

CONSUMERS' PERCEPTION OF CLEANLINESS AND HYGIENE IN AND OUTSIDE THE HOME

CLEANLINESS AND HYGIENE ARE PART OF CONSUMERS' BASIC NEEDS

- Having a clean home, a clean environment and wearing clean clothes are as important for EU consumers as being in good health, having financial stability and having positive relationships
- Cleanliness and hygiene are motivated by health and the comfort of a clean environment
- 61% of consumers agree that the industry facilitates convenient and modern lifestyles and 55% mention that the industry provides products important for their wellbeing

HOW IMPORTANT ARE THESE ASPECTS?

Be in good health	92%
Have financial stability	91%
Wear clean clothes	90%
Have positive relationships	89%
Have clean and healthy surroundings	86%
Have a clean home	86%
Have quality food	86%
Have a rewarding job	81%

81% of EU consumers acknowledge the importance of **hygiene at home**

86% of EU consumers say having a **clean home** is as important as having **quality food**

AT HOME

57% think that the industry makes their lives **more enjoyable and satisfying**

83% EU consumers say living in a **clean environment** is a **mark of respect** for people and family

CLEANLINESS AT HOME : MORE THAN JUST GETTING RID OF DUST !

- Europeans take pride in a clean home: 71% agree cleaning and maintenance products help improve their quality of life
- 87% agree that cleanliness and hygiene are important for their own health as well as for the health of people around them
- Cleaning is a rewarding activity. It brings peace of mind to 88% of people and is a mark of respect for 83%
- For 71% of consumers, a dirty home is synonymous with chaos
- Europeans definitely want their homes spick and span when guests come over: 62% don't mind if it is a little chaotic as long as it remains healthy
- 74% agree their belongings last longer if they clean them regularly, and that it helps maintain the durability of goods (48%)

71% EU consumers say that cleaning and maintenance products **improve their quality of life**

90% consumers agree that when **guests** come over, they always want to **make sure** that their **house is clean**

IMAGINE YOU ARE IN A HOTEL/HOSPITAL:
How important do you judge the following elements?

Cleanliness of bed linen and towels	95%
Cleanliness of bathroom and toilets	95%
Quality of service overall	94%
Friendliness of staff	91%

OUTSIDE THE HOME
CLEANLINES AND HYGIENE ARE ESSENTIAL AND ALSO LEAD TO POSITIVE FEELINGS AND BEHAVIOURS

- 63% of EU consumers agree the industry protects their health and keeps public places (e.g. hospitals, offices, airports) clean and hygienic
- 77% agree that cleanliness in public transport is important; in public places 59% take cleanliness for granted
- Cleanliness and hygiene promotes positive behavior: 76% citizens work better in a clean office space, and 79% would be less inclined to buy something from a dirty shop or supermarket
- Expectations of hygiene standards are high in schools and food factories (71%)
- Clean bed/bath linen and a clean bathroom in hotels and hospitals are considered as important as the overall service provided

HEALTHCARE

For **94%** of EU citizens
clean dishes in a restaurant
are as important as
food quality

LAUNDRY

44% of EU citizens
think about the impact
of good hygiene or
food safety when buying
processed food

FOOD, BEVERAGE & AGRICULTURE

62% of EU citizens
think we should talk more
about the importance of
cleanliness and hygiene
outside the home

BUILDING CARE

KITCHEN & CATERING

79% of EU citizens
feel less inclined to shop
when the shop/supermarket
environment is dirty

TECHNICAL CLEANING

The top criteria when buying laundry detergents remain firstly economic:

- Total price of the box: **78%**
- Special offers and promotions: **71%**
- The detergent form (i.e. liquid/powder): **70%**
- The fragrance: **71%**

Price per wash (instead of per kilo) is not yet strongly established (64%), and other criteria such as sustainability profile rank lower

Overall, 89% consumers are satisfied with the performance and quality of products they buy for cleaning at home:

- Western Europe: **89%**
- Eastern Europe: **92%**
- Southern Europe: **88%**
- UK/Ireland: **86%**
- Scandinavia: **86%**

DECISION FACTORS

SATISFACTION

CONSUMERS' HABITS WHILE CLEANING AT HOME

CLEANING PROFILE



- 56% of consumers prefer to clean the house themselves to be sure it's done as they want, instead of hiring a cleaner
- The cleaning chores seem to be spread among different members of the family (for 84% of the population)
- According to our panelists, doing the laundry is a shared chore and no longer the responsibility of the woman only
- There is a pretty good understanding of the difference between cleanliness and hygiene (69%)
- EU consumers are not all the same! The cleaning behaviour of consumers varies considerably across Europe (for example, higher average wash temperatures in Scandinavia vs rest of Europe)

CLEANING FREQUENCY

AT LEAST ...

Several times a week:

- 72% Clean the kitchen counter with detergent
- 64% Tidy up my home
- 52% Clean the toilet

Once a week or more:

- 86% Use the vacuum cleaner
- 79% Clean the bathroom
- 72% Wash the tea towels
- 78% Wash the bathroom towels

ONCE EVERY TWO WEEKS OR ONCE A WEEK ...

- 67% Change the bed sheets

SMALL HABIT CHANGES IN LAUNDRY AND AUTOMATIC DISHWASHING

LAUNDRY:

- Liquid laundry detergents have grown in popularity and are used as often now as powder detergents
- The number of washes per two weeks has decreased slightly over the years (from 6,7 in 2008 to 6,1 in 2017), whilst staying relatively stable in recent years
- The same stability trend applies to filling of the washing machine



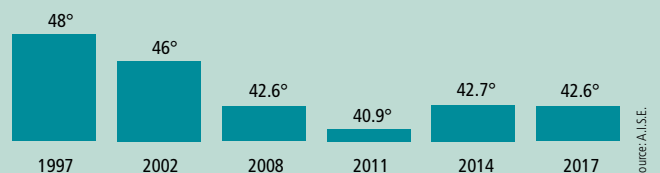
ENERGY SAVINGS FROM WASHING AT LOW TEMPERATURE – A CONTINUING CHALLENGE

The average wash temperature has remained unchanged in recent years and is stable at 42.6°C, despite savings potential from washing at low temperatures.

- 40°C remains the most popular washing temperature
- 26% of washloads in Europe are done at 30° or below and they usually include:
 - Delicates (58%)
 - Woollens (40%)
 - Synthetics (34%)
 - Dark colours (33%)
- Follow A.I.S.E.'s low temperature washing laundry guidance at www.iprefer30.eu

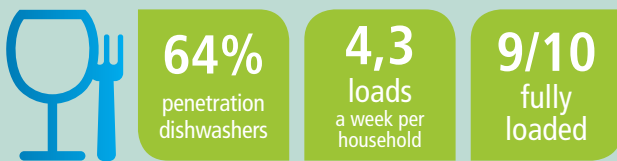


Evolution of the average wash temperature across Europe:



AUTOMATIC DISHWASHING:

- Dishwasher ownership and usage have increased in the EU (from 60% in 2011 to 64% in 2017)
- Dishwashers are filled to capacity 92% of the time
- Frequency of use has stayed relatively stable across the years



DOSAGE HABITS – A MIXED PICTURE

- Most EU consumers find it easy to dose laundry detergents (74%)
- A decreasing number of people say they measure the amount of detergent they use (from 79% in 2008 to 62% in 2017). This may be due to the increased use of unit doses
- The bottle cap is most often used (44%) for measuring liquid detergents
- An increasing number of consumers is aware that the number of washes is indicated on each pack (89%, up from 82% in 2008)



74% OF EU CONSUMERS FIND IT EASY TO DOSE LAUNDRY DETERGENTS

57% EU CONSUMERS CORRECTLY ADD THE RECOMMENDED AMOUNT OF DETERGENT

I am aware of the dosing instructions on the pack	63%
I find it easy to dose laundry detergents	74%
I usually measure the amount of detergent I use	62%
I check each new pack I buy for dosing instructions	50%
I add more detergent than recommended	24%
I add less detergent than recommended	23%

71% OF CONSUMERS ARE AWARE OF WHAT THIS ICON MEANS →

The laundry basket icon indicates the number of washes per package, with medium soil and medium water hardness level (Detergent Regulation requirement).



SUSTAINABILITY TRENDS

IN GENERAL

Overall, trends regarding sustainability and laundry/cleaning products are relatively stable versus three years ago. In general, Southern Europeans care the most about sustainability. When consumers are asked about measures that industry should take to improve sustainability, they propose:

- provide products in recyclable packaging (56%)*
- provide products in recycled packaging (53%)*
- create products that work well at low temperatures (50%)
- provide reassurance that the product is not going to harm the environment (47%).

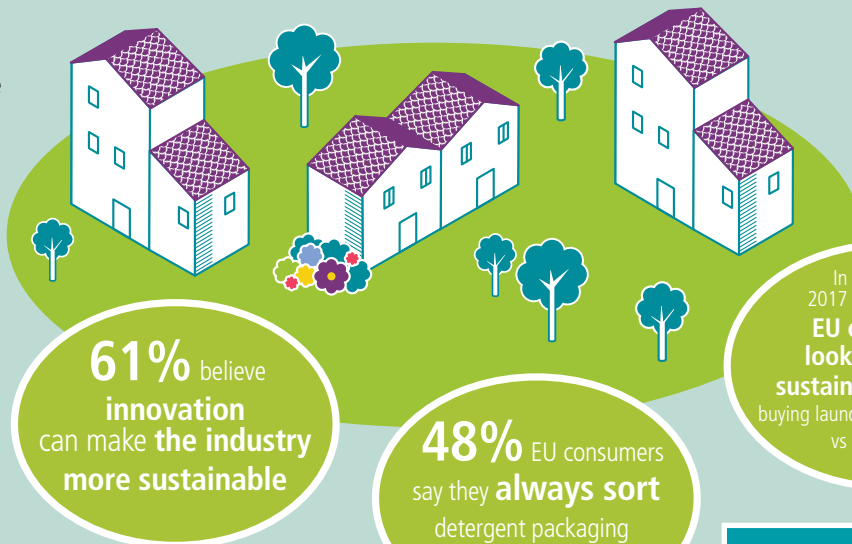
WHO IS RESPONSIBLE FOR SUSTAINABLE CLEANING ACCORDING TO CONSUMERS ?

Although 80% of the energy footprint of laundry detergents is in the use phase, consumers consider the industry as primary responsible

The laundry/cleaning industry as a whole	74%
The brands	71%
Professional users	69%
Consumers	65%
Government	60%
Retailers	50%

FURTHER POTENTIAL FOR PERSONAL EFFORTS TOWARDS SUSTAINABLE CLEANING

- 47% consumers say that apart from purchasing sustainable laundry/cleaning products, they try to clean in a more sustainable way
- The action taken most by consumers to do the laundry more sustainably is to avoid underfilling the machine (69%). A general trend vs 2008 shows decreasing efforts by consumers from key habits (e.g. low temperature washing (53%), use concentrated detergents (29%) etc)
- This same trend applies to automatic dishwashing (use water saving programmes (51%), use sustainable detergents (33%))



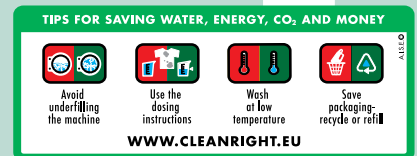
PACKAGING AND RECYCLING:

- In Europe, 90% consumers sort their detergent packaging but the margin of improvement to have them do so in a systematic way is still big (52%)
- The minority that does not recycle does not think about it (32%) or cannot do it in their municipality (31%)
- When asked about efforts that industry could undertake to improve sustainability, packaging is high on the list!*

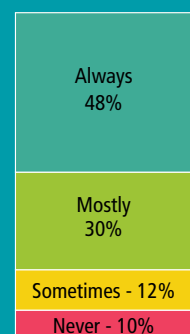


A GENERAL LEVEL OF TRUST REGARDING LABELS AND CLAIMS

- As regards sustainability claims, 34% mention that they usually look for this information on laundry/cleaning products before buying; 44% of consumers mention that tend to look more at these claims versus five years ago
- 43% usually trust sustainability claims made by cleaning brands
- Official ecolabels (60%) are considered as important as labels that inform consumers on sustainable use (59%) (such as the cleanright best use panel); this is closely followed by labels provided by the company and/or brands (43%)



RECYCLE THE PACKAGING?



SAFE USE AND LABELLING

SAFETY PERCEPTION

Perceptions by European consumers on the safety of household laundry, cleaning and maintenance products for them or and the environment has not evolved much over the years. Overall this perception has slightly improved versus 2008/2011/2014



51%
say the products
are safe for
people
(32% are neutral)

30%
say the
products are
safe for the
environment
(36% are
neutral)



PERCEPTION

READING ON PACK INFORMATION - INTEREST IN DECLINE

- Compared to 2008, less consumers read information on pack. Still, in 2017, 52% claim that they read it BEFORE PURCHASING a product, while 60% mention that they do so BEFORE USING the product. It remains to be seen whether these claims, which are actually quite high, are indeed happening in reality.
- Variations do exist among different regions (with greater interest from Southern and Eastern Europe).
- When benchmarking these findings with other A.I.S.E. research (cf BRES Feb. 2017), we see indeed that the average time spent on a label, when forcing consumers' attention, is about 20 seconds, irrespective of the label size/content.
- When asked whether they deliberately look for ingredient information, 37% of European consumers respond positively, explaining that they do so essentially to:
 - Compare products (59%)
 - Avoid a specific substance (29%)
 - Look at the amount of a specific substance (28%)
 - Because they are allergic to a particular substance (24%)
- Consumers' ranking of product hazard in case of misuse is done based on their own perceptions and not based on the product's actual classification and labelling (cf BRES Feb. 2017).



HALF OF CONSUMERS NEVER READ THE LABEL. EVEN WHEN THEY DO SO, VERY LITTLE TIME IS SPENT READING THE SAFETY INFORMATION.

BRES Feb. 2017: A.I.S.E. Better Regulation and Safe Use project

SOURCES OF INFORMATION



- The packaging is currently still the most important source of information
- When asked whether digital technologies will offer more opportunities to access information on detergents and maintenance products, 56% agree
- How online information can replace on-pack information remains to be further explored (35% are inclined towards, 55% in Southern Europe)

56%
of consumers
believe **digital technologies**
will offer more opportunities
to **access information**

36%
of families
with **young children**
still store their laundry detergents
unsafely



93%
of EU consumers
understand A.I.S.E. safe use advice:
"Always keep away from children"



PRODUCT STORAGE: SAFER BEHAVIOUR IS DEFINITELY POSSIBLE

- When asked where products are stored, 47% of consumers mention that laundry detergents are mostly placed on a low shelf or under the sink in an unlocked location. Although Western European and Scandinavians more often choose for a high shelf
- Storage of different products such as laundry detergents, automatic dishwashing detergents and drain cleaners does not seem to be subject to much difference
- In the case of families with children under five years old, there is potential for improved safe storage habits

FOR FURTHER INFORMATION ON THIS SURVEY AND ON CLEANLINESS & HYGIENE: www.aise.eu - www.cleanright.eu