

**US Paints Summer 2014 SURVEY**

Survey completed August 27<sup>th</sup>, 2014. We spoke with various store managers across the US about their observed paint buying trends, particularly among contractors and DIY customers.

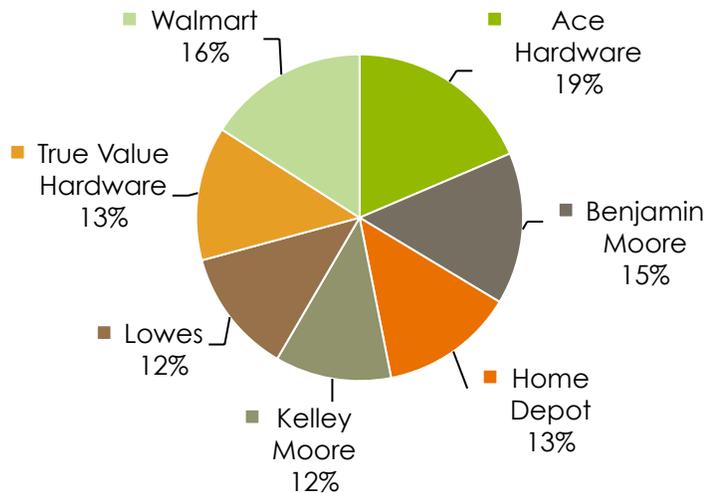
 SURVEY DISTRIBUTION
 

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**No. of responses**

There were a total of 113 responses completed across the country.

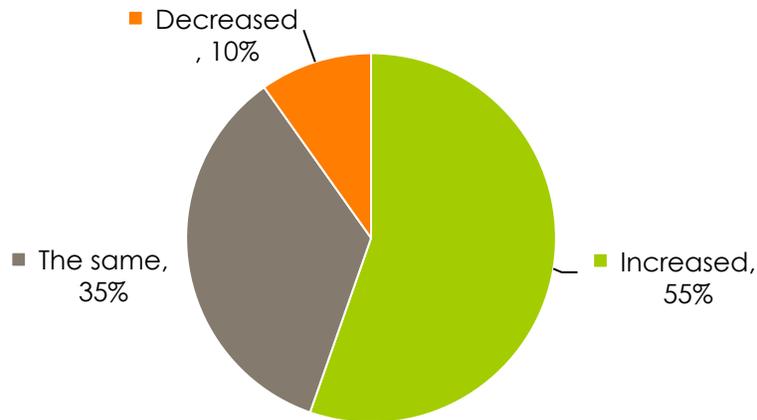
Region	Count	Percentage
Midwest	29	31%
Northeast	25	15%
South	31	37%
West	28	17%
<b>Total</b>	<b>113</b>	<b>100%</b>



Distribution	Midwest	Northeast	South	West	Nationwide
Ace Hardware	5	5	7	4	21
Benjamin Moore	6	4	4	3	17
Home Depot	4	4	3	4	15
Kelley Moore	-	-	6	7	13
Lowes	4	3	4	3	14
True Value Hardware	5	4	3	3	15
Walmart	5	5	4	4	18
<b>All Stores</b>	<b>29</b>	<b>25</b>	<b>31</b>	<b>28</b>	<b>113</b>

## QUESTION 1

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**On average how is Summer paint volume compared to Summer last year?**


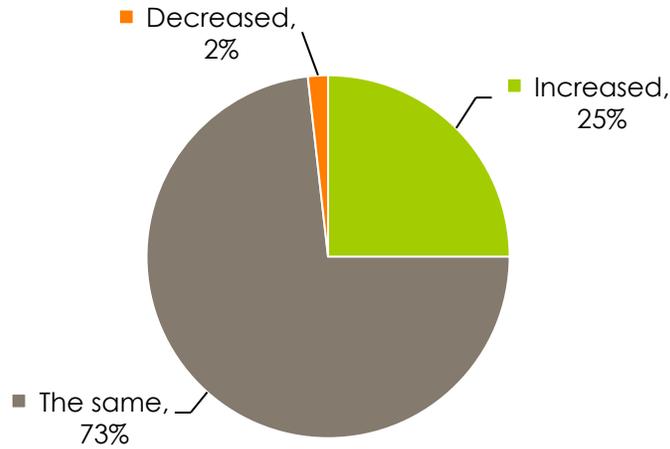
	Count	Percentage
<b>Increased</b>	62	55%
<b>The same</b>	39	35%
<b>Decreased</b>	11	10%
<b>Total</b>	<b>112</b>	<b>100%</b>

**Additional comment(s):**

- because of the newline we got the new paint mixer, increased 80% (Ace Hardware, FL)
- Almost 100%. That has to do with the do-it-yourself customers. (Ace Hardware, CO)
- About the same. The decrease of the do-it-yourselfers has balanced the contractors. (Benjamin Moore, ME)
- Last year was one of the exceptional year because of Sandy storm and hence comparing from 2013 the volume is Less by 40% otherwise we are better than the previous years i.e, 2011 & 2012 (Home Depot, NJ)

## QUESTION 2

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**On average how are current paint prices compared to last year?**


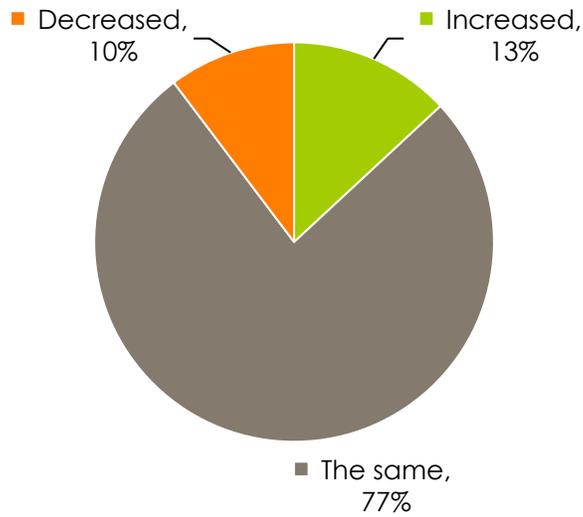
	Count	Percentage
<b>Increased</b>	28	25%
<b>The same</b>	82	73%
<b>Decreased</b>	2	2%
<b>Total</b>	<b>112</b>	<b>100%</b>

**Additional comment(s):**

- On an average its almost same because adding new product which has increased prices but the old one are maintaining the prices or we see a decrease (Home Depot, HI)
- We have included two more lines of more expensive paints so on a bigger picture its gone up a little bit maybe by 5% (Ace Hardware, MA)

QUESTION 3

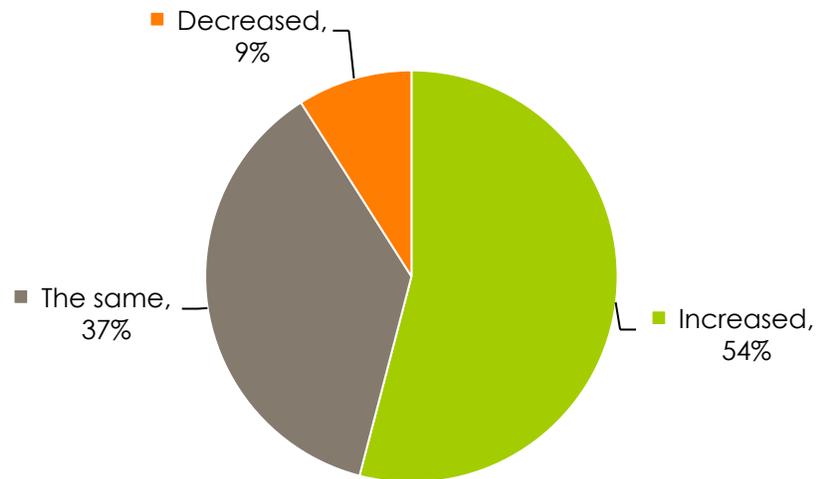
**How would you compare discounting this summer compared to last year?**



	Count	Percentage
<b>Increased</b>	14	13%
<b>The same</b>	82	77%
<b>Decreased</b>	11	10%
<b>Total</b>	<b>107</b>	<b>100%</b>

## QUESTION 4

**How is paint buying for do-it-yourself projects this Summer compared to last year??**



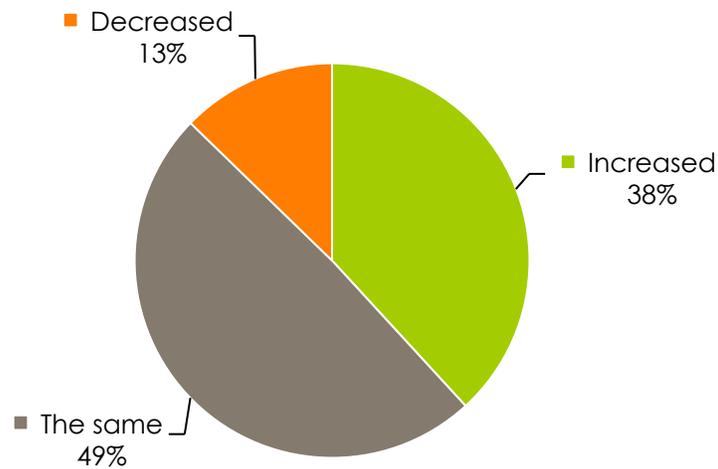
	Count	Percentage
<b>Increased</b>	60	54%
<b>The same</b>	41	37%
<b>Decreased</b>	10	9%
<b>Total</b>	<b>111</b>	<b>100%</b>

**Additional comments:**

- If we take out the effect of Sandy there has been an Increase every year in do-it-yourself projects as people wanting to paint by themselves (Home Depot, NJ)
- I think that the overall demand for do-it-yourself have probably gone up by 15-20% as compared to last year and I think its something that continues to go up just because people are wanted to do it themselves because its cheaper that way than getting a contractor. So I think that's a trend gone up and will continue to go up. (Home Depot, MO)
- Same level but since we are educating more people about do-it-yourself project so there is an increase in higher end product selling. (Kelley Moore, ID)
- Up 10%. People are feeling better about the economy, so they're doing some projects that they've been putting off. (Kelley Moore, NV)

## QUESTION 5

**How is paint buying by professional painters or contractors this summer, compared to last?**



	Count	Percentage
<b>Increased</b>	42	38%
<b>The same</b>	54	49%
<b>Decreased</b>	14	13%
<b>Total</b>	<b>110</b>	<b>100%</b>

**Additional comments:**

- Down by 10% because there is another location out the street that also sells. (Ace Hardware, MA)
- Decrease by 20%. Mostly because no houses are being built here. (Ace Hardware, UT)
- I think the contractors are not yet recovered from the Recession if we again take out the Sandy disaster and there is no change otherwise. (Home Depot, NJ)
- Same. We do not even have too many contractors. The contractors actually prefer Benjamin Moore. (Kelley Moore, OR)
- Up 5%. They're getting a little better quality. They're also getting a little better service from Lowes. (Lowes, ME)
- We don't have professionals buying from us. We don't have paint mixer (True Value Hardware, Mexico)