

Bathrooms and Bathroom Accessories - UK - August 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.



“When households think about choosing a bathroom retailer for a refit, full-service retailers that offer fitting and planning services top their priorities, so services have become an essential factor in the marketing mix.”
— Jane Westgarth, Senior Market Analyst

This report looks at the following areas:

- How much influence does the builder/fitter have in choosing where to buy?
- What are the key factors that influence choice of bathroom retailer?
- Are people interested in water-saving bathrooms?

More than 60% of British homes share one bathroom and people want to manage the clutter that comes with this, including more storage space, cupboards to keep toiletries and cleaning products out of sight and useful caddies in the shower. This creates plenty of ways for retailers to add value to a bathroom makeover. More than this, people want a pleasing ambience in their rooms and this helps drive demand for bathroom accessories, as well as finishing off the room with the right lighting.

**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

Bathrooms and Bathroom Accessories - UK - August 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

2015 was a strong year for the bathroom market
Figure 1: Consumer spending on bathrooms, 2011-21

Diverse market with many elements
Figure 2: Market for bathroom fittings and accessories, by segment, 2015 (Est)

Demand for bathrooms is closely linked to the housing market
Figure 3: Property transactions in the UK, 2007-17

Companies, brands and innovation

Bathstore builds market share

DIY stores lead the market

Victoria Plum grows to become a substantial competitor
Figure 4: Distribution of bathrooms, 2015 (Est)

Virtual reality likely to emerge as important marketing tool
In-store touchscreens allow retailers to show broader ranges

Advances in toilet design

Recreating a spa experience

Connected home technology in the bathroom

The consumer

Adults prefer to shower

Interest in innovation
Figure 5: Interest in new areas of innovation, October 2015

62% of homes have just one bathroom
Figure 6: Number of bathrooms in household, June 2016

Sharing bathrooms is commonplace

34% of households have a separate toilet

Young adults most likely to revamp bathrooms

Households likely to refit bathrooms one to three years following house move

Typical revamp costs £2,000
Figure 7: Cost of refit by DIY, builder or retailer, June 2016

47% appointed their own fitter
Figure 8: Refit by DIY, builder or retailer, June 2016

Builders influence decisions about where to buy
Figure 9: Bathroom fitting decisions, June 2016

**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

Bathrooms and Bathroom Accessories - UK - August 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.

47% bought bathroom accessories

Replacement of bathroom fittings

Figure 10: Bathroom fittings replaced in the last 3 years, June 2016

DIY stores dominate the bathroom market

Figure 11: Retailers used for bathroom furniture/fittings, June 2016

Retail choice is highly influenced by services

Figure 12: Factors influencing choice of retailers/suppliers, June 2016

Keeping control of the clutter

Figure 13: Importance of bathroom features, June 2016

What we think

Issues and Insights

How much influence does the builder/fitter have in choosing where to buy?

The facts

The implications

What are the key factors that influence choice of bathroom retailer?

The facts

The implications

Are people interested in water-saving bathrooms?

The facts

The implications

The Market – What You Need to Know

Bathroom makeovers linked with housing market

Uncertain outlook

40% of spending is on core sanitary ware

DIY stores dominate

Adults prefer to shower

Multi-generation households

Water meters in 48% of homes

Number of UK homes will grow 4% in five years

The housing market

Changes in the buy-to-let market

Home extensions and improvements

Market Size and Forecast

Uncertainty governs consumer sentiment

Figure 14: Consumer spending on bathrooms, 2011-21

Flat market conditions

Figure 15: Consumer spending on bathrooms, 2011-21

Forecasts for bathroom fittings

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

Bathrooms and Bathroom Accessories - UK - August 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.

Figure 16: Consumer spending on bathroom fittings, 2011-21

Forecasts for bathroom accessories

Figure 17: Consumer spending on bathroom accessories, 2011-21

6% growth in 2015

Figure 18: Consumer spending on bathrooms, 2011-16

Forecast methodology

Market Segmentation

Figure 19: Consumer spending on bathroom fittings, 2011-21

Figure 20: Consumer spending on bathroom accessories, 2011-21

Baths, basins and WCs account for 40% of spending

Figure 21: Market for bathroom fittings and accessories, by segment, 2015 (Est)

Bathroom furniture shows fastest growth

Figure 22: Bathroom fittings market, by segment, 2012-15

Fitting furniture in the bathroom

Innovation in the shower market

Curves return to shower heads

Statement features

Innovation in WCs

A shower of your own

Larger mirrors

Advances in lighting and controls

Channels to Market

Multiples gaining market share

Figure 23: Distribution of bathrooms, by retailer, 2015 (Est)

Victoria Plum makes the highest gains

Figure 24: Changes to distribution of bathrooms, by retailer, 2011-15 (Est)

Market Drivers

67% of adults prefer to shower

Figure 25: Attitudes towards bathing and showering – I prefer to shower Vs. I prefer to have a bath, October 2015

High level of interest in water saving

Figure 26: Interest in new areas of innovation, October 2015

Efficient use of water

Multi-generation households

Figure 27: Young adults living with their parents, by age and gender, 2015

Water meters in 48% of homes

Housing Stock and the Housing Market

Number of UK homes will grow 4% in five years

The housing market

**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

Bathrooms and Bathroom Accessories - UK - August 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.

Figure 28: Property transactions in the UK, 2007-17

Changes in the buy-to-let market

17% live in private rented property

Figure 29: Household tenure, June 2016

52% of those in private rented property are 16-34

Figure 30: Household tenure, by age, June 2016

Home extensions and improvements

Figure 31: Extensions and conservatories in the last three years, by age and socio-economic group, November 2015

Regulatory and Legislative Changes

Voluntary water labelling

Figure 32: Water labelling, 2016

Building regulations changed in 2010

Relaxation of planning rules

Companies and Brands – What You Need to Know

Ideal Standard is the UK's largest supplier

Retailers' expansion into bathrooms

Focus on full service

Promotional policies

Loyalty cards

Encouraging trade custom

Product innovation

Retail innovation

Suppliers

Takeovers

Key suppliers and their brands

Figure 33: Leading companies in the bathroom furniture and accessories market and their brands, 2015

Key supplier revenues

Figure 34: Selected leading bathroom suppliers, revenue MSP, 2011-15

Key supplier operating profits

Figure 35: Selected leading bathroom suppliers, operating profit, 2011-15

Retailers

Revenues of selected bathroom retailers

Figure 36: Selected leading bathroom retailers, total company revenues, 2011-15

Operating profits of bathroom retailers

Figure 37: Selected leading bathroom retailers, operating profits, 2011-15

Operating margin of bathroom retailers

Figure 38: Selected leading bathroom retailers, operating margin, 2011-15

Changes in the DIY sector

**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

Bathrooms and Bathroom Accessories - UK - August 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.

Attracting small builders
Bathstore is the only major specialist
Other bathroom specialists
Wren enters the bathroom market
Matalan Direct
IKEA serving a niche market
Other retailers

Competitive Strategies

Convenience is king
Wren adds bathrooms
Matalan adds bathrooms online
Focus on full service
B&Q goes an extra mile to assure people about its fitters
Exclusive branding elevates own-label
Never-ending sales
Loyalty cards
Encouraging trade custom

Launch Activity and Innovation

Virtual reality makes shoppers feel as though they are in the room
In-store touchscreens allow retailers to show broader ranges
Figure 39: CP Hart, touchscreen in-store, June 2016
Rimless toilets
Shower toilets
Spa experience in the bathroom
Figure 40: Kaldewei's Skin Touch technology in the bath, 2015
Connected home technology in the bathroom
Figure 41: Crosswater's digital shower, controlled via a smartphone app, 2015
A musical shower
Touch-controlled basin taps
Smart mirror for the bathroom

Advertising and Marketing Activity

£30.6 million advertising in 2015
Figure 42: Total above-the line, online display and direct mail advertising expenditure on bathrooms, 2012-15
Two online retailers in the top three advertisers
Figure 43: Above-the line, online display and direct mail advertising expenditure on bathrooms, top 10, 2012-15
Television dominates media spend
Figure 44: Above-the line, online display and direct mail advertising expenditure on bathrooms, by media, 2012-15
Advertising specifics

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

Bathrooms and Bathroom Accessories - UK - August 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.

Bathstore – “Bathrooms Matter”

Victoria Plum emphasises that its operating costs are cheaper

Victorian Plumbing features flying delivery vans

Advert banned for being misleading

Nielsen Ad Intel coverage

The Consumer – What You Need to Know

27% of bathrooms revamped in the last three years

People are most likely to appoint their own fitter

Broad appeal of bathroom accessories

DIY stores dominate the bathrooms market

Consumers’ store choice is highly influenced by services

Keeping things organised

Number of Bathrooms in the UK’s Homes

62% of homes have just one bathroom

Figure 45: Number of bathrooms in household, June 2016

55% of ABs have two or more bathrooms

Figure 46: Number of bathrooms in household, by socio-economic group, June 2016

Homeowners most likely to have more than one bathroom

Figure 47: Number of bathrooms in household, by household tenure, June 2016

Sharing bathrooms

Figure 48: Number of bathrooms in household, by number of people in the household, June 2016

Separate toilet/cloakroom in household

Figure 49: Separate toilet/cloakroom in household, June 2016

Owner-occupiers most likely to have separate cloakrooms

Figure 50: Separate toilet/cloakroom in household, by tenure, June 2016

Purchasers of Bathrooms and Cloakrooms

Young adults most likely to revamp bathrooms

Figure 51: Bathrooms/showers/cloakrooms fitted in the last three years, by age and socio-economic group, June 2016

Owner-occupiers are the key target group

Households likely to refit bathrooms one to three years following house move

Figure 52: Bathrooms/showers/cloakrooms fitted in the last three years, by household tenure and length of time in current home, June 2016

Londoners significantly more likely to refit bathrooms

Figure 53: Bathrooms/showers/cloakrooms fitted in the last three years, by region, June 2016

Elements of bathroom purchases

Figure 54: Selected bathroom fittings owned and bought in the last three years, June 2015

What They Spent on Bathroom Refits

Figure 55: Cost of refit by DIY, builder or retailer, June 2016

Who Refitted the Bathroom?

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

Bathrooms and Bathroom Accessories - UK - August 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.

47% appointed their own fitter

Figure 56: Refit by DIY, builder or retailer, June 2016

Trust in the builder

Figure 57: Refit by DIY, builder or retailer, by age and socio-economic group, June 2016

More than half of owner-occupiers appoint their own fitter

Figure 58: Refit by DIY, builder or retailer, by household tenure and length of time in current home, June 2016

Who had the most say in deciding where to buy?

Figure 59: Bathroom fitting decisions, June 2016

Figure 60: Bathroom fitting decisions, by who had the most say, June 2016

Bathroom Accessory Purchasers

Figure 61: Purchase of bathroom accessories, June 2016

Accessories have broad appeal

Figure 62: Purchase of bathroom accessories, by age and socio-economic group, June 2016

Broad appeal for accessories

Figure 63: Purchase of bathroom accessories, by household tenure and length of time in current home, June 2016

Replacement of bathroom fittings

Figure 64: Bathroom fittings replaced in the last 3 years, June 2016

Broad range of households have replaced fittings

Figure 65: Bathroom fittings replaced in the last 3 years, by household tenure and length of time in current home, June 2016

Where They Bought Bathrooms

DIY stores dominate the bathrooms market

Figure 66: Retailers used for bathroom furniture/fittings, June 2016

DIY retailers by age and socio-economic group

Figure 67: Retailers used for bathroom furniture/fittings – DIY retailers, by age and socio-economic group, June 2016

53% use one store

Figure 68: Retailers used for bathroom furniture/fittings, repertoire, June 2016

Bought in-store or online

Figure 69: How people purchased bathroom fittings bought in the last three years, June 2015

Factors Influencing Choice of Retailers/Suppliers

Figure 70: Factors influencing choice of retailers/suppliers, June 2016

Figure 71: Factors influencing choice of retailers/suppliers, owner-occupiers, June 2016

Importance of Bathroom Features

Storage to keep the clutter out of sight

Figure 72: Importance of bathroom features, June 2016

Key demographic differences

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research 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

Bathrooms and Bathroom Accessories - UK - August 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.

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