Thought Leadership Report

HOME CARE DURING A PANDEMIC

November 2021
Executive Summary

The COVID-19 pandemic increased awareness of sanitation and cleanliness. In part to protect household members from the coronavirus as well as to keep up with the mess resulting from increased at-home activity and consumption, consumers upped their purchases of products to keep the home clean and comforting. This report highlights current trends and opportunities to keep the clean movement going.

CHANGING SHAPE OF THE CPG DEMAND CURVE
- Home care remains a priority in Q3 2021, especially as many workers will continue to work from home more than pre-pandemic.
- Countertops are the most frequently cleaned surface. Nearly 60% of consumers clean these surfaces daily or multiple times throughout the day.
- Trusted national brands continue to grow sales; private brands lag national brands in sales.
- Disinfecting and sanitizing are the top attributes shoppers look for in cleaning products, with a desirable scent also an important attribute.
- While the grocery channel played an important role during the pandemic, mass / supercenters are the preferred channel for cleaning needs.
- Retailers continue to see gains in cleaning products sold via e-commerce, with ship-to-home the preferred fulfillment type.
- E-commerce levels the playing field for many direct-to-consumer cleaning brands. Many of these brands are making the leap to physical stores.
- Sales of sustainably marketed products are increasing; many sustainably marketed cleaning products command a price premium.

EMERGING OPPORTUNITIES
- Pandemic cleaning behaviors continue to stick. Marketers have an opportunity to promote additional cleaning regimens, especially for areas such as doorknobs and light switches. Seek to inform, not scare.
- A clean home is a healthy home – home care is a key element of the self-care evolution as health and wellness is nearly ubiquitous across households.
- Product efficacy should be a top marketing message; scent is also a trending attribute.
- Direct-to-consumer options encourage subscription and replenishment; many benefit from “telling their story” and promoting transparency and benefits.
- Consumers will gravitate toward convenient solutions; multi-benefit products are often perceived as convenient.
- Sales growth of sustainably marketed products outpace conventionally marketed products. Carbon labeling is on the rise.
- Consumers demonstrate a willingness to pay a premium for sustainable products. Demonstrate effectiveness of cleaning products and promote the benefits that matter most to target audience.
- Sustainability encompasses economic, social and environmental challenges; and the importance of each varies by generation.

Target audiences with messaging that resonates.
The Pandemic Brought U.S. Back Home and It Impacted How We Clean

Frequency

Efficacy

Convenience

Sustainability
The State of Clean Remains Amplified Beyond the Outset of the Pandemic

Home Cleaning + Laundry Weekly Dollar Sales Trend

$972.8MM
COVID-19 Peak 1 WE March 15, 2020

$528.6MM
Post COVID-19 Peak Weekly Avg.

$448.1MM
2019 Weekly Avg.

Source: IRI Market Advantage, MULOC, 52WE 10/3/21
COVID-19 Put the Need for a Clean Home Front and Center and This Will Continue After the Pandemic Subsides

Americans’ focus on health and wellness as more than physical well-being has been amplified by the pandemic. 93% prioritize health and wellness in some way.

Household Cleaning Aisle Dollar Sales ($B)

73% Take Cleaning More Seriously Due to COVID-19


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More People Continue to Work From Home

70% of consumers rarely or never worked from home before coronavirus

45% of consumers are likely work at home at least some of the time

The most well-known companies transitioning to part-time and permanent WFH arrangements include:

- Google
- Twitter
- Square
- Dropbox
- Microsoft
- Facebook
- Slack
- REI

Respondents in the South say they are working more hours than before the pandemic, while only 10% in the West report they’re working more hours.

Source: IRI Weekly Surveys among IRI Consumer Network™ Panel representing Total U.S. Primary Grocery Shoppers collected 7-21-2021
With More Meal Occasions, the Need to Clean Remains High

33MM Additional Lunch & Breakfast Occasions at Home Mean:

More Meals…

…and More Mess!

## Household Shopping Trips and Basket Dollars for Cleaning Products Hover at Pre-Pandemic Levels

### Aisle Household Cleaning – Retailer Trips per Shopper, In-Basket Dollars per Trip / 52 WE 09/05/2021

<table>
<thead>
<tr>
<th>Channels</th>
<th>Retailer Trips per Shopper</th>
<th>In-Basket Dollars per Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>52 WE 01/26/2020</td>
</tr>
<tr>
<td>All Outlets</td>
<td>41.4</td>
<td>$80</td>
</tr>
<tr>
<td>Grocery</td>
<td>53.9</td>
<td>$87</td>
</tr>
<tr>
<td>Club</td>
<td>12.7</td>
<td>$157</td>
</tr>
<tr>
<td>Drug</td>
<td>10.4</td>
<td>$30</td>
</tr>
<tr>
<td>Mass / Supercenter</td>
<td>8.5</td>
<td>$67</td>
</tr>
<tr>
<td>Dollar</td>
<td>14.0</td>
<td>$21</td>
</tr>
<tr>
<td>Convenience</td>
<td>7.7</td>
<td>$84</td>
</tr>
</tbody>
</table>

Note: Walmart not included in grocery or mass/super; Source: IRI Consumer and Shopper Insights Advantage™, All Outlets, 52 WE 09/05/2021, 26 WE 09/06/2020, 52 WE 01/26/2020, NBD aligned
Laundry Product Trips in L52 Weeks Returned to Almost Pre-Pandemic Levels, Basket Dollars Remain Elevated Since Pandemic

Aisle Laundry - Retailer Trips per Shopper,
In-Basket Dollars per Trip / 52 WE 09/05/2021

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<td>52 WE 01/26/2020</td>
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<td></td>
<td>$25</td>
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<tr>
<td>Mass / Supercenter</td>
<td></td>
<td>$77</td>
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<tr>
<td>Dollar</td>
<td></td>
<td>$23</td>
</tr>
<tr>
<td>Convenience</td>
<td></td>
<td>$81</td>
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</tbody>
</table>

Note: Walmart not included in grocery or mass/super; Source: IRI Consumer and Shopper Insights Advantage™, All Outlets, 52 WE 09/05/2021, 26 WE 09/06/2020, 52 WE 01/26/2020, NBD aligned
Cleaning Frequency, Total Respondents

Countertops are the most frequently cleaned household surface, followed by floors.

The American Cleaning Institute reports that doorknobs and light switches are among the most neglected household areas. They should be cleaned at least two times per week.*

Self-Care

Self-care is the intentional engagement in strategies that support your physical, emotional, social, mental and spiritual well-being.

Defines the New Normal
Home Care Is a Key Element of the Self-Care Evolution

Americans are approaching wellness in a more holistic way. Six key themes emerged or accelerated during the pandemic and will be felt into 2022 and beyond.

Getting Back to Basics
Hygiene / Vitamins / OTC
Looking Good = Feeling Good

A Clean Home Is a Healthy Home
Home / Laundry

Sleep Your Way to Good Health
Desire for Better Sleep, Seek Support from OTCs

Mental Health Affects Physical Health
Increased Stress and Anxiety, Desire for Mental Clarity

Prevention is the Best Medicine
Immunity Seekers Use 5-6 Methods Beyond Food to Prevent Illness; Immunity + Gut Health

Diet and Exercise Are Winning Strategies
Food Empowers the Desire to be Physically Fit; Rise of Plant-Based/Vegan
Cleaning’s Health Benefits Go Beyond Killing Germs

52% A clean home is a healthy home
31% Keeping my home clean is a priority to keep me/my family healthy
31% Cleaning my home reduces my stress/anxiety levels
58% Have a regular laundry care routine

Quarantining and WFH Situations Spiked
Demand for Cleaning and Laundry Care Products
(late 2020)

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<td>Purchase Occasions/Buyer</td>
<td>23%</td>
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BASE: Total U.S. Population Aged 17+  IRI Wellness Thought Leadership Survey / November, 2020 / Total U.S. (4-Region Total) - All Outlets / 52 weeks ending 12/27/2020

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Have a regular laundry care routine

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Nearly 40% of Shoppers Surveyed Have Been Cleaning More Frequently and Will Continue to Clean More Frequently

**Anticipated Cleaning Regimens Adopted During the Pandemic That Will Continue in Future, Total Respondents**

- Continue to use disinfecting products and will continue to clean more frequently: 39%
- Bring cleaning products (e.g., hand sanitizer, wipes) for use when I’m outside my home: 31%
- Plan to keep buying extra cleaning products to have plenty of extra on hand in case there’s a shortage: 20%
- Continue to use disinfecting products, but won’t clean as often: 13%
- Will go back to using all-natural cleaners: 3%

Source: IRI Survey representing Total U.S. Primary Grocery Shoppers fielded among the National Consumer Panel August 6-10, 2021

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Change in Cleaning Products Compared to 1 or 2 Years Ago

12% of respondents anticipate they’ll be cleaning more in the upcoming year; 86% anticipate they’ll clean about the same next year as they currently do.

- Purchase / use more antimicrobial / disinfecting products: 23%
- Purchase more cleaning wipes for home use: 23%
- Purchase more products to use when away from home, including hand sanitizer or wipes: 19%
- Purchasing more multipurpose products: 16%
- Have a different mix of natural and conventional products to clean my home: 12%
- Use more bleach to clean hard surfaces: 10%
- Purchase / use more all-natural cleaning products: 10%
- Choose more store brand products: 8%
- Choose more name-brand products: 6%

Base = Those who have changed their cleaning products, n=574. Source: IRI Survey representing Total U.S. Primary Grocery Shoppers fielded among the National Consumer Panel August 6-10, 2021
Almost Half of Respondents Report Changing to Cleaning Products That Disinfect or Prevent Illness

Reason for Changes Made to the Products Used to Clean the Home, Total Respondents

77% of respondents from households with children aged 6-17 report purchasing hand sanitizer for their child(ren) to use at school.

- More focused on disinfecting: 49%
- More focused on cleaning to prevent illness: 45%
- More concerned about keeping my hands or surfaces clean when away from home: 30%
- Spending more time at home, so need to clean more: 27%
- Wanted a more effective product: 23%
- Looking for more eco-friendly options: 22%
- Looking for lower-priced options: 20%
- Product I used to buy wasn’t available: 11%

Source: IRI Survey representing Total U.S. Primary Grocery Shoppers fielded among the National Consumer Panel August 6-10, 2021

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Consumers Rely on Cleaning Products From Trusted Manufacturers

**Top Growing Total Home Cleaning ($ Millions) / 2020 vs. 2019 / YTD 2021 vs. 2YA**

<table>
<thead>
<tr>
<th>Company</th>
<th>2020</th>
<th>% Change from YA</th>
<th>YTD 2021</th>
<th>% Change from 2YA</th>
</tr>
</thead>
<tbody>
<tr>
<td>P&amp;G</td>
<td>+$1,882.3</td>
<td>+18.2%</td>
<td>$2,110.0</td>
<td>+26.5%</td>
</tr>
<tr>
<td>Reckitt Benckiser</td>
<td>+$797.1</td>
<td>+39.8%</td>
<td>+$716.2</td>
<td>+46.5%</td>
</tr>
<tr>
<td>The Clorox Company</td>
<td>+$569.8</td>
<td>+31.4%</td>
<td>+$221.2</td>
<td>+15.5%</td>
</tr>
<tr>
<td>SC Johnson</td>
<td>+$205.7</td>
<td>+11.8%</td>
<td>+$14.0</td>
<td>+1.0%</td>
</tr>
<tr>
<td>Procter &amp; Gamble</td>
<td>+$132.8</td>
<td>+7.9%</td>
<td>+$75.8</td>
<td>+5.8%</td>
</tr>
<tr>
<td>Unilever</td>
<td>+$62.6</td>
<td>+34.9%</td>
<td>+$20.2</td>
<td>+14.8%</td>
</tr>
</tbody>
</table>

Source: IRI Market Advantage, MULOC, 52WE 10/3/21
Name Brands That Tout Desired Efficacy See Strong Sales

Top Selling Home Cleaning Brands / $ Sales Growth 2020 YA + YTD 2021 $ Sales % Change vs. YA

<table>
<thead>
<tr>
<th>Brand</th>
<th>2020 YA Sales</th>
<th>YTD 2021 Sales</th>
<th>% Change vs. YA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dawn</td>
<td>+$323.0MM</td>
<td>+$296.3MM</td>
<td>+27.0%</td>
</tr>
<tr>
<td>Lysol</td>
<td>+$296.3MM</td>
<td>+$251.6MM</td>
<td>+25.0%</td>
</tr>
<tr>
<td>CLOROX</td>
<td>+$251.6MM</td>
<td>+$178.8MM</td>
<td>-5.8%</td>
</tr>
<tr>
<td>CLOROX Wipes</td>
<td>+$251.6MM</td>
<td>+$178.8MM</td>
<td>-9.1%</td>
</tr>
<tr>
<td>Gain</td>
<td>+$175.9MM</td>
<td>+$178.8MM</td>
<td>+7.1%</td>
</tr>
</tbody>
</table>

Source: IRI Market Advantage, MULOC, 52WE 10/3/21
In 2021, Consumers Are Relying Less on Private Brands, While Sales Growth of National Brands is Softer than YA

Total Home Cleaning Branded vs. Private Label $ Sales Change vs. YA

<table>
<thead>
<tr>
<th></th>
<th>Brand</th>
<th>Private Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>2.5%</td>
<td>-0.4%</td>
</tr>
<tr>
<td>2017</td>
<td>1.5%</td>
<td>5.1%</td>
</tr>
<tr>
<td>2018</td>
<td>2.2%</td>
<td>5.2%</td>
</tr>
<tr>
<td>2019</td>
<td>1.2%</td>
<td>11.1%</td>
</tr>
<tr>
<td>2020</td>
<td>17.9%</td>
<td>24.8%</td>
</tr>
<tr>
<td>2021</td>
<td>0.6%</td>
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Source: IRI Market Advantage, MULOC, 52WE 10/3/21
Disinfecting and Sanitizing Are the Top Growth Segments, Along with New Cleaning Brands

**Total Dollar Sales**

### Cleaning

<table>
<thead>
<tr>
<th>Disinfecting</th>
<th>Natural</th>
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<tbody>
<tr>
<td>$4.0B / +27%</td>
<td>$278MM / +13%</td>
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</table>

- **New Products***
  - $385MM
  - 69% New Brands
  - 31% New Items

- **New Products**
  - $6MM
  - 12% New Brands
  - 88% New Items

- **Other New Products**
  - $216MM
  - 33% New Brands
  - 67% New Items

### Sanitizing

<table>
<thead>
<tr>
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<th>Natural</th>
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<td>$180MM/+85%</td>
<td>$194MM / -2%</td>
</tr>
</tbody>
</table>

- **New Products**
  - $0MM
  - 0% New Brands
  - 100% New Items

### Laundry

<table>
<thead>
<tr>
<th>Disinfecting</th>
<th>Natural</th>
</tr>
</thead>
<tbody>
<tr>
<td>$674MM/+41%</td>
<td>$4MM</td>
</tr>
</tbody>
</table>

- **New Products**
  - $15MM
  - 3% New Brands
  - 97% New Items

- **Other New Products**
  - $414MM
  - 20% New Brands
  - 80% New Items

**NOTES:** Disinfecting, Sanitizing, Natural, and New Product Segments are NOT mutually exclusive

*New Products defined as UPCs that have launched within the last 52 weeks; Other New Products not classified as Disinfecting, Natural or Sanitizing

Source: IRI POS Market Advantage, Multi Outlet, New Product Launch Module, 52 Weeks ending 05-23-21
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Beyond Disinfecting, Consumers Seek Products that are Multipurpose or Have a Good Scent.

Top Attributes Sought in Cleaning Products

- Disinfecting: 68%
- Kills Germs: 62%
- Sanitizing: 53%
- Multipurpose: 51%
- Fresh Scent (or Other Scent): 31%
- Provides Long-Lasting Protection from Germs: 25%
- Antimicrobial: 18%
- All Natural / Non-Toxic: 18%
- Eco-Friendly: 17%
- Contains Bleach: 13%
- Nonabrasive: 11%
- Fragrance Free: 10%

New buyers spent more than $118 Million on Home Cleaning products in the latest 52 weeks…

…and nearly $300 Million on Laundry products.
**Cleaning**

New Product Pacesetters Illustrate Cleaning Trends

**Consumers Like the Convenience of Products That Provide Multiple Benefits**

**New Cleaning Products Promoted Disinfecting and Convenience**

Top 100 Nonfood, Home Cleaning and Laundry Products / Year 1 Sales, New Product Pacesetters 2020

<table>
<thead>
<tr>
<th>Rank</th>
<th>Product Name</th>
<th>Sales in MM</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Brawny Tear-a-Square</td>
<td>$105</td>
</tr>
<tr>
<td>7</td>
<td>Viva Multi-Surface Cloth Choose-a-Sheet</td>
<td>$74</td>
</tr>
<tr>
<td>12</td>
<td>Swiffer Pet</td>
<td>$42</td>
</tr>
<tr>
<td>18</td>
<td>Mr. Clean Clean Freak</td>
<td>$30</td>
</tr>
<tr>
<td>39</td>
<td>Clorox Scentiva Cleaning Tools</td>
<td>$18</td>
</tr>
<tr>
<td>63</td>
<td>Swiffer Wet Jet Mr. Clean</td>
<td>$13</td>
</tr>
<tr>
<td>95</td>
<td>Cascade Pure Essentials</td>
<td>$8</td>
</tr>
</tbody>
</table>

**Total New Product Pacesetters Cleaning:** $298 MM

Source: IRI New Product Pacesetters 2020; *figures rounded*
Laundry
New Product Pacesetters Illustrate Cleaning Trends

Consumers Like the Convenience of Products That Provide Multiple Benefits
Top Attributes for Laundry Products Were Scent and Sanitizing

Top 100 Nonfood, Home Cleaning and Laundry Products / Year 1 Sales, New Product Pacesetters 2020

<table>
<thead>
<tr>
<th>Rank</th>
<th>Product Name</th>
<th>Unit Sales (MM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Downy Infusions Scents</td>
<td>$120</td>
</tr>
<tr>
<td>15</td>
<td>Gain Blissful Breeze</td>
<td>$33</td>
</tr>
<tr>
<td>19</td>
<td>Gain Scent Blast</td>
<td>$29</td>
</tr>
<tr>
<td>20</td>
<td>Persil ProClean Discs</td>
<td>$27</td>
</tr>
<tr>
<td>21</td>
<td>Bounce Wrinkle Guard</td>
<td>$26</td>
</tr>
<tr>
<td>22</td>
<td>Tide Heavy Duty 10X</td>
<td>$26</td>
</tr>
<tr>
<td>30</td>
<td>Tide Simply Odor Rescue</td>
<td>$21</td>
</tr>
<tr>
<td>31</td>
<td>Purex 4-in-1 Pacs</td>
<td>$21</td>
</tr>
<tr>
<td>33</td>
<td>Downy Wrinkle Guard</td>
<td>$20</td>
</tr>
<tr>
<td>50</td>
<td>Snuggle Scent Shakes</td>
<td>$15</td>
</tr>
<tr>
<td>98</td>
<td>Tide Studio</td>
<td>$7</td>
</tr>
</tbody>
</table>

Total New Product Pacesetters Laundry: $345MM
Total NPP Cleaning & Laundry: $634MM

Source: IRI New Product Pacesetters 2020; *figures rounded
New Product Pacesetter Rising Stars Indicate Changing Behaviors for Dish Cleaning, With a Focus on Sanitation

Rising Stars: Nonfood

**Dawn® Platinum Powerwash™**
Procter & Gamble
Dish Detergent

**Tide® Hygienic Clean™**
Procter & Gamble
Laundry Detergent

**Microban® 24**
Procter & Gamble
Household Cleaner

To see the top food & beverage and nonfood products, including rank, dollar sales and parent company, please click here.
Mass / Supercenter is the Most Preferred Channel for Purchasing Cleaning Products, With Grocery a Distant Second

No respondents cited convenience stores as a preferred channel for purchasing cleaning products.

Source: IRI Survey representing Total U.S. Primary Grocery Shoppers fielded among the National Consumer Panel August 6-10, 2021

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While Grocery Played a Key Role as a One-Stop-Shop During the Height of the Pandemic, Club and Mass Are Increasing Dollar Share

Total Home Cleaning – $ Share of MULOC Change vs. Year Ago

<table>
<thead>
<tr>
<th></th>
<th>$ Sales % Change vs. YA</th>
<th>2020</th>
<th>YTD 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grocery</td>
<td></td>
<td>-2.8</td>
<td>0.7</td>
</tr>
<tr>
<td>Drug</td>
<td></td>
<td>-0.6</td>
<td>0.1</td>
</tr>
<tr>
<td>Convenience</td>
<td></td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Target</td>
<td></td>
<td>0.8</td>
<td>0.9</td>
</tr>
<tr>
<td>Walmart</td>
<td></td>
<td>-1.9</td>
<td>1.9</td>
</tr>
<tr>
<td>Club</td>
<td></td>
<td>1.4</td>
<td>1.0</td>
</tr>
</tbody>
</table>

Source: IRI Market Advantage, MULOC, 52WE 10/3/21

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Purchase Most of Your Cleaning Products, Store Type, by Region

<table>
<thead>
<tr>
<th>Store Type</th>
<th>East</th>
<th>Central</th>
<th>South</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass / Supercenter</td>
<td>29%</td>
<td>49%</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Grocery</td>
<td>15%</td>
<td>13%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Dollar</td>
<td>4%</td>
<td>9%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Club</td>
<td>6%</td>
<td>8%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Online</td>
<td>7%</td>
<td>6%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Drug</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Convenience</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: IRI Survey representing Total U.S. Primary Grocery Shoppers fielded among the National Consumer Panel August 6-10, 2021
For Purchasing Cleaning Products…

<table>
<thead>
<tr>
<th>Store Type</th>
<th>Gen Z / Younger Millennial</th>
<th>Older Millennial</th>
<th>Gen X</th>
<th>Older Boomers</th>
<th>Younger Boomers</th>
<th>Retirees &amp; Seniors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass / Supercenter</td>
<td>54%</td>
<td>50%</td>
<td>38%</td>
<td>36%</td>
<td>39%</td>
<td>52%</td>
</tr>
<tr>
<td>Grocery</td>
<td>28%</td>
<td>30%</td>
<td>20%</td>
<td>18%</td>
<td>39%</td>
<td>38%</td>
</tr>
<tr>
<td>Dollar</td>
<td>14%</td>
<td>11%</td>
<td>10%</td>
<td>8%</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Club</td>
<td>15%</td>
<td>13%</td>
<td>11%</td>
<td>9%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Online</td>
<td>6%</td>
<td>8%</td>
<td>5%</td>
<td>9%</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Drug</td>
<td>7%</td>
<td>5%</td>
<td>4%</td>
<td>6%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Convenience</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: IRI Survey representing Total U.S. Primary Grocery Shoppers fielded among the National Consumer Panel August 6-10, 2021

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Younger Generations Prefer Mass / Supercenter and Older Generations Prefer Grocery
Mass / Supercenter is the Channel of Choice Across Income Groups

Grocery and Club Lead With Upper Income

Dollar and Online Lead With Lower Income Group

Purchase Most of Your Cleaning Products, Store Type, by Income

<table>
<thead>
<tr>
<th>Store Type</th>
<th>Lower Income (&lt;$30k 1P + $5k per add'l person)</th>
<th>Middle Income ($30-$70k 1P + $5k per add'l person)</th>
<th>Higher Income (&gt;-$70k 1P + $30k all others)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass / Supercenter</td>
<td>48%</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>Grocery</td>
<td>21%</td>
<td>22%</td>
<td>29%</td>
</tr>
<tr>
<td>Dollar</td>
<td>9%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Club</td>
<td>10%</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>Online</td>
<td>7%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Drug</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Convenience</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: IRI Survey representing Total U.S. Primary Grocery Shoppers fielded among the National Consumer Panel August 6-10, 2021
Strong E-Commerce Sales of Home Care Products Continue in 2021

**Total Home Care E-Commerce Sales % Change vs. Year Ago**

<table>
<thead>
<tr>
<th>Store</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walgreens</td>
<td>+533.4%</td>
</tr>
<tr>
<td>Meijer</td>
<td>+59.5%</td>
</tr>
<tr>
<td>Target</td>
<td>+45.7%</td>
</tr>
<tr>
<td>Amazon</td>
<td>+32.6%</td>
</tr>
<tr>
<td>Walmart</td>
<td>+26.1%</td>
</tr>
<tr>
<td>Publix</td>
<td>+12.8%</td>
</tr>
<tr>
<td>CVS Health</td>
<td>+12.1%</td>
</tr>
<tr>
<td>Kroger</td>
<td>+7.2%</td>
</tr>
</tbody>
</table>

Source: IRI eMarket Insight, 52 WE 10/03/2021s
Among Online Purchasers of Cleaning Products, Home Delivery Is the Top Fulfilment Method

86% of Respondents Purchase Cleaning Products In-Store

Base = Those who shop online for cleaning products, n = 80
Source: IRI Survey representing Total U.S. Primary Grocery Shoppers fielded among the National Consumer Panel August 6-10, 2021
Awareness and Search Are Key Online Shopping Elements; Target Shoppers with Simple Language & Beneficial Attributes

In addition to search, click & collect, or home delivery makes a great new product sampling platform.

Shopping behaviors during last online shopping experience of those who shopped for groceries online in the past two months:

- 59% Used **search tool** to type name of a specific item
- 35% Used **category menus** to browse options in a category
- 32% Accessed **pre-purchased items** and reordered from that list
- 29% Checked for **sale items** before purchasing
- 12% Looked for **new items** to try

Direct-to-Consumer Brands Are on the Rise; Some Are Making the Leap to Retail Stores

Direct-to-Consumer Brands Available in Stores

**Grove**
Natural Cleaning Home and Personal Care
Target

**clean cult**
Detergent and Cleaning With Paper and Glass Packaging
Grocery, Drug, Kohl’s

**9 Elements**
Vinegar-Powered Cleaning
Grocery, Drug, Mass

**Safely™**
Plant-Based
Bed Bath & Beyond

**Honest**
Reusable Packaging
Grocery, Club, Mass

**Squeak**
Nontoxic Cleaning just got safer.
Specialty Retail

**Direct-to-Consumer Brands**

**Blueland**

**Defunkify**

**E-Cloth**

**Puracy**

**The Laundress**

**Force of Nature**

**Public Goods**

Source: IRI Market Advantage POS Multi Outlet, Total Dollar Sales to Date Ending 05-23-21
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Sales of Some Key Sustainably Marketed Brands Saw Significant Growth During the Pandemic

Sustainable and equitable cleaning products.

+$61.2MM  +35.7%

Powerful cleaners for a safer home and planet.

+$4.0MM  +666.5%

Naturally derived, biodegradable, non-toxic household cleaners, laundry supplies, personal care and soap.

+$29.3MM  +25.8%

Household cleaners are earth-friendly and made with plant-derived ingredients and essential oils.

+$38.7MM  +36.8%

Source: IRI Market Advantage, MULOC, 52WE 12/27/20
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Many Sustainably Marketed Cleaning Products Command a Price Premium by Category

2018 Sustainability-Marketed Products’ Price Premium / Discount by Category

Source: IRI and NYU’s Stern Center for Sustainable Business
Generations Have Their Own Sustainability Priorities

- Minimizing Carbon Footprint / Greenhouse Gases
- Minimizing Exploitation of Natural Resources
- Commitment to Conservation
- Commitment to Using Renewable Resources

<table>
<thead>
<tr>
<th>Generation</th>
<th>Minimizing Carbon Footprint/Greenhouse Gases</th>
<th>Minimizing Exploitation of Natural Resources</th>
<th>Commitment to Conservation</th>
<th>Commitment to Using Renewable Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>MILLENNIALS</td>
<td>54%</td>
<td>49%</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>BOOMERS / GEN X</td>
<td>46%</td>
<td>43%</td>
<td>28%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Source: NCP Survey; May 2021
Implications for the Home Care Market

- Pandemic cleaning behaviors continue to stick. Marketers have an opportunity to promote additional cleaning regimens, especially for areas such as doorknobs and light switches. Seek to inform, not scare.
- Direct-to-consumer options encourage subscription and replenishment; many benefit from “telling their story” and promoting transparency and benefits.
- Consumers will gravitate toward convenient solutions; multi-benefit products are often perceived as convenient.
- Tap into the self-care trend as consumers perceive a clean home to be a healthy home.
- Sales growth of sustainably marketed products outpace conventionally marketed products. Carbon labeling is on the rise.
- Consumers demonstrate a willingness to pay a premium for sustainable products. Demonstrate effectiveness of cleaning products and promote the benefits that matter most to target audience.
- Sustainability encompasses economic, social and environmental challenges; and the importance of each varies by generation. Target audiences with messaging that resonates.
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Registered Users Get New Thought Leadership from IRI’s Research, Data & Analytics Experts
IRI Thought Leadership Delivers Insightful, Provocative Insights

C-Suite Conversation Series on COVID-19-Related Topics
15 conversations recorded to date!

Industry-Leading Client Engagement and Thought Leadership, Reshaping How Our Client Executives Perceive Us
40+ reports published to date!