



Ipsos Public Affairs

The Social Research and Corporate Reputation Specialists

Business Cleaning Sustainability Study

Procter&Gamble
Professional®



Nobody's Unpredictable



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Objectives and Methodology

- While a fair amount of information regarding the attitudes and behaviors of consumers on sustainability is available, this is not the case for businesses, particularly in the area of sustainability in cleaning.
- Procter & Gamble Professional has detected this lack of information and as a result commissioned Ipsos Public Affairs to conduct a national survey among business cleaning products decision makers from several industries with the objective of exploring their perceptions, attitudes and behaviors about topics related to sustainability.

Methodology

- This study was conducted online May 14-22, 2010.
- The sample consists of 428 business cleaning products decision makers based in the United States from the following industries:
 - **Foodservice: n=101**
 - **Lodging: n=100**
 - **Health Care: n=125**
 - **Commercial** (Office based buildings, Retail, Building service contractors, etc): **n=102**
- Margins of sampling error at a 95 percent confidence level would be +/- 4.7 percentage points for respondents from all industries combined if conducted using a probabilistic sample; the margin of error would be larger within sub-groupings of the survey population.
- Throughout this document total percentages may not add up to 100% due to rounding.

Executive Summary

Importance and Information About Sustainability and Environmental Responsibility

- Nine in ten of all interviewed decision makers believe sustainability and environmental responsibility is important for their business.
 - One quarter (23%) believe it is extremely important, and an additional 33% that it is very important.
- However, there appears to be a general lack of information, or at least in-depth level of information about the topic.
 - Just two in five (42%) decision makers report to be very or extremely well informed about it; and one in three (33%) report to have been confused about what it means to be green.
 - However, over four in five (85%) are at least somewhat interested in having more information on how their business can be more sustainable and environmentally responsible.

Green Cleaning Products

- While there is an interest in sustainability and environmental responsibility, when deciding which cleaning product to purchase, performance (61%) and price (52%) are by far the main two factors.
- There is confusion when it comes to “green cleaning products”:
 - Respondents seem contradictory, as majorities agree that using “green” cleaning products is only a small part of what businesses can do to be more environmentally responsible (81%), but also that it is the best way for businesses to be environmentally responsible (71%).
 - There is no consensus if when it comes to cleaning products, green and effective are mutually exclusive. Half (50%) say that cleaning products can be both effective and respectful to the environment, while close to one in three (30%) say that they are mutually exclusive, and one in five (20%) are not sure.
 - Half (51%) of decision makers report it is difficult to differentiate which products are really respectful of the environment and those that are just pretending to be.



Executive Summary... *cont'd*

Business Management and Environmentally Responsible Behaviors

- Recycling (75%) and using energy efficient light bulbs (67%) are the two main steps taken by businesses in order to be environmentally responsible.
- Similarly, out of an additional list of important actions to improve a business' environmental performance, reducing the amount of waste appears to be the most popular, mentioned by 62% of decision makers.
- Less than a quarter of all respondents (23%) report that their business has sustainability guidelines, while 63% say it doesn't, and 14% are not sure if their business does or not.
- Just under one in three decision makers (31%) say most of the cleaning products they purchase and use in their business are labeled as "green".
 - It is possible that this is in part because clients are not requesting it; four in ten decision makers (44%) say that none of their clients request the use of cleaning products that are respectful of the environment.
- Half (54%) agree that when it comes to being respectful of the environment, how cleaning products are used is more important than the products themselves.



Sub-Population Differences

Lodging

- When it comes to motivations for purchasing green cleaning products, client preferences (26%) is more important for the lodging industry than it is in the foodservice (8%), health care (10%) and commercial (11%) industries.
- Additionally corporate guidelines or CSR policies (23%) are more likely to motivate those from the lodging industry than those from the health care (9%) or commercial (8%) industries to purchase green cleaning products.
- Those from the lodging industry are more likely to choose third party certifications (21%) as an important factor when deciding if a product is respectful of the environment, than are those from the commercial (11%) and foodservice industries (10%)
- Those from the lodging industry are more than the other industries to:
 - Use energy efficient light bulbs: 80%
 - Reduce energy use: 71%
 - Conserve water: 63%
 - Purchase green cleaning products: 54%
 - Purchase energy efficient electronics: 54%
- When asked about what other actions they take in order to improve the environmental performance of their business, DMs from the lodging industry are more likely than those from the health care and commercial industries to say they systematically track the amount of water and energy (33%) and the amount of cleaning products (29%) they use in their business.

Sub-Population Differences

Commercial

- Decision Makers from the commercial industry are more likely to say they are at least somewhat well informed about sustainability and environmental responsible practices for their business (97%) than those from the lodging (90%), health care (84%) and foodservice (81%) industries.
- They are also more likely (51%) than those from the health care industry (37%) to believe it is easy to differentiate products that are really respectful of the environment from those that pretend to be.
- Just 50% of them agree with: “for my business it is more important that cleaning and disinfecting products be effective than perceived as green”; comparatively, 66% of those in the lodging industry, 72% of those in the health care industry and 76% in the foodservice industry, agree.
- Decision makers from the commercial sector are more likely than those from other sectors to report they minimize the amount of cleaning products used in their business in order to improve their environmental performance (55%).
- When purchasing cleaning products:
 - Impact on the environment (31%) is more important for the commercial industry than it is for the foodservice industry (16%) or the health care industry (13%).
 - Ease of use (31%) is also more important for the commercial industry than it is for the health care (18%), lodging (18%) and foodservice (18%) industries.
 - On the other hand, they are less likely (2%) than those from the foodservice (18%), health care (15%) and lodging (12%) industries to mention industry regulations and standards as a factor taken into consideration when purchasing cleaning products.



Sub-Population Differences

Foodservice

- Decision makers from the Foodservice industry (25%), along with the lodging industry (25%), are more likely to mention government certifications as a factor they consider when deciding if a product is respectful of the environment. Comparatively, just 13% of the health care industry does.

Health Care

- Decision makers from the health care industry are those who present the lowest interest in having more information on how their business can be more proactive in sustainability and environmental responsibility (41%); their interest is significantly lower than among decision makers from the lodging industry (55%).
- After “personal sense of responsibility” (63%), employees health and safety concerns is the most important motivator to purchase green products (57%); while not covered by the survey, their client’s health is likely to be very important as well.
- When it comes to certifying cleaning products, decision makers from the health care industry (42%) are more likely to be unsure about which entity to trust, than those from the lodging (22%) and commercial (27%) industries.

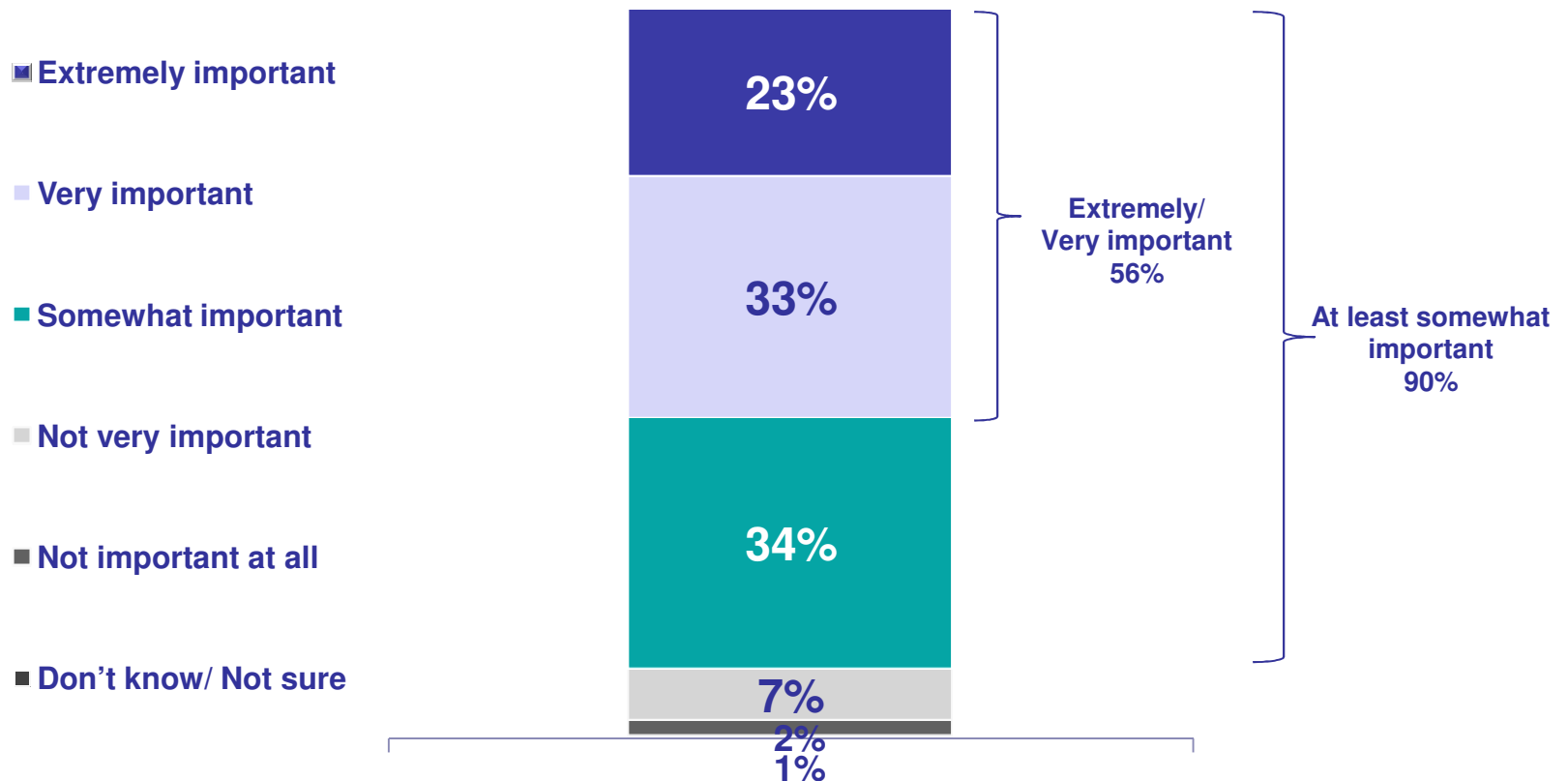
DETAILED FINDINGS

Importance and Information About Sustainability and Environmental Responsibility



Importance of Sustainability and Environmental Responsibility

- Nine in ten decision makers (90%) report that sustainability and environmental responsibility is at least somewhat important for their business.
- In fact, over half (56%) report these issues are very (33%) or extremely (23%) important.

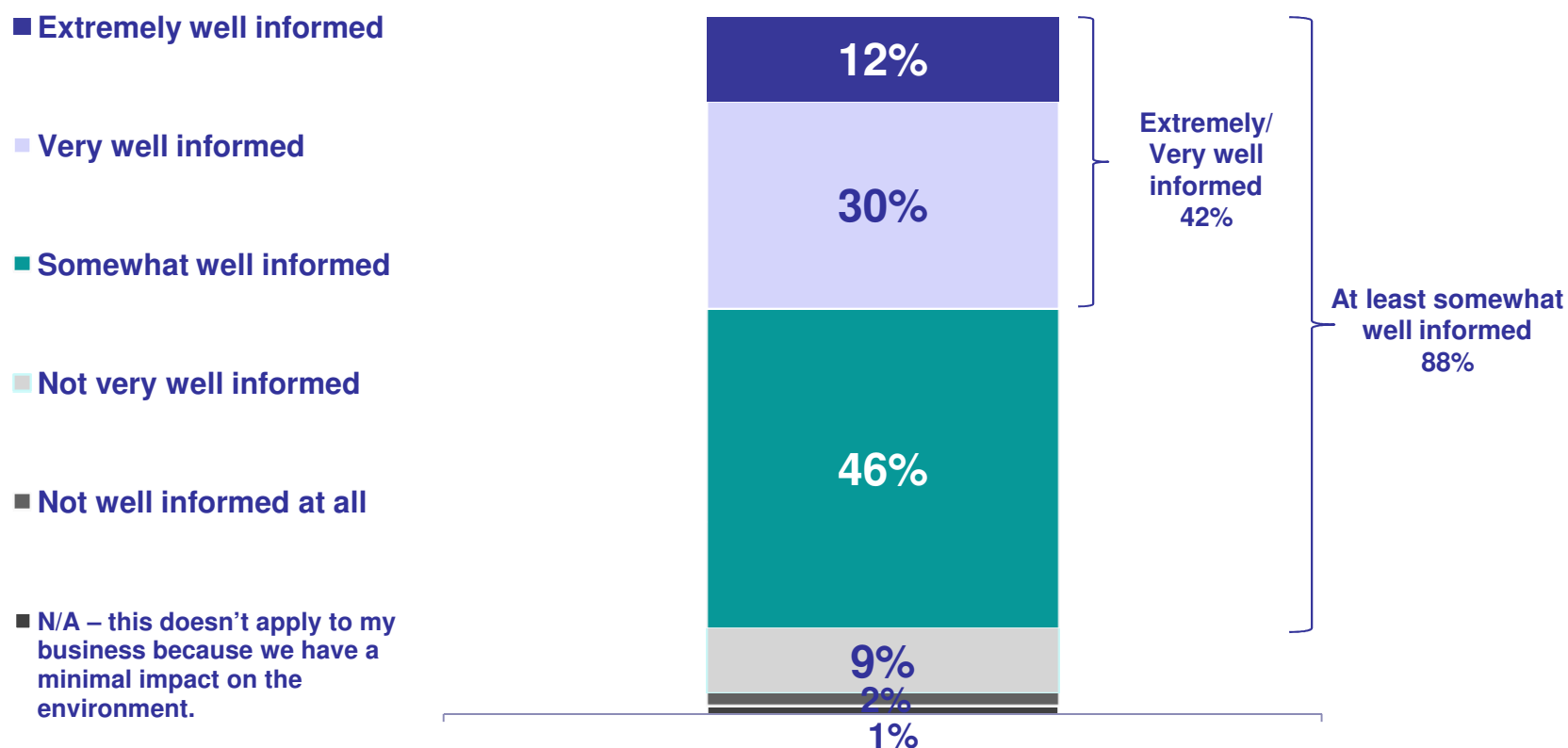


Q. How important would you say the issue of sustainability and environmental responsibility is to your business?
Base: All Respondents n=428



Information About Sustainability and Environmental Responsibility

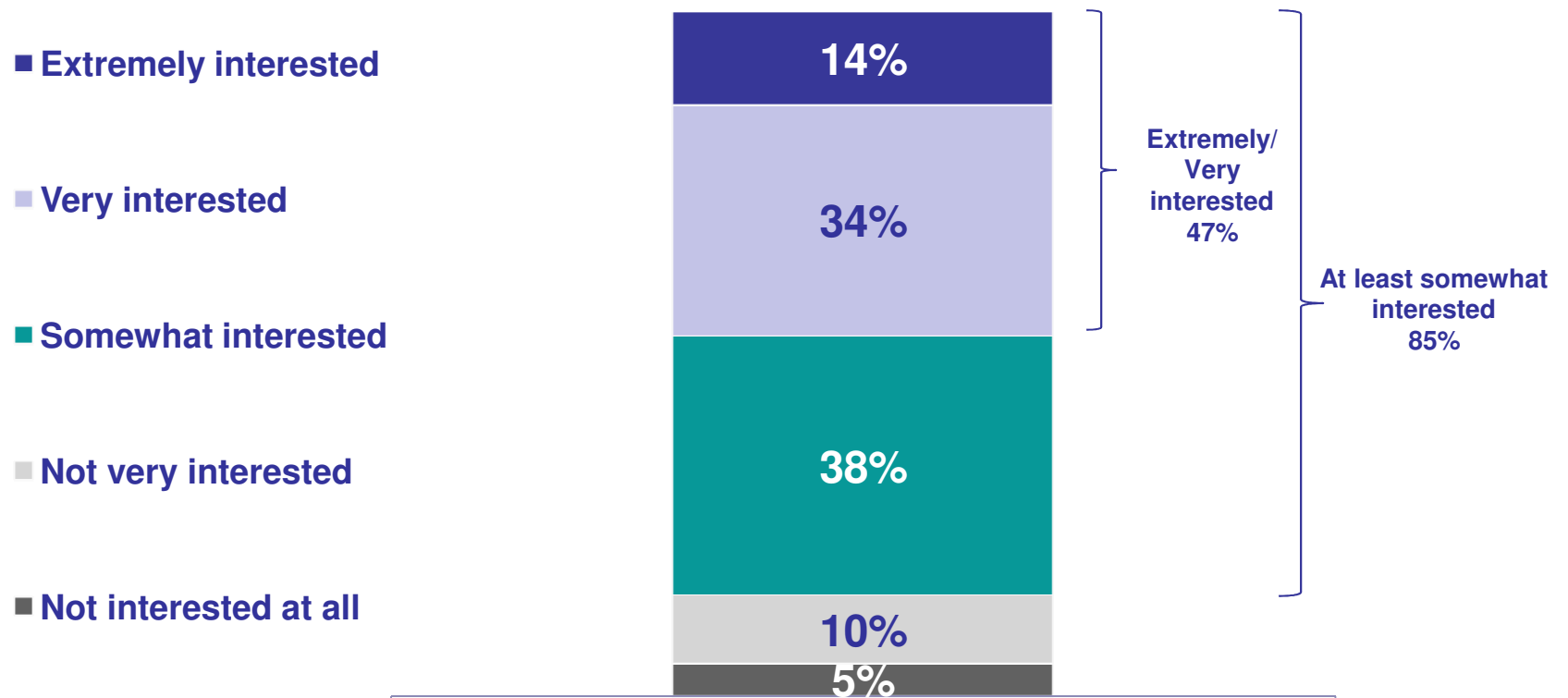
- While most cleaning decision makers (88%) report that they are at least somewhat well informed about sustainability and environmentally responsible practices for their business, just two in five (42%) report being at least very well informed, and one in ten (12%) extremely well informed.
- One in ten report being not very (9%) or not informed at all (2%).



Q. How well informed are you about sustainability and environmentally responsible practices for your business?
Base: All Respondents n=428

Interest In More Information

- Probably as a consequence of the lack of in-depth information, over four in five decision makers (85%) are at least somewhat interested in having more information on how their business can be more proactive in being sustainable and environmentally responsible.

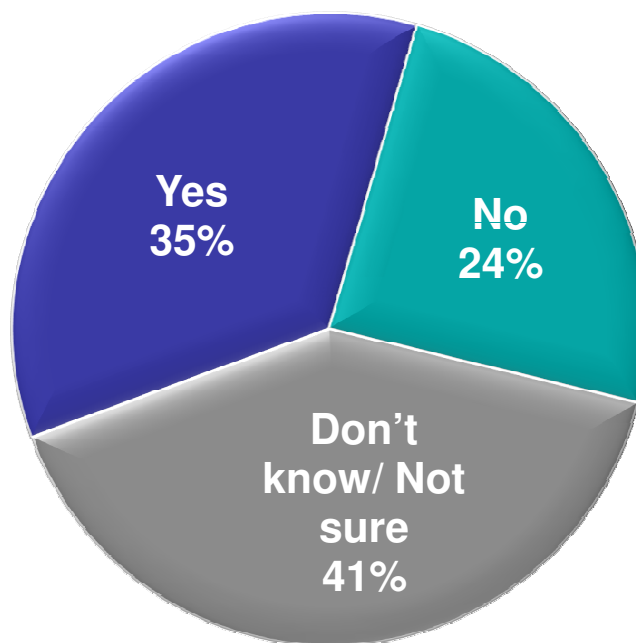


Q. To what extent would you be interested in having more information about ways for your business to be more proactive in terms of sustainability and environmental responsibility?

Base: All Respondents n=428

Authority in Sustainability

- A lack of information is also evident when respondents were asked if they believe there is a credible authority on sustainability and environmental responsibility.
- Just over one in three (35%) believe that there is, and just one in four (24%) outright answer that there is not.
- In contrast, 41% say they do not know or are not sure.

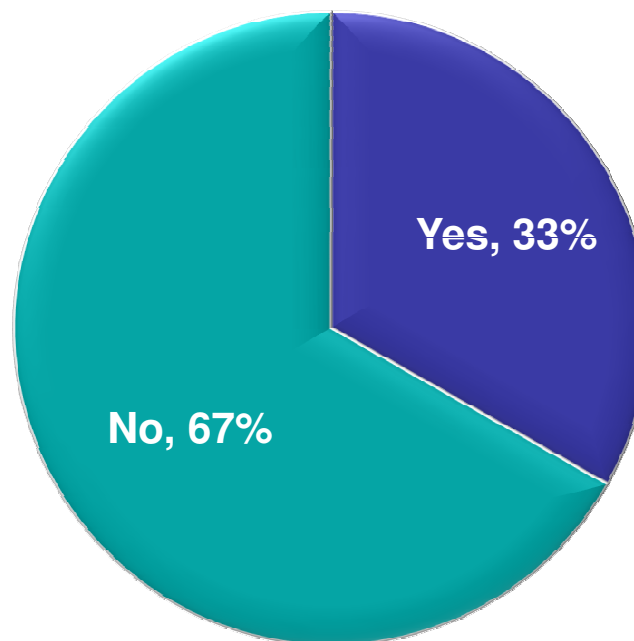


Q. As far as you know, would you say that there is a credible authority on sustainability and environmental responsibility?
Base: All Respondents n=428



Green Confusion

- There seems to be a general lack of information when it comes to sustainability and environmental responsibility among respondents.
- In fact, when decision makers were asked directly if they have ever been confused about what it means to be green, one in three said YES.



Q. Have you ever been confused about what it means to be green?
Base: All Respondents n=428

Green Cleaning Products

Motivators To Purchase Green Cleaning Products

- When it comes to the motivators for purchasing green cleaning products, over two thirds (69%) of all interviewed decision makers selected a *personal sense of responsibility*, followed by *employee health and safety concerns* (49%).
- Client preferences, regulations, or guidelines are mentioned by just around one in ten.



- Client preferences (26%) is more important in the lodging industry than it is in the foodservice (8%), health care (10%) and commercial (11%) industries.
- In addition, corporate guidelines or CSR policies (23%) are more likely to motivate those from the lodging industry than those from the health care (9%) or commercial (8%) industries.

Q. What motivates you/your business to purchase "green" cleaning products? (Select all that apply)
Base: All Respondents n=428



Environmental Responsibility and Green Cleaning Products

- Close to nine in ten decision makers (87%) agree that it is important for their businesses to find ways to reduce their impact on the environment (including 57% who *agree completely*).
- And while eight in ten agree that using “green” cleaning products is only a small part of what businesses can do to be more environmentally responsible, seven in ten (71%) also agree that it is the best way for businesses to be environmentally responsible.
- This could imply there is some confusion among decision makers regarding green products and how they relate to being environmentally responsible.

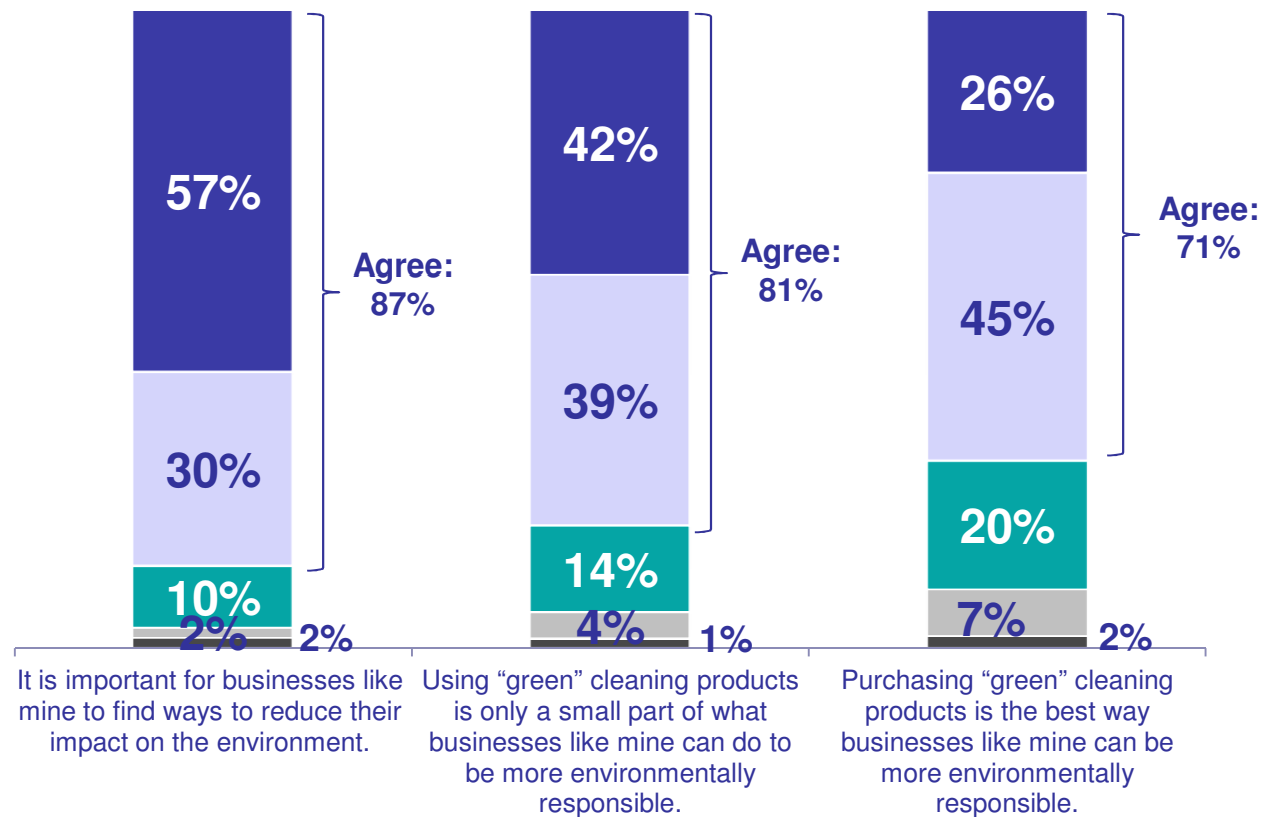
■ **Completely agree**

■ **Somewhat agree**

■ **Neither agree nor disagree**

■ **Somewhat disagree**

■ **Completely disagree**



Q. Please indicate how much you agree or disagree with each of the following statements.

Base: All Respondents n=428

Main Factors When Purchasing Cleaning Products

- Despite the interest in sustainability and environmental responsibility, performance (61%) and price (52%) are by far the top two factors impacting the decisions of businesses when it comes to purchasing cleaning products.
- Ease of use (21%), impact on the environment (20%) and chemicals and ingredients (19%) are mentioned by roughly one in five decision makers.

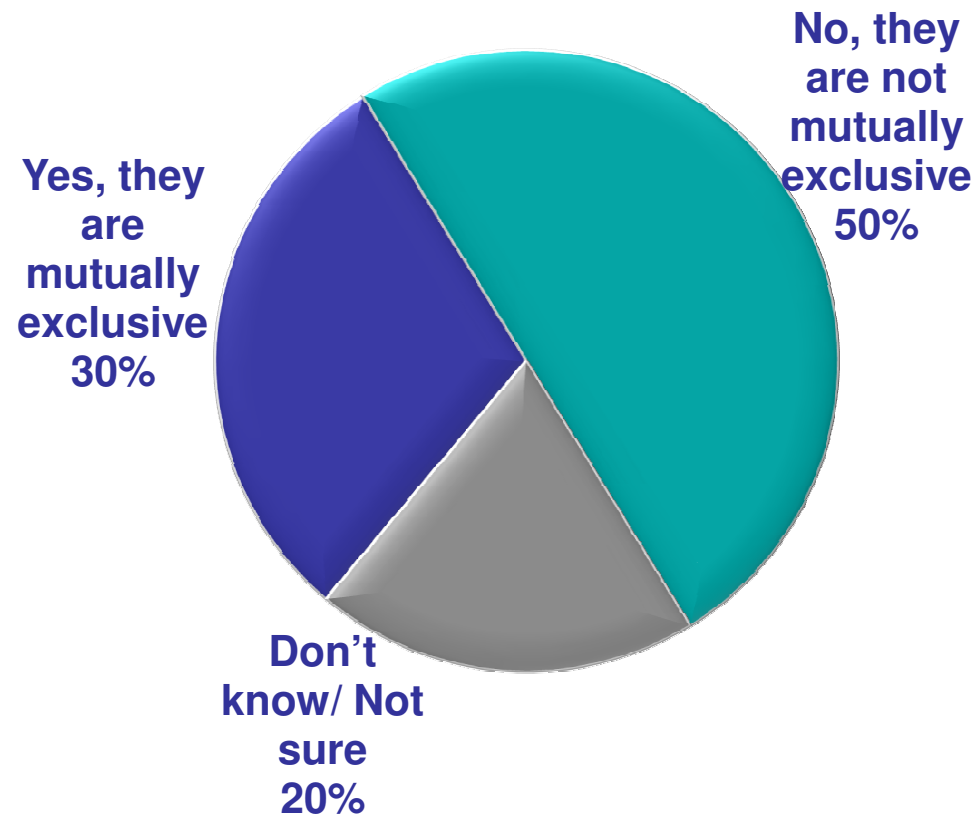


- Ease of use (31%) is more important for the commercial industry than it is for the health care (18%), lodging (18%) and foodservice (18%) industries.
- Impact on the environment (31%) is more important for the commercial industry than it is for the foodservice industry (16%) or the health care industry (13%).

Q. Which among these factors are the two (2) most important to you and your business when purchasing cleaning products? (Please select two)
Base: All Respondents n=428

Effective vs. Green

- While half (50%) of all interviewed decision makers say that cleaning products can be both effective and respectful to the environment, close to one in three (30%) say that when it comes to cleaning products, being effective and green are mutually exclusive, while one in five (20%) are not sure.



Q. When it comes to cleaning products, would you say that effectiveness and being respectful of the environment are mutually exclusive?
Base: All Respondents n=428

Ease To Differentiate Green Products

- With the wide variety of green products, seals, labels and green standards currently available on the market, half of decision makers report that it is difficult to differentiate which products are really respectful of the environment and those that are just pretending to be.

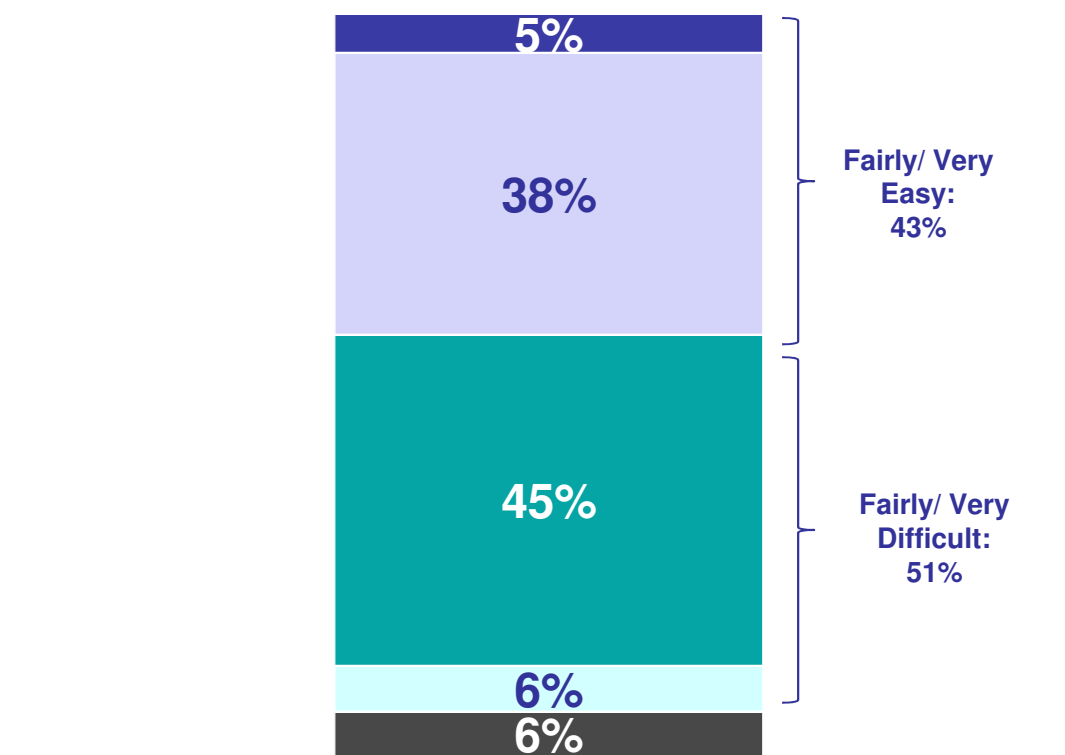
■ **Very easy**

■ **Fairly easy**

■ **Fairly difficult**

■ **Very difficult**

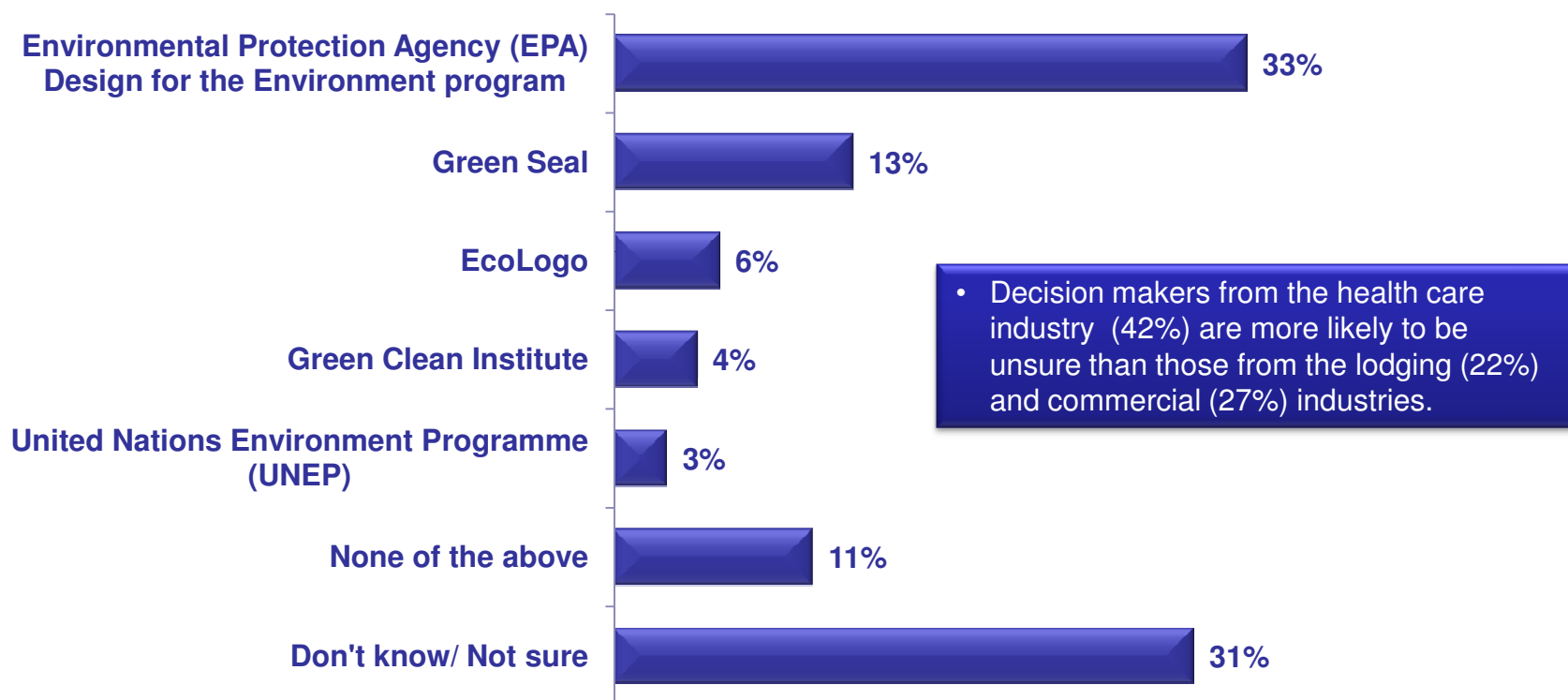
■ **Don't know/ Not sure**



Q. There is a wide variety of green products, seals, labels and green standards currently available on the market. Please indicate to what extent do you think it is easy or difficult to differentiate which ones are really respectful of the environment and which ones are just pretending to be? Base: All Respondents n=428

Trust In Entities

- Mentioned by one in three respondents, the *Environmental Protection Agency Design for the Environment* program is by far the most trusted entity when it comes to certifying cleaning products.
- However, close to one third (31%) reported not being sure, and one in ten (11%) that they would not trust any of the entities included in the research (included in the graph below).



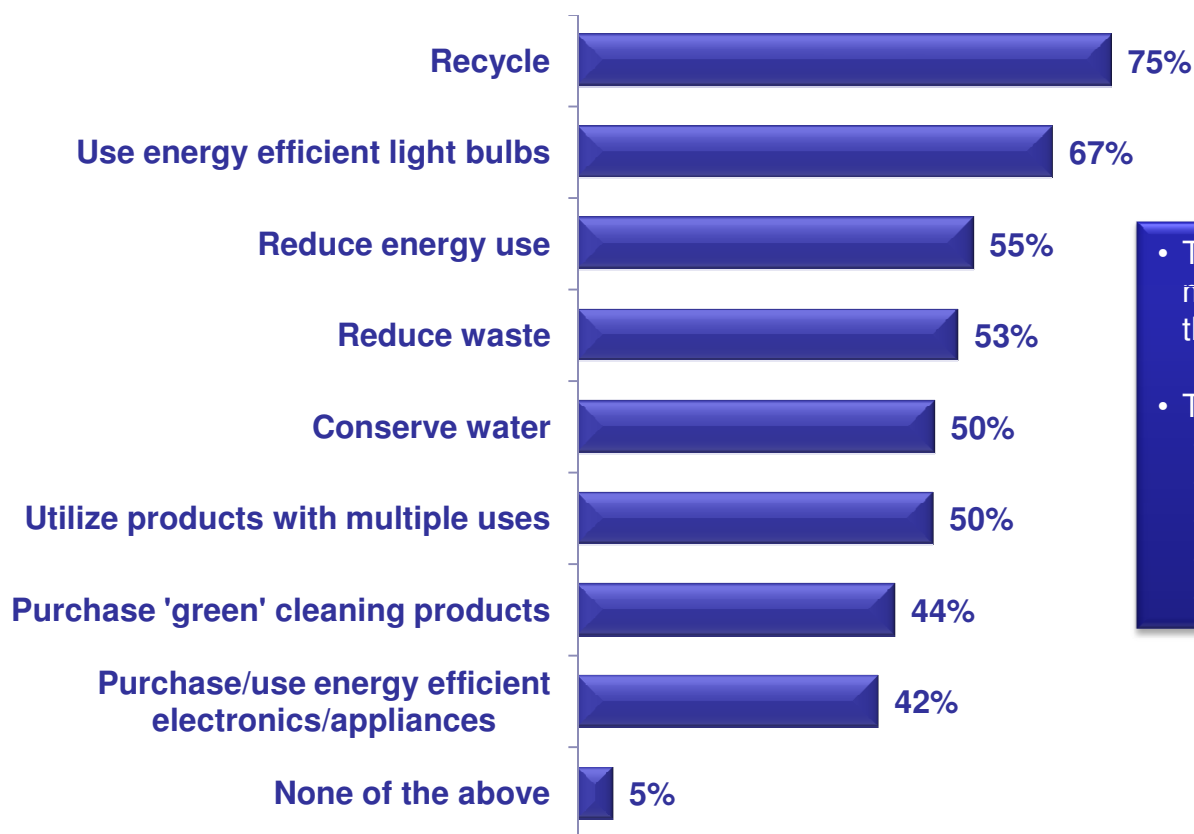
Q. When it comes to certifying cleaning products, which of the following entities do you trust the most? (Please select one)
 Base: All Respondents n=428

Business Management and Environmentally Responsible Behaviors



Business' Environmentally Responsible Behaviors

- Most businesses rely on recycling and using energy efficient light bulbs in order to be environmentally responsible.
 - Three quarters of decision makers say their business recycles and two thirds that they use energy efficient light bulbs in order to be environmentally responsible.
- A lower proportion (about half), say they reduce energy use (55%), reduce water (53%), conserve water (50%) and utilize products with multiple uses (50%).



- The lodging industry tends to behave in a more environmentally responsible way than the other three industries surveyed.
- They are more likely to:
 - Use energy efficient light bulbs: 80%
 - Reduce energy use: 71%
 - Conserve water: 63%
 - Purchase green cleaning products: 54%
 - Purchase energy efficient electronics: 54%

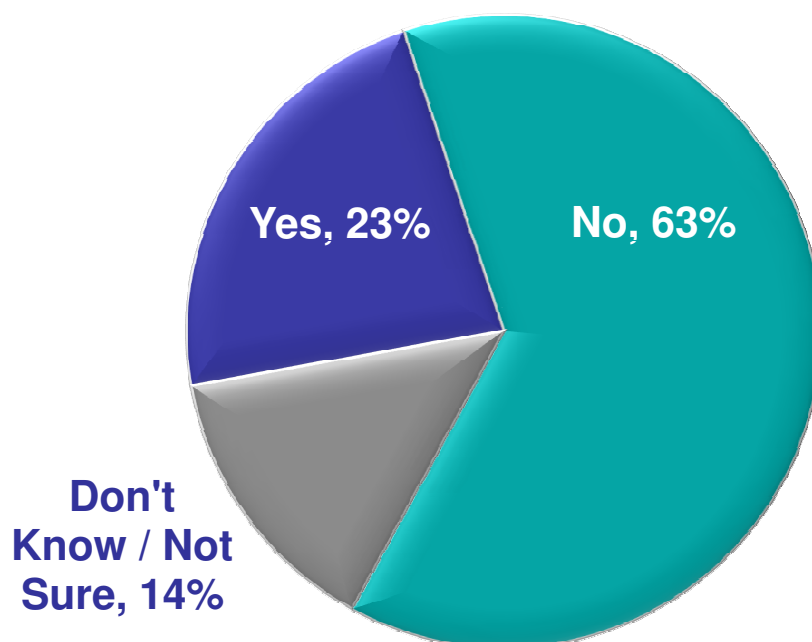
Q. Does your business do any of the following to try to be environmentally responsible? (Please select all that apply.)

Base: All Respondents n=428



Sustainability Guidelines

- Just under one in four decision makers (23%) say that their business has sustainability guidelines.
- While 63% say their business does not have them, and 14% of them don't know or are not sure.



- Those from the lodging industry (30%) are more likely than those from the health care (18%) and commercial (17%) industries to say their business has sustainability guidelines.

Q. Do you have sustainability guidelines for your business?
Base: All Respondents n=428



Proportion Of Purchased and Used Green Cleaning Products

- Close to one in three decision makers (31%) report that most of the cleaning products they purchase and use in their business are labeled as “green” – *including 5% who say all the products they purchase and use are “green.”*
- One third of them (36%) report that some of the products they purchase and use in their business are labeled as “green.”
- Finally, one quarter report that a few (19%) or none (7%) of the products purchased and used in their business are “green.”



- Those from the lodging (31%) and commercial (34%) industries are more likely to report that most of the cleaning products they purchase and use are labeled as “green.”
- On the other hand, those from the foodservice (28%) and health care (22%) industries are more likely to report that just a few of the cleaning products they purchase and use are “green.”

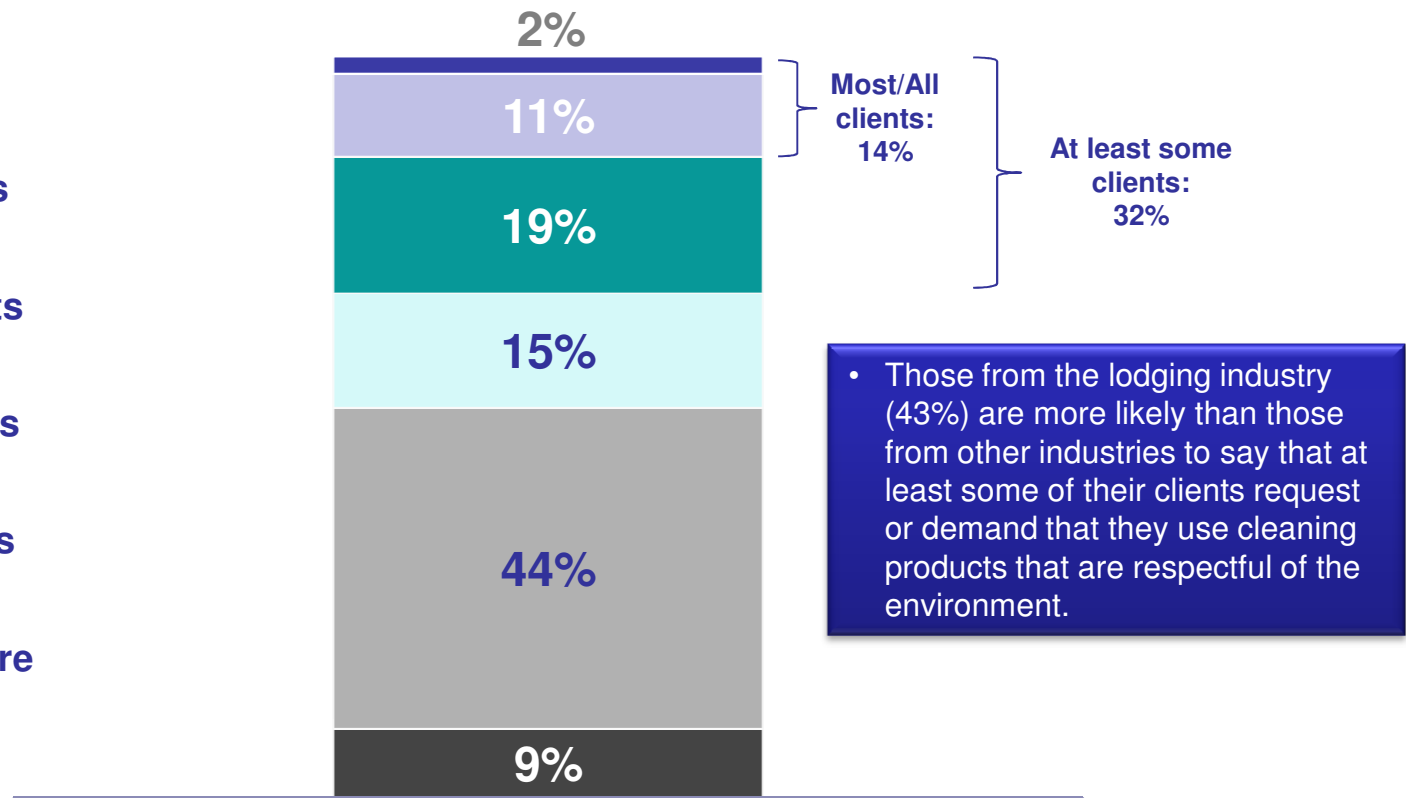
Q. What proportion of the cleaning products you purchase and use in your business are labeled as “green”?
Base: All Respondents n=428



Proportion Of Clients Requesting Green Cleaning Products

- Over two in five decision makers (44%) report that none of their clients request or demand the use of cleaning products that are respectful of the environment.
- One third (32%) report that at least some of their clients do – *including just 11% who say most of their clients request or demand the use of these products, and 2% who say they all do.*

- All of your clients
- Most of your clients
- Some of your clients
- A few of your clients
- None of your clients
- Don't know/ Not Sure



Q. What proportion of your clients request or demand that you use cleaning products that are respectful of the environment?
Base: All Respondents n=428

Holistic Green Approach

- Two thirds of all interviewed decision makers agree that for their business it is more important that cleaning and disinfecting products be effective than perceived as green.
- Over half (54%) agree that when it comes to being respectful of the environment, how cleaning products are used is more important than the products themselves.
- Over half also say that while they want to choose environmentally-friendly cleaning products and services for their business, they often end up choosing ones that aren't.
- A similar proportion (49%) say they tend to trust products from well known companies more than they do products with eco-seals.

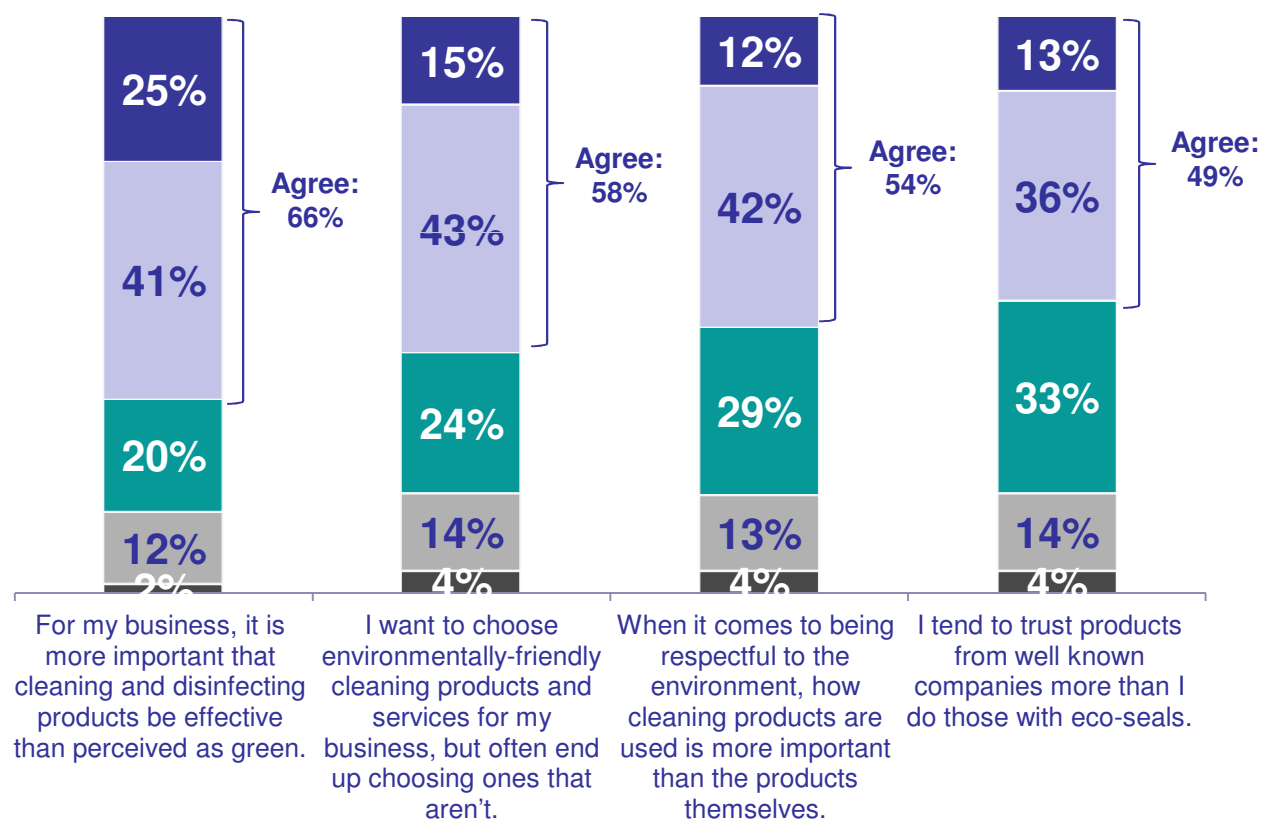
■ **Completely agree**

■ **Somewhat agree**

■ **Neither agree nor disagree**

■ **Somewhat disagree**

■ **Completely disagree**

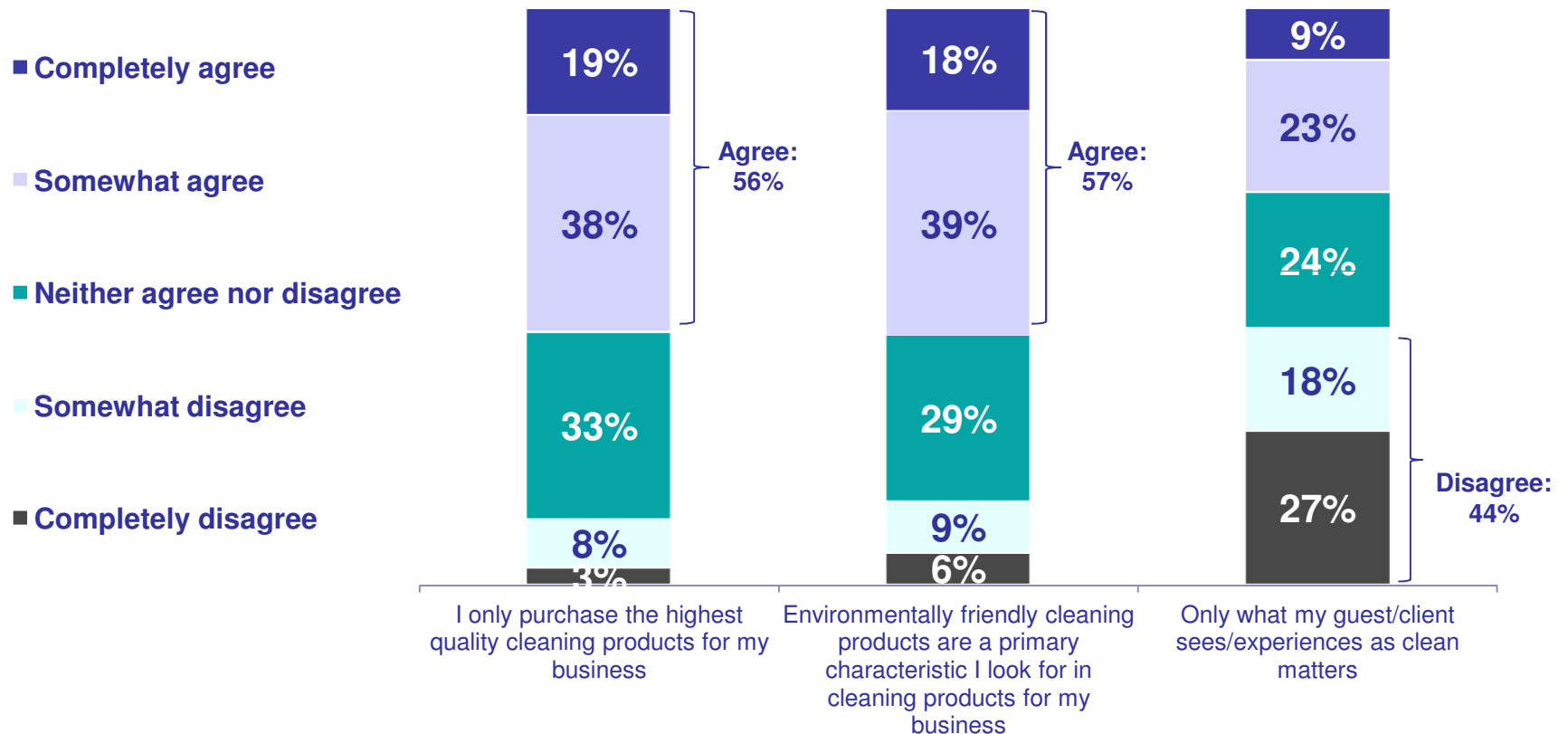


Q. To what extent do you agree or disagree with each of the following statements?

Base: All Respondents n=428

Green Business Approach

- Over half of the decision makers interviewed report that they only purchase the highest quality cleaning products for their business (57%).
- A similar proportion agree that being environmentally friendly is a primary characteristic they look for in cleaning products for their business (57%).



Q. To what extent do you agree or disagree with each of the following statements?
Base: All Respondents n=428



Additional Actions To Improve Environmental Performance

- From a list of six key actions, most decision makers (62%) report that their business is reducing the amount of waste in order to improve their environmental performance.
- Two in five report minimizing the amount of cleaning products used in their business (42%) and training and encouraging their employees to incorporate sustainable thinking into their daily work (40%).
- Around one in five report systematically tracking the amount of water and energy (23%) and the amount of cleaning products (20%) being used in their business.



- Decision makers from the commercial sector are more likely than those from other sectors to report they minimize the amount of cleaning products used in their business in order to improve their environmental performance (55%).
- Those from the lodging industry are more likely than those from the health care and commercial industries to say they systematically track the amount of water and energy (33%) and the amount of cleaning products (29%) they use in their business.

Q. Which of the following do you do in your business in order to improve your environmental performance? (Please select all that apply)
Base: All Respondents n=428



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