

## Hard Surface Cleaning and Care - UK - April 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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



“The dominance of multipurpose cleaners, a lack of product development and reduced advertising spend have created a perfect storm for the hard surface cleaners category, which continues to struggle to show growth despite the rising population and number of households.”

– **Lucy Cornford, Category Director – Household Care**

This report looks at the following areas:

- Popularity of multipurpose cleaners is fostering a trade-down mentality
- The benefits of injecting 'fun' into advertising
- Raising interest in natural cleaners

The value of the hard surface cleaners category declined by an estimated 3% in 2016 to £292 million as the popularity of multipurpose cleaners continues to take its toll. However, there are signs that the promotions and discounting that have also plagued the category are beginning to slow, suggesting that growth will return to the category as population and number of households see a rise.

**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

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@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

# Hard Surface Cleaning and Care - UK - April 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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

## Table of Contents

### Overview

- What you need to know
- Products covered in this Report
- Excluded

### Executive Summary

- The market
- A return to growth expected
  - Figure 1: Best- and worst-case forecast for UK retail value sales of hard surface cleaners, 2011-21
- Companies and brands
- Flash and Dettol lead for multipurpose cleaners
  - Figure 2: Brand shares in the UK multipurpose kitchen and floor market, year ending November 2016
- Flash gains momentum in bath and shower cleaners
  - Figure 3: Brand shares in the UK bath and shower cleaners market, year ending November 2016
- Reduced NPD provides little incentive to trade up
  - Figure 4: New product development in the hard surface care category, by sub-category, January 2014-February 2017
- The consumer
- Trigger spray maintains its popularity
  - Figure 5: Usage of hard surfacing cleaning products, November 2015 and November 2016
- Sprays preferred for most cleaning tasks, excluding floors
  - Figure 6: Preference for cleaner type, by area of the home, November 2016
- Parents with young children cleaning more
  - Figure 7: Changes in frequency of surface cleaning, November 2016
- Young men using more product
  - Figure 8: Changes in cleaning product usage, November 2016
- Price and convenience are dominant factors
  - Figure 9: Changes in frequency of buying hard surface cleaning products, November 2016
- Universal results are crucial, but transparency is also important
  - Figure 10: Attitudes towards hard surface cleaning products, November 2016
- Familiarity breeds positive brand perceptions
  - Figure 11: Hard surface cleaning and care correspondence analysis, November 2016
- What we think

### Issues and Insights

- Popularity of multipurpose cleaners is fostering a trade-down mentality
- The facts
- The implications
- The benefits of injecting 'fun' into advertising

**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 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Hard Surface Cleaning and Care - UK - April 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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

The facts

The implications

Raising interest in natural cleaners

The facts

The implications

## The Market – What You Need to Know

Antibacterial multipurpose products leave their mark

Grocery channels are first point of call

Potential for more of a design focus

Leveraging on the emotional aspect of cleaning

## Market Size and Forecast

A fluctuating market

Figure 12: UK retail value sales of hard surface cleaners\*, at current and constant prices, 2011-21

Market expected to return to growth

Figure 13: Best- and worst-case forecast for UK retail value sales of hard surface cleaners, 2011-21

Forecast methodology

## Market Segmentation

Antibacterial multipurpose cleaners buck downward trend

Figure 14: Retail value sales of the UK hard surface cleaners\*, by segment, 2015 and 2016 (est)

Value of specialised cleaners under threat

## Channels to Market

Supermarket remains the strongest channel

Figure 15: UK retail value sales of hard surface, cleaning and care products\*, by retail channel, 2015 and 2016 (est)

Potential for new retail services to make an impact

## Market Drivers

Population growth means more cleaning

Figure 16: Trends in the age structure of the UK population, 2011-21

Potential for more focus on product design

Figure 17: UK households, by size, 2011-21

The impact of rising rentals

Figure 18: Renters' attitudes, April 2016

The emotional impact of a clean home

Figure 19: Attitudes towards cleaning the home, May 2016

Implications of Brexit on product regulations

## Companies and Brands – What You Need to Know

Clean in a Flash

Value of Method and Cillit Bang may be impacted by health concerns

**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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Hard Surface Cleaning and Care - UK - April 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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

Reduced NPD provides little incentive for trading up  
Recorded adspend slips back into decline

## Market Share

Flash and Dettol lead for multipurpose kitchen and floor cleaners...

Figure 20: Brand shares in the UK multipurpose kitchen and floor market, years ending November 2015 and 2016

...but own-label has a strong year

Flash gains momentum in bath and shower cleaners

Figure 21: Brand shares in the UK bath and shower cleaners market, years ending November 2015 and 2016

Are health concerns impacting brand choice for bathroom cleaners?

## Launch Activity and Innovation

Reduced NPD provides little incentive to trade up

Figure 22: New product development in the hard surface care category, by sub-category, January 2014-February 2017

True innovation lacking

Figure 23: New product development in the hard surface care category, by launch type, January 2014-February 2017

Figure 24: New products and new varieties/range extensions in the hard surface care category, 2016-17

Own-label development continues to struggle

Figure 25: New product development in the hard surface care category, own-label vs branded, January 2014-February 2017

Figure 26: Examples of own-label hard surface cleaning products with new product or new variety/range extension launch type, 2016

Waitrose and Ecozone focus on eco-friendly innovations

Figure 27: New product development in the hard surface, cleaning and care category, top 7 ultimate companies plus other, 2016

Figure 28: Examples of new product development in the hard surface care category from Waitrose and Ecozone, 2016

Environmental claims a big focus

Figure 29: New product development in the hard surface, cleaning and care category, by top 10 claims for 2016, 2015 and 2016

## Advertising and Marketing Activity

Total adspend decreases

Figure 30: Recorded above-the-line, online display and direct mail total advertising expenditure on hard surface cleaners\*, 2014-16

P&G and RB dominate advertising spend

Figure 31: Recorded above-the-line, online display and direct mail total advertising expenditure on hard surface cleaners\*, by leading companies based on 2016, 2014-16

Digital advertising spend sees a rise

Figure 32: Recorded above-the-line, online display and direct mail total advertising expenditure on hard surface cleaners\*, by media type, 2014-16

Figure 33: P&G #FlashDog advert, March 2017

Nielsen Ad Intel coverage

## The Consumer – What You Need to Know

Trigger sprays most popular cleaning format...

...but not for floors

Parents with young children cleaning more

Young men using more product

The dominant factors of price and convenience

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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

# Hard Surface Cleaning and Care - UK - April 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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

Universal results are crucial, but transparency is also important  
Familiarity breeds positive brand perceptions

## Product Usage and Purchasing

Trigger spray maintains its popularity

Figure 34: Usage of hard surfacing cleaning products, November 2015 and November 2016

Majority of adults use three or fewer types

Figure 35: Repertoire of hard surface cleaning products used in the last 6 months, November 2016

Women more likely to use and buy products

Figure 36: Buyers of hard surface cleaning products, by gender, November 2016

## Cleaner Type Preference

Spray products the dominant choice...

Figure 37: Preference for cleaner type, by area of the home, November 2016

...but not for cleaning floors

Older cleaners show preference for traditional formats

## Frequency of Surface Cleaning and Amount of Product Used

Parents of under-5s are cleaning more

Figure 38: Changes in frequency of surface cleaning, November 2016

Younger men using more product to clean

Figure 39: Changes in cleaning product usage, November 2016

## Frequency of Buying Cleaning Products

The dominant factors of price and convenience

Figure 40: Changes in frequency of buying hard surface cleaning products, November 2016

Specialist cleaners struggle

Boosting the profile of natural cleaners

## Attitudes towards Hard Surface Cleaning Products

Universal results are important

Figure 41: Attitudes towards hard surface cleaning products, November 2016

Transparency is crucial

An alternative approach to safety

Figure 42: pHur Water, November 2016

## Brand Associations

Familiarity breeds positive perceptions

Figure 43: Perceptions of selected hard surface cleaning brands, November 2016

Core brand messages risk getting lost

Figure 44: Associations of selected hard surface cleaning brands, November 2016

Innovation needs a helping hand

## Appendix – Data Sources, Abbreviations and Supporting Information

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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Hard Surface Cleaning and Care - UK - April 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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

Data sources

Abbreviations

Fan chart forecast

Correspondence analysis methodology

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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)