The Future of Household Cleaning: Capitalizing on Emerging Trends and Changing Preferences

Identifying and satisfying what global consumers want from household cleaning products

Report summary

- Covers household care, with a particular focus on household cleaning, including category specific market data and per capita expenditures
- Detailed analysis on consumer attitudes towards, and perceived influence of, different product features and benefits impacting choice
- In-depth action points offering practical strategies based on the trends and insights uncovered in the report
- Covers five major geographic territories: North America, Europe, Asia Pacific, MENA and Latin America

Use this report to develop better targeted products with detailed understanding of the household cleaning needs and preferences of consumers across 17 countries

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About this report

Introduction

Datamonitor believes that a 'marketing sweetspot' exists in the development and wider marketing of household care products. Although consumers are clearly heavily influenced by price, the 'sweetspot' is in recognition of the confluence of consumer trends impacting household care choices.

This report focuses on the household cleaning needs and preferences of consumers across 17 countries. It is less focused on the roles, responsibilities and frequency with which such occasions take place (Datamonitor will cover this in 2010 research). Instead, it analyzes consumers' 'hierarchy of influences', a term that reflects the order of importance that consumers attach to different product benefits/features.

Key findings and highlights

- Two-thirds of consumers globally buy cleaning products on the basis of value-for-money either 'most' or 'all the time'. Brazilians (79 per cent) and Russians (74 per cent) were most fervent in their self-reported quest for value-for-money. Japanese and Swedish consumers expressed the least propensity to buy on the basis of value.
- Environmentalism and the move toward sustainability is becoming a meaningful driver of consumer behavior in household care, but is secondary to most purchase influencers.
- Data extrapolated from Datamonitor's Product Launch Analytics (PLA) database highlights that air fresheners and general purpose cleaners accounted for the highest proportion of new product introductions tracked by Datamonitor's product specialists across the globe in 2008-09.

Reasons to buy

- Develop better targeted products with detailed understanding of the household cleaning needs and preferences of consumers across 17 countries
- Access data analysis from two waves of primary consumer research, and best practice examples of innovative and effectively marketed products
- Improve your marketing by following best-practice guidelines. Develop action plans using Datamonitor's recommendations as a catalyst for ideation

"Industry players should make performance, ease, ethics, wellbeing and value-for-money core components of household cleaning brands"

Daniel Bone, Datamonitor Analyst and Report Author

Sample pages

The Future Decoded

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Product launch trend data offer some insight about the direction of household cleaning products

Trends, because they are heavily aligned with consumer needs, set the preconditions for new products. After all, successful businesses and innovations are rooted in satisfying consumer needs. Changes in consumer needs and behavior must therefore be met by constantly evolving product portfolios.

Developing a winning innovation plays into changing habits, or even unlocks existing needs in completely new and profitable ways. New innovations also shape consumer expectations; once they become familiar with a particular feature or benefit, it becomes ingrained into their habits and similar features are then sought in other products. So industry players shape trend direction through cutting-edge innovation and marketing. Because of this, this section looks at the leading product claims associated with newly introduced household care products.

"We are all futurists, because the future is something we help to create. Every new brand and every new marketing campaign has some effect on the world we live in, to a greater or lesser degree."

Dr Rachel Lawes, Futurology Through Semiotics, Market Research Society, 2009

Data extrapolated from Datamonitor's Product Launch Analytics database presented in Figure 3 below show that air fresheners and general purpose cleaners accounted for the highest proportion of new product introductions tracked by Datamonitor's product specialists across the globe. The following analysis explores these leading categories in detail.

Figure 3: Household care new product launches by region, 2008–09

	Europe	Asia-Pacific	North America	Middle East and Africa	South and Central America	Total
Air Fresheners	1,059	756	522	58	23	2,418
Bleach	25	16	6	4	2	53
Dishwashing Products	220	137	85	16	10	468
Furniture Polish	36	21	20	4	-	81
General Purpose Cleaners	704	449	283	109	33	1,578
Insecticides	198	187	67	21	5	478
Scouring Products	84	73	19	12	6	194
Toilet Care	185	110	18	14	10	337

Source: Datamonitor Product Launch Analytics

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Action Points

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Figure 44: The success of Clorox demonstrates that green cleaning has credibility

Effectively 'going green' to drive growth in the stagnant and stodgy household care market

- Clorox's launch of its Green Works brand marked the company's entry into environment-friendly cleaning and helped to reignite the stagnant household care market with added value products
- Despite accusations of greenwashing, due to Clorox's ownership of a core bleach based product line, Green Works is now the leading green household care brand in the US, accounting for over 40% of the market share
- Clorox's launch of the Green Works range across the US in January 2008 marked a major departure from its bleach based products
  - Featuring biodegradable, nontoxic, plant-based cleansers that are not tested on animals, are non-allergenic and come in recyclable packaging, the launch marked the first time in 20 years that Clorox had introduced a new brand to market
- Clorox says it delayed the launch to market for six months while it perfected the formula, to "create products that clean with the power you expect from Clorox", highlighting its focus on cleaning effectiveness
- Clorox has been accused of 'greenwashing' with this brand launch, due to its bleach based main product line and past activities in contravention of environmental laws:
  - In 2007, Clorox received a fine of $95,000 from the Environmental Protection Agency for its mistaken distribution of a product destined for an overseas market
  - Its selling of a version of Clorox disinfectant bleach in the US that was destined for sale in China, contravened regulations regarding correct labeling and was also in violation of the stricter pesticide laws found in the US
- In order to dilute the 'greenwashing' criticisms, before launching its Green Works range in its home market of the US, Clorox sought to work with the influential environmental action group the Sierra Club, successfully gaining its approval in January 2008
- The Sierra Club has commended the company for the relative low cost of the Green Works range
  - The products are priced at US$2.99 – US$3.39 and therefore only around 10% more expensive than their conventional ranges
  - The Sierra Club believes this will help remove the cost barrier, which until now has prevented many American families from buying as many eco-friendly products as they would like:

'The Green Works line will make it easier and more affordable for Americans to buy eco-friendly products' Carl Pope, Executive Director, The Sierra Club

- Green Works is now the number one natural cleaning brand in the US, and has a share of over 40% of the market

Source: Successes and Failures in Consumer Goods Innovation and NPD, BFCM0361

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Table of contents

OVERVIEW

- **Catalyst**
- **Summary**

THE FUTURE DECODED

- **INTRODUCTION: Household care comprises laundry and household cleaning, with this report only focusing on the latter**
  - This report is one of two category-focused reports outlining household care trends and preferences
  - Irrespective of whether consumers like cleaning their houses, it is something that is generally deemed to be highly important

TREND: The most significant growth in household cleaning products is occurring in the emerging markets
  - Product launch trend data offer some insight about the direction of household cleaning products
  - General purpose cleaners generally account for the highest share of consumers' household cleaning spend
  - Air fresheners are well placed to capitalize on the powerful influence of scent on consumers' emotional wellbeing and the fact that people are gravitating towards their homes amid the economic downturn
  - Bleach spend in many markets is falling amid concerns about formulation and the growing efficacy of general purpose cleaners
  - Emerging markets will be the main engine of growth for dishwashing products
  - Key takeouts and implications: emerging markets represent the 'path to growth' in household care

- **INSIGHT: A preoccupation with health and wellbeing also exerts significant influence on household cleaning attitudes, motivations and preferences**
  - Consumers explicitly recognize the link between good hygiene and wellbeing via a 'feel-good factor' that is obtained from doing the cleaning and/or the results obtained
  - Consumers are less able to relate to the idea that the act of household cleaning itself is therapeutic
  - Most consumers are aware of and concerned about the negative health effects of poor home hygiene
  - Fears over ingredient harshness and safety in household care products are influencing consumer choices, with the halo surrounding natural formulations becoming more apparent
  - Sensory benefits can also boost the wellbeing factor of household care products
  - Key takeouts and implications: the industry must strive towards better associating household cleaning products with wellness

- **INSIGHT: Value for money considerations heavily influence household product choice and the generally favorable perception of private label branded cleaning products**
  - Value-consciousness is a highly pervasive influence of many household care product choices
  - Private label household cleaning products have increasing credibility with consumers, but the habitual buying of preferred brands is still relatively commonplace
  - Word-of-mouth recommendations and product samples are also perceived to exert some influence on product choice
  - Key takeouts and implications: be wary of putting a disproportionate focus on price in responding to consumers' value-consciousness

- **INSIGHT: Convenience and efficacy heavily influence household cleaning choices due to both an inherent dislike of cleaning and perceived time scarcity**
  - The majority of consumers both dislike household chores and feel constrained by time scarcity
  - Efficacy and multi-purpose benefits are deemed influential to consumers, but less so than other benefits
  - Minimizing time spent doing housework is important to consumers, but is not fully reflected in the perceived influence of time-saving product features
  - Consumers attach more importance to ease of use than ease of storage, but both are highly influential attributes shaping household care preferences
  - Key takeouts and implications: consumers are looking for ways to minimize time and effort spent on doing their housework, and household care brands must outperform rivals in this critical area

- **INSIGHT: Ethicality and sustainability is a theme that continues to gain momentum in household care product choices**
  - A notable segment of consumers are deliberately avoiding companies and brands with a poor environmental reputation and are also paying attention to sustainable packaging issues
  - Ethical and environmental consumerism drives the demand for more 'virtuous formulation' and 'virtuous production'
  - Key takeouts and implications: environmentalism and the move toward sustainability is becoming a meaningful driver of consumer behavior in household care, but is secondary to most purchase influencers

ACTION POINTS

- **ACTION: Make performance, ease, ethics, wellbeing and value for money core components of household cleaning brands**
- **ACTION: Help consumers to understand what ingredients are used and why**
- **ACTION: Cater to consumers' desires for more ethical, safer products and processes**
- **ACTION: Offer higher-value, more effective and more convenient solutions to help protect against the pervasive private label threat**

Table of contents (continued)

APPENDIX

- **Supplementary data**
  - Scouring products
  - Insecticides
  - Furniture polish
- **Methodology**
- **Further reading and references**
- **Ask the analyst**
- **Datamonitor consulting**
- **Disclaimer**

LIST OF TABLES

Table 1: Consumer survey: agreement that consumers are houseproud, in 15 countries across Asia Pacific, Europe, Latin America and North America, by country, 2008
Table 2: Consumer survey: importance attributed to maintaining a clean and hygienic living environment, in 15 countries across Asia Pacific, Europe, Latin America and North America, by country, 2008
Table 3: General purpose cleaners market value and expenditure per capita, in 17 countries across Asia Pacific, Europe, Latin America, MENA and North America, by country, 2003-13
Table 4: General purpose cleaners market across Asia Pacific, Europe, Latin America, MENA and North America, by region and sub-category, 2008
Table 5: Toilet care market value and expenditure per capita, in 17 countries across Asia Pacific, Europe, Latin America, MENA and North America, by country, 2003-13
Table 6: Toilet care market value across Asia Pacific, Europe, Latin America, MENA and North America, by region and sub-category, 2008
Table 7: Air fresheners market value and expenditure per capita, in 17 countries across Asia Pacific, Europe, Latin America, MENA and North America, by country, 2003-13
Table 8: Air fresheners market value across Asia Pacific, Europe, Latin America, MENA and North America, by region and sub-category, 2008
Table 9: Bleach market value and expenditure per capita, in 17 countries across Asia Pacific, Europe, Latin America, MENA and North America, by country, 2003-13
Table 10: Bleach market value across Asia Pacific, Europe, Latin America, MENA and North America, by region and sub-category, 2008
Table 11: Dishwashing products market value and expenditure per capita, in 17 countries across Asia Pacific, Europe, Latin America, MENA and North America, by country, 2003-13
Table 12: Dishwashing products market value, across Asia Pacific, Europe, Latin America, MENA and North America, by region and sub-category, 2008
Table 13: Consumer survey: agreement that having a clean home creates a sense of wellbeing, in 15 countries across Asia Pacific, Europe, Latin America and North America, by country, 2008
Table 14: Consumer survey: the extent to which a calm and relaxed feeling achieved once the home has been cleaned influences the motivation for cleaning, in 15 countries across Asia Pacific, Europe, Latin America and North America, by country, 2008
Table 15: Consumer survey: agreement that cleaning the home is therapeutic, in 15 countries across Asia Pacific, Europe, Latin America and North America, by country, 2008
Table 16: Consumer survey: the extent to which therapeutic benefits of cleaning influence consumers' motivation for cleaning their home, in 15 countries across Asia Pacific, Europe, Latin America and North America, by country, 2008
Table 17: Consumer survey: agreement that regular household cleaning helps reduce the chances of getting illnesses, in 15 countries across Asia Pacific, Europe, Latin America and North America, by country, 2008
Table 18: Consumer survey: expressed concern about the air quality in their home, in 15 countries across Asia Pacific, Europe, Latin America and North America, by country, 2008
Table 19: Consumer survey: stated concern about the safety or harshness of chemicals used in household cleaning agents, in 15 countries across Asia Pacific, Europe, Latin America and North America, by country, 2008
Table 20: Consumer survey: perceptions regarding the credibility of claims that natural cleaning products are just as effective as standard products, in 15 countries across Asia Pacific, Europe, Latin America and North America, by country, 2008
Table 21: Consumer survey: the influence of natural ingredients on consumers' household cleaning and laundry product choices, in 17 countries across Asia Pacific, Europe, Latin America, MENA and North America, by country, 2009
Table 22: Consumer survey: propensity to choose cleaning or laundry products with natural/organic ingredients, in 17 countries across Asia Pacific, Europe, Latin America, MENA and North America, by country, 2009
Table 23: Consumer survey: influence of scent or fragrance on household cleaning and laundry product choices, in 15 countries across Asia Pacific, Europe, Latin America and North America, by country, 2008
Table 24: Consumer survey: influence of scent or fragrance on household cleaning and laundry product choices, in 17 countries across Asia Pacific, Europe, Latin America, MENA and North America, by country, 2009
Table 25: Consumer survey: the propensity to buy cleaning or laundry products on the basis of value-for-money, in 17 countries across Asia Pacific, Europe, Latin America, MENA and North America, by country, 2009

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