



**NRHA**

North American Retail  
Hardware Association



# THE REBIRTH OF D-I-Y?

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**HARDWARE**  
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# Conventional Wisdom

- An aging population will be less apt to perform D-I-Y projects, opting to BIY.
- The younger generation hasn't developed the skills or taste for DIY.
- The mass merchants and big boxes have trained customers to expect less service.
- Time was more valuable than cost savings to today's consumer.

**D-I-Y Activity Will Decline in the Future!**




# A New Reality

- Housing market swirled down the bowl.
- Unemployment at highest levels in decades.
- Individuals postponing retirement.
- Access to consumer credit drying up.
- Consumers staying put (if they can).
- Consumers now have time, no money.

**Do All these Factors Translate to the  
Rebirth of DIY?**



# Let's Find Out

- NRHA & Hardware Retailing magazine.
  - Fielded a survey of more than 1,500 consumers.
  - Asked them about current D-I-Y habits and their plans for the future.
  - Asked them about their D-I-Y motivations.
  - Asked where they turn for products and advice.
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# What We Discovered

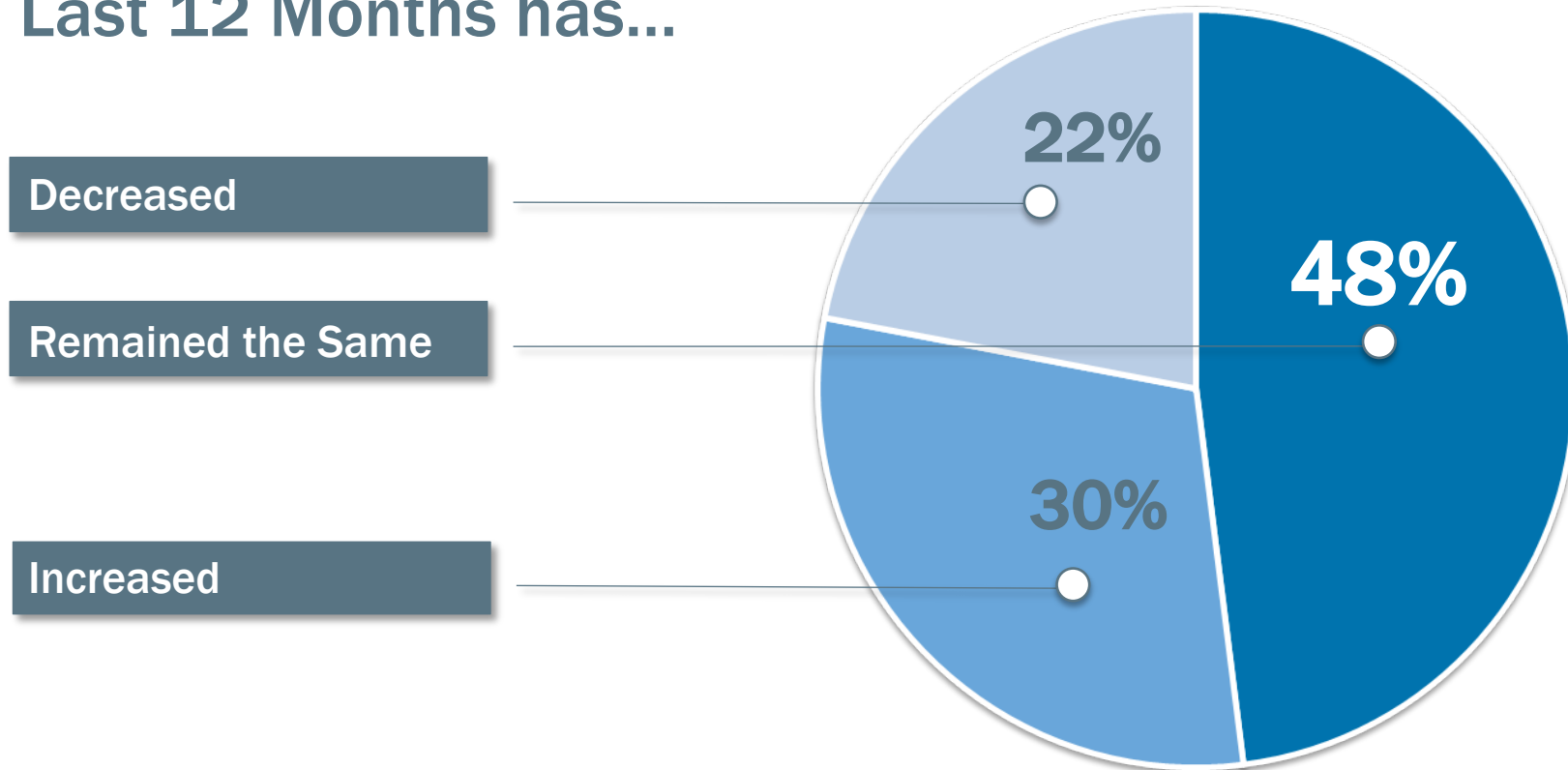
- Consumers are still engaging in D-I-Y activity.
- Consumers plan to engage in slightly more activity in the future.
- Major changes in motivation.
- Major changes in consumer makeup.
- Gradual shift in sources for products and advice.

**Reports of the Death of DIY  
May Have Been a Bit Premature!**



# Where We Stand

Percent of Consumers Saying D-I-Y Activity in the Last 12 Months has...



Source: 2010 NRHA / Hardware Retailing Consumer Study

# What We Discovered

**76%**

Of our respondents had personally tackled a home improvement project within the last year.

**89%**

Of these individuals say they complete between one and six D-I-Y projects each year.

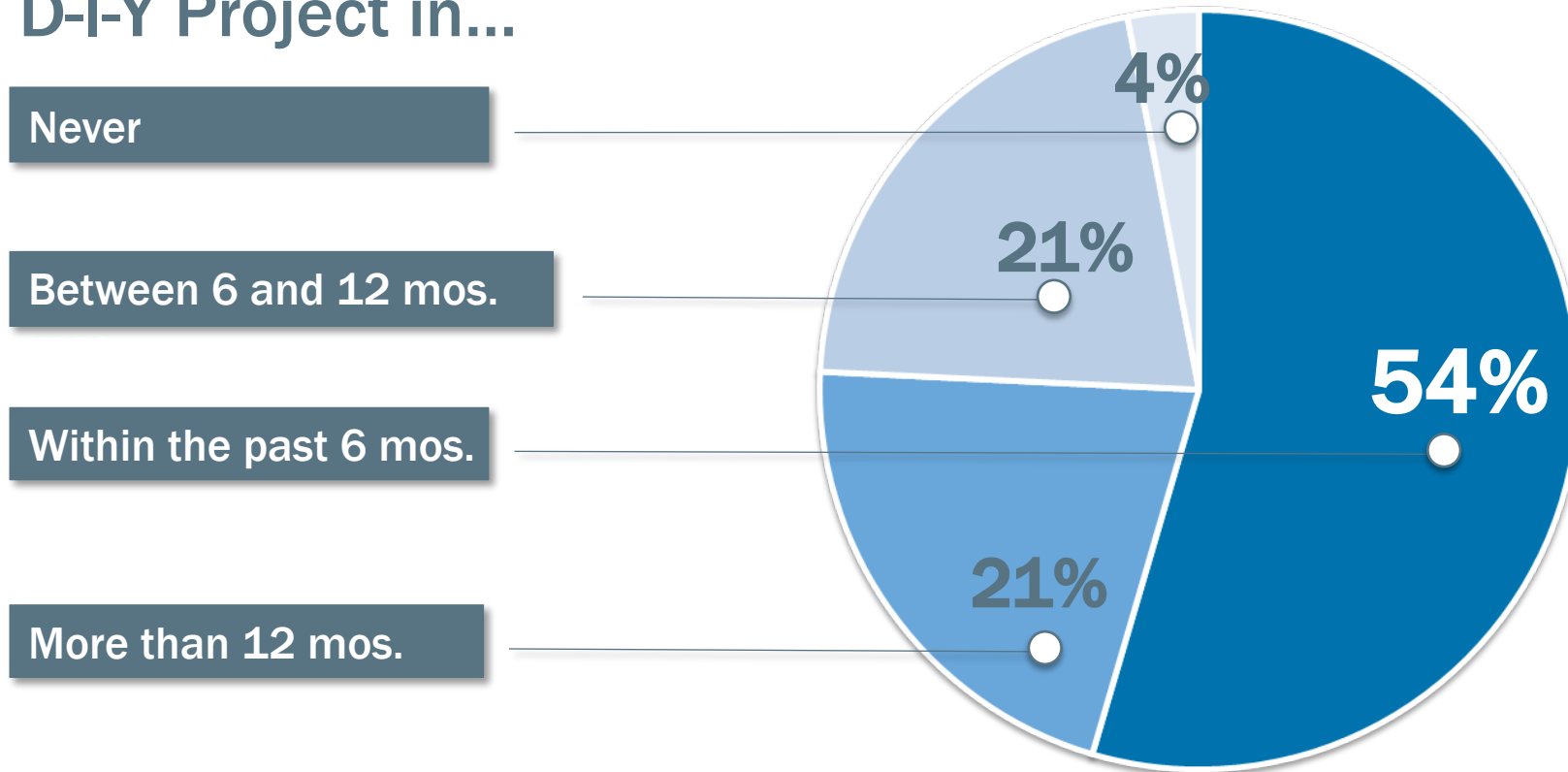
**“I’ve got more time and less money,  
so my to-do list got a little longer...”**

*-Respondent from Virginia*

Source: 2010 NRHA / Hardware Retailing Consumer Study

# Where We Stand

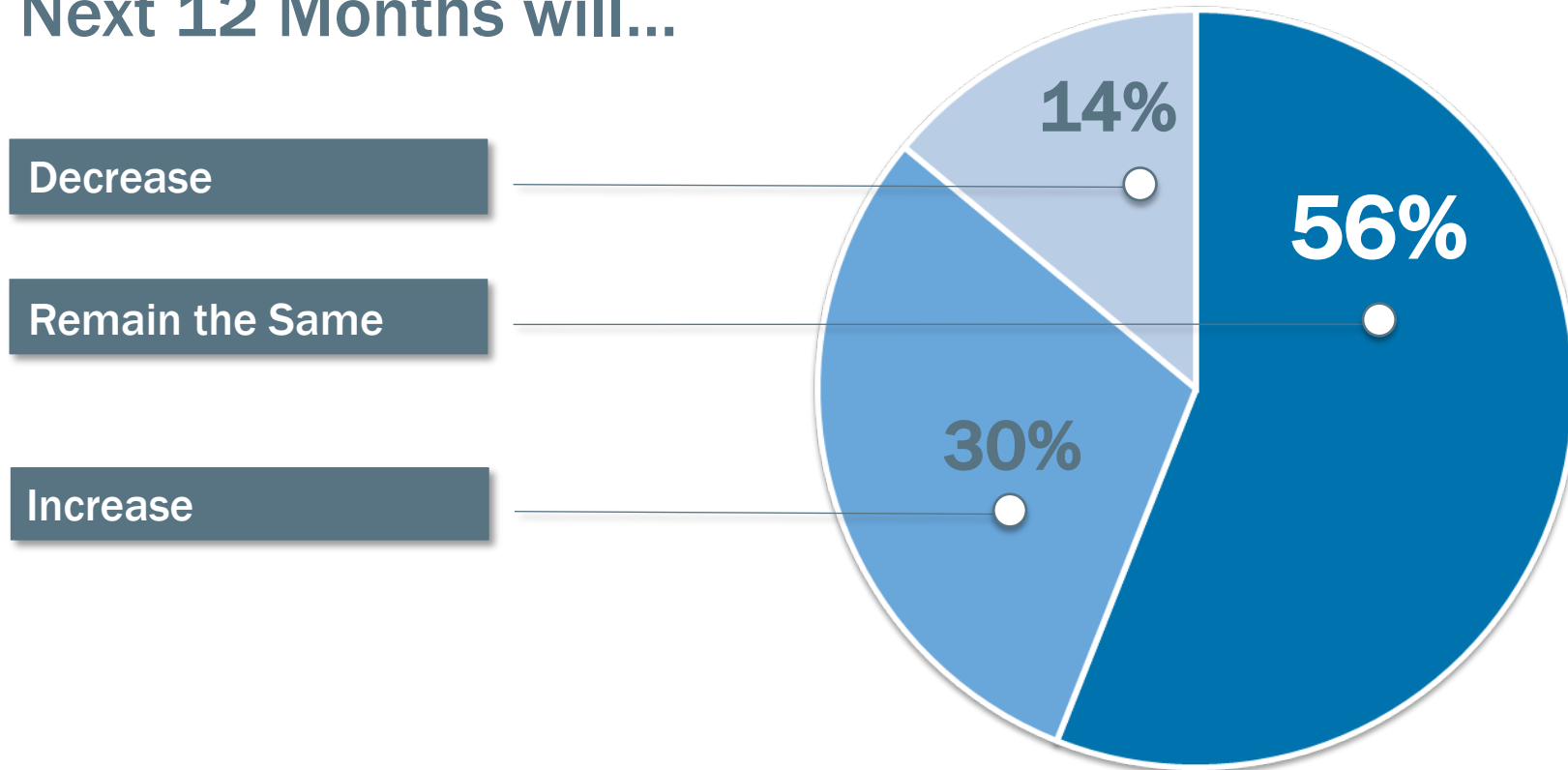
Percent of Consumers Saying They Have Completed a D-I-Y Project in...



Source: 2010 NRHA / Hardware Retailing Consumer Study

# Where We Stand

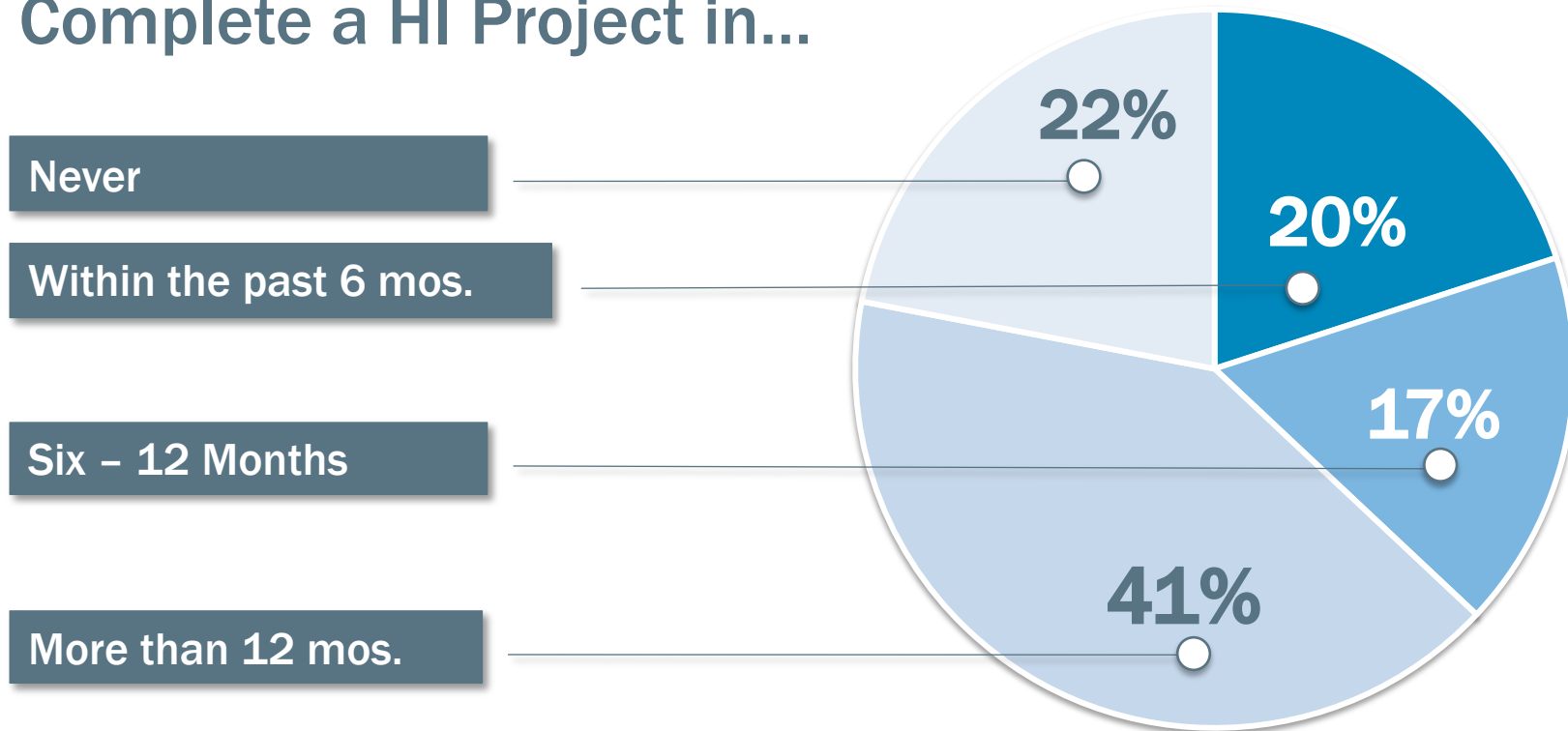
Percent of Consumers Saying D-I-Y Activity in the Next 12 Months will...



Source: 2010 NRHA / Hardware Retailing Consumer Study

# Where We Stand

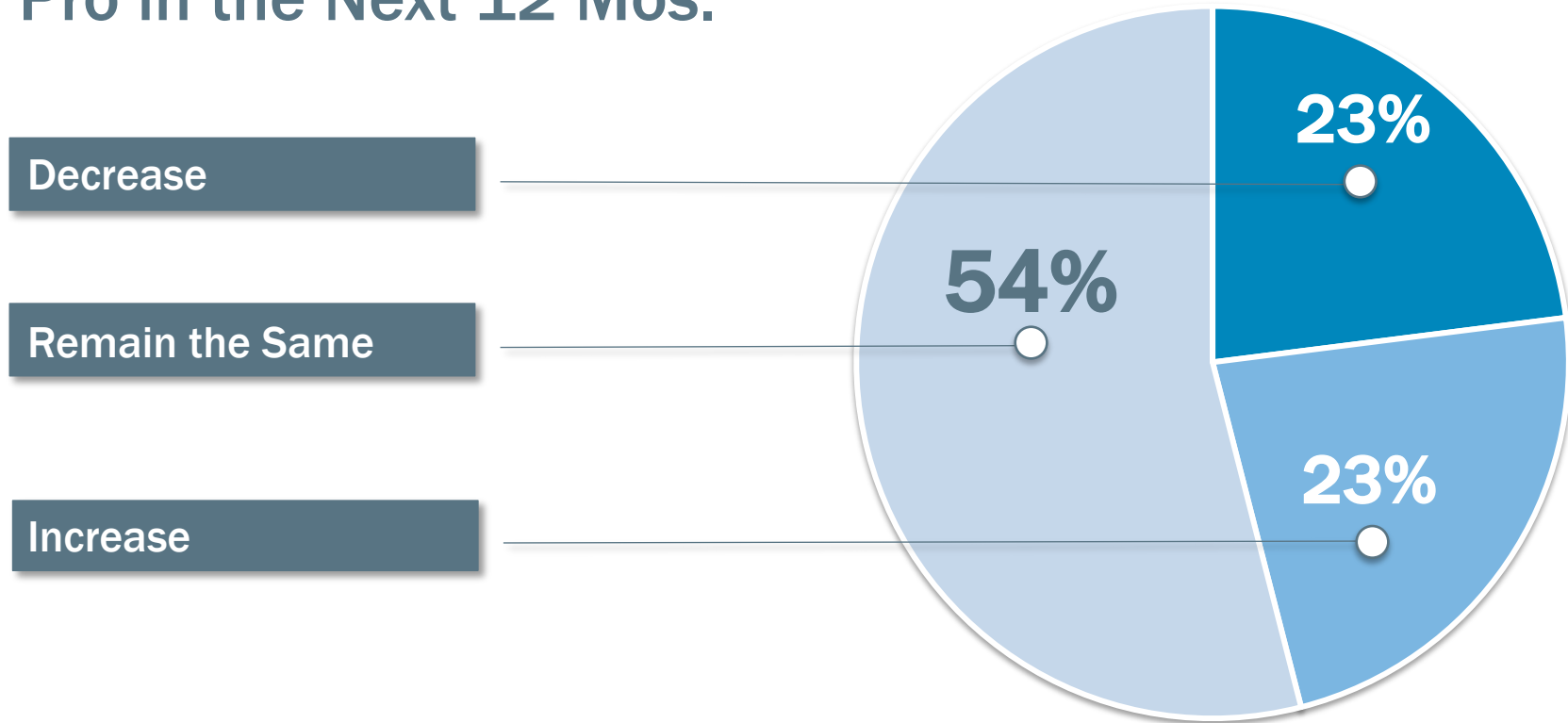
Percent of Consumers Who Have Hired a Pro to Complete a HI Project in...



Source: 2010 NRHA / Hardware Retailing Consumer Study

# Where We Stand

Percent of Consumers Saying Their Likelihood to Hire a Pro in the Next 12 Mos.



Source: 2010 NRHA / Hardware Retailing Consumer Study

# Impact at Retail

- Rather than switching into B-I-Y mode, retailers must be prepared for a customer that needs help, along with product selection and pricing.
- Particularly lumber dealers and home centers that may see a greater influx of DIYers wanting to tackle increasingly complex projects.

**Reports of the Death of DIY  
May Have Been a Bit Premature!**



# Motivating Factors

**27%**

Say, “I want to make my home more comfortable to live in.”

**27%**

Say, “I want to maintain my home to keep it in good working order.”

**5%**

Say, “To increase the value of my home.”

**“I don’t think I’m going to be able to sell my home anytime soon, so I might as well get comfortable...”**

*-Respondent from Missouri*

Source: 2010 NRHA / Hardware Retailing Consumer Study

# Motivating Factors

**46%**

Say, “I get great satisfaction out of completing a home improvement project.”

**47%**

Say, “I perform D-I-Y projects to save money.”

**“It just means more to me if I am able to take on a project and finish it, it’s an experience...”**

*-Respondent from Ohio*

Source: 2010 NRHA / Hardware Retailing Consumer Study

# Growing Confidence

22%

**Basics Only.** I may hang pictures or do a little touch-up painting around the house.

38%

**Weekend Warrior.** I take care of my own lawn, paint the occasional room and can fix a leaky faucet.

25%

**Serious DIYer.** Painting rooms, laying tile, installing a garbage disposal are all things I'm comfortable with.

15%

**Semi Pro.** I can build a deck, drywall a room or hang a new door without much of a problem.



# Female Influence

**21%**

Of female consumers identify themselves as “Serious DIYers.”

**11%**

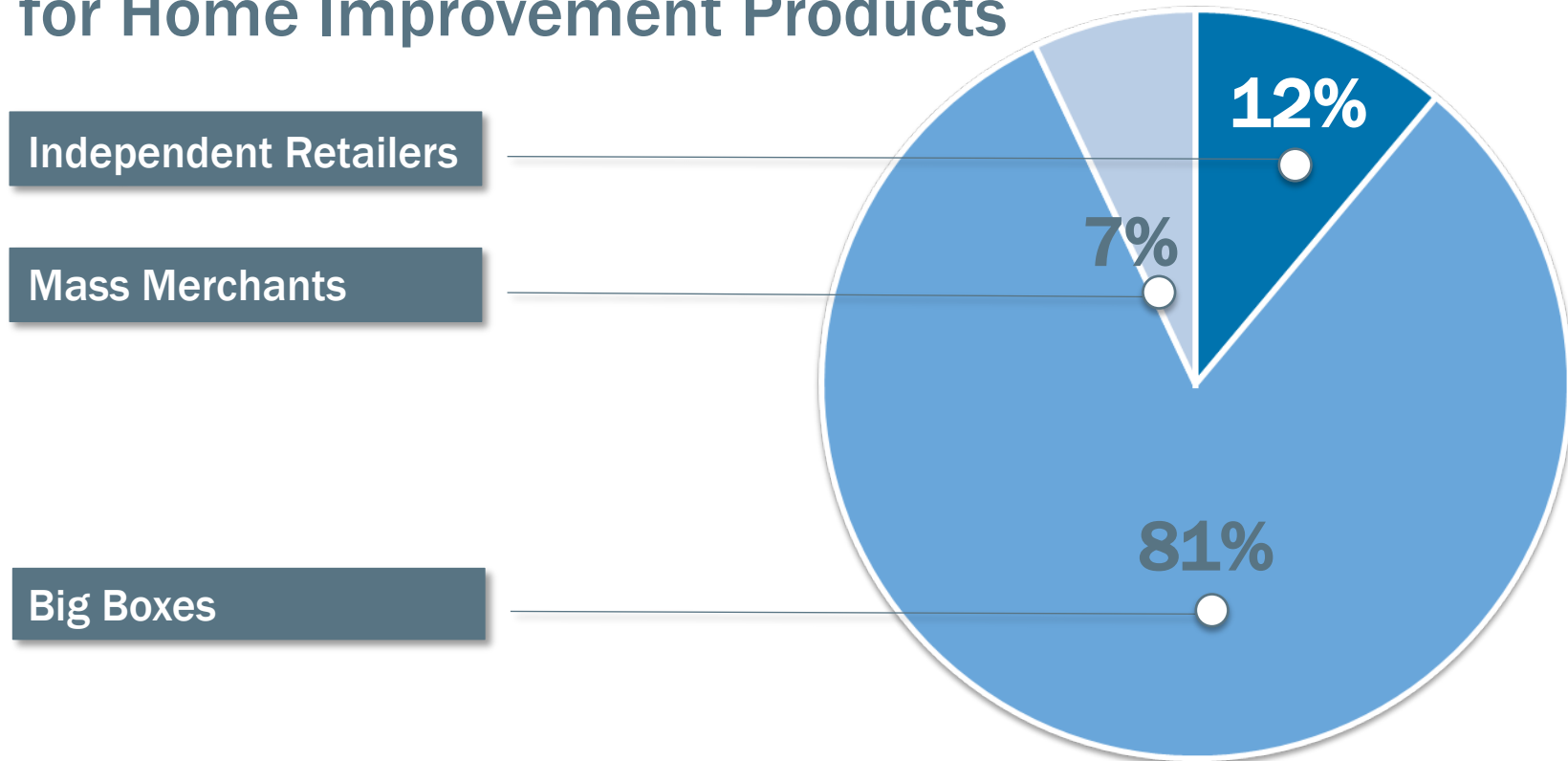
Identify themselves as “Semi Pros.”

**Adding Housewares and Giftwares is Only Part of the Equation.**

Source: 2010 NRHA / Hardware Retailing Consumer Study

# Where They Shop

Percent of Consumers Identifying as Primary Source for Home Improvement Products



Source: 2010 NRHA / Hardware Retailing Consumer Study

# Source for Advice

**47%** Of respondents say they turn to Big Boxes as their FIRST source of information for D-I-Y projects.

**26%** Of respondents say they turn to the Internet as their FIRST source of information.

**7%** Of respondents say they turn to Independent Retailers as their FIRST source of information.

**Independent retailers are known for service but the edge is slipping.**



# Who Do You Trust?

**46%** Of respondents say Big Boxes are the most reliable source of information for D-I-Y projects.

**24%** Of respondents say the Internet is the most reliable source of information.

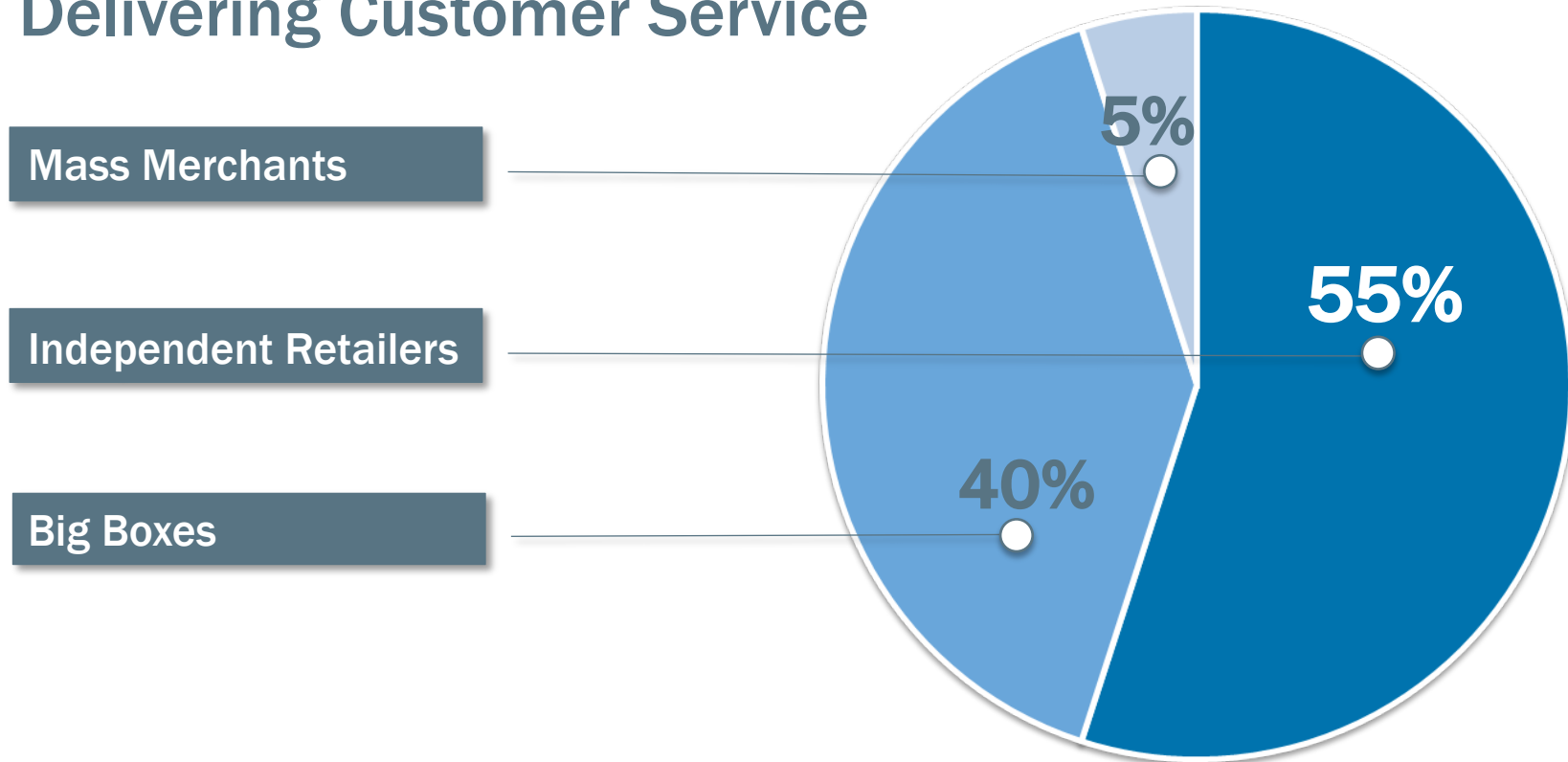
**9%** Of respondents say Independent Retailers as are the most reliable source of information.

**Independent retailers are known for service but the edge is slipping.**



# Best Service

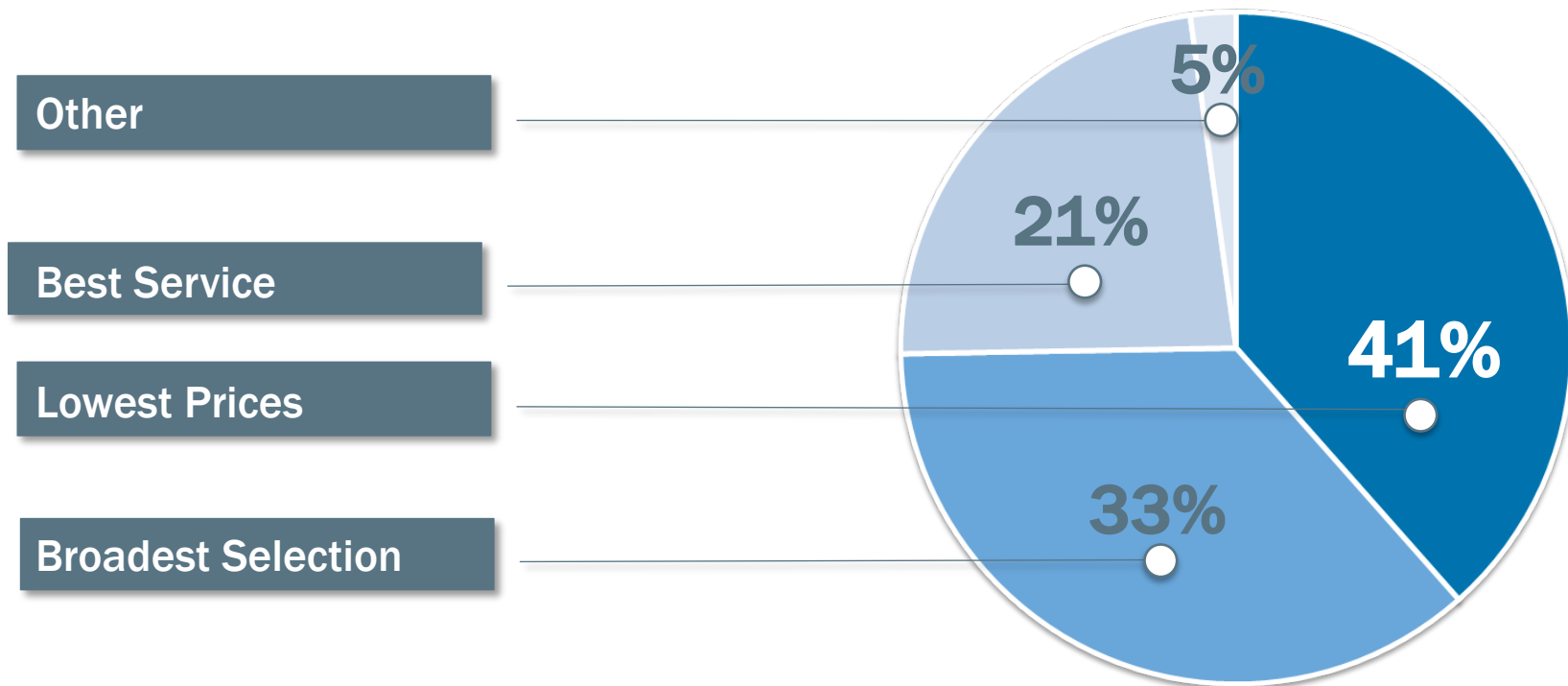
Percent of Consumers Identifying as Best at Delivering Customer Service



Source: 2010 NRHA / Hardware Retailing Consumer Study


# How Do You Choose?

Percent of Consumers Identifying as Single Biggest Factor when selecting where to shop



Source: 2010 NRHA / Hardware Retailing Consumer Study

# Things to Take Away

- D-I-Y Activity is still alive and well.
  - Economy has had an impact, albeit a different one than we originally thought.
  - Motivations behind D-I-Y activity has changed.
  - Females more confident in abilities. More demanding of their retailers.
  - Still a place for pros.
  - Independent retailers have a challenge with new today's consumer.
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# THANK YOU!

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