

Understanding the Bathroom Installer

Key Insights 2023

In partnership with

Eureka!
ILLUMINATING RESEARCH

Research by the industry, for the industry

The Bathroom Manufacturers Association is the trade body for all manufacturing businesses supplying the UK bathroom market, acting as an information highway between industry, government and the consumer on all issues that affect the bathroom business in the UK.



Eureka! Research is an independent market research agency formed in 2016. In seven short years they have carved out a strong reputation for delivering robust, sector-leading insight with tradespeople, retailers and other professionals in the UK construction and building products sector.



Made possible by industry supporters



Introduction

Over the past few years, the Bathroom Manufacturers Association (BMA) has been dedicated to delivering valuable insights to its members. This commitment has materialised in various forms, including our quarterly publication, BMA Insights, which combines policy analysis and economic data in a single resource. Additionally, we have been collecting monthly turnover data to assist members in benchmarking themselves against the broader market. In the coming months, we will provide information on the state of the channels to support our members further.

Last year, we conducted exclusive research involving 500 consumers who had recently purchased bathrooms. The goal was to gain a deeper understanding of their purchasing trends and behaviours. The research, led by Jane Blakeborough from Trend Monitor, proved immensely popular among BMA members who highly valued the insights generated through the survey. Notably, some of the most surprising statistics revolved around the significant influence of installers in the purchasing cycle, prompting us to focus our subsequent study on this crucial group.

I am delighted to announce that Jane has joined the BMA secretariat team this year to manage our research projects on an ongoing basis. "Understanding the Installer" is the first project we have conducted in-house, with the support of Eureka Research. When we initiated this project, we set an ambitious target for the survey's sample size, as we aimed for the data to truly represent the marketplace. Engaging tradespeople, who are notoriously busy, posed a challenge, but we were determined to speak to 500 of them.

We extend our sincere gratitude to our members for their generous support in creating a prize fund that incentivised respondents to participate in our survey. Through your contributions, we surpassed our initial target of 500 installers and gathered data from nearly 700 professionals, exceeding our expectations and enhancing the statistical significance of our findings. We owe our success to the brands listed in this document, and we sincerely thank them for their support.

I trust that you will find the results of this study as genuinely fascinating as I do. Installers will continue to be a pivotal stakeholder group for manufacturers, if not the most important, for the foreseeable future. If this research helps BMA member brands establish closer relationships with installers, it will have achieved its primary mission. We hope you enjoyed reading this report.



Tom Reynolds,
CEO Bathroom Manufacturers Association

Contents

01
RESEARCH OVERVIEW

02
METHODOLOGY

03
A TYPICAL UK INSTALLER

04
FINDING INSTALLATION WORK

05
DESIGNING THE BATHROOM

06
PRODUCT SUPPLY AND FIT

07
ADVISING HOMEOWNERS

08
RECOMMENDING A PRODUCT

09
RECOMMENDING A RETAILER

10
ATTITUDES TO WATER-EFFICIENT PRODUCTS

11
TRYING NEW PRODUCTS



Research Overview

The most exciting research studies are those that throw up outliers in the data, those spikes in the charts that make you want to dig deeper and understand more.

The Bathroom Consumer Purchasing Trends survey run by the BMA and Trend-Monitor back in 2022 gave us one of those outliers right at the end of the study - when the final question highlighted the high level of influence the bathroom installer had on consumer choice of bathroom products.

This was a data spike that couldn't be ignored. When we dug deeper to look at the role of the installer throughout the whole bathroom purchasing journey, we found that they were influential at every stage, from designing and planning the bathroom space, to advising on product selection, to recommending which retailer to buy the products from.

However, although identifying these interesting pieces of information was a significant breakthrough, it was equally important to put this information into context. Alongside our research partner Eureka! Research, we set out to investigate what installers themselves thought about their role in the bathroom purchasing journey.

This report documents the installer's side of the story; where they think their influence lies, why they recommend products and retailers, the kind of advice they give, how they engage with manufacturers, what makes them try out new products, and much more.

It has undoubtedly been an exciting research project to implement and manage, not just because of the insights it has generated for our members. BMA members and affiliates, trade associations, and the trade press all played a vital role in ensuring the success of this project, and it has shown what can be achieved when the industry takes a collaborative and multi-resourced approach.

 According to homeowners who had recently installed a new bathroom

16% thought that the advice of the fitter was the most useful research method

28% had their bathroom planned by their bathroom fitter

16% relied on their bathroom installer to supply all of the products for their new bathroom

25% chose a retailer because it was recommended by their installer

40% stated that the bathroom installer had the greatest influence over their choice of product



Jane Blakeborough
Research Manager
Bathroom Manufacturers Association

Methodology

Eureka! Research was set up to deliver higher quality – more real world - research and insight into the trade sector, so we were delighted to partner with the BMA to deliver this important consultation. For too long, tradespeople have been viewed as one homogenous group, under-researched and often misunderstood, so we warmly welcome the energy that has gone into this timely campaign on behalf of BMA members.

Helped by some generous prize donations, we collected responses from 678 installers who kindly gave us their time. That's an impressive total that was boosted by the range of partners who actively supported the exercise. This has enabled us to capture insights from all corners of the UK trade community; we can therefore have confidence that this research is both robust and representative of all those actively working in the bathroom installation space.



Dave Ruston
Director/Co-owner
Eureka! Research
www.eureka-research.co.uk

Survey Respondents

To be eligible for the survey, installers had to be undertaking bathroom work in domestic UK properties and have responsibility for recommending or purchasing products for jobs.

Responses were collected using an online methodology between 26th April and 31st May 2023. The average survey length was 12.5 minutes, illustrating the depth of feedback collected.

678
completed surveys,
via a range of partner
installer databases

Manufacturers
37%

Eureka!
Trade
community &
GasApp
37%

Trade
affiliate
bodies
19%

Trade
Press
6%

A Typical UK Bathroom Installer

The UK installer profession supports a diverse and varied body of trades people who fulfil an integral role within the bathroom sector. This research set out to find the similarities and the disparities in working practices across the profession. Here are a few of the headlines

A typical bathroom installer



Spends over half their time installing new bathroom products, alongside other plumbing activities

Completes 13 full bathroom refurbishments a year

Is 50 years old

Is supplying products to two-thirds of their customers, as well as fitting them

Plays a critical role in bathroom design and advice

Has a significant influence over product choice

Directs homeowners to retailers that will provide a great customer experience

Finding Installation Work

Bathroom installers are finding business from different sources, via retailers and merchants, other trades and online trade directories, but mainly directly from the homeowners themselves

Consumer research by the BMA and Trend-Monitor¹ has already indicated that half of all bathroom installers are chosen by the homeowner either following a recommendation from a family member, friend or colleague, or the homeowner had previously used an installer. This new research shows that almost half of all bathroom installation jobs (48%) originate directly from homeowners via a phone call, email, website contact form or social media message

Recommendation from a local bathroom retail outlet is another major source of business. Over a fifth (22%) of jobs come from homeowners via recommendations from showrooms, illustrating the continued importance of this channel. This

can increase to 65% of jobs for those installers with a reciprocal arrangement between themselves and the retailer, with the installer recommending the outlet to homeowners to purchase bathroom products.

Those installers regularly fitting bathroom products benefit from recommendations via retail showrooms and merchants, as well as from builders and other trades. Installers who are fitting fewer bathrooms are finding it harder to generate work from recommendations and rely more on direct contact with homeowners.



Research Fact

Installer age-group 34 and under are twice as likely to source work via an online trade directory than the 55+ age group

1. The Bathroom Consumer in 2022, Understanding New Consumer Purchasing Trends for Bathrooms. Research by the BMA and Trend-Monitor

Designing the Bathroom

When having a new bathroom fitted, designing the bathroom space came top on the list of areas the homeowner struggles with, and the installer is very often the person who steps in to help

With a quarter of installers designing all the complete bathrooms they install, and 70% designing at least half of the complete bathrooms they install, it is clear that the installer plays an important role in deciding how our bathrooms will look and feel.

Consumer research indicates that 45% of new bathroom installations are either designed by the homeowner or keep the same layout. Only 27% are planned by a professional designer¹



Research Fact

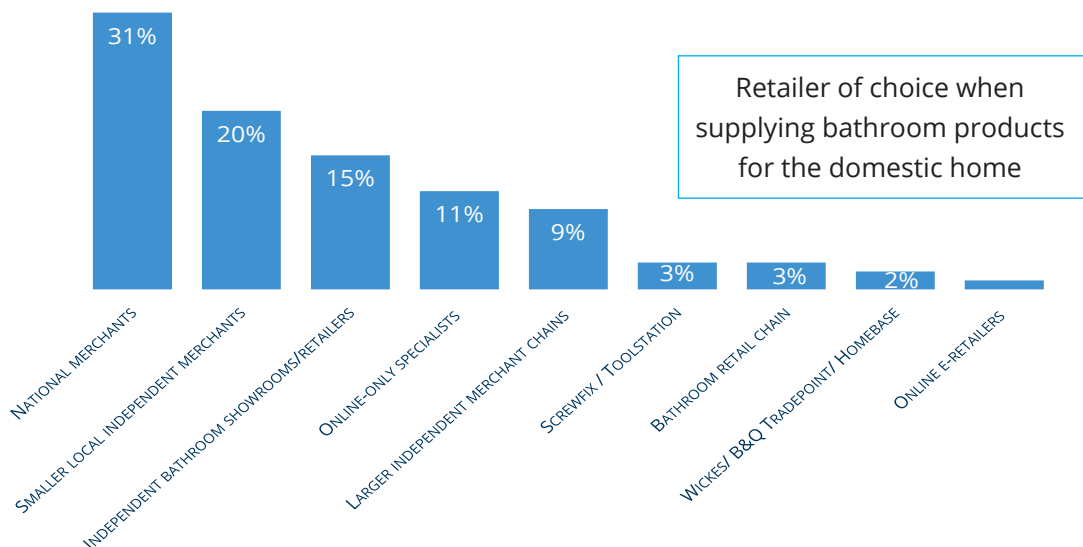
Only 3% of bathroom installers say they don't get involved in the design any of the bathrooms they install



The importance of good design is often underestimated by homeowners until it's too late. This results in 15% of new bathrooms having a 'disappointing' element to them that can be attributed to poor design¹

Product Supply and Fit

The average installer is asked to supply and fit on about two-thirds of the bathrooms they fit, and this is all to the advantage of the national merchants



National merchants are the store of choice for almost a third of installers who supply and fit products for their customers. Still, it is the independent sector that is the most crucial channel to installers overall with 44% of installers saying this is their preferred choice.

Although ecommerce has been growing for several years, just 13% of installers say this is their preferred channel overall. 11% will buy from an online-only specialist, but only 1% say they prefer a general online e-tailer such as Amazon. Price is the main reason installers choose online over a 'bricks and mortar' outlet.

There are many different factors influencing the installer's choice of retailer. However, top of the list is the social interaction these retailers provide and '*a good relationship with staff and sociability*' was the main reason our installers chose a particular retail outlet over another (53%).

This is particularly relevant in the case of the small local independent merchants where staff knowledge and advice is also an important factor. This type of merchant is also the most likely to recommend an installer to a customer, which gives another reason for an installer to be loyal to a particular outlet.

The service factors - aftersales, ease of returns and good credit limit and discount - are all rated higher by installers than product factors such as brands stocked and product availability

Advising Homeowners

Installer advice is being sought by homeowners across all bathroom product types, with showering being the category that homeowners are asking their installer about the most.

95%

of bathroom installers say that their customers are 'very likely' or 'quite likely' to ask for advice on shower screens and trays. Closely followed by shower controls

Brassware is also an important topic of advice, with 90% of installers saying they are very likely to be asked about taps.

Smart toilets, wet-room systems and wall-hung furniture are the least likely categories for homeowners to ask for advice on. 37% say they rarely or never get asked about smart toilets, illustrating the relatively low salience of this category in the UK still.

37% of installers have a 'hands-off' relationship with wet room systems, either saying they don't fit them, or rarely/never get asked for advice about them. This again illustrates a strong area of growth potential in the market.

Installers regularly fitting bathroom products are more open to giving advice and indicate that homeowners are 'very likely' or 'quite likely' to ask about most categories over 90% of the time.

Those installers who are not regularly installing bathrooms appear more reluctant to give advice to homeowners.



Recommending a Product

A product doesn't need to be quick to install for installers to recommend it to their customers, but it does need to be a product that falls into the 'fit and forget' category

As well as asking for advice across the different product categories, homeowners are also actively seeking the installer's advice on finding products at the right price or within their budget. In fact, 23% of installers indicated that this was the area that homeowners needed the most help with. However, installers rarely recommend the *cheapest available product*, preferring to recommend a product that is perceived as *'good value for money'*.



33%

Previous experience in fitting a product is the main reason an installer would recommend a product to a customer

17%

Of installers will recommend a 'fit and forget' product to their customers

A product that fits with the 'overall style' the customer is trying to achieve will encourage installer recommendation, especially if it is manufactured by a brand with a good reputation for customer service. However, *'contemporary or latest design'* comes low down on the list of reasons to recommend a product

Only 3% of installers refrain from recommending specific products to their customers.

Recommending a Retailer

Retailers with a good range of products and a great showroom will get the installers recommendation, especially if they carry good stock levels

Overall, retailer recommendations often prioritise customer convenience over the needs of the installer. A third of installers (33%) will recommend a retailer because they have a good range of products to choose from, and 13% put a 'great showroom' at the top of their list for recommending a retailer. This may mean that the installer themselves could miss out on the best trade discount or may have to fit a brand they are not familiar with. This is particularly the case for sole-trader installers.

Those installers that are directors of limited companies appear to be rather more commercially driven and place '*offers a good trade discount to me when a customer orders from them*' higher up in the reasons for recommending a retail outlet.

11%

Will recommend a retail outlet because they stock the brands the installer likes to fit

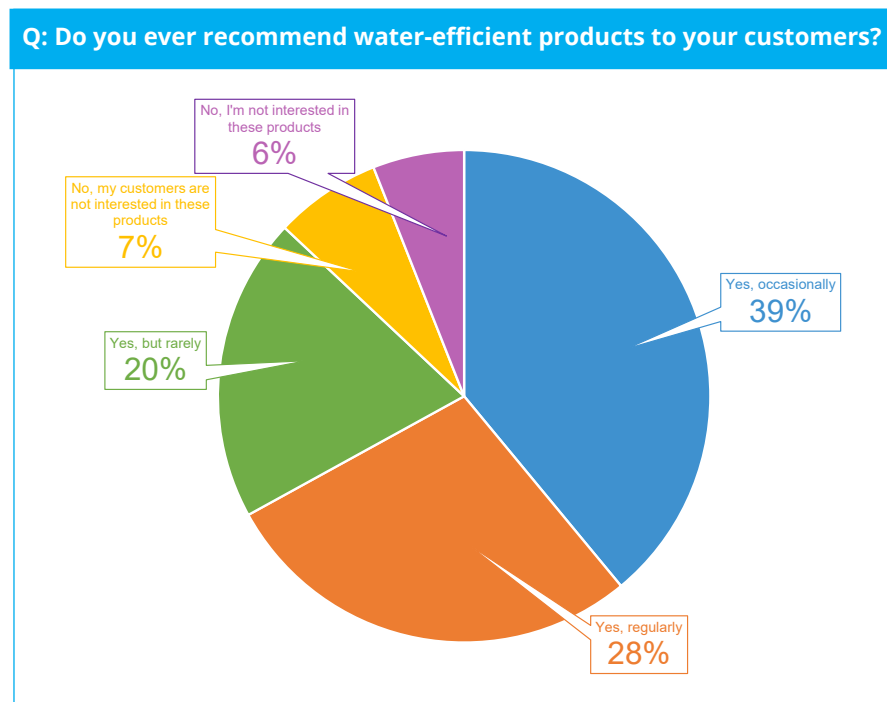
10%

Will recommend a retail outlet because they are a local business



Attitudes to Water-Efficient Products

Although over a quarter of installers (28%) are regularly recommending water-efficient products to their customers, 13% say there is no interest in this type of product, from either themselves or their customers



The 34 and under age group tend to recommend water-efficient products more regularly and claim to be more interested in these products themselves. However, they are more likely to say that their customers are not interested.



Research Fact

Raised consumer awareness of the benefits and increased consumer demand are required for installers to start recommending more water-efficient products

54%

Highlighted a lack of information about cost and water savings benefits

34%

Would like a better user experience in water-saving products e.g. flush and shower force

17%

Would be encouraged to try a new product if it was water-efficient

Trying New Products

Brand familiarity and peer recommendation is the key to encouraging installers to try new products, even better if the product is easy to install or an upgrade to a current product

44%

Would have the confidence to try a new product if it was recommended by a retailer, merchant or fellow trade

41%

Would have the confidence to try a new product if it is easy to install


39%

Would have the confidence to try a new product if it was a brand they knew

When it comes to learning about new products, this is led by the merchants and half of the installers like to learn about new products from the counter staff. Reps or promotions in merchants are also popular ways to learn about new products (33%), along with posters and leaflets in the merchants (21%).

Tradespeople communities such as Facebook groups, GasApp or PlumbApp are used by 33% of installers as a way of learning about new product. These have a greater appeal than social media 'fun' accounts (e.g. On the Tools).

The trade press (29%), shows and exhibitions (28%) and printed brochures (29%) all have their place when installers want to learn about new products.



The Bathroom Manufacturers Association publishes this report and no part of the contents may be represented as anything other than material owned and published by the association. BMA members may access the full findings from the research via the BMA members online portal

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