CONSUMER BEHAVIOR WHILE WASHING WORKWEAR AT HOME
OVERVIEW RESULTS 4 COUNTRIES

Presentation to the Project Group
December 9th 2012

1. Research objectives
2. Research design
3. Management summary
4. Summary by country
5. Detailed results overview 4 countries

Research objectives

The aim of this survey is twofold :

Understanding consumers ' behaviour while washing textiles at home

Understand the behaviour of consumers while washing textiles at home

= the full process of home washing and drying

= equipment used

= perception of hygiene aspects and environmental impact of home washing

= maintenance/transport of workwear

Identifying the most relevant arguments for industrial laundering

Defining **issues** that could be relevant for the households & assess **barriers** for making use of a professional solution

Validation of the **benefits that industrial laundering** can offer

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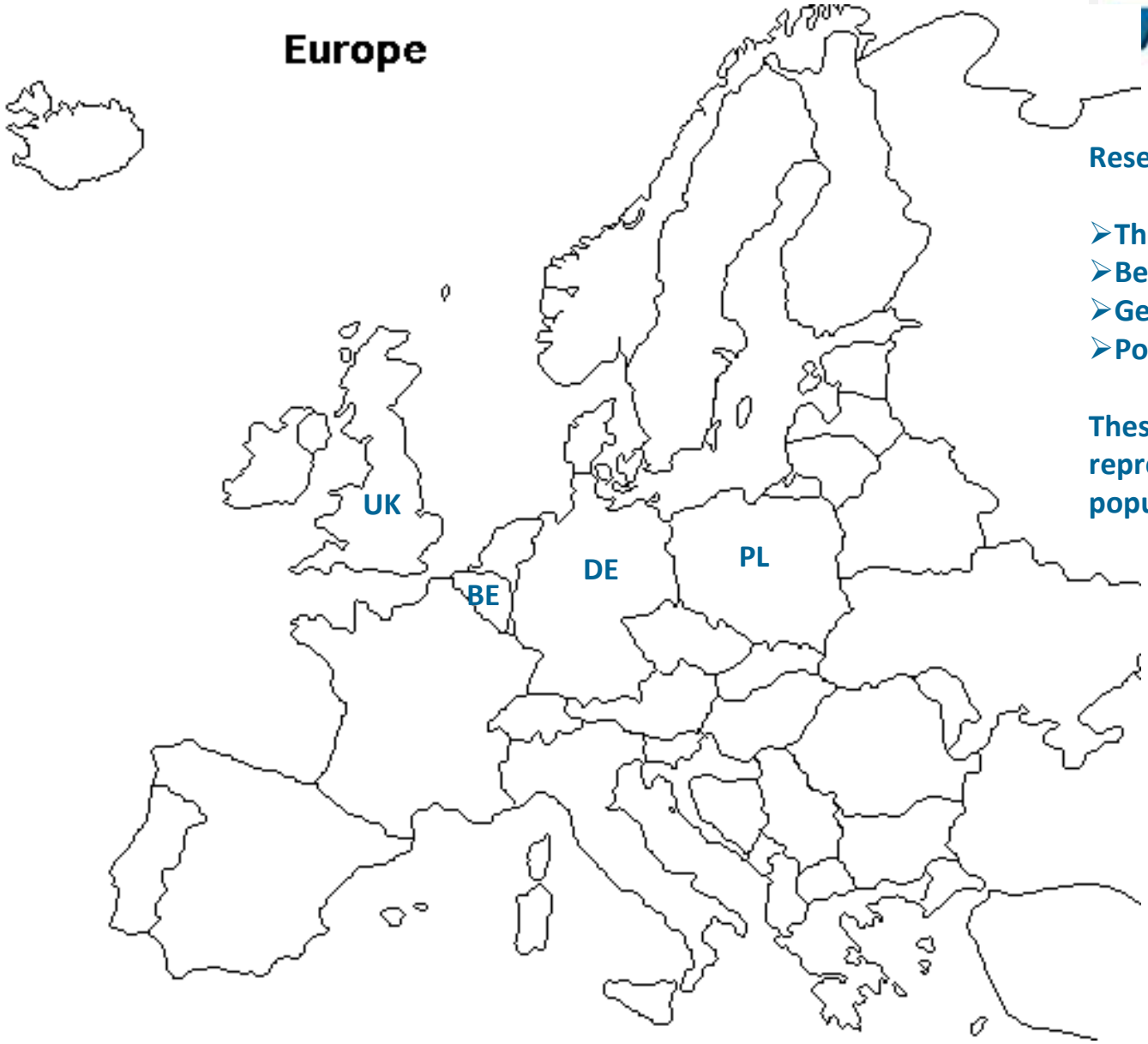
Methodology : 2 phases

Phase 1 : pilot phase in Belgium (July/August 2012)

- Test methodology and assure it delivers the expected output and insights
- Optimization of questionnaire : some slight modifications were carried out to the questionnaire after presentation of the Belgian results to the Project Group

Phase 2 : roll out in 3 other European countries (November 2012)

- The research was conducted on the GfK panel of individuals
- Method: online survey (+/- 15 minutes); mixed approach in Poland (online and face to face interviews) because of the lower online penetration
- Sample size : n = +/- 400 respondents per country



Research in 4 countries:

- **The UK**
- **Belgium**
- **Germany**
- **Poland**

These 4 countries represent 23% of the total population

Definition target group

The target consumer profile was defined as follows :

- persons who are responsible for washing in the household
- households where there is a household member who wears clothes during work he/she usually does not wear during leisure time and who process their workwear at home
- Different professional segments were covered including different types of workwear: corporate workwear, industrial workwear, food industry garments, medical uniforms…

Different professional segments : examples

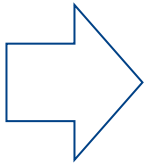
Sector	Examples
Construction	Bricklayer, builder, carpenter, chimney sweep, plasterer, unblocking drains to roofing, joiner, offshore pipe fitter…
Public services	Bus driver, firefighter, health and safety inspector, police officer, public transport, railway controller…
Healthcare/medical	Blood collection, care worker, nurse, healthcare assistant, paramedical, physiotherapist, ultrasonographer…
Engineering	Boat engine engineer, civil engineer, computer engineer, electrical engineer, microelectronic design, tyre fitter…
Food and beverage	Butcher, fast food assistant, food testing, food technologist, yoghurt production, bread baker, production line…
Retail/supermarket/store...	Baker, checkout operator, customer service advisor, shop assistant, warehouseman, assistant section manager…
Agriculture/horticulture	Farmer, freelance gardener, agricultural scientist, forestry lecturer, labourer, agricultural contractor…
Chemical/petrochemical	Industrial chemist, petrochemical polymers, water treatment operator, works in a chemical plant…
Road works	Road manager, tarmacing, highways, railway installer, asphalt repairer, road expert…
Fishery	Fisherman, fishing guide, fishmonger…

Topics of questionnaire

- Screening
- Equipment present in the household
- Usage of detergents
- Washing process
- Awareness of different features like ph, hardness, temperature…
- After the washing
- Maintenance of workwear, transport of workwear from home to workplace
- Attitude of employer
- Interest for an industrial laundry solution + perceived benefits & barriers to a professional solution
- General questions

1 **Research objectives**

2 **Research design**



3 **Management summary**

4 **Summary by country**

5 **Detailed results overview 4 countries**

3.3. Management summary

3.1. Reasons to wear workwear

3.2. Equipment available in the household

3.3. The use of detergents

3.4. Washing work wear

3.5. Attention points and understanding

3.6. Relation with the employer, satisfaction & employer involvement

3.7. Attitude & interest towards industrial washing solution

3.8. Recommendations

3.1. Reasons to wear workwear

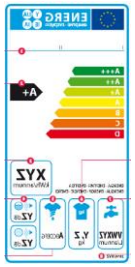
Overall, protection against getting dirty and the status of the job are the main reasons to wear work wear, followed by safety, hygiene and customer recognition.

Depending on the country 50 to 60% of employees also wears some kind of protective equipment (of which high visibility garments are the most common; 50% of PPE)

However some differences by country occur:

- Protection against getting dirty and hygiene are more important in Poland; this probably relates to a more blue collar sample in Poland (construction, road works, chemical sector)
- in Belgium 'legal obligation' is more often mentioned, probably related to a relative high share of the public services in the Belgian sample.
- wearing protective equipment is most frequent in Germany (7/10).

3.2. Equipment available in the household



- Most households use the **same washing machine** to wash workwear and private wear
- **Dryers** are present in almost 8 out of 10 Belgian households, compared to 6/10 in Germany and the UK; in Poland ownership of dryers is much lower (1/10) probably related to the housing situation and available space (72% is living in a studio/appartment)
- Possession of a **water softener** is relatively high in Germany (20%)
- Knowledge of the **energetic class** of the devices: 30 to 40% of the respondents is not able to indicate the energy class of their washing machine (up to 60 to 70% in the case of the dyer).
- **Age of equipment** : about 60% to 70% of the washing machine and dryers are less than 5 years old.
- Important **aspects when choosing for equipment**: energy class and price of the equipment, followed by the capacity and the brand

3.3. The use of detergents

On average, consumers report an **average monthly spent** which varies from 11,5€ (Poland & Germany) to 18,5 €/ month (Belgium)

Type of detergents used : beside detergents for the washing machine, wash softeners and stain removers are the most commonly used detergents.

We observe the following differences by country:

- Detergents for hand washing relatively more used in Poland (28%);
- Bleaching and whitening products more in the UK (27%) and Poland (33%);
- Colorfixator somewhat more used in Belgium (16%) and Poland (17%);
- Desinfecting products for the machine clearly more used in Germany (22%) and the UK (14%)

3.3. The use of detergents (ctd)

Detergent purchase criteria : effectivity is the most important criterium when purchasing detergents, followed by an interesting promotion, price, fragrance and the non-allergic aspect.

Some differences by country:

- Fragrance and non allergic aspect get a lower importance rating in the UK
- Brand: more care about the brand choice in Poland, less in Germany
- Eco-friendliness of detergents : more important in Germany and Poland (also be noted that 30 to 40% of the consumers perceive eco-friendly detergents as less efficient which probably hampers their further development)

3.4. Washing work wear

Washing the work clothes is a **weekly** activity: 80 to 90% indicates to wash their workwear at least once a week or more. In 2/3 of the cases, respondents report to do the washing of workwear separately of private wear.

In Poland, there is a higher fear for contamination of normal wear, workwear is more often sorted from and washed separately from the personal wash. As a consequence the frequency of washing workwear is somewhat less frequent in Poland.

The reverse is true for **the UK** where there is more washing of private wear and workwear together and less sorting in general.

3.4. Washing work wear (ctd)

Time spent at doing the laundry of workwear : between 1,5h (Belgium/Germany) and 2h per week (UK/Poland).

There is also a lower degree of **ironing** of the workwear compared to private wear, altough almost 80% of the respondents indicate to iron their workwear when necessary.

Timing of doing the laundry : almost 2/3 of the respondents report to usually do the laundry during the week. In Belgium, this is done relatively more after 10pm during the week because of reduced electricity rates.

In general, consumers have the idea they have a **fairly good use of the capacity** of their washing machine with a reported average fill of washing drum of 85%.

Transport of workwear : 50% just wears the work wear to work and back home; relatively more in the UK and lower in Poland (because the clothes are dirtier?, higher share of workers in the construction sector in Poland)

Drying : no significant difference in way of drying between private and workwear. More than 60% indicates to hang their workwear outside for drying.

3.5. Attention points and understanding

- **Temperature** is obviously the first attention point in all countries. There is also considerable interest and respect of the **care lable** (highest in Germany).

- **Contamination and dangerous products on the clothes** is clearly a concern among responsibles for washing in **Poland**.

- **Hardness of the water** is an issue in **Germany** (40%) which links to the higher penetration of water softener systems (20%) compared to the other countries

- Relatively higher **storage of the work wear at work** in in Poland (4/10) and in Germany (3/10)

- In general respondents claim a good understanding of the different washing programs of their machine, almost 2/3 choose washing programmes that save water.

- Exact **knowledge** of **water and electricity** consumption of domestic equipment is rather **poor**. Few people are aware of the **actual costs of electricity and water usage** and have difficulty to calculate the cost of laundry at home.

3.6. Relation with the employer/ satisfaction & employer involvement

In general, 7 out of 10 employees are **satisfied** with the agreement they have with their employer. In Belgium, the UK and Germany; 3/10 is very satisfied, 4/10 is satisfied

In Poland, only 1/10 is very satisfied, 5/10 is satisfied

Overall, the sectors with the highest satisfaction scores are the public and the chemical sector.

In Poland, almost 4 out of 10 employees receives **a financial compensation**; clearly higher than in the other countries (2/10)

There is a higher **involvement of the employers** in Germany and Poland ; in Germany 71% states that the employer gives recommendations concerning doing the laundry of workwear.

3.7. Attitude towards industrial washing
3.7. 1. Perceived advantages

Over all researched countries, about **40%** of the respondents is interested in a professional solution.

Most important benefits are time-saving, money saving and longer lifetime of the washing equipment.

In general , the interest for a professional solution is **highe**r :

- in the younger age groups
- if the employee is not satisfied with the current arrangement with the employer
- when the employee does not receive a financial compensation.
- in sectors where there is contact with dangerous substances like chemics, the healthcare/ medical sector and engineering.

3.7. 2 Perceived barriers and concerns

The most important concern in all the countries is that **the clothes could get lost** ; 53% have this concern.

43% thinks it is just comfortable to do their washing at home. This is relatively more important in the UK.

The concerns for contamination from other peoples' clothes and the fear that it will not be clean enough are relatively higher in the UK and Poland.

The proportion of consumers that fear that the clothes will be less clean is limited to 20% (but a bit more important in Poland).

3.8. Recommendations

Consumers ' behaviour while washing textiles at home

Arguments for industrial laundering

Based on the results on consumer behavior while washing textiles at home, we tried to list a number of arguments for industrial laundering :

1) Benefits that are **already present** in consumers' current perception and needs

2) **Potential** arguments and aspects that could be developed to leverage the equity of a professional laundry solution for workwear

(to be reviewed after discussion with the project group)

3.8.1. Benefits covering current needs & concerns

Communicate on the **time- and money saving** aspect. They are relevant to the consumer.

Save time :

- 1,5 to 2h loss of employees (spare) time on week base

-Younger generations : more open for a professional solution/ convenience minded!

- For the majorityof households, workwear is already in a separate loop (washed separately)

Save money

- Household spent on detergents : between 11 and 18€ per month

- Reduced water & electricity consumption (yet unknown by the consumer)

- Outsourcing will benefit the lifespan of domestic equipment

Reassure that their clothes will be more clean and hygienic

Their clothes

- will be washed in the right way

- will not get contaminated by other peoples clothes

- No risk for contamination of private clothes

Benefits covering current needs & concerns

Communicate the **performance of the logistic system,** look for **flexible solutions**	Offer trust on the fact that their personal workwear will return and not be lost Almost 1 out of 3 respondents think it will be difficult to organize in their case
Counter the 'aggressive' perception of professional laundry services and	- Communicate about the detergents that are used? - Pay attention towards the non-allergenic aspects of the products that are used
Take into account consumer preferences regarding **sensory aspects :** the **smell** and the **feel** of clean workwear	- Smell and softness of the clothes, remain next to hygiene and cleanness, very important for the consumer

Benefits covering current needs & concerns

Show **ecological concern** and communicate on the **environmental aspects**

Although environmental aspects are less of a driver, we think it is useful to communicate on green cleaning as this could benefit to a less agressive perception of professional laundry services and taking into account the global trend for sustainability.

3.8.2 . Opportunties : potential aspects to be developed towards consumer and employer

Educate on hygiene and cleanness:	Consumers' knowledge about what hygiene means is limited;the knowledge of employees about bacteria/ possible contamination is rather low - 1/3 has doubts if they wash their clothes in the right way -Little awareness about possible contamination when ironing
Point out the consequences of washing in a non controlled environment	40% indicates to hang and dry the work wear outside; no idea about contamination from outside when not washed in a controlled environment
Make the consumer /employer aware that PPE needs correct cleaning	Seen the importance of PPE and the high share of high visibility equipment; it seems indicated to educate the consumer and address the ignorance of the loss of inherent qualities if – expensive - PPE is not cleaned correctly

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Also : tailor the message

By market

E.g. ecological concern more present in Germany

By sector : different sectors have different needs

Chemical/ petrochemical: fear for contamination

Healthcare/ medical: contamination risk and higher profile/ time saving

Engineering: higher profiles/ time saving

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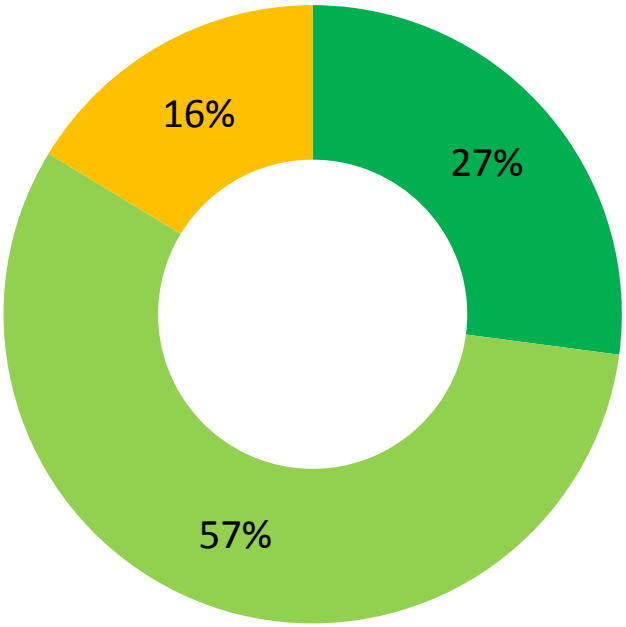
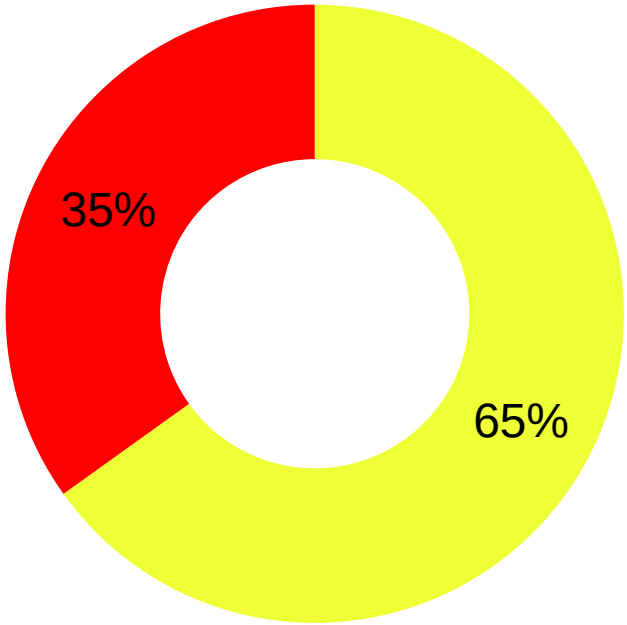
Belgium

Population: 10.839.000
Number of households: 4.569.000
Size of the household: 2,4
Internet penetration : 73%

Sample composition by age language & gender

BE





18-34 35-54 55 or more

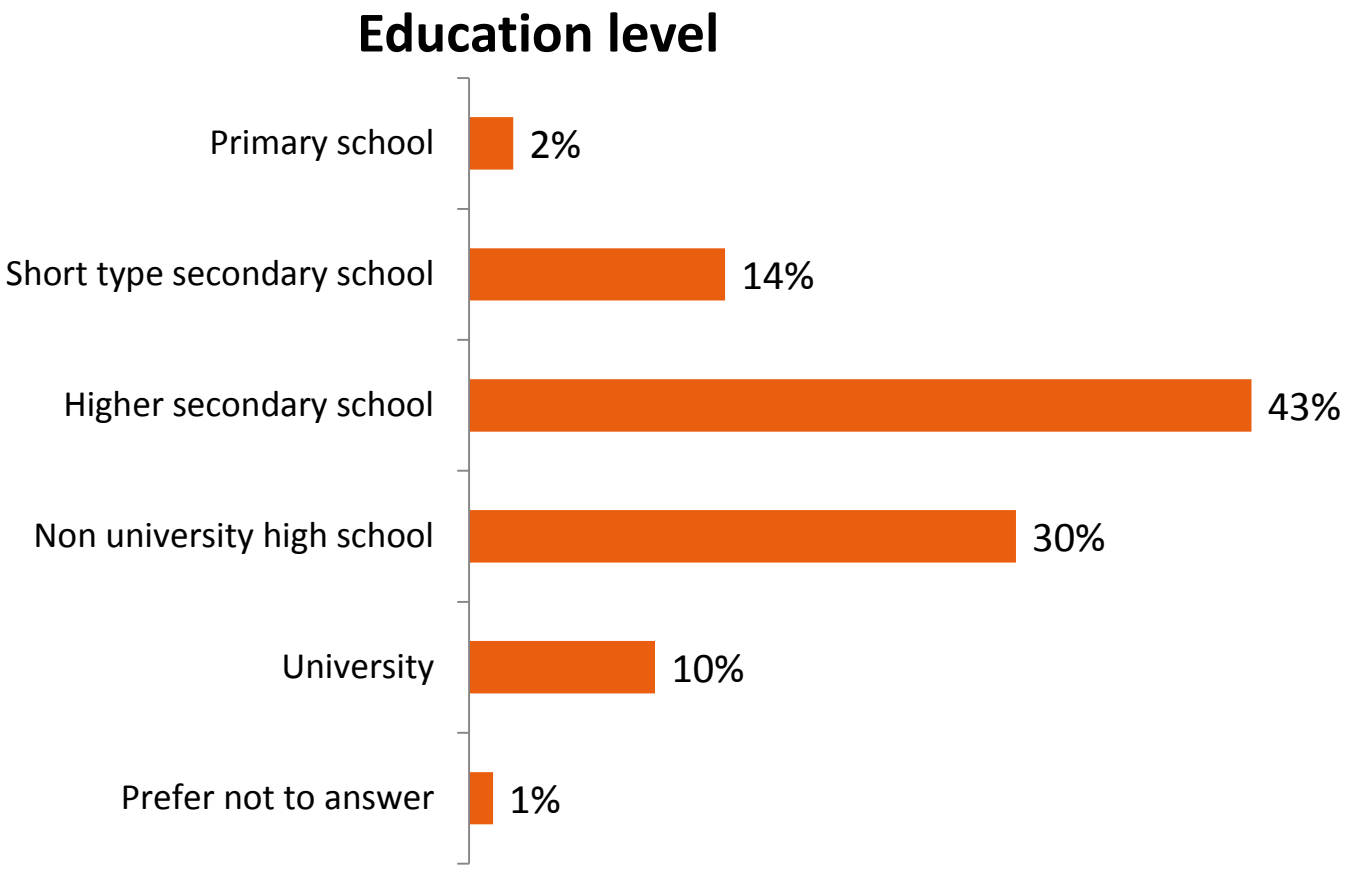
NL FR

Men Women

Base n= 459

Sample composition : education

BE



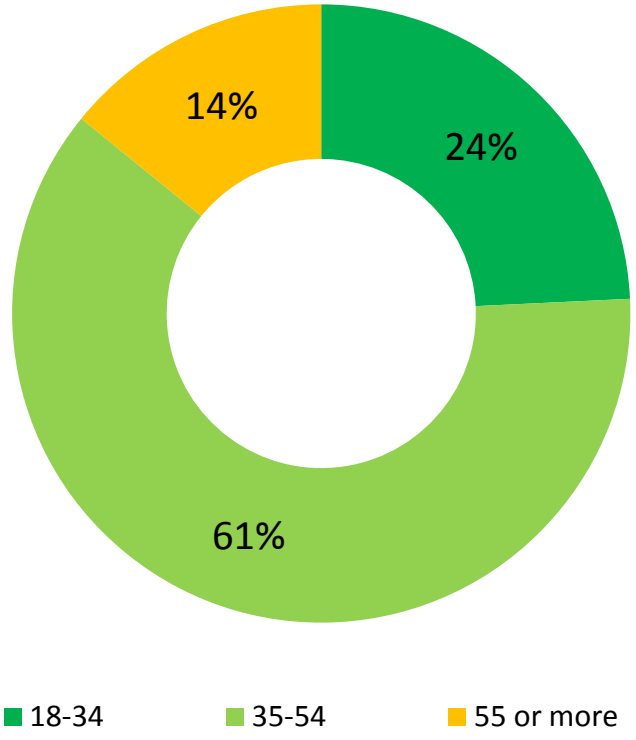
Base n= 459

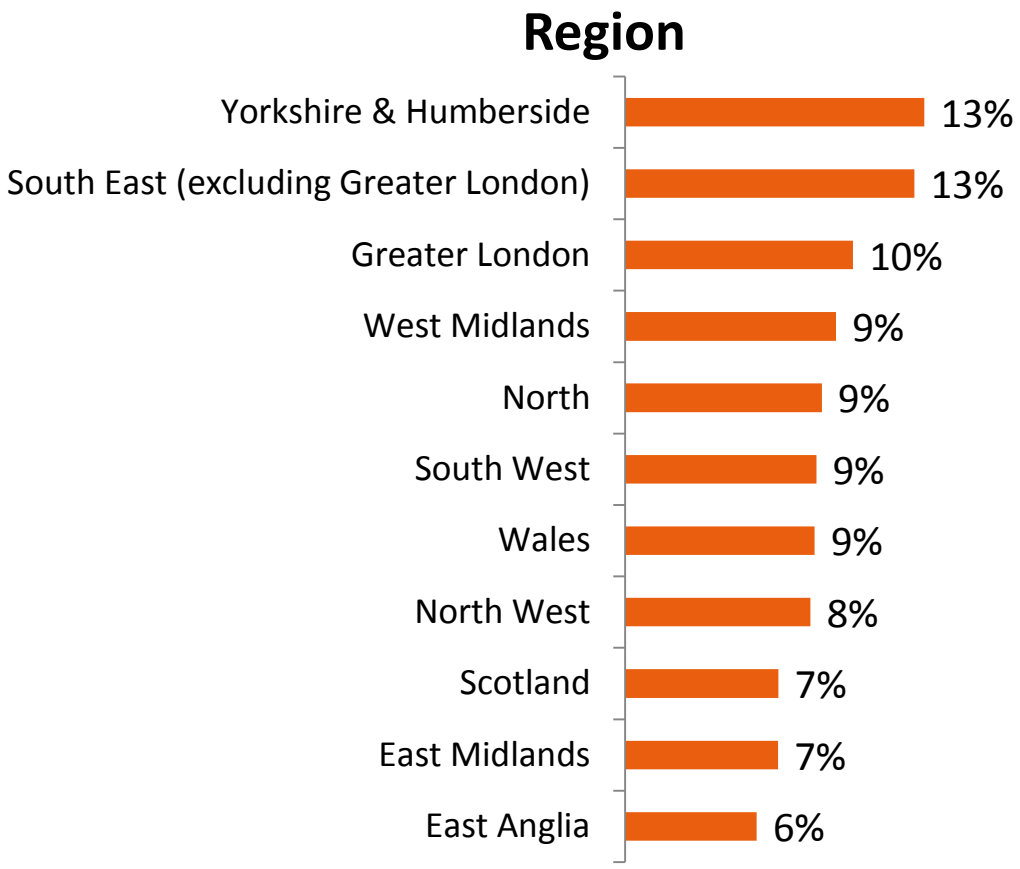
The United Kingdom

Population: 61.792.000
Number of households: 26.711.000
Size of the household: 2,3
Internet penetration: 76%

Sample composition by age, region & gender

UK

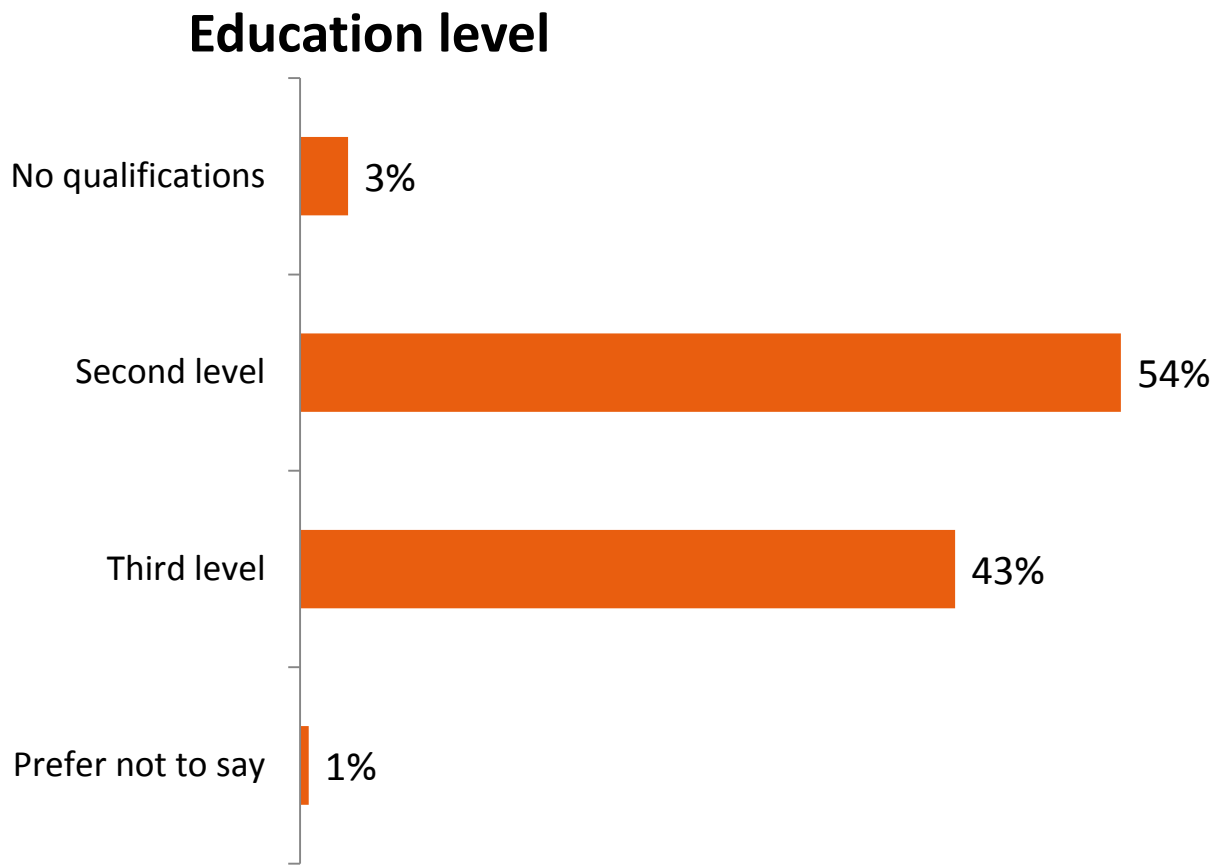




Base n=407

Sample composition : education

UK



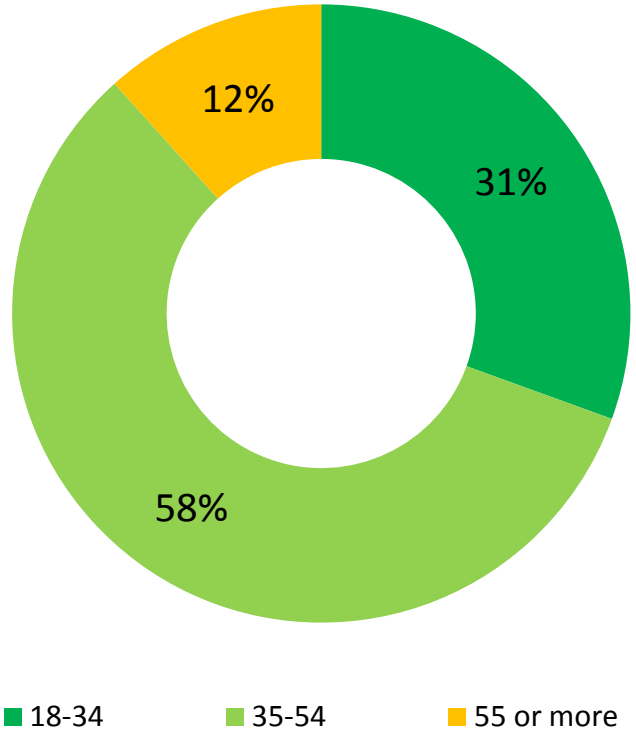
Base n=407

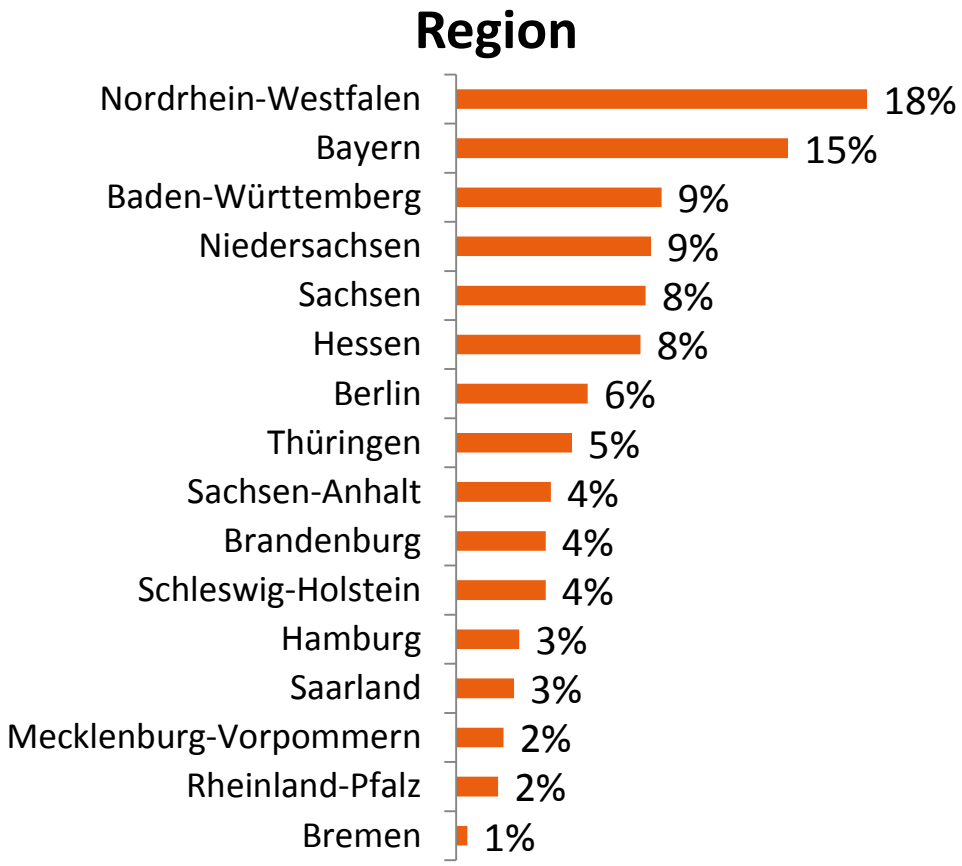
Germany

Population: 81.802.000
Number of households: 40.188.000
Size of the household: 2,0
Internet penetration : 74%

Sample composition by age, region & gender

DE





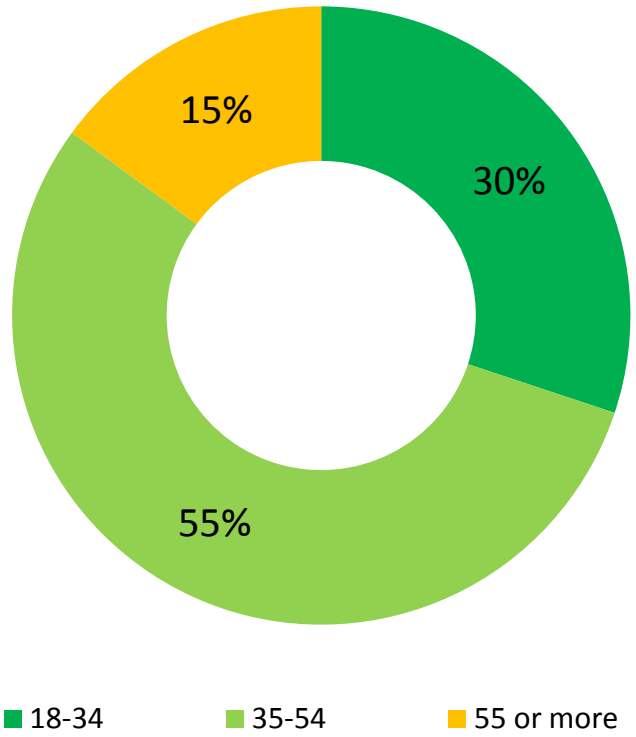
Base n= 429

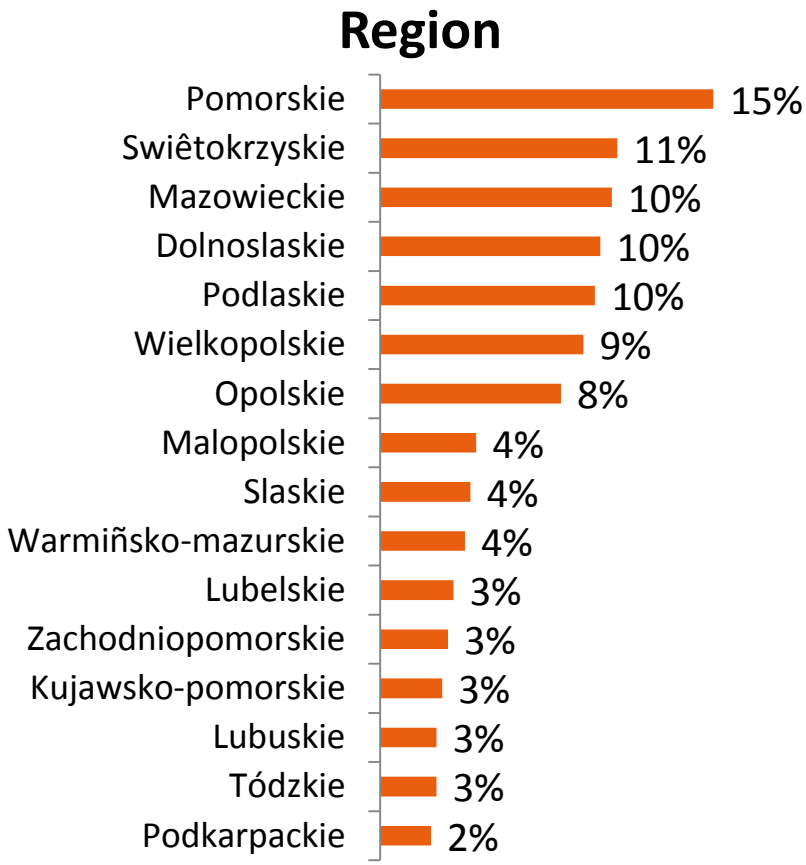
Poland

Population: 38.187.000
Number of households: 13.408.000
Size of the household: 2,8
Internet penetration: 53%

Sample composition by age, region & gender

PL

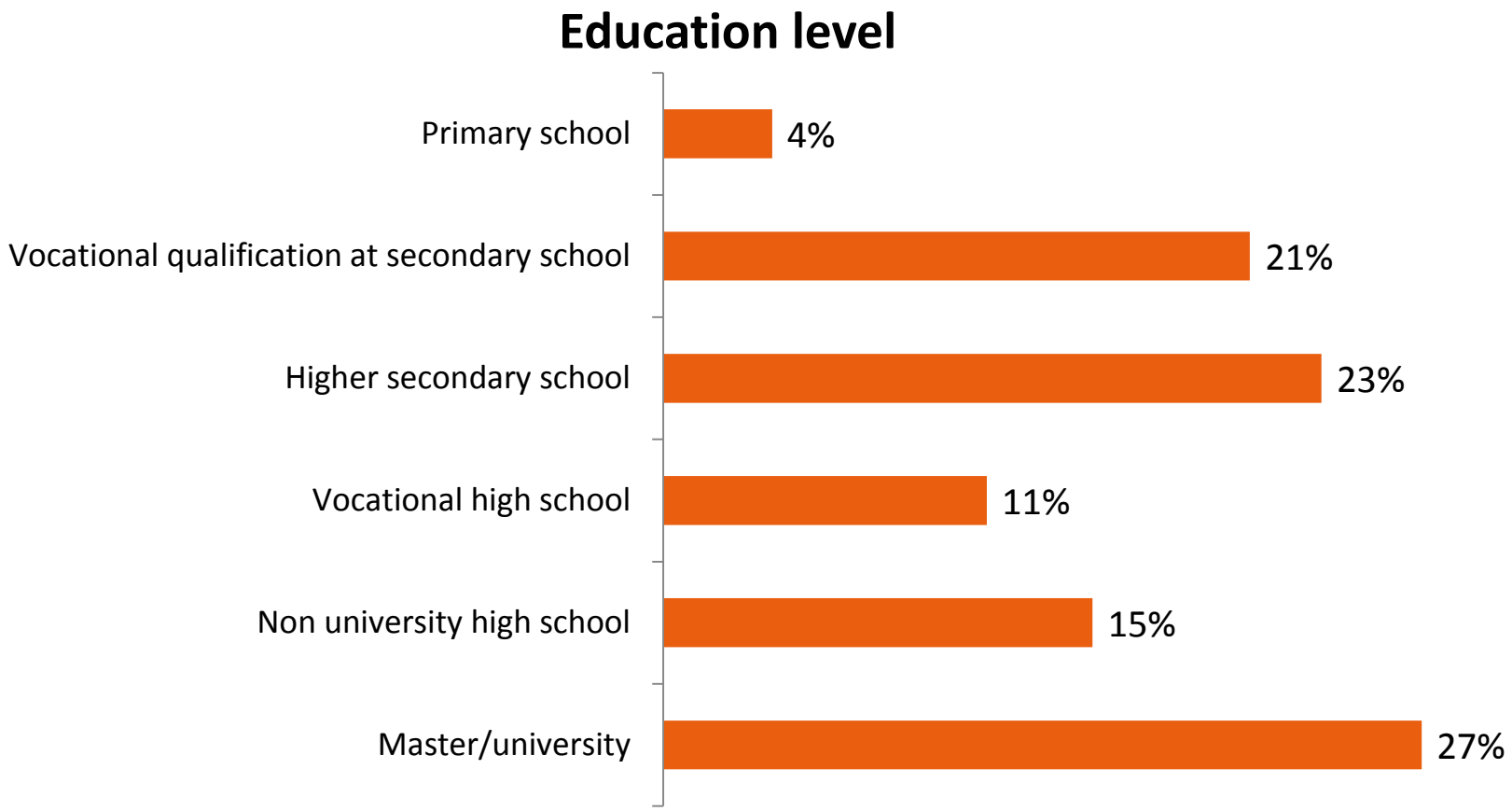




Base n=400

Sample composition : education

PL



Base n=400

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Screening

Who in the household wears workwear

	BE	UK	DE	PL	Average
Myself	44%	66%	62%	56%	57%
My partner	55%	41%	46%	42%	46%
My child(ren)	15%	9%	8%	9%	10%
Somebody else	3%	4%	4%	6%	4%

S3. Who in the household wears workwear?

How many people do wear workwear in your household?

	BE	UK	DE	PL	Average
1 person	88%	81%	82%	79%	83%
2 persons	12%	18%	17%	20%	17%
3 persons	1%	1%	1%	2%	1%

Washing workwear at home

	BE	UK	DE	PL	Average
Yes I/we do the laundry of all workwear at home	67%	**92%**	75%	85%	80%
Yes partly at home, partly at the employer	10%	5%	12%	12%	10%
No, I bring it to the dry clean	2%	1%	3%	1%	2%
No , the employer takes care of all the laundry of the workwear	**20%**	2%	10%	2%	9%

92% wash the work wear at home in the UK; relatively high compared to other countries

S4 Do you wash the workwear at home?

Reasons to wear workwear

	BE	UK	DE	PL	Average
Protection against getting dirty	47%	45%	47%	**65%**	51%
Fit with status of the job	47%	52%	56%	35%	48%
Safety	37%	44%	45%	52%	45%
Hygiene	38%	35%	38%	**65%**	44%
Customer recognition	33%	39%	**44%**	18%	34%
For the benefit of the company image	30%	**41%**	32%	17%	30%
Legal obligation	**39%**	21%	29%	27%	29%
Other, specify	2%	3%	2%	1%	2%

S5 What is the reason for wearing workwear? More than one answer possible

What kind of workwear?*

	UK	DE	PL	Average
Trousers	73%	73%	62%	69%
Polo/T-shirt	49%	58%	45%	51%
Jacket	39%	**54%**	32%	42%
Shirt	39%	36%	43%	39%
Fleece	37%	17%	33%	29%
Overall	26%	14%	29%	23%
Coat	19%	9%	**34%**	21%
Other	18%	21%	5%	15%

* Question added after the pilot in Belgium

S5b Can you please give a short description of the workwear?

Protective equipment

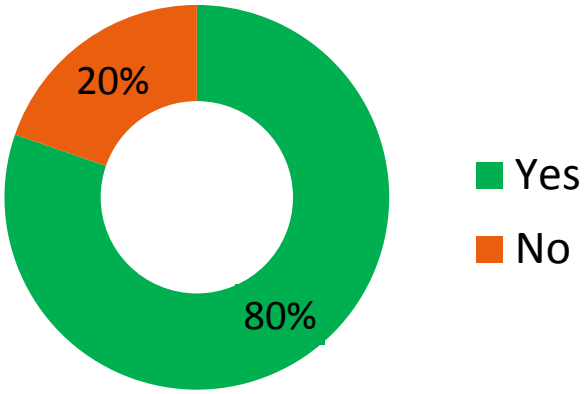
	BE	UK	DE	PL	Average
High visibility garments	20%	38%	**42%**	22%	31%
Protection against chemicals	7%	12%	12%	**18%**	12%
Heat and flame retardant	8%	12%	12%	9%	10%
Anti-static garments	5%	9%	9%	10%	8%
Protection for welding	5%	6%	7%	9%	6%
Other protective equipment	22%	19%	26%	8%	19%
Wear PPE	**48%**	**59%**	**69%**	**53%**	**57%**
Don't wear PPE	52%	41%	31%	47%	43%

S6_1 Do you/this person wear(s) any protective equipment?

PPE Cleaning at home : results Belgium

BE

Cleaning protective equipment?



Do you also wash or clean this protective equipment at home??

Which sector do they work?

	BE	UK	DE	PL	Average
Construction	13%	11%	12%	**24%**	15%
Public services	**22%**	11%	10%	11%	14%
Healthcare/medical sector	11%	15%	15%	10%	13%
Engineering	13%	11%	**16%**	4%	11%
Food and beverage sector	10%	9%	8%	9%	9%
Retail/supermarket/store...	6%	**12%**	9%	9%	9%
Agriculture/horticulture	3%	4%	5%	6%	5%
Chemical/petrochemical sector	3%	3%	2%	8%	4%
Road works	2%	2%	2%	5%	3%
Fishery	1%	1%	1%	1%	1%
Other : specify	15%	21%	20%	24%	20%

S6 In what sector do you/ this person work?

Equipment available in the household

Equipment available in the household

	BE	UK	DE	PL	Average
Washing machine (*)	98%	99%	99%	99%	99%
Flat iron	97%	**77% (*)**	93%	96%	91%
Dryer	77%	61%	61%	**9%**	52%
Water softener	14%	9%	**20%**	10%	13%

(*) Sample was screened on washing machine ownership

(*) Probably this is partly reflecting a wording issue : after the field, we found out that the term 'flat iron' is quite an old phrase, part of the younger respondents may not have had an idea what it is referring to. This links with the observation that 'Flat iron' ownership increases with age.

W1 Which of the following devices/machines do you possess at home ?

Awareness of the energetic class of the washing machine

Scale:	Precoded	Open	Open	Open
	BE	UK	DE	PL
A+++	19%	3%	8%	3%
A++	25%	2%	18%	17%
A+	26%	15%	18%	22%
A	11%	26%	23%	29%
B	2%	6%	3%	2%
C	0%	4%	1%	0%
D to G	0%	1%	0%	0%
Don’t know	17%	**44%**	**28%**	**27%**

When asked in a more open way, respondents have more difficulty to indicate the exact energy class of their equipment .

W2 Which energetic class is your machine (e.g. A+...)?

Awareness of the energetic class of the dryer

Scale:	Precoded	Open	Open	Open
	BE	UK	DE	PL
A+++	12%	1%	3%	0%
A++	16%	1%	7%	1%
A+	24%	5%	10%	1%
A	15%	13%	13%	2%
B	8%	8%	8%	0%
C	2%	6%	3%	0%
D to G	1%	1%	1%	0%
Don’t know	22%	**66%**	**57%**	**95%**

When asked in a more open way, respondents have more difficulty to indicate the exact energy class of their equipment .

W2 Which energetic class is your machine (e.g. A+...)?

Age of washing machine

	BE	UK	DE	PL	Average
Less than 1 year	11%	15%	**22%**	8%	14%
1 to 4	45%	57%	45%	45%	48%
5 to 10	35%	20%	24%	37%	29%
More than 10	7%	5%	9%	9%	8%
Don’t know	2%	4%	1%	2%	2%

W2b How old is your equipment?

Age of dryer

	BE	UK	DE	PL	Average
Less than 1 year	8%	13%	20%	26%	17%
1 to 4	41%	55%	44%	34%	44%
5 to 10	34%	20%	26%	24%	26%
More than 10	**16%**	10%	8%	11%	11%
Don't know	2%	3%	2%	5%	3%

Only 9%
Small base observation

W2b How old is your equipment?

Important + most important aspects of washing machine

	BE		UK		DE		PL		Average	
	Imp.	Most imp.	Imp.	Most imp.	Imp.	Most imp.	Imp.	Most imp.	Imp.	Most imp.
The price	78%	33%	**86%**	**48%**	74%	22%	75%	27%	78%	33%
The energy class (A+++,A++, B, C, ...)	**87%**	**50%**	56%	14%	**87%**	**58%**	79%	44%	77%	42%
The capacity of the wash drum	51%	6%	69%	18%	60%	6%	53%	13%	58%	11%
The brand	35%	7%	37%	6%	35%	6%	**53%**	8%	40%	7%
The eco-friendliness	30%	2%	30%	3%	**49%**	3%	21%	1%	33%	2%
The size of the machine	16%	1%	20%	8%	28%	4%	**39%**	8%	26%	5%
Other : specify	2%	1%	6%	3%	1%	1%	1%	0%	3%	1%

W3 Which of the following aspects are decisive/important when buying a new device?
If more than one : Which is most decisive/important?

Important aspects of dryer

	BE		UK		DE		PL		Average	
	Imp.	Most imp.	Imp.	Most imp.	Imp.	Most imp.	Imp.	Most imp.	Imp.	Most imp.
The energy class (A+++,A++, B, C, ...)	**83%**	**54%**	51%	18%	**82%**	**62%**	63%	47%	70%	45%
The price	68%	32%	**77%**	**50%**	59%	22%	71%	24%	69%	32%
The capacity of the wash drum	37%	6%	**52%**	17%	41%	5%	42%	11%	43%	10%
The brand	22%	6%	26%	3%	28%	8%	**47%**	5%	31%	6%
The size of the machine	14%	2%	39%	8%	23%	2%	**45%**	13%	30%	6%
The eco-friendliness	21%	1%	24%	4%	**37%**	2%	34%	0%	29%	2%

W3 Which of the following aspects are decisive/important when buying a new device?
If more than one : Which is most decisive/important**?**

Capacity of the wash drum : 6 or 7 kg

	Average capacity
UK	7,1 kg
DE	6,4 kg
PL	6,0 kg

W3b Are you aware of the drum capacity (in kg) of your washing machine?

Workwear/ private wear: is the same washing machine used ?

Washing machine	BE	UK	DE	PL	Average
Always the same	98%	91%	93%	90%	93%
Sometimes another	2%	5%	5%	9%	5%
Mostly another	1%	4%	2%	2%	2%

W4 Do you use the equipment for your workwear as for your private wear ?

Workwear/ private wear: is the same dryer used ?

Dryer	BE	UK	DE	PL	Average
Always the same	97%	89%	92%	84%	91%
Sometimes another	2%	7%	6%	**11%**	7%
Mostly another	1%	4%	2%	**5%**	3%

W4 Do you use the equipment for your workwear as for your private wear ?

Products & detergents

Which type of products used

	BE	UK	DE	PL	Average
Detergents for washing machines	87%	88%	88%	95%	90%
Wash softener	**76%**	50%	68%	**78%**	68%
Stain remover	60%	59%	52%	60%	58%
Products for delicate fabrics	40%	22%	**51%**	34%	37%
Whitening / bleaching products	18%	**27%**	11%	**33%**	22%
Detergents for hand washing	14%	18%	16%	**28%**	19%
Desinfecting /sanitiser machine	5%	14%	**22%**	6%	12%
Colorfixator	**16%**	8%	4%	**17%**	11%
Color restorer	8%	11%	8%	10%	9%
Other : specify	1%	2%	5%	1%	2%

D1 What types of washing products do you use?

Importance of purchase criteria for detergents (top 2 box)

% fairly/very important

	BE	UK	DE	PL	Average
Efficiency	93%	82%	91%	86%	88%
The price	75%	78%	69%	80%	76%
The fragrance	75%	**57%**	76%	81%	72%
An interesting promotion	78%	66%	64%	72%	70%
Non-allergenic aspects	70%	**48%**	69%	77%	66%
The brand	50%	58%	**40%**	**73%**	55%
Eco-friendliness	44%	37%	**56%**	**64%**	50%
Biological ingredients	30%	42%	42%	54%	42%

D2 What are important criteria for choosing a detergent? (5-point-scale)

Statements about the usage of detergents

Scale:	Multi	Yes/No	Yes/No	Yes/No
	BE	UK	DE	PL
I use the same detergents for workwear as for my private clothes	71%	86%	87%	79%
I use less detergent for a smaller wash load	52%	80%	87%	80%
I use the measurement beaker	48%	72%	77%	77%
I measure the amount of powder in my wash	38%	76%	70%	79%
I use different detergent dosage depending on the soil quantity	43%	64%	77%	78%
I follow the recommendations of the manufacturer of the machine	12%	**44%**	**76%**	65%
I adhere to the dosing indicated on the packaging	22%	52%	51%	61%
Eco-friendly detergents are less efficient	9%	40%	**30%**	41%
I follow the recommendations of my employer	2%	29%	43%	45%
I use more detergents on low-temperature	3%	23%	17%	**34%**

D4 Some statements about the usage of detergents.

Washing process

When do you wash workwear?

	BE	UK	DE	PL	Average
When it is required	44%	50%	52%	**79%**	56%
On a regular basis	65%	62%	69%	**29%**	56%
Other	4%	2%	4%	1%	3%

WP1 When do you wash workwear?

How many pieces of workwear in an average washing ?

	Pieces of workwear
UK	5
DE	14
PL	4

(respondents included socks and underwear in Germany)

WP2 How many pieces of workwear do you wash at an average washing?

Workwear washed together or separate to personal wash

	BE	UK	DE	PL	Average
Always separately	39%	28%	39%	**60%**	42%
Most of the time separately	23%	25%	31%	23%	26%
Most of the time together	20%	23%	16%	10%	17%
Always together	18%	**25%**	14%	8%	16%

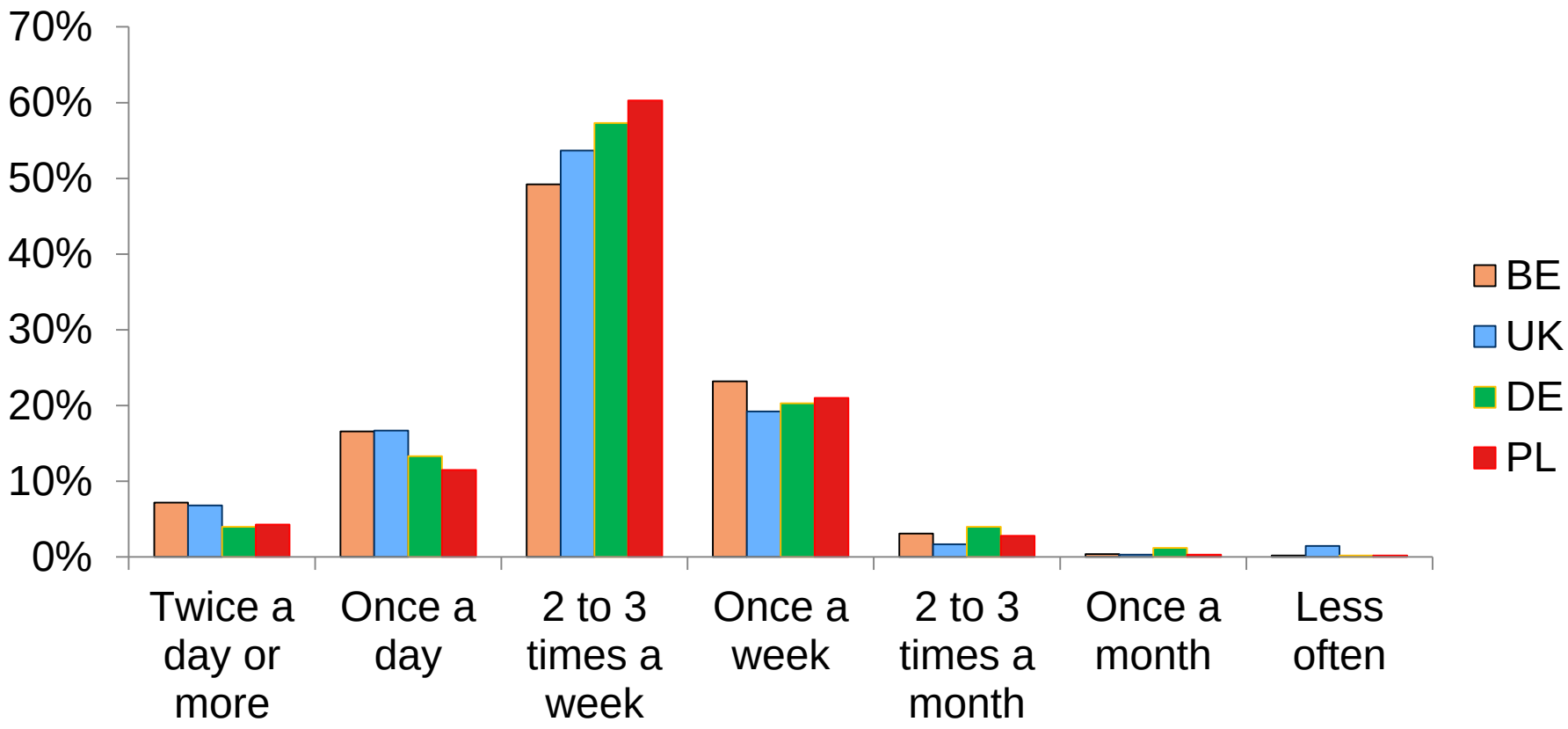
WP3 Do you wash workwear together or separate to your personal wash?
Base n=

Sorting the workwear

	BE	UK	DE	PL	Average
Always, consequently	42%	38%	38%	**72%**	48%
Only if the workwear is very dirty	39%	51%	33%	46%	42%
Because I am afraid that my workwear can spoil my private clothes	10%	10%	16%	**73%**	27%
Because I am afraid that my workwear can contaminate my private clothes	4%	14%	3%	**75%**	24%
Because the employers asks to do this	0%	3%	2%	14%	5%
Other, specify	5%	4%	9%	5%	6%

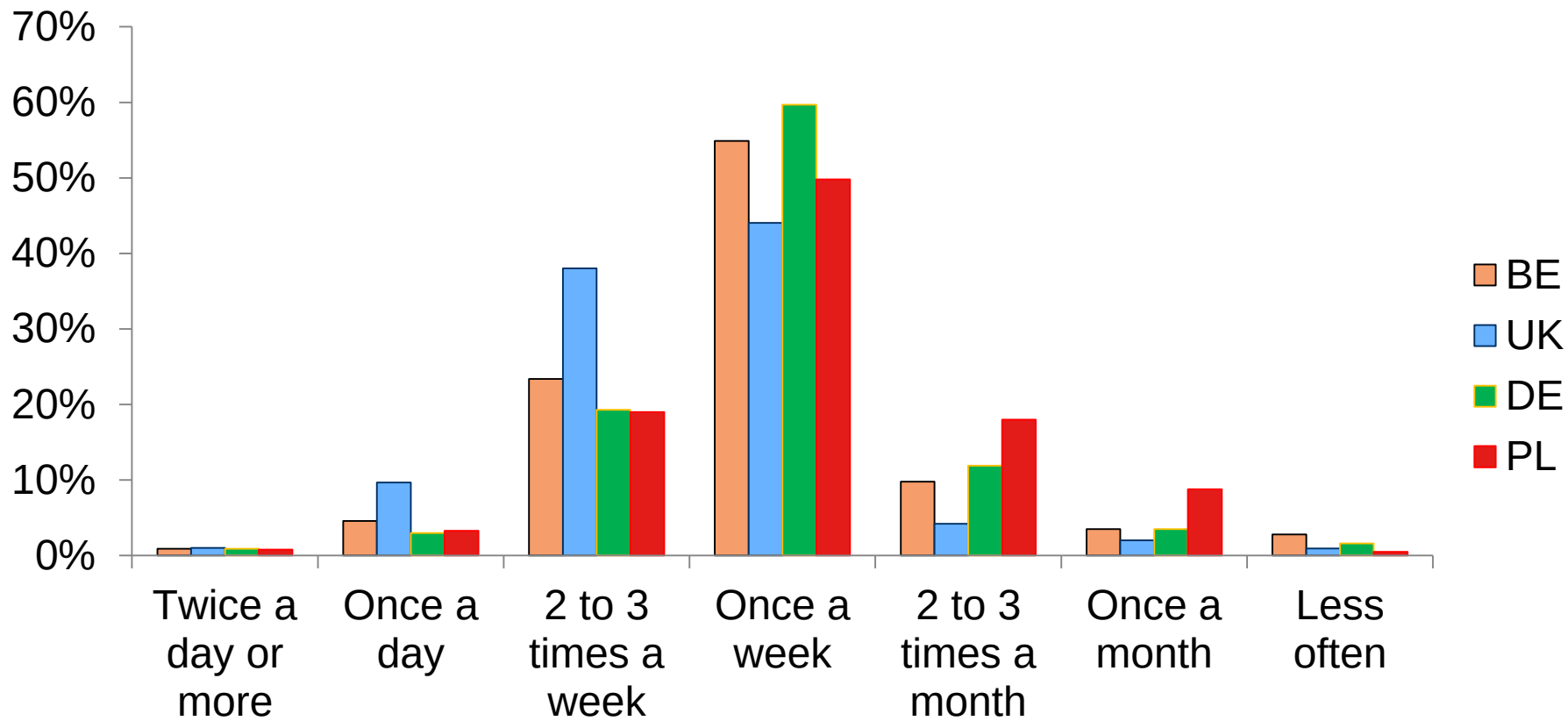
WP4 You mentioned to sort workwear from normal clothes. Do you do this...

Frequency of laundry: private wear



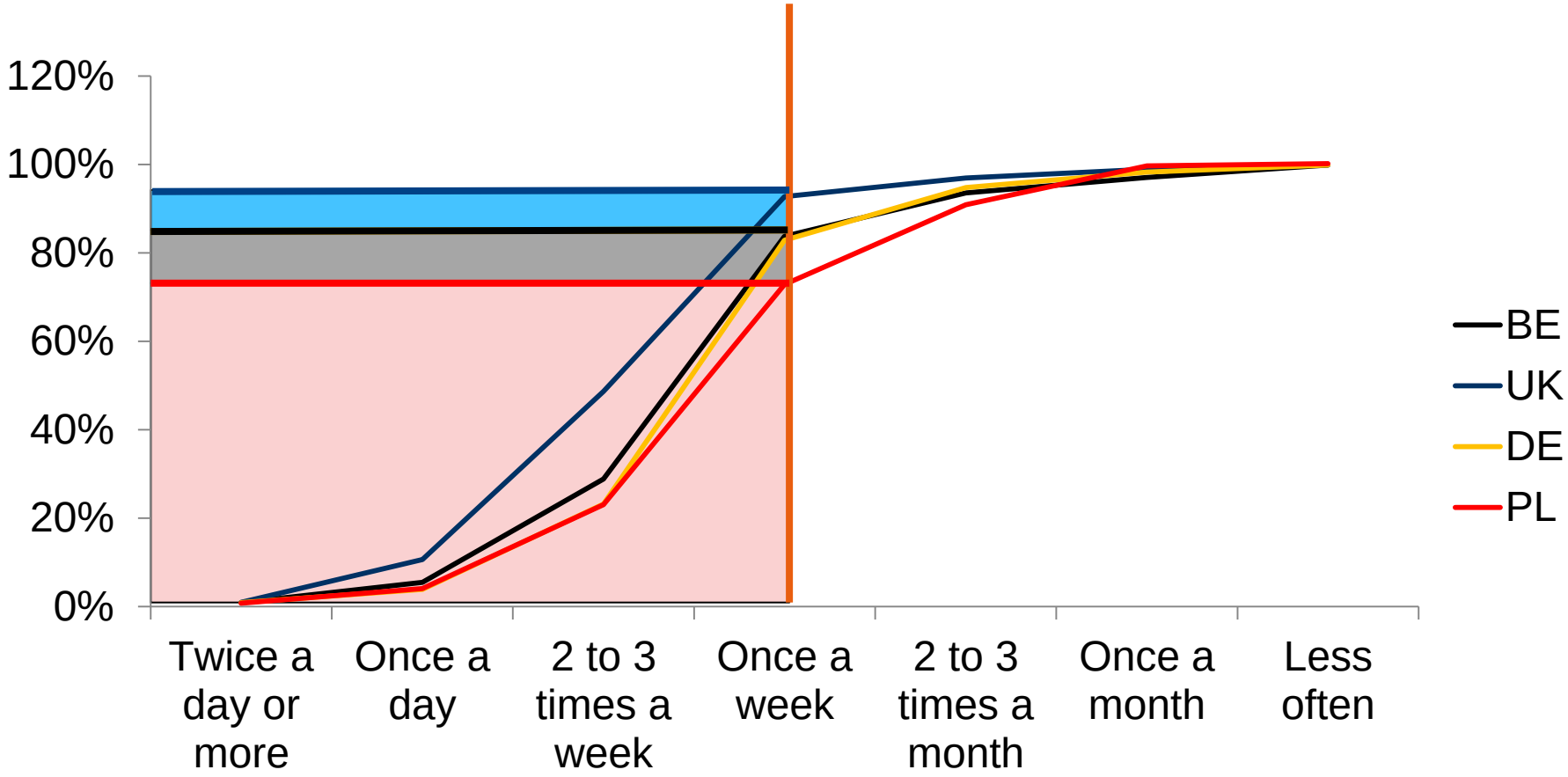
WP5 If you look at a typical week / month, how often do you do the laundry in your family?

Frequency of laundry: workwear



WP5 If you look at a typical week / month, how often do you do the laundry in your family?

Frequency of laundry: workwear



WP5 If you look at a typical week / month, how often do you do the laundry in your family?

When do they do the laundry?

	BE	UK	DE	PL	Average
In the week during the day	39%	54%	54%	61%	52%
In the week-end	32%	26%	34%	31%	31%
In the week at night (after 10 pm)	**23%**	15%	8%	7%	13%
Other, specify	6%	6%	4%	2%	5%

WP6 When do you usually do the laundry ?

Ironing : workwear versus private clothes?

	BE	UK	DE	PL	Average
Yes always: private clothes	**53%**	45%	**29%**	41%	**42%**
Yes always: workwear	49%	40%	32%	**24%**	36%
Partly: private clothes	31%	20%	41%	39%	**33%**
Partly: workwear	19%	17%	25%	18%	20%
When necessary: private wear	13%	27%	21%	18%	20%
When necessary: workwear	15%	24%	18%	33%	23%
Never: private clothes	3%	9%	9%	2%	6%
Never: workwear	17%	20%	24%	24%	**21%**

WP7 Do you iron your laundry: private wear?

UK : workwear more close to private?

Time/week spent on doing the laundry

Average time	Workwear
BE	1h 31m
UK	1h 58m
DE	1h 37m
PL	2h 10m

WP8 Overall, in a typical week, how much time do you spend on doing the laundry ? How long does it take to sort, to iron, to fold?

Budget spent by month on detergents

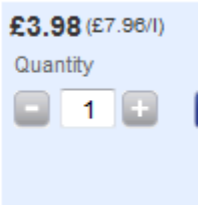
	Estimated spent by month
BE	18.42€
UK	13.39€
DE	11.86€
PL	11.28€

Probably related to price level/retail situation in Belgium; See next slide

WP9 Can you give an estimation about the amount of money you spend on detergents in an average month?

Example

Vanish Oxi Action Pre Wash Spray 500Ml



Tesco /UK 4.89 €

VANISH oxi action spray 500 ml

KRACHTIGE VLEKKENREINIGER VOOR TAPIJT EN TEXTIEL. 500ML OXI SPRAY VANISH 37930

Aanmelden om artikel aan een persoonlijk lijstje toe te voegen

Extra
-20,00%
vanaf 2 st

€ 6,12/st

€ 12,24 / l

1 st aanbevolen hoeveelheid

0 stuks

Colruyt /Belgium 6,12 €

+ 25%

Statements about washing

Scale:	Multi	Yes/no	Yes/no	Yes/no
	BE	UK	DE	PL
I read the washing instructions on the clothes when washing the clothes for the first time	61%	77%	**83%**	69%
I do not completely fill the wash drum but I leave some space	55%	**80%**	64%	72%
I always load the washing machine as full as I can	34%	37%	45%	31%
Washing laundry is really a chore	14%	**45%**	**47%**	29%
Each time , I check the washing instructions on the clothes again when washing the clothes	11%	25%	18%	**38%**

WP10 Some statements about washing. When washing...

Average fill of the wash drum

	Estimated average use of capacity
BE	87%
UK	84%
DE	87%
PL	83%

WP11 Overall, looking at the way you use your washing machine, can you estimate to which degree you use the capacity of your machine (in terms of average fill of the wash drum) assuming 100% = full capacity?

How to transport workwear to and from the work place

	BE	UK	DE	PL	Average
Wear the workwear travelling to and from work	53%	**71%**	56%	18%	50%
Bring it in the car	20%	15%	8%	**62%**	26%
Bring it in a bag	22%	13%	**33%**	19%	22%
Other	5%	2%	4%	1%	3%

WP12 How do you /other household member transport the workwear to or from the work place usually?

Some statements about the sorting of laundry

Scale:	Multi	Yes/No	Yes/No	Yes/No
	BE	UK	DE	PL
I sort whites from colours	79%	85%	90%	92%
I sort dark colours and light colours	69%	73%	91%	88%
I sort delicates from other fabrics	61%	**66%**	85%	82%
I sort accordingly to the temperature	49%	**47%**	79%	72%
I separate the colours from the black wash	48%	**51%**	66%	78%
I separate the towels and linen from the rest	42%	**52%**	67%	75%
I usually separate workwear from normal clothes	37%	**50%**	62%	**81%**
I sort cotton/linen separately from other clothes	20%	**31%**	38%	**66%**
I sort based on how dirty the laundry is	17%	41%	34%	**57%**
I sort protective equipment from the rest	4%	31%	**9%**	58%
I do not sort, I wash everything together	2%	**22%**	14%	16%
I sort in another way	1%	9%	6%	**24%**

WP13 How do you usually sort your laundry before washing?

How do they dry their laundry?

	BE		UK		DE		PL		Average	
	Private	Workwear	Private	Workwear	Private	Workwear	Private	Workwear	Private	Workwear
Hanging outside	67%	61%	72%	68%	66%	61%	72%	71%	69%	65%
Hanging inside	58%	53%	58%	58%	67%	63%	71%	70%	64%	61%
In a dryer	64%	57%	54%	47%	53%	46%	**10%**	**8%**	45%	40%
Other	1%	1%	3%	3%	1%	1%	2%	2%	2%	2%

WP14 How do you dry your laundry?

Cross: Drying laundry/habitation

		Appartment	House
Belgium	Dryer	42%	60%
	Hanging outside	42%	66%
	Hanging inside	58%	52%
UK	Dryer	37%	52%
	Hanging outside	44%	74%
	Hanging inside	67%	57%
Germany	Dryer	45%	50%
	Hanging outside	55%	67%
	Hanging inside	67%	63%
Poland	Dryer	7%	15%
	Hanging outside	67%	82%
	Hanging inside	72%	67%

Attention points when washing

Attention points when doing the laundry (Top 2 box)

	BE	UK	DE	PL	Average
The temperature	87%	76%	87%	81%	83%
The care label	64%	53%	**70%**	59%	62%
Possible contamination of workwear	33%	42%	42%	**66%**	46%
Dangerous stuff on workwear clothes	33%	36%	42%	**61%**	43%
The hardness of the water	21%	24%	**39%**	22%	27%

T0 To which of the following points do you pay attention when doing the laundry? (5-point scale)

Attention points: Hardness of water (open question)

	BE	UK	DE	PL	Average
I don't want to use more detergent	25%	24%	**46%**	26%	30%
To extend lifetime of my equipment	11%	13%	13%	17%	14%
It makes clothes harder, damages clothes	**27%**	6%	4%	4%	10%
Against the limescale	15%	6%	14%	1%	9%
Clothes are not so clean after washing	1%	4%	3%	**20%**	7%
It bleaches out the colors	1%	0%	0%	0%	0%
Other	7%	4%	0%	4%	4%
Don't know, no particular reason	9%	25%	3%	10%	12%

T2 Why do you pay attention to the hardness of the water?

Attention points: Contamination on private clothes (open question)

	BE	UK	DE	PL	Average
I try to avoid the contamination by the stains	9%	17%	9%	17%	13%
I always check my laundry before washing it	9%	21%	18%	1%	12%
I sort private wear and workwear separately	17%	6%	5%	2%	8%
I wash private wear and workwear separately	12%	18%	1%	2%	8%
I separate the wear according to the level of soil	7%	6%	5%	12%	8%
I wash my laundry 2 times, more hygienic	7%	8%	2%	8%	6%
I use extra detergent, stain remover…	0%	5%	2%	17%	6%
Other	9%	3%	3%	4%	5%
I desinfect the workwear	6%	1%	4%	0%	3%
I wash my laundry on high temperature	5%	3%	0%	5%	3%
Allergies	5%	1%	0%	1%	2%
I separate the wear when it smells bad	1%	0%	8%	0%	2%

T3 In which way do you pay attention to possible contaminations on the clothes ?

Average washing temperature of workwear

	BE	UK	DE	PL	Average
Colored workwear	44 °C	42 °C	45 °C	50 °C	45%
White workwear	57 °C	48 °C	57 °C	55 °C	54%
Other workwear	44 °C	41 °C	47 °C	50 °C	46%

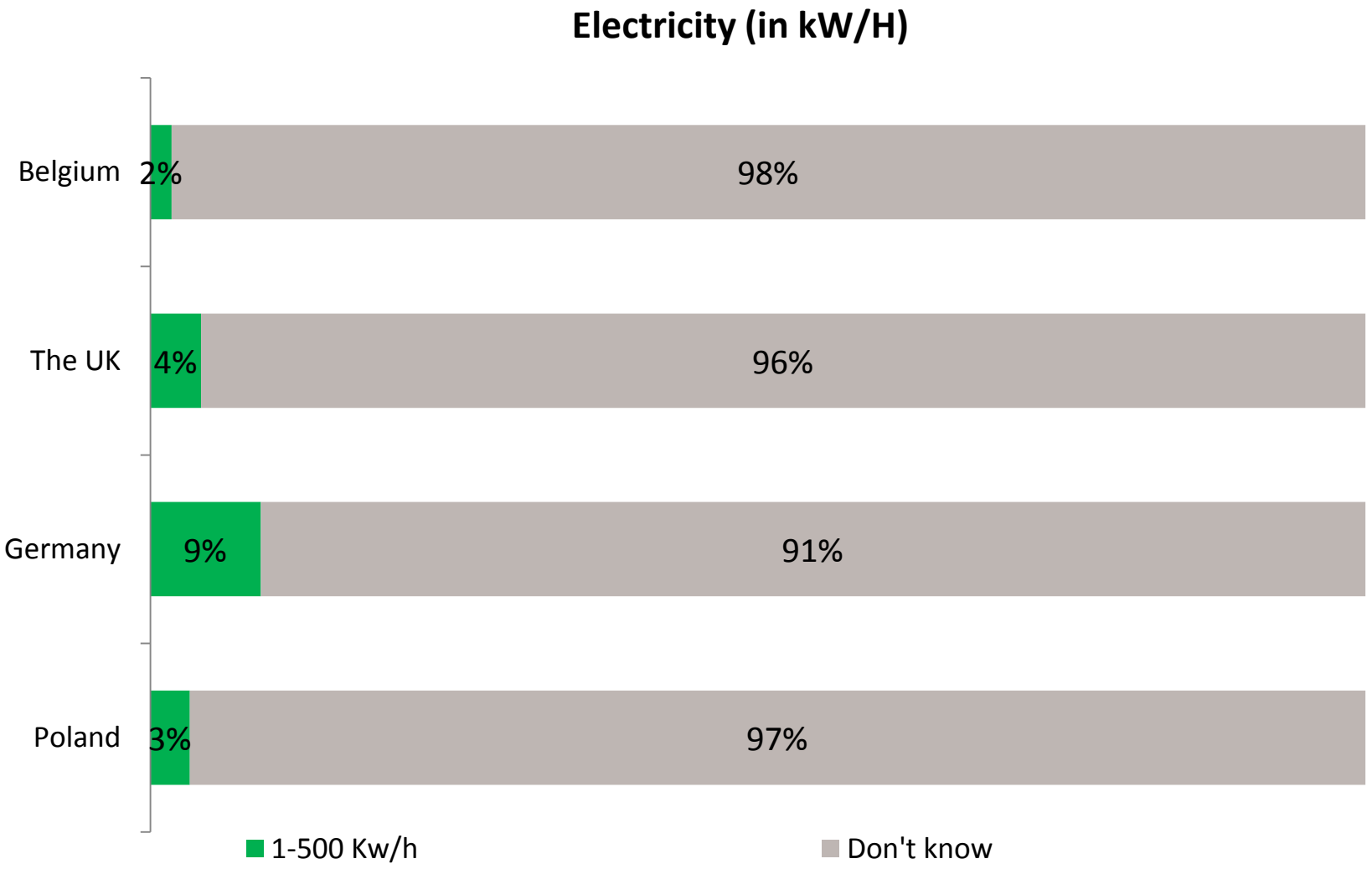
T4 At what temperature do you wash your workwear?

Usage and understanding of washing programs

Scale:	Multi	Yes/No	Yes/No	Yes/No
	BE	UK	DE	PL
I understand all the programs on my washing machine	80%	**63%**	70%	83%
I normally choose washing programs that save water	73%	**54%**	66%	68%
I sometimes start the washing machine even if it's not completely filled	44%	64%	60%	69%
I sometimes weigh the load of the wash	4%	7%	6%	13%

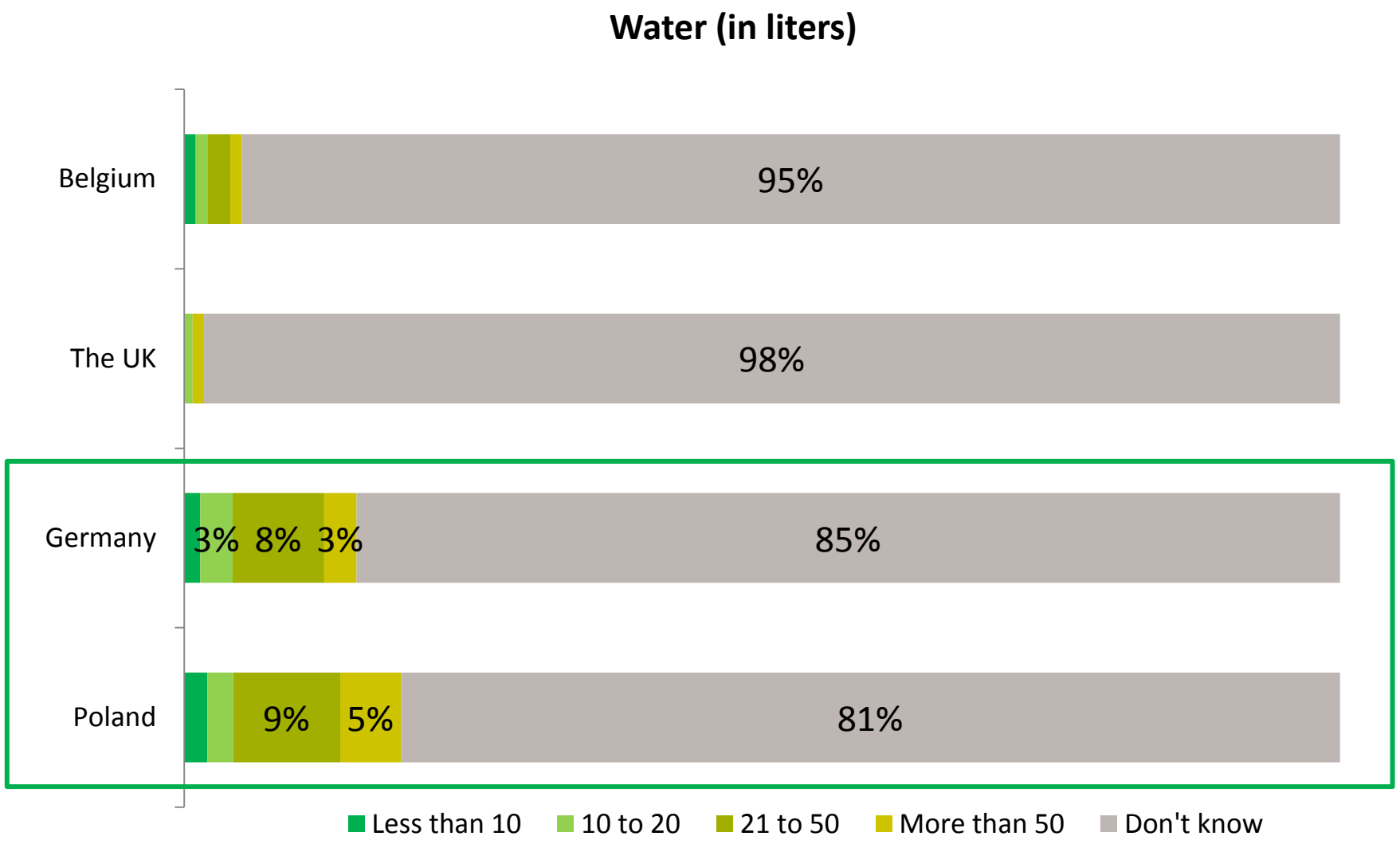
T5 Below you see some statements about washing programes.

Knowledge of electricity consumption of domestic equipment



T6 Do you know how many electricity you use per wash?

Knowledge of water consumption of domestic equipment



T7 Do you know how much water your washing machine uses per washing?

After the washing

About the storage of the workwear

	BE	UK	DE	PL	Average
In the wardrobe/shelf at home, separate from my private clothes	49%	48%	53%	57%	52%
In the wardrobe/shelf, together with the private clothes	31%	43%	32%	**18%**	31%
At work	15%	13%	**29%**	**37%**	24%
Somewhere else	6%	4%	1%	5%	4%

A1 Where do you store your workwear once it's been washed and ironed?

Statements about the washing of the textiles

	BE	UK	DE	PL	Average
I consider textiles are clean once they are washed	95%	94%	96%	86%	93%
I consider textiles are hygienic once they are washed	90%	87%	91%	88%	89%
I know that the washing recommendations are indicated on the garment's care label, and I follow them	**86%**	72%	79%	68%	76%
Bacteria are eliminated only if items are boiled or washed at 90°C	40%	36%	32%	**45%**	38%
Sometimes I doubt if I am washing my clothes in the right way	35%	32%	27%	43%	34%
I think it's useful to disinfect my hands when handling clean workwear	23%	26%	16%	**36%**	25%
There is a risk of contamination when using my iron board for clean workwear	12%	17%	10%	**27%**	17%

A2 Below you'll find some statements about the washing of the textiles. Do you agree with the following sentences?

Textile

Do you repair your workwear?

	BE	UK	DE	PL	Average
Yes	36%	35%	43%	41%	39%
No, the employer repairs it	14%	7%	14%	8%	11%
No, it is replaced when damaged	50%	59%	43%	51%	51%

TX1 Do you ever have to repair your workwear/ workwear of your partner?

Who repairs your workwear?

	BE	UK	DE	PL	Average
I repair it/ my partner repairs it	75%	85%	83%	77%	80%
Someone I know/someone in the family	24%	15%	17%	15%	18%
I give it to a tailor	5%	5%	**16%**	6%	8%
I give it to a specialised company to repair it	2%	2%	2%	0%	2%
Other, specify	2%	1%	2%	1%	2%

TX2 Who repairs the workwear ?

Employer

About the relationship with the employer

	BE	UK	DE	PL	Average
Satisfaction arrangement with the employer top 2 box : % (very) satisfied	67%	69%	**75%**	**60%**	68%
Workwear provided by the employer	78%	82%	71%	75%	77%
Financial compensation (monthly/yearly)	18%	18%	19%	**37%**	23%

E1 Are you satisfied with the current arrangement between you and your employer concerning your workwear?
E2 Is your workwear provided by your employer?
E4 Do you receive a financial compensation for washing workwear at home?

Cross: sector/satisfaction with the employer (top 2 box)

	BE	UK	DE	PL	Average
Construction	55%	67%	67%	53%	**61%**
Public services	73%	73%	**90%**	**72%**	**77%**
Healthcare/medical sector	60%	67%	67%	**78%**	68%
Engineering	67%	74%	71%	59%	68%
Food and beverage sector	**82%**	66%	79%	58%	71%
Retail/supermarket/store...	**82%**	70%	79%	50%	70%
Agriculture/horticulture	53%	72%	78%	50%	63%
Chemical/petrochemical sector	75%	71%	100%	**76%**	81%
Road works	75%	77%	100%	48%	75%
Fishery	100%	71%	33%	50%	64%
Other : specify	62%	68%	80%	60%	68%
Total	67%	69%	75%	60%	68%

Involvement of the employer concerning the laundry

Scale:	Multi	Yes/No	Yes/No	Yes/No
	BE	UK	DE	PL
The employer allows me to wear my workwear at home or while travelling to and from work	19%	**70%**	56%	38%
The employer gave instructions how to wash and what I have to pay attention to when washing the workwear	8%	19%	**71%**	28%
The employer checks the state of the PPE from time to time	10%	31%	32%	**47%**
The employer gave me instructions about the cleanliness/ state of my privately washed workwear	21%	22%	22%	**35%**
The employer made recommendations on how often to change the workwear	7%	23%	22%	**31%**
The employer made recommendations regarding washing programme and washing temperature for my workwear	6%	19%	18%	20%
Non involvement	58%	**51%**	**10%**	34%

E3 Some statements about the employer. The employer...

Attitude towards the idea of industrial laundering

Interest in industrial laundering solution

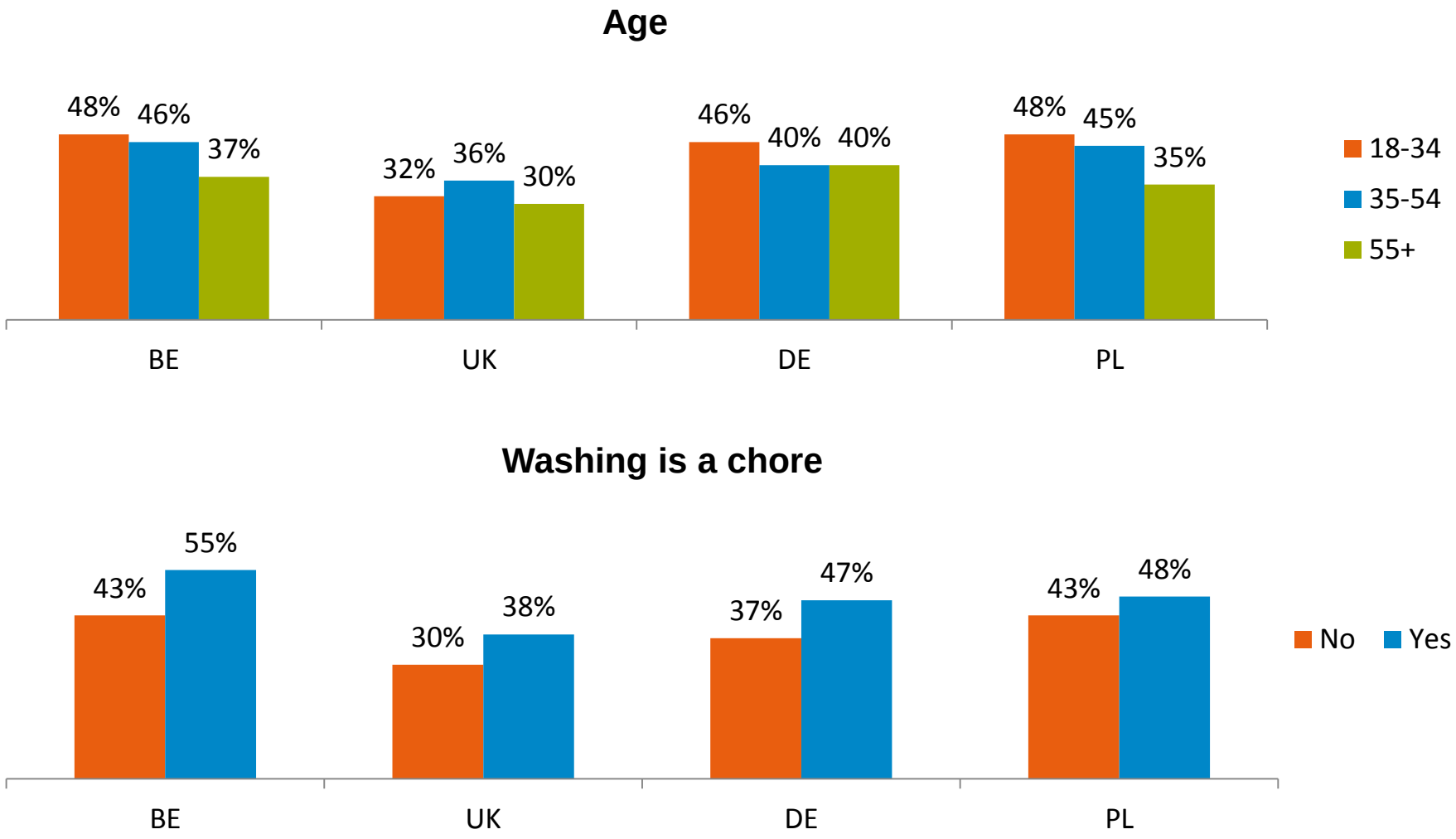
	BE	UK	DE	PL	Average
Certainly interested	20%	18%	21%	13%	18%
Probably interested	25%	16%	21%	31%	23%
TOP 2 BOX	**45%**	**34%**	**42%**	**44%**	**41%**
Maybe yes, maybe not	26%	34%	33%	17%	28%
Probably not interested	14%	19%	14%	24%	18%
Certainly not interested	15%	13%	11%	15%	14%
BOTTOM 2 BOX	**29%**	**32%**	**25%**	**39%**	**32%**

I1 If your employer would offer the possibility to outsource the handling and the laundry of your workwear to a professional textile service company, this means they provide you with a set of customized workwear (your "own" workwear) and they take care of the cleaning , maintenance , exchange when worn out... Would you be interested in this full service?

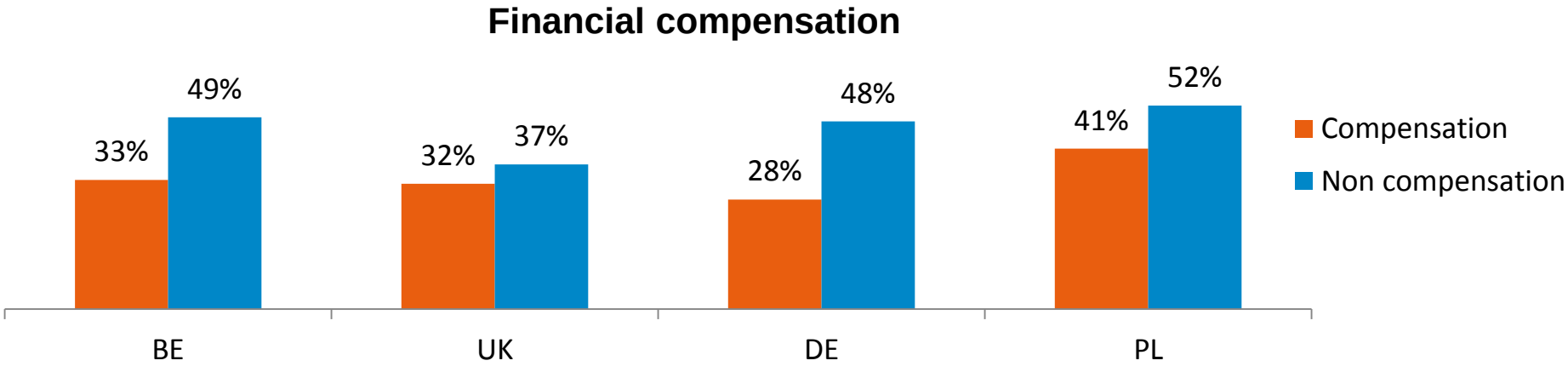
Cross: sector/interest industrial laundry solution (top 2 box)

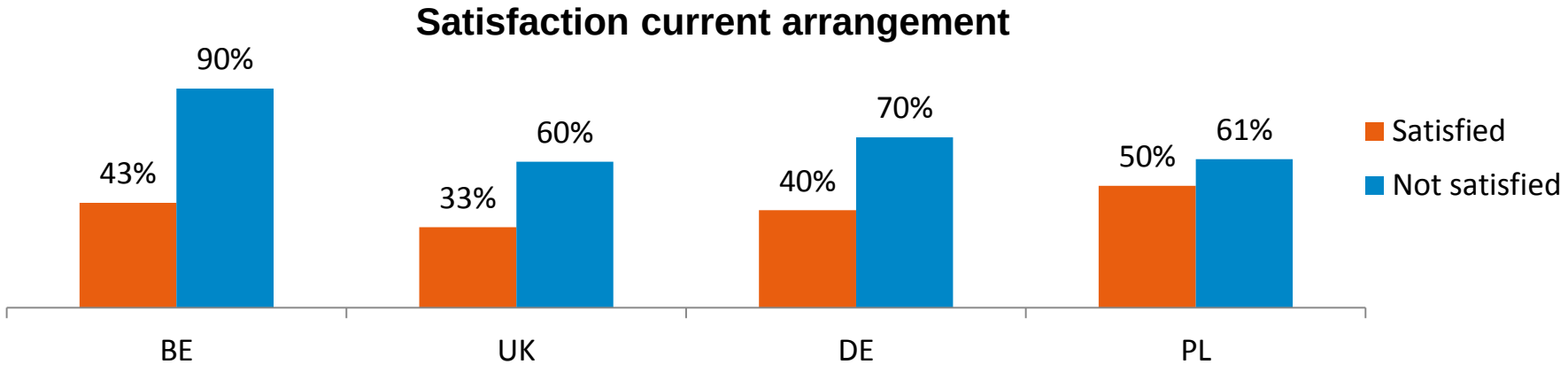
	BE	UK	DE	PL	Average
Construction	45%	**24%**	45%	46%	40%
Public services	**38%**	36%	40%	**56%**	43%
Healthcare/medical sector	**56%**	**45%**	45%	47%	**48%**
Engineering	**55%**	41%	45%	41%	46%
Food and beverage sector	39%	36%	50%	42%	42%
Retail/supermarket/store...	50%	**48%**	39%	36%	43%
Agriculture/horticulture	40%	13%	50%	50%	38%
Chemical/petrochemical sector	57%	33%	60%	**68%**	55%
Road works	43%	52%	40%	28%	41%
Fishery	0%	0%	0%	50%	13%
Other : specify	44%	25%	39%	33%	35%
Total country	45%	34%	42%	45%	42%

Cross: interest in industrial laundering (top 2 box)



Cross: interest in industrial laundering (top 2 box)

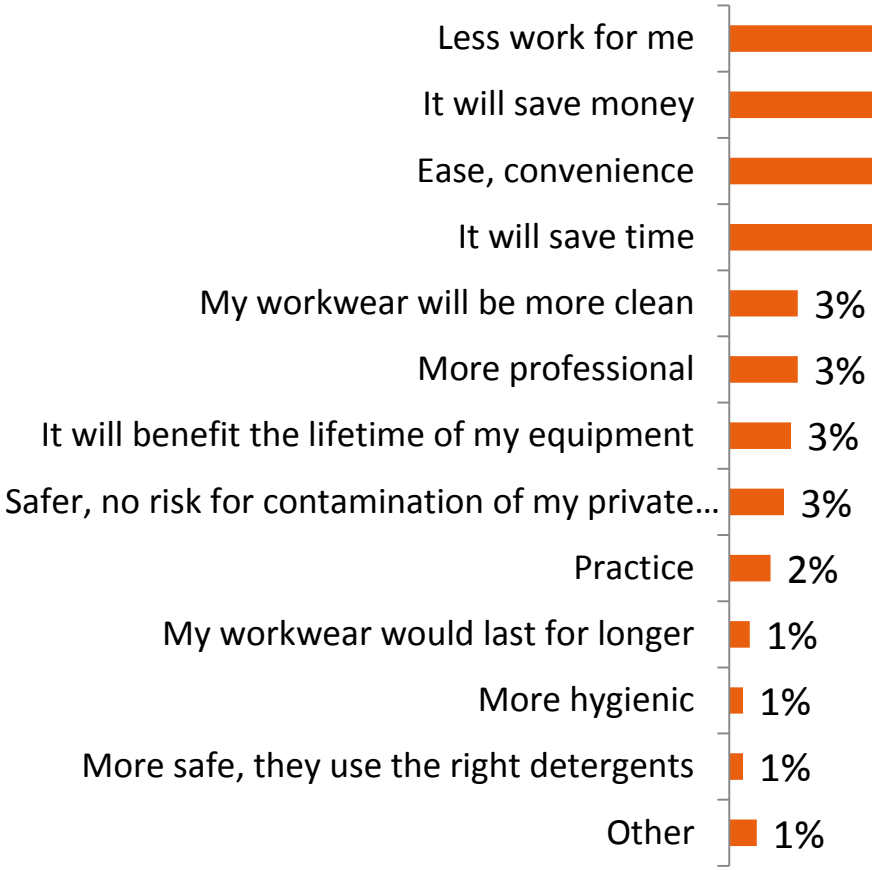




WP10 Some statements about washing. When washing...

Reason for interest in industrial laundering (open question)

BE



"Better for the private clothes and for the washing machine and dryer!"

"My son works in a printing industry and his clothes are very dirty with paint. It is so difficult for me to get it very clean"

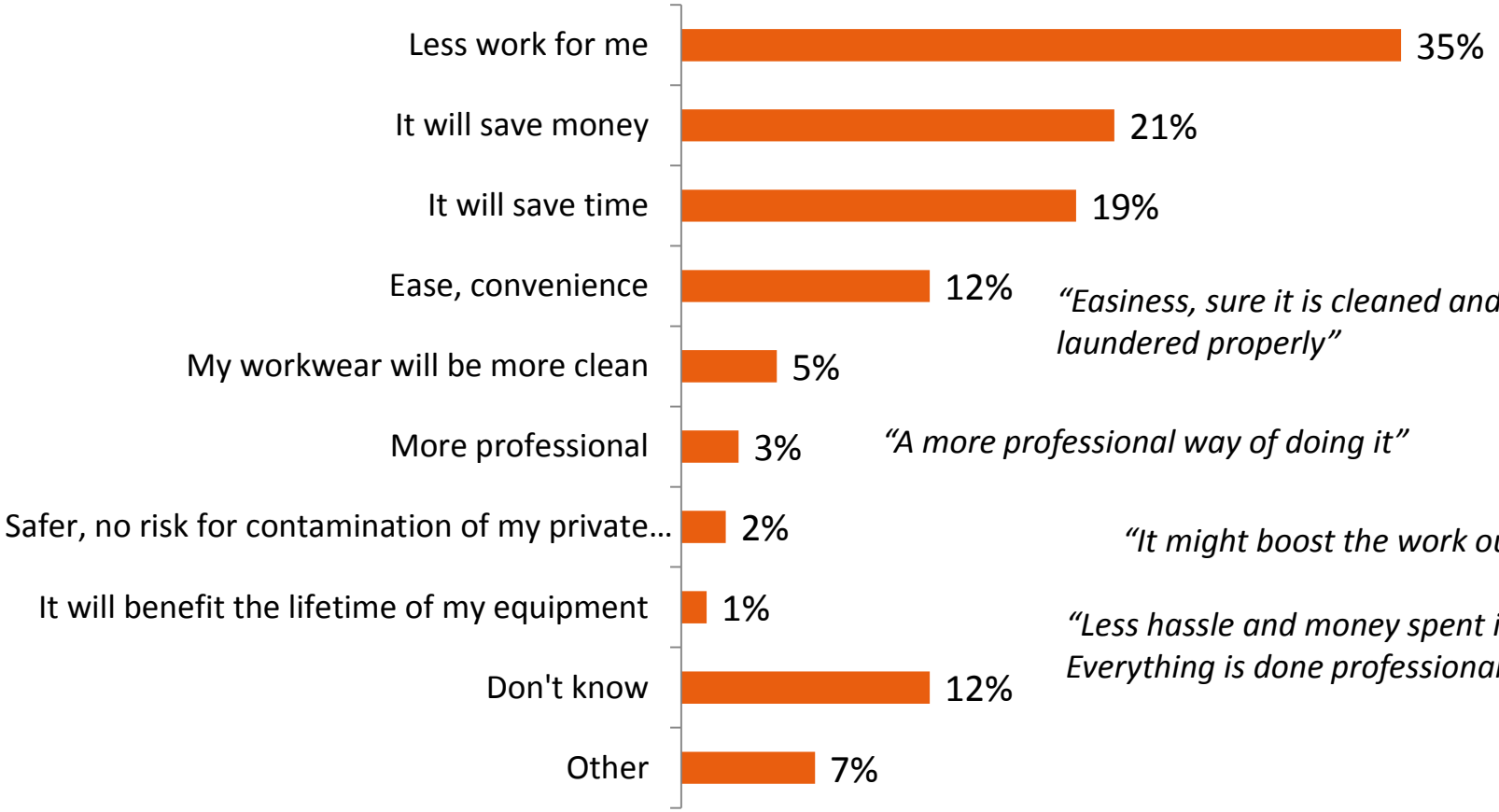
"It is really a chore to wash workwear, and I don't have detergent which is enough powerful to get it completely clean"

"Save my time and money because I won't have to use my equipment anymore (washing machine and dyer) in order to clean my workwear"

I2a For which reasons would you be interested in?
Base n= 326

Reason for interest in industrial laundering (open question)

UK



"Easiness, sure it is cleaned and laundered properly"

"A more professional way of doing it"

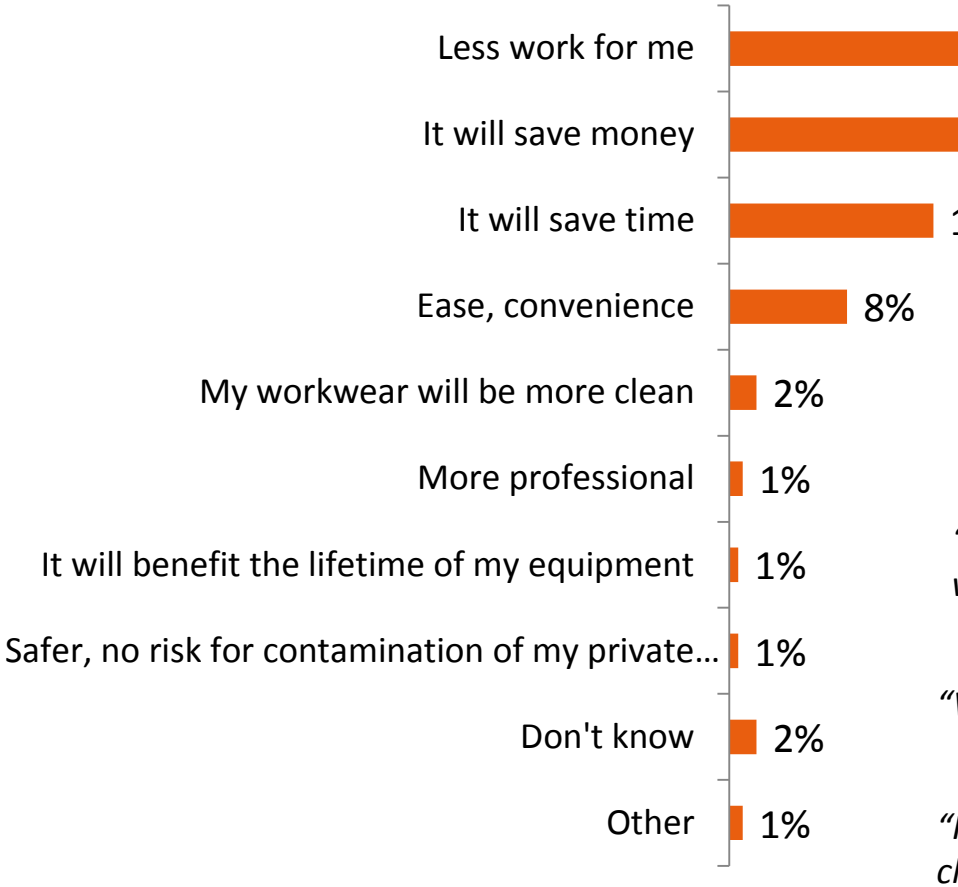
"It might boost the work output"

"Less hassle and money spent in my case. Everything is done professionally."

I2a For which reasons would you be interested in?
Base n= 277

Reason for interest in industrial laundering (open question)

DE



"For me this means less work"

"If it does not cost anything and if it is reliable, it means less work and expenses for me

"Because it is annoying to wash private and work clothes together because of the oil stains"

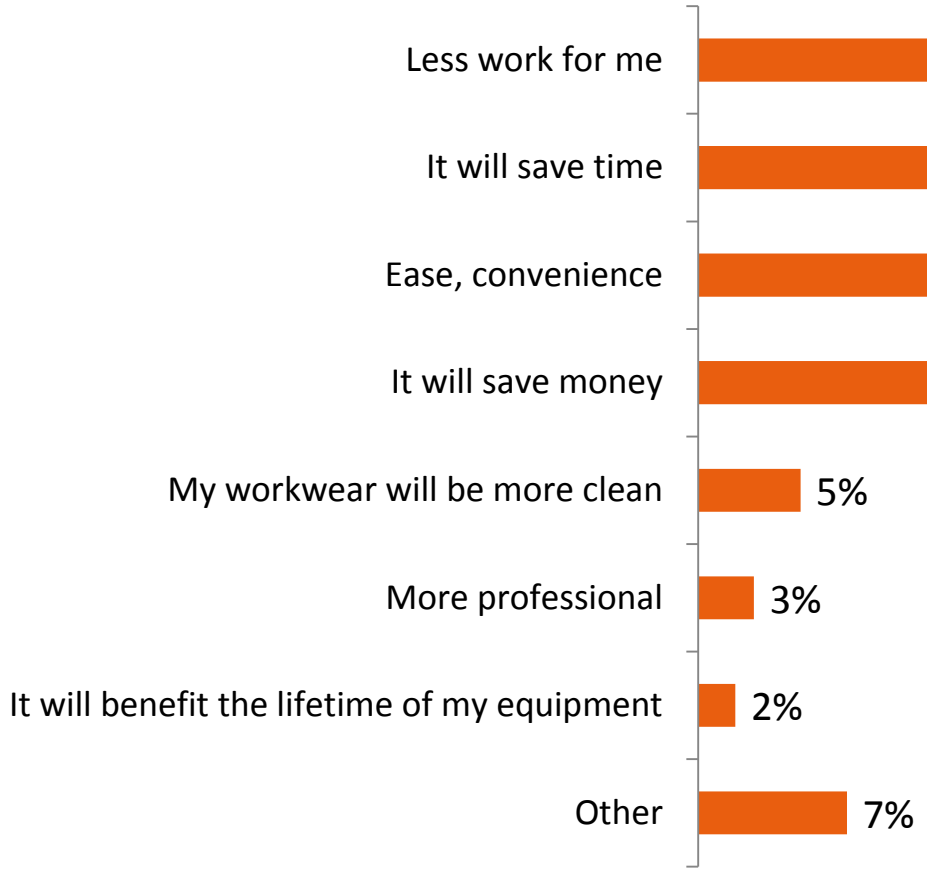
"Working clothes will be cleaner"

"I don't have to look after the separation of the clothes all the time"

I2a For which reasons would you be interested in?
Base n= 320

Reason for interest in industrial laundering (open question)

PL



" More free time "

"mniej kłopotu" (Less worries) !"

'So I am sure, they are well cleaned and repaired"

"I prefer someone else to do the laundry and when I come to work the clothes are ready"

"I don't have to wash it at home, I don't use my detergent and electricity"

I2a For which reasons would you be interested in?
Base n= 234

Reason for interest in industrial laundering (open question)

	BE	UK	DE	PL	Average
Less work for me	34%	35%	**54%**	32%	39%
It will save money	25%	21%	20%	15%	20%
It will save time	9%	19%	14%	24%	17%
Ease, convenience	16%	12%	8%	16%	13%
My workwear will be more clean	3%	5%	2%	5%	4%
More professional	3%	3%	1%	3%	3%
It will benefit the lifetime of my equipment	3%	1%	1%	2%	2%
Safer, no risk for contamination of my private clothes	3%	2%	1%	0%	2%
Other	1%	7%	1%	7%	4%

I2a For which reasons would you be interested in?

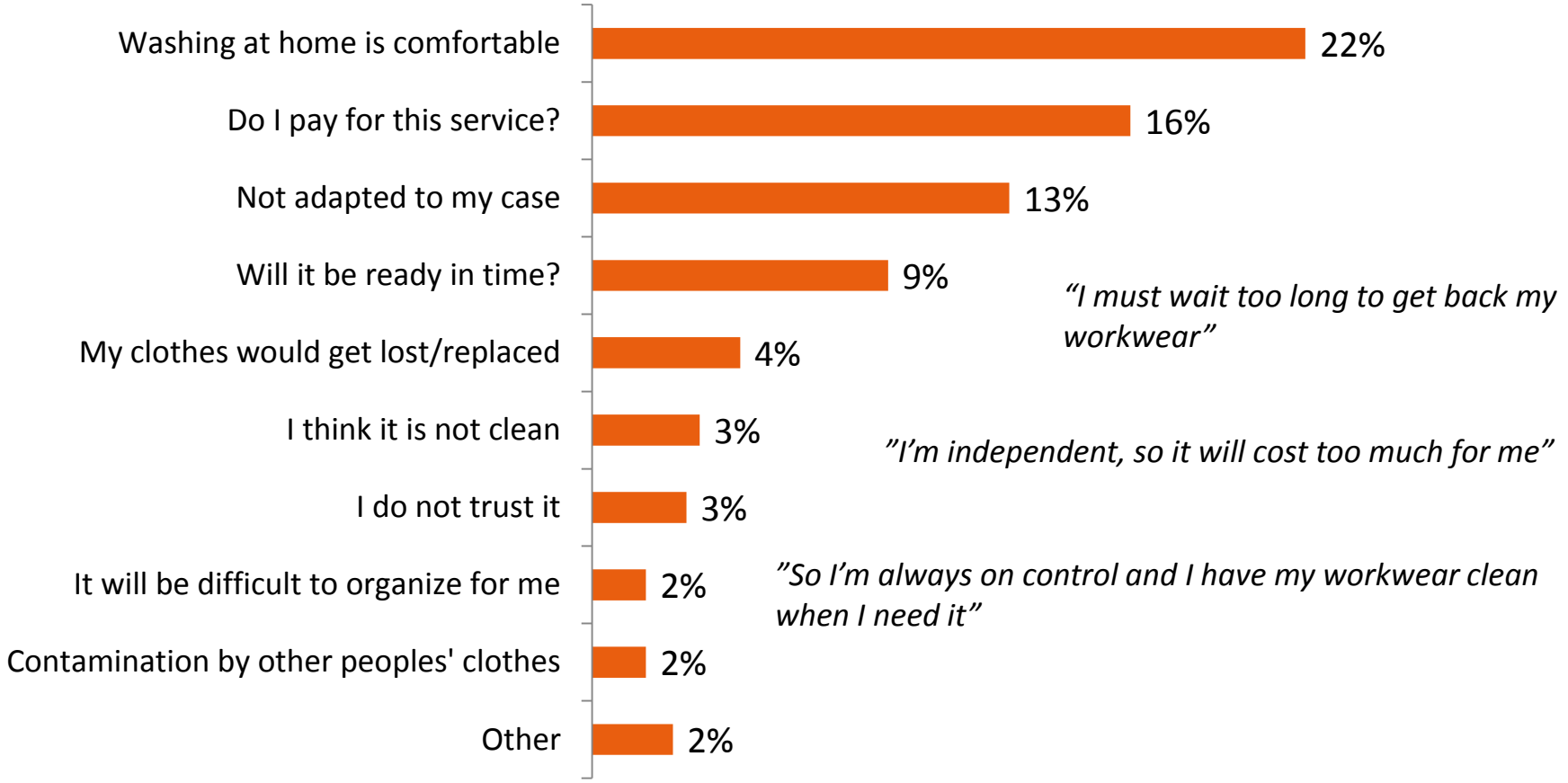
Advantages of industrial laundering : aided

	BE	UK	DE	PL	Average
It will save me time	74%	67%	77%	63%	70%
It will save me money/reduce my costs	68%	64%	66%	60%	65%
It will be beneficial for the lifetime of my equipment	68%	58%	67%	57%	63%
Less work for me/my partner	74%	**43%**	62%	53%	58%
My workwear will be more clean	53%	51%	54%	51%	52%
More hygienic	48%	48%	47%	52%	49%
More environmental friendly	44%	44%	50%	48%	47%
Safer, no risk for contamination of my private clothes	40%	46%	44%	54%	46%
More safe; they use the right detergents	44%	43%	48%	48%	46%
My workwear would last longer	35%	39%	46%	45%	41%

I3 Outsourcing the laundry of your workwear to a professional textile service company can offer you some advantages , please tell us how important each of the following benefits are to you .

Reason for being not interested (open question)

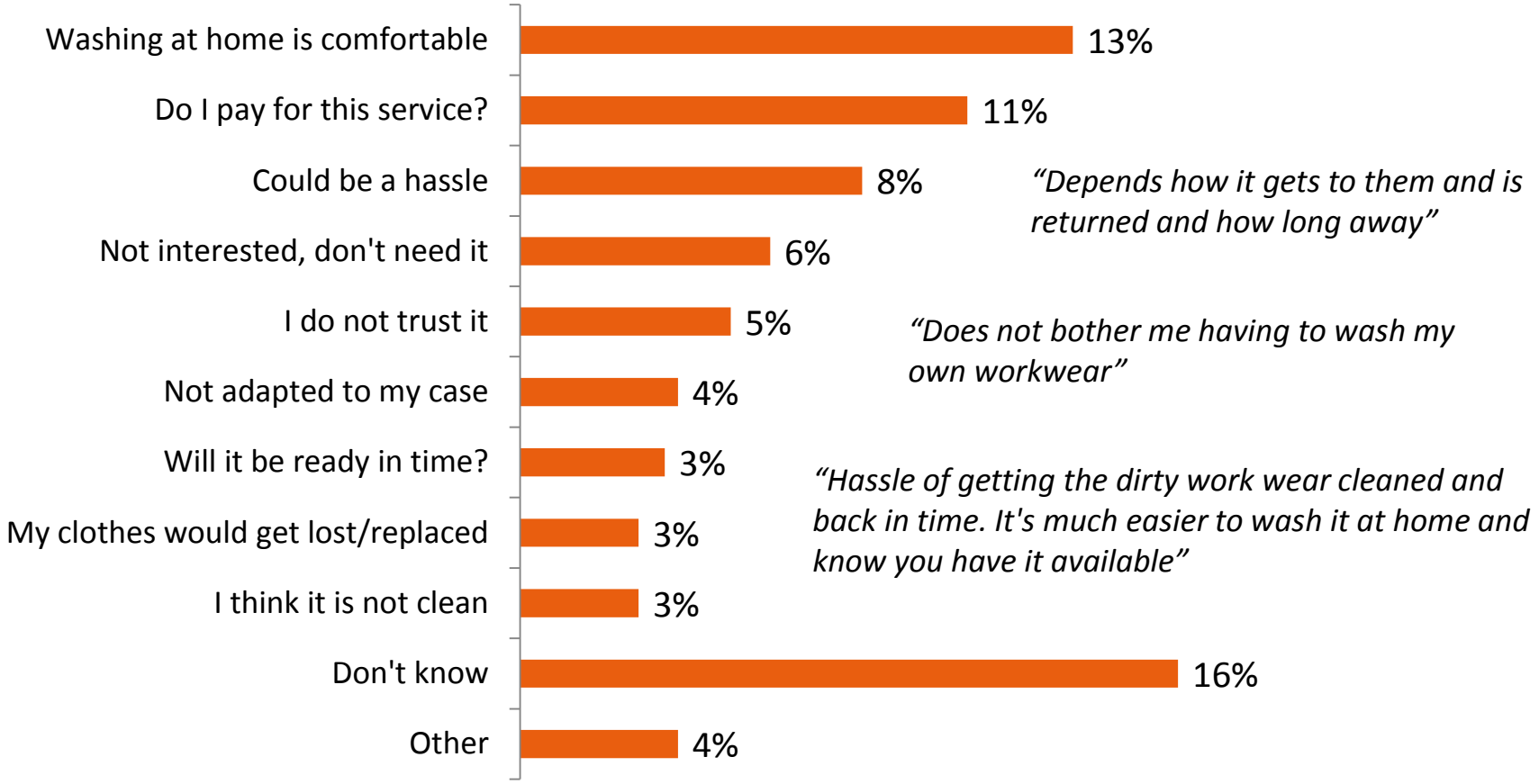
BE



I2b For which reasons wouldn't you be interested in?
Base n= 252

Reason for being not interested (open question)

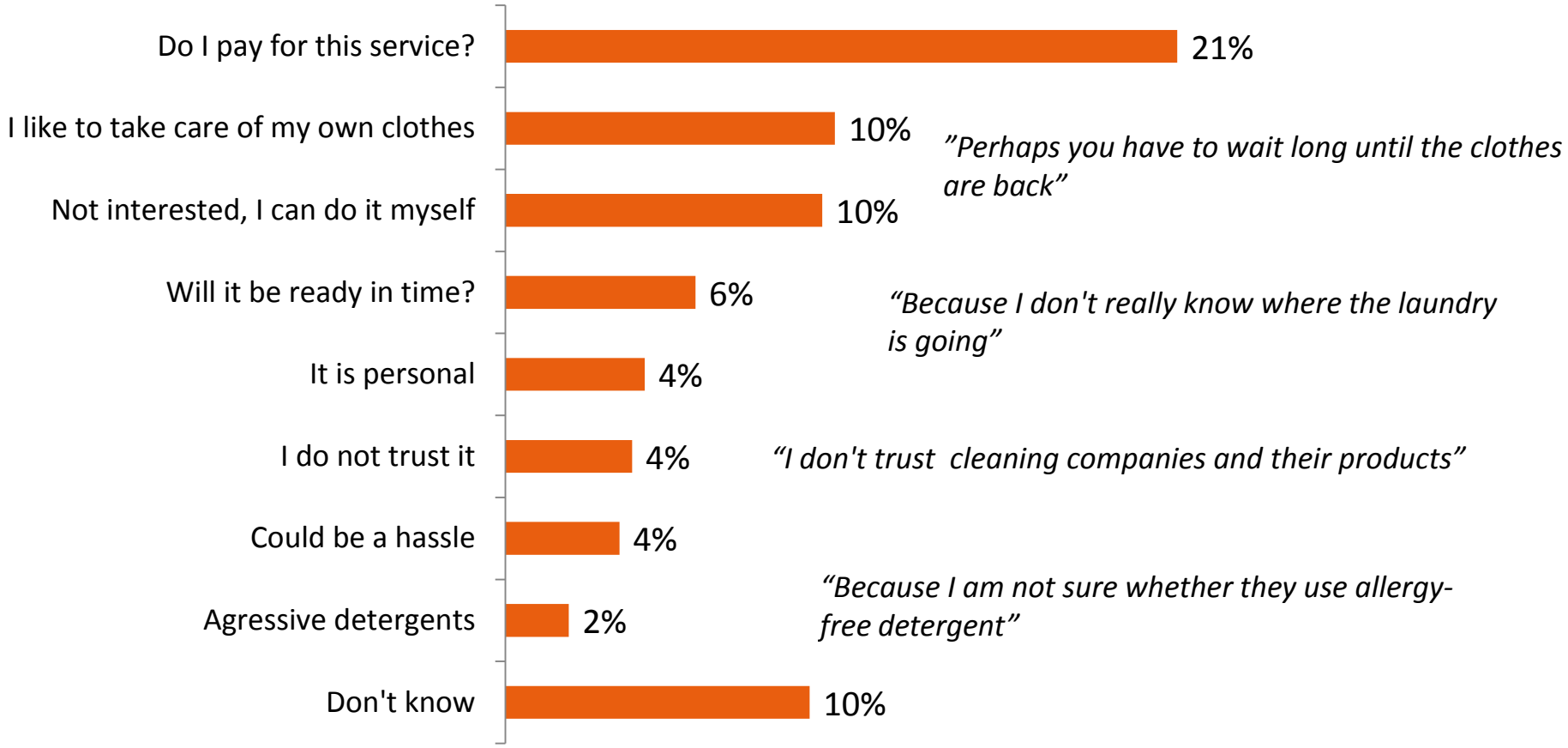
UK



I2b For which reasons wouldn't you be interested in?
Base n= 269

Reason for being not interested (open question)

DE



I2b For which reasons wouldn’t you be interested in?
Base n= 249

Reason for being not interested (open question)

PL

I2b For which reasons wouldn't you be interested in?
Base n= 210

Reason for being not interested (open question)

	BE	UK	DE	PL	Average
Washing at home is comfortable/ like to take care of my own clothes	22%	13%	10%	**34%**	20%
Do I pay for this service?	16%	11%	21%	17%	16%
Not adapted to my case	13%	4%	1%	4%	6%
Not interested, I can do it myself	0%	6%	10%	9%	6%
Will it be ready in time?	**9%**	3%	6%	1%	5%
I do not trust it	3%	5%	4%	5%	4%
Could be a hassle	0%	**8%**	4%	3%	4%
My clothes would get lost/replaced	4%	3%	1%	5%	3%
I think it is not clean	3%	3%	1%	1%	2%
It will be difficult to organize for me	2%	0%	0%	0%	1%
Contamination by other peoples' clothes	2%	1%	1%	0%	1%
Other	2%	4%	1%	3%	3%

I2b For which reasons wouldn't you be interested in?

Concerns and issues about industrial laundering: aided

	BE	UK	DE	PL	Average
My clothes could get lost/ replaced	52%	59%	55%	45%	53%
Doing the washing at home is just comfortable	43%	48%	39%	41%	43%
My clothes will smell less good	37%	40%	44%	44%	41%
My clothes will feel less soft	37%	38%	43%	40%	40%
I think they use detergents that are too aggressive	35%	38%	41%	37%	38%
More risk for allergic reactions	27%	36%	40%	34%	34%
I am concerned about contamination by other peoples' clothes	21%	35%	26%	34%	29%
It will be difficult to organize in my case	27%	33%	28%	30%	27%
I expect the workwear to have a shorter lifetime	27%	27%	24%	31%	27%
I think it is not as clean	14%	21%	17%	26%	20%

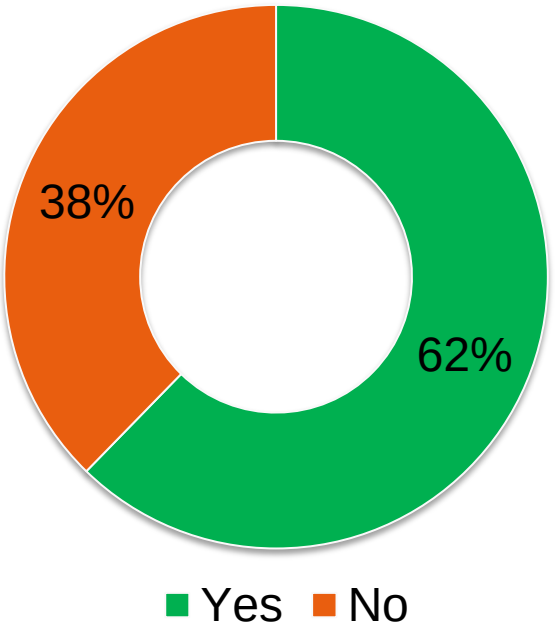
I4 Below we listed some concerns and issues other people raised regarding outsourcing the laundry of your workwear to a professional textile service company . Using this 5-point scale, please indicate to which extent you agree with each of the following statements.

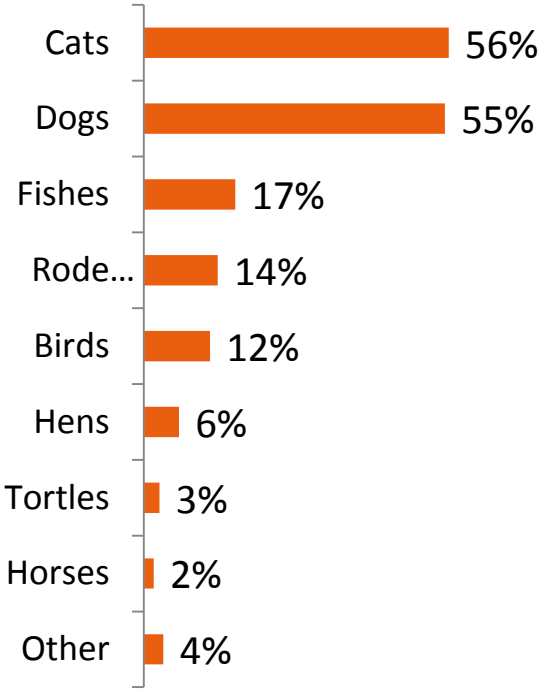
General questions

General questions: do they have pets?

BE

Pets at home



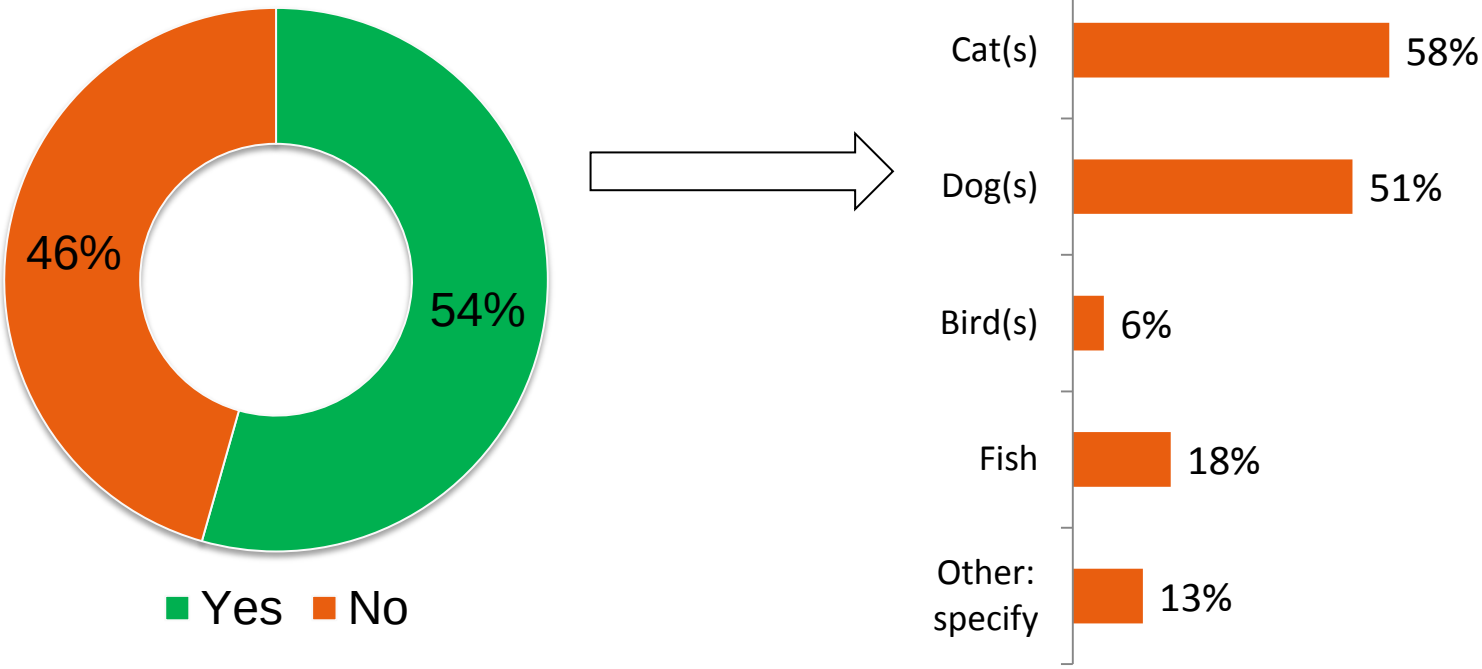


Base n= 459

General questions: do they have pets?

UK

Pets at home

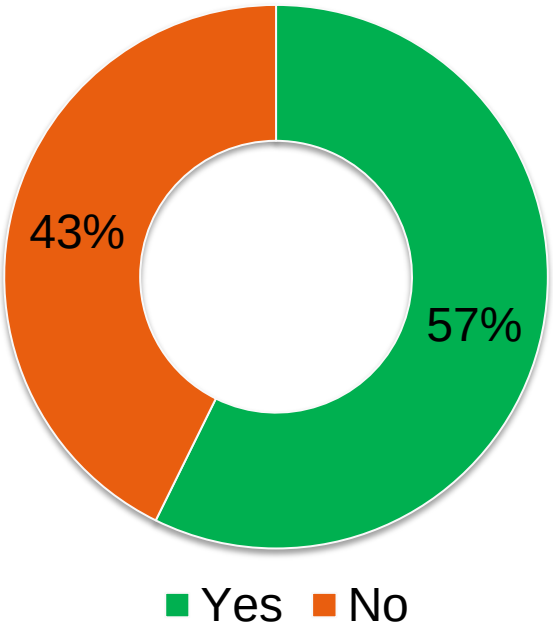


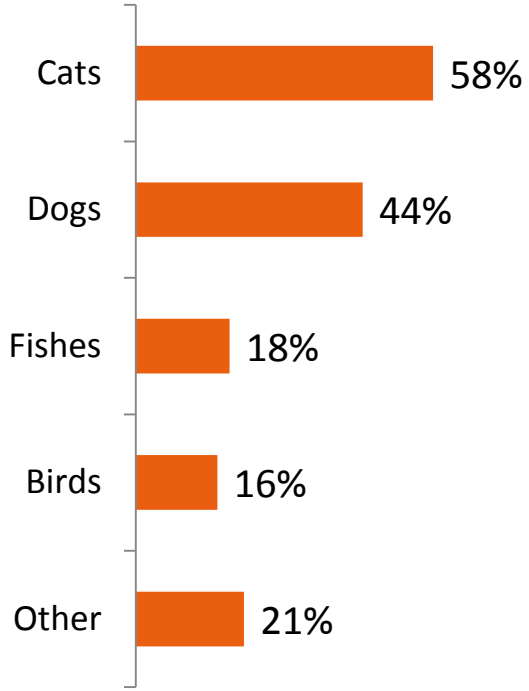
Base n= 407

General questions: do they have pets?

DE

Pets at home



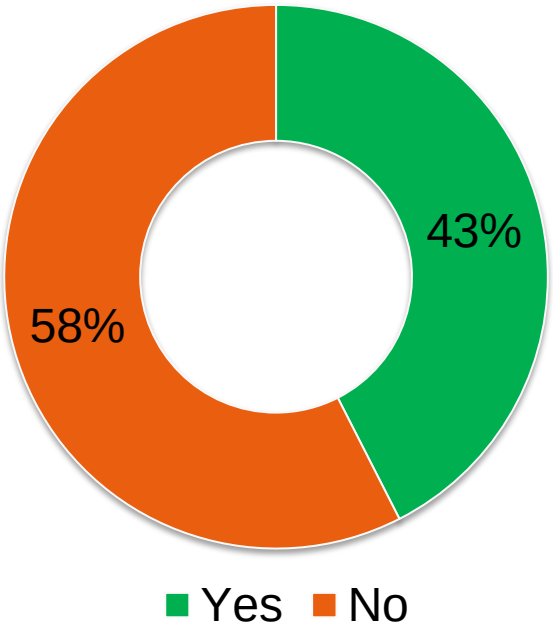


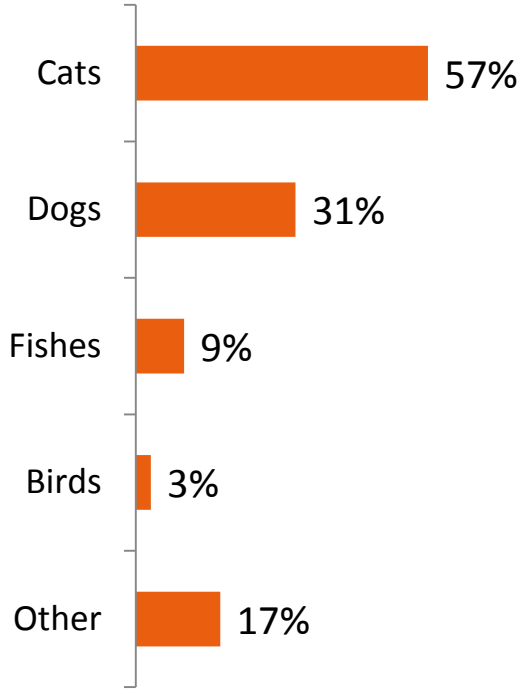
Base n= 429

General questions: do they have pets?

PL

Pets at home

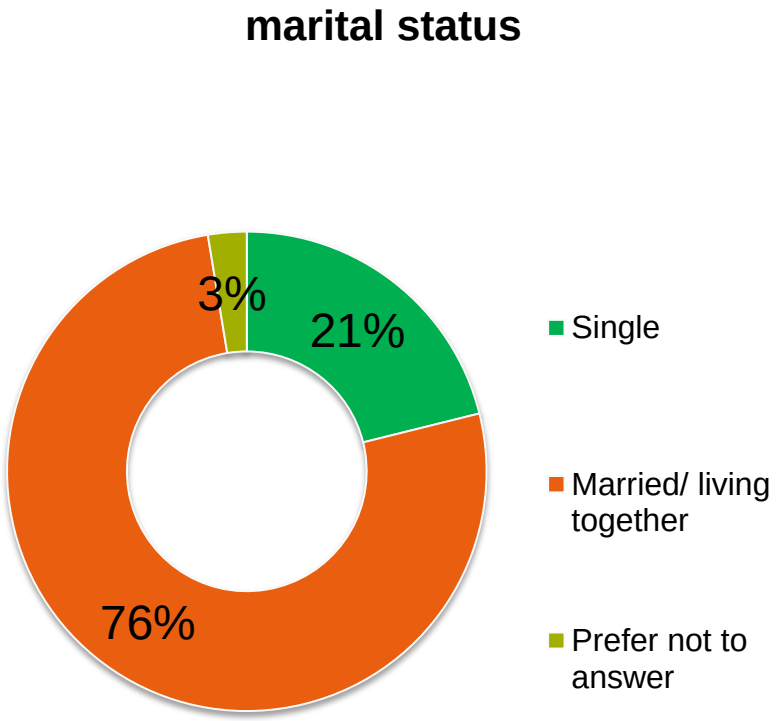


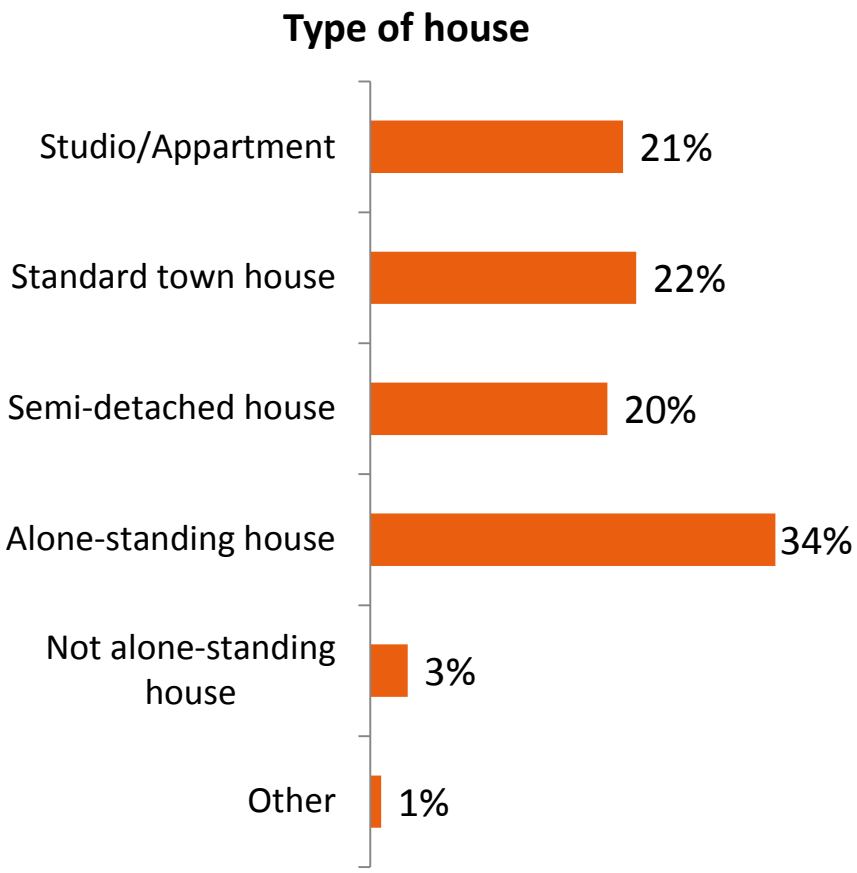


Base n= 400

General questions: marital status/ type of house

BE

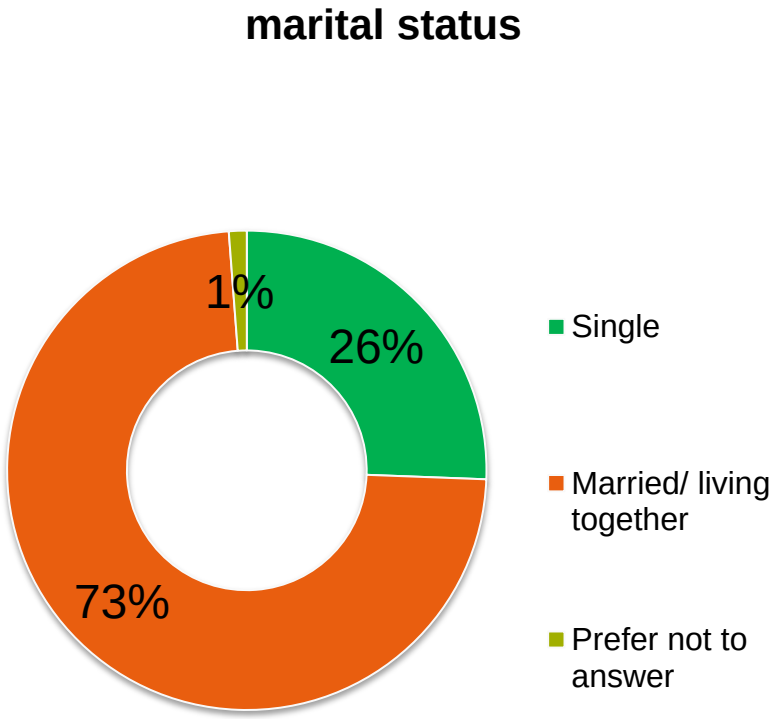


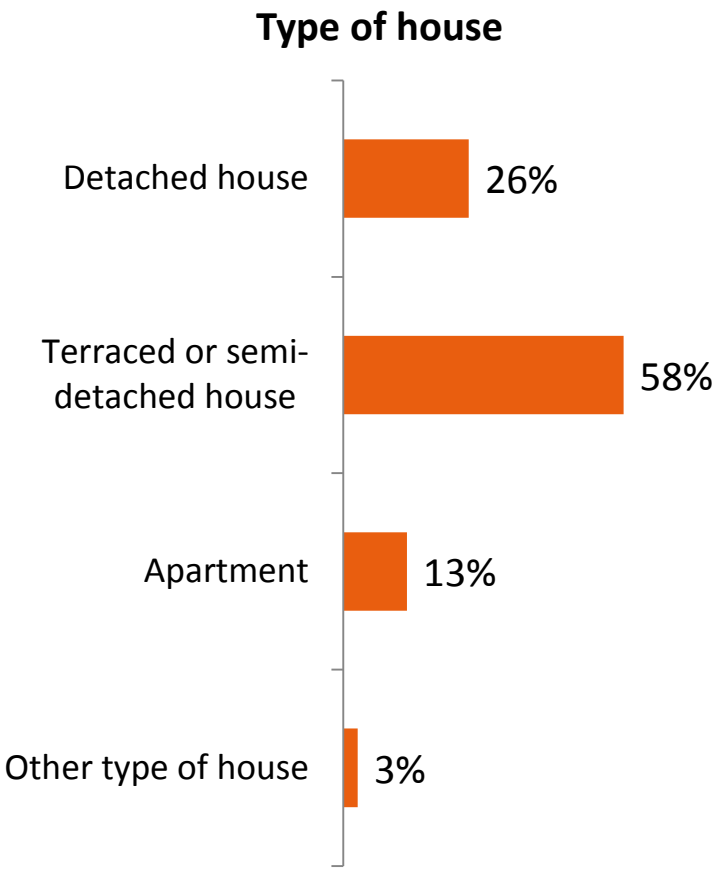


Base n= 459

General questions: marital status/ type of house

UK





Base n= 407

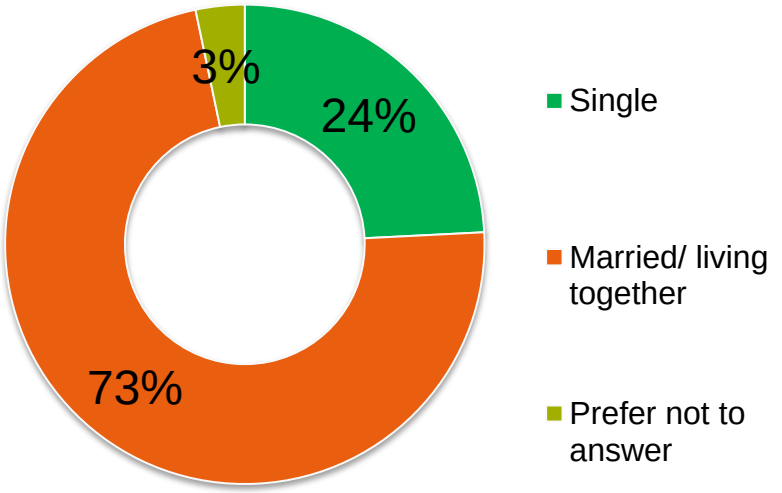
General questions: marital status/ type of house

DE

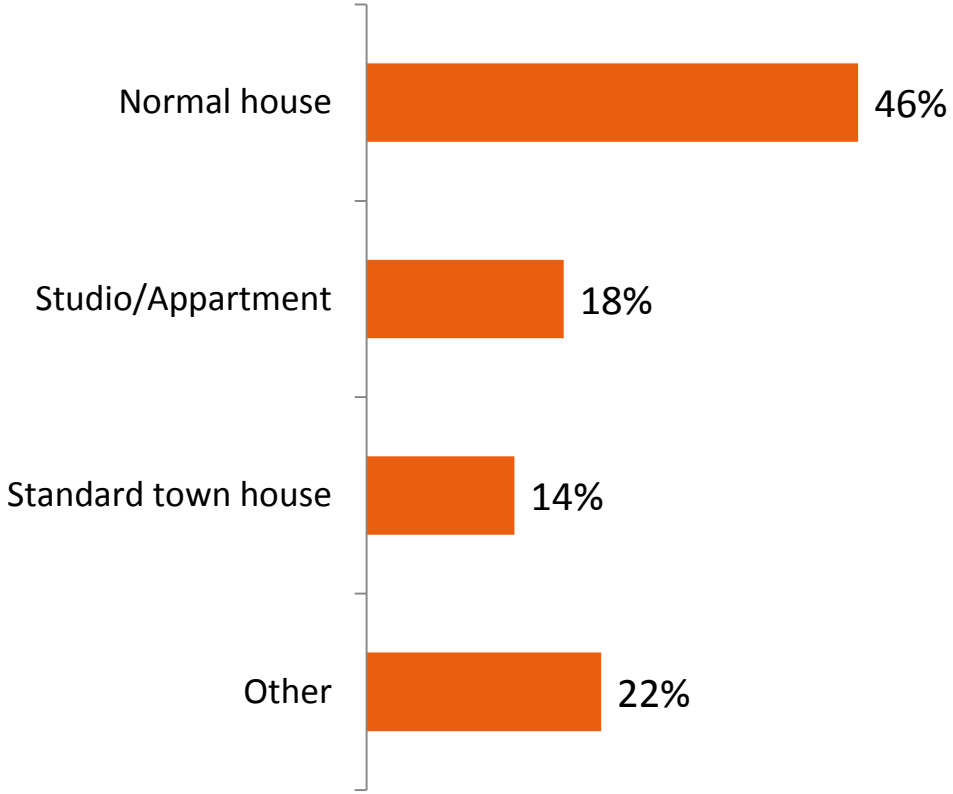
ETSA

GfK

marital status



Type of house



Base n= 429

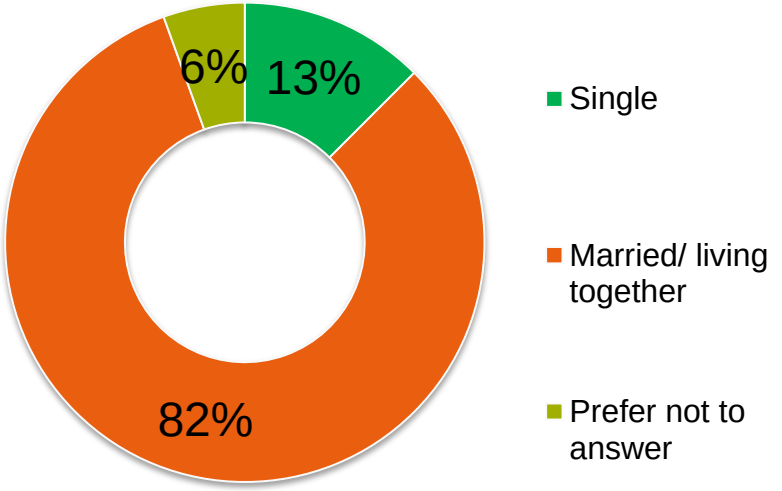
General questions: marital status/ type of house

PL

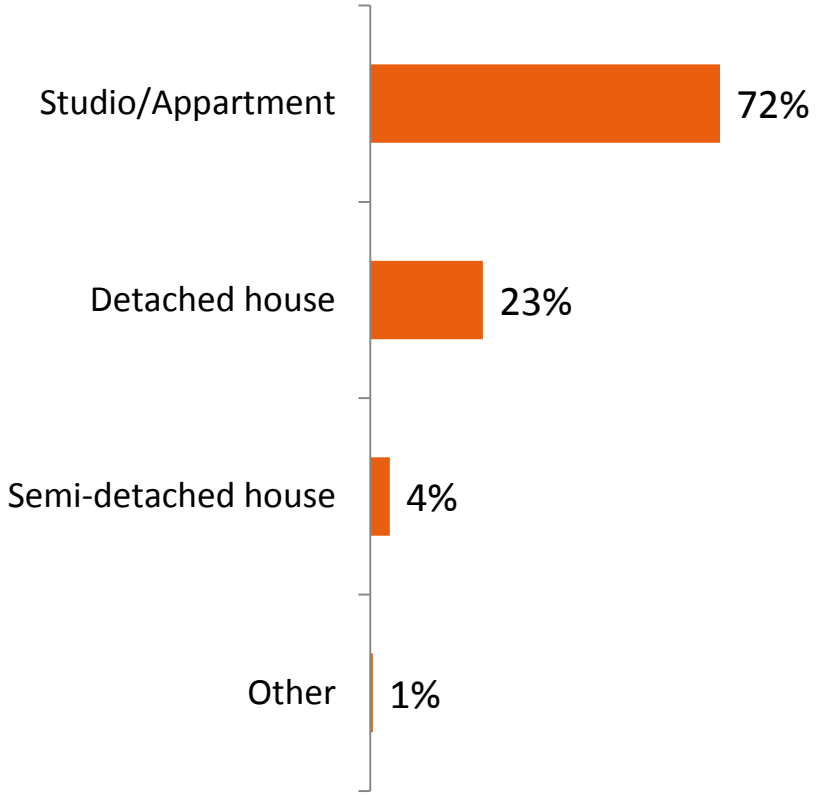
ETSA

GfK

marital status



Type of house



Base n= 400

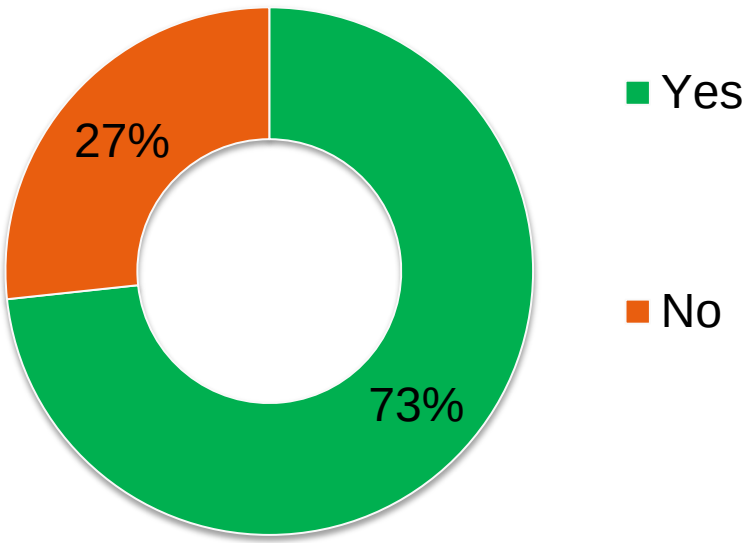
General questions: garden and terrace

BE

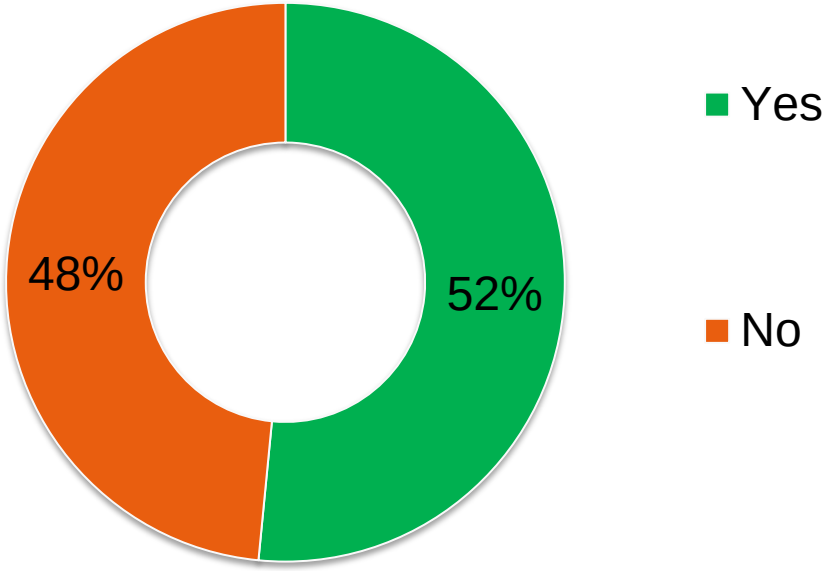
ETSA

GfK

Garden



Open air terrace



Base n= 459

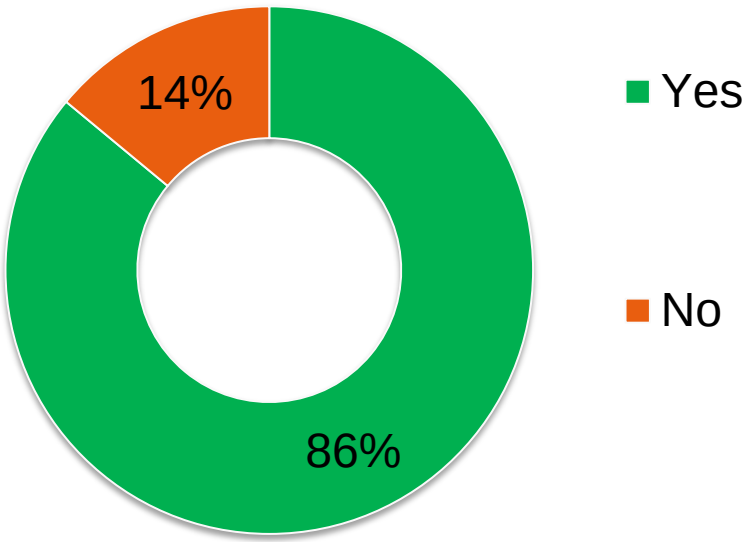
Relative high % of gardens/ less open air terrace

UK

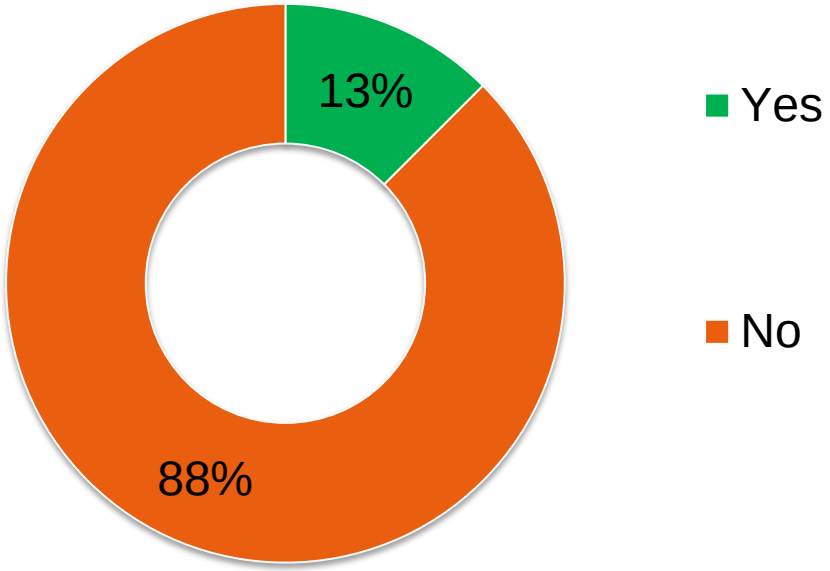
ETSA

GfK

Garden



Open air terrace

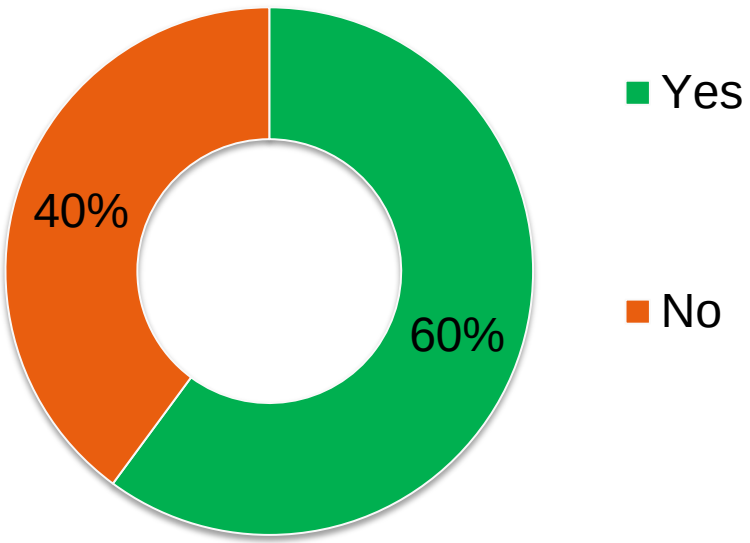


Base n= 407

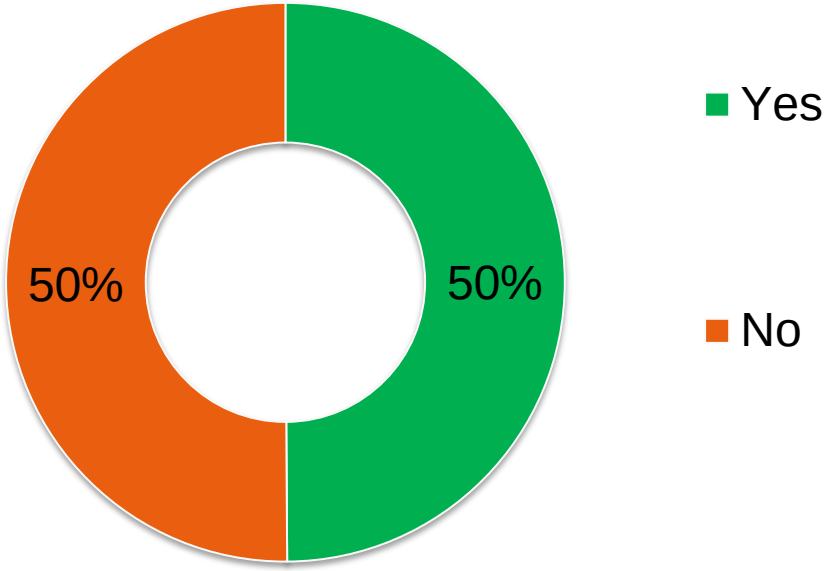
General questions: garden and terrace

DE

Garden



Open air terrace

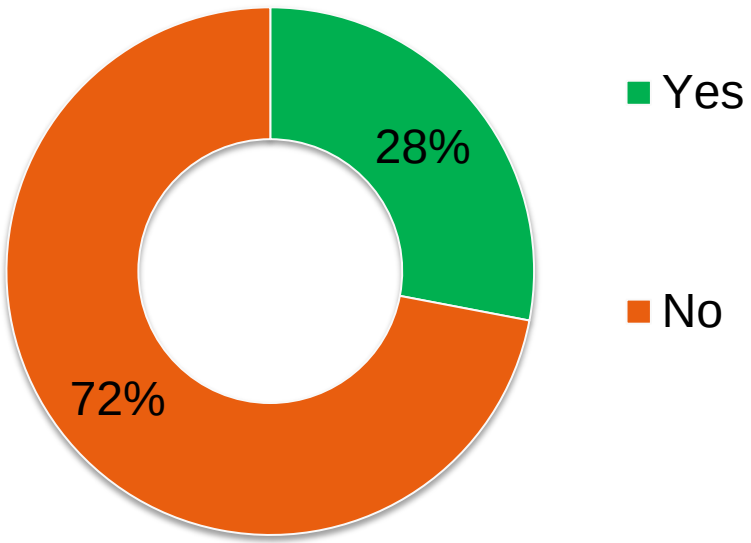


Base n= 429

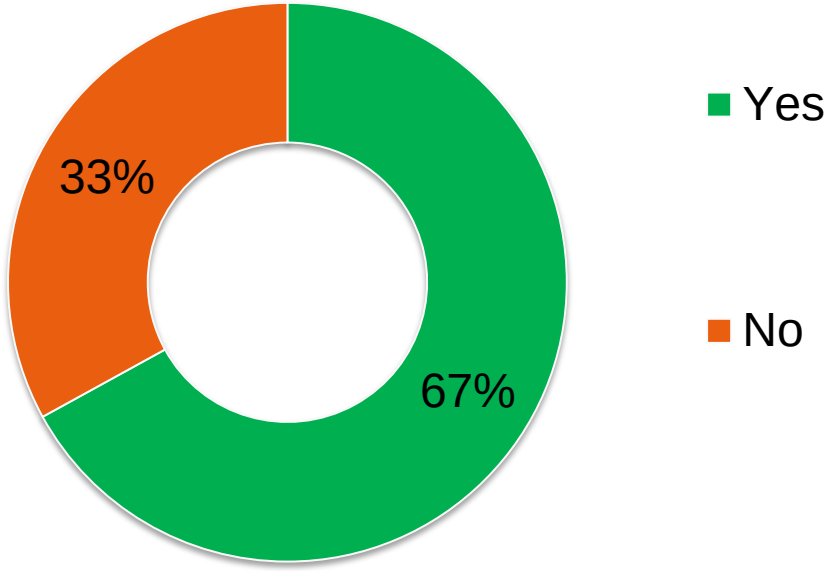
General questions: garden and terrace

PL

Garden



Open air terrace



Base n= 400

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