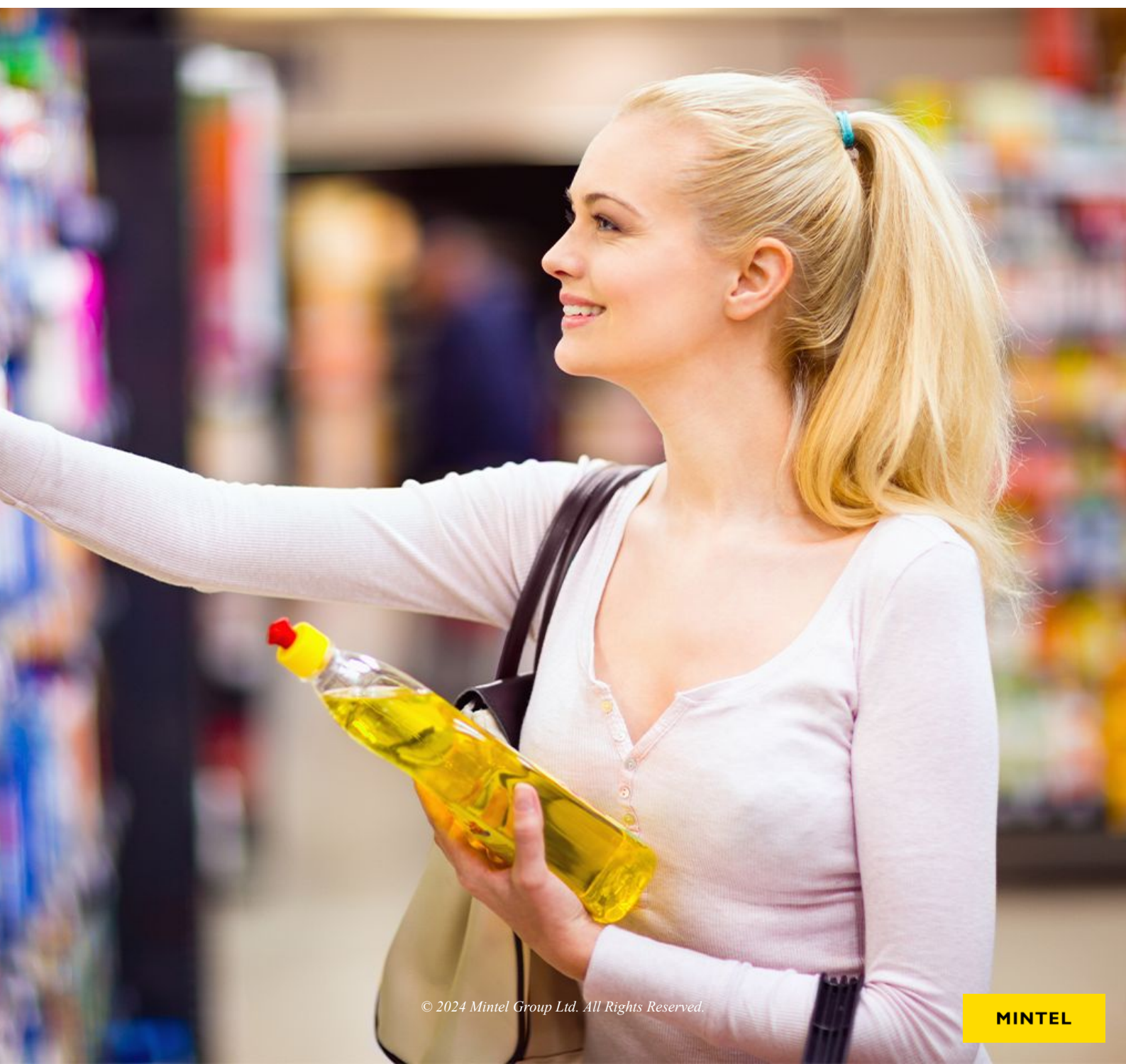


# SHOPPING FOR HOUSEHOLD CARE PRODUCTS – GERMANY – 2023

Household care brands have a chance to help close the gender household care gap by promoting shared household shopping responsibilities at an early stage in consumers' life.



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# Shopping For Household Care Products - Germany - 2023

## This report looks at the following areas:

- Responsibilities for shopping for household care products within a household
- Which types of retailers and channels consumers use to shop for household care products
- The proportion of products that are bought alongside groceries, and the proportion that are bought separately
- How consumers would prefer brands to respond to rising costs
- Changes in consumers' shopping behaviour amid the cost-of-living crisis
- Attitudes towards shopping for household care products, including the balance between price and quality



Household care brands have a chance to help close the gender household care gap by promoting shared household shopping responsibilities at an early stage in consumers' life.

## Overview

At 80%, female German consumers are most likely to be solely responsible for buying household care products (vs 58% of men), reflecting gender inequalities in household care.

**While household care products are essential to consumers' cleaning routines, they are not immune against trading down. CPI across household care categories exceeded high**

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**inflation levels in 2022** and squeezed budgets affected how consumers engage with the category.

In fact, **34% of German household care shoppers bought more own-label products, threatening brands**. Also, **69% of household care shoppers** agree that brands use inflation as an excuse to raise prices. To compete with own label, brands can focus on their legacy products, **underscoring the trust established throughout the years**. Also, brands can respond by being more transparent about the composition of their prices.

To break the gender household care gap, brands should engage with Gen Z now as they will assume greater household shopping responsibilities in the future. They can highlight how household duties are a job that is done together to increase the number of women who share responsibilities. Brands can turn social media savvy younger men into influencers themselves and encourage them to show off their own efforts via social media hashtags.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview

### Market context

- Price increases for household care products exceed inflation
- Gen Z as the shoppers of tomorrow

### Opportunities

- Close the gender household care gap
- Offer smart solutions around price
- Explore online opportunities to boost engagement among parents and Gen Z

## MARKET DRIVERS

### The German economy

- Stagnation follows a technical recession
  - Graph 1: key economic data, in real terms, 2019-24
- Continuously high inflation shapes consumers, brands and the economy...
- ...impacting financial wellbeing...
- ...confidence and consumer expenditure
- The impact of the economy on the household care market
- High prices in household care put a strain on consumers' budgets

### Gender disparity

- Equality hasn't reached all areas of life yet

### Gen Z transitions into adulthood

- Gen Z's living situation

### Greenhouse gases

- The need to reduce greenhouse gas

## WHAT CONSUMERS WANT AND WHY

### Purchase responsibility

- Women still bear the brunt of the work

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- The gender household care gap narrows with decreasing age...
- ... and gives brands the opportunity to focus on younger men to push equality longer-term
- Push for shared responsibilities
- Ariel India fights the gender household care gap

## Channels for purchase of household care products

- Brick-and-mortar more popular than online stores
  - Graph 2: retailers to shop for household products, by gender, 2023
- Drugstores most popular among brick-and-mortar stores
- Female and male household care shoppers exhibit different preferences for retailers to shop at
- Use the drugstore-space to launch exclusive household care products in collaboration with influencers
- Give flexible subscription options to Gen Z users
- Discounters find particular appeal during the cost-of-living crisis
- Highlight efficacy to raise confidence in own-label products

## When people shop for household care products

- Buying household care products often combined with grocery runs
- Buying household care products alongside groceries limits brand access
- Collaborate with local businesses to save time for shoppers

## Preferred brand response to rising costs

- Brands will have to appease consumers with a mixed-solution approach
- Balance out consumers' wants and rising ingredient costs
- Turn consumers into influencers
- Cutting back on product ranges is only a short-term option
- Focus on legacy products in the short term...
- ... and involve consumers in the creation of new product ranges in the long term
- Highlight the cost benefit of concentrates

## Change in household care purchasing behaviours

- Many consumers switched to own label over the past year
- Increased use of own label accelerated by the cost-of-living crisis
- Offer subscription services to busy parents

## Attitudes towards shopping for household care products

- Price increases seem unjustified to consumers
  - Graph 3: attitudes towards shopping for household care products, 2023
- Offer transparency by showing a breakdown of prices
- Room to push loyalty apps among men
- Combine men's interest in live sports to lead them to loyalty apps

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- Rossmann addresses gender stereotypes
- Use online education to showcase eco-friendly products' ability to save money
- Household care products' necessity creates indifference about the shopping experience
- Use gamification to make household care product purchases more fun
- Gen Z's affinity for technology makes rapid delivery services more attractive
- Offer friends-and-family discounts on rapid delivery service apps to tap into trusted recommendations

## APPENDIX

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

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

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