

DIY Retailing - Spain - May 2021

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This report looks at the following areas:

- The impact of COVID-19 on consumer behaviour and the DIY retailing market
- How the market will fare post-COVID-19
- The performance of the major retailers in 2020
- DIY shopping behaviours and attitudes to home improvement innovations.

DIY is one of the few sectors which has been relatively insulated from the impact of COVID-19. Consumer spending on DIY products registered double digit growth in 2020 (some 10% we estimate) to reach €9.8 billion (including VAT). This is extremely robust, particularly in the context of the drop of 12% in all spending. With time to spare, and spending in other areas curtailed, it is clear that many people decided to spend money on their homes and gardens.

Our consumer research conducted for this report highlights that almost eight in ten (76%) Spanish people think that doing DIY projects is a good way to fill up time during the outbreak. Our survey also shows that just under nine in ten (87%) Spanish consumers say they value their home more, the highest in Europe.

When it comes to interest in DIY innovations, our consumer research shows there is very strong interest in online tutorials. Some 46% of Spaniards say they would be interested in online DIY tutorials, the second highest in Europe, underlining that despite the growth in interest in DIY/home improvement during 2020, there is a hunger among consumers to receive more advice on how to do different DIY tasks.

DIY is one of the least well developed categories online, but this is changing fast and the ongoing pandemic will accelerate this further. One third of Spaniards (33%) chose Amazon for their DIY/home improvement products purchase when it comes to online shopping.



“As a result of the enforced home confinement for much of the year because of the pandemic, the home sector was one of very few areas to see a strong performance in 2020. Online - as a distribution channel - has seen substantial growth during 2020, accelerating development by several years.”

– Utku Tansel, European Retail Analyst

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The COVID-19 crisis hit Spain's leading DIY specialists to different degrees, with online-only retailers the biggest beneficiaries of the disruption caused to store trading by the pandemic. French-owned ecommerce platform ManoMano advanced sales considerably. Some of the sector's biggest predominantly store-based retailers, in particular Leroy Merlin, pivoted quickly to digital selling at the onset of the pandemic and they were able to partially offset store sales losses and generally fared better than the smaller leading players, some of which (for example, Bricoking) delayed launching ecommerce until much later on in the crisis. Our consumer research found that more than half (55%) of adults had shopped at market leader Leroy Merlin in-store and 22% online over the last year.

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