

SMART RESEARCH SERIES

What are user buying habits & channel preferences in the sealant category?

ABOUT THE SMART RESEARCH SERIES.

Bostik regularly conducts in-depth assessments of its priority markets using both quantitative and qualitative research methods. As part of this research programme, a qualitative study was conducted between June and September 2018 on the sealants market with this series of papers presenting end user views and perceptions of the category.



While it is impossible to endorse or discount these views due to the nature of the study and relatively small sample size, the findings indicate that traditional channels are still alive and well when it comes to sourcing sealants. They indicate that both DIY users and professionals continue to gravitate towards the outlet types they have traditionally used. Overview of the key takeaways: →

FINDING 1 – DIY-ERS BUY SEALANTS IN DIY STORES

Despite the growing availability of DIY products in a variety of (online) channels, participants in the research indicated a strong preference for purchasing sealants through DIY outlets. Particularly from larger retailers due to their proximity and accessibility. This is explained by the available comprehensive ranges and product choices, the perception of lower prices, the opportunity to buy other products alongside sealants and the offered advice. E-commerce channels were mainly mentioned when discussing the convenience offered through click & collect.

FINDING 2 – PROFESSIONALS STILL BUY IN TRADE OUTLETS

Professional users expressed a strong preference for outlets catering for the trade when purchasing sealants. While they occasionally use channels such as DIY outlets, many participants indicated that this would only be in cases where they had an urgent need. Trade outlets are preferred because of secure preferential prices and rates for large volumes, the full access to professional ranges and brands as well as specialised ranges and advice.

FINDING 3 – NOT EVERYTHING IS PURCHASED ONLINE

An interesting finding emerged in relation to the use of online channels to source sealants and related products. Seemingly contradicting the common convention that online channels will dramatically reduce the share of traditional channels across all categories, none of the participants in the study had ever previously purchased sealants online. This can be explained by the longer lead times and perceived higher total cost. The perceived issues with refunds and returns also play a role.



This paper presents an overview of the buying habits and most commonly used purchasing channels by sealant users as identified in the study. For copies of additional publications in the series or a detailed overview of the research findings, please contact your local Bostik sales representative or info@bostik.com.

What are the main applications & uses of sealants?

How do users perceive sealant packaging?

What are user buying habits & channel preferences in the sealant category?

What are user pain points when using sealants?



FINDING 1

DIY ENTHUSIASTS STILL BUY SEALANTS IN DIY STORES...



Although smaller local players will undoubtedly be a vital supplier in many regional markets, this is most probably not reflected in the findings as the focus groups and face-to-face interviews were conducted in urban areas where DIY chains are highly visible.

While supermarkets and trade outlets such as builders merchants and plumbing centres are also used, purchases tended to be rare cases among the DIY enthusiasts interviewed. Similarly, DIY users sometimes use trade outlets but there appears to be a certain unease and reluctance due to their perceived focus on trade business.

Further exploration revealed the main reasons for a preference among DIY users for DIY outlets when purchasing sealants:



COMPREHENSIVE RANGES AND PRODUCT CHOICE

Participants frequently referenced the large ranges available in DIY outlets with all potential applications, brands, qualities and price points catered for.

PERCEPTION OF LOWER PRICES

Although users could rarely identify specific instances to endorse this view, there is a general perception that large DIY stores offer value for money compared to other outlet types. Will usually be purchasing other products alongside sealants. Participants also referred to the opportunity to purchase additional products, alongside sealants, in DIY outlets. Sealants were rarely seen as destination purchases in their own right with many respondents sharing that they use the opportunity to purchase other products during their visits.

EXPERT ADVICE ON OFFER

Novice users in particular value the opportunity to discuss their requirements with staff in DIY outlets and obtain advice on the best products to fit their needs. Although respondents returned mixed experiences depending on the outlets visited, it is clear that the opportunity to obtain additional guidance and recommendations is appreciated.

CONVENIENCE OFFERED THROUGH CLICK & COLLECT

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FINDING 2

...WHILE PROFESSIONALS STILL BUY IN TRADE OUTLETS



A similar pattern was found among professional users who expressed a strong preference for outlets catering for the trade when purchasing sealants. While they occasionally use channels such as DIY outlets, many participants indicated that this would only be in cases where they had an urgent need. In these cases, it is sometimes easier to access a DIY store from their working location or to source a wider selection of colours to match specific materials.

Trade users of sealants expressed a number of reasons behind their channel preference:



SECURE PREFERENTIAL PRICES AND RATES FOR LARGE VOLUMES

Often cited as the main reason for choosing trade outlets, professional users are often able to secure preferential pricing and discounts from professional-focused channels in return for large purchases or frequent custom. Despite the efforts of some traditional DIY players to attract professional users with trade discounts, participants generally select trade outlets for their supply requirements.

ACCESS TO PROFESSIONAL RANGES AND BRANDS

Professional users of sealants also raised the availability of professional brands and ranges as a reason to purchase through trade outlets. This differentiation of brands and ranges appears important to these regular users of sealants with perceptions of quality, ease of use and reliability highly influential in their decision to purchase from trade outlets.

SPECIALISED RANGES AND ADVICE

Additionally, professional respondents highlighted the availability of all product requirements at specialised trade outlets. For example, in the case of a new bathroom or plumbing installation, a trade user could potentially access all supply requirements ranging from sanitary fittings, pipes, tiles, adhesives and sealants from a single location. This offers significant convenience and can significantly reduce the time spent travelling and sourcing materials. When coupled with specialised advice and product recommendations for their needs, this was a strong reason to source from trade outlets.



FINDING 3

PERHAPS NOT EVERYTHING IS PURCHASED ONLINE AFTER ALL



An interesting finding emerged in relation to the use of online channels to source sealants and related products. Seemingly contradicting the common convention that online channels will dramatically reduce the share of traditional channels across all categories, none of the participants in the study had ever previously purchased sealants online.

Although the relatively small sample size of 60 people interviewed in the study is not enough from which to draw definitive conclusions, the fact that not one participant had ever purchased sealants through a digital retailer appears to indicate that traditional channels and outlets still have a vital role play – and that some categories may take more time to transition online than previously thought.

A number of reasons for the slow uptake of digital channels for sealant purchases were explored:

LONGER LEAD TIMES

Both DIY and professional users suggested the potential lead times and delays in delivery were a significant barrier. They suggested that visiting a physical outlet to source a product that is required immediately offers more certainty and an ability to complete the task at hand.

HIGHER TOTAL PERCEIVED COST

Cost and value for money were also cited as a frequent barrier to online purchasing. Although some online retailers may be able match or even beat the prices on offer from traditional DIY and professional outlets, the addition of delivery and related charges makes it uneconomical to do so.



PERCEIVED ISSUES WITH REFUNDS AND RETURNS

A related concern among sealant users was the potential inconvenience and expense should a product need to be returned. Numerous participants pointed to the nuisance factor in repackaging and mailing sealants to be returned, as well as the associated costs. With traditional outlets often in close proximity and clear procedures in place for returns, there was no perceived advantage to purchasing online.

While this group of participants had reservations over the usefulness of online channels, it is clear that digital services, including those offered by traditional DIY and trade players, can play an important role in any retailer's omni-channel strategy.

Furthermore, specific instances where professional users highlighted advantages to purchasing sealants online were in cases where large volumes were required, where bulk discounts or special promotions through online retailers were available or to source specialised products or brands which are not readily available in traditional outlets.



CONCLUSION

Although not a detailed exploration of the buying habits of sealant users, the feedback on preferred purchasing channels yielded some interesting insights. Although there is common agreement that the boundaries between distribution channels are becoming less defined, the study indicates that users maintain strong preferences for outlet types which have been specifically designed to cater for their needs.

While there is always likely to be some overlap between DIY and professional channels as both target new business, the future role of online channels in relation to sealant sales is seemingly less clear. While e-commerce and digital developments have undoubtedly transformed some categories, it is clear that DIY, and sealants in particular, still has some way to go to match the pace of change seen in other product types. As a result, traditional channels such as DIY stores and professional outlets will continue to play a central role in bringing sealant offerings to end users.

MARKET RESEARCH OVERVIEW

The research included fieldwork in France, Germany and the United Kingdom which was conducted by an external research firm. Both focus groups and face-to-face interviews were used as the primary research methods.

Focus groups

Two focus group sessions with seven to eight participants were conducted in each country with each lasting approximately two and a half hours. Pre-qualification of invitees was done in advance to ensure diversity in age, gender and sealant experience. All participants were homeowners.

The groups were divided according to level of experience with one group classed as Novice/Occasional Users and the other as Occasional/Regular Users. Novice/Occasional users were those who had used one product from the sealant category on one or two occasions over the previous 12 months. Occasional/Regular users were identified as those who had used at least two sealant products four to five times over the previous 18 month period.

Face-to-face interviews

Four face-to-face interviews were also conducted in each of the three markets. These were reserved for professional users of sealants with each interview lasting between 45-60 minutes.

The interviews covered both professionals in defined trades such as decoration or tiling as well as general contractors who perform a variety of repair and maintenance tasks. All were pre-qualified as regular users of sealants who routinely use multiple types of products from the category.



**SMART HELP:
PLEASE CONTACT YOUR
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