



# Understanding the Merchant Research Results

---

Research Study  
In partnership with



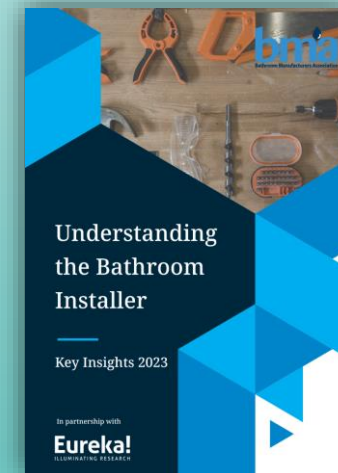
# Background

Over the past three years, the BMA has been gaining insight into the full purchasing chain for bathroom products in the UK



40%

of homeowners stated that the bathroom fitter had the greatest influence over their choice of products



60%

of installers chose a merchant as their retailer of choice for supplying bathroom products for the domestic home\*

\* Includes National Merchants, independent chains and local independents



# 1991

Founded

---

# 30+

Years experience

# mra research

insights, strategy, success

# 100+

UK-based companies  
in construction have  
worked with us

---

# 110+

BMBI reports  
published

# Our portfolio of research tools & techniques

## Customer satisfaction

Better **understand your customers**, to improve satisfaction and retention, whilst appealing to prospects.

## Brand health

Measure your **brand performance, through tracking and benchmarking** - to drive awareness and get ahead of competitors.

## Research for marketing

Create **gripping content and marketing campaigns**, with research at its heart.

## Market intelligence & insight

**Understand your market to identify opportunities and challenges** - improving your product and brand positioning.



mra  
research

# Objectives

To understand the drivers and barriers to increasing sales of bathroom products via the merchant sector, including

1. How merchants choose the products that they stock
2. What encourages counter staff to recommend a product
3. The dynamics of the merchant/installer relationship
4. Understanding the product journey from manufacturer to merchant to installer to consumer

# Methodology

## Two-Phase Approach

- An online quantitative survey, 21 questions. Targeting merchant counter/retail staff. The survey was live between October 2024 and January 2025
- Followed by qualitative telephone interviews with buying or marketing personnel within the merchants

## Respondent Profile

- Merchants selling bathroom products direct to installers and end users
- Nationals, Independent Chains, Local Independents
- Across a range of different responsibility levels

# Incentives

£5 charity donation for each completed survey

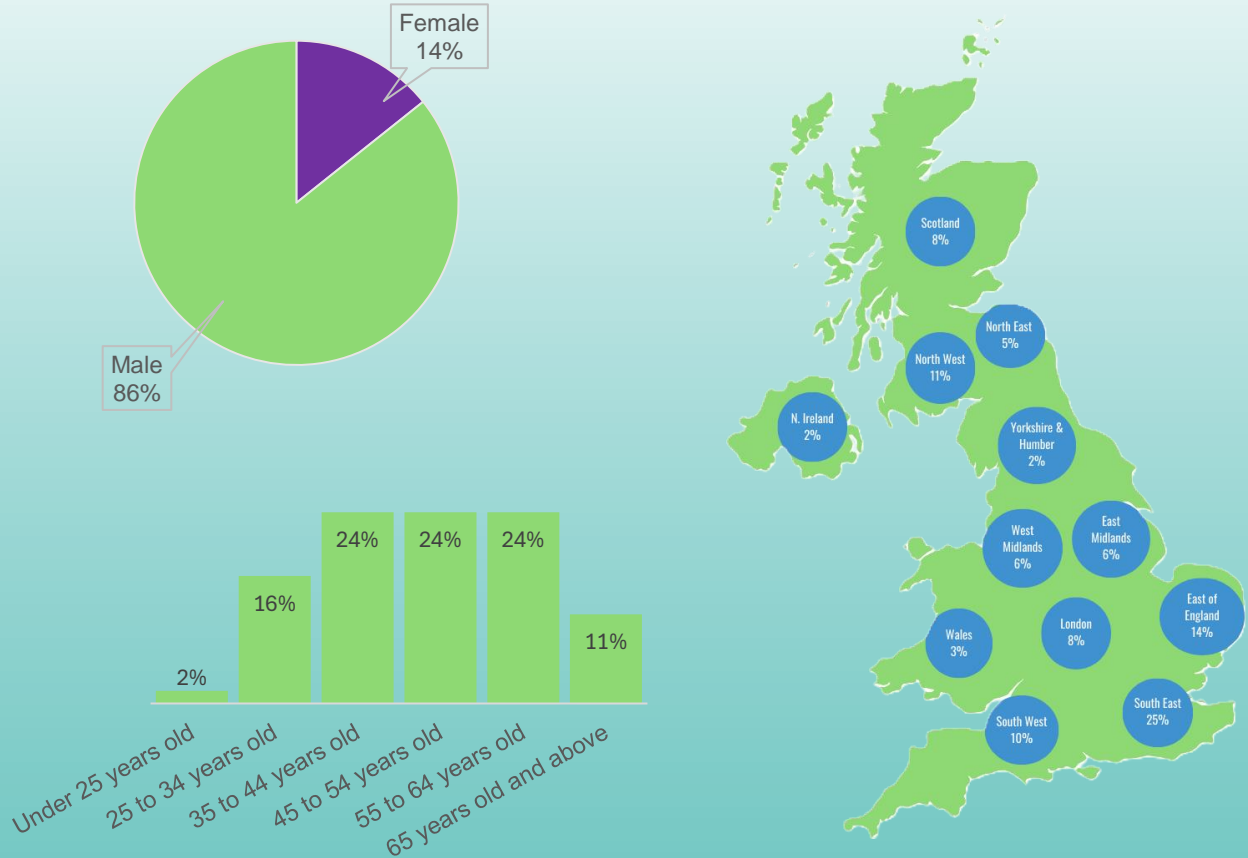
£20 charity donation for each completed telephone interview

The charities supported

- Band of Brothers
- Crash
- Lighthouse
- Construction Youth Trust
- B&CE
- WaterAid

Total amount donated by BMA - £575

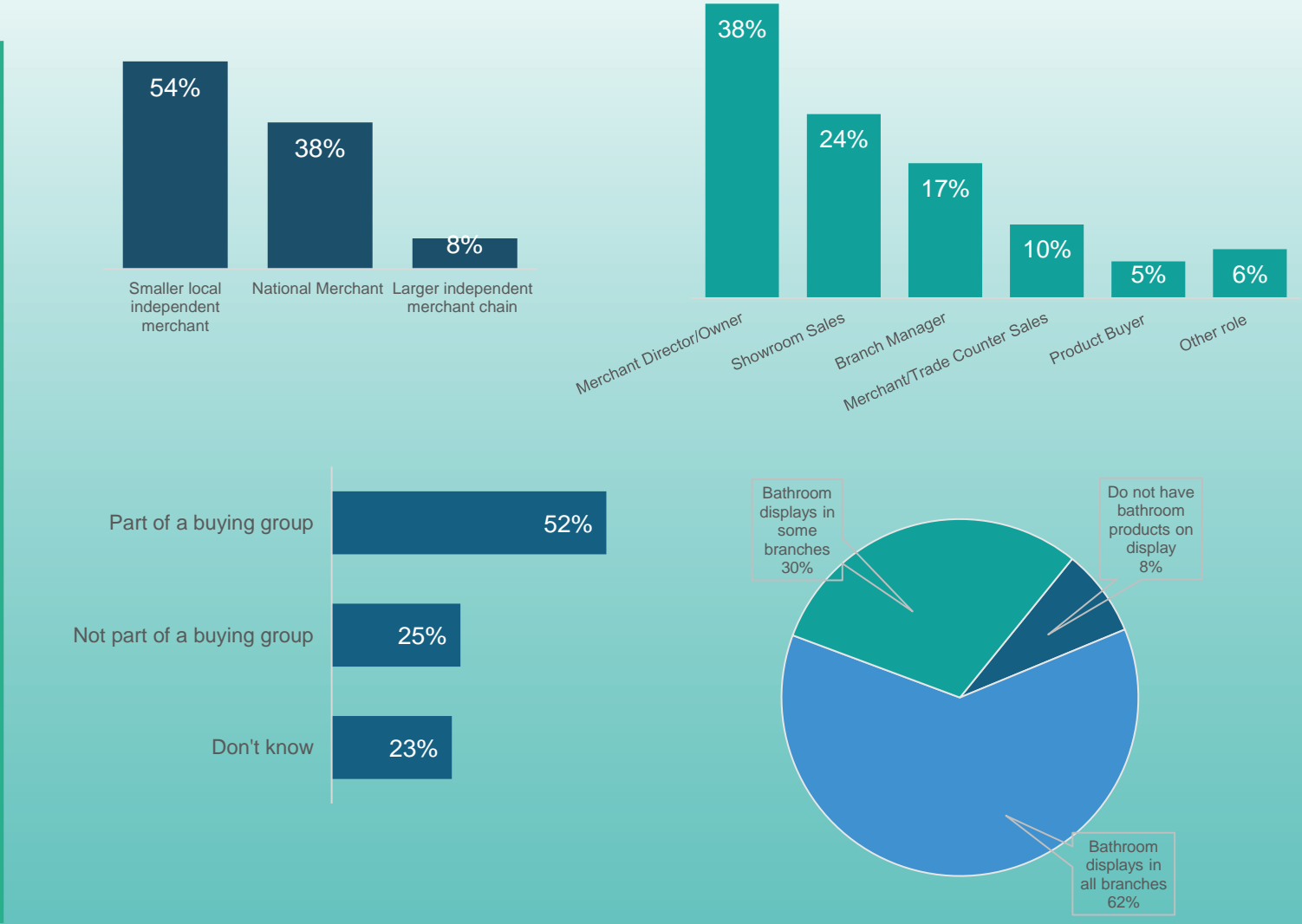
# Survey Demographics



63 employees at merchants responded to the survey



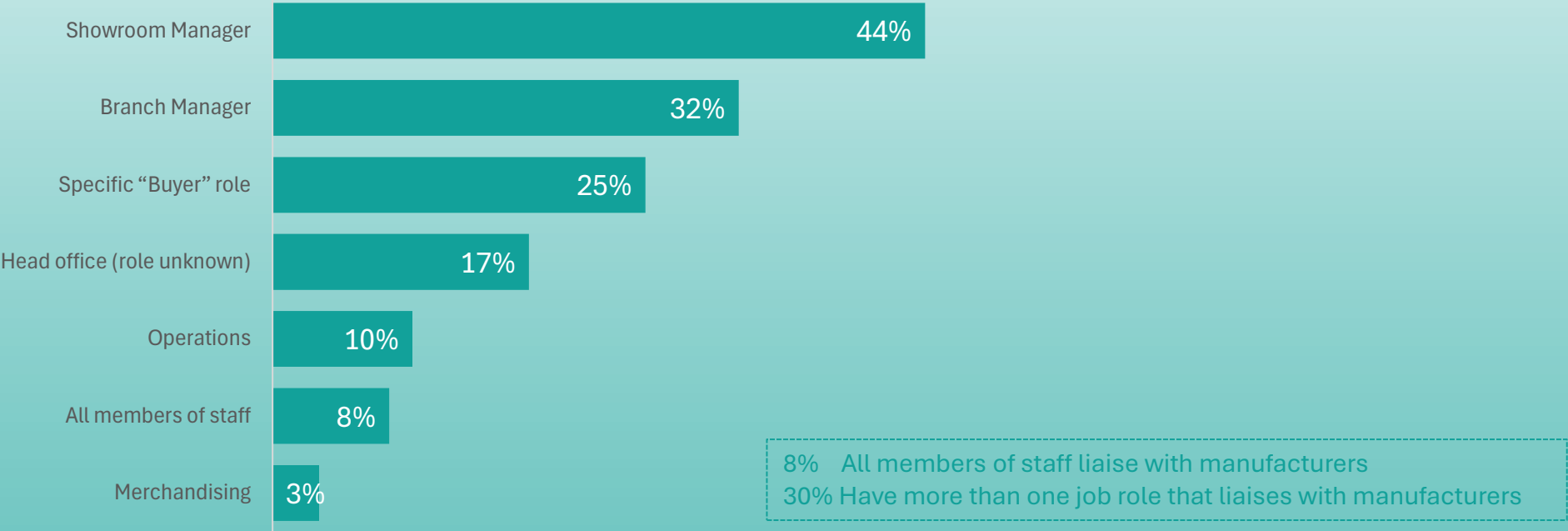
# Merchant Profile



# Q1

Within your company, who is it that liaises with bathroom manufacturers regarding stocking their products?

(Select all options that apply)

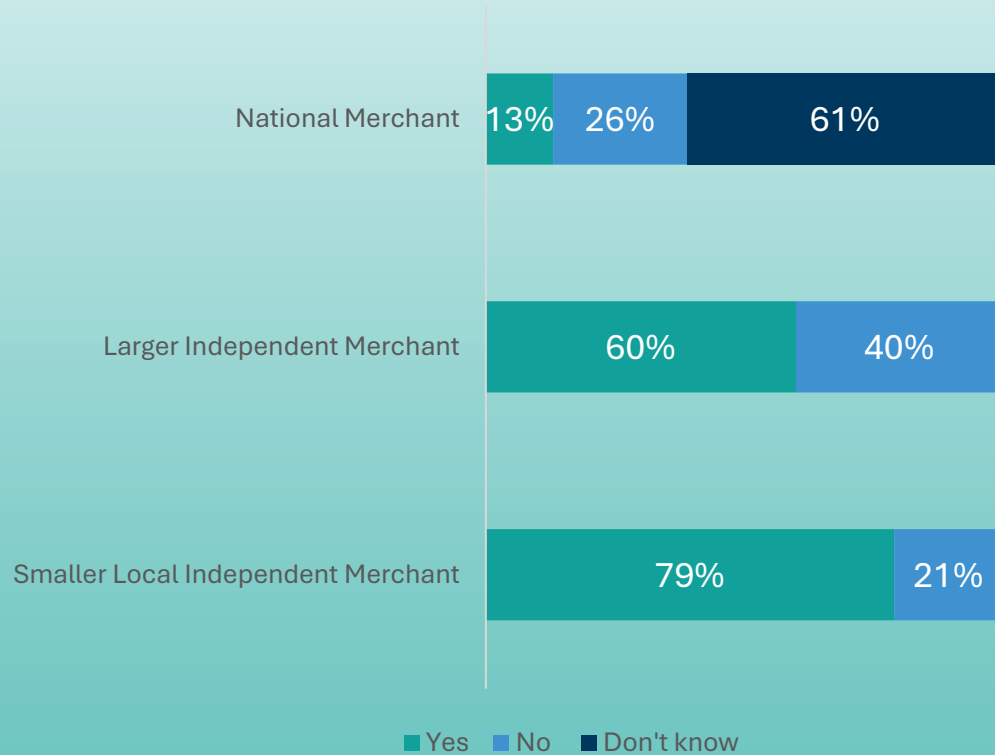


Base: 63 All respondents

Multi-response question - percentage total over 100%

# Q2

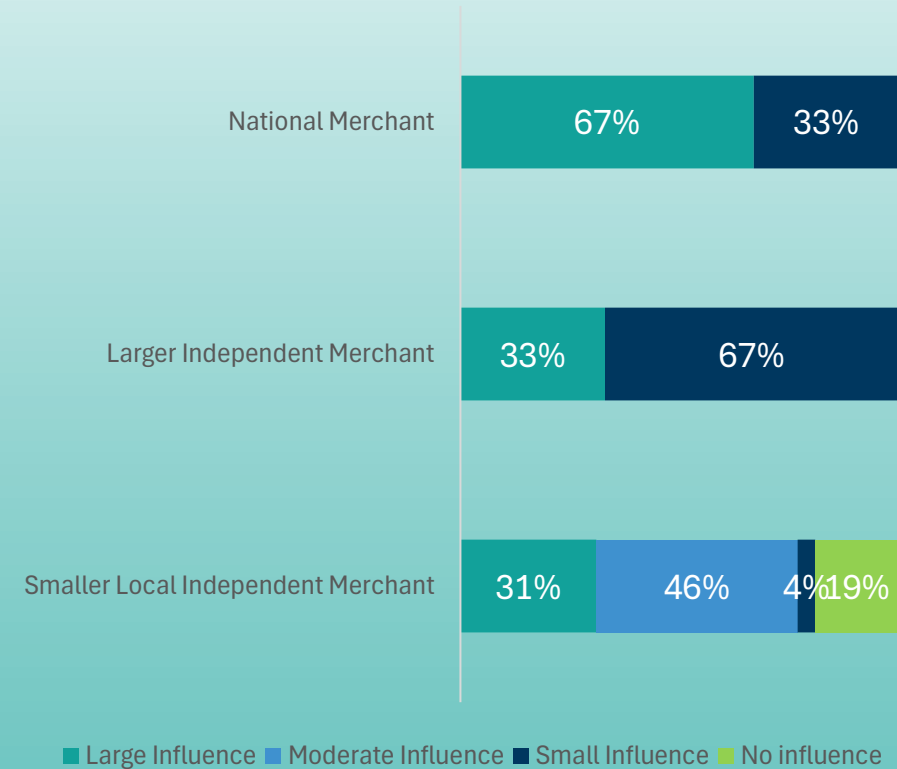
Is your company a part of a buying group for bathroom products (e.g. NBG, IPG, NBMS etc.)?



Base: 63 All Merchants

# Q3

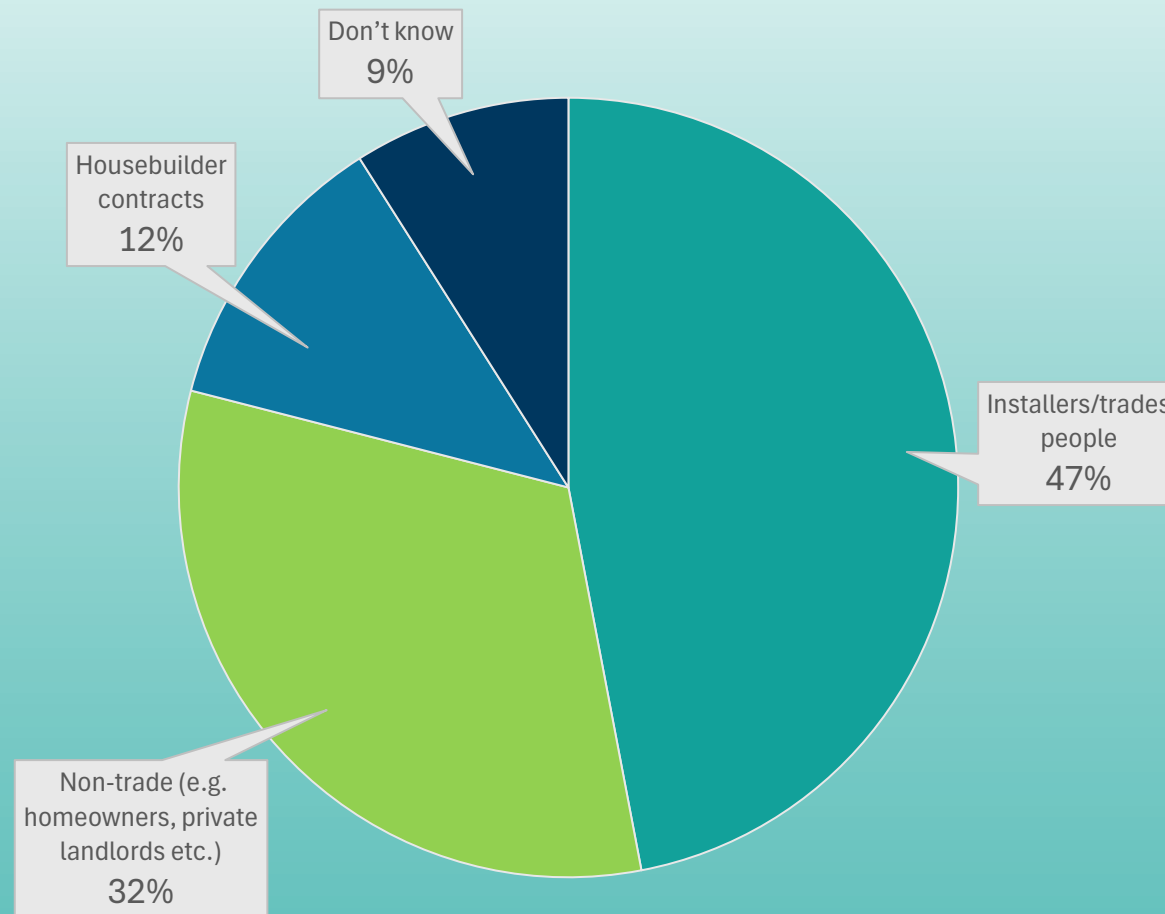
Please consider the buying group that your company is part of. Do they influence which bathroom products you stock/sell?



Base: 32 Merchants who replied yes in Q2

# Q4

What proportion of your branch's sales would you estimate are made by the following, when it comes to bathrooms/bathroom products?

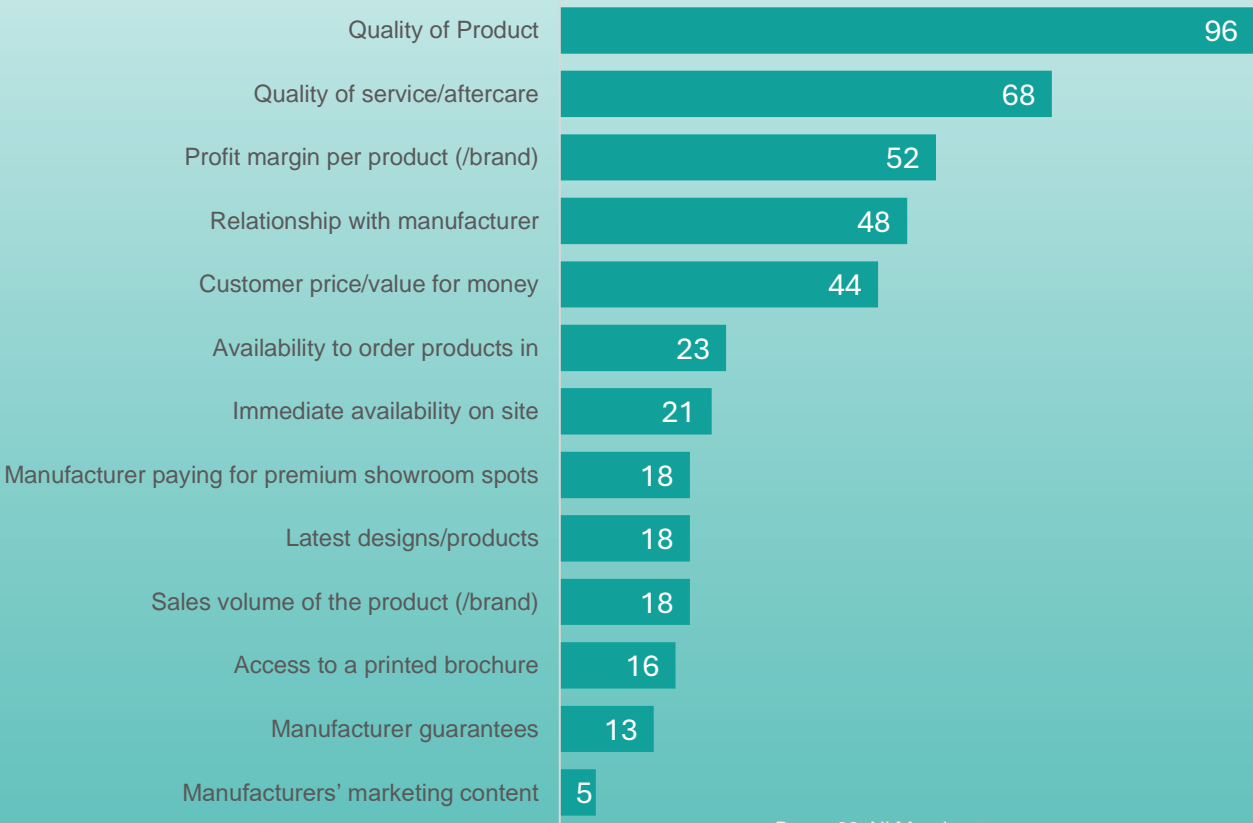


Base: 63 All respondents

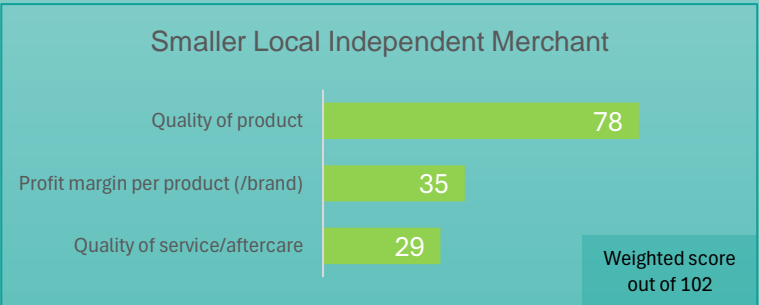
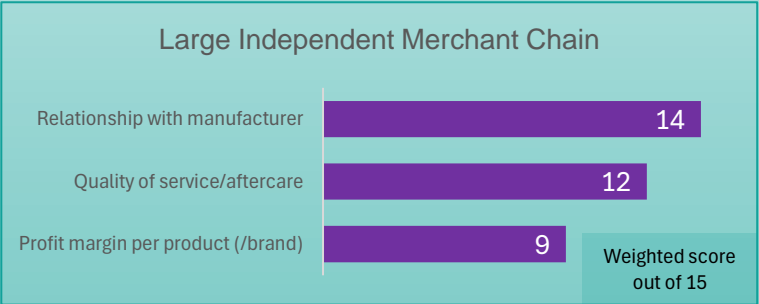
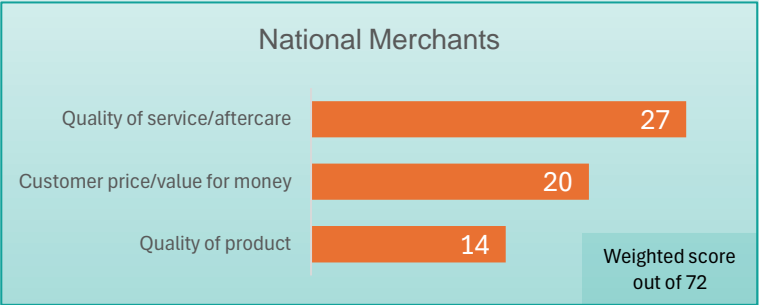
# Q5

## What influences you/your company in deciding which products/brands are given the best display spots in the showroom?

(Please rank your top three, with the most influential as number one)



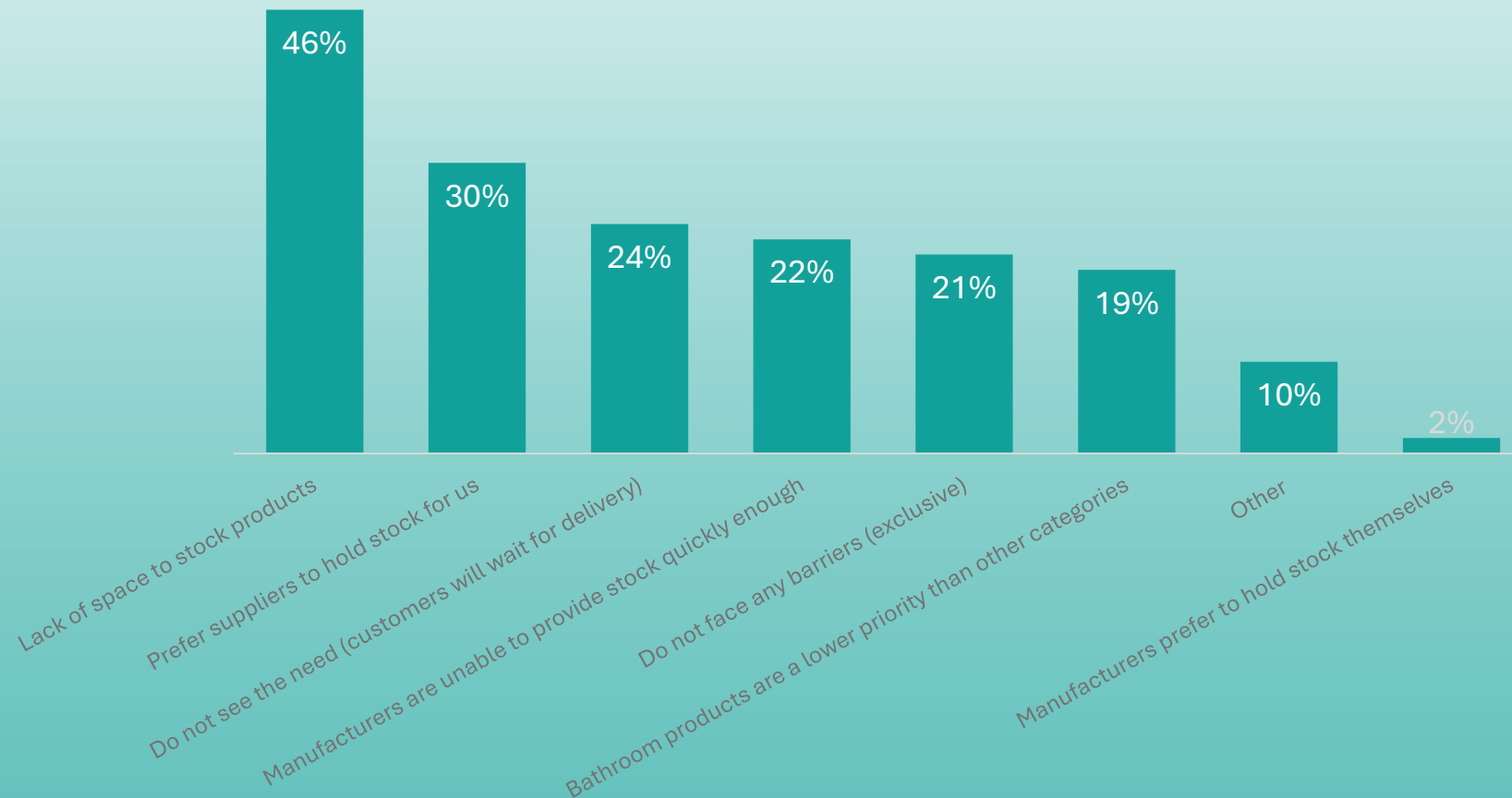
Base: 63 All Merchants  
Weighted score out of 189



# Q6

## What barriers (if any) does your company face when it comes to stocking bathrooms/bathroom products?

(Please tick all options that apply to you)

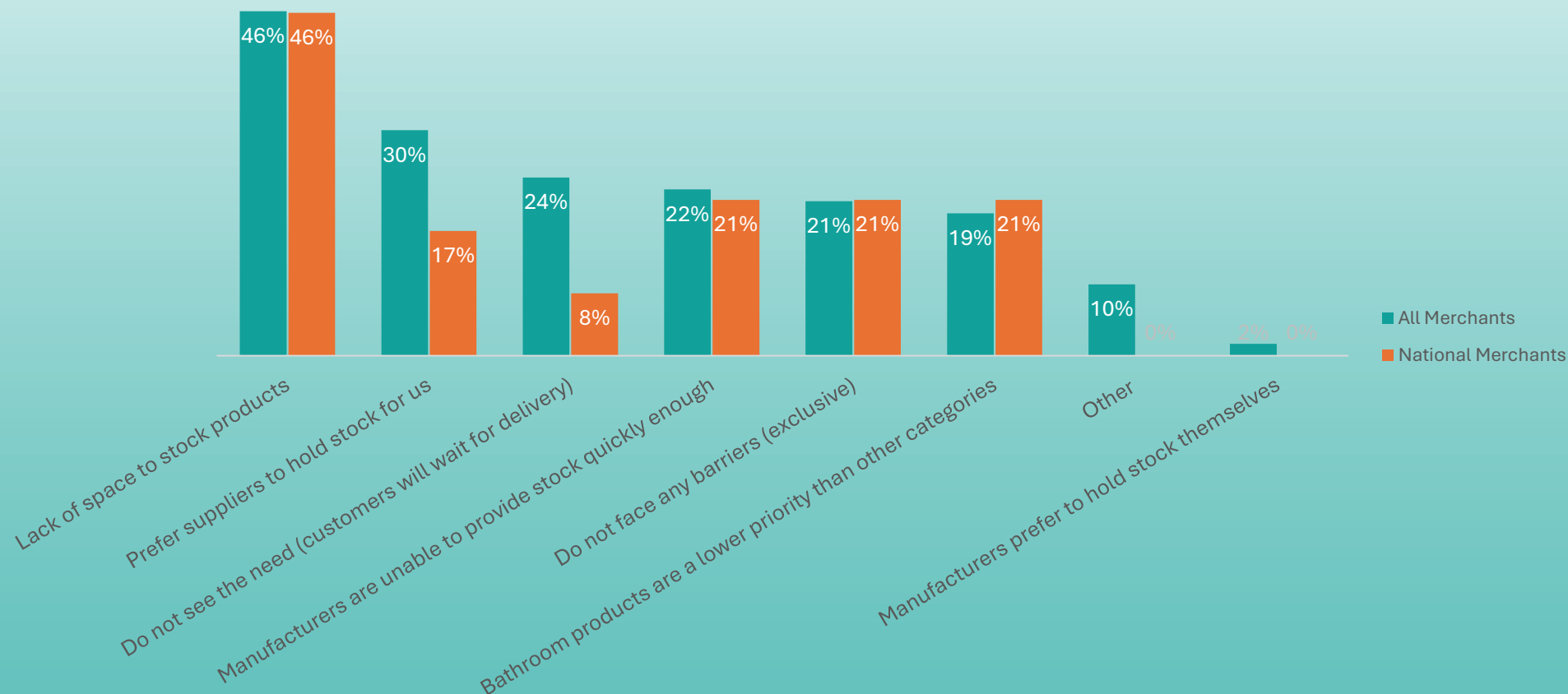


Base: 63 All respondents  
Multi-response question - percentage total over 100%

# Q6a

What barriers (if any) does your company face when it comes to stocking bathrooms/bathroom products?

(Please tick all options that apply to you)

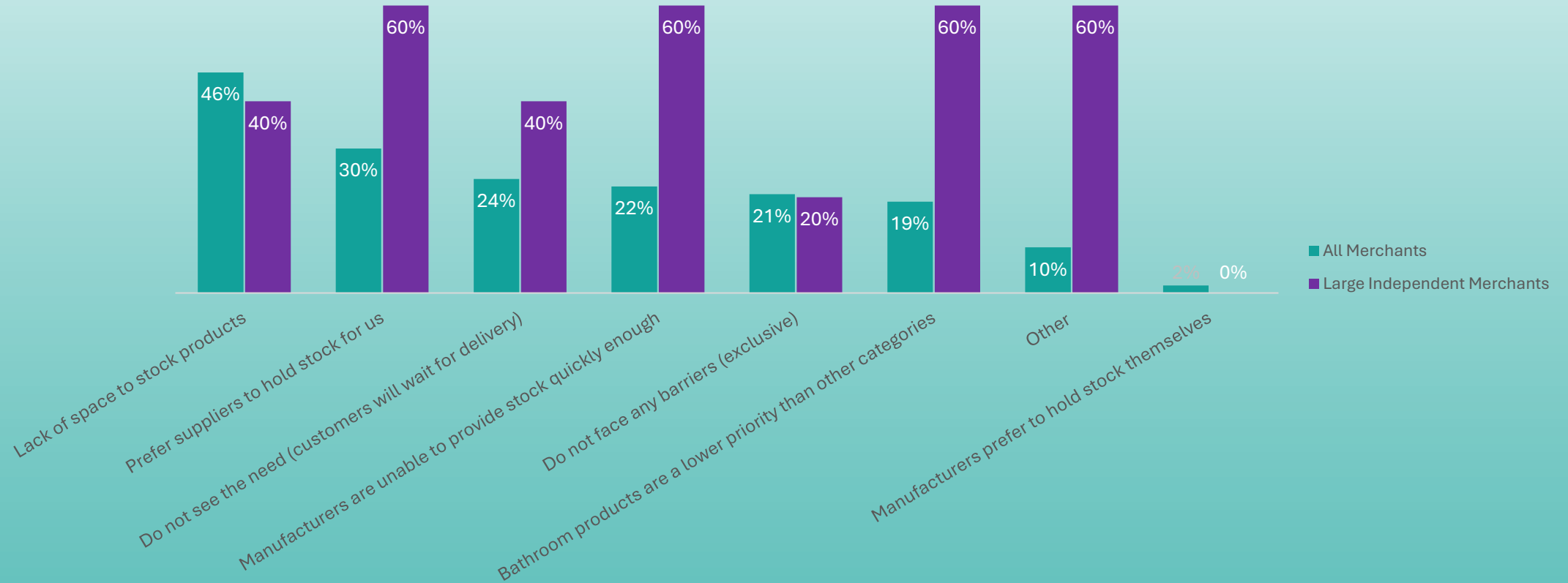


Base: All Merchants v National Merchants

# Q6b

## What barriers (if any) does your company face when it comes to stocking bathrooms/bathroom products?

(Please tick all options that apply to you)



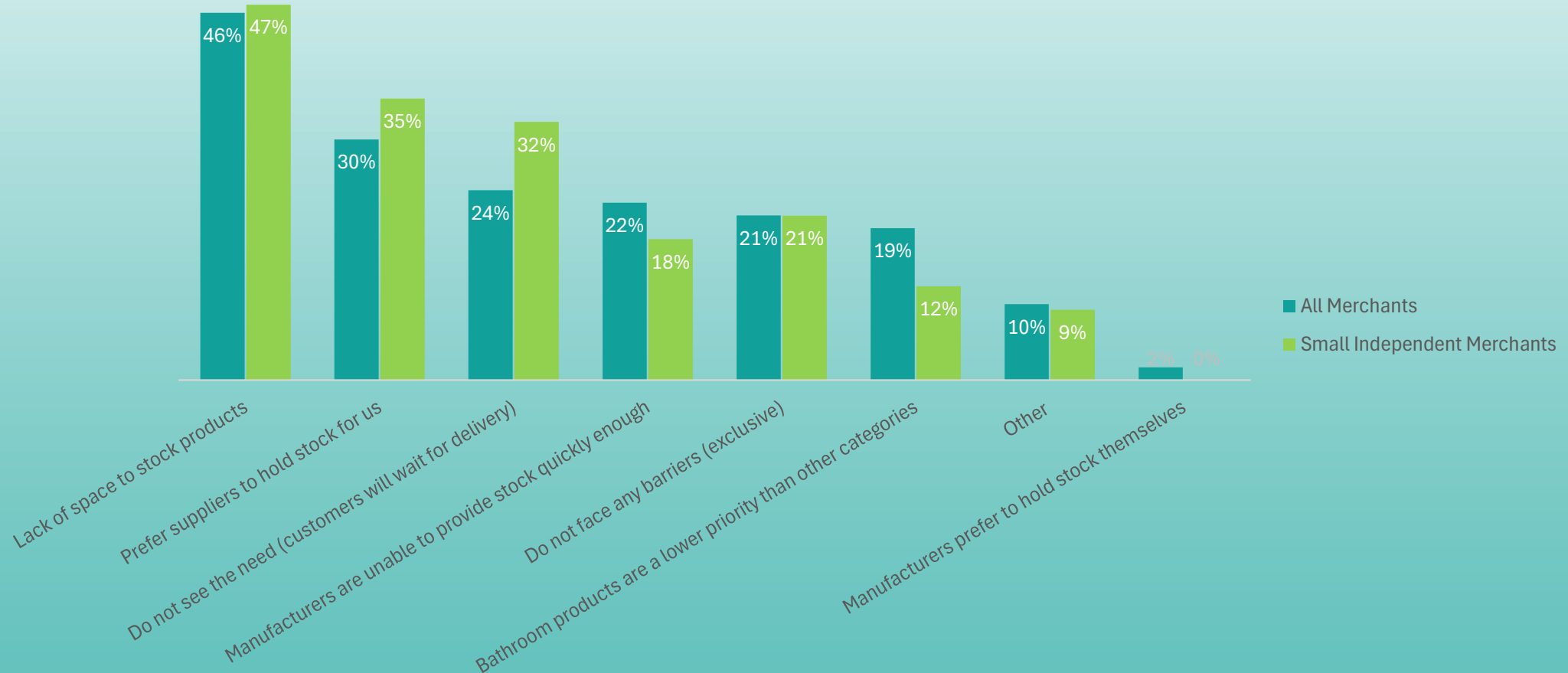
Base: All Merchants v Large Independent Merchants



# Q6c

## What barriers (if any) does your company face when it comes to stocking bathrooms/bathroom products?

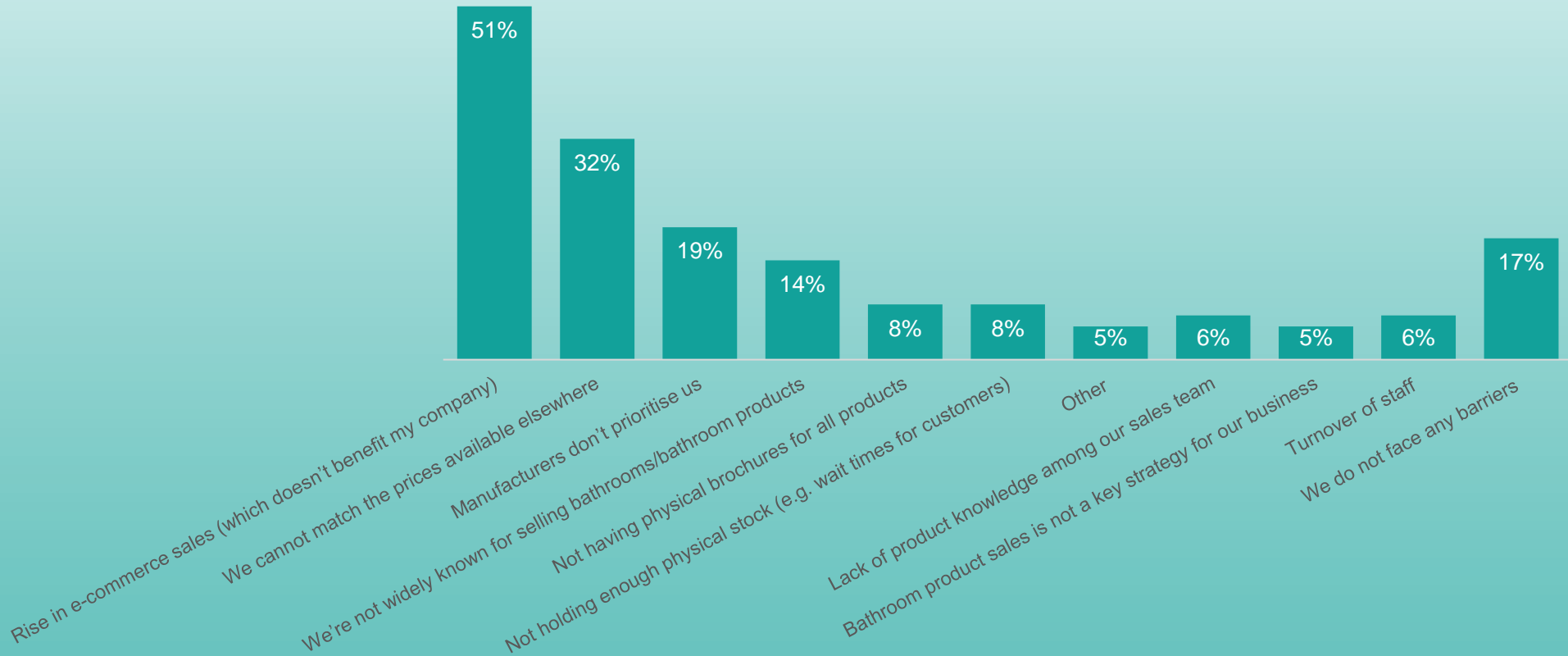
(Please tick all options that apply to you)



Base: All Merchants v Small Independent Merchants

# Q7 | What barriers (if any) are there to your company selling more bathrooms/bathroom products?

(Please tick all options that apply to you)

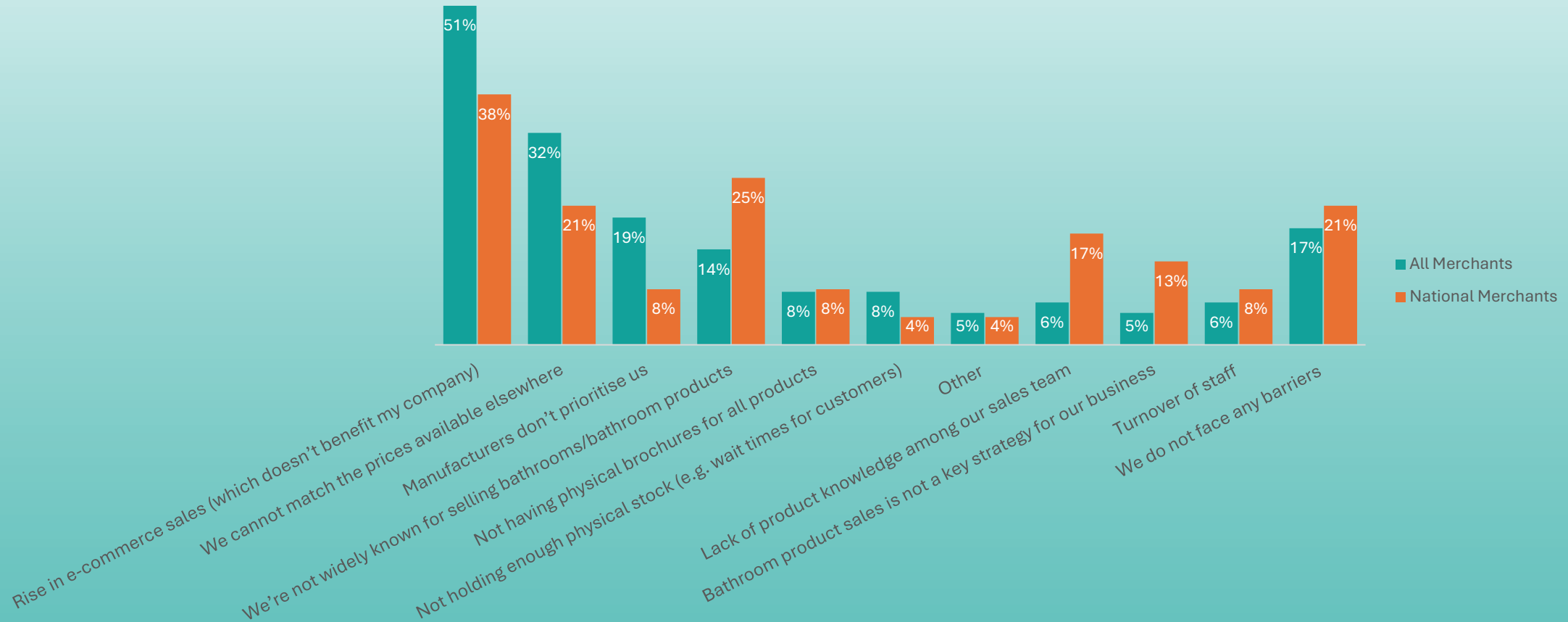


Base: 63 All respondents  
Multi-response question - percentage total over 100%

# Q7a

What barriers (if any) are there to your company selling more bathrooms/bathroom products?

(Please tick all options that apply to you)

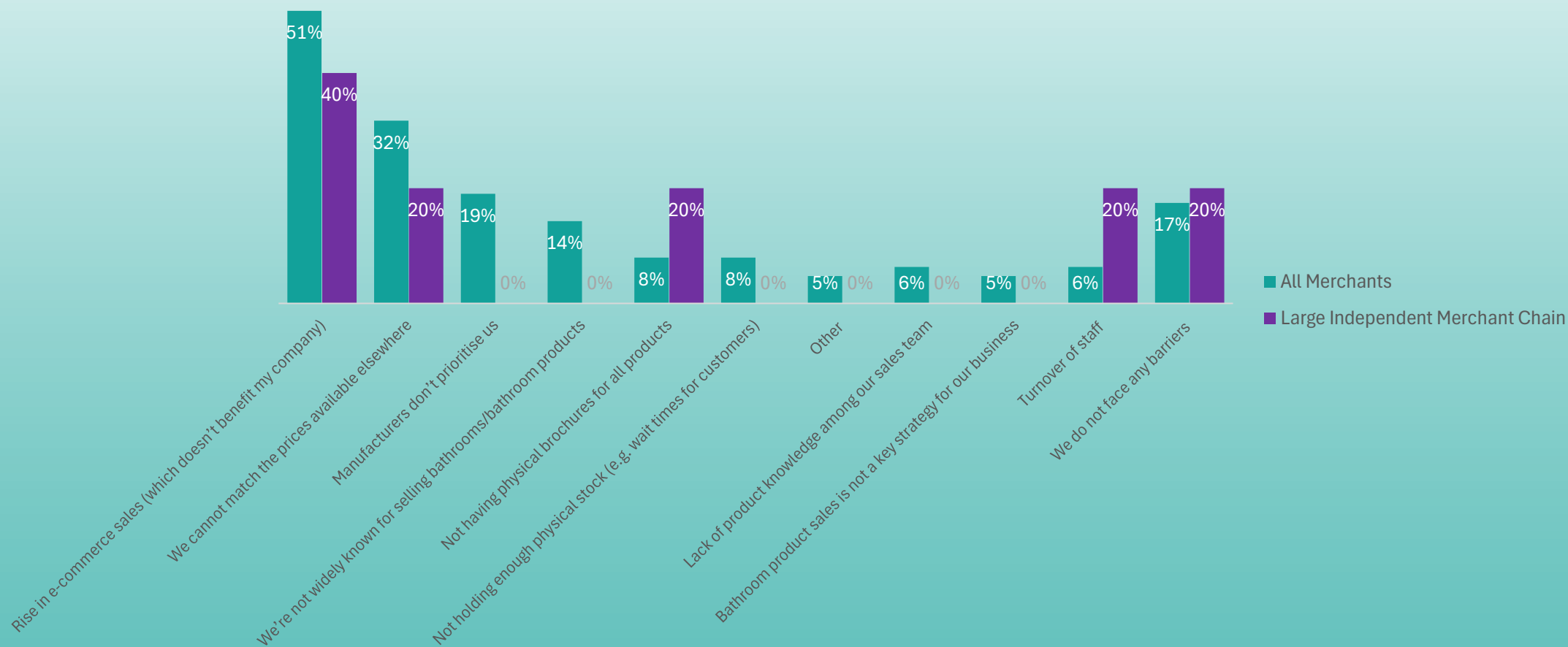


Base: All Merchants v National Merchants

# Q7b

## What barriers (if any) are there to your company selling more bathrooms/bathroom products?

(Please tick all options that apply to you)

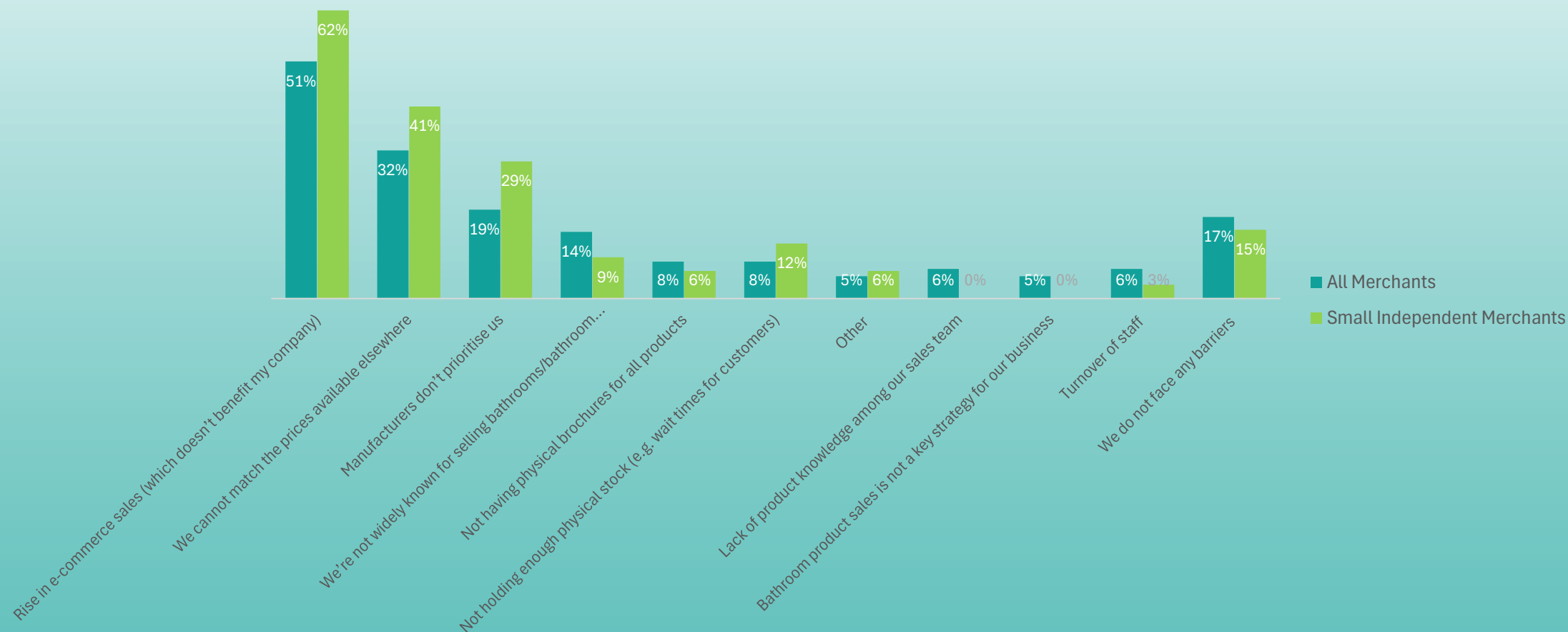


Base: All Merchants v Large Independent Merchant Chain

# Q7c

## What barriers (if any) are there to your company selling more bathrooms/bathroom products?

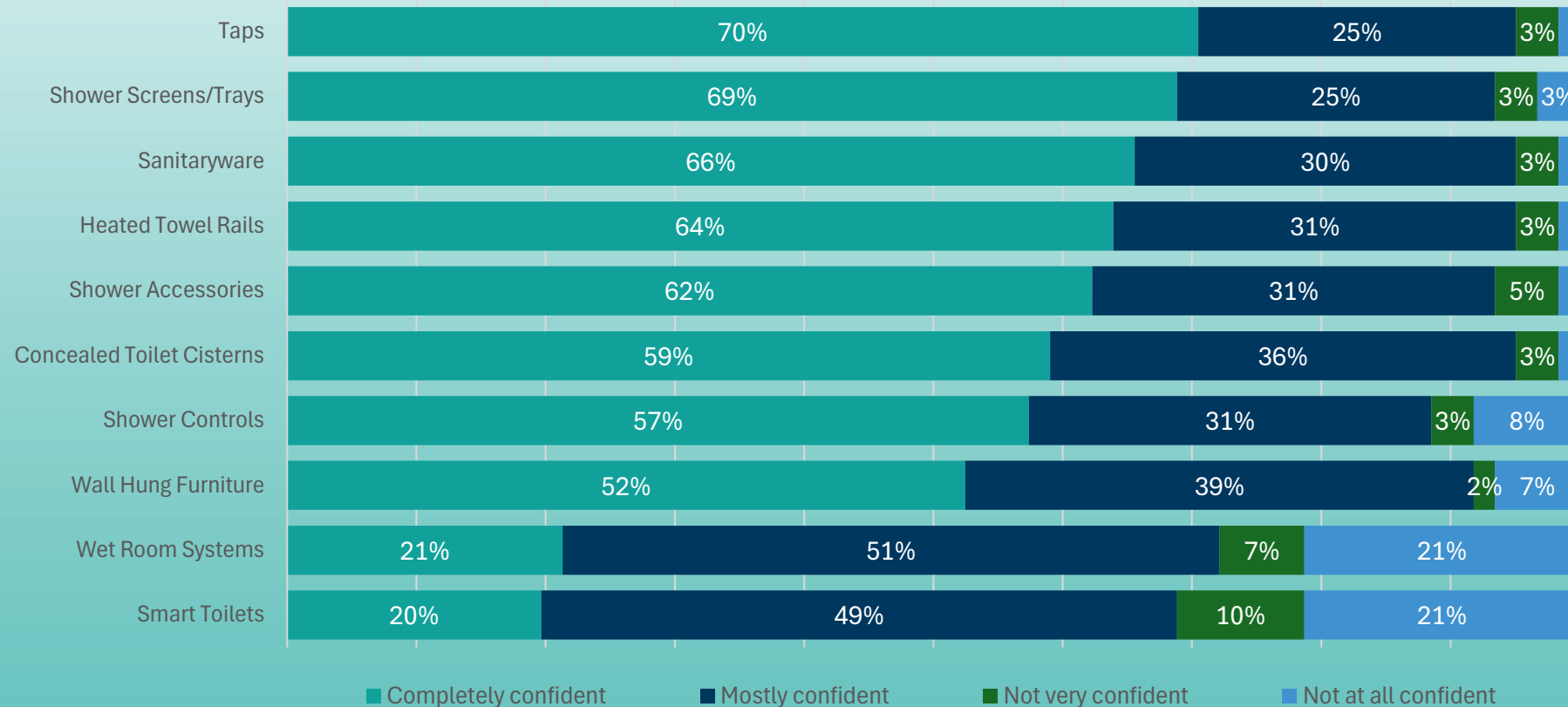
(Please tick all options that apply to you)



Base: All Merchants v Small Independent Merchants

# Q8

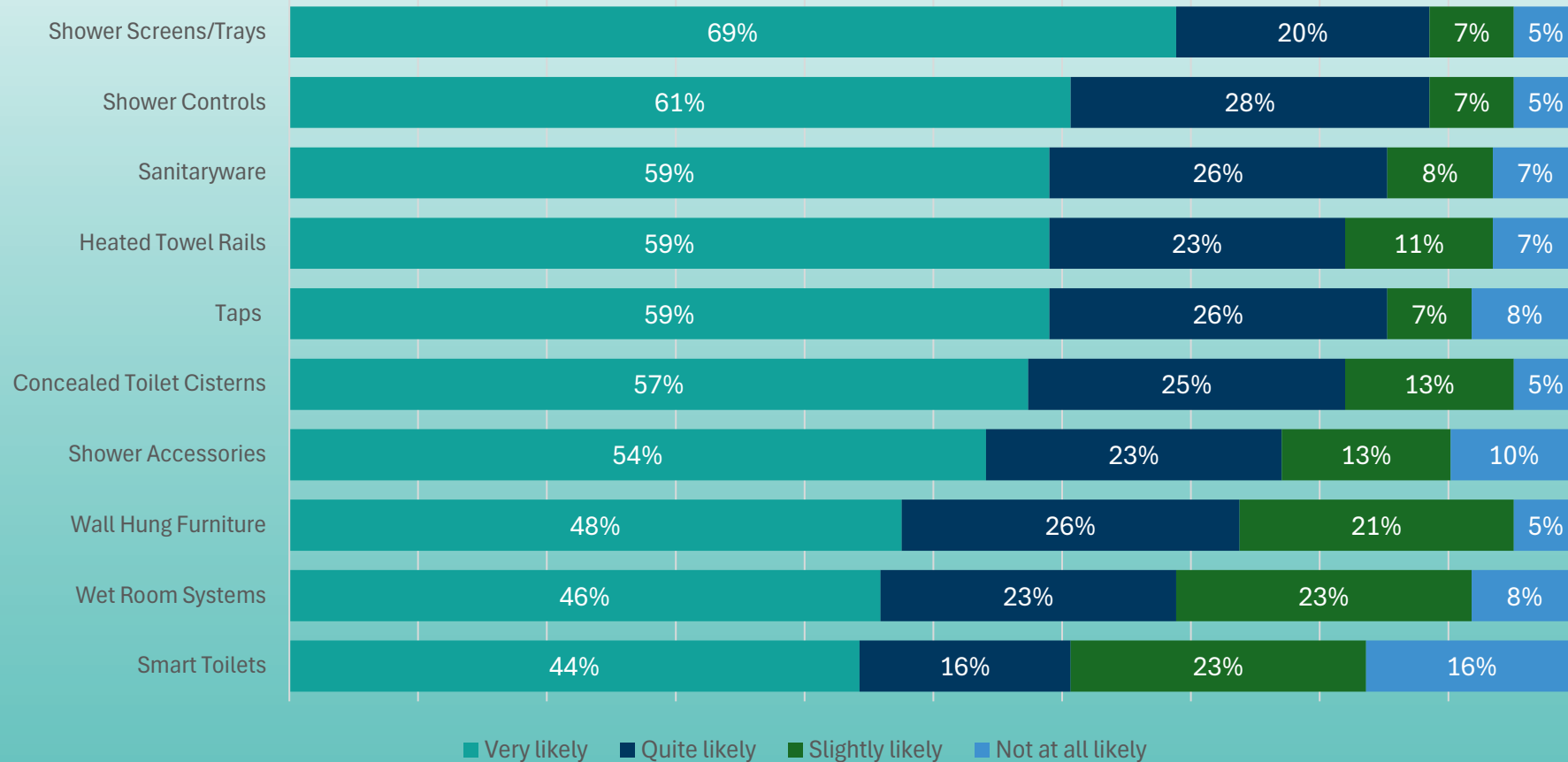
How confident do you personally feel in giving customers (installers and tradespeople) advice related to bathroom products/bathroom brand information?



Base: 63 All Merchants

# Q9

How likely are you to be asked for your advice about the following bathroom products?

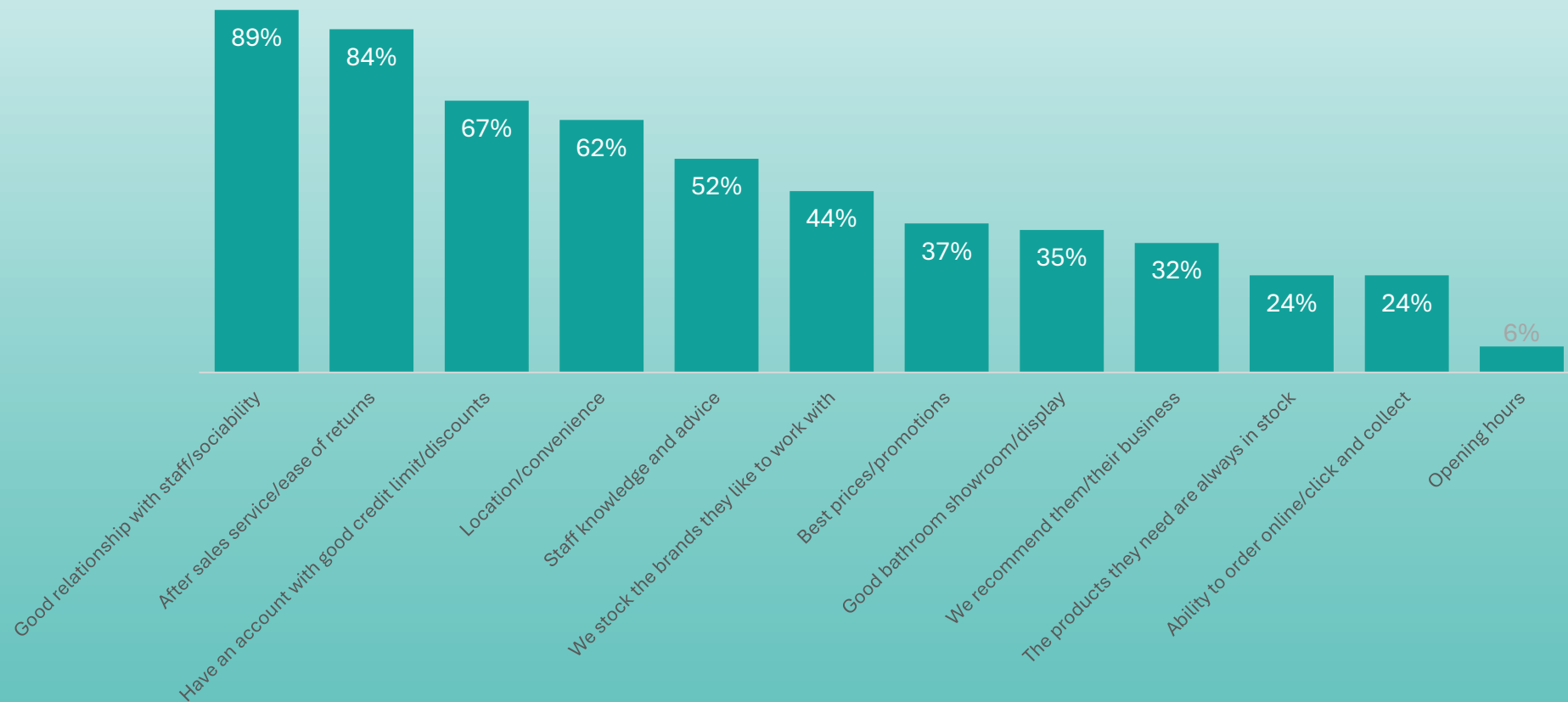


Base: 63 All Merchants

# Q10

## Why do you think installers and tradespeople purchase bathroom products from your company/branch?

(Please tick all options that apply to you)



Base: 63 All respondents

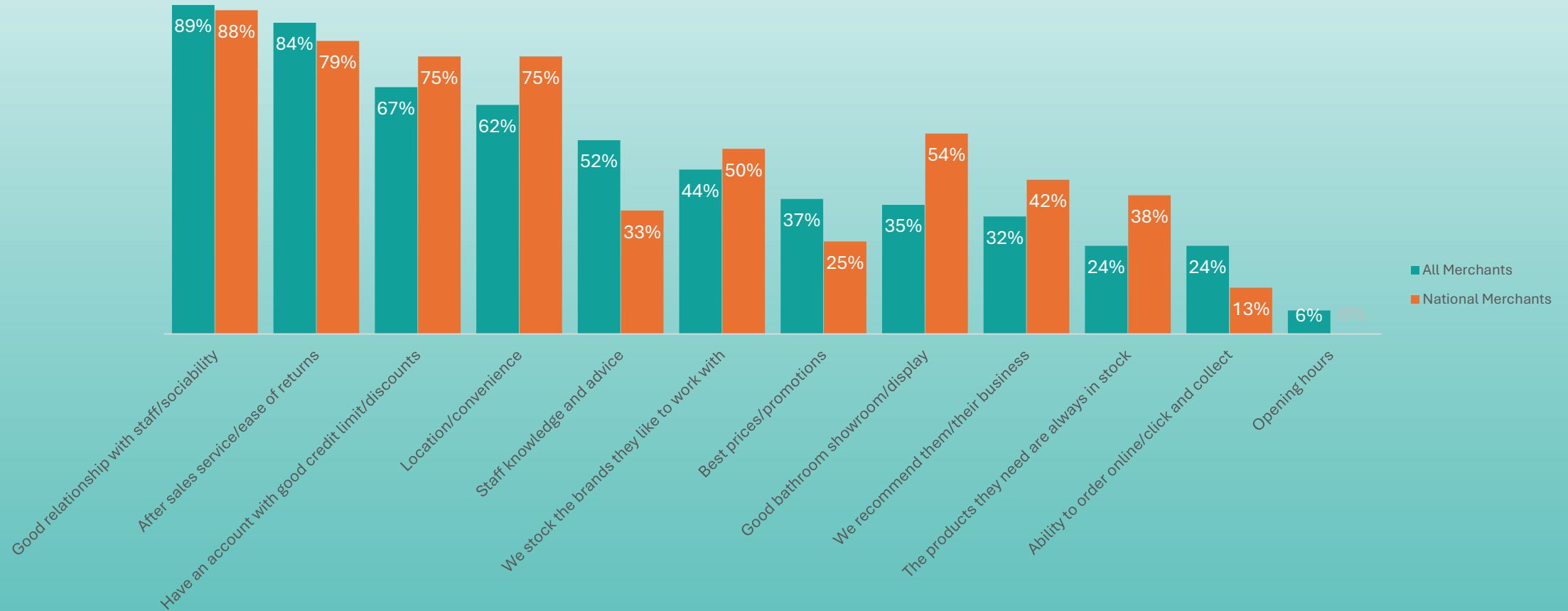
Multi-response question - percentage total over 100%



# Q10a

## Why do you think installers and tradespeople purchase bathroom products from your company/branch?

(Please tick all options that apply to you)

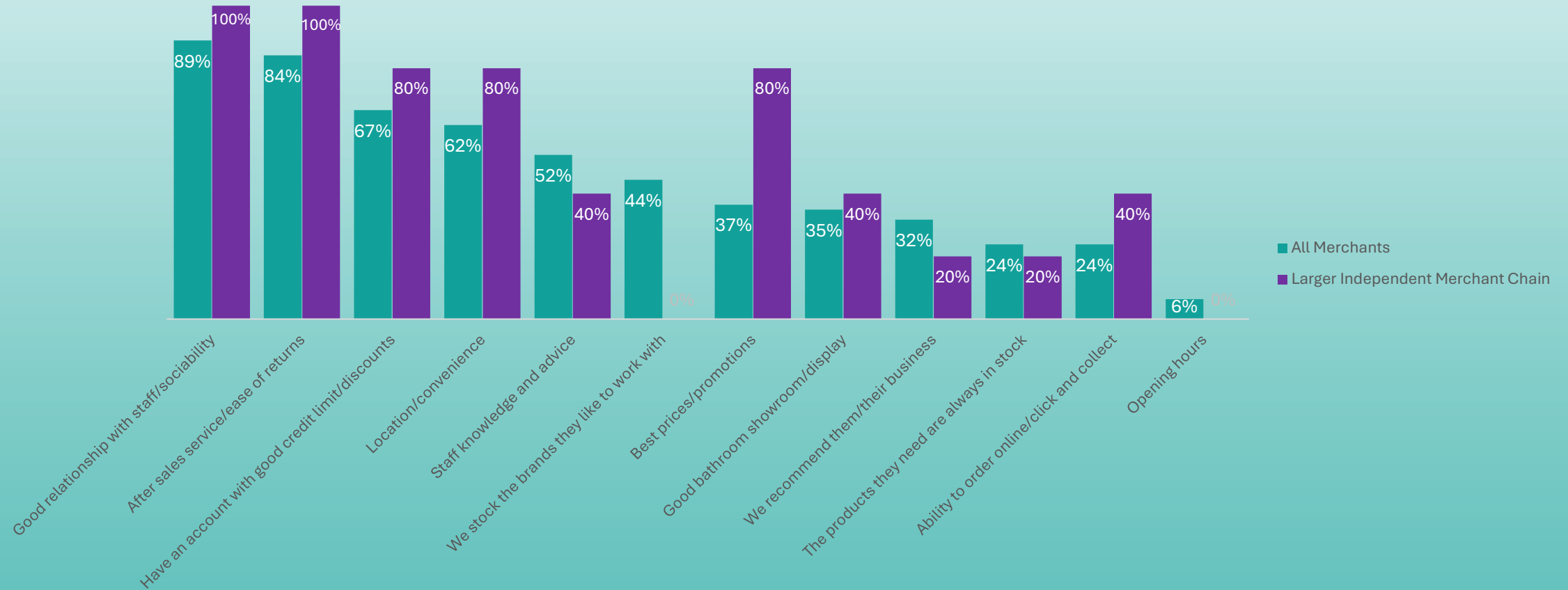


Base: All Merchants v National Merchants

# Q10b

Why do you think installers and tradespeople purchase bathroom products from your company/branch?

(Please tick all options that apply to you)

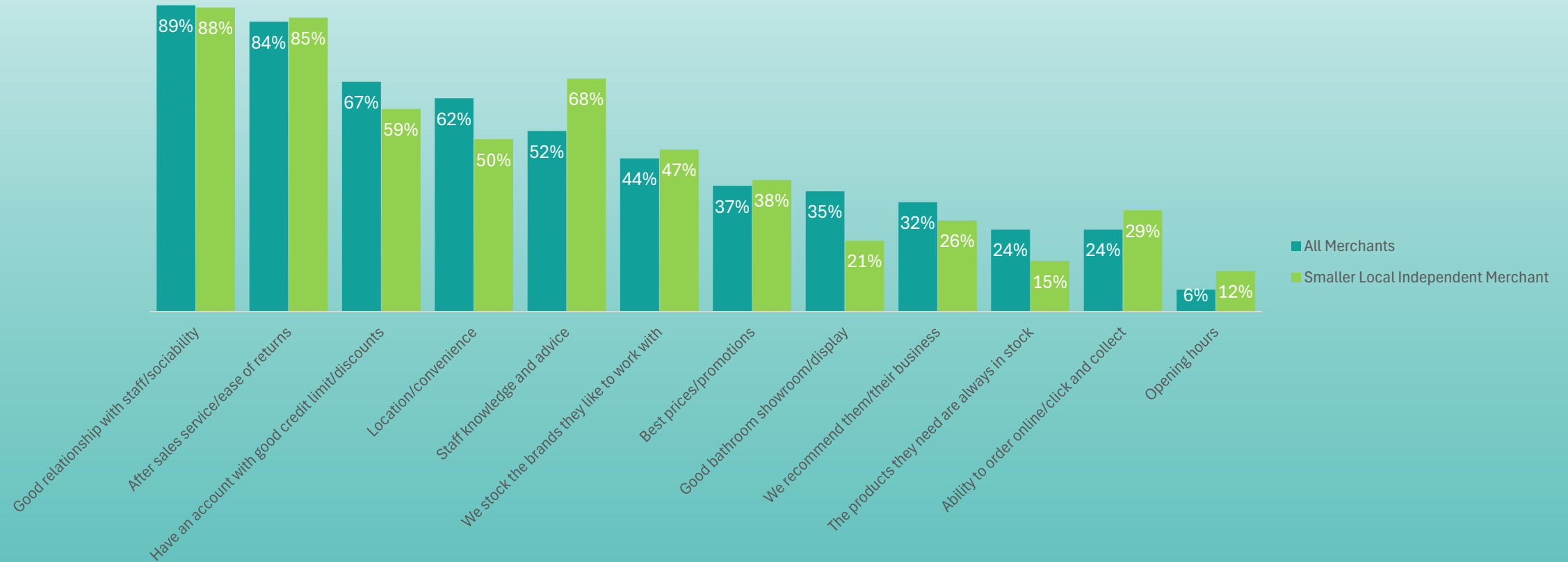


Base: All Merchants vs Large Independent Merchant Chains

# Q10c

## Why do you think installers and tradespeople purchase bathroom products from your company/branch?

(Please tick all options that apply to you)

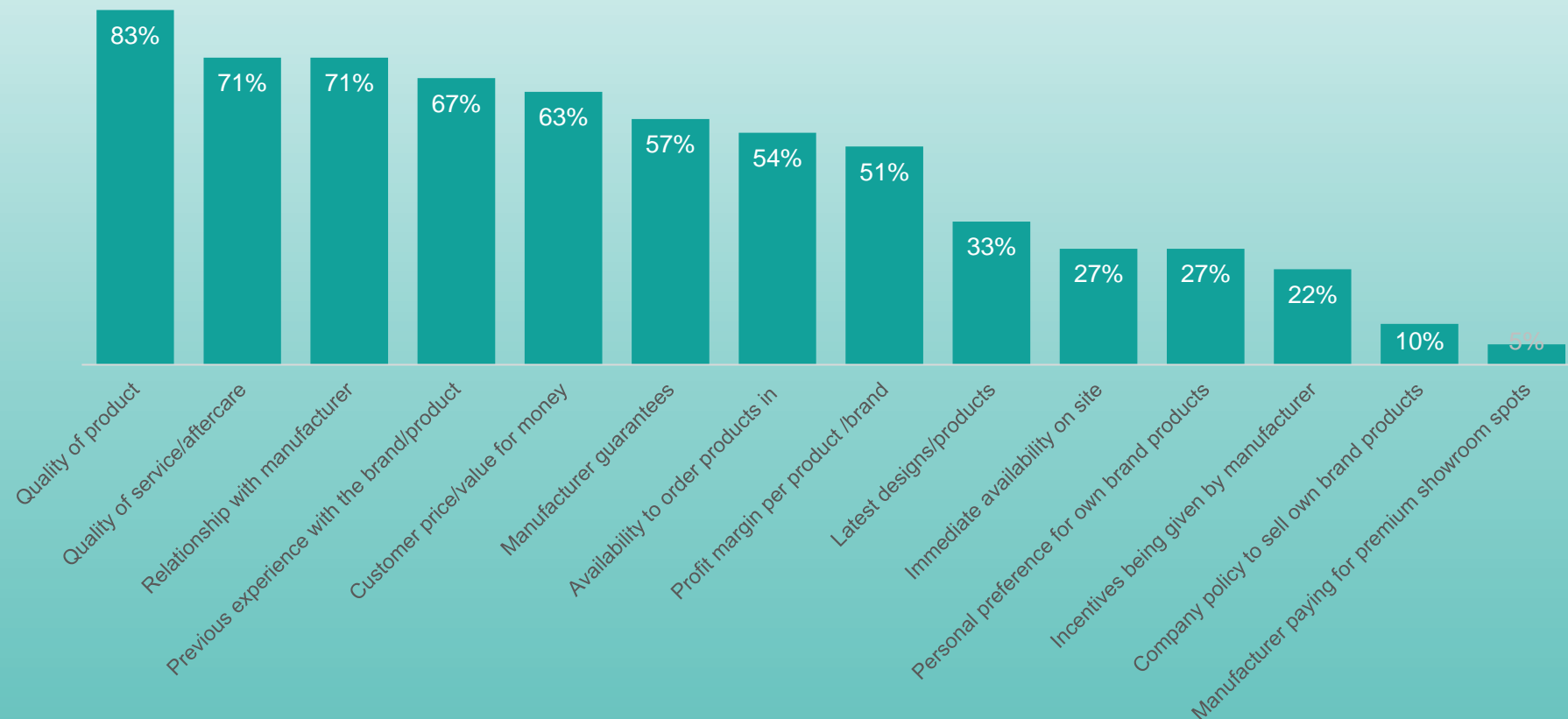


Base: All Merchants v Small Local Independent Merchants

# Q11

What influences whether you/your company would recommend a particular bathroom/bathroom product supplier to a customer (installers and tradespeople)?

(Please tick all options that apply to you)

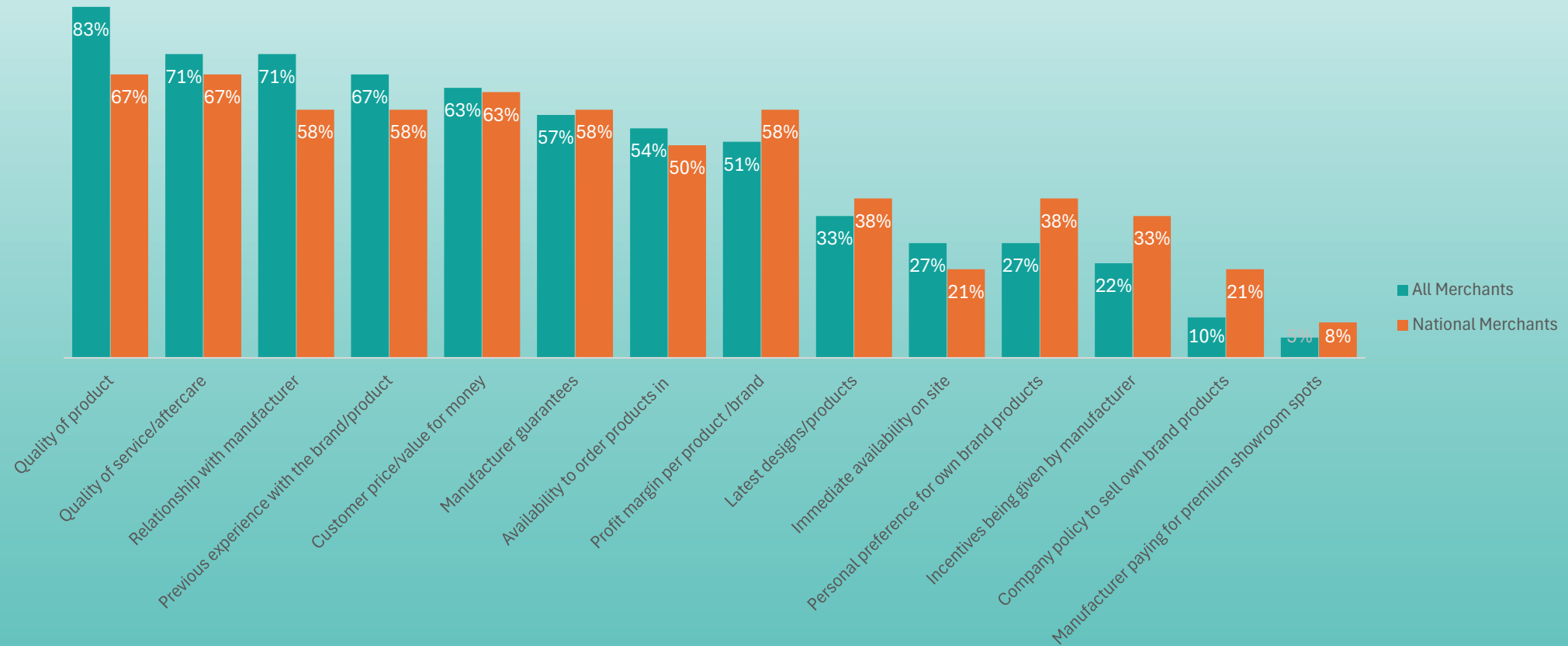


Base: 63 All respondents  
Multi-response question - percentage total over 100%

# Q11a

What influences whether you/your company would recommend a particular bathroom/bathroom product supplier to a customer (installers and tradespeople)?

(Please tick all options that apply to you)

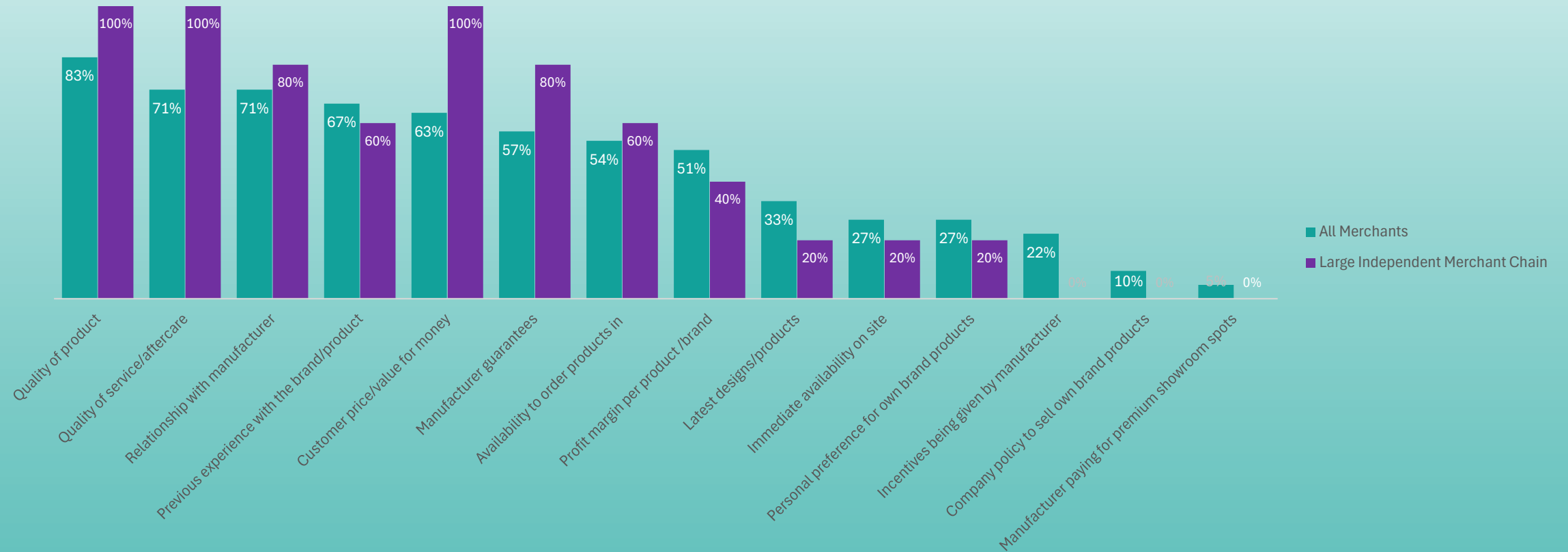


All Merchants vs National Merchants

# Q11b

What influences whether you/your company would recommend a particular bathroom/bathroom product supplier to a customer (installers and tradespeople)?

(Please tick all options that apply to you)

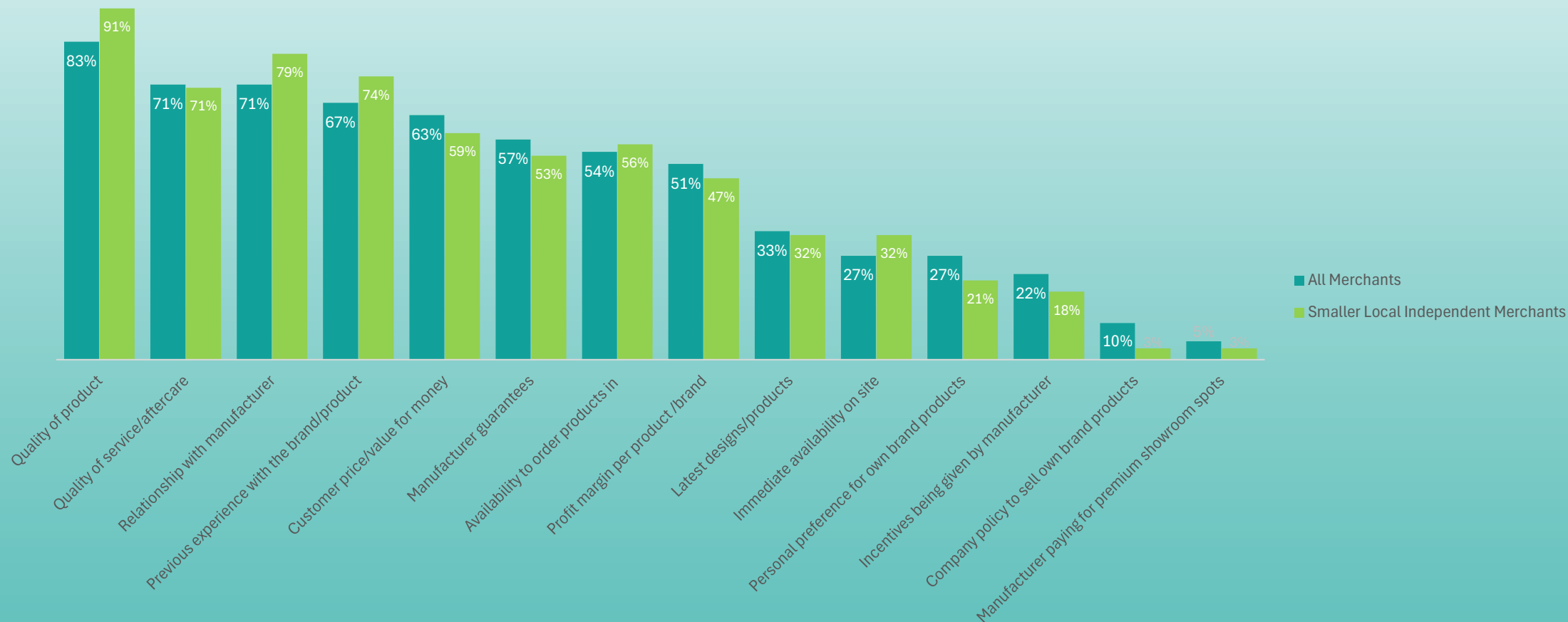


All Merchants vs Large Independent Merchant Chains

# Q11c

What influences whether you/your company would recommend a particular bathroom/bathroom product supplier to a customer (installers and tradespeople)?

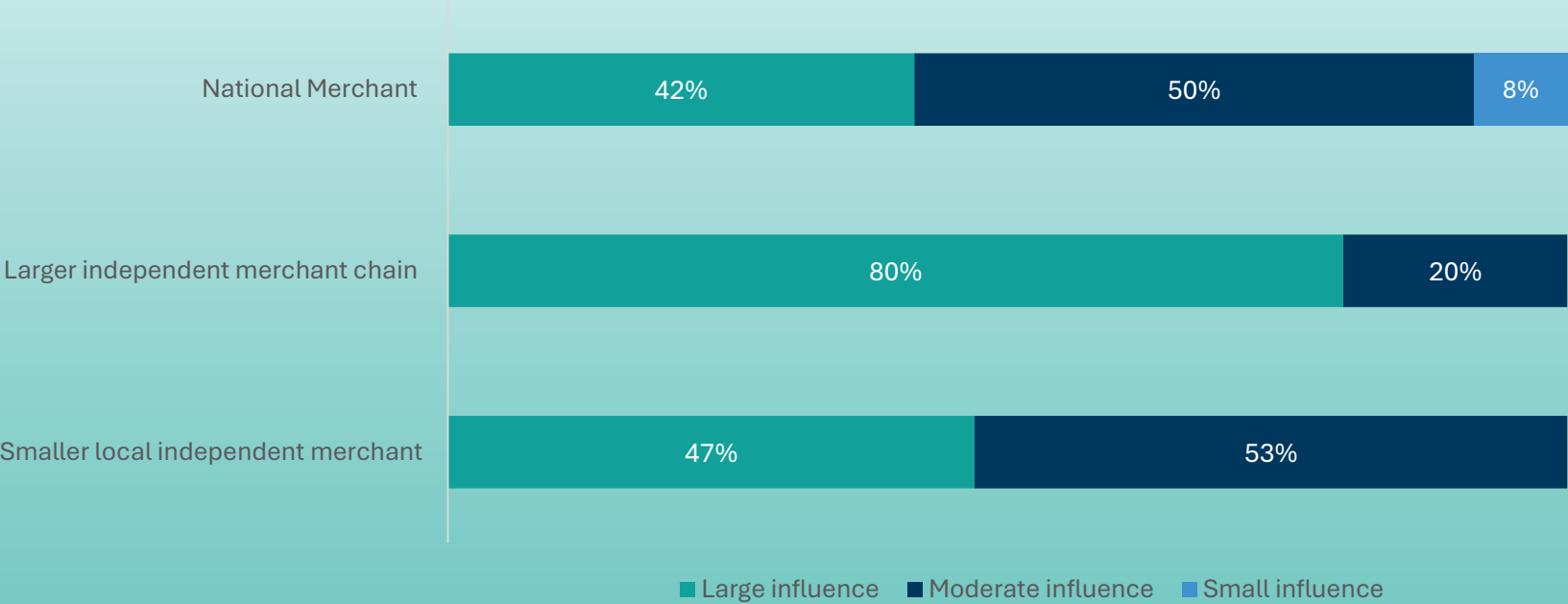
(Please tick all options that apply to you)



All Merchants vs Smaller Local Independent Merchants

# Q12

As the merchant, how much influence do you believe you have on your customers' (installers and tradespeople) purchasing decisions related to bathrooms/bathroom products?

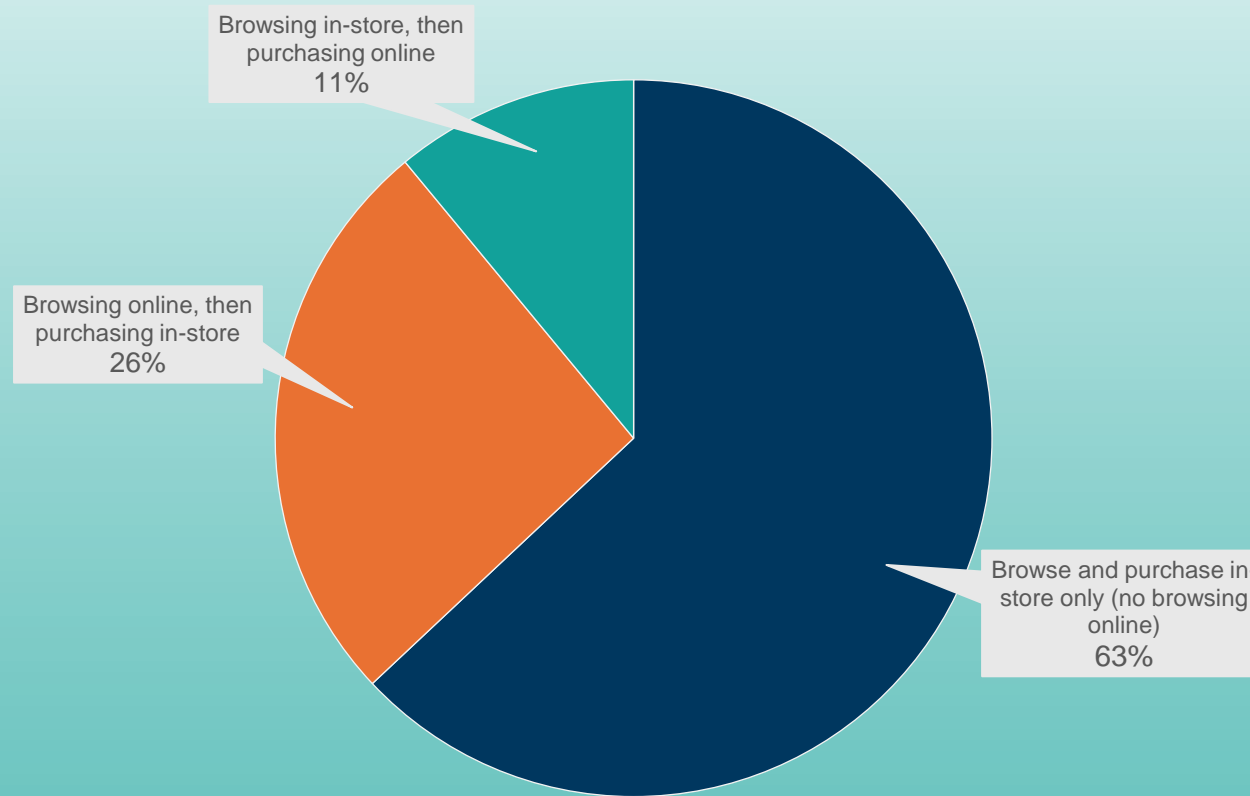


Base: 63 All respondents



# Q13

Thinking about how your customers (installers and tradespeople) purchase bathroom products, are you able to estimate often the following customer purchase processes take place, when it comes to bathrooms/bathroom products?



Base: 63 All respondents

National Merchants reported more customer browsing in store then purchasing online (14%)

Larger independents reported more customers browsing online then purchasing in-store (34%)

The smaller independents reported more customers both browsing and purchasing instore (65%)

# Q14

Which of the following elements of sustainability are important to you when recommending a particular product or brand to a customer?

(Please tick all options that apply to you)

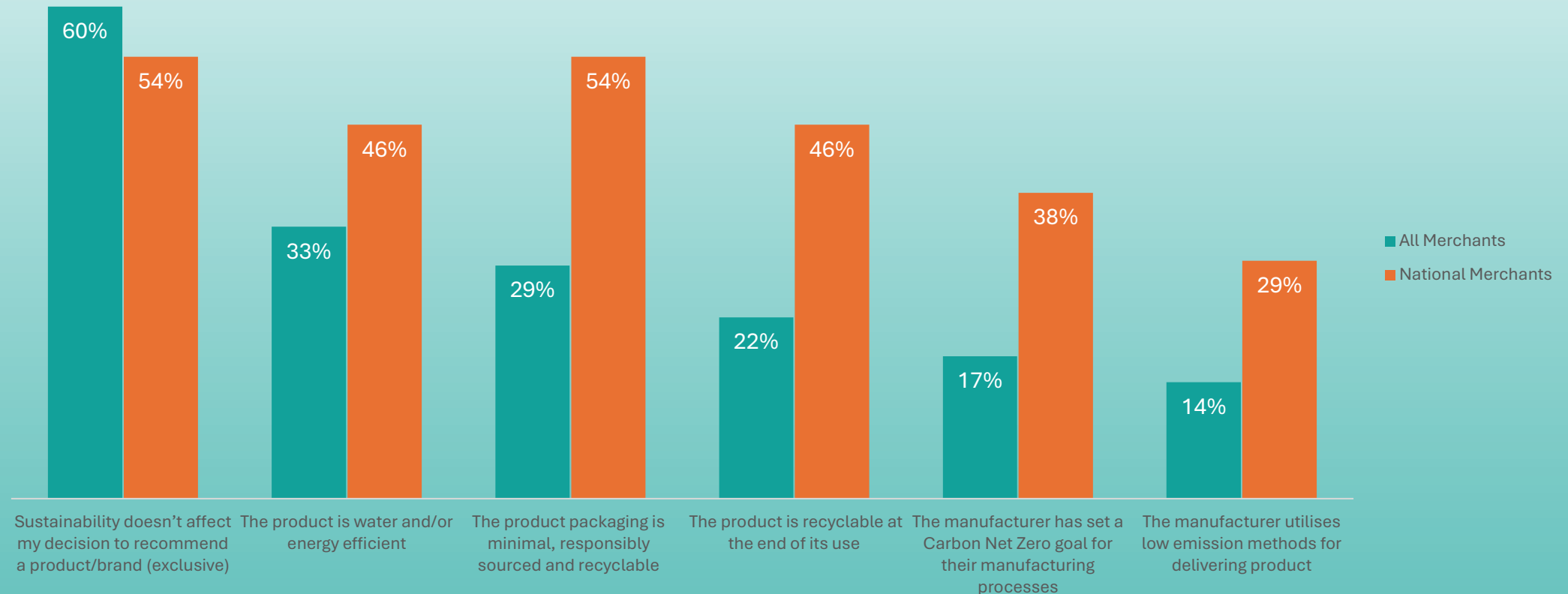


Base: 63 All respondents  
Multi-response question - percentage total over 100%

# Q14a

Which of the following elements of sustainability are important to you when recommending a particular product or brand to a customer?

(Please tick all options that apply to you)

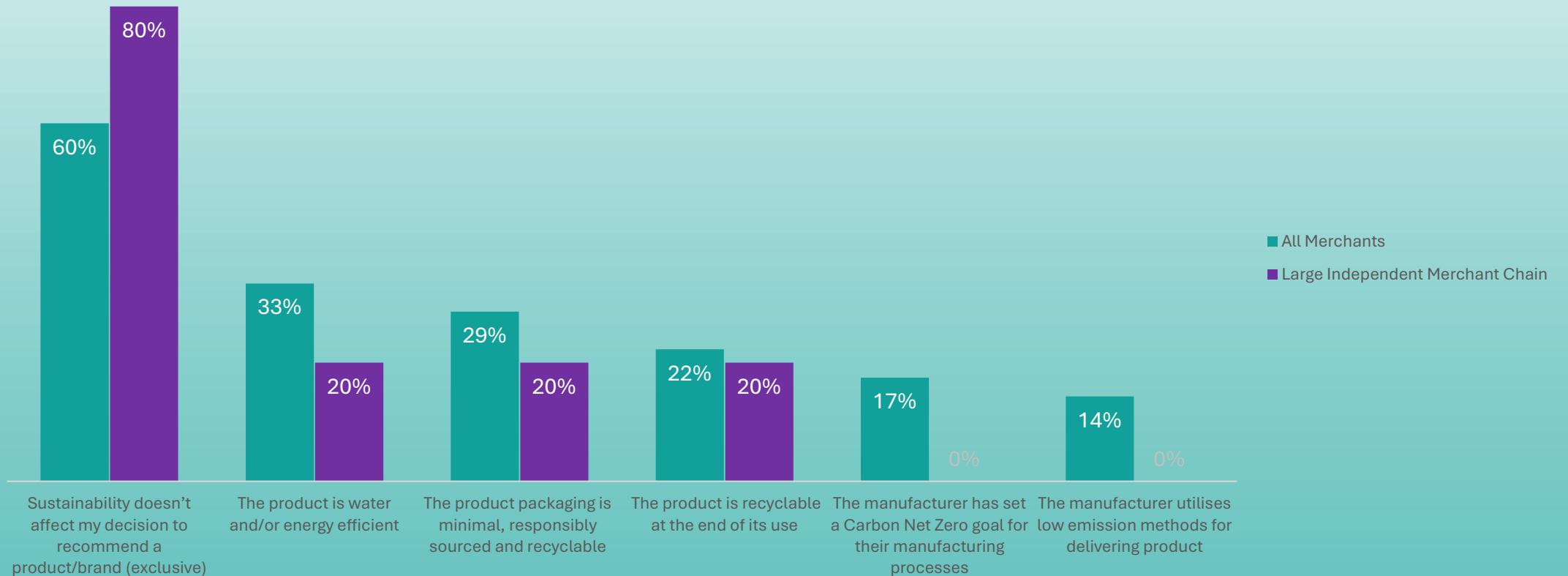


Base: All Merchants vs National Merchants

# Q14b

Which of the following elements of sustainability are important to you when recommending a particular product or brand to a customer?

(Please tick all options that apply to you)

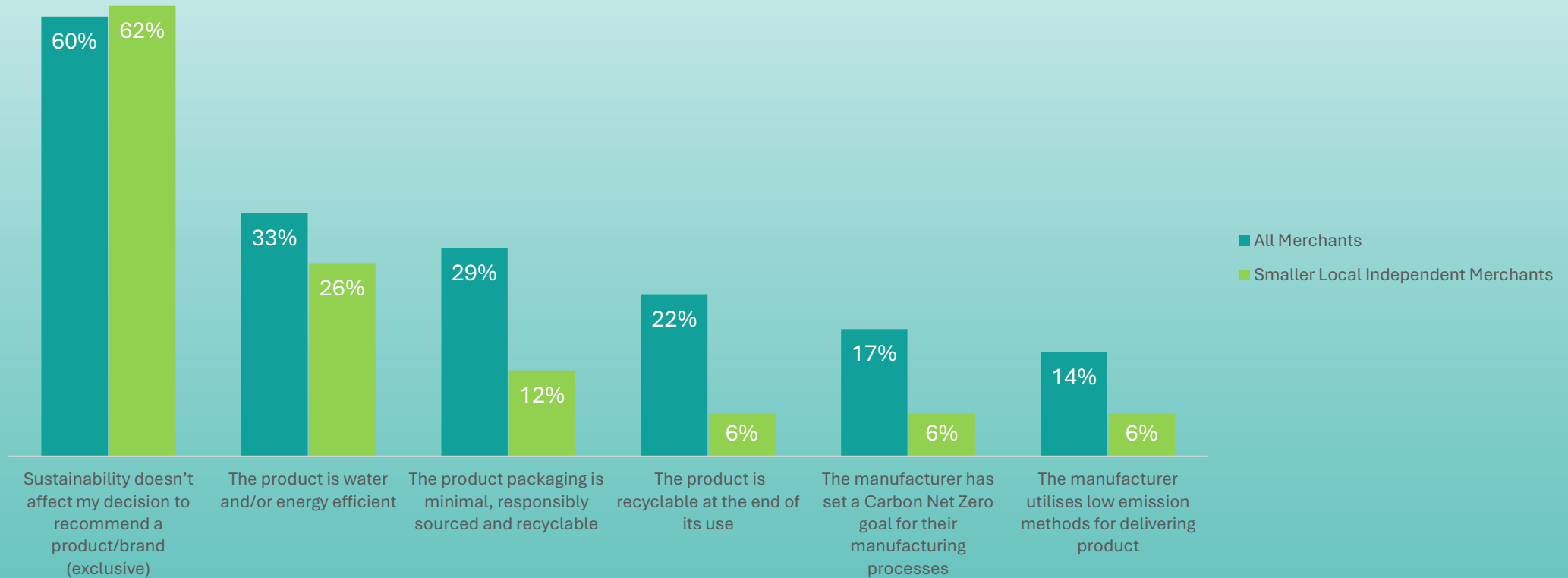


Base: All Merchants vs Large Independent Merchant Chains

# Q14c

Which of the following elements of sustainability are important to you when recommending a particular product or brand to a customer?

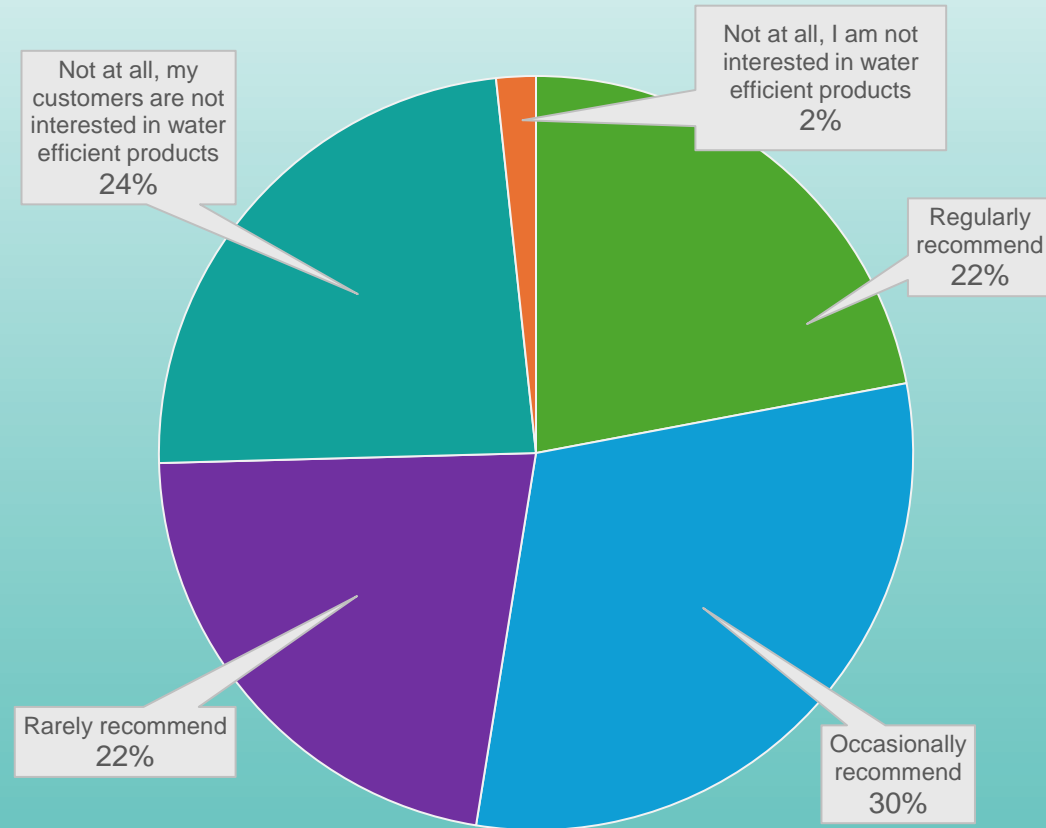
(Please tick all options that apply to you)



Base: All Merchants vs Smaller Local Independent Merchants

# Q15

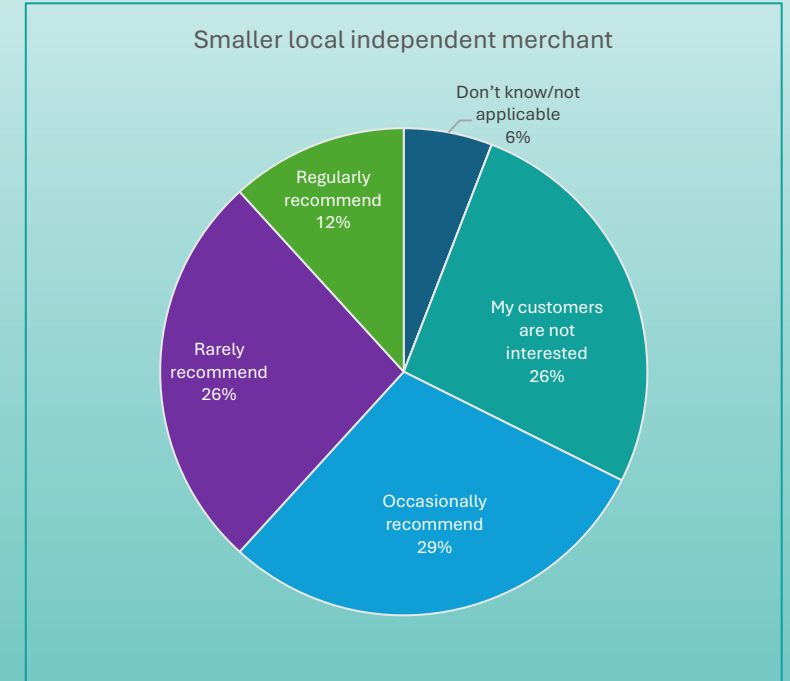
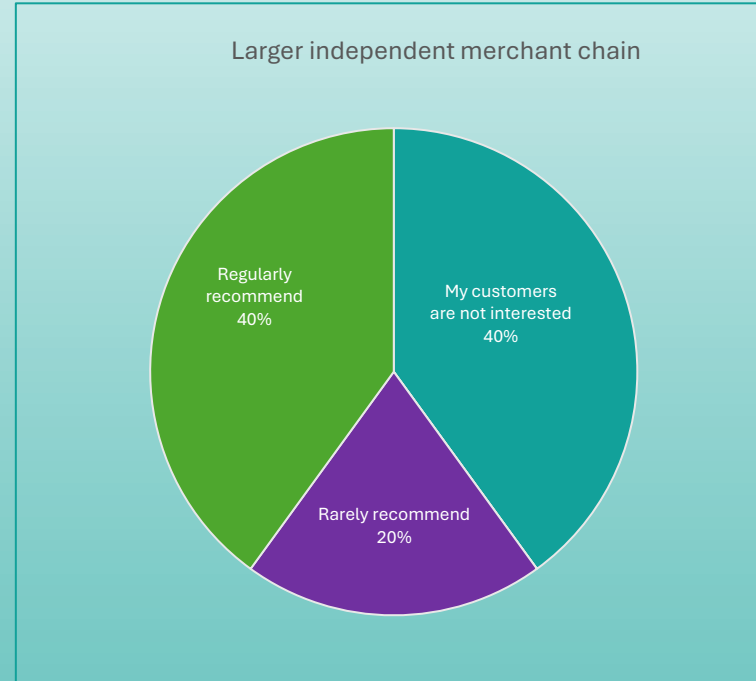
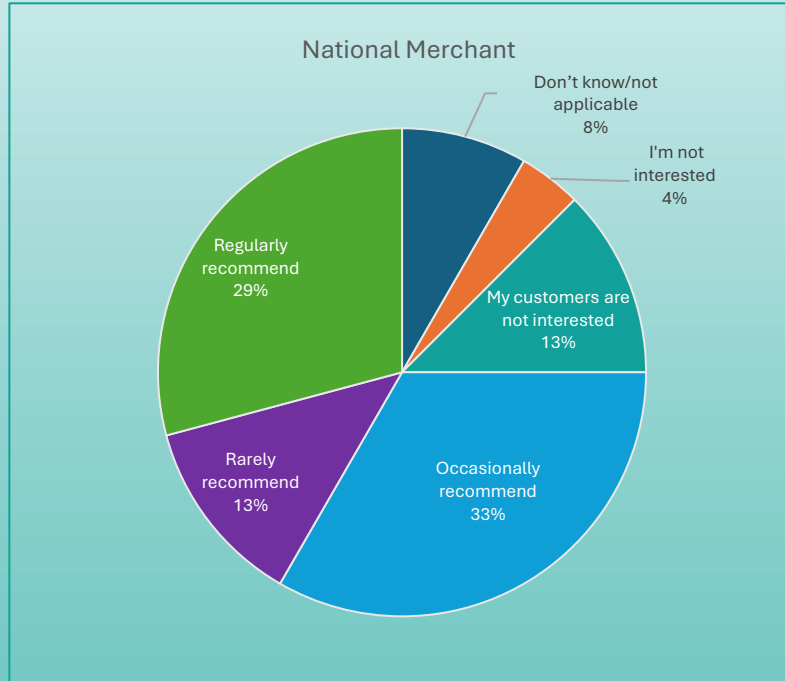
How often do you recommend water-efficient bathroom products to your customers?



Base: 63 All respondents

# Q15

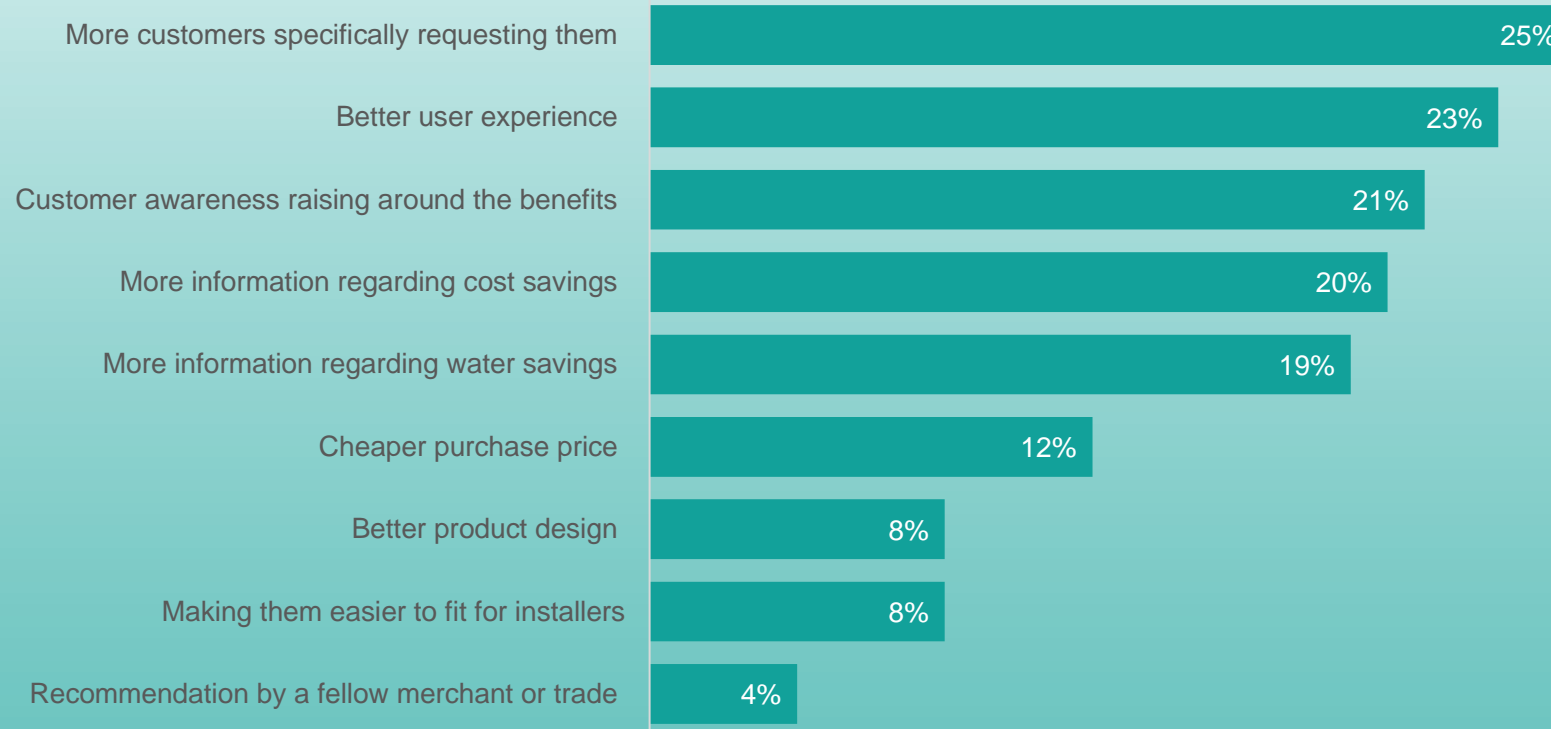
How often do you recommend water-efficient bathroom products to your customers?



# Q16

## What would encourage you to recommend water efficient products to customers more regularly?

(Please tick all options that apply to you)



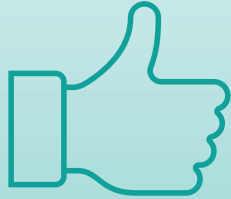
Base: 46  
Merchants who weren't regularly  
recommending water efficient products  
Multi-response question - percentage total over 100%



# Q17

## What is your view of manufactures' printed brochures in relation to bathroom products?

(Verbatim question)



84%

Positive  
Feedback

*"They're very useful and have a big impact on our sales of that supplier"*

*"If a new supplier came in wanting us to display product but did not offer brochures we may well be put off that supplier"*

*Fundamental, used for every initial enquiry.  
They are essential when starting any project.*

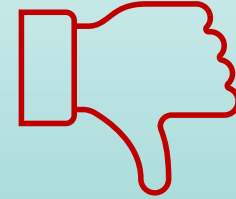


8%

Neutral  
Feedback

*"They have their place but not like past years. Complete bathroom brochures get used more than specific ones"*

*"They are useful for the merchant but unfortunately less so to the customer"*



8%

Negative  
Feedback

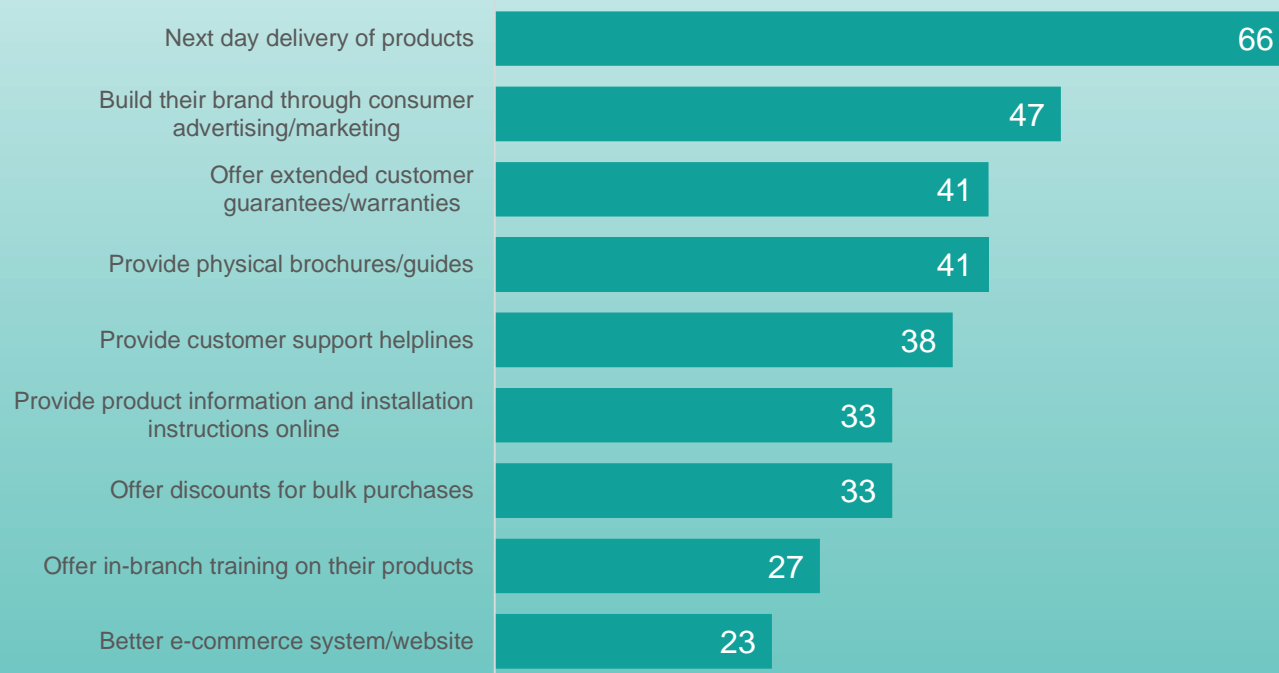
*We use web links in quotes to highlight product.  
We don't take many brochures which helps reduce costs for suppliers and reduces waste"*

*"Not useful, gives the Branch too much choice when they should be selling our range"*

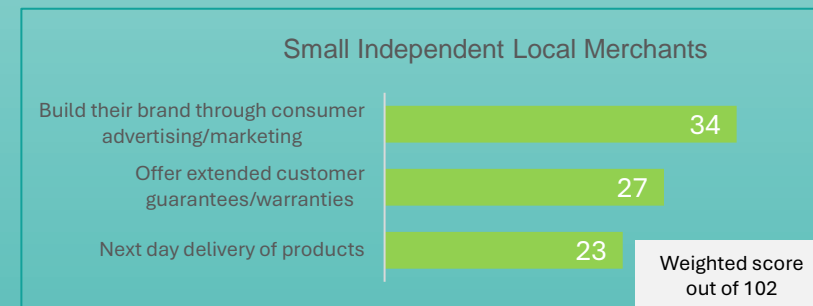
# Q18

## What could bathroom manufacturers do that would help you to sell more of their products?

(Please rank your top three, with the most influential as number one)



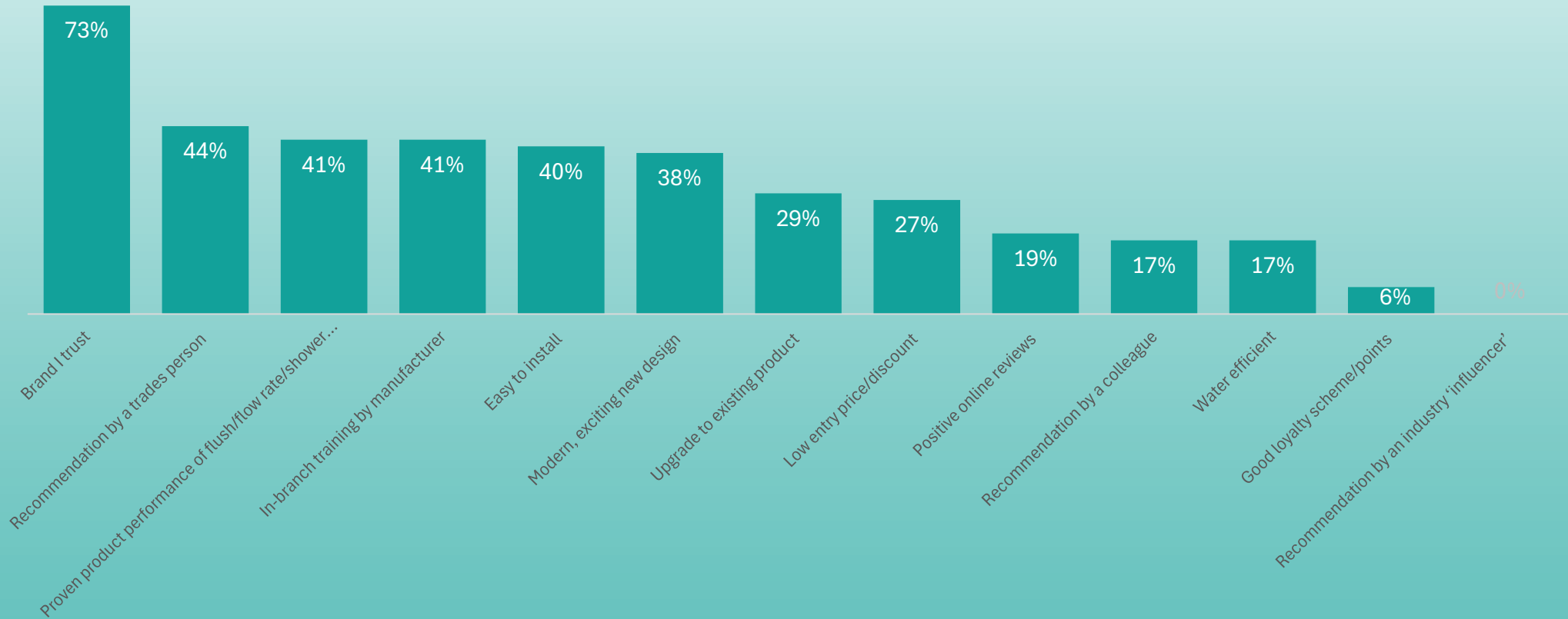
Base: 63 All Merchants  
Weighted score out of 189



# Q19

When a manufacturer brings out a new bathroom product, what gives you confidence to sell it?

(Please tick all options that apply to you)



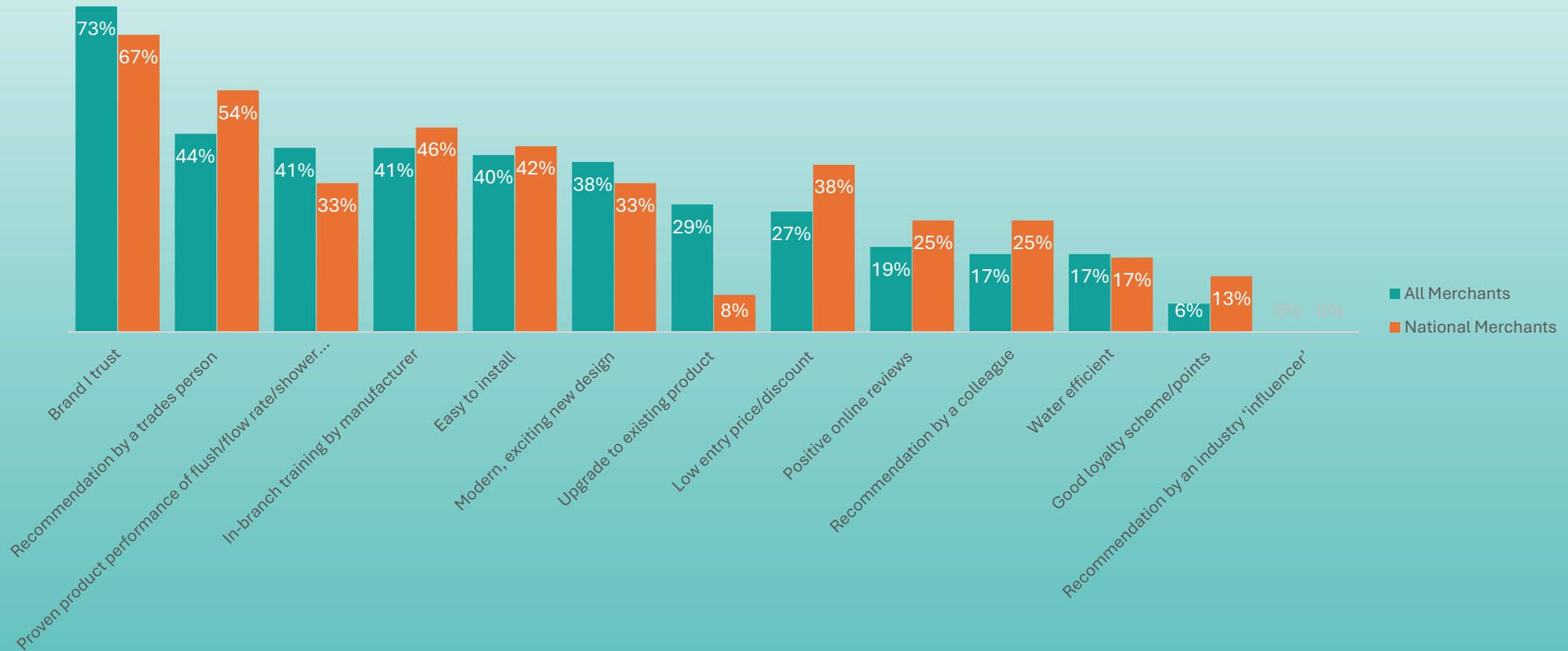
Base: 63 All respondents

Multi-response question - percentage total over 100%

# Q19a

## When a manufacturer brings out a new bathroom product, what gives you confidence to sell it?

(Please tick all options that apply to you)



Base: All Merchants vs National Merchants

# Q19b

## When a manufacturer brings out a new bathroom product, what gives you confidence to sell it?

(Please tick all options that apply to you)

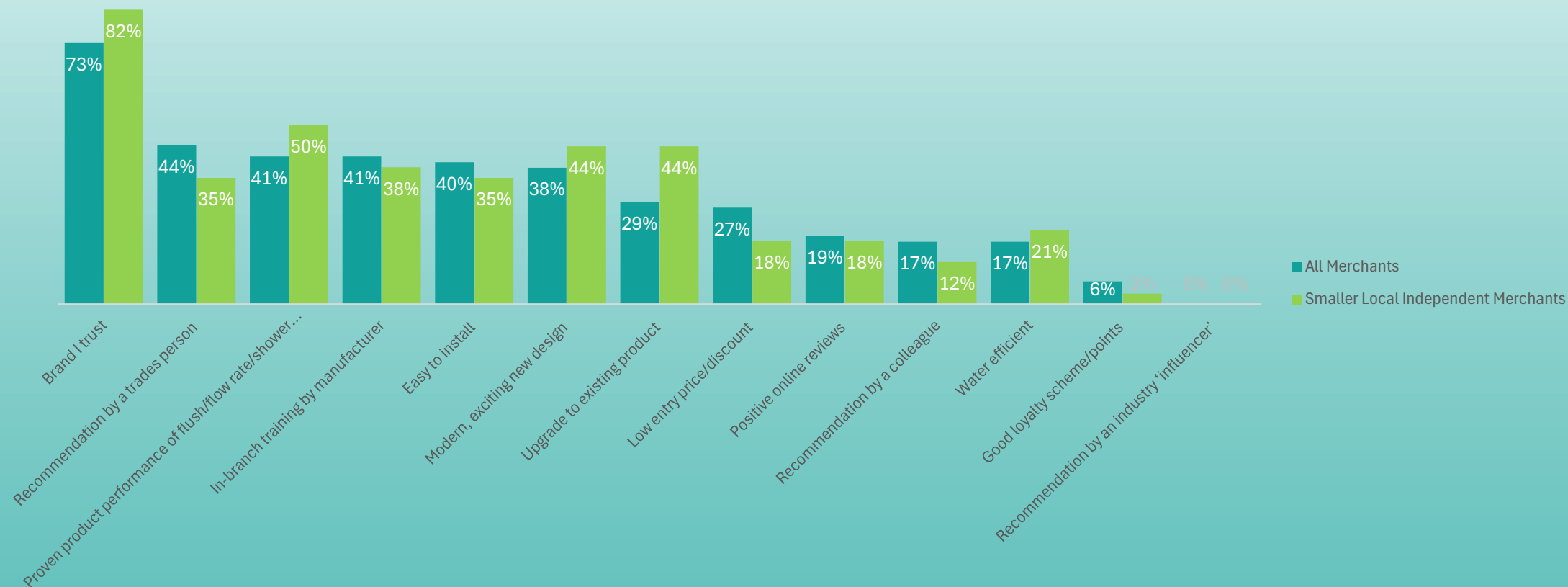


Base: All Merchants vs Large National Merchant Chains

# Q19c

When a manufacturer brings out a new bathroom product, what gives you confidence to sell it?

(Please tick all options that apply to you)

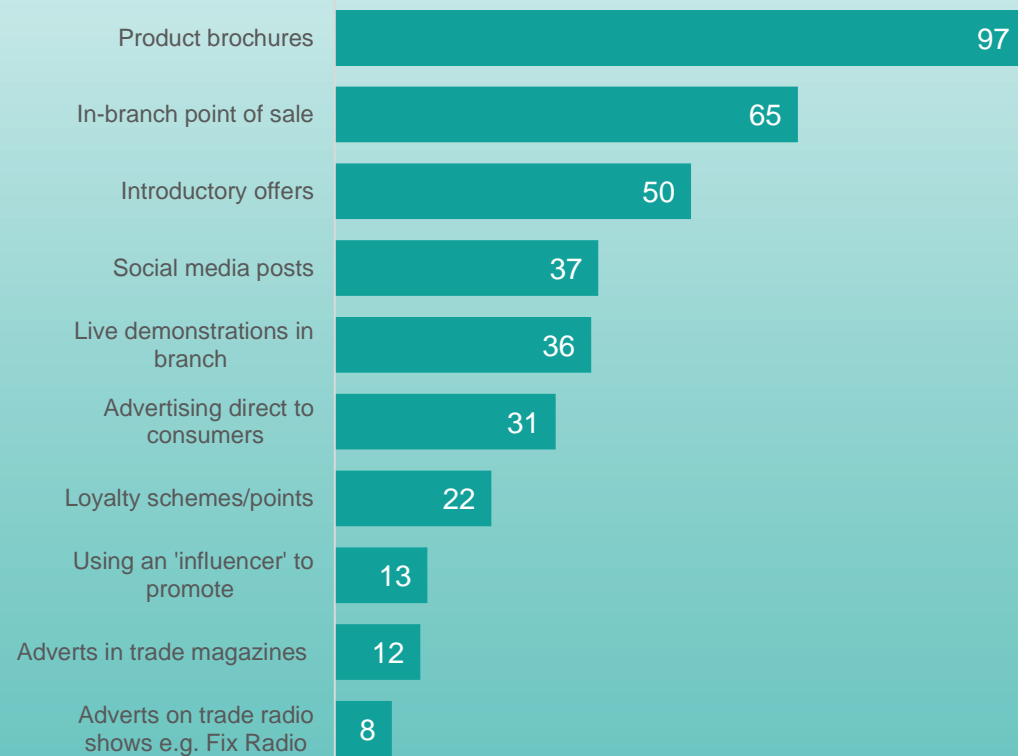


Base: All Merchants vs Smaller Local Independent Merchants

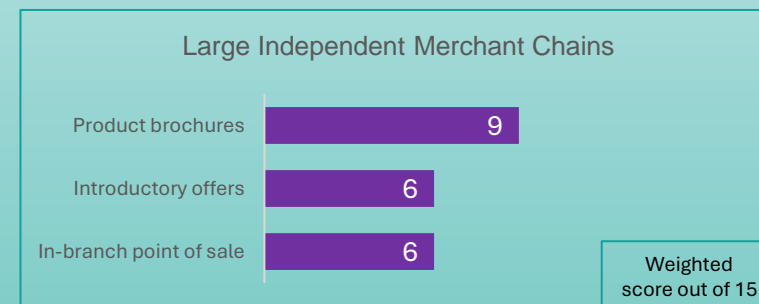
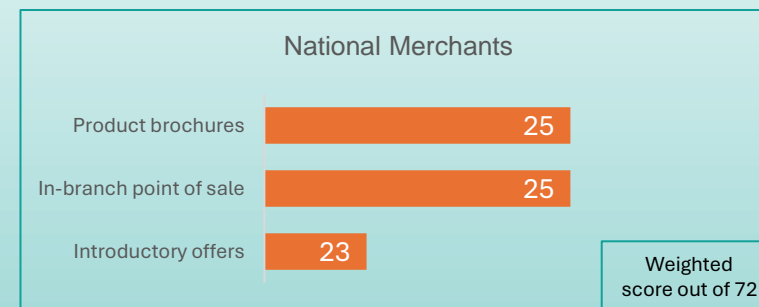
# Q20

Bathroom manufacturers use a wide range of marketing tools to promote their products, which of these works best for your branch and customers?

(Please rank your top three, with the most influential as number one)



Base: 63 All Merchants  
Weighted score out of 189





The impact of e-commerce



The importance of trust

Telephone  
Interview  
Subjects



Driving sales of water-efficient products



Replacing brochures





The impact of e-commerce

# Tell us about how the rise of e-commerce in the industry is impacting your company.

"We have a **basic website** which drives customers to branches. **Merchants do a huge part of the work for installers**, we are their safety net. They have no idea what issues we deal with on their behalf."

"**People need showrooms**, but they also want the best price. If someone will do a design for you and do a quote and do everything for you, you can go online and save £200. Everyone is **on their phones nowadays, checking prices**. We try and **keep codes off our quotations now** and that's working to a point."

**Our online presence is increasing** and there's a brochure online. People will say I've seen X, Y, Z in your brochure online, do you have it on display or can you give me some details about it? So **it drives footfall into the store** and it's fairly positive in that respect"

"Hasn't been too impactful for us because our **legacy has always been showrooms**. It's **two completely different user experiences**. Our online proposition is very much cheap and cheerful, entry level, low to midlevel product. Whereas our showrooms, we focus on starting at that midpoint."

We'll provide quotations, we'll provide designs, and then **they'll just go off and buy everything online**. We do go back to supplier reps to see if we can get a further discount if we are having to compete with online prices. **But it is a big fight**





Driving sales of water-efficient products

# What conversations, if any, is your company having around water-efficient products?

"We **don't have a strategy** in place, there is a gap in merchant knowledge and we know **we need training and upskilling** to heighten awareness within our branches. There is a **small rise in enquiries and anticipate that this will be larger in the future.**"

"We **haven't seen a rise in demand** for water-efficient products yet, suspect that will **come with a bit more education into the end-user.**"

"**Most of the products** I get shown now have some kind of offering of **water saving or energy saving**, and **suppliers want to talk about it**, but we **haven't got a huge influx of customers** coming in and saying we want products that use less water."

"The problem we've got at the moment is unless you're in the industry, you **don't fully appreciate that there is an issue with water scarcity** at the moment. There is an **educational piece** to happen with end users, which needs to be a joint effort for merchants, retailers and manufacturers to communicate that."

"We deal with a housing association and it's important for people like that, but **over the counter it's not a conversation we're having much at all**. We also deal with some **developers and even they are not really talking about it.**"

"What we're trying to do is **shout about the water saving effects** and the environmental effects of products because **it's an added sales feature as opposed to that just looks nice**. Then you can **charge a bit more for this product** because people understand it and there's so much more behind it"

We haven't got a huge influx of customers coming in and saying we want products that use less water. But **we're certainly seeing suppliers coming forward and saying, we've got products that use less water"**.



The Importance of Trust

# When it comes to bathroom products, what does trust mean to you?

"You've got to give people the opportunity to earn trust, so you **give them a few orders, check out the quality and give them a bit of time** to meet those initial expectations that they've set out"

"**Trust is history and evidence.** We are part of the Fortis buying group so we trust that the product is good to start with, but we also **track the number of issues we have from a supplier, the response time, how good the sales team are and do they understand our priorities.**"

"It's about **reliability** and having a proposition that's not going to let you down. And **transparency and honesty**, right through from having an **account manager that you can rely on to support you, through to supplier aftercare and service.**"

"They've **got to be good communicators.** If they say something is going to be there the next day and their lorry breaks down, they've got to give you a ring, which is fine we all have issues."

"The **whole system has to be trustworthy and reliable**, you can have the best prices in the market, but if you have no support team and no structure around it, then it's not sustainable."

Reps are the really important face of a company. They can **quite quickly spoil a relationship** with a supplier"

I think for me **it's more about exclusivity.** If I'm going to put your product in my showroom, am I then going to see it **massively discounted online?** So, I think exclusivity is key for independent merchants and independent showrooms



Replacing Brochures



If you couldn't have physical manufacturer brochures, what would be the next best thing?

"Websites and showrooms are for inspiration, it's **difficult to complete a sale with just a brochure.**"

"I **love a good brochure** myself, but I suppose the **next best thing would be a digital brochure.** Sometimes websites are a bit tough to work with though and it's just **easier with a brochure.** One day they will go, but **hopefully not soon.**"

"It would **have to be a digital brochure**, but I think it **would be detrimental to the category** because you're moving yourself closer to that e-commerce space where you're asking people to look at a screen to make their shopping experience".

"We have **digital brochures on our website**, but they get very little engagement."

"We're **seeing a lot of QR codes.** People walk out with several brochures and it's too much information whereas if they just have a QR code they can get the exact information they want".

"**Not having brochures wouldn't work for us,** we have mainly older customers and they want to take a brochure away with them."

The **only two tools** that we have to sell products are **the brochure and the displays.** So, if you don't have a brochure, you've then got to have a showroom that's 20 times the size of what you've got now because **you'd need to display a lot more products**"

If manufacturers weren't bringing brochures out, then I would like that you could just go onto their website and quite easily just **click on an icon and start looking through the pages of their brochure.** But with a lot of suppliers, you go onto the website, you have to look to find the brochure. And **with some of them you have to download the brochure**