

*Discover your edge*

Monday, 9 November 2015

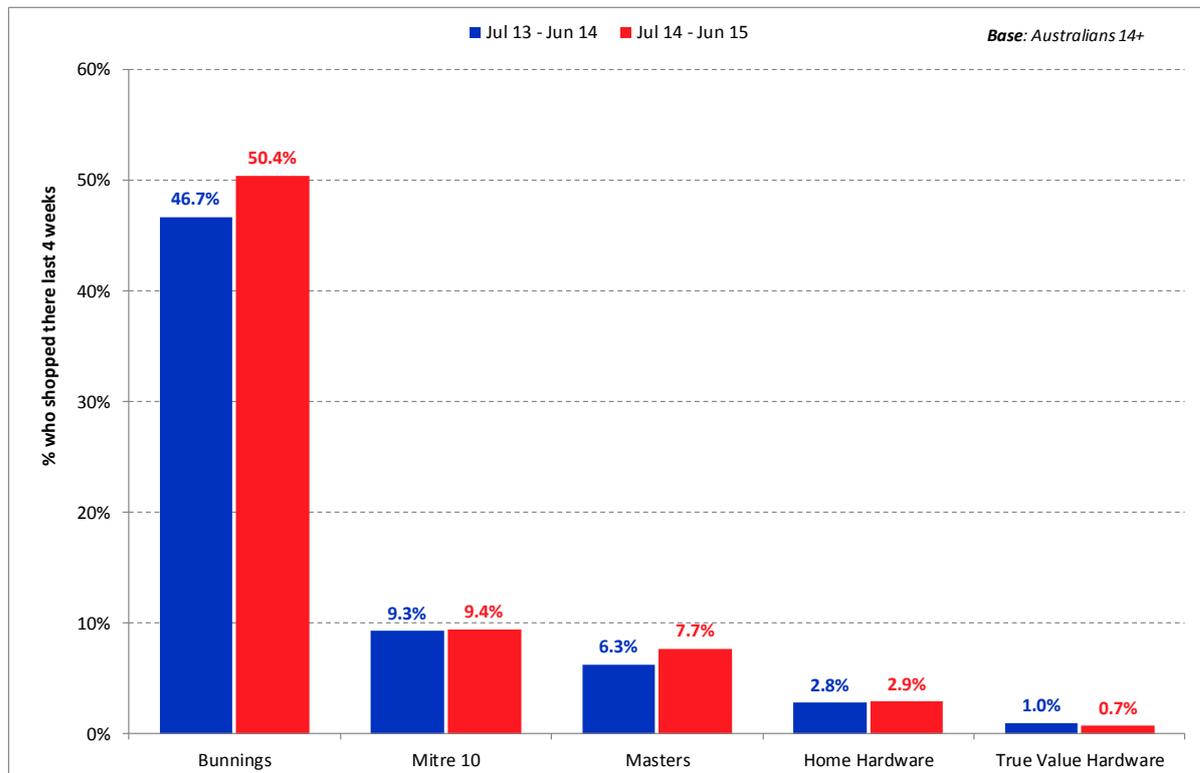
## Just how big is the Big Green Box going to get?

**It's official: over half (50.4%) of the Australian population 14+ (9.8 million people) now shop at Bunnings in an average four weeks, the latest findings from Roy Morgan Research show — up from 46.7% just 12 months ago. This represents an increase of almost 800,000 shoppers per four-week period, testament to the seemingly unstoppable Bunnings juggernaut.**

While Bunnings' continued growth can only be described as stratospheric, most of its smaller competitors also saw increases in customer traffic. Amid recent media speculation that Woolworths might offload its struggling hardware chain Masters Home Improvement, Masters actually gained customers — with 7.7% of the population now shopping there per average four-week period (up on 6.3% 12 months ago).

Mitre 10 (9.4%, up from 9.3%) and Home Hardware (2.9%, up from 2.8%) showed more modest growth year on year, while the proportion of Australians shopping at True Value Hardware dipped from 1.0% to 0.7%.

### Proportion of Aussies who shop at hardware stores in an average 4 weeks, 2014 vs 2015



**Source:** Roy Morgan Single Source (Australia), July 2013–June 2014 (n=19,294) and July 2014– June 2015 (n=19,346).

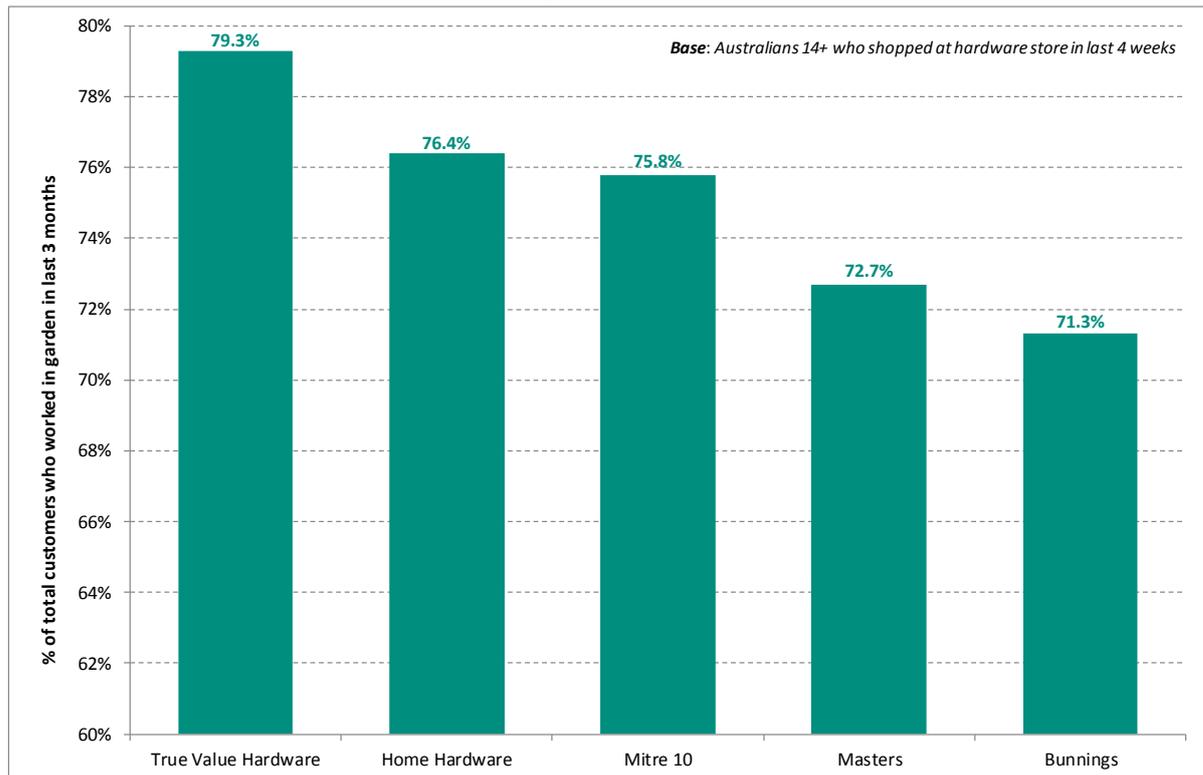
With almost 10 million people making at least one purchase there in an average four weeks, Bunnings' lead over its rivals currently appears to be insuperable. But its smaller rivals have the

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nominal edge in one respect: all attract proportionally more customers interested in gardening than Bunnings.

Nearly eight of every 10 True Value customers (79.3%) work in the garden in an average three months, with 26.6% being veritable green thumbs (getting out in the garden 16+ times per three months). More than three-quarters of Home Hardware and Mitre 10's customers (76.4% and 75.8% respectively) work in the garden, ahead of 72.7% of Masters Home Improvement shoppers and, bringing up the rear, 71.3% of Bunnings shoppers.

### Proportion of customers who work in the garden



Source: Roy Morgan Single Source (Australia), July 2014 – June 2015 (n=12,166).

**Andrew Price, General Manager – Consumer Products, Roy Morgan Research, says:**

*“With more than 50% of the population passing through its check-outs in an average four weeks, Bunnings reigns supreme over the national hardware scene. Even though most of the smaller chains also gained customers over the last 12 months, they stand little chance of catching up with the Big Green Box any time soon. (In fact, one has to wonder whether hardware retail in Australia is close to hitting saturation point, given Bunnings’ massive numbers.)*

*“However, our data indicates that the smaller chains count higher proportions of people interested in gardening among their customer bases. Maintaining and building on this important segment could be one way of ensuring a future in this unbalanced market, rather than trying to challenge Bunnings’ generalised ‘lowest prices’ approach.*

*“Of course, if we’re talking cold, hard customer volume, the combined number of gardening customers who shop at Masters, True Value, Home Hardware and Mitre 10 is still less than 50% of Bunnings’ gardening customers. But it seems obvious that*

*targeting shoppers with specific interests is a more viable tactic for these smaller players than trying to please everybody all of the time.”*

**For comments or more information about Roy Morgan Research’s retail data, please contact:**

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#### **Related research findings**

View our range of hardware store profiles, including [Hardware Store Customer profiles](#) and [Hardware Store Satisfaction](#).

Compiled with data from Roy Morgan’s Single Source survey (the largest of its kind in the world, with 50,000 respondents p.a), these ready-made profiles provide a broad understanding of the target audience, in terms of demographics, attitudes, activities and media usage in Australia.

#### **About Roy Morgan Research**

Roy Morgan Research is the largest independent Australian research company, with offices in each state of Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research has over 70 years’ experience in collecting objective, independent information on consumers.

#### **Margin of Error**

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
7,500	±1.1	±1.0	±0.7	±0.5
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2

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