

A.I.S.E.'s pan-European habits survey 2020

A·I·S·E

Key facts & figures

Perceptions of the cleaning and hygiene industry by European citizens, and evolution of their habits

Introduction

Every three years since 2008, A.I.S.E. has commissioned a pan-European survey on citizens' habits and perceptions. The objective of this exercise is to find out about perceptions vis-à-vis the cleaning and hygiene products industry, as well as to monitor habits and their evolution, in the domains of washing and cleaning as well as sustainability.

This summary provides the results of the 2020 research that was undertaken by the market research agency Insites Consulting for A.I.S.E.. The fieldwork was carried out in February. In order to establish whether and to what extent attitudes and understandings of cleanliness and hygiene may have changed during the COVID-19 pandemic, certain sections of the survey were re-run in June. These comparative results will be communicated in detail at a later stage.

Methodology

The survey was run in 23 countries in Western, Southern, Eastern Europe and Scandinavia, with approximately 200 respondents per country (total about 4500 online questionnaires (in February and June), recruitment via panel, men and women, aged 18-65, responsible for purchase and using a laundry machine).

The data provided in this summary is from the full survey and the partial re-run in June 2020, with some benchmarking with former years.



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Survey highlights



Cleaning and hygiene **in my home** is important because it helps me and/or the people I live with **avoid becoming unwell** or getting an **infectious disease**.



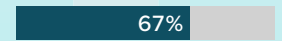
- ✓ Continued understanding of the benefits of a clean home
- ✓ Importance of cleanliness and hygiene in public spaces reinforced since COVID-19
- ✓ Acknowledgement of the need for products to clean homes and workplaces
- ✓ Further opportunities for low temperature washing and better dosage in laundry
- ✓ Growth in penetration of household dishwashers
- ✓ Awareness of product safety, opportunities for safer storage
- ✓ Good sorting habits for packaging at home, high expectations of brands
- ✓ Growing interest in digitalisation of information

80%

of the population interested (or neutral) to **use digital technologies instead of on-pack** information



We should talk more about the importance of (and standards used for) cleanliness and hygiene **outside the home**



66%

of families with children **store** their laundry detergent **safely**

Average wash temperature
42,4°C

4,9
dish loads/
week

The cleaning and hygiene industry **protects our health** and keeps our offices, hospitals, restaurants and **public places clean and hygienic**



When I take **public transportation** (eg metro, airports), cleanliness and hygiene are important



51%
Always sort their packaging of detergent or maintenance products



Cleanliness & hygiene at home

European citizens continue to understand and value the health and infection prevention benefits of a clean home



Cleaning and hygiene **in my home** is important because it helps me and/or the people I live with **avoid becoming unwell** or getting an **infectious disease**.



My **own cleanliness** and hygiene is not just important for myself; it is also **important for the health of people around me**.



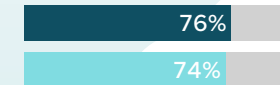
It's important to prevent infections through **good hygiene practices**, but it is also important **not to be obsessive** about cleanliness in our homes.



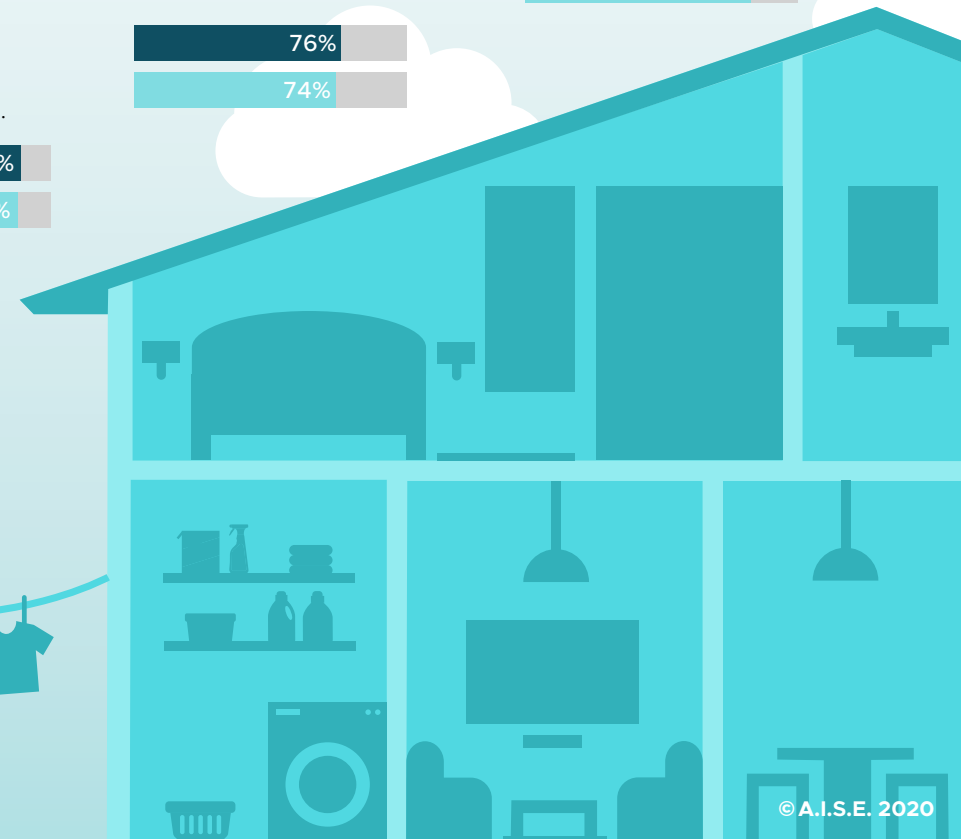
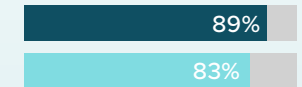
When my place is clean, it gives me **peace of mind**.



My **belongings last longer** if I clean them regularly



Living in a clean environment is a **mark of respect** for me and my family

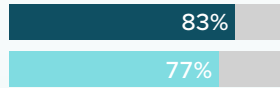


Citizens 'confirm' that.. June 2020 Feb 2020 Oct 2017

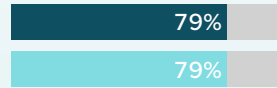
Cleanliness & hygiene outside the home

COVID-19 has reinforced that cleanliness and hygiene in public spaces is important to European citizens, and they are eager to learn more about professional cleaning standards

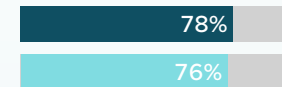
When I take **public transportation** (e.g. metro, airports), cleanliness and hygiene are important



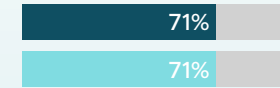
When I am in a **shop** or a **supermarket**, if I perceive the environment as dirty, I feel uncomfortable and less inclined to buy something there



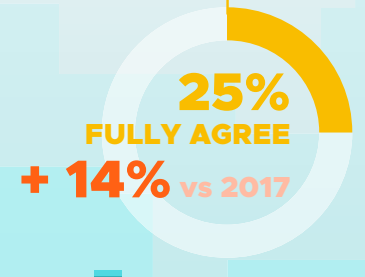
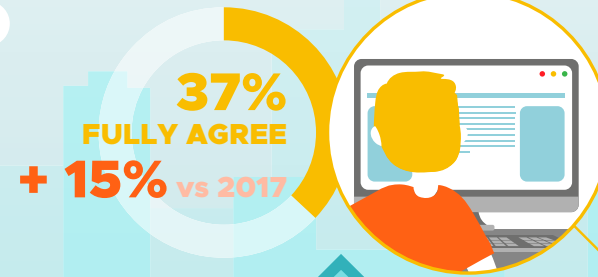
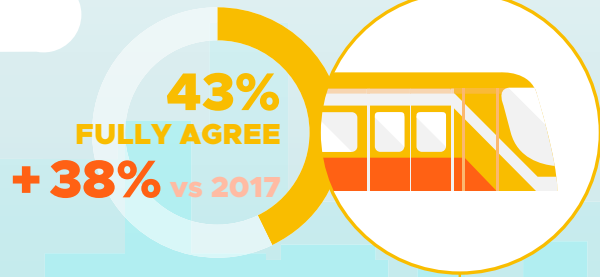
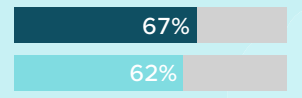
I work better in a **clean office space**



When I leave my children at **school**, I would like to be sure that their surroundings and the food they eat there are in line with high quality hygiene standards



We should talk more about the importance of (and standards used for) cleanliness and hygiene **outside the home**



Citizens 'fully agree' or 'agree' June 2020 Oct 2017

Citizens 'fully agree' June 2020

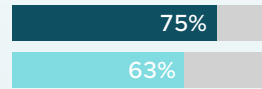
+/- % : Relative difference vs former benchmark, and likely COVID-19 effect

Cleaning & hygiene industry

Consumers recognise the need for products to clean their homes and workplaces in a safe, efficient and effective manner

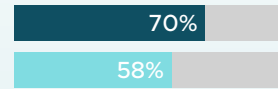
The cleaning and hygiene industry...

protects our health and keeps our offices, hospitals, restaurants and **public places clean and hygienic**



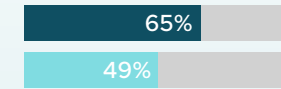
+ 19%
vs 2017

protects our health and keeps our **homes clean and hygienic**



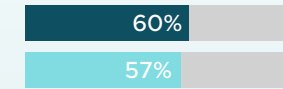
+ 21%
vs 2017

provides products that are **important for my health**

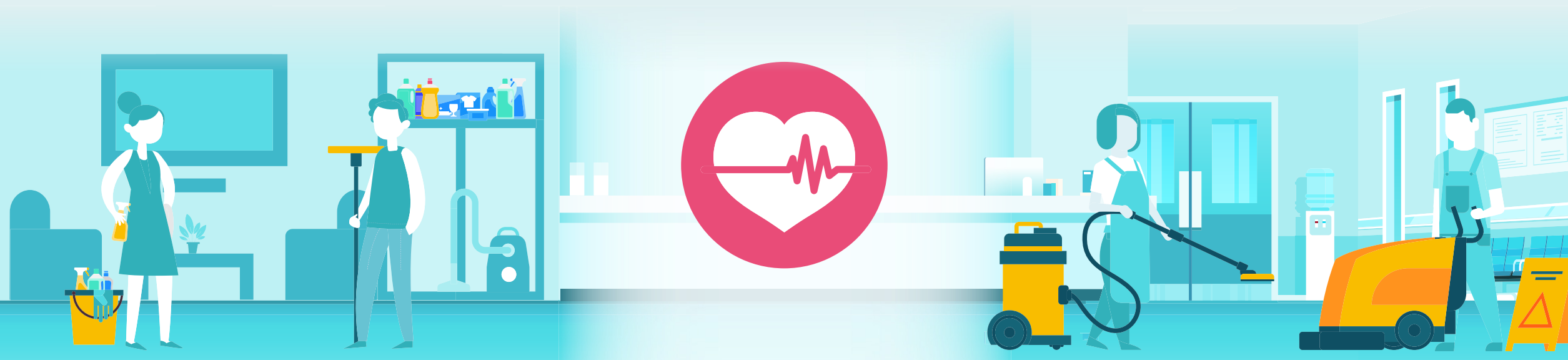


+ 33%
vs 2017

makes our lives more **enjoyable and satisfying**



+ 5%
vs 2017



Citizens 'agree' or 'fully agree'

■ June 2020

■ Oct 2017

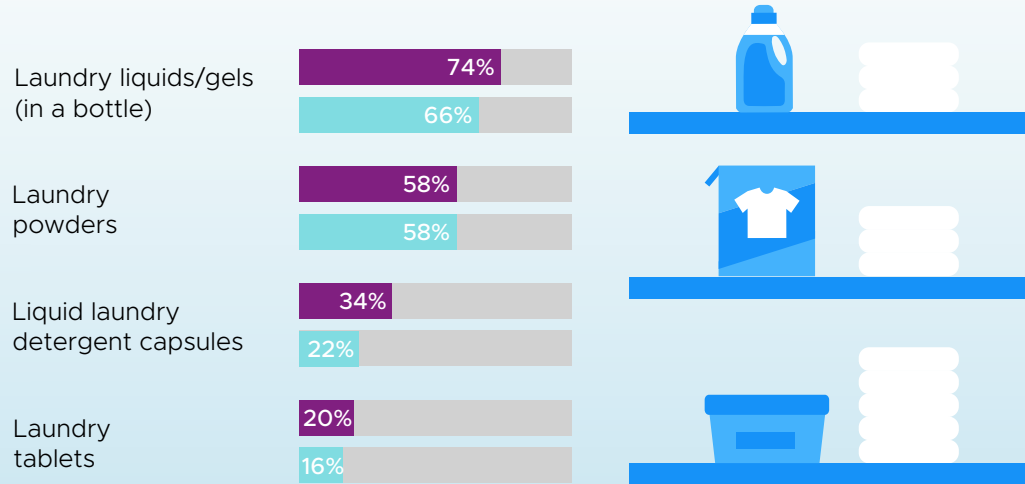
■ +/- % : Relative difference vs former benchmark

Laundry habits

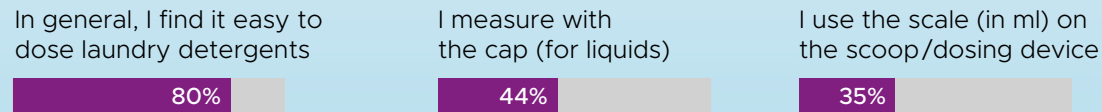
Liquid detergents preferred and further opportunities for lower temperatures and better dosage

Liquid detergents and capsules are consumers' preferred format

Types of laundry detergent used (for normal wash) over the past few months:



Few consumers actually used the measuring device, despite finding dosage 'easy'



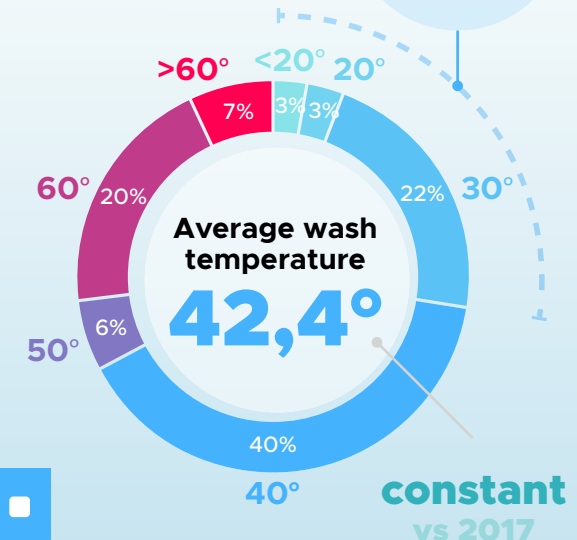
57% of consumers are aware of what this icon means →



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

6,7 washes/2 weeks

+ 10% vs 2017



Only 28% of loads washed at **30°** or below...

Level of filling 82%

constant vs 2017

'Yes' Feb 2020 Oct 2017

Dishcare habits

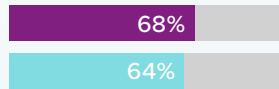
The use of dishwashers in European households continues to grow, as well as number of loads



+ 6%
vs 2017

68%

The average penetration of dishwashers in Europe continues to grow, but with disparities between EU regions (e.g. Eastern 50%, Southern 80%)



4,9
washes/
week

+ 11%
vs 2017

Detergents are the preferred choice for cleaning the dishwasher

Special detergent for the machine

68%

Machine cleaning cycle

36%

High temperature program

24%

Other

5%



constant
vs 2017

Level
of filling
88%

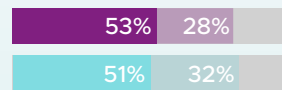
Feb 2020 Oct 2017

Safety and safe use

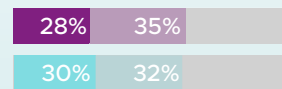
A general feeling that products are safe but opportunities for more trust in EU legislation and safer storage habits

Citizens' perceptions of product safety have not evolved much since 2017, with a large number of people having 'no opinion'

Detergents are safe for people who use them



Detergents are safe for the environment



The role that EU legislation plays to protect EU citizens and ensure product safety is undervalued, offering opportunities to all stakeholders for better regulation

EU legislation guarantees safety

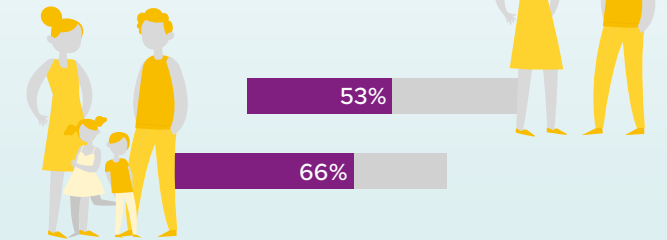


66%
of families with children **store** their laundry detergent **safely**



Two thirds of families with children **store laundry detergents safely**. There is room for improvement, despite high awareness of artwork on pack.

Safe storage from kids
Detergents are **stored in a locked cupboard and/or on a high shelf**



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

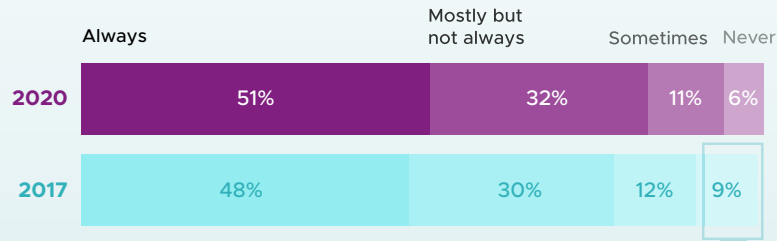
'Agree' and 'completely agree' Feb 2020 Oct 2017

'Neutral' Feb 2020 Oct 2017

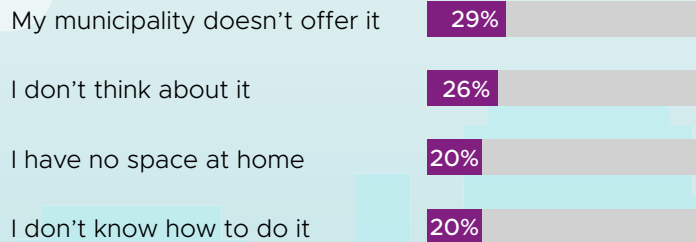
Product packaging

Overall, citizens have good sorting habits, but they also continue to expect a lot from brands

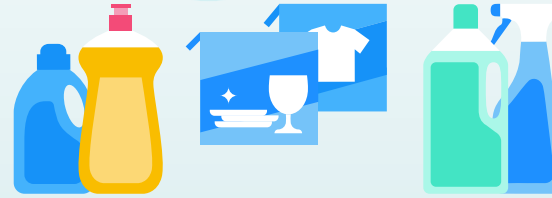
A majority of citizens in Europe always or mostly sort their detergent packaging, with further opportunities to make it an 'automatic' habit



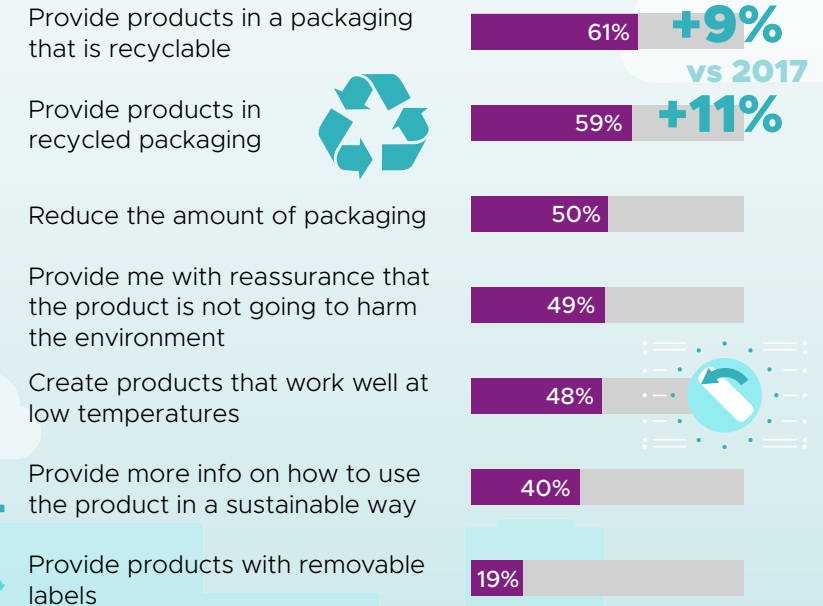
Those who don't sort their packaging have various reasons:



51% + 6% vs 2017
Always sort their packaging of detergent or maintenance products



When asked what brands could undertake to improve sustainability, citizens rate packaging-related initiatives highly



'Yes' Feb 2020

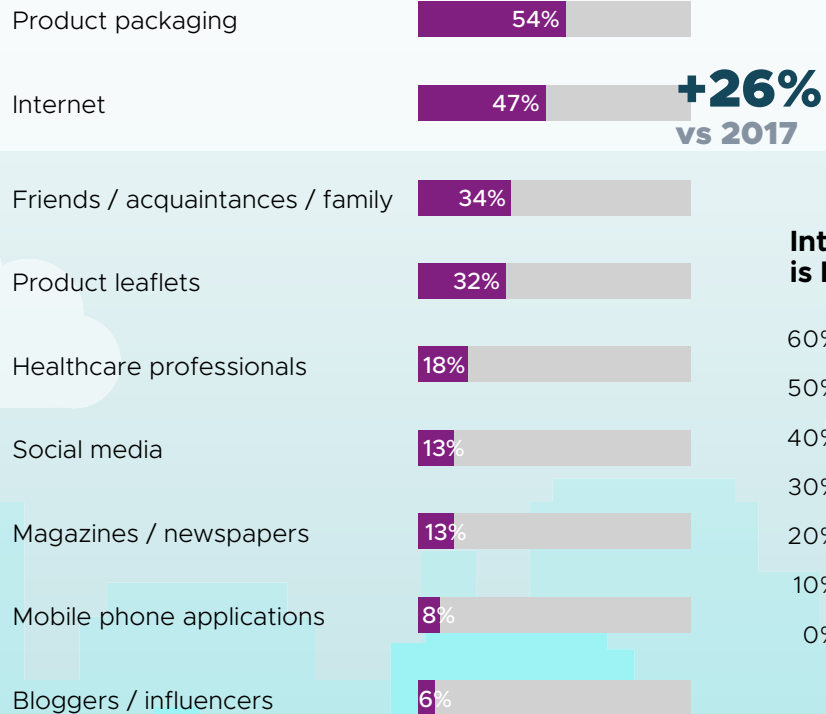
Note: the colour code for the various packaging waste sorting bins in Europe varies from country to country - this example here is "indicative"; please refer to your local schemes.

Product information and digitalisation

Citizens have a growing interest to move to online information, irrespective of their age

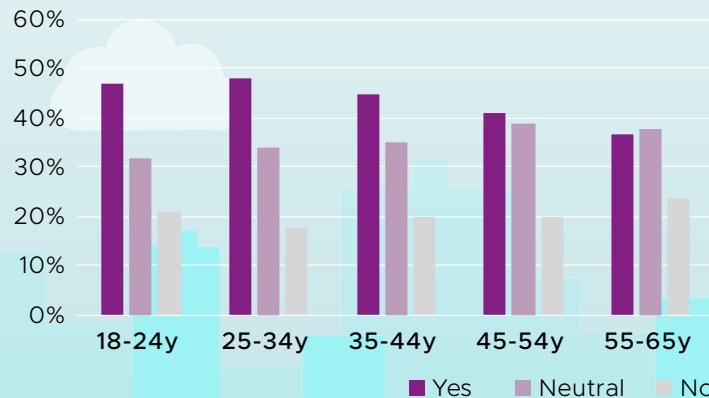
Packaging and the internet are the top two sources to access information on detergents and maintenance products

Citizens use these sources of information:



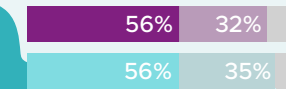
80%
of the population interested (or neutral) to **use digital technologies instead of on-pack** information

Interest to find information online vs on-pack is high and not much influenced by age

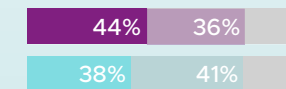


Digitalisation of information is an obvious trend

I believe that digital technologies will offer me **more opportunities to access information** on detergents and maintenance products



If available, I would be inclined to **use more digital technologies** than on-pack information to access information about detergent and maintenance products



+16%
vs 2017

'Yes' Feb 2020 Oct 2017

'Neutral' Feb 2020 Oct 2017

For sound and expert advice on cleaning and hygiene at home

Visit A.I.S.E's multi-lingual consumer portal
www.cleanright.eu

cleanright.eu

Cleaning and hygiene

Safe use

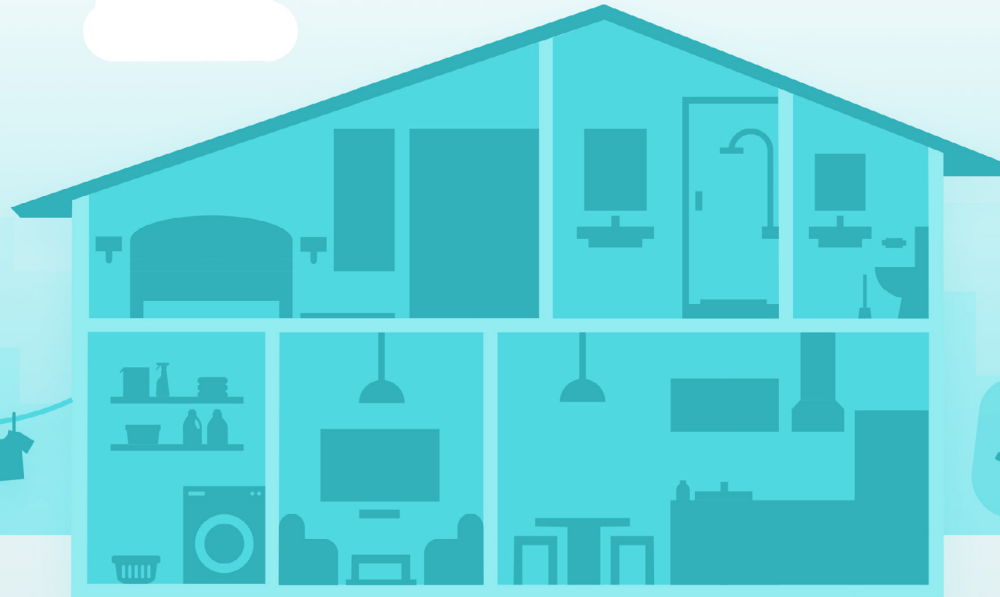
Sustainable cleaning

Read the label

EN

A clean home is a comfortable home

How to clean your home, which products to choose and how to use them safely and sustainably.



Bathroom



Laundry room



Toilet



Kitchen



Living room



Bedroom