Cleaning Industry Insights Survey

2015 Findings

June 2015

Methodology

- These are the findings from an Ipsos poll conducted from May 6th -13th, 2015 on behalf of Procter & Gamble Professional. For the survey, a sample of 400 managers/ decision makers working in cleaning operations (e.g. Contracting, Staffing, Training, Budgeting, Product Purchasing, etc.) and living in the US was interviewed online.
- These professionals were further divided into four segments: commercial, healthcare, hospitality/ lodging, and food service, in order to better capture and understand the relevant affairs that characterize the audiences that matter most to PGP.
- The precision of Ipsos online polls are measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 5.6 percentage points the general population.
- All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding.
- The 2015 study mirrors research conducted in 2011, 2013, and 2014 - both in terms of the questions and methodology, allowing for results that can be trended. The most recent wave was conducted May 1st-7th, 2014.
- Findings from this study are trended where applicable using arrows (↑/↓) and asterisks (*) to indicate any significant differences.

Executive Summary

Key Findings

Business Outlook and Efficiencies

- Overall, cleaning operations managers tend to have similar attitudes, opinions, and outlooks as in 2014.
  - ⇨ Perceptions continue to cautiously improve when it comes to the recession being over (44% vs. 39% in 2014), while three quarters expect business within their sectors to improve.
  - ⇨ Those working in hospitality/lodging and food service are among those most likely to have this more positive outlook.
- Nearly nine in ten agree that their business has been effective in keeping its operating costs down in the past twelve months – on par with 2014 and 2013. A similar proportion further say that their company has been efficient in their cleaning operations more specifically.
  - ⇨ Finding ways to become more efficient continues to be viewed across all sectors as the preferred course of action to improve the bottom line, compared to other measures such as raising prices.
  - ⇨ Reducing waste, retaining staff/reducing turnover, and training staff are the most common ways in which businesses are seen to have become more efficient over the last two years – the latter two up significantly since 2014.
  - ⇨ However, the pressure to keep operating costs low is still very real, with over three quarters saying that they have felt some pressure to keep costs down in the last twelve months.
- Despite a slightly more positive outlook on the recent economic climate, respondents continue to cut back in similar areas as they did in past years, with the proportion of those who say that their company has not cut back on anything (17%) consistent with results from 2013, 2014.
  - ⇨ Office supplies and luxuries remain top areas for cutbacks, particularly for Commercial and Healthcare respondents.
  - ⇨ Staff remains to top area when it comes to taking a "doing more with less" approach.

Business Focus and Concern

- Keeping customers satisfied is seen as being most important for respondents' businesses right now – and for the fourth consecutive wave.
  - Growing the business , making a profit, and being as efficient as possible with current resources are also among the most important for businesses, selected by roughly one in five.
- However, customer satisfaction is also a top concern for cleaning managers, with two in five saying that their clients' dissatisfaction causes them to worry when thinking about their business in general, and just over half worrying about it when it comes to cleaning or disinfection as it relates to the business.
  - Concern with customer dissatisfaction – whether in regard to the business in general, or with respect to cleaning and disinfection more specifically – is particularly high among those working in the hospitality/ lodging and food service sectors.
  - Looking at food service specifically, quality of the food and customer service are top ranked when it comes to best serving customers, with nearly half saying that such factors concern them most with this process. Food safety is also top of mind here.
- When it comes to the business in general, other top concerns revolve around the market, such as worrying about a reduction in business caused by economic downturn and competitors doing a better job. Other major concerns revolve more around staffing issues, such as worrying about low staff morale and engagement and high staff turnover. While business concerns are on par with trends set in 2014, high staff turnover has become a much more prevalent issue in 2015.
  - Market influences, such as competitors doing a better job and budgetary cuts, are most likely to affect those in the commercial sector. However, competitors are also a cause for concern among those in the food service industry, while budgetary cuts are more prevalent in the healthcare sector.
- When it comes to concerns about cleaning or disinfection more specifically, those in the hospitality/lodging and food service sectors are among those most likely to say that they worry about customer satisfaction, food sanitation, pests/vermin, and negative publicity.

Cleaning Operations

- Overall, cleaning managers are as proud of their business's cleanliness, hygiene and cleaning procedures as they were in recent years, with two thirds rating their business as such (although this falls to 52% among commercial sector respondents).
  - Products – both those that get the job done the first time and those that work quickly - are most likely to be seen as being helpful when it comes to performing cleaning services.
  - Bathrooms continue to rank as the area where cleanliness is viewed as being most important to customers, as well as being the most difficult to clean – although the kitchen takes the lead when it comes to difficulty among food service respondents.
- When it comes to managing cleaning staff, the quality of the work is seen as one of the biggest challenges – although staffing issues such as lack of interest/motivation, employee turnover, and training are also notable concerns.
- Staff effort/ attitude and training (both up significantly compared to results seen in 2014) are also the most prevalent obstacles preventing respondents' cleaning departments from running as smoothly as possible.
  - Having staff that lack interest/motivation is significantly more of a challenge for those in the food service sector versus all other sectors. Obstacles caused by staff effort and attitude are also much more prevalent among this sector – although those in the healthcare field are also burdened by unhappy or unmotivated employees.
- When it comes to challenges associated with cleaning-related training, 'loss of work productivity' remains the most common obstacle across sectors except for commercial respondents, where the cost of training and language differences are more prominent.

Cleaning Products

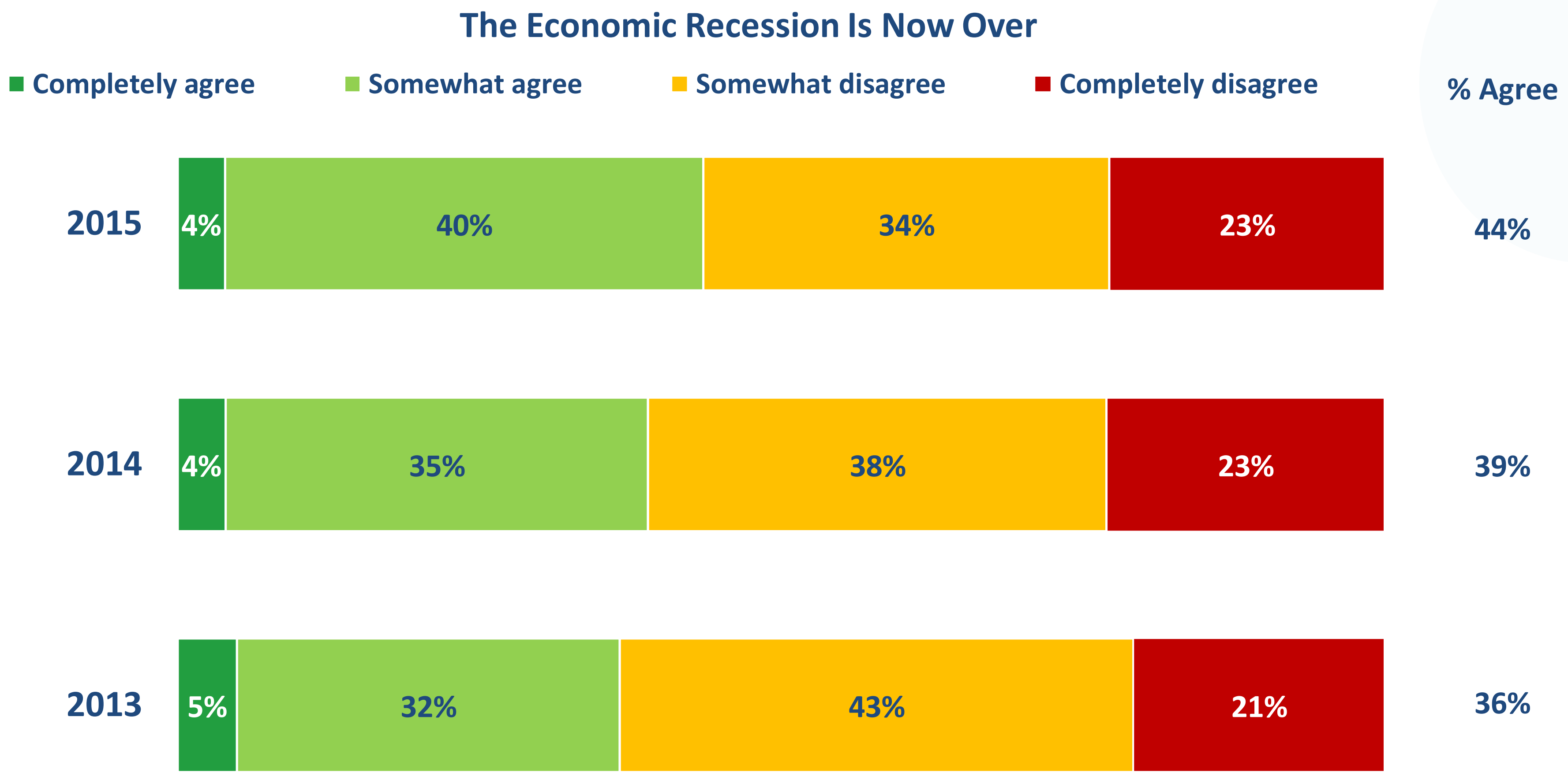
- When it comes to defining value with regard to cleaning products, high quality/ effectiveness and versatility stand out, while low price point, ease of use, and service from providers are not as strongly associated with value.
- In terms of making actual purchasing decisions, however, product performance/ease of use and price are among the most important factors, much more so than the environmental effects, customer service, brand reputation, and the recommendations from employees or sales reps that are associated with a product.
- The importance of feedback from personnel about cleaning products continues to be deemed important by more than eight in ten cleaning managers, including three in ten who say that such feedback is *extremely* important.
- When it comes to product suppliers, cleaning managers generally feel positively about their relationship with them, with more than eight in ten across all sectors agreeing that their suppliers get the job done and provide them we they need without any issues, while six in ten agree that their suppliers are not just vendors, but rather partners that they can trust.
  - ⇨ Respondents in the hospitality/lodging sectors are among those most likely to feel positively about their product suppliers.
- At the same time, nearly half feel like their suppliers are always trying to sell them new products that they aren't even sure they really need, while three in ten feel that their suppliers do not understand their business' needs.

Business Outlook and Efficiencies

Detailed Findings

Perceptions of Current Economic Climate

- Overall, more than two in five respondents agree that the economic recession is now over; a figure that has been on the rise since 2013.
- However, majorities still disagree with this statement, including nearly a quarter who *strongly* disagree.

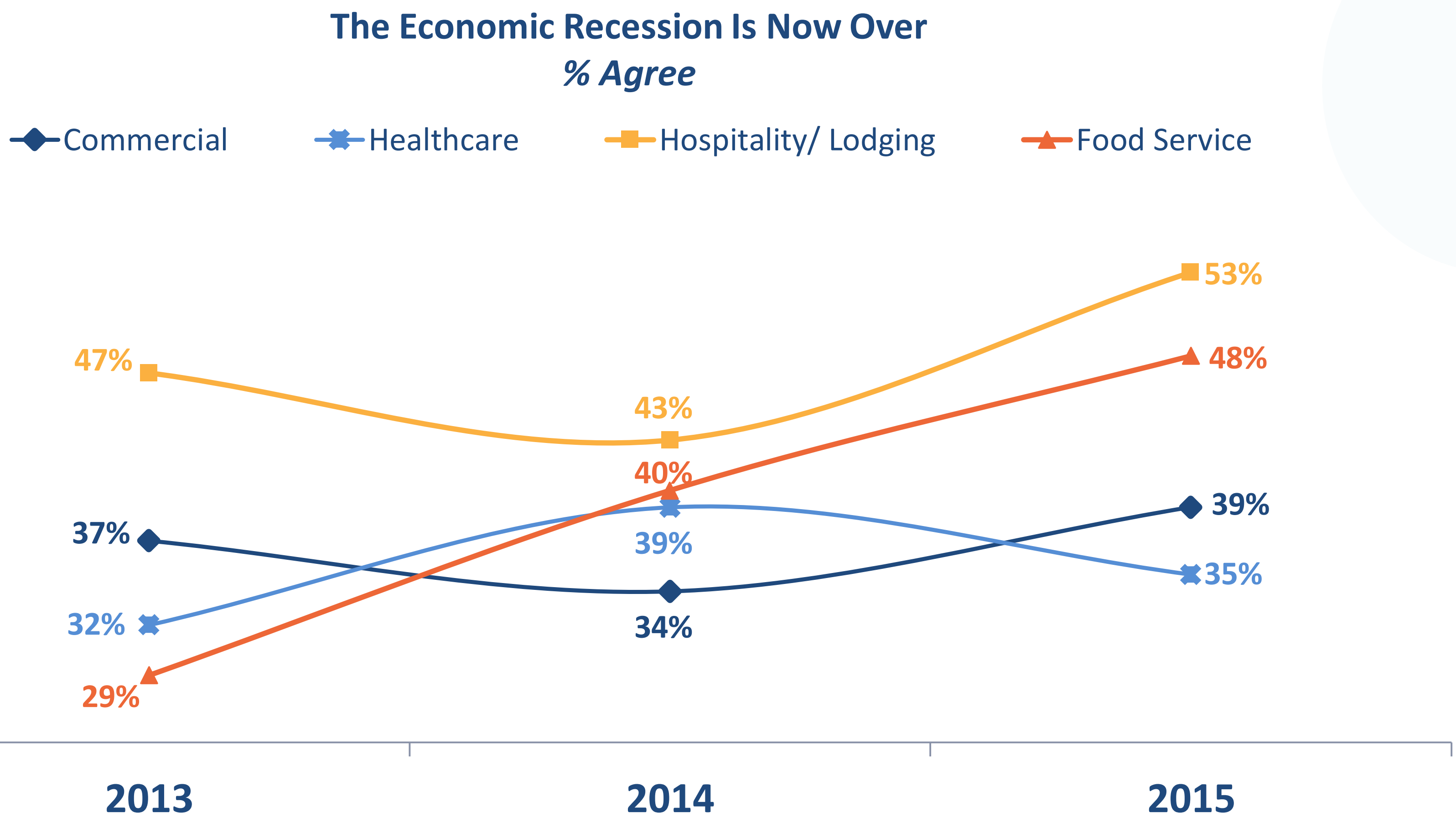


Arrows (↑/↓) denote significant shift vs. last wave.

Q24. To what extent do you agree or disagree with the following statements?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: Perceptions of Current Economic Climate

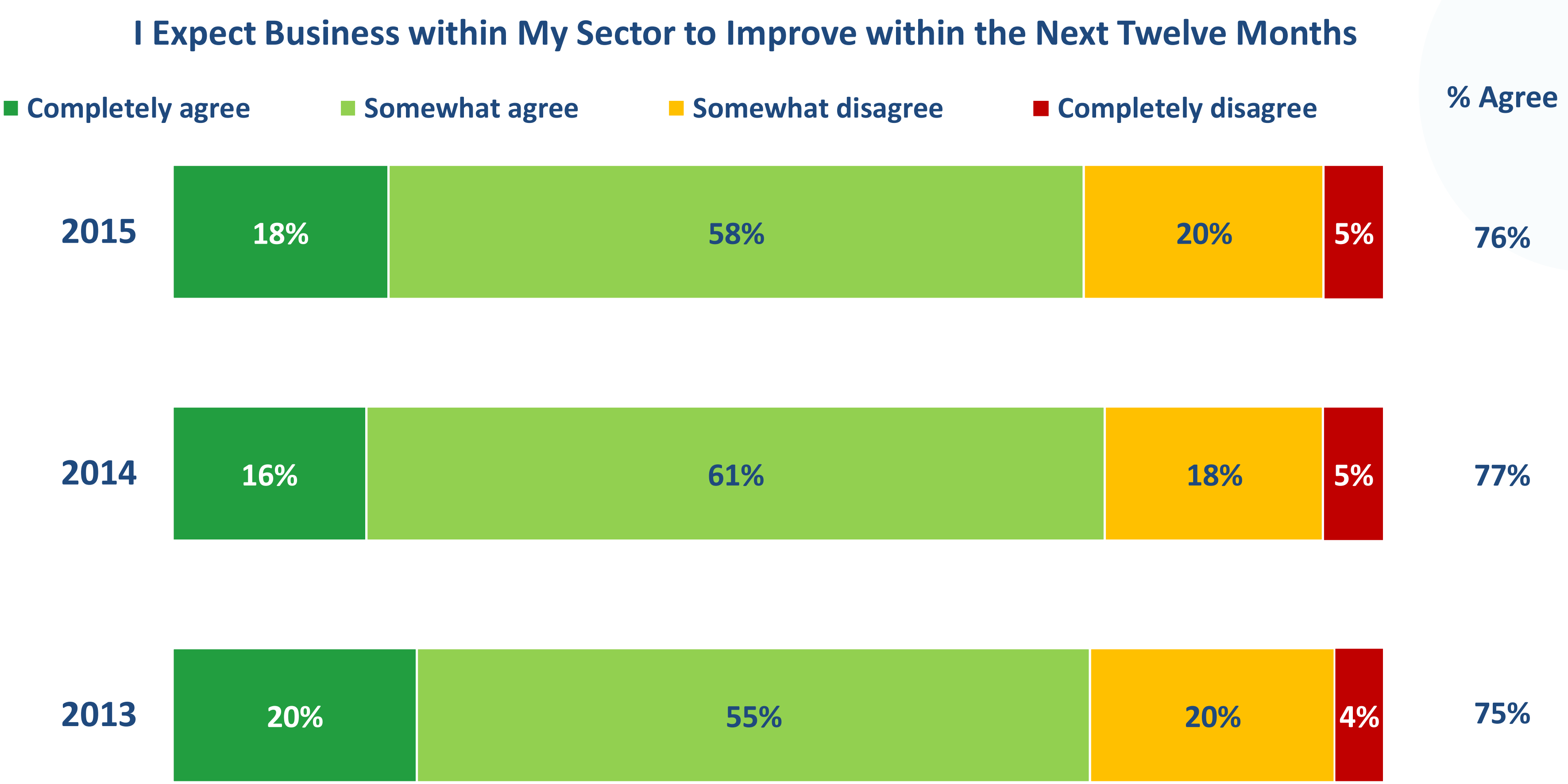
- Those working in the hospitality/lodging industry are among those most likely to agree that the economic recession is now over, as has been the case in past years as well.
- Those working in the food service industry follow closely behind, showing significant increases vs. 2013.
- Commercial and healthcare professional are not as optimistic, with slightly less than two in five respondents agreeing with this statement. This trend remains rather consistent across all three waves.



Q24. To what extent do you agree or disagree with the following statements?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

Perceptions of Business Sector

- Similar to last past years, three quarters of respondents overall say that they expect business within their sector to improve over the next year, including one in five who *completely* agree.
- Only a quarter disagree, including one in twenty who completely disagree that business within their sector will improve in the coming year.



Arrows (↑/↓) denote significant shift vs. last wave.

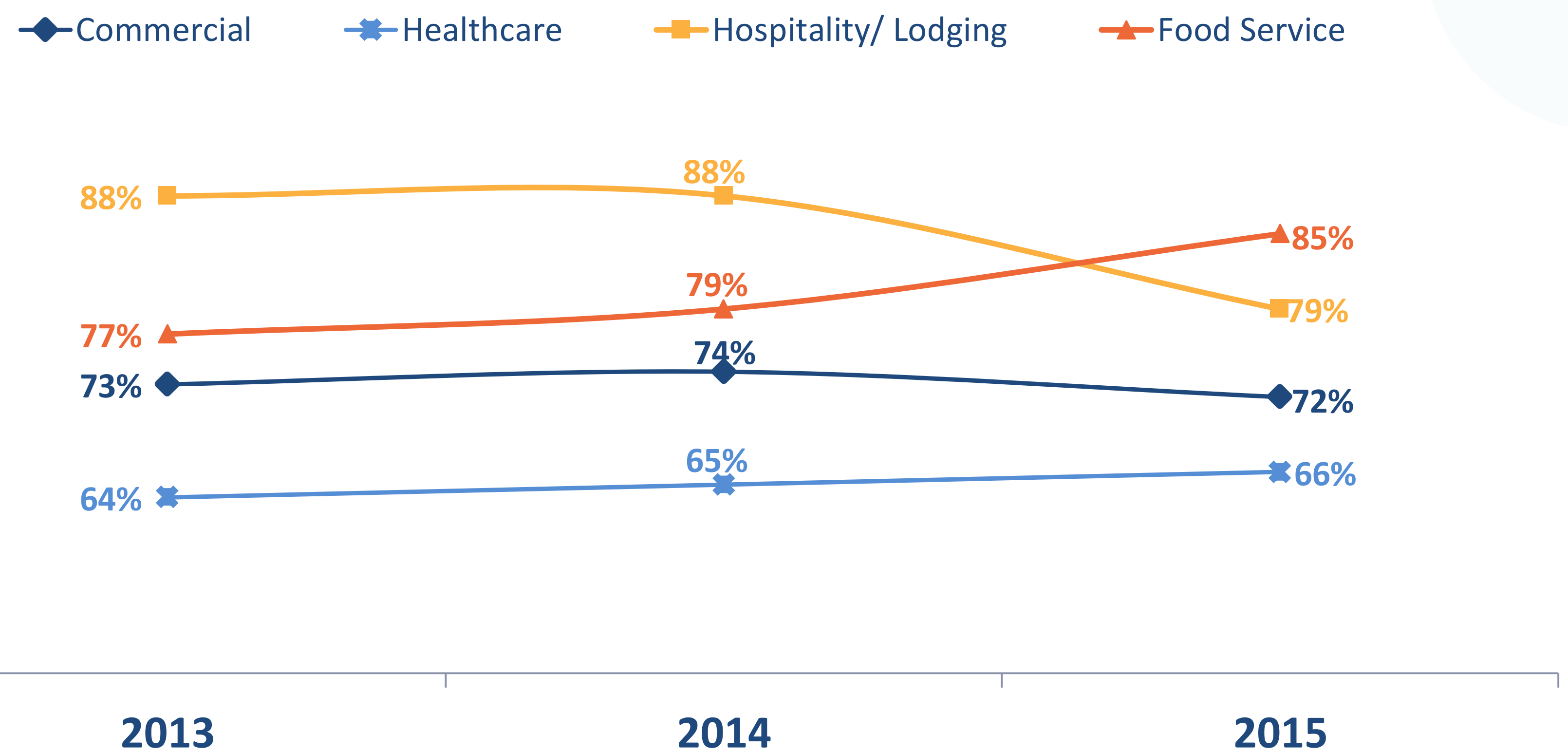
Q24. To what extent do you agree or disagree with the following statements?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: Perceptions of Business Sector

- Those in the food service sector are most likely to expect business to improve within the next twelve months, taking a slight lead (for the first time since 2013) over managers working in hospitality/lodging who say the same. These are also the two segments that are more optimistic about the economy overall.
- On par with previous results, those in the healthcare field are least likely to think business within their sector will improve over the next year, with two thirds from this group in agreement. Commercial sector respondents are slightly more likely to agree here, at 72%, on par with past waves.

I Expect Business within My Sector to Improve within the Next Twelve Months

% Agree

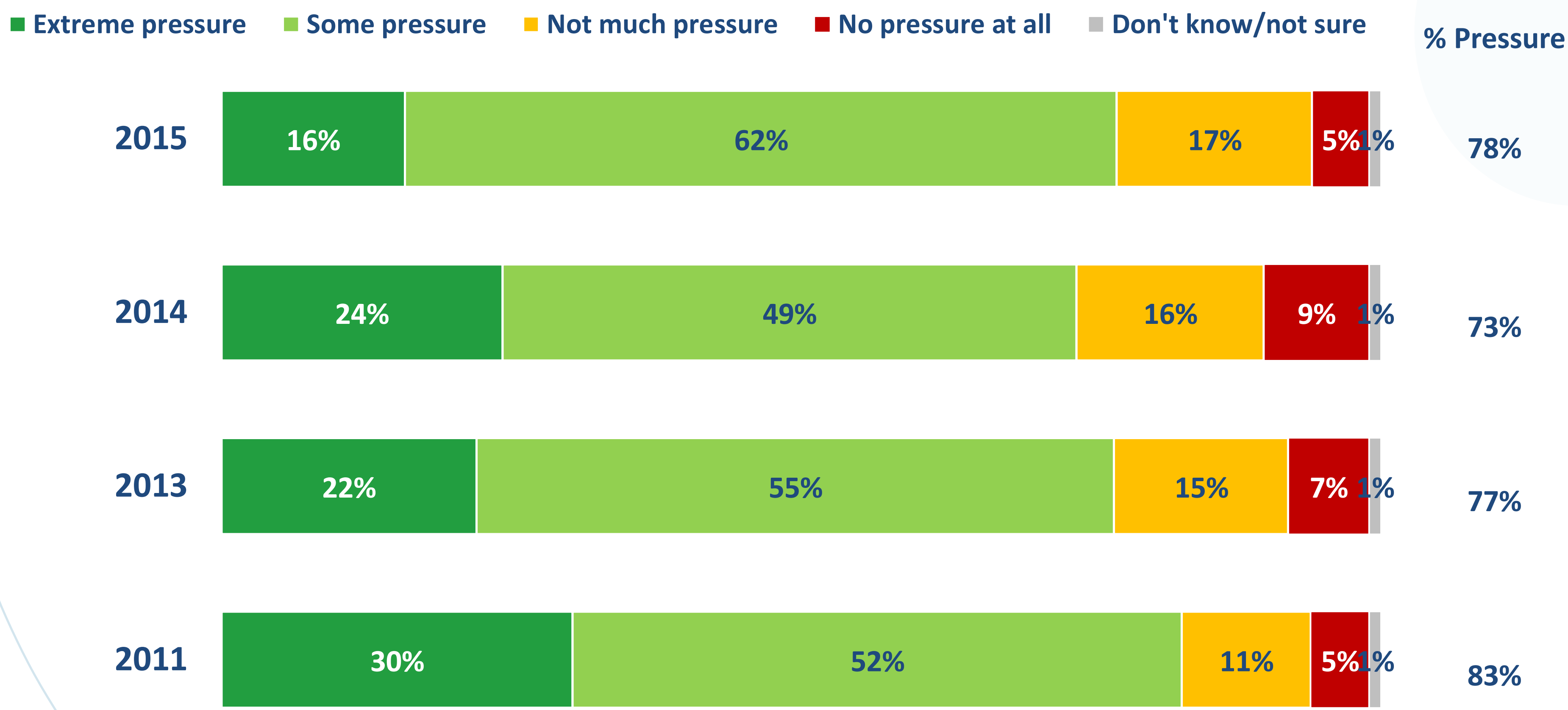


Arrows (↑/↓) denote significant shift vs. last wave.

Q24. To what extent do you agree or disagree with the following statements?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

Pressure to Keep Operating Costs Down

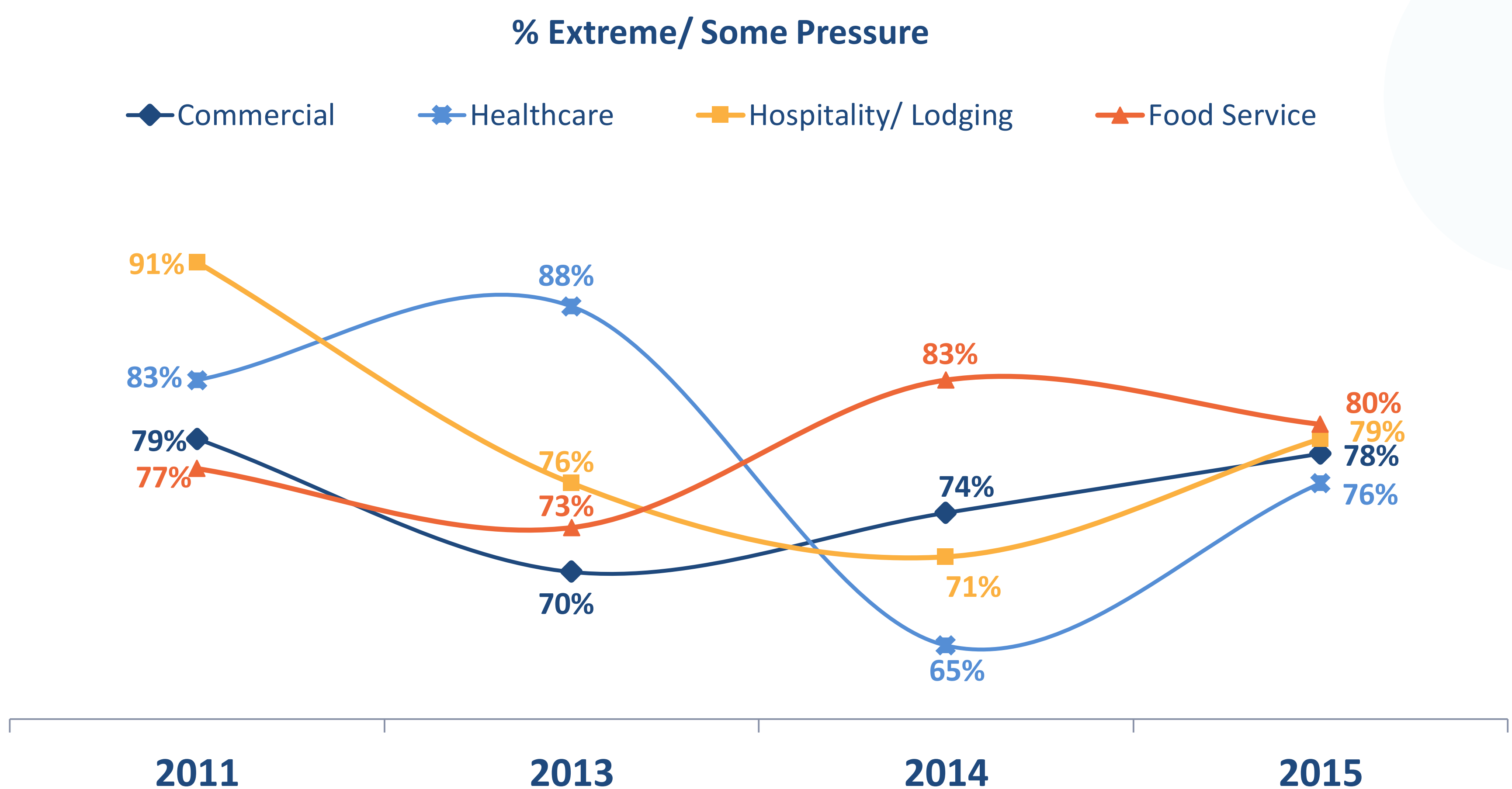
- Nearly eight in ten respondents say that they (or the people they report to) have been under some pressure to keep operating costs down over the last 12 months, including 16% who say that they have been under extreme pressure.
- Slightly less than one in five say instead that they have not felt much pressure, while one in twenty say that they have been under no pressure at all to keep operating costs down.
- The pressure to keep operating costs down is steady from wave to wave, although this wave sees a smaller proportion of those who say they felt 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 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Pressure to Keep Operating Costs Down

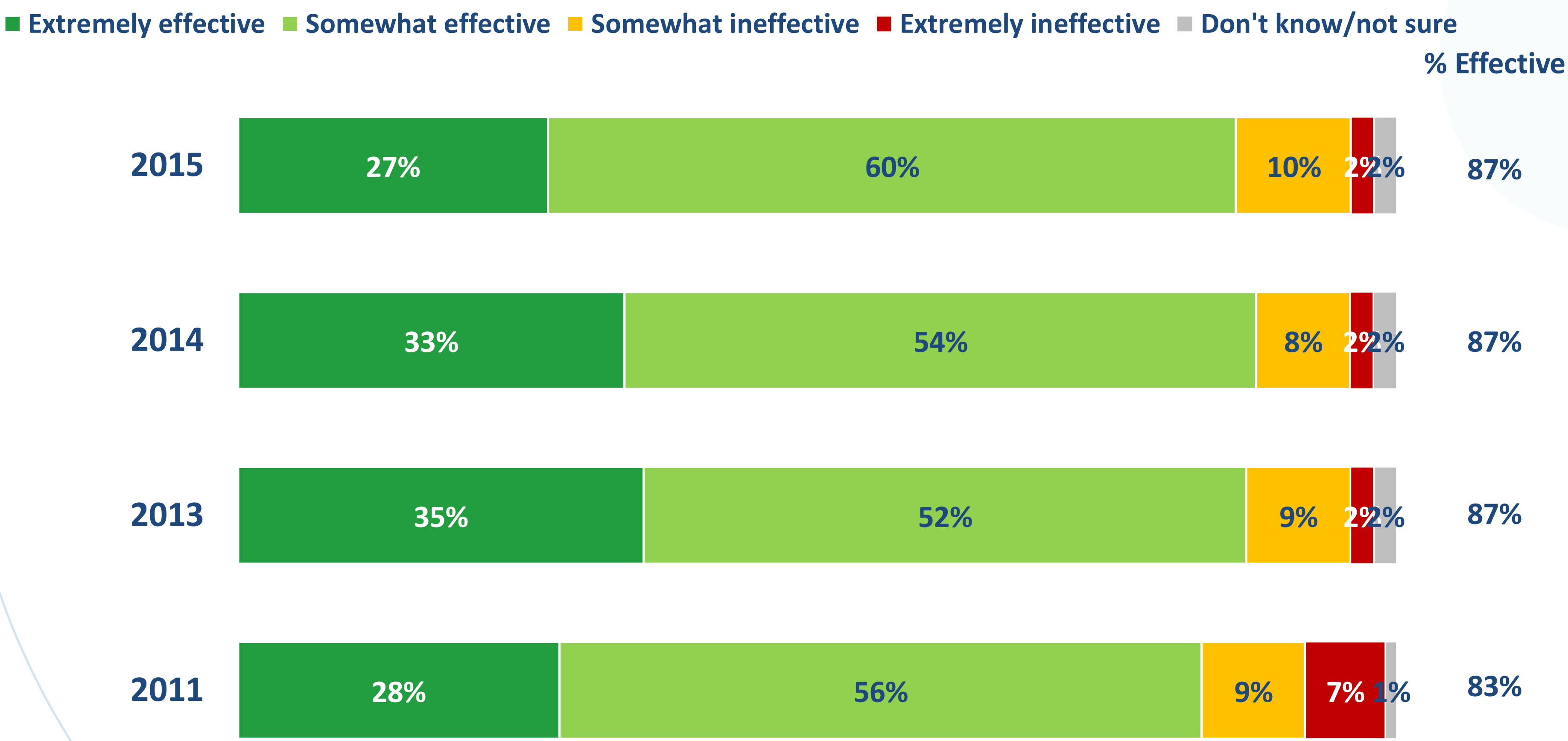
- More than three quarters from each sector say that they have felt either extreme or some pressure to keep operating costs down over the past year, despite greater variations in opinions in past waves.
- While respondents in the food service industry are slightly less likely to feel these pressures compared to 2014, the other sectors all show an increase, particularly in the Healthcare sector (which saw a dramatic decrease last year).



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 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Effectiveness in Keeping Operating Costs Down

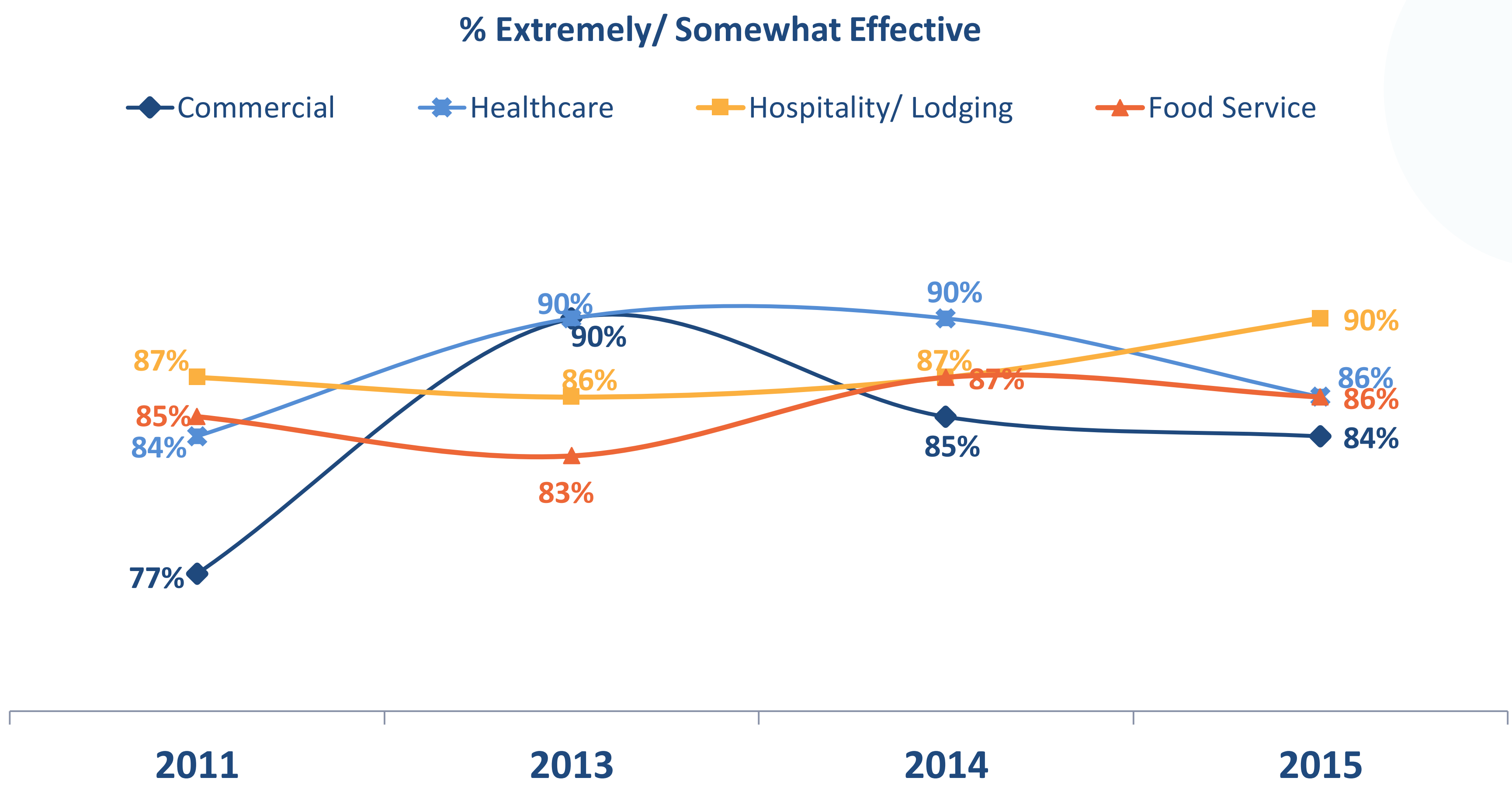
- When it comes to effectiveness in keeping operating costs down, results remain steady with those seen in past waves, with nearly nine in ten saying that their business has been extremely/somewhat effective in this area.
- One in ten, however, feel that their business has been somewhat ineffective over the past year in keeping its operating costs down, although very few (2%) feel that their company has been extremely ineffective.



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 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Effectiveness in Keeping Operating Costs Down

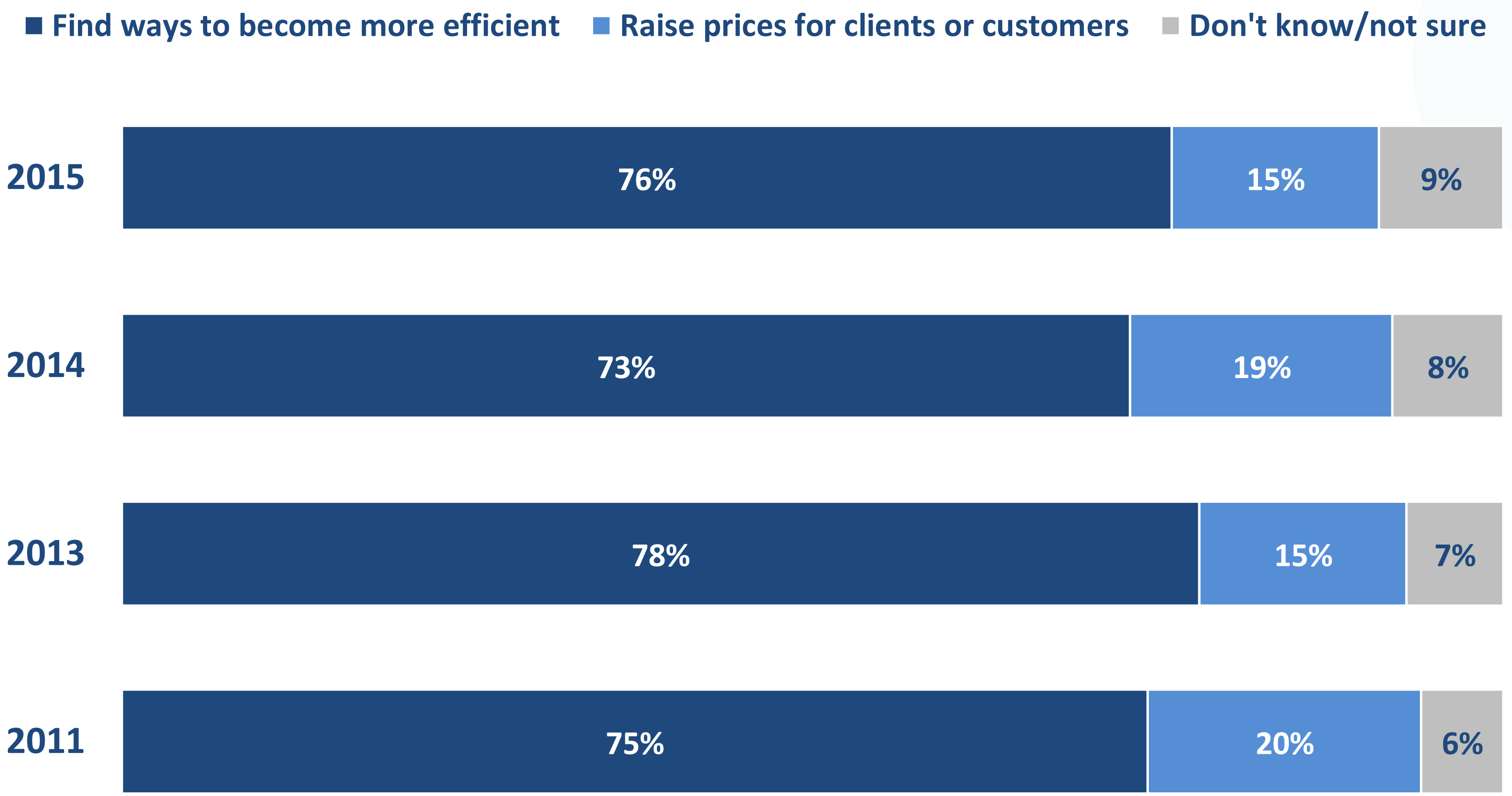
- Compared to last wave, most sectors show a slight drop when it comes to rating their business as having been effective in keeping their operating costs down over the past year, with the exception of the hospitality/lodging industry which sees a slight increase.



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 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Preferred Course of Action to Improve the Bottom Line

- As was the case in previous waves, a majority of cleaning managers in all sectors prefer finding ways to become more efficient when it comes to improving their business' bottom line .
- In comparison, only 15% say that they would instead improve their bottom line by raising prices for clients or customers, while one in ten are unsure.



Q8. Which of the following actions would be preferable for your business to take in order to improve its bottom line?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

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

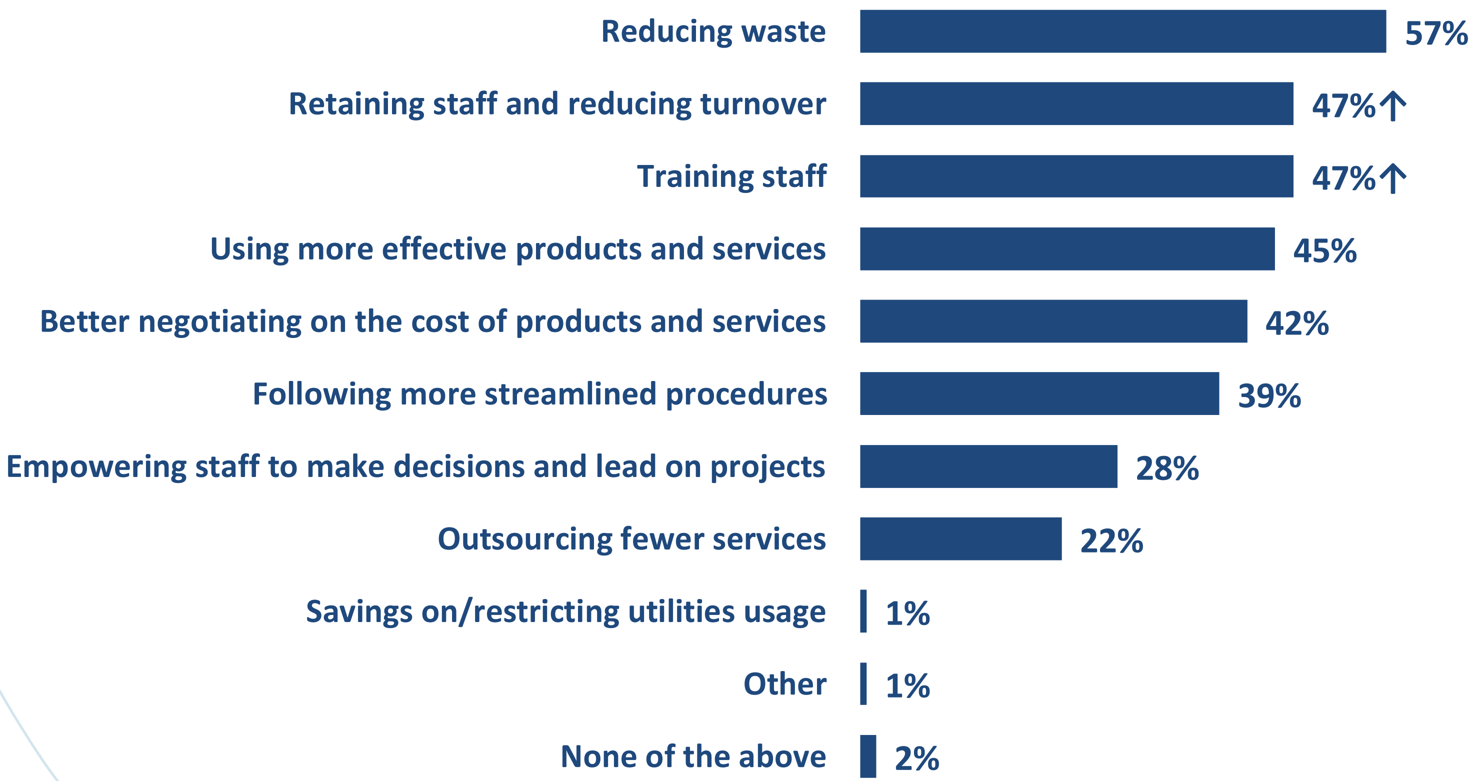
- Roughly three quarters across sectors would prefer to increase efficiency rather than raise their prices, much like previous years. Those in food service and hospitality/lodging show a slightly stronger preference for this approach compared to last year.

	Commercial				Healthcare				Hospitality/Lodging				Food Service			
	2015	2014	2013	2011	2015	2014	2013	2011	2015	2014	2013	2011	2015	2014	2013	2011
Find ways to become more efficient	77%	73%	73%	70%	78%	78%	84%	75%	73%	68%	78%	71%	77%	71%	75%	83%
Raise prices for clients or customers	14%	18%	19%	25%	12%	12%	10%	15%	17%	25%	17%	24%	15%	21%	16%	14%
Not sure	9%	9%	8%	5%	10%	10%	6%	10%	10%	7%	5%	5%	8%	8%	9%	3%

Q8. Which of the following actions would be preferable for your business to take in order to improve its bottom line?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Areas of Increased Efficiency

- Reducing waste continues to be the most common way in which businesses have become more efficient, with a majority of respondents saying that their company has done so in the last 2 years (on par with past years' findings).
- Slightly less than half say that their company has become more efficient in recent years when it comes to retaining staff and reducing turnover, and training staff, more so than in 2014.
- Roughly four in ten also report that their business is more efficient due to using more effective products/services, better negotiating on the cost of products/services, and following more streamlined procedures.
- Empowering staff and less outsourcing are not as likely to be mentioned here, although at least one in five say that their business has become more efficient in these ways, and only 1% say that their business has become more efficient when it comes to utilities.



	2014	2013
Reducing waste	61%	59%
Retaining staff and reducing turnover	35%	41%
Training staff	36%	40%
Using more effective products and services	44%	43%
Better negotiating on the cost of products and services	43%	47%
Following more streamlined procedures	39%	39%
Empowering staff to make decisions and lead on projects	26%	26%
Outsourcing fewer services	23%	24%
Savings on/restricting utilities usage	-	-
Other	1%	1%
None of the above	5%	4%

Arrows (↑/↓) denote significant shift vs. last wave.

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?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: Areas of Increased Efficiency

- Differences exist across sectors when it comes to the areas in which businesses have become more efficient, with reducing waste particularly prevalent in the hospitality/lodging sector, along with retaining staff and reducing turnover and training. On the other hand, staff retention and training are least likely to be mentioned by commercial respondents.
- Commercial respondents, however, are among those most likely to say that their business has become more efficient when it comes to following more streamlined procedures, while respondents in the food service sector are among those most likely to see business efficiency improve when it comes to outsourcing fewer services.
- Many notable differences vs. 2014 are positive, although respondents in the food service sector are now significantly less likely to report that reducing waste is a way in which they have become more efficient

	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Reducing waste	59%	47%↓	63%↑	59%
	-1	-7	+8	-17*
Retaining staff and reducing turnover	30%↓	50%↑	50%↑	57%↑
	+2	+18*	+19*	+9
Training staff	37%↓	51%↑	51%↑	48%
	+14*	+15*	+11	+4
Using more effective products and services	44%	41%	53%	43%
	-3	+4	N/C	+3
Better negotiating on costs of prod. &serv.	44%	39%	43%	43%
	N/C	-4	+3	-1
Following more streamlined procedures	45%↑	41%	29%↓	40%
	+6	+3	-13	+3
Empowering staff	33%	23%	32%	25%
	+8	-6	+7	-3
Outsourcing fewer services	17%	16%↓	25%	28%↑
	N/C	-10	+3	+2
Savings on/restricting utilities usage	1%	-	1%	-
	-	-	-	-

**Asterisks denote notable changes from previous wave //Arrows (↑/↓) denote significant shift among different audiences.*

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?
Base: All Respondents 2015 (n=400); 2014 (n=401)

Cutbacks Due to Economic Climate

- As in past years, respondents continue to cut back most on office supplies and luxuries, followed by more than one in five that say their business has cut back it's employee benefits, profit margins, and use of brand-name products. While results are on par with those seen last wave, respondents are significantly less likely to say that their business has cut back on it's use of brand-name products versus 2014.
- Travel/ travel costs and cut backs in advertisements are new mentions this wave, while the proportion of those who say that their company has not cut back on anything due to the recent economic climate remains constant with both 2014 and 2013.

		2014	2013	2011
Office supplies	42%	47%	38%	50%
Luxuries	32%	35%	33%	45%
Employee benefits	23%	25%	25%	24%
Profit margins	22%	18%	17%	23%
Brand-name products used	21%↓	28%	25%	26%
Staff	16%	17%	24%	29%
Inventory	14%	19%	16%	22%
Travel/ travel costs	1%	-	-	-
Cut backs in advertising	1%	-	-	-
Building costs	9%	7%	9%	14%
My company has not cut back on anything due to…	17%	17%	18%	14%
Other	2%	1%	1%	3%

** Question wording changed slightly since previous waves: Which of the following has your business cut back on due to the **current** economic climate?*

Arrows (↑/↓) denote significant shift vs. last wave.

Q10. Which of the following has your business cut back on due to the recent economic climate?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Cutbacks Due to Economic Climate

- Cutbacks on office supplies and luxuries are most common among the commercial and healthcare fields, while the same can be said of building costs among the latter.
- Those in the food service sector are significantly less likely this wave to say that their business has cut back on inventory vs. 2014.

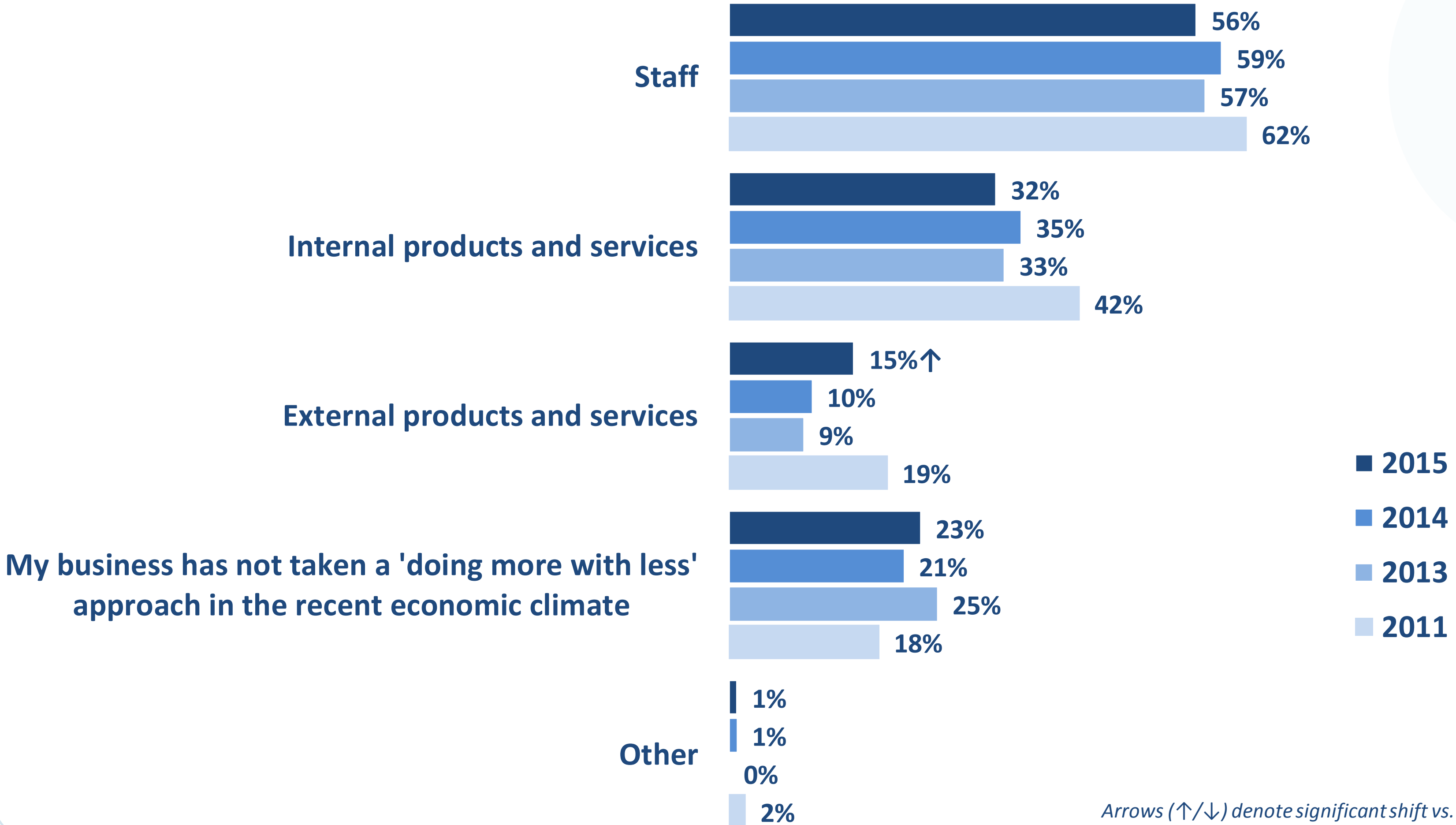
	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Office supplies	44%	46%	43%	33%
	-8	-7	N/C	-6
Luxuries	37%↑	37%↑	24%↓	28%
	-2	-4	-8	+1
Employee benefits	24%	31%	19%	19%
	+9	-3	-6	-8
Profit margins	19%	20%	19%	29%
	-3	-1	+7	+10
Brand-name products used	19%	20%	19%	27%
	-11	-11	-9	+3
Staff	17%	21%	12%	15%
	+5	+5	-7	-5
Inventory	18%	14%	10%	12%
	-9	+5	-8	-12*
Building costs	11%	13%↑	7%	4%↓
	+6	-1	+4	-1
Travel Costs	2%	1%	-	-
	-	-	-	-
Cut backs in advertising	1%	-	-	1%
	-	-	-	-
My company has not cut back on anything due to the economic climate	17%	11%	19%	19%
	+4	-2	-5	+2

*Asterisks denote notable changes from previous wave //Arrows (↑/↓) denote significant shift among different audiences.

Q10. Which of the following has your business cut back on due to the recent economic climate?
Base: All Respondents 2015 (n=400); 2014 (n=401)

"Doing More with Less" due to Economic Climate

- A majority of respondents this wave once again say that their company is taking a 'doing more with less' approach when it comes to staffing, while roughly one third say the same about internal products and services.
- In contrast, only 15% say that their company is doing more with less when it comes to external products and services (though this marks an increase from 2014), while roughly a quarter say that their business has not taken any 'doing more with less' actions in light of the recent economic climate.



Arrows (↑/↓) denote significant shift vs. last wave.

** Question wording changed slightly since previous waves: Which of the following has your business cut back on due to the **current** economic climate?*

Q11. Due to the recent economic climate, in which of the following areas, if any, do you feel your business took a 'doing more with less' approach?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

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

- Six in ten respondents in both the healthcare and food service sectors report that they are "doing more with less" when it comes staff, the latter marked by a significant decrease since 2014. Despite this decrease, staffing nevertheless remains the most common place where food service professionals are taking a "doing more for less" approach, as is the case for those in all other audiences.

	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Staff	50%	62%	53%	60%
	+6	+5	-6	-15*
Internal products and services	32%	34%	36%	27%
	-4	-3	-1	-2
External products and services	18%	15%	13%	12%
	+1	+9	+8	+1
My business has not taken a 'doing more with less' approach in the recent economic climate	28%	19%	20%	25%
	-1	-3	-1	+11

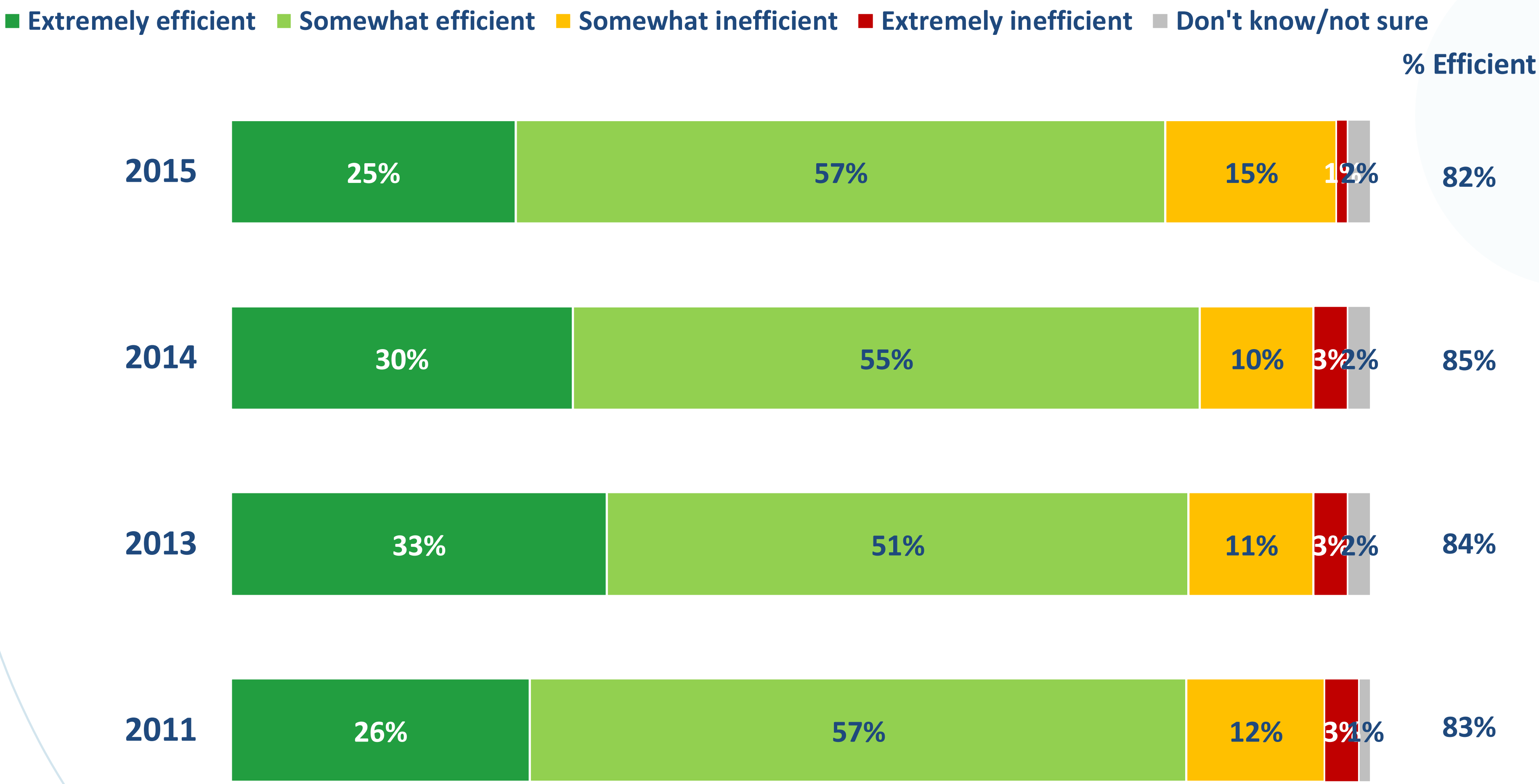
**Asterisks denote notable changes from previous wave*

** Question wording changed slightly since previous waves: Which of the following has your business cut back on due to the **current** economic climate?*

Q11. Due to the recent economic climate, in which of the following areas, if any, do you feel your business took a 'doing more with less' approach?
Base: All Respondents 2015 (n=400); 2014 (n=401)

Efficiency of Cleaning Operations

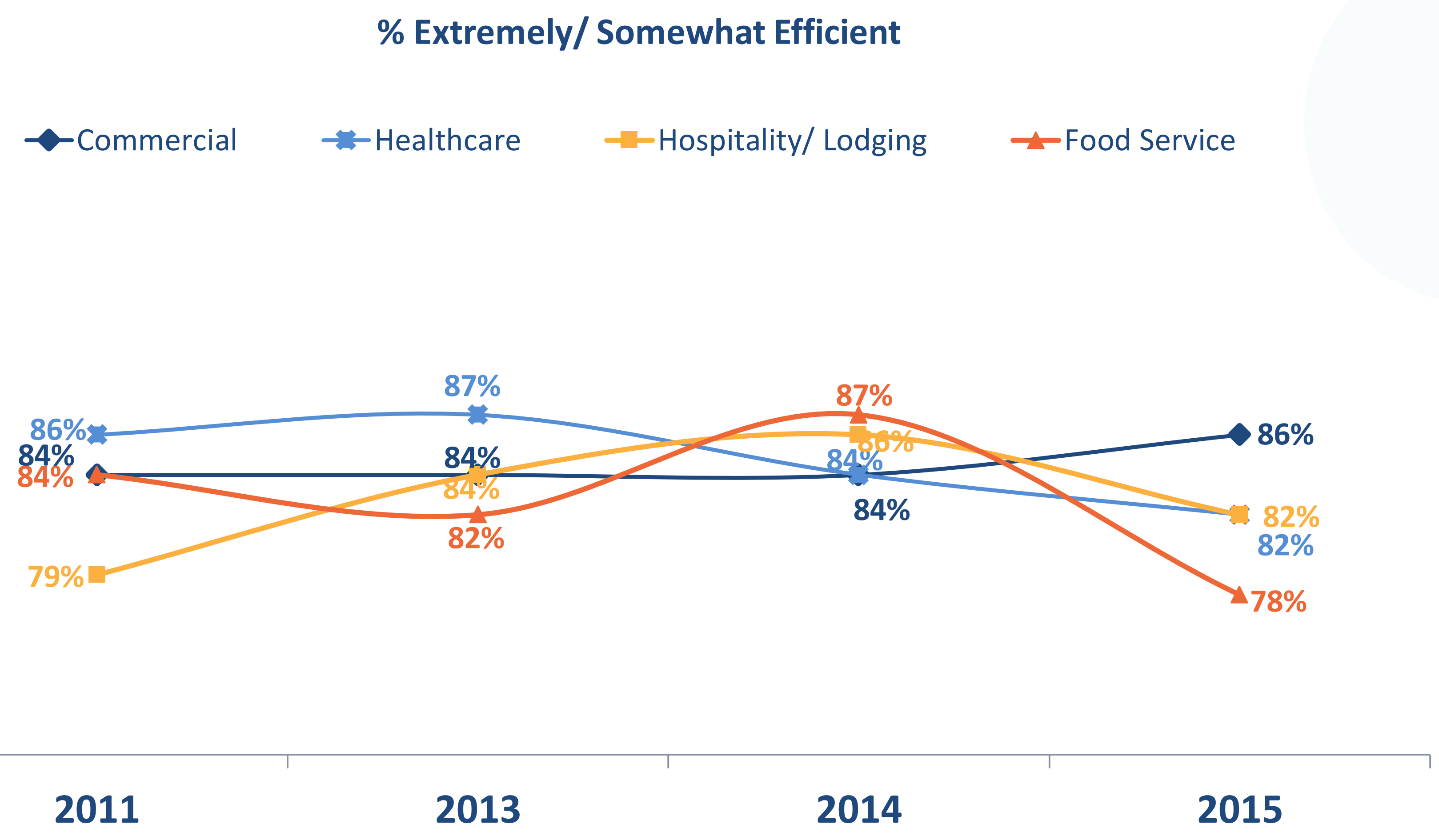
- Thinking exclusively about cleaning operations, slightly more than eight in ten respondents overall rate their business as having been efficient in the last twelve months, including a quarter who say their company has been *extremely* efficient.
- In contrast, few say that their company has been inefficient when it comes to cleaning operations – on par with previous waves.



Q7. Thinking exclusively about cleaning operations, how efficient or inefficient has your business been in the last 12 months?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Efficiency of Cleaning Operations

- At least three quarters of respondents across sectors say that their cleaning operations have operated efficiently over the past year, with those in the commercial sector being most likely to say so.
- Those in food service are least likely to feel this way – down nearly ten points compared to 2014.



Q7. Thinking exclusively about cleaning operations, how efficient or inefficient has your business been in the last 12 months?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Business Focus and Concerns

Detailed Findings

Preferred Areas of Focus

- For the fourth consecutive wave, keeping customers satisfied is most likely to be seen as being important to their businesses right now – selected by just over a third of respondents. One in five say that growing the business is what is most important to their company right now, while slightly smaller proportions mention either making a profit or being as efficient as possible with current resources as being top priorities for their business right now.
- While one in ten believe cost savings are most important to their business, staff retention is even less likely to be seen as a business priority.

**Question wording changed slightly since 2011 wave: Keeping all staff members employed*

Q9. Which of the following do you feel is most important to your business right now?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Preferred Areas of Focus

- When it comes to business priorities, 'keeping customers satisfied' is most important for respondents in all sectors, but particularly those in the hospitality/ lodging sector. While keeping customers satisfied is also a top priority among healthcare staff (24%), growing the business is nearly as important to this audience (21%).
- Both commercial and healthcare sector respondents (20% each) place more emphasis on being as efficient as possible with current resources, especially when compared to hospitality/ lodging workers (9%).
- Respondents from all four sectors are on par when it comes to prioritizing growing the business, making a profit, cost savings, and staff retention.

	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Keeping customers satisfied	28%↓	24%↓	49%↑	34%↓
	-4	-5	+3	-3
Growing the business	20%	21%	19%	23%
	N/C	+7	+6	-1
Making a profit	21%	16%	11%	16%
	N/C	N/C	-8	N/C
Being as efficient as possible with our current resources	20%↑	20%↑	9%↓	12%
	+4	-8	-2	+4
Cost savings	7%	13%	10%	11%
	-2	+5	+2	+1
Staff retention	4%	6%	2%	4%
	+2	N/C	-1	-1

Q9. Which of the following do you feel is most important to your business right now?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Concerns about Business in General

- Customer dissatisfaction now takes the lead when it comes to being the most common cause of worry, coming in slightly ahead of worries caused by reduction in business caused by economic downturn (which ranked at the top for the past two years).
- Low staff moral and high staff turnover are causes of worry for roughly a quarter respondents – the latter up significantly since 2014. Slightly smaller proportions say the same of competitors doing a better job and budgetary cuts.
- Negative publicity, falling behind, and job cuts/layoffs are not as common, although at least one in ten still worry about these when thinking about their business in general, while very few worry about insurance/healthcare benefits or have some other concern.

		2014	2013
Customer dissatisfaction	41%	38%	38%
Reduction in business caused by economic downturn	38%	43%	44%
Low staff morale and engagement	25%	23%	23%
High staff turnover	24%↑	17%	15%
Competitors doing a better job	22%	23%	16%
Budgetary cuts	18%	16%	22%
Negative publicity	16%	15%	14%
Falling behind in terms of industry advancements and…	15%	12%	12%
Job cuts / Layoffs	10%	12%	15%
Concern over insurance and healthcare benefits	1%		
Other	1%	1%	2%
None of these	6%	8%	8%

Arrows (↑/↓) denote significant shift vs. last wave.

Q25. Thinking about your business in general, which of the following, if any, causes you to worry?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: Concerns about Business in General

- Customer dissatisfaction is the top concern among those in hospitality and food service, with a notable increase since 2014 among food service respondents.
- Reduction in business caused by economic downturn is the top worry among those in the commercial and healthcare sectors. These audiences, while less likely to express concern about customer dissatisfaction, are more likely than those in the other sectors to worry about budgetary cuts. Concerns about competitors outperforming them are also more prevalent in the commercial sector, along with those working in food service.

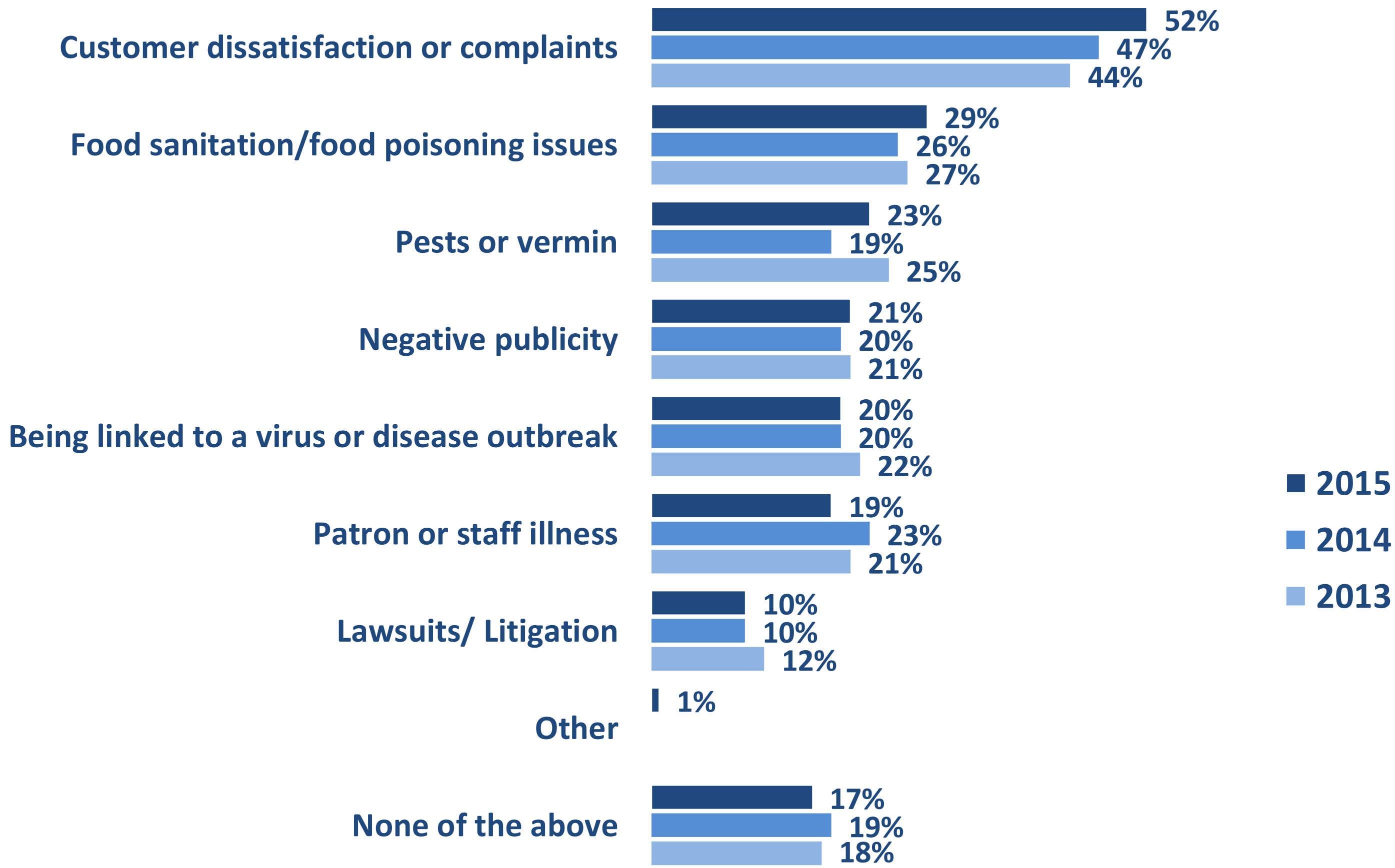
	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Customer dissatisfaction	32%↓	26%↓	48%↑	59%↑
	+7	-5	-3	+15*
Reduction in business caused by economic downturn	45%	35%	33%	39%
	-10	-1	-5	-5
Low staff morale and engagement	24%	31%	21%	25%
	+5	+5	+1	-1
High staff turnover	18%	22%	29%	28%
	+9	+3	+15*	+2
Competitors doing a better job	25%↑	11%↓	21%	30%↑
	-2	N/C	-10	+8
Budgetary cuts	22%↑	28%↑	11%↓	10%↓
	+6	N/C	+2	N/C
Negative publicity	9%↓	16%	20%↑	18%
	-2	+3	N/C	+8
Falling behind in terms of industry advancements and innovation	15%	17%	14%	14%
	+1	+5	+1	+4
Job cuts / Layoffs	14%	11%	6%	8%
	+2	-2	-7	-2
Concern over insurance and healthcare benefits	-↓	4%↑	1%	-↓
	-	-	-	-

Asterisks denote notable changes from previous wave

Q25. Thinking about your business in general, which of the following, if any, causes you to worry?
Base: All Respondents 2015 (n=400); 2014 (n=401)

Concerns about Cleaning as it Relates to Business

- When it comes to specific concerns about cleaning or disinfection as it relates to their business, customer dissatisfaction continues to be most worrisome, selected by over half of all respondents.
- Nearly three in ten worry about food sanitation/food poisoning issues, while roughly one in five worry about pests or vermin, negative publicity, being linked to virus/ disease, and patron or staff illness when it comes to cleaning or disinfection specifically.
- Lawsuits/ litigation are a cause of worry for roughly one in ten, while very few mention some other concern. Furthermore, nearly one in five say that none of these causes them to worry when thinking about cleaning or disinfection as it relates to their business.



Arrows (↑/↓) denote significant shift vs. last wave.

Q26. Please think specifically about cleaning or disinfection as it relates to your business. Which of the following, if any, causes you to worry?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

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

- Respondents working within the commercial sector, along with those in the healthcare sector, are among those least likely to worry about customer dissatisfaction, food sanitation, pests/vermin, and negative publicity - while these sources of worry are more common among hospitality/lodging and food service sector professionals.
- Patron or staff illnesses and lawsuits are especially troubling for those working in the healthcare sector.
- Compared to 2014 results, food service sector respondents express greater concern about customer dissatisfaction and pest/vermin, but are less likely to be worried about patron or staff illness.

	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Customer dissatisfaction or complaints	39%↓	52%	59%↑	58%↑
	N/C	+3	-2	+19*
Food sanitation/food poisoning issues	14%↓	9%↓	29%↑	62%↑
	-2	+2	+2	+7
Pests or vermin	15%↓	15%↓	23%↓	37%↑
	-4	+5	-3	+14*
Negative publicity	14%↓	20%	26%↑	25%
	+2	+2	-8	+10
Being linked to a virus or disease outbreak	16%	26%	19%	20%
	-2	-1	+6	-3
Patron or staff illness	19%	26%↑	14%↓	16%
	-3	-4	+1	-12*
Lawsuits/ Litigation	6%↓	15%↑	10%	7%
	-1	+3	+5	-10

**Asterisks denote notable changes from previous wave //Arrows (↑/↓) denote significant shift among different audiences.*

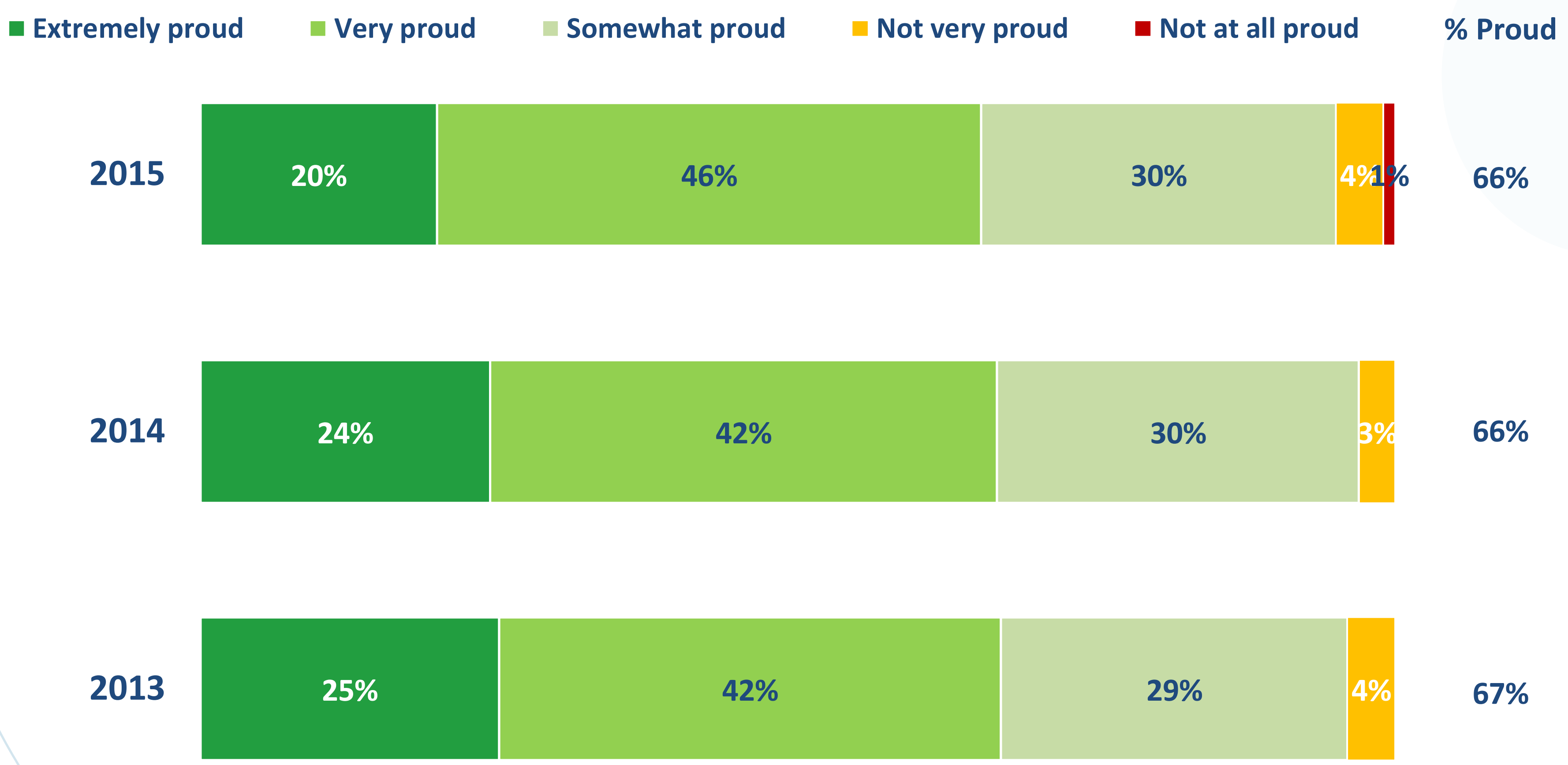
Q26. Please think specifically about cleaning or disinfection as it relates to your business. Which of the following, if any, causes you to worry?
Base: All Respondents 2015 (n=400); 2014 (n=401)

Cleaning Operations

Detailed Findings

Degree of Pride in Business' Cleanliness, Hygiene, and Cleaning Products

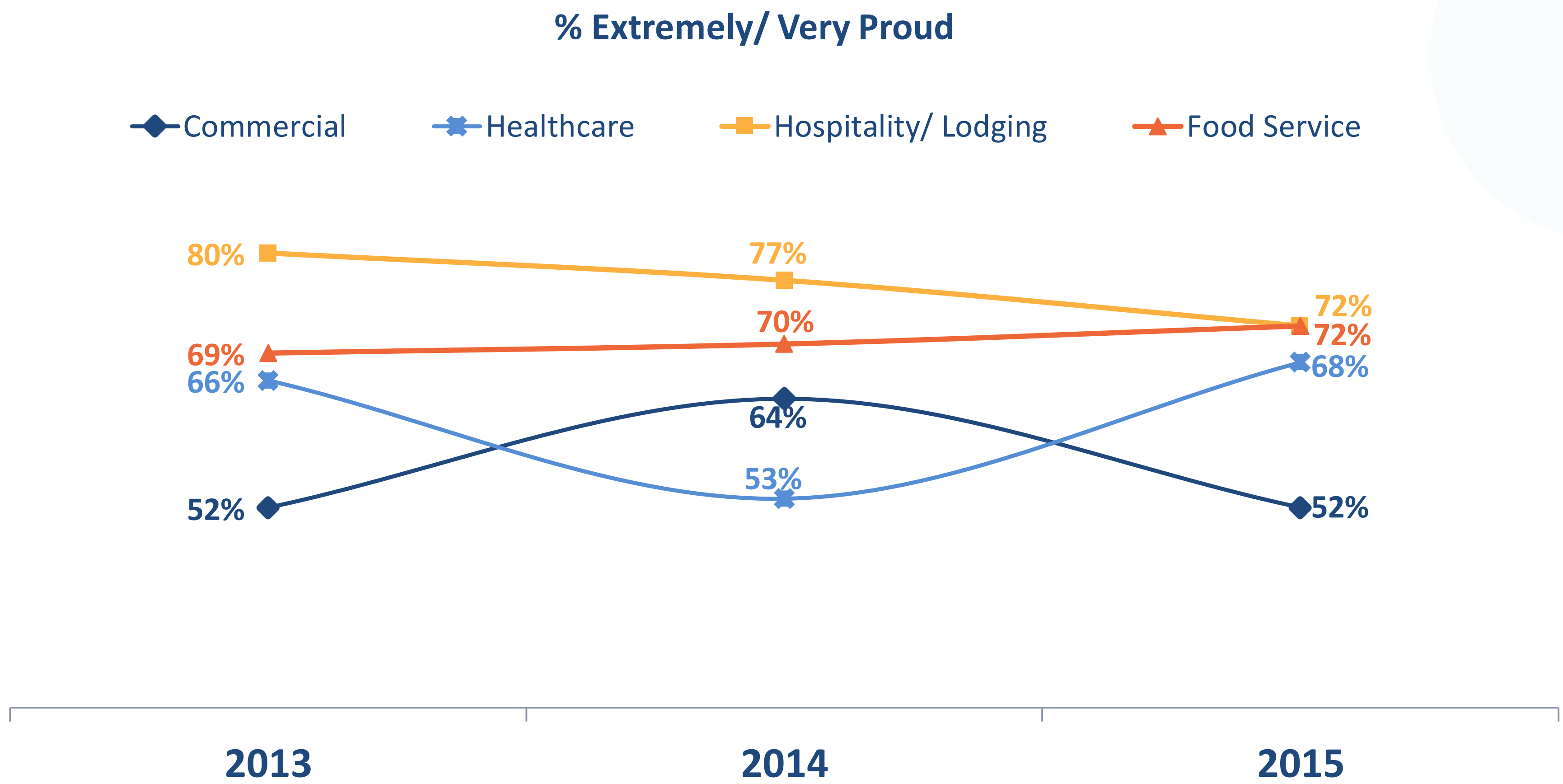
- On par with results from previous years, two thirds of respondents overall say that they are extremely/very proud of their business' cleanliness, hygiene, and cleaning procedures, with another three in ten that say that they are somewhat proud.
- Only one in twenty say that they are either not very/not at all proud of their business's cleanliness, hygiene, and cleaning procedures.



Q27. Overall, how proud are you of your business's cleanliness, hygiene and cleaning procedures?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

Tracking Results by Sector: Degree of Pride in Business' Cleanliness, Hygiene, and Cleaning Products

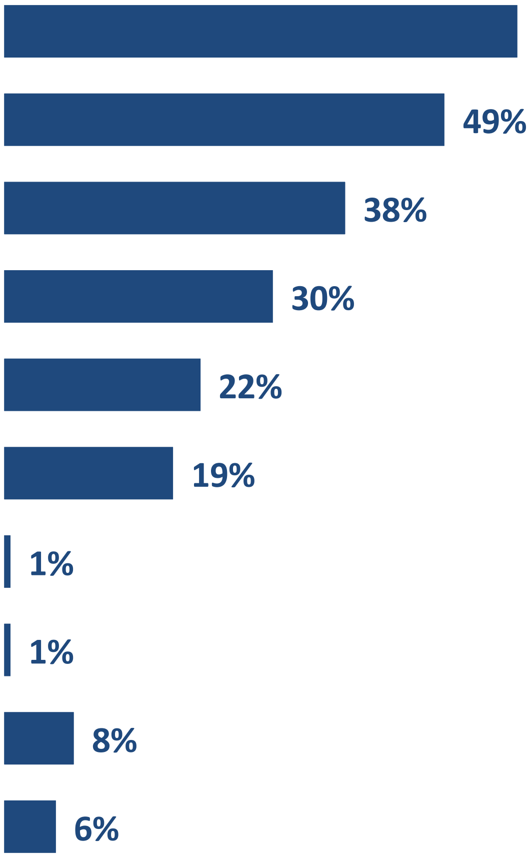
- While in 2014 it was those in the healthcare sector who were least likely to say that they felt proud of their business' cleanliness, hygiene, and cleaning procedures – this wave, it is commercial respondents that are least likely to say that they feel proud, marking a 12-point drop.
- Both hospitality/lodging and food service sector respondents are most likely to say that they are extremely/very proud of their business in this respect, followed closely by those in healthcare – a sector that shows a notable increase vs. last year.



Q27. Overall, how proud are you of your business's cleanliness, hygiene and cleaning procedures?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

Challenges to Managing a Cleaning Staff

- Quality of work continues to be the most common challenge with managing a cleaning staff, selected by a majority of respondents overall, while having a staff that lacks interest/motivation/dedication follows closely behind.
- Employee turnover and training issues are top challenges for at least three in ten respondents, while one in five mention limited resources and language differences as being some of the challenges they experience when managing a cleaning staff today.
- Pay compensation and other issues are not as relevant, while nearly one in ten say that none of these are challenges, and similar proportions are not sure. Furthermore, no significant differences exist when compared to the previous wave.



		2014	2013	2011
Quality of work	57%	55%	60%	60%
Lack of interest/motivation/dedication	49%	45%	53%	54%
Employee turnover	38%	34%	36%	36%
Training	30%	29%	30%	25%
Limited resources (i.e., cleaning products and/or staff)	22%	20%	15%	21%
Language differences	19%	18%	22%	25%
Pay/ compensation	1%	-	-	-
Other	1%	1%	1%	2%
None of the above	8%	10%	7%	8%
Don't know/not sure	6%	8%	7%	5%

Arrows (↑/↓) denote significant shift vs. last wave.

Q12. Based on your experience, what are the top three (3) challenges with managing a cleaning staff today?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Top Challenges

- Respondents across sectors tend to face similar challenges when it comes to the management of cleaning staff today, although lack of interest/motivation/dedication is most prominent among those in food service.
- In the healthcare sector, there have been some shifts when it comes to their top challenges, with employee turnover and training challenges up significantly compared to last year.

	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Quality of work	48%	61%	59%	59%
	-8	+10	+4	N/A
Lack of interest/motivation/dedication	43%↓	47%↓	43%↓	62%↑
	+1	+10	-7	+11
Employee turnover	31%	39%	42%	38%
	-1	+12*	N/A	+2
Training	25%	31%	34%	28%
	N/A	+12*	-1	-10
Limited resources	25%	21%	24%	18%
	+9	-8	+3	+4
Language differences	21%	17%	25%	14%
	+3	+1	+3	-2
Pay/ compensation	-	-	1%	1%
	-	-	-	-

**Asterisks denote notable changes from previous wave //Arrows (↑/↓) denote significant shift among different audiences.*

Q12. Based on your experience, what are the top three (3) challenges with managing a cleaning staff today?
Base: All Respondents 2015 (n=400); 2014 (n=401)

Obstacles to Cleaning Department Running as Smoothly as Possible

- Even more so than in 2014, staff effort and attitude is the most common issue preventing their business' cleaning departments from running as smoothly as possible. Three in ten say the same thing about training, also an increase vs. last year.
- Budget cuts/limited resources/being understaffed are all seen as being obstacles for roughly a quarter, while other obstacles such as experiencing confusion and purchasing too much product are preventing the cleaning departments of roughly one in ten managers from running as smoothly as possible.
- One in four say that there are no operation inefficiencies relating to their business.

Arrows (↑/↓) denote significant shift vs. last wave.

Q21. Which of the following, if any, prevents your business' cleaning department from running as smoothly as possible?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sectors: Barriers to Cleaning Department Running as Smoothly as Possible

- Few differences exist across sectors when it comes to barriers that prevent cleaning departments from running as smoothly as possible, although those in food service and healthcare are significantly more likely than those in the commercial and hospitality sectors to mention experiencing issues with staff effort/attitudes. In fact, for food service respondents, 57% marks a significant increase since last wave.
- Food service respondents are also significantly more likely to mention training obstacles compared to results seen in 2014, while concerns around budget cuts/limited resources/understaffing fall significantly among hospitality/lodging professionals.
- Commercial sector respondents, and to a lesser extent healthcare respondents, are among those most likely to say that there are no operational inefficiencies preventing their business' cleaning departments from running as smoothly as possible.

	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Staff effort & attitude - unhappy or unmotivated employees	32%↓	46%↑	40%↓	57%↑
	-3	+9	+11	+12*
Training	25%	27%	32%	33%
	+9	+8	+9	+12*
Budget cuts/limited resources/understaffed	30%	24%	20%	26%
	+8	-6	-13*	+3
Confusion, difficulty remembering what products do	11%	7%	15%	15%
	+11	-3	-1	+6
Product purchasing	9%	8%	11%	6%
	-5	-1	+5	-4
There are no operational inefficiencies relating to my business's cleaning efforts	28%↑	26%	21%	16%↓
	-2	-1	-5	-10

**Asterisks denote notable changes from previous wave //Arrows (↑/↓) denote significant shift among different audiences.*

Q21. Which of the following, if any, prevents your business' cleaning department from running as smoothly as possible?
Base: All Respondents 2015 (n=400); 2014 (n=401)

Biggest Challenge to Effective Cleaning-Related Training

- When it comes to cleaning-related training, roughly one in five say that the biggest challenge is work productivity or the cost of training; on par with results seen last wave.
- About one in ten each mention language differences or the availability of either qualified training leaders, or again quality training programs, as being the biggest obstacle to providing effective cleaning-related training – the latter significantly more likely to be cited as a obstacle to effective cleaning-related training compared to 2014.
- Access to materials, maintaining a good attitude/ interest towards a job, and other mentions are not as common.
- One in six report that none of these are challenges when it comes to effective cleaning-related training.

	2014	2013	2011
Loss of work productivity	20%	20%	18%
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…	3%	5%	
Maintaining good attitude/ interest in job			
Other	2%	2%	3%
None of the above	16%	16%	13%
Don't know/not sure	13%	13%	11%

Arrows (↑/↓) denote significant shift vs. last wave.

Q13. Based on your experience, which of the following is the biggest challenge/obstacle to effective cleaning-related training?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

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

- Once again here, not many differences exist across sectors when it comes to obstacles to effective cleaning-related training, although healthcare respondents are significantly more likely than those in the commercial sector to mention loss of work productivity as being the biggest challenge.
- Further, there have been no significant shifts compared to 2014.

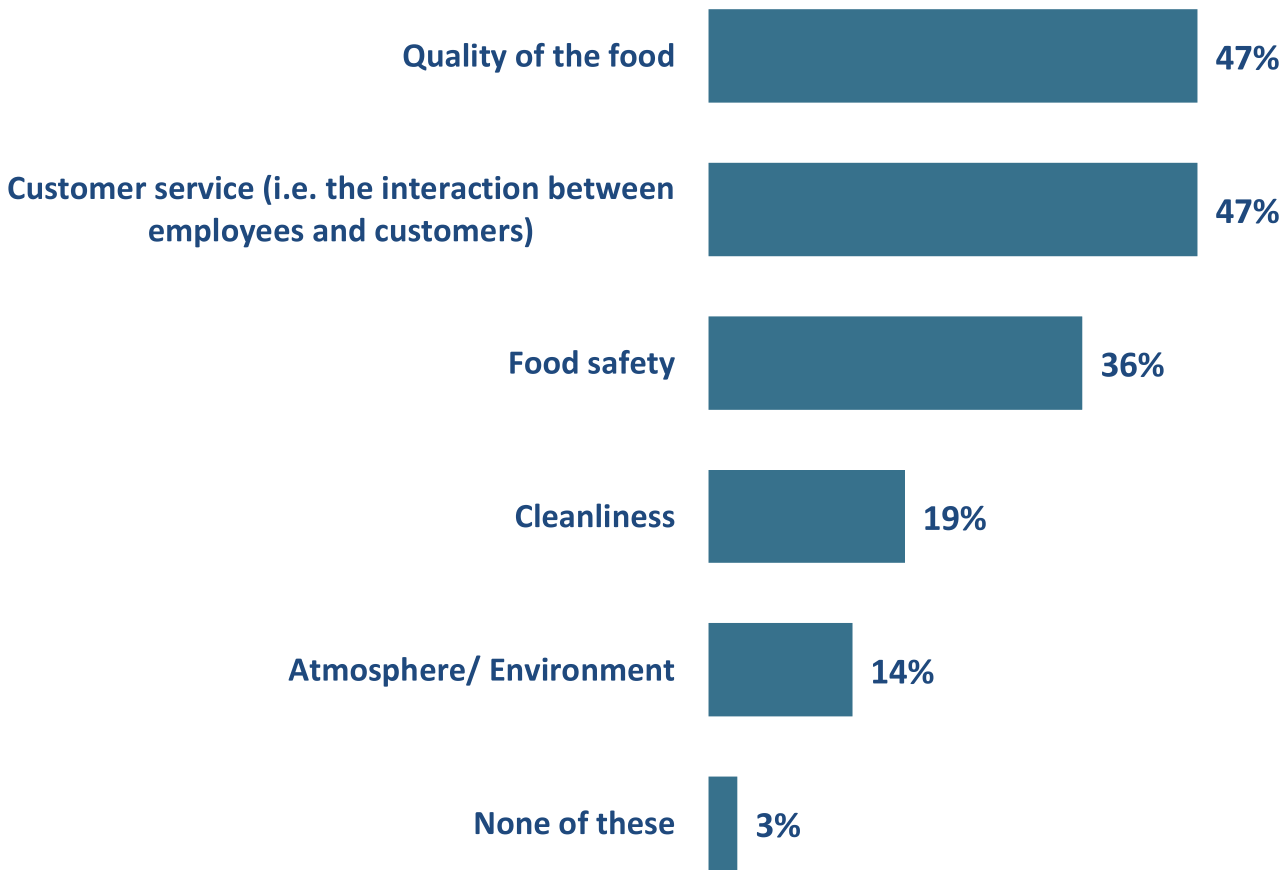
	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Loss of work productivity	13%↓	25%↑	21%	19%
	-4	+5	-3	-1
Cost of training	18%	10%	16%	18%
	+4	-1	-2	-1
Language differences	16%	12%	11%	10%
	+7	-4	-4	-4
Availability of qualified training leaders	9%	12%	9%	14%
	-5	-2	-1	+6
Availability of quality training programs	12%	10%	9%	6%
	+3	+7	+7	+1
Access to relevant and/or up-to-date training materials	5%	6%	5%	5%
	+1	+2	+3	+2
Maintaining good attitude/ interest in job	-	-	-	2%
	-	-	-	-

**Asterisks denote notable changes from previous wave //Arrows (↑/↓) denote significant shift among different audiences.*

Q13. Based on your experience, which of the following is the biggest challenge/obstacle to effective cleaning-related training?
Base: All Respondents 2015 (n=400); 2014 (n=401)

Areas of Concern When it Comes to Best Serving Customers: Food Service Sector

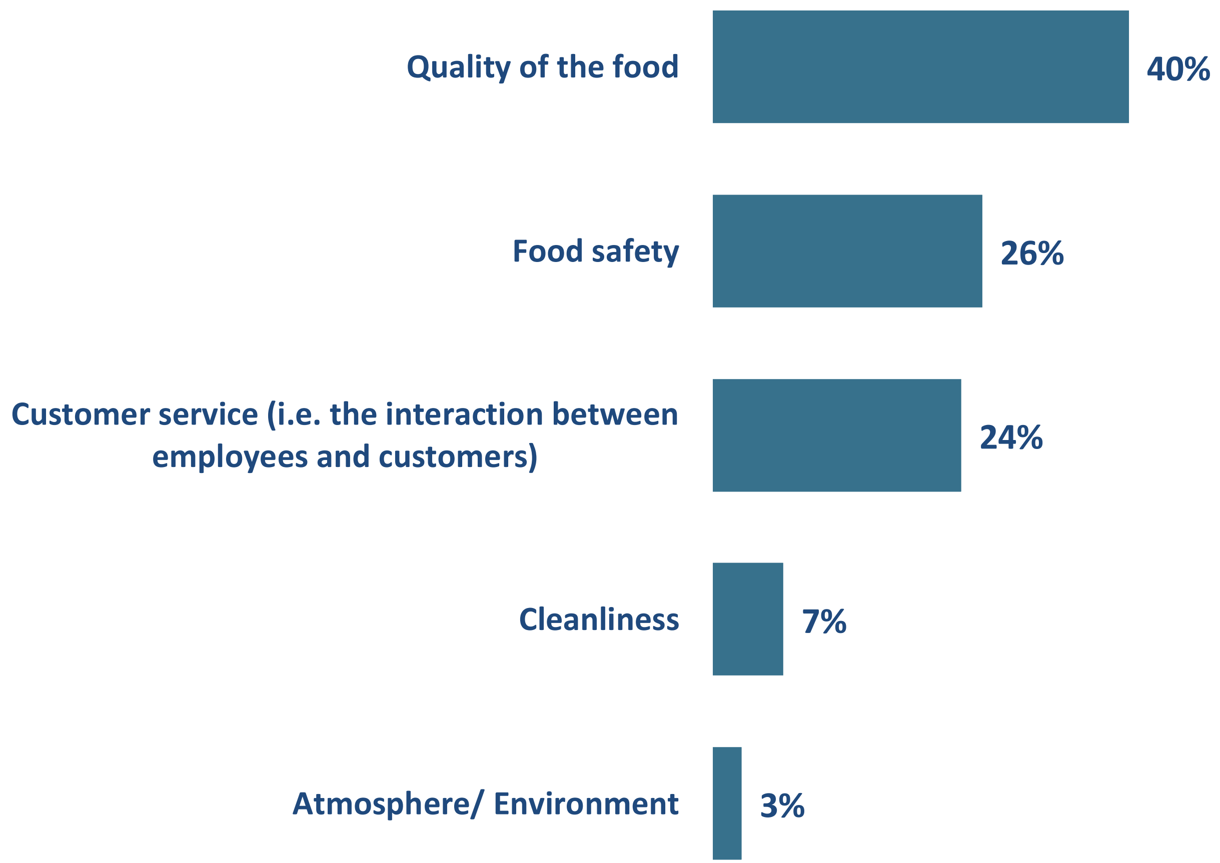
- Among respondents in the food service sector, quality of the food and customer service are top ranked concerns when it comes to best serving customers, selected by nearly half.
- For over a third, food safety is also a major concern when it comes to best serving customers, while one in five worry about cleanliness.
- The atmosphere/environment least likely to be cause for concern when it comes to serving their customers.



Q31. Which of the following concerns you most about your business when it comes to best serving your customers?
Base: Food service segment only (n=100)

Food Service Areas Perceived to be Most Important to Customers – Rank #1

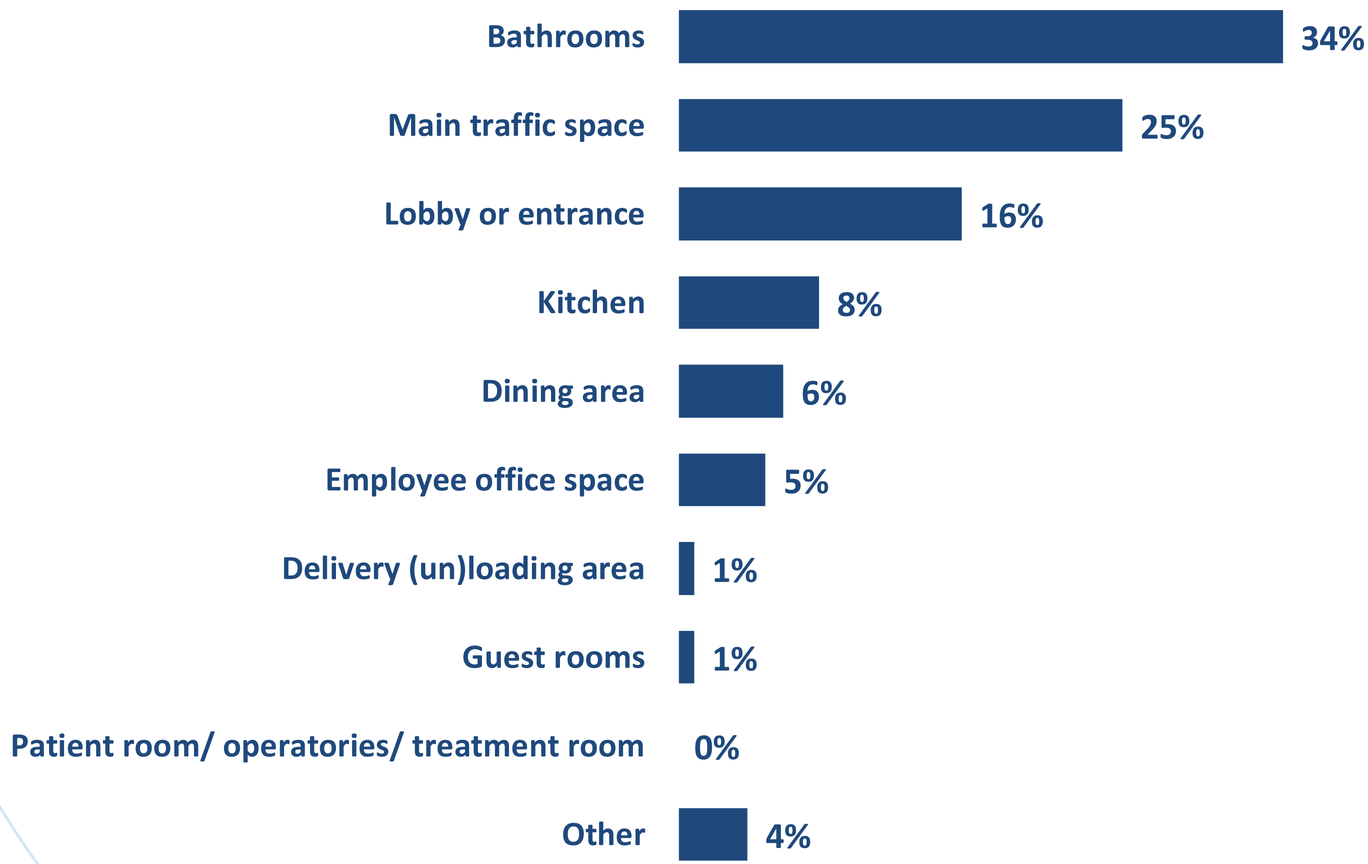
- Now looking at what food service managers believe to be most important to customers when it comes to food service, quality of the food takes the lead, with two in five perceiving this to be the most important priority for their customers.
- Roughly a quarter of respondents select food safety and customer service as being the most important to customers when it comes to food service, while cleanliness and the atmosphere/environment are far less likely to be seen as a top priority for their customers.



Q32. And how do you think your customers would prioritize each of the following in terms of importance when it comes to food service? Please rank them in terms of how important each is to your customers.
Base: Food service segment only (n=100)

Areas Where Cleanliness is Perceived to be Most Important to Customers

- When it comes to cleaning managers’ perceptions about which areas are most important to be kept clean in the eyes of their customers, bathrooms continue to rank first, followed by main traffic spaces and the lobby/entrance.
- In contrast, cleanliness in the kitchen, the dining area, and employee office space is seen as being most important to customers by less than one in ten respondents, while very few managers think that customers concern themselves most with the cleanliness of delivery loading/unloading areas, guest rooms, patient rooms/operatory/treatment rooms, or some other area.



	2014	2013	2011
Bathrooms	38%	33%	39%
Main traffic space	21%	24%	16%
Lobby or entrance	17%	17%	16%
Kitchen	7%	12%	9%
Dining area	6%	6%	7%
Employee office space	6%	3%	5%
Delivery (un)loading area	1%	2%	2%
Guest rooms	1%	-	-
Patient room/ operatories/ treatment room	1%	1%	0%
Other	1%	2%	6%

Arrows (↑/↓) denote significant shift vs. last wave.

Q18. In your opinion, the cleanliness of which of the following areas is most important to your customers?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Most Important Areas to Clean

- Different types of businesses perceive customers as having differing opinions on the importance of cleanliness in certain areas. For example, those in the hospitality/lodging sector are significantly more likely to believe that bathrooms, lobbies, and kitchens are most important to their customers, while food service respondents say the same of the main traffic space, the kitchen, and the dining area.
- The cleanliness of lobbies and entrances is also believed to be most important for customers by a significantly greater proportion of those in the commercial and healthcare sectors, while these respondents also place greater emphasis on the cleanliness of employee office spaces.

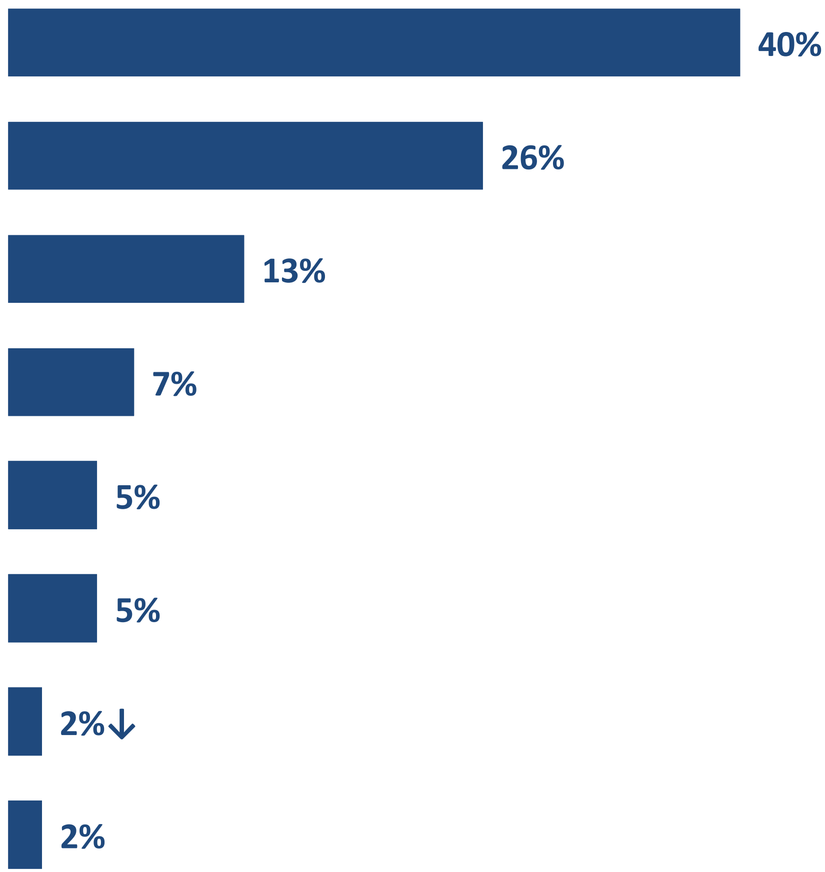
	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Bathrooms	28%↓	32%↓	46%↑	31%↓
	-14*	+3	-6	+3
Main traffic space	26%	27%	16%↓	29%↑
	-5	+10	+12	-5
Lobby or entrance	17%↑	25%↑	16%↑	7%↓
	+4	-3	-9	+4
Kitchen	4%↓	1%↓	11%↑	16%↑
	+1	-3	+3	+2
Dining area such as a cafeteria	3%↓	1%↓	2%↓	16%↑
	+2	-2	N/C	-2
Employee office space	12%↑	6%↑	2%↓	-↓
	+7	-10	N/C	N/C
Delivery loading/unloading area	2%	1%	1%	1%
	11	+1	+1	N/C
Guest rooms	-	-	3%	-
	N/C	N/C	-1	N/C
Patient room/operatories/treatment room	-	1%	-	-
	N/C	-3	N/C	N/C

Asterisks denote notable changes from previous wave //Arrows (↑/↓) denote significant shift among different audiences.

Q18. In your opinion, the cleanliness of which of the following areas is most important to your customers?
Base: All Respondents 2015 (n=400); 2014 (n=401);

Areas Perceived to be Most Difficult to Clean

- Bathrooms also take the lead when it comes to being the areas that are most difficult to clean, again mirroring results from previous waves. Kitchens follows at a distance, with a quarter saying that this is the most difficult area to clean, while slightly more than one in ten say the same thing of main traffic areas.
- Other areas, such as employee office space, lobbies or entrances, and delivery (un)loading areas are seen as being the most difficult to clean by only one in twenty, with even fewer naming dining areas as being the biggest challenge to keep clean.



		2014	2013	2011
Bathrooms	40%	44%	43%	36%
Kitchen	26%	24%	26%	22%
Main traffic space	13%	12%	13%	16%
Employee office space	7%	5%	4%	7%
Lobby or entrance	5%	4%	4%	6%
Delivery (un)loading area	5%	5%	6%	8%
Dining area	2%↓	5%	4%	3%
Other	2%	1%	0%	3%

Arrows (↑/↓) denote significant shift vs. last wave.

Q19. In your opinion, which of the following areas is usually the most difficult to clean?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Areas Perceived to be Most Difficult to Clean

- Bathrooms are seen as being most difficult to clean among respondents from all sectors except food services (dropping 12-percentage points since 2014), where here the kitchen is significantly more likely to be seen as the most difficult to clean. Those working in the hospitality/lodging industry are also among those most likely to mention kitchens.
- When it comes to commercial respondents, the main traffic space is seen as being especially difficult to clean, while respondents working in the healthcare field say the same about employee office space.

	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Bathrooms	51%↑	44%↑	45%↑	21%↓
	-1	-2	N/C	-12*
Kitchen	12%↓	15%↓	26%↑	50%↑
	N/C	+2	N/C	+6
Main traffic space	19%↑	10%	9%↓	12%
	+7	-3	-2	+1
Employee office space	8%	12%↑	4%↓	2%↓
	N/C	+3	+2	N/C
Lobby or entrance	4%	8%	7%	2%
	+3	-3	+1	+2
Delivery loading/unloading area	3%	3%	6%	9%
	-7	+1	+4	+4
Dining area such as a cafeteria	1%	2%	2%	4%
	-2	-4	-4	N/C

**Asterisks denote notable changes from previous wave //Arrows (↑/↓) denote significant shift among different audiences.*

Q19. In your opinion, which of the following areas is usually the most difficult to clean?
Base: All Respondents 2015 (n=400); 2014 (n=401)

Helpful Factors for Performing Cleaning Services

- Products that get the job done the first time and those that work quickly are most commonly seen as being most helpful for performing cleaning services.
- The overall organization of the department can also be seen as improving cleaning services, with a quarter mentioning a simpler routine that all staff can get accustomed to as being most helpful in executing cleaning services, while 16% say the same of better processes/systems that work for their specific environment.
- Staffing also plays a role in performing cleaning services, with more staff available to clean (16%), simpler training procedures (9%), and access to educational cleaning resources (4%) also mentioned as being most helpful when it comes to performing cleaning services. Very few cleaning managers find receiving information from a brand they trust (2%) as being helpful in these respects.

Arrows (↑/↓) denote significant shift vs. last wave.

Q20. In your opinion, which of the following would be most helpful when it comes to performing your cleaning services?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Helpful Factors for Performing Cleaning Services

- Compared to last year's findings, no notable gaps emerge when it comes to thinking about elements that are most helpful when it comes to performing cleaning services.
- However, differences do emerge when looking at data across the different sectors, with products that work quickly seen to be particularly helpful among those in the food service industry, while better processes or systems are significantly more likely to be selected by both those in the healthcare and hospitality/lodging sectors.

	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Products that get the job done the first time	52%	48%	52%	53%
	-5	-3	-10	+3
Products that work quickly	28%	25%↓	32%	39%↑
	N/C	-1	-4	+2
A simpler routine that all staff can get accustomed to	27%	22%	24%	26%
	+2	+2	+7	-2
More staff available to clean	13%	21%	15%	16%
	+6	+6	+2	+2
Better processes or systems that work for my specific environment	14%	22%↑	19%↑	8%↓
	+2	+4	+5	4
Simple training procedures	5%	12%	7%	13%
	-6	+1	N/C	+6
An educational cleaning resource that my staff can tap into anytime for advice	3%	3%	5%	3%
	-2	-2	-2	-1
Information from a brand I trust	4%↑	-↓	2%	1%
	+3	-2	+2	N/C

**Asterisks denote notable changes from previous wave //Arrows (↑/↓) denote significant shift among different audiences.*

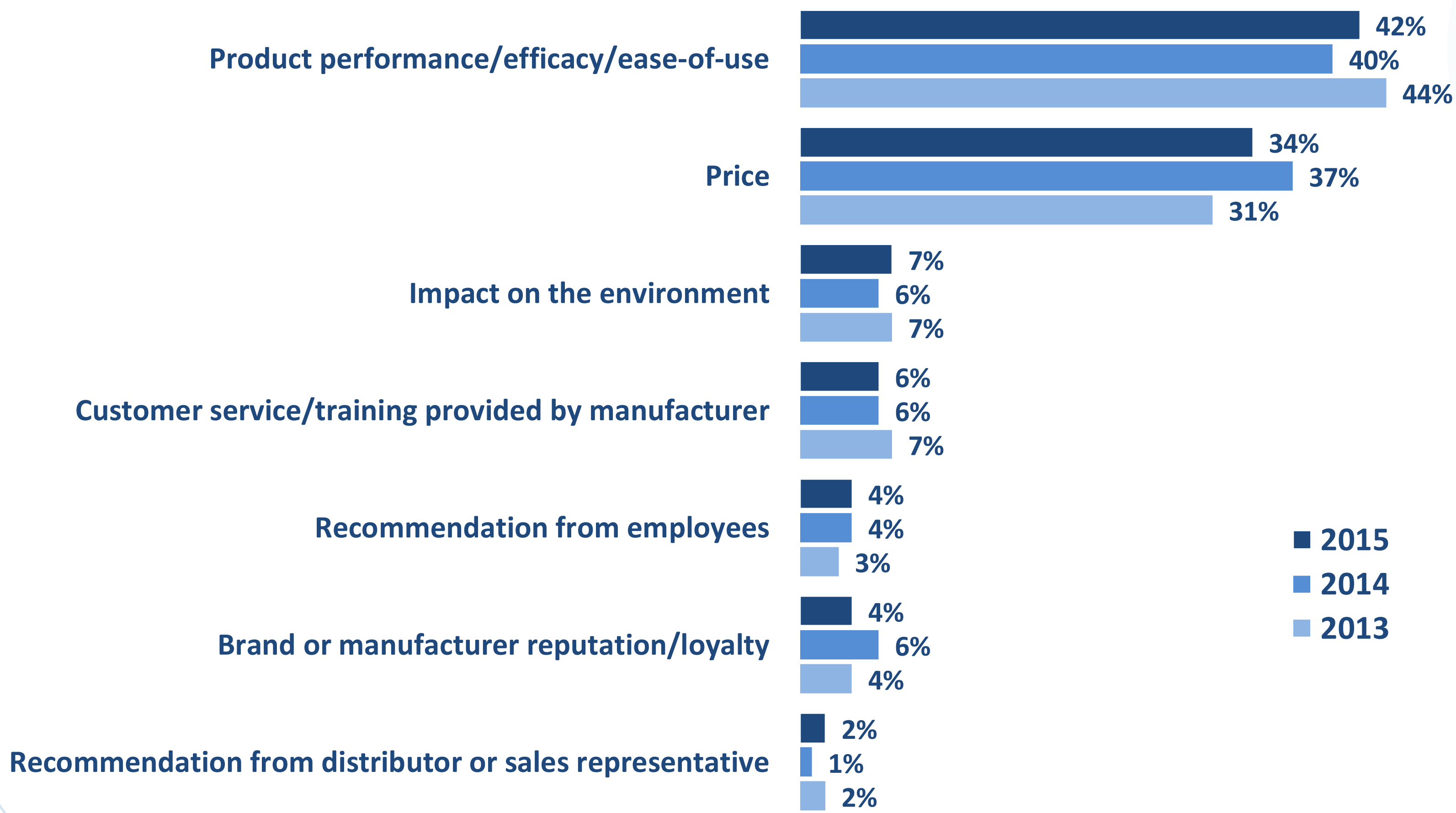
Q20. In your opinion, which of the following would be most helpful when it comes to performing your cleaning services?
Base: All Respondents 2015 (n=400); 2014 (n=401)

Cleaning Products

Detailed Findings

Top-Ranked Factors in Purchase Decision – #1 Rank

- When it comes to purchasing cleaning products, the product's performance/efficacy/ease-of-use is most likely to be rated as most important by cleaning managers, although price does not fall too far behind, seen as being most important by a third of respondents.
- Other factors such as impact on the environment, customer service, recommendations from either employees or distributors/sales reps, and the brand/manufacturer's reputation fall into a lower tier, ranked first in importance by less than one in ten cleaning managers when it comes to impacting their purchase decisions.



Q16. Please rank each of the following factors in terms of importance to you and your business when purchasing cleaning products, with 1 being the most important, 2 being second most important, and so on.
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

Arrows (↑/↓) denote significant shift vs. last wave.

Tracking Results by Sectors: Top-Ranked Factors in Purchase Decision

- When it comes to differences seen across the different sectors, respondents in the food service industry are among those most likely to rank price and customer service as number one in importance when purchasing cleaning products, while recommendations from distributors or sales representatives are more important among healthcare professionals.
- Compared to last wave, price is less influential among those in the healthcare sector.

Ranked #1	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Product performance/efficacy/ease-of-use	41%	45%	48%	35%
	(+7)	(+11)	N/C	-8
Price	35%	29%↓	30%	43%↑
	-1	-13*	-5	+8
Impact on the environment	8%	8%	6%	5%
	-2	+1	+4	-1
Customer service/training provided by manufacturer	7%	6%	2%↓	9%↑
	-1	+1	-4	+2
Recommendation from employees	3%	3%	7%	3%
	-1	-1	+3	N/C
Brand or manufacturer reputation/loyalty	3%	2%	6%	4%
	-4	-4	+1	-1
Recommendation from distributor or sales representative	2%	4%↑	-↓	1%
	+2	+2	N/C	N/C

**Asterisks denote notable changes from previous wave //Arrows (↑/↓) denote significant shift among different audiences.*

Q16. Please rank each of the following factors in terms of importance to you and your business when purchasing cleaning products, with 1 being the most important, 2 being second most important, and so on.
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

Defining Value When it Comes to Cleaning Products

- 'Value' in cleaning products is most likely to be associated with high quality/effectiveness, followed by versatility of use or ability to use a single product for more than one purpose, similar to past years.
- A low price point defines value for more than one in ten cleaning managers describing the cleaning products they use, while ease of use and quality of service from product providers are less likely to define value in this way.

Arrows (↑/↓) denote significant shift vs. last wave.

Q17. When it comes to the cleaning products you use within your business, which of the following do you feel best defines 'value?'
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408)

Tracking results by Sector: Definitions of Value

- While value in cleaning products is most likely to be defined as high quality/effectiveness among healthcare and hospitality/lodging respondents, versatility of use is just as likely to define value for those in the commercial and food service sectors.
- Furthermore, food service respondents are significantly more likely to associate the value of their cleaning products with ease of use – particularly when compared to healthcare professionals.

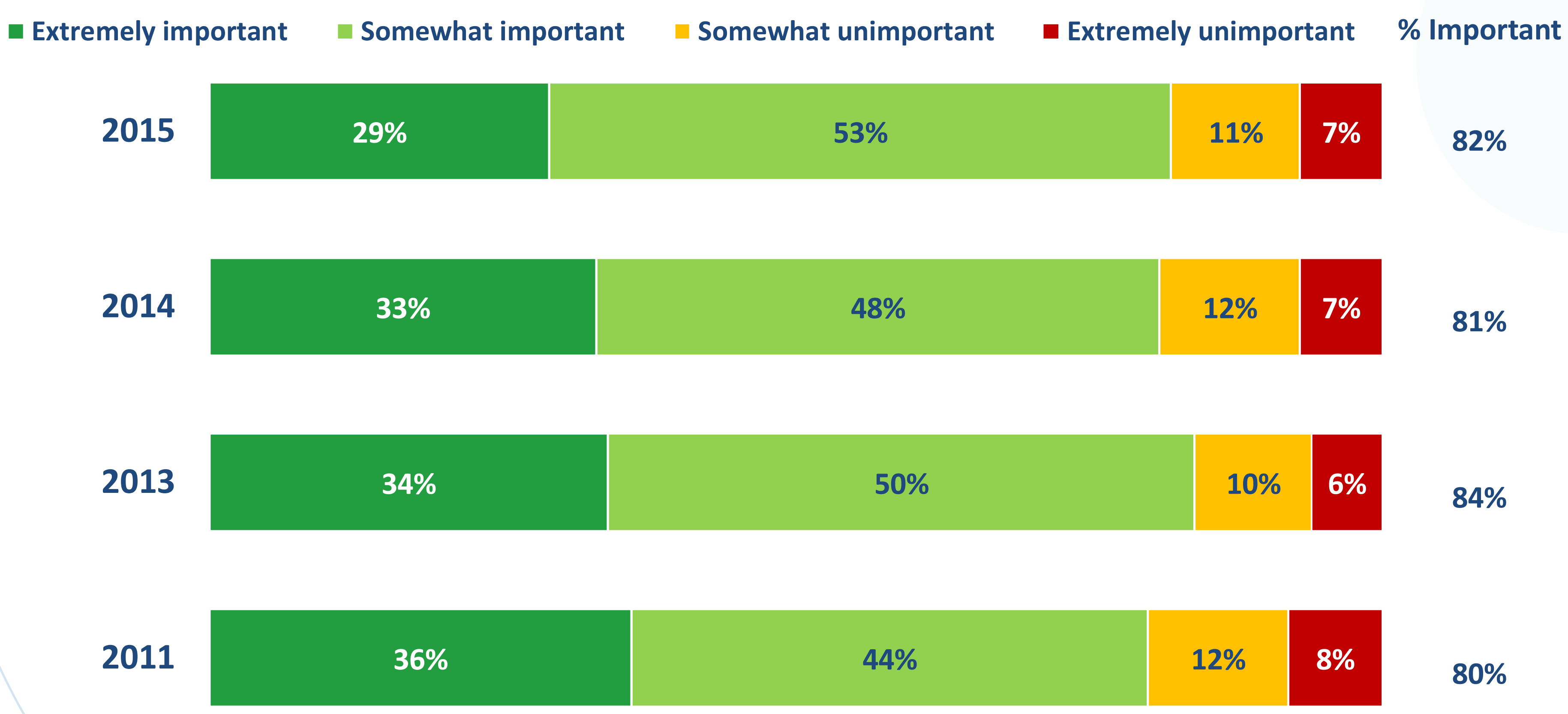
	Commercial	Healthcare	Hospitality/ Lodging	Food Service
High quality or effectiveness	33%	45%	42%	37%
	-6	+3	-9	+5
Versatility of use or ability to use a single product for more than one purpose	34%	30%	30%	36%
	-4	+7	N/C	-4
Low price point	17%	12%	14%	11%
	+5	-13*	+2	-5
Ease of use of products	10%	4%↓	8%	12%↑
	+4	-4	+6	+4
Quality of service from product providers	6%	8%	5%	3%
	+2	+5	N/C	-1

**Asterisks denote notable changes from previous wave //Arrows (↑/↓) denote significant shift among different audiences.*

Q17. When it comes to the cleaning products you use within your business, which of the following do you feel best defines 'value?'
Base: All Respondents 2015 (n=400); 2014 (n=401)

Importance of Feedback from Personnel about Cleaning Products

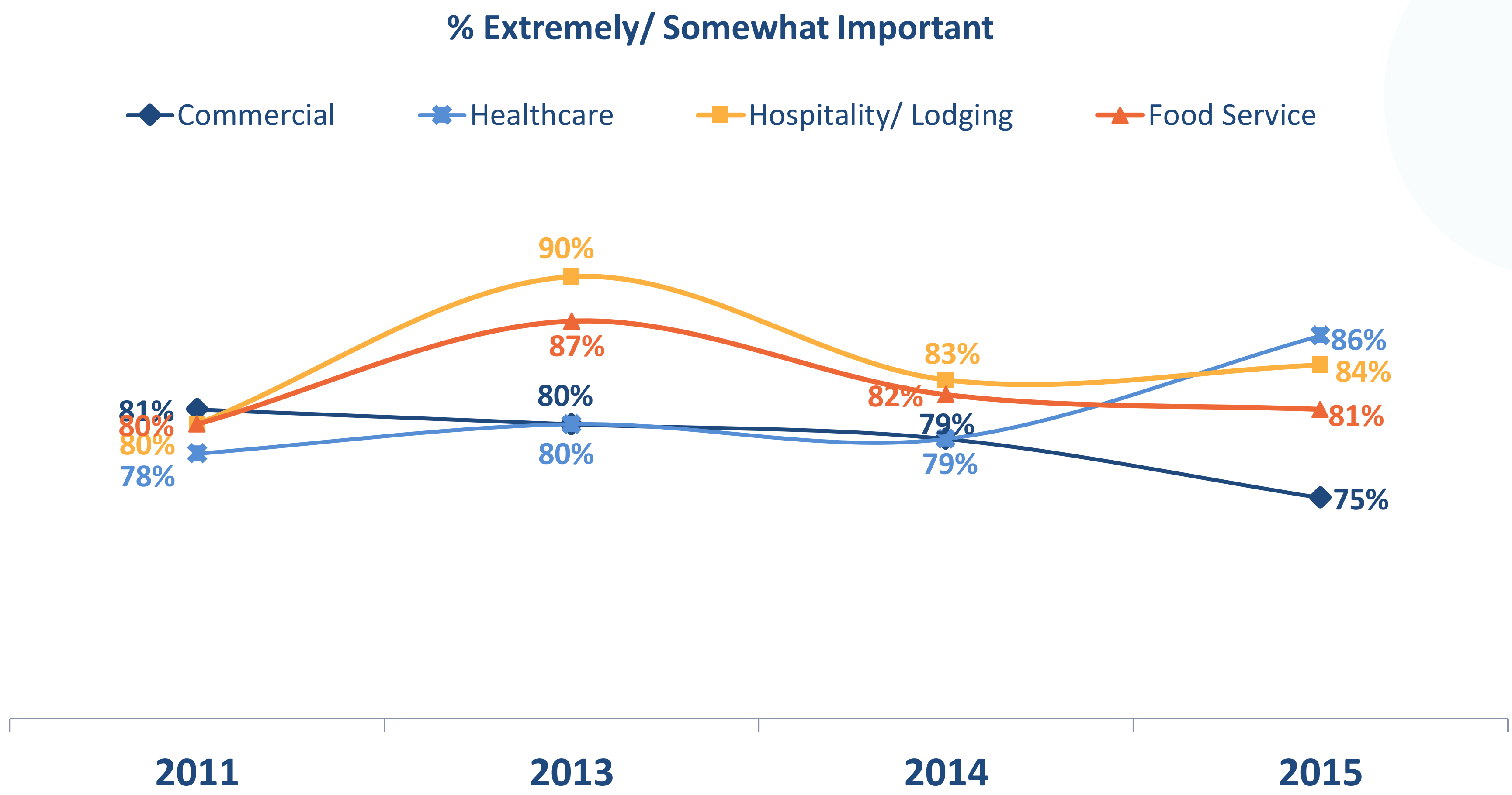
- Over eight in ten say that the opinions and feedback of cleaning personnel regarding the products being used to perform cleaning services are important, including three in ten who say that such feedback is *extremely* important.
- The proportion of those who feel this is unimportant is considerably smaller, although roughly one in ten proceed to say that feedback from their employees is either somewhat, or even *extremely* unimportant.



Q23. In your organization, how important are the opinions and feedback of cleaning personnel regarding the products being used?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Tracking Results by Sector: Importance of Feedback from Personnel about Cleaning Products

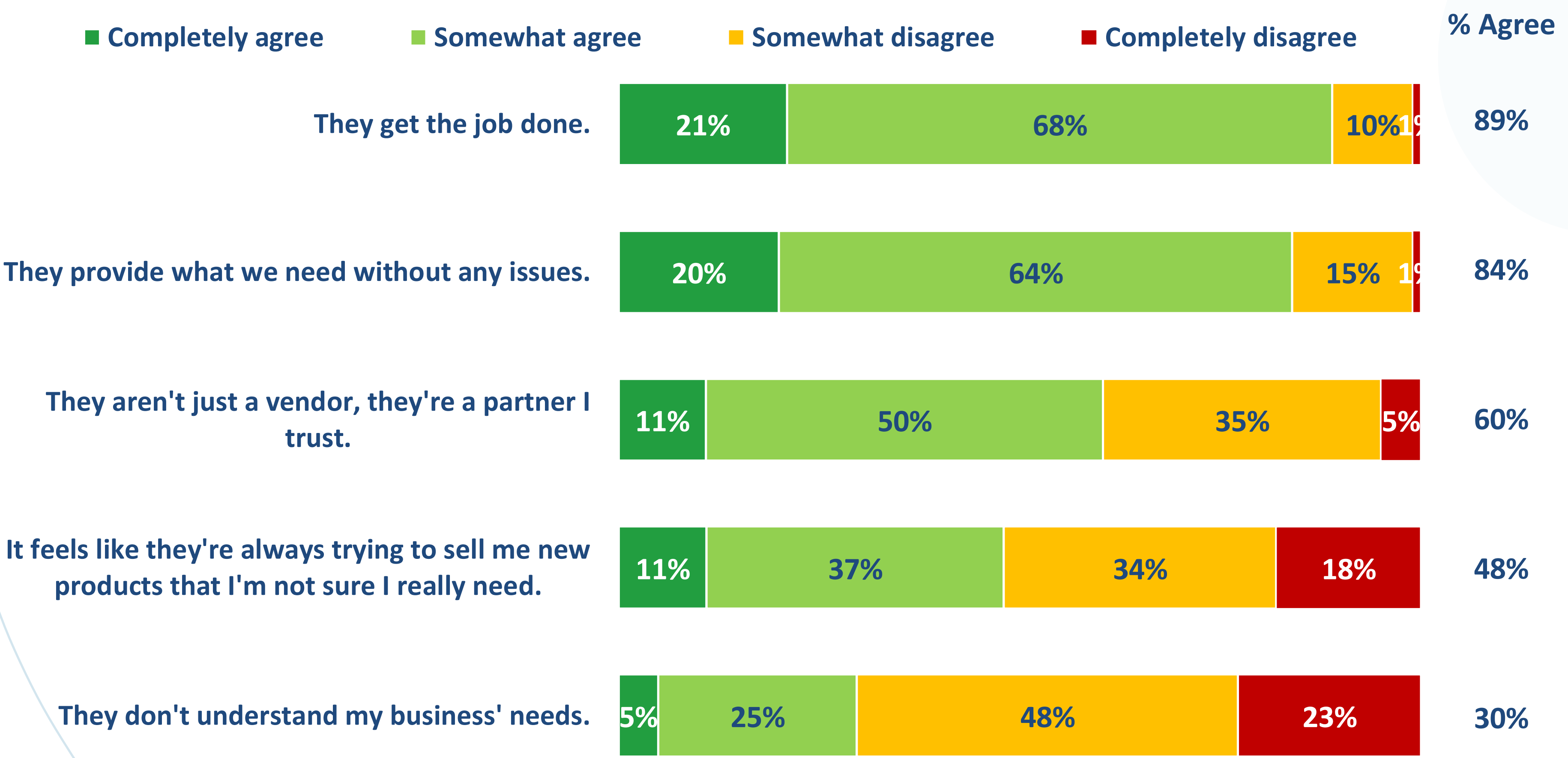
- Commercial respondents trail slightly behind those from other sectors when it comes to thinking that feedback and opinions from personnel about cleaning products is extremely/somewhat important, while those in healthcare are most likely to rate this feedback as being important (an increase vs. 2014).



Q23. In your organization, how important are the opinions and feedback of cleaning personnel regarding the products being used?
Base: All Respondents 2015 (n=400); 2014 (n=401); 2013 (n=408); 2011 (n=400)

Relationship with Cleaning Products Supplier

- Thinking about their relationship with their cleaning products supplier, cleaning managers are generally positive, with more than eight in ten agreeing that they get the job done and provide them with what they need without any issues, while another majority agree that their suppliers are not just vendors, but partners that they can trust.
- Nearly half, however, feel like their suppliers are always trying to sell them new products that they aren't even sure they really need, while three in ten feel that their suppliers do not understand their business' needs.



Q33. Thinking about your relationship with your cleaning products supplier, to what extent do you agree or disagree with the following statements?
Base: All Respondents 2015 (n=400

Relationship with Cleaning Products Supplier

- Respondents across the four sectors are have similar views when it comes to their cleaning product suppliers, though those in the hospitality/ lodging sector are more likely to see their supplier as getting the job done compared to those in the commercial sector.

% Agree	Commercial	Healthcare	Hospitality/ Lodging	Food Service
They get the job done	84%↓	87%	93%↑	91%
They provide what we need without any issues	83%	82%	87%	82%
They aren't just a vendor, they're a partner I trust	57%	59%	65%	59%
It feels like they're always trying to sell me new products that I'm not sure I really need	45%	44%	53%	51%
They don't understand my business' needs	30%	27%	28%	33%

Q33. Thinking about your relationship with your cleaning products supplier, to what extent do you agree or disagree with the following statements?
Base: All Respondents 2015 (n=400

Demographics

Job Title/Function

	Total	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Owner/operator/proprietor	42%	47%	30%	37%	52%
General Manager	35%	26%	44%	41%	30%
Building/ facility manager	10%	10%	14%	6%	8%
Maintenance/operations/housekeeping manager	8%	8%	7%	10%	6%
Purchasing manager	7%	4%	10%	5%	9%
Manager/ office manager	4%	1%	6%	2%	5%
Administration/ executive administrator	1%	1%	2%	-	-
Director	1%	-	2%	1%	-
VP/ Vice President	1%	-	2%	1%	-
Chef	1%	-	-	-	3%
Assistant manager/ director	1%	1%	-	1%	1%
Marketing/ sales	1%	-	-	1%	1%
Other	2%	5%	1%	1%	-

Number of Employees and Decision-Making Role

	Total	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Number of Employees Currently in Company					
1 - 10	35%	50%	38%	32%	21%
11 - 50	24%	9%	23%	24%	41%
51 - 100	10%	9%	11%	9%	11%
101 - 1,000	18%	17%	18%	19%	16%
1,001 - 10,000	6%	6%	6%	9%	4%
Over 10,000	7%	9%	4%	7%	7%
Person who Makes most of the Cleaning Product Decisions for Business					
Myself	61%	64%	61%	52%	65%
Another employee below me	18%	19%	20%	23%	11%
Another employee at my level	10%	10%	7%	13%	11%
Another employee above me	10%	6%	11%	9%	13%
Other	1%	1%	1%	3%	-

Age, Region, and Gender

	Total	Commercial	Healthcare	Hospitality/ Lodging	Food Service
Age					
18-39	20%	20%	19%	17%	24%
40-49	23%	18%	23%	31%	21%
50-59	32%	34%	35%	27%	33%
60+	25%	28%	23%	25%	22%
Region					
Northeast	20%	22%	20%	21%	17%
South	20%	22%	23%	16%	20%
Midwest	31%	24%	29%	32%	39%
West	29%	32%	28%	31%	24%
Gender					
Male	51%	53%	45%	47%	57%
Female	50%	47%	55%	53%	43%