

# BRAND FOOTPRINT

THE UK RANKING OF THE MOST CHOSEN HOMECARE BRANDS

MAY 2018

KANTAR WORLDPANEL

# HOMECARE

The Homecare sector has grown in value by 0.6% over the past year. While a welcome contrast to last year's decline of 0.4%, it lagged the overall grocery market which grew 2.4% over the same period. The story was no better in volume terms as the sector saw a slight decline of 0.5% on the previous year. Volumes were not helped by the reduction of promotional activity, particularly fewer multibuy across all the household categories.

The overall figures mask the differing performance between branded and own label lines. Brands still accounted for 67% of value sales and 55% of volume but declined across both metrics. In this context it was not surprising that in the Brand Footprint ranking only four of the top 20 brands grew Consumer Reach Points (CRPs).

## Products that Deliver

Despite the challenging environment, some brands still found growth through innovation and well communicated

It's been  
a challenging  
year for  
Homecare  
Brands with  
own label  
gaining  
market share

UK Top 20		CONSUMER REACH POINTS (MILLIONS)		
		2016	2017	YR/YR %
1	FAIRY	109	104	-5
2	ANDREX	82	73	-11
3	COMFORT	69	66	-5
4	LENOR	49	48	-1
5	KLEENEX	43	45	5
6	DOMESTOS	40	40	0
7	DETTOOL	42	39	-7
8	FLASH	36	34	-4
9	GLADE	33	34	3
10	NICKY	33	33	0
11	PERSIL	40	32	-20
12	PLENTY	34	30	-10
13	REGINA	25	29	18
14	AIR WICK	30	29	-6
15	VELVET	36	28	-22
16	ARIEL	31	28	-10
17	SURF	27	24	-12
18	DUCK	19	22	16
19	MR MUSCLE	24	22	-9
20	BOLD	23	22	-7

efficacy. The toilet cleaning brand Duck, in position 18, with a CRP growth of 16%, was an example of this. The brand created a range of powerful and multi-purpose products, with the 5-in-1 Power Blocks and Deep Action Gel the primary drivers of growth. In addition, Duck helped consumers personalise their

environment by creating a range of fragrances (beyond pine and citrus) including lavender, marine and mint. During the year, Duck managed to acquire nearly 900,000 additional brand buyers. Almost a third (30%) of British homes purchased a Duck product in 2017 leading to record brand sales of £42m.





Domestos, in position six in the ranking, moved up two places due to the Rim Block product which saw an increase in sales of 84% during the year. The key line was the multi-purpose 5-in-1 product, and more listings and space in store helped consolidate CRPs.

Although a challenging year lead to a decline in CRPs overall, Persil in position 20 launched the premium Powergems product in June 2017. After 10 years of development this was a new format offering stain removal, freshness and care for clothes. The launch was well supported with an above-the-line campaign targeted promotion at Oxford Circus tube station. Persil Powergems aimed to drive value back into the category, with an average cost per use of 22p, nearly double the category average of 13p.

### Budget Busters

When brands didn't offer a perceptible point of difference worth spending

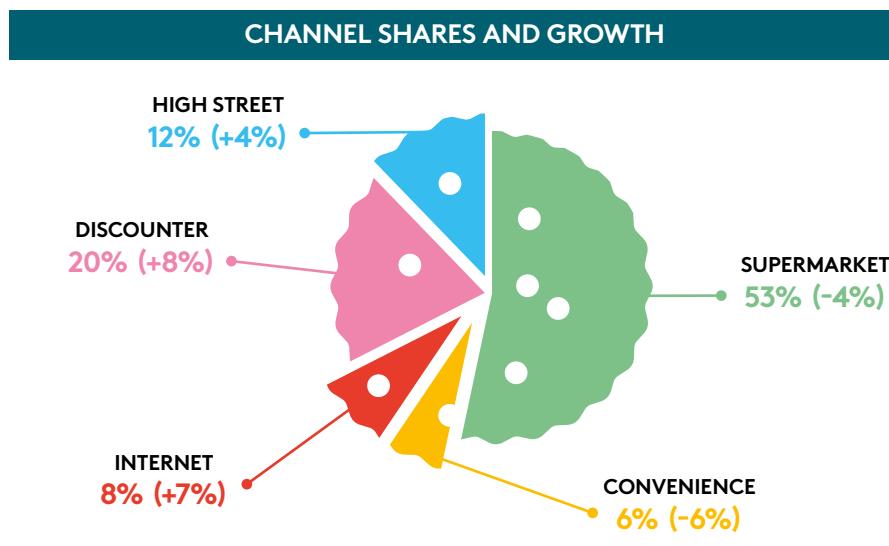
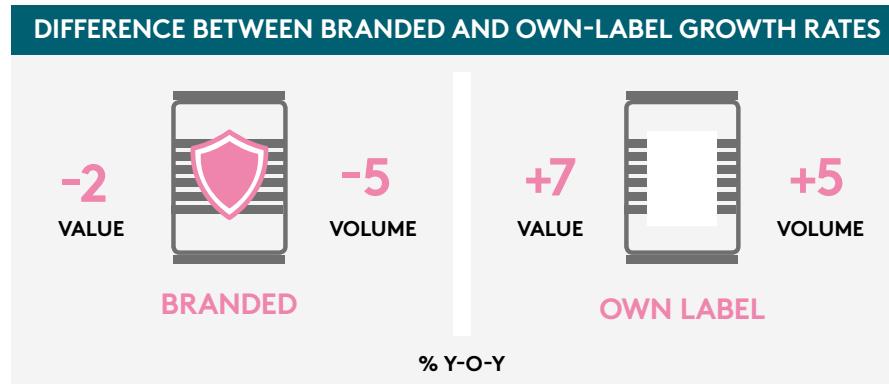
more on, consumers reverted to choosing cheaper options. This often meant visiting retailers known for selling homecare products cheaply. As a result brands both large and small had to consider their presence in discount retailers.

The big four supermarkets all saw declines in homecare value sales as they strived to put cheaper own-label products at eye-level to the detriment of the more expensive branded lines.

The big winners in terms of retailers were Aldi (up 18%), Lidl (up 3%), and the bargain stores such as B&M and Home Bargains (up 13%). Bargain stores have a large over-trade in homecare products but the largest over-index compared to grocery as a whole is at Wilko, which holds a 4% share of the household market, compared to a 1% share of grocery.

Many of the brands that performed strongly further down the ranking were ones available in the discount and bargain stores. Zoflora, in position 33, had a 11% increase in CRPs for example. This was due to listings in the bargain stores where they grew 29%. Even Fairy, the biggest brand in the sector gained double-digit growth in the discounters, helped to some extent by a temporary listing in Lidl.

Budget brand Easy, in position 35 with a growth of 11% in CRPs, had strong distribution in the discount channel, with Iceland and Poundland particularly important for sales. Washing-up liquid and detergents such as Easy 3-in-1 Bio Powder performed well as shoppers traded down from the big brands. The brand increased both penetration (6%) and frequency (4%). Oust, in position 36, took on own label securing wide distribution in discounters at the 99p price point for the aerosol air



freshener. Over 50% of Oust sales are outside the main supermarkets and they have added over 150,000 shoppers in the last year.

### Paper money

Paper products make up by far the largest part of the homecare sector, around 24% in both volume and value terms. Increased value sales of the total sector were driven by paper products, which added over £20 million. However, it was a story of two halves as paper products were also the biggest contributor to branded declines as shoppers bought less frequently and increasingly switched to own label. Indeed, own label paper was up 9%, and the biggest contributor to the growth of the own label household market.

Regina, in position 13, had a stellar year with 18% growth in CRPs including the acquisition of Thirst Pockets (see brand focus). Nicky,

in position 10, benefitted from availability as both toilet and kitchen tissues which boosted both reach and frequency. Nicky was most prominent in discount retailers, however its lemon variant was successful in Waitrose.

Kleenex, in position 5, increased CRPs by 5% and continued to dominate the facial tissue market, accounting for 45% of the category. Own label also has a 45% share which meant that smaller brands struggled to challenge Kleenex's position. The brand has mainly seen growth through increased frequency with the Ultra Soft format performing strongly growth although Balsam has also contributed.

Shoppers were attracted by these "added value" propositions. Kleenex has also benefited from a particularly strong winter season, as shown by the cold and flu remedies category growing by 15%.

### Brand Focus: Regina

The Regina brand acquired Thirst Pockets, expanding its portfolio to rival leading brand Plenty. This helped Regina bring 2.3m more shoppers into the brand. Regina also launched Regina Wish, positioned as being the only kitchen roll with handy sized sheets to can be used for every kind of kitchen spill. There was also a "waste less" message from Regina Wish which appealed to environmentally conscious consumers. This was supported by above the line campaigns, with Regina really stepping up presence on television in the last year. The core Regina Brand, Blitz continued to build on last year, with new shoppers at the heart of the growth. Online continues to be a key driver, with Regina Blitz up 27% in the channel.

### The Green Agenda

The homecare sector is heavily reliant on chemicals and plastic packaging, both of which are coming under increasing scrutiny. This is something that all brands are aware of, and last year for example Fairy withdrew the use of phosphates from the whole of its dishwasher tablets range globally.

The Plastics Pact has been recently launched in the UK as a response to the current backlash by consumers on the amount of wasted packaging. The pact is a voluntary agreement supported by retailers and manufacturers coordinated by WRAP, with the aim of cutting single-use plastic. It has the aspiration that by 2025 all plastic packaging will be reused, recycled or composted.

Two environmentally-friendly brands to have benefited from the growing awareness around these issues are Ecover and Method. They are now owned by the same company, People

Against Dirty, which champions planet-friendly formulations. Ecover is in position 31 of the ranking with a CRP increase of 25% and had a strong performance in detergents, automatic dishwash and washing up liquids. The brand is distributed in Tesco, Sainsbury's and Waitrose.

Sister brand Method in position 49 moved up 12 positions and increased CRPs by 47% - driven by both penetration and frequency gains. There was particular growth in liquid cleaners, with spending on the brand up by 125%.

This year's homecare sector ranking shows just how hard it is for brands to cut through against own brands and the budget lines distributed through discount retailers. A clear, strong proposition and point of difference is perhaps more crucial in this market than any other. Where bigger brands have achieved listings in discounters it has been sales positive for them, but the long-term strategy needs to be

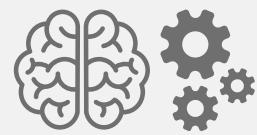
## Future Trends



Smart products  
that use **less water**



Naturally-derived  
packaging materials



Machines that  
order their own  
consumables

carefully considered to make sure that the focus on price isn't eroding the brand equity they have spent so long establishing. Homecare is one sector which is particularly relevant for online and Direct-to-Consumer sales. As the take-up of home assistants such as the Amazon Echo and Google Home grows, their ability to take the work out of shopping for everyday essentials might be an opportunity that smart brands can exploit.

A clear,  
strong point  
of difference  
is crucial

## About Brand Footprint

**Kantar Worldpanel believe that brands grow by increasing the number of people that buy them, their penetration. There are five strategic levers which we have identified that lead to brand growth.**

**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 [kantarworldpanel.com/brand-footprint-ranking](http://kantarworldpanel.com/brand-footprint-ranking)