2014 RESTAURANT INDUSTRY INSIGHTS

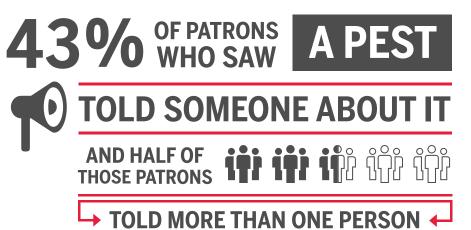
PATRON ATTITUDES TOWARD PESTS & PEST CONTROL



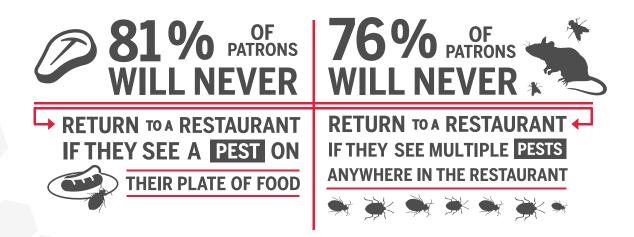
PEST CONTROL DOWN TO A SCIENCE™











HALF SAW A PEST DURING A RESTAURANT VISIT IN THE PAST 12 MONTHS, AND 95% OF THOSE SIGHTINGS INCLUDED FLIES



FLIES ARE PATRONS' MOST FREQUENTLY ENCOUNTERED PEST

PEST ENCOUNTERS (PAST 12m) (n=300)	1 OR MORE TIMES	ONCE	2-3x	4-5x	6x +
Flies	48%	20%	23%	4%	1%
Ants	9%	6%	2%	1%	
Cockroaches	7%	5%	1%	< 1%	
Rodents	1%	1%	1%	-	
Other	6%	1%	3%	1%	< 1%
			SU	IMS TO + / - 100% D	DUE TO ROUNDING

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

Stink Bug, Gnats, Mosquitoes, Bees, Birds, Ticks, Geckos, Silverfish, Fruit Flies

THE DINING ROOM IS THE PLACE PATRONS MOST FREQUENTLY SEE PESTS, AND FLIES ARE BY FAR THE MOST COMMON DINING ROOM OFFENDER

LOCATION OF PEST	n=153			DINING RM
In the dining room	53%	$ \longrightarrow$	TYPE OF PEST	FLOOR
On the patio	20%			(n=81)
In the bar area	11%		Flies	78%
In the bathroom	11%		Cockroaches	16%
	1170		Ants	14%

Flies)
NOTE: Sample size for all other

1%

6%

Other (Beetles, Fruit

Rodents

75% OF FLY SIGHTINGS GO UNREPORTED, MOSTLY BECAUSE PATRONS DON'T CONSIDER FLIES TO BE A BIG ISSUE

FLY SIGHTINGS	n=153
Reported it	25%
Did not report it	75%

\rightarrow	REASON FOR NOT REPORTING	n=115
	It was "just a fly"	44%
	Not a big deal/ I didn't care	17%
	There were people going in and out/the door was open	9%
	Decided to leave/already leaving	5%
	Didn't think restaurant care/would make a difference	4%
	Don't know	4%

Mentions less than 6% not included

43% OF PATRONS WHO SAW A PEST TOLD SOMEONE ABOUT IT, AND HALF OF THOSE PATRONS TOLD MORE THAN ONE PERSON

DID YOU TELL ANYONE ABOUT THE PESTS?	n=153		
Yes, I told someone	43%		
I told 1 person	22%		
l told 2-5 people	18%		
I told 6-10 people	2%		
I told more than 10 people	1%		

SUMS TO + / - 100% DUE TO ROUNDING

BY A WIDE MARGIN, PATRONS WOULD LEAST LIKE TO SEE RODENTS IN

Cockroaches rank a distant second but are the only other pest with a measurable presence when it comes to pests patrons would least like to see.

THE PEST RESTAURANT USERS LEAST LIKE TO SEE	n=300
Rodents	60%
Cockroaches	31%
Flies	4%
Ants	2%
Other (Snakes, Rats, Geckos)	2%

SUMS TO + / - 100% DUE TO ROUNDING

56% OF PATRONS ARE LIKELY TO TAKE TO THE INTERNET AFTER A PEST SIGHTING TO WRITE A NEGATIVE REVIEW, POST ON SOCIAL MEDIA OR BLOG ABOUT IT

PATRONS THAT TAKE TO THE INTERNET 56% (n=300)

64% OF PATRONS ARE LIKELY TO MENTION A PEST SIGHTING TO SOMEONE

1 in 4 are very likely to write a negative review or email about a pest sighting. 15% are very likely to post about it on social media. 8% of say they would contact the Board of Health after seeing a pest in a restaurant.

LIKELIHOOD TO COMMUNICATE A PEST SIGHTING (n=300)	VERY LIKELY	Somewhat Likely	NEITHER LIKELY NOR UNLIKELY	NOT VERY LIKELY	NOT AT ALL LIKELY	
Mention it to someone in person or by phone	45%	19%	10%	4%	8%	
Email about it	24%	13%	15%	15%	28%	
Write a negative review*	23%	18%	17%	13%	24%	
Post on social media*	15%	16%	15%	16%	37%	
Blog about it*	6%	5%	14%	17%	58%	
What other actions would you take? 28% (n=85)						
ANSWER CHOICE · "I have done this" not included						

Tell the manager/owner	51%
Contact the Board of Health	28%
Tell the waitress/waiter 9	9%
Notify corporate/parent company	5%
I would not return	5%

ANSWER CHOICE : "I have done this" not included

28% (OF "OTHER" & 8% OF ALL DINERS)

PATRONS AGED 35-54 ARE SIGNIFICANTLY MORE LIKELY THAN PATRONS AGED 55+ TO POST TO SOCIAL MEDIA OR WRITE A NEGATIVE REVIEW/EMAIL REGARDING PESTS IN RESTAURANTS

LIKELIHOOD TO COMMUNICATE A PEST SIGHTING	n=300	18-34 yrs (n=61) A	35-54 yrs (n=95) B	55+ yrs (n=144) C
Mention it to someone in person or by phone	64%	56%	71%	63%
Write a negative review	41%	39%	51% C	35%
Email about it	37%	38%	46% C	31%
Post on social media	31%	43% C	42% C	19%
Blog about it	11%	16%	11%	9%

PATRONS ARE MOST LIKELY TO LEAVE BEFORE THE END OF A MEAL WHEN PESTS ARE SPOTTED ON OR AROUND FOOD (e.g. kitchen, buffet, plate/food)

Patrons are most likely to do nothing when pests are seen in the parking area, followed by the patio. For each of the non-patio/parking area locations, more than half of patrons indicate they would report pests to a staff member or manager if they were to see a pest in that area.

REACTION TO A PEST SIGHTING (n=300)	HOSTESS AREA	DINING RM FLOOR	BAR AREA	PATIO	KITCHEN	BATHROOM	BUFFET	PLATE / FOOD	PARKING AREA
Report it to staff / a manager	58%	63%	64%	43%	57%	59%	60%	55%	22%
Mention it to my dinner party	14%	10%	10%	14%	5%	11%	5%	3%	13%
Leave before the end of my meal	13%	13%	11%	4%	28%	7%	29%	37%	4%
Nothing	13%	8%	12%	28%	7%	10%	4%	2%	51%
Kill it	3%	7%	3%	11%	2%	14%	2%	2%	11%

SUMS TO + / - 100% DUE TO ROUNDING

PATRONS WILL NEVER RETURN TO A RESTAURANT IF THEY SEE A PEST ON THEIR PLATE/FOOD (81%) OR IF THEY SEE MULTIPLE PESTS IN ANY LOCATION OF THE RESTAURANT (76%)

97% of patrons mention at least one type of pest encounter that would make them never return to a restaurant.

THRESHOLD FOR NEVER RETURNING	n=300
Seeing a pest on my plate/in my food	81%
Seeing multiple pests in any location of the restaurant	76%
Seeing a pest at the buffet	68%
After reporting a pest to an unresponsive staff member/manager	68%
Seeing a pest in the kitchen	61%
Seeing a pest on the dining room floor	45%
Seeing a pest in the hostess area	30%
Seeing a pest in the bar area	30%
Seeing a pest in the bathroom	26%
Seeing a pest on the patio	11%
Seeing a pest in the parking area	6%
Other (Depends on the type of pest, seeing a pest anywhere)	4%
None of these would cause me not to return	3%

Multiple mentions allowed

MORE THAN HALF OF PATRONS EXPECT SOME SORT OF DISCOUNT ON THEIR CURRENT CHECK OR DURING THEIR NEXT VISIT WHEN THEY SEE A PEST IN THE BUFFET, KITCHEN, ON THE DINING ROOM FLOOR OR IN THE BAR AREA

HIGHEST LEVEL OF RESPONSE EXPECTED (n=300)	I EXPECT NO RESPONSE	MANAGER APOLOGY	DISCOUNT ON MY NEXT VISIT	DISCOUNT ON MY CURRENT CHECK	PAY FOR 100% OF MY CURRENT CHECK	PAY FOR 100% OF MY CURRENT CHECK <u>AND</u> OFFER A DISCOUNT ON MY NEXT VISIT
On my plate / In my food	1%	6%	1%	8%	32%	52%
At the buffet	1%	16%	4%	17%	35%	27%
In the kitchen	3%	20%	5%	19%	29%	25%
On the dining room floor	5%	33%	8%	23%	20%	11%
In the bar area	5%	38%	11%	20%	17%	10%
In the hostess area	8%	50%	7%	15%	14%	6%
In the bathroom	10%	53%	9%	12%	11%	5%
On the patio	24%	43%	5%	14%	9%	4%
In the parking area	57%	27%	4%	5%	4%	3%

SUMS TO + / - 100% DUE TO ROUNDING

NEARLY 3 IN 4 PATRONS FELT/WOULD FEEL DISGUSTED OR GROSSED OUT UPON SEEING A PEST

RESPONSE TO SEEING / THE THOUGHT OF SEEING A PEST IN A RESTAURANT	n=300
Disgusted / Grossed out	71%
Concerned	45%
Angry	22%
Scared	7%
Other (Sick, Disappointed, Depends on the type of pest)	5%
Did not / Would not bother me	3%

Multiple mentions allowed

SUMS TO + / - 100% DUE TO ROUNDING

PAST WEEK RESTAURANT USAGE	FULL SERVICE RESTAURANTS n=300	FAST FOOD RESTAURANTS n=300
AVERAGE	2	1.8
0 times		25%
1 time	47%	27%
2 times	30%	24%
3 times	14%	10%
4 times	3%	6%
5 times	4%	6%
6 times	< 1%	1%
7 times	1%	1%
8 times	< 1%	< 1%
9 times	-	
10 times		-
11+ times	0.3%	1%

GENDER	n=300
Male	53%
Female	47%

AGE	n=300
18 – 24	6%
25 – 34	15%
35 – 44	15%
45 – 54	16%
55 - 64	21%
65+	27%

REGION	n=300
Northeast	17%
Midwest	23%
South	34%
West	26%

ETHNICITY	n=300
Caucasian / White	68%
African American / Black	10%
Asian	10%
Hispanic / Latino (of any race)	6%
Other	6%

MARITAL STATUS	n=300
Single (never married)	23%
Married / Partnered	64%
Divorced / Separated / Widowed	13%

HOUSEHOLD INCOME	n=300
< \$25,000	7%
\$25,000 - \$49,999	22%
\$50,000 - \$74,999	26%
\$75,000 - \$99,999	21%
\$100,000 or more	24%

CHILDREN < 18yrs IN HH	n=300
0	81%
1	10%
2	7%
3	1%
4	
5 or more	0.3%

NOTES

