

Soap, Bath and Shower Products - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

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



“The soap, bath and shower market continues to be hindered by decreasing product usage, with competitive pricing strategies having a greater influence than new product innovations. There are, however, opportunities in the market to encourage trading up, such as focusing on lifestyle trends to promote the emotional and functional benefits of products, such as convenience.”

– Aidan Coen, Research Analyst

This report looks at the following areas:

- Increasing interest in bathing amongst a young audience
- Engaging young men with the SBS category
- A focus on hand washing offers new opportunities

This report covers the UK retail market for soap, bath and shower products (including specific male, female and family products – ie those that can be used on children and babies) and includes the following:

- Toilet soaps in both bar and liquid form, including hand washes
- Hand sanitisers
- Bath additives such as foam, crème, oil and bubble bath, bath pearls and beads and solid bath products such as salts, grains, crystals and cubes
- Shower products such as gels, mousses, body shampoos and body washes
- Products marketed as soap-free, such as Dove or Oil of Olay moisturising bars, as well as products such as Oilatum, which are formulated specifically for problem skin.

This Report excludes facial cleansers such as scrubs and foams, which are included in Mintel’s *Women’s Facial Skincare – UK, May 2016* and *Men’s Facial Skincare – UK, May 2016* Reports.

This report also excludes other bodycare products, used outside of a cleansing routine, as well as wash accessories such as sponges, loofahs, mitts, etc.

**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

Soap, Bath and Shower Products - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

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
- Excluded

Executive Summary

- The market
- A market in decline
 - Figure 1: Best- and worst-case forecast for UK retail value sales of soap, bath and shower products, 2011-21
- Companies and brands
- Competitive pricing challenges leading brands
 - Figure 2: Brand shares in the UK soap market, year ending November 2016
 - Figure 3: Brand shares in the UK bath and shower market, year ending November 2016
- Product development under pressure
 - Figure 4: New product development in the soap, bath, and shower category, by product type, 2014-16
- The consumer
- Decline in product usage
 - Figure 5: Usage of soap, bath, and shower products, October 2015 and November 2016
- Bathing continues to fall from favour
 - Figure 6: Change in frequency of bath, shower and hand-cleansing routines, November 2016
- Young men become more invested with bathroom routine
 - Figure 7: Change in frequency of additional bathing/showering routines, November 2016
- Hygiene and appearance are top concerns
 - Figure 8: Washing and bathing behaviours, November 2016
- Convenience is a priority
 - Figure 9: Interest in innovations in soap, bath, and shower products, November 2016
- Bathing/showering seen as a stress reliever
 - Figure 10: Attitudes towards soap, bath, and shower products, November 2016
- What we think

Issues and Insights

- Increasing interest in bathing amongst a young audience
 - The facts
 - The implications
- Engaging young men with the SBS category
 - The facts
 - The implications
- A focus on hand washing offers new opportunities

**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

Soap, Bath and Shower Products - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

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

The facts

The implications

The Market – What You Need to Know

A declining market

Value sales of soap buck the downward trend

Savvy shopping continues to shape the market

Meeting the challenges of an ageing population

Countering rising stress levels

The impact of new legislation

Market Size and Forecast

A market in decline

Figure 11: UK retail value sales of soap, bath and shower products, at current and constant prices, 2011-21

Market expected to struggle to grow

Figure 12: Best- and worst-case forecast for UK retail value sales of soap, bath and shower products, 2011-21

Forecast methodology

The impact of the EU referendum vote

Figure 13: Alternative market scenarios for the post-Brexit soap, bath and shower market, at current prices, 2016-21

Figure 14: Detailed post-Brexit scenarios for the soap, bath and shower market, at current prices, 2016-21

SBS products are still essential

Market Segmentation

Value sales of soap buck downward trend

Figure 15: UK retail value sales of soap, bath and shower products, by segment, 2015-16 (est)

Sales of bath products stagnate

Channels to Market

Savvy shopping continues to shape the retail landscape

Figure 16: UK retail value sales of soap, bath, and shower products, by retail channel, 2015 and 2016

Retail innovations boost sales through 'other' channels

Market Drivers

Ageing population provides challenges and opportunities

Figure 17: Trends in the age structure of the UK population, 2011-21

Figure 18: Ethical factors considered when shopping, by age, May 2015

Influence of discount stores

Figure 19: Frequency of shopping at discounters, June 2016

Benefiting the skin

Figure 20: Skin concerns experienced regularly in the last 12 months, by age, March 2016

Countering rising stress levels

Figure 21: Repertoire of causes of stress over last 12 months, October 2016

Legislative developments

**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

Soap, Bath and Shower Products - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

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

Ban on microbeads to alter product ingredients
The end of anti-bacterial soap?

Companies and Brands – What You Need to Know

Competitive pricing challenges leading brands
Skin-caring formulations as an opportunity for growth
Unilever drives down advertising spend
Dove excels in brand metrics
Lush benefits from fun and vibrant image

Market Share

Carex maintains its lead for soap products
Figure 22: Brand shares in the UK soap market, years ending November 2015 and 2016

Imperial Leather and NIVEA see a sharp decline in bath and shower
Figure 23: Brand shares in the UK bath and shower market, years ending November 2015 and 2016

Launch Activity and Innovation

Product development under pressure
Figure 24: New product development in the soap, bath, and shower category, by product type, 2014-16
Figure 25: Examples of new soap, bath, and shower launches with seasonal claims, 2015-16

Decline in true innovation
Figure 26: New product development in the soap, bath, and shower category, by launch type, 2014-16

Branded products increase share of new product development
Figure 27: New product development in the soap, bath, and shower category, own-label vs branded, 2014-16

Waitrose brand focuses on scent
Figure 28: New product development in the soap, bath, and shower category, top 5 ultimate companies plus other, 2016
Figure 29: Examples of new soap, bath, and shower launches from Waitrose (John Lewis Partnership), 2015-16

Botanical/herbal claims continue to dominate
Figure 30: New product development in the soap, bath, and shower category, by top 10 claims for 2015 and 2016
Figure 31: Examples of soap, bath and shower product launches with botanical/herbal claims, 2015-16

Taking care of the skin
Figure 32: Examples of soap, bath and shower product launches with moisturising claims, 2015-16

Advertising and Marketing Activity

Unilever drives down advertising spend
Figure 33: Recorded above-the-line, online display and direct mail total advertising expenditure on soap, bath, and shower products, 2014-16

Outdoor advertising shows promise
Figure 34: Recorded above-the-line, online display and direct mail total advertising expenditure on soap, bath and shower products, by media type, 2014-16
Figure 35: Baylis & Harding associate with The Great British Bake-Off, August 2016

In-store activities as an advertising tool

Johnson & Johnson returns with big push on adspend
Figure 36: Recorded above-the-line, online display and direct mail total advertising expenditure on soap, bath, and shower products, by top 5 companies plus other, 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

Soap, Bath and Shower Products - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

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

Unilever significantly reduces advertising spend

Figure 37: Recorded above-the-line, online display and direct mail total advertising expenditure on soap, bath, and shower products, by product type, 2015-16

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 38: Attitudes towards and usage of selected brands, December 2016

Key brand metrics

Figure 39: Key metrics for selected brands, December 2016

Brand attitudes: Dove is associated with confidence and care

Figure 40: Attitudes, by brand, December 2016

Brand personality: Lush is fun and vibrant

Figure 41: Brand personality – Macro image, December 2016

Pears and Radox are both basic

Figure 42: Brand personality – Micro image, December 2016

Brand analysis

Dove offers high quality and value

Figure 43: User profile of Dove, December 2016

Lush is a fun and vibrant brand

Figure 44: User profile of Lush, December 2016

Radox has broad usage while also being considered accessible

Figure 45: User profile of Radox, December 2016

Original Source appeals to women

Figure 46: User profile of Original Source, December 2016

Molton Brown not seen as offering good value

Figure 47: User profile of Molton Brown, December 2016

Pears users are older

Figure 48: User profile of Pears, December 2016

The Consumer – What You Need to Know

Decline in products used

Bathing continues to fall from favour

Young men become more invested with bathroom routine

Hygiene is a top concern...

...but appearance is also important

Seasons influence the bathroom routine

Packaging convenience in high demand

Demand for long-lasting fragrance and sensorial experiences

Bathing/showering seen as a stress reliever

Product Usage

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

Soap, Bath and Shower Products - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

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

Product usage in decline

Figure 49: Usage of soap, bath, and shower products, October 2015 and November 2016

Solid bath products maintain popularity

A focus on packaging convenience could tempt men

Figure 50: Repertoire of soap, bath, and shower products used in the last six months, by gender, November 2016

Changes to Bathroom Routines

22% are bathing less

Figure 51: Change in frequency of bath, shower and hand-cleansing routines, November 2016

Hand hygiene under greater scrutiny

Young men becoming more invested with bathroom routine

Figure 52: Change in frequency of additional bathing/showering routines, November 2016

Lifestyle and Bathroom Routine

Hygiene is top concern

Figure 53: Washing and bathing behaviours, November 2016

Appearance is important

Seasons can influence the bathroom routine

Time- and money-saving a priority

Interest in Innovation

People want convenience

Figure 54: Interest in innovations in soap, bath, and shower products, November 2016

Desire for long-lasting fragrance is high

Demand for products that offer a more sensorial experience

Attitudes towards Soap, Bath and Shower Products

Bathing/showering to relieve stress

Figure 55: Attitudes towards soap, bath, and shower products, November 2016

Older people stick with what they know

Baby care products appeal to adults

Promoting skincare benefits as more than 'just a gimmick'

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

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