

## Toilet Cleaning and Bleach - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



*"While new product launches might help to draw attention to the toilet cleaner segment in the short term, new items alone may not be enough to generate long-term growth. The bigger win for marketers and retailers may lie in helping consumers get more out of the products that already are on the shelf."*

– John Owen, Senior Household Analyst

### In this report we answer the key questions:

- How can specialized toilet cleaners compete more effectively against all the different products consumers use to clean toilets?
- How can bleach continue on a positive course after posting its first sales increase in many years?
- How widespread is concern that bleach is too harsh for regular use? Will competitive ads describing bleach as harsh strike a nerve?

Toilet cleaners and bleach have suffered declining sales over the last several years as budget-conscious consumers have sought to economize on household expenditures. In addition, the category faces competition from a variety of multipurpose cleaning products used for disinfecting and toilet cleaning. A rebound in the bleach segment in 2012, however, broke the downward trend. The reversal points to the potential for focused marketing and new product innovation to increase top-of-mind awareness and reinvigorate sales. To sustain growth over the long run, however, bleach marketers and retailers may need to emphasize more practical advice. A similar approach could also be effective in the toilet cleaners segment, where marketers and retailers have an opportunity to build on the consumer belief that toilets need regular, thorough cleaning.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[oxygen@mintel.com](mailto:oxygen@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Toilet Cleaning and Bleach - US - March 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Scope and Themes

What you need to know  
 Definition  
 Data sources  
 Sales data  
 Consumer survey data  
 Advertising creative  
 Abbreviations and terms  
 Abbreviations  
 Terms

### Executive Summary

#### The market

Figure 1: Total U.S. retail sales and fan chart forecast of toilet cleaners and bleach, at current prices, 2007-17

#### Market factors

Figure 2: Median household income, in inflation-adjusted dollars, 2001-11

#### Market segmentation

Figure 3: Total U.S. retail sales of toilet cleaners and bleach, by segment, at current prices, 2010 and 2012

#### Retail channels

Figure 4: Total U.S. retail sales of toilet cleaners and bleach, by channel, at current prices, 2010 and 2012

#### Leading companies

Figure 5: MULO share of toilet cleaners and bleach, by leading companies, 2012

#### The consumer

##### Modest decline in bleach usage; toilet cleaners hold steady

Figure 6: Household usage of toilet cleaners and bleach, 2006-12

##### Regular bleach most likely to be used for laundry-related purposes

Figure 7: Use occasions for bleach and cleaning products containing bleach, November 2012

##### Attitudes toward bleach/disinfectants

Figure 8: Attitudes toward bleach/disinfectants, November 2012

##### Specialized toilet cleaners compete with a variety of more general cleaners

Figure 9: Types of products used to clean the toilet, November 2012

##### Toilet cleaner attribute importance

Figure 10: Toilet cleaner attribute importance, very important, November 2012

##### Attitudes toward cleaning the toilet

Figure 11: Attitudes toward cleaning the toilet, November 2012

#### What we think

### Issues in the Market

How can specialized toilet cleaners compete more effectively against all the different products consumers use to clean toilets?

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Toilet Cleaning and Bleach - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

How can bleach continue on a positive course after posting its first sales increase in many years?

How widespread is concern that bleach is too harsh for regular use? Will competitive ads describing bleach as harsh strike a nerve?

## Insights and Opportunities

Reinvigorating growth in toilet care

Education on all the options

Humor and connection

Targeting men

Can green toilet cleaners cut it?

## Trend Applications

Trend: Help Me Help Myself

Trend: Extend My Brand

Mintel Futures: Human

## Market Size and Forecast

Key points

Sales turn positive in 2012 after steady declines

Figure 12: Total U.S. retail sales and forecast of toilet cleaners and bleach, at current prices, 2007-17

Figure 13: Total U.S. retail sales and forecast of toilet cleaners and bleach, at inflation-adjusted prices, 2007-17

Fan chart forecast

Figure 14: Total U.S. retail sales and fan chart forecast of toilet cleaners and bleach, at current prices, 2007-17

## Market Drivers

Household income stabilizes but remains weak

Figure 15: Median household income, in inflation-adjusted dollars, 2001-11

Consumer confidence rising but still fragile

Figure 16: Thomson Reuters/University of Michigan Index of Consumer Sentiment, 2007-13

Households with kids declining

Figure 17: Households, by presence of children, 2002-12

Growing influence of Hispanic market

Figure 18: Population by race and Hispanic origin, 2007-17

## Competitive Context

Competition from multipurpose cleaning products

Figure 19: Types of products used to clean the toilet, November 2012

Figure 20: Total U.S. retail sales of household surface cleaners, by segment, at current prices, 2010 and 2012

Appealing to the specialty product mindset

## Segment Performance

Key points

Bleach back on track, for now, while toilet cleaners continue to decline

Figure 21: Total U.S. retail sales of toilet cleaners and bleach, by segment, at current prices, 2010 and 2012

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Toilet Cleaning and Bleach - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Segment Performance—Bleach

### Key points

Sales rebound in 2012 with new concentrated formulas

Figure 22: Total U.S. retail sales and forecast of bleach, at current prices, 2007-17

## Segment Performance—Toilet Cleaners

### Key points

Toilet cleaner sales weak in face of competition from multipurpose products

Figure 23: Total U.S. retail sales and forecast of toilet cleaners, at current prices, 2007-17

## Retail Channels

### Key points

Other channels lead the way in total sales

Figure 24: Total U.S. retail sales of toilet cleaners and bleach, by channel, at current prices, 2010 and 2012

Other channels experience big turnaround

Supermarkets see drop in category sales

Drug stores struggle to compete

Figure 25: Total U.S. retail sales of toilet cleaners and bleach, by channel, at current prices, 2007-12

## Leading Companies

### Key points

Clorox leads toilet cleaners and bleach as well as surface cleaners overall

Figure 26: MULO sales and share of toilet cleaners and bleach, by leading companies, 2011 and 2012

## Brand Share—Bleach

### Key points

Clorox helps to reverse segment decline but loses market share

Clorox focuses on innovation to defend share and expand use of bleach

Manufacturer sales of bleach

Figure 27: MULO sales and share of bleach, by leading companies and brands, 2011 and 2012

## Brand Share—Toilet Cleaners

### Key points

Lysol gains on Clorox with existing products and new Power & Free line

Scrubbing Bubbles tackles the task of toilet cleaning

Manufacturer sales of toilet cleaners

Figure 28: MULO sales and share of toilet cleaners, by leading companies and brands, 2011 and 2012

## Innovations and Innovators

Cleaning power for tough stains and limescale

Convenience and ease of use

Eco-friendly alternatives

One for the boys

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Toilet Cleaning and Bleach - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Bleach in a new form

## Marketing Strategies

Clorox: Introduce bleach to a new generation of consumers

Figure 29: Clorox bleach "Bleach it Away: Mommy I Went Potty" TV ad, 2012

Trade on long-term brand equity

Figure 30: Clorox toilet cleaners "commode, potty, john, loo" TV ad, 2012

Lysol: Exploit bleach's perceived liabilities

Removes stains better than bleach

Figure 31: Lysol Complete "Do the Whole Job" TV ad, 2012

Less harsh than bleach

Figure 32: Lysol Power & Free "Change the Way We Clean" TV ad, 2012

Scrubbing Bubbles: Minimize the chore of toilet cleaning

Figure 33: Scrubbing Bubbles Fresh Brush and Toilet Cleaning Gel "Did the Trick Without the Ick" TV ad, 2012

## Usage of Toilet Cleaners and Bleach

Key points

Bleach experiences modest decline in usage

In-bowl toilet cleaners more popular than in-tank options

Figure 34: Household usage of toilet cleaners and bleach, 2006-12

Young adults less likely to use bleach

Figure 35: Household usage of toilet cleaners and bleach, by age, August 2011-August 2012

Incidence increases with household size

Figure 36: Household usage of toilet cleaners and bleach, by household size, August 2011-August 2012

## Use Occasions for Bleach and Cleaning Products with Bleach

Key points

Regular bleach most likely to be used for laundry-related purposes

Figure 37: Use occasions for bleach and cleaning products containing bleach, November 2012

Lower-income households more likely to use bleach for household cleaning

Figure 38: Use occasions for bleach, by household income, November 2012

## Attitudes Toward Bleach/Disinfectants

Key points

Disinfection is important to family health

Bleach gets credit for versatility

Relatively few concerned about harshness or safety of bleach

Figure 39: Attitudes toward bleach/disinfectants, by gender and age, November 2012

Lower-income consumers view bleach as a versatile household cleaner

Figure 40: Attitudes toward bleach/disinfectants, by household income, November 2012

## Toilet Cleaning and Product Purchasing Responsibility

Women still more likely to clean and shop, but gender roles may be shifting

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Toilet Cleaning and Bleach - US - March 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 41: toilet cleaning and product purchasing responsibility, by gender and age, November 2012

## Types of Products Used to Clean the Toilet

### Key points

Specialized toilet cleaners compete with a variety of general cleaners

Figure 42: Types of products used to clean the toilet, by gender and age, November 2012

Higher-income consumers more likely to use specialized products

Figure 43: Types of products used to clean the toilet, by household income, November 2012

Larger households opt for convenience

Figure 44: Types of products used to clean the toilet, by household size, November 2012

## Toilet Cleaner Attribute Importance

### Key points

Germ killing and stain removal are the bottom line in toilet cleaning

Longer lasting and limescale treatment also important

Product function and form attributes of moderate importance

Figure 45: Toilet cleaner attribute importance, November 2012

Gender differences in attribute importance minimal among young adults

Figure 46: Toilet cleaner attribute importance, by gender and age, November 2012

Larger households more likely to place importance on most attributes

Figure 47: Toilet cleaner attribute importance, by gender and age, November 2012

## Attitudes Toward Cleaning the Toilet

### Key points

Need for thorough and regular toilet cleaning acknowledged

Shiny and stain-free bowl a more important cue than a fresh scent

Store brand toilet cleaners get relatively little credit for effectiveness

Figure 48: Attitudes toward cleaning the toilet, by gender and age, November 2012

## Impact of Race and Hispanic Origin

### Key points

Black and Hispanic consumers especially engaged in home care

Figure 49: General household care attitudes—strongly agree, by home care segments, November 2012

Black consumers more likely to use bleach in laundry and cleaning

Figure 50: Use occasions for bleach, by race and Hispanic origin, November 2012

Figure 51: Use occasions for cleaning products with bleach, by race and Hispanic origin, November 2012

For black consumers, bleach/disinfectants important to family health

Figure 52: Attitudes toward bleach/disinfectants, by race and Hispanic origin, November 2012

Black consumers use wide variety of products to clean toilet

Figure 53: Types of products used to clean the toilet, by race and Hispanic origin, November 2012

Black and Hispanic consumers hold toilet cleaners to high standards

Figure 54: Toilet cleaner attribute importance, by race and Hispanic origin, November 2012

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Toilet Cleaning and Bleach - US - March 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Emphasizing scent to reach black and Hispanic consumers

Figure 55: Attitudes toward cleaning the toilet, by race and Hispanic origin, November 2012

## Home Care Segmentation Analysis

Figure 56: Home care segments, November 2012

Easy Greens

Demographics

Approach to home care

Attitudes and behaviors toward toilet cleaning and bleach

Opportunity

Unmoveds

Demographics

Approach to home care

Attitudes and behaviors toward toilet cleaning and bleach

Opportunity

Deep Cleaners

Demographics

Approach to home care

Attitudes and behaviors toward toilet cleaning and bleach

Easy Does Its

Demographics

Approach to home care

Attitudes and behaviors toward toilet cleaning and bleach

Opportunity

Home care segment consumer tables

Figure 57: General household care attitudes—strongly agree, by home care segments, November 2012

Figure 58: General household care attitudes—any agree, by home care segments, November 2012

Figure 59: Use occasions for bleach, by home care segments, November 2012

Figure 60: Use occasions for cleaning products with bleach, by home care segments, November 2012

Figure 61: Attitudes toward bleach/disinfectants, by home care segments, November 2012

Figure 62: Types of products used to clean the toilet, by home care segments, November 2012

Figure 63: Toilet cleaner attribute importance, by home care segments, November 2012

Figure 64: Attitudes toward cleaning the toilet, by home care segments, November 2012

Home care segment demographic tables

Figure 65: Home care segments, by demographic, November 2012

Cluster methodology

## SmyphonyIRI /Builders—Key Household Purchase Measures

Overview of bleach

SHC bleach

Consumer insights on key purchase measures

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Toilet Cleaning and Bleach - US - March 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Brand map

Figure 66: Brand map, selected brands of bleach buying rate, by household penetration, 52 weeks ending June 24, 2012

## Brand leader characteristics

## Key purchase measures

Figure 67: Key purchase measures for the top brands of bleach, by household penetration, 52 weeks ending June 24, 2012

## Overview of household cleaners

## Toilet bowl cleaner/deodorizer

## Consumer insights on key purchase measures

## Brand map

Figure 68: Brand map, selected brands of toilet bowl cleaner buying rate, by household penetration, 52 weeks ending June 24, 2012

## Brand leader characteristics

## Key purchase measures

Figure 69: Key purchase measures for the top brands of toilet bowl cleaner, by household penetration, 52 weeks ending June 24, 2012

## Custom Consumer Groups

### Younger adults in all groups less likely to use bleach in the laundry room

Figure 70: Use occasions for bleach, by race/Hispanic origin and age, November 2012

### Older in all groups more likely to value versatility of bleach

Figure 71: Attitudes toward bleach/disinfectants, by race/Hispanic origin and age, November 2012

### Younger black consumers interested in convenient all-purpose toilet cleaners

Figure 72: Types of products used to clean the toilet, by race/Hispanic origin and age, November 2012

### Young adults in all groups less likely to value frequent toilet cleaning

Figure 73: Attitudes toward cleaning the toilet, by race and Hispanic origin, November 2012

## Appendix: Other Useful Consumer Tables

Figure 74: Use occasions for bleach, by gender and age, November 2012

Figure 75: Use occasions for bleach, by household size, November 2012

Figure 76: Use occasions for cleaning products with bleach, by gender and age, November 2012

Figure 77: Use occasions for cleaning products with bleach, by household income, November 2012

Figure 78: Use occasions for cleaning products with bleach, by household size, November 2012

Figure 79: Attitudes toward bleach/disinfectants, by household size, November 2012

Figure 80: Toilet cleaner attribute importance, by household income, November 2012

Figure 81: Attitudes toward cleaning the toilet, by household income, November 2012

Figure 82: Attitudes toward cleaning the toilet, by household size, November 2012

## Appendix: Trade Associations

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)