

2024

Autumn/Winter Market Knowledge Report



Autumn / Winter Market Knowledge Report

Welcome to the 2024 Autumn/ Winter FENSA and GGF Glazing Marketing Knowledge Report and I am delighted to be able to bring you this report in conjunction with Business Pilot and Keystone Market Research. Huge thanks must go to Elton Boocock and Charlotte Hawkes for agreeing to work with us on this report.

This is the first Market Knowledge Report we have produced directly in conjunction with external industry partners to help supplement the internal data we hold ourselves in order to give the sector a more comprehensive look at how the market is performing.

It is essential that FENSA and GGF collaborate with forward thinking and outward looking organisations such as Business Pilot and Keystone Market Research who have a unique insight into how the sector is performing combined with consumer insights that suggest future trends on the horizon. We are also fortunate to work with Hillarys who have kindly provided some of their own data into what consumer trends they have seen over the past twelve months.

Webinar

In addition to this report, some of you may already have watched the webinar we held on this topic in mid-November that gives some further context to the data included here and what we may expect over the coming months and into next year. For those of you who have yet to watch the webinar, a recording is available for all GGF Members and FENSA Approved Installers to watch on their respective websites at their convenience.

The Year To Date

There is no hiding from the fact that this continues to be a challenging time for the industry. With Everest 2020 having followed the same path as Safestyle it shows that even the most established brands are not immune to market pressures and our sector will have to be at its most creative and resilient best for a little time yet before we start to see sustainable signs of growth.

All that being said, I believe this report will highlight that the current performance of the industry is in line with what

would have been expected had Covid not had such a significant impact in a truncated period of time.

As always, I hope you find the latest edition of the Market Knowledge Report of use to your business and that you find the significant contributions from Business Pilot and Keystone Market Research complimentary to our own data and insights.



JOHN AGNEW

CEO at GGF Group

I founded Keystone Market Research in 2023 with a clear mission: to improve the availability of reliable data for the fenestration industry. Without a clear understanding of the market and where your company falls within this it is impossible to make informed decisions. It is this commitment to supporting the industry with actionable insights that makes me particularly pleased to contribute to this collaborative publication.

This report represents a joint initiative between companies

and organisations that share a deep commitment to the power of data. Together, we aim to provide a comprehensive snapshot of the industry—exploring where we currently stand and what lies ahead. Through this report, I am excited to share some of the insights Keystone have gathered over the past year, reflecting both consumer perspectives and industry dynamics.

I hope you find the insights in this report both informative and actionable. If you're interested in finding out more about the data

Industry collaboration is something that I'm really passionate about, and so when the opportunity arises to join forces with other organisations in our sector it's always easy to say yes.

This report brings together data and statistics from a number of sources to paint the real picture of our UK window and door industry. The in-depth market research information provided by Keystone Market Research gives us the consumer perspective whilst FENSA's job certification statistics underline installer activity.

When we compare this information with our Business Pilot Barometer data, we discover key patterns and trends to help us all understand what's going on in the market and see what we can learn from that, to predict and prepare for the future market. What has been really interesting

about this collaboration is seeing how our collective data follows the same trends, even when we map it against other out-of-industry sources such as Google. It proves the accuracy and reliability of the data we are gathering.

We all know that SME businesses, like the ones that make up the majority of our sector, often have owners and directors who wear many 'hats'. They can be involved in sales, marketing, HR, operations, installations, finance and many other business functions, not just from one day to the next, but from one hour to the next.

Businesses who are looking at growth plans and wondering where is best to invest in their companies for a stable and successful future need to know the numbers, rather than basing decisions on gut-feeling. And that's why reports like this are such a crucial tool for our industry. Having a central 'command

we've shared, or are looking for bespoke research support, please don't hesitate to get in touch.



CHARLOTTE HAWKES

Director at Keystone Research

centre' which has all of your business data and information in one place is essential to save time, money, and sometimes even our own sanity. That is exactly what the Business Pilot system delivers for our users. It has been a pleasure to combine our monthly Business Pilot Barometer data with the GGF, FENSA and Keystone Market Research for this report. If you would like to discuss any of these findings in more detail, please feel free to reach out to me.



ELTON BOOCOOCK

Managing Director at Business Pilot

FENSA MARKET DATA



What Has Happened In 2024?

Firstly, to provide some context to the numbers shown here in the table, 2023 saw a 7.9% decrease on the number of installations against those seen in 2022. The data here shows 2024 figures against 2023 thereby highlighting a further drop against the numbers being seen two years ago.

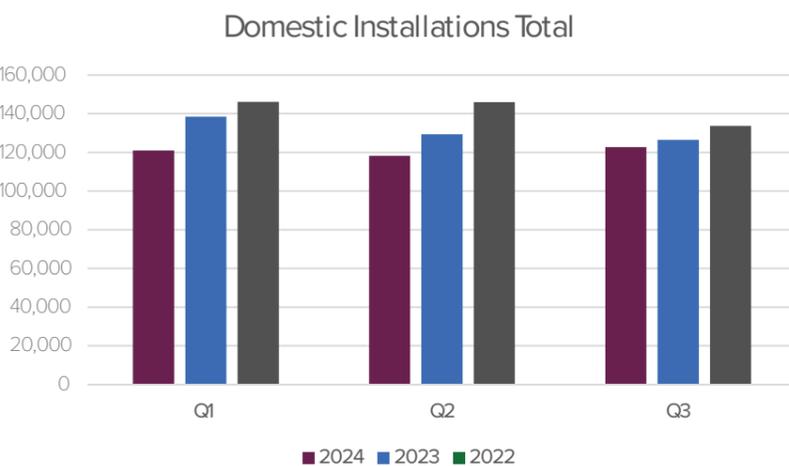
Overall Domestic RMI Installation Numbers

The decline in the market seen at the end of 2023 continued into this year and the Q1 figures for 2024 clearly show subdued homeowner demand for new windows and doors. What is pleasing to see however is that the 12.6% comparable decrease in Q1 figures has now shrunk to just a 2.6% comparable decrease in Q3 which would indicate that the drop in homeowner demand has bottomed out.

For pragmatic reasons FENSA forecasted the market would be down 14% in 2024. Year to date with the first three quarters available, the market is down 8.2%. So whilst the current landscape is better than had been cautiously predicted we need to acknowledge that trading conditions are still tough.

Quarterly Installation Comparison 2022-2024

	2024	2023	2022
Q1	121,053	138,529	146,156
	in 2024: 12.6% decrease		in 2024: 17.2% decrease
Q2	118,179	129,340	145,990
	in 2024: 8.6% decrease		in 2024: 19% decrease
Q3	122,724	126,419	133,754
	in 2023: in 2024: 2.9% decrease		in 2023: in 2024: 8.2% decrease



To give some insight into what is expected, FENSA are forecasting a 2% increase on installations for 2025 against 2024 figures. This is pleasing news of course. We do expect to see some small levels of growth next year before further increases in 2026 and are cautiously optimistic that we will see an upturn in consumer demand over the next two years.

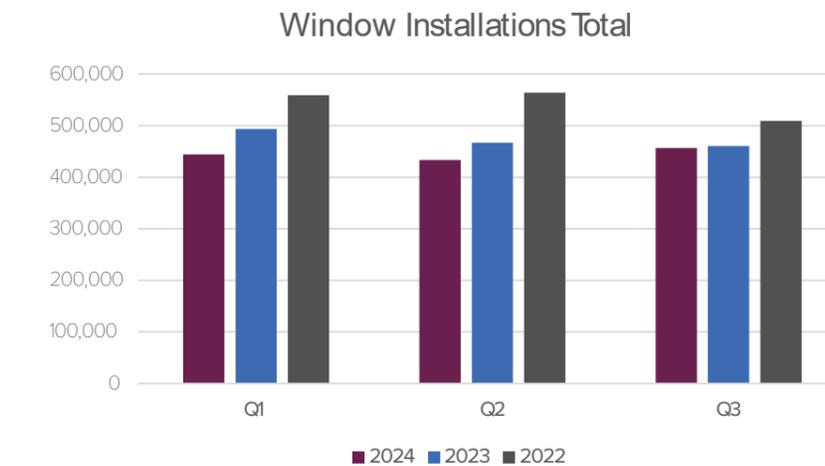


Windows per installation

Bucking the trend against the decreasing number of installations is the number of windows installed per job. We have seen a 2.5% increase in the average number installed per job this year against 2023 figures. This may not seem like a big increase but there has been very little movement on these figures for a number of years. It has also been a consistent increase over a number of months rather than a short spike which indicates this is part of a wider trend. So whilst there may be fewer jobs, they are of a bigger size.

Quarterly Windows Installation Comparison 2022-2024

	2024	2023	2022
Q1	444,435	493,560	559,152
	in 2024: 10% decrease		in 2024: 20.5% decrease
Q2	433,660	467,188	563,811
	in 2024: 7.2% decrease		in 2024: 23.1% decrease
Q3	456,808	460,581	509,086
	in 2024: 0.8% decrease		in 2024: 10.3% decrease



This is in line with the overall downward trends, but the number of windows installed per job means that the comparable figures seen for Q3 in '23 and '24 are within 1% percent of each other.

If there is to be a 2% increase next year in the overall number of installations then the further increase of 2.5% in the size of jobs fitted is further good news for the industry.

Quarterly Doors Installation Comparison 2022-2024

	2024	2023	2022
Q1	96,949	111,240	119,207
	in 2024: 12.8% decrease		in 2024: 18.7% decrease
Q2	94,031	104,859	122,383
	in 2024: 10.3% decrease		in 2024: 23.1% decrease
Q3	98,904	101,706	112,664
	in 2024: 2.8% decrease		in 2024: 12.2% decrease

Is This What Was Expected?

What is interesting to note is taking the trends and forecasts seen prior to Covid, and excluding the two year spike seen as a result, then the figures currently being seen are almost exactly in line with what would have been expected.

That of a circa 3% decline year on year in the market.

Covid in the UK effectively meant the industry saw an unexpected 2 year boost to productivity and consumer sales that reversed the gradual year on year decline we had been seeing up to that point.

What it has meant is that the sharp decline we have seen and felt over the past two years has impacted upon the industry in a much more severe way than we would have expected.

A 3% decline year on year, whilst something that needs to be addressed, would have been a trend that businesses of all sizes would have planned for and factored in as opposed to dealing with the roller coaster effect that Covid has had over the past four years.

What Positives Can We Take

If looked at in isolation, the RMI data for the past two years does not paint a pretty picture. However, there are some green shoots of recovery currently being hinted at. The closing of the gap in the number of installations and windows installed in Q3 of this year against 2023 shows the decline is flattening out.

When this is factored in alongside the FENSA forecast of a small increase in the market for 2025 followed by further increases for 2026 there are positives to be taken.

This, alongside the seemingly new normal of larger jobs being quoted for, at an average cost of over £4,500, means there is still a significant market for companies to operate in and succeed.



Lis Clarke - Operations Director FENSA

“The volume of work undertaken, and the resilience of so many FENSA Approved Installers shown over the past two years is to be commended. We’re hopeful that our community of installers will see some improved market conditions next year with an increase in the number of leads being seen as homeowners are more confident in the income they have to spend on home improvement projects.”

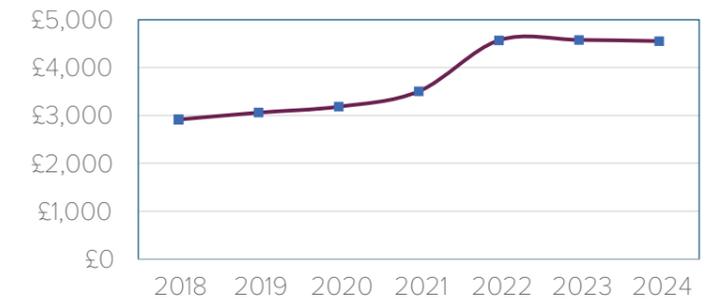
Year by year average installation cost

The average cost of a job registered with FENSA has increased considerably since 2018 when it was at £2,916. By 2021 the average cost of a job was already at £3,504 but we then saw a significant leap in 2022 to £4,567. Interestingly the average cost per job has since remained at that level, rather than increasing, in 2023 and the current year to date.

This would suggest that margins are being squeezed. The cost of everything has increased significantly over the past two years but this increase has not been passed on to the homeowner, meaning the industry has taken a hit across the supply chain.

There are undoubtedly less leads filtering through to installers, but of those that are coming through, they are of greater quality as they are being undertaken by homeowners who have been less impacted by the current financial situation being seen in the UK.

Year	Average Cost	Year on Year Growth
2018	£2,916	
2019	£3,060	4.9%
2020	£3,184	4.1%
2021	£3,504	10.1%
2022	£4,567	30.3%
2023	£4,576	0.2%
2024 (to date)	£4,551	-0.5%



Lis Clarke - Operations Director FENSA

“Given the significant increases in costs that have been seen over the past 6 years, it should not come as a surprise that some homeowners have hit the pause button on having new windows and doors installed in the midst of a cost of living crisis. However, the quality of leads coming through now are more considered. In addition, Keystone’s data shows 9% of homeowners are planning on having new windows and doors installed in 2025. So the opportunities for the FENSA community remain considerable”

State of the Nation: Market Trends and Insights

The past five years have brought a variety of changes to the industry, with notable shifts in buyer behaviour, sales conversions, and market demand.

Business Pilot Barometer data is extracted from the Business Pilot CRM system, giving us accurate average numbers of leads and sales activity in retail installation businesses. It also gives us insight into changes in lead times, conversion rates and project values as well as data on product material types.

2019 - 2024 Steady Decline in Leads & Sales

Mirroring the trends identified in FENSA's job registration figures, we have seen a steady decline in leads and sales. From 2019 - 2024, the average number of leads decreased by 22% and the average number of sales decreased by 16%.

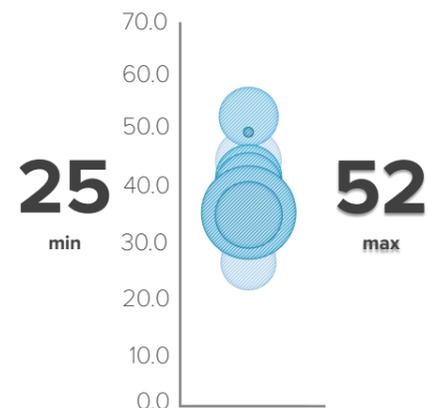
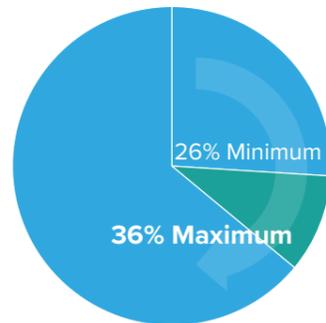
Over the same time period, searches for glazing related terms on Google dropped by 5%. Meanwhile, lead to sale conversion rates are steadily improving, though they don't show any wild fluctuations. They sit between 26% and 36% over the five years.

Average lead times remain consistent too, even when we factor in the supply chain issues and price hikes following the Covid lockdown period. We saw a minimum of 25 days and maximum of 52 days, but the majority of the time it sits between 30 and 40 days.

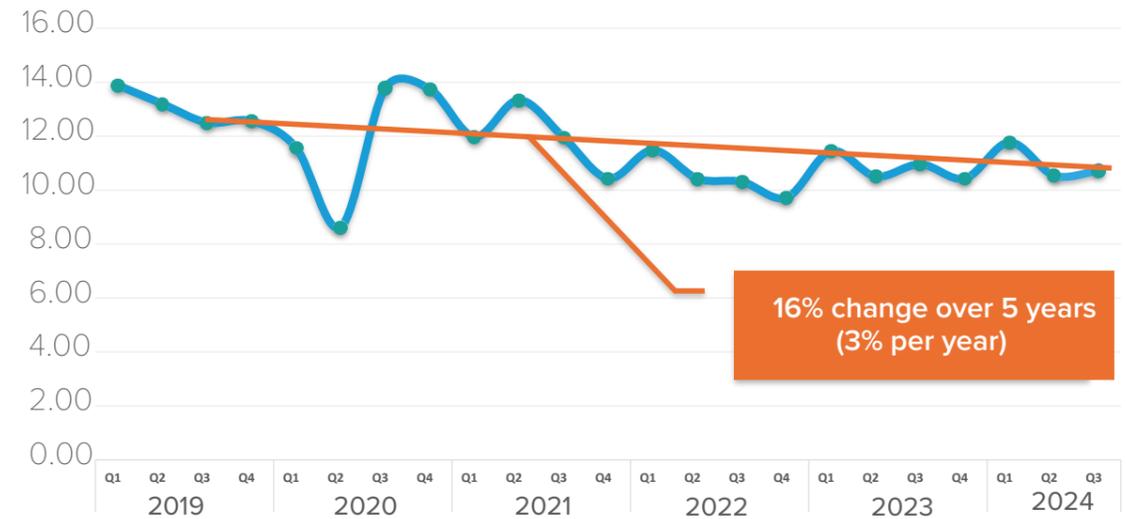
So a lot does remain static, but as an industry that can be so heavily affected by external factors out of our control, this does help to give us a level of predictability.

The numbers point to the conclusion that homeowners are doing more research online before making enquiries, so there are fewer 'tyre-kicker' leads coming through.

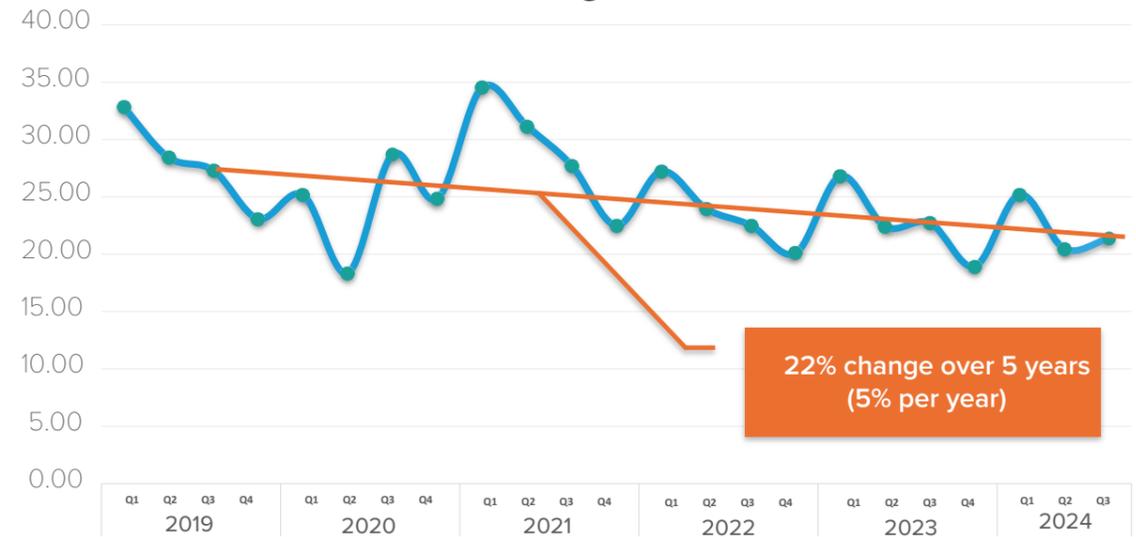
By far, the positive takeaway is that there has been an 85% increase in average order value. We all know that costs have increased, so how does this now compare to your sales value? Are you maintaining your margins?



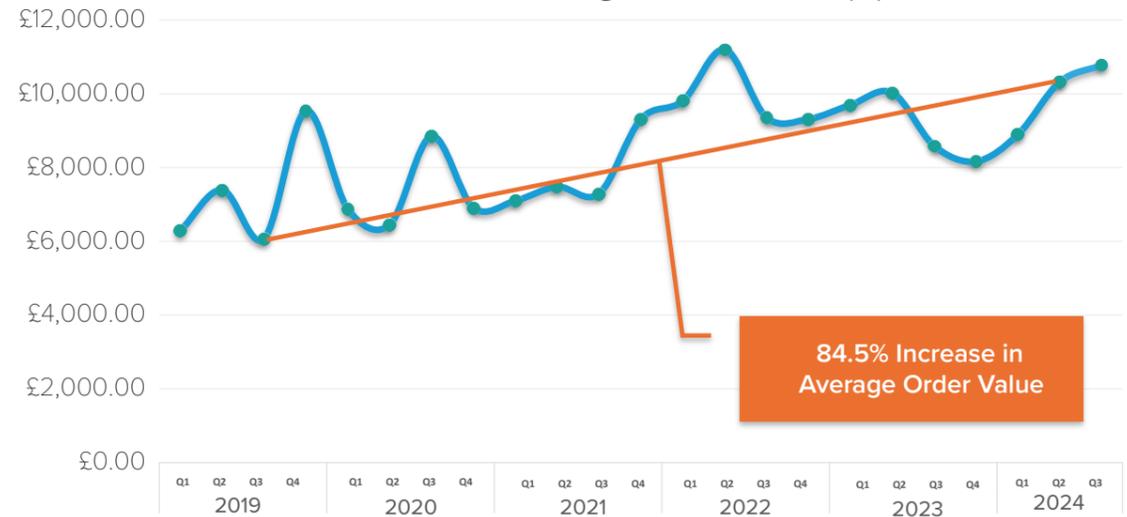
Business Pilot: Average Number of Sales



Business Pilot: Average Number of Leads



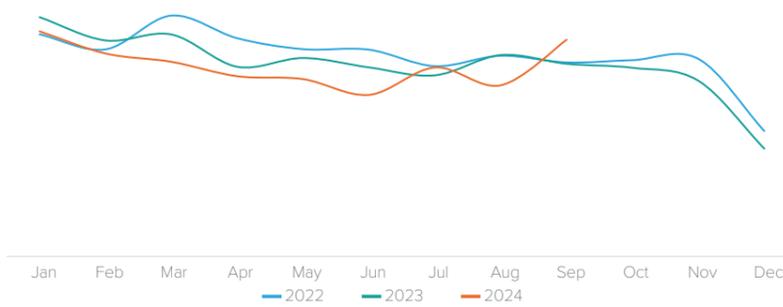
Business Pilot: Average Sales Value (£)



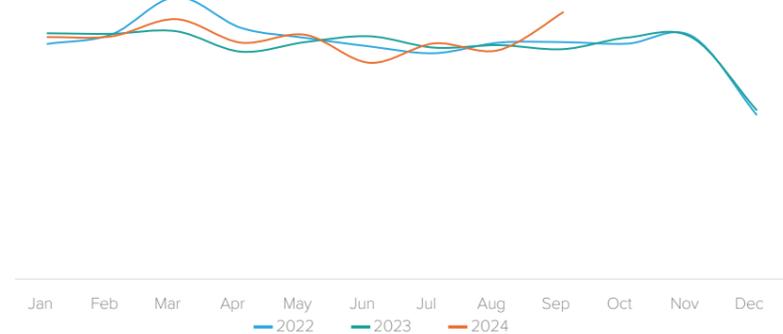
2022 - 2024 The Post-Covid Picture

Looking more closely at the post-Covid picture, it will come as no surprise that 2024 is down on previous years, but September 2024 saw a marked improvement with an uplift in both sales and leads which has continued through October and into November (the time of writing). Presenting the data in this format also helps us to see seasonality. When we remove larger external factors, such as Covid and smaller ones like the General Elections and looming budgets, there is a consistent seasonal pattern to retail sales activity.

Business Pilot: Leads



Business Pilot: Sales



How the Product Mix Affects Things

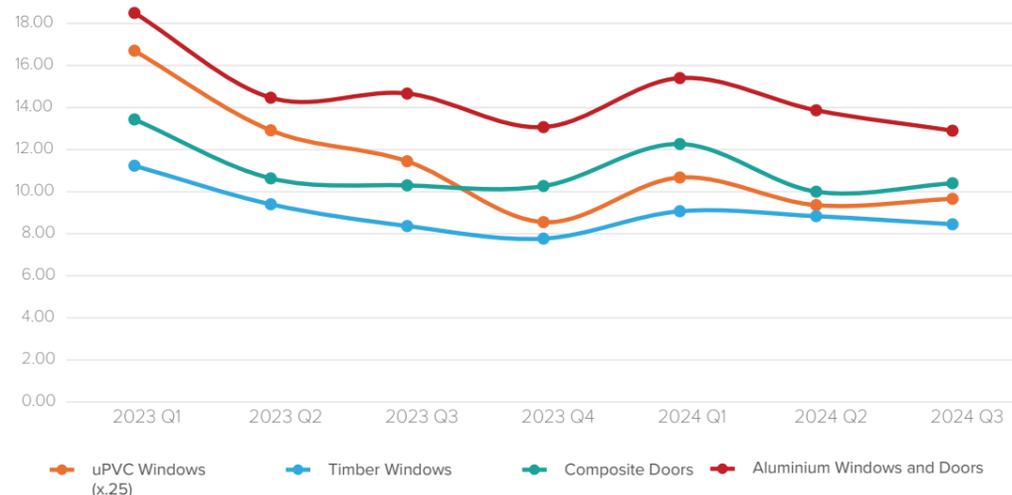
Some installers will see that this is reflective of their own experiences, whilst others will have experienced far better or, far worse results.

A lot of this is affected by the mix of products that your business installs. uPVC windows & doors account for almost four times that of the other materials that we measure - timber windows & doors, aluminium windows & doors and composite doors - so these seasonal trends will have more exaggerated fluctuations due to volumes. Equally, selling a wider mix of products will remove them.

We can see that the leads decline is more significant than sales across all materials but the average lead to sales conversion rate is much steadier, showing a slow and steady upward trend. This reinforces the trends from our 2019-2024 data overview, that there may be fewer leads, but those leads are more qualified and more likely to convert.

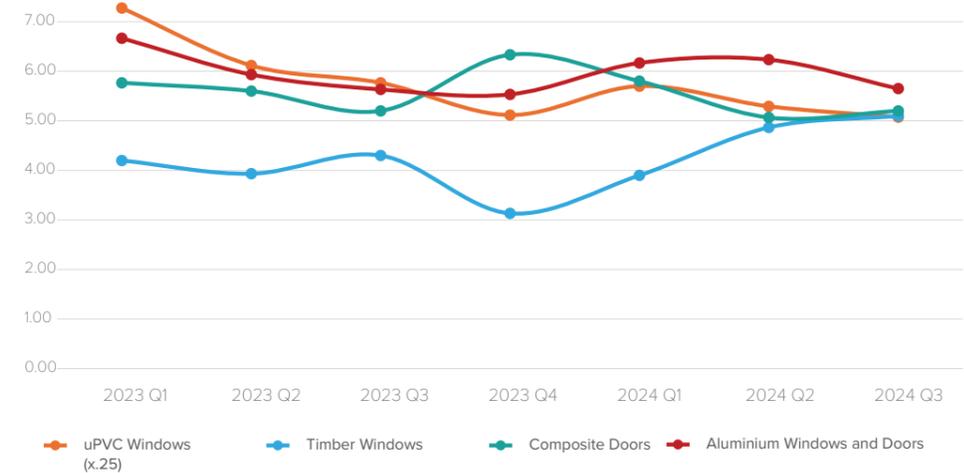
Business Pilot: Average Leads by Product

uPVC Windows reduced by 4x for trend comparison

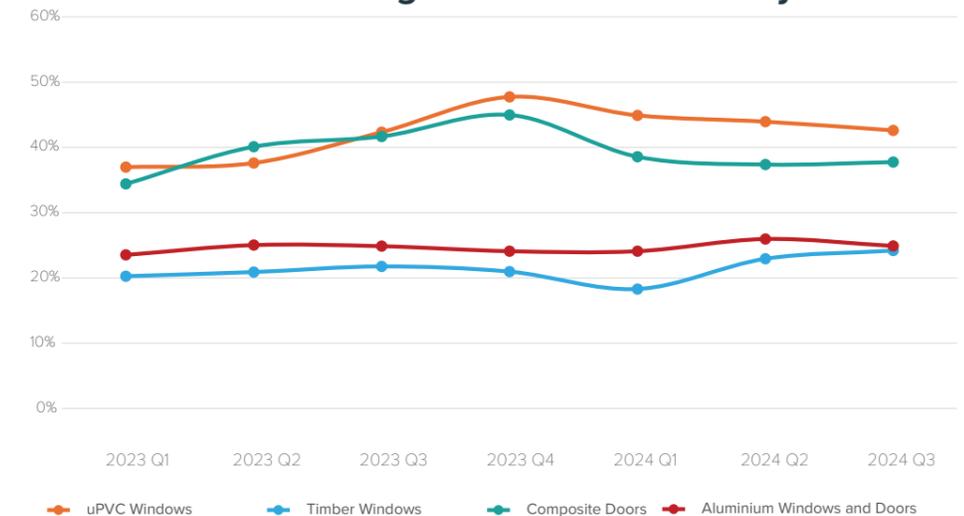


Business Pilot: Average Sales by Product

uPVC Windows reduced by 4x for trend comparison



Business Pilot: Average Conversion Rates by Product



Key Takeaways for Installers

Of course, the most crucial part of understanding this data is ensuring we maintain perspective and context. No-one could have expected the post-Covid boom to continue forever, and our sector has felt the effects of that drop throughout 2024, but we are now seeing a much more positive outlook.

When we look at the overview of the data, there are many positive takeaways. Leads, though fewer, are much more qualified. Homeowners are doing more research before they make an enquiry and average spend is higher. Seasonality trends remain consistent. Offering a more diverse product range can even out performance.

Practically speaking, here's what you can focus on now to beat the numbers and improve your own outcomes.

Digital Marketing

Make it easy for customers to find you online and have lots of information on products and projects available to support consumers doing their research

Exploit Seasonality

Seasonal trends are predictable - use the data to plan & deliver marketing campaigns and use the information to plan resources in your business

Diversify

Considering offering a wider mix of products to help eliminate the impact of fluctuations in window and door material trends

Moving Past Covid Forecast 2024 - 2026



2020: Initial Decline: The COVID-19 pandemic had a significant impact on the uPVC fenestration market in 2020, with volumes dropping by 12.5%. Supply chain disruptions and decreased construction activity due to lockdowns and economic uncertainty caused many projects to be delayed or cancelled.

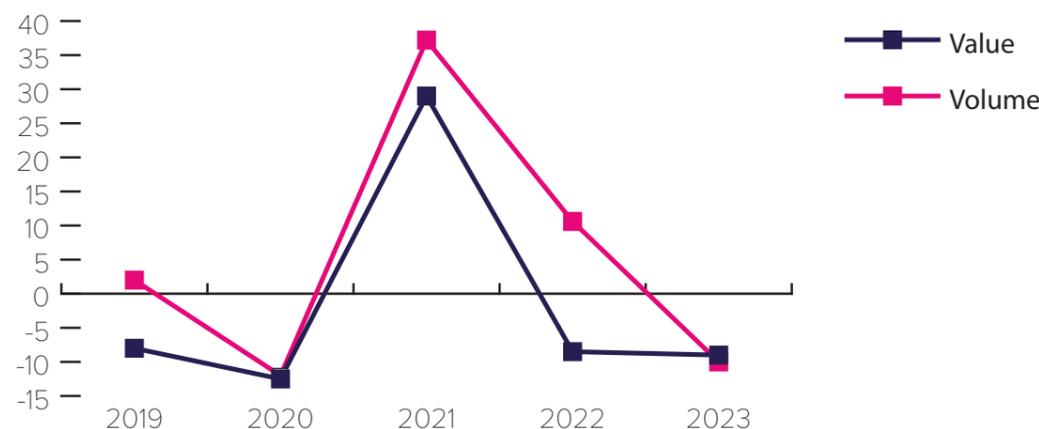
2021: A Sharp Rebound: In contrast, we all witnessed the remarkable rebound in market volumes that 2021 brought, with demand rising by 29%. This surge was driven by a shift in consumer behaviour, as households redirected their spending from travel and leisure activities to home improvement projects. The fenestration industry benefitted from this trend, with many homeowners investing in renovations, extensions, and upgrades during the prolonged periods at home.

2022: Market Correction and Value Peak: Following 2021's surge, the market began correcting itself in 2022 with an 8.5% decrease in volume. However, this did not reflect a decline in market strength—value actually grew by 10.6%, reaching its highest peak. This outcome can be attributed to a number of things, including continuing high demand and shortages driving up prices and a shift toward higher-value product specifications and premium offerings.

2023: Normalisation Post-Pandemic: In 2023, the market continued to decline in volume, dropping by another 9%. The value of demand also decreased by 10%, signalling a normalisation of demand levels after the exceptional highs of the pandemic years. Compared to the last stable pre-pandemic year of 2019, the 2023 volume was 6% lower. However, if we consider the cumulative volume for the years 2020-2023, the market only saw a marginal decrease of 0.6% overall compared to a stabilised scenario, indicating that the pandemic's impact on demand has now largely been accounted for.

2024 and Beyond: Modest Growth Ahead: Despite the removal of the pandemic adjustments, 2024 is proving challenging, with political uncertainty, a subdued housing market, and inflationary pressures affecting homeowners' spending. Based on an analysis of economic indicators and wider construction market forecasts, Keystone is forecasting a 5.8% decline in volume at the fabricated products level for 2024, with a slight stabilisation expected in 2025 and modest growth projected for 2026. Value is expected to perform slightly better, reflecting the continuing shift toward higher-value product specifications and varied performance across different market segments.

UK Profile Demand - % Variation Y-o-Y



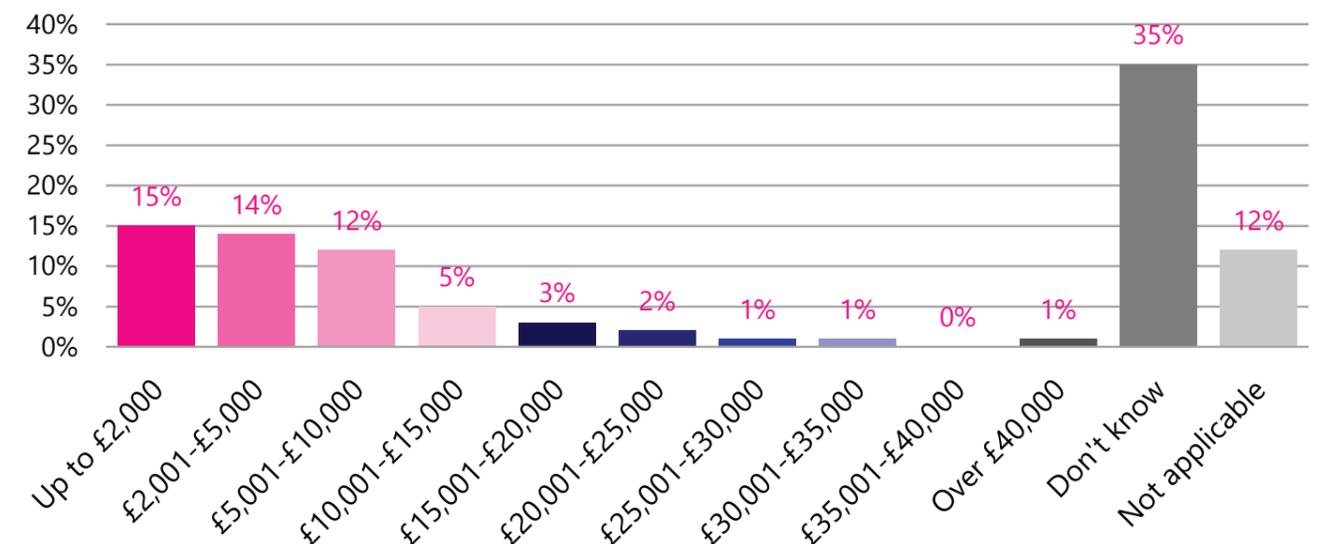
Homeowner Spend 2025 vs 2024



The latest Keystone Consumer report also uncovers in detail homeowner planned spend for 2025 and there are positive signs for the year ahead.

- For 2025 compared to 2024, 22% of homeowners indicated increased budgets, and an average increase of £7,386, 7% indicated a decrease at an average decrease of £8,125, and 47% said they would be keeping their budget the same. The net effect being an increase of 15% next year. There is however, 24% of respondents undecided about how much they will be spending on their home next year.
- Interestingly, for 2025 the demographics that were more likely to increase their budgets were the younger age brackets of 18-24 and 25-34 (36% on average) compared to the older homeowners 55+ (17% on average). This might account for younger homeowners taking on homes that require more work, compared to more established homeowners.
- The London and Northern Ireland regions were more likely to have increased budgets also, compared to the Eastern and South East regions which had the lowest amounts of homeowners increasing their spend next year.
- In the Autumn survey results homeowners were asked how much money they were planning to spend overall on home improvements in 2025. The average result was a spend of £7,485 across all homeowners. As seen in the previous result, a sizeable proportion are still undecided on what they are likely to spend next year or not choosing to invest, this is likely due to the uncertain economic climate. This however, still leaves 53% of homeowners planning some type of home improvement investment in 2025.

Homeowner Planned Spend on Home Improvement in 2025

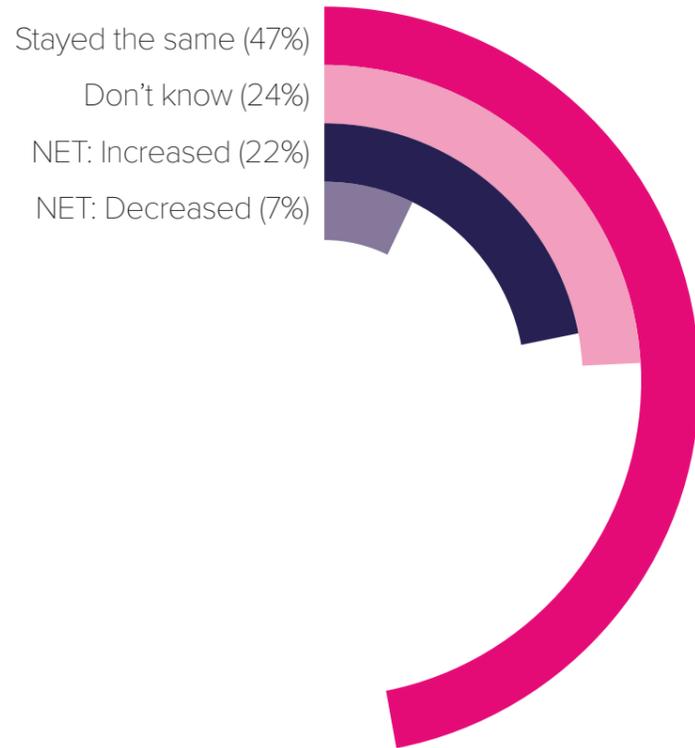


Homeowner Spend By Project Type



Looking further ahead homeowners are asked which home improvement projects they have planned, and the timeframe for these. Both fenestration and alternative home improvement areas are included in order to compare how consumer's prioritise projects.

Homeowner Budget Change - 2025 Vs 2024



- In the Autumn survey results we saw the proportion of planned home projects drop slightly, however this was mostly within the longer timeframes.
- The 1-5 years time period remains overall the time when most projects are being planned for.
- We can see that for the fenestration industry, doors feature as a top priority in the short-mid timeframes, with windows becoming the primary priority in the longer term for homeowners and overall windows being the second most often chosen home improvement project to complete.

	New windows	New external door/s	Refurbishment of an old conservatory roof - modern warm roof replacement	Complete replacement of an old conservatory	A new home extension/conservatory	An insulated garden room/building for year-round use	External cladding or roofline	Bathroom or ensuite remodel	Kitchen remodel
Within the next year	9%	9%	4%	4%	3%	4%	6%	10%	9%
1-5 years	20%	22%	9%	5%	8%	10%	8%	25%	24%
6-10 years	14%	12%	4%	4%	6%	5%	6%	13%	13%
Over 10 years	21%	18%	4%	6%	8%	5%	9%	15%	18%
NET: Planning Purchase	64%	61%	21%	19%	25%	24%	29%	63%	64%
Don't know	25%	26%	13%	12%	23%	24%	32%	24%	23%
Not applicable	11%	13%	66%	69%	51%	51%	40%	14%	13%

Maximising The Opportunity



To enable installers to make the most of the opportunities available by targeting their marketing effectively, we asked homeowners where they would begin to look for information when they were in the market for new windows and external doors, the responses repeatedly confirmed the importance of local support and a preference towards local installers.

Online search features highly with 61% of respondents including this in their information search. Recommendations was the second highest source of information and within these responses 89% were recommendations from friends, family or neighbours, and 11% were recommendations from local builders merchants or trusted local trade contacts.

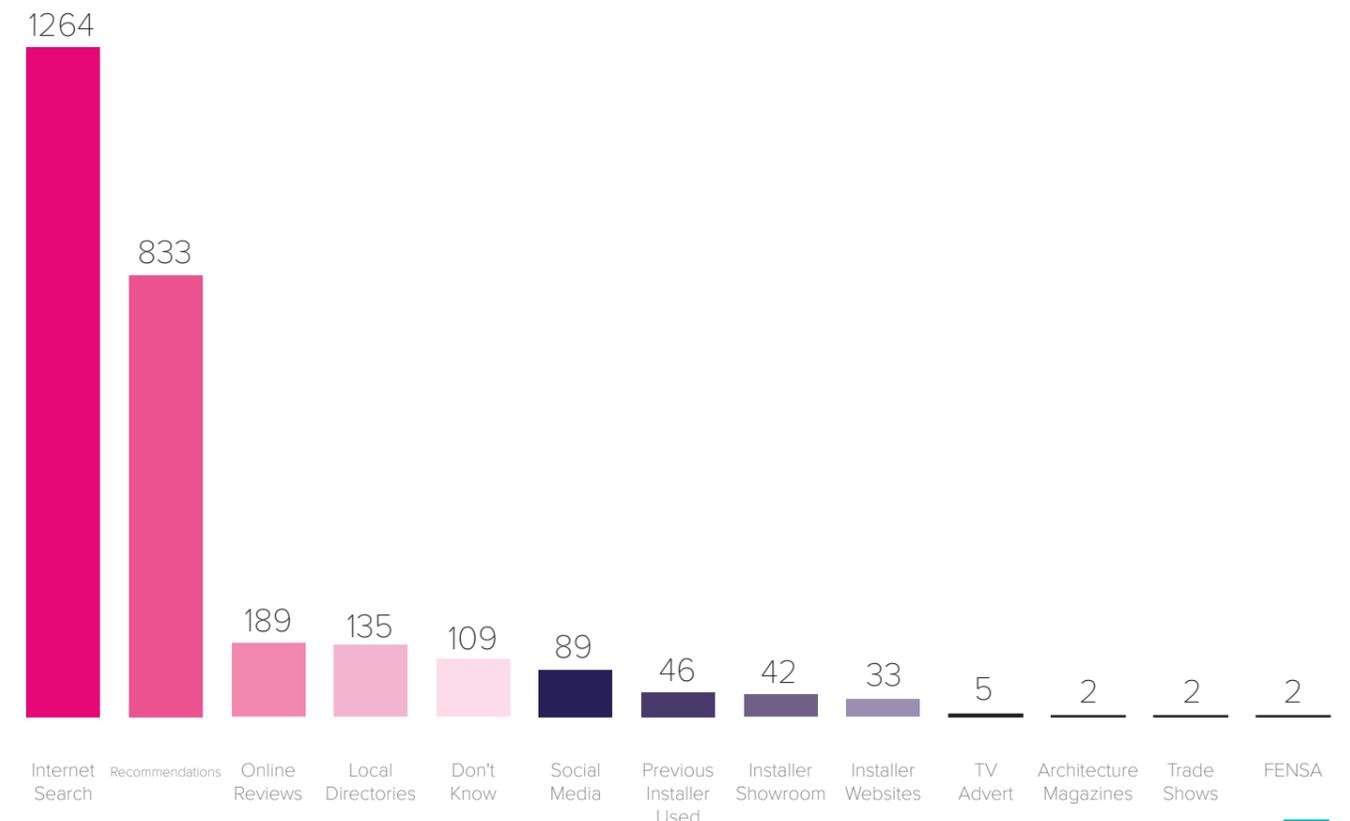
Online review sites were the third highest mentioned source at 7%, with Checkatrade being the most mentioned site by name (by 31% of respondents who would use online reviews), followed by Which? Trusted Trader (18%) and Trustpilot (9%).

Consumers also look to local printed directories (7%) and out of the 4% who included social media in their response, notably 75% of these were for local Facebook groups and 8% for Nextdoor, due to the overwhelming preference for local recommendations.

Information Sources

When asked where respondents would begin to look for information when they were in the market for new windows and external doors, the responses repeatedly confirmed the importance of local support and a preference towards local installers.

Windows & Door Information Sources



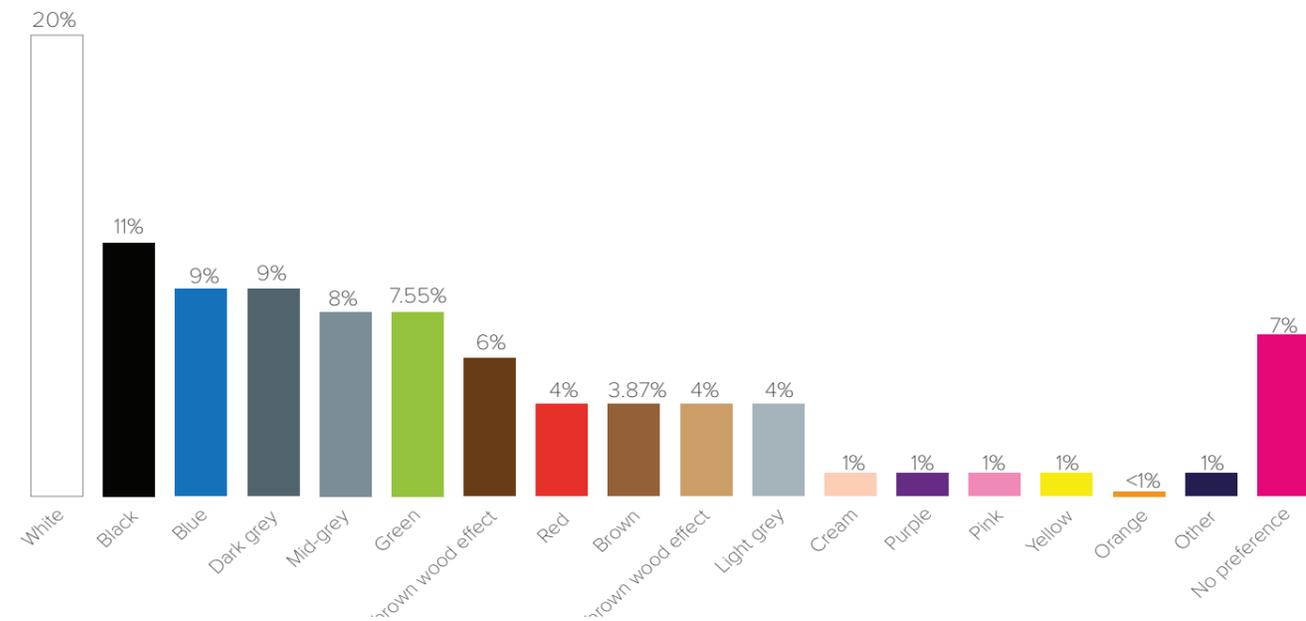
Consumer Trends



Colour

- In windows over the year we have seen increasing interest in white, representing 48% of homeowner choices over all the surveys and consistent interest in grey options, which overall represented 25% of homeowner choices.
- In doors however, homeowners are becoming more experimental with colour with only dark grey from the original top 5 at the beginning of the year experiencing an upward trend over the year and white only representing 20% of homeowner choices overall.

Overall: Door Colour Preference



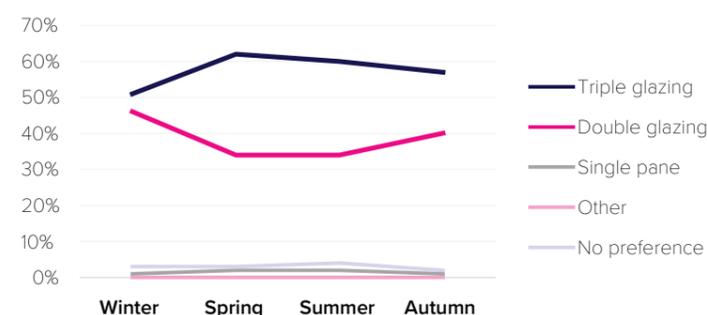
Material

- We've seen consistent increase in uPVC as the material preference for both windows & doors over the year, with wood showing an upward trend also, particularly for doors. Whereas aluminium declined for both products over the year.
- Of all the specification choices though, triple glazing preference has stood out throughout the year, with 57% of the 5,600 homeowners indicating they would choose this when next purchasing windows, followed by double glazing with 38%, and single pane with 1%. When asked why they wanted triple glazing the main reasons were to provide enhanced energy efficiency and reduce noise transmission.

Style

- Traditional casement windows and pitched roofs with skylights have consistently been the top choices for homeowners throughout 2024, and sliding patio doors for the majority of the year. These styles not only held their positions but showed upward trends over the year, reinforcing their long-term appeal.

Annual Glazing Preference



Consumer Priorities



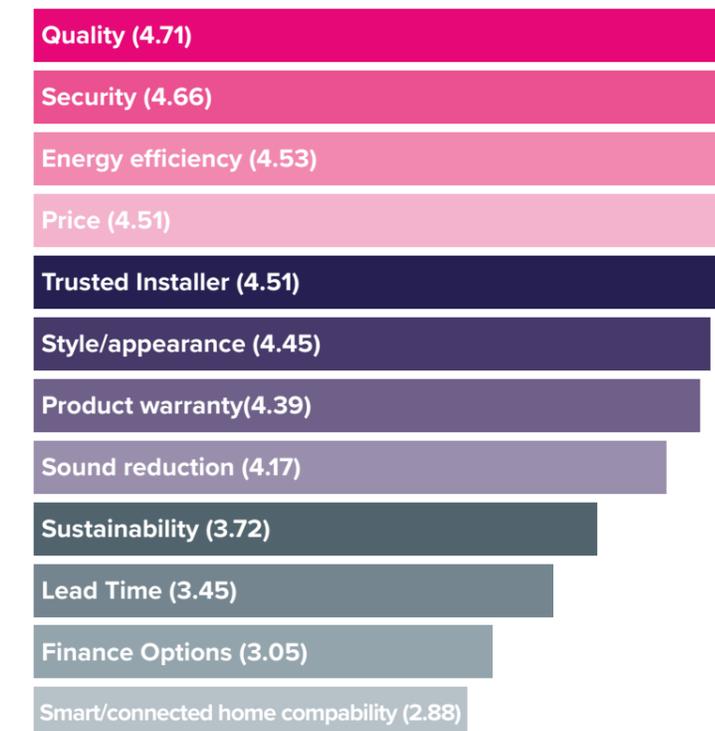
Understanding why our customers buy is key to being able to sell effectively in a competitive market. By asking homeowners to rank their priorities for fenestration products in our surveys over the year, we have built a clear picture of what really matters to consumers when selecting windows and doors.

- Looking at the Consumer Purchasing Priorities throughout the year overall, quality and security were the top 2 priorities, with energy efficiency coming in third. However in the most recent survey alone, price moved up from fourth place to third place indicating homeowners recently are becoming more price conscious.
- The preference for quality over price, underscores a significant trend: homeowners are willing to invest more upfront for superior products that promise durability and long-term performance. While cost is a growing consideration, it is not the primary driver, homeowners are instead looking for value.
- Security emerged as the second most important consideration, highlighting a fundamental need to protect their homes. This priority indicates that peace of mind often outweighs cost considerations, and emphasises the value placed on robust, secure fenestration solutions by many homeowners.
- Energy efficiency consistently ranks highly, coming in third. This contrasts with sustainability, which was ranked ninth. This preference reflects homeowners' desire for direct personal benefits such as lower utility bills and enhanced comfort, over broader environmental impacts currently, and indicates that energy-saving features are still a significant draw.

- Using a trusted installer was ranked fourth, highlighting that homeowners understand that the quality of installation directly impacts the performance and longevity of their windows and doors. Homeowners prefer to work with companies and individuals who have a proven track record, positive reviews, and local recommendations.
- The bottom 8 considerations have remained consistent throughout the year, with smart home compatibility being the least important consideration for all surveys this year. We explored homeowner views on smart home technology for fenestration in detail in our Summer 2024 consumer report.

Overall Home Owner Priorities - Mean Result

Purchase importance (1 - not very / 5 - extremely)



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Hillarys are a partner of FENSA, with all homeowners who have their windows and doors installed by a FENSA Approved Installer eligible for an exclusive discount. As such, they have kindly provided us with some of their internal data for 2024 which shows some ongoing trends they have seen across products, materials and ages that provide a greater insight into what homeowners are looking for with their installations.

Comparison of Segments

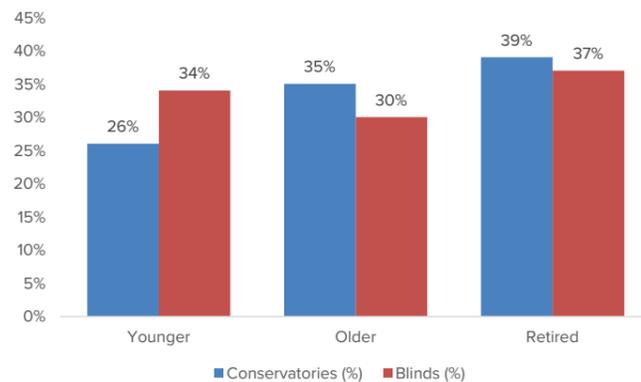
Segment	Age	Household Income	Products	Property Value & Type	Discretionary Income	Lead Effect	AOV
Younger Affluent	36 - 45	£70K - £99K	Shutters	£400K - £500K Detached 3 Bedroom House	£500 - £999	£401	£830
Older Affluent	46 - 55	£150K+	Curtains, Rollers, Romans	£1m - £2m Detached 5+ Bedroom House	£2,000+	£485	£929
Retired & Affluent	66+	£30K - £39K	Pleated, Rollers, Curtains, Verticals	£400K - £500K Detached 4 Bedroom House	£500 - £999	£436	£712
Younger Comfortable	26 - 35	£40K - £49K	Shutters, Venetians, Wooden Venetians	£200K - £250K Semi Detached / Terraced 3 Bedroom House	£250 - £499	£347	£764
Older Comfortable	56 - 65	£30K - £39K	Pleated, Shutters, Venetians, Verticals	£200K - £250K Semi Detached 3 Bedroom House	£500 - £999	£396	£706
Retired & Comfortable	66+	£20K - £29K	Verticals, Pleated, Venetians	£200K - £250K Semi Detached 3 Bedroom House	£125 - £249	£368	£573

The main table shows a breakdown of Hillarys customer segmentation looking at, age, household income, what type of products they buy, type of property, how much they spend on products and discretionary income.

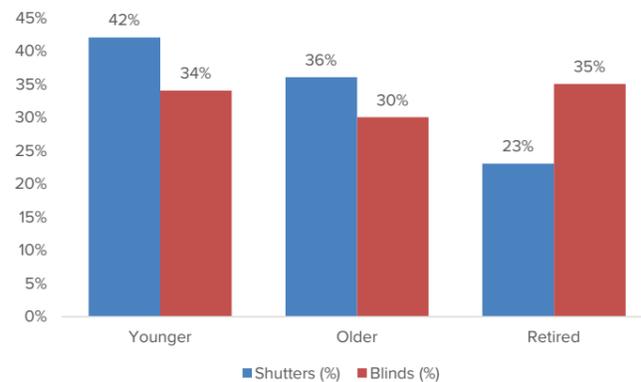
It is interesting to note, on the back of homeowner research shown by Keystone indicating similar preferences, that white remains the most popular colour for homeowners when it comes to conservatories, with the elder demographic preferring blinds and younger audiences preferring shutters.

White as the preferred colour of choice then continues across Hillarys blind collections followed by charcoal and Ivory. Their younger markets prefer Romans, Venetians and Wooden blinds whilst the retired market prefer Roller blinds and Verticals.

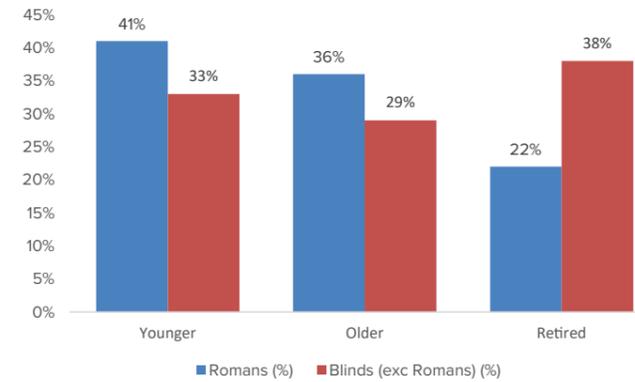
Conservatory Order Mix by Age



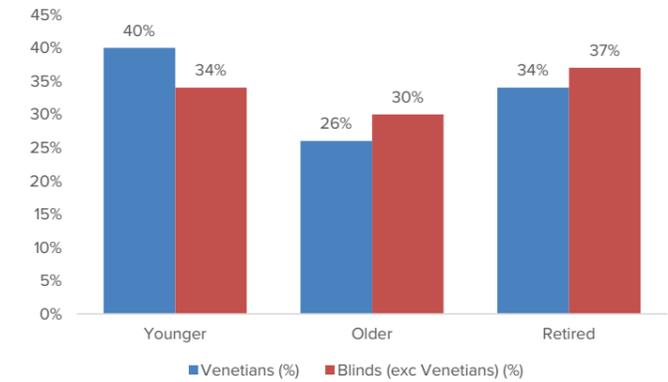
Shutter Order mix by Age



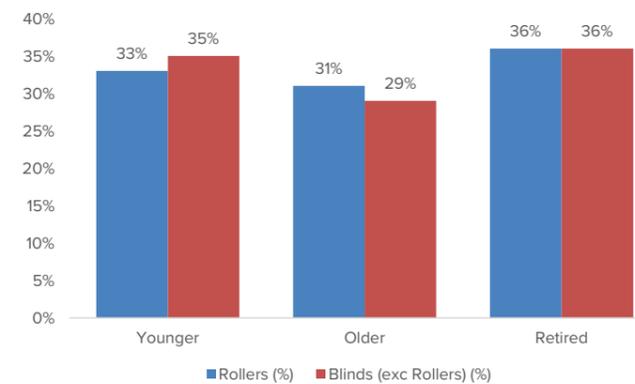
Romans Blinds Order Mix by Age



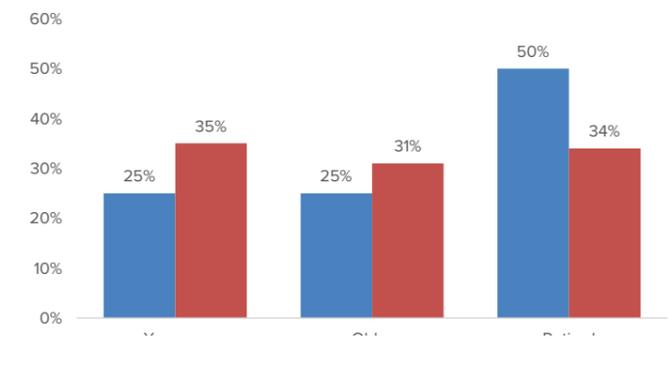
Venetian Blinds Order Mix by Age



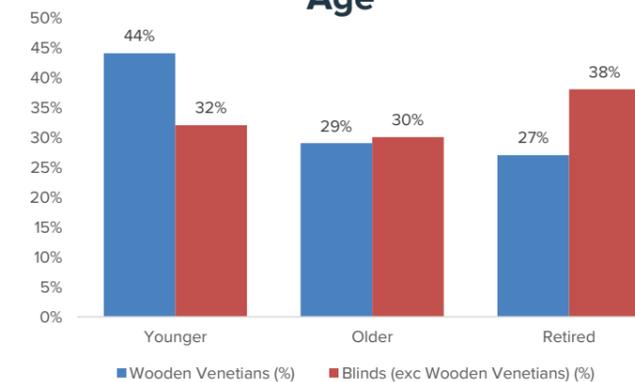
Roller Blinds Order Mix by Age



Vertical Blinds Order Mix by Age



Wooden Venetian Blinds Order Mix by Age





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