

A scenic rural landscape at sunset. In the foreground, there are several red barns with weathered siding and metal roofs. The background features rolling hills covered in trees with vibrant autumn foliage in shades of orange, red, and yellow. A winding road is visible on the right side of the image. The sky is filled with dramatic, dark clouds, with a bright glow from the setting sun breaking through on the left side.

tsw rural

Home Improvement
Research

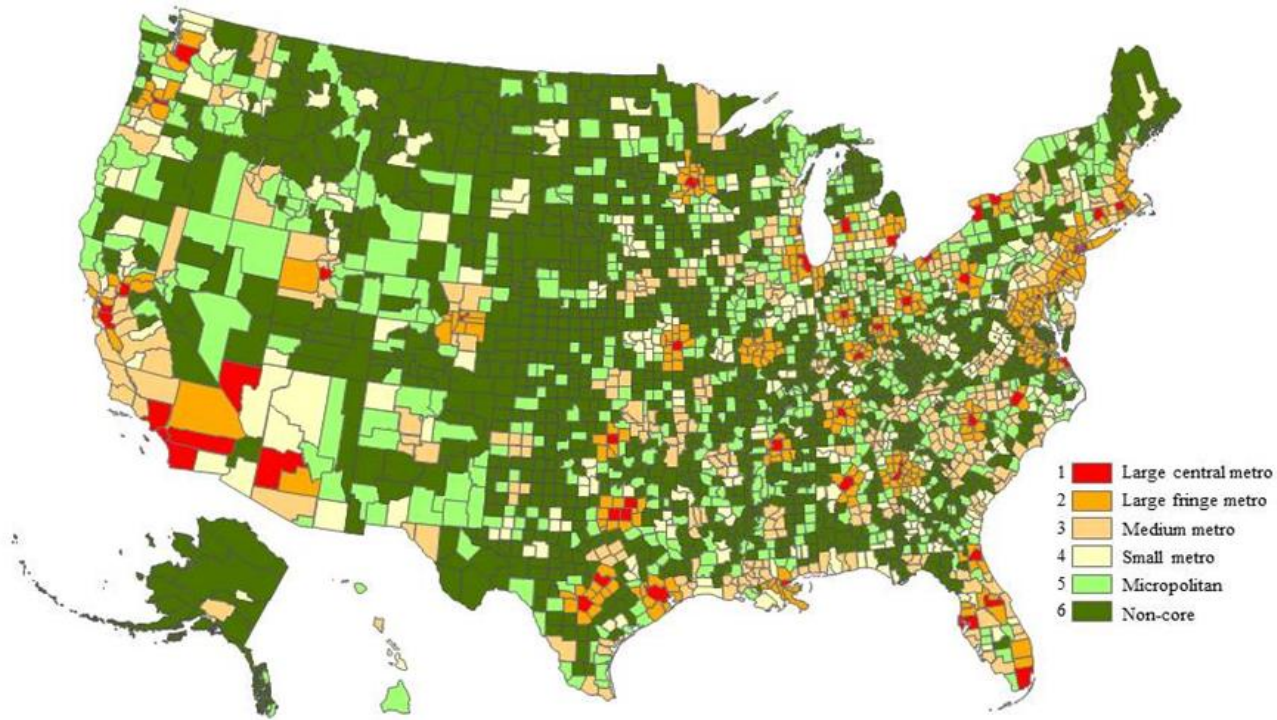
Over 60 million Americans live in Rural America

Who are they and why are they key to the
home improvement market?

Demographic Overview

	D County	C County	B County	A County
Gender	50.2% Female, 49.8% Male	52.7% Female, 47.3% Male	52% Female, 48% Male	51.7% Female, 48.9% Male
Average Age	57 Years Old	50 Years Old	44 Years Old	46 Years Old
Average Income	\$49,000 Per Year	\$55,000 Per Year	\$63,000 Per Year	\$76,000 Per Year
Race	81.5% White 11.8% African American 6.0% Other 0.7% Asian	85.3% White 6.7% African American 6.0% Other 2.0% Asian	74.3% White 11.4% African American 8.9% Other 5.4% Asian	66.1% White 14.6% African American 10.8% Other 8.4% Asian
Ethnicity	92.8% Non-Hispanic 7.2% Hispanic	89.3% Non-Hispanic 10.7% Hispanic	84.7% Non-Hispanic 14.3% Hispanic	79.1% Non-Hispanic 20.9% Hispanic
Percentage Homeowner	77%	72%	66%	65%
Average Number of People in Household	Eight Or More	One	Six	Seven

US Audience Population





**RURAL AMERICA IS THE PERFECT
MARKET FOR HOME IMPROVEMENT**

Check out these stats...

Home

	D County	C County	B County	A County
Single-Family Homes	98	104	106	96
Multi-Dwelling Units	59	81	88	129
Pay Off Mortgagee	146	150	96	70
Sell or Change Home	97	162	94	84
Complete Home Improvement	127	88	96	98

Home Improvement Statistics

Home improvement in the last two years...

Rural households reported 21,141 projects

Urban households reported 8,742 projects



Systems & Equipment

- Plumbing/pipes
- Electrical systems
- Plumbing fixtures
- HVAC
- Appliances/major equipment

Remodeling

- Kitchen
- Bathroom

Room Additions & Renovations

- Kitchen
- Bathroom
- Bedroom
- Recreation room

Exterior Additions & Replacements

- Roofing
- Siding
- Windows/doors

Other Additions & Replacements

- Deck/porch
- Patio/terrace/detached deck
- Garage
- Carport
- Shed
- Swimming pool/recreational structure

Homeowners of Rural America

- Rural buyers spend on average \$133,722 for their home
 - Home prices in rural markets are 26% cheaper per square foot than in suburban markets and 56% cheaper than urban markets
- Rural markets have the *highest* homeownership rates in America
 - 76% of rural residents own their home, as compared to 50% in urban areas
 - Rural homeowners also plant deeper roots than their urban counterparts
 - 67% of rural homeowners never plan to sell their home
 - 32% of rural homeowners plan to pass their homes on

These stats tell a story of why home improvement is so important to this demographic!

Home Improvement: D County Indexes

D County homeowners are more likely than the national average to spend between \$1,000 - \$2,000 on home renovations (115).

In the next 12 months, they are more likely to:

- Remodel family room/den (159)
- Add a garage (157)
- Add a deck (137)
- Install wall-to-wall carpeting (131)
- Complete roofing renovations(128)
- Remodel kitchen counter tops (123)
- Add new bathroom faucets and other bathroom plumbing (114)
- Remodel basement/attic/garage (112)

Home Improvement: D County

In the next 12 months, D County residents are more likely to purchase:

- Riding tractor/mower (194)
- Separate heating room system (193)
- Garden tractor (167)
- Garden tiller (152)
- Chainsaw (144)
- Pressure washer (129)
- Room air conditioner (129)
- Yard trimmer (129)
- Portable room heater (116)
- Separate clothes dryer (vs. stacked washer/dryer) (116)
- Hand-held, non-power tools (111)
- Portable room heater (111)
- New refrigerator (102)
- Gas stove/range (97)
- Separate home freezer (92)



Home Improvement: C County Indexes

C County residents:

- Are more likely to spend between \$0 - \$1,000 on home renovations (127)
- Are more likely than the national average to complete renovations themselves (128)

In the next 12 months, they are more likely to:

- Add a garage (198)
- Add wall paneling (173)
- Remodel basement/attic/garage (151)
- Install wall-to-wall carpeting (147)
- Redo attic fans/vents (128)
- Install weather stripping (128)
- Add a deck (126)
- Change door knobs/locks (112)

Home Improvement: C County Purchasing Indexes

In the next 12 months, C County residents are more likely to purchase:

- Storage shed (162)
- Heating gas/oil (152)
- Fertilizer spreader (139)
- Tractor (135)
- Room air conditioner (129)
- Hand-held, non-power tools (127)
- Chainsaw (123)
- Leaf blower/vacuum (116)
- Yard trimmer (112)
- Snow blower (110)
- Edge trimmer (108)
- Insecticides (107)



A wide-angle photograph of a rural landscape. A dirt road stretches from the foreground towards the horizon, flanked by green grass on the left and a dark, plowed field on the right. In the distance, a white barn is visible on the horizon. The sky is filled with heavy, dark grey clouds, with a thin layer of lighter clouds and a hint of sunset or sunrise light near the horizon.

NATURAL DISASTERS POSE A HUGE THREAT TO THOSE IN RURAL AREAS

Here are some reasons why...

Products Every Rural Household Needs

Rural areas face challenges in emergency preparedness because they are remote, have a low population density, and have limited resources for immediate access.

Because of this, it is important that all rural households are equipped with the essentials:

- LED lanterns
- Generators
- Shop-vac
- Emergency fuse kit & batteries
- Portable heaters & fans
- Coolers
- Emergency kits

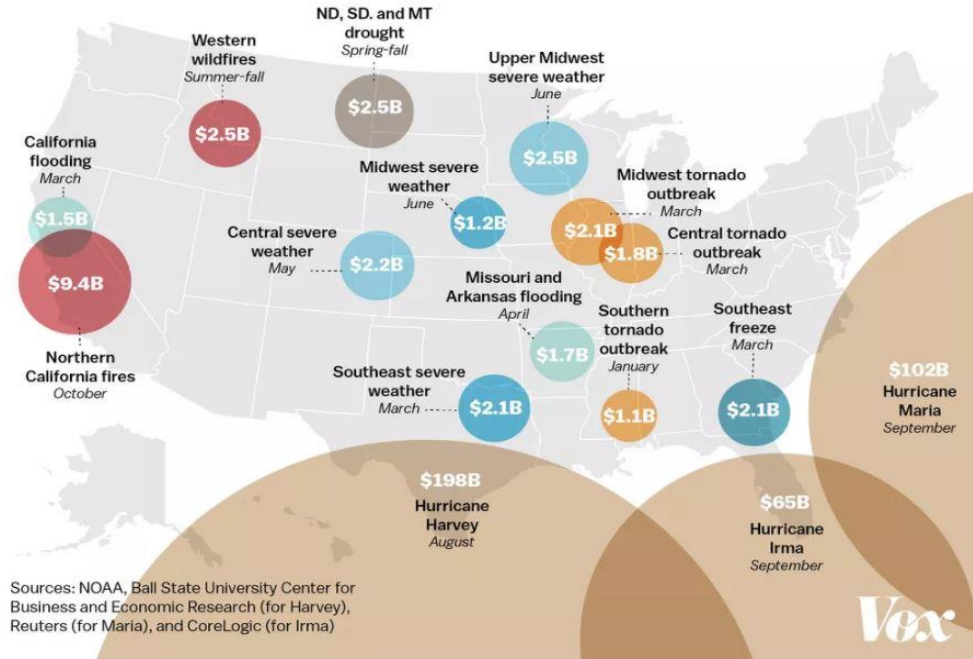


Disasters in Rural Areas

Bad weather is (unfortunately) always in season.

TSWRural can provide the right marketing mix and timing for your business and will get your products in front of your rural target customers when and where they need it most.

Billion-dollar disasters of 2017 in the US



Sources: NOAA, Ball State University Center for Business and Economic Research (for Harvey), Reuters (for Maria), and CoreLogic (for Irma)

A pair of hands, with some dirt on the fingers, are cupped together holding several ripe, red tomatoes with green stems. The background is a soft-focus outdoor setting.

RURAL PARTNERSHIP

C & D county consumers are relatively untapped, very responsive, and key to the bottom line

TSWRural has the resources, expertise, and experience to reach the highly-desirable rural market

Phone: (888) 506-6055

Email: contact@tswrural.com

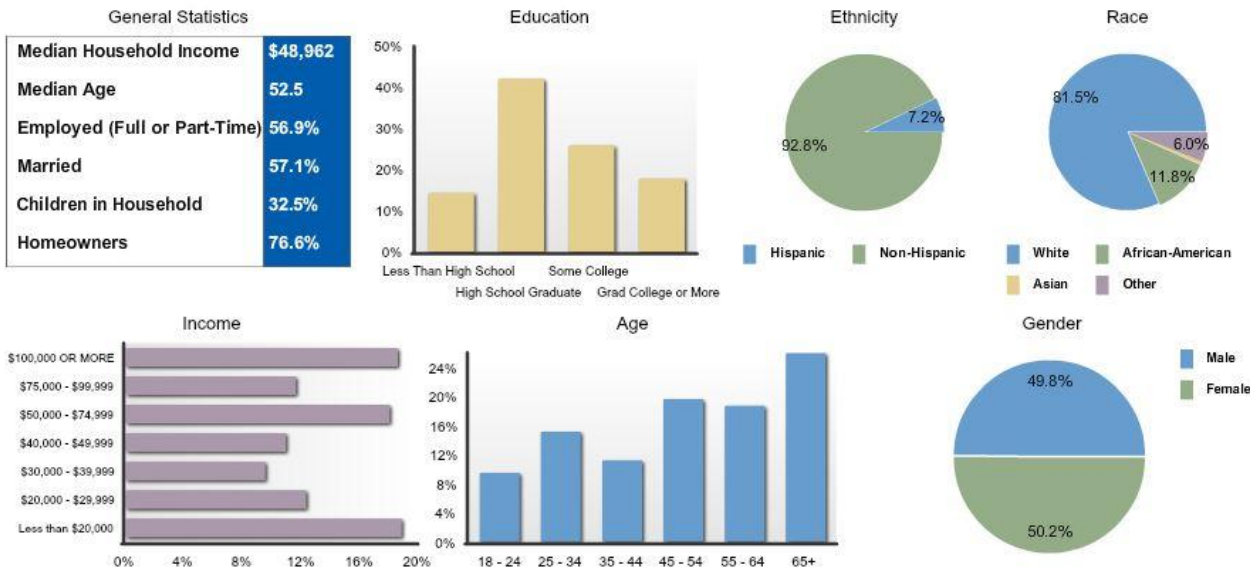
The image features a background of vertical wooden planks with a natural, weathered texture and varying shades of brown. A thin white border is visible around the edges of the image. Centered on the planks is the text "tsw rural" in a large, white, sans-serif font. The text is arranged in two lines: "tsw" on the top line and "rural" on the bottom line.

tsw
rural

Appendix

Demographic Profile

	Sample	Weighted (000)	Percentage
Base: All Adults	14,369	234,786	100%
Target: 'D'	1,227	32,358	13.8%



* Indicates call count from 31 to 60. Projections may be unstable, use with caution
 ** Indicates call count below 31. Projections are likely unstable, use with caution

Source: Simmons Research LLC, Spring 2015 NHCS Adult Study 06-month

Appendix

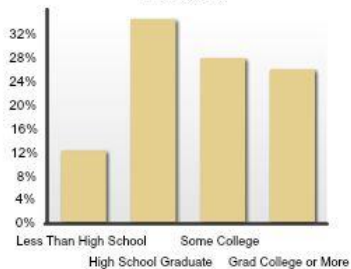
Demographic Profile

	Sample	Weighted (000)	Percentage
Base: All Adults	14,369	234,786	100%
Target: 'C'	1,241	34,397	14.7%

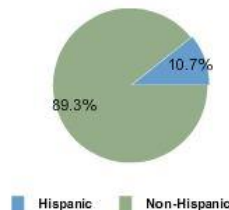
General Statistics

Median Household Income	\$54,954
Median Age	50.1
Employed (Full or Part-Time)	57.6%
Married	51.1%
Children in Household	31.2%
Homeowners	71.6%

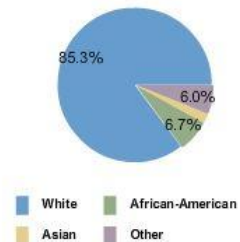
Education



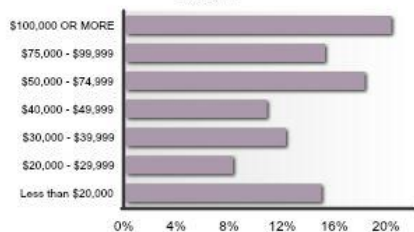
Ethnicity



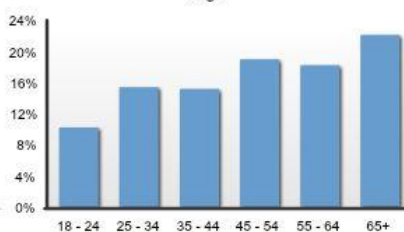
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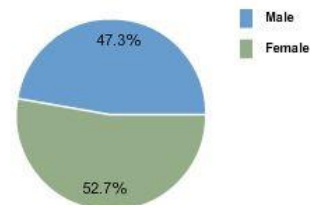
Income



Age



Gender



* Indicates cell count from 31 to 80. Projections may be unstable, use with caution
 ** Indicates cell count below 31. Projections are likely unstable, use with caution

Source: Simmons Research LLC, Spring 2015 NHCS Adult Study 06-month

Appendix

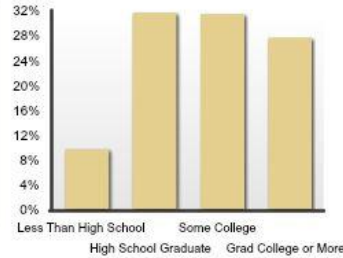
Demographic Profile

	Sample	Weighted (000)	Percentage
Base: All Adults	14,369	234,786	100%
Target: 'B'	3,047	69,228	29.5%

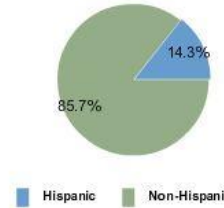
General Statistics

Median Household Income	\$63,031
Median Age	44.1
Employed (Full or Part-Time)	59.1%
Married	54%
Children in Household	36.1%
Homeowners	66.3%

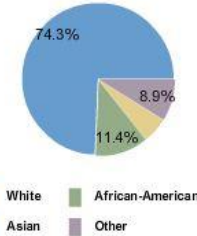
Education



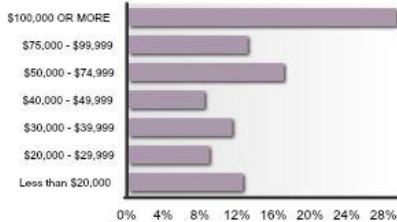
Ethnicity



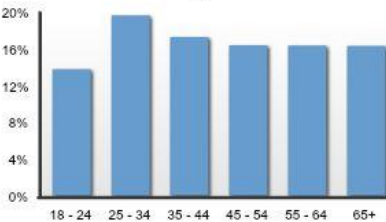
Race



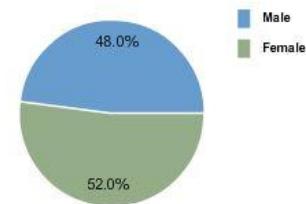
Income



Age



Gender



Source: Simmons Research LLC, Spring 2015 NHCS Adult Study 06-month

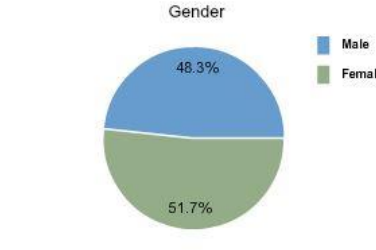
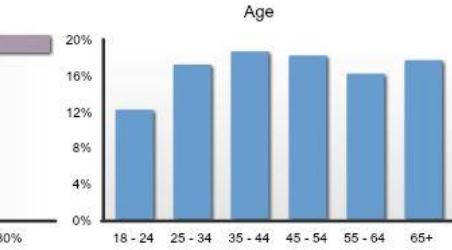
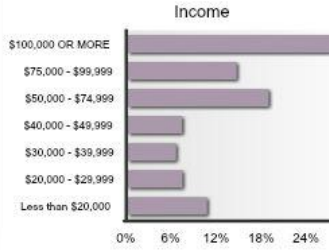
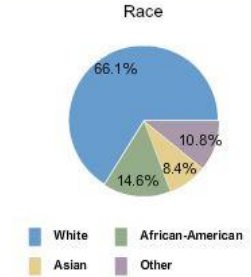
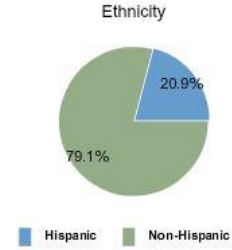
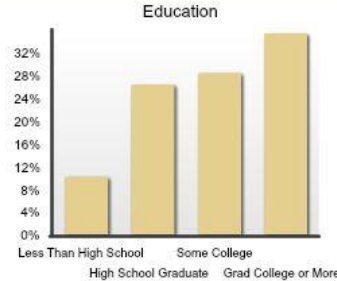
Appendix

Demographic Profile

	Sample	Weighted (000)	Percentage
Base: All Adults	14,369	234,786	100%
Target: 'A'	8,854	98,802	42.1%

General Statistics

Median Household Income	\$75,926
Median Age	45.9
Employed (Full or Part-Time)	62.9%
Married	52.4%
Children in Household	38.4%
Homeowners	65.4%



Source: Simmons Research LLC, Spring 2015 NHCS Adult Study 06-month

Appendix

	MAKE MAJOR HOME IMPROVEMENT	SELL OR CHANGE HOME	MAKE LAST HOME MORTGAGE PAYMENT	MAKE MAJOR HOME IMPROVEMENT - next 12 months	SELL OR CHANGE HOME - next 12 months	MAKE LAST HOME MORTGAGE PAYMENT - next 12 months
D	10.2%	*11.2%	**13.3%	17.6%	*13.4%	**20.2%
	5.9%	*2.8%	**0.9%	9.7%	*4.9%	**2.0%
	74	*81	**96	**127	*97	**146
	0.8%	*0.4%	**0.1%	1.3%	*0.7%	**0.3%
C	17.0%	*17.4%	**10.2%	12.9%	23.7%	**22.0%
	9.3%	*4.2%	**0.7%	6.7%	8.2%	**2.1%
	116	*119	**70	88	162	**150
	1.4%	*0.6%	**0.1%	1.0%	1.2%	**0.3%
B	31.1%	32.9%	*30.4%	28.4%	27.6%	*28.2%
	8.4%	3.9%	*1.0%	7.3%	4.7%	*1.3%
	105	112	*103	96	94	*96
	2.5%	1.2%	*0.3%	2.2%	1.4%	*0.4%
A	41.8%	38.5%	46.1%	41.2%	35.3%	29.6%
	8.0%	3.2%	1.1%	7.5%	4.2%	1.0%
	99	91	110	98	84	70
	3.3%	1.3%	0.4%	3.1%	1.8%	0.4%

Source: Simmons Market Research
 Simmons Market Research | based on National Average which is represented by 100

Appendix

	D	C	B	A
	72	147	211	1,646
	3,405	3,837	8,092	30,022
NORTHEAST	9.5%	12.1%	11.5%	29.8%
	7.5%	8.5%	17.8%	66.2%
	50	64	60	157
	1.4%	1.6%	3.4%	12.6%
	191	128	356	527
	6,064	3,947	11,858	6,047
EAST CENTRAL	17.0%	12.5%	16.8%	6.0%
	21.7%	14.1%	42.5%	21.7%
	145	107	144	51
	2.5%	1.7%	5.0%	2.5%
	268	186	261	868
	6,687	5,679	6,993	17,831
WEST CENTRAL	18.7%	18.0%	9.9%	17.7%
	18.0%	15.3%	18.8%	47.9%
	120	115	64	114
	2.8%	2.4%	2.9%	7.5%
	415	295	1,046	2,185
	15,785	12,202	29,707	21,155
SOUTH	44.1%	38.6%	42.2%	21.0%
	20.0%	15.5%	37.7%	26.8%
	134	117	128	64
	6.6%	5.1%	12.5%	8.9%

	D	C	B	A
	190	206	475	983
	8,942	6,786	21,159	11,182
SOUTH EAST	25.0%	21.5%	30.0%	11.1%
	18.6%	14.1%	44.0%	23.3%
	124	107	149	55
	3.7%	2.8%	8.9%	4.7%
	225	89	571	1,202
	6,843	5,416	8,548	9,973
SOUTH WEST	19.1%	17.1%	12.1%	9.9%
	22.2%	17.6%	27.8%	32.4%
	148	133	94	77
	2.9%	2.3%	3.6%	4.2%
	73	154	393	1,648
	3,813	5,927	13,804	25,614
PACIFIC	10.7%	18.8%	19.6%	25.4%
	7.8%	12.1%	28.1%	52.1%
	52	91	95	123
	1.6%	2.5%	5.8%	10.7%

Appendix

	D	C	B	A
	166	142	373	1,100
	6,778	5,026	11,146	15,641
4 ABOVE AVERAGE - Impulse Shopper	19.0%	15.9%	15.8%	15.5%
	17.6%	13.0%	28.9%	40.5%
	117	98	98	96
	2.8%	2.1%	4.7%	6.6%
	232	177	411	1,130
	8,575	6,436	13,212	18,088
5 FAR ABOVE AVERAGE - Impulse Shopper	24.0%	20.4%	18.8%	18.0%
	18.5%	13.9%	28.5%	39.1%
	124	105	97	93
	3.6%	2.7%	5.5%	7.6%
	302	309	644	1,950
	10,926	11,627	21,642	29,442
3 AVERAGE - Loyalty	30.6%	36.8%	30.7%	29.2%
	14.8%	15.8%	29.4%	40.0%
	99	119	99	95
	4.6%	4.9%	9.1%	12.3%
	186	172	437	1,495
	6,531	6,889	13,387	19,397
5 FAR ABOVE AVERAGE - Loyalty	18.3%	21.8%	19.0%	19.3%
	14.1%	14.9%	29.0%	42.0%
	94	113	98	99
	2.7%	2.9%	5.6%	8.1%

	D	C	B	A
	*42	**25	61	118
	*1,895	**1,165	1,856	1,898
INDOOR FOGGER	*5.3%	**3.7%	2.6%	1.9%
	*27.8%	**17.1%	27.2%	27.9%
	*185	**129	92	66
	*0.8%	**0.5%	0.8%	0.8%
	**27	*33	*45	72
	**1,623	*1,073	*1,028	1,042
CHAIN SAW	**4.5%	*3.4%	*1.5%	1.0%
	**34.0%	**22.5%	*21.6%	21.9%
	**227	*170	*73	52
	**0.7%	*0.5%	*0.4%	0.4%
	**6	**20	**17	*51
	**235	**287	**307	*728
FERTILIZER SPREADER	**0.7%	**0.9%	**0.4%	*0.7%
	**15.1%	**18.4%	**19.7%	*46.8%
	**101	**139	**67	*111
	**0.1%	**0.1%	**0.1%	*0.3%
	**12	**13	**4	**29
	**638	**98	**538	**432
GARDEN TILLER	**1.8%	**0.3%	**0.8%	**0.4%
	**37.4%	**5.8%	**31.5%	**25.3%
	**249	**44	**107	**60
	**0.3%	**0.0%	**0.2%	**0.2%

Appendix

	D	C	B	A
	**5	**8	**6	**20
	**404	**108	**226	**232
GARDEN TRACTOR	**1.1%	**0.3%	**0.3%	**0.2%
	**41.7%	**11.1%	**23.3%	**23.9%
	**278	**84	**79	**57
	**0.2%	**0.0%	**0.1%	**0.1%
	**13	**12	*48	100
	**284	**373	*1,561	950
HANDHELD TOOLS (NON-POWER)	**0.8%	**1.2%	*2.2%	0.9%
	**9.0%	**11.8%	*49.3%	30.0%
	**60	**89	*167	71
	**0.1%	**0.2%	*0.7%	0.4%
	**10	**21	**30	*52
	**835	**465	**478	*1,056
HEDGE TRIMMER	**2.3%	**1.5%	**0.7%	*1.0%
	**29.5%	**16.4%	**16.9%	*37.3%
	**197	**124	**57	*88
	**0.4%	**0.2%	**0.2%	*0.4%
	**21	**15	63	69
	**779	**283	2,685	679
LEAF BLOWER OR VACUUM	**2.2%	**0.9%	3.8%	0.7%
	**17.6%	**6.4%	60.7%	15.3%
	**117	**48	205	36
	**0.3%	**0.1%	1.1%	0.3%

	D	C	B	A
	**0.3%	**0.0%	**0.2%	**0.2%
	**16	**20	**21	*33
	**960	**683	**784	*162
RIDING/TRACTOR-TYPE LAWN MOWER	**2.7%	**2.2%	**1.1%	*0.2%
	**37.1%	**26.4%	**30.3%	*6.2%
	**247	**199	**102	*15
	**0.4%	**0.3%	**0.3%	*0.1%
	*32	**9	*59	80
	*1,112	**159	*1,732	1,343
OTHER POWER MOWER (WALK BEHIND)	*3.1%	**0.5%	*2.5%	1.3%
	*25.6%	**3.7%	*39.8%	30.9%
	*171	**28	*135	73
	*0.5%	**0.1%	*0.7%	0.6%
	**7	**8	**12	*48
	**491	**137	**719	*577
SNOW BLOWER	**1.4%	**0.4%	**1.0%	*0.6%
	**25.5%	**7.1%	**37.4%	*30.0%
	**170	**54	**126	*71
	**0.2%	**0.1%	**0.3%	*0.2%
	**9	**11	*34	*55
	**448	**286	*1,069	*1,078
YARD TRIMMER	**1.3%	**0.9%	*1.5%	*1.1%
	**15.5%	**9.9%	*37.1%	*37.4%
	**104	**75	*126	*89
	**0.2%	**0.1%	*0.4%	*0.5%