



2014 OFFICE INDUSTRY INSIGHTS

TENANT ATTITUDES TOWARD PESTS AND PEST CONTROL



PEST CONTROL DOWN TO A SCIENCE.™



#1 PEST
OFFICE TENANTS

DON'T WANT
TO SEE



RODENTS

50% OF OFFICE
TENANTS

WILL LOOK FOR NEW

OFFICE SPACE



AFTER EXPERIENCING
RECURRING PEST ISSUES

89% OF OFFICE
TENANTS

HAVE SEEN A

A PEST



IN THE PAST **12** MONTHS





**ALMOST HALF OF
OFFICE TENANTS**

**WILL REPORT
A PEST**  **AFTER A SINGLE
SIGHTING**

74 % OF OFFICE
TENANTS



**THINK ENVIRONMENTALLY
FRIENDLY PRODUCTS
ARE IMPORTANT** 

64% OF OFFICE
TENANTS



**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 + |
|---------------------------------------|-----------------------|------|------|------|------|
| Flies | 73% | 13% | 29% | 10% | 21% |
| Ants | 63% | 16% | 24% | 10% | 12% |
| Cockroaches | 49% | 18% | 17% | 7% | 8% |
| Rodents | 42% | 19% | 17% | 4% | 3% |
| Bed Bugs | 7% | 4% | 3% | 0% | < 1% |
| Other (n=49) | 20% | 0% | 27% | 16% | 37% |

| 1 OR MORE TIMES | | |
|--------------------------------|-----------------------------------|--------------------------------|
| < 10 EMPLOYEES (n=100) A | 10 – 99 EMPLOYEES (n=100) B | 100+ EMPLOYEES (n=100) C |
| 37% | 53% ^A | 57% ^A |

SUMS TO + / - 100% DUE TO ROUNDING

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% |
| I told 1 person | 24% |
| I told 2-5 people | 49% |
| I 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% |

SUMS TO + / - 100% DUE TO ROUNDING

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% |

SUMS TO + / - 100% DUE TO ROUNDING

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% |

SUMS TO + / - 100% DUE TO ROUNDING

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% | | | |
| Other | 1% | | | |
| A pest problem wouldn't cause me to look for a new office | 19% | | | |
| | | < 10 EMPLOYEES (n=100) A | 10 – 99 EMPLOYEES (n=100) B | 100+ EMPLOYEES (n=100) C |
| | | 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.

| TENANTS ARE NOTIFIED OF PEST CONTROL TECH VISITS ... | n=300 | < 10 EMPLOYEES (n=100) A | 10 – 99 EMPLOYEES (n=100) B | 100+ EMPLOYEES (n=100) C |
|--|-------|--------------------------|-----------------------------|--------------------------|
| Never | 14% | 27% ^{BC} | 9% | 6% |
| Rarely | 21% | | | |
| Sometimes | 28% | | | |
| Often | 15% | 4% | 18% ^A | 23% ^A |
| Always | 22% | | | |

SUMS TO +/- 100% DUE TO ROUNDING

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.

| PREFERENCE FOR INVOLVEMENT IN PEST 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% |

SUMS TO + / - 100% DUE TO ROUNDING

| WHICH IS MOST IMPORTANT REGARDING A PEST CONTROL TECH VISIT... | n=123 |
|--|-------|
| WHEN: Knowing in advance the day and time | 68% |
| WHERE: Knowing what the tech did during the visit | 32% |

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

| HISTORY WITH REPORTING PESTS | n=254 |
|------------------------------|-------|
| Reported it | 87% |
| Did not report it | 13% |

SUMS TO + / - 100% DUE TO ROUNDING

| HOW RESPONSIVE WAS MANAGEMENT? | n=222 |
|-------------------------------------|-------|
| Very responsive | 46% |
| Somewhat responsive | 49% |
| Neither responsive nor unresponsive | 4% |
| Not very responsive | 1% |
| Not at all 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 <u>RESOLUTION</u> TIME | n=300 |
|---------------------------------|-------|
| Within a few hours | 5% |
| The same day | 14% |
| Within 24 hours | 31% |
| Within a few days | 38% |
| Within a week | 11% |
| Within a few weeks | 1% |

50%

78%

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 | 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% |

SUMS TO +/- 100% DUE TO ROUNDING

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% |

SUMS TO + / - 100% DUE TO ROUNDING

SUMS TO + / - 100% DUE TO ROUNDING

| 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 |
|------------------------|-------|
| 0 | 67% |
| 1 | 14% |
| 2 | 14% |
| 3 | 3% |
| 4 | 1% |
| 5 | 1% |
| 6 or more | -- |

| 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% |



