

Cleaning the House - US - June 2014

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.



“Housecleaners may be looking to simplify their approach to housecleaning, but a clean and healthy home is still an important goal. Brands can uncover new opportunities for growth by helping housecleaners clean effectively in every room of the house and encouraging more family members to get involved.”

– John Owen, Senior Household Analyst

This report looks at the following areas:

- Opportunities for more cleaning, room by room
- How can kids be encouraged to do more cleaning?
- How can brands clean up with smaller households?

Housecleaning is an ongoing activity in most homes, a responsibility that most adults either take on themselves or share with others. Busy schedules, however, mean that many consumers clean a little at a time when they have time, placing a premium on products that offer quick cleaning and convenience. Still, in spite of the desire for quick cleaning, consumers derive emotional satisfaction from cleaning the house and place importance on getting the job done right.

BUY THIS
REPORT NOW

VISIT:
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

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 2014

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

Abbreviations and terms

Abbreviations

Terms

Executive Summary

Most do at least some cleaning, devote almost four hours a week to it

Figure 1: Time spent cleaning, by gender and age, March-April 2014

Overall, housecleaners inclined to clean as they go

Figure 2: Overall approach: a little at a time vs top-to-bottom cleaning, by time spent cleaning the house, March-April 2014

Heavier cleaners more likely to prefer specialized cleaning products

Figure 3: Overall approach: multipurpose vs specialized, by time spent cleaning the house, March-April 2014

Heavy housecleaners motivated by more than just dirt and grime

Figure 4: Attitudes toward home care, agree strongly, by amount of time spent cleaning the house, March-April 2014

Cleaning approaches vary by task

Figure 5: Approach to different cleaning tasks, March-April 2014

What it means to be clean differs by room of the house

Figure 6: Cues for having cleaned enough, top three selections, kitchen and bathroom, March-April 2014

Figure 7: Cues for having cleaned enough, top three selections, bedroom and living/family room, March-April 2014

What we think

Issues and Insights

Opportunities for more cleaning, room by room

The issues

The implications

How can kids be encouraged to do more cleaning?

The issues

The implications

How can brands clean up with smaller households?

The issues

The implications

Trend Application

Trend: Minimize Me

Trend: Mood to Order

BUY THIS
REPORT NOW

VISIT: 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

Cleaning the House - US - June 2014

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.

Trend: FSTR HYPR

Market Overview

Household surface cleaners

Slow growth, but opportunities for products that enable easy, effective cleaning

Figure 8: Total US sales and fan chart forecast of household surface cleaners, at current prices, 2008-18

Convenience and ease drive segment shifts

Figure 9: Sales of household surface cleaners, by segment, 2011 and 2013

Declining use of most labor-intensive cleaners reflects shift in habits

Figure 10: Household usage of surface cleaners, 2008-13

Vacuum cleaners

Market regains momentum, but sales still below their 2008 level

Figure 11: Total US sales and fan chart forecast of vacuum cleaners, at current prices, 2008-18

Handling issues prominent on list of vacuum cleaner complaints

Figure 12: Problems with vacuum cleaners, July 2013

Pet owners and allergy sufferers a key market for added features

Figure 13: Willing to pay more for added features and services, by pet ownership and presence of allergy/asthma sufferers in household, July 2013

Market Drivers

Time spent on housework declined just slightly between 2003 and 2012

Gender gap in housework narrows modestly

Figure 14: Time spent daily on housework, minutes, 2003-12

More households, but households getting smaller

Figure 15: Households, by presence of own children, 2003-13

Figure 16: Household size, 2003-13

Growing influence of Hispanic market

Figure 17: Households with own children, by race and Hispanic origin of householder, 2013

Figure 18: Population, by race and Hispanic origin, 2009-19

Innovations and Innovators

Shifting cleaning behaviors drive innovation and vice versa

Gel from Mr. Clean emphasizes spot cleaning

Swiffer continues to innovate with quick-clean equipment

Pine-Sol adds convenience of bucket-free floor cleaning

Windex puts easy cleaning within reach

Coatings reduce need for surface cleaning

Kaboom highlights transparent shield

Improved battery life helps to push cordless vacuum boundaries

Rowenta Delta Force features triangular head to get into corners

Gtech AirRam offers cordless operation and USB connectivity

Dyson Hard combines vacuuming and wiping in a single appliance

BUY THIS
REPORT NOW

VISIT: 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

Cleaning the House - US - June 2014

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.

Marketing Strategies

Swiffer highlights users to demonstrate housecleaning utility

Figure 19: Swiffer "Morty Are You Listening?" TV ad, 2013

Figure 20: Swiffer "The Rukavinas" TV ad, 2014

Figure 21: Swiffer "The Rukavinas" TV ad, 2014

Responsibility for Cleaning the House

Key points

Most adults report doing some or most of the cleaning

Figure 22: Responsibility for cleaning the house, March-April 2014

Women still more likely to view themselves as responsible for cleaning

Figure 23: Does some or most of the cleaning, by gender and age, March-April 2014

Higher-income households more likely to rely on cleaning services

Figure 24: Does some or most of the cleaning, by household income, March-April 2014

Even in larger households, most kids aren't active cleaners

Figure 25: Does some or most of the cleaning, by household size, March-April 2014

Time Spent Cleaning the House

Key points

Women spend more time cleaning, but men may aspire to catch up

Figure 26: Time spent cleaning, by gender and age, March-April 2014

More people in the household means more time spent cleaning

Figure 27: Time spent cleaning, by household size, March-April 2014

Overall Approach to Cleaning

Key points

Housecleaners more inclined to clean as they go...

...placing premium on products that clean quickly and effectively

Figure 28: Overall approach to cleaning, March-April 2014

Smaller households more likely to clean a little at a time

Figure 29: Overall approach to cleaning, by household size, March-April 2014

Heavier cleaners clean more thoroughly...

Figure 30: Overall approach to cleaning, by time spent cleaning the house, March-April 2014

...and are motivated by more than just dirt and grime

Figure 31: Attitudes toward home care, agree strongly, by amount of time spent cleaning the house, March-April 2014

Approach to Different Cleaning Tasks

Key points

Kitchen and bathroom most likely to get constant, thorough cleaning

Emphasis on speed for dusting, floor cleaning

Oven, upholstery, and windows likely to be cleaned only when necessary

Figure 32: Approach to different cleaning tasks, March-April 2014

BUY THIS
REPORT NOW

VISIT: 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

Cleaning the House - US - June 2014

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.

Women 35+ most likely to give bathroom, kitchen constant cleanup

Figure 33: Approach to cleaning the bathroom, by gender and age, March-April 2014

Figure 34: Approach to cleaning the kitchen, by gender and age, March-April 2014

What it Means to be Clean, by Room of the House

Key points

Disinfection and scent are key in bathroom

Kitchen must look nice and be germ-free

Visual cues likely to be enough for bedroom, living room

Figure 35: Cues for having cleaned enough, by rooms of the house, March-April 2014

Household Care Segmentation – Cluster Analysis

Figure 36: Household care segments, March-April 2014

Easy Greens

Demographics

Household care attitudes and approach to cleaning the house

Opportunity

Disengageds

Demographics

Household care attitudes and approach to cleaning the house

Opportunity

Deep Cleaners

Demographics

Household care attitudes and approach to cleaning the house

Opportunity

Household care segment characteristic tables

Figure 37: Attitudes toward home care, by household care segments, March-April 2014

Figure 38: Attitudes toward home care, any agree, by household care segments, March-April 2014

Figure 39: Does some or most of the cleaning, by household care segments, March-April 2014

Figure 40: Time spent cleaning, by household care segments, March-April 2014

Figure 41: overall approach to cleaning, by household care segments, by amount of time spent cleaning the house, March-April 2014

Figure 42: Approach to cleaning the bathroom, by household care segments, March-April 2014

Figure 43: Approach to cleaning the kitchen, by household care segments, March-April 2014

Figure 44: Approach to cleaning the oven, by household care segments, March-April 2014

Figure 45: Approach to vacuuming floors, by household care segments, March-April 2014

Figure 46: Approach to mopping floors, by household care segments, March-April 2014

Figure 47: Approach to sweeping floors, by household care segments, March-April 2014

Figure 48: Approach to dusting items/furniture, by household care segments, March-April 2014

Figure 49: Approach to polishing furniture (eg tables), by household care segments, March-April 2014

Figure 50: Approach to vacuuming fabrics/upholstery, by household care segments, March-April 2014

Figure 51: Approach to spot cleaning fabrics/upholstery, by household care segments, March-April 2014

**BUY THIS
REPORT NOW**

VISIT: 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

Cleaning the House - US - June 2014

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 52: Approach to shampooing fabrics/upholstery, by household care segments, March-April 2014

Figure 53: Approach to windows, by household care segments, March-April 2014

Figure 54: Cues for having cleaned enough, the kitchen, by household care segments, March-April 2014

Figure 55: Cues for having cleaned enough, bathroom, by household care segments, March-April 2014

Figure 56: Cues for having cleaned enough, bedroom, by household care segments, March-April 2014

Figure 57: Cues for having cleaned enough, living room/family room, by household care segments, March-April 2014

Household care segment demographic tables

Figure 58: Household care segments, by demographic, March-April 2014

Household care segmentation methodology

Impact of Race and Hispanic Origin

Key points

Opportunity to help black parents involve their kids in housecleaning

Figure 59: Does some or most of the cleaning, by race/Hispanic origin, March-April 2014

Hispanics spend more time cleaning than other groups

Figure 60: Time spent cleaning, by race/Hispanic origin, March-April 2014

Hispanics tend to more thorough cleaning, more specialized products

Figure 61: overall approach to cleaning, by race/Hispanic origin, March-April 2014

Black and Hispanic consumers deeply engaged in housecleaning

Opportunity for natural cleaning products among Hispanics

Figure 62: Attitudes toward home care, by race and Hispanic origin, March-April 2014

Custom Consumer Groups

Type of home has modest impact on amount of time spent cleaning

Figure 63: Time spent cleaning, by primary residence status, March-April 2014

Renters likely to prefer multipurpose cleaners

Figure 64: overall approach to cleaning, by primary residence status, March-April 2014

Cleaning motivations consistent across homeownership status, home type

Figure 65: Attitudes toward home care, by primary residence status, March-April 2014

Appendix – Other Useful Consumer Tables

Responsibility for cleaning the house

Figure 66: Does some or most of the cleaning, by time spent cleaning, March-April 2014

Time spent cleaning

Figure 67: Time spent cleaning, by household income, March-April 2014

Overall approach to cleaning

Figure 68: Overall approach to cleaning, by gender and age, March-April 2014

Figure 69: Overall approach to cleaning, by household income, March-April 2014

Attitudes toward home care

Figure 70: Attitudes toward home care, by gender and age, March-April 2014

Figure 71: Attitudes toward home care, by household income, March-April 2014

**BUY THIS
REPORT NOW**

VISIT: 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

Cleaning the House - US - June 2014

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 72: Attitudes toward home care, by household size, March-April 2014

Approach cleaning the bathroom

Figure 73: Approach to cleaning the bathroom, by household income, March-April 2014

Figure 74: Approach to cleaning the bathroom, by household size, March-April 2014

Figure 75: Approach to cleaning the bathroom, by race/Hispanic origin, March-April 2014

Figure 76: Approach to cleaning the bathroom, by time spent cleaning the house, March-April 2014

Approach cleaning the kitchen

Figure 77: Approach to cleaning the kitchen, by household income, March-April 2014

Figure 78: Approach to cleaning the kitchen, by household size, March-April 2014

Figure 79: Approach to cleaning the kitchen, by race/Hispanic origin, March-April 2014

Figure 80: Approach to cleaning the kitchen, by time spent cleaning the house, March-April 2014

Approach to cleaning the oven

Figure 81: Approach to cleaning the oven, by gender and age, March-April 2014

Figure 82: Approach to cleaning the oven, by household income, March-April 2014

Figure 83: Approach to cleaning the oven, by household size, March-April 2014

Figure 84: Approach to cleaning the oven, by race/Hispanic origin, March-April 2014

Figure 85: Approach to cleaning the oven, by time spent cleaning the house, March-April 2014

Approach to vacuuming floors

Figure 86: Approach to vacuuming floors, by gender and age, March-April 2014

Figure 87: Approach to vacuuming floors, by household income, March-April 2014

Figure 88: Approach to vacuuming floors, by household size, March-April 2014

Figure 89: Approach to vacuuming floors, by race/Hispanic origin, March-April 2014

Figure 90: Approach to vacuuming floors, by time spent cleaning the house, March-April 2014

Approach to mopping floors

Figure 91: Approach to mopping floors, by gender and age, March-April 2014

Figure 92: Approach to mopping floors, by household income, March-April 2014

Figure 93: Approach to mopping floors, by household size, March-April 2014

Figure 94: Approach to mopping floors, by race/Hispanic origin, March-April 2014

Figure 95: Approach to mopping floors, by time spent cleaning the house, March-April 2014

Approach to sweeping floors

Figure 96: Approach to sweeping floors, by gender and age, March-April 2014

Figure 97: Approach to sweeping floors, by household income, March-April 2014

Figure 98: Approach to sweeping floors, by household size, March-April 2014

Figure 99: Approach to sweeping floors, by race/Hispanic origin, March-April 2014

Figure 100: Approach to sweeping floors, by time spent cleaning the house, March-April 2014

Approach to dusting items/furniture

Figure 101: Approach to dusting items/furniture, by gender and age, March-April 2014

Figure 102: Approach to dusting items/furniture, by household income, March-April 2014

Figure 103: Approach to dusting items/furniture, by household size, March-April 2014

**BUY THIS
REPORT NOW**

VISIT: 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

Cleaning the House - US - June 2014

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 104: Approach to dusting items/furniture, by race/Hispanic origin, March-April 2014

Figure 105: Approach to dusting items/furniture, by household care segments, March-April 2014

Approach to polishing furniture

Figure 106: Approach to polishing furniture (eg tables), by gender and age, March-April 2014

Figure 107: Approach to polishing furniture (eg tables), by household income, March-April 2014

Figure 108: Approach to polishing furniture (eg tables), by household size, March-April 2014

Figure 109: Approach to polishing furniture (eg tables), by race/Hispanic origin, March-April 2014

Figure 110: Approach to polishing furniture (eg tables), by time spent cleaning the house, March-April 2014

Approach to vacuuming fabrics/upholstery

Figure 111: Approach to vacuuming fabrics/upholstery, by gender and age, March-April 2014

Figure 112: Approach to vacuuming fabrics/upholstery, by household income, March-April 2014

Figure 113: Approach to vacuuming fabrics/upholstery, by household size, March-April 2014

Figure 114: Approach to vacuuming fabrics/upholstery, by race/Hispanic origin, March-April 2014

Figure 115: Approach to vacuuming fabrics/upholstery, by household care segments, March-April 2014

Approach to spot cleaning fabrics/upholstery

Figure 116: Approach to spot cleaning fabrics/upholstery, by gender and age, March-April 2014

Figure 117: Approach to spot cleaning fabrics/upholstery, by household income, March-April 2014

Figure 118: Approach to spot cleaning fabrics/upholstery, by household size, March-April 2014

Figure 119: Approach to spot cleaning fabrics/upholstery, by household care segments, March-April 2014

Figure 120: Approach to spot cleaning fabrics/upholstery, by time spent cleaning the house, March-April 2014

Approach to shampooing fabrics/upholstery

Figure 121: Approach to shampooing fabrics/upholstery, by gender and age, March-April 2014

Figure 122: Approach to shampooing fabrics/upholstery, by household income, March-April 2014

Figure 123: Approach to shampooing fabrics/upholstery, by household size, March-April 2014

Figure 124: Approach to shampooing fabrics/upholstery, by race/Hispanic origin, March-April 2014

Figure 125: Approach to shampooing fabrics/upholstery, by time spent cleaning the house, March-April 2014

Approach to windows

Figure 126: Approach to windows, by household care segments, March-April 2014

Figure 127: Approach to windows, by household income, March-April 2014

Figure 128: Approach to windows, by household size, March-April 2014

Figure 129: Approach to windows, by race/Hispanic origin, March-April 2014

Figure 130: Approach to windows, by time spent cleaning the house, March-April 2014

Cues for having cleaned enough, the kitchen

Figure 131: Cues for having cleaned enough, the kitchen, by gender and age, March-April 2014

Figure 132: Cues for having cleaned enough, the kitchen, by household income, March-April 2014

Figure 133: Cues for having cleaned enough, the kitchen, by household size, March-April 2014

Figure 134: Cues for having cleaned enough, the kitchen, by race/Hispanic origin, March-April 2014

Figure 135: Cues for having cleaned enough, the kitchen, by time spent cleaning the house, March-April 2014

Cues for having cleaned enough, bathroom

**BUY THIS
REPORT NOW**

VISIT: 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

Cleaning the House - US - June 2014

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 136: Cues for having cleaned enough, bathroom, by gender and age, March-April 2014

Figure 137: Cues for having cleaned enough, bathroom, by household income, March-April 2014

Figure 138: Cues for having cleaned enough, bathroom, by household size, March-April 2014

Figure 139: Cues for having cleaned enough, bathroom, by race/Hispanic origin, March-April 2014

Figure 140: Cues for having cleaned enough, bathroom, by time spent cleaning the house, March-April 2014

Cues for having cleaned enough, bedroom

Figure 141: Cues for having cleaned enough, bedroom, by gender and age, March-April 2014

Figure 142: Cues for having cleaned enough, bedroom, by household income, March-April 2014

Figure 143: Cues for having cleaned enough, bedroom, by household size, March-April 2014

Figure 144: Cues for having cleaned enough, bedroom, by race/Hispanic origin, March-April 2014

Figure 145: Cues for having cleaned enough, bedroom, by time spent cleaning the house, March-April 2014

Cues for having cleaned enough, living room/family room

Figure 146: Cues for having cleaned enough, living room/family room, by gender and age, March-April 2014

Figure 147: Cues for having cleaned enough, living room/family room, by household income, March-April 2014

Figure 148: Cues for having cleaned enough, living room/family room, by household size, March-April 2014

Figure 149: Cues for having cleaned enough, living room/family room, by race/Hispanic origin, March-April 2014

Figure 150: Cues for having cleaned enough, living room/family room, by time spent cleaning the house, March-April 2014

Appendix – Trade Associations

BUY THIS
REPORT NOW

VISIT: 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