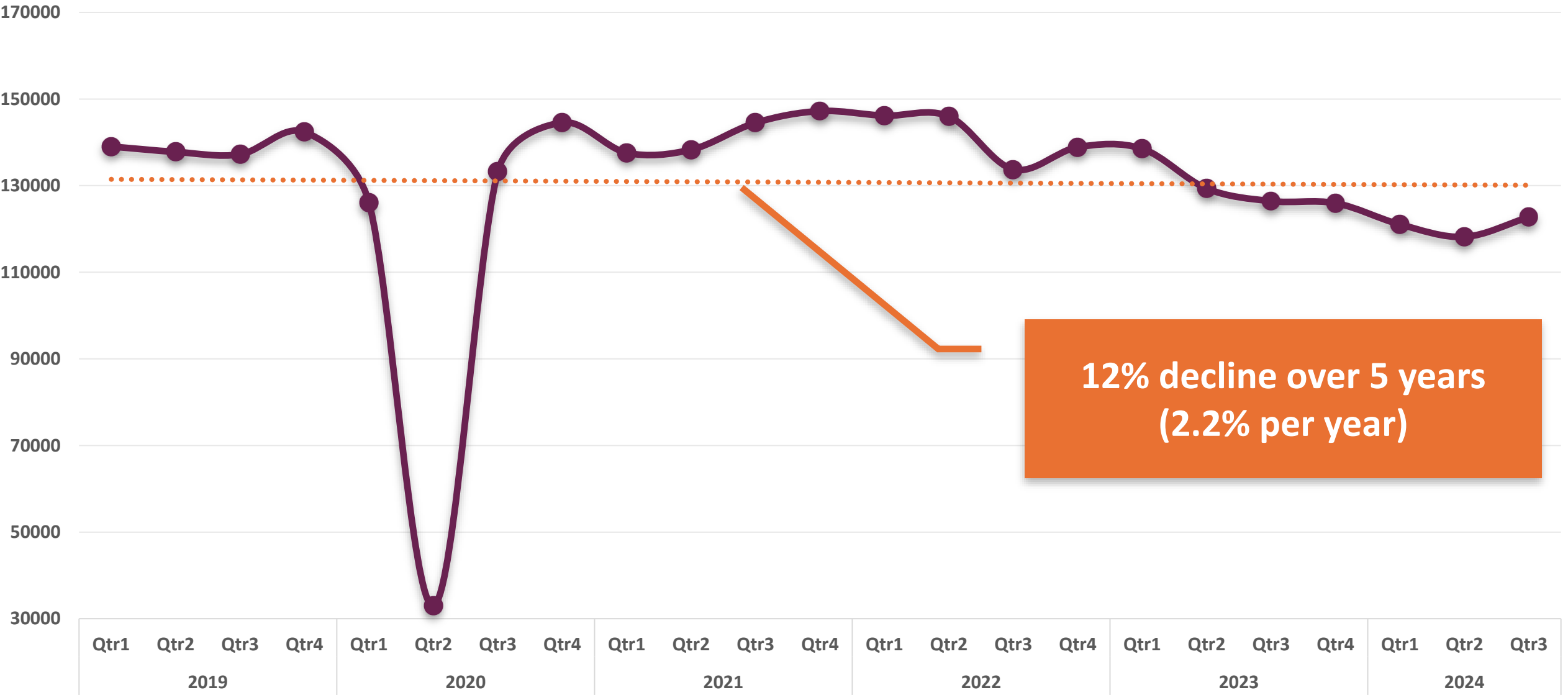


Market Knowledge Webinar



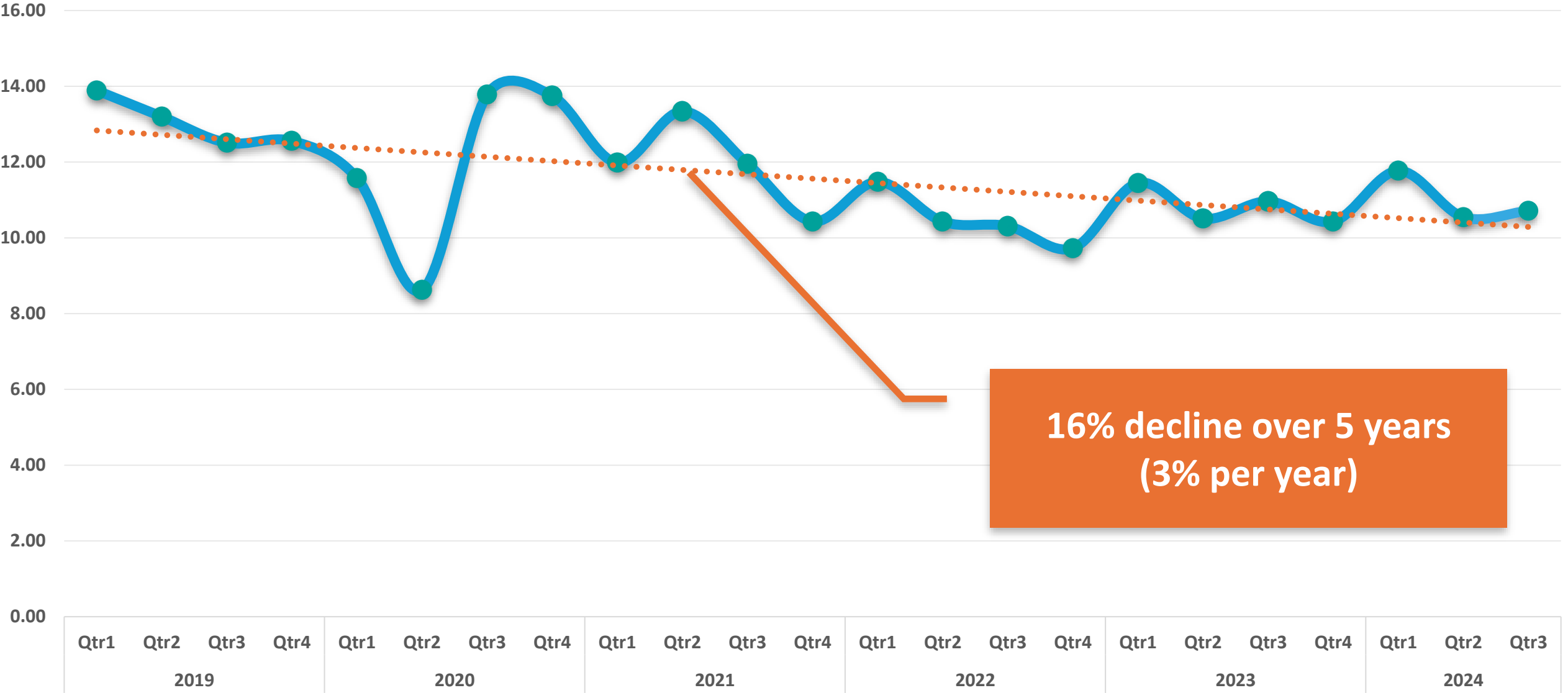
Looking Back

FENSA: Installation Registrations

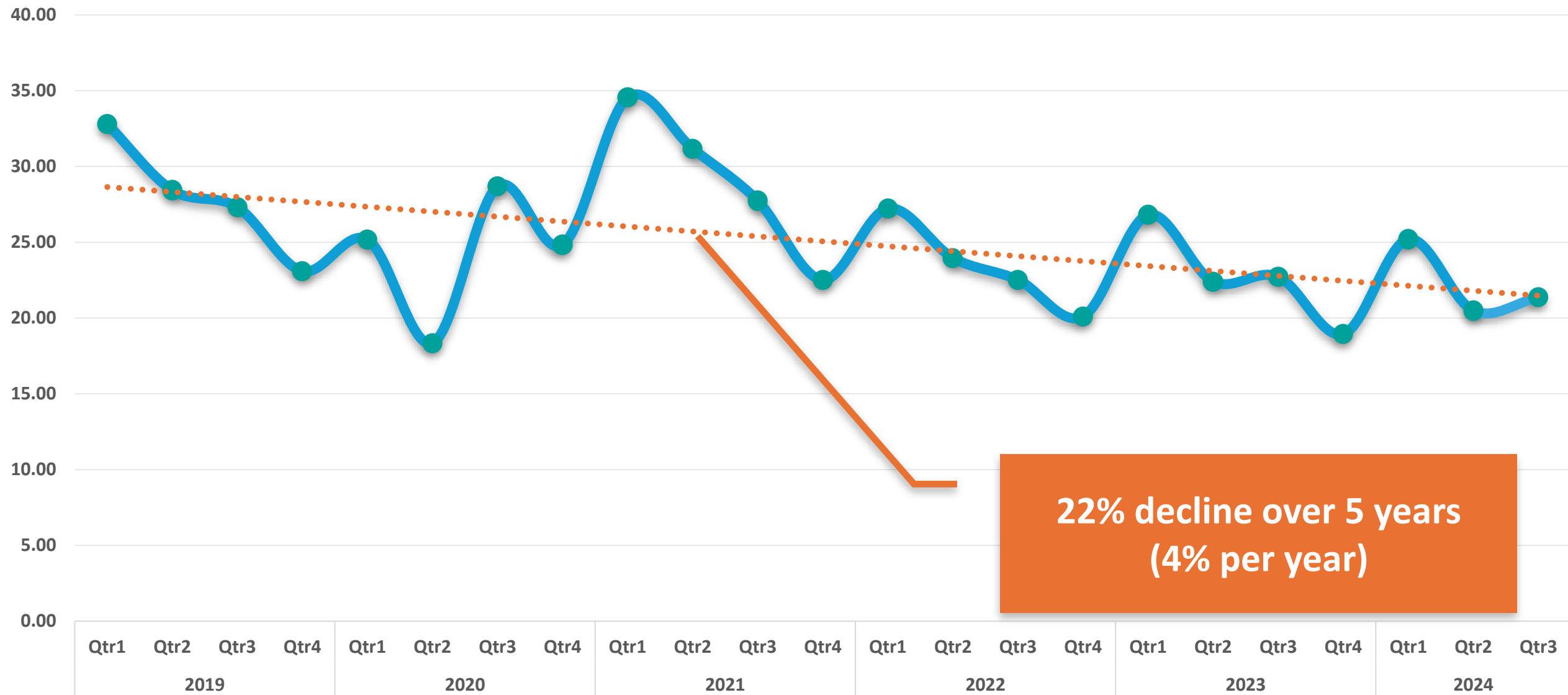


12% decline over 5 years
(2.2% per year)

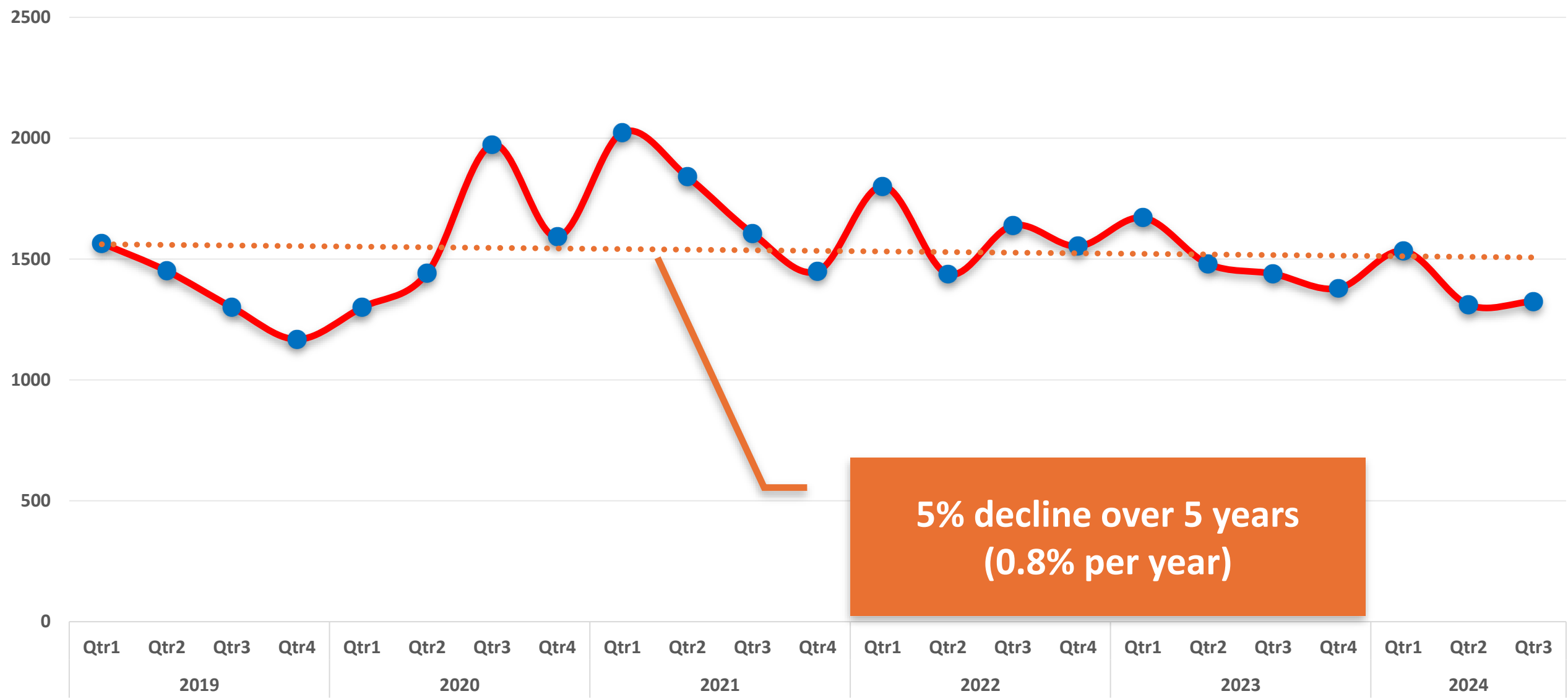
Business Pilot: Average Number of Sales



Business Pilot: Average Number of Leads

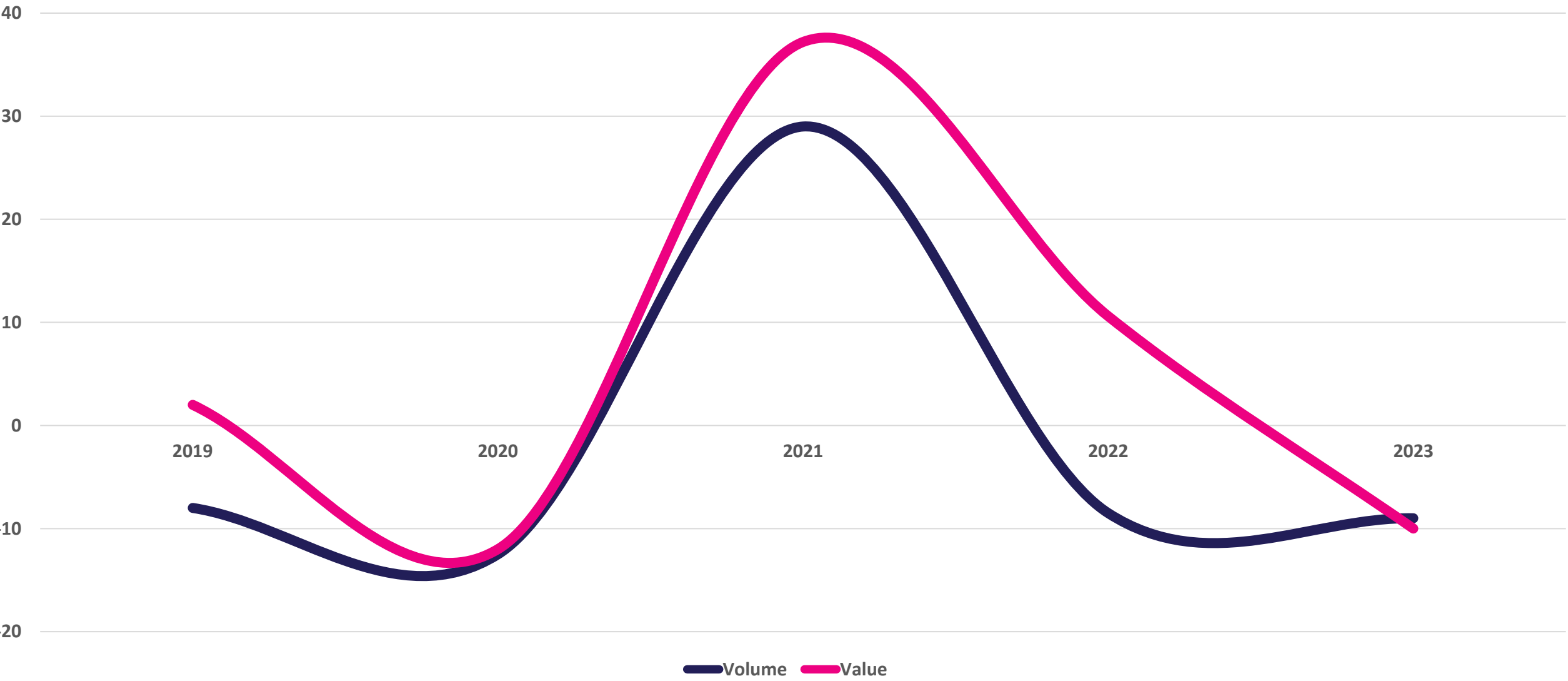


Google Search: Various Glazing Terms



5% decline over 5 years
(0.8% per year)

UK Profile Demand - % Variation Y-o-Y



What can we take from all this?

- Covid threw a real curve ball, but the market has now 'normalized'
- People look around more before enquiring
- The buyer is self educating more and more
- The market 'contraction' is probably not felt, due to a similar pattern in loss of installation companies not just the Safestyle and Everests

What else do we know...



4

Windows per Installation

3.86 Maximum

3.32 Minimum

3

Doors per Installation

Maximum 0.86

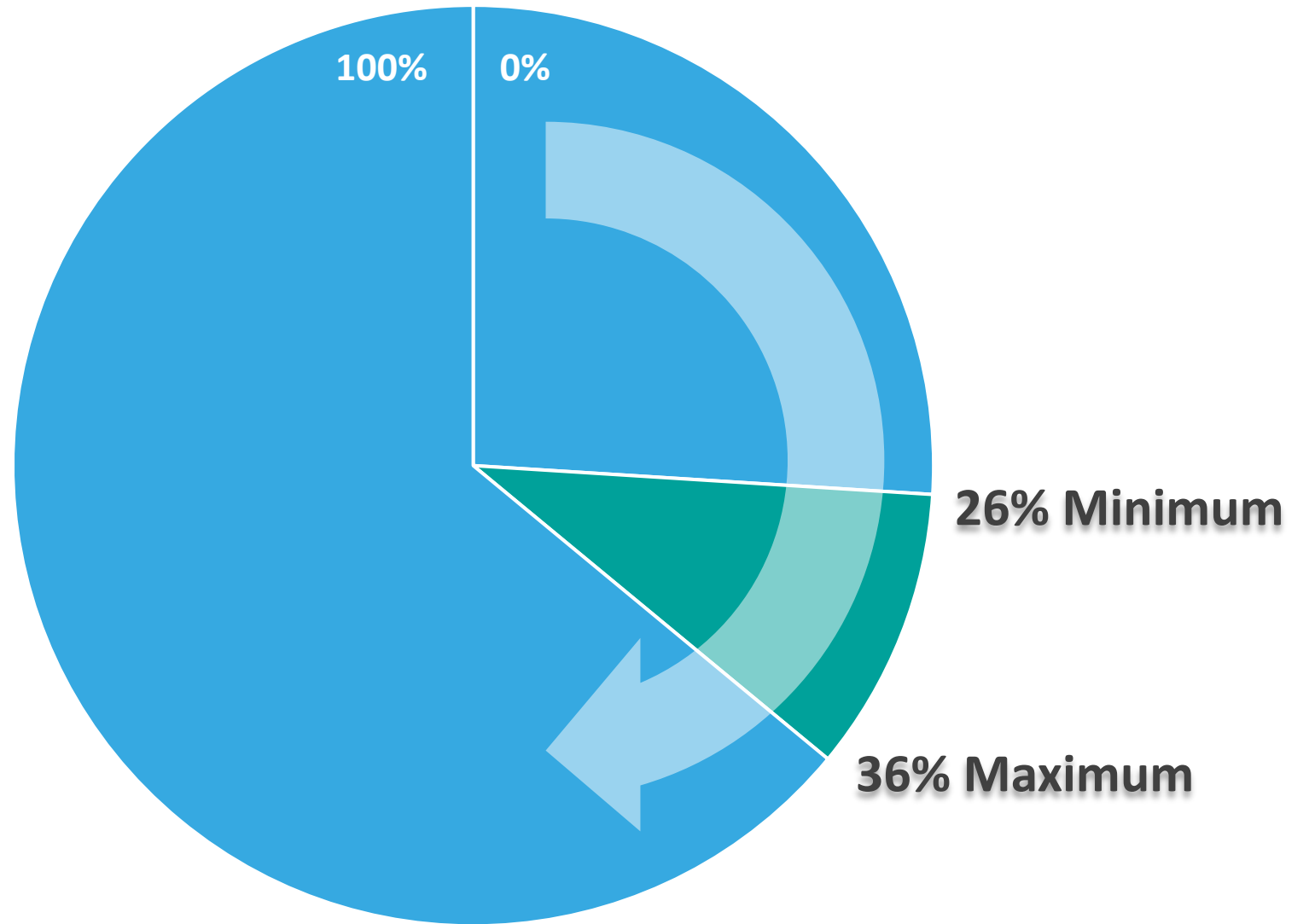
Minimum 0.75

1

0

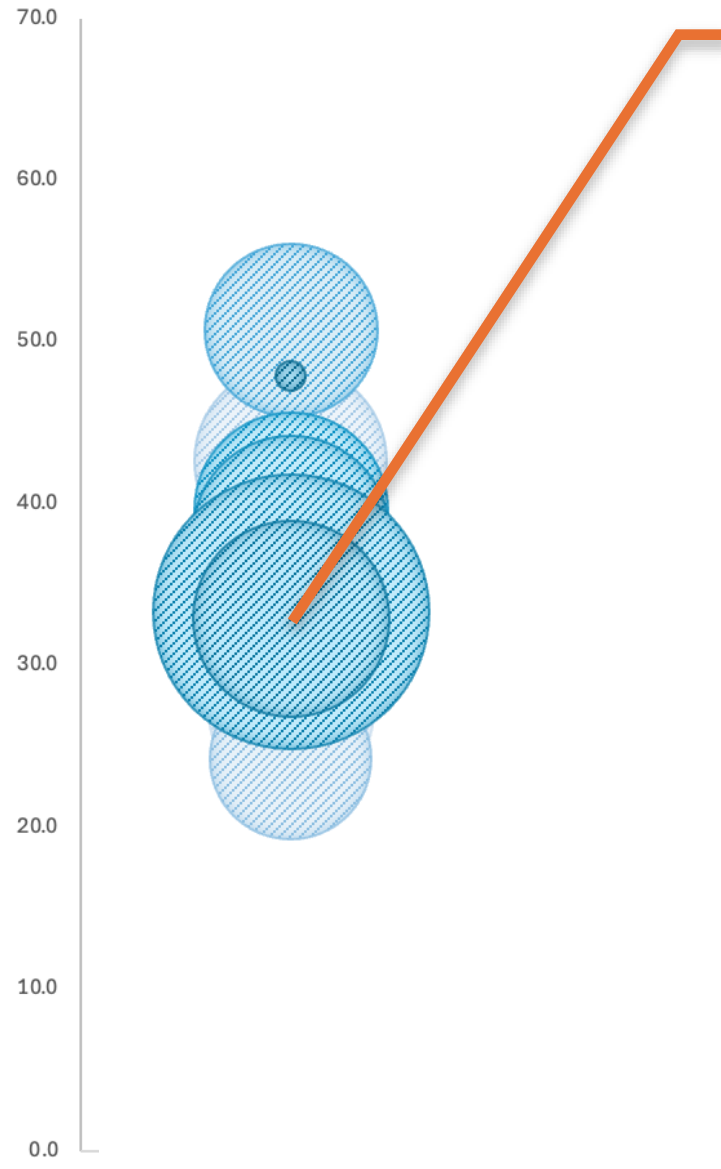
Average variation between 2018 & 2024

Business Pilot: Lead to Sale Conversion Rate



Business Pilot: Average Lead Time

25
min



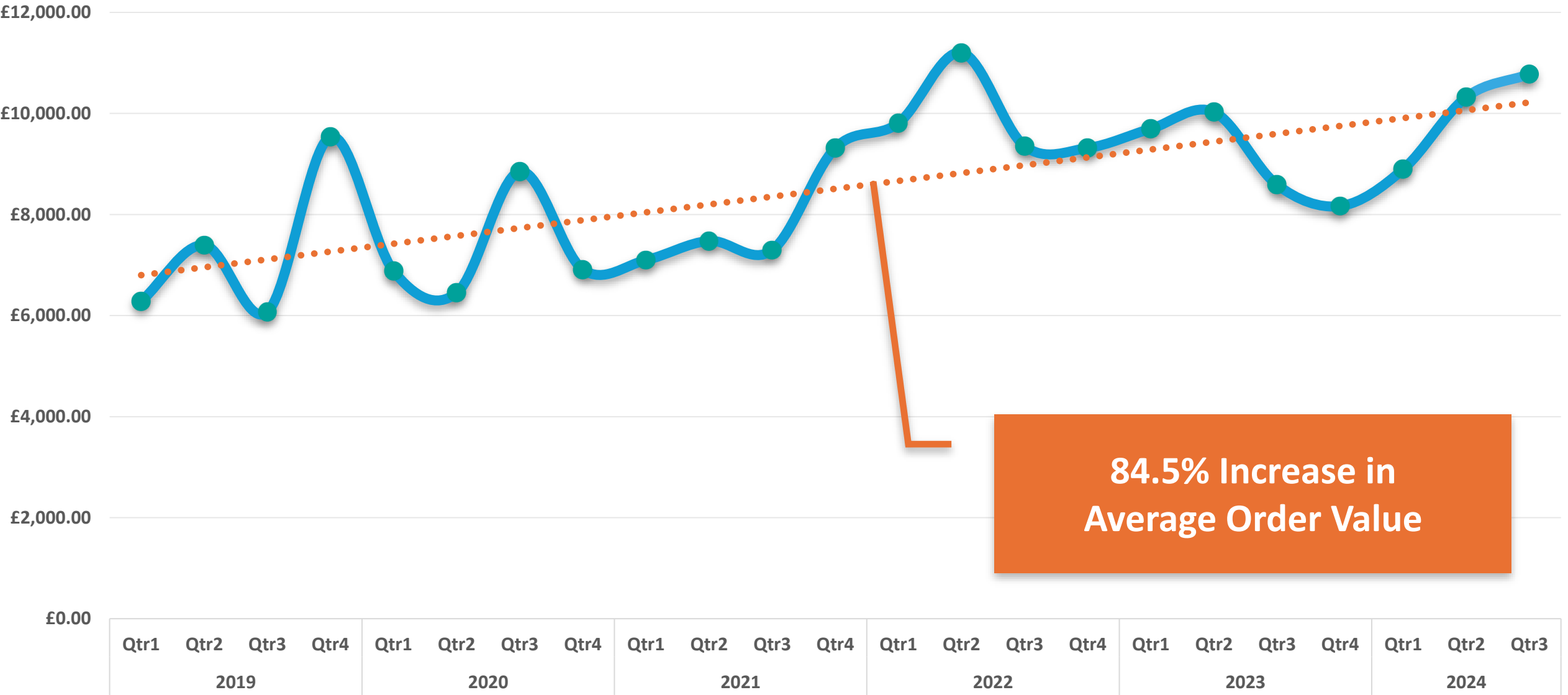
52
max

A lot remains static

Whilst some things have changed forever...

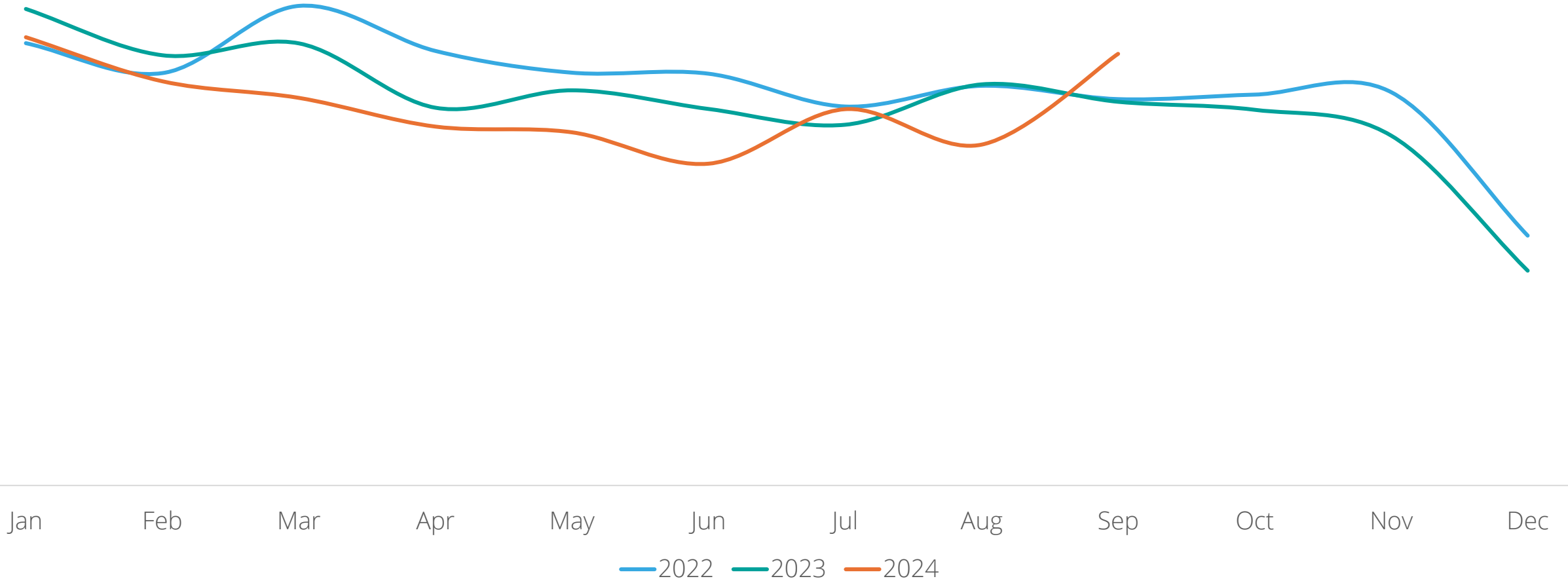


Business Pilot: Average Sales Value (£)

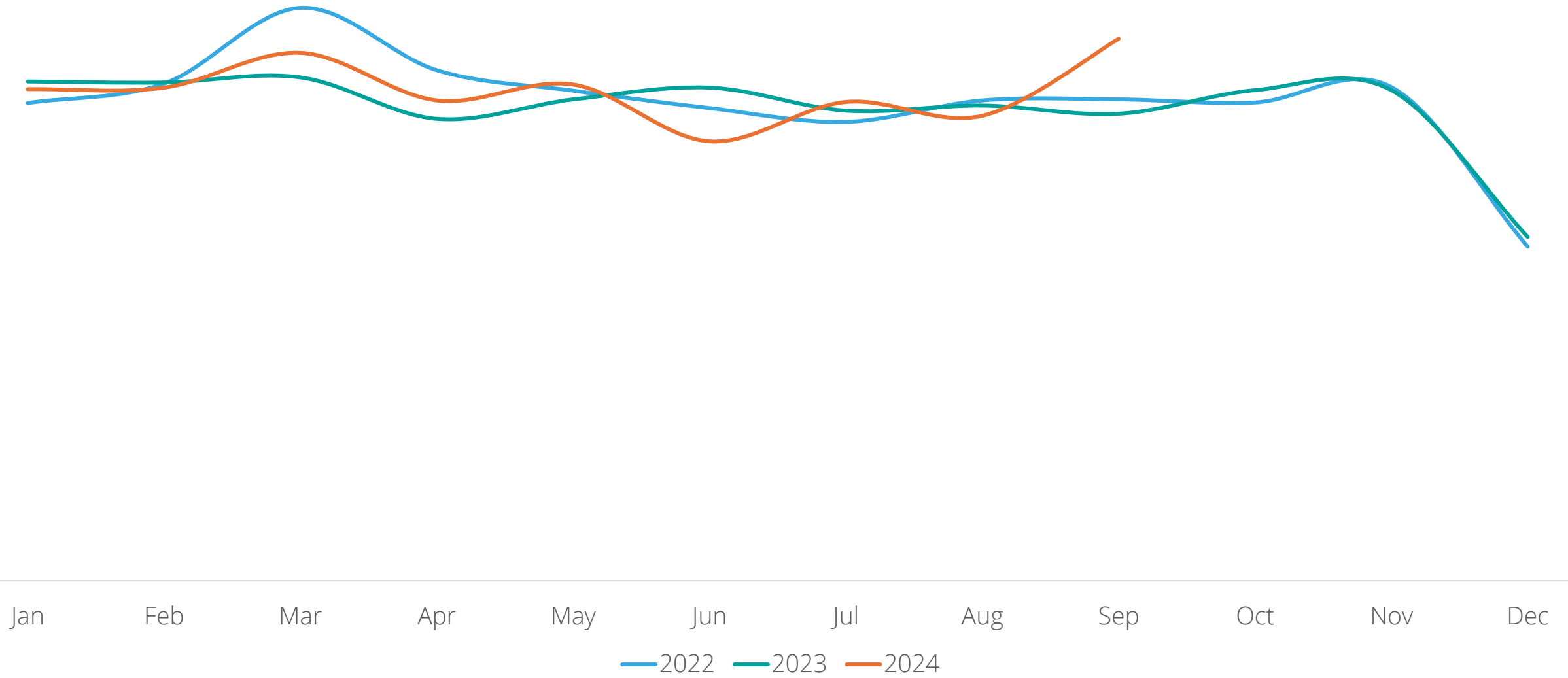


**So, let's look at the last couple
of 'post covid' years**

Leads



Sales



It is easier to see the seasonality when shown like this

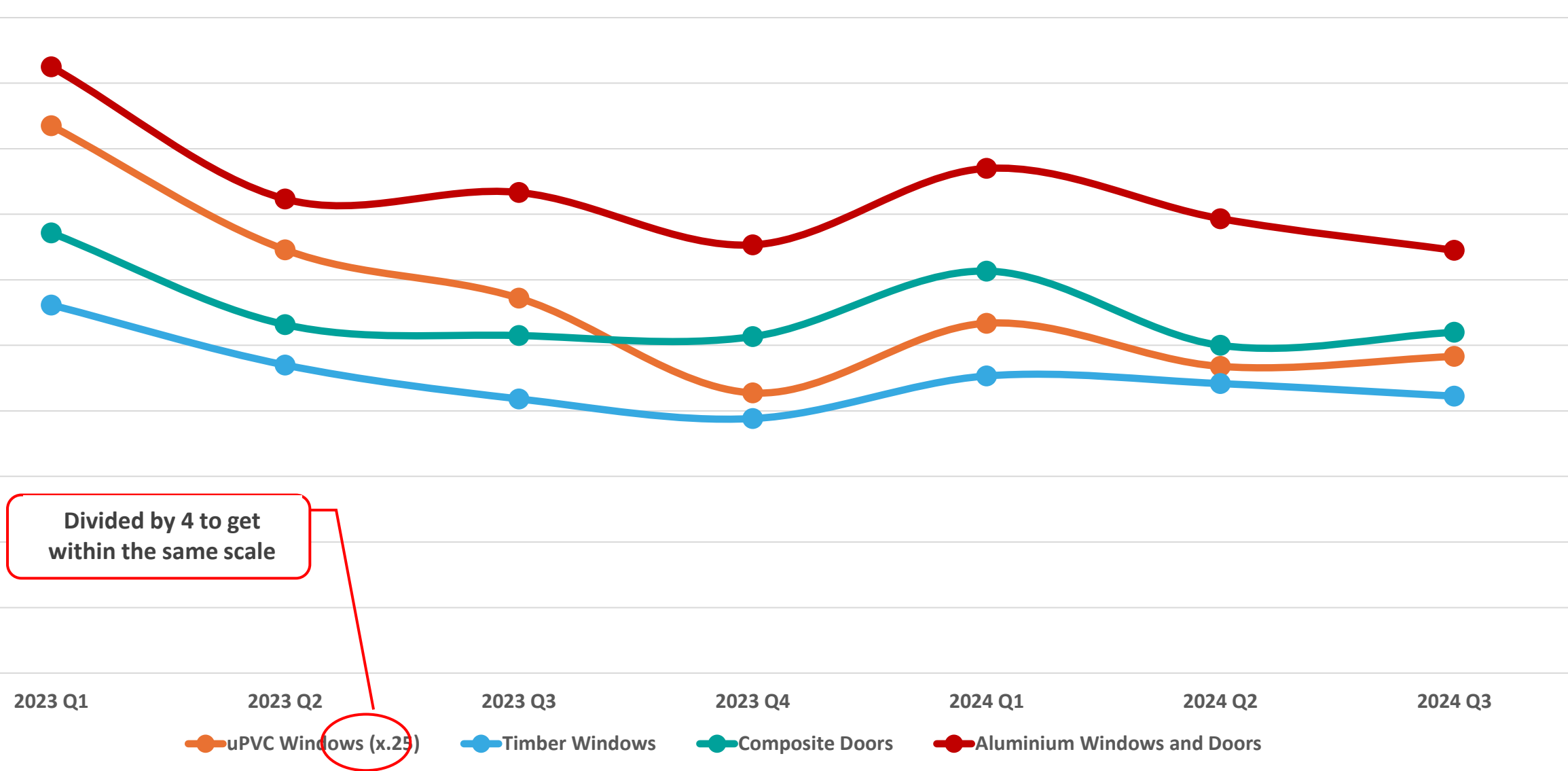
It helps us predict the future trends

**Of course, this could all look different
depending on the mix
of product you install**

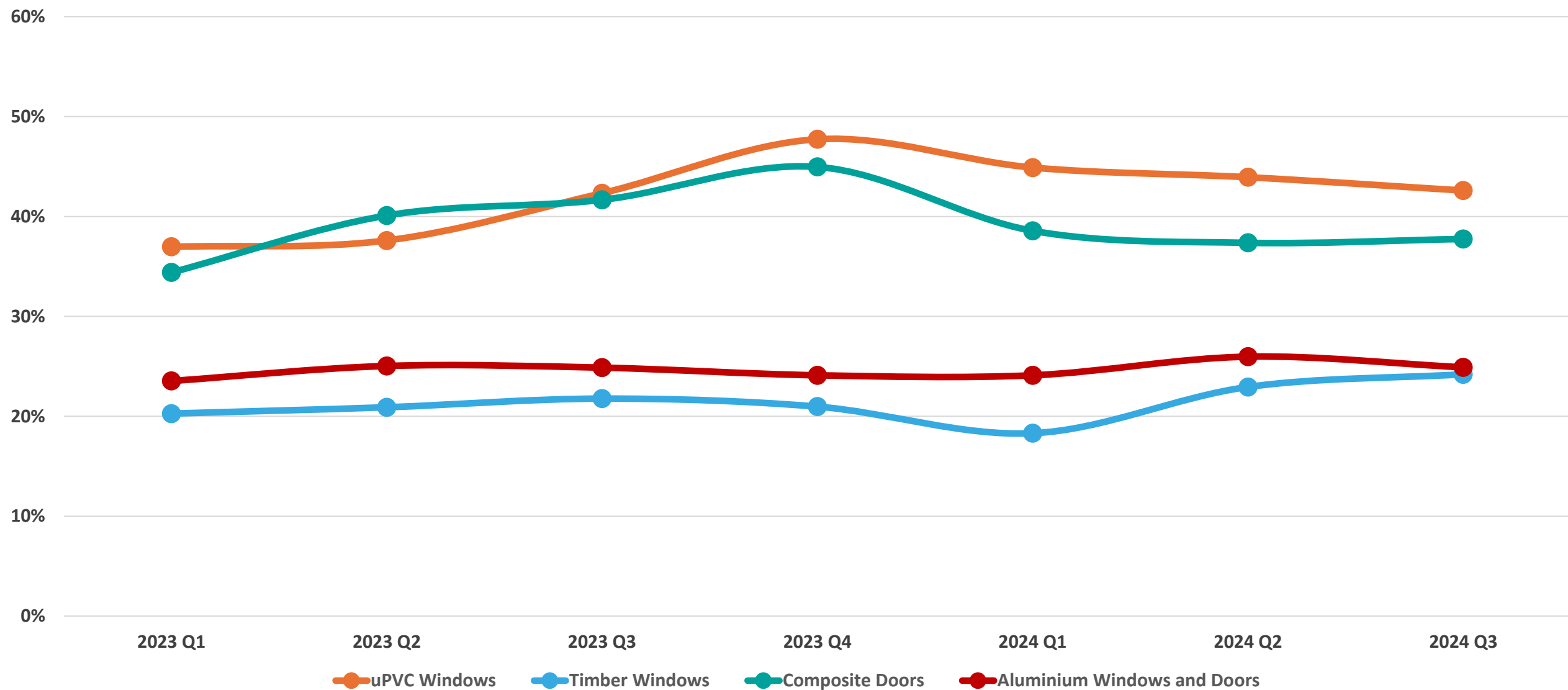
Let's find out...



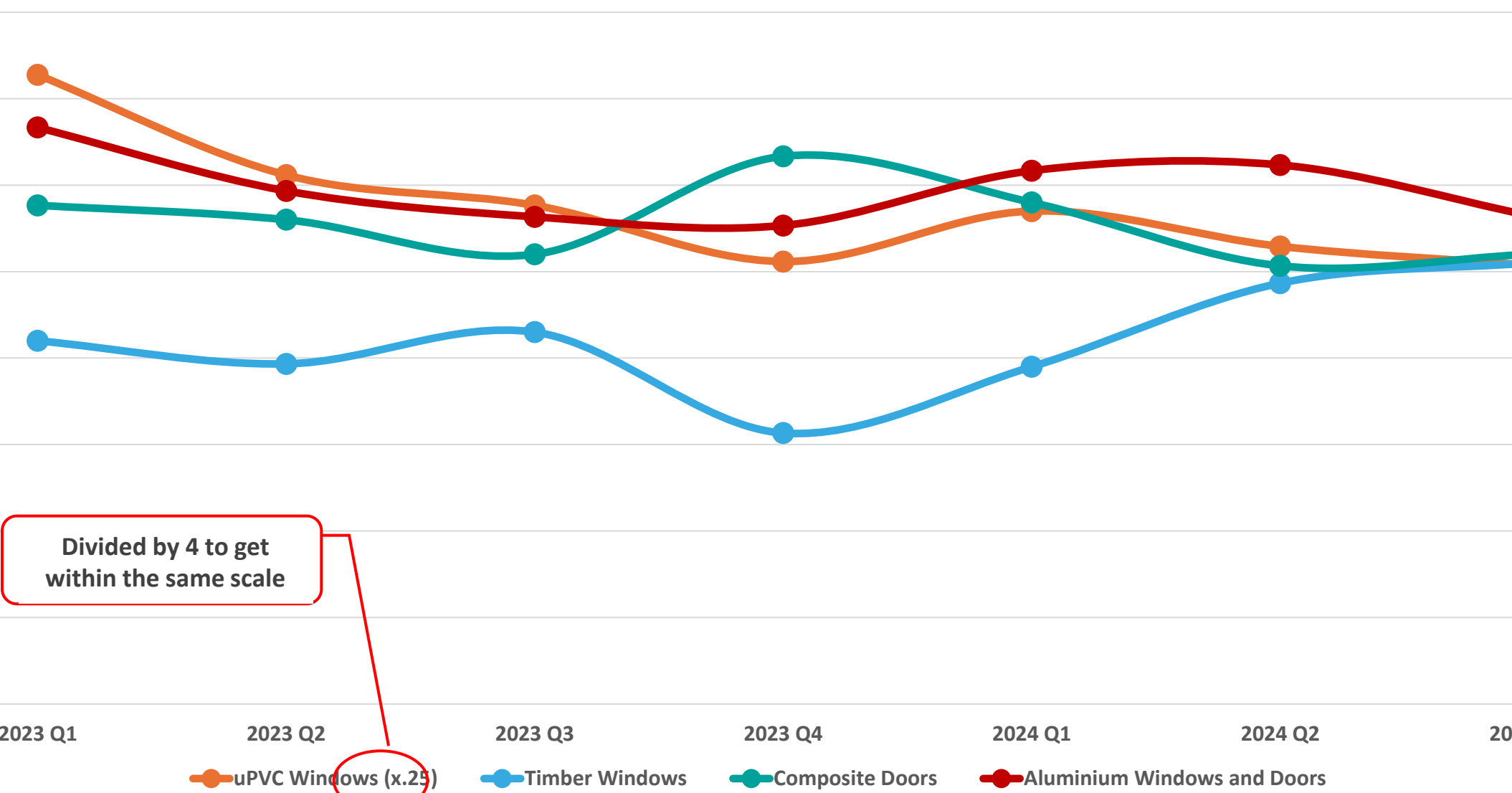
Business Pilot: Average Leads by Product



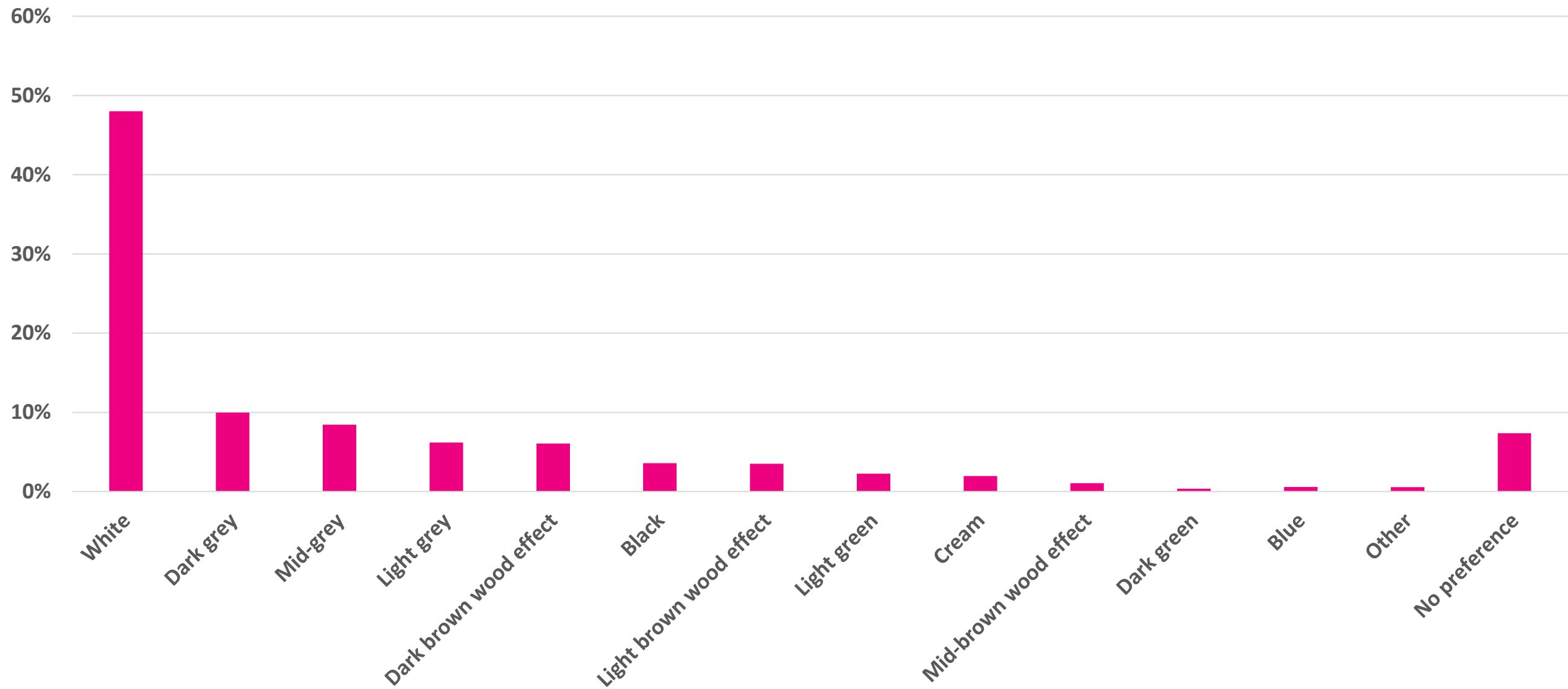
Business Pilot: Average Conversion Rates by Product



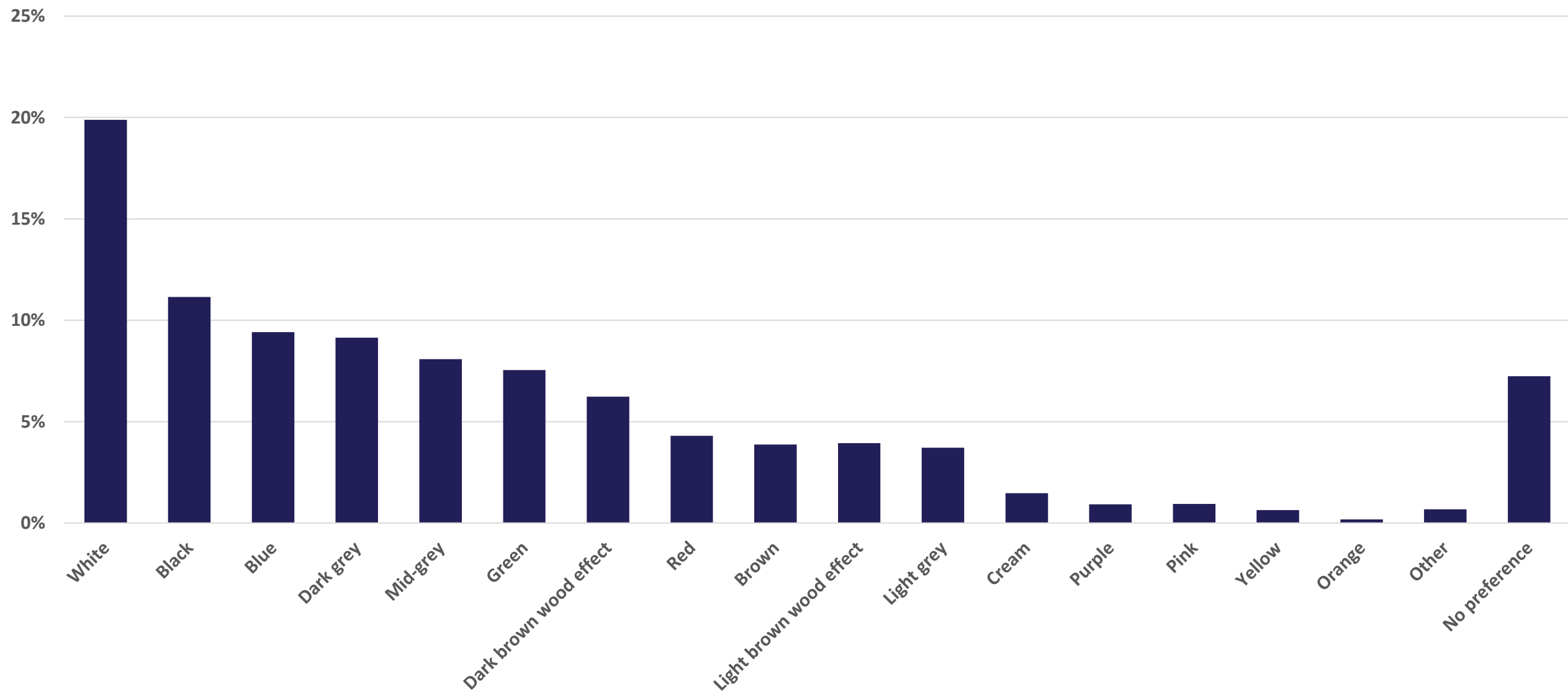
Business Pilot: Average Sales by Product



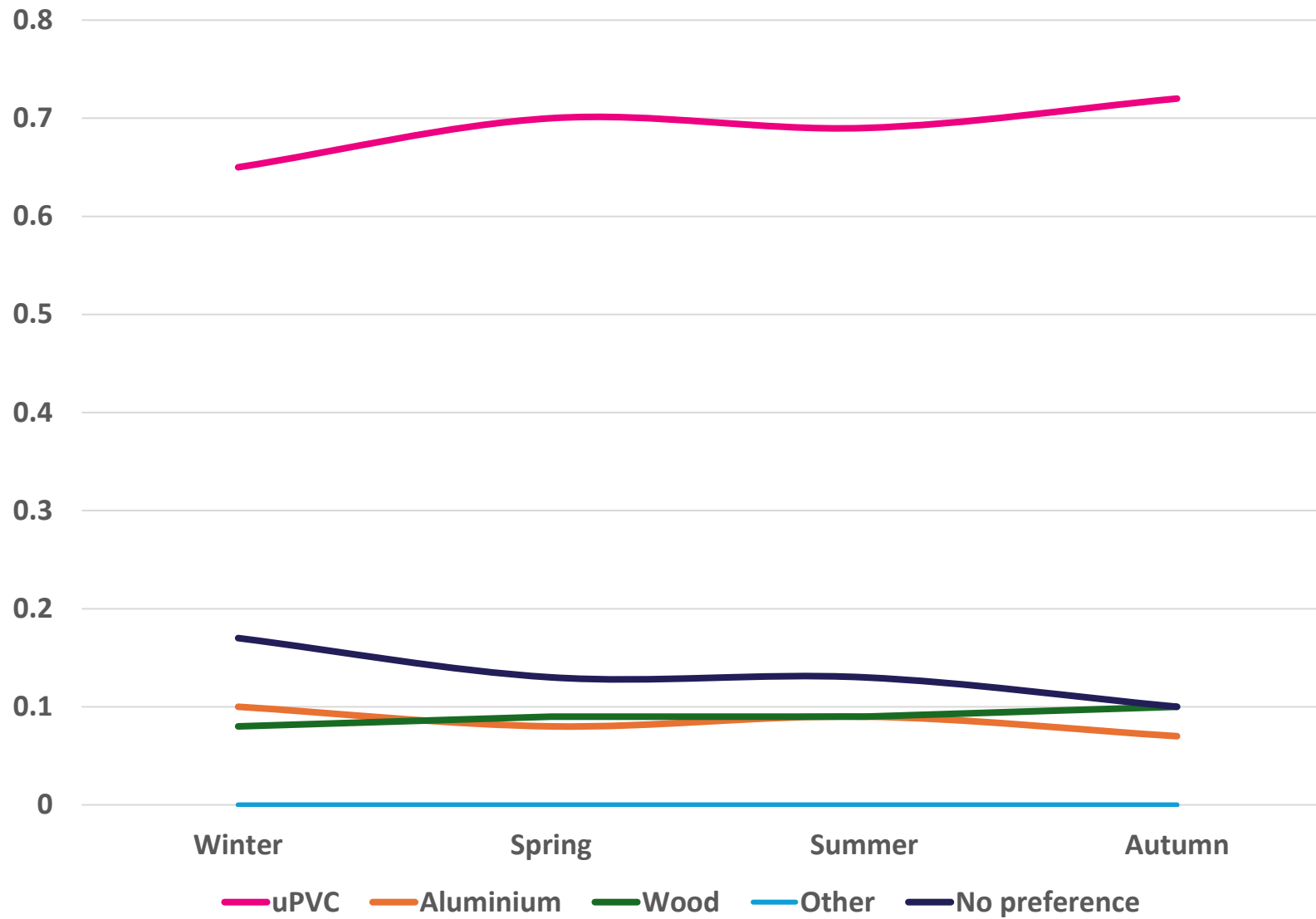
Window Colour Preference



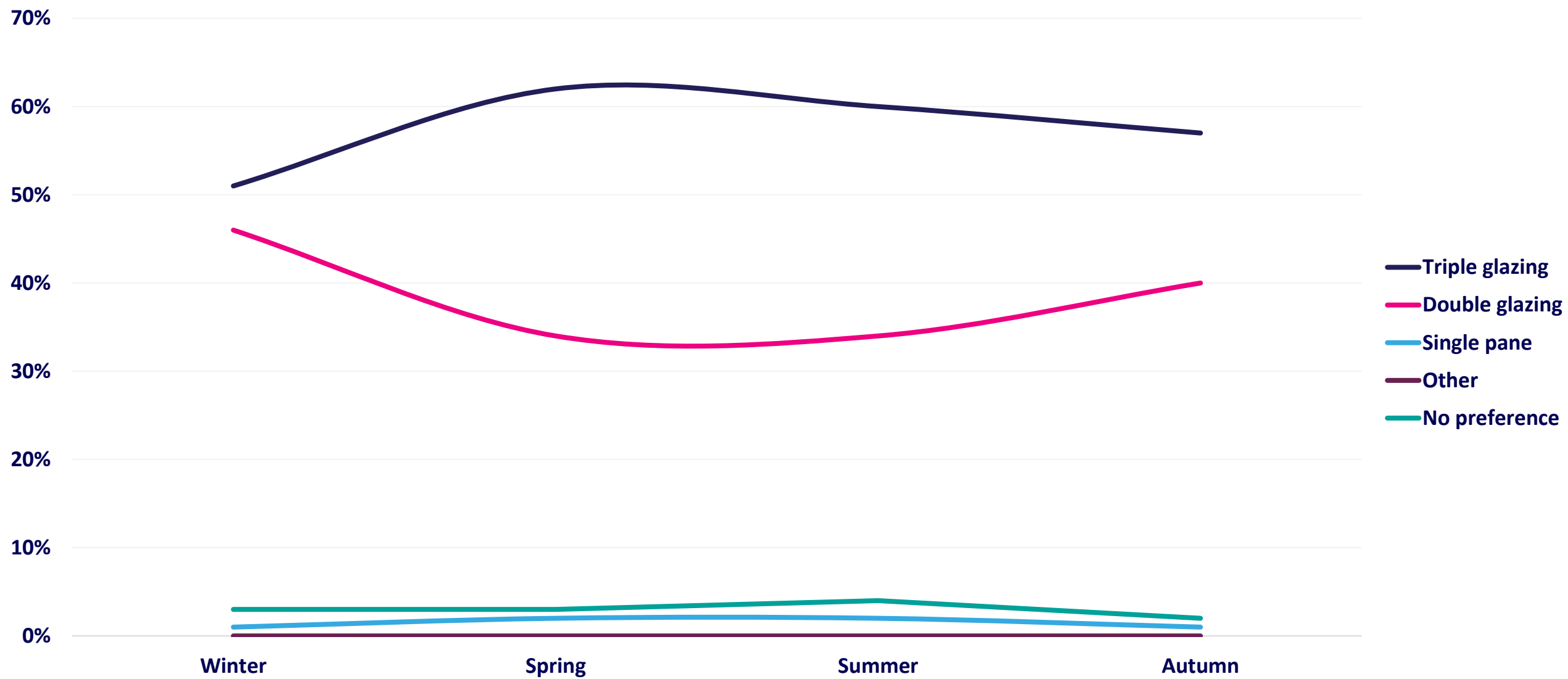
Door Colour Preference



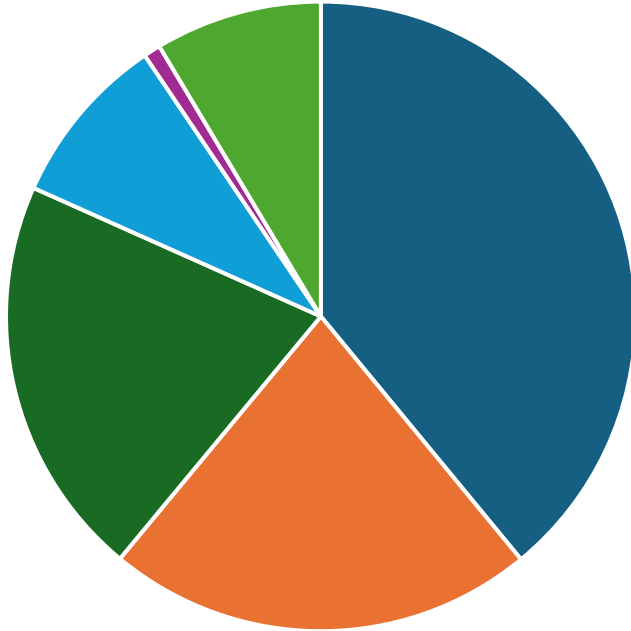
Window Material Preference



Glazing Preference

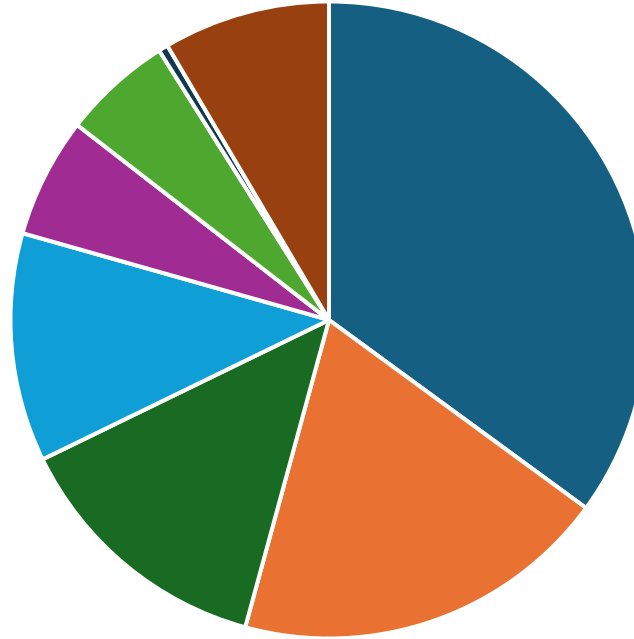


Window Preference



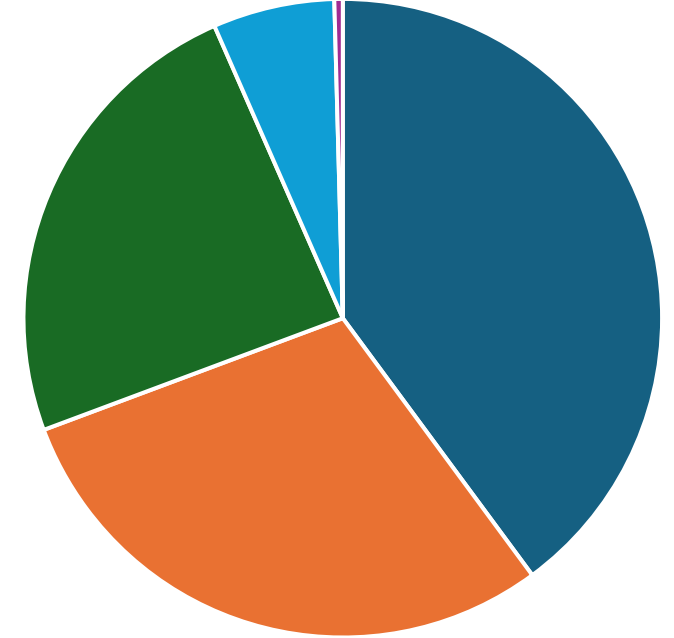
- Traditional casement windows
- Tilt & turn windows
- Flush casement windows
- Sliding sash windows
- Other
- No preference

Roof Preference



- Pitched roof - skylights
- Pitched roof - no glazing
- Flat roof - orangery style rooflight
- Fully glazed conservatory roof
- Flat roof - flat rooflight
- Flat roof - no glazing
- Other
- No preference

Patio Door Preference



- Sliding patio doors
- French doors
- Bifold doors
- No preference
- Other

What can we take from that?

- **uPVC is significantly more popular, but also far more susceptible to economic changes**
- **Timber and Aluminium are a completely different model to uPVC/composite with longer lead times and lower conversion rates**
- **We have a clear idea of what the consumer is looking for**

What we know so far

FENSA 3%

The industry is currently performing above this level, so whether we are doing well or not so well, is a matter of perspective. If we expected and planned for 3% YoY contraction, we are currently doing well. If we expected things to continue from the Covid Boom, things look different!

Business Pilot Barometer Seasonality

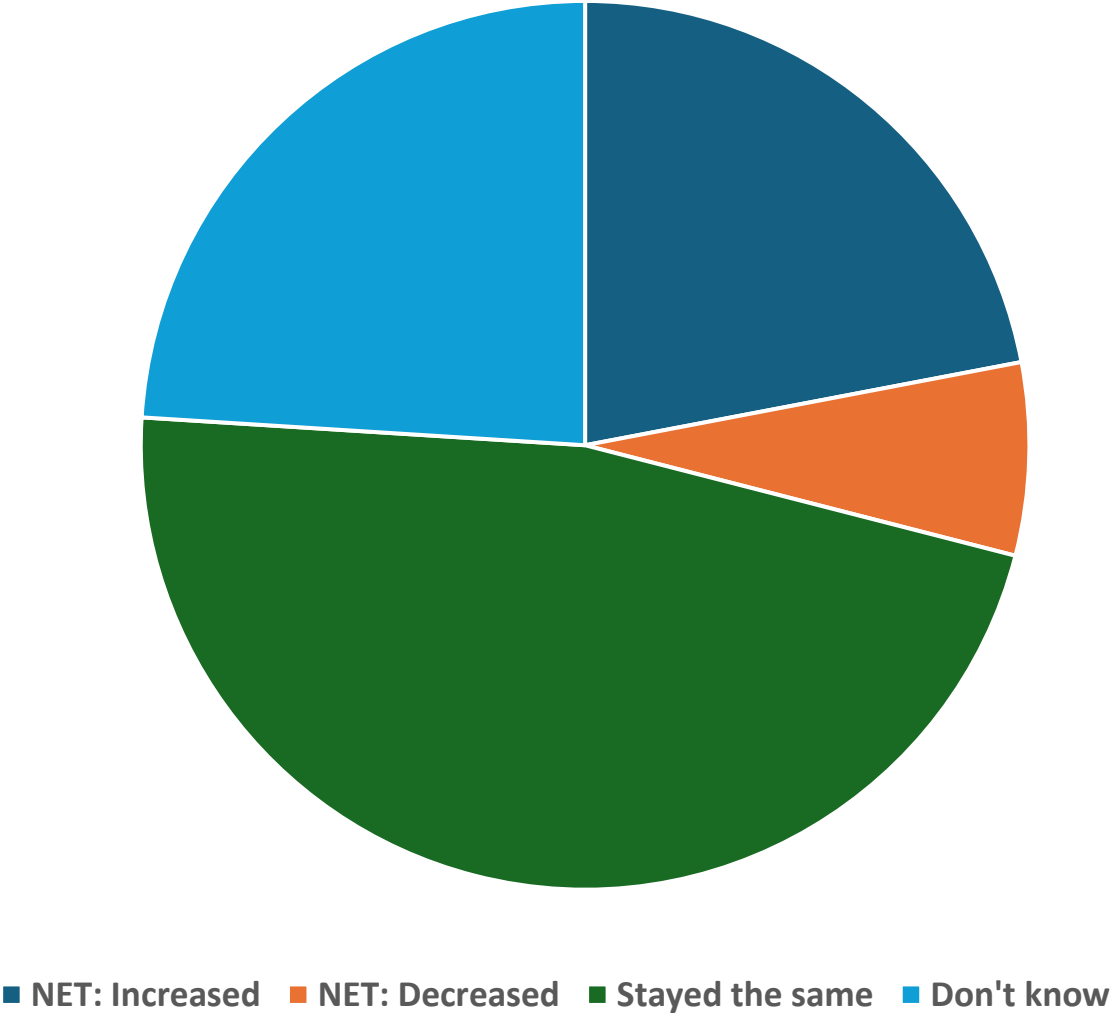
We need to compare apples with apples. And when we do, the small contraction in the market is easy to see. When we compare differing periods (covid vs normal and peak vs off peak), we lose perspective.

Keystone Forward Indicators

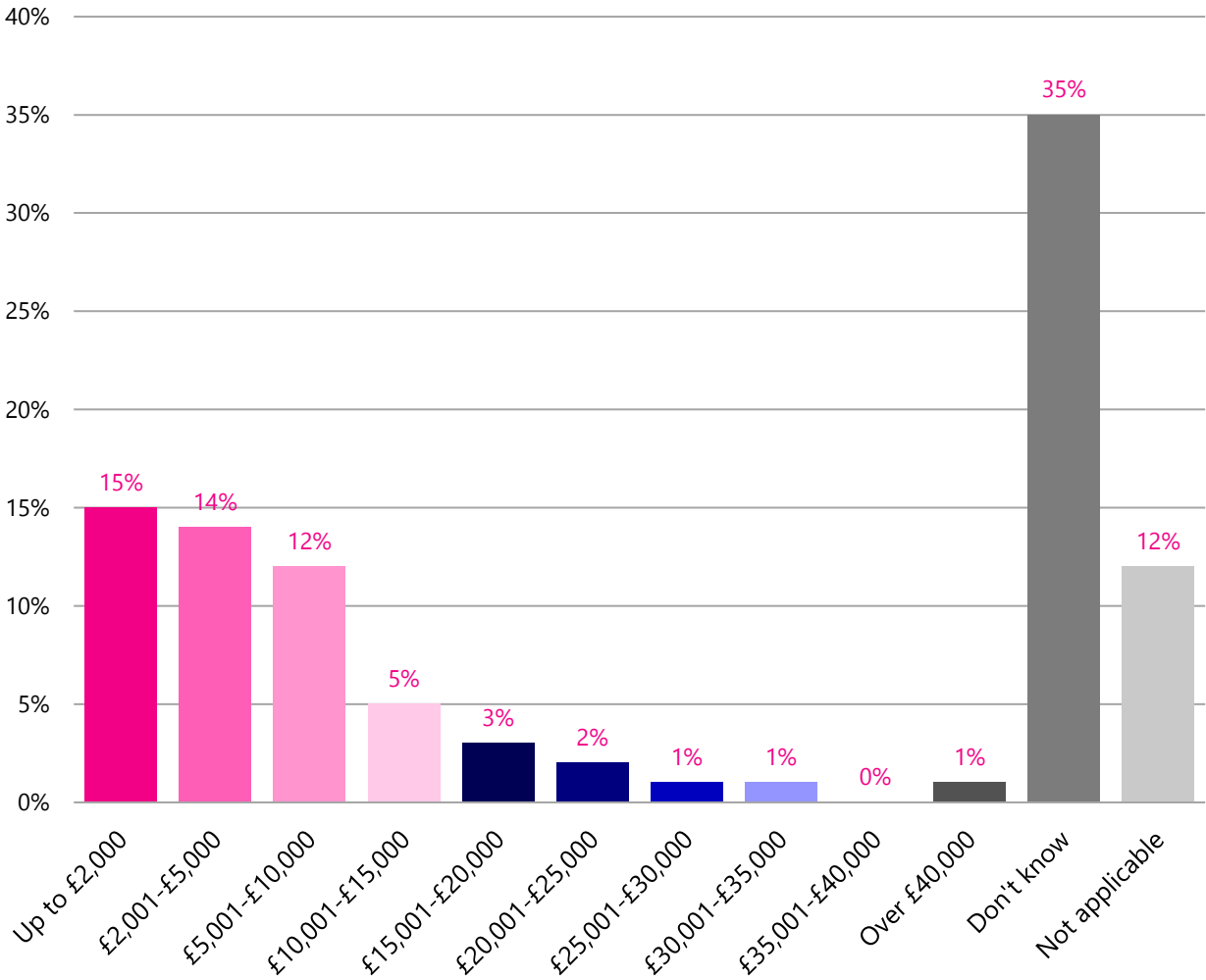
When we align our sales and marketing messages to what consumers are looking for, our own future becomes brighter.

Although we are sharing industry data, the only data that you will 'feel' is that of your own business. You can help to improve that, despite what the rest of the industry is doing.

Homeowner Budget Change - 2025 vs 2024



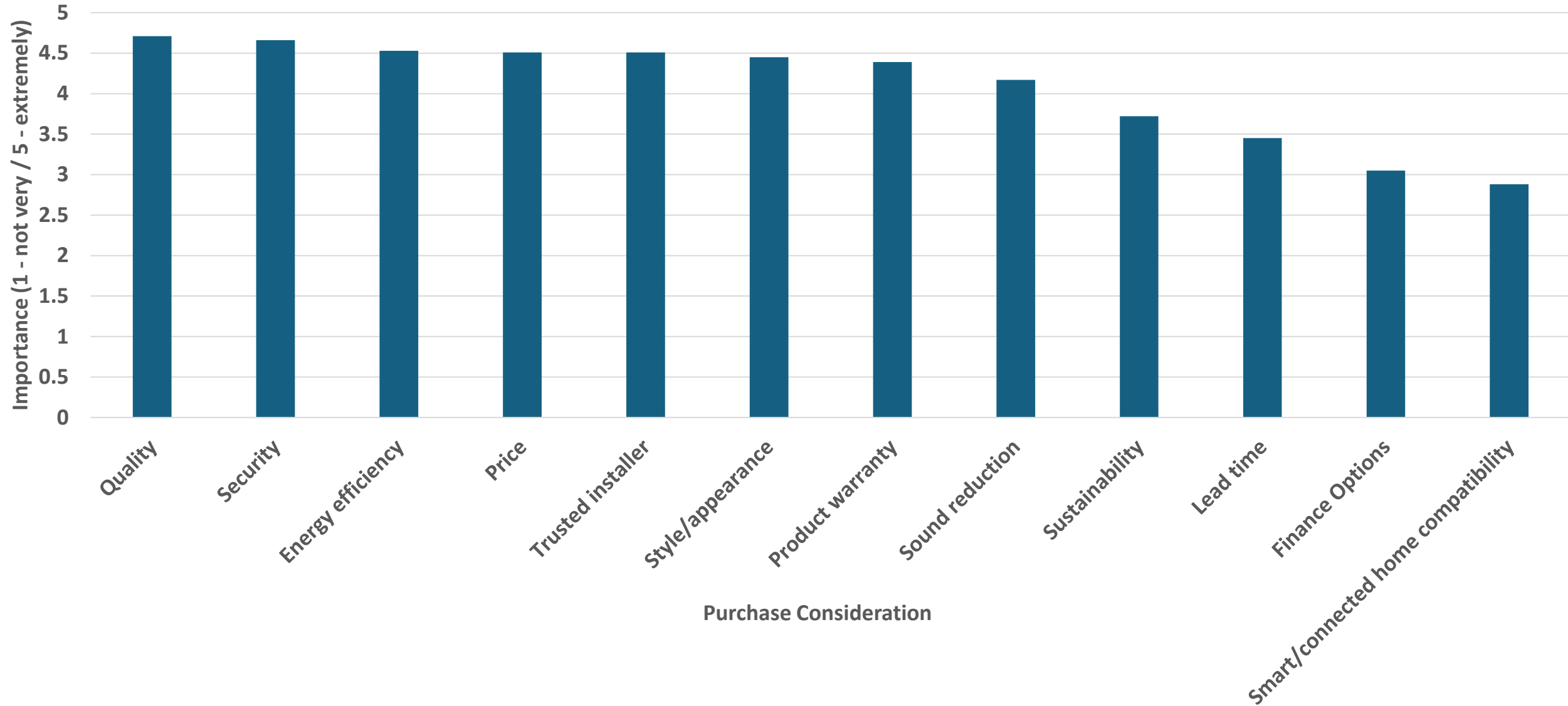
Planned 2025 Home Improvement spend



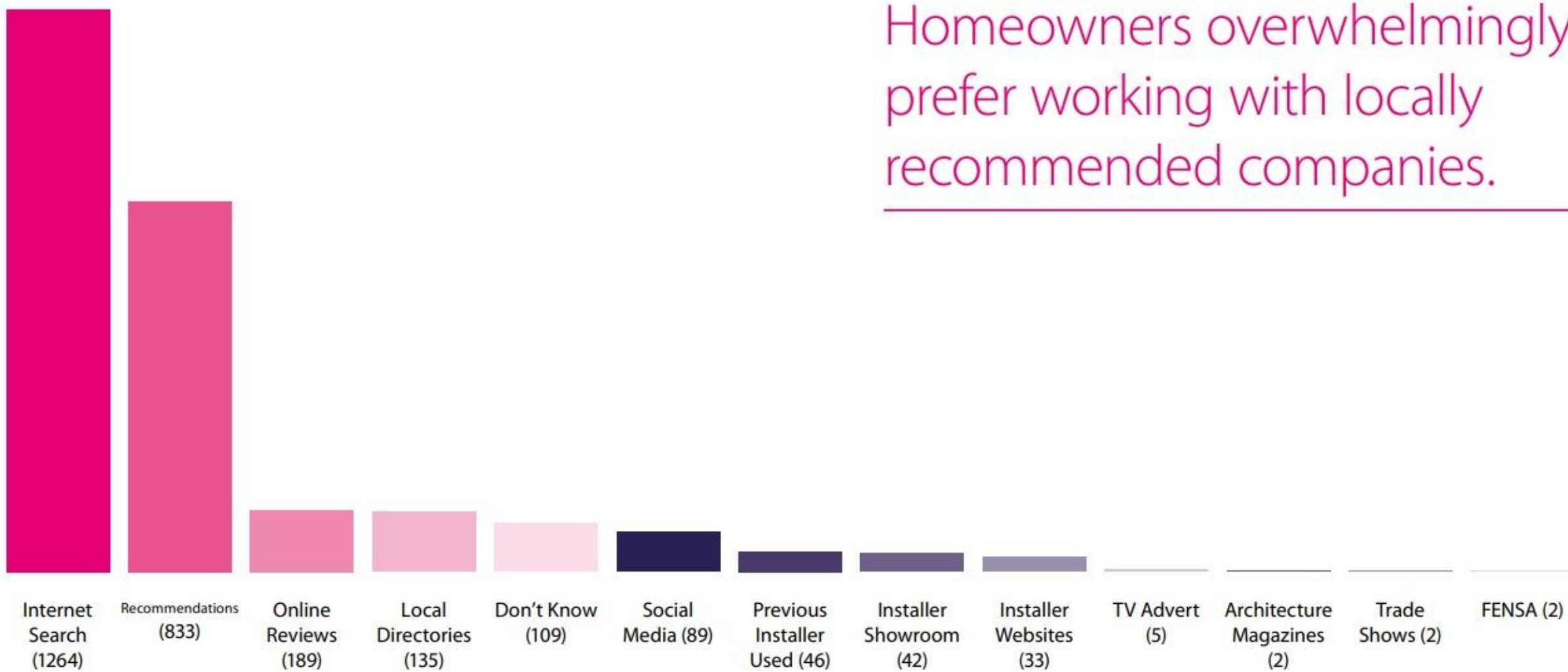
Homeowner Spend – Project Type Split

	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%

Overall Homeowner Priorities



Homeowners overwhelmingly prefer working with locally recommended companies.



**Averages are made up of better
and worse performing individual
companies.**

**How can you
outperform the statistics?**

Questions