

# CHANGING WORKPLACES REPORT

Revealing research into the impact of the pandemic for commercial facilities



Let's do this together



# 93%

say visibility of cleaning and hand hygiene is key

# 95%

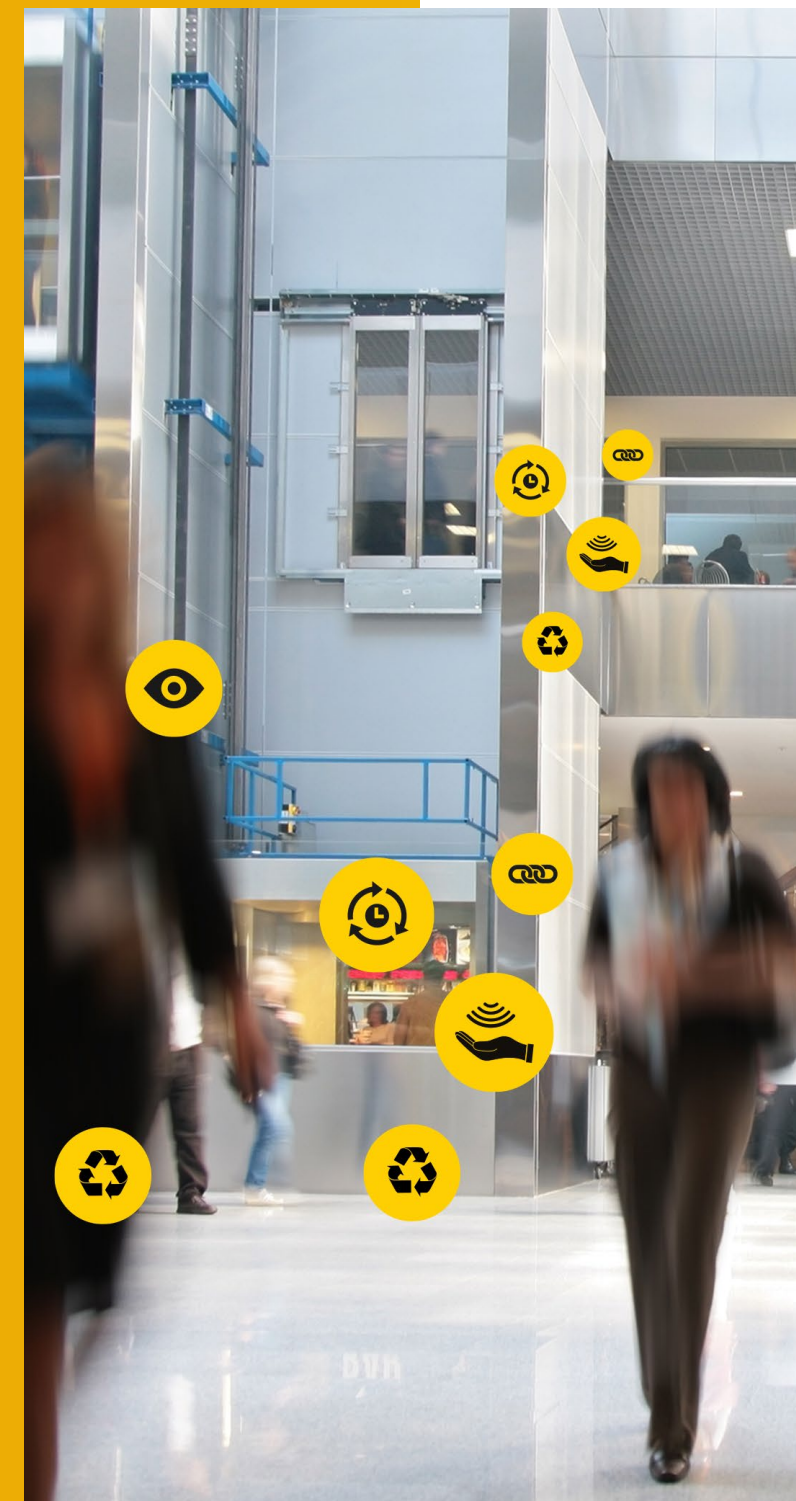
of organisations have been impacted by the pandemic. Changing Workplaces focuses on how your facility can take control



## Insights to Help You Take Control

The **Changing Workplaces** research program set out to investigate the complex changes the coronavirus pandemic spurred in workplaces and facilities across Europe.

As a leading international manufacturer of hand hygiene, cleaning, waste and recycling solutions, we know that for organisations to take control and succeed in an environment where standards and expectations are higher than ever before, they must first understand the trends and challenges the market is facing.



## Strong Response to Changing Workplaces

The international response to the Changing Workplaces survey was tremendous, with valuable input from over 300 organisations throughout Europe and beyond, across a range of sectors and business sizes: from cleaning contractors and facility management firms to educational establishments, logistics and manufacturing - to name a few.

Representing a strong cross-section of experience, two thirds of businesses that responded employ between 50 and 250 or more people and many are multi-national organisations.

We're delighted that business owners took the time to take the survey – accounting for 31% of respondents. 52% classed themselves as management or senior management, and 13% as board level executives. This level of response indicates a strong appetite for business leaders to arm themselves with knowledge that will help their organisations navigate the future.

## Impacts and the Future

Unsurprisingly, the majority (95%) of respondents agreed that COVID-19 has had an impact on their business activities, with 51% citing this impact as major. Delving beneath the surface of those impacts, the survey revealed strong, specific changes and challenges faced by facilities now and in the future.

In Spring 2021, we asked people exactly how their facility has evolved its approach to hand hygiene, cleaning, and waste management since the end of 2019, before the pandemic hit. The survey posed questions including: what changes are here to stay, how have facility users' demands changed and where do organisations need to raise the bar around cleaning and hygiene in a newly opened world?

This report outlines key learnings from the survey, shining a light on issues of the future, which span increased expectations from facility users, and the need for durable, quality solutions, due to the growing impact on brand of visibility and approach to hygiene, cleaning and waste management.

**Read on to arm yourself with knowledge that will empower your organisation to take control in a changing world.**

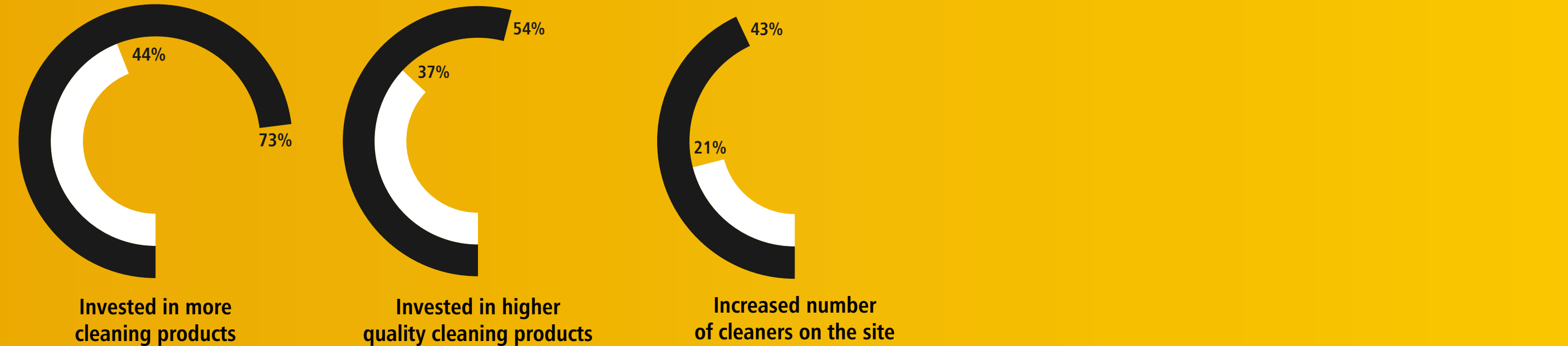
# COVID-19 prompted changes across cleaning, hygiene and waste management ARE CHANGES SET TO STAY OVER THE LONG TERM?

## We asked: what changes have you made to your operations as a result of the pandemic and which do you think are here to stay?

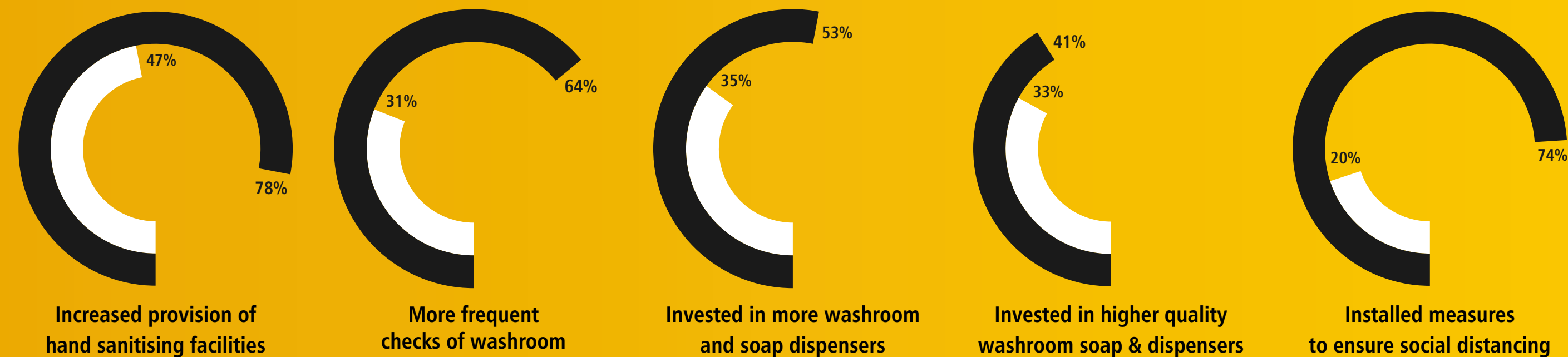
During the course of the pandemic, similar patterns emerged across both cleaning and hygiene, with organisations investing in **more, higher quality** cleaning products, and hand sanitising solutions. As for whether this will settle to become long term behaviour remains in question, possibly due to conflicting pressures.

As results show later in this report, budgets look set to become stretched in the future, which may account for the fact that only around a third of people who had invested in quality solutions during the pandemic could see this investment continuing. However, organisations will also be under the competing pressure of responding to uncompromising user expectations.

### Cleaning



### Hygiene



**54%** invested in **higher quality cleaning products** during the pandemic.

**87%** Agreed that **quality of products** influences how customers **perceive their brand**.



#### TIP: A clean start

Selecting quality cleaning products like the HYGEN™ PULSE Microfibre Mop sends out the right signals to users, who are reassured by seeing high performance cleaning products in action. Accompany this with the HYGEN™ Disposable Microfibre Mop Pads which have been proven to remove up to 99.8% of various viruses\* when combined with water alone. Usability is key in these choices too. The HYGEN™ PULSE's targeted spray function eliminates the need for a traditional mop and bucket, and helps reduce waste, while the lightweight design and non-slip handle increase user efficacy.

\*Tested against the following viruses: Methicillin-resistant Staphylococcus Aureus (MRSA), Clostridioides Difficile (C. Diff), Pseudomonas Aeruginosa (Pseudo), and Feline Calicivirus Surrogate for Norovirus.





# COVID-19 STALLED SUSTAINABILITY

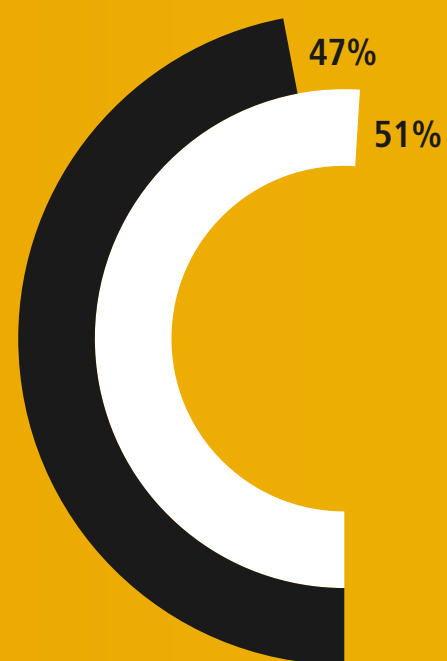
## but change is on the horizon



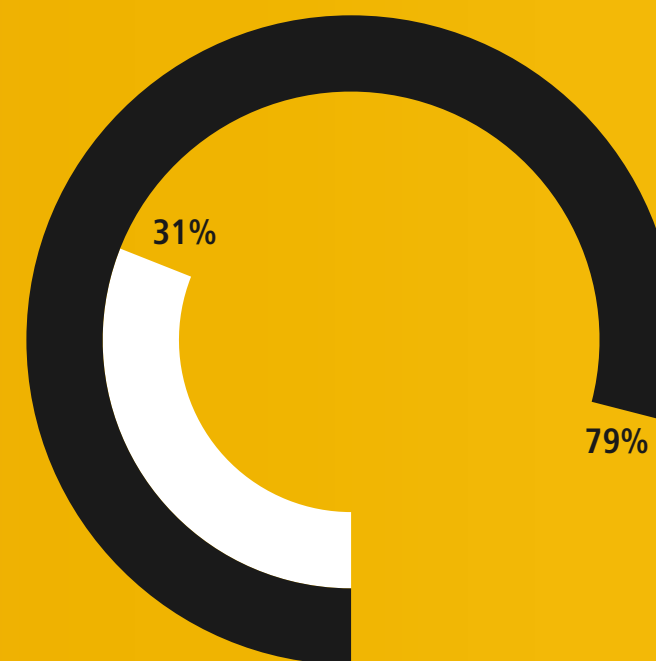
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### Pandemic's Impact on Sustainability

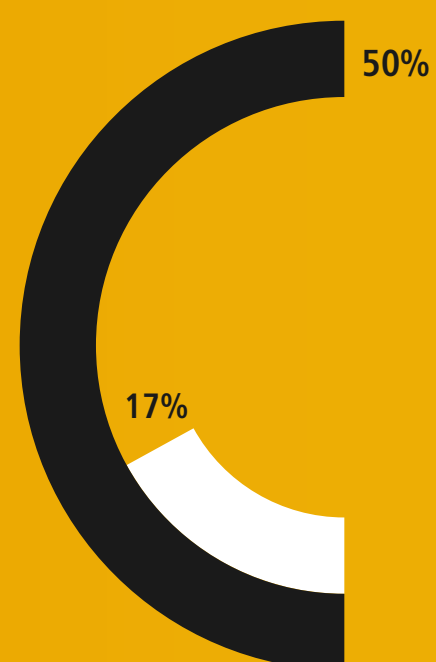
■ Changes made  
 □ Changes here to stay



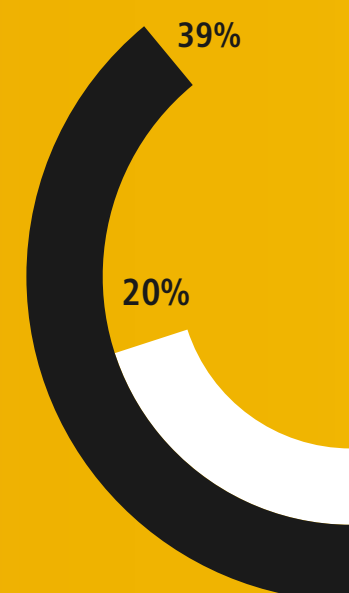
Introduced specialist waste disposal for PPE



Customers/staff using more single use products



Additional challenges managing more waste streams through your facility



Introduced a multi-stream waste/recycling system



Single use products, such as masks, gloves and cleaning equipment, impacted sustainability heavily in 2020.

A cross-category trend is clearly visible, with the pandemic driving facilities to use more disposable cleaning items. This impact is clearly an uncomfortable side effect for many, with a strong pull to move away from single use products in the future.

Respondents are also keen to address the environmental impact of increased waste over the longer term. 50% found it a challenge to manage the additional waste streams in their facility, and whilst this challenge looks set to recede, the introduction of specialist waste disposal systems for PPE is still on the agenda.

### Insight



**66%**

Invested **more in single use cleaning products** during the pandemic.

**81%**

think this **trend won't stick.**



**79%**

Said customers and staff used more single use products, **impacting waste management** in the pandemic.

**69%**

think this **trend won't stay.**

# SUSTAINABILITY IS FIRMLY BACK ON THE AGENDA

Future focus on positive environmental actions



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## Concern over sustainability to prompt post-pandemic review

**74%**

are concerned about the impact of the pandemic on their company's sustainability credentials.

We asked, in the future, to make pandemic-prompted changes more environmentally sustainable, will your business be reviewing its approach to waste management and recycling, cleaning and recycling, cleaning and hand hygiene?

Those that answered "yes" detailed below:

**Waste Management and Recycling:**  
53%

**Cleaning and Hand Hygiene:**  
Over 70%

## What will you do differently in future?



On Waste Management and Recycling:

- "Always have high standards, well above the required"
- "More segregation and proactive management of waste streams and seeking to minimise waste"
- "Sort trash, use eco-friendly product"



On Cleaning:

- "Emphasis on the importance of quality cleaning and quality hygiene"
- "Eco friendly programme"
- "Change the composition of disinfectants"



On Hand Hygiene:

- "Look at foam dispensers to lengthen product lifespan while keeping costs low"
- "Keeping hand hygiene stations and campaigns on this"
- "Better quality products"

# COVID-19 CAUSED CHALLENGES IN CLEANING AND HYGIENE

But how do these challenges play out in the future?



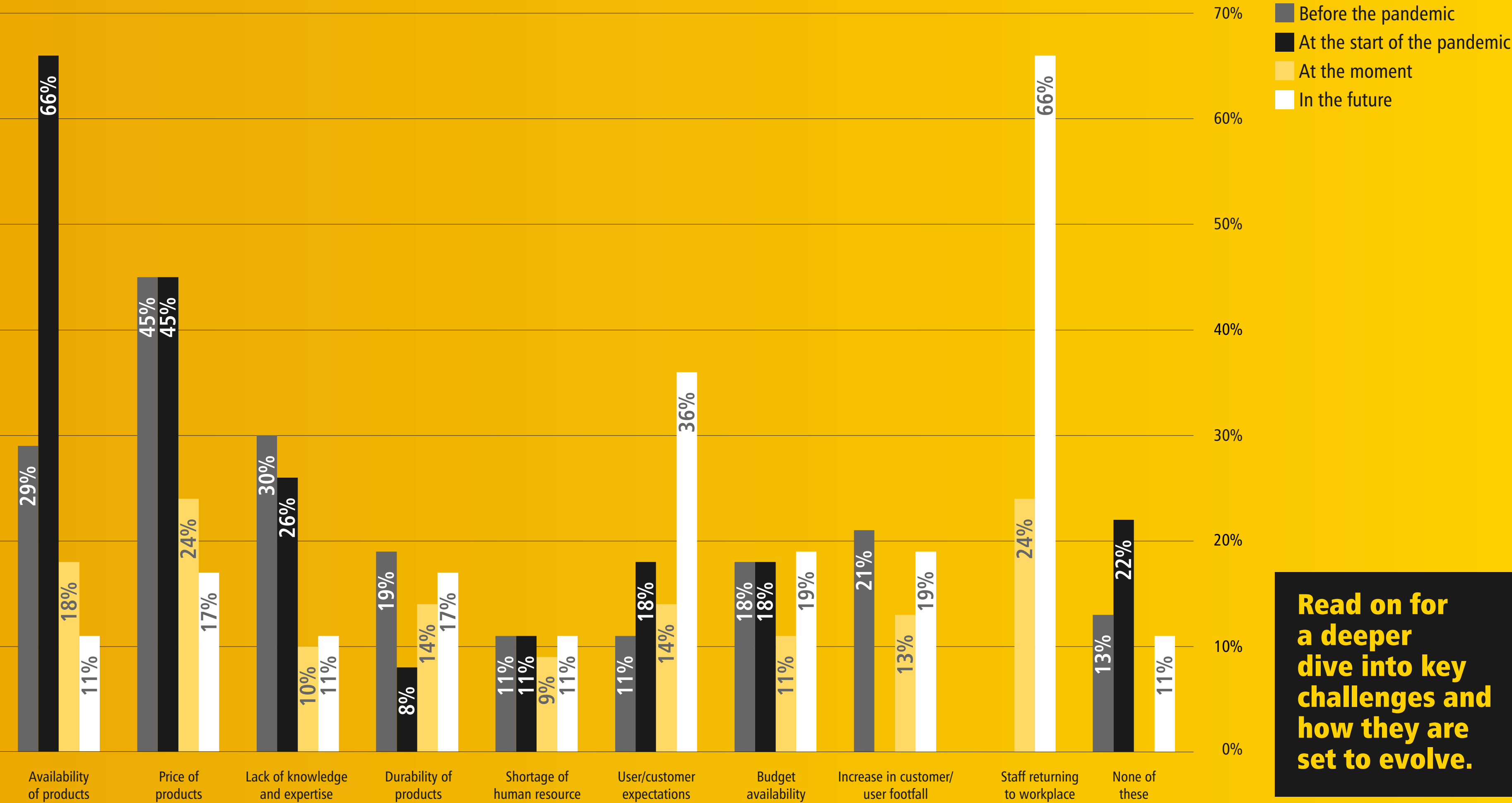
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**We asked about the cleaning and hygiene challenges organisations faced before - and at the start - of the pandemic. We wanted to compare these to issues they faced in Spring 2021, and what they thought lay ahead as challenges of the future.**

The results reveal a constantly changing picture. Whilst in the early days as the world struggled to respond to an unprecedented situation, availability of product and lack of knowledge and expertise caused concern, as we emerge from the depths of lockdown, increased footfall and user expectations are high on the agenda.

## Challenges in Cleaning and Hygiene



**Read on for a deeper dive into key challenges and how they are set to evolve.**

# KEEPING PACE WITH CHANGING CLEANING AND HYGIENE CHALLENGES

The nature of cleaning and hygiene challenges is evolving



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## Challenges

### Key Challenges

**Increase in Durability**  
Durable solutions will be 45% more important in the future, compared to pre-pandemic.

**45%**  
consider more important

**User/Customer Expectations**  
Pre-pandemic only 18% found user and customer expectations a challenge but this has doubled, with 36% seeing it as an issue in the future.

**36%**  
Identify as a future challenge

**Higher Footfall**  
85% said higher footfall would be a challenge, across staff returning to work and increase in customer and user footfall.

**85%**  
face as a future challenge

### Changing Challenges

**Availability**  
Short term concerns that prevailed over the last year around availability are set to recede, leaving in their place an understanding that the pandemic has created a paradigm shift in how customers and users perceive organisations' space, with heightened awareness of cleanliness and hygiene. This added pressure on businesses is set to stay over the long term.

**Price**  
Whilst product price is highlighted as a future challenge by only 17% of respondents, compared to 45% before and at the start of the pandemic, it is still the second most important consideration when selecting new products.

Smart facilities will succeed by selecting the right products that provide long-term effective cost in use.



**Read on to protect your reputation with solutions that show you care.**

# COVID-19 CAUSED CHALLENGES IN CLEANING AND HYGIENE

But how do these challenges play out in the future?



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## Themes

### Visibility, Quality, Frequency

Visibility, frequency and quality of products are key to protect your brand's reputation. Increasing the quantity of hand hygiene solutions isn't enough if you can't tick the quality box for users.



Does **visibility** of hygiene and cleaning measures influence your facility users' perceptions of your company's brand or facility?

**59%**  
Strong influence

**34%**  
Some influence

**7%**  
No influence



Does the **quality** of the hygiene and cleaning products you provide/use influence your facility users' perceptions of your company's brand or facility?

**41%**  
Strong influence

**46%**  
Some influence

**13%**  
No influence

## Actions

### Show Users You Care

Make staff feel comfortable through effective, quality solutions in cleaning and hygiene and signpost the measures you have taken.

Consider user flow through your facility with highly visible solutions at key points.

Installing sanitiser stations in building entrances and exits is now standard. However, respondents believe there is still work to be done on room entrances and exits.



#### TIP: Visible Solutions

When it comes to signs of visible cleaning, deploying well stocked, attractive cleaning carts is key. The range of RCP durable carts assign space for the storage of cleaning tools, providing users with further visual reassurance of facility cleaning processes. It also means more processes can be undertaken from a single cart, ideal as higher footfall returns.



To date

**66%**

have fitted sanitisers on room exits and entrances.

This is set to rise to:

**77%**





# THE EVOLUTION OF THE SOLUTION

Performance, specification and durability growing in importance



**Product performance and durability are set to be crucial determining factors in future product selection. A growing interest in product specification indicates it is a signal of quality, more so than simply the brand of product used.**

We asked respondents to rate the most important factors to them when choosing cleaning and hygiene products for their workplace or facility. Crucially we wanted to compare the rankings before the pandemic to people's predictions for the future.

## Performance and Durability

PARAMETER	IMPORTANCE SCORE*		
	PRE-PANDEMIC IMPORTANCE	FUTURE IMPORTANCE	TREND
Product performance	3.1	2.7	▲
Cost of product	3.3	3.5	▼
Product easily available	3.7	3.6	▲
Specification/certification	3.8	3.6	▲
Well-known and trusted brand	4.3	4.6	▼
Durable products	4.5	4.4	▲
Able to add bespoke branding	5.5	5.7	▼

\*Score based on respondents ranking parameters by importance, 1 being the most important and 7 being the least important. Trend indicates an increase or decrease in importance.

## Long Term View on Hand Hygiene

In an indication that product specifiers are looking for long term solutions, there has been a shift since the early days of the pandemic in the type of sanitiser solutions selected.



### TIP: Our Solution

RCP's innovative LumeCel™ AutoFoam dispenser provides continuous hand hygiene, with battery-free and touch-free foam delivery. The no-touch design reduces the risk of contact with bacteria and its hygienically sealed refills avoid cross-contamination, keeping soap and sanitisers fresh.



# 59%

**increase in people who would choose a touch-free refill dispenser stand in future.**

### Insight

This evolution reflects the demands being placed on facilities for more hygienic solutions, as users express heightened concern about touching surfaces.

# INVESTING FOR A FUTURE-FIT FACILITY

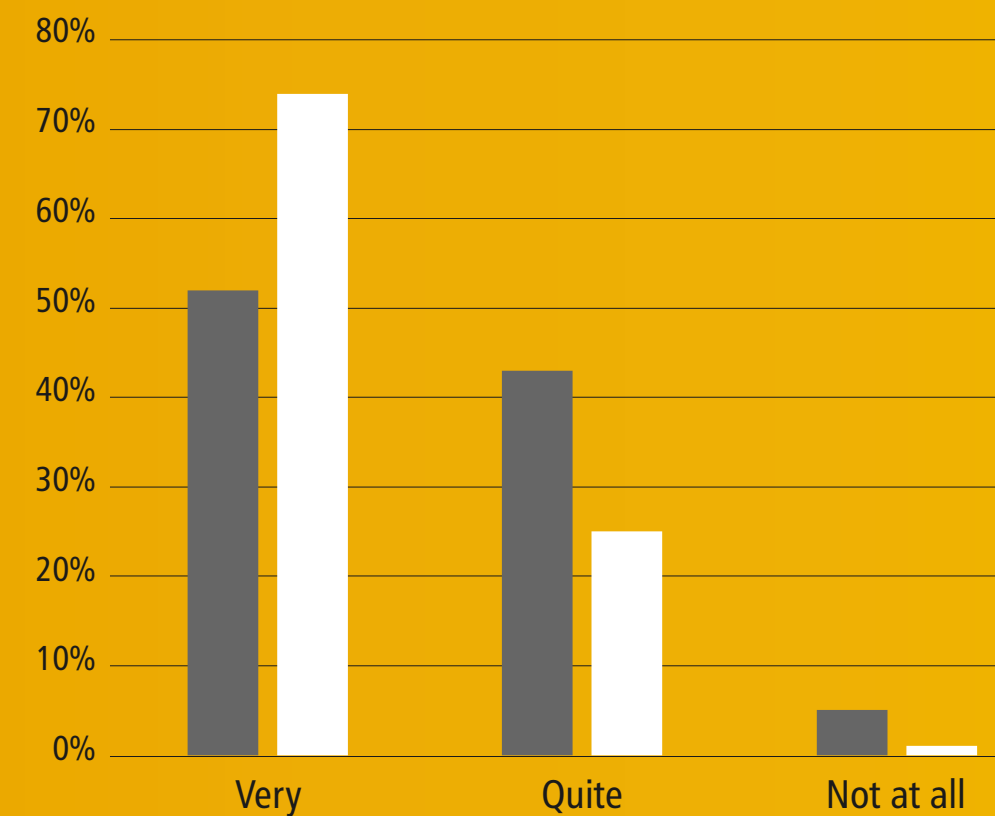
From training to budgets for cleaning, hygiene and waste management, here we look at where organisations invested and will continue to invest in the future.

## Knowledge and Education

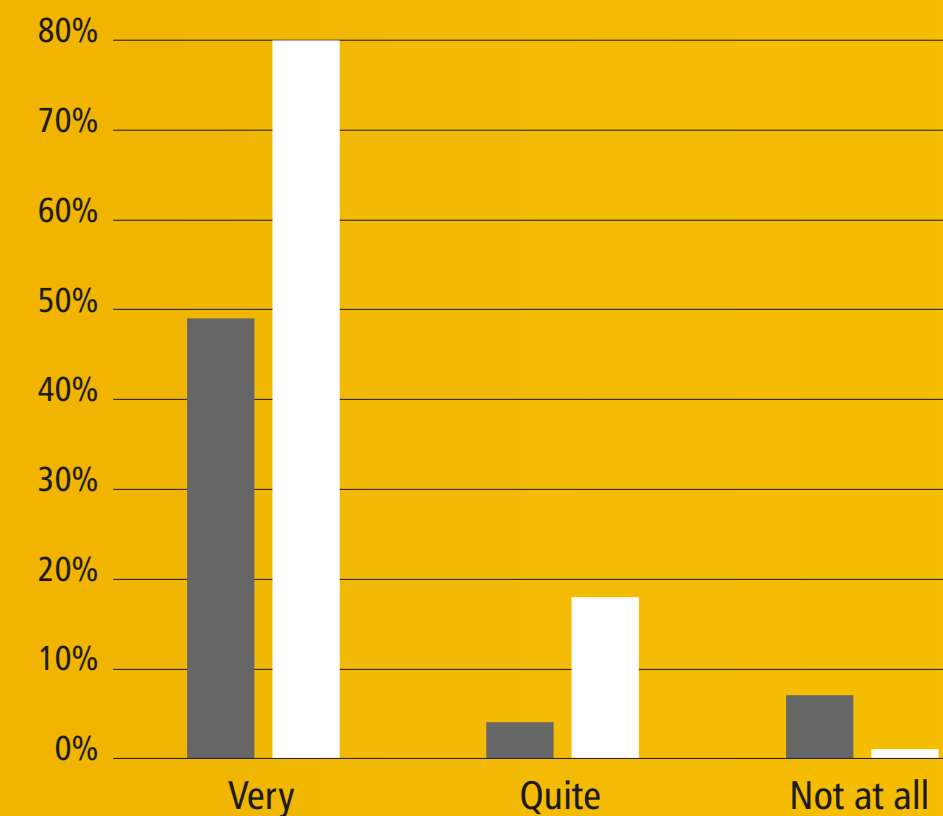
As a result of the pandemic, 81% of respondents upskilled staff with additional training in cleaning, hygiene and waste management.

We asked how knowledgeable businesses felt about Cleaning, Hand Hygiene and Waste Management. Here are our findings:

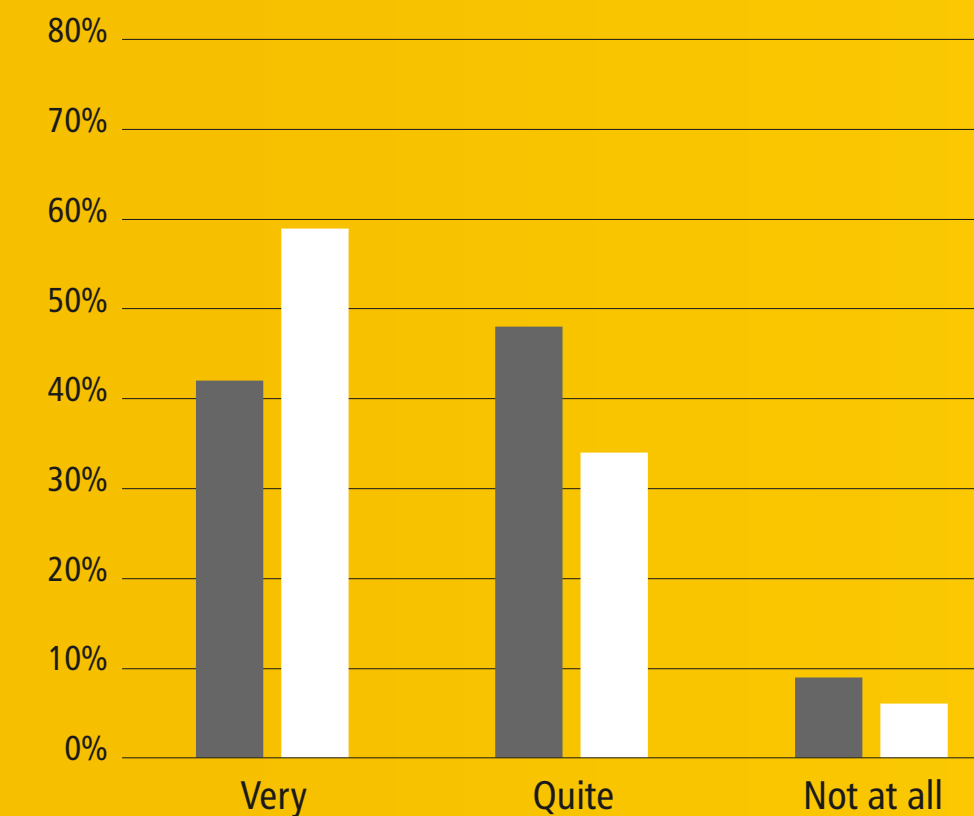
### Cleaning



### Hand Hygiene



### Waste Management



### Thought Starter

How can you cascade the rich knowledge gained by the senior management – the typical profile of participants in the Changing Workplaces research – through the teams in your organisation?

RCP's [resource centre](#) is a great starting point where you can find everything from signposting tools to best practice case studies and downloadable user guides.

In-company 'toolbox talks' sharing what you have learned when sourcing cleaning, hygiene and waste solutions to those using the products could also help embed a culture of continued improvement. For further insights, read our blog on tailoring training to your organisation's needs.



**51%** believe more training is needed.

**36%** engaged services of specialist consultants in cleaning, hygiene and/or waste management.

**80%** of respondents now class themselves as very knowledgeable about hand hygiene.

That's a **61% increase** compared to pre-pandemic.

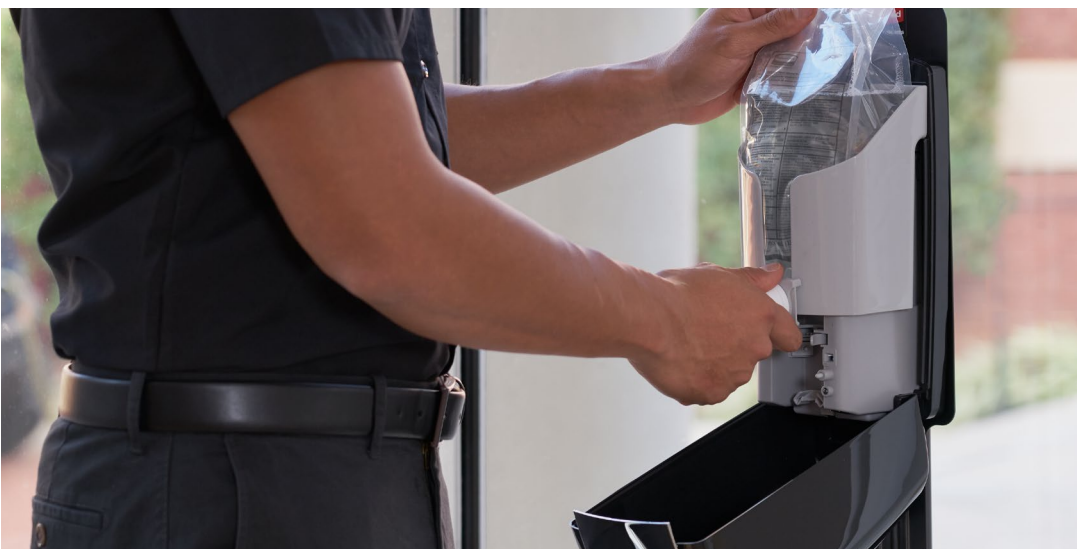


# INVESTING FOR A FUTURE-FIT FACILITY

Smart organisations set to invest in future-proof solutions

## An Eye on Budget

Where a dramatic **85% uplift** has been seen in cleaning and hand hygiene budgets during the pandemic, compared to a **42% boost** to recycling and waste management budgets, the longer term shows a reversal in fortune, with 50% of people agreeing waste and recycling budgets will increase in future.

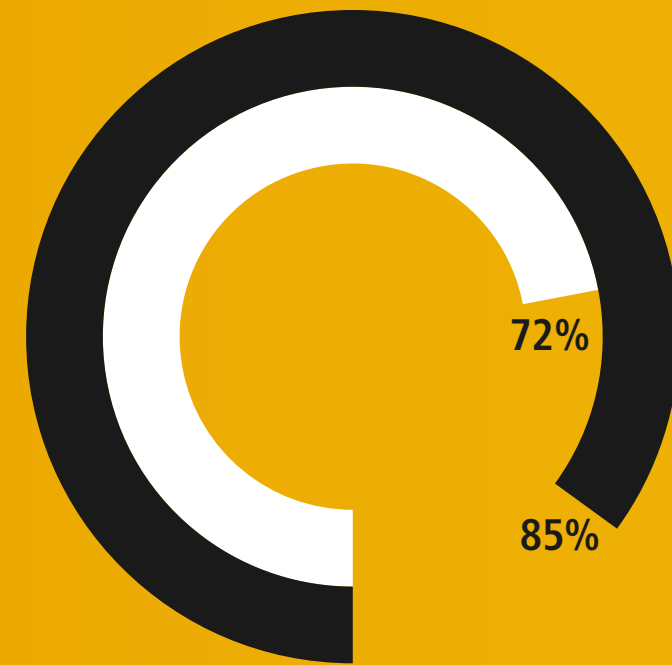


### TIP: Our Solution

It's not just your choice of dispensers and stands that will impact your bottom line, but your choice of soap and hand sanitiser too. Buying in 'bulk' may seem like an economical idea, but in fact the amount of product dispensed per use from 'bulk-fill' solutions makes the opposite true.

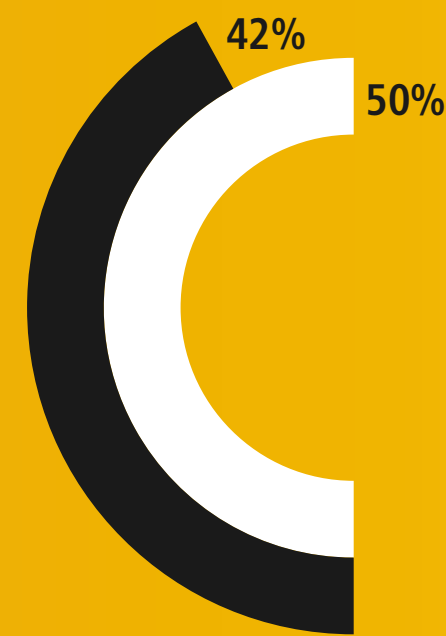
Hygienically sealed refills keep soap and sanitisers fresh and free from cross-contamination. Their concentrated dosing also means more applications per refill, offering better cost in use.

### Cleaning and Hand Hygiene



Budget increased

### Waste and Recycling



Budget increased

## Insight

Companies can safeguard future performance in cleaning and hygiene by investing wisely now, whilst budget remains available.

Purchasing decisions should be made with a view to the long term, with quality, durable solutions that will provide low cost in use well into the future, for example sealed refills, durable dispensers and foam solutions.



# CHANGING WORKPLACES REPORT

Key takeaways for a future-fit facility

CHANGING  
WORKPLACES



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For more insights, visit: [rubbermaid.eu](https://www.rubbermaid.eu)



**DURABILITY AND  
QUALITY ARE VITAL**



**VISIBILITY OF CLEANING AND  
HYGIENE REASSURES USERS**



**SUSTAINABILITY  
IS BACK ON THE AGENDA**



**USER EXPECTATIONS  
ARE HIGHER THAN EVER**