

Meeting consumers' hygiene expectations in the Covid-19 world



How has Covid-19 impacted comfort levels, behaviours and expectations in relation to hygiene? We conducted both a consumer and industry study to find out how people really feel and what they want to see from businesses and in public settings. This paper presents key findings and suggests how businesses might respond with targeted innovation.

What consumers want in the Covid-19 world

There's no doubt that hygiene has taken on new significance in the wake of the Covid-19 pandemic. But what do consumers really care about in relation to hygiene? And has this changed in the past 12 months? That's what we set out to discover in October 2020 with a representative survey of adults in Great Britain. We also conducted a B2B survey of key decision makers across sectors to see how business feels consumer behaviour would drive change in their business.

In this whitepaper, we present the key findings and consider how they may influence new product development in the coming months and years. We also look at processes and technologies which could play a lead role improving the hygiene of products, devices or other items that are frequently touched.

The ramifications of people's attitudes and expectations in relation to hygiene impact virtually every industry sector and workplace. This is especially true of public venues, shops, offices, factories and leisure or travel facilities where there is a high throughput of people or where people need to touch surfaces.

While everyone hopes that 2021 will see the decline of Covid-19, it's likely that hygiene will remain front of mind for some time to come. It's no longer a hygiene factor; it increasingly needs to be treated as a competitive differentiator.

About the research

The survey involved 2,160 people and is representative of the GB adult population. It was carried out online between 5-6 October 2020. At this time, there were no national lockdowns in force and England's 'three tier' system had not yet been introduced. However, local measures to control the spread of Covid-19 were in place in some regions.



How hygiene attitudes have changed

A headline finding from the research is that 80% of Brits say they are now paying more attention to handwashing and cleanliness. This might be expected during a pandemic of this nature. However, once you ask 'why', the situation becomes less straightforward.

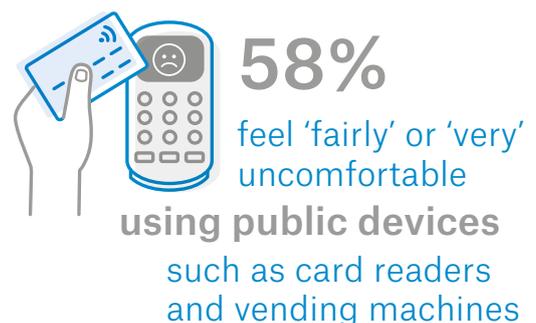
We found that 70% say it's because they can't be sure other people share their hygiene standards. Yet the findings also show that most people feel a high level of personal responsibility: 71% want to reduce their risk of infecting other people and 65% want to do everything they can to protect their family. Just over half (54%) said they want to follow the recommended government guidelines.

This snapshot reveals some of the conflict and complexity of the consumer response to Covid-19 in general as well as current attitudes towards hygiene.

Hygiene hotspots

We also asked people to rate how comfortable they felt in various scenarios or taking part in different activities at the time of the survey. Two situations made more than half of GB adults feel 'fairly' or 'very' uncomfortable: using public devices such as card readers and vending machines (58%), and using public toilets (54%).

These findings indicate how damaging people's hygiene concerns could potentially be for trade and industry. If people don't want to touch card readers, will they avoid bricks and mortar stores altogether, or curb in-store spending to keep it below the contactless payment threshold? What about shared devices and machines in the workplace? Similarly, if people don't want to use public toilets, will it prevent them from visiting restaurants, going to the cinema or taking the family on a day out? Putting people at ease so they feel more comfortable about these things again could play a vital role in economic recovery.



It may be that businesses need to become more transparent, or even vocal, about their approach to hygiene. This appears to be far more important to consumers than other methods to reduce the risk of Covid-19 infection. When we asked people to name the **single** most important thing a business can do to reassure customers, regular cleaning was the top response (32%). For comparison, 26% said all staff wearing face masks was most important to them, and for 14% it was the availability of hand sanitiser.



However, people may prefer to see multiple measures in place. When asked to name **any** measures that they found reassuring, the top five were regular cleaning (mentioned by 85%), hand sanitiser availability (84%), all staff wearing face masks (77%), social distancing signs (71%) and a booking in process (65%).

The environmental question

While consumers are more concerned about hygiene than they were 12 months ago, environmental considerations still rank high in their priorities.

Only a few individuals (ten respondents out of 2,160) indicated that extra packaging on products would be reassuring for them. In fact, 47% said they worry that there has been an increase in the use of single-use plastic due to Covid-19 and 40% worry that the topic of climate change has taken a back seat.



Sector spotlight

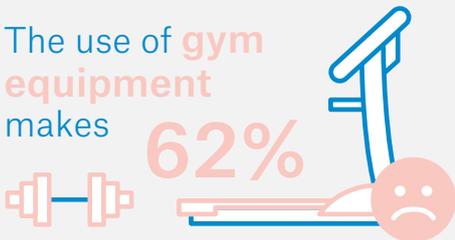
When we looked at people's levels of comfort taking part in various leisure activities, there were some interesting nuances between different scenarios.

Where do people feel uncomfortable?*



When it comes to **group classes**,
67% of gym-goers now feel uncomfortable

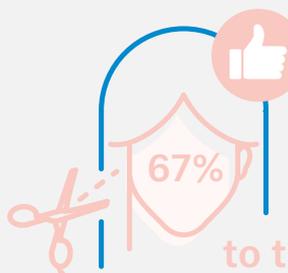
The use of **gym equipment** makes **62%** 'fairly' or 'very' uncomfortable



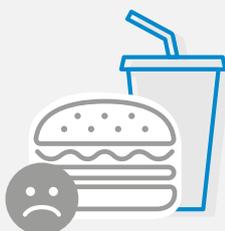
of people are 'fairly' or 'very' comfortable about going to a **beauty / nail parlour**



of people are 'fairly' or 'very' comfortable about going to the **hairdresser**



56% of people who use **fast food outlets and cafes** feel 'fairly' or 'very' uncomfortable



feel 'fairly' or 'very' comfortable in **restaurants with table service**



*% based on numbers of people who take part in these activities, not the full sample

Hospitality

On the whole, most people do feel comfortable about eating out. However, a large percentage don't. This is more pronounced in fast food outlets and cafes; 56% of people who use these outlets say they feel 'fairly' or 'very' uncomfortable. Restaurants with table service fare better, with 67% feeling 'fairly' or 'very' comfortable and 31% not feeling uncomfortable.

Hair and beauty

People who use hairdressers and barbers are much more comfortable doing so than people who use beauty or nail parlours. We found that 67% of people are 'fairly' or 'very' comfortable about going to the hairdresser. The comfort to discomfort ratio is close to 50:50 for beauty and nail parlours.

Health and leisure

Of the activities we explored with our research, visiting the gym seemed to evoke the highest levels of discomfort in relation to Covid-19. When it comes to group classes, 67% of gym-goers now feel uncomfortable. The use of gym equipment makes 62% 'fairly' or 'very' uncomfortable.



How is industry responding to Covid-19?

Our sister company Oakland Innovation conducted a study to gauge industry responses to Covid-19 and actual or predicted changes in consumer behaviour. It found that 73% of the businesses surveyed had witnessed significant changes in consumers' purchasing habits. Moreover, 73% expect changes prompted by Covid-19 to influence R&D and innovation priorities.

Part of the survey focused specifically on personal protection and hygiene innovation and practices.

When asked where they anticipate an increase in technical innovation, 'core protection / hygiene functionality' was the leading response, selected by 68%. Further exploration revealed that chemicals or materials science innovation for solutions such as coatings is expected to be a key area of focus. This was mentioned by 48% of respondents. Almost a third (32%) anticipate innovation in mechanical or physical technologies and 20% think this is likely to relate to energy or light forms such as UV. Hybrid solutions are also expected to play a role, according to 40% of respondents.

Most respondents (71%) anticipate that products in adjacent market segments will begin to incorporate hygiene or personal protection functionality. More than half (58%) expect to see an increase in products using both chemical and physical means of protection.

The study also found that 71% believe corporate and industrial settings will be receptive to new (potentially expensive) technologies and products used alongside lower tech solutions such as increased frequency of cleaning.

When asked to name **any** measures they found reassuring, consumers named the top five as



Understanding the virus

Any strategic measures or product developments that seek to reduce potential surface transmission of Covid-19 need to be rooted in scientific understanding of the virus. There has been a surge of research into the nature of SARS-CoV-2, the strain of coronavirus that causes Covid-19. To date, this has largely focused on SARS-CoV-2 survival in different environments, its transferability and the efficacy of current and emerging techniques to inactivate the virus.

Table 1 outlines findings related to the persistence of SARS-CoV-2 and other human coronaviruses on different surface types. It's interesting that it only appears to persist on copper surfaces for up

to four hours. Temperature can also have a significant impact. According to a recent review, human coronaviruses can persist on plastic surfaces for 2-9 days at room temperature, but at 30°C this drops to 8-24 hours.¹

There doesn't appear to be any hard data on the transmissibility of SARS-CoV-2 from contaminated surfaces to hands. However, a study on the Influenza A virus¹ suggested 31.6% of viral load may transfer from contaminated surfaces to hands.

Surface type	Persistence of human coronaviruses (e.g. SARS -CoV-1 and MERS-CoV)	Persistence of SARS-CoV-2
Steel	5 days	2 days
Aluminium	2-8 hours	
Wood	4 days	
Paper/cardboard	1-5 days	1 day
Glass	4-5 days	
Plastic	2-9 days	3 days
Copper	8 hours	4 hours

Table 1: Current best knowledge of duration of survival of human coronaviruses and SARS-CoV-2 in various types of surfaces. Data from Kampf et al, 2020¹, van Doremalen et al, 2020²

Emerging scientific knowledge could inspire innovative new approaches to inactivate the virus or hinder its survival. This could present new opportunities within the hygiene and cleaning category as well as in the development and maintenance of public devices or other items that require touch operation.

New ways to reduce surface transmission

With hygiene now front of mind for many industry sectors and exerting a stronger influence on product development, interesting strategies and technologies are coming to the fore. These include chemical, physical and biological approaches as well as natural solutions with proven efficacy.

Chemical approaches

Chemicals have traditionally been central to hygiene protocols, and efforts to inactivate the virus are resulting in interesting advancements. These include the development of new chemistries to augment the functionality of existing solutions, for instance adding sensory cues to indicate whether a surface has been adequately cleaned.

Physical / biological approaches

Physical strategies to reduce surface transmission could involve electromagnetic radiation, thermal procedures and novel coatings, as well as device technology ranging from sensors to robotics. Biological strategies also hold interesting potential, for instance the use of glycoprotein on textiles to trap the virus.

Natural approaches

Solutions that combine efficacy with strong environmental credentials are likely to be a win-win for many brands and consumers. There are some interesting developments in this space including Thymox, an eco-friendly, EPA-registered cleaning agent shown to eliminate human coronaviruses within one minute of application. It is the first agricultural disinfectant in Canada to obtain UL-Ecologo certification and it is available for private labelling.³

Another exciting development is the creation of sugar-based antiviral materials in a collaboration between The University of Manchester, University of Geneva and the EPFL in Switzerland. The broad-spectrum activity of these materials against different types of viruses (herpes simplex, respiratory syncytial virus, hepatitis C, HIV, and Zika virus) shows promise of efficacy against SARS-CoV-2.⁴

Sensor and voice technology

Inactivating the virus, or reducing its persistence, is one avenue for product innovation to explore. However, there is also scope to reimagine human interactions with products, devices and high-touch items. Advancements in sensor technology and voice systems could be leveraged to significantly reduce the risk of transmission by eradicating the need to touch surfaces.

Applying the science to consumer demands

Our research underlines the need for businesses, public venues and leisure facilities to signal that measures have been taken to protect consumers and workers. Simply installing hand sanitiser dispensers at entrance points is unlikely to be enough; a more dramatic and lasting shift in hygiene is needed.

It's about taking proportionate and cohesive steps to earn and maintain people's trust and loyalty. Investing in a slick booking in process and touchless ordering is pointless if the customer toilets let you down. You have to do hygiene well - and be seen to do well - because trust is very fragile, and you might only get one chance.



73% of businesses expect changes prompted by Covid-19 to influence R&D and innovation priorities

Consider how you can get people to cross the threshold from 'I'm not comfortable doing this' to 'OK, I am comfortable now because x, y and z is in place'.

Organisations which act fast to raise the bar on hygiene in effective and visible ways have much to gain. This presents opportunities for product development teams, and for the organisations which are quick to embrace progressive new approaches.

According to our research findings, Covid-19 has made many people more aware of the role science can play informing decisions about the products they buy. This was true for a quarter of the general population (25%), increasing to 34% for the 18-24 age group. Another 43% said they were already aware of the role science can play in product decisions before the pandemic.



In our view, the biggest opportunities lie in three key areas:

Development of new hygiene approaches

Effective and efficient methods to reduce the likelihood of surface transmission in public places (e.g. new cleaning solutions; physical processes that inactivate the virus; materials or coatings that reduce viral persistence).

Development of ‘cleaner’ products

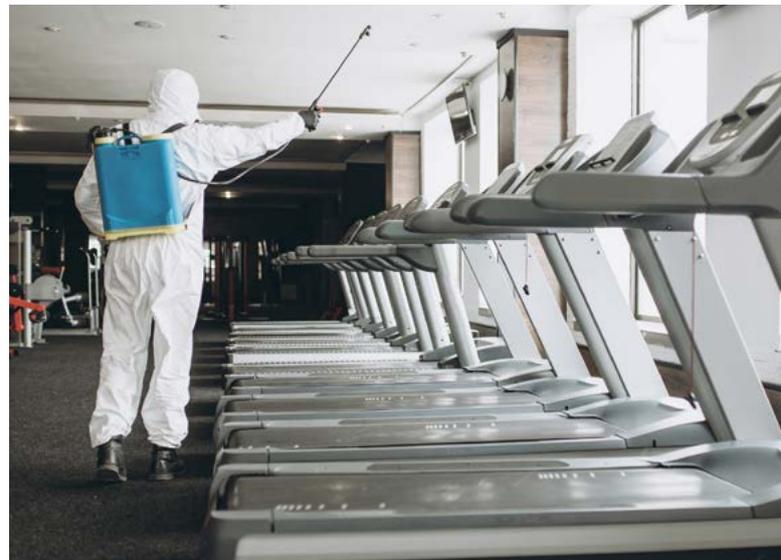
Products, devices and equipment that use materials or coatings which hinder virus survival, or reduce the need for people to touch surfaces.

Adoption of new hygiene approaches and ‘cleaner’ products

Shops, venues, travel facilities and workplaces that adopt these new approaches and technologies will be one step ahead in terms of maximising consumer (or employee) trust, helping them thrive despite the ongoing challenges.

We know from experience that some of the most interesting and effective innovations are likely to emerge from combination strategies. So, chemicals or natural solutions might be used alongside physical approaches. The industry research conducted by Oakland Innovation suggests that R&D teams are already thinking along these lines. Similarly, collaboration between industries affected by people’s lack of comfort in relation to Covid-19 and specialist players in hygiene innovation is likely to accelerate progress.

In a situation like this, speed of development is critical. It’s our belief that organisations forming strategic partnerships within this emerging ecosystem will be best placed for success. What’s more, they’ll play a lead role helping consumers, workers and the wider economy face the new normal with confidence.



1. Kampf, Günter, et al. "Persistence of coronaviruses on inanimate surfaces and its inactivation with biocidal agents." *Journal of Hospital Infection* (2020).
2. van Doremalen, Neeltje, et al. "Aerosol and surface stability of SARS-CoV-2 as compared with SARS-CoV-1." *New England Journal of Medicine* (2020).
3. <https://thymox.com/>
4. <https://www.manchester.ac.uk/discover/news/unique-new-antiviral-treatment-made-using-sugar/>

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