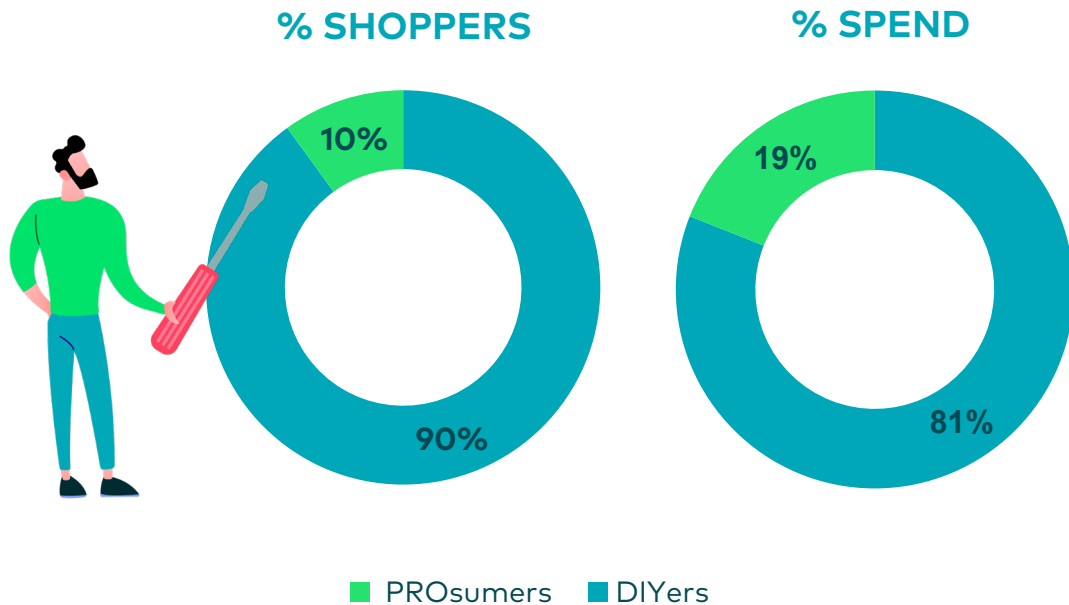
Doing **more** projects than before the pandemic.

45% Doing about the **same** number of projects as before the pandemic.

15% Doing **fewer** projects than before the pandemic.

DIYer spend has grown significantly in both B&M and eComm channels.

While DIYers continue to contribute majority spend in Home Improvement Categories, *the PROsumers spend more than their fair share.*

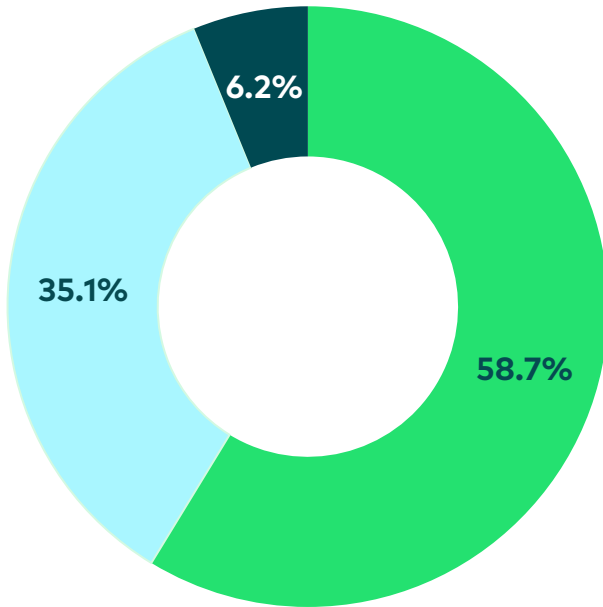




How is the influx of DIYers impacting the Home Improvement industry?

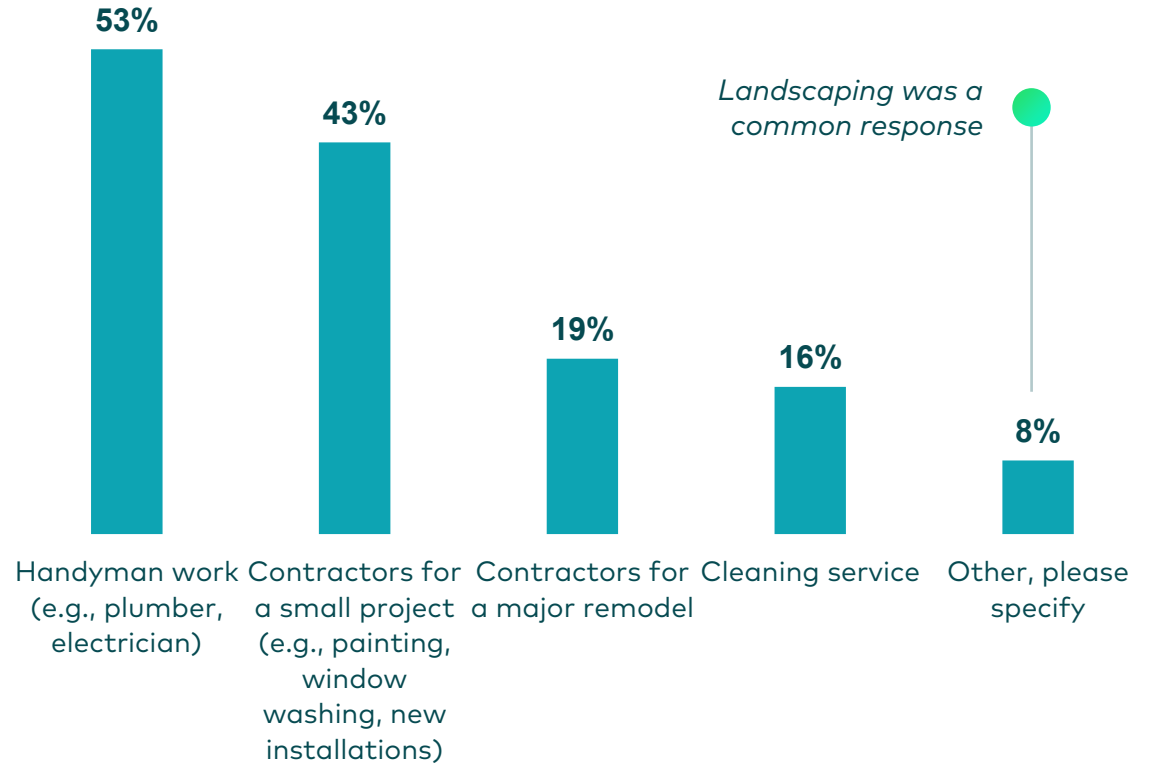
Despite the heightened interest among DIY shoppers, 35% still hired professionals for some of their projects.

Since March of 2020, have you or someone else in your household started any DIY home improvement projects (renovations, redecorating, landscaping, etc.)?



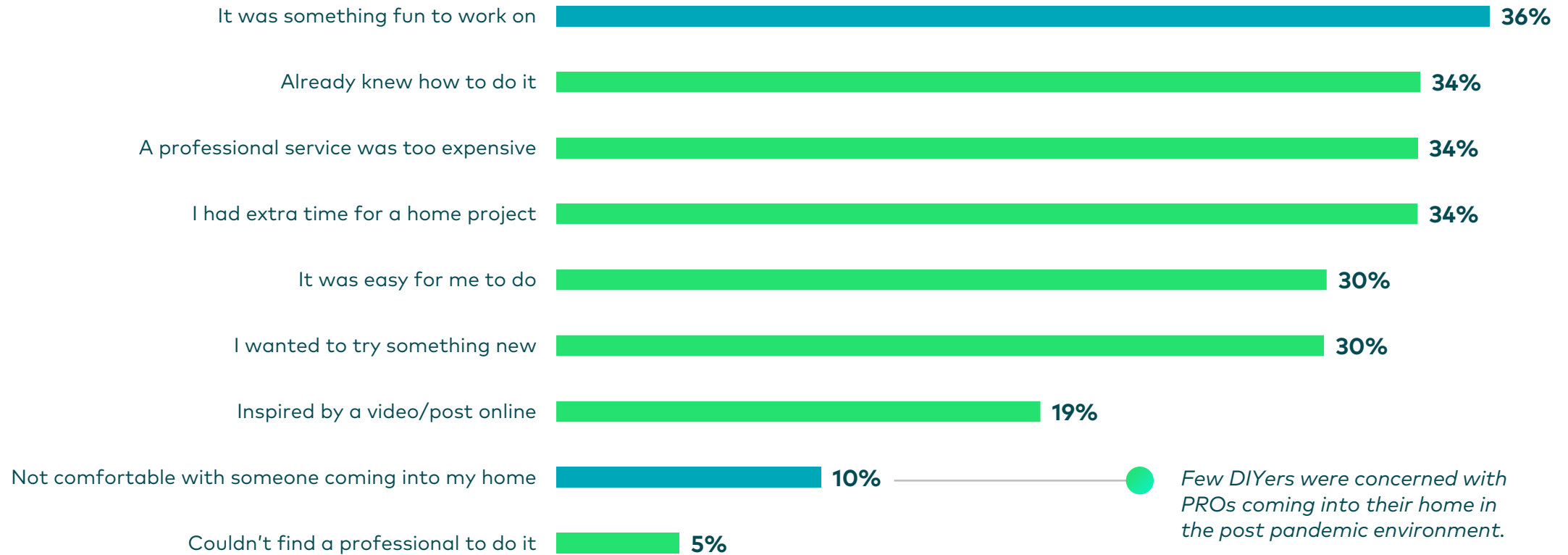
- Yes – and I/we completed all home improvement projects myself
- Yes – and I/we also hired someone else for some home projects
- No – I/we hired someone else for all home projects

DIYers hired PROs for projects that were handyman or small project focused.



Those that forewent hiring a PRO did it for the enjoyment and to save money and were *not* motivated by COVID factors.

What are some reasons why you, or someone in your household, decided to start a DIY home improvement project?



Though most were unconcerned, qualitative research would indicate that there are still families for whom COVID is a risk.



Panelist **Video** Paraphrasing:

Due to a household member falling within the 'higher risk' group, we chose to approach this home project without professional help.

“ My husband did this (*pointing at the gray subway tile backsplash*), my contribution was picking it out”



Who are the **PROsumers**, how do they shop and what are their online attitudes?

The PROsumers are worth 141% more than the DIYers to these Home Improvement categories and retailers.

10.1 M



PROsumer Households in 2021

● Up from 9.5 M in 2019

15%

Started their trade work after March 2020

HOME IMPROVEMENT CATEGORIES, 2021

	PROsumers	DIYers	Index
 Spend per Trip	\$32	\$24	136
 Avg. Basket Spend	\$70	\$66	106
 Buy Rate	\$5,808	\$2,412	241

PROsumers are more likely working on projects that require different parts & materials than DIYers.

% SPEND IN SELECT HOME IMPROVEMENT CATEGORIES BY PROSUMERS, COMPARED TO DIYERS

Total Store (Instore + Online)

Category	PROsumer 2021 vs YA		DIYsumer 2021 vs YA		Index
Plumbing	3.6%	▲	1.5%	▼	243
Paint	7.0%	▲	2.9%	▼	241
Tools	8.4%	▲	3.7%	▼	228
Lighting & Electrical	7.9%	▼	4.3%	▼	184
Hardware	12.6%	▲	9.2%	▼	137
Appliances Parts & Accessories	1.7%	▲	1.3%	▼	127
Outdoor	16.1%	▲	13.0%	▲	123
Automotive	3.6%	▼	4.0%	▲	89
Appliances	10.6%	▲	12.4%	▲	86
Decor (Indoors)	13.1%	▲	20.8%	▲	63
Office	1.7%	▼	2.9%	▲	59
Household	13.7%	▼	24.0%	▼	57

PROsumers tend to be older with higher incomes compared to their DIY counterparts and are more likely to be white.

GENDER (ON TRIP)

Male Adult ONLY

HHs: 34%
Index: **154**



INCOME

High Income (Over \$80k)

HHs: 54%
Index: **119**



HOUSEHOLD SIZE

2 People

HHs: 46%
Index: **140**



GENERATION

Boomers | Millennials

HHs: 47% | 17%
Index: **142** | **63**



ETHNICITY

White/Caucasian | Black/African American

HHs: 77% | 7%
Index: **114** | **64**



EMPLOYMENT

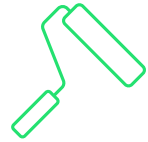
Retired | Full-Time

HHs: 26% | 44%
Index: **157** | 86



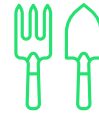
PROsumers tend to like activities that include DIY, Home Projects, Woodworking and Vehicle Maintenance.

HOBBIES WHERE PROSUMERS OVER-INDEX COMPARED TO THE DIYERS



37%

DIY Projects around my Home



37%

Gardening & Landscaping



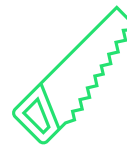
20%

Home Decorating / Furnishing



19%

Barbequing / Grilling



7%

Woodworking

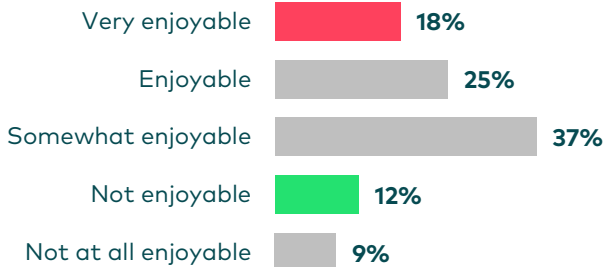


6%

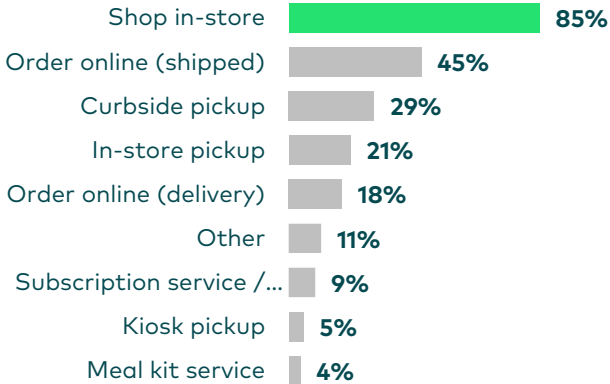
Automotive Repair

Even though PROsumers don't *generally* enjoy online shopping, sales have shifted to the Online channel since the pandemic began.

ONLINE SHOPPING IS...

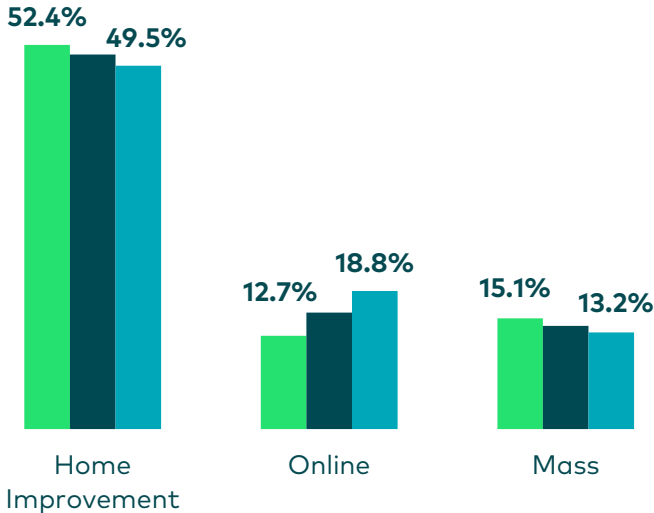


SHOPPING BEHAVIOR (L12M)



PROSUMER SHARE OF WALLET BY CHANNEL

Select Home Improvement Categories

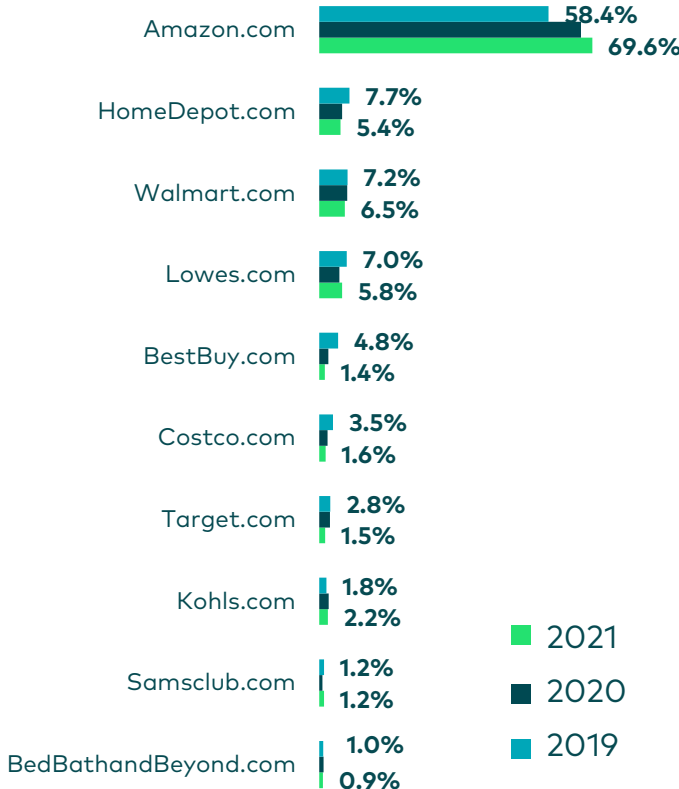


Share of Wallet Change, 2019 to 2021



PROSUMER ONLINE SHARE OF WALLET BY RETAILER

Select Home Improvement Categories



Numerator Insights, Share Explorer
 Psychographics & Media Consumption, PROsumer n: 8,729
 Index vs. DIYers | Over-Index = >115, Under-Index = <85

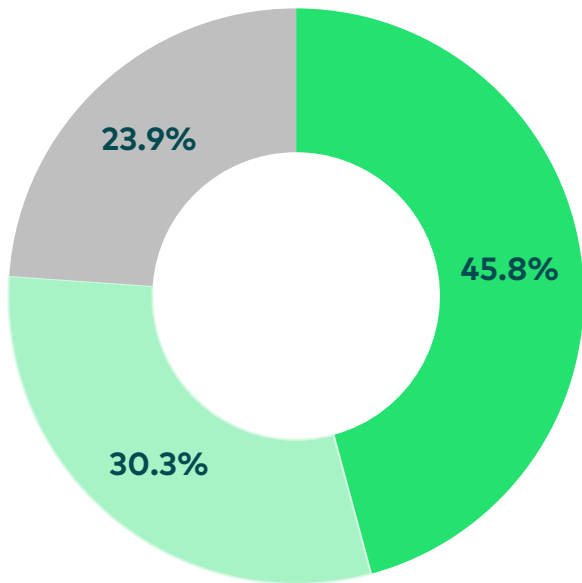




So what changed? Why did PROsumers start buying online and will the trend continue?

More than half of PROsumers noted differences in their business since the start of the pandemic.

Have you, yourself, noticed any differences to your work such as the price of materials, amount of work or hiring practices since the start of the pandemic?



■ Significant differences ■ Minor differences ■ No differences

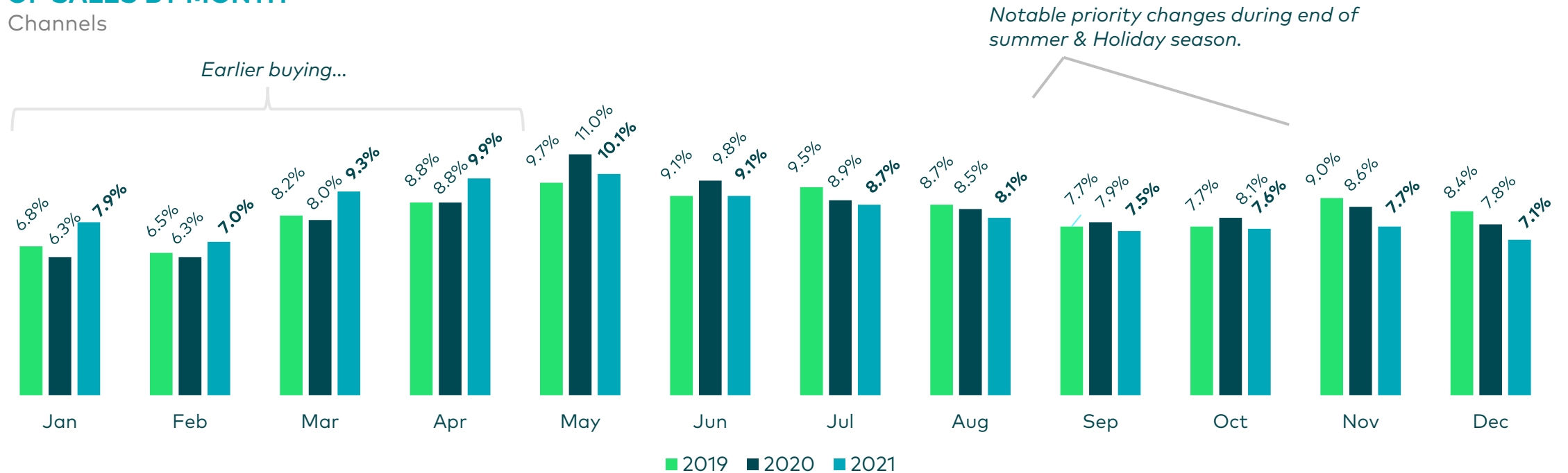
● What differences did you notice in your work after March 2020?

- “Price increases. **Delays due to labor shortage**”
- “Prices of supplies have gone up. **Items are not always stocked.** Hard to get some items. Delivery times are a lot longer.”
- “**Prices have gone up** so much that we have to charge our customers higher to do the work.”
- “The availability of product. Have to drive around the state for supplies. Huge price increases. Not sacrificing quality, so **improvements are taking more time to complete.**”
- “I was off work for 10 weeks in 2020. **I have done more home improvement projects myself.**”

...further, they've have shifted to buying and ordering earlier in the year to make up for a lag in supply chain.

% OF SALES BY MONTH

All Channels

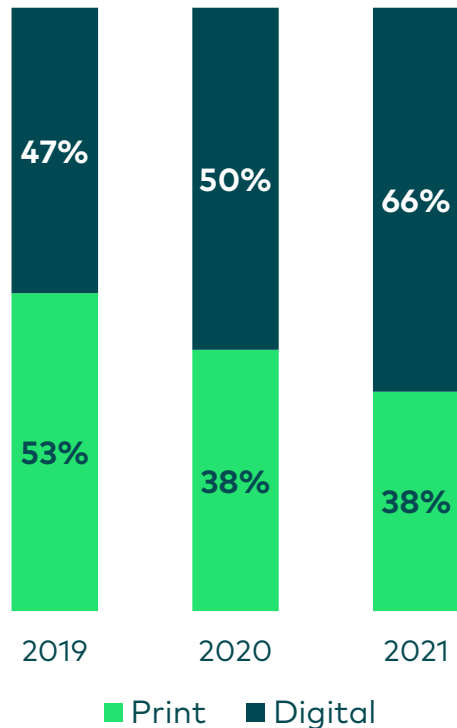


"Numerous times I am not able to get the items that I want because there is either a supply shortage or some other reason. Very frustrating since I'm trying to get my job done and cannot do so sometimes without shopping at multiple stores or ordering online."

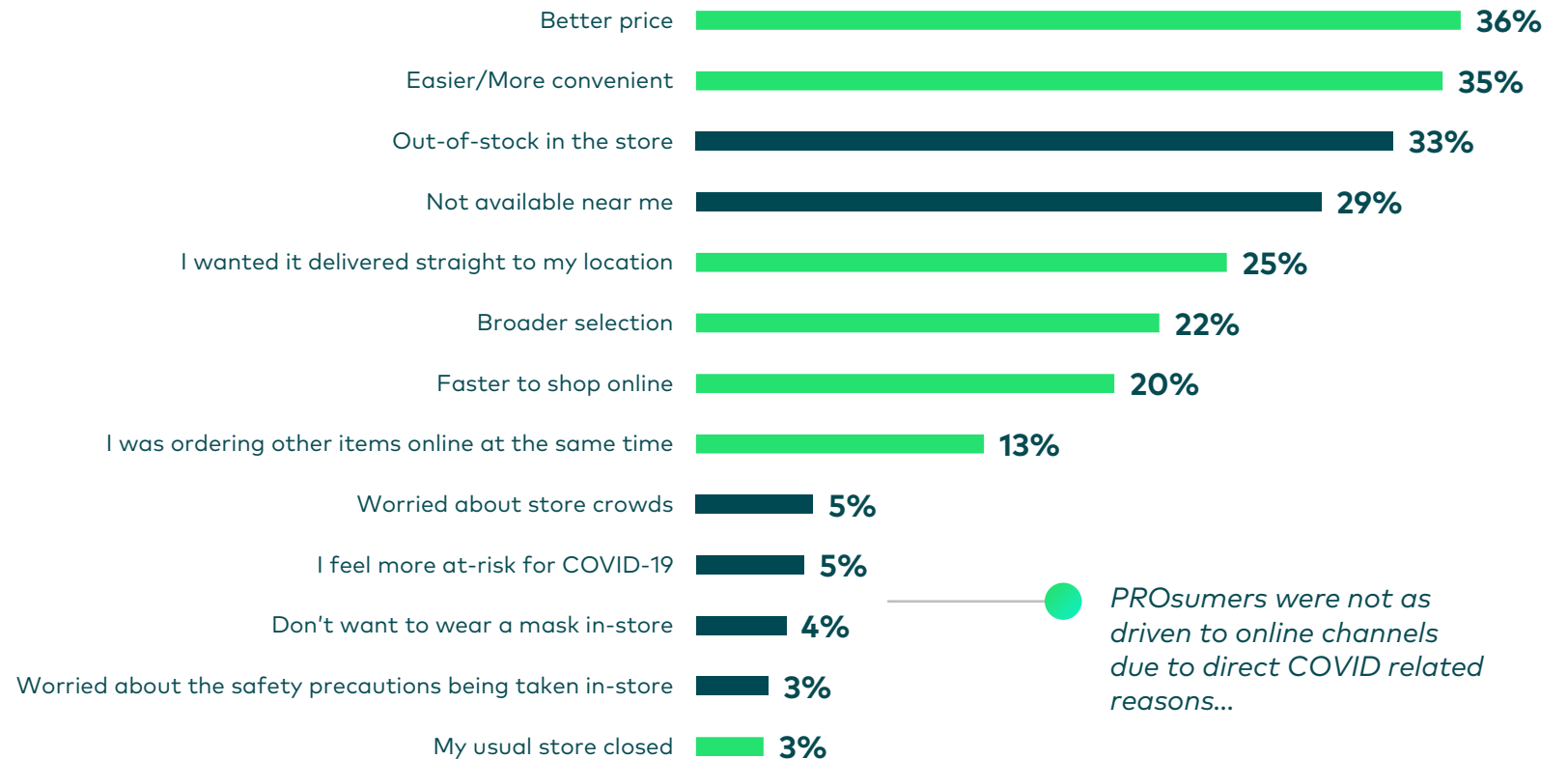
-PROsumer Panelist

In addition to pricing concerns and promotional shifts to Digital, PROsumers went online because they were looking for product they couldn't find in-store.

PROMOTIONAL SHIFTS



What are some reasons why you chose to purchase a home improvement product online versus in-store?

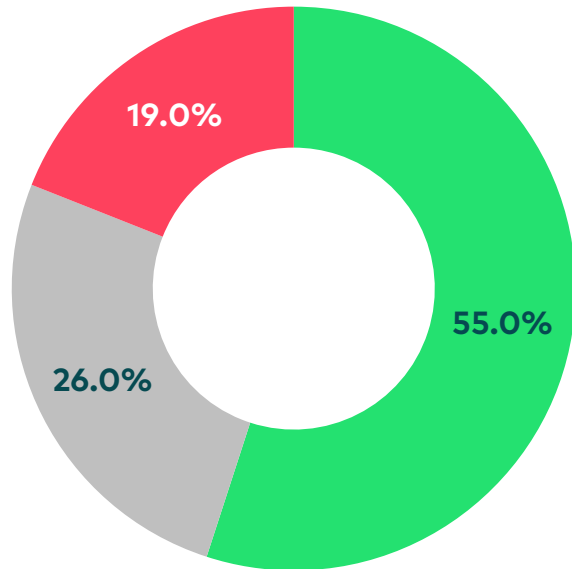




What does the future hold for the **PROsumer** vs. **DIYer**?

55% of DIY households indicate that they are likely to enlist the help of a professional instead of undertaking projects themselves in the future.

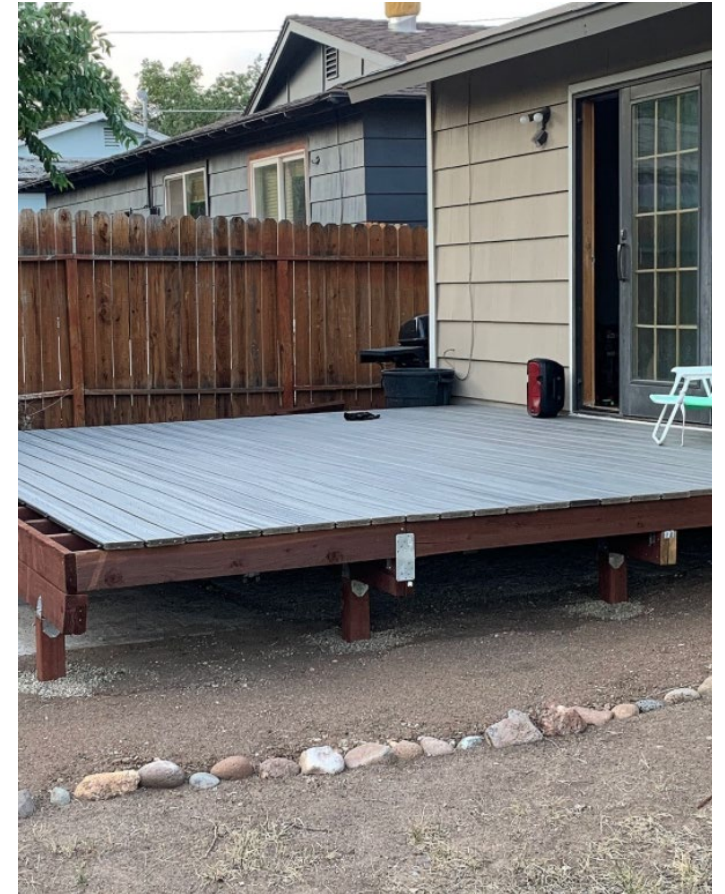
As we get closer to "normal" after the pandemic, how likely are you to hire a professional for any home improvement project?



■ Very or Somewhat Likely
■ Neither likely nor unlikely

Paraphrasing transcripts from one panelist using Numerator's Qualitative survey capabilities, he:

- Described hiring a PRO as being too expensive, so he decided to undertake his project himself.
- Discovered the project was harder than he thought, and needed to find help leveling his deck.
- Indicated he wouldn't try another project like this, but was optimistic the work done would add value to his home.



What we're seeing.

- PROsumers represent roughly 8% of the households shopping the Home Improvement channel.
- PROsumers have been reluctant to shop for Home Improvement categories online but have begun utilizing this channel since COVID began.
- 40% of DIY consumers say they have undertaken more home projects since the pandemic began, but 55% indicate they plan on hiring a PRO in the future.

Why it matters to you.

- A PROsumer household is more valuable, as they spend 141% more than a DIY household, and make 1.5 Trips/week to the Home Improvement Channel.
- Longer lead times to find and source materials, as well as rising cost considerations have the potential to continue to shape the PROsumer purchase journey moving forward.
- For brands and retailers targeting the DIY consumer, discovering pain points for differing projects could lead to longer term brand loyalty.

How you can take action.

- Utilize Numerator's Insights panel to discover how valuable the PROsumer is to your brand, and the changing channel preferences of this important consumer segment.
- Planning online promotions earlier in the year could create more impact for PROsumers as they plan projects earlier.
- **Reach out to your Numerator Representative to find out how our new Qualitative Response capabilities can enrich your understanding of how these consumers shop & use your products.**



There's **More** to Know.

For a custom analysis, reach out to us at hello@numerator.com.

