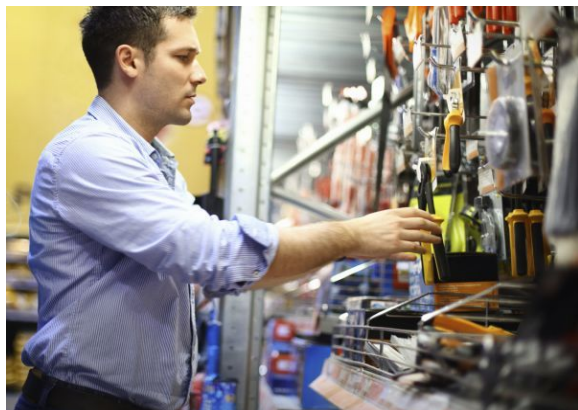


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"The outlook for the DIY market is tough. We think that the recent strength in the sector – spending rose by 10% in 2014 to £14.2 billion and should grow by another 7.5% in 2015 – is catch-up spending after the recession. In the longer term the combined impact of an ageing population and the trend towards living in inner cities will hit DIY demand and push some of it towards tradesmen, who are more likely to use builders' merchants."

This report looks at the following areas:

- Structural changes are having a profound effect on the market
- A re-evaluation of the superstore?
- Have we seen the recovery or is there more to come?

These demographic changes will in turn lead to structural changes for DIY retailing. The long term, slow decline of the superstores will continue as consumers find that their more limited requirements for DIY goods can be satisfied by high street based retailers, whether specialists like Robert Dyas, or generalists like Wilko.

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## Table of Contents

### Overview

Areas covered in this report

### Executive Summary

Positive growth in the specialist market in 2014 – but the leaders continue to underperform

Figure 1: Total DIY/hardware specialists' sector size (incl. VAT), 2009-19

Consumer spending on DIY posts double-digit growth in 2014

Figure 2: DIY products market size breakdown, 2014

Market shares – The leaders lose out

Figure 3: Leading DIY retailers' market shares, 2013/14

Where people shop

Figure 4: Where consumers have bought DIY products in the last year, March 2015

What DIY products they bought

Figure 5: DIY shoppers: What they have bought in the last 12 months, March 2015

Consumer attitudes towards DIY

Figure 6: Attitudes towards DIY stores, March 2015

### Issues and Insights

Structural changes are having a profound effect on the market

The facts

The implications

A re-evaluation of the superstore?

The facts

The implications

Have we seen the recovery or is there more to come?

The facts

The implications

### The Market – What You Need to Know

The housing market improves

Confidence is also on the up

The DIY sector is subject to the elements

Consumer spending strong in 2014

The DIY specialist market: a tale of two sides

The big-box retailers

The smaller trade focused retailers

Looking forward

### Consumer Spending on DIY Products

Mintel market size: Growth expected to continue in 2015

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Figure 7: DIY products – market size (incl. VAT) 2010-15

## Breakdown by category

Figure 8: DIY products market size breakdown, 2014

## Quarterly spending

Figure 9: Quarterly spending on DIY products, 2011-14

## Spending breakdown, 2010-15

Figure 10: Consumer spending on DIY, market segmentation (incl.VAT), 2010-15

## Mintel's market size

## Sector Size and Forecast

### Total DIY specialist sector size

Figure 11: Total DIY/hardware specialists' sector size (incl. VAT), 2009-19

Figure 12: Total DIY/hardware specialists' sector size (incl. VAT), in current and constant prices, 2009-19

### Segmental analysis

#### Sheds continue to underperform

Figure 13: Sales and forecast: DIY 'sheds'/big-box segment (incl. VAT), 2009-19

Figure 14: Sales and forecast: DIY 'sheds'/big-box segment (incl. VAT), in current and constant prices, 2009-19

#### Continued strong grow in the Other DIY and Hardware segment

Figure 15: Sales and forecast: Other DIY/hardware stores segment (incl. VAT), 2009-19

Figure 16: Sales and forecast: Other DIY/hardware stores segment (incl. VAT), 2009-19

### Mintel's forecast methodology

## Market Environment

### Housing transactions hit a high in 2014

Figure 17: Annual % change in the number of completed residential property transactions and retail sales through DIY specialists, monthly, January 2013-February 2015

Figure 18: Number of completed residential transactions per month, January 2008-February 2015

### Renting on the increase

Figure 19: Trends in tenure, percentage of all households, 2009-13

Figure 20: Tenure statistics, by age, 2013

### Confidence turns positive

Figure 21: Consumer confidence levels, January 2013 – April 2015

Figure 22: Annual % change in average weekly earnings versus annual % change in consumer prices, 2009-2015

### Seasonality

Figure 23: DIY specialists sector sales, monthly % change on a year earlier, January 2013-March 2015

### Age demographics: increase in the number of older individuals

Figure 24: Composition of UK population, by age group, 2009, 2014 and 2019

### Inflation in DIY categories

Figure 25: Consumer Prices Index: annual % change, DIY categories, annual, 2010-14

Figure 26: Consumer prices index: annual % change, DIY categories, monthly, March 2014- March 2015

## Key Players – What You Need to Know

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Just three majors left  
A trade and serious DIY format works best at the moment  
B&Q and Homebase both closing stores  
Trade and online also a winning option  
High street where the growth is  
And the market leaders need to follow

## Channels of Distribution

Figure 27: Distribution on spending on DIY products, 2014

Figure 28: Distribution of spending on DIY products, in % and value terms (incl. VAT), 2013 and 2014

## Leading Specialist Retailers

The market leaders continue to underperform

Figure 29: Selected leading specialists, annual % change in sales, 2011-14

Leading specialists' sales

Figure 30: Leading DIY specialists: annual net revenues, 2013-14

Store numbers and annual sales per outlet

Figure 31: Leading DIY specialists: outlet numbers, 2010-14

Figure 32: Leading DIY specialists: annual sales per outlet, 2010-14

Sales area and sales densities

Figure 33: Selected leading DIY specialists: total sales area, 2010-14

Figure 34: Selected leading DIY specialists: annual sales per sq m, 2010-14

Operating profits and margins

Figure 35: Selected leading DIY specialists: operating profits, 2010-14

Figure 36: Selected Leading DIY specialists: operating margins, 2010-14

## Market Shares

The market leaders lose share in 2014

Figure 37: Leading DIY retailers' market shares, 2013/14

Figure 38: Leading DIY generalist and specialist retailers' shares of spending on DIY, 2010-14

Gains for the trade-focused DIY specialists

Figure 39: Leading DIY retailers' share of the total DIY/hardware specialists' sector, 2013 and 2014

Figure 40: Leading DIY specialist retailers' shares of specialists' sector sales, 2012-14

About our market shares

## Leading Non-specialist Retailers

Non-specialist market shares

Figure 41: Leading non-specialist retailers: Estimated shares of spending on DIY, 2014

Figure 42: Leading non-specialist retailers: Estimated shares of spending on DIY, 2012-14

The consumer: Where people shop

Figure 43: Where consumers have bought DIY products in the last year, March 2015

The grocers

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## The leading pureplays

Figure 44: Amazon and eBay DIY SKU data, April, 2014 and 2015

## The mixed-goods discounters

Figure 45: Poundland's new DIY offering 'DIY Time', Poundland Guildford, May 2015

## Online

### Definitions

#### Online sales and market shares in the DIY specialists sector

Figure 46: Online sales by DIY specialists (incl. VAT), 2013-15

Figure 47: Share of online sales by DIY specialists, 2014 (est)

Figure 48: Estimated percentage of sales online, selected major DIY specialists, 2014

#### Online DIY product sales and market shares

Figure 49: Estimated online DIY product sales (incl. VAT), 2013-15

Figure 50: Shares of online DIY sales, by retailer/sub-sector, 2014 (est)

## Space Allocation Summary

### Overview

Figure 51: DIY retailers: Summary of in-store space allocation, April 2015

### Detailed space allocation

#### DIY superstores

#### High street specialists

#### Non-specialists

Figure 52: Detailed space allocation estimates, April 2015

## Retail Product Mix

Figure 53: UK: Leading DIY retailers, estimated sales by product, 2014/15

Figure 54: UK: Leading DIY retailers, estimated sales density by product category, 2014/15

## Who's Innovating?

### In-store and online

#### Innovative PoS technology

#### In-store robotic assistants

#### App for a more inspirational online DIY experience

#### 3D simulator

#### Online real-time estimates for home improvement projects

#### Same-day delivery

#### Cut-price DIY range

#### New store formats

#### Giving tools a second life

## Brand Communication and Promotion

### Advertising spend down 8% in 2014

Figure 55: Total main media advertising spend in the UK DIY retailing sector, 2011-14

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## B&Q leads the pack

Figure 56: Main media advertising spend by leading DIY retailers, 2011-14

## Share of advertising spend

Figure 57: Share of total main media advertising spend in the UK DIY retailing sector, by retailer, 2013-14

## 43% of total DIY retail advertising spend channelled through TV

Figure 58: Main media advertising spend, by media type, 2011-14

Figure 59: Leading DIY retailers main media advertising spend by media type, 2014

## What we have seen in 2015

### Brand Research

#### What you need to know

##### Brand map

Figure 60: Attitudes towards and usage of selected brands, November 2014 and February 2015

##### Key brand metrics

Figure 61: Key metrics for selected brands, November 2014 and February 2015

##### Brand attitudes: Wilko's value is a defining feature

Figure 62: Attitudes, by brand, November 2014 and February 2015

##### Brand personality: B&Q's advertising spend may help drive a more vibrant image

Figure 63: Brand personality – macro image, November 2014 and February 2015

##### Wilko's perception of value comes at the expense of a basic brand image

Figure 64: Brand personality – micro image, November 2014 and February 2015

##### Brand analysis

##### B&Q tends to perform strongly across metrics

Figure 65: User profile of B&Q, February 2015

##### Wilko most likely to be noted for value

Figure 66: User profile of Wilko, November 2014

##### Wickes lacks the penetration of other brands

Figure 67: User profile of Wickes, February 2015

##### Homebase's negative perceptions may contribute towards slipping usage

Figure 68: User profile of Homebase, February 2015

### The Consumer – What You Need to Know

#### Greater competition

#### Move back to the inner cities

#### Younger people prefer the non-specialists

#### Few people buy online and they tend to be younger

#### Homebase fares best in satisfaction, but B&Q rated for service

#### Two thirds of people plan to do some DIY work in the coming year

#### A third of the population hates DIY

### Where They Shopped

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Figure 69: Where consumers have bought DIY products in the last year, March 2015

Figure 70: Number of different DIY retailers or types of DIY retailer used, March 2015

Figure 71: Where consumers have bought DIY products, in-store and online in the last year, March 2015

## Who shops where

Figure 72: Profile of shoppers for DIY goods, March 2015

Figure 73: DIY shoppers – Profile of in-store and online shoppers, March 2015

## Where people mostly shop

Figure 74: In-store DIY buyers – Store used most often, March 2015

Figure 75: Profile of shoppers at stores most frequently used for DIY, March 2015

## The consumer – What they bought

Figure 76: DIY shoppers: What they have bought in the last 12 months, March 2015

Figure 77: Numbers of different types of DIY products bought, March 2015

Figure 78: Purchasers of products by most used DIY store, March 2015

## Satisfaction with DIY Stores

Figure 79: Overall satisfaction with DIY store, March 2015

### Key driver analysis

#### Key drivers

#### Key driver methodology

Figure 80: Key driver analysis of overall satisfaction with DIY in-store retailer shopped at most often, March 2015

Figure 81: Key driver analysis of overall satisfaction with DIY in-store retailers shopped at most often, March 2015

Figure 82: Key driver analysis of overall satisfaction with DIY in-store retailers shopped at most often, March 2015

### Satisfaction and stores used

#### Homebase

Figure 83: Homebase: Satisfaction relative to the average, March 2015

#### B&Q

Figure 84: B&Q: Satisfaction relative to the average, March 2015

#### Wickes

Figure 85: Wickes: Satisfaction relative to the average, March 2015

#### Argos

Figure 86: Argos: Satisfaction relative to the average, March 2015

#### Wilkinson

Figure 87: Wilkinson: Satisfaction relative to the average, March 2015

## Plans for 2015/16

Figure 88: Home improvements planned for the next 12 months, March 2015

Figure 89: Number of people choosing home improvement to spend money left over on, 2009-15

Figure 90: Profile of those planning various DIY projects over next year, March 2015

### Who will do the work?

Figure 91: Home improvement plans and who will do the work, March 2015

Figure 92: Proportion of people planning to use tradesmen for home improvement, by task, March 2015

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Figure 93: Planned DIY work by favourite DIY retailer, March 2015

## Attitudes towards DIY

Figure 94: Attitudes towards DIY stores, March 2015

Figure 95: Profile of holders of attitudes towards DIY, March 2015

Figure 96: Attitudes towards DIY work, by favourite DIY retailer, March 2015

## CHAID Analysis

### Methodology

#### Consumers lacking the skills they need

Figure 97: DIY Retail – CHAID – Tree output, March 2015

Figure 98: DIY Retailing – CHAID – Table output, March 2015

## Clas Ohlson

### What we think

#### International expansion plans

#### Extending 'Club Clas' to Finland

#### Company background

#### Company performance

Figure 99: Clas Ohlson: Group financial performance, 2010/11-2014/15

Figure 100: Clas Ohlson: Outlet data, 2010/11-2014/15

### Retail offering

## Homebase Ltd

### What we think

#### Rethinking the use of space

#### Continued integration of the group

#### Use of technology

#### Company background

#### Company performance

Figure 101: Homebase Ltd: Group financial performance, 2010/11-2014/15

Figure 102: Homebase Ltd: Outlet data, 2010/11-2014/15

### Retail offering

## Kingfisher Group

### What we think

#### One Kingfisher

#### Risky

#### Online

#### Caution

#### Outlook for DIY

#### Where next

#### Company background

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### Company performance

Figure 103: Kingfisher, like-for-like sales growth by country, 2014/15

Figure 104: Kingfisher Group: Group financial performance, 2010/11-2014/15

Figure 105: Kingfisher Group: Outlet data, 2010/11-2014/15

### Retail offering

Figure 106: B&Q (UK) and Castorama (France): sales breakdown, by category, 2014/15

### Wickes/Travis Perkins Retail

#### What we think

Broadening its appeal

Growth in new stores

Market conditions

Company background

#### Company performance

Figure 107: Travis Perkins Retail: Group financial performance, 2010-14

Figure 108: Travis Perkins Retail: Outlet data, 2010-14

### Retail offering

### Appendix – Data Sources and Abbreviations

#### Data sources

Mintel's DIY market size

Specialist sector size

Fan chart forecast

Consumer spending definitions

Financial definitions

Abbreviations

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