

# COVID-19 and the GB DIY Market

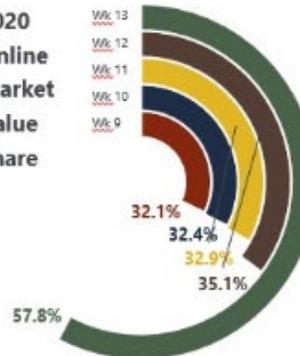


Market declines as store closures offset strong online growth

Total DIY/Home 2020 Value % Change (YoY)



2020 Online Market Value Share



March 2020 Timeline

	S	M	T	W	T	F	S
Wk 11	8th						14th
Wk 12	15th	Stay Home Advisory				Public Shut Down	21st
Wk 13	22nd	Lock Down	Stores Closed				28th

GfK's week 13 period includes 2 days before stores closed

Wk 13 2020 Value % Change (YoY)

	Garden Seasonal	Plants, Seeds and Bulbs	Building Materials	Total Paint	Tools and Equipment
Leaderpanel	-53%	-63%	-12%	+17%	-40%
Online	+95%	+96%	+222%	+514%	+20%

The trend change from week 12 to week 13 is a classic showing of supply and demand. In week 12, the anticipation of a lockdown spurred on home improvement, with all major categories growing YoY. Subsequently, store closures meant that bricks and mortar could no longer satisfy pent up demand. The growth of online has accelerated, but this isn't proving enough to make up for lost in-store sales currently.

The paint category is the only major sector still in growth in week 13. This is likely due to the 2 days of stores being open in week 13 having strong sales. Sales in March last year were also worse than average, supporting a return to more normal performance in 2020.

The -53% YoY value decline of garden leaderpanel is likely understated, as the leaderpanel doesn't include the garden centre independents. This is a valuable channel that has closed its stores, with limited online presence.

In the short term, expect week 14 to perform worse than week 13, being the first full week of closed stores. In the medium term, online should start to improve as many key retailers start to widen their online offering, particularly in paint and garden care.

GfK GB PoS Data. All figures in value. Sourced from the DIY Total Store Report (DTSR) Category leaderpanel data. Wk 7 2019 (10/02/19-16/02/19), Wk 8 2019 (17/02/19-23/02/19), Wk 9 2019 (24/02/19-02/03/19), Wk 10 2019 (03/03/19-09/03/19), Wk 11 2019 (10/03/19-16/03/19), Wk 12 2019 (17/03/19-23/03/19), Wk 13 2019 (24/03/19-30/03/19), Wk 7 2020 (09/02/20-15/02/20), Wk 8 2020 (16/02/20-22/02/20), Wk 9 2020 (23/02/20-29/02/20), Wk 10 2020 (01/03/20-07/03/20), Wk 11 2020 (08/03/20-14/03/20), Wk 12 2020 (15/03/20-21/03/20), Wk 13 2020 (22/03/20-28/03/20).

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