

# Repair, Maintenance and Improvement Index

Surveying the Nation's Tradespeople

February 2021



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By the summertime I think Britain will be booming again.

Carpenter, London



The market appears to be buoyant and homeowners are positive about works they'd like completed in 2021.

Electrician, Scotland



““ Once the situation with COVID-19 has improved, there should be some catching up to do. ””

Plumber,  
West Midlands

““ At the moment everything is dependent on lockdown and it's longevity and severity. ””

Builder, Wales

““ As COVID-19 comes under control and customers are ready to start works, more staff will be taken on. ””

Builder, North East

““ 2021 has the potential to be turbulent, but the vaccine will hopefully stabilise the market and give people confidence. ””

Kitchen fitter, Midlands

# Foreword



**Nick Roberts**  
CEO, Travis Perkins Plc



As the UK's largest distributor of building materials, we know first-hand the contribution that the nation's tradespeople make to the economy.



Following the publication of our first RMI Index in August 2020, I am delighted to present the findings of our latest survey into the mood amongst the nation's tradespeople.

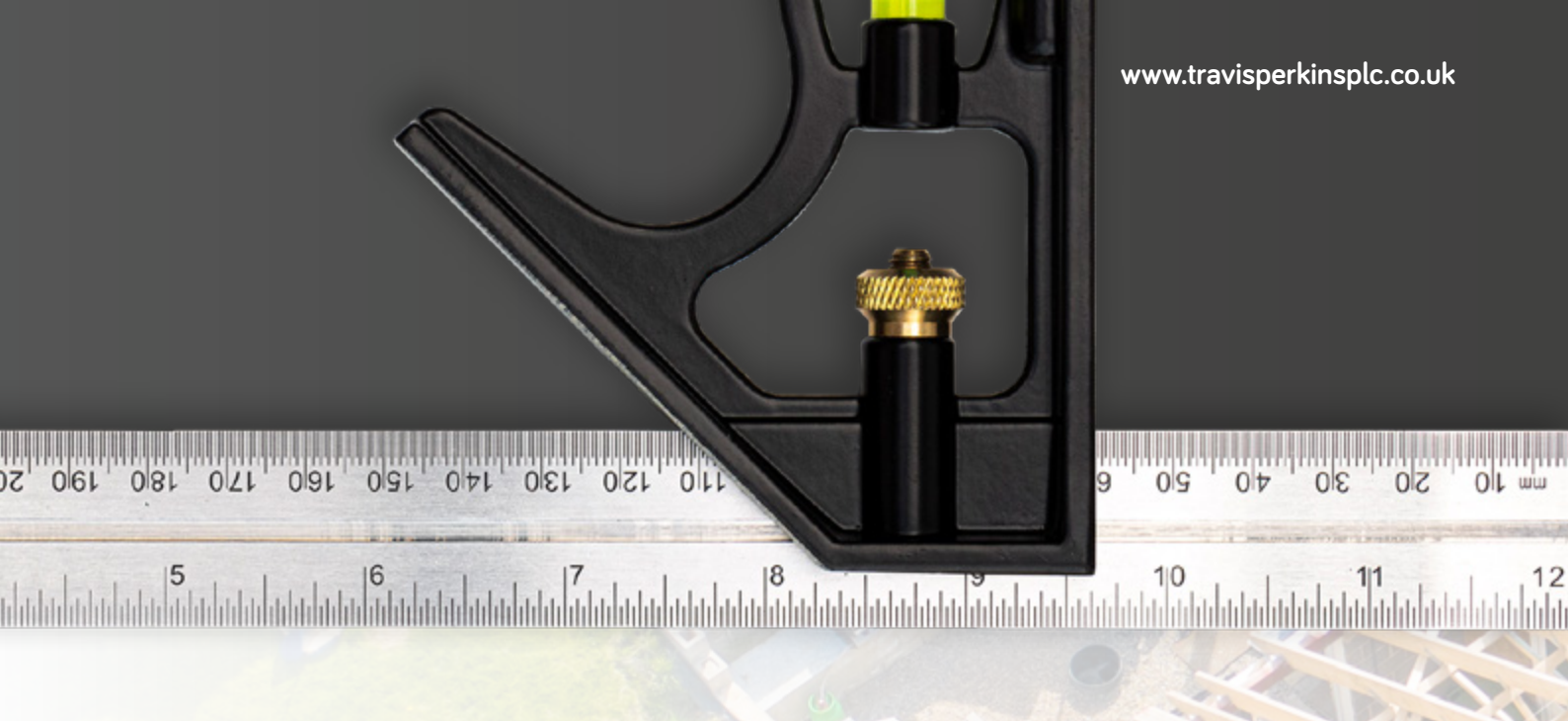
As with our first survey, this report provides an insight into how the tradesmen and women up and down the country feel about their near-term trading prospects, as well as their longer-term assessment of the outlook for 2021.

The contrast between the wider backdrop in which this survey was undertaken and that of August's report is stark – although August 2020 was anything but a “normal” period in the nation's history, the country was still past the peak of the first COVID-19 wave, restrictions were beginning to be relaxed and thoughts were tentatively turning towards recovery and reunion.

Fast forward to January 2021 however, when we surveyed over 1600 respondents for this report, and it is clear that August's hope of a return to normality was premature – we are now well into our third national lockdown, with most of us confined again to our homes during what has been a cold and wet period.

With momentum building around the vaccination programme, the country is hopeful that the tide is beginning to turn against the virus and there is light at the end of the tunnel and this sentiment is reflected in what the nation's tradespeople have told us in this report.

On balance, UK tradespeople remain confident about future workloads and, although a large number believe that their workloads will remain broadly unchanged over the next two months, only a minority think that activity will actually decrease. The picture is even brighter when it comes to expectations for the year as a whole with nearly



nine out of ten respondents stating that they believe their workloads will either increase or stay the same in 2021 versus 2020.

Alongside this longer-term optimism, the UK's tradespeople are seeing an increase in areas of activity that are more attuned to "the new normal" with customers asking them to undertake a higher number of home office conversions and extensions to deal with the established shift towards working from home.

This activity underlines how responsive and flexible the nation's tradespeople have been. It also mirrors how we as a business have sought to change our own ways of working to deal with the fallout from COVID-19.

Our "essential" status has meant we have remained open throughout this extraordinary period of uncertainty; working with the army of builders, carpenters, electricians, plumbers and countless other tradespeople who rely on us to provide them with the materials, products and services they need in order to do their jobs safely.

However, the story of this report is not just confined to the impact of COVID-19.

After months of doubt and speculation around a possible 'no-deal' Brexit, a Trade Deal has now been signed. The vast majority of UK tradespeople have little direct exposure to the EU, and in our last survey, very few expected a no-deal Brexit to directly impact their business. This report confirms that - when it comes to concerns around the ongoing impacts of Brexit and COVID-19, 92% identified the latter as the most likely

to have an impact on their workloads. For the UK's tradespeople at least, the spectre of Brexit still remains low on their list of concerns.

From our perspective, we are pleased by the optimism in the market across many of our customer segments although the ongoing lockdown and the spectre of further disruption by variants of the virus mean that there is still a long way to go. However, we are confident in our ability to continue to support all of our customers, from large scale contractors and housebuilders through to the tradespeople whose responses form the basis for this report.

As the UK's largest distributor of building materials, with a team of over 28,000 colleagues operating from almost 2,000 branches, stores, and sites around the country, we are acutely aware of the contribution that the nation's tradespeople make to the country as a whole.

They have worked tirelessly to help keep the country dry, safe and warm during this unprecedented period of upheaval, so their relative confidence and resilience is something that should be celebrated as we all look to the UK's long-term recovery.

**£26.6 billion**

**The total value of completed domestic RMI work to the economy**

Source - ONS data based on construction output value terms and current prices, 2020

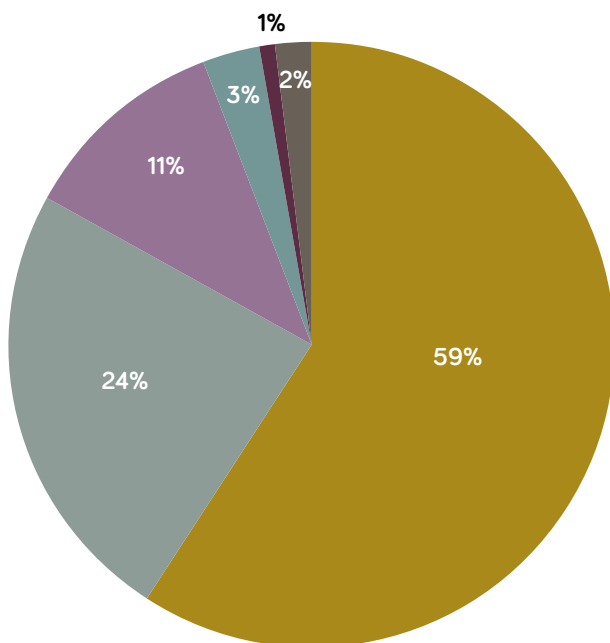
# Who we survey

As the UK's largest distributor of materials and equipment to the building, construction and home improvement markets, we have a unique insight into how the country's tradespeople operate. This report captures the views of over 1,600 tradespeople from all areas of the country in order to understand their views on future workloads, areas of the market driving their business, and issues such as COVID-19 and Brexit.

Customers from our Travis Perkins, Keyline, CCF, Toolstation and Plumbing & Heating businesses were surveyed via email in January and asked to look ahead to the next two months. The responses we received represent a significant cross section of the UK market and span a wide variety of company sizes, from sole traders through to companies employing up to 100 staff. The majority (59%) are sole traders while four out of five employ no more than three people.

## Number of employees

1 2-3 4-7 8-13 14-24 25-101+









## This report captures the views of



1,600+ Tradespeople

Respondents were drawn from across the market and included:

- General builders 
- Bricklayers 
- Plasterers 
- Roofers 
- Painters 
- Plumbers 

# Regional presence

“ We'll get rid of COVID-19 then we might get back to some sort of normality. I am self-isolating until I have had a COVID-19 vaccination. ”

Rofer, Yorkshire and Humberside

**Survey Respondents**  
London and the South East together account for almost a quarter of all survey respondents (26%), followed closely by the South West (18%) and North West (10%).



# Summary and key figures



Despite the challenges arising from the COVID-19 pandemic, the UK's tradespeople still remain relatively optimistic about the near-term outlook for their businesses with almost half expecting workloads to remain the same in the next two months and less than 20% anticipating a reduction.

The vast majority expect domestic repairs and maintenance to be the key driver of their business during this period. Most expect workloads will either be unchanged in 2021 or up on 2020 although almost all believe that COVID-19 will have a greater impact on workloads during the remainder of the year than Brexit.

Heating and plumbing projects have seen seasonal increases although there are notable increases in garden landscaping and renovations as well as home office creations and extensions.

## Looking ahead to the next two months:



**81%** expect workloads to either remain the same or grow



**78%** see domestic repairs and maintenance to be the main driver of their workload



**19%** expect to buy fewer materials

## Longer term:



**87%** anticipate their workload will either remain the same or increase in 2021 versus 2020



**92%** believe COVID-19 will have a greater impact on their workloads in 2021 than Brexit



Once COVID-19 is off the agenda, there should be some catching up to do.



Carpenter, London



# Confidence in future workload



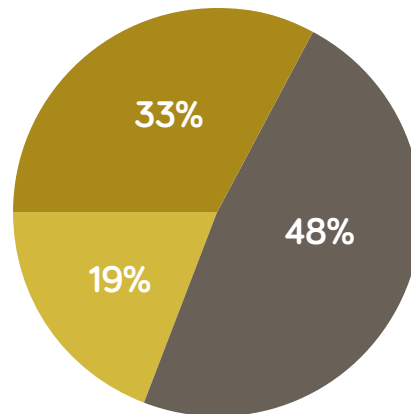
On balance, UK tradespeople remain confident about future workloads. Although a large number (48%) anticipate static workloads over the next two months, just under one in five (19%) think that activity will actually decrease.

The picture is brighter however when it comes to expectations for the year as a whole with 87% predicting that workloads will either increase (38%) or stay the same (49%) now that a Brexit deal has been reached and the COVID-19 vaccination programme is well underway.

The twin issues of Brexit and COVID-19 are far from equal however when it comes to assessing which will have the greater impact on workloads in 2021 with 92% pinpointing COVID-19 as a bigger issue than Brexit (8%).

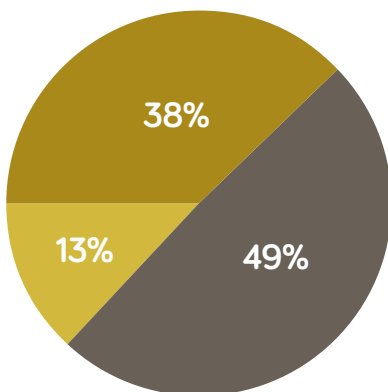
## What do you expect workloads to do over the next two months?

■ Increase ■ Decrease ■ Remain the same



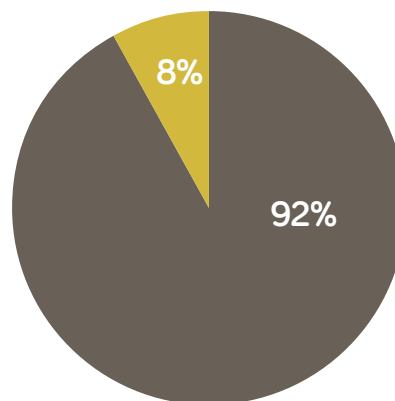
## Now that a Brexit deal has been reached and COVID-19 vaccines are being rolled out, how do you expect your workload will compare for 2021 versus 2020?

■ Increase ■ Decrease ■ Remain the same



## Which do you think will have a greater impact on your workloads in 2021 – Brexit or COVID-19?

■ Brexit ■ COVID-19



# Markets and materials

→ Despite the issues with gaining access to houses in light of lockdown restrictions, a significant majority of respondents highlighted domestic repairs and maintenance as being the main driver of their workloads over the next two months. This is unsurprising given that the majority of respondents (83%) work for businesses employing fewer than three members of staff and are therefore unlikely to have significant exposure to areas such as new build housing alongside the commercial, industrial and infrastructure markets.

## Which industries do you see the majority of your work coming from over the next two months?\*

**78%** Domestic repairs and maintenance

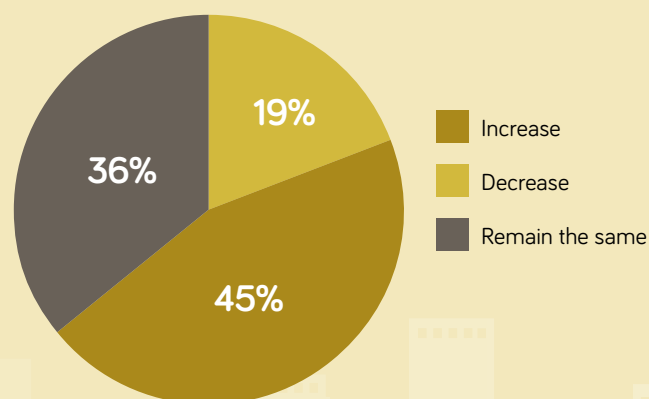
**14%** Public sector

**13%** New build housing

**13%** Commercial and industrial

**2%** Infrastructure

## Do you expect your material purchases over the next two months to...?



“2020 was an exceptionally busy year and 2021 will be more of the same in the landscaping industry.”

Landscaper, West Midlands

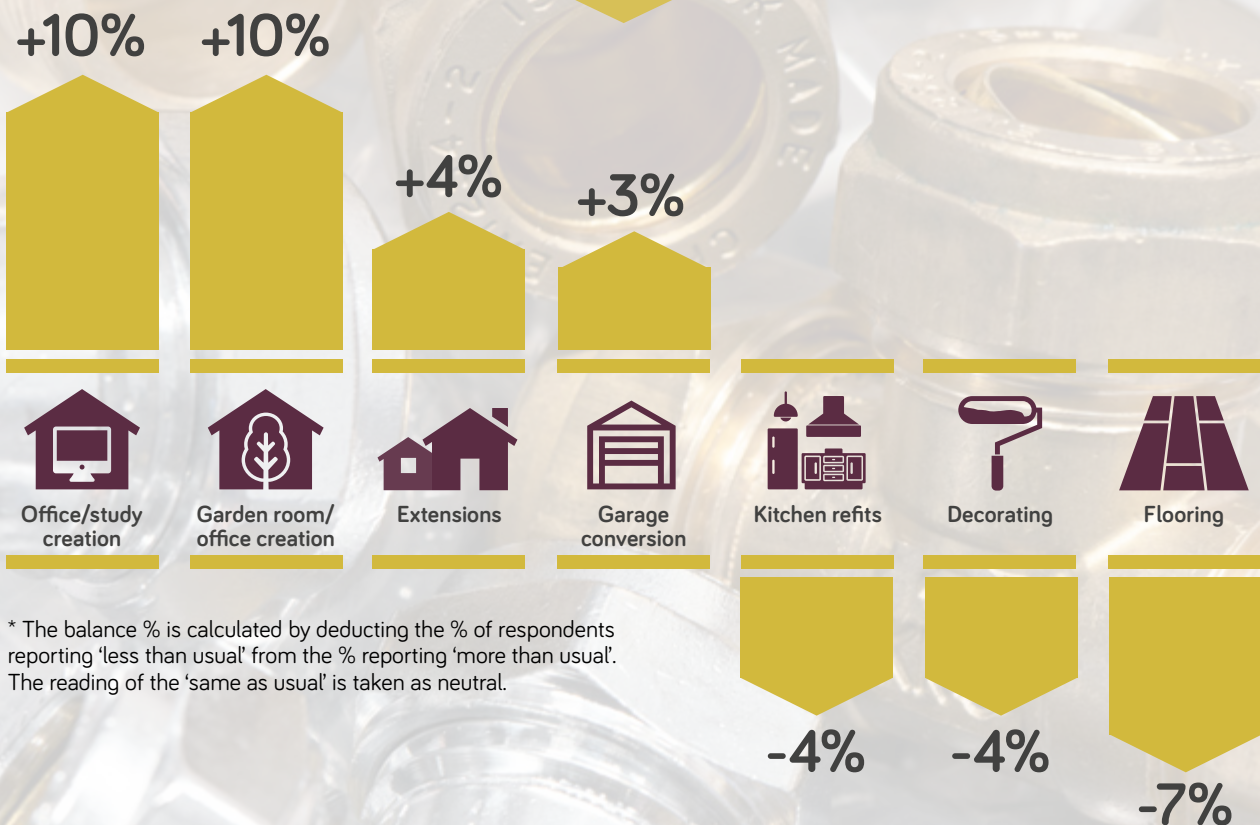
\*This question allowed respondents to select multiple answers to reflect the various types of work tradespeople carry out.

# Markets and materials

→ The responses of those with domestic repair and maintenance workloads highlight that, alongside seasonal projects such as plumbing and heating activity, homeowners are focussed on “new normal” projects with a notable increase in work being done on office and study conversions, driven by the expectation of a future where homeworking is significantly more common.

There has also been an increase in garden office and garden room creations, further highlighting the rethinking going on in many households resulting from more time at home.

## Balance of projects being completed\*



\* The balance % is calculated by deducting the % of respondents reporting 'less than usual' from the % reporting 'more than usual'. The reading of the 'same as usual' is taken as neutral.



Lockdown has made people consider how their house works for them, so the longer lockdowns go on, the more work they want doing.

Plumber, South East



# Conclusion

→ Although COVID-19 is unlikely to disappear altogether for a considerable time yet, the future is looking brighter with vaccinations providing us all with a long-term route out of the pandemic.

During this period of intense uncertainty, the nation's tradespeople have continued to perform the essential repair, maintenance and improvement work that has been vital to ensure that the country remains operational; be that in a domestic setting, as part of the drive to deliver much needed new housing or in the context of maintaining the UK's vital infrastructure.

The importance of the construction sector to the UK cannot be overstated – according to the latest ONS figures, it contributes £155 billion to the UK economy, 6% of total economic output and directly supports 2.2 million jobs the length and breadth of the country, not to mention the hundreds of thousands of other architects, engineers, quantity surveyors and plant hire providers whose livelihoods depend on it.

UK tradespeople are at the absolute heart of this eco-system and will play a key role in our economic recovery as the country looks to build cleaner, greener and better.

This report bears testament to their ability to see through the short-term headwinds currently buffeting our economy and plan for a year

of recovery and continued resilience. Their demand for materials remains undiminished, their level of resilience remains high, and their optimism for the year ahead is reassuring.

Challenges still remain of course, both in emerging from the COVID-19 crisis and dealing with the aftermath of Brexit, but the overarching picture from the tradespeople that we surveyed is one of cautious optimism.

Workloads remain robust, projects continue to be undertaken despite the lockdown restrictions and homeowners are increasingly looking to adapt their homes to deal with the changes we as a society have seen over the past year.

2020 was a challenging year for the sector and the country as a whole, but the UK can take comfort from the fact that its tradespeople remain committed to supporting their customers and communities as the country looks to recover and rebuild.

We are acutely aware of the role that we play in helping to deliver this recovery, and we are confident that the changes we have made to our own ways of working mean that we are better placed than ever to provide the materials, products and services that the country's tradespeople need.



# Our businesses

## Travis Perkins <sup>plc</sup>

Travis Perkins plc is the UK's leading supplier of materials and equipment to the building, construction and home improvement markets. With annual revenues of £7bn, the Group employs 28,000 colleagues across the UK, France and Benelux and is proud to have helped to build Britain for over 200 years.

[www.travisperkinsplc.co.uk](http://www.travisperkinsplc.co.uk)

### Our best known businesses:



#### **TOOLSTATION**

One of the UK & Europe's fastest-growing suppliers of tools, accessories and building supplies to trade and DIY customers via a multi-channel offering.

**540+ branches**

#### **TP Travis Perkins**

The UK's largest network of builders merchants supplying building materials and tool hire to trade customers.

**550+ branches**

#### **Wickes**

A one-stop-shop for construction and home improvements supplies and materials for homeowners and the building trade.

**230+ stores**

#### **Keyline** CIVILS SPECIALIST

A specialist supplier of heavy building materials and drainage solutions with tool hire for trade professionals and contractors in the construction industry.

**40+ branches**

#### **BENCHMARK** **Kitchens and Joinery**

Provides a range of high quality kitchen ranges, appliances, worktops and joinery to specialist trade customers.

**150+ branches**



These businesses provide plumbing, heating and electrical supplies for the trade, home improvement and DIY markets.

**350+ branches**



Pipeline & Heating Solutions

The country's largest distributor of pipeline and heating solutions, for a wide range of sectors and trades.

**50+ branches**



A nationwide distributor of insulation and interior building products with a comprehensive stock for interior building specialists, contractors and builders.

**35+ branches**

Travis Perkins 

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