P&G Professional™

P&G Professional's
2013 Cleaning Industry Insights Survey Fact Sheet

Procter & Gamble Professional™, the away-from-home division of Procter & Gamble, is unveiling the 2013 Cleaning Industry Insights Survey which explores the attitudes and behaviors of decision makers managing cleaning services across four key industries: Healthcare, Food Service, Hospitality/Lodging and Commercial. The 2013 survey follows the inaugural investigation completed in 2011, enabling results to be compared and contrasted in the wake of a changing economic climate. The survey was conducted online in May 2013 in partnership with Ipsos Public Affairs, with a national sample of 408 managers of cleaning operations based in the United States.

Effective at Keeping Operations Costs Down

An enormous nine out of 10 respondents (88%) report their business as being effective at keeping operating costs down in the past 12 months. This is an increase of 5% when compared against 2011. Below are breakouts by industry of those who feel they are "extremely" or "somewhat" effective.

- 90% for Commercial
- 90% for Healthcare
- 86% for Hospitality/Lodging
- 83% for Food Service

Pressure to Keep Operating Costs Down

Across all sectors, 77% of respondents revealed they are under pressure to keep operating costs down. Below are breakouts by industry of those who feel they are under "extreme" or "some" pressure.

- 88% for Healthcare
- 76% for Hospitality/Lodging
- 73% for Food Service
- 70% for Commercial

While the pressure is still on it has certainly dropped off compared with 2011, when levels were at 83% overall. The biggest reduction was in the Hospitality/Lodging sector, where people experiencing pressure dropped by 15% when compared with 2011. The one exception to this is the Healthcare industry, where levels of pressure increased, and "extreme pressure" went up slightly from 27% in 2011 to 35% in 2013.

Efficiency of Cleaning Operations

Across sectors, 84% of respondents felt that their cleaning operations have been efficient in the past 12 months. Below are breakouts by industry of those who felt their business was "extremely" or "somewhat" efficient.

- 87% for Healthcare
- 84% for Hospitality/Lodging
- 84% for Commercial
- 82% for Food Service

Opinions remain largely on par with those from 2011, however a greater proportion of respondents deem their businesses to be "extremely efficient" in 2013 (33%) versus those in 2011 (26%). The Food Service industry saw the largest jump, with 39% of respondents selecting "extremely efficient" in 2013 versus 25% in 2011.

Preferable Action to Improve Bottom Line

By a margin of nearly four to one, 78% of respondents indicate the preferable action to improve their business' bottom line is to "find ways to become more efficient," rather than "raise prices" (15%). Below are breakouts by industry.

- **Healthcare**: 84% said "become more efficient" vs. 10% "raise prices"
- **Hospitality/Lodging**: 78% said "become more efficient" vs. 17% "raise prices"
- **Food Service**: 75% said "become more efficient" vs. 16% "raise prices"
- **Commercial**: 73% said "become more efficient" vs. 19% "raise prices"

As in 2011, finding ways to become more efficient remains the preferred method for businesses to improve their bottom line rather than raising prices. The only exception is the Food Service Industry, where this sentiment dropped from 83% in 2011 to 75% in 2013.

Ways of Increasing Efficiency

Nearly six in 10 respondents (59%) overall report "reducing waste" as the top way in which their business has become more efficient over the past two years. This was followed closely by "better negotiating on the cost of products and services" (47%) and "using more effective products and services" (43%). Below are breakouts by industry for each factor.

- **Reducing Waste:** 62% Food Service; 61% Healthcare: 57% Commercial; 55% Hospitality/Lodging
- **Better negotiating on the cost of products and services:** 55% Healthcare; 46% Hospitality/Lodging; 44% Food Service; 42% Commercial
- **Using more effective products and services:** 53% Hospitality/Lodging; 42% Food Service; 43% Healthcare; 34% Commercial
- **Retaining staff and reducing turnover:** 44% Healthcare; 44% Hospitality/Lodging; 42% Food Service; 36% Commercial
- **Training staff:** 52% Food Service; 44% Hospitality/Lodging; 42% Healthcare; 23% Commercial
- **Following more streamlined procedures:** 48% Healthcare; 38% Commercial; 37% Hospitality/Lodging; 35% Food Service
- **Empowering staff to make decisions and lead on projects:** 36% Hospitality/Lodging; 28% Healthcare; 25% Food Service; 14% Commercial
- **Outsourcing fewer services:** 26% Commercial; 24% Healthcare; 23% Hospitality/Lodging; 22% Food Service

Most Important Business Factors

The most important business factor across all four sectors is "keeping customers satisfied." The Food Service sector and the Commercial sector ranked "growing the business" as a close second, while the Healthcare sector's secondary focus is "being as efficient as possible with our current resources." Below are breakouts by industry for each factor.

- **Keeping Customers Satisfied:** 28% Food Service; 39% Hospitality/Lodging; 29% Commercial; 34% Healthcare
- **Growing the Business:** 24% Food Service; 17% Hospitality/Lodging; 24% Commercial; 12% Healthcare
- **Being Efficient with Current Resources:**15% Food Service; 13% Hospitality/Lodging; 18% Commercial; 23% Healthcare
- **Making a Profit:** 21% Food Service; 16% Hospitality/Lodging; 17% Commercial; 13% Healthcare
- **Cost Savings:** 9% Food Service; 10% Hospitality/Lodging; 6% Commercial; 12% Healthcare
- **Staff Retention:** 4% Food Service; 5% Hospitality/Lodging; 7% Commercial; 7% Healthcare

In both 2011 and 2013, the top priority for businesses has remained consistent – customer satisfaction. Interestingly, the Healthcare industry saw a drop in the focus on “growing the business” from 23% in 2011 to just 12% in 2013.

Top Cut-backs Made Due to the Economy

Office supplies and staff luxuries are the two most likely business cutbacks in the current economic climate and the most likely sector to look at this is Healthcare (compared to Food Service). Below are breakouts by industry for each factor.

- **Office Supplies:** 32% Food Service; 36% Hospitality/Lodging; 39% Commercial; 46% Healthcare
- **Luxuries:** 23% Food Service; 34% Hospitality/Lodging; 31% Commercial; 44% Healthcare
- **Brand-name Products:** 21% Food Service; 28% Hospitality/Lodging; 26% Commercial; 27% Healthcare
- **Employee Benefits**: 24% Food Service; 25% Hospitality/Lodging; 22% Commercial; 30% Healthcare
- **Staff:** 21% Food Service; 24% Hospitality/Lodging; 22% Commercial; 28% Healthcare
- **Profit Margins**:16% Food Service; 17% Hospitality/Lodging; 19% Commercial; 18% Healthcare
- **Inventory:** 13% Food Service; 20% Hospitality/Lodging; 13% Commercial; 19% Healthcare
- **Building Costs:** 7% Food Service; 8% Hospitality/Lodging; 9% Commercial; 12% Healthcare
- **No cut backs**: 26% Food Service; 17% Hospitality/Lodging; 20% Commercial; 11% Healthcare

Interestingly, in virtually every category, respondents reported fewer cutbacks in 2013 than in 2011. For example, cutbacks on office supplies dropped from 50% in 2011 to 38% in 2013, and cutbacks on staff luxuries dropped from 45% in 2011 to 33% in 2013.

Ways that Businesses are “Doing More with Less”

Relying on less staff (57%), followed by making the most of internal products and services, such as using multiuse cleaning products (33%), are the top ways businesses are “doing more with less.” Below are breakouts by industry for each factor.

- **Staff, (e.g. doing more/same work with fewer employees)**: 58% Food Service; 58% Hospitality/Lodging; 50% Commercial; 62% Healthcare
- **Internal Products/Services (e.g. using multiuse cleaning products):** 31% Food Service; 37% Hospitality/Lodging; 29% Commercial; 35% Healthcare
- **External Products/Services (e.g. repackaging products/services to expand current offerings):** 4% Food Service; 7% Hospitality/Lodging; 16% Commercial; 7% Healthcare
- **Their business has not taken a ‘doing more with less’ approach**: 28% Food Service; 26% Hospitality/Lodging; 26% Commercial; 19% Healthcare

When compared with 2011, overall, fewer respondents report that their business is taking a “do more with less” approach in 2013.

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” (60%), “lack of interest/motivation/dedication” (53%) and the volume of “employee turnover” (36%). Below are breakouts by industry for each factor.

- **Quality of Work**: 70% Food Service; 60% Hospitality/Lodging; 55% Commercial; 56% Healthcare
- **Lack of Interest/Motivation/Dedication**: 64% Food Service; 50% Hospitality/Lodging; 47% Commercial; 53% Healthcare

- **Employee Turnover:** 39% Food Service; 43% Hospitality/Lodging; 32% Commercial; 30% Healthcare
- **Training:** 30% Food Service; 37% Hospitality/Lodging; 24% Commercial; 30% Healthcare
- **Language Differences**: 18% Food Service; 27% Hospitality/Lodging; 23% Commercial; 19% Healthcare
- **Limited Resources**: 16% Food Service; 13% Hospitality/Lodging; 11% Commercial; 22% Healthcare

In keeping with 2011, "quality of work" remains the top challenge and that percentage has stayed consistent at 60%. Some notable shifts within sectors do emerge, particularly in the Commercial and Hospitality/Lodging industries. "Lack of interest/motivation/dedication" is no longer the challenge most frequently mentioned by respondents in Hospitality/Lodging with 50% selecting it versus 66% selecting it in 2011. The Commercial sector saw a decline in "limited resources" being deemed a top challenge from 28% in 2011 to just 11% in 2013.

Challenges/Obstacles to Effective Cleaning-related Training

The biggest challenges associated with effective cleaning-related training differ across sectors, however the largest challenge overall is "loss of work productivity" at 20%. Below are breakouts by industry for the top four factors.

- **Food Service**: 20% loss of work productivity; 15% language differences; 15% availability of qualified training leaders; 10% cost of training, and 20% none of the above
- **Hospitality/Lodging**: 21% loss of work productivity; 18% language differences; 11% cost of training; 8% for each of availability of qualified training leaders, availability of quality training programs, and access to relevant and/or up-to-date training materials and 16% none of the above
- **Commercial:** 18% loss of work productivity; 13% availability of qualified training leaders; 11% cost of training; 10% language differences and 15% none of the above
- **Healthcare:** 21% loss of work productivity; 14% cost of training; 13% language differences; 12% availability of qualified training leaders, and 13% none of the above

Across sectors there are few changes since 2011; however there is a notable drop in the Hospitality/Lodging industry. "The availability of qualified training leaders" dropped from 22% to just 8% in 2013.

Most Important Factors When Choosing Cleaning Products

"Product performance/efficacy/ ease-of-use" (44%) and "price" (31%) are by far the two top-ranked factors in terms of importance when purchasing cleaning products. Below are breakouts by industry for each of the leading factors.

- **Product performance/efficacy**: 41% Food Service; 47% Hospitality/Lodging; 45% Commercial; 45% Healthcare
- **Price:** 36% Food Service; 30% Hospitality/Lodging; 32% Commercial; 27% Healthcare
- **Customer service/training provided by manufacturer**: 4% Food Service; 8% Hospitality/Lodging; 4% Commercial; 12% Healthcare
- **Impact on the environment**: 10% Food Service; 5% Hospitality/Lodging; 5% Commercial; 9% Healthcare
- **Brand or manufacturer reputation/loyalty:** 5% Food Service; 5% Hospitality/Lodging; 4% Commercial; 1% Healthcare
- **Recommendation from employees:** 3% Food Service; 1% Hospitality/Lodging; 7% Commercial; 2% Healthcare

Little has changed since 2011 with "product performance/efficacy/ease-of-use" and "price" remaining consistent as the top purchasing factors in 2013.

Defining "Value" in Cleaning Products

Across all sectors, respondents are most likely to associate "value" in cleaning products with "high quality or effectiveness" (40%) followed closely by "versatility of use, single product for more than one purpose" (32%), trumping "low price point" at only 13%. Below are breakouts by industry for the top four responses within each sector.

- **Food Service**: 46% High quality or effectiveness; 27% versatility of use, single product for more than one purpose; 14% low price; 9% ease of use of products
- **Hospitality/Lodging:** 43% High quality or effectiveness; 33% versatility of use, single product for more than one purpose; 14% low price;7 % ease of use of products
- **Commercial:** 34% High quality or effectiveness; 35% versatility of use, single product for more than one purpose; 14% low price; 10% ease of use of products
- **Healthcare:** 36% High quality or effectiveness; 33% versatility of use, single product for more than one purpose; 10% low price; 12% ease of use of products

Factors that define value are consistent when reviewed against 2011, with quality and versatility continuing to lead across all sectors.

Most Important/Most Difficult Areas to Clean

In most sectors, bathrooms are the critical area, ranked as the most important to clean (33% overall) particularly by those in the Hospitality/Lodging sector. They are also ranked the most difficult to clean (43% overall). However, those in Food Service rank the "main traffic space" as the most important to clean, and "kitchens" the most difficult to clean. Below are breakouts by industry.

Most Important:

- **Bathrooms:** 19% Food Service; 50% Hospitality/Lodging; 30% Commercial; 31% Healthcare
- **Main traffic space:** 35% Food Service; 12% Hospitality/Lodging; 29% Commercial; 20% Healthcare
- **Lobby or Entrance:** 7% Food Service; 16% Hospitality/Lodging; 16% Commercial; 27% Healthcare
- **Kitchen:** 26% Food Service; 12% Hospitality/Lodging; 5% Commercial; 5% Healthcare
- **Dining area such as cafeteria:** 11% Food Service; 4% Hospitality/Lodging; 3% Commercial; 6% Healthcare
- **Employee office space:** 1% Food Service; 0% Hospitality/Lodging; 8% Commercial; 4% Healthcare
- **Delivery (un)loading area:** 1% Food Service; 1% Hospitality/Lodging; 4% Commercial; 1% Healthcare

Most Difficult:

- **Bathrooms**: 52% Commercial; 50% Healthcare; 48% Hospitality/Lodging; 20% Food Service;
- **Kitchen:** 57% Food Service; 24% Hospitality/Lodging; 13% Healthcare; 11% Commercial
- **Main traffic space:** 17% Commercial; 15% Healthcare; 12% Hospitality/Lodging; 6% Food Service
- **Delivery (un)loading area:** 11% Food Service; 6% Commercial; 5% Hospitality/Lodging; 3% Healthcare
- **Employee office space:** 10% Healthcare; 3% Hospitality/Lodging; 2% Commercial; 0% Food Service
- **Lobby or entrance:** 5% Commercial; 4% Healthcare**;** 4% Hospitality/Lodging; 3% Food Service
- **Dining area:** 5 % Healthcare**;** 4% Hospitality/Lodging; 4% Commercial; 2% Food Service

The shifts between 2011 and 2013 are most notable in the Commercial and Food Service sectors. 29% from the Commercial sector deem the main traffic space as the most important area to keep clean, nearly twice as many as in 2011(13%). In the Food Service sector, 57% of respondents say that the kitchen is the most difficult to clean versus 41% in 2011.

Helpful Factors for Performing Cleaning Services

By far, "products that get the job done the first time" was the most helpful factor across all sectors, selected by 54% of respondents – and this was even higher in Food Service at 65%. "Products that work quickly" follows closely at 33% and "a simpler routine that all staff can get accustomed to" comes in at 22%. "Simple training procedures" are more likely to be viewed as helpful by the Hospitality/Lodging sector, compared to that of Food Service. Below are breakouts by industry.

- **Products that get the job done the first time**: 65% Food Service; 57% Hospitality/Lodging; 50% Healthcare; 45% Commercial
- **Products that work quickly:** 37% Food Service; 36% Healthcare**;** 32% Hospitality/Lodging; 29% Commercial
- **A simpler routine that all staff can get accustomed to:** 26% Commercial; 24% Hospitality/Lodging; 21% Food Service; 19% Healthcare
- **Better processes or systems that work for my specific environment:** 19% Healthcare; 15% Commercial; 14% Hospitality/Lodging; 12% Food Service
- **More staff available to clean:** 18% Healthcare; 14% Food Service; 12% Hospitality/Lodging; 12% Commercial
- **Simple training procedures:** 13% Hospitality/Lodging; 10% Commercial; 10% Healthcare; 5% Food Service
- **An educational cleaning resource that my staff can tap into any time for advice:** 4% Food Service; 3% Hospitality/Lodging; 3% Commercial; 0% Healthcare

Results in 2013 are mostly consistent with 2011.

What's Preventing the Cleaning Department from Running as Smoothly as Possible

Respondents across sectors hold similar views when it comes to barriers preventing their cleaning departments from running more smoothly. Overall, 39% of respondents found that "staff effort and attitude, unhappy or unmotivated employees" is their top concern. This was followed by "budget cuts/limited resources" (25%) and "training" (22%). Below are breakouts by industry for each factor.

- **Staff effort & attitude (unhappy or unmotivated employees)**: 43% Food Service; 42% Healthcare**;** 36% Commercial; 34% Hospitality/Lodging
- **Budget cuts/limited resources/understaffed**: 29% Healthcare; 28% Hospitality/Lodging; 21% Food Service; 20% Commercial
- **Training (on proper cleaning):** 32% Hospitality/Lodging; 21% Food Service; 20% Healthcare; 16% Commercial
- **Confusion (regarding product use)**:12% Hospitality/Lodging; 10% Commercial; 8% Healthcare; 5% Food Service
- **Product purchasing (buying too many)**: 11% Healthcare; 8% Food Service; 6% Hospitality/Lodging; 6% Commercial
- **There are no operational inefficiencies relating to my businesses' cleaning efforts:** 29% Commercial; 25% Food Service; 24% Hospitality/Lodging; 21% Healthcare

Of note when compared with 2011 findings, "budget cuts/limited resources" was less likely to be selected, dropping from 35% in 2011 to 25% in 2013. Also, more report that there are no operational inefficiencies relating to their businesses' cleaning efforts in 2013 (25%) compared to 2011 (17%).

Importance of Feedback from Personnel about Cleaning Products

Over eight in ten respondents (84%) overall indicate that the opinions and feedback of cleaning personnel regarding products is "important," including a third who say that it is "extremely important." Below are breakouts by industry that deem such feedback as "somewhat" or "extremely" important.

- **Hospitality/Lodging:** 90%
- **Food Service:** 87%
- **Commercial:** 80%
- **Healthcare**: 80%

Results regarding importance of feedback are mostly consistent with 2011 findings.

<u>Perceptions of Current Economic Climate</u>

Though only about a third of respondents (36%) feel that the recession is over, three quarters (75%) expect business within their sector to improve within the next twelve months. Those in the Hospitality/Lodging sector tend to be the most optimistic. Below are breakouts by industry of those who "agree."

The Economic Recession is now over:

- Hospitality/Lodging: 47%
- Commercial: 37%
- Healthcare: 32%
- Food Service: 29%

I expect my business within my sector to improve within the next twelve months:

- Hospitality/Lodging: 88%
- Food Service: 77%
- Commercial: 73%
- Healthcare: 64%

<u>Causes of Worry Regarding Business in General</u>

"Reduction in business, caused by economic downturn" is identified as the leading cause of worry at 44% overall, followed by "customer dissatisfaction" at 38%. Roughly one in five (23%) also worry about "low staff morale and engagement." Interestingly, Healthcare was the sector most likely to be concerned about "budgetary cuts." Also, "negative publicity" is a greater concern among those in the Food Service and Hospitality/Lodging sectors. Below are breakouts of leading causes of worry by industry.

- **Reduction in business caused by economic downtown:** 49% Commercial; 43% Food Service; 44% Hospitality/Lodging; 39% Healthcare
- **Customer dissatisfaction:** 49% Food Service; 41% Hospitality/Lodging; 40% Commercial; 22% Healthcare
- **Low staff morale and engagement:** 28% Healthcare; 24% Hospitality/Lodging; 23% Food Service; 18% Commercial
- **Budgetary cuts:** 39% Healthcare; 18% Food Service; 17% Hospitality/Lodging; 12% Commercial;
- **Competitors doing a better job:** 23% Commercial; 17% Hospitality/Lodging; 16% Food Service; 9% Healthcare
- **High Staff turnover:** 21% Healthcare; 16% Hospitality/Lodging; 13% Food Service; 10% Commercial
- **Job cuts/layoffs:** 25% Healthcare; 14% Food Service; 13% Commercial; 7% Hospitality/Lodging
- **Negative publicity:**19% Food Service; 17% Hospitality/Lodging; 12% Commercial; 7% Healthcare

<u>Causes of Worry about Cleaning/Disinfection</u>

The top three causes for worry about cleaning or disinfection overall (as it relates to their business) are "customer dissatisfaction or complaints" at 44%, "food sanitation/food poisoning issues" at 27% and "pests or vermin" at 25%. Hospitality/Lodging was most likely to be concerned about "customer dissatisfaction or complaints" and "food sanitation or food poisoning issues" are of particular concern among those in the Food Service sector. Below are breakouts by industry.

- **Customer dissatisfaction or complaints:** 59% Hospitality/Lodging; 45% Healthcare; 38% Food Service; 34% Commercial
- **Food sanitation/food poisoning issues:** 57% Food Service; 20% Healthcare**;** 19% Hospitality/Lodging; 14% Commercial
- **Pests or vermin:** 31% Food Service; 31% Hospitality/Lodging; 21% Commercial; 19% Healthcare
- **Being linked to a virus or disease outbreak:** 32% Healthcare; 29% Food Service; 14% Hospitality/Lodging; 11% Commercial
- **Patron or staff illness:** 30% Healthcare; 25% Commercial; 18% Food Service; 11% Hospitality/Lodging
- **Negative publicity**: 29% Hospitality/Lodging; 23% Food Service; 17% Healthcare; 15% Commercial
- **Lawsuits/Litigation:**15% Hospitality/Lodging; 12% Healthcare**;** 11% Food Service; 10% Commercial
- **None of the above:** 29% Commercial; 15% Hospitality/Lodging; 15 % Healthcare; 13% Food Service

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

Pride levels are strong, with two-thirds (67%) of respondents overall being "extremely" or "very" proud of their business's cleanliness, hygiene and cleaning procedures – and the Hospitality/Lodging sector leads this category at 80%. Below are breakouts by industry that are "extremely" or "very" proud.

- **Hospitality/Lodging:** 80%
- **Food Service:** 69%
- **Healthcare:** 66%
- **Commercial:** 52%

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Demographics

45% of respondents to this survey identify as the "owner/operator/proprietor" while "general managers" make up 31% of respondents and "maintenance/operations/housekeeping managers" make up 6%. Breakout by industry is as follows:

- **Food Service:** 47% owner; 33% GM; 5% Maintenance manager; 5% Building manager; 1% Purchasing manager; 1% Supervisor; 1% CFO; 8% Other
- **Hospitality/Lodging:** 43% owner; 36% GM; 9% Maintenance manager; 4% Building manager; 1% Purchasing manager; 1% Supervisor; 1% Office manager; 5% Other
- **Commercial:** 58 % owner; 21% GM; 4% Maintenance manager; 9% Building manager; 3% Purchasing manager; 2% Supervisor; 1% CFO; 3% Other
- **Healthcare**: 30% owner; 35% GM; 7% Maintenance manager; 5% Building manager; 4% Purchasing manager; 1% Supervisor;2 % CFO; 4% Office manager; 12% Other

Respondents by Number of Employees and Decision-making role

Number of Employees:

- **1 – 10**: 30% Food Service; 40% Hospitality/Lodging; 54% Commercial; 31% Healthcare
- **11-50:** 34% Food Service; 17% Hospitality/Lodging; 18% Commercial; 17% Healthcare
- **51 – 100:** 11% Food Service; 10% Hospitality/Lodging; 8% Commercial; 11% Healthcare
- **101 – 1,000:** 9% Food Service; 21% Hospitality/Lodging; 13% Commercial; 21% Healthcare
- **1,001 – 10,000:** 9% Food Service; 7% Hospitality/Lodging; 4% Commercial; 13% Healthcare
- **Over 10,000:** 8% Food Service; 5% Hospitality/Lodging; 3% Commercial; 8% Healthcare

Decision-Making Role:

- **Myself**: 68% Food Service; 50% Hospitality/Lodging; 70% Commercial; 48% Healthcare
- **Another employee below me:** 4% Food Service; 16% Hospitality/Lodging; 18% Commercial; 17% Healthcare
- **Another employee at my level:** 12% Food Service; 18% Hospitality/Lodging; 6% Commercial; 14% Healthcare

- **Another employee above me:** 11% Food Service; 14% Hospitality/Lodging; 6% Commercial; 17% Healthcare
- **Other:** 5% Food Service; 2 % Hospitality/Lodging; 1% Commercial; 5% Healthcare

Respondents by Number of Employees by Age, Region and Gender

Age:

- **18 – 39:** 24% Food Service; 25% Hospitality/Lodging; 10% Commercial; 18% Healthcare
- **40 – 49:** 27% Food Service; 17% Hospitality/Lodging; 22% Commercial; 20% Healthcare
- **50 – 59:** 32% Food Service; 37% Hospitality/Lodging; 34% Commercial; 42% Healthcare
- **60+:** 18% Food Service; 21% Hospitality/Lodging; 33% Commercial; 21% Healthcare

Region:

- **Northeast:** 18% Food Service; 14% Hospitality/Lodging; 17% Commercial; 19% Healthcare
- **South:** 30% Food Service; 39% Hospitality/Lodging; 27% Commercial; 31% Healthcare
- **Midwest:** 25% Food Service; 15% Hospitality/Lodging; 26% Commercial; 19% Healthcare
- **West:** 28% Food Service; 32% Hospitality/Lodging; 30% Commercial; 31% Healthcare

Gender:

- **Male:** 52% Food Service; 52% Hospitality/Lodging; 56% Commercial; 37% Healthcare
- **Female:** 48% Food Service; 48 % Hospitality/Lodging; 44% Commercial; 63% Healthcare

Methodology

The study was conducted online from May 28-31, 2013. The sample consists of 408 managers of cleaning operations based in the United States from the following industries: Food Service (n = 101); Hospitality/Lodging (n = 100); Commercial (n = 105); and Healthcare (n = 102). Margins of error at a 95% confidence level would be +/- five percentage points for respondents from all industries combined, if conducted using a probabilistic sample; the margin of error would be larger within sub-groupings of the survey population. Throughout the results, total percentages may not add up to 100% due to rounding.

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