

## **P&G Professional's 2011 "Cleaning Industry Insights" Survey Fact Sheet**

Procter & Gamble Professional™, the away-from-home division of Procter & Gamble, launched the 2011 "Cleaning Industry Insights" survey to explore the perceptions, attitudes and behaviors – as they relate to business in the current economic climate – of decision makers managing in-house or contract cleaning services in the healthcare, food service, hospitality/lodging and commercial industries.

The survey was conducted online with a national sample of 400 managers of cleaning operations based in the United States, June 15-20, 2011.

### **Effectiveness at Keeping Operations Costs Down**

Most respondents (84 percent overall) report their business as "somewhat" or "extremely" effective at keeping operations costs down in the past 12 months. Breakouts by specific industry of those feeling "some or extreme" pressure include:

- 85% for Food Service
- 87% for Hospitality/Lodging
- 77% for Commercial
- 84% for Healthcare

### **Pressure to Keep Operating Costs Down**

The measure of effectiveness runs parallel to the amount of pressure being felt to keep operating costs down. Overall, three in 10 respondents (30 percent) report feeling "extreme" pressure to keep operating costs down, and over half (52 percent) feel at least "some" pressure. Breakouts of those feeling "some or extreme" pressure by specific industry include:

- 77% for Food Service
- 91% for Hospitality/Lodging
- 79% for Commercial
- 83% for Healthcare

### **Efficiency of Cleaning Operations**

A strong majority (83 percent) indicate their business is "somewhat or extremely" efficient with their cleaning operations, with one in four of those (26 percent) describing their cleaning operations as "extremely" efficient. Breakouts of those feeling "somewhat or extremely" efficient by specific industry include:

- 84% for Food Service
- 79% for Hospitality/Lodging
- 84% for Commercial
- 86% for Healthcare

### **Best Value Descriptions for Business Cleaning Products**

Respondents across industries are split between "versatility of use" (48 percent) and "high quality/effectiveness" (40 percent) to determine the best value of a cleaning product. Breakouts by specific industry include:

- Food Service: 49% versatility of use vs. 40% high quality/effectiveness and 10% low price
- Hospitality/Lodging: 48% versatility of use vs. 40% high quality/effectiveness and 12% low price
- Commercial: 44% versatility of use vs. 38% high quality/effectiveness and 18% low price
- Healthcare: 49% versatility of use vs. 41% high quality/effectiveness and 10% low price

## **Most Important Business Factors**

The most important business factor across three of four sectors is “keeping customers satisfied,” followed by “growing the business” (ranked first by only the commercial sector). Breakouts by specific industry for each factor include:

- Keeping Customers Satisfied: 35% Food Service; 36% Hospitality/Lodging; 25% Commercial; 36% Healthcare
- Growing the Business: 21% Food Service; 22% Hospitality/Lodging; 27% Commercial; 23% Healthcare
- Being Efficient with Current Resources: 14% Food Service; 12% Hospitality/Lodging; 22% Commercial; 21% Healthcare
- Making a Profit: 19% Food Service; 16% Hospitality/Lodging; 16% Commercial; 9% Healthcare
- Cost Savings: 7% Food Service; 11% Hospitality/Lodging; 8% Commercial; 8% Healthcare
- Keeping Staff Employed: 4% Food Service; 3% Hospitality/Lodging; 2% Commercial; 3% Healthcare

## **Preferable Action to Improve Bottom Line**

By a margin of three to one (75 percent), respondents indicate the preferable action to improve their business' bottom line is to find ways to “become more efficient,” rather than “raise prices” (20 percent). Breakouts by specific industry include:

- Food Service: 83% said “become more efficient” vs. 14% “raise prices”
- Hospitality/Lodging: 71% said “become more efficient” vs. 24% “raise prices”
- Commercial: 70% said “become more efficient” vs. 25% “raise prices”
- Healthcare: 75% said “become more efficient” vs. 15% “raise prices”

## **Top Cut-backs Made Due to the Economy**

Office supplies, staff perks and staff resources are the frequently mentioned business cutbacks due to the economic climate. Breakouts by specific industry for each factor include:

- Office Supplies: 45% Food Service; 49% Hospitality/Lodging; 49% Commercial; 58% Healthcare
- Luxuries: 37% Food Service; 46% Hospitality/Lodging; 47% Commercial; 50% Healthcare
- Staff: 28% Food Service; 35% Hospitality/Lodging; 33% Commercial; 21% Healthcare
- Brand-name Products: 24% Food Service; 25% Hospitality/Lodging; 26% Commercial; 27% Healthcare
- Employee Benefits: 20% Food Service; 32% Hospitality/Lodging; 23% Commercial; 21% Healthcare
- Profit Margins: 25% Food Service; 25% Hospitality/Lodging; 25% Commercial; 18% Healthcare
- Inventory: 28% Food Service; 22% Hospitality/Lodging; 25% Commercial; 11% Healthcare
- Building Costs: 10% Food Service; 14% Hospitality/Lodging; 17% Commercial; 13% Healthcare
- No cut backs: 17% Food Service; 14% Hospitality/Lodging; 9% Commercial; 17% Healthcare

## **Areas Taking a ‘Doing More With Less’ Approach**

Gains in efficiency have largely been made by doing more with less staff (as reported by 62 percent of all respondents) and through internal products and services, such as using multiuse cleaning products (42 percent). Breakouts by specific industry for each factor include:

- Staff (doing more/same work with fewer employees): 66% Food Service; 67% Hospitality/Lodging; 60% Commercial; 55% Healthcare
- Internal Products/Services (using multiuse cleaning products): 41% Food Service; 38% Hospitality/Lodging; 46% Commercial; 42% Healthcare
- External Products/Services (repackaging products/services to expand current offerings): 19% Food Service; 16% Hospitality/Lodging; 28% Commercial; 13% Healthcare
- Not taken a ‘doing more with less’ approach: 20% Food Service; 15% Hospitality/Lodging; 14% Commercial; 21% Healthcare

## **Top Challenges with Managing Cleaning Staff**

The top three challenges with managing a cleaning staff today are consistent across all four sectors: “quality of work,” “lack of interest/motivation/dedication” and the volume of “employee turnover.” As the fourth most reported challenge, “training” is indicated as a top challenge by one in four (25 percent) respondents overall. Breakouts by specific industry for each factor include:

- Quality of Work: 60% Food Service; 61% Hospitality/Lodging; 55% Commercial; 63% Healthcare
- Lack of Interest/Motivation/Dedication: 54% Food Service; 66% Hospitality/Lodging; 50% Commercial; 47% Healthcare
- Employee Turnover: 37% Food Service; 44% Hospitality/Lodging; 31% Commercial; 33% Healthcare
- Training: 24% Food Service; 28% Hospitality/Lodging; 24% Commercial; 25% Healthcare
- Language Differences: 19% Food Service; 33% Hospitality/Lodging; 18% Commercial; 28% Healthcare
- Limited Resources: 18% Food Service; 20% Hospitality/Lodging; 28% Commercial; 19% Healthcare

## **Challenges/Obstacles to Effective Cleaning-related Training**

The biggest challenges associated to effective cleaning-related training differ across sectors. Breakouts by specific industry for each factor include:

- Food Service: 17% loss of work productivity; 17% actual cost of training; 16% language differences
- Hospitality/Lodging: 22% availability of qualified training leaders; 20% language differences; 18% loss of work productivity
- Commercial: 22% availability of qualified training leaders; 19% loss of work productivity; 15% actual cost of training
- Healthcare: 21% language differences; 18% loss of work productivity; 14% availability of qualified training leaders

## **Most Responsible for Training Cleaning Staff**

Across all industries, more than three-fourths (77 percent) agree that employers are seen as being the most responsible for cleaning staff training. Breakouts by specific industry include:

- 84% of Food Service agree
- 82% of Hospitality/Lodging agree
- 68% of Commercial agree
- 74% of Healthcare agree

## **Most Effective Cleaning-related Training**

Eight out of 10 (82 percent) of respondents from all industries reported that “one-on-one/on-the-job” training is most effective. Breakouts by specific industry include:

- 91% of Food Service agree
- 88% of Hospitality/Lodging agree
- 73% of Commercial agree
- 74% of Healthcare agree

## **Budget Uses If Cleaning Costs Were Cut In Half**

Nearly half of all respondents (47 percent) reported that if their cleaning costs were cut in half, they would “put the money back into the company for the following year’s budget” while one in five (20 percent) would use the surplus to “boost staff bonuses.” Breakouts by specific industry for each factor include:

- Put Money Back Into Company Budget: 53% Food Service; 42% Hospitality/Lodging; 47% Commercial; 45% Healthcare
- Boost Staff Bonuses: 13% Food Service; 25% Hospitality/Lodging; 20% Commercial; 20% Healthcare
- Hire More Staff: 14% Food Service; 12% Hospitality/Lodging; 14% Commercial; 23% Healthcare
- Reduce Customer Prices: 11% Food Service; 11% Hospitality/Lodging; 12% Commercial; 5% Healthcare

## **Most Helpful Elements to Performing Cleaning Services**

By and far, products that get the job right the first time (47 percent), products that work quickly (30 percent), and simpler cleaning routines (25 percent) are reported as the three most helpful elements when it comes to performing cleaning services across all industries. Breakouts by specific industry for each factor include:

- Products that Get the Job Done Right the First Time: 55% Food Service; 46% Hospitality/Lodging; 39% Commercial; 47% Healthcare
- Products that Work Quickly: 34% Food Service; 29% Hospitality/Lodging; 32% Commercial; 26% Healthcare
- A Simpler Routine: 25% Food Service; 28% Hospitality/Lodging; 23% Commercial; 24% Healthcare
- More Available Staff: 17% Food Service; 22% Hospitality/Lodging; 14% Commercial; 18% Healthcare
- Better Processes/Systems for My Environment: 7% Food Service; 14% Hospitality/Lodging; 17% Commercial; 16% Healthcare
- Simple Training Procedures: 6% Food Service; 15% Hospitality/Lodging; 10% Commercial; 8% Healthcare

## **Methodology**

This study was conducted online June 15-20, 2011. The sample consists of 400 managers of cleaning operations based in the United States from the following industries: Food Service (n=100); Hospitality/ Lodging (n=100); Commercial (n=100); and Healthcare (n=100).

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. Total percentages may not add up to 100% due to rounding.

## **About P&G Professional**

Procter & Gamble Professional™ is the away-from-home division of Procter & Gamble, serving the foodservice, building cleaning and maintenance, hospitality and convenience stores industries. P&G Professional offers complete solutions utilizing its parent company's scale, trusted brands and strengths in market and consumer understanding. P&G Professional features such brands as Tide®, Dawn®, Mr. Clean®, Febreze®, Swiffer®, and its own brand, P&G Pro Line®. Please visit [www.pgpro.com](http://www.pgpro.com) for the latest information about P&G Professional's solutions.

## **About Procter & Gamble**

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