

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and the household care ecommerce market
- Competitive strategies related to household care ecommerce
- · Consumer shopping habits online and in-store
- Consumer attitudes toward household care ecommerce
- Interest in ecommerce innovations

Next to food, household care is the category where consumers have most prioritized spending since the onset of the COVID-19 pandemic. Cleaning is a way of preventing disease-causing germs, but in a world that's increasingly uncertain, caring for the home is one of the few spheres of life where consumers still have a semblance of control. When we consider these trends in tandem with the unprecedented growth of ecommerce as the safer retail channel, household care products will see robust sales growth online. Changes in consumer purchase behavior have reached a milestone, where 66% of consumers have increased their purchase of household products online compared to 2019.



"For years, ecommerce has been the retail sector's growth engine. Online retailers have significantly outpaced their brick and mortar peers, and the COVID-19 pandemic has further accelerated that growth disparity."

Jamie Rosenberg, Senior
 Global Household Analyst

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	s +1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

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
- · Key issues covered in this Report
- Definition
- COVID-19: Market context

EXECUTIVE SUMMARY

- Top takeaways
- Impact of COVID-19 on household care eCommerce

Figure 1: Short-, medium- and long-term impact of COVID-19 on household ecommerce, August 2020

- Opportunities and Challenges
- A historic migration to online retail

Figure 2: Change in online shopping for household products, June 2019 and June 2020

 There's an opportunity to attract more seniors to eCommerce

Figure 3: Buy online more often because of COVID-19 concerns, by age, June 2020

- A blurring of the lines between big and small
- Purely online brands will gain exposure
- A packaging renaissance will make household products more shippable
- Shipping costs are still a barrier
- Reaching full eCommerce potential means closing the digital divide
- Brick & amp; mortar private labels have opportunity online

THE MARKET - KEY TAKEAWAYS

- The impact of COVID-19 on household eCommerce
- eCommerce will outgrow retail
- Policy shifts will close the digital divide

IMPACT OF COVID-19 ON HOUSEHOLD ECOMMERCE

Figure 4: Short-, medium- and long-term impact of COVID-19 on household ecommerce, August 2020

- Lockdown
- Reemergence
- Recovery
- COVID-19: US context

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	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

Report Price: £3695 | \$4995 | €4400

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



MARKET FACTORS

Extraordinary economic pain

Figure 5: Unemployment, January 2007-June 2020

Figure 6: Financial health, by household income, July 15-July

22, 2020

Figure 7: Spending habits – higher priority, July 15–July 22,

2020

eCommerce will outgrow retail

Figure 8: Total US retail ecommerce sales and forecast, at current prices, 2015–25

· Policy shifts will close the digital divide

MARKET OPPORTUNITIES

- Keep the momentum
- · Prepare for a new era of voice-driven shopping

COMPANIES AND BRANDS - KEY TAKEAWAYS

- Packaging innovations align with growing eCommerce demand
- Big manufacturers explore DTC
- Walmart looks to challenge Amazon Prime
- Private labels have online growth potential
- Purpose-driven eCommerce gets a boost

COMPETITIVE STRATEGIES

- Packaging innovations align with growing eCommerce demand
- DTC models and packaging offer areas of innovation

Figure 9: Truman's cartridge-based spray cleaner systems and laundry pods

Figure 10: Amazon's Clean Revolution surface cleaner

Figure 11: Percentage of shopping done online, pre-COVID and during COVID, June 2020

- Big manufacturers explore DTC
- Clorox focuses on in-house DTC development
 Figure 12: Clorox Objective supplement brand
- P&G and SC Johnson are well positioned
- Mass merchandisers also push into DTC

Figure 13: Driving factors for in-store DTC visits, by age, November 2019

Beyond DTC, private labels have online growth potential

Figure 14: Multi-outlet percent growth of household surface cleaners, by leading companies, rolling 52 weeks 2019

Walmart looks to challenge Amazon Prime

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

Report Price: £3695 | \$4995 | €4400

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



Figure 15: Online retailers for household products, June 2020

Purpose-driven ecommerce gets a boost

Figure 16: Screen capture showing Unilever's COVID-19 relief efforts

Figure 17: Lysol Facebook video demonstrating how germs are spread

THE CONSUMER - KEY TAKEAWAYS

- Trial of eCommerce leads to repeat purchases
- · Brands should use safety to entice seniors online
- COVID-19 will reshape long-term shopping behaviors
- Consumers shop their consciences in a crisis
- · Income still determines who shops online
- The pandemic has created more "entry level" eCommerce shoppers

ONLINE SHOPPING FREQUENCY AND INTEREST IN ECOMMERCE

 Household products have become part of consumers' lifestyle strategy

Figure 18: Spending habits – higher priority, June 25-July 7, 2020

 Consumers already buying online show a marked shift in channel preference

Figure 19: Household product shopping habits by channel, June 2019 and June 2020

 Age and income are primary determinants for online shopping

Figure 20: Purchase of household products by channel, by age and income, June 2020

Paper is the top category for home delivery

Figure 21: Purchase of household products by channel, by product category, June 2020

Trial of eCommerce leads to repeat purchases

Figure 22: Trial and interest in shopping online among instore shoppers, June 2020

Brands should use safety to entice seniors online

Figure 23: Trial and interest in shopping online among instore shoppers, by age, June 2020

INFLUENCE OF COVID-19

COVID-19 will reshape long-term shopping behaviors

Figure 24: Changes in shopping behavior due to COVID-19, June 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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



Consumers shop their consciences in a crisis

Figure 25: Interest in buying household brands that support coronavirus relief efforts, by generation, June 2020

Even big brands can help by thinking small and local

Figure 26: Mentions of #supportsmallbusiness and #shoplocal on Instagram and Twitter, March 1-June 18, 2020

ONLINE CHANNELS SHOPPED

Amazon is biggest and growing the fastest

Figure 27: Online retailers shopped for household products, June 2020

CHANGES IN ONLINE SHOPPING

A historic jump to eCommerce

Figure 28: Change in online shopping for household products – 2019 vs 2020, June 2019 and June 2020

Income still determines who shops online

Figure 29: Purchase household products online – more often, by age and income, June 2020

 The pandemic has created more "entry level" eCommerce shoppers

Figure 30: Purchase household products online – more often, by online shopping status, June 2020

REASONS FOR SHOPPING ONLINE MORE OFTEN

Safety has become the top eCommerce driver

Figure 31: Reasons for buying more household products online, June 2020

 Higher-income consumers are most likely to cite reduced shipping costs

Figure 32: Increased online shopping because shipping has become less costly, by household income, June 2020

COVID-19 drives older consumers online

Figure 33: Buy online more often because of COVID-19 concerns, by age, June 2020

ATTITUDES AND BEHAVIORS TOWARD SHOPPING ONLINE

Improve the online shopping experience

Figure 34: Attitudes toward buying household care products online, June 2020

A minority are willing to pay shipping costs

Figure 35: Willingness to pay more for home delivery, by age and income, June 2020

Parents are most willing to pay delivery fees

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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



Figure 36: Willingness to pay more for home delivery, by age of child, June 2020

Online retailers make shopping lists easier
 Figure 37: Most common behaviors when shopping in-store vs

online, June 2020

Consumers increase use of a Commerce to stock up

 Consumers increase use of eCommerce to stock up Figure 38: Stock-up and fill-in shopping behaviors, by channel, by age, June 2020

FACTORS TO ENCOURAGE MORE ONLINE SHOPPING

Cost and convenience are king

Figure 39: Factors that would increase online shopping, June 2020

Younger consumers want convenience benefits

Figure 40: Convenience factors that would increase online shopping, by generation, June 2020

Figure 41: Factors that would increase online shopping, by channel, June 2020

INTEREST IN INNOVATIONS

- The internet remembers, and that can be a good thing Figure 42: Interest in ecommerce innovations, June 2020
- New innovations should be targeted toward seniors
 Figure 43: Interest in ecommerce innovations any agree, by generation, June 2020
- Parents are the most enthusiastic about convenience
 Figure 44: Interest in ecommerce innovations any agree, by age of child, June 2020

APPENDIX - DATA SOURCES AND ABBREVIATIONS

- Data sources
- Consumer survey data
- Abbreviations and terms
- Abbreviations

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.