Ipsos Public Affairs
The Social Research and Corporate Reputation Specialists

P&G Professional™

Cleaning Industry Insights Survey

2014 Findings

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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.
- The 2014 study mirrors research conducted in 2011 and 2013, both in terms of the questions and methodologically, allowing for results that are fully trendable.

Methodology

- This study was conducted online, May 1-7, 2014.
- The sample consists of 401 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=101)
- 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

Executive Summary:
Business Outlook and Efficiencies

Overall, cleaning operations managers tend to have a similar outlook as in 2013:

- **Continued Cautious Optimism about the Economic Climate:**
  - Over three-quarters expect business within their sector to improve within the next twelve months, but just close to four in ten believe that the economic recession is now over.

- **Similar Perceptions of Pressure to Keep Operating Costs Down, Business' Effectiveness in Doing So, and Business' Efficiency:** There is virtually no change in 2014 in terms of respondents who report feeling pressure to keep operating costs down and the majority of respondents view their businesses as having been effective overall in keeping operating costs down over the past twelve months.
  - Notably, the 2014 respondents in the Healthcare sector no longer perceive there to be increased levels of pressure to keep operating costs down to the same extent as the respondents in this sector did in 2013.
  - Increasing efficiency continues to be viewed across all sectors as the preferred course of action to improve the bottom line, compared to either raising prices or some other measure.
  - Reducing waste is once again the most commonly reported way in which respondents feel their businesses have improved their efficiency over the last two years.

- **Similar Cutbacks in Most Areas:** Overall few changes emerge vs. 2013 in terms of cutbacks; however:
  - More cutbacks are being made in office supplies than they were in 2013, while there is a decrease in cutbacks in staff, such as laying off employees.

- Similar proportions of respondents in 2014 report that their businesses are adopting a "doing more with less" approach in various areas as in 2013.

- A considerable majority of respondents continue to view their cleaning operations as having been efficient in the last twelve months.

Executive Summary: **Business Focus and Concerns**

- **Keeping Customers Satisfied Remains a Top Priority:**
  - Keeping customers satisfied is considered to be a priority among cleaning operations managers than either growing the business or making a profit.
  - Customer dissatisfaction also remains one of the top causes of concern, both in terms of what causes respondents to worry about their business, and what causes them to worry about cleaning or disinfection as it relates to their business.

- **Causes of Worry about Business:** Roughly four in ten say reduction in business caused by economic downturn is among the top three causes of worry, followed by customer dissatisfaction, low staff morale and engagement, and competitors doing a better job.
  - However, in 2014 only one in six identify budgetary cuts as a cause for concern, down from one in five in 2013.
  - In contrast, roughly one in four are now concerned about competitors doing a better job, compared to one in six who were of this opinion in 2013.

- **Causes of Worry Regarding Cleaning or Disinfection:** Customer dissatisfaction or complaints also remain a top cause of worry in terms of cleaning or disinfection.

Executive Summary: **Cleaning Operations**

- **Overall Pride:** The majority of cleaning operations managers are extremely or very proud of their cleanliness, hygiene and cleaning procedures (although only about half in the Healthcare sector feel this way); however, challenges and concerns remain, with those identified in 2014 being generally similar to those identified in 2013:

- **Managing Staff:** The biggest challenges of managing a cleaning staff include quality of work, followed by lack of interest, motivation and dedication.
  - While still a top challenge, in 2014 fewer respondents deem lack of interest, motivation, or dedication as a challenge than in 2013.
  - Limited resources (such as cleaning products and/or staff) is now identified as a challenge by a greater proportion of respondents than in 2013.

- **Smooth Running of the Cleaning Department:** Almost four in ten consider staff effort and attitude as preventing the business's cleaning department from running as smoothly as possible.
  - However, one-quarter of the 2014 respondents say that there are no operational inefficiencies relating to their business's cleaning efforts, a proportion that is virtually identical to that of last.

- **Cleaning-Related Training:** Loss of work productivity emerges again as the main obstacle to effective cleaning-related training, followed by the cost of training, language differences, and the availability of qualified training leaders.

- **Cleaning Areas**: For most sectors, bathrooms continue to lead as the area whose cleanliness is viewed as being the most important to customers, as well as being the most difficult to clean.
  - The exception is in the Food Service sector, whose respondents deem the main traffic space as the most important to customers, and kitchens as the most difficult to clean.

- **Helpful Factors for Performing Cleaning Services:** Most 2014 respondents consider products that get the job done the first time as being among the top two elements that would be most helpful in performing cleaning services.

Executive Summary:
Cleaning Products

- **Product Performance is the Leading Factor in Purchasing Cleaning Products, but Price Gains Importance:** Product performance, efficacy, and ease-of-use remains the top-ranked factor in terms of their importance when purchasing cleaning products; however, nearly as many respondents now consider price to be the most important factor, compared to 2013.

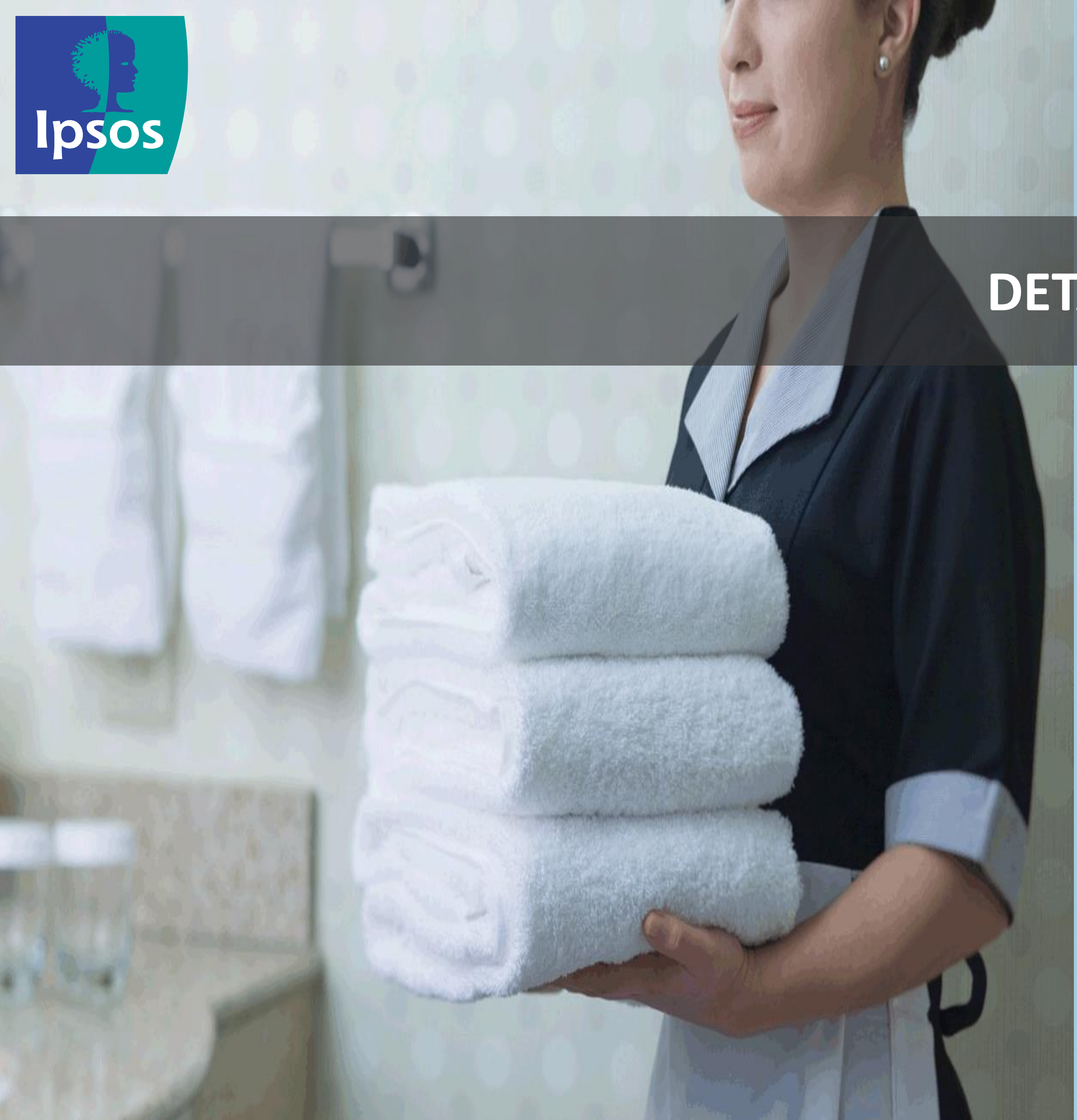
- **High Quality and Effectiveness Continue to Define "Value"**: Just as product performance remains the top-ranked factor, high quality and effectiveness of use were found to be the characteristic that many respondents feel best defines "value".

- **Importance of Feedback:** A considerable majority believe the opinions and feedback of cleaning personnel regarding the products being used to be important.

- **Laundry:** Several new questions about laundry products were asked among respondents in the Hospitality/Lodging sector:

  - A majority of respondents in this sector indicate that they would be much more likely to consider a new product that offers bottom line savings, while nearly as many would do so if it offered reduced linen replacement costs, followed by lower energy consumption.

  - About four in ten say that reducing laundry operating costs is *very* important when it comes to laundry care, and just under one in three indicated that they would be *very* willing to pay more for a product that might offer such savings by reducing other costs.

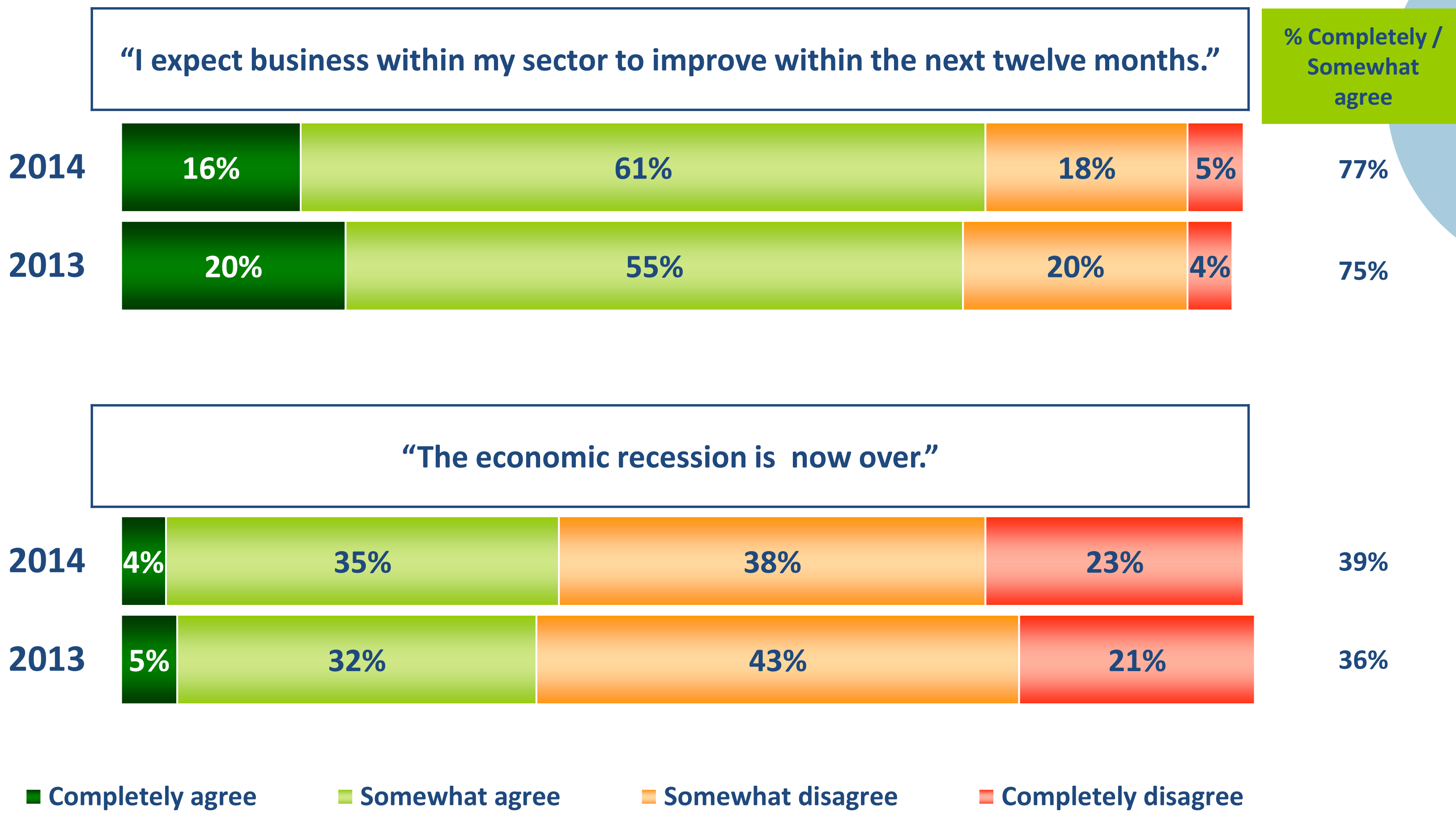


DETAILED FINDINGS

BUSINESS OUTLOOK AND EFFICIENCIES

Perceptions of Current Economic Climate

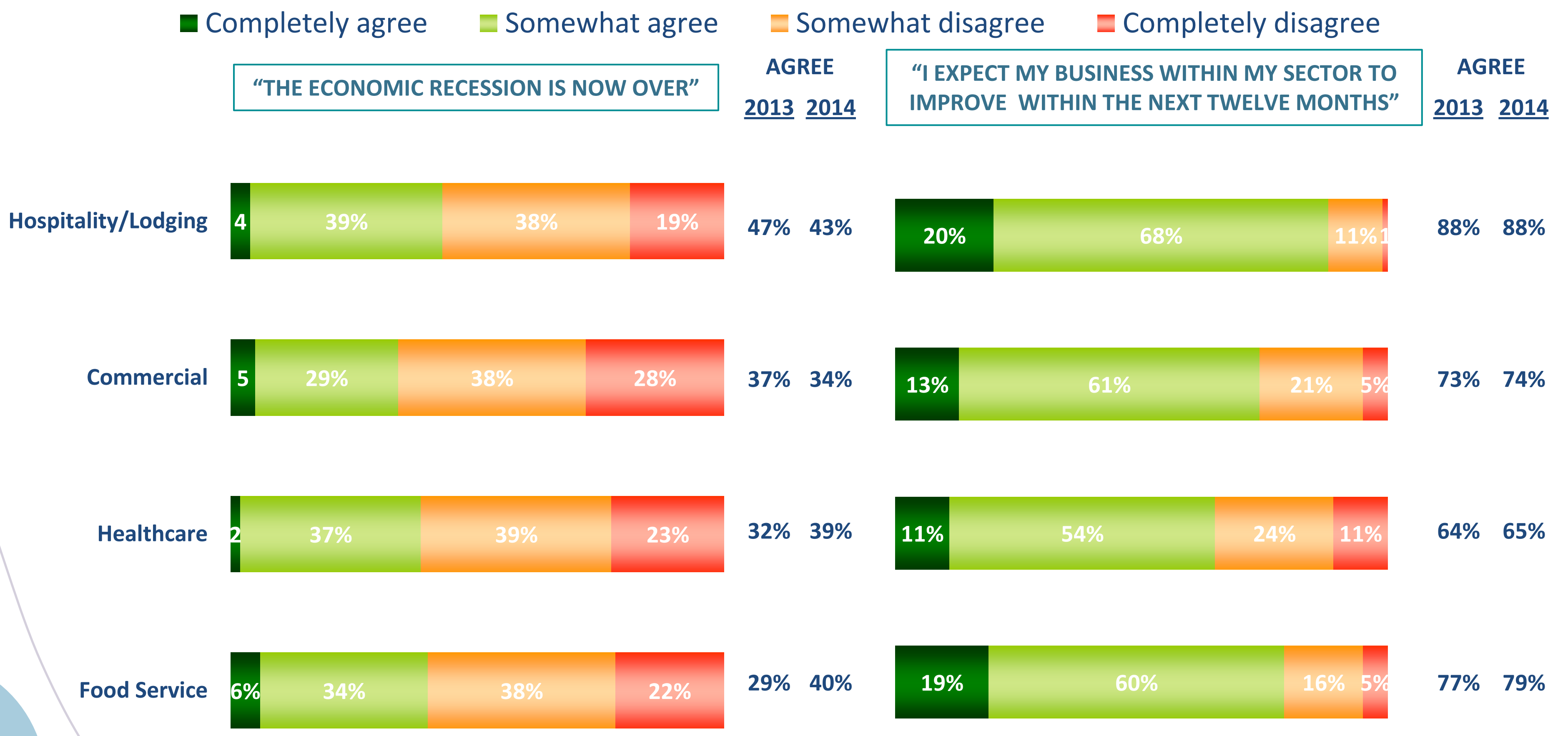
- No differences emerge compared to 2013; a minority of respondents feel that the recession is over, while three quarters expect business within their sector to improve within the next twelve months.



Q. To what extent do you agree or disagree with the following statements?
Base: All Respondents: 2014 (n=401); 2013 (n=408)

Perceptions of Current Economic Climate: Sector Comparisons

- In terms of differences across sectors, those in the Hospitality/Lodging sector tend to be the more optimistic about the economic climate than those in other sectors, as nearly nine in ten of those in the Hospitality/Lodging sectors expect business to improve within the next twelve months vs. two-thirds to three-quarters of those in other sectors.

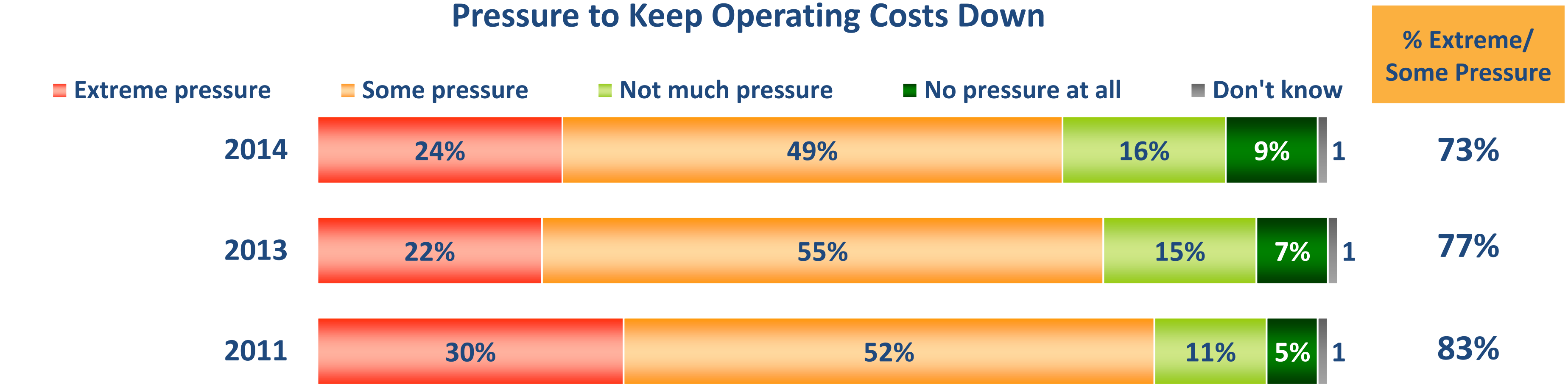


Q. To what extent do you agree or disagree with the following statements?
Base: All Respondents: 2014 (n=401); 2013 (n=408)

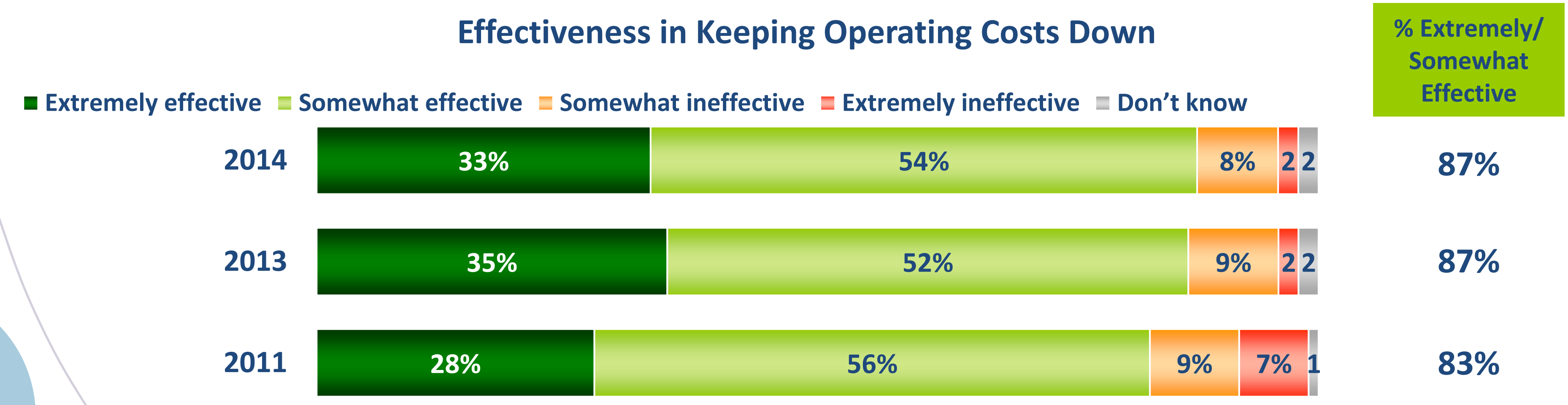
Effectiveness and Pressure in Keeping Operating Costs Down

- Respondents are very similar to those of 2013 in terms of the degree to which they feel under pressure to keep costs down, and in feeling that their businesses are effective in keeping costs down.

Pressure to Keep Operating Costs Down



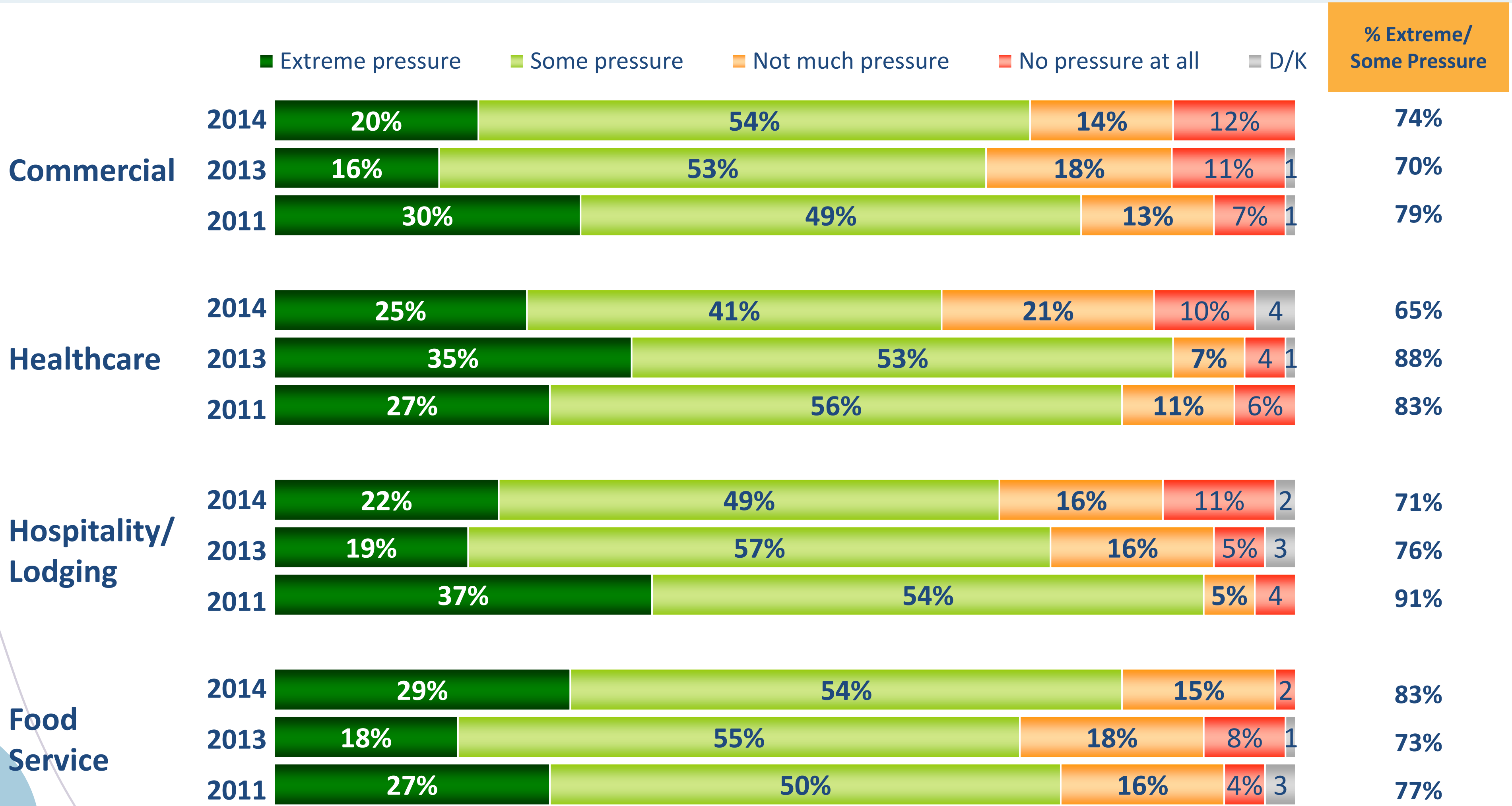
Effectiveness in Keeping Operating Costs Down



Q. Overall how effective or ineffective has your business been with regards to keeping its operating costs down in the past 12 months?
Q. How much pressure have you or the people you report to been under to keep operating costs down over the last 12 months?
Base: All Respondents Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Pressure to Keep Operating Costs Down

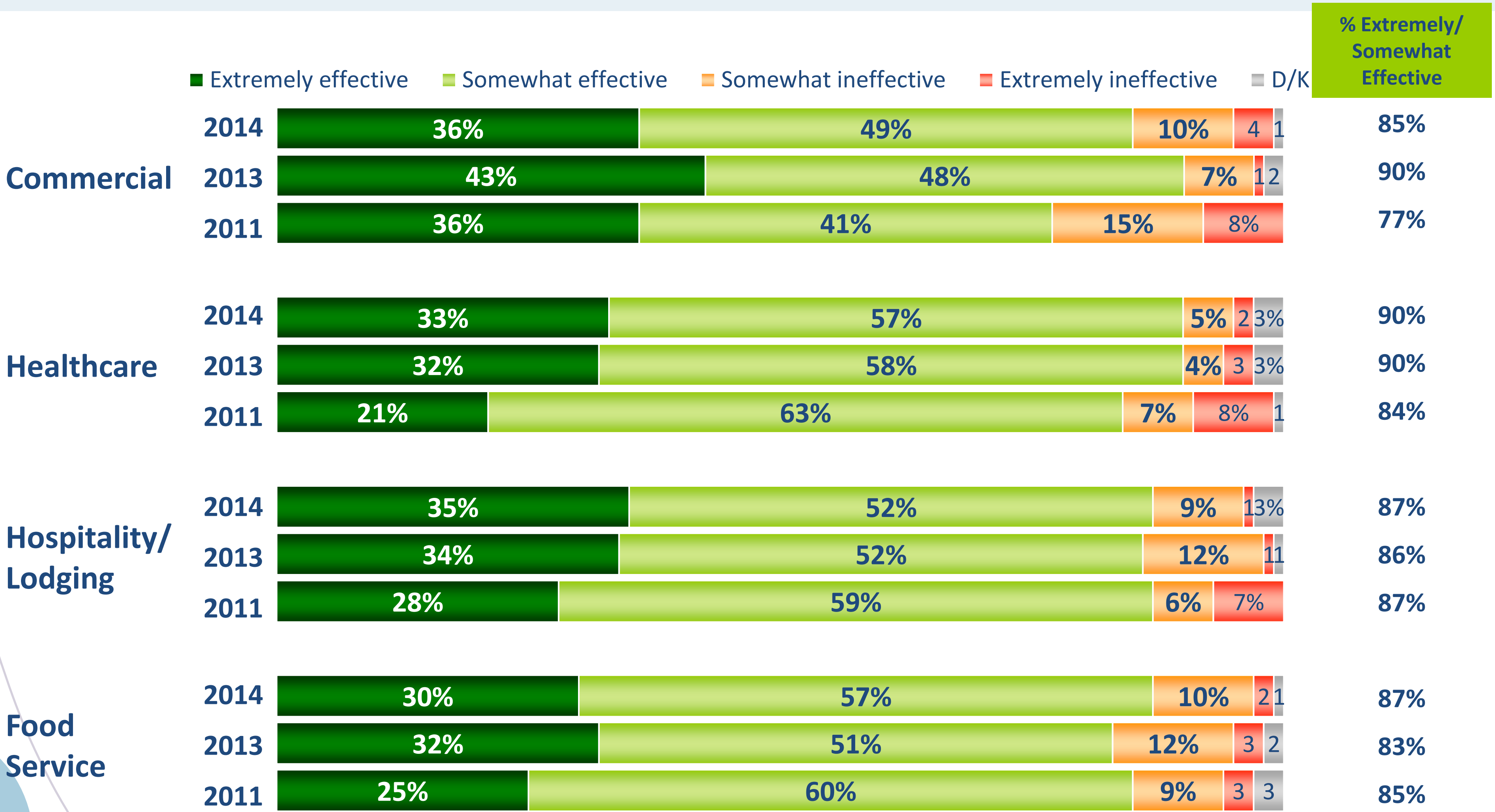
- In terms of pressure to keep costs down, those in the Healthcare sector are now much more similar to respondents in the other sectors, and feel less pressure than reported in 2013.



Q. How much pressure have you or the people you report to been under to keep operating costs down over the last 12 months?
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Effectiveness in Keeping Operating Costs Down

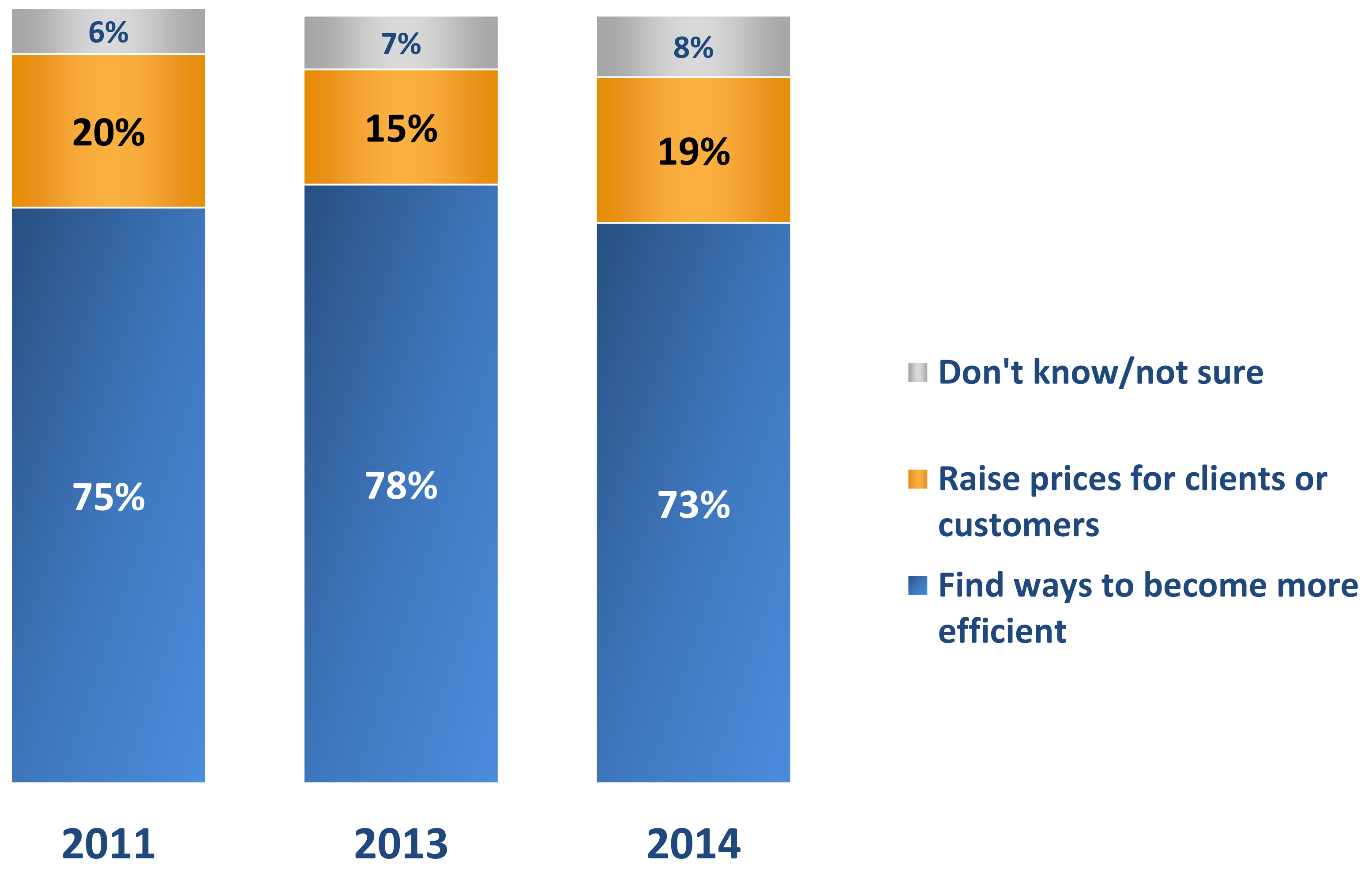
- Respondents in the all sectors are similar to those of 2013 in their views of their businesses as having been effective in the last twelve months.



Q. 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: 2014 (n=401); 2013 (n=408); 2011 (n=400)

Preferred Course of Action to Improve the Bottom Line

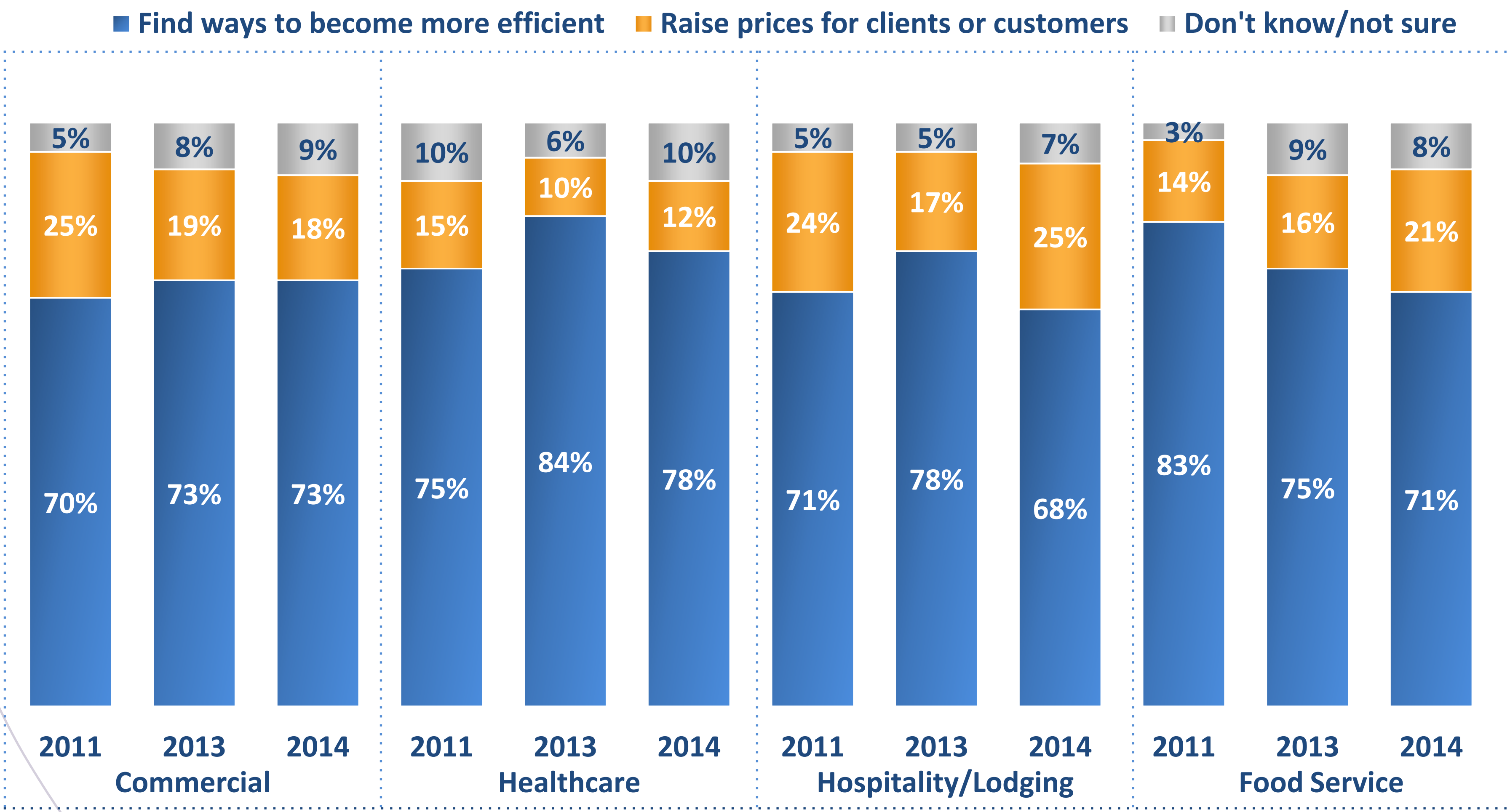
- Cleaning managers in most sectors tend to have similar views in 2014 as in 2013, in terms of what they view as priorities to improve their Bottom Line: **Find ways to become more efficient**.



Q. Which of the following actions would be preferable for your business to take in order to improve its bottom line?
Base: All Respondents 2011 (n=400); 2013 (n=408); 2014 (n=401)

Tracking Results by Sector: Preferred Course of Action to Improve the Bottom Line

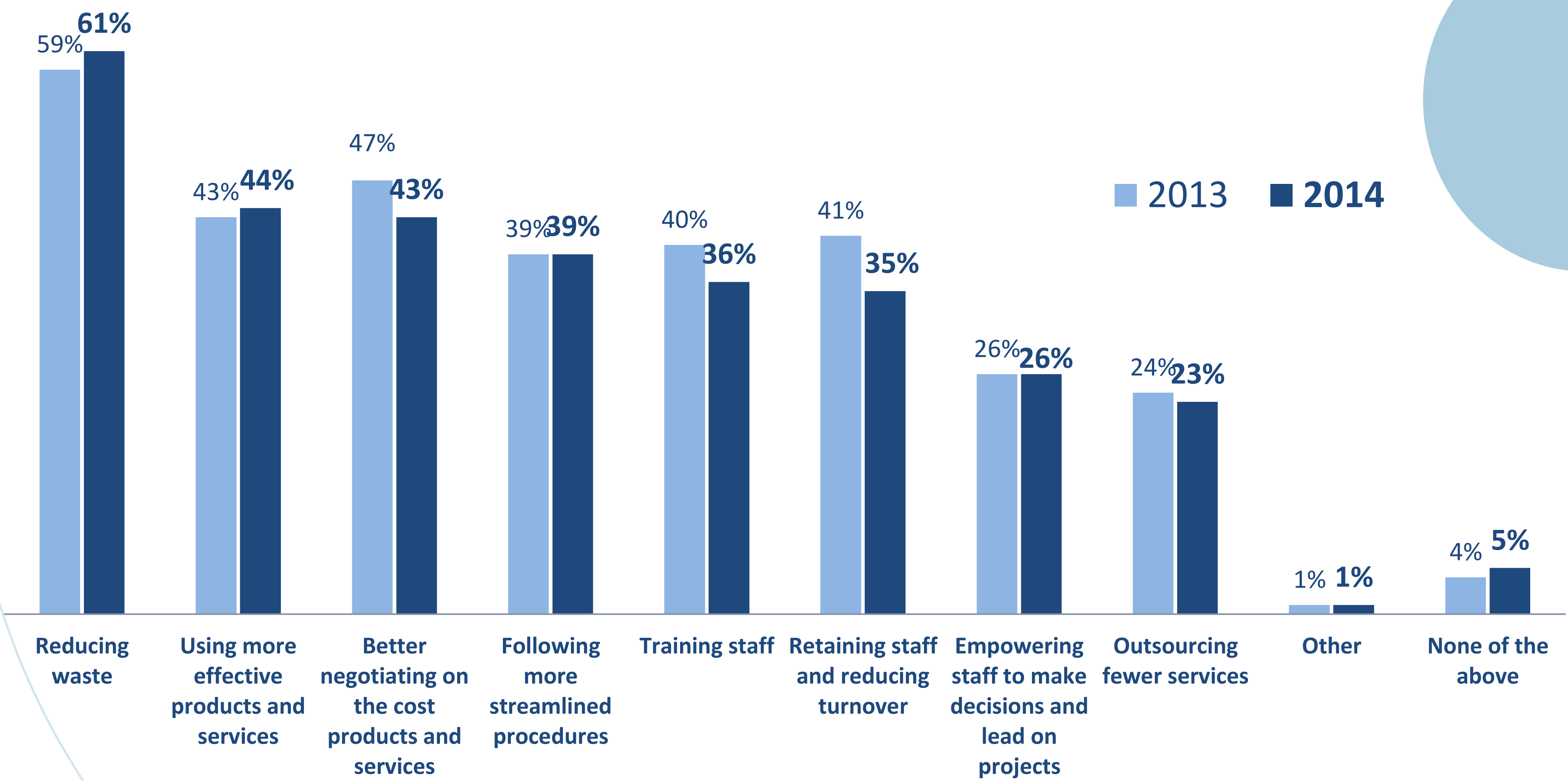
- No differences emerge across sectors in terms of the preferred course of action to improve the bottom line over time: Become more efficient:
  - However, for those in the hospitality/lodging and food service industries, the proportion of those who would prefer to increase prices went up vs. 2013.



Q. Which of the following actions would be preferable for your business to take in order to improve its bottom line?
Base: All Respondents 2011 (n=400); 2013 (n=408); 2014 (n=401)

Areas of Increased Efficiency

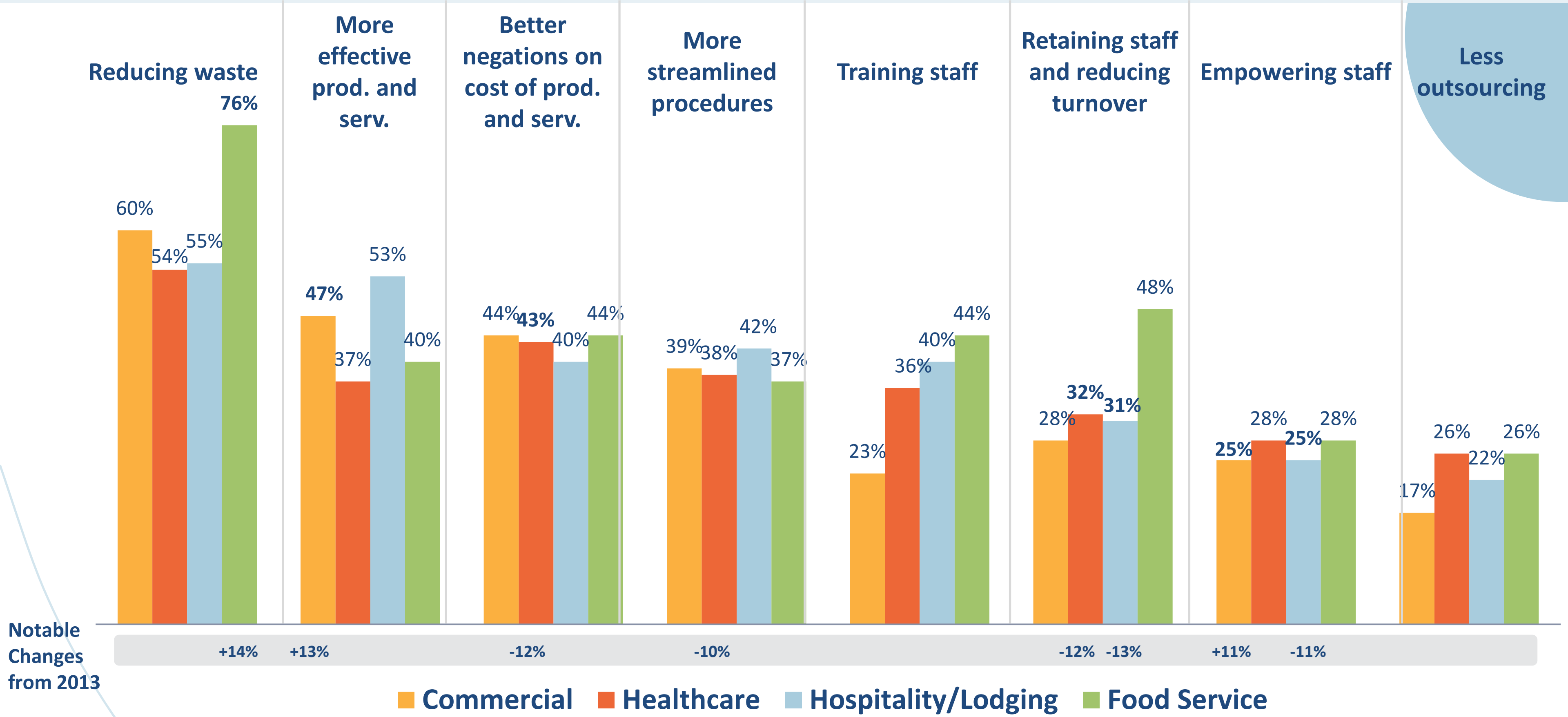
- Reducing waste, using more effective products, and better negotiating remain the most common ways in which respondents feel their businesses have become more efficient over the last two years.



Q. 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: 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: Areas of Increased Efficiency

- Several differences emerge across sectors with respect to the ways in which efficiency is perceived to have increased over the last two years. Those in Food Service are much more likely than those in other sectors to say reducing waste and retaining staff are areas of increased efficiency.
- By contrast, the Commercial sector is considerably less likely than either the Food Service or Hospitality sectors to find that training staff is an area in which their business has become more efficient.
- Although there are few differences within sectors vs. 2013, a significantly greater proportion of respondents in the Food Service sector now report reducing waste is a way in which they have become more efficient. Those from the Commercial sector are now more likely to say using more effective products and services and empowering staff are ways in which they've increased efficiency vs. 2013.

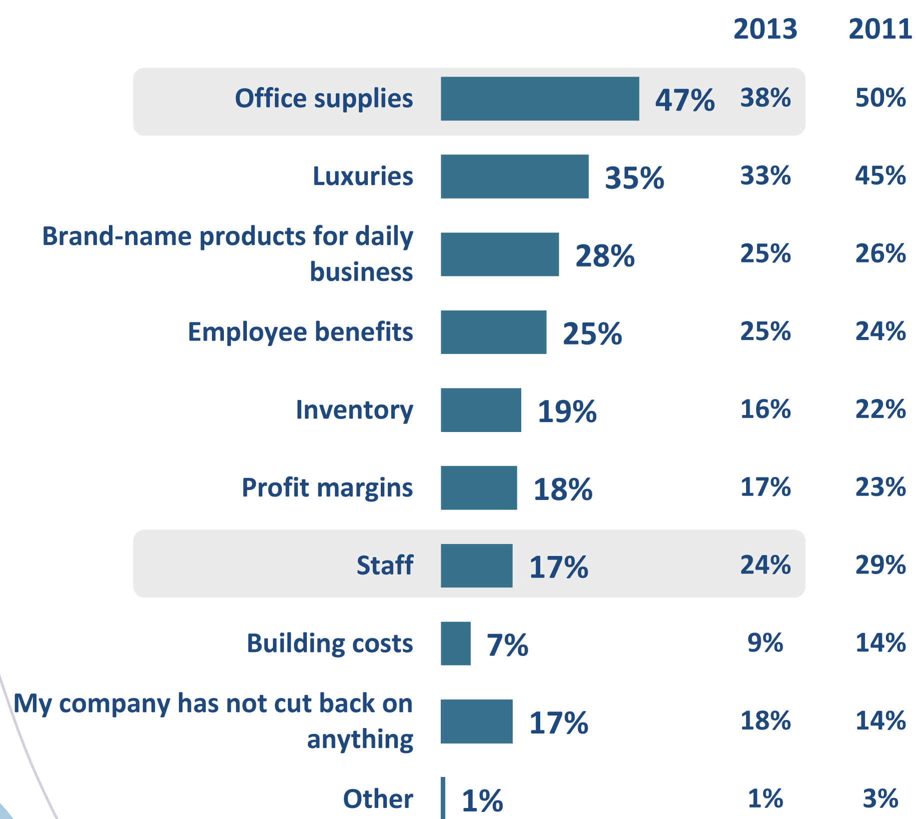


Q. Thinking about your business over the last 2 years, in which of the following ways, if any, do you feel it has become more efficient? (Please select all that apply)
Base: All Respondents: 2014 (n=401); 2013 (n=408)

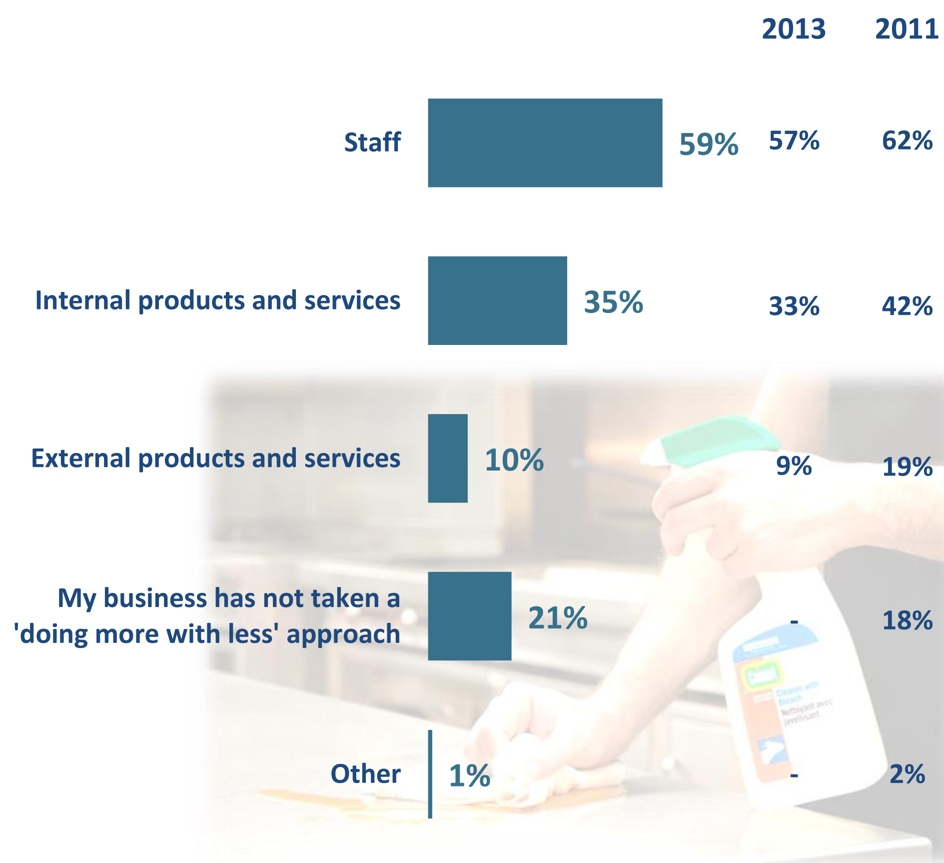
Cutbacks and “Doing More with Less” due to Economic Climate

- While respondents tend to be cutting back in the same areas that they did in 2013, a greater proportion now say that they are cutting back on office supplies, while fewer say that they are reducing staff. At the same time, six in ten say that they are “doing more with less” when it comes to their staff, though this mirrors findings from past years.

Areas of Cutbacks 2014



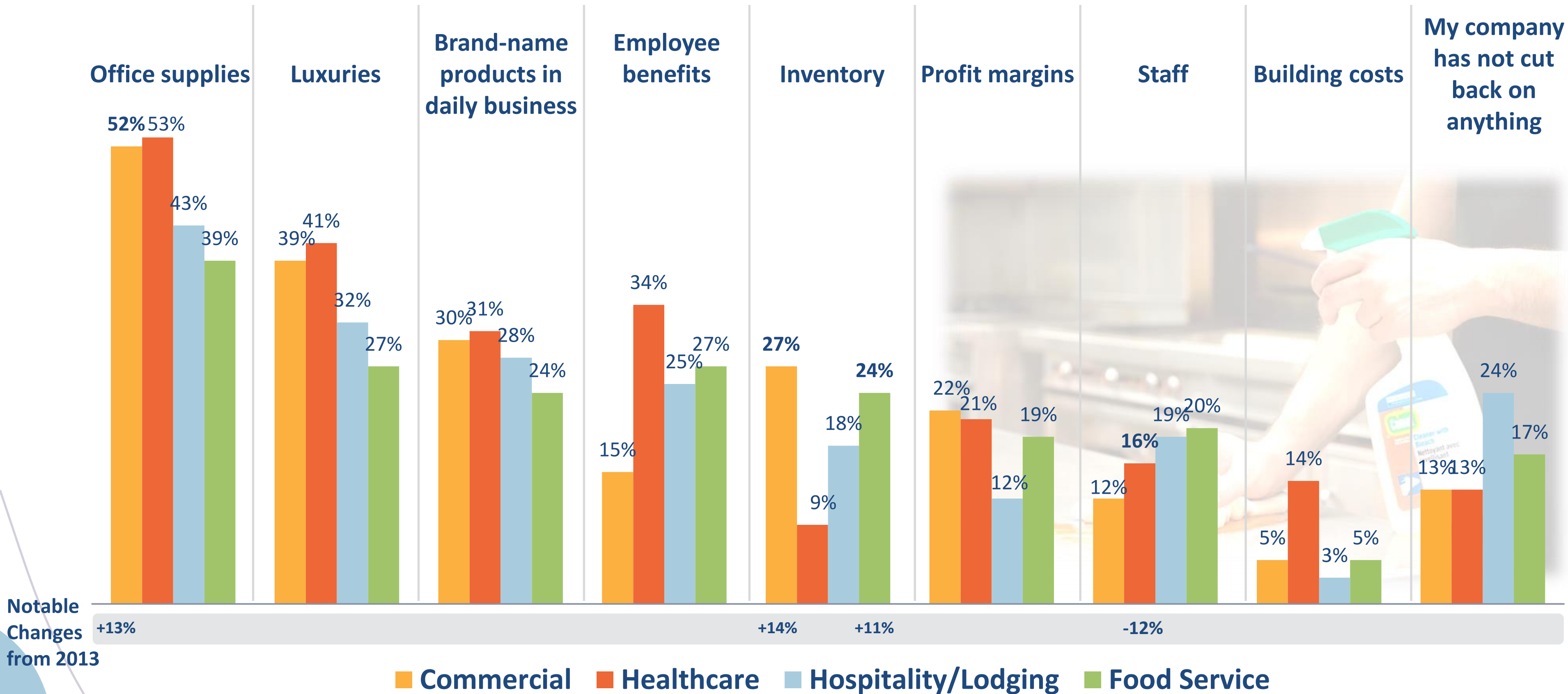
Areas of Doing More with Less 2014



Q. Which of the following has your business cut back on due to the current economic climate? Please choose all that apply.
Q. 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: 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Cutbacks due to Economic Climate

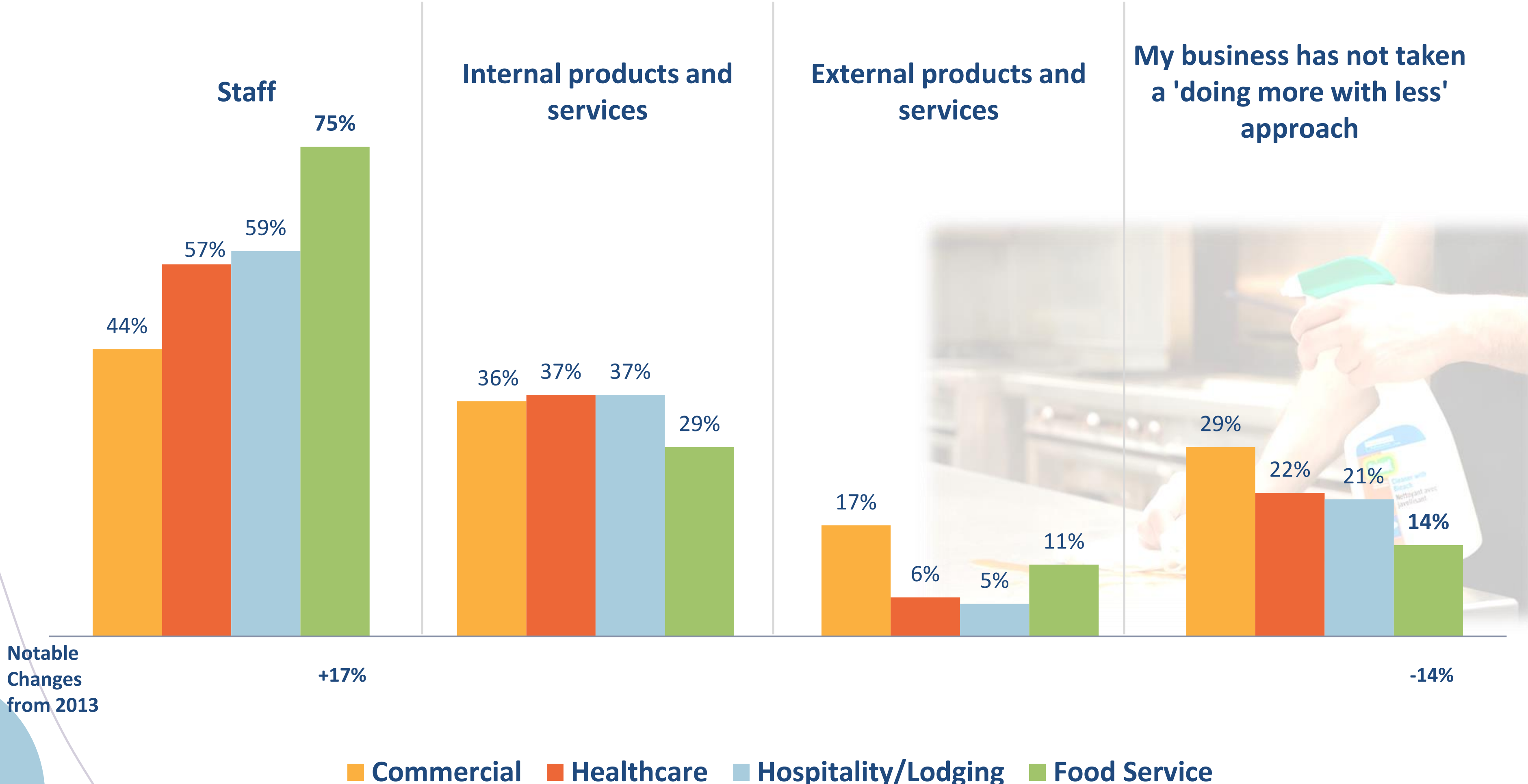
- Across sectors, but particularly in the Commercial and Healthcare sectors, top areas for cutbacks include office supplies and luxuries.
- In the Healthcare sector, cutbacks on employee benefits and buildings costs are also more prevalent than in other sectors.
- In contrast, those in the Hospitality/Lodging sector being more likely to have not cut back on anything.



Q. Which of the following has your business cut back on due to the current economic climate? Please choose all that apply.
Base: All Respondents: 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: "Doing More with Less" due to Economic Climate

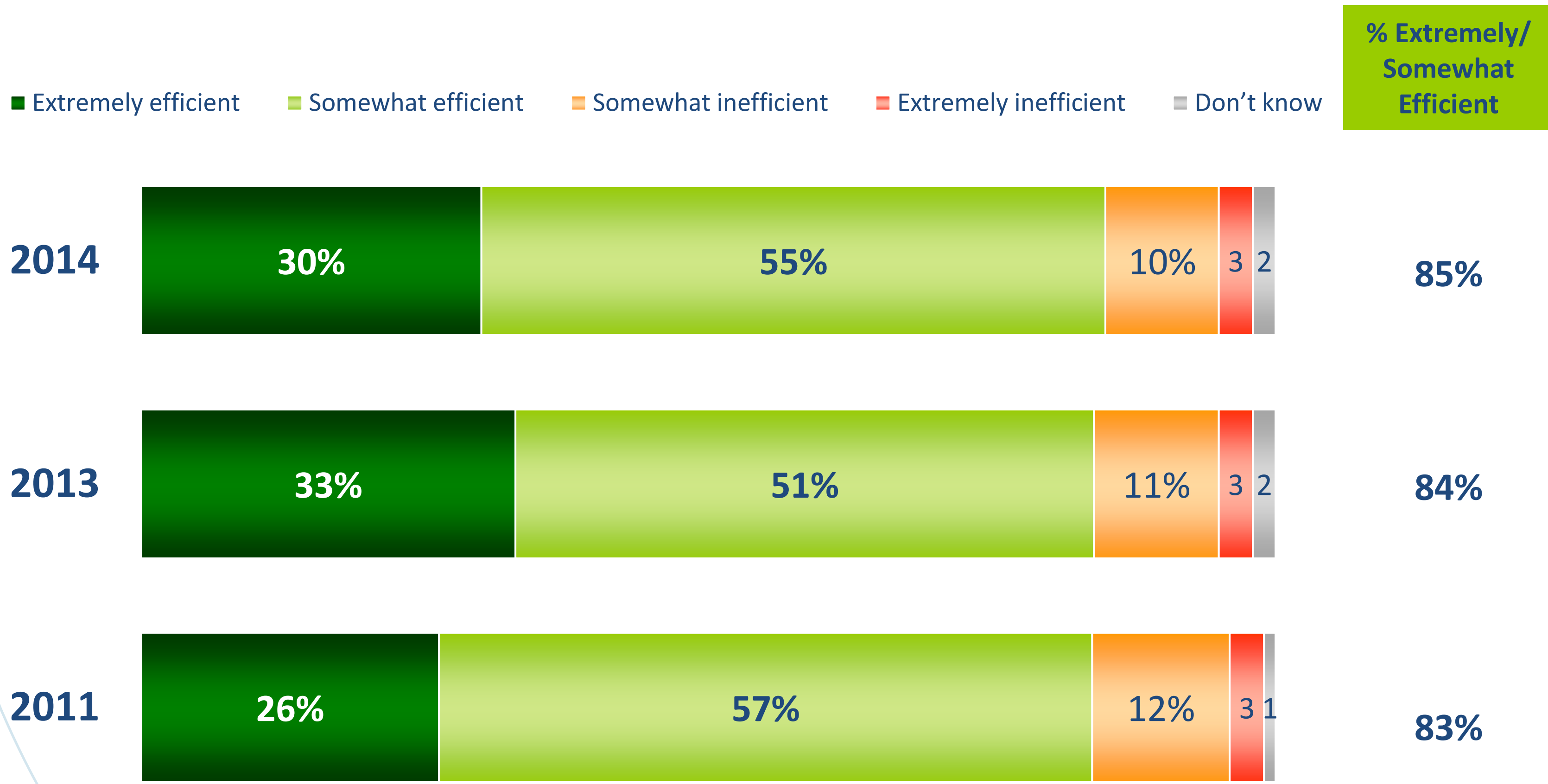
- Three quarters in the Food Service sector report that they are "doing more with less" staff, a significant increase vs. 2013. Though most common in Food Service, staff is the area where respondents across sectors are most likely to say they are "doing more with less."



Q. 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: 2014 (n=401); 2013 (n=408)

Efficiency in Cleaning Operations

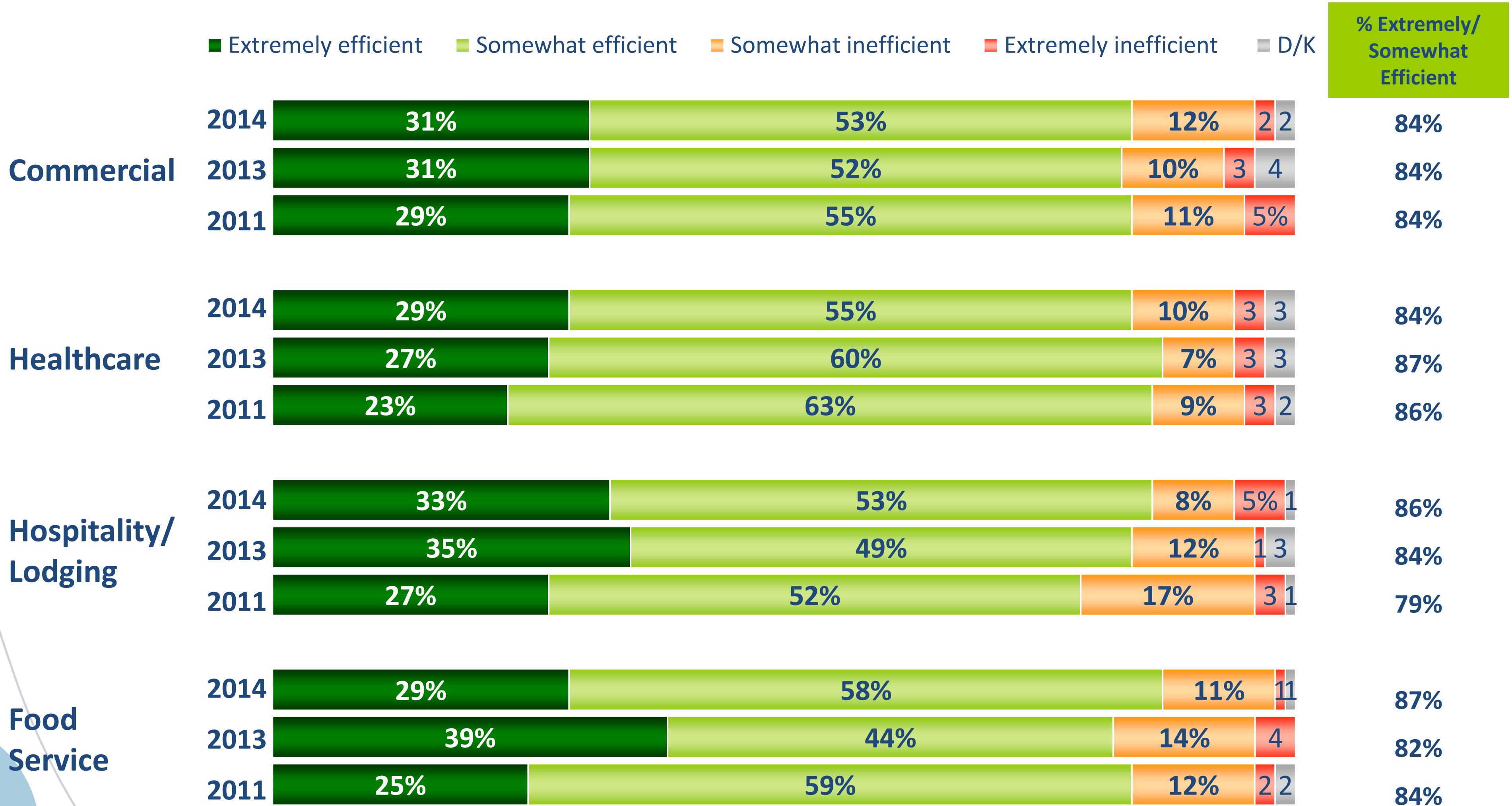
- Respondents continue to view their businesses as having been efficient in terms of cleaning operations over the last twelve months.



Q. Thinking exclusively about cleaning operations, how efficient or inefficient has your business been in the last 12 months?
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Efficiency in Cleaning Operations

- Few differences emerge across sectors in terms of their perceptions of their business as having been efficient in terms of cleaning operations.

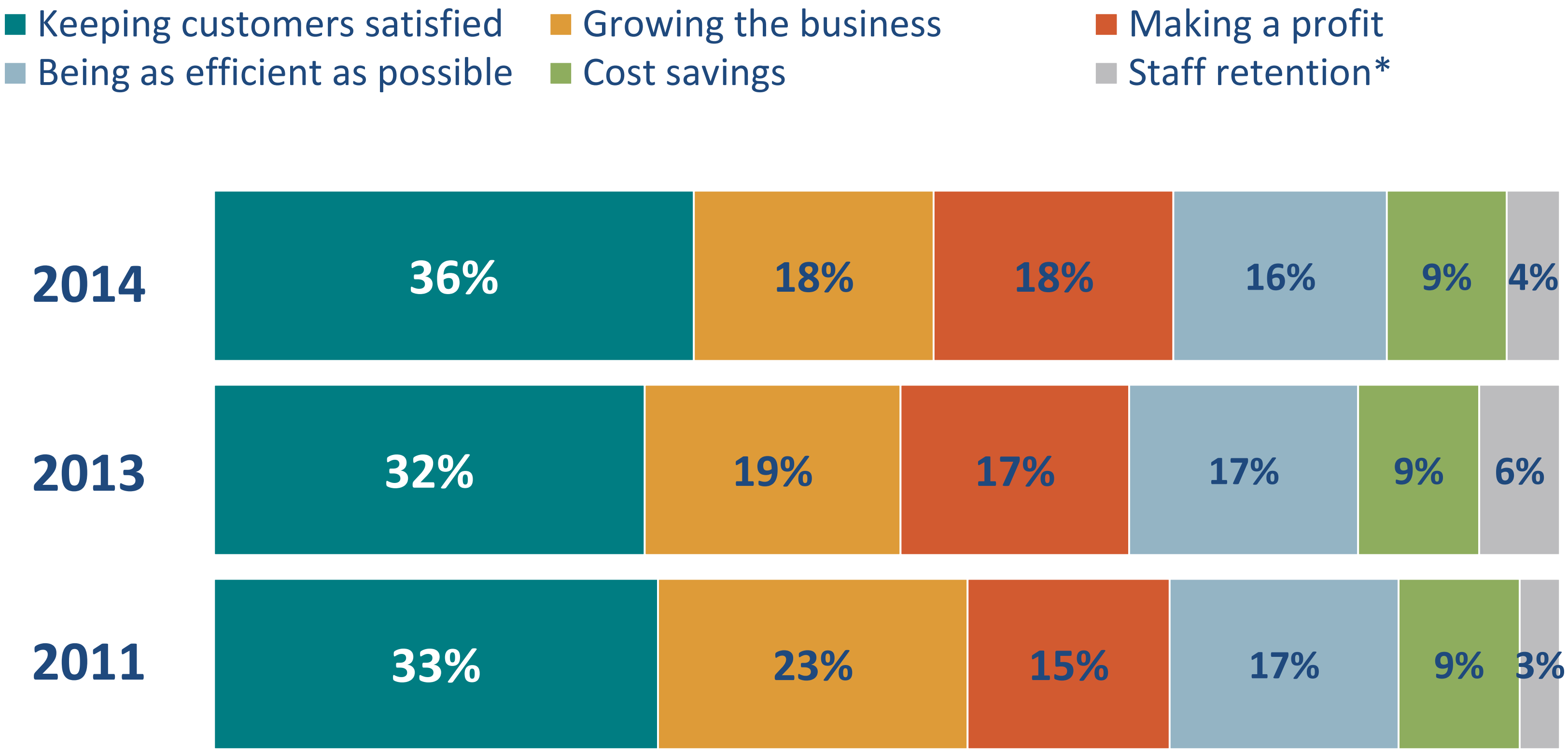


Q. Thinking exclusively about cleaning operations, how efficient or inefficient has your business been in the last 12 months?
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

BUSINESS FOCUS AND CONCERNS

Preferred Areas of Focus

- "Keeping customers satisfied" remains at the top business priority.
- Other important areas to the business by about one in five respondents each relate to increasing revenue, specifically making a profit and growing the business.

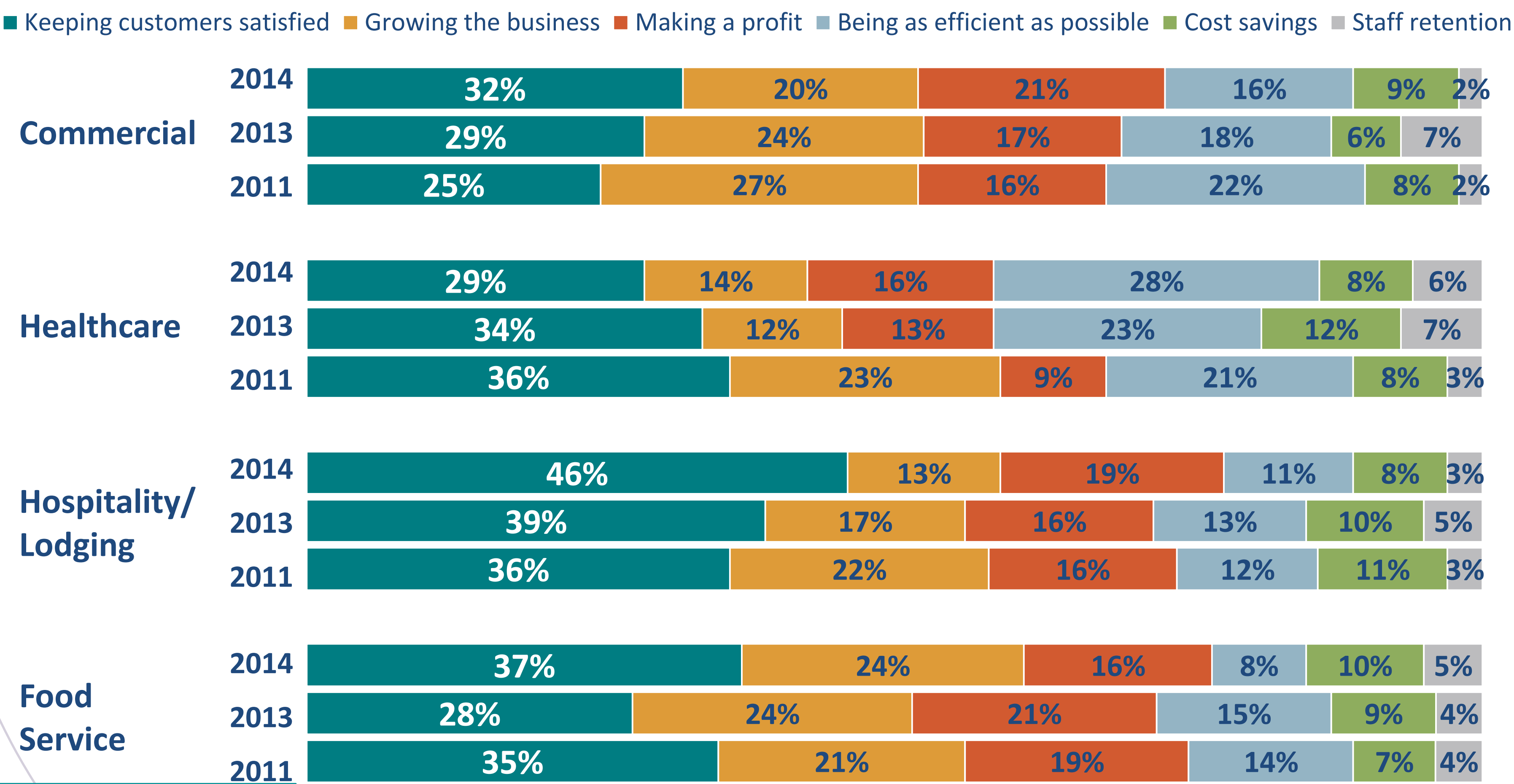


* *Note: 2011 question wording: Keeping all staff members employed*

Q. Which of the following do you feel is most important to your business right now? (Select one)
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Preferred Areas of Focus

- In terms of business priorities, “keeping customers satisfied” remains at the top, and in 2014 is particularly so among those in the Hospitality/Lodging sector.
- Those in the Healthcare sector are particularly likely to ascribe considerable importance to being as efficient as possible with current resources, compared to respondents in all other sectors.



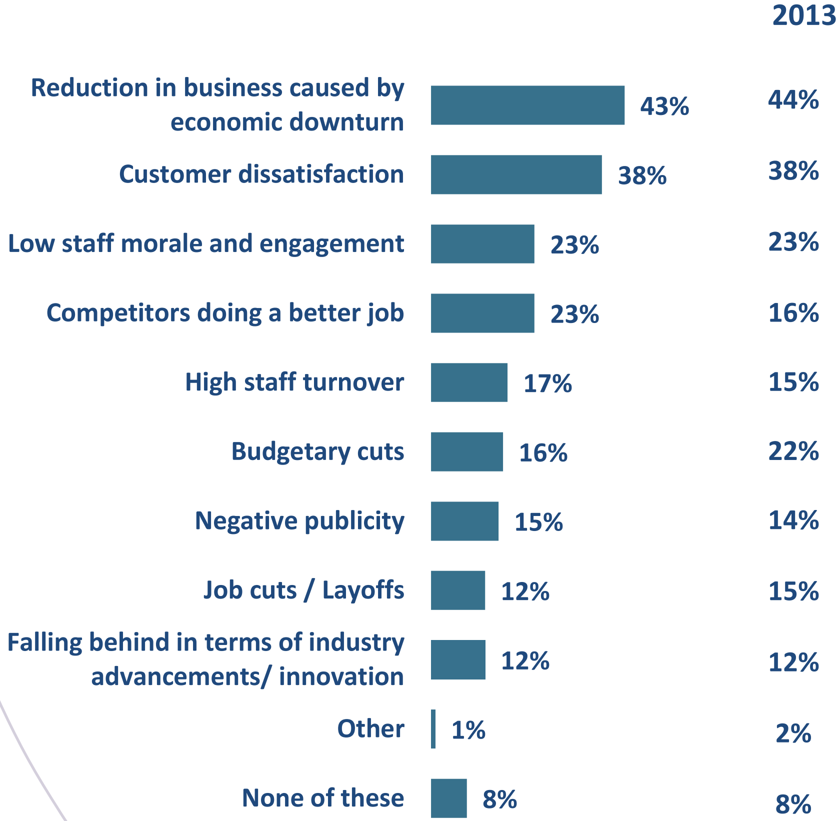
** Note: 2011 question wording: Keeping all staff members employed*

Q. Which of the following do you feel is most important to your business right now? (Select one)
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

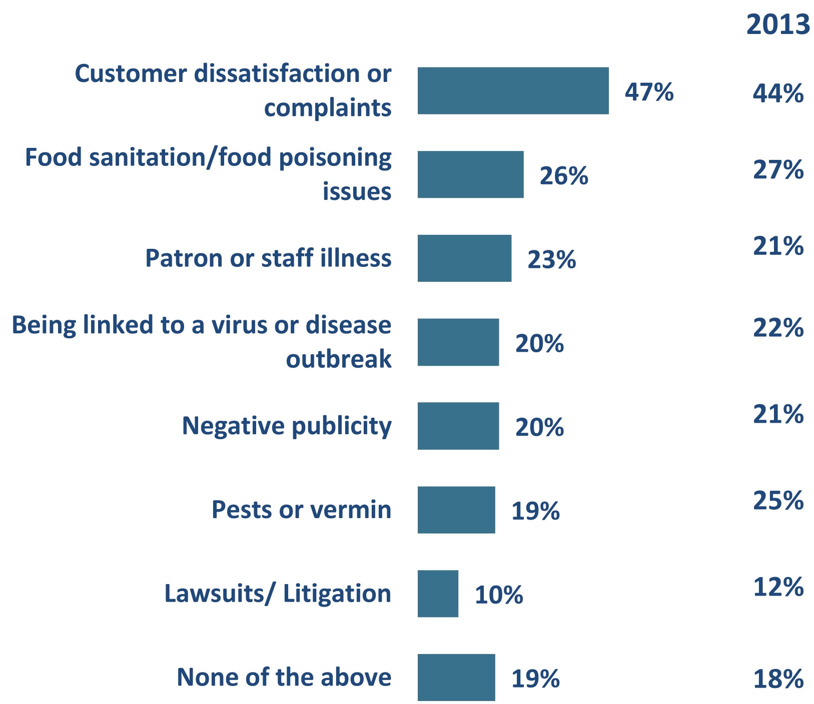
Concerns about Business and about Cleaning as it Relates to Business

- As in 2013, over four in ten identify a “reduction in business caused by economic downturn” as one of the top three causes of worry when thinking about their business in general. However, a smaller proportion than in 2013 are now concerned about budgetary cuts, while a greater proportion are concerned about competitors doing a better job.
- In terms of specific concerns about cleaning or disinfection as it relates to one’s business, customer dissatisfaction or complaints continue to be most important. However, a smaller proportion of respondents now worry about pests or vermin, compared to those who did in 2013.

Concerns about one’s business in general, 2014



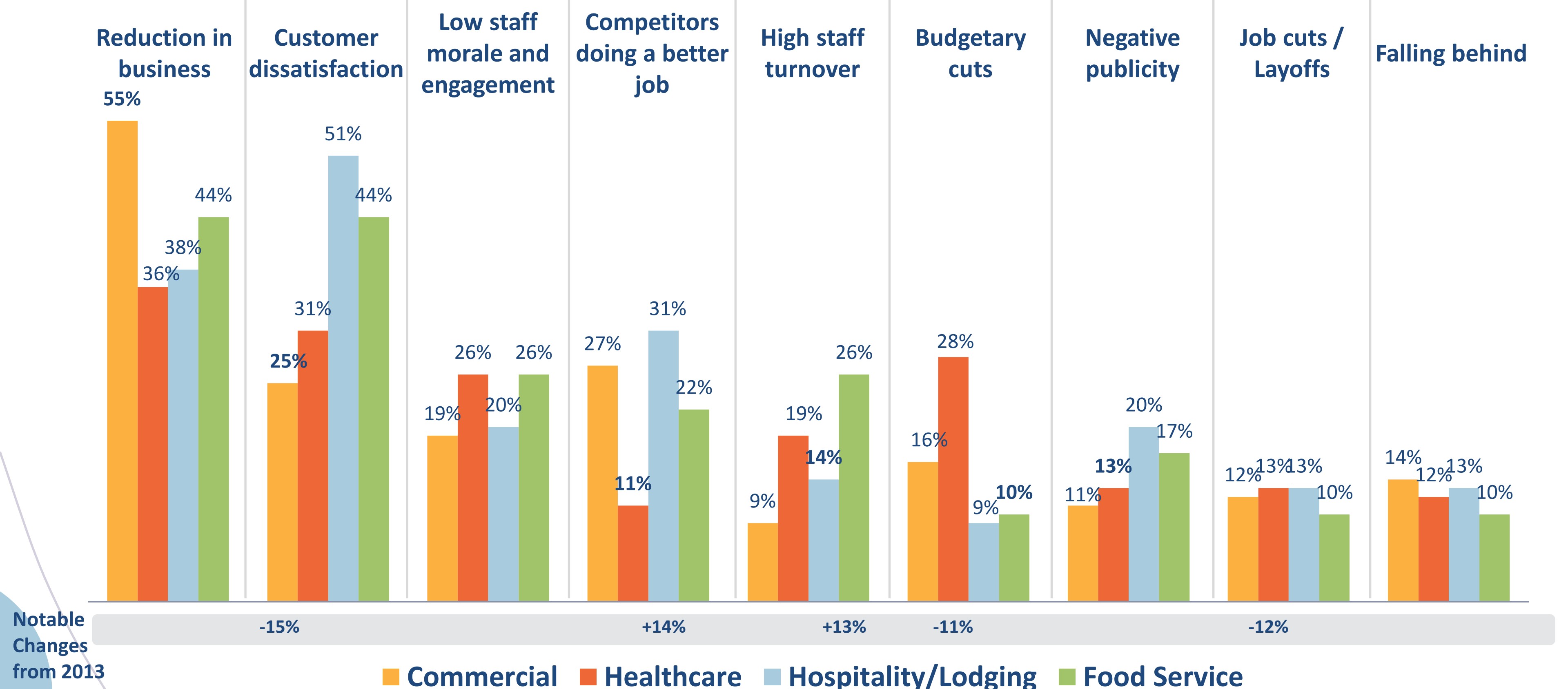
Concerns about cleaning or disinfection as it relates to one’s business, 2014



Q. Thinking about your business in general, which of the following, if any, causes you to worry? (Please select up to three)
Q. 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: 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: Concerns about Business

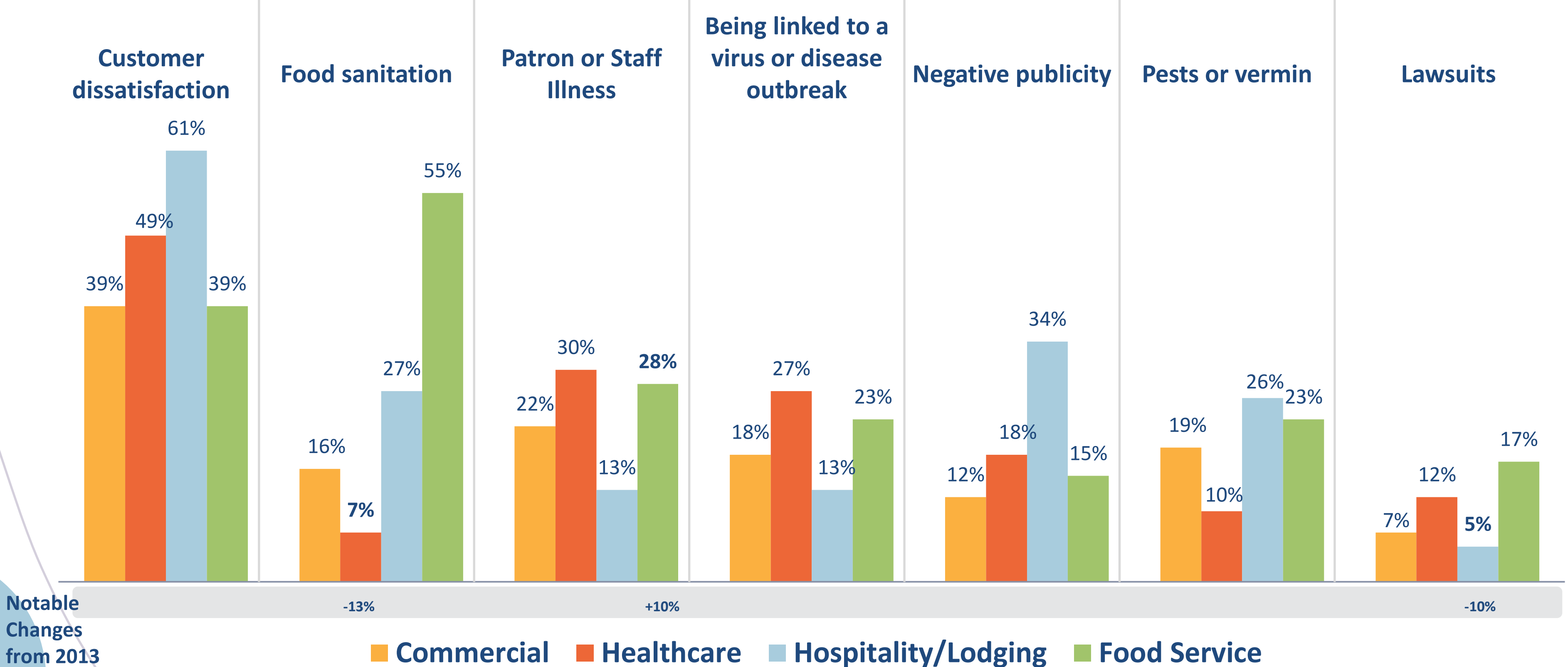
- Those in the Healthcare sector are particularly likely to say that they are concerned about budgetary cuts, and are least likely to worry about competitors doing a better job, compared to respondents in all other sectors.
- Cleaning managers in the Commercial sector tend to be less concerned about staff turnover than either the Food Service or Healthcare sectors, and more concerned about a reduction in business.
- Customer dissatisfaction also tends to be more of a concern among those in the Food Service and Hospitality/Lodging sectors.



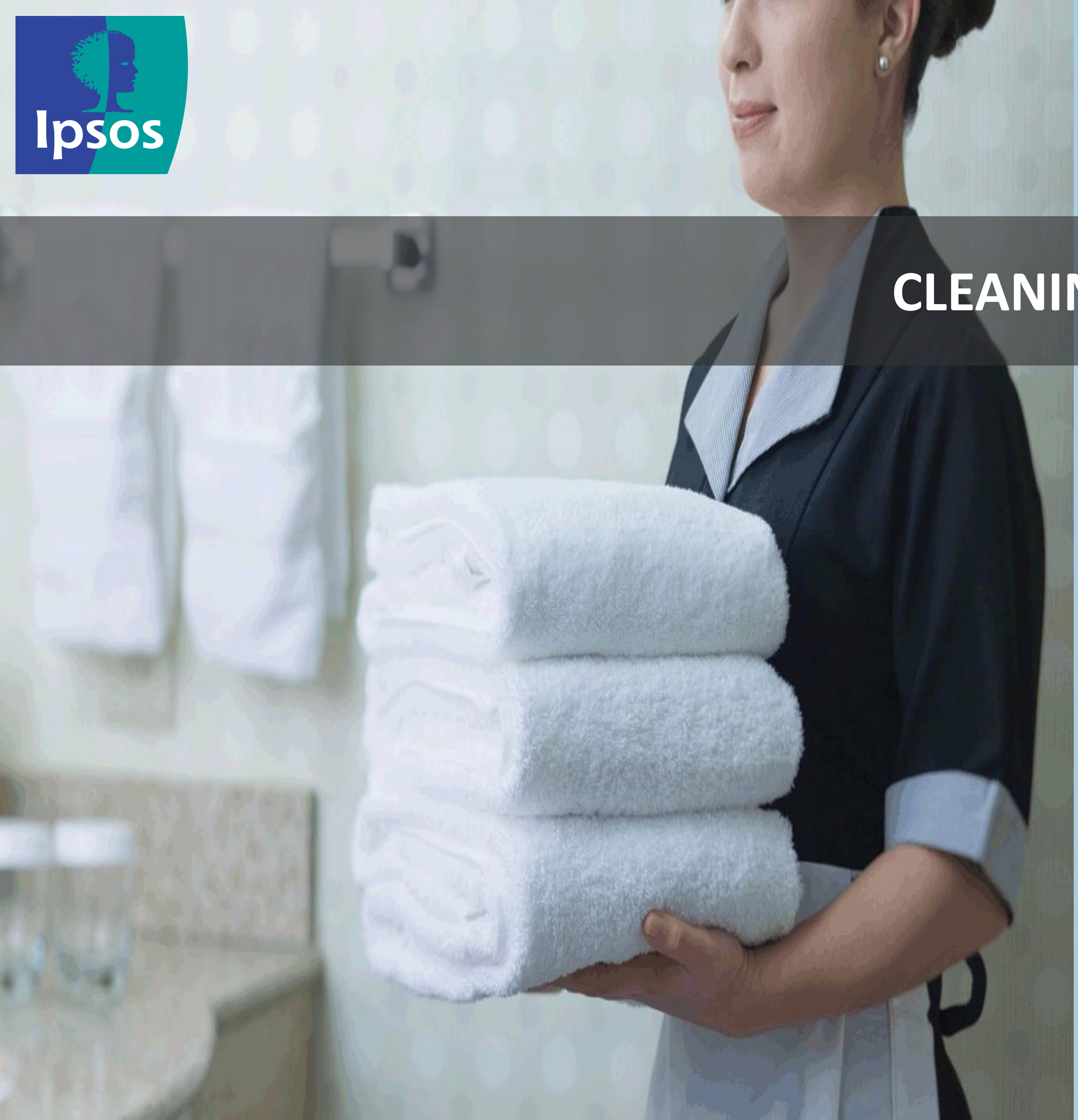
Q. Thinking about your business in general, which of the following, if any, causes you to worry? (Please select up to three)
Base: All Respondents: 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: Concerns about Cleaning as it Relates to Business

- Several notable differences emerge across sectors in terms of concerns about cleaning as it relates to business:
  - Those in the Hospitality/Lodging sector are particularly likely to be concerned about negative publicity compared to all other sectors, as well as to be concerned about customer dissatisfaction or complaints compared to all but the Healthcare sector.
  - Respondents in the Food Service and Hospitality or Lodging sectors are also more likely to be concerned about pests and vermin than those in the Healthcare sector.
  - As expected, food sanitation and food poisoning issues are much more likely to be of concern to those in the Food Service sector, and least so to those in the Healthcare sector.



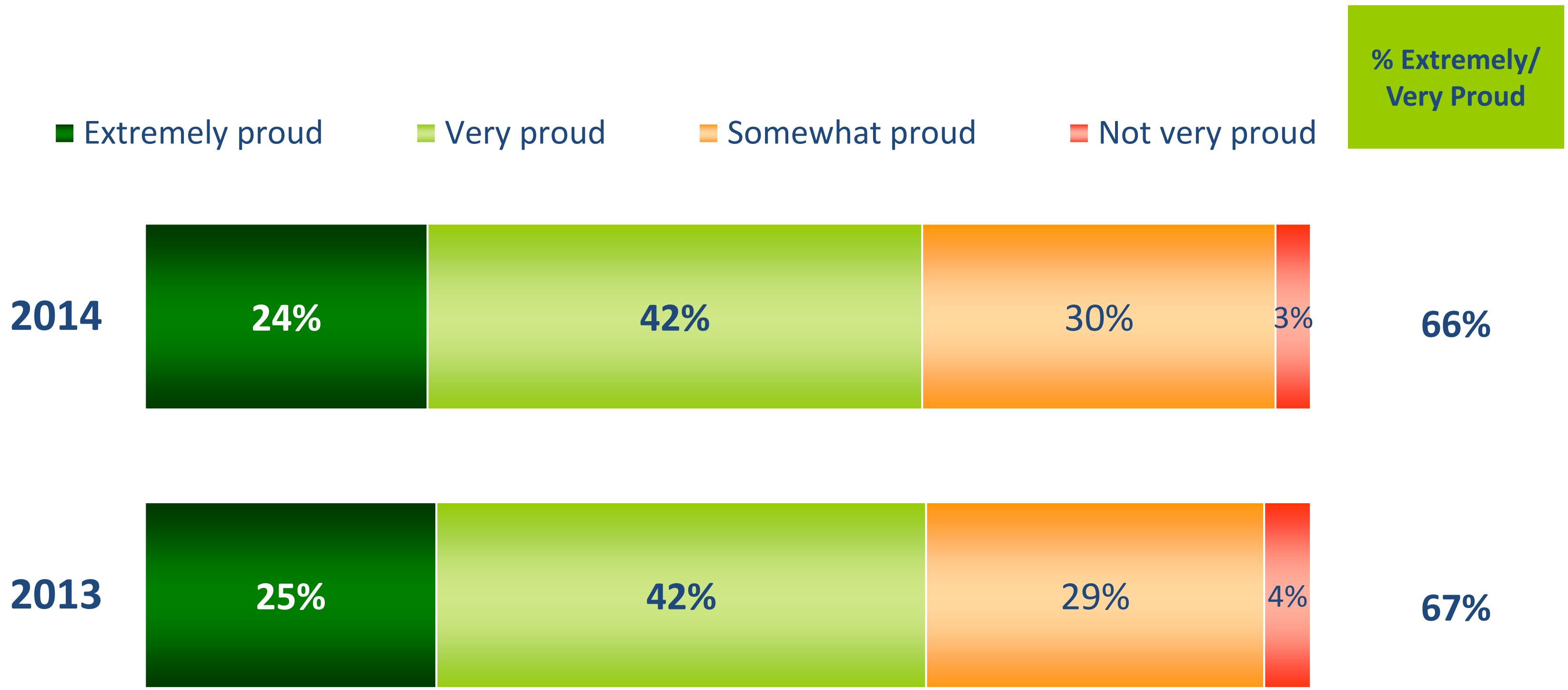
Q. Please think specifically about cleaning or disinfection as it relates to your business. Which of the following, if any, causes you to worry? (Please select up to three)
Base: All Respondents: 2014 (n=401); 2013 (n=408)



CLEANING OPERATIONS

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

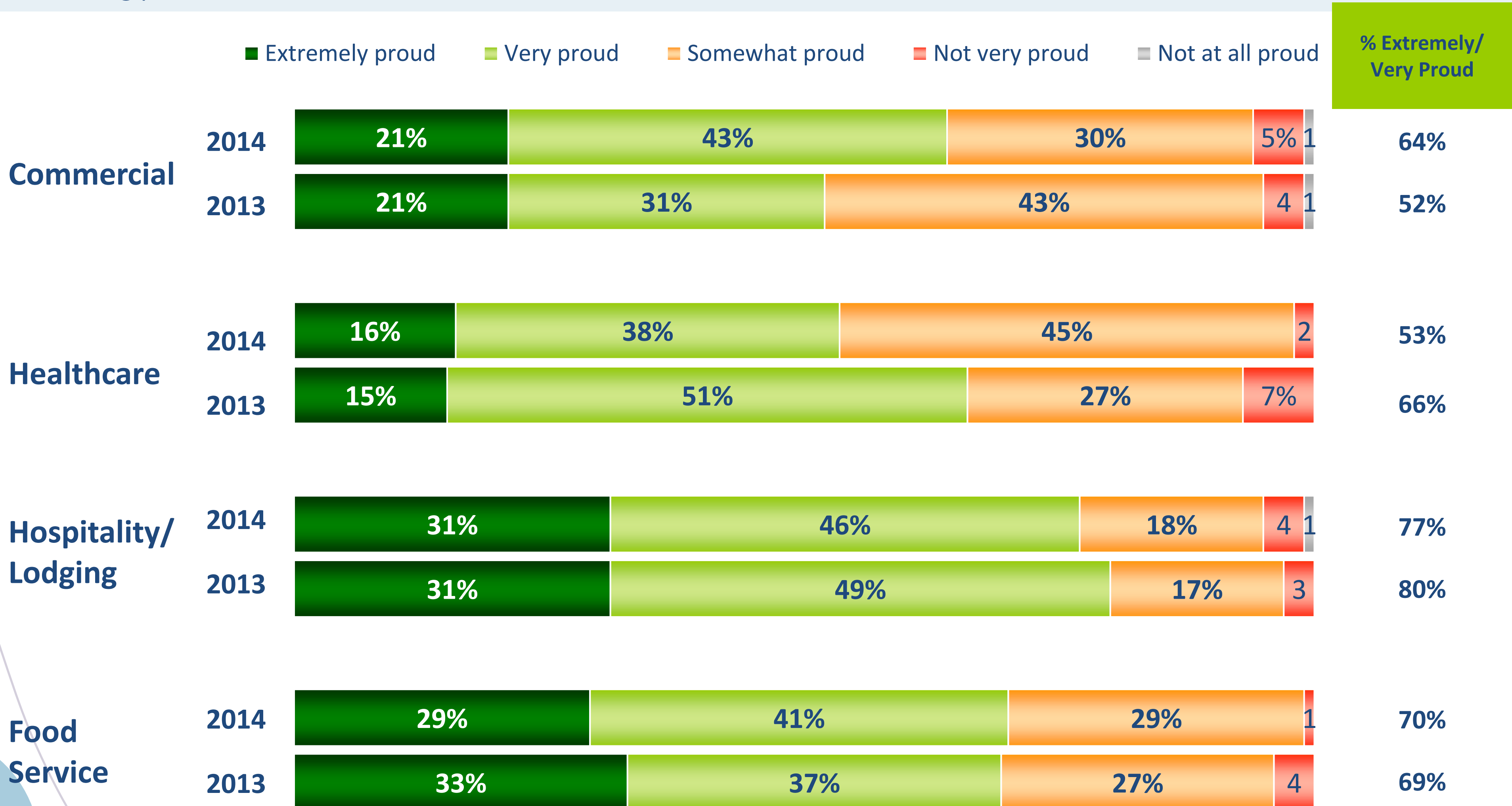
- Overall, cleaning managers are as proud of their business's cleanliness, hygiene and cleaning procedures as they were in 2013.



Q. Overall, how proud are you of your business's cleanliness, hygiene and cleaning procedures?
Base: All Respondents: 2014 (n=401); 2013 (n=408)

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

- Those in the Hospitality/Lodging sector are particularly likely to be proud about their business's cleanliness, hygiene and cleaning procedures, while those in the Healthcare sector are somewhat less so.



Q. Overall, how proud are you of your business's cleanliness, hygiene and cleaning procedures?
Base: All Respondents: 2014 (n=401); 2013 (n=408)

Challenges to Managing a Cleaning Staff and Obstacles to Smooth Running

- As in 2013, quality of work and lack of interest are the top challenges when it comes to managing a cleaning staff, though fewer now select lack of motivation compared with last year.
- Perceptions of the top obstacles preventing them from running their business' cleaning departments smoothly also mirror those of 2013, with staff effort being the most commonly mentioned.

Challenges in managing a cleaning staff, 2014

	2014	2013	2011
Quality of work	55%	60%	60%
Lack of interest/ motivation/ dedication	45%	53%	54%
Employee turnover	34%	36%	36%
Training	29%	30%	25%
Limited resources (i.e., cleaning products and/or staff)	20%	15%	21%
Language differences	18%	22%	25%
Other	1%	1%	2%
None of the above	10%	7%	8%
Don't know/not sure	8%	7%	5%

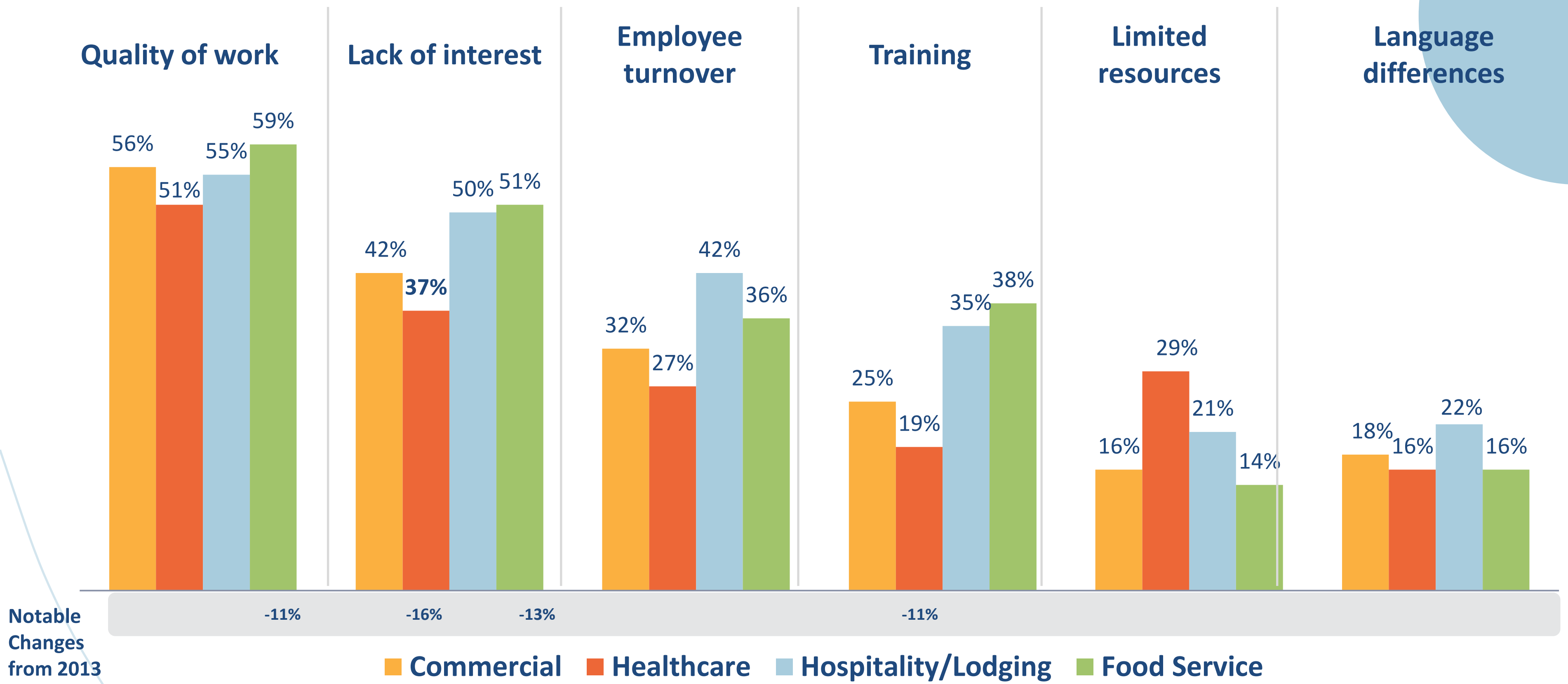
Obstacles to smooth running of the department, 2014

	2014	2013	2011
Staff effort & attitude - unhappy or unmotivated employees	36%	39%	39%
Budget cuts/limited resources/understaffed	27%	25%	35%
Training due to staff turnover	20%	22%	30%
Confusion and difficulty remembering what products do	11%	9%	9%
Buying too many cleaning products	10%	8%	7%
Other	1%	1%	2%
There are no operational inefficiencies	27%	25%	17%

Q. Based on your experience, what are the top three (3) challenges with managing a cleaning staff today? (Please select up to three)
Q. Which of the following, if any, prevents your business' cleaning department from running as smoothly as possible? (Please select one)
Base: All Respondents 2011 (n=400); 2013 (n=408); 2014 (n=401)

Tracking Results by Sector: Top Challenges

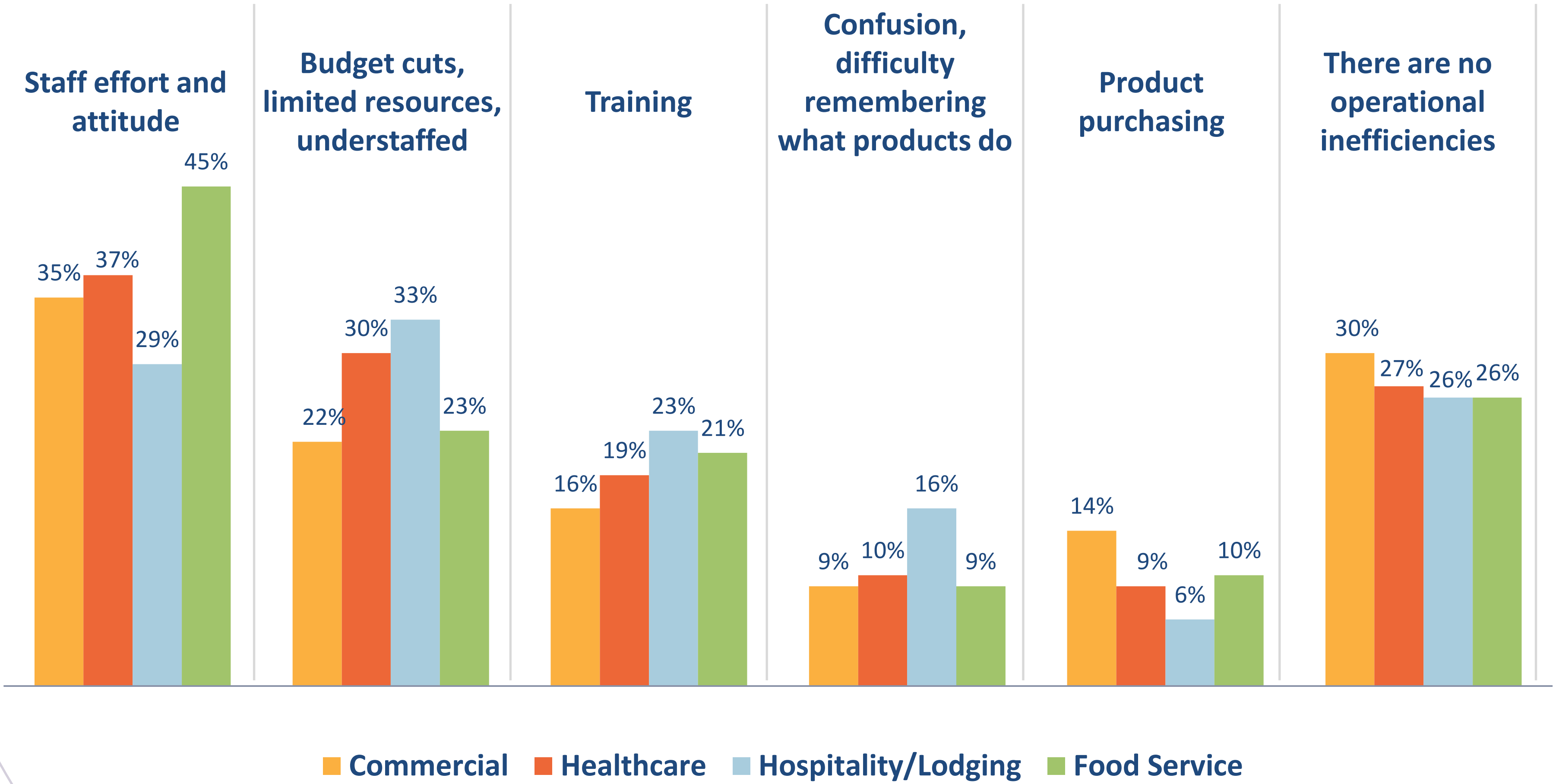
- Quality of work is the top challenge across sectors, followed by lack of interest. However, lack of interest is less likely to be cited as a challenge by those in the Healthcare and Food Service sectors vs. 2013.
- Training is more likely to be a challenge to those in the Hospitality/Lodging and Food Service sectors, with those in Healthcare showing a significant decline since last year.



Q. Based on your experience, what are the top three (3) challenges with managing a cleaning staff today? (Please select up to three) (Please select all that apply)
Base: All Respondents: 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: Barriers to Cleaning Department Running More Smoothly

- Compared to 2013, there are no significant changes when it comes to the barriers preventing their departments from running more smoothly. Staff effort and attitude is still the top issue in the Commercial, Healthcare, and Food Service sector in particular, while limited resources remains the top barrier in the Hospitality/Lodging sector.

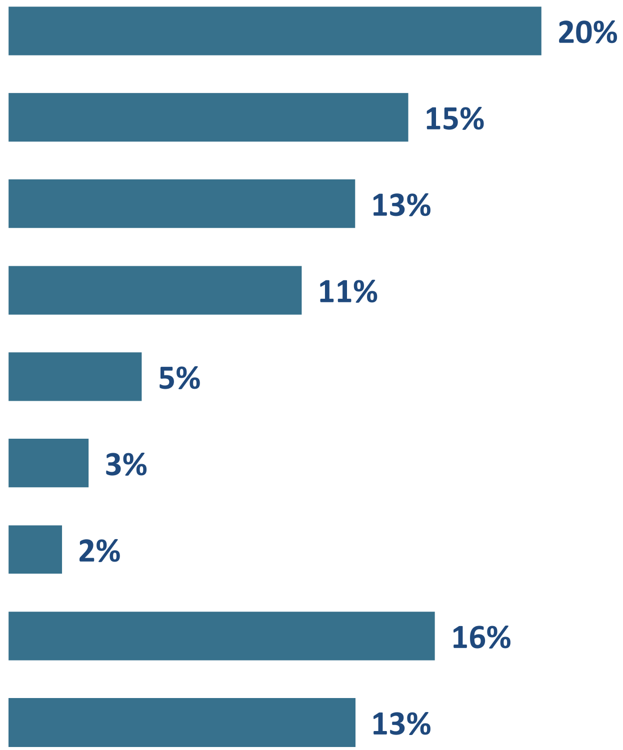


Q. Which of the following, if any, prevents your business' cleaning department from running as smoothly as possible? Please select one)
Base: All Respondents: 2014 (n=401); 2013 (n=408)

Biggest Challenge to Effective Cleaning- Related Training

- The biggest challenges associated with effective cleaning-related training in 2014 are similar to those identified in 2013, with “loss of work productivity” remaining the top challenge, selected by one in five.
- Roughly one in eight select the cost of training, language differences, and availability of qualified training leaders as obstacles to effective training.

Challenges in Effective Cleaning-Related Training 2014



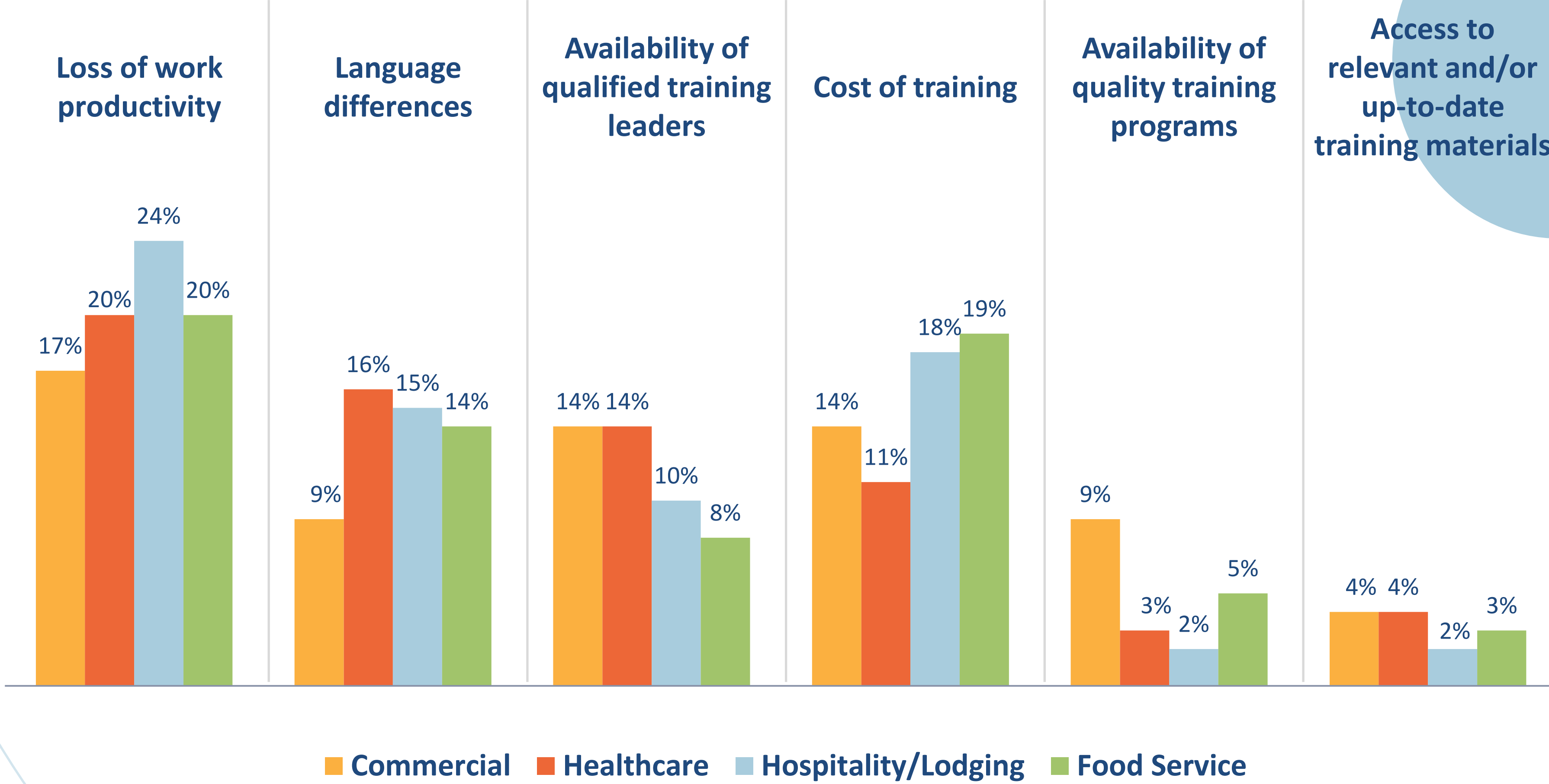
	2014	2013	2011
Loss of work productivity	20%	20%	18%
(Actual) Cost of training *	15%	12%	13%
Language differences	13%	14%	17%
Availability of qualified training leaders	11%	12%	18%
Availability of quality training programs	5%	7%	7%
Access to relevant and/or up-to-date training materials	3%	5%	n/a
Other	2%	2%	3%
None of the above	16%	16%	13%
Don't know/not sure	13%	13%	11%

** Note: Differences in response options and wording limit comparability of 2011 to both 2013 and 2014.*

Q. Based on your experience, which of the following is the biggest challenge/obstacle to effective cleaning-related training? Please select one. Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Biggest Challenge / Obstacle to Effective Cleaning-Related Training

- When it comes to obstacles to effective cleaning-related training, attitudes are very much on par with 2013 in each of the four sectors.

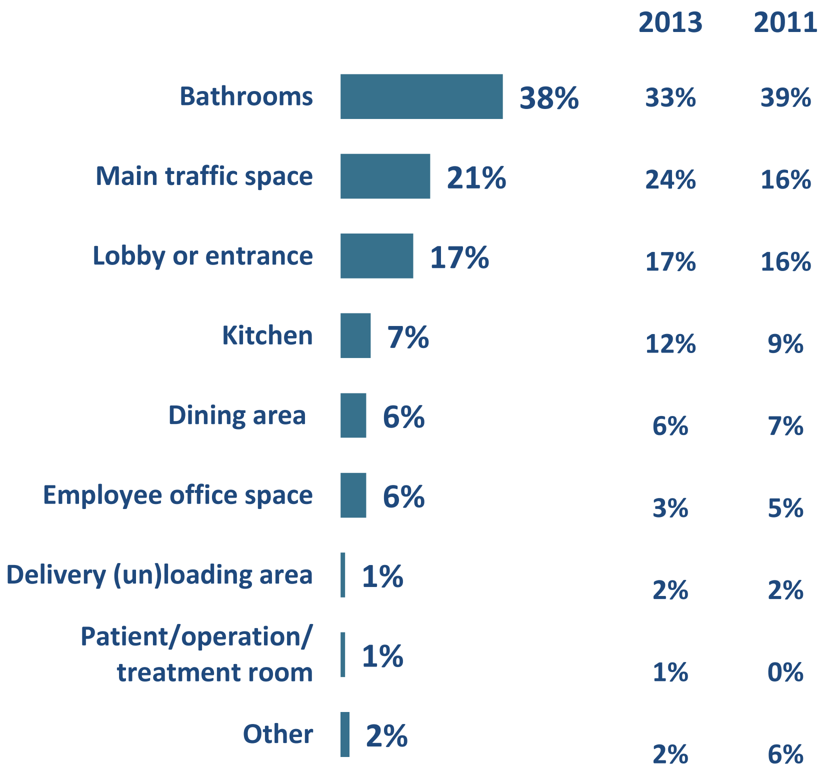


Q. Based on your experience, which of the following is the biggest challenge/obstacle to effective cleaning-related training? Please select one
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

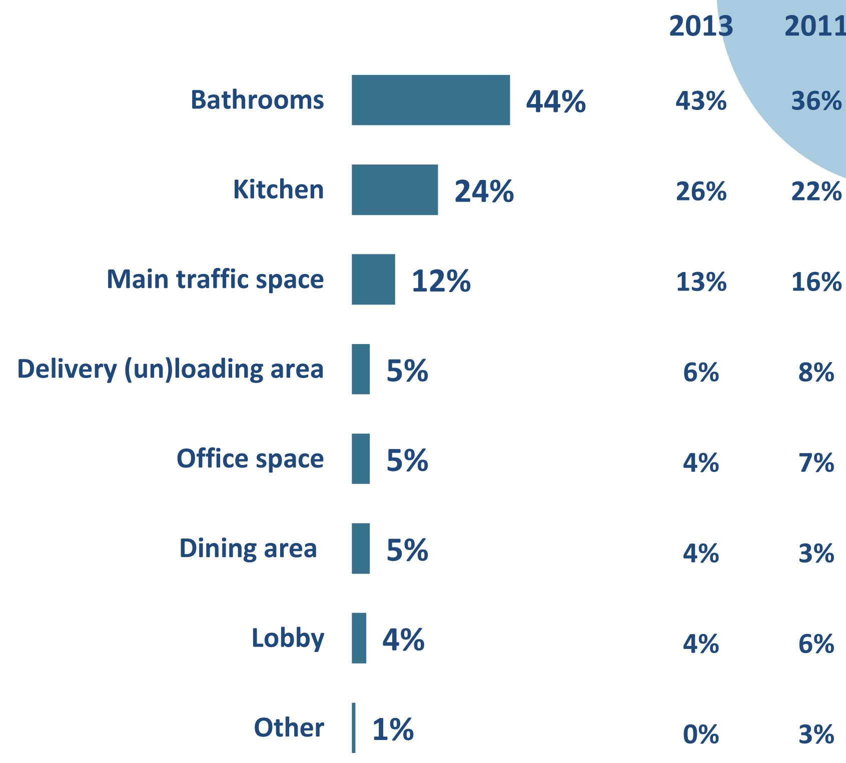
Most Important Areas to Customers / Most Difficult Areas to Clean

- Views of cleaning managers in 2014 are very similar to those of 2013 in terms of the areas which they believe are most important for their customers to be kept clean: bathrooms, main traffic space, and lobby.
- Views are also consistent in terms of the areas most difficult to clean: bathrooms, kitchen, and main traffic space.

Most important areas to Customers 2014



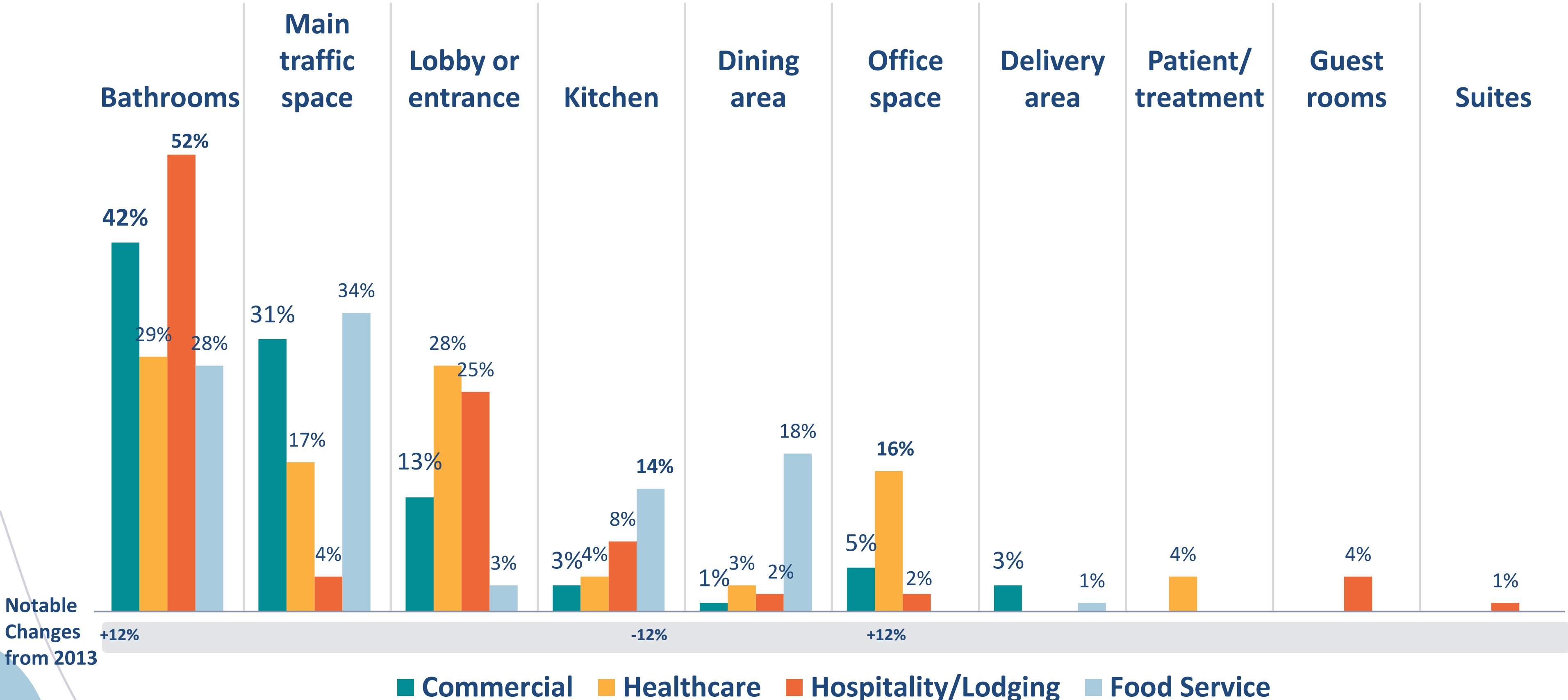
Areas most difficult to clean 2014



Q. In your opinion, the cleanliness of which of the following areas is most important to your customers? (Select one)
Q. In your opinion, which of the following areas is usually most difficult to clean? (Select one)
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Most Important Areas to Clean

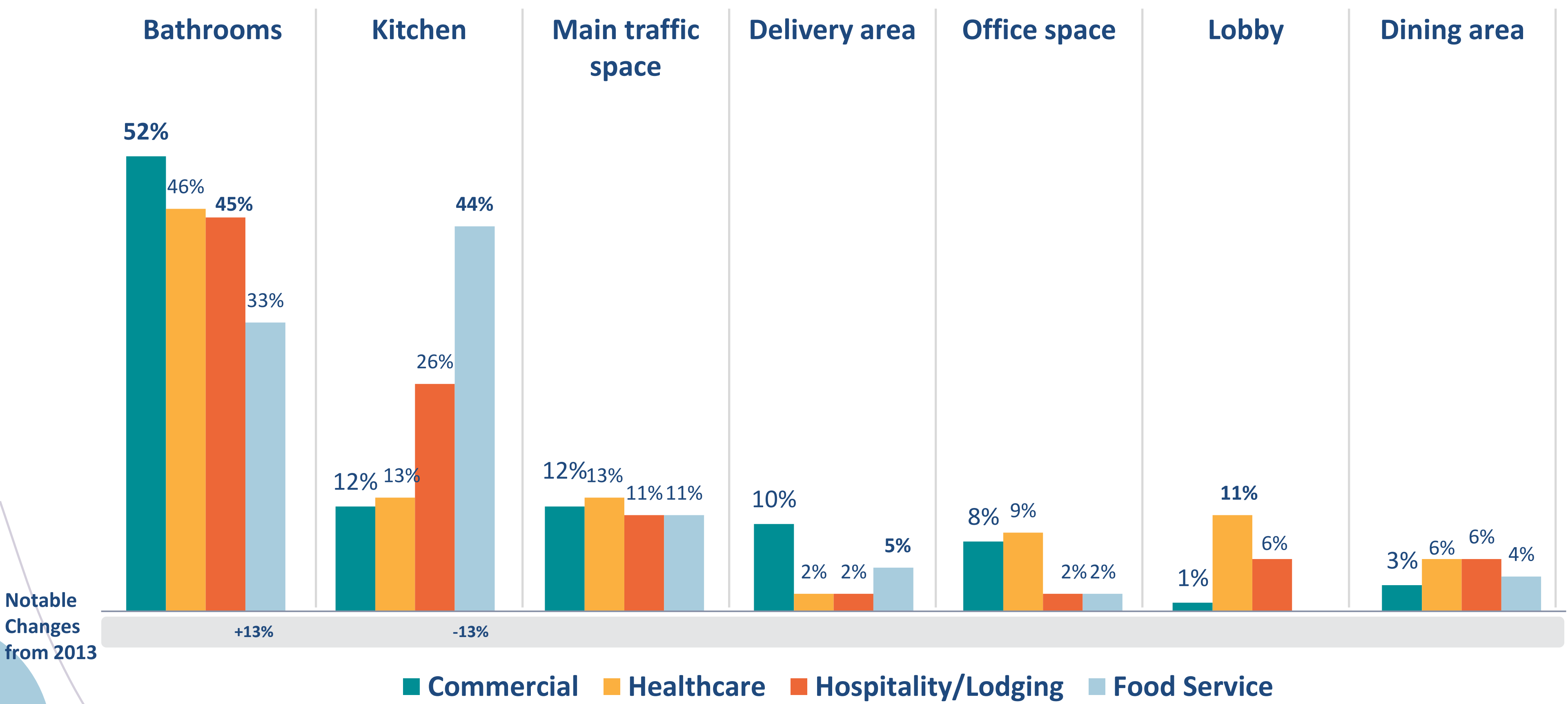
- Across all sectors, bathrooms are ranked as the most important area to be kept clean for customers (particularly in the Hospitality/Lodging and Commercial sectors).



Q. In your opinion, the cleanliness of which of the following areas is most important to your customers? (Select one)
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Most Difficult Areas to Clean

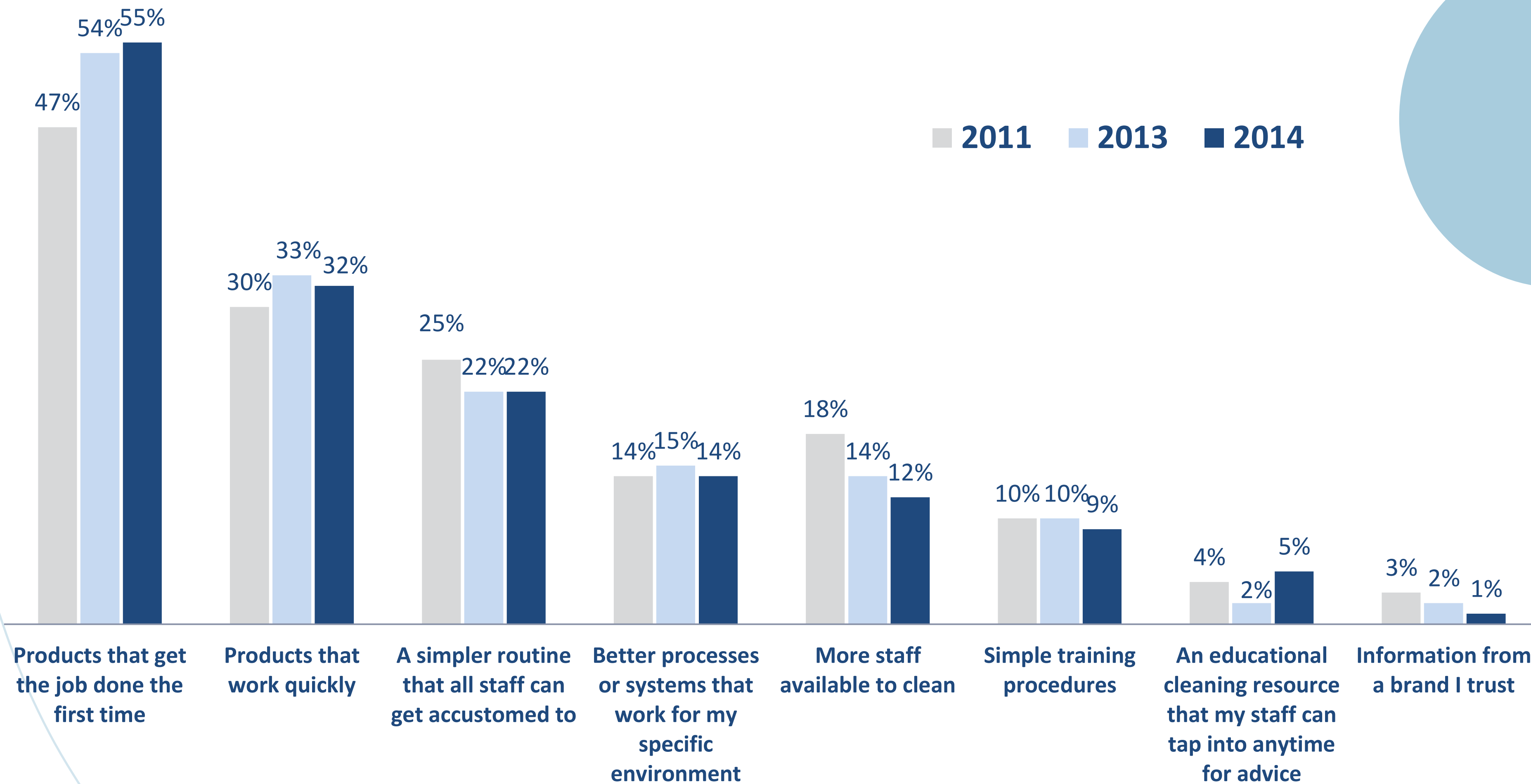
- Across all but the Food Service sector, bathrooms are ranked as the most difficult are to clean (particularly in the Hospitality/Lodging and Commercial sectors).
- By contrast, those in Food Service are more likely to say that the kitchen is most difficult to clean.



Q. In your opinion, which of the following areas is usually most difficult to clean? (Select one)
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

Helpful Factors for Performing Cleaning Services

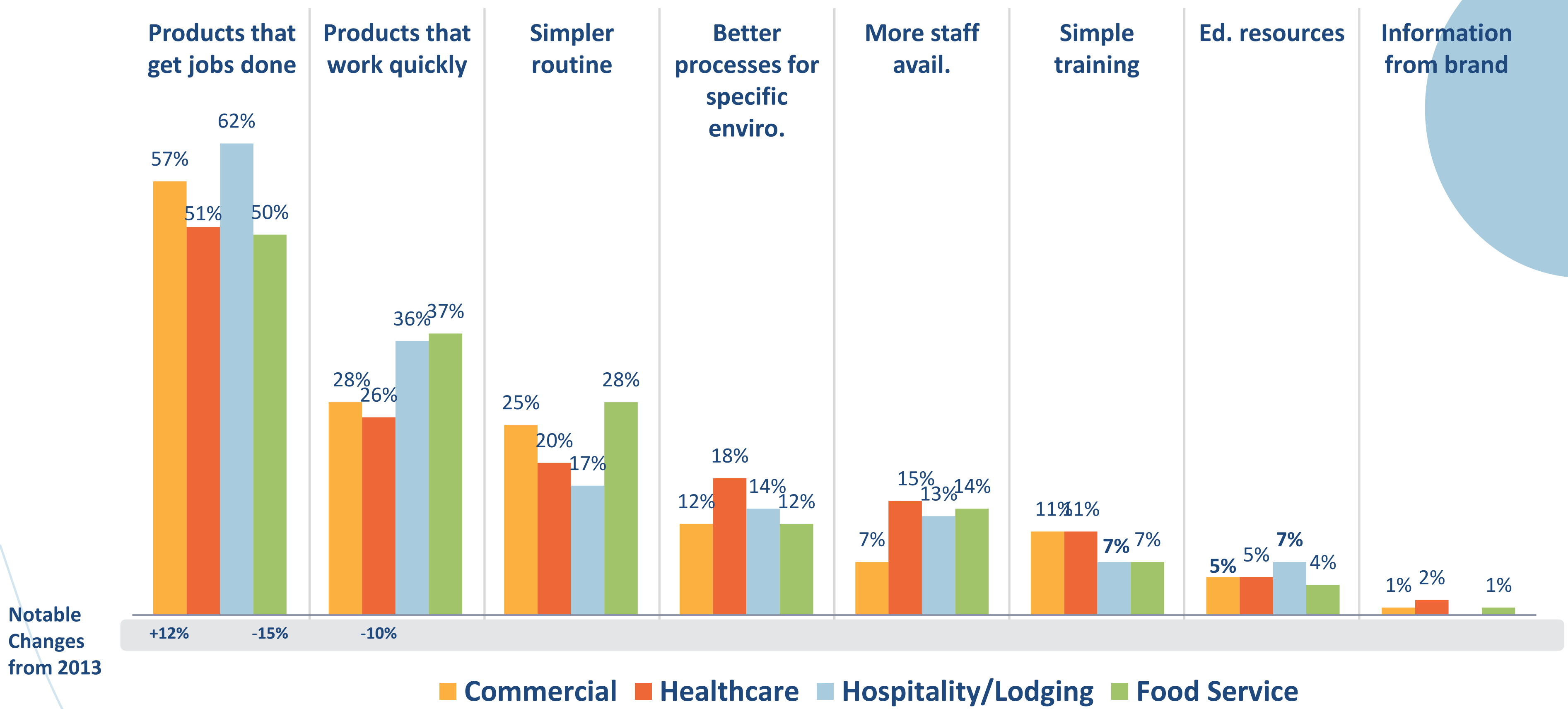
- Cleaning managers continue to believe that products that get the job done the first time are most helpful in terms of performing cleaning services.



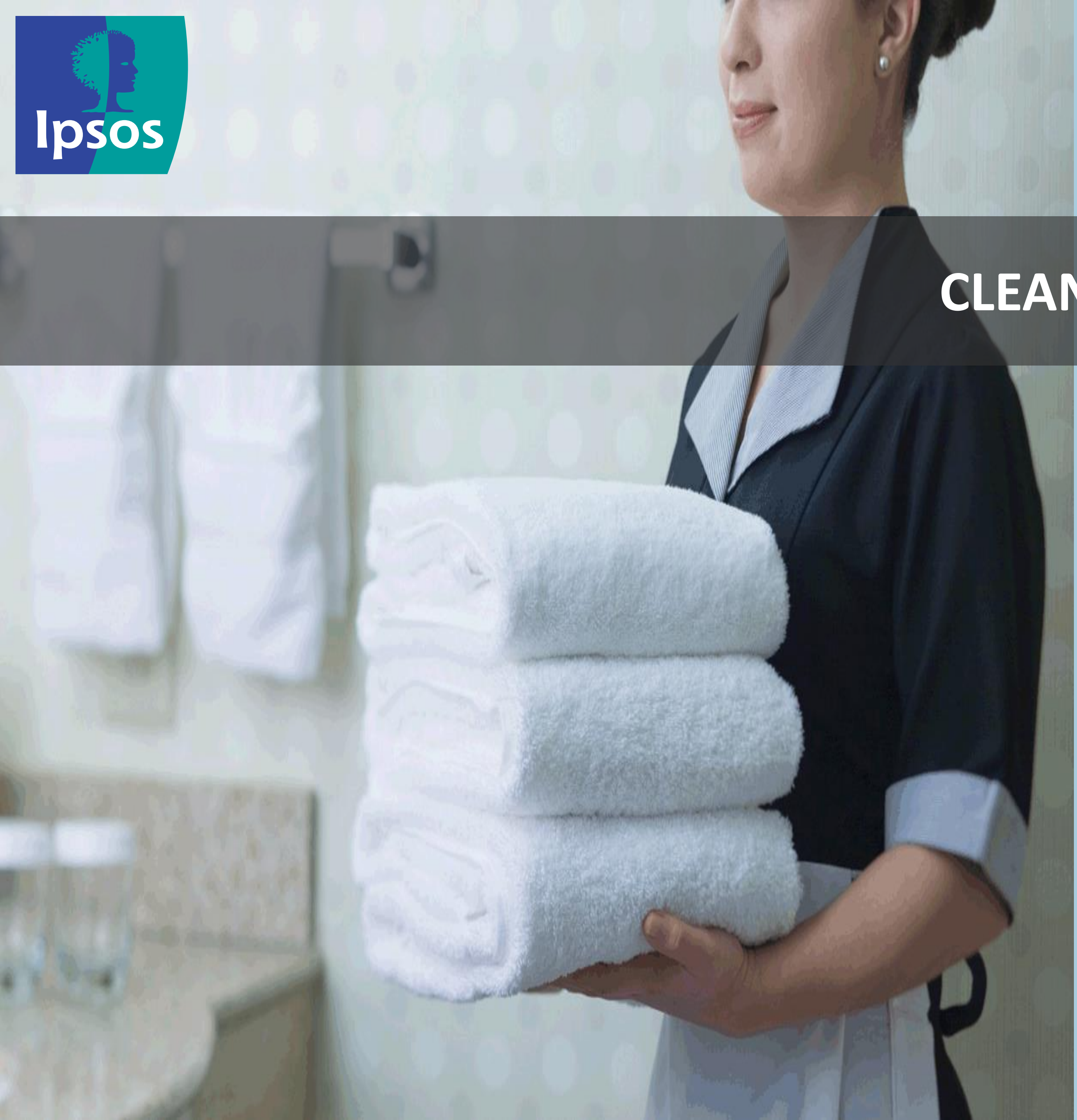
Q. In your opinion, which of the following would be most helpful when it comes to performing your cleaning services? (Select up to two)
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Helpful Factors for Performing Cleaning Services

- Cleaning managers across sectors have similar views about what be most helpful when performing their cleaning services: Products that get the job done.



Q. In your opinion, which of the following would be most helpful when it comes to performing your cleaning services?
Base: All Respondents: 2014 (n=401); 2013 (n=408)

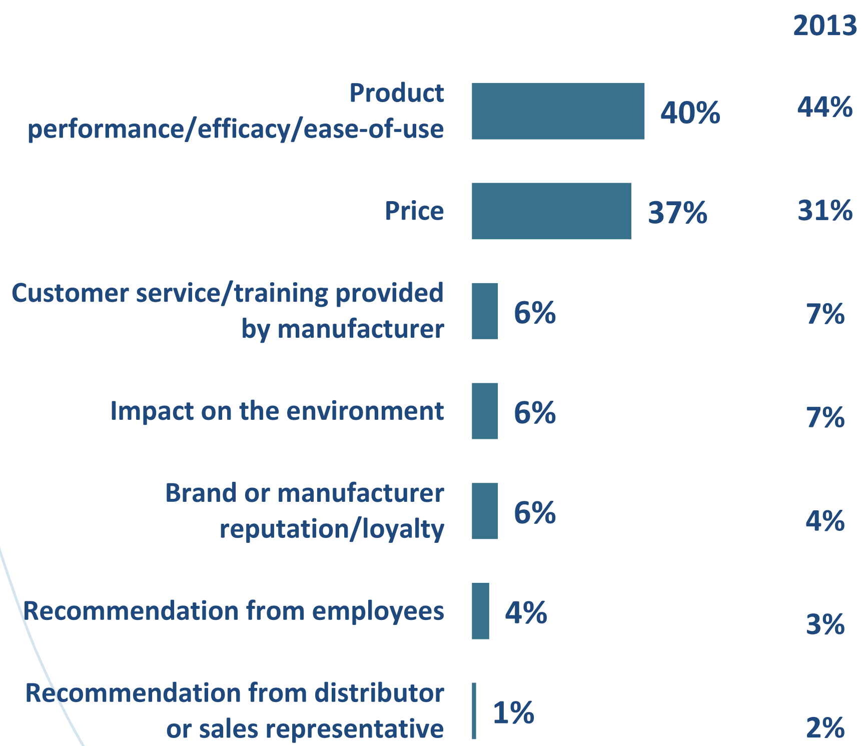


CLEANING PRODUCTS

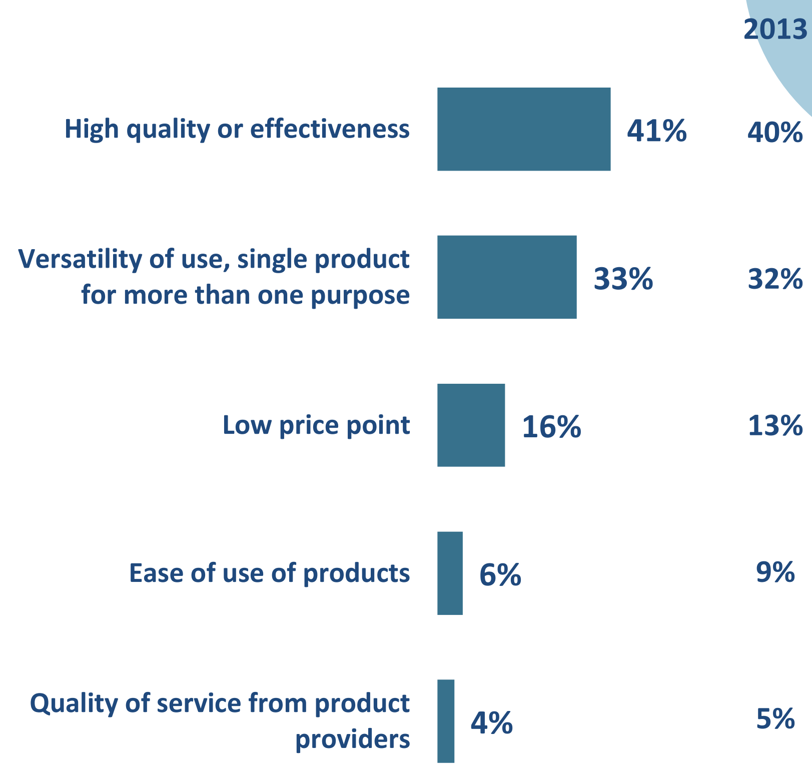
Top-Ranked Factors in Purchase Decisions and Definitions of Value

- As in 2013, product performance/efficacy and price are the most important factors impacting their purchase decisions when it comes to cleaning products.. However, a slightly greater proportion now select price compared with last year.
- High quality/effectiveness and versatility of use also remain the qualities that best define value in cleaning products, more so than price, ease of use, or quality of service from product providers.

Most important factors in cleaning products 2014 (#1 Rank)



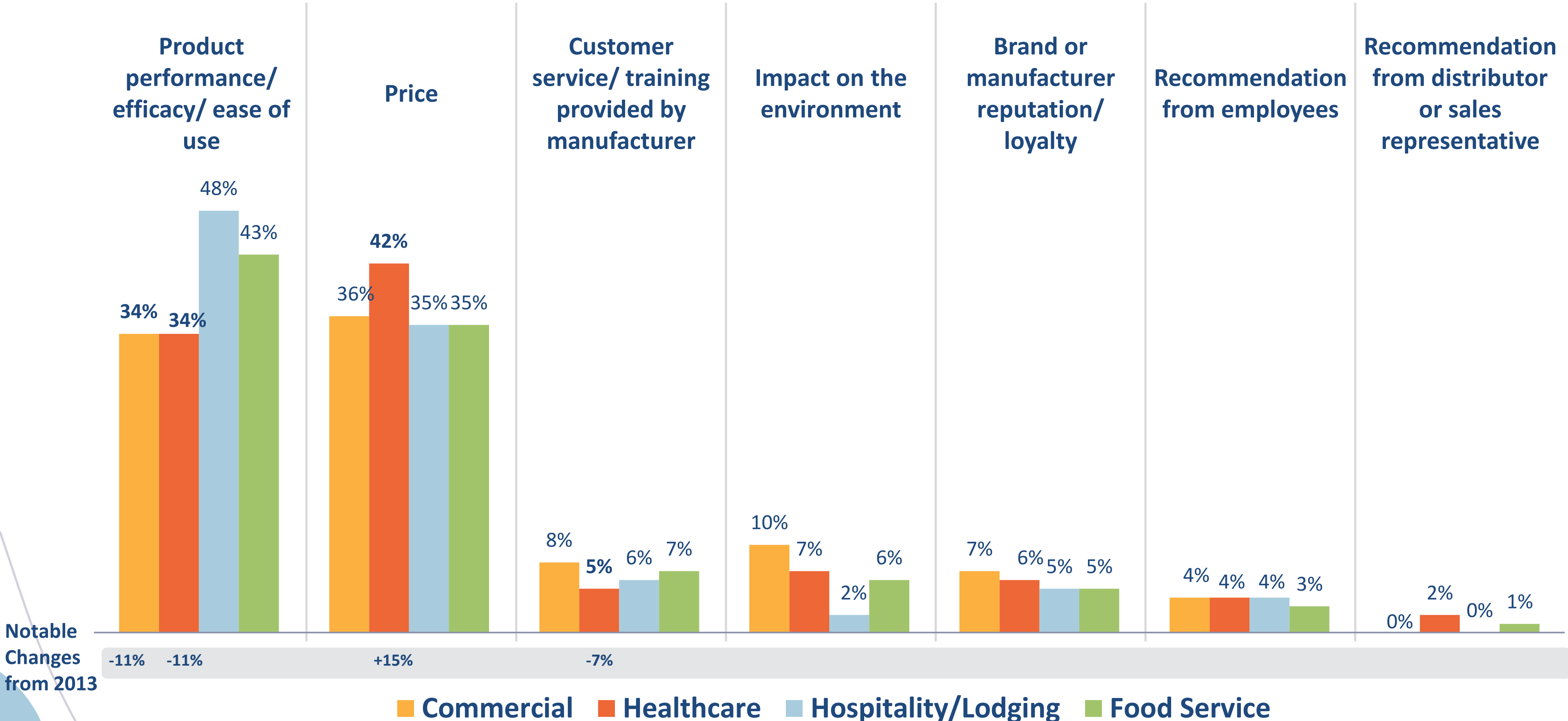
What defines value 2014



Q. 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)
Q. 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: 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: Top-Ranked Factors in Purchase Decisions

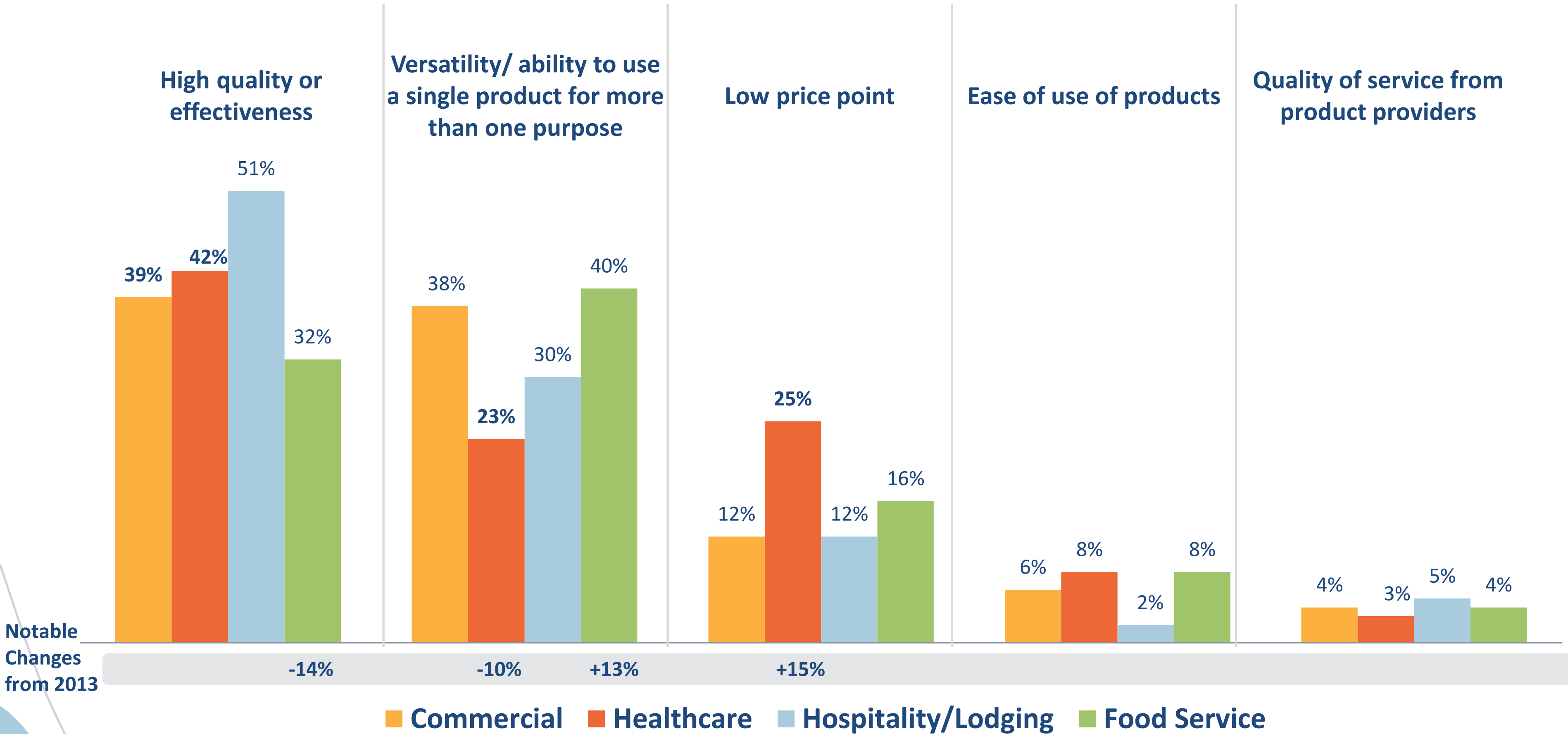
- When making purchase decisions, product efficacy and price are by far the most important factors across sectors. However, product performance is slightly less likely to be an influential factors in the Commercial and Healthcare sectors, which both show declines vs. 2013.



Q. 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: 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: Definitions of Value

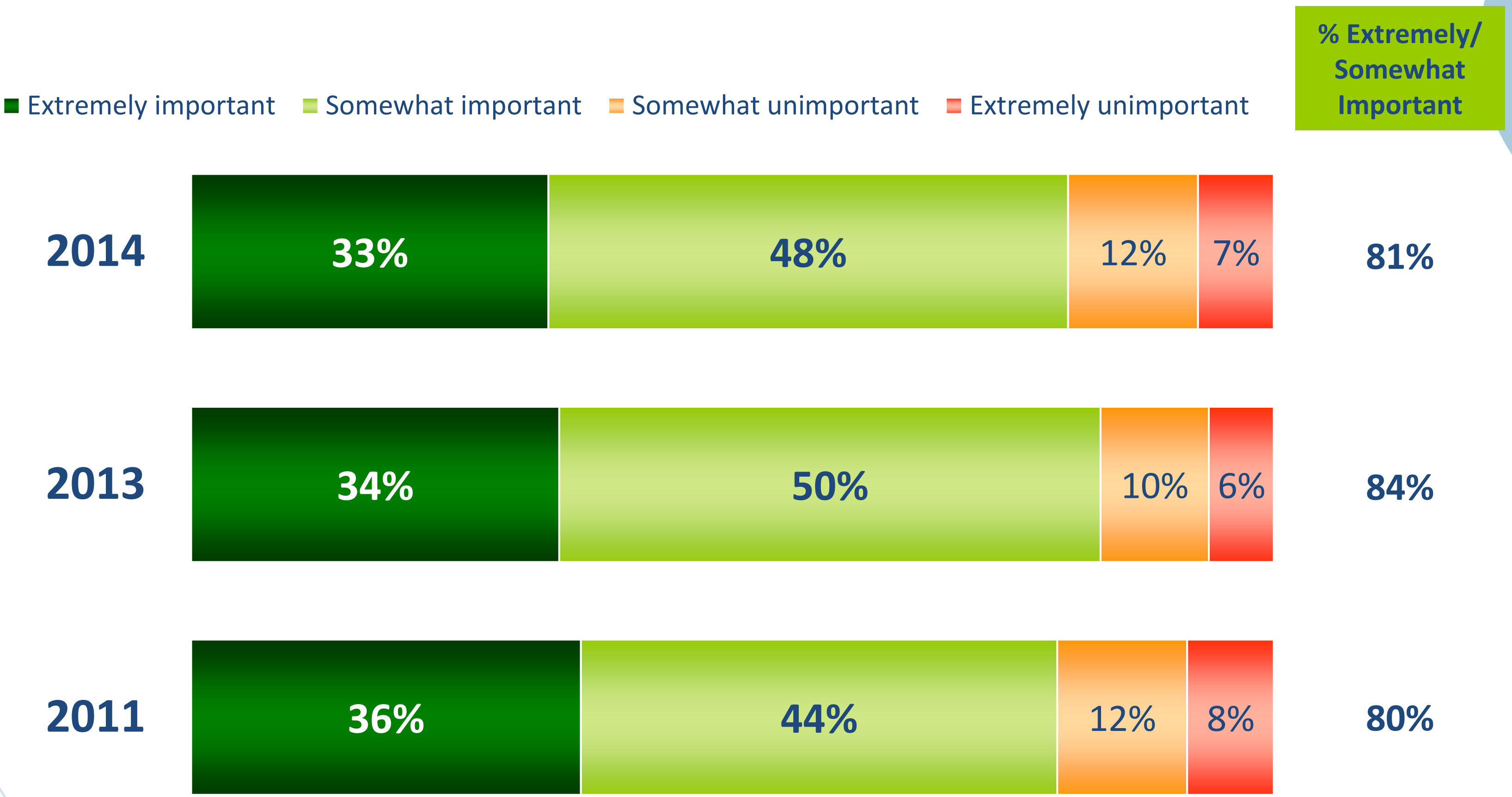
- In terms of what best defines value, fewer respondents in the Food Service Sector now consider "high quality or effectiveness" to define value, compared to 2013, while significantly more now equate "versatility of use" with value.
- Those in the Healthcare sector are currently more likely to say that value is defined by a low price point vs. last year.



Q. 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: 2014 (n=401); 2013 (n=408)

Importance of Feedback from Personnel about Cleaning Products

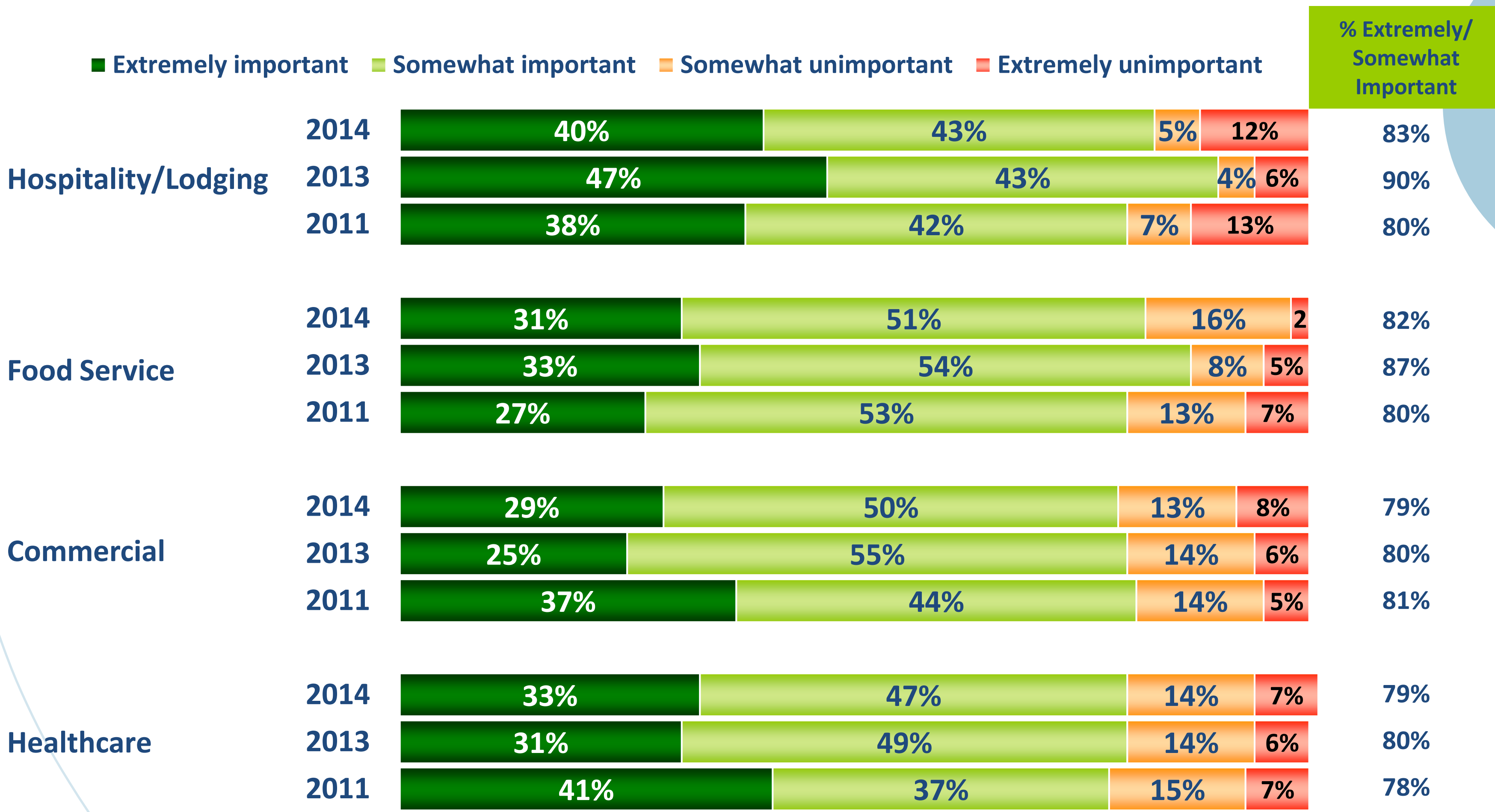
- The feedback of cleaning personnel about the products being used continues to be deemed important by about eight in ten cleaning managers, including a third who say that it is *extremely* important.



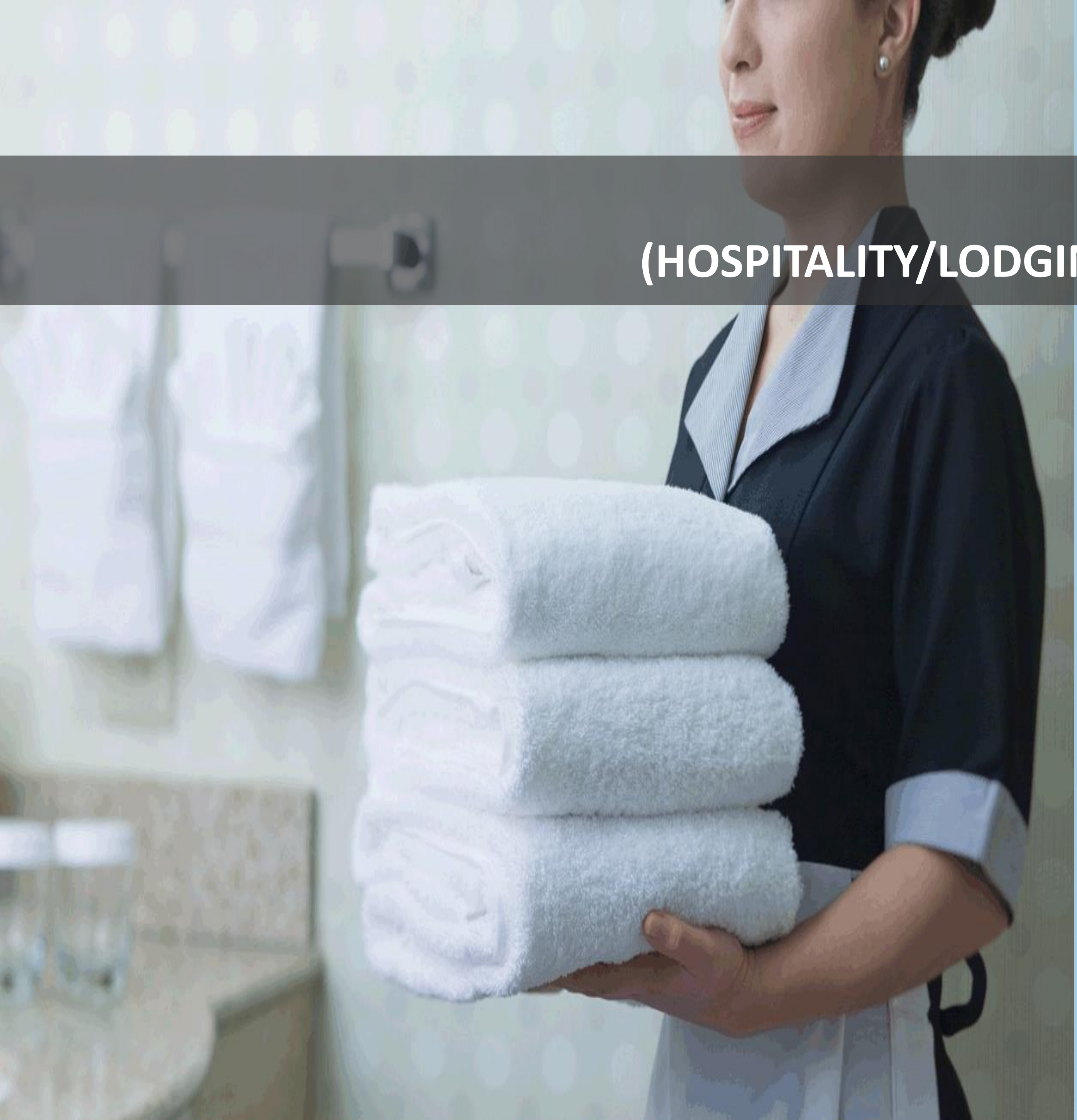
Q. In your organization, how important are the opinions and feedback of cleaning personnel regarding the products being used?
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)

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

- Cleaning managers across all sectors have similar views about the importance of feedback from their cleaning personnel: It is important.



Q. In your organization, how important are the opinions and feedback of cleaning personnel regarding the products being used?
Base: All Respondents: 2014 (n=401); 2013 (n=408); 2011 (n=400)



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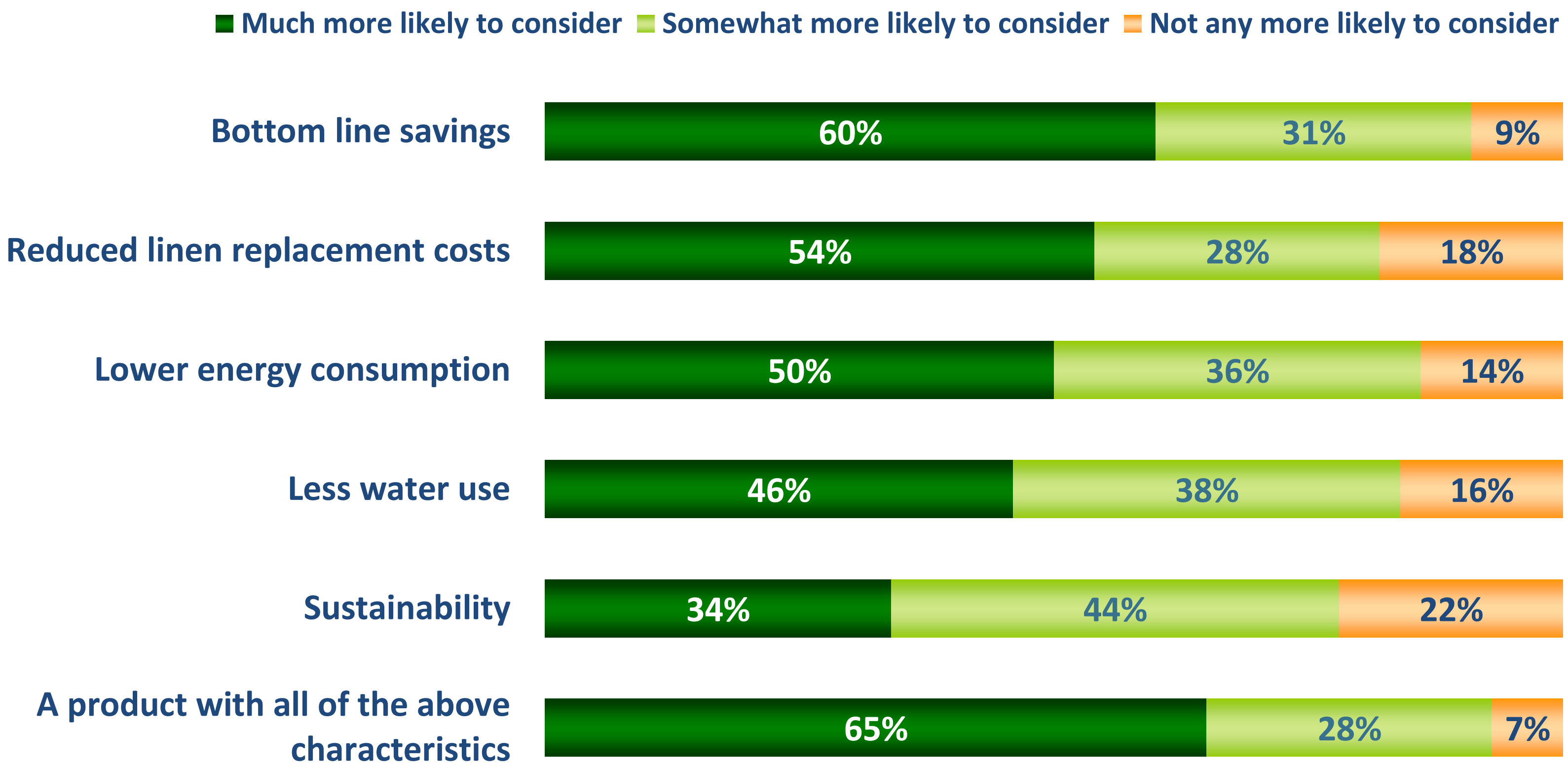
LAUNDRY
(HOSPITALITY/LODGING SECTOR ONLY)

Factors in considering a laundry care product:
Hospitality/Lodging Sector Only

- Two-thirds of cleaning managers in the Hospitality/Lodging sector say that they would be much more likely to consider a laundry product that would offer bottom line savings, reduced linen replacement costs, lower energy consumption, less water use and sustainability.
- Among these benefits, bottom-line savings emerges as the factor that would lead the greatest proportion of cleaning managers to consider a laundry care product

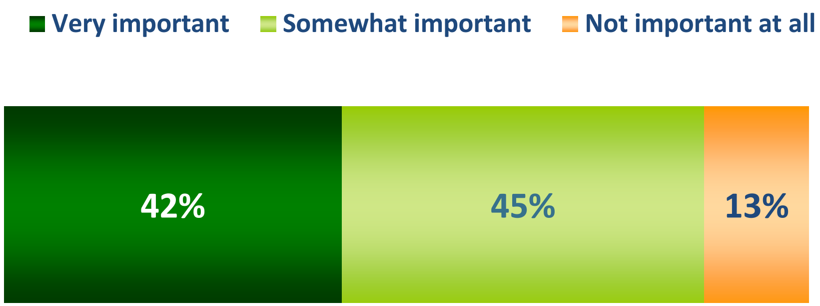


Q. Please indicate to what extent you would be more likely to consider a laundry care product that offers…
Base: Hospitality/Lodging Respondents (n=100)

Balancing costs with product price:
Hospitality/Lodging Sector Only

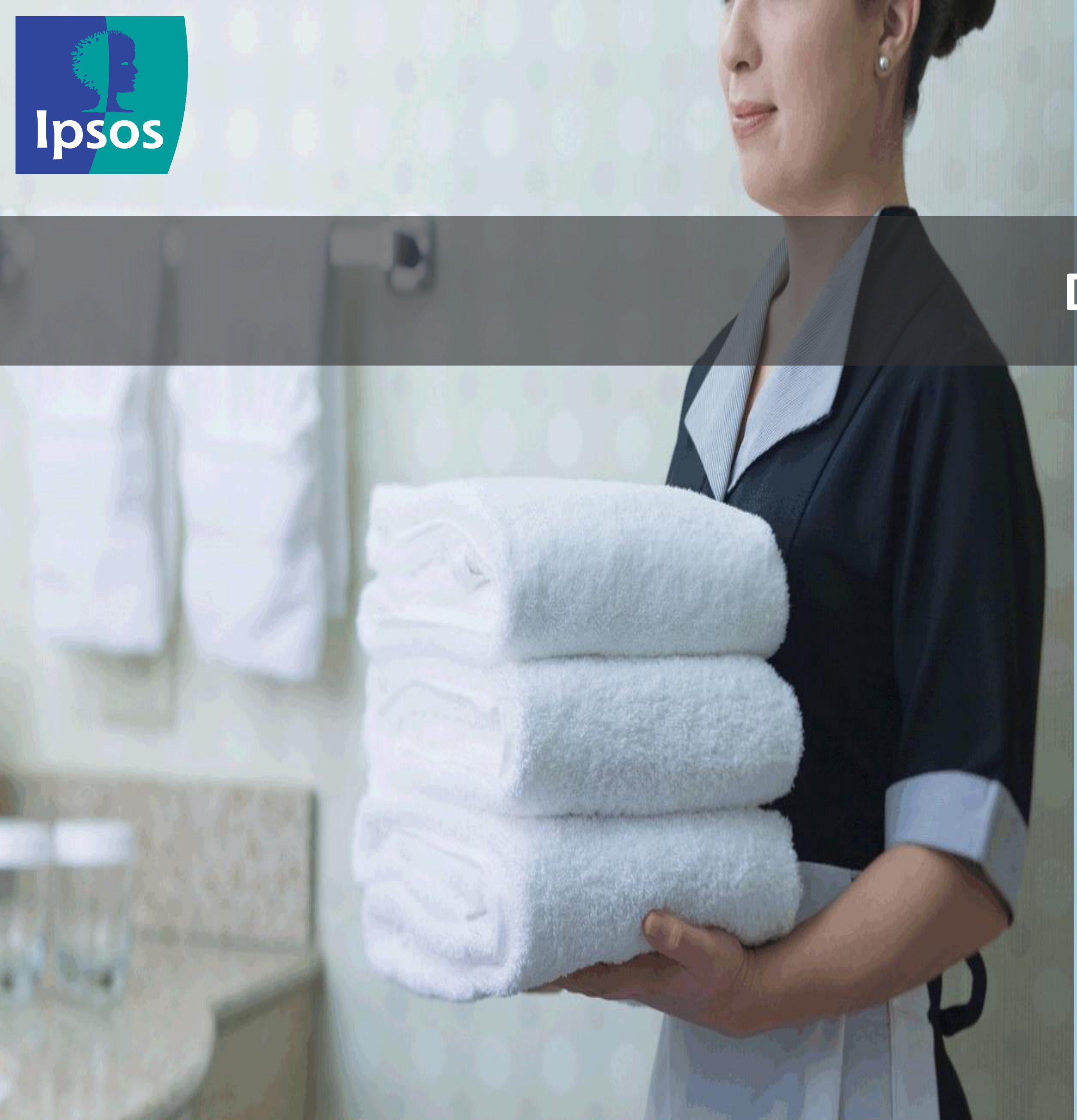
- Four in ten cleaning managers in the Hospitality/lodging sectors say that it is very important to reduce laundry operating costs when it comes to laundry care. In fact, over nine in ten say they would be at least somewhat willing to pay more for a product that would reduce laundry costs through linen replacement savings, energy savings, and less water use; including 30 percent say that they would be *very* willing.

Importance of reducing laundry costs in terms of laundry care



Willingness to pay more for a cost-reducing product

Q If you knew of a product that would reduce laundry operating costs through linen replacement savings, energy savings and less water use, to what extent would you be willing to consider paying more for this product?
Q30 How important is reducing laundry operating costs when it comes to laundry care?
Base: Hospitality/Lodging Respondents (n=100)



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DEMOGRAPHICS

Job title/Function

	Total	Food Service	Hospitality/ Lodging	Commercial	Healthcare
Owner/operator/proprietor	48%	52%	41%	55%	43%
General Manager	28%	27%	29%	26%	32%
Maintenance/operations/housekeeping manager	5%	5%	6%	6%	5%
Building/ facility manager	5%	2%	5%	6%	6%
Purchasing manager	4%	4%	4%	3%	5%
Manager/ office manager	2%	3%	4%	-	3%
Director	2%	-	5%	-	4%
Administration/Executive administrator	1%	2%	-	2%	-
Supervisor	1%	1%	-	1%	1%
Other	6%	6%	5%	3%	7%

Respondents by Number of Employees and Decision-Making Role

	Total	Food Service	Hospitality/ Lodging	Commercial	Healthcare
Number of Employees Currently in Company					
1 - 10	45%	25%	43%	67%	47%
11 - 50	20%	39%	15%	10%	17%
51 - 100	7%	9%	12%	1%	8%
101 - 1,000	15%	11%	19%	12%	17%
1,001 - 10,000	7%	11%	4%	4%	8%
Over 10,000	5%	5%	7%	6%	4%
Person who Makes most of the Cleaning Product Decisions for Business					
Myself	65%	63%	62%	67%	69%
Another employee below me	13%	22%	14%	9%	8%
Another employee at my level	11%	7%	12%	11%	15%
Another employee above me	8%	5%	12%	11%	5%
Other	2%	3%		2%	4%

Respondents by Age, Region, and Gender

	Total	Food Service	Hospitality/ Lodging	Commercial	Healthcare
Age					
18-39	12%	15%	12%	9%	13%
40-49	19%	23%	17%	14%	24%
50-59	34%	43%	30%	33%	29%
60+	35%	19%	41%	44%	35%
Region					
Northeast	24%	30%	25%	26%	16%
South	31%	31%	37%	26%	29%
Midwest	19%	18%	10%	22%	28%
West	26%	21%	28%	26%	28%
Gender					
Male	47%	57%	44%	47%	39%
Female	53%	43%	56%	53%	61%

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