

This report looks at the following areas:

- The impact of COVID-19 on Black consumers and their approach to spending on household cleaning products
- Which cleaning products are most critical for Black consumers and how their usage compares to the general market and the categories that command more brand loyalty
- What product attributes Black consumers look for when shopping for household cleaning products
- How cleaning product brands can meet Black consumers' needs and what messages resonate most

Like all consumers, Black consumers are concerned with COVID-19 and are responding by taking control of what they can – the health and safety of their households. While the pandemic continues to threaten health and personal finances, Black consumers' approach to cleaning their homes will include a greater focus on prevention and protection along with reactive and routine cleaning. Trusted name brands for the most critical cleaning activities where germ-killing and disinfecting are important will remain the preferred option. However, the COVID-19 recession will also create more opportunity for private label products and less-familiar brands to make it into this shopper's basket if they can convince consumers that performance is comparable at a lower price.



"Even before COVID-19
impacted consumers' lives
and elevated the importance
of cleanliness, Black
consumers showed a
tendency to use more
household care products."
- Fiona O'Donnell, Director
US Reports – Multicultural

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
- Scope
- COVID-19: market context
- Economic and other assumptions

EXECUTIVE SUMMARY

- Top takeaways
- Market overview
- COVID-19 concerns drive the market up, Black consumers increase share of spending

Figure 1: Black consumer spending on household cleaning and percentage of total, at current prices, 2015–20

- Consumer overview
- Four segments present different opportunities for household cleaning brands

Figure 2: Black consumer household cleaning segments, March 2020

 Impact of COVID-19 on Black consumers and household cleaning

Figure 3: Increased use of disinfectants/household cleaning products due to COVID-19, by Black/all/White and gender, April 10-16, 2020

Figure 4: Short, medium and long-term impact of COVID-19 on household cleaning and Black consumers, October 2020

- Opportunities and challenges
- Promote online shopping with an emphasis on ease and prevention
- A focus on value may prompt trading down to lower-priced products
- Black households use a wider variety of cleaning products
 Figure 5: Number of household cleaning products used, by all and Black consumers, April 2019-June 2020
- Potential for products to claim effectiveness against COVID-19

Figure 6: Top cleaning product attributes important to Black consumers, March 2020

· Tap into an underserved market – single Black men

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 7: Sole responsibility for household cleaning and shopping, by Black/White and gender, March 2020 and January 2020

THE MARKET - KEY TAKEAWAYS

- Black consumers increasing their share of spend on household cleaning
- eCommerce is niche but growing

BLACK CONSUMERS BY THE NUMBERS

 Black consumers account for about 13% of total population or 44.7 million

Figure 8: US population – Number and share, by Black vs non-Black, 2015–25

Figure 9: US population – Generation distribution, by Black vs total, 2020

 About one third of Black households are low income, but middle-income households are nearly on par with the average

Figure 10: Household income, by race and Hispanic origin, 2018

- Household structure impacts cleaning needs
- Black adults are more likely to live alone

Figure 11: Household size, by race and Hispanic origin, 2019

 Same number of adults, but more children in Black households

Figure 12: Average number of people per family household, by race/Hispanic origin, 2019

More diversity in living arrangements

Figure 13: Household type, by race/Hispanic origin, 2019

BLACK CONSUMERS AND HOUSEHOLD CLEANING – MARKET SIZE ESTIMATE

 COVID-19 concerns boost the household cleaning market overall

Figure 14: Total spending on household cleaning, at current prices, 2015-25

Figure 15: Key drivers affecting Mintel's total market household cleaning forecast, 2019–25 (updated July 31, 2020)

Black consumer spending spikes

current prices, and annual change, 2015-20

Figure 16: Black consumer spending on household cleaning and percentage of total, at current prices, 2015-20 Figure 17: Black consumer spending on household cleaning, at

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.



Impact of COVID-19 on Black consumers and household cleaning

Figure 18: Lifestyle changes due to coronavirus outbreak, by total, Black total and gender, April 10-16, 2020
Figure 19: Short, medium and long-term impact of COVID-19 on household cleaning and Black consumers, October 2020

- Lockdown
- · Re-emergence
- Recovery
- Learnings from the last recession

Figure 20: Consumer spending on household cleaning and paper products, annual, 2000-19 and Q1 2020

MARKET SHARE

 Black households spend a greater share of household budget on laundry and cleaning supplies

Figure 21: US housekeeping supplies expenditures, by race, 2019

MARKET FACTORS

The Black population is more vulnerable to COVID-19

Figure 22: Difference between COVID-19 and unweighted/ weighted* population, by race and Hispanic origin, September 2020

 Black consumers' homeownership is lower, impacts household appliance ownership

Figure 23: Homeownership rate, by race and Hispanic origin, 2008-18

· Less square footage means less to clean

Figure 24: US number of bedrooms and bathrooms* in all occupied units, by race, 2019

Drop in unemployment, reduced financial relief show mixed economic reality

Figure 25: Total and Black labor force participation and unemployment, January 2010–September 2020

MARKET OPPORTUNITIES

Highlight convenience and safety of ecommerce
 Figure 26: Walmart+ membership, September 2020

 Don't forget the dollar stores – particularly for laundry and aircare

Figure 27: Retailers shopped in past six months for surface cleaners, by race and Hispanic origin, May 2020

Relate to your audience

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 28: Pine-Sol Deeper than Clean, September 2020

Potential to call out COVID-19

Figure 29: Household cleaners – International – COVID-19 claims, August-September 2020

COMPANIES AND BRANDS - KEY TAKEAWAYS

- When safety is at stake, two brands make it their priority to drive trust
- Green only goes so far
- Black consumers' brand preferences vary by category

COMPETITIVE STRATEGIES

- Top brands expand influence with strategic partnerships for public spaces
- Clorox partnerships
- Lysol partnerships
- Consumer impact
- P&G addresses racial inequality
- "Green" garners general market appeal, Black consumers are less likely to be convinced

Figure 30: Natural/eco-friendly cleaning products

Private label turns up the pressure

Figure 31: Private label competitors in household care

Amazon offers stiffer competition

Figure 32: Amazon.com private label homecare products

PRODUCT CATEGORIES AND BRANDS

 Black consumers use a greater variety of household cleaning products

Figure 33: Number of household cleaning products used, by

all and Black consumers, April 2019-June 2020

Figure 34: Household use of cleaning products – Product types, by all and Black consumers, April 2019–June 2020

Dishwashing products

Figure 35: Household use of dishwashing products, by all and Black consumers, April 2019-June 2020

Companies and brands

Figure 36: Brands most often – Dishwashing liquid, by all and Black consumers, April 2019-June 2020

Figure 37: Brands most often – Automatic dishwashing detergent, by all and Black consumers, April 2019-June 2020

Deodorizers and floor cleaners

Figure 38: Household use of floor cleaners/room deodorizers, by all and Black consumers, April 2019-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.



Figure 39: Flooring in the home, by room, by all and Black/ White consumers, March 2020

Companies and brands

Figure 40: Brands most often – Floor wax or polish, by all and Black consumers, April 2019–June 2020

Figure 41: Brands most often – Air freshener sprays/room deodorizer, by all and Black consumers, April 2019–June 2020 Figure 42: Brands most often – Fabric/carpet deodorizers/ fresheners, by all and Black consumers, April 2019–June 2020

Kitchen and bathroom cleaners

Figure 43: Household use of kitchen/bathroom cleaners, by all and Black consumers, April 2019–June 2020
Figure 44: Brands most often – In-tank toilet cleaners, by all and Black consumers, April 2019–June 2020

Laundry products

Figure 45: Household use of laundry products, by all and Black consumers, April 2019-June 2020

Figure 46: Brands most often – Laundry soaps/detergent

Figure 46: Brands most often – Laundry soaps/detergents, by all and Black consumers, April 2019-June 2020

Figure 47: Types most often and also – Laundry soaps/detergents, by all and Black consumers, April 2019–June 2020 Figure 48: Brands most often – Bleach (for laundry), by all and Black consumers, April 2019–June 2020

THE CONSUMER - KEY TAKEAWAYS

- Varying attitudes toward cleaning results in different priorities and approaches
- Household cleanliness is a high priority
- Multipurpose is a must, demonstrates that convenience remains a consideration
- Natural and sustainable are nice, performance is critical
- With a focus on health, a clean home takes on greater meaning

THE BLACK CONSUMER: HOUSEHOLD CLEANING SEGMENTS

Four segments of Black adults who clean present different opportunities

Figure 49: Black consumer household cleaning segments, February 2018 and March 2020

- Basic Cleaners just want to get the job done
 Figure 50: Profile of Basic Cleaners segment, March 2020
- Green Cleaners invest in safe sanitation
 Figure 51: Profile of Green Cleaners segment, March 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.



Stringent Cleaners take homecare personally
 Figure 52: Profile of Stringent Cleaners segment, March 2020

• For Easy Cleaners, it's (almost) all about the money Figure 53: Profile of Easy Cleaners, March 2020

HOUSEHOLD CLEANING AND SHOPPING RESPONSIBILITY

 Nearly all Black consumers clean their homes and shop for products

Figure 54: Household cleaning responsibilities, by Black/all/ White and gender, March 2020 and January 2020 Figure 55: Household cleaning product shopping responsibilities, by Black/all/White and gender, March 2020 and January 2020

Prioritize Green Cleaners and Stringent Cleaners
 Figure 56: Household cleaning responsibilities, by Black consumer cleaning segments, March 2020

Walmart's selection and low prices makes it the top retailer
 Figure 57: Black consumers' preferred grocery shopping
 locations, October 2019

CHANGE IN CLEANING FREQUENCY

 Black women are putting a higher priority on cleaning due to COVID-19

Figure 58: Higher spending priority for household care products, by Black and White women, April-September 2020

 Anticipate increased time and energy dedicated to the home

Figure 59: Cleaning frequency compared to a year ago, by Black/all/White and gender, March 2020 and January 2020 Figure 60: Average hours per day engaged in household activities (including travel), by Black/all/White and gender, 2003-19

Green Cleaners are most likely to increase their cleaning frequency

Figure 61: Cleaning frequency compared to a year ago, by Black consumer cleaning segments, March 2020

REASONS FOR CLEANING MORE FREQUENTLY

Disinfecting is more important than appearances

Figure 62: Black consumers' reasons for cleaning more often, March 2020

Figure 63: Increased use of disinfectants/household cleaning products due to COVID-19, by Black/all/White and gender, April 10-16, 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.



Cleaning isn't always a thankless chore

Figure 64: Reasons for cleaning more often – Women, by Black/White and indexed to all, March 2020 and January 2020

Cleaning segments have different motivations for increased cleaning

Figure 65: Cleaning frequency compared to a year ago, by Green Cleaners segment, March 2020

Figure 66: Cleaning frequency compared to a year ago, by Stringent Cleaners segment, March 2020

IMPORTANT CLEANING PRODUCT ATTRIBUTES

Functional attributes are at the forefront

Figure 67: Important cleaning product attributes, by Black/ White and indexed to all, March 2020 and January 2020

Brand and natural ingredients gain ground

Figure 68: Cleaning product attributes important to Black consumers, February 2018 and March 2020

TURF shows that secondary attributes can lead to broader appeal

Figure 69: TURF analysis – Cleaning product attributes important to Black consumers, March 2020

Figure 70: Table – TURF analysis – Cleaning product attributes important to Black consumers, March 2020

- TURF methodology
- Across all cleaning segments, fundamentals are first
 Figure 71: Important cleaning product attributes, by Black consumer cleaning segments, March 2020

ATTITUDES AND BEHAVIORS TOWARD CLEANING EQUIPMENT

In the contest between reusability vs sustainability, hygiene wins

Figure 72: Attitudes and behaviors toward cleaning equipment – Women, by Black/White and indexed to all, March 2020 and January 2020

 Middle-aged Black women want the convenience of disposability

Figure 73: Black consumers' attitudes and behaviors toward cleaning equipment – Reusability, by gender and age, March 2020

ATTITUDES TOWARD CLEANING

 Black consumers see their home as a reflection of themselves

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 74: Black consumers' feelings about home, by gender and age, March 2020

 Break the cognitive link that convenience means sacrificing performance

Figure 75: Black consumers' feelings about convenience and cleaning, by gender and age, March 2020

Basic products are good enough as long as they disinfect
 Figure 76: Black consumers' feelings about cleaning product
 performance, by gender, March 2020

 Older Black women need a compelling reason to break their routines

Figure 77: Black women's feelings about cleaning product performance, by age, March 2020

Natural is nice but not necessary

Figure 78: Black consumers' feelings about cleaning product ingredients/health, March 2020

APPENDIX - DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Forecast
- Demographic data
- Consumer survey data
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX - THE MARKET

Figure 79: Black consumer/total spending on household cleaning, at current prices, 2015-20/2015-25

APPENDIX - THE CONSUMER

- Important cleaning product attributes
- TURF methodology

Figure 80: Important cleaning product attributes – Women, by Black/White and indexed to all, March 2020 and January 2020

APPENDIX - MINTEL TREND DRIVERS

Figure 81: Mintel Consumer Trend Drivers and Pillars

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.