COVID Influence on **Building Materials** Research Report





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Over the past year, the business and economic impacts of COVID-19 have caused fundamental shifts in the way people are choosing the products they purchase. This is especially true in the building materials industry.

One of the biggest takeaways we found?

What was once an industry that relied on brand loyalty and relationships is now one that is centered on who has the right products at the right time and how they are able to deliver them. In today's ever-changing COVID-influenced landscape, the channel is willing to explore new product offerings, brands and suppliers solely based on availability.



While this economic shift happened in a short period of time, the effects of these changed behaviors will be lasting.

Venveo and The Farnsworth Group teamed up to survey nearly 2,000 industry professionals and DIYers from across the United States to gain insights on what's shifted in how they research, select and purchase building materials products.

They also gave incredible insight into how their habits have changed, what they need from manufacturers and how you can plan for the future to deliver to your customer's needs and continue to grow your business for years to come.

While reading this report, you'll learn:

- The leading cause of switching suppliers
- The impacts on the different sales channels
- The underlying causes of brand and product shifts
- The media's influence on customer choice and buying

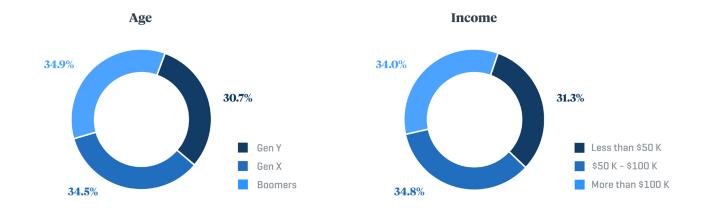


Who We Surveyed & How

We surveyed 1,004 DIYers and 774 Professionals between August 14 - September 1, 2020.

Of the DIYers, 308 were Gen Y, 346 were Gen X and 350 were Boomers. DIYers must have purchased products for a home improvement project within the last three months.

The Professional respondents included Residential and Commercial Builders, General Contractors, Architects, Designers, Engineers, Specifiers, Contractors and Installers. And to qualify as a respondent, they must have influence on products purchased for their job.



Availability Is the Leading Cause of Switching Suppliers

The results of this study show that being a successful business today has a lot more to do with availability than it does loyalty. Both DIYers and Pros are buying more from suppliers who are known to have the products and services they want, when they want it.

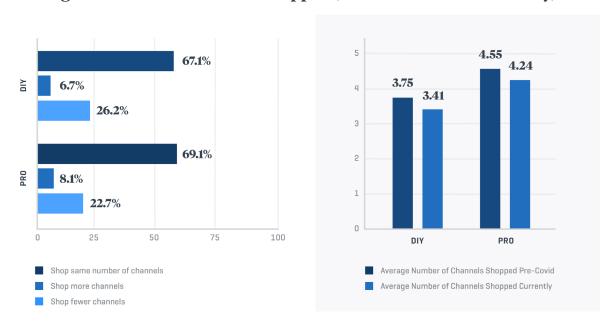
50% of DIYers and Pros that shifted channel use did so because of availability or supply chain issues.

In this current sales climate, you need to focus on communicating openly about availability. If you have in-demand products in stock, communicate that inventory availability — or if you can't get it in stock, at least offer alternatives or other services to help the customer. When you communicate availability or viable alternatives, you are placing your company in a winning situation. By being honest and upfront, you will win trust and loyalty which translates into dollars spent with you.

Impacts on the Building Products Sales Channel

1. There are opportunities for new sales channels to emerge and existing ones to increase their share of customer purchases.

Channel Shift
Change in Number of Channels Shopped (Pre-Pandemic vs. Currently)



Since the beginning of the pandemic, 26.2% of DIYers and 22.7% of Professionals have bought more products from fewer suppliers.

While there were obvious COVID-related reasons for this decrease in the number of places they shopped, the habit will likely hold in place once the pandemic is over. And the longer pandemic-related restrictions decrease channel availability, the more likely it is these new habits will stick.

If you are looking to expand and go after new markets and audiences, the customer is currently open to change. COVID has forced your customers to become comfortable with change. They're becoming accustomed to not finding what they want and having to choose a different

option — whether that's a different store or different brand or even different product (more about that below).

If you want to keep and grow your customer base, invest in customer service. If you're not able to offer a certain product at the moment, communicate about it openly and offer an alternative.

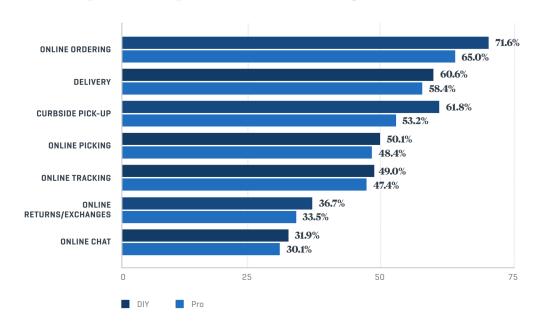
If your customers are shifting gears due to your availability issues, do whatever it takes to overdeliver. Get them the alternative product as fast as you can. Give them the option to pre-order the preferred product so they can have it as soon as it's available. Deliver to their job site at no extra charge.

Essentially, communicate. Over-communicate, in fact. Don't give them any reason to try to solve their problems somewhere else or with something else.

If they aren't sure what you have or when you'll have it to them, customers will go somewhere else. Be upfront and honest about delivery times and availability — both manufacturers to your dealers and dealers to your customers. It'll go a long way to keep people buying your product from your distributors and dealer.

2. DIYers and Pros are buying more online and reducing their in-store purchases.





While home improvement retail (Home Depot and Lowes, especially) has benefited from increased demand, increased basket size and increased consumer spend, Amazon has taken a large share of building and home improvement product purchases from other channels, especially among DIYers. This increase in Amazon's share of purchases (6% increase with DIY, 4% increase with Pros) is largely being taken from big box stores and mass retailers.

In addition to Amazon, other online suppliers (such as Build.com or Wayfair.com) have increased their share of product purchases among professionals since the start of the pandemic.

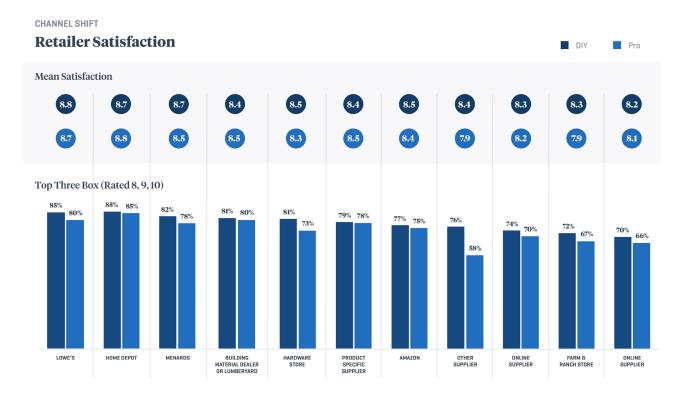
Amazon has increased their share of purchases not because they are any better or carry better products than big box stores or distributors but **because they are online**. COVID has driven customers to online purchases for building materials due to health concerns and availability issues, but there is a lack of available e-commerce outside of the big names like Amazon, Home Depot and Lowe's. Amazon is arguably the most well-known online retailer, so when business was forced online, they became a go-to resource for just about every industry.

COVID has accelerated the demand for e-commerce, and both the channel and certain brands are finding ways of making even complex building products available for purchase online. E-commerce certainly isn't the only way to continue to grow your business, but as online purchases for even larger products and projects becomes normalized, making your products available for easy online purchase will become a significant competitive advantage, if not a necessity.

But this isn't even the real takeaway here. The real shift is that **72% of DIYers and 65% of Pros plan to continue to buy online after COVID ends — and expect suppliers to meet this demand**.

You read that right. It's not that the industry is now buying online, they also expect suppliers to be online once in-store restrictions are lifted. If you were on the fence about e-commerce, this should be the incentive you need to make e-commerce and online presence a priority for 2021. It's no longer about channel conflict concerns. If your products aren't available online, you're going to struggle to gain new sales as online ordering moves to the center of how the industry is purchasing materials.

3. Big Box Stores Are Outperforming Amazon



While Amazon is winning with online purchasing, Home Depot, Lowe's, and Menard's have higher customer satisfaction rates than Amazon — proving that Amazon is not invincible.

What caused Amazon's slip in the ratings? Availability. Why did big box stores do so well in this category? They didn't sacrifice one product offering access point for another.

Home Depot, Lowe's, and Menards have been able to create a unique experience for their customers. With their strong supply chain, they invested in their brick and mortar stores as well as their delivery, giving customers multiple ways to access their inventory whether it was instore, online, curbside pickup, or delivery.

The key takeaway: You can't rely on 'business as usual' to keep your business safe. Home Depot and Lowe's, in particular, are investing heavily in online offerings and supply chain in order to future-proof itself. While they knew Amazon wasn't a threat a few years ago, they also were aware that they could quickly become obsolete if they weren't proactive. Had they not started making changes when they did, they wouldn't be doing so well right now.

Let's take a look at how they set themselves up to be a true online-shopping competitor.

<u>In 2017</u>, while Home Depot had its best quarter to date, its shares dropped because Wall Street thought it wasn't Amazon Proof. So <u>in 2018</u>, they invested \$1.2 billion into a supply chain overhaul. And it paid off. <u>In 2019</u>, they saw a 60% increase in their stocks. And all of this put them in prime position for this pandemic. <u>In 2020</u>, they've seen record-breaking profits.

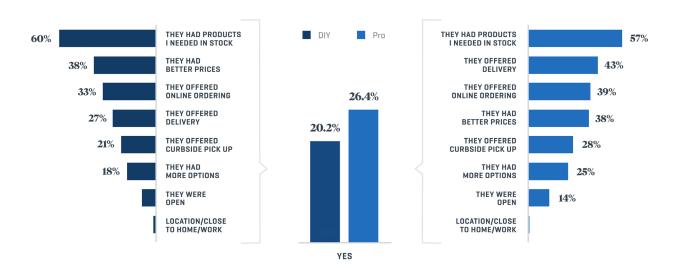
In August this year, Lowe's announced an investment of \$1.7 billion to expand its distribution network by adding 50 cross-dock terminals, seven bulk distribution centers and four e-commerce distribution centers by 2023, some of which will be operational this year allowing Lowe's to capitalize on their recent sales growth.

4. DIYers and Pros will expect the same services they received during the pandemic.

Over the past year, customers have readily adopted new approaches to availability and delivery and will continue to expect products to be available in the ways that are most convenient for them. Whether it's enhanced inventory, online services, delivery, or pricing, it is up to you to determine WHAT customers expect and HOW you meet those needs.

CHANNEL SHIFT

Percentage of Respondents Who Have Started Using a New HI Retailer - Drivers for Using a Retailer



The top three drivers for using a retailer for purchase are now: availability, online ordering and delivery.

These three are even more important than pricing and proximity to the job site or home. In order to win, you need to prove the value of your offering and the ease of purchase.

Time is more precious than ever as customers are balancing a lot more these days — but this won't change when life goes back to 'normal'. Why would you switch from a supplier who delivers back to a supplier who doesn't deliver? Simply put, you wouldn't. This is now being validated with online sales data showing repeat online purchases from first-time customers.

This is going to be especially apparent in e-commerce. The blending of e-commerce with service will keep you competitive in a market full of customers who have grown to expect extra services that will enhance their experience. They expect you to follow them throughout their customer journey, from product discovery and purchase to installation and use.

When planning for 2021, ask yourself these questions:

- How can you make it as easy as possible for the channel to purchase your products?
- If you've nailed online ordering and delivery, what opportunities are there to expand your product or service offering to capture more of the marker?
- Do you need to focus on availability and reducing friction to purchase before expanding?
- How can you connect customers to additional service providers like preferred installers,
 recommended builders, etc. to make their purchase that much easier?

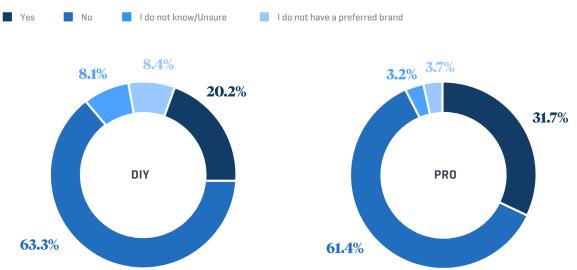
Having multiple avenues for purchase and visibility on inventory is one of the ways that Home Depot has won business in the last few months especially. They've introduced multiple communication channels such as chat, text, phone, mobile app and more. They also invested heavily in their online presence, making it easy for customers to both find them and find the product they are looking for.



The Underlying Causes of Brand Shifts

1. Brands need to rely on more than reputation alone.





Product availability is also responsible for brand shifts during COVID-19 as 20% of DIYers and 32% of Professionals indicated they used a building product or home improvement brand for the first time during the pandemic and that the new brand was better quality and sometimes discounted.

Just to make sure you didn't skip over that... 32% of Professionals, 20% of DIYers used a new brand in the last six months and liked it better. Relying on just your brand name is no longer safe.

The primary reason for this brand shift is because the new brand was available, where the old brand was not. They were forced to change and they liked the change. This is huge. Now that they've been forced to change brands and had a good experience, they may be wondering what else they've been missing out on and more willing to try new brands.

And remember, in order for a distributor customer to go back to their old supplier, they would need to invest in offloading inventory, changing displays and restocking that brand. In today's competitive and price-conscious climate, people just aren't going to do it. Availability is now a key brand feature and will continue to be as long as the supply chain continues to be disrupted.

Builders and contractors are also making changes to their processes, including order processes, delivery processes and sometimes even installation processes. It's unlikely they will undo these changes when supply chains shift just because the previous products and brands are suddenly available again.

The status quo has been disrupted, and you need to work harder to keep loyalty.

For dealers, distributors and manufacturers, this is a key opportunity to ask some important questions.

Dealers and Distributors:

- How can you expand your inventory to get more of the wallet share of your customers?
- Who are your new customers and what can you do to keep their business?

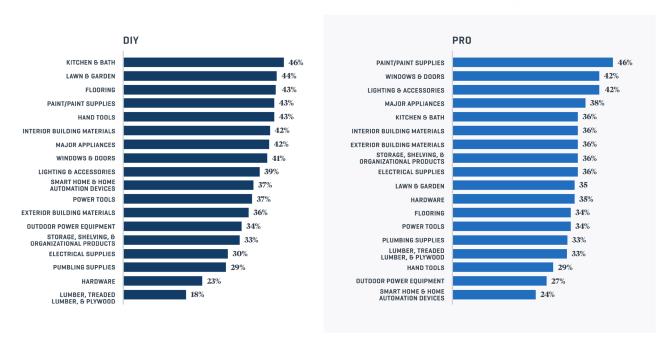
Manufacturers:

- What products are these new customers not using and how can you get them to engage with these products?
- How are you investing in your sales teams to leverage these new customer relationships?



2. No product category is immune to brand shift.

Brand Shift by Product Category (of those who purchased a new brand)



Pros and DIYers purchased new brands in almost every product category. Brands that were once considered mainstays in their categories are no longer safe from brands that are available in the right locations and can be purchased in the ways customers are finding most convenient.

While brand shifts are expected to happen more often within product categories that contain commodities, these shifts are also occurring in product categories that include high-end items.

Among DIYers, Kitchen/Bath and Lawn/Garden saw the highest amount of brand shift. Among Professionals, Paint/Paint Supplies and Windows/Doors observed the highest amount of brand shift. Choosing new brands for bigger ticket items is a notable behavioral change for Pros, who tend to select high-end products based on their reputation and risk for callbacks.

- When thinking of your brand, it's important to research the following:
- Where and how are your customers shopping today?
- What projects are they investing in the most?
- How are they choosing between brands?

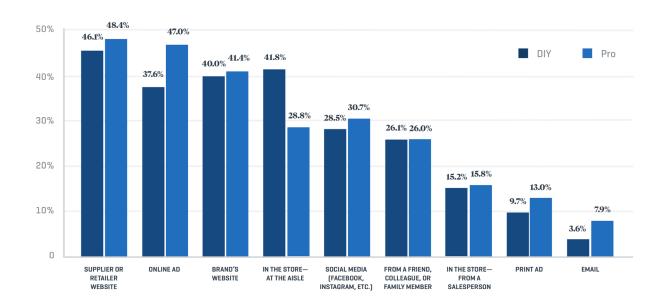


- Are your products conveying the same message/value across your different channels?
- Is your differentiation clear?
- Does your differentiation resonate?

Remember, you may know why you are "better" than your competitors, but your customers don't. Perhaps what you think is a differentiator is at the bottom of your customers' list. You need to be able to tell the right story, tell that story quickly and easily, in a way that makes you stick in their minds.

3. Your online presence is key to promoting your brand.

How Respondents Heard About Their New Brand



Almost half of Professionals (47%) and 38% of DIYers first heard about the new brands they tried from online ads. As shopping at physical locations became limited, customers from across the channel spent more time online than ever before. Manufacturers who invested in online advertising at this time were able to target their audience and capture leads and sales through their efforts. If you've ever wondered if online ads really lead to increased sales, this is your answer.

Respondents also primarily found out about their new brand via the supplier/retailer's website (47%). Many DIYers reported hearing about it via the brand's website as well (40%). Pros learned about new brands more using social media than they did in-store.

What do all of those percentages mean? **A manufacturer's online presence is essential.** Websites and ads are the main drivers for customers discovering new brands. You need to be online if you want to be known.

If people are online now more than ever, you need to be as well. Digital presence is an integral part of a successful brand. That is why you should take the time to do a thorough review of your business website and social media outlets, the content you provide retail sites, and what types of advertising you need to draw customers in to learn more about your product and service offerings.

Ask yourself the following:

- Is my website clear and easy to understand?
- What must my brand communicate online?
- What is most important to customers shopping in my category?
- Do visitors know how my brand can solve their problems at a glance?
- Where are customers spending time online and how is our digital strategy aligned with behaviors? (i.e. Facebook, Instagram, LinkedIn)
- Are my ads both compelling and informative?

Your customers need to know (1) what you can do for them and (2) where to find you. If your online presence doesn't immediately make those two things clear, you're behind the curve.



4. Your brand must be agile to compete in today's market.

BRAND SHIFT New Brand Satisfaction Ad Quality How satisfied are you with the new brand you have tried in recent months? Extremely Satisfied Somewhat Satisfied Neutral or Dissatisfied $\stackrel{\mathsf{L}}{=}$ 56.4% 37.0% 51.2% 43.3% 5.6% Overall, how does the new brand compare to the normal brand you use? Much better than my normal brand Somewhat better Same as my normal brand Somewhat or much worse 21.8% 49.1% 26.1% 23.7% 42.3% 29.8% 4.2%

After purchasing new brands, satisfaction was high for both DIYers and Professionals. Approximately 70% of DIYers and 66% of Professionals indicated the new brand they purchased was either much better or somewhat better than their typical brand. Less than 5% thought the new brand was worse. You read correctly, less than 5%.

While Pros used to be reluctant to switch brands for any number of reasons, they have adapted to current trends and the industry has had to become more agile. If your brand is selected as the "new brand" you have a high likelihood of repeat purchases due to customer satisfaction. Again, this puts many brands at risk that rely on their reputation or belief that customers would not view another brand as performing as well.

As a manufacturer, you should ask these questions to test your agility and give yourself a competitive edge:

 How do you create pull through and demand for your product now that the industry has become used to change?



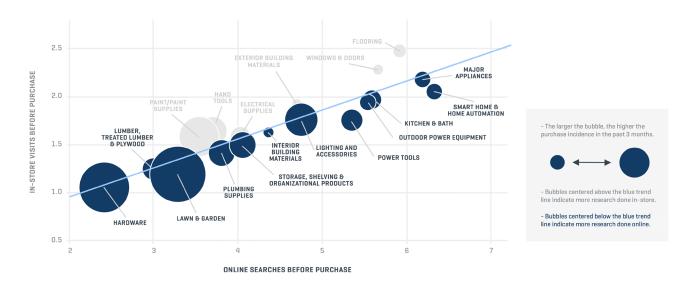
- How does the customer perceive your brand vs your competition?
- Do you have a plan to handle a sudden or increased influx of customers?
- Do you have the right content and resources to support new customers like education on your product, installation resources, BIM models, etc.? How can you take what you've learned about your customers throughout the pandemic and make it part of your regular sales process going forward?

Chapter 5

The Media's Influence on Customer Choice and Buying

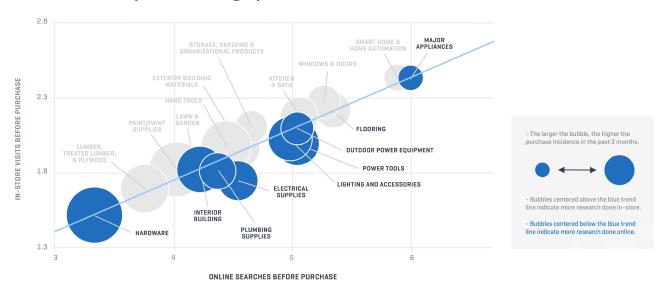
1. Online research drives purchase decisions.

MEDIA USE Online Research by Product Category - DIY



MEDIA USE

Online Research by Product Category - Pro



Overall, online research was done nearly three times as often as in-store research prior to the purchase. You have three times the opportunity to communicate how your products solve your customer's problems online as you do in-stores and three times the opportunity to build your brand online as you do in-store.

The higher the price point or more complex the product or more options available within a product category, the higher the multiple. Once your customer is in a store, they're at the very bottom of the funnel, likely making the final comparisons between you and a competitor.

It's important to note that COVID didn't start the trend of researching online before moving to an in-store purchase. Consumers have been leveraging online research in their purchase journey for years. However, as in-store visits were likely limited during COVID, customers had to lean on the product information available online.

That means that if you aren't easily found online, you likely lost sales.

If you want to grow your market share in the coming years, you need to be investing in both how you talk about your product online (also known as brand or messaging) and how easy it is for your customers to find you when they're searching for solutions.

To be easily found online, you need to show up when customers are searching for questions or solutions around your product offerings.

This means utilizing Search Engine Optimization (SEO), Search Engine Marketing (SEM), Social Media Ads and even YouTube. Make sure your content is using short- and long-tail keywords. Post content consistently on both your website and on your social media to see the best results.

Boost social posts that are doing well to get even more traffic.

	Click here for more information on how to use SEO to your advantage.
r - 	Click here to learn how to use online ads to grow brand awareness.

The amount of research done by the channel varies widely based on product category. But for both DIYers and Professionals, the most researched products include flooring, major appliances and smart home/home automation products.

There are subtle changes in behavior among the groups, though.

For DIYers:

- Flooring and windows/doors skewed toward in-store research.
- Smart home automation and major appliances skewed toward online research.
- DIYers researched more as the complexity of the project increased.
- DIYers had a lower purchase incidence where products were larger purchases (like flooring and windows/doors).

For Professionals:

- Windows/doors and kitchen/bath leaned toward in-store research.
- Power tools skewed more online.
- Pros followed the trendline with price dictating the time spent researching.



If Pros are researching, they have a project, not just an idea of a project.

- Take a moment to find your product category on this graph and determine:
- Does your marketing plan align with the average number of in-store and online visits customers make throughout the purchasing process?
- Do you have a limited opportunity to get your information out there?
- What information is most critical, when and where?
- Does your category's research phase include more access to your customers throughout the process?
- Does your website clearly communicate how you solve customer problems?
- Does your website draw customers farther into the site for more information?

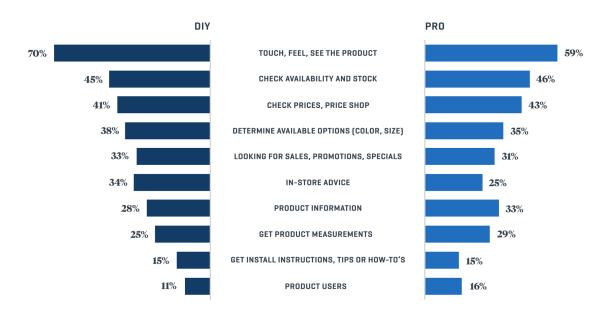
2. There are specific reasons for online vs. in-store research.

Reasons for ONLINE Product Research (Top 3)



MEDIA USE

Reasons for IN-STORE Product Research (Top 3)



Know where your products fall in the research spectrum to determine your opportunity to impact customers through information and which are more likely to be decisions made at the point of sale.

Both DIYers and Pros tend to do research online to price shop (78% - DIY) (Pro - 68%) and check inventory (67% - DIY) (73% - Pro).

They're also both going into the store to touch, feel and see the product. As advanced as your online presence can be, there is still a strong need for pros and DIYers to touch and feel products to really feel confident they're making the right decision. Offering samples is also a great way to meet this need at a time when in-store visits are being kept to a minimum.

We're also continuing to see the trend of DIYers (and DIFM homeowners) wanting to be handson with the products used in their home improvement projects. They want to feel and see the products they (or their contractor) are using.

It's true that not every product is a fit for DIYers. However, if you have a DIYer market, you need to provide the same level of attention and detail for them as you do for Pros because DIYers and Pros are researching for the exact same reasons.

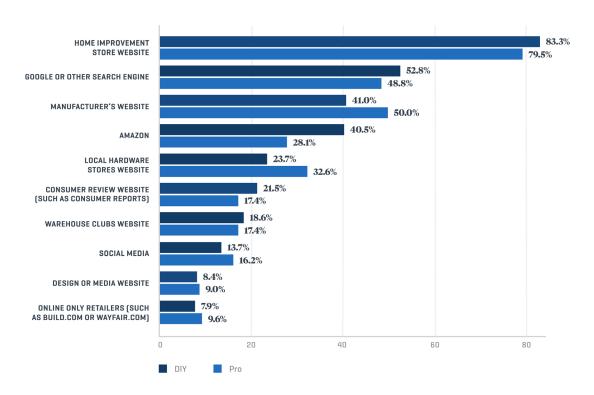
There is a direct relationship between the price point, complexity and number of options with the amount of research being done. Product categories that cost more, involve technology or have a high number of choices require more research — with an emphasis in online research — often from both the Pro and the DIYer.

Whereas commodity-oriented products (low price, consumables) see much less research and are more likely to be researched in-store as much as online.

3. Consistency is key to gaining brand awareness.

MEDIA USE

Online Information Sources



In a time when shifts like these are occurring, consistent messaging is key. Your brand and products need to be accurately represented by all business representatives and content mediums to ensure your customers remain comfortable with your choices.

Both DIYers and Pros are using multiple online media sources to find information, such as retailer websites, Google and manufacturers' websites. If you have conflicting information on two or more of these sources, customers won't understand your product and won't choose it.

Consider these questions about brand consistency:

- How is your sales team talking about the product?
- How are your dealers, distributors and retailers talking about the product?
- Is information about your product communicated clearly and consistently everywhere, including online and in-store?
- What are you hearing people say? And most importantly, is what you're hearing consistent with what you are saying on your website, newsletters, etc.

Chapter 6

The Underlying Causes of Brand Shifts

So you understand what is impacting the sales channel, what is causing brand shifts and how media is influencing your customers. Now what?

You need to make a plan on how all of this knowledge will affect your 2021 plans. For instance, you know that your online presence is essential to gaining traction with customers. If you aren't online (including having a clear website, social media presence, e-commerce site, etc.), they won't find you while researching and, therefore, won't choose you when it comes time to buy.

- **1.** Evaluate your current online presence. Know where your customers are online, when they are online, when they are in-store, how easy it is to find you, what truly differentiates your brand and how you deliver that message.
- 2. Evaluate your availability. All the presence in the world won't help if customers can't actually buy your product. Are your products online? Are they easy to purchase? Can they be delivered to the job site or home, or picked up at the distribution center? Make it easy to get your product in their hands. At a minimum, over-communicate and be transparent. Then offer them solutions to access your product as soon as possible. Go the extra mile to make it as painless as possible through a first-class experience. The less friction to purchase, the more likely the purchase.
- **3.** Make a plan on how to address any holes in your brand, channel and online presence. In 2021, focus on gaining a deep understanding of your customer, their needs and



their behaviors. Use these understandings to develop strategies for branding, product development, sales, marketing, your website, your social media, your blog and anything else that needs work. Be brutally honest about what is not serving you in this "new normal." You can no longer rely on loyalty and relationships. Customers want information, products and services on their terms, and they're going to go to those that can deliver.

Key Strategies to Implement

There are nine key marketing strategies you should implement, once you know where your opportunities lie: research, SEO, SEM, social ads, content and social media, website and e-commerce.

RESEARCH

Your first strategy should be to figure out your strategy. How? Research. If you don't understand your audience down to the tiniest details, especially in this current COVID-changing world, you will never be able to market to them effectively. However, market research has a lot of variety. But don't worry, we'll break it down for you into four key categories: Customer, Brand, Product and Market.

MARKET POSITIONING

To position yourself correctly in the market, you need to understand: your customer, how your brand is perceived, how your product fits the actual needs of your customers and how your company and its products fit (and are seen by) the market.

INSIGHTS

Capturing high-quality data is only part of the process. You must be able to translate that information into actionable strategies that will improve your market performance. This should be done through a combination of detailed analysis along with a thorough understanding of your industry, category and customer fundamentals. With customized research designed around your needs and a deep knowledge of the industry, you can define your market, product, brand and customer strategies and be ready to execute.

SEO

SEO, or Search Engine Optimization, ensures your website and products are found organically when potential customers are researching for their project. The easiest way to do this? Create quality content (blogs, landing pages on your website) that answers the questions people are searching most often in relation to your product. For example, a long-tail keyword might be "easy to clean kitchen tile". You could create a blog about "5 Beautiful Easy to Clean Kitchen Tiles Clients Will Love" that targets designers and contractors.

SEM

Along the same lines as SEO, you need focus on SEM or Search Engine Marketing. SEM is remarkably similar to SEO — except it's search optimization that you pay for. SEO can be done for free; all you have to do is write high-quality content consistently. In essence, SEM helps you show up higher in search results by paying for top search result slots. It can also be an umbrella term that covers PPC (or pay per click) ads. It can be a complicated world, but the payout can be very high if you do it right.

SOCIAL ADS

You need to be where your audience is and that's on social media. However, social media is extremely crowded these days, so you need to go above and beyond to be seen by your target audience. That's where social ads come in. You can create social ads that run by themselves or, if you have an organic social post that is doing very well, you can boost that post to have it seen by more people. In social media, the more eyes on your posts and ads, the better. It grows your brand awareness and gets people interested in what you're talking about.

CONTENT AND SOCIAL MEDIA

But before you go throwing money into SEM and social ads, you should work on your organic reach first. Create a consistent posting schedule of blogs and social media posts. Once you are consistent and growing your audience, THEN focus on paid efforts. If you are inconsistent to start, all the money in the world won't help get eyes on your products. (Though Google and Facebook certainly won't mind if you try.)



WEBSITE

Your website is a key part of your online presence. If people know your name, it'll be the first place they go for information on your products. It's a bad look if they can't find what they need on your website. Make sure that your website has everything they need to make a purchasing decision: what problems your product solves, how it'll make their job (or life) easier, where they can buy it and answers all the other important questions they're asking. Not only is this information essential to have on your site, but it's essential that it's easy to find. Think about adding a chatbot or an FAQ page. Make sure your product pages have all the info in an easy to digest manner, including sizes, material, specs and IMAGES. You cannot have too many real-life images of your product so customers know how it'll look and perform in their project.

E-COMMERCE

E-commerce, once only thought to be the way of the future, is today's reality. As shown by the data we looked at above, while people may still like going in-store to see or purchase your product, that's no longer a viable option all the time. They want to be able to get your product online. And if they can't, they'll buy something else that they can get online. You can't wait to set up e-commerce anymore. If you don't have it, you're already behind. This once nice-to-have is now a must.



Where Do You Stand in Your Industry?

Looking for more insights on a product category or vertical?

The Farnsworth Group can help you dig deeper into the results and offer suggestions on getting the best insights for your business needs.

Are you out-marketing your competitors online?

Without a clear picture of your competition's digital strategy, it's harder to see the gaps and opportunities on your own. Let us do the research and heavy lifting for you. Venveo can help you dive deep into your competition's digital marketing strategy, and show you how to dominate your competitive landscape and grow leads and sales. Let's get started.