

The Future of Household Cleaning: Capitalizing On Emerging Trends and Changing Preferences

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Abstracts

Introduction

Datamonitor believes that a 'marketing sweetspot' exists in the development and wider marketing of household care products. Although consumers are clearly heavily influenced by price, the 'sweetspot' is in recognition of the confluence of consumer trends impacting household care choices

Scope

Covers household care, with a particular focus of household cleaning, including category specific market data and per capita expenditures

Detailed analysis on consumer attitudes towards, and perceived influence of, different product features and benefits impacting choice

In-depth action points offering practical strategies based on the trends and insights uncovered in the report

Covers five major geographic territories: North America, Europe, Asia Pacific, MENA and Latin America

Highlights

Two-thirds of consumers globally buy cleaning products on the basis of value-for-money

either 'most' or 'all the time'. Brazilians (79%) and Russians (74%) were most fervent in their self-reported quest for value-for-money. Japanese and Swedish consumers expressed the least propensity to buy on the basis of value

Environmentalism and the move toward sustainability is becoming a meaningful driver of consumer behavior in household care, but is secondary to most purchase influencers

Data extrapolated from Datamonitor's Product Launch Analytics (PLA) database highlights that air fresheners and general purpose cleaners accounted for the highest proportion of new product introductions tracked by Datamonitor's product specialists across the globe in 2008-09

Reasons to Purchase

Develop better targeted products with detailed understanding of the household cleaning needs and preferences of consumers across 17 countries

Access data analysis from two waves of primary consumer research, and best practice examples of innovative and effectively marketed products

Improve your marketing by following best-practice guidelines. Develop action plans using Datamonitor's recommendations as a catalyst for ideation

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THE FUTURE DECODED

INTRODUCTION: Household care comprises laundry and household cleaning, with this report only focusing on the latter

This report is one of two category-focused reports outlining household care trends and preferences

Irrespective of whether consumers like cleaning their houses, it is something that is generally deemed to be highly important

TREND: The most significant growth in household cleaning products is occurring in the emerging markets

Product launch trend data offer some insight about the direction of household cleaning products

General purpose cleaners generally account for the highest share of consumers' household cleaning spend

Air fresheners are well placed to capitalize on the powerful influence of scent on consumers' emotional wellbeing and the fact that people are gravitating towards their homes amid the economic downturn

Bleach spend in many markets is falling amid concerns about formulation and the growing efficacy of general purpose cleaners

Emerging markets will be the main engine of growth for dishwashing products

Key takeouts and implications: emerging markets represent the 'path to growth' in household care

INSIGHT: A preoccupation with health and wellbeing also exerts significant influence on household cleaning attitudes, motivations and preferences

Consumers explicitly recognize the link between good hygiene and wellbeing via a 'feel-good factor' that is obtained from doing the cleaning and/or the results obtained

Consumers are less able to relate to the idea that the act of household cleaning itself is therapeutic

Most consumers are aware of and concerned about the negative health effects of poor home hygiene

Fears over ingredient harshness and safety in household care products are influencing consumer choices, with the halo surrounding natural formulations becoming more apparent

Sensory benefits can also boost the wellbeing factor of household care products

Key takeouts and implications: the industry must strive towards better associating household cleaning products with wellness

INSIGHT: Value for money considerations heavily influence household product choice and the generally favorable perception of private label branded cleaning products

Value-consciousness is a highly pervasive influence of many household care product choices

Private label household cleaning products have increasing credibility with consumers, but the habitual buying of preferred brands is still relatively commonplace

Word-of-mouth recommendations and product samples are also perceived to exert some influence on product choice

Key takeouts and implications: be wary of putting a disproportionate focus on price in responding to consumers' value-consciousness

INSIGHT: Convenience and efficacy heavily influence household cleaning choices due to both an inherent dislike of cleaning and perceived time scarcity

The majority of consumers both dislike household chores and feel constrained by time scarcity

Efficacy and multi-purpose benefits are deemed influential to consumers, but less so than other benefits

Minimizing time spent doing housework is important to consumers, but is not fully reflected in the perceived influence of time-saving product features

Consumers attach more importance to ease of use than ease of storage, but both are highly influential attributes shaping household care preferences

Key takeouts and implications: consumers are looking for ways to minimize time and effort spent on doing their housework, and household care brands must outperform rivals in this critical area

INSIGHT: Ethicality and sustainability is a theme that continues to gain momentum in household care product choices

A notable segment of consumers are deliberately avoiding companies and brands with a poor environmental reputation and are also paying attention to sustainable packaging issues

Ethical and environmental consumerism drives the demand for more 'virtuous formulation' and 'virtuous production'

Key takeouts and implications: environmentalism and the move toward sustainability is becoming a meaningful driver of consumer behavior in household care, but is secondary to most purchase influencers

ACTION POINTS

ACTION: Make performance, ease, ethics, wellbeing and value for money core components of household cleaning brands

ACTION: Help consumers to understand what ingredients are used and why

ACTION: Cater to consumers' desires for more ethical, safer products and processes

ACTION: Offer higher-value, more effective and more convenient solutions to help protect against the pervasive private label threat

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