DIY Retailing - UK - May 2013

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“Retailers such as B&Q and Homebase are established authorities in DIY – and they need to capitalise on this to deliver online advice, knowhow and service that pureplays such as Amazon cannot.”

– John Mercer, European Retail Analyst

In this report we answer the key questions:

- Are there growth categories?
- Why the downsizing?
- Are small stores challenging the big boys?
- How can retailers capture non-core customers?
- What is the role of online?

DIY has been one of the worst-hit retail sectors by the squeeze on incomes and the weak housing market. And poor weather in spring and summer 2012 compounded the sector’s underperformance.

Consequently, from a sector sales peak in 2008, DIY retailers had lost £1.2 billion - or 10.7% of 2008 turnover - in annual sales by 2012. We do not forecast a major recovery for the DIY specialists: much will depend on the timing and strength of economic recovery including a pick-up in housing transactions.

Moreover, the unseasonal early-2013 weather will have dented start-of-season sales for the sector.

In the medium term, we think DIY retailers will be forced to cater to demand which will be less focused on big-ticket goods or traditional DIY. Categories such as gardening, homewares or lighter home-improvement categories are likely to prove more resilient in the near future.

And an ageing population with demand for Do It For Me could boost trade sales – but much of this demand will be channelled to trade specialists.

As ever, the report includes extensive consumer research. This year we asked shoppers about their past activity and future intentions in undertaking DIY; where they had bought in-store and online; satisfaction levels on a number of measures when shopping for DIY including a breakdown of satisfaction for major retailers; their attitudes to DIY and decoration; and their usage of online for browsing and shopping for DIY goods.

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market