2014 OFFICE INDUSTRY INSIGHTS TENANT ATTITUDES TOWARD PESTS AND PEST CONTROL













74 % OF OFFICE TENANTS



















THINK ENVIRONMENTALLY FRIENDLY PRODUCTS

→ ARE IMPORTANT

ARE CONCERNED WITH CHEMICALS USED IN PEST CONTROL PRODUCTS

MOST OFFICE TENANTS HAVE ENCOUNTERED PESTS AT WORK — AND ON MULTIPLE OCCASIONS

Three in four office tenants have seen flies at the office, and just under 2/3 have seen an ant. Approximately half of all offices have experienced cockroaches, and 42% have had rodents.

NOTE: Mid-size and large companies (10+ employees) are significantly more likely to have seen a cockroach, ant or rodent than small companies.

PEST ENCOUNTERS (PAST 12m) (n=300)	1 OR MORE TIMES	ONCE	2-3x	4-5x	6x +	1 OR MORE TIMES
Flies	73%	13%	29%	10%	21%	< 10 10 - 99 100+
Ants	63%	16%	24%	10%	12%	(n=100) A (n=100) B (n=100) C
Cockroaches	49%	18%	17%	7%	8%	37% 53% A 57% A
Rodents	42%	19%	17%	4%	3%	SUMS TO + / - 100% DUE TO ROUNDING
Bed Bugs	7%	4%	3%	0%	< 1%	
Other (n=49)	20%	0%	27%	16%	37%	

Individual data points do not add up to "1 or more times" due to rounding

Spiders (22%), Crickets (6%), Fleas (6%), Fruit Flies (6%), Stink Bugs (6%) Mentions less than 6% not included

9 OUT OF 10 OFFICE TENANTS TOLD SOMEONE ABOUT A PEST SEEN IN THE OFFICE

75% of those who told someone told more than one person. 88% mentioned the encounter to someone in person or on the phone, while 25% posted it on social media.

DID YOU TELL ANYONE ABOUT THE PESTS?	n=267
Yes, I told someone	88%
l told 1 person	24%
I told 2-5 people	49%
l told 6-10 people	9%
I told more than 10 people	5%

SUMS TO + / - 100% DUE TO ROUNDING

Individual data points do not add up to "Yes, I told someone" due to rounding

HOW DID YOU TELL THEM?	n=234
Mentioned it in person / on the phone	88%
Posted on social media	25%
Blogged about it	3%
Emailed about it	1%
Other	3%

OFFICE TENANTS LEAST LIKE TO SEE RODENTS IN THE OFFICE

THE PEST TENANTS LEAST LIKE TO SEE	n=300
Rodents	38%
Cockroaches	29%
Bed Bugs	24%
Flies	3%
Ants	3%
Other (Spiders, Stink Bugs, Mice, All of the above)	3%

OFFICE TENANTS' THRESHOLD FOR REPORTING PESTS ON FIRST SIGHTING IS LOW

43% of office tenants will report a pest after a single sighting. 40% of tenants report after seeing pests on more than one occasion. Very few tenants will try to rectify the situation themselves first (9%), or wait to hear that others in the building are having similar issues (6%).

TENANTS REPORT A PEST SIGHTING	n=300
After seeing a single pest	43%
After seeing pests on more than one occasion	40%
After trying to rectify the situation myself unsuccessfully	9%
After someone else in my building also saw a pest	1%
After talking to others in my building who have had a similar pest experience	5%

OFFICE TENANTS WILL BEGIN LOOKING FOR A NEW SPACE WHEN FACED WITH RECURRING PEST ISSUES

50% of office tenants indicate that recurring pest issues would cause them to look for new office space, while only 20% state that a pest problem would not cause them to look for a new office.

NOTE: The larger the company, the less likely to look for new office space due to pest problems.

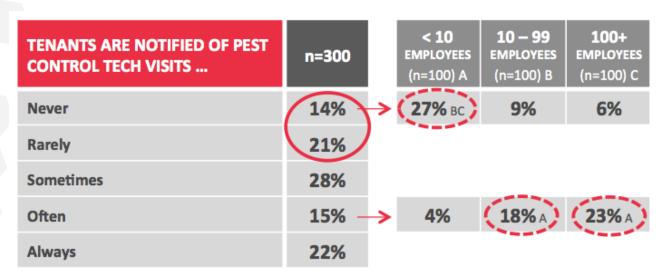
TENANTS BEGIN SEARCHING FOR A NEW OFFICE	n=300			
After experience recurring pest issues	50%			
After one week of no response from management	12%			
After a day or two of no response from management	12%			
After trying to resolve the problem myself unsuccessfully	13%			
At the first signs of an infestation	10%			
At the first sight of a pest	6%	< 10 EMPLOYEES	10 – 99 EMPLOYEES	100+ EMPLOYEES
Other	1%	(n=100) A	(n=100) B	(n=100) C
A pest problem wouldn't cause me to look for a new office	19%	> 11%	19%	28% A

Multiple mentions allowed

35% OF OFFICE TENANTS ARE RARELY OR NEVER NOTIFIED OF PEST CONTROL TECH VISITS

28% of office tenants get notified some of the time, and 37% are notified often or always.

NOTE: The smaller the company, the less likely they are to be notified.



MOST OFFICE TENANTS WANT TO KNOW IN ADVANCE WHEN THE PEST CONTROL TECH IS COMING

41% of office tenants don't require face-to-face involvement with pest control techs, but they do want to be notified of the specific day and time a tech will be coming. Only 1/3 of office tenants do not prefer to be involved at all in pest control.

Among those who do want to know when the tech is coming and what he did, twice as many prefer to know the day and time vs. knowing what the tech did during the visit.

REFERENCE FOR INVOLVEMENT IN EST CONTROL	n=300
Prefer <u>face-to-face</u> involvement	27%
Just want to know <u>when</u> the tech is coming and <u>what</u> he did	41%
Prefer to be <u>uninvolved</u>	32%
CHAIC TO . / 100% DUE TO BOUNDING	

SUMS TO + / - 100% DUE TO ROUNDING

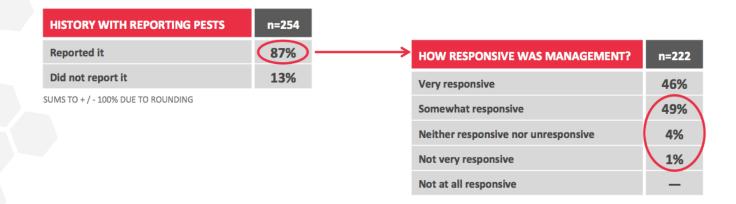
97% OF OFFICE TENANTS WANT TO BE NOTIFIED WHEN IT COMES TO PEST CONTROL ISSUES

59% prefer email and nearly half prefer a phone call. Only 6% of tenants want to be contacted via text.

COMMUNICATION PREFERENCE ON PEST CONTROL ISSUES	n=300
Email from property management	59%
Phone call	48%
Written communication delivered to my office	16%
Flyers posted in common areas	9%
Text	6%
I do not need to be notified	3%

Multiple mentions allowed

54% OF OFFICE TENANTS BELIEVE THEIR MANAGEMENT HAS AN OPPORTUNITY TO BE MORE RESPONSIVE



50% OF OFFICE TENANTS EXPECT PEST ISSUES TO BE RESOLVED IN 24 HOURS OR LESS—78% WITHIN A FEW DAYS OR LESS

68% of tenants expect a response regarding pest issues within 24 hours making the results for "respond" and "resolve" very similar.

EXPECTED <u>RESPONSE</u> TIME	n=300
Within minutes	4%
Within a few hours	19%
The same day	34%
Within 24 hours	34%
Within a few days	9%
Within a week	1%

EXPECTED RESOLUTION TIME		n=300	
Within a few hours		5%	
The same day	50%	14%	
Within 24 hours		31%	
Within a few days		38%	78%
Within a week		11%	
Within a few weeks		1%	

PRIMARY PEST CONTROL CONTACTS MANAGE A VARIETY OF EMPLOYEE REACTIONS TO PEST CONTROL PROBLEMS

Over half of tenants indicate that employees come straight to them when there is a pest encounter in the office, while 1 in 4 say that employees whine and complain.

NOTE: Mid to large size companies manage more pest reports, complaints, whining and gossip than small companies.

EMPLOYEES' REACTION TO PEST CONTROL ISSUES	n=300 < 10 EMPLOYEES (n=100) A (n=100) B 10 - 99 EMPLOYEES (n=100) B 100+ EMPLOYEES (n=100) C
They come to you	57% -> 53% 67% AB 51%
They whine and complain	24% -> 11% 28% A 33% A
They gossip to coworkers	16% -> 7% 15% 27% AB
They try to take care of it themselves	14%
They go to someone else in the company	12%
They make my life miserable	7% -> 3% 10% _A 9%
They do nothing	6%
Don't know / Not sure	8% ->17% AB 3% 4%

Multiple mentions allowed

74% OF OFFICE TENANTS THINK ENVIRONMENTALLY FRIENDLY PRODUCTS ARE IMPORTANT, WHILE 64% ARE CONCERNED WITH CHEMICALS USED IN PEST CONTROL PRODUCTS.

PEST CONTROL PRODUCTS (n=300)	TOP 2 BOX	VERY IMPORTANT / CONCERNED	SOMEWHAT IMPORTANT / CONCERNED	NEUTRAL	NOT VERY IMPORTANT / CONCERNED	NOT AT ALL IMPORTANT / CONCERNED
IMPORTANCE OF ENVIRONMENTALLY FRIENDLY PRODUCTS	74%	33%	41%	18%	6%	2%
CONCERN FOR CHEMICALS IN PEST CONTROL PRODUCTS	64%	21%	43%	23%	11%	2%

80% OF OFFICE TENANTS THAT MAKE DECISIONS ABOUT PEST CONTROL PREFER A RECOGNIZED BRAND

PEST CONTROL BRAND (n=195)	TOP 2 BOX	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	NOT AT ALL IMPORTANT
IMPORTANCE OF A RECOGNIZED BRAND	80%	18%	62%	14%	6%

GETTING RID OF PEST PROBLEMS QUICKLY AND FOR GOOD IS BY FAR THE MOST IMPORTANT IN SELECTING A PEST CONTROL PROVIDER

While trustworthy, knowledgeable and well-trained technicians are important, office tenants rate "gets rid of pest problems quickly and for good" as five times more important in the decision-making process.

IMPORTANCE OF PEST CONTROL PROVIDER ATTRIBUTES (n=300)	ATTRIBUTE RANKING	VERY IMPORTANT	SOMEWHAT IMPORTANT	NEUTRAL	NOT VERY IMPORTANT	NOT AT ALL IMPORTANT
Gets rid of pest problems quickly and for good	58%	77%	14%	7%	1%	1%
Is knowledgeable and well-trained in pest control	11%	70%	19%	7%	1%	2%
Has technicians I can trust in my office	11%	65%	24%	7%	3%	1%
Uses environmentally responsible products	9%	42%	35%	14%	6%	2%
Uses scientifically advanced pest control tools and techniques	6%	47%	33%	15%	2%	3%
Communicates with me effectively and often	5%	47%	37%	12%	3%	1%

RESPONDENT TITLE	n=300	< 10 EMPLOYEES (n=100) A	10 - 99 EMPLOYEES (n=100) B	100+ EMPLOYEES (n=100) C
Office Manager	25%	22%	31%	52% AB
Business Manager	21%	36% c	25%	14%
Facilities Manager / Director / Supervisor	35%	17%	27%	19%
Other (Owner, President, VP, Controller)	19%	25%	17%	15%

OFFICE BUILDING TYPE	n=300	< 10 EMPLOYEES (n=100) A	10 - 99 EMPLOYEES (n=100) B	100+ EMPLOYEES (n=100) C
High-rise (10+ stories)	14%	10%	22% AC	11%
Mid-rise (5-10 stories)	29%	20%	29%	39% A
Corporate Center / Office Park	45%	43%	44%	47%
Strip Mall	12%	27% BC	5%	3%

GENDER	n=300
Male	54%
Female	46%
AGE	n=300
18 – 24	0.3%
25 – 34	12%
35 – 44	23%
45 – 54	28%
55 – 64	29%
65+	7%
REGION	n=300
Northeast	22%
Midwest	20%
South	31%
West	26%

HOUSEHOLD INCOME	n=300
< \$25,000	1%
\$25,000 - \$49,999	7%
\$50,000 - \$74,999	17%
\$75,000 - \$99,999	18%
\$100,000 or more	57%
CHILDREN < 18yrs in HH	n=300
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0	67%
0	67% 14%
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1	14%
1 2	14%
1 2 3	14% 14% 3%

COMPANY SIZE	n=300
< 10 employees	33%
10 – 99 employees	33%
100 or more employees	33%

ETHNICITY	n=300
Caucasian / White	84%
Asian	7%
African American / Black	4%
Hispanic / Latino (of any race)	4%
Other	1%

MARITAL STATUS	n=300
Single (never married)	15%
Married / Partnered	71%
Divorced / Separated / Widowed	15%

