

Interesting types

The GfK concentrates on a purchaser-based view of the target groups for the FEDIYMA International Consumer Study

How high is the total consumer spend on DIY and garden products in a particular country? Where and how do customers do their

a position in a certain market, whether he is a dealer or a producer, puts a lot of thought into questions like these. Consequently,

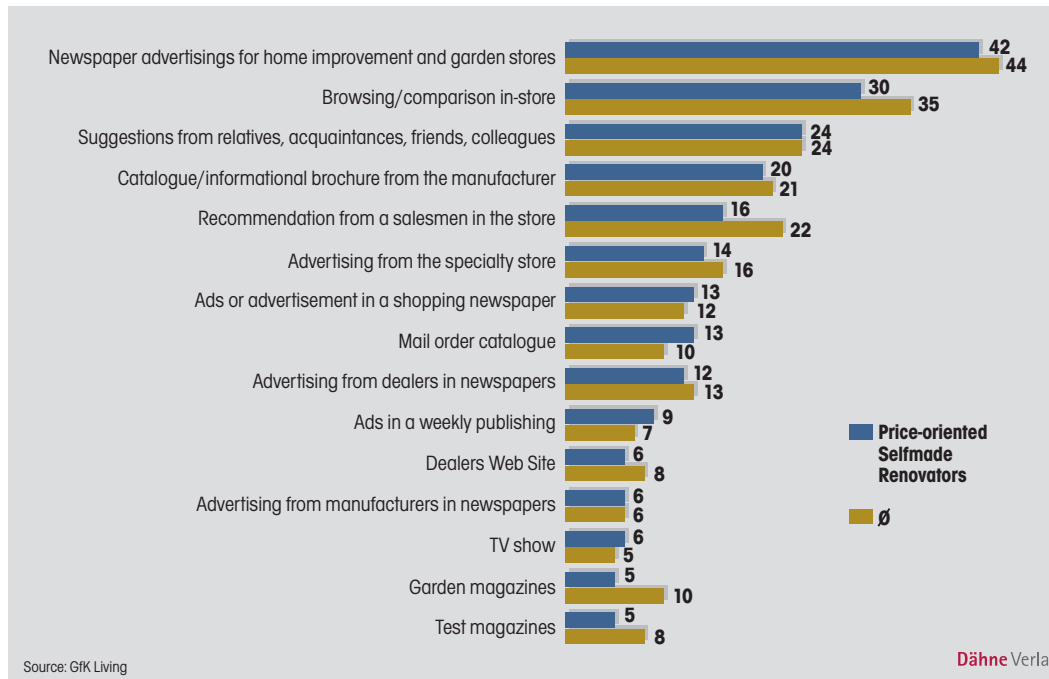
they investigated 13 European countries: Germany, United Kingdom, Spain, France, Bulgaria, Romania, Slovakia, Poland, Croatia, Ukraine, Czech Republic, Hungary and Russia. Which are not only the well-surveyed advanced countries but also extremely interesting markets in eastern Europe, about which very little reliable data was available up to then.

They start out from their own approach (GfK-Segmentation Plus) in order to define the target groups in such a way that the customers' decisions relevant to buying can be deduced from them. For the GfK doesn't simply stick with socio-demographic descriptions and classifications (eg, "Best Ager", "Middle Class" or the "Silver Generation"). Even the psychosociographic or lifestyle-oriented target group segmentation (eg, "Yuppies", "Lohas" or the "Establishment") is only part of their approach.

The international GfK House and Garden Monitor is centred rather on a purchaser-based segmentation which, as the name says, concerns itself with the purchase-relevant attitudes of potential customers to a particular subject.

One of the most important topics for the DIY market is people's attitudes to renovations. The GfK has segmented seven renovation types that are significant in east and west Europe and, on

Price-oriented Selfmade Renovators Information sources (in %)



shopping? How much do they spend? What is their attitude towards do-it-yourself? How do they live in general? How do they rate which brands? And can they find a commercial scenario that meets their requirements?

So far so good. Anyone who hopes to achieve or consolidate

so does the FEDIYMA International Consumer Study 2010, which was undertaken by the 'Living' section of the German GfK market research company and presented at the 1st European Home Improvement Forum in Vienna.

But less usual is the fact that GfK Living answers these questions in great detail. For example, the market researchers demonstrated this in their international House and Garden Monitor, where

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average, can be identified with a relatively similar percentage of between 13 and 16 per cent of the population: the price-oriented self-made renovator, the brand-oriented cocooner, the last-minute layman, the independent DIY potential, the brand-oriented hobby DIYer, the trend-oriented delegator and the pragmatic heavy DIYer.

Depending on how these types can be classified in relation to their practical capabilities, their interest in DIY and decorating, their attitude towards their home, and not least the frequency of their DIY activities, this results in a pretty accurate picture of the different types. And, above all, the manufacturer or retailer of DIY products has a description of potential target groups that is oriented towards implementation since it is oriented to purchase decisions.

What does this look like in practice? Let's take the price-oriented selfmade renovator as an example. The GfK describes him with the catchphrase: "If I could afford it I would not hesitate to call a professional craftsman."

However, catchphrases are by no means the end of the story – on the contrary, the analysis is very much in-depth. The socio-demographic description (age, sex, size of household, size of place of residence) is first related to the national average for the total population, as is the housing situation (owner-occupation/rental property, size of residence, type of construction, etc).

Then questions are asked for the different product categories about the use of individual products and brands as well as the

brand awareness of a whole list of manufacturers. Finally the survey participants make an assessment of their capabilities, express their attitude towards renovation work and name the sources where they obtain information for a purchase.

Since the survey is carried out identically in all the participating countries, the results can be compared with each other and conclusions can be reached. What comes out of this, however, is extremely different profiles. In Russia, for instance, the independent DIY potential is by a long way the leading renovating type with a share of 27 per cent, whereas in Germany this group is by far the smallest one.

But a glance at the distribution table shows that you certainly cannot equate the Russian market with the east European one overall. In the other countries of this region the independent DIY potential accounts for only a below-average share – while the United

Kingdom is the only west European country with a share in excess of 20 per cent.

The fact that the price-oriented selfmade renovator numbers among the smallest customer groupings throughout Europe with an average share of 13 per cent must surely be regarded as a welcome sign in general. Poland and Ukraine alone have somewhat higher percentages in this regard.

Although the international FEDIYMA Consumer Study 2010 by GfK is not a continuation of the Monitor, it does link up with the wording of its questions and goes into consumer behaviour in matters of DIY in great detail in six countries (United Kingdom, Germany, France, Belgium, Denmark and Spain). There is also the possibility of comparability with the FEDIYMA studies of 2005 and 2007, meaning that their findings can be arranged over time and result in coming to conclusions about trends. ■

Distribution of the GfK renovation types in Europe

