

CLEANING THE HOUSE – US – 2024

While cleaning habits have changed little in the past two years, consumers' growing curiosity about the category will serve as an opportunity for growth.



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Cleaning The House - US - 2024

This report looks at the following areas:

- Shifts in shopping and cleaning behavior and frequency
- Attitudes toward cleaning and emerging expectations of brands
- Resources used to find cleaning information
- Associations with specific formats
- Trends in launch activity for household products and opportunities for further innovation



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Overview

This Report examines consumers' cleaning behaviors and approach to shopping in the household care category. Macroeconomic pressures continue to cause some shoppers to make concessions to reduce category spend. However, the majority remain committed to cleaning and caring for their home.

A trickle effect from the pandemic, there is a new level of engagement in the category that is spurring consumers to become more invested in the products they use.

A little education can go a long way, especially when looking to expand audience reach and capture the attention of Gen Z and Millennials. These groups demonstrate a strong penchant for learning more about the products they use, seeking information and paying attention to claims and ingredients more so than older generations.

This interest in ingredients is closely connected to their quest to understand effectiveness of household products, reinforcing the importance of transparency in the category. In addition to

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the intrinsic relationship between ingredients and performance, consumers are more inquisitive about the ethical and sustainable origin of ingredients, leading to new sustainability indicators (eg traceability) gaining consumer attention. Clearly communicating enhancements to the consumer while keeping efficacy and convenience at the core of new product development will be crucial.

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Report Content

Key issues covered in this Report

- Overview

EXECUTIVE SUMMARY

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

CONSUMER INSIGHTS

Consumer fast facts

Cleaning frequency

- Cleaning habits remain consistent
- Cleaning habits remain consistent
 - Graph 1: cleaning frequency – trended, 2020-24
- Guide Gen Z as they start the cleaning journey
- Guide Gen Z as they start the cleaning journey

Changes in shopping and cleaning behavior

- Feed consumers' thirst for more information
- Feed consumers' thirst for more information
 - Graph 2: change in cleaning and shopping behaviors, 2024
- Clear the confusion
- Lack of understanding underpins need for transparency
 - Graph 3: greater focus on ingredients and claims, by select shopping behaviors, 2024
- Young shoppers invest time in learning
 - Graph 4: changes in select attitudes and behaviors, 2024
- Consumers rarely try something new
 - Graph 5: select purchase behaviors, by age and income, 2024

Attitudes and behaviors toward cleaning

- Cleaners are active and confident
 - Graph 6: attitudes and behaviors toward cleaning – any agree (net), 2024

- The importance of enabling through education is evident
 - Graph 7: select attitudes toward cleaning, by cleaning confidence, 2024
- Look to beauty brands that take us behind the scenes with science
- Satisfy the next generation's craving for science
 - Graph 8: select attitudes toward cleaning products, by age, 2024

Sources of cleaning information

- Research happens at consumers' fingertips
- Research happens at consumers' fingertips
 - Graph 9: sources of cleaning information, 2024
- Focus on social media presence to reach a younger audience
- Focus on social media presence to reach a younger audience
- Social media plays a role in learning

Attitudes toward homecare product formats

- Adoption of alternative formats hinges on trial

COMPETITIVE STRATEGIES

Launch activity and innovation

- Emerging formats present expansion opportunity
- Premium should consider expanding into value
- Blueland bets on brick-and-mortar

Marketing and advertising

- Social media plays a role in learning, and potentially future sales

Opportunities

- Empower and entertain with the rise of augmented cleaning
- Alternative disinfection on the horizon
- Science will bring trust in 'clean' cleaning
- The slow movement is the next step in sustainable homecare

THE MARKET

Market context

- Market context

Market audience

- Equality within the home continues to backslide
 - Graph 10: shopping responsibility – trended, 2022-24

- Graph 11: cleaning responsibility – trended, 2020-24
- Embracing equity: brands striving for a more gender-equal world
- Employers need to include homelife inequality in DEI initiatives

Market drivers

- Inflation eases yet shrinkflation and cost of essentials remains high
 - Graph 12: Consumer Price Index change from previous period, 2021-23
- Consumers have money to spend
 - Graph 13: Disposable Personal Income change from previous period, 2013-23
- 2023 bill could keep consumers in the dark about chemicals

APPENDIX

- Market definition
- Consumer research methodology
- Correspondence analysis methodology
- Generations
- Abbreviations and terms

Disclaimer

This is marketing intelligence published by Mintel.
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