

Branch

of

future

the

In partnership with

 **BIGCOMMERCE**



**THE
JOURNEY**



pimberly



Brave Bison

Housekeeping

- WiFi: GHB-Guest
- No planned fire alarms
- Roaming mic throughout the event, raise a hand and ask questions throughout each panel discussion
- Tea and coffee break at 1450 for 20 minutes in the Breakout Space
- Open bar from 5pm

The Changing Trade Customer

Introduction

Kyle Leivers and John Godwin

Co-Founders

The Journey

The



Gap

Why merchanting hasn't finished the job.





**Kyle
Leivers**



THE
JOURNEY

Founded 2024

**John
Godwin**



THE
JOURNEY

Over **25** years
combined
experience in
merchanting.



What we do

Discover & feedback

Where the business is today, where it needs to be, what's working, what isn't and what will drive success.

Strategy & direction

Working with your leadership team, we build a strategy that delivers your business objectives and sets a direction the whole business can support.

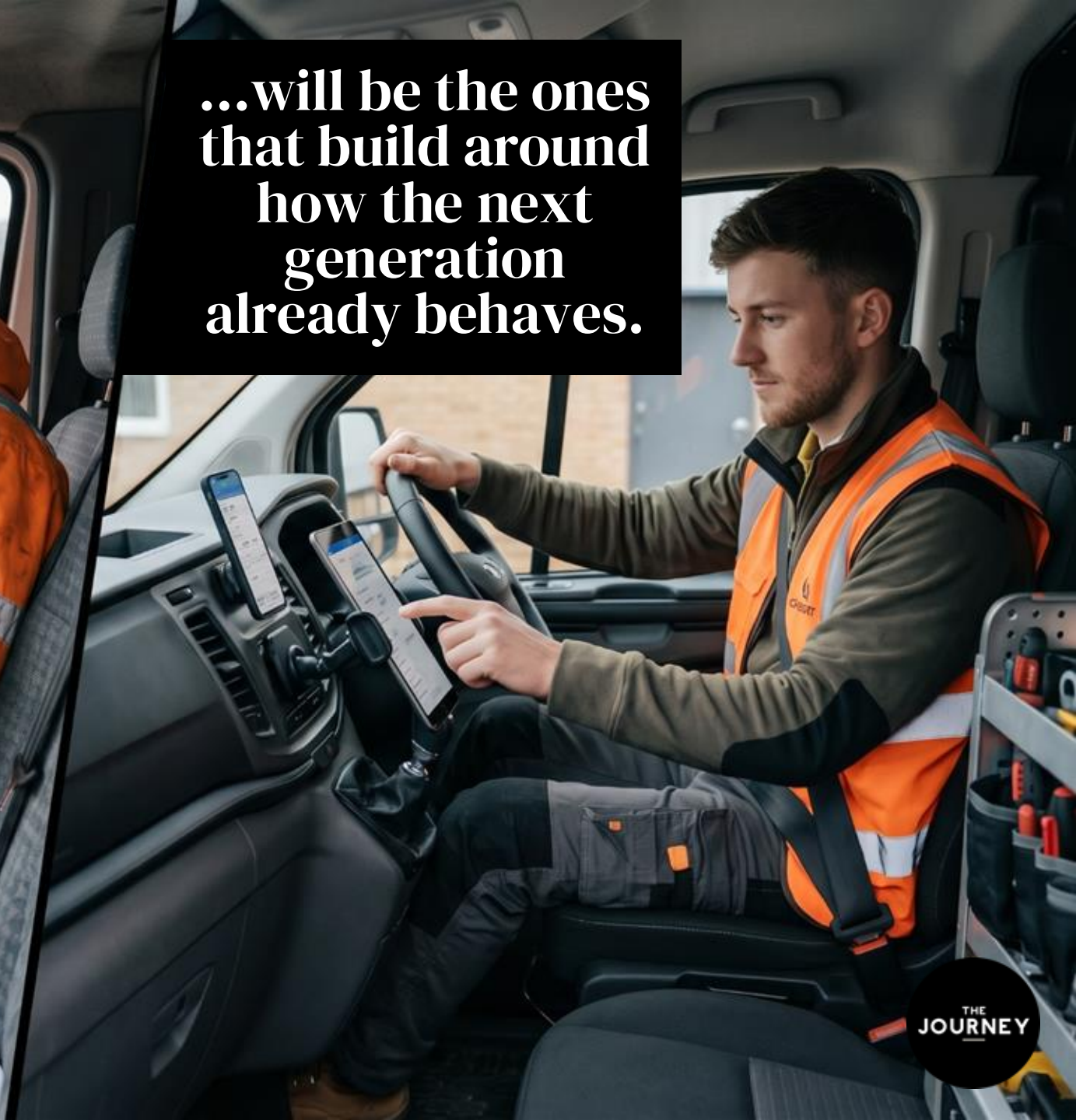
Delivery enablement

We support delivery across the whole business, from operational change and recruitment through to technology delivery and enablement.

**The merchants
who win the
next decade...**



**...will be the ones
that build around
how the next
generation
already behaves.**



We surveyed

Over **500** trade professionals across **13** trades.

..and we have assessed **22** of the country's leading builders' merchants against **43** separate digital experience metrics.



310%

of UK trade customers
have already switched
builders merchant
because another's
website was easier.

A further **14%** say
they would if they
found one that
worked better.

A man with a beard, wearing a dark jacket with "BUILD & REPAIR" on the chest, is looking at a smartphone in a workshop. The background is dark and industrial, with a car's engine visible. A small white cup with "DAVE" written on it is on the engine. The overall lighting is dramatic, with the man's face and hands highlighted.

Almost half of trade customers in the UK are actively or latently willing to switch merchants over digital experience alone.

“The question for this room is whether they switch to you, or away from you.”



The *migration* is already happening..

Trade customers are shifting online *fast*.

60% expect to use digital
even more.

39% now begin online, ahead
of the branch or phone.

BUT ..it's not working!

89%

have abandoned a builders merchant online order at some point.

64%

still contact their branch at least weekly for information they say should be available online.



Here's a small **taster** from our insight and assessment...

Trade pricing

Delivery certainty

Account access

AI readiness

Usability

Stock

Stock visibility is everything.

92%

Said seeing branch stock matters.

68%

Use sites to check stock.
#1 reason.



Only 27% of merchants show real-time branch stock with quantities.

95%

Said a specific delivery date matters.

86% would switch if they can't get one.

91%

Said being able to choose a delivery time would make them switch merchants.

No delivery date. No order.



Delivery certainty

+50% don't offer delivery dates

None offer time slot selection

92%

Said access to
account information
matters



but...



Account access

1 in 4 can't see
their credit
limit.

1 in 5 can't access
invoices

55%

of trade customers use merchant websites to check trade prices.

It's the #3 reason they visit.



Trade pricing

Trade pricing lacks transparency.

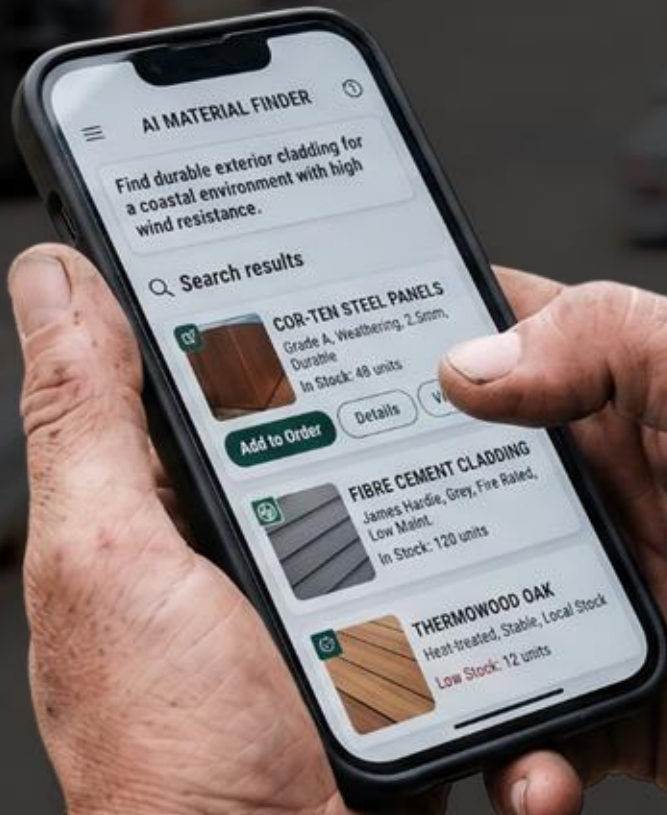
Only **14%** make it prominent for logged-in users, with little clarity at the public level.

AI is coming...

& it's already here.

70%
Are interested.

22%
Already use it.



AI readiness

0 out of 22
merchants have
fully optimised their
site for AI search.

Only 7
have made any meaningful
start.

92%

Said finding products easily matters.

25%

Hit slow or difficult sites.

1 in 10

Said performance is the biggest fix.



Almost two thirds of merchant homepages are rated 'poor' by Google

The worst score just **11** out of **100**

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JOURNEY

Digital merchandising report 2026.

**Scan now to book a short
session and we'll walk you
through your results.**

www.start-thejourney.co.uk



The Evolving Trade Customer

Guest Speaker

Steve Collinge

Managing Director
Insight Retail Group



Steve Collinge

Managing Director, Insight Retail Group Limited

Delivering insight, intelligence and ideas to Home Improvement retailers, merchants, distributors and manufacturers every day.



Today's Content

- Background to the Market.
- The Evolving Trade Customer.
- The Evolution of the Customer Journey.
- The Displacement of Influence.
- Winning the Pre-Branch Moment.

Market Background

RETAIL IS TOUGH



TRADE TAKING SHARE



DEMAND FOR CRAFTSMANSHIP



SKILLS SHORTAGE



TRADE IS DIVERSIFYING



TECHNOLOGY ACCELERATING

THE EVOLVING TRADE CUSTOMER

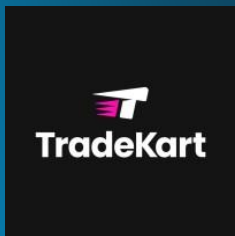
**AVERAGE AGE
OF THE TYPICAL
BUILDERS'
MERCHANT
CUSTOMER IS
55 YEARS OLD.**



Source: Builders Merchant Federation



**AVERAGE AGE
OF THE TYPICAL
TRADEKART
CUSTOMER IS
30 YEARS OLD.**



Source: TradeKart



TWO VERY DIFFERENT CUSTOMERS



Branch Reliant



Digitally Native

BUYING HABITS & BRAND LOYALTY



- **STICK TO WELL-KNOWN BRANDS** (e.g., DeWalt, Makita, British Gypsum, Howdens).
- **PREFER TRUSTED SUPPLIERS** they've used for years.
- **VALUE RELATIONSHIPS** with in-store staff and reps.
- More likely to **BUY IN BULK** and stockpile materials for future jobs.



- **OPEN TO TRYING NEW BRANDS**, especially if price and reviews are good.
- **SHOP AROUND** for the best deals, often comparing prices online.
- Value in-store relationships, but also **INFLUENCED BY ONLINE** reviews and peer recommendations.
- **PREFER TO BUY MATERIALS JUST-IN-TIME** rather than stockpiling.

TECHNOLOGY & DIGITAL ENGAGEMENT



- Use trade merchants' websites but **PREFER IN-STORE VISITS** for purchases.
- More likely to **CALL OR VISIT IN PERSON** for quotes and advice.
- Still **RELY ON TRADITIONAL INVOICING** and paperwork.
- **LIMITED USE OF SOCIAL MEDIA** for work—mainly Facebook.



- **HEAVY USE OF ONLINE ORDERING** and apps for quick purchases.
- **EXPECT INSTANT QUOTES** via WhatsApp, email, or app notifications.
- **PREFER CONTACTLESS PAYMENTS**, digital invoices, and online credit accounts.
- **USE INSTAGRAM, TIKTOK, AND YOUTUBE FOR INDUSTRY INSIGHTS AND TOOL REVIEWS.**

PRICE SENSITIVITY & DISCOUNT EXPECTATIONS



- **UNDERSTAND LONG-TERM PRICING TRENDS** and less likely to be price-sensitive.
- **EXPECT TRADE DISCOUNTS** based on loyalty and bulk buying.
- **PREFER TRADITIONAL CREDIT ACCOUNTS** with merchants.



- **PRICE-CONSCIOUS**, always looking for the best deals online.
- More likely to **MIX PURCHASES** between trade merchants, online retailers, and wholesalers.
- **WILLING TO USE BUY NOW, PAY LATER OPTIONS** (Klarna, PayPal Credit).

SHOPPING PREFERENCES & EXPECTATIONS



- **PREFER TO VISIT TRADE COUNTERS AND PHYSICAL STORES.**
- **ENJOY CHATTING WITH STAFF** for recommendations and problem-solving.
- **MORE PATIENT** and understanding of delivery lead times.
- **UNLIKELY TO TRY FAST DELIVERY OPTIONS.**



- **EXPECT AND WILL TEST** fast service, next-day or same-day delivery (click & collect).
- **LESS LIKELY TO VISIT STORES AS OFTEN.**
- **LESS PATIENT** and understanding of lead times.
- **PREFER SELF-SERVICE TOOLS** like online chat, FAQs, and live stock levels rather than talking to a rep.

**“The sole reason we
are in business is to
make life less difficult
for our customers”**

Busy, Broke and Burnt Out: UK Trades Warn 2026 Will Be a Pressure Cooker.

Posted on February 9, 2026 in Top News

“Material and tool costs are now squeezing nearly two-thirds of the trade, while late payments, tool theft and being undercut are eating away at already thin margins”.

THE EVOLUTION OF THE TRADE CUSTOMER JOURNEY

In the future, convenience will be a decisive factor, from rapid delivery, to drive-through collections and 24/7 lockers to seamless click & collect and digital tools.

By saving customers time and effort, merchants can win loyalty from a younger, faster-paced generation of tradespeople and set themselves apart from the traditional competition.

Convenience is no longer an
'add-on'

**Convenience is the
strategy**

THE DISPLACEMENT OF INFLUENCE

Shifting from the Branch-First Relationship to the AI-First Decision.



BEFORE: The Merchant-Led Journey

Linear | Branch-First | Relationship-Led

The Trigger: Need arises.

The Action: Visit or phone the local branch.

The Value: Counter conversation / Expert advice.

The Influence: Selection driven by what's on the shelf & who is behind the counter.

The Result: Purchase → Collection/Delivery.

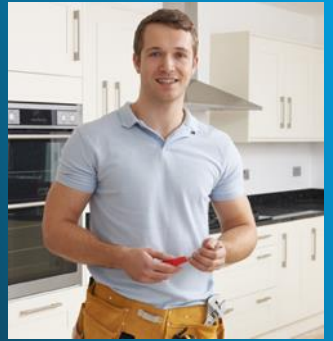


Where Value Was Created: At the counter. The branch was the starting point of the journey.

THE AI INFLUENCED JOURNEY

NOW: The AI Led Journey

Non-Linear | Problem-First | Decision-Before-Contact



The Trigger: Job or problem arises.

The Action: AI-Assisted Search (“Best fixing for...”, “Fastest solution for...”, “What do others use?”)

The Value: Pre-selection of solution (Brands and quantities decided via AI).

The Influence: Expectation Set (Price, speed, and availability verified before the engine starts).

The Result: Merchant chosen for **Fulfilment + Validation**.



The Displacement: The decision is made in the van or on-site. The branch is now the destination, not the starting point.

“This isn’t about tradespeople
abandoning merchants.

It’s about **when** decisions are being
shaped, and who gets to influence
them.”

Winning the *Pre-Branch* Moment (The Big One)

Marketing no longer “drives traffic” it shapes decisions before contact.

- Tradespeople are:
- Searching differently
- Asking AI for *solutions*, not suppliers
- Pre-deciding brands, quantities, expectations

2026 focus:

- Be visible where AI-assisted discovery happens
- Optimise content for **problem-first search**, not SKU-first
- Ensure your products, ranges and expertise are *machine-readable* and context-rich

Shift from Product Marketing to Task/Job Marketing

Tradespeople don't think in:

- SKUs, Categories, Promotions.

They think in:

- Jobs to complete, Time pressure, Risk avoidance

2026 focus:

Reframe marketing around **tasks, fixes, systems and outcomes**

Build content around:

“Best solution for...”

“Fastest way to...”

“What trades actually use when...”

Brands that stay product-led will lose relevance.

Merchants that stay category-led will lose influence.

Good Data & Visible Data = Marketing Effectiveness

Marketing can no longer sit downstream of:

- Poor product data.
- Inaccurate stock.
- Inconsistent pricing.

2026 focus:

- Treat **product, availability and fulfilment data** as marketing assets.
- Align marketing promises with operational reality.
- Kill anything that creates expectation gaps.
- The fastest way to destroy trust in an AI-influenced world is to overpromise and underdeliver - once.



THANK YOU

Questions?

Why So Much Trade Revenue is Still Offline

Panel Talk

Sam Crimes

Customer Success Manager

Pimberly

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Jack Haywood
Head of eCommerce
Jewson



Pierre Krause
Chair Digital Tech Forum
BMF



Andy Pickup
Director of Digital
MKM

Across the sector, why do you think so much trade revenue still remains offline? Is this primarily about customer behaviour, merchant capability, or trust in the buying experience?

How close do you think most merchants really are to offering a digital experience that trade customers genuinely trust for more complex or higher-value purchases?

Where do you see the biggest barriers preventing more trade spend from shifting from counter, branch or phone to online channels?

To what extent is the real commercial challenge about website performance, versus the wider fundamentals of product data, availability, pricing confidence and operational readiness?

Looking ahead, where do you believe the biggest untapped revenue opportunity sits for merchants who can better align digital experience with how modern trade customers actually want to buy?

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

Merchant Focus

Sam Crimes

Customer Success Manager
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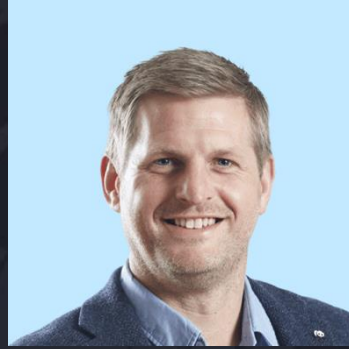
the



Adrian Gordon
eCommerce Director
JT Atkinson



Graham Allcroft
Head of IT
PJH Group



Andy Pickup
Digital Director
MKM



Chris Maggs
Head of Customer Insight and Proposition
Toolstation

What was the moment, shift or customer reality that made you realise parts of your business needed to adapt and what was driving that urgency?

When you began making changes, what did you prioritise first, and why did that feel like the most commercially important place to start?

Looking back, what challenges, assumptions or initiatives proved harder than expected and what did that reveal about the wider complexity of change?

What changes have had the most meaningful impact on customer experience, commercial performance or operational effectiveness so far?

For merchants earlier in that journey, what practical lessons or decisions would you share now that could help them adapt faster or avoid common mistakes?



Break

A short break for refreshments.

Who is Actually Buying From You Now?

Panel Talk

John Godwin

Co-Founder

The Journey

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Adrian Gordon
eCommerce Director
JT Atkinson



Callum Budd
Research Director
MRA



Will Hickman
Head of Sales and Marketing
Ideal Bathrooms

Across the sector, do you think most merchants still have an accurate picture of who their core customer really is today or are buying groups evolving faster than businesses realise?

How are customer expectations changing between traditional trade buyers and the next generation of buyers entering the market?

How fragmented is the modern trade buying journey across branch, phone, website and other channels and do you think most merchants are genuinely set up for how customers now want to buy?

Where do you see the biggest gap between how merchants believe customers make decisions, and what actually drives trust, loyalty and purchase today?

Looking ahead, what customer behaviour shifts do merchants need to better understand now if they want to stay competitive over the next three to five years?

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

Panel Discussion

Steve Collinge

Managing Director
Insight Retail Group

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Rebecca Johnstone
Product Manager
CMO Group



Will Hickman
Head of Sales and Marketing
Ideal Bathrooms



Shaun Bridgeman
Head of eCommerce
MP Moran

Across the sector, what do you believe now has the biggest influence over where trade customers choose to buy, relationships, price, convenience, certainty, or something else?

How is customer loyalty evolving today, are merchants still primarily winning through relationships, or are speed, availability and ease of purchase becoming stronger decision drivers?

Where do you think the balance is shifting between traditional branch loyalty and the growing expectation for seamless digital and multichannel convenience?

What are the biggest friction points or failures that now cause trade customers to question loyalty or consider alternative suppliers?

Looking ahead, what will define loyalty most in the next generation of trade customers and where do merchants need to adapt now to stay relevant?

Why (Currently) Most Trade eCommerce Tends to Fail

Expert Panel

Rupert Chappell
Sales Director
Commerce

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John Godwin
Co Founder
The Journey



Adrian Gordon
eCommerce Director
JT Atkinson



Steve Collinge
Managing Director
Insight Retail Group

Across the sector, why do so many trade eCommerce investments still struggle to deliver, despite significant spend on platforms, systems and transformation?

Where do you typically see the biggest structural blockers to success, product data, stock accuracy, operational processes, organisational alignment, or leadership expectations?

At what point does trade eCommerce most commonly start to break down for customers and what does that reveal about wider business readiness?

To what extent is trade eCommerce underperformance really a technology issue, versus a broader commercial and operational challenge?

If a merchant wanted to materially improve digital performance over the next 6–12 months, where should they focus first to create the biggest commercial impact?

Closing Remarks

Allan Ward

Managing Director

Brave Bison



Drinks & Networking

Time for informal networking with peers and speakers with drinks in a private space.