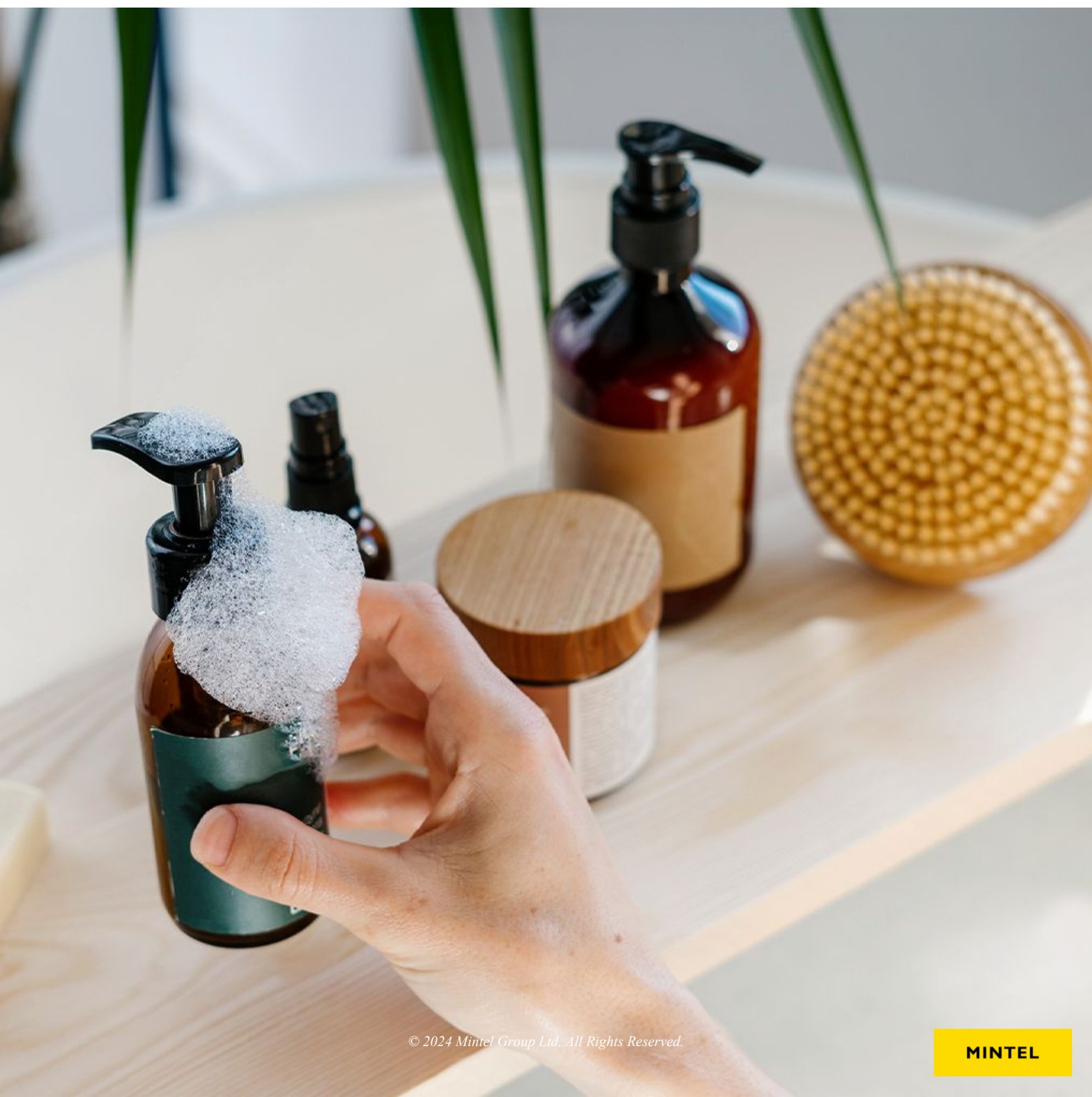


# SOAP, BATH AND SHOWER PRODUCTS – CANADA – 2023

SBS brands have the opportunity to build stronger consumer connections through wellness benefits, a focus on skin health and sustainable innovations.



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Research Analyst - Home  
& Beauty



# Soap, Bath And Shower Products - Canada - 2023

## This report looks at the following areas:

- Soap, bath and shower product usage
- Usage frequency changes since last year
- Important factors considered when making purchase decisions
- Consumer shopping behaviours
- Attitudes related to soap, bath and shower products

## Overview

The 'skinification' of the category is supported by the 87% of consumers who agree that taking care of the skin on their body is just as important as taking care of the skin on their faces. Traditional facial skincare ingredients are increasingly present in SBS products and will help differentiate brands.

Over eight in 10 consumers have noticed an increase in the price of their SBS products in the past 12 months. While the category overall is sheltered from significant cutbacks due to its essential nature, consumers are still looking for ways to economize and find savings. For some, this will mean trading down to lower cost options, while others will reduce their repertoires.

With seven in 10 consumers believing that store brand products work as well as name brand ones, brands are under pressure to distinguish themselves from lower-cost options and prove that they are worthy of consumers' hard-earned dollars. Wellness claims, skincare benefits and novel scents each play a role in differentiating brands. Despite cost concerns, many consumers are willing to invest in small luxuries to treat themselves in trying economic times,



SBS brands have the opportunity to build stronger consumer connections through wellness benefits, a focus on skin health and sustainable innovations.

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and as such, some SBS brands are able to position themselves as a self-care indulgence. This is particularly relevant for the 50% of consumers who believe that it's worth paying more for premium products.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

## CONSUMER INSIGHTS

### Consumer fast facts

#### Soap, bath and shower products used

- Virtually all Canadian consumers participate in the category
  - Graph 1: soap, bath and shower products used, 2023
- Hand sanitizer usage has expanded as a result of the pandemic
  - Graph 2: hand sanitizer usage, 2023 vs 2019
- Limited repertoires focus on the basics
  - Graph 3: soap, bath and shower products repertoire size, 2023
- Women are more involved in the category, even for hygiene-focused formats
  - Graph 4: soap, bath and shower products used, men vs women, 2023
- Younger consumers have expanded repertoires
  - Graph 5: soap, bath and shower products used, by age, 2023
- Younger consumers have expanded repertoires
  - Graph 6: soap, bath and shower products repertoire size, by age, 2023

#### Usage frequency

- Hand sanitizer usage frequency corresponds to lessening illness concerns
  - Graph 7: usage frequency compared to a year ago, 2023
- Bath product usage is on the rise among men
  - Graph 8: change in bath product usage frequency since last year, men vs women, 2023
- Expand the benefits of bathing to further appeal to men
- Shower and bath routines are more flexible for younger consumers
  - Graph 9: those who have increased their usage frequency since last year, by age, 2023

### Purchase influencers

- Fragrance and sensitivity help drive sales
  - Graph 10: important factors when shopping for soap, bath and shower products, 2023
- Fragrance and sensitivity help drive sales
- Multipurpose claims appeal more strongly to men
  - Graph 11: important factors when shopping for body wash/shower gel (select), men vs women, 2023
  - Graph 12: important factors when shopping for bath products (select), men vs women, 2023
- Sustainability is a stronger purchase influencer among younger consumers
  - Graph 13: those citing sustainability as an important factor when purchasing specific formats, by age, 2023

### Shopping behaviours

- Habit and loyalty play an important role in shopping behaviours
  - Graph 14: soap, bath and shower shopping behaviours, 2023
- Consumers rely on a variety of strategies to save
- Women show more price sensitivity in this category
  - Graph 15: shopping behaviours related to price, men vs women, 2023
- Affordability plays a role in purchase decisions
  - Graph 16: shopping behaviours related to price, by perceived financial situation, 2023
- Younger consumers are more open to experimentation
  - Graph 17: shopping behaviours related to experimentation, by age, 2023
- Asian shoppers show an openness to trying new products
  - Graph 18: shopping behaviours, Asian consumers vs overall, 2023

### Soap, bath and shower product attitudes and behaviours

- Consumers recognize the wellness benefits associated with the category
- Those with larger repertoires recognize benefits beyond hygiene
- Targeting specific mood shifts help differentiate products from standard aromatherapy claims
- Solidify link to wellness with broader supports
- "Everything showers" link larger repertoires and specialized products to self-care
- Multi-benefit products will serve as a counterbalance to maximalist routines
- Traditional facial skincare ingredients are increasingly being added to body products
- Interest extends beyond the face and neck as consumers invest in body skin benefits
- Unisex products appeal to a range of consumers
- Genderless self-care for all
- Sensitivity towards overall value is increasing
  - Graph 19: soap, bath and shower attitudes and behaviours (select), 2023 vs 2019

## COMPETITIVE STRATEGIES

### Launch activity and innovation

- Linking soap, bath and shower products to mental wellbeing reinforces existing consumer behaviours
- Energy levels can be dialed up or down with SBS products
- Beautifying showerheads expand on typical category claims
- Bringing the spa experience home
- Technology is broadening the possibilities for product formulations

### Marketing and advertising

- Sustainable options can differentiate themselves from the pack
- Addressing consumer skepticism related to greenwashing
- Ethical and environmental claims are intertwined
- Ingredients that fight climate change
- Show consumers there are more efficient alternatives to their more indulgent habits
- Consumers are feeling the pinch, but are willing to treat themselves when they recognize value
- Private label brands appeal on price and claims
- Promoting value through versatility

## THE MARKET

### Market drivers

- Consumers are reevaluating their spending
  - Graph 20: Consumer Price Index, 2020-23
- Inflation continues to cause concern
- Illness concerns motivate increased hand sanitizer uptake
  - Graph 21: hand sanitizer usage, by level of concern about COVID-19, 2023
- Brands should be mindful of immigration patterns and diverse populations
  - Graph 22: top birthplaces of recent Canadian immigrants, 2021
- The needs and preferences of an aging population are shifting
  - Graph 23: population aged 0-14 and 65+, 1988-2068\*
- Accessible products will have broad appeal among aging shoppers

## APPENDIX

- Market definition
- Consumer research methodology
- Consumer qualitative research

- Generations
- Abbreviations and terms

### Disclaimer

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