

# WATER works

BATH & SHOWER

The bath and shower sector is reliant  
on fulfilling customer demand

The bath, shower and soap market is currently worth £650m, according to Mintel. The maturity of the market means that constant innovation and investment are crucial, and manufacturers have identified clear consumer demands that have shaped recent launches.

## BATH TIME DECLINE

Mintel says that the positioning of bath products as 'relaxing' and 'indulgent' encourages consumers to believe that they don't have time for baths. Rhodri Morgan, Imperial Leather brand manager, says this is reflected in the brand's own research: "Looking at long term trends, we have certainly seen a steady decline in the number of washing occasions where people opt for bathing. As a nation we are becoming increasingly time poor, which means that taking a shower can be much more efficient. There is also the issue of cost - taking a shower is more cost effective than taking a bath because it uses less water." In spite of this, manufacturers are still focusing on bathing product innovation. Morgan explains: "I don't think we should diminish the importance of taking a bath. It allows people some 'me' time, when they can relax in a warm, peaceful environment without distractions. Consumers have told us that they want a bath to be a special personal occasion, and we've developed products to meet these needs." So, while bathing occasions are declining, when people do take a bath they want to use products that make the occasion special, leading to increasing demand for luxurious products. Because people are showering more often than ever this demand for luxury extends to the shower product sector as well. The credit crunch has also contributed to this. Margaret Jobling, marketing director for Sara Lee Household & Bodycare (H&BC) UK, manufacturer of Radox, says: "It is widely recognized that consumers are looking to secure the same standards of life as before, but are achieving this through lower cost routes and 'at-home' experiences. This applies to treats such as spa days and treatments. Radox has recognized that the spa at home experience is becoming a focus for our consumers and is answering this through its Wellbeing portfolio, with products inspired by the spa experience."

## SPA INSPIRATION

There are several ways in which manufacturers are making their products more 'spa' inspired and luxurious. The first is through more premium ingredients such as monoi oil, used in Imperial Leather's Skinbliss range, previously limited to premium propositions. Another is through the creation of limited edition ranges. Jobling says: "Limited edition variants bring new and exciting trends to the washing and bathing market, allowing mass brands to adapt trends from prestige



brands and interpret them for the mass market." Limited editions often use innovative ingredients and fragrances to offer a point of difference; Radox's Experience Africa range, for example, will launch later this year featuring indigenous African ingredients to create exciting, exotic blends with impactful and exciting fragrances. Fragrance trends are also leaning towards gourmand scents, according to Morgan, with blends such as honey and vanilla or sugar and almond gaining shelf space.

“ Limited edition variants bring new and exciting trends to the washing and bathing market ”

The luxury trend is also extending to what consumers want to put on their bathroom shelves. Kathy Philips, creator of This Works, says: "Consumers are beginning to demand good design - they want a product that looks good on their shelf. The fascination with home decoration on TV and celebrity lifestyles has made them more aspirational about their products."

Another key consumer demand is for skincare benefits. The proliferation of cream and oil formats in both the bathing and showering sectors has enabled products to offer more than just cleansing, which not only makes consumers feel that they are doing good for their skin but also getting value for money.

Morgan says: "Moisturisation is key to many consumer's needs as they seek to look after and maintain their skin. This is partly driven by trends towards increased convenience: with less time on their hands, more consumers want to avoid having to spend extra time applying lotion after they have showered. A recent format that combines the trends for luxury and skincare is Dove's Supreme Cream Oil body wash,

## SALES PATTERN

Encourage consumers to trade up to more luxurious products by telling them about limited edition variants they may not have heard about.

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a pampering, luxurious formula with skin caring benefits. The Supreme Cream Oil format has now also been extended to a bath cream - Dove Supreme Beauty Bath - which offers a creamy, luxury format for a pampering bath.

## IT'S ONLY NATURAL

The naturals craze has reached the washing and bathing sector, and while 100% natural and organic products remain largely within the niche offering, mass brands are incorporating increasing numbers of naturally-inspired or derived ingredients in order to capitalise on this. Kathy Phillips says: "There is a growing demand for the natural from the consumer. Ecology, the state of the planet, our carbon footprint and how ethical we are, are all questions being asked more and more. The consumer wants to lead a healthier lifestyle, if it's made easier for them and the products are good." Romain Vitali, founder of organic bathing and body care brand Suzanne Aux Bains, adds: "Consumers are now more sensitive to the environment and to cosmetics companies that aim to preserve the soil and water resources of our planet by prohibiting the use of pesticides and chemical fertilizers, and also use recyclable packaging."

## FORWARD FOCUS

The future of the bath and shower sector looks healthy, with Mintel predicting it will achieve value sales of £730m by 2013, although as with most sectors, it will be a tough trading environment while the recession continues. Margaret Jobling says: "Recently, grocers have been focusing on a 'less is more' approach to the washing and bathing category, being driven by the need to cut operating costs and secure efficiencies within the current touch trading environment. This will mean a focus on key brands and a rationalisation of product offerings. We predict the consumer is likely to see fewer brands on the fixture with a more consolidated range."

**Dove** is building on the success of its Supreme Cream Oil luxury body wash by extending the range into the bath, liquid hand wash and beauty cream bar categories. Julie McCleave, senior skin category manager at Unilever UK, says: "Since its launch in 2007, Dove Supreme Cream Oil Body Wash has been hugely successful - the shower variant has brought 140,000 new consumers into the Dove brand. Our innovative new additions to the range will drive this success and continue to encourage trade-up to a more luxurious cleansing experience." The new additions are Dove Supreme Beauty Bath, a luscious creamy bubble bath in Sleek Satin, Luscious Velvet and Supreme Silk variants; Dove Supreme Oil Bar Silk indulgent hand soap in Sleek Silk, available in a twin pack; and Dove Supreme Beauty Cream Wash, a moisturising liquid hand wash in Supreme Silk and Luscious Velvet variants.

**Price:** rsp from £1.14

**Manufacturer:** Unilever UK

**Contact:** 01372 945 000



**Radox** has refreshed the look and feel of its entire product collection in 2009. Shower, bathing and hand wash packaging has been given a modern and premium look and feel, and the traditional Radox logo has been rejuvenated to reflect this brand reinvigoration. Radox has also introduced a new Wellbeing collection to its range. The Mineral Spa and Tea Infusions ranges are packed with natural ingredients that care for the body and calm or energize the mind. Radox is also hoping to build on the success of its original Shower Smoothies range, recently voted Body Wash Product of the Year 2009, with the launch of two new fruity variants: Tropical Tranquility and Spirit Booster, both continuing the promise to deliver a



luxury performance and skin feel to the Radox customer.

**Price:** rsp from £1.99

**Manufacturer:** Sara Lee Household & Body Care UK

**Contact:** 0175 352 3971

## TOP 10 BRANDS

### Bath Products

- 1 Radox
- 2 Own Label
- 3 Johnson's Baby
- 4 Imperial Leather
- 5 Palmolive
- 6 Dove
- 7 Sanex
- 8 Badedas
- 9 Matey
- 10 Infa Care

### Shower Products

- 1 Imperial Leather
- 2 Radox
- 3 Lynx
- 4 Own Label
- 5 Palmolive
- 6 Dove
- 7 Original Source
- 8 Sanex
- 9 Johnson's
- 10 Nivea

■ Shower products dominate the £650m soap, bath and shower market, accounting for 45% of total value sales (£293m), followed by bath additives (£149m), liquid soap (£113m) and bar soap (£95m).

■ Paraben-free products accounted for nearly one in five new product launches from January to July 2008.

■ One in five adults say they tend to have more baths in the winter than in the summer.

■ Although the market is dominated by a handful of leading manufacturers, almost seven in 10 new product launches between January and July 2008 came from smaller suppliers.

■ Between January and August 2008, bath additives and liquid bath foam accounted for just 6% of all advertising spend on soap, bath and shower products.

■ Mintel predicts the total market value sales of bar soap, liquid soap, bath and shower products to grow at a rate of 12% to reach £730 million over the forecast period up to 2013.

