



PRESS RELEASE

March 9, 2018

OpinionWay Survey for Saint-Gobain

The French and their comfort: when the home defines well-being

With winter at its height, Saint-Gobain is revealing the results of a study on “the French and their comfort.” This study ties in with the ongoing consumer advertising campaign aimed at promoting the brand’s contribution to the comfort of each of us, launched last November. Conducted by OpinionWay on a sample of 1,500 people, the survey reveals that the French view the comfort of their home as inseparable from their general well-being and identifies the main trends and characteristics of housing in each of France’s five broad regions.

| KEY SURVEY RESULTS | |
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| Almost 90 percent of the French consider that comfort in their home directly affects their well-being. | Almost 50 percent of the French have carried out renovation work on their home in the past five years. |
| 80 percent of the respondents believe that the quality of materials is the main factor in their decision. | More than 50 percent of the French are considering renovations within the next 12 months. |
| For 96 percent of the French, thermal insulation is the main factor for a comfortable home. | |

The French still aim to improve comfort in their home

Comfort is a key aspect of well-being for the French

Almost 90 percent of the French consider that comfort in their home is central to

their well-being. This figure is even higher when the respondents have at least one child (92 percent).

Comfort is trending positively

Almost 40 percent of the French say that comfort in their home has improved in the past five years. This fact is reflected in the findings that 65 percent of the respondents claim to have cut their energy bills and 55 percent have seen an improvement in their thermal comfort at home. The French raise an important point concerning the improvement of indoor air quality, as 63 percent believe that this factor has remained unchanged within their home.

Insulation: the number one factor for improving comfort in the home

96 percent of the French equate comfort with good thermal insulation, and 67 percent believe that being well insulated from cold weather is synonymous with a comfortable home. Furthermore, more than 30 percent of respondents say that insulating the walls is the most efficient way of insulating the home. On the other hand, in the Paris region, residents see installing appropriate windows as the most efficient way to insulate their homes. Noise insulation is also high on the list, as 95 percent of the French say it is one of the top three factors ensuring a comfortable home.

Households see renovation work as essential

The French say yes to renovation work on the home.

47 percent of the respondents had carried out renovation work in the past five years and 42 percent of French are planning to do work in the coming 12 months.

Insulation tops the list

As insulation is seen as the main factor for a comfortable home, 66 percent of the French have insulated their home by installing or replacing windows, and insulating roof cavities, ceilings or walls. This finding is common to three of the five broad regions: 74 percent of residents in northeast France have undertaken insulation work (of whom 24 percent have insulated their walls), 39 percent in the southwest and 37 percent in the northwest have insulated their roof cavities.

Quality of materials determines successful renovation work

Quality materials above all else

80 percent of the French say that the quality of materials is the number one deciding factor when carrying out renovations. Durable and solid materials come second at 68 percent, followed by the ease of installation for 43 percent of the French.

Preference for professionals rather than DIY

61 percent of the French use professionals (architects, trade professionals/craftsmen, etc.). Southwest France differs from the other regions, as a majority of respondents (58 percent) in this part of the country carry out the work themselves.

Main home renovation trends by region

Despite regional differences, thermal insulation is the number one factor defining a comfortable home everywhere in France.

GREATER PARIS REGION

Noise insulation deemed essential for comfort by greater Paris region residents

- Almost 60 percent of greater Paris region residents think that home comfort is primarily dependent on good noise insulation (compared with 52 percent for the national average).
- 40 percent of residents in this region believe that the most efficient way to insulate their home is to install appropriate windows (compared with 31 percent for the national average).
- 57 percent of residents in this region believe that being well insulated against cold weather is the factor defining a comfortable home (compared with 67 percent for the national average).
- 23 percent of greater Paris region residents believe that noise insulation is a priority for their home (compared with 13 percent for the national average).

NORTHWEST FRANCE

The region where comfort improvements are the most prevalent

- 69 percent of residents in northwest France believe that being well insulated against cold weather is the factor defining a comfortable home (compared with 67 percent for the national average).
- 49 percent believe that energy savings is the second most important criteria in defining a comfortable home (compared with 47 percent for the national average).
- 69 percent of residents in northwest France believe that home comfort has improved in terms of energy savings (compared with 38 percent for the national average).
- Almost 50 percent of the region's residents believe that the comfort of their home has improved (compared with 40 percent for the national average).

NORTHEAST REGION

More attention to energy savings

- 53 percent of residents in this region believe that low energy consumption is the primary factor defining a comfortable home (compared with 44 percent for the national average).
- 69 percent of these residents believe good insulation against cold weather is a defining factor for a comfortable home (compared with 67 percent for the national average).
- Almost 50 percent of respondents in this region choose to focus their home renovations on insulation (compared with 44 percent for the national average).
- 58 percent trust trade professionals' advice for information about the work required (compared with 49 percent for the national average).

SOUTHWEST REGION

A range of comfort requirements in this region

- 75 percent of residents in this region believe that good insulation against cold weather is the main factor defining a comfortable home (compared with 67 percent for the national average).
- Indoor air quality is another major factor as 50 percent of residents in this region believe that a comfortable home necessarily equates to good indoor air quality.
- Almost 60 percent of the residents in this region have carried out renovation work themselves (compared with 44 percent for the national average).

SOUTHEAST REGION

A cool home in summer is the number one priority

- 40 percent of residents in this region state that a cool home in summer is a comfortable home (compared with 34 percent for the national average).
- 15 percent have installed air-conditioning to improve comfort in their home (compared with 8 percent for the national average).
- 41 percent quote insulation against external noise as an important factor (compared with 36 percent for the national average).
- 42 percent of residents in this region trust their friends and family for advice before carrying out any renovation work (compared with 36 percent for the national average).

A copy of the full study and its regional findings is available on demand.

Method: This study was conducted by Opinion Way for Saint-Gobain on a representative sample of 1,500 people residing in France aged 18 or over. The interviews involved an online self-administered questionnaire (CAWI – Computer-Assisted Web Interviewing) from October 26 to November 7, 2017.

ABOUT SAINT-GOBAIN

Saint-Gobain designs, manufactures and distributes materials and solutions which are key ingredients in the wellbeing of each of us and the future of all. They can be found everywhere in our living places and our daily life: in buildings, transportation,

infrastructure and in many industrial applications. They provide comfort, performance and safety while addressing the challenges of sustainable construction, resource efficiency and climate change.

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