

# HOUSEHOLD CLEANING EQUIPMENT – CANADA – 2024

Canadians are looking for ways to streamline their cleaning routines with convenient tools that offer versatility, sustainability and value.



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# Household Cleaning Equipment - Canada - 2024

## This report looks at the following areas:

- Market factors influencing the cleaning equipment market
- Cleaning equipment shopping responsibilities
- Cleaning tools and floor cleaning equipment ownership and usage
- Future interest in floor cleaning equipment purchases
- Influential purchase factors when purchasing cleaning equipment
- Household cleaning equipment attitudes and behaviours



Canadians are looking for ways to streamline their cleaning routines with convenient tools that offer versatility, sustainability and value.

## Overview

The rising cost of living has made consumers more cautious about purchasing decisions. This economic pressure can lead consumers to delay updates to their cleaning arsenal or seek more budget-friendly alternatives, including private label goods or extending the use life of current tools. Despite these challenges, the intrinsic necessity of maintaining a clean household environment ensures continued demand of equipment and tools.

There is an opportunity to combat spending hesitancy by promoting equipment upgrades as sustainable alternatives. By emphasizing the long-term environmental and cost benefits of these products, brands can appeal to the growing consumer base that values both eco-friendliness and economic savviness.

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Long purchase cycles threaten short-term growth, particularly during tricky economic times. Brands can incentivize trade-ups with messaging related to improvements in sustainability, convenience or a well-deserved treat. Positioning related to a longer-term benefit may also motivate consumers to make the switch sooner than planned.

Hygiene worries guide choices towards disposable and easy-to-clean reusable tools. With 61% of consumers concerned about germs on their cleaning equipment, there is a need to assure consumers of the cleanliness of the equipment and offer easy solutions for maintaining equipment.

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## Report Content

### EXECUTIVE SUMMARY

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

### CONSUMER INSIGHTS

#### Consumer fast facts

#### Cleaning equipment shopping responsibilities

- More than half of consumers are solely responsible for cleaning purchases
  - Graph 1: responsibility for buying household cleaning equipment, 2024 vs 2022
- Traditional gender roles continue to impact shopping responsibilities
- Encouraging men's involvement with representation

#### Cleaning product usage

- Consumers are relying on a variety of tools to keep their homes clean
  - Graph 2: cleaning tools used in the past three months, 2024 vs 2022
- Women are more likely to favour tailored cleaning tools...
  - Graph 3: cleaning tools used in the past three months, men vs women, 2024
- ...while men are more likely to seek out generalized ones
- Younger consumers rely more heavily on hand washing tools
  - Graph 4: cleaning tools used in the past three months, by age, 2024
- Elevating the hands-on cleaning experience
- Cultural views can impact tool choice
  - Graph 5: cleaning tools used in the past three months, Asians vs overall, 2024
- Wide price ranges make cleaning tools affordable to all
  - Graph 6: cleaning tools used in the past three months (select), by household income, 2024

#### Floor cleaning equipment usage

- Consumers are slow to adopt expensive, tech-focused tools
  - Graph 7: ownership and usage of floor cleaning equipment, 2024
- Consumers are slow to adopt expensive, tech-focused tools
- Convenient tools are gaining ground, but purchase cycle length limits purchases
  - Graph 8: ownership of floor cleaning equipment, 2024 vs 2022

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- Cost concerns limit growth of robotic tools
- Amazon and iRobot's cancelled merger may benefit consumers
- Younger consumers gravitate towards tech-focused tools, but also rely on tried and true manual formats
  - Graph 9: ownership of vacuum cleaner types, by age, 2024
  - Graph 10: ownership of floor cleaning equipment, by age, 2024
- Cleaning habits are more established among older consumers
  - Graph 11: interest in buying floor cleaning tools within the next six months, among those who do not currently own, by age, 2024

## Household cleaning equipment purchase factors

- Value remains a top priority for consumers
  - Graph 12: household cleaning equipment purchase factors, 2024 vs 2022
- Showcasing value in a variety of ways
- Versatility builds value
- Functional elements are strongly valued among older consumers
  - Graph 13: household cleaning equipment purchase factors, by age, 2024
- Green materials improve sustainability metrics for disposable cleaning tools
- Reusable options are positioned as sustainable and convenient alternatives to disposables
- Keeping cleaning equipment clean

## Attitudes and behaviours: convenience

- Consumers may want to clean more, but they don't think they have the time
- Mopping and vacuuming at the same time
- Using technology for a more thorough (and fun?) clean

## Attitudes and behaviours: ingredients

- Chemical-free cleaning is a 'nice to have' feature
- Health concerns drive interest in chemical-free cleaning among parents
  - Graph 14: those citing ability to be used without cleaning products as an important purchase factor, by child's age, 2024
- The cleaning power of water
- Performance is linked to cleaning tools rather than chemical cleaners

## Attitudes and behaviours: hygiene

- Are your cleaning tools actually clean?
- Younger consumers need hygiene reassurances
- Hygienic cleaning equipment for social status
- Equipment design can enhance perceptions of cleanliness
- Self-cleaning tools offer hygiene and convenience benefits
- Easy to clean equipment
- Health concerns drive a greater interest in equipment hygiene

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- Graph 15: cleaning equipment hygiene attitudes (% agree), by COVID-19 exposure worry, 2024
- Parents have heightened hygiene concerns
  - Graph 16: cleaning equipment hygiene attitudes (% agree), by parental status, 2024
- Reusable equipment is more likely to be considered unhygienic by Asian consumers
  - Graph 17: cleaning equipment hygiene attitudes (% agree), Asians vs overall, 2024
- The convenience and cleanliness of disposables is favoured among large households
  - Graph 18: disposable cleaning equipment attitudes (% agree), by household size, 2024

## Attitudes and behaviours: sustainability

- Consumers are seeking greener cleaning solutions
- Interest in eco-friendly, reusable cleaning solutions reflects a conscious shift towards greener practices
- Position equipment upgrades as a sustainable alternative
- Reducing waste as a cost saving measure
- Eco-friendly tools are a higher priority for younger consumers
  - Graph 19: cleaning equipment sustainability attitudes (% agree), by age, 2024
- Cultural background impacts views towards sustainability
  - Graph 20: cleaning equipment sustainability attitudes (% agree), by racial background, 2024
- Parents are looking for more sustainable equipment
  - Graph 21: cleaning equipment sustainability attitudes (% agree), by parental status, 2024

## COMPETITIVE STRATEGIES

### Launch activity and innovation

- Consumers will be looking for pet-focused cleaning solutions
  - Graph 22: pet ownership by type of pet, 2023
- Consumers will be looking for pet-focused cleaning solutions
- iRobot T.R.E.A.T incorporates pets into cleaning routines
- Freeing up time with convenient tools
- Families are looking for time-saving solutions
  - Graph 23: 'Cleaning the floors in my home takes too much time', by parental status, 2024
- Using technology to streamline and optimize cleaning tasks
- Robotic vacuums clean surfaces beyond flooring
- Window cleaning robots venture indoors

### Marketing and advertising

- Tackling long purchase cycles with upgrades
- Offering a trade-in rebate to improve affordability
- "Before-and-after" demonstrations emphasize a tool's cleaning performance
- Making the connection between cleaning and mental health

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- Equating cleaning with self-care
- Scent-focused products can tie into mental wellness
- Cleaning for comfort, not just to avoid illness

## THE MARKET

### Market drivers

- Inflation cools, but affordability remains an issue
  - Graph 24: Consumer Price Index, 2020-24
- Inflation cools, but affordability remains an issue
- The return to the office takes time away from cleaning tasks
  - Graph 25: percentage of workforce anticipated to work on-site or remotely over the next three months, first quarter of 2024
- The aging population will require specific cleaning solutions
  - Graph 26: population aged 0-14 and 65+ , 1988-2068\*
- Cleaning tool accessibility
- Homeownership rates are declining
  - Graph 27: 1971-2021

## APPENDIX

- Consumer research methodology
- Consumer qualitative research
- Generations
- Abbreviations and terms

### Disclaimer

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