

marketmedia24 WIR KENNEN MÄRKTE The latest edition of the study: **Curtains, Screens and Sun Protection** has been published. In February 2017, the market researchers and analysts from Marketmedia24 and NoceanZ wanted to know it exactly: How do consumers think in terms of curtains, screens and sun protection? A fashionable and emotional factor is accounted by almost 46 percent of people buying such products. Desire for a new decoration or the discovery of a great new idea is initiating shopping. For many consumers this happens even every five years.



The power of emotions plays a decisive role - the trend professionals know and recognize in the new "hygge-like" lifestyle (derived from the Danish happiness philosophy Hygge) the return of the consumers back to familiar, even magical worlds – say back home. Where, by the way, one does not go back to the times of cocooning, but rather enjoy live with family and friends in security and individuality.

However, consumers showed the marketing strategies of the sector the red card: The technological added value of modern articles is hardly significant, brands have a just marginal importance, therefore purchasing happens primarily priced-oriented. Eva Barth-Gillhaus, a member of the authors' study team, is certain: "Our consumer survey reveals clearly that in the sales orientation of the manufacturers the communication with consumers missed out. This is regrettable because many brands have a lot to

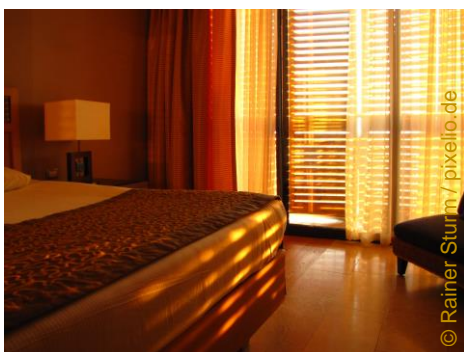
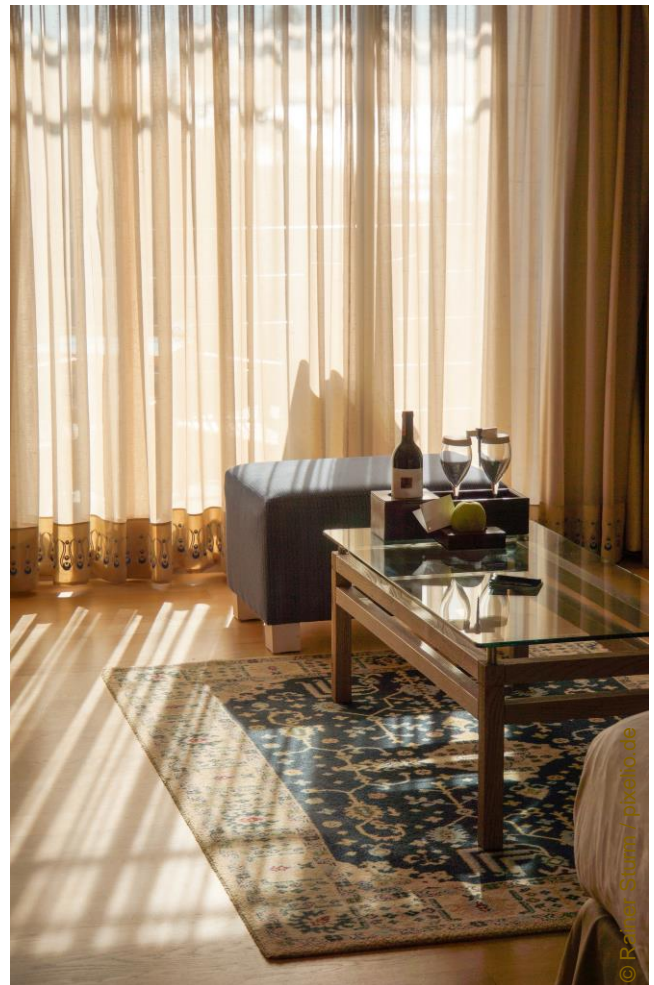


offer. For the brave, however, a wide field opens up for brand strategies to add emotional appeal, pointing out added value and innovation. The value of habitation and the potential of modern products provide an ideal basis. B2C communication undoubtedly is a tour de force, where creative viral strategies and the use of social media may help to save some advertising EUR." The expert predicts that sector campaigns, especially breadthwise, could bear fruit more quickly, but at the same time she has to limit the feasibility: "Perhaps an illusion, but the alternative is interchangeability, dependence on the market partner and the primacy of the price."



Eight sales channels are mainly responsible for the sales on the German market for curtains, screens and sun protection. Handicraft and converters represent the strongest market power, followed by the retail trade. The furniture stores are the number one for the majority of the respondents when it comes to purchasing of curtains, screens and sun protection products. However, this result is not a true reason for joy for those persons involved. Men prefer to buy (about 21%) in hardware stores while women (just under 25%) prefer furniture stores, but only if they do not prefer to sew the curtains and decoration shawls themselves, what is favored by at least 5%. As number two online providers came out of the total survey.

Anyone who is familiar with the life span of furnishing articles will be surprised about the renewal rhythm at the window. While, for example, living room luminaires with an average hanging time of 15 to 25 years prove to be extremely long-lasting, curtains, screens and sun protection products seem to be fast exchanging. After all, almost 39% say they replace the products every five years. A similar group of the same size



changes even more frequently.

At first sight, functional and fashionable buying impulses are balanced. It does not seem to be surprising that 58% of the interviewees call protection from the sun and about 40% the desire for dim-out as purchase reasons. On the other hand, the high number of those who can be infected by "great" discoveries is astonishing.

When asked, "Which brand names do you know spontane-

ously?", the respondents named more than 180 brands. Among them Ado and Goldkante or Otto and My Home as two separate brands. But also stationary and virtual shopping sources were used as brand names for curtains, screens and sun protection such as Amazon, Bon Prix, Textilshop.de, Ikea, DM, Obi, Poco, Tchibo and interior decorators.



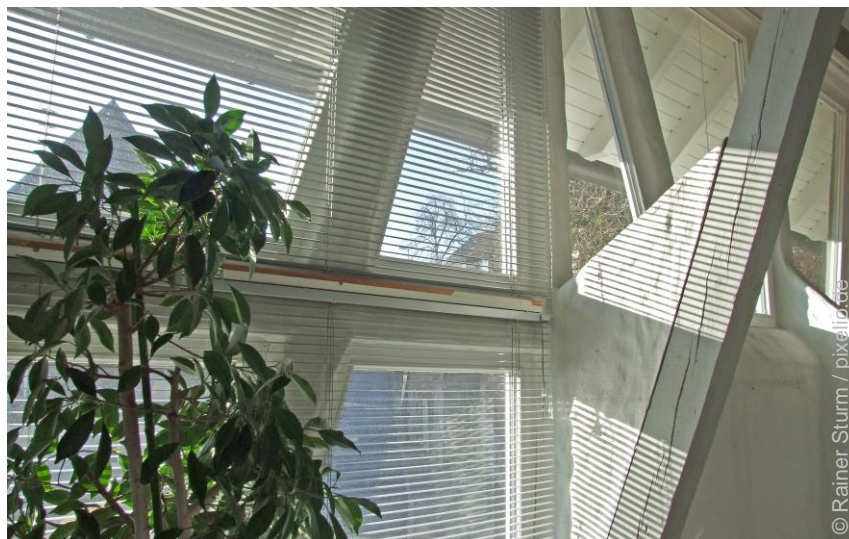
The fact that in a representative survey consumers also named Nivea and Nivea Sun as brand names for curtains, screens and sun protection products, and that the furniture retailer Ikea, after Velux and Ado reached the third highest degree of recognition, shows a dilemma that not only gives the manufacturers / suppliers of the sector a reason to think about.

With such a low degree of brand awareness it is not surprising, that brand products can seldom be found on the shopping lists of consumers. For a real desire this low brand awareness is not sufficient enough. Therefore almost 50% decide on the price. Whether it is a known brand name or a brand product is not important.

But in principle the signs bode well, for textile living as well as for the offers of curtains, screens and sun protection.

Several megatrends and market factors link together to form a powerful market engine. The construction boom and the general demand for residential space are important drivers. In the first eleven months of 2016 already 340,000 new apartments or renovations were approved, 63,600 or 23% more than in the same period of the previous year.

Who as a manufacturer or supplier in the market for screens and sun protection as well as curtains has to decide about larger investments or product innovations - needs to get as much information as possible about the medium and longer-term market development. What has to be expected for the next eight to ten years, until about 2025? Is the growth of the past few years continuing? Is more growth still possible? Or will it weaken, for example because the market is simply saturated? The new sector report 2017 about curtains, screens and sun protection products provides a solid basis for answering such questions.



Textination