

A hand is holding an open magazine or book. The left page shows a large photograph of a man with glasses and a beard, with the word 'Cakarel' visible below it. The right page contains several columns of text. In the background, a wooden bookshelf is filled with various books. The overall scene is lit with a soft, warm light, and a pinkish-red gradient is overlaid on the left side of the image.

WINNING WITH THE NEW HOMES AND INTERIORS AUDIENCES: A GUIDE FOR BRANDS

A **DEMOCRACY** Insights report

EXECUTIVE SUMMARY

In 2020, locked in our homes, we picked up our paintbrushes and set to work re-learning how to do it ourselves, transforming spare rooms into workspaces, gardens into entertaining spaces and sheds into everything from classrooms to pubs.

Now more than 12 months into us all living with Covid, communications agency Democracy took the pulse of the nation to deepen its understanding of what opportunities lie ahead for homes and interiors brands keen to leverage their communications strategy to anticipate and respond to changing customer demand.

The survey of 2,000 people in the UK (Jan 2021) indicates that both homeowners and renters, living with a combination of spare time, frustrated holiday plans and the fear of future restrictions, will continue to fuel demand in home improvement.

Quick fixes are giving way to bigger projects and longer term solutions to create living spaces that meet more of their daily needs and allows them to live free from restriction within the safety of their four walls.





EXECUTIVE SUMMARY

Extensions, new kitchens, new bathrooms and more permanent home office spaces are all on the cards - prompting further choices about wall colours, tiles, flooring and lighting further down the line. All of which is great news for the homes and interiors market.

But these consumers are very different to who they were 12 months ago. Increasingly confident in their own abilities following a year of skill building, these new DIY-ers have made mistakes, grown in confidence and are increasingly willing to do it themselves - trying their hand at everything from upcycling and upholstery to tiling and painting.

For brands to win with this audience, it's important for them to recognise the change and respond to it.

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DURING 2020 WE SAW MANY CONSUMERS TACKLING THE QUICKER AND EASIER TRANSFORMATIONAL TASKS. **INTERIOR PAINTING AND DECORATING WAS THE NUMBER ONE PROJECT THAT MANY OF US TOOK ON LAST YEAR**, AS WELL AS INCREASING STORAGE AND TIDYING AND IMPROVING OUR GARDENS.

THERE HAS BEEN A SUBTLE SHIFT IN CONSUMER MOTIVATIONS IN 2021, WITH **RENEWED CONFIDENCE AND INCREASED SAVINGS**, CONSUMERS ARE NOW CLEARLY FOCUSING ON INVESTING IN THEIR HOMES THROUGH STRUCTURAL CHANGES.

SEARCHES FOR NEW KITCHENS, BATHROOMS, REPLACEMENT DOORS AND WINDOWS AND GARDEN ROOMS ARE ALL PEAKING WELL ABOVE 2020.

STEVE COLLINGE, INSIGHT DIY

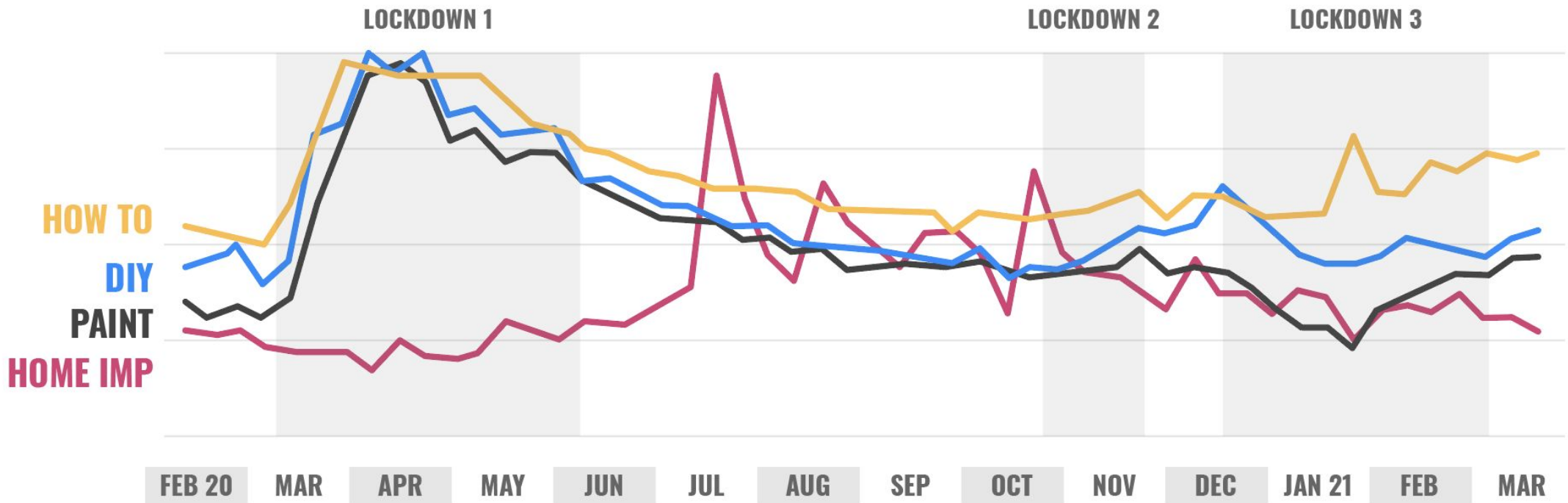
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STEVE COLLINGE

Steve Collinge is an international speaker and thought leader in the homes and interiors sector. A retail influencer and commentator he previously enjoyed roles with Dulux and Cuprinol before becoming MD of the Insight Retail Group and executive editor of Insight DIY - the market leading news and intelligence website for the home improvement and gardening industries.

2020 TRENDS



PAINTING
+76%

GARDEN
+33%

FLOORING
+28%

**CREATING
STORAGE**
+21%

BATHROOM
+18%

EXTENSION
+8%

CONSUMER INSIGHTS

We have all heard the phrase 'new normal' so much in 2020 that it was inevitable it would come to be reality and circumstances we'd never have imagined before would simply be things we adapted to.

Faced with a world of restrictions, **21% of homeowners** cancelled a home improvement project during lockdown and with time on their hands, began to ask 'what can I do?' This meant they started to get to grips with learning new skills and taking on fresh challenges.

When faced with a home decor or refurbishment job, what do you do?

DIY
+35%

USE A PRO
+27%

EITHER DIY
OR PRO
+30%

NOT SURE
+8%

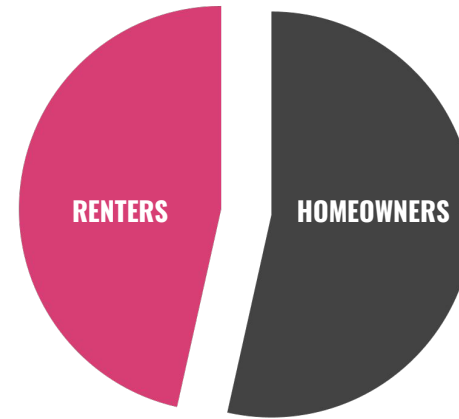
Those who are most confident to have a go themselves are older, with **40% of those aged 35-44 saying they'd attempt a DIY project**, compared to 31% of those aged 16-24. This is also reflected in the preference to hire a professional for a home task - with 27% of those in the 16-24 age group saying that was their first option, compared to 23% of those aged 35-44.

62% of respondents were happy with a tradesman working in their home during Covid with people willing to wait four and a half weeks to get a trades professional in to do a job.

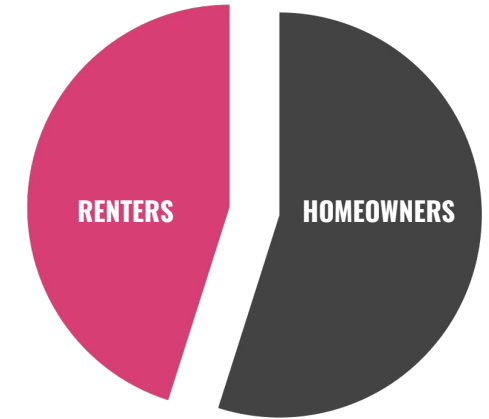


HOMEOWNERS VS RENTERS

Both homeowners and renters have invested in their homes during this time. Generation Rent are now paying attention to the very fabric of their homes, and are just as keen to pick up a paintbrush and a roller as they were in 2020 and make their homes the ultimate dual purpose working/living environment.



Decorated in 2020



Plan to decorate in 2020

	RENTERS	HOMEOWNERS
1	Bedroom	Bedroom
2	Living Room	Living Room
3	Kitchen	Kitchen
4	Bathroom	Garden
5	Garden	Bathroom
6	Office	Office

A man and a woman are painting a wall in a room. The man is standing on the right, using a roller to apply blue paint to the upper part of the wall. The woman is on the left, using a brush to apply the paint to the lower part. The room has a white floor lamp, a window on the left, and a window on the right. There are yellow boxes on the floor. The text is overlaid on the wall being painted.

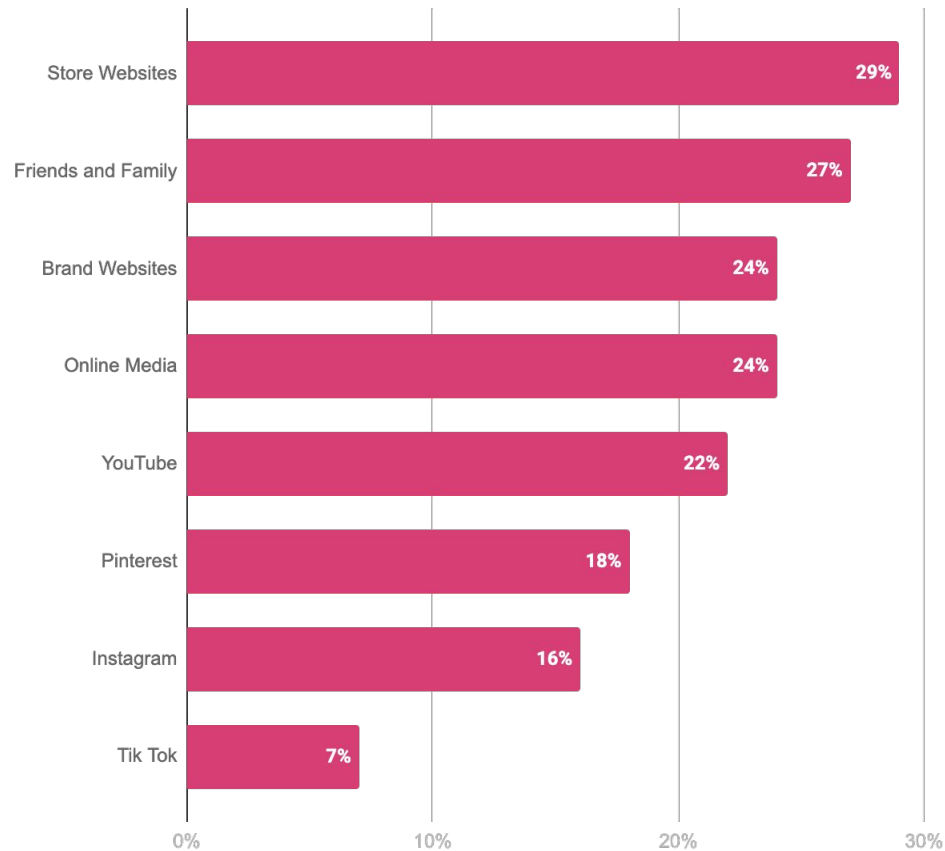
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THERE IS A SIGNIFICANT OPPORTUNITY FOR BRANDS TO TARGET THE YOUNGER RENTAL MARKET. WITH SOME LANDLORDS ALLOWING **GREATER FLEXIBILITY** TO THEIR TENANTS AND WITH INCREASING RANGES OF ‘QUICK FIX’ PRODUCTS AVAILABLE INCLUDING SELF ADHESIVE WALLPAPER, **THIS CONSUMER GROUP IS WAKING UP TO THE OPPORTUNITIES AVAILABLE TO MAKE THEIR HOME THEIR OWN.**”

STEVE COLLINGE,
INSIGHT DIY

SEEKING INSPIRATION

Inspiration remains the key trigger at the very start of the home improvement process. The right content at the right time triggers an emotional reaction within consumers, who are then motivated to find out how they can achieve that look and feel in their own homes. It is now time for brands to no longer rely on retailers to do the job for them, they must reach out to consumers and present them with ideas, inspiration and information that will kick-start that purchase journey.



After store websites, people are looking to online media for inspiration, **24% of people browse online magazines for inspiration**, (this drops to 14% for print media, illustrating the changes in how we now consume news) demonstrating the ongoing value the shopper places in credible journalists as curators of content.

Youtube is the next largest source of inspirational guidance with 22% of respondents turning to the world's largest online video hub.

In the social space, it's **Pinterest** that leads the way (18%) followed by **Instagram** (16%) and with the latest media darling **TikTok** (7%) bringing up the rear.

When it comes to people we know, **27% of us still look to friends and family** to help with inspiration on home projects.



THE CHANGING FACE OF DIGITAL SHOPPING

How do you shop for products for home improvement jobs?



IN STORE
+41%



ONLINE
+40%

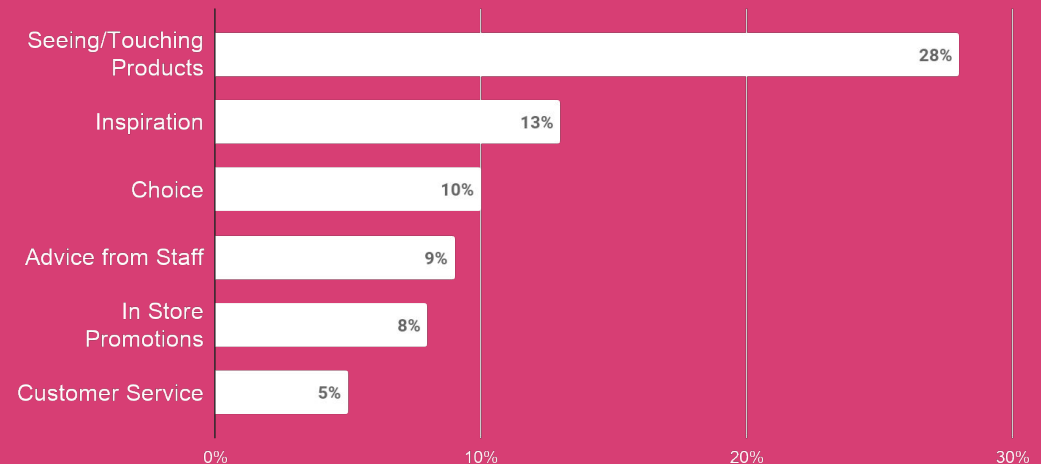


VIA A PRO
+8%

Although in-store remains our preferred way to shop for homes and interiors products and/DIY materials, the opportunity that digital brings to enhance the shopping experience continues to boom as retailers explore new ways to pivot communications.



What do you miss about going in store?



If digital can meet some of the human emotions we get from the in-store experience - the guidance, the entertainment, the thrill, there is an opportunity for digital to open people up to new products they had not previously considered but it's unlikely to ever entirely replace the real world experience we crave.



“

HOWEVER ADVANCED DIGITAL PRODUCTS BECOME, IT IS UNLIKELY THAT A PHONE OR COMPUTER SCREEN WILL EVER BE ABLE TO **SHOW US** WHAT A PAINT COLOUR WILL ACTUALLY LOOK LIKE ON OUR WALLS OR PROVIDE US WITH THE OPPORTUNITY TO **FEEL THE TEXTURE** OF A WALLPAPER OR FABRIC.

STORES WILL CONTINUE TO PLAY A CRITICAL ROLE IN THIS PROCESS, BUT JUST AS IMPORTANT IS THE PROVISION OF SAMPLES. **BRANDS SHOULD BE LOOKING INTO WAYS IN WHICH THEY CAN PROVIDE CONSUMERS WITH A TRUE PHYSICAL EXPERIENCE** WITH THEIR PRODUCTS AND THERE'S NOTHING MORE EFFECTIVE THAN A 'NEXT-DAY SAMPLE' SERVICE TO HELP CONSUMERS MAKE THE DECISION TO CHOOSE YOUR BRAND.

STEVE COLLINGE, INSIGHT DIY

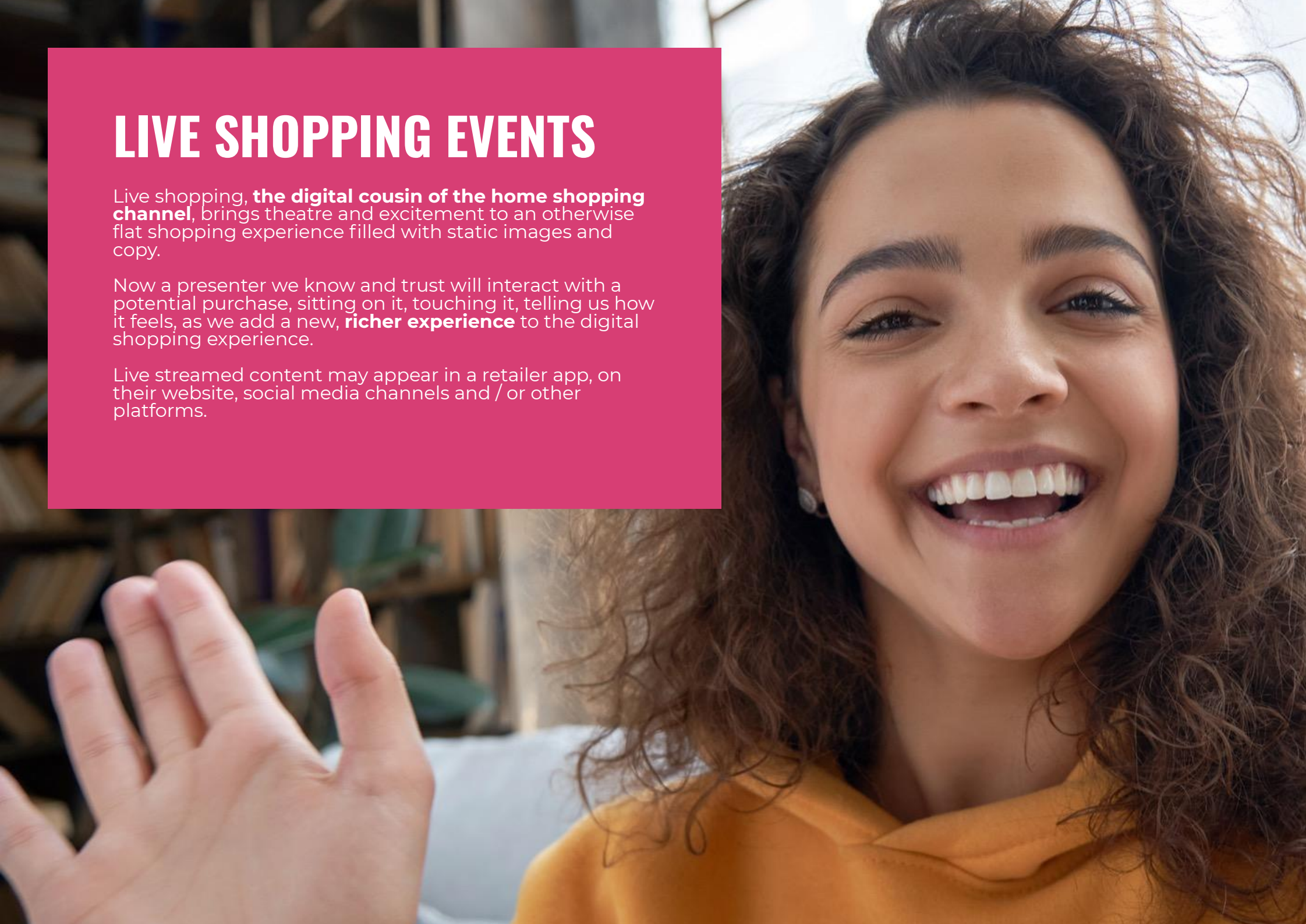
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LIVE SHOPPING EVENTS

Live shopping, **the digital cousin of the home shopping channel**, brings theatre and excitement to an otherwise flat shopping experience filled with static images and copy.

Now a presenter we know and trust will interact with a potential purchase, sitting on it, touching it, telling us how it feels, as we add a new, **richer experience** to the digital shopping experience.

Live streamed content may appear in a retailer app, on their website, social media channels and / or other platforms.



THE CHANGING DYNAMICS OF HOMES AND INTERIORS MEDIA

Throughout lockdown, homes and interiors media experienced a boom in interest with national newspapers and magazines expanding the number of opportunities for brands to appear in product round-ups and style features.

Savvy brands began working on expert tutorial style content from authoritative sources to help DIYers tackle everything from upcycling furniture to weekend room makeovers.

Publishers explored **new ways to attract new audiences** and investments from brands. Both The Times and Real Homes created their own content series on Instagram packed with original content in association with brand partners.

Despite the rising desire for homes and interiors content, journalists working in this space were subjected to job cuts at similar rates to the rest of the news industry.

At Reach (publishers of OK! magazine, New! and the glossy supplements in the Mirror, Express and Star) **one journalist now does the job of three**, acting as gatekeeper to both homes and interiors and food and drink content across all of the national homes and interiors pages and online.

To bridge the gap, editors are **increasingly working with freelance journalists** to contribute to these pages which represents both a challenge and opportunity to brands.

Freelancers, usually difficult for brands to build lasting relationships with due to the versatility of their role, are **increasingly building authority** in their chosen field of expertise online using Instagram. This allows brands to identify and cultivate an authentic relationship with the freelancer between their paid gigs, helping put them in the strongest position for editorial pick up further down the line.





KEY MEDIA CHANGES

- Homes and interiors media have relied heavily on subscribers to maintain print levels with the likes of Homestyle growing its subscribers by 30%
- Gardening media has been performing well with Garden Answers growing its circulation by 35%, BBC Gardeners' World by 31%, Landscape by 28%, and Garden News by 18%
- Futurenet launched gardening website Gardening etc
- House and Garden recorded an increase of 1% in circulation, despite a cover price increase to £4.95 in May. Its digital monthly average readership also increased by 23%
- Country Living subscriptions grew by 62%, while Good Housekeeping saw a rise of 46% in subscriptions

CONTENT TRENDS FOR 2021

RECLAIMING THE HOME AS A SANCTUARY

So much has changed in how we live our lives, that our thirst for post-pandemic content that meets our current mindset and aspirations presents brands large and small with the opportunity to **win over new customers by delivering the right content at the right time.**

This isn't simply about pushing products. It's about connecting with their emotional journey, guiding them through the purchase funnel from awareness, to consideration and finally to sale.

What does your home need more of? Space to...

RELAX
+29%

WORKOUT
+21%

WORK
+19%

HAVE FUN
+17%

EDUCATE
+10%

Breaking down the home improvement tasks into how it will improve daily life - whether improving your working from home space, entertaining outdoors, working out or needing essential 'down time' space - means that content feels entirely 2021.



CONTENT TRENDS FOR 2021

REBALANCING RELATIONSHIPS

The past 12 months have been a pressure cooker for couples and families, with even the most rock solid relationships feeling the heat.

In December 2020, one of the UK's leading law firms Stewarts, revealed that it had logged a **122 per cent increase in divorce enquiries** between July and October 2020, compared with the same period last year. Meanwhile, Citizens Advice has also reported a spike in searches for online advice on ending a relationship.

Almost **half of respondents** in our survey (46%) indicated that the state of their home has a direct impact on the state of their relationship and home and interior brands have an opportunity to step in with content that can help meet this emotional need.

The satisfaction achieved from a job well done as a couple/family has an **immediate impact on how we feel** about our living space. This lift carries through the time we spend in the space together, creating new positive memory structures that brands can be a part of.

With lockdown easing, content that promotes a **shared challenge for couples** to tackle, ideas for injecting romance back into the home space and creating new spaces for alone time will resonate with different audiences.

HAS LOCKDOWN PUT A STRAIN ON YOUR DOMESTIC RELATIONSHIPS?

YES (28%) All Ages

YES (43%) 25-34 year olds



DOES THE STATE OF YOUR HOME IMPACT YOUR MENTAL HEALTH?

YES
53%

CONTENT TRENDS FOR 2021

ZOOM READY HOMES

Those hours of daily video calls, essential for work and socialising, have had a few noticeable side effects into other areas of life.

First, **more people have been looking into cosmetic procedures as a result of seeing themselves on screen** for hours a day every day. UK cosmetic surgery register Save Face reports 40 per cent more traffic to its website since the start of the pandemic. “'Lockdown Face' has become a thing,” says Ashton Collins, director of Save Face. “We were inundated with queries saying, ‘I’ve noticed that my frown line is terrible, that my lips need doing, or my nose is crooked.’”

Of course, **it’s not just our faces we’re seeing on screen, it’s also our homes.** Whether it’s a drinks catch up with friends, a quiz with family or a business meeting, our homes are a reflection of who we are.



MOVED
FURNITURE
+40%

BOUGHT
FURNITURE
+26%

MOVED
ORNAMENTS
+32%

DECORATED
+24%

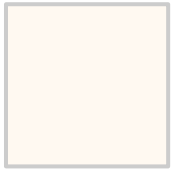
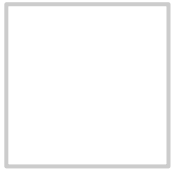
Over half of us make adjustments to our home before getting into a video call for work or play. This ongoing desire to curate the set for our lives daily, has brought the focus sharply on decorating and home improvement.

And all that time looking into each other's home has driven envy. In fact, 31% of people said that they coveted other people's homes during calls. And 39% of those went on to decorate their home, with a further 36% planning a decorating job.

Being Zoom ready offers a rich stream of content opportunities for brands to tap into that will resonate with audiences at different life stages, from advice about the impact of a background colour to give the required impression to the telltale signs to look for in the background when on a first date.

CONTENT TRENDS FOR 2021

The popularity of white reflects decorating trends, of course, but is there something more? In Summer 2020, Italian Vogue chose to print an entirely blank white front cover. Its reason? One that applies wholeheartedly to the psychological position society finds itself in now.



MORE POPULAR

LESS POPULAR

“

WHITE IS REBIRTH, THE LIGHT AFTER DARKNESS, THE SUM OF ALL COLOURS. WHITE IS THE COLOUR OF THE UNIFORMS WORN BY THOSE WHO PUT THEIR OWN LIVES ON THE LINE TO SAVE OURS. **IT REPRESENTS SPACE AND TIME TO THINK,** AS WELL AS TO STAY SILENT. WHITE IS FOR THOSE WHO ARE FILLING THIS EMPTY TIME AND SPACE WITH IDEAS, THOUGHTS, STORIES, LINES OF VERSE, MUSIC AND CARE FOR OTHERS.

”

ITALIAN VOGUE

CONTENT TRENDS FOR 2021

THE VALUE IN VALUES

56% of people say that the environmental or sustainable credentials of their home and interiors purchases are important.

For some of the new entrants to the homes and interiors sector, who embedded their environmental or sustainable credentials in their core business strategy, it can be easy to **tap into this growing customer mindset** and create content to reinforce it.

For older, more established brands, it can be harder to narrate how they make a difference. Often the good work they do beyond production or retail doesn't connect as simplistically to their proposition for the customer. It is often the result of a cause close to the heart of the people involved.

For these brands **it's time to find new ways to tell and share the values that the business has** and relate them back more closely to their core proposition in a compelling story that will take the audience on a journey. This might mean that a furniture store donates furniture along with money to help a local hospice or a paint company paints a mural on a children's hospital ward.



THE ROLE OF INFLUENCERS

51%

AGREE THAT SOCIAL MEDIA INFLUENCES THEIR PURCHASES

91%

OF MILLENNIALS TRUST ONLINE REVIEWS AS MUCH AS FAMILY AND FRIENDS

74%

PREFER TO SEE OTHER USERS 'REAL' PHOTOS AND VIDEO. 65% CLASS IT AS ESSENTIAL

The homes and interiors space has plenty of experts offering practical how to guidance and editorial commentary. However, **during lockdown there has been a boom in homes and interior influencers**, from novices to experts, all ready to share their experiences online.

Working with influencers can offer brands access to their community, increasingly brand reach and demonstrating relevance.

In 2021, the potential of influencer marketing extends way beyond the opportunity of brand advocacy and extends into partnering with influencers as:

CONTENT CREATORS

Creating authentic, relatable and highly engaging content banks for use across PR, social and marketing campaigns.

STORYTELLERS

Instilling brand trust by curating relatable human stories that put the influencers own brand experience at the heart of the narrative.

ACTION DRIVERS

By integrating clear calls to action in campaigns, the influencer contribution to directing web traffic, conversions, attendance, marketing sign-ups etc are all measurable.

SOCIAL STRATEGISTS

Advising brands on the type of content that performs well and when the target audience is most likely to be online to help inform content development in other places.

WATCH OUTS

The influencer marketing sector is still relatively new when compared to traditional PR. Due to many influencers acting as freelance content creators without any professional experience in digital marketing, this can lead to influencers and sometimes brands, missing the mark with campaigns which can result in negative commentary online.

LONGER TERM RELATIONSHIPS

With the above in mind, professional, full time influencers have begun to favour long term brand partnerships which allow them to build authentic relationships with brand names that align with their own interests and values (with a minimum of six month partnership duration).

Ongoing content partnerships allow brands to build credibility over time, in addition to increasing the likeliness of purchase intent due to increased audience exposure to brand and product key messages from an individual whose opinion is respected and sought after.

“ **56% OF BRANDS USE THE SAME INFLUENCERS ACROSS DIFFERENT CAMPAIGNS WITH THE MAJORITY PREFERRED TO BUILD LONG TERM RELATIONSHIPS WITH A SMALL COHORT, TO INCREASE PENETRATION OF KEY MESSAGES THROUGH REPEAT TARGETING OF AN AUDIENCE BASE.** ”

INFLUENCER MARKETING HUB DATA (2020)





BEWARE THE JOURNALIST TURNED INFLUENCER

Journalists are increasingly moving into the influencer space as digital content consumption is increasingly on the rise but also to build their own reputations. This alternative segment of influencers have very different expectations as to how brands should engage with them, holding brands to a higher standard than influencers without a journalistic background.

Former Rogue Traders and Professional Builder journalist Roger Bisby, has created Skill Builder, a YouTube hub packed with product reviews, news and guides targeted at professional trades, the self employed and DIYers with over 300k engaged subscribers.

Former Red journalist Alexandra Stedman is one of the many staffers who has emerged as a credible influencer with her blog and Instagram brand The Frugality.

CONSIDERATION DRIVERS

In addition to maximising the role of influencers as outlined above, brands are increasingly leveraging the power of influencer partnerships by utilising influencer content in sponsored ads to maximise the reach of not only their products but their association with key influencers who are highly regarded in their respective sectors.

Brands are cutting costs when it comes to inhouse content creation for social ads and instead repurposing that spend for influencer content permissions as this content is more authentic and human which is proving to be more relatable for consumers and in turn, more likely to result in conversions - proving a savvy business decision to merge influencer and social advertising strategies and utilising them both in the consumer purchase funnel.

“

THE ROLES OF INFLUENCERS ARE BECOMING INCREASINGLY IMPORTANT, PARTICULARLY THOSE OF EVERYDAY PEOPLE TAKING ON THE PROJECTS THAT MANY OF US ARE TEMPTED TO START. WHEN WE SEE SOMEONE WITH SKILLS NO GREATER THAN OUR OWN, TRANSFORMING THEIR HOMES AND LIVING SPACES, **WE CAN SEE WHAT IS GENUINELY ACHIEVABLE AND THE STEPS WE NEED TO TAKE MAKE IT HAPPEN.**

THE SMART BRANDS ARE FINDING THE INFLUENCERS WHO MATCH THEIR ETHOS AND APPROACH AND HAND IN HAND THEY ARE DELIVERING INSPIRATION, IDEAS AND HELP TO THOUSANDS OF CONSUMERS EVERYDAY.

STEVE COLLINGE, INSIGHT DIY

”

IN CONCLUSION

2021 stands to be another bumper year for homes and interior brands, but it's most certainly not business as usual. **There's work to be done and it starts NOW.**

Not only is the mindset of the consumer very different, but also the breadth of people undertaking DIY projects is far greater with young people and those renting their homes now fully invested in the benefits of home improvement. **How brands reach these emerging sectors and - crucially - how brands engage with these people will be critical to their success in 2021 and beyond.**

Tapping into the individuals and channels that provide influence is important, as is being able to inspire action through rich visual content that reflects current trends and aspirations in the home.

While this activity will largely be focused online given how long all of us spend on various devices daily - and here it is necessary to know the difference between a TikTok campaign and a Facebook one - the returning role of the physical store is fascinating.

No screen can replicate the experience of seeing a product up close and in person and the public's pent-up desire to get out into the real world again presents a massive opportunity to inspire in bricks and mortar stores that just a few short months ago were being written off as casualties of the pandemic.

The recovery from Covid will not be a straight path and some brands may well fall by the wayside during the big readjustment to whatever normal looks like in future. However, knowing your consumers, being where your audience is and creating content that inspires them to dream about, plan and execute a DIY project in their beloved home are great starting points to success.

We have a great track record in this space with household name brands. And **we're here to help.** Why not give Democracy a call now to see how we can give your brand a place in this new world?

JENNIFER O'GRADY, HEAD OF AGENCY

DEMOCRACYTM



CONTACT US

Our team of senior strategists are available by videolink to talk through your current situation, to offer insight and guidance, and to sense check your communications plan.

To arrange a **FREE** hour long consultation call, please contact either **Jennifer O'Grady** or **Caroline Aspinall**.



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