“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.

This 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.

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.
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
Cleaning the House - US - June 2013

Market Drivers

Time spent on housework declined just slightly between 2003 and 2011
Figure 13: Time spent daily on housework, hours, 2003-11

Gender gap in housework continues to narrow
Figure 14: Households, by presence of children, 2002-12

Number of households increases, but households with kids declines
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
 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

oxxygen.mintel.com © 2012 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.
Cleaning the House - US - June 2013

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

Vacuuming, 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
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
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
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
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