

# CCPC Linen Laundry Providers

An Amárach Briefing on behalf of:



CCPC

Coimisiún um  
Iomaíocht agus  
Cosaint Tomhaltóirí

Competition and  
Consumer Protection  
Commission

March 2019/SR/S19-036

- Interviews were carried out with those in charge of linen laundry procurement services in the hospitality and healthcare sector in Ireland.
- The original sample was 200, with 100 in hospitality and 100 in healthcare. However there was difficulty in reaching hospitals due to the limited amount of hospitals in the country. As a result of this the overall number of completed surveys to be achieved in healthcare was reduced to 60.
- Overall the final sample was 180.
  - 60 in healthcare
  - 122 in hospitality
- A pilot of 5 surveys was carried out which were included in the main survey. Minor changes were made to the survey but none of these changes affected the data in the initial survey.
- Interviews were completed through telephone in Amarach's in-house CATI centre.
- The fieldwork dates were the 15<sup>th</sup> of February to the 7<sup>th</sup> of March.
- The base sizes for service providers throughout are under 55 therefor should be interpreted with caution.

# Sample Breakdown

(Base: All respondents – 182)

Hotel 57%

Private nursing 18%

Public Hospital 9%

B&B 6%

Private hospital 4%

Restaurant 2%

Caterer 1%

Higher Education Institution 1%

Public nursing home 1%

**Healthcare 33%**

**Hospitality 66%**

	Region				Sector		Size				
	Dublin	ROI	Munster	Con/Ulster	Healthcare	Hospitality	<10	10-24	25-49	50-99	100
	<u>47</u>	<u>48</u>	<u>51</u>	<u>36</u>	<u>60</u>	<u>122</u>	<u>10</u>	<u>31</u>	<u>39</u>	<u>47</u>	<u>55</u>
Hotel	66%	44%	51%	69%	0	84%	0	58%	46%	53%	76%
Private nursing	9%	38%	16%	8%	55%	0	0	13%	36%	30%	2%
Public Hospital	11%	6%	14%	6%	28%	0	10%	10%	5%	9%	13%
B&B	2%	4%	14%	3%	0	9%	70%	6%	3%	2%	0
Private hospital	4%	4%	4%	3%	12%	0	0	3%	5%	0	7%
Restaurant	4%	0	2%	3%	0	3%	10%	0	5%	2%	0
Caterer	0	0	0	6%	0	2%	10%	3%	0	0	0
Higher Education Institution	2%	0	0	0	0	1%	0	0	0	0	2%
Public nursing home	2%	0	0	0	2%	0	0	0	0	2%	0
<b>Healthcare</b>	<b>26%</b>	<b>52%</b>	<b>33%</b>	<b>17%</b>	<b>100%</b>	<b>-</b>	<b>10%</b>	<b>29%</b>	<b>46%</b>	<b>43%</b>	<b>22%</b>
<b>Hospitality</b>	<b>74%</b>	<b>48%</b>	<b>67%</b>	<b>83%</b>	<b>-</b>	<b>100%</b>	<b>90%</b>	<b>71%</b>	<b>54%</b>	<b>57%</b>	<b>78%</b>

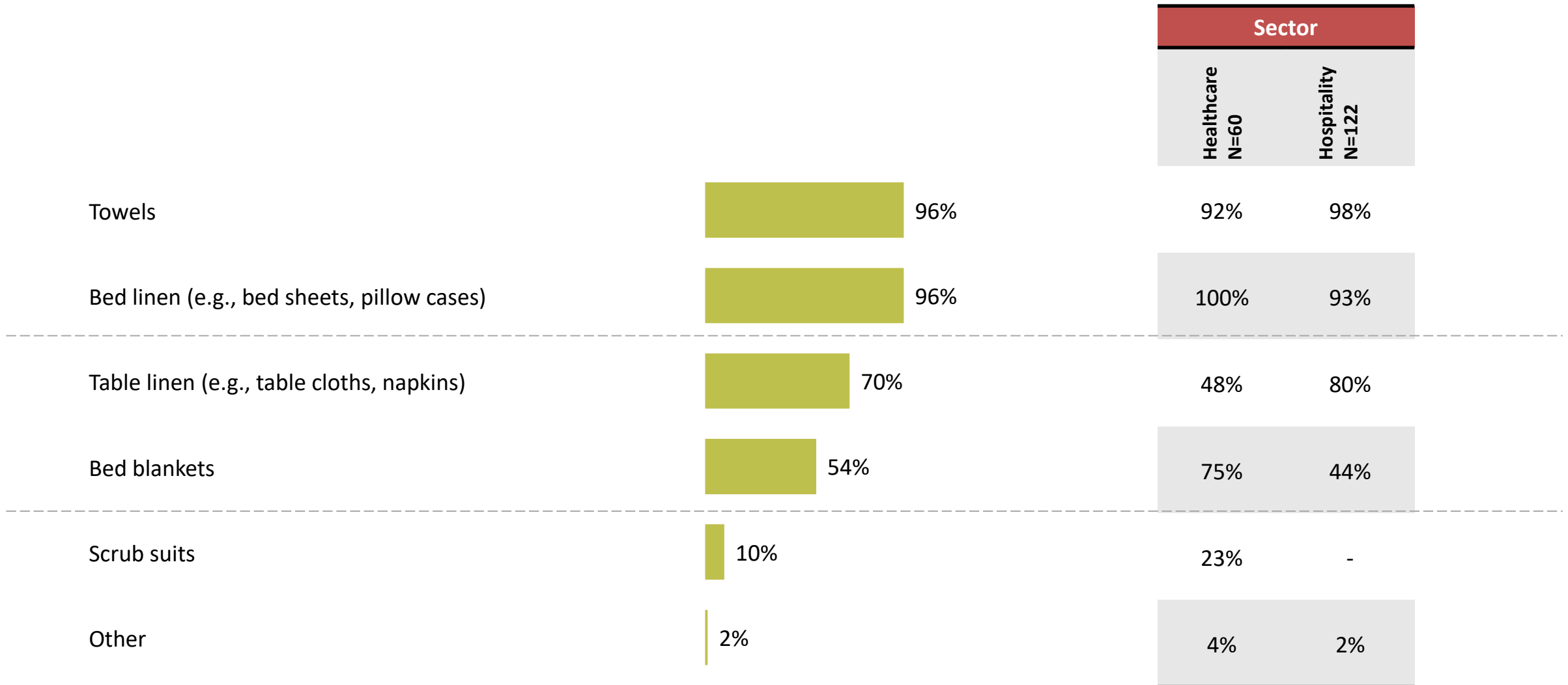
# The majority of the organisations that we interviewed had one site only in Ireland. This was similar across both sectors

(Base: All respondents: 182)



# Almost all organisations that we spoke to use towels and bed linen

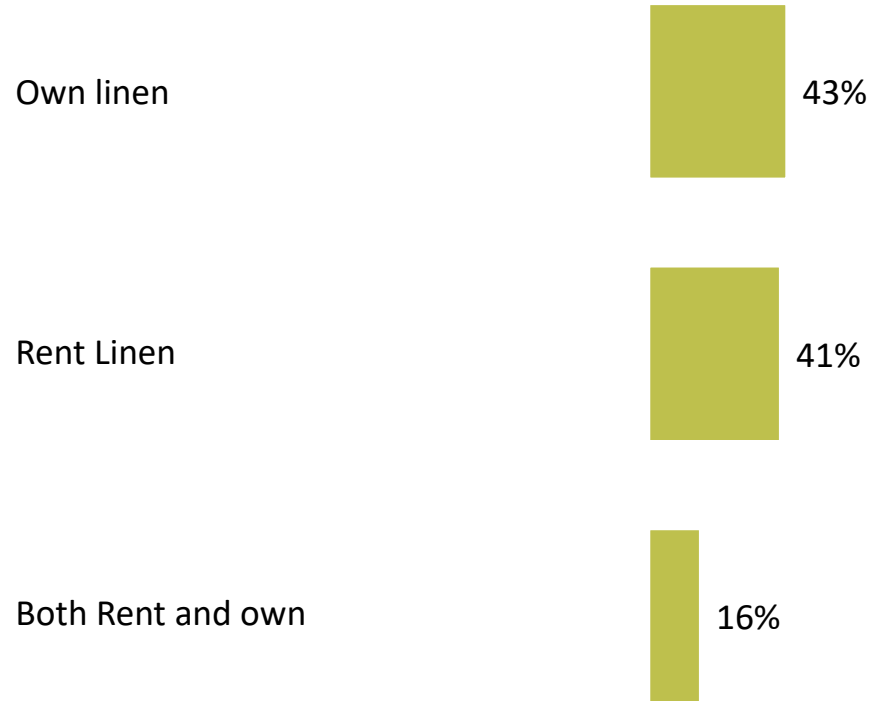
(Base: all respondents- 182)



\* Caution low base

# 4 in 10 of the organisations rent linen, with a further 16% both owning and renting

(BASE : All respondents 182)



	Region			Sector			Size				
	Dublin	ROI	Munster	Con/Ulster	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+
Own linen	47	48	51	36	60	122	10	31	39	47	55
Rent Linen	26%	52%	49%	44%	60%	34%	60%	55%	44%	40%	35%
Both Rent and own	57%	38%	29%	42%	28%	48%	30%	29%	38%	43%	51%
	17%	10%	22%	14%	12%	18%	10%	16%	18%	17%	15%

# Of the overall sample for both single and multi sites half of the organisations purchase linen rental and washing services from commercial laundries

(Base: All respondents: 182)

	Region			Sector			Size					Sites	
	Dublin	ROL	Munster	Con/Ulster	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Single	Multi
Purchases linen rental and washing services from commercial laundries for all sites	47	48	51	36	60	122	10	31	39	47	55	130	52
Washes linen at in-house laundry for all sites	47	48	51	36	60	122	10	31	39	47	55	130	52
Purchases washing-only services from commercial laundry for all sites	47	48	51	36	60	122	10	31	39	47	55	130	52
Washes rented linen at in-house laundry for some sites and purchases washing services for other sites	47	48	51	36	60	122	10	31	39	47	55	130	52
Washes linen at in-house laundry for some sites and purchases washing-only services for other sites	47	48	51	36	60	122	10	31	39	47	55	130	52
Washes rented linen at in-house laundry for all sites	47	48	51	36	60	122	10	31	39	47	55	130	52

Purchases linen rental and washing services from commercial laundries for all sites **49%**

Washes linen at in-house laundry for all sites **40%**

Purchases washing-only services from commercial laundry for all sites **7%**

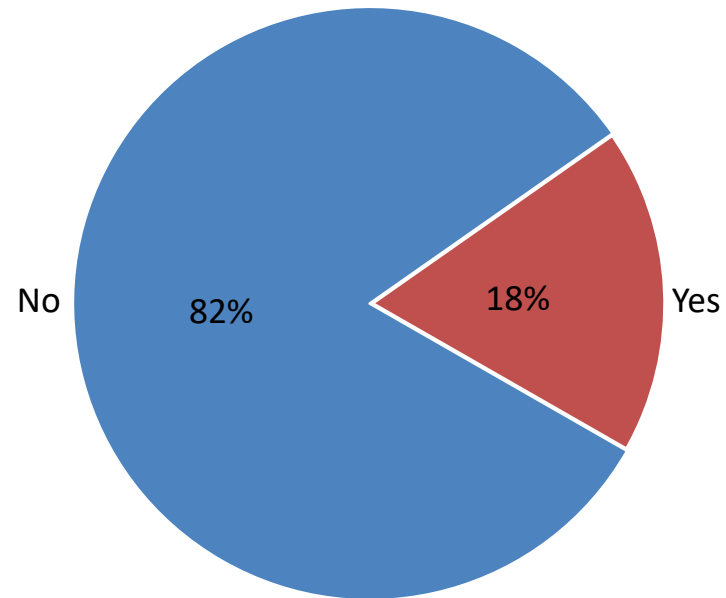
Washes rented linen at in-house laundry for some sites and purchases washing services for other sites **2%**

Washes linen at in-house laundry for some sites and purchases washing-only services for other sites **1%**

Washes rented linen at in-house laundry for all sites **1%**

# Of those that now purchase laundry services, almost one-fifth of these organisations have previously self supplied

(Base: All who purchase linen laundry services 109)



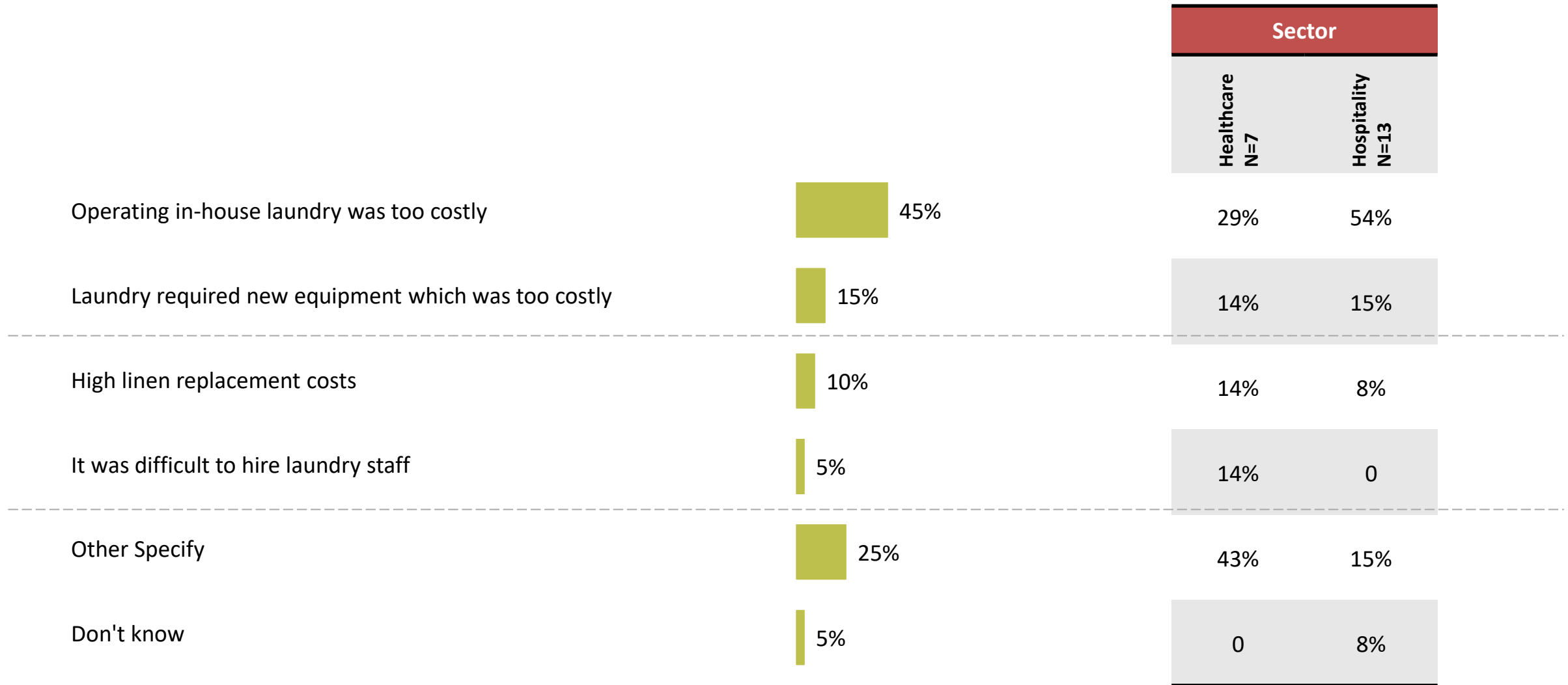
	Sector		Size				
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+
	<u>26</u>	<u>83</u>	<u>4</u>	<u>16</u>	<u>20</u>	<u>29</u>	<u>40</u>
Yes	27%	16%	25%	31%	15%	21%	13%

\* Caution low base



# Of those that previously self supplied, the expense of operating in-house was the main reason organisations stopped self supplying

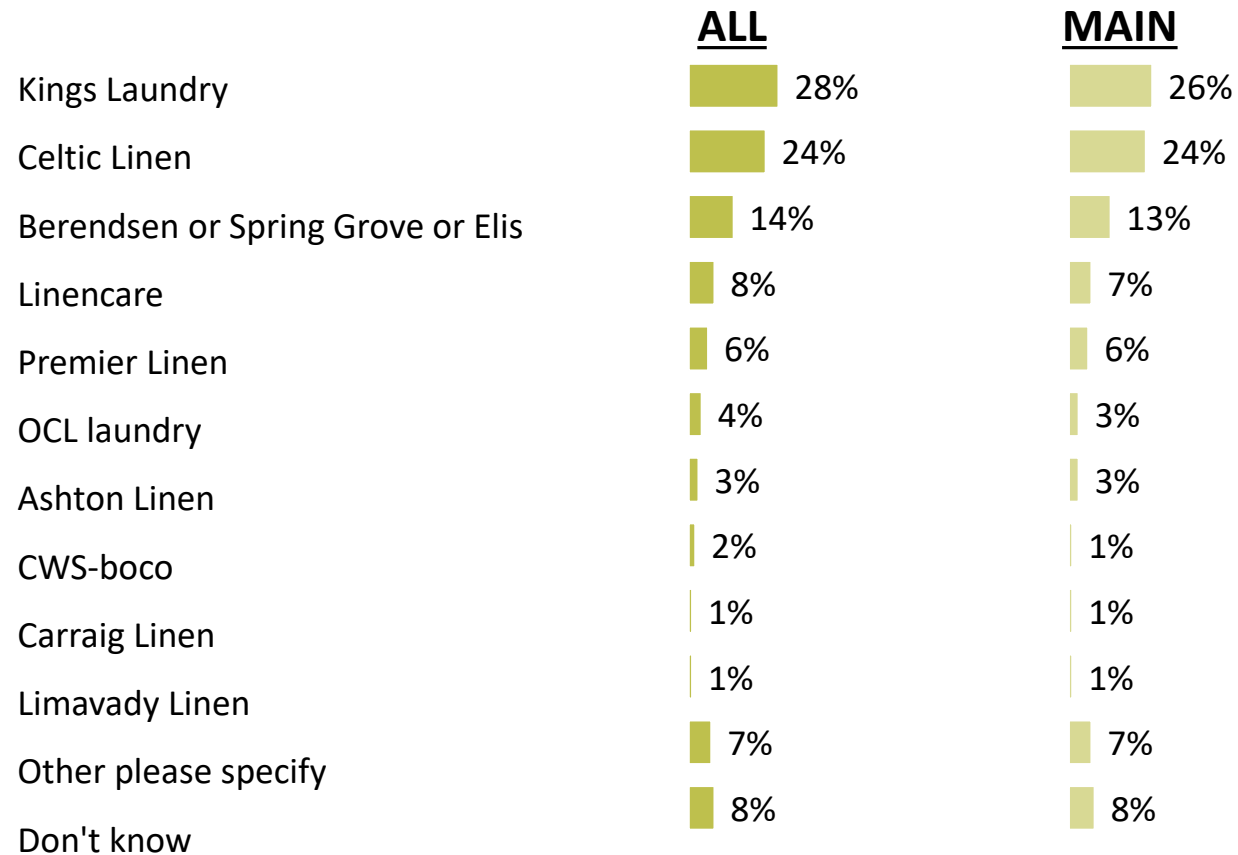
(Base: All who purchase linen laundry services now and who previously self supplied 20)\*



\* Caution low base

# Kings Laundry, Celtic Linen and Berendsen are the main laundry service providers

(Base: All who purchase linen laundry services: 109)



*Q8 Please can you explain a little more about the reasons for using more than one linen laundry?*

**N=4**

One laundry cannot meet all of our requirements	3
Competition and quality	1

# Berendsen and Celtic Linen are most popular in healthcare. Kings laundry and Celtic Linen are most popular in hospitality

(Base: All who purchase linen laundry services - 109)

	ALL												
	Region					Sector		Size					
	TOTAL	Dublin	ROL	Munster	Con/Ulster	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Purchases for al sites
<b>Base</b>	109	38	21	29	21	26	83	4	16	20	29	40	90
Kings Laundry	28%	42%	5%	28%	24%	4%	35%	25%	0	20%	14%	53%	27%
Celtic Linen	24%	24%	38%	21%	14%	31%	22%	0	31%	25%	31%	18%	28%
Berendsen/Spring Grove or Elis	14%	5%	29%	21%	5%	46%	4%	0	19%	30%	10%	8%	17%
Linencare	8%	3%	19%	0	19%	0	11%	0	13%	5%	17%	3%	9%
Premier Linen	6%	13%	10%	0	0	0	8%	0	6%	5%	14%	3%	7%
OCL laundry	4%	3%	0	3%	10%	0	5%	0	0	0	10%	3%	2%
Ashton Linen	3%	3%	0	7%	0	4%	2%	25%	0	0	7%	0	3%
CWS-boco	2%	3%	0	0	5%	4%	1%	0	0	0	7%	0	2%
Carraig Linen	1%	3%	0	0	0	0	1%	0	0	5%	0	0	1%
Limavady Linen	1%	0	0	0	5%	0	1%	0	6%	0	0	0	1%
Other please specify	7%	3%	0	10%	19%	12%	6%	0	25%	5%	0	8%	1%
Don't know	8%	11%	5%	10%	5%	8%	8%	50%	0	10%	3%	10%	9%

	MAIN												
	Region					Sector		Size					
	TOTAL	Dublin	ROL	Munster	Con/Ulster	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Purchases for al sites
<b>Base</b>	109	38	21	29	21	26	83	4	16	20	29	40	90
Kings Laundry	26%	37%	5%	28%	24%	4%	33%	25%	0	15%	10%	53%	24%
Celtic Linen	24%	24%	38%	21%	14%	31%	22%	0	31%	25%	31%	18%	28%
Berendsen/Spring Grove or Elis	13%	5%	24%	21%	5%	42%	4%	0	19%	30%	10%	5%	16%
Linencare	7%	0	19%	0	19%	0	10%	0	13%	5%	14%	3%	8%
Premier Linen	6%	13%	10%	0	0	0	8%	0	6%	5%	14%	3%	7%
OCL laundry	3%	0	0	3%	10%	0	4%	0	0	7%	3%	0	1%
Ashton Linen	3%	3%	0	7%	0	4%	2%	25%	0	0	7%	0	3%
CWS-boco	1%	3%	0	0	0	0	1%	0	0	3%	0	0	1%
Carraig Linen	1%	3%	0	0	0	0	1%	0	5%	0	0	0	1%
Limavady Linen	1%	0	0	0	5%	0	1%	0	6%	0	0	0	1%
Other please specify	7%	3%	0	10%	19%	12%	6%	0	25%	5%	0	8%	1%
Don't know	8%	11%	5%	10%	5%	8%	8%	50%	0	10%	3%	10%	9%

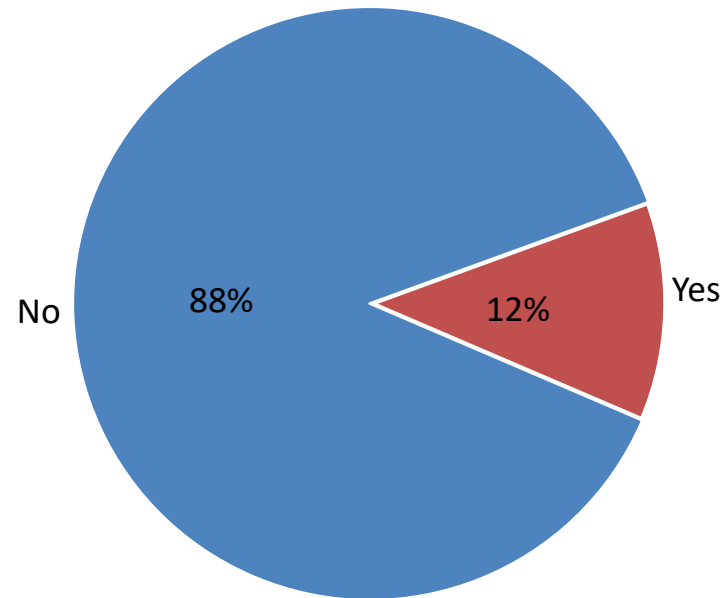
\* Caution low base

Q7a Which linen laundry service provider(s) does your organisation currently use?

Q7a1 Which is your main linen laundry service provider?

# Just over 10% of organisations who currently do not purchase laundry services have done so in the past

(Base: All who do not purchase laundry services- 73)



	Region		Sector			Size					
	Dublin	ROL	Munster	Con/Ulster	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+
<b>Base</b>	<u>9</u>	<u>27</u>	<u>22</u>	<u>15</u>	<u>34</u>	<u>39</u>	<u>6</u>	<u>15</u>	<u>19</u>	<u>18</u>	<u>15</u>

Yes 22% 11% 5% 20% 9% 15% 0 7% 11% 11% 27%

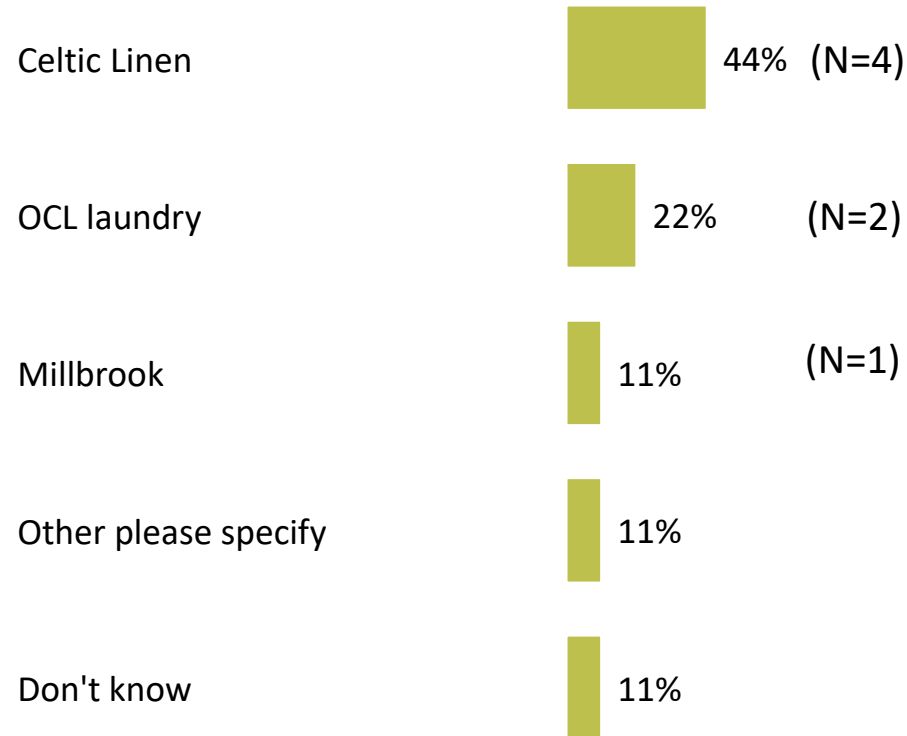
\* Caution low base

# Celtic Linen was the most popular provider for those who used to purchase laundry services

(Base: All who do not purchase laundry services but did previously 9\*)

Frequency reported due to small base size

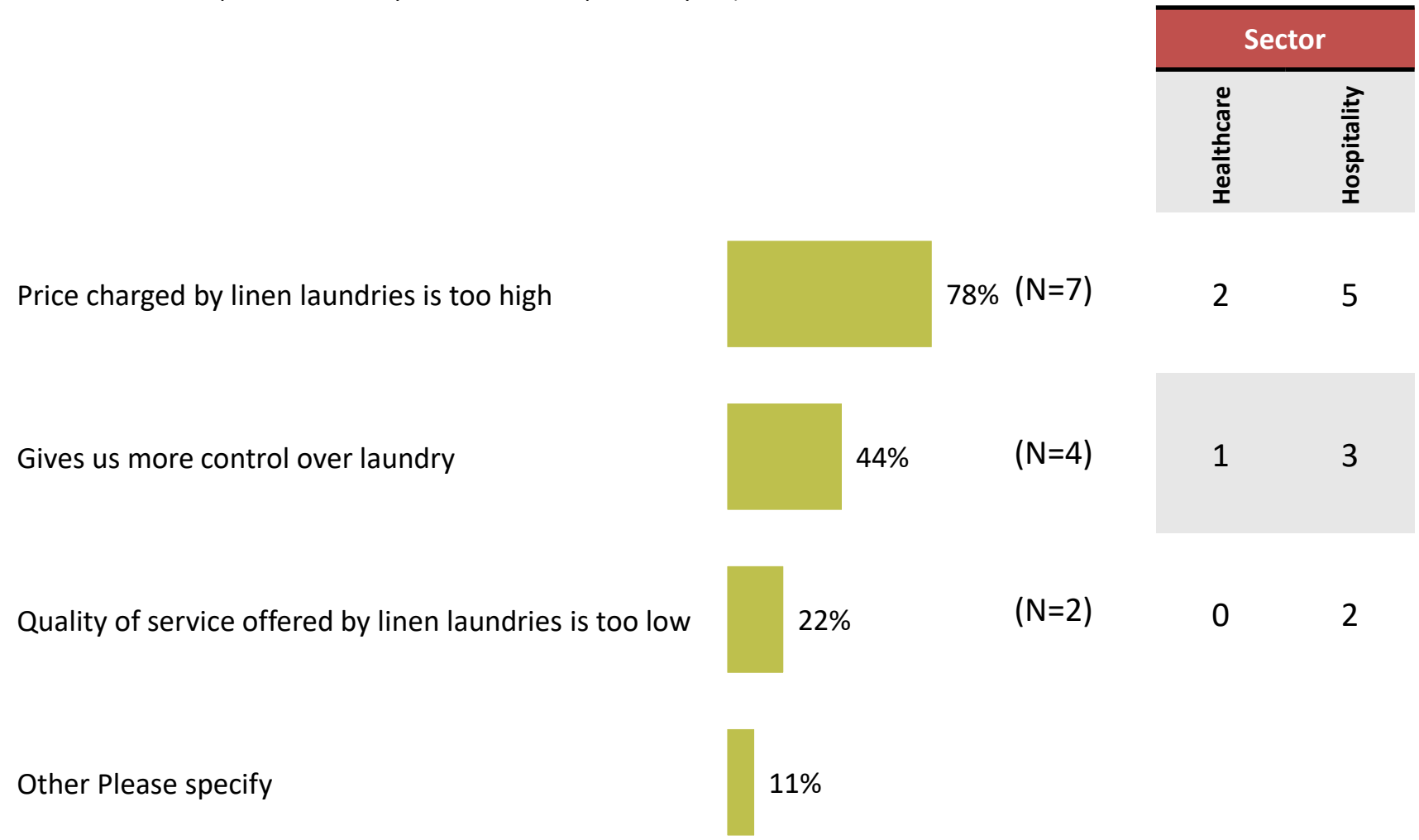
	Region			Sector			Size				
	Dublin	ROL	Munster	Con/Ulster	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+
Celtic Linen	1	1	1	1	1	3	0	1	0	2	1
OCL laundry	0	0	0	2	0	2	0	0	0	2	0
Millbrook	1	0	0	0	0	1	0	0	0	1	0



\* Caution low base

# Cost was the main reason these organisations stopped using linen laundries

(Base: All who do not purchase laundry services but did previously 9\*)



*Q11a b) when was this decision made?*

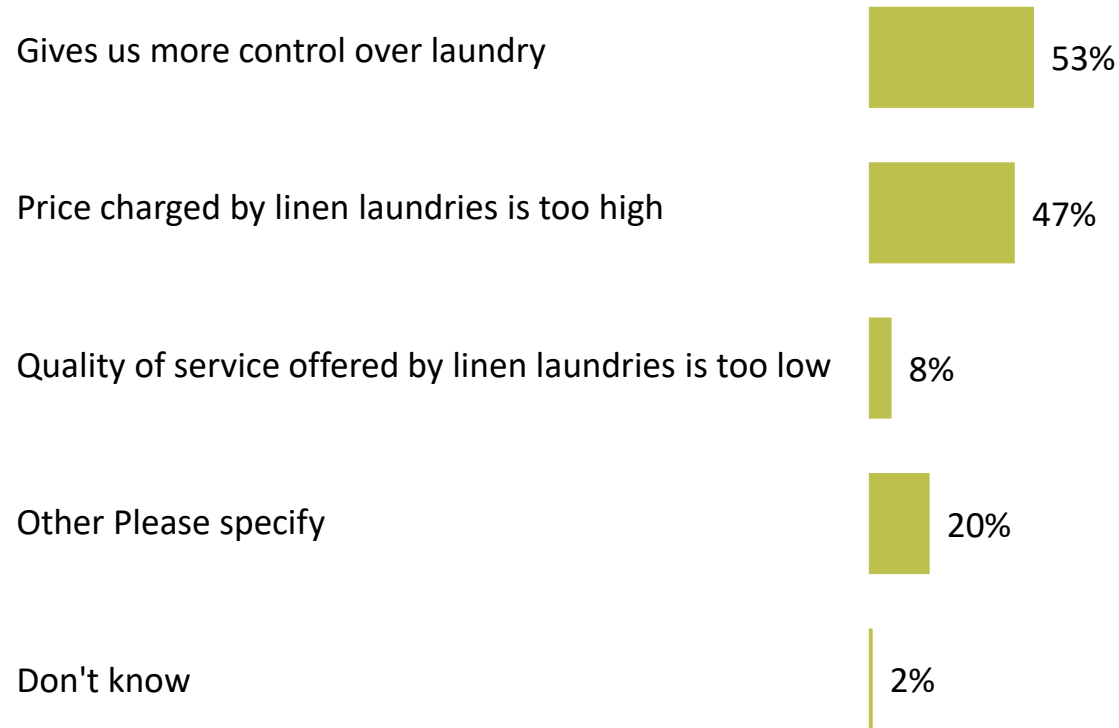
**N=8**

Months	Frequency
16	1
18	1
36	1
48	1
96	1
108	1
120	1
144	1

\* Caution low base

# For those who have solely provided their own laundry services, control and cost are the main reasons behind this decision

(Base: All who do not purchase laundry services and did not purchase previously: 64)

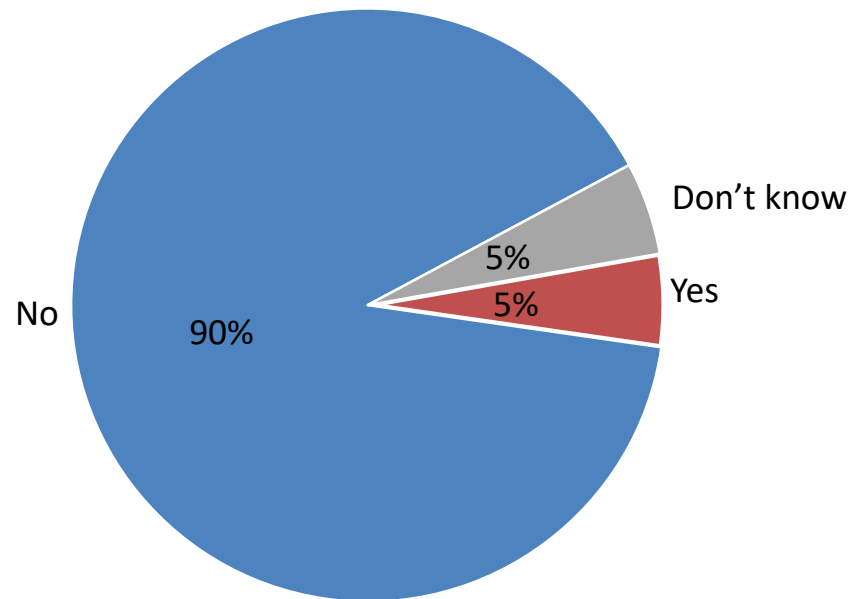


	Region			Sector			Size					Sites	
	Dublin	ROL	Munster	Con/Ulster	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Single	Multi
	7	24	21	12	31	33	6	14	17	16	11	47	17
Gives us more control over laundry	43%	58%	52%	50%	58%	48%	17%	43%	71%	56%	55%	49%	65%
Price charged by linen laundries is too high	57%	54%	43%	33%	42%	52%	83%	36%	47%	38%	55%	53%	29%
Quality of service offered by linen laundries is too low	29%	8%	5%	0	16%	0	0	7%	12%	6%	9%	9%	6%
Other Please specify	14%	17%	24%	25%	23%	18%	33%	36%	6%	19%	18%	17%	29%
Don't know	0	4%	0	0	0	3%	0	7%	0	0	0	2%	0

\* Caution low base

# The majority of those who do not purchase laundry services do not intend to do so in the next 2 – 3 years

(Base: All who do not purchase laundry services- 73)



## If yes, why?

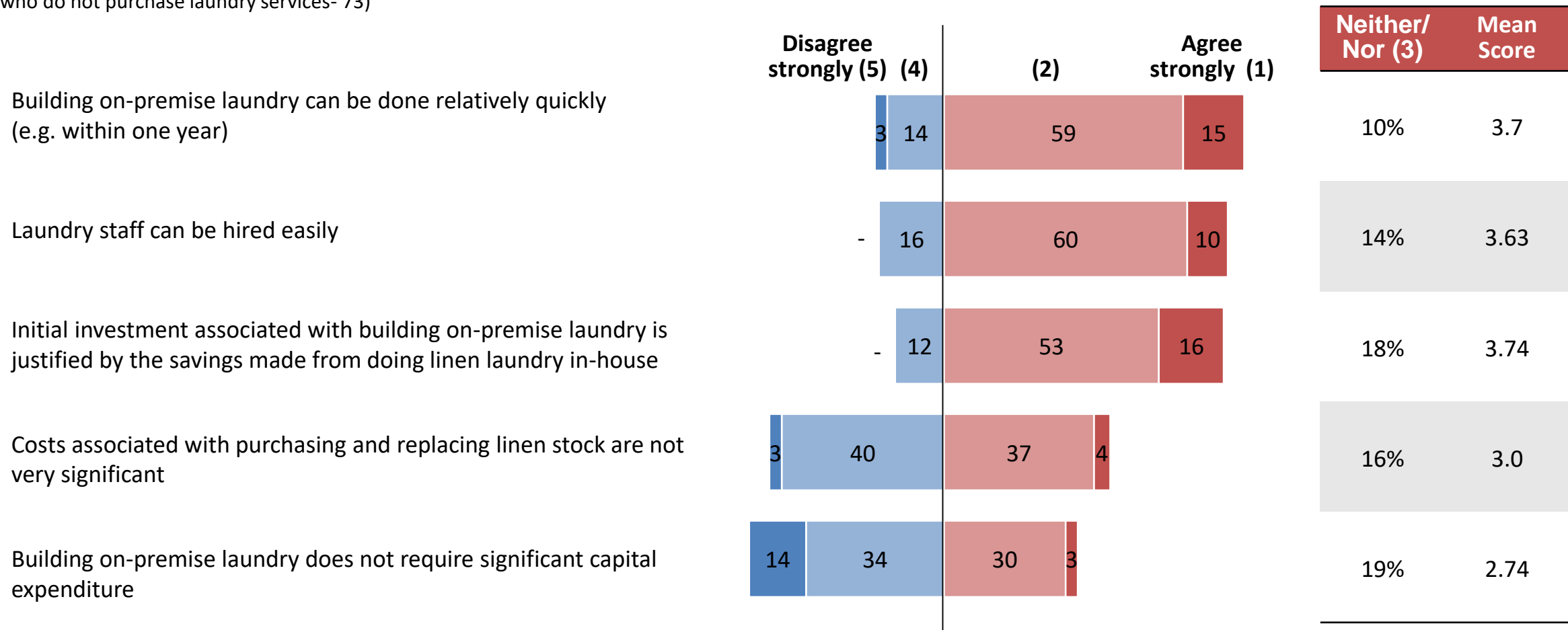
- Operating in-house laundry is too costly (1)
- High linen replacement costs (1)
- Competitive price (1)
- All equipment needed we have in house (1)

	Region			Sector			Size				
	Dublin	ROL	Munster	Con/Ulster	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+
No	9	27	22	15	34	39	6	15	19	18	15
Yes	11%	7%	5%	0	6%	5%	17%	0	5%	0	13%
Don't know	0	7%	5%	7%	6%	5%	0	7%	5%	6%	7%



# Views of those who do not currently purchase laundry services

(Base: All who do not purchase laundry services- 73)

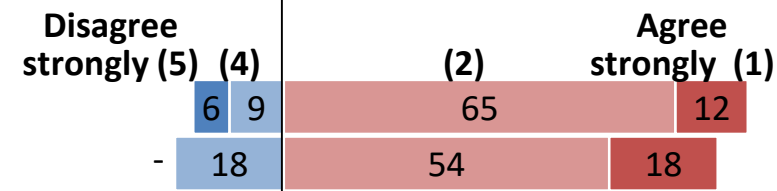


# Views of those who do not currently purchase laundry services by Healthcare and Hospitality sectors

(Base: All who do not purchase laundry services- 73)

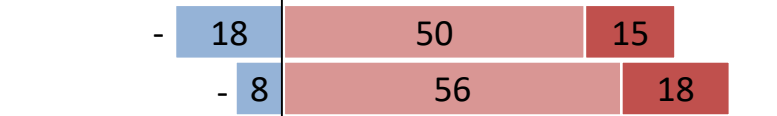
Healthcare n=34\*  
 Hospitality n=39\*

Building on-premise laundry can be done relatively quickly



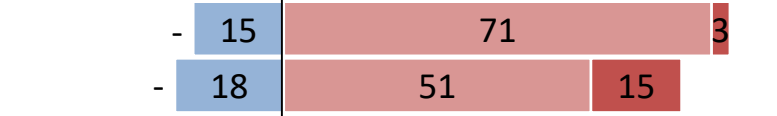
Neither/Nor (3)	Mean Score
9%	3.68
10%	3.72

Initial investment associated with building on-premise laundry is justified by the savings made from doing linen laundry in-house



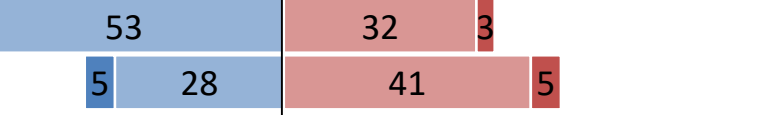
Neither/Nor (3)	Mean Score
18%	3.62
18%	3.85

Laundry staff can be hired easily



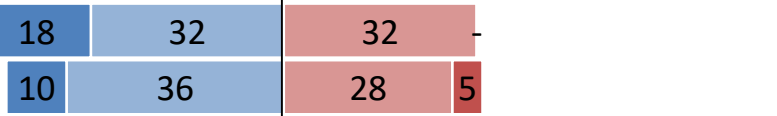
Neither/Nor (3)	Mean Score
12%	3.62
15%	3.64

Costs associated with purchasing and replacing linen stock are not very significant



Neither/Nor (3)	Mean Score
12%	2.85
21%	3.13

Building on-premise laundry does not require significant capital expenditure

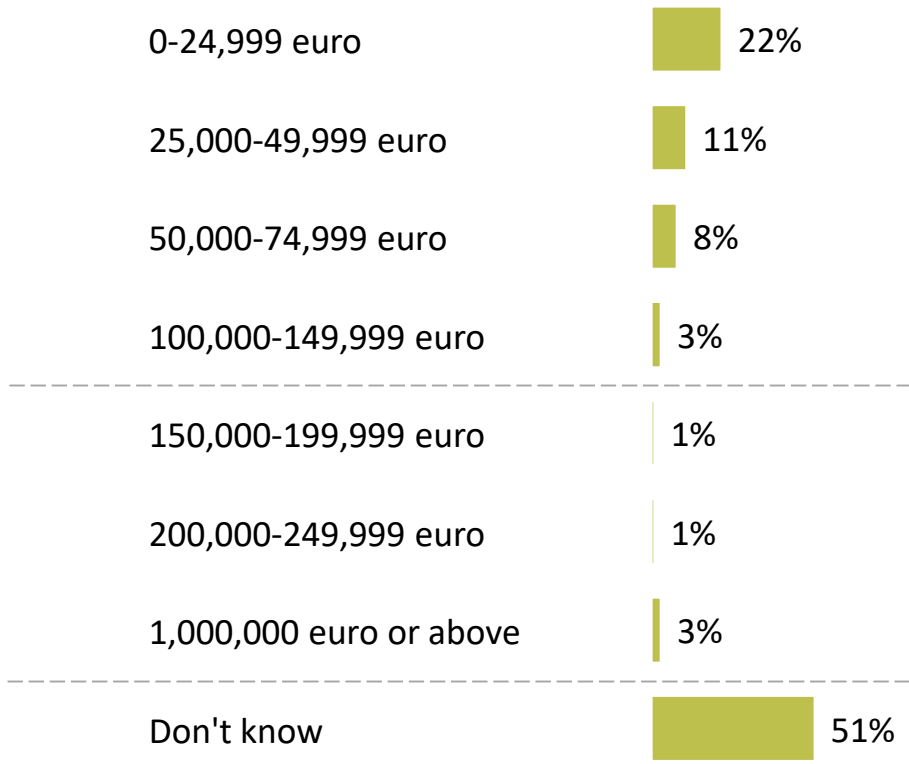


Neither/Nor (3)	Mean Score
18%	2.65
21%	2.82

\* Caution low base

# 33% indicated that their annual operating costs were lower than €50,000. 51% did not know their annual operating costs

(Base: All who do not purchase laundry services- 73)

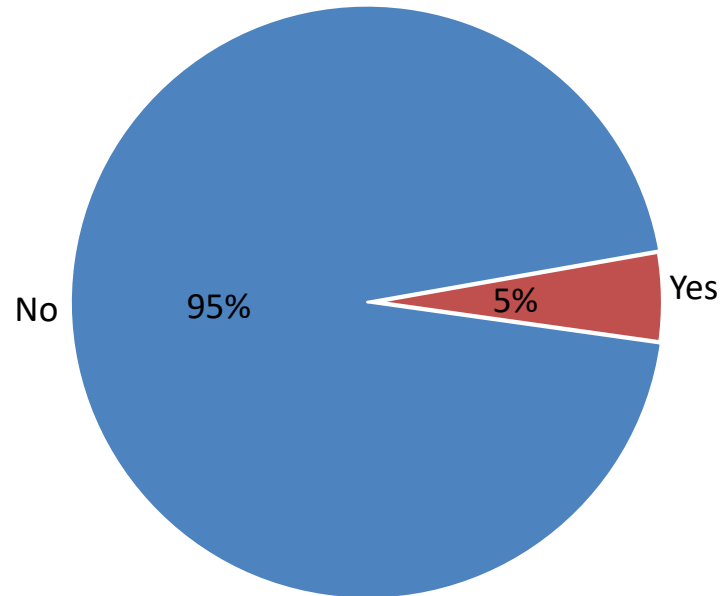


Sector		Size				
Healthcare	Hospitality	<10	10-24	25-49	50-99	100+
34	39	6	15	19	18	15
18%	26%	67%	47%	21%	6%	0
21%	3%	0	0	16%	22%	7%
6%	10%	0	7%	5%	0	27%
0	5%	0	0	5%	6%	0
0	3%	0	0	0	6%	0
3%	0	0	0	0	6%	0
6%	0	0	0	0	0	13%
47%	54%	33%	47%	53%	56%	53%

# Only 5% of those with an in-house laundry provide services to 3<sup>rd</sup> parties

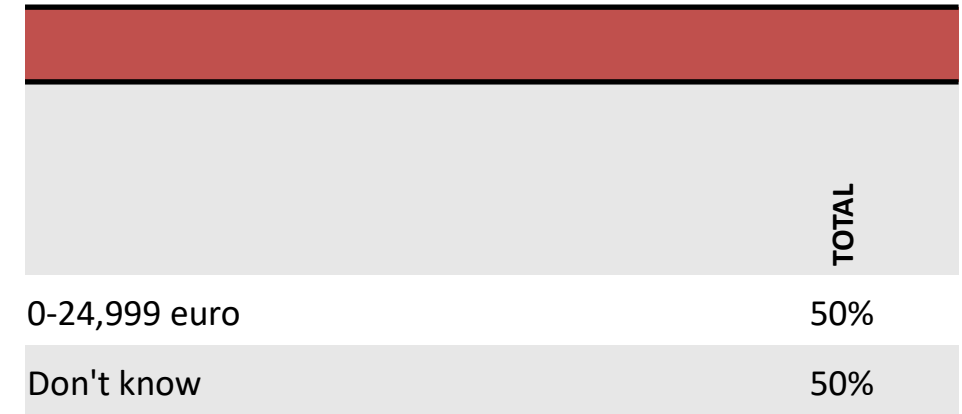
(Base: All who do not purchase laundry services- 73)

## Provide Linen Laundry services to independent 3<sup>rd</sup> parties



## Annual revenue from the provision of linen laundry services to independent third parties

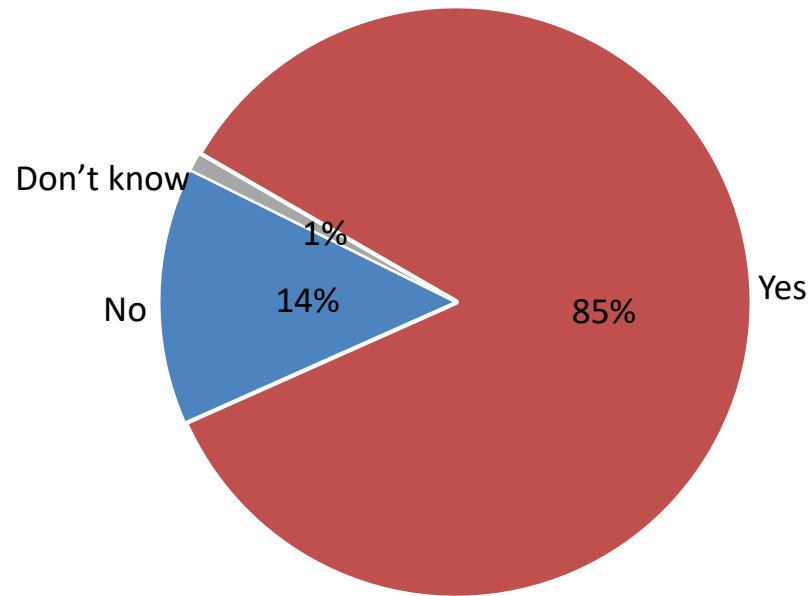
N=4



	Sector		Size				
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+
No	34	39	6	15	19	18	15
Yes	3%	8%	0	7%	0	0	20%

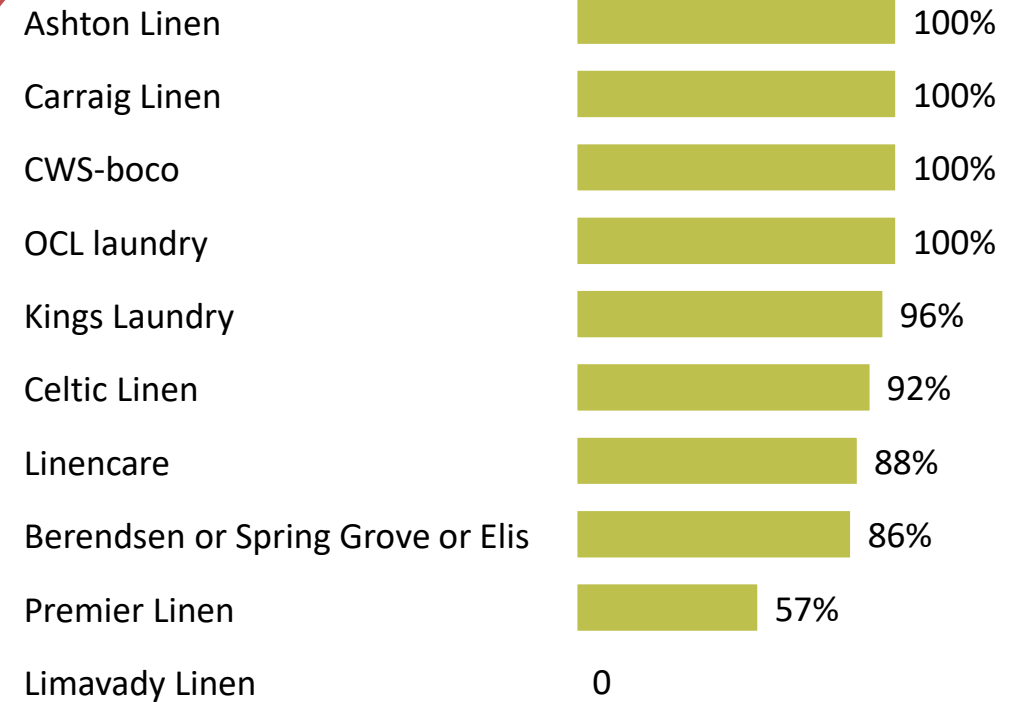
# The vast majority of those who purchase linen laundry services have a contract with their main supplier

(Base: All who purchase linen laundry services - 109)



	Sector		Size					Purchases for all sites
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	
	26	83	4	16	20	29	40	90
Yes	88%	84%	75%	63%	100%	79%	93%	86%

## Demographics for Yes: Main Service Provider



# The majority (90%) of contracts are for three years or less

(Base: All who have a contract with their main supplier: 78)

Months	Sector			Size					Main Service Provider									
	TOTAL	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Ashton Linen	Berendsen/Sgrove/Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Linencare	OCL laundry	Premier Linen	Purchases for all sites
	78	21	57	3	8	19	18	30	2	10	1	21	1	23	5	3	3	65
12	54%	43%	58%	67%	50%	68%	56%	43%	50%	70%	100%	52%	100%	48%	20%	67%	67%	52%
18	1%	0	2%	0	13%	0	0	0	0	0	0	5%	0	0	0	0	0	2%
24	17%	19%	16%	33%	13%	5%	22%	20%	0	10%	0	10%	0	17%	40%	33%	0	18%
36	18%	24%	16%	0	0	21%	11%	27%	50%	10%	0	19%	0	30%	20%	0	0	18%
46	1%	5%	0	0	0	0	0	3%	0	0	0	5%	0	0	0	0	0	2%
48	1%	0	2%	0	0	0	0	3%	0	0	0	0	0	0	0	0	0	0
60	3%	0	4%	0	13%	0	0	3%	0	0	0	0	0	4%	20%	0	0	2%
96	1%	0	2%	0	0	0	6%	0	0	0	0	0	0	0	0	0	33%	2%
120	1%	5%	0	0	0	5%	0	0	0	10%	0	0	0	0	0	0	0	2%
144	1%	5%	0	0	0	0	6%	0	0	0	0	5%	0	0	0	0	0	2%
240	1%	0	2%	0	13%	0	0	0	0	0	0	5%	0	0	0	0	0	2%

# The most common form of payment is per item fee

(Base: All who purchase linen laundry services - 109)

Fixed annual fee

3%

Fixed monthly fee

32%

Per item fee

61%

Don't know

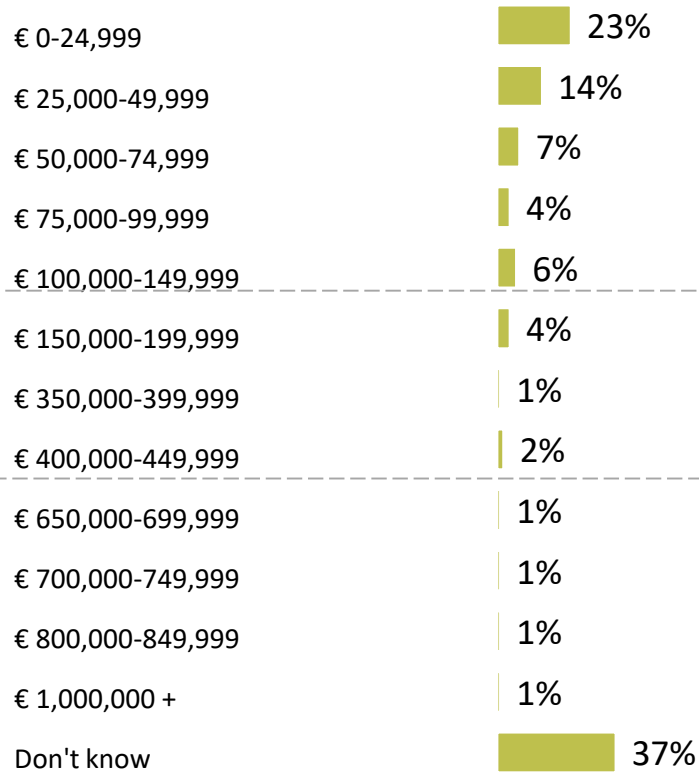
5%

	Sector		Size					Main Service Provider										
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Ashton Linen	Berendsen/Sgrove/Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady Linen	Linencare	OCL laundry	Premier Linen	Purchases for all sites
	26	83	4	16	20	29	40	3	14	1	26	1	28	1	8	3	7	90
Fixed annual fee	12%	0	0	6%	0	3%	3%	33%	7%	0	0	0	0	0	0	0	0	2%
Fixed monthly fee	27%	34%	25%	38%	35%	21%	38%	0	29%	0	27%	100%	43%	0	38%	33%	29%	29%
Per item fee	54%	62%	75%	50%	65%	72%	53%	67%	50%	100%	73%	0	54%	100%	63%	67%	71%	63%
Don't know	8%	4%	0	6%	0	3%	8%	0	14%	0	0	0	4%	0	0	0	0	6%

\* Caution low base

# The majority spend less than 150,000 a year on laundry services

(Base: All who purchase linen laundry services - 109)

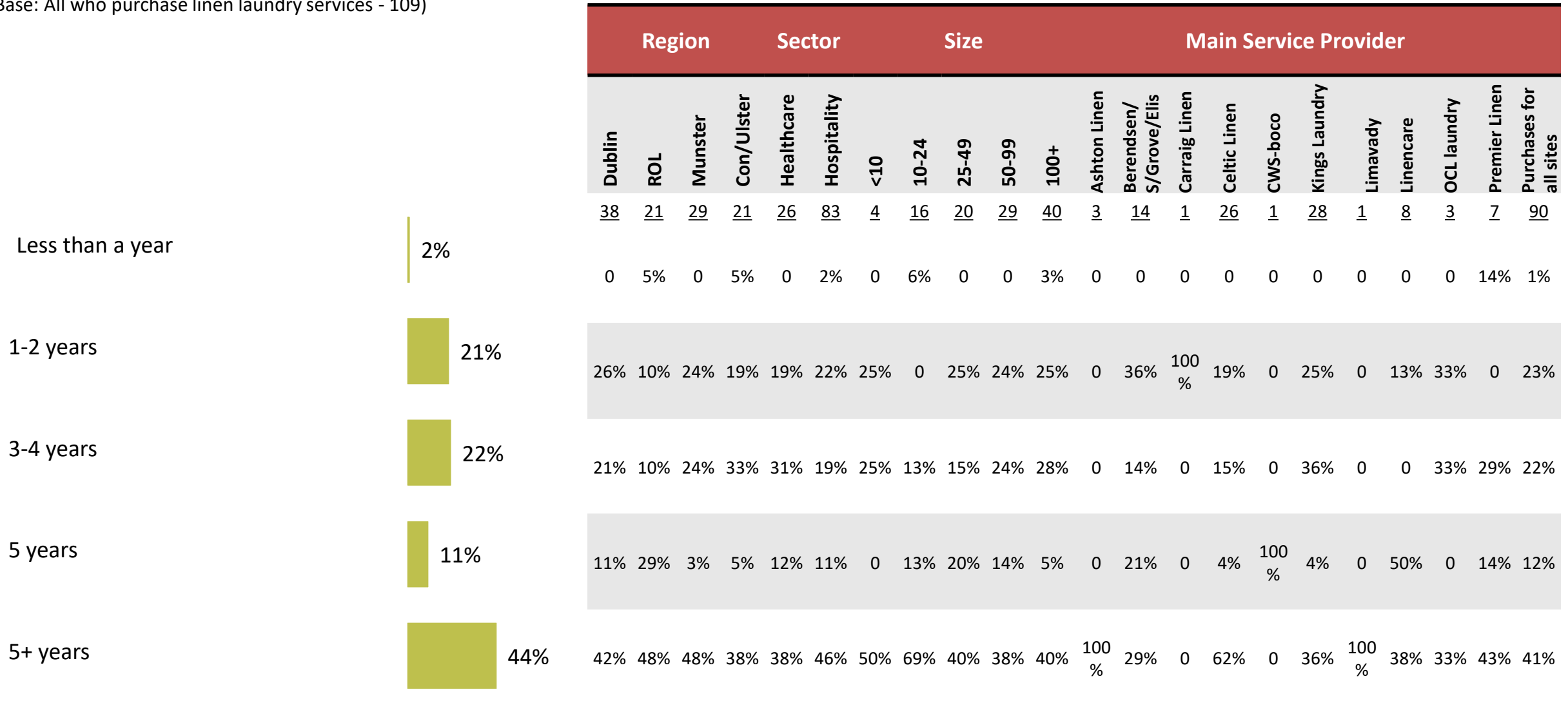


Sector	Size						Main Service Provider											
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Ashton Linen	Berendsen/S/Grove/Eli	Carrraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady	Linencare	OCL laundry	Premier Linen	Purchases for all sites
	26	83	4	16	20	29	40	3	14	1	26	1	28	1	8	3	7	90
	23%	23%	50%	63%	25%	17%	8%	33%	29%	100%	31%	100%	11%	0	13%	0	14%	23%
	23%	11%	25%	13%	15%	17%	10%	0	14%	0	15%	0	14%	0	0	0	14%	13%
	0	10%	0	0	5%	14%	8%	0	7%	0	4%	0	11%	0	0	0	43%	8%
	0	5%	0	6%	0	7%	3%	0	0	0	4%	0	4%	100%	13%	0	0	4%
	4%	6%	0	0	5%	0	13%	0	0	0	4%	0	11%	0	0	33%	0	4%
	0	5%	0	0	0	0	10%	0	0	0	0	0	14%	0	0	0	0	3%
	0	1%	0	0	5%	0	0	0	0	0	0	0	0	0	0	0	0	1%
	4%	1%	0	0	0	0	5%	0	0	0	4%	0	4%	0	0	0	0	2%
	0	1%	0	0	0	0	3%	0	0	0	0	0	0	0	13%	0	0	1%
	0	1%	0	0	0	3%	0	0	0	0	4%	0	0	0	0	0	0	1%
	0	1%	0	0	5%	0	0	0	0	0	4%	0	0	0	0	0	0	1%
	4%	0	0	0	0	0	3%	0	0	0	4%	0	0	0	0	0	0	1%
	42%	35%	25%	19%	40%	41%	40%	67%	50%	0	27%	0	32%	0	63%	67%	29%	36%



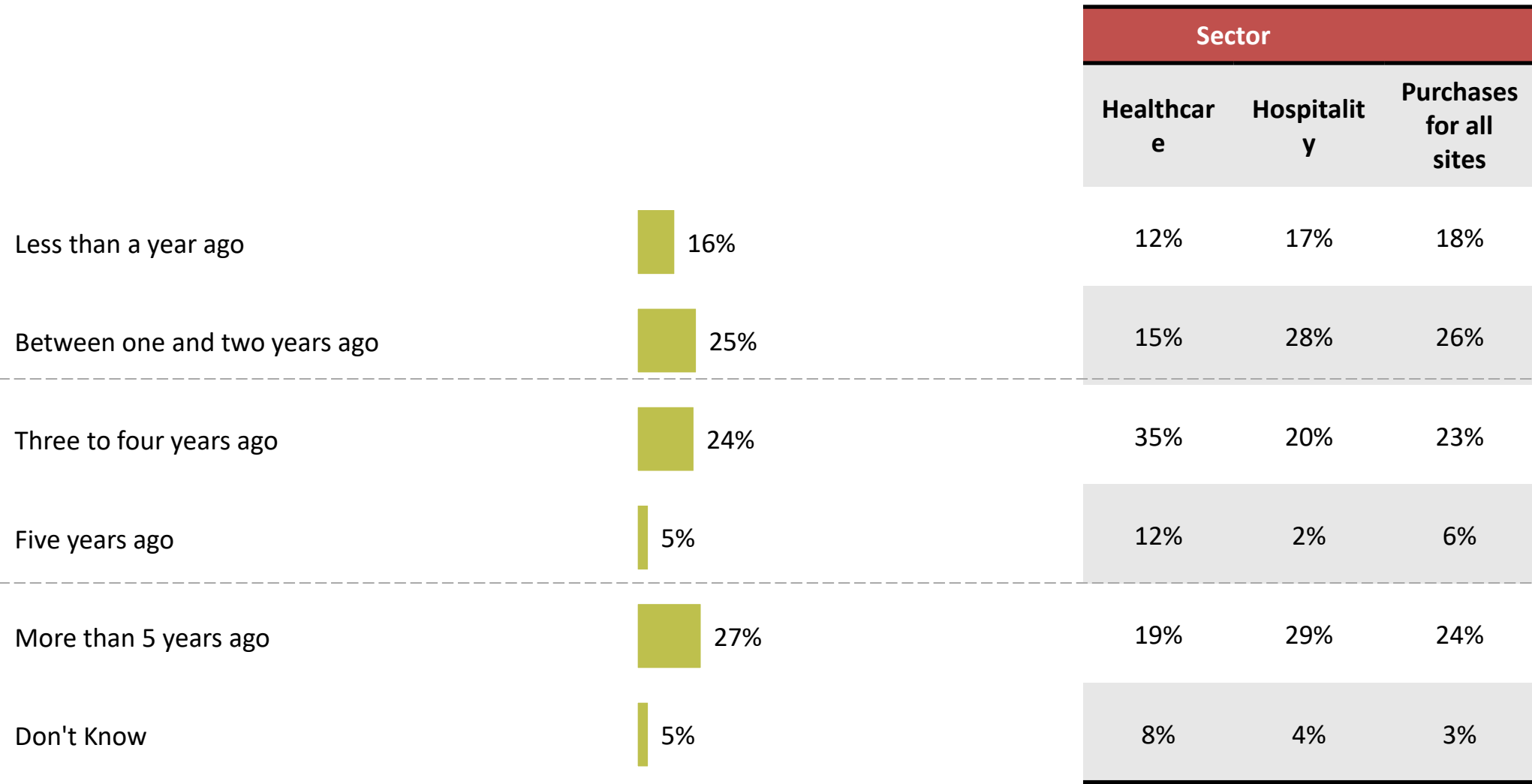
# Over four in ten have been with their current linen supplier for 5 years or more

(Base: All who purchase linen laundry services - 109)



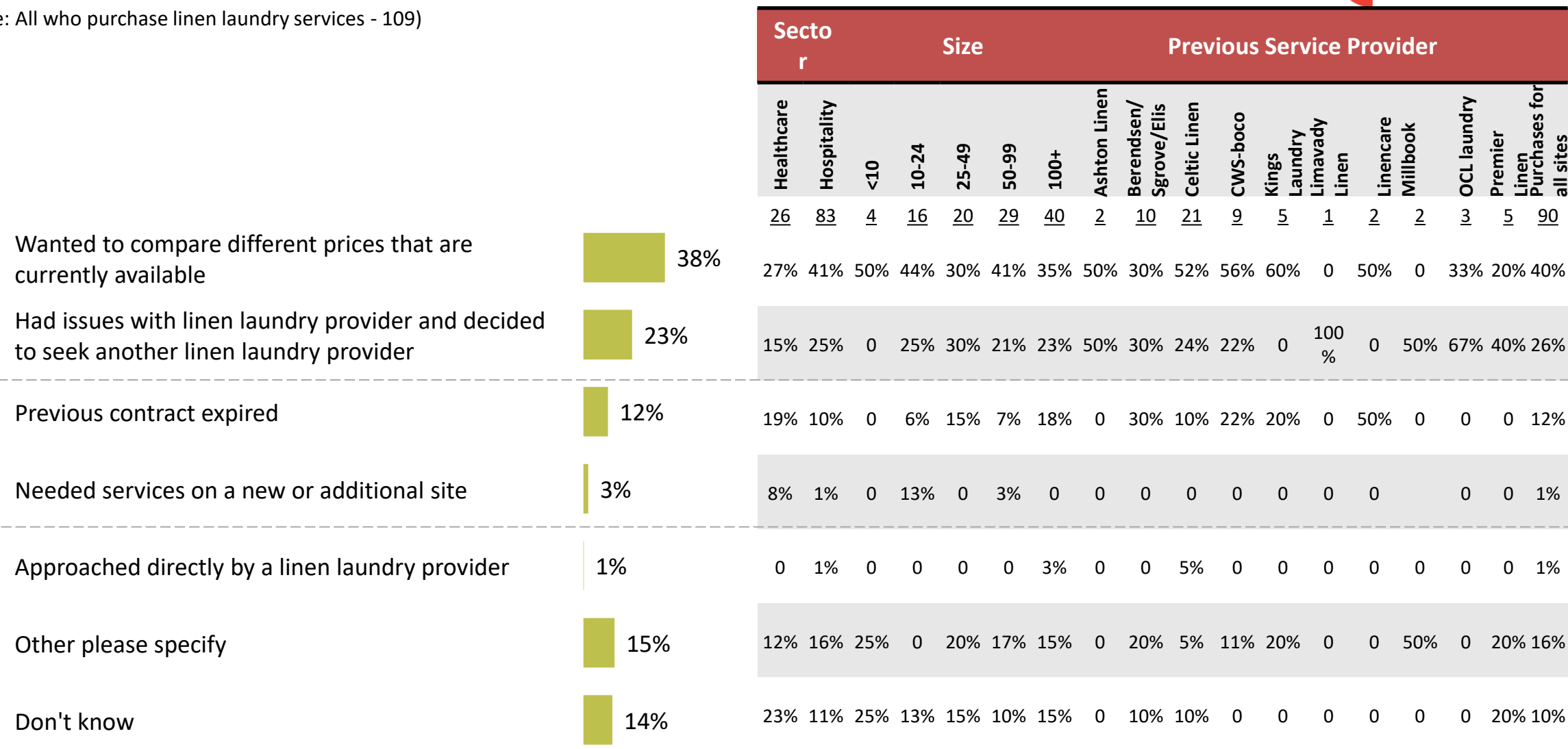
# Almost three in ten (27%) have not procured laundry services in the last five years

(Base: All who purchase linen laundry services - 109)



# A price comparison is the most likely trigger of a procurement exercise

(Base: All who purchase linen laundry services - 109)



# Celtic Linen was the most common previous provider

(Base: All who purchase linen laundry services - 109)

Previous Provider	Sector		Size					Main Service Provider										
	Hospitality	Healthcare	<10	10-24	25-49	50-99	100+	Ashton Linen	Berendsen/Sgrove/Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady Linen	Linencare	OCL laundry	Premier Linen	Purchases for all sites
Celtic Linen	26	83	4	16	20	29	40	3	14	1	26	1	28	1	8	3	7	90
Berendsen or Spring Grove or Elis	15%	20%	25%	19%	15%	17%	23%	33%	7%	0	35%	0	18%	0	0	33%	43%	20%
CWS-boco	23%	5%	0	6%	15%	0	15%	0	36%	0	8%	0	11%	0	0	0	0	11%
Kings Laundry	4%	10%	0	6%	5%	17%	5%	0	0	0	12%	100%	11%	0	0	33%	0	9%
Premier Linen	4%	5%	0	0	10%	3%	5%	0	7%	0	4%	0	7%	0	0	0	14%	4%
OCL laundry	0	6%	0	0	5%	0	10%	0	0	100%	4%	0	7%	0	0	0	14%	4%
Ashton Linen	0	4%	0	6%	5%	3%	0	0	7%	0	8%	0	0	0	0	0	0	3%
Linencare	4%	1%	0	0	5%	3%	0	33%	0	0	0	0	0	13%	0	0	0	2%
Millbrook	0	2%	0	0	0	7%	0	0	0	0	8%	0	0	0	0	0	0	2%
Limavady Linen	0	1%	0	6%	0	0	0	0	0	0	0	0	100%	0	0	0	0	1%
Other please specify	0	2%	0	0	0	7%	0	0	0	0	8%	0	0	0	0	0	0	2%
Don't know	0	1%	0	6%	0	0	0	0	0	0	0	0	0	100%	0	0	0	1%
	19%	13%	0	13%	25%	21%	8%	0	29%	0	12%	0	11%	0	13%	33%	0	14%
	31%	31%	75%	44%	20%	24%	33%	33%	14%	0	15%	0	36%	0	50%	0	29%	27%

# Previous provider by current provider

(Base: All who purchase linen laundry services - 109)

Previous	Current Main Service Provider												
	Total Previous	Ashton Linen	Berendsen or Spring Grove or Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady Linen	Linencare	Millbrook	OCL laundry	Premier Linen	DK/other
Ashton Linen	2	1							1				
Berendsen or Spring Grove or Elis	10		5		2		3						
Celtic Linen	21	1	1		9		5			1	3	1	
CWS-boco	9				3	1	3			1			1
Kings Laundry	5		1		1		2				1		
Limavady Linen	1							1					
Linencare	2								2				
OCL laundry	3		1		2								
Premier Linen	5			1	1		2				1		
Millbrook	2				2								

# Previous provider by current provider - healthcare

(Base: All who purchase linen laundry services – healthcare only - 26)

	Current Main Service Provider												
	Total Previous	Ashton Linen	Berendsen or Spring Grove or Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady Linen	Linencare	Millbrook	OCL laundry	Premier Linen	DK/other
Ashton Linen	1	1											
Berendsen or Spring Grove or Elis	6		4		2								
Celtic Linen	4		1		3								
CWS-boco	1				1								
Kings Laundry	1		1										

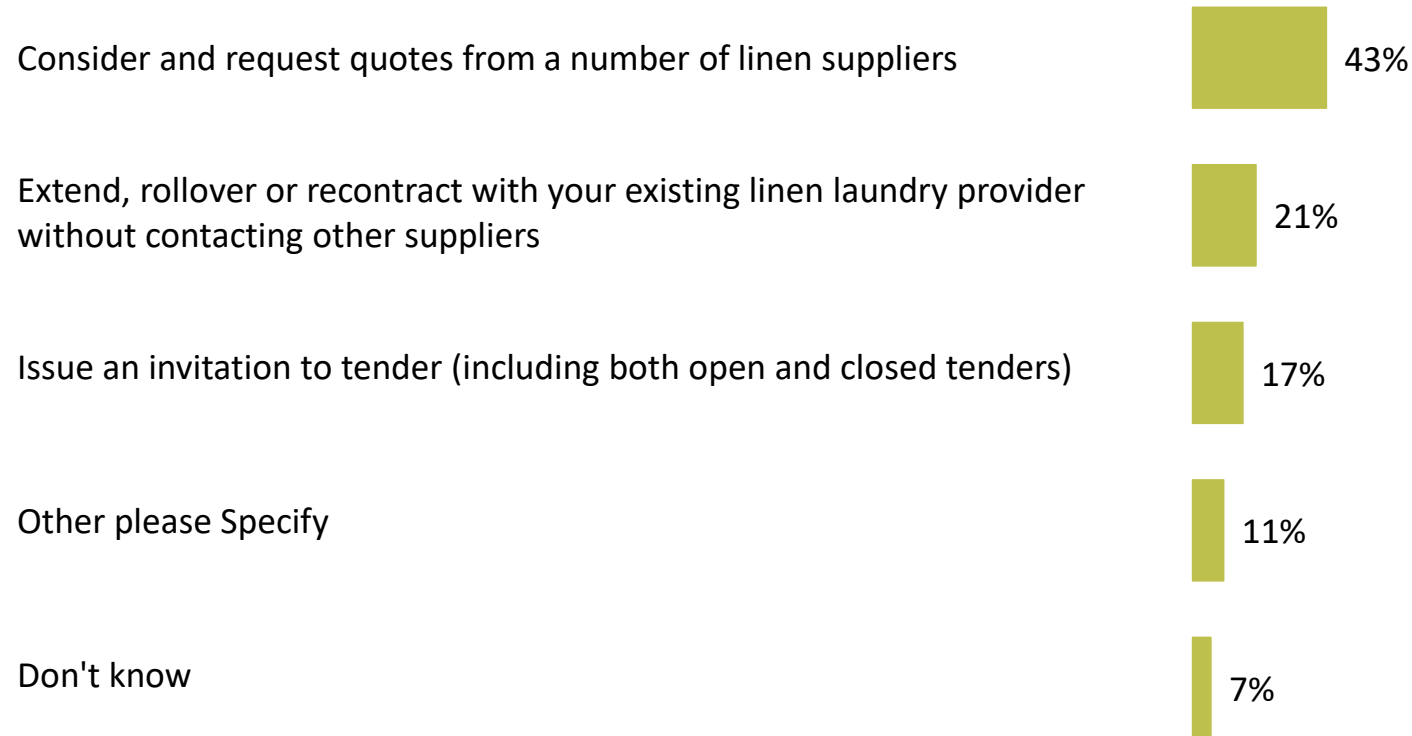
# Previous provider by current provider – hospitality

(Base: All who purchase linen laundry services – hospitality only - 83)

	Current Main Service Provider												
	Total Previous	Ashton Linen	Berendsen or Spring Grove or Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady Linen	Linencare	Millbrook	OCL laundry	Premier Linen	DK/other
Ashton Linen	1								1				
Berendsen or Spring Grove or Elis	4		1				3						
Celtic Linen	17	1			6		5			1	3	1	
CWS-boco	8				2	1	3			1			1
Kings Laundry	4				1		2				1		
Limavady Linen	1							1					
Linencare	2								2				
OCL laundry	3		1		2								
Premier Linen	5			1	1		2				1		
Millbrook	2				2								

# It was most common that organisations considered and requested quotes from suppliers

(Base: All who purchase linen laundry services - 109)





Sector	Size						Purchases for all sites	
	Healthcare	Hospitality	<10	10-24	25-49	50-99		100+
	26	83	4	16	20	29	40	90
	19%	51%	0	44%	50%	48%	40%	43%
	35%	17%	25%	38%	15%	24%	15%	23%
	23%	16%	50%	0	15%	14%	25%	18%
	15%	10%	25%	13%	5%	10%	13%	11%
	8%	7%	0	6%	15%	3%	8%	4%




# A good relationship is the main reason cited for extending/rolling over a contract


(Base: All who extended existing contract: 23\*)

Good relationship or happy with current provider  48%

No problems with current provider  30%

Current provider has the best prices on the market  26%

Difficulty or effort of switching  9%

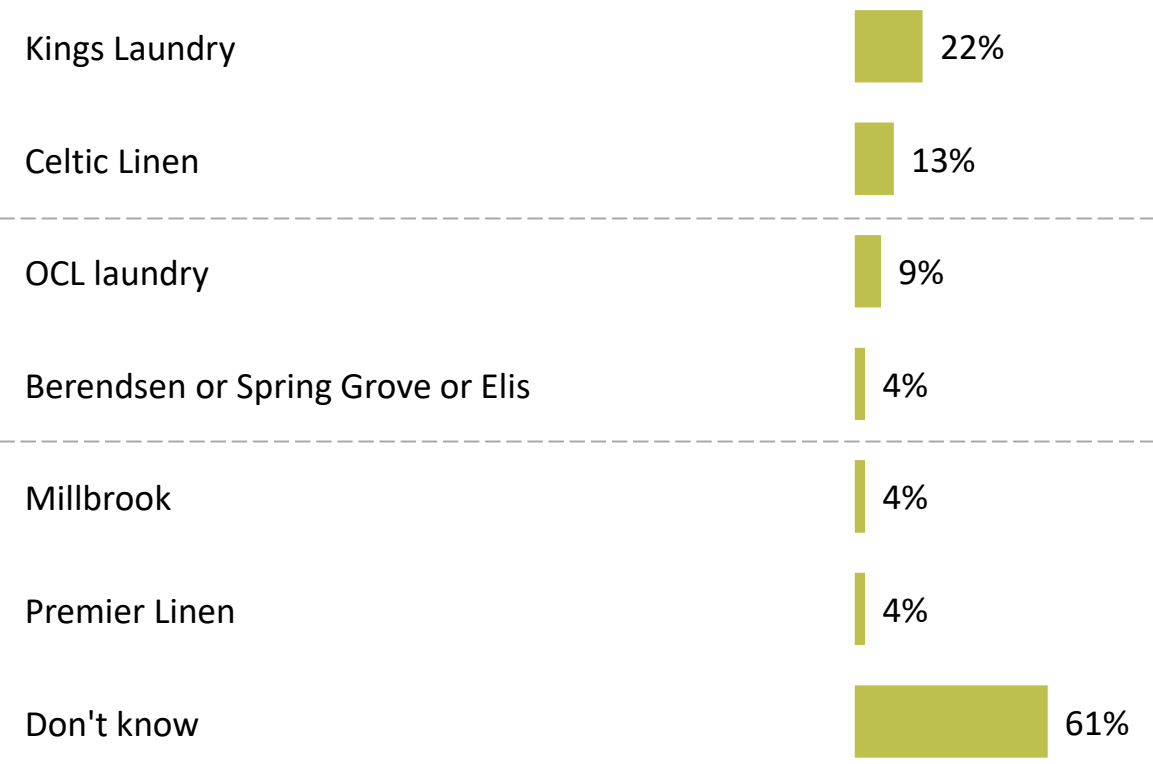
Don't Know or Cannot remember  4%

	Sector		Size					Main Service Provider							
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Ashton Lineen	Berendsen/Sgrove/Elis	Celtic Linen	CWS-boco	Kings Laundry	Linencare	Premier Linen	Purchases for all sites
	9	14	1	6	3	7	6	1	5	8	1	1	1	2	21
Good relationship or happy with current provider	56%	43%	0	67%	67%	57%	17%	100%	60%	25%	100%	0	0	100%	43%
No problems with current provider	33%	29%	0	17%	67%	29%	33%	0	40%	38%	0	0	100%	0	33%
Current provider has the best prices on the market	22%	29%	100%	17%	33%	0	50%	0	0	25%	0	100%	0	50%	24%
Difficulty or effort of switching	0	14%	0	17%	0	14%	0	0	0	25%	0	0	0	0	10%
Don't Know or Cannot remember	11%	0	0	0	0	0	17%	0	20%	0	0	0	0	0	5%

\* Caution small base size

# For those who extended/ rolled over their contract with their current provider, Kings Laundry in hospitality and Celtic Linen and Berendsen in healthcare are most likely to be recognised as a provider who can offer a similar service

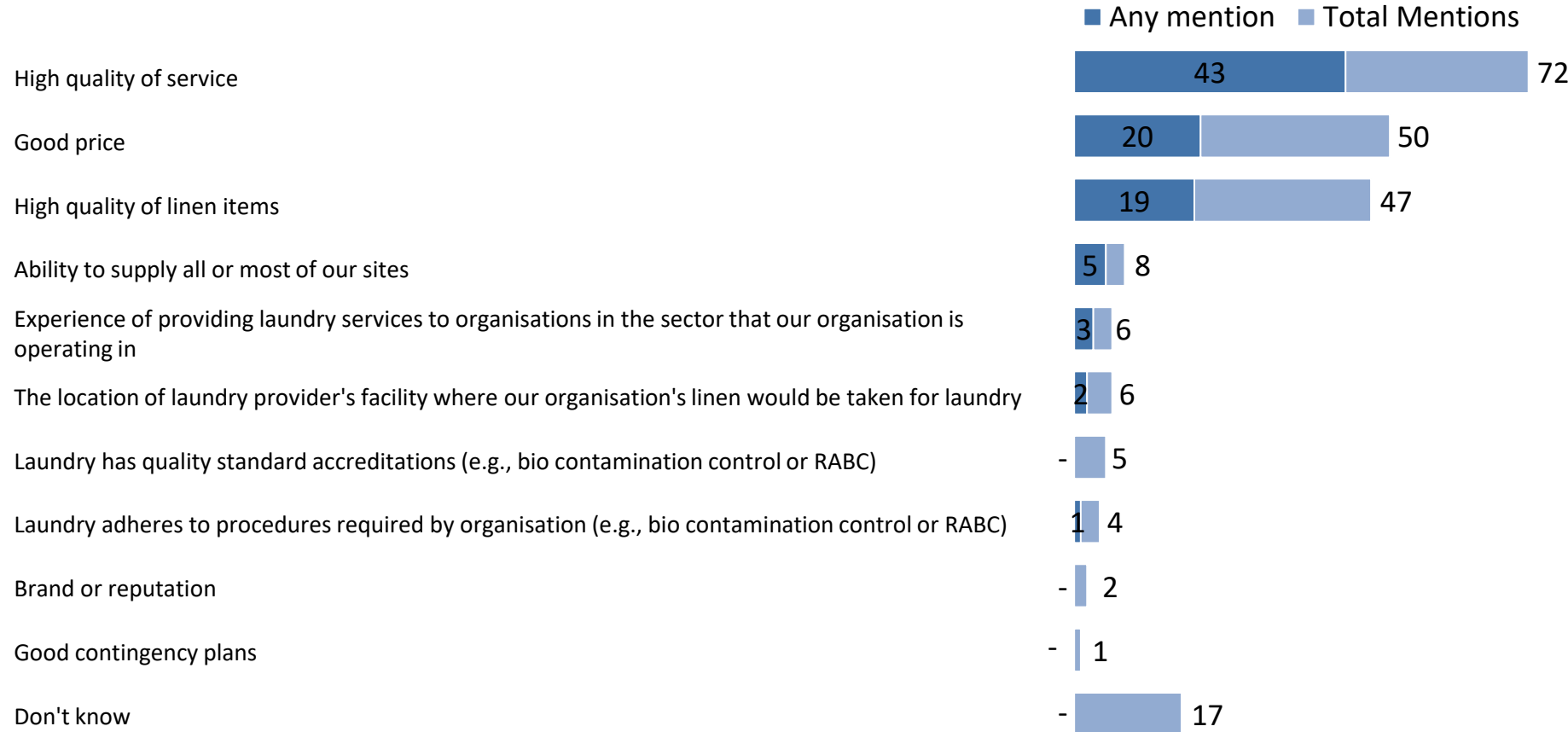
(Base: All who extended existing contract: 23\*)



Sector	Size						Purchases for all sites	
	Healthcare	Hospitality	<10	10-24	25-49	50-99		100+
Kings Laundry	9	14	1	6	3	7	6	21
Celtic Linen	0	36%	0	0	33%	43%	17%	24%
OCL laundry	22%	7%	0	0	0	14%	33%	10%
Berendsen or Spring Grove or Elis	0	14%	0	0	0	14%	17%	10%
Millbrook	11%	0	0	17%	0	0	0	5%
Premier Linen	0	7%	0	0	0	14%	0	5%
Don't know	67%	57%	100%	83%	67%	43%	50%	62%

# Quality of service is cited as the most important factor when choosing a linen laundry provider. Price and quality of linen also rank highly

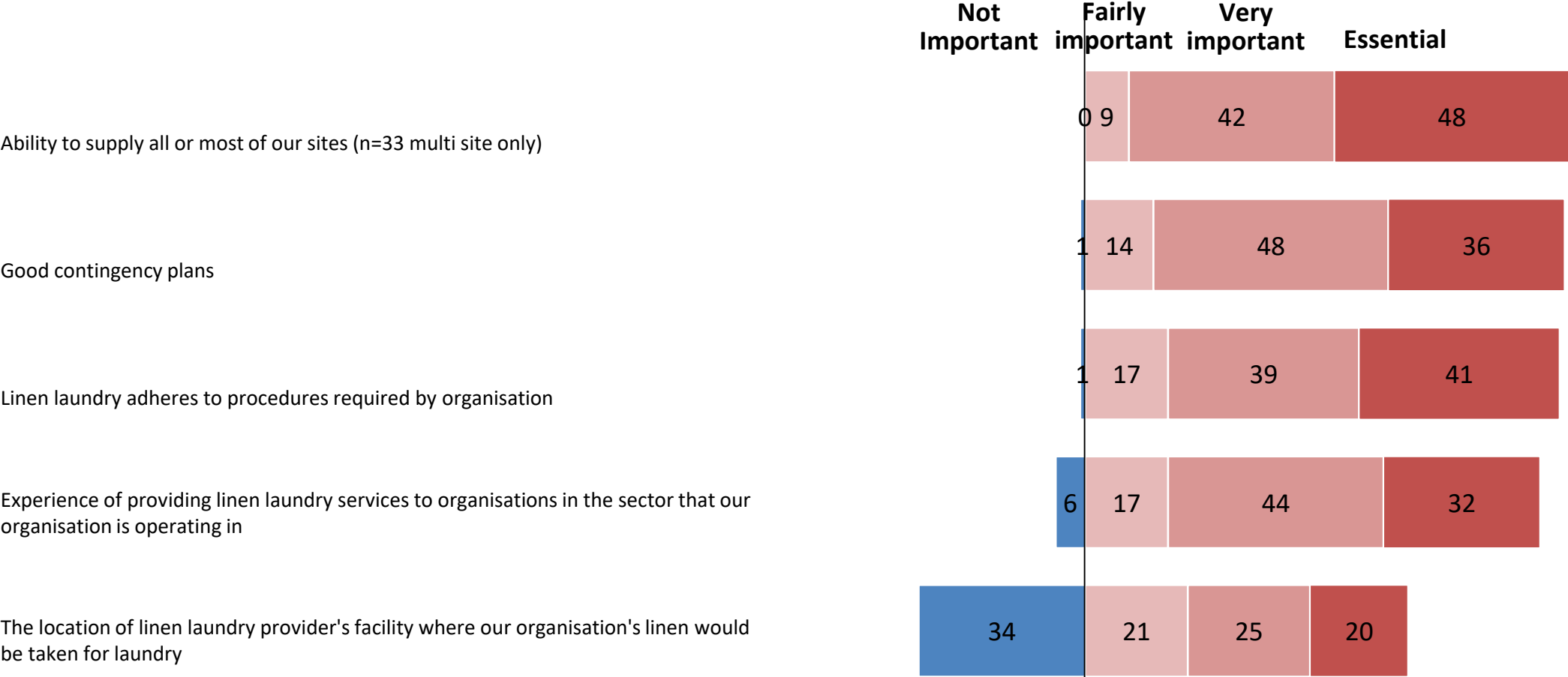
(Base: All who purchase linen laundry services - 109)



Sector	Size						Purchases for all sites	
	Healthcare	Hospitality	<10	10-24	25-49	50-99		100+
	26	83	4	16	20	29	40	90
	73%	71%	75%	44%	75%	72%	80%	70%
	50%	49%	50%	63%	35%	41%	58%	50%
	35%	51%	50%	44%	50%	55%	40%	52%
	0	11%	0	13%	10%	14%	3%	10%
	8%	6%	0	6%	10%	3%	8%	7%
	8%	5%	0	19%	5%	3%	3%	2%
	8%	4%	0	13%	0	0	8%	4%
	12%	1%	0	13%	0	0	5%	3%
	4%	1%	0	0	5%	0	3%	2%
	0	1%	0	0	0	3%	0	1%

# Prompted views of those who purchase linen laundry service

(Base: All who purchase linen laundry services - 109)



# For those who said experience with other clients in the sector is very important/ essential having knowledge of the quality of linen supply and of customer expectations in similar organisations are important

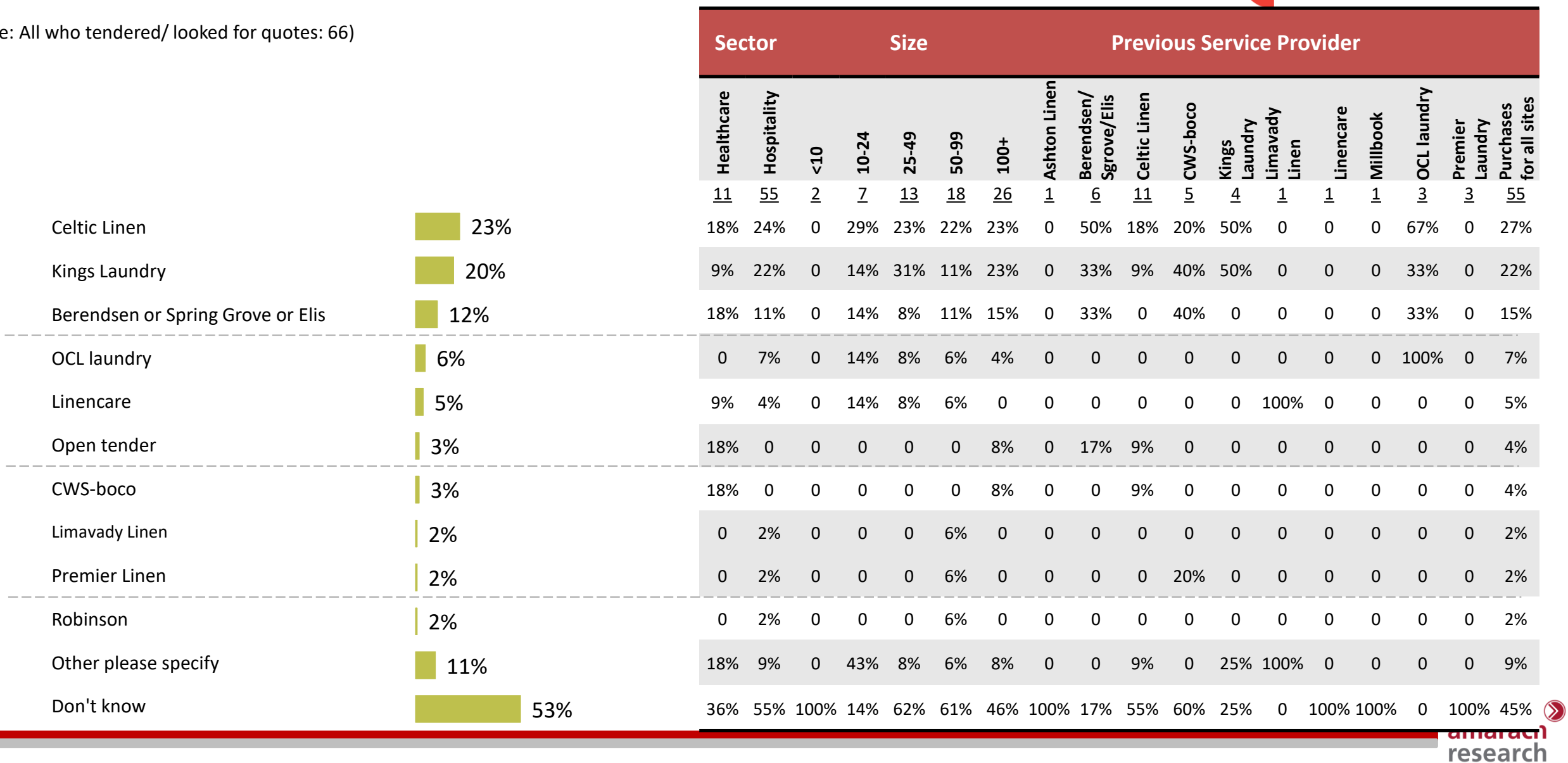
(Base: All who said *experience with other clients in their sector is very important/ essential*: 83)



Sector	Size						Purchases for all sites	
	Healthcare	Hospitality	<10	10-24	25-49	50-99		100+
	25	58	3	14	17	24	25	73
	76%	47%	67%	50%	35%	67%	60%	56%
	28%	38%	33%	36%	53%	29%	28%	34%
	4%	5%	0	0	12%	0	8%	5%
	0	19%	33%	14%	12%	8%	16%	14%
	4%	5%	0	0	6%	4%	8%	4%

# The three most popular providers that tenders were sent out to or quotes were requested from were Celtic Linen, Kings Laundry and Berendsen

(Base: All who tendered/ looked for quotes: 66)



# For those that received quotes, they felt that the number of tenders they issued or quotes received was sufficient

(BASE : Issued a tender or sent quotes– 30)

Sector	Size					Previous Service Provider							
	Healthcare	Hospitality	10-24	25-49	50-99	100+	Berendsen/S Grove/Elis	Celtic Linen	CWS - boco	Kings Laundry	Limavady Linen	OCL Laundry	Purchases for all sites
	5	25	6	5	7	12	4	4	2	3	1	3	28

The one I sent to I consider the main suppliers



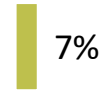
20%	20%	17%	20%	29%	17%	25%	25%	0	33%	0	33%	18%
-----	-----	-----	-----	-----	-----	-----	-----	---	-----	---	-----	-----

Thought number sent to was sufficient



0	20%	0	40%	14%	17%	0	0	0	67%	0	33%	14%
---	-----	---	-----	-----	-----	---	---	---	-----	---	-----	-----

Don't know others



0	8%	0	0	0	17%	25%	0	0	0	0	0	7%
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Other please specify



60%	40%	67%	40%	43%	33%	0	50%	100%	33%	100%	33%	43%
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Don't know

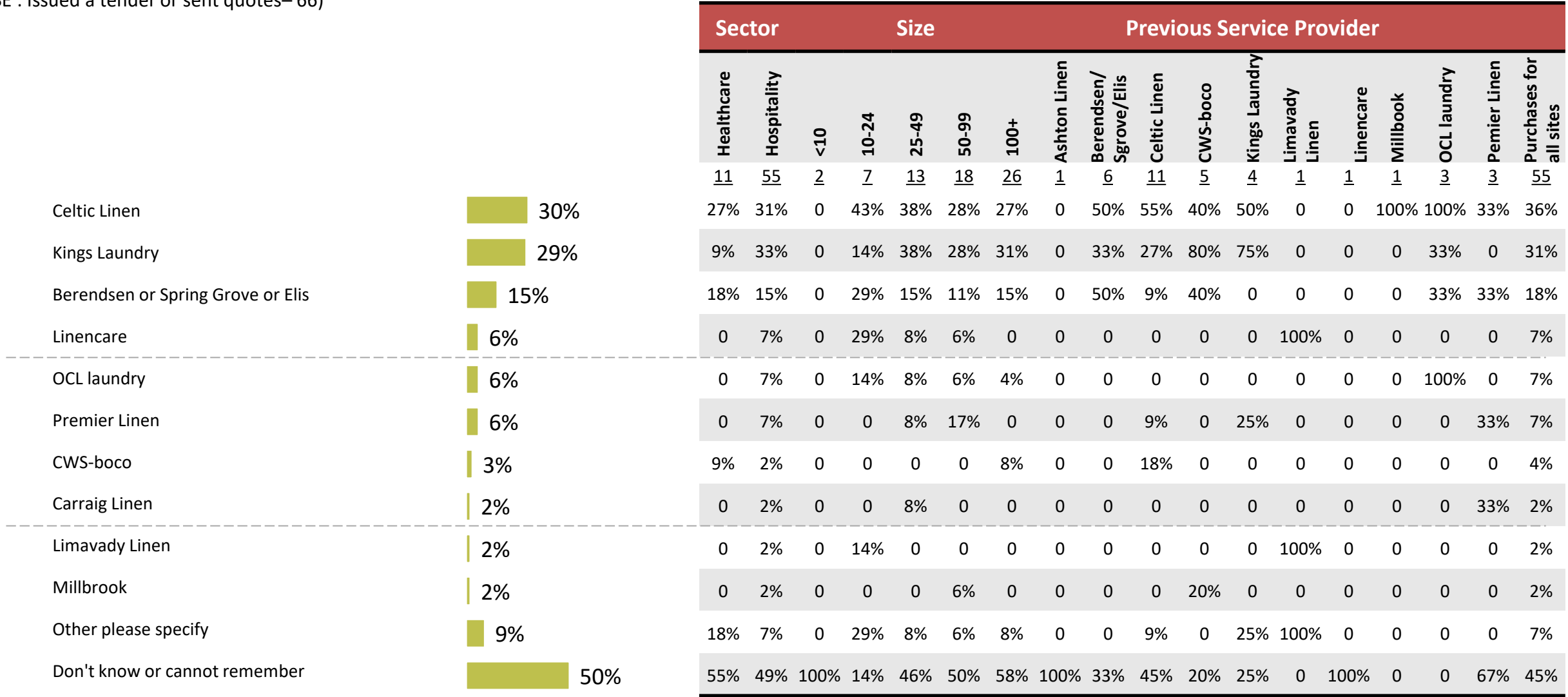


20%	16%	17%	0	14%	25%	50%	25%	0	0	0	0	18%
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Price and geographical limitations were also mentioned

# Celtic Linen, Kings Laundry and Berendsen were most likely to submit quotes/ tenders...

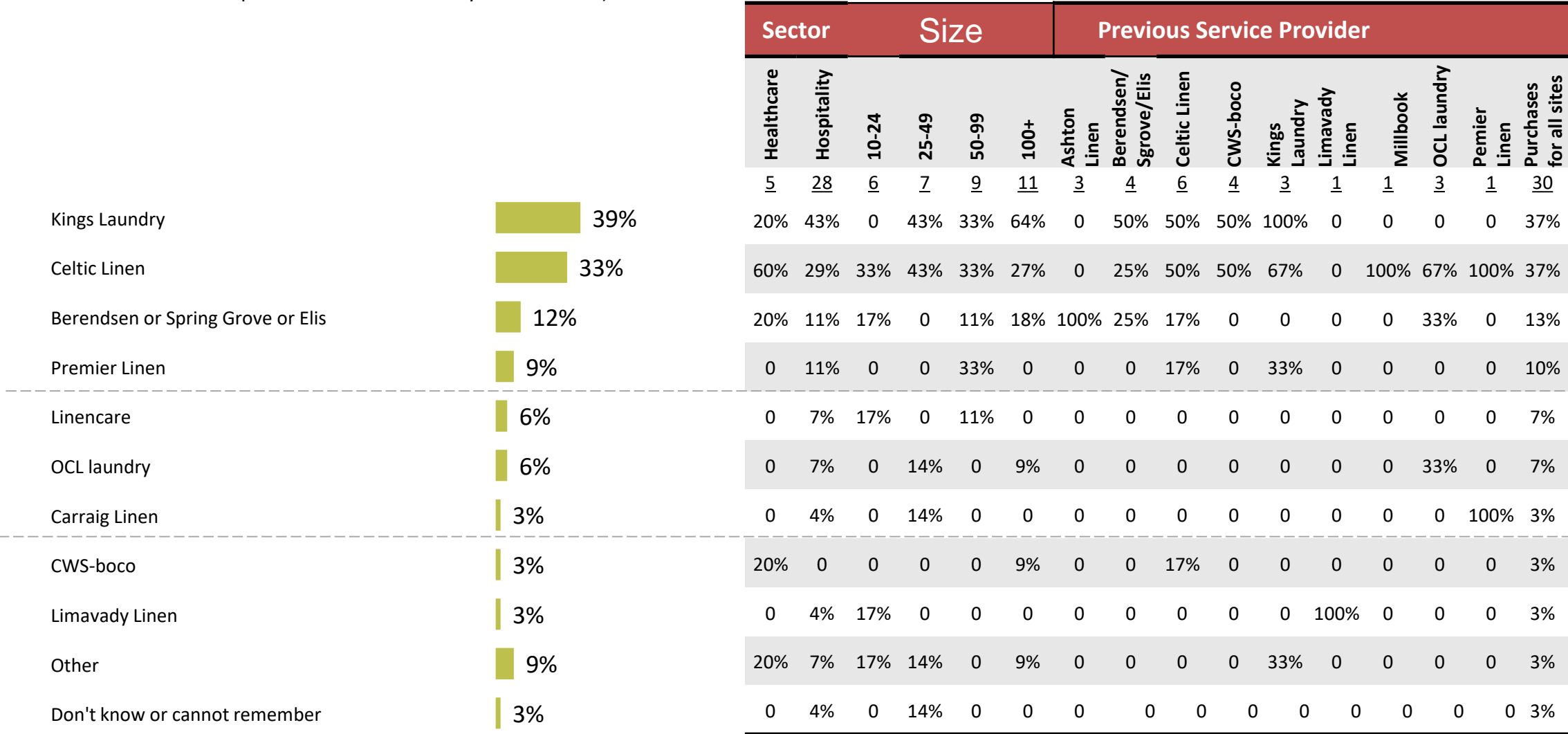
(BASE : Issued a tender or sent quotes– 66)





# And they were the top three most likely to meet requirements

(BASE : Issued a tender or sent quotes and knew who they sent it to– 33)



# Quality and price are the most likely reasons for an organisation not meeting the requirements

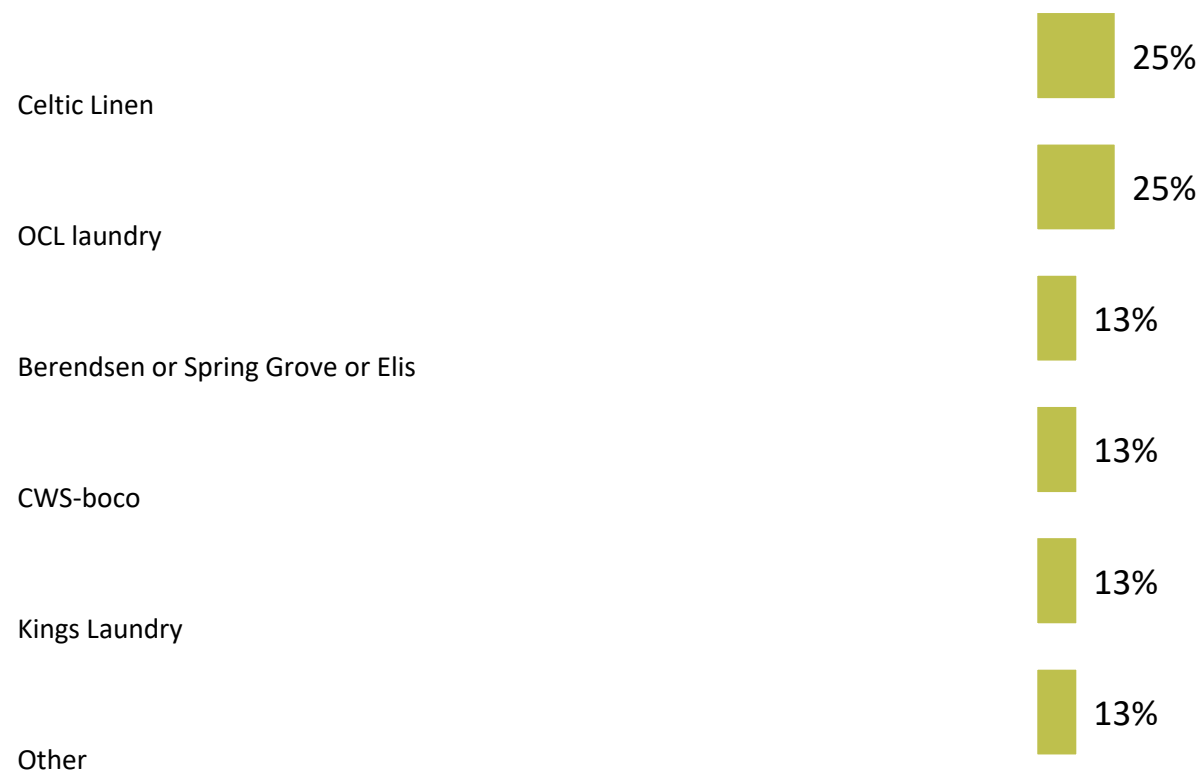
Base: Tendered/ submitted a quote but did not meet requirements

Low base size so frequencies only provided

	Service Provider								
	Berendsen/ Sgrove/Elis	Celtic Linen	Kings Laundry	OCL Laundry	Linencare	Premier Linen	Millbrook	CWS Boco	
	6	8	5	2	1	1	1	1	
Quality of linen/ service	2	3		1		1		1	
On price	3	3	3	1	1		1		
Delivery time wasn't guaranteed/ unsuitable	2		1			1			
In frequent deliveries		3							
Reputation		1							
Not able to meet needs/supply			1	1					
Competitiveness on abilities					1				

# Celtic Linen and OCL laundry were most likely to have come second in evaluations

All who had more than one supplier meet their requirements: 8



Who came First								
	Berendsen/ Sgrove/Elis Carraig Linen	Celtic Linen	Kings Laundry	Limavady Linen	Linencare	Premier Linen	Other	
Celtic Linen	1					1		
OCL laundry		1	1					
Berendsen or Spring Grove or Elis		1						
CWS-boco		1						
Kings Laundry		1						1

One respondent had more than 2 who met their requirements. Their main supplier was premier Linen, second was Celtic Linen and Kings was third. *Dublin hotel.*

# Strengths and weakness of main provider compared to who came second

(BASE : All who had 2 or more tenders met requirements – 8\*)

Main: Carraig Linen  
Second: Celtic Linen  
Strength: Punctual  
Weakness: None

Main: Celtic Linen  
Second: OCL Laundry  
Strength : Quality of linen, price, correct delivery times  
Weakness: None

Main: Kings Laundry  
Second: OCL Laundry  
Strength : Quality and reliability of service  
Weakness: None

Main: Celtic Linen  
Second: Kings Laundry  
Strength : Price  
Weakness: Quality

Main: Kings Laundry  
Second: National Laundry  
Strength : Proven track record  
Weakness: Expensive initial investment (Kings)

Main: Celtic Linen  
Second: CWS- Boco  
Strength : Tender submitted and carried out service as per tender  
Weakness: None

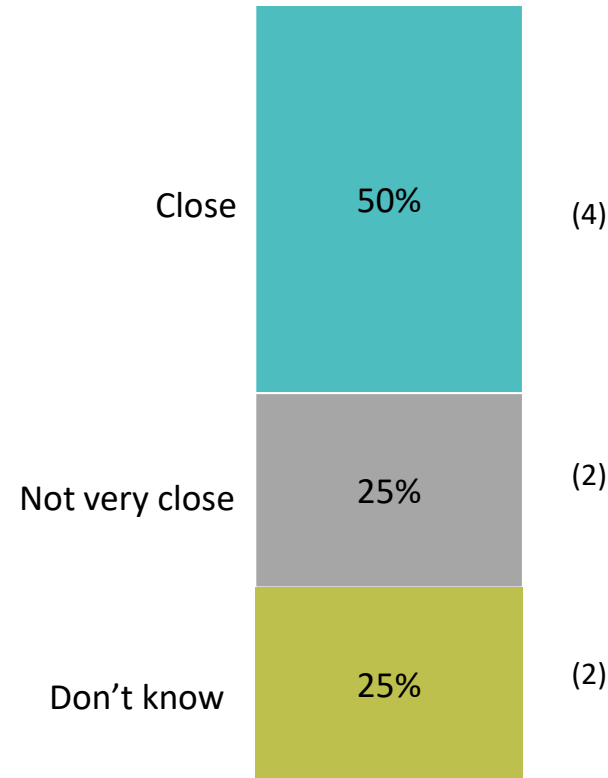
Main: Celtic Linen  
Second: Berendsen/ Spring Grove/ Elis  
Strength : Quality of service  
Weakness: None

\*No answer from one respondent

Q35 What were the strengths/ weaknesses of main compared to who came second?

# Only a very small number had 2 providers who sent in a quote and met the requirements

(BASE : Issued a tender or sent quotes – 8)

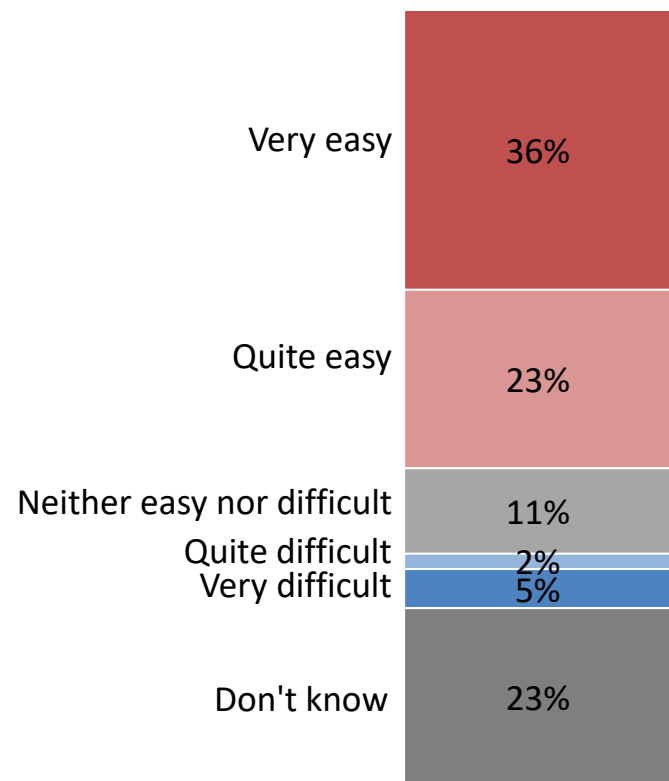


First	Second
Celtic Linen	Berendsen/ Spring Grove/ Elis
Kings Laundry	Other
Celtic Linen	Kings Laundry
Premier Linen	Celtic Linen

First	Second
Carraig Linen	Celtic Linen
Kings Laundry	OCL Laundry

# The majority who switched found the process easy

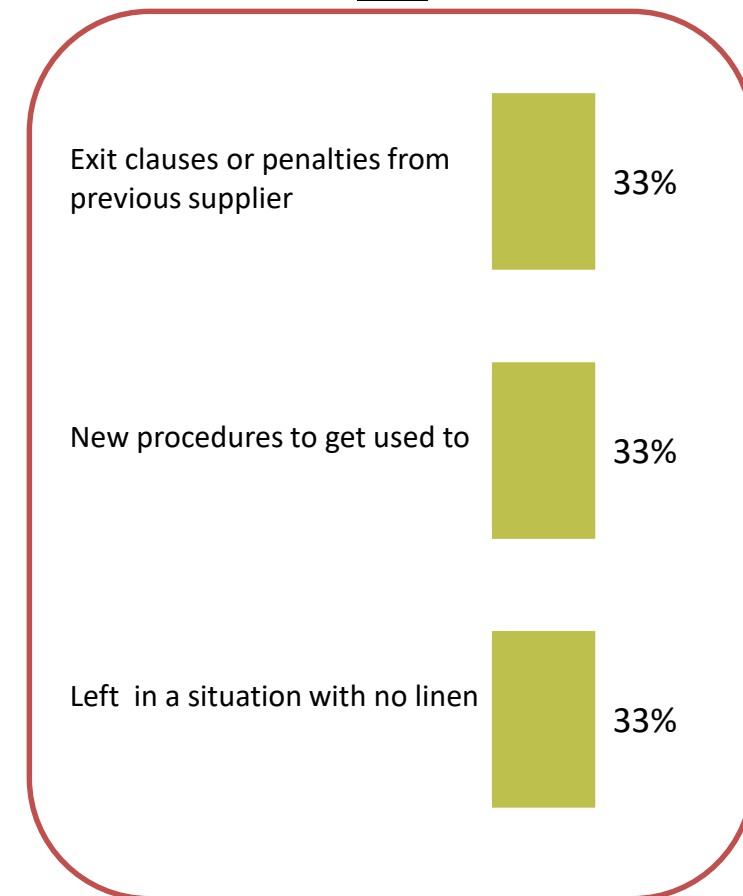
(BASE : Issued a tender or sent quotes and supplier is not the same as previous – 44)



	Sector		
	Healthcare	Hospitality	Purchases for all sites
Easy	43%	62%	58%
Difficult	0	8%	8%

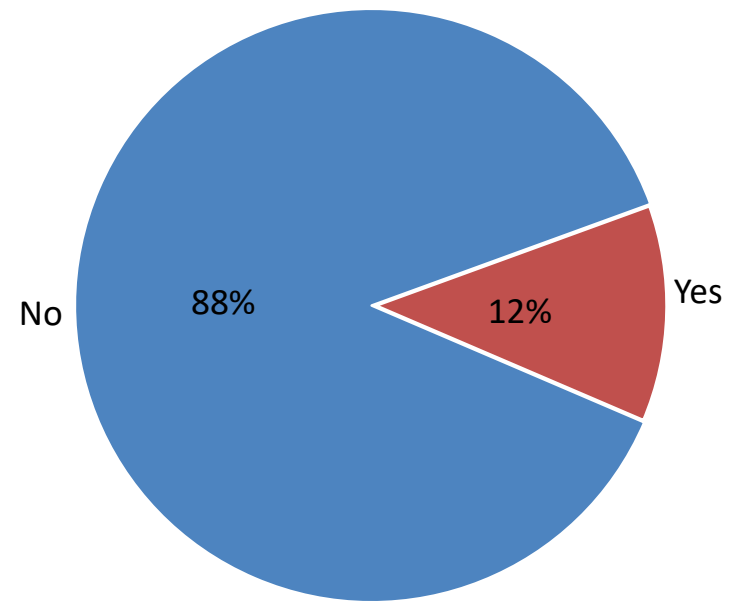
## Why do you say that?

**N=3**



# Just over one in ten who issued a tender have become aware of a new provider

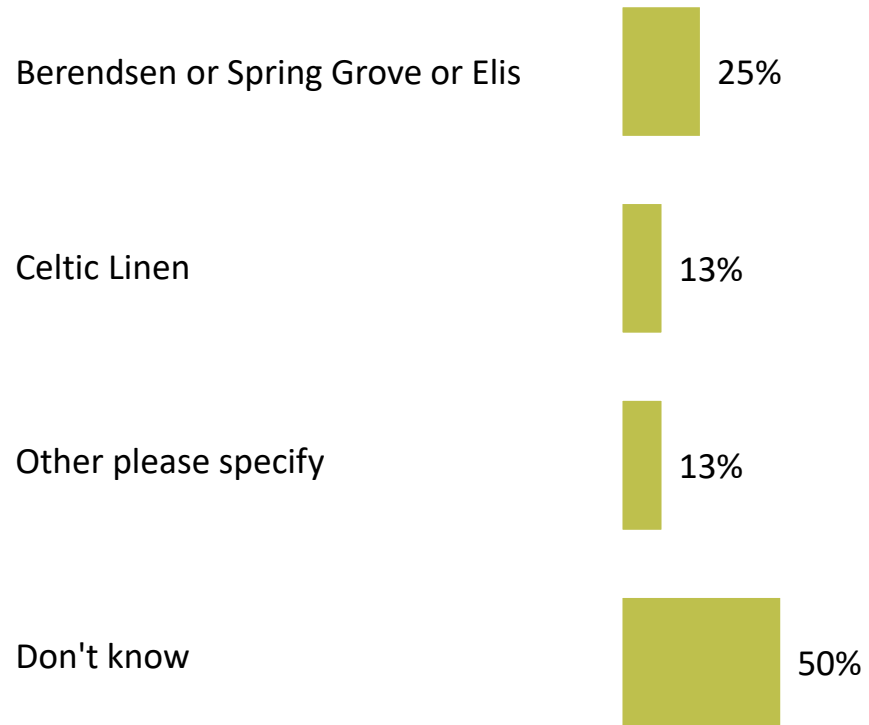
(BASE : Issued a tender or sent quotes – 66)



	Sector		Size					Service Provider									
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Ashton Linen	Berendsen/Sgrove/Elis	Carraig Linen	Celtic Linen	Kings Laundry	Limavady Linen	Linencare	OCL laundry	Premier Linen	Purchases for all sites
	11	55	2	7	13	18	26	1	6	1	13	21	1	6	3	4	55
Yes	27%	9%	50%	14%	0	22%	8%	100%	17%	0	8%	14%	0	0	0	25%	13%

# There was limited recall of the names of the new providers

(BASE : Issued a tender or sent quotes and all aware of new providers – 8)





# Likelihood of considering a new provider in the sector

(BASE : All who purchase linen laundry services – 109)

	Sector		Size					Service Provider										
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Ashton Linen	Berendsen/Sgrove/Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady Linen	Linencare	OCL laundry	Premier Linen	Purchases for all sites
	26	83	4	16	20	29	40	3	14	1	26	1	28	1	8	3	7	90
Very likely	4%	17%	0	19%	0	24%	13%	0	7%	0	15%	100%	7%	100%	25%	33%	14%	14%
Fairly likely	35%	37%	50%	25%	40%	31%	43%	0	36%	100%	35%	0	39%	0	38%	33%	57%	38%
Neither likely nor unlikely	23%	11%	25%	19%	10%	17%	10%	33%	14%	0	12%	0	14%	0	0	33%	14%	12%
Fairly unlikely	15%	18%	0	19%	20%	14%	20%	33%	21%	0	15%	0	21%	0	13%	0	0	16%
Very unlikely	12%	16%	25%	19%	25%	10%	10%	33%	21%	0	15%	0	14%	0	25%	0	14%	17%
Would not consider	4%	1%	0	0	5%	0	3%	0	0	0	0	0	4%	0	0	0	0	1%
Don't know	8%	0	0	0	0	3%	3%	0	0	0	8%	0	0	0	0	0	0	2%
Likely	38%	54%	50%	44%	40%	55%	55%	0	43%	100%	50%	100%	46%	100%	63%	67%	71%	52%
Unlikely/ would not consider*	31%	35%	25%	38%	50%	24%	33%	67%	43%	0	31%	0	40%	0	38%	0	14%	34%

Q41 Next time you choose a provider of linen laundry services, how likely would you say you are to consider a linen laundry provider that was new to the sector your organisation is operating in?

\* Rounding of figures may occur

# Those who would not consider a new provider are happy with their current provider or would be concerned about the lack of history

(BASE : All respondents who said fairly unlikely/very unlikely/ to consider a linen laundry provider that was new to the sector your organisation is operating in 37

Unlikely to consider a new linen laundry provider

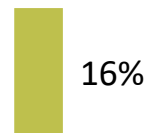
Happy with who we are with



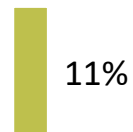
No history of service to compare with



Our size/industry demands high quality service



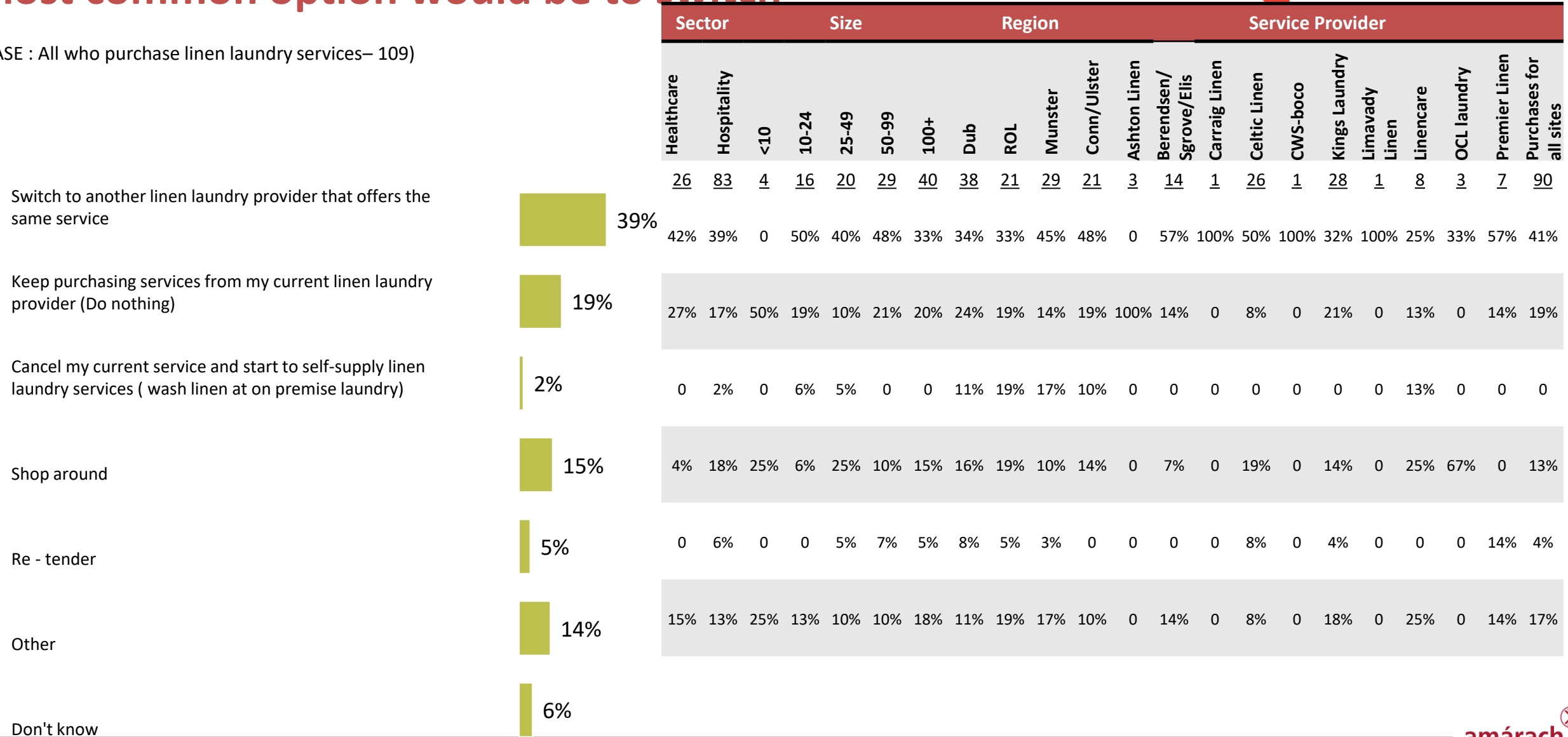
Other



Sector	Size						Service Provider							
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Ashton Linen	Berendsen/Sgrove/Elis	Celtic Linen	Kings Laundry	Linencare	Premier Linen	Purchases for all sites
	8	29	1	6	10	7	13	2	6	8	11	3	1	30
Happy with who we are with	38%	48%	100%	83%	30%	43%	38%	100%	50%	38%	55%	67%	0	43%
No history of service to compare with	13%	38%	0	0	40%	57%	31%	0	17%	50%	36%	33%	0	37%
Our size/industry demands high quality service	25%	14%	0	17%	20%	29%	8%	0	33%	13%	9%	33%	100%	20%

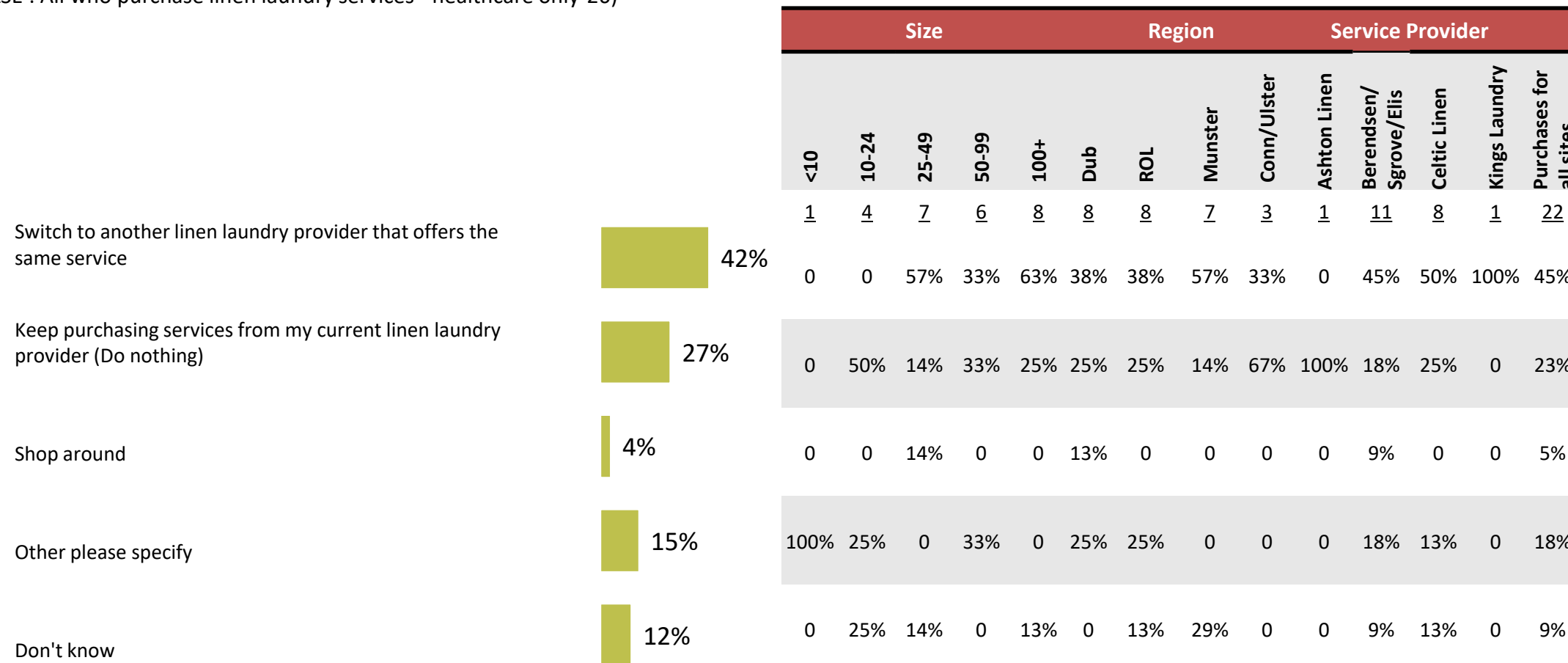
# If there was a 5-10% price increase by their current provider the most common option would be to switch

(BASE : All who purchase linen laundry services– 109)



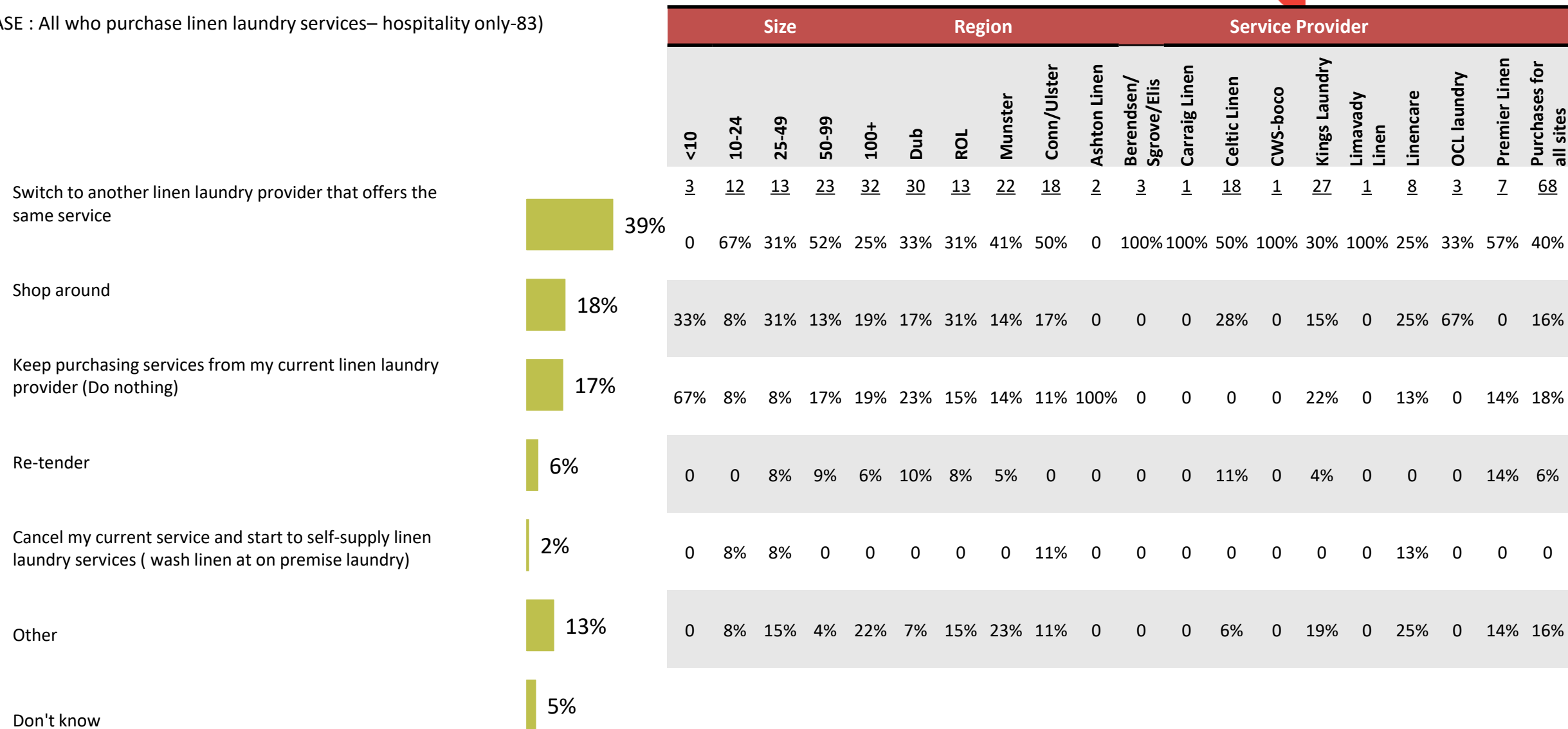
# Affect of price increase by healthcare sector

(BASE : All who purchase linen laundry services– healthcare only-26)



# Affect of price increase by hospitality sector

(BASE : All who purchase linen laundry services– hospitality only-83)



# The majority did not know which provider they would be most likely to switch to

(BASE : Switch to another linen laundry provider that offers the same service – 43)

Berendsen or Spring Grove or Elis

7%

Celtic Linen

5%

Kings Laundry

5%

Don't know

84%

Sector	Size						Service Provider										
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Berendsen/ S Grove/Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady Linen	Linencare	OCL laundry	Premier Linen	Purchases for all sites
	11	32	0	8	8	14	13	8	1	13	1	9	1	2	1	4	37
Berendsen or Spring Grove or Elis	18%	3%	0	13%	0	7%	8%	0	0	15%	0	11%	0	0	0	0	8%
Celtic Linen	9%	3%	0	13%	0	0	8%	13%	0	0	0	0	0	0	0	25%	5%
Kings Laundry	0	6%	0	13%	0	7%	0	0	0	8%	0	0	0	0	0	25%	3%
Don't know	73%	88%	0	63%	100%	86%	85%	88%	100%	77%	100%	89%	100%	100%	100%	50%	84%

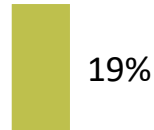
# If the increase in price was across all providers the majority would stay with their current provider

(BASE : Switch to another linen laundry provider that offers the same service – 43\*)

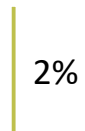
Keep purchasing current linen laundry services



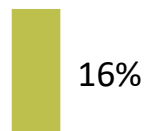
Cancel my current service and start to self-supply linen laundry services (purchase linen stock and wash it at on premise laundry)



Other specify



Don't know



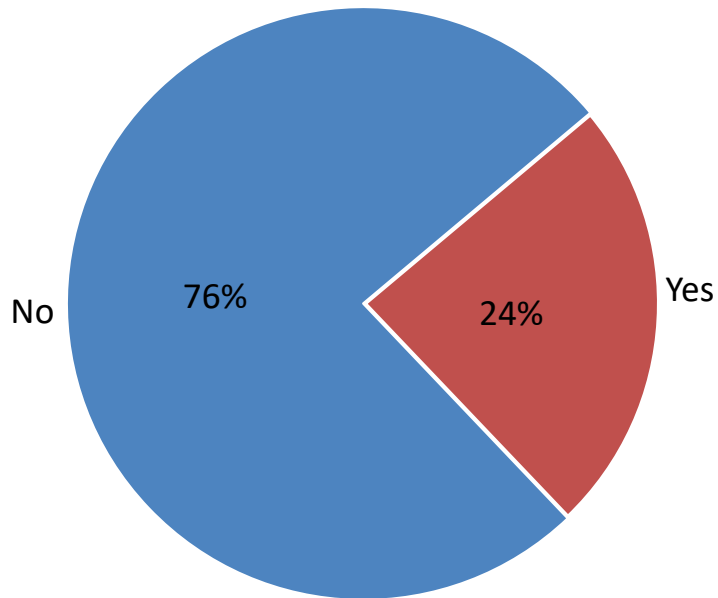
Sector	Size						Service Provider										
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Berendsen/ S Grove/Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady Linen	Linencare	OCL laundry	Premier Linen	Purchases for all sites
	11	32	0	8	8	14	13	8	1	13	1	9	1	2	1	4	37
	73%	59%	0	63%	63%	71%	54%	63%	100%	69%	0	56%	0	50%	0	75%	62%
	9%	22%	0	38%	25%	14%	8%	25%	0	23%	100%	0	100%	50%	0	0	22%
	9%	0	0	0	0	0	8%	13%	0	0	0	0	0	0	0	0	3%
	9%	19%	0	0	13%	14%	31%	0	0	8%	0	44%	0	0	100%	25%	14%

\* Caution small base size

Q43c Now imagine that aforementioned hypothetical 5%-10% price increase would be implemented by all linen laundry providers

# One quarter are aware of the proposed acquisition

(BASE : All respondents: 182)



	Sector		Size					Main Service Provider										Self Supply		
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Ashton Linen	Berendsen/ Sgrove/ Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady Linen	Linencare	OCL laundry	Premier Linen	Yes	No	Purchases for all sites
	60	122	10	31	39	47	55	3	14	1	26	1	28	1	8	3	7	73	109	90
Yes	22%	25%	20%	10%	21%	23%	35%	67%	14%	0	38%	100%	36%	0	0	33%	29%	12%	31%	33%



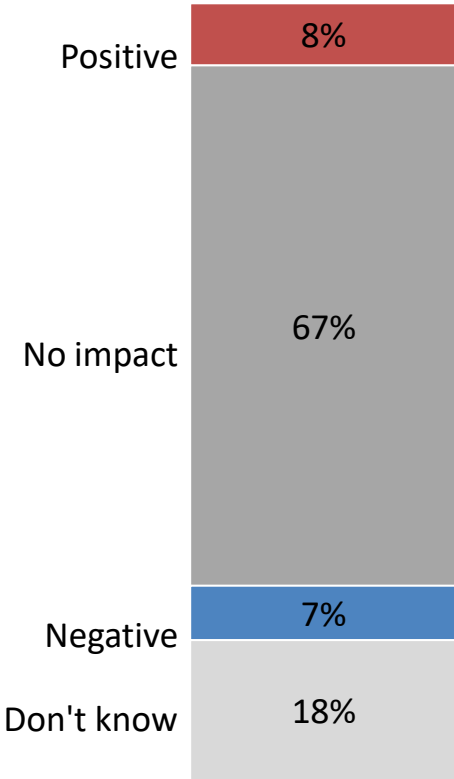
# The majority in each sector say the proposed acquisition will have a neutral impact

(BASE : All respondents: 182)

	Sector		Size				Main Service Provider										Self supply		Purchases for all sites	
	Healthcare	Hospitality	<10	10-24	25-49	50-99	100+	Ashton Linen	Berendsen/Sgrove/Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady Linen	Linencare	OCL laundry	Premier Linen	Yes		No
	60	122	10	31	39	47	55	3	14	1	26	1	28	1	8	3	7	73	109	90
<b>Positive</b>	8%	16%	0	6%	15%	17%	15%	0	29%	100%	23%	100%	21%	0	25%	0	14%	4%	19%	23%
<b>No impact</b>	67%	64%	70%	65%	69%	57%	67%	100%	21%	0	50%	0	64%	100%	50%	33%	43%	79%	55%	52%
<b>Negative</b>	7%	9%	0	6%	8%	11%	9%	0	14%	0	19%	0	11%	0	25%	0	14%	3%	12%	13%
<b>Don't know</b>	18%	11%	30%	23%	8%	15%	9%	0	36%	0	8%	0	4%	0	0	67%	29%	14%	14%	11%

# Impact of acquisition by healthcare sector

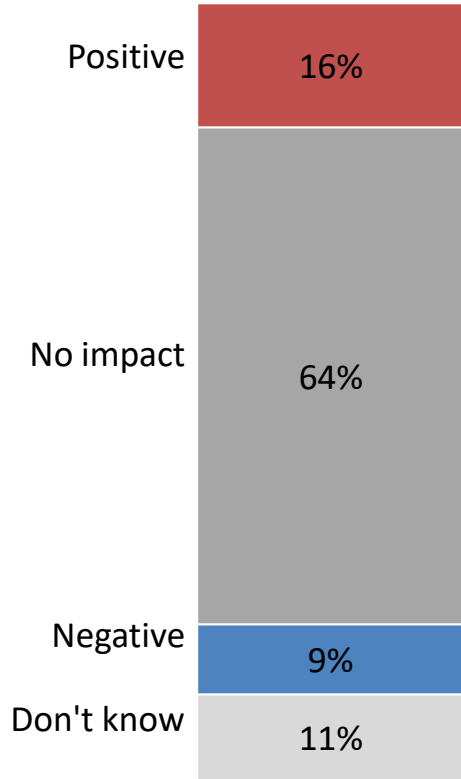
(BASE : All healthcare respondents: 60)



	Sector		Size					Main Service Provider				Self supply		
	Public	Private	<10	10-24	25-49	50-99	100+	Ashton Linen	Berendsen/Sgrove/Elis	Celtic Linen	Kings Laundry	Yes	No	Purchase for all sites
	18	40	1	9	18	20	12	1	11	8	1	34	26	22
Positive	6%	10%	0	0	11%	10%	8%	0	18%	13%	0	6%	12%	14%
No impact	56%	70%	0	67%	72%	70%	58%	100%	27%	50%	100%	82%	46%	41%
Negative	17%	3%	0	0	6%	0	25%	0	9%	25%	0	3%	12%	14%
Don't know	22%	18%	100%	33%	11%	20%	8%	0	45%	13%	0	9%	31%	32%

# Impact of acquisition by hospitality sector

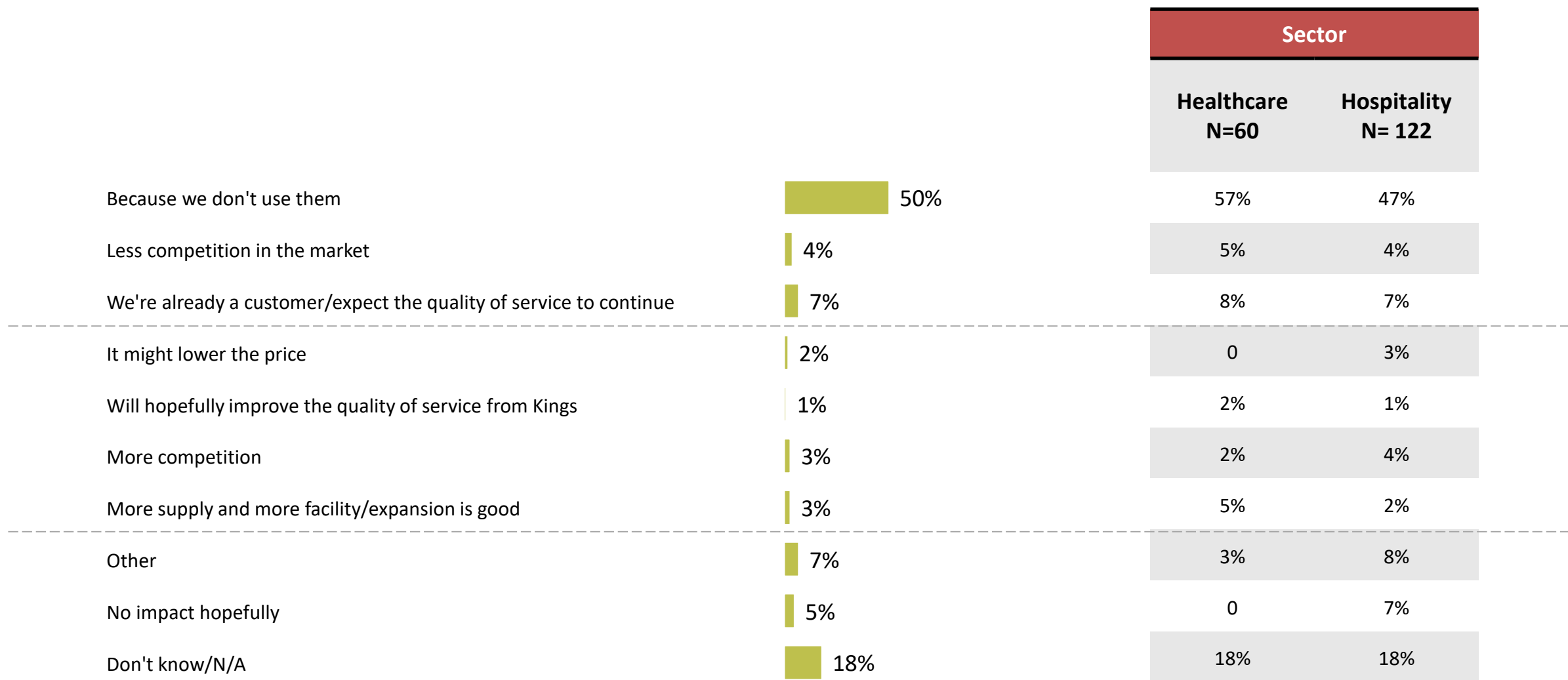
(BASE : All hospitality respondents: 122)



	Size					Main Service Provider										Self supply		
	<10	10-24	25-49	50-99	100+	Ashton Linen	Berendsen/Sgrove/Elis	Carraig Linen	Celtic Linen	CWS-boco	Kings Laundry	Limavady Linen	Linencare	OCL laundry	Premier Linen	Yes	No	Purchase for all sites
	9	22	21	27	43	2	3	1	18	1	27	1	8	3	7	39	83	68
Positive	0	9%	19%	22%	16%	0	67%	100%	28%	100%	22%	0	25%	0	14%	3%	22%	26%
No impact	78%	64%	67%	48%	70%	100%	0	0	50%	0	63%	100%	50%	33%	43%	77%	58%	56%
Negative	0	9%	10%	19%	5%	0	33%	0	17%	0	11%	0	25%	0	14%	3%	12%	13%
Don't know	22%	18%	5%	11%	9%	0	0	0	6%	0	4%	0	0	67%	29%	18%	8%	4%

# Only 4% would be worried about less competition in the market

(BASE : All respondents: 182)



# Appendix



# Laundry requirements by organisation type

(Base: All respondents: 182)

	Organisation type										
	Hotel	B&B	Restaurant	Caterer	Higher Education Institution	Public Hospital	Private hospital	Public nursing home	Private nursing	Other hospitality	Other healthcare
	103	11	4	2	1	17	7	1	33	1	2
Washes linen at in-house laundry for all sites	28%	55%	50%	50%	0	29%	43%	0	73%	0	100%
Washes linen at in-house laundry for some sites and purchases washing-only services for other sites	2%	0	0	0	0	0	0	0	0	0	0
Purchases washing-only services from commercial laundry for all sites	7%	0	0	0	100%	18%	0	0	3%	100%	0
Washes rented linen at in-house laundry for all sites	1%	0	0	0	0	0	0	0	0	0	0
Washes rented linen at in-house laundry for some sites and purchases washing services for other sites	4%	0	0	0	0	0	0	0	0	0	0
Purchases linen rental and washing services from commercial laundries for all sites	58%	45%	50%	50%	0	53%	57%	100%	24%	0	0

# Requested quotes or sent tenders to three or more providers

## Total N=6

## Healthcare N=2

## Hospitality N=4

	Number of mentions
Celtic Linen	5
Berendsen or Spring Grove or Elis	4
Kings Laundry	4
Linencare	2
CWS-boco	1
OCL laundry	1
Premier Linen	1

	Number of mentions
Berendsen or Spring Grove or Elis	1
Celtic Linen	1
CWS-boco	1
Kings Laundry	1

	Number of mentions
Celtic Linen	4
Berendsen or Spring Grove or Elis	3
Kings Laundry	3
Linencare	1
OCL laundry	1
Premier Linen	1

# Requested quotes or sent tenders to two providers

**Total**  
**N=12**

**Healthcare**  
**N=1**

**Hospitality**  
**N=11**

	Number of mentions
Kings Laundry	8
Celtic Linen	6
Berendsen or Spring Grove or Elis	4
OCL laundry	2
Linencare	1

	Number of mentions
Berendsen or Spring Grove or Elis	1
Celtic Linen	1

	Number of mentions
Kings Laundry	8
Celtic Linen	5
Berendsen or Spring Grove or Elis	3
OCL laundry	2
Linencare	1



# Requested quotes or sent tender to one provider

**Total  
N=48**

**Healthcare  
N=8**

**Hospitality  
N=40**

	Number of mentions
Celtic Linen	4
Open tender	2
CWS-boco	1
Kings Laundry	1
Limavady Linen	1
OCL laundry	1
Robinson	1

	Number of mentions
Open tender	2
CWS-boco	1

	Number of mentions
Celtic Linen	4
Kings Laundry	1
Limavady Linen	1
OCL laundry	1
Robinson	1

# Received a bid/quote from three or more

**Total (all in the hospitality sector )**

**N=11**

	Number of mentions
Celtic Linen	10
Kings Laundry	8
Berendsen or Spring Grove or Elis	5
Linencare	2
OCL laundry	2
Premier Linen	2
Carraig Linen	1
CWS-boco	1
Limavady Linen	1
Millbrook	1

# Received a bid/quote from two providers

## Total

N=15

	Number of mentions
Celtic Linen	9
Kings Laundry	8
Berendsen or Spring Grove or Elis	5
OCL laundry	2
Premier Linen	2
CWS-boco	1

## Healthcare

N=4

	Number of mentions
Celtic Linen	3
Berendsen or Spring Grove or Elis	2
CWS-boco	1
Kings Laundry	1

## Hospitality

N=11

	Number of mentions
Kings Laundry	7
Celtic Linen	6
Berendsen or Spring Grove or Elis	3
OCL laundry	2
Premier Linen	2

# Received a bid/quote from one provider

**Total**  
**N=40**

**Hospitality**  
**N=33**

7 in healthcare, only other and don't know mentioned

	Number of mentions
Kings Laundry	3
Linencare	2
Celtic Linen	1
Don't know	33

	Number of mentions
Kings Laundry	3
Limavady Linen	2
Celtic Linen	1
Don't know	27

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