



Household Cleaning Needs Increase When Children Arrive

A MADISON INSIGHT REPORT
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Executive Summary BY MICHELLE BOCCUZZI

The change point around having a child creates a significant opportunity for marketers selling household cleaning products. To maximize return on investment, marketers need to focus their communications around new and young parents.

Parents are busy taking care of their small children, but the one thing that remains a priority is a clean house. With children, cleaning priorities change. There are more spills, more stains and more odors. And also more laundry. Almost half of the respondents of our recent survey said since the birth of their last child they are cleaning more than they did before, and they also there is a significant change in the amount of laundry they are doing. This trend carries on through a child's early years, making these years especially valuable for brands that establish loyalty.

The importance of good products to parents in these specific life stages is obvious. They are more concerned with disinfecting surfaces and stain-removing features and don't have the time to test products they don't know and trust. With 87% of respondents choosing prior experience with brands as the leading influencer in cleaning supply purchases, establishing brand loyalty with consumers in early stages of the birth cycle is key.

Our research also shows 81% ranked coupons as a leading purchase influencer of household cleaning supplies. This indicates key category players should tailor and deliver more discounts and coupons specifically to expectant, new and young parents.

Implication: These consumers can be swayed by coupons and other promotions – but are loyal once patterns are set. Across cleaning categories, marketers should increase their targeted communications to new and young parents.

Key Findings

Parents are cleaning more since the birth of their child.

- 45% clean more
- 31% clean less
- 23% no change
- 39% are cleaning their home every day.

Coupons are three times more influential than TV advertising — When asked to pick the three most important factors considered when choosing household cleaning products, respondents said:

- 87% Prior experience with that brand
- 81% Coupon
- 65% Discount
- 26% TV Advertisement

Laundry becomes one of parent's most considerable tasks.

- 35% of respondents said they are doing laundry every day
- 49% say this is more than they did before they had a child

Convenience is key, and is driving new category and product trial.

- 71% of parents polled have tried pre-moistened household cleaning wipes.
- 63% have tried disposable mops (e.g., Swiffer)

Indicated Marketing Implications

1

Household cleaning marketers should aggressively and frequently target young parents with price incentives.

Our data indicates parents with young children clean more often, and therefore purchase cleaning products more often and use a lot of coupons. Knowing this and staying on top of these purchase trends will help marketers reach this target more effectively.

2

Marketers should keep price top of mind.

With cost-conscious parents saying they would choose one particular product over another just because of a coupon or discount incentive, utilizing these types of promotional efforts will remain an effective tactic.

3

Marketers in the laundry category should take advantage of the increased time spent on this task by new parents, and expand frequency of promotional efforts.

Parents feel the strain of cleaning more with young children. The burden of stain removal due to spit up, formula, grass, etc, greatly increases the amount of laundry and time spent doing laundry, said most parents. When asked to choose the brands most relied on for laundry and stain removal, Tide & Dreft topped the list in detergents and Bounce and Downy were favorite choices for fabric softeners. Clorox is also a popular purchase.

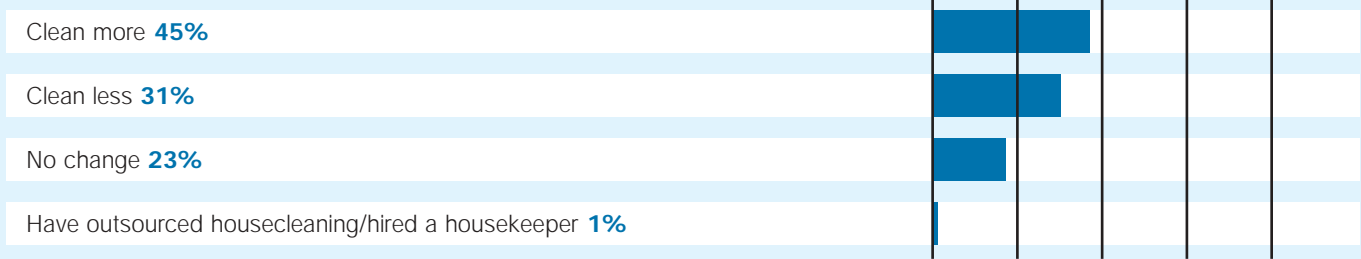
4

Marketers should develop and market time-saving and disposable products to young families to stay competitive.

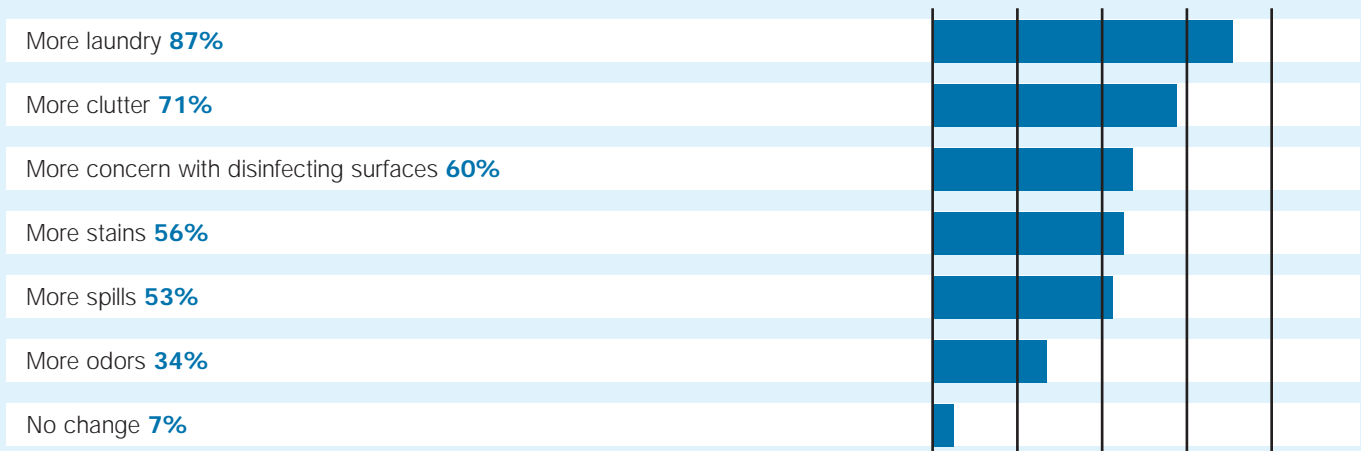
When priorities shift, parents think not only about how to clean and what to clean with, but also about how to clean quickly and efficiently so they can move on to the next task at hand. Parents are looking for products that are inexpensive and easy to use. Adoption rates on cleaning wipes and disposable mops indicates convenience products appeal to new and young parents.

Survey Results

Change in approach to household cleaning since birth of last child



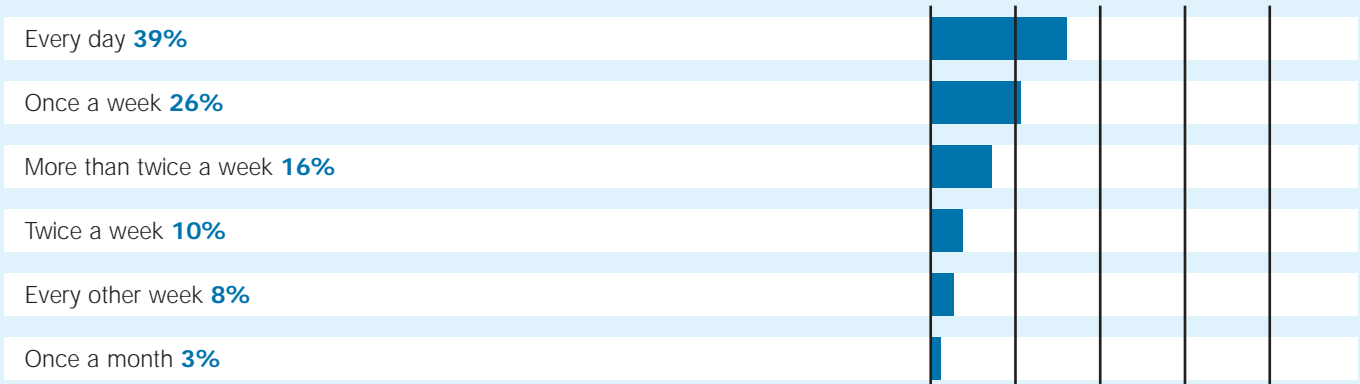
Change in cleaning priorities since birth of last child



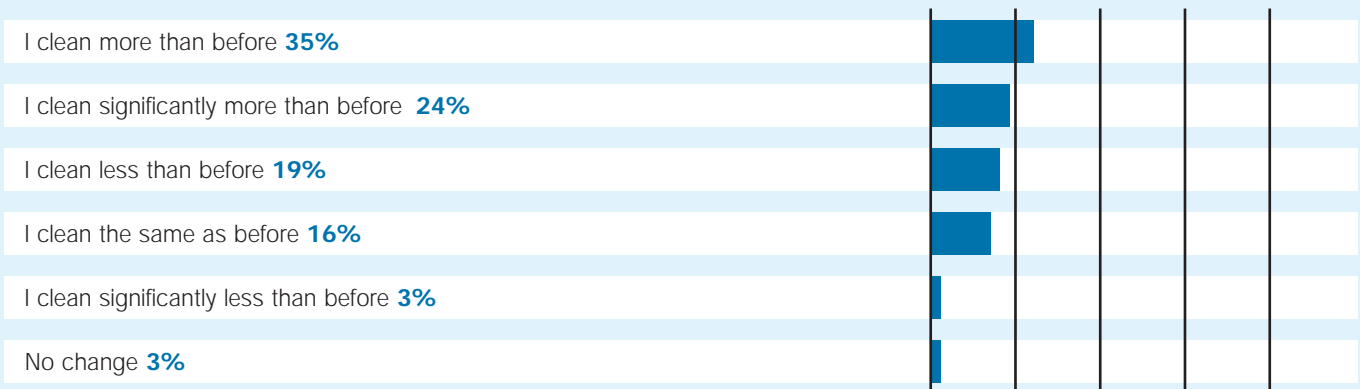
Cleaning product features needed specifically because of children



How often house cleaning occurs since the birth of last child



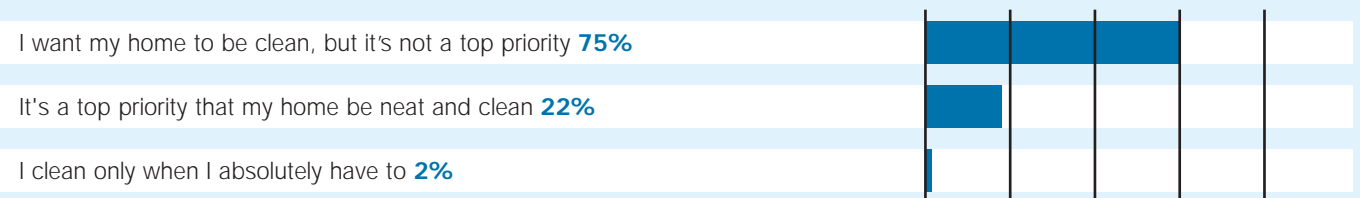
Change in time spent cleaning since birth of last child



Change in how often laundry is done since birth of last child

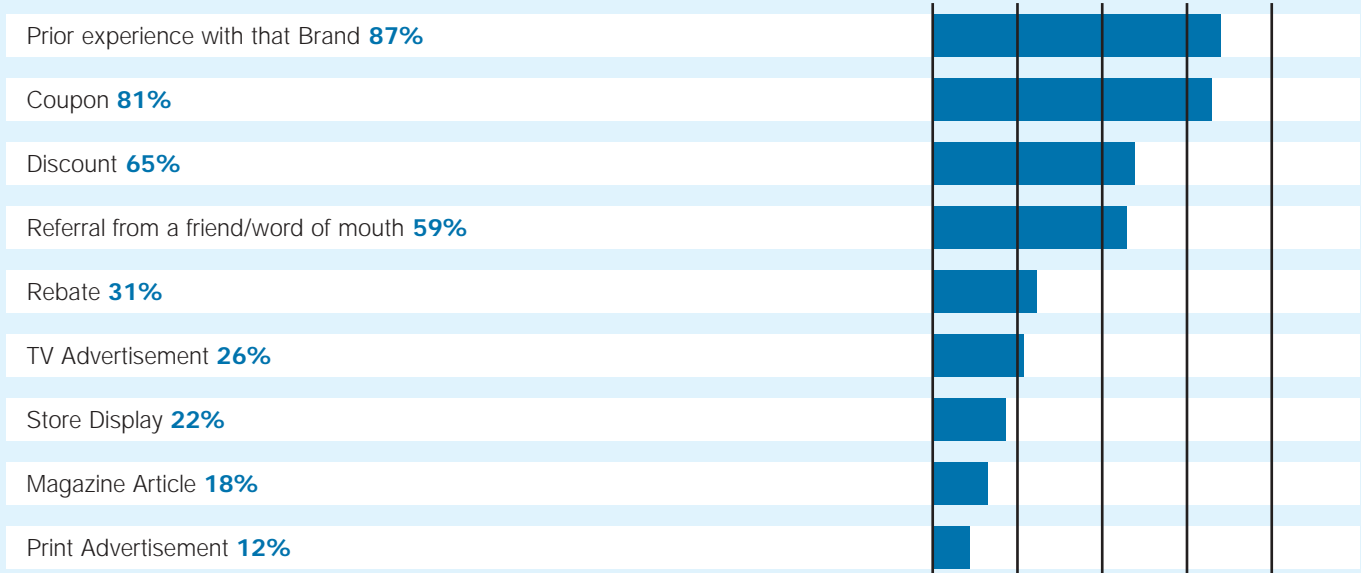


Feelings about the importance of a clean house



Survey Results (cont.)

Household cleaning supply purchasing influences



Important factors in the decision-making process when purchasing household cleaners

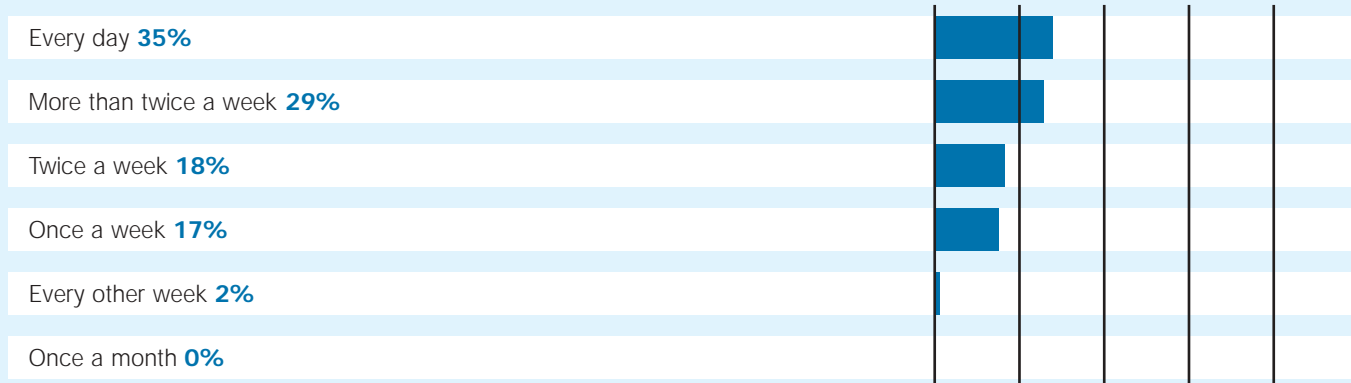


How often specific cleaning products are purchased

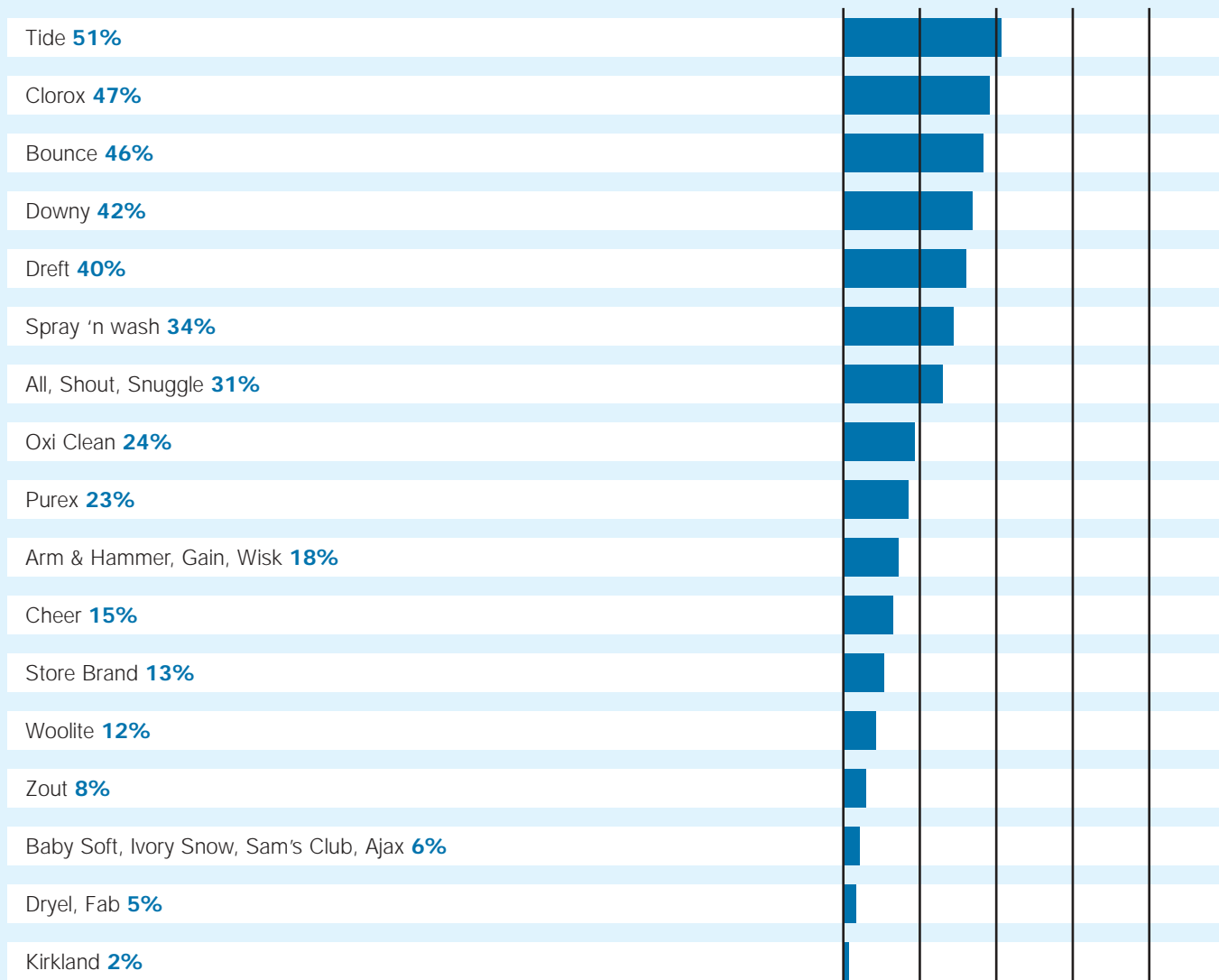
	Once a week	More than once a week	Once a month	Every few months	Never
Laundry liquid	17%	5%	47%	17%	14%
Laundry powders	4%	3%	25%	20%	48%
Stain-fighting sticks or sprays	7%	5%	32%	43%	13%
Fabric softening sheets	9%	6%	46%	27%	11%
Bleach	10%	5%	37%	41%	7%
Liquid fabric softeners	9%	5%	33%	16%	37%
Hand Dishwashing liquid	10%	12%	48%	28%	2%
Dishwasher gel/powder/tablets	12%	8%	35%	18%	33%
Antibacterial wipes	8%	10%	33%	23%	26%
Abrasive cleansers	3%	4%	24%	50%	19%
Glass cleaners	3%	4%	29%	60%	4%
Tub, tile and sink cleaners	3%	7%	38%	49%	2%
Metal cleaners	1%	2%	8%	26%	63%
Oven cleaners	2%	1%	8%	45%	45%
Rug shampoos/upholstery cleaners	2%	4%	15%	55%	23%
Toilet bowl cleaners	5%	6%	42%	43%	4%
Drain openers	1%	1%	12%	55%	30%

Survey Results (cont.)

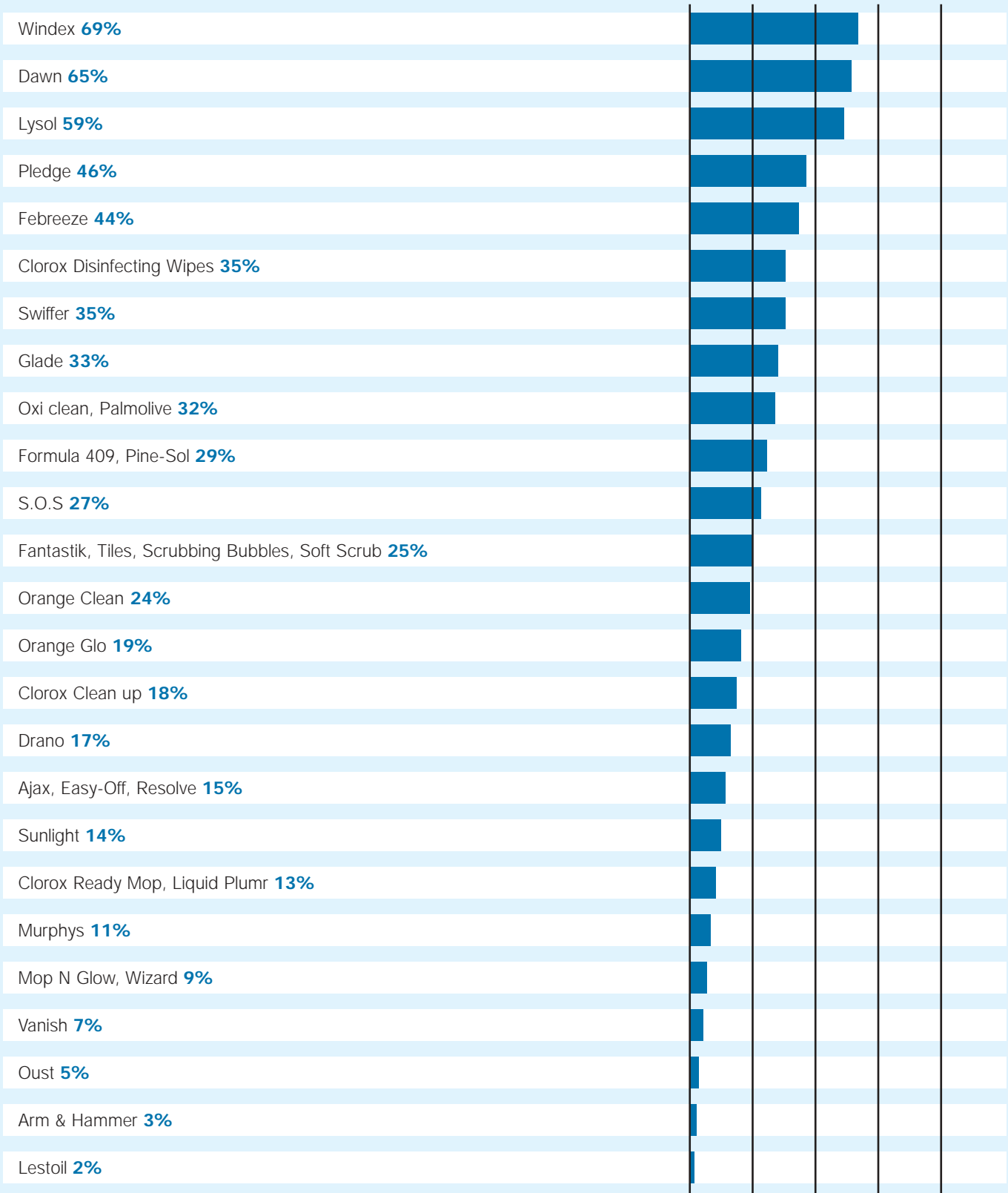
How often laundry is done with children



Laundry brands/products regularly purchased

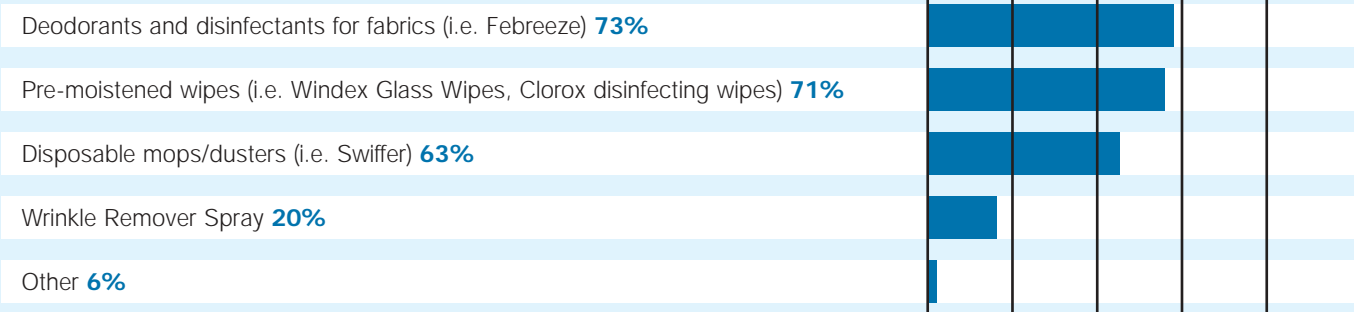


Cleaning brands/products purchased on a regular basis



Survey Results (cont.)

Use of innovative cleaning products in the past twelve months



Survey Details

This report concludes the responses of 385 recipients of Madison Direct Marketing's FamilyAdvantage branded mailers who are actively registered at www.familyadvantage.com.

Date Fielded: April 2003

Age of Respondent

25-29	30%
30-34	22%
18-24	22%
35-39	14%
40-44	7%
over 45	5%

Gender of Respondent

Female	96%
Male	4%

Number of children in household

One	49%
Two	29%
Three or more	18%
Zero	4%

Children younger than 5 in household

One	64%
Two	18%
Zero	13%
Three or more	4%

Children older than 5 in household

Zero	65%
One	21%
Two	11%
Three or more	3%

Age of youngest child

Under 6 months	32%
1-2 years	22%
6-12 months	26%
3-4 years	8%
over 6 years	8%
5-6 years	4%

About Madison Direct Marketing

Madison Direct Marketing, Ltd., a leader in life stage marketing strategy and execution for nearly 20 years, helps America's top marketers understand and reach consumers at key life stage moments when most brand, product and category decisions are made.

Utilizing proprietary databases and methods, Madison's unique direct mail, telemarketing, and online solutions enable marketers to reach and maintain targeted relationships with expectant parents, new parents, young families, Hispanic families, teens, and new homeowners. Madison also offers outsourced database and lettershop services, as well as stand-alone lists for clients' own targeted marketing efforts.

About Michelle Boccuzzi Marketing Manager

Michelle joined Madison in March of 2003 with a core focus on helping Madison clients understand industry trends and how life stage marketing can be applied to their business most effectively.

Prior to joining Madison, Michelle spent 6 years in the marketing department at Gartner, an authority on information technology research in Stamford CT, where she led several successful brand initiatives and was a recipient of several awards for her work on their corporate annual reports and distinctive print and interactive sales tools.

Her areas of expertise include corporate and brand communications and strategy, and process development and management.



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