
IAB

Digital Influence on Home Improvement Plans

With a Section on Hispanic Consumers Planning Home Improvement

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Methodology

IAB conducted a custom analysis of syndicated Prosper Insight data to look at consumer and media behaviors of Home Renovators, defined as Adults 18 or over who answered yes to the following question: “Do you plan to make any of the following major (big dollar) purchases within the next 6 months? (Major Home Improvement or Repair)” Home Renovators were compared to the general Adult 18 and over population in the US. In addition, a section on Hispanic Consumers Planning Home Improvement was added in which the same group is subsegmented by those who answered “Yes” to “Are you of Hispanic, Latino or Spanish origin?” The report is derived from the Prosper Insights & Analytics Monthly Consumer Study (June 2015) of 6087 respondents surveyed online which focused on those planning to do a major home improvement or repair in the next 6 months and the annual 2015 Media Behaviors & Influence™ (MBI) Study of 16,228 respondents surveyed online. The studies have a margin of error of 1%, at a 99% confidence level.

Sample Sizes

- **Prosper Insights & Analytics Annual Media Behaviors & Influence™ (MBI) Study**
 - **16,228 Adults 18+** representative of the general US population
 - **2613 Hispanic Adults 18+** representative of the general Hispanic US 18+ population
- **Prosper Insights & Analytics Monthly Consumer Survey** conducted online in June 2015 and included Home Renovators
 - **6087 Adults 18+** representative of the general US 18+ population
 - **750 Hispanic Adults 18+** representative of the general Hispanic US 18+ population

About Prosper Insight™

Prosper Insight delivers customized timely market intelligence from various sources through its cloud-based technology-driven Integrated Solutions Platform. Solutions are delivered on multiple devices (PC/Tablet/Smartphone) through the InsightCenter™ tool using diverse information sources relevant to clients’ business needs. www.GoProsper.com.

Summary and Implications

9% of US adults are currently planning to do a major home repair or renovation in the next 6 months. They tend to be married, professional, educated homeowners between the ages of 35-64 who tend to earn more than average. Men and women are equally likely to be planning a home renovation. They skew older and they are tech savvy: Home renovators are more likely to own and use digital and mobile media and tend to use it for home related purchases.

68% of US adults believe that an area of their home is in need of a makeover, providing a pool of potential future home renovators. What sets them apart? Those who are currently planning a home renovation report that they are financially better off and more secure in their jobs than they were a year ago. Notably, 38% of them put off their home improvement project in the past month, as has 20% of the general population. A boost in consumer confidence can push those in need of a home improvement into actively planning their project.

Why are they important to marketers? Not only are they planning to spend on a major home renovation, but even when they're not in the middle of a project, home renovators typically spend more than the general population on hardware. They also generally spend more on home related products: Lawn & Garden, Appliances, Home Décor, Furniture. Home renovators also report plans to spend even more than usual on these items over the next 3 months.

It's not just home related items. While home renovators are planning to spend more on their home improvement projects and products related to the home, they also are more likely than the general population to have major purchases planned: House (8% vs. 5% A18+), Car (23% vs. 14% A18+), TV (12% vs. 9% A18+), Computer (19% vs. 14% A18+), Boat (4% vs. 1% A18+). And after completing that home renovation project, 27% will need a Vacation (vs. 19% of US adults 18+).

Summary and Implications

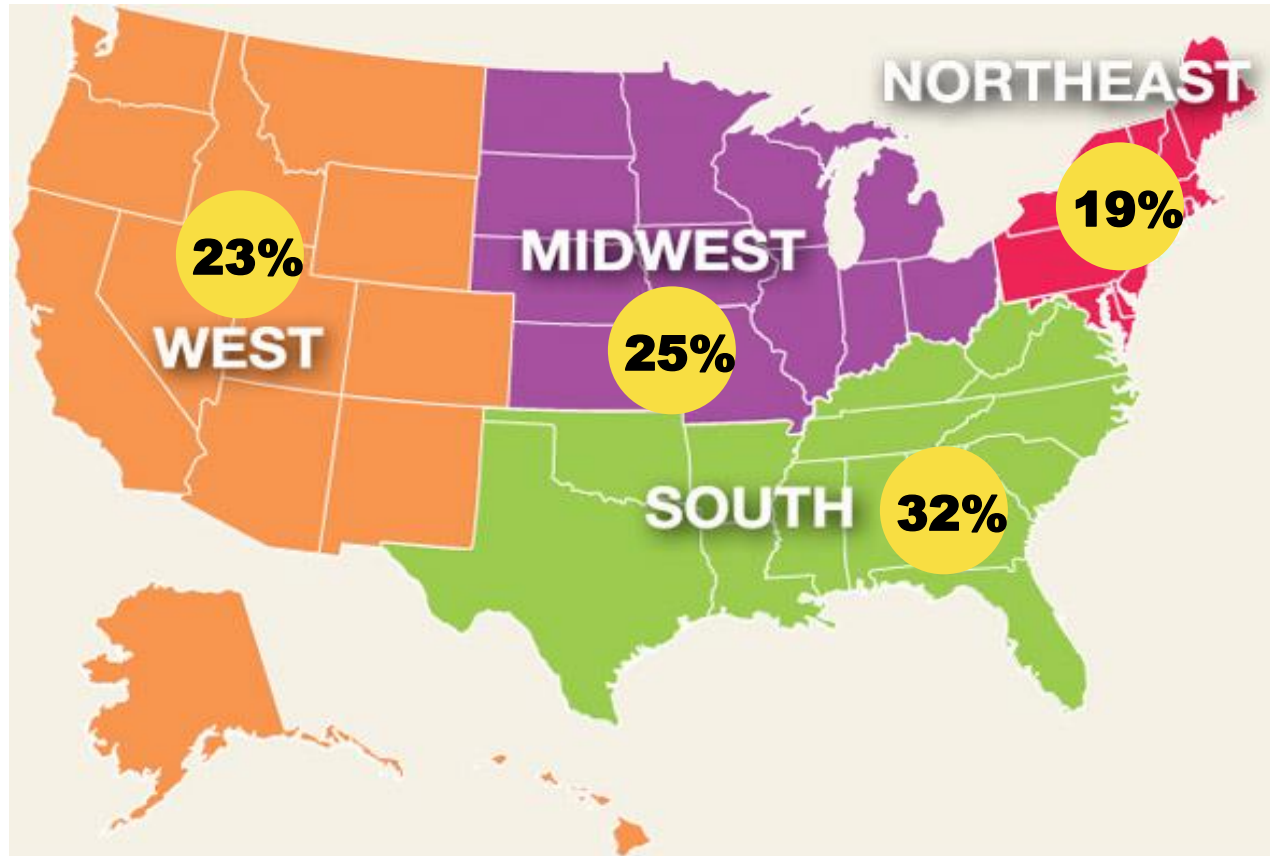
Most are planning a kitchen renovation, followed by bathroom and outdoor space.

Where do they get home improvement ideas? Magazines are the #1 source of inspiration (45%), except for Southerners who get their renovation ideas primarily from online search (47%). In store browsing is the #2 source of project inspiration (41%), followed closely by online search (40%). 19% check social media for ideas.

Those planning a home renovation are more mobile and digital savvy. Home renovators, whose age range tends to be 35-64, are more likely to own and use mobile devices despite being older than the typically digital- and mobile-forward youth: 88% own a smartphone or tablet vs. 83% of US Adults over 18. They're more likely than the general population to do a number of digital and mobile activities regularly: Stream Digital Video (65% vs. 55% A18+), stream Mobile Video (51% vs. 41% A18+), use a ConnectedTV (35% vs. 25% A18+), use Daily Deal sites (62% vs. 48% A18+), read product reviews while in the store (64% vs. 54% A18+).

9% of Americans are Planning a Home Improvement Project

Do you plan to make any of the following major (big dollar) purchases within the next 6 months? (Major Home Improvement or Repair)



Those who are planning a home improvement are distributed regionally across the US in proportion to the US population (US population over 18: Northeast 19%, Midwest 23%, South 34%, West 23%)

9%
of US Adults Are
Planning
Major Home
Improvements
or Repairs

And they live in the...

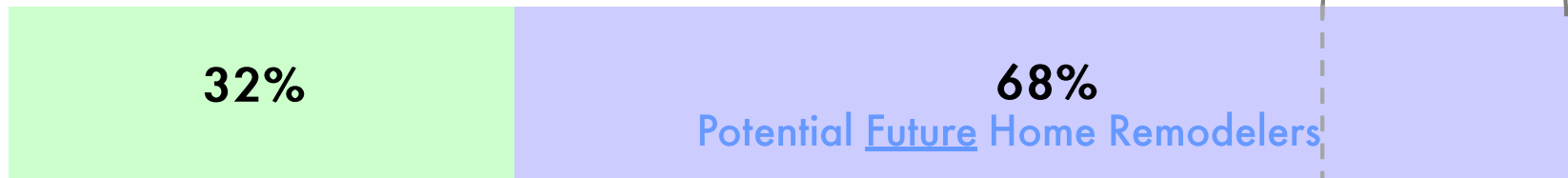
Large Pool of Future Home Renovators

- Only one-third of US homeowners are perfectly satisfied with their homes
- Another 9% are actively planning their home renovation projects
- This leaves 59% of the US pop. as **potential future home remodelers**

Which area in your home is most in need of a makeover or remodeling job?
(US Adults 18 and Older)

- None of the above - I am perfectly satisfied with my home
- An area of my home is in need of a makeover

9% are actively planning a specific home improvement project - they are the focus of this report



Top areas in need of a future makeover by the general population are:

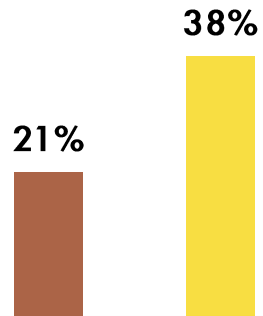
- Kitchen (18%)
- Master Bath (12%)
- Living Room (7%)

Even Among the General Population, Most Homes are in Need of a Makeover

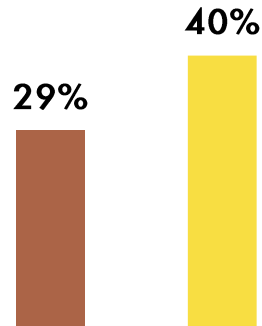
1 in 3 Planning Home Improvement had Deferred Those Plans in the Past Month...

• **But with Improved Finances and Consumer Confidence, they're Now Ready to Take on That Project**

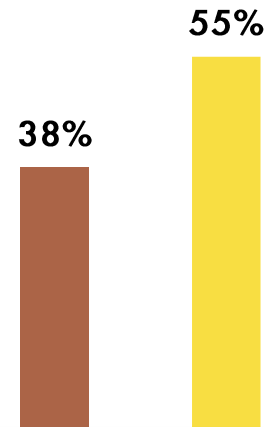
Deferred Home Improvement Projects Last Month



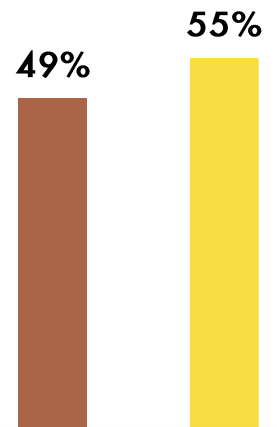
Financially Better Off Than Last Year



Financially Secure



Confident of Strong Economy



Adults 18+ Planning Home Improvement



Especially in the West (42%)

Over the last 30 days, have you put off or deferred purchases in any of the following areas?
(Home Improvement Projects)

Adults 18+ Planning Home Improvement



Especially in the Midwest (47%)

Regarding your personal financial situation, compared to this time last year, are you *better off*?
(Better Off)

Adults 18+ Planning Home Improvement



Especially in the West (60%)

How do you feel about your overall financial security (on a scale of 1-5)?
(Somewhat or Very Secure/ Financially Stable)

Adults 18+ Planning Home Improvement



Especially in the West (60%)

Which one of the following best describes your feelings about chances for a strong economy during the next 6 months?
(Confident/Very Confident)

Who is Making Home Improvements?

Over 35

Educated

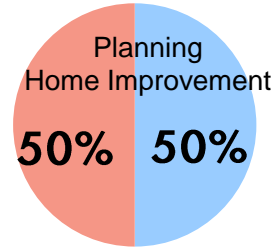
High Income

Purchase Influencer

Married

Homeowner

Professional



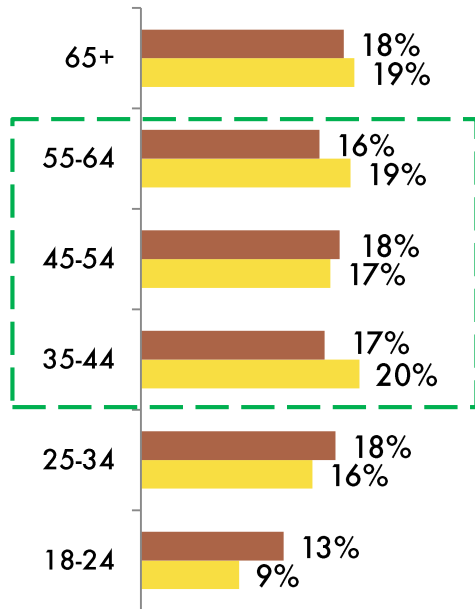
Male
Female

Even Gender Split

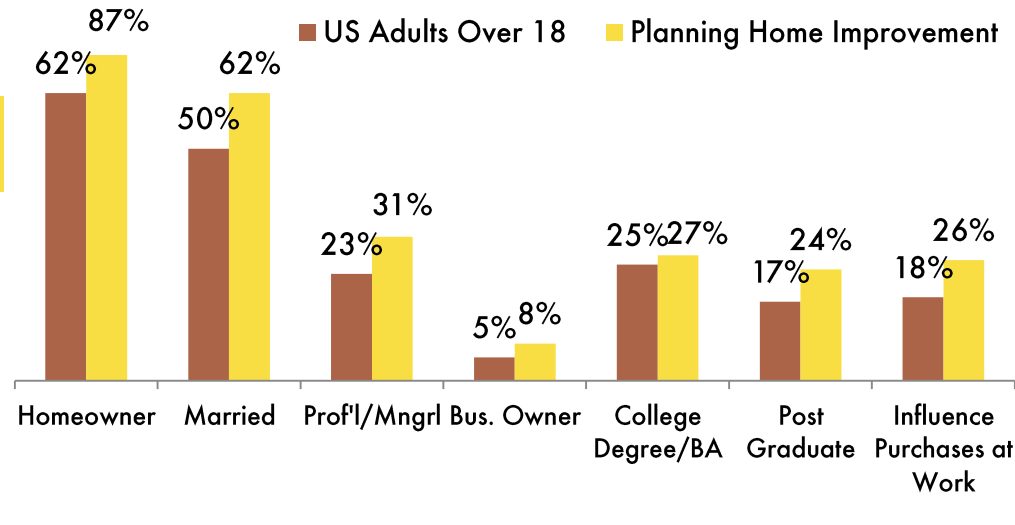
US A18+: 51%:49%

Avg. Household Income A18+: **\$65,082**
Avg. Household Income A18+ Planning Home Improvement: **\$85,205**

Home Renovators Earn 31% More



Most are 35-64



Do you plan to make any of the following major (big dollar) purchases within the next 6 months? (Major Home Improvement or Repair)

It's Not Just Home Improvement Items They're Buying

Home Renovators are Planning Major Purchases in General

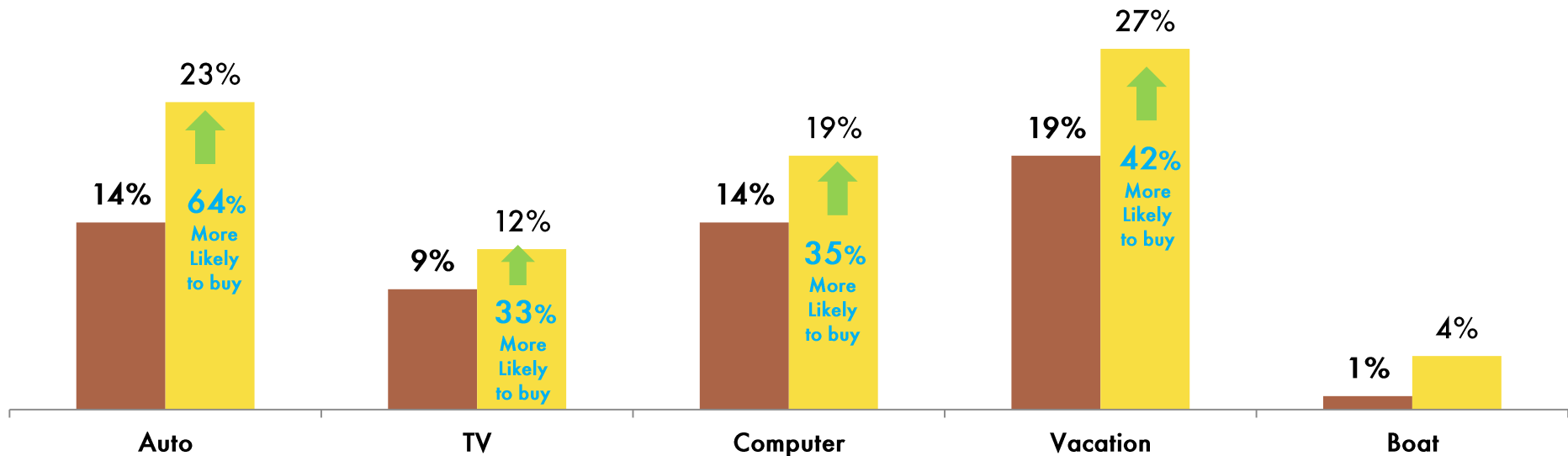
- Those planning a home improvement project are more likely to be buying a Car, Boat, TV, Computer and go on Vacation.

Major Purchase Plans

Do you plan to make any of the following major (big dollar) purchases within the next 6 months?
(Check all that apply)

Are you planning to buy/lease a car/truck within the next 6 months?

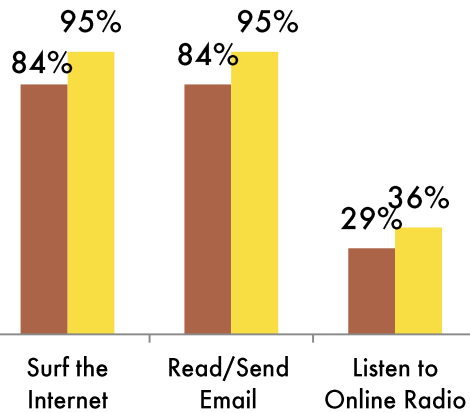
■ US Adults 18 and Older ■ A18+ Planning Home Improvement



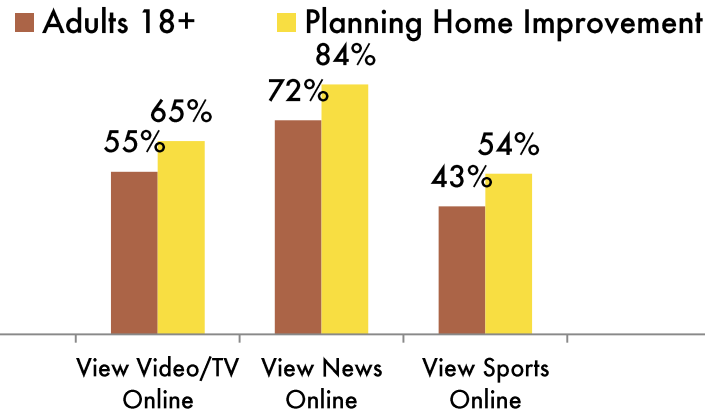
Home Renovators Are More Digital and Mobile Savvy

They are More Likely to Do Any Mobile or Digital Activity Than the General Population

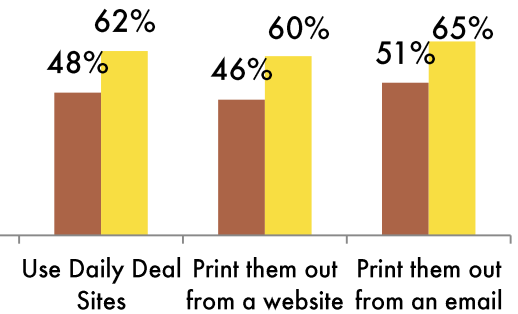
Online Activities



Online Media



Daily Deals & Online Coupons

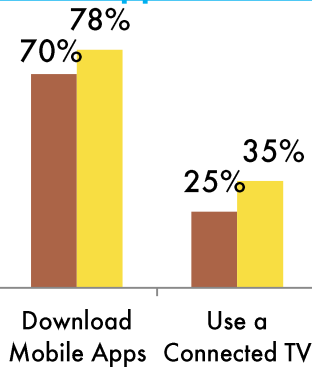


On an average WEEK (MONDAY-SUNDAY), do you...?

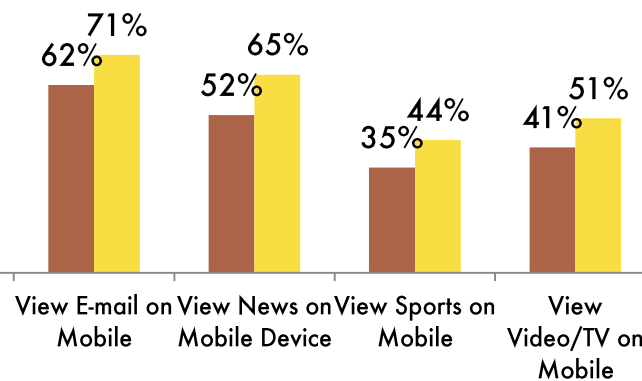
Which of the following do you do regularly or occasionally?

Do you use 'Daily Deal' type sites? Do you redeem coupons in any of the following ways?

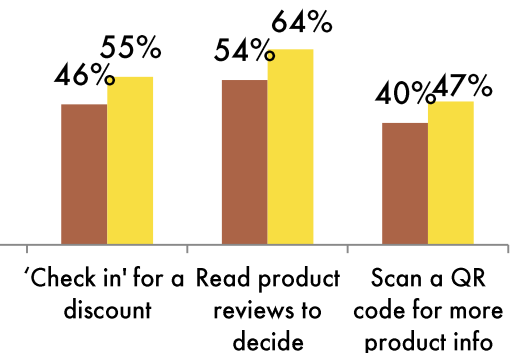
Mobile Apps & ConnectedTV



Mobile Activities & Mobile Media



Use Mobile While Shopping



Do you download apps to your mobile device?

Which of the following do you use regularly or occasionally?

Which of the following do you do regularly or occasionally?

How often do you do any of the following on your smartphone or tablet while shopping in a store?

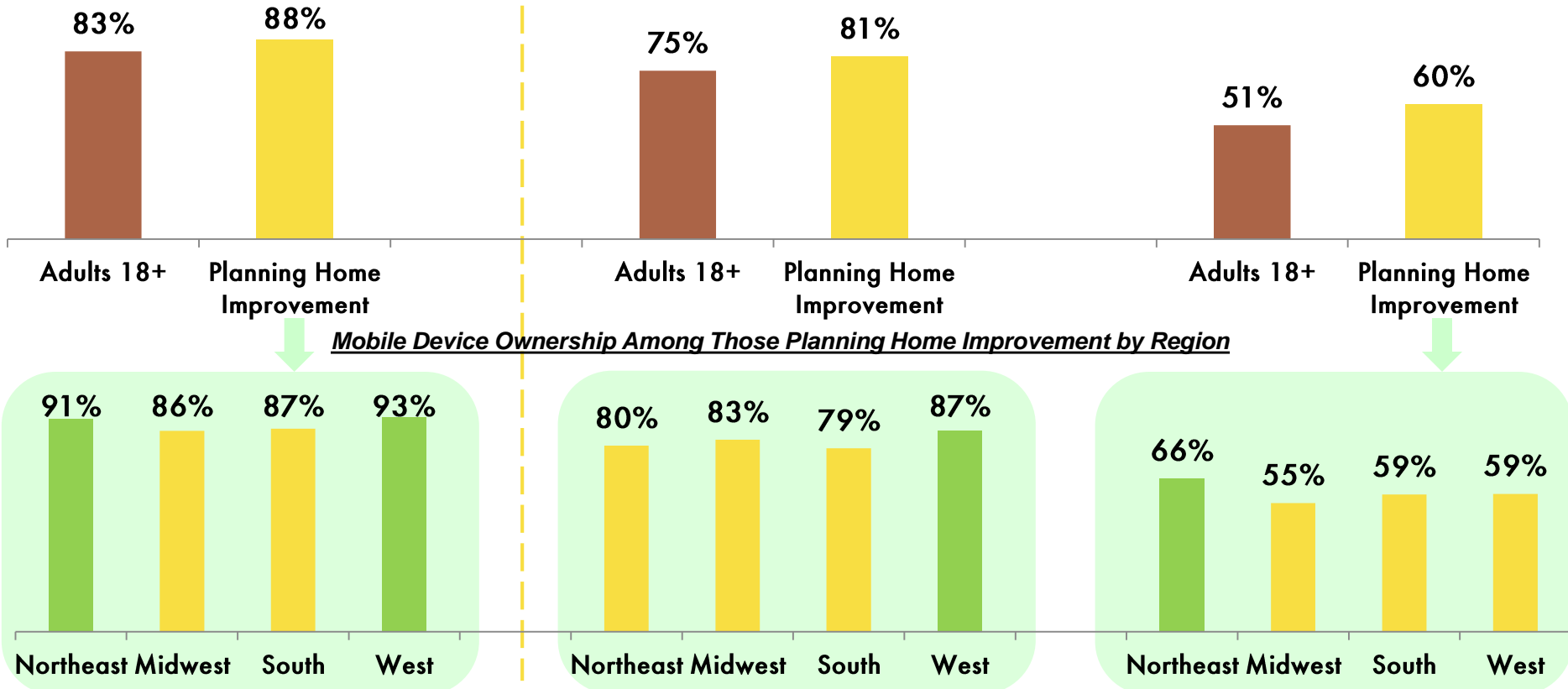
Home Renovators Are More Likely to Own Mobile Devices

- Highest smartphone ownership is among those planning a home improvement project in the West
- Highest Tablet ownership is among those planning a home improvement project in the Northeast

Own a Smartphone or Tablet:

Own a Smartphone:

Own a Tablet:



Do you own either of the following devices?

Even When They're Not Planning a Project

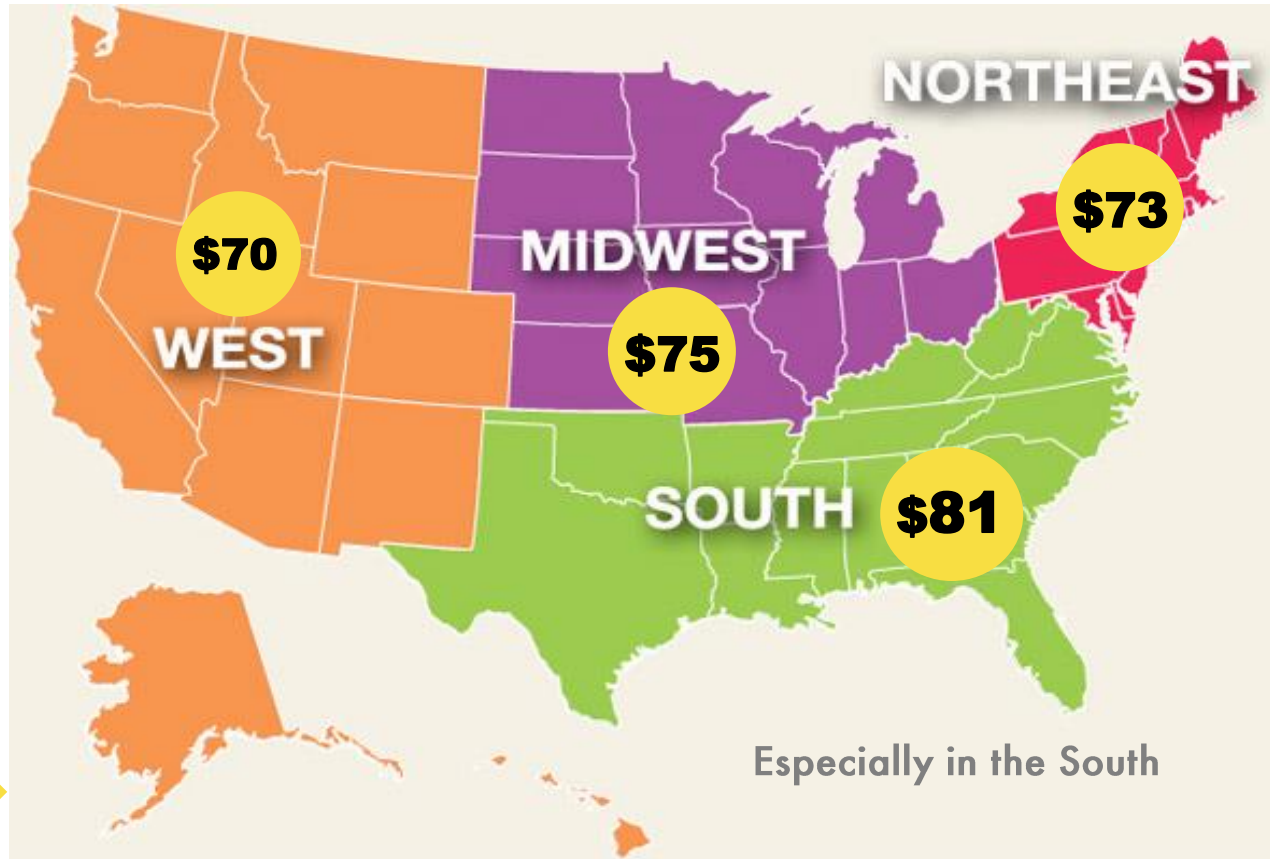
Home Renovators Spend More on Hardware Overall in a Typical Month

In an average month, approximately how much do you spend on Home Improvement/Hardware Items?

US Adults Planning Major Home Improvements or Repairs Spend **\$76 on Hardware Monthly vs. **\$46** for US Adults overall**

Spend 64% More Monthly

Monthly purchase amounts vary by region...



Those who are planning a home improvement are distributed regionally across the US proportionate to the US population

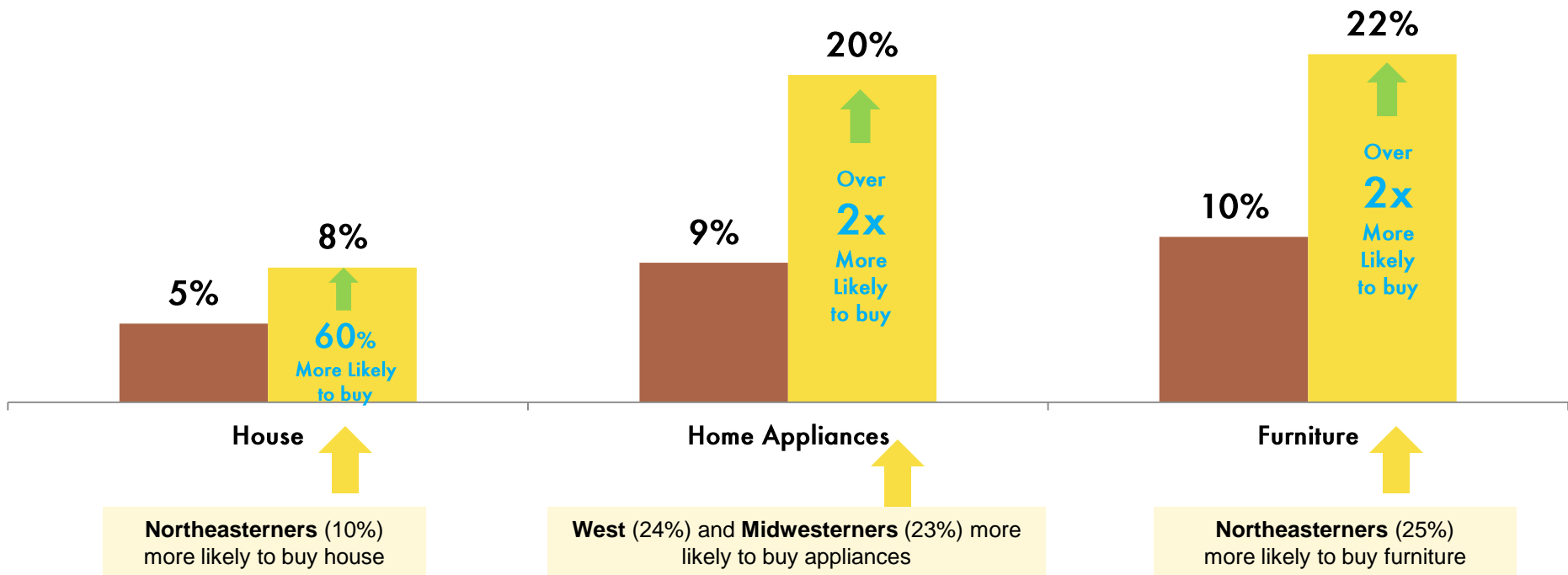
It's Not Just Hardware They're Buying...

- Those planning a home improvement project are more likely to be buying a house and more than twice as likely to be buying appliances and furniture

Home Related Major Purchases

Do you plan to make any of the following major (big dollar) purchases within the next 6 months?
(Check all that apply)

■ US Adults 18 and Older ■ A18+ Planning Home Improvement

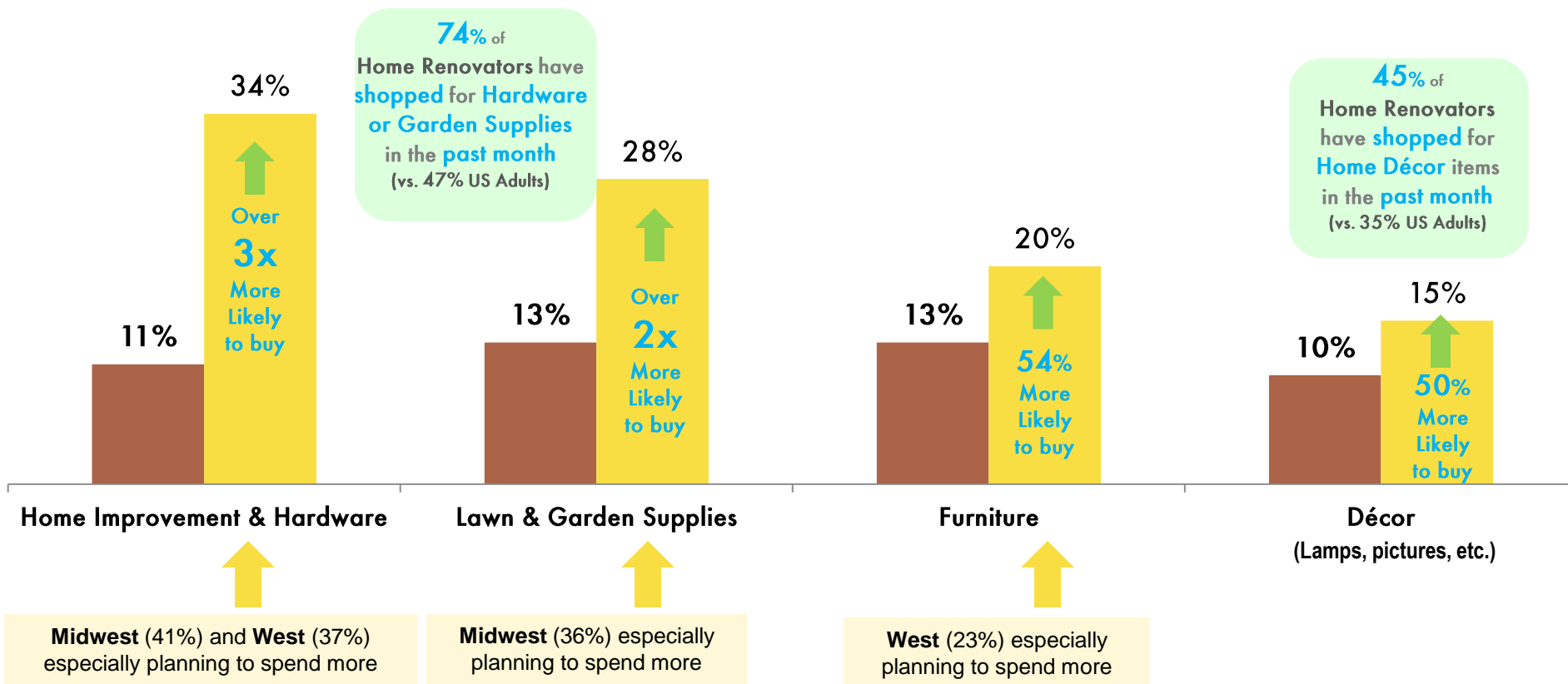


Home Renovators are Planning to Spend More on Home Related Products

Planning to Spend More on Home Related Purchases

Over the next 90 days, do you plan on spending more, the same or less on the following items than you would normally spend at this time of the year? (more)

■ US Adults 18 and Older ■ A18+ Planning Home Improvement



In the past 30 days, have you shopped for the following products? (Home Decor), (Hardware or Garden Supplies)

Home Renovators Spend Twice as Much on Lawn and Garden Supplies

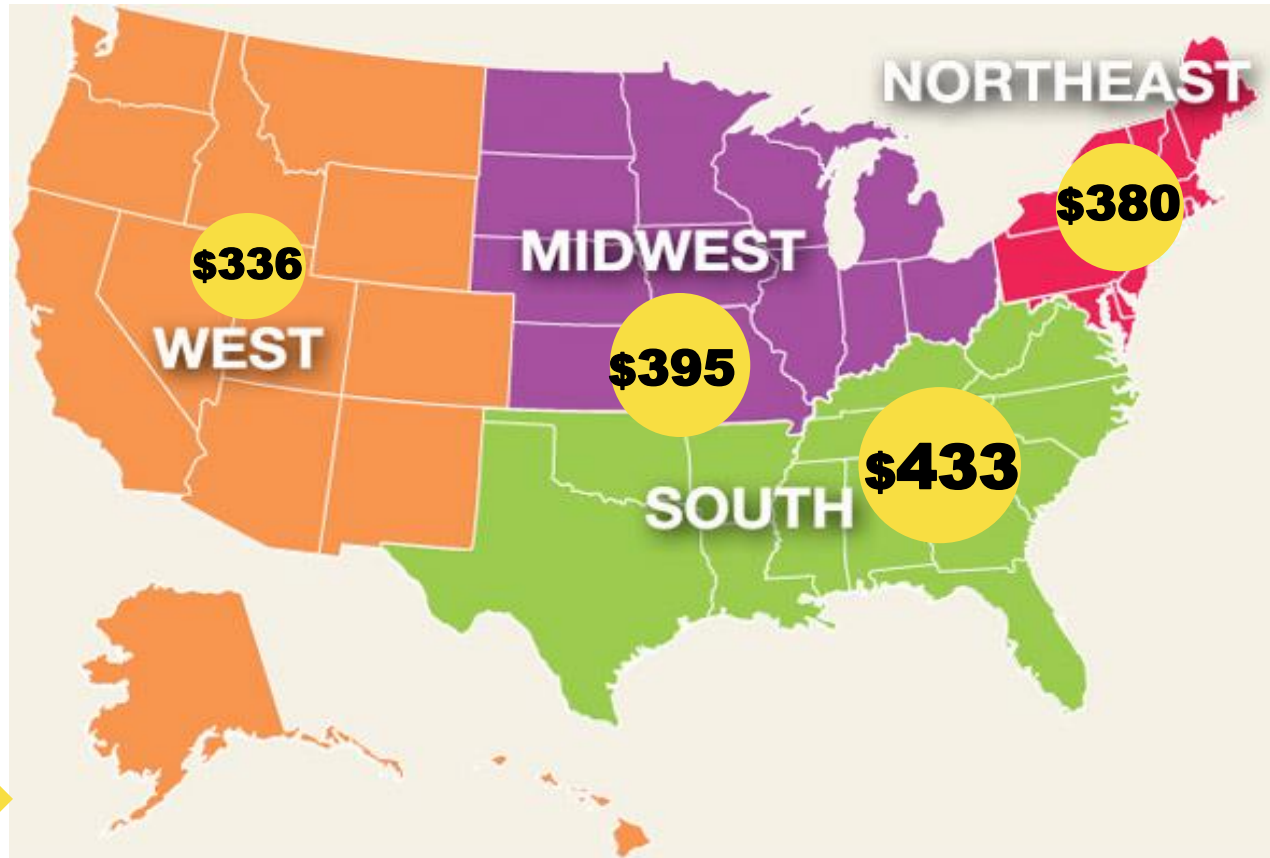
Especially in the South

Approximately how much do you plan to spend on Lawn & Garden Supplies this year?

US Adults Planning Major Home Improvements will Spend \$390 on Lawn & Garden Supplies vs. \$190 for US Adults overall this year

Spend **2x** More Annually

Yearly purchase amounts vary by region...



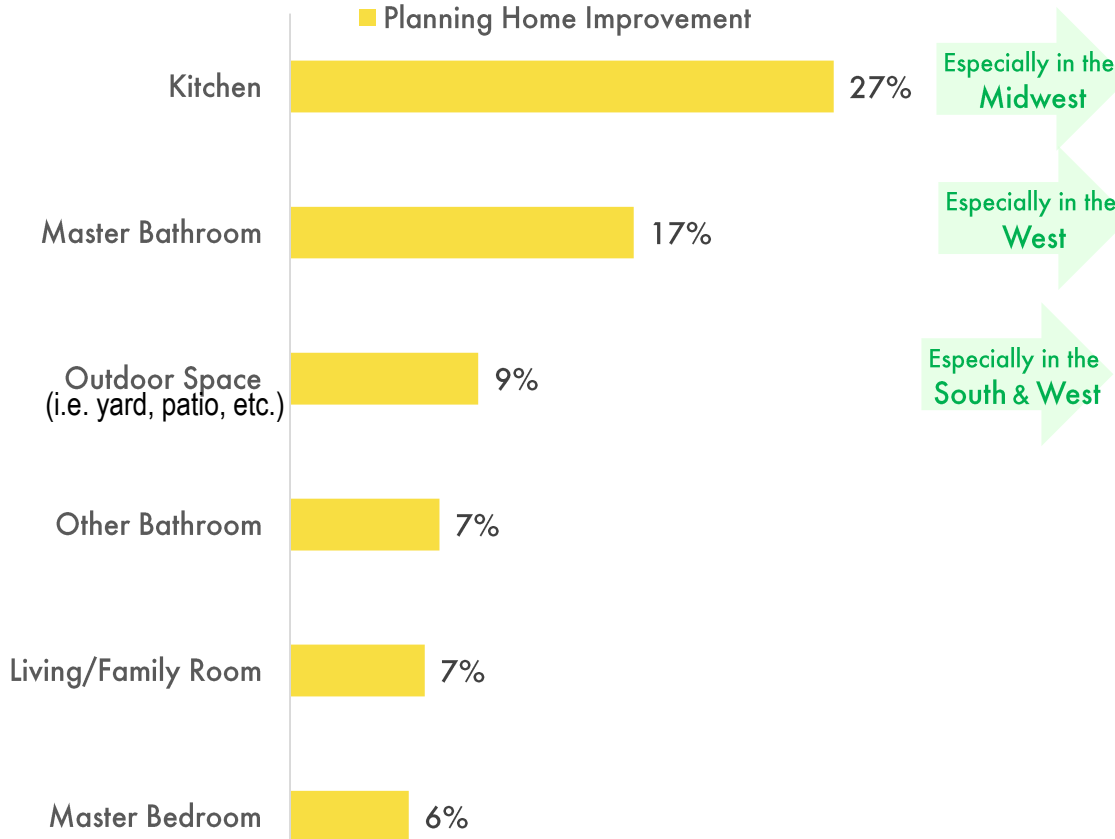
Those who are planning a home improvement are distributed regionally across the US proportionately to the US population

Kitchen Remodeling is the Most Popular Home Improvement Project

Followed by Bathroom and Outdoor Space Makeovers

Which area in your home is most in need of a makeover or remodeling job?

■ Planning Home Improvement



Especially in the Midwest

Especially in the West

Especially in the South & West

By Region*

Northeast Midwest South West

27% 35% 23% 25%

15% 18% 17% 19%

7% 6% 11% 11%

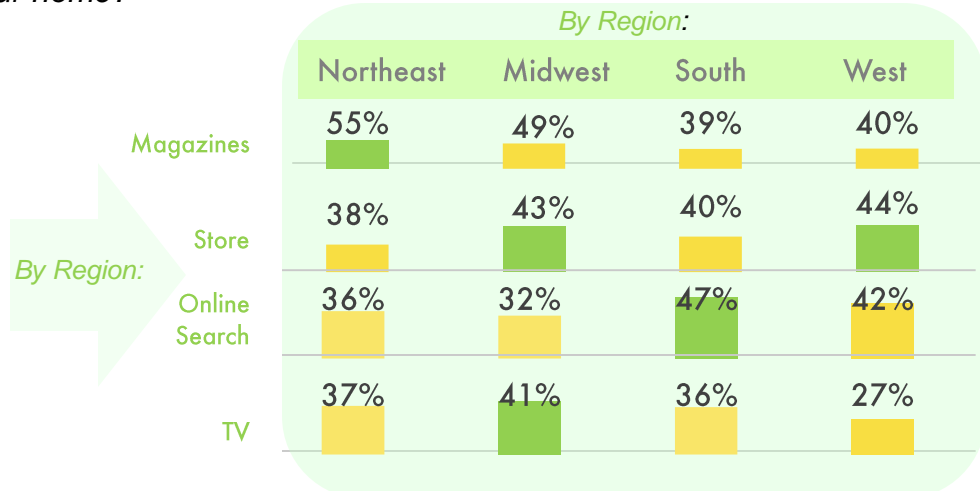
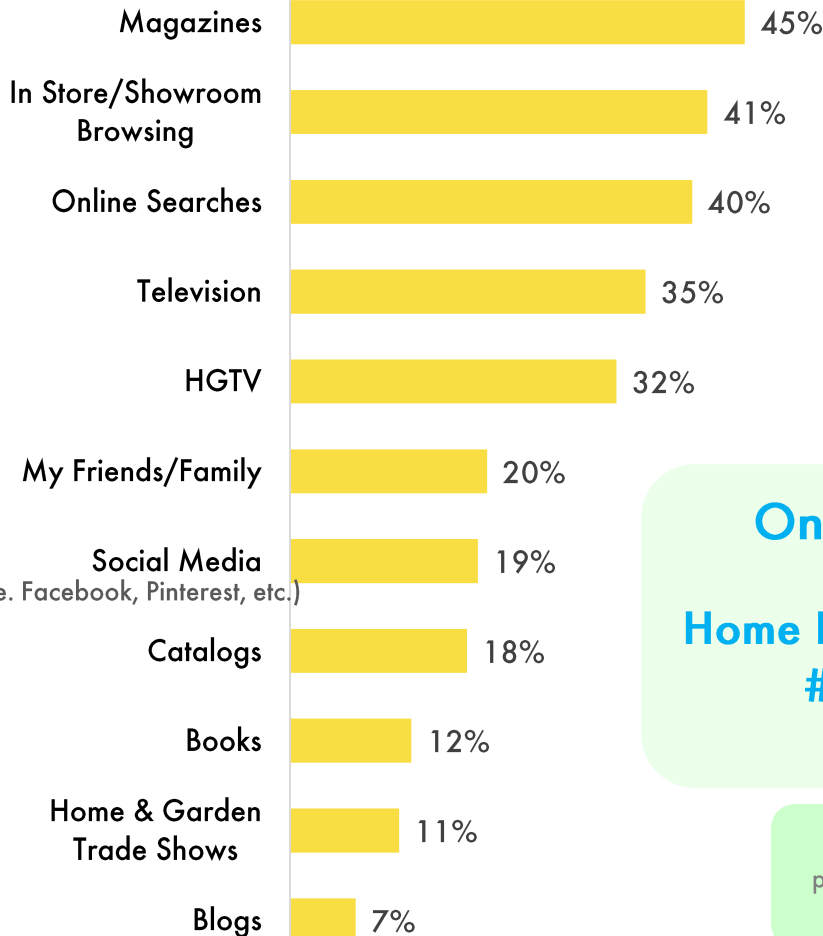
1 in 4
Plan a
Kitchen Makeover

*Caution: Low base size. Use directionally.

Where Do They Get Home Improvement Ideas?

Where do you look for design inspiration or ideas for your home?

■ Planning Home Improvement



Online Search is #3
source for
Home Improvement Ideas and
#1 for Southerners
planning a project

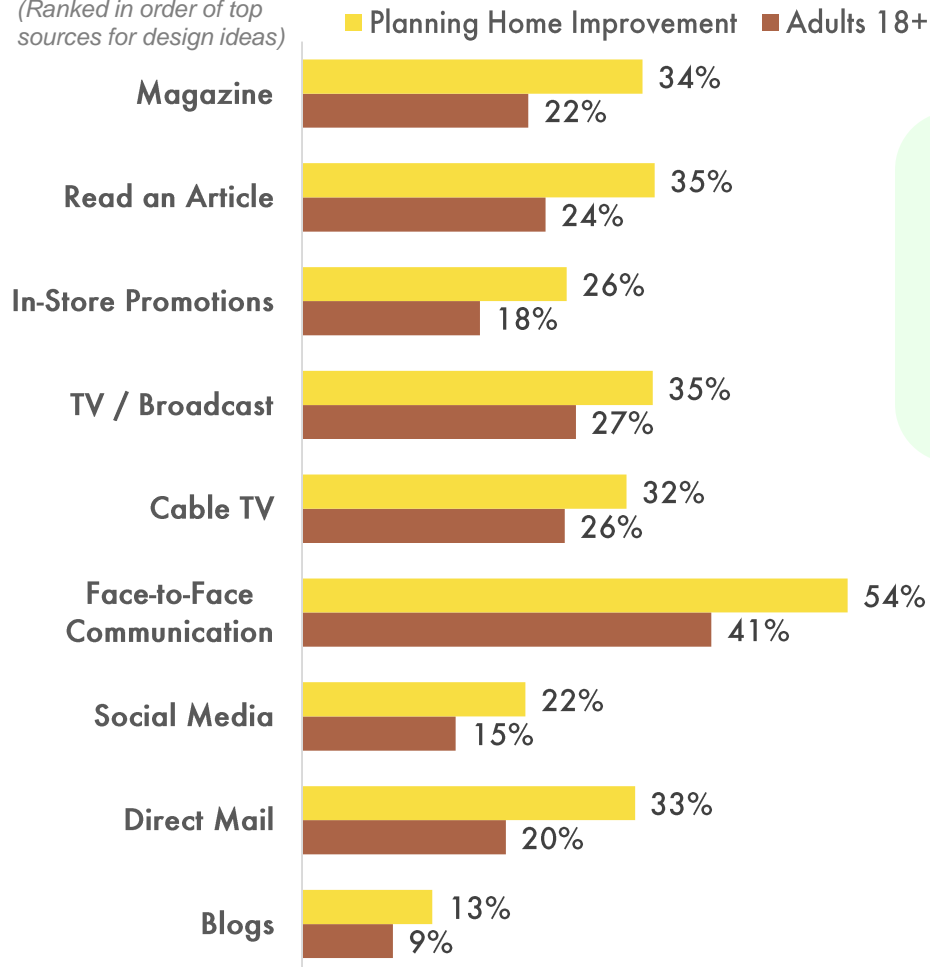
1 out of 5
Check Social Media
for Home Improvement Ideas

19% of Southerners
planning a project are influenced by
Search Ads (vs. 15% A18+)

Top Sources for Home Improvement Ideas Also Trigger Online Searches

Which of the following triggers you to start an online search?

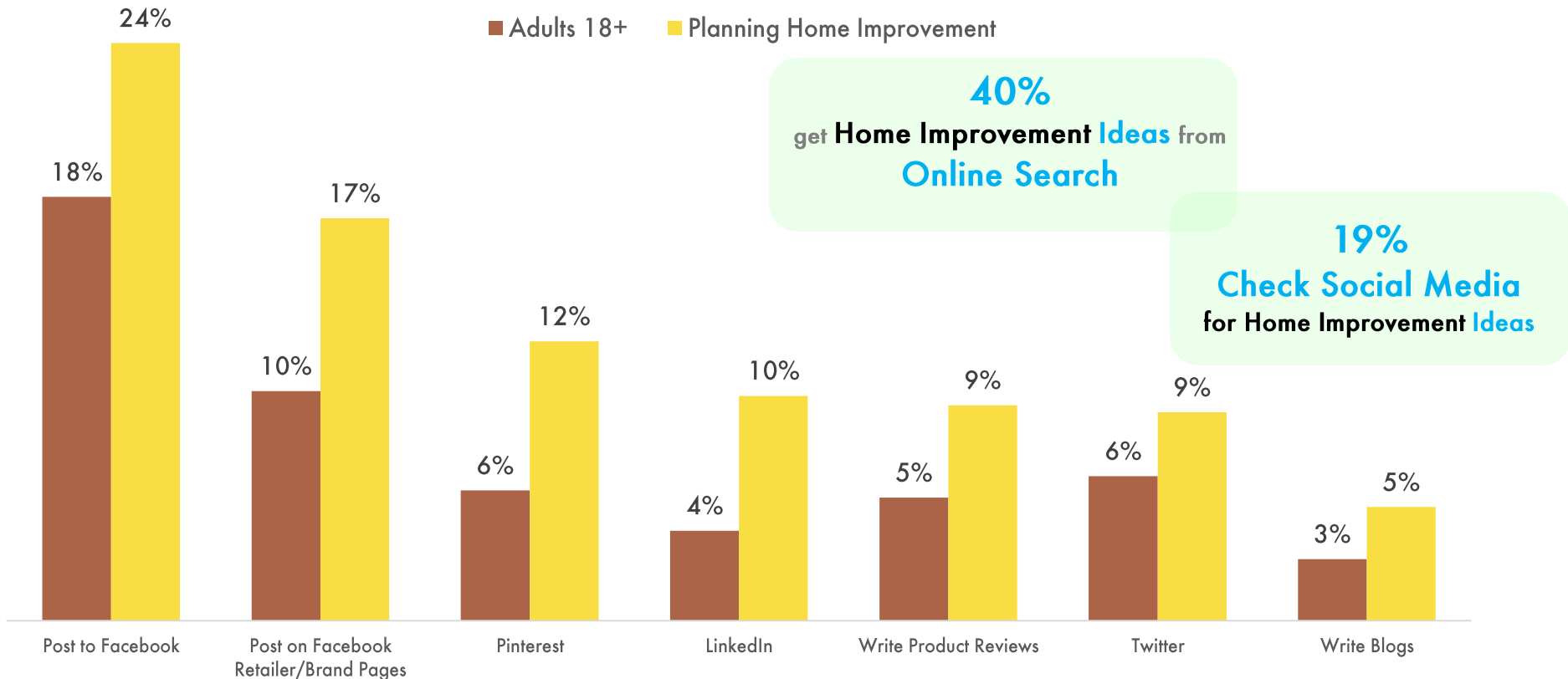
(Ranked in order of top sources for design ideas)



Those Planning Home Improvement are
More Likely to Search Online
After Exposure to
Other Media

In Turn, Home Renovators are More Likely to Share Their Search Findings on Social Media

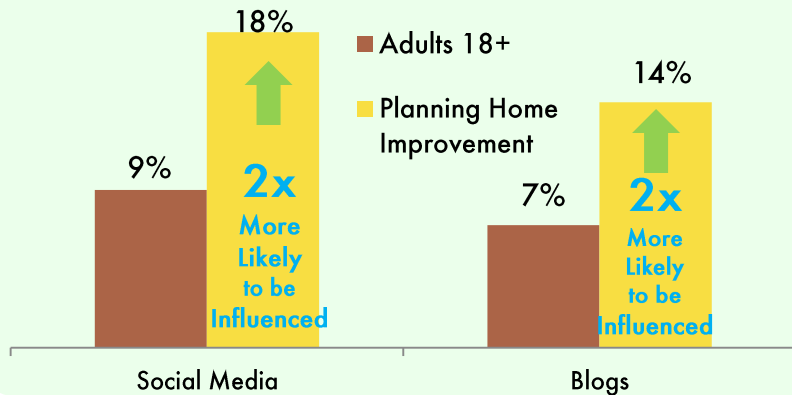
After searching, how do you communicate with others about a service, product or brand?
(Check all that apply)



Social Media Influences Home Renovators

- Home Renovators are more likely to seek product advice from others, via social media, and are twice as influenced by social media in their home improvement purchases.

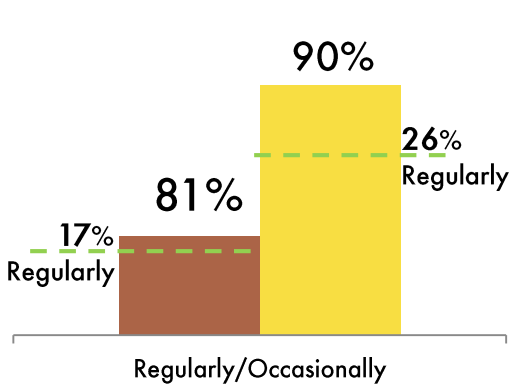
Social Media Influence on Home Improvement Purchases



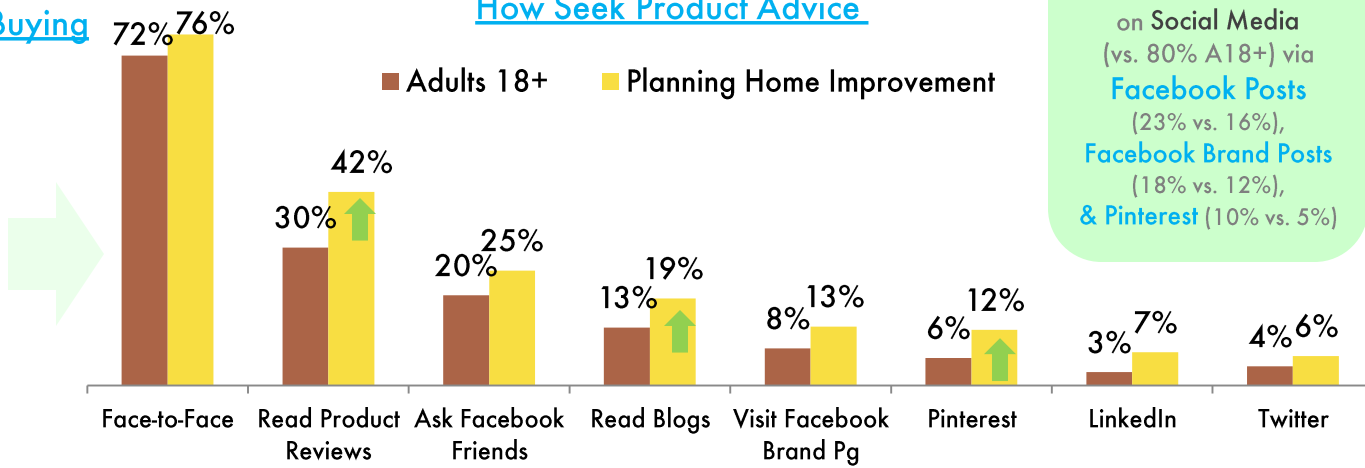
75% of Home Renovators **Check Social Media** at least once a week (vs. 63% A18+) **19% check it** for Home Improvement Ideas

92% also Give Advice on Social Media (vs. 80% A18+) via **Facebook Posts** (23% vs. 16%), **Facebook Brand Posts** (18% vs. 12%), & **Pinterest** (10% vs. 5%)

Seek Advice from Others Before Buying



How Seek Product Advice



For HOME IMPROVEMENT PURCHASES, please tell us which of the following media influence your purchases (Social Media, Blogs)

When you purchase products or services, do you seek advice from others before buying? (Regularly means routinely, as a set pattern; Occasionally means no set pattern, as mood suits)

How do you seek advice from others about products and services before buying?

IAB Digital Influence on Home Improvement Plans, Aug. 2015

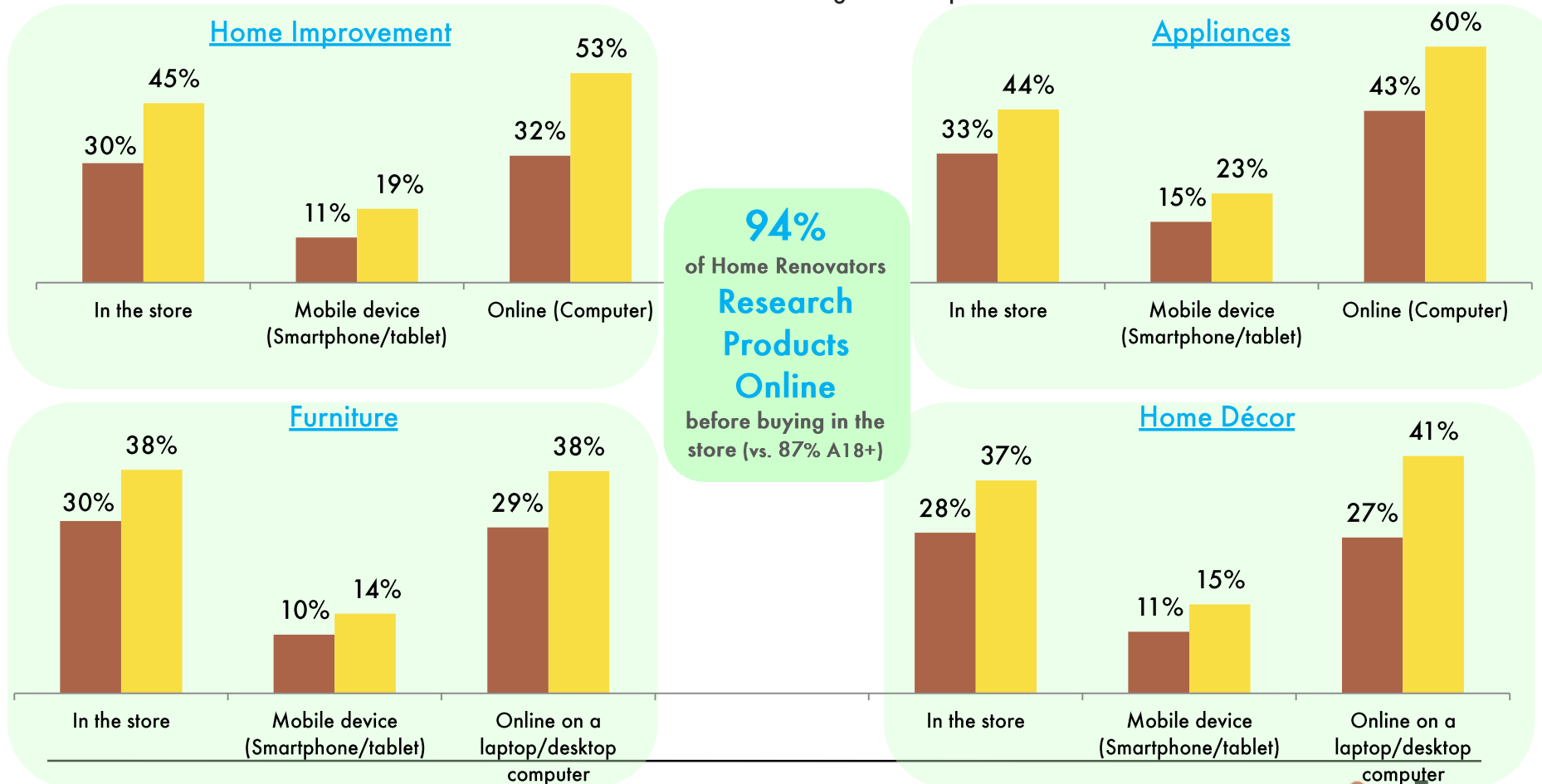
Home Improvement Products are Researched Across Devices

Providing Opportunities to See Digital and Mobile Ads

- Home Renovators are more likely to research home related items online than in the store

Which of these ways do you research the following items before purchasing?

■ Adults 18+ ■ Planning Home Improvement

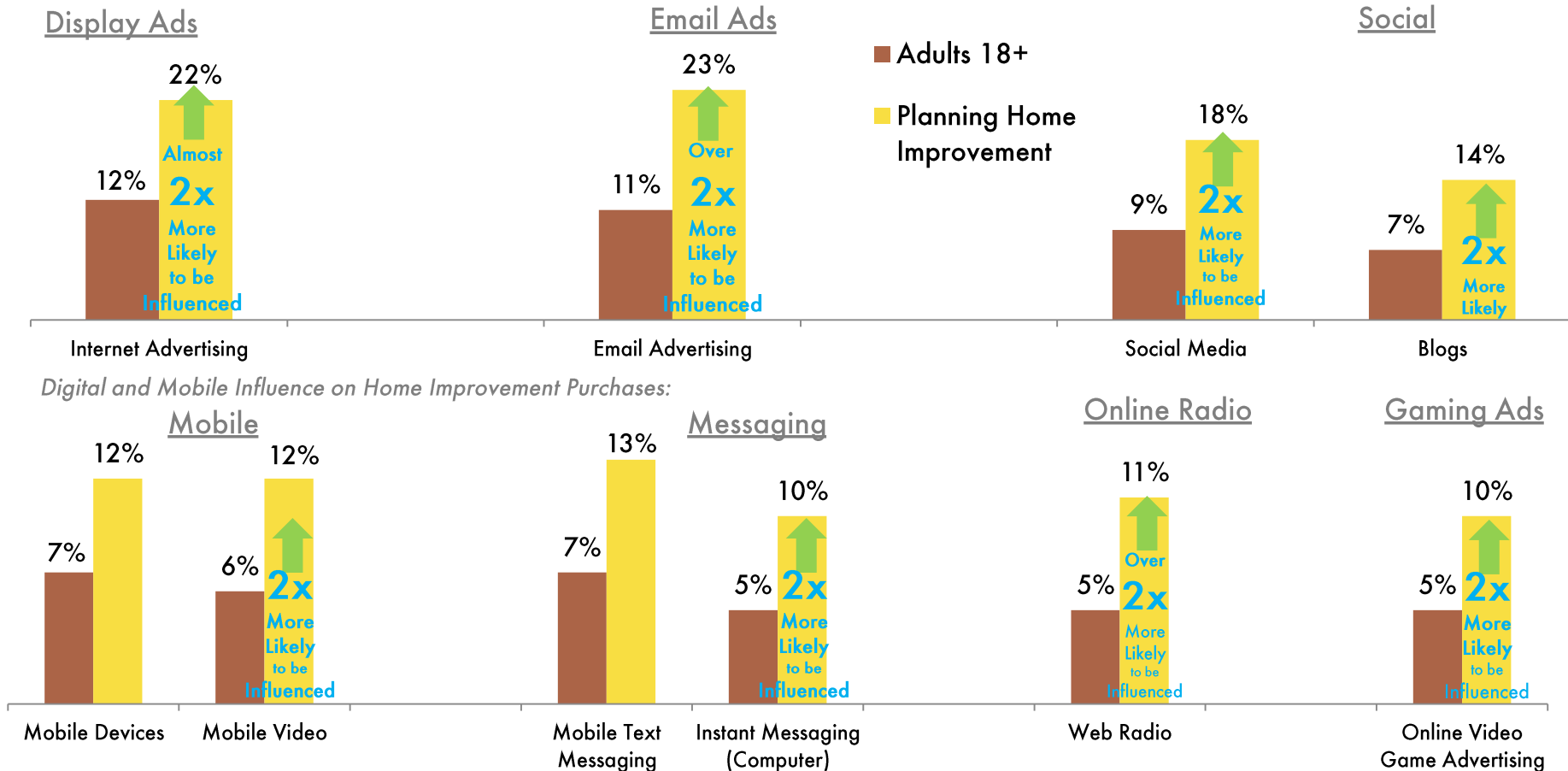


While Researching Online, Home Renovators Encounter Digital and Mobile Ads

Which are Twice as Likely to Influence Their Home Improvement Purchases

- Those planning home improvement are twice as likely as the general population to be influenced by online ads
- Nearly 1 in 4 who are planning home improvement are influenced by display or email ads in those purchases

Please tell us which of the following media influences your HOME IMPROVEMENT purchases:

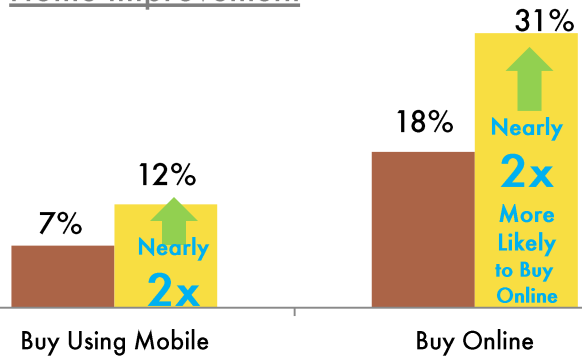


Home Renovators are Also More Likely to Buy Home Related Products Online or on Mobile Devices

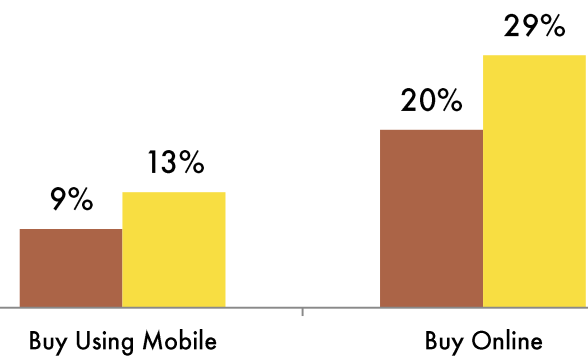
- Roughly One-Third of Home Renovators Buy Home Related Products Online
- Roughly One in Ten Make These Purchases on Mobile Devices

■ Adults 18+ ■ Planning Home Improvement

Home Improvement

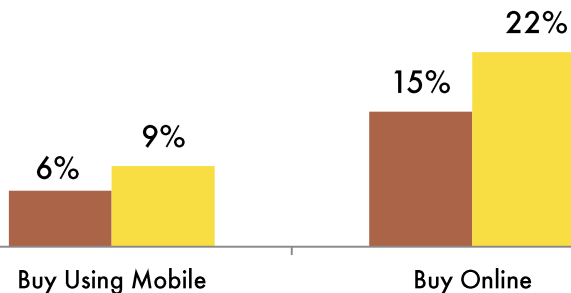


Appliances

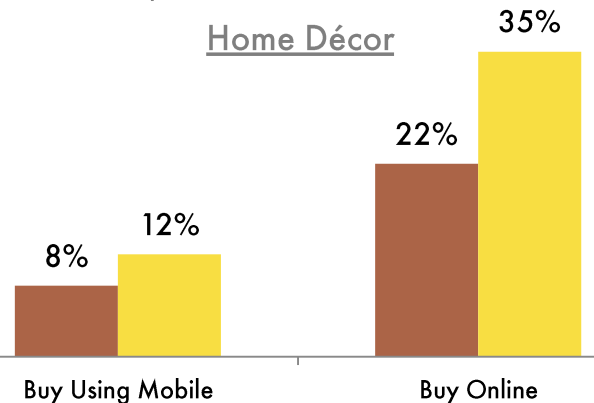


Have you ever purchased any of the following items on a mobile device, online on a computer, or in a store?

Furniture



Home Décor



Summary and Implications

Being digital- and mobile-savvy, home renovators tend to use the internet for their home improvement projects. Home renovators rely heavily on their computers and mobile devices for planning, searching, socializing, researching and shopping for home improvement products:

- **Planning:** Search is the #3 source for home improvement ideas and is #1 among Southerners. 19% get ideas from Social Media.
- **Search:** Those planning home improvement are much more likely to search online after exposure to other media, thus their top sources for home improvement ideas lead them online. In other words, TV or a magazine article might influence a home renovator to do an online search on their computer or mobile device, where they're more likely to be influenced by digital ads.
- **Social:** Home renovators are more likely to share their search findings on social media. Home renovators are more likely to seek (90% vs. 81%A18+) and give (92% vs. 80%A18+) others product advice, particularly via social media, and are twice as influenced by social media (18% vs. 9%A18+) in their home improvement purchases as the general population.
- **Research:** 94% of home renovators research products online in general before buying in the store (vs. 87% A18+). When it comes to home related products in particular, Home Renovators are much more likely to research these items online than in the store: Home Improvement Products (53% online vs. 45% in store), Appliances (60% online vs. 44% in store), Home Décor (41% online vs. 37% in store). Home improvement products researched on computers, tablets and smartphones provide opportunities to see digital and mobile ads.
- **Shopping:** 31% of home renovators have bought home improvement products online (vs. 18% A18+), and 12% have bought them on mobile (vs. 7% A18+). Home renovators also buy other home related products online or using their mobile devices: Appliances (29% online, 13% via mobile), Furniture (22% online, 9% via mobile) and Home Décor (35% online , 12% via mobile).

Summary and Implications

Online ads influence home renovators. While doing all of these online and mobile activities around home improvement, home renovators inevitably encounter digital and mobile ads. Home renovators are nearly twice as likely as the general population to be influenced by digital and mobile ads in their home improvement purchases: 22% say display ads influence their home improvement purchases (vs. 12% of the general population), 23% cite the influence of email ads (vs. 11%) and 18% cite social media (vs. 9%).

How does this impact marketers? Those who are planning a major home improvement are big spenders, both in products related to home improvement and in unrelated big ticket purchases. Home renovators also happen to be digital- and mobile-savvy, doing numerous activities on their computers and devices which expose them to digital and mobile media, particularly activities related to home improvement. They're also more likely to go online as a follow up to viewing traditional media.

Since the internet is critical to this group, internet advertising is crucial in reaching home renovators. Any media mix geared towards home improvement consumers should include a strong digital and mobile component. Since home renovators research ideas and read product reviews online, native advertising should be considered. Social media should be integrated into the media mix as well since it strongly influences home renovators both in their purchases and in their recommendations to others.

Cross platform campaigns would also likely do well to reach those planning a home improvement project. Along with search, magazines, in-store and TV are among the top 5 sources for home renovation design ideas. Integrated in-store campaigns could be effective since home renovators are more likely to use their mobile phone while shopping in the store, 'check in' for discounts, use daily deal sites and print out online coupons.

Digital Influence on Hispanic Consumers Planning Home Improvement

12% of Those Planning Home Improvement or a Major Repair are Hispanic Americans

Hispanic Consumers Planning Home Improvement are Different from General Home Renovators

Hispanic Home Renovators are More Likely to be:

Parents

(Under 18 in Home)
(54% vs. 36%)

Under 45

(67% vs. 44%)

Slight Female Skew

(48% M:52% F)

Divorced

(15% vs. 10%)*

Less Likely to be:

Retired

(18% vs. 23%)*

Professional/Managerial

(25% vs. 30%)*

Similarities:

Purchase Influencer

(29% vs. 26%)

Married or Living with Partner

(71% vs 72%)

Above Avg. Income

(\$69k (vs \$65k US avg) vs \$85k)

*Do you plan to make any of the following major (big dollar) purchases within the next 6 months?
(Major Home Improvement or Repair) (Hispanic Adults 18 and Older compared to US Adults 18 and Older)*

*Use directionally. Low sample size

Hispanic Adults Planning Home Improvement are More Likely to Have Deferred Those Plans in the Past Month...

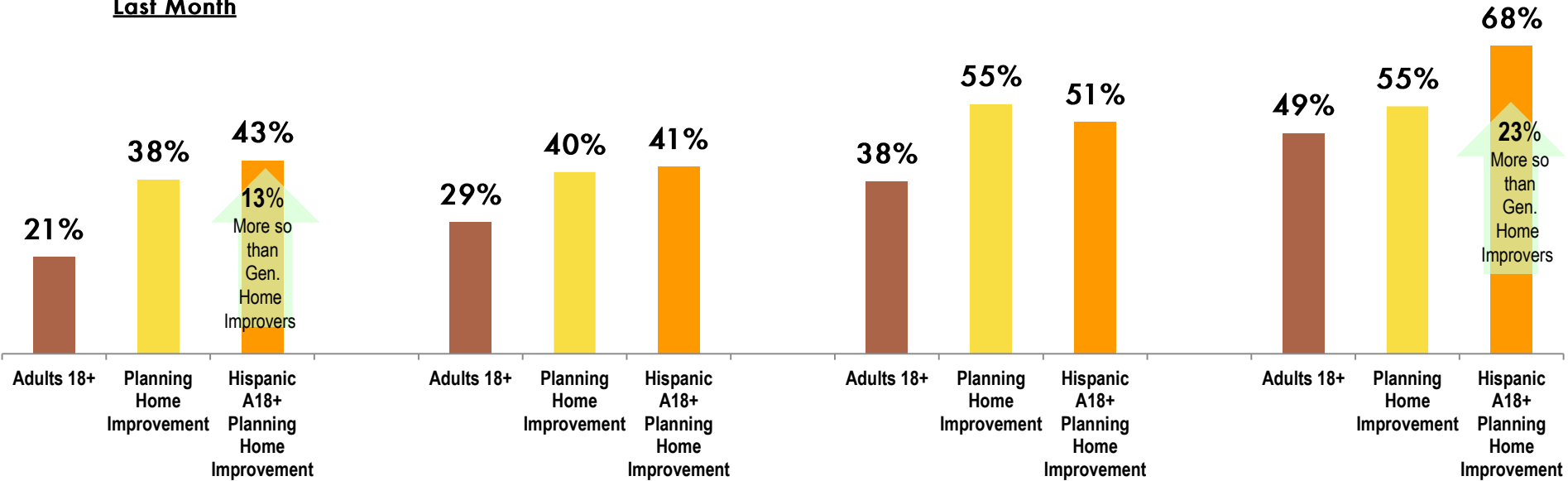
- But with improved finances and consumer confidence, Hispanic home renovators are now ready to take on that project
- Hispanic home renovators have higher consumer confidence: two-thirds expect a strong US Economy

Deferred Home Improvement Projects Last Month

Financially Better Off Than Last Year

Financially Secure

Confident of Strong Economy



Over the last 30 days, have you put off or deferred purchases in any of the following areas?
(Home Improvement Projects)

Regarding your personal financial situation, compared to this time last year, are you *better off*?
(Better Off)

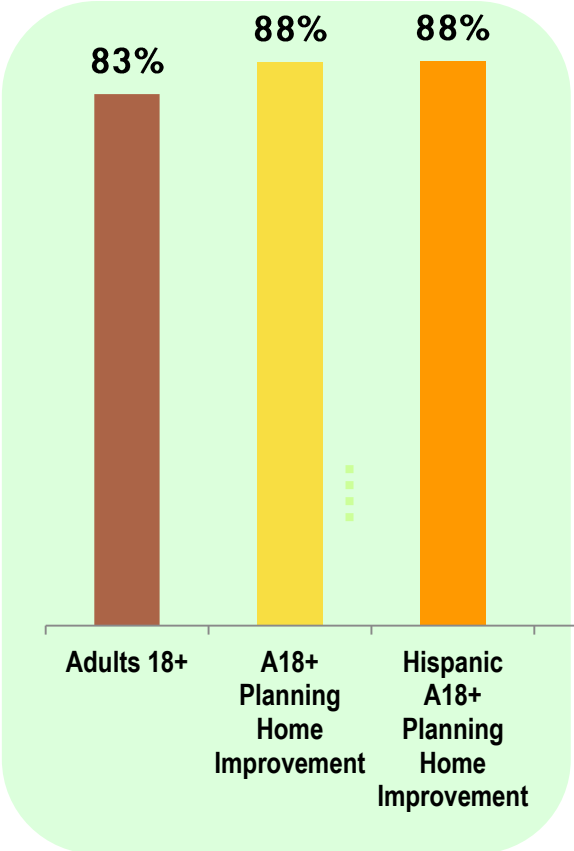
How do you feel about your overall financial security (on a scale of 1-5)?
(Somewhat or Very Secure/ Financially Stable)

Which one of the following best describes your feelings about chances for a strong economy during the next 6 months?
(Confident/Very Confident)

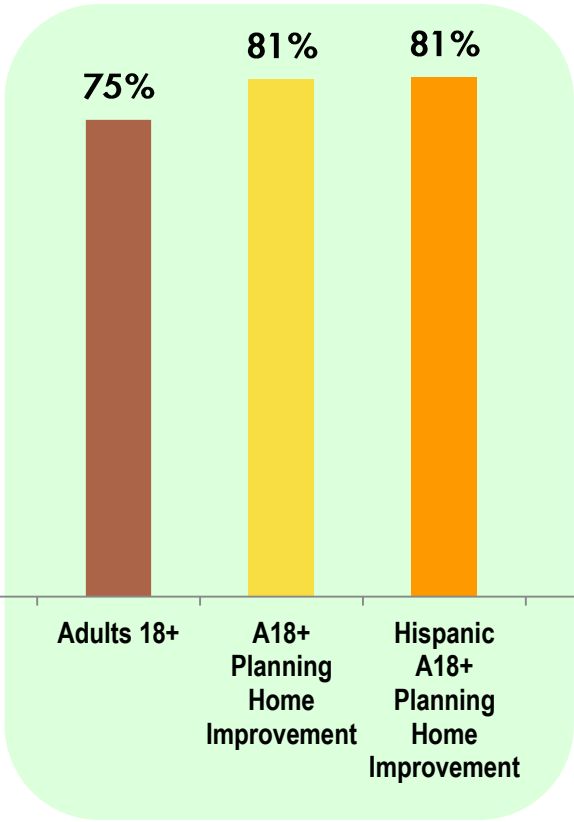
Hispanic Home Renovators Are Just as Likely to Own Mobile Devices as General Home Renovators

But They are More Likely to Use Their Mobile Devices, Especially for Home Improvement Shopping

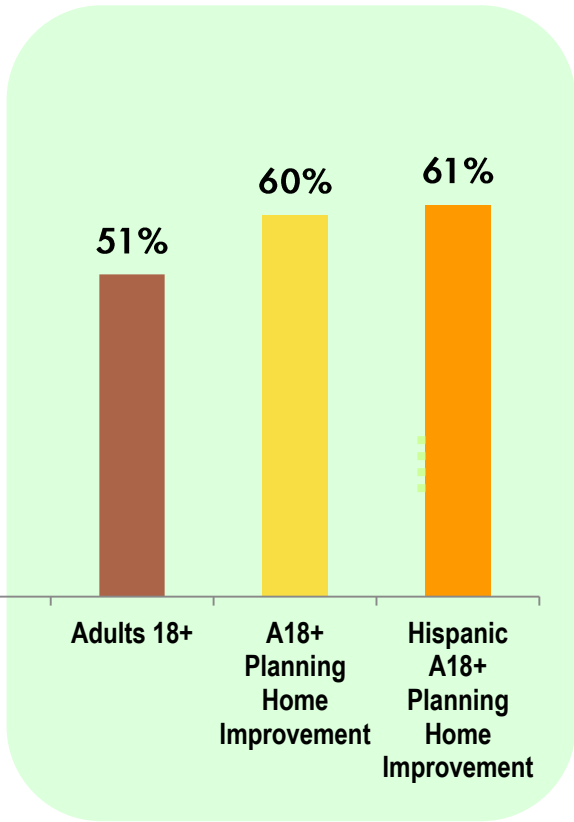
Own a Smartphone or Tablet:



Own a Smartphone:



Own a Tablet:

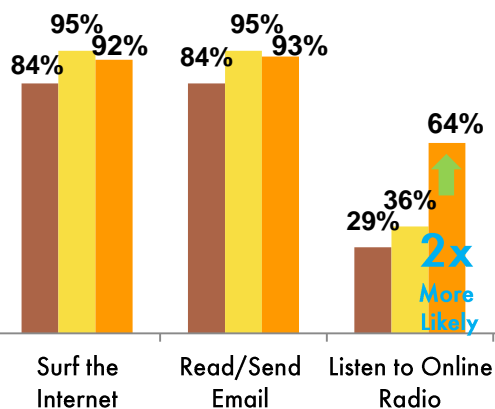


Do you own either of the following devices?

Hispanic Home Renovators Are More Digital & Mobile Savvy

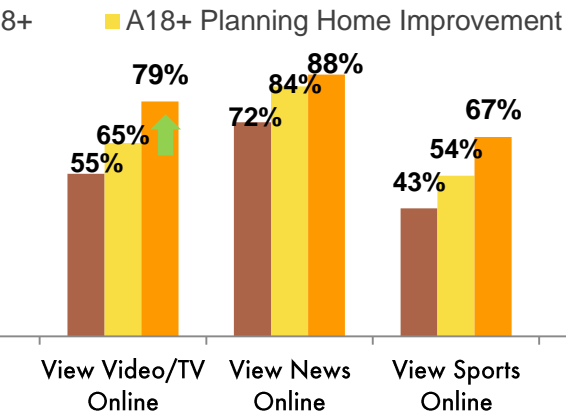
They are Much More Likely to Do Any Mobile Activity and Some Digital Activities Than General Home Renovators

Online Activities



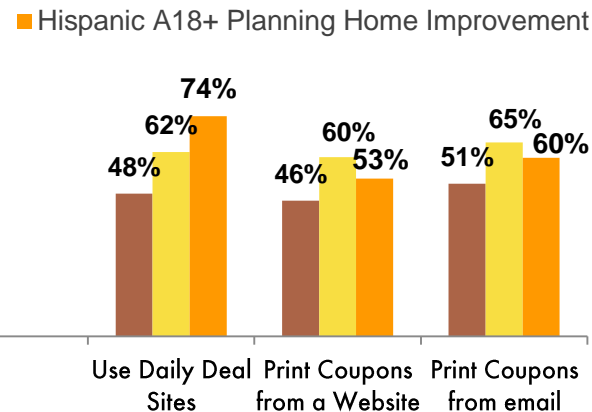
On an average WEEK (MONDAY-SUNDAY), do you...?

Online Media



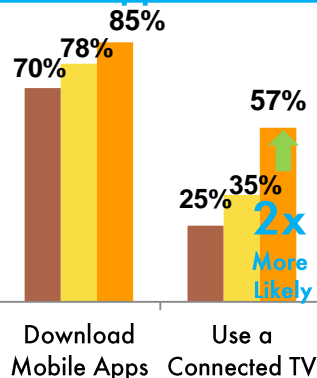
Which of the following do you do regularly or occasionally?

Daily Deals & Online Coupons



Do you use 'Daily Deal' type sites? Do you redeem coupons in any of the following ways?

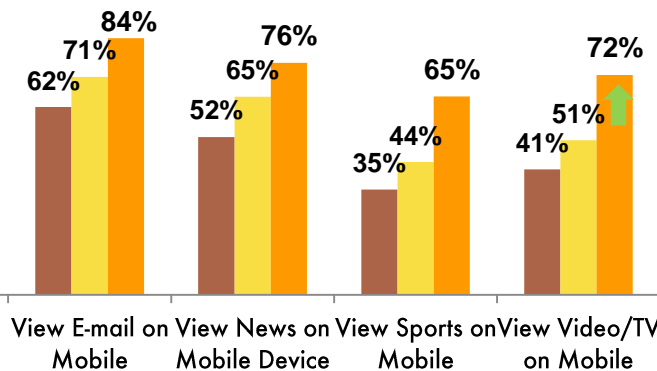
Mobile Apps & ConnectedTV



Do you download apps to your mobile device?

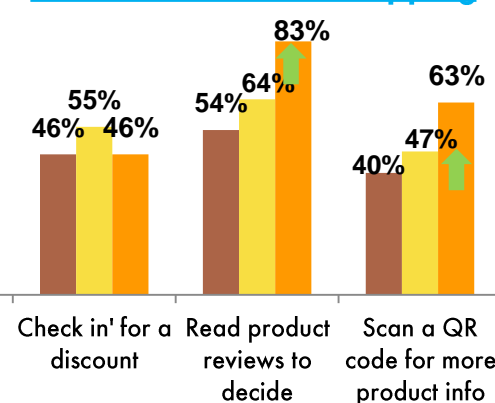
Which of the following do you use regularly or occasionally?

Mobile Activities & Mobile Media



Which of the following do you do regularly or occasionally?

Use Mobile While Shopping



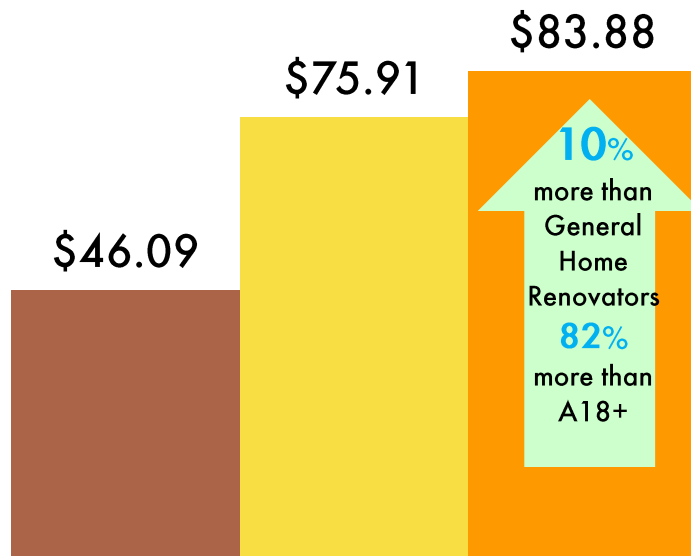
How often do you do any of the following on your smartphone or tablet while shopping in a store?

Hispanic Home Renovators Spend More on Home Improvement & Hardware

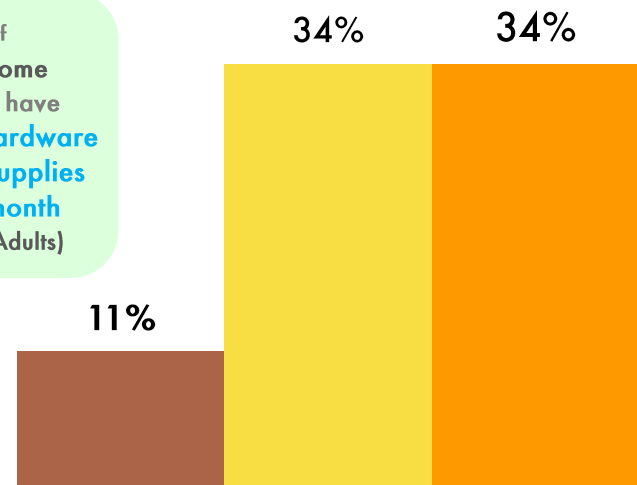
Monthly Spend on Home Improvement & Hardware

Planning to Spend More on Home Improvement & Hardware

- US Adults 18 and Older
- A18+ Planning Home Improvement
- Hispanic A18+ Planning Home Improvement



73% of Hispanic Home Renovators have shopped for Hardware or Garden Supplies in the past month (vs. 47% US Adults)



Home Improvement & Hardware

Home Improvement & Hardware

In an average month, approximately how much do you spend on Home Improvement/Hardware Items?

Over the next 90 days, do you plan on spending more, the same or less on the following items than you would normally spend at this time of the year? (more)

In the past 30 days, how have you shopped for the following products? (Home Decor)

Hispanic Home Renovators Choose Their Home Improvement Store for Different Reasons

Hispanic Consumers Planning Home Improvement Shop Differently from Overall Home Renovators

Top Reasons Hispanic Home Renovators Shop for Home Improvement & Hardware at their Favorite Store:

Price, Quality, Trustworthy Retailer are More Important to Hispanic Home Renovators

Why Shop at Favorite Hardware Store

What are the reasons why you buy your Home Improvement/Hardware Items there? (Check all that apply)

A18+ Home Renovators



Why Shop at
Favorite
Hardware Store
(Top 5 Reasons)

Hispanic A18+ Home Renovators

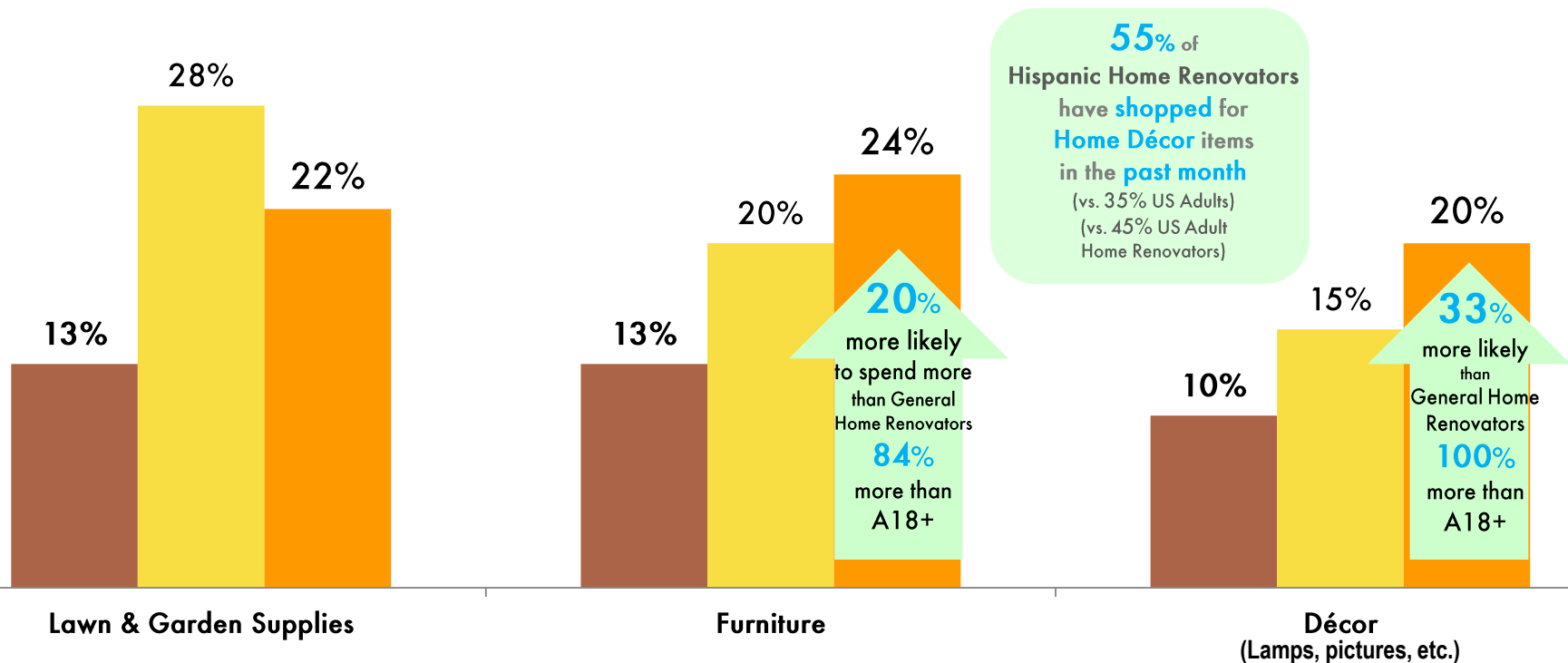


Hispanic Home Renovators are Planning to Spend More on Home Related Products Than General Home Renovators

Planning to Spend More on Home Related Purchases

Over the next 90 days, do you plan on spending more, the same or less on the following items than you would normally spend at this time of the year? (more)

■ US Adults 18 and Older ■ A18+ Planning Home Improvement ■ Hispanic A18+ Planning Home Improvement



In the past 30 days, how have you shopped for the following products? (Home Decor)

Hispanic Home Renovators Choose Their Lawn & Garden Store for Different Reasons

Hispanic Consumers Planning Home Improvement Shop Differently from Overall Home Renovators

Top Reasons Hispanic Home Renovators Shop for Lawn & Garden Products at their Favorite Store:

Quality is More Important to Hispanic Home Renovators

Why Shop at Favorite Lawn & Garden Store

What are the reasons why you buy your Lawn and Garden Items there? (Check all that apply)

A18+ Home Renovators

Hispanic A18+ Home Renovators



Why Shop at Favorite Lawn & Garden Store

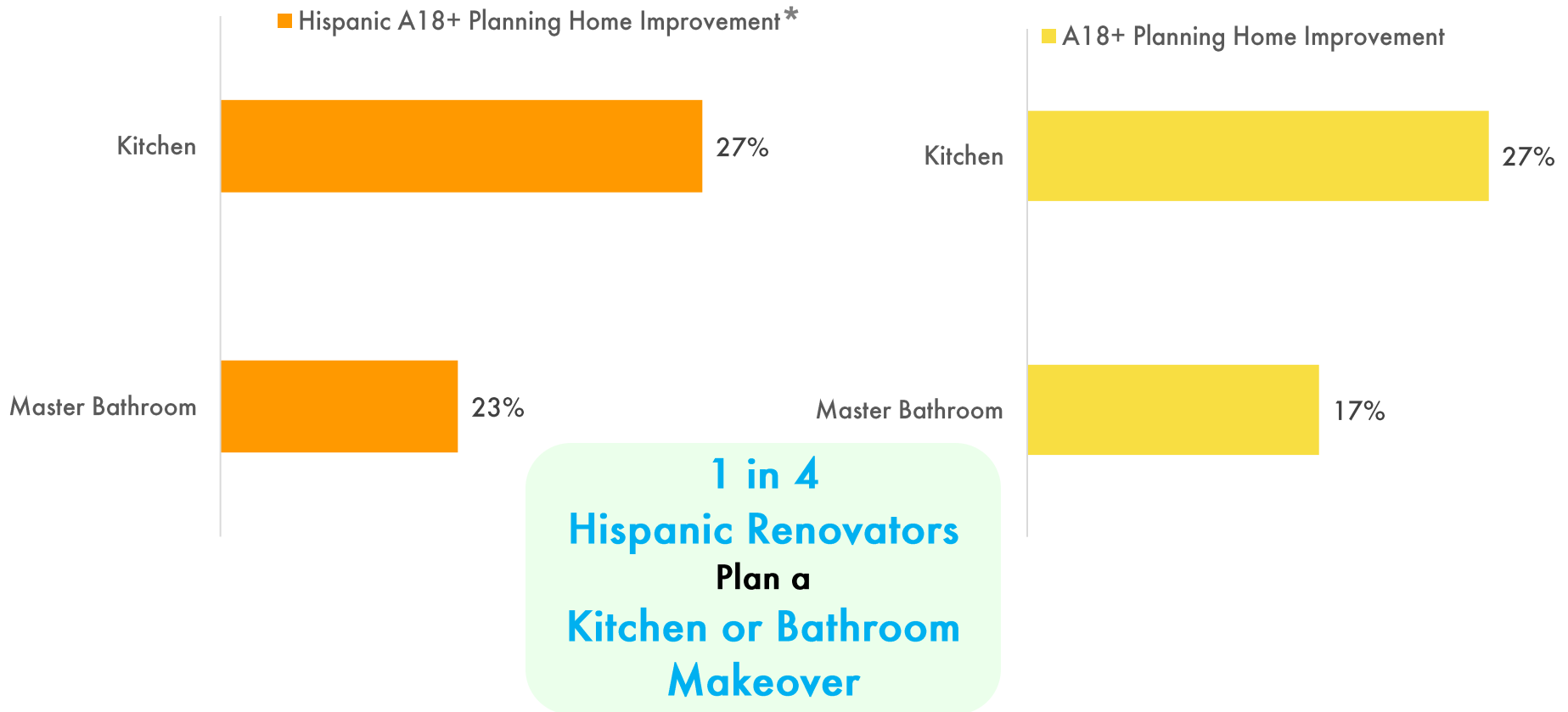
Hispanic Home Renovators Spend **\$374** Monthly on Lawn & Garden Products (vs. \$190 US Adults)



Kitchen Remodeling is the Most Popular Home Improvement Project

Hispanic Home Renovators are Also More Likely to be Planning a Bathroom Makeover

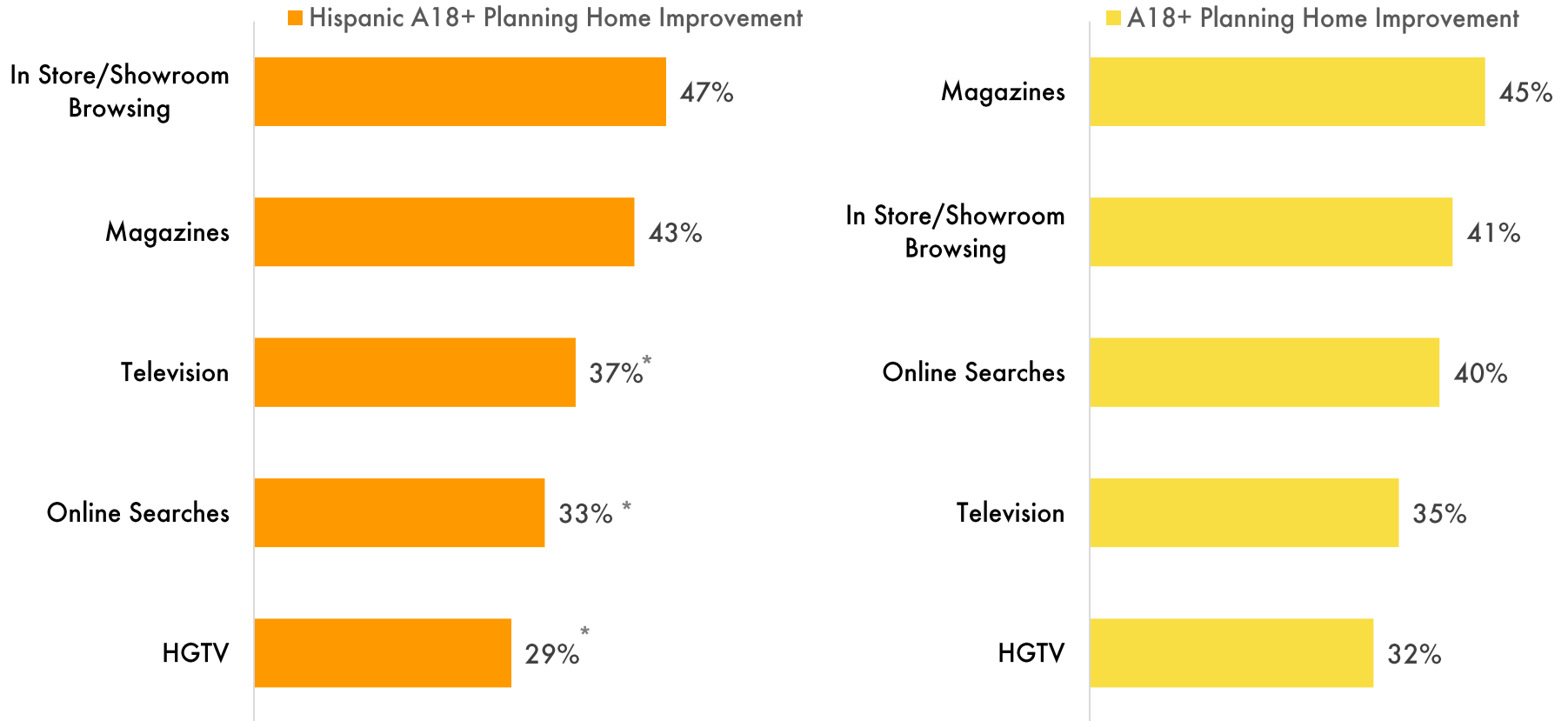
Which area in your home is most in need of a makeover or remodeling job?



*Low base size. Use directionally.

Hispanic Consumers Planning Home Improvement Get Their Ideas from Different Sources Compared to the General Renovating Population

Where do you look for design inspiration or ideas for your home?



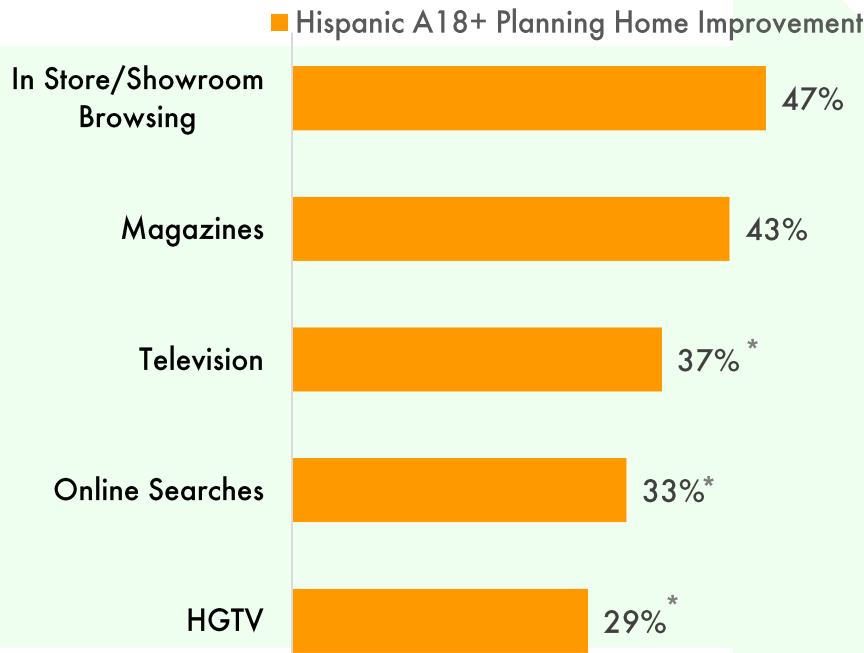
Social Media Inspires 26%* of Hispanic Renovators (vs. 19% of General Home Renovators) in their Home Improvement Ideas

*Low base size. Use directionally.

Sources of Design Inspiration Lead Hispanic Home Renovators to Search Online

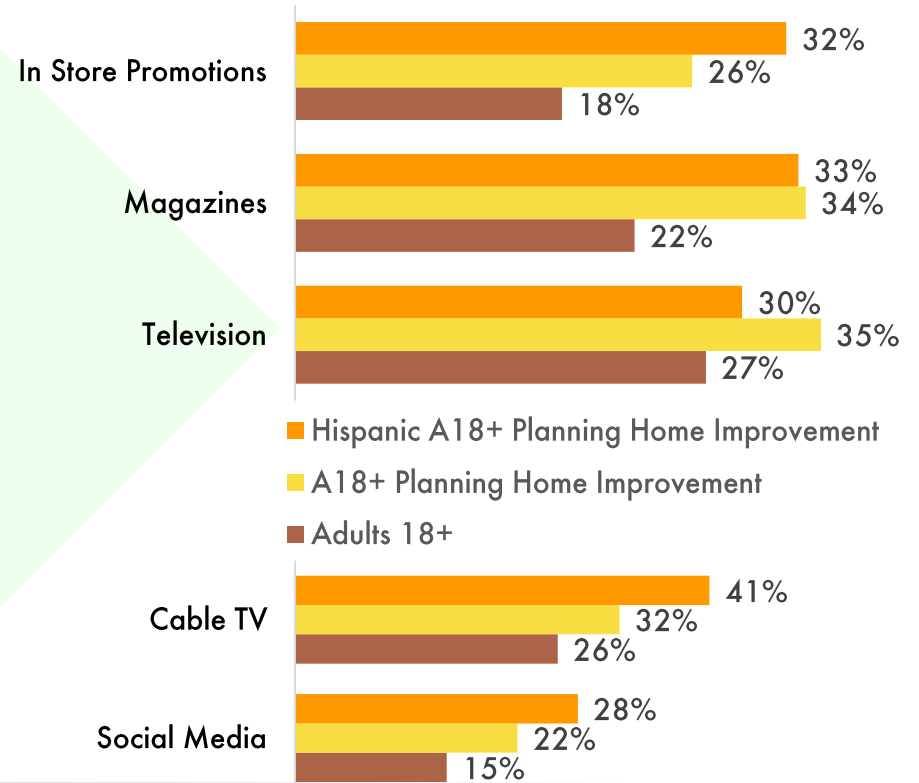
- Hispanic adults planning home improvement are more likely to search online after exposure to other media

Where do you look for design inspiration or ideas for your home?



Social Media inspires 26%* of Hispanic Renovators (vs. 19% of General Home Renovators)

What inspires you to do an online search?

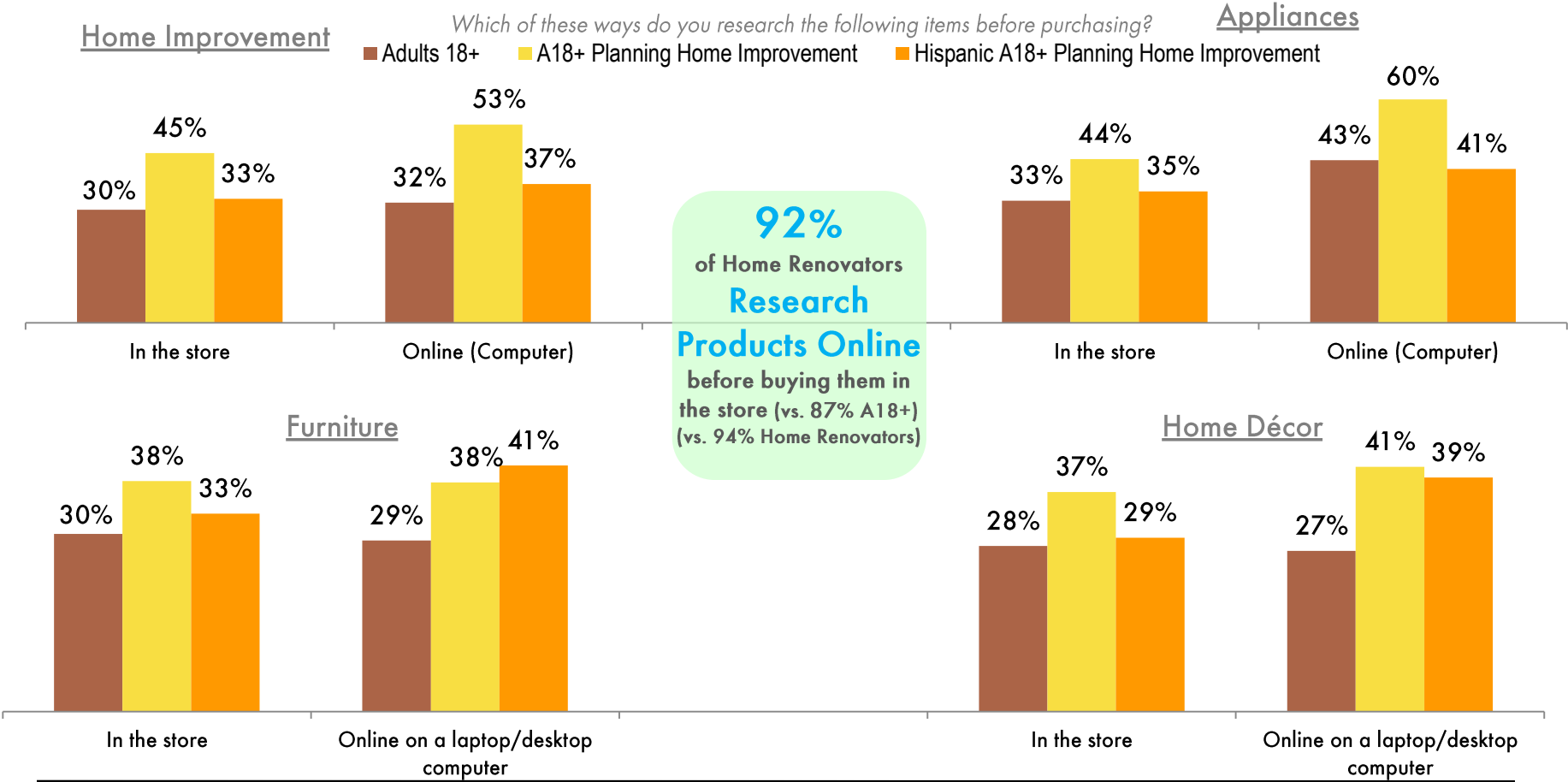


*Low base size. Use directionally.

Hispanic Consumers Seek Home Improvement Product Info Online

More Likely to Research Products Online Than by Visiting In Store, Providing Opportunities to See Digital Ads

- Although more likely than the general population, Hispanic home renovators are slightly less likely than general home renovators to research online



Hispanic Home Renovators are More Likely to Research Home Related Items on a Mobile Device Than General Home Renovators

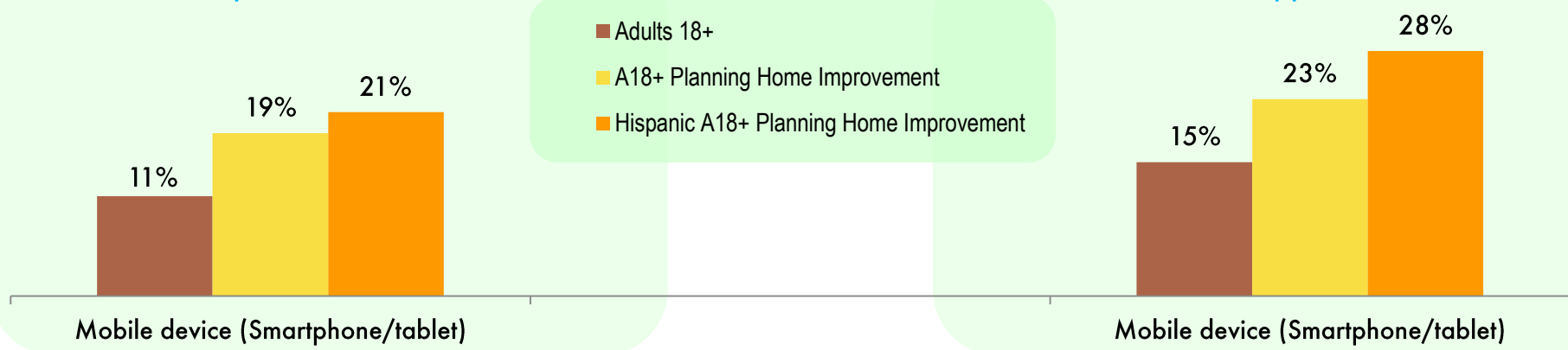
- Hispanic home renovators research home improvement products across devices
- Provides opportunities to see mobile ads

Which of these ways do you research the following items before purchasing? (Mobile Device)

Home Improvement

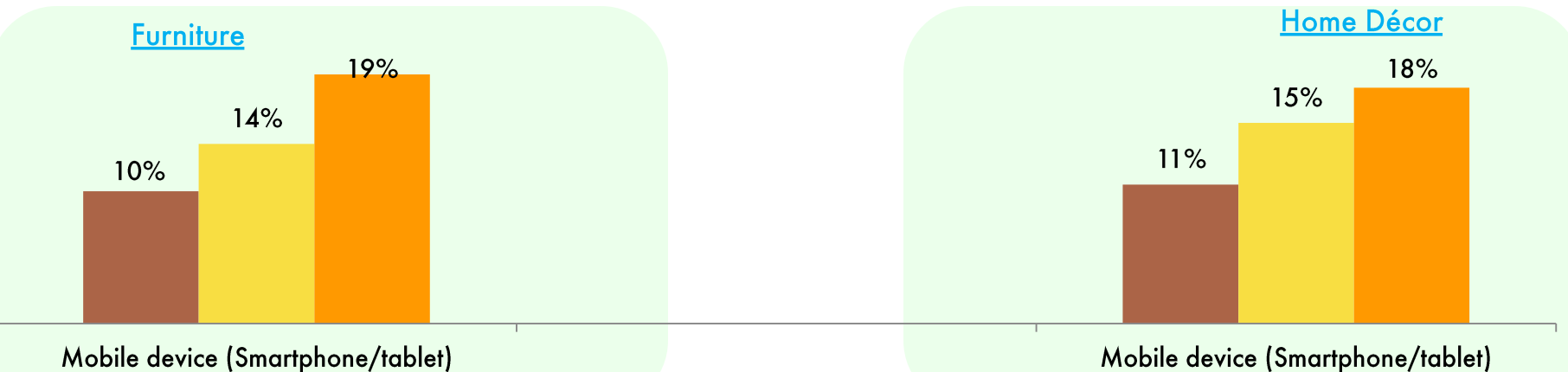
Appliances

- Adults 18+
- A18+ Planning Home Improvement
- Hispanic A18+ Planning Home Improvement



Furniture

Home Décor



Hispanic Home Renovators are Also More Likely to Buy Home Related Products on Mobile Devices

Than General Home Renovators

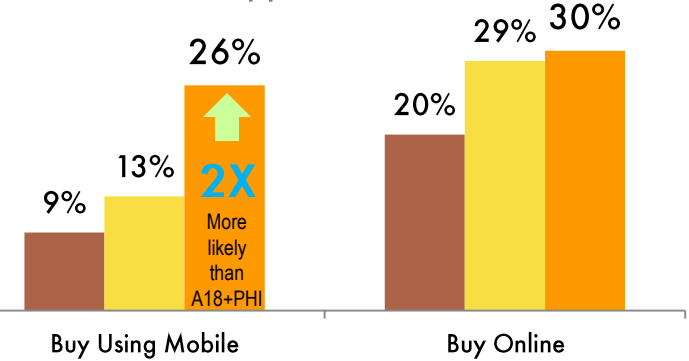
- While Hispanic home renovators also buy home related products online, they are less likely to do so than general home renovators, except for furniture.

■ Adults 18+ ■ A18+ Planning Home Improvement ■ Hispanic A18+ Planning Home Improvement

Home Improvement

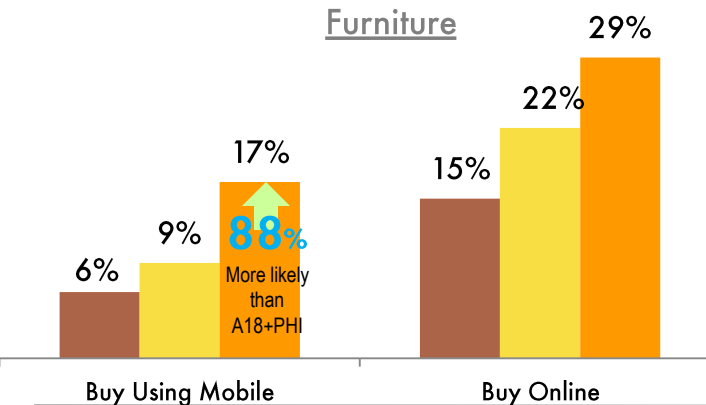


Appliances

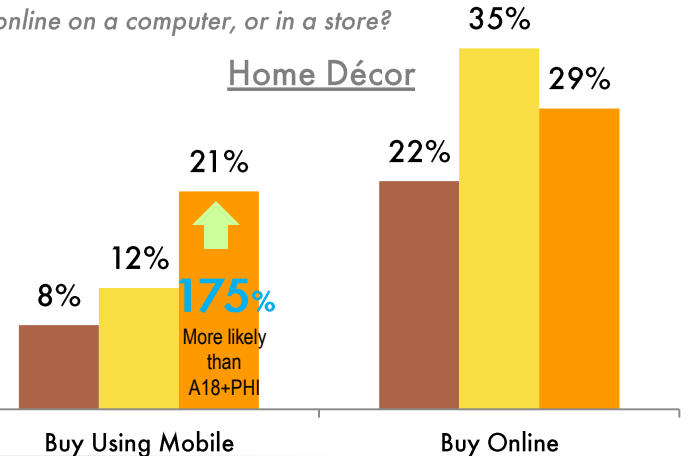


Have you ever purchased any of the following items on a mobile device, online on a computer, or in a store?

Furniture



Home Décor



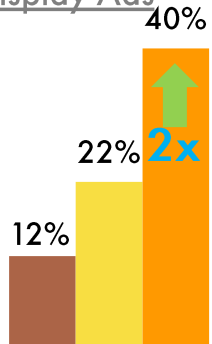
While Researching Online, Hispanic Home Renovators Encounter Digital and Mobile Ads

Which are **Much More Likely to Influence Their Home Improvement Purchases**

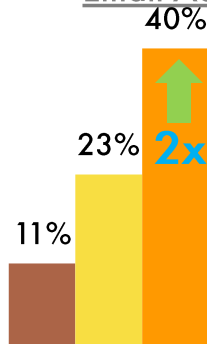
- Roughly one-third of Hispanic consumers planning home improvement are influenced in those purchases by any online or mobile advertising

Please tell us which of the following media influences your HOME IMPROVEMENT purchases:

Display Ads

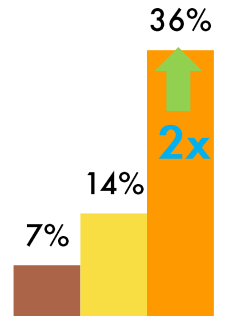
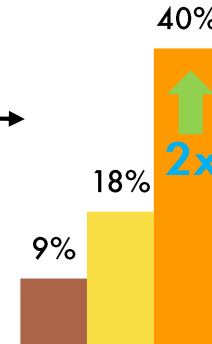


Email Ads



About **2x** More likely to be Influenced by Digital Media than Gen. Home Renovators

Social



Internet Advertising

Email Advertising

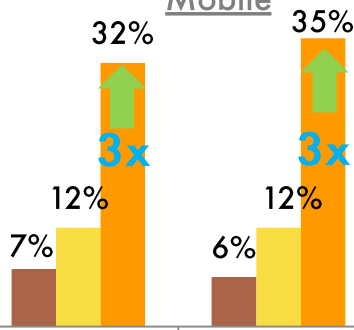
Social Media

Blogs

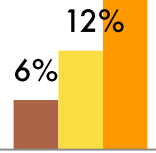
■ Adults 18+ ■ A18+ Planning Home Improvement ■ Hispanic A18+ Planning Home Improvement

Digital and Mobile Influence on Home Improvement Purchases:

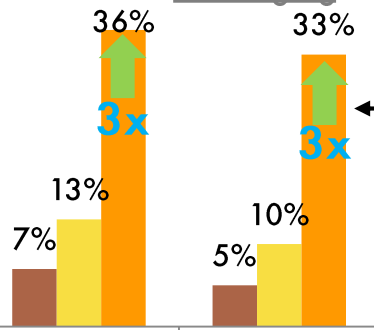
Mobile



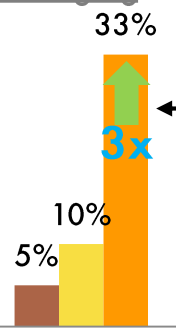
Mobile Video



Messaging

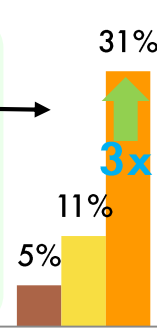


Instant Messaging (Computer)



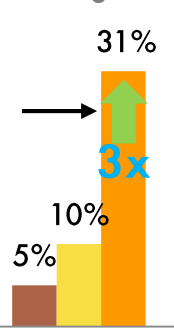
About **3x** More likely to be Influenced by Mobile Media than Gen. Home Renovators

Online Radio



Web Radio

Gaming Ads



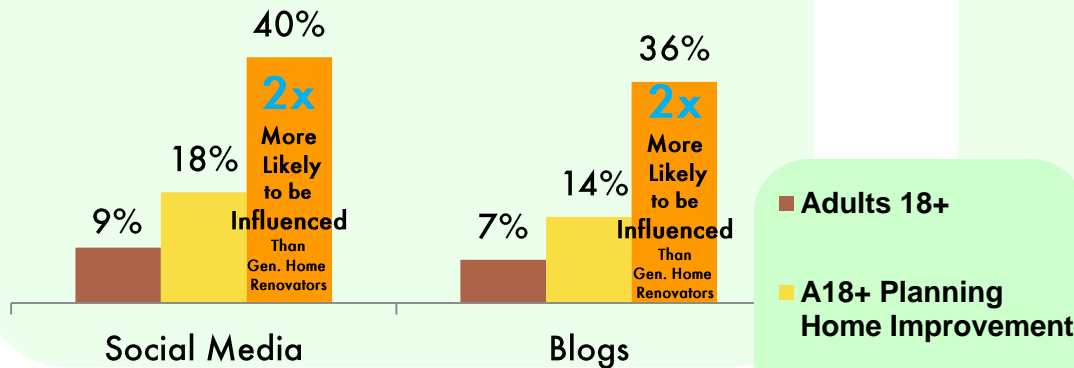
Online Video Game Advertising

Hispanic Home Renovators are Also More Influenced by Social Media

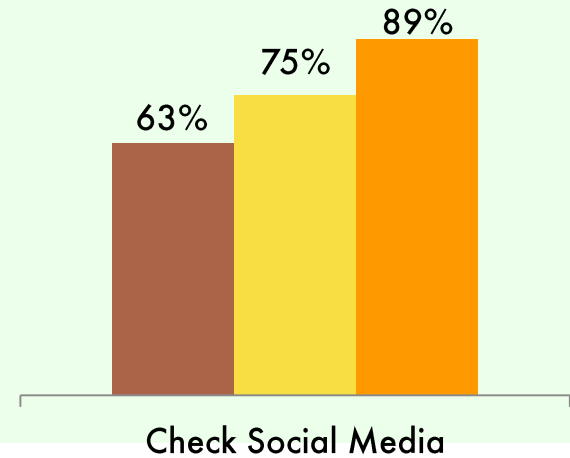
Than Either the General Public or General Home Renovators

- Hispanic Home Renovators are more likely to seek and give product advice from others, via social media, and are twice as influenced by social media in their home improvement purchases than general home renovators.

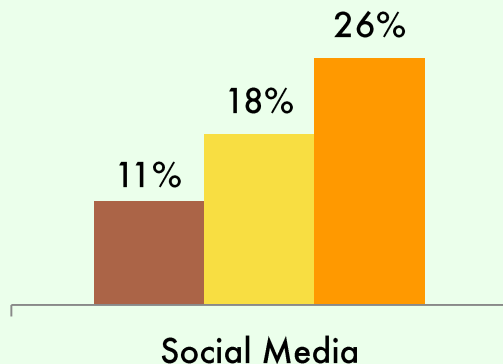
Social Media Influences Home Improvement Purchases



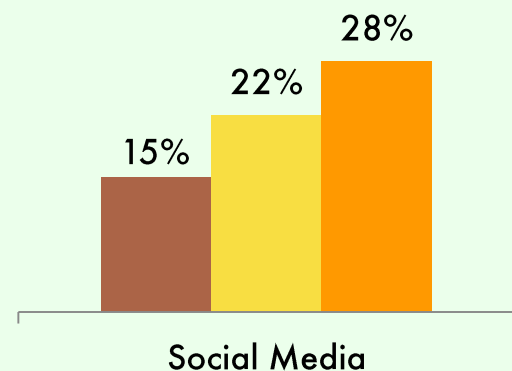
Social Media is Checked During an Average Week



Social Media Inspires Home Renovation Ideas



Social Media Triggers Online Search



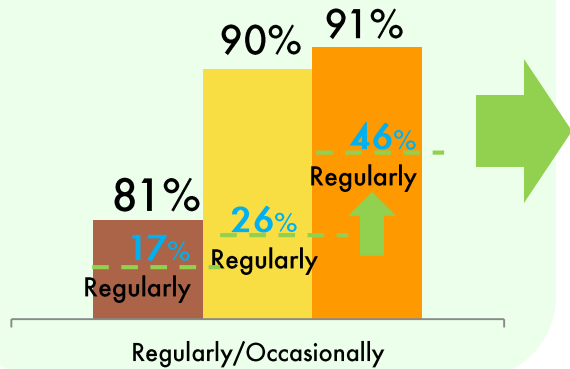
For HOME IMPROVEMENT PURCHASES, please tell us which of the following media influence your purchases (Social Media, Blogs), Where do you look for design inspiration or ideas for your home? During an average WEEK (MONDAY-SUNDAY), do you...? Which of the following triggers you to start an online search?

Half of Hispanic Home Renovators Regularly Seek (and Give) Others Product Advice

And They're Significantly Less Likely to do so Face to Face, Preferring Social Media

■ Adults 18+ ■ A18+ Planning Home Improvement ■ Hispanic A18+ Planning Home Improvement

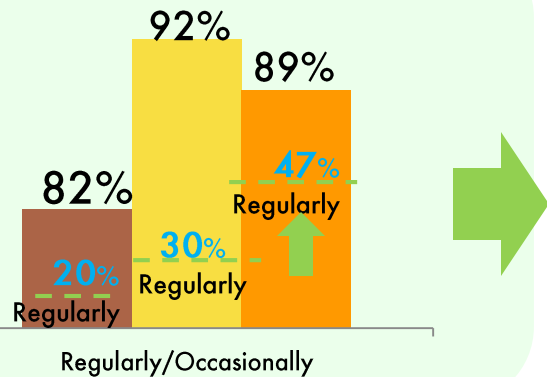
Seek Advice from Others Before Buying



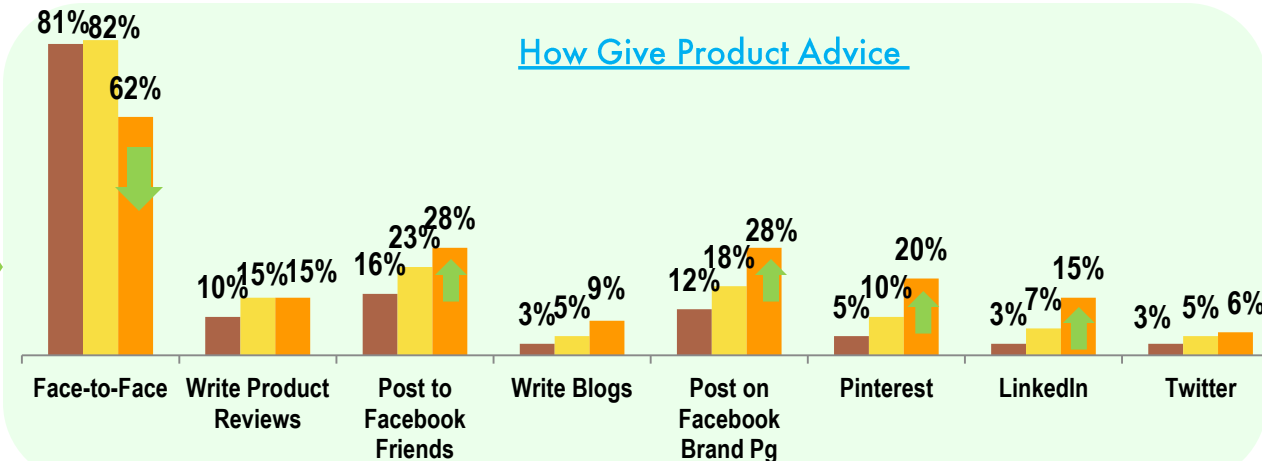
How Seek Product Advice



Give Product Advice to Others



How Give Product Advice

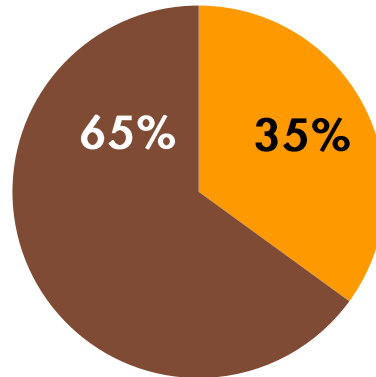


When you purchase products or services, do you seek/give advice from others before buying? (Regularly means routinely, as a set pattern; Occasionally means no set pattern, as mood suits)
 How do you seek/give advice from others about products and services before buying?

Hispanic Consumers Planning Home Improvement Speak Mostly English

Creating Opportunities to be Reached in Both English and Spanish Language Media

65% Speak English at Home More Than Half the Time

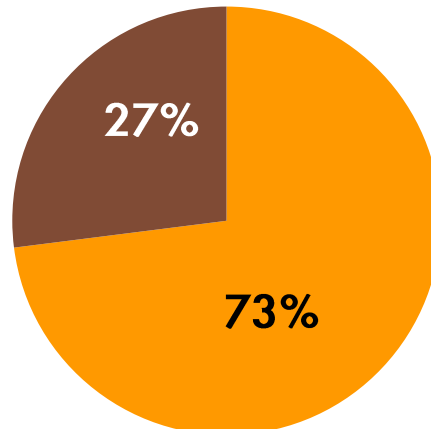


Hispanic Consumers Planning Home Improvement...

- Speak Spanish at Home Half the Time or More
- Speak English at Home More Than Half the Time

65% vs. 73% of Hispanic US Adults

...But Enjoy Spanish Language Media



Hispanic Consumers Planning Home Improvement...

- Consume Spanish Language Media Regularly or Occasionally (TV, Magazines, Internet, Radio, etc.)
- Don't Consume Spanish Language Media

73% vs. 59% of Hispanic US Adults

Do you use Spanish Language Media? (Regularly/Occasionally) (TV, Magazines, Internet, Radio, etc.)
(Regularly means routinely, as a set pattern; Occasionally means no set pattern, as mood suits)

IAB Digital Influence on Hispanic Consumers Planning Home Improvement, Aug. 2015

Summary and Implications

12% of US Adults who are planning to do a major home repair or renovation in the next 6 months are Hispanic Americans. While they share some similarities with general home renovators (like higher income and being married/living with partner), they differ in many ways, the most important of which is age. Hispanic consumers planning a home improvement project tend to be younger with 67% of them under age 45 (vs. 44% of general home renovators).

Similar, but different. Hispanic home renovators also shop differently. They may be planning the same renovations (kitchen and bath), but they tend to spend more overall on home improvement and lawn care products throughout the year. They also shop at their favorite home improvement and lawn & garden stores for different reasons: Price, Quality and Trustworthy Retailer are more important qualities to Hispanic home renovators than the general home renovating population when shopping their favorite home improvement store and Quality is a top concern for lawn and garden stores.

Digital and mobile savvy. Hispanic home renovators are much more likely to do any mobile activity and some digital activities (like web radio) than general home renovators and they are even more mobile and digital savvy than the general population. Hispanic home renovators go online to search and research product info at the same levels as the general home renovating population, but they are much more likely to do so using their mobile devices.

Hispanic home renovators are mobile first. They are more likely than general population home renovators to use their mobile devices not only to research home improvement products but also to buy them.

Summary and Implications

Digital and mobile media and ads influence Hispanic home renovators. Hispanic home renovators are roughly twice as likely to be influenced by digital media and ads than general home renovators and three times as likely to be influenced by mobile media and ads in their home improvement purchases.

Strong social media influence. Hispanic home renovators are over four times more likely than the general population and twice as likely as the general home renovating population to be influenced by social media in their home improvement purchases. Social media is an important influence on this group's purchases, both in seeking product advice and sharing it. Hispanic consumers planning home improvement are much more likely than the general home renovating population (and the general population) to use social and other digital and mobile media both to seek and give product advice. Interestingly, Hispanic home renovators are less likely to seek advice from product reviews than the general home renovating population unless they are in the store, at which point Hispanic home renovators are much more likely to use their mobile phones to read product reviews to decide between products.

Primarily English speakers who enjoy Spanish language media. Clearly, digital media is the place to reach Hispanic home renovators with a special emphasis on mobile media. In addition, Hispanic home renovators regularly watch, read and listen to Spanish language media even though English is their primary language. This combination provides a fertile advertising environment for both English and Spanish language media in which to reach these valuable consumers. A balanced media mix in both environments with a focus on digital and especially mobile advertising would likely be successful in reaching Hispanic home renovators and capturing some of those home improvement product dollars.

IAB

Digital Influence on Home Improvement Plans

With a Section on Hispanic Consumers Planning Home Improvement

Questions?

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Research Director, IAB

Kristina@IAB.net

Aug. 2015