

# CLEANING IN AND AROUND THE HOME – GERMANY – 2023

Getting cleaning tasks done as quickly as possible is highly important to consumers. Brands that offer easy-to-use products and tap into technology (eg AI, robots) will win favour.



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# Cleaning In And Around The Home - Germany - 2023

## This report looks at the following areas:

- How much time consumers spend cleaning inside the home and tending outside the home
- Consumers' enjoyment of cleaning, and how skilled consumers feel they are
- Typical frequency of different types of cleaning task in the home
- Priorities when consumers clean their home
- Behaviours around cleaning

## Overview

Despite the fact that **82% of German consumers** have an outdoor space in their home, such as a balcony or garden, 23% of them do not spend any time tending outside the home.

**While the needs-driven nature of home cleaning provides some resilience to a drop in consumer demand, household care brands are not immune against trading down.** CPI for household care products exceeded **high inflation levels in 2022** and **34% of German household care shoppers bought more own-label products in the 12 months to June 2023.**

At **47%**, tidying around the house is the task that consumers do most frequently every day (vs 27% for wiping surfaces). While household care products are not directly involved, **brands can engage with consumers during the task.** As **74% of consumers who spend time cleaning their home** listen to something while cleaning, brands can connect with them through music by, for instance, creating Spotify cleaning playlists.



Getting cleaning tasks done as quickly as possible is highly important to consumers. Brands that offer easy-to-use products and tap into technology (eg AI, robots) will win favour.

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To cater to the **89% of consumers with cleaning responsibilities** who think getting tasks done as quickly as possible is important, brands can push tech-assisted cleaning solutions (eg AI, robots) and promote easy-to-use products more strongly. This likely also alleviates stress for those with low cleaning skills that consider cleaning strenuous.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview

### Market context

- Inflation and rising household care product prices put pressure on consumers
- The cost-of-living crisis affects financially healthy dual-parent families

### Opportunities

- Invest in easy-to-use products and automation to take the load off of consumers
- Leverage AI to create more-efficient work distribution
- Offer new ways to use scents

## MARKET DRIVERS

### The German economy

- Stagnation follows a technical recession
  - Graph 1: key economic data, in real terms, 2019-24
- Inflation slows down – but remains at a higher level
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and consumer expenditure
  - Graph 2: financial confidence index, 2022 - 23
- The impact of the economy on the household care market

### Demographics

- Single households belong to the lowest income group
  - Graph 3: people living alone, by age and gender, 2022
- Healthy finances do not protect parents from trading down
- Gen Z will take on more household care responsibilities in the future

### Redefinition of the home

- The home as a space for work...
- ...and socialising

### Technology and sustainability in household care

- Technological advancements in household care are accelerating

- Water shortages in Germany

## WHAT CONSUMERS WANT AND WHY

### Amount of time spent cleaning in and around the home

- The majority of consumers spends up to four hours cleaning their homes
  - Graph 4: time spent cleaning the home, 2023
  - Graph 5: time spent tending outside the home, 2023
- Consumers are embracing a relaxed stance towards cleaning
- Time-saving products will appeal to time-strained single households
- Assure germ removal for those who are still worried about COVID-19
- Give parents room to breathe with AI tools creating a cleaning schedule
- Offer versatile products for in and around the home
- Create quality time for families with educational content for tending the garden

### Level of enjoyment of cleaning

- Over one in three consumers who spend time cleaning their home do not enjoy cleaning
- Highlight convenience in a product's ability to save time and energy
- Enable consumers to relax when cleaning

### Rating of cleaning skills

- Confidence in cleaning skills is high
- More than half of consumers feel confident in their cleaning skills
- Help parents share their cleaning skills and enjoyment with their children
- Help Gen Zs gain confidence with convenient products and cleaning tips

### Frequency of household care activities

- Tidying, wiping surfaces and vacuuming are the most frequent cleaning tasks done in a week
  - Graph 6: frequency of cleaning tasks, 2023
- Highlight surface cleaners' ability to remove bacteria while still smelling nice
- Find new ways for scent to be distributed in the home
- Pre-portioned floor cleaning sheets and tabs help optimise parents' cleaning routines

### Priorities when cleaning the home

- Making the home look tidy is the most important
- Collaborate with storage solution brands to extend reach into tidying the home
- Enable faster cleaning with easy-to-use products and automation compatibility
- Examples of easy-to-use household care products

## **Behaviours towards cleaning in and around the home**

- Listening to something while cleaning likely leads to a more enjoyable experience
- Connect with consumers through music
- Highlight eco-friendly products' ability to clean without harsh ingredients
- Alleviate Gen Z's strain when cleaning with task distribution apps
- Review hacks on TikTok to guide Gen Z

## **APPENDIX**

### **Appendix – products covered, abbreviations, consumer research methodology and language usage**

- Definitions used in this Report
- Abbreviations
- Consumer research methodology
- A note on language

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