

Bathrooms and Bathroom Accessories - UK - August 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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



“Consumers are attracted to retailers that can offer a full planning and design service, highlighting the importance of attracting and training good staff in stores. Those retailers that think beyond designing a basic layout, to adding storage and stylish features, will add value to a bathroom makeover.”

– Jane Westgarth, Senior Market Analyst

This report looks at the following areas:

- Are shoppers flocking to online sellers?
- What are the key factors influencing choice of retailer?
- What is the impact of the rise in private renting on demand for bathrooms?

The market for bathrooms rose in 2017, with consumer expenditure set to rise by 2021. Our research shows that people are most likely to revamp a bathroom up to five years after moving house, so the strength of the housing market and consumer confidence play a significant role in shaping demand. The pattern of the housing transactions in 2016-17 make it difficult to draw exact comparisons, but the market in the six months to May 2017 was down on the same months in the previous year. Uncertainty following the UK’s vote to leave the EU is encouraging households to defer decisions like moving house or undertaking big-ticket room makeovers. Full bathroom refits are mostly discretionary, but bathroom accessories are a lower-cost way of breathing new life into bathrooms – which is important for homeowners who want a low-cost refresh, or renters who want to inject their own look into a 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

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 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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
 Cautious outlook as housing transactions slow
 Figure 1: Consumer spending on bathroom fittings and furniture, 2012-22
 Practical storage plus attractive styling boosts bathroom accessories
 Showers and cabinet furniture popular in today's bathrooms
 Figure 2: Market for bathroom fittings and accessories, by segment, 2017 (est)
 Stamp duty changes disturb the housing market
 Companies, brands and innovation
 Concentration of the market
 Figure 3: Distribution of bathrooms, by retailer, 2017 (est)
 Key suppliers and their brands
 High growth for bathroom specialists
 Pureplay online sellers growing rapidly
 Attracting small builders
 Alternatives to out-of-town sites
 Better visuals for bathroom designs
 Growth of the smart home
 The consumer
 Just one bathroom in 67% of homes
 44% of households repaired or updated bathrooms in the last 3 years
 58% of owner-occupiers appointed their own bathroom fitter
 B&Q is, by some distance, the most-used retailer for bathrooms
 Figure 4: Retailers used for most recent bathroom project, June 2017
 Service influences shoppers
 Figure 5: Factors influencing choice of retailer, June 2017
 Broad spread of interest in advanced bathroom innovation
 Figure 6: Interest in innovative bathroom products, June 2017
 What we think

Issues and Insights

Are shoppers flocking to online sellers?
 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

Bathrooms and Bathroom Accessories - UK - August 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

What are the key factors influencing choice of retailer?

The facts

The implications

What is the impact of the rise in private renting on demand for bathrooms?

The facts

The implications

The Market – What You Need to Know

Cautious consumers defer spending

Slow growth between 2017-22

Showers and cabinet furniture popular in today's bathrooms

Rise of the multiple groups

Rise of online bathroom specialists

Changes among DIY retailers

Two thirds of adults prefer to shower

Efficient use of water

The age of the smart meter

More multi-generation households

Stamp duty changes disturb the housing market

Market Size and Forecast

Cautious consumers defer spending

Figure 7: Consumer spending on bathroom fittings and furniture, 2012-22

Figure 8: Consumer spending on bathroom fittings and furniture, 2012-22

Figure 9: Consumer spending on bathroom accessories, 2012-22

Forecast methodology

Market Segmentation

Showers and cabinet furniture popular in today's bathrooms

Figure 10: Market for bathroom fittings and accessories, by segment, 2017 (est)

Strong demand for showers

Figure 11: Bathroom fittings market, by segment, 2012-17 (est)

Fitting furniture in the bathroom

Innovation in the shower market

Shower heads are a style highlight in the bathroom

Statement features encourage consumers to spend more

Innovation in WCs

Larger mirrors

Advances in lighting and controls

Channels to Market

Concentration of the 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 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

Figure 12: Distribution of bathrooms, by retailer, 2017 (est)

Rise of online bathroom specialists

Changes to the DIY market

Market Drivers

13% of adults shower more frequently

Figure 13: Changes to bathroom routines, November 2016

Efficient use of water

The age of the smart meter

More multi-generation households

Figure 14: Living with parents, by age, 2000-16

Stamp duty changes disturb the housing market

Figure 15: Housing transactions, December 2015-May 2017

How consumers feel about their finances

Figure 16: Trends in how respondents would describe their financial situation, January 2015-June 2017

Companies, Brands and Innovation – What You Need to Know

Key suppliers and their brands

High growth for bathroom specialists

Pureplay online sellers growing rapidly

Attracting small builders

Alternatives to out-of-town sites

Different approaches to branding

Jostling for price leadership

Bathrooms could be monitoring health

Smarter bathrooms could aid the beauty market

Growth of the smart home

Better visuals for bathroom designs

Companies and Brands – Suppliers

Key suppliers and their brands

Figure 17: Leading companies in the bathroom furniture and accessories market and their brands, 2017

Key supplier revenues

Figure 18: Selected leading bathroom suppliers, revenue MSP, 2012-16

Key supplier operating profits

Figure 19: Selected leading bathroom suppliers, operating profit, 2012-16

Companies and Brands – Retailers

High growth for bathroom specialists

Pureplay online sellers growing rapidly

Big changes in the DIY sector

Figure 20: Selected bathroom retailers, turnover, 2012-16

**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 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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 no longer selling bathrooms

IKEA serving a niche market

Non-specialists in the bathroom market

Competitive Strategies

Alternatives to out-of-town sites

Matalan adds bathrooms online

Focus on full service

B&Q goes an extra mile to assure people about its fitters

Different approaches to branding

Over-reliance on discounting

Loyalty cards

Encouraging trade custom

Launch Activity and Innovation

Your bathroom could be monitoring your health

Smarter bathrooms could aid the beauty market

Figure 21: Google ideas does a smart bathroom, 2016

Growth of the smart home

Safer shower trays address an ageing demographic

Figure 22: Anti-slip shower tray from Kohler Mira, 2017

Grohe's Red Dot awards recognise exceptional design

Figure 23: Grohe Sensia Arena shower toilet, 2017

Bathstore launches augmented reality service

Creating better toilets for third-world communities

Advertising and Marketing Activity

Static advertising spend over three years

Figure 24: Total above-the line, online display and direct mail advertising expenditure on bathrooms, 2013-16

Bathstore is the largest advertiser of bathrooms

Figure 25: Total above-the line, online display and direct mail advertising expenditure on bathrooms, by advertiser, 2013-16

Television accounts for over half of adspend

Figure 26: Above-the line, online display and direct mail advertising expenditure on bathrooms, by media, 2016

Advertising specifics

Figure 27: Bathstore, Advertising image, 2016

Figure 28: Victoria Plum, Advertising image, 2016

Figure 29: Victorian Plumbing, Flying Van, September 2016

Nielsen Ad Intel coverage

**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 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

The Consumer – What You Need to Know

- Just one bathroom in 67% of homes
- 44% of households repaired or updated bathrooms in the last 3 years
- 58% of owner-occupiers appointed their own bathroom fitter
- B&Q is, by some distance, the most-used retailer for bathrooms
- Service influences shoppers
- Broad spread of interest in advanced bathroom innovation

Bathrooms in the UK's Homes

- Two thirds of UK homes have just one bathroom
Figure 30: Number of bathrooms in household, June 2017
- 29% of homes have a separate toilet/cloakroom
Figure 31: Separate toilet/cloakroom in household, June 2017
- Owner-occupiers are more likely to own a separate toilet

Bathroom Installations and Repairs

- 44% of households repaired or updated bathrooms in the last 3 years
Figure 32: Bathroom installations and repairs in the last three years, June 2017

Who Fitted the Bathroom?

- 58% of owner-occupiers appointed their own bathroom fitter
- People choose fitters on trust
- Retailers must cater to the needs of builders
- 23% of bathrooms are DIY projects
Figure 33: Who fitted the bathroom?, June 2017

Spend on Most Recent Bathroom Project

- People spend around £1,000 on fittings
Figure 34: Spend on most recent bathroom project, June 2017

Retailers Used for Last Bathroom Project

- B&Q is the most-used retailer
- IKEA popular with private renters
- Scope for expansion for Bathstore
Figure 35: Retailers used for most recent bathroom project, June 2017

Factors Influencing Choice of Retailer

- Simple to compare prices
- The importance of trust
- Will bathroom retailers lose share to the internet?
- Showrooms remain relevant
- Technology can help visualise
- Spreading the cost

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 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

Figure 36: Factors influencing choice of retailer, June 2017

Interest in Innovative Bathroom Products

42% want a self-cleaning toilet

A clear view in the mirror

Emerging interest in smart bathrooms

Figure 37: Interest in innovative bathroom products, June 2017

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