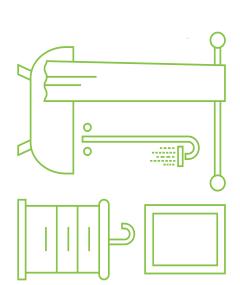


TRENDS STUDY J.S. HOUZZ BATHROON

NOT FOR IMMEDIATE RELEASE; EMBARGOED UNTIL SEPTMEBER 28 9:00 AM ET



Contents

Big Ideas and At a Glance

About Bathroom Renovating

Homeowners

Budget and Spend

Scope and Pro Hiring

Look and Feel

Products and Finishes

Methodology

Appendices

3-4

5-7

8-12

13-16

17-20

21-29

30-31

32-36



Big Ideas

STATEMENT SHOWERS; LOSE THE TUB

bathtub (27%) to make room for a larger shower (91%). those making master shower updates (81%), more than half increase its size. Many homeowners remove their master Showers are the top feature to splurge on during a master bathroom renovation (42% of renovating homeowners). Of

AGING IN PLACE DRIVES SPEND

accessibility features, as three in five have no plans to move in the next 10 years 100 square feet (\$22,800 vs. \$12,500, respectively). Older homeowners are significantly more likely to integrate Homeowners older than 54 spend nearly twice as much as those under 35 on renovations of master bathrooms over

MILLENNIALS CRAVE MORE SPACE

master bathrooms than are other homeowners and are more likely to be unhappy about the size when not changing it. size as is find it too small for their needs (30%). Millennial homeowners (ages 25 to 34) are more likely to increase their One quarter of homeowners opt to increase their master bathrooms. Many of those who are keeping the bathroom

SAN FRANCISCANS SPEND THE MOST ON REMODELS

averaging \$34,100 for a major remodel of a larger master bathroom (over 100 square feet), compared with \$21,000 nationally. Overall, costs vary significantly by scope of remodel, size of master bathroom and regions Among the top 20 U.S. metro areas, homeowners in San Francisco spend the most on a master bathroom remodel,

TOILETS AND TECH

A growing number of homeowners say they use mobile devices in their bathrooms at least once a week (64% in 2017 vs. toilets and 12% of upgraded showers boasting these features (compared with 24% and 9%, respectively, in 2016) 58% in 2016). Also, the demand for high-tech bathroom features grew significantly year over year, with 29% of upgraded



At a Glance

Renovated Master Bathroom Characteristics

Top Bathroom Styles After Renovations (among those changing style)	Colors (among renovating homeowners)	Wall & Flooring Materials (among homeowners updating showers, wall finishes or flooring)	Shower & Toilet Types (among renovating homeowners upgrading shower or toilet)	Scope Details (among renovating homeowners)	Pro Hiring (among renovating homeowners)	Average Remodel Spend (on a major remodel of a larger master bathroom (101+ sq. ft.))
#1 Bathroom Style: Contemporary 25% -1pp#	#1 Wall Color: Gray 35% +3pp*	#1 Shower Wall Finish: Ceramic or porcelain tile 65%	#1 Shower Type: Alcove 55%	Increase Bathroom Size 25% +1pp#	Overall Hiring 86% -4pp#	Overall \$21,000
#2 Bathroom Style: Transitional 17% +1pp#	#1 Flooring Color: Gray 31% +2pp*	#1 Shower Flooring: Ceramic or porcelain tile 52%	#2 Shower Type: Corner 27% +1pp#	Increase Shower Size 55% -13pp#	#1 Pro Type Hired: General contractor 52% -3pp#	Age group: 25-34 \$12,500
#3 Bathroom Style: Modern 15% -1pp#	#1 Countertop Color: White 40% +2pp#	#1 Non-Shower Wall Finish: #1 Non-Shower Flooring: Ceramic or porcelain tile Ceramic or porcelain tile 63%	#1 Toilet Type: Comfort-height 68% -1pp#	Change Layout 43%	#2 Pro Type Hired: Bathroom remodeler 19%	Age group: 35-54 \$20,100
#4 Bathroom Style: Traditional 13% -2pp#	#1 Cabinet Color: White 38% +1pp#	:#1 Non-Shower Flooring: Ceramic or porcelain tile 63%	#2 Toilet Type: High-efficiency 50% +2pp#	Change Style 90% -6pp#	#3 Pro Type Hired: Bathroom designer 13% -1pp#	Age group: 55+ \$22,800

#Reflect percentage point difference between 2017 and 2016 study findings; shows only statistically significant differences at 90% confidence levels (see 2016 study).



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4

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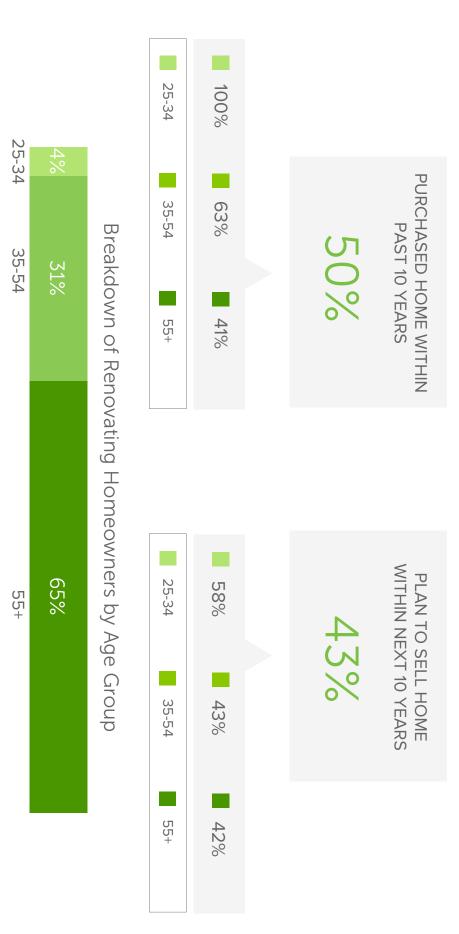
About Bathroom Renovating Homeowners

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Boomers Spend to Stay

and are more likely to think of their homes as a short- to medium-term residence. them have lived in their homes for over 10 years (69%) and have no plans to sell in the next 10 years (58%). In contrast, Millennial homeowners (ages 25 to 34) only comprise 4% of master bathroom renovators. They are new to their homes Two in three homeowners (65%) who are renovating their master bathroom are 55 and older ("Baby Boomers"). Most of

CHARACTERISTICS OF HOMEOWNERS RENOVATING THEIR MASTER BATHROOM – OVERALL AND BY AGE GROUP



^{*}Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation during 2016-17



Netiquette in the Bathroom?

23%, respectively). 34) are more than twice as likely as Baby Boomers (ages 55 or older) to browse social media in their bathroom (54% vs. Mobile device usage in the bathroom increased by 10% compared with 2016 findings. Millennial homeowners (ages 25 to

WEEKLY ACTIVITIES ON A MOBILE DEVICE IN BATHROOMS AT HOME - OVERALL AND BY AGE GROUP



^{*}Reflect percentage point difference between 2017 and 2016 study findings; shows only statistically significant differences at 90% confidence levels (see 2016 study). **Percentages reflect proportion of homeowners who completed, were working on, or were planning a master bathroom renovation during 2015-16 (see 2016 study). *Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation during 2016-17.



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Budget and Spend

\$21K Masters

larger master bathrooms as do Millennial homeowners (ages 25 to 34), that is \$22,800 vs. \$12,500, respectively. remodel of a smaller bathroom averages \$12,300. Baby Boomers (ages 55 or older) spend nearly twice as much on The average spend on a major remodel of a master bathroom exceeding 100 square feet is \$21,000*, while a major

AVERAGE SPEND ON A COMPLETED MASTER BATHROOM REMODEL (PRO+DIY) – OVERALL AND BY AGE GROUP



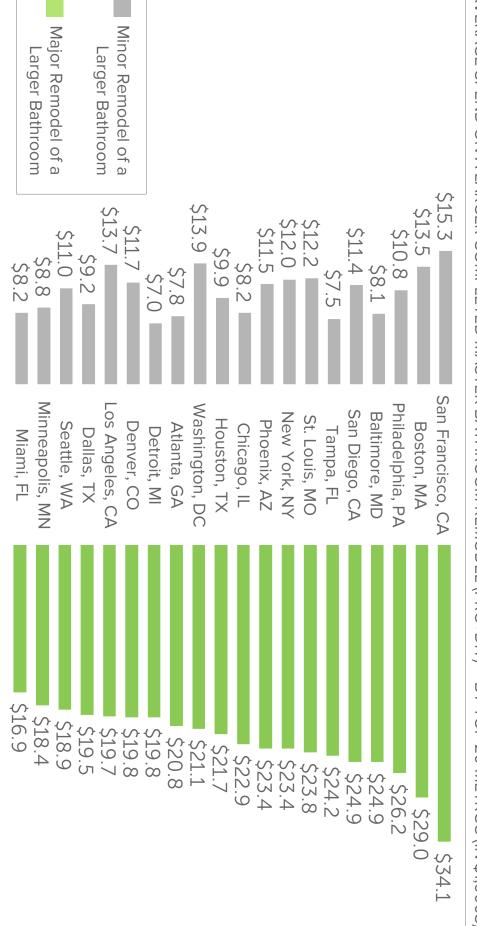
master bathroom remodel refers to a remodel in which at least the cabinetry/vanity, countertops, and toilet are replaced; minor master bathroom remodel includes all other remodels. *Average spend on master bathroom remodels combines data from this study with data on spend reported in the Houzz & Home Study for 2015 and 2016. Major



San Francisco Has Highest Remodel Costs

a larger bathroom is the lowest in the Miami metropolitan area (\$16,900). a major remodel and \$15,300 for a minor remodel of a master bathroom exceeding 100 square feet. The Boston metropolitan area is a distant second. Among the top 20 U.S. metro areas, the average spend on a major remodel of The San Francisco metropolitan area commands the highest master bathroom remodel spend, averaging \$34,100 for

AVERAGE SPEND ON A LARGER COMPLETED MASTER BATHROOM REMODEL (PRO+DIY) – BY TOP 20 METROS (IN \$1,000S)*



*See Page 9 footnote for sources and remodel and size definitions; top 20 metros exclude Riverside and include Baltimore instead due to sample size limitations.

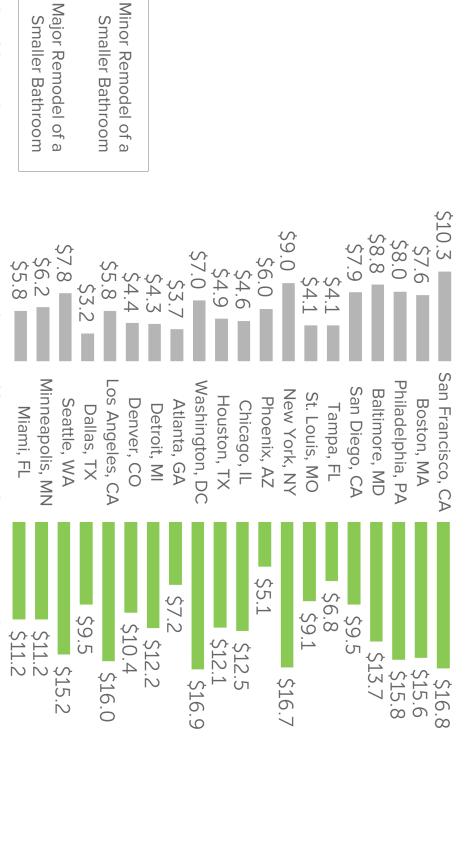


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Coastal Cities Command Greater Spend

remodel, with other major West Coast cities not far behind. Master bathroom renovation costs also vary widely by region for smaller master bathrooms, those of 100 square feet or less. Homeowners in San Francisco, Washington, D.C., and New York spend nearly \$17,000, on average, for a major

AVERAGE SPEND ON A SMALLER COMPLETED MASTER BATHROOM REMODEL (PRO+DIY) – BY TOP 20 METROS (IN \$1,000S)



^{*}See Page 9 footnote for sources and remodel and size definitions; top 20 metros exclude Riverside and include Baltimore instead due to sample size limitations.

11

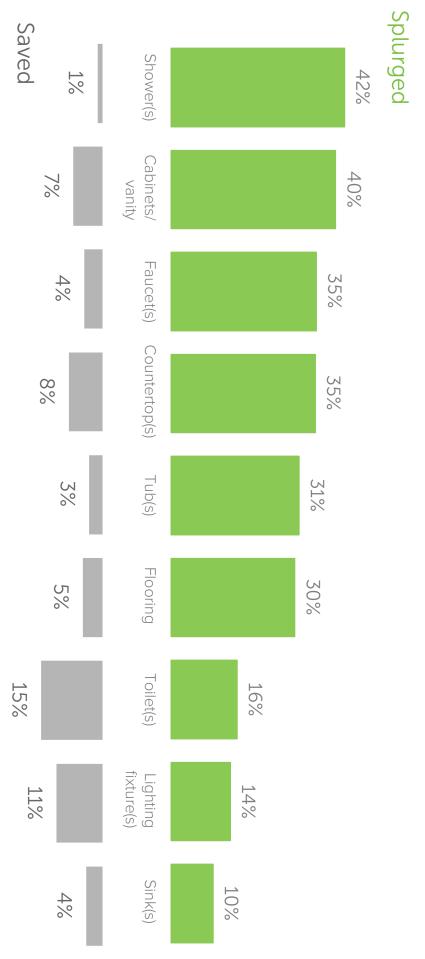


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Splurge or Save

other bathroom features. respectively), whereas more homeowners tend to save on toilets and lighting fixtures (15% and 11%, respectively) than any Showers and cabinets or vanities are the most common splurges during master bathroom renovations (42% and 40%

TOP NEW MASTER BATHROOM FEATURES THAT HOMEOWNERS SPLURGE OR SAVE ON DURING RENOVATION*



renovation during 2016-17. *Percentages reflect proportion of homeowners who chose to splurge or save on a feature among those installing the feature as part of a completed master bathroom



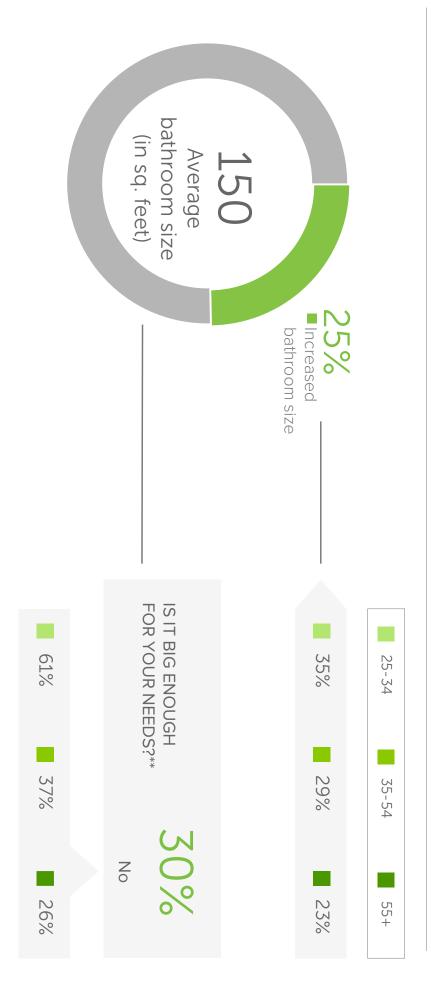


Scope and Pro Hiring

A Yearning for Space

with the bathroom size when it is left unchanged (ages 25 to 34) are most likely to increase the size of their master bath and are significantly more likely to be unsatisfied three-quarters who do not change the bathroom's size, 30% consider it too small for their needs. Millennial homeowners Consistent with 2016 findings, one in four renovating homeowners increases the size of the master bathroom. Of the

CHANGE IN ROOM SIZE DURING MASTER BATHROOM RENOVATION - OVERALL AND BY AGE GROUP



^{*}Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation during 2016-17

^{**}Percentages reflect proportion of homeowners who are not increasing room size as part of their completed, current, or planned 2016-17 master bathroom renovation.

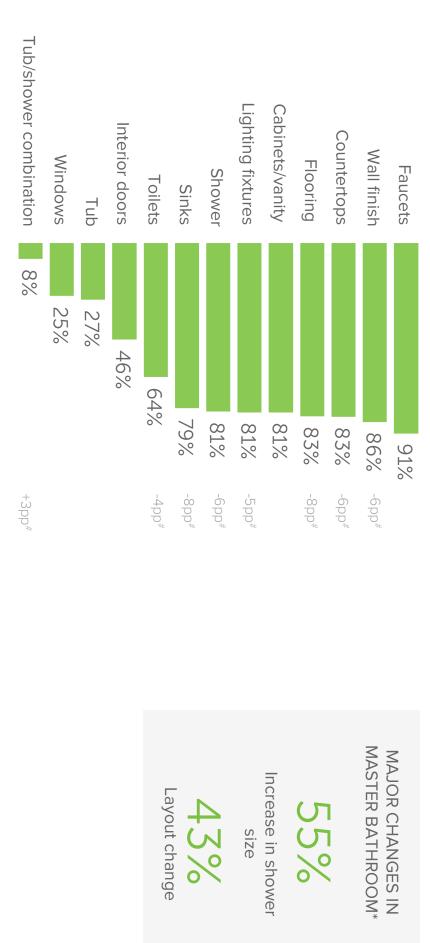


14

Fewer Gut Renovations

bathrooms and 55% are increasing the size of their showers. upgrades (79% vs. 87%, respectively). That said, 43% of renovating homeowners are changing the layout of their master Renovating homeowners are somewhat less inclined to remove all or the majority of master bathroom features this year relative to the 2016 study, with the greatest declines in frequency of flooring upgrades (83% vs. 91%, respectively) and sink

UPGRADED MAJOR FEATURES IN MASTER BATHROOM RENOVATIONS



^{*}Reflect percentage point difference between 2017 and 2016 study findings; shows only statistically significant differences at 90% confidence levels (see 2016 study). Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation during 2016-17"



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15

Having a Project Manager Is Key

themselves but bring in specialty service providers to handle installations (16%). manage master bathroom upgrades (52% and 19%, respectively). A small share of other homeowners manage the remodel homeowners are doing so. Seven in ten renovating homeowners bring in a general contractor or a bathroom remodeler to Hiring a pro is seen as extremely important for a master bathroom renovation, as reflected by the fact that 86% of

PRO HIRING 25-34 77% OVERALL PRO HIRING 35-54 81% 55+ 88% TOP PRO CATEGORIES BEING HIRED* Interior designer or decorator Bathroom remodeler HIRED SPECIALTY SERVICE PROVIDERS Bathroom designer General contractor (WITHOUT A PROJECT MANAGER)** Lighting designer 2% Architect 16% 8% 11% 13% 19%

^{**}Specialty service providers refer to electrician, plumber, tile specialist, cabinet makers, and other trades.; project managers refers to general contractors and remodelers.



^{*}Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation during 2016-17



Look and Feel

Young and Modern

54), while Millennial homeowners (ages 25 to 34) most often opt for modern styles. consistent with last year. Contemporary is most popular with Baby Boomers (ages 55 or older) and Gen-Xers (ages 35 to transitional, or modern describe over half of today's renovated master bathrooms (25%, 17%, and 15%, respectively) Nine in 10 renovating homeowners change the style of their master bathroom during an upgrade. Contemporary,



[#]Reflect percentage point difference between 2017 and 2016 study findings; shows only statistically significant differences at 90% confidence levels (see 2016 study) **Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation during 2016-17 *Percentages reflect proportion of homeowners who are changing the style as part of their completed, current, or planned 2016-17 master bathroom renovation

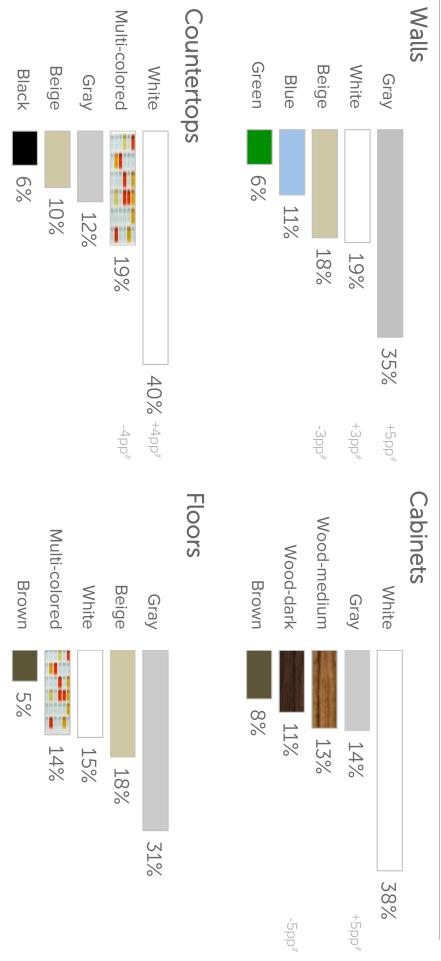


18

Against the Gray Backdrop

compared with 2016 against gray walls and floors. Notably, dark wood cabinetry and multicolored countertops are less common in 2017 white this year (40% and 38%, respectively) compared with 2016 findings. These features are increasingly contrasted White continues to gain popularity in renovated master bathrooms, with even more countertops and cabinets appearing in

TOP DOMINANT COLORS IN MASTER BATHROOM RENOVATIONS:



[#]Reflect percentage point difference between 2017 and 2016 study findings; shows only statistically significant differences at 90% confidence levels (see 2016 study). *Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation during 2016-17.



White and Gray Keep Millennials Cool

appear in renovated master bathrooms of Millennial homeowners (ages 25 to 34) than in those of Baby Boomers (ages 55 or by Gen-Xers (ages 35 to 54). older). Cabinetry in medium wood tones is most likely to appear in Baby Boomer masters, while dark wood tones are preferred Similar to the findings for kitchens, white countertops and cabinets and gray flooring and walls are significantly more likely to

COLOR SELECTION IN MASTER BATHROOM RENOVATIONS - BY AGE GROUP*



^{*}Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation during 2016-17



20



Products and Finishes

Rub-a-Dub-Dub, Soaking in the Tub

although fiberglass and cast-iron tubs are a significant alternative (16% each). for a soaking tub (64%), and many choose a freestanding flat-bottom tub (43%). Acrylic is still the dominant tub material, Nearly two in five homeowners opt to upgrade a bathtub during a master bathroom renovation. Among them, two-thirds go



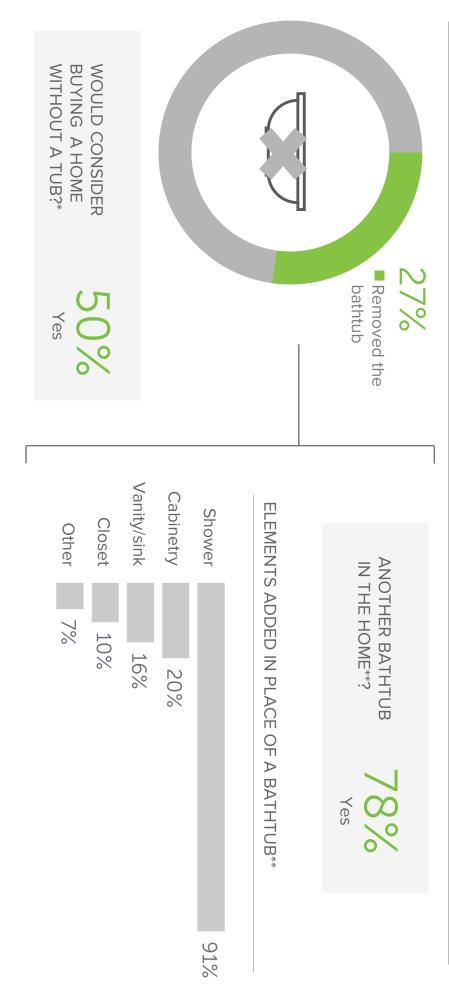
^{**}Percentages reflect proportion of homeowners who updated their bathtub as part of their completed, current, or planned 2016-17 master bathroom renovation. *Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation in 2016-17.



Tub? What Tub?

renovating homeowners would consider buying a home without a bathtub. are far from becoming obsolete, since the majority of those removing a tub have another one in the home (78%). Still, half of One in four homeowners removes the master bathtub (27%), primarily to make room for a larger shower (91%). But bathtubs

REMOVING A BATHTUB IN MASTER BATHROOM RENOVATION*



^{*}Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation in 2016-17.

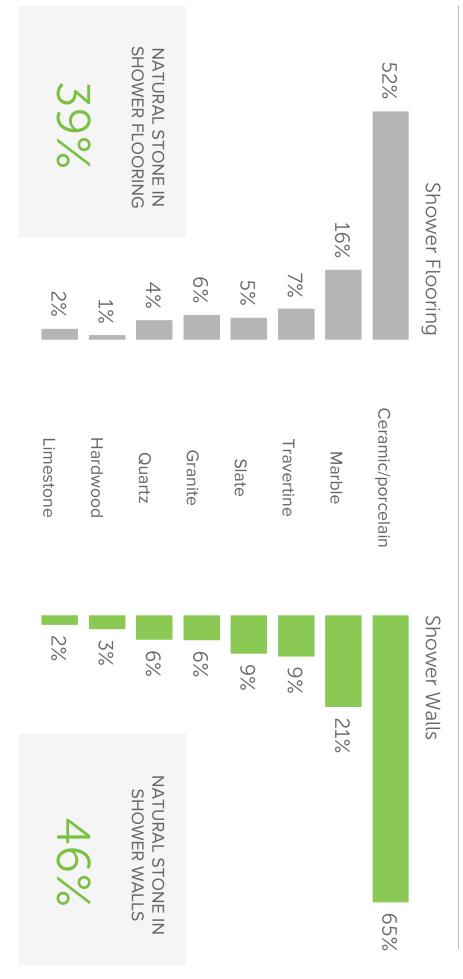
^{**}Percentages reflect proportion of homeowners who removed their bathtub as part of their completed, current, or planned 2016-17 master bathroom renovation.



Shower Surfaces of Tile and Stone

surface materials chosen. Marble is a universally preferred choice for natural stone, especially for Gen-Xers (ages 35 to while slate is preferred by Millennial homeowners (ages 25 to 34). (See Appendix B for breakdown by age). 54). Other materials also see generational biases with travertine more popular among Baby Boomers (ages 55 or older). Among the 81% of renovating homeowners tackling showers, ceramic/porcelain tile or natural stone tile/slabs are the top

NEW FLOORING AND WALL FINISHES IN UPDATED MASTER SHOWERS



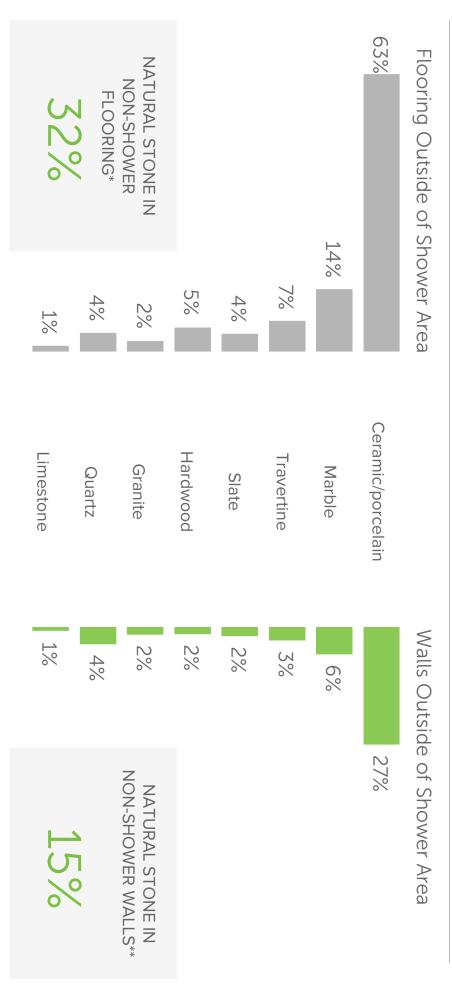
^{*}Percentages reflect proportion of homeowners who are updating showers as part of their completed, current, or planned 2016-17 master bathroom renovation.



Seeking Continuity

outside of the shower area. look of the shower with the rest of the bathroom surfaces. These higher-end finishes are less likely to appear on walls More than eight in 10 renovating homeowners replace flooring and wall finishes outside of the shower area (83% and 86%, respectively). They continue to rely on ceramic/porcelain tile and natural stone tile or slab for flooring, likely integrating the

NEW FLOORING AND WALL FINISHES IN UPDATED NON-SHOWER AREAS OF MASTER BATHROOMS



^{**}Percentages reflect proportion of homeowners who are updating their wall finish as part of their completed, current, or planned 2016-17 master bathroom renovation. *Percentages reflect proportion of homeowners who are updating their flooring as part of their completed, current, or planned 2016-17 master bathroom renovation.

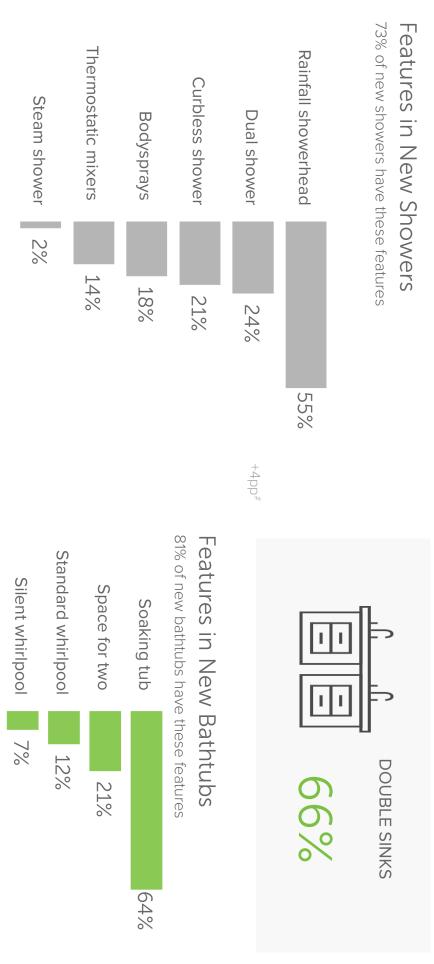


25

A Touch of Shower Luxury

accommodate two people at a time increased year over year (24% vs. 20% in the 2016 study). shower features (73%) such as rainfall shower heads and/or body sprays. Moreover, installation of showers that Among the 81% of renovating homeowners who are upgrading their master shower, three in four opt for higher-end

HIGHER-END FEATURES IN UPDATED MASTER BATHROOM SHOWERS, BATHTUBS AND SINKS



bathroom renovation. *Percentages reflect proportion of homeowners who are updating their showers, bathtubs and/or sinks as part of their completed, current, or planned 2016-17 master

^{*}Reflect percentage point difference between 2017 and 2016 study findings; shows only statistically significant differences at 90% confidence levels (see 2016 study).

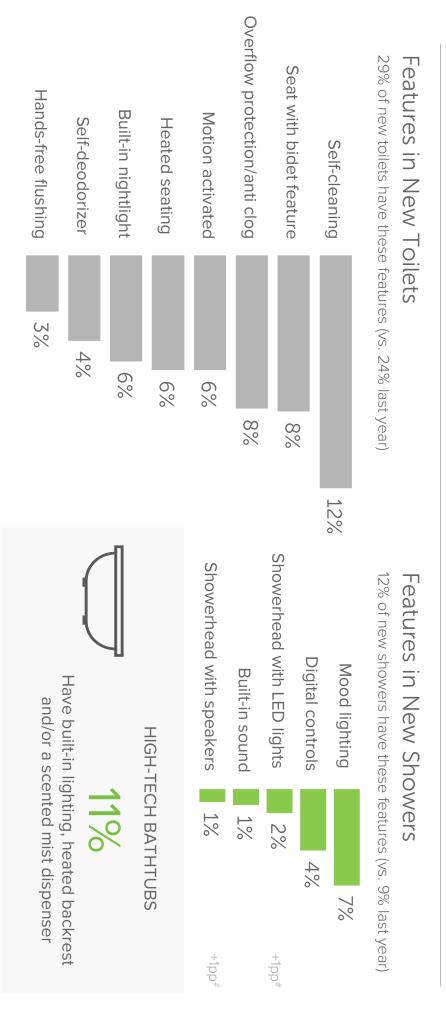


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Flush with Tech

eleven in 2016 (9%). 24% from last year's study. Similarly, one in eight new showers (12%) include high-tech elements compared to only one in in four upgraded toilets (29%) boast high-tech features such as self-cleaning or overflow protection, compared with only The demand for high-tech features in toilets and showers grew 19% and 26%, respectively, year over year. More than one

HIGH-TECH FEATURES IN UPDATED MASTER BATHROOM SHOWERS, TOILETS, AND BATHTUBS



[#]Reflect percentage point difference between 2017 and 2016 study findings; shows only statistically significant differences at 90% confidence levels (see 2016 study) *Percentages reflect proportion of homeowners who are updating showers, toilets or bathtubs as part of their completed, current, or planned 2016-17 master bathroom renovation



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Prioritizing Accessibility

flooring, or seats in their new bathtub (40%), twice as high as younger households (22%). design features in mind. For example, two in five renovating Baby Boomers (ages 55 or older) add grab bars, nonskid Renovating homeowners who are 55 and older are more likely to update their showers, bathtubs, and toilets with universal-

ACCESSIBILITY FEATURES IN UPDATED MASTER BATHROOM SHOWERS, TOILETS, AND BATHTUBS IN 55+ HOMES^{*}



[#]Reflect percentage point difference between 2017 and 2016 study findings; shows only statistically significant differences at 90% confidence levels (see 2016 study) *Percentages reflect proportion of 55+ homeowners who are updating showers, toilets, or bathtub as part of their completed, current, or planned 2016-17 master bathroom renovation



Bathroom Bestsellers

The top five bathroom categories for the Houzz Shop in 2017 are below, including a bestseller for each.



Bathroom Accessories



Bathroom Vanities and Sink Consoles



Toilets



Towel Bars and Hooks



• Links to the product, clockwise from left: Maruku Shower Bench, Gela Double Vanity, Concrete Toilet Paper, Sliding Rails Towel Rack, Woodbridge Dual-Flush Toilet with Soft-Closing Seat





Methodology

Methodology

APPROACH

bathroom renovation projects, fielded between June 6 and August 7, 2017. needs. With these goals in mind, Houzz conducted an online quantitative survey of registered Houzz users regarding in the choices they make for their homes, and to give home professionals greater insights into their clients' wants and improvement activity. We aggregate and share these insights with the community to give people greater confidence engaged user community is able to provide unprecedented insights on the latest market trends based on users home Houzz is an all-in-one resource for homeowners working on a home renovation or decorating project. Our large and

COMPLETES AND QUALIFICATIONS

projects, 50, 355, and 749 respondents fell in the 25-34, 34-54, and 55+ age groups project, and 191 with a partial bathroom project. Additionally, in the instances of by-age reporting for master bathroom final sample consists of 1,238 respondents with a master bathroom project, 808 with a full non-master bathroom project in the past 12 months, to be currently working on one, or planning to start one in the next three months. The and homeowners. Additionally, respondents were required to have completed a bathroom remodel or addition The 56 - question survey gathered information from a total of 2,287 users, who reported to be 25 years old or older

SAMPLING AND WEIGHTING

final data were reviewed to ensure representativeness of the Houzz user populations would be shared with the larger Houzz community to help others in completing their own bathroom renovations. The not meet the qualification criteria above were then eliminated. Respondents were notified that aggregate findings Data was gathered via a link in the Houzz newsletter sent out by email twice a week to registered Houzz users. The link invited homeowners to share their bathroom project details, and then subsequently terminated people who do





Appendices

A. At a Glance: Renovation of Full Non-Master Bathrooms

Full Non-Master Bathroom Features

Top Bathroom Styles After Renovations (among those changing style)	Colors (among renovating homeowners)	Wall & Flooring Materials (among homeowners updating showers, wall finishes or flooring)	Shower & Toilet Types (among renovating homeowners upgrading shower or toilet)	Scope Details (among renovating homeowners)	Pro Hiring (among renovating homeowners)	Average Remodel Spend (on a major remodel of a larger bathroom (51+ sq. ft.))
#1 Bathroom Style: Contemporary 22%	#1 Color in Walls: Gray 32%	#1 Shower Wall Finish: Ceramic or porcelain tile 66%	#1 Shower Type: Alcove 71%	Increase Bathroom Size	Overall Hiring 79%	Overall \$10,400
#2 Bathroom Style: Modern 16%	#1 Color in Floors: Gray 25%	#1 Shower Flooring: Ceramic or porcelain tile 47%	#2 Shower Type: Corner 13%	Increase Shower Size 42%	#1 Pro Type Hired: General contractor 42%	Age Group: 25-34 \$5,900
#3 Bathroom Style: Traditional 11%	#1 Color in Countertops: White 44%	#1 Non-Shower Wall Finish: #1 Non-Shower Flooring: Ceramic or porcelain tile Ceramic or porcelain tile 60%	#1 Toilet Type: Comfort-height 63%	Change Layout 23%	#2 Pro Type Hired: Building specialist 37%	Age Group: 35-54 \$9,800
#4 Bathroom Style: Transitional 11%	#1 Color in Cabinets: White 40%	:#1 Non-Shower Flooring: Ceramic or porcelain tile 60%	#2 Toilet Type: High-efficiency 56%	Change Style 76%	#3 Pro Type Hired: Bathroom remodeler 12%	Age Group: 55+ \$11,700



B. Breakdown of Shower Finishes by Age Group



^{*}Percentages reflect proportion of homeowners who are updating showers as part of their completed, current, or planned master bathroom renovation during 2016-17.



C. Breakdown of Non-Shower Finishes by Age Group



renovation during 2016-17. *Percentages reflect proportion of homeowners who are updating non-shower wall or flooring finishes as part of their completed, current, or planned master bathroom



D. Links to Resources on Houzz

turn their ideas into reality. Houzz is the easiest way for people to find inspiration, get advice, buy products, and hire the professionals they need to help

	Cabinet & Drawer Hardware		
	Bathroom Fixture Parts		
	Urinals		
	Bidets		
	Toilets		
	Bath Linens		
Bathroom Tile	Bathroom Cabinets and Shelves		
Bathroom Vanities	Medicine Cabinets		
Bathroom Storage	Bathroom Accessories	Kitchen & Bath Remodelers	Transitional Bath
Bathroom Sinks	Bathroom Sinks	Kitchen & Bath Designers	Modern Bath
Showers	Bathroom Faucets	Interior Designers and Decorators	Contemporary Bath
Bathtubs	Bathtubs	Home Builders	Master Bath
Half Baths	Showers	General Contractors	Kids' Bath
Bathroom Color	Tile	Design-Build Firms	3/4 Bath
Bathroom Makeovers	Bathroom Vanity Lighting	Cabinets and Cabinetry	Powder Room
Bathroom Workbook	Bathroom Vanities	Architects & Building Designers	Bathroom
ARTICLES	BROWSE PRODUCTS	FIND PROS	PHOTOS

