# Section A: Preamble & Introduction

**Project: Laundry**

**Segment: Hospitality (Hotels & Restaurants) and Launderettes**

**Target respondent: Who is responsible and decision maker for purchasing laundry products for the organization.**

***NOTE:***

* *Final decision on whether or not we will go ahead with the respondent for the main survey will be taken by the research team basis the RQ.*

# Section A: Introduction, Recruitment & Classification

## **Section A.1: Introduction**

*“Good \_\_\_\_\_\_\_\_\_\_! I am \_\_\_\_\_\_\_\_\_\_\_ from B2B & Industrial team of Kantar, we are doing a study for one of our clients who is into cleaning and laundry products for B2B or institutional segment like Hotels, Hospitals, Restaurants, commercial Launderettes etc. The objective of this study is to understand the current usage practices of laundry products, typical purchase & buying behaviors, challenges, and pain points with respect to the current laundry products etc. Later towards the end we will introducing few laundry product concepts which are being developed by our client and seek your views & opinion on the same and understand your intent to purchase if the is product is made available in the market. Please note that we are just interested in your experience and opinions, there are no ‘right’ answers, and we don’t expect you to have all the answers.*

*Being one of the key institutional/B2B customer, your views are important to our study. As part of our discussion, we are just looking to gain a clear view on what can be that winning laundry product portfolio for the institutional customers like you.*

*Would you like to participate in the study? This discussion would require around 75-90 minutes of your valuable time.”*

*Before starting this interview, I wish to confirm that this interview complies with the Market Research Society of India (MRSI) and international codes of ethics for market research. Please be assured that all information given by you will be kept strictly confidential and not revealed to anyone. The response collected will be aggregated together with the responses of others before compilation and analysis. Under no circumstance will this information be used for sales for any commercial purpose.”*

Do you have any queries before I start the interview? For further clarification, you may also contact my senior at Kantar any point during this interview.

## **Section A.2: Recruitment & Classification**

*“First of all, we would like to thank you for your valuable time. To begin with, we would like to ascertain that we speak to the right profile of the respondents. Therefore, we request of you to answer the below questions.*

1. Please let us know what best describes the business that you are part of?

|  |  |  |  |
| --- | --- | --- | --- |
| **Business Type** | **Code** | **Instruction** |  |
| A Hotel | 1 | Continue | ASK Q2 |
| A Restaurant | 2 | Continue | ASK Q3 |
| A launderette (A business where services such as machine washing and machine drying of clothes are provided) | 3 | Continue | ASK Q4 |
| None of these | 4 | Terminate |  |

**[ Line of questioning for hotel business]**

1. Please tell us the below details about the hotel that you are a part of?
   1. What is the name of the hotel that you are part of?
   2. What is the classification/star rating of hotel that you are part of?

|  |  |  |
| --- | --- | --- |
| **Hotel Classification** | **Code** | **Instructions** |
| Less than 2 Star | 1 | Terminate |
| 2 Star | 2 | Continue |
| 3 Star | 3 | Continue |
| Greater than 3 Star | 4 | Terminate |

* 1. What is the capacity of this hotel i.e. total number of rooms in this hotel?

(**Instructions –** Terminate if number of rooms are less than 15)

* 1. Is this hotel a part of any chain of hotels across India?

|  |  |
| --- | --- |
| **Size of Hotel** | **Code** |
| No, it is not part of any chain. It is a standalone hotel | 1 |
| Yes, it is part of a chain of hotels around India. There are other hotels across the country under same brand | 2 |

* 1. **[ IF the hotel is part of a chain of hotels]**

How many total numbers of hotels across the country are there under this chain?

|  |  |  |
| --- | --- | --- |
| **Size of Hotel** | **Code** | **Instructions** |
| Less than 5 hotels | 1 | Continue |
| Between 5 to 10 Hotels | 2 | Continue |
| More than 10 Hotels | 3 | Terminate |

* 1. **[ IF there are less than 10 hotels across the country under the chain]**

Who does the decision making with respect to purchasing of laundry products and associated brands?

|  |  |  |
| --- | --- | --- |
| **Decision making** | **Code** | **Instructions** |
| Brand and products of laundry to purchased are decided centrally for the chain of hotels. Our hotel does not have the freedom to decide on brands and products of laundry to purchased | 1 | Terminate |
| Despite of being a part of chain of hotels, our hotel has the freedom to decide on brands and products of laundry to be purchased | 2 | Continue |

* 1. **How is laundry for bedsheets, curtains and other guests’ clothes managed within this hotel?**

|  |  |  |
| --- | --- | --- |
| **Decision making** | **Code** | **Instructions** |
| All the laundry for bedsheets, curtains and other guests’ clothes are usually outsourced to a launderette or a Washerman (Dhobi) | 1 | Terminate |
| All the laundry for bedsheets, curtains and other guests’ clothes are washed and managed by inhouse staff | 2 | Continue |

Now, please tell us the following details about yourself.

* 1. Can you please tell us which of this best describes your role in terms of deciding on brands and products of laundry to be purchased?

|  |  |  |
| --- | --- | --- |
| **STATEMENT** | **CODE** | **INSTRUCTIONS** |
| I am the final decision maker for the brand selection and purchase of laundry products for the hotel | 1 | CONTINUE |
| I am one of the key decision makers for the brand selection and purchase of laundry products for the hotel | 2 | CONTINUE |
| I am not a decision maker for the brand selection and purchase of laundry products for the hotel | 3 | TERMINATE |
| None of the above | 5 | TERMINATE |

* 1. Could you please tell us about your designation in this organization?

|  |  |
| --- | --- |
| **Current designation** | **Code** |
| Head of Housekeeping | 1 |
| Head of Laundry | 2 |
| Head of cleaning staff | 3 |
| Purchase Manager | 4 |
| Any other, please specify. | 99 |

* 1. Could you please tell me what is your overall experience of working within this role?

|  |  |  |
| --- | --- | --- |
| **Overall Experience** | **Code** | **Continue** |
| Less than 1 years | 1 | Terminate |
| 1-4 years | 2 | Continue |
| 4-7 years | 3 | Continue |
| More than 7 years | 4 | Continue |

**[ Line of questioning for restaurant business]**

1. Please tell us the below details about the hotel that you are a part of ?
   1. What is the name of the restaurant that you are part of?
   2. What is the type of the restaurant that you work for?

|  |  |  |
| --- | --- | --- |
| **Restaurant Classification** | **Code** | **Instructions** |
| A Quick Service Restaurant that is part of a chain having outlets in more than 10 cities | 1 | Terminate |
| A QSR restaurant that is part of a chain having outlets in between 1 -10 cities | 2 | Continue |
| A QSR restaurant that is not part of any chain and has a standalone outlet | 3 | Terminate |
| A Fine Dine/Casual Dine Restaurant of a 5 Star Hotel | 4 | Terminate |
| A fine dine / casual dine restaurant that is part of a chain and has a cost of two people more than INR 1000 excluding alcohol | 5 | Terminate |
| Independent/ Local fine dine or casual restaurant; not part of any chain with cost of two people between 501 -1000 excluding alcohol | 6 | Continue |
| Independent/ Local fine dine or casual restaurant; not part of any chain with cost of two people less than 500 excluding alcohol | 7 | Terminate |
| Any Other (Please Specify) | 99 |  |

* 1. How many tables of does your restaurants have?

(**Instructions** – If less than 15 tables in the restaurant, please terminate)

* 1. For what all purposes laundry powder is used at your restaurant?

|  |  |  |
| --- | --- | --- |
| **Amenities** | **Code** | **Instructions** |
| For managing inhouse laundry requirements such as cleaning of table clothes etc. | 1 | Continue |
| Laundry powder is used for cleaning utensils/dishes for higher degreasing effect | 2 | Continue |
| We do not use laundry powder at all at this restaurant. | 3 | Terminate |
| Probe on Any Other | 99 |  |

* 1. **[ IF laundry powder is used in any way and the restaurant is part of a chain]**

Who does the decision making with respect to purchasing of laundry products and associated brands?

|  |  |  |
| --- | --- | --- |
| **Decision making** | **Code** | **Instructions** |
| Brand and products of laundry to be purchased are decided centrally for the chain of restaurants. Our restaurant does not have the freedom to decide on brands and products of laundry to be purchased | 1 | Terminate |
| Despite of being a part of chain of restaurants, our restaurant has the freedom to decide on brands and products of laundry to be purchased | 2 | Continue |

* 1. Do you use multi – purpose cleaning powder at this restaurant?

Multi- purpose cleaning powder are meant to remove dirt, stains and grease from various kinds of surfaces. They can be used for different cleaning tasks as per requirement such as for cleaning floors, dishes, surfaces etc.

|  |  |
| --- | --- |
| **Statement** | **Code** |
| Yes, we use multi-purpose powder | 1 |
| No, we do not use multi-purpose powder | 2 |

* 1. Knowing that a one solution such as multi-purpose powder can effectively cater to different needs such as cleaning floors, dishes, and other surfaces, how open you are to try and use it?

|  |  |  |
| --- | --- | --- |
| **STATEMENT** | **CODE** | **Instructions** |
| Will definitely use | 1 | Continue |
| May or may not use | 2 | Continue |
| Will not use | 3 | Terminate |

Now, please tell us the following details about yourself.

* 1. Can you please tell us which of this best describes your role in terms of deciding on brands and products of laundry to be purchased?

|  |  |  |
| --- | --- | --- |
| **STATEMENT** | **CODE** | **Instructions** |
| I am the final decision maker for the brand selection and purchase of laundry products for the hotel | 1 | Continue |
| I am one of the key decision maker for the brand selection and purchase of laundry products for the hotel | 2 | Continue |
| I am not a decision maker for the brand selection and purchase of laundry products for the hotel | 3 | Terminate |
| None of the above | 5 | Terminate |

* 1. Could you please tell us about your designation in this organization?

|  |  |
| --- | --- |
| **Current designation** | **Code** |
| Owner | 1 |
| Purchase Manager | 2 |
| Restaurant Manager | 3 |
| Head of Cleaning staff | 4 |
| Any other, please specify. | 99 |

* 1. Could you please tell me what is your overall experience of working within this role?

|  |  |  |
| --- | --- | --- |
| **Overall Experience** | **Code** | **Instructions** |
| Less than 1 year | 1 | Terminate |
| 1-4 years | 2 | Continue |
| 4-7 years | 3 | Continue |
| More than 7 years | 4 | Continue |

1. **[Line of questioning for a launderette]**

Please tell us the below details about the laundry business that you are a part of?

* 1. What is the name of the laundry business that you are part of?
  2. What all services you provide as part of this laundry business?

|  |  |  |
| --- | --- | --- |
| **Services** | **Code** | **Instructions** |
| Washing and Ironing of Clothes | 1 | Continue |
| Washing, Ironing and Packing (Folding) of clothes | 2 | Continue |
| Washing and Packing (Folding) of clothes. No Ironing of Clothes | 3 | Continue |
| Dry Cleaning | 4 | Terminate |
| Probe on anything else | 5 |  |

* 1. Who are your primary customers for washing of laundry?

|  |  |  |
| --- | --- | --- |
| **Primary customer** | **Code** | **Instructions** |
| B2C customers | 1 | Continue |
| Small and Medium businesses such as health care clinics, restaurants, hotels (2 star/3 star) etc. | 2 | Continue |
| Large businesses such as big hospitals, hotels (4 Star/5 Star), airlines etc. | 3 | Terminate |
| Other large chains of laundry operators | 4 | Terminate |
| Probe on anything else | 99 |  |

* 1. How many washing machines are installed at your facility?
  2. What is the average capacity (in Kg) of each machine that is installed at your facility?

**(Instructions** – Terminate if machine capacity is more than 15kg)

* 1. On an average, what how much quantity of clothes are washed at your facility in a single day?

**(Instructions** – Terminate if avg. washing quantity per day is more than 500kg/day)

* 1. Is this laundry business a part of any chain of laundry service provider across India?

|  |  |
| --- | --- |
| **Size of Hotel** | **Code** |
| No, it is not part of any chain. It is a standalone business | 1 |
| Yes, it is part of a chain of laundry service provider around India. There are other laundry facilities across the country under same brand | 2 |

* 1. **[ IF the laundry business is part of a chain of laundry service provider]**

How many total numbers of laundry outlets/stores across the country are there under this chain?

|  |  |  |
| --- | --- | --- |
| **Size of Hotel** | **Code** | **Instructions** |
| Less than 5 stores/outlets | 1 | Continue |
| Between 5 to 10 stores/outlets | 2 | Continue |
| More than 10 stores/outlets | 3 | Terminate |

* 1. **[ IF there are less than 10 stores/outlets across the country under the chain]**

Who does the decision making with respect to purchasing of laundry products and associated brands?

|  |  |  |
| --- | --- | --- |
| **Decision making** | **Code** | **Instructions** |
| Brand and products of laundry to purchased are decided centrally across the chain of laundry service provider. Our facility does not have the freedom to decide on brands and products of laundry to purchased | 1 | Terminate |
| Despite of being a part of chain of laundry service provider, our facility has the freedom to decide on brands and products of laundry to be purchased | 2 | Continue |

Now, please tell us the following details about yourself.

* 1. Can you please tell us which of this best describes your role in terms of deciding on brands and products of laundry to be purchased?

|  |  |  |
| --- | --- | --- |
| **STATEMENT** | **CODE** | **Instructions** |
| I am the final decision maker for the brand selection and purchase of laundry products for the hotel | 1 | Continue |
| I am one of the key decision makers for the brand selection and purchase of laundry products for the hotel | 2 | Continue |
| I am not a decision maker for the brand selection and purchase of laundry products for the hotel | 3 | Terminate |
| None of the above | 5 | Terminate |

* 1. Could you please tell us about your designation in this facility?

|  |  |
| --- | --- |
| **Current designation** | **Code** |
| Owner | 1 |
| Facility Manager | 2 |
| Head of laundry operation | 3 |
| Any other, please specify. | 99 |

* 1. Could you please tell me what is your overall experience of working within this role?

|  |  |  |
| --- | --- | --- |
| **Overall Experience** | **Code** | **Instructions** |
| Less than 1 year | 1 | Terminate |
| 1-4 years | 2 | Continue |
| 4-7 years | 3 | Continue |
| More than 7 years | 4 | Continue |

* 1. Please, let us know as part of your current role, which all process and steps followed during the wash cycle you closely understand?

*Probe whether the respondent understands the below steps and processes. Please tell the respondent that at this stage a simple yes or no would work as we would be discussing these in detail during the main interview.*

(NOTE – the Research can accept of drop the respondents based on the responses received for this particular question)

* + - Number of wash cycles per day & Number of machines in the laundry
    - Average load (in kg) per wash cycle
    - Average time per wash cycle
    - On what basis sorting of clothes are done?
    - Time taken to prepare laundry for washing and time taken for actual washing process.
    - Type of water (hot/warm) used for preparing laundry and used for actual washing.
    - Chemicals or laundry products used during the wash process.
    - Quantity of chemicals used for wash process.
  1. Please let us know what all brands of laundry products that are used at your facility?
  2. Do you have any kind of contract with the brands like Diversey or Ecolab for usage of laundry products at your facility?

**(Terminate** – exclude if in contract with Diversey/Ecolab and/or wash for big operators/big chains/airlines)

* 1. Please tell us the laundry products that you use at this facility from the below.
     + - Powder Detergent
       - Liquid Detergent
       - Fabric Conditioner
       - Stain Remover
       - Bleach
       - Probe on any other whether they prepare their own solution for laundry.
         * (If they are mixing their own solution, we may Terminate the respondent)

