

Aqualisa Quartz

simply a better shower



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Background

Aqualisa innovate a breakthrough product (Quartz) to the market but it was unsuccessful in the market because of *Plumber's Electronic Syndrome*.



INDUSTRIAL OVERVIEW



AQUALISA

**Sensational
Showers**

Renowned for performance and reliability

The U.K. Shower Market



Electric Showers

- heating elements instantaneously heated the water to the required temperature, eliminating the need for a boiler to store hot water.
- convenient for small bathrooms, the electrical components were usually mounted in a bulky white box that was visible in the shower stall.
- did nothing to address the poor water flow of many showers in U.K. homes,
- sold mostly under a separate brand name, the 'Gainsborough' brand.

- Valves came in two types :
 - thermostatic ☞ controlled temperature automatically
 - manual ☞ manually find the right temperature
- Installing a mixer valve meant excavating the bathroom wall.
- Add booster pump to boost water pressure (cost € 350 to € 600)
- Core Product: Aquavalve609 (thermostatic); Cost : € 155 Price : € 675 to € 750;
- Sales: 60,000 units per year; Image : high-quality and reliable





Concealed
adjustable height
head - gold

Mixer Shower Valves



Exposed adjustable
height head - white
and chrome

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Integral Power Showers

Pricing Segment

Premium Segment Consumer :

- shopped in showrooms
- Granted high performance and service
- Style determined selection

Standard price Segment :

- emphasize performance and service
- Product selection rely on plumber

Value Segment :

- concern with convenience and price
- Avoid solutions that required any excavation
- Product selection rely on plumber
- Concerned with convenience and price

Do-it-yourselfers Segment :

- shopped at large retail outlets
- Interested in inexpensive models that were easy to install, even though bulky and unattractive
- Overwhelming choice : Electric showers
- Popular among landlords & apartment dwellers

Type of Shower		Aqualisa's Core Product Offerings		
		Value	Standard	Premium
Electric Shower	<ul style="list-style-type: none"> Does not require hot water supply Results in bulky box on the wall Low flow rate 	Gainsborough Retail: €95	Gainsborough Retail: €155	Aquastyle Retail: €230
Mixer Shower	<ul style="list-style-type: none"> Requires both hot and cold water supply Requires additional pump to address pressure problems Installation typically requires excavation of bathroom 	Aquavalve Retail: €390	Aquavalve 609 Retail: €715	
Power Shower	<ul style="list-style-type: none"> Requires both hot and cold water supply Results in bulky box on the wall Regarded as less reliable than a mixer-shower and pump combination 	Aquastream Manual Retail: €480	Aquastream Thermostatic Retail: €670	

Source: Aqualisa.

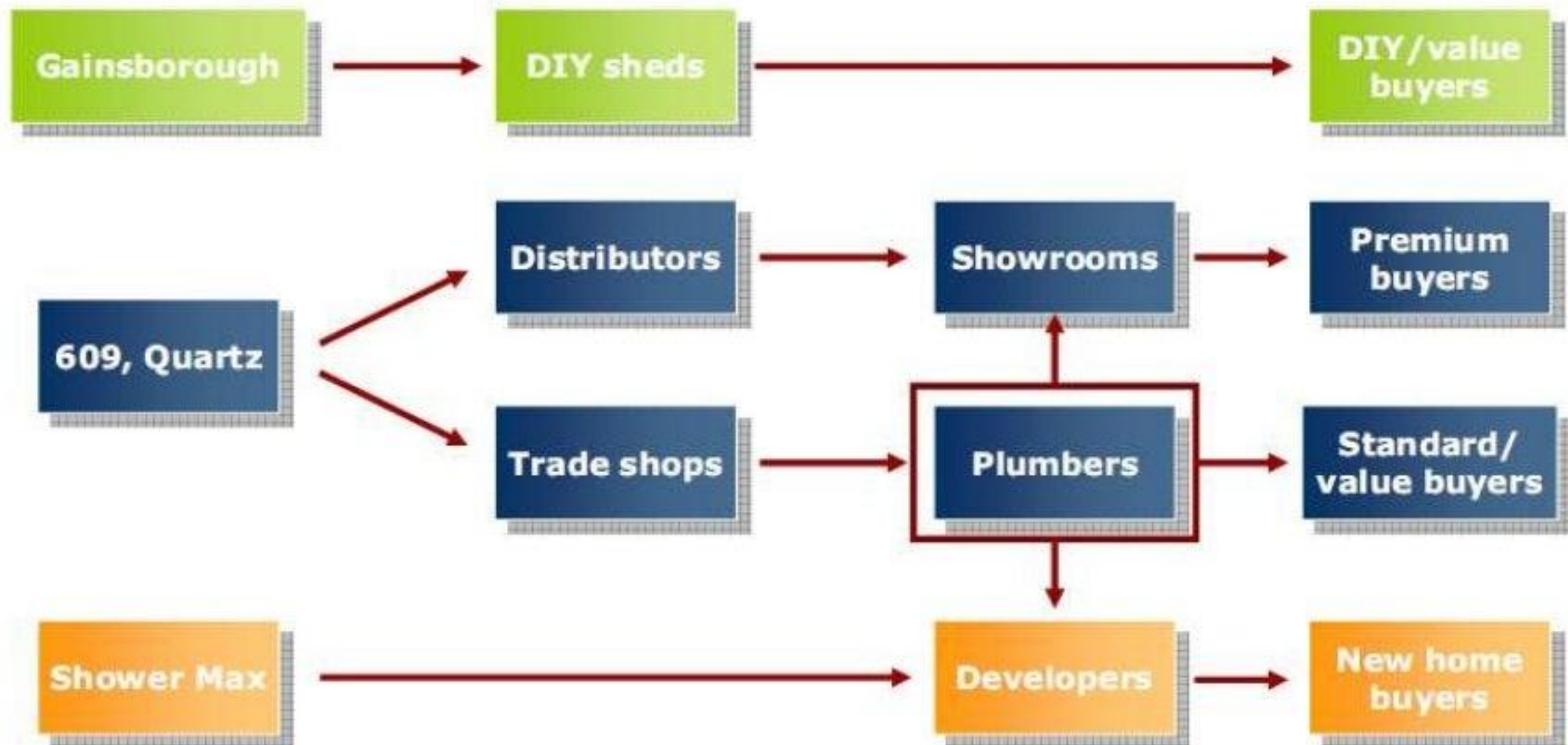


Chart Title

■ Triton ■ Mira ■ Gainsborough ■ Aqualisa
■ Masco ■ Ideal Standard ■ Heatrae Sadia ■ Bristan
■ Grohe ■ Hansgrohe ■ Others

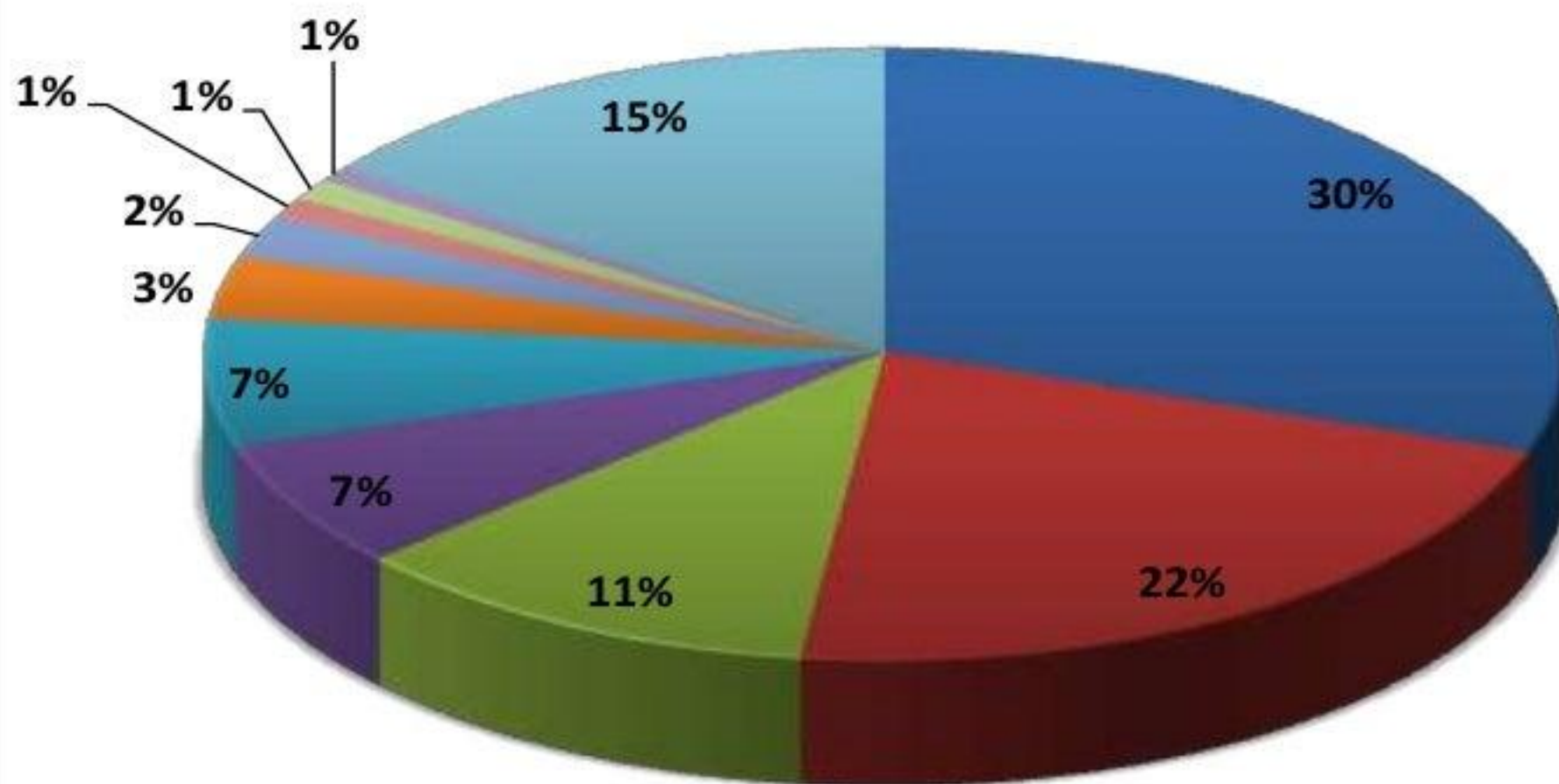
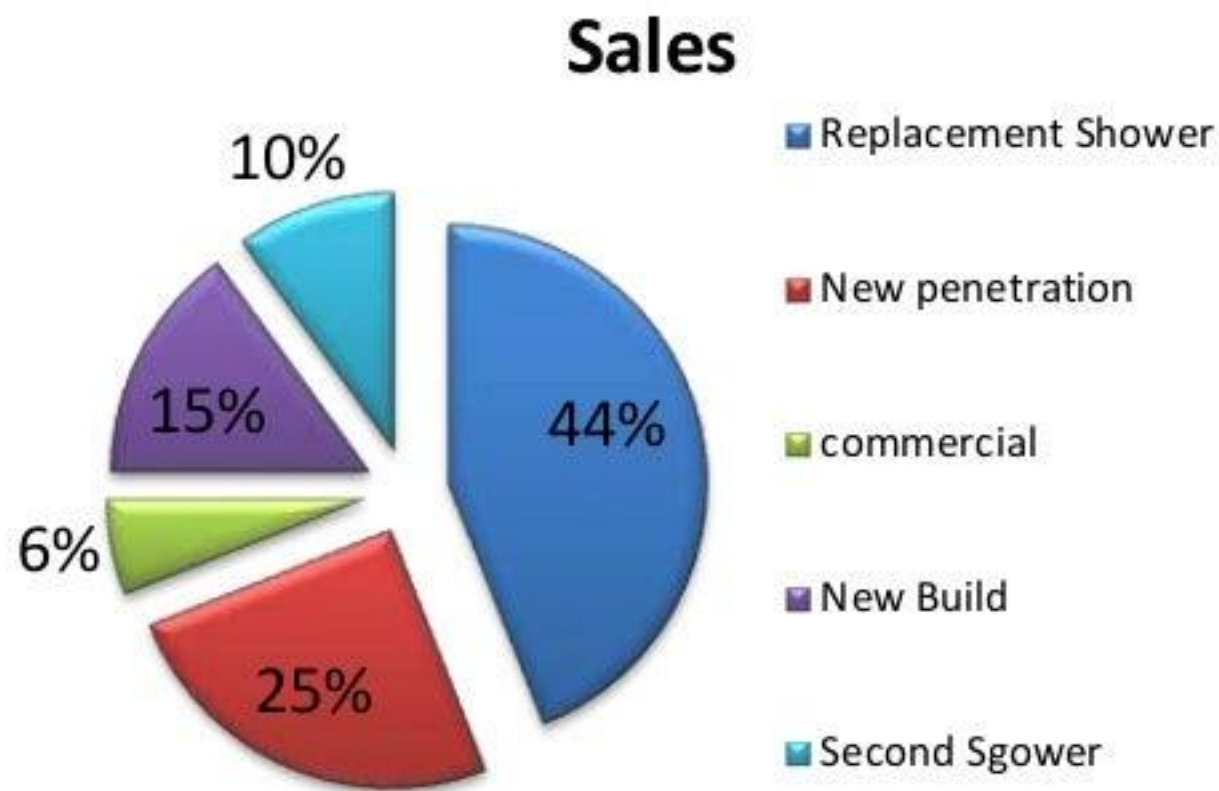


Exhibit 6 U.K. Shower Market, by Product Type and Channel (Total Units Sold, 2000)

	Electric Showers	Mixer Showers	Power Showers
Do-It-Yourself Sheds	550,000	80,000	20,000
Showrooms	55,000	70,000	20,000
Trade Shops	330,000	400,000	110,000
Other (Electrical wholesalers)	165,000		
Total Units Sold	1,100,000	550,000	150,000

Source: Aqualisa.

U.K. Shower Sales by Reason for Installation



→ The principle reason for consumer to install a shower is to replace the old shower into new ones (44% of customers).

→ There are only 6% of consumer who has a *commercial* purpose in installing a shower.

A white shower curtain hangs from a horizontal metal rod. The curtain is made of a translucent material and is held up by four metal rings. The background is a wall of white square tiles with dark grey grout. The text "The Quartz Shower Valve" is centered over the lower half of the image.

The Quartz Shower Valve

The are 2 versions:

- The Quartz Standard Shower
- The Quartz Pumped Shower

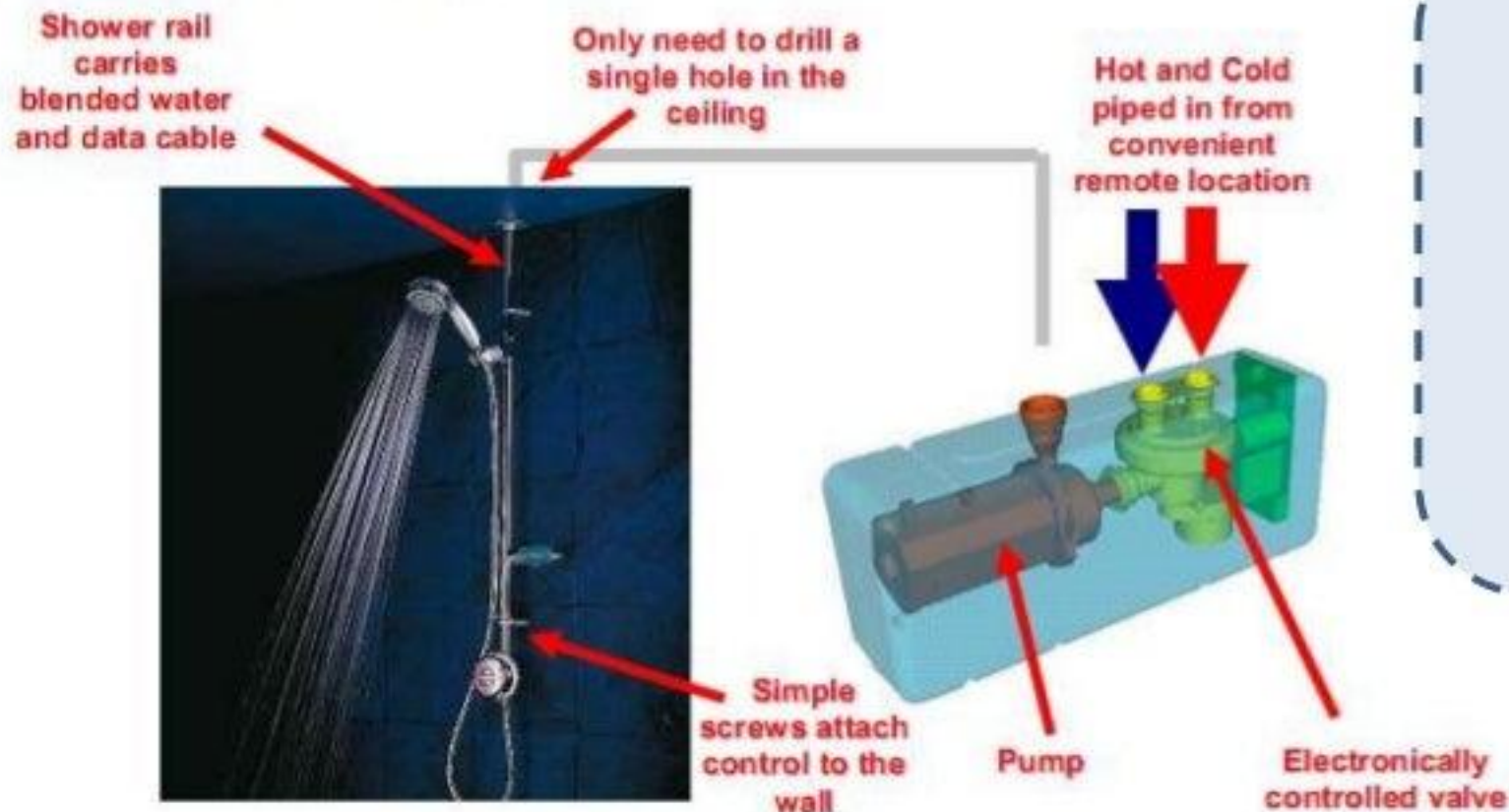
To install the Quartz shower:

- the plumber had to identify a physical space to accommodate the remote processor
- The processor contained the thermostatic mixing valve and pump
- The device could be mounted horizontally, vertically, or on its side, depending on space constraints

With Quartz technology:

- Installation time of a half-day
- Plumbers were finding that the install was so straightforward
- The Quartz shower provided efficient and reliable water pressure and temperature – “one touch” control
- the temperature control is automatic

Figure B The Quartz Technology





Quartz Value Proposition

	VALUE
PLUMBERS	Easy to install
	More profitable – able to do more installation
	Take 0.5 day to install which is only 25% of previous times
	Even apprentice can do the installation
CONSUMERS	Efficient and reliable water pressure and temperature
	Safe to use for kids and elder people
	One touch control with red light indicator
	Much easier to install for DIY sector
	Excellent design and aesthetics, which increases ownership pride

		Individual	Developers	Plumbers
C O S T	Premium &Standard	Diyers	Price Sensitive	Don't like innovation
	Low brand awareness	Change premium brand preception	Small market	Costly to convert
B E N E F I T	Independent of plumber influence	Large market	Influence plumber	Largest market share
	Premium brand recognition	Cheaper		Strong influence to customer

PROBLEM

- **HIGH INNOVATION & TECHNOLOGY but LOW IN SALES**
- Rawlinson should choose appropriate marketing strategy to overcome the problem. The choice are :
 - Targeting customer directly
 - Targeting developers
 - Targeting DIY

