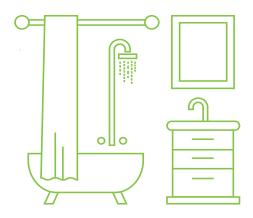
2017



U.S. HOUZZ BATHROOM TRENDS STUDY



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Big Ideas

STATEMENT SHOWERS; LOSE THE TUB

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

AGING IN PLACE DRIVES SPEND

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

MILLENNIALS CRAVE MORE SPACE

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

SAN FRANCISCIANS SPEND THE MOST ON REMODELS

Among the top 20 U.S. metro areas, homeowners in San Francisco spend the most on a master bathroom remodel, 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.

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. 58% in 2016). Also, the demand for high-tech bathroom features grew significantly year over year, with 29% of upgraded toilets and 12% of upgraded showers boasting these features (compared with 24% and 9%, respectively, in 2016).



At a Glance

Renovated Master Bathroom Characteristics

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

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



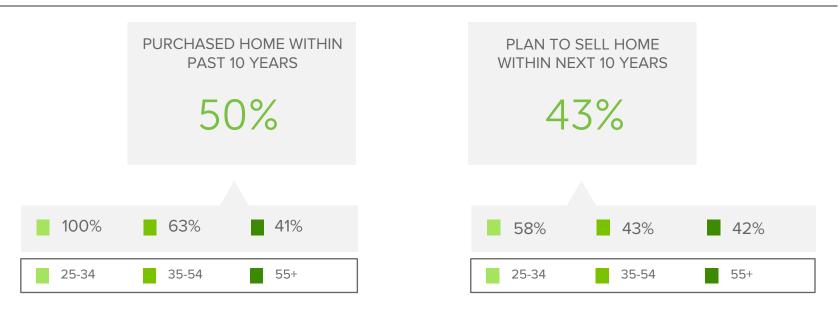
About Bathroom Renovating Homeowners



Boomers Spend to Stay

Two in three homeowners (65%) who are renovating their master bathroom are 55 and older ("Baby Boomers"). Most of 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 and are more likely to think of their homes as a short- to medium-term residence.

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



Breakdown of Renovating Homeowners by Age Group



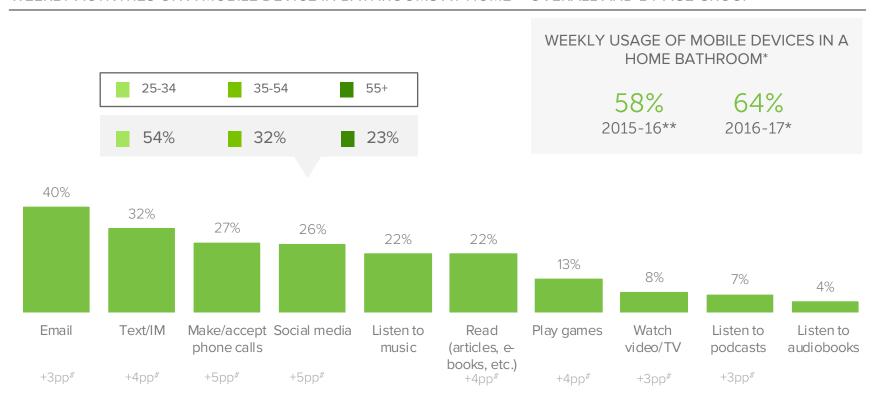
^{*}Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation during 2016-17.



Netiquette in the Bathroom?

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

WEEKLY ACTIVITIES ON A MOBILE DEVICE IN BATHROOMS AT HOME - 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 completed, were working on, or were planning a master bathroom renovation during 2015-16 (see 2016 study).

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



Budget and Spend



\$21K Masters

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

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



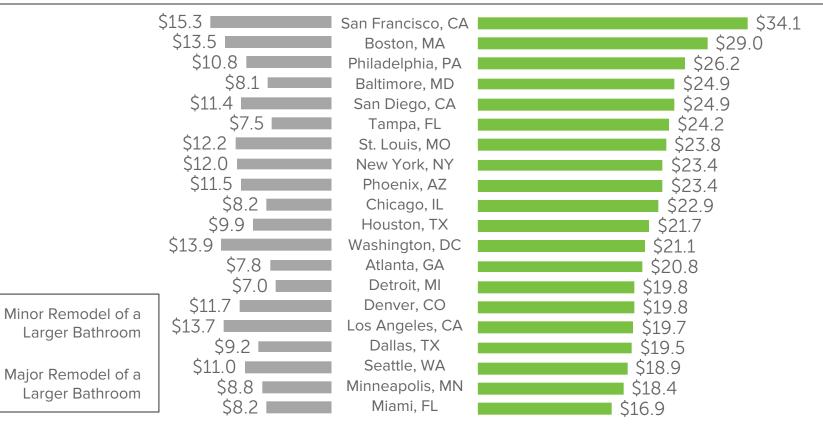
^{*}Average spend on master bathroom remodels combines data from this study with data on spend reported in the Houzz & Home Study for 2015 and 2016. *Major master bathroom remodel* refers to a remodel in which at least the cabinetry/vanity, countertops, and toilet are replaced; *minor master bathroom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



San Francisco Has Highest Remodel Costs

The San Francisco metropolitan area commands the highest master bathroom remodel spend, averaging \$34,100 for 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 a larger bathroom is the lowest in the Miami metropolitan area (\$16,900).

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



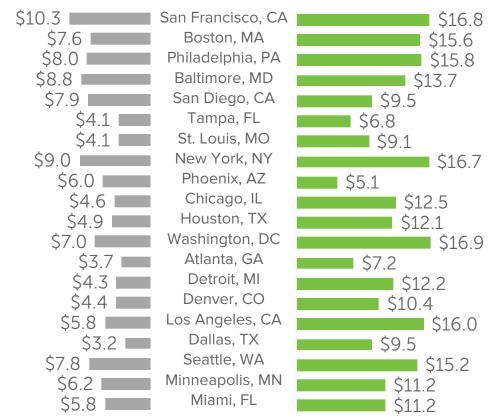
^{*}See Page 9 footnote for sources and remodel and size definitions; top 20 metros exclude Riverside and include Baltimore instead due to sample size limitations.



Coastal Cities Command Greater Spend

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 remodel, with other major West Coast cities not far behind.

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.



Minor Remodel of a

Smaller Bathroom

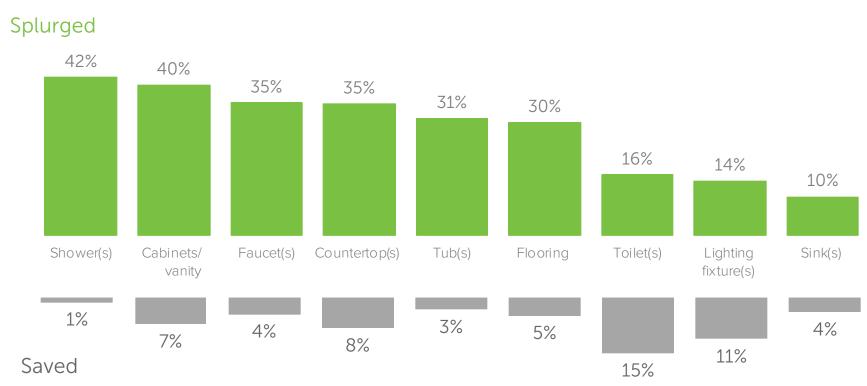
Major Remodel of a

Smaller Bathroom

Splurge or Save

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

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



^{*}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 renovation during 2016-17.



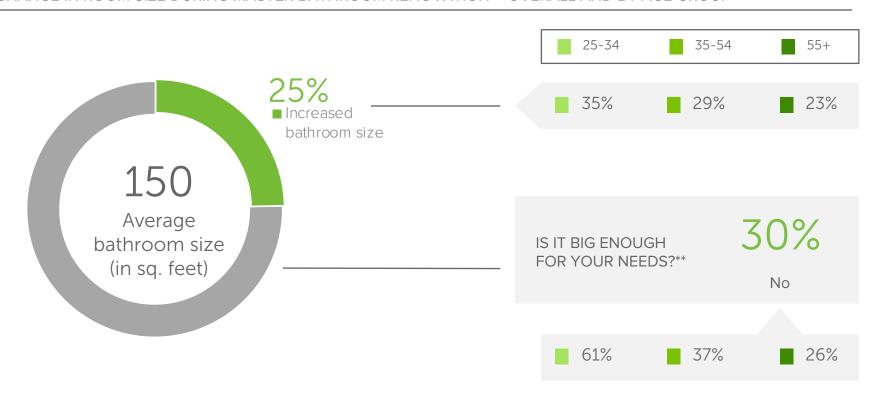
Scope and Pro Hiring



A Yearning for Space

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

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.

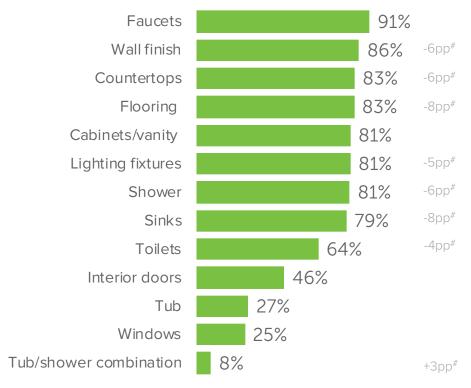
^{**}Percentages reflect proportion of homeowners who are not increasing room size as part of their completed, current, or planned 2016-17 master bathroom renovation.



Fewer Gut Renovations

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 upgrades (79% vs. 87%, respectively). That said, 43% of renovating homeowners are changing the layout of their master bathrooms and 55% are increasing the size of their showers.

UPGRADED MAJOR FEATURES IN MASTER BATHROOM RENOVATIONS*



MAJOR CHANGES IN MASTER BATHROOM*

55%
Increase in shower size

43%
Layout change

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

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



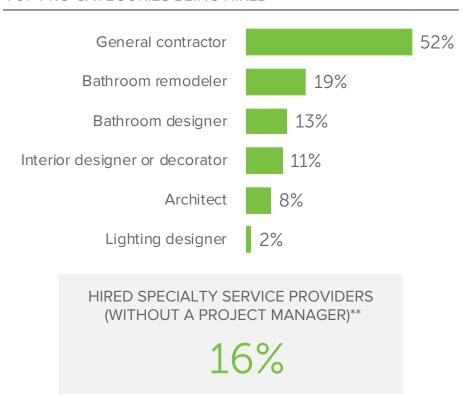
Having a Project Manager Is Key

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

PRO HIRING*



TOP PRO CATEGORIES BEING HIRED*



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

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

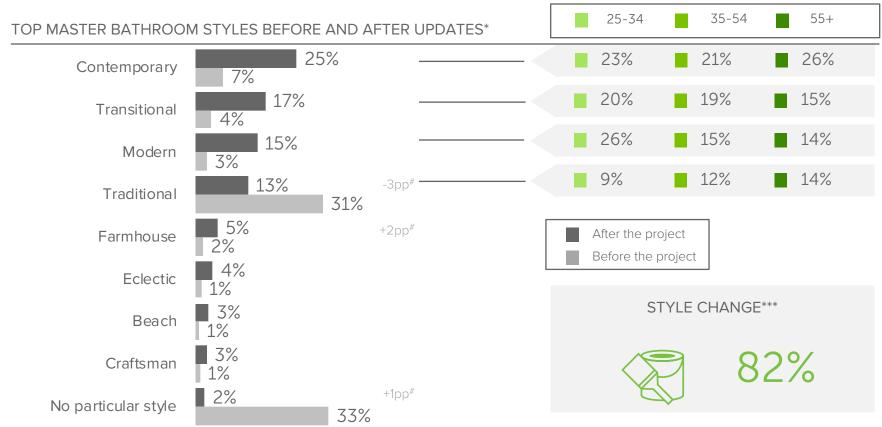


Look and Feel



Young and Modern

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



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

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



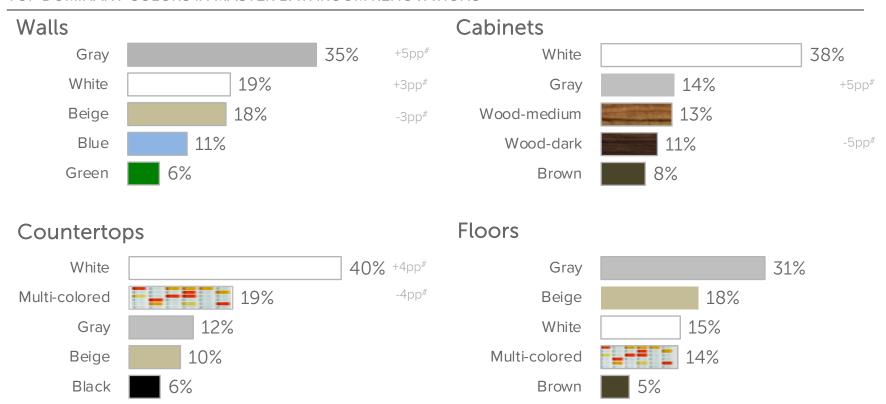
^{**}Percentages reflect proportion of homeowners who have completed, are currently working on, or are planning a master bathroom renovation during 2016-17.

^{***}Percentage updated due to error on September 20th, 2018

Against the Gray Backdrop

White continues to gain popularity in renovated master bathrooms, with even more countertops and walls appearing in white this year (40% and 19%, respectively) compared with 2016 findings. Additionally, bathroom features are increasingly contrasted against gray walls and cabinet surfaces. Notably, dark wood cabinetry and multicolored countertops are less common in 2017 compared with 2016.

TOP DOMINANT COLORS IN MASTER BATHROOM RENOVATIONS*



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

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



White and Gray Keep Millennials Cool

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

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.

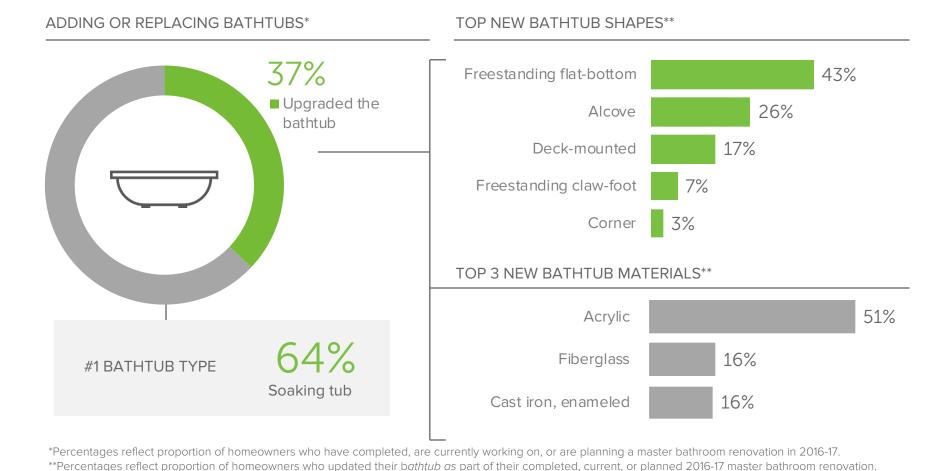


Products and Finishes



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

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

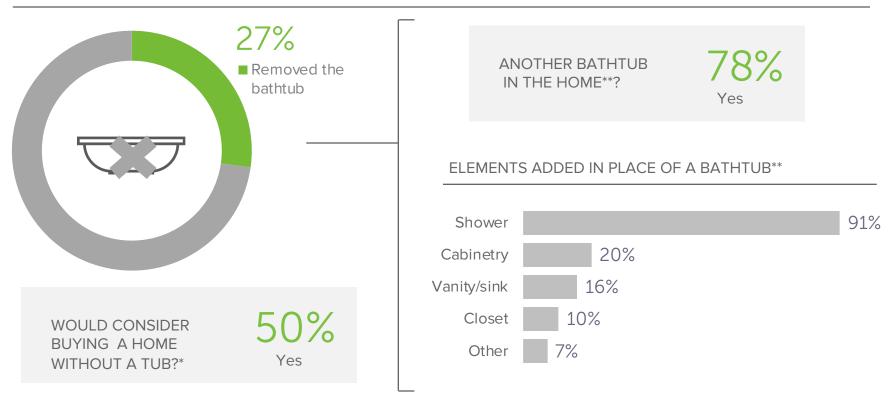




Tub? What Tub?

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

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.

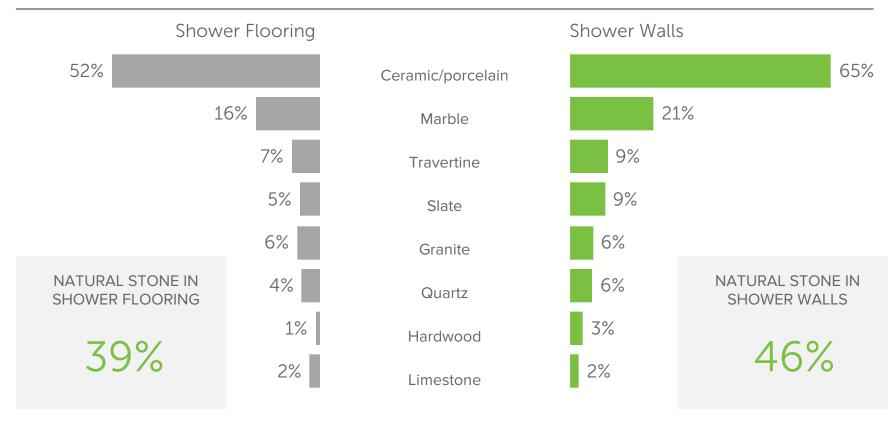
^{**}Percentages reflect proportion of homeowners who removed their bathtub as part of their completed, current, or planned 2016-17 master bathroom renovation.



Shower Surfaces of Tile and Stone

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

NEW FLOORING AND WALL FINISHES IN UPDATED MASTER SHOWERS*



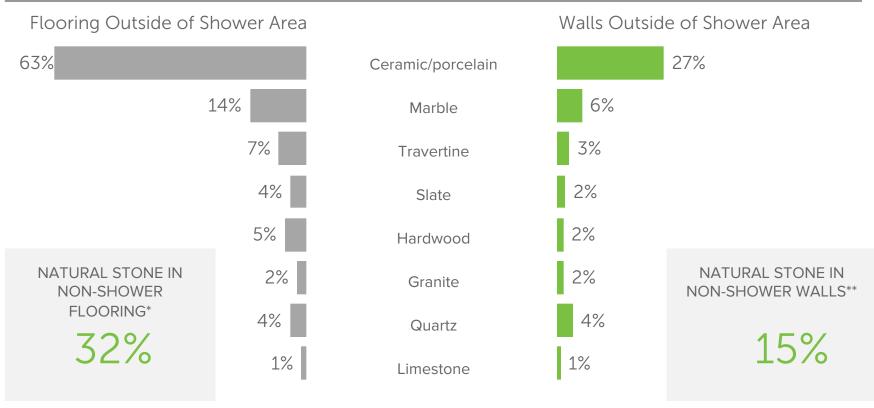
^{*}Percentages reflect proportion of homeowners who are updating showers as part of their completed, current, or planned 2016-17 master bathroom renovation.



Seeking Continuity

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 look of the shower with the rest of the bathroom surfaces. These higher-end finishes are less likely to appear on walls outside of the shower area.

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



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

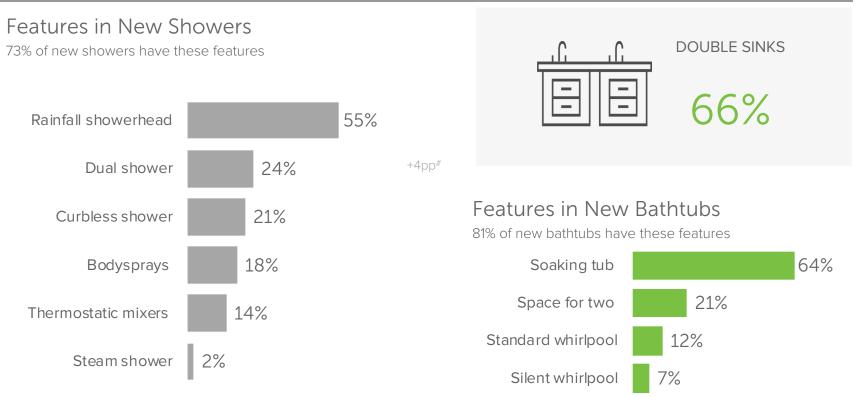
^{**}Percentages reflect proportion of homeowners who are updating their wall finish as part of their completed, current, or planned 2016-17 master bathroom renovation.



A Touch of Shower Luxury

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

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



^{*}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 bathroom repoyation

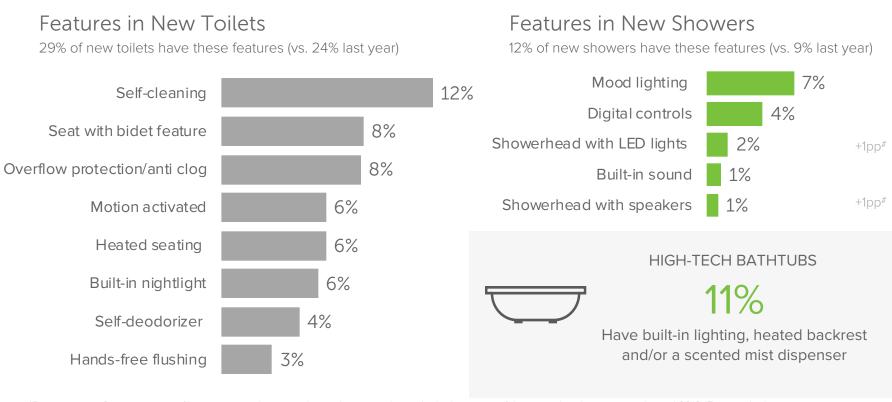
^{*}Reflect percentage point difference between 2017 and 2016 study findings; shows only statistically significant differences at 90% confidence levels (see 2016 study).



Flush with Tech

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

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



^{*}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.

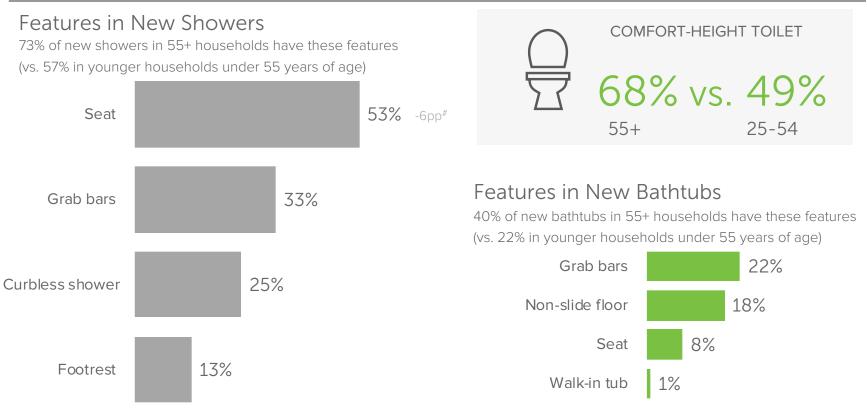
#Reflect percentage point difference between 2017 and 2016 study findings; shows only statistically significant differences at 90% confidence levels (see 2016 study).



Prioritizing Accessibility

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

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



^{*}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.

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



Bathroom Bestsellers

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



Bathroom Accessories



Toilets



Bathroom Vanities and Sink Consoles



Towel Bars and Hooks



Bathroom Cabinets and Shelves

• 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

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

COMPLETES AND QUALIFICATIONS

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

SAMPLING AND WEIGHTING

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 not meet the qualification criteria above were then eliminated. Respondents were notified that aggregate findings would be shared with the larger Houzz community to help others in completing their own bathroom renovations. The final data were reviewed to ensure representativeness of the Houzz user populations.



Appendices



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

Full Non-Master Bathroom Features

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



B. Breakdown of Shower Finishes by Age Group

NEW SHOWER FLOORING FINISH BY AGE GROUP* NEW SHOWER WALL FINISH BY AGE GROUP* 25-34 55+ 25-34 35-54 55 +35-54 Ceramic/porcelain tile 60% 48% 53% 72% 62% 66% Marble 4% 21% 14% 17% 27% 18% 8% Travertine 4% 7% 11% 6% Granite 4% 6% 4% 10% 8% 8% 20% 4% 6% Slate 10% 4% 7% 8% 7% 4% 4% 4% 6% Quartz Hardwood 2% 0% 0% 1% 3% 4% Limestone 0% 4% 2% 0% 2% 2%

^{*}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

NEW NON-SHOWER FLOORING FINISH BY AGE GROUP* NEW NON-SHOWER WALL FINISH BY AGE GROUP* 25-34 35-54 55+25-34 35-54 55+ Ceramic/porcelain tile 59% 63% 62% 36% 25% 27% 15% 19% 12% Marble 5% 5% Travertine 2% 9% 5% 1% 4% Granite 5% 3% 5% 0% 2% 10% 5% 6% Slate 5% 0% 2% 2% 2% 3% 2% 2% 1% Quartz 0% 6% 4% 5% Hardwood Limestone 2% 1% 0% 1% 1% 0%

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



D. Links to Resources on Houzz

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

PHOTOS	FIND PROS	BROWSE PRODUCTS	ARTICLES
Bathroom	Architects & Building Designers	Bathroom Vanities	Bathroom Workbook
Powder Room	Cabinets and Cabinetry	Bathroom Vanity Lighting	Bathroom Makeovers
¾ Bath	Design-Build Firms	Tile	Bathroom Color
Kids' Bath	General Contractors	Showers	Half Baths
Master Bath	Home Builders	Bathtubs	Bathtubs
Contemporary Bath	Interior Designers and Decorators	Bathroom Faucets	Showers
Modern Bath	Kitchen & Bath Designers	Bathroom Sinks	Bathroom Sinks
Transitional Bath	Kitchen & Bath Remodelers	Bathroom Accessories	Bathroom Storage
		Medicine Cabinets	Bathroom Vanities
		Bathroom Cabinets and Shelves	Bathroom Tile
		Bath Linens	
		Toilets	
		Bidets	
		Urinals	
		Bathroom Fixture Parts	
		Cabinet & Drawer Hardware	

