



Branch

of

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Understanding the Trade Customer and the Real Path to Digital Growth

Event Summary Report
Thursday 7th May 2026
The Grand Hotel, Birmingham



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Executive Summary

In this report you will read the insights and key takeaways from the Understanding the Trade Customer and the Real Path to Digital Growth event, held on Thursday 7th May 2026 at The Grand Hotel, Birmingham.

This was the inaugural Branch of the Future event, a partnership between Pimberly, Brave Bison, Commerce, and The Journey, attended by over 60 senior leaders from national and regional builders' merchants.

The report captures discussions on how trade customers are changing, the shift in buying behaviour across branch, phone, and digital channels, and the operational and digital gaps that create friction or lost revenue. You will also read about strategies and practical examples shared by industry leaders on building trust, improving stock visibility, ensuring delivery certainty, and embedding reliability across the customer journey.

Finally, this report highlights actionable insights and peer-led learnings designed to help merchants align their operations, customer experience, and digital growth initiatives with the expectations of today's trade customer.



The Changing Trade Customer

Speakers



Kyle Leivers
Co-Founder, The Journey



John Godwin
Co-Founder, The Journey

Trade buying behaviour has shifted

John Godwin and Kyle Leivers opened the event by setting out the gap between how trade customers now want to buy and what many builders' merchants currently provide online. Their research showed that digital is already influencing switching behaviour, with 31% of UK trade customers having already changed merchant because another website was easier to use, and a further 14% saying they would switch if they found one that worked better.

Kyle summarised the direction of travel simply:

“The migration is already happening.”

With 60% of trade customers expecting to use digital even more, and 39% now beginning online ahead of branch or phone, digital is increasingly part of the buying journey before the branch gets involved.

The online experience is still falling short

Many merchant websites still do not meet practical trade expectations. The research found that 89% of trade customers have abandoned a builders' merchant online order, while 64% still contact branch weekly for information they say should be available online. John and Kyle linked this to gaps around stock visibility, delivery certainty, account access, trade pricing, usability and AI readiness.

Stock and delivery stood out as major trust factors. 92% of trade customers said seeing branch stock matters, yet only 27% of assessed merchants show real-time branch stock with quantities. Delivery certainty was treated as just as important, with 86% saying they would switch if they could not get a specific delivery date.

Trust is built through certainty

John's message was that merchants who cannot provide certainty risk losing customers to competitors who can:

"If there's anything that you take from today, it is, you have to offer this to your customers and without it, you will not grow. In fact, the people that will offer it will grow."

Kyle reinforced the same point from the customer's perspective:

"If you want to win online with a builder or a trades person, certainty and being able to select when they want it is absolutely key." The central takeaway was that digital should support how trade customers already research, compare, check availability and plan work. The merchants that close the gap will be those that make online journeys reliable enough to earn the same trust customers currently place in the counter.





Key Stats

31%

of UK trade customers have already switched merchant because another website was easier to use; a further 14% would switch if they found one.

60%

expect to use digital more; 39% now start online before branch or phone.

89%

have abandoned a builders' merchant online order; 64% still call branch weekly for information they say should be online.

92%

say branch stock visibility matters; only 27% of assessed merchants show real-time branch stock with quantities.

86%

would switch if they cannot get a specific delivery date; 91% say choosing a delivery time would make them switch.

The Evolving Trade Customer

Speaker



Steve Collinge

Managing Director, Insight Retail Group

Legacy thinking is holding the sector back

Steve Collinge's talk explored how the trade customer is changing, and why merchants need to adapt before buying behaviour moves faster than their operating models. He opened by warning that the sector cannot rely on what worked historically:

“This industry at the moment is stuck with legacy systems, with out-of-date processes and with historical thinking.”

Merchants need to serve two different customers

A key theme was the difference between the traditional, branch-reliant customer and the newer, digitally native trade buyer. Steve framed this through two customer types: “Bob”, who values the branch relationship, and “Davey”, who expects speed, convenience and digital support.

The point was not that merchants need to choose between them, but that serving the next generation does not mean abandoning the current one:

“Just because you do something to keep Davey happy doesn't mean you alienate Bob.”

Convenience is now central to the trade journey

The session then moved into how convenience is changing the trade journey. Steve argued that rapid delivery, click and collect, lockers, live stock visibility and digital tools should not be treated as optional extras.

For younger trade customers with less time to waste, they are becoming central to the buying decision. As he put it:

“Convenience is the strategy.”

Influence is shifting before the branch visit

Steve also focused on the shift from branch-first relationships to problem-first decision-making. Trade customers are increasingly influenced by online content, social platforms, peer recommendations and AI-assisted search before they contact a merchant.

That means decisions may be shaped before the branch has any opportunity to influence them. His warning was clear:

“If you are not being shown within LLMs, if you’re not visible with the questions in the same way that Toolstation may be, then you are invisible.”

Merchants need to win the pre-branch moment

The central message was that the branch still matters, but it is no longer always the starting point.

Merchants need to win the pre-branch moment by making their expertise, product data, availability and content visible where customers now search, compare and make decisions.



Why So Much Trade Revenue is Still Offline

Host



Sam Crimes

Customer Success Manager, Pimberly

Panel



Jack Haywood
Head of eCommerce
Jewson



Pierre Krause
Chair Digital Tech
Forum, BMF



Andy Pickup
Digital Director
MKM

This panel explored why so much trade revenue still sits outside digital channels, even as customers use websites to research products, compare options and check availability. The discussion came back to trust: in product information, delivery promises, pricing, account visibility, branch alignment and the overall buying experience. The issue is not whether merchants have websites, but whether those websites are reliable enough for real trade buying behaviour.

Why does so much trade revenue remain offline?

The panel agreed that the main blocker is trust. Trade customers still rely on the counter because it gives them confidence: they can negotiate, check whether products are right for the job, confirm delivery and speak to someone who understands the branch operation. Digital channels often fail to provide the same certainty.

“The minute that you don’t give customers confidence that a product’s turning up at the right time, or they have to go and search for the information, they’re going somewhere else.”

– Andy Pickup, MKM

How close are merchants to a trusted digital experience for complex or high-value purchases?

For low-risk products, customers may be happy to transact online. For more complex purchases, such as plumbing, heating, kitchens or bathrooms, the panel felt most merchants are still some way off. These purchases need advice, compatibility information, local branch knowledge and confidence that the products will solve the customer’s problem.

“When I worked in a branch, it was – “I only speak to Steve,” because Steve is the guy they trusted. So that trust is not there.”

– Pierre Krause, BMF



What are the biggest barriers to shifting trade spend online?

The barriers were described as commercial, operational and cultural. Delivery reliability, convenience, branch habits, leadership appetite, customer expectations and investment all play a role.

Pierre Krause pointed to existing fulfilment tools, while Jack Haywood summed up the core blockers as a combination of commercial models, systems and data.

“For me, the biggest barrier is models, systems, and data.”

– Jack Haywood, Jewson

Is the challenge website performance, or wider commercial fundamentals?

The panel treated website performance as important, but not the core issue. Speed, UX and conversion optimisation matter, but only work when the underlying information is accurate.

Andy Pickup argued that product enrichment has a direct commercial impact, while Jack Haywood said websites should also support branch visits, account management, stock checks, price checks and acquisition.

“If you don’t have the right data, then customers don’t buy. It’s really straightforward.”

– Andy Pickup, MKM



Where is the biggest untapped revenue opportunity?

The opportunity is not to replace the branch, but to connect digital and branch channels so they work together.

Better product enrichment, account data, logistics data and category-level information could help merchants capture more online spend while improving branch conversations. The panel also highlighted the chance to win back smaller, higher-margin products that have drifted to other channels.

Digital should act in this industry as the midfield to assist the operations teams again and again, and again and again.”

– Jack Haywood, Jewson



Making the Shift: How Merchants Are Adapting to Changing Customer Behaviour

Host



Sam Crimes

Customer Success Manager, Pimberly

Panel



Adrian Gordon

eCommerce Director
JT Atkinson



Andy Pickup

Digital Director
MKM



Chris Maggs

Head of Customer Insight
and Proposition, Toolstation

This panel looked at what change actually looks like once merchants move beyond the idea of simply “having a website”. The discussion focused on the practical work behind adapting to modern trade customers: product data, search, pricing, range, stock, branch behaviour, team capability and connected systems. The panel also challenged the idea that transformation is mainly about front-end design, arguing instead that progress depends on fixing the fundamentals that shape whether customers can find, trust and buy the products they need.

What triggered the need to adapt?

The panel described change as something driven by the whole business rather than one isolated issue. Adrian Gordon explained that JT Atkinson saw three connected problems to address: products, pricing, then range and stock.

Andy Pickup added that the real shift came from observing customers using the website, listening to branches and testing assumptions about what customers actually wanted.

“The biggest shift for me is just observing people using the website, talking to the branches, and getting to the bottom of what they really want. Because what you think they want, probably 90% of the time, is wrong.”

– Andy Pickup, MKM

What did merchants prioritise first?

Product data and search were presented as the natural starting point because customers cannot buy what they cannot find.

Adrian Gordon said product discoverability came before pricing and stock because it was the most practical problem to tackle first and the foundation for everything else.

Andy Pickup agreed, framing it as an information architecture challenge across search, navigation, categories and product placement.

“If a customer can’t find a product, they can’t buy it.”

– Adrian Gordon, JT Atkinson



What proved harder than expected?

The hardest challenges were not limited to technology. The panel pointed to pricing complexity, branch-level variation, local range, supplier data, team capability and the difficulty of keeping information up to date across many locations.

Andy Pickup described the work as ongoing rather than a one-off project, with internal alignment across branches as important as the systems themselves.

“It’s all people and data problems. It’s the hearts and minds exercise. It’s all about people. It’s all about relationships. It’s all getting into the branches.”

– Andy Pickup, MKM

What has had the biggest impact so far?

The discussion suggested that impact comes from improving the parts of the journey that directly affect customer confidence: discoverability, pricing trust, branch alignment and operational visibility.

Andy Pickup highlighted branch pricing behaviour as a useful signal, while Chris Maggs pointed to the opportunity to use Toolstation’s traffic, convenience and proposition to sell familiar products in a simpler way.

“I think with our traffic, with our convenience and proposition, we can sell the same products simpler to more people.”

– Chris Maggs, Toolstation



What lessons would help others move faster?

The panel's practical advice was to start with the fundamentals, keep the scope grounded and make sure the systems behind the experience connect properly.

Chris Maggs argued that merchants do not always need huge new platforms to make progress; they need to start, get a small group together and build momentum. Adrian Gordon added that the right team matters just as much as the technology.

“It’s starting. It’s doing it, it’s getting a small group together and just getting going.”

– Chris Maggs, Toolstation



Who is Actually Buying From You Now?

Host



John Godwin
Co-Founder, The Journey

Panel



Adrian Gordon
eCommerce Director
JT Atkinson



Callum Budd
Research Director,
MRA



Will Hickman
Head of Sales and
Marketing, Ideal Bathrooms

This panel explored whether merchants really understand who their customers are today, and how quickly buying behaviour is changing. The discussion moved beyond a simple “traditional versus digital” split, focusing instead on messy customer data, fragmented journeys, changing expectations, the role of trust and the possibility that future buying decisions may be shaped by AI agents as much as human customers.

Do merchants still know who their core customer is?

The panel suggested that many merchants have an incomplete view of their customers because the data is often fragmented or difficult to interpret.

Will Hickman argued that merchants can be too focused on price and product, while missing the wider role they play in an installer's working life. Adrian Gordon said merchants may understand today's customers, but the buyer of tomorrow could look very different.

“I think we understand our current buyers, but the buyer of tomorrow might not even be a human.”

– Adrian Gordon, JT Atkinson

How are expectations changing between traditional and next-generation buyers?

The panel agreed that customer expectations are being shaped by experiences outside the merchant sector.

Customers now expect live stock visibility, order tracking, accurate availability and fewer frustrating gaps between what is promised online and what happens in the branch. Callum Budd said this is being driven strongly by younger customers, but Adrian Gordon argued the change is broader than age because everyone now uses digital services in other parts of life.

“People want to see where their order is. People want to know the stock availability live, and it needs to be accurate.”

– Callum Budd, MRA



How fragmented is the modern trade buying journey?

The buying journey was described as highly fragmented across branch, phone, website and other channels.

Customers may start on their phone, go into branch for advice, order later through another channel or follow up via WhatsApp.

Will Hickman summed up the expectation as simple to describe but difficult to deliver: customers want flexibility without losing consistency.

“I think what people want is to order any which way you want to 24/7, but get exactly the same service.”

– Will Hickman, Ideal Bathrooms

What really drives trust, loyalty and purchase?

The panel challenged the idea that loyalty is mainly emotional. Callum Budd said trust is usually the strongest link to advocacy and loyalty, while Adrian Gordon argued that merchants sometimes mistake loyalty for lack of choice or customer inertia.

Will Hickman added that loyalty is easy to lose when customers have more options, and that price is only one part of a wider experience built around availability, service and transparency.

“Trust is almost always the strongest link to brand advocacy and brand loyalty.”

– Callum Budd, MRA



What behaviour shifts matter over the next three to five years?

The discussion ended by looking at split baskets and the role of AI in future buying. Adrian Gordon warned that customers may increasingly use automated systems to optimise baskets across multiple suppliers, especially where products can be delivered quickly by pureplays or marketplaces.

The risk for merchants is that high-margin goods continue to move elsewhere, leaving them with lower-margin, harder-to-serve categories unless they better understand how customers now assemble and source a full job.

“If you then think of an automated buying system that doesn’t have to buy all of the products from one merchant anymore, you’re going to end up with split baskets where they’re optimizing the full basket, but between multiple merchants. That’s really scary.”

– *Adrian Gordon, JT Atkinson*



From Counter to Click: How Loyalty is Being Re-Written

Host



Steve Collinge

Managing Director, Insight Retail Group

Panel



Rebecca Johnstone

Product Manager
CMO Group



Will Hickman

Head of Sales and
Marketing, Ideal Bathrooms



Shaun Bridgeman

Head of eCommerce
MP Moran

This panel explored how loyalty is changing as trade customers gain more ways to buy, compare, search and source products. The discussion moved beyond the idea of loyalty as a branch relationship alone, focusing instead on trust, convenience, availability, product data, delivery confidence and ease of purchase. The panel also looked at how AI is starting to influence customer journeys, both through internal business processes and through how customers discover products and answers online.

What has the biggest influence over where trade customers buy?

The panel pushed back on the idea that price alone determines where customers buy. Shaun Bridgeman argued that trust is the strongest driver, especially when customers need a product quickly and are willing to pay more for certainty.

Rebecca Johnstone pointed to convenience, particularly where customers need help sourcing products or working around long lead times.

“For me the biggest one is trust. Customers will pay over the odds to get something when they need it.”

– Shaun Bridgeman, MP Moran

How is customer loyalty evolving?

Loyalty was framed less as habit and more as confidence in the full buying experience. Will Hickman said product data matters, but only as one part of a wider recipe that includes availability, lead times, transparency and customer confidence.

The panel agreed that customers return when the experience removes uncertainty and helps them buy without having to chase basic information.

“Product data is very important, but that all builds the trust and the transparency to enable the customer to buy with confidence.”

– Will Hickman, Ideal Bathrooms



Where is the balance shifting between branch loyalty and digital convenience?

The discussion suggested that branch relationships still matter, but customers increasingly expect digital channels to provide the same confidence, speed and support.

Rebecca Johnstone described convenience as a key reason customers buy from CMO, with customer service teams helping customers source products or find workarounds when online logistics do not meet their needs.

“I would say it’s mainly convenience... if a product has a really long lead time, they will contact one of our CSAs and ask, is there anything you can do about sourcing it somewhere else? And I think that helps build the loyalty towards our superstores.”

– Rebecca Johnstone, CMO Group

What causes customers to question loyalty?

The panel highlighted simple digital failures that create friction: missing wallet payments, poor search results, unreliable stock, long lead times, weak product descriptions and supplier communication gaps.

Shaun Bridgeman used search as a practical example, arguing that merchants need to pay attention to what customers search for and where those journeys fail.

“Customers are asking questions, how do you answer them? No one thinks about that.”

– Shaun Bridgeman, MP Moran



What will define loyalty for the next generation?

The panel's forward-looking discussion centred on simplicity, data quality and visibility in AI-assisted discovery. Shaun Bridgeman argued that merchants need to give LLMs accurate, useful product information, while Will Hickman linked loyalty back to making buying easier for the customer. In that context, loyalty will depend on whether merchants can provide the right answers, at the right moment, in the places customers increasingly search.

“Give the LLMs the right accurate information so that when a customer goes into ChatGPT, Copilot, asks the question, your data is in the right conversation.”

– *Shaun Bridgeman, MP Moran*



Why Most Trade eCommerce Currently Tends to Fail

Host



Rupert Chappell

Sales Director, Commerce

Panel



John Godwin

Co-Founder
The Journey



Adrian Gordon

eCommerce Director
JT Atkinson



Steve Collinge

Managing Director
Insight Retail Group

This panel looked at why trade eCommerce projects often fail to deliver the expected commercial results, even when businesses invest in platforms, systems and transformation. The discussion moved beyond the website itself, focusing on culture, product data, branch alignment, stock accuracy, delivery promises, leadership expectations and the need to connect digital work to real business problems rather than treating it as a standalone online channel.

Why do trade eCommerce investments still struggle to deliver?

The panel argued that trade eCommerce often struggles because digital is treated as a channel project rather than a business change project. Rupert Chappell framed the issue clearly: websites may launch, but the same calls and emails continue because the underlying customer needs have not been solved. John Godwin added that cultural resistance can be a major barrier, especially where digital is still seen as competing with traditional sales activity.

“The merchants who will lead B2B commerce in the next decade are the ones who made digital the foundation. Composable, connected commerce isn’t a technology decision, it’s a business transformation decision.”

– *Rupert Chappell, Commerce*

Where are the biggest structural blockers?

The biggest blockers were described as product data, legacy systems, branch-based operating models and organisational alignment. Rupert pointed to product descriptions written for warehouses rather than buyers, systems that were never designed for customer-facing portals, and businesses still structured around branches rather than digital.

John also described the historical mindset that can make eCommerce feel like a threat rather than an enabler.

“You’ve got product descriptions written for warehouses, and not buyers. You’ve got legacy systems that are not written or not designed to interact with a buyer portal. And you’ve got organizations that are designed around branches and not digital.”

– *Rupert Chappell, Commerce*



Where does eCommerce break down for customers?

The panel suggested that trade eCommerce breaks down when one part of the journey works but the rest of the business cannot support it.

Adrian Gordon described it as a chain: search, product range, product data, stock, pricing and fulfilment all need to work together. If one part is improved in isolation, the customer still hits friction somewhere else and the value of the digital investment is limited.

“We’ve delivered a really great site search, but the products aren’t there to be found. It’s a chain-link system. You have to optimise the whole chain.”

– Adrian Gordon, JT Atkinson

Is underperformance really a technology issue?

The panel agreed that technology matters, but it is rarely the whole answer. John Godwin argued that most platforms can do what merchants need within reason; the bigger question is whether the business is solving the right problem.

He gave debtor days as an example, explaining how digital communication helped solve a cashflow issue rather than simply chasing online conversion.

“It’s not just about conversion or migration from offline to online. It’s really getting stuck into what the business challenges are and how can digital support it.”

– John Godwin, The Journey



Where should merchants focus first?

The panel's advice was to start with the foundations rather than the front end. Steve Collinge pushed for test-and-learn thinking, arguing that merchants can trial lockers, delivery models or branch-level changes without waiting for a perfect transformation programme. John added that merchants should ask existing customers what they want, ask non-customers why they do not buy, and use that insight to shape the wider business strategy.

“There are so many things that can be done to just test and learn. And from that, actually, yeah, we learned something, we did something else. But if you don't step off the fence, you're just sitting there watching everybody else.”

– Steve Collinge, Insight Retail Group



Closing Remarks

Speaker



Allan Ward

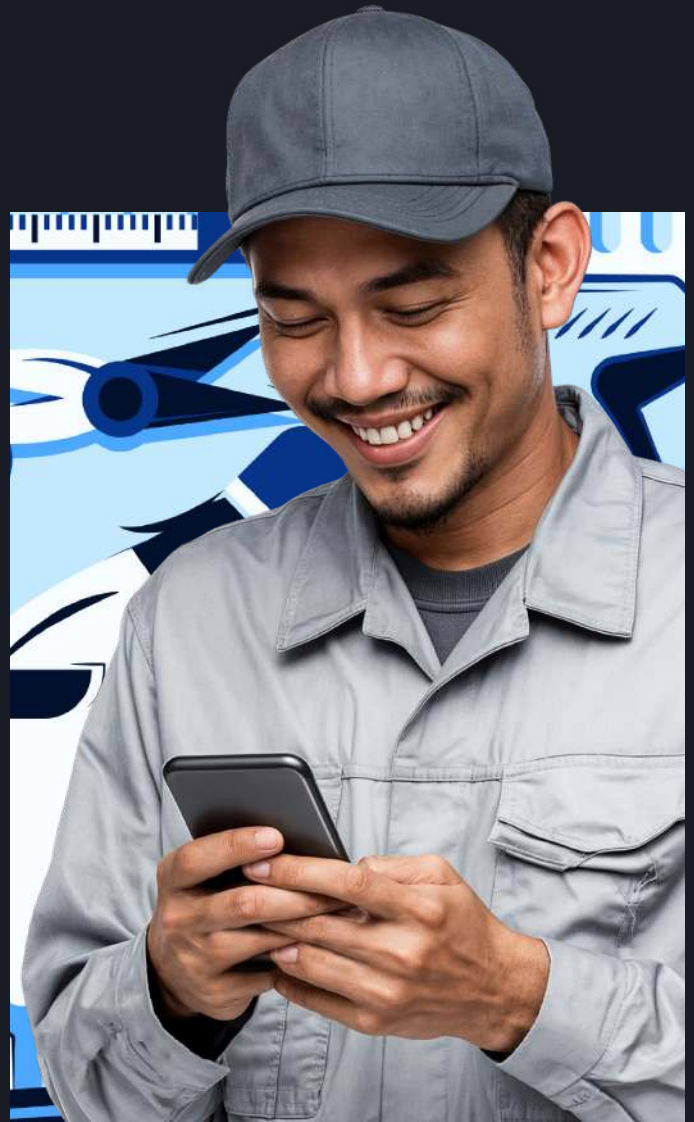
Managing Director, Brave Bison

The trade customer is changing

Allan Ward closed the event by bringing the day's discussions back to one central message: merchants cannot rely on the customer, channel or operating model they knew ten years ago. Referencing the story of Meta keeping the old Sun Microsystems logo on the back of its sign, he framed it as a reminder that “you're never too big to evolve” when customer behaviour and market expectations are changing around you.

There is no single trade journey

The first takeaway was that merchants can no longer design around one fixed idea of the trade customer. Some customers will still want the counter experience, while others expect the speed, visibility and convenience they get in everyday consumer journeys. Allan summed up the common thread across generations and channels: “People want certainty. People want convenience and people want trust.”



The branch still matters, but its value needs to extend

Allan's second takeaway was that digital is not about replacing the branch. It is about extending its value across more of the customer journey, including the pre-branch moments shaped by search, content, availability and expectation-setting. As he put it: "It's not about replacing the branch, it's about extending its value."

Trust must be built into every touchpoint

The final takeaway was that trust now depends on the full experience working consistently. Allan warned that unreliable stock, incomplete product data, disconnected systems, unclear delivery and broken journeys all damage confidence. His closing challenge was that customers will not wait indefinitely for merchants to catch up:

"The customer behaviour is changing, and I guess the real choice for us all here is do we want to evolve alongside it or do we want to become the logo on the back of somebody else's sign?"

Explore further with Branch of the Future

Discover more insights, resources, and event highlights from the Branch of the Future initiative.

Visit

www.bravebison.com/branch-of-the-future/



to continue learning and see how your business can adapt to the evolving trade customer.

About Pimberly

PIMBERLY.COM

Pimberly is a powerful, AI-driven Product Information Management (PIM) and Digital Asset Management (DAM) platform that simplifies product data management for retailers, manufacturers, and distributors. Its cloud-based solution automates workflows, enriches product content, and seamlessly integrates with e-commerce, ERP, and data platforms.

Designed for global teams, Pimberly scales to support complex catalogues and high SKU volumes. Leading B2B and construction brands rely on Pimberly to manage their product data, including Marshalls, JT Atkinson, Wolseley, TIMCO, Headlam and Highbourne Group.

About Commerce

COMMERCE.COM

Commerce empowers businesses to innovate, grow, and thrive by providing an open, AI-driven commerce ecosystem. As the parent company of BigCommerce, Feedonomics, and Makeswift, Commerce connects the tools and systems that power growth, enabling businesses to unlock the full potential of their data, deliver seamless and personalized experiences across every channel, and adapt swiftly to an ever-changing market.

Trusted by leading businesses like Coldwater Creek, Cole Haan, Harvey Nichols, King Arthur Baking Co., Mizuno, Perry Ellis, Puma, Revelyst, SportsShoes, and Uplift Desk, Commerce delivers the storefront control, optimized data, and AI-ready tools businesses need to grow, serve diverse buyers, and operate with confidence in an increasingly intelligent, multi-surface world.

About Brave Bison

BRAVEBISON.COM

Brave Bison is a media, marketing, and technology company purpose-built for the digital era, helping brands transform complex challenges into seamless digital experiences. The company works with leading global brands to engineer composable commerce infrastructures, platform integrations, bespoke UX design, tech-stack advisory, and rapid product innovation.

Brave Bison combines strategic consultancy, agile delivery, and industry-leading tools to deliver digital transformation at pace, turning complexity into clarity and clicks into conversions. Notable projects include multi-platform payments for Worldline and multi-market e-commerce ecosystems for retail giants.

About The Journey

START-THEJOURNEY.CO.UK

The Journey is a digital growth consultancy with deep expertise in the building materials and home improvement sector. It partners with ambitious brands to unlock e-commerce performance, improve customer experience, and drive measurable commercial growth.

The consultancy has worked with some of the UK's most respected builders' merchants, helping them modernise digital channels, connect with trade customers, and accelerate growth in competitive markets. The Journey provides strategy, UX optimisation, conversion improvement, and smarter, data-driven customer journeys, delivering practical, results-focused solutions.

