

# DIY SOS

Calling DIY to Set-up Online Shop

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# Introduction

2018 was a testing year for DIY retailers as total DIY sales across the UK fell 40% year-on-year, according to the **CBI**.

Delving beneath the surface of the issue it becomes clear that the growth of online marketplaces, which currently Hoover up a **fifth of all retail spending**, now poses a key challenge to the survival of DIY retailers across Europe. Moreover, in countries where Amazon is present, **online consumers are veering towards the marketplace** to make their DIY purchases, over the brand or retailer itself.

In the midst of this rising competition, high street DIY retailers must focus on using the online world to their advantage and start kindling greater loyalty to keep customers coming through their doors and not reverting to the discounts available via budget online marketplaces.

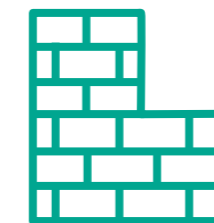
Along this vein, Bazaarvoice commissioned investigative research with 4,200 consumers from the UK, France and Germany to explore the current level of DIY brand awareness across Europe, the factors governing purchase decisions and the chief drivers of enduring customer loyalty.

With more than 60% of UK consumers planning to undertake some form of home maintenance work over the next calendar year, this report looks at what DIY retailers can do to utilise the opportunities of digital technology, in order to stand ahead of competitors as the brand of choice.

## Key questions this report answers:



What are the key opportunities for DIY retailers in 2019?



What are the core barriers for consumers across Europe when it comes to undertaking DIY projects?



How can DIY retailers build and establish long-term trust with consumers?

# Jumpstarting the consumer-retailer relationship

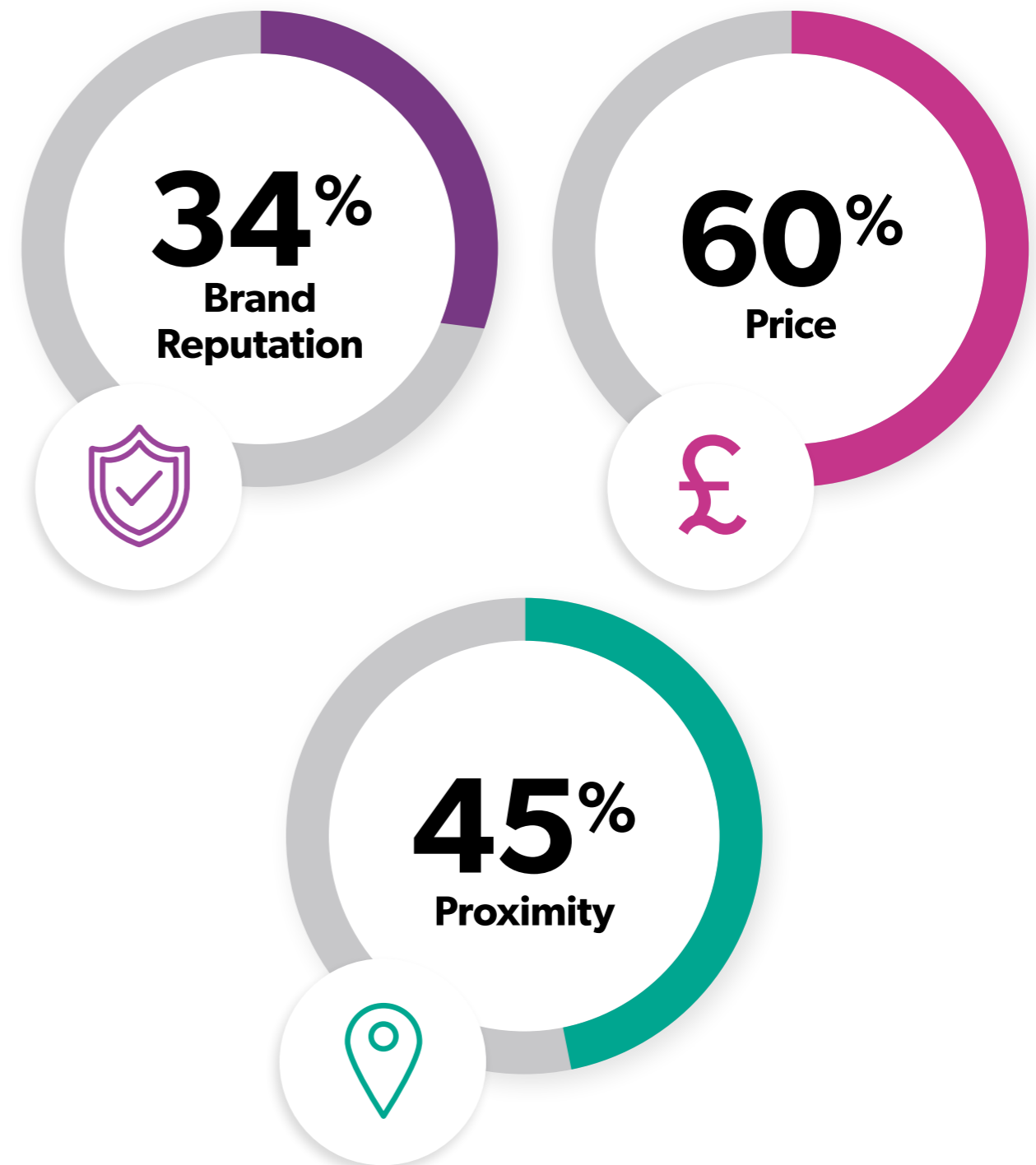
Research from Bazaarvoice identifies a gap in loyalty within the DIY sector. Of the 15 leading hardware and DIY stores in the UK – just six were successfully recognised by more than 10% of consumers, with B&Q identified as the most well-known (81%), closely followed by Homebase (74%).

**Currently, just one third (34%) of UK consumers state brand reputation is a factor in their choice of DIY merchant.** Instead, UK consumers' purchasing decisions are overwhelmingly influenced by price (60%) and proximity (45%) to physical stores.

The situation is even more extreme in Europe. In France, **71% of consumers choose their DIY brand based on price, and in Germany, brand reputation determines purchases for just 19% of consumers, whereas 61% will choose a brand based on physical proximity to them.**

Joe Rohrllich, Chief Revenue Officer, Bazaarvoice, comments "It becomes clear that much like the wider retail landscape, operators have yet to diversify the experience they offer customers in-store, beyond what they can take from shopping online. It's an approach that can't succeed, as online operators simply don't carry the same overheads. It's therefore crucial that DIY retailers lean in to the online world and start to learn how they can create experiences that capture loyalty."

Factors affecting UK consumers in their choice of DIY merchant

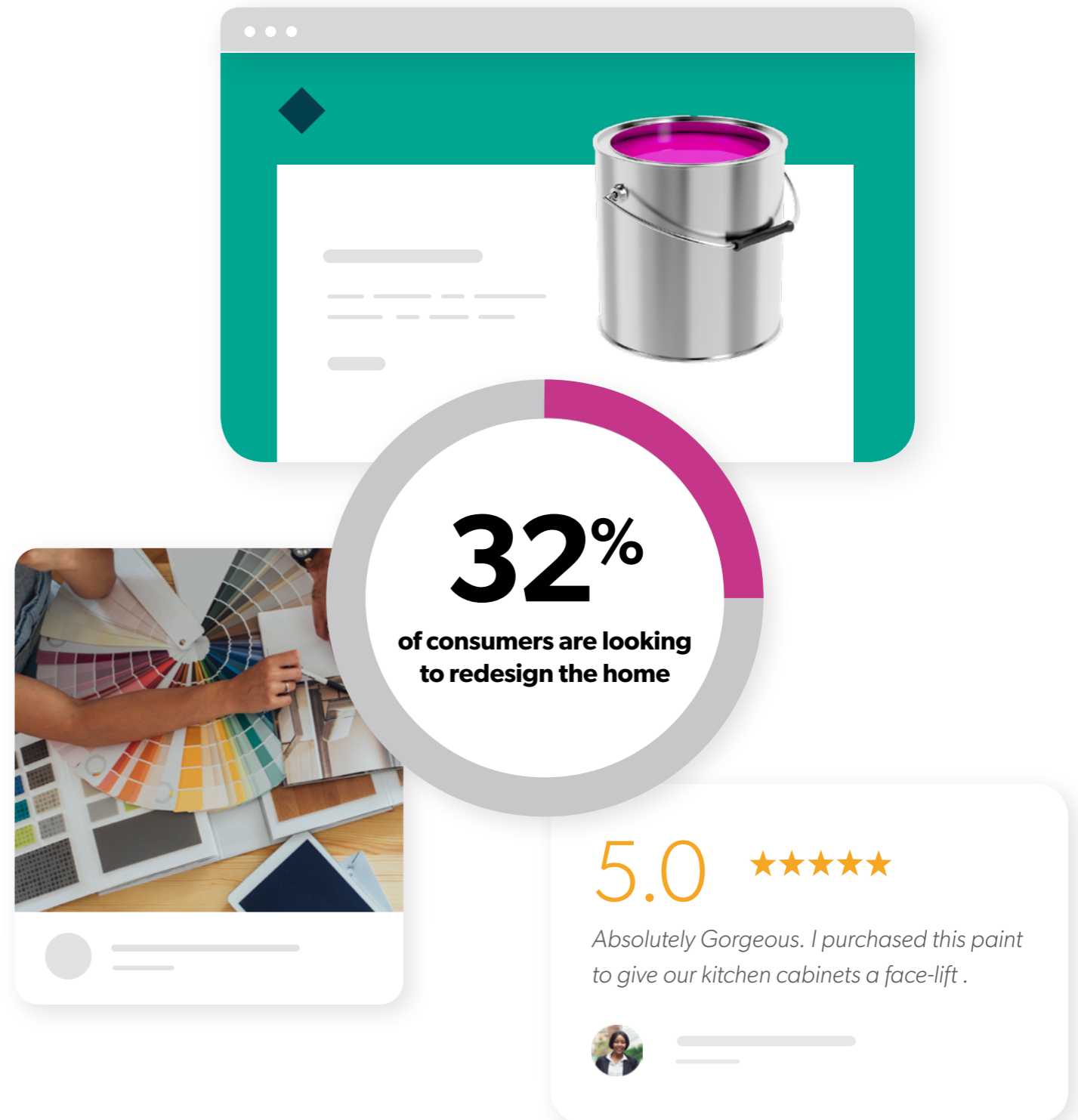


# DI – why?

There's a real opportunity to engage with DIY savvy European audiences. In France for instance, **32% of consumers are looking to redesign the home**. In the UK, consumers are putting plans in place to carry out a variety of DIY projects through 2019 – from decorative interior work (60%) to larger projects such as redesigning a room (39%).

The research also casts light on how the current relationship between DIY brands and consumers impacts people's confidence in taking on projects.

However, a number of barriers stand in the way of European consumers.



## 1) THE MONETARY BARRIER

Correlating with the low spending figures published by the CBI, **lack of money is a core barrier for 52% of European consumers wanting to carry out projects.**

41% of consumers in France will part with in excess of 500€ over the next year purely on DIY products and equipment alone. Similarly, 36% of UK consumers plan on spending over £500. Across Europe, spending has risen 31% on average year-on-year.

## 2) THE EXPERIENCE BARRIER

Another key barrier is experience. While **two thirds (66%) of UK consumers stated that they'd be comfortable with simple household maintenance** such as changing a light bulb and painting rooms in the house, confidence drops to 46% when it comes to larger projects, such as drilling to fit new fixtures.

In fact, **33% of UK consumers admit they lack the know-how to carry out their projects** – this is more acute than in other countries across Europe – 29% in France and 25% in Germany. Consequently, Brits are seeking help from third parties, with 44% turning to friends for advice.



*Consumer uncertainty around DIY projects is much the same as it has always been, what has radically changed is the means by which DIY-ers can seek out advice. The internet is a melting pot of information, opinions and shared experiences, with plenty of systems to ensure the most accurate information is put in front of the consumer. While DIY brands are yet to capitalise fully on the potential of acting as first-movers for this content, the first-movers will quickly drive a transformation in the industry.*

**Joe Rohrich**  
Chief Revenue Officer,  
Bazaarvoice

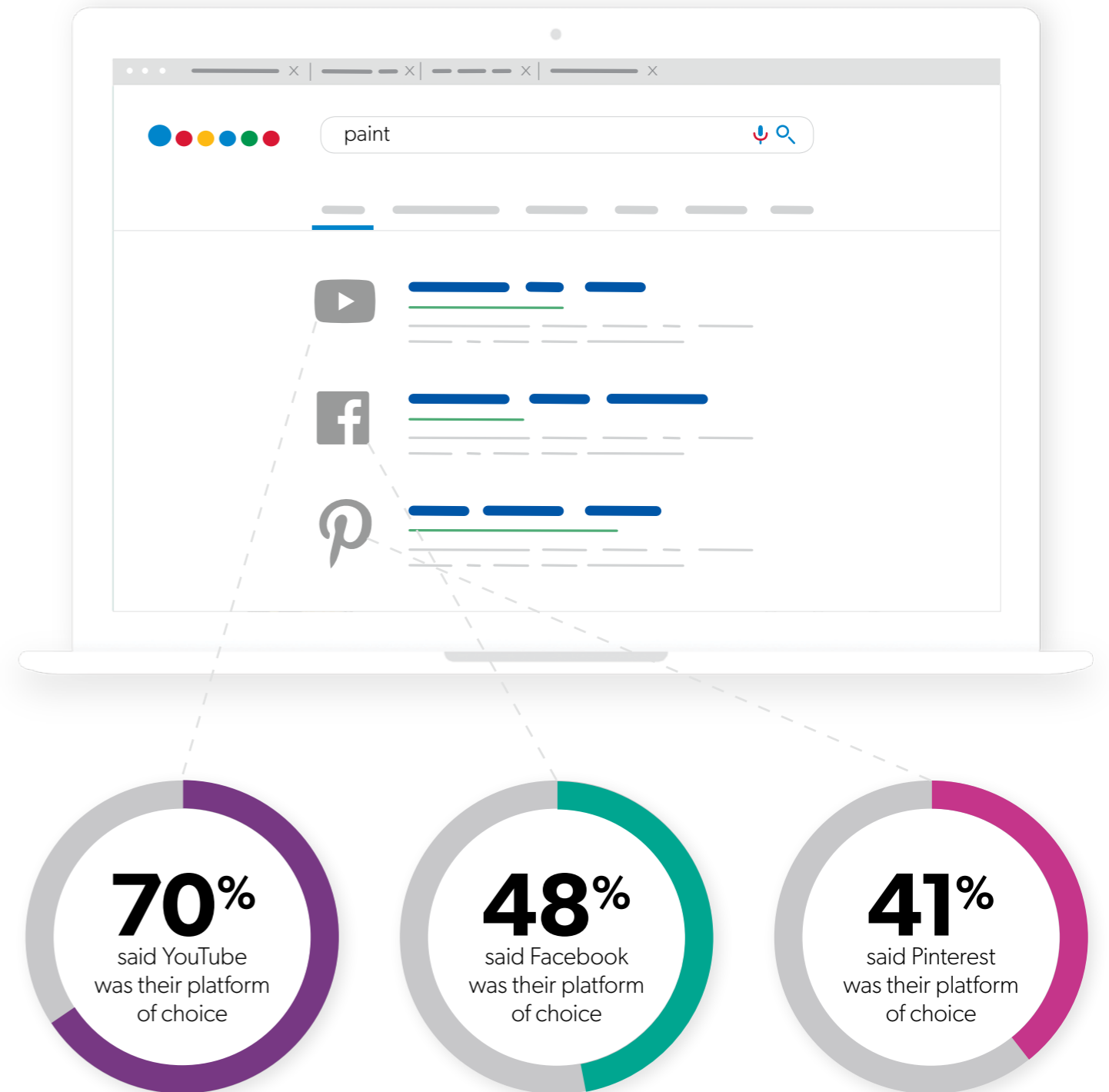
# The digital opportunity for DIY retailers

**37% of consumers are turning to the internet to shop for DIY products.** To aid their purchasing decisions, **consumers are turning to social media content (23%) and online product descriptions (29%).** The visual element of online is the deciding factor for 83% of European consumers, who said video and imagery was crucial when making DIY purchases.

Moreover, **7 in 10 said YouTube was their platform of choice** when searching for inspiration, followed by Facebook (48%) and Pinterest (41%).

The affinity with online platforms doesn't end once the purchase has been made; 37% of consumers look to YouTube for support when carrying out the project itself – this rises to 46% in Germany. Moreover, 44% of British consumers will call on peers for help, with almost a third (31%) heading to the DIY retailer website.

“Online is increasingly becoming an important tool to help shape not only DIY purchasing decisions, but the lifetime value of consumers” explains Joe Rohrlisch, Chief Revenue Officer, Bazaarvoice. “Retailers need to consider the opportunity to provide online after-sales resources for those consumers on the hunt for support in the form of best practice and expertise. Providing this added layer of insight may prove a crucial step for brands, securing consumer trust in a bid to win loyalty.”



# Building trust

This tells us that enabling consumers to access the opinions and experiences of others online is a vital part of enabling successful projects and thereby trust.

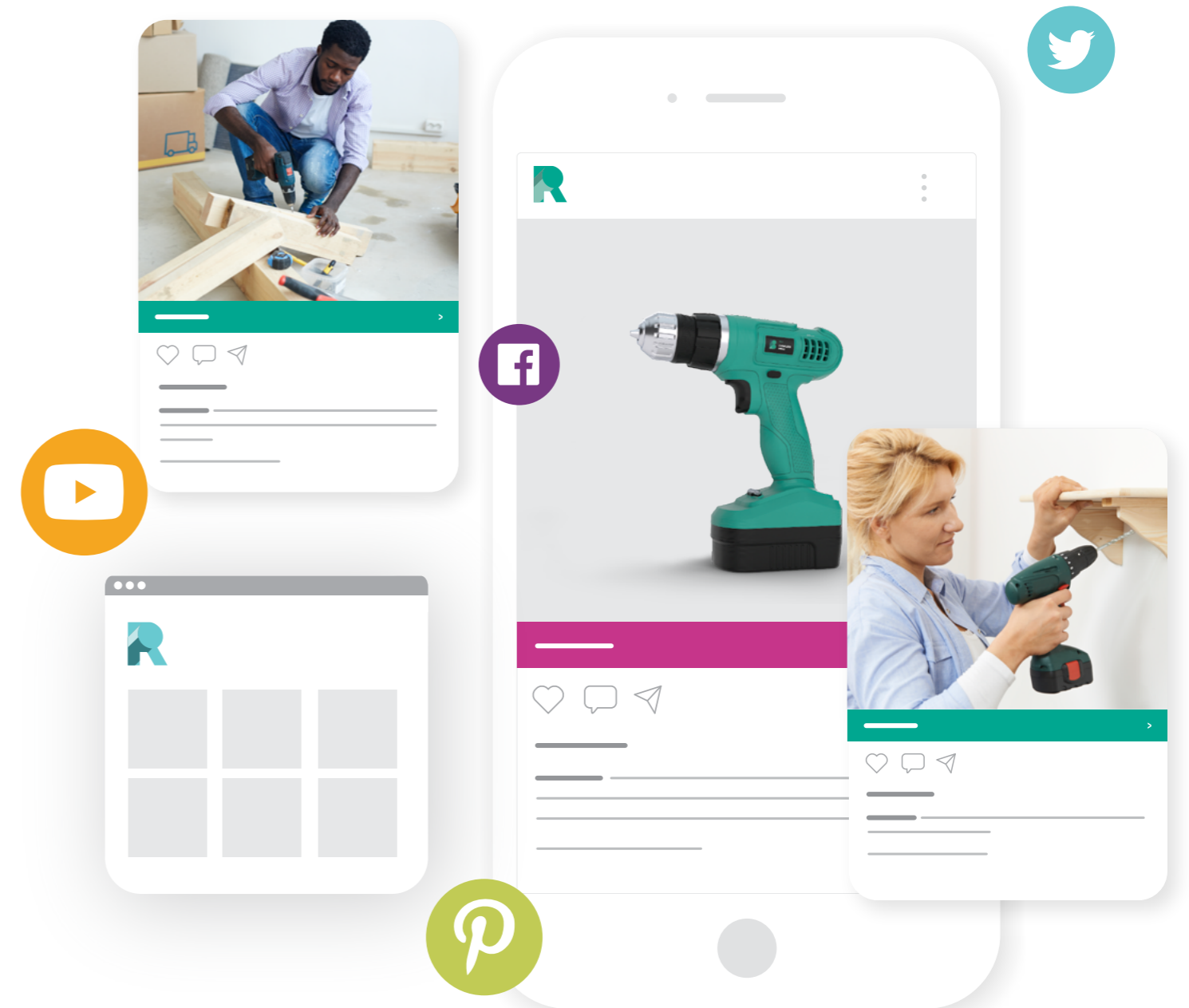
**41% of UK consumers turn to recommendations from a friend before making a purchase. 30% turn to ratings and reviews** on products and a quarter like to have recommendations from a trade professional. Getting all of this content online and accessible is vital in today's customer journeys.

The level of detail in a review is crucial across all markets (64%). This is because building trust in products is primarily achieved through accuracy around features and functions, according to four in five consumers (79%) – this even takes precedence over the brand reputation (60%).

In fact, the detail of review content is almost twice as important as whether the person that left the review was a DIY expert or tradesman (36%).

“The findings not only attest to the power of online customer content, but reinforce the reliance that consumers have on these third-party endorsements in equipping them with valuable information to inform decisions”, Joe Rohrlich explains.

“Attesting to this, our most recent **Shopper Experience Index** found that best-in-class Bazaarvoice DIY clients reported a **128% conversion lift for shoppers who interacted with any type of customer content.**”





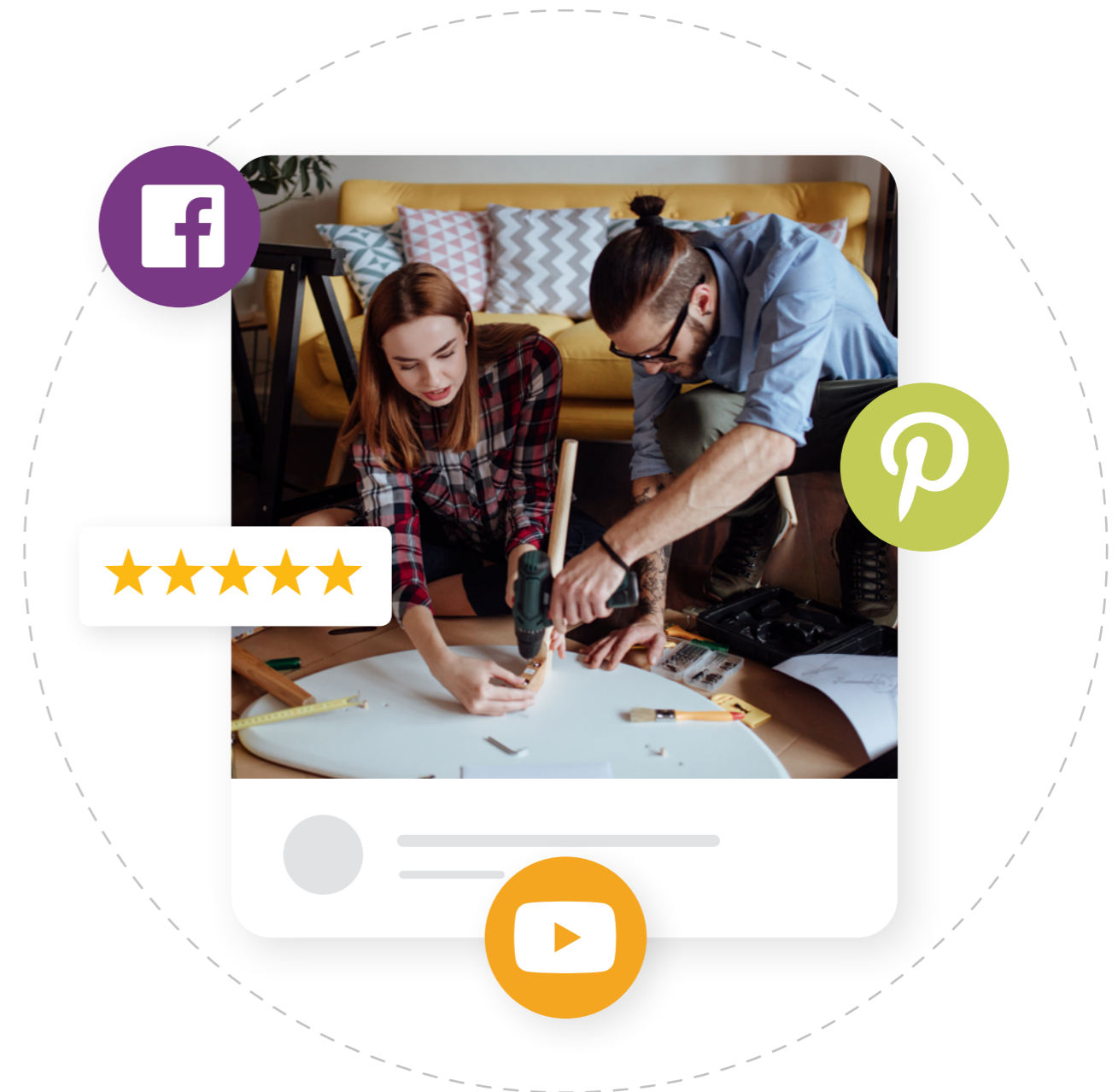
# Conclusion

While the high street has had to bear the brunt of dwindling in-store DIY sales, forward-looking retailers must see this as an indicator of overdue change. The opportunity for hardware brands is glued firmly to experience, elevating the importance of trusted brand relationships by offering customers the guidance they need from product research, through to project execution.

Serving customers the content they need at the right point in their journey means going online. From suggesting paintbrushes and wood varnishes, through to the best techniques for application, it's about making sure that the right content is accessible to help DIY-ers make the most of their purchases.

Importantly, while there is a prominent demand for social media content, the appetite for third party endorsement is steadfast. Consumers need to know what their fellow shoppers are saying so that they can buy with confidence. Consumers value detailed product reviews and accurate information to help inform their purchasing decisions.

Through helpful and engaging content, early movers will have the chance to harness this content to guide return purchase decisions and close the loop on their share of the market. It's a virtuous cycle, as more online business informs understanding of the audiences and price points that offer the highest returns. Getting these elements right sets the foundation of greater customer loyalty and a framework for a more resilient business.



# About Bazaarvoice

Bazaarvoice connects brands and retailers to consumers, so that every shopping experience feels personal. From search and discovery to purchase and advocacy, Bazaarvoice's solutions reach in-market shoppers, personalise their experiences, and give them the confidence to buy. Each month in the Bazaarvoice Network, more than one billion consumers view and share authentic content including reviews, questions and answers, and social photos across 6,000 brand and retail websites. Across the network, Bazaarvoice captures billions of shopper signals monthly — data that powers high-efficiency digital advertising and personalisation with unmatched relevance.

Founded in 2005, Bazaarvoice is headquartered in Austin, Texas with offices in North America, Europe, and Australia. For more information, visit [www.bazaarvoice.com/uk](http://www.bazaarvoice.com/uk).



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