



the Pulse
Expectations. Prospects. Confidence.

Bathroom Trends Survey

December 8th 2022

A tracker of sales expectations, confidence & prospects
Plumbing & Heating Merchants & Retail Bathroom Specialists

Bathroom trends survey & Omnibus

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The Pulse, started in April 2019 is a monthly trends survey of builders' merchants' sales expectations, confidence and prospects.

Published in Professional Builders Merchant it is widely read and referred to.

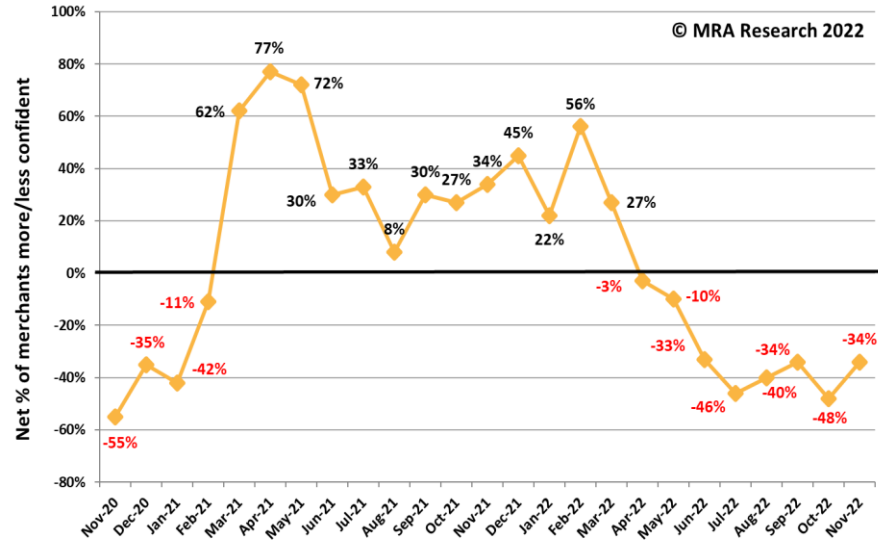
The aim of **The Bathroom Pulse** is to establish similar exposure and credibility in the Bathroom sector, tracking sales expectations, confidence and prospects among merchants and retail specialists. The survey was piloted in August and the first complete wave was completed in November 2022.

Having completed the pilot and first wave we are looking for a BMA member to sponsor **The Bathroom Pulse**

Alongside The Bathroom Pulse we're setting up a separate **Bathroom Omnibus Survey** for companies to buy their own questions for plumbing and heating merchants and retail bathroom specialists. Buying as few or as many questions as they need the **Bathroom Omnibus** is a quick & cost-effective insight tool for their marketing.

Tracking expectations, prospects & confidence

Confidence in the market: Year-on-Year
(Nov 2022 v Nov 2021)



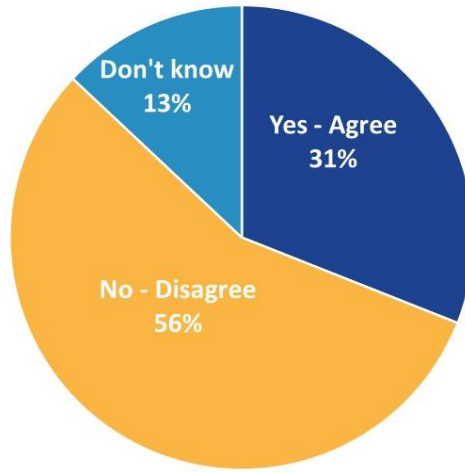
Net figure: The difference between the percentage of merchants more confident about market prospects and those less confident is the net figure, expressed as a percentage. A positive net percentage indicates more confidence, a negative indicates less confidence. Net zero implies neutral. For this chart, 19% of merchants interviewed are more confident against 53% who are less confident. The net figure is -34% less confident.

Two Omnibus questions we added for PBM

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Brighter days lie ahead

Liz Truss said 'brighter days lie ahead' after becoming UK's shortest-serving leader. Do you agree?



While one in three merchants (31%) agreed that brighter days lie ahead 56% were not optimistic.

Merchants in the South (59%) and Scotland (62%) were the least convinced.

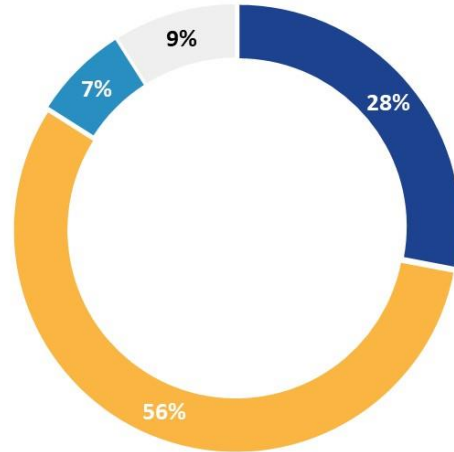
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Base: 100

And a 2nd question: Who is rooting for Rishi?

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On a score of 1-10 where 1 is no chance and 10 is a racing certainty, how do you rate the new Prime Minister Rishi Sunak's chances of fixing the UK economy?



■ No Chance 1 to 3 ■ 4 to 7 ■ 8 to 10 Racing Certainty ■ Unsure/Don't Know

Merchants weren't convinced the new Prime Minister could fix the UK economy, with **28%** saying 'no chance!'

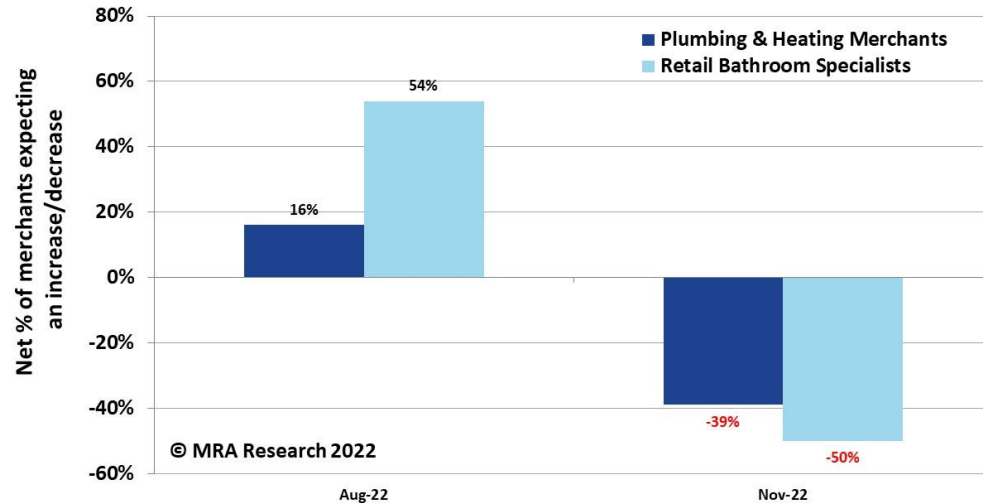
Merchants in Scotland were deeply skeptical with **50%** rating his chances as 1-3 out of ten (No chance!).

Monthly tracker: sample and quotas

100 CATI / Wave		
Plumbing & Heating Merchants Sourced from MRA's StockistBASE database.	50	Quotas by size, region & type
Kitchen & Bathroom Retail Specialists Sourced from MRA's Retail Specialists database.	50	Quotas by region

Sales expectations: Month-on-Month

Sales Expectations : Month-on-Month



In August sales expectations were up against July.

But compared with October, November's sales expectations dropped sharply.

Retail bathroom specialists had higher expectations than merchants in August but lower in November.

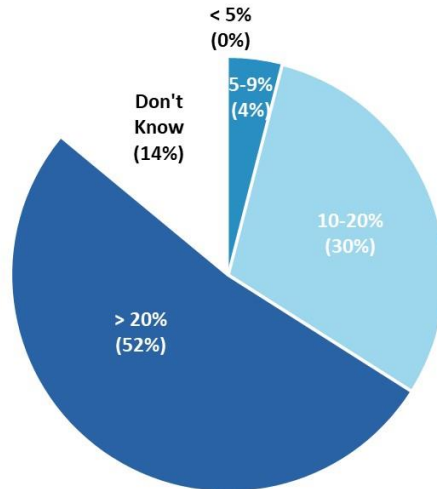
The North & Scotland were the least optimistic regions.

Net figure: The difference between the percentage of merchants more confident about market prospects and those less confident is the net figure, expressed as a percentage. A positive net percentage indicates more confidence, a negative indicates less confidence. Net zero implies neutral.

For this chart in November, 11% of merchants interviewed are more confident against 50% who are less confident. The net figure is -39% less confident. 0% of retail specialists interviewed are more confident against 50% who are less confident. The net figure is -50% less confident..

Sales expectations: how much of a swing?

Sales Expectations: % Decrease
Nov 2022 v Aug 2022

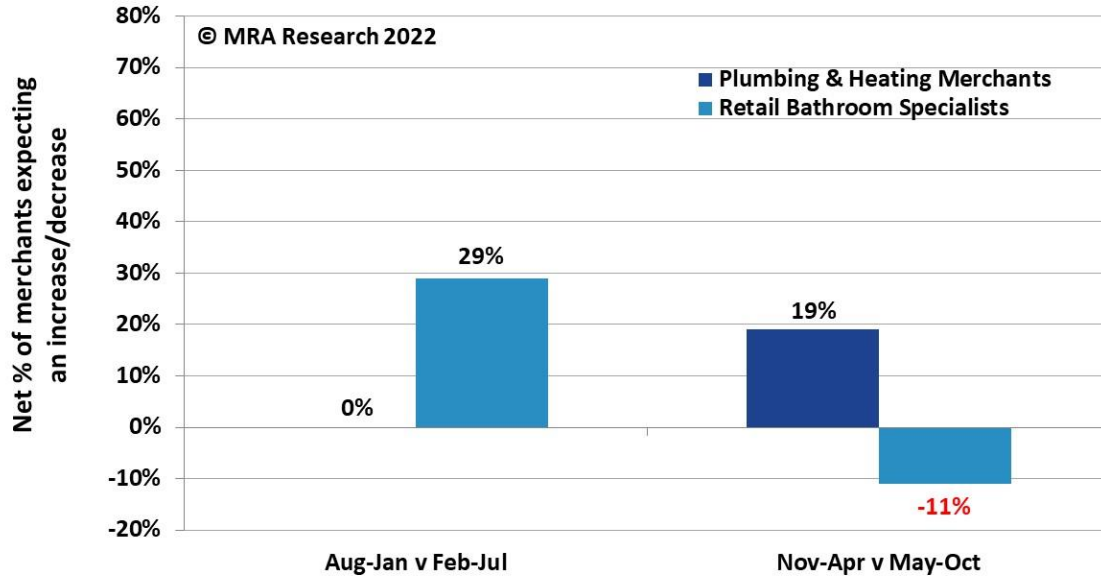


Most of those expecting sales to fall expected a big drop.

Over half expected sales to fall by more than 20%.

Sales expectations: the next six months

Sales Expectations
Next 6 months v Previous 6 months

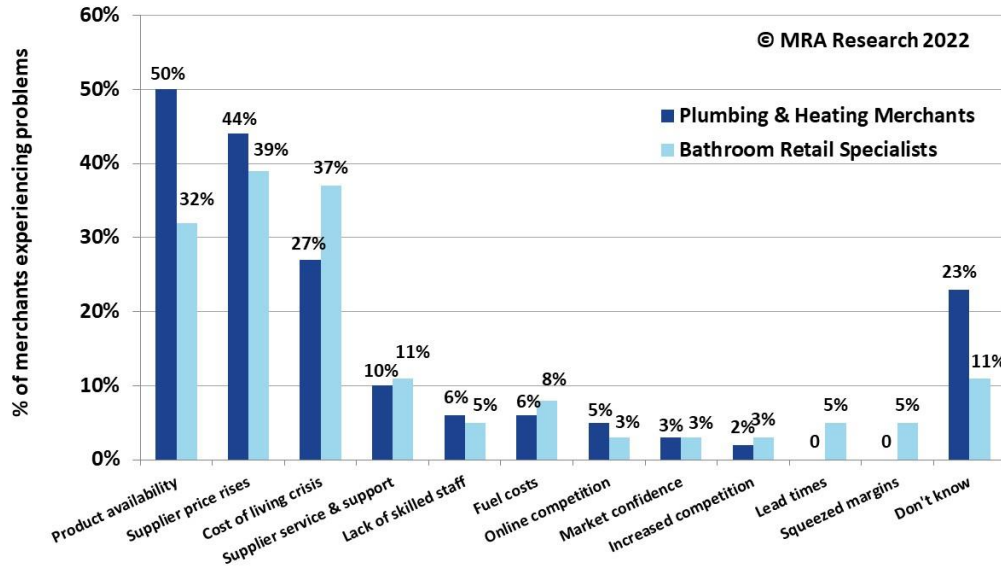


A net **-11%** of Retail specialists expected sales to decline.

A net **+19%** of Merchants expected sales growth.

Problems in the last month

Problems faced in the last month (Nov 2022)

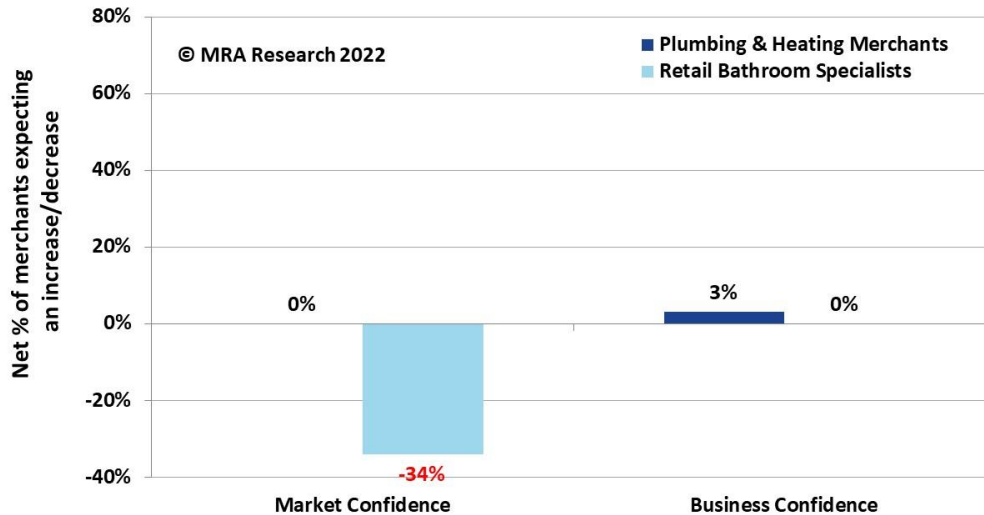


Product availability was a problem for 50% of Plumbing and Heating Merchants with 44% also complaining about supplier price rises

But Bathroom Retail Specialists suffered Supplier price rises (39%) and the Cost-of-living-crisis (37%)

Confidence in the Market versus Confidence in their own business

Confidence in the market V Own Business: Month-on-Month
(Nov 2022)



Retail Bathroom Specialists were far less confident in the market (-34%) than Plumbing & Heating Merchants.

Merchants were a little more confident about the prospects for their own business.

But as many Retail Specialists were confident in the prospects for their own business as those who were not.

Verbatim responses

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“I've seen a slow up, we do supply and fit and the fitting market is going down, I'm getting less and less footfall through the door”

Retail Specialist

“All the uncertainty with interest rates and everything. You don't know where you're going to be, and customers don't know where they're going to be with mortgage repayments etc. so home improvements go on the back burner”

Merchant

“I think its not the market, it is the things affecting the market such as interest rates, fuel, electric and gas. In the heating industry a lot of our appliances are gas, and we are being affected because of the high prices”

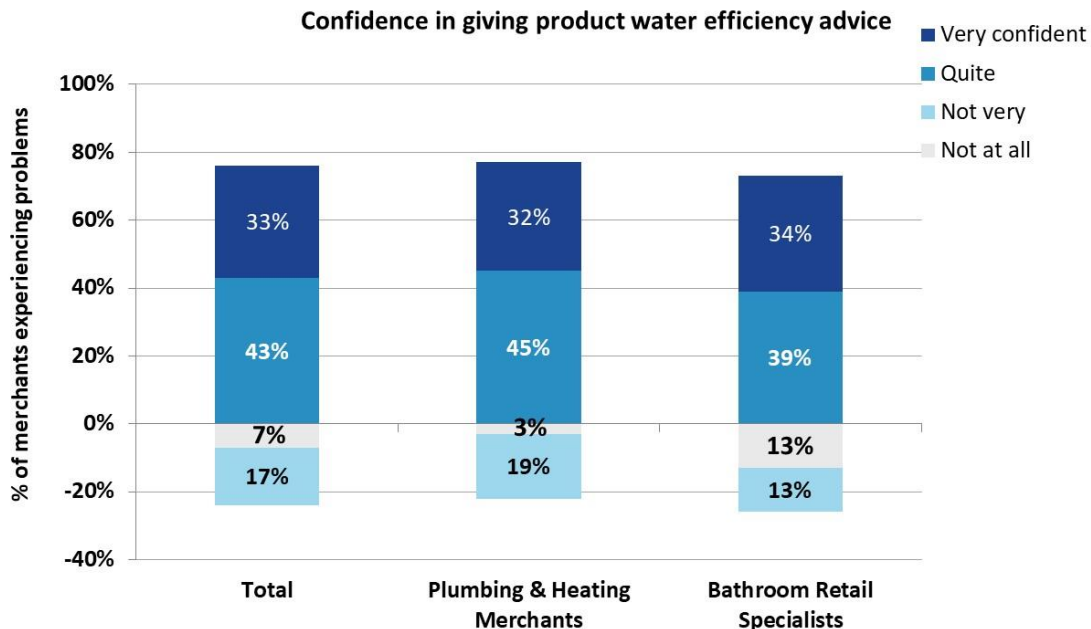
Merchant

“Just everything going on, we're seeing it slow down last week or so. Usually, it slows down in December, but I have seen it slow down in the last few weeks ...That's probably to do with everything going on at the moment politics wise, it's out of our control” Retail Specialist

Depending on interest in the topic some follow up depth interviews can be used to explore specific issues and provide rich, descriptive insight for must-read editorial coverage



Confidence in giving water efficiency advice



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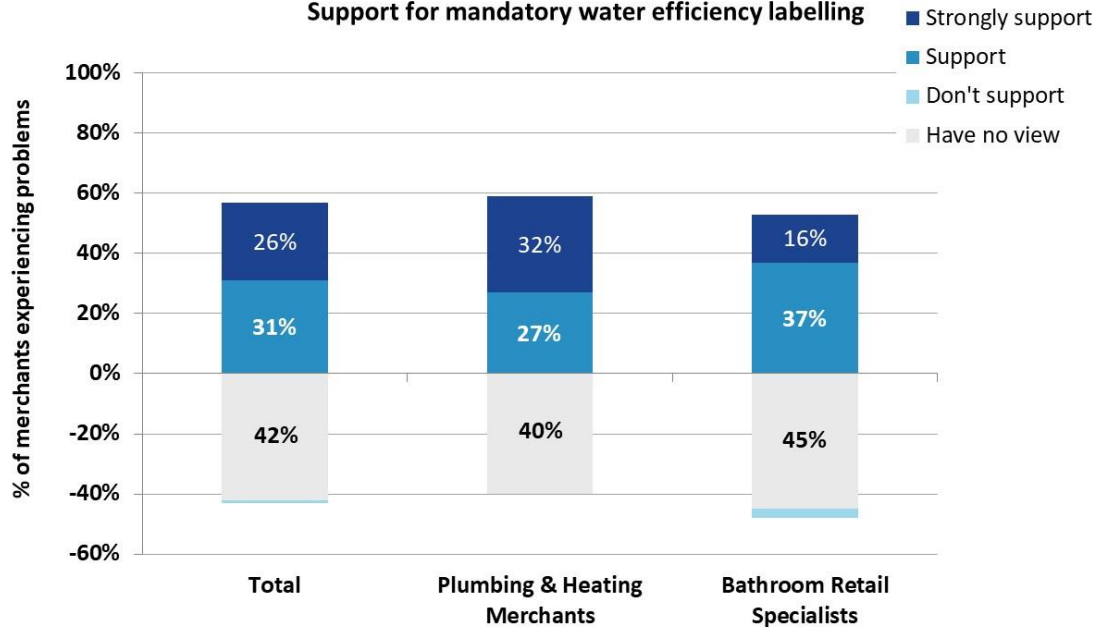
We added three Omnibus questions for the BMA

Overall, 1 in 3 say they are very confident advising on water efficiency.

Merchants are a little more confident (77%) than Retail Bathroom Specialists (73%)

But in total, nearly 1 in 4 (24%) are not confident in advising customers on water efficiency

Support for mandatory water efficiency labelling

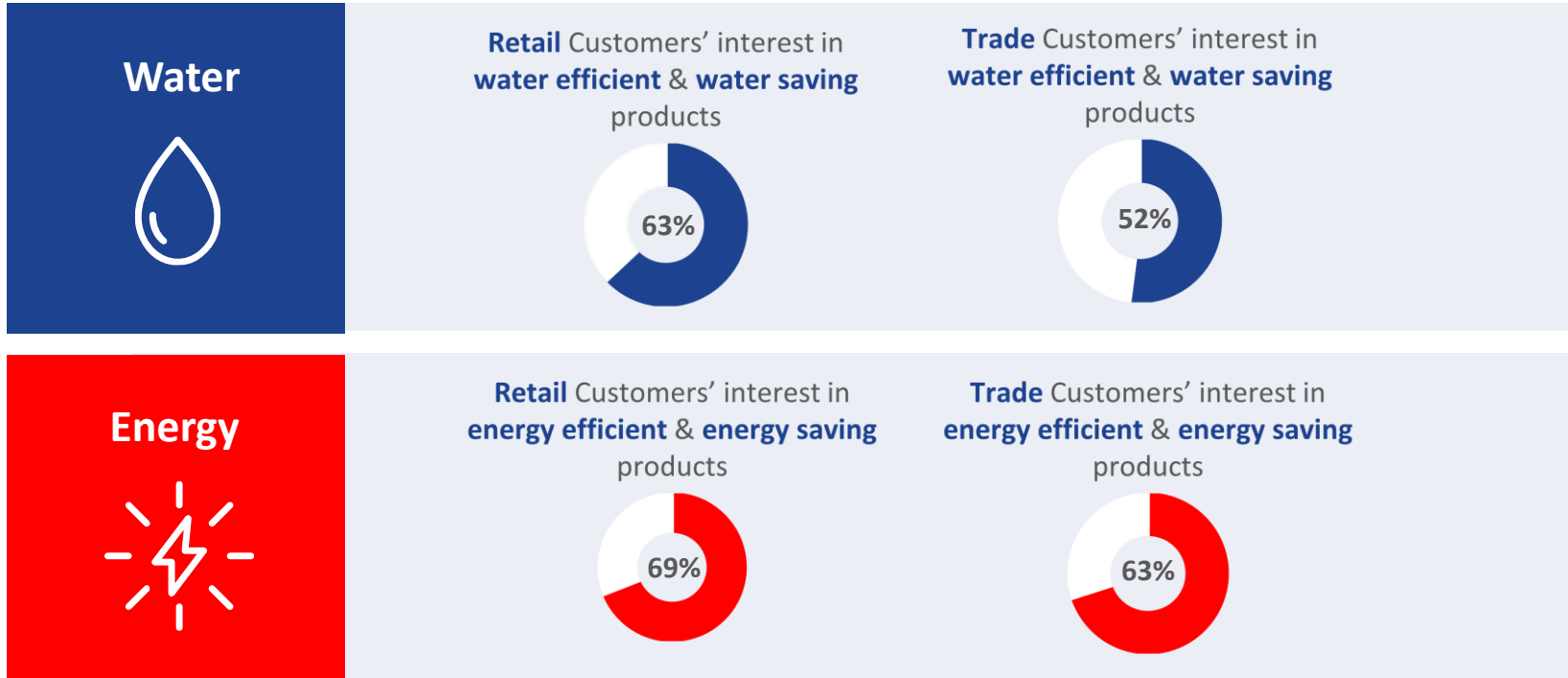


The majority (57%) support mandatory water efficiency labelling

Plumbing & Heating Merchants are more likely to strongly support labelling (32%) than Retail Specialists (16%)

Customer interest in energy/water saving products

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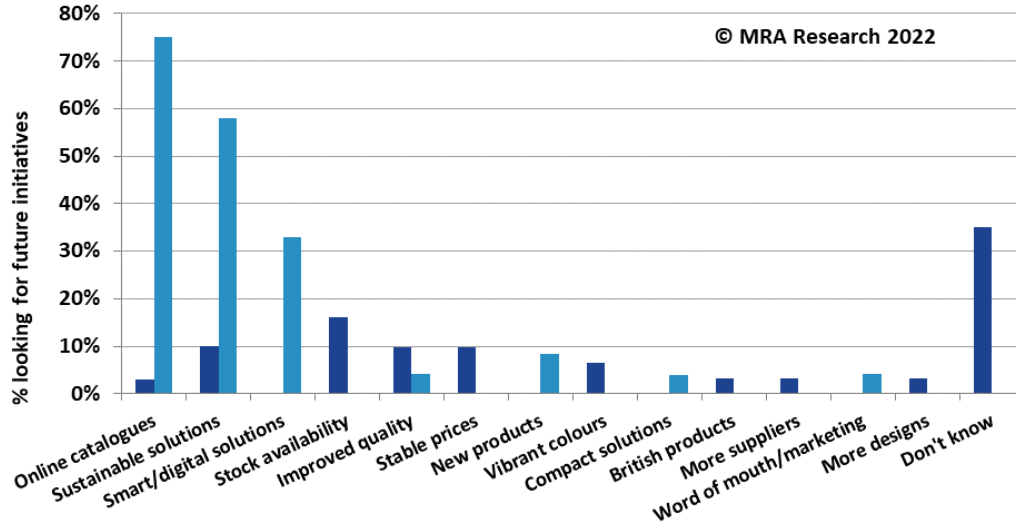


What do stockists want?

Desired Initiatives

- Plumbing & Heating Merchants
- Bathroom Retail Specialists

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Retail Specialists want online catalogues and digital solutions and sustainable solutions

Plumbing & Heating Merchants are more interested in product and operations – and perhaps they're under less pressure than Retail Specialists to provide digital and sustainable solutions

The Bathroom trends survey & Omnibus

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- **Interested in sponsoring The Bathroom Pulse?**

Want to know more? Email yvette@mra-research.co.uk or 07918 272936

- **Interested in adding your own questions to the Bathroom Omnibus Survey for plumbing and heating merchants and/or retail bathroom specialists?** For one or more months? Or tracking a particular issue or topic? For a minimum of two questions or as many questions as you need?

The Bathroom Omnibus is a quick, flexible, for your eyes only, cost-effective insight tool for your marketing.

Want to know more? Email yvette@mra-research.co.uk or 07918 272936

About MRA

MRA Research

MRA Research is one of the UK's longest standing research and insight companies solely serving construction, building materials and home improvement markets. Services include customer satisfaction surveys, brand mapping & positioning, competitive advantage surveys & competitor reviews, new product development & concept testing, advertising & messaging research, product usage surveys, decision maker research and market tracking.

In 2015, MRA set up the award-winning **Builders Merchant Building Index (BMBI)** in partnership with GfK and the Builders Merchants Federation. Monthly reports plus full quarterly reports with commentary by BMBI Experts – explanation and comments by industry leading brands speaking for their markets – are produced by MRA Research. Annual Round Tables, organised and produced by MRA Research, debate key industry issues, opportunities and trends. For the latest reports, Expert comments and Round Table videos, visit www.bmbi.co.uk.



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 Agency of the Year 2004



“It’s great what you are doing with The Pulse. It is an outstanding, must read, for all in the building materials market from a first class research & marketing agency. I’ve always been a fan of top quality market research and currently it’s moved beyond vital to critical. It’s £000s of great value for free.”

Paul Hetherington, Hetherington International Services Ltd



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