

Home Care & Fragrance Category Essentials: Fall 2023

Collage Group, Category Essentials Survey, Fielded August 2023

18-77 Unweighted Survey Sample Breakdown, n=4,275

Race/Ethnicity		Gender		Generation	
Hispanic	1127	Woman	2151	Gen Z	564
Black	725	Man	2094	Millennial	1321
Asian	474			Gen X	1149
White	1900			Boomer	1241
Hispanic Acculturation		LGBTQ+			
Acculturated	374	LGBTQ+	535		
Bicultural	457	Non-LGBTQ+	3740		
Unacculturated	296				

Please note that data present in this report is weighted to be nationally representative of Race/Ethnicity, Hispanic Acculturation, Age, Gender, and Sexuality.

Key Takeaways and Action Steps: **Home Care & Fragrance**

Know This

Millennials and Gen Xers are most likely to be the heads of their households and, subsequently, say they do most or all of the cleaning.

Gen Xers seek multipurpose tools to simplify cleaning, while Millennials are more interested in ordering supplies online or through a subscription.

Millennials are driven to try new homecare products that are eco-friendly or luxurious. Eco-friendliness is important for a generation with young kids at home, and using luxurious cleaning products fits with Millennials overall desire to treat themselves with affordable, daily luxuries.

Do This

- **Focus on consumers in their prime cleaning years: Millennials and Gen Xers.** Ease the burden of household cleaning responsibilities for Gen Xers by promoting the power of multipurpose tools. Save Millennials time and effort by promoting online and subscription purchasing options.

- Message to the mindset driving Millennials desire for eco-friendly and luxurious products. **Promote the non-toxic and longevity benefits of eco-friendly products,** and **position luxury cleaning products as affordable mini treats.**



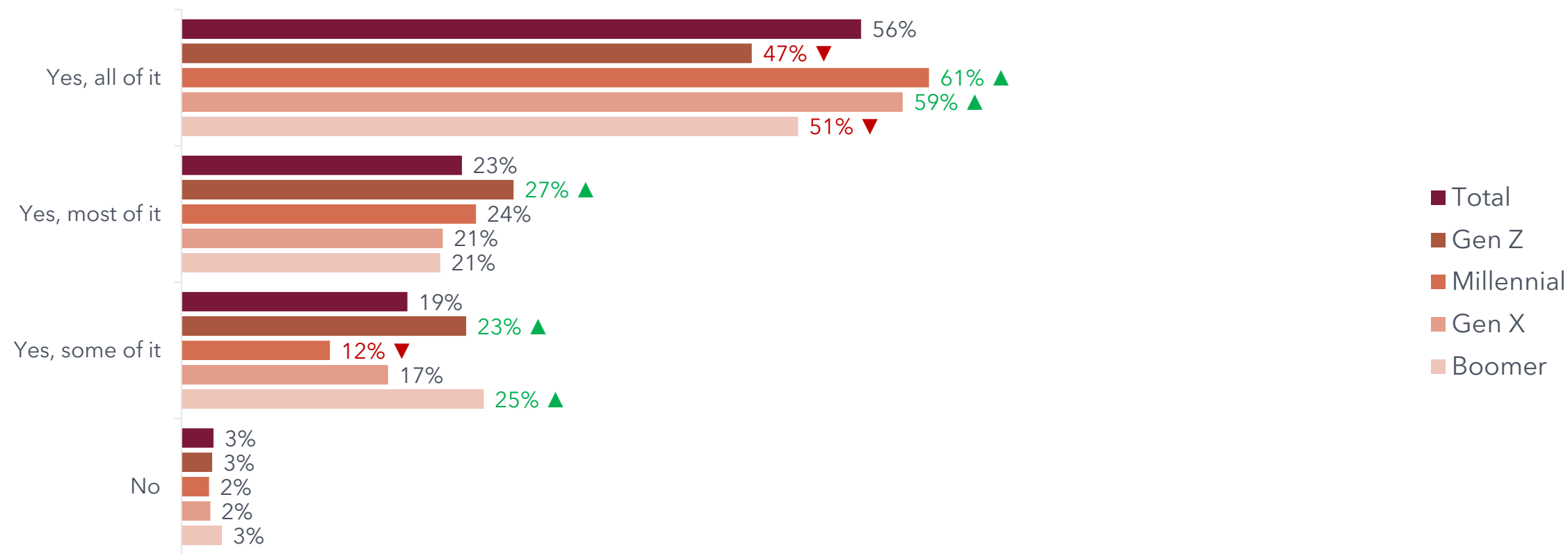
Consumption

Drivers
Category & Product

Shopping
Information Gathering
Price & Promotion
Location

Millennials and Gen Xers Are Most Likely to Be Doing All of the Cleaning in Their Households

Do you do any of the household cleaning in your home (wash dishes, do laundry, clean the bathroom or kitchen, etc.)?

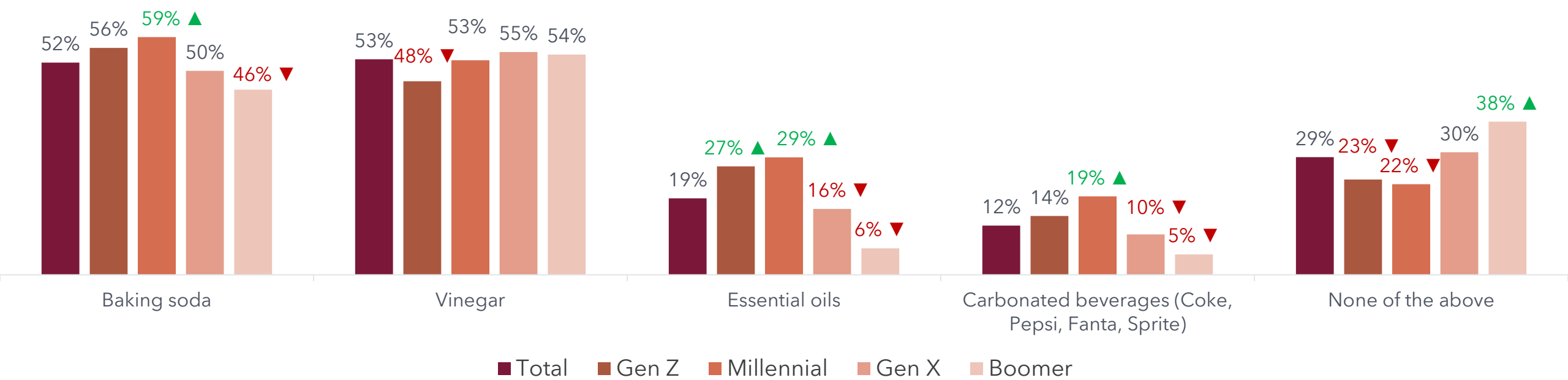


Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Single select
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Millennials Are More Likely than Others to Use Baking Soda, Essential Oils and Carbonated Beverages for Cleaning

About Half of Americans Use Baking Soda or Vinegar

Do you use any of the following for household cleaning purposes?

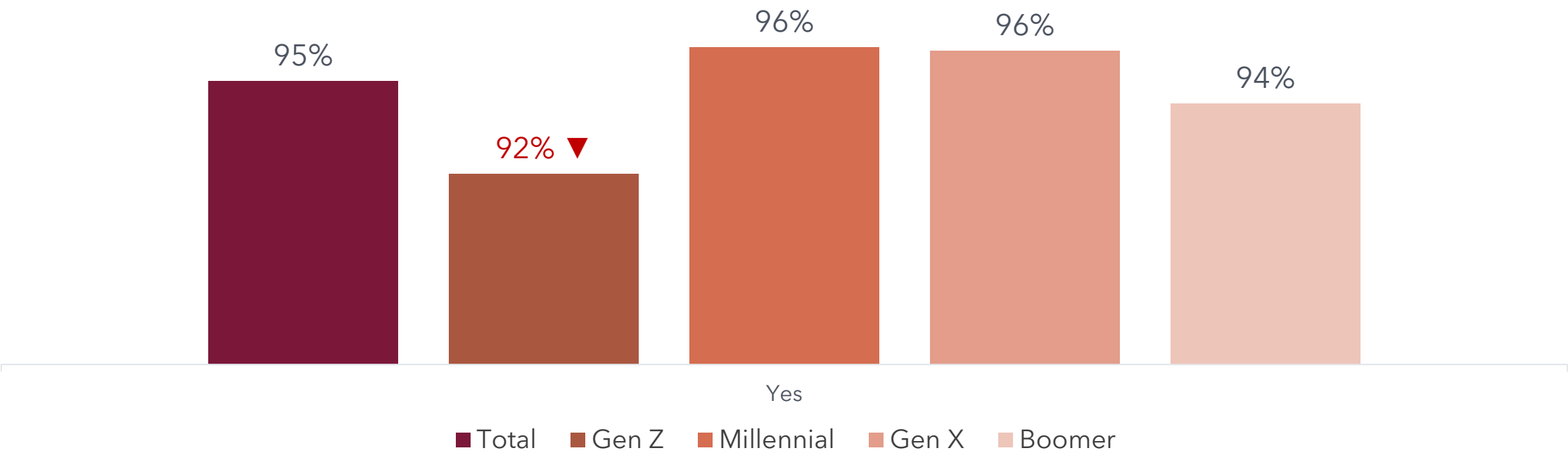


Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Multiselect
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Nearly All American Households Use Multipurpose Cleaners

Gen Z Is Only Slightly Less Likely to Compared to Others

Do you or your household use multipurpose cleaning products (i.e., products that can be used on a variety of different materials such as toilets, sinks, kitchen countertops, stoves, etc.)?

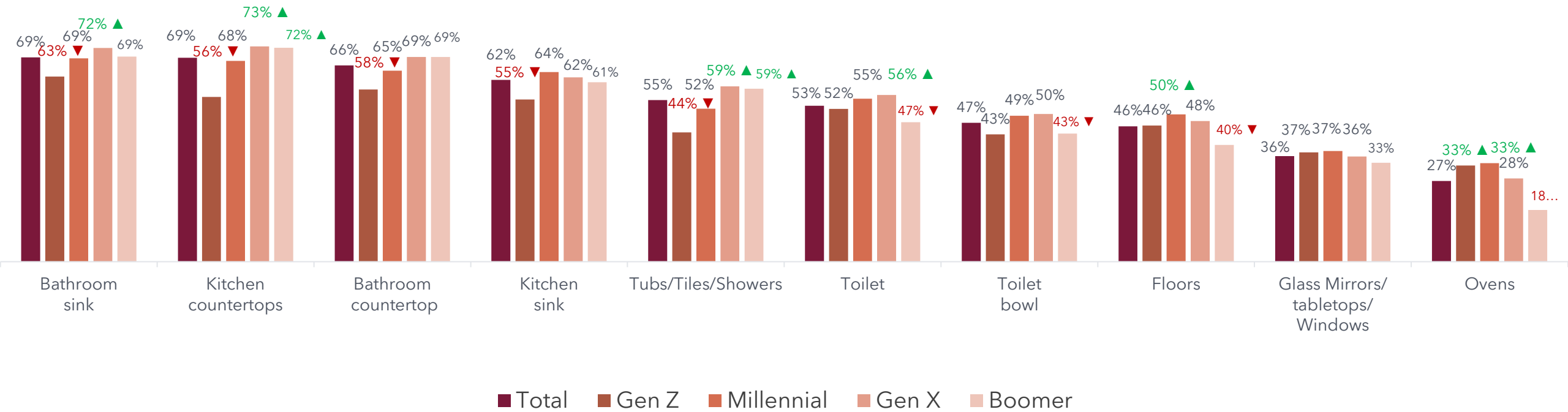


Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Single select, % Yes
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Most Consumers Who Use Multipurpose Cleaners Apply Them to Sinks, Countertops, Bathtubs, and Showers, Especially Gen X

Millennials Over-Index for Using Them for the Floor and Oven

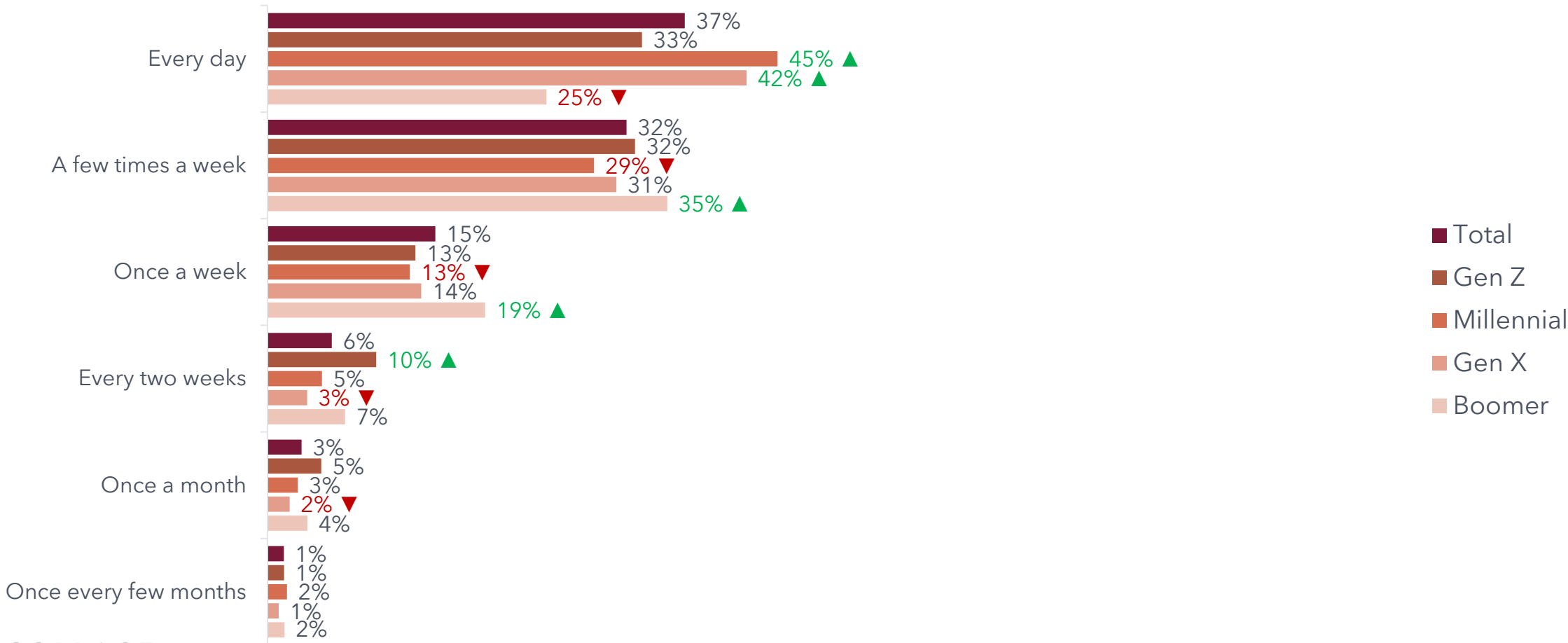
Where do you use a multipurpose cleaner instead of a dedicated cleaner?



Source: Collage Group Category Essentials Fall 2023 (18-77 respondents who use multipurpose cleaner), weighted data
Multiselect
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Cleaning Frequency: **Sweep**

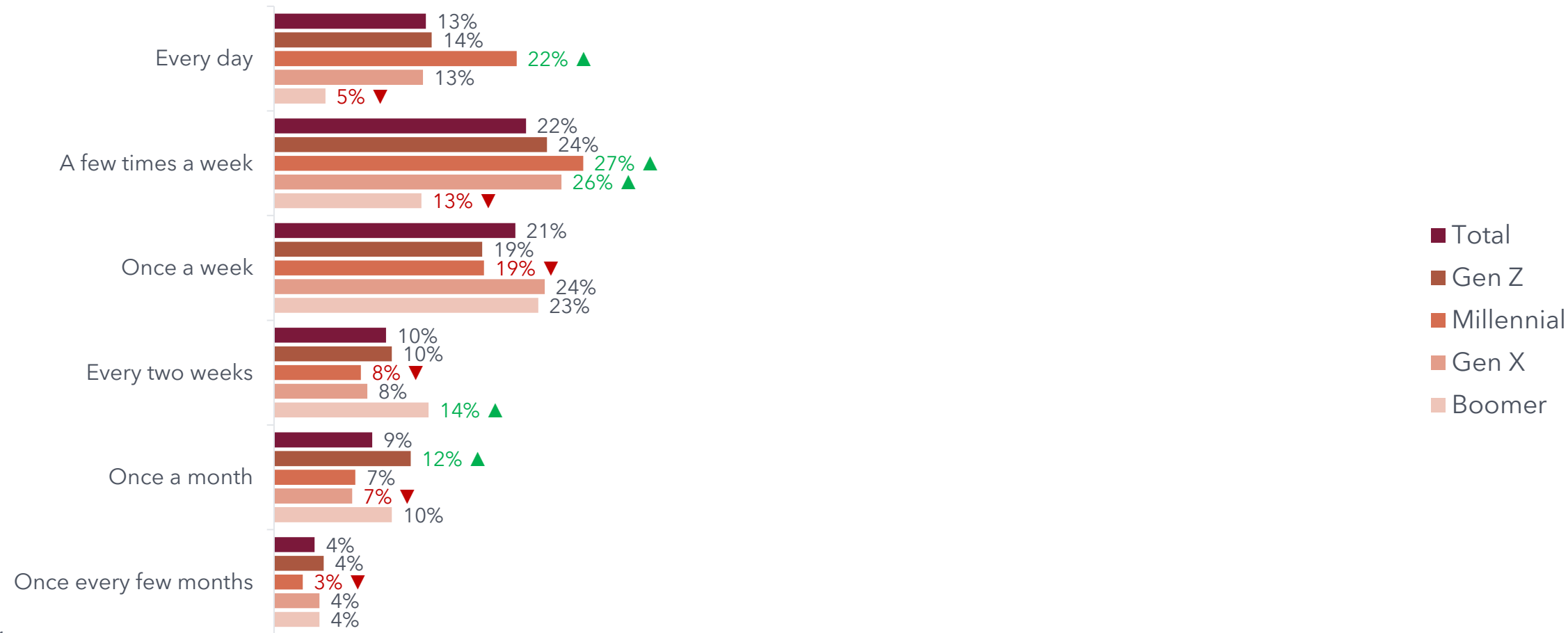
How often do you do the following to clean your floors? **Sweep**



Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Single select
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Cleaning Frequency: **Wet Mops**

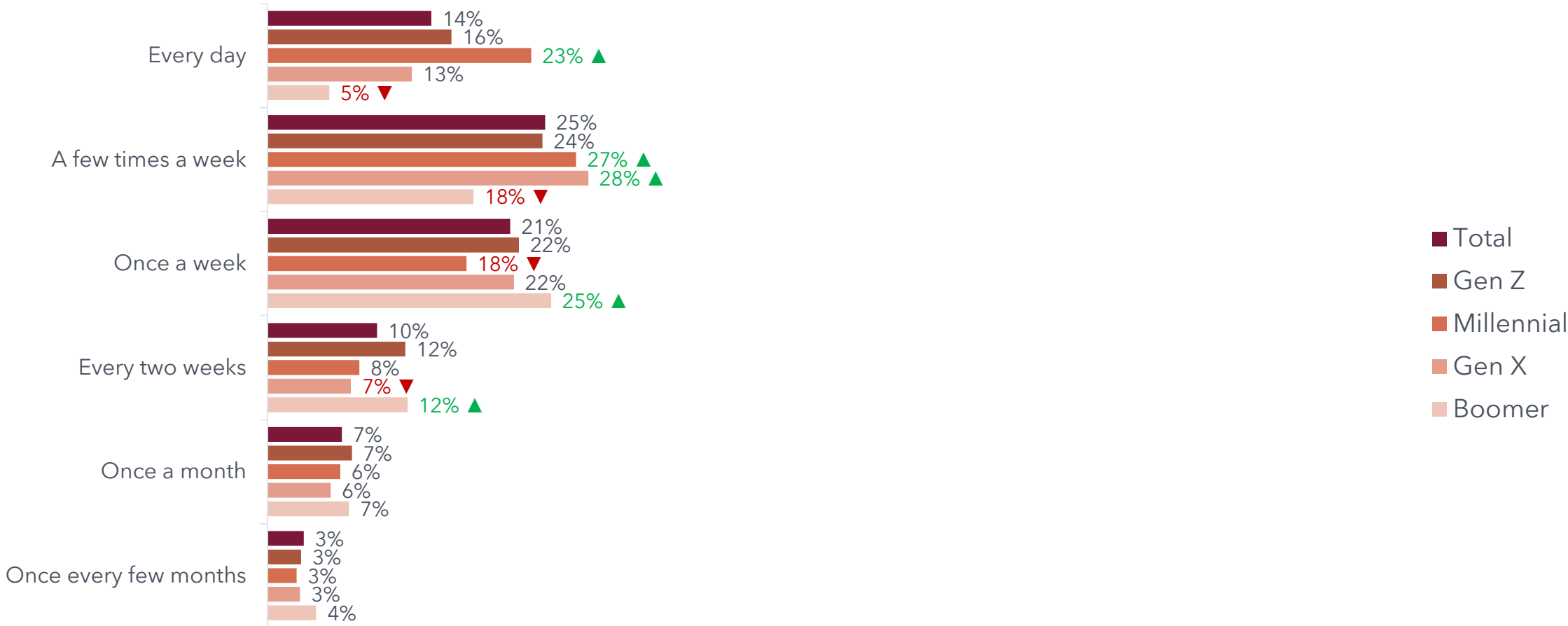
How often do you do the following to clean your floors? **Wet mops (used with a bucket)**



Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Single select
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Cleaning Frequency: **Mop with Disposable Cleaning Pads**

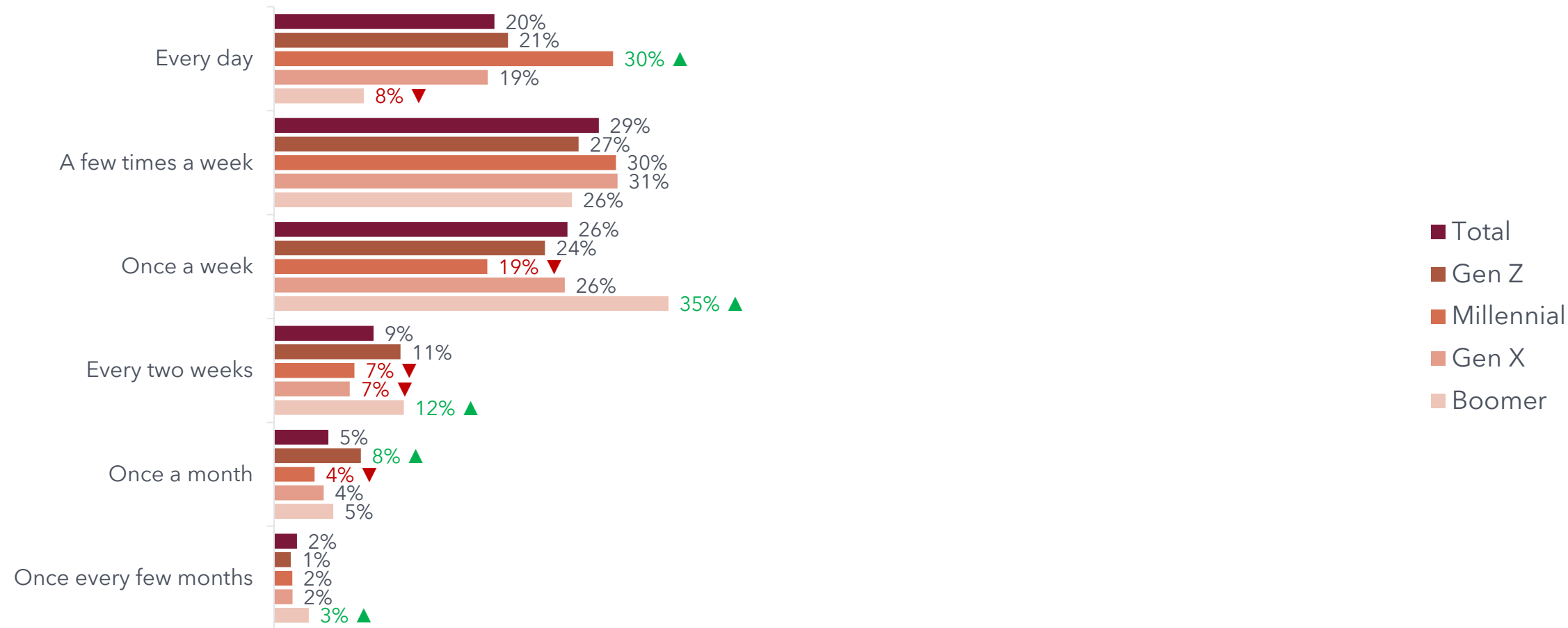
How often do you do the following to clean your floors? **Mop using disposable floor cleaning pads (e.g., Swiffer)**



Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Single select
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Cleaning Frequency: Vacuum

How often do you do the following to clean your floors? Vacuum

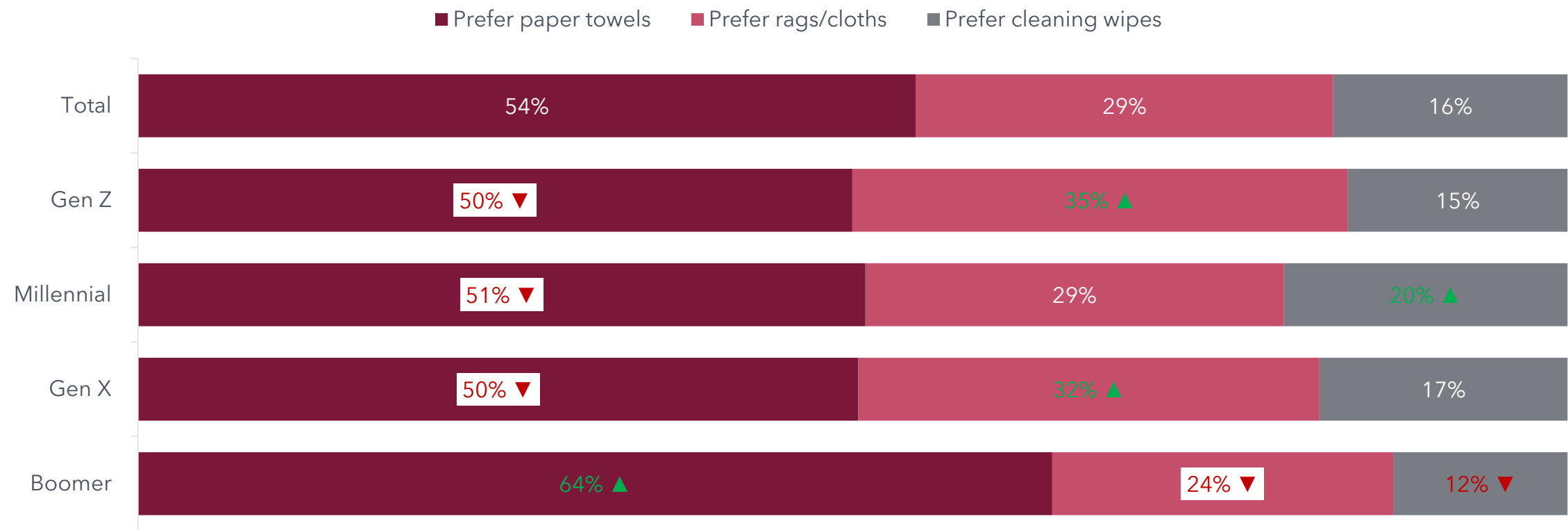


Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Single select
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Over Half of Consumers Use Paper Towels to Clean up Kitchen Messes, Boomers Most of All

Gen Z and Gen X Tend to Be More Partial to Cloth Rags than Others

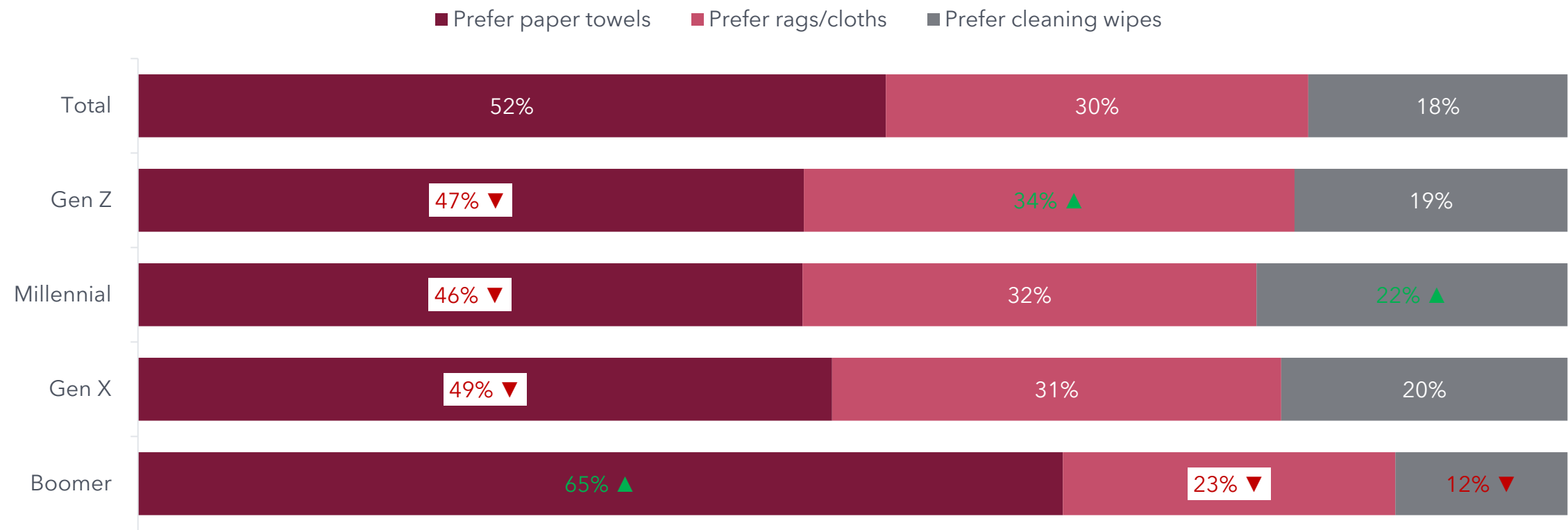
Which do you prefer using in the following situations? **Cleaning messes in the kitchen**



Most Americans, Especially Boomers, Use Paper Towels to Clean Messes off the Floor

A Third of Gen Z Likes to Use Cloth Rags and Millennials Are More Likely than Others to Use Wipes

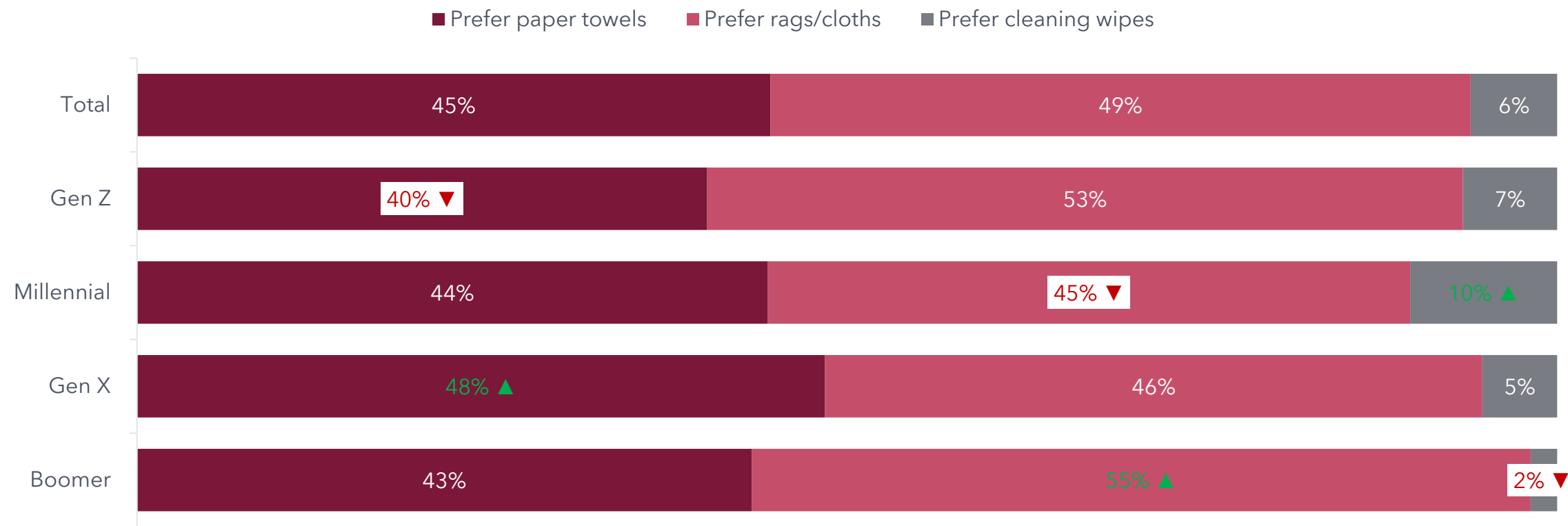
Which do you prefer using in the following situations? **Cleaning messes on the floor**



Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Single select
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Consumers Are Largely Split between Using Paper Towels or Cloths to Dry Their Hands at the Kitchen Sink

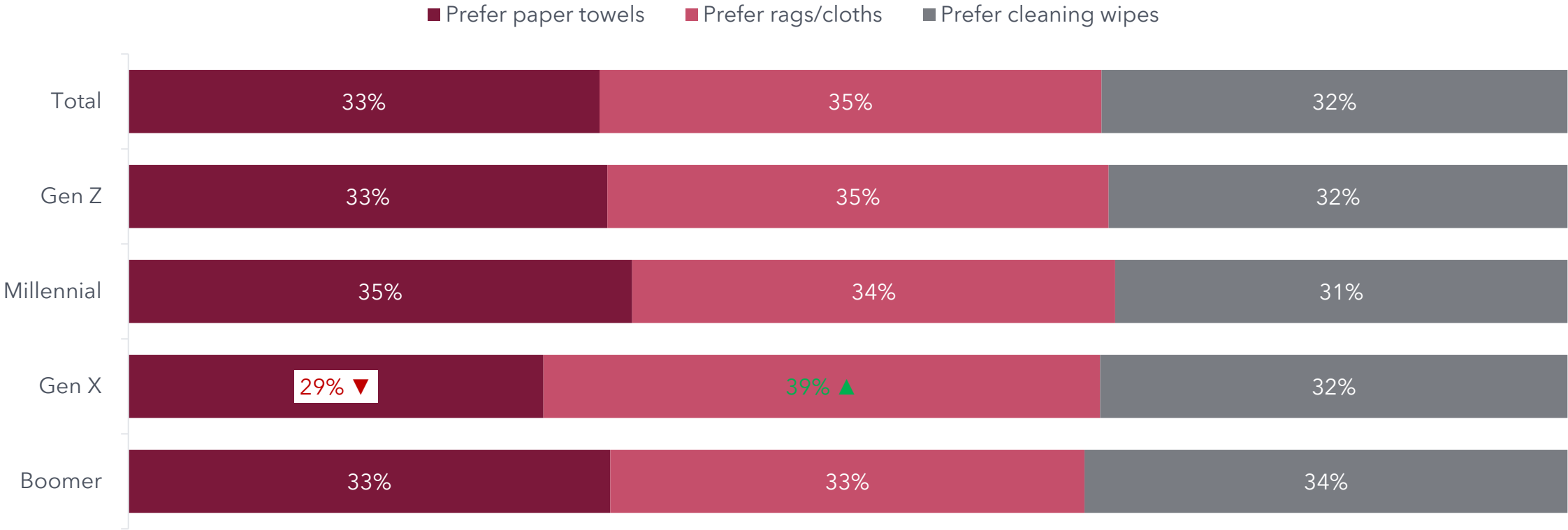
Which do you prefer using in the following situations? **Drying hands at the kitchen sink**



Paper Towels, Cloth Rags, and Cleaning Wipes Are Used about Equally to Clean Bathrooms

Gen Xers Are Slightly More Likely to Prefer Rags

Which do you prefer using in the following situations? **Cleaning in the bathroom**

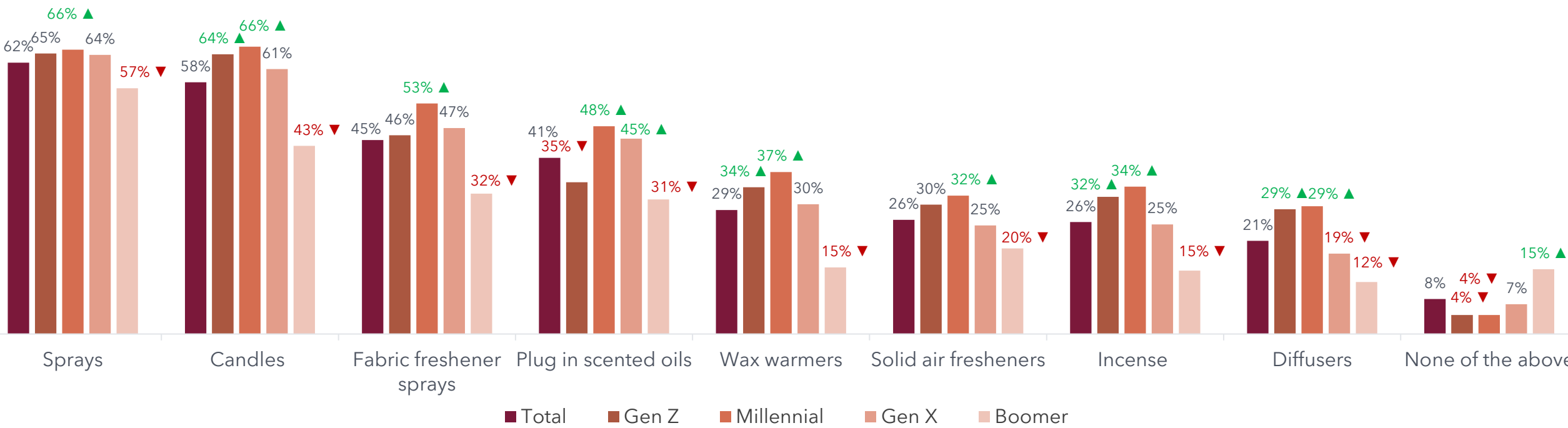


Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Single select
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Sprays and Candles Are the Most Popular Kinds of Air Fresheners, Especially among Younger Gens

Millennials Are Most Likely to Use a Variety of Fresheners while Boomers Use Fewer Overall

Do you use any of the following types of air fresheners?

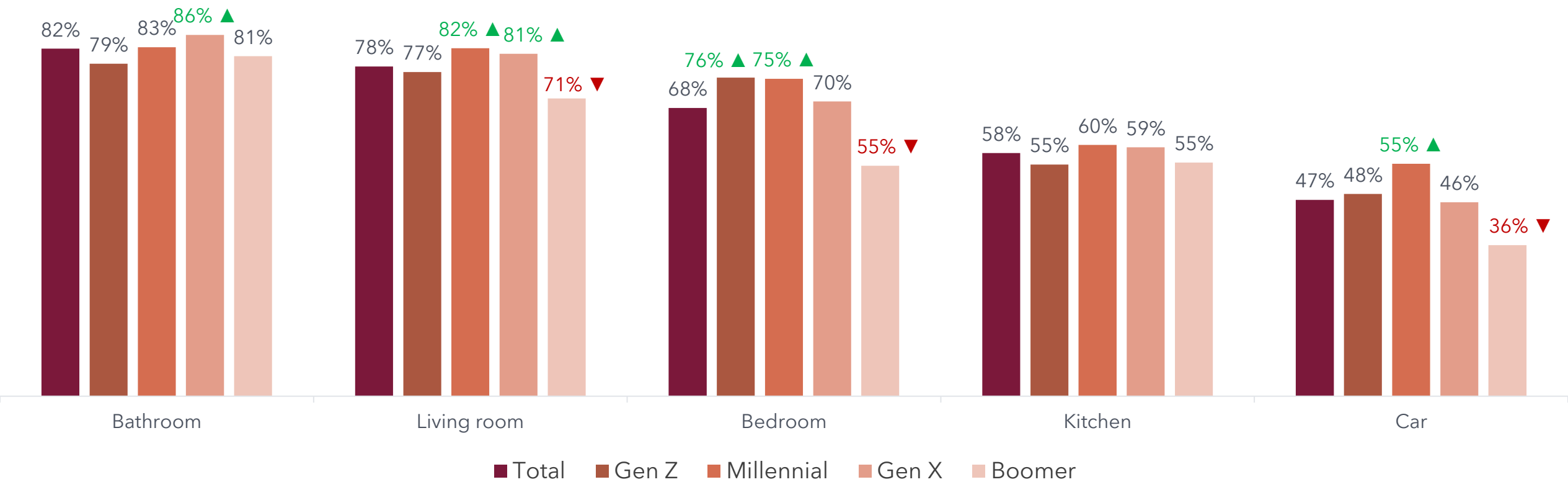


Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Multiselect
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Air Fresheners Are Most Commonly Used in the Bathroom and Living Room, Especially by Millennials and Gen Xers

Younger Gens Are More Likely to Use Them in the Bedroom, Millennials Like Having Them in the Car

Where do you use air fresheners?



Source: Collage Group Category Essentials Fall 2023 (18-77 respondents who use air fresheners), weighted data Multiselect
Significance test: Confidence level 95%. ▲ ▼ over/under Total



Consumption

Drivers

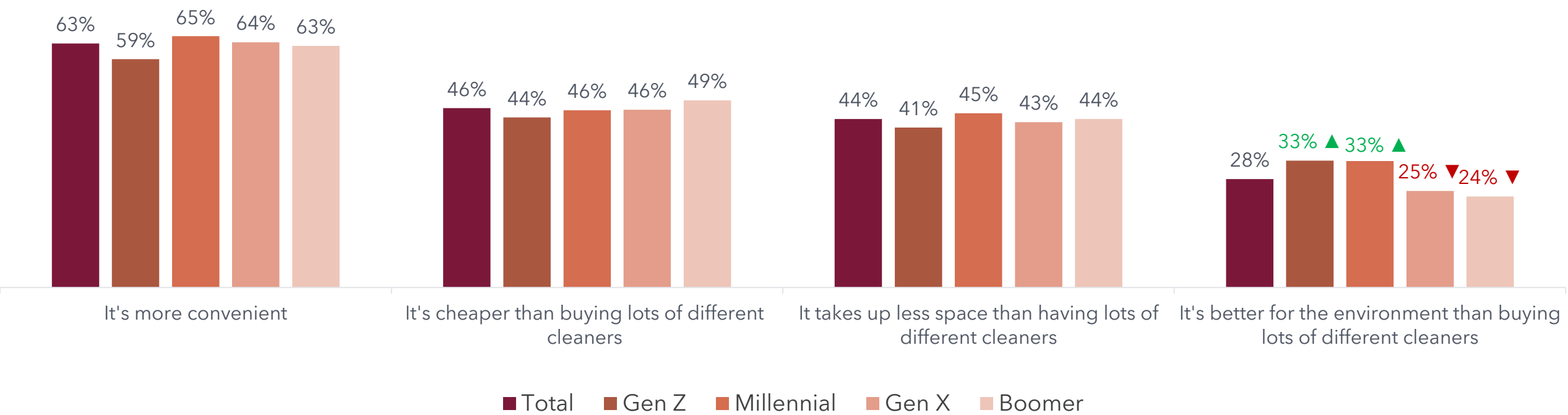
Category & Product

Shopping
Information Gathering
Price & Promotion
Location

Most Consumers Who Use Multipurpose Cleaners Do so out of Convenience

Younger Gens Value That They're More Environmentally Friendly than Other Cleaners

Why do you use a multipurpose cleaner(s)?

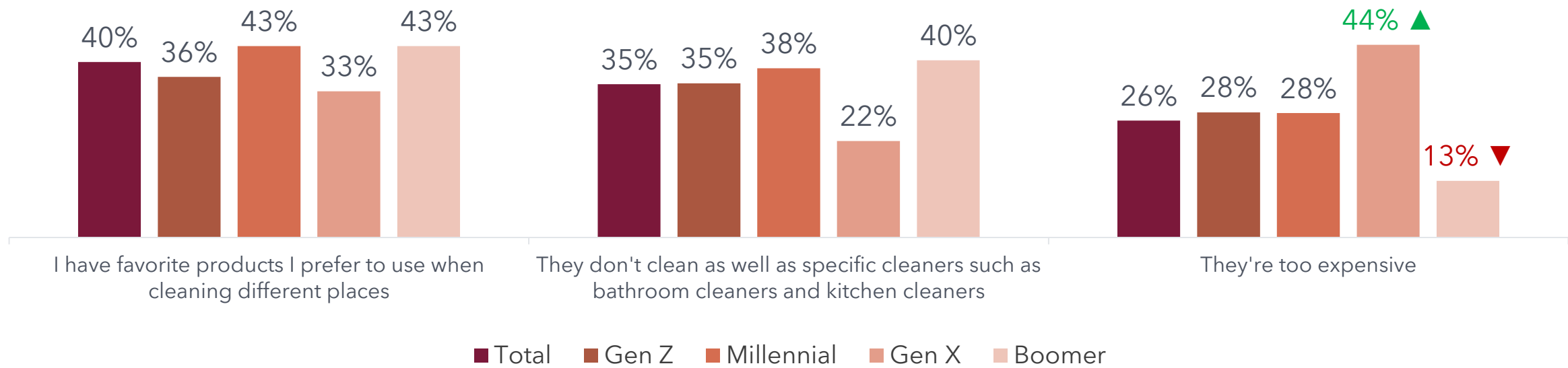


Source: Collage Group Category Essentials Fall 2023 (18-77 respondents who use multipurpose cleaners), weighted data
Multiselect
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Americans That Don't Use Multipurpose Cleaners Believe They Don't Work as Well and Prefer Specific Cleaners for Designated Areas

Nearly Half of Gen Xers Don't Use Multipurpose Cleaners Because They're Too Expensive

Why don't you use multipurpose cleaners?



Source: Collage Group Category Essentials Fall 2023 (18-77 respondents who do not use multipurpose cleaners), weighted data
Multiselect
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Younger Gens Value Sustainable Packaging, Brand Actions, and a Luxury Feel When Choosing a New Home Care Brand

Friends and Family Recs Are Most Influential across Generations, but Boomers also Enjoy Trial Sizes

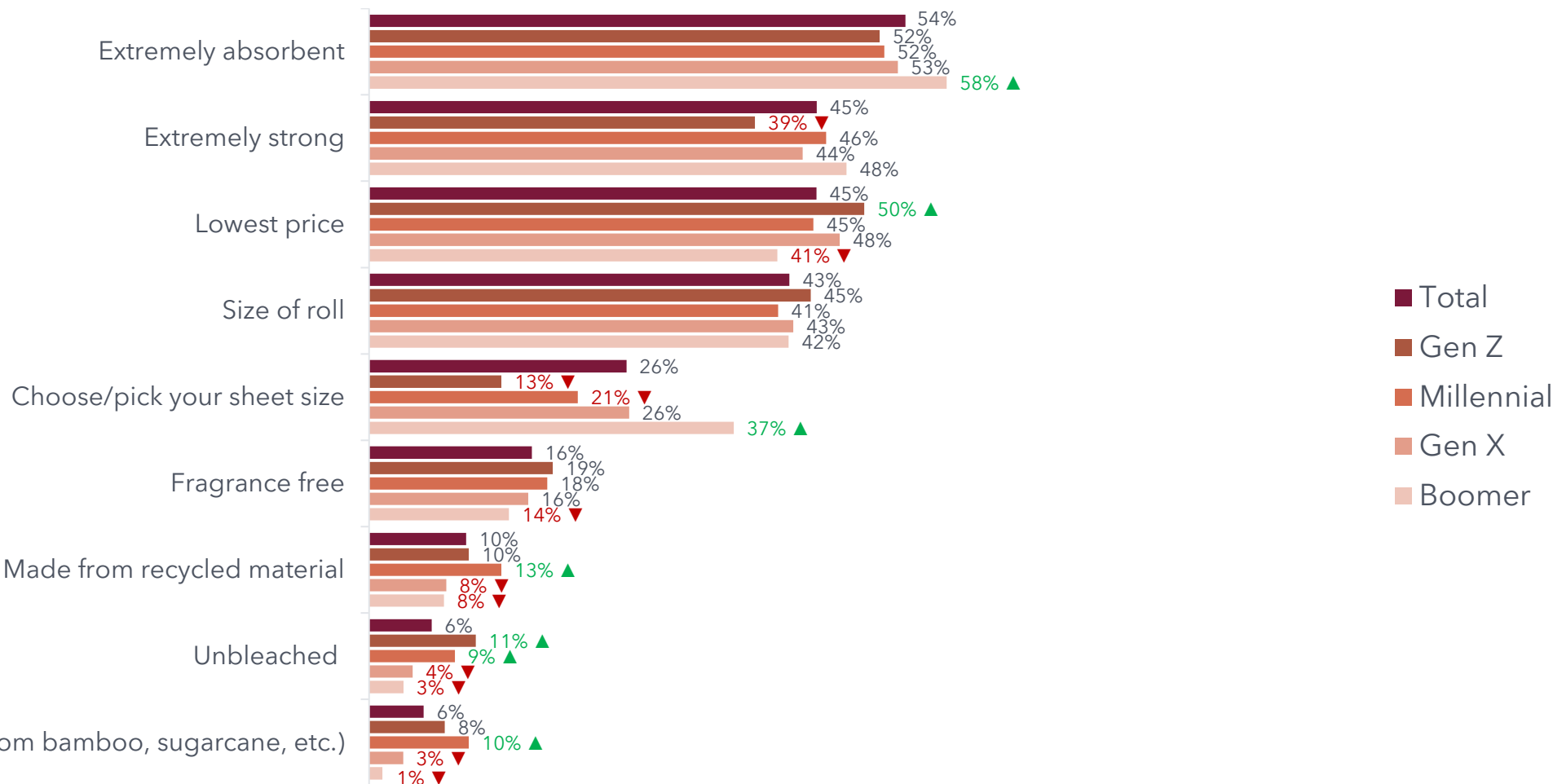
Which of the following could convince you to try a home care brand you haven't tried before such as a laundry detergent, dish soap, or other cleaning product?

	Total	Gen Z	Millennial	Gen X	Boomer
Recommended by a family member or friend	46%	49%	45%	47%	45%
A new, innovative product formula (e.g., more effective active ingredients, more concentrated formulas, etc.)	40%	35% ▼	43%	43%	38%
Option to buy a small, lower cost trial size	37%	38%	34% ▼	36%	41% ▲
Eco-friendly packaging (e.g., uses less plastic, uses recycled materials)	29%	33%	34% ▲	28%	24% ▼
Brand donates a percent of sales to a cause I care about	18%	22% ▲	24% ▲	15% ▼	12% ▼
Brand is perceived as premium or luxury	17%	17%	23% ▲	17%	9% ▼
Recommended by a celebrity or influencer I like	9%	14% ▲	15% ▲	7% ▼	2% ▼

Consumers Look for Absorbency and Strength When Shopping for Paper Towels, Especially Boomers

Gen Z Is More Likely than Others to Go for the Lowest Price and Largest Rolls

Which of the following things are most important when shopping for paper towels?

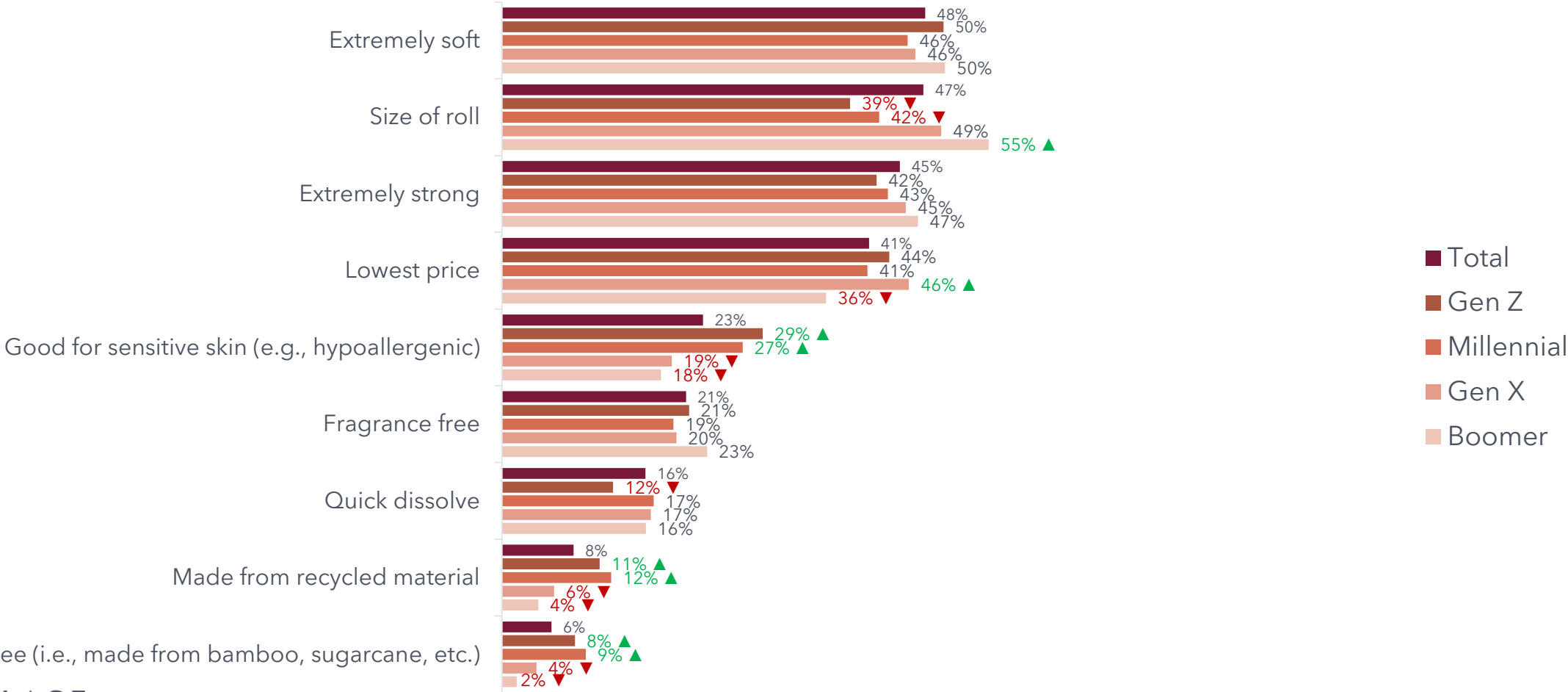


Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Multiselect, max. 3
Significance test: Confidence level 95%. ▲ ▼ over/under Total

The Softness, Strength, and Size of Roll Are Most Important When Buying Toilet Paper

Boomers Especially Look at Price While Younger Gens Want Sensitive Skin Products

Which of the following things are most important when shopping for toilet paper?

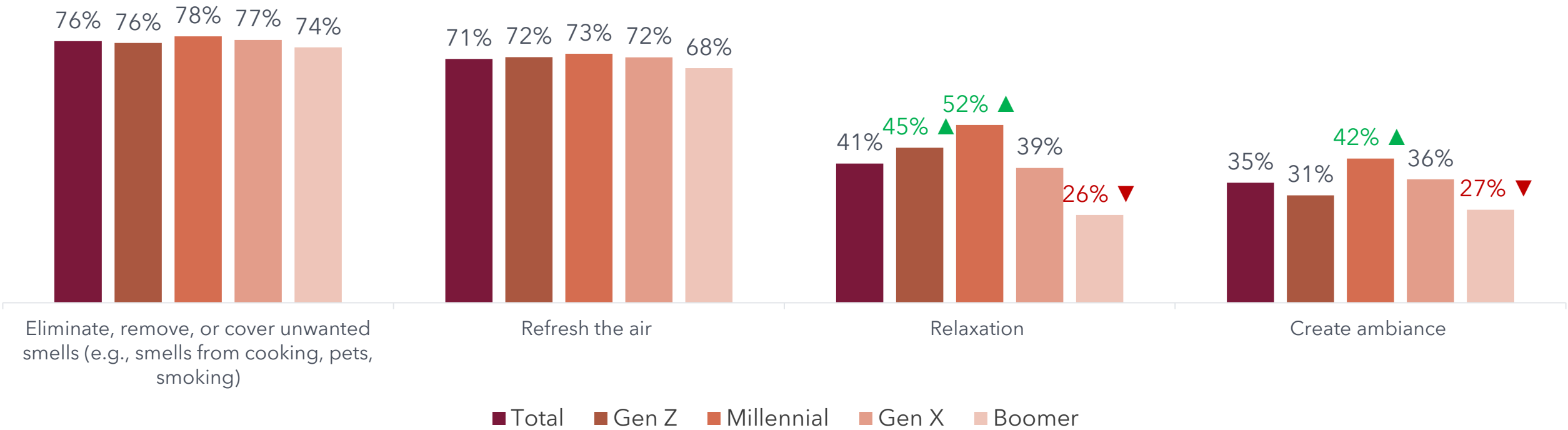


Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
Multiselect, max. 3
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Americans Primarily Use Air Fresheners to Eliminate Unwanted Odors and Refresh the Air

Millennials Also Stand out for Using Them to Relax and Create Ambiance

Why do you use air fresheners?

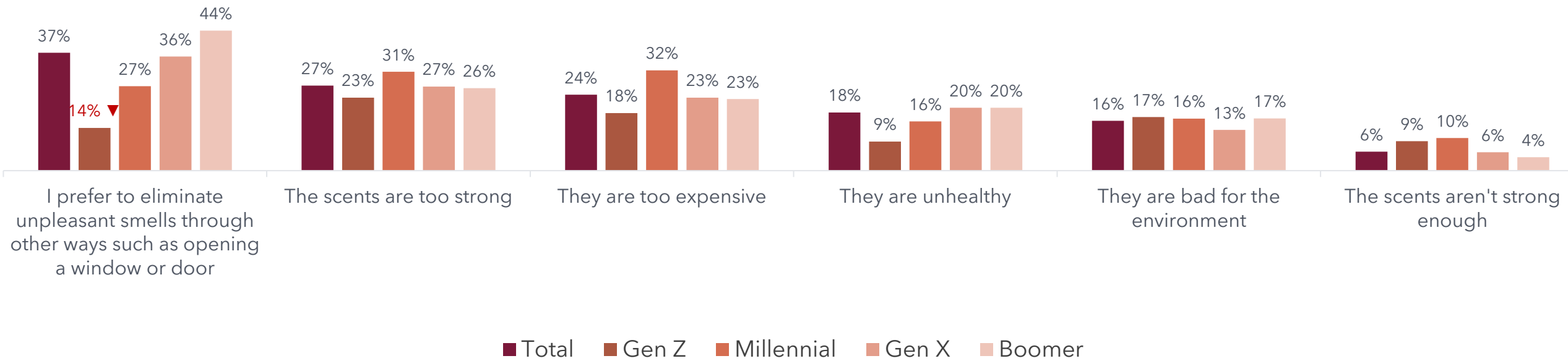


Source: Collage Group Category Essentials Fall 2023 (18-77 respondents who use air fresheners), weighted data Multiselect
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Those Who Don't Use Air Fresheners Prefer to Use Alternative Methods to Eliminate Odors

A Quarter of Americans Think Fresheners Smell Too Strong and Are Too Expensive

Why don't you use air fresheners?

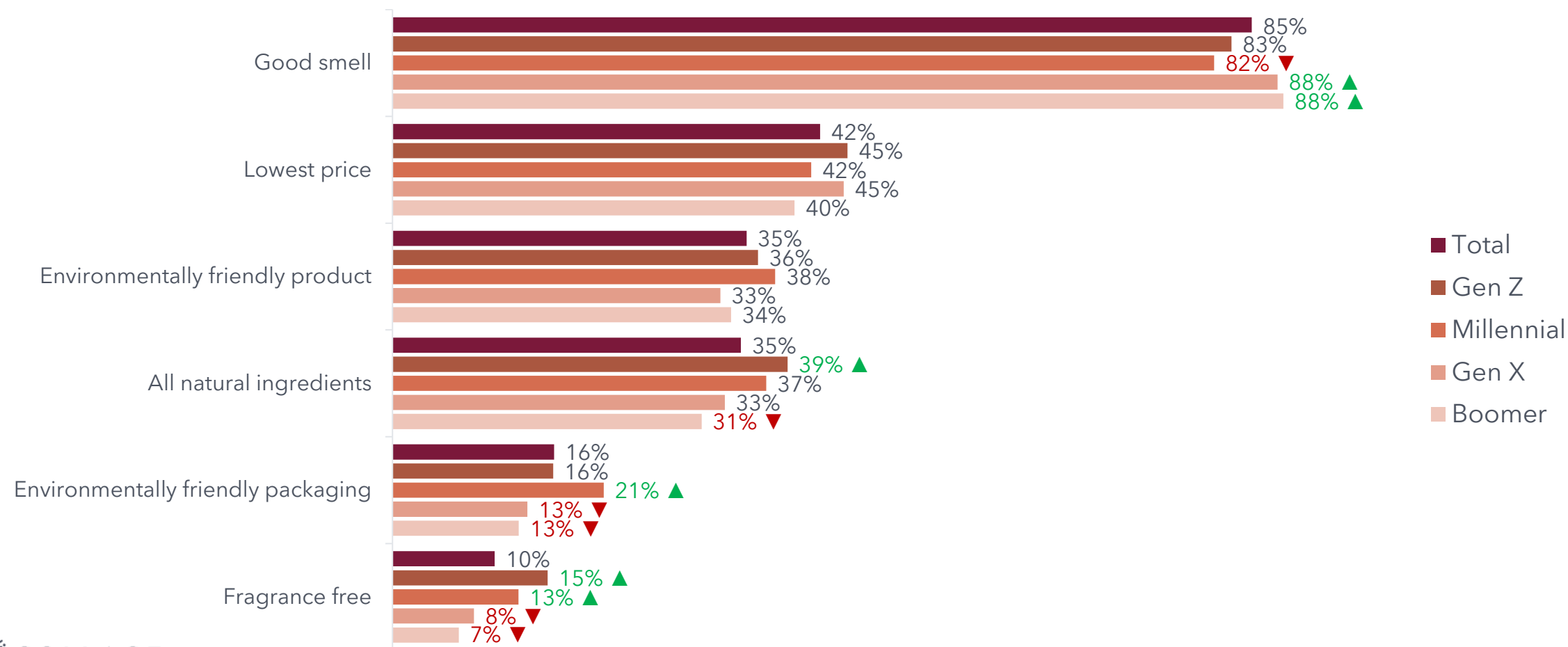


Source: Collage Group Category Essentials Fall 2023 (18-77 respondents who do not use air fresheners), weighted data
Multiselect
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Scent Is Most Important When Buying Air Fresheners

Younger Gens Especially Care about All Natural Ingredients and Fragrance-Free Options

Which of the following things are most important when shopping for an air freshener?



Source: Collage Group Category Essentials Fall 2023 (18-77 respondents who use air fresheners), weighted data
Multiselect, max. 3
Significance test: Confidence level 95%. ▲ ▼ over/under Total



Consumption

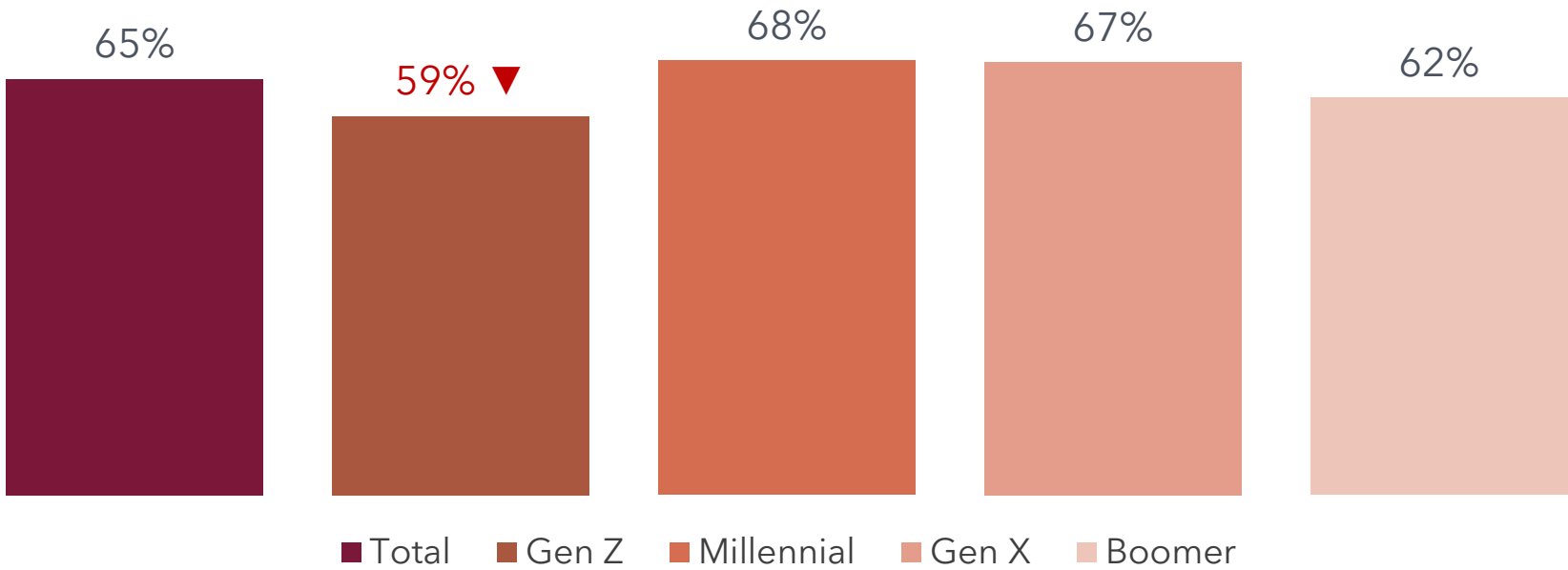
Drivers
Category & Product

Shopping
Information Gathering
Price & Promotion
Location

Two-Thirds of Consumers Prefer Double or Triple Size Rolls of Toilet Paper

However, Gen Z Is Least Likely to Care

I prefer double size or triple size rolls of toilet paper

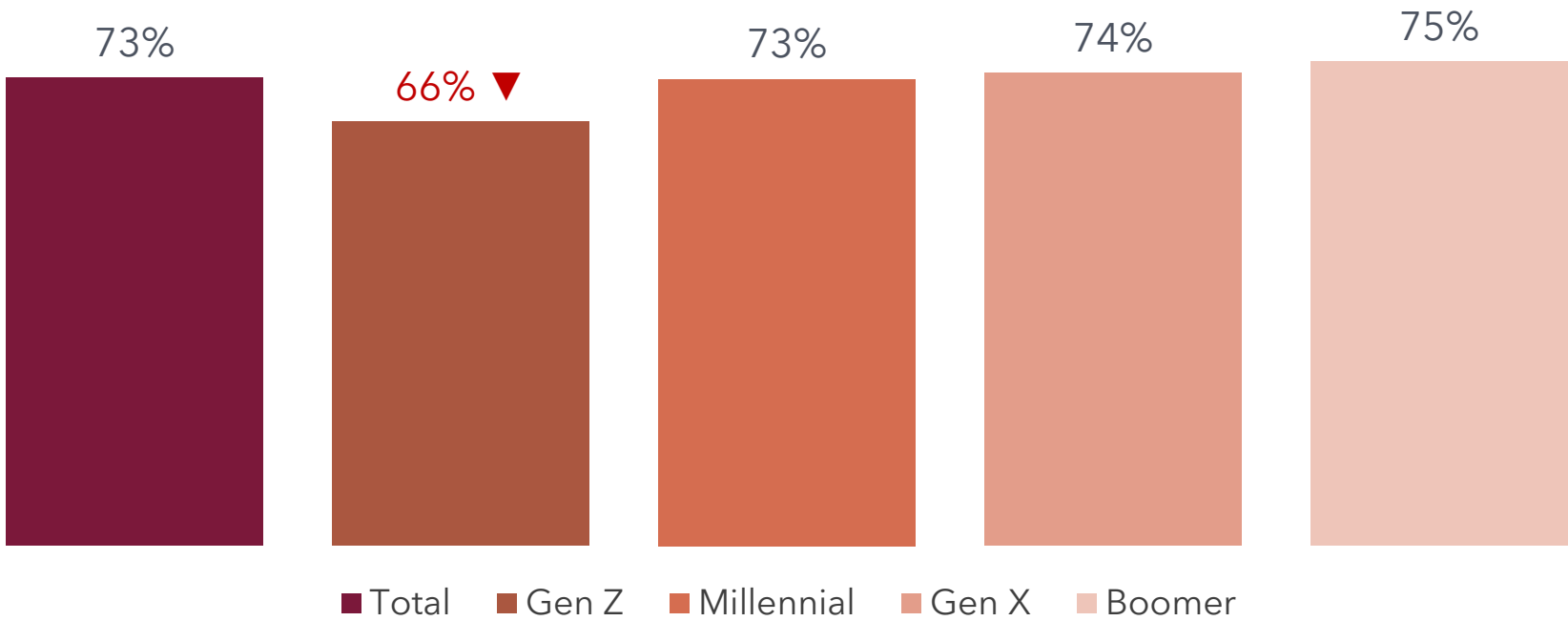


Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
% agree, strongly agree
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Nearly Three-Quarters of Americans Stock up on Paper Products

But Gen Z Is Least Likely to Stock up

I usually stock up on paper products (toilet paper, paper towels)

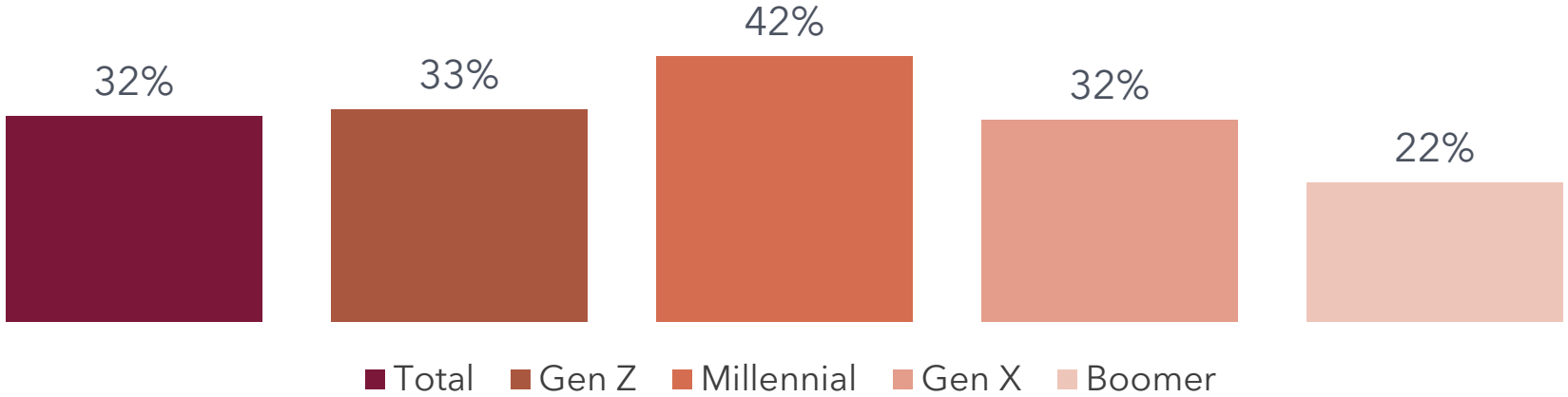


Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
% agree, strongly agree
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Millennials Are Most Likely to Order Paper Products Online

Roughly a Third of Gen Z and Gen X Look to Online Sellers

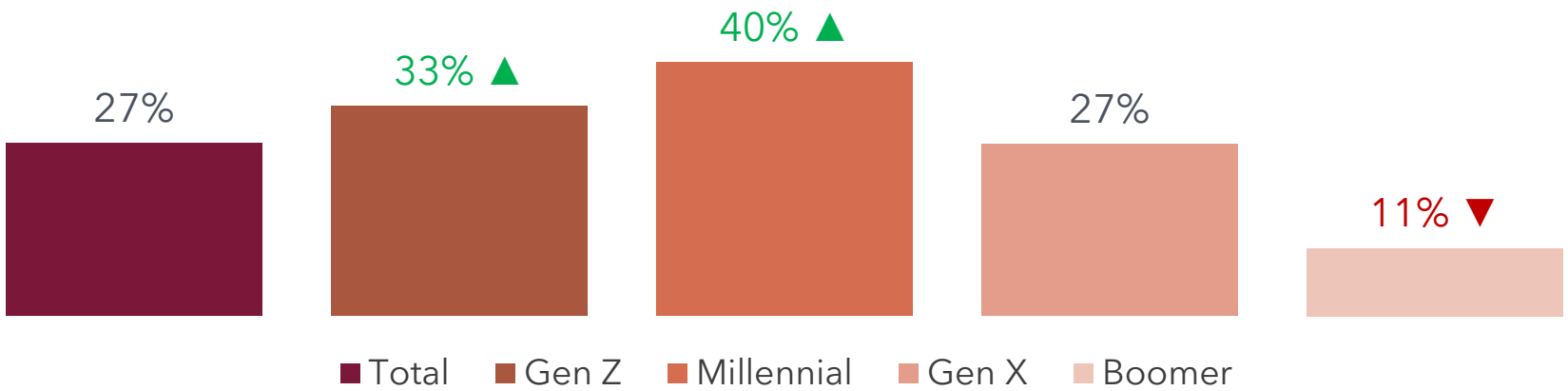
I usually purchase paper products (toilet paper, paper towels) online



Source: Collage Group Category Essentials Fall 2023 (18-77 population), weighted data
% agree, strongly agree
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Over a Third of Gen Z and Millennials Are Interested in Periodic Paper Product Subscriptions

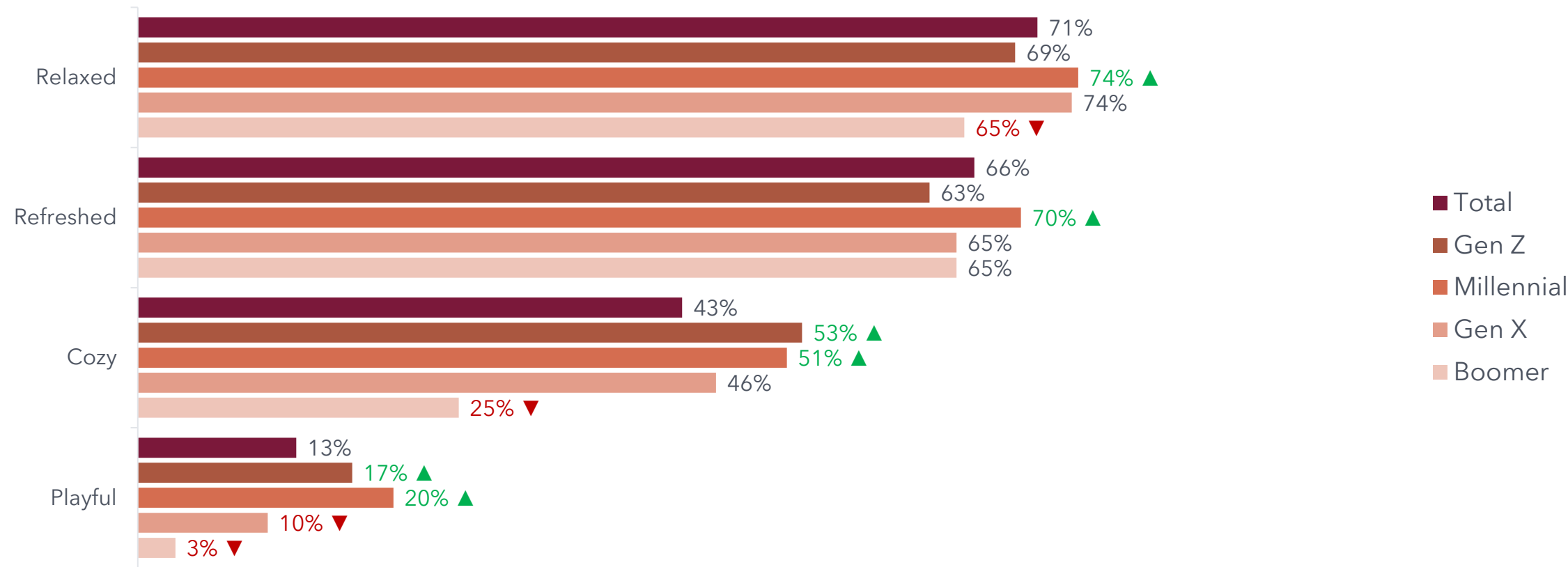
I'm interested in having a subscription to paper products (toilet paper, paper towels, etc.) that automatically sends them at regular periods



Americans across Generations Look for Fragrances that Are Relaxing and Refreshing

Younger Gens Are More Likely to Enjoy Cozy or Playful Scents as Well

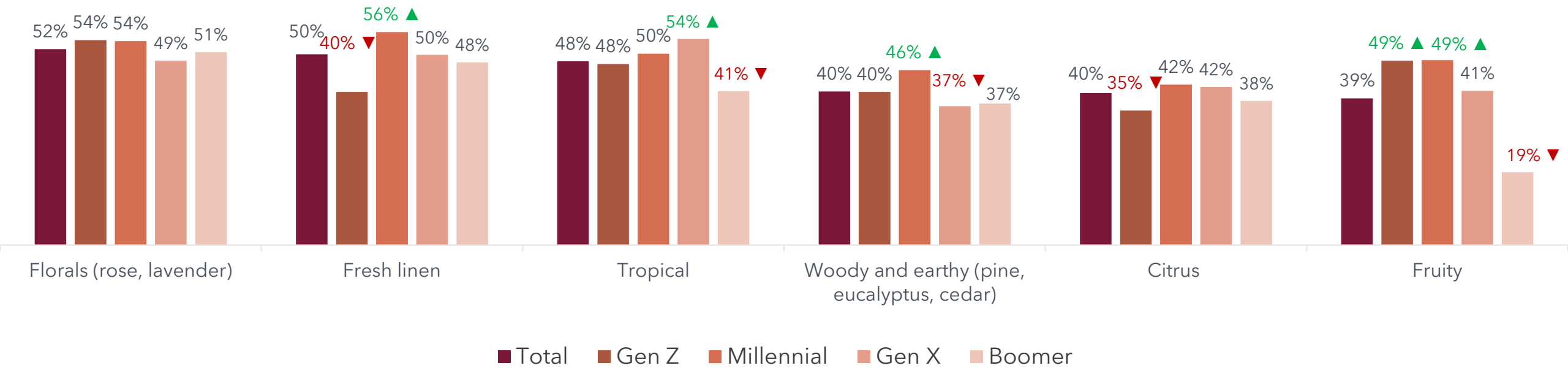
I usually purchase/use air fresheners with fragrances that make me feel...



Source: Collage Group Category Essentials Fall 2023 (18-77 respondents who use air fresheners), weighted data
Multiselect
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Air Freshener Scents Divide Gens: Gen Z and Boomers Prefer Floral, Millennials Like Fresh Linen, and Gen X Opts for Tropical

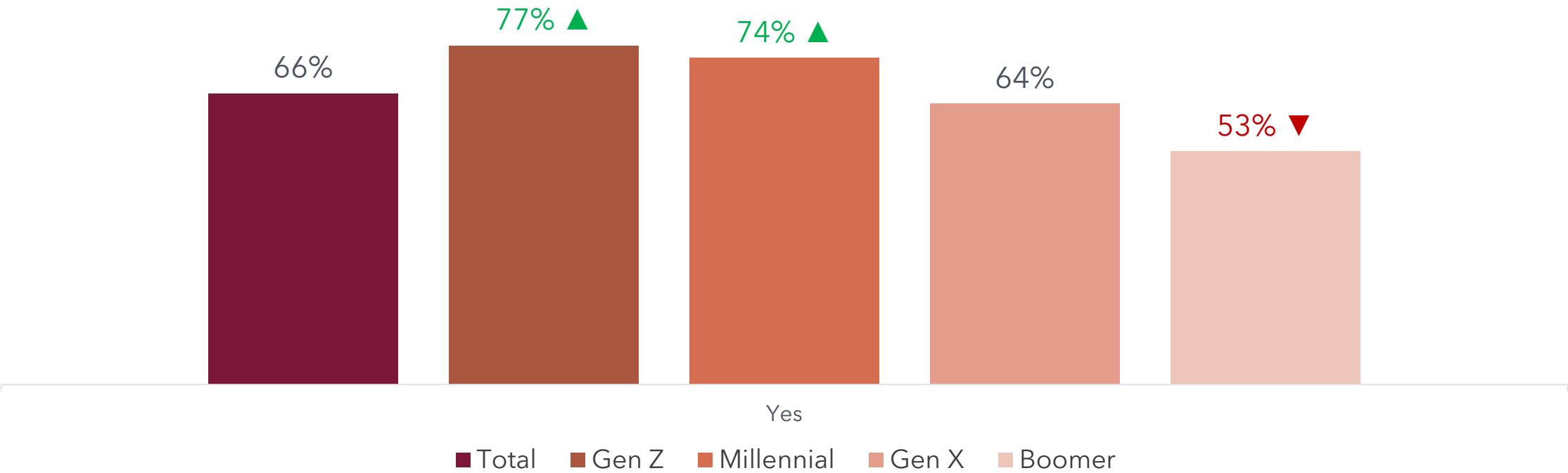
What scents do you prefer when purchasing/using air fresheners?



Source: Collage Group Category Essentials Fall 2023 (18-77 respondents who use air fresheners), weighted data
Multiselect
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Most Americans Buy Specific Scents for the Fall and Holidays Season, Including Three-Quarters of Gen Z and Millennials

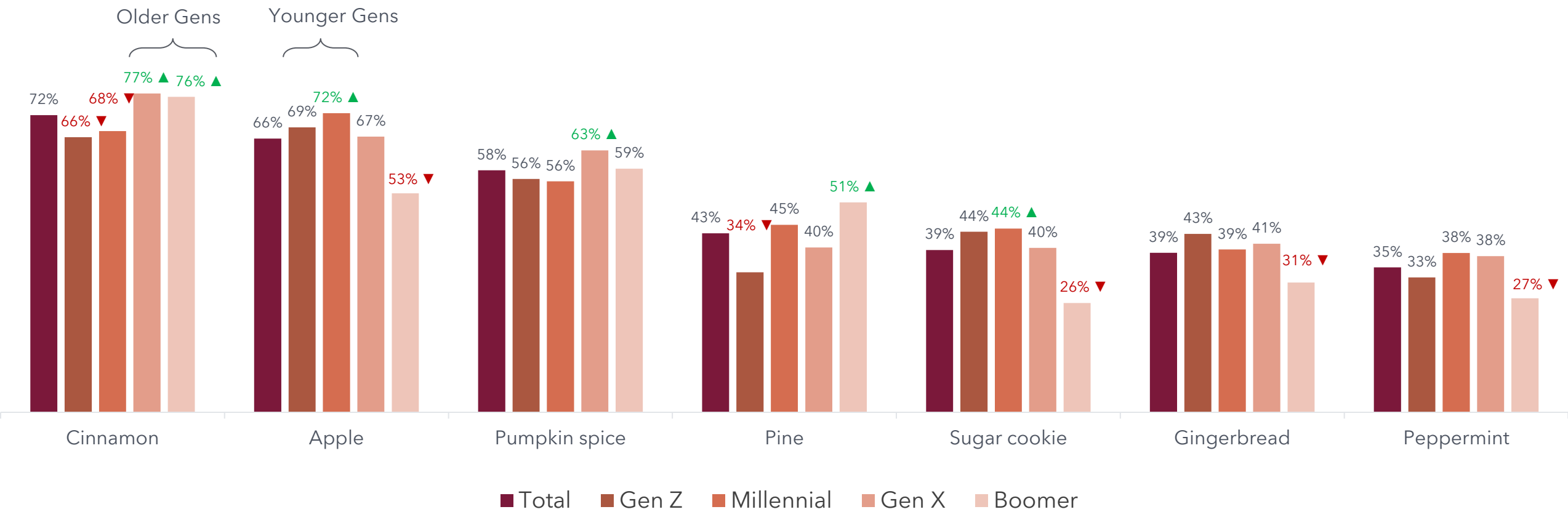
Do you purchase specific scents for the fall/holiday season?



Source: Collage Group Category Essentials Fall 2023 (18-77 respondents who use air fresheners), weighted data
% Yes
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Cinnamon Is the Favorite Scent among Gen X and Boomers for the Fall/Holiday Season while Gen Z and Millennials Prefer Apple the Most

Which of the following scents have you (or would you) purchased for the fall/holiday season?



Source: Collage Group Category Essentials Fall 2023 (18-77 respondents who use specific scents for the fall/holiday season), weighted data Multiselect
Significance test: Confidence level 95%. ▲ ▼ over/under Total

Key Takeaways and Action Steps: Home Care & Fragrance

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Millennials are driven to try new homecare products that are eco-friendly or luxurious. Eco-friendliness is important for a generation with young kids at home, and using luxurious cleaning products fits with Millennials overall desire to treat themselves with affordable, daily luxuries.

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Thank You!
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