

BRAND FOOTPRINT

THE UK RANKING OF THE MOST CHOSEN HOMECARE BRANDS

MAY 2017



KANTAR WORLDPANEL

HOME CARE

Introduction

The homecare sector faced a decrease in value of 0.4% in the year to October 2016, whilst volumes increased 8%. This dichotomy was driven by the supermarket retailers reducing prices and offering promotions as they sought to compete with the discounters.

While homecare is a sector of necessity rather than high excitement for some, others take great pride in their home environment and caring for their pets. Consequently, for brands operating in this area, activity focuses on either driving interest through innovation, standout efficacy and quality, or through providing greater value and convenience.

Channel Strategy

Generally homecare is purchased as part of the big family shop and so value is one of the key drivers across categories. Sales of homecare products are split across several different channels, which complicates the manufacturer's ability to drive engagement with their brand.

Discounters are growing as a whole, and performing particularly strongly in household, which causes a problem for those brands they do not stock. The discounters' own label lines are very successful, with strong offers from products like Magnum washing up liquid and Auto Dish tablets which have received a Good Housekeeping endorsement. Homecare sales in Aldi and Lidl are up 18.7% and 13.3% respectively over the year. This brings their total share of the homecare market to 6%, a considerable under trade compared to fresh foods. Bargain stores account for another 6% of sales in the sector.

In the same time period, own label saw an increase in value of 2.7% while branded products fell by 1.8%, a decrease in value for the sector of £26m.

As a relatively bulky, routine purchase,

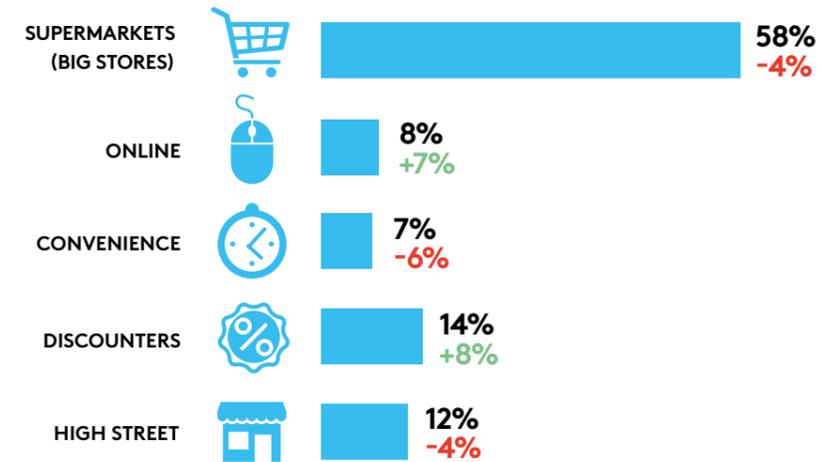
UK Top 20 table		CONSUMER REACH POINTS (MILLIONS)		
		2015	2016	YR/YR %
1	FAIRY	104	109	5
2	ANDREX	82	82	1
3	COMFORT	62	69	11
4	PEDIGREE	67	66	-2
5	WHISKAS	68	63	-7
6	FELIX	65	62	-4
7	LENOR	54	49	-10
8	KLEENEX	39	43	10
9	DETTOL	38	42	10
10	PERSIL	47	41	-13
11	DOMESTOS	38	40	5
12	VELVET	44	36	-17
13	FLASH	35	36	2
14	NICKY	35	36	1
15	PLENTY	34	34	-1
16	GLADE	35	33	-5
17	ARIEL	31	31	-3
18	AIRWICK	30	31	1
19	GOURMET	26	30	16
20	BAKERS	32	28	-12

52 w/e October 2016

both online and direct-to-consumer channels seem like attractive possibilities for this sector. Amazon launched its Dash button in the UK in September 2016 for a range of 40 brands initially including Airwick (#18), Ariel (#17) and Whiskas (#5). The buttons are available to subscribers of Amazon Prime, and designed to

be kept in a convenient place so that they can be pressed when a product is running low - triggering an order for more to be delivered. The next step in their development will be to integrate with Internet of Things appliances which automatically re-order their own supplies when they run low.

SHARE AND GROWTH OF HOME CARE BY CHANNEL



Premium Homecare

If at one end of the scale the sector is about value and convenience, at the other there seems to be plenty of headroom for brands offering something that consumers can get excited about. Fairy is the top brand in the sector and has enjoyed a CRP increase of 5% with innovations in dishwashing and laundry this year. Fairy also entered into the gender debate with a Facebook campaign on International Women's Day in 2016 asking "How Fair Is Your Home?" which highlighted that women still spend 117 minutes more each day than men on household chores.

The branded fabric conditioner sector is now worth £373m following 7.5% value growth and a 3.7% increase in volume during the last year, driven largely by Lenor and Comfort. Lenor, in position 7 this year, is growing from a value perspective but not adding buyers at the same rate. Comfort, in third position, enjoyed a 11% increase in the last year continuing to build on the 'better for the environment' ultra-concentrated Intense format. In April 2016 Comfort launched Fragrance Burst (since renamed Intense Perfume Pearls) to compete with Lenor's Unstoppables in the fragrance booster market. It was well-distributed at

launch and reached 600,000 shoppers by the year-end.

Brands in the paper-products sector continue to struggle against own label with a decrease of 0.8% for brands set against an increase of 2.3% for own label. But as with detergents, when the consumer is offered something which clearly communicates a differentiating factor that resonates, they are often prepared to pay more. Andrex, the second-highest brand in the ranking, increased CRPs by 1% aided by the new moist toilet-wipes Washlets. The launch was supported with the light-hearted "How Andrex Do You Feel?" campaign, showing how hard adults find it to talk about their toilet habits compared to children. Kleenex in 8th position also managed to cut through in this tough category, with increases in both penetration and frequency resulting in a CRP increase of 10% this year.

Pet food brand Gourmet has enjoyed the biggest increase in this year's Top 20 with a 16.3% rise in CRPs. Premiumisation is even a trend for pet food it seems, and Gourmet created a new occasion this year with the launch of "soups". As a luxury item, it is attracting younger shoppers to the brand. Other smaller innovations and improvements from the Gourmet brand

Brand Focus: Bloo

Owned by household cleaning manufacturer Jeyes, Bloo is in position 37 in this year's ranking with an increase in CRPs of 9.7%. This success stems from their Foam Aroma toilet powder, launched in January 2016. This innovative new product is a cleaning powder which foams and releases a fragrance when poured into the toilet bowl. Consumers benefit from both the scent and lime scale removing properties.

This appears to not only have created a unique format in the market but also one that has been lucrative for the brand. The launch of Foam Aroma has brought in over £7.7 million for Bloo since launch. This has been grounded in penetration growth, with 6.7% of households now having purchased a Foam Aroma product.

have resulted in retailers increasing the space allocated to luxury pet food.

More than Clean

While innovation and premium products are one way to deliver growth, offering something a little bit different can also prove successful for brands in this sector. Kitchen towel brand Regina worked against the overall decline for branded products in the category and attracted more than half a million additional shoppers in a year. This resulted in a CRP increase of 14.7% for the brand in position 14. By producing bigger rolls in single or double roll packs, Regina offers something quite different to other brands in this space where the focus tends to be on multipacks. It has also taken advantage of ecommerce, growing sales through this channel by 51% in the year.

Dettol, the fastest riser in the global ranking, is in 9th place in the GB ranking, with a CRP increase of 10%. Dettol continues to strengthen its position as an anti-bacterial germ killer, appealing to all demographics. It has managed to increase penetration and average spend in a tough, competitive market – 44.2% of homes buy a Dettol product in Great Britain with an average spend of £8.32, up 7% on the previous year. Whilst the brand has seen growth in traditional areas such as anti-bacterial cleaners and wipes, Dettol has also expanded into other areas such as Laundry Sanitiser and a Washing Machine cleaner.

Domestos is seeking to contribute to society with its UNICEF partnership which aims to improve access to a toilet for 25 million people by 2020. In this year's ranking it is at position 11 with a 5% increase in CRPs. One reason behind the strong performance this year is the launch of new products in the 'Power5' Rim Block range. The Unilever brand also broadened appeal

Possible Disruptors



GROWTH OF DIRECT-TO-CONSUMER



REGULATION



CHANGING HOUSEHOLD SIZES

in bleach with differentiated products such as Pink Power and Ultra White and Sparkle.

Caring for the environment is another area where brands can seek to differentiate in the homecare sector. Fairy announced in mid-2016 the removal of all phosphates from retail and commercial dishwasher tablets by 2017. Borne out of Unilever's Sustainable Living Plan, Persil in position 10, sells a refill pack option to offer better value and less plastic than traditional packaging.

Homecare brands evidently remain popular with consumers seeking quality products. Shoppers browsing the homecare aisle can be tempted to search for the cheapest price unless a clear benefit is conferred by the brand. Where imagination and consumer insight are successfully applied to create innovative products, there is clearly the opportunity for brands to grow considerably even in seemingly crowded or low-involvement categories.

About Brand Footprint

Kantar Worldpanel believe that in order to grow brands need to be chosen more often by more people.

There are five strategic levers which we have identified that lead to brand growth.

Now in its fifth year, Brand Footprint is our global study of which brands shoppers are choosing to buy, and why. The metric used to measure this is called Consumer Reach Points (CRP) and it is calculated by looking at penetration and frequency in combination with the number of households in the country.



Find the full global report at www.kantarworldpanel.com/brand-footprint-ranking