Ipsos iris Home & Garden

May 2023

Key Objectives

1 PLANNING

Understand the seasonality of the Home and Garden category and how this can inform content, marketing and sales planning

2 PROFILING

Understand the audience for the Home and Garden category -- for both retailers and content creators

3 PARTNERSHIPS

Understand how you can reach these shoppers – online and offline – and how to demonstrate the value of partnerships

4 PURCHASING

Understand how Home and Garden content provides the perfect means of reaching an audience of engaged, intentional Home and Garden shoppers

Homes & Garden sites reach 31 million visitors a month

Total internet audience

49.9m

Home & Garden

30.9m

Home & Garden – Retail sites

26.7m

Retailers like B&Q, Dunelm, IKEA etc

Home & Garden – Lifestyle sites

17.0m

Content producers like Ideal Home, BBC Gardeners World magazine, Homes and Garden etc

Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Home & Garden: Retail

Key Objectives

1 PLANNING

Understand the seasonality of the Home and Garden retail category and what drives key sales periods

2 PROFILING

Understand the audience for Home and Garden retailers

3 PARTNERSHIPS

Understand how you can reach these shoppers – online and offline – and how to demonstrate the value of partnerships

4 COMPETITION

Understand the Home and Garden market: who are the biggest retailers, who has the biggest exclusive audience and the differences between brands

Homes & Garden retail sites reach over 26 million visitors a month

Total internet audience

49.9m

Home & Garden

30.9m

Home & Garden – Retail sites

26.7m

Retailers like B&Q, Dunelm, IKEA etc

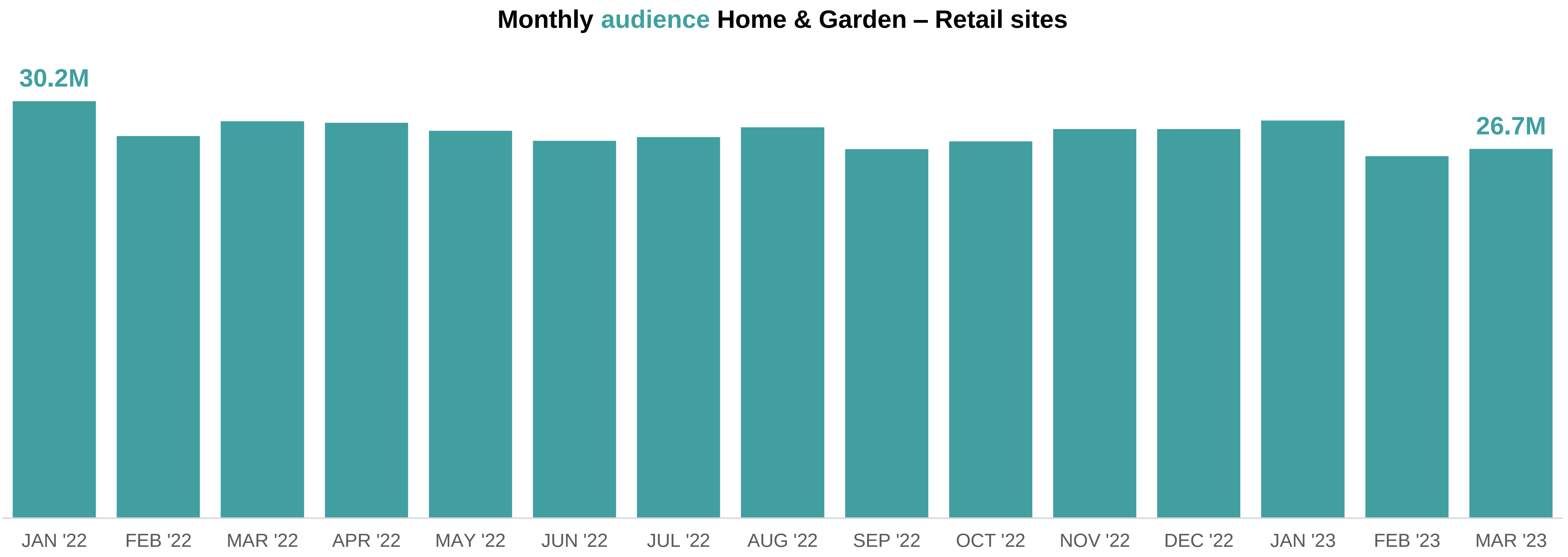
Home & Garden – Lifestyle sites

17.0m

Content producers like Ideal Home, BBC Gardeners World magazine, Homes and Garden etc

Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

The audience for Home & Garden retail sites peaked in January 2022

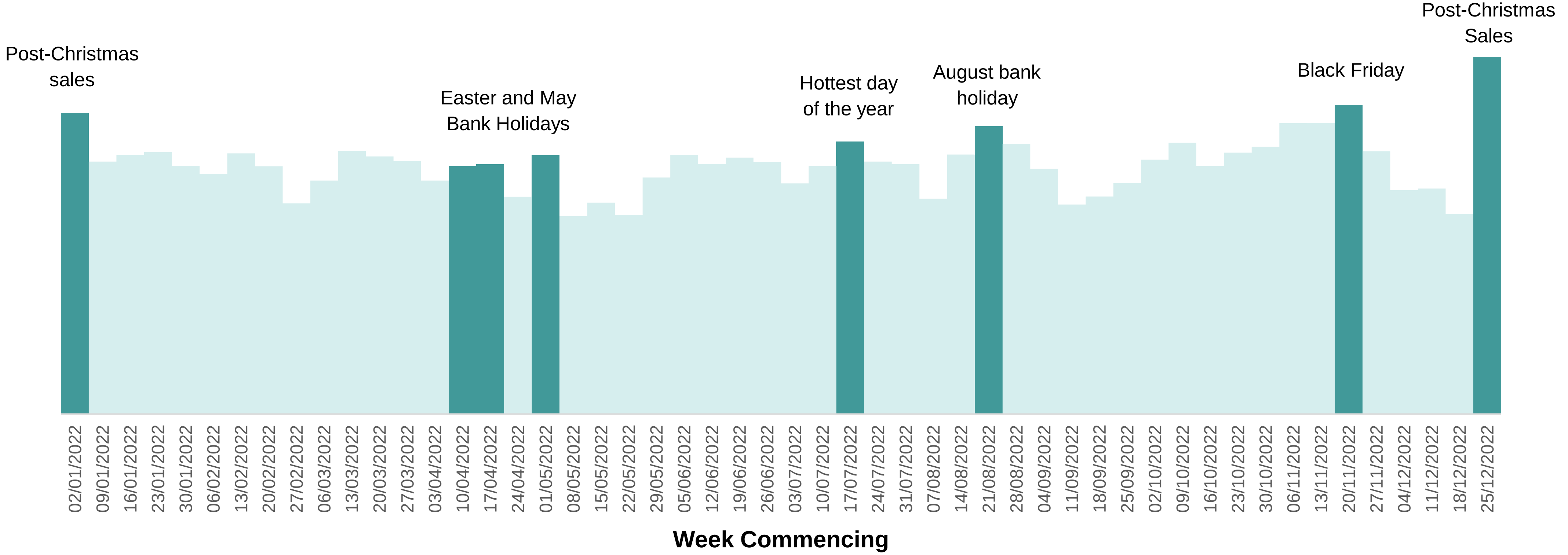


Source: Ipsos iris Online Audience Measurement Service, January 2022 - March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Sales and bank holidays drive spikes in engagement throughout the year

Marketing plans can be optimised around key periods like the Spring and Summer bank holidays, and pre and post-Christmas sales, to capitalise on increased interest and activity in the category.

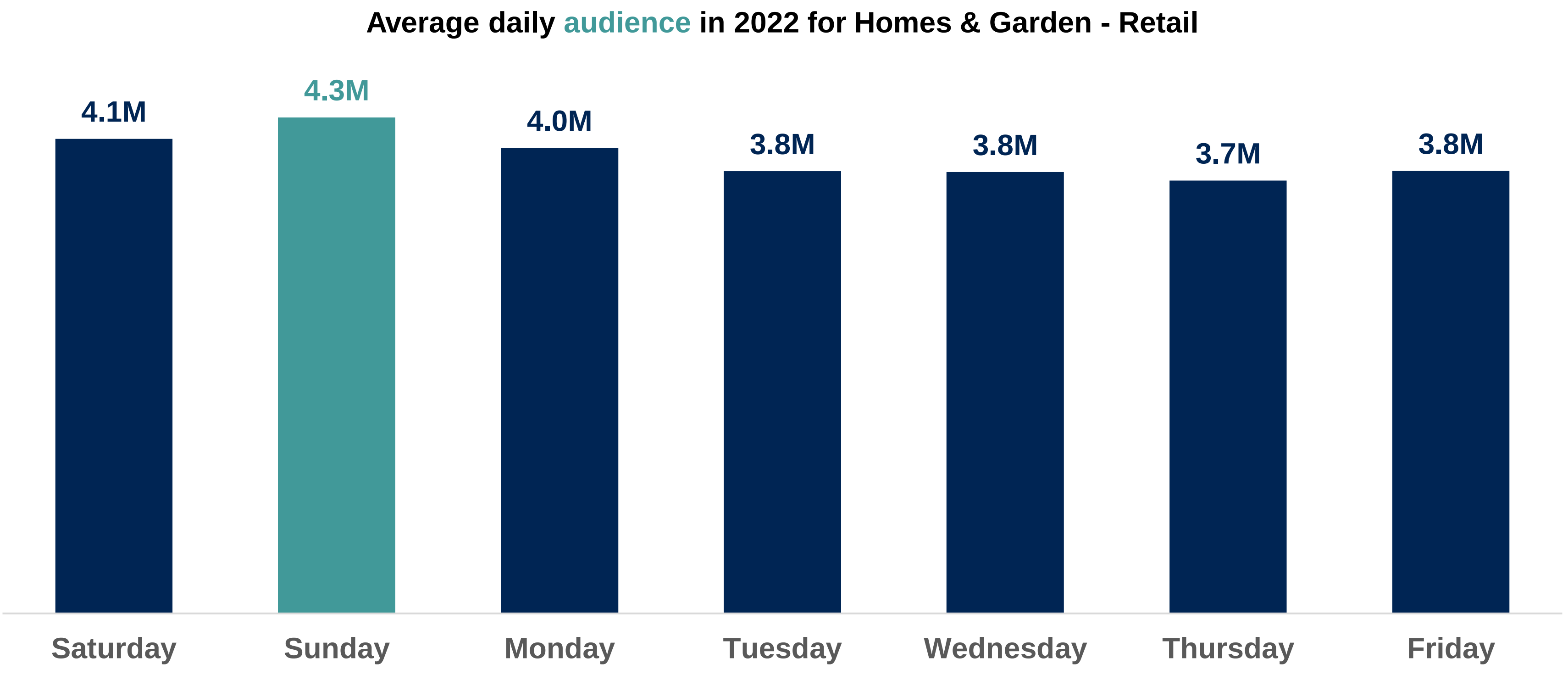
Total time spent for Home & Garden – Retail sites



Source: Ipsos iris Online Audience Measurement Service, January - December 2022, All aged 15+ using PC/laptop, smartphone or tablet device(s).

The most common day for visiting Home & Garden retail sites is Sunday

Social and CRM strategy can be built around key days for retailers, to optimise comms planning. How does this fit with your in-store activity?



Source: Ipsos iris Online Audience Measurement Service, January - December 2022, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Home & Garden shoppers skew older and female, but have average income

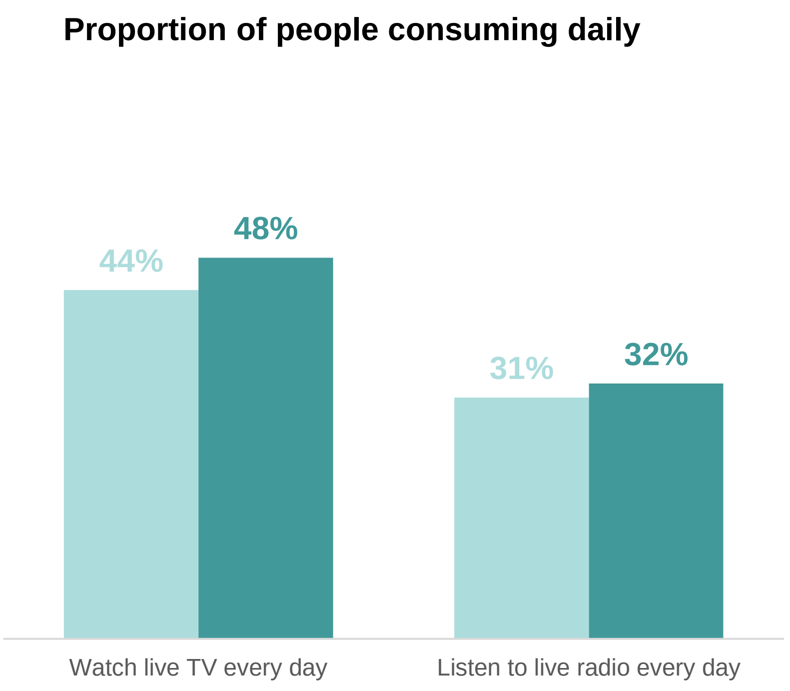
Is your marketing built to capture this audience? Is your brand similar or is your audience different? How can you drive differentiation?

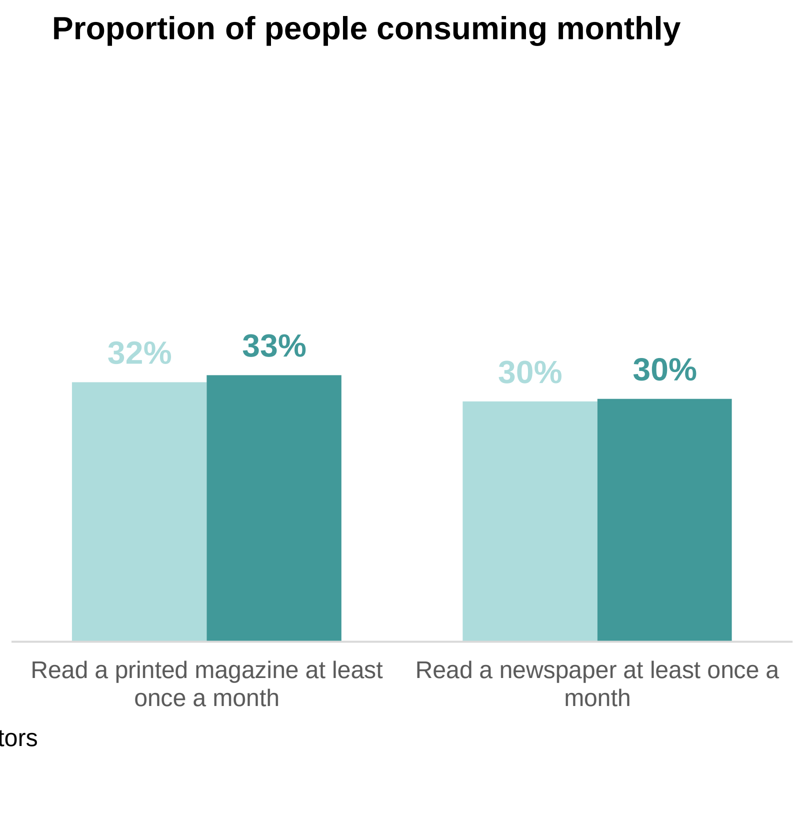
	Female	Aged 55+	Earn £50k+	Children in the house
Homes & Garden **Retail** visitors	**56%**	**39%**	**18%**	**30%**
Total internet users	**50%**	**34%**	**18%**	**31%**

Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Offline, they are heavier viewers of TV and heavier readers of magazines

Home & Garden retail visitors are bigger consumers of all media, but there is a particularly strong case for including TV on your media plan.



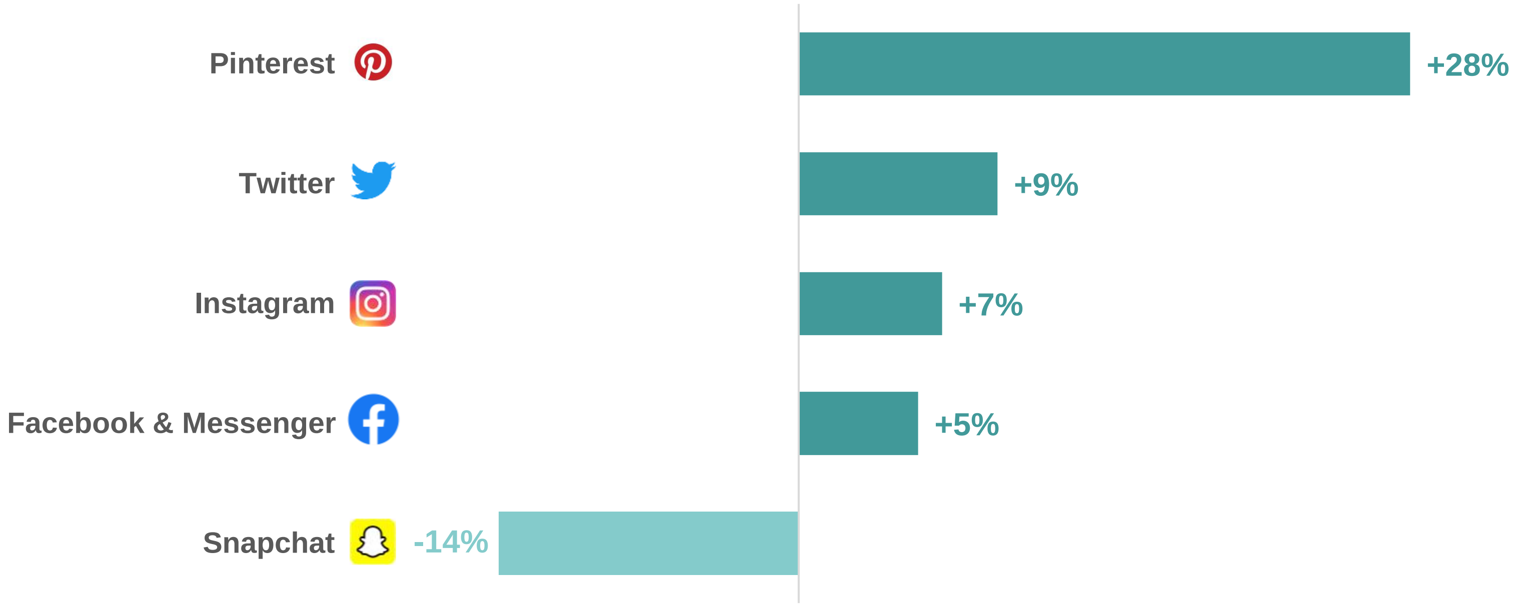


Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Online, they are more likely to visit most social media, and have a particular affinity for Pinterest

There is a close affinity between Pinterest and the home and garden retailers: is it the same for your brand? Which platform is the best fit?

Likelihood of Home & Garden visitors to visit social media sites vs average internet user

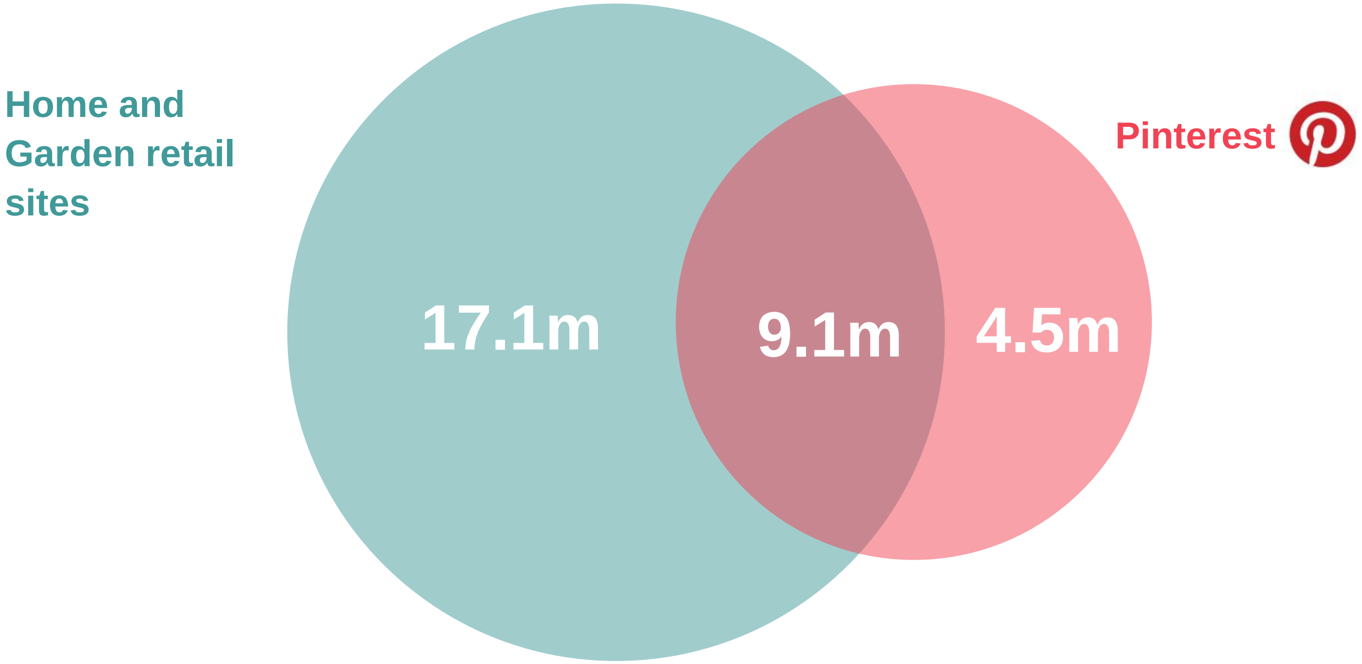


Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Home & Garden retail sites and Pinterest have a shared audience of almost nine million

There is potential for a mutually beneficial partnership that delivers both engagement for Pinterest and conversions for retailers.

Cross audience for Home & Garden retailers and Pinterest



Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

This shared audience is significantly more likely to be younger, female and say they decorate regularly

This shared audience has the potential for more specific targeting: both in terms of demographics and interest in the category.

	Female	Aged 55+	Earn £50k+	Children in the house	Change decorations as often as possible
Home & Garden **Retail** + **Pinterest** visitors	**69%**	**33%**	**17%**	**32%**	**10%**
Home & Garden **Retail** visitors	**56%**	**39%**	**18%**	**30%**	**8%**
Retail + **Pinterest** vs **Retail** only	**+23%**	**-14%**	**-18%**	**+7%**	**+14%**

Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

B&Q is the most visited retailer in the Home & Garden category…

In terms of audience, IKEA is the closest competitor to B&Q: where does your brand sit in the market? Who are your closest competitors?

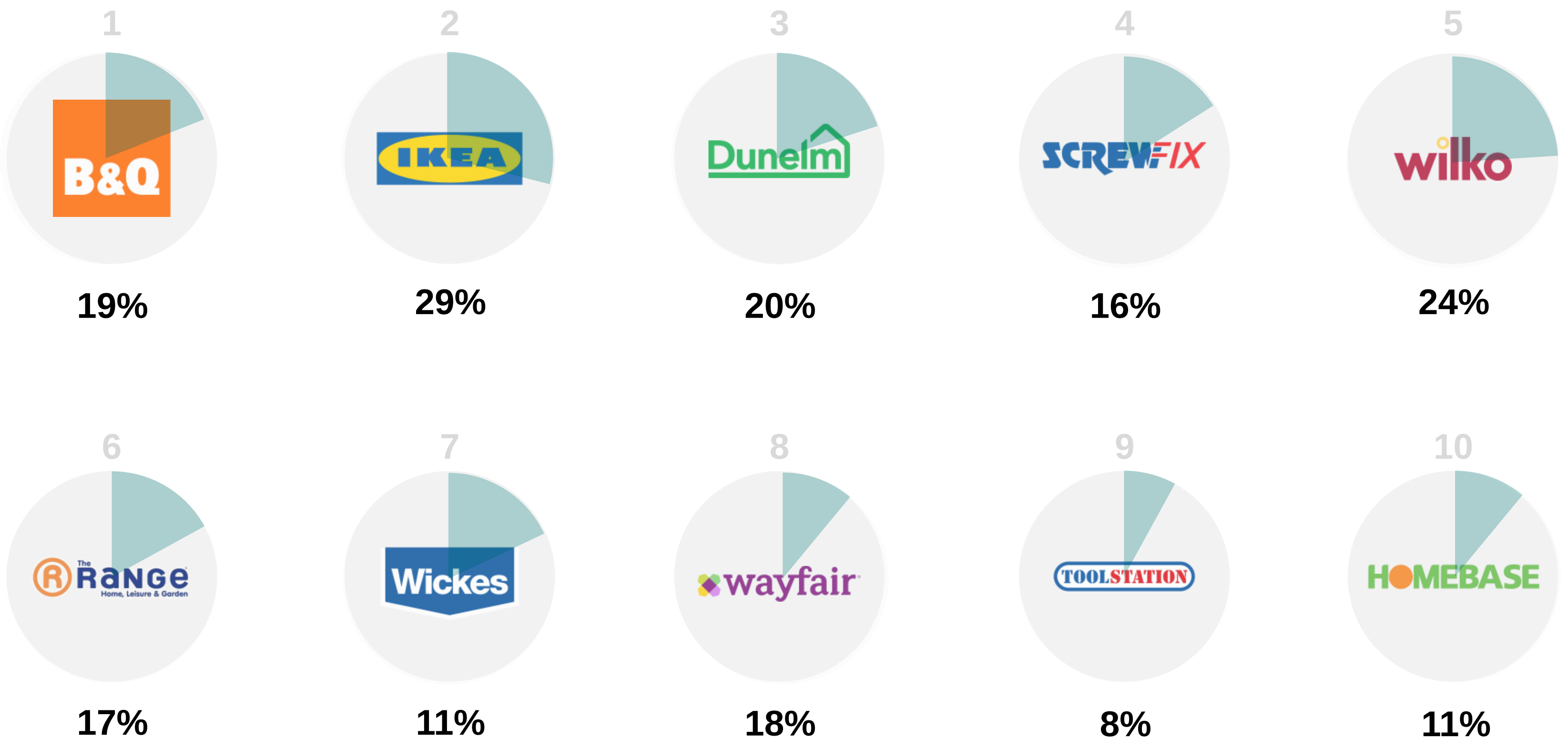
1	B&Q	7.9m
2	IKEA	6.7m
3	Dunelm	6.5m
4	SCREWFIX	5.9m
5	wilko	4.8m
6	The Range Home, Leisure & Garden	3.7m
7	Wickes	3.1m
8	wayfair	3.0m
9	TOOLSTATION	2.8m
10	HOMEBASE	2.4m

Top 10 Home & Garden retailers

Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

…But IKEA has the largest share of exclusive visitors

IKEA has the most loyal customer base. B&Q, Homebase and Wickes all have broadly similar brands, but B&Q has done significantly better at cultivating an exclusive audience – what is B&Q doing that the others aren't?

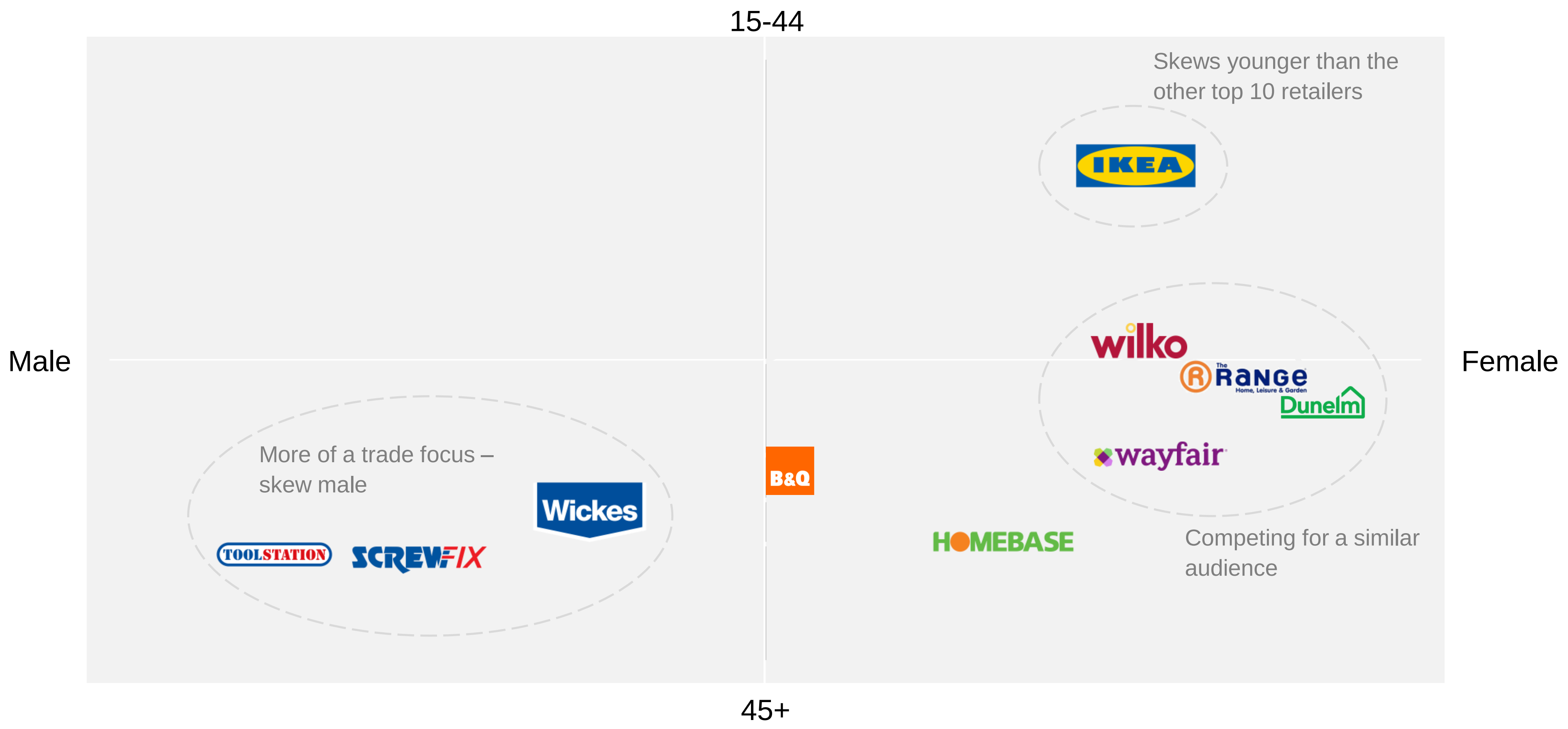


Percentage of visitors that <u>only</u> visit this brand out of the top 10 Home & Garden retailers

Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Most brands skew older and female, except those with a more trade focus

Wilko, The Range, Dunelm and Wayfair are competing for similar audiences and will need to differentiate to gain market share.

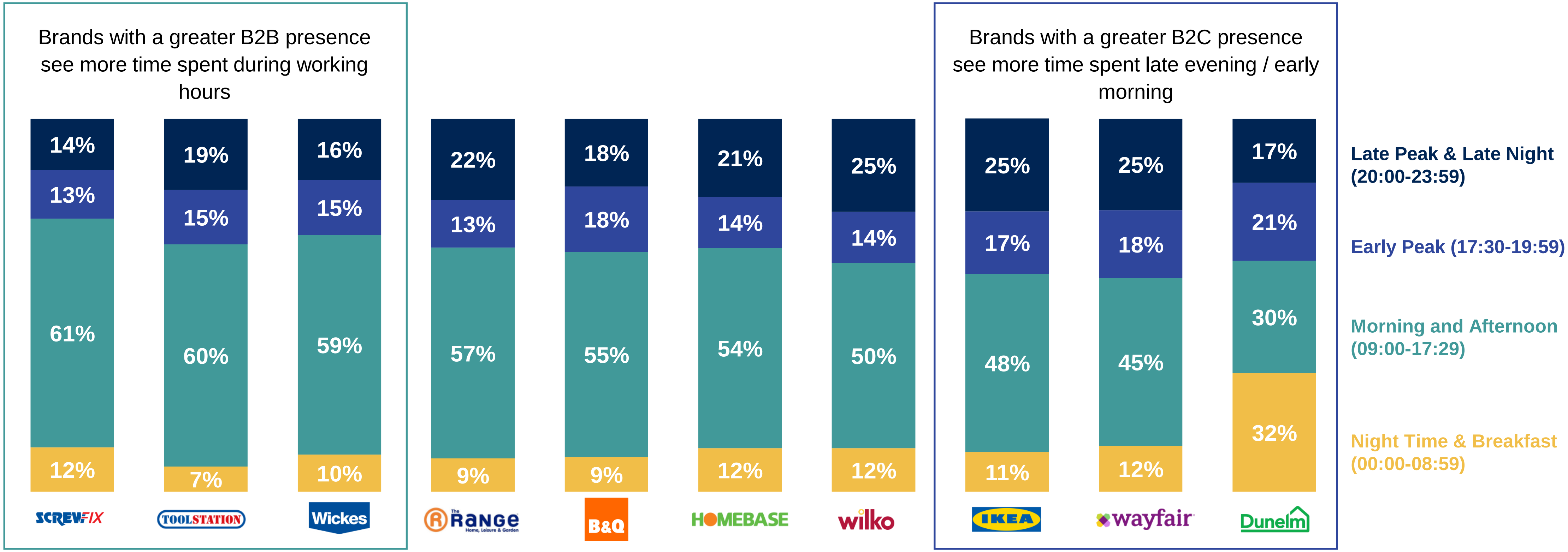


Indexed versus the average internet user.
Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Brands that sell to trade are more likely to be visited during working hours

Engagement will be harder to drive in the evening for Screwfix, Toolstation and Wickes. Social activity can either be built around these patterns or used to try and shift engagement.

Minutes share by day part for the top ten Home & Garden retail brands



Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Key takeaways - Retail

PLANNING: BANK HOLIDAYS ARE KEY

Home & Garden retailers see some the highest engagement around key sales periods – Black Friday, Boxing Day Sales – as well as around Bank Holidays. **How do you optimise your media and content plans to ensure you're maximising audience and engagement?**

PROFILING: OLDER AND FEMALE

Retailers skew towards an older female audience. We know they are heavier TV viewers and magazine readers, **but how else can you build reach among this audience?**

PARTNERSHIPS: PINTEREST OF INTEREST

The audience for Home & Garden retailers has a high affinity with Pinterest: their cross audience is female, younger and into decorating. **Which social media platform best fits your brand? How can you use these synergies to create a more valuable audience?**

PLANNING: DAYTIME VS EVENING

Shopping varies by daypart across brands: a more business focus drives business-hours visitation. **How can you ensure your contact strategy is optimised around your customers – and your competitors?**

Home & Garden: Lifestyle

Key Objectives

1 PLANNING

Understand the seasonality of Home & Garden content and the opportunities with retail

2 PROFILING

Understand the audience for Home & Garden content and how it compares to retail

3 PURCHASING

Understand the how Home & Garden content visitors are an intentional audience and are more likely to visit Home & Garden retail sites

4 MARKET

Understand differences in audience and engagement across Home & Garden content sites

Home & Garden lifestyle sites reach 17m visitors a month

Total internet audience

49.9m

Home & Garden

30.9m

Home & Garden – Retail sites

26.7m

Retailers like B&Q, Dunelm, IKEA etc

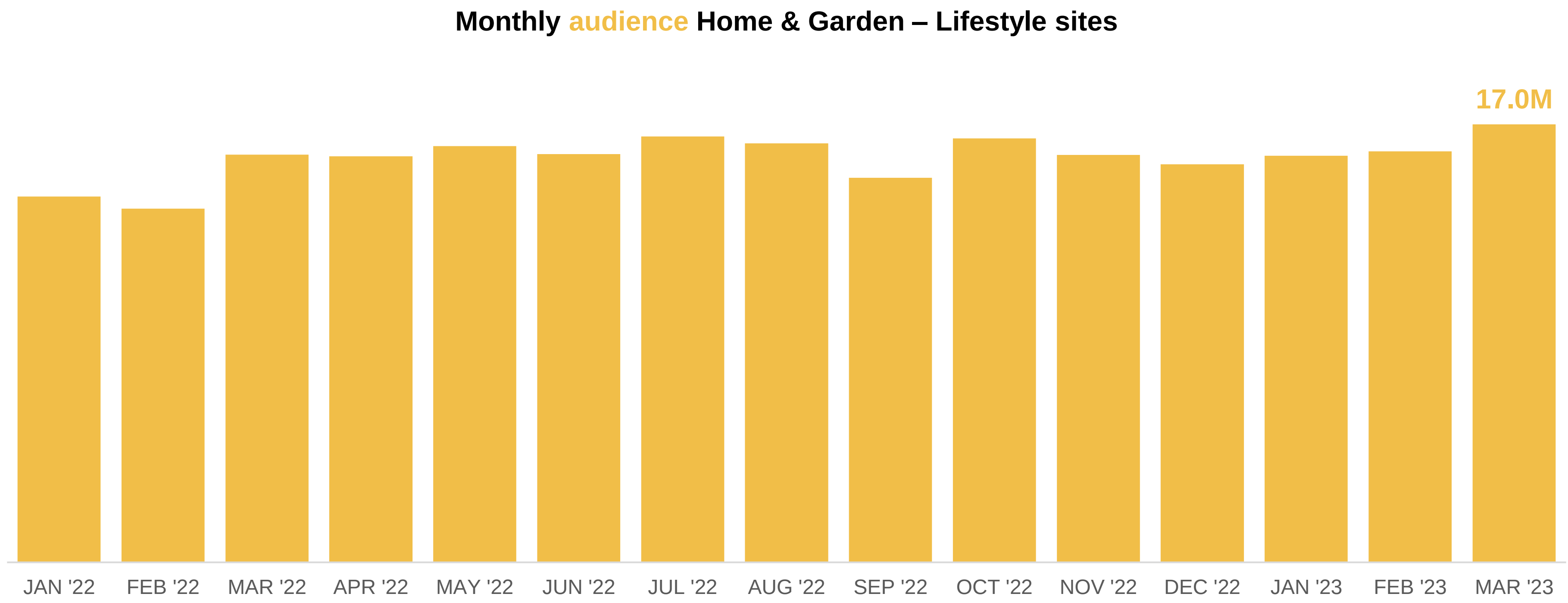
Home & Garden – Lifestyle sites

17.0m

Content producers like Ideal Home, BBC Gardeners World magazine, Homes and Garden etc

Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

The audience for Home & Garden lifestyle sites peaked in March 2023

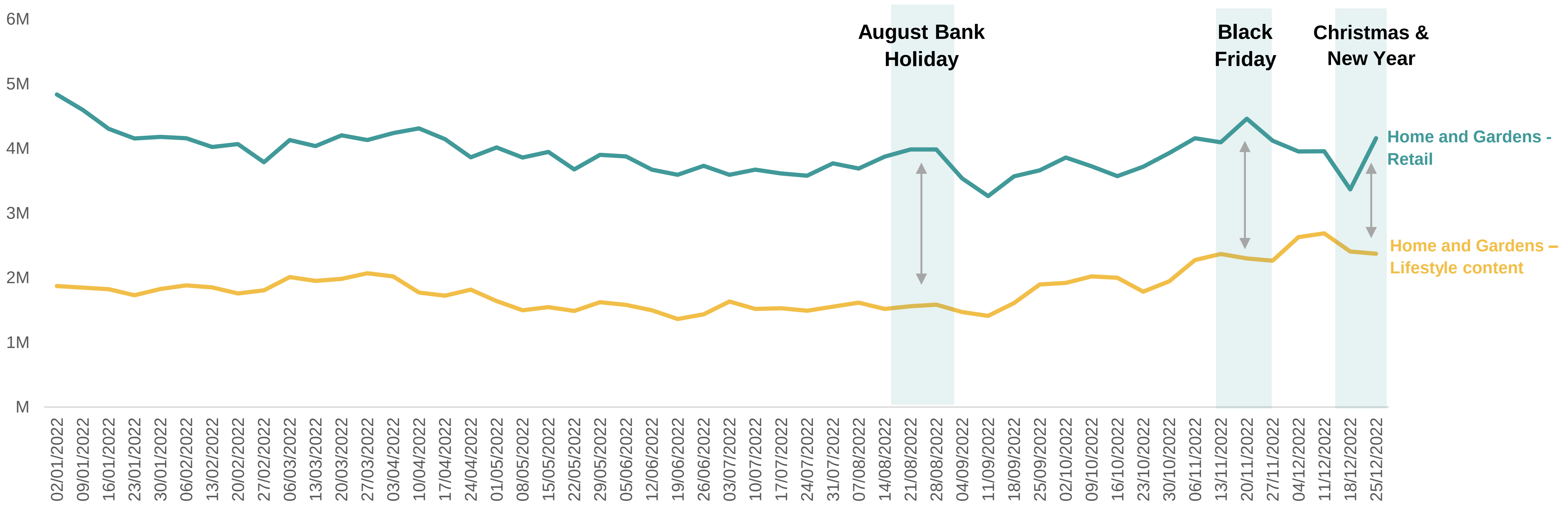


Source: Ipsos iris Online Audience Measurement Service, January 2022 - March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Peaks in retail activity are not always matched by interest in content

There is opportunity in August and November/December to unlock interest in the Home & Gardens category and make content work harder.

Weekly audience Home & Garden – Lifestyle sites



Source: Ipsos iris Online Audience Measurement Service, January – December 2022, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Home & Garden lifestyle visitors are older and less likely to have children in the household

Messaging and content can be tailored to this older audience to maximise effectiveness.

	Female	Aged 55+	Earn £50k+	Children in the house
Home & Garden **Lifestyle** visitors	**56%** =	**42%** ▲	**18%** =	**29%** ▼
Home & Garden **Retail** visitors	**56%**	**39%**	**18%**	**30%**
Total internet users	**50%**	**34%**	**18%**	**31%**

Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Home & Garden content visitors are significantly more likely to visit Home & Garden retail sites – particularly the top ten retailers

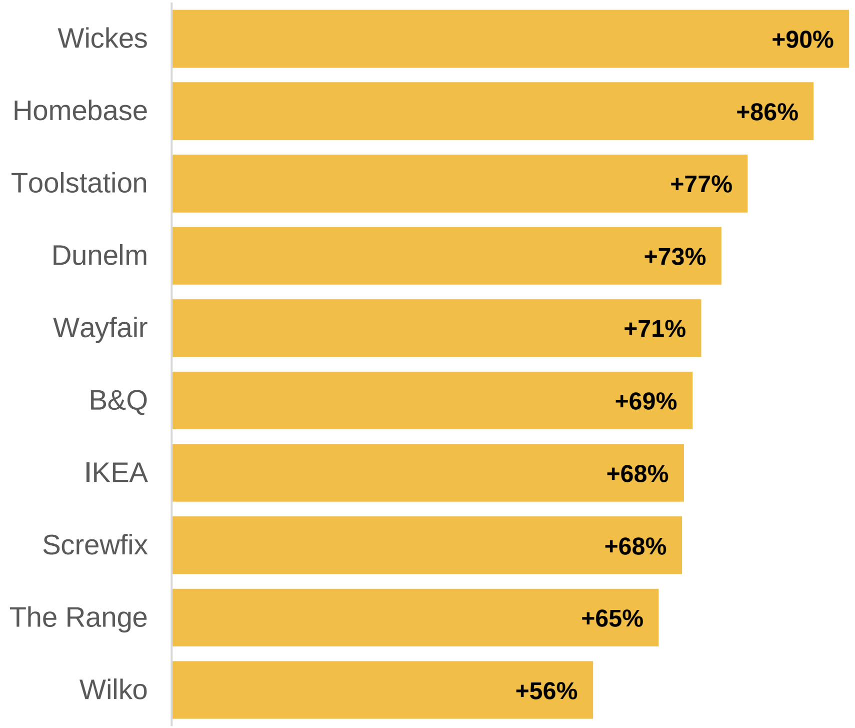
Home & Garden content provides a community of intentional visitors: they go on to shop with the biggest names in the category.

Home & Garden content visitors are

+42%

More likely to visit Home & Garden retail sites

Home & Garden content visitors vs average internet user



Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

RHS is the lifestyle brand with the most visitors in the Home & Garden category

Top 10 Home & Garden lifestyle brands

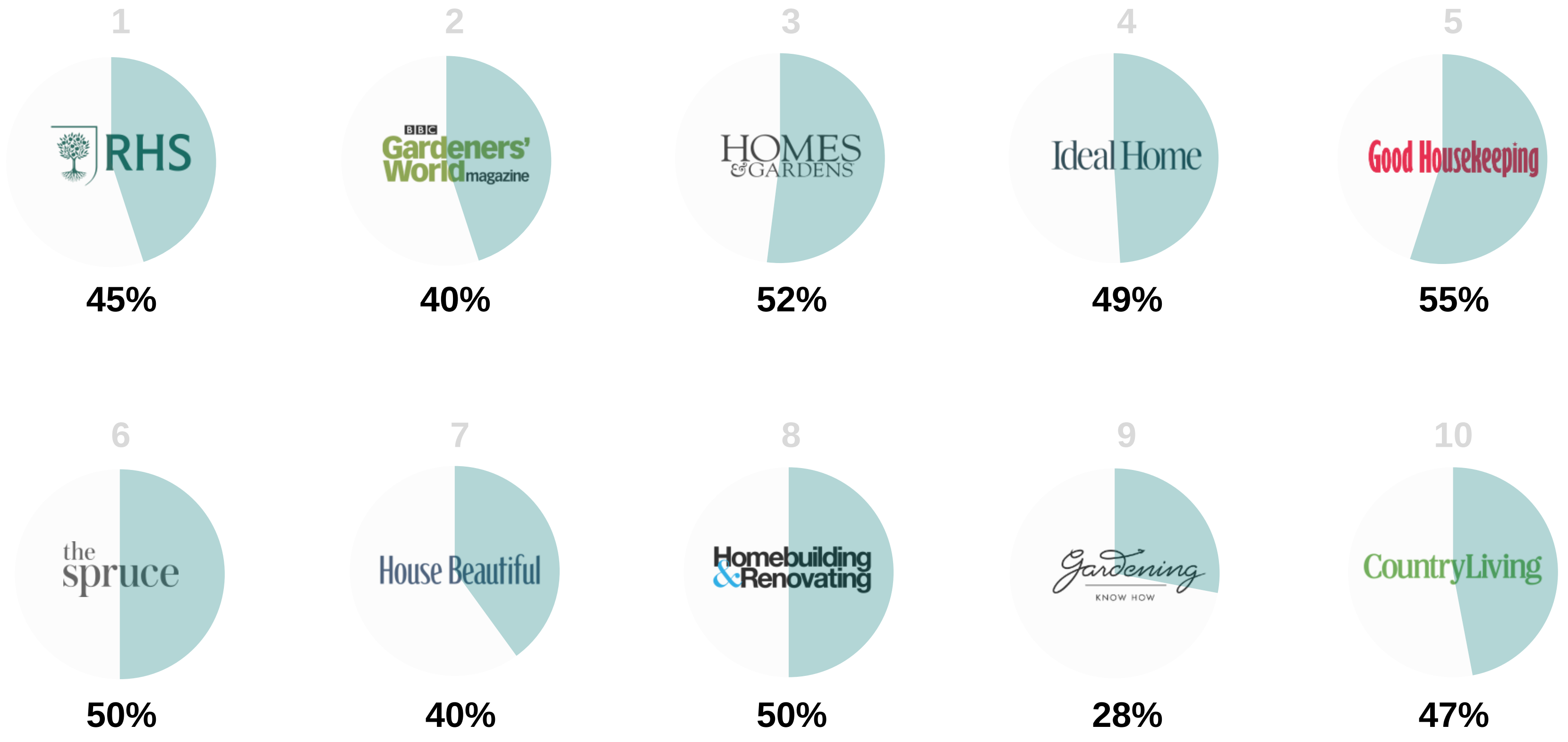
1	RHS	2.2m
2	BBC Gardeners' World magazine	2.1m
3	Homes & Gardens	1.6m
4	Ideal Home	1.6m
5	Good Housekeeping	1.4m
6	the spruce	0.9m
7	House Beautiful	0.8m
8	Homebuilding & Renovating	0.8m
9	Gardening Know How	0.8m
10	Country Living	0.6m

Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Ipsos

Good Housekeeping has the highest share of exclusive visitors

Home & Garden lifestyle sites have a higher proportion of exclusive visitors than retail sites: advertisers will need to find the titles that reach the right audience for them.

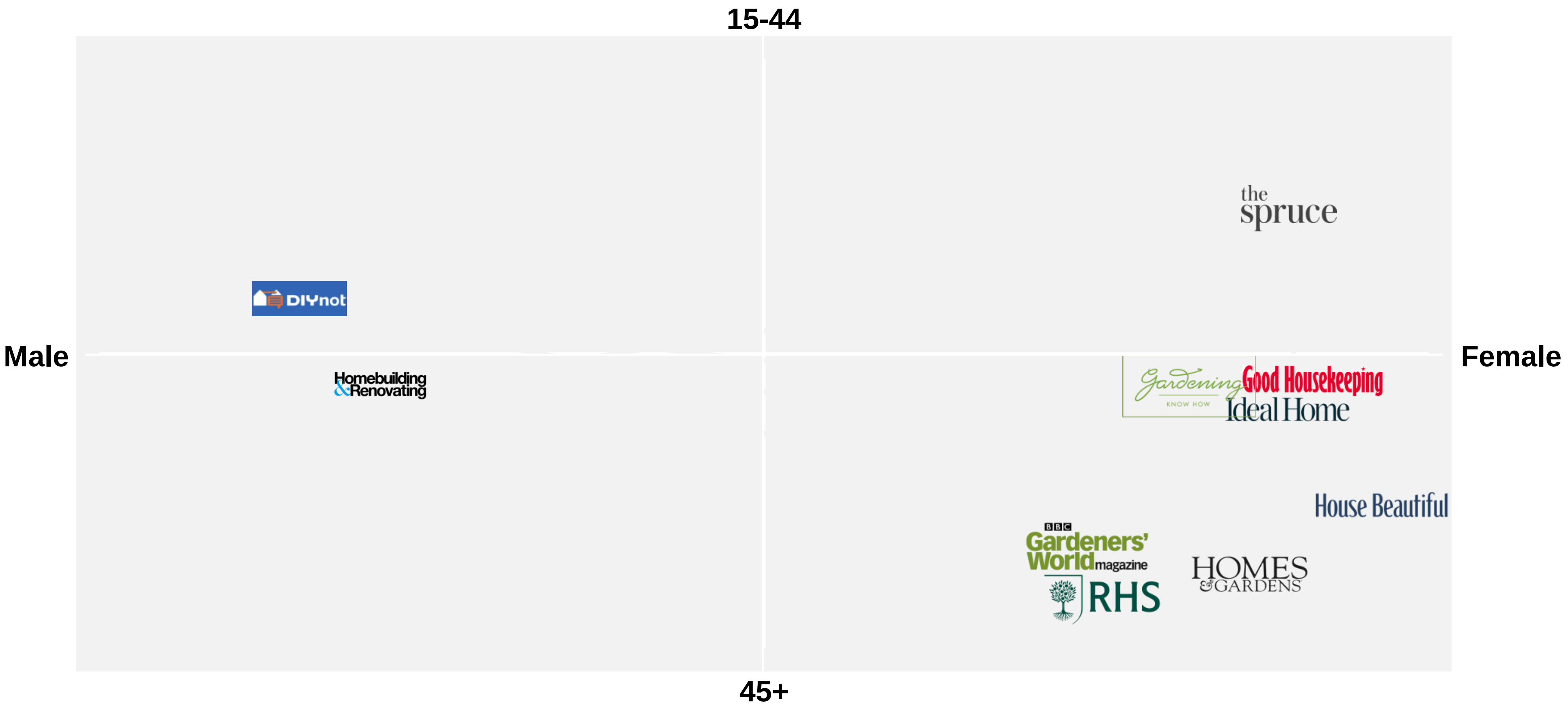


Percentage of visitors that only visit this brand out of the top 10 Home & Garden lifestyle sites

Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Home & Garden content visitors have a similar profile to retail – but skew more female

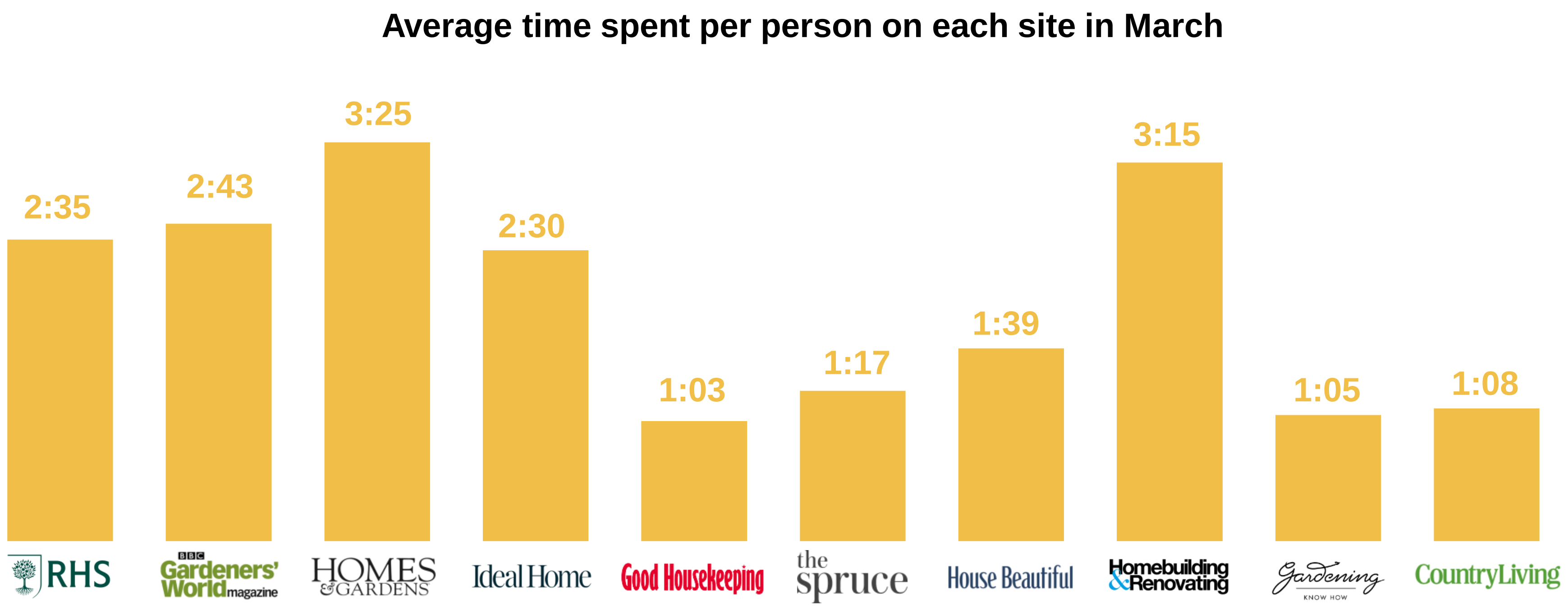
Differentiation will be harder – and even more important – for Homes and Garden content producers than retailers, as so many fall in the same quadrant



Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Homes & Gardens has the highest monthly engagement

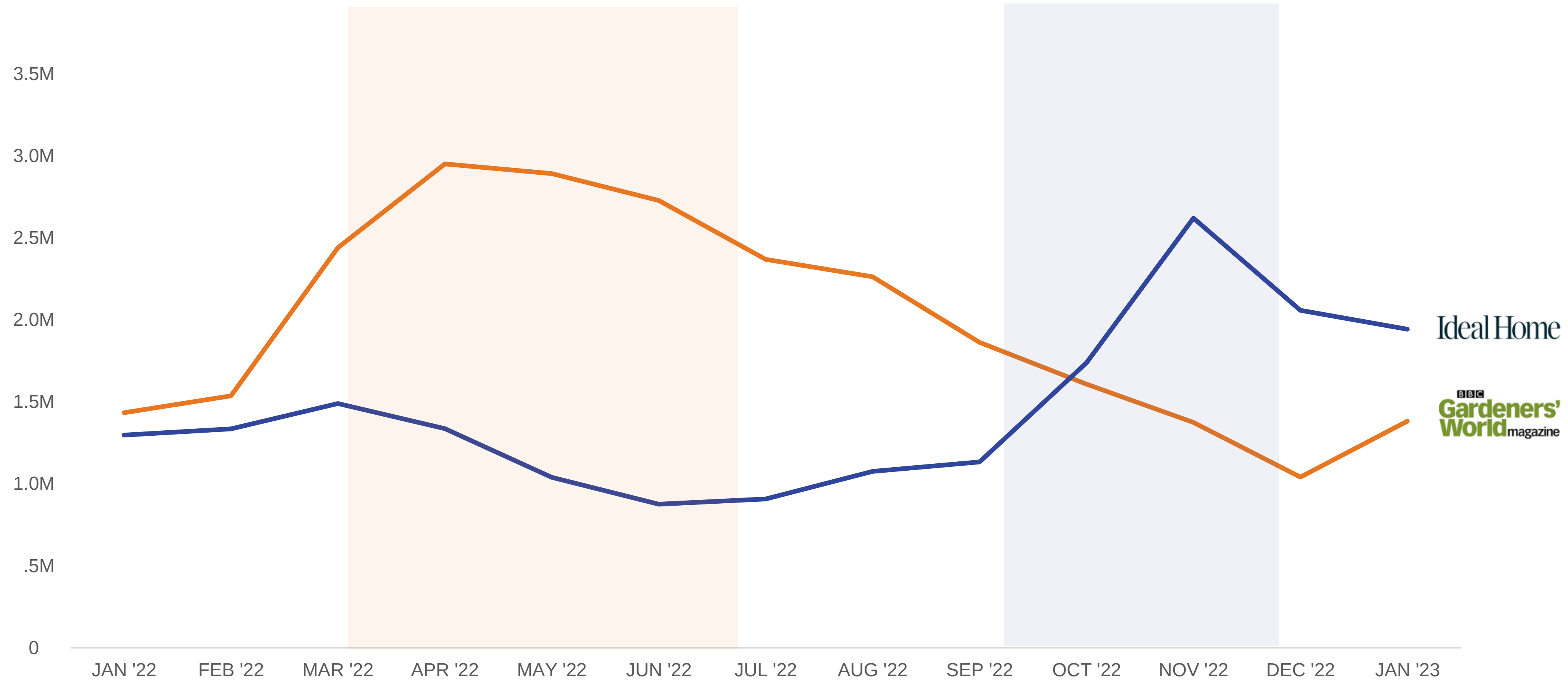
Generally, sites with larger audiences also have higher engagement, but brands like Homebuilding & Renovating deliver a particularly specialised and therefore engaged audience



Source: Ipsos iris Online Audience Measurement Service, March 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

There are clear seasonal differences in the audiences for gardening-focused and home-focused content

Content can be optimised around key periods for different categories, titles and content



Source: Ipsos iris Online Audience Measurement Service, January 2022 - January 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s).

Key takeaways – Lifestyle content

PLANNING: OPPORTUNITIES AWAIT

Home and Gardens content largely follows the same patterns as retail, but there is some white space opportunity to capitalise on periods of increased shopping . **How do you ensure you're producing content that taps into this audience?**

PROFILING: OLDER AND FEMALE

Home & Garden content attracts a slightly older female audience. **How can this fit into your media plans?**

PURCHASING: CONTENT CONVERTS

Home & Garden lifestyle visitors are an intentional audience: they are 42% more likely to visit Home & Garden retail sites in the same month, and much more likely to visit a range of individual brands. **Are you taking advantage of this engaged audience?**

PLANNING: SEASONALITY

Consumption of Home & Garden content varies heavily by title: **when are your key months? How do you compare to your competitors? Do their key periods match yours?**

FOR MORE INFORMATION

Matt Patchett

Insights Lead

Matt.Patchett@ipsos.com

Tracy Allnutt

Business Development Director

Tracy.Allnutt@ipsos.com

About Ipsos iris

Online is complex

Tech creates constant change

Enormous amounts of data is gathered every day

You need to trust that the data you're using is objective, trusted, and correctly informs your business decisions

Ipsos iris is the only industry endorsed online solution

UKOM

aop iab UK

ISBA

IPA

INDUSTRY BODIES FOR AUDIENCE MEASUREMENT

UKOM	PAMCo	RAJAR	BARB	ROUTE	Others

Challenges you may be facing

1|

Continuous change

2|

Pressure to deliver ROI on budgets

3|

Winning and retention of business

Used across teams and aids collaboration

Data | Insights | Strategy | Engagement | Planning | Activation

Build audiences to deliver on KPIs

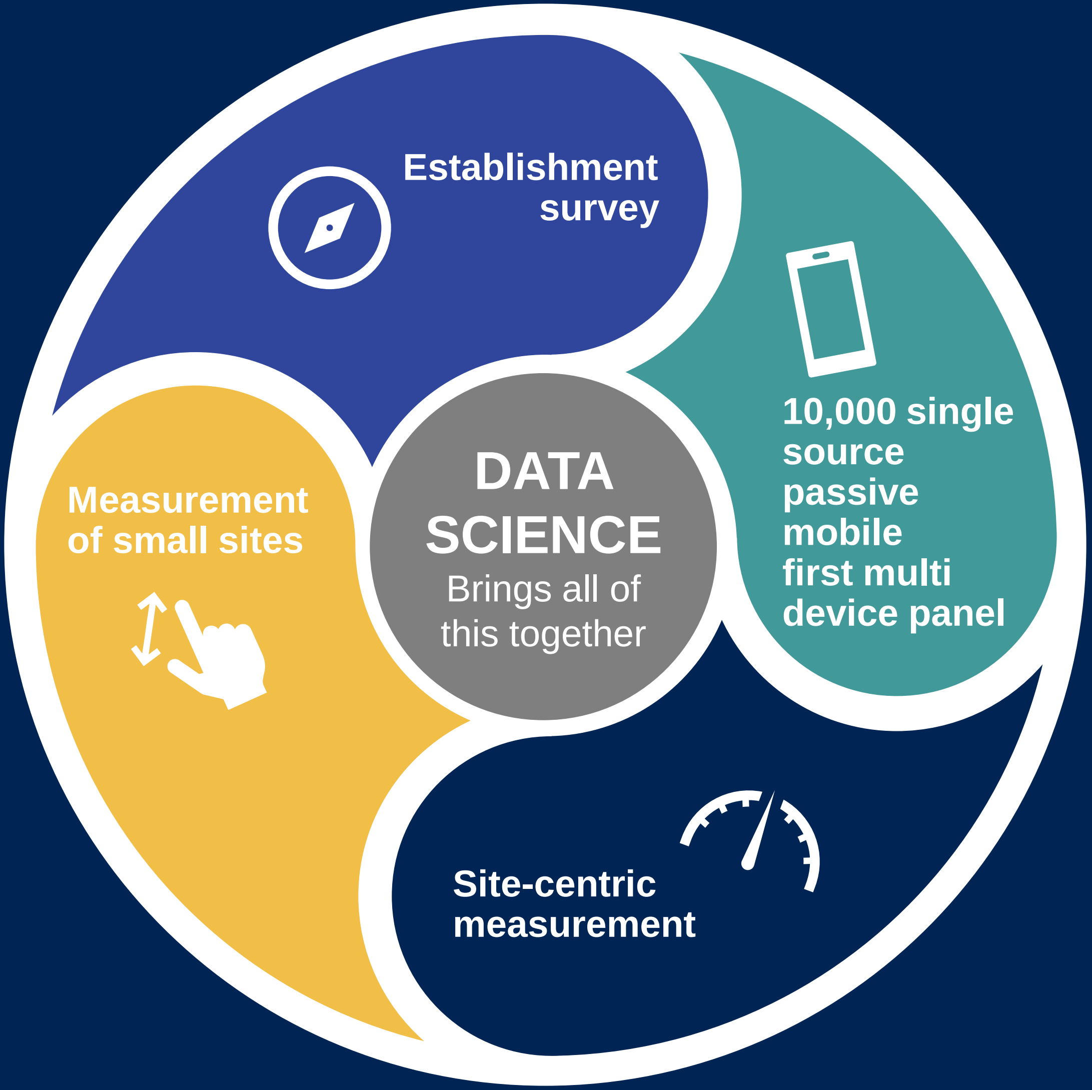
Market understanding and trends

Brand and competitor engagement

Where audiences go and what content they consume

Smarter thinking, more differentiation

Key pillars of approach



Reports available

Media

Analyse media entities by target group. The results are based on your selection and category filters.

Media Plus

A flat reporting structure. The results are static and not based on your selection and category filters.

Category

Analyse top categories performance during selected months.

Profiling

Identify the profile composition of selected media.

Ranking

Rank organisations, brands, websites and apps.

Cross-visiting

Analyse cross visitation and duplication of audiences between different media entities.

% Change

Analyse the differences and changes between different time period.

Dayparts

See the breakdown of the selected media or category by time-of-day.

Trend Analysis

Check the performance of the selected media through multiple period of times.