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STUDY OBJECTIVE

The Work/Life Balance survey was designed to probe the attitudes and behaviors of women, especially mothers, regarding housework, infectious disease and work/life balance. House cleaning can be an area of concern for busy women, especially as it relates to maintaining a healthy environment for the family.

Asthma, allergies, toxic chemicals and infectious disease are on the minds of consumers in general and the target audience for house cleaning service, busy moms, in particular. Insights on the perspectives and actions of this population help businesses understand current market dynamics and trends in this age of globalization and pandemic disease.

The study was conducted as a joint research venture between Maid Brigade, a top-ranking nationwide house cleaning service, and Mom Corps, the pioneer and leader of the flexible employment market. The two companies have formed an alliance to collaboratively help women improve the quality of their lives through work/life balance.

METHODOLOGY

The Maid Brigade/Mom Corps research project was administered via electronic (online) survey. Invitations to complete the survey were disseminated via banner ads, electronic and printed newsletters, and email campaigns. The survey was conducted between September 18 and November 16, 2009. The sample size was 1,337. There were no age stipulations enforced to participate however only 1.4% of respondents were under the age of 25. There was no gender stipulation however only 3% of respondents were male. Based on the female survey respondent sample size, extrapolated to the US female



population, there is a 95% confidence level that the statistics are reliable within a sampling error of 2.86%.

STUDY SCOPE

The study included twenty-seven closed answer questions designed to explore the three essential themes:

Theme	Attitudes	Behaviors
General Housework	Perceptions of housework	Who cleans?
	Aspirations & priorities for a clean home	Use of green products
	Motivations for a clean home	
	Triggers for having help or DIY	
	Expectations for house cleaning outcomes	
	Evaluations of home cleanliness compared to others	
Work/Life Balance	Perceptions of individual work/life balance	Use of cleaning help to achieve work/life balance
	"2 nd shift" phenomenon	
	Ability of outside cleaning help to improve or maintain work/life balance	
Health, Infectious Disease & Germs	H1N1 – a local threat?	Vaccine history/intentions
	Concerns about cross-contamination	Frequency of cleanings
	Perceptions of home sanitary-level	Disinfection methods

STUDY FINDINGS

The findings and implications are categorized according to the three essential study themes.

GENERAL HOUSEWORK

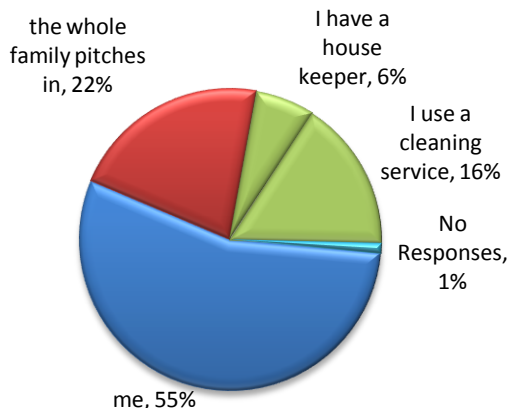
Who's Doing the Cleaning? Nearly one in four households (22.4%) uses outside cleaning help to maintain their homes. More than half of respondents clean their own homes and one in five had help from family members.



WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.

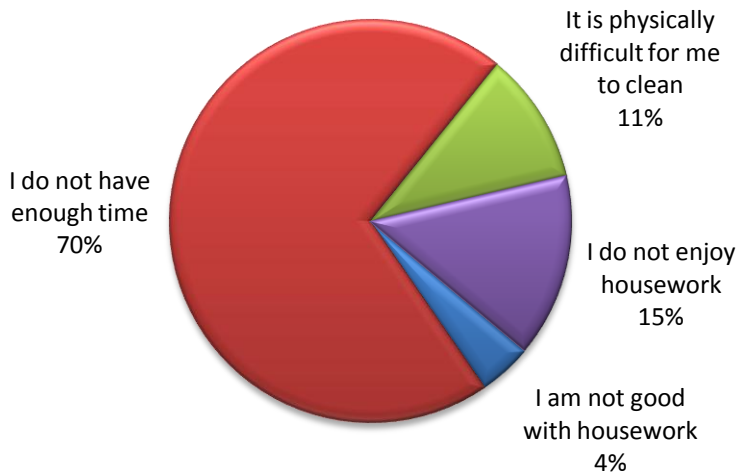
WHO DOES THE HOUSEWORK?



QUESTION 1: Who cleans your home?

Triggers for having help or doing it yourself: Women make daily choices based on the time/money continuum, paying for certain conveniences while foregoing others. Those respondents who use outside help to maintain their home's cleanliness do so to save time, while those who do their own cleaning do so to save money.

I HAVE CLEANING HELP BECAUSE....



Question 5: Which of these statements most accurately describes your situation?

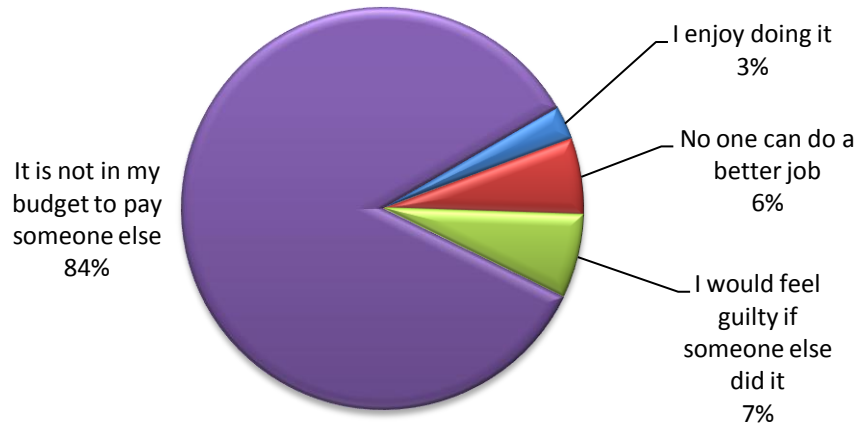


WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.

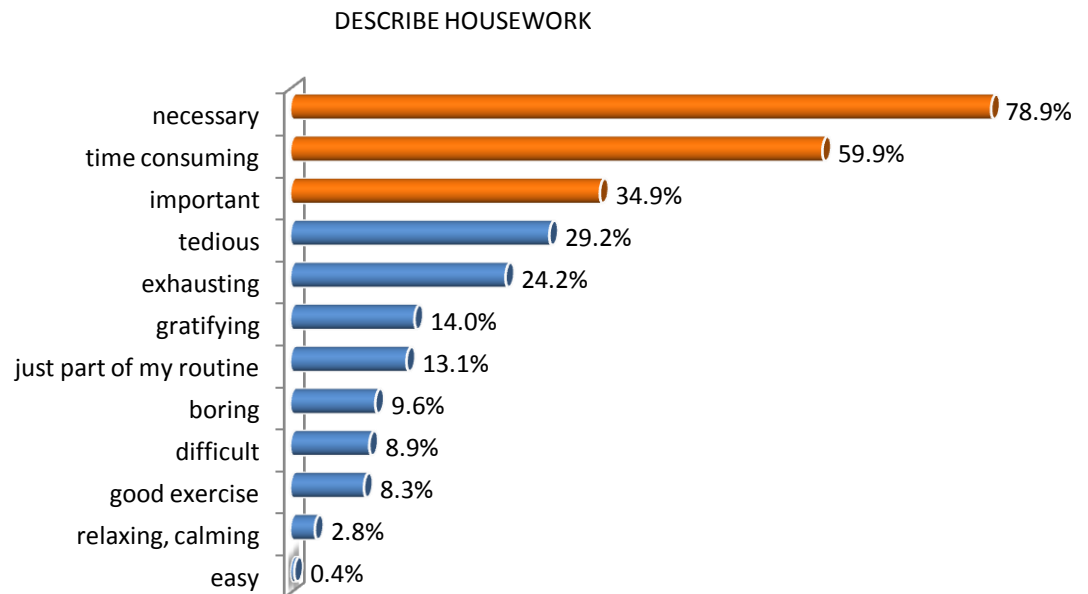


I DO NOT HAVE CLEANING HELP BECAUSE...



Question 5

Perceptions of housework: Respondents view housework as necessary, time consumer and important. Few positive descriptors were selected from this list:



Question 6: What three words/phrases best describe housework in your opinion? (Select 3)

Expectations for a clean home: A clean home is defined as the absence of dirt, grease and stains; the absence of clutter; and the absence of odors. The absence of germs and the absence of allergy and asthma triggers are not primary definitions of a clean home.

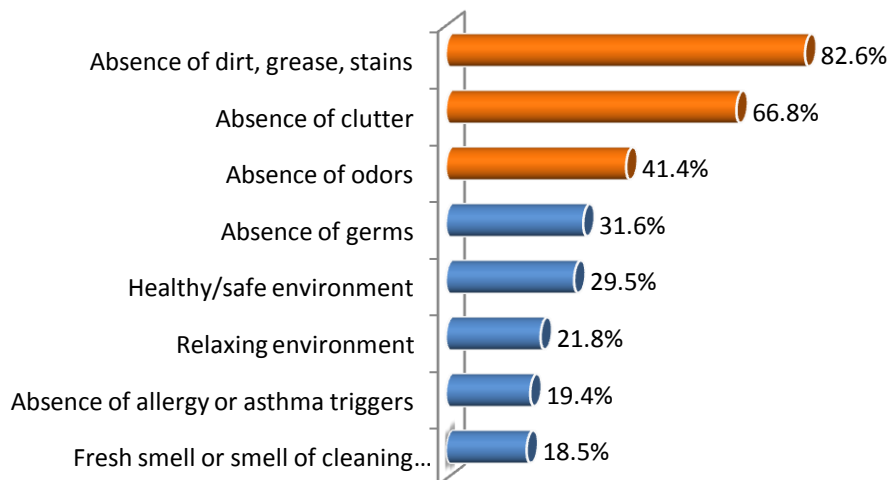


WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.



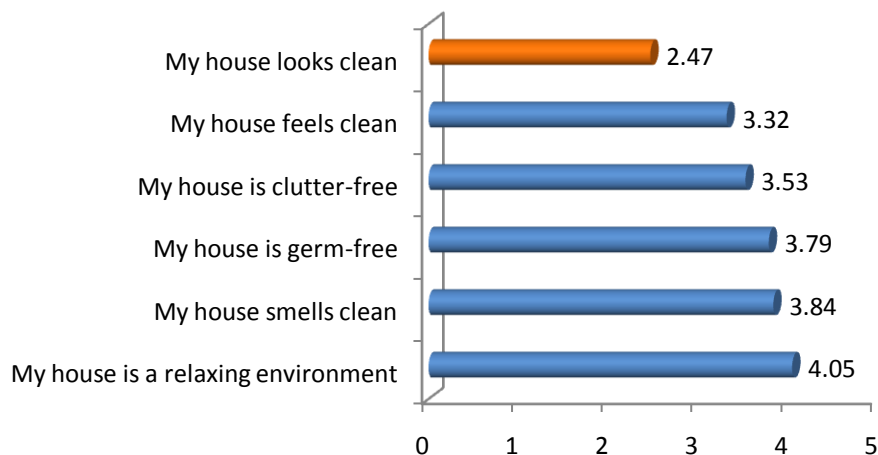
DEFINE A CLEAN HOME



Question 3: What three phrases best define a clean home in your opinion? (select 3 of the following)

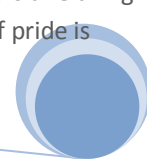
Aspirations and priorities for a clean home: Respondents did not have a strong consensus when ranking various priorities related to house cleaning. On a scale of 1 to 5 with 1 being most important, the highest ranking score was 2.47. The narrow delta between all rank scores suggests that aspirations and priorities for house cleaning results are individually based, and personal in nature.

RANKED IMPORTANCE (1 = MOST IMPORTANT)



Question 4: Rank these statements in order of importance to you (1 = most important).

Motivations for a clean home: The greatest motivator for house cleaning is a relaxing environment, followed by a healthy and safe environment. An element of pride is

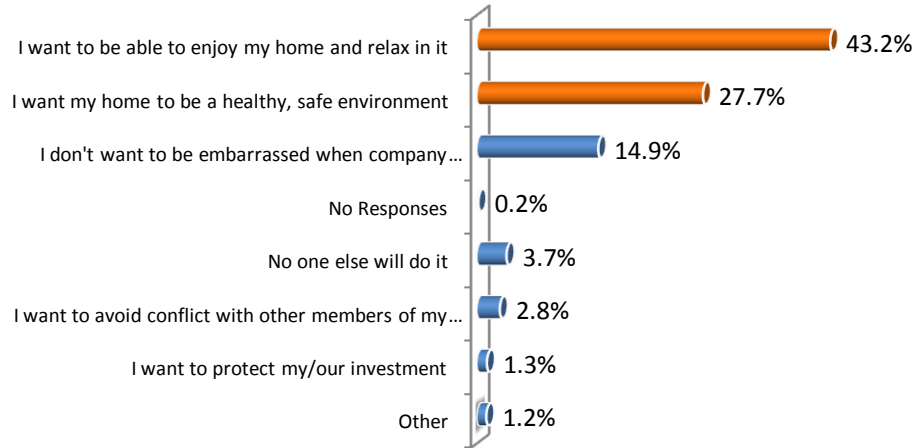


WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.

evidenced in the findings as the third notable motivator. The other options presented in this question appear to be non-factors for the study group.

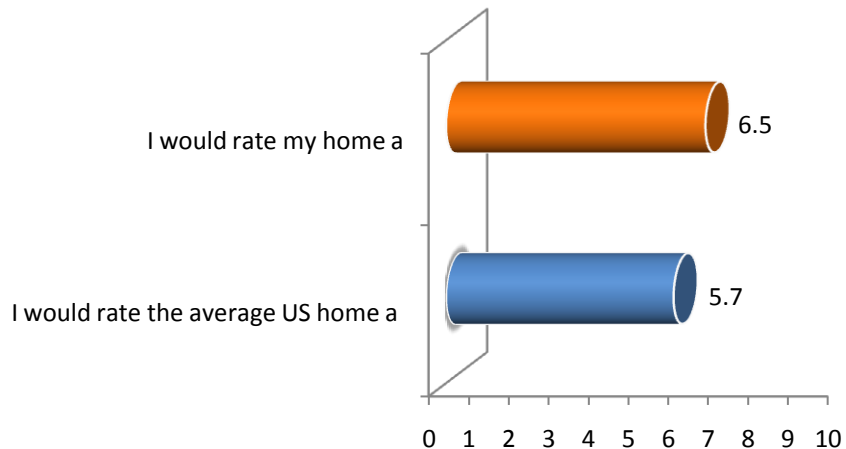
MOTIVATING FACTORS FOR HOUSE CLEANING



Question 9: What factor is the greatest motivator for you to clean or have your house cleaned?

Evaluations of home cleanliness: Respondents perceive their homes as cleaner than the average US home.

HOW DOES MY HOME COMPARE TO OTHERS?



Questions 7 & 8: On a scale of 1 – 10 with 10 being cleanest, I would rate my home a.../I would rate the average US home a...

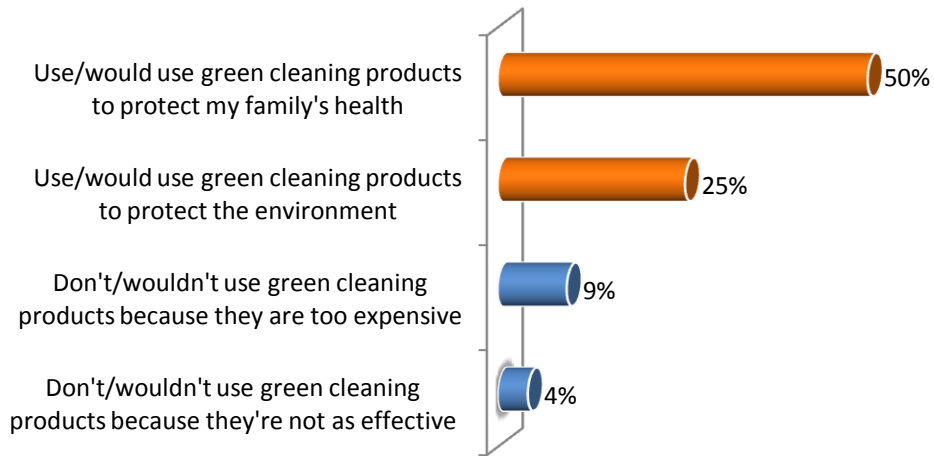
Green cleaning: With regard to green cleaning products, three out of four consumers use or would use them for health or environmental benefits. Twice as many respondents use or would use green cleaning products for health reasons as compared to environmental reasons.



WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.

I DO/DO NOT USE GREEN CLEANING PRODUCTS...

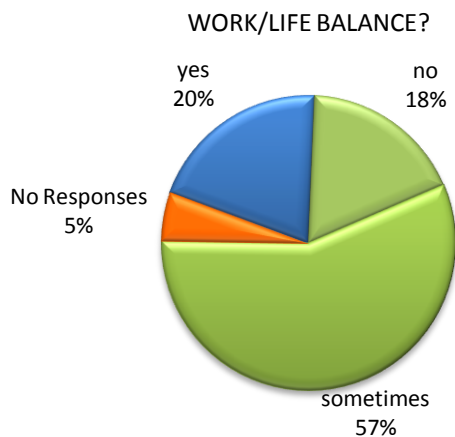


Question 15: Which of these statements most accurately describes your situation?

WORK/LIFE BALANCE

With a steadily growing population of dual-income homes, work/life balance and quality of life have become popular topics of conversation for busy moms in particular. Women tend to feel pressure to “do it all, well” and have difficulty preserving symmetry as a result.

Perceptions of balance: A full 75% of respondents indicated that they are not able to maintain work/life balance.



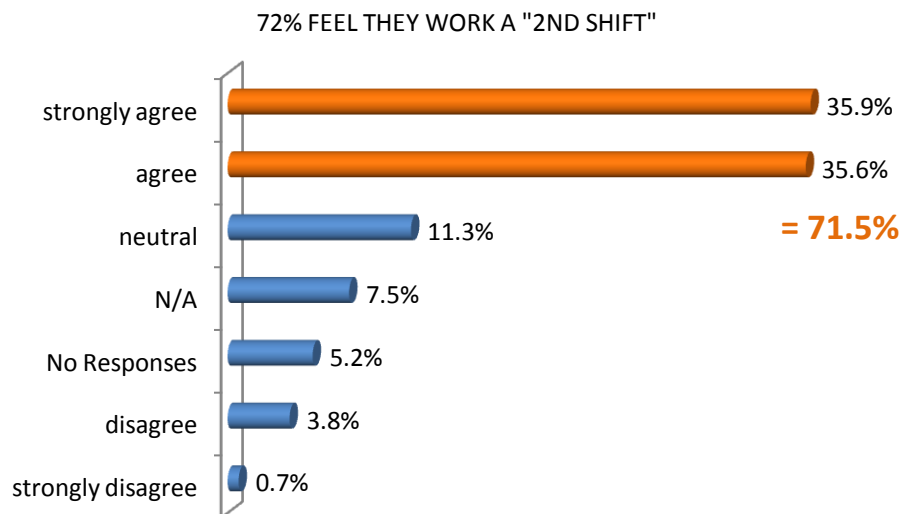
Question 11: Do you feel that you manage the details of your life well and are able to maintain a proper work/life balance?

2nd Shift: The “second shift” phenomenon – spending a number of hours cleaning and keeping house after spending time in the paid workforce – is a growing trend among women today. Respondents validate this perception; 72% agree or strongly agree that they work a second shift:



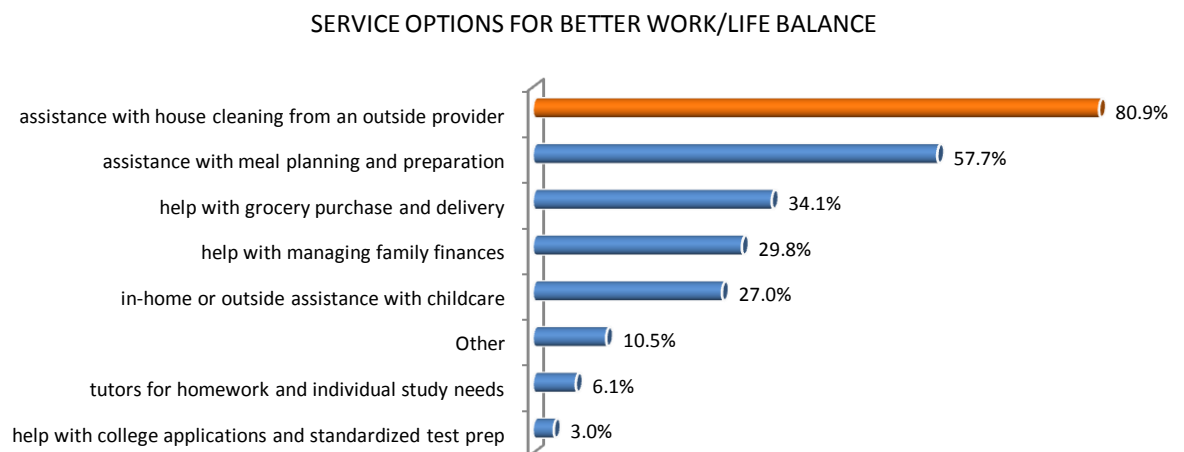
WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.



Question 10: To what extent do you feel you work a "second shift" at home, spending a number of hours cleaning and keeping house, after spending time in the paid workforce?

Ability of outside cleaning help to maintain/improve balance: When given several options for outside services which might help maintain balance or help achieve better balance, respondents overwhelmingly selected outside cleaning help.



Question 12: Please select the top three options which currently help you maintain balance OR would help you achieve better balance?

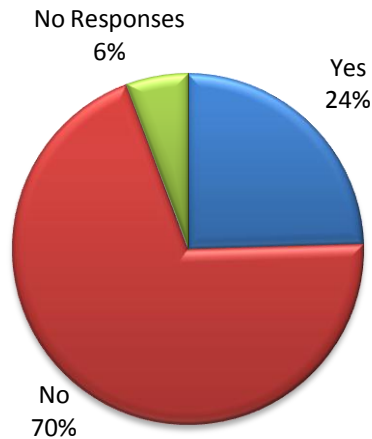
Respondents were questioned directly about use of an outside cleaning service. This time, 24.4% responded in the affirmative (compared to 22.4% for Question 1).



WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.

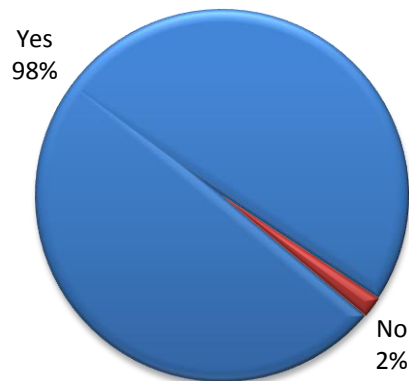
USING AN OUTSIDE CLEANING SERVICE



Question 13: Do you use an outside cleaning service?

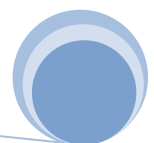
For those respondents who use an outside cleaning service, 98% indicated that doing so gave them better balance.

MY OUTSIDE CLEANING SERVICE GIVES ME BETTER WORK/LIFE BALANCE



Question 14a: (For those who answered "yes" to Question 13, "Do you use an outside cleaning service?") Do you feel that an outside cleaning service gives you better balance?

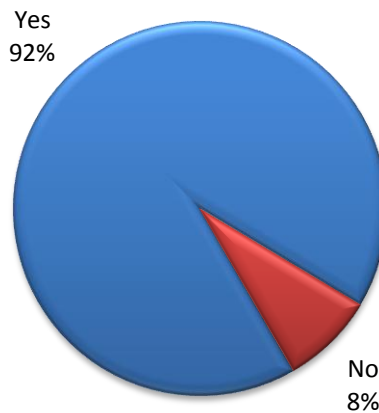
Of those respondents who do not use an outside cleaning service, 92% indicated that doing so would give them better balance.



WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.

AN OUTSIDE CLEANING SERVICE WOULD GIVE ME BETTER WORK/LIFE BALANCE



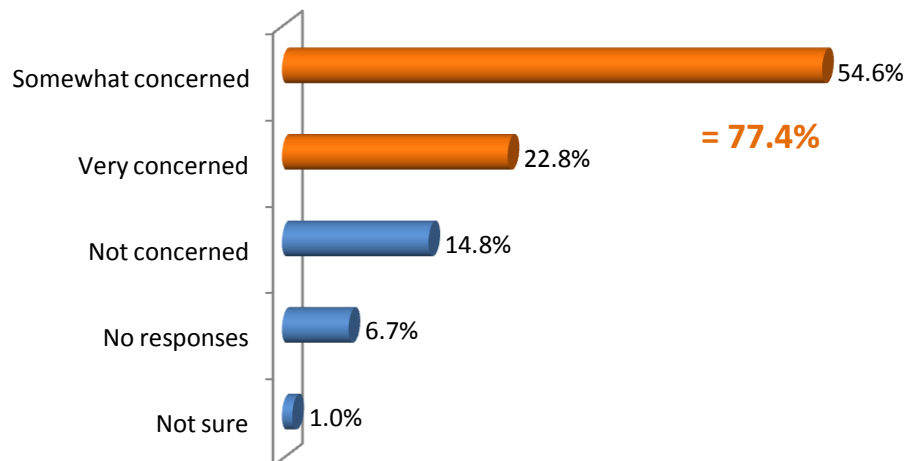
Question 14b: (For those who answered "no" to Question 13, "Do you use an outside cleaning service?") Do you feel that an outside cleaning service would give you better balance?

HEALTH, INFECTIOUS DISEASE & GERMS

The survey period fell during the early weeks of the 2009-2010 flu season, which begins at week 40 (the first full week of October) each year. New diagnoses of H1N1 spiked earlier in the season than normal and higher than expected, according to the CDC. Virtually all influenza cases tested have been diagnosed as H1N1.

H1N1 – a local threat? H1N1 demonstrates a major potential health risk of globalization and presents an ever-increasing role for personal and home sanitization for prevention and wellness. 77.4% of respondents are somewhat or very concerned about an H1N1 outbreak in their community.

CONCERN ABOUT H1N1



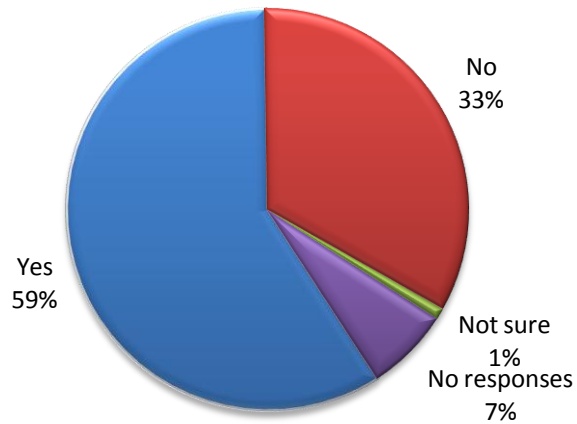
WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.

Question 20: How concerned are you about the H1N1 virus (swine flu), MRSA and other infectious diseases affecting your community?

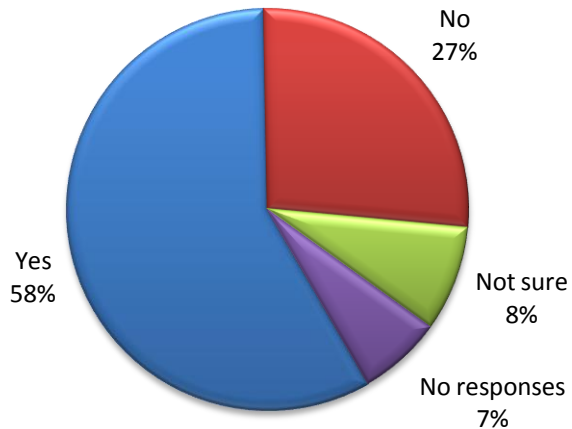
Although the H1N1 vaccine has been met with much controversy, respondents are in favor of vaccination.

HAD FLU SHOT IN LAST 12 MONTHS



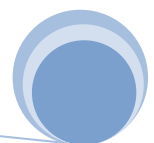
Question 18: Has any member of your household had a flu vaccination in the last 12 months?

PLAN TO GET A FLU SHOT IN NEXT 6 MONTHS



Question 19: Does any member of your household plan to have a flu vaccination in the next 6 months?

Frequency of cleaning: Nearly 80% of US households are cleaned every two weeks or more frequently.

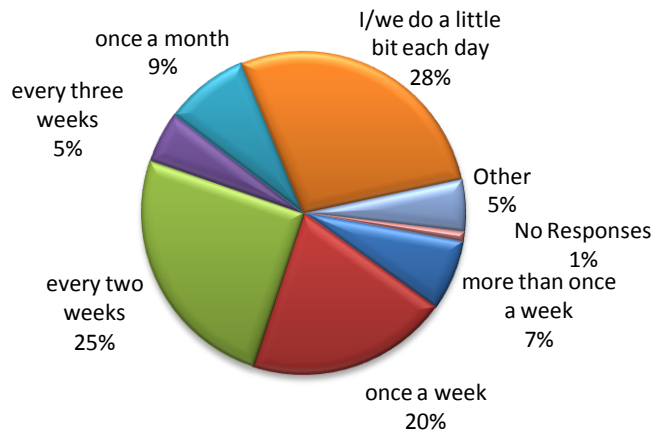


WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.



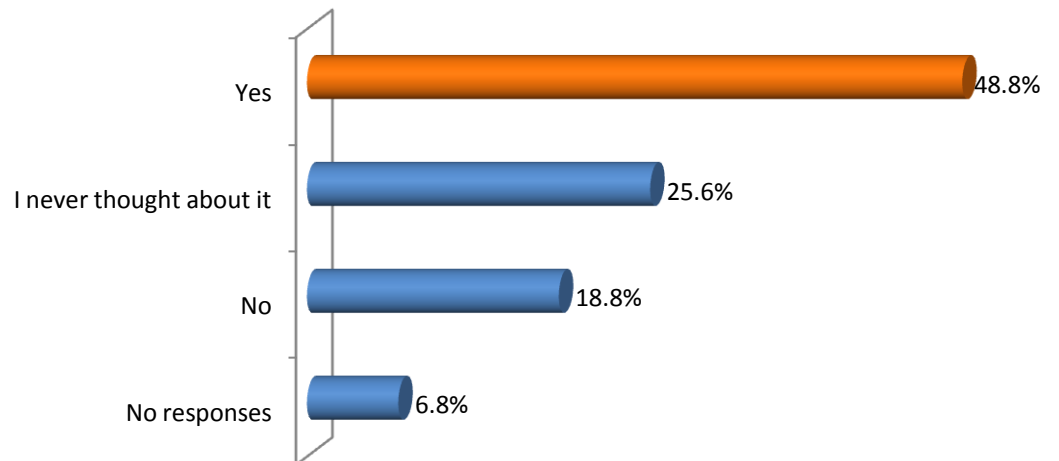
FREQUENCY OF HOUSE CLEANINGS



Question 2: How often is your home cleaned?

Perceptions of home sanitization levels: Approximately two thirds of respondents seem aware of the potential for cross-contamination, when germs from one area of the home are spread to another on cleaning cloths or other equipment. However a little less than half are concerned about this possibility in the home.

WORRY ABOUT CROSS-CONTAMINATION WHILE CLEANING



Question 16: Do you worry about transporting bacteria from one room or surface to the next when cleaning?

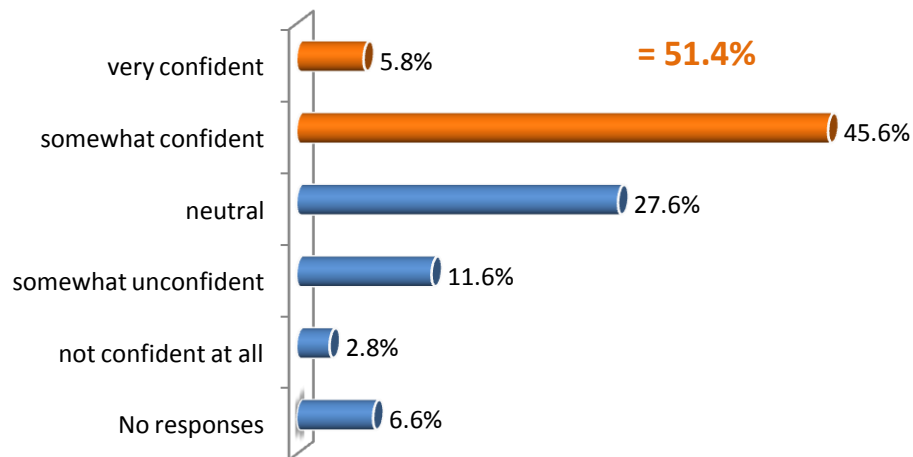
51.4% of respondents are somewhat to very confident that their homes are sanitary. The converse is equally notable; a full 42% half lack confidence their home is sanitary.



WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.

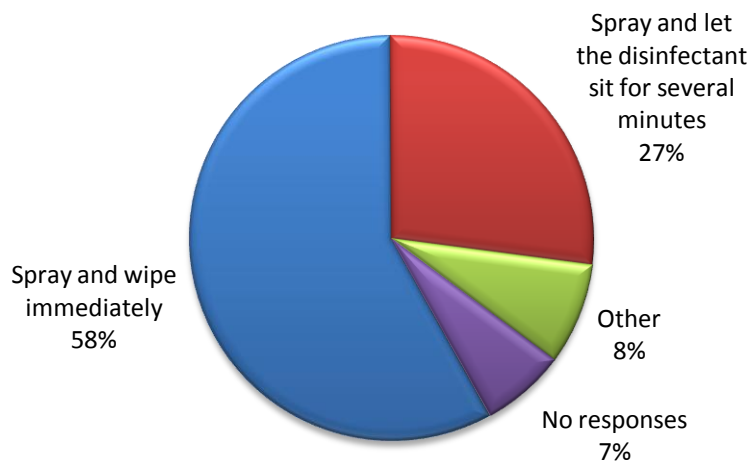
IS YOUR HOME SANITARY?



Question 17: How confident are you that your home is sanitary?

However the majority of respondents indicated that their method of disinfecting a surface or area in their home was to spray and immediately wipe the disinfectant solution away. Proper disinfection with cleaning solutions in fact requires a "dwell time" (saturating the surface and allowing the solution to sit for several to ten minutes).

FOLLOW CORRECT PROCEDURES FOR DISINFECTING



Question 21: When disinfecting a surface or area in my home I usually...



DEMOGRAPHICS OF RESPONDENTS

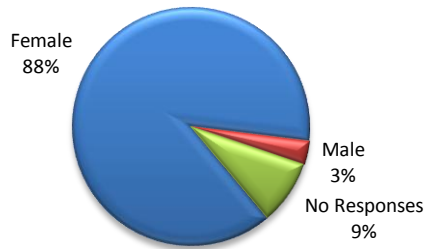
The respondent demographic make-up is very consistent with the profile of the typical consumer of house cleaning services.



WORK/LIFE BALANCE .

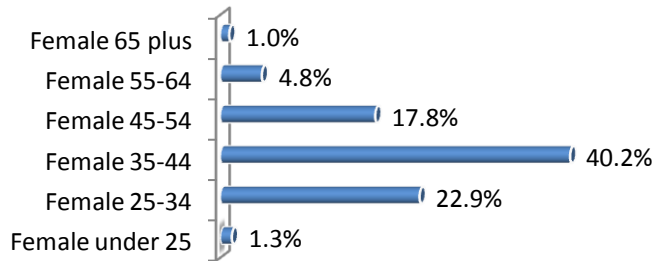
Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.

GENDER BREAKDOWN



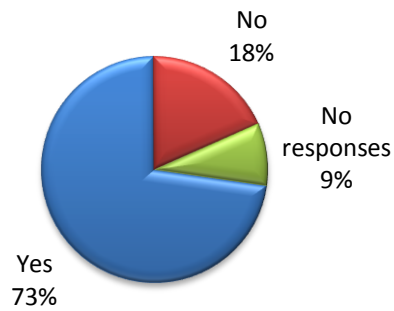
Question 22: In which of these groups do you fall (survey combines gender and age into one question)?

FEMALE AGE BREAKDOWN



Question 22.

PRESENCE OF CHILDREN AT HOME



Question 23: Do you have children living in your home?

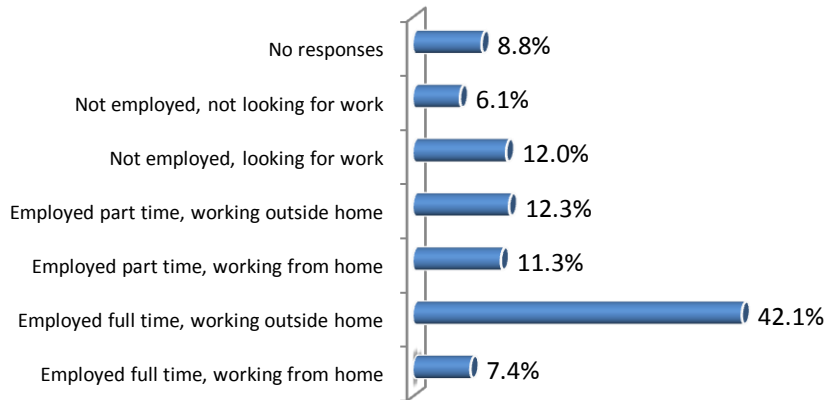


WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.

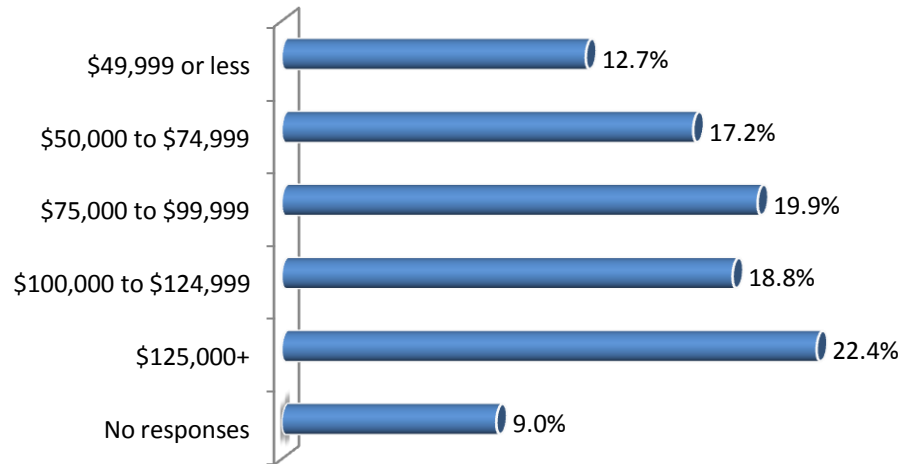


EMPLOYMENT STATUS



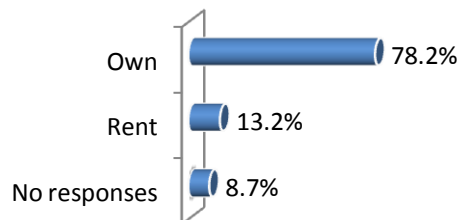
Question 24: What is your employment status?

ANNUAL HOUSEHOLD INCOME



Question 25: In which of the following brackets does your household income fall?

HOME OWNERSHIP

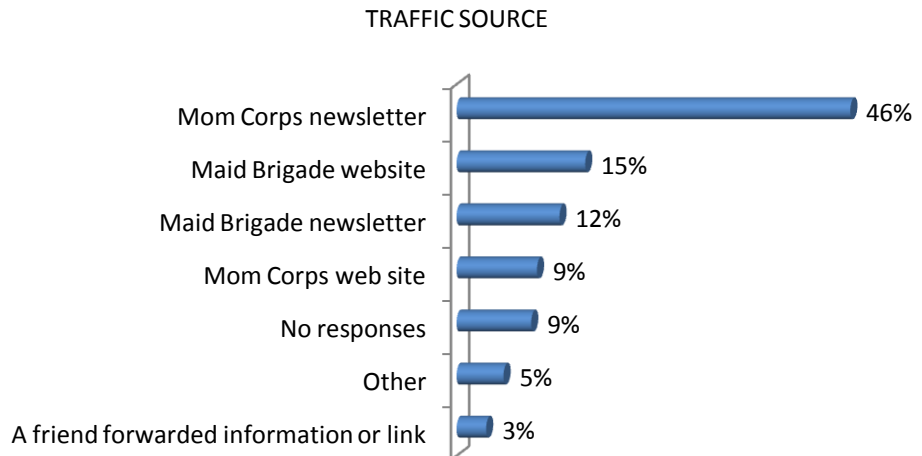


Question 26: Do you own or rent your home?



WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.



Question 27: How did you hear about this survey?

CONCLUSIONS & IMPLICATIONS

WORK/LIFE BALANCE: Cleaning help is a necessity for those that use it.

One in four respondents uses outside cleaning help, but that segment exhibits high tendencies for repeat use/loyalty due to the chronic time-bind the respondent demographic experiences. Consider these data points:

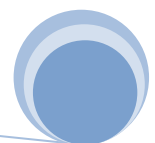
- ...Respondents' top descriptor for housework is 'necessary' and 'time-consuming' is the number two descriptor
- ...Over two thirds of cleaning help users cite lack of time as the reason and a mere 15% hire help because they don't enjoy housework
- ...Outside cleaning help tops the list of service options that afford better work/life balance
- ...Virtually all (98%) of cleaning help users say that it gives them better work/life balance

HOUSEWORK: Motivators and Aspirations

'I want to be able to enjoy my home and relax in it' is the biggest motivator, by a wide margin, for house cleaning. 'My house looks clean' is the highest ranked aspiration or priority for home cleanliness.

If enjoyment and relaxation are the biggest drivers to clean, and appearance is the number one goal of cleaning, then a clean appearance creates enjoyment and relaxation. These in turn influence work/life balance. Hence a clean appearance contributes to work/life balance.

Respondents closely clustered their aspirational rankings for 'feels clean', 'is clutter-free', 'is germ-free' and 'is relaxing' and this may influence the apparent paradox between aspirations of appearance and fears of infectious disease, especially considering respondents' low confidence levels on their homes' sanitary condition.



WORK/LIFE BALANCE .

Consumer attitudes and behaviors regarding housework, infectious disease and 'doing it all, well'.

INFECTIOUS DISEASE: H1N1 is perceived as a real threat.

Respondents believe the H1N1 virus could affect their own communities.

- ...Three in four respondents express concern of a local outbreak
- ...Nearly two thirds of respondents report that any member of their household had a flu shot in the last twelve months
- ...Nearly two thirds will have a flu shot in the next six months

These concerns may be affecting how respondents perceive their home's "hygiene" levels.

- ...Roughly half worry about cross-contamination of germs while cleaning
- ...Roughly half lack confidence that their home is sanitary
- ...Respondents only scored themselves a 6.5 on a 10-point scale for home cleanliness

However there appears to be a lack of connection between these infectious disease concerns and respondents' definitions of a clean home *and* expectations or priorities of a clean home.

- ...'Absence of germs' ranks in the middle of the pack (fourth among eight terms) as the best definition of a clean home
- ...Respondents assign medium priority (fourth among six) to a germ-free home as the most important aspiration for their home

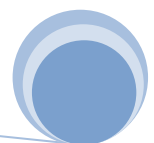
The data suggests consumers may not view the home as an exposure point for sickness – a disconnect between 'local' and 'immediate' environments as the sphere of risk. Alternatively, consumers may simply *assume* that disinfection is included in the outcome of a normal cleaning regimen, given the fact that they don't understand proper disinfection procedures, which may negatively bias the priority placed on germ control in survey responses.

More research on this specific point would be illuminating.

LACK OF KNOWLEDGE: Education is necessary.

Respondents care about infectious disease but lack the knowledge to properly safeguard their homes against germs.

- ...Fewer than 1 in 3 appear to understand proper disinfection methods



APPENDIX – SURVEY QUESTIONS

Question 1: Who cleans your home?

Question 2: How often is your home cleaned?

Question 3: What three phrases best define a clean home in your opinion? (select 3 of the following)

Question 4: Rank these statements in order of importance to you (1 = most important).

Question 5: Which of these statements most accurately describes your situation? (topic is reason for having/not having outside cleaning help)

Question 6: What three words/phrases best describe housework in your opinion? (Select 3)

Questions 7: On a scale of 1 – 10 with 10 being cleanest, I would rate my home a....

Questions 8: On a scale of 1 – 10 with 10 being cleanest, I would rate the average US home a....

Question 9: What factor is the greatest motivator for you to clean or have your house cleaned?

Question 10: To what extent do you feel you work a "second shift" at home, spending a number of hours cleaning and keeping house, after spending time in the paid workforce?

Question 11: Do you feel that you manage the details of your life well and are able to maintain a proper work/life balance?

Question 12: Please select the top three options below which currently help you maintain balance OR would help you achieve better balance?

Question 13: Do you use an outside cleaning service?

Question 14a: (For those who answered "yes" to Question 13, "Do you use an outside cleaning service?") Do you feel that an outside cleaning service gives you better balance?

Question 14b: (For those who answered "no" to Question 13, "Do you use an outside cleaning service?") Do you feel that an outside cleaning service would give you better balance?

Question 5: Which of these statements most accurately describes your situation? (topic is green cleaning)

Question 16: Do you worry about transporting bacteria from one room or surface to the next when cleaning?

Question 17: How confident are you that your home is sanitary?

Question 18: Has any member of your household had a flu vaccination in the last 12 months?

Question 19: Does any member of your household plan to have a flu vaccination in the next 6 months?

Question 20: How concerned are you about the H1N1 virus (swine flu), MRSA and other infectious diseases affecting your community?

Question 21: When disinfecting a surface or area in my home I usually...

Question 22: In which of these groups do you fall? (gender and age)

Question 23: Do you have children living in your home?

Question 24: What is your employment status?

Question 25: In which of the following brackets does your household income fall?

Question 26: Do you own or rent your home?

Question 27: How did you hear about this survey?

