

Nursery and Baby Equipment - UK - February 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“New product innovations in the sector such as prams and pushchairs with lighter frames and baby monitors with video and Wi-Fi have helped to drive growth in the nursery and baby equipment market, as renewed consumer confidence among parents incentivises higher spending.”
– Tamara Sender, Senior Retail Analyst

This report looks at the following areas:

- How has the market performed?
- What can specialist retailers do to drive purchasing of nursery and baby equipment?
- What are the opportunities for growth in the sector?

The nursery and baby equipment market grew in 2015. The market has benefited from an improving economic climate, new i-Size regulations on car seats and lots of new product innovations particularly in the prams/pushchairs and safety categories.

While specialists retain the largest share of the market, they have seen their proportion of sales in the sector decline as the main players have struggled. Online-only retailers, in particular Amazon, are stealing market share as consumers look to hunt down the best prices online.

Online stands out as the preferred channel overall to help when shopping for nursery and baby equipment, with the majority of parents going online to get ideas, compare prices and get advice.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Nursery and Baby Equipment - UK - February 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
Products covered in this report

Executive Summary

The market

Nursery products see positive growth

Figure 1: Best - and worst-case forecast of UK retail sales of nursery and baby equipment, 2010-20

Birth rates dip 0.4% in 2014

Figure 2: Number of live births in England and Wales, 2010-14

Companies and brands

Specialists struggle

Figure 3: Distribution of spending on nursery & baby equipment, by type of retailer, 2015

Brand research

Figure 4: Attitudes towards and usage of selected brands, December 2015

Innovation

The consumer

Mothers are the main buyers

Figure 5: Items of nursery and baby equipment purchased for children aged 0-4, November 2015

80% receive items as gifts

Figure 6: Agreement with statements about nursery and baby equipment, November 2015

Specialists most popular among ABs

Figure 7: Retailers where nursery and baby equipment was bought from, November 2015

Low prices most important factor

Figure 8: Most important factors when choosing which retailer to buy from, November 2015

Online is the preferred method of shopping

Figure 9: Preferred method of shopping for nursery and baby equipment, November 2015

Fathers prefer products with latest technology

Figure 10: Agreement with statements about nursery and baby equipment, November 2015

What we think

Issues and Insights

How has the market performed?

The facts

The implications

What can specialist retailers do to drive purchasing of nursery and baby equipment?

The facts

The implications

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Nursery and Baby Equipment - UK - February 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

What are the opportunities for growth in the sector?

The facts

The implications

The Market – What You Need to Know

Nursery products see positive growth

Car seats drive growth

Birth rates dip 0.4% in 2014

Rising average age of mothers

Breastfeeding rates grow year-on-year

Parents see improving finances

Market Size and Forecast

Nursery products see positive growth

Figure 11: Best- and worst-case forecast of UK retail sales of nursery and baby equipment, 2010-20

The future

Figure 12: UK retail sales of nursery and baby equipment at current and constant prices, 2010-20

Forecast methodology

Market Drivers

Birth rate dips 0.4% in 2014

Figure 13: Number of live births in England and Wales, 2010-14

Drop in fertility rate

Figure 14: Total fertility rate, England and Wales, 2005-14

Rising average age of mothers

Figure 15: Trends in the mean age of mothers at birth of their first child, England and Wales, 2005-14

Slowest growth projected for the number of 0-4-year-olds

Figure 16: Percentage change in the age structure of the UK child population, 2010-20

Breastfeeding rates grow year on year

Rocketing childcare costs add to financial pressures

Childcare places increase, providers decrease

Parents are the main car owners

Spending remains cautious

Figure 17: Top categories in which parents spent more compared with last year, by children's age, January 2015

Key Players – What You Need to Know

Specialists struggle

Online retailers steal market share

Connected nursery system

Designer collaboration pushchairs

£0.5 million uplift in advertising spend

Mothercare is the most trusted brand

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Nursery and Baby Equipment - UK - February 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Mamas & Papas is seen as worth paying more for

Channels of Distribution

Specialists struggle

Figure 18: Distribution of spending on nursery & baby equipment, by type of retailer, 2015

Online retailers steal market share

Figure 19: UK estimated distribution of spending on nursery & baby equipment, by type of retailer, 2013-15

New entrants to the market

Competitive Strategies

Financial outlook

Retail offering and brand positioning

Digital activity

Launch Activity and Innovation

Product launches

Connected nursery system

Figure 20: Motorola and Hubble Connected

3-in-1 baby carrier

Obaby's versatile stroller

Free box targeting mums and mums-to-be

Organic mattress protector

Nursery furniture designed for modern urban living

Designer collaboration pushchairs

Retail innovations

Mothercare's in-store play areas

Responsive website launch

Advertising and Marketing Activity

£0.5 million uplift in advertising spend

Figure 21: Recorded above-the-line, online display and direct mail total advertising expenditure on nursery and baby equipment, 2011-15

Chicco tops the list of advertisers

Figure 22: Recorded above-the-line, online display and direct mail total advertising expenditure on nursery and baby equipment, by advertiser, 2011-15

Television advertising surges in 2015

Figure 23: Recorded above-the-line, online display and direct mail total advertising expenditure on nursery and baby equipment, by media type, 2015

A note on adspend

Brand Research

What you need to know

Brand map

Figure 24: Attitudes towards and usage of selected brands, December 2015

Key brand metrics

Figure 25: Key metrics for selected brands, December 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Nursery and Baby Equipment - UK - February 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brand attitudes: Mamas & Papas is seen as worth paying more for
Figure 26: Attitudes, by brand, December 2015

Brand personality: Mothercare suffers from an unappealing image
Figure 27: Brand personality – Macro image, December 2015

Britax associated with durability
Figure 28: Brand personality – Micro image, December 2015

Brand analysis

Britax enjoys highest recommendation levels
Figure 29: User profile of Britax, December 2015

Mamas & Papas boasts stylish and socially-responsible image
Figure 30: User profile of Mamas & Papas, December 2015

Mothercare: The most widely-used and trusted
Figure 31: User profile of Mothercare, December 2015

Graco needs to increase exposure
Figure 32: User profile of Graco, December 2015

The Consumer – What You Need to Know

- Mothers are the main buyers
- Seven in ten buy new car seats
- 80% receive items as gifts
- Supermarkets most popular place of purchase
- High levels of online purchasing
- Low prices most important factor
- Online is the preferred method of shopping
- Online seen as cheapest option
- Fathers prefer products to have latest technology

What Items Consumers Have Purchased

- Mothers are the main buyers
Figure 33: Items of nursery and baby equipment purchased for children aged 0-4, November 2015
- Seven in ten buy new car seats
- Pram versus baby travel system
- C1s buy most items
Figure 34: Repertoire of items of nursery and baby equipment purchased for children aged 0-4, November 2015

Statements Related to Nursery and Baby Equipment

- 80% receive items as gifts
Figure 35: Agreement with statements about nursery and baby equipment, November 2015
- Older parents receive second-hand items
- Engaging fathers

Where Nursery and Baby Equipment were Bought

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Nursery and Baby Equipment - UK - February 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Specialists most popular among ABs

Supermarkets shoppers are drawn to low prices

Figure 36: Retailers where nursery and baby equipment was bought from, November 2015

High levels of online purchasing

Repertoire

Figure 37: Repertoire of retailers where nursery and baby equipment was bought from in-store, November 2015

Figure 38: Repertoire of retailers where nursery and baby equipment was bought from online, November 2015

Factors Influencing Purchases

Low prices most important factor

Figure 39: Most important factors when choosing which retailer to buy from, November 2015

ABs look for wide choice of brands and good delivery

Older parents look for staff expertise

Preferred Method of Shopping for Nursery and Baby Equipment

Online is the preferred method of shopping

Figure 40: Preferred method of shopping for nursery and baby equipment, November 2015

Getting advice online

Stores used to compare quality

Attitudes towards Nursery and Baby Equipment

Online seen as cheapest option

Figure 41: Agreement with statements about nursery and baby equipment, November 2015

Convenient products

ABs drawn to well-known brands

Fathers prefer products with latest technology

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Size and Forecast

Forecast methodology

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com