Ipsos Public Affairs
The Social Research and Corporate Reputation Specialists

P&G Professional™

Cleaning Industry Insights Survey

2013 Findings

June 2013

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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, May 28-31, 2013.
- The sample consists of 408 managers of cleaning operations based in the United States from the following industries:
  - ⇨ Food Service (n=101)
  - ⇨ Hospitality/ Lodging (n=100)
  - ⇨ Commercial (n=105)
  - ⇨ Healthcare (n=102)
- Margins of sampling error at a 95 percent confidence level would be +/- 5 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: Perceptions of Business Efficiency and the Economic Climate

Overall, respondents tend to be have a more positive outlook in 2013 than those surveyed in 2011, as reflected in a myriad of findings across a variety of sectors:

- **Perceived Increases in Efficiency**: Compared to respondents in 2011, a greater proportion of the 2013 respondents see their businesses as being effective in keeping its costs down over the past twelve months. Furthermore, fewer respondents overall report feeling pressure to keep operating costs down, with a significant decrease vs. 2011 in terms of those who feel *extreme* pressure to do so.
  - As in 2011, a considerable majority of respondents view their cleaning operations as having been efficient in the last twelve months, though in 2013 more feel that their businesses have been *extremely* efficient.
    - Most respondents identify reducing waste as one of the ways in which their businesses have improved their efficiency over the last two years.
  - Increasing efficiency is also viewed across all sectors as the preferred course of action to improve the bottom line, over raising prices and other measures.
  - In terms of the obstacles that prevent their businesses' cleaning departments from running as smoothly as possible, one-quarter of all respondents say that there are no operational inefficiencies relating to their business's cleaning efforts, compared to only about one in six who said so in 2011.
  - Healthcare is the only sector in which respondents perceive increased levels of pressure to keep operating costs down, compared to 2011 (while not statistically significant), particularly the levels of "extreme pressure."
- **Fewer Cutbacks:** Far fewer cleaning operations managers are reporting that cutbacks are being made due to the economic climate vs. 2011, particularly in the areas of office supplies and luxuries, although those in the Healthcare sector were somewhat more likely to identify these as areas of cutbacks, as well as employee benefits, and staff.
  - Similarly, fewer respondents overall report that their businesses are adopting a "doing more with less" approach in various areas than did so in 2011. This decrease is particularly noteworthy in the Commercial sector.
  - Although a new question for 2013 found that over four in ten identify a reduction in business caused by economic downturn as a cause of worry about their business, only one in five identify budgetary cuts as a cause for concern, and only about one in seven worry about job cuts or layoffs.
- **Cautious Optimism about the Economic Climate:** Responses to new questions regarding the economic climate suggests that the 2013 respondents generally have an optimistic outlook, which seem to be consistent with their reporting reduced pressure to keep costs down, as well as of fewer cutbacks, described above:
  - While fewer than four in ten believe that the economic recession is now over, three-quarters expect business within their sector to improve within the next twelve months.

Executive Summary: Challenges and Concerns

- **Managing Staff:** As in 2011, the biggest challenges of managing a cleaning staff are identified as quality of work, followed by lack of interest, motivation and dedication. Similar proportions of respondents in 2013 as in 2011 also identified employee turnover, training, and language differences as being challenges.
  - However, limited resources (such as cleaning products and/or staff) are identified by fewer respondents in 2013 as being a challenge to managing staff, particularly in the Commercial sector; this decrease is consistent with the reported reduction in cutbacks.
- **Smooth Running of the Cleaning Department:** Four in ten respondents consider staff effort and attitude as preventing the business's cleaning department from running as smoothly as possible.
- **Cleaning-Related Training:** Loss of work productivity, language differences, and the availability of qualified training leaders are perceived to be the among the main challenges to effective cleaning-related training in 2013, similar to 2011.
  - However, significantly fewer respondents in 2013 identify either budget cuts, limited resources, or being understaffed as being obstacles, compared to 2011. Training is also viewed by fewer respondents as being a challenge.
- **Areas to Clean**: Bathrooms once again lead whose cleanliness is viewed as being the most important to customers; as in 2011, they are also viewed as being the most difficult to clean.
  - However, about one in four 2013 respondents consider the cleanliness of the main traffic space to be of greatest importance to customers, an increase from the one in six who did so in 2011.
- **Causes of Worry about Business:** This new question found that reduction in business caused by economic downturn to be among the top three causes of worry, followed by customer dissatisfaction.
- **Causes of Worry Regarding Cleaning or Disinfection:** Similarly, customer dissatisfaction or complaints are a top cause of worry, in terms of cleaning or disinfection.
  - This level of concern about customer dissatisfaction is consistent with the finding that one-third of respondents identify keeping customers satisfied as the most important factor for their business right now (similar to 2011).
- **Pride:** Two-thirds of respondents overall say that they are extremely or very proud of their cleanliness, hygiene and cleaning procedures; however, only about half in the Commercial sector feel this way.

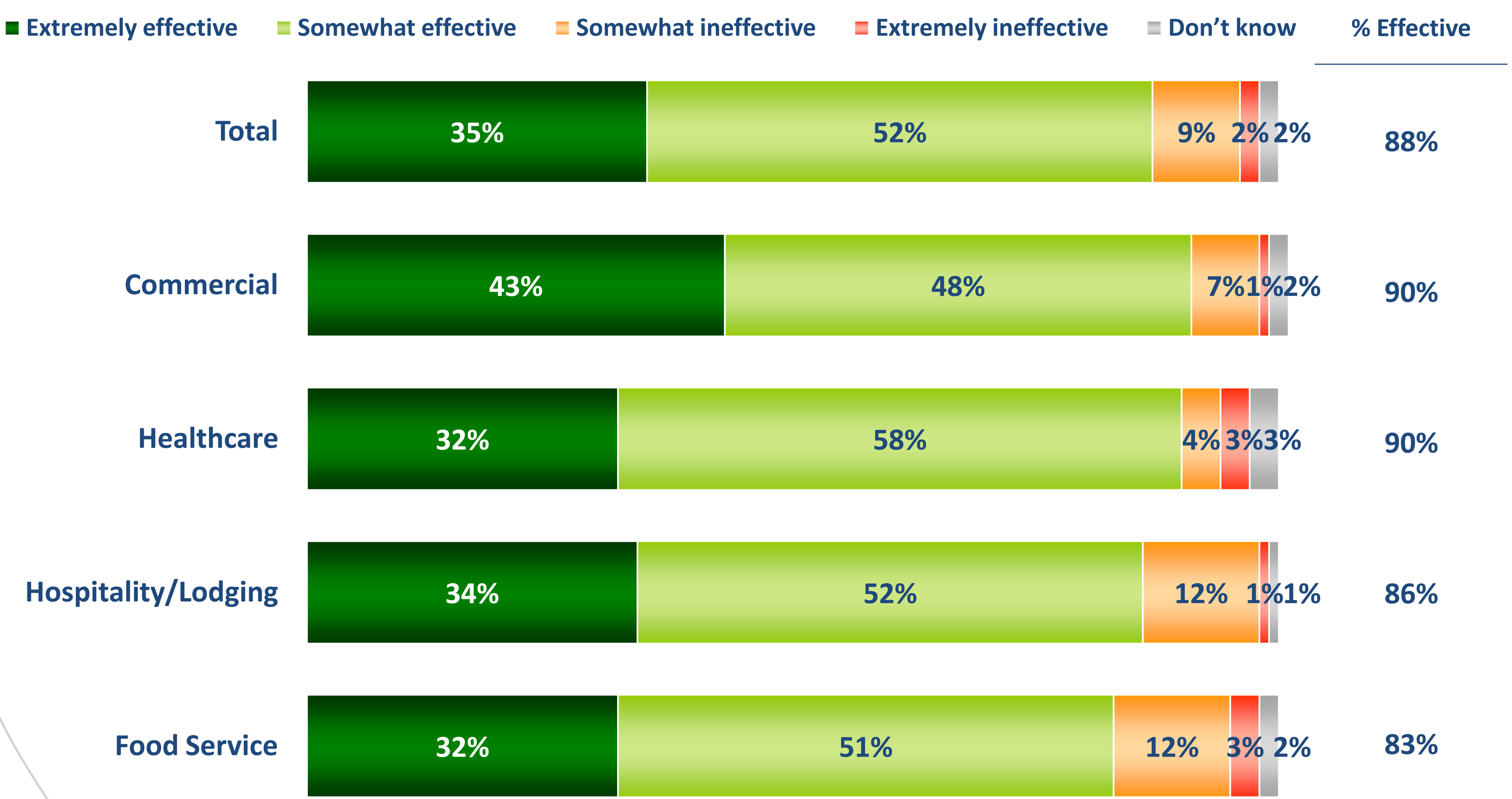
Executive Summary: Considerations and Priorities re: Cleaning Products

- **Product Performance Leads Factors in Purchasing Cleaning Products:** As in 2011, product performance, efficacy, and ease-of-use, as well as price, remain the top-ranked factors in terms of their importance when purchasing cleaning products.
- **High Quality and Effectiveness Define Value**: Although different options were offered in terms of defining value in terms of cleaning products than in 2011, high quality and effectiveness of use nevertheless emerged once again as that which many respondents feel best defines "value," followed by versatility of use.
- **Important Elements in Performing Cleaning Services**: Over half of all respondents consider products that get the job done the first time to be among the top two elements that would be most helpful in performing cleaning services; an even greater proportion than in 2011.
  - This finding is consistent with the importance of product performance as a factor in purchasing cleaning products, as well as that of high quality and effectiveness in terms of value.
- **Importance of Feedback:** As in 2011, a considerable majority of respondents consider the opinions and feedback of cleaning personnel regarding the products being used to be important.

Detailed Findings

Effectiveness in Keeping Operating Costs Down in Past 12 Months

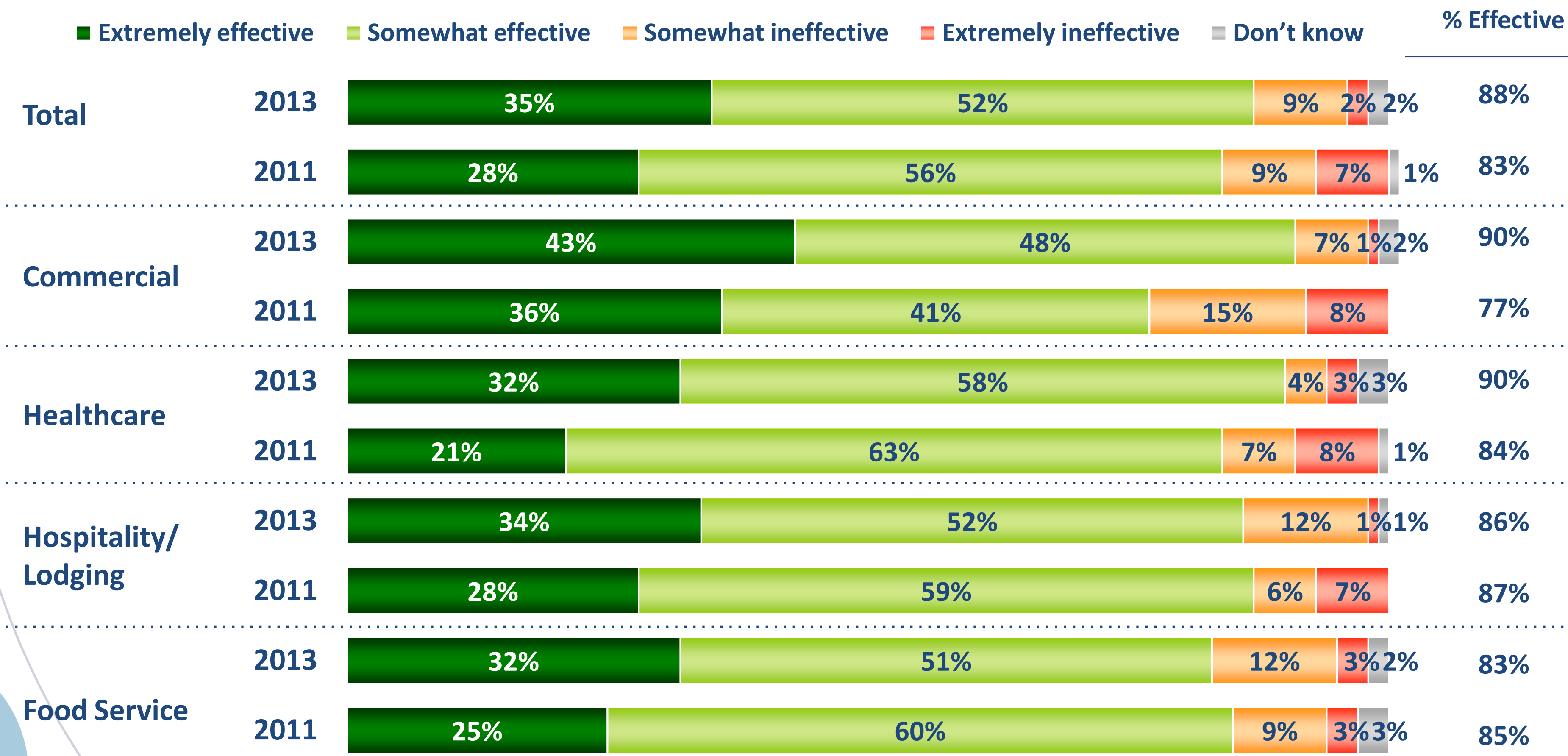
- Nine in ten respondents overall rate their business as being extremely (35%) or somewhat (52%) effective at keeping operations costs down in the past 12 months. While at least eight in ten across sectors feel this way, those in Food Service are most likely to say that their business has been ineffective in terms of keeping costs down (15%).



Q5. Overall how effective or ineffective has your business been with regards to keeping its operating costs down in the past 12 months?
Base: All Respondents (n=408)

Effectiveness in Keeping Operating Costs Down in Past 12 Months: Trended by Sector

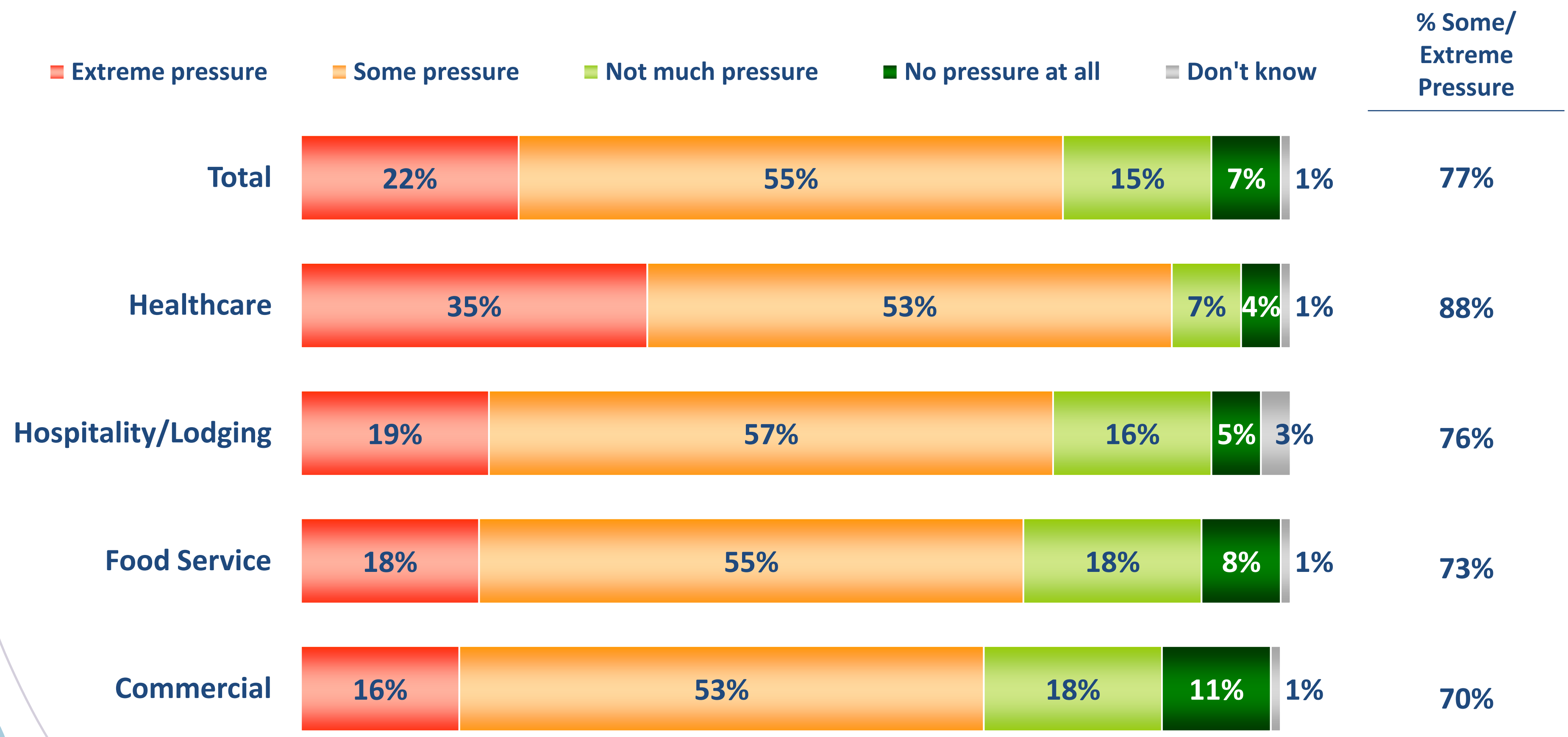
- In 2013, respondents overall, but particularly those in the Commercial sector, are more likely to view their business as having been effective in keeping costs down in the past twelve months than they were in 2011. In the Hospitality/lodging and Food Service sectors, respondents hold similar views now as they did in 2011 when it comes to their businesses' ability to keep operating costs down.



Q5. Overall how effective or ineffective has your business been with regards to keeping its operating costs down in the past 12 months?
Base: All Respondents 2013 (n=408); 2011 (n= 400)

Pressure to Keep Operating Costs Down

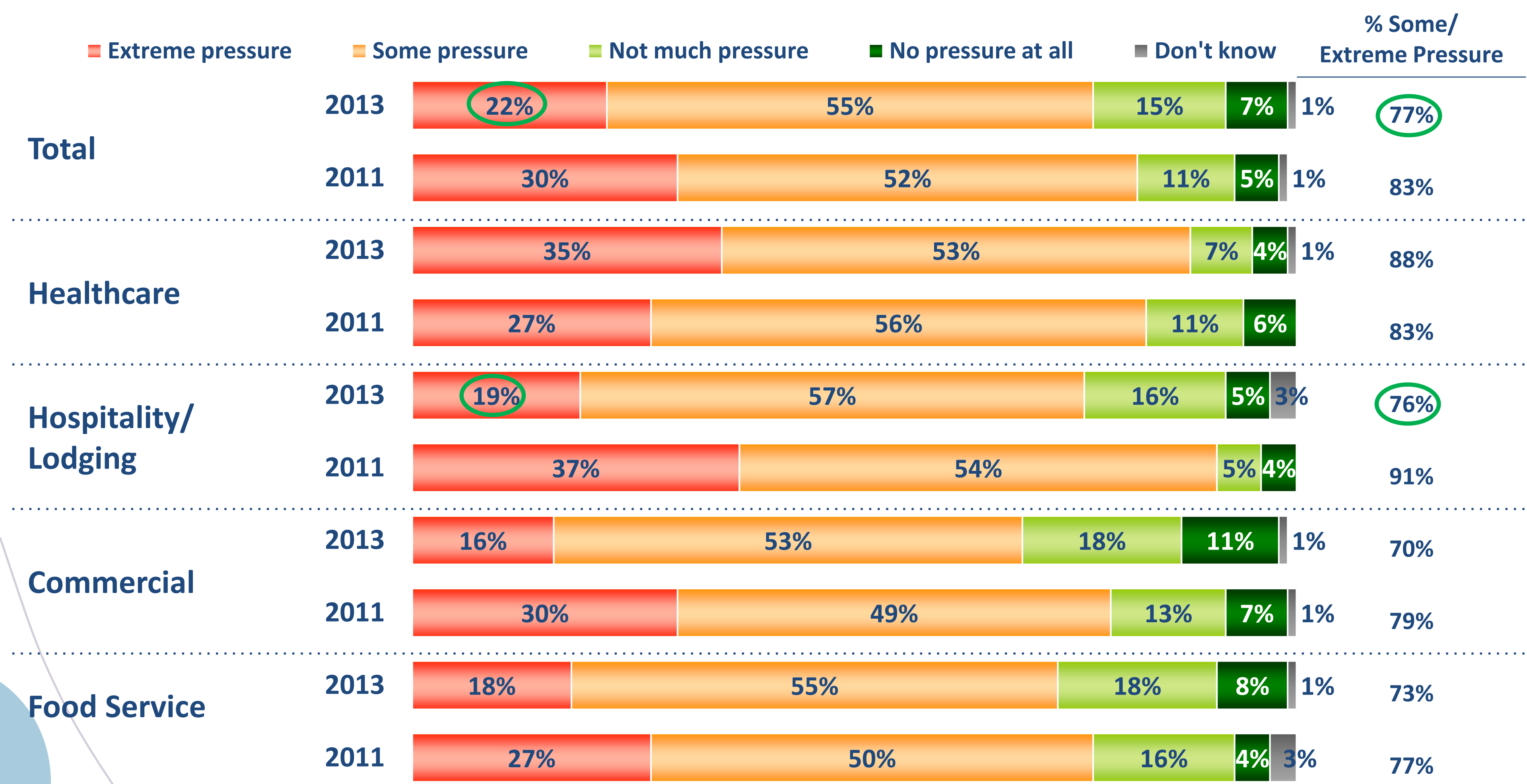
- Perhaps the efficacy in keeping operating costs down is tied to the level of pressure these respondents feel to do so; over three-quarters report that they feel at least some pressure to keep operating costs down, including two in ten who feel *extreme* pressure.
- Those in the Healthcare sector are most likely to feel *extreme* pressure, though at least seven in ten across sectors report feeling at least some pressure.



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=408)

Pressure to Keep Operating Costs Down: Trended by Sector

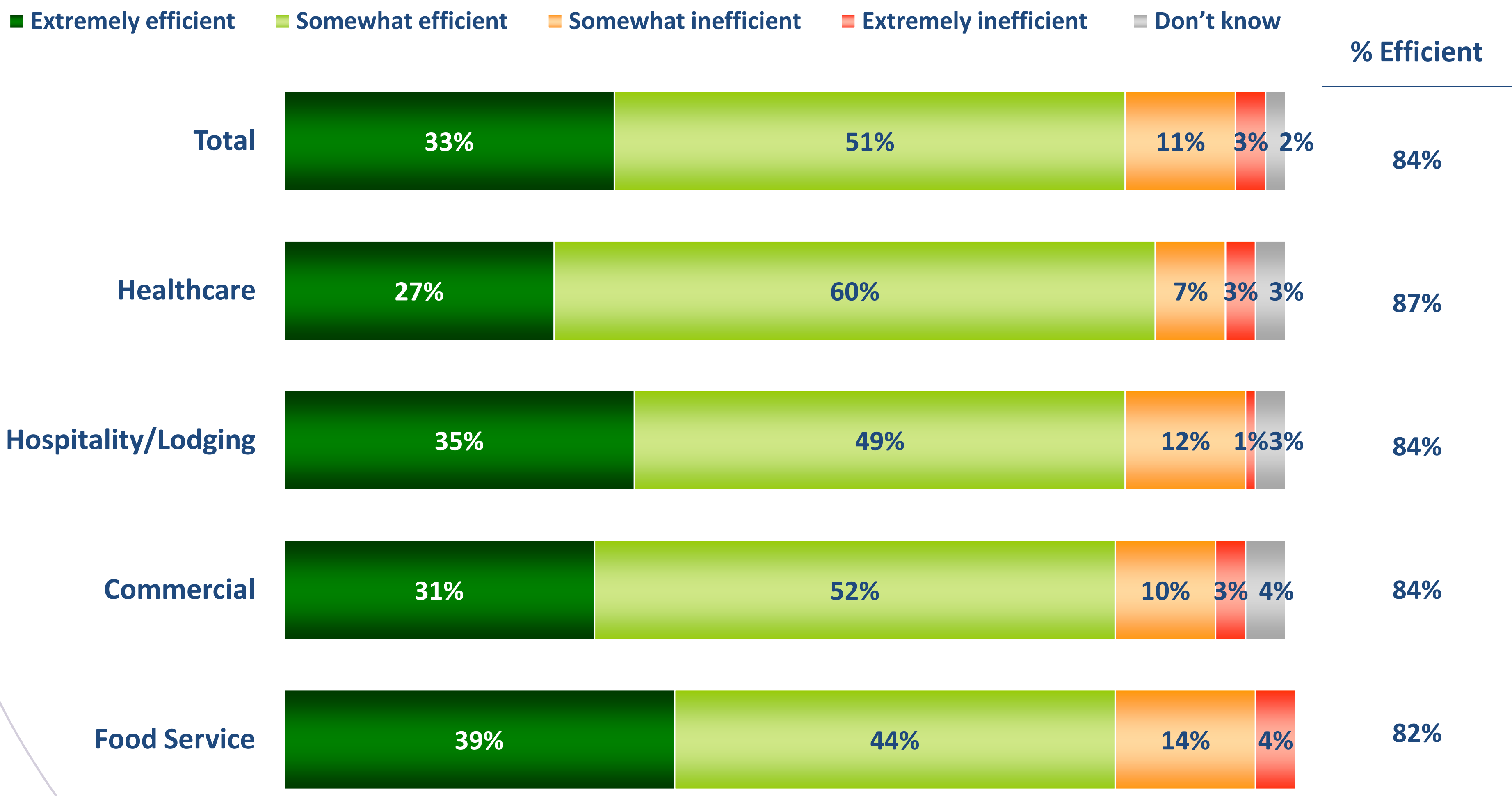
- Compared to 2011, fewer respondents report feeling some or extreme pressure to keep operating costs down, with a notable decrease in those who report feeling extreme pressure to do so.
- While this decrease is seen in all sectors except for Healthcare, it is most notable among those in the Hospitality/Lodging sector, in which there is also an 18-point drop vs. 2011 in terms of the proportion of those who feel extreme pressure.



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 2013 (n=408); 2011(n=400)

Efficiency of Business' Cleaning Operations in the Past 12 Months

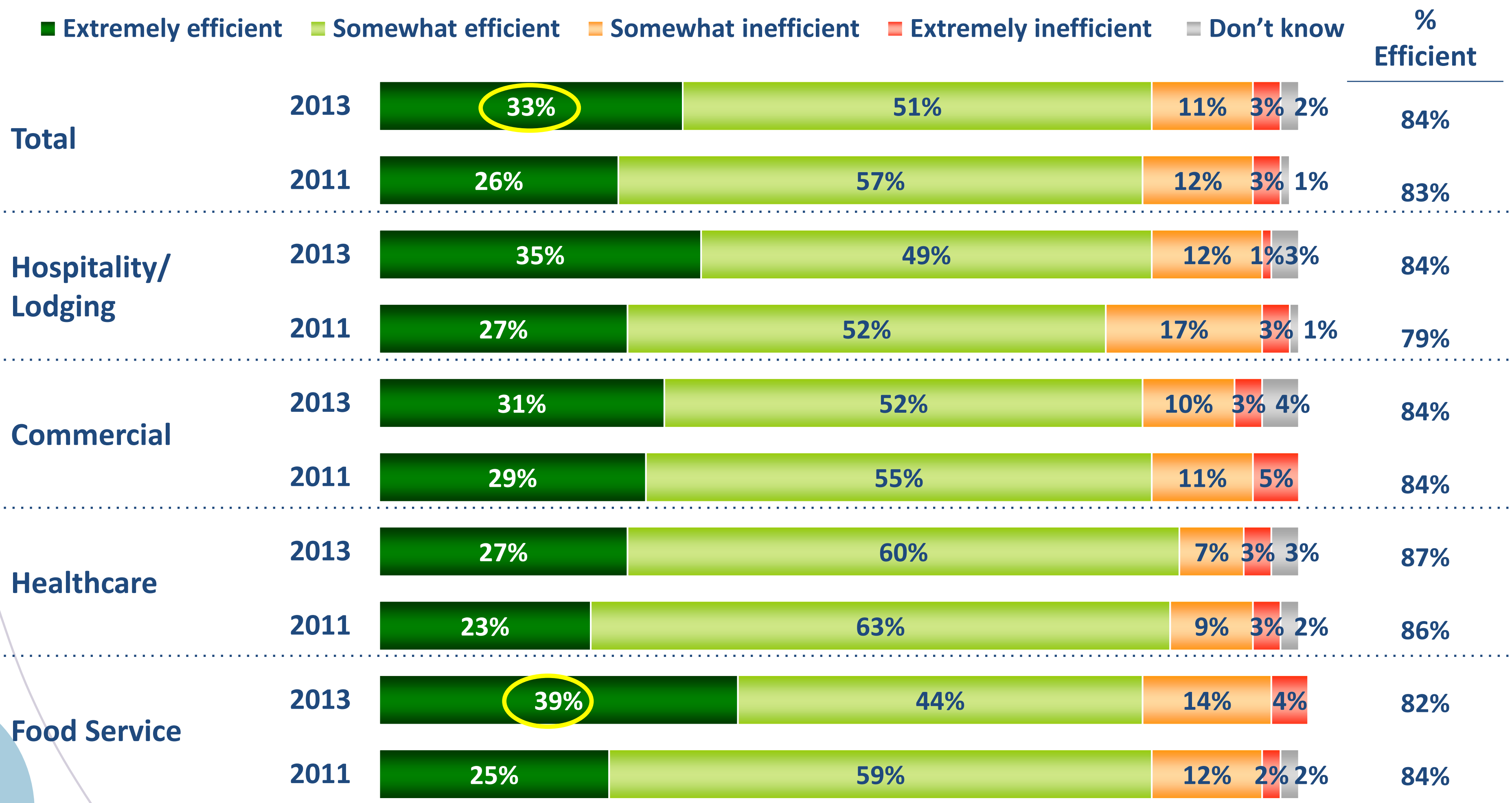
- Across all four sectors, a considerable majority of respondents view their business as having been efficient in terms of their cleaning operations over the past year, with one-third describing their cleaning operations as having been *very* efficient.



Q7. Thinking exclusively about cleaning operations, how efficient or inefficient has your business been in the last 12 months?
Base: All Respondents (n=408)

Efficiency of Business' Cleaning Operations: Trended by Sector

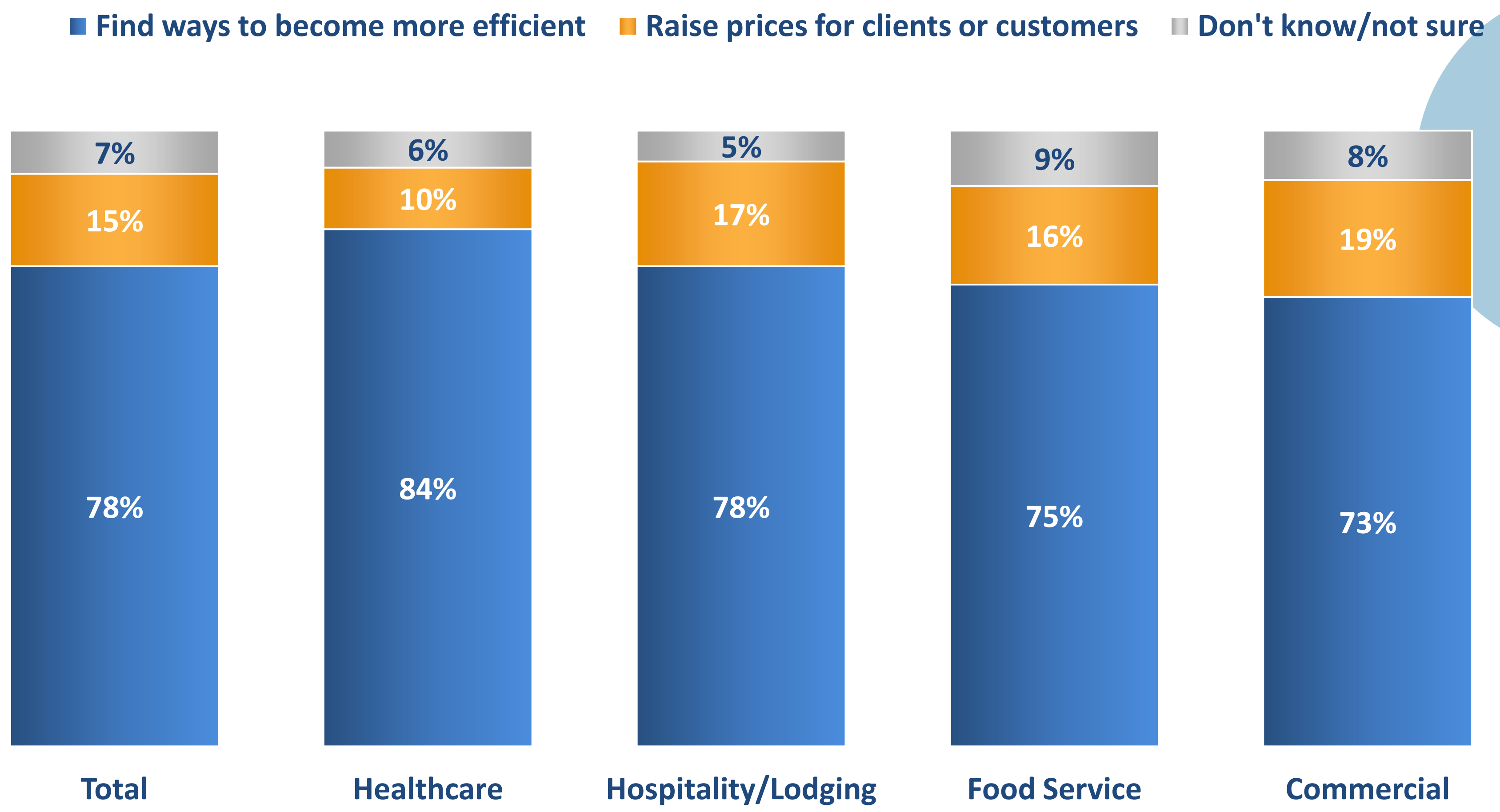
- Opinions remain largely on par with those of 2011 when it comes to the efficiency of cleaning operations. However, a greater proportion of respondents overall deem their businesses to be *extremely efficient* vs. 2011, particularly in the Food Service sector.



Q7. Thinking exclusively about cleaning operations, how efficient or inefficient has your business been in the last 12 months?
Base: All Respondents 2013 (n=408); 2011(n=400)

Improving the Bottom Line – Increasing Efficiency vs. Raising Costs

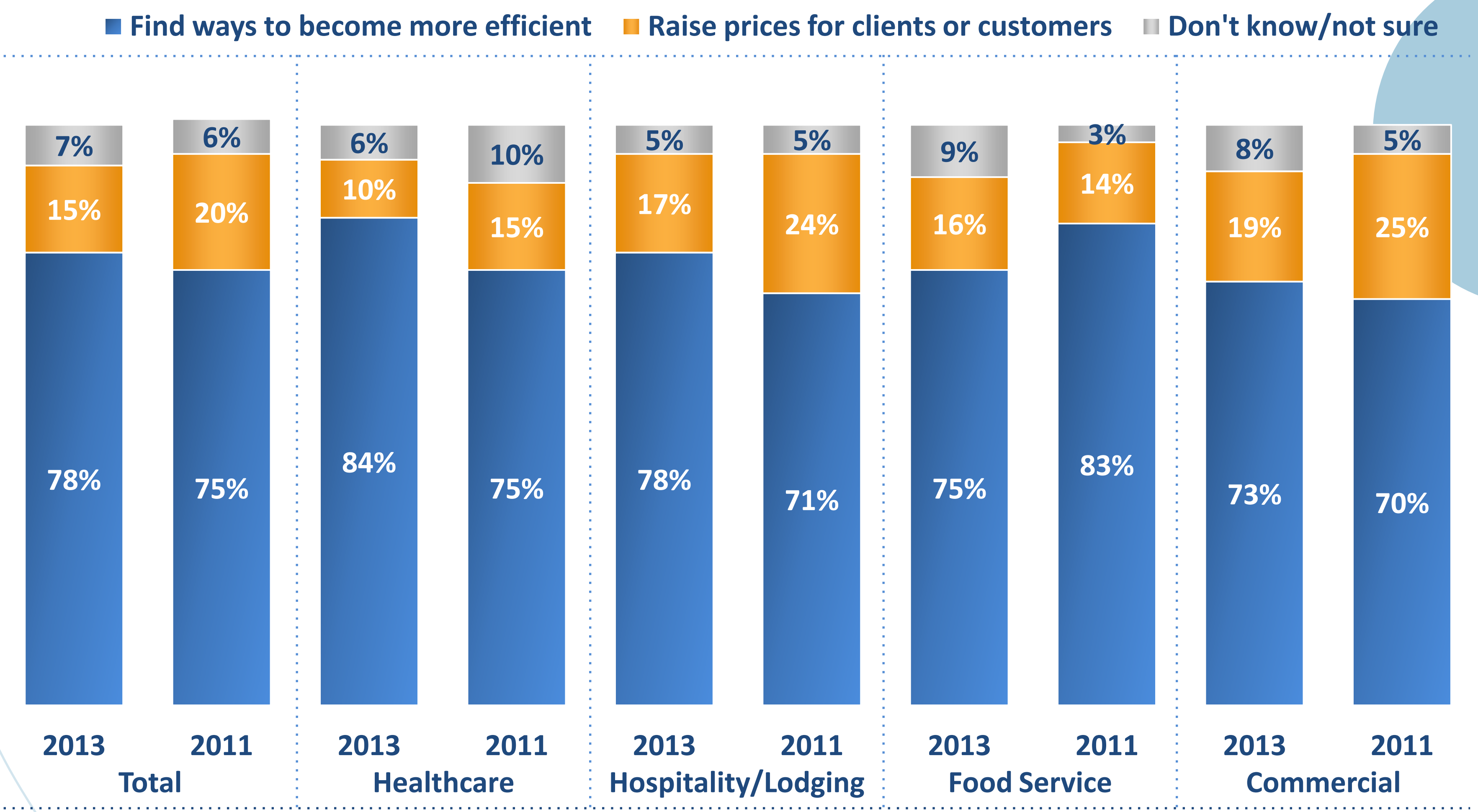
- By a margin of nearly 4 to 1, respondents indicate that it would be preferable for their business to improve their bottom line by finding ways to become more efficient, rather than raising their prices for clients or customers.



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=408); 2011 (n=400)

Improving the Bottom Line – Increasing Efficiency vs. Raising Costs: Trended

- As in 2011, finding ways to become more efficient remains the preferred way for businesses to improve their bottom line, rather than raising their prices for clients or customers, with those across most sectors (save Food Service) being slightly more likely to feel this way.



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=408); 2011 (n=400)

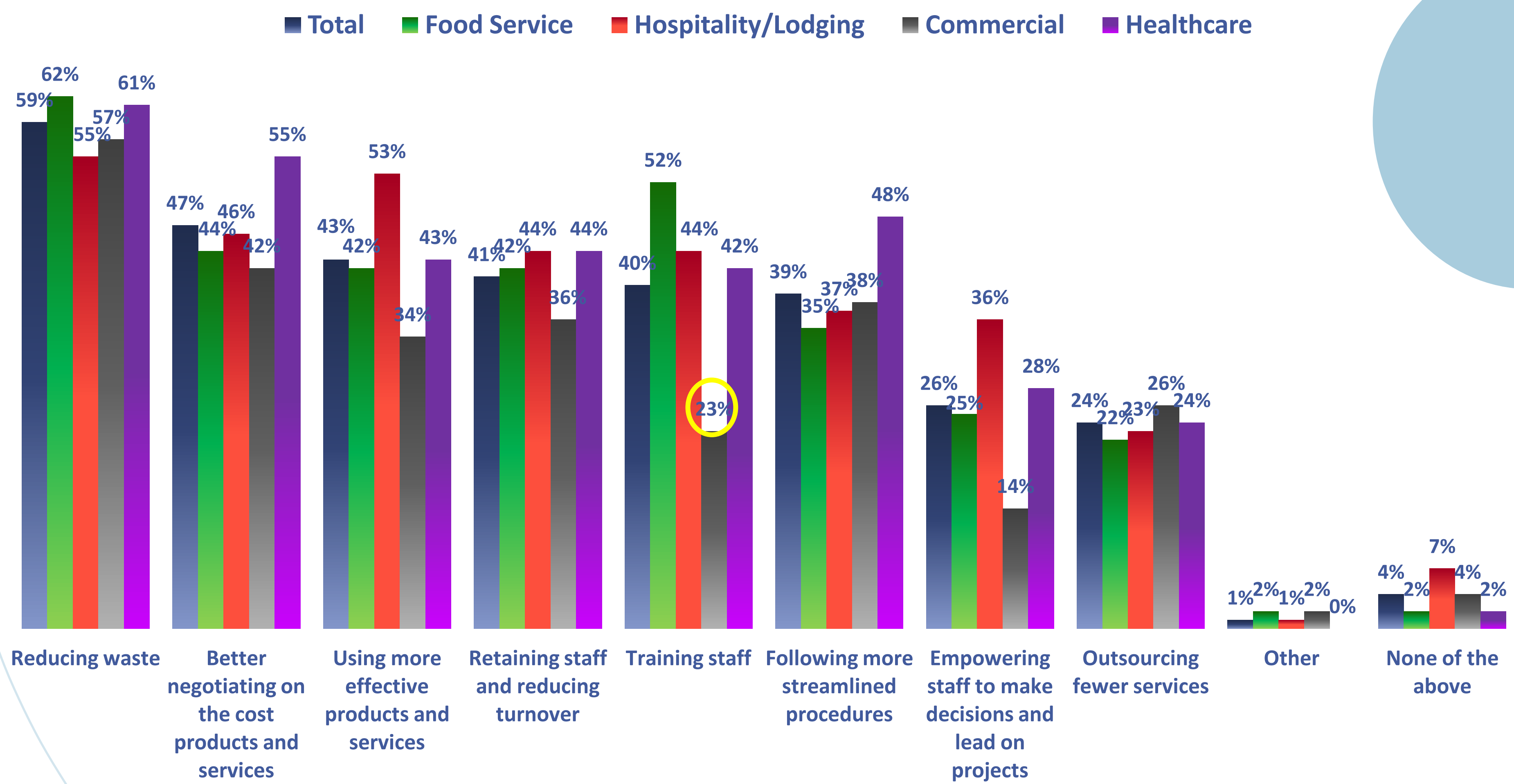
Ways of Increasing Efficiency: Overview

- Nearly six in ten respondents overall report that reducing waste as one of the ways in which their business has become more efficient over the past two years.
- Close to half select better negotiating on the cost of products and services as another way in which they have become more efficient, followed by using more effective products and services.

Q8a. Thinking about your business over the last 2 years, in which of the following ways, if any, do you feel it has become more efficient? (Please select all that apply)
Base: All Respondents (n=408)

Ways of Increasing Efficiency: Sector Comparisons

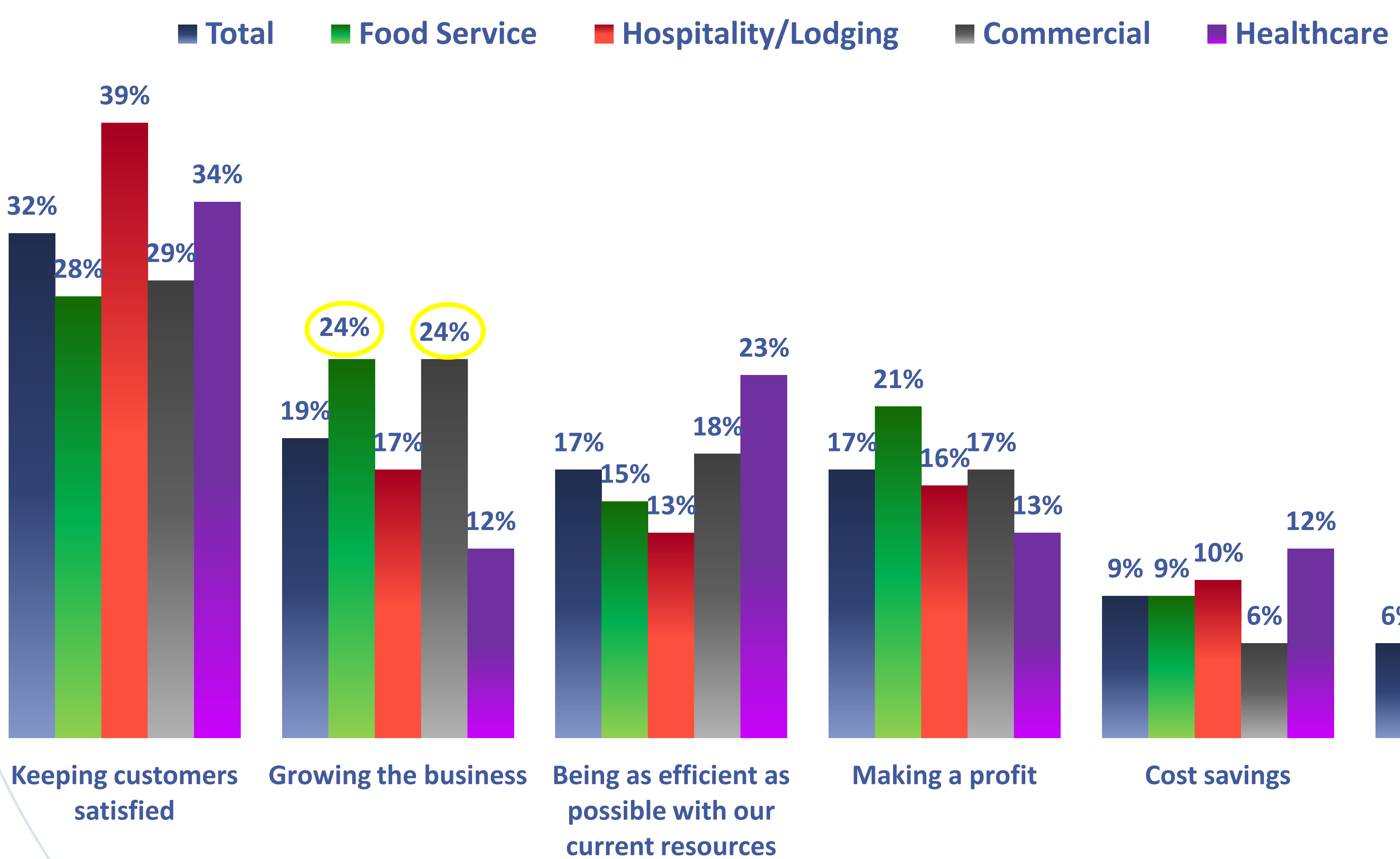
- While few differences emerge across sectors with respect to the ways in which efficiency is perceived to have increased over the last two years, just over two in ten in the Commercial sector choose training staff as one of these methods vs. over four in ten of those working in other sectors.



Q8a. Thinking about your business over the last 2 years, in which of the following ways, if any, do you feel it has become more efficient? (Please select all that apply)
Base: All Respondents (n=408)

Businesses' Areas of Focus: Sector Comparisons

- **Growing the business is viewed as being a priority for their business across sectors, but more so in the Food Service and Commercial sectors than in Healthcare, where being as efficient as possible with current resources is more likely to be the top area of focus.**



Q9. Which of the following do you feel is most important to your business right now? (Select one)
Base: All Respondents (n=408)

Businesses' Areas of Focus: Trended by Sector

- Respondents in most sectors tend to have similar views when it comes to the top priorities for their businesses in 2013 as they did in 2011, with keeping customers satisfied ranking at the top.
- However, far fewer Healthcare sector respondents select "Growing the business" as being the top area of focus in 2013 than in 2011.

	Total		Food Service		Hospitality/ Lodging		Commercial		Healthcare	
	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011
Keeping customers satisfied	32%	33%	28%	35%	39%	36%	29%	25%	34%	36%
Growing the business	19%	23%	24%	21%	17%	22%	24%	27%	12%	23%
Being as efficient as possible with our current resources	17%	17%	15%	14%	13%	12%	18%	22%	23%	21%
Making a profit	17%	15%	21%	19%	16%	16%	17%	16%	13%	9%
Cost savings	9%	9%	9%	7%	10%	11%	6%	8%	12%	8%
Staff retention *(*2011 question wording: Keeping all staff members employed)*	6%	3%	4%	4%	5%	3%	7%	2%	7%	3%

Q9. Which of the following do you feel is most important to your business right now? (Select one)
Base: All Respondents 2013 (n=408); 2011 (n=400)

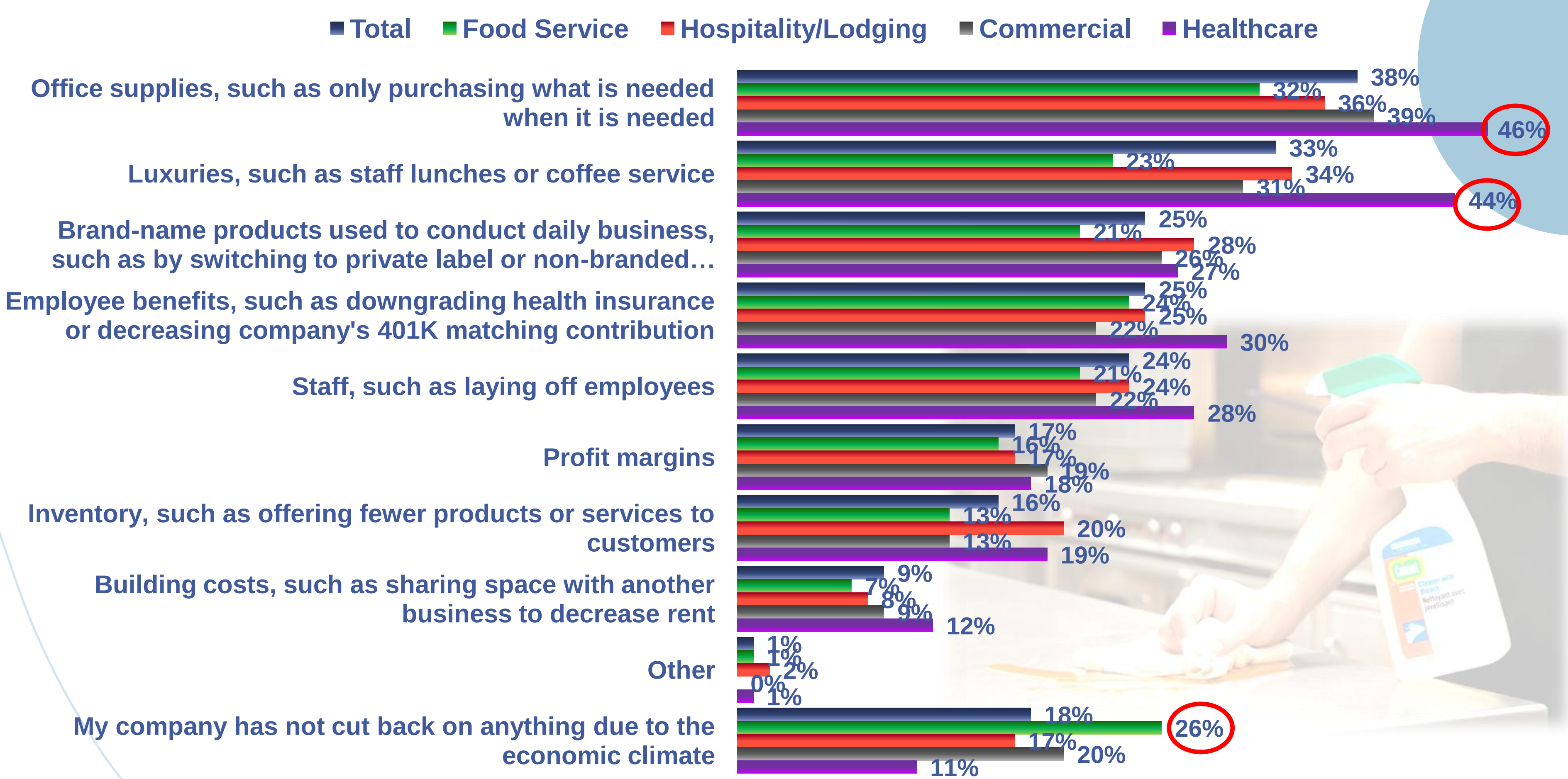
Cutbacks Made due to Economic Climate: Trended

- Generally, respondents report that they are making fewer cutbacks due to the economic climate than in 2011, with the exception of employee benefits. Smaller proportions in 2013 report that they are cutting back on office supplies, luxuries, profit margins, inventory, and building costs.

Q10. Which of the following has your business cut back on due to the current economic climate? Please choose all that apply.
Base: All Respondents (n=408); 2011 (n=400)

Cutbacks Made due to Economic Climate: Sector Comparisons

- While there are generally few differences among the sectors, several emerge between the Healthcare and Food Services sectors, with nearly half in the Healthcare sector identifying office supplies as an area in which such cutbacks are being made, vs. just three out of ten of those in the Food Service sector. Similarly, over four in ten in Healthcare deem luxuries as an area of cutbacks, compared to about two in ten of those in Food Service.
- In addition, one in four of those in Food Service report that their company has not cut back on anything vs. one in ten in Healthcare.



Q10. Which of the following has your business cut back on due to the current economic climate? Please choose all that apply.
Base: All Respondents 2013 (n=408); 2011 (n=400)

Cutbacks Made due to Economic Climate: Trended by Sector

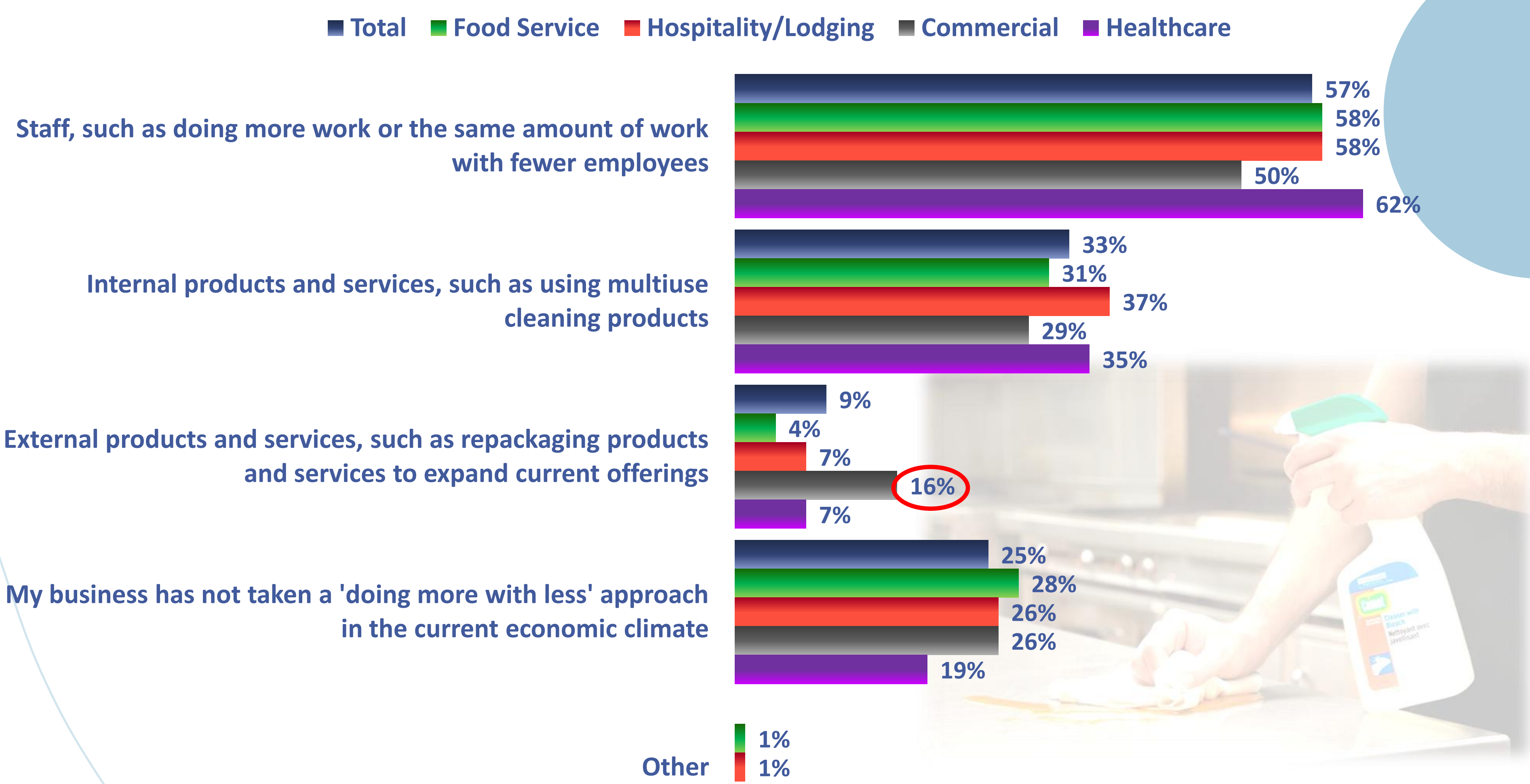
- While respondents in most sectors report fewer cutbacks in 2013 than in 2011, many of these decreases are not statistically significant. However, there was a notable drop in the Commercial sector with regard to cutbacks on luxury items like staff lunched or coffee service.

	Total		Food Service		Hospitality/ Lodging		Commercial		Healthcare	
	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011
Office supplies, such as only purchasing what is needed when it is needed	38%	50%	32%	45%	36%	49%	39%	49%	46%	58%
Luxuries, such as staff lunches or coffee service	33%	45%	23%	37%	34%	46%	31%	47%	44%	50%
Brand-name products used to conduct daily business, such as by switching to private label or non-branded products	25%	26%	21%	24%	28%	25%	26%	26%	27%	27%
Employee benefits, such as downgrading health insurance or decreasing company's 401K matching contribution	25%	24%	24%	20%	25%	32%	22%	23%	30%	21%
Staff, such as laying off employees	24%	29%	21%	28%	24%	35%	22%	33%	28%	21%
Profit margins	17%	23%	16%	25%	17%	25%	19%	25%	8%	18%
Inventory, such as offering fewer products or services to customers	16%	22%	13%	28%	20%	22%	13%	25%	19%	11%
Building costs, such as sharing space with another business to decrease rent	9%	14%	7%	10%	8%	14%	9%	17%	12%	13%
Other	1%	3%	1%	3%	2%	5%	-	1%	1%	4%
My company has not cut back on anything due to the economic climate	18%	14%	26%	17%	17%	14%	20%	9%	11%	17%

Q10. Which of the following has your business cut back on due to the current economic climate? Please choose all that apply.
Base: All Respondents 2013 (n=408); 2011 (n=400)

"Doing More with Less" Approach: Sector Comparisons

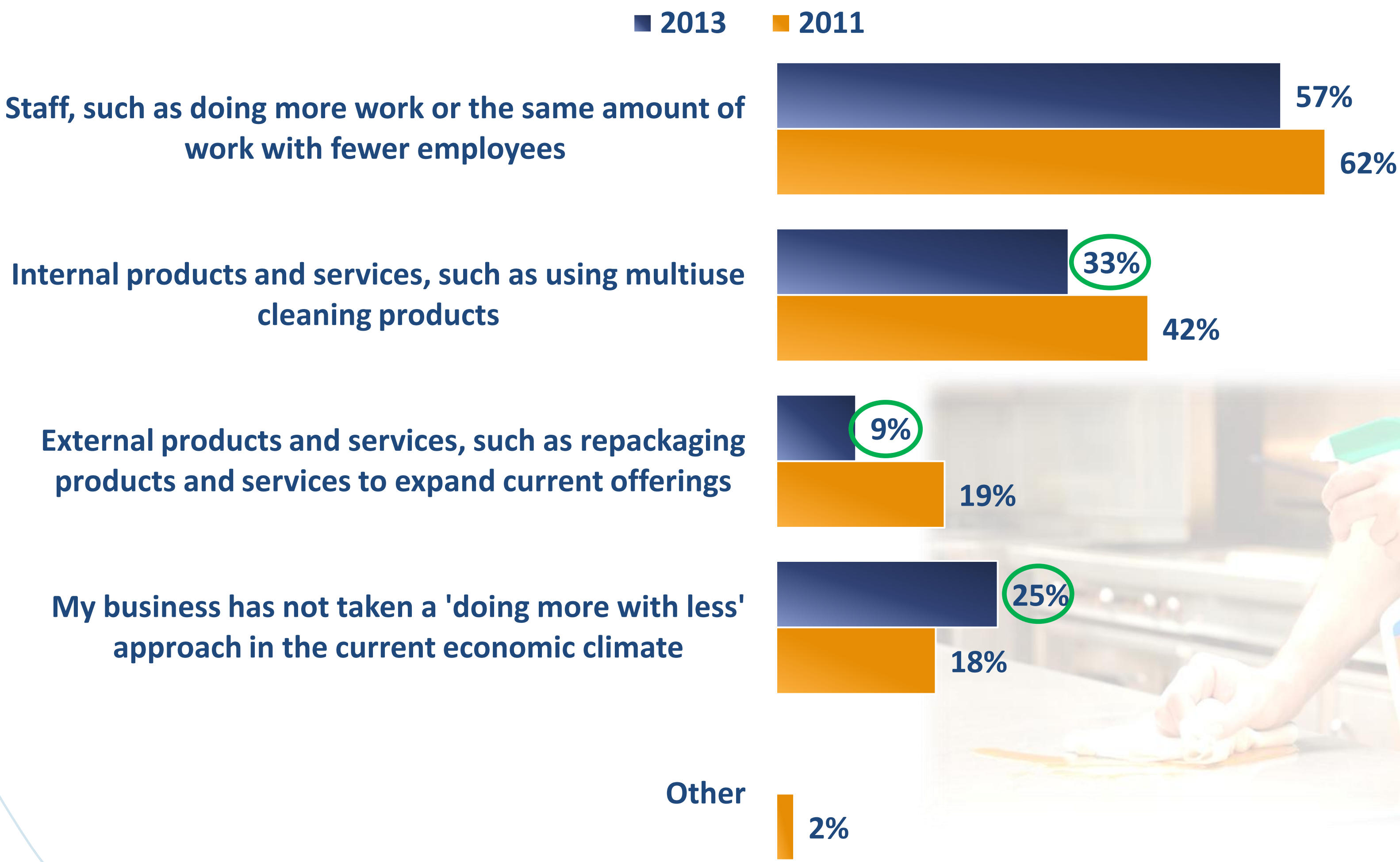
- Across sectors, the top way respondents say their businesses are doing more with less relates to relying on fewer staff, followed by making the most of internal products and services, such as using multi-use cleaning products.
- In the Commercial sector, respondents are more likely than those in other sectors to say that their company has been doing more with less when it comes to external products and services.



Q11. Due to the current economic climate, in which of the following areas, if any, do you feel your business has taken a "doing more with less" approach? Please choose all that apply.
Base: All Respondents (n=408)

“Doing More with Less” Approach: Trended

- Overall, fewer respondents report that their businesses are taking a “doing more with less” approach in each of the areas listed below, compared to those who did so in 2011 – particularly when it comes to both internal and external products and services.
- One-quarter of all respondents report that their business has not taken a “doing more with less” approach, up from 18% in 2011.



Q11. Due to the current economic climate, in which of the following areas, if any, do you feel your business has taken a “doing more with less” approach? Please choose all that apply.
Base: All Respondents ; 2013 (n=408); 2011 (n=400)

"Doing More with Less" Approach: Trended by Sector

- Across sectors, respondents aren't as likely in 2013 as they were in 2011 to say that they are trying to "do more with less" due to the economic climate. Declines are most notable in the Commercial sector with regard to both internal and external product and services, as well as in the Food Service sector when it comes to external products and services.

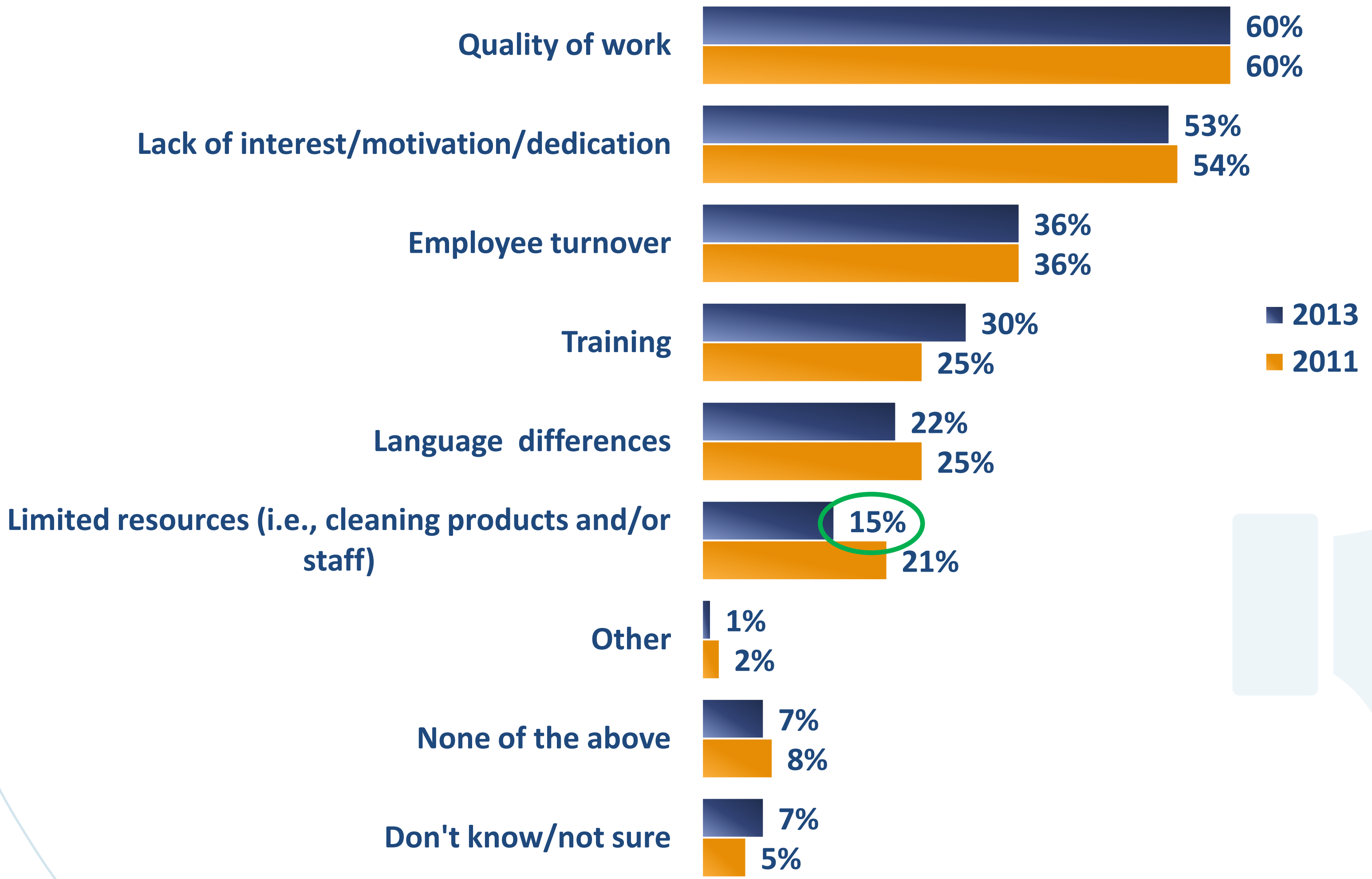
	Total		Food Service		Hospitality/ Lodging		Commercial		Healthcare	
	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011
Staff, such as doing more work or the same amount of work with fewer employees	57%	62%	58%	66%	58%	67%	50%	60%	62%	55%
Internal products and services, such as using multiuse cleaning products	33%	42%	31%	41%	37%	38%	29%	46%	35%	42%
External products and services, such as repackaging products and services to expand current offerings	9%	19%	4%	19%	7%	16%	16%	28%	7%	13%
Other	0%	2%	1%	1%	1%	1%	-	2%	-	3%
My business has not taken a 'doing more with less' approach in the current economic climate	25%	18%	28%	20%	26%	15%	26%	14%	19%	21%

Q11. Due to the current economic climate, in which of the following areas, if any, do you feel your business has taken a "doing more with less" approach? Please choose all that apply.
Base: All Respondents 2013 (n=408); 2011 (n=400)

Cleaning Staff

Top Three Challenges with Managing a Cleaning Staff Today: Trended

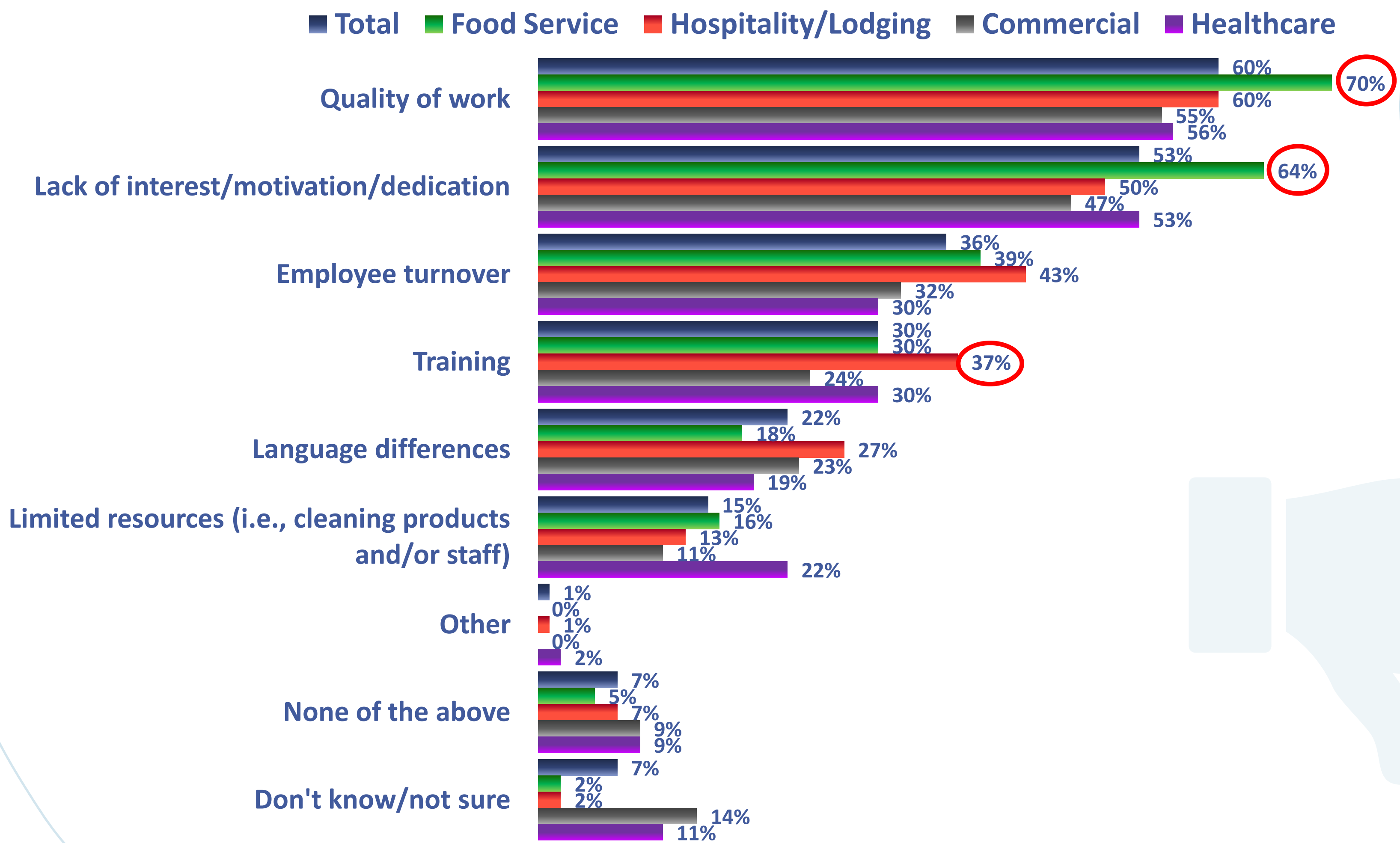
- The top three challenges with managing a cleaning staff today identified in 2013 are very similar to those from 2011: quality of work, lack of interest/motivation/dedication, and employee turnover.
- However, in 2013 fewer select limited resources as a top challenge vs. 2011.



Q12. Based on your experience, what are the top three (3) challenges with managing a cleaning staff today? (Please select up to three)
Base: All Respondents 2013 (n=408); 2011 (n=400)

Top Three Challenges with Managing a Cleaning Staff Today: Sector Comparisons

- **Across sectors, those in the Food Service sector are more likely to identify quality of work and lack of interest/motivation/dedication as being among the top challenges than those in other sectors.**



Q12. Based on your experience, what are the top three (3) challenges with managing a cleaning staff today? (Please select up to three)
Base: All Respondents (n=408)

Top Three Challenges with Managing a Cleaning Staff Today: Trended by Sector

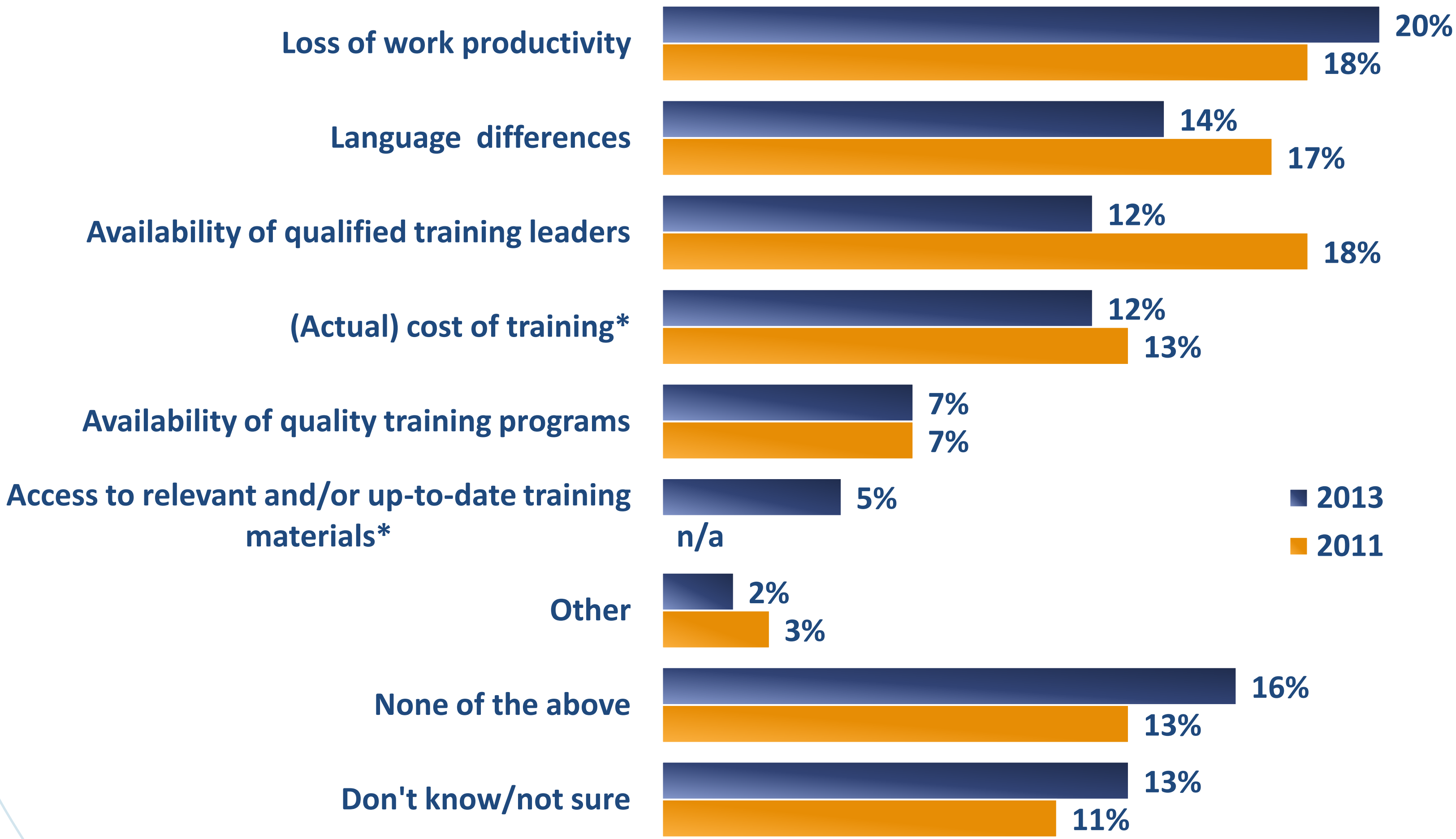
- Although the top three challenges with managing a cleaning staff today follow a generally similar pattern as 2011, several notable shifts within the individual sectors do emerge.
- “Lack of interest/motivation/dedication” is now perceived as a top challenge by only half of respondents in the Hospitality/Lodging sector vs. two-thirds in 2011.
- Another notable shift in the Commercial sector is the greater proportion citing “limited resources” as being among the top challenges in 2011 compared with 2013.

	Total		Food Service		Hospitality/ Lodging		Commercial		Healthcare	
	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011
Quality of work	60%	60%	70%	60%	60%	61%	55%	55%	56%	63%
Lack of interest/motivation/dedication	53%	54%	64%	54%	50%	66%	47%	50%	53%	47%
Employee turnover	36%	36%	39%	37%	43%	44%	32%	31%	30%	33%
Training	30%	25%	30%	24%	37%	28%	24%	24%	30%	25%
Language differences	22%	25%	18%	19%	27%	33%	23%	18%	19%	28%
Limited resources (i.e., cleaning products and/or staff)	15%	21%	16%	18%	13%	20%	11%	28%	22%	19%
Other	1%	2%	-	1%	1%	2%	-	2%	2%	3%
None of the above	7%	8%	5%	9%	7%	6%	9%	9%	9%	8%
Don't know/not sure	7%	5%	2%	6%	2%	1%	14%	8%	11%	5%

Q12. Based on your experience, what are the top three (3) challenges with managing a cleaning staff today? (Please select up to three)
Base: All Respondents (n=408); 2011 (n=400)

Biggest Challenge / Obstacle to Effective Cleaning- Related Training: Trended*

- While the biggest challenges associated with effective cleaning-related training in 2013 are generally similar to those identified in 2011, "loss of work productivity" is now deemed the top challenge by one in five respondents overall, ahead of both "language differences" and "availability of qualified leaders."

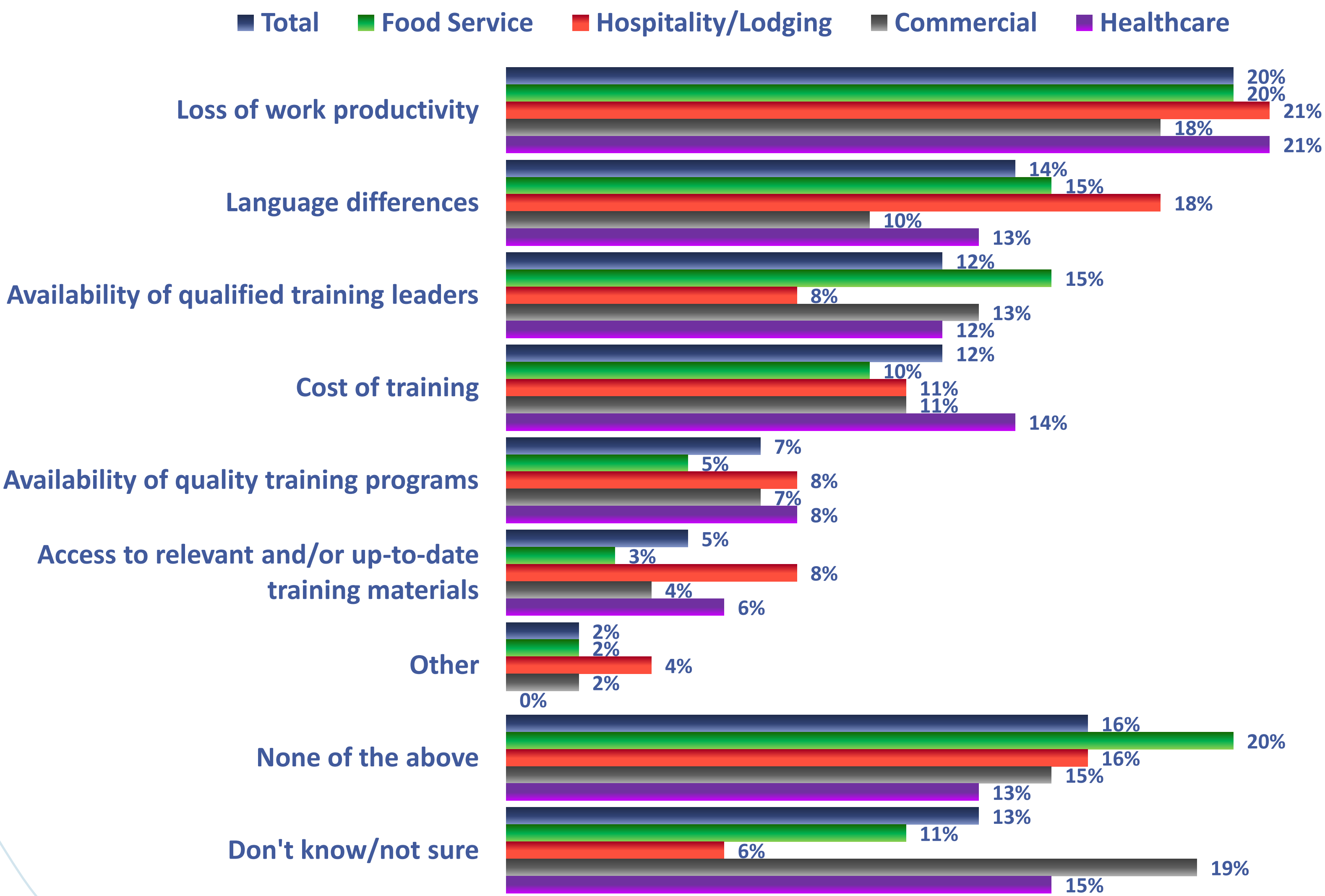


** Note: Differences in response options and wording limit comparability of 2011 and 2013.*

Q13. Based on your experience, which of the following is the biggest challenge/obstacle to effective cleaning-related training? Please select one.
Base: All Respondents (n=408); 2011 (n=400)

Biggest Challenge / Obstacle to Effective Cleaning- Related Training: Sector Comparisons

- **Few statistically significant differences emerge across sectors in terms of the biggest challenges associated with effective cleaning-related training.**



Q13. Based on your experience, which of the following is the biggest challenge/obstacle to effective cleaning-related training? (Please select one)
Base: All Respondents (n=408)

Biggest Challenge / Obstacle to Effective Cleaning- Related Training: Trended by Sector*

- Across sectors, there are few changes since 2011 as far as the challenges they are facing with managing a cleaning staff today; fewer in the Hospitality/Lodging sector select the "availability of qualified training leaders" as a top obstacle, while those in the Commercial sector are more likely to be unsure.

	Total		Food Service		Hospitality/ Lodging		Commercial		Healthcare	
	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011
Loss of work productivity	20%	18%	20%	17%	21%	18%	18%	19%	21%	18%
Language differences	14%	17%	15%	16%	18%	20%	10%	12%	13%	21%
Availability of qualified training leaders	12%	18%	15%	12%	8%	22%	13%	22%	12%	14%
(Actual) cost of training*	12%	13%	10%	17%	11%	12%	11%	15%	14%	7%
Availability of quality training programs	7%	7%	5%	6%	8%	7%	7%	6%	8%	10%
Access to relevant and/or up-to-date training materials*	5%	n/a	3%	n/a	8%	n/a	4%	n/a	6%	n/a
Other	2%	3%	2%	2%	4%	5%	2%	4%	-	1%
None of the above	16%	13%	20%	17%	16%	9%	15%	15%	13%	11%
Don't know/not sure	13%	11%	11%	13%	6%	7%	19%	7%	15%	18%

** Note: Differences in response options and wording limit comparability of 2011 and 2013.*

Q13. Based on your experience, which of the following is the biggest challenge/obstacle to effective cleaning-related training? (Please select one)
Base: All Respondents (n=408); 2011 (n=400)

Cleaning Products

Top-Ranked Factors in Importance to Decision-Making of Purchasing Cleaning Products: Trended by sector*

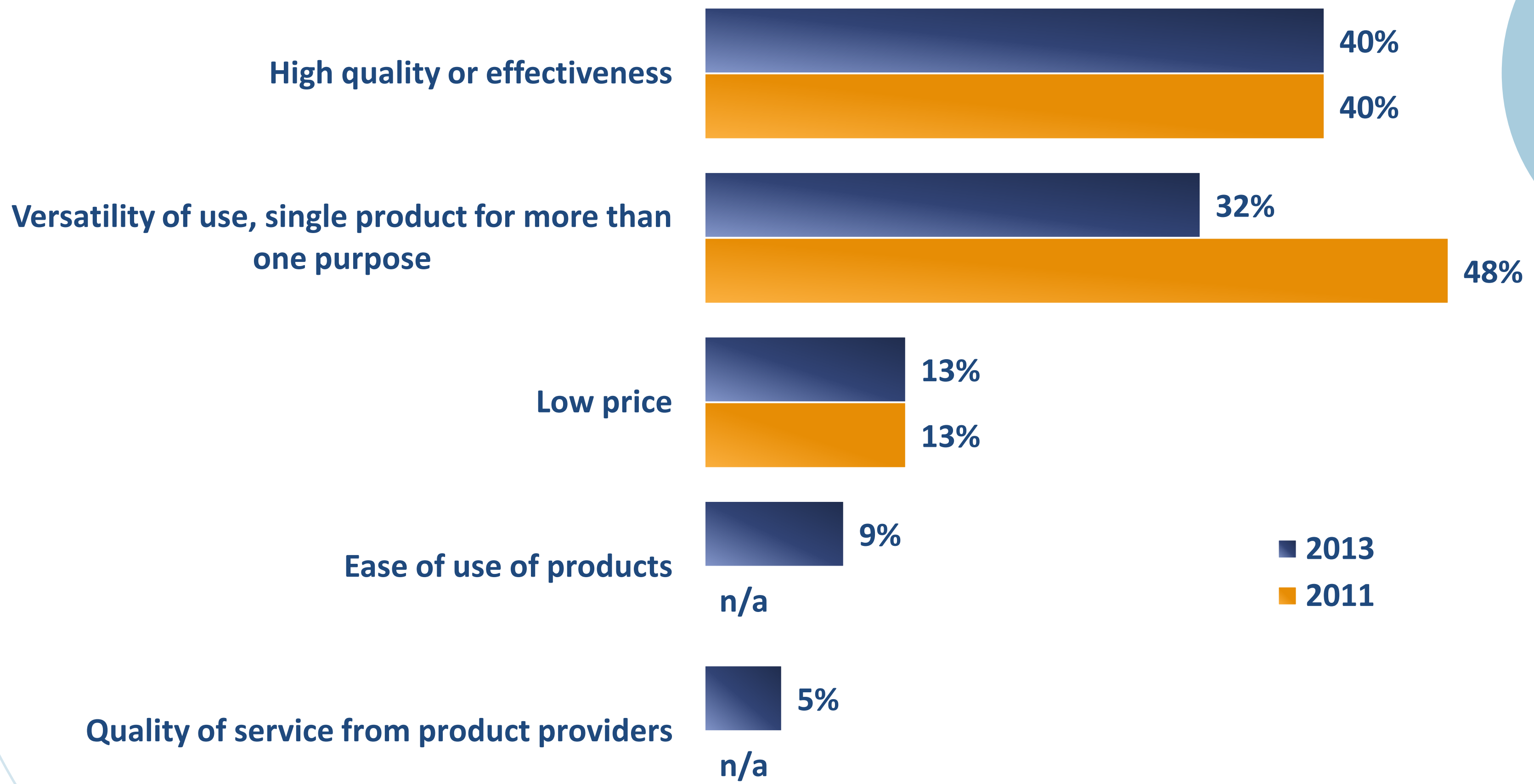
- "Product performance/efficacy" and "price" remain the two top-ranked factors in terms of importance to decision-makers when purchasing cleaning products in both 2011 and 2013, with few shifts emerging within sectors.
- Those in Hospitality/Lodging are considerably less likely to rank recommendation from employees as the top factor.
- However, those in the Commercial sector are now somewhat (but not significantly) more likely to select "product performance/efficacy" than in 2011, while those in the Healthcare sector are somewhat less likely to do so.

	Total		Food Service		Hospitality/ Lodging		Commercial		Healthcare	
	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011
Product performance/efficacy/ease-of-use	44%	44%	41%	41%	47%	46%	45%	34%	45%	54%
Price	31%	30%	36%	36%	30%	32%	32%	29%	27%	21%
Customer service/training provided by manufacturer	7%	6%	4%	6%	8%	4%	4%	7%	12%	5%
Impact on the environment	7%	6%	10%	4%	5%	5%	5%	9%	9%	7%
Brand or manufacturer reputation/loyalty	4%	5%	5%	2%	5%	3%	4%	10%	1%	5%
Recommendation from employees	3%	7%	3%	6%	1%	7%	7%	6%	2%	7%
Recommendation from distributor or sales representative	2%	3%	1%	3%	3%	2%	3%	4%	3%	1%
Other	1%	1%	1%	2%	1%	1%	1%	1%	1%	-

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. (Ranked #1)
Base: All Respondents (n=408); 2011 (n=400)

Defining “Value” in Cleaning Products: Trended*

- As in 2011, respondents are most likely to associate “value” in cleaning products with “high quality or effectiveness.”
- While fewer respondents overall select “versatility of use” as a defining value, this decrease may be attributed at least in part to the addition of two new response options in 2013 (“ease of use of products” and “quality of service from product providers”).

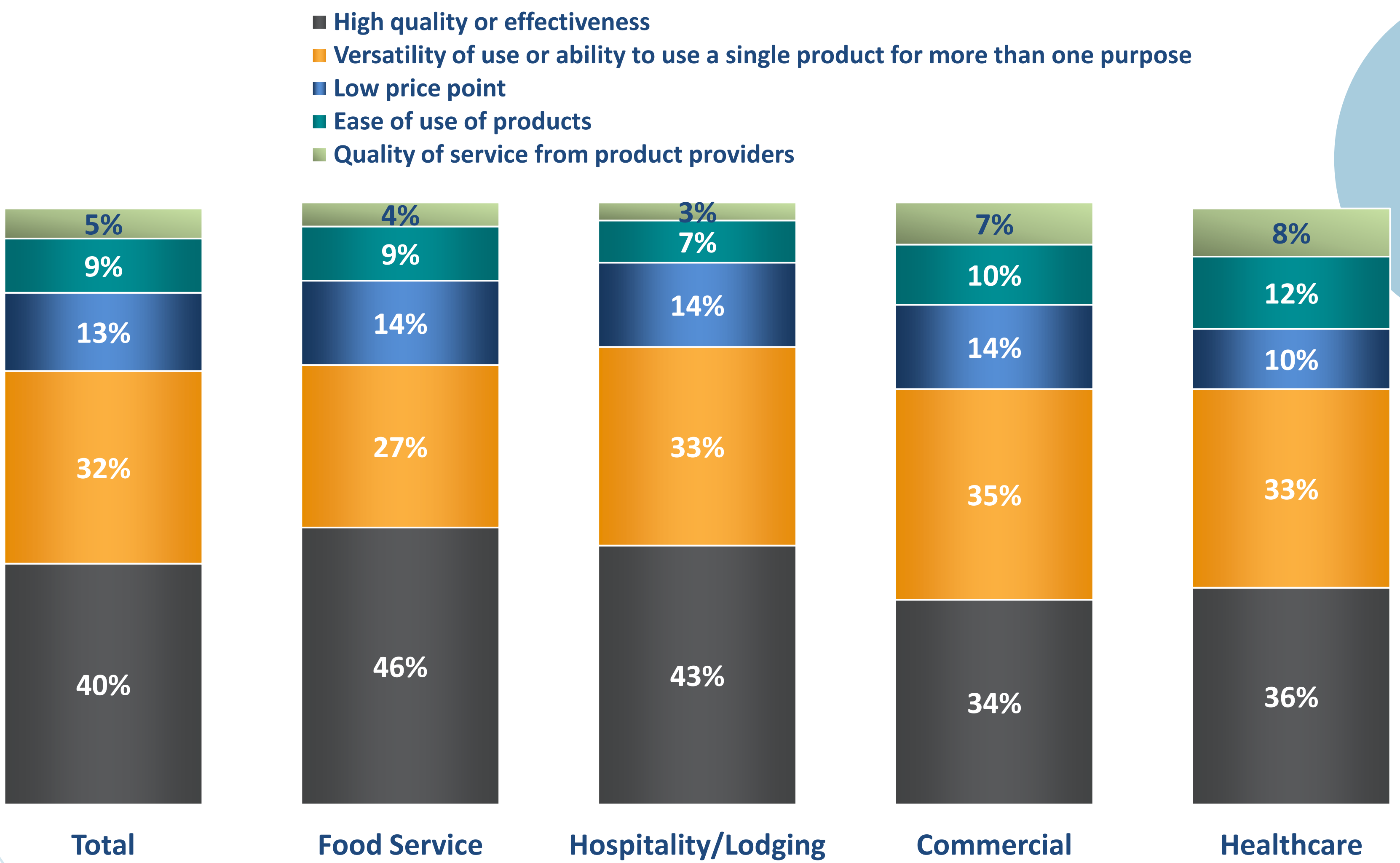


** Note: Differences in response options and wording limit comparability of 2011 and 2013.*

Q17. When it comes to the cleaning products you use within your business, which of the following do you feel best defines “value?” (Select one)
Base: All Respondents (n=408); 2011 (n=400)

Defining "Value" in Cleaning Products: Sector comparisons

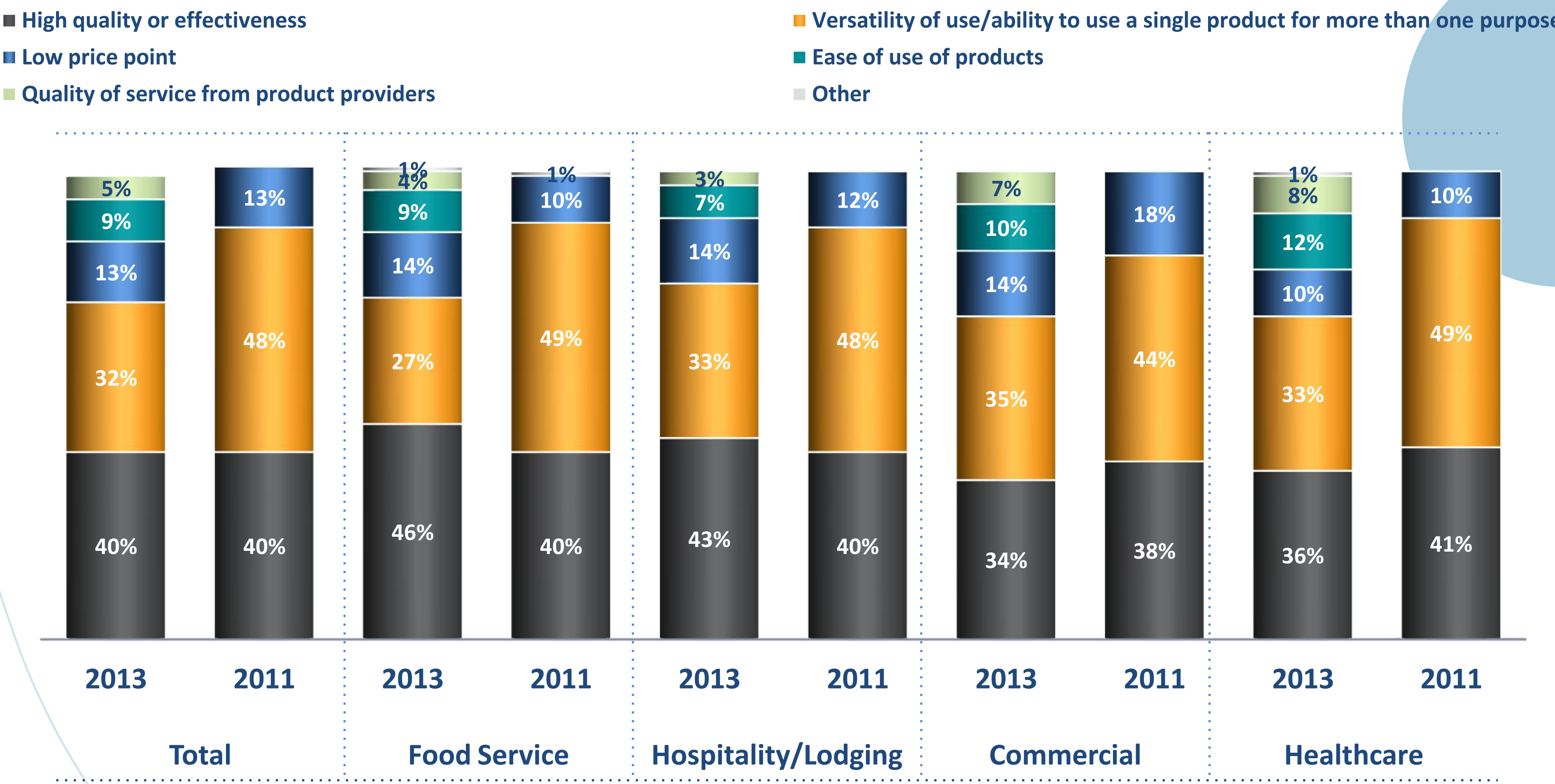
- No significant differences emerge across sectors in terms of what best defines the best value of a cleaning product; "high quality or effectiveness" and "versatility of use" are the top definitions of value, with low price point, ease of use and quality of service from product providers falling into a second tier.



Q17. When it comes to the cleaning products you use within your business, which of the following do you feel best defines "value?" (Select one)
Base: All Respondents (n=408); 2011 (n=400)

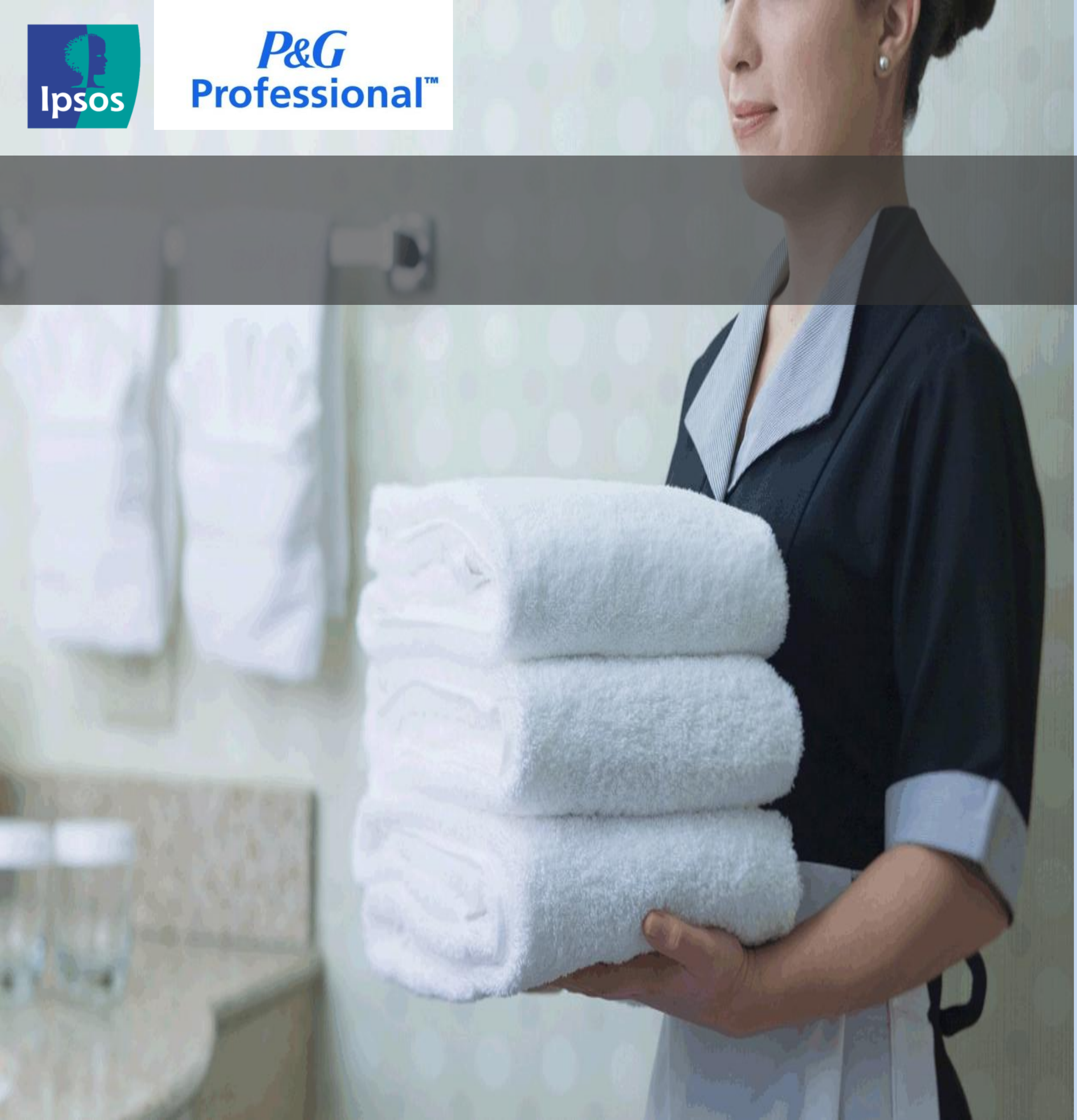
Defining "Value" in Cleaning Products: Trended by Sector*

- Across all 4 sectors, "high quality/effectiveness" and "versatility of use" remain the most commonly selected definitions when it comes to value of cleaning products.
- The addition of two new response options in 2013 ("ease of use of products" and "quality of service from product providers") limits the comparability of 2011 and 2013; these two new options combined account for over one in five of the responses selected.



** Note: Differences in response options and wording limit comparability of 2011 and 2013.*

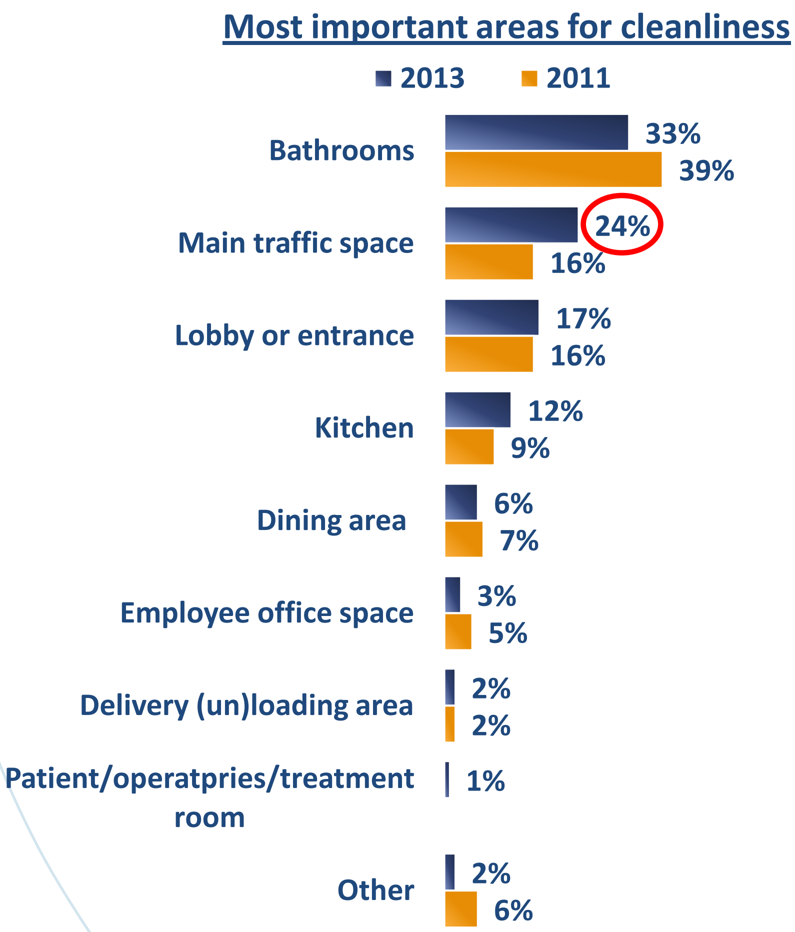
Q17. When it comes to the cleaning products you use within your business, which of the following do you feel best defines "value?" (Select one)
Base: All Respondents (n= 408); 2011 (n=400)

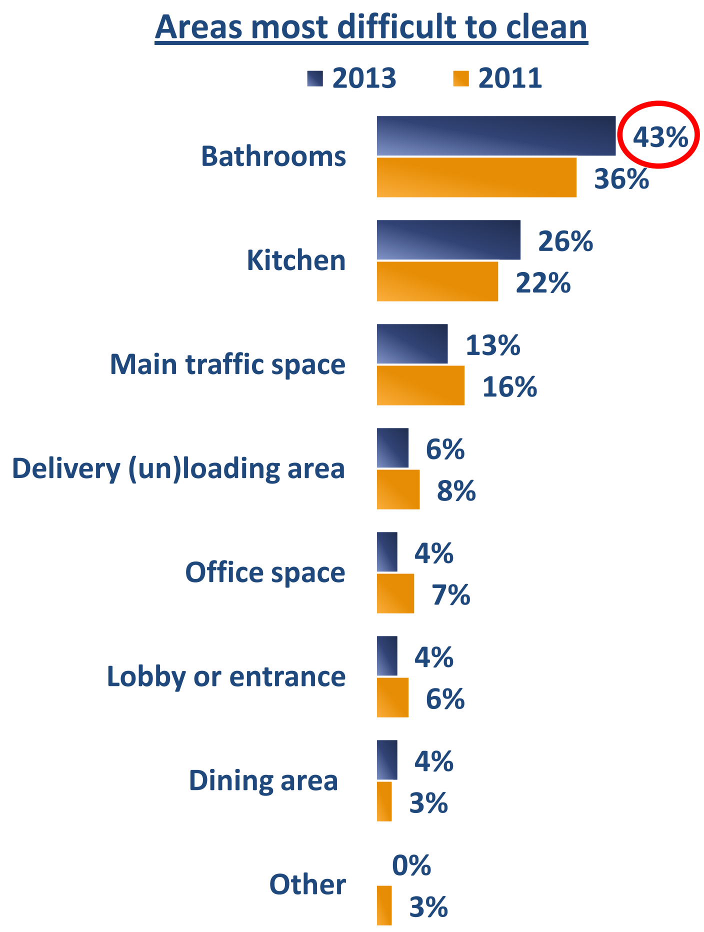


Cleaning

Most Important / Most Difficult Areas to Clean: Trended

- Although there are many similarities in 2013 and 2011 in terms of the areas which respondents identify as being the most important to clean, as well as those which are the most difficult, some notable differences do emerge:
- While bathrooms remain the both most important area to clean across all sectors, this area is also considered the most difficult to clean – even more so in 2013 than in 2011.
- Additionally, more respondents in 2013 select the main traffic space to be the most important area for cleanliness than in 2011,



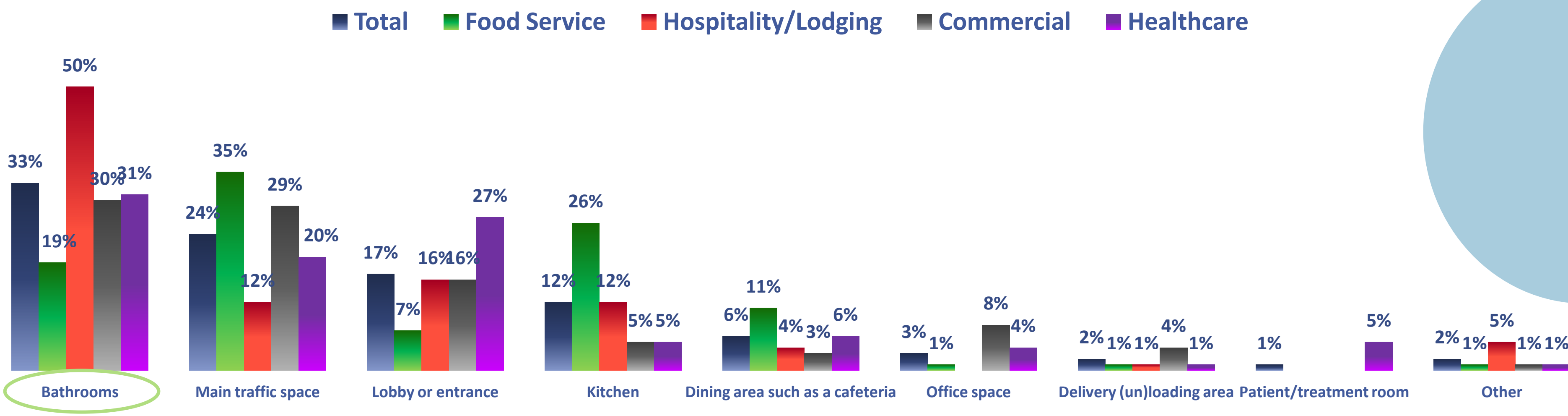


Q18. In your opinion, the cleanliness of which of the following areas is most important to your customers? (Select one) Base: All Respondents 2013 (n=408); 2011 (n=400)
Q19. In your opinion, which of the following areas is usually the most difficult to clean? (Select one) Base: All Respondents 2013 (n=408); 2011 (n=400)

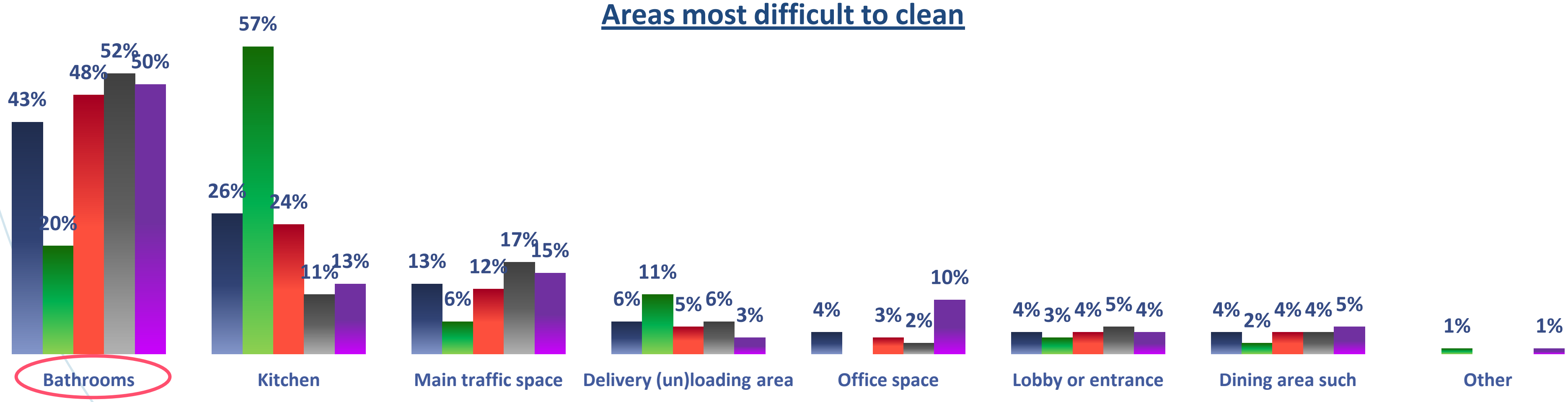
Most Important / Most Difficult Areas to Clean: Sector Comparisons

- In most sectors, bathrooms are a critical area, ranked the most important to clean (particularly in the Hospitality and Lodging sector) and most difficult to clean. However, those in Food Service are more likely to say that the main traffic space and kitchens are more important to keep clean, and that the kitchen is most difficult to clean.

Most important areas for cleanliness



Areas most difficult to clean



Q18. In your opinion, the cleanliness of which of the following areas is most important to your customers? (Select one)
Base: All Respondents (n=); 2011 (n=400)
Q19. In your opinion, which of the following areas is usually the most difficult to clean? (Select one) Base: All Respondents (n=); 2011 (n=400)

Most Important / Most Difficult Areas to Clean: Trended by Sector

- **The few shifts between 2011 and 2013 are most notable in the Commercial and Food Service sectors. Nearly three in ten from the Commercial sector deem the main traffic space as the most important area to keep clean, nearly twice as many as in 2011. These respondents are also now more likely to say that bathrooms are most difficult to clean, while fewer find the delivery area to be the hardest.**
- **In the Food Service sector, nearly six in ten say that the kitchen is the most difficult to clean vs. four in ten in 2011; however, just one in twenty respondents in this sector deem the main traffic space as most difficult to clean, compared to one in five who did so in 2011.**

Most Important	Total		Food Service		Hospitality/ Lodging		Commercial		Healthcare	
	2013	**2011**	**2013**	**2011**	**2013**	**2011**	**2013**	**2011**	**2013**	**2011**
Bathrooms	33%	39%	19%	27%	50%	55%	30%	35%	31%	40%
Main traffic space	24%	16%	35%	25%	12%	11%	29%	13%	20%	13%
Lobby or entrance	17%	16%	7%	8%	16%	14%	16%	20%	27%	23%
Kitchen	12%	9%	26%	21%	12%	6%	5%	4%	5%	6%
Dining area	6%	7%	11%	16%	4%	4%	3%	6%	6%	2%
Employee office space	3%	5%	1%	-	-	3%	8%	12%	4%	5%
Delivery (un)loading area	2%	2%	1%	-	1%	-	4%	5%	1%	2%
Patient/ treatment room	1%	-	-	-	-	-	-	-	5%	-
Other	2%	6%	1%	3%	5%	7%	1%	5%	1%	9%
Don't know/ Not Sure	1%	-	-	-	-	-	4%	-	-	-
Most Difficult										
Bathrooms	43%	36%	20%	26%	48%	44%	52%	28%	50%	45%
Kitchen	26%	22%	57%	41%	24%	23%	11%	14%	13%	10%
Main traffic space	13%	16%	6%	19%	12%	9%	17%	18%	15%	19%
Delivery (un)loading area	6%	8%	11%	8%	5%	4%	6%	15%	3%	4%
Employee office space	4%	7%	-	2%	3%	6%	2%	8%	10%	11%
Lobby or entrance	4%	6%	3%	1%	4%	7%	5%	11%	4%	4%
Dining area	4%	3%	2%	2%	4%	5%	4%	3%	5%	3%
Other	0%	3%	1%	1%	-	2%	-	3%	1%	4%
Don't know/ Not Sure	1%	-		-		-	3%	-		-

Q18. In your opinion, the cleanliness of which of the following areas is most important to your customers? (Select one)
Base: All Respondents (n=408); 2011 (n=400)
Q19. In your opinion, which of the following areas is usually the most difficult to clean? (Select one) Base: All Respondents (n=408); 2011 (n=400)

Helpful Factors for Performing Cleaning Services: Trended

- Respondents in both 2011 and 2013 are most likely to say that products getting the job done the first time is most helpful in terms of performing cleaning services (even more so now than two years ago), followed by using products that work quickly, and having a simpler routine that all staff can get accustomed to.

Q20. In your opinion, which of the following would be most helpful when it comes to performing your cleaning services? (Select up to two)
Base: All Respondents (n=408); 2011 (n=400)

Helpful Factors for Performing Cleaning Services: Comparisons by Sector

- About two-thirds of those in the Food Service sector consider “products that get the job done the first time” to be among their top two, a significantly higher proportion than those in the Commercial and Healthcare Sectors.
- “Simple training procedures” are more likely to be viewed as helpful in the Hospitality/Lodging sector than the Food Service sector.
- While mentioned by only a few, a significantly greater proportion of those in Hospitality/Lodging consider “an education cleaning resource that my staff can tap into anytime for advice” to be useful vs. the Commercial sector.

Q20. In your opinion, which of the following would be most helpful when it comes to performing your cleaning services? (Select up to two)
Base: All Respondents (n=408)

Helpful Factors for Performing Cleaning Services: Trended by Sector

- Attitudes in terms of what is most helpful in providing cleaning services in 2013 are on par with those in 2011.

	Total		Food Service		Hospitality/ Lodging		Commercial		Healthcare	
	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011
Products that get the job done the first time	54%	47%	65%	55%	57%	46%	45%	39%	50%	47%
Products that work quickly	33%	30%	37%	34%	32%	29%	29%	32%	36%	26%
A simpler routine that all staff can get accustomed to	22%	25%	21%	25%	24%	28%	26%	23%	19%	24%
Better processes or systems that work for my specific environment	15%	14%	12%	7%	14%	14%	15%	17%	19%	16%
More staff available to clean	14%	18%	14%	17%	12%	22%	12%	14%	18%	18%
Simple training procedures	10%	10%	5%	6%	13%	15%	10%	10%	10%	8%
An educational cleaning resource that my staff can tap into anytime for advice	2%	4%	4%	4%	3%	2%	3%	8%	-	3%
Information from a brand I trust	2%	3%	2%	2%	-	3%	4%	5%	2%	2%
Other	-	2%	-	2%	-	4%	-	1%	-	
Don't know/Not sure	-	-	-	-	-	-	1%	-	1%	-

Q20. In your opinion, which of the following would be most helpful when it comes to performing your cleaning services? (Select up to two)
Base: All Respondents (n=408); 2011 (n=400)

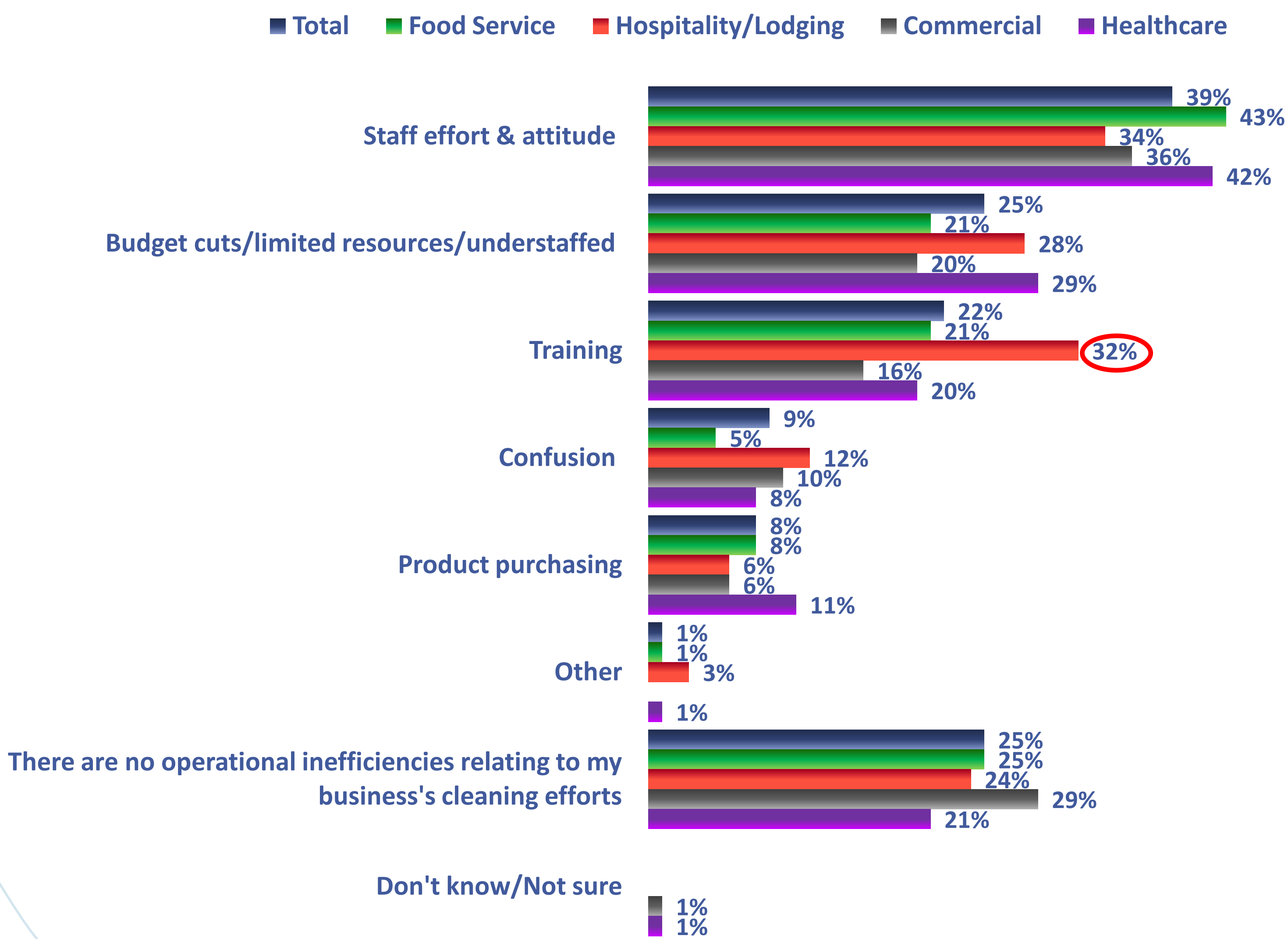
What's Preventing the Cleaning Department from Running as Smoothly as Possible: Trended

- As in 2011, four in ten respondents report that "staff effort and attitude" prevents their cleaning departments from running as smoothly as possible, while fewer select both "budget cuts/limited resources" and "training" in 2013 vs. 2011.
- In contrast, more report that are no operational inefficiencies relating to their businesses' cleaning efforts in 2013 compared to 2011.

Q21. Which of the following, if any, prevents your business' cleaning department from running as smoothly as possible? (Select all that apply)
Base: All Respondents (n= 408); 2011 (n=400)

What's Preventing the Cleaning Department from Running as Smoothly as Possible: Sector Comparisons

- Respondents across sectors hold similar views when it comes to barriers preventing their cleaning departments from running more smoothly. However, those in the Hospitality/Lodging sector are more likely to identify training as one such obstacle.



Q21. Which of the following, if any, prevents your business' cleaning department from running as smoothly as possible? (Select all that apply)
Base: All Respondents (n=408)

What's Preventing the Cleaning Department from Running as Smoothly as Possible: Trended by Sector

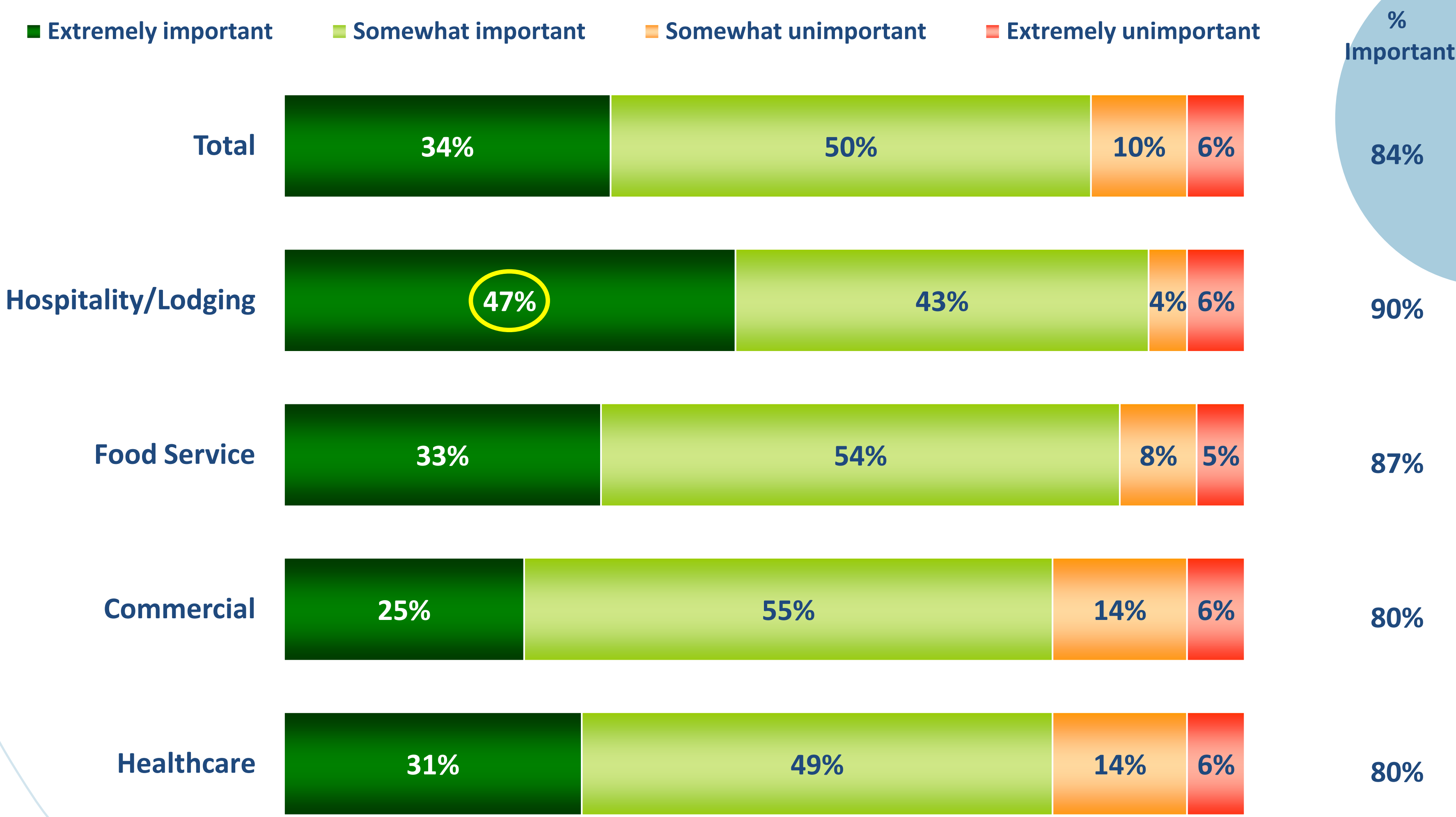
- Within sectors, there are a few significant shifts between 2011 and 2013 when it comes to factors preventing their cleaning departments from running as smoothly as possible.
- In both the Food Service and the Commercial sectors , fewer now select "budget cuts/limited resources" as obstacles in 2013, and Food Service sector respondents are also less likely to see inadequate training as preventing things from running more smoothly.

	Total		Food Service		Hospitality/ Lodging		Commercial		Healthcare	
	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011
Staff effort & attitude - unhappy or unmotivated employees keep us from being efficient	39%	39%	43%	40%	34%	43%	36%	32%	42%	42%
Budget cuts/limited resources/understaffed - while our staff and resources have been cut, our responsibilities have remained the same	25%	35%	21%	34%	28%	38%	20%	41%	29%	27%
Training - with staff turnover, training on proper cleaning is always a challenge	22%	30%	21%	34%	32%	31%	16%	27%	20%	29%
Confusion - we have so many products, it's difficult to remember what does what	9%	9%	5%	9%	12%	5%	10%	7%	8%	16%
Product purchasing - we often buy too many cleaning products	8%	7%	8%	4%	6%	8%	6%	7%	11%	7%
Other	1%	2%	1%	1%	3%	2%	-	2%	1%	1%
There are no operational inefficiencies relating to my business's cleaning efforts	25%	17%	25%	22%	24%	13%	29%	20%	21%	14%
Don't know/Not sure	0%	-	-	-	-	-	1%	-	1%	-

Q21. Which of the following, if any, prevents your business' cleaning department from running as smoothly as possible? (Select all that apply)
Base: All Respondents (n=408); 2011 (n=400)

Importance of Feedback from Personnel about Cleaning Products: Sector Comparisons

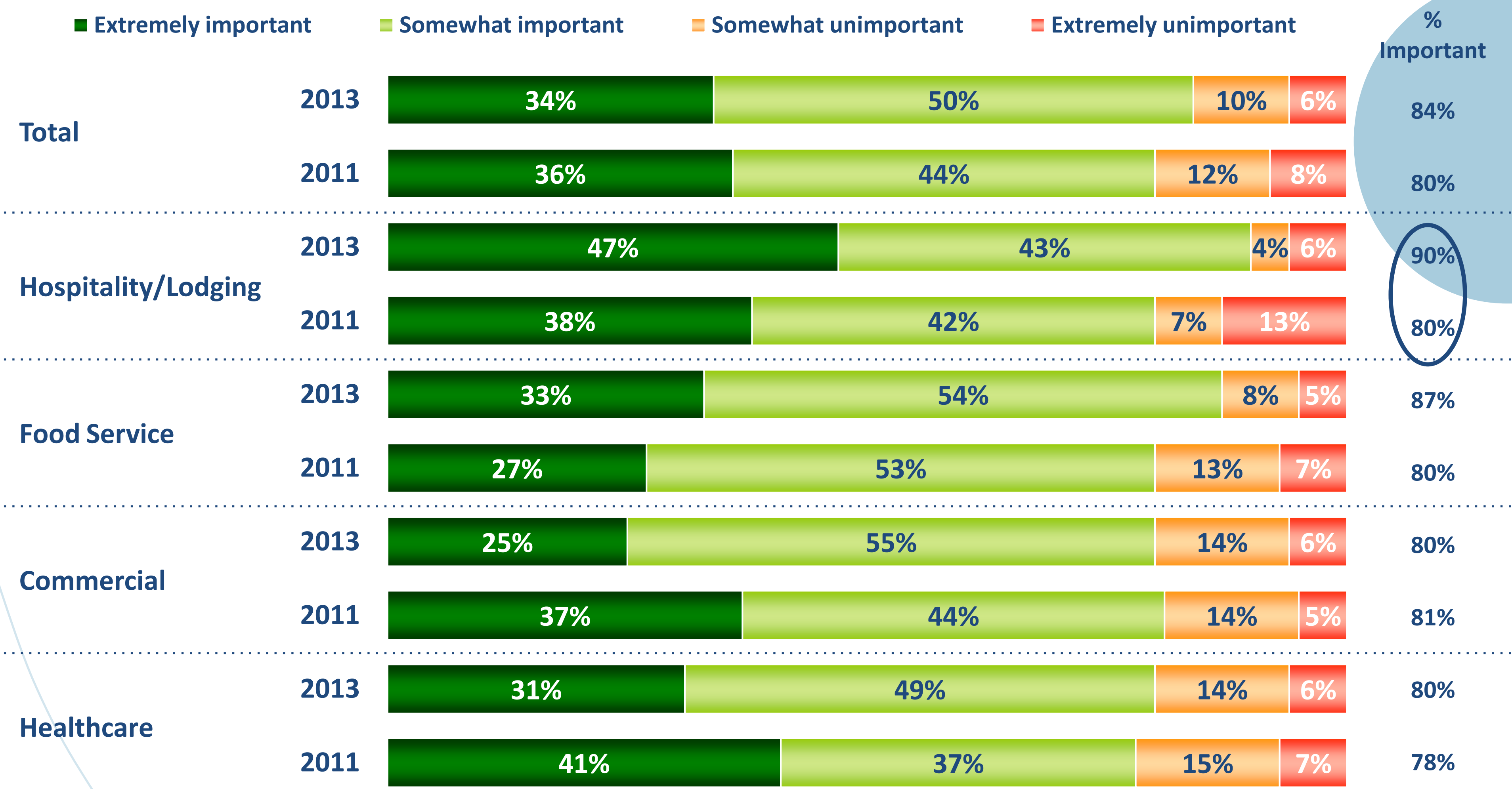
- Over eight in ten respondents overall indicate that the opinions and feedback of cleaning personnel regarding the products being used is important, including a third who say that it is *extremely* important.
- Nearly half of those in the Hospitality/Lodging sector deeming such opinions and feedback to be *extremely* important – more so than in other sectors.



Q23. In your organization, how important are the opinions and feedback of cleaning personnel regarding the products being used?
Base: All Respondents (n=408)

Importance of Feedback from Personnel about Cleaning Products: Trended by Sector

- When comparing 2011 and 2013, views regarding the importance of feedback remain generally unchanged within sectors, with the exception of Hospitality/Lodging, where respondents are now more likely to find these opinions to be *extremely* important.

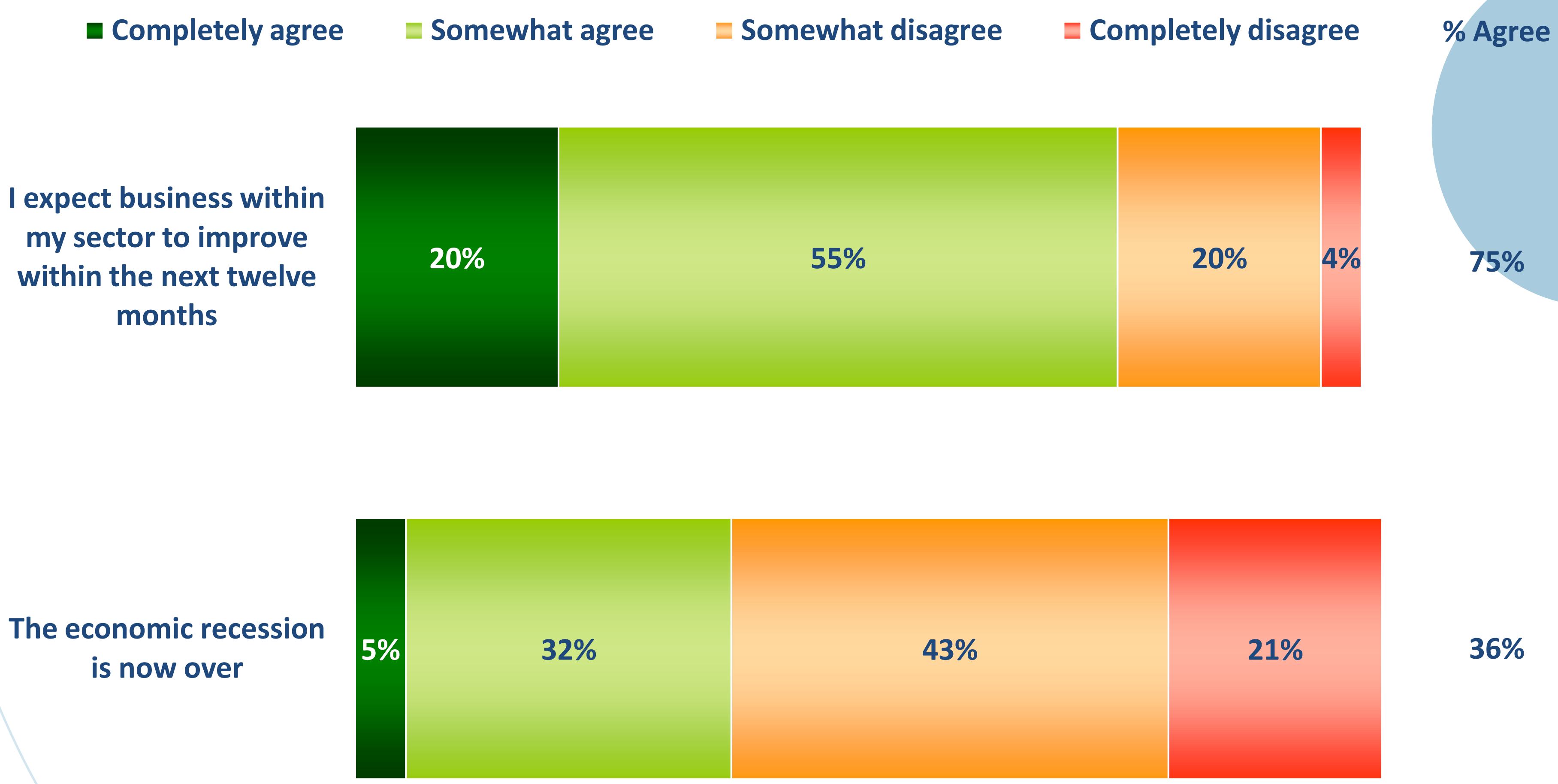


Q23. In your organization, how important are the opinions and feedback of cleaning personnel regarding the products being used?
Base: All Respondents (n=408); 2011 (n=400)

Causes of Concern

Perceptions of Current Economic Climate

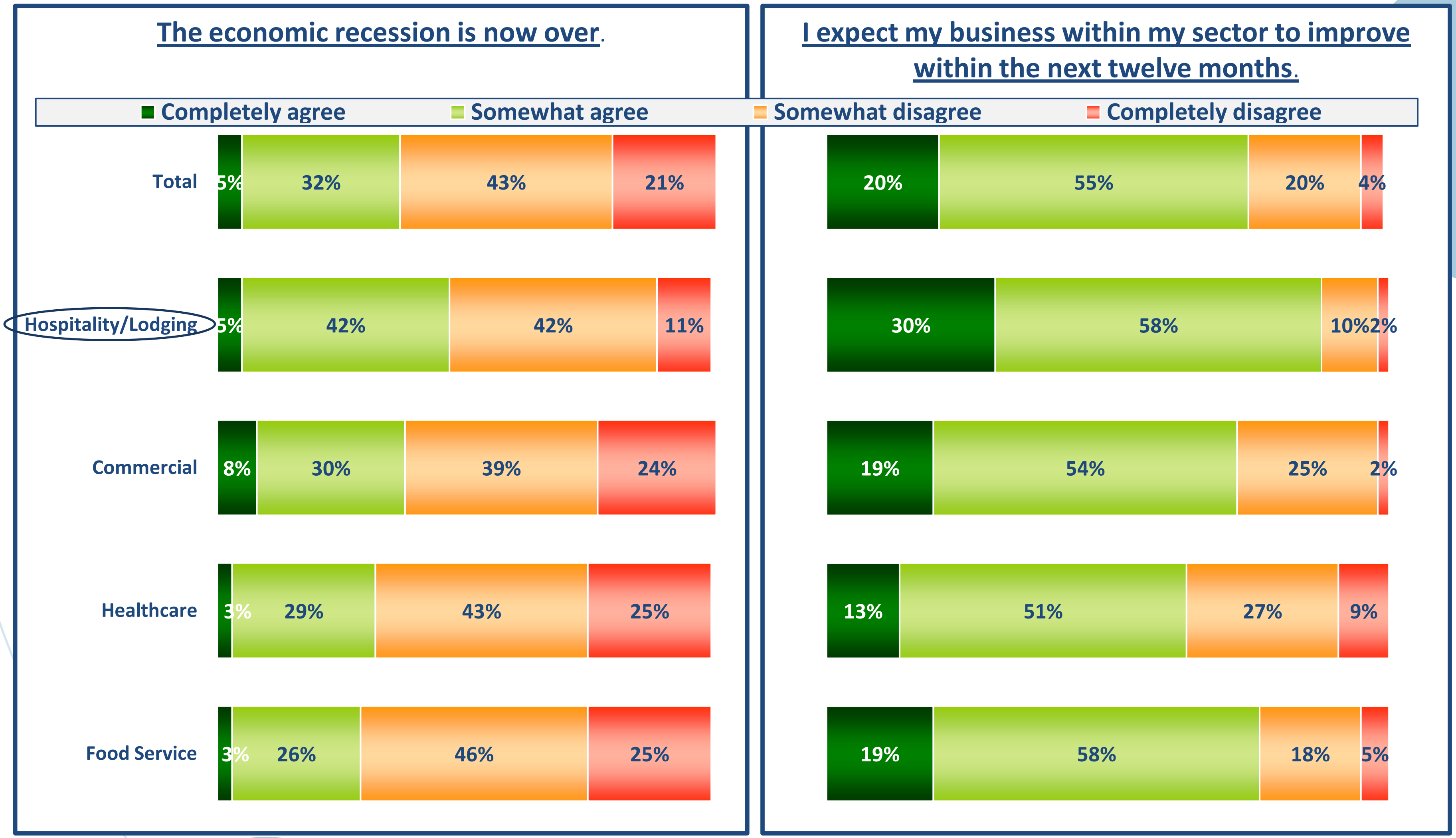
- Though only about a third feel that the recession is over, three quarters expect business within their sector to improve within the next twelve months.



Q24. To what extent do you agree or disagree with the following statements?
Base: All Respondents (n=408)

Perceptions of Current Economic Climate: Sector Comparisons

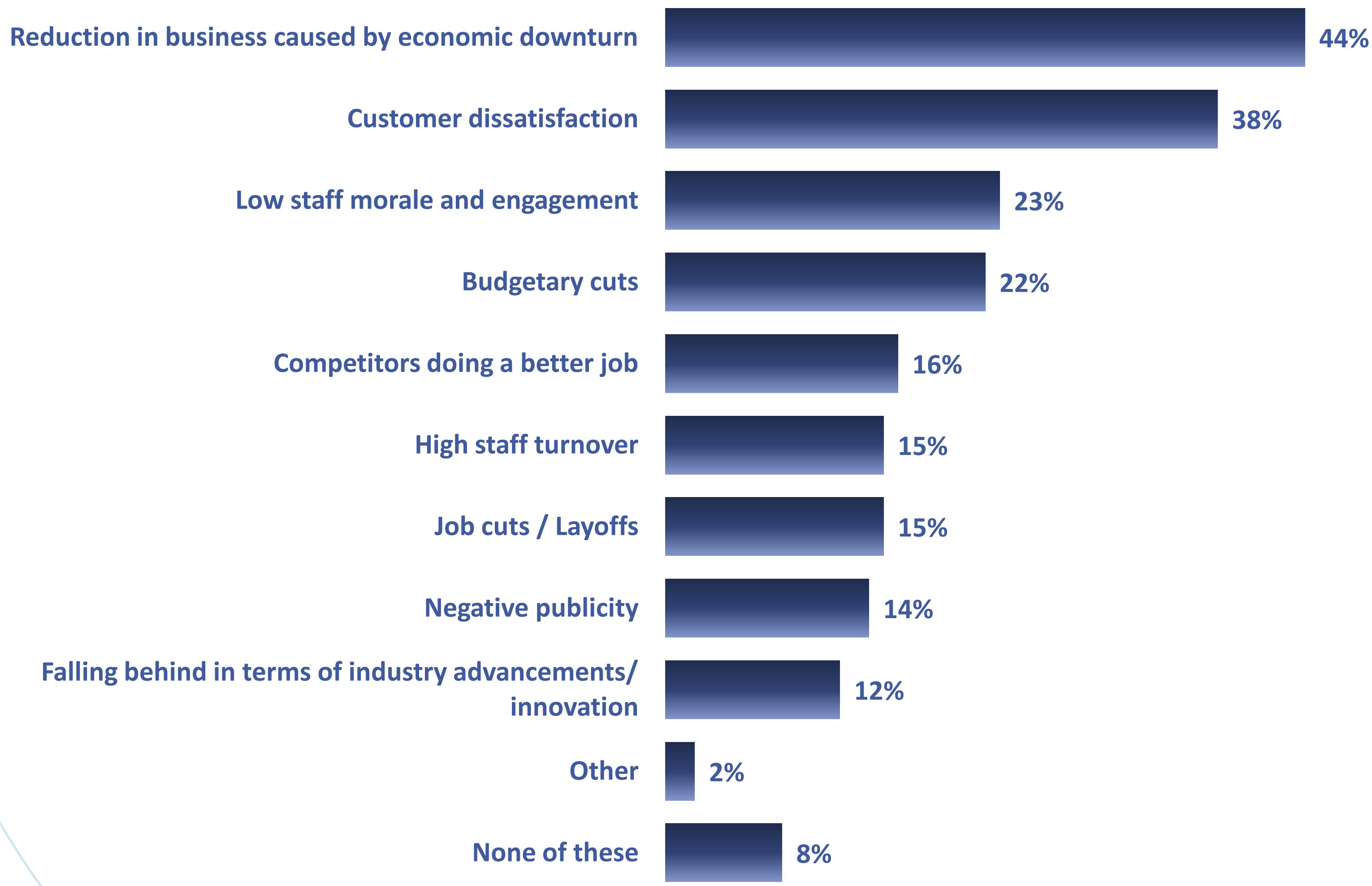
- Those in the Hospitality/Lodging sector tend to be the most optimistic in terms of their perceptions of the current economic climate: nearly nine in ten expect business within their sector to improve within the next twelve months, a significantly greater proportion than those in any other sector.
- Similarly, nearly half of these respondents also believe that the economic recession is now over.



Q23. In your organization, how important are the opinions and feedback of cleaning personnel regarding the products being used?
Base: All Respondents (n=408)

Causes of Worry Regarding Business in General: Overview

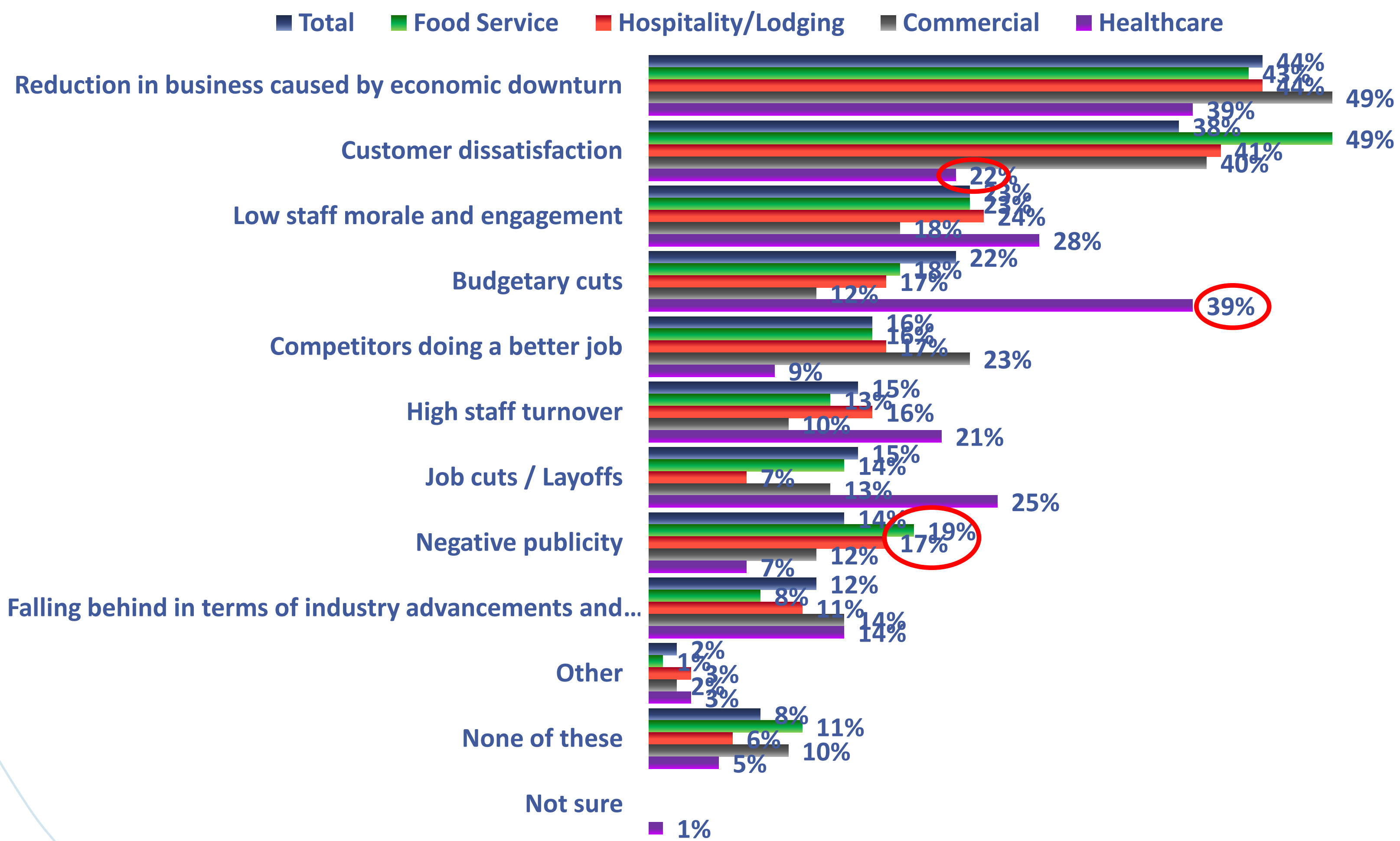
- For over four in ten of all respondents, a "reduction in business caused by economic downturn" is identified as one of the top three causes of worry when thinking about their business in general, while just under four in ten consider "customer dissatisfaction" as worrisome. Roughly one in five also worry about "low staff morale and engagement."



Q25. Thinking about your business in general, which of the following, if any, causes you to worry? (Please select up to three)
Base: All Respondents (n=408)

Causes of Worry Regarding Business in General: Sector Comparisons

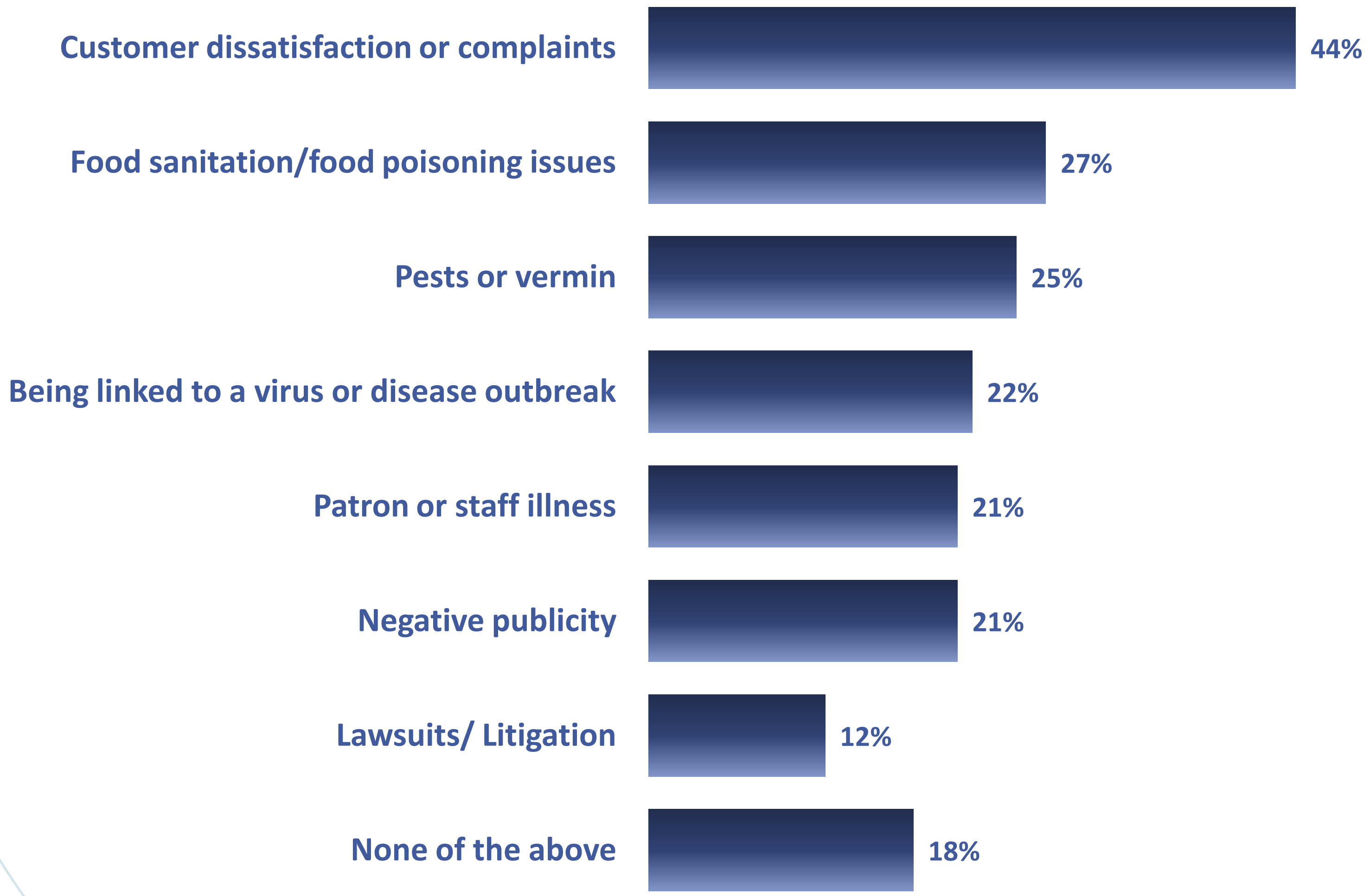
- Only half as many of respondents in the Healthcare sector identify customer dissatisfaction as a source of worry compared to the other sectors; however, these respondents are more likely to be concerned about budgetary cuts and job cuts and layoffs than are respondents in other sectors.
- In contrast, negative publicity is more likely to be a concern among those in the Food Service and Hospitality/Lodging sectors vs. Healthcare.



Q25. Thinking about your business in general, which of the following, if any, causes you to worry? (Please select up to three)
Base: All Respondents (n=408)

Worries about Cleaning/Disinfection: Overview

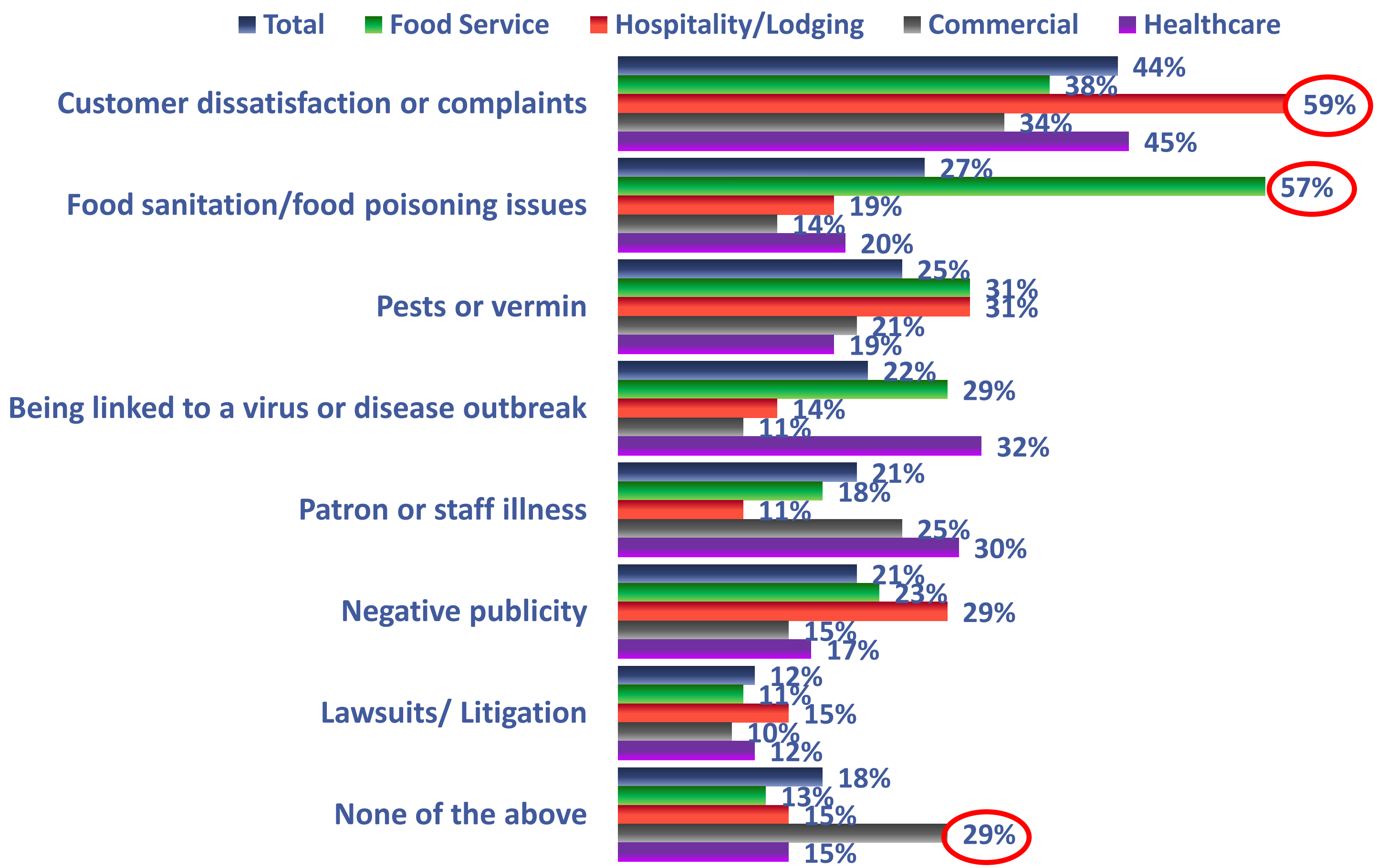
- In terms of the top three business concerns about cleaning or disinfection, over four in ten respondents overall are concerned about customer dissatisfaction or complaints, while both food sanitation/food poisoning issues and pests or vermin are each mentioned by one-quarter of respondents.



Q26. Please think specifically about cleaning or disinfection as it relates to your business. Which of the following, if any, causes you to worry? (Please select up to three)
Base: All Respondents (n=408)

Worries about Cleaning/Disinfection: Sector Comparisons

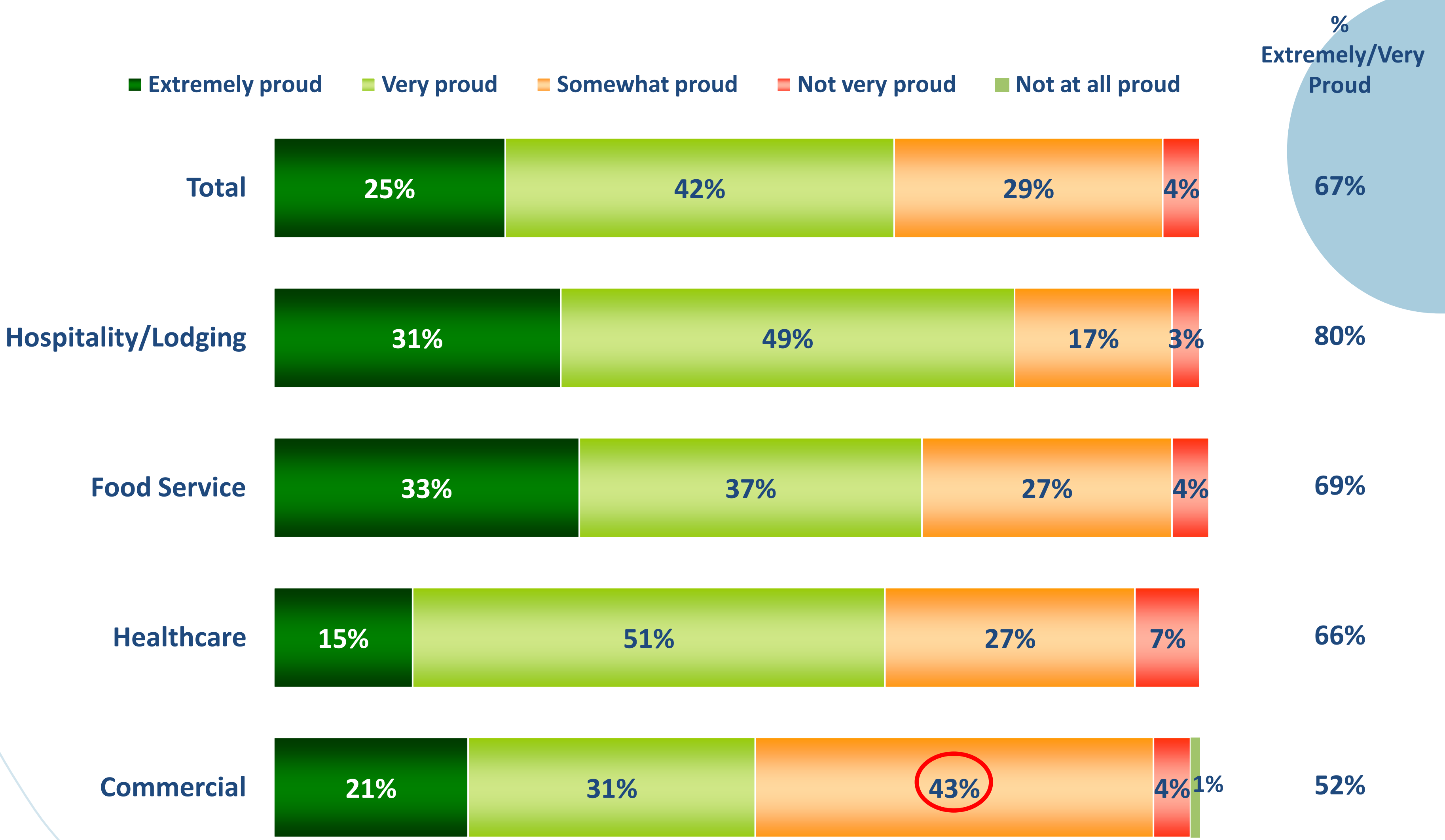
- About six in ten of those in the Hospitality/Lodging sector are concerned about customers dissatisfaction or complaints, while fewer than half of those in the other sectors identify this as a concern.
- Food sanitation or food poisoning issues are a particular concern among those in the Food Service sector; over twice as many respondents in this sector identify this as a worry than do those from other sectors.
- However, respondents in the Commercial sector are considerably less likely to identify that any of the concerns listed as a source of worry.



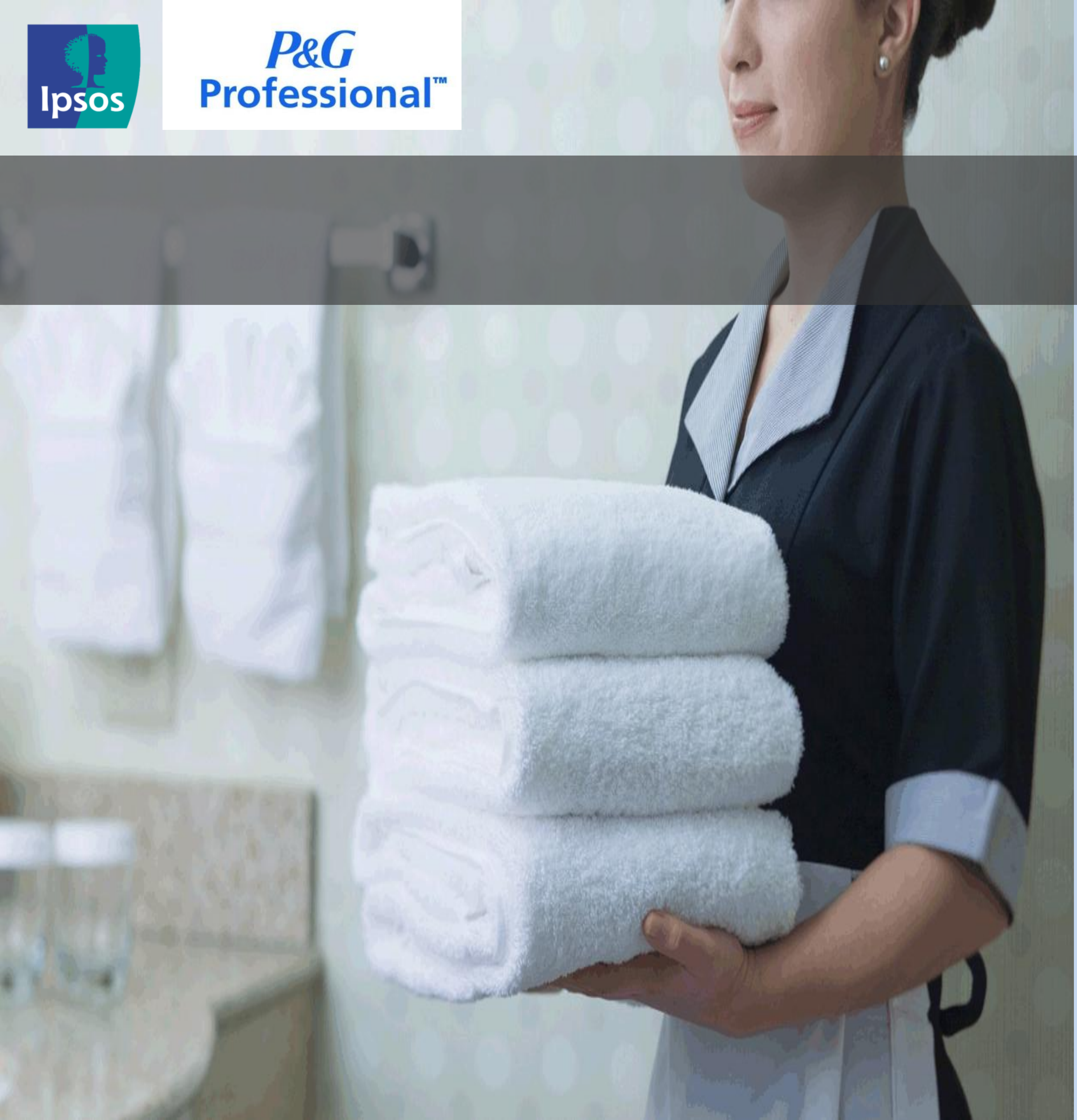
Q26. Please think specifically about <u>cleaning or disinfection</u> as it relates to your business. Which of the following, if any, causes you to worry? (Please select up to three)
Base: All Respondents (n=408)

Degree of Pride in Business's Cleanliness, Hygiene, and Cleaning Procedures: Sector Comparisons

- Two-thirds of respondents overall are very or extremely proud of their business's cleanliness, hygiene, and cleaning procedures.
- Those in the Hospitality/Lodging sector are particularly proud of their business's procedures, compared to those in either the Healthcare and particularly in the Commercial sector.



Q27. Overall, how proud are you of your business's cleanliness, hygiene and cleaning procedures?
Base: All Respondents (n=408)



Demographics

Job title/Function

	Total	Food Service	Hospitality/ Lodging	Commercial	Healthcare
Owner/operator/proprietor	45%	47%	43%	58%	30%
General Manager	31%	33%	36%	21%	35%
Maintenance/operations/housekeeping manager	6%	5%	9%	4%	7%
Building/ facility manager	6%	5%	4%	9%	5%
Purchasing manager	2%	1%	1%	3%	4%
Supervisor	1%	1%	1%	2%	1%
Manager/ office manager	1%	-	1%	-	4%
CFO	1%	1%	-	1%	2%
Other	7%	8%	5%	3%	12%

Respondents by Number of Employees and Decision-Making Role

	Total	Food Service	Hospitality/ Lodging	Commercial	Healthcare
Number of Employees Currently in Company					
1 - 10	39%	30%	40%	54%	31%
11 - 50	21%	34%	17%	18%	17%
51 - 100	10%	11%	10%	8%	11%
101 - 1,000	16%	9%	21%	13%	21%
1,001 - 10,000	8%	9%	7%	4%	13%
Over 10,000	6%	8%	5%	3%	8%
Person who Makes most of the Cleaning Product Decisions for Business					
Myself	59%	68%	50%	70%	48%
Another employee below me	14%	4%	16%	18%	17%
Another employee at my level	12%	12%	18%	6%	14%
Another employee above me	12%	11%	14%	6%	17%
Other	3%	5%	2%	1%	5%

Respondents by Number of Employees by Age, Region, and Gender

	Total	Food Service	Hospitality/ Lodging	Commercial	Healthcare
Age					
18-39	19%	24%	25%	10%	18%
40-49	21%	27%	17%	22%	20%
50-59	36%	32%	37%	34%	42%
60+	23%	18%	21%	33%	21%
Region					
Northeast	17%	18%	14%	17%	19%
South	32%	30%	39%	27%	31%
Midwest	21%	25%	15%	26%	19%
West	30%	28%	32%	30%	31%
Gender					
Male	50%	52%	52%	56%	37%
Female	50%	48%	48%	44%	63%

Contact Information

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