

PAN-EUROPEAN CONSUMER SURVEY ON SUSTAINABILITY AND WASHING HABITS [SUMMARY OF FINDINGS, 2014]

Every 3 years since 2008, A.I.S.E. commissions a pan-European survey on consumer habits. The objective of this exercise is to find out about consumers' understanding and expectations linked to sustainability in general, but also to understand washing habits and their evolution in the domains of laundry and dishwashing practices.

The summary below covers the results of a survey ran in Oct-Nov 2014 covering 23 countries in Western, Southern, Eastern Europe and Scandinavia, with approximately 200 respondents taking part per country (exactly 4,741 in total – online questionnaire, recruitment via panel, men and woman, aged 18-65, responsible for purchase and using a laundry machine).

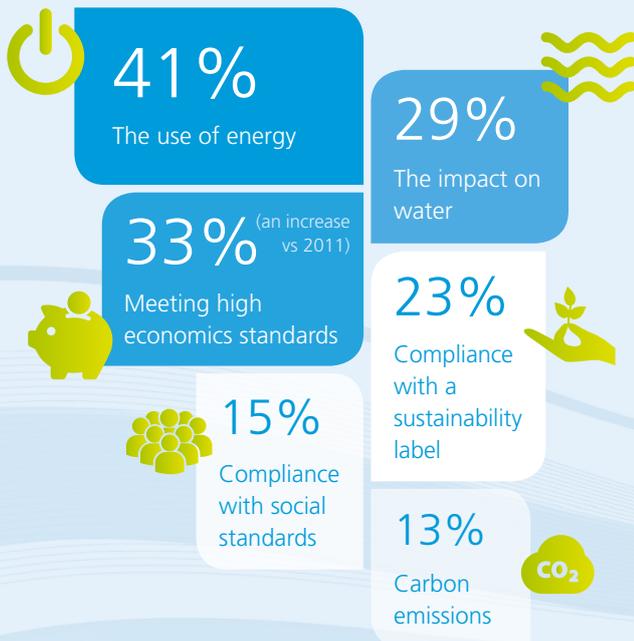
PART ONE

SUSTAINABILITY AND SOCIETY

In the first part of the survey, consumers were asked about their reaction to sustainability as well as their understanding of the topic in relation to the products they use everyday.

On sustainability in general, the 2014 survey noted an overall decline vs 2011 in terms of information interest linked to environment or social standards. Instead, preoccupations from consumers regarding economic aspects (eg costs) increased, demonstrating that it is more challenging to progress on such matters in a difficult economic context.

SUSTAINABILITY AND PRODUCTS FOR CONSUMERS CONTINUES TO BE ESSENTIALLY ABOUT:



CONSUMPTION LEVELS IN EUROPE ARE STILL PERCEIVED OVERALL AS:

56%
Too high and should be lowered

Too high and should be lowered. But this trend decreased vs 2011 (62%) and some (30%, and more in Eastern Europe) would like to see their consumption actually increase.

SUSTAINABILITY INFORMATION:

29%

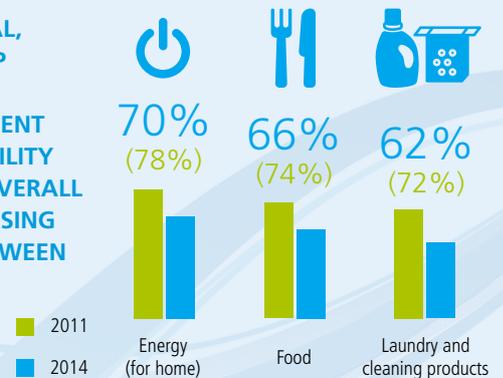
consumers believe there is enough information available on the sustainability of products.

3rd

LAUNDRY AND CLEANING PRODUCTS REMAIN IN THE 3rd PLACE FOR ADVICE AND COMMITMENT ON SUSTAINABILITY

(after energy and food, but before home products (furniture), clothing and transport/mobility).

BUT IN GENERAL, WE SEE A DROP IN ATTENTION FOR COMMITMENT ON SUSTAINABILITY AND ADVICE OVERALL WHEN PURCHASING PRODUCTS BETWEEN 2014 VS 2011



51%
Via the products packaging

30%
Via internet essentially

HOW DO CONSUMER INFORM THEMSELVES FOR OUR SECTOR?

72%
Industry as a whole

69%
Individual brands

65%
Consumers/ customers

RESPONSIBILITY FOR SUSTAINABLE CLEANING

It seems that consumers perceive responsibilities towards sustainability and cleaning in a shared way, but still with industry and brands having the lead.

PART TWO

LAUNDRY, DISHWASHING AND SUSTAINABLE CONSUMPTION: SUMMARY OF EU INDICATORS

In this section, we can see how washing habits have been varying from one survey to the next. Overall, it shows that - whilst some progress has been made on the dishwashing front - opportunities for improvement in laundry washing are still very present. This also shows how challenging changing consumer habits is...

The survey results tell us that, for the EU 28, about 94 millions of laundry washes and 78 millions automatic dishwashing loads are done every day!



LAUNDRY

3,1
a week
per household

84%
loaded

42,6°
average T°

WASHLOADS

The average number of washes a week slightly decreased to 3.1 (vs 3.2 in 2011, 3.4 in 2008) per household.

This means 34.3 billions of wash loads per year, 660 millions per week, and 3.9 millions started every hour!

LOADING OF THE MACHINE

84% of the machines are full (vs 87% in 2011, 85% in 2008).

DETERGENT AND DOSING

Regular laundry powders remain the most used type of detergent (**52% use them**). Overall, the use of liquids (**47%**) and gels/unit doses has increased (**19%** in 2014, vs **5%** in 2008). Consumers vary more often in type of products.



71% of consumers said that they had noticed this visual and **65%** claimed they know the meaning of the wash basket. But in 2014, versus 2008 and 2011, people measuring detergent has actually decreased to **66%** (vs 72% in 2011 and 79% in 2008).

Always look for the number of washes shown on the "laundry basket" icon when comparing products. The icon is helpful as it tells the number of washes for medium soil and medium water hardness (Detergent regulation requirement). This is very helpful to compare products with different concentration levels!

* Please note that the "24" wash loads is for illustration purposes only.

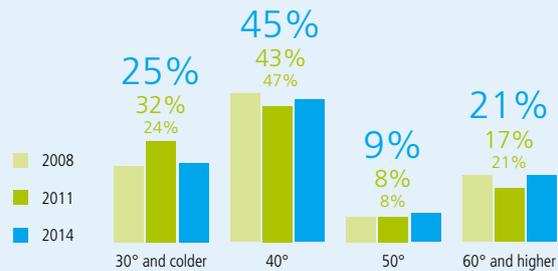
EFFORTS MADE TO CLEAN MORE SUSTAINABLY (SUMMARY)

Efforts made by consumers vs previous years to wash more sustainably are improving better on dishwashing vs laundry (where they are quite stable).

| | LAUNDRY | | DISH | |
|---|---------|------|------|------|
| | 2011 | 2014 | 2011 | 2014 |
| Avoid underfilling the machine | 67% | 68% | 46% | 69% |
| Wash at lower temperature | 67% | 58% | 32% | 45% |
| Avoid using a lot of water (or water saving programmes) | 40% | 36% | 36% | 52% |
| Purchase more sustainable products | 42% | 40% | 36% | 35% |

WASH TEMPERATURE

The average EU wash temperature in 2014 was 42,6° (fluctuating vs 41° in 2011 and 43° in 2008), and with lots of difference per region (see graph below).



Such fluctuations in the average wash temperature show that initiatives such as the A.I.S.E. www.iprefer30.eu campaign led with appliances, retailers, textile, authorities etc are important to help lower the temperature and fight climate changes issues.

DISH

60%
penetration

4,3
a week
per household

94%
loaded



DISHWASHER PENETRATION

60% with big differences in regions

DISH: NUMBER OF LOADS

4.3 per week (vs 4.2. in 2011). This means that this totals to 28.5 billions per year, 548 millions per week, and 3,2 millions of dish loads started every hour!

DISH: LOADING OF THE MACHINE

94% (vs 96% in 2011)



AWARENESS OF THE CLEANRIGHT BEST USE PANEL

25% of EU consumers have ever noticed the laundry best use cleanright panel on their laundry detergent pack.



A.I.S.E. has developed since 1997 a set of best use panels for various product categories to promote the sustainable use of products. Those are used on billions of packs in Europe. Companies can download the panels and their translations, via www.aise.eu/learn_user_info

PART THREE

SUSTAINABLE WASHING BEHAVIOUR: VARYING PROFILES ACROSS EUROPE

The following details provide an overview as to how washing and dishwashing habits differ across Europe in the different countries where the research was done. For example: Did you know that the Scandinavians are the people actually using the highest wash temperature, and the Spanish ones, the lowest?

It also shows that the penetration of automatic dishwashers varies a lot, and that consumers in UK/IRL are the people in Europe who tend to wash their laundry most often! On this basis, this allows us to target the most relevant messages that need to be promoted per region to further improve sustainable consumption patterns.

UK/IRL

Doing the laundry:
 N° of washes*: 7.5
 Average wash temperature: 40.4°C
 Washing with a full load: 83%
 Awareness of differences between regular and concentrated detergents: 67%
 Awareness laundry basket: 87%

Doing the dishes:
 Own a dishwasher: 58%
 Use for a week (n° of loads): 5.2

SCANDINAVIA
 (INCL. DK, FIN, NO, SWE)

Doing the laundry:
 N° of washes*: 5.5
 Average wash temperature: 45.7°C
 Washing with a full load: 84%
 Awareness of differences between regular and concentrated detergents: 45%
 Awareness laundry basket: 47%

Doing the dishes:
 Own a dishwasher: 66%
 Use for a week (n° of loads): 4.1

CENTRAL AND EASTERN EUROPE
 (INCL. HU, POL, RO, SLK, CZ, BU)

Doing the laundry:
 N° of washes*: 6.1
 Average wash temperature: 43.3°C
 Washing with a full load: 82%
 Awareness of differences between regular and concentrated detergents: 56%
 Awareness laundry basket: 77%

Doing the dishes:
 Own a dishwasher: 35%
 Use for a week (n° of loads): 4.4

WESTERN EUROPE
 (INCL. BE, NL, FR, DE, AT, CH)

Doing the laundry:
 N° of washes*: 5.8
 Average wash temperature: 42.4°C
 Washing with a full load: 86%
 Awareness of differences between regular and concentrated detergents: 64%
 Awareness laundry basket: 69%

Doing the dishes:
 Own a dishwasher: 71%
 Use for a week (n° of loads): 4.1

SOUTHERN EUROPE
 (INCL. GR, IT, POR, ES, TR)

Doing the laundry:
 N° of washes*: 6.3
 Average wash temperature: 40.7°C
 Washing with a full load: 85%
 Awareness of differences between regular and concentrated detergents: 77%
 Awareness laundry basket: 79%

Doing the dishes:
 Own a dishwasher: 73%
 Use for a week (n° of loads): 4.3

* in a two-week period

PART FOUR

SAFE USE OF DETERGENTS AND CLEANING PRODUCTS

Safe use of detergents and cleaning products is of paramount importance. The abstract below provides an overview of consumers' attitudes in this domain. It also shows the value for common industry on pack information such as the A.I.S.E. Safe use material (see awareness of main safe use icon) as well as specific campaigns or projects (such as "Keep Caps From Kids").

But all this needs to be done whilst taking into account the "communication clutter" that some consumers suffer from in terms of information overload.

This shows how European consumers perceive household laundry, cleaning and maintenance products in terms:

- Safety for them
- Safety for the environment

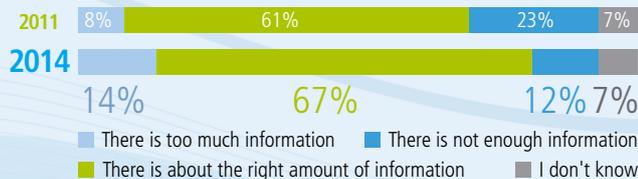
Overall this perception is slightly improving vs 2008/11).



Compared with previous years, **less people read the information on detergent packs before purchasing or using the products.**



Overall, the amount of people who agree that the amount of information on safe usage is the right amount continues to increase (driven by Eastern and Southern Europe). However, it is the first time that more consumers think **there is too much information.**



All detergent and maintenance products have to be used safely and to be always kept out of the reach of children. A.I.S.E. developed in 2014 a specific campaign for the safe use of liquid laundry detergent capsules: the multi-stakeholder campaign www.keepcapsfromkids.eu.

A.I.S.E. SAFE USE ICONS:

Most people know the meaning of the A.I.S.E. icon "keep away from children"

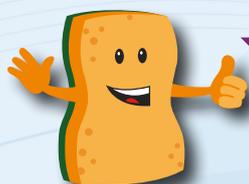
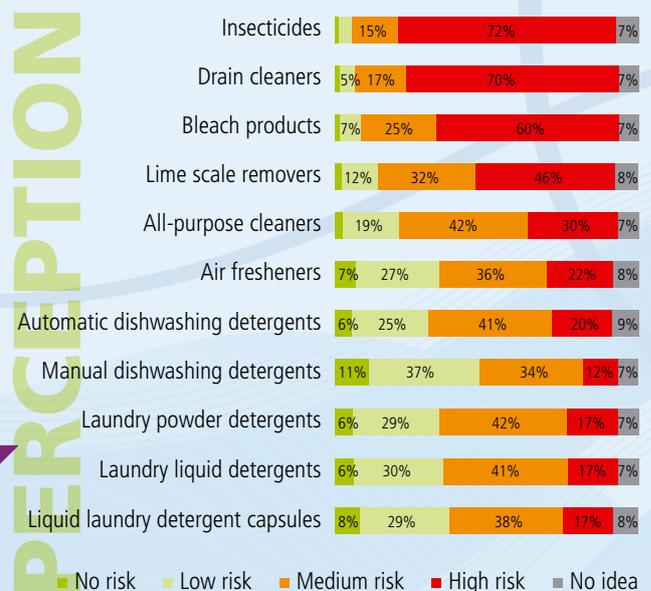


70% say they know the meaning

98% were right

A.I.S.E. introduced in 2004 a set of 12 safe use icons and sentences for voluntary use on pack, for all household products. Updates are brought to this set as and when necessary. Since then, billions of packs around Europe carry such voluntary advices to secure that products from the detergent and maintenance products sector are used safely. More info: www.cleanright.eu

Consumers perceive that **insecticides, drain cleaners and bleach products are the most dangerous products in case of misuse.** Manual dishwashing and liquid laundry detergent capsules are perceived as least risky to use.



For more information about A.I.S.E.'s activities overall, please visit www.aise.eu.

For any information related to A.I.S.E.'s consumer engagement campaigns, please visit the multi-lingual consumer portal www.cleanright.eu