

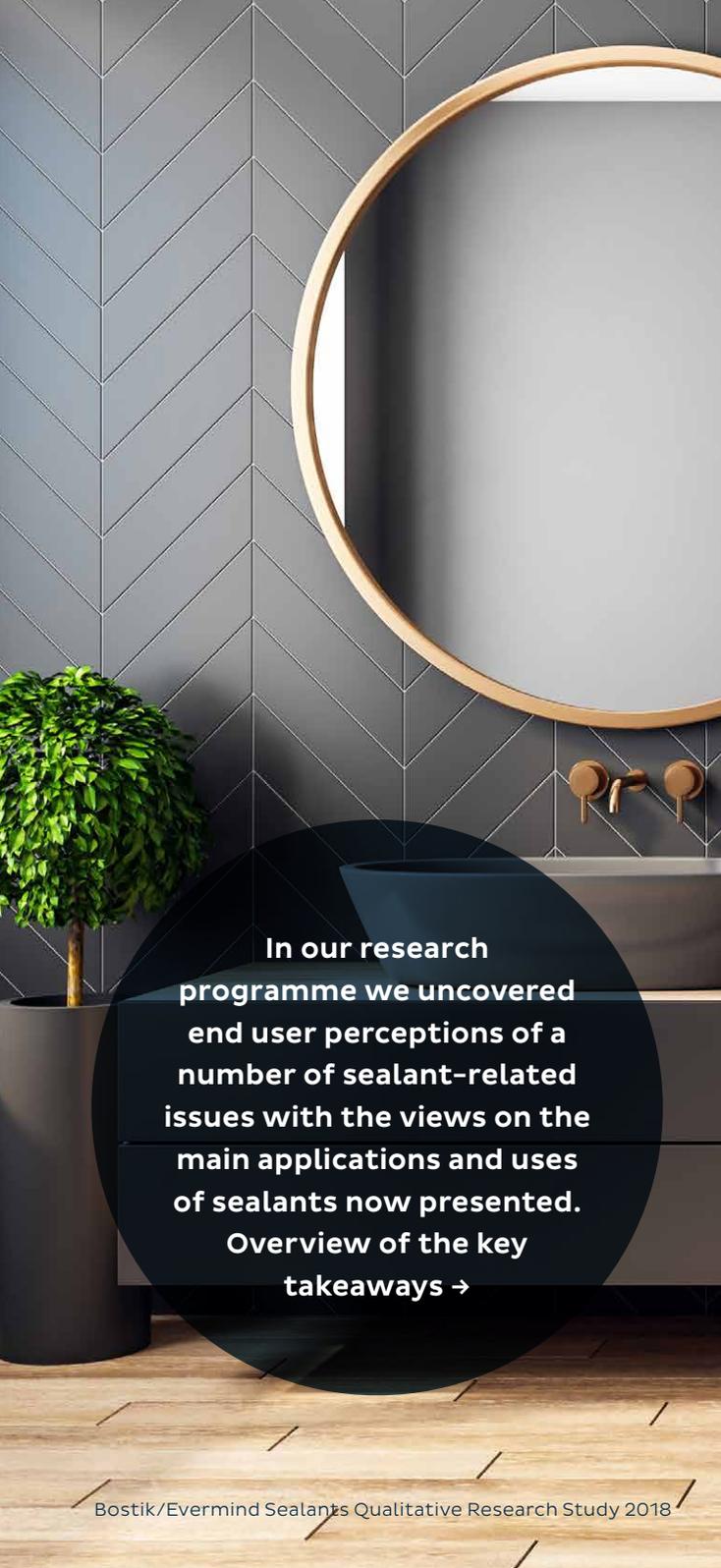
SMART RESEARCH SERIES

What are the main applications & uses of sealants?

ABOUT THE SMART RESEARCH SERIES.

Bostik regularly conducts in-depth assessments of its priority markets using both quantitative and qualitative research methods. As part of this research programme, a qualitative study was conducted between June and September 2018 on the sealants market. With the 'Smart Research Series' we present end user views and perceptions of the category. For further background, check the last page of this document.





In our research programme we uncovered end user perceptions of a number of sealant-related issues with the views on the main applications and uses of sealants now presented. Overview of the key takeaways →

FINDING 1 – HIGHLY DIVERSIFIED RANGE OF NEEDS & APPLICATIONS

A vast array of applications and usage situations are present in the sealant category. When faced with this complex category, end users welcome the structure and sub-classifications to assist decision making and product selection.

FINDING 2 – SANITARY & KITCHEN APPLICATIONS DOMINATE THE SEALING LANDSCAPE

Sanitary and kitchen applications were highlighted as the primary use by both DIY and professional users. Applications include new installations, repair, maintenance and improvement projects.

FINDING 3 – REAPPLICATION IS PREFERRED OVER REPAIR

The research highlighted the preference to completely replacing existing seals over replacing them. This finding appears to contradict the relative popularity of sealant repair products which have been launched in recent years.

FINDING 4 – SEALANTS ARE NOT ONLY USED FOR SEALING

An additional finding was the other uses of sealants in everyday repair, maintenance and improvement projects. Three other uses of sealants were identified: filling, bonding and aesthetics.



This paper presents an overview of the main applications and uses of sealants as identified in the study. For copies of additional publications in the series or a detailed overview of the research findings, please contact your local Bostik sales representative or info@bostik.com.

What are the main applications & uses of sealants?

How do users perceive sealant packaging?

What are user buying habits & channel preferences in the sealant category?

What are user pain points when using sealants?





INDEPTH RESEARCH FINDINGS

FINDING 1 HIGHLY DIVERSIFIED RANGE OF NEEDS & APPLICATIONS

The first theme to emerge from the findings was the vast array of applications and usage situations in the sealant category. The most common uses were sealing projects in areas such as bathrooms and kitchens. A comprehensive list of practices covering both indoor and outdoor applications was also generated. This list covered a variety of tasks including floor installation finishing, door and window frames, tile finishing and aquariums, as well as roofs, terraces, motor homes, caravans and boats.

When faced with a potentially complex category, users appear to welcome the structure and sub-classifications provided by sealant manufacturers. This as part of their offerings in order to assist decision making and product selection. When accompanied by additional packaging aids including imagery, colour coding and indications of features and benefits, end user choice can be highly simplified.

There are mixed perceptions of sealants which are classified as All Purpose. There was some scepticism with questions raised about whether their performance could match that of a sealant marketed for a defined purpose. Manufacturers and retailers should be aware of different perceptions and requirements among end users.

FINDING 2

SANITARY & KITCHEN APPLICATIONS DOMINATE THE SEALING LANDSCAPE



Sanitary and kitchen applications were highlighted as the primary use by both DIY and professional users. With water tightness the main requirement, the research participants highlighted common areas of application as around sinks, basins, countertops, showers, baths and wetrooms.

Relevant applications include both new installations as well as repair, maintenance and improvement projects. The application of sealants after the installation of new sanitary fittings (e.g. sinks, showers and baths) was regarded as mandatory. Participants also highlighted the requirement for seals to be replaced over time. This, due to wear and tear and the appearance of mould and imperfections. While the perceived life of a sealant varied between countries, a common finding was that they have a finite life, regardless of the brand, product or technology used.



FINDING 3

REAPPLICATION IS PREFERRED OVER REPAIR



Despite a number of offerings to repair or renew existing seals, the research highlighted an overwhelming preference to completely replace existing seals rather than repair them.

The respondents regularly indicated a certain level of mistrust in repairing existing seals with questions raised over both the water or air tightness and final finish of the repaired seal. This finding appears to contradict the relative popularity of sealant repair products which have been launched in recent years.

The apparent contradiction could potentially be explained by preferences among novice sealant users and practices in the residential rental market. In these cases, it has been suggested that inexperienced users may be more open to repair a sealant joint while residents in rental accommodation may have a more risk averse attitude. In such cases, a higher priority may be placed on having a clean and mould-free finish rather than water or air tightness.



FINDING 4

SEALANTS ARE NOT ONLY USED FOR SEALING



An additional finding to emerge was the other uses of sealants in everyday repair, maintenance and improvement projects. In addition to the primary sealing function, a number of other uses of sealants were identified:



FILLING

The gap or crack filling properties of some sealant formulations emerged as a common additional use. It is clear that all types of sealants are used for filling-oriented tasks.

Common usage included filling holes, repairing cracks as well as filling unsightly gaps around the home including door architraves and frames, plinths and skirting boards.



BONDING

The adhesive properties of sealants were also recognised by users, though more prevalent among professional users who have greater experience of the products and formulation types.

Most sealants have highly adhesive properties. These capabilities, particularly in silicone or silyl modified polymer formulations, appear to be recognised among users. With sealants often used to bond common elements, eliminating the requirement for drilling and mechanical fixings. While this application emerged from the research, it should be noted that sealant manufacturers commonly advise against this.



AESTHETICS

The role of sealants to deliver aesthetic finishes was an additional theme to emerge from the research. There are many instances where the primary requirement is masking imperfections and delivering a high quality appearance.

While the properties of sealants enable them to easily fill gaps for a seamless appearance around recently installed items such as worktops, counters and carpentry, the range of colours now available can further improve aesthetics and final finishes.



CONCLUSION

The research indicates that the comprehensive ranges delivered by manufacturers are being driven by the diversity of sealing needs in the market. To minimise the potential for confusion, product identification and selections through clear packaging and shelf layouts is essential.

The dominant use of sealants remains in sanitary and kitchen applications. The primary objective is to ensure water tightness and eliminate the potential for future damage around fittings. The research also highlighted a strong potential market for the replacement and rejuvenation of seals over time.

There is a clear preference for replacement over repair. The study also highlighted a number of alternative uses beyond that of sealing: filling, bonding and achieving high quality and aesthetically attractive finishes.

MARKET RESEARCH OVERVIEW

The research included fieldwork in France, Germany and the United Kingdom which was conducted by an external research firm. Both focus groups and face-to-face interviews were used as the primary research methods.

Focus groups

Two focus group sessions with seven to eight participants were conducted in each country with each lasting approximately two and a half hours. Pre-qualification of invitees was done in advance to ensure diversity in age, gender and sealant experience. All participants were homeowners.

The groups were divided according to level of experience with one group classed as Novice/Occasional Users and the other as Occasional/Regular Users. Novice/Occasional users were those who had used one product from the sealant category on one or two occasions over the previous 12 months. Occasional/Regular users were identified as those who had used at least two sealant products four to five times over the previous 18 month period.

Face-to-face interviews

Four face-to-face interviews were also conducted in each of the three markets. These were reserved for professional users of sealants with each interview lasting between 45-60 minutes.

The interviews covered both professionals in defined trades such as decoration or tiling as well as general contractors who perform a variety of repair and maintenance tasks. All were pre-qualified as regular users of sealants who routinely use multiple types of products from the category.



**SMART HELP:
PLEASE CONTACT YOUR
SALES REPRESENTATIVE.**

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Bostik/Evermind Sealants Qualitative Research Study 2018

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