

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

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Abstract – Focus on hygiene

Perceptions of the cleaning and hygiene industry by European citizens, Targeted Hygiene and behaviours – April 2021

Introduction

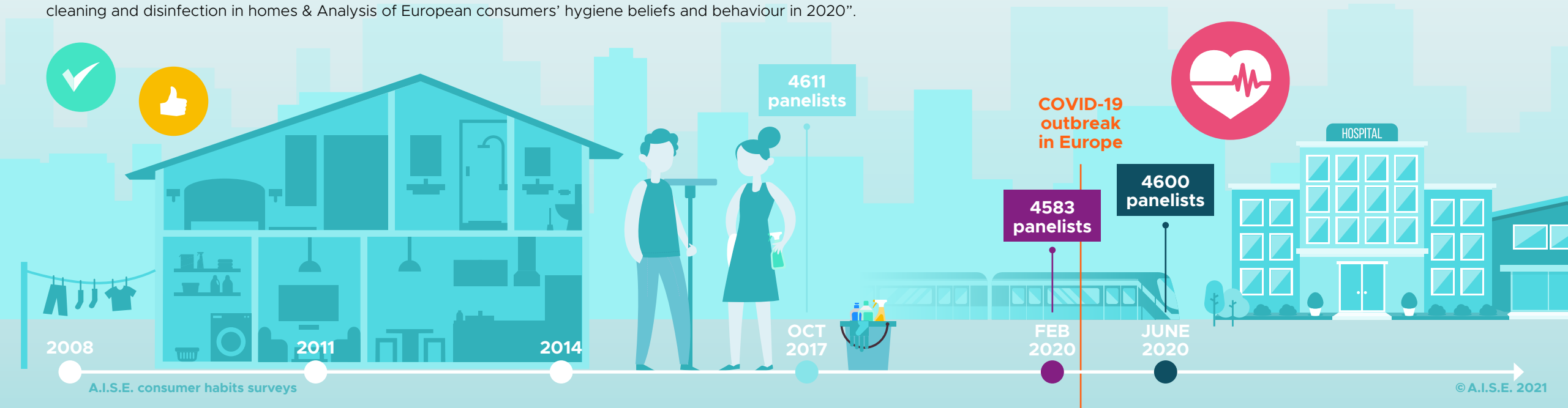
Every three years since 2008, A.I.S.E. has commissioned a pan-European survey on citizens' habits and perceptions. The objective of this exercise is to find out about perceptions vis-à-vis the cleaning and hygiene products industry, as well as to monitor habits and their evolution, in the domains of 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 are communicated in parallel to the release by A.I.S.E. and IFH of a report entitled: "Developing household hygiene to meet 21st century needs: A collaborative industry/academia report on cleaning and disinfection in homes & Analysis of European consumers' hygiene beliefs and behaviour in 2020".

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.



PART ONE:

EU CITIZENS PERCEPTIONS ON CLEANING & HYGIENE

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**



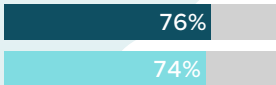
It's important to prevent infections through **good hygiene practices**, but it is also important **not to be obsessive** about cleanliness in our homes



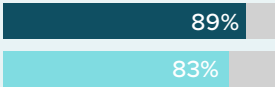
When my place is clean, it gives me **peace of mind**



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



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

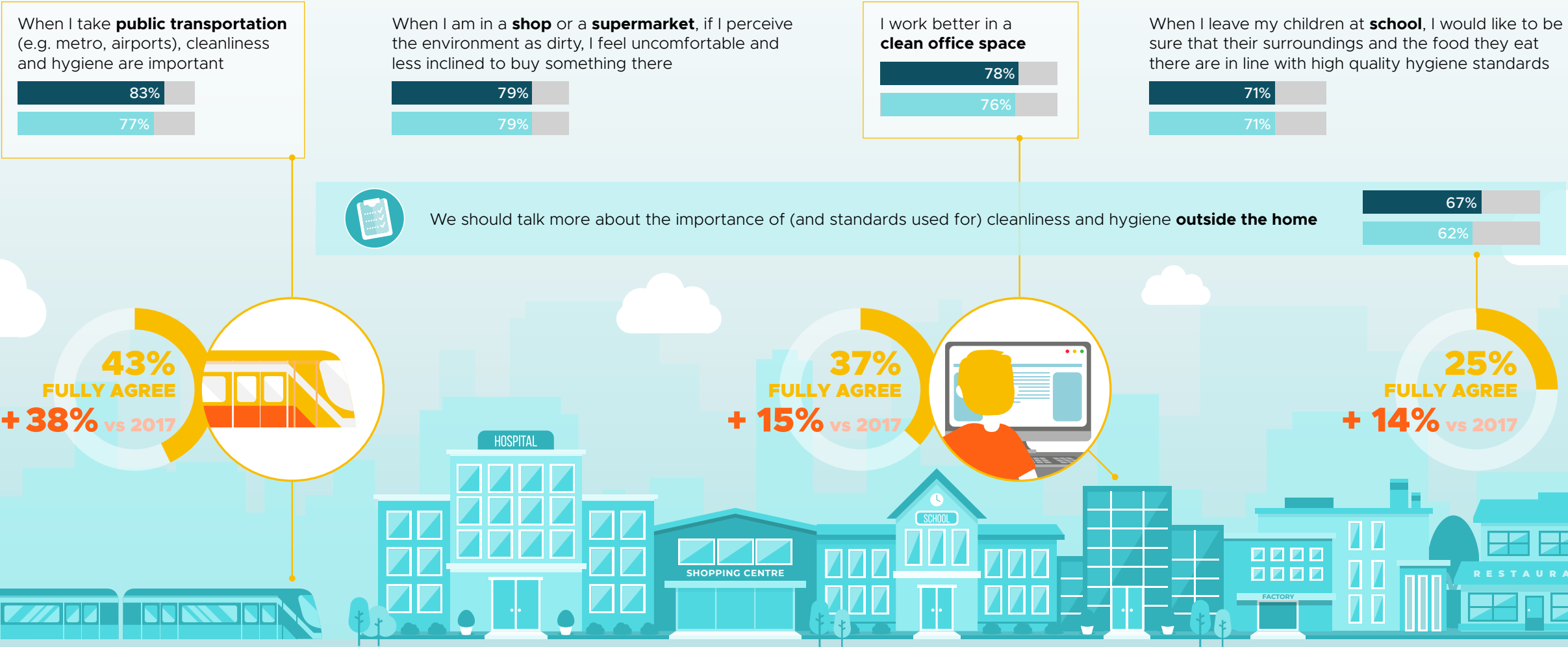


Citizens 'confirm' that..

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



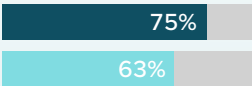
Citizens 'fully agree' or 'agree' June 2020 Oct 2017 Citizens 'fully agree' June 2020 +/- %: Relative difference vs former benchmark, and likely COVID-19 effect

Cleaning & hygiene industry

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

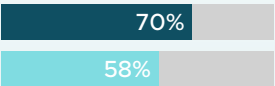
The cleaning and hygiene industry...

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



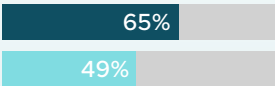
+ 19%
vs 2017

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



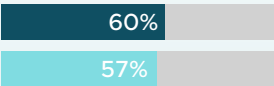
+ 21%
vs 2017

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

PART TWO:

FOCUS ON HYGIENE, TARGETED HYGIENE, DISINFECTANTS

Summary findings
all details available from:

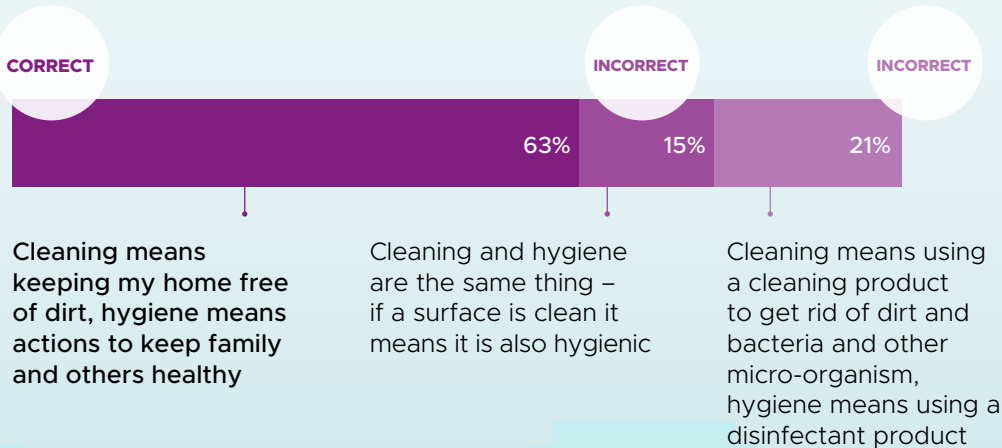


The key role of hygiene in the 21st century to maintain or promote good health

The COVID-19 pandemic, the threat of other infectious diseases which are difficult to cure and several other issues demonstrate the vital role of hygiene in home and everyday life to prevent the spread of infectious diseases

European citizens have different interpretations of the terms “cleaning” and “hygiene”.

“What does the word hygiene mean to you and how is it different from cleaning?”



As the survey results have shown that consumers may not have a clear picture on the relevant terminology, let us set the stage by providing a common set of definitions and principles

COMMON DEFINITIONS AND PRINCIPLES shared by A.I.S.E. and IFH:

- **Hygiene** is the practice through which people maintain or promote good health by breaking the chain of infection. Practices to make themselves and their surroundings (e.g. surfaces, hands, surroundings and items of personal use) clean by cleaning and – when needed – disinfecting all contribute to hygiene. Other hygiene measures include for instance keeping a certain distance from people who are infected and wearing masks.
- **Cleaning** is the mechanical or chemical removal of dirt and soil from the human body, an object or an area.
- **Disinfection** is the targeted use of a disinfectant to help prevent the spread of infection in situations where there is high risk of transmission of harmful microbes (e.g. when someone is infected or is vulnerable to infection). These products prevent the spread of infection by deactivating or killing harmful organisms.
- **Targeted Hygiene** means focusing hygiene practices **at the moments and in the places that matter** to break the chain of infection and reduce the risk of exposure to harmful microbes.

Targeted Hygiene in practice

The 9 key moments when hygiene really matters are when you:

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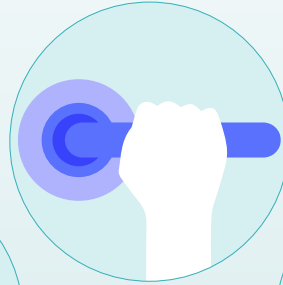
1.
Handle
food



3.
Use the toilet
or change
a baby's nappy



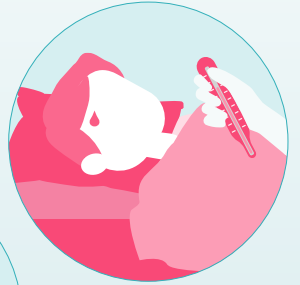
5.
Touch surfaces
frequently touched
by others



7.
Care for
domestic animals



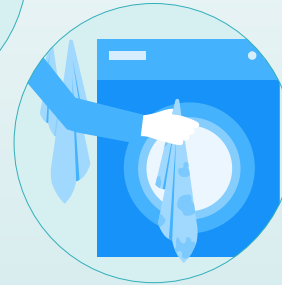
9.
Care for an
infected family
member



2.
Eat with
your fingers



4.
Cough,
sneeze and
blow your nose



6.
Handle and launder
dirty clothing and
household linens

















8.
Handle and
dispose of rubbish

CALL TO ACTION

If we practice good hygiene at each of these moments, this will deal with most of the risk of spread of infection in our homes.

The critical contact points at the 9 moments for hygiene

Critical contacts points for transmission of pathogens ▶							Others
▼ 9 moments for hygiene		Hands	Hand contact surfaces	Food contact surfaces	Cloths/sponge/pads used to clean surfaces	Clothing, towels, bed linens	
	1. During food handling	✓		✓	✓		✓ Cooking utensils
	2. Whilst eating with fingers	✓					
	3. Using the toilet or changing a baby's nappy	✓	✓ e.g. toilet handle, seat and lid, tap handles, toilet door		✓	✓ Hand towels	
	4. Coughing, sneezing and nose blowing	✓	✓		✓		✓ Tissues
	5. Touching surfaces frequently touched by other people	✓	✓ Door handles, hand rails		✓		✓ Stair rails TV remotes, computer keyboard, shared mobile device
	6. Handling and laundering clothing, towels and bedlinens	✓				✓ Esp. clothing in close contact with the body, hand and bath towels, bedlinen, facecloths	
	7. Caring for domestic animals	✓	✓	✓	✓		✓ Pet feeding utensils, pet bedding utensils
	8. Handling and disposing of rubbish	✓	✓ Refuse bin lid		✓		
	9. Caring for an infected family member	All 8 moments above apply. If someone is infected, the risk of infection spreading to other family members (if the above actions are not carried out rigorously) is higher.					

To what extent do people’s perceptions of infection risk dictate their actions?

Various scenarios occur

For some high risk actions, there is good risk awareness and consumers reported acting accordingly. For others (e.g. cleaning cloths¹ and care of pets), risk awareness is poor and corresponding reported hygiene behaviour is also relatively limited. For some actions (e.g. cleaning the floor), there is an overestimation of risks.



² This is what people reported to be doing. It may deviate vs what they do in reality and can only be checked in a behaviour study. Nevertheless, these findings provide interesting consumer trends about hygiene knowledge and reported actions.
³ This is placed in Medium risk but can be a Low risk if all household members are healthy, or it can be a High risk if someone in the household has infections with fungi (athlete's feet, candida), or norovirus (stomach flu).
⁴ Risk will increase where there is a crawling baby on the floor who may become exposed.

Has the COVID-19 pandemic affected consumers hygiene beliefs and behaviours?

Hygiene promotion during the pandemic seems to have had partial impact on consumer awareness and behaviour

► Zoom in on two COVID-19 related actions



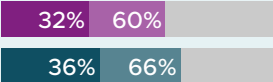
Highest risk

Medium risk

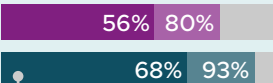
How often do you do the following?
% of people who said “always” only or “always or often”

	“always”	“always or often”

Wash my hands with soap after sneezing into my hands



Wash my hands when I get home from school, work, shopping etc



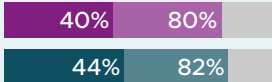
+ 21%
vs Feb 20

+ 16%
vs Feb 20

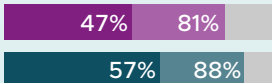
To what extent do you think the following poses a risk of causing infection?
% of people who said “high” only or “high or medium” risk

	“high”	“high or medium”

Not washing my hands with soap after sneezing into them



Not washing our hands when we arrive home from our journey from work, school, shopping etc



+ 21%
vs Feb 20

+ 10%
vs Feb 20



- Limited increase in % of people who wash their hands after coughing and sneezing between Feb and June 2020 (60% to 66%).
- But the number of people who report washing hands when arriving home **increased from 80% to 93%**.

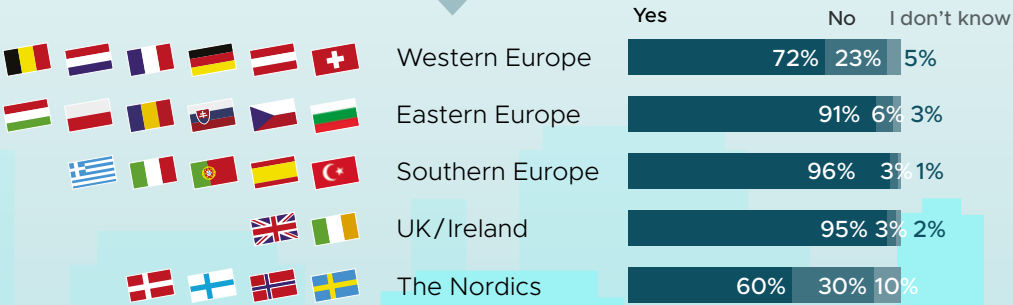
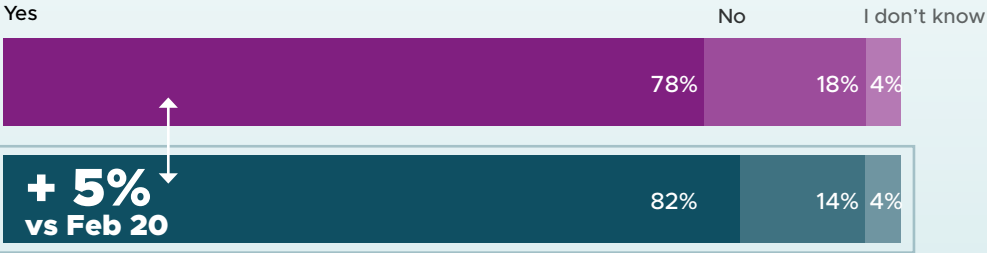
Feb 2020 June 2020

+ ...% = Relative growth rate

Use of disinfectants and understanding of how hygiene practices work to prevent transmission of infection

Usage varies across Europe, with a slight increase since the COVID-19 outbreak.
Consumers need better information about how cleaning products and disinfectants work to break the chain of infection at key moments to ensure products are used correctly.

Do you use a disinfectant/antibacterial or bleach product in your home
i.e. a product that kills/gets rid of bacteria and other organisms?



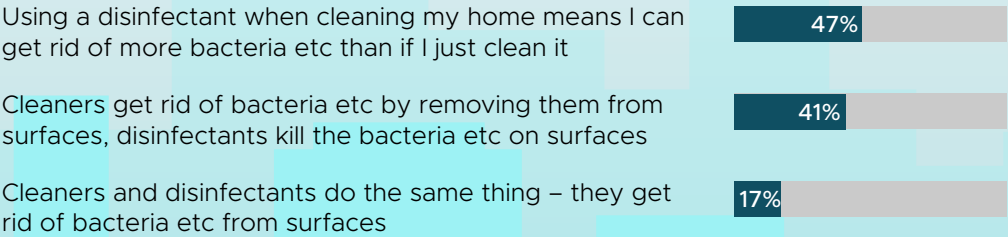
But also, consumers **agree** with the following statement:
There is no need for disinfectants in the home, cleaning is enough to protect my family from infections and other diseases

Feb 2020 June 2020 + ...% = Relative growth rate

COMMON DEFINITIONS AND PRINCIPLES shared by A.I.S.E. and IFH:

- Breaking the chain of infection can be achieved either by:
- **Physical removal** of the dirt and/or microbes, using soap or detergent-based cleaning (followed by rinsing under clean running water) or dry wiping.
 - **Killing the microbes**, using a disinfectant product or hand disinfectant or a process (e.g. heat at 60°C or above) that inactivates/kills microbes *in situ*.

When questioned about which statement they **agree with**, results below show that there is **lack of proper understanding** by EU citizens of how cleaning vs disinfection practices actually work to reduce contamination on risk surfaces.

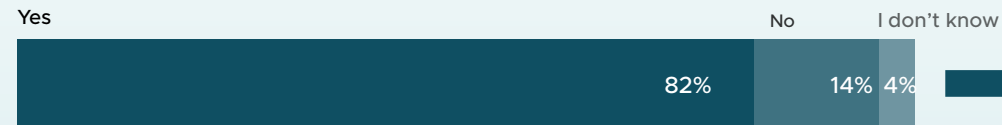


Where do people perceive a need to use a disinfectant product?

Reported uses indicate that consumers do not always use disinfectants in high risk situations where they are needed, but quite often in situations where they may not be needed.

Consumers showed significant differences in their attitudes to the use of disinfectants

Do you use a disinfectant/antibacterial or bleach product in your home i.e. a product that kills/gets rid of bacteria and other organisms?



But also, consumers **agree with** the following statements:

When cleaning my home, I only use a disinfectant in places where I think there may be harmful bacteria, viruses etc.

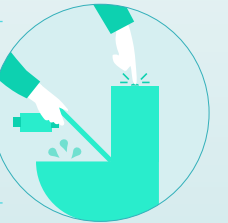
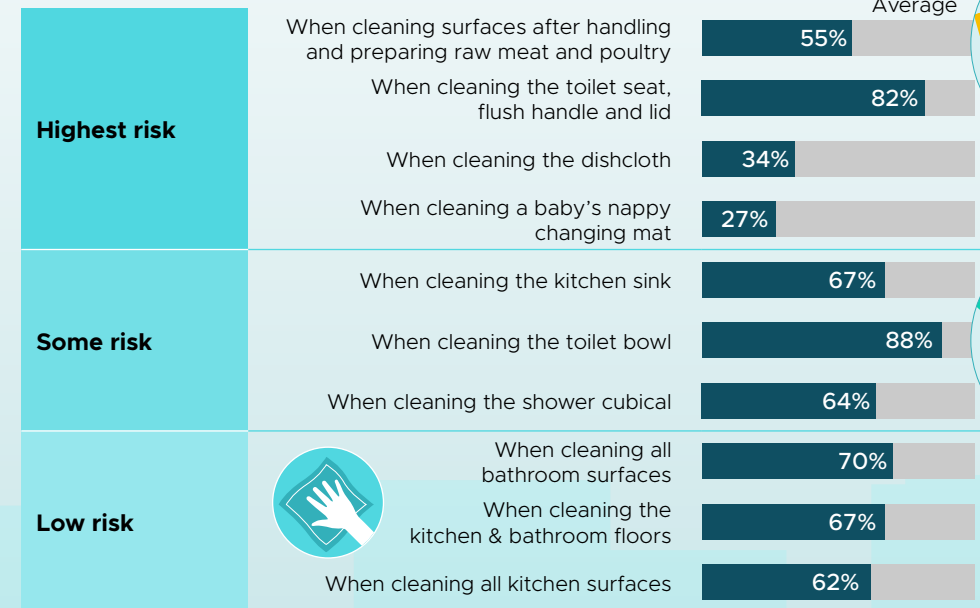


When cleaning my home, I use a disinfectant everywhere



Of the 82% of consumers who indicated that they were using disinfectants in their homes, they indicate to use those in the following situations:

In what situations might/would you use a disinfectant product?



CONCLUSIONS & RECOMMENDATIONS

There is a need to further engage consumers to:

- Develop their understanding of why and how Targeted Hygiene can prevent infection by breaking the chain of infection.
- Give clear advice and guidance on where, when and how cleaning and disinfectant products can be used to break the chain of infection.

These follow-up actions will be further assessed by A.I.S.E. and its members, in addition to advices already conveyed by A.I.S.E. on www.cleanright.eu and by IFH on www.ifh-homehygiene.org