



Ipsos Reid

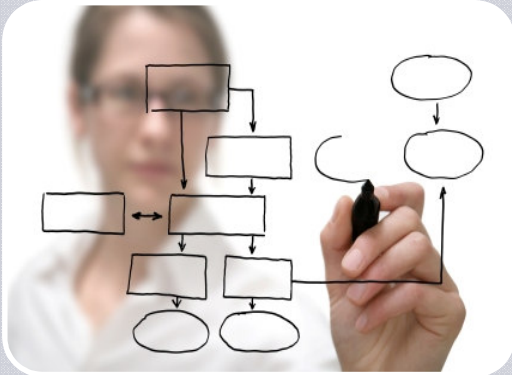
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Cleaning Industry Insights Survey



Nobody's Unpredictable

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Economic climate, cost efficiency and effective cost cutting, managing and training cleaning staff, product purchase, elements of cleaning

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Objectives & Methodology

Objectives

- Procter & Gamble Professional commissioned Ipsos Public Affairs to conduct a national survey among managers of cleaning operations from several industries with the objective of exploring their perceptions, attitudes and behaviors about their business and how they are adapting to the challenges brought on by the current economic climate.

Methodology

- This study was conducted online June 15-20, 2011.
- The sample consists of 400 managers of cleaning operations based in the United States from the following industries:
 - Food Service (n=100)
 - Hospitality/ Lodging (n=100)
 - Commercial (n=100)
 - Healthcare (n=100)
- Throughout this document total percentages may not add up to 100% due to rounding.



Executive Summary

- Decision-makers are feeling the pressure from the economic climate and are responding accordingly: most feel they have been effective at *keeping their operating costs down* over the last 12 months. Their *businesses have cut back* in a number of areas, including stocking of office supplies, staff perks and benefits, inventory, and resources.
- Finding *ways to become more efficient* is the preferred course of action to improve the bottom line. A majority feel their business is somewhat efficient but there remains some room for improvement, with only one in four rating themselves as extremely efficient with their cleaning operations.
- Ultimately, the most important business factors are to *keep current customers happy*, attract new customers and remain vigilant with *efficient use of current resources*.
- Operations are *doing more with less* by relying heavily on fewer staff resources and using more efficient, multiuse cleaning products.



Executive Summary

- Maintaining *top quality work* and employee turnover are among the biggest challenges of managing a cleaning staff, which also feed into concerns with *training*. Most agree that employers are responsible for training the cleaning staff, with one-on-one and on-the-job training as the most effective means of training. The *challenges of effective cleaning-related training* are more difficult to pinpoint, as decision-makers across four sectors are concerned about the cost of training, the loss of work productivity, language differences, and the availability of qualified training.
- Respondents are looking for *product performance* and *price* when making a decision about purchasing cleaning products, defining value by *product quality* and *versatility of use*. Getting the job done the first time is the most important factor in assessing quality.



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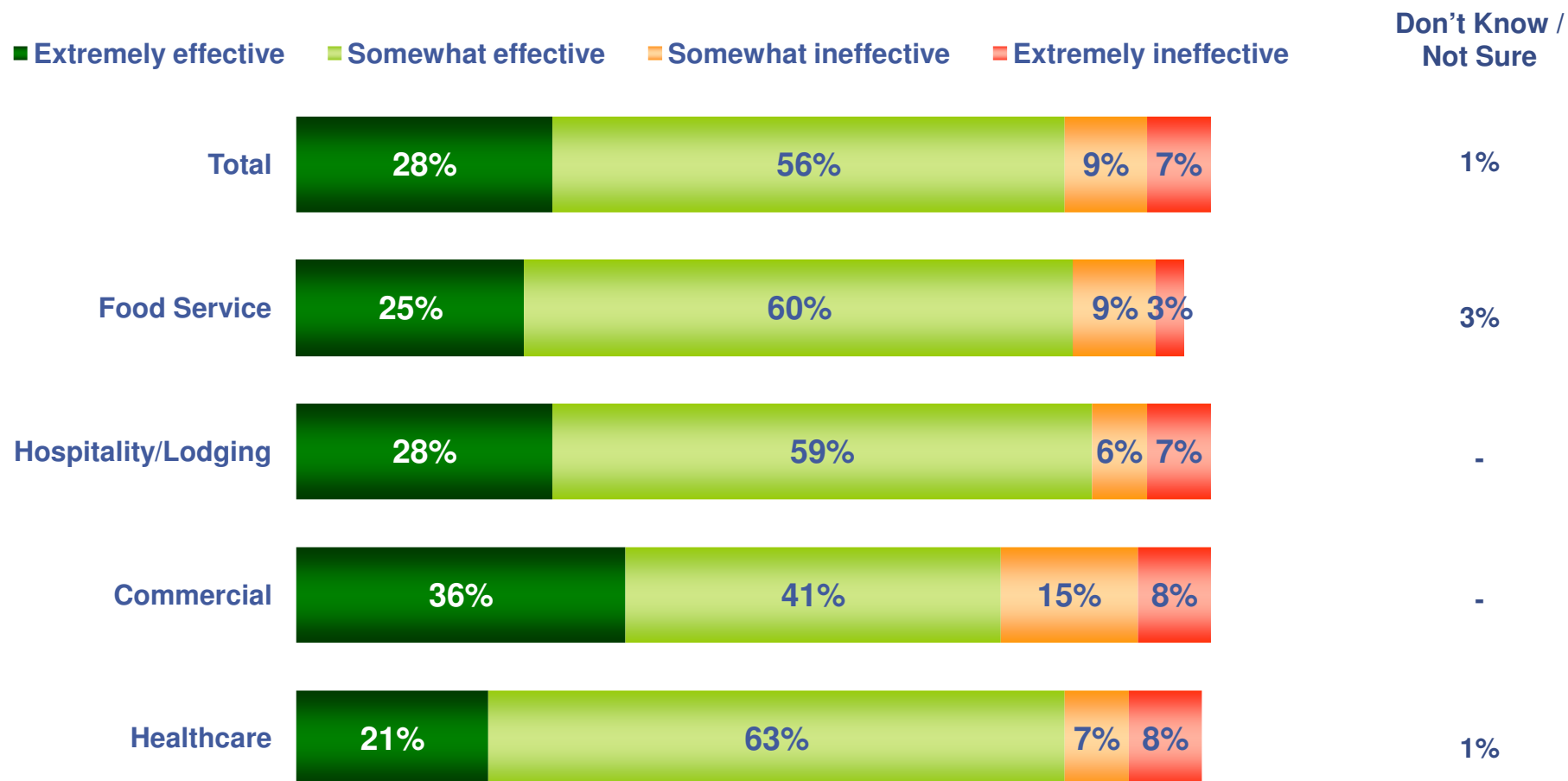
Detailed Findings





Effectiveness of business in keeping operations costs down in past 12 months

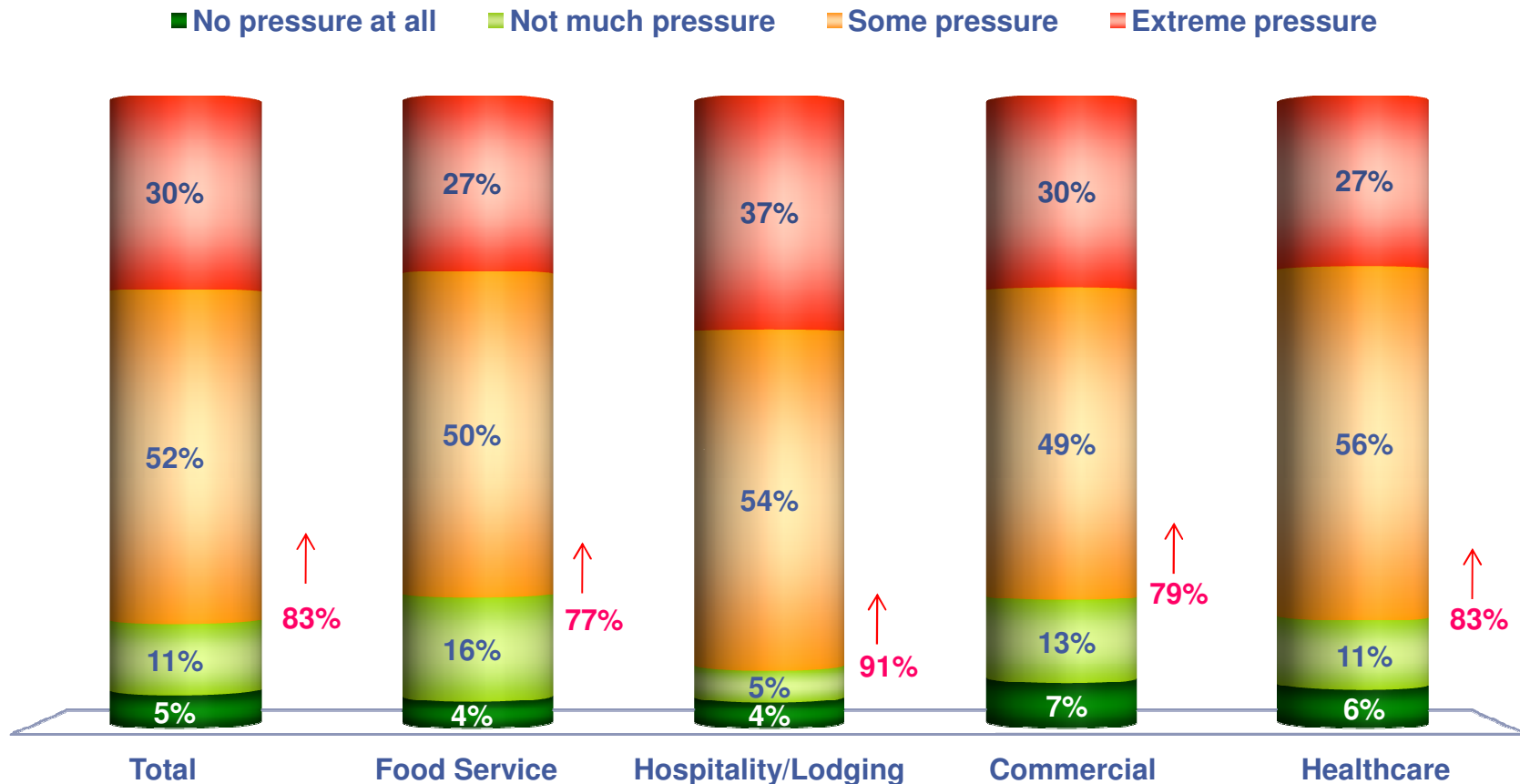
Most respondents (84% overall) rate their business as somewhat or very effective at keeping operations costs down in the past 12 months. The commercial sector presents the most polarized opinions, with the highest proportions indicating very effective (36%), as well as somewhat or very ineffective (23%) at keeping operating costs down.





Level of pressure felt to keep operating costs down

The measure of effectiveness runs parallel to the amount of pressure being felt to keep operating costs down. Overall, 3 in 10 respondents feel extreme pressure to keep operating costs down, and over three-quarters at least some pressure. The proportion of those who feel extreme pressure is notably higher among the food service industry.



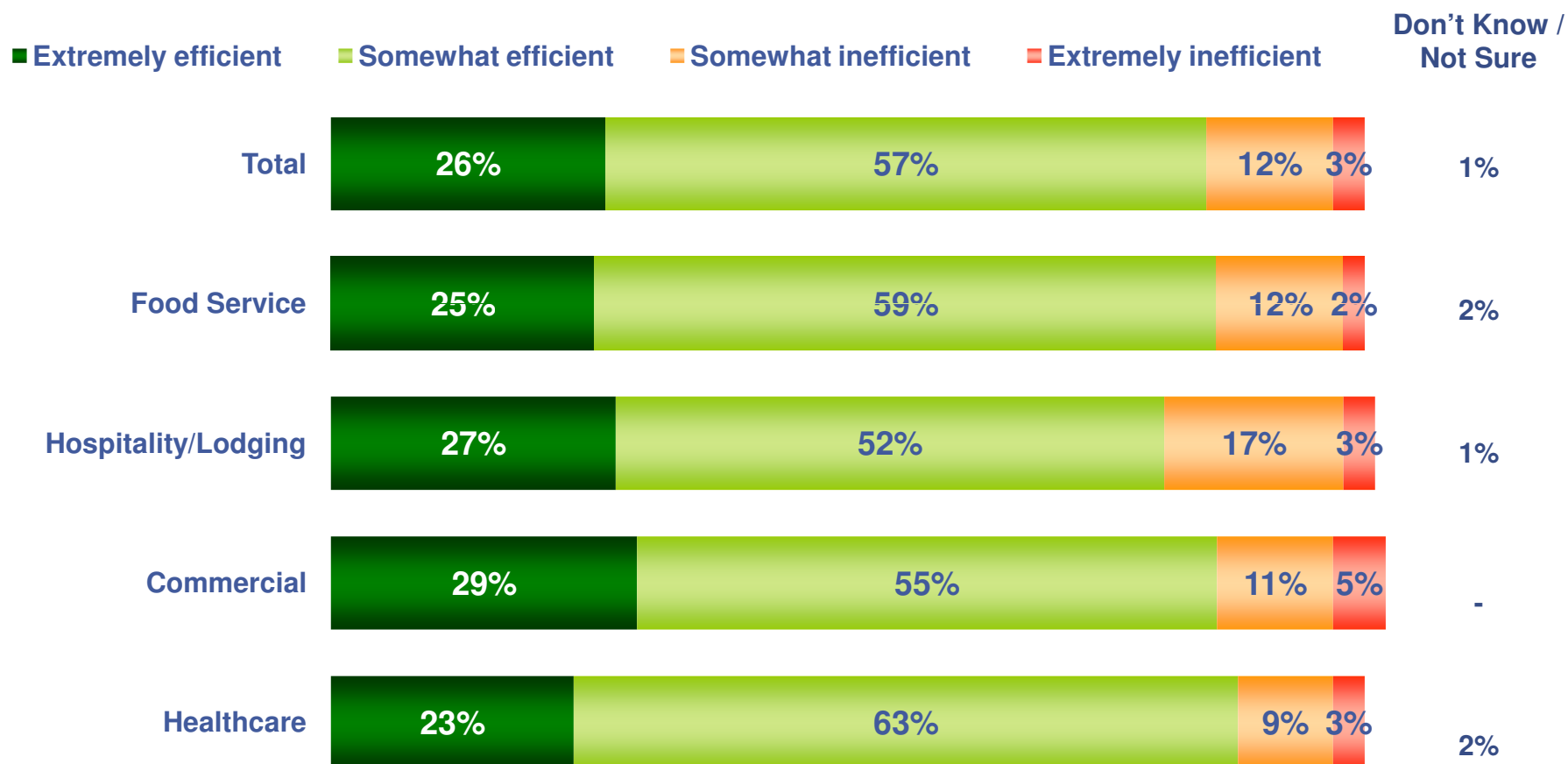
Q6. How much pressure have you or the people you report to been under to keep operating costs down over the last 12 months? Would you say you or they have been under ...?

Base: All Respondents (n=400); Each industry group (n=100)



Efficiency of business' cleaning operations over the past 12 months

Across all four sectors, a strong majority of respondents indicate their business is efficient with their cleaning operations. With one in four describing their cleaning operations as very efficient in the last 12 months.

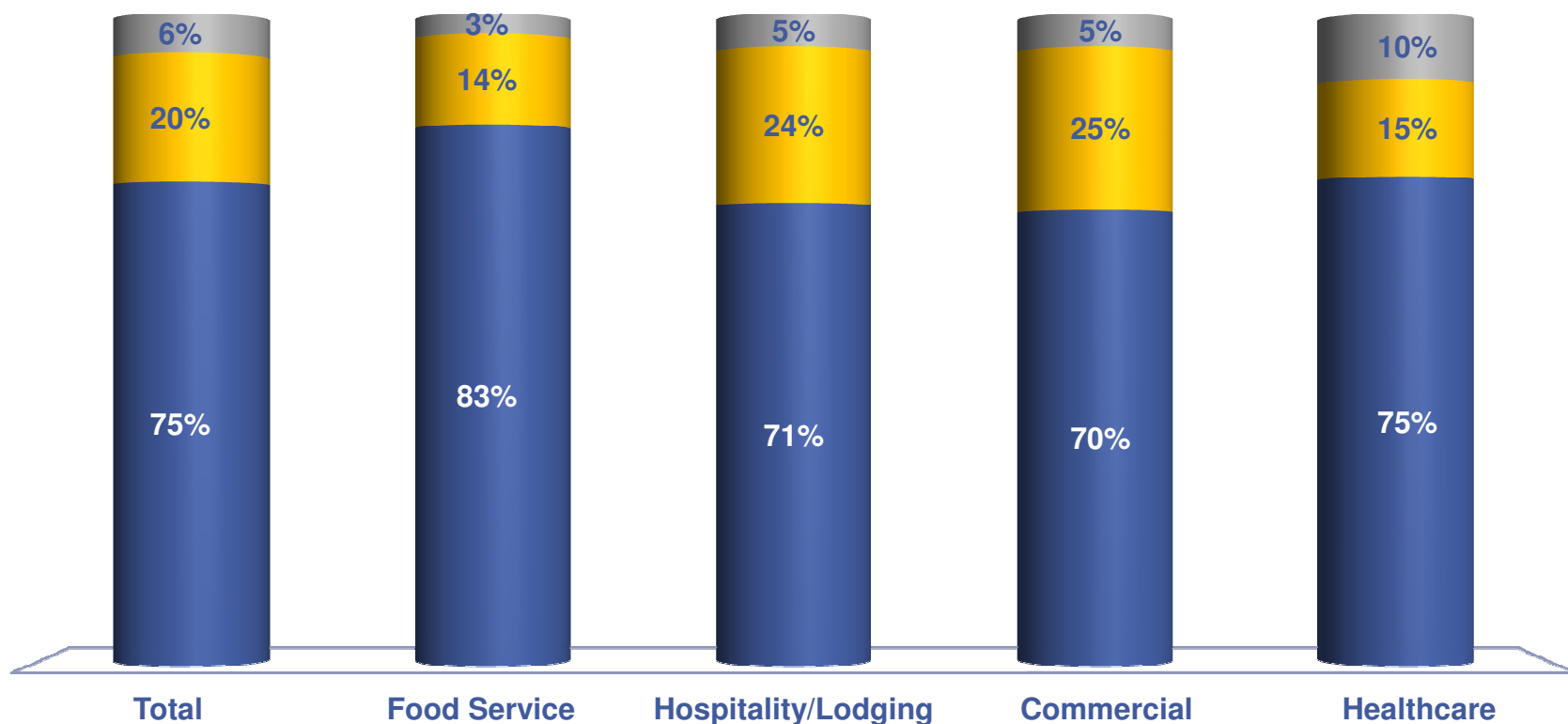




Preferable action to take in order to improve business' bottom line

By a margin of 3 to 1, respondents indicate the preferable action to improve their business' bottom line is to find ways to become more efficient, rather than raise their prices for clients or customers.

■ Find ways to become more efficient ■ Raise prices for clients or customers ■ Don't know/not sure

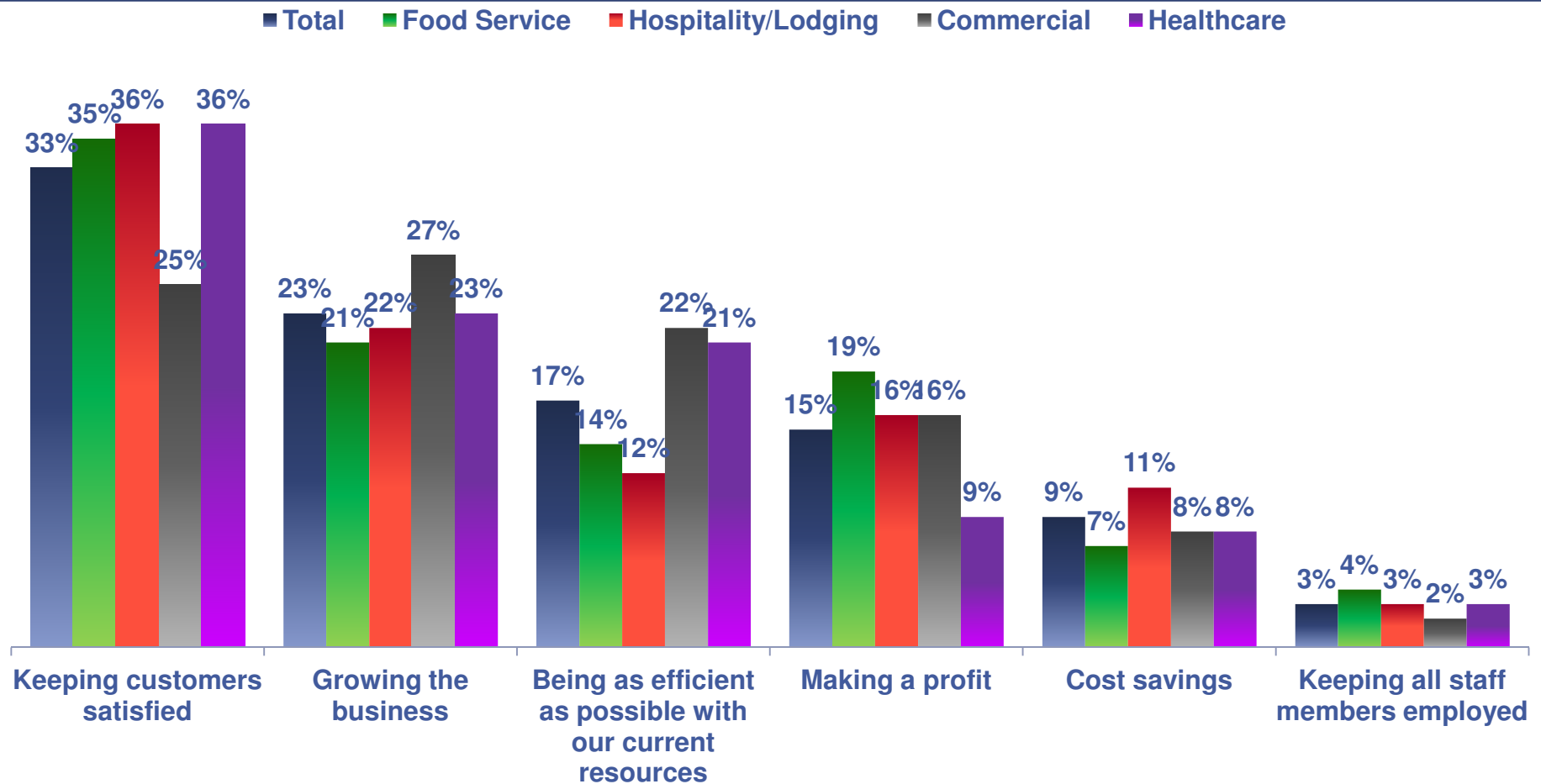


Q8. Which of the following actions would be preferable for your business to take in order to improve its bottom line?
Base: All Respondents (n=400); Each industry group (n=100)



Most important factor for your business right now

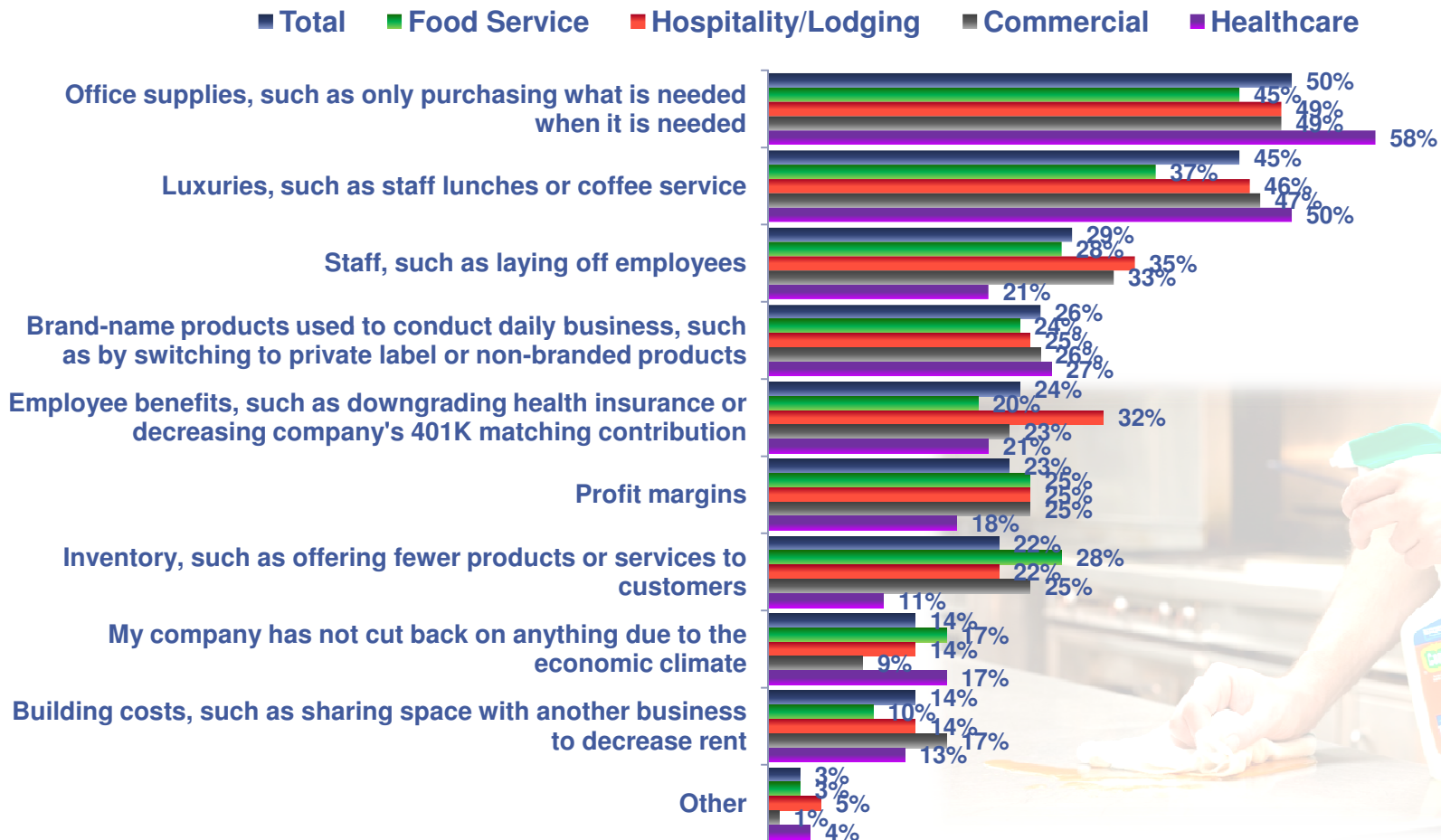
The most important business factor across three of four sectors is “keeping customers satisfied,” followed by “growing the business” (the commercial sector ranks this area first). The third-ranked factor, “Being as efficient as possible,” is largely carried by the commercial and healthcare sectors, whereas “making a profit” is a bigger concern in the food services and hospitality sector.





Top cut-backs made due to the economic climate

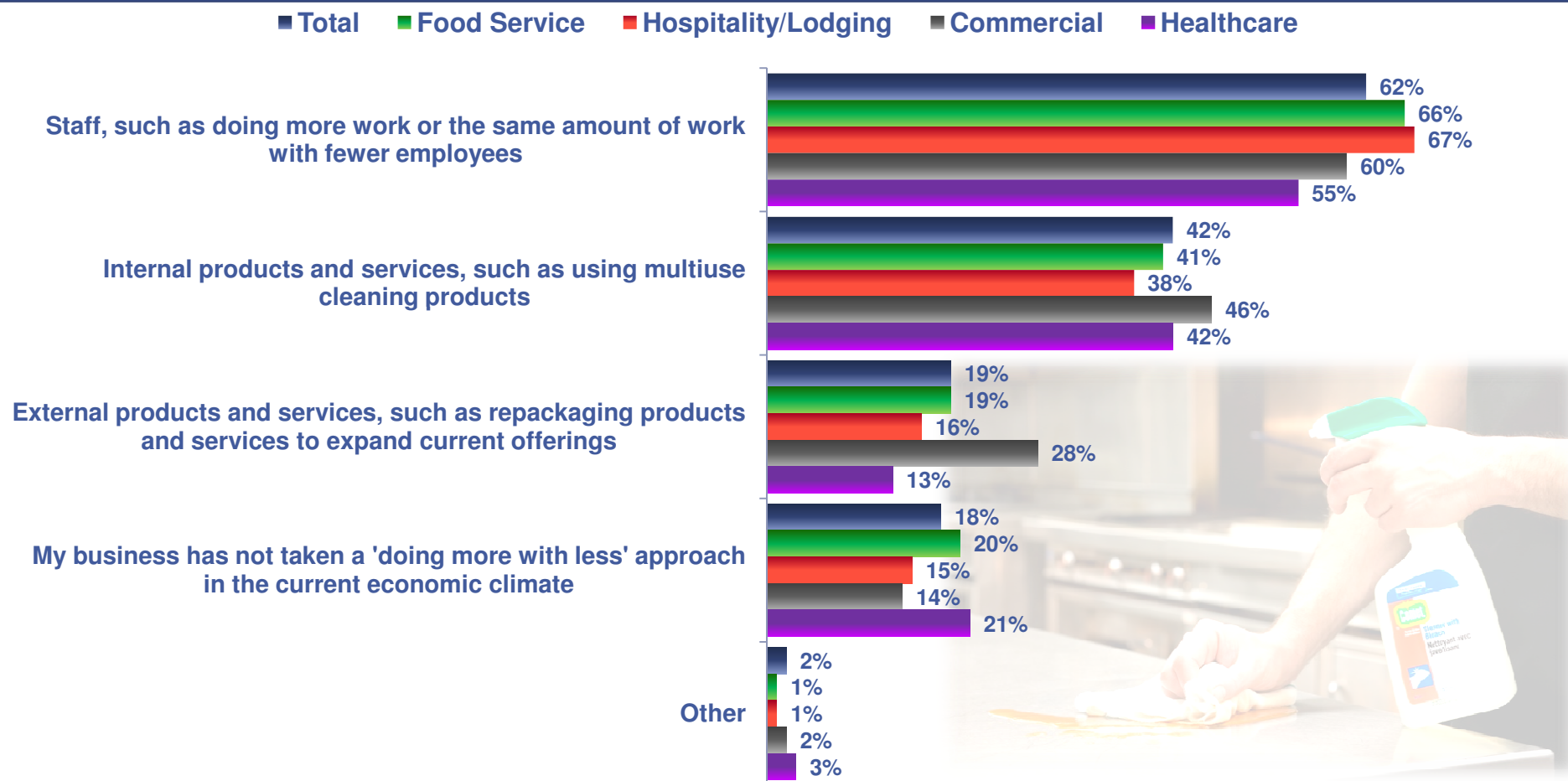
Office supplies, staff perks, staff resources and brand-name products are the frequently mentioned business cutback due to the economic climate. One in two respondents (an even larger proportion in the healthcare sector) indicate their business has cut back on office supplies, such as only purchasing what is needed when it is needed.





Areas taking a 'doing more with less' approach due to economic climate

Gains in efficiency have largely been made by doing more with less staff, mentioned by two of three in the food service and hospitality sectors, as well as a majority in the commercial and healthcare sectors. Across all sectors, 4 in 10 respondents indicate their business has achieved efficiency with internal products and services, such as using multiuse cleaning products.





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Cleaning Staff

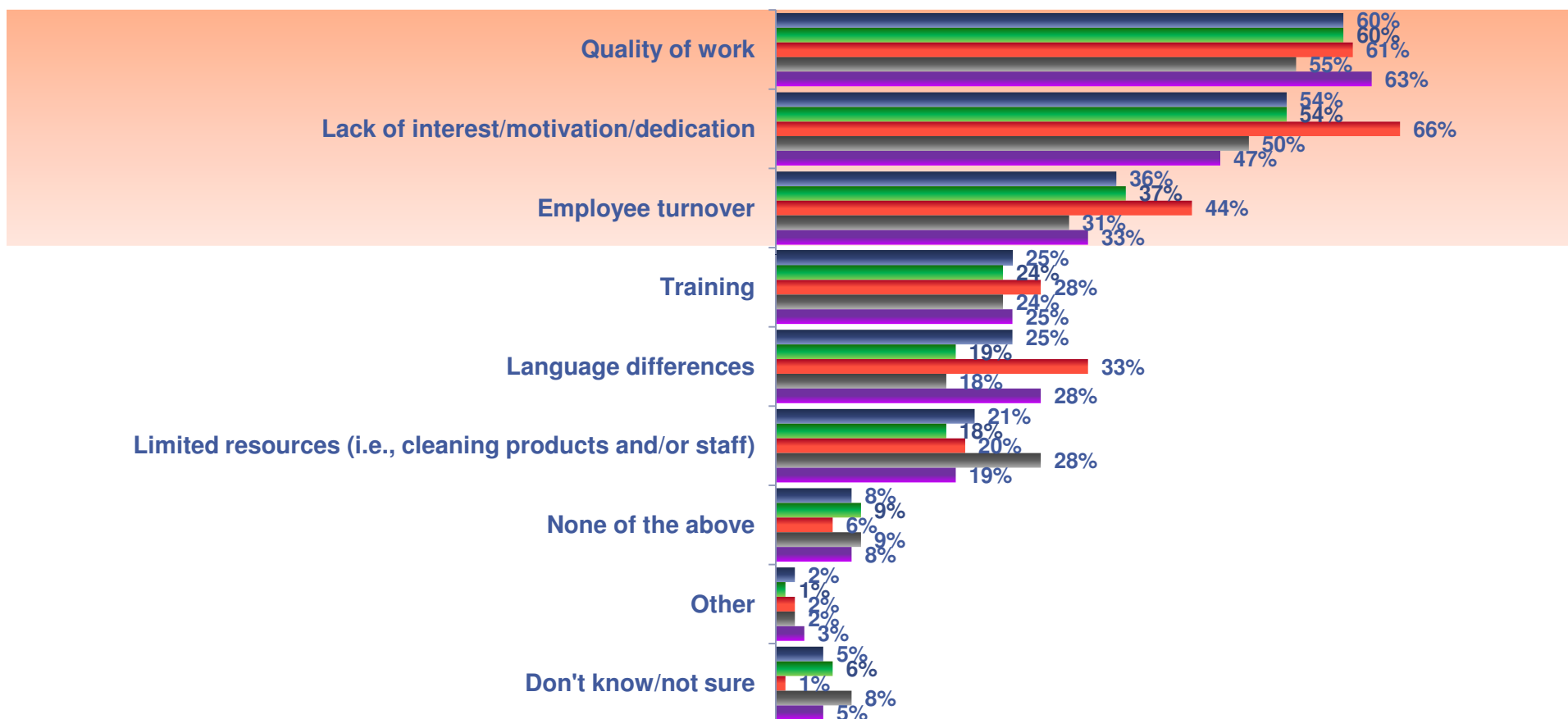




Top three challenges with managing a cleaning staff today

The top three challenges with managing a cleaning staff today are consistent across all 4 sectors: “quality of work,” “lack of interest/motivation/dedication” and the volume of “employee turnover.” “Training” is indicated as a top challenge by 1 in 4 respondents overall, and “language differences” emerge among 1 in 3 respondents in Hospitality.

■ Total ■ Food Service ■ Hospitality/Lodging ■ Commercial ■ Healthcare

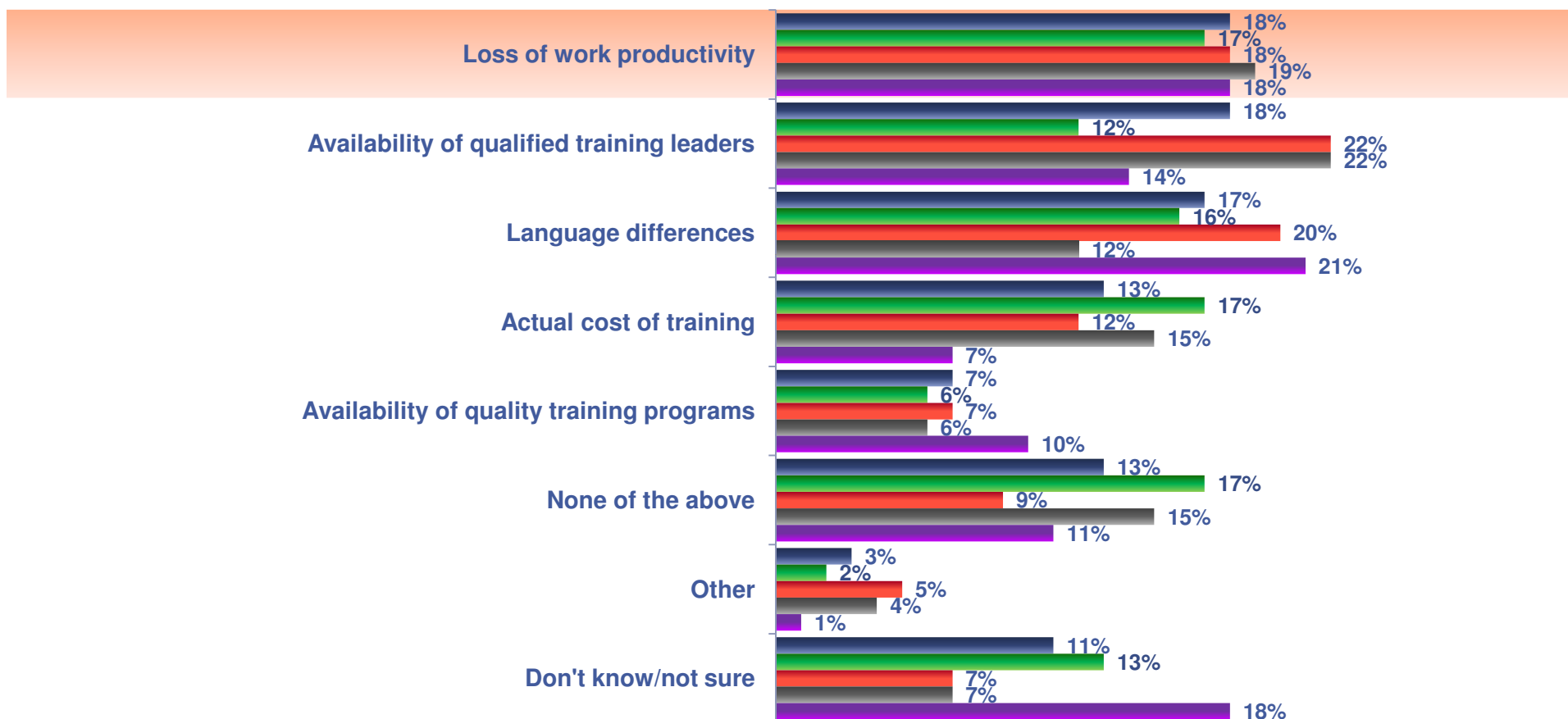




Biggest challenge / obstacle to effective cleaning-related training

The biggest challenges associated to effective cleaning-related training differ across sectors. Responses are split across “loss of work productivity,” “availability of qualified training leaders,” “language differences,” and “actual cost of training.” In fact, the combined responses “none of the above,” “other,” and “don’t know” account for the largest share of responses.

■ Total ■ Food Service ■ Hospitality/Lodging ■ Commercial ■ Healthcare





Those seen as most responsible for training cleaning staff to best perform their duties

The responses are heavily inclined towards “employers” as the party most responsible for training cleaning staff to best perform their duties.





Means seen as most effective for cleaning-related training

Across all sectors, one-on-one on-the-job training is by far seen as the most effective means of training staff, particularly in the food service and hospitality sectors.





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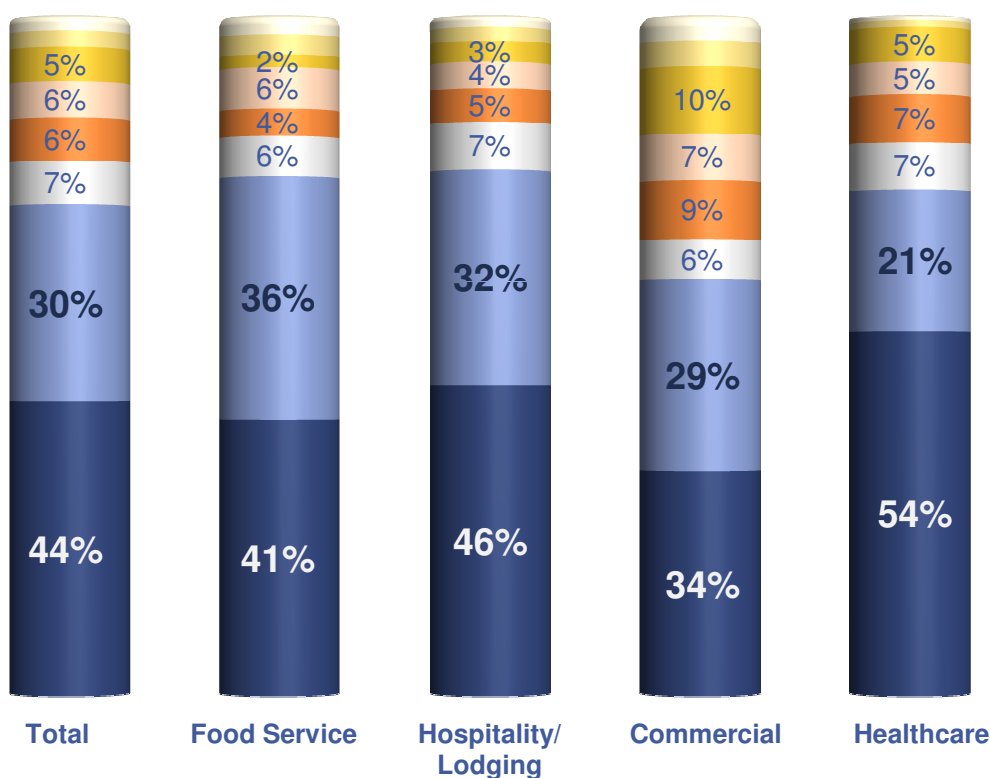
Cleaning Products





Importance of the following factors to you & your business when purchasing cleaning products...

“Product performance/efficacy” is the most important factor for decision-makers when purchasing cleaning products; across all sectors, over four in ten believe this is the most important factor. While respondents in the commercial sector are less inclined to select “product performance/efficacy” than respondents in other sectors, it still ranks as the most important factor in this sector.



- Recommendation from distributor or sales representative
- Recommendation from distributor or sales representative
- Brand or manufacturer reputation/loyalty
- Customer service/training provided by manufacturer
- Impact on the environment
- Recommendation from employees
- Price
- Product performance/efficacy/ease-of-use**

Q16. Please rank each of the following factors in terms of importance to you and your business when purchasing cleaning products, with 1 being the most important, 2 being second most important, and so on.

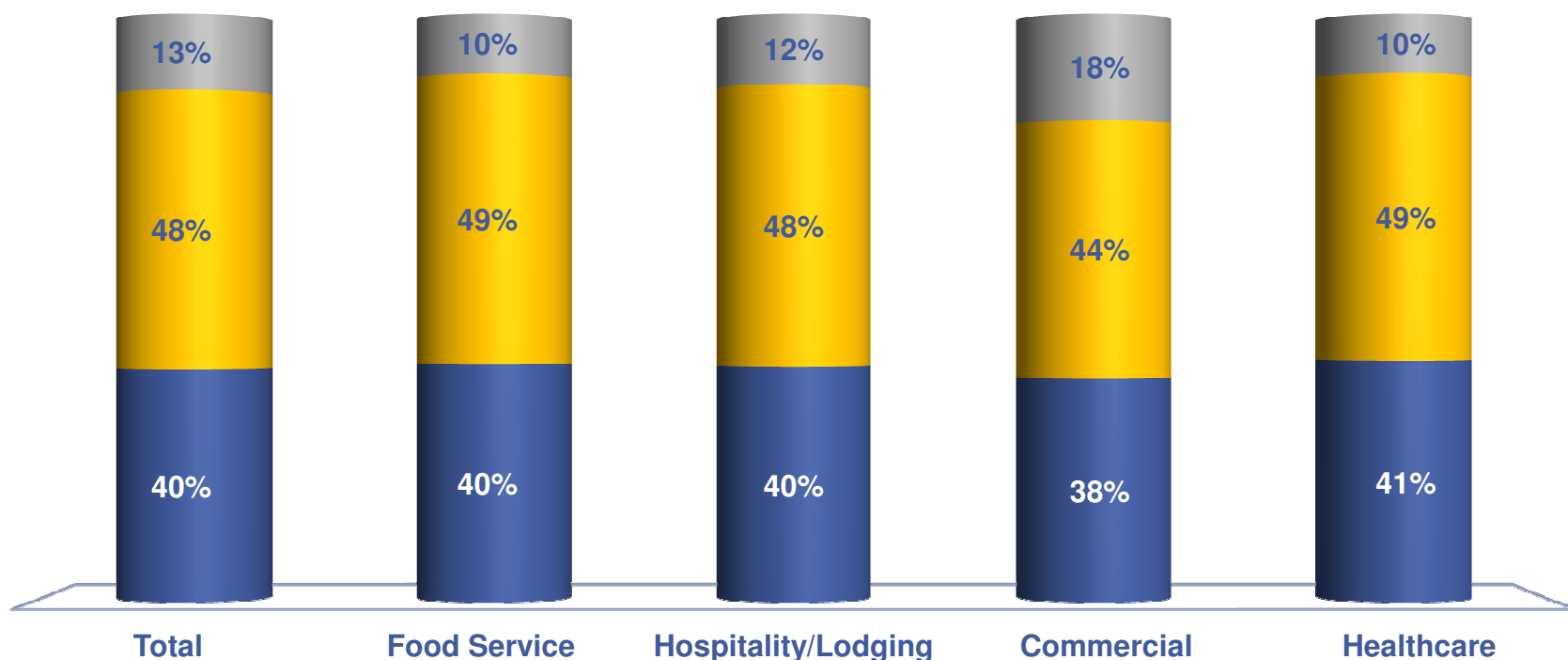
Base: All Respondents (n=400); Each industry group (n=100)



What best defines value when it comes to the cleaning products used within your business

Across all 4 sectors, respondents are split between “high quality/effectiveness” and the “versatility of use” to determine the best value of a cleaning product, with a slight edge given to “versatility.” Using a cleaning product that is of “low price” accounts for 1 in 10 definitions of value in the food service, hospitality and healthcare sectors, and closer to 1 in 5 definitions of value in the commercial sector.

■ High quality or effectiveness ■ Versatility of use, single product for more than one purpose ■ Low price



Q17. When it comes to the cleaning products you use within your business, which of the following do you feel best defines “value?”
Base: All Respondents (n=400); Each industry group (n=100)



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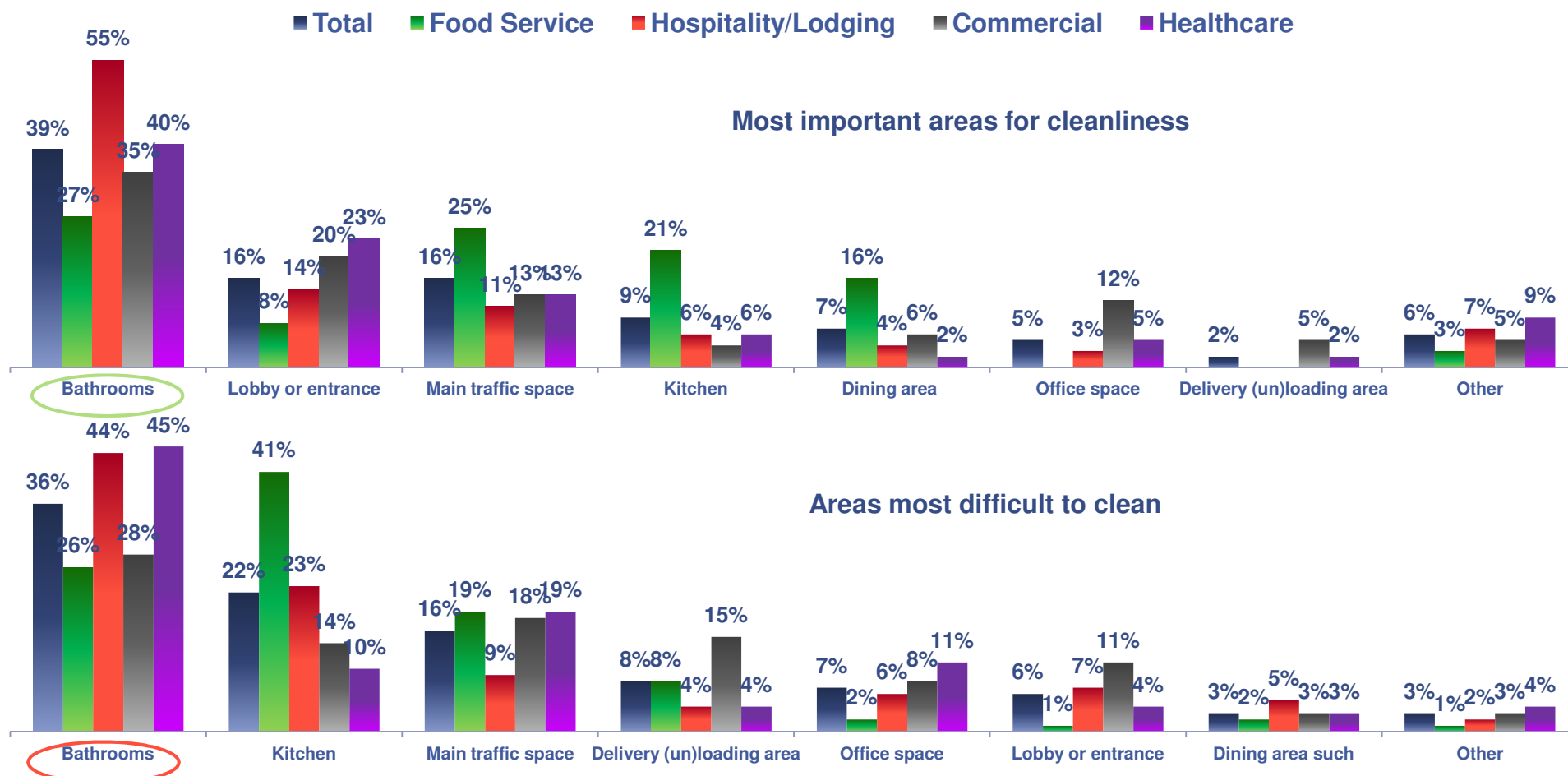
Cleaning





Most important / most difficult areas to maintain cleanliness

Bathrooms are a critical area, ranked the most important to clean and most difficult to clean. Respondents from the food service sector also pay particular attention to main traffic, kitchen and dining areas, while respondents from the healthcare and commercial sectors are also concerned with the cleanliness of the lobby or entrance.



Q18. In your opinion, the cleanliness of which of the following areas is most important to your customers?

Base: All Respondents (n=400); Each industry group (n=100)

Q19. In your opinion, which of the following areas is usually the most difficult to clean?

Base: All Respondents (n=400); Each industry group (n=100)



Elements seen as most helpful when it comes to performing cleaning services

The most helpful element when it comes to performing cleaning services is that the products get the job done the first time. Products that work quickly and having a simple routine that all staff can get used to round off the top three elements.





Elements preventing business' cleaning department from running as smoothly as possible

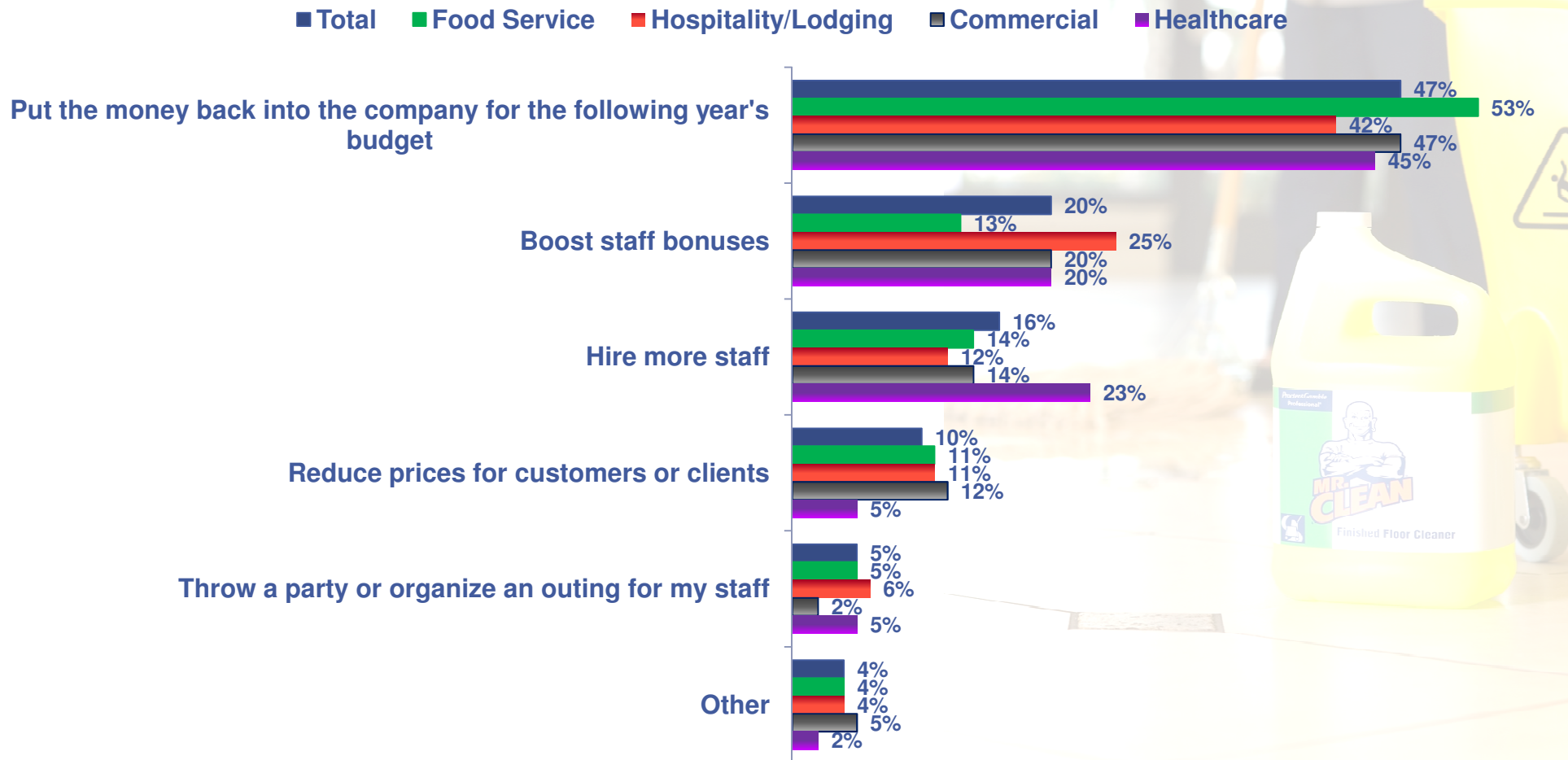
While there is no strong overall consensus on what prevents the cleaning department from running as smoothly as possible, respondents identify three principal obstacles: staff effort and attitude, budget cuts/limited resources, and training. Product confusion (mentioned by 16% in the healthcare sector) and product purchasing do not figure among the top obstacles overall to running a smooth cleaning department.





If cleaning costs were cut in half, what would you do with the extra money?

If cleaning costs were cut in half, approximately one in two respondents would prefer to put the extra money into the company for the following year's budget, rather than spend it on bonuses, hiring, reducing prices, or indirect perks for staff.

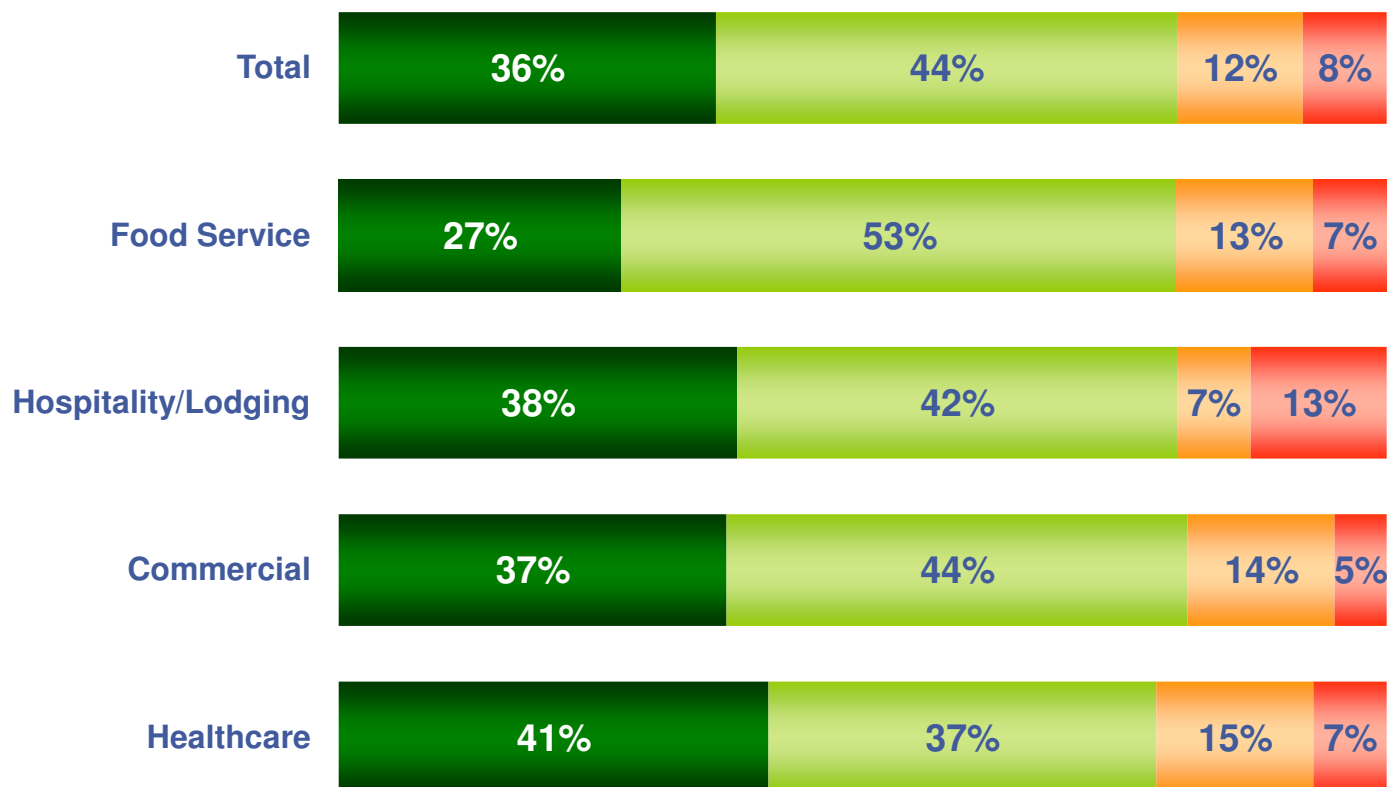




Importance of opinions and feedback from cleaning personnel regarding the products being used

Overall, 8 in 10 respondents indicate the opinion and feedback of cleaning personnel regarding the products being used is important, with 4 in 10 in the Healthcare sector indicating these opinions and feedback is very important.

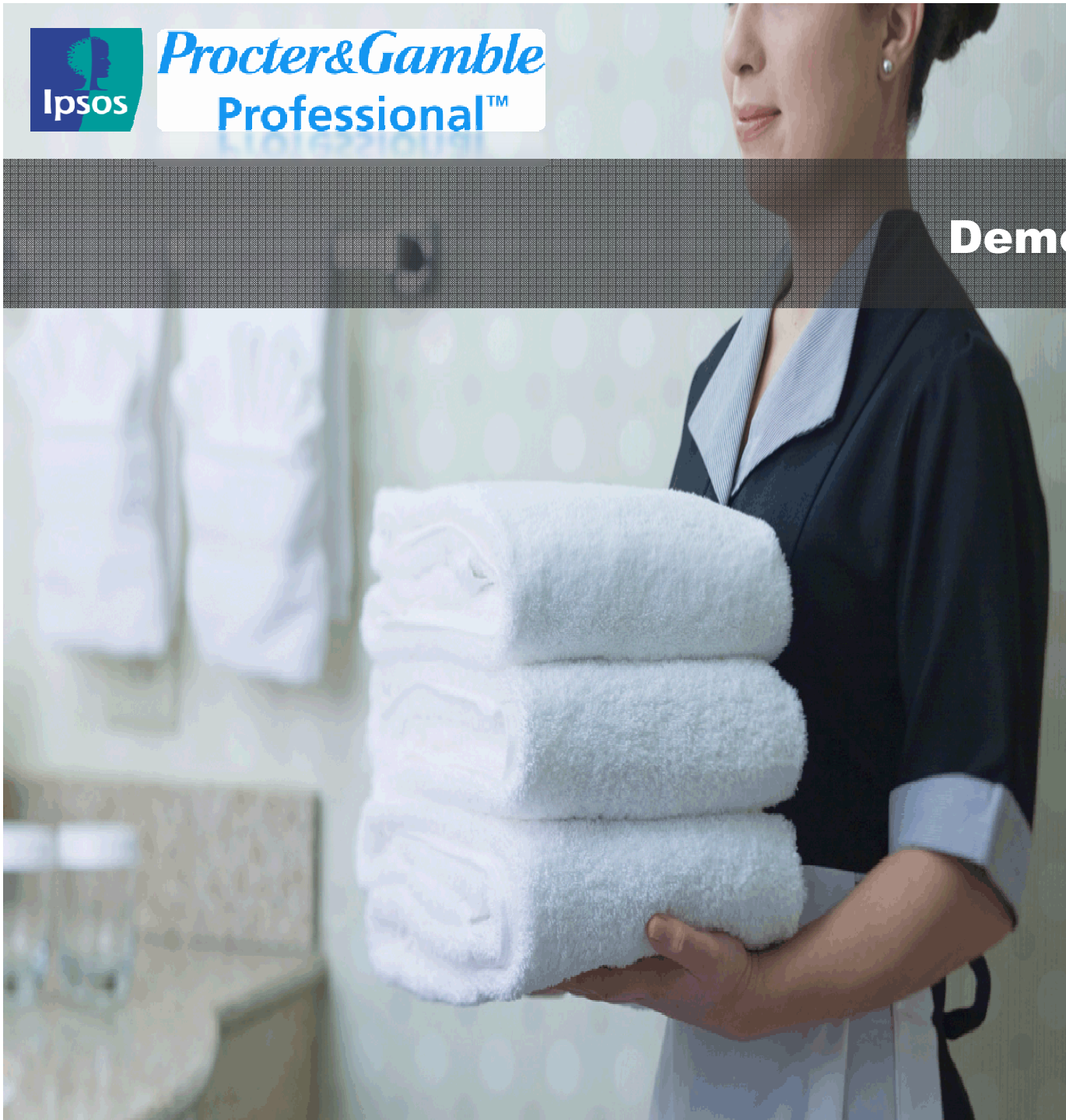
■ Extremely important ■ Somewhat important ■ Somewhat unimportant ■ Extremely unimportant





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Demographics

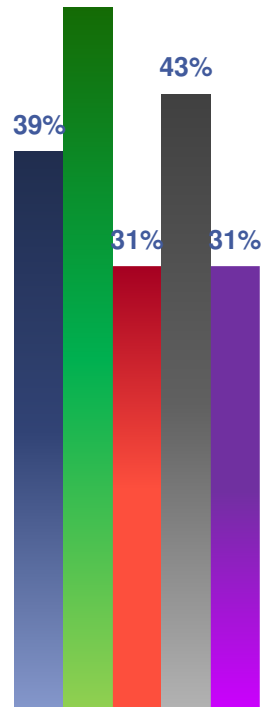




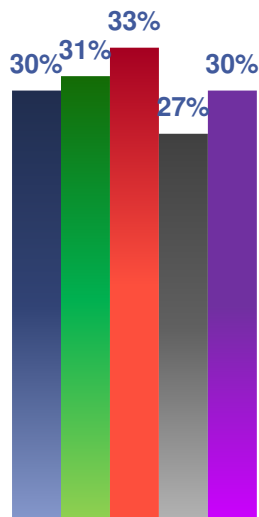
Job title / function

■ Total ■ Food Service ■ Hospitality/Lodging ■ Commercial ■ Healthcare

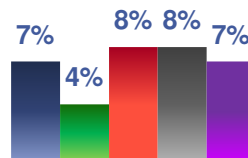
Owner/operator/ proprietor 49%



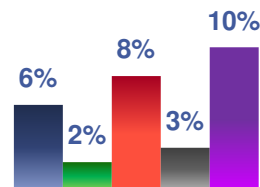
General Manager



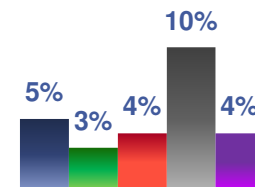
Purchasing manager



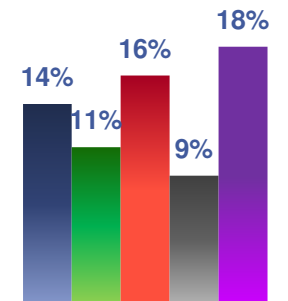
Building/facility manager



Maintenance/ operations/ Housekeeping manager



Other



Q24. What is your job title or function?

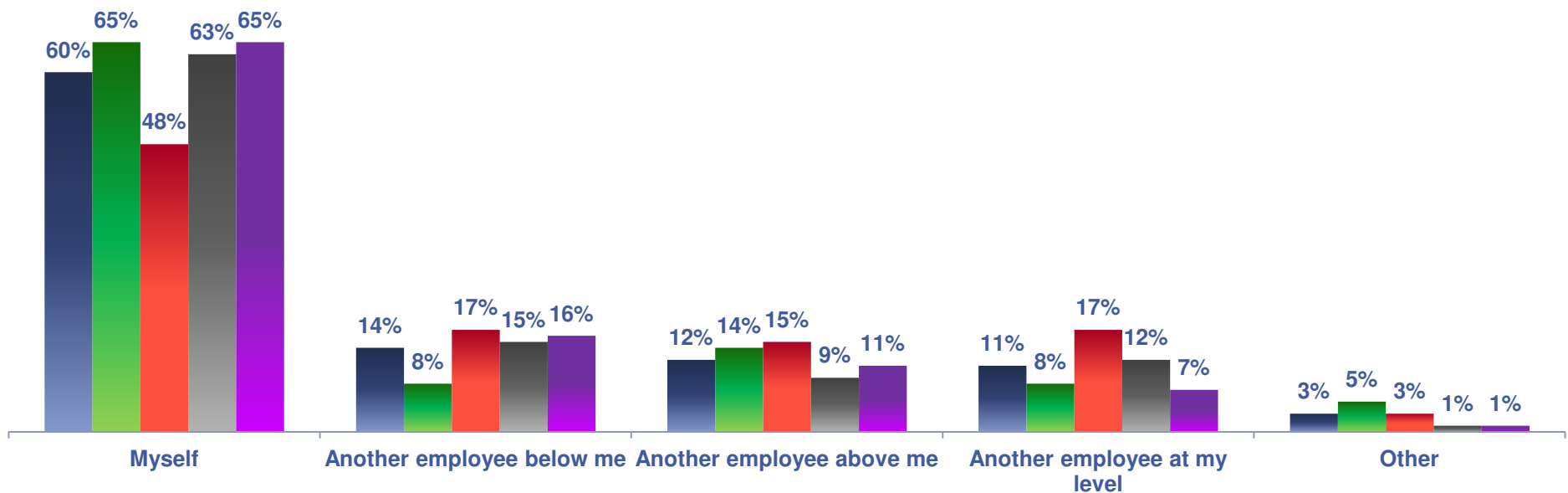
Base: All Respondents (n=400); Each industry group (n=100)



Number of employees / who makes most cleaning product decision for the business

	Total	Food Service	Hospitality/ Lodging	Commercial	Healthcare
1 - 10	37%	32%	30%	42%	44%
11 - 50	24%	29%	21%	27%	20%
51 - 100	11%	8%	15%	12%	7%
101 - 1,000	15%	18%	12%	11%	19%
1,001 - 10,000	8%	9%	12%	5%	7%
Over 10,000	5%	4%	10%	3%	3%

■ Total ■ Food Service ■ Hospitality/Lodging ■ Commercial ■ Healthcare



Q25. And about how many employees does your company currently have at all locations? Your best guess is fine.

Base: All Respondents (n=400); Each industry group (n=100)

Q26. Which of the following best describes who makes most of the cleaning product decisions for your business?

Base: All Respondents (n=400); Each industry group (n=100)



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Thank You!

For More Information, Contact:

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