

## Cleaning the House - US - June 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.



“Housecleaning is a time-consuming but emotionally satisfying task that consumers view as important not only in making their homes presentable but also in keeping their families healthy. While housecleaners express interest in products that make cleaning faster and more efficient, they are more likely to prioritize cleaning effectiveness.”

– John Owen, Senior Household Analyst

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

- What motivates consumers to clean the house?
- Quick and easy vs. thorough and regular
- Housecleaning and health closely associated
- Could marketers encourage men to do a greater share of the cleaning?

In spite of ever-present time pressures, homeowners and renters continue to devote a significant amount of time over the course of a week to housecleaning. Cleaning, however, is more likely to happen a little at a time, as time allows, rather than all at once in a thorough top-to-bottom cleaning. While opportunities exist for products that save time and effort, consumers still place importance on getting the job done right. Disinfection is as important as ever, and there is increasing recognition of the connection between housecleaning and health. For marketers and retailers, these insights and others provide opportunities for creating closer connections with housecleaning consumers.

his report examines consumer attitudes and behaviors toward housecleaning, including the amount of time people spend doing housecleaning, their approach to housecleaning overall as well as to individual cleaning tasks, and their preferences in cleaning product attributes and benefits. The following cleaning tasks are covered:

- cleaning the kitchen (i.e., countertop, stovetop, tiles)
- cleaning the oven
- vacuuming the floors
- mopping/sweeping floors
- polishing/dusting items
- cleaning the bathroom (i.e., bath, sinks, tiles)
- toilet cleaning
- window cleaning
- cleaning upholstery/fabrics.

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

# Cleaning the House - US - June 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  
Consumer survey data  
Advertising creative  
Abbreviations and terms  
Abbreviations  
Terms

### Executive Summary

A little less than five hours a week spent on cleaning  
Figure 1: Time spent cleaning the house, by gender and age, February 2013

Cleaning more likely to happen a little at a time than all at once  
Figure 2: General housecleaning approach: a little at a time vs. thorough, top-to-bottom cleaning, by time spent cleaning, February 2013

Approaches vary from task to task  
Figure 3: Approach to various cleaning tasks, February 2013

Consumers prioritize cleaning performance over other product attributes  
Figure 4: Importance of cleaning product qualities, February 2013

Combination of visible and invisible cues signal sufficient cleaning  
Figure 5: Signals for having cleaned enough, February 2013

Strong emotional motivations for housecleaning and care  
Different interpretations of the link between a clean home and health  
Figure 6: General home care attitudes, strongly agree, February 2013

What we think

### Issues and Insights

What motivates consumers to clean the house?  
Quick and easy vs. thorough and regular  
Housecleaning and health closely associated  
Could marketers encourage men to do a greater share of the cleaning?

### Trend Applications

Trend: Life Hacking  
Trend: The Unfairer Sex  
Mintel Futures: Old Gold

### Market Overview

Household surface cleaners  
Category sales stuck in low gear, but new products show potential

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)

# Cleaning the House - US - June 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 7: Total U.S. retail sales of household surface cleaners, at current prices, 2007-17

Figure 8: Total U.S. retail sales of household surface cleaners, at inflation-adjusted prices, 2007-17

## Fan chart forecast

Figure 9: Total U.S. retail sales and fan chart forecast of household surface cleaners, at current prices, 2007-17

## Household cleaning equipment

Cleaning tools/mops/brooms sets mostly negative tone for total category

Saving money, time, and effort

## What's next?

Figure 10: Total U.S. retail sales of household cleaning equipment at current prices, 2007-17

Figure 11: Total U.S. retail sales of household cleaning equipment at inflation-adjusted prices, 2007-17

## Fan chart forecast of household cleaning equipment

Figure 12: Total U.S. sales of household cleaning equipment fan chart forecast with best- and worst-case scenarios, 2007-17

## Market Drivers

Time spent on housework declined just slightly between 2003 and 2011

Gender gap in housework continues to narrow

Figure 13: Time spent daily on housework, hours, 2003-11

Number of households increases, but households with kids declines

Figure 14: Households, by presence of children, 2002-12

Average household size edges down

Figure 15: Number of people in household, 2002-12

Growing influence of Hispanic market

Figure 16: Households with own children, by race and Hispanic origin of householder, 2012

Figure 17: Population, by race and Hispanic origin, 2008-18

Connection between housecleaning and health growing stronger

Dog and cat ownership ticks up

Figure 18: Dog and cat ownership, 2008-12

## Innovations and Innovators

### Overview

SC Johnson Smart Twist: all-in-one and specialized at the same time

Windex Kitchen and Bathroom Touch-Up Cleaners keep cleaning within reach

Lysol Power & Free balances effectiveness and safety claims

Swiffer adds power to convenience with Mr. Clean

## Marketing Strategies

Lysol "Healthing" campaign rebrands cleaning as keeping family healthy

Figure 19: Lysol "Stop Just Cleaning, Start Healthing" TV ad, 2013

Figure 20: Lysol "Perfuming vs. Healthing" TV ad, 2013

For natural brands, healthy means toxin-free

Seventh Generation "Campaign for a Toxin-Free Generation"

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)

# Cleaning the House - US - June 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.

Ology "formulated to be free of harmful chemicals"

Swiffer shifts emphasis from time-savings to cleaning effectiveness

Figure 21: Swiffer "Dump Your Old Mop" TV ad, 2013

Pine-Sol emphasizes no-nonsense cleaning power and expertise

Figure 22: Pine-Sol "All-New Dirt Snugger" TV ad, 2013

## Time Spent Cleaning the House

Key points

A little less than five hours a week spent on cleaning

Women spend more time cleaning than men; gap widest at 55+

Figure 23: Time spent cleaning the house, by gender and age, February 2013

Higher income consumers devote less time to housecleaning

Figure 24: Time spent cleaning the house, by household income, February 2013

More time spent cleaning in larger households

Figure 25: Time spent cleaning the house, by household size, February 2013

## Changes in Amount of Time Spent Housecleaning

Key points

Consumers slightly more likely to report an increase in cleaning time

Figure 26: General housecleaning approach: less time vs. more time, February 2013

Young adults, especially women, more likely to increase cleaning time

Figure 27: General housecleaning approach: less time vs. more time, by gender and age, February 2013

Increasing household size brings increase in cleaning time

Figure 28: General housecleaning approach: less time vs. more time, by household size, February 2013

## Overall Approach to Cleaning

Key points

Cleaning more likely to happen a little at a time than all at once

Figure 29: General housecleaning approach: a little at a time vs. thorough, top-to-bottom cleanings, by time spent cleaning, February 2013

Most don't follow a set cleaning schedule

Figure 30: General housecleaning approach: clean when I have the time vs. schedule time to clean, February 2013

More likely to keep the house clean than let it get messy before cleaning

Figure 31: General housecleaning approach: waiting until things get messy vs. keeping home clean most of the time, by time spent cleaning, February 2013

## Approach to Different Cleaning Tasks

Key points

Kitchen, bathroom, toilet get most constant and thorough cleaning

Oven, upholstery, fabrics, windows least likely to get regular cleaning

Vacuuuming, mopping, sweeping, and dusting occupy a middle ground

Figure 32: Approach to various cleaning tasks, February 2013

Women considerably more likely to give the kitchen constant cleanup

Figure 33: Approach to cleaning the kitchen, by gender and age, February 2013

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)

## Cleaning the House - US - June 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.

### Kitchens in larger households more likely to get constant cleanup

Figure 34: Approach to cleaning the kitchen, by household size, February 2013

### Opportunity to increase frequency of toilet cleaning among young adults

Figure 35: Approach to cleaning the toilet, by gender and age, February 2013

### Vacuuming, floor mopping/sweeping more frequent in larger households

Figure 36: Approach to vacuuming the floors, by household size, February 2013

Figure 37: Approach to mopping/sweeping floors, by household size, February 2013

### Window cleaning not a priority for any group, especially women 55z+

Figure 38: Approach to cleaning windows, by gender and age, February 2013

## Multipurpose Cleaners vs. Specialized Cleaners

### Key points

#### Multipurpose cleaners preferred over specialized products

Figure 39: General housecleaning approach: multipurpose cleaning products vs. specialized products, February 2013

#### Lighter cleaners more likely to favor multipurpose products

Figure 40: General housecleaning approach: multipurpose cleaning products vs. specialized products, by time spent cleaning, February 2013

## Importance of Cleaning Product Qualities

### Key points

#### Consumers prioritize cleaning performance over other product attributes

Figure 41: Importance of cleaning product qualities, by gender and age, February 2013

#### Heaviest cleaners more interested in effectiveness than speed

Figure 42: Importance of cleaning product qualities, by time spent cleaning, February 2013

## What it Means to be Clean: Cues for Having Cleaned Enough

### Key points

#### Combination of visible and invisible cues signal sufficient cleaning

#### Restoring or maintaining a sense of order in the home

Figure 43: Signals for having cleaned enough, by gender and age, February 2013

#### Heavier cleaners rely more on invisible cues, less on superficial

Figure 44: Signals for having cleaned enough, by time spent cleaning, February 2013

## Attitudes toward Home Care

### Key points

#### Strong emotional motivations for housecleaning and care

#### Different interpretations of the link between a clean home and health

#### Many housecleaners value convenience more than perfection

Figure 45: General home care attitudes, February 2013

#### Women more deeply engaged in home care than men

Figure 46: General home care attitudes, by gender and age, February 2013

#### More time spent cleaning reflects deeper care and engagement

Figure 47: General home care attitudes, by time spent cleaning, February 2013

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)

# Cleaning the House - US - June 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.

## Impact of Race and Hispanic Origin

### Key points

#### Hispanics devote more time to housecleaning than other groups

Figure 48: Time spent cleaning the house, by race/Hispanic origin, February 2013

#### Black and Hispanic consumers more likely to do top-to-bottom cleanings

Figure 49: General housecleaning approach: a little at a time vs. thorough, top-to-bottom cleaning, by time spent cleaning, by race/Hispanic origin, February 2013

#### Hispanics likely to give their kitchens constant cleanups

Figure 50: Approach to cleaning the kitchen, by race/Hispanic origin, February 2013

#### Black and Hispanic consumers place emphasis on bathroom cleaning

Figure 51: Approach to cleaning the bathroom, by race/Hispanic origin, February 2013

#### Disinfection, scent, eco-friendliness important to blacks, Hispanics

Figure 52: Importance of cleaning product qualities, by race/Hispanic origin, February 2013

#### Black and Hispanic consumers especially engaged in housecleaning

Figure 53: General home care attitudes, by race/Hispanic origin, February 2013

## Household Care Segmentation – Cluster Analysis

Figure 54: Household care segments, February 2013

### Super Cleaners

#### Demographics

#### Household care attitudes

#### Approach to cleaning the house

#### Opportunity

#### Disengageds

#### Demographics

#### Household care attitudes

#### Approach to cleaning the house

#### Opportunity

#### Easy Greens

#### Demographics

#### Household care attitudes

#### Approach to cleaning the house

#### Opportunity

### Household care segment characteristic tables

Figure 55: General home care attitudes, strongly agree, by household care segments, February 2013

Figure 56: General home care attitudes, any agree, by household care segments, February 2013

Figure 57: Time spent cleaning the house, by household care segments, February 2013

Figure 58: General housecleaning approach: less time vs. more time, by household care segments, February 2013

Figure 59: General housecleaning approach: a little at a time vs. thorough, top-to-bottom cleaning, by household care segments, February 2013

Figure 60: General housecleaning approach: clean when I have the time vs. schedule time to clean, by household care segments, February 2013

Figure 61: General housecleaning approach: waiting until things get messy vs. keeping home clean most of the time, by time spent cleaning, by household care segments, February 2013

**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)

## Cleaning the House - US - June 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 62: Approach to cleaning the toilet, by household care segments, February 2013
- Figure 63: Approach to cleaning the bathroom, by household care segments, February 2013
- Figure 64: Approach to cleaning the kitchen, by household care segments, February 2013
- Figure 65: Approach to cleaning windows, by household care segments, February 2013
- Figure 66: Approach to cleaning the oven, by household care segments, February 2013
- Figure 67: Approach to vacuuming the floors, by household care segments, February 2013
- Figure 68: Approach to mopping/sweeping floors, by household care segments, February 2013
- Figure 69: Approach to polishing/dusting items, by household care segments, February 2013
- Figure 70: Approach to cleaning upholstery/fabrics, by household care segments, February 2013
- Figure 71: General housecleaning approach: multipurpose cleaning products vs. specialized products, by household care segments, February 2013
- Figure 72: Importance of cleaning product qualities, by household care segments, February 2013
- Figure 73: Signals for having cleaned enough, by household care segments, February 2013

### Household care segment demographic tables

- Figure 74: Household care segments, by demographic, February 2013

### Household care segmentation methodology

## Custom Consumer Groups

### Presence of kids increases cleaning time for both men and women

- Figure 75: Time spent cleaning the house, by gender and presence of children in household, February 2013

### Women, with or without kids, more likely to clean the kitchen constantly

- Figure 76: Approach to cleaning the kitchen, by gender and presence of children in household, February 2013

### Presence of young kids impacts dads' approach to toilet cleaning

- Figure 77: Approach to cleaning the bathroom, by gender and presence of children in household, February 2013

### Kids have a bigger impact on men's cleaning attitudes than women's

- Figure 78: General home care attitudes, by gender and presence of children in household, February 2013

## Appendix – Other Useful Consumer Tables

### Approach to cleaning the toilet

- Figure 79: Approach to cleaning the toilet, by gender and age, February 2013
- Figure 80: Approach to cleaning the toilet, by household income, February 2013
- Figure 81: Approach to cleaning the toilet, by household size, February 2013

### Approach to cleaning the bathroom

- Figure 82: Approach to cleaning the bathroom, by gender and age, February 2013
- Figure 83: Approach to cleaning the bathroom, by household income, February 2013
- Figure 84: Approach to cleaning the bathroom, by household size, February 2013
- Figure 85: Approach to cleaning the bathroom, by time spent cleaning, February 2013

### Approach to cleaning the kitchen

- Figure 86: Approach to cleaning the kitchen, by household income, February 2013

### Approach to cleaning windows

- Figure 87: Approach to cleaning windows, by household income, February 2013
- Figure 88: Approach to cleaning windows, by household size, February 2013

**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)

## Cleaning the House - US - June 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 89: Approach to cleaning windows, by time spent cleaning, February 2013

### Approach to cleaning the oven

Figure 90: Approach to cleaning the oven, by gender and age, February 2013

Figure 91: Approach to cleaning the oven, by household income, February 2013

Figure 92: Approach to cleaning the oven, by time spent cleaning, February 2013

### Approach to vacuuming the floors

Figure 93: Approach to vacuuming the floors, by gender and age, February 2013

Figure 94: Approach to vacuuming the floors, by household income, February 2013

Figure 95: Approach to vacuuming the floors, by time spent cleaning, February 2013

### Approach to mopping/sweeping floors

Figure 96: Approach to mopping/sweeping floors, by gender and age, February 2013

Figure 97: Approach to mopping/sweeping floors, by household income, February 2013

Figure 98: Approach to mopping/sweeping floors, by time spent cleaning, February 2013

### Approach to dusting

Figure 99: Approach to polishing/dusting items, by gender and age, February 2013

Figure 100: Approach to polishing/dusting items, by household income, February 2013

Figure 101: Approach to polishing/dusting items, by time spent cleaning, February 2013

### Approach to cleaning upholstery/fabrics

Figure 102: Approach to cleaning upholstery/fabrics, by gender and age, February 2013

Figure 103: Approach to cleaning upholstery/fabrics, by household income, February 2013

Figure 104: Approach to cleaning upholstery/fabrics, by household size, February 2013

Figure 105: Approach to cleaning upholstery/fabrics, by time spent cleaning, February 2013

### Importance of cleaning product qualities

Figure 106: Importance of cleaning product qualities, by household income, February 2013

Figure 107: Importance of cleaning product qualities, by household size, February 2013

### What it means to be clean: cues for having cleaned enough

Figure 108: Signals for having cleaned enough, by household income, February 2013

### Attitudes toward home care

Figure 109: General home care attitudes, any agree, by gender and age, February 2013

Figure 110: General home care attitudes, any agree, by household income, February 2013

Figure 111: General home care attitudes, any agree, by household size, February 2013

Figure 112: General home care attitudes, any agree, by time spent cleaning, February 2013

Figure 113: General home care attitudes, strongly agree, by household income, February 2013

Figure 114: General home care attitudes, strongly agree, by household size, February 2013

## 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)