

World Floor Covering Association Consumer Research Study

MINDWAVE
RESEARCH

October 2006

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In general, qualitative research is **exploratory and anecdotal in nature**. Its purpose is to provide directional insight from a small sample of the target audience. The results are not representative of the target population as a whole.

- The primary objective of this research is to explore the attitudes and perceptions of consumers with respect to specialty flooring retailers and big box stores, and better understand how consumers shop for floor coverings
- Further objectives include exploring:
 - End-user opinions concerning the perceived value of retailer certification and specialized training of store associates, contractors and/or installers;
 - The 'do-it-yourself' approach (mentality) with regard to floor covering purchases, product information, seeking/education through to the final installation process;
 - The frequency and degree that consumers use the Internet to gather information about types of flooring, brands, pricing, 'where to buy' and design tips/ideas;
 - Reaction to the new/enhanced WFCAs educational website - updated since the first round of focus group research

- Mindwave conducted four focus groups, two each in Milwaukee and Chicago, with a total of 39 respondents
- The first focus group in each city was comprised of respondents who made their most recent flooring purchase in a big box store
- The second focus group in each city was comprised of respondents who made their most recent flooring purchase at a specialty flooring retailer

City	Date	Customer Type	Respondents
Milwaukee	October 18, 2006	Big Box	10
		Specialty	10
Chicago	October 19, 2006	Big Box	9
		Specialty	10

- Respondents are homeowners over the age of 25
 - Most employed full-time; some retirees, homemakers and people in part-time employment
- Respondents have replaced or remodeled the flooring in at least one room of their house within the last 6 months
- Respondent was sole or equal decision-maker in this flooring purchase
- Respondents purchased the flooring at either a big-box home improvement store or at a specialty home improvement store

- Most flooring shoppers tend to visit up to five different stores before making a purchase
 - Generally, two or three big box stores and/or a couple of specialty stores
- The perceived advantages of shopping at a big box store include:
 - Lower prices, financing, less sales pressure, availability of stock, convenient locations and one-stop shopping
- The perceived advantages of specialty stores include:
 - Better service and workmanship, specialist knowledge, high quality materials, extensive selection, demo installations and on-site consultation
- Specialty shoppers were more likely to arrange installation by the retailers
 - Motivated by ease, timing (i.e. to get it done quickly), and the lack of appropriate skills and tools
- In contrast, about half of the big box shoppers handled the installation themselves
 - Usually, to save money

- **What big box shoppers liked most about their shopping experience:**
 - Speed and convenience (the product was in stock and they could get everything at one location), good prices and a lack of sales pressure
- **They liked least:**
 - The difficulty of getting help from knowledgeable staff, long check-out lines and loading and transporting the materials
- **What specialty shoppers liked most about their shopping experience:**
 - Good service from knowledgeable staff, the selection of flooring materials and the finished product
 - Some also felt that they managed to get a good price
- **They liked least:**
 - Pushy salespeople and inconvenient locations

- Among big box shoppers, the eventual choice of store was motivated by a number of factors:
 - Primarily that the store had the lowest price
 - Other important factors were trust in the store, the fact that the flooring was in stock, that they'd had prior positive experiences and the store had a wide selection
- Specialty shoppers were more likely to be motivated by their trust in the store and/or the salesperson's advice
 - Other factors were comparatively less important

- Shoppers did not notice if their store was industry certified
 - Nobody knew that flooring industry certification exists
- Generally, certification is not important in choosing a store
 - Shoppers tend to base their opinion on speaking to the salesperson
 - They wouldn't know what standards (if any) the certification would guarantee
- Shoppers might assume that any certification involved training and standards
 - However, others would regard it as meaningless
- Better Business Bureau membership was considered more credible

- About half of the shoppers used the Internet to research their most recent flooring purchase
- They tend to start with a keyword search on Google
 - Those who went directly to a site tended to go to homedepot.com
- As part of the research, some visited educational sites
 - Particularly DIY sites and Consumer Reports
- The Internet was used to find a variety of product information (inc. pricing), installation information and care instructions
- However, Internet information is not considered any more credible than other sources
 - In particular, shoppers actively want to hear the experiences of others
- Few know what a podcast is
 - Once it was explained, some thought they might listen to a flooring information podcast

- Overall, reactions to the website were very positive
- Respondents particularly liked the large quantity of useful information it offered
 - Other 'likes' included the fact the website covers all kinds of different flooring, the Virtual Room Designer, the ease of use and the fact that the site was well organized
- There were fewer strong dislikes, but some 'dislikes' included the \$100 draw, that all the photos were of upscale houses, and that respondents felt they needed more information about the WFCA
- A particular problem was knowing how to find the website
 - Since awareness of the WFCA is so low, respondents were unable to see how they would have found the site had they not been shown it

- The Virtual Room Designer was a very positively received feature
 - However, respondents would like to be able to manipulate pictures of their own rooms or at least specify its dimensions
- The Dealer Locator was considered useful
 - However, the accompanying code of conduct was considered too vague by some; they wanted to know concrete benefits (if any) it held for the consumer, particularly in the event of a complaint

Detailed Findings: Recent Flooring Purchase

- In general, those shopping for flooring tended to visit 2 or 3 different big box stores
 - Home Depot, Lowe's and Menard's are usually the stores visited
 - "I went to Home Depot, Lowe's, Menard's and then I bought from Home Depot." (Chicago, group 1)*
- Those who made their final purchase at a big box store sometimes didn't visit any specialty stores
 - However, others visited one or two
 - "I did Menard's and Home Depot and then I did Olson Rug and Century Tile." (Chicago, Group 1)*
- Those who made their eventual purchase at a specialty store tended to visit two or three specialty stores
 - However, a number visited only one specialty store - the one at which they made their final purchase

- **Those who purchased at a big box store give the following reasons:**
 - **Better price**

"Quite simply, price. That's the bottom line, no discussion about it." (Chicago, Group 1)
 - **Financing**

"Primary reason is because of the financing. I had six months, I could do a certain dollar amount for six months." (Milwaukee, Group 1)
 - **Less sales pressure**

"Sales pressure at the specialty stores was intense." (Chicago, Group 1)
 - **Availability**

"I checked out the other stores and Lowe's had it in stock, so that made a big difference." (Chicago, Group 1)
 - **Convenient locations**

"I just went to Home Depot because it's close." (Milwaukee, group 1)
 - **One-stop shop**

"I was looking for a lot of different things. So instead of spending all day driving to a hundred different places, my idea was to go to one where they had everything." (Chicago, Group 1)

- **Those who purchased at a specialty store give the following reasons:**
 - **Better service**

"I go to Home Depot for things that I know I can handle on my own, but getting help there is just not fun [...] So naturally, I went to a specialty store." (Chicago, Group 2)
 - **Better workmanship in installation**

"The specialty store basically came in, stripped everything out, pulled out all the sub-floors and everything like that. At Home Depot they don't take out the sub-floor, they don't take out the linoleum. They slap it up on top." (Milwaukee, Group 2)
 - **More specialist knowledge**

"I find the specialty stores really know their stuff much better." (Chicago, Group 2)
 - **Higher quality materials**

"Specialty stores seem to have more high-end materials, which is a plus." (Chicago, Group 2)
 - **More extensive selection**

"For us, it was more about selection. We just weren't finding the selection in a lot of big box stores." (Milwaukee, Group 2)
 - **Demo installations**

"They had a lot of little demo areas around the perimeter where you could actually see what your bathroom might look like." (Milwaukee, Group 2)
 - **On-site consultation**

"They were willing to come out and take a look, give recommendations." (Milwaukee, Group 2)
 - **They're more 'local'**

"Well, the people who run the joint live in the neighborhood, and so do I." (Chicago, Group 2)

Big Box Shoppers	Specialty Shoppers
<ul style="list-style-type: none"> ● Availability / product in stock <i>"Everything I needed was there." (Chicago, Group 1)</i> ● One-stop shopping / no driving around <i>"I liked that everything was under one roof because I had multiple items to buy, hardwood and tile." (Chicago, Group 1)</i> ● No sales pressure <i>"Able to make my own decision without any sales pressure." (Chicago, Group 1)</i> ● Price ● Consistency ● Turn around times <i>"The floor came quickly and I got to pick it up really fast." (Milwaukee, Group 1)</i> ● Service <i>"I had a good customer service experience [...] I thought they were very helpful." (Chicago, Group 1)</i> 	<ul style="list-style-type: none"> ● Knowledge of staff <i>"Nice, knowledgeable staff." (Chicago, Group 2)</i> ● Selection and variety <i>"They had a large number of different manufacturers to choose flooring from and lots of samples." (Milwaukee, Group 2)</i> ● Displays <i>"The thing I liked most was their display areas." (Milwaukee, Group 2)</i> ● Price (esp. discounts) ● Service (esp. consultations) <i>"He spent 45 minutes with us putting patches down, just stain on the floor, and trying different combinations. And never once did we feel like he was impatient." (Milwaukee Group 2)</i> ● The finished product <i>"The finished product, the floors are beautiful." (Milwaukee, Group 2)</i>

Big Box Shoppers	Specialty Shoppers
<ul style="list-style-type: none"> ● Loading, transporting & unloading <i>"That was about half an hour just trying to get somebody to help us take it off the cart and get it on the truck." (Chicago, Group 1)</i> ● Checkout lines <i>"Checkout. You got your carts fully loaded. The aisle's 20 people deep." (Chicago, Group 1)</i> ● Getting help <i>"I wanted some help." (Milwaukee, Group 1)</i> ● Knowledge of Staff <i>"For me it was finding someone to help and then trusting that they had some expertise in that area. You know, I wish I knew how much they know beforehand." (Milwaukee, Group 1)</i> 	<ul style="list-style-type: none"> ● Pushy salespeople <i>"What I liked least was the know-it-all salesman who was obviously commission-motivated." (Chicago, Group 2)</i> ● Some found selection too small <i>"The least was maybe like a larger selection of the carpet we bought [...] we got red, but they only had one color red." (Milwaukee, Group 2)</i> ● Location / distance <i>"The distance from my house was the biggest problem. I had to go a long way to get to these people. 25 miles." (Milwaukee, Group 2)</i> ● Lighting in the showroom <i>"What I liked least was probably the lighting in the actual showroom, because every sample we thought we liked in the showroom when we got it home, in natural light it didn't look the same." (Milwaukee, Group 2)</i>

Importance of Store Attributes

	Big Box	Specialty
I trusted the store	7.8	8.8
Trusted salesperson's advice	4.9	7.1
Store had the lowest price	8.4	6.5
Widest selection	7.2	6.5
A guarantee on the work	3.3	5.9
Floor I wanted was in stock	7.7	5.4
Prior positive experience	7.3	4.3
Quickest installation time	1.7	3.4
Store covered multiple projects	4.5	2.2
Industry certification	2.4	2.2
Store offered financing	3.9	1.9

- Chart shows relative importance of store attributes on a scale of 1-10 where 10 is most important
- Big box shoppers chose their store on the basis of price, trust of the store and the fact that their floor covering was in stock
- Specialty shoppers were more likely to be motivated by trust of the store or salesperson

- Just under half of the big box shoppers performed the installation themselves
- Far more of the specialty shoppers arranged installation through the retailer
- Those who did not perform the installation themselves were motivated by:
 - Ease
"I didn't want to deal with it. I want full-service. I want to come back the next day and I want it to be done." (Chicago, Group 2)
 - Timing
"We needed it done fast, and they did." (Chicago, Group 2)
 - Lack of skills or tools
"I would never attempt to do carpet. I shouldn't say females can't lay carpet, but I just don't have the equipment." (Chicago, Group 1)
- Those who did perform the installation themselves usually wanted to save money
 - However, a few also did it out of personal pride
"It's nice to put down a floor and do a good job." (Chicago, Group 2)

- In general, shoppers did not notice whether the store or salesperson was industry certified
 - Awareness of flooring industry certification was non-existent
"I didn't even know to look for something like that." (Chicago, Group 2)
 - Most tended to base their opinion of a salesperson's expertise on actually talking to them
"Talking to them, you get a feeling of they know what they're doing, but I'm not looking for a badge or anything that says I'm certified." (Milwaukee, Group 1)
- Despite this, they were able to name some other industry certifications
 - Other industry certifications known included, Certified Public Accountant, Automotive Service Excellence, Microsoft Certified Systems Engineer, National Association of the Remodeling Industry

Attitudes to Industry Certification

- **Most assume that flooring industry certification involves training & testing**

"Someone who has gone through some kind of schooling and training for that particular type of work." (Chicago, Group 1, written exercise)

 - **Some believe that this might guarantee at least a basic level of competency**

"Understands products and appropriate applications, knows trends, materials, manufacturers and probably attended a training of some sort." (Milwaukee, Group 2, written exercise)
 - **Some just think it's a piece of paper**

"A piece of paper given to the seller for being in the business for a few years and buying lots of flooring." (Chicago, Group 2, written exercise)
- **Overall, such certification would not be a big factor in the purchase decision**
 - **Wouldn't really know what standards it guarantees**

"The sticker wouldn't really mean much to me until I did the research and found out what retailer accreditation meant." (Milwaukee, group 2)
 - **Flooring isn't a matter of life or death**

"You never hear any story about this person tripped and died in their carpet because it was installed by a non-certified installer." (Milwaukee, Group 1)
 - **Stores subcontract their installation anyway**

"I don't know who their installer is until the guy shows up in my driveway. How do I know if he's certified?" (Milwaukee, Group 2)
- **Better Business Bureau membership would be more credible**

"Better Business Bureau, because it says that they have a good track record." (Chicago, group 1)

- In over half of the cases the salesperson asked lifestyle questions to determine the most appropriate floor covering material
 - This was equally common in big-box and specialty stores
- However, fewer retailers described how the floor covering would perform over time
 - It was somewhat more common for specialty stores to offer this advice than big-box stores
- None of the big-box shoppers received a follow-up call from the store
- A small number of specialty shoppers received a follow-up call

"It's not as if I bought a car. They don't follow-up personally." (Chicago, Group 1)

"It's a small store, we got to be kind of friendly so that's probably the reason they called." (Chicago, Group 2)

- In general, the finished product has lived up to expectations
- If shoppers were advising a friend on a flooring purchase, their advice would include:
 - Do your research
"Do your research! Don't rush research!" (Chicago, Group 1)
 - Shop around
"Bring in at least three companies and compare." (Milwaukee, Group 2)
 - Look at samples in your own home
"Take samples home and live with them for a week." (Chicago, Group 2)
 - Pay attention to installer
"Get the right installer." (Milwaukee, Group 1)
"Watch them install and be critical." (Chicago, Group 2)
 - Think carefully before deciding on self-install
"Unless you have a sense of adventure, lots of patience and someone with you, pay to have it done professionally." (Milwaukee, Group 1)
- Many would also recommend a particular retailer with whom they had a good experience
"Just call Carpet Creations and don't worry about a thing." (Chicago, Group 2)

Detailed Findings: Internet Usage

Internet Research

- Most use the Internet to look at product information at least weekly
- Most actually purchase over the Internet at least two or three times a month
 - However, a few transact on the web much less frequently
"Twice in my life." (Milwaukee, Group 1)
- About half used the Internet to research their most recent flooring purchase
 - Most of these did a general keyword search
 - Most used Google and a few used Yahoo!
- Keywords used included:
 - A particular flooring material (e.g. 'Hardwood Flooring' or 'Carpets')
 - Flooring brand name (e.g. Pergo)
 - Specific model numbers of flooring types
 - Flooring in <area>
 - Installation <flooring material>

- A number went directly to a website
 - In most cases this was homedepot.com
 - "I just typed in Home Depot" (Milwaukee, Group 1)*
 - A few went straight to a manufacturer site
 - "Manufacturer sites: Armstrong and Mannington." (Milwaukee, Group 2)*
- A few also visited websites that were not promotional in nature:
 - Consumer Reports
 - "Consumer Reports because it has all different kinds of flooring." (Milwaukee, Group 2)*
 - DIY sites
 - "I put in a search for installing. They had tips and ideas, what would be best for the application." (Milwaukee, Group 1)*
 - Consumer review sites
 - "I wanted to know people who have gotten bamboo or cherry wood floors, and what they think of it." (Chicago, Group 2)*

Information Sought Online

- Shoppers looked online to find the following kinds of information:
 - General product information (price, pros and cons, applications etc...)
 - Installation information
 - "I never installed it before, so I wanted to have a general idea of what it took, was it going to be over my head..." (Milwaukee, Group 1)*
 - Care information
 - "I don't know the name of it, but they were talking about caring for hardwood flooring." (Chicago, Group 1)*
- Those who researched on the Internet don't necessarily believe that online content is more credible
 - They tend to trust the experience of others
 - "We tend to make our decisions based upon anecdotal experiences you hear from others." (Milwaukee, Group 1)*
 - It depends whether you can tell if the site is reputable
 - "It depends upon whether you can determine if the content is from someone you deem reputable." (Milwaukee, Group 1)*
- Sites that shoppers found to be the most credible included:
 - DIY sites, Consumer Reports, retailer sites, manufacturer sites

- Only around one fourth know what a podcast is
 - They tend to download news, sports and talk radio shows
- Some might listen to a flooring podcast
 - Can learn while you're doing something else

"Imagine how nice that would be; I could go to work and learn about flooring." (Chicago, Group 2)
 - Could listen to prepare for research and shopping

"I might download so that when I did my research or went into a shop I could speak the same the language." (Milwaukee, Group 2)
- Others would not use a podcast
 - Some would rather talk to a real person and ask questions

"I want to hear it directly from somebody where I can get feedback and ask questions." (Milwaukee, Group 2)
 - Others just aren't interested

"I have no interest in putting it on my iPod." (Chicago, Group 2)

Detailed Findings: Website Evaluation

	Average Rating
Usefulness of information	8.8
Overall site experience	8.7
Ease of use & navigation	8.7
Quality of floor covering information	8.6
Credibility of information	8.2

- Overall, very positive reactions following the website tour
- Most aspects were rated eight or nine out of ten

Likes

- **Quantity of information**
"I like the amount of information." (Milwaukee, Group 1)
- **Quality/usefulness of information**
"Lots of helpful information that I would not have known" (Chicago, Group 1)
- **Covers all types of flooring**
"Contains info about all floor coverings." (Chicago, Group 1)
- **Virtual room designer**
"I like the ability to design a room around colors of walls and flooring." (Milwaukee, Group 1)
- **Ease of use**
"It seems very easy to use." (Milwaukee, Group 1)
- **Site organization**
"I can see what I'm looking for right away." (Chicago, Group 2)

Dislikes

- **\$100 draw; it lowers credibility**
"It tend to cheapen the site. I mean, so many sites have those. You doubt anybody has ever won." (Milwaukee, Group 2)
- **Houses are too high-end**
"It's just all high-end showcase looks [...] sends a message like this is going to be pricier, upscale." (Milwaukee, Group 1)
- **Need more info about the WFCA**
"Their whole purpose, the mission. I know it's in there, but somehow it's got to be clearer, more prominent." (Milwaukee, Group 2)
- **Some found it cluttered**
"It's all cluttered. The home page needs to have just a few things" (Chicago, Group 2)
- **Wouldn't know to look for this site**
"I've never heard of the WFCA. I would never have found this website." (Chicago, Group 2)

- Overall, very positive reactions to the Design Center section of the site
 - For some the Design Center would be the first part of the site they visited

"Design Center is the first place I would go." (Milwaukee, Group 1)
- Respondents find the Virtual Room Designer particularly useful
 - Allows them to actually see how potential designs might look

"If you've got a house that's got a red room and you're going to put something else in there, you look for something that's red or change the color of the walls and then pick a carpeting or tile to match it as closely to your own." (Milwaukee, Group 1)
- However, many would prefer to be able to upload a picture of their own room
 - Alternatively, they'd like to be able enter the specifications of their own room

"I'd like to do that, put my own room in there and see what my own room looks like." (Chicago, Group 1)

 - Alternatively, they'd like to be able enter the specifications of their own room

"You could kind of drag and cut and paste things that are similar to what's in your room [...] it might not be yours, but it's similar in size..." (Chicago, Group 1)

- In general, respondents react positively to the Dealer Locator as a tool
 - They would find it helpful in locating a dealer

"I thought it was cool. You can find out where it is. I can call and see whatever I want. You know, I can Mapquest and find out how to get there." (Chicago, Group 1)
 - However, some would also like a link to the dealer's website

"If they have a site, you could link to it." (Chicago, Group 1)
- There are more mixed reactions to the Code of Conduct
 - Some would rather have seen it first

"When I go to the site, I would rather see that first." (Milwaukee, Group 1)
 - Some think the code is too vague

"I thought the code of conduct was a little fuzzy [...] what does it mean? Sensitive and considerate doesn't mean anything to me in terms of floor coverings." (Milwaukee, Group 2)
 - They want to know what it would actually mean in the event of a problem

"I mean, if I get a job in my house that's screwing up and I complain to these people, are they going to stand behind the company? Are they going to stand behind the flooring association?" (Chicago, Group 1)
- Some suggest the addition of customer reviews

"If they added something where if you had a positive or negative experience that you can go on this site and under a particular retailer write what your experience was so that other people would have access to that too." (Chicago, Group 1)

- **Further recommendations for the website include:**
 - **Publicize the website; nobody knew the WFCA existed, so wouldn't know to look for a website**

"Educate the public that you exist. Nobody knows that they exist [...] Find a way to get the word out so you know how to find it." (Chicago, Group 2)
 - **Make more of the WFCA's mission**

"Make a mission statement more prominent on the homepage. It must slap me in the face that the WFCA is an unbiased 3rd party group for the sake of credibility." (Milwaukee, Group 2)
 - **Better highlight the fact that the WFCA has existed for 50 years**

"I guess the big point would be to promote the 50 years strong. Put it right up front because of credibility." (Milwaukee, Group 1)
 - **Have a search function for the site**

"Have a search bar to search within the site." (Milwaukee, Group 1)