

Air Treatment - US - January 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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"Household penetration of air treatment devices has experienced minimal fluctuation over recent years, showing signs of a stable market. There are some non-owners of these products who report interest in owning, however a larger percentage of non-owners are not interested, primarily due to lack of need."

- Jana Vyleta, Health & Personal Care Analyst

This report looks at the following areas:

- Lack of need is biggest barrier for non-owners and non-users
- Some not interested in category despite usage drivers

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DID YOU KNOW?

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

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Minimal fluctuations in household penetration for all segments

Hurricanes, rising temperatures, urbanization impact market

Consumer confidence will foster category growth potential

Market Snapshot

Industry remains stable

Figure 7: Total ownership of any air treatment devices (net) among US households, 2007-17

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Market Breakdown

Space heater purchases decline slightly when temps rise

Air conditioner purchases rise following record high temps

Humidifier purchases remain steady

Slowing home ownership, urbanization hinders dehumidifier demand

Air purifiers have greatest opportunity for growth

Figure 9: Percentage of US households who own air treatment devices, by segment, 2007-17

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Figure 10: Percentage of US households who purchased air treatment devices within the last 12 months, by segment, 2012-17

Market Perspective

- Recent hurricanes, fires could prompt demand for air treatment
- Rising temperatures evident in air conditioner purchase trends
- Urbanization bodes well for some air treatment sellers

Market Factors

- Consumer confidence fosters growth potential
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- Email marketing tactics, product design appeals to consumers
- Lack of wellness positioning hinders product perceptions
- Increased portability, functional uses could grow category

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- Email marketing tactics aim to educate, drive awareness
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- Air treatment products become visually appealing

What's Struggling?

- Some consumers fail to link air treatment devices with wellness
- Minimal adoption of air purifiers despite benefits
- Safety issues, energy inefficiencies with space heaters

What's Next?

- Smart features that save energy could be poised for success
- Wider penetration possible for air treatment devices
- Greater portability could promote new uses, limit effects of street pollution
- Multi-purpose functionality could make air treatment devices more appealing, useful

The Consumer – What You Need to Know

- More than half of adults own an air treatment device
- Lack of need is biggest barrier to ownership, usage

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Allergies, dry air present a need for air treatment products
Price, functionality factors influence purchase decisions
Positioning products as wellness tools could be worthwhile
One in four adults are looking for ways to improve air quality

Product Usage and Ownership

Ownership, use of air treatment devices is widespread

Opportunity to capture interested non-owners...

...however, some non-owners remain uninterested

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Price dominates purchase decisions for air treatment products

Functional components more important than aesthetics

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